North West Rodney Visitor Strategy Research Programme

Report on findings:

Visitor, Resident and Business Surveys

New Zealand Tourism Research Institute www.nztri.org

October 2014

Rodney Local Board

Acknowledgements

This research was conducted by the New Zealand Tourism Research Institute (NZTRI) at the Auckland University of Technology (AUT) on behalf of the Rodney Local Board (RLB). This report was prepared by Carolyn Deuchar, Suzanne Histen and Simon Milne, with contributions from Tina Buch, Nathaniel Dobbin, and Barbara Neubarth. The work would not have been possible without the input of a variety of stakeholders. NZTRI acknowledges the support of RLB and Auckland Tourism Events and Economic Development (ATEED). We also thank the residents, community groups and businesses of the North West Rodney area who provided resources, attended public meetings, and assisted by communicating information about the Surveys to their visitors, local businesses, neighbours and community networks.

Executive summary

In December 2013 the Rodney Local Board (with support from ATEED) commissioned NZTRI to conduct research to inform the development of a five-year Visitor Strategy for the north-western side of the Rodney Ward.

This report presents the results from the 2014 North West Rodney Visitor, Resident and Business Surveys. The three surveys are designed to provide research insights to underpin the five year visitor strategy. The report draws on survey data collected in 2014 and is based on 587 completed surveys for visitors, 196 for residents and 74 responses to the business survey.

The vast majority (91%) of visitors surveyed are Aucklanders from outside the North West Rodney area (NWR); 8% are from elsewhere in New Zealand, and 1% are from overseas. Of the 98% of visitors who have been to NWR before, just over half (58%) visit once a week or once every 2-3 weeks. Another 29% come once a month or once every 2-3 months. Nearly 90% of visitors surveyed come to the NWR area as part of a day trip – with 45% of these staying for less than half a day in the area.

For the resident survey there was a good representation from all townships within NWR. Nearly 30% of residents surveyed live in Waimauku, with a further third residing in Riverhead, Helensville or Muriwai. One third of businesses surveyed are located in Kumeu with another quarter in Helensville - the remainder are spread across the NWR area. Forty percent of businesses are directly related to the visitor industry; the remainder are associated with retail, professional services, and 'others' such as construction and horticulture. The majority (82%) of business survey respondents are permanent residents of NWR.

Both visitors and residents enjoy the outdoor spaces and recreational activities on offer in NWR. Residents make the most of the numerous recreational opportunities at their doorstep with over 90% participation rates in four broad categories (outdoor activities, food and beverage, events and 'other' activities). While 86% of visitors surveyed participate in outdoor activities, only 54% partake in the area's food and beverage offerings, or attend events (49%). Visitors participate even less (28%) in 'other' activities for example, visiting heritage attractions, museums and galleries, shopping, visiting parks and gardens, and bird watching. In terms of outdoor recreational activities, visitors participate mainly in cycling and mountain biking, a swim at the hot pools, and beach related activities.

As a destination – and as a place to live - NWR is seen by visitors and residents to offer a beautiful natural environment where they can spend time with friends and family participating in outdoor recreational activities. Both enjoy the more peaceful rural environment of the area and an opportunity to escape the frenetic pace of the city; both

appreciate the proximity and easy access to other parts of Auckland. Visitors are generally very satisfied with their experience in NWR regardless of the activities they engage in.

Nine out of 10 visitors purchase goods or services within the NWR area during their visit. The average spend per person if all visitors are included (including those who spend nothing) is $24 per person per day for both overnight visitors and day visitors. Thus for every 10,000 visitor days in the region $240,000 is generated for the local economy.

Residents were asked to list the most positive impacts associated with visitors coming to NWR, with economic benefits, and improvement to infrastructure and facilities, being most commonly noted. Forty one percent of residents surveyed felt the visitor industry has a positive impact on their quality of life with the remainder feeling ambivalent about the impact (48%) - only a small percentage (11%) felt visitors had a 'very negative' or 'negative' impact. The majority of resident respondents feel that visitors are good for the region's economy and that visitors coming to the region stimulate employment opportunities for residents.

One third of the businesses surveyed receive the majority of their revenue directly from visitors. Business respondents in general believe it is important to attract more Aucklanders and domestic visitors and increase visitor spend. The majority (71%) of business respondents believe that the local economy needs more day visitors. When asked for suggestions on ways in which local businesses could support each other to attract more visitors to the area, comments from respondents were mainly focussed on opportunities to cross-promote and work together.

Respondents to all three surveys are critically aware of the need to manage the development of the visitor industry in a sustainable manner. Residents feel that there are negative factors associated with visitors coming to NWR, with traffic and congestion, pressure on already strained infrastructure and resources, and damage to the environment being the main themes highlighted. For visitors, the least appealing aspects of NWR are roads in poor condition, lack of infrastructure, and environmental issues.

The NWR area is not characterised by very intense levels of business networking and collaboration. Only 7% of respondents strongly agree that local businesses work well together; 34% somewhat agree. Just under half somewhat or strongly agree that local business associations and networks are of benefit to their business. The remainder were mostly ambivalent about the levels of cooperation in NWR and benefits of industry associations and networks.

Ngāti Whātua o Kaipara want to gauge interest in experiences that share their tribal heritage and culture. Residents have a higher level of interest in potential cultural tourism offerings being developed by Ngāti Whātua o Kaipara (61% of respondents) than visitors (17%). The majority of Business respondents (73%) generally agreed that a visitor experience/tourism offering of this nature would be of benefit to NWR's economy.

Nearly all visitors (98%) are happy to recommend NWR as a destination, they see it as a place offering a diverse array of experiences that can't easily be found elsewhere Auckland.

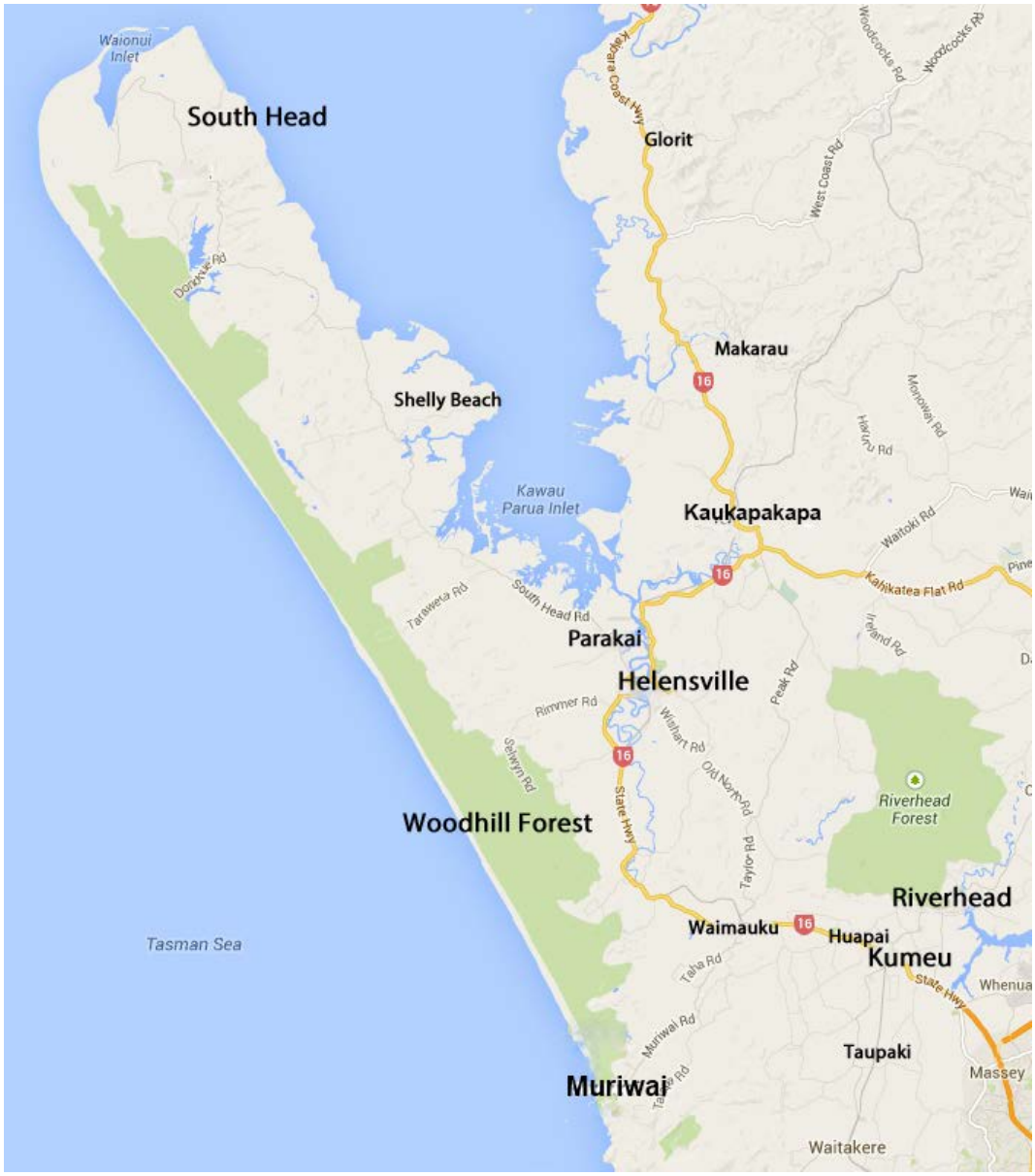
The research reveals the need to have a well-managed, cohesive and sustainable visitor industry that is focused on making the most of existing resources and assets of the area (including heritage and the natural environment) providing a quality experience for visitors and residents alike. Improved infrastructure in terms of roads, public transport, facilities for cyclists, and connectivity (internet) as well as better accommodation options and information for visitors is seen as vital for the future development of the tourism industry in North West Rodney. There is a need to improve information provision for visitors and residents to help them understand what there is to see and do (and spend money on) in NWR and more needs to be done to attract domestic and international visitors to the area.

Contents

Context and objectives

This report presents the findings of the 2014 North West Rodney (NWR) Visitor, Business and Resident Surveys. Specifically, the geographic area covered by this research (see Figure 1) stretches from Taupaki in the south through to Glorit in the north and includes Muriwai, Kumeu, Riverhead, Waimauku, Huapai, Helensville, Parakai, Kaukapakapa, Shelley Beach, Makarau, and South Head.

Figure 1: Map of the North West Rodney research area



The surveys provided an opportunity to engage stakeholders in developing the destination potential of NWR. Visitors, residents and local businesses could highlight what they enjoy about the places they visit in the NWR area, and what they would like to share. Local businesses also comment on the types of new visitor experiences they think could be developed in NWR.

The research includes:

Visitor Survey:

- Visitor characteristics
- Visitor information search behaviour
- Motivations and decision-making
- Where do visitors go and how long do they stay?
- Current recreational activities and visitor satisfaction levels
- Visitor expenditure
- The visitor experience of North West Rodney

Resident Survey:

- Resident characteristics
- Recreational activities and participation rates
- Residents' attitude towards living in NWR
- Willingness to share local experiences
- Heritage and cultural experiences
- Attitude towards the visitor industry

Business Survey:

- Business characteristics
- Staffing, revenue, costs and linkages
- Business/industry networks and local promotion
- Enhancing the visitor experience
- Business confidence

The surveys also provided the opportunity for all stakeholders to indicate their interest in a potential experience sharing tribal heritage and culture with Ngāti Whātua o Kaipara (the South Kaipara hapu of Ngāti Whātua).

In addition to the data generated by the three surveys, the research approach is designed to build awareness of the importance of research and collaboration within the local tourism industry and related sectors. Throughout the research process, public agencies, private enterprise, residents and community groups actively engaged with NZTRI and with each other – providing key players with a stake in the development and use of industry research and an opportunity to engage with tourism processes.

The report first reviews the results of the Visitor survey, followed by the Resident survey, and then the Business survey. We conclude with a brief review of cross-cutting themes where we explore common ground between the three sets of survey findings.

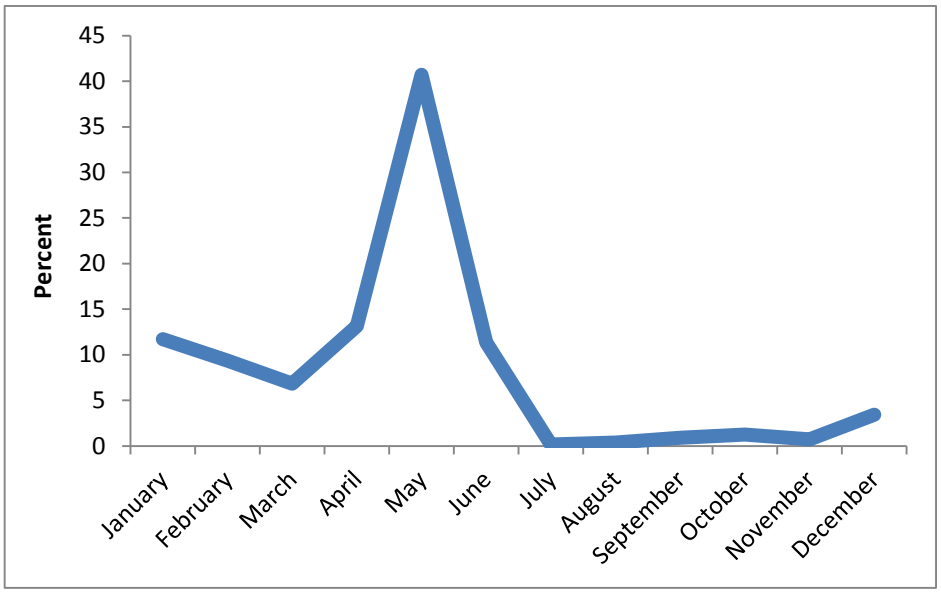
The results of the surveys will underpin the later development of a five-year visitor strategy for the North West Rodney (NWR) area. The focus of the research is on developing approaches that will enhance visitor yield, increase the profitability and sustainability of the tourism industry, and increase collaboration between stakeholders. The surveys also offer the potential to be used again in the future; enabling the possibility of the creation of an ongoing 'barometer' of visitor industry performance in the area.

Method

A web-survey approach was adopted for each of the surveys: Visitor, Resident and Business. The web-based approach is a cost-effective and robust way to gather data and also allows respondents the time to provide detailed responses to open-ended questions.

The Visitor Survey ran from 18 December 2013 to 28 July 2014. The majority of respondents visited the NWR area between the months of April to June (Figure 2). The April to June peak reflects a concerted effort over the period to increase visitor response rates. A total of 587 completed surveys were received.

Figure 2: Month of visit (n=555)



The Resident Survey ran from 5 August 2014 to 17 September 2014. A total of 196 completed surveys were received. The Business Survey ran from 5 August 2014 to 21 September 2014 with a total of 74 completed surveys being received. Based on the database NZTRI developed of local operators in NWR, this represents approximately 20% of the tourism businesses. These convenience samples are considered adequate for research purposes.

The Visitor Strategy Group and the North West District Business Association (NWDBA) worked with their local networks to build awareness of, and participation in the surveys. NZTRI promoted the survey research at various locations within the NWR area targeting both local business, and residents. NZTRI also actively promoted all three surveys through the Institute's networks, existing database, and social media.

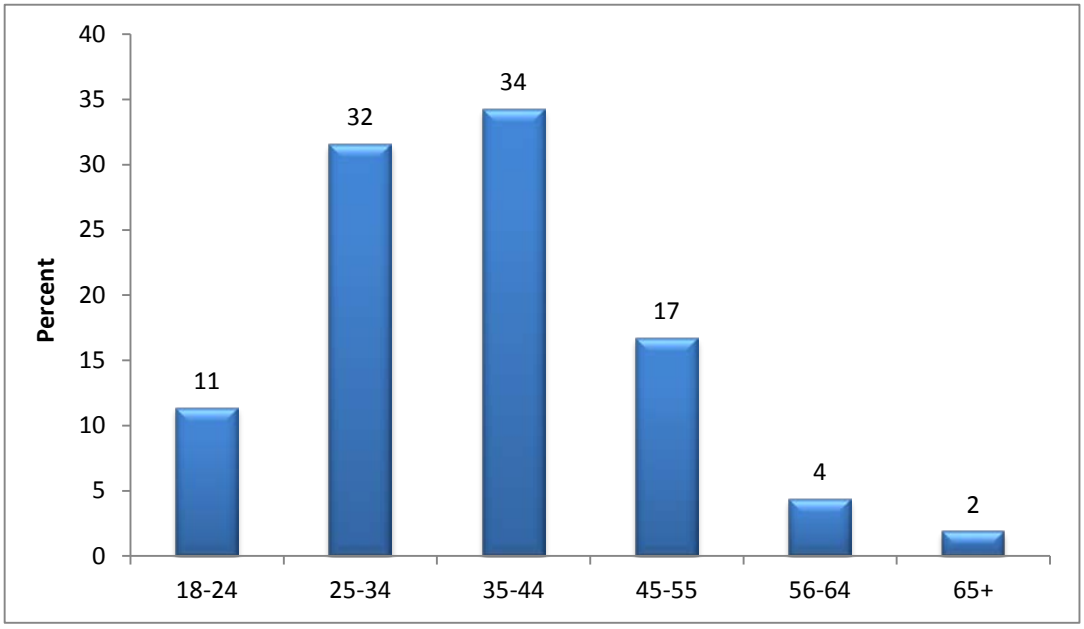
Visitor Survey: Findings

The following section discusses visitor characteristics, including: demographics, information sources used prior to the trip, decision-making factors, travel patterns, length of stay, and participation in local activities, satisfaction levels, and expenditure. This is followed by a review of visitor perceptions of the NWR area, and the likelihood of return visits and referrals.

Visitor characteristics

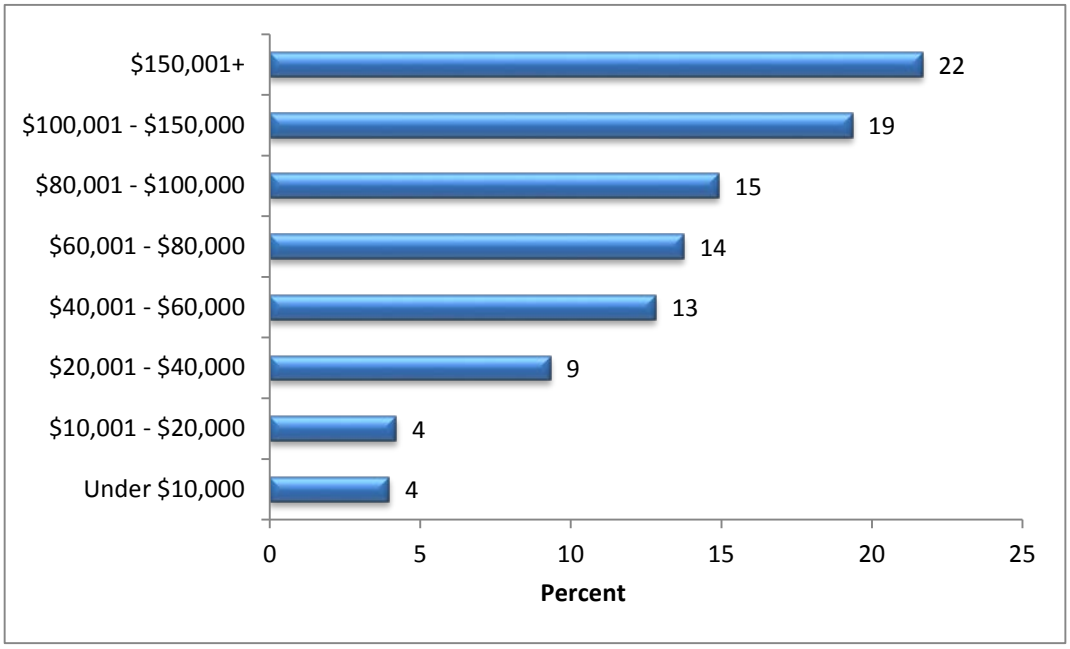
Two thirds of the visitors' surveyed are in the 25-44 age group, with a further 23% aged 45 years or over (Figure 3). Just over 10% are under 25 years of age. Over half (57%) of the visitors (n=485) surveyed are male; 43% are female**.**

Figure 3: Breakdown of visitors by age group (n=485)



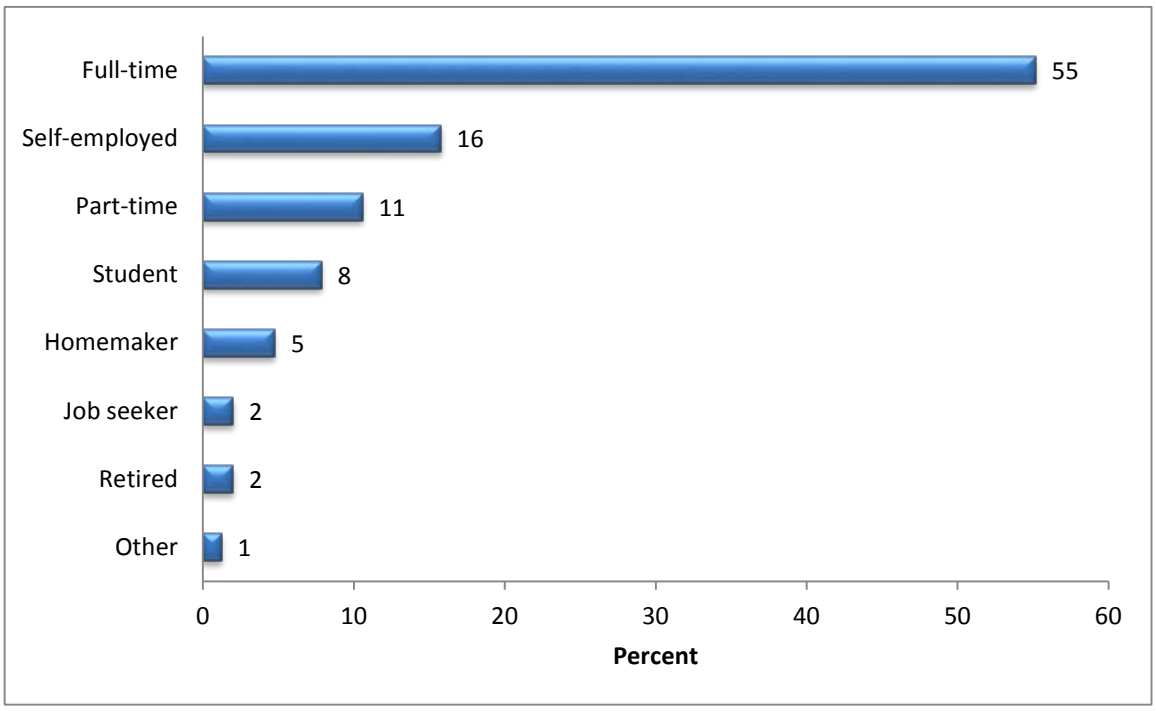
Just over 40% of visitors surveyed have an annual household income of $100,001 or more (Figure 4). A further 42% of visitors have an annual household income of $40,001 to $100,000. New Zealand's average annual income for year ending June 2013 is $85,558 (Statistics New Zealand, 2014).

