Ōrākei Visitor Strategy 2013-2016: Visitor Strategy Research - Phase 2

Prepared for

Ōrākei Local Board

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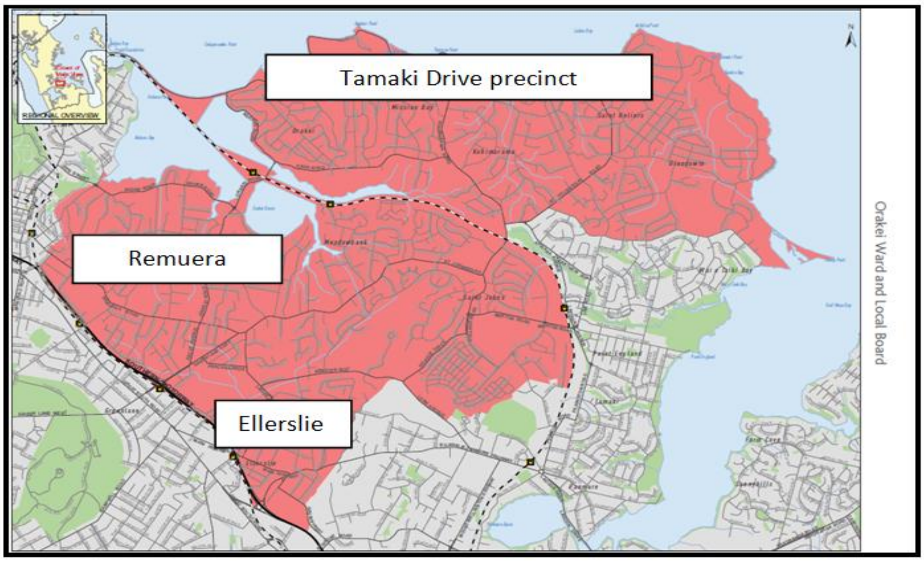
Introduction

In November 2012, the Ōrākei Local Board (with support from ATEED) commissioned NZTRI to conduct research to inform the development of a three-year Visitor Strategy for the Orākei Ward. The focus of the research is on encouraging the use of local resources in a way that enhances economic opportunities and improves business and community well-being in a sustainable manner.

The geographic area covered by this research includes three local areas: i) Tamaki Drive precinct (from Okahu Bay, Mission Bay, Kohimarama through to St Heliers), ii) Remuera and 3) Ellerslie (Figure 1).

Figure 1: The Ōrākei Ward - research area (3 locations)



The Visitor Strategy research program involves two phases:

Phase 1: The development of a tourism reference group (Visitor Strategy Group); a local tourism audit (online and on-site) and a 'snapshot' Visitor Survey.

Phase 2: A continuation of the Visitor Survey through to 30 April 2013, and a Business Survey.

Phase One research was completed in February 2013 –a copy of the Phase One report is available from Orakei Local Board and will be uploaded to www.nztri.org at a later date. The research highlighted an opportunity to encourage visitors to stay longer, and spend more time (and money) in each local area by offering a broader range of 'things to do' that include, but are not limited to, eating, drinking and shopping; as well as a better 'sense of place' for each area. NZTRI's Phase 1 report concludes that the best way to achieve an immediate impact is through the improved performance of stakeholders and partners through networking and collaboration. Phase 2 research builds on this previous work and is also designed to use research activities (e.g. data collection) as a way to stimulate local networks, encourage business linkages and build stronger community engagement with the visitor industry.

This report commences with a review of the research approach and then provides the results of visitor surveys in Tamaki Drive, Remuera, and Ellerslie and a business survey covering the three local areas. The information presented in the report enables key stakeholders in the area to better understand their visitors, and to gain insights into what benefits they bring to the local area. In addition, the research is designed to support local decision-making and strengthen the visitor economy.

The report concludes with reflections on the research to-date and recommendations to support the next phase of this research agenda – the development of the *Orākei Visitor Strategy 2013-2016.*

Method and Approach

Visitor Survey:

The results presented in this report, combine data collected during Phase 1 and Phase 2 of the Visitor Survey. The total number of completed visitor surveys is 418 with data collected between December 2012 and April 2013 (see Table 1). Data collection commenced (Phase 1) with an initial 'snapshot' intercept (face to face) survey conducted during December 2012 and January 2013, with visitors to the three local areas. This was augmented with an online version of the Visitor Survey (Phase 2) that ran through to 30 April 2013.

In cooperation with the Orākei Local Board, the Orākei Visitor Strategy Group (VSG), and their networks, local businesses collected email addresses of visitors to the area and passed these to NZTRI who then sent out an email with the survey link to the visitors. Additional promotion of the survey was achieved through, for example, the use of social media, newsletters, articles in the East & Bays courier, email sent to customer databases, and links on business association websites.

Table 1: Breakdown of survey responses (n=418) Phase 1 and Phase 2

	Tamaki Drive	Ellerslie	Remuera
Phase 1	104	64	65
Phase 2	**97**	**64**	**24**
Total	201	128	89

Business Survey

The Business Survey was conducted online between 21 March and 30 April 2013, and resulted in 42 responses. Members of the VSG were requested to i) complete the survey themselves and ii) pass on an email invitation to participate to those in their networks. NZTRI also worked with Orakei Local Board to send an email invitation to participate in the Surveys to various tourism and business related databases. Business Associations in the three local areas contacted their members directly (many made a personal one-to-one visit), via email sent to databases, through newsletters, and links on websites. Despite these efforts, the lack of engagement with the Business Survey is disappointing. *Table 2* shows the number of survey responses collected in each local area.

Table 2: Data collection – Business survey (n=42)

	Tamaki Drive	Ellerslie	Remuera
	6	26	10
% of total	14%	62%	24%

Results are presented with a caveat that with the small sample size caution must be applied when interpreting these findings – in other words, results of the Business survey are given as a guide to show the 'type' of information that the survey could offer.

The research presented in this report provides a baseline against which later research can be measured. The survey tools worked well and can be easily adjusted to meet evolving information needs.

Visitor Surveys – findings

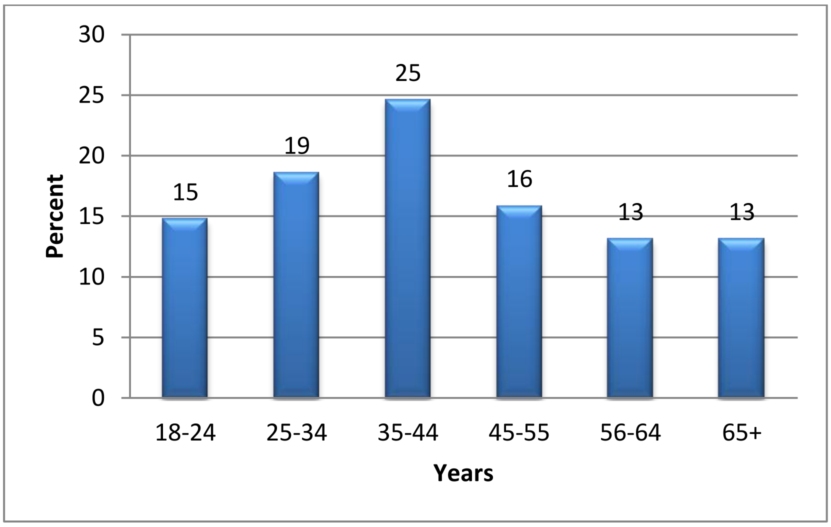
The following findings combine the data sets from both Phase 1 and Phase 2 of the research.

Tamaki Drive

Visitor demographics

Sixty-eight percent of those surveyed are women. Nearly 60% of the respondents are under 35 years of age (Figure 1). There is good representation from the 45 to 64 age group (29%).

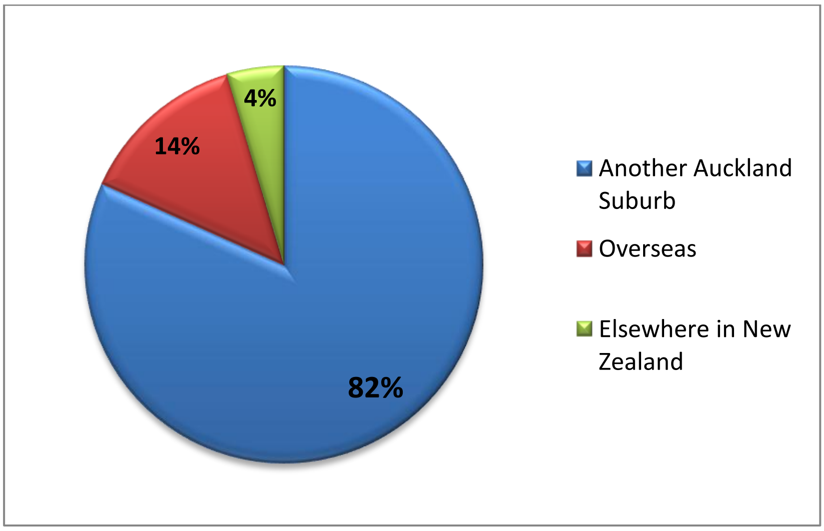
Figure 1: Age breakdown (n=183)



Over 80% of the visitors surveyed are from other parts of Auckland (Figure 2). Of the 109 Aucklanders who provided further details, 47% were from Central suburbs, 17% from the West, 17% from East Auckland with the remaining 17% coming from the city's North and South. There is only a small representation of domestic New Zealand visitors (4%) from outside of Auckland.

Overseas visitors (n=24) made up further 14% of those surveyed with the top four countries of origin the UK (24%), Australia (12%), Hong Kong (12%) and China (12%).

Figure 2: Where visitors come from (n=175)

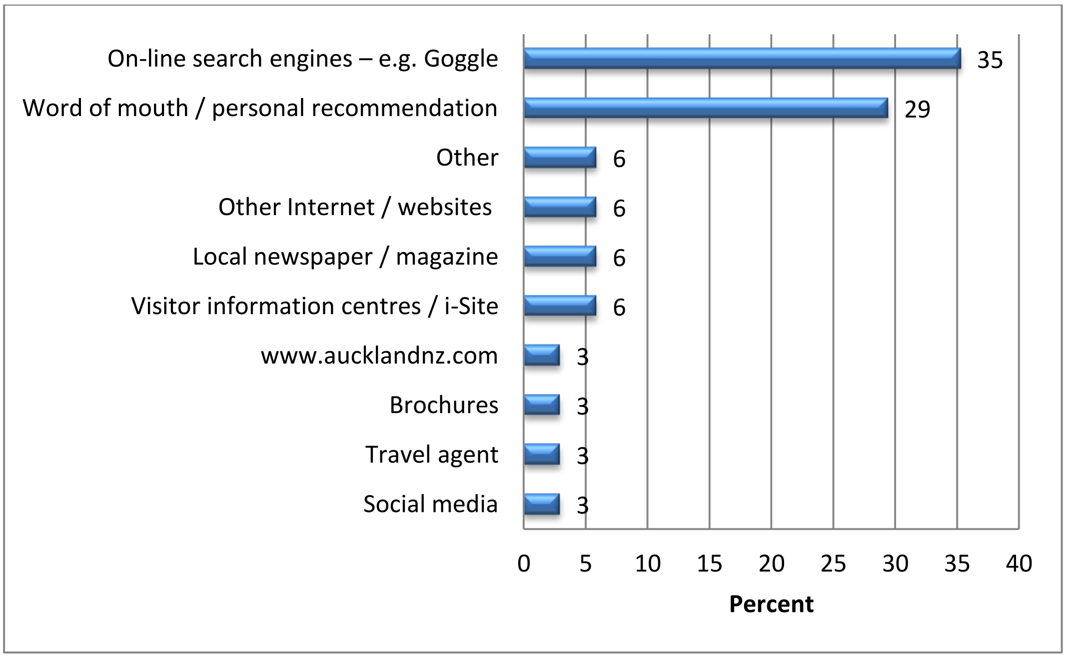


Information sources

Only 19% of visitors to Tamaki Drive looked for information about the area before their trip. Of these visitors (n=29), over half (52%) stated it was very easy to find information about Tamaki Drive, with a further 35% describing it as being 'easy' to locate. Only 3% stated it was difficult to find information.

The two main sources for information on Tamaki Drive are online search engines (35%) and word of mouth recommendations (29%)(Figure 3). Other sources include local newspapers/ magazines (6%), visitor information centres (6%) and the other internet sites/websites (6%).

Figure 3: Main source of information used to find out about Tamaki Drive (n=34)



The majority of the visitors surveyed (85%) did not look for information before their visit because they were already familiar with the area. As one visitor commented "I've been coming to Tamaki Drive since I was a kid".

Other visitors (n=11) said that they didn't look for information prior to their visit because their family/ friends with whom they are spending time, knew the area well.

Visitors were asked if there was anything about Tamaki Drive that they would like more information on. Nearly 40% of the 78 visitors who made a comment were happy with the current information available. Comments included:

> "Facebook is good for dates, events and new shops".

> "There is plenty of information on the Internet".

Areas where visitors did seek more information included public facilities/maps (n=15), and more about attractions and activities (n=10) such as events, fishing, and boating.

> “I want to know more about the parks and playgrounds in the area especially for my children. Maps showing the parks in the area would be helpful.”

> “I didn't find much information on what activities I can do here. I love the sea and the beach area here and I would be happy to get more information on fishing and boating activities.”

A few visitors also wanted more information on the natural environment including the flora and fauna (n=3), and also about the heritage, cultural and historical significance of the area (n=4). Visitors said:

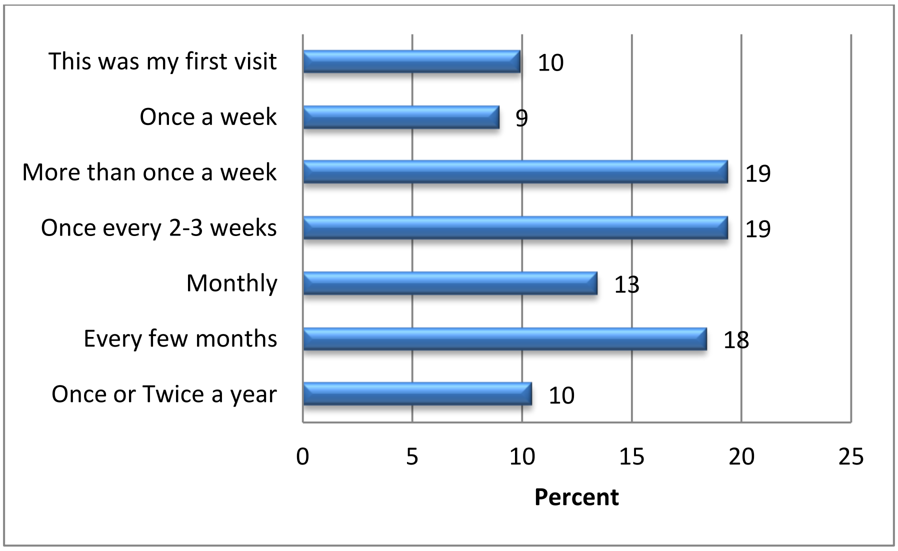
> “I see many lovely trees and birds in the area and I want to know their names. Simple information plaques identifying these trees and birds in the park are a good idea.”

> “This place must have some cultural significance but I can't really find information on it.”

Trip characteristics

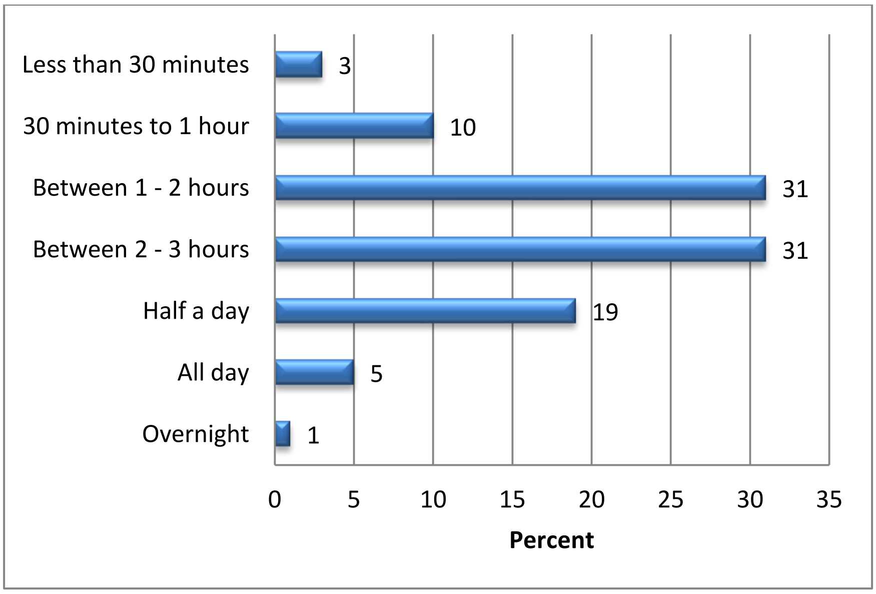
Tamaki Drive, as a destination attracts many regular visitors with over a quarter (28%) of those surveyed coming at least once a week (Figure 4). Apart from the regulars, the survey data also captured first time visitors (10%) as well as those who only come to Tamaki Drive once or twice a year (10%).

