

CHRISTCHURCH CITY

DESTINATION BENCHMARKING SURVEY 2001

FINAL REPORT

Prepared by

The Tourism & Leisure Group Limited

for

Christchurch and Canterbury Marketing

June 2001

CONTENTS

EXECUTIVE SUMMARY.....	3
1 INTRODUCTION.....	10
1.1 Background	10
1.2 Objectives.....	10
1.3 Methodology.....	11
1.4 Presentation of Results.....	11
1.5 Destination Benchmarking.....	12
1.6 Definitions.....	12
2 PROFILE OF VISITORS.....	13
2.1 Visitor Type	13
2.2 Group Size and Composition.....	14
2.3 Age Profile	15
3 ORIGIN OF VISITORS.....	16
3.1 Place of Residence	16
3.2 Location of Accommodation - Day Visitors on Holiday.....	17
3.3 Type of Accommodation Used	17
4 CHARACTERISTICS OF VISIT.....	19
4.1 Reason for Visit	19
4.2 Length of Stay in Christchurch.....	19
4.2.1 Staying Visitors.....	19
4.3 Main Form of Transport Used	24
4.4 Car Parking	25
4.4.1 Ease of Finding and Cost.....	25
4.5 Attractions Visited or Intended to Visit	26
4.5.1 Christchurch Attractions	26
4.5.2 Destination Visited Elsewhere in Canterbury.....	27
5 THE VISITOR INFORMATION CENTRE.....	29
5.1 Whether Visited the VIC.....	29
5.2 VIC Location and Service.....	29
6 VISITOR EXPENDITURE IN CHRISTCHURCH.....	31
6.1 Visitors Staying in Christchurch - By Type of Accommodation.....	31
6.2 Staying Visitors - By Reason for Visit	32
6.2.1 Visitor Expenditure	32
6.3 The Economic Impact of Tourism in Christchurch.....	33

7	VISITORS' OPINIONS.....	35
7.1	Introduction.....	35
7.2	Accommodation.....	35
7.3	Attractions and Places to Visit.....	36
7.4	Places to Eat and Drink	37
7.5	Shops.....	38
7.6	Public Toilets, Cleanliness of Streets and Parks	39
7.7	Ease of Finding Your Way Around	40
7.8	Evening Entertainment	41
7.9	Overall Impression of Christchurch.....	42
7.10	Feeling of Safety.....	43
7.11	Overall Enjoyment of Visit.....	44
7.12	What You Liked Most About Christchurch?	45
7.13	What, if Anything, Spoilt Your Visit to Christchurch?	46
7.14	What Improvements, If Any, Would You Like to See in Christchurch?	48
8	KEY AREAS FOR ACTION.....	51
	Discrimination Against Asian Language Students	51
	Personal Safety of Visitors to Christchurch.....	51
	Visitor Information Signage	51
	Shopping	52
	Public Toilets	52
	Evening Entertainment	52
	Visitor Information Centre (VIC).....	53
	Christchurch – The Shopping Centre for the South Island	53
	Touring Routes.....	53
	Marketing.....	54
9.	APPENDIX 1 – VISITOR COMMENTS.....	55

EXECUTIVE SUMMARY

1) *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 and also their views and opinions of infrastructure and service attributes essential to the tourism industry and ultimately visitor satisfaction with a tourist destination.
- 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.

2) *The Profile of Visitors to Christchurch*

- The proportion of visitors staying in Christchurch was very high at over 98%. This indicates that Christchurch is a ‘hub’ for Canterbury, with most visitors staying in the city and then visiting other locations. Approximately 95% of international visitors to Canterbury stay in Christchurch (IVS) which supports the ‘hub’ concept.
- Over 93% of the groups visiting Christchurch contained adults only. The largest proportion of groups was two adults (43%) and one adult (41%). Approximately 7% of all groups contained at least one child under 16 years old. The average size of groups interviewed was slightly less than two people (1.9).
- Almost 45% of visitors were in the 16-34 age group, over 24% in the 35-54 and 24% in the 55 and over age group

- 73% of visitors surveyed were from overseas with the UK and Australia comprising the largest numbers. This reflects the pattern for Christchurch and New Zealand as a whole where there has been significant increases in visitor numbers from these countries

3) *Characteristics of Visits to Christchurch*

- The main reasons for visiting Christchurch were for Holiday/Leisure (60%), Visiting Friends and Relations (22%), Business/Attending a Conference (9%) and for English Language Courses (8%)
- The highest proportion of visitors stayed in Hotels (24%), followed by Homes of Friends and Relatives (21%), Youth Hostel/Backpacker (19%), Motel (14%) and Farm/Homestay (11%)
- Over 46% of all visitors stayed four nights or less. Language students (average 155 nights) stayed much longer than other groups and impacted on the average length of stay significantly. The average length of stay for the large Leisure/Holiday market was 8.9 nights for international visitors and 3.4 nights for domestic visitors
- Two forms of transport dominated the responses. Air travel accounted for 55% and car/van/motorcycle 26% as the means of transport to reach Christchurch
- Car parks were used by 10% of those interviewed

4) *Attractions and Places of Interest*

- 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 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
- 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

5) *The Visitor Information Centre (VIC)*

- 57% of those surveyed visited the Visitor Information Centre in Cathedral Square. In terms of Ease of Finding the VIC, 83% rated it as 'Good' to 'Very Good'. In terms of Quality of Service, 80% rated it 'Good' to 'Very Good'. In terms of Usefulness on Information Received, 90% rated it as 'Good' to 'Very Good'
- A number of people commenting on the VIC indicated that lack of signage made it more difficult to find and some had experienced long delays in being served when it was busy.

6) *Visitor Expenditure*

- Visitor expenditure in Christchurch was analysed in five areas. Shopping had the highest spend per person irrespective whether the visitor was from New Zealand or overseas. \$46.23 was the average spend per person per day on shopping for all visitors, with accommodation averaging \$31.65 per day and eating out \$28.13. Entertainment (\$9.39) and travel (\$4.54) were much smaller areas of expenditure.

7) *Visitors' Views and Opinions on Christchurch*

- Opinions were obtained 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 for each attribute evaluated is detailed in the table on the following page.

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

8) *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 (eg 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% 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%), increased bus services (3%). Four respondents specifically suggested no changes – they love it as it is!

9) *Key Actions*

- Take action against the discrimination and abuse of Asian Language students by young local people in the central city
- Provide a safer environment for visitors in the city centre through increased police presence and development of unsafe areas

- Improve road and pedestrian signage for visitors in and around the city and provide maps/information boards so visitors can locate key visitor attractions and facilities
- Increase opening hours for city centre shops and investigate the potential to promote a Shopping Festival in Christchurch targeted at the South Island in particular
- Increase the number of public toilets in the city centre and promote their location
- Increase the range and quality of evening entertainment to meet the needs of visitors who indicate that there is little to do in the city at night
- Improve the signage for the Visitor Information Centre, so that it is easier to find for visitors
- Provide a solution to the long wait that some visitors have in the Visitor Information Centre during busy periods
- Because many people visit other parts of Canterbury during their Christchurch stay, develop touring routes based on specific themes (history/heritage, cultural, nature, adventure etc) that encourage visitors to stay longer
- Work with other RTOs in the South Island, particularly Queenstown, to develop joint marketing strategies as over 60% of the people visiting Christchurch also visit Queenstown

1 INTRODUCTION

1.1 Background

This report represents the findings of a survey of visitors to Christchurch undertaken between late March and April 2001. The survey was commissioned by Christchurch & Canterbury Marketing Limited (CCML) and undertaken by The Tourism & Leisure Group Limited.

This was the first survey of its kind in New Zealand¹ and was the result of previous studies prepared for CCML that identified a shortfall in information on behaviour of visitors to Christchurch. In addition, the survey included a number of standard questions to explore visitors' views and opinions on the strengths and weaknesses of Christchurch as a visitor destination and specific aspects of the visitor experience.

The intention is to undertake surveys with other major tourist destinations in New Zealand, in order that information can be centrally located and analysed to enable comparison of results between destinations. This will provide information on under-performing facilities and services and encourage improvements to enhance visitor satisfaction. It is recommended that each destination undertakes this study every two years to ensure that its performance is at least maintained and hopefully improved.

1.2 Objectives

- a) To collect up to date information on the origin, profile, behaviour and opinions of visitors to Christchurch to improve understanding of tourism and provide the basis for a strategic approach to the development of tourism policies.
- b) Where possible, to identify emerging trends so that more informed decisions can be made in relation to new marketing initiatives and facility provision.
- c) To provide information on the average level and composition of visitor expenditure in Christchurch to assist in determining the economic impact of tourism in the City

¹ More than 40 cities are currently involved in Destination Benchmarking in the UK

1.3 Methodology

To meet these objectives a face to face questionnaire survey was carried out by trained interviewers between 31st March and 29th April 2001. Adults (over 15 years) were sampled on a random basis in four specifically identified central city locations (Cathedral Square, Worcester Boulevard, Cashel Street Mall and Victoria Square).

28 interviewing sessions, each lasting between 5 and 6 hours (11.00am to 5.00pm), were undertaken over 28 days including the Easter school holidays, resulting in a total of 578 completed questionnaires. While the survey obtained individual responses, this represented 1,100 visitors because of the size of the group in which the respondent was travelling. Filter questions were used to exclude Christchurch residents, those living within one hours drive time of the City, those on day visits concerned with their normal work, study or regular/household shopping and visitors to Christchurch who had been in the City less than 24 hours. A total of 3,223 people were stopped for the survey. 1,344(42%) declined to be interviewed, 1,301(40%) did not meet the criteria and the interviews were closed. The 578 completed questionnaires were obtained from 18% of those stopped.

Applying the normally accepted 95% level of confidence, the margin of error for a survey finding of 50% is +/-4.1% based on a sample of 578. Where the sample size is low, generally less than 100 visitors, this is acknowledged in the report and care should be taken in using these figures in any further analysis.

1.4 Presentation of Results

Key findings are presented under eight main headings:

- Profile of visitors
- Origin of visitors
- Characteristics of the visit
- Visitor attractions and places of interest
- The Visitor Information Centre
- Visitor expenditure in Christchurch
- Visitors' opinions
- Key areas for action

Key findings generally refer to all visitors, although commentary is provided where there is significant difference between visitor types. Where appropriate the results are for the total number of visitors in the group not just the person surveyed. In other cases the results indicate the response from the person interviewed which may not reflect the views of other group members.

