Tourism Profile Statement

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ABBREVIATIONS USED

GDP	Gross Domestic Product
GST	Goods and Services tax
i-SITE	An information centre for visitors, part of the New Zealand network of accredited visitor centres
LTCCP	Long Term Council Community Plan
MOT	Ministry of Tourism
RTO	Regional Tourism Organisation

1. INTRODUCTION

The tourism industry has the potential to contribute significantly to the economic, social, cultural and environmental wellbeing of the District. The purpose of this statement is to identify the role that tourism is currently having and could potentially have on the development of the Waipa District.

The following sections provide a snap shot of tourism in the Waipa District, including past trends and future predictions. Opportunities for tourism development, as well as obvious roadblocks, are identified.

2. CURRENT PROFILE

This section provides an overview of the tourism activities currently occurring in (or of relevance to) Waipa.

2.1. NEW ZEALAND VISITOR INDUSTRY

In 2006 tourism contributed 8.9% of New Zealand's GDP (including both direct and indirect added value expenditure) and 13.5% of GST.

The importance of both international and domestic visitors is highlighted in the following figures. In the year 2006 there were 2.4 million international visitors (47 million nights) and 52 million domestic trips (53 million nights). This resulted in a total spend of 6.4 million for international visitors and 7.5 million for domestic visitors. By 2013 these figures are forecast to increase to nearly 3.2 million international visits (61 million nights) 55 million domestic trips (55 million nights), with a total spend of 10 million for internationals and 9 million for domestic (MOT: Tourism Satellite Account, 2008).

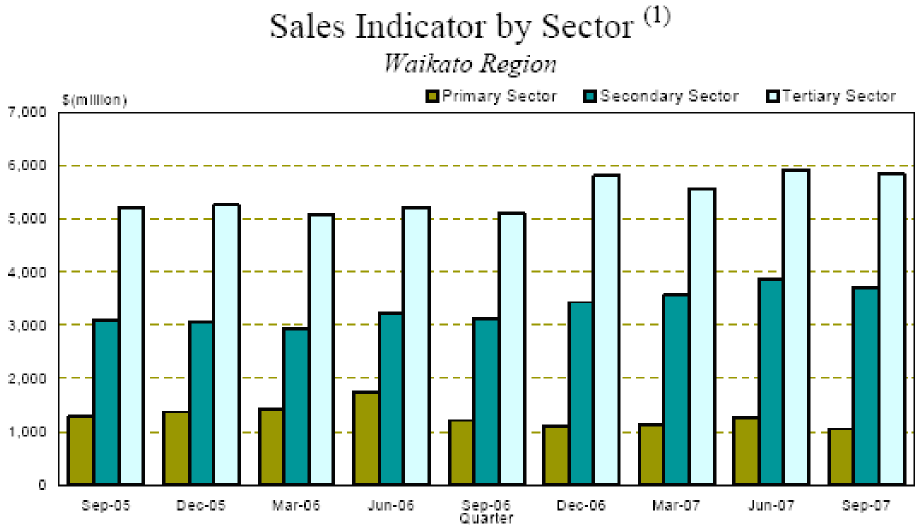
2.2. WAIKATO VISITOR INDUSTRY

In terms of assessing the importance of tourism to the Waikato economy, an indication of GDP can be taken from the total visitor spend in the region. Domestic visitors spent a total of $612.2m and international visitors $192.2m in the year 2006. This has grown from $414m and $77m in 2000 respectively, and forecast to increase to $741m and $300m in 2013 (MOT, Waikato Region Forecasts, 2007).

2.3. REGIONAL ECONOMIC INDICATORS[1]

GST can also be used as an indicator of the economic activity within Waikato region. Comparing net GST (sales less purchases) will give a better indication of the contribution of each industrial sector. While net GST is similar to GDP, it excludes some critical elements of GDP.

The total GST sales in the Waikato Region for the tertiary sector (which includes accommodation, retail, cafes and restaurants, cultural and recreational services and other services) is significant when compared with the primary and secondary sectors[2]. This has generally remained stable over the past two years and increased over the previous year.



2.4. DISTRICT EMPLOYMENT[3]

For the Waipa district, sectors that potentially employ tourism industry workers such as accommodation, cafes and restaurants and cultural and recreational services make up 8.4% of the district workforce (1250 workers), and perhaps to a lesser degree in terms of the tourism industry, retail trade, transport and storage, and personal and other services making up 20.3% (3020 workers) (refer table below).

[1] Waipa District Quarterly Review December 2007, Statistics NZ
[2] The primary sector includes 'Agriculture, Forestry and Fishing' and 'Mining' industries. The secondary sector includes 'Manufacturing', 'Electricity, Gas and Water Supply' and 'Construction' industries. The tertiary sector includes 'Wholesale Trade', 'Retail Trade', 'Accommodation, Cafes and Restaurants', 'Transport and Storage', 'Communication Services', 'Finance and Insurance', 'Education', 'Property and Business Services', 'Government Administration and Defence', 'Health and Community Services', 'Cultural and Recreational Services' and 'Personal and Other Services' industries.
[3] Waipa District Quarterly Review December 2007, Statistics NZ

Employees by Industry

Waipa District as at February 2007

Industry (ANZSIC 1-digit)		Employees	Percentage of Total
A	Agriculture, Forestry and Fishing [(1)]	2,550	17.1
B	Mining	25	0.2
C	Manufacturing	2,010	13.5
D	Electricity, Gas and Water Supply	65	0.4
E	Construction	1,190	8.0
F	Wholesale Trade	740	5.0
G	Retail Trade	1,980	13.3
H	Accommodation, Cafes and Restaurants	740	5.0
I	Transport and Storage	680	4.6
J	Communication Services	45	0.3
K	Finance and Insurance	230	1.5
L	Property and Business Services	1,170	7.9
M	Government Administration and Defence	240	1.6
N	Education	1,380	9.3
O	Health and Community Services	960	6.5
P	Cultural and Recreational Services	510	3.4
Q	Personal and Other Services	360	2.4
	TOTAL	14,880	100.0

Source: Statistics New Zealand, Business Demographic Statistics

(1) Agriculture production has been reintroduced into Business Demographic Statistics for the 2007 year.