Figure 4: Visitation patterns (n=199)



Visitors spend quite some time in Tamaki Drive, with over 60% staying between one and three hours (Figure 5). Nearly a quarter (24%) of visitors stayed for half a day or more in the area. Only 13% of the visitors spent an hour or less in Tamaki Drive.

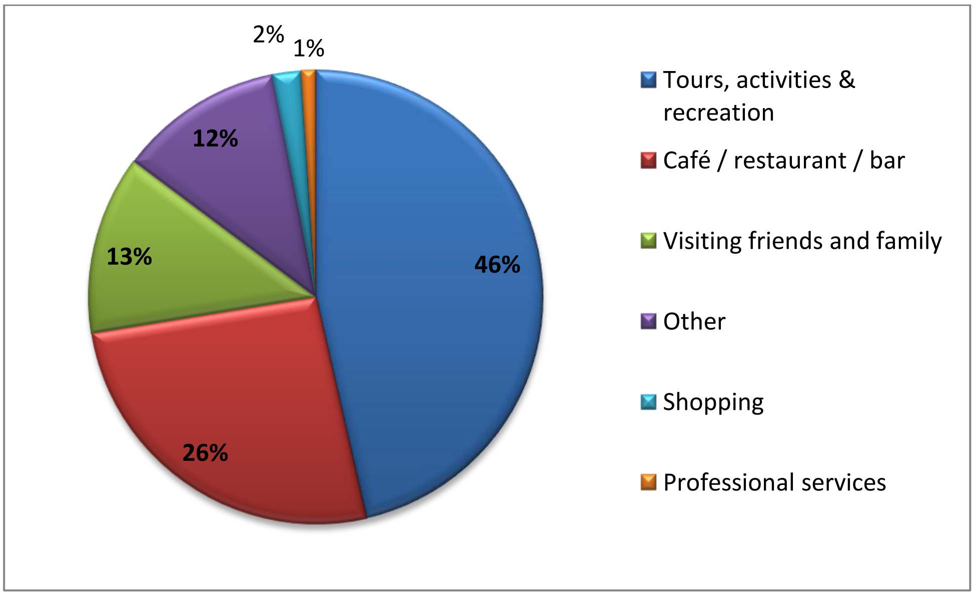
Figure 5: Length of visit (n=200)



Tours, recreational activities and sightseeing opportunities are the main reasons why nearly half (46%) to the visitors come to Tamaki Drive (Figure 6). Tamaki Drive's cafés / restaurants and bars are the main draw card for just over a quarter (26%) of the visitors. Visiting family and friends in the area is also mentioned by some respondents as being a major reason for coming to the area (13%).

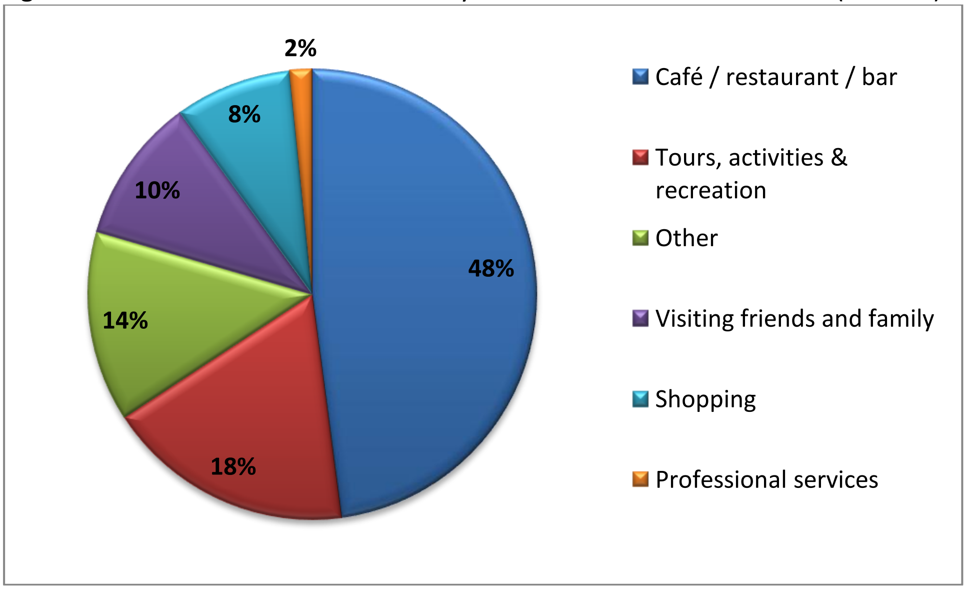
Of the 93 visitors who added further details about the main reasons why they had come to Tamaki Drive, a third of these visitors (n=31) expressly stated that they came for the beach. Around another 17% of the visitors (n= 16) commented that they came to Tamaki Drive to engage in recreational activities such exercising, walking or cycling along the beach. Visitors also came to Tamaki Drive as part of a family outing (n=13) which included a visit Kelly Tarlton's or taking their children to the playground, park or beach.

Figure 6 : The main reason for your visit to Tamaki Drive (n=196)



Many visitors take the opportunity to combine their main activity of coming to Tamaki Drive for recreational purposes with going to the local cafés, restaurants or bars (48%)(Figure 7). Other reasons include recreational activities like taking a tour (18%), visiting family and friends (14%) or shopping (8%) in the local area.

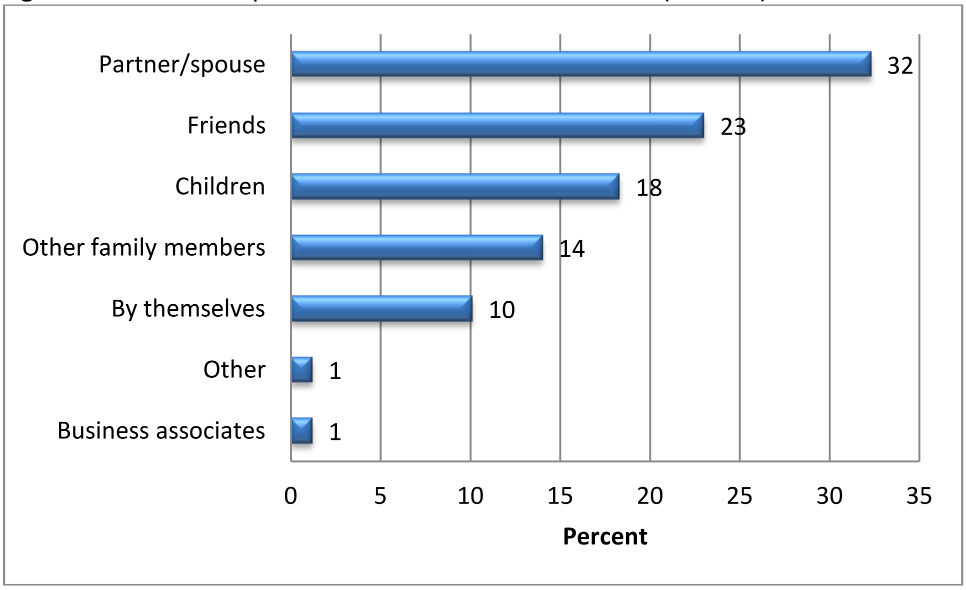
Figure 7: Other activities undertaken by visitors when in Tamaki Drive (n=190*)



**Visitors were able to select more than one option*

Over half (55%) of visitors to Tamaki Drive were accompanied by their partner/spouse and/or children (Figure 8). Nearly a quarter (23%) of the visitors came with their friends, with a further 14% accompanied by other family members.

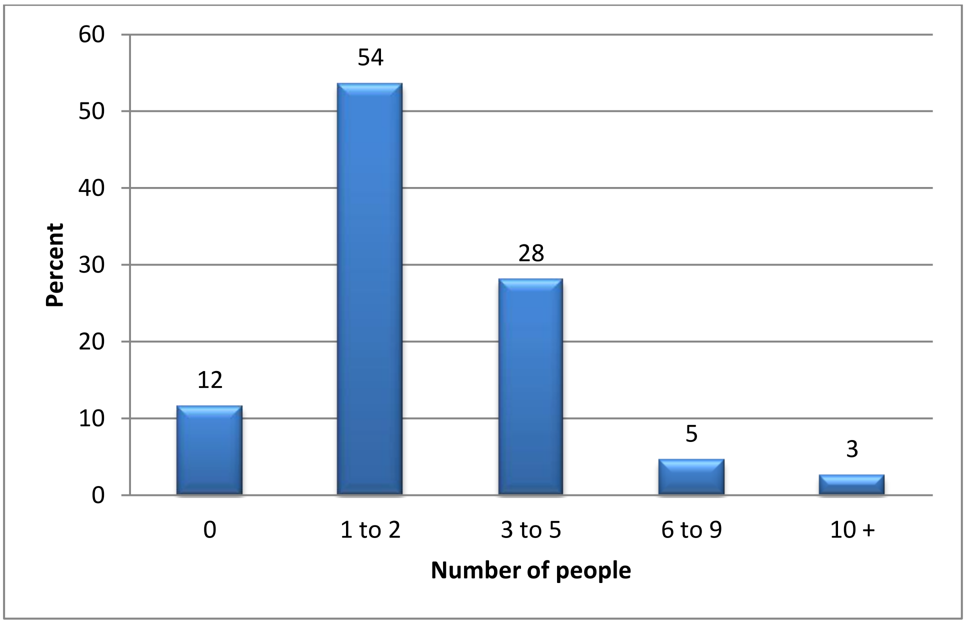
Figure 8: Who accompanied the visitor to Tamaki Drive (n=237*)



**Visitors were able to select more than one option*

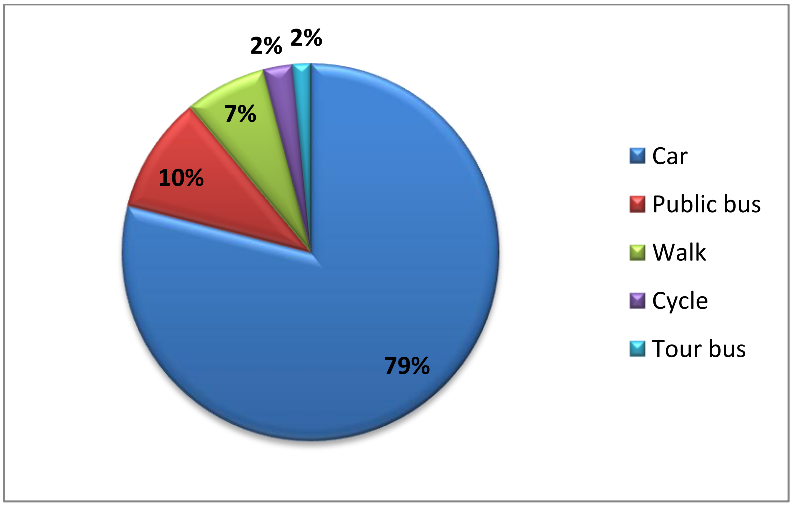
In terms of actual group size, over a half (54%) of the visitors came with one to two people, with a further 28% being accompanied by between 3 to 5 people (Figure 9). Fewer than 10% of visitors were accompanied to Tamaki Drive by 6 or more people.

Figure 9: Number of people accompanying the visitor to Tamaki Drive (n=200)



Nearly 80% of visitors came to Tamaki Drive by car with only 10% using public transport (bus) to get there (Figure 10). Other transport options included walking (7%) or cycling (2%) to Tamaki Drive.

Figure 10: Main mode of transport used get to Tamaki Drive and back (n=200)



Nearly all of the visitors (98%) stated that Tamaki Drive was easy to find as a location, including the overseas visitors. Of the 41 visitors who added a comment, nearly half (46%) mentioned it is generally easy to get to Tamaki Drive as they “know the area”, “grew up here” or “have been here before”.

A few visitors (n=4) visitors commented that it is generally easy to get to Tamaki Drive although at times they encounter problems due to busy traffic. One visitor highlighted that "you have to know two or three roads to avoid traffic sometimes".

Other visitors (n=5) said that the ease of getting to Tamaki Drive depended on where you were coming from, as driving from the city is easier than if one was coming from another place in Auckland.

Over three quarters (76%) of visitors (n=199) felt that there was adequate signage to provide information on things for them to do and see along Tamaki Drive with one commenting that "Brown signs to attractions are good".

For the 24% of visitors (n=48) who felt more signage was required almost 40% of these visitors (n=19) wanted more signage around Tamaki Drive’s activities and attractions along with directions. Comments included:

> "There could be more signs for tourists about the activities available: biking, etc.".
>
> “Apart from road signs, I did not see any other signs.”
>
> “The area needs more signs especially for parks and playgrounds.”

"Provide signs in different languages."

Some of these visitors (n=8) commented that they did not bother looking for signs because they were familiar with the area.

Expenditure

The vast majority (85%) of visitors (n=193) surveyed spent money at local businesses during their time in Tamaki Drive.

The average visitor surveyed spends $21.22 during their time in Tamaki Drive (Table 3). Most of the visitor spend is on food and drinks ($14.76), and on tours, activities and recreation ($2.08). These per person expenditure figures are based on a total of 422 people including 304 adults and 118 children.

Table 3: Visitor expenditure per sector (per visit)

Expenditure item	% spend in sector - all respondents *(n=422)	Spend per person (NZ$) - all respondents *(n=422)
Food / drink (café/ restaurant/ bar / takeaway food)	69.55	14.76
Tours, activities & recreation	9.78	2.08
Professional services	6.64	1.41
Retail shopping	5.14	1.09
Food shopping (supermarket etc)	4.44	0.94
Other	2.40	0.51
Events	1.45	0.31
Local transport	0.60	0.13
Total	**100.01**	**$21.22**

Visitor satisfaction

Visitors were asked whether they agreed with a number of statements relating to their recent trip to Tamaki Drive (scale of 1 – strongly Disagree to 5 - strongly Agree) (Figure 11). The mean responses for all elements ranged from 3.48 to 4.60 out of 5.

Visitors' strongly agree that Tamaki Drive has beautiful natural attractions (4.60 out of 5) and offers a good variety of cafés, bars and restaurants (4.54) (Figure 11). Visitors also strongly agree that the area is well serviced by public transport (4.46) and is a safe place to shop (4.45). Visitors also feel that Tamaki Drive offers good local walkways, cycle paths, track and trails (4.40) and good public facilities (4.17).

On the other end of the scale visitors feel that the variety of retail shopping on offer along Tamaki Drive could be better (3.51), and that the availability of good parking in the area (3.48 out of 5) is an issue. Visitor response to the statement that Tamaki Drive offers interesting heritage, historical and visitor attractions (3.60), cultural attractions (3.71) and good value for money (3.72) indicates there is also room for improvement in these areas.

Figure 11: Visitor satisfaction ratings (mean)

Of the 42 visitors who added comments about their Tamaki Drive experience, certain themes emerged, including: the need for improved public facilities including more visitor parking and toilets (n=8); that the area is an “expensive place to visit”, especially the prices at bars and restaurants (n=5); and a need for more food outlets and retail (n=6). Positive comments included that it had a great atmosphere (n=8) with other visitors happy with the existing facilities and activities (n=4).

When visitors were asked what they found most attractive or appealing about Tamaki Drive as a destination, over half (53%) of the 250 comments provided were again about the natural surroundings: beaches, “parks are very beautiful”, and “sand, seawater and air”.

Positive comments included that Tamaki Drive had a good atmosphere and was a “clean environment” and a safe place (n=30). Visitors also commented on the good public facilities (n=21) such as the “park and playing facilities for children”, “accessibility to the beach” and open public areas.

Kelly Tarlton's is very much part of Tamaki Drive and is regarded as an attractive feature (n=6). Visitor's comments also included the good cycle paths and walkways (n=19) in the area as reflected below:

> "The area is flat and great for bike riding."

> "Very good area for board walk…wonderful beach front for walking."

> "I like the boardwalk, and catering for joggers, bikers, etc."

The local eateries and bars are also a major draw card for the area (n=25) for visitors and one of Tamaki Drive's most attract features.

When visitors were asked what they found least attractive or appealing about Tamaki Drive as a destination, over a third (36%) of the 152 comments made were about the "traffic chaos" and parking problems. Other comments focused on the overcrowding (n=14) and the strain that put on public facilities (n=7)

> "Rubbish lying around the place due to a lack of rubbish bins."

> "Lack of seats and parking for disableds"

Other 'least attractive' features of Tamaki Drive mentioned four or fewer times include: the quality and service of the restaurants and the high prices, safety concerns e.g. the narrow cycle paths often shared with pedestrians and the lack of activities including water sports.

Return visit and visitor recommendations

The overwhelming majority (96%) of visitors surveyed would visit Tamaki Drive again and recommend it to others (99%) as a place to come.