1.5 Destination Benchmarking

Over recent years the Southern Tourist Board (STB) of the English Tourism Council has undertaken pioneering work in the field of Destination Benchmarking and The Tourism & Leisure Group Limited has obtained exclusive rights to use the methodology in New Zealand and Australia. The methodology is based on obtaining the opinions of visitors, via face to face interviews, on a wide range of factors or indicators which together comprise the 'visitor experience', eg the quality of local accommodation, restaurants and attractions, ease of finding their way around, cleanliness of streets. Indicator scores are then compared to identify relative performance and best practice. Comparisons are also possible in terms of other indicators relating to visitor behaviour, including average length of stay, expenditure and level of use of facilities and services.

A key feature of the Destination Benchmarking service is the use of a standard methodology, in terms of interviewing, sample size, questionnaire design and reporting.

1.6 Definitions

For the purposes of this report, visitors to Christchurch were divided into three main types:

'Day visitors from home' - visitors who had travelled from and were returning to homes outside the one hour drive time on the day of their visit

'Day visitors on holiday' - visitors travelling to Christchurch for the day from holiday bases outside Christchurch

'Staying visitors' - visitors staying overnight in accommodation in Christchurch

2 PROFILE OF VISITORS

2.1 Visitor Type

Table 1 indicates that very few visitors either travelled from home or were day visitors staying in another location outside the one hour driving time criteria. This indicates very strongly that Christchurch is the 'hub' for Canterbury, with most visitors staying in the city and travelling to other locations. This is supported by the International Visitor Survey undertaken by Tourism New Zealand which indicates that 95% of all visitors to Canterbury stay in Christchurch. It also suggests that those visitors to other destinations in Canterbury tend to remain where they are staying.

Table 1: Visitor Type - By Survey Period (2001)

<i>Base No: 1,100 visitors</i>	<i>%</i>	<i>Count</i>
Day visitors from home	0.1	1
Day visitors on holiday	1.5	17
Staying visitors	98.4	1082
Total	100.0%	1100

Visitors were interviewed on 19 weekdays (not Good Friday), 5 Saturdays and 4 Sundays (not Easter Sunday). An average of almost 21 interviews per day was completed and the visitors in Table 2 represent these.

Table 2: Visitors - By Day of the Week (2001)

<i>Base No: 1,100 visitors</i>	<i>Day of the Week</i>					
	<i>Weekday</i>		<i>Saturday</i>		<i>Sunday</i>	
	<i>%</i>	<i>Count</i>	<i>%</i>	<i>Count</i>	<i>%</i>	<i>Count</i>
Visitors	67.1	738	19.3	212	13.6	150

2.2 Group Size and Composition

93% of groups encountered contained adults only. The remaining 7% of groups had children under 16 years of age.

Table 3: Group Composition (2001)

<i>Base No: 571 interviews</i>	<i>Groups</i>	
	<i>Count</i>	<i>%</i>
Adults Only		
1 Adults	232	40.6
2 Adults	245	42.9
3 Adults	32	5.6
4 Adults	18	3.2
5+ Adults	6	1.1
<i>Sub total</i>	533	93..3%
One Adult with		
1 Child	3	0.5
2 Children	2	0.4
3+ Children	0	0.0
Two Adults with		
1 Child	8	1.4
2 Children	14	2.5
3+ Children	1	0.2
Three Adults with		
1 Child	4	0.7
2 Children	1	0.2
3+ Children	2	0.4
Four + Adults with		
1+ Children	3	0.5
<i>Subtotal</i>	38	6.7%

The proportion of children to adults (Table 4) is similar to that for international visitors to New Zealand. There are no comparable figures for domestic tourism in any other studies for Christchurch or Canterbury

Table 4: Proportion of Adults and Children - By Visitor Type (2001)

<i>Base No: 1,089 visitors</i>	<i>%(count) of Total People</i>	
	<i>Adults</i>	<i>Children</i>
Day visitors from home	0.1 (1)	0.0 (0)
Day visitors on holiday	1.5 (16)	0.1 (1)
Staying visitors	91.7 (999)	6.6 (72)
Total	93.3% (1016)	6.7% (73)

The average size of groups (adults and children) was 1.9 people. This varied between 1.9 for Staying Visitors and 2.1 for Day Visitors on Holiday. Adult (only) Staying Visitors formed the smallest group with an average of 1.8 people.

Table 5: Average Group Size - By Visitor Type (2001)

<i>Base No: 1,089 visitors</i>	<i>Average Number of People Per Group</i>		
	<i>Adults</i>	<i>Children</i>	<i>Total</i>
Day visitors from home	Insufficient sample size		
Day visitors on holiday	2.0*	0.1*	2.1*
Staying visitors	1.8	0.1	1.9
Total	1.8	0.1	1.9

* Low sample size

2.3 Age Profile

The age profile of the people surveyed reflects a wide range of visitors with a higher proportion of younger visitors, 16 – 34 years (45%).

Table 6: Age Profiles (2001)

<i>Base No: 1,089 visitors</i>	<i>Day Visitors from Home</i>	<i>Day Visitors on Holiday</i>	<i>Staying Visitors</i>	<i>Total</i>
	<i>% (count)</i>	<i>% (count)</i>	<i>% (count)</i>	<i>% (count)</i>
0-15 Years	-	5.9 (1)	6.7 (72)	6.7 (73)
16-24	-	35.3 (6)	20.9 (224)	21.1 (230)
25-34	100 (1)	29.4 (5)	23.6 (253)	23.8 (259)
35-44	-	23.5 (4)	10.8 (116)	11.0 (120)
45-54	-	5.9 (1)	13.5 (145)	13.4 (146)
55-64	-	-	12.7 (136)	12.5 (136)
65+	-	-	11.7 (125)	11.5 (125)
Total	100% (1)	100% (17)	100% (1071)	100% (1089)

3 ORIGIN OF VISITORS

3.1 Place of Residence

Table 7: Place of Residents by Region (2001)

<i>Base No: 289 visitors</i> Region	<i>All Visitors</i>	
	% (count)	NZDTS 1999 (%) Overnight Trips to Canterbury
Canterbury	2.4 (7)	40.1
Otago	9.0 (26)	14.3
Nelson	6.9 (20)	5.9 (a)
Rest of South Island	12.1 (35)	19.2
Auckland	24.6 (71)	9.2
Wellington	19.4 (56)	6.0
Rest of North Island	25.7 (74)	5.0
Total New Zealand	100% (289)	100%
<i>Base No: 808 visitors</i> Country	% (count)	IVS 2000 (%) Visitors to Christchurch
UK	25.1 (203)	12.9
Australia	22.3 (180)	21.6
USA	9.5 (77)	14.5
Japan	8.2 (67)	14.5
China	5.5 (44)	N/A
Thailand	4.5 (36)	1.4
Germany	3.7 (30)	4.5
Other Countries	21.2 (171)	30.6
Total International	100% (808)	100%

(a) Includes Tasman

The low number of people from Canterbury in comparison with the NZDTS (1999) can be explained by the fact that many Canterbury visitors would have been excluded because they live within one hours travel time or were on a regular shopping trip. Also the NZDTS includes all trips within Canterbury not just Christchurch. The two year difference in the period between this survey and the NZDTS may also explain why the Auckland and Wellington numbers are higher. In the last two years the economy has improved and other surveys such as the Commercial Accommodation Monitor (Statistics New Zealand) shows increased growth from the North Island during this period.

The number of people interviewed from USA and Japan was less than the proportion that visit Christchurch according to the IVS. This was probably because many of these visitors would have been travelling in large groups on packaged holidays and therefore less likely to be interviewed.

3.2 Location of Accommodation - Day Visitors on Holiday

As indicated in Section 2 the number of Day Visitors on Holiday (visitors travelling to Christchurch for the day from holiday bases outside Christchurch) surveyed was very small. In the main this was due to the fact that Christchurch acts as a ‘hub’ for Canterbury, with many people basing themselves in the city and travelling on day trips to other destinations. With the exception of two locations, Palmerston North and Murchison, all the other locations were in Canterbury (Table 9).

Table 9: Location of Accommodation - Day Visitors on Holiday (2001)

<i>Base No: 17 Visitors</i>	<i>Count</i>
<i>Location</i>	
Halswell	1
Hanmer Springs	1
Lincoln	2
Murchison	1
Oxford	2
Palmerston North	4
Rangiora	2
Waipara	4
Total	17

3.3 Type of Accommodation Used

Almost 80% of visitors were staying in commercial accommodation (Table 10) with the remainder staying with Friends or Relations. In the commercial accommodation sector Hotels with almost 24% was the single largest category followed by Youth Hostel/Backpacker (19%) and Motels (15%).

Table 10: Type of Accommodation Used (2001)

<i>Base No: 1,082</i>	<i>Staying Visitors</i>	
	<i>%</i>	<i>count</i>
Hotel	23.9	259
Motel	15.1	163
Farm/home stay	10.6	117
Rented home/time share	2.1	23
Luxury lodge	0.0	0
Caravan park	2.8	32
Camping ground	1.0	11
Youth hostel/backpacker	19.2	208
Private home of friend/relative	20.2	226
Motor home	1.6	17
Other	3.5	38
Total	100%	1082

4 CHARACTERISTICS OF VISIT

4.1 Reason for Visit

Over 79% of domestic visitors to Christchurch are on holiday or visiting friends and relatives. For international visitors to Christchurch over 82% are on holiday or visiting friends and relatives (Table 11). The results for the survey are comparable with the New Zealand Domestic Travel Study 1999 (NZDTS) to Canterbury and the International Visitor Survey (IVS) to Christchurch, which are included in Table 11.

