

Tourism Industry Workshop on Future of Christchurch

Convened by Christchurch & Canterbury Tourism

12 July 2011

Notes from Workshop

Memorable Cities

- *Seoul* – making a public leisure space feature of a river previously hidden under the city– now a natural feature focus for walkways, bars and cafes
- *Missoula, Montana* – university city in mountainous natural setting, sophisticated & natural. Buzz – authentic local things, cafes
- *New Plymouth* – coastal walkway, city looking to sea, Len Lye art
- *Montreal, Tokyo, KYOTO, Melbourne* – interlinking cycle ways, connecting people with city
- *Budapest* – on the river, felt real vs Prague ‘Disneyland’. Taken old buildings and turned them into funky bars
- *Beijing* – Olympics forced them to upgrade/change the city though retained pockets of historical sites, cycling city. Vibrant with a mix of the historical/modern
- *Sydney* – iconic buildings

Canterbury Visitor Statistics

- Domestic vs international travellers – 50/50 in terms of nights, more in terms of revenue
- Very important portion of money coming in from outside the region – critical to sustain
- Domestic market is stronger than international in the shoulder and low seasons
- Leisure visitors by far make up the largest portion of the international market
- Segments within domestic need to be better understood
- Importance of education market to tourism as a future economic pillar
- Gateway vs destination in its own right – currently only 1/3 of international visitors specifically visit Christchurch in its own right

Domestic Visitors

- Christchurch has the 3rd largest number of domestic visitors (6% = 1.1 million visitors)
- Holiday – 2nd equal with Wellington (@ 6% of all NZ)
- Domestic market - 92% use cars, 9% air travel
- Reasons (across all NZ), what they do - 31% dine out, 27% VFR, 20% go shopping, 14% business, 4% use entertainment, 3% visit museums & galleries. Are these reasons to visit or things they do while visiting?
- Lost domestic market – Christchurch has a declining share of the under 25 year olds

International vs Domestic Markets

- Equally important
- Domestic – higher volume/lower yield
- VFR – not so appealing from accommodation perspective
- Tourism industry needs volume to recover
- International markets had higher projected growth rate than domestic prior to earthquakes – 29% growth vs 1 % growth in next 5 years.

- Our industry pricing is focused on international visitors– export pricing vs domestic
- More sensitivity from domestic audiences to safety/infrastructure?
- International markets have far more growth potential especially from eastern markets
- Short term – build facilities for locals to enjoy, giving visitors an authentic experience
- SE Asia & China will be big drivers – is what appeals to them, what appeals to locals?
- How to strike the input balance between tourist & local needs?
- City/govt funded infrastructure vs local private enterprise
- Importance of convention facilities
- Events!
- What do we mean by ‘growth’?
- Placement of facilities e.g. Convention Centre/hospitality/shopping (CBD)
- Capacity issues – domestic vs international
- Interlinking facilities – walking distance between them
- What’s our identity? What should the key word of mouth recognition be ?
- Beat trends vs go with trends

Christchurch - Gateway to the South Island

- How to protect & grow our status as a South Island gateway?
- Maintain airport at 24/7
- High speed links between city & airport creating an attractive corridor into the city
- Defining what we mean by a ‘gateway’ – sticky vs slippery
- We want to be sticky so e.g. don’t build lots of hotels near airport
- Connect airport to city
- Identity of city for young travellers – social reasons, a hub where young travellers meet
- Christchurch was getting cooler – bar & music scenes, city ‘lounge’ – entertainment/chill out
- Arrival times of international flights in the morning could encourage more people to come into the city
- Big branded hotels in the CBD
- Business tourism – Convention Centre, Town Hall
- i-SITE needs to be centrally located
- One compelling reason to stay – a hook , a ‘must see’
- Gateway that attracts key Asian markets
- Restaurants, signage for Asian markets
- We’re primarily a leisure destination
- Being stickier – a comms hub – free high speed wifi; logistics – FIT, backpackers, camper vans etc; a transport hub
- Dining precinct – including Asian
- Taking advantage of the size/compactness/precincts
- Diversity of options - all the sophistication of a city at nighttime plus easily accessible adventures/ experiences in the day time
- Understanding what we have been doing well – through consultation e.g. JTB
- Support universities – attracting young people, faculty and VFR market (parents + family)
- Hub & spoke idea from previous tourism strategy
- Arts ‘river’ precinct
- Education – visa issues, parents coming for graduation
- Singapore has turned itself from slippery to a sticky gateway
- We will need to be slippery for the next 2-3 years (due lack of accomm)
- Downtown – a walking city, food is incredibly important (especially to Asians)
- Poor public transportation connection currently – where’s the hub?