Figure 4: Total household income (n=429)



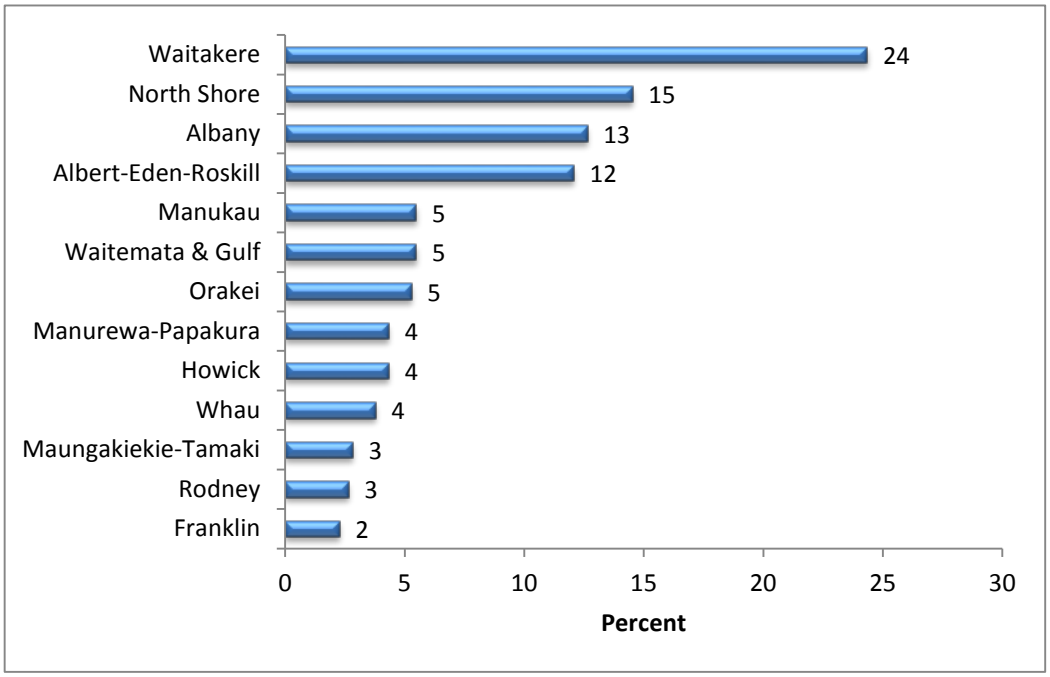
Over half (55%) of visitors surveyed (n=482) are in full-time employment (Figure 5). A further 16% are self-employed and 11% are in part-time employment. Students make up 8% of the visitors surveyed.

Figure 5: Employment status n=482



The vast majority (91%) of visitors surveyed (n=587) are Aucklanders from outside the NWR area; 8% are from elsewhere in New Zealand, and 1% are from overseas. Over half (52%) of those visitors who are from other parts of Auckland live in Waitakere, the North Shore or Albany based on Ward areas (Figure 6).

Figure 6: Breakdown of where Auckland visitors are from by Ward areas (n=530)



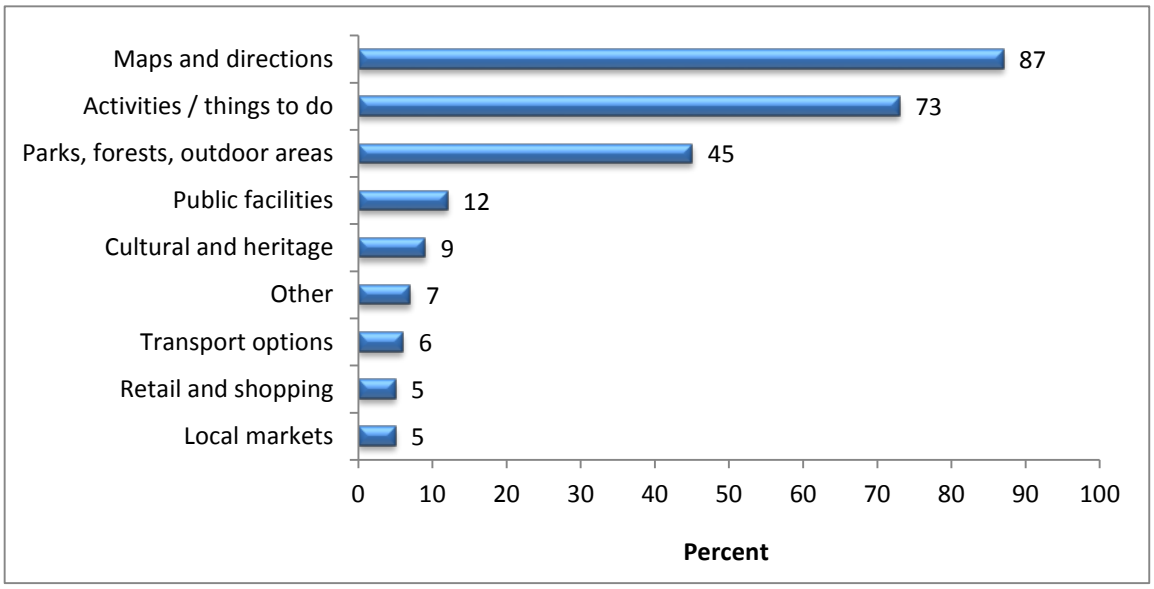
In total, 60% of the visitors surveyed come from the north and central areas of Auckland, with a further quarter (24%) coming from the west.

Of the 8% of visitors surveyed (n=49), who come from another region in New Zealand, 32% live in Northland, 30% in Waikato, 16% in Bay of Plenty and 9% in Wellington. The remaining 14% of the sample is made up of visitors from Otago, Hawkes Bay, Gisborne and Manawatu - Wanganui. Overseas visitors (n=7) come from Australia (n=3), England (n=2), France (n=1) and Hong Kong (n=1).

Information sources

Over 80% of visitors surveyed did not look for information about NWR prior to their most recent trip. Of those visitors who did look for information, 87% searched for maps and directions, and 73% searched for information on activities, and things to do in the area. Nearly half (45%) of these visitors also searched for other information on NWR's outdoor recreational spaces (Figure 7). Other common types of information sought included public facilities (12%), culture and heritage (9%), and transport options available (7%).

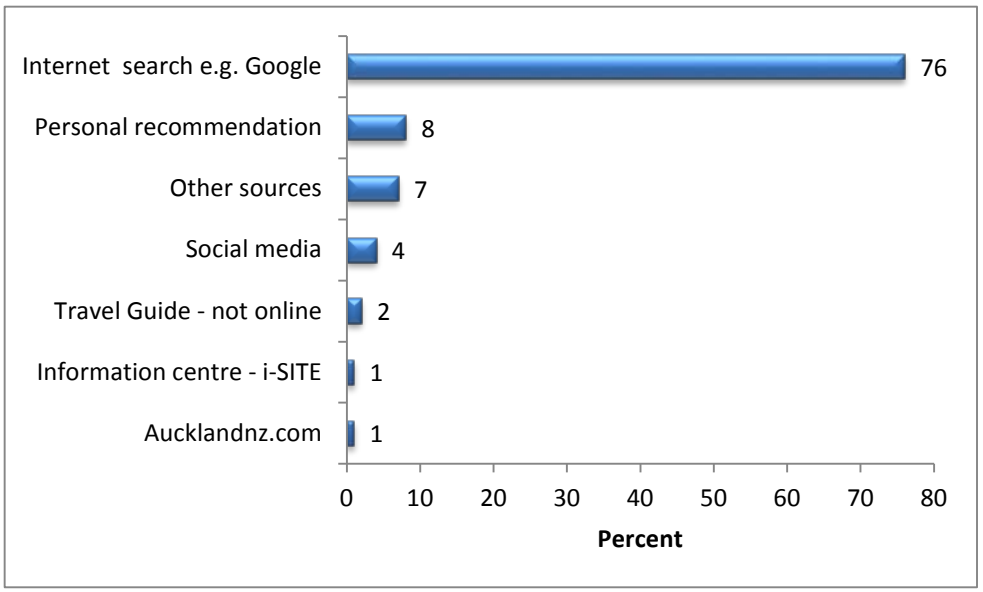
Figure 7: Types of information sought about the NWR prior to visiting the area (n=85)



(Note, respondents could select more than one category so totals do not add to 100%)

The most commonly used source of information is internet search engines (76%), with a smaller number of visitors relying on personal recommendations (8%), and social media (4%) (Figure 8).

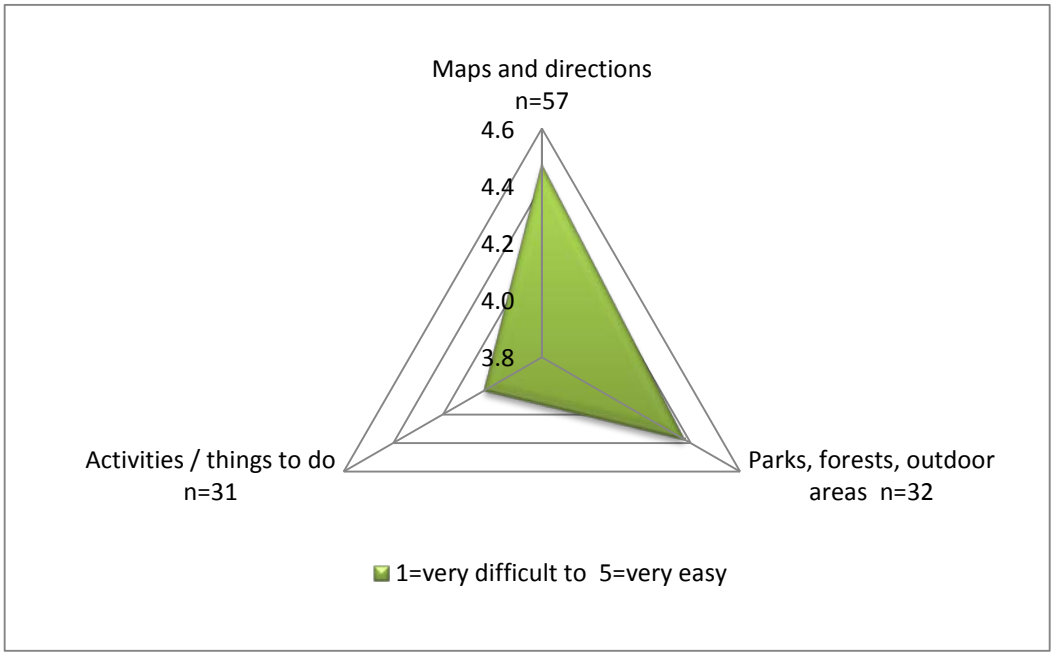
Figure 8: Sources of information (n=72)



(Note, respondents could select more than one category so totals do not add to 100%)

The three 'types of information' most sought after are shown in Figure 9 along with mean values relating to 'how easy was it to find the information'. Visitors had no problem finding maps about the area and directions to NWR (mean 4.5), or about information on the outdoor recreational areas. It is more difficult for visitors to find out about the things they can do in NWR, and the types of activities on offer.

Figure 9: Ease of finding information prior to visiting the area (n=3-57)



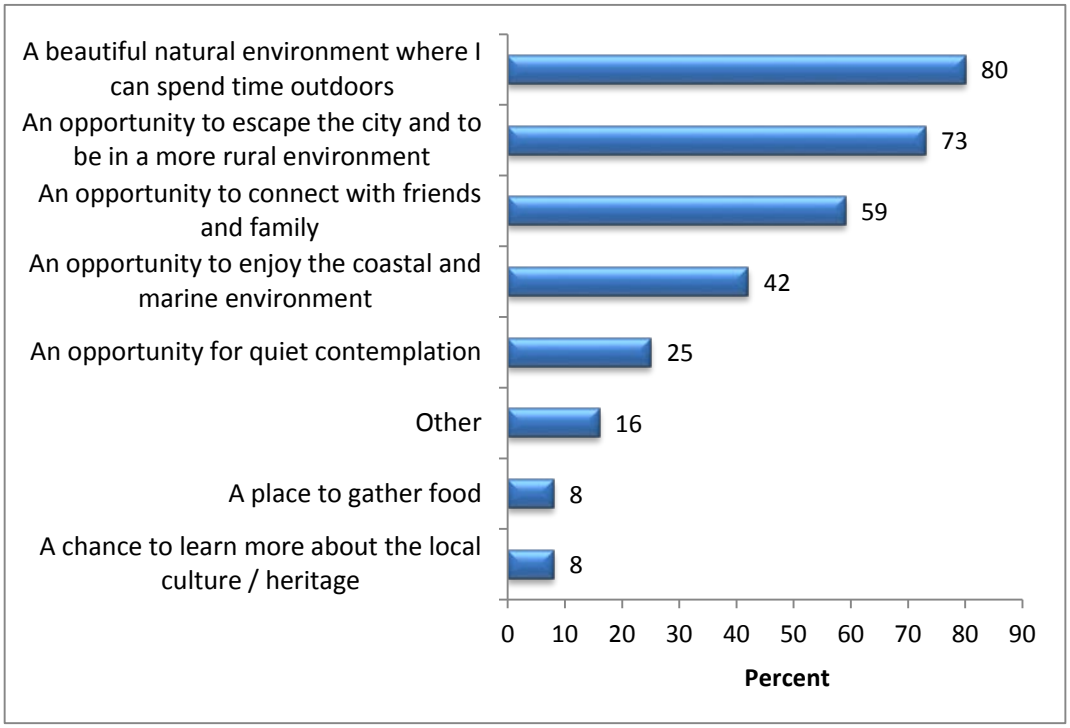
Motivations and decision-making

Visitors were asked for their level of agreement with a series of statements describing what a trip to NWR offers them (Figure 10).

For the vast majority of respondents (80%), a visit to the area offers the promise of a beautiful natural environment where they can spend time outdoors. For nearly three quarters (73%) of respondents it is the opportunity to escape the city, and to be in a more rural environment that really appeals. For others, a trip to NWR was seen primarily as an opportunity to connect with friends and family (59%).

For another group of visitors (16%), the time spent in NWR was more about the recreational activities they could do when coming to the area, such as mountain biking, horse riding or to soak in “a lovely hot pool”.

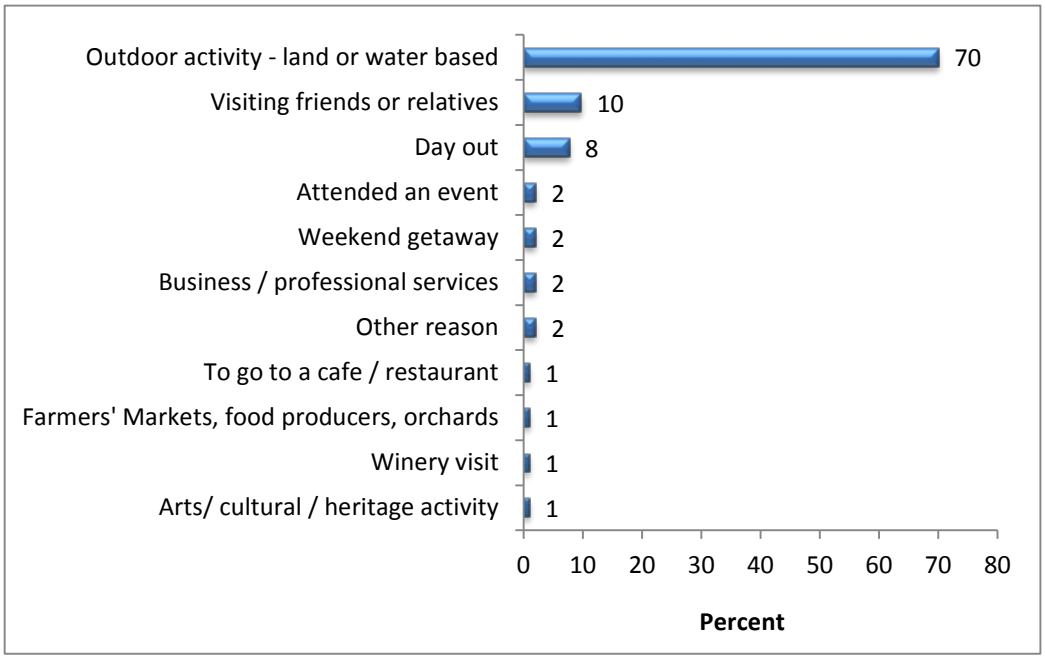
Figure 10: What time spent in NWR offers to visitors (n=491)



(Note, respondents could select more than one category so totals do not add to 100%)

Respondents were asked to provide the 'main purpose of visit' for their last trip to NWR. Over two thirds (70%) of visitors surveyed come to NWR primarily for outdoor activities - either land or water based (Figure 11). Ten percent came mainly to visit family and friends, with a further 8% of visitors simply enjoying a day out in the area.

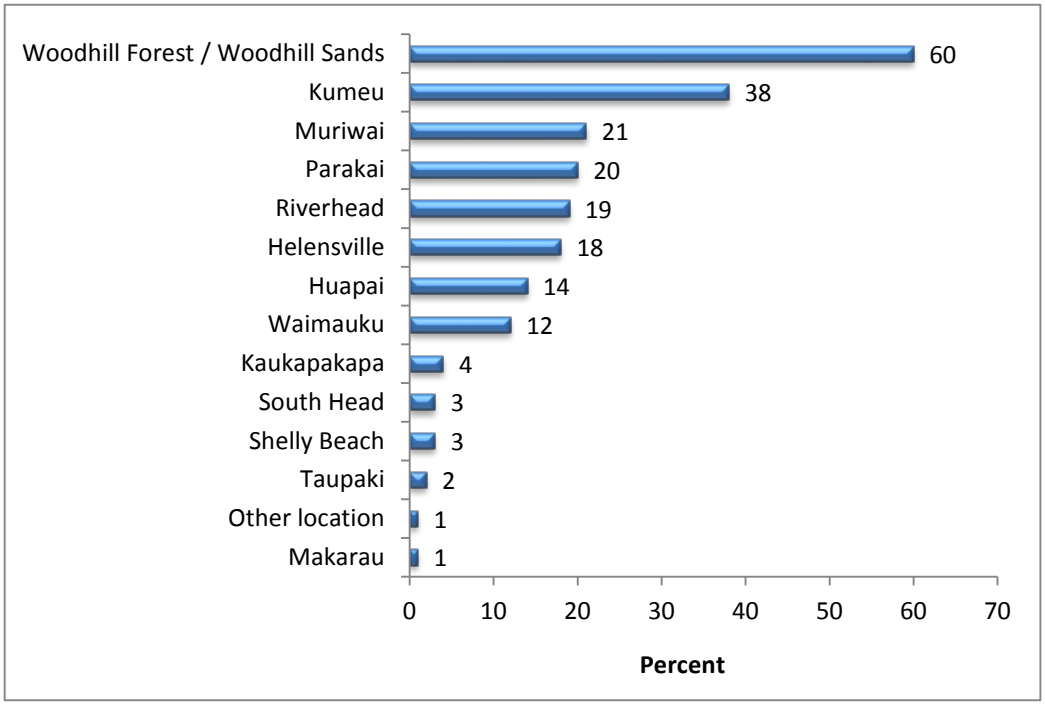
Figure 11: Main purpose of visit (n=586)



Where do visitors go and how long do they stay?

On their most recent visit to NWR, 60% of visitors surveyed stopped or spent time in the Woodhill Forest/ Woodhill Sands area with a further 38% visiting Kumeu (Figure 12). Other popular spots included Muriwai (21%), Parakai (20%), Riverhead (19%) and Helensville (19%).

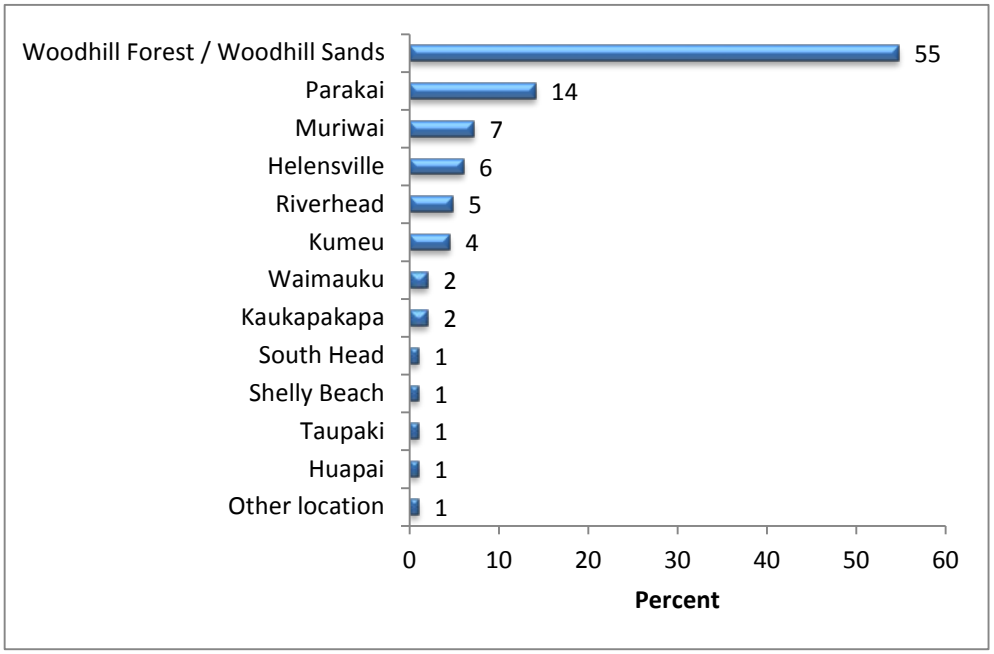
Figure 12: Places where visitors stopped and spent time during their most recent trip to the NWR (n=586)



(Note, respondents could select more than one category so totals do not add to 100%)

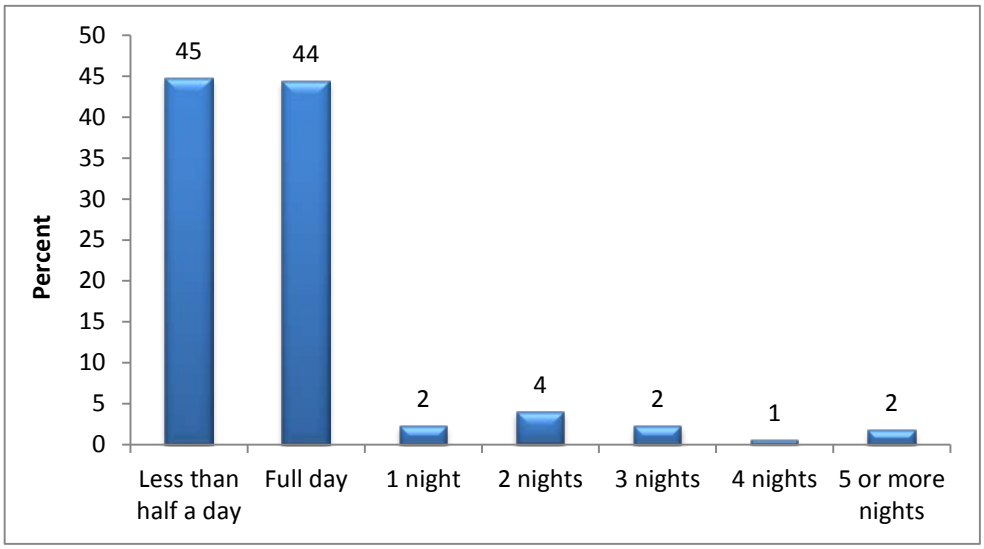
When visitors were asked where they spent the majority of their time when visiting NWR, over half (55%) spent most of their time in Woodhill Forest / Woodhill Sands, and Parakai (14%) (Figure 13). Kumeu drops from 38% of visitors who stopped off there to only 4% who spent any significant amount of time there. Visitors spend less time in Muriwai (7%), Helensville (6%) and Riverhead (5%).

