



tourism
INDUSTRY
ASSOCIATION NEW ZEALAND

Submission to inform the Outdoor Recreation review

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The value of outdoor recreation to New Zealanders

It is extremely difficult for an individual or organisation to define the value of outdoor recreation to New Zealanders – in doing so we are likely to be too greatly influenced by our own reality of life: schooling, parental influence, socioeconomic position, culture, urban or rural upbringing, age and a host of other factors that shape who we are, the lives we lead and the value we place on recreation and the outdoors. In short, we are all unique.

Charged with putting forward a TIA perspective on outdoor recreation, a number of questions spring to mind:

Who is being targeted as part of the review? Is it 'all New Zealanders' or are some segments of the population already over represented in outdoor recreation and others under represented? Should recommendations focus on maximizing outdoor recreation opportunities and value for under represented groups, assuming these can be identified?

Where and what are the current outdoor recreation opportunities and how do we maximise the value of these for specific groups and/or for all New Zealanders? What new opportunities exist for outdoor recreation and what can be done to motivate greater participation?

Lastly, it seems reasonable to set some targets against which the success of any recommendations can be measured.

As a nation we are extremely fortunate to have such large tracts of land (including National Parks and Reserves) in comparison to our population. The great recreation opportunities in New Zealand should be a draw card for keeping New Zealanders in New Zealand as both a holiday destination and as a place to live, pursue a career and raise a family.

As previously mentioned, defining the value of outdoor recreation is subjective; however in a broad sense the values must include the following:

1. National identity.

Whether New Zealanders actively participate in outdoor recreation or not, TIA believes there is an underlying pride in our ability 'as a nation' to work and play within a landscape that is often physically and mentally challenging. Clearly our national identity is moulded by a multitude of factors including outdoor recreation.

2. Physical wellbeing

Evidence abounds about the physical benefits of an active lifestyle. For many, a primary motivation for outdoor recreation is to maintain good physical health in an outdoors setting. The outdoors provides the motivation and an invigorating setting in which to keep fit.

3. Emotional wellbeing

Appreciation for the environment will be sparked by responses to taste, touch, sight, sound and smell. While the intensity of emotions will vary between individuals, it is commonly accepted that senses are heightened within an outdoor setting. Relief from stress and a positive reordering of life's priorities all tend to flow from undertaking outdoor recreation.

4. Communing with nature.

Recreating in the outdoors takes many forms, but the common thread linking them is an affinity with and appreciation for the environment in which they are undertaken. It is perhaps this more than anything else that invigorates and motivates many outdoor recreationalists.

5. Education.

Outdoor learning happens in many ways, both formally and informally.

For example, commercial recreation tends to have a strong focus on cultural and environmental interpretation. This covers more than the passing on of facts; it is a formal attempt to create stories and make links that are both meaningful and entertaining to the visitor.

Another example of formal education is provided by the many outdoor training organisations that take individuals and groups into an outdoor setting to instruct them on one or more of a wide selection of outdoor skills.

Informal education encompasses the endless range of learning that occurs simply from being in the outdoors, for example risk management, independence, leadership and self control - down to hard skills like river crossing, fire lighting and hut etiquette.

Outdoor recreation is one of the best ways to learn about yourself.

6. Social.

For many, outdoor recreation is about undertaking an activity with likeminded people and enjoying their company; often friendships are forged while undertaking a challenging endeavour and facing adversity – or simply by spending extended time together in the outdoors, irrespective of the terrain or weather.

In some cases social intercourse may be a primary motivator for outdoor recreation with physical or environmental value a distant second or third.

Cultural interaction is also a feature of outdoor recreation. People from a variety of backgrounds and nationalities meeting and interacting positively.

It is for others however an escape from people, a chance to be alone.

7. Economic.

Outdoor recreation makes a positive contribution to the economy. For example:

New Zealand's environment and the opportunity to interact with it is the major draw card for overseas visitors. While this is not about New Zealanders recreating, it is about New Zealanders benefiting from money spent by visitors to New Zealand.

Additionally, New Zealanders travelling in pursuit of outdoor recreation spend money on travel, accommodation, food, outdoor gear (e.g. bikes and clothing) and much more.

A growing number of outdoor events are also bringing money into communities.

The health benefits of outdoor recreation are significant and undoubtedly reduce the burden on New Zealand's medical system.

