

ROTORUA PERCEPTION SURVEY 2006

PREPARED BY

APR CONSULTANTS

FOR

ROTORUA DISTRICT COUNCIL

NOVEMBER 2006



EXECUTIVE SUMMARY

When the perception survey of Rotorua was undertaken in 1996 the town was perceived as a tourism and forestry centre that had problems with unemployment and crime and had a high proportion of Maori. In the ten years since that survey the perceptions of Rotorua have changed from these few generalisations to a show greater understanding of the multi-faceted nature of this growing city.

The perception survey of 2006 indicates that Rotorua is seen as a place of the great outdoors with impressive lakes, scenery and geothermal activity. It is also seen as a place of entertainment, activities and events and an excellent location to live in that provides a good work/life balance. There are some positive perceptions of Rotorua as a good place to set up and do business with strong business support networks although there is still some room for improvement in this area. While Rotorua is still perceived as a tourist destination, this is clearly not the only perception people have of Rotorua. Tourism in Rotorua is now seen as an excellent 'industry' that is part of the fabric of a multi-faceted city with much more to offer.

There do remain some negative perceptions of Rotorua in 2006 that were evident in the 1996 perception survey. These include negative perceptions of crime and safety, career progression, employment opportunities, tertiary education and media profiling. There were no conclusive negative perceptions in the 2006 perception survey that had not already been identified in the 1996 survey except for those of legislation and compliance and the labour force. However, there were suggestions for improvements to Rotorua that included improving Rotorua's negative image, improvements to the town area, improvements for youth, infrastructural improvements and an increase in personal contacts for businesses from their local economic development unit and current Rotorua investors. The literature review indicated that a greater focus is required to provide for the needs of the domestic visitor market who visit Rotorua as a short break destination.

When analysing particular survey groups there were some differences in perceptions about aspects of Rotorua including youth who thought positively about early childhood, primary and secondary education where as all other survey groups had average or negative perceptions of this education. The majority of businesses had an average to positive perception to wage rates in Rotorua but the majority of other groups surveyed had an average or negative perception about wage rates. Only business respondents had a positive net rating of housing in Rotorua but most groups gave housing only an average rating at best. Nearly 20% of immigrants rated housing as poor and nearly half of the visitors surveyed did not know about housing in Rotorua. Cultural facilities, sport facilities and proximity to amenities all received net positive responses by all respondent groups.

It is clear from the survey results that Rotorua has improved the understanding of what it can provide to those who live within the city, live within the region and those who visit Rotorua. However, apart from the excellent image of the tourist industry, the great outdoors and the community spirit many of the aspects surveyed of the city rated as average and some had net positive ratings of less than 50%. To improve the image of Rotorua will now require another lift in perceptions from average to extremely positive or excellent in key areas. This will require a targeted marketing strategy and branding that points out the competitive advantages of Rotorua in relation to other cities and suggests how to sell those advantages to the local, domestic and international markets.

TABLE OF CONTENTS

EXECUTIVE SUMMARY	ii
SECTION 1: INTRODUCTION & BACKGROUND INFORMATION	5
1.0 INTRODUCTION.....	5
2.0 METHODOLOGY.....	6
2.1 Phase 1 Objectives	6
2.2 Process	6
3.0 LITERATURE REVIEW	8
3.1 Introduction.....	8
3.2 Desktop Exercise	8
3.3 Key points from the literature review:	15
4.0 ROTORUA PERCEPTIONS SURVEY REPORT 1996.....	16
4.1 Strengths	16
4.2 Weaknesses.....	16
4.3 Opportunities	17
4.4 Threats	18
5.0 BRIGHT ECONOMY GROWTH OPPORTUNITIES FORUM	19
5.1 Key points from the Bright Economy Forum:.....	22
5.1.1 To overcome business investment and staff recruitment issues.....	22
5.1.2 Top three negative perceptions of Rotorua as a place to live, work and learn.....	22
5.1.3 Top three negative perceptions of Rotorua as a place to invest and do business.....	22
5.1.4 Top three positive perceptions of Rotorua as a place to live, work and learn.....	23
5.1.5 Top three positive perceptions of Rotorua as a place to invest and do business	23
SECTION 2: LIVE, WORK & LEARN SURVEY RESULTS	24
6.0 TELEPHONE SURVEY.....	24
6.1 Key points from the telephone survey – live, work and learn:	31
7.0 ONLINE SURVEY	32
7.1 Key points from the online survey – live, work and learn:	59
8.0 FACE TO FACE SURVEY	60
8.1 Key points from the face to face survey – live, work and learn:	64
9.0 IMMIGRANTS TO ROTORUA SURVEY	65
10.0 YOUTH SURVEY	84
10.1 KEY POINTS FROM THE YOUTH SURVEY	102
SECTION 3: INVEST, SET UP & DO BUSINESS SURVEY RESULTS	103
11.0 TELEPHONE SURVEY.....	103
11.1 Key points from the telephone survey – live, work and learn:	123

12.0	ONLINE SURVEY	124
12.1	Key points from the online survey – invest, set up and do business:.....	135
13.0	Comparison between the 1996 perception survey and the 2006 perception survey	
	136	
	CONCLUSION	138
	APPENDIX ONE: SURVEY FORMS	144

SECTION 1: INTRODUCTION & BACKGROUND INFORMATION

1.0 INTRODUCTION

This report has been prepared by APR Consultants for the Economic Development Unit for Rotorua District Council (RDC). This report outlines the results of research undertaken between August and September 2006 into the perceptions that target markets have of Rotorua as a place to live, work, learn, invest and do business. This report is the outcome of Phase 1 of an overall project to prepare a marketing strategy as a result of this research.