Figure 13: Primary destination of visitors (n=582)



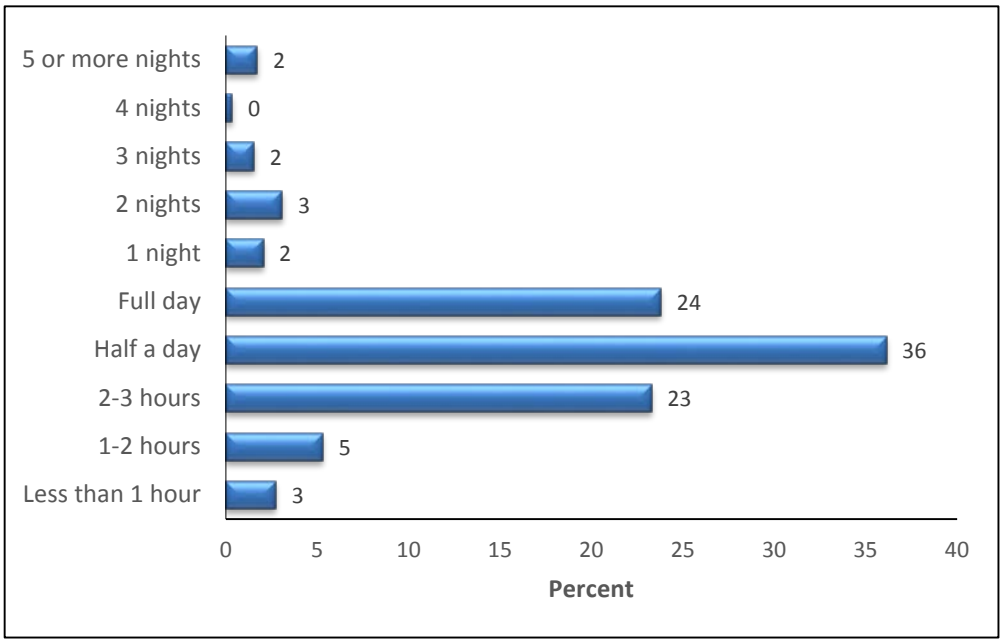
Nearly 90% of the visitors surveyed (n= 576) come to the NWR area as part of a day trip. A total of 45% spend less than half a day in the area, with a further 44% spending the full day (Figure 14). Just over 1 in 10 of those surveyed (11%) choose to stay overnight. Of the overnight visitors (n=59), most stayed 1 night (2%) or 2 nights (4%). The average length of stay for overnight visitors is 2.8 nights.

Figure 14: Length of stay in the region (n=576)



Nearly 60% of visitors spend between 2 hours to half a day in NWR at their primary destination (Figure 15). A further quarter (24%) of visitors spend the entire day. Visitors are less likely to come to spend 2 hours or less (8%) in their primary destination.

Figure 15: Length of stay in primary destination (n=584)

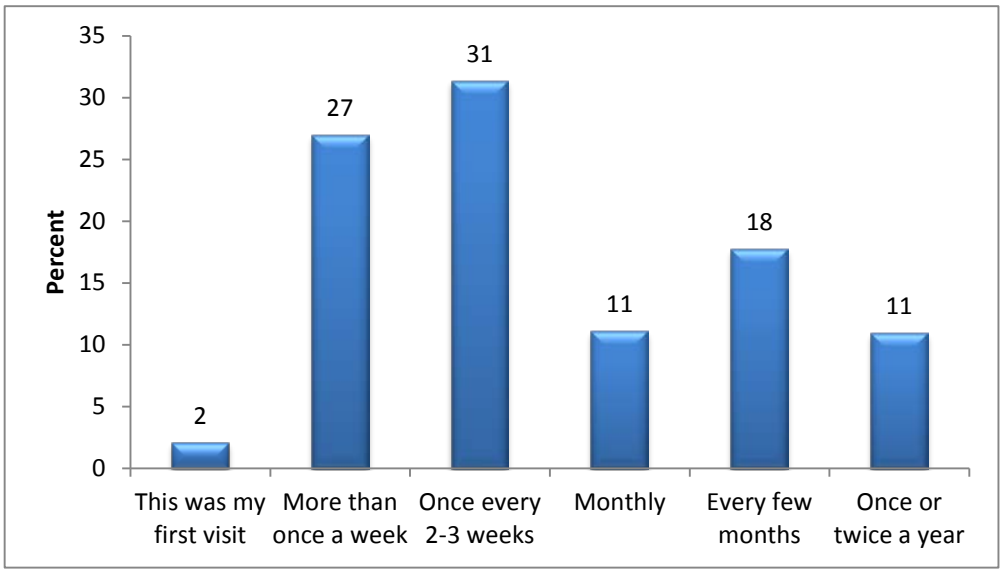


The vast majority of visitors (n=581) travelled with other people on their outing to NWR, with many coming with friends (41%), their partner/spouse (31%), other family members (26%), or with children (20%). Just 17% travelled on their own to the area.

Nearly all (93%) of the visitors (n=581) came by private car. Other transportation options (3%) included campervans, horse trucks, cycles and motorbikes.

Only 2% of visitors surveyed had not been to the NWR area before. Of the return visitors (98%), over two thirds (69%) come to the area on a fairly regular basis – at least once a month (Figure 16). Just under 20% visit the area every few months, with a further 11% coming once or twice a year.

Figure 16: Frequency of visit to the NWR per year (n=587)

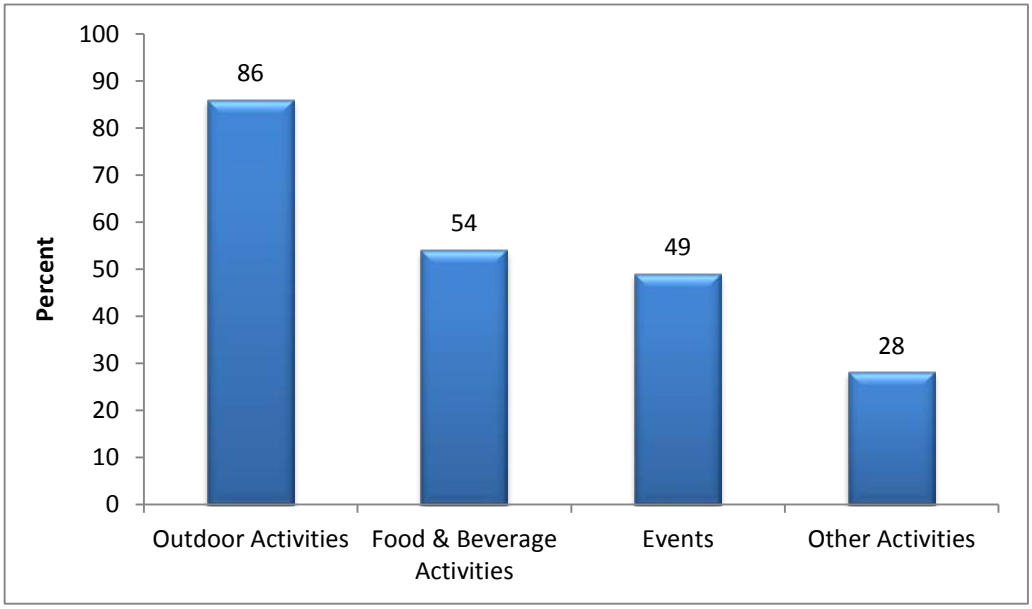


Recreational activities

To help gauge the recreational interests of visitors to NWR, respondents were asked what types of activities they participated in during their most recent visit, based on four broad categories (Figure 17).

By far the most popular is outdoor activities (86%) followed by food and beverage activities (54%), and taking part in events (49%). Other activities (28%) include: visiting heritage attractions, museums and galleries, shopping, visiting parks and gardens, and birdwatching.

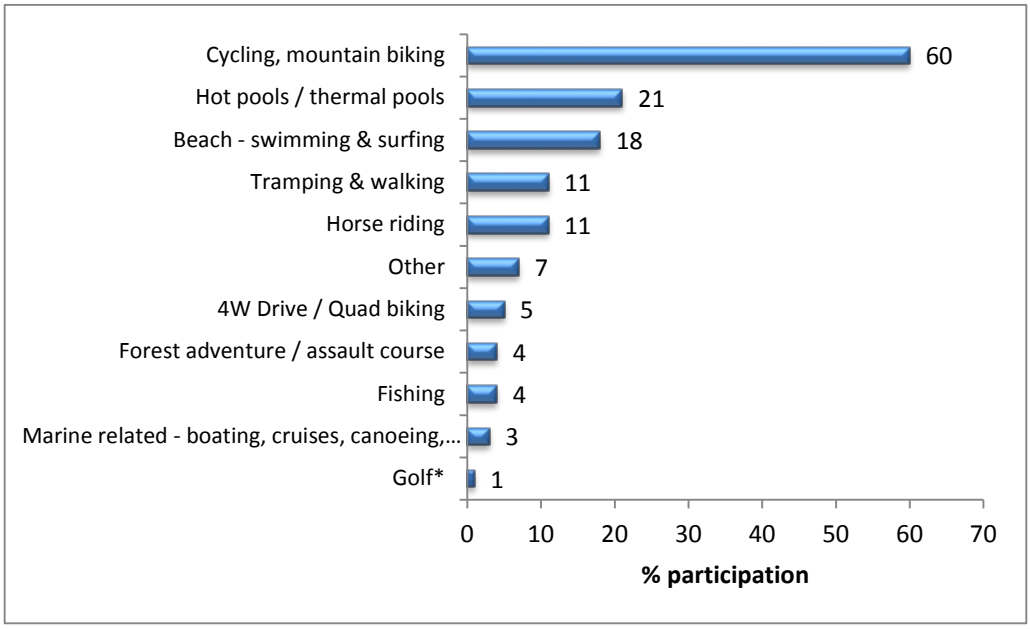
Figure 17: Types of recreational activities visitors participated in (n=86; n=314; n=287; n=165)



(Note, respondents could select more than one category so totals do not add to 100%)

For those visitors who participate in outdoor activities, cycling (mostly mountain biking) was the most common activity (60%) followed by hot pools/thermal pools (21%), and beach related activities (18%). Just over another 20% go either tramping and walking or horse riding in the area (Figure 18). Other activities (7%) included hunting, running, dirt bike riding, kiting, paragliding, orienteering, motocross, and paintball.

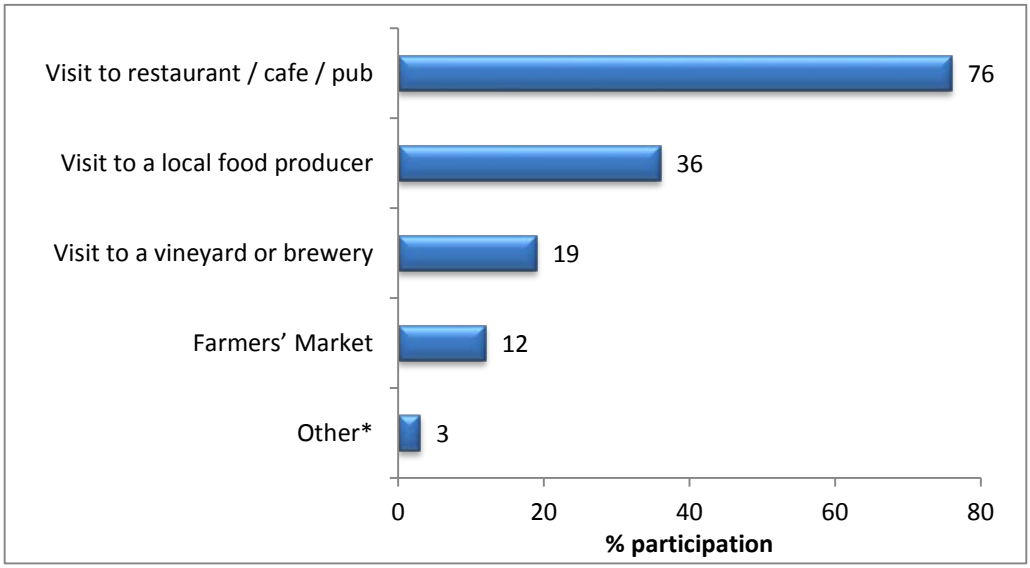
Figure 18: Types of Outdoor related activities visitors participated in (n=7-304)



*(Note, respondents could select more than one category so totals do not add to 100%.*denotes <20 responses)*

Just over three quarters (76%) of visitors who participated in food and beverage activities patronised local restaurants / cafes and pubs (Figure 19). Over a third of this group (36%) came to the area to visit a local food producer, with a further 19% coming to spend time at a local brewery or vineyard.

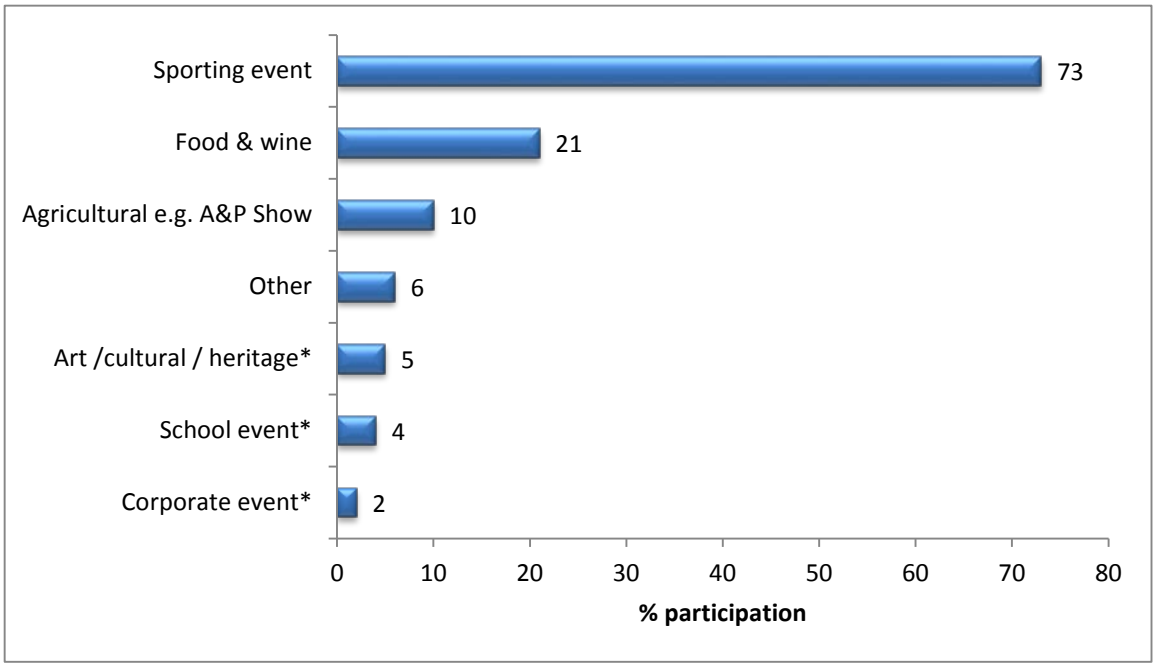
Figure 19: Types of Food and Beverage related activities visitors participated in (n=9-239)



*(Note, respondents could select more than one category so totals do not add to 100%.*denotes <20 responses)*

Over two thirds (69%) of visitors coming to NWR for an event, attended one with a sporting focus (Figure 20). Just under a third attended either a food and wine event (21%) or the local A&P Shows (10%). Other events (6%) included a variety of family orientated activities.

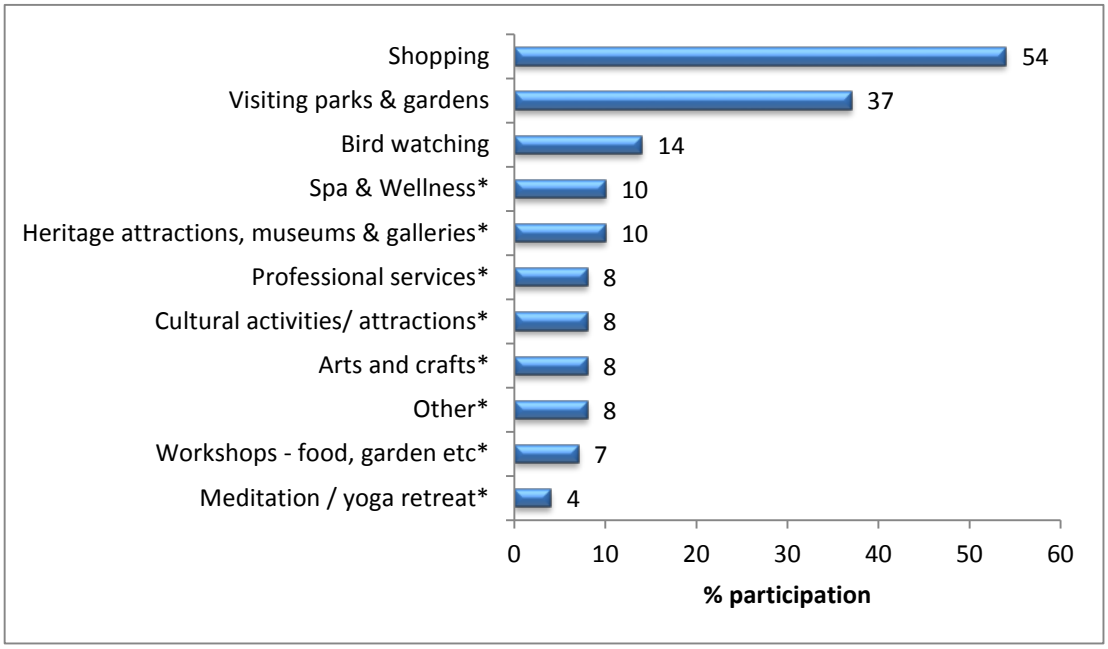
Figure 20: Types of Event related activities visitors participated in (n=6-199)



*(Note, respondents could select more than one category so totals do not add to 100%.*denotes <20 responses)*

Other activities that visitors participate in while in the area are shopping (54%), and visiting parks and gardens (37%). Some visitors also participate in bird watching (15%). The remaining activities visitors participated in during their time in NWR include spa & wellness (10%) , heritage attractions etc. (10%) all have less than 20 responses so need to be looked at in that context (Figure 21).

Figure 21: Other Recreational related activities visitors participated in (n=6-89)

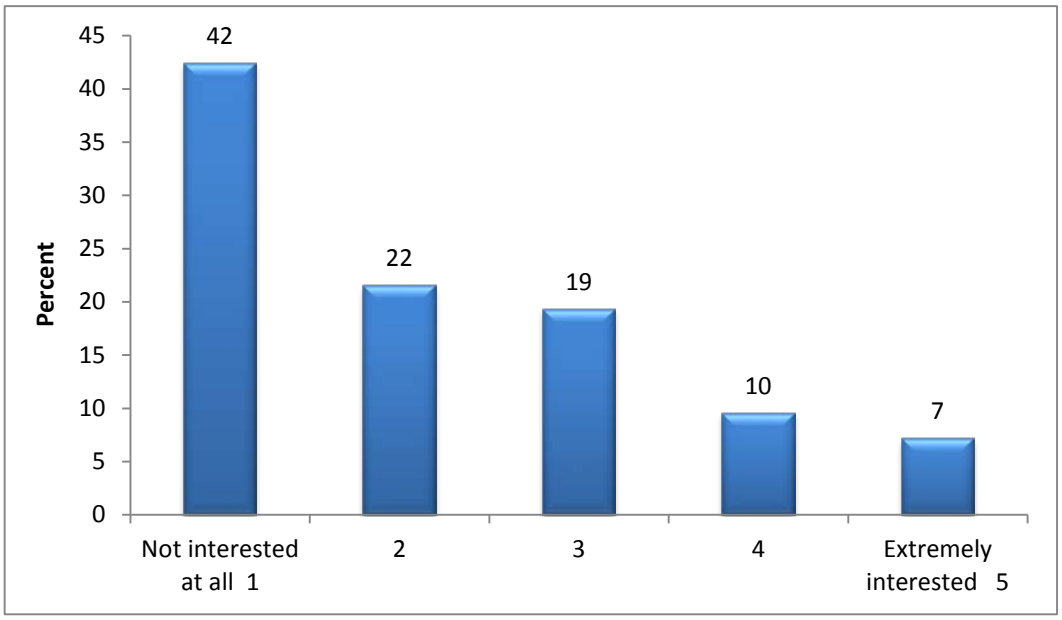


*(Note, respondents could select more than one category so totals do not add to 100%.*denotes <20 responses)*

Culture and heritage activities

Ngāti Whātua o Kaipara want to know if visitors to NWR would be interested in experiences that offered the opportunity to share in and learn about their tribal heritage and culture. Of the 502 visitors who responded, 17% indicated they are interested, or 'extremely' interested in such an experience (Figure 22). Twenty two per cent showed less interest with just over 40% indicating they had no interest at all.

Figure 22: Visitors interest in visiting the region for an experience with Ngāti Whātua o Kaipara, sharing tribal culture and heritage (n=502) Mean=2.2

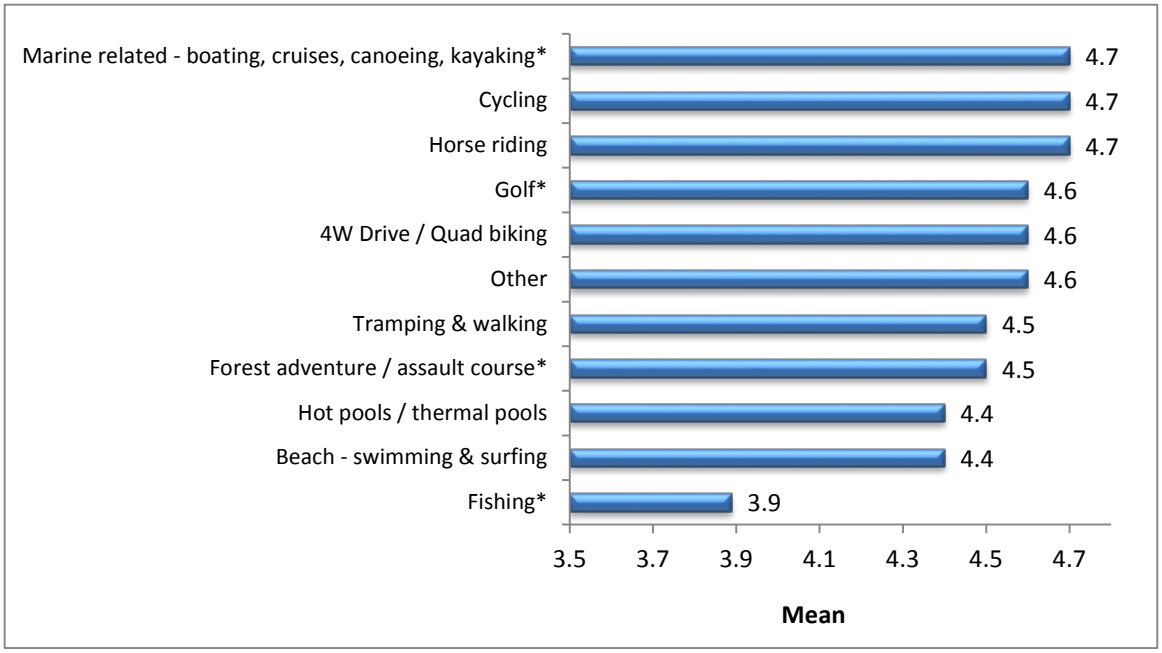


Visitor satisfaction levels with current recreational activities

Visitors were asked to rate their level of satisfaction with the activities they participated in (using a scale of 1 - very dissatisfied, to 5 - very satisfied).