Nearly 144 visitors added a comment as to why they would be returning to Tamaki Drive. Most responses (n=51) were about Tamaki Drive's major draw card – the stunning natural environment including the beach, scenery and parks which would certainly bring them back to Tamaki Drive.

Many visitors (n=35) highlighted that the great atmosphere especially for spending the day with family and friends in the many public recreational spaces, and the closeness to the city was certainly attractive enough to bring them back to Tamaki Drive. Visitors commented:

> "A world class waterfront".

> "It's a great place to make special memories with family."

> "It's beautiful to be able to visit here. Coffee shop, playgrounds and the sea- it's fantastic."

"The complete package of a friendly atmosphere and a neat fun place to hang out".

Again the local eateries and bars are big attractors for return visits (n=47) along with the convenience of the area (n=22) in terms of closeness to their home.

Other reasons for people to return include the ability to spend quality time with friends and family (n=20) and enjoy walking or cycling (n=16), visit Kelly Tarlton's or participate in water-sports related activities (n=9) and retail shopping (n=2).

The only visitors (n=3) who said they would not return to Tamaki Drive were international visitors and they were not sure if they would return to Auckland in the near future.

Just over 140 of the visitors added a comment as to why they are willing to recommend Tamaki Drive to others. The majority of the 210 comments made about Tamaki Drive focused on wanting to share their experience of the great atmosphere created by the combination of the beaches, parks (n=93) and local eateries and bars (29).

A number of visitors pointed out that they would recommend Tamaki Drive as a place to visit either due to its happy atmosphere and friendly people (n=33) and because the area has good playing facilities for children (n=14). Comments included:

"I feel relaxed and happy when I come here because there are lots of happy people around the place."

"Seeing the children playing in the park with their parents is a very happy sight."

Kelly Tarlton's is viewed as a good family attraction with some visitors (n=8) commenting that it is a major reason to recommend Tamaki Drive, as one visitor commented "kids love Kelly Tarlton's".

Some visitors would recommend Tamaki Drive to others as a place for recreational activities such as walking or cycling (n=9) and this goes hand in hand with the benefit of being relatively close to downtown (n=9). Comments included:

"This is the best place to go for a walk or even cycle around. The nice sea breeze and fresh air is so relaxing."

"Even if you are busy and don't have time to walk then just driving past this area is soothing….the fresh air and beautiful scenery."

"This place is so convenient for everyone travelling from the city because it's so close."

Three visitors said they would not recommend Tamaki Drive as there is nothing interesting to do in the area.

Suggested Improvements

Of the 122 visitors who made suggestions to improve Tamaki Drive as a visitor destination, nearly half of the comments (n=66) related to the volume of traffic going through the area, parking issues, improving public facilities and making the area more pedestrian and bike friendly. Safety was a common theme:

> "Limit the amount of traffic or widen the cycle paths. It gets very busy on the road especially in summer."

> "This place needs more parking spaces as it's so difficult to find parking at times."

> "Maybe the speed limit could be dropped a little to make it a little safer for pedestrians and drivers alike..."

> "My wife and I are retired and we come during the week to relax but we never come in the weekends because we are scared that we will get bumped by cyclists as the place gets very crowded."

Visitors also made comments about the need for more information to be provided about the area (n=9), better public transport options (n=7), more activities and events (n=5), and more shops and food outlets (n=8). Among the visitors' suggestions:

> "There should be a guide at the beach providing information to people about activities in the area."

> "Perhaps a greater variety of cultural attractions... art galleries, open spaces for musicians/buskers, some historical information as one walks along".

> "A lot of people come here and there is a need for more food places serving food that is reasonably priced."

Other visitors made comments (n=28) about how they liked the area as it is and wish to keep it that way, with one visitor stating "I love Tamaki Drive the way it is. Please don't change anything about it."

Of the 32 visitors that added a final comment about Tamaki Drive, nearly half (n=15) reinforced how popular the area is, and what a lovely and pleasant place it is to visit. The remaining comments were mainly about better public facilities such as seats, rubbish bins and parking areas including accessible parking options and maintaining the beach (cleaning it up and bringing in more sand).

Key themes

Tamaki Drive’s greatest asset is clearly its natural surroundings and stunning vistas which visitors from Auckland and elsewhere appreciate. Tamaki Drive’s popularity is due, in part, to its close proximity to the city, as well as the large recreational spaces (including parks and beaches) freely available to all.

One of the key issues highlighted in this research is the apparent disconnect between Tamaki Drive’s shops/retail area, and the nearby natural attractions. Visitors often come to Tamaki Drive already fully equipped for their day, and in many cases are self-catering, so the opportunity for local businesses to engage with these visitors is somewhat limited. It would appear the large volumes of people coming through the area do not necessarily translate into higher yield for these local businesses. Visitor spend figures tend to support this with only a minimal amount being spent in the shopping areas. While visitors all agreed that Tamaki Drive has beautiful attractions, they do not generally consider that there is a good variety of retail shops.

Visitors do not feel that there is a particularly wide range of interesting cultural and heritage visitor attractions on offer. There is, therefore, a need to focus on developing other experiences for visitors besides those that take place on the beach, and in the pubs, restaurants and cafés.

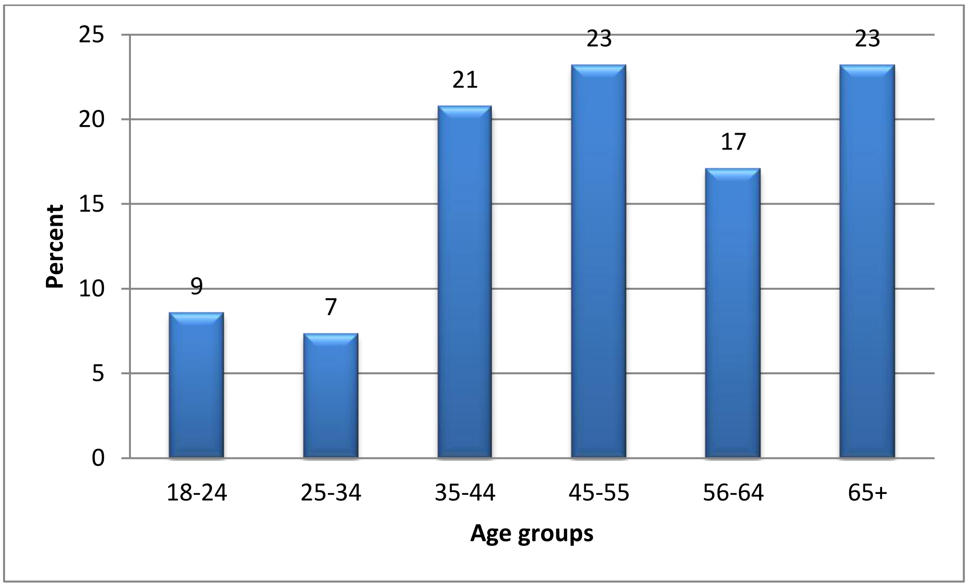
One of the drawbacks of Tamaki Drive for visitors is the perceived ‘busy-ness’ caused by the constant flow of traffic. Greater promotion of the use of public transport to visitors may help to address both the traffic issue and associated parking problems. One area of concern raised by several visitors was the safety issue of having cyclists and pedestrians on the same shared path. In order to encourage more visitors to walk or cycle along Tamaki Drive, they need to feel safe.

Remuera

Visitor demographics

Female visitors account for nearly three quarters (72%) of the sample (n=82). There is a good representation of visitors aged between 35 to 55 years (44%) in the survey sample along with those in the over 55 age groups (40%) (Figure 12).

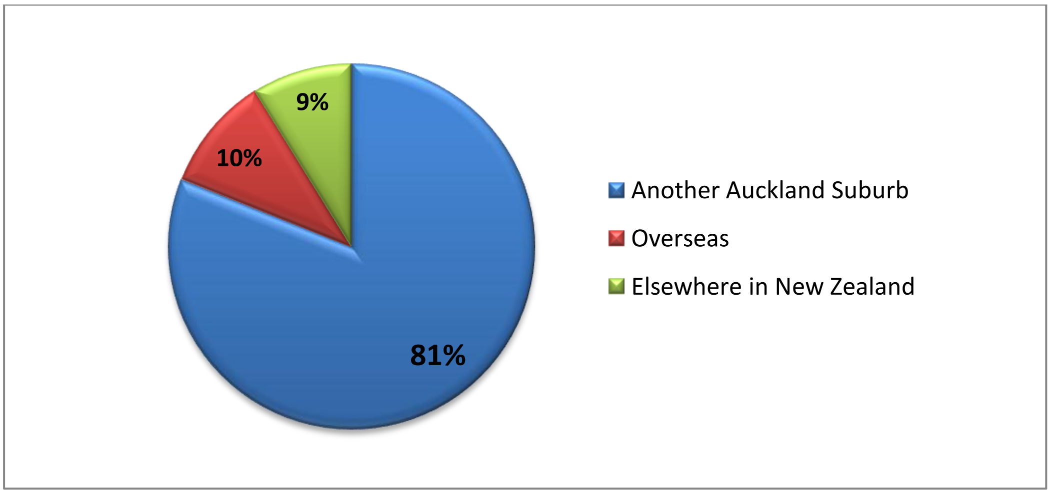
Figure 12: Age breakdown (n=82)



Just over 80% of visitors are from other parts of Auckland (Figure 13). Of the 49 visitors from Auckland who provided further details, over half were from Central areas, 22% were from the East of the city, with the remaining 26% spread across West, North, and Southern suburbs. The survey sample also included domestic visitors (9%) from outside of Auckland.

Overseas visitors (n=8) made up a further 10% of those surveyed with representation from the UK, Australia, USA and China.

Figure 13: Where visitors come from (n=79)



Information sources

Only 11% of the visitors to Remuera looked for information about the area before their trip. The main source of information about Remuera for these 10 visitors was word of mouth recommendations (70%). Of these visitors, half stated it was 'very easy' to find information about Remuera, with a further 20% describing it as being 'easy' to locate.

Over half of the visitors who said they did not look for information prior to their visit already knew the area well and had visited Remuera previously (n=55), or lived nearby (n=11). The remainder of these visitors stated that their friends and family that they were visiting knew the area very well (n=10) or that they were just passing through the area (n=2).

Of the 37 visitors who responded to a question asking if there was anything about Remuera that they would like more information on, over 50% stated 'no thank you' (n=21). Of the remaining visitors (n=27), requests for more information included on public transport, parking facilities, i-Sites locations, and maps showing tourist attractions and historical spots especially in the Remuera basin to help them explore the area. Visitors' comments included:

> "Better parking facilities because the car parks are more than often full."

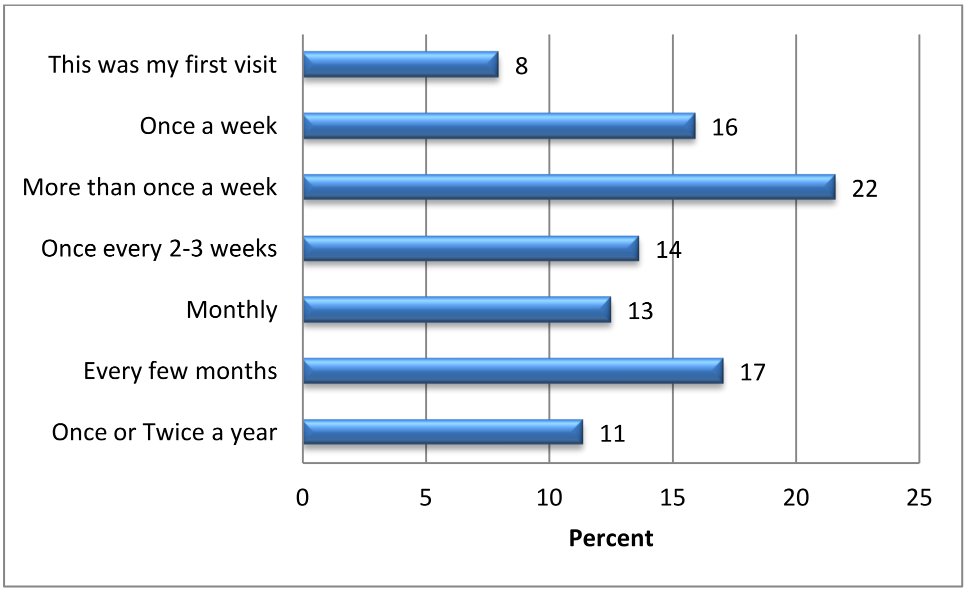
> "Parks, attraction points, maps to get around."

Trip characteristics

Over a third (38%) of the visitors are regulars, coming to Remuera at least once a week (

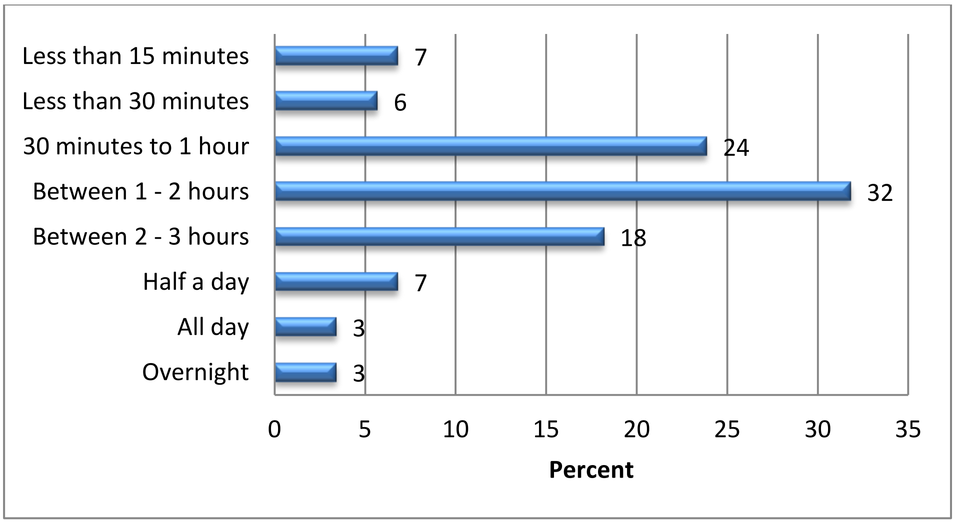
Figure 14). A further 30% of those surveyed visit the area monthly or every few months. The survey sample also included first time visitors to Remuera (8%).

Figure 14: Visitation patterns (n=88)



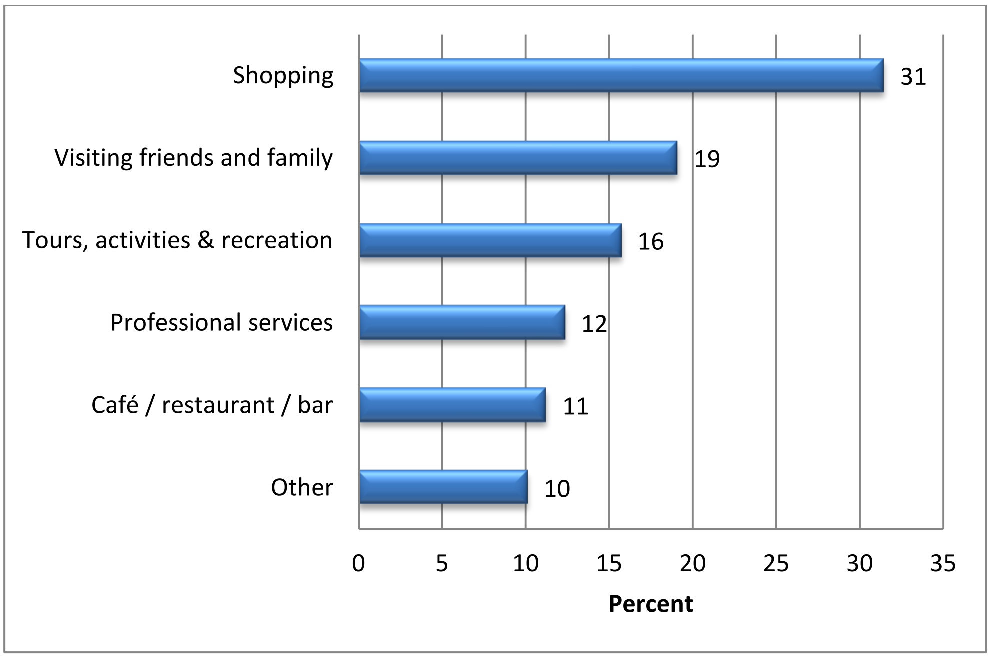
Visitors to Remuera allow plenty of time to explore the area with 50% of those surveyed spending between 1 to 3 hours in the area, with a further 10% spending half a day or all day (Figure 15). Just under a quarter (24%) of visitors spent between 30 minutes to hour in Remuera.