The overall objectives of the project are to:

Phase 1:

- Undertake surveys to understand the perceptions of specific groups of Rotorua District with regard to Rotorua as a place to live, work, learn and/or invest and set-up business. Data was gathered from the Bright Economy Rotorua Economic Growth Forum, 200 telephone surveys with locals and domestic markets, 105 live, work and learn surveys, surveys with 80 immigrants to Rotorua, 60 youth and student surveys, 106 telephone surveys (Invest, Set Up and Do Business) and 15 online surveys (Invest, Set Up and Do Business). A literature review was also undertaken to gather secondary data related to people's perceptions of Rotorua. The review also includes an extract from the '1996 Rotorua Perceptions Report' outlining the strengths, weaknesses, opportunities and threats of Rotorua as perceived by focus group participants.

Phase 2:

- Develop a marketing strategy based on the information gained from Phase 1, to increase the number of people seeking to develop businesses, invest in or relocate to Rotorua District.

2.0 METHODOLOGY

2.1 Phase 1 Objectives

Phase 1 – Perception Survey

The objectives of the perception survey are to:

- Better understand the perceptions, physical and soft barriers of Rotorua as a place to live, work, learn, invest and do business;
- Identify what is required to assist in shifting these perceptions by turning them into positives and/or removing some of the barriers; and
- Provide input from the perception study into the unique value propositions for the Rotorua Live, Work, Learn, Invest and Do Business Marketing Strategy.

2.2 Process

Phase 1 – Perception Survey

Survey Design and Implementation

The survey forms were designed incorporating a mixture of both qualitative and quantitative questions. There were four different survey forms:

- A 'live, work and learn' survey for the general public (including youth).
- An 'invest and set up/do business' survey for businesses and venture capitalists.
- A face to face survey for international visitors while in Rotorua.
- A survey for immigrants in Rotorua based on the 'live, work and learn survey form.

A copy of the survey forms used for the data collection process is provided in [Appendix 1](#).

Interviewers would be fully briefed on the content and purpose of the survey and would attend a briefing to familiarise themselves with the questionnaire and with the processes to be followed in terms of coding, call-backs, survey prompts and other factors related to effective implementation of the survey programme.

Surveys took between 7-15 minutes depending on each respondent and included various qualifiers (eg, minimum age requirements) and restrictions (eg, the time of day or evening for calling respondents). Interviewers ensured respondents of confidentiality and would give respondents APR's free-phone number to ring if they had any questions relating to the research. The survey was administered at varying times throughout the day and up to three call-backs were made in order to mitigate non-response bias.

Data Processing and Analysis

The survey data collected was entered into several purpose built MS Excel database(s). The APR team analysed the qualitative and quantitative data collected and generated any tables and graphs required to complete the outcomes of the project. These tables include frequencies and percentages from the data. Where appropriate, qualitative data has been aggregated into appropriate categories and frequency tables generated accordingly, allowing for easy identification of key issues. Specific cross tabulation requirements (ie, results by ethnicity, age or gender) have been identified and are included in the results.

The following are the identified outcomes for Phase 1 – Perception Survey:

1. A report providing information on the perceptions of Rotorua by target market groups in both a full form and a one page overview. It is expected that the report will be graphical and visually appealing as well as having an in-depth commentary.
2. The Perception Survey would be specifically crafted to ascertain both negative and positive market perceptions of this district. An analysis of any barriers and perceptions of Rotorua ascertained from the research would be presented, as well as suggestions to remove these barriers in order to change perceptions.

Where to next?

This report will inform the marketing strategy to be developed in October – November 2006.

3.0 LITERATURE REVIEW

3.1 Introduction

This literature review presents information from a desktop exercise analysing online newspaper and journal articles. The review also includes an extract from the '1996 Rotorua Perceptions Report' outlining the strengths, weaknesses, opportunities and threats of Rotorua as perceived by focus group participants.

This literature review is part of an overall project to develop a marketing strategy for Rotorua. The strategy aims to develop tools to encourage people to live, work, learn, invest and do/set-up business in Rotorua.

3.2 Desktop Exercise

A desktop exercise was undertaken to gather secondary data related to people's perceptions of Rotorua. The articles and information listed below include newspaper articles from the New Zealand Herald, the Rotorua Daily Post and other research journal websites. The tables outline the name and author of the article, where it can be found, a short description of its contents and an overall rating of whether it conveyed a positive or a negative perception of Rotorua.

Title / Author	<i>"Maori-Based Tourism in Rotorua: Perceptions of Place by Domestic Visitors"</i> . By S. Pike and C. Ryan.
Source	http://www.multilingual-matters.net/jost/011/0307/jost0110307.pdf
Abstract	This paper reports findings from a survey of 763 Auckland residents. The research examined attitudes towards the resort town of Rotorua as a short-break destination with specific reference to the role that Maori culture plays in the formation of perceptions of Rotorua. The Te Arawa Maori people have been closely associated with tourism for over 140 years and this is recognised by the domestic market for Auckland/domestic visitors. However, the Maori component of Rotorua is found not to be an attraction. Rather, tourists are drawn to other facets of the product. While this is evidence for the fact that Rotorua is a multi-use product in tourism, given the role that travel is supposed to play in bridging gaps between cultures, tourism seems to be failing in this respect. It is suggested that an emphasis upon 'traditional authenticities' aimed at certain overseas segments misses the contemporary vibrant nature of Maori music and dance performance that might in fact have a wider appeal, including the domestic tourism market.
Perception of Rotorua	Positive for Rotorua. Negative for Maori Tourism.