Outdoor activities - Visitors are very satisfied (4.7) with their outdoor experience with marine related activities, cycling, and horse riding in the area (Figure 23). They are also satisfied (4.6%) with their experience of going 4 Wheel driving and quad biking.

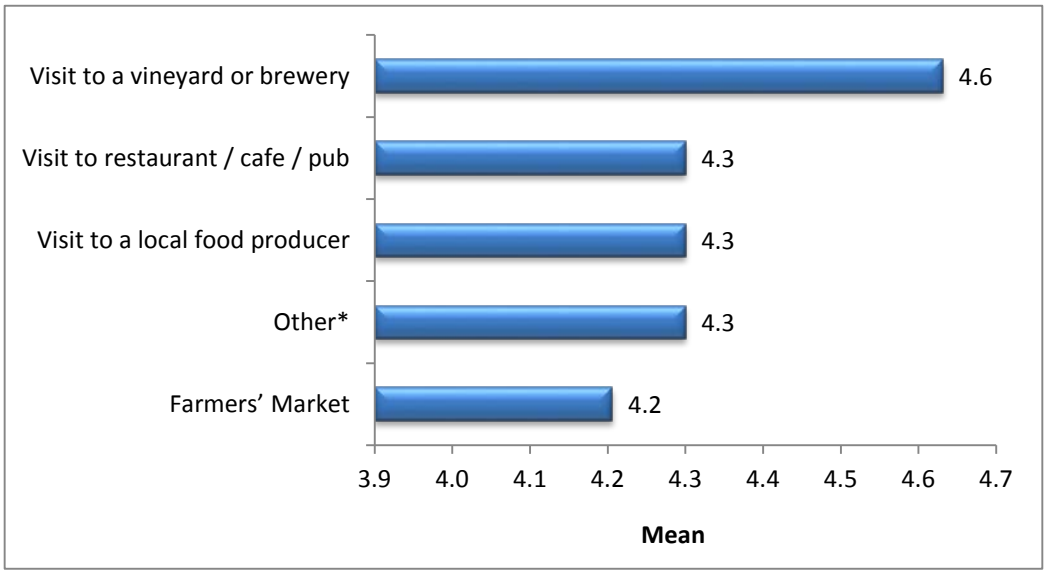
Figure 23: Visitor satisfaction levels with the Outdoor Activities they participated in (n=5-296)



*(*denotes <20 responses)*

Food and Beverage activities - Visitors are very satisfied (4.6) with their experience at a local vineyard or brewery (Figure 24). They are also satisfied with their experience of going to one of the local eateries or pubs (4.3), and time spent visiting local food producers (4.3). Visitors are slightly less satisfied with the local Farmers markets (4.2) but this still rates well out of a top scale of 5.

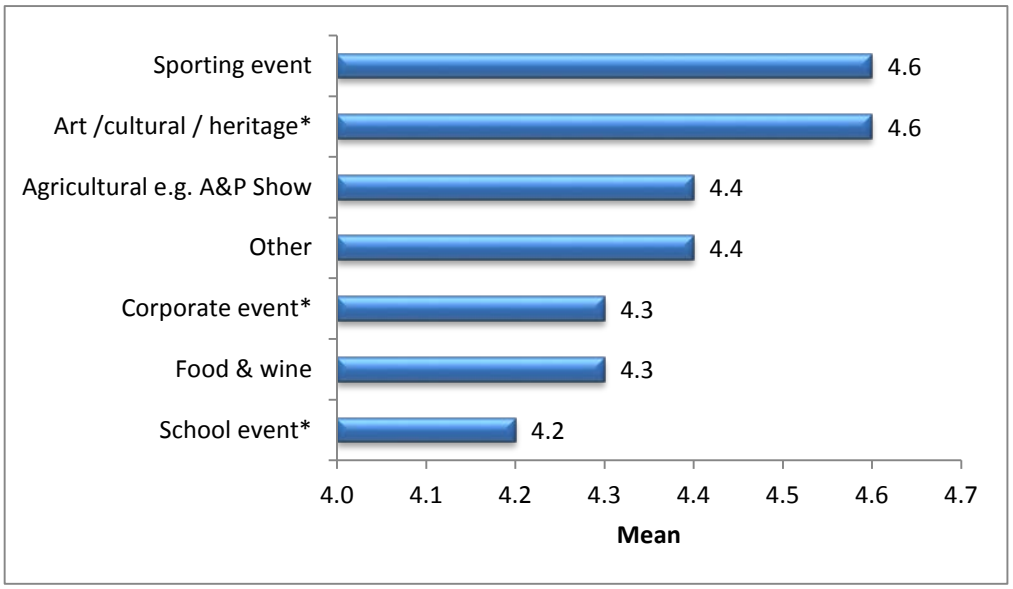
Figure 24: Visitor satisfaction levels with the Food and Beverage related activities they participated in (n=7-210)



*(*denotes <20 responses)*

Event activities - Visitor satisfaction for those who attended a sporting events is relatively high (4.6), along with the limited number of visitors (n<20) who attended an art/cultural/ heritage event in the area (Figure 25). Visitors are also satisfied with their experience of going to a local A&P show (4.4). School events rated the lowest at a mean of 4.2 out of five and again having less than 20 responses, this rating may not be indicative.

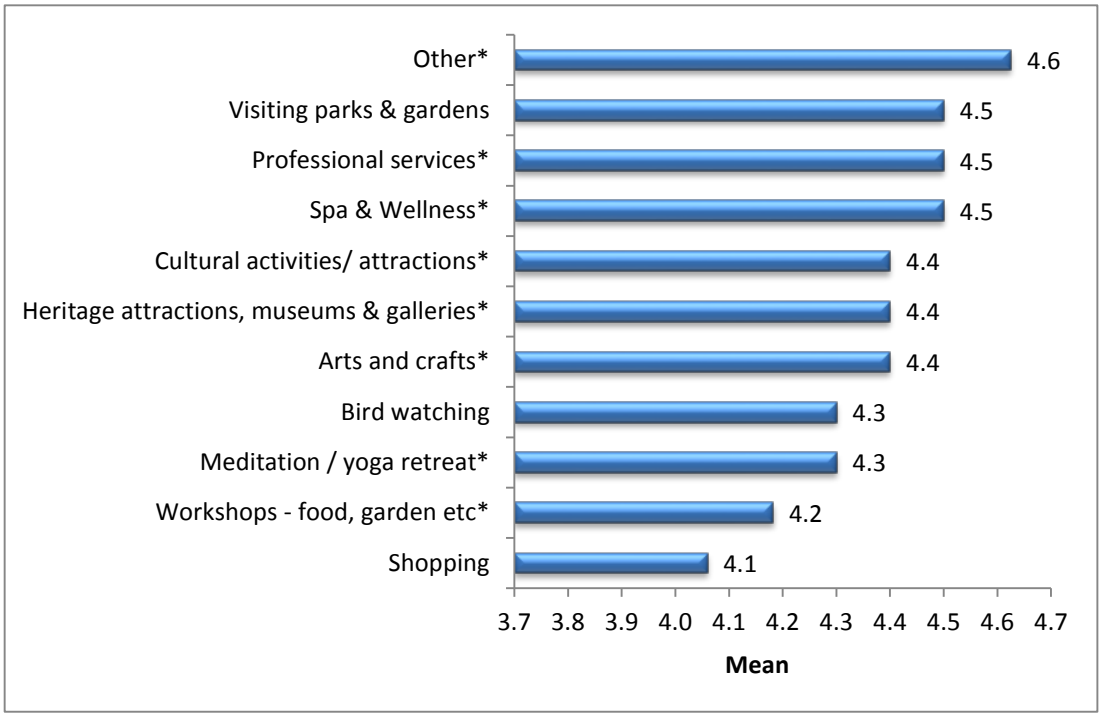
Figure 25: Visitor satisfaction levels with the Events related activities they participated in (n=3-184)



*(*denotes <20 responses)*

Other activities - Visiting parks and gardens (4.6 out of five) rated highly (Figure 26). Shopping - which was the most common 'other' activity - ranked slightly lower when it comes to satisfaction levels, with the lowest mean of 4.1 out of five. Bird watching, the third most common activity, rated at 4.3 out of five.

Figure 26: Visitor satisfaction levels with the 'Other' recreational activities they participated in (n=4-84)



*(*denotes <20 responses)*

Visitor expenditure

We asked visitors if they spent any money during their visit to NWR, of the 455 responses to the question, 91% indicated they had made some type of purchase of goods and/or services. The average spend per person if all visitors are included (including those who spend nothing) is $24 per person per day.

Day visitor's average is dominated by purchases on food and beverage ($8), followed by $6 on outdoor activities (Table 1). Spend on visitor attractions and events are the lowest at $1 per person per day.

Table 1: Total Day Visitor Spend (including those that did not spend) n=514*

	%	Per Person Per Day
Food / beverage	35	8
Outdoor activities	25	6
Transport	11	3
Other	11	3
Shopping	10	2
Events	4	1
Visitor attractions	4	1
Total	**100**	**$24**

** Day visitor spend is based on a total of 514 day visitors (including 1389 people in their cost estimate: 1028 adults and 361 children).*

Overnight visitors' average spend is likewise dominated by purchases on food and beverage ($7). Overnight visitors spend on shopping is higher than day visitors at $6 per person per day (Table 2). Accommodation costs are 15% of the overnight visitor's total spend in NWR at $4 per person per day. Spend on outdoor activities is amongst the lowest at $1 per person per day.

Table 2: Total Overnight Visitor Spend (including those that did not spend) n=62*

	%	Per Person	Per Person Per Day
Food / beverage	30	21	7
Shopping	23	16	6
Accommodation	15	10	4
Events	8	5	2
Transport	8	5	2
Visitor attractions	7	5	2
Outdoor activities	6	4	1
Other expenses	3	2	1
Total	**100**	**$68**	**$24**

**Overnight visitor spend is based on total of 62 overnight visitors (including 202 people in their cost estimate: 118 adults and 84 children) and an average stay 2.8 nights.*

Of the overnight visitors (n=50), nearly half (46%) stayed with friends/family or in their own vehicles (18%), which is reflected in the relatively low spend in the accommodation category. The average overnight visitor spends $68 during their entire trip (average stay 2.8 nights) on a daily basis their spend is $24 which is virtually identical to day visitors.

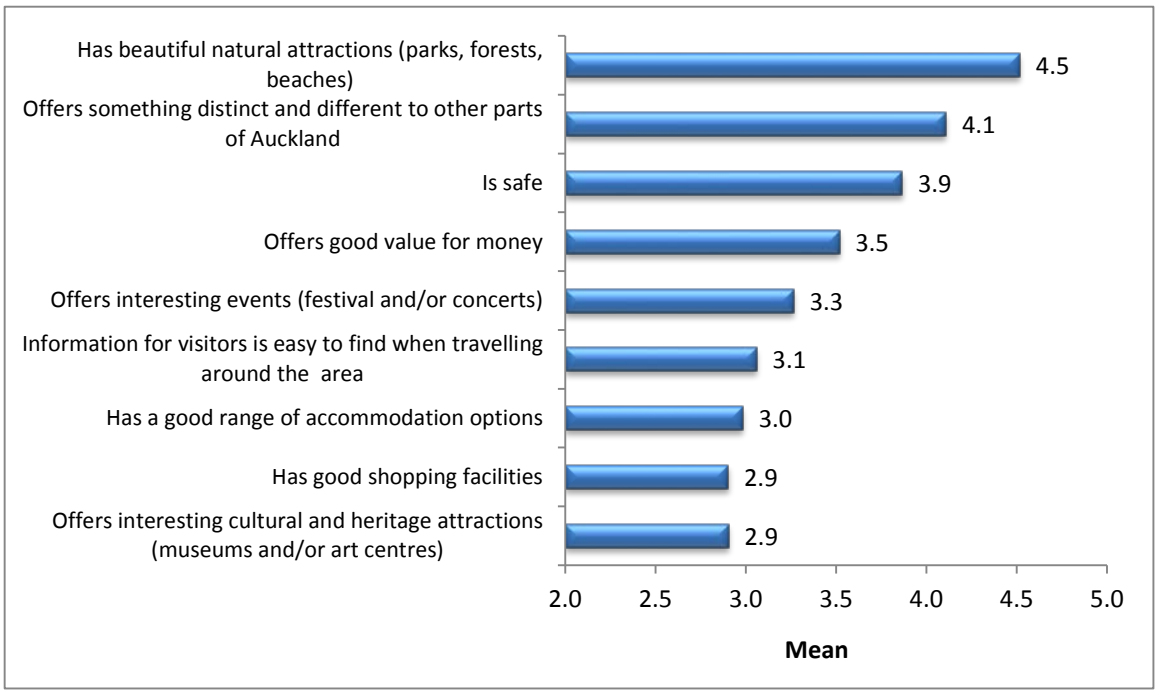
For every 10,000 visitor days in the region $240,000 is generated for the local economy.

The visitor experience of the North West Rodney

Visitors surveyed were asked to indicate their agreement with a series of nine statements about NWR as a visitor destination on a scale of 1 (strongly disagree) to 5 (strongly agree). The NWR area's beautiful natural attractions rated the highest at 4.5 out of 5 (Figure 27).

Visitors clearly agree with the statement that NWR as a destination offers something distinct and different compared to other parts of Auckland (4.1). The area is seen as relatively safe (3.9) and offering relatively good value for money (3.5). The four statements that received the lowest rating were 'access to visitor information is easy' (3.1), 'there is a good range of accommodation on offer' (3.0), 'good shopping facilities' (2.9) in NWR, and that the area offered 'interesting cultural and heritage attractions' (2.9).

Figure 27: Visitors level of agreement on statements about NWR as a visitor destination (n=282-462)



Visitors (n=410) were asked for the three most attractive or appealing aspects about NWR as a destination (Table 3). The following themes emerged from the comments:

Of the total visitor comments (n=769), nearly a third (30%) relate to the stunning **natural environment**. Visitors are impressed with the scenic beaches, forests and rural countryside with its 'rustic appeal'.

A quarter (24%) of the comments focussed on the **good range of activities** on offer in NWR. The area is well known for its adventure based activities with visitors enjoying mountain biking and 4Wheel driving in Woodhill Forest. Other activities to get a special mention include equestrian/ horse riding, surfing and the hot pools - *'great mix of activities available to visitors and locals'*.

Table 3: Most attractive or appealing about NWR for visitors n= 410

Themes	% of comments
Natural environment	30
Activities on offer	24
Peaceful rural lifestyle	22
Local culinary / hospitality experiences	10
Accessible/proximity	9
Friendly people	5

The **peaceful rural lifestyle** of NWR is appealing to visitors, with over 20% of the comments highlighting how 'quiet and relaxing' the area is. Visitors also enjoy the spaciousness of the landscape with all the 'open spaces' and the 'clean fresh air', with one commenting that they 'loved the smell of nature.'

Visitors also appreciate the **culinary / hospitality experiences** (10% of comments) and the local fresh produce on offer. The many wineries, local brewery and cafes in the area are also regarded as being the most appealing aspect about a visit to NWR.

Other favourable aspect mentioned about NWR is its close **proximity to the urban areas of Auckland**, (9%) and how easy it is to access. The ease of access to local beaches, forests and other outdoor recreational areas is also seen as an attractor. Ease of access to the forest for equestrian activities makes NWR very attractive for those visitors wishing to ride in the area.

Visitors also commented on how **'friendly' the local people** (5%) are which again highlights the peaceful rural lifestyle people tend to associate with NWR.

Visitors were asked for the three least attractive or appealing aspects about NWR as a destination (Table 4). Of the 270 comments made by visitors, three quarters dealt with concerns about roading, other local infrastructure and facilities, and environmental issues.

Roads emerges as a major issue for visitors to the area with nearly half of the comments made concerning their condition. Several comments were about the 'ongoing road works', 'traffic congestion', 'speed cameras', 'road conditions', and 'windy/dangerous roads' that some visitors regard as unsafe. Comments were also made about there being no passing lanes, and contending with the many horse floats on the road.

To a lesser degree a **lack of local infrastructure** (18%) was highlighted by respondents – particularly the lack of public toilets, public transport, amenities, quality cafes, shop opening hours, and signage with local information.

Table 4: Least attractive or appealing about NWR for visitors n= 296

Themes	% of comments
Roading/ lack of infrastructure	63
Environmental issues	12
Nothing	9
Accessible/proximity	7
Urbanisation and new developments	5
Unattractive and featureless townships	4

Some Visitors made comments about environmental concerns, in particular logging in the Woodhill Forest Bike Park area (12%). These visitors are mainly concerned that mountain bike trails in the forest are being damaged by the logging activity in the area. There were also a few comments about rubbish, and the local weather being less than favourable during their visit.

Some visitors (7%) feel that the area is not accessible enough and a few comments (5%) concerned the increase in developments in the area, especially the 'light industrial sprawl of Kumeu' and the growth housing near Muriwai. A small number of comments (4%) made by visitors were about how shabby or visually unattractive some of the townships have become, especially Kumeu, Parakai, and Helensville.

Return visits and referrals

The vast majority of visitors (n=486) plan to visit NWR again. When asked if they would recommend NWR as a place to visit nearly all (98%) of visitors (n=475) said they would; 2% said they would not.

Respondents (n=445) went on to explain why they would recommend NWR as a destination to others (461 comments). The types of activities and attractions on offer (62% of comments), and the beautiful natural environment (24%), were the two main reasons given.

Visitors are happy to recommend a visit to NWR as they see it as a place which is 'diverse and offers something different to the rest of Auckland'. Visitors want to share their enjoyment of recreational areas like Woodhill Forest/ Woodhill Sands and local beaches, for activities such as mountain biking, horse-riding and off road four wheel driving.

Visitors also recommend the local Parakai hot pools for a fun family day out or as a place to relax. Other attractions highlighted include the Muriwai Gannet Colony, Sculpture trail, the Riverhead Tavern, Hallertau Brewery, and local wineries.

> *There are so many hidden treasures to be found in the natural environment*
>
> *Very pretty great wine region could be like Hawkes Bay if developed properly*

Visitors wanted others to experience the natural environment, with its rural vistas, forests, and 'beautiful coastal environment'. Comments about the natural environment included descriptions like 'stunning and peaceful, 'rugged outdoors', 'naturally beautiful', and 'close to city but wild'. Places like Muriwai are described as a 'largely untouched wilderness' with its 'beautiful scenery and wildlife'.

Other reasons for recommending NWR include being a 'good day trip' with easily access to the area, and its close proximity to the rest of Auckland (7%) - 'close enough to afford, far enough to feel like a holiday'. The rural lifestyle and friendly people (7%) is another selling point for the area, described as having 'a unique country rural vibe to it'.

> *Makes a great day/weekend away from busy city life with friends and families, has a lot to offer*
>
> *Great place to escape the hustle and bustle and clear your head…*

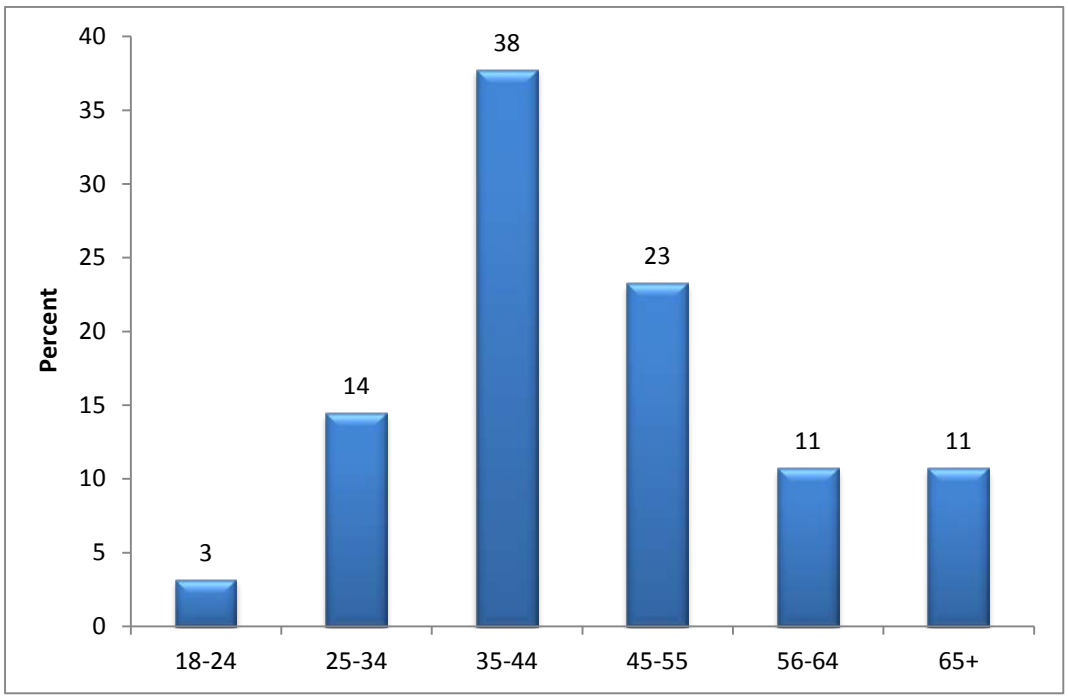
Resident Survey: Findings

The following section discusses the profile of residents who responded to the survey including demographics, and the types of recreational activities they participate in. We then review resident attitudes towards living in NWR, and the types of local experiences they would like to share with visitors. The final section explores resident attitudes towards the visitor industry.

Resident characteristics

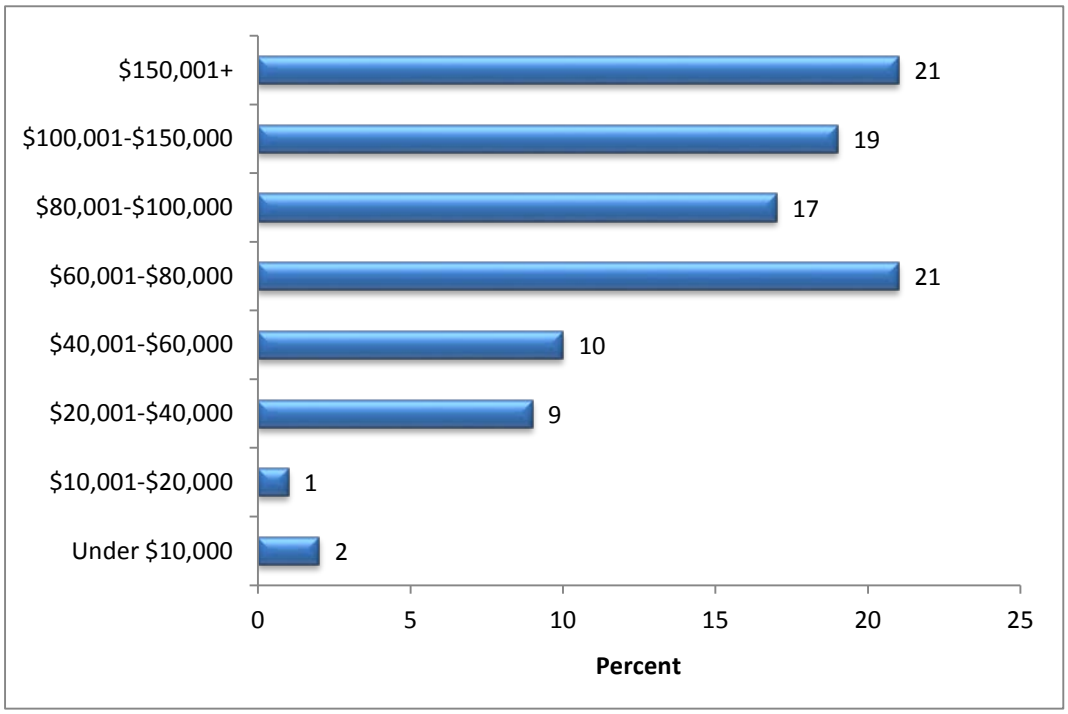
Over half (55%) of the residents surveyed are under 45 years of age with nearly 40% of this group being aged 35 to 44 years old (Figure 28). Around 19% of the total sample (n=196) did not indicate their age. A high proportion (81%) of the residents surveyed are female, 19% are male. Based on previous research, women tend to be more likely to complete surveys, however the proportion of women is higher than would normally be expected.