Figure 15: Length of visit (n=88)



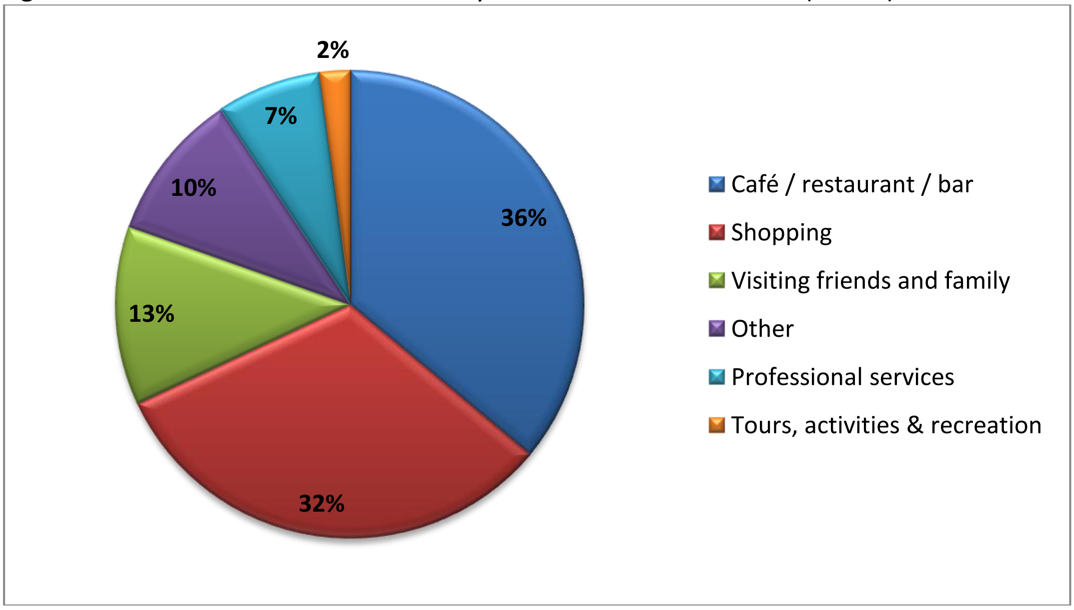
Retail shopping is the main reason why over 30% of visitors came to Remuera (Figure 16). Visitors also came to Remuera primarily to visit family and friends (19%), for tours, activities and recreation (16%), as well as for professional services (12%). The Little Rangitoto Reserve Park on Upland Road was mentioned as being a popular spot for children. Frequenting the local eateries and bars (11%) is another draw card for visitors to come to Remuera.

Figure 16: Main reason for visiting Remuera (n=89)



Many visitors combine their main activity of shopping and/or visiting friends and family with going to local cafés or restaurants (36%) (Figure 17). Others visitors took the opportunity to also shop (32%) and/or use professional services (7%) whilst in the area. The 'other' category included visits to the local library and post office.

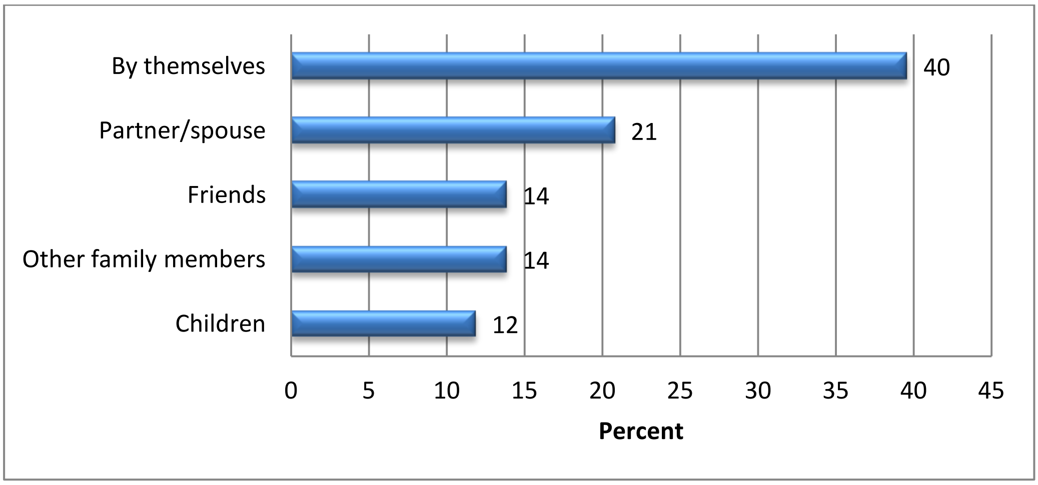
Figure 17: Other activities undertaken by visitors when in Remuera (n=97*)



**Visitors could select more than one option*

Forty per cent of visitors to Remuera were on their own, with a further 21% accompanied by their partner/spouse (Figure 18). Just over a quarter (26%) of visitors came to Remuera with their children or other family members.

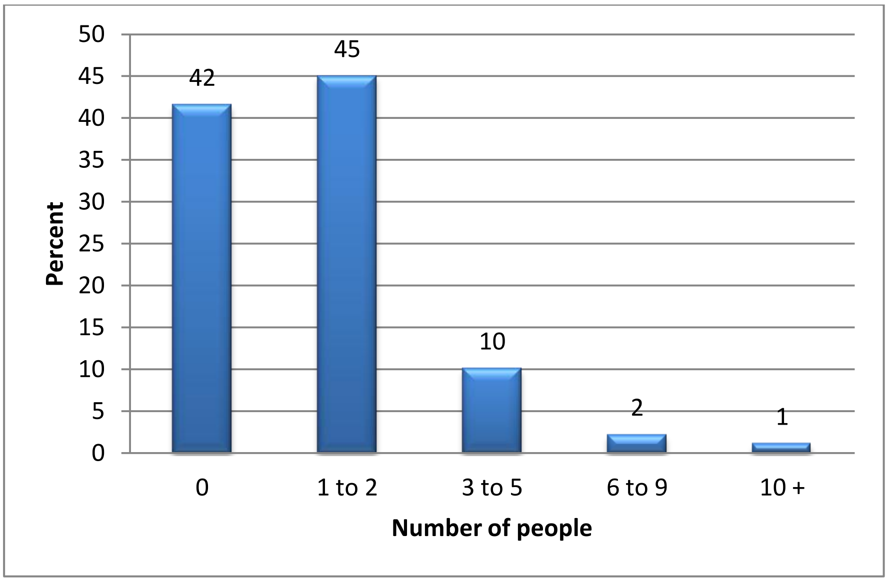
Figure 18: Who accompanied the visitor to Remuera (n=101*)



Visitors could select more than one option

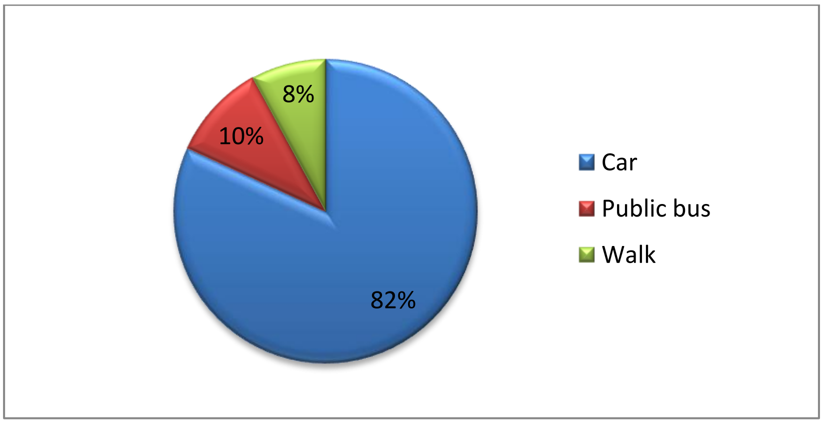
In terms of actual group size, 45% of the visitors to Remuera came with one or two people and 42% came on their own (Figure 19). A further 10% of visitors were accompanied by 3 to 5 people, with only a small percentage coming with 6 or more people (3%).

Figure 19: Number people accompanying the visitor to Remuera (n=89)



Over 80% of the visitors came to Remuera by car, with 10% using public transport (bus) and a further8% walking to Remuera (Figure 20).

Figure 20: Main mode of transport used get to Remuera and back (n=88)



Nearly all visitors surveyed (95%) said that Remuera was easy to find as a location. Visitors were familiar with the area and it is very central. Comments from the few visitors (n=5) who had some difficulty locating Remuera focused on lack of signage:

> "I got lost this morning because there I could not see any sign showing me the direction to Remuera."

> "There are no specific signs regarding which direction will lead you to Remuera."

Nearly three quarters (73%) of the visitors believe there is adequate signage within Remuera to inform them on things for them to do and see in the area.

Of the 18 visitors that made a comment on a lack of sufficient signage nearly 60% of the total comments were about increased signage for public facilities e.g. library, toilets, parking, and other recreational activities including signs to parks and walkways from Remuera shopping centre. Visitors also commented on more signage in specific spots in Remuera, especially around areas of interest for visitors and the shopping centre. Comments included:

> "It is actually difficult to know what activities are available apart from shopping. Maybe there are no activities and hence the lack of signs."

> "No specific signs regarding which direction will lead you where."

> "Where is the Remuera shopping centre? We don't know how to get from Market Road to Remuera."

Expenditure

The majority (84%) of visitors spent money at local businesses during their time in Remuera.

The average visitor spends $48.83 during their visit to the area**Error! Reference source not found.**4). The majority of the visitor expenditure went to retail shopping ($16.55), followed by food and drinks ($11.64) and professional services ($10.21). These expenditure figures for all respondents are based on a total of 144 people including 115 adults and 29 children (survey respondents could include others in their spend information).

Table 4: Visitor expenditure per sector (per visit)

Expenditure item	**% spend in sector - all respondents *(n=144)**	**Spend per person (NZ$) - all respondents *(n=144)**
Retail shopping	33.89	16.55
Food / drink (café/ restaurant/ bar / takeaway food)	23.83	11.64
Professional services	20.91	10.21
Food shopping (supermarket etc)	18.69	9.13
Other	1.28	0.63
Accommodation	1.22	0.60
Local transport	0.19	0.09
Total	**100.00**	**$48.83**

Visitor satisfaction

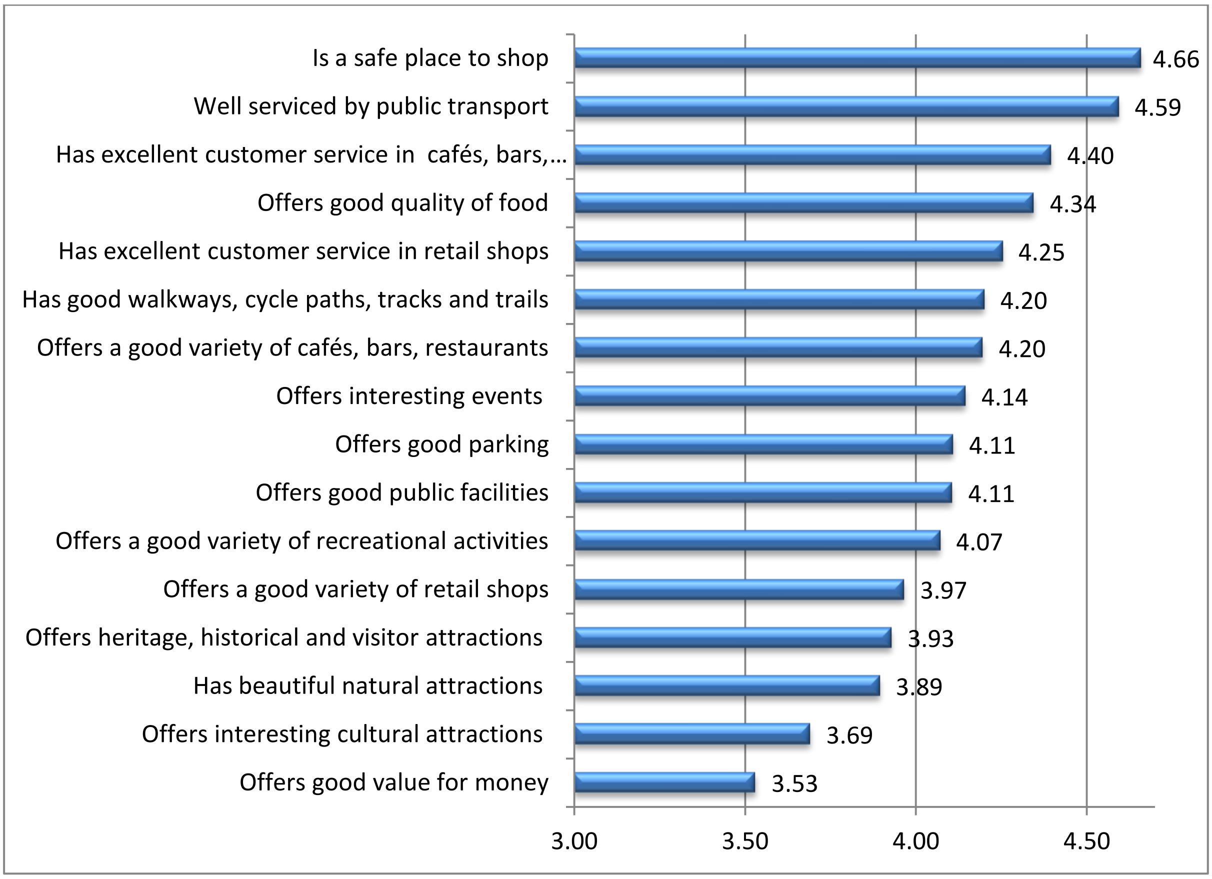
Visitors were asked whether they agreed with a number of statements regarding their recent trip to Remuera (scale of 1 – strongly Disagree to 5 - strongly Agree) (Figure 21). The mean responses for all elements ranged from 3.53 to 4.66 out of 5.

Visitors' feel strongly that Remuera is a safe shopping environment (4.66 out of 5) and that it is well serviced by public transport (4.59). Visitors also agree that the local cafés, bars and restaurants in Remuera offer an excellent standard of customer service (4.40) and good quality of food (4.34).

Whilst visitors agree that Remuera retail shops have an excellent standard of customer service (4.25), they are less positive about the variety of retail shops on offer (3.97) and that Remuera offers good value for money - the lowest of all 16 elements at 3.53 out of 5.

When compared to other areas of satisfaction, visitors rated the following aspects of their trip to Remuera at the lower end of the scale: historical and visitor attractions (3.93), beautiful natural attractions (3.89) or cultural attractions (3.69). This would indicate that there is room for improvement in these areas.

Figure 21: Visitor ratings on selected aspects of their trip to Remuera (means) (n=83-87)



Of the 16 visitors who added a comment about their feeling towards Remuera as a place to visit, three expressed how much they liked the experience.

> "The service in Remuera is really excellent at all times."

Over a third (36%) of the visitor comments (n=7) were about wanting more public facilities such as toilets, parking and pedestrian crossings. Comments included:

> "Needs a crossing from the supermarket to the bakery, vegetable shop and cafe. Dangerous to cross sometimes and makes it difficult to support the small businesses."

Other visitor's comments (15%) suggested more shops in Remuera, with more diversity.

Of the visitors (n=70) who offered their opinion on what they found most attractive or appealing about Remuera, over half (54%) of the total comments made (n=111) were about the retail shops and the quality merchandise, the local eateries, along with the atmosphere of the shopping area. As one visitor observed - the small shops and friendly shop assistants give Remuera a "village or community feeling"

Other visitor comments (n=17) talked about the natural surroundings of Remuera with all the parks, playgrounds and big trees in the area. A visitor noted:

> "I like the big trees and the playground. It's a great place to bring my children."

Visitors also made comments about the good public facilities and clean environment (14%) in Remuera, and how it added to their experience.

> "Clean streets, good parking and variety of cafes and fashion shops."

Visitors (n=10) also noted the general surrounds of Remuera as appealing including the large homes with gardens and backyards.

The least attractive feature of Remuera based on 38 visitor comments was the busy traffic along with limited and expensive parking options (n=13) as expressed below:

> "I hate the endless traffic here. Also the parking is too expensive and at times I cannot find a parking spot."

Of the 53 visitors adding a comment about the 'least attractive' feature of Remuera, 17% stated there was "nothing unattractive" about the area. For those visitors did identify some less attractive features, over half (52%) commented on parking and traffic issues, the lack of public facilities especially in the local parks. Visitor observations included:

> "There is an urgent need for more public toilets in the area."

> "This place lacks facilities at the park especially for children."

> "Limited parking options when it is very busy."

Other visitor comments emphasized how expensive it is to shop in Remuera (8%) and that it "can be intimidating" to go into certain shops. Comments were also made about the lack of variety of shops (8%) in Remuera, and that many shops were closed on the weekend.

Return visit and visitor recommendations

The overwhelming majority of visitors surveyed (99%) would revisit Remuera, while 78% would recommend it to others.