Some of the following points are speculative and based on anecdotal evidence. However this paper is an opportunity to 'brainstorm' a range of issues around outdoor recreation and prompt additional thinking by SPARC and other stakeholders.

Factors that maybe having an influence on outdoor recreation

1. A transient population:

Perhaps more than ever before New Zealanders are moving around New Zealand and choosing to live and work in areas that are unfamiliar to them. TIA asks if this may inhibit, at least initially, people's ability to gain maximum value from outdoor recreation. What are the outdoor opportunities and where should this information be sourced? These are just some of the questions a person new to an area must find the answers to – they simply lack local knowledge.

2. Sport:

Children appear to be playing team sports a lot earlier in life than was previously the case. From as young as 6, large numbers of children become committed to Saturday sport. While this holds many social and health benefits, it also competes with other forms of outdoor recreation.

3. Technology:

The impact of technology on our lives is immense. On one hand the ever increasing array of electronic gadgetry available for the amusement of both young and old may be competing with our desire to enjoy the outdoors. It is 'easy' entertainment and seemingly quite addictive, particularly to the young.

On the other hand, technology has opened our eyes to the outdoors and the opportunities it provides. Web based information is now part of life and opportunities locally, nationally or globally take just minutes to access.

As an aside, the meteoric rise of computers and email communication in our world has also made many of us value the outdoors more than ever before – stress levels are higher, electronic communication 'too easy'; outdoor recreation is a salve to this modern-world malaise.

4. Shift work:

Large numbers of New Zealanders work on at least one day of the weekend. Shift work generally may be a barrier for individuals or families who find their work interferes with outdoor recreation. Those involved in tourism operations over the summer months are a good example of frenzied and often erratic work patterns.

5. Parental situations:

For single parents or situations in which both parents work (often through necessity), lack of time and 'weekend fatigue' may effect their desire and ability to take on outdoor recreation.

6. Seasonal weather extremes:

With the exception of activities like skiing and hunting, winter conditions and shorter days tend to curb both the opportunity and motivation for outdoor recreation. Similarly the intense heat of summer combined with increasing public alerts about the risks of unprotected exposure to the sun may be a disincentive to play outdoors, particularly for families with young children.

7. Weekend traffic:

Increasing pressure on our roading network, particularly on the main arterial routes into and out of cities while not discouraging outdoor recreation, may encourage participation in activities closer to home i.e. the patterns of use may be changing.

8. Fuel costs and cost of living:

An increasing cost of living and in particular fuel costs may impact on some New Zealanders' ability to travel and spend money on appropriate gear etc.

9. Urban events:

Increasingly Councils are seeing the economic benefits of attracting and/or developing weekend or public holiday entertainment events; these bring vibrancy and economic benefits to the city, but may also represent competition for outdoor recreation.

10. Car security at road ends:

The Department of Conservation (DOC) is currently undertaking a car crime study. One aim of the study is to measure the risk people associate with leaving their cars at road ends when tramping or undertaking other activity. Is a conscious decision made to avoid leaving their car at the start of tracks etc? Early results suggest issues of car security may be a barrier for some people enjoying the outdoors.

11. Hut removal:

It appears that DOC has chosen to remove a number of huts around the country that did not meet certain building standards. Anecdotal evidence suggests that a number of these were still in reasonable order and fulfilling their role as shelters for those enjoying the outdoors. Some at least had regular usage and were ideal for family groups - some have been replaced, many have not. The removal of old huts may not have been in the best interest of outdoor recreation.

Maximising the value of Outdoor Recreation – a TIA view

1. Tourism, recreation and commercial recreation:

The meaning of the term 'tourism' in New Zealand is often misconstrued. Some interpret it as applying to international visitors only, for others it conjures up images of coach travel and 'volume'. Tourism is in fact international visitors *and* New Zealanders travelling to, from and within New Zealand, seeking a range of different experiences - interacting with communities, each other and the environment.

The point we want to make strongly is that using 'tourism' in the context of an outdoor recreation review may be misleading. Recreation is recreation whether it is commercially delivered or enjoyed independently. Some choose to explore and experience New Zealand without making use of commercial operators, while others prefer to pay for the experience and utilise the skill and knowledge of professional guides; both options compliment each other and add value to outdoor recreation by offering choice.