Figure 28: Breakdown of Residents by age group (n=159)



Over half (57%) of the residents surveyed have an annual household income over $80,000, with 21% earning over $150,000 (Figure 29). Around 20% of the residents have an annual household income of $60,000 to $80,000.

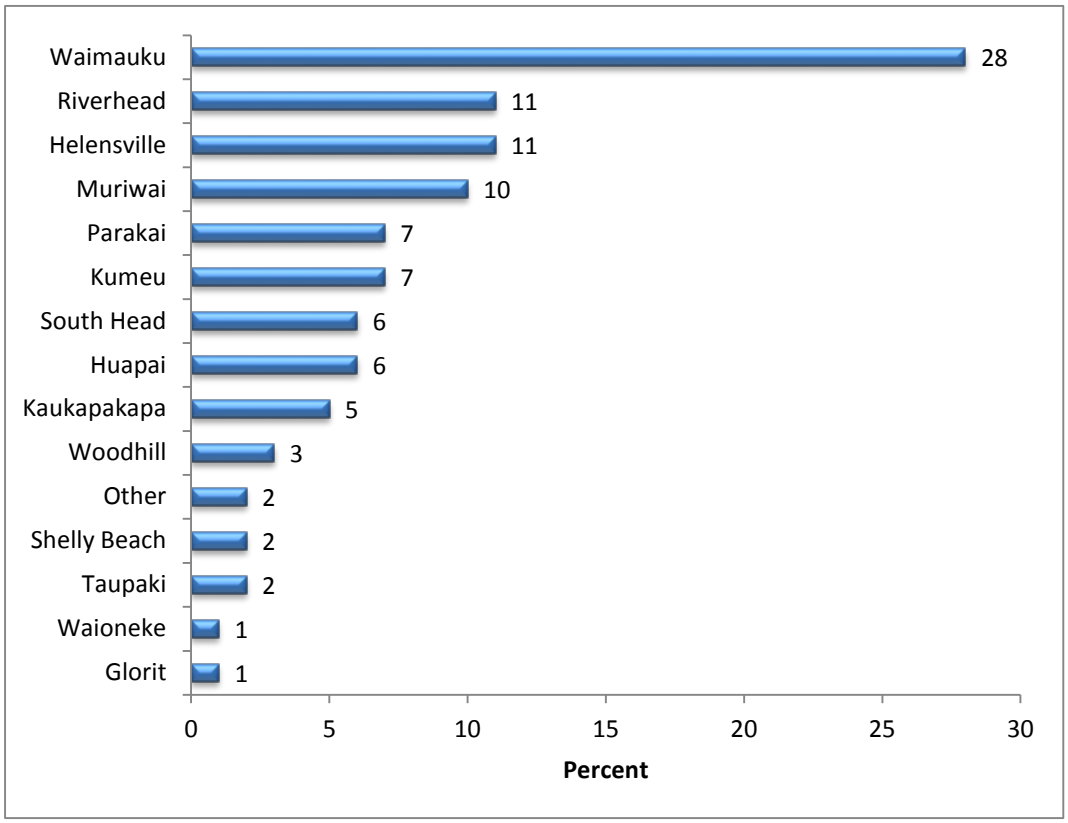
Figure 29: Resident's annual household income (n=121)



Over a third (37%) of residents surveyed (n=157) are in full-time employment; a further quarter are self-employed, and 18% are in part-time employment. The employment status of other residents include retiree (8%), homemaker (6%), student (3) and job seeker (2%).

Nearly 30% of residents surveyed live in Waimauku, with a further third (32%) residing in Riverhead, Helensville or Muriwai (Figure 30). There was a reasonable representation from all townships within NWR, with a good geographic spread from Taupaki in the south, to Glorit in the north.

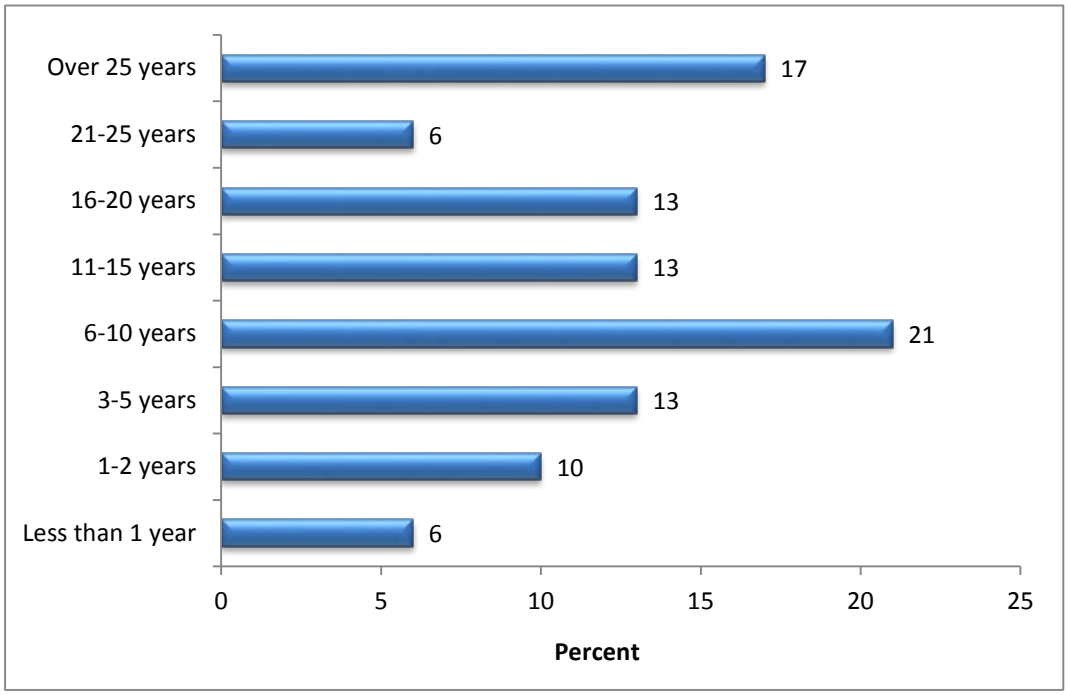
Figure 30: Where NWR residents live (n=196)



A slight majority of residents surveyed (46%) work in parts of Auckland outside NWR, while 44% work in NWR. Of those residents (n=87) who work in NWR, 44% are working for an organisation that provides services and/or products to visitors.

Nearly half (49%) of residents surveyed have lived in NWR for more than 10 years including 17% who have been in the area for over 25 years (Figure 31). Just over 20% of residents have lived in NWR for 6 to 10 years. Only 6% had been there for less than one year.

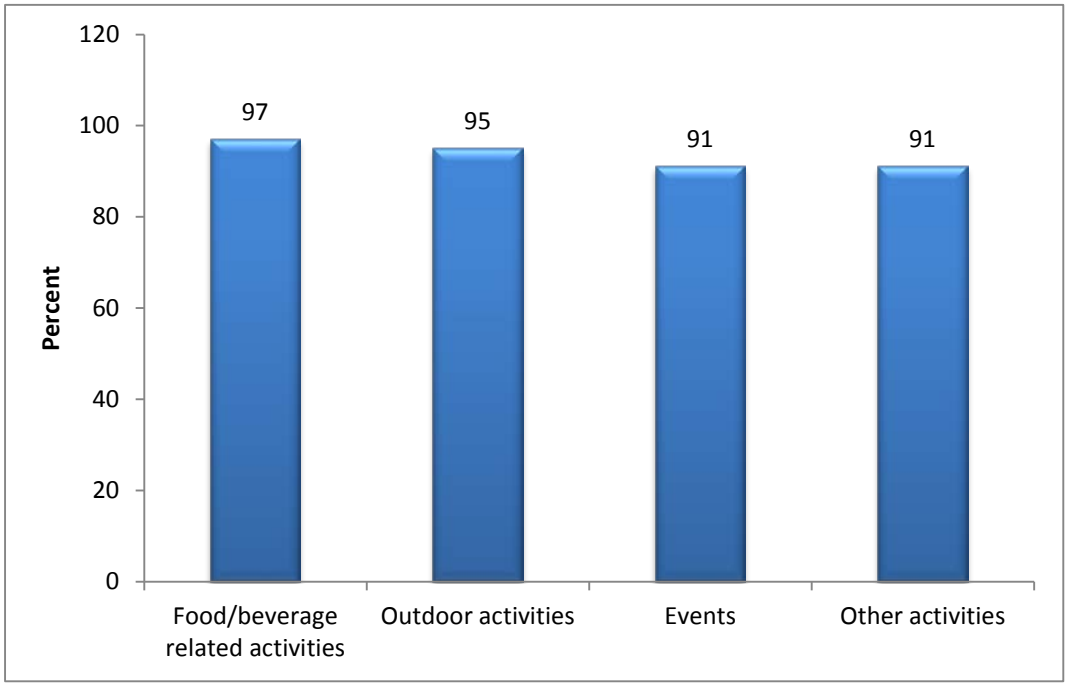
Figure 31: Number of years residents have lived in NWR (n=144)



Recreational activities

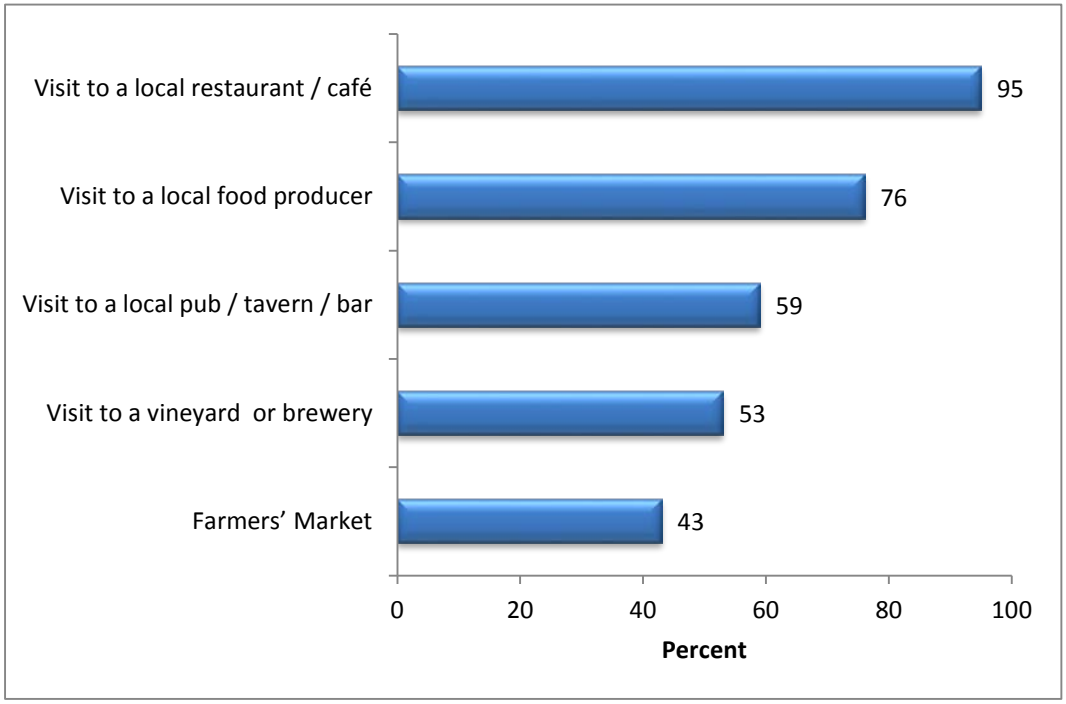
Residents make the most of the myriad of recreational opportunities at their door step with participation rates of over 90% for all four categories shown in Figure 32 Participation is highest in food / beverage related activities (97%), and outdoor activities (95%).

Figure 32: Types of recreational activities that residents regularly participate in (within the last six months) (n=195)



A visit to a local restaurant/café (95%) is by far the most popular pastime for the residents (n=190) who enjoy participating in food and beverage related activities (Figure 33). Local food producers are also well supported, with over three quarters of residents in this category having visited at least one in the last six months. Participation at local Farmers Markets is one of the lowest but is still quite high at 43%.

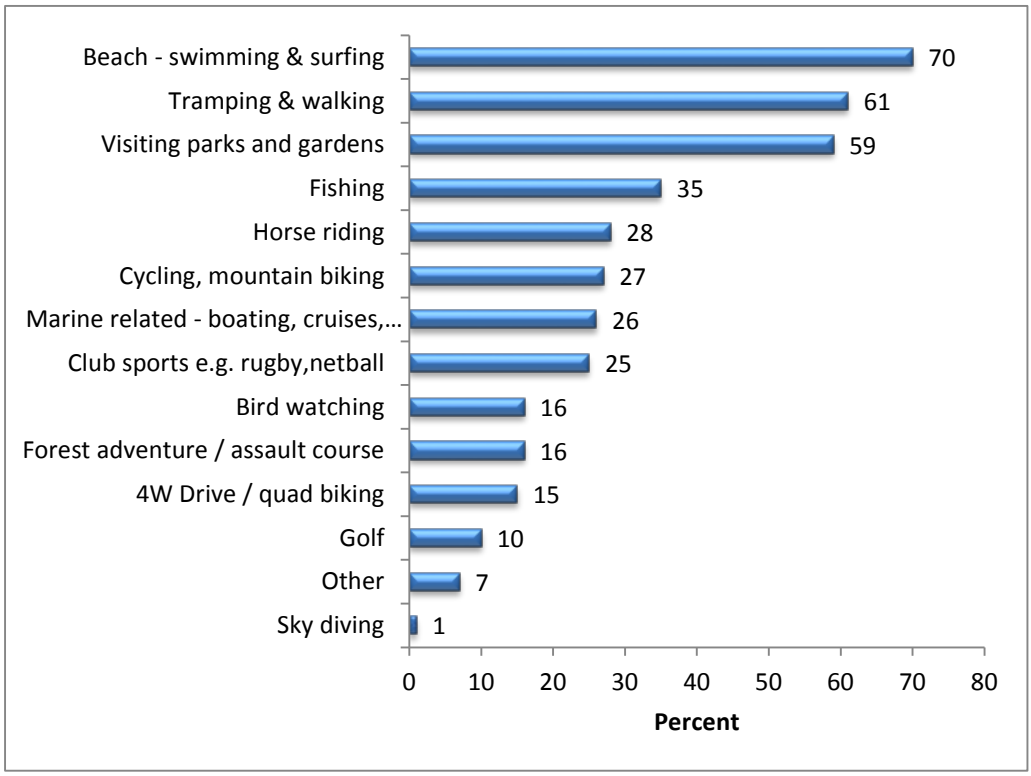
Figure 33: Types of Food and Beverage related activities that residents regularly participate in (n=190)



(Note, respondents could select more than one category so totals do not add to 100%)

For those residents (n=186) who participate in outdoor activities (Figure 34), it is the beach – including swimming and surfing which is the most popular option (70%). Many residents also like to get out walking and tramping (61%), while others opt to visit local parks and gardens (59%).

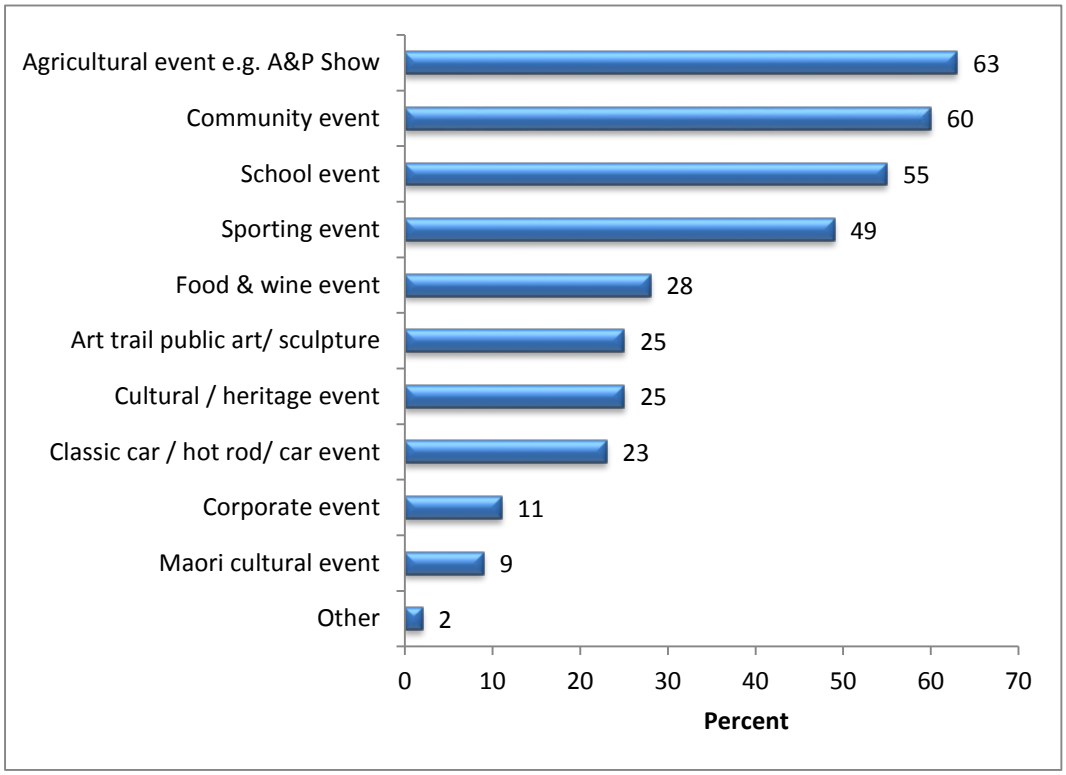
Figure 34: Types of Outdoor related activities that residents regularly participate in (n=186)



(Note, respondents could select more than one category so totals do not add to 100%)

Local agricultural events like the A&P Shows (63%) and other community events (60%) are the most popular activities for the residents to attend (Figure 35). School and sporting events are also well attended by those surveyed. The two types of events that residents participate in the least are corporate activities (11%) and Maori cultural events (9%).

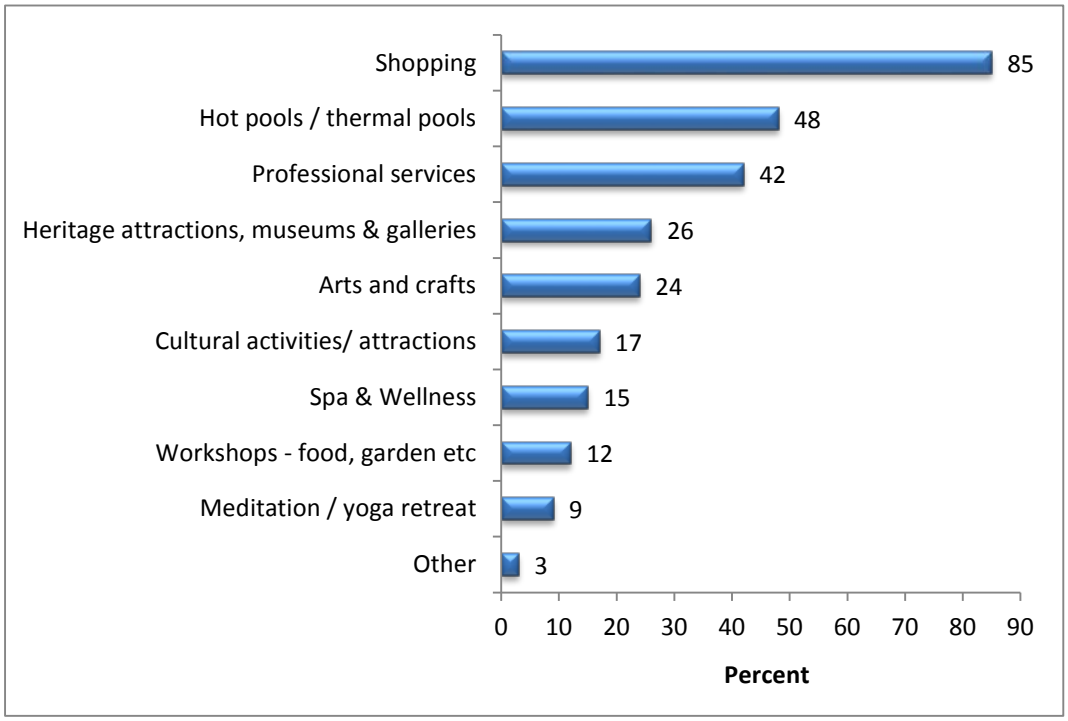
Figure 35: Types of Event related activities that residents regularly participate in (n=178)



(Note, respondents could select more than one category so totals do not add to 100%)

The other types of activities residents regularly participate in within the NWR area are shopping (85%), trips to the local hot pools (48%), and using professional services (42%). Lower participation levels are seen in activities such as trips to local heritage attractions, museums and galleries (26%), involvement in arts and crafts (24%) as well as cultural activities/ attractions (Figure 36).

Figure 36: Other Recreational activities that residents regularly participate in (n=178)



Resident attitudes towards living in NWR

Residents were asked to state the three most appealing aspects about living in NWR– there was a positive response, with **189** residents offering feedback, and a total of **660** comments. (Table 5).

NWR's natural environment, and the activities on offer account for just over half (52%) of the resident comments about what appeals to them the most.

Residents make the most of their **natural environment** with each area within NWR offering a unique experience (32% of all comments). Residents appreciate that they live in a diverse area, boasting forests, wildlife, and an extensive coastline with beautiful wild beaches, all set amongst a mainly rural landscape.

The natural environment also provides ample opportunity for a range of **recreational activities** to suit all age groups (20%). Residents enjoy activities like horse riding, bush walks, enjoying the local beaches, visits to local wineries, cafes and restaurants, and participating in community events.

Table 5: Most attractive or appealing about living in NWR for residents n= 189

Themes	% of comments
Natural environment	32
Activities on offer	20
Friendly and warm local community	16
Rural lifestyle	13
Accessible/proximity	5
Economic aspects	1

NWR residents feel a real sense of a **warm and friendly community** (16%), and use terms like 'village feel' ,'rural community feeling', 'connectedness', 'close-knit community' and 'small town friendliness' to describe their place.

> *The rural small town feel, despite encroaching development*
>
> *Historic Helensville is still a genuine community*

An integral part of this sense of community is the **rural lifestyle** (13%) - a place to raise a family with 'bigger sections for children and animals'. Residents like the relaxed lifestyle in rural areas that give children and their pets more freedom to enjoy the outdoors with a 'beach or forest a matter of minutes away'. Residents also appreciated this balance between 'town and country' lifestyle describing it as 'a slower pace of life', 'peaceful', 'quiet', 'uncrowded' and 'relaxing'.