- Make it harder for airport to be a slippery destination
- Barriers to being 'sticky' e.g. perception that you need a car
- Cars vs no cars – how to manage
- Shopping & hospitality at the airport – needs restrictions so that inner city does not suffer

Market Segment Priorities

Participants in the workshop noted that our largest tourism sector is likely to remain the leisure tourism sector that currently represents around 70% of our visitor arrivals. The need to rebuild a city that caters well for this sector was confirmed and acknowledged. Participants were also asked to consider the future needs of other valuable tourism sectors which might require “special needs” in the City rebuild process. These sectors included :

- Business Tourism
- Education Tourism
- Major Events Tourism
- Sports Tourism

Business Tourism Markets (including conference, conventions, meetings and incentive market)

Rationale

- Length of stay: 5 to 6 days on average
- Yield (\$480 per night vs \$117)
- Shoulder/off peak: not as seasonal as leisure
- Convention Centre is magnet for other developments/private enterprise
- Word of mouth marketing stimulates return as leisure visitors
- Empathy factor from convention market, particularly for domestic
- Able to offer easy access and mix of experiences
- In 2010 there were 50 multi day conferences in Christchurch resulting in \$50 mill of revenue for the Convention Centre alone
- Important factor for potential hotel investors
- 3-5 year rotations of Conferences give us ongoing business opportunity

What is needed ?

- Convention Centre – Central City/Victoria Square
- Re-instatement of Town Hall with auditorium or separate auditorium in a new Convention Centre
- Walking distance to social & shopping hubs
- Near large hotels
- Bigger capacity – 3000 vs 1500 people
- Marketing – 3 year pipeline – so needs early visibility
- Beds to service Convention Centre traffic
- Quick recreation of a vibrant CBD
- Need to re-open hotels, not build new ones – sufficient capacity
- Understanding impact of interim decisions on longer term plans
- Need an early decision and blueprint
- Upgraded hotels

Education and Education Related Tourism

Rationale

Positive

- Size of existing infrastructure – quick gear up possible, low cost
- Sheer size & scope of students, VFR & Visitors
- Average spend/stay = \$10K
- Part of overall Asian growth
- Students an important part of Christchurch appeal to young people overall

Negative

- Impact on rolls of current student experiences – marketing challenge
- Hard market to get your hands on from a tourism perspective
- Issues around rises

What?

- Coordination of tourism & education marketing
- Student village/entertainment precinct – don't ghettoize, put them back at the heart
- Connectivity – wifi etc
- Marketing of safety reassurance
- Catering for Asian students from other cultures
- Type of education e.g. English language vs Asian
- Accommodation in heart of the city

Major Events Tourism

Rationale

Positive

- Potential for large numbers – can fill the city
- Marketing opportunity for Christchurch & region – halo effect
- Can be all year round – fill up shoulder/seasons
- Part of Christchurch City Council long term strategy for economic development
- Brings in people to 'trial' the City who otherwise wouldn't come
- Enduring events can deliver long term economic benefits

Negative

- High risk – requires public money to under-write
- Can be too narrow in focus
- Mismatch between capacity & utilization of major venues/assets
- Rate payer perception of how they contribute to the local economy
- Transport infrastructure requirements

What is needed ?

- Multipurpose/flexible facilities
- Decision around future of AMI – move closer to the City and cover it
- Connecting stadium to city – making the walk part of the experience
- CBS – a secondary arena

- Think beyond sport & music – art has worked well, culinary events?
- Scalable & flexible facilities – series of regular events
- Event selection is key – enhancing Christchurch overall experience
- Need a mix of hotels – current domestic focus? Need for international appeal events
- Facilities & attract events we want
- Responsibility for creating events
- Leveraging existing events e.g. Antarctic Exhibition

Sporting Events and Sports Tourism

Rationale

Positive

- Year round & multi day
- Domestic & international appeal
- Young people → food, beer, vibrant city
- Builds on existing strengths

What is needed ?