Note: Figures have been rounded, and discrepancies may occur between sums of component items and totals. All percentages and other derivations have been calculated using rounded figures.

2.5. Waipa Tourism Businesses

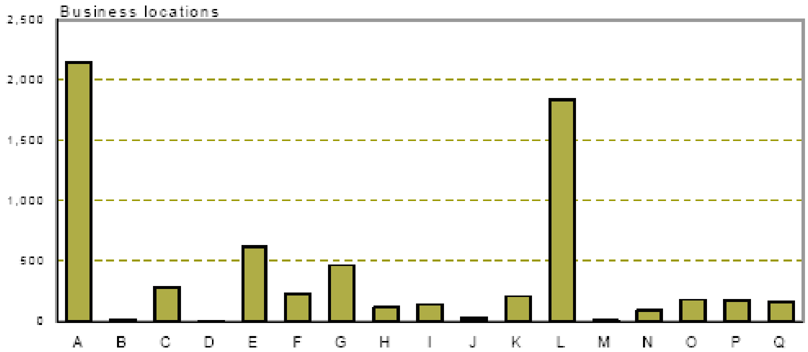
The two main town centres of Cambridge and Te Awamutu contain concentrations of the most visitor activity such as retail.

Tourism related businesses make up a relatively small percentage of the total businesses in the Waipa district (refer chart below).

Business Locations by Industry

Waipa District

As at February 2007



As stated in the table above: H = Accommodation/cafes/restaurants, P = Cultural and Recreational Services and G = Retail trade (Waipa District Quarterly Review December 2007, Statistics NZ).

2.5.1. Activities and Attractions

The Waipa District has a number of areas containing outstanding natural and physical features and landscapes including:

- Volcanic cones and steep hill country
- Wildlife habitats
- Recreational hydro-lakes
- Waikato and Waipa Rivers
- Lakes Karapiro and Arapuni
- Hamilton/ Te Awamutu Scenic Corridor
- Peat Lakes
- Indigenous forest
- Historically and culturally significant mountains of Kakepuku, Pirongia and Maungatautari.

In terms of the key attractions and activities, the following have been identified by managers of the i-SITEs and promotional groups for each area.

Cambridge / Karapiro

Cambridge and Karapiro provide some of the key tourist attractions in the district. Both have international reputations for horse breeding and training, agricultural field days and rowing. The main strengths of this area include:

- Self guided heritage trails
- Historic buildings
- Maungatautari north side access (walks)
- Events at Lake Karapiro (increasingly attracting major international events, such as the Waka Ama IVF Va'a World Sprint Championships held in March 2006 and the 2010 World Rowing Champs).
- Autumn festival and Armistice day
- Race days
- Magic Horse Show
- Stud farm tour
- Jet boating

- Kayaking
- Sculpture park/ other art galleries/ museum/ antiques
- Lake Karapiro Cruises
- Farmers market at the race course
- Short walks
- Wineries (5 in district)
- Golf courses

Te Awamutu

Situated on State Highway 3, Te Awamutu receives a lot of through-traffic of domestic and international visitors and is not really thought of as a tourist destination. Despite this there are a number of relatively small-scale attractions including:

- Te Awamutu museum (including the Finn Brothers displays)
- Rose Garden
- Museum
- Events (eg Netball)
- Rockclimbing
- Lavender farm and other gardens
- Parks and reserves (including Yarndleys bush and Kakepuku reserve)
- Racecourse

Mystery Creek/ Hamilton Airport

- Events at Mystery Creek (including sports and music events, leisure and agricultural shows, and conferences)
- Airport accommodation and conference centre

Ohaupo

A secondary destination within the district, Ohaupo provides access to:

- Clock museum and local shops/cafés
- Peat lakes
- Self guided heritage trail
- Winery

Pukeatua

- Maungatautari south side access (viewing tower and walks, proposed visitor centre and guided walks)
- Café/restaurant/accommodation/conference facility

Castle Rock/ Arapuni

- Rock climbing and corporate team building accommodation/activities
- Lake Arapuni for fishing/ boating/ water skiing

Kihikihi

Apart from the Equestrian Domain, there is very little tourism development at Kihikihi. The main attractions or activities are:

- Kihikihi Equestrian Domain (International Horse Trials, Rodeo and Polo)
- Self guided heritage trail featuring historic buildings and sites

Pirongia

This area is valued for its relaxed, rural North Island character and includes:

- Walks on Mt Pirongia
- Arts and crafts
- Cafes
- Horse treks/ATV tours
- Clydesdale horses
- Country market
- Boxing Day races

2.5.2. Major transport infrastructure

- Hamilton Airport (domestic and trans-Tasman)
- State Highway 1, 3 and 39

2.5.3. Accommodation

The number of commercial accommodation properties in the Waipa District in 1998 was approximately 25. This number fluctuated over the coming years but has grown to a reach a total of 33 businesses in the year ended March 2008. This includes the full spectrum of commercial accommodation such as camp grounds, bed and breakfasts and motels, provided they have a GST turnover of more than $30,000. The capacity of commercial accommodation properties is approximately 12,526 units per day[1] (Statistics NZ, 2008).

In total, Cambridge has approximately:

- 6 Motels
- 62 Bed and Breakfasts
- 2 Camp Grounds

Te Awamutu has approximately:

- 5 Motels
- Many B and B's (2 high quality)
- 1 Camp ground

[1] A unit of accommodation is equal to one hotel, motel or hosted room, one dorm bed or one camp site.

3. TRENDS AND GROWTH

3.1. WAIKATO REGION

Visitors to Waikato region are considerable, with a total of approximately 7 million domestic visitors (3 million nights) and 668,000 international visitors (2 million nights) in 2006. The average length of stay for international visitors (6.26) is higher than most other regions, perhaps reflecting visiting students, their visiting families, and events in the region. As the table below shows, except for domestic nights, visitor's numbers, nights, spend and length of stay have all increased since the year 2000. Forecasts to 2013 expect this growth to continue in all aspects of domestic and international visits.