NWR is seen as **accessible**, ideally located 'close enough, and far enough away from Auckland' based on many of the residents comments. The proximity to Auckland is seen as a bonus with one resident stating it was like "being separate from the urban city yet close enough to use its amenities". Motorway access makes the outside of 'peak hour commute' to Auckland less than 30 minutes.

Residents then were also asked for the three least appealing aspects about living in NWR. Again there was a good response with **189** residents offering feedback, and a total of **507** comments (Table 6).

Comments made by residents are very much in line with visitors' concerns, the main difference being residents highlight more issues on a regional level. Nearly two thirds (61%) of the residents comments focused on roading, traffic congestion, and the lack of infrastructure in NWR in general.

The state of the roads in NWR, the ongoing traffic congestion, and the lack of basics such as footpaths in certain areas, are all big issues for local residents (40%). Certain sections of State Highway 16 come under the spotlight especially locations like the intersection at Muriwai / SH16, with some describing it as 'a death trap'

Roads are terrible, worst in Auckland the recent HWY 16 upgrade is shameful

Comments were also made about "out of townies" and how NWR is "not far enough away from Auckland to stop heaps of people coming out at weekends".

A lack of infrastructure and public facilities (21%) was also highlighted by some – NWR was described by one resident as eastern Rodney's "poor cousin" in this respect. Residents commented on poor internet/ phone coverage, 'power outages', the lack of a local high school, and 'no free rubbish collection'.

The lack of public transport is seen as a big problem, especially for those that work outside the area. Residents consider the current public transport services as 'poor', 'unreliable' and 'expensive', or in many cases non-existent. The lack of train services for NWR was described by one resident as "totally backward thinking".

Table 6: Least attractive or appealing about living in NWR for residents n= 189

Themes	% of comments
Roading/ lack infrastructure/ traffic	61
Urbanisation and new developments	12
Socio economic issues	9
Lack of amenities / recreational activities	6
Accessible/proximity	4
Back water – forgotten by the Council	4
Unattractive and featureless townships	4

Continual growth and development in NWR is further compounding issues around roading, and local infrastructure (12%). Residents can see the changes happening with 'urban sprawl entering the area from Auckland'. Proposed high density developments and increased subdivision in the area makes residents feel like they are 'losing their lifestyle to development'.

[NWR] *seems to quickly becoming an 'urban dumping ground' with little thought to infrastructure and services and impact on existing communities*

Other less appealing aspects about living in NWR include the rising cost of living, increased petty crime and lack of local employment opportunities. Other residents comments (4%) were about the "proximity to main centres like Auckland" as being a problem as well as the daily commute to work via SH16, and distance to most amenities.

The lack of amenities and recreational activities especially for youth, were highlighted (6%) by some respondents. Residents noted the absence of amenities like retail shops, supermarkets, banks, parks, events, local attractions and youth services.

A small percentage of comments (4%) indicate that some residents feel NWR is forgotten by Auckland Council especially in terms of new infrastructure for the area. Residents commented that NWR does not appear to be benefiting from the rates they pay, with their money going to other areas for roads, local parks and amenities.

> *It* [NWR] *continually gets left off the radar for Auckland planning and we struggle to get traction*

Sharing local experiences

Over 80% of residents (n=193) surveyed responded that they know of some attractions/activities in their local area that they think visitors would be interested in seeing/participating in (Table 7). Around 190 residents were happy to give suggestions of things to do or see in their area, with many offering more than one.

Nearly half the comments made by residents (42%) about local attractions to highlight to visitors are about Muriwai Beach and the gannet colony. The beach and bush especially on the west coast is viewed as another visitor attraction to the area (28%). Residents highlighted the range of activities available in NWR that would appeal to visitors, such as the wineries and vineyards, adventure activities in Woodhill and the local cafes, pubs and restaurants.

Cultural activities ranked below attractions which feature the natural environment, and the recreational opportunities for visitors.

Table 7: Local attractions things to do, places to visit to highlight to visitors (n=189)

Local attractions	Comments	%
Muriwai Beach and gannet colony	80	42
Beach and bush	53	28
Wineries and vineyards	49	26
Woodhill adventure and recreation	49	26
Cafes, pubs and restaurants	38	20
Other outdoor activities – kayaking, horse riding surfing, golf, fishing, tramping, hunting etc.	38	20
Events, festivals, shows and markets	35	19
Culture, heritage, history, arts and gardens	32	17
Parakai and hot pools	29	15
Kaipara Harbour – boating and fishing	11	6
Other – hotels, farming activities, meditation	11	6

According to residents, the most appealing aspects about NWR to promote to visitors are outdoor activities (31%) set amongst the natural surroundings (27%) of forests, beaches, coastline and rural landscape (Table 8).

Gastronomic attractions are also seen as a big attractor for NWR with plenty on offer from cafes, restaurants, wineries, markets, vineyards, and local produce to buy.

> [NWR is a] *proud wine country, with small boutique wineries with history*

Residents also want to promote the peaceful rural lifestyle (12%) with its open spaces and quietness. Another appealing aspect that residents believe visitors would appreciate is the sense of local community (8%) with many of the townships having a 'real village feel' about them. There are also community events and activities for visitor to participate in like the local A&P shows and school fairs.

Table 8: The most attractive aspects about NWR as an area to promote to visitors n= 163 Comments =556

Themes	% of comments
Outdoor activities on offer	31
Natural environment	27
Gastronomic attractions	15
Peaceful rural lifestyle	12
Sense of local community / activities	8
Heritage attractions	4
Accessible/proximity	3

Some of the residents (4%) feel the area's heritage could be promoted to bring visitors to the area. Helensville was highlighted as a place of interesting built heritage, and some residents wanted to highlight Marae and Pa Sites.

The close proximity to Auckland is always a strong selling point to encourage visitors to come for a whole day out, or half a day. With extensions to the motorway, NWR is now easier to access especially in off peak times over the weekend. Visitors can enjoy "the rural lifestyle and attractions just 40Km from Auckland's downtown".

Heritage and cultural experiences

Ngāti Whātua o Kaipara wanted to know if local residents would be interested in experiences that share their tribal heritage and culture. Of the residents (n=174) who gave feedback, 61% would like to have this opportunity.

Of the residents (n=106) who are interested in learning more about Ngāti Whātua o Kaipara's tribal heritage and culture, three quarters (74%) of the comments relate to the fact this is part of the local area's history and culture. As local residents they would like to 'feel more connected with the place' where they live. From a cultural perspective - one resident commented, this is an "important part of New Zealand's culture and greater understanding will help build a better relationship".

Beyond their own interest in Ngāti Whātua o Kaipara heritage and culture, some residents (5%) are also interested in the opportunity to share this experience with visitors especially those from overseas. Comments were made that currently there is nowhere in NWR to take visitors to for this type of experience.

For the residents (n=68) with no interest in this type of cultural experience, over half are simply 'not interested'. Others (12%) feel they have had this experience in other places in New Zealand:

> *I have seen these things in Rotorua and museums*
>
> *I prefer to see these kind of things when I am out of my area on holiday*

Residents were then asked if they would consider taking visiting friends and relatives to such an experience, if it was offered. Nearly 70% of the respondents (n=120) indicated they would, which is slightly higher than resident's interest in this experience for themselves. This shows the 'host effect' with the need to entertain visitors leading residents to partake in new experiences.

Of the residents (n=103) who added comments about why they would take visitors to this type of experience, over half stressed that **local history and culture** of the Kaipara area was the highlight – "not the Rotovegas plastic kind". Comments were also made about overseas visitors in particular having "a greater interest in Maori culture than New Zealand Pakeha".

> *Frequently have overseas visitors and would take them if it was something was of quality and worthwhile*
>
> *Definitely when you go somewhere new you want to learn about the history and to hear it from the local tribal ancestors.*

As the Ngāti Whātua o Kaipara heritage and culture 'experience' is not actually defined, some of the comments (10%) made by residents pointed out that they would need to know more about the concept first. If they felt the 'experience' would be good quality, interesting and informative for their guests, they would be happy to take them along. Over 10% of comments simply talked about a general interest in taking people to this type of cultural experience – "why not" and "that is something to do".

Just over 30% of residents (n=54) stated they would not be interested in taking friends and relatives to experience Ngāti Whātua o Kaipara heritage and culture. Of the 31 residents who added a reason, over a third of the comments simply confirmed that as they had no interest in it; they would not take their guests either. Another 16% of comments spoke about residents preferring to take their visitors to Rotorua for this type of 'cultural experience' or to the Auckland museum. A couple of residents commented that they would prefer to take their guests to other attractions in the area over going to a 'cultural experience'.

Attitudes towards the visitor industry

Residents were asked to list the three most positive impacts associated with visitors coming to NWR (Table 9).

Several residents (13%) noted the positive impact of more visitors coming to NWR having a flow on effect with more local industry, new businesses emerging and a general 'improved image' of the area in general. This revival of the area, all helps NWR to better compete with other neighbouring regions as a visitor destination.

Economic benefit to the local community is seen as the most positive aspect of visitors coming to the area (56%), and included revenue generation (21%), business opportunities (17%), and job creation (15%).

Some residents (13%) felt the most positive impact of visitors coming to the area was the improvement of infrastructure /facilities as a result. These residents noted improvements such as better roading, more public transport options, signage benefiting both residents and visitors, and recreational spaces like parks.

Several residents (13%) noted the positive impact of more visitors coming to NWR having a flow on effect with more local industry, new businesses emerging and a general 'improved image' of the area in general. This revival of the area, all helps NWR to better compete with other neighbouring regions as a visitor destination.

Table 9: Most positive aspects of visitors coming to the area n= 145 comments=345

Themes	% of comments
Beneficial to the local economy	56
Improvement of infrastructure/ facilities	13
Promotion of the area/ greater awareness and appreciation by residents	13
Increase of competitiveness as a destination	13
Greater exposure to a diversity of people and cultural exchange	5

Local residents were also asked to outline the negative impacts they associate with visitors coming to the region (Table 10). Of the comments (n=276), 40% focused on 'traffic and congestion' issues. Another 20%, stated that visitors add to the pressure of the already 'poor infrastructure' in NWR. A further 16% of comments dealt with the environmental damage caused by visitors to the region, with residents mentioning pollution, rubbish, noise, and a disregard for the local flora and fauna as key concerns. Comments were also made about a

general unease with the rising levels of petty crime, thefts, and accidents on the roads which are becoming more common as more people come through the area (16%).

Other comments concerned the loss of the 'community feel' and 'character' of NWR, with some describing it as the loss of a rural lifestyle (6%) due to things like new developments taking place, and again, a growing number of people in the area. A few comments were made about the high living costs (2%) with house prices, rates etc. all on the rise.

Table 10: Most negative aspects of visitors coming to the area n=138 comments=276

Themes	% of comments
Traffic and congestion	40
Pressure on infrastructure and resources	20
Damage the environment	16
Rise of insecurity	16
Loss of sense of place	6
Higher living costs	2

Residents were asked to respond to a number of statements about the impacts of visitors on the region on a scale of 1 (strongly disagree) to 5 (strongly agree) (Figure 37). The majority of respondents feel that visitors are good for the region's economy (4.5 out of 5), and that visitors coming to the region stimulate employment opportunities for residents (4.1). There is less agreement with the statement that the region is overcrowded during the summer season (3.6). Residents have more of a neutral stance on the two remaining statements rating these below a mean of 3.5: increased visitors lead to better maintenance of public facilities (3.3), and that visitors have a negative impact on the environment (3.0).

Figure 37: Resident responses to statements about the impact of visitors to the region (n=156-158)

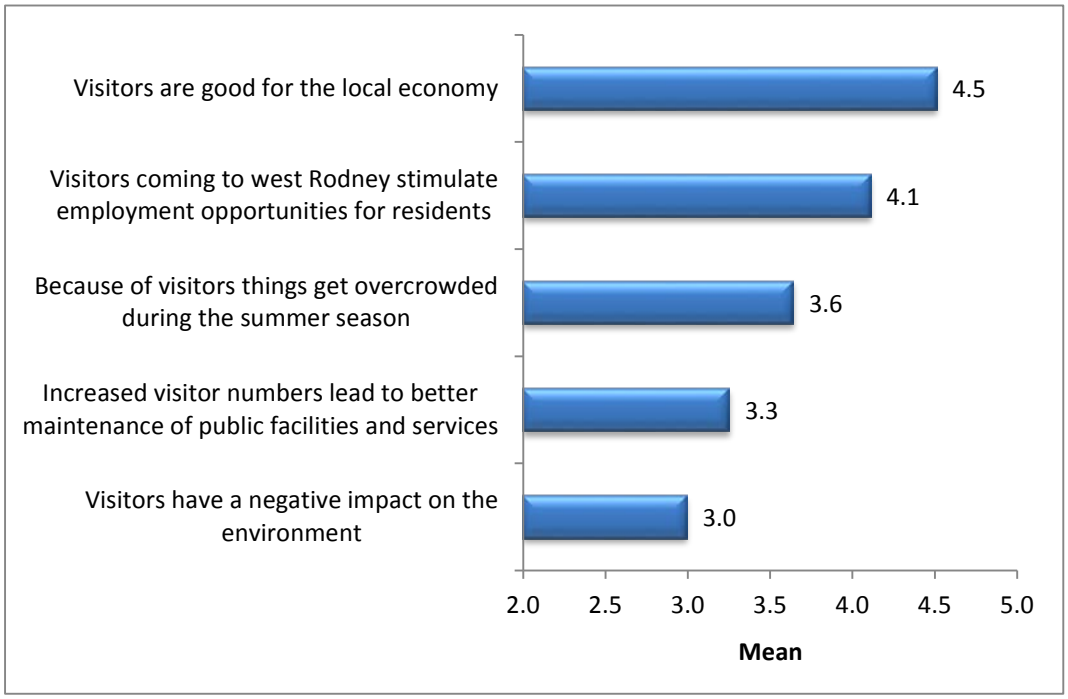
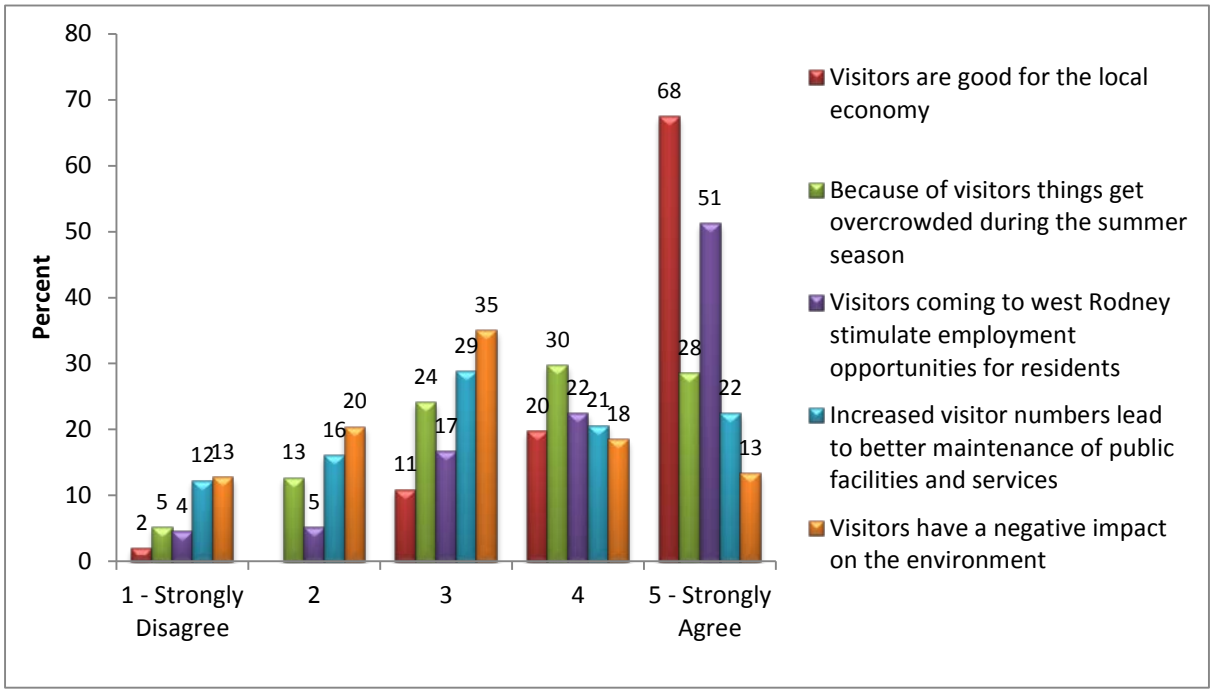


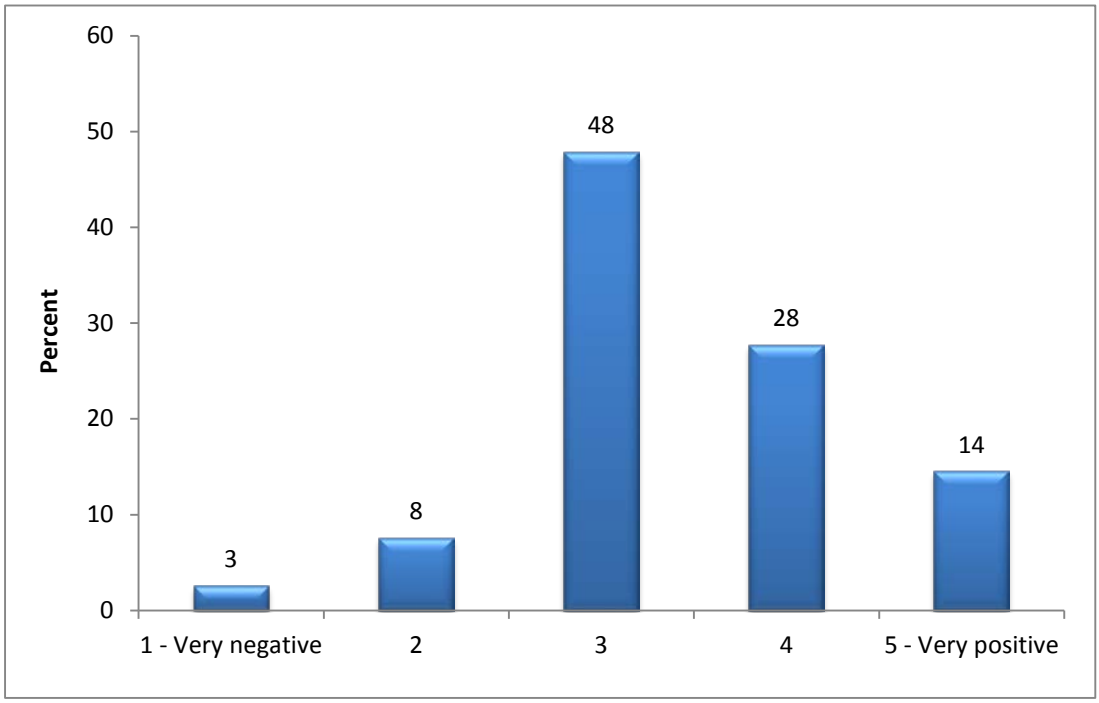
Figure 38 highlight areas where there is strong agreement, or disagreement, about the impact of visitors to the region. The majority of residents strongly agree that visitors are good for the local economy (68%) and stimulate employment opportunities for locals (51%). Around a third (30%) agree that because of visitors coming to NWR in the summer that things get overcrowded. On the other end of the scale, the two statements that residents strongly disagreed with are that more visitors to NWR lead to better maintenance of public facilities and services (12%), and that visitors have a negative impact on the environment (12%).

Figure 38: Combined resident responses highlighting the impact of visitors to the region (n=156-158)



Residents were asked to describe the impact of visitors to the area on their quality of life, using a scale of 1 - very negative to 5 - very positive. The mean score was 3.4. Just over 40% of residents felt visitors had a positive impact on their quality of life (Figure 39). Nearly half (48%) of respondents feel that tourism is neither good nor bad in terms of its impacts on the region. Only a small percentage (11%) felt visitors had a 'very negative' (3%) or 'negative' impact (8%) on the quality of their lives.

Figure 39: The impact of visitors to the area on residents quality of life - mean score = 3.4 (n=159)



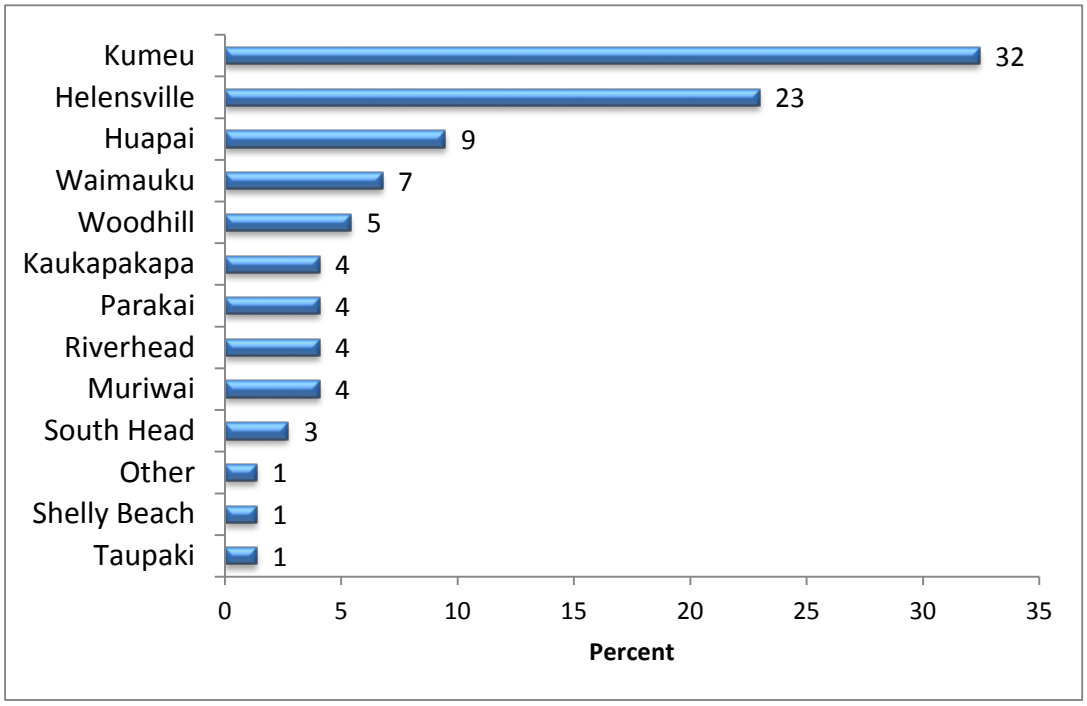
Business Survey: Findings

This section discusses the characteristics of businesses that responded to the survey including their location, years in operation and primary area of activity, staffing, revenue, costs and linkages. Respondents give their thoughts on how well businesses work together in NWR, business associations and industry networks, and ways to promote the area. The final discussion looks at business confidence levels for the next 12 months.