Table 11: Main Reason for Visiting Christchurch (2001)

	<i>Domestic Visitors</i>	<i>NZDTS 1999 (Cant)</i>	<i>Inter- National Visitors</i>	<i>IVS Yr Ending Dec 2000 (Chch)</i>
<i>Base No;</i> 1,097 visitors	<i>% (count)</i>	<i>%</i>	<i>% (count)</i>	<i>%</i>
Leisure/holiday	35.5 (103)	42.9	68.9 (556)	79.3
Visiting friends or relatives	44.1 (128)	33.1	13.8 (111)	8.9
Shopping trip (special/ non regular)	3.4 (10)	Not listed	-	-
Business/attending a conference	16.9 (49)	17.0	6.2 (50)	6.6
Language student	-	-	10.9 (88)	-
Other	-	9.1	0.2 (2)	5.2
Total	100% (290)	100%	100% (807)	100%

4.2 Length of Stay in Christchurch

4.2.1 Staying Visitors

Because there are many factors that influence the average length of stay of visitors to Christchurch, a number of tables have been produced in this section, to show the impact of the influences. The categories of accommodation include commercial and non-commercial and therefore any comparison with other surveys (Commercial Accommodation Monitor and IVS) is not appropriate. This is the only survey for Christchurch that incorporates domestic and international visitors, commercial and non-commercial facilities and therefore provides a unique picture of the Christchurch accommodation market.

Table 12 details the length of stay for all Staying Visitors in the survey (domestic and international). It excludes visitors who indicated that they were staying more than one year. It indicates that 46.5% stay 4 nights or less.

Table 12: Number of Nights Spent in Christchurch - Staying Visitors (2001)

<i>Base No: 1,082 visitors</i>	<i>%</i>	<i>Count</i>
One	2.8	30
Two	24.6	266
Three	19.1	207
Four	10.6	115
Five	7.2	78
Six	5.8	63
Seven	4.9	53
Eight-Fourteen	9.0	97
Fifteen +	16.0	173
Total	100%	1082

Table 13a identifies the length of stay (nights) by the accommodation type for international and domestic visitors who stayed less than one year (<=365).

Table 13a: Average Length of Stay in Christchurch - by Type of Accommodation (2001)

Visitors Staying Less than One Year

<i>Base No: 1,082 visitors</i>	<i>Average Length of Stay (Nights)</i>
Hotel	3.8
Motel	3.5
Farm/home stay	86.9
Rented home/time share	44.0*
Caravan park	3.8*
Camping ground	2.9*
Youth hostel/backpacker	9.5
Private home of friend/relative	17.0
Motor home	2.7*
Other	132.0*

* Low sample

The average length of stay for visitors in Farm/HomeStay, Rented Home/Timeshare and Other is influenced by the Language Students who tend to use these types of accommodation.

Table 13b identifies the length of stay (nights) by the accommodation type for international and domestic visitors who stayed less than 90 nights (<=90).

Table 13b: Average Length of Stay in Christchurch - by Type of Accommodation (2001)

Visitors Staying Less than 90 Nights

<i>Base No: 1,032 visitors</i>	<i>Average Length of Stay (Nights)</i>
Hotel	3.8
Motel	3.5
Farm/home stay	24.6
Rented home/timeshare	20.5*
Caravan park	3.8*
Camping ground	2.9*
Youth hostel/backpacker	6.1
Private home of friend/relative	10.8
Motor home	2.7*
Other	28.3*

* Low sample

By reducing the qualifying group to visitors staying less than 90 days, which will include a high proportion of the visitor market, the average length of stay for Farm/Homestay, Rented Home/Timeshare, Youth Hostel/Backpacker and Private Home reduces significantly. At the same time the length of stay for Hotels, Motels, Caravan Parks, Camping Grounds and Motor Homes remains the same.

Table 13c identifies the length of stay (nights) by the accommodation type for international and domestic visitors (minus the Language Students) who stayed less than one year (≤ 365).

Table 13c: Average Length of Stay in Christchurch - by Type of Accommodation (2001)

Visitors Staying Less than One Year and Excluding Language Students

<i>Base No: 1,002 visitors</i>	<i>Average Length of Stay (Nights)</i>
Hotel	3.8
Motel	3.5
Farm/home stay	11.3
Rented home/timeshare	29.4*
Caravan park	3.8*
Camping ground	2.9*
Youth hostel/backpacker	7.7
Private home of friend/relative	15.8
Motor home	2.7*
Other	85.6*

* Low sample

Excluding Language Students reduces the average length of stay for the types of accommodation most used by them, but retains the same results for the other categories.

Table 13d identifies the length of stay (nights) by the accommodation type for international and domestic visitors (minus the Language Students) who stayed less than 90 nights (≤ 90).

Table 13d: Average Length of Stay in Christchurch - by Type of Accommodation (2001)

Visitors Staying Less than 90 Nights and Excluding Language Students

<i>Base No: 985 visitors</i>	<i>Average Length of Stay (Nights)</i>
Hotel	3.8
Motel	3.5
Farm/home stay	11.3*
Rented home/timeshare	20.0*
Caravan park	3.8*
Camping ground	2.9*
Youth hostel/backpacker	6.1
Private home of friend/relative	10.6
Motor home	2.7*
Other	24.8*

* Low sample

This table (13d) identifies the more likely length of stay scenario for visitors on holiday and reduces the impact of Language Students and Others who are less likely to behave in the same way as Leisure/Holiday visitors.

Table 14a: Average Length of Stay in Christchurch - by Reason for Visit (2001)

Visitors Staying Less than One Year

<i>Purpose</i>	<i>Average Length of Stay (Nights)</i>
<i>Domestic Visitors</i>	
Leisure/holiday	3.4
Visiting friends & relatives (VFR)	10.7
Shopping trip (special)	3.9*
Business/conference	8.0*
<i>International Visitors</i>	
Leisure/holiday	8.9
VFR	19.6
Business/conference	20.3*
Language student	155.4

* Low sample

Table 14a identifies the wide range, in terms of length of stay by purpose of visit, for domestic and international visitors. This confirms that identifying the average length of stay for all visitors is an irrelevant exercise, as it distorts the true picture for the individual markets which operators should focus on.

Table 14b: Average Length of Stay in Christchurch - by Reason for Visit (2001)

Visitors Staying Less than 90 Nights

<i>Purpose</i>	<i>Average Length of Stay (Nights)</i>
<i>Domestic Visitors</i>	
Leisure/holiday	3.4
VFR	7.2
Shopping trip (special)	3.9*
Business/conference	8.0*
<i>International Visitors</i>	
Leisure/holiday	4.9
VFR	13.7
Business/conference	16.2*
Language student	90.0

* Low sample

Table 14b indicates a reduction in the domestic market for VFR from 10.7 nights to 7.2 nights. For international visitors, all markets reduce which indicates that, a wide range of international visitors to New Zealand, are staying more than 90 nights.

4.3 Main Form of Transport Used

Table 15 identifies the Main Form of Transport used by visitors to reach Christchurch. The major transport forms used were air (55%) and car/van/motorcycle (26%). This emphasises the importance of the Christchurch International Airport as an entry point for the city. It is currently bringing into New Zealand 22% of all international visitors. It also indicates the growing trend to Free and Independent Travellers (FIT) and the need to ensure that our roading systems can cope with the increasing number of cars and motor homes in particular.

Table 15: Main Form of Transport (2001)

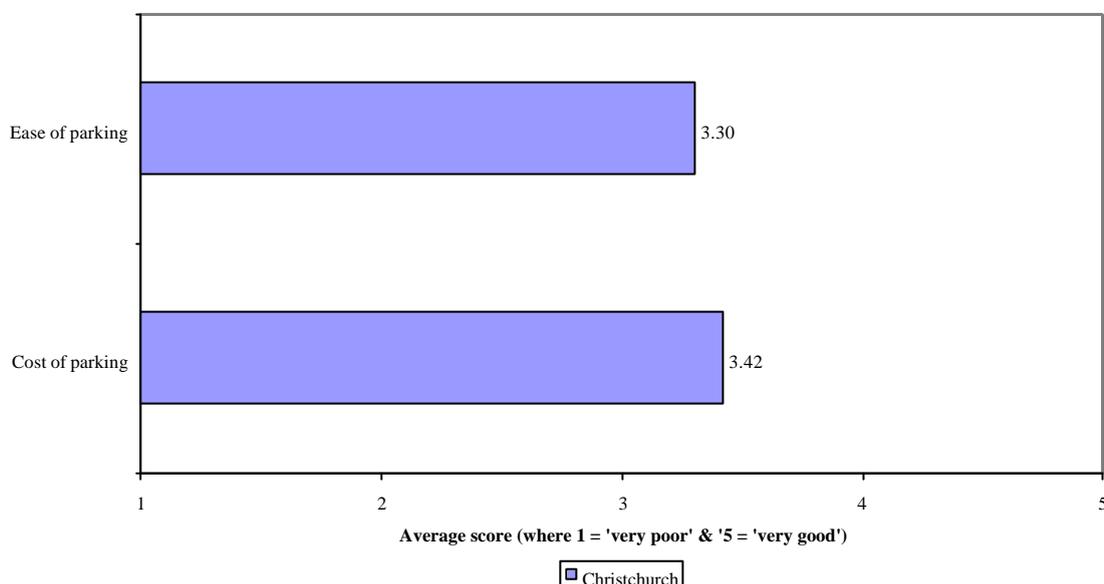
	<i>All Visitors</i>
<i>Base: 1,098 visitors</i>	<i>% (count)</i>
Car/van/motorcycle	26.1 (286)
Motorhome	3.1 (34)
Air travel	54.6 (600)
Bus/coach service	7.7 (85)
Coach tour	5.0 (55)
Train	2.3 (25)
Other	1.2 (13)
Total	100% (1098)

4.4 Car Parking

4.4.1 Ease of Finding and Cost

Visitors were asked if they had used any city centre car parks, how easy they found it to park and how they rated the cost of parking. The visitors scored their responses on a scale of 1 to 5 (see table below. 10% (56) of those interviewed used car parks. The scores of 3.3 and 3.42 indicate an average response.

Figure 1: Visitor Opinions on Car Parking



	% in Each Category				
Ease of finding <i>Responses: 56</i>	1 Very difficult 11%	2 Quite difficult 23%	3 Average 11%	4 Quite easy 36%	5 Very easy 20%
Cost of parking <i>Responses 38</i>	1 Very expensive 3%	2 Quite expensive 5%	3 About average 50%	4 Reasonable 32%	5 Very reasonable 11%

Views on the 'Ease of Finding' were split relatively evenly across all categories, whereas for the 'Cost of Parking' there was a distinct trend towards the average. This suggests that the signage and/or promotion of car parks for visitors could be improved. This is supported by comments from visitors detailed in suggested improvements (Section 7.15).