	2000	2006	2013f
Domestic visitors	6,596,000	7,080,000	7,630,000
Domestic nights	3,064,000	2,999,000	3,168,000
Average nights	1.91	2.01	2.02
Total Spend	414,000	612,000	741,000
Average spend (overnight)	122,000	181,000	209,000
International visitors	331,000	668,000	884,000
International nights	928,000	2,010,000	2,597,000
Average nights	4.94	6.26	6.28
Total Spend	77,000	192,000	300,000
Average spend (overnight)	365	538	656

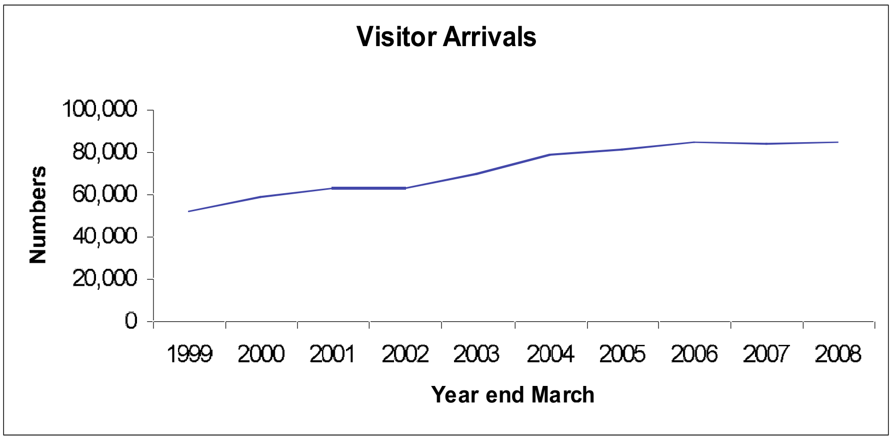
Source: MOT, 2008

Refer to Appendix 1 for further details.

3.2. Visitor Numbers and Nights in Commercial Accommodation

3.2.1. Visitor Arrivals

Overnight visitors to commercial accommodation in the Waipa District have risen slowly over the past ten years to reach a total of approximately 84,000 in the year ended March 2008.

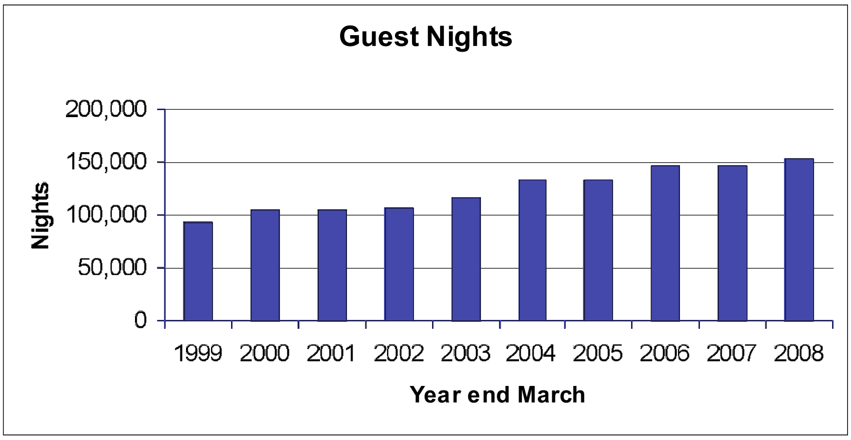


Source: Statistics New Zealand

As is the case with most other New Zealand regions, there is a definite spike in guest nights during the summer months.

3.2.2. Visitor Nights

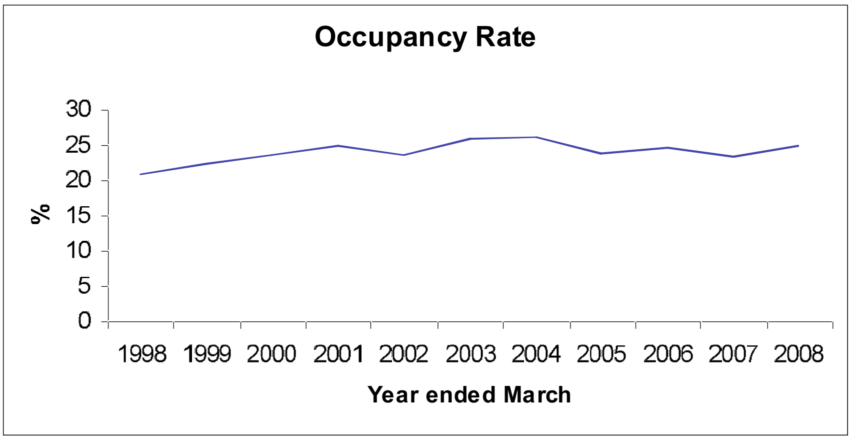
The number of visitor nights in the Waipa district has grown steadily over the past ten years to approximately 153,810 in the year ending March 2008.



Source: Statistics New Zealand

3.2.3. Occupancy rate

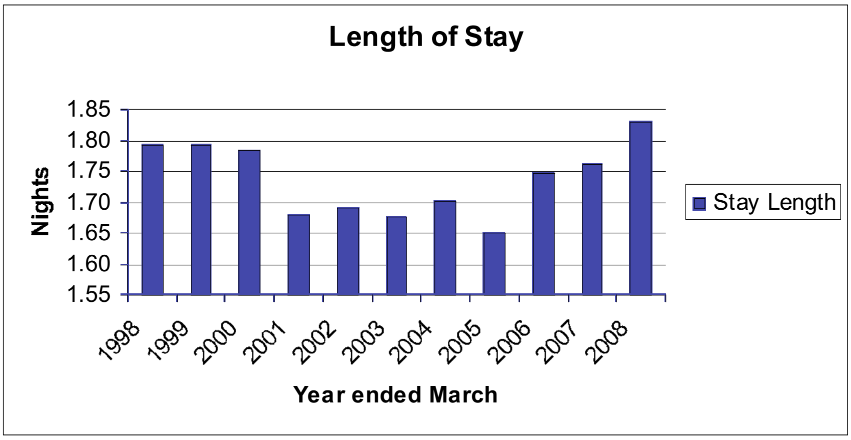
Occupancy rates in Waipa commercial accommodation has risen from approximately 21% in 1998 to a high of 26% in 2006 to 25% in the year ending March 2008 (refer below). This is lower than the national average. Motels in Cambridge and Te Awamutu reportedly have high occupancy rates.