Title / Author	“Visitors to Rotorua: Characteristics, Activities and Decision-Making”. By K. Moore, J.R. Fairweather, and D.G. Simmons.
Source	http://www.tourismresearch.govt.nz/Bibliography/ViewResearchItem.aspx?ID=1145
Abstract	This report presents results from two surveys of visitors to Rotorua, New Zealand, which investigated visitors' general demographic characteristics and their decision-making processes (when decisions were made and itineraries planned, what influenced those decisions and purpose of travel). The literature on visitors to Rotorua is relatively extensive given its position of one of the top visitor destinations in New Zealand. This literature is reviewed to provide a base for interpretation of this study's findings. The large body of literature on visitor decision-making is also briefly reviewed. Emphasis is placed on the role of information in the production of destination 'images' and in the overall decision-making process. The affective and family context components of decision-making are also considered as these are thought to be particularly relevant to leisure travel, which is often carried out in a social context. The first structured questionnaire (Rotorua Visitors Questionnaire) examined visitors' characteristics (origins, age, group size, length of stay, attractions visited, accommodation type, transportation type, etc.). The second (Rotorua Visitor Flows and Decision-Making Questionnaire) investigated decision-making. For both surveys, 'Rotorua' has been defined as the boundaries of the Rotorua District Council. Both surveys were conducted in as close an approximation to a random sample as possible. A different range of sampling sites was used, however, for each. The first questionnaire was administered predominantly on the Rotorua lakefront while the second involved sampling at a range of attractions within the city and in the region/s periphery. From the 'Visitors to Rotorua Questionnaire' it was found that visitors were predominantly domestic in origin (57.3%), travelled as a family or as couples for the purpose of holiday or leisure, stayed for one to three days (two thirds of visitors stayed overnight), used a variety of accommodation, but primarily motels, with almost two thirds travelling by private car or van. The major distinction was between domestic and international visitors. International visitors are more highly represented in both the younger and older age categories than are domestic visitors who are dominated by the middle-aged. Domestic visitors were overwhelmingly reliant on private vehicles for transport whereas two thirds of international visitors used hire vehicles. While thermal attractions are the most significant attraction for visitors as a whole (almost a third mention this as the primary attraction), domestic visitors are more attracted by the general activities and the natural environment of the area than they are by thermal attractions. Thermal attractions are, to some extent, primarily for international visitors.
Perception of Rotorua	Positive.

Title / Author	<i>"Perceptions of Crime in the Neighbourhood"</i> . (Author unknown).
Source	http://www.justice.govt.nz/pubs/reports/2005/burglary/survey-household-part-one/chapter-3.html
Abstract	This is a report of the perceptions of crime in New Zealand towns (including Rotorua).
Perception of Rotorua	Negative.

Title / Author	<i>"Mountain biking world descends on Rotorua"</i> . By J. Rowan.
Source	www.nzherald.co.nz
Abstract	Mountain bikers are flooding into Rotorua for the biggest event the tourist city has hosted - the World Mountain Bike Championships. Rotorua Mayor Kevin Winters says that in terms of spectator numbers, media presence and economic impact for his city, it dwarfs last year's British and Irish Lions rugby tour. The weather has been on their side this week, drying out the four courses: downhill, cross-country, four-cross (where four riders ride abreast down a 500m course in less than a minute) and the trials course, which has obstacles. "The courses are looking absolutely brilliant," said site director Dean Watson.
Perception of Rotorua	Positive.

Title / Author	<i>"Police jailer accused of passing drugs between prisoners"</i> . (Author unknown).
Source	www.dailypost.co.nz
Abstract	A Rotorua police jailer is under investigation for allegedly passing drugs and a mobile phone from one prisoner to another [at the local police cells]. The <i>Daily Post</i> understands the female jailer was nabbed after police set up an undercover sting in prison cells. Bay of Plenty crime manager Detective Inspector Garth Bryan has confirmed an investigation is on but refused to go into details about how the matter came to light. He said the jailer had been stood down while a criminal investigation and an employment-related investigation were carried out.
Perception of Rotorua	Negative.

Title / Author	<i>"Rotorua's mane attraction"</i> . By M. Crawshaw.
Source	www.nzherald.co.nz
Abstract	Exciting is one word to describe being locked in a cage with a pacing lion cub. Terrified is another. Getting up close and personal with cubs is one of the drawcards at Paradise Valley Springs, a wildlife sanctuary set in 20ha of native bush about 20 minutes from Rotorua. It's an amazing experience. But it may take the edge off any future trip to the zoo, because watching lions from a distance doesn't seem nearly as interesting in comparison.
Perception of Rotorua	Positive.

Title / Author	<i>"Moko Halloween tattoo pulled from US webstore"</i> . (Author unknown).
Source	www.nzherald.co.nz
Abstract	A fake Maori moko tattoo being sold on an American halloween website appears to have been pulled from the website after complaints from [Rotorua] Maori it was insulting.
Perception of Rotorua	Positive/Negative (depending on point of view).

Title / Author	<i>"Businesses see energy options in bio-materials"</i> . By J. Rowan.
Source	www.nzherald.co.nz
Abstract	While the rest of the world laments rising oil prices, Rotorua business leaders hope to turn the trend to their advantage. The key to doing this, they say, is turning their area into a hub for the growing global industry of bio-materials - plant-based fuels and plastics that leave "low-energy footprints" because they are made from renewable resources. The concept was outlined at an economic growth forum organised by Rotorua's Bright Economy Advisory Board yesterday.
Perception of Rotorua	Positive.

Title / Author	<i>"Get-tough cop's clean-up mission"</i> . By P. Gower.
Source	www.nzherald.co.nz
Abstract	Mr Horne and the Rotorua Police are still on a mission. This week he was the driving force behind an officer's idea to get the Rotorua District Council to give police the power to issue trespass notices to people with five or more dishonesty convictions who enter the Central Business District. The Council voted in favour and is awaiting legal advice before implementing it, with the Council for Civil Liberties and defense lawyers already lined up in vocal opposition. Mr Horne is relaxed about the outcry; he believes the trespass order "is quite conservative". He describes himself as a police officer passionate about making the community safer.
Perception of Rotorua	Positive/negative (depending on point of view).