There is increasing evidence that guided tours are finding favour with New Zealanders who are seeking a well informed and safe experience. In

addition, small tightly controlled groups are likely to have far less impact on the environment.

Operators with significant industry experience are reporting increasing demand for softer back country trips e.g. clientele that prefer not to camp, carry a backpack of more than 5-6 kg and who expect to walk on well formed tracks. While it is vital that we preserve the classic backcountry experience, where fitness and self reliance are required, we also need to recognise the growing demand from international visitors and New Zealanders for the softer back country experience.

3. Concessions:

Commercial recreation carried out on public land requires a concession. TIA is currently in negotiations with DOC over the best way to allocate concessions when demand for opportunities exceeds supply. Concession terms and fee payment regimes are also being discussed.

TIA believes strongly that outdoor recreation and the environment will be the winner if concessionaires can plan confidently for the future. For this reason, we believe that tendering of opportunities already held by good performing concessionaires should be avoided. A 30 page submission detailing our reasons for this can be found at the following link:

<http://www.tianz.org.nz/Files/SB1206DOC.pdf>

Investment and operator/DOC relations are set to become the loser if tendering becomes the normal allocation process. The resultant weakening of commercial recreation activity will impact negatively on the value of outdoor recreation to New Zealanders and undermine environmental initiatives.

4. DOC/community initiatives:

Examples exist of DOC and community groups working together to establish outdoor facilities that are then made available to all New Zealanders. The Macaulay Hut in the Mackenzie Basin is one such example; this 15 bunk hut was built on public conservation land as a community trust/DOC initiative. It has proved to be very successful project with significant numbers of New Zealanders being encouraged to visit the hut and enjoy a range of outdoor recreation opportunities.

TIA believes similar joint projects could help maximise the value of outdoor recreation to New Zealanders.

5. DOC summer programmes:

In some areas DOC runs very successful summer trips that are advertised locally, focus on areas of conservation interest and target New Zealanders. TIA believes these have great educational value as well as encouraging people to not only enjoy the outdoors, but also contribute in some way to it. This follows a similar trend in international visitors who are keen to contribute in some way to the environment as part of their outdoor experience.

Summer field trips could also include 'learn to do' sessions like camp cooking, reading the weather and river crossing etc as a way of encouraging further involvement with the outdoors.

6. DOC promotion of outdoor recreation:

DOC already produces a swathe of world class information to encourage public use of conservation land. Whether this can be even better targeted and more compelling in exhorting New Zealanders to 'get out there' is not clear, but perhaps this review will give some additional guidance in this regard.

DOC's recent initiative to make huts on Great Walks free to those less than 18 years of age is applauded by TIA. It is positive action that will encourage young people to enjoy the outdoors.

7. Land Tenure:

While it is accepted that tenure review will (and has) led to greater outdoor recreation opportunities, TIA believes it is vital that public access lines are legally secured. In reality this means that walkways need to be gazetted and not subject to the whims of private owners.

8. National Park Management Plans:

It is vital that commercial recreation is seen in a positive light and plans are developed (and amended if necessary) to facilitate rather than restrict concessionaire activity. Concessionaires enhance the experience of many international visitors and New Zealanders. They provide safe, informative experiences carried out under strict environmental conditions. TIA is part of another DOC project that is seeking to further examine perceptions of recreational use on public conservation land - we look forward to bringing the results of this to the Outdoor Recreation Review.

In addition to providing recreation opportunities, concessionaires also strongly promote outdoor recreation as part of their marketing plans. This seems to sit well with the Governments desire to encourage more New Zealanders to participate.

9. More 'Great Walks':

Feedback from experienced TIA operators has indicated that there is an abundance of locations suitable for great walks. Such an initiative would attract more New Zealand families who are put off by the cost and logistics of getting down to great southern walks like the Milford Track or Routeburn.

10. Early outdoor education:

TIA supports a far greater emphasis on outdoor education in schools including its inclusion as a vital part of the curriculum for primary and secondary schools. We believe the SPARC review should investigate the impact of compliance and safety issues on outdoor school programmes. Is fear of accidents and subsequent litigation causing a drop in outdoor activity by schools?

11. Positive promotion of outdoor professionals:

New Zealanders lead the international stage in many outdoor pursuits e.g. Himalayan climbing and whitewater/ocean kayaking. For many people individual pursuits are more attractive than team sports, yet these opportunities are not well promoted – certainly in comparison to team sports for example.