4.5 Attractions Visited or Intended to Visit

4.5.1 Christchurch Attractions

The percentage of visitors who had visited or said that they were intending to visit, each of the main attractions and places of interest in Christchurch is shown for all visitors in Table 16. There is a spread of visits across a broad range of activities and attractions, with Cathedral Square (80%) being the most visited attraction and Nga Hau e Wha Marae (3%) the least visited. The central city attractions of the Botanic Gardens (67%), The Arts Centre (66%), Christchurch Cathedral (47%), Canterbury Museum (39) and the Christchurch Tram (30%) together with Shopping (71%) are the most popular. The fact that many of these attractions are of high quality and are also free increases their ability to attract visitors. The results clearly show the impact of the central city on visitors and this is strongly supported in ‘What they liked most about the city’ – Section 7. The results also suggest that attractions away from the city centre have a more demanding task in attracting visitors.

As other sections will show in the report, the central city area is the key drawcard for visitors and supports the Council investment (Worcester Boulevard, Botanic Gardens, parks and gardens) in ensuring that the area is developed and maintained to the highest standard.

On average, each visitor during their stay in Christchurch visited more than five attractions/places of interest.

Table 16: Christchurch Attractions Visited or Intended to Visit (2001)

<i>Base Number:</i> 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
Orana Park	9	96
Mona Vale	9	100
Airforce World	5	55
Science Alive	5	55
Ferrymead Historic Park	4	42
Nga Hau e Wha Marae	3	28
Willowbank Wildlife Reserve	2	113

4.5.2 Destination Visited Elsewhere in Canterbury

In addition to asking visitors to identify the attractions and activities undertaken in Christchurch, visitors were asked which places they had visited or intended to visit in Canterbury (Table 17). They were also asked whether they intended to visit Queenstown and Dunedin. The purpose of obtaining the last two responses was to provide information on whether visitors were undertaking a more extensive visit to the South Island. If this was the case, it could be important for the marketing of the South Island, particularly in cooperation with other Regional Tourism Organisations.

Akaroa (37%), Mount Cook (37%) and Kaikoura (36%) were the most visited Canterbury destinations along with Lake Tekapo (33%) and Arthurs Pass (31%). At a slightly lower level Lyttelton (29%), Hanmer Springs (27%), Timaru (24%) and Ashburton (22%) were visited by a significant number of visitors. On average visitors to Christchurch went to slightly fewer than four other locations in Canterbury.

The proportion of visitors undertaking a tour to other destinations in the South Island was very significant. Of those people interviewed in Christchurch 62% had been or were intending to visit Queenstown and 46% Dunedin. This indicates very clearly that for many visitors a stay in one destination is not the preferred option. These data confirm the opportunity for cooperative marketing between the regions, particularly Christchurch and Queenstown, as the same people are visiting both destinations.

Table 17: Canterbury Places Visited or Intended to Visit (2001)

	<i>%</i>	<i>Count</i>
<i>Base: 1,100 visitors, 5,149 visits</i>		
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

For the locations in Canterbury it is apparent that certain destinations have a preference with visitors. This preference is based on two factors. One, is that some places are visited (or travelled through) because it is on the way to their final destination. Second, is that the destination is visited because of its attraction and activity attributes. It is the latter that are more important to the destination from an economic perspective, as these visitors are likely to spend more than those passing through.

5 THE VISITOR INFORMATION CENTRE

5.1 Whether Visited the VIC

Of the 578 interviews 57% (329) said they had used the Visitor Information Centre in some capacity.

Table 18: Enquiries to the Visitor Information Centre

	<i>Enquiries</i>
<i>Base No: 329 enquiries</i>	<i>% (count)</i>
Total Number Visited	57% (329)

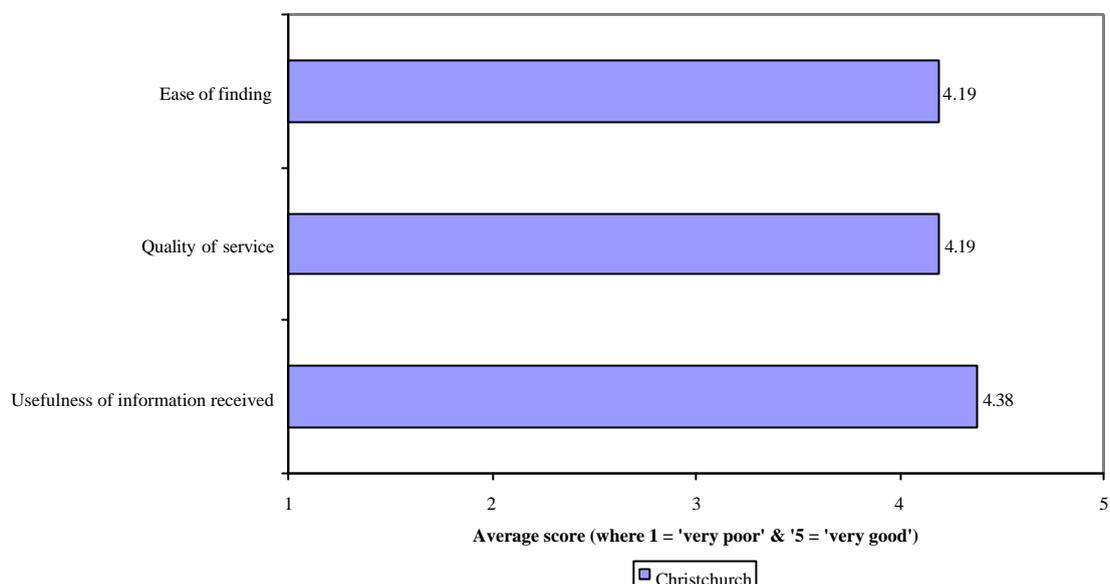
5.2 VIC Location and Service

The visitors who indicated through the survey that they had used the VIC were asked how they rated the centre against three criteria:

- Ease of finding
- Quality of service
- Usefulness of information received

Figure 2 on the following page provides the visitors' average score for each of the criteria and the proportion of scores in each category.

Figure 2: Opinions on Visitor Information Centre



	1 Very poor	2 Poor	3 Average	4 Good	5 Very Good
Ease of finding <i>Responses: 329</i>	1%	5%	11%	40%	43%
Quality of service <i>Responses 315</i>	1%	4%	16%	34%	46%
Usefulness of information received <i>Responses: 317</i>	0%	2%	9%	40%	50%

With average scores between 4.19 and 4.38 the VIC scored extremely well. In over 80% of the responses it rated 'Good' to 'Very Good' for all three criteria and in respect of the 'Usefulness of the Information' received it achieved 90%.

6 VISITOR EXPENDITURE IN CHRISTCHURCH

6.1 Visitors Staying in Christchurch - By Type of Accommodation

Table 19a and Table 19b indicates the average expenditure over a 24 hour period for domestic and international visitors respectively.

Where the survey sample size is indicated as low care needs to be taken with the use of the data.

Table 19a: Average Expenditure in Christchurch - Staying Domestic Visitors by Type of Accommodation Used (\$/person/24 hours) (2001)

<i>Type of Accommodation</i>	<i>Category of Expenditure (\$)</i>					<i>Total</i>
	<i>Accommodation</i>	<i>Shopping</i>	<i>Eating Out</i>	<i>Entertainment</i>	<i>Local Travel</i>	
Hotel	86.48	50.12	51.59	16.22	11.19	215.59
Motel	36.44	38.37	39.69	14.49	7.82	136.81
Farm/home stay	50.28	56.67	22.78	20.50	37.11	187.33*
Rented home/time share	48.20	47.00	43.00	3.00	8.00	149.20*
Caravan park	30.56	46.67	18.33	3.33	9.33	108.22*
Camping ground	14.50	36.67	23.33	3.33	6.67	84.50*
Youth hostel/backpacker	20.51	31.50	20.72	13.80	5.17	91.70
Private home of friend/relative	-	44.65	28.43	4.93	5.92	83.93
Other	23.27	36.71	18.86	1.43	6.57	86.84*

* Low sample

The average daily expenditure of domestic visitors ranges from \$215.59 for Hotel guests to \$83.93 for visitors staying in Private Homes with Friends or Relatives. Shopping at \$43.45 per day and Accommodation at \$42.84 are the highest spending categories.

In comparison expenditure for international visitors detailed on the following page in Table 19b shows similar trends with Shopping the highest category at \$46.23 per day, followed by Accommodation with \$31.65. The larger number of people staying in Youth Hostels/Backpackers reduces the average daily spend in comparison with the domestic market.

Table 19b: Average Expenditure in Christchurch - Staying International Visitors by Type of Accommodation Used (\$/person/24 hours) (2001)

<i>Type of Accommodation</i>	<i>Category of Expenditure (\$)</i>					<i>Total</i>
	<i>Accommodation</i>	<i>Shopping</i>	<i>Eating Out</i>	<i>Entertainment</i>	<i>Local Travel</i>	
Hotel	56.74	61.34	34.85	8.66	3.08	164.67
Motel	37.15	46.19	33.83	7.81	6.73	131.71
Farm/home stay	29.57	36.47	19.62	14.68	3.97	104.33
Rented home/time share	16.07	30.00	11.92	3.85	3.33	65.17*
Caravan park	10.28	65.23	22.73	10.14	1.95	110.32*
Youth hostel/backpacker	20.78	43.63	25.56	10.87	3.71	104.54
Private home of friend/relative	-	32.17	28.99	3.76	8.29	73.20
Other	19.77	46.23	28.13	9.39	1.45	119.95*

* Low sample

6.2 Staying Visitors - By Reason for Visit

6.2.1 Visitor Expenditure

Table 20 on the following page indicates the average expenditure over a 24 hour period for domestic and international visitors by the reason for their visit.

Where the survey sample size is indicated as low care needs to be taken with the use of the data.

Table 20: Average Expenditure in Christchurch for Domestic and International Visitors - by Reason for Visit (\$/person/24 hours) (2001)

<i>Reason for Visit</i>	<i>Category of Expenditure (\$)</i>					<i>Total</i>
	<i>Accommodation</i>	<i>Shopping</i>	<i>Eating Out</i>	<i>Entertainment</i>	<i>Local Travel</i>	
<i>Domestic Visitors</i>						
Leisure/holiday	32.52	40.00	29.73	10.92	7.23	120.42
VFR	38.03	43.52	26.44	8.16	6.42	122.57
Shopping trip (special)	33.91	52.50	38.00	11.43	45.00	180.90*
Business/conference	82.11	48.91	33.13	9.79	8.96	204.99*
<i>International Visitors</i>						
Leisure/holiday	32.95	48.32	28.98	9.97	4.42	124.66
VFR	28.77	45.47	30.24	4.41	5.53	114.42
Business/conference	42.76	75.14	34.79	10.28	6.59	169.55*
Language student	17.02	22.29	15.96	9.59	2.93	67.79
Other	33.33	20.00	35.00	9.39	1.00	176.83*

* Low sample

The expenditure on accommodation for people visiting friends and relations only takes into account those actually staying in commercial accommodation. Generally, there is little expenditure on accommodation as visitors in this category stay with their friends and relatives at little or no cost.