Title / Author	<i>“Events centre so impressive it’s already booked”.</i> By R. Devine.
Source	www.dailypost.co.nz
Abstract	Rotorua’s giant new events centre is still in the construction stage, but so far 36 events have been booked for the centre next year, with more than 130,000 people expected to attend. The events, which include dinners and conferences, are scheduled to take place between February and November, and there are more bookings in the pipeline.
Perception of Rotorua	Positive.

Title / Author	<i>“Visitors’ and locals’ experiences of Rotorua, New Zealand: an interpretative study using photographs of landscapes and ‘Q’ method”.</i> By J.R. Fairweather and S.R. Swaffield.
Source	http://www.tourismresearch.govt.nz/Bibliography/ViewResearchItem.aspx?ID=403
Abstract	This paper reports on an interpretative study of locals' and visitors' experiences in Rotorua, New Zealand and shows how experiences vary among different groups. Photographs were ‘Q’ sorted by a non-random sample of locals and both overseas and New Zealand visitors, and the data were factor-analysed to identify four factors or types of experience. These include experiences of Sublime Nature, Iconic Tourism, New Zealand Family and the Picturesque Landscape. These findings show that Q sort with photographs is a useful research approach which advances understanding of destination image and provides results that have implications for the contemporary theoretical debate on the nature of tourist experience in New Zealand. Copyright © 2002 John Wiley & Sons, Ltd.
Perception of Rotorua	Positive.

Title / Author	<i>"World mountain bikers lavish praise on Rotorua"</i> By J. Rowan.
Source	www.nzherald.co.nz
Abstract	The organisers of the world mountain bike championships in Rotorua are hailing the event as a success after about 40,000 spectators packed the courses at Mt Ngongotaha to watch the last three days of racing.
Perception of Rotorua	Positive.

Title / Author	<i>"Rotorua Yens for Japanese"</i> (Author unknown).
Source	www.nzherald.co.nz
Abstract	Tourism leaders are looking at ways of attracting Japanese tourists back to Rotorua. Nationally, Japanese tourist numbers are down by about ten per cent. However, Destination Rotorua tourism marketing general manager Don Gunn told the <i>Daily Post</i> that Japanese visitors - one of Rotorua's biggest markets - were down by 26.5 per cent on last year. One of the main reasons for the slump was Air New Zealand stopping flights from Nagoya in Japan to New Zealand.
Perception of Rotorua	The decrease in visitors is negative but the proactive tourism leaders can assist in a more positive perception.

Title / Author	<i>"Police put spoke in it"</i> By J. Rowan.
Source	www.nzherald.co.nz
Abstract	Bike thieves beware: Rotorua police have a plan to protect the hundreds of valuable racing cycles in the city for the world mountain bike championships. Under the leadership of community policing head Senior Sergeant Brent Crowe, police are offering competitors a free registration system. Riders record personal and bike details, including make, model and serial number, on a police database and get a fluorescent green sticker to attach to the frame to deter thieves. Senior Sergeant Crowe said the stickers were difficult to remove and showed that the bike was registered.
Perception of Rotorua	Positive.

Title / Author	<i>"Lap of luxury on the lake"</i> By M. Crawshaw.
Source	www.nzherald.co.nz
Abstract	It's not common to visit Rotorua and ignore every tourist spot. The city is, after all, one of New Zealand's oldest tourist destinations. Few offer such an exhaustive range of things to do in such a small place. It's the North Island's answer to Queenstown.
Perception of Rotorua	Positive.

Title / Author	<i>"Mountain-biking worth \$4 million a year to Rotorua – report"</i> By I. Tiriana.
Source	www.dailypost.co.nz
Abstract	Mountainbiking could change the face of tourism in Rotorua. Developer Ray Cook believes it so strongly he commissioned a report to assess mountainbiking's importance to Rotorua and the potential for future growth. That potential for Rotorua to become the world's top mountainbiking destination is huge if the city builds on the momentum gained from this week's UCI World Mountain Bike and Trials Championships, he says. "We can use this as a platform to build on," he told the Daily Post. Visitor spending in Rotorua last year totalled about \$447 million. The APR Consultants' report on mountainbiking estimates mountainbiking-related spending - by locals and visitors - is about \$4.35 million a year.
Perception of Rotorua	Positive.

Title / Author	<i>"1981 Springbok tour horrors recalled"</i> By M. Geenty.
Source	www.nzherald.co.nz
Abstract	Recalling the Springbok tour in 1981. One of the fondest memories was time spent in Rotorua.
Perception of Rotorua	Positive.

Title / Author	<i>"Mountain biking: World title queenella leap for Kiwi sport"</i> By T. Maddaford.
Source	www.nzherald.co.nz
Abstract	For five agonising minutes, Oceania junior champion Cameron Cole sat on the ornately carved, aptly named hot-seat and stared back up the mountain. After posting a slick 3m 28.39s over the 2.2km downhill course at the UCI World Mountain Bike Championships, the waiting game began. One by one, four of the five riders who had followed Cole on the hair-raising descent came up short. Only teammate and top seed Sam Blenkinsop remained.
Perception of Rotorua	Positive.

Title / Author	<i>“NZ favourite spot for adrenalin junkie Jack”.</i> By A. Caspari.
Source	www.nzherald.co.nz
Abstract	New Zealand is reality television star Jack Osbourne's favourite destination and Rotorua has had a big part to play in that. The son of music legend Ozzy and Sharon Osbourne kayaked the Kaituna in Rotorua in May as part of the second series of “Jack Osbourne; Adrenalin Junkie” where he attempts feats of daring and stamina. Asked in a recent interview in the UK which was his favourite destination during filming, Jack said New Zealand was a highlight. He described the country as amazing. Osbourne and his production team were brought to New Zealand as part of Tourism New Zealand's international media programme to kayak the world's only commercial grade five river rapid on the Kaituna River in Rotorua.
Perception of Rotorua	Positive.