Positive promotion of these slightly more fringe, but highly professional athletes would send a positive image of this type of outdoor recreation to youth and encourage participation.

12. Regional Tourism Organisation (RTO) funding:

Nearly 30 RTOs exist in New Zealand, all charged with marketing their regions to New Zealanders and international visitors. The marketing takes many forms, but the promotion of outdoor recreation is a key focus. RTOs are generally funded by council and TIA believes the importance of the RTO role should be acknowledged as part of the review along with the need for ongoing funding streams.

It is worth considering the current promotion of outdoor recreation activities by hundreds of tourism businesses nationwide as part of their individual and in some cases collective marketing efforts. While such promotion of outdoor recreation activities is clearly a business imperative, it is also very significant as we consider how to encourage greater outdoor participation.

13. Information Centres (i-SITES)

New Zealand has a recognised network of nearly 90 information centres. TIA recommends that the role these play in promoting outdoor recreation is reexamined as part of the review.

14. AA travel '101 must do's for Kiwis':

The recent AA domestic marketing campaign appears to be a successful example of motivating a significant number of New Zealanders to travel and enjoy the outdoors. TIA recommends that the Outdoor Recreation Review looks at the AA campaign and assesses whether similar Government funded initiatives could be trialed in the future to motivate more New Zealanders to participate in outdoor recreation.

15. Urban planning:

TIA believes careful urban planning will significantly contribute to increased outdoor recreation and should be a high priority for Local Government. Walkways and cycle ways, reserves and parks should be thoughtfully developed with safety, recreation and city access lines in mind. The SPARC review should examine the role of Local Government in urban planning and the value of this to outdoor recreation.

16. A range of opportunities:

Reserves and Parks within and close to urban centres are vital to maximizing the value of outdoor recreation. It is important that a range of opportunities exist e.g. short walk/playground option linking to longer running or mountain biking tracks. Otari Wilton Bush in Wellington is a very good example of an outdoor recreation opportunity within an urban setting catering to a full range of users. TIA urges the SPARC review to review some good cases like Otari Wilton Bush to inform their recommendations.

For further information please contact [Geoff Ensor](#)

Background Information on the Tourism Industry Association New Zealand (TIA)

1. The Tourism Industry Association New Zealand (TIA) advocates for the interests of the tourism industry in New Zealand. The businesses we represent generate more than 85% of New Zealand's tourism-related revenue.
2. Tourism is a \$18.6 billion industry (\$8.3b from international and \$10.3 from domestic tourism) with international tourist expenditure accounting for 19.2% of New Zealand's total export earnings.¹ The industry, directly and indirectly, employs 1 in 10 New Zealanders in a diverse range of businesses – the majority of which are small and medium sized enterprises. Not only is tourism important because of its size, representing 8.9% of New Zealand's GDP, it is:
 - Highly employment intensive;
 - Regionally disparate; and
 - Very diverse - ranging from large stock exchange listed companies to small cottage industries.
3. These businesses cover a range of tourism-related activities – hospitality, transport, adventure and activities, attractions and retail and related tourism services. In many cases, regional tourism businesses have developed around regional assets divested by other industries and have revitalized those assets and the communities that depend on them.
4. The tourism industry in New Zealand consists of more than 8,000 small and medium sized businesses. Of these businesses, most employ less than five people.
5. New Zealand welcomes more than two million overseas visitors to its shores every year. The domestic tourism industry is also important in helping to sustain a vibrant tourism industry. TIA estimates that over 75 million visitor nights are spent by New Zealanders every year.
Tourism Industry Association New Zealand (TIA) August 2007

¹ "Key Tourism Statistics – July 2007", Ministry of Tourism website

Appendix A

A Ski Industry View

Organisations:

NZ Snowsports Council – Umbrella organisation for snow sports industry
Ski Areas Association NZ – Commercial ski areas (15)
NZ Snow Industries Federation – Importers and retailers – equipment
NZ Snowsports Instructors Alliance – Qualifications and certification

Snowsports = skiing, snowboarding, cross country skiing and sliding on snow in all its recognised and safe forms

Value of Outdoor Recreation:

Snowsports motivates people to exercise in winter. Getting exercise through activities such as skiing and snowboarding can help reduce obesity, heart disease, diabetes and cancer.