Interestingly the average daily expenditure for the two largest markets (Leisure/Holiday and VFR) is very similar for both domestic and international visitors. Shopping is the highest spending category for domestic and international visitors with Accommodation a close second. Entertainment is relatively low for all markets, which may be a further indication of the popularity of the free central based attractions (eg Botanic Gardens and Arts Centre)

6.3 The Economic Impact of Tourism in Christchurch

Whereas previously the expenditure of visitors to Christchurch has been based on national estimates for international visitors (IVS – International Visitor Survey) and the New Zealand Domestic Travel Study for domestic visitors, the Destination Benchmarking Survey provides visitor expenditure for international visitors to Christchurch. Because there are no domestic visitor numbers for Christchurch (only Canterbury), it is not possible to project domestic visitor

expenditure. Using the Reason for Visit categories and Length of Stay averages combined with the visitor arrivals for international visitors, estimates of direct visitor expenditure in Christchurch can be calculated.

Table 21 uses the information generated from Table 14b (international visitors staying less than 90 days, except for Language Students) and international visitor numbers to Christchurch in 2000. This provides an estimate of total expenditure for Leisure/Holiday, VFR, Business and Language Students in Christchurch for international visitors.

Table 21: Estimated Annual Direct International Visitor Expenditure by Reason for Visit) in Christchurch(2001)

<i>Categories</i>	<i>Average Length of Stay (nights)</i>	<i>Average Daily Expenditure (\$)</i>	<i>Number of Visitors Annually</i>	<i>Total Expenditure (\$)</i>
Leisure/holiday	4.9	124.66	554,585 (2000)	338,760,000
VFR	13.7	114.42	45,768 (2000)	71,744,000
Business	16.2*	169.55	41,940 (2000)	115,197,000
Language students	155.4	67.79	5,000 (est)	52,673,000
Other	Excluded due to low sample numbers			

* Low sample size

7 VISITORS' OPINIONS

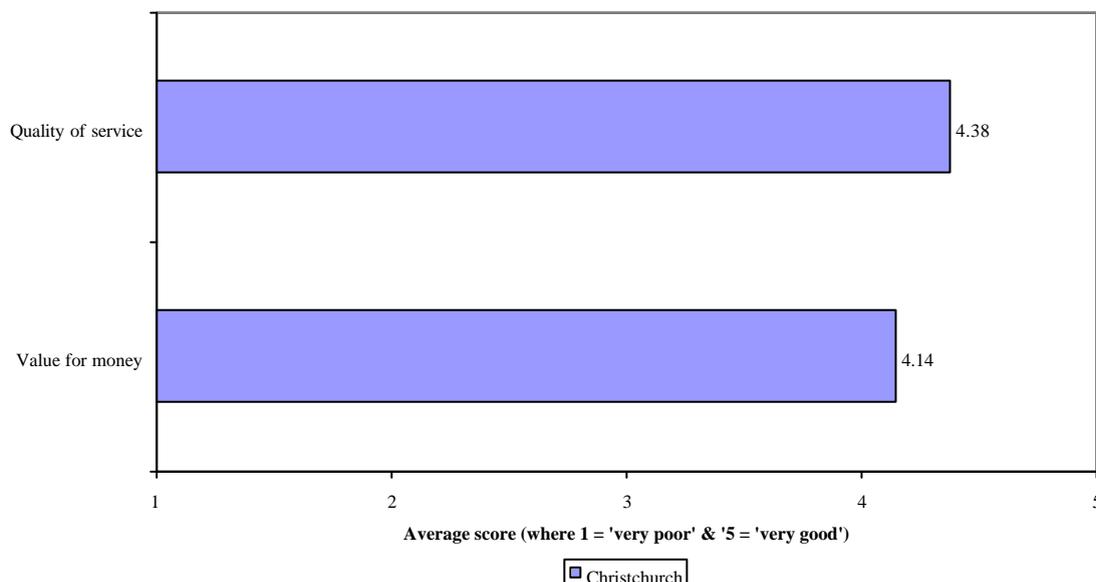
7.1 Introduction

This section provides the views of visitors to Christchurch on a range of key attributes. These are rated on a scale of one to five concerning, in the main, the range quality and value for money of specific services and facilities.

7.2 Accommodation

Visitors to Christchurch were asked to rate their accommodation in terms of quality of service and value for money on a scale of one to five, where 1= 'very poor', 3= 'average' and 5= 'very good'. Average scores (maximum of five) have been calculated on the basis of the responses given (excluding 'no replies').

Figure 3: Visitor Opinions on Accommodation



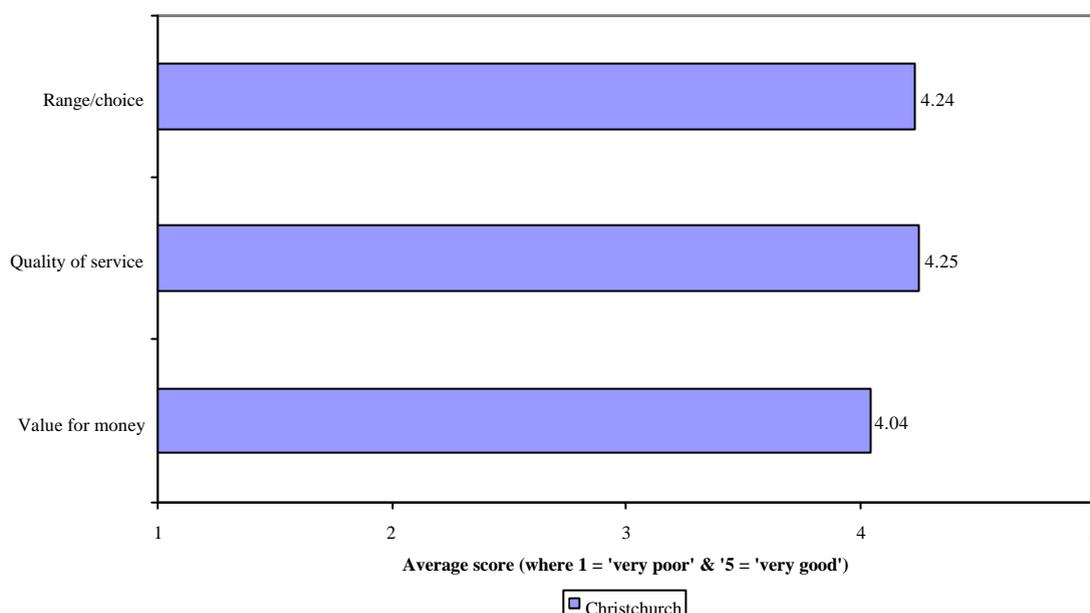
Attributes	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Quality of service <i>Responses: 444</i>	0%	1%	11%	36%	51%
Value for money <i>Responses: 424</i>	0%	2%	21%	39%	39%

Over 80% considered the Quality of Service ‘Good’ or ‘Very Good’ and 78% considered their accommodation ‘Good’ or ‘Very Good’ Value for Money.

7.3 Attractions and Places to Visit

Opinion scores relating to Places to Visit in Christchurch are shown in Figure 4.

Figure 4: Visitor Opinions on Attractions & Other Places to Visit



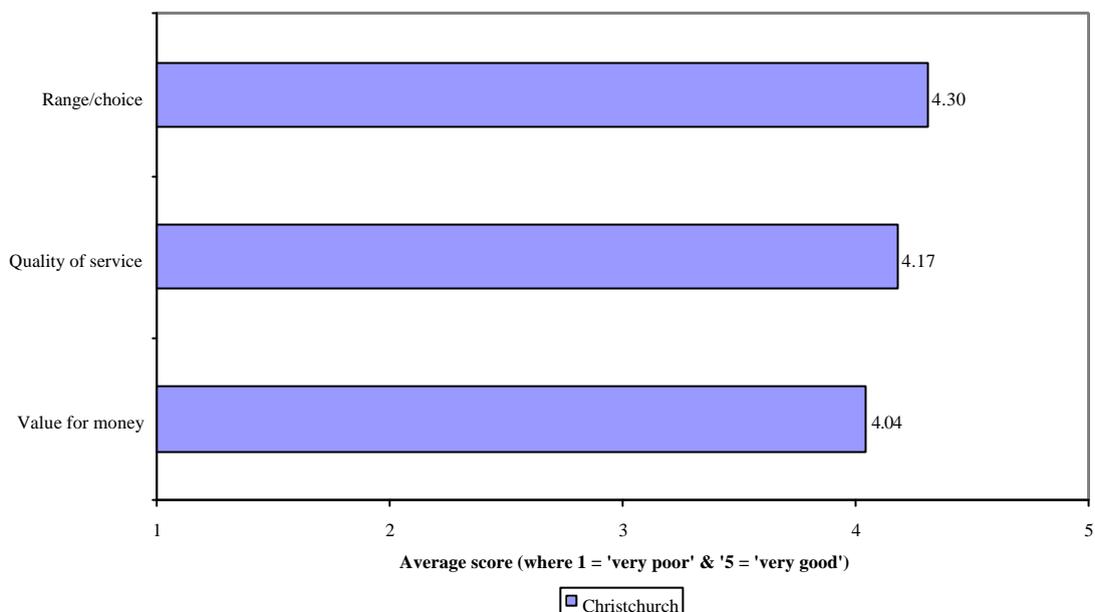
Attributes	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Range/choice <i>Responses: 488</i>	0%	1%	14%	44%	41%
Quality of service <i>Responses: 464</i>	0%	0%	10%	53%	37%
Value for money <i>Responses: 457</i>	0%	2%	22%	46%	30%

All attributes achieved 76% and above in the ‘Good’ to ‘Very Good’ categories, with Range/Choice scoring the highest at 85% in the ‘Good’ to ‘Very Good’ categories.