Business characteristics

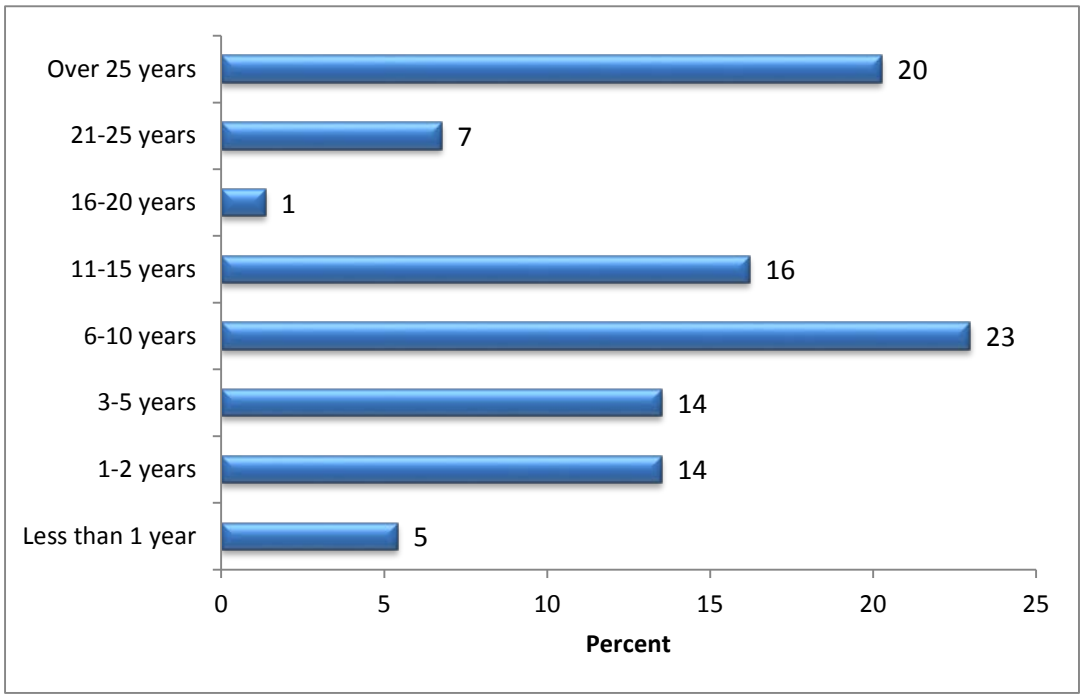
One third (32%) of businesses surveyed are located in Kumeu with another quarter (23%) in Helensville (Figure 40). All operate throughout the year.

Figure 40: Location of businesses (n=74)



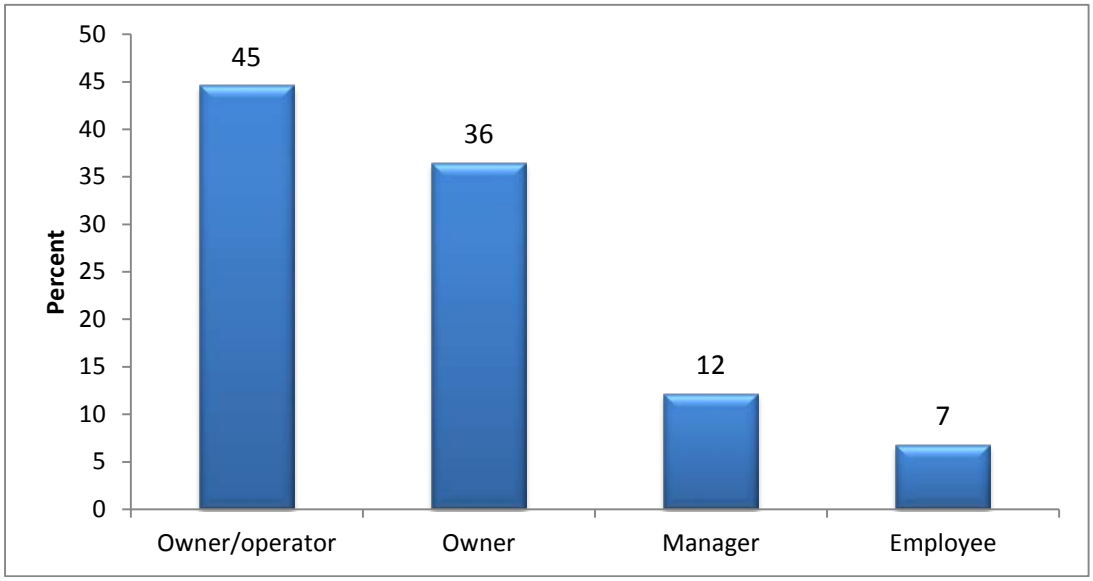
Just under one quarter (23%) of businesses surveyed have been operating in NWR for 6-10 years (Figure 41). Forty-four percent of businesses surveyed have been in operation for more than 10 years; of those 20% have been operating for more than 25 years.

Figure 41: Length of business operation in NWR (n=74)



The majority of respondents are owner/operators (45%) or owners (36%) of the business; 12% are managers and 7% are employees (Figure 42).

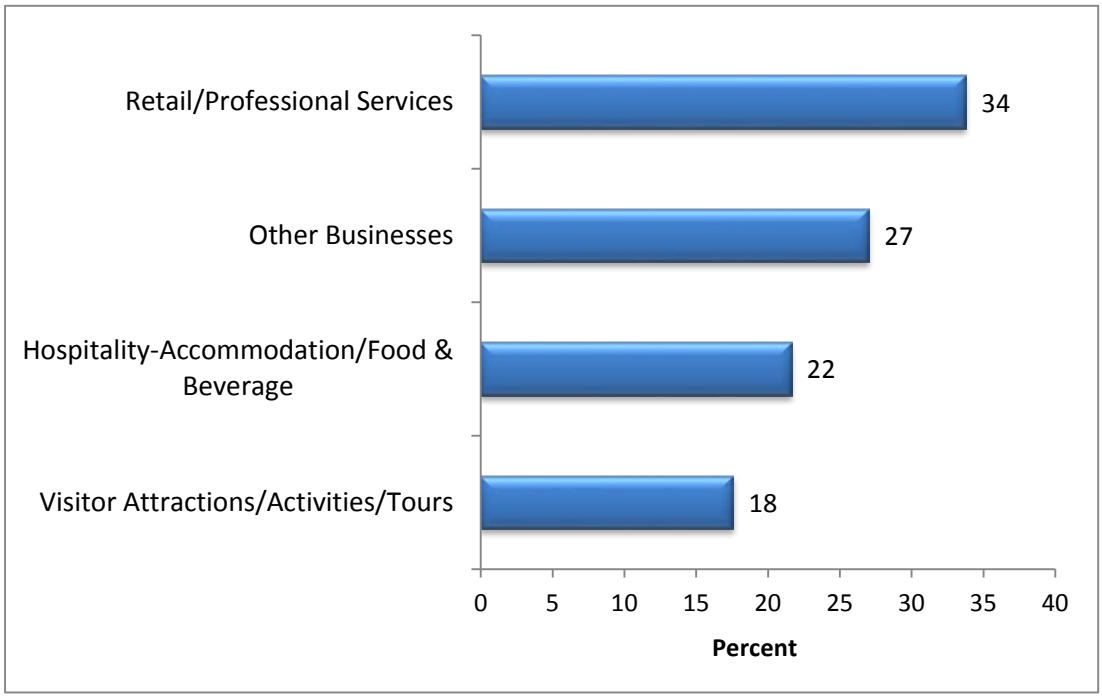
Figure 42: Role in the business (n=74)



The majority (82%) of business survey respondents are permanent residents of NWR.

Forty percent of businesses are directly related to the visitor industry with 22% having 'hospitality' and 18% having 'visitor attractions/activities/tours' as a primary focus (Figure 43). Just over one third (34%) of business respondents indicated that 'retail/professional services' is the primary focus of their business.

Figure 43: Primary focus of businesses (n=74)



Of the 16 respondents with a primary focus on the 'hospitality' sector, half describe their business as farm/home stay/Bed &Breakfast accommodation. The remainder were involved in wine making and sales, food manufacture and as providers of venues for functions and weddings. Secondary activities listed for the hospitality sector include: café; hotel/event centre; and natural thermal water pools.

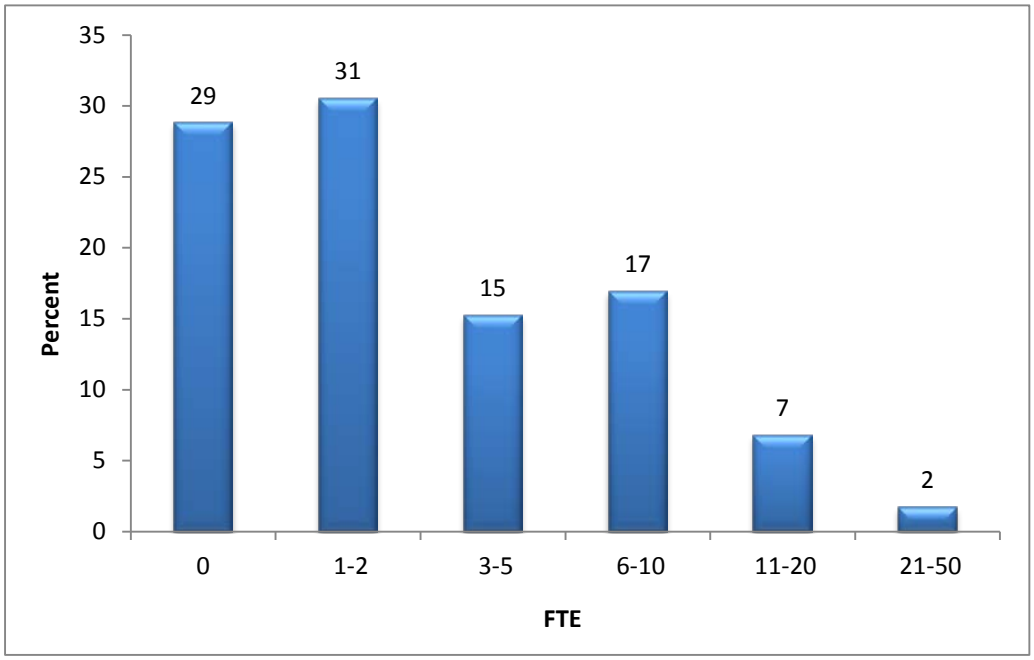
Thirteen business respondents were in the 'visitor attractions/activities/tours' including equestrian related businesses, tour operators, sports clubs, arts and crafts, adventure tourism, vineyards, and coastal/marine activities. Secondary activities listed for the 'visitor attractions/activities/tours' category include: nursery/café/landscape architecture, hospitality, and marine repairs.

Respondents in the 'retail/professional services' category (34%) include businesses in retail/shopping and property services and 'other' sectors such as gardening, marketing and accounting. Of the 20 respondents who indicated their business' primary focus is 'other business sectors' the majority listed 'other' primary foci such as construction, horticulture, and early childhood education.

Staffing, revenue, costs and linkages

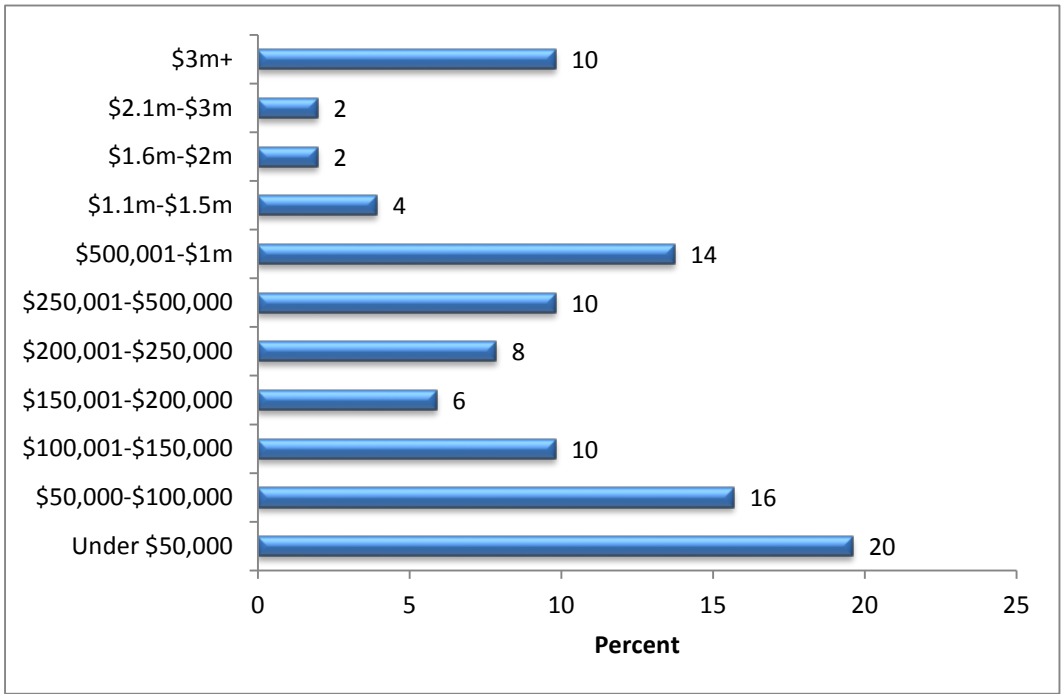
The majority of businesses surveyed are small to medium in size with just under one third (29%) of respondents reporting that they are the sole owner/worker in the business (Figure 44). Another third (31%) one or two additional full time equivalent employees.

Figure 44: Number of full time equivalent employees (FTE) (excluding respondent) (n=59)



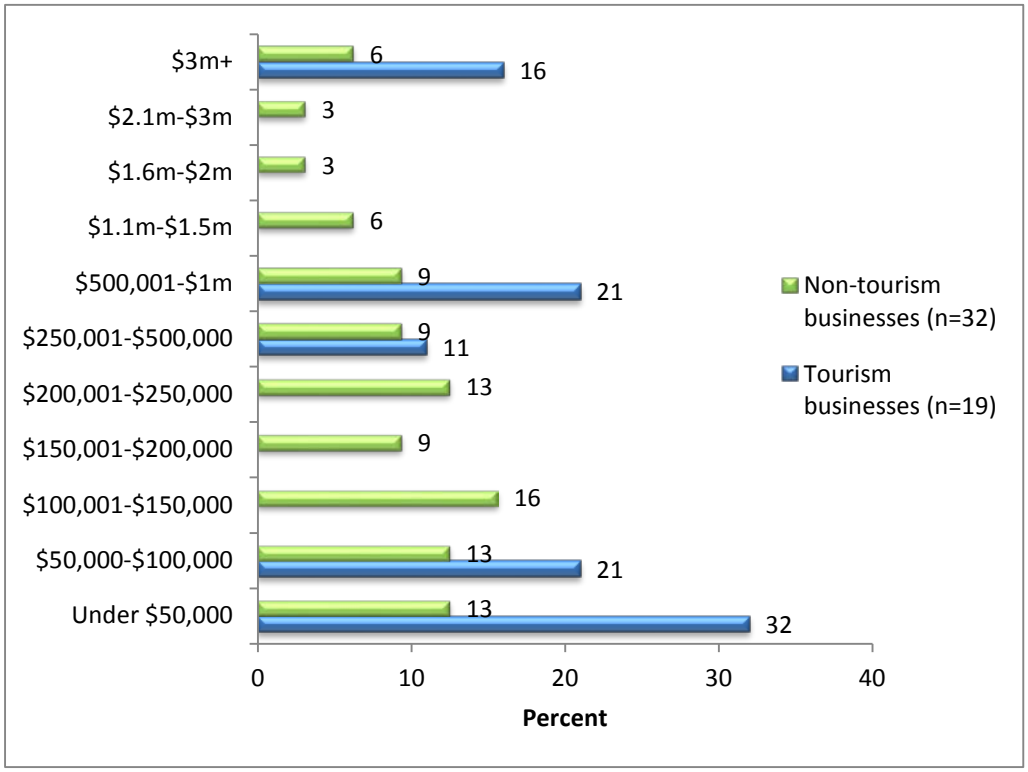
Just over one third (36%) of business respondents reported an annual turnover of $100,000 or less in the last financial year (Figure 45). Eighteen percent reported an annual turnover of $1.1m or more. Nearly a third (31%) of respondents opted not to answer this question.

Figure 45: Business annual turnover in last financial year (n=51)



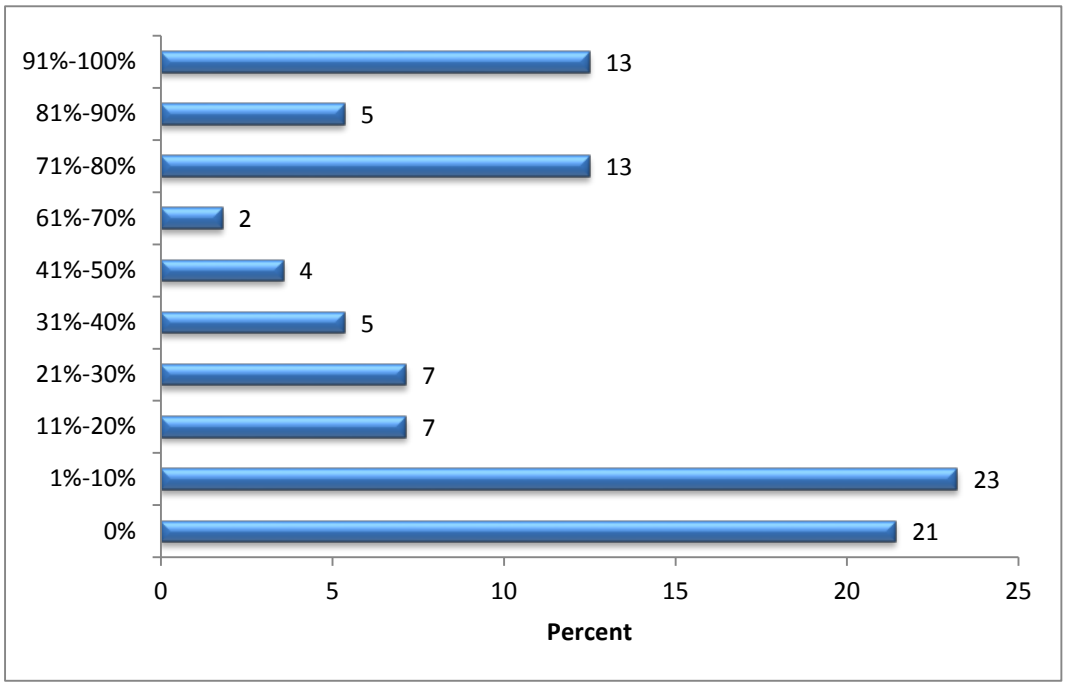
Just over 20% of tourism businesses (n=19) have an annual turnover of $500,000 to $1million, with a further 16% reporting an annual turnover of above $3million (Figure 46). Half of the tourism businesses are in the lower bracket with an annual turnover of under $100,000.

Figure 46: Business annual turnover in last financial year



Two thirds (67%) of business respondents (n=56) attributed up to 50% of their annual turnover directly to the visitor industry (Figure 47). For one third (33%) of businesses, the majority of their annual turnover (61%-100%) comes directly from visitors.

Figure 47: Turnover generated directly from visitors outside the immediate area (n=56)

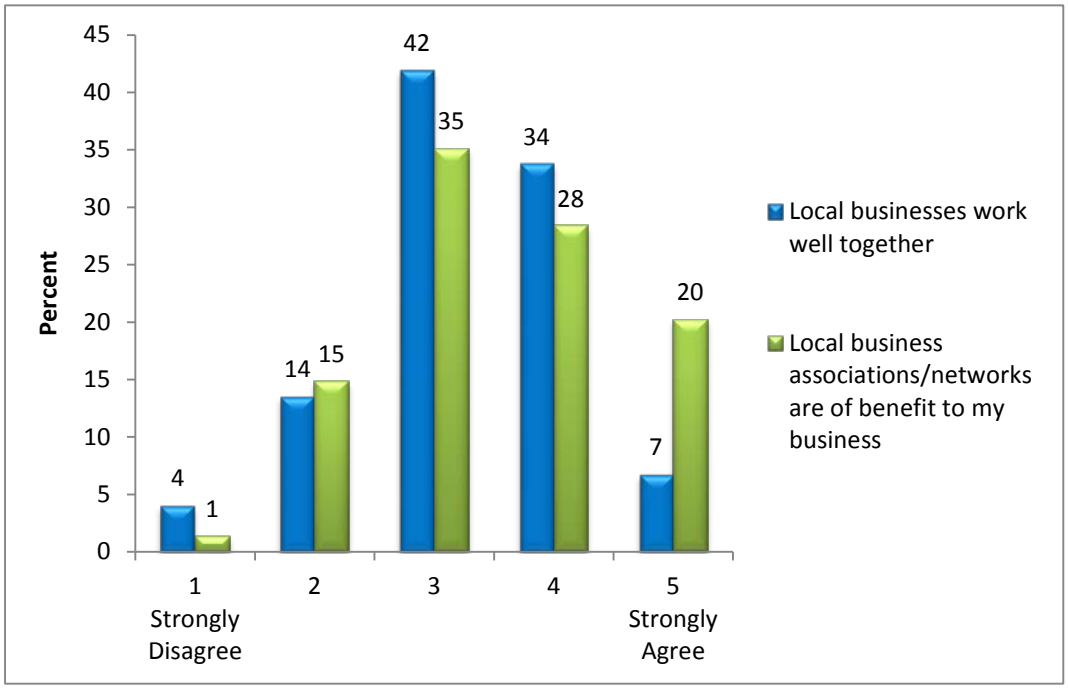


Business/industry networks

Good levels of collaboration and business networking are vital elements of a high performing visitor industry. In order to develop local approaches to enhance the visitor experience and maximise visitor yield, there needs to be a coordinated approach to tap into the full potential of the visitor economy.

Business respondents were asked to respond to two statements about how well businesses work together and whether they thought that local business associations and networks were of benefit to their business (Figure 48). While 48% agree/strongly agree that local business associations/networks are of benefit to their business, only 7% of respondents strongly agree that local businesses work well together; however another 34% somewhat agree.

Figure 48: Levels of agreement with statements about local networks/collaborations (n=74) Mean: 3.3 / 3.5



Respondents were asked to list any business networks/associations or industry organisations that they currently belong to (n=45) and these are summarised in Table 11.

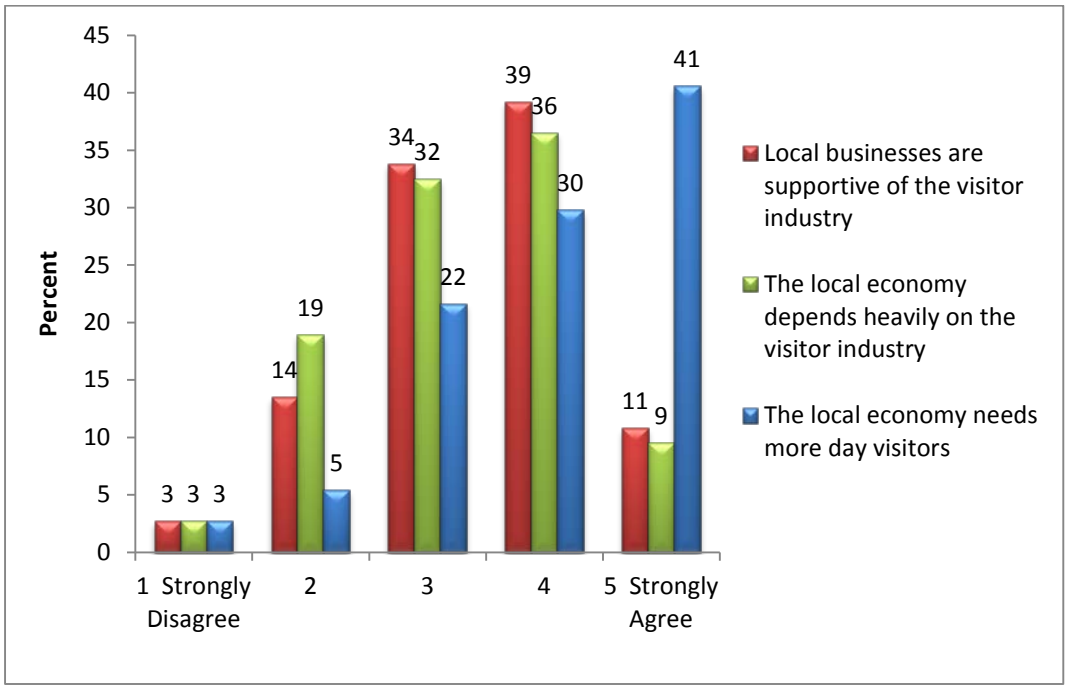
Table 11: Membership of business networks / associations or industry organisations (*n=45)

Organisation	No.*		No.
Auckland Tourism Events and Economic Development	4	Tourism Organisations (TIANZ/TNZ/Rodney Tourism/Destination Kaukapakapa	4
Business Improvement District	2	Ratepayers Association	8
Employers and Manufacturers Association	2	Restaurant Association	3
Local business groups (North West District Business Association/Kaukapakapa business group)	8	Wine-related (Kumeu Wine Country/West Auckland Wine Growers)	5

**Other n=9*

While there is some ambivalence about the current role of the visitor industry and levels of industry support in NWR, there is a clear sense that more tourism would be valued with 71% of respondents who agree/strongly agree that the local economy needs more day visitors (Figure 49).

