

# Executive Summary

## Objectives

Colmar Brunton was commissioned by Wellington City Council who were acting on behalf of territorial local authorities across the Wellington Region (Wellington City, Hutt City, Upper Hutt City, Kapiti Coast District, Porirua City, South Wairarapa District, Carterton District and Masterton District Councils) and the Greater Wellington Regional Council.

The research was undertaken to gain an understanding of:

- the types of amenities that residents in the region view as being important to the Wellington region's identity, quality of life, economy and attractiveness to residents and visitors; and
- the level of public support across the Wellington region for regionally funded amenities (measured by whether they support the concept of collaboration between councils and to what extent residents are prepared to pay for regional amenities).

The aim of the research was to get a sense of the type of entities that residents in the region view as being regionally important. Lists of amenities generated through this research are not meant to provide a definitive list of regional amenities that should be supported by the region. This research is the first step of a wider project being conducted by the territorial authorities in the region to review the funding of regionally significant and beneficial amenities for the Wellington region.

## Methodology

This research report is based upon the results of a telephone survey of 2,000 residents across the Wellington region. A telephone survey was chosen as the main data collection methodology because it is more representative than an online survey. Compared with online surveys, telephone surveys tend to include a broader range of income groups and people from different ethnic backgrounds. The sample design for the telephone survey ensured a broad spread of views from across the region. The less populous areas within the region were deliberately over-sampled so that their views could be analysed with more robustness than is possible with a completely random survey of the region (see below for details).

### Online panel questions to identify amenities of regional importance

An online pre-survey of 630 respondents living throughout the Wellington region was conducted to develop a list of regionally important amenities that was 'resident driven' (respondents were not prompted with a list but told us what they considered to be 'regional amenities' in their own words). Respondents were recruited at random from Colmar Brunton's in-house research panel, although the sample was stratified so that it contained a minimum number within each council area. 132 respondents lived in Wellington City, 99 lived in Lower Hutt, 96 lived in Porirua, 93 lived in Kapiti, 70 lived in Upper Hutt, 53 lived in Masterton, 47 lived in South Wairarapa, and 40 lived in Carterton.

The online pre-survey is referred to in this report as the 'pre-survey'. Respondents were asked what attractions, events, facilities, venues, organisations or services in the arts/cultural, environment, recreation, economic or social areas were important for the whole Wellington region.

## Main telephone survey

The results from the online panel survey were used to inform the list of regionally important amenities for the main telephone survey. As stated above, this list was not intended to be definitive, rather it was intended to collect views on a selection of different types of amenities (including cultural, environmental and social amenities, and venues, attractions, organisations and events. The list included amenities that were identified from across the region (including those based inside and outside of Wellington City). Because there was a limit on the number of amenities that could be included in the telephone survey, the main questionnaire focused upon the objective of assessing support for a range of different *types* of amenities across these parameters. For more detail, please see the methodology section in the main body of the report.

The telephone survey was then refined through a live-trial conducted immediately prior to fieldwork for the main survey (this live-trial identified a need to cut the number of questions – we did this by removing some lower priority demographic questions).

Two versions of the telephone survey questionnaire were used, one asked a series of questions about 11 regional amenities, the other version asked the same questions, but about a different set of 11 regional amenities. The two versions of the questionnaire were created because the alternative, which would involve asking about all 22 amenities, would present a heavy burden for the respondent. This would reduce response rates which, in turn, would reduce the quality of the data.

The telephone survey generated survey data about 22 regional amenities, each with an approximate sample size of about 1,000. Other questions, not about individual amenities, have a sample size of 2,000. A sample size of 1,000 is subject to maximum margins of error of +/- 3.1% and a sample size of 2,000 is subject to maximum margins of error of +/- 2.2%.

It should also be noted that the sample can be broken down by District Council area. In total the sample was spread as follows:

- 400 interviews in Wellington City
- 329 interviews in Lower Hutt
- 210 interviews in Upper Hutt
- 241 interviews in Porirua
- 240 interviews in Kapiti Coast
- 196 interviews in Masterton
- 192 interviews in South Wairarapa
- 192 interviews in Carterton.