7.4 Places to Eat and Drink

Opinion scores relating to Places to Eat and Drink in Christchurch are shown in Figure 5.

Figure 5: Visitor Opinions on Places to Eat & Drink



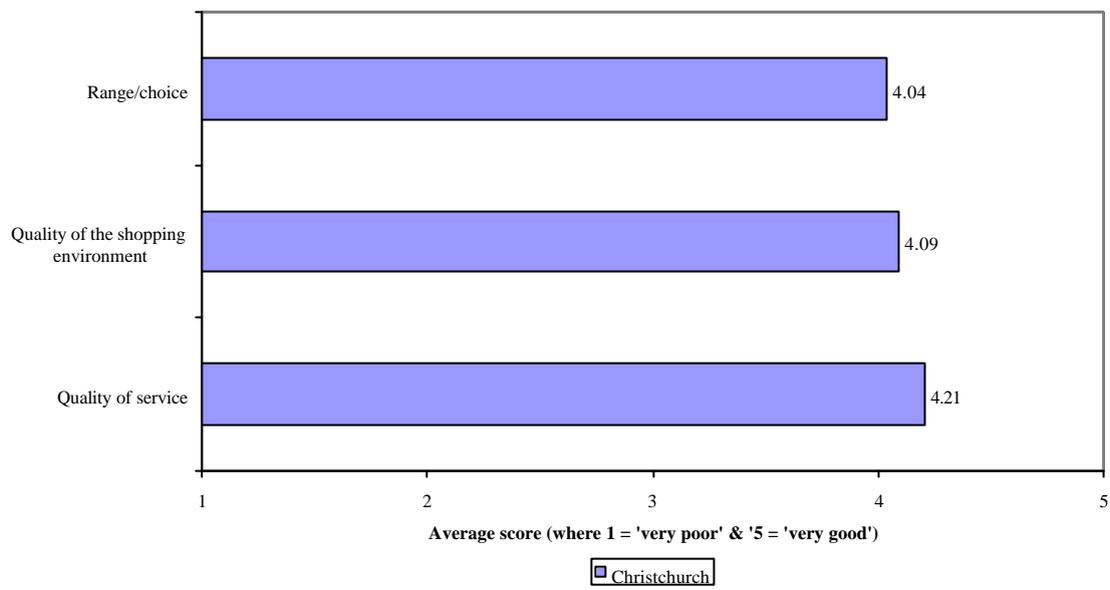
Attribute	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Range/choice <i>Responses: 509</i>	0%	2%	12%	36%	49%
Quality of service <i>Responses: 507</i>	0%	1%	14%	51%	34%
Value for money <i>Responses: 508</i>	0%	3%	22%	44%	31%

All attributes scored 75% or more in the 'Good' to 'Very Good' categories. Range and Quality of Service both scored 85% in the 'Good' to 'Very Good' categories.

7.5 Shops

Opinion scores relating to Shopping in Christchurch are shown in Figure 6.

Figure 6: Visitor Opinions on Shopping



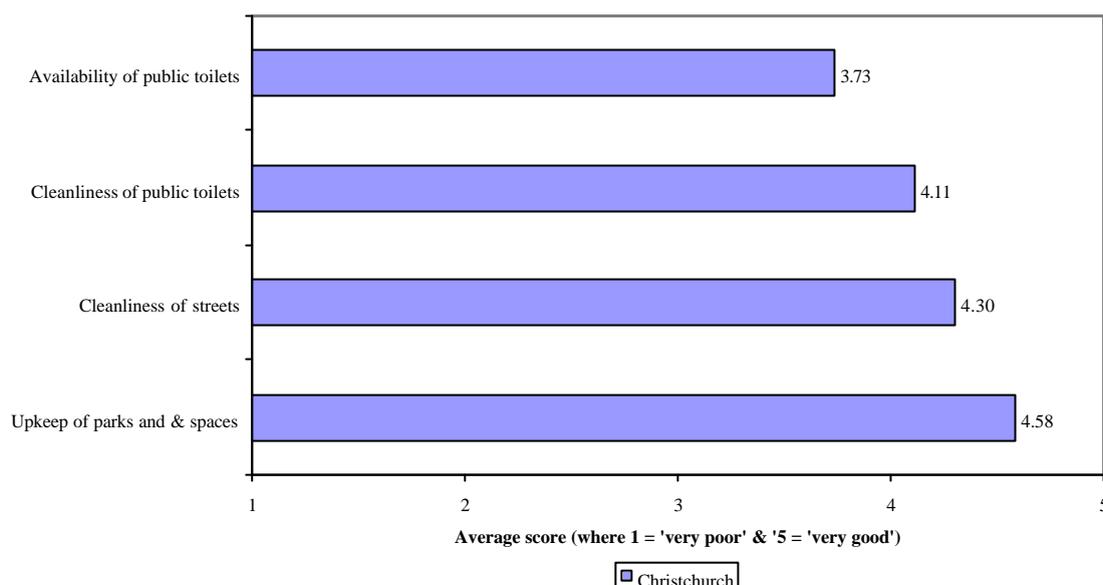
Attribute	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Range/choice <i>Responses: 488</i>	0%	5%	19%	40%	35%
Quality of shopping environment <i>Responses: 484</i>	0%	3%	17%	49%	31%
Value for money <i>Responses: 475</i>	0%	1%	13%	50%	36%

All attributes scored 75% or more in the 'Good' to 'Very Good' categories. The Quality of the Shopping Environment and Quality of Service scored 80% and 86% respectively in the 'Good' to 'Very Good' categories.

7.6 Public Toilets, Cleanliness of Streets and Parks

Opinion scores relating to Public Toilets, Cleanliness of Streets and Parks in Christchurch are shown in Figure 7.

Figure 7: Visitor Opinions on Public Toilets, Streets and Parks



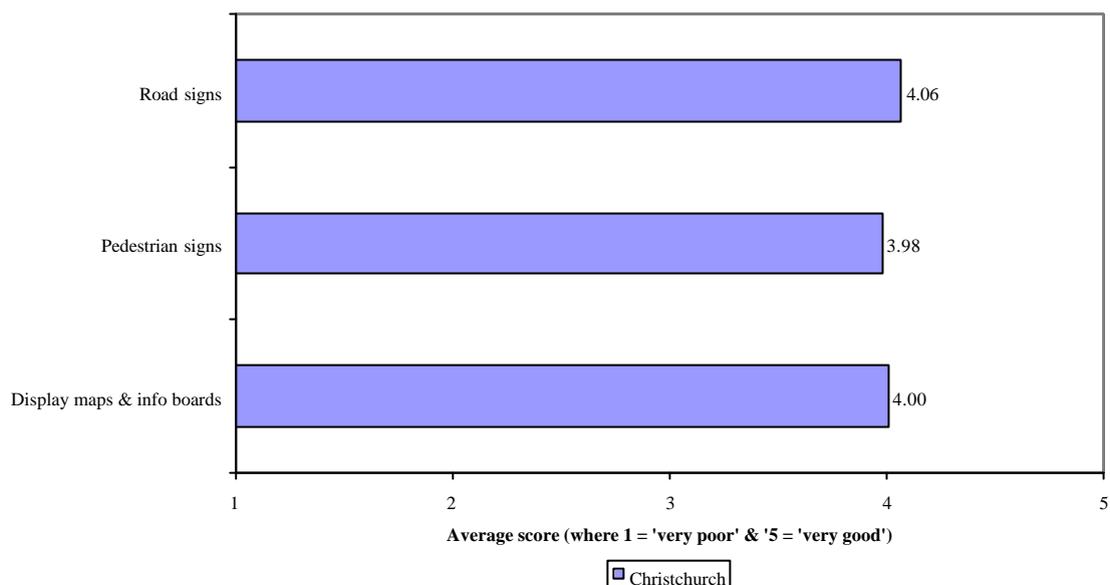
Attribute	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Availability of public toilets <i>Responses: 387</i>	1%	13%	20%	43%	23%
Cleanliness of public toilets <i>Responses: 369</i>	0%	4%	15%	47%	34%
Cleanliness of streets <i>Responses: 566</i>	0%	1%	14%	39%	46%
Upkeep of parks and open spaces <i>Responses: 540</i>	0%	1%	4%	30%	65%

With an average score of 4.5 the Upkeep of Parks and Open Spaces received the highest score of all attributes and 95% of visitors scored it in the 'Good' to 'Very Good' category. The Availability of Public Toilets on the other hand had one of the lower average scores of 3.7

7.7 Ease of Finding Your Way Around

Opinion scores relating to Ease of Finding Your Way Around in Christchurch are shown in Figure 8.

Figure 8: Visitor Opinions on Ease of Finding Way Around



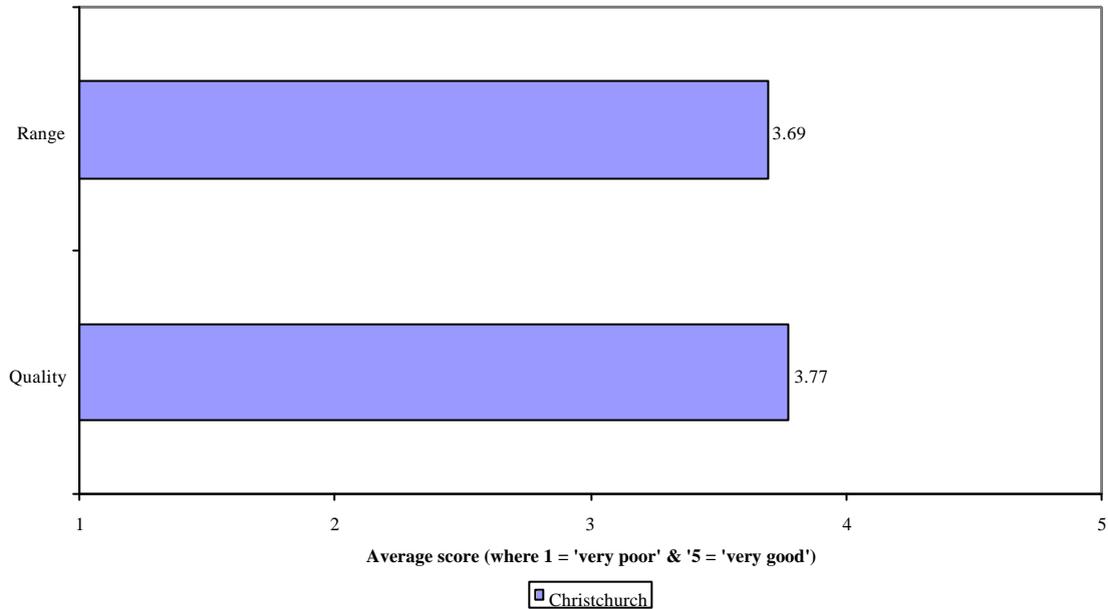
Attribute	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Road signs <i>Responses: 541</i>	1%	5%	17%	39%	37%
Pedestrian signs <i>Responses: 509</i>	0%	5%	20%	47%	28%
Display maps and information boards <i>Responses: 481</i>	1%	6%	18%	40%	35%

While still recording average scores of around 4.0, comments by visitors (Section 7.1) suggest that for many, this is an area of potential improvement.