Source: Statistics New Zealand

3.2.4. Length of Stay

The length of stay of visitors in the Waipa district has fluctuated over the years but reached a new high of 1.83 nights in 2008.



Source: Statistics New Zealand

3.2.5. Origin

The Waipa District receives a much higher percentage of domestic visitors compared to international visitors (approximately 80% and 20% respectively).

The key visitor origins domestically are Auckland, the rest of the North Island (excluding Auckland and Wellington) followed by Wellington, and to a much lesser degree the South Island (mostly Canterbury and Otago). International visitors originate mainly from Australia, the United Kingdom and Europe, and Asia and the US to a lesser degree.

3.3. VISITOR CENTRE NUMBERS

A further measure of visitors to the area, including those not necessarily staying overnight, is visitor centre figures.

Visitors to the Cambridge Visitor Centre have risen from 1,048 in 2000 to 17,488 in 2007. There was a drop in numbers from 2003 to 2006; however, since becoming an official i-SITE as part of the Visitor Information Network in 2007 numbers have started increasing again. Of these visitors, 32% are local, 38% are domestic and 30% are international.

The Te Awamutu i-SITE Visitor Centre received 16,059 visitor enquiries in 2000 growing to 24,138 in 2007.

3.4. CURRENT VISITOR FLOWS AND FORECASTS

Visitor flows data can provide an indication of the potential market as these visitors are passing through but not necessarily stopping (refer to Appendix 2 for graphed trends).

State Highway 1 north and south of Cambridge had a visitor traffic flow of approximately 11.5 million in the year 2000, a drop to 10.2 million in 2005 and forecasted to be 11.3 million in 2012. Domestic visitors make up approximately 87% and are forecast to slightly decrease over the next years, while international visitors make up about 13% and are forecast to slightly increase over the next years. Key international origins are Australia, the UK, America and Asia. Key domestic origins are Auckland and Waikato, followed by the Bay of Plenty.

State Highway 3 via Te Awamutu and Ohaupo had a visitor traffic flow of approximately 2.6 million in the year 2000, a drop to 2.4 million in 2005 and forecasted to be 2.7 million in 2012. Domestic visitors make up approximately 88% and are forecast to slightly decrease over the next years, while international visitors make up about 12% and are forecast to slightly increase over the next years. The trends remain the same for SH3 south of Te Awamutu except for domestic visitors making up a slightly lower percentage (83% versus 17%). Key international origins are Australia, the UK, America and Asia. Key domestic origins are Waikato, followed by Taranaki/Manawatu and then Bay of Plenty.

State Highway 39 north of Pirongia had a visitor traffic flow of approximately 1.4 million in the year 2000, a drop to 1.3 million in 2005 and forecasted to be 1.5 million in 2012. Domestic visitors make up approximately 77% (less compared with the other SH's in the District, possibly due to international visitors on-route to Waitomo) and are forecast to slightly decrease over the next years, while international visitors make up about 23% and are forecast to slightly increase over the next years. The trends remain the same for SH39 south of Pirongia except for domestic visitors making up an even lower percentage (74% versus 26%). Key international origins are Australia, the UK, America, Japan and Asia. Key domestic origins are Auckland (on-route to Mt Ruapehu) and Taranaki/Manawatu.

4. MANAGEMENT CONSIDERATIONS

4.1. BRANDING

The current brand tagline for the Waipa District is "Waipa – Home of Champions". Cambridge is 'town of trees and champions' and Te Awamutu is 'Rosetown'. The District is currently updating welcome signage at the 15 entrance points to better reflect the "Home of Champions" brand.

4.2. PLANS AND STRATEGIES

The Waipa District Promotion Strategy, developed by Council, is the only strategic document for the tourism sector. Its goals are to increase the well being of Waipa residents through:

- The promotion of the District as an attractive place to live, work and invest in and visit
- The strengthening of Council's role as a promotional facilitator

The key objectives of the strategy are to further develop Waipa District as a tourist destination and stopping place, market and promote the District to key markets and invest further in events. The strategy also recommended that Waipa should clarify its key selling points, recreation and tourist assets, protect those assets, and put up funding priorities based on them.

As far as can be determined, little progress has occurred on any of the key objectives or recommendations.

Apart from the Waipa District Promotion Strategy there is no comprehensive strategic or marketing plan for tourism, and hence activity is fairly reactive rather than strategic. Tourism expenditure by Council in the tourism sector is currently localised to the i-SITES, the maintenance of visitor facilities and a small amount of event sponsorship.

4.2.1. Waikato Regional Plan

The Waikato Regional Plan became operative in part on 28 September 2007 (outstanding parts subject to variation). There is no direct reference to tourism in the plan. It does however identify significant landmarks to Tainui in the Waipa area such as the Waikato and Waipa Rivers and the sacred mountains of Pirongia and Maungatautari, of which they are the kaitiaki. These landmarks are potentially the basis for future tourism activity. Consultation would be required via the resource consent process.

4.2.2. Waikato Regional Council LTCCP

The Waikato Regional Council LTCCP recognises tourism activities as a key contributor to the regional economy. A Waikato community consultation outcome under the sustainable economy section is to have a tourism industry that recognises the region's cultural and environmental heritage and values, and supports economic growth.