Figure 49: Using the following scale of 1 (Strongly disagree) to 5 (Strongly agree) please respond to the following statements about local businesses and the visitor industry (n=74) Mean: 3.4 / 3.3 / 4.0



Respondents were asked if they had any suggestions on the ways in which local businesses could support each other to attract more visitors to the area. Just over half (52%) of respondents provided a suggestion (Table 12).

Table 12: Ways business can support each other (n=32)

Themes	No. of Comments	%
Networking and collaboration	16	50
Miscellaneous	7	22
More accommodation	4	13
Transport	4	13
Increased opening hours	3	9
Information centre	3	9

The suggestions mainly focussed on issues around networking and collaboration to attract visitors.

> *Cross promote each other, encourage visitors to go on a 'trail', to go to cafes, other businesses, etc.*

Other suggestions focused on increasing the capacity for hosting and transporting visitors to the region, as well as a need for more visitor information and an extension of opening hours to accommodate visitors.

> *More visitor accommodation is required in the district*

> *Bring back the information centre in Kumeu. Was very important for area for visitor information*

> *Stay open especially on holidays and weekends when visitors are in town.*

Enhancing the visitor experience

Respondents were asked to list up to three local attractions they would highlight to visitors coming to the area. The majority (63%) of respondents would highlight Muriwai beach and the gannet colony, with just under half (46%) of respondents mentioning wineries and vineyards (Table 13). Thirty-seven percent equally highlighted cafes, pubs and restaurants for food and beverages and Woodhill Forest for the outdoors and various recreation options. The Kaipara Harbour was highlighted by one third (34%) of respondents for its great fishing, cruising and tours including visits to nearby places South Head and Shelly Beach. Another third (31%) wanted to highlight the cultural and artistic aspects of the area such as museums, heritage, arts and gardens.

Table 13: Local attractions things to do, places to visit to highlight to visitors (n=65)

Local attractions	Comments	%
Muriwai beach and gannet colony	41	63
Wineries and vineyards	30	46
Cafes, pubs and restaurants	24	37
Woodhill outdoors and recreation	24	37
Kaipara Harbour, South Head and Shelly Beach	22	34
Museums, heritage, arts and gardens	20	31
Parakai and hot pools	18	28
Other	11	17
Beaches	10	15

Just over one quarter of respondents mentioned Parakai including the thermal pools and adventure activities such as skydiving. 'Other' (17%) included various things to do and places to visit such as the Sky Golf Range, clay target shooting and Mataia Homestead in Glorit. A further 15% commented on beaches in general.

Respondents were asked if they thought having a visitor experience/tourism offering based around the culture and heritage of Ngāti Whātua o Kaipara would be of benefit to NWR's economy. Nearly three quarters (73%) of business respondents (n=70) think that it would be of benefit; 27% do not.

Of those respondents who thought the Ngāti Whātua o Kaipara visitor experience would be of benefit to the region, 46 provided further comments. One third of the comments noted that visitors (especially overseas visitors) are interested in experiencing local culture and that Maori culture is a good draw card.

> *Because half of our clients are from overseas and the Maori Culture is what they are interested in and nature*
>
> *It would add another dimension to the visitor experience*
>
> *Of course, what a great draw card for the area!*
>
> *The 'Thinking Tourist' values cultural experiences*

One quarter (26%) of respondents felt such an experience would open up Rodney's culture and history to visitors and locals alike.

> *Culture and heritage AND history is an important aspect of NWR*

Another point highlighted by respondents (17%) was that an experience of this nature would increase what is on offer, attract more visitors and in turn generate more business.

> *More tourists would open job opportunities. Also more business opportunities*
>
> *It would keep tourist in the area, rather than having to go elsewhere to experience Maori culture*

For those respondents (27%) who did not think the Ngāti Whātua o Kaipara visitor experience would be of benefit to the region's economy, 14 respondents commented further. The main issues raised were that such an activity would not be viable due to visitors mostly coming for recreational purposes and the fact that Maori cultural experiences already are on offer in many other locations such as Auckland Museum and Rotorua.

Business respondents were also asked to indicate what new businesses/activities/events or experiences (if any) they thought would enhance the NWR area as a visitor destination (Table 14). The majority of suggestions related to trails, walkways, and recreation (24%), accommodation (22%), and food and beverage (22%).

Table 14: The types of new businesses / activities / events or experiences that would enhance the NWR area as a visitor destination (n= 51)

Themes	comments	%
Trails, walkways, recreation	12	24
Accommodation	11	22
Food and beverage	11	22
Other	7	14
Tours	7	14
Arts, crafts and gardens	6	12
Children and family activities	6	12
Culture and heritage	6	12
Information	5	10
Transport	5	10
Festivals and events	4	8
Retail and shopping	3	6

Respondents (24%) mentioned more and better tracks and trails for walking/cycling for both locals and visitors.

> *Better paths to enable locals and visitors to walk and cycle and explore the local area*

They also noted a need for more capacity, variety and quality in the accommodation offerings (22%).

> *More places for tourists to stop off and visit and stay the night in decent accommodation if needed*
>
> *There are absolutely NO MOTELS in the area between Hobsonville and Helensville/Parakai*

Food and beverage options were also mentioned such as better quality restaurants and cafes, promotion of local produce as well as longer opening hours.

> *Needs a better mix of more upscale businesses that highlight local produce e.g. venison, seafood and sites*
>
> *More quality cafes open longer hours*

Fourteen percent of respondents mentioned new tours such as harbour tours, arts, and wineries, and offered ideas for other new experiences:

> *Arts Tours (Artistsan Trail) and the Steam Train coming to Helensville for 6hrs in which people do the Artisan Trail and eat*
>
> *Organised annual winery tours with buses between venues. More emphasis placed on the area as Auckland's most beautiful playground*
>
> *Tour guides along beach down through Kaipara harbour would be awesome!*
>
> *More sophisticated boating experience on the Kaipara Harbour*

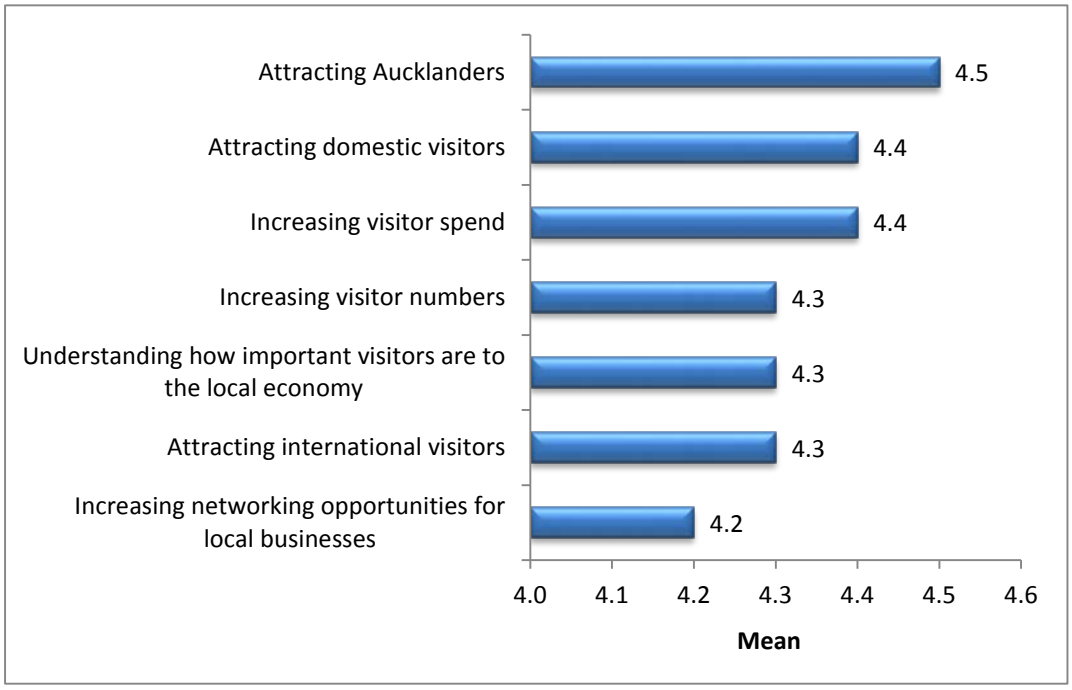
Arts/crafts/gardens (12%), children/family activities, and culture and heritage also featured in the suggestions made by business respondents:

> *Celebrate our artists, arts training and exhibition facility*
>
> *Children's activities i.e. ice skating, roller skating, skate board ramp, movies in Helensville*
>
> *Trains similar to Glenbrook*
>
> *Wine Museum detailing Croatian migrant history*

Other ideas included providing more visitor information, improved transport to the area, festivals and events, and retail and shopping.

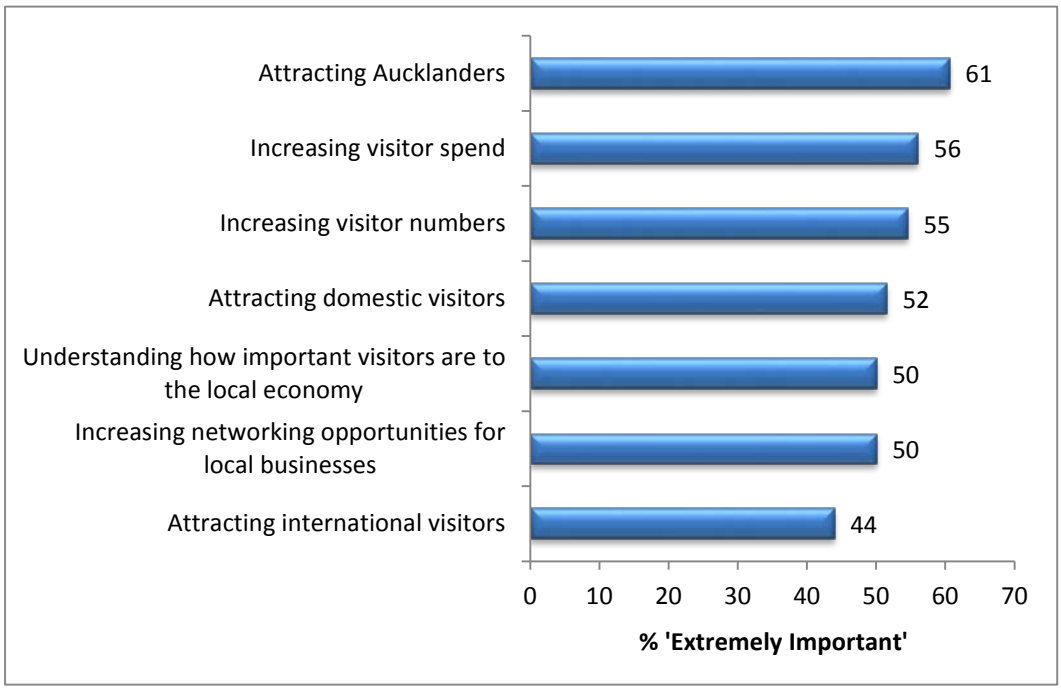
When considering priorities for the visitor industry; business respondents believe it is important to attract Aucklanders to the region (mean 4.5), attract domestic visitors (4.4), and increase visitor spend (4.4) (Figure 50). They also consider it important to increase visitor number (4.3), to understand the role of the visitor industry (4.3) and attract international visitors to NWR (4.3). Increasing networking opportunities for local businesses is also important (4.2 out of 5).

Figure 50: Priorities for the visitor industry in NWR: How important businesses believe each statement is for NWR (n=66) – mean score presented



If we take only those respondents who rated each statement as 'extremely important', it is evident that business respondents find it most important for NWR to attract Aucklanders (61%), compared to attracting domestic (52%), or international visitors (44%) (Figure 51). Increasing visitor spend (56%) is also high on the list.

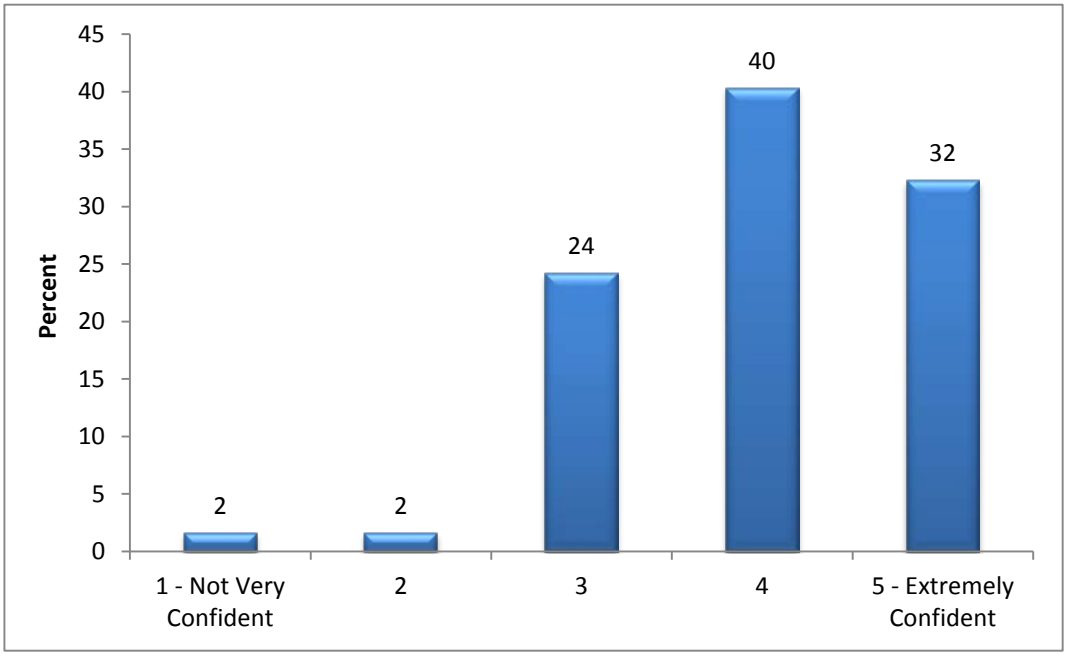
Figure 51: 'Extremely important' responses (n=44-61)



Business confidence

The majority (72%) of business respondents are confident that their business will do well in the coming year (Figure 52). One quarter (24%) are neutral/unsure and only 4% are not confident about the coming year.

Figure 52: Business confidence levels over the next 12 months (where 1 = not very confident, and 5 = extremely confident) (n=62)



Respondents were asked to list what they believed to be the 'major opportunities' for their business in the next five years (Table 15). The majority of respondents attributed the growing local population (40%) and increased urbanisation of the NWR area as major opportunities for business development and growth (46%). The potential to attract more visitors to the area (local customers as well as domestic/international visitors) was also mentioned as a major opportunity for local businesses (37%).

Table 15: Major opportunities for business in the next five years (n=52)

Themes	comments	%
Business development and growth	24	46
Growing local population	21	40
More visitors	19	37
Other	18	35
Specific offerings	12	23
Awareness and promotion	10	19
More housing and local development	8	15
Public transport	6	12
Business networking and collaboration	5	10

One quarter (23%) of respondents talked about specific offerings in the area that would create opportunities such as enhancing the visitor experience, more activities, trails, events, accommodation experiences and opportunities to attract 'more Aucklanders'. Increased awareness and promotion was mentioned by 19% of respondents. This included advertising, optimised online searching, increased exposure and awareness of the NWR area as a destination close to Auckland.

Along with a growing local population there are also opportunities that more housing and local developments (15%) will bring to the area. Improved public transport was highlighted as an opportunity by 12% of respondents – clearly inadequate transport to the region is seen as a barrier.

Some respondents (10%) also acknowledge the opportunities that lie in business networking and collaboration.

> *Working with other local businesses to find more things to attract people to the area to make visiting our area a great day trip.*
>
> *Partner with other businesses to offer package deals*

Respondents were also asked to comment on the three major challenges that they see their business facing in the next five years. Fifty-one respondents provided comments (Table 16).

'Infrastructure' was listed by 47% of respondents as the one major challenge for their business. This included issues such as roading, public transport, traffic, internet access, parking around shops, and access to the area.

Being by-passed as the new Puhoi Expressway is built

Traffic volumes and difficult access to retail areas

Traffic congestion due to infrastructure not being improved

Over one third (35%) of respondents highlighted council and government plans and regulations, i.e. 'red tape' as major challenges. Another third (35%) highlighted day-to-day issues of running a business and keeping afloat as a challenge. This included attracting more/keeping current clients and visitors, costs, generating income, and upgrades to facilities. Competition was mentioned by one quarter (24%) of respondents with the majority commenting on how competition can make it tough for their business.

Table 16: Major challenges facing local business in the next five years (n=51)

Themes	Comments	%
Infrastructure	24	47
Council and government plans and regulations	18	35
Keeping business running	18	35
Competition	12	24
Promotion and awareness	10	20
Economy and NZ dollar	9	18
Other	9	18
Collaboration	6	12
Local developments	6	12
Staffing	4	8

Promotion and awareness (20%) was mentioned as a challenge both for businesses themselves but also for the region as a whole. The economy and the high NZ dollar were mentioned as a challenge to businesses (18%) generally around uncertainty issues.

Other challenges included difficulties in getting local businesses (and residents) working together towards a shared goal for the region (12%). Challenges in terms of local developments (12%) focused on growth and investment which are not always was seen as positive.

Lack of investment in quality commercial buildings in the town

The intensification of Kumeu taking away the feeling of a rural town and area

Four comments (8%) related to staffing challenges such as the lack of local employment and difficulty finding good staff.

General comments about the future of the visitor industry

Respondents were asked for any other remarks or suggestions about the future of the visitor industry; 23 provided comments. These mainly relate to the need to have a well-managed, cohesive and sustainable visitor industry that is focused on making the most of existing resources and assets of the area (including heritage and the natural environment) - providing a quality experience for visitors and residents alike.

Improved infrastructure in terms of roads, public transport, facilities for cyclists, and connectivity (internet) as well as better accommodation options and information for visitors is seen as very important.

> *Facilities for all the bike riders - stops where they can access water, toilets and a bit of shelter*

> *I have a high end clientele both from outside the district and from overseas. There are few accommodation options in the wider district and absolutely none in the close proximity for anyone to over-night or stay longer to experience the local attractions*

Respondents identified a need to create an environment that supports collaboration between businesses, upgrades service standards, and is focused on the retention of local identity and 'sense of place'.

> *All visitor attracting businesses are responsible for ensuring that we provide a quality and enticing experience. We all need to work together to lift visitor numbers and assist each other to raise our standards*

> *We must have a strategic and well thought through plan that sees appropriate activity and encourages the correct sort of investment for the communities we serve*

> *Well managed growth that retains the integrity of our beautiful spaces. New buildings should reflect the Nor West and have some charm and special characteristics about them*

Conclusions: cross cutting themes

All stakeholders enjoy the peaceful rural environment of the NWR area and the opportunity to escape the frenetic pace of the city - they also appreciate the proximity and easy access to other parts of Auckland. As a destination – and as a place to live - NWR offers visitors, residents and the majority of business respondents who also live in the area, a beautiful natural environment where they can spend time with friends and family with plenty of opportunities to participate in outdoor recreational activities.

There are both similarities and differences in visitor and resident participation in recreational activities. Both groups enjoy the outdoor spaces and recreational activities on offer. Residents make the most of the numerous recreational opportunities at their door step with over 90% participation rates in all four broad categories (outdoor activities, food and beverage, events and 'other' activities). While 86% of visitors surveyed participate in outdoor activities, only 54% partake in the area's food and beverage offerings, or attend events (49%). Visitors participate even less (28%) in 'other' activities for example, visiting heritage attractions, museums and galleries, shopping, visiting parks and gardens, and bird watching. In terms of outdoor recreational activities, visitors participate more in cycling and mountain biking, but residents are more likely to go to the beach for swim, go tramping or walking, or visit a park or garden.

When business respondents were asked to highlight places that would be of interest for visitors; Muriwai beach and the gannets and Woodhill as well as visits to wineries and vineyards, cafes, pubs, and restaurants were at the top of the list. Business respondents' top suggestions on ways to enhance the NWR visitor experience include the development of trails, walkways, and better accommodation options along with better quality restaurants and cafes, longer opening hours and promotion of local produce. Business respondents also highlight a need to upgrade service standards in food and beverage options in NWR.

Residents (91% as opposed to 28% for visitors) have significantly higher levels of participation in 'other' activities such as heritage, arts, and cultural activities and have a higher level of interest in potential cultural tourism offerings from Ngāti Whātua o Kaipara than visitors. Only 17% of visitors surveyed indicate they are interested, or 'extremely' interested in such an experience however the majority of Business respondents agreed that a visitor experience/tourism offering based on the culture and heritage of Ngāti Whātua o Kaipara would be of benefit to NWR's economy.

All respondents would like to have access to more information about a broader range of things to do in the NWR area - more also needs to be done to attract domestic and international visitors to the area.

Visitors bring economic impacts to the region; every 10,000 visitors generate approximately $240,000 per day of spend or 'new money' coming into the area. Residents generally support tourism and consider visitors to be good for the local economy in terms of revenue generation, business opportunities and job creation. Businesses feel there is a need to attract more day visitors (especially Aucklanders) as well as domestic visitors and generally agree that 'more tourism' would be good.

Respondents to all three surveys are also critically aware of the need to manage the development of the visitor industry in a sustainable manner. All groups expressed concern about roading, traffic congestion, and lack of infrastructure. Residents were particularly concerned about the increased urbanisation of the NWR area and were wary of increased visitor numbers and an increase in the local resident population that would put pressure on existing resources. They were also concerned about the impact of new developments to accommodate new arrivals to the area in terms of residents' unique lifestyles and local identities. All noted a need to be mindful of the impact of visitors on the natural environment and the distinctive characteristics and sense of place of the local areas in NWR.

There are significant opportunities for the businesses and communities of the North West Rodney area to optimise the benefits that closer engagement with the visitor industry can bring. There is an opportunity to develop local approaches to maximise visitor yield and interaction with an emphasis on business networking and community engagement with the visitor industry as well as the development of a stronger 'sense of place' for each of the diverse communities of North West Rodney.