When data for the region, as a whole, is presented it is re-weighted so that it is regionally representative (based upon the adult population spread across the whole Wellington region), and does not over, or under, represent any one particular area.

Subgroup analysis by District Council area is included in this report, and there is a set of tables with District level results that accompany this report.

In terms of interviews achieved per ethnic grouping – we interviewed 1,776 New Zealand European respondents, 185 Māori respondents, 66 Pacific respondents, 70 Asian respondents, and 38 with an 'other' ethnicity. (Please note that people can belong to more than one ethnic group).

## Key results

Later in the Executive Summary we provide results by thematic grouping of amenities, and highlight the key findings for individual amenities. In this section below we describe some of the overall findings from the research.

### Overall findings from the research

#### Most amenities had more non-users than users

For those amenities that are available for most of the year, including venues and attractions such as Te Papa or Kapiti Island, the time-scale asked about was 'use in the past year'. For amenities that are more occasional, including events such as World of Wearable Art or the Ambulance Service, the time-scale was 'use in the past five years'. Within this report, a 'user' was someone who had used or visited that amenity within these time-scales.

Apart from Te Papa and the Westpac Stadium all other amenities had more non-users than users. Levels of use varied, from as high as 77% for Te Papa and as low as 6% for Kapiti Island. The average use level across all amenities included in the survey was 32%. (More details on levels of use can be found below).

#### People were more likely to use local amenities

Amenities were more likely to be used by residents living in the immediate council area where the amenity is based. Examples of this include:

- Respondents in Lower Hutt were more likely than average to have used the New Dowse.
- Respondents in Porirua were more likely to have used Pataka Museum and Gallery and Te Rauparaha Arena.
- Respondents in Kapiti were more likely to have used Kapiti Island.
- Respondents from the Wairarapa were more likely to have used Martinborough Fair, Wings Over Wairarapa, and Pukaha Mount Bruce wildlife centre.
- Respondents in Wellington City were more likely to have used all of the Wellington City based amenities (with the exceptions of the Rugby Sevens and the NZ Symphony Orchestra, where use was higher, but the difference was not statistically significant).

(Please refer to the main body of the report for more details on significant differences in use by location).

#### Backing for region-wide support is not always related to level of use

Both users *and* non-users often agreed that particular amenities should receive support from all of the councils in the region. For all but six of the twenty two amenities the proportion backing the idea of region-wide support was higher than the proportion of users. There are two clear examples where support for amenities was not related to levels of use. Only 6% of respondents had been to Kapiti Island in the past year and 13% had seen the NZ Symphony Orchestra – however, 54% thought that Kapiti Island should receive support from all the councils in the region and 57% thought that the NZ Symphony Orchestra should receive support from all the councils in the region.

The average amenity in the survey had a score of 42% when it came to the proportion agreeing that there should be region-wide support. This is higher than the average level of use – which was 32% (discussed above).

### Perceived benefit for the region is not always related to level of use

Respondents were asked to describe who they thought received the most benefit from each amenity. Those who said 'it benefits everyone' or 'it benefits most people in the region' were classified as answering that the amenity provided regional benefit. Levels of perceived benefit varied, from as high as 92% for Ambulance Services and as low as 23% for Te Rauparaha Arena. The average score for perceived benefit across all amenities included in the survey was 50%. Again it is worth noting that this is much higher than the average usage level of 32%, suggesting that non-users often perceive a wider benefit for the region, even though they may not use a particular amenity.

### Amenities viewed as beneficial are not automatically viewed as requiring regional support

For some amenities there are high proportions saying there is 'regional benefit', but much lower proportions saying there should be 'region-wide support'. Two examples are Wellington Botanic Gardens and Martinborough Fair. Around two-thirds said most people in the region benefited from them, but only 30% backed region-wide support for the Botanic Gardens and 16% backed region-wide support for Martinborough Fair. For these amenities most people said support should come from the local council only.