4.2.3. Waipa District Plan

The Waipa District Plan does not specifically refer to tourism activity. However, outstanding natural features and landscapes throughout the district that are relevant to tourism have been identified and protected from inappropriate subdivision, use and development (Part 5). These areas include:

- Volcanic cones and steep hill country (Mt Kakepuku, Mt Maungatautari, Mt Pirongia);
- Lake Karapiro and immediate environs;
- Waikato river valley scenic corridor;
- Lake Arapuni and immediate environs;
- Hamilton/ Te Awamutu SH3 scenic corridor;
- Peat Lakes.

Another tourism related activity is the Central Cambridge Character area which the plan also provides guidelines for (Part 5) along with the preservation of buildings and items of cultural or historical significance (appendix 10).

4.2.4. Waipa District Council LTCCP

The tourism sector is explicitly recognised as contributing to one of the Waikato Region's Outcomes (Sustainable Economy) and this aligns with four Waipa District Community Outcomes, including: Sustainable Waipa, Economically Secure Waipa, Vibrant and Strong Waipa and Liveable Waipa.

4.2.5. Waipa District Annual Plan

In the 2008/09 annual plan $100,000 has been allocated for district promotions (events), $15,000 towards regional tourism, $71,000 for the Cambridge visitor centre, $71,000 for Te Awamutu public relations (visitor centre), and $5,200 for the Pirongia Historical Visitors Centre.

This Plan also signals funding of $223,000 for infrastructure to support the Maungatautari Ecological Island project.

In addition to this, a new project is just underway to prepare a long term development plan for the Kihiikihi Domain which is expected to focus on the continued development of equine related events and associated facilities.

Other tourism related Council plans include the Karapiro Domain Management Plan prepared and adopted by council to develop the lakeside reserve for recreational purposes, and an upgrade of Te Awamutu including a new museum.

4.2.6. Management Plans

The majority of tourism hot spots in the district have individual management plans (Lake Karapiro, Mystery Creek, Kihikihi domain, Mt Maungatautari) that allow for existing activity. Key visitor areas such as Hamilton Airport, Mystery Creek Exhibition Zone and Lake Karapiro have dedicated land use zones to allow for specific activity. Mt Kakepuku has recently undergone a change in land use status to become a recreation reserve which will allow for activities such as mountain biking.

Future tourism related activities may fall outside the management plans and zone rules of these areas requiring a change in the zoning (such as additional structures). For example the Kihikihi domain which is currently zoned residential/ reserve.

4.3. Regional Tourism Organisation and I-SITE

The demise of Tourism Waikato as the Regional Tourism Organisation (RTO) for the Waikato has created issues in regard to the responsibility of the promotion and development of tourism.

Due to the lack of an RTO, the i-SITEs (Cambridge and Te Awamutu) are expected to take on more promotional and coordination activity than is normal practice for an i-SITE who generally only provide visitor information and booking services. There is no clarity for who is responsible for tourism in the area. There are some expectations by Waipa Council for i-SITEs to fill the gap left by the Waikato RTO, however, the funds allocated reportedly make this difficult for the i-SITEs to achieve (based on site visit and consultation, refer Appendix 3).

In terms of the boundaries of the management of visitor information within the Waipa District, the Cambridge i-SITE covers the Cambridge area, while the Te Awamutu i-SITE covers Te Awamutu, Ohaupo, Kihikihi and Pirongia. Both i-SITES are managed by independent trusts under a funding contract to Council.

4.4. Promotion Groups

The key tourism operators and i-SITES in Waikato Region (bar Hamilton) have met and are forming a group for the collaboration of initiatives. Those currently involved envisage that the group will be expanded to also include the eight councils and Hamilton City.

5. STRATEGIC OPPORTUNITIES AND CONSTRAINTS

Tourism has the potential to play an important role in the Waipa District and provide employment for people within the district's rural communities. Aside from events, tourism operations are generally small scale.

Consultation indicates that there appears to be a growing sector that sees the potential of tourism for the region. At the same time, there is a level of complacency among some accommodation providers and a lack of belief in their own region as a visitor destination.

There is potential to develop visitor services around some of the icons like Maungatautari but any feasible development would need to be small scale and sensitive to the rural environment setting. Other opportunities lie in the further development of events.

Overall the Waipa District does not have any major roadblocks that hinder tourism development. The key constraints appear to be a lack of clear planning and direction for tourism and a lack of initiatives to increase visitor numbers to the District.

Events and activities that have existing use rights under the District Plan (eg food and wine festival) may also need to be reviewed as issues may occur when, for example, an annual event changes it date from year to year.

As events grow, organisers may wish to add structures for example that fall outside of the specific management plan and zone (eg Kihikihi Domain). This would require a zone change.

Development in the foreground of Mt Maungatauri and Mt Pirongia also need to be considered so as not to detract from the natural and rural landscape, and similarly for the landscape on the banks of Lakes Karapiro and Arapuni (refer to Natural Character/ Landscape Profile Statement).

An initial investigation into the opportunities and constraints of tourism in the region identified the following opportunities and constraints.

5.1. OPPORTUNITIES

Key regional and national infrastructure provides access to the District. This provides the opportunity to deliver large amounts of visitors to Waipa. The proximity of Auckland is a major advantage worth exploring further for events, conference, weekend and other short-breaks.

5.1.1. Planned Development

- Development of a district and/or regional strategy that includes product development, infrastructure requirements that meet resident and visitor needs, branding, marketing and promotions

5.1.2. Events

- Leverage off Hamilton events and develop better links with local events (Mystery Creek, Lake Karapiro, Te Awamutu Events Centre, Equestrian events)

5.1.3. Product Development

- Further visitor services and facilities associated with the Maungatautari Scenic Reserve southern enclosure – Pukeatua (eg accommodation, cafes/restaurants, huts, additional guiding, souvenirs)
- Strengthening the rural theme through interactive experiences – farming, race - horse industry, (throughout district for farm experiences, equine stud farm related experiences at Cambridge and surrounds)
- Further developing visitor facilities at Karapiro Hydro-Electric Power Station
- Developing the historic / cultural theme – untapped tourism potential (eg. significant Maori land war sites throughout the region, Uenuku god of the rainbow, Finn brothers)
- Boutique / arts / crafts / antiques / food and wine trails based from Cambridge with trails throughout the region (eg. Greytown concept)
- Upgrading and development of quality accommodation to meet current and potential visitor needs (eg. event goers to Lake Karapiro currently utilising Hamilton accommodation, limited conference capacity)
- Vibrant town centres of Cambridge and Te Awamutu (Te Awamutu is about to undergo redevelopment of the main street)
- Additional accommodation/ visitor services at Hamilton Airport
- Mountain biking trail development on recreational reserves (eg Mt Kakepuku, perimeter of Mt Maungatautari)