Over 80% of the visitors surveyed (n=73) added a comment about why they would revisit Remuera. Of the total comments (n=99) made by visitors 60% related to the three main attractors to the area - retail shopping including supermarkets etc, frequenting the local eateries and visiting friends and family.

Visitors also commented about returning to use the good public facilities in Remuera especially the parks and playgrounds, banks and the local library (15%). As one visitor stated:

"My kids love the playground here and so we come here often. Also because it is close to the shopping centre…very convenient for our family day out."

Over half (55%) of the visitors surveyed (n=49) added a comment as to why they would recommend Remuera to others. Nearly three quarters (63%) of the total comments (n=90) made by visitors' highlighted the great location, the quality and variety of retail shops and the friendly village atmosphere as a reason to recommend Remuera:

"We love Remuera! Lovely people and good small businesses to support with great service :) go the extra mile."

"Good range of shops especially for tourists."

"The area gives a relaxed feeling and a cute little village."

Some visitors commented on the convenience of coming to Remuera (10%) for shopping and other activities.

"Close proximity to good activities, good place for children and for meeting friends."

"The convenience of the location is the best thing about this place."

"It is small, easy to get around and away from the hassle of Newmarket, and most of the shopping areas in Auckland."

Visitors also stated that they would recommend Remuera for its family friendly environment (4%) especially with the range of parks and children's playgrounds in the area, as one visitor elaborated - "The parks are nice and safe for families especially children."

For the 18 visitors who would not be recommending Remuera to others, over a third of the total comments (n=25) focused on alternative places to visit:

"I prefer Ponsonby because it has much more character."

"Better to go to the Viaduct because it is more switched on."

Another group of comments indicated that Remuera is lacking the suitable variety of shops and activities for visitors:

"There are not many activities here and no special spots to see or visit."

"Seems tired - Newmarket has better shopping."

The remaining visitor comments (n=7) focused on "too much traffic", limited parking options, and that the place is mainly for locals and that is too expensive for visitors:

> “Everything here is expensive. It’s really too expensive for visitors. Maybe it’s okay for the rich locals that live here.”

Suggested Improvements

Nearly 60% of the visitors surveyed (n=51) put forward suggestions on how to improve Remuera as a visitor destination. Nearly a third of all visitor comments referred to a need for more public facilities especially toilets in the parks, better traffic management and extra parking.

Other visitor comments were about improving the overall atmosphere (12%) in Remuera by boosting the character and vibrancy of the area:

> “Add more culture, vibrancy and diversity to the place.”

> “This place needs more character and flower gardens.”

Visitors also put forward suggestions about more events, festivals and farmers’ markets in the area (12%), and for more signage, maps and information on available activities for visitors (8%).

> “Why not put a sign on Market Road saying "Welcome to Remuera."

Visitors also suggested (10%) more food outlets and retail options, but not all ‘high-end’ shops (8%) as they already considered that area is considered an expensive place to visit.

A few visitors (n=7) mentioned that they preferred Remuera to remain just the way it is.

Sixteen visitors out of the 89 surveyed added a final comment about their visit to Remuera with only three adding additional topics to those covered above:

> “Remuera attracts a different age group to Newmarket and is not very well advertised.”

> “Remuera doesn't have shopping malls and this is good.”

> “What about a 'welcome to our place' campaign ... something needs to be done to make ordinary people who have moderate incomes feel comfortable here. Ellerslie has a much better vibe in that regard.”

Key themes

Remuera’s reputation as a high-end retail shopping destination is well established with its boutique and speciality shops helping to create a ‘village’ feel to the area. The local cafés and restaurants also attract people and complement the retail shopping on offer.

To help visitors make the most of their time in Remuera, it is important to enhance available information (online and on-site) about public transport, parking facilities and directions to local parks, walkways and heritage sites. NZTRI's mystery visitors found that exploring the area by foot (or cycle) offered an opportunity to discover some of the older homes and heritage sites and buildings, as well as the parks and reserves. For visitors who are totally unfamiliar with the area, maps showing a broad range of attractions and places of historical significance may entice them to explore the area in more depth. This information should be backed by more signage, especially around areas of local interest and the shopping centre.

Retail shopping is certainly the main draw card to the area with nearly all of the visitors in the survey spending money locally. Offering more events such as festivals or regular farmers markets would also add to the experience of visiting Remuera, and help to create a more vibrant atmosphere. This would also enable visitors to mingle with locals and enhance a sense of community amongst residents who would, in turn, be happy to showcase 'their place' to visiting friends and relatives. Another way to attract families to the area is to build stronger links between green spaces and the Remuera shopping centre. Many visitors commented on the range of parks and children's playgrounds and more could be made of these recreation spaces.

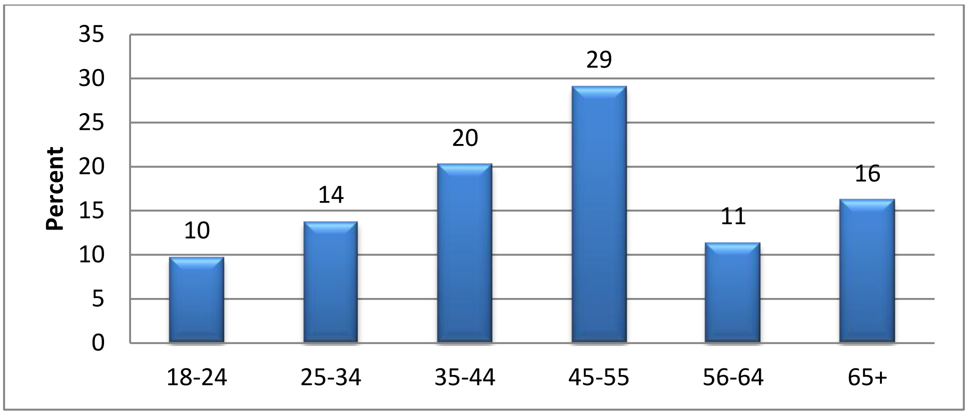
It is also vital that Remuera look to ways to develop and build on its range of offerings (including those that offer value for money).

Ellerslie

Visitor demographics

Females account for 63% of the sample. Nearly half (49%) of the survey sample are aged between 35-55 years of age (Figure 1). There is also good representation from the over 55 age group (27%).

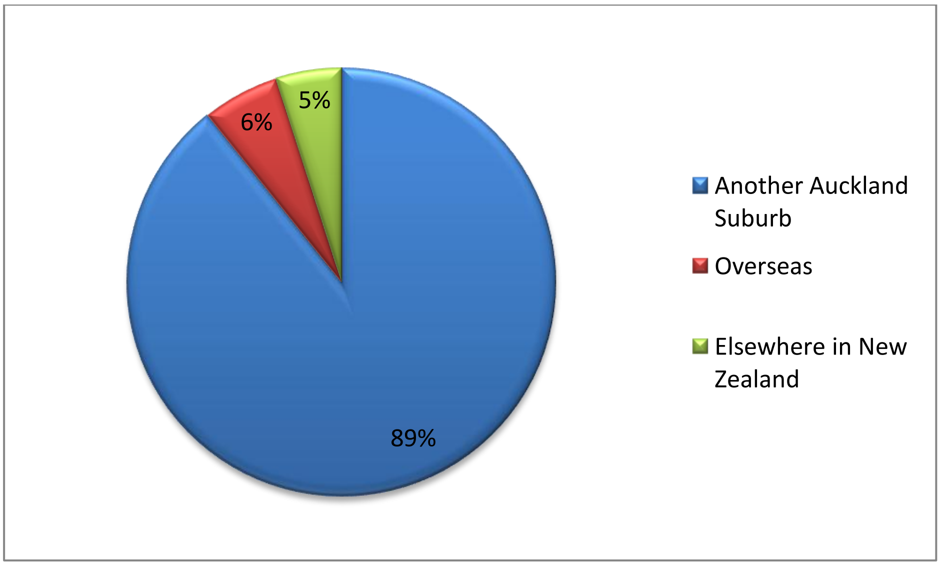
Figure 22: Age breakdown (n=124)



Nearly 90% of the visitors surveyed were from other parts of Auckland (Figure 23). Of the visitors (n=86) who provided further details, just under half (47%) were from Central Auckland, 23% from East Auckland, with the remaining 30% spread across West, North, and South Auckland. There was a small representation from domestic visitors (5%) from outside of Auckland.

Overseas visitors (n=7) made up a further 6% of those surveyed, with representation from Australia, South Africa, Brazil, Canada and Germany.

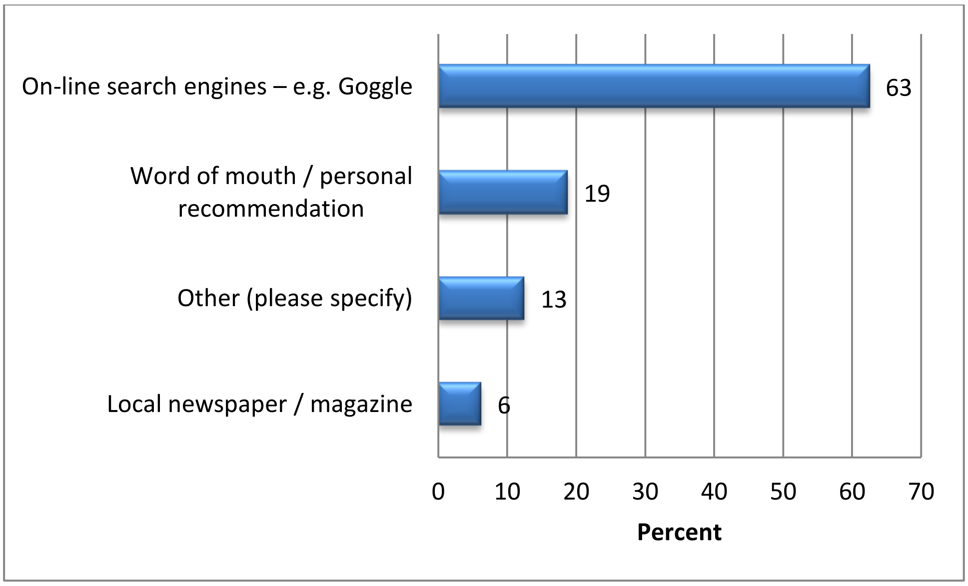
Figure 23: Where visitors come from (n=121)



Information sources

Only 12% of visitors to Ellerslie looked for information about the area before their arrival. Of these visitors, 57% stated it was 'easy' or 'very easy' to find information about Ellerslie. The two main sources of information used by these visitors were online search engines (63%) and word of mouth recommendations (19%) (Figure 24).

Figure 24: Main source of information used to find out about Ellerslie (n=15)



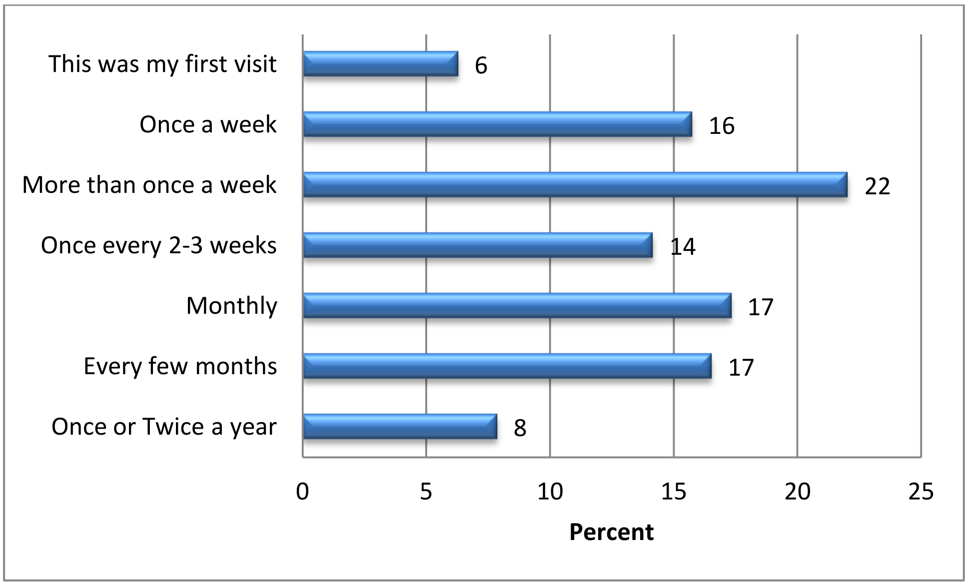
The vast majority (91%) of the visitors (n=77) who said they did not look for information prior to their visit already knew the area well, had visited Ellerslie previously or lived nearby. The remainder of these visitors stated either they just wanted to explore the area by themselves (6%) or they had their friends and family that they were visiting knew the area very well (3%).

Of the 67 visitors who responded to the question asking if there was anything about Ellerslie they would like more information on, nearly 60% responded 'no thank you' (n=40). The remaining visitor comments were about requests for more information on public and community facilities (n=16) such as the local post office and the library. Other requests for information included: events and activities (n=8), local maps including parks and recreational areas (n=6), and on local heritage and history (n=2)

Trip characteristics

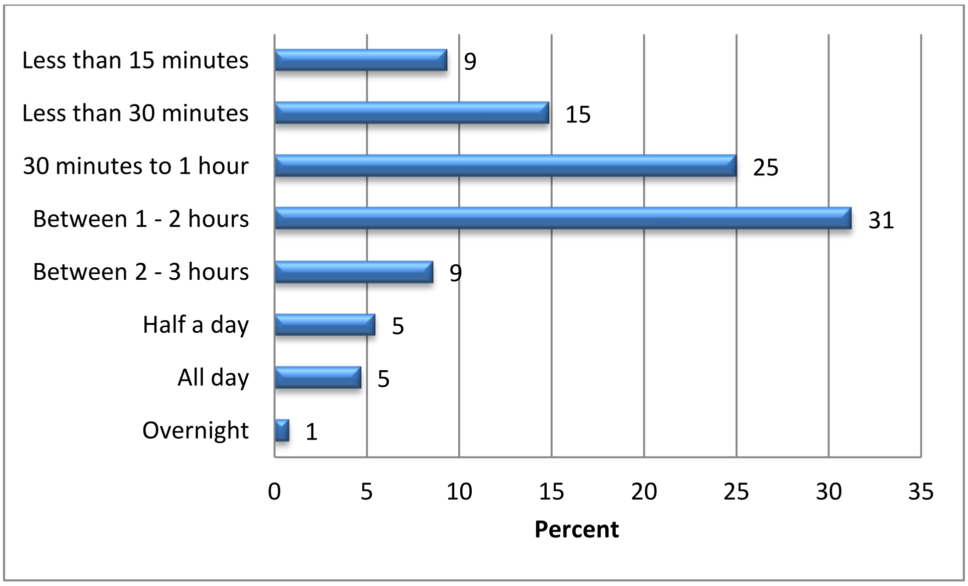
Nearly 40% of the visitors to Ellerslie are regulars, coming to the area at least once a week (Figure 25). Just over a third (34%) of visitor to Ellerslie are less frequent coming every one or two months. The survey sample also included 6% of first time visitors Ellerslie.

Figure 25: Visitation patterns (n=127)



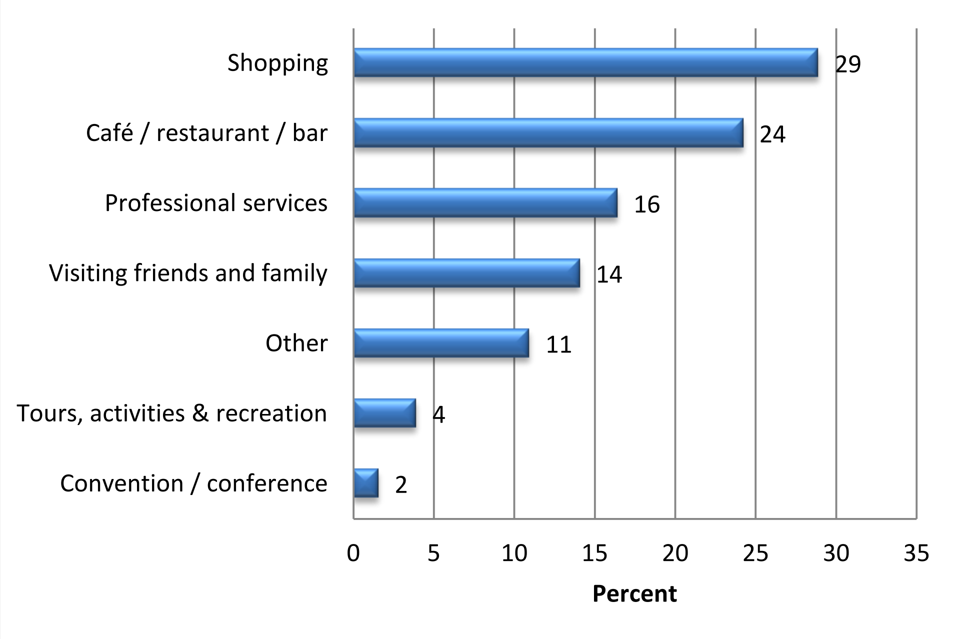
Just under half (49%) of the visitors surveyed stayed in Ellerslie for less than one hour – with a quarter (24%) staying less than 30 minutes. Forty per cent of visitors stayed between one and three hours (Figure 26). Only 11% of visitors to Ellerslie extend their stay to half a day or longer.