7.8 Evening Entertainment

Opinion scores relating to Evening Entertainment are shown in Figure 9.

Figure 9: Visitor Opinions on Evening Entertainment



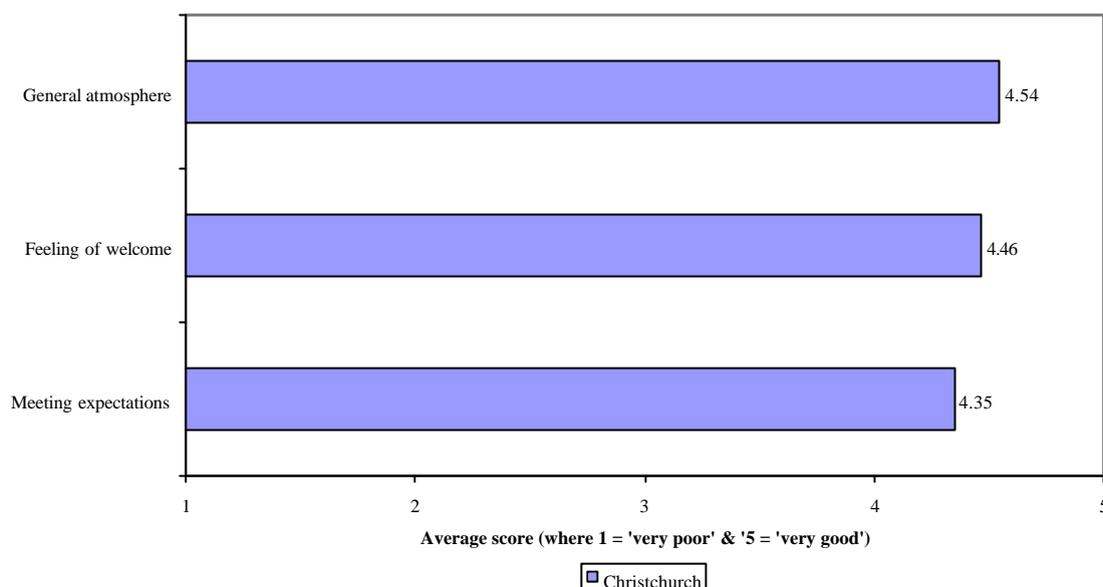
Attribute	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
Range <i>Responses: 256</i>	2%	7%	26%	48%	17%
Quality <i>Responses: 239</i>	1%	4%	27%	53%	15%

The average scores of 3.69 and 3.77 for Range and Quality of Evening Entertainment were two of the lowest scores found. 74% stated the Range was 'Average' to 'Good' and 80% stated the Quality was 'Average' to 'Good'. Comments in Section 7.15 suggest that the availability and quality of Evening Entertainment is an area for improvement.

7.9 Overall Impression of Christchurch

Opinion scores relating to the Overall Impression of Christchurch are shown in Figure 10.

Figure 10: Visitor Opinions on Overall Impression of Christchurch



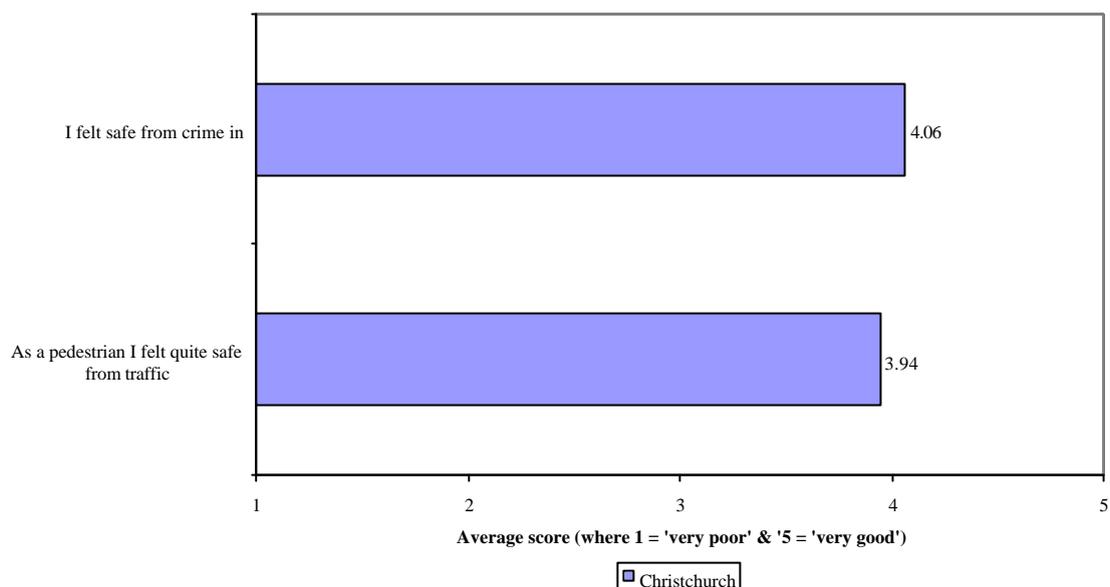
Attribute	1 Very Poor	2 Poor	3 Average	4 Good	5 Very Good
General atmosphere <i>Responses: 561</i>	0%	0%	5%	34%	61%
Feeling of welcome <i>Responses: 564</i>	0%	1%	8%	34%	57%
Meeting expectations <i>Responses: 545</i>	0%	1%	11%	40%	48%

Visitors' opinions regarding the Overall Impression of Christchurch were very positive with all three scores achieving 4.3 and above. 95% considered that the 'General Atmosphere' in Christchurch was 'Good' to 'Very Good' and 88% considered that it met their expectations.

7.10 Feeling of Safety

Opinion scores relating to the Feeling of Safety in Christchurch are shown in Figure 11.

Figure 11: Visitor Opinions on Safety



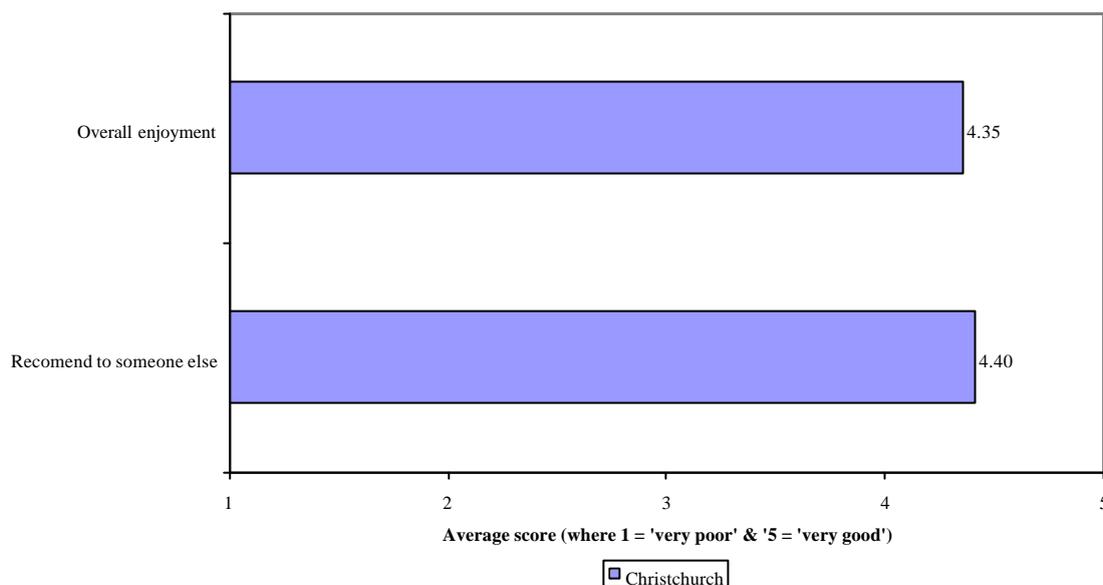
Attribute	1 Disagree Strongly	2 Disagree	3 Neither Disagree nor Agree	4 Agree	5 Agree Strongly
Felt safe from crime <i>Responses: 532</i>	1%	3%	9%	64%	23%
As a pedestrian felt safe from traffic <i>Responses: 561</i>	1%	7%	9%	62%	21%

In general visitors felt safe in Christchurch from both crime and traffic. However the specific comments from visitors in Sections 7.14 and 7.15 identifies a number of issues that require resolution.

7.11 Overall Enjoyment of Visit

Opinion scores relating to the Overall Enjoyment of the Visit to Christchurch and the Likelihood of Recommending the City to Someone Else are shown in Figure 12.

Figure 12: Visitor Opinions on Enjoyment and Recommendation



Attribute	1 Very Low	2 Low	3 Average	4 High	5 Very High
Overall enjoyment <i>Responses: 545</i>	0%	1%	10%	40%	48%
	1 Very Unlikely	2 Unlikely	3 Possibly	4 Likely	5 Very Likely
Likely to recommend Christchurch <i>Responses: 561</i>	1%	1%	11%	32%	55%

88% of visitors rated the enjoyment of their visit as either 'High' or 'Very High' and 87% confirmed that they were 'Likely' or 'Very Likely' to recommend Christchurch to someone else.

7.12 What You Liked Most About Christchurch?

Visitors were asked “What they liked most about Christchurch?” The open ended comments have been collated, coded and ranked and the most common specific responses are listed below in Table 22. Almost 95% (548) of all those surveyed (578) made at least one positive comment regarding Christchurch. Many made two or more positive comments across a range of attributes.