- Multi purpose all weather facility – covered stadium
- Sports precinct – linked to the City. Relocate current QE II facilities nearer the centre
- Create a purpose built Rowing course – linking Avon with estuary – rowing, dragon boating, kayaking, surf lifesaving (multi day)
- Rowing events are some of the largest (in participant terms) in New Zealand – big driver of accommodation and hospitality demand
- All types of accommodation used by sports events
- Motorsport – some existing facilities, build on those

Emerging Themes from the Whole of Workshop

- Cement South Island gateway status of Christchurch
- Avoid becoming a ‘slippery gateway’ which is easy to leave and not visit
- Provide a compact, walkable central city with linked precincts
- Acknowledge the growing importance of Asian markets
- Idea of providing a world class comms/transport/logistics hub in the centre
- Re-establishing a Convention Centre is a very high priority for the tourism sector
- Business Tourism and Education sectors also need more focus
- Clearly define the role of Council etc vs role of private enterprise in the re-build
- What will be the ‘must sees’ / hooks be ?
- Create a city centre that will attract private enterprise
- Retain and improve hotel stock
- Build to a standard that ensure visitors feel very safe with

Current Tourism Features – Things to Keep/Lose/Add

Keep

- A legacy of the earthquake – it is now part of our history
- Some heritage – Arts Centre (get it open & progress from there), Museum, Christ’s College

- Cathedral – or alternative iconic building
- Iconic architecture vs heritage
- Gothic/Victorian architecture – part of enjoying Christchurch
- Small heritage clusters – cultural aspects/experiences (3 buildings) & sympathetic development
- List of realistic ‘saves’ – focus on those
- CBD within the 4 Avenues (or smaller) – speed of decision
- Attractive paths/boulevards through the city
- Link the 3 Squares
- Attitude & spirit of Cantabrians – being good hosts, cohesive approach
- Retaining access to Port Hills, Sumner, Lyttelton – integral to Christchurch
- Convention Centre
- AMI
- Town Hall
- Sporting facilities but look at where
- Visitors Centre, near a central transportation hub
- The Square
- The Strip/The Lanes/SOL Square
- Theatre (not Town Hall)

} with nearby hotels

Because....

- Families – safe, family friendly, diversity of activities
- Younger ‘green’ market – we’re a gateway, fantastic destination
- All markets – not to be missed iconic gateway in the South Island
- International conference delegates – brand new, state of the art, sustainable, IT savvy convention space close to hotels
- Middle class Indians – diversity on your doorstep

Lose

- Buses from Square – move Bus Exchange elsewhere
- Big buildings around Square – open the Square up to sun
- Lose cinemas from Moorhouse Avenue
- Tacky market in Square
- Sense of being dangerous to be in the City at night/boy racers
- Big buses – shuttle size buses
- Hard surfaces – paving/concrete
- Car parking charges at the weekend
- McDonalds/KFC from iconic parts of the city

Add

- Footpath round the Square
- Replicate strip on other side
- Cycle/walking friendly environment
- High density residential areas in the inner city
- Jump on/jump off gold coin tram journeys – purpose: linking destinations for both locals and visitors
- Trams as people movers vs tourist attractions (San Francisco)
- Greenery – places to sit & lounge, outdoor wifi, people
- Activities in Square
- More covered space for shelter from the weather

- Move 5 star hotels
- Reputation as a cycling city
- Iconic retail & 'boutique'
- Pushing out shopping hours/making consistent
- Make re-generation visible round the barricades
- Earthquake Visitors Centre

Issues To "Park Up" in the meantime, but come back to later :

- Branding/identity – unified communications strategy & messages
- Events strategy
- Quake tourism
- Regeneration/what to do messages on wire fences – treat as a medium

Thoughts from Post It Notes

What's the most important thing we need to do?

- Get started, hurry up
- Focus on "sticky", what's needed to be kept, added or reinvigorated
- Easy city
- Create a CBD that will appeal to residents & visitors
- Create a cohesive plan for the CBD in particular but be aware of the impact for local & international markets. Happy locals equals happy tourists
- Develop a central city plan which sets a vision and dictates contact
- Create a city with 'buzz' - we will need high density residential areas in CBD, street performers, longer opening hours for restaurants & retail outlets i.e. 10am – 10pm
- Create a wow factor by cohesive design which is logical and closely located. Plenty of cafes on street & restaurants
- High amenities in the central city
- Create a vibrant CBD with hospitality, entertainment, residential & commercial accommodation, linked by leafy lanes & boulevards
- Design and build the city well
- Get residents to reside back in the CBD
- Create a vibrant diverse central city ASAP – but well thought out!
- Quickly re-build the CBD
- Infrastructural improvements, access communications, use of space
- Make the Avon River the central theme
- Rebuild and open tourist standard hotels
- Downsize the CBD
- Re-establish food & beverage providers and entertainment in the CBD
- Create a vibrant CBD – smaller, good retail, cafes/bars, green spaces
- Socialise the city – people/authentic experiences
- Create a smaller contemporary CBD built around 'people' experiences
- Build a Convention Centre that reflects Christchurch NZ. Character, early decision & opening date
- Provide certainty on when the Convention Centre will reopen/rebuild
- Build a multi use Convention Centre/Sports Complex near the Central City
- Business tourism, plan convention space and link with hotels, promote Christchurch conferences
- Recreate an appropriate Convention Centre
- Build a conference centre