### However, amenities which have strong support for region-wide collaboration are normally perceived as providing regional benefit

Although some amenities which are viewed as regionally beneficial are also viewed as only requiring local council support (see above), amenities which have strong support for region-wide collaboration tend to always have high proportions agreeing there is regional benefit, suggesting that region-wide benefit is normally viewed as a prerequisite for region-wide support. The only exception to this is the NZ Symphony Orchestra. 57% backed the concept of region-wide support for the orchestra, whereas only 29% said that most people in the region benefited from the orchestra (most people thought it only benefited 'those with special interests').

### Views from respondents living outside the amenity's immediate council area did not differ very much from the regional results

Respondents outside the amenity's immediate council area often held similar views to respondents across the region. For example, Te Papa, Westpac Stadium, and Wellington Zoo were viewed as the top three most beneficial amenities across the region. This was still the case when removing Wellington City respondents from the analysis. (Please note Ambulance services were not included in analysis of respondents living outside the amenity's immediate council area because they are not based in one particular council area).

Views on region-wide support for amenities outside respondents' immediate council areas were also broadly similar to views across the whole region. Excluding Ambulance Services, the top three amenities (ranked by the proportion saying there should be support from all of the councils in the region) were Westpac Stadium, Te Papa and Wellington Zoo. This remained the case when excluding Wellington City respondents from the analysis.

### The majority were willing to pay to support regional amenities

Respondents were asked how much they would be willing to pay each year to financially support attractions and services that are important to the Wellington region.

One in five respondents said they were not willing to pay, with a further 4% unsure. This means that 76% of respondents were willing to pay something, with over half of them (57%) willing to pay \$25 or more per year.

### Willingness to pay varied by income

Willingness to pay varied by income, with respondents from higher income households being willing to pay more, for example, 52% of respondents with a household income of \$100,000 per year or more were willing to pay \$50 or more per year (compared with 22% of those with a household income of \$30,000 per year). However, it is worth noting that even within the lowest income bracket (up to \$30,000 per year), the majority (67%) were willing to pay something to support regionally important amenities (27% were not and a further 6% were unsure).

### Willingness to pay varied by Council area

Across the region 76% said they were willing to pay to support amenities, this proportion varied by Council area as follows:

- Wellington City – 80%.
- Lower Hutt – 76%.
- South Wairarapa – 72%.
- Kapiti Coast – 70%.
- Upper Hutt – 69%.
- Porirua – 68%.
- Masterton – 67%.
- Carterton – 62%.

### Rate-payers were generally supportive of regional amenities

Rate-payers were more likely than those who do not pay rates directly to a council to say that amenities benefited most people in the region.

Most rate-payers (73%) were also willing to pay for regional amenities through an increase in their rates (although this is slightly lower than the equivalent proportion among those who do not pay rates directly to the council, 80%).

## Thematic analysis of responses

A high-level thematic analysis was conducted in order to highlight respondent's overall views about venues, attractions, organisations and events, and to look at whether there was any difference in views across cultural, environmental and social amenities.

The results for all 22 individual amenities included in the survey were split into two themes for further analysis – the first involved grouping amenities by function (venues, attractions, organisations and events). The second theme involved grouping amenities around purpose (cultural, environmental or social). Please refer to the methodology section in the main body of the report for further details of which amenities fell into each category (see page 17).

It was not possible to provide survey data on the full range of venues, attractions, organisations, and events in the Wellington region. Nor was it possible to provide survey data on the full range of cultural, environmental and social amenities in the region (we were limited to only asking about 22 specific amenities). Therefore results from the 'groupings' are indicative only because they only reflect views about a limited number of amenities within each category.

## Use – by groupings

The 'average amenity' in this survey was used by 32% of the population. Use was higher for venue amenities (the average venue was used by 42%) and lower for organisations (the average organisation was used by 21% of the population). The scores for events (31%) and attractions (34%) were broadly in line with average use.

A similar analysis was conducted for use by 'purpose' – this analysis groups amenities into cultural, environmental or social. Use was higher for social amenities (35%) and lower for the environmental amenities included in the survey (27%). Use of cultural amenities was 33% (broadly in line with the average amenity).

It should be noted that the 'average amenity' or the 'average venue', 'average organisation' etc. is an artificial construction and is only used for thematic analysis of the survey results. Results for 'use' of specific amenities (and other questions about specific amenities) are described later in the Executive Summary.