5.1.4. Infrastructure and Access

- The Waipa is well serviced by transport links (road and air). Further visitor access opportunity may exist via the railway which currently passes through but does not stop in Te Awamutu (for example National Park service stop for the Overlander).
- Create awareness (eg signage) of key tourism attractions from main tourism routes (eg tourist coaches travelling from Rotorua to Waitomo via Pukeatua)
- Enhance/ develop rest stop facilities on key tourism routes for free and independent travellers and coaches (eg at Pukeatua)
- See accommodation opportunities above in product development

5.2. CONSTRAINTS

The key constraints to growing the tourism sector are detailed under five main headings:

5.2.1. Vision and Direction

- Lack of an overall vision and a development plan for the tourism sector
- Limited council interest and capability in tourism as an economic sector

5.2.2. Marketing and Promotion

- Lack of a regional RTO for marketing, promotion and product development (including inability to effectively leverage off Hamilton and Karapiro events) coupled with an industry having limited funds to partner with Council on marketing initiatives
- Overreaching expectations on the two i-SITES to market and promote the District
- Lack of a cohesive district and regional brand. No links between the positioning of Hamilton City in a visitor/tourism sense and the Waikato Region.

5.2.3. Product Development

- Lack of a tourism icon or major attraction to cluster other businesses around (eg. compared with Waitomo Caves)
- A lack of tourism experiences/products that tour companies outside of the District can promote and sell on behalf of the District
- Accommodation at full capacity at times of events (eg Netball in Te Awamutu)
- Competition with Waitomo and Hamilton for over night visitors partially due to inadequate accommodation options

- Transit signage to Te Awamutu from Hamilton and to individual attractions is limited
- Unwillingness of businesses to open in weekends

5.2.4. Land Use

- Availability of residential/commercial land for potential visitor services at Pukeatua related to Maungatautari (currently limited residential land. Special landscape character area – controlled activity) (refer to urban growth profile statement)
- Availability of residential/commercial land for potential visitor accommodation and related services at Lake Karapiro (refer to urban growth profile statement)
- Opposition of residents to expansion of existing, or development of new accommodation in rural/residential zones

5.2.5. Infrastructure and Access

- Road signage for key tourism attractions (eg Maungatautari Ecological Island Scenic Reserve) and to some extent, main towns in the District
- Mt Maungatautari North side road access (Hicks Road widening and parking facilities) to meet potential future demand
- Additional demand on water and waste services in relation to potential accommodation development including at Maungatautari/ Pukeatua (refer to water, waste and urban growth profile statements)
- Proposed Transit Cambridge bypass potentially reducing visitor numbers to Cambridge town

6. BASE CASE CONCLUSIONS

- Tourism currently provides a relatively small part of direct employment and revenue in Waipa District
- Visitor numbers and visitor nights are forecast to increase slightly over the next five years
- The actual and potential key visitor areas in the Waipa District include:
    - Mystery Creek Events Centre
    - Lake Karapiro Domain
    - Hamilton Airport
    - Mt Maungatautari and the Ecological Island
    - Mt Pirongia
    - Mt Kakepuku
    - Significant New Zealand Land War sites throughout the region (refer to Heritage profile statement)
    - Te Awamutu museum and the Finn brothers display
    - Kihikihi Domain
    - Peat Lakes
    - Towns of Cambridge (Character Area), Te Awamutu and Pirongia
    - Waikato and Waipa rivers
- There is potential to develop tourism further especially for the domestic, events and conference markets
- There is a lack of cohesive vision and plan for tourism in the district and region
- Current land zoning is sympathetic to existing and future tourism development. It is difficult to foresee all potential tourism development prospects. At this stage, other than general development constraints (refer to water, waste and urban growth profile statements) there are no roadblocks specific to tourism.
- Initial evidence suggests community willingness to further expand tourism opportunities

7. RECOMMENDATIONS FOR FURTHER WORK

- The development of a Tourism and Events Strategic Plan for the Waipa District
- Research into current demand for existing tourism attractions and events, identifying existing usage, potential demand, gaps in service, and accommodation in order to gain a comprehensive understanding of future infrastructure and service requirements

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Waipa District Council, 2003. District Promotion Strategy

APPENDIX

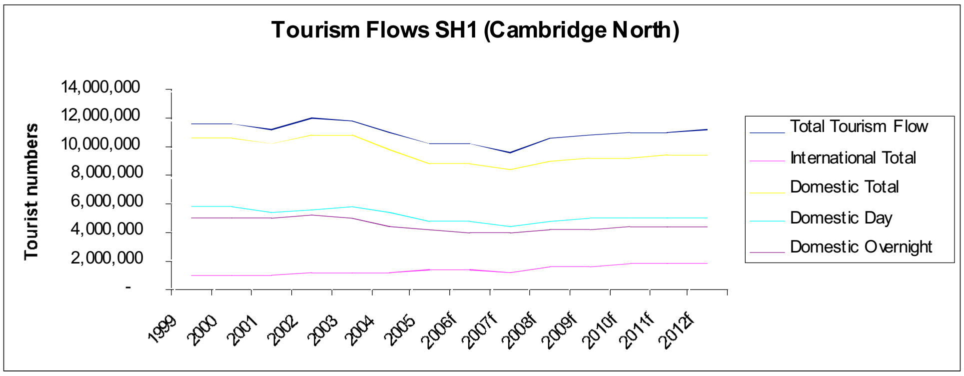
1. WAIKATO REGION VISITOR STATISTIC SUMMARY