Figure 26: Length of visit (n=128)



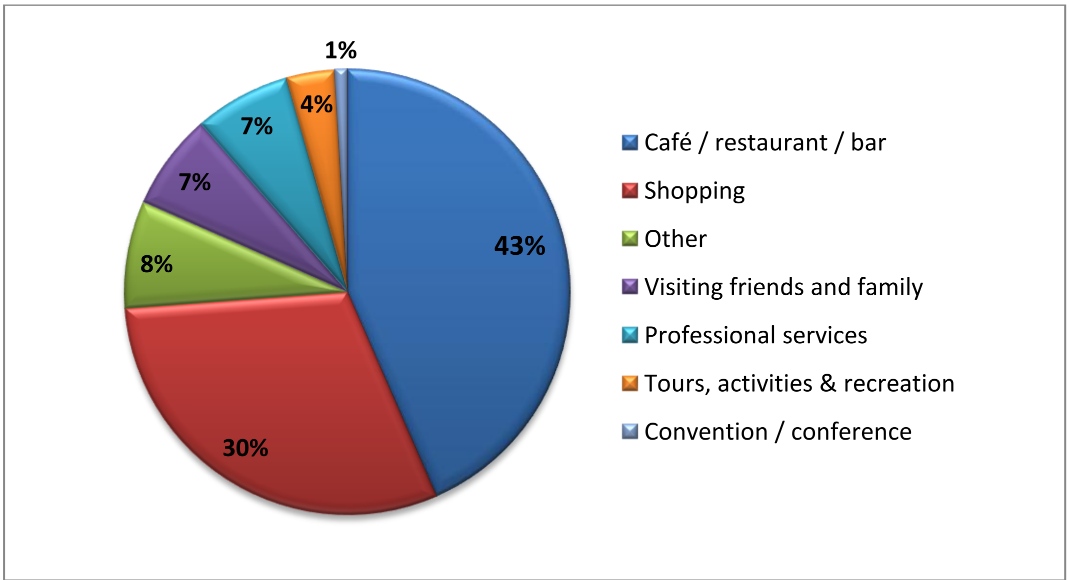
The two main reasons for visitors to come to Ellerslie are for retail shopping (29%), and to frequent local eateries and bars (24%) (Figure 27). Further reasons given by visitors included: professional services (16%) and to catch up with family and friends (14%). Visitors listed services such as health and beauty treatments, trips to the mechanic, and to the local post office as the main reason for their visit to Ellerslie.

Figure 27: Main reason for visit to Ellerslie (n=128)



Many visitors combine retail shopping with going to the local cafés or restaurants (43%) and vice versa (Figure 28). For those visitors who primarily come to Ellerslie for a coffee or meal, it is an opportunity to do some retail shopping before they leave the area (30%).

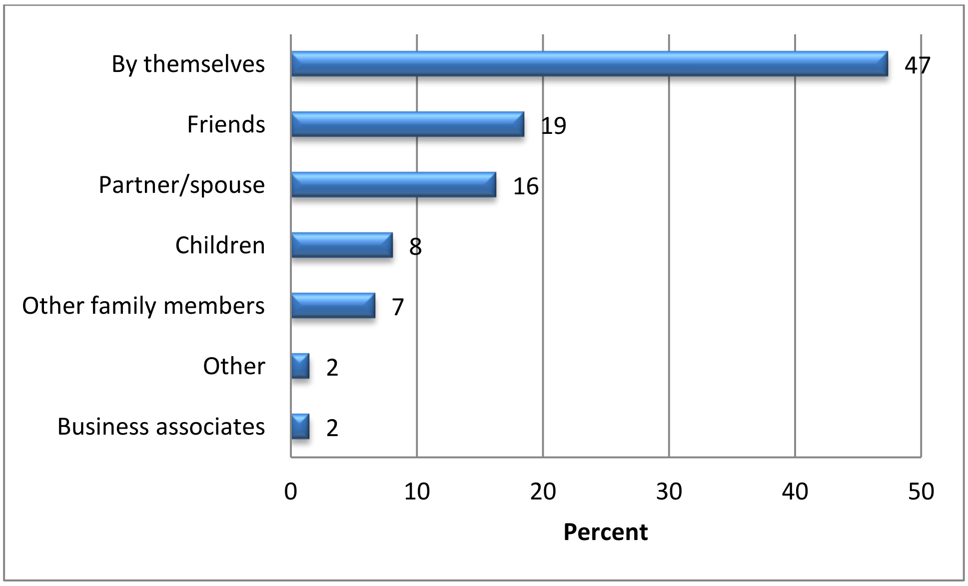
Figure 28: Other activities undertaken by visitors when in Ellerslie (n=115*)



**Visitors could select more than one option*

Nearly half (47%) of visitors to Ellerslie did not come with anyone else, with a further 35% accompanied by their friends or partner/spouse (Figure 29). Another 15% of visitors were accompanied by their children or other family members.

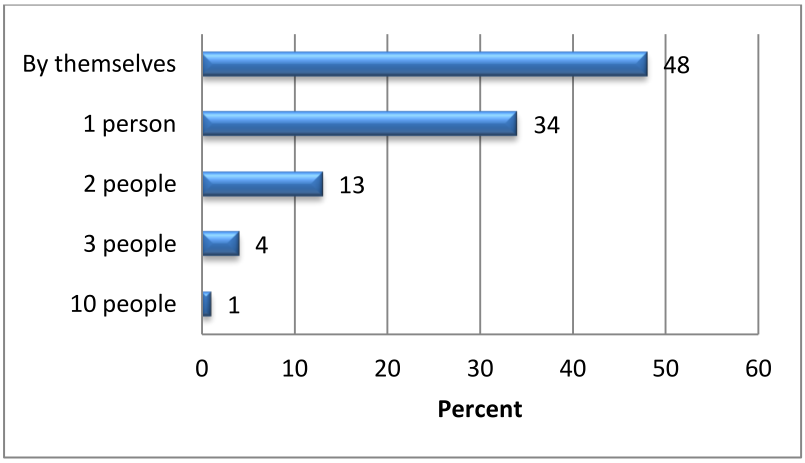
Figure 29: Who accompanied the visitor to Ellerslie (n=135*)



**Visitors could select more than one option*

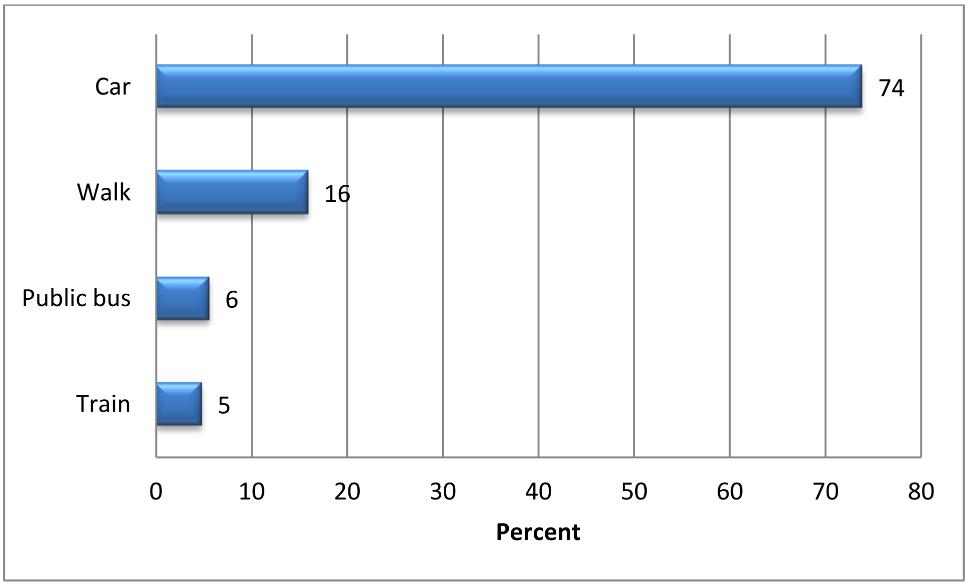
In terms of the actual group size, just under half (48%) of those surveyed were on their own, with close to another half (47%) of the visitors coming with one or two other people (Figure 30).

Figure 30: Number people accompanying the visitor to Ellerslie (n=128)



Approximately three quarters (74%) of the visitors came to Ellerslie by car (Figure 31). Other modes of transport included visitors that walked (16%) there from surrounding areas, and 11% of visitors who used public transport (bus and train).

Figure 31: Main mode of transport used get to Ellerslie and back (n=126)



The overwhelming majority (95%) of the visitors said that Ellerslie was easy to find. Of the 21 visitors who added a comment, over half mentioned it is generally easy to get to Ellerslie as “it’s very central” and they “know the area”, or “have been here before”. Visitors were also impressed by how accessible Ellerslie is via the motorway (29%) with one visitor commenting on how easy it was for them to come from Devonport for example. A further 14% of visitor comments highlighted how easy it is to travel to Ellerslie using public transport (train or bus).

> “A big attraction is that we can get there by train.”

Of the 5% of visitors who did not find it easy to find Ellerslie, their main their main concern was that the signage is “a bit on the vague side”.

When visitors (n=128) were specifically asked if there was adequate signage within Ellerslie to provide information on things for them to do and see in the area, close to 70% agreed.

Twenty of the visitors who answered ‘No’ added a comment. Of these visitors, just over a third (n=7) stated the existing signage was confusing and in some cases there were actually too many signs. Others stated they did not know or had never paid attention (n=9).

Expenditure

The overwhelming majority of visitors (91%) surveyed spent money at local businesses during their time in Ellerslie.

The average visitor spends $44.38 during their visit to the area (Table 5). The majority of the visitor expenditure went to retail shopping ($13.82), followed by professional services ($9.83) and food and drinks ($9.06). These expenditure figures for all respondents are based on a total of 203 people including 182 adults and 21 children (survey respondents could include others in their spend information).

Table 5: Visitor expenditure per sector (per visit)

Expenditure item	**% spend in sector - all respondents *(n=203)**	**Spend per person (NZ$) - all respondents *(n=203)**
Retail shopping	31.15	13.82
Professional services	22.14	9.83
Food / drink (café/ restaurant/ bar / takeaway food)	20.41	9.06
Food shopping (supermarket etc)	12.62	5.60
Tours, activities & recreation	11.62	5.16
Local transport	0.88	0.39
Other	0.63	0.28
Events	0.55	0.25
Total	**100.01**	**$44.38**

Visitor satisfaction

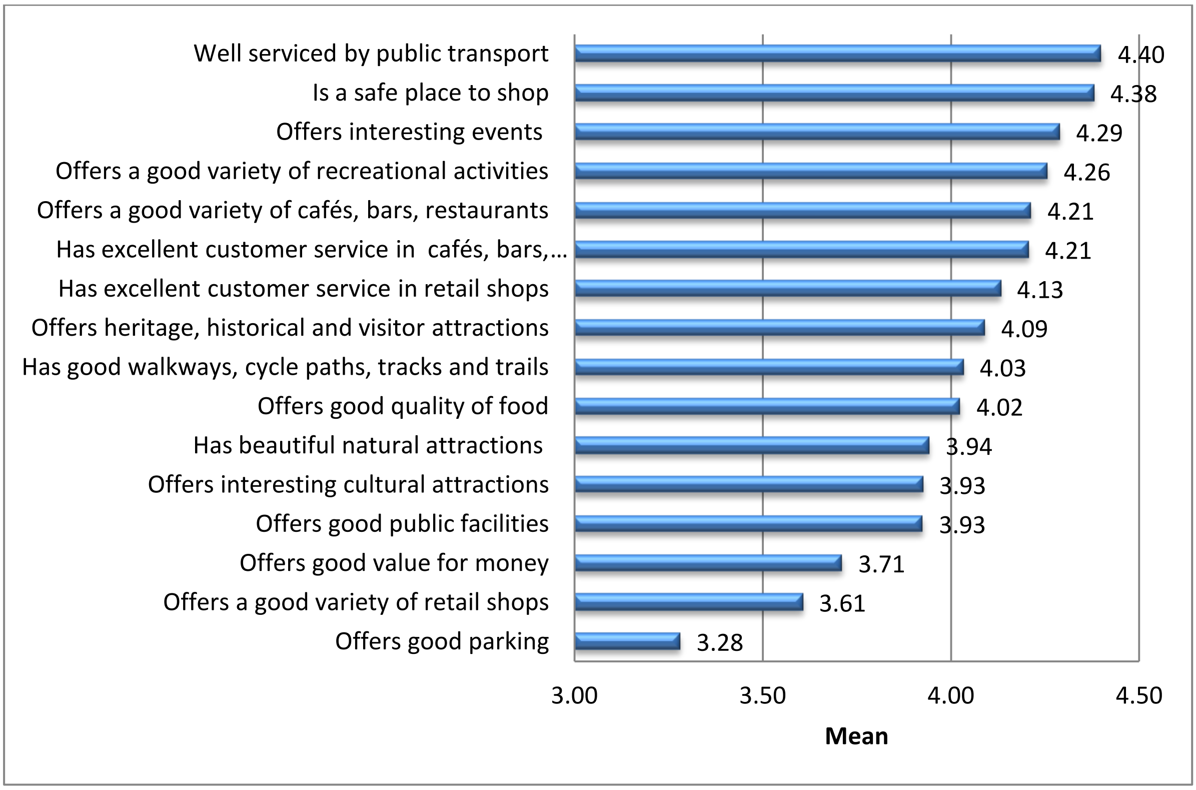
Visitors were asked to respond to a number of statements regarding their recent trip to Ellerslie (scale of 1 – strongly Disagree to 5 - strongly Agree) (Figure 32). The mean responses for all elements ranged from 3.28 to 4.40 out of 5.

Visitors feel strongly that Ellerslie is well serviced by public transport (4.40 out of 5) and that it is a safe shopping environment (4.38). Visitors also agree that Ellerslie has interesting events (4.29) and also offers a good variety of recreational activities (4.26).

Visitors were impressed with the standard of customer service they received in the local cafés, bars and restaurants and by the good variety of cafés, bars and restaurants (both at 4.21 out of 5).

Visitor response to the statement that Ellerslie offers good value for money (3.71), a good variety of retail shops (3.61) and good parking (3.28) all rated relatively poorly (Figure 32).

Figure 32: Visitor ratings on selected aspects of their trip to Ellerslie (mean) (n=120-122)



Of the 25 visitors who added a comment about their feeling about Ellerslie as a place to visit, just over a quarter (27%) commented on the need for more parking both during the week and on the weekends. Visitors also commented on the need for more sports facilities, attractions, activities, and retail options (n=6).

> "Every time a new chain store cafe opens you destroy the chance to create an authentic community".

> "I would visit Ellerslie more if it had more places for children, like a good park with covered playgrounds".

Positive comments included that there were good restaurants, cafés and organic food outlets.

> "Ellerslie Village has not changed a lot in many years and that is a really good thing as it has always been a friendly pleasant place to shop and eat".

Over 80% of the visitors surveyed offered their opinion on what they found most attractive or appealing about Ellerslie as a destination. Around a quarter (24%) of the total comments related to: the appealing "village atmosphere", the "friendly people" and "community feel" of Ellerslie. Another quarter of comments mentioned how appealing the range of cafés, restaurants, and specialised food outlets in Ellerslie were e.g. the butcher, organic food shop and bakery.

Other appealing features about Ellerslie according to visitor comments included how easily accessible it is (n=16) and the range of retail shops (n=16) in the area. Ellerslie's historical architecture was also mentioned (n=7). Ellerslie's natural attractions were also mentioned (n=9) particularly the 'big green trees' on the Cornwall Park side. Comments included:

> "The old buildings are nice, especially the older styles houses."
>
> "The churches and the bridge are such a historical site and I just love the architecture of these buildings."
>
> "Love the old houses and wide streets and lots of old trees."

Nearly 100 visitors responded to the question asking about the least appealing aspects of their recent trip to Ellerslie, many made more than one comment. Nearly half (47%) of the total comments were about the high volumes of traffic in Ellerslie and the lack of parking:

> "It's too noisy because there is a lot of traffic in the area."
>
> "Parking, traffic congestion in shopping area, grumpy, impatient drivers."
>
> "Too many cars and too busy for pedestrians."

Around 30% of the visitor comments focused on the lack of retail shops, public facilities and spaces, and local infrastructure:

> "There is a lot of rubbish on the street and the graffiti around the place is terrible."
>
> "Need more green space and public toilets."
>
> "Some shop fronts in need of upgrading."

Another 20% of the comments were from visitors stating that there was nothing unattractive about Ellerslie as a place to visit.