## Perceived share of benefits – by groupings

'50%' was the average score from all amenities when it came to perceived benefit for the region. This score was higher for venues (54% for the average venue) and slightly lower for events (49%). Attractions and organisations were both in line with the average (50% each).

A similar analysis was conducted for use by 'purpose' – this analysis groups amenities into cultural, environmental or social. Social and environmental amenities scored higher when it came to perceived benefit for the region (58% and 56% respectively) but this score was lower for cultural amenities (41%). It is interesting to note that environmental amenities receive a higher 'benefit' score, despite having a low 'use' score (see above).

## Views on region-wide support – by groupings

For each amenity, respondents were asked whether all the councils in the region should support it or not. '42%' was the average score from all amenities when it came to backing region-wide support. This score was higher for organisations (55% for the average organisation) and venues (45%), but lower for events (38%) and attractions (40%).

A similar analysis was conducted for use by 'purpose' – this analysis groups amenities into cultural, environmental or social. Support was higher for social and environmental amenities (45% each) and lower for cultural amenities (38%).

Again, it is interesting to note that environmental amenities receive a higher level of backing for region-wide support, despite having a low 'use' score (see above).

The next section examines the use, perceived benefits, and backing for region-wide support for the 22 specific amenities included in the telephone survey.

## Use of specific amenities

In terms of amenities that were available for most of the year, Te Papa, Westpac Stadium and Wellington Botanic Gardens had the highest proportion of users (with 77%, 59% and 58% respectively using them in the past year), and NZ Symphony Orchestra, Pukaha Mount Bruce wildlife centre and Kapiti Island had the lowest proportions of users (with 13%, 11% and 6% respectively using them in the past year).

In terms of events (and Ambulance Services), the NZ International Arts Festival had the highest proportion of users (42% of respondents had been to see something at the NZ International Arts Festival within the past five years), and Wings Over Wairarapa had the smallest proportion of users (with 18% going at least once over the past five years).

Looking at 'use' across all amenities (either in the past year, or past five years for events) the top five most commonly used amenities were:

1. Te Papa (77% of respondents had used it recently).
2. Westpac Stadium (59%).
3. Wellington Botanic Gardens (58%).
4. TSB Arena (47%).
5. Michael Fowler Centre and the NZ International Arts Festival both had 42% of respondents classified as 'recent users'.

## Perceived share of benefits from specific amenities

Respondents were asked to describe who they thought received the most benefit from each amenity. The top five amenities (in terms of the proportion saying that they benefit 'everyone' or 'most people') were:

1. The Ambulance Service (including Wellington Free Ambulance and St John) (92% of respondents said that everyone or most people benefited from the Ambulance Service).
2. Te Papa (86%).
3. Westpac Stadium (78%).
4. Wellington Zoo (77%).
5. Wellington Botanic Gardens (66%).

Pukaha Mount Bruce wildlife centre and Kapiti Island have a relatively small proportion of users (11% had visited Pukaha Mount Bruce wildlife centre in the past year, and 6% had visited Kapiti Island), however they have relatively high proportions saying they benefit everyone, or most people - 40% and 46% respectively. There are amenities that have much lower proportions than this, such as Downstage Theatre, New Dowse and Te Rauparaha Arena, which had the lowest proportions saying they benefited everyone or most people (28%, 27% and 23% respectively).

## Region-wide support for specific amenities

Over half of respondents agreed that the following amenities should receive support from all the councils in the region:

- Ambulance Services (87% said this should receive region-wide support).
- Westpac Stadium (75%).
- Te Papa (69%).
- Wellington Zoo (65%).
- NZ Symphony Orchestra (57%).
- Rugby Sevens (54%).
- Kapiti Island (54%).
- The NZ International Arts Festival (52%).

It should be noted that Westpac Stadium already receives regional funding. The NZ International Arts Festival receives core funding from Wellington City Council and received project funding from Porirua City, Hutt City, Upper Hutt, Kapiti Coast District and councils in the Wairarapa.

For other amenities in the survey, less than half of respondents backed the idea of region-wide support. Some amenities received low levels of backing for region-wide support, these include: Downstage Theatre (20%), New Dowse (17%) and the Martinborough Fair (16%).