Title / Author	<i>“It's been China, now Rotorua eyed as potential Narnia”.</i> By M. Mather.
Source	www.dailypost.co.nz
Abstract	Film companies, including one seeking a home for a talking lion, have been scoping potential locations in Rotorua. The Daily Post understands scouts for “The Chronicles of Narnia - Prince Caspian”, the sequel to last year's hit “The Lion, The Witch and the Wardrobe” have recently been in the area, as have producers of at least two other movies. Although he couldn't confirm the involvement of the Narnia producers, Volcanic Locations manager Kevin Rowell said he had recently helped several location scouts identify possible shooting sites for upcoming movies.
Perception of Rotorua	Positive.

3.3 Key points from the literature review:

- Maori based tourism in Rotorua somewhat fails the domestic market particularly Auckland visitors who visit Rotorua as a short break destination town. The tourism focuses on ‘traditional authenticities’ aimed at the overseas market and ignores the vibrant nature of Maori music and dance performance which may be of more interest to domestic visitors.
- Visitors to Rotorua are predominantly domestic in origin (57.3%), travel as a family or as couples and are on a holiday or leisure for one to three days.
- Domestic visitors predominantly use private vehicles for transport and two thirds of international visitors use hire vehicles
- Thermal attractions are primarily for international visitors while domestic visitors are more attracted to general activities and the natural environment.
- While there is a perception that Rotorua has a problem with crime there are moves afoot from various quarters to create a proactive approach to reducing crime in the district.
- The profile of Rotorua being a place to go to is reinforced by the number of events happening there. For example the World Mountain Biker Championships as well as the building of Rotorua's giant events centre to accommodate more events.
- There is pro-active leadership in Rotorua including the tourism leaders who are looking at ways of attracting Japanese tourists back to Rotorua and those heading Rotorua's Bright Economy Advisory Board who are looking at the concepts of a hub in Rotorua for growing a global industry of bio-materials.

4.0 ROTORUA PERCEPTIONS SURVEY REPORT 1996

This report was based on the results of four focus groups of recent graduates and local business people and a telephone survey of Rotorua employers. Focus groups were undertaken in both Rotorua and Hamilton. The project was initiated by the Economic and Business Development Unit of Rotorua District Council following initial discussions with a number of local employers indicating they had some difficulty in staff recruitment and retention. The primary aims of the study were as follows:

1. To identify what specific positive and negative perceptions may exist in relation to working and living in Rotorua.
2. To identify possible strategies for making Rotorua a more attractive option for people to relocate for employment and to remain in as long as possible.

In general, people who lived outside the district and had not visited within the last few years tended to have a lower opinion of Rotorua than those who lived there or had recently visited or relocated to the district.

Most people living outside the district held the usual stereotypical views of Rotorua as a tourism and forestry centre, with a high proportion of Maori, and problems with unemployment and crime. Little was currently known by these people about the recent changes to Rotorua (such as the CBD upgrade), and equally little was known about the diversity of career opportunities available within the District. Some people's perception is that in terms of its tourism industry, Rotorua is "stagnant" compared to such places as Queenstown, where new attractions are given a high priority.

The survey results are presented below as a SWOT analysis (ie, strength, weaknesses, opportunities and threats).

4.1 Strengths

- Outdoor recreation opportunities such as mountain biking.
- Quality and accessibility of the physical environment, especially the lakes and forests.
- Low population base and related factors.
- Temperate climate, though relatively cold in the winter.
- Low housing and living costs.
- Short travel times, both within the city and in terms of proximity to other central North Island locations, including the coast and ski slopes.
- Good career prospects in the tourism and forestry sectors, in which Rotorua is perceived as a national leader.
- Recent upgrades to the CBD, and the subsequent expansion in the range of cafés, etc.
- Although Rotorua is a "tourist town," it is not perceived as blatantly commercialised. Those who live in the district and who are not directly involved with the tourism industry generally find it to have low visibility.
- The variety of work within certain professions (eg, litigators have an opportunity in Rotorua to gain court experience, which they would not obtain in the bigger cities). Also, it is possible to progress one's career in specific sectors much more quickly in a smaller city.

4.2 Weaknesses

- Disorganised town planning, including the main routes into the city, and a lack of public transport.
- Inability to attract and/or retain major corporate headquarters.
- Low population base and related factors.

- Low salary levels compared to major cities.
- Lack of cultural/entertainment facilities for local people (eg, concerts).
- High unemployment and crime rates and a perception of cultural tension problems.
- Poor retail shopping (eg, no late night shopping).
- Poor parking and roading system.
- Perception of poor educational standards, apart from at the early childhood level. No university or professional development courses available locally.
- Lack of job opportunities for partners of people who are relocating for a job.
- Limited career opportunities for those not involved in tourism or forestry.
- Lack of developed industrial sites.
- Lack of international outlets such as a port or airport.
- Lack of primary resources such as oil or minerals.