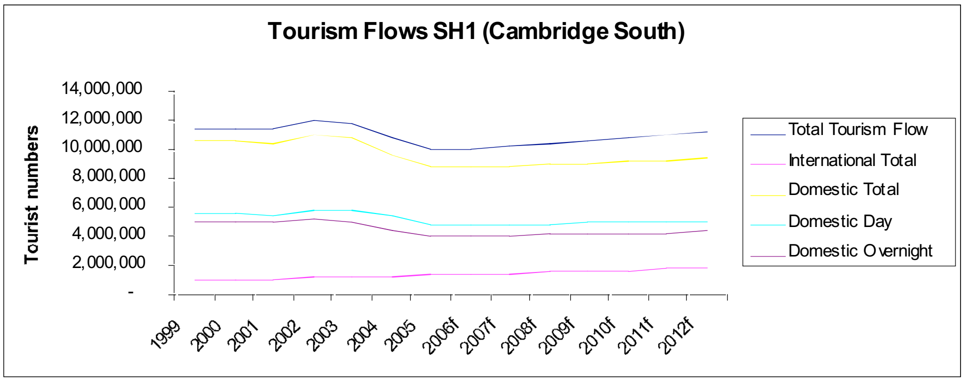
Table 1: Summary of Tourism Forecasts for Waikato RTO

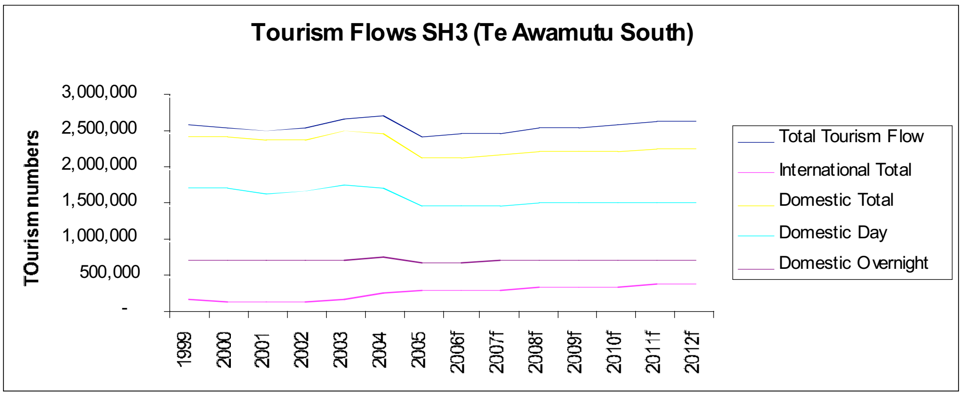
Market	Calendar Year	Overnight Visits ('000s)	Day Visits ('000s)	Total Visits ('000s)	Visitor Nights ('000s)	Average Nights per Overnight Visit	Overnight Spend ($NZm)	Day Spend ($NZm)	Total Spend ($NZm)	Average Spend per Overnight Visit	Average Spend per Day Visit ($NZ)	Average Spend per Night ($NZ)
Domestic	2000	1,606	4,990	6,596	3,064	1.91	196	218	414	122	44	64
	2001	1,762	6,150	7,912	3,403	1.93	235	286	521	133	47	69
	2002	1,778	7,793	9,571	3,330	1.87	260	469	729	146	60	78
	2003	1,467	5,518	6,985	3,127	2.13	265	376	640	180	68	85
	2004	1,529	5,068	6,597	3,260	2.13	249	334	583	163	66	76
	2005	1,325	5,957	7,282	2,495	1.88	206	337	543	155	57	83
	2006	1,489	5,591	7,080	2,999	2.01	269	343	612	181	61	90
	2007f	1,491	5,641	7,132	3,001	2.01	275	342	617	184	61	92
	2008f	1,512	5,806	7,318	3,072	2.03	287	359	646	190	62	93
	2009f	1,517	5,858	7,375	3,080	2.03	294	369	663	193	63	95
	2010f	1,528	5,910	7,438	3,100	2.03	302	380	682	197	64	97
	2011f	1,539	5,961	7,501	3,120	2.03	310	391	701	201	66	99
	2012f	1,552	6,013	7,564	3,142	2.03	318	402	720	205	67	101
	2013f	1,565	6,064	7,630	3,168	2.02	328	414	741	209	68	103
International	2000	188	144	331	928	4.94	69	9	77	365	59	74
	2001	211	125	336	1,337	6.35	126	8	134	599	61	94
	2002	213	162	375	1,312	6.15	123	10	134	579	63	94
	2003	278	232	510	1,597	5.74	148	13	161	532	55	93
	2004	325	367	691	1,725	5.31	186	20	206	573	54	108
	2005	364	390	754	1,898	5.21	161	20	181	442	52	85
	2006	321	347	668	2.010	6.26	173	20	192	538	56	86
	2007f	331	359	690	2,055	6.21	178	20	199	539	57	87
	2008f	341	373	714	2,129	6.24	191	21	212	559	58	90
	2009f	354	390	744	2,213	6.25	205	23	228	578	58	93
	2010f	367	408	775	2,300	6.26	220	24	244	599	59	96
	2011f	389	435	824	2,410	6.19	238	26	264	612	60	99
	2012f	399	449	848	2,496	6.26	253	27	281	636	61	102
	2013f	414	470	884	2,597	6.28	272	29	300	656	61	105
Total	2000	1,794	5,133	6,927	3,992	2.23	265	226	492	148	44	66
	2001	1,972	6,275	8,248	4,741	2.40	361	294	655	183	47	76
	2002	1,991	7,954	9,946	4,643	2.33	384	479	863	193	60	83
	2003	1,745	5,750	7,495	4,725	2.71	413	388	801	236	68	87
	2004	1,854	5,434	7,288	4,985	2.69	435	354	788	234	65	87
	2005	1,690	6,347	8,036	4,393	2.60	367	357	724	217	56	84
	2006	1,810	5,938	7,748	5,009	2.77	442	363	804	244	61	88
	2007f	1,822	6,000	7,822	5,056	2.78	453	363	816	249	60	90
	2008f	1,854	6,179	8,032	5,201	2.81	478	380	858	258	62	92
	2009f	1,872	6,248	8,120	5,293	2.83	499	392	891	266	63	94
	2010f	1,896	6,317	8,213	5,400	2.85	522	404	926	275	64	97
	2011f	1,928	6,397	8,325	5,529	2.87	548	417	965	284	65	99
	2012f	1,950	6,462	8,413	5,638	2.89	572	429	1,001	293	66	101
	2013f	1,979	6,534	8,513	5,764	2.91	599	442	1,041	303	68	104
Growth 2006-2013												
Domestic	Change	76	474	550	168	0.01	59	70	129	29	7	14
	Total	5.1%	8.5%	7.8%	5.6%	0.5%	21.8%	20.5%	21.0%	15.8%	11.1%	15.3%
	Annual	0.7%	1.2%	1.1%	0.8%	0.1%	2.9%	2.7%	2.8%	2.1%	1.5%	2.1%
International	Change	93	122	215	587	0.01	99	9	108	119	5	19
	Total	28.9%	35.3%	32.2%	29.2%	0.2%	57.4%	47.1%	56.3%	22.1%	8.8%	21.8%
	Annual	3.7%	4.4%	4.1%	3.7%	0.0%	6.7%	5.7%	6.6%	2.9%	1.2%	2.9%
Total	Change	169	596	765	755	0.15	158	79	237	59	7	16
	Total	9.3%	10.0%	9.9%	15.1%	5.2%	35.7%	21.9%	29.5%	24.1%	10.8%	17.9%
	Annual	1.3%	1.4%	1.4%	2.0%	0.7%	4.5%	2.9%	3.8%	3.1%	1.5%	2.4%
Share of Total												
Domestic	2006	82%	94%	91%	60%		61%	95%	76%			
	2013f	79%	93%	90%	55%		55%	93%	71%			
International	2006	18%	6%	9%	40%		39%	5%	24%			
	2013f	21%	7%	10%	45%		45%	7%	29%			