Return visit and visitor recommendations

The overwhelming majority (97%) of visitors would visit Ellerslie again with just over 80% happy to recommend it to others as a place to visit.

Over 90 visitors added a comment as to why they would be returning to Ellerslie in the future. Over half (56%) highlighted the variety of speciality shops, cafés and retail shops in the area, as well the professional services on offer as the main reason why they would return. Comments included:

> "Nice shops with quality cafes all in close proximity to one another and close to public transport."

"Restaurant staff go the extra mile with service and enjoy welcoming back clients."

"Like the shops and for professional services which are located there."

Other visitor comments (17%) emphasised coming back to see friends and family living or working in the area:

"Ellerslie is close to where my sister lives so I'll be back when I visit her."

"My friend works there and I like to visit during her lunch break and it's an excuse to shop too."

The convenience and atmosphere of Ellerslie accounted for a further 17% of comments, including:

"It's a friendly place and very accessible."

"Better atmosphere and environment than Lunn Ave, my alternative local shopping area."

Of the small number of visitors (n=4) who would not consider revisiting Ellerslie the reasons given are summed up in these two comments: "There are other places to go, so this is just a one off" and that "the area is boring and lacks interest".

Half of the visitors surveyed (n=69) added comments as to why they would recommend Ellerslie to others. Of the total of 95 comments made by visitors 77% highlighted the variety of the local speciality food stores and cafés, the retail shops and because it had a village or community feel as the main reasons why they would recommend to the area. Comments included:

"It has a good variety of places to eat and share a coffee with friends and family."

"Ellerslie has a good feel, good close community and is relaxing."

Visitors also noted the racecourse (n=4) and parking facilities (n=4) as good reasons to recommend Ellerslie as a place to visit:

The 'other' reasons for recommending Ellerslie included visiting the historical buildings, beauty salons, spending time with friends or searching for second hand books (n=13).

For the 23 visitors who would not recommend Ellerslie to others, the reasons provided focused on there not being enough to do (39%); that "there are other better places to visit" (26%); a lack of retail shops and poor value for money (13%). Comments included:

"There is a lack of shops and the prices for produce aren't worth it."

"It is a narrow, sad little community, becoming worse with the introduction of various chain-type stores."

Suggested Improvements

Over 60% of the visitors surveyed (n=82) took the opportunity to make a comment when asked about any suggestions on how Ellerslie could be improved as a visitor destination. Nearly a quarter (24%) of the 89 visitor comments stated that they liked Ellerslie the way it is and did not want any changes or improvements in the area:

"Don't tell anyone else how good it is so that it will remain a good place to visit."

"Allow the community to grow naturally. Value green space such as Michaels Ave Park used to be."

Nearly half of the comments highlighted issues related to better parking, improving public facilities, wider roads/ slow traffic, and making the area more pedestrian friendly. Comments included:

"Car parking, it's quite a nightmare to find a park."

"Reduce traffic flow, more outside sitting areas."

"Open up the road by making it wider to stop traffic congestion."

"Make it easier and safer for pedestrians to cross the road."

Comments were also made about a general revamp of Ellerslie's image - "Welcome to our place" by "splashing a bit of paint about" and getting shopkeepers to work together and to "start thinking as a village unit." Other comments included:

"More hanging baskets and vintage to complement its history."

"Hanging flower baskets to improve village feel."

The 'other' suggestions (12%) include the need for a local guidebook or information map/pamphlet about the area, and to have more events or markets.

"Provide interesting short walks, e.g. heritage trail, etc. Publicise your excellent stand-out shops."

"They need to create a draw card like a play or exhibition then there may be a spin off for local businesses."

"Great potential for a weekend local craft/farmers market."

Visitors also added comments on improvements to the quality of shops and food outlets (10%).

Key Themes

Ellerslie as a destination enjoys a loyal following of visitors while still attracting a few ‘first-timers’ or ‘new’ people to the area. The types of visitor coming to the locality have the profile and background that should lead to a relatively good level of spend so it is important that local businesses continue to look for opportunities to enhance the visitor experience.

Visitors who were unfamiliar with Ellerslie indicated that they would like more information about the area so they can make informed choices. The types of information visitors are looking for is about local events and ‘things to do’ in the area; supported by a map showing general information on parks and recreation areas and important sites.

Retail shopping is an obvious draw card to the area with nearly all of the visitors in the survey spending money. Visitors are coming to Ellerslie for specific purchases, such as organic products and meat from the butcher; there is an opportunity to build on this by developing a broader range of retail experiences over time.

In order to encourage visitors to stay longer, and spend more time (and money) in Ellerslie there is a need to offer them a range of ‘things to do’ that include, but are not limited to, eating, drinking and shopping. Visitors clearly thought that Ellerslie lacks interesting cultural, and heritage attractions. This highlights an opportunity for local businesses and the community to look for ways to showcase what is already in the area especially given the existing historic buildings and churches.

Visitors regard Ellerslie as a safe shopping environment with a friendly “village atmosphere”. More can be done to capitalise on this by building on Ellerslie’s reputation as a place to find small speciality shops which help to create a real ‘village’ feel to the area. Quality and value for money are also important.

Business Survey

The business survey data comprises of 42 completed surveys, with representation from businesses in Ellerslie (62%), Remuera (24%), and 12% from Tamaki Drive (Okahu Bay, Mission Bay, Kohimarama and St Heliers).

Under half (45%) of the business owners surveyed were permanent residents in the area where their business were located. Around half (48%) of the businesses responding have been operating for up to 10 years, the remaining businesses being well established in the Orākei Ward with 17% of these in business for over 25 years. Half of the survey respondents owned the business, with a further 26% in a management role.

The survey sample had representation from all the main sectors - Retail / Business (n=37), Visitor Activities/Tours (n=19) and Accommodation providers (n=10). Within each sector a proportion of businesses had secondary interests to complement their core activities which added to the diversity of the survey sample.

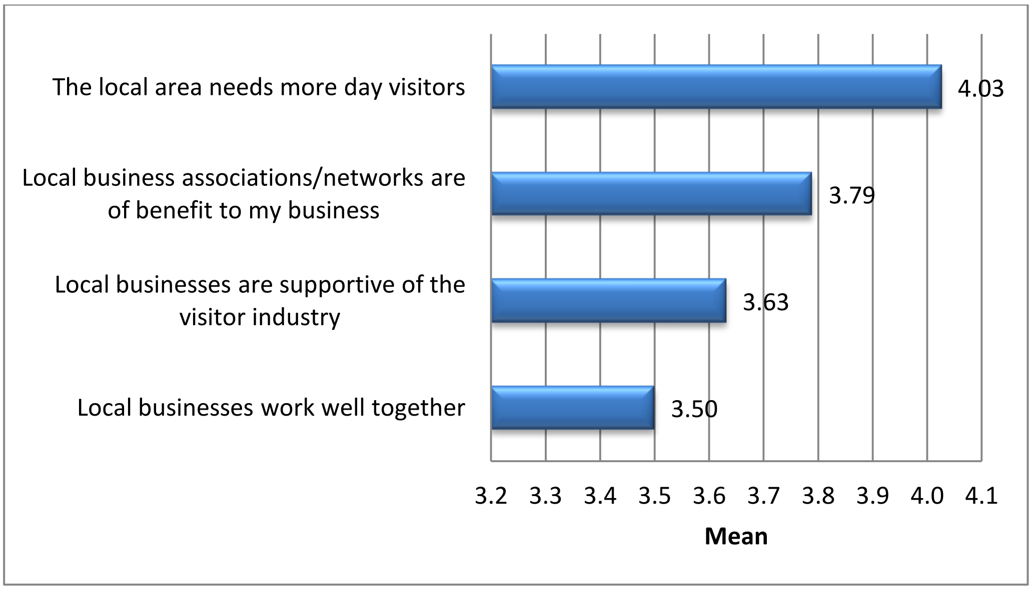
Visitor Industry

The business owners were asked to respond to a series of statements about the visitor industry with the highest level of agreement being the local area needs more day visitors (4.03 out of five) (Figure 33). Business owners also agreed that local business associations / networks benefit their businesses (3.79). The lowest level of agreement (3.50) was that local businesses work well together.

Business operators were also asked to respond to a number of statements regarding their perceptions of the visitor industry and local business networking (scale of 1 – strongly Disagree to 5 - strongly Agree). The mean responses for all elements ranged from 3.50 to 4.03 out of 5.

There was a strong level of agreement that the local area(s) (Tamaki Drive, Remuera and Ellerslie) needs more day visitors (4.03 out of 5). Business owners/operators' level of agreement was lower however when asked if the local business are supportive of the visitor industry (3.63). It is clear from the survey that respondents do not think that local businesses work well together – the lowest at 3.5 out of 5.

Figure 33: Local businesses - perceptions of the visitor industry and local business networking (n=38)



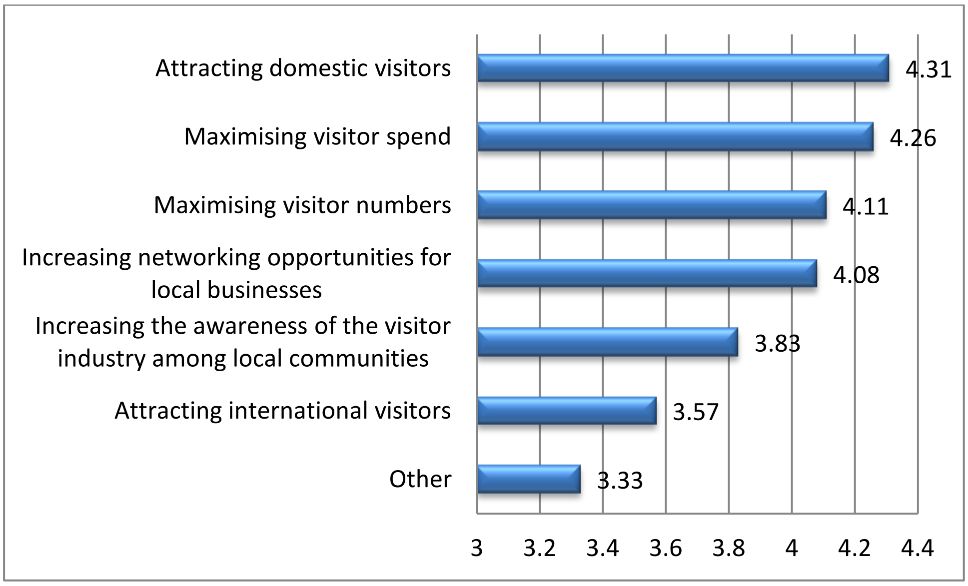
A couple of businesses (n=4) added a comment about the need for more visitors, with one operator stating "the best visitors are the ones who actually live in the ward area."

Only 13 of the local businesses gave details about the business organisations and/ or industry organisations that they belonged to. Of these businesses, 67% belonged to one of the local business associations (n=10) specifically; Remuera, Mission Bay, or Ellerslie

Business Associations. Just over a quarter (26%) belonged to Industry Associations (n=2) and Tourism Associations (n=2) (TIANZ, CTONZ).

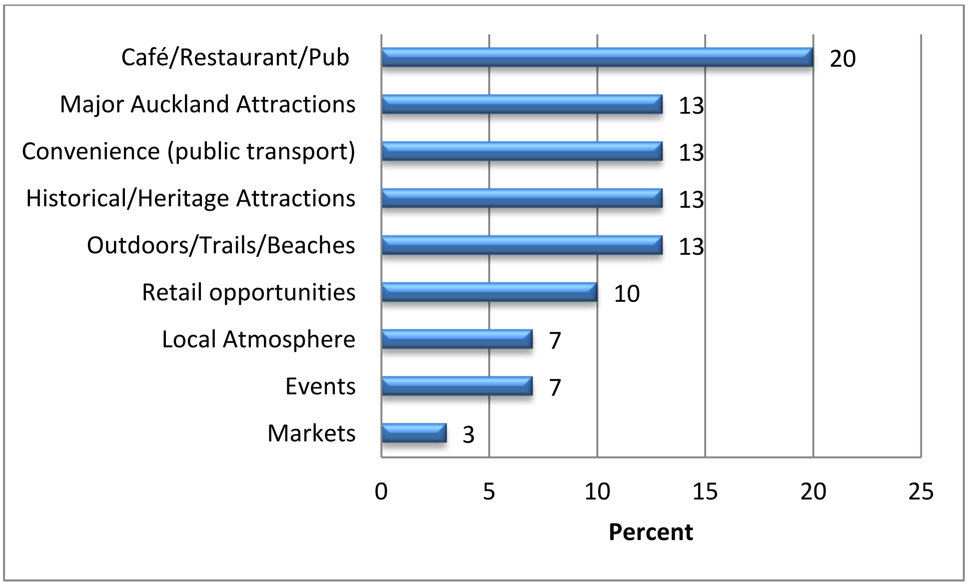
Business owners were asked to rate a series statements on the importance of the visitor industry in their area (Figure 34). Attracting local visitors (4.31 out of 5) and maximising visitor spend (4.26) were rated the most important. Considered the least important is increasing the awareness of visitor industry among local communities (3.83) and attracting international visitors (3.57 out of 5).

Figure 34: The importance of the visitor industry to the destination area (Tamaki Drive, Remuera and Ellerslie) (n= 38)



Business operators were asked what attractions in their local area they would like to highlight to visitors. Of the 30 responses given, 20% would highlight the local café/restaurant/pub scene, 13% outdoor recreational activities in the area and 13% the local historical / heritage attractions (Figure 35). Local businesses also wanted to highlight the convenience of getting to their area and the ease of parking etc (13%)

Figure 35: Nearby attractions businesses would highlight to visitors coming to the area (n= 30*)



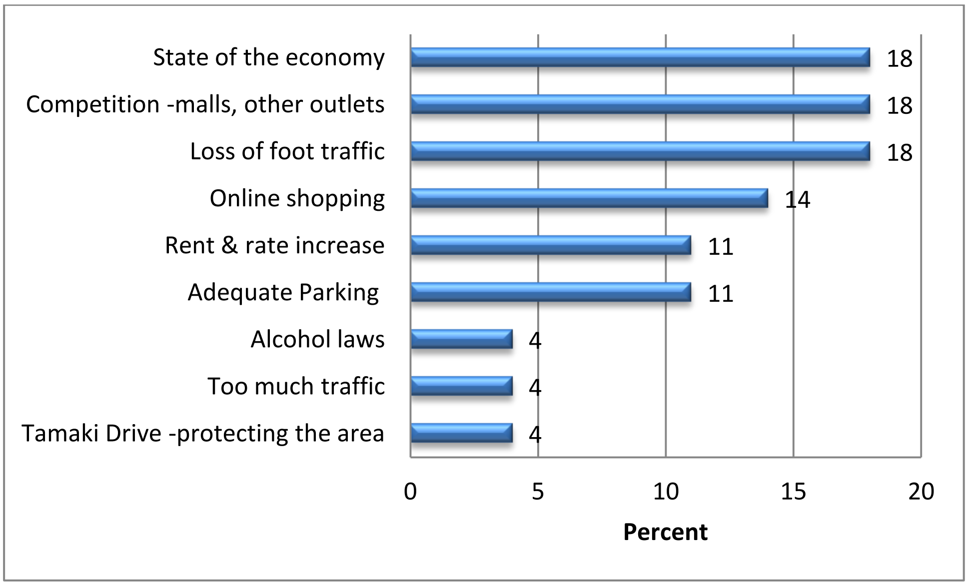
*Businesses could offer more than one suggestion

Business operators comments about highlights to visitors coming to the area include:

> "The outstanding beaches and views, the village atmosphere of St Heliers - while it lasts."
>
> "Very easy to access due to close proximity to motorway and rail/bus routes."
>
> "Achilles Point, Historic sites e.g. Treaty Waitangi signing, coastal walk, parks."

The three major challenges identified by businesses (n=20) in the next five years are the competition from malls and other similar outlets (18%), the state of the economy (18%), and the loss of foot traffic in their areas (18%) (Figure 36). The threat from online shopping was also noted as an ongoing challenge (14%). Businesses would like to see "more visitors and more local customers, and [who] preferred to shop locally."