4.3 Opportunities

- Provide information on the range of career opportunities available, including information on any major corporate firms.
- Increase the number and range of indoor activities such as cafés and concerts, and make better use of the Convention Centre for cultural events aimed at local people.
- Develop further themes within the town, as has already begun with the café culture at the lake end.
- Provide information about the lifestyle and activities available (eg, distance to beaches, lakes and ski fields), and ensure that facilities (eg, toilets) are maintained to a high standard.
- Create a more positive attitude towards the promotion of young people and careers.
- Provide information about demographics.
- Provide information about training opportunities and support networks.
- Describe how Rotorua can fit into a career path.
- Provide information on educational facilities, from primary to tertiary.
- Market Rotorua in relation to its position within the Bay of Plenty (both geographically and in terms of building a mental image), and in terms of its proximity to Taupo and to Hamilton International Airport. Maintain good transportation systems with other cities, and build closer links with Hamilton International Airport.
- Rotorua's geographical position between the Kawerau and Kinleith mills means that companies can use Rotorua as a base to service these industries, and also that skilled staff can commute from Rotorua to the mills. Encourage adjacent cities such as Hamilton and Tauranga to also utilise the expertise of Rotorua firms. Sell an integrated package of services. Concentrate on expanding the district's catchment for employees, rather than trying to compete with Auckland and Wellington.
- Promote Rotorua's distinctive smell in a positive manner as a unique feature.
- Improve public transport.
- Develop more industrial sites outside of the town itself, and attract timber re-processing firms. Also, facilitate the development of larger corporate/central offices through the use of technology, incentives (eg, rates) and other aspects such as domestic flights.
- Promote synergies between forestry, tourism and education, eg, eco-tourism and educational tourism.
- Consider ways in which Rotorua may attract more retired people, a strategy which has worked successfully for Tauranga.
- Clean up the routes into Rotorua in terms of vistas, road access and management.
- Involve the community more in crime prevention. Establish more of an official presence around the lake access areas (eg, DOC rangers or Eastern Fish and Game wardens) in order to maintain the sites and decrease crime.
- Work with the media to improve Rotorua's image. Emphasise such things as the emerging cosmopolitan atmosphere.
- Develop a network of educational leaders (eg, school principals) in order to increase teaching skill levels and to lobby for funding. There is also a large amount of further

potential for developing Rotorua's tertiary education provision, especially in relation to forestry. Work is currently under way for creating strategic liaisons for promoting Rotorua for international field trips, etc. Promote Rotorua's educational track record and the benefits of a multi-cultural/bi-lingual education. Facilitate tertiary and professional development courses which are tailored to the conditions of the local work environment.

- Lobby for the retention of existing health services, and support new services such as paediatrics.
- Develop networks to assist Asian families and businesses to become assimilated.
- Develop networks or provide information on career opportunities for partners. Also, provide information on recognition standards for overseas qualifications, and lobby for more recognition of overseas qualifications (eg, Canadian nursing certificate).
- Continue to lobby the New Zealand Tourism Board to provide the North Island with a more equitable level of exposure in its promotional material.

4.4 Threats

- The settlement of Treaty of Waitangi issues (eg, ownership of the lakes).
- The loss of any major industries, and in particular the effect of a slowdown in Rotorua's tourism sector (eg, through competition from other emerging tourism centres such as Taupo and Tauranga).
- Further loss of regional and central offices through restructuring.
- The perception that the development of new ventures may be negatively influenced by Maori objections.

5.0 BRIGHT ECONOMY GROWTH OPPORTUNITIES FORUM

During the Bright Economy Growth Forum participants split into groups one of which was the immigration and lifestyle investment workshop. Participants were asked for their opinions on various questions related to this topic and the following tables indicate their responses.

What would be the best marketing tools we could develop to help you overcome your business investment and staff recruitment issues while also assisting us to sell a positive Rotorua investing and doing business message?

- Best marketing tools:
 - Word of mouth referrals/testimonials (personal connection).
 - Billboards – visual packages.
 - Website – www.rotorua.com-living (business links on our business website).
- Co-operation – “Getting it together – together”.
- One vision – destination first.
- Branding – ‘feel the spirit/manakitanga’ t-shirt.
- Authenticity – cultural experience, kiwi experience.
- Wireless city – high speed internet hot spots.
- ‘The Hub’ – easy access.
- Channel positive message to media.
- Better publicity of 10-year plan.
- Target skills need analysis.
- Top website a must.
- RDC backing, charities with financial with infrastructure – technology.
- Stronger alliances with newspapers/radio more positive influences.
- Attract overseas journalists to stay (ie, UCI world mountain biking champs).
- Make it a positive experience.
- Clean lakes – top priority.
- Conference specifically on ‘IT’ opportunities for businesses.
- Telecom not willing to ‘share’ resources or increase resources.
- Keep ahead of ‘transport’ plans.
- Revisit ‘cleaning’ Rotorua – make sure it is always top notch for ‘beautiful Rotorua’ keeping it beautiful.
- Websites – further development, link to immigration.
- Collaboration – BOP.
- Information packs for overseas business trips.
- Radio.
- Quality education.
- Career opportunities.
- Limited cultural opportunities.

What do you see as the top 3 negative perceptions of Rotorua as a place to:	Reasons.
Live, work and learn.	<ul style="list-style-type: none"> ▪ Education for families – Deciles 1-10. ▪ Career structure, unskilled, skilled. ▪ Tertiary qualified. ▪ Low paid perception. ▪ Gang culture. ▪ Crime. ▪ Develop migrant resource centre. ▪ High crime rate especially involving crime against tourists. ▪ Bad publicity – perception media highlight Rotorua unfairly. ▪ Schooling – not up to same levels of other centres. ▪ Losing to other centres (tertiary).
Invest and do business.	<ul style="list-style-type: none"> ▪ Lack of awareness – re: diversity, what it has to offer. ▪ 2nd class city. ▪ Quality of education – high schools and tertiary. ▪ Crime. ▪ Smell. ▪ Problem or opportunity.
Invest and do business.	<ul style="list-style-type: none"> ▪ Criminal/dark side – car hoons, crime, litter, groups of youths, drink/drive. ▪ Average income is low – perception that if you move here – you will earn less. ▪ Education – how good are schools versus Hamilton and Tauranga? ▪ Local newspaper – if visited website of local paper the headlines are negative need more positive news.
Invest and do business.	<ul style="list-style-type: none"> ▪ Local negativity. ▪ Media representation. ▪ Return on investment for industries. ▪ Council rates. ▪ Freight charges. ▪ Difficult to attract skilled people. ▪ Attract off-shore investors, policy needs to change. ▪ Information technology investment (Tauranga way ahead). Great infrastructure already in place.
Invest and do business.	<ul style="list-style-type: none"> ▪ Lack of high quality business space. ▪ Lack of cohesiveness of CBD. ▪ Can't get the workforce. ▪ Not many high level positions here – limited career prospects.
Invest and do business.	<ul style="list-style-type: none"> ▪ Not near port or major market. ▪ Infrastructure – road and rail. ▪ Unskilled/unstable workforce (transient). ▪ Lack of career/opportunity.