Levels of backing for region-wide support is not always related to levels of use. For example, only 6% had been to Kapiti Island in the past year and 13% had seen the NZ Symphony Orchestra in the past year (although over half supported the idea of region-wide support for these two amenities).

Views from respondents living outside the amenity's immediate council area did not differ very much from the results listed above. Over half of respondents living outside the amenity's immediate council area thought the following amenities should receive support from all the councils in the area:

- Westpac Stadium (71% of respondents living outside Wellington City thought this should receive support from all the councils in the region).
- Te Papa (69% of respondents living outside Wellington City thought this should receive region-wide support).
- Wellington Zoo (60% of respondents living outside Wellington City thought this should receive region-wide support).
- Kapiti Island (54% of respondents living outside Kapiti thought this should receive region-wide support).
- NZ Symphony Orchestra (54% of respondents living outside Wellington City thought this should receive region-wide support).
- Rugby Sevens (51% of respondents living outside Wellington City thought this should receive region-wide support).

47% of respondents living outside Wellington City thought the NZ International Arts Festival should receive region-wide support. The equivalent figure was lower for all other amenities.

(Ambulance Services was not included in this analysis because they do not operate in one council area).

## Summary table – showing key scores for each individual amenity

The table overleaf summarises the key scores for each amenity. Rather than present three separate tables, the three key pieces of data for each amenity are presented side-by-side to assist quick reference.

The first column is the proportion of all respondents across the region who thought that amenity should receive region-wide support. The table is ranked by this important variable.

The second column is the proportion who thought everyone, or most, people benefited from that amenity (as noted above, some amenities, such as Martinborough Fair are viewed as beneficial, but this does not necessarily mean people back region-wide support for that amenity).

The third column is the proportion who had used that amenity recently, in the case of amenities that were open for most of the year this was 'used in the past year' and for amenities that were events (and the Ambulance Services) this was 'used in the past five years'. As noted above, level of use is not always related to perceived benefit nor backing for region-wide support.

Here are examples of how to read the first two rows of the table are below:

- 87% backed the idea of region-wide support for Ambulance Services, 92% thought that Ambulance Services benefited most people in the region, and 31% of respondents had used Ambulance Services recently (as discussed above, recent use of Ambulance Services was classified as 'used in the past five years' but for other amenities, apart from events, this was classified as 'used in the past year').
- For Westpac Stadium, 75% backed the idea of region-wide support for the amenity, 78% thought that most people in the region benefited from it, and 59% had used the Westpac Stadium in the past year.

| Amenity                            | % backing region-wide support | % thinking everyone or most people in the region benefit | % used recently |
|------------------------------------|-------------------------------|--|-----------------|
| Ambulance Services                 | 87                            | 92   | 31              |
| Westpac Stadium                    | 75                            | 78   | 59              |
| Te Papa                            | 69                            | 86   | 77              |
| Wellington Zoo                     | 65                            | 77   | 36              |
| NZ Symphony Orchestra              | 57                            | 29   | 13              |
| Rugby Sevens                       | 54                            | 61   | 29              |
| Kapiti Island                      | 54                            | 46   | 6               |
| The NZ International Arts Festival | 52                            | 46   | 42              |
| TSB Arena                          | 47                            | 64   | 47              |
| World of Wearable Art              | 44                            | 46   | 28              |
| Zealandia                          | 40                            | 51   | 26              |
| Pukaha Mount Bruce Wildlife Centre | 38                            | 40   | 11              |
| Michael Fowler Centre              | 37                            | 52   | 42              |
| Wellington Museum of City and Sea  | 33                            | 49   | 28              |
| Wellington Botanic Gardens         | 30                            | 66   | 58              |
| Pataka Museum and Gallery          | 25                            | 29   | 27              |
| Wellington City Gallery            | 25                            | 30   | 35              |
| Wings Over Wairarapa               | 23                            | 34   | 18              |
| Te Rauparaha Arena                 | 20                            | 23   | 18              |
| Downstage                          | 20                            | 28   | 20              |
| New Dowse                          | 17                            | 27   | 31              |
| Martinborough Fair                 | 16                            | 56   | 39              |