Figure 36: The major challenges businesses believe they will face in the next five years (n=28*)



*Businesses could offer more than one challenge

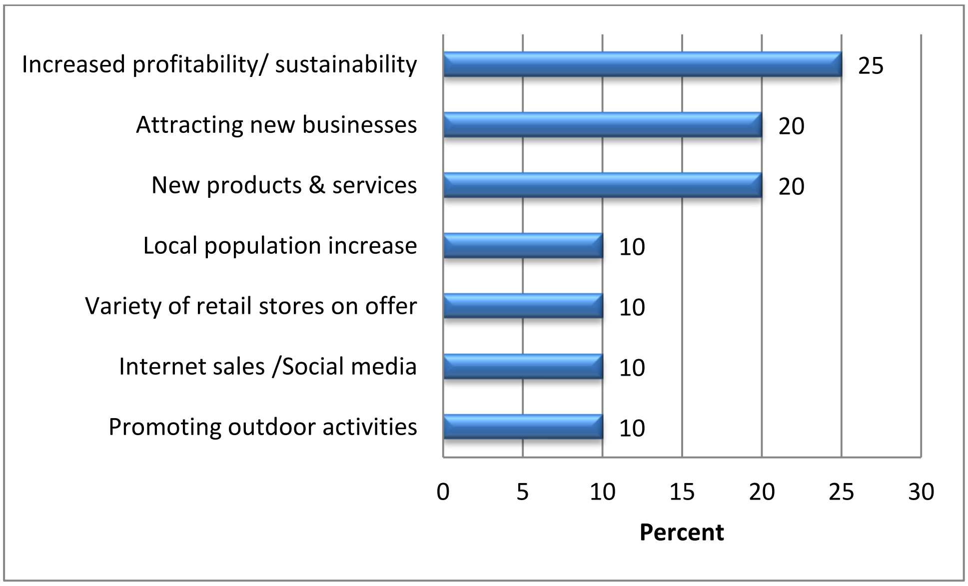
Business owner/operators' comments on the challenges they would face included:

> "Internet shopping, rent and rates increases. Property values increasing making small business unsustainable."

> "The overall economy, the US / NZ exchange rate…the destruction of St Heliers."

The three major opportunities identified by businesses (n=16) in the next five years are to concentrate on increased profitability and sustainability (25%), attracting new businesses to the area (20%) and introducing new products and services (20%) (Figure 37). Making better use of social media and increasing internet sales are also highlighted (10%).

Figure 37: The major opportunities for businesses in the next five years (n= 20*)



*Businesses could offer more than one opportunity

Business owners/operators' comments on the major opportunities for them included:

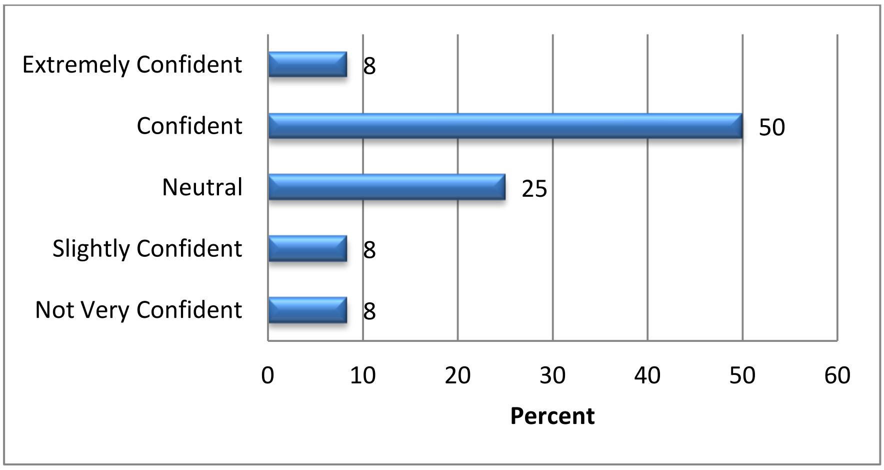
> "The increasing interest in outdoor activities and cycling in particular."

> "Seriously considering relocating, therefore stimulating new growth in an area more suited to our business."

> "Growth potential as the awareness of my business increases."

Half of the local business owners surveyed are confident that their business will do well in the coming year based on a scale of 1-5 (where 1 = not very confident, and 5 = extremely confident). Of the 36 businesses responding 50% are 'confident' with a further 8% being 'extremely confident' (Figure 38). Less than 20% of the business owners are slightly confident or not very confident that their businesses will do well in the coming year.

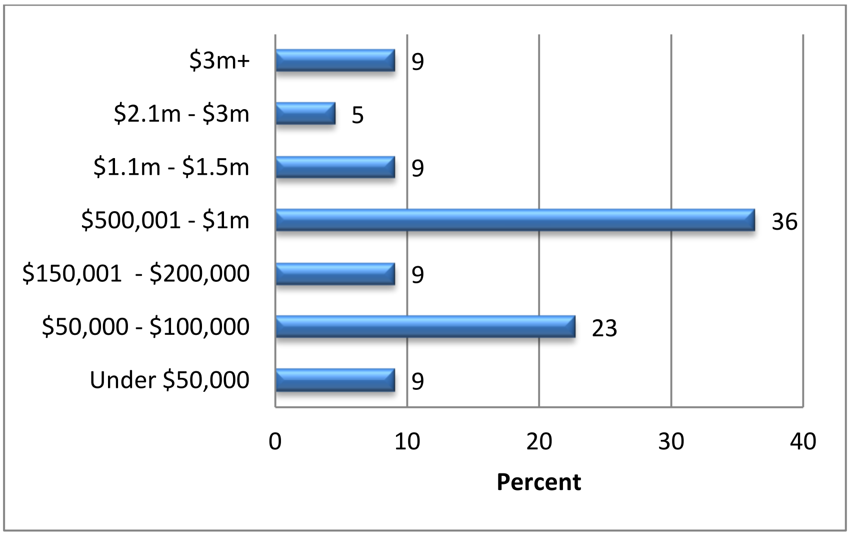
Figure 38: Level of confidence that businesses will do well in the coming year (n=36)



Revenue, costs and linkages

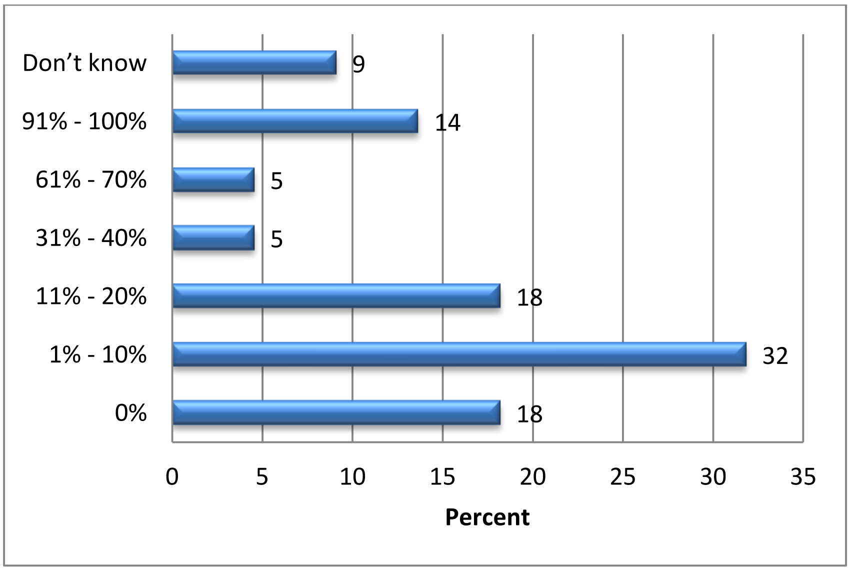
The annual turnover for over a third (36%) of the businesses (n=22) surveyed is $500,000 to $1 million in the last financial year (Figure 39). Less than 10% of the businesses reported an annual turnover of $3 million or more.

Figure 39: The approximate annual turnover of businesses in the last financial year (n=22)



Business owners/operators were asked for further details about their finances including what percentage of the annual turnover they estimate comes directly from visitors. Just under a third (32%) of the businesses who responded (n=22) estimated the visitor industry contributed between 1- 10% to their annual turnover. On the other end of the scale 14% of businesses (n=22) estimated the visitor industry contributed 91-100% of their annual turnover (Figure 40). A further 18% of businesses stated the visitor industry contributes nothing to their annual turnover.

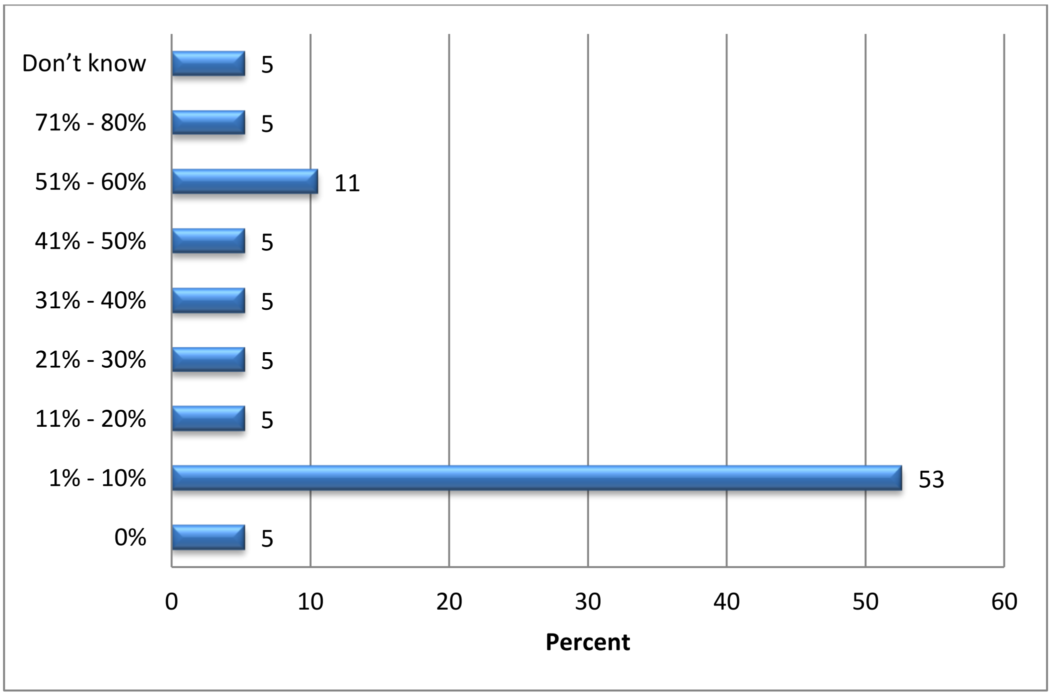
Figure 40: Approximate percentage of the annual turnover that comes directly from visitors to the area (n=22)



Businesses were asked to provide a breakdown of the annual business expenses (as a percentage of total expenses) for Labour (wages and salaries) and Non-Labour Expenses (e.g. rent, power, phone, consumables). Of the 22 businesses providing this information the average for Labour was 46% (range 10% to 80%) of the annual business expenses. For Non-Labour Expenses the average was 54% (range 20% to 90%) of the annual business expenses.

Businesses were also asked what percentage of their non-labour expenses they spend annually on products and services supplied by businesses in the Ōrākei area. Just over half (53%) of the businesses responding (n=19) stated 1-10% of their non-labour expenses is spent annually on products and services supplied by businesses in the Ōrākei area (Figure 41). Only 16% of the businesses indicated that between 51% to 80% of their non labour expenses are spent annually on products and services supplied by businesses in the Ōrākei area.

Figure 41: Approximately percentage of non-labour expenses spent annually on products and services supplied by businesses in the Ōrākei area (n=19)



The only two comments added about the visitor industry in the local area on completion of the survey were location specific as follows:

> "Tamaki Drive is the jewel of Auckland - we must allow it to be destroyed by developers and Auckland Council."

> "Have some events and markets which will get people in Ellerslie."

Conclusions and recommendations

Visitors to all three local areas enjoy the bars, restaurants and vibrant café culture, beautiful coastline, recreational spaces, and landscapes on offer in the Orakei Ward. Tamaki Drive, Remuera and Ellerslie are popular with visitors with many returning on a regular basis, however while local businesses are generally confident that they will do well in the coming year, they cannot rest on their laurels and must continue to look for opportunities to enhance the visitor experience and to increase economic yield.

Visitor spend is strong in the hospitality/entertainment sector but there are clearly things that can be done to bolster spending in the other sectors especially retail shopping along Tamaki Drive. Visitors to both Remuera and Ellerslie appreciate the small speciality shops that help to create a real village feel to these areas. The local cafés and restaurants also attract people and complement the retail shopping on offer. Visitor spend in both the retail, and the food and drink sectors are good but people are not staying in the area long enough for local businesses to maximise economic yield. In Tamaki Drive, people are staying longer but they are not connecting with the retail area to any great extent in Mission Bay and St Heliers. Expenditure per person per visit along Tamaki Drive ($21.22) is approximately half of that in Ellerslie ($44.38) and Remuera (48.83).

To encourage more visitors to stay longer and spend more, there is a need to offer a more diverse range of ‘things to do’ (other than simply to ‘eat and drink’). Better links to existing trails parks and walkways, and cultural and heritage attractions are needed in all three areas. The Phase 1 tourism audit revealed that there is also a need to improve the links to anchor attractions in all three local areas. It is important to find ways to keep the distinctive friendly village atmosphere of St Heliers, Mission Bay, Remuera and Ellerslie, but at the same time find ways to inject new retail opportunities, and to develop and promote activities which will attract more visitors and keep them coming back.

Better signage both in and around all three localities would help to guide visitors around the area and let them know what there is to do and see. Promoting the benefits of connecting to these localities at a deeper level by walking and cycling, as well as encouraging bus and train travel, is a positive way to respond to the issue of lack of public parking that featured strongly in visitor comments.

As an increasing number of areas in Auckland are also trying to build their brand around trendy bars, restaurants and cafés, it is vital to look to ways to develop and build on the range of experiences, and to enhance the quality of service and value for money being provided. All three local areas need to be doing their utmost to stay ahead of the competition by strengthening the experiences and variety of offerings provided to visitors. This is best done by improving linkages between business, and encouraging community engagement with the visitor industry so that the visitor can be better informed of ‘what’s on’, ‘things to do’ and ‘where to go’ and to know more about the people and places in order to grow a relationship with these destinations. One way to do this is to strengthen network ties and work with the Visitor Strategy Group established in Phase 1 of the research - a group of key individuals who can collaborate to achieve short and long-term goals and guide the development of a visitor strategy for the Ward. Local tourism reference groups of this nature are already established and active in similar areas in the Auckland region e.g. Devonport, Matakana Coast & Country, and competing destinations in the Hauraki Gulf.

Building local economies and ‘sense of place’

The visitor economy takes into account broader economic activity than that which is usually defined as ‘tourism and events’. It includes the direct and indirect impacts and linkages resulting from a person (visitor) travelling outside their usual environment for retail shopping, a short excursion or day trip, a holiday, leisure, events, business, conventions and exhibitions, education, and to visit friends and relatives. It includes intra-regional (Aucklanders), other domestic, and international visitors. The results of the Business Survey show that there is a need for a broader understanding of the visitor economy and of ways to engage with it.

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 'sense of place' for each of these diverse local areas. While it is good to come up with new ideas and create new experiences the best way to achieve an immediate impact is through the improved performance of partners and stakeholders through enhanced networking and collaboration.

To intensify cohesion across the Orakei Local Board area and to put in place a coordinated approach to tap into the full potential of the visitor economy, we believe there is merit in the idea of developing a three-year Visitor Strategy for the Orakei Ward.

Immediate opportunities

1) Develop themed trails, focused on heritage and culture: In all three local areas visitors expressed that they would like a more enriching experience, with a broader variety of 'things to do', augmented by stories of the history (and culture) associated with the land and the sea. Walking Trails could incorporate different customised themes.

2) Enhance visitor 'sense of place' (online and on-site): Findings from the Local Tourism Audit of the Phase 1 research and the full Visitor Survey show that there is an overall lack of local information and stories that can create a 'sense of place' to properly appeal to the visitors and give them a reason to 'slow down', stay longer and spend more money once they arrive. The type of information that would be useful for locals and visitors alike includes: information about the cultural and historical significance of the natural and built environment (e.g. heritage buildings, culturally important 'sites'), local sports and water sport activities, arts/culture, music, environmental groups, schools, walks, community organisations etc. There is a need to create a stronger identity online – one that connects the visitor with the local people, places and spaces for each local area.

3) **Mobilise the locals:** Local residents matter. 'Visiting friends and relatives' rated highly as an aspect of the visit in each of the three local areas. 'Word of mouth' is an important source of information for visitors who get tips on places to visit from friends and relatives. The Orakei Ward Demographics Report Card (2012, drawing on 2006 census data) shows that 33% of the population were born overseas, many will have visitors who come from other parts of Auckland, elsewhere in New Zealand, and overseas. There is an opportunity to mobilise locals in the marketing mix, to help the visitor uncover and delayer the destination, and to tap into social networks of local residents – encouraging them to take their guests with them as they explore their own part of Auckland.

Local residents can also be integrated with initiatives to enhance the visitor experience. In Tamaki Drive, for example, there is an opportunity to recruit and train a team of local hospitality ambassadors similar to the 'blue coats' – volunteer information guides at Auckland Airport. This would be a volunteer scheme where 'local hosts' would be positioned at key points along Tamaki Drive to give information about the area at peak times. Local Hosts could: give directions to parks and green spaces, provide information about the history and the natural environment, or highlight local events and 'things to do'. This should not be restricted to older or retired people – but involve people of all ages. Here it is worth considering the Global Greeters Network (*globalgreeternetwork.info*) as an example of how this may work.