What do you see as the top 3 positive perceptions of Rotorua as a place to:	Reasons.
Live, work & learn.	<ul style="list-style-type: none"> ▪ Education for families – Deciles 1-10. ▪ Progressive tourism. ▪ Ten-year plan. ▪ Lifestyle.
	<ul style="list-style-type: none"> ▪ Recreation options – indoors / outdoors. ▪ Centrally situated – ski fields, beach, Auckland. ▪ Airport. ▪ Road access.
	<ul style="list-style-type: none"> ▪ The outdoor environment. ▪ Slower pace of life – noise etc. ▪ Work/life balance – family. ▪ Good access, ease, activities. ▪ Venues, clubs – safety for kids. ▪ Family community environment. ▪ Lots of community groups. ▪ Local radio stations. ▪ Good inner city – visual, attractive.
	<ul style="list-style-type: none"> ▪ Location – central (external) – beach, snow, city (leisure perspective). ▪ Large range of attractions / activities / stimulation in Rotorua (internal). ▪ Value for money – housing, transport.
Invest & do business.	<ul style="list-style-type: none"> ▪ Leisure perspective. ▪ Time / travel saving. ▪ Cheaper price / higher value – more discretionary income.
	<ul style="list-style-type: none"> ▪ Affordable. ▪ Ten-year plan. ▪ Tourist potential. ▪ Overseas branding. ▪ Domestic tourism.
	<ul style="list-style-type: none"> ▪ Good value housing. ▪ Investments. ▪ Unemployment low. ▪ Land values. ▪ Road access. ▪ Active Chamber of Commerce – good support.
	<ul style="list-style-type: none"> ▪ Opportunities – start up. ▪ Good business support. ▪ Council support and cooperation. ▪ Good networks. ▪ Cheap office space. ▪ Informal networking very effective. ▪ Central location.
	<ul style="list-style-type: none"> ▪ Location markets within forestry, tourism and agriculture (primary industries). ▪ Regional / trans-Tasman airport. ▪ “More bang for your buck”. ▪ Commercial properties (cheaper per square metre).

5.1 Key points from the Bright Economy Forum:

5.1.1 To overcome business investment and staff recruitment issues

- **Build relationships**
Build strong relationships within the district including the improvement of personal connections and word of mouth referrals, collaboration between local business in the district and in the Bay of Plenty and strengthen alliances with the media to sell the positive aspects of Rotorua.
- **Information technology**
Improve the information technology infrastructure in the district including high speed internet hot spots, links to the skills sets available from immigration, encouraging telecom to share their resources, organising and running an IT conference, linking all businesses to a first class proactive business website.
- **Education**
Provide high quality education system, improve career opportunities and target the skill areas required for the future.
- **Branding**
Highlight the 'feel the spirit' brand and build other marketing for Rotorua around this brand. Encourage all Rotorua businesses to have this brand included on their products and services marketing material. Develop visual packages and billboards advertising the brand.

5.1.2 Top three negative perceptions of Rotorua as a place to live, work and learn

- **Education**
The schooling is not up to the same levels as other centres. Conjecture on how well Rotorua schools rate against Tauranga and Hamilton.
- **Crime**
There is a perception of high crime rates in Rotorua particularly against tourists and a perception of a criminal/dark side to the area.
- **Bad media**
There are more negative stories about Rotorua in the media than positive and a perception that the media treats Rotorua unfairly.

5.1.3 Top three negative perceptions of Rotorua as a place to invest and do business

- **Career opportunities**
There is a perception that career opportunities are limited in Rotorua and that it is difficult to attract skilled people. There is some perception that the workforce is transient and unstable and somewhat unskilled.
- **Bad media**
The perception of the negative way the media highlights Rotorua is also a concern to those that want to invest and do business.
- **Business space**
There is some perception that there is a lack of high quality business space in Rotorua.

5.1.4 Top three positive perceptions of Rotorua as a place to live, work and learn

- **Location**

There is a perception that the central location of Rotorua is a positive factor for the city with only a short drive to the ski fields, Auckland or the beach. The close proximity of a good size airport is also seen as a big plus for the city. It is thought that people save time travelling in and around Rotorua so they may have more discretionary income than if they lived in a city like Auckland. There is also a perception of value for money housing in the district.

- **Environment**

Perceptions of an outdoor environment, a good work/life balance and a slower pace are seen as positive aspects for living, working and learning in Rotorua. There is also a perception of good community groups and a visually good inner city.

- **Range of attractions**

There is a perception that Rotorua offers a range of attractions to people who live there as well as domestic and overseas visitors.

5.1.5 Top three positive perceptions of Rotorua as a place to invest and do business

- **Strong business support**

There is a perception that Rotorua has a strong business network and good start up opportunities. The Council is seen as cooperative and supportive to business and the Chamber of Commerce is seen as active in the district.

- **Location**

The central location of Rotorua in relation to other cities is perceived as a positive factor for businesses in the area as well as those thinking of where to start up.

- **Affordable commercial land**

Commercial properties in Rotorua are perceived to be cheaper per square metre and office space cheaper than in many other cities.