- Build large, multi purpose convention/entertainment venue
- Convention Centre & auditorium in CBD
- Fast timeline for convention/sport/event centres to be rebuilt
- Build a state of the art, functional robust conference facility with a central location and supported by a range of compelling entertainment and accommodation products
- Plan & develop the convention and major event facilities to target these very measurable sectors
- Build a convention/events precinct
- Double the size of the convention centre and keep in close proximity to the CBD & hotels
- Reopen/rebuild the convention centre
- Create a walking/cycling friendly environment
- Everything in walking distance (Convention Centre, Hall, hotels, gardens etc)

What's the most important tourism segment?

- Educated wealthy tourists that influence others either by way of referral for leisure or business tourism
- FIT market
- The young 20-30 year group (networking/work) – tell 1, tell 10 x 10 x 10
- Target high value convention delegates
- High spend, high net worth individuals from South East Asia & China
- Young FIT market
- Conference visitors (business)
- Australians (because Asians will come whether you market to them or not!) – underpin successful tourism in the long run
- Business visitors
- High spend German speaking European
- International young FIT travellers – US/Asia/Europe
- International conference delegates
- Family tourism
- Malaysia FIT market
- Outdoors experiential comfort seekers
- Indian market
- Life experience tourists
- Continue to focus on growing the Australian market – massive potential for business tourism and don't forget our domestic visitors
- High end – long stay (10 days +) in NZ, active 40-60 year olds
- International convention delegates
- High spending European/English
- Affluent Chinese tourists
- Young & adventurous
- Independent travellers
- Interactive 'get out there & experience'
- High value aspirers
- Conference & Incentive convention market (MICE)
- A balanced mix of 'all market' travellers
- Young people from all markets

"You should come to Christchurch because" ...

- It's a vibrant compact and connected city offering arts, culture and outdoor spaces to take in or take on

- It's the easiest city to get around on foot or bicycle
- New City – green approach, security, adventure, no budget
- We have the most vibrant, green, relaxed, friendly, lively, relaxed, diverse & beautiful city in the world and it is so close to the most picturesque countryside and exciting adventure areas in NZ
- This is the one place in NZ that provides the most relaxing/rejuvenating experiences. Other regions have taken positions already
- It has a vibrant, authentic heart
- It has it all and everything else is close by
- Gateway to Canterbury and the South Island
- Best new river city in the world – 'green' & safe
- Everything you need and want is within walking distance
- A vibrant/exciting/food/entertainment/night life scene
- It's the one city in the world where people get to live where they play
- We have the brand new 'state of the art', sustainable, IT savvy convention space, near hotels
- We are different & safe
- A relaxed, welcoming city on the doorstep of an unforgettable South Island experience
- It provides a unique mix of outdoors and urban environment opportunities
- Diversity at your doorstep – culture/food/entertainment/scenery/activities (based around Bollywood)
- Is social, food & beverage safe, open, meeting place
- It's vibrant, exciting and unexpected
- When sorted – combining state of the art architecture with heritage Christchurch offers visitors of all ages, stages and interests with a safe, modern, savvy, sophisticated and memorable experience – the city with spunk & style. Until we are really 'sorted' – don't say too much – we don't want to overwhelm people
- To feel the heart and some of NZ and our history
- We are the greenest, safest, modern city in the Southern Hemisphere
- Boutique, high quality & friendly
- Shopping & dining
- Less-abled friendly city, access etc – covered 'market', fresh food/produce, fast food, retail, souvenir
- A sustainable connected city – modern & green
- It is easy to get around, good transport, communication, dining, accommodation, great social scene – from the arts to recreation there is plenty of activities
- You can mountain bike on extinct volcanoes, soak in the pools in the coolest alpine village, ski on the different ski fields, swim with dolphins – diverse activities – ski, swim, climb, bike, dine & shop
- Welcome to the Avon, Alps & Ocean – experience our heart & soul
- The City has great facilities
- It is a "can't be missed iconic gateway for the South Island"
- We are the coolest city in NZ

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Documented by Christchurch and Canterbury Tourism