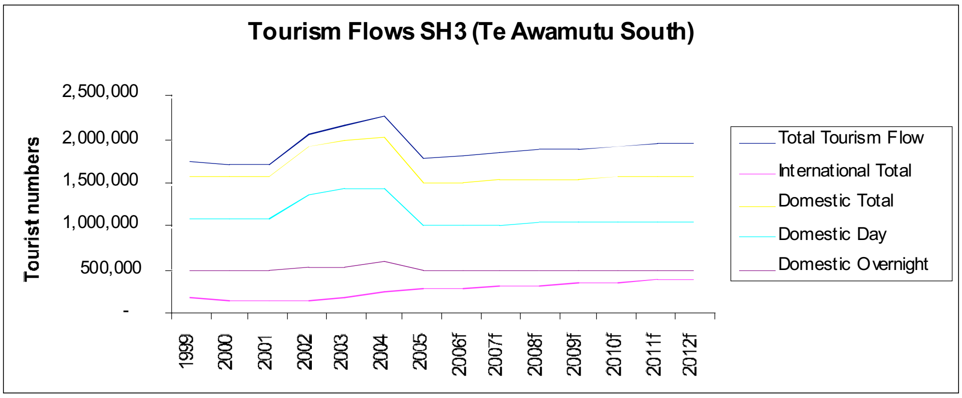
Source: Ministry of Tourism 2007

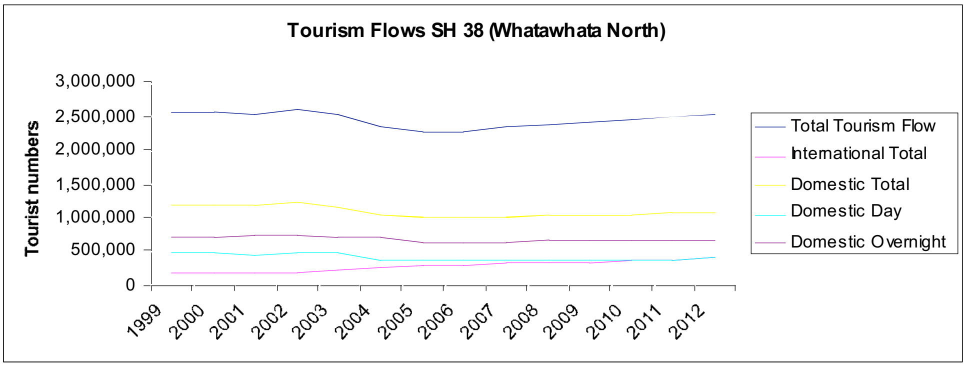
2. Waipa State Highway Visitor Flows and Forecast Trends

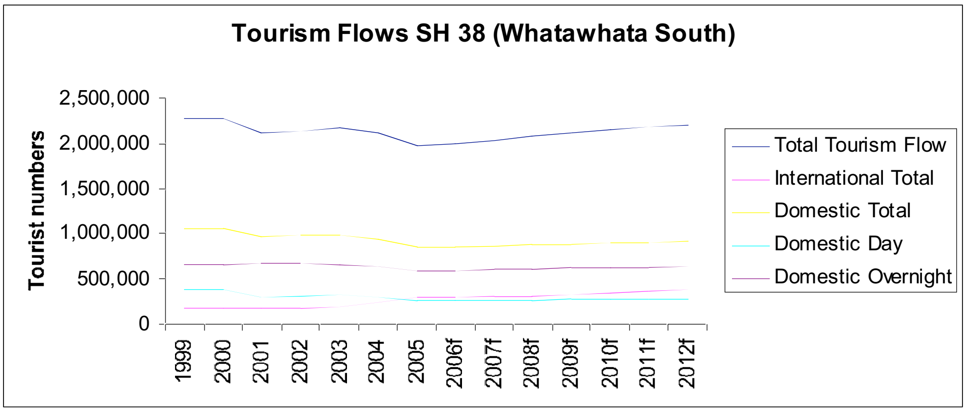












Source: Ministry of Tourism, 2005

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