Table 22: What Did You Like Most About Christchurch? (2001)

<i>Base No: 548 visitors</i>		
<i>Attribute</i>	<i>% of Respondents</i>	<i>Number of Respondents</i>
The general environment of Christchurch – streetscape, landscape, parks and gardens	41	237
Friendly atmosphere and people	28	154
Weather/climate	13	73
Buildings and architecture	8	41
Uncrowded and relaxing	7	39
Cleanliness of City	7	37
Accessible/easy to get around	6	32

Specific comments under each category include:

The general environment of Christchurch

- “The Botanic Gardens – remarkable, a beautiful city”

USA visitor

Friendly atmosphere and people

- “The friendliness of the people and the sincerity behind the friendliness”

USA visitor

Weather/climate

- “Cooler weather than Auckland, not humid”

Auckland visitor

Buildings and architecture

- “Its beauty and architecture, especially the buildings”

Canadian visitor

Uncrowded and relaxing

- “You can go for walks in the city without the rush”

Israeli visitor

Accessible/easy to get around

- “Ease of getting around, the layout is very good, nice and open feeling of space”

UK visitor

While many people visited attractions, it is apparent that what visitors like about Christchurch is the layout of the city which enables visitors to explore and the extensive parks and gardens which provide the backdrop for the more obvious tourist attractions. There is ample evidence that the City Council’s investment in the enhancement of the street and landscapes is appreciated by visitors to Christchurch and is a major reason for the many positive comments about the City.

7.13 What, if Anything, Spoilt Your Visit to Christchurch?

Visitors were asked “What if anything spoilt your to Christchurch?” Over 21% (119) of those surveyed (578) made at least one comment in this section. The most common responses are listed in Table 23.

Table 23: What, if Anything, Spoilt Your Visit to Christchurch? (2001)

<i>Base No: 119 visitors</i>		
<i>Factors</i>	<i>% of Respondents</i>	<i>Number of Respondents</i>
Discrimination and abuse of visitors	15	18
Personal safety and security issues	13	16
Service issues – Visitor Information Centre	5	6
Insufficient time in Christchurch	5	6
Shops not open long enough	2	3
Lack of buses	3	4

Specific comments under each category include:

Discrimination and abuse of visitors

- “Sometimes bar owners warned them not to come in because customers don’t like Asians. There might be a fight or argument”
Japanese visitor on a working holiday

Personal safety and security issues

- “Going out at night is dangerous and young Kiwis are not friendly”
Chinese student studying English

Service Issues – Visitor Information Centre

- “Information Centre could be more helpful when booking accommodation – rates from 1997”
Australian visitor

Insufficient time in Christchurch

- “Visit not long enough”
Australian visitor

Shops not open long enough

- “Shops close too early”
Japanese language student

Lack of buses

- “The bus frequency is not good, I missed one on Sunday and had to wait an hour”
Hong Kong visitor

While there was only one negative comment for every five positive there were some disturbing signs. In particular, it appears that English language students from Asia are subject to taunts and abuse. With English Language Schools in Christchurch worth over \$100 million per year (Canterbury Development Corporation) to the Christchurch economy, any negative messages

about the treatment of students taken back to the home countries could have a devastating effect on the future growth of this important tourism sector.

In addition to racial abuse and discrimination personal safety is another major issue. A number of visitors mentioned specific incidents including robbery and attacks. During the period of the survey four incidents of robberies and an attack on visitors were reported in the Christchurch Press. Some of those surveyed specifically identified Latimer Square as an area to be avoided.

While the number of incidents is relatively small, action will need to be taken by the appropriate authorities to stamp out thefts and attacks. Failure to do so could be very damaging for the visitor industry.

The Council's plans to redevelop areas east of Cathedral Square could go some way to reducing crime and providing a safer environment for residents and visitors.

7.14 What Improvements, If Any, Would You Like to See in Christchurch?

Visitors were asked "What improvements would you like to see in Christchurch?" Over 46% (267) of those surveyed (580) made at least one suggestion in this section. The most common responses are listed in Table 24.

Table 24: What Improvements, if Any, Would You Like to See in Christchurch? (2001)

<i>Base No: 267 visitors</i>		
<i>Improvements</i>	<i>% of Respondents</i>	<i>Number of Respondents</i>
Traffic and pedestrian signage in town and on major arterial roads, also maps to show attraction locations	14	37
Upgrade Cathedral Square	10	28
More shops and longer opening hours	8	22
More public toilets	5	14
Access and service from Visitor Information Centre	5	13
Increased bus services	3	7
No changes	1	4

Specific comments under each category include:

Improvements to traffic and pedestrian signage

- “Clear street signs at every intersection”
UK visitor
- “Maps in specific places to help people navigate their way around”
Wellington visitor
- “More pedestrian signs – Botanic Garden signs are good”
Cambodian visitor

Improve the Square

- “More cafes around Cathedral Square, get rid of fast food trailers and replace with cafes”
Irish visitor
- “More colour in the Square, too grey, flower beds too low down, gardens too small, not enough green areas”
Auckland visitor

Toilets

- “More toilets in the city area”
English visitor

Visitor Information Centre

- “Access to visitor centre not very visible”
Australian visitor
- “Visitor Information Centre is crowded and cramped”
Palmerston North visitor
- “Visitor Information Centre needs section for enquiries separate from ticketing”
Australian visitor

The major issue for visitors was the lack of directional and informational signage while coming into Christchurch on the main arterial routes, in town and as pedestrians. A specific study is required to better understand the issues for visitors and to provide workable solutions. The key

agencies (City Council and Transit NZ) will need to work together to develop the solutions required.

In terms of the visibility of the Visitor Information Centre, the City Council has recognised the problem and is working with Christchurch & Canterbury Marketing to prepare appropriate signage. The pedestrian signage to assist visitors to navigate the central city area is essential.

8 KEY AREAS FOR ACTION

Taking into account the very positive comments by most visitors and in general the high scores achieved for the range, quality, service and value for money of facilities and services, Christchurch has performed very well. However, there is always room for improvement and detailed below are the key areas in which action needs to be taken.

Discrimination Against Asian Language Students

- The problem of discrimination needs to be recognised and the key agencies/people involved in this sector encouraged to find solutions and protect this multi million dollar industry. A specific survey of the issues facing language students would assist in understanding their concerns and potentially provide workable solutions.

Personal Safety of Visitors to Christchurch

- While the number of incidents were few they do attract a disproportionate amount of media attention that can be very damaging to the image of Christchurch. Visitors to Christchurch need to be informed of areas that could be considered dangerous at night. In addition there is probably a need for increased police presence in the areas considered unsafe for visitors. Further development of the area east of Cathedral Square and particularly development that encourages inner city living is likely to provide safer areas with the increased presence of people.

Visitor Information Signage

- There were many comments on the lack of road signage and poorly sited road signs, both in the city and on the main highways that caused frustration for visitors trying to find the city centre and specific locations. With more visitors in rental cars and motor homes (Free and Independent Travellers), it is essential that road signage meets the needs of international visitors. A study to identify specific problem signs and sites should be completed by Transit and the City Council with appropriate action for improvement taken.

- Visitors expressed frustration at not being able to find the Visitor Information Centre and also the lack of pedestrian signage and maps to direct visitors to the key attractions in the city centre. A visitor signage study and plan is required for the city centre and the City Council should complete this as soon as possible.

Shopping

- If the central city retailers are to attract the increasing number of international visitors to the city for shopping then they will have to adopt the accepted international standards of opening later and at weekends. With international arrivals to the city projected to increase by 46% to over 950,000 annually by 2005 there is a major opportunity for central city retailers to maximise the potential return from this sector of the visitor industry. Visitor expenditure both for domestic and international visitors clearly indicates that shopping is a major activity and one that can be further developed.

Public Toilets

- Many visitors indicated that there was a lack of public toilets available in the city centre, which is the focus for most visitors. There is an urgent requirement for more facilities, particularly with the new Robert McDougall Art Gallery and the projected increase in international visitors over the next few years likely to encourage more visitors to the city centre. Like the Christchurch Town Hall, it may be appropriate for the new art gallery to provide public toilets for visitors, not only to the gallery, but also to the Worcester Boulevard area.

Evening Entertainment

- The range and quality of evening entertainment received two of the lower scores in the visitors' evaluation of Christchurch. Encouragement should be given by way of designated facilities and planned programmes to increasing the evening entertainment in the city centre. The Council through its investment in entertainment programmes (Summertimes etc) could look to increasing its investment in events that have a specific visitor focus. More events in

the Cathedral Square, Victoria Square, Worcester Boulevard and the City Mall could also have a positive impact on shopping in the city centre.

Visitor Information Centre (VIC)

- While the Visitor Information Centre in its new location has been very successful in attracting increased numbers of visitors, it has also created problems. One of these is the length of time that some people have to wait to be served. Some visitors are using the VIC to plan their complete holiday itinerary, while others are making enquiries requiring a minimum amount of time. A system needs to be designed to meet the different levels of service required, in order that all visitors are satisfied.

Christchurch – The Shopping Centre for the South Island

- From the research, it is apparent that people from outside Christchurch regard the city as an important shopping centre. Some of those surveyed visit Christchurch specifically for shopping and there is potentially an opportunity to build on this interest by promoting Christchurch as the shopping centre for the South Island. This could involve a shopping week, during the low season and possibly as part of the domestic tourism campaign, to encourage people to visit Christchurch to shop. A campaign would need support from travel (airlines and rail), as well as accommodation providers by offering incentives to visit Christchurch. The City Council could provide reduced or free parking for out of town visitors and entertainment venues could promote their programmes during the promotion.

Touring Routes

- With so many visitors to Christchurch also visiting other Canterbury destinations there is an opportunity, particularly for the growing Free and Independent Travellers (FIT) market, to develop touring routes along similar lines to the Alpine Pacific Triangle. These could be day trips or longer to meet the needs of visitors. Resources should include information on attractions to visit, places to stay, possible side trips, journey times and links to other routes to provide extended itineraries. Routes could have specific themes (cultural, historical, food and wine, adventure etc).

Marketing

- The fact that so many visitors to Christchurch are also visiting other parts of the South Island (Queenstown over 60%), confirms the opportunity to work cooperatively with other Regional Tourism Organisations (RTOs) in marketing the regions.

9. APPENDIX 1 – VISITOR COMMENTS

Visitor comments are included in a separate report.