Snow sports play a particularly vital role in fitness during the winter months when people tend to be less active.

Snowsports create opportunities for families and friends to spend quality time together.

Snowboarding is among the fastest growing winter sports and is extremely popular among youth.

The majority of snowsports visits occur on crown land (some in national parks). Through the concession process the snow sports industry has a long standing partnership with the Dept of Conservation (DOC). This partnership provides access to recreational opportunities and facilities; promotes the health and physical fitness of New Zealanders; public awareness and appreciation of nature and the environment; encouraging young people to benefit from participation in alpine recreation; and in enhancing the experience of newcomers to snow sports.

Snowsports are enjoyed by 7% of the population. In 2006 the industry had a record season – 1,401,400 ski area visits were recorded on 1,311 open days. Total gross turnover was \$75,500,000. Over 40,000 season passes sold prior to the 2006 season.

New Zealand facts:

15 Commercial ski areas (3 North Island, 12 South Island)
 11 Club operated ski areas (2 North Island, 9 South Island)

10 heli ski and glacier ski operators (South Island)
 3,000 seasonal employees (June – October)
 70 Ski clubs (North and South Islands)
 40 Importers and over 100 retailers (hardware and or apparel)
 Resort towns – Ohakune, Methven, Lake Tekapo, Wanaka,
 Queenstown
 1,200 people enrolled in instructor courses in 2006

Issues and opportunities:

1. Issue:

Leisure time is declining – time poverty:

Number of women in the workforce steadily increasing
 Increase in the number of hours worked per household
 Increase in hours worked is particularly notable amongst white collar workers
 Disposable income has not increased at the same rate as hours worked

2. Issue:

Baby boomers are nearing retirement age:

The industry has been too reliant on aging, middle income baby boomer skiers; skiing needed to broaden its appeal and its markets

Opportunity:

Relax the rules, embrace the growth of winter recreation in many forms, cater to youth, snowboarders and anyone else who wants to recreate in the mountains

3. Issue:

While attracting a new generation of participants, skiing still needed to retain the core baby boomer market – despite the realities of aging and increased leisure competition.

Opportunity:

Promote new wider/easier equipment (shorter carving skis), focus on mountain services and quality, and emphasise the social side and unique multi-generational, family opportunities of skiing.

4. Issue:

Significant barriers have been created to entry for new participants.

Opportunity:

Be more accepting of new participants – package components for new entrants (lessons, equipment and lifts); improve conversion rate from beginner to core (mechanisms in place to encourage their return); make lessons easier and cheaper and snow schools more accommodating; improve on mountain day care facilities (allows parents with very young children to continue participation and or learn to ski/snowboard for the first time while their children are in care at the ski area)

5. Issue:

Small ski areas including clubs are struggling due to costs of capital investment, lack of snow making, access and old lifts.

Opportunity:

Embrace new markets, focus on entry level participants, emphasise value and convenience and reward loyalty.

6. Issue:

Snow sports are perceived as being expensive for local residents and families

Opportunity:

Make snowsports better value for people who are not on a destination vacation – e.g. Pre season sales of season passes at a heavily discounted price

Information/Research

Ski Area operating statistics (1979 – 2006)

Ski Customer Satisfaction Surveys (2004 – 2006)

Economic Impact Studies:

Mt Hutt and Methven 2000

Mt Ruapehu 2002

Queenstown 2005

Equipment imports 1990 – 2006

National Discover Snow Programme research (1991 – 1996)

Recommendations:

Provide and allow flexibility so that the industry can redevelop its infrastructure to meet new market demands while still satisfying traditional visitor, local residents and environmental concerns. (Viability of many businesses offering outdoor recreation opportunities depends on how successful they are at satisfying changing market demands. This may mean changing and or redeveloping infrastructure – it's no use constraining these operations from making changes to the point where they become unviable and the opportunity is lost).

Ease and improve access to existing and new outdoor recreational opportunities

Ensure schools and tertiary institutions continue to offer outdoor recreation programmes and increase the number doing so by eliminating barriers and perceptions (too difficult and face liability issues) faced by existing and new recreation programmes offered. Some of these barriers can be eliminated if leaders in outdoor recreation have the time, easy and cost effective access to good training, knowledge of and attainment of recognised industry standards and access to professional practitioners in specialist areas.

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