SECTION 2: LIVE, WORK & LEARN SURVEY RESULTS

6.0 TELEPHONE SURVEY

A total of 200 telephone surveys were undertaken with residents from the Bay of Plenty and Waikato regions and selected domestic markets (ie, Auckland, Wellington and Canterbury).

The top first three impressions that the general New Zealand public (including Rotorua residents) had of Rotorua was 'geothermal activity/smell/geysers' (72.5%), 'attractions/activities/things to do' (41.5%) and 'tourist destination' (31.5%). Other perceptions that were identified included 'lakes/nature/scenery', 'Maori/Maori culture', 'attractive/clean town', 'family/friends/family history' and 'shopping'. (Refer to Table 1).

Table 1 – First three impressions/perceptions of Rotorua

	Number	Percent
Geothermal activity/smell/geysers	145	72.5%
Attractions/activities/things to do	83	41.5%
Tourist destination	63	31.5%
Lakes/nature/scenery	60	30.0%
Maori/Maori culture	42	21.0%
Attractive/clean town	39	19.5%
Family/friends/family history	25	12.5%
Shopping	19	9.5%
Central location	18	9.0%
Friendly people	13	6.5%
Weather/climate	12	6.0%
Crime	6	3.0%
Other	59	29.5%
Sample	200	

Note: Not additive as respondents could identify multiple things

Respondents were asked to rate different aspects of Rotorua on a perception scale of one through to five (ie, excellent, good, average, poor, very poor). Firstly, respondents were asked to rate their perception of Rotorua's geographic location (proximity to other places). A total of 147 respondents (73.5%) had an excellent or good perception, a further 22.0% had an average perception and 3.5% had a poor perception of Rotorua's geographic location. (Refer to Table 2).

A total of 74 respondents (37.0%) had an average perception of housing in Rotorua, almost one-third (30.0%) had a good perception of housing, 23.0% did not know and 5.5% had a poor or very poor perception. (Refer to Table 2).

Just under one-third of respondents (30.5%) had an excellent or good perception of education in Rotorua, 30.0% had an average perception, 9.5% had a poor or very poor perception and a further 30.0% did not know. (Refer to Table 2).

A total of 77 respondents (38.5%) had an excellent or good perception of healthcare in Rotorua, 61 respondents (30.5%) had an average perception, one-tenth (10.0%) had a poor or very poor perception and one-fifth (20.5%) did not know. (Refer to Table 2).

Table 2 – Perceptions of geographic location, housing, education and healthcare

Perception	Geographic location		Housing		Education		Healthcare	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Excellent	61	30.5%	9	4.5%	11	5.5%	26	13.0%
Good	86	43.0%	60	30.0%	50	25.0%	51	25.5%
Average	44	22.0%	74	37.0%	60	30.0%	61	30.5%
Poor	7	3.5%	10	5.0%	16	8.0%	18	9.0%
Very poor	0	0.0%	1	0.5%	3	1.5%	2	1.0%
Don't know	2	1.0%	46	23.0%	60	30.0%	41	20.5%
Not specified	0	0.0%	0	0.0%	0	0.0%	1	0.5%
Total	200	100.0%	200	100.0%	200	100.0%	200	100.0%

Half of respondents (50.5%) had a good or excellent perception of infrastructure in Rotorua, a further 29.5% had an average perception, 12.5% had a poor or very poor perception and 7.0% did not know. (Refer to Table 3).

Almost one-third of respondents (31.0%) had a good or excellent perception of safety in Rotorua and two-fifths (41.5%) had an average perception. Almost one-fifth of respondents (19.0%) had a poor or very poor perception of safety in Rotorua. (Refer to Table 3).

Almost one-quarter of respondents (23.5%) had a good or excellent perception of employment opportunities in Rotorua. Over one-third (35.0%) had an average perception, 17.0% had a poor or very poor perception and a further one-quarter (24.0%) of respondents did not know. (Refer to Table 3).

Almost half of respondents (48.5%) had a good or excellent perception of community spirit in Rotorua. One-quarter (26.5%) had an average perception and 9.5% had a poor or very poor perception of community spirit in Rotorua. A further 15.5% did not know. (Refer to Table 3).

Table 3 – Perceptions of infrastructure, safety, employment opportunities and community spirit

Perception	Infrastructure		Safety		Employment Opps		Community spirit	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Excellent	15	7.5%	7	3.5%	6	3.0%	26	13.0%
Good	86	43.0%	55	27.5%	41	20.5%	71	35.5%
Average	59	29.5%	83	41.5%	70	35.0%	53	26.5%
Poor	23	11.5%	34	17.0%	30	15.0%	17	8.5%
Very poor	2	1.0%	4	2.0%	4	2.0%	2	1.0%
Don't know	14	7.0%	16	8.0%	48	24.0%	31	15.5%
Not specified	1	0.5%	1	0.5%	1	0.5%	0	0.0%
Total	200	100.0%	200	100.0%	200	100.0%	200	100.0%

Almost three-quarters of respondents (72.0%) had a good or excellent perception of events/activities/entertainment in Rotorua. A total of 34 respondents (17.0%) had an average perception and 7.5% had a poor or very poor perception. (Refer to Table 4).

Half of respondents (49.0%) had a good or excellent perception of the weather/climate in Rotorua, while a further 42.0% had an average perception. A total of 16 respondents (8.0%) had a poor or very poor perception of the weather/climate in Rotorua. (Refer to Table 4).

A total of 168 respondents (84.0%) had an excellent or good perception of the tourism industry in Rotorua. Twelve percent had an average perception and only 3.5% had a poor or very poor perception. (Refer to Table 4). No respondents specified any 'other' comments.

Table 4 – Perceptions of events, weather, tourism and other

Perception	Events/activities/ent		Weather/climate		Tourism industry		Other	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Excellent	53	26.5%	9	4.5%	104	52.0%		0.0%
Good	91	45.5%	89	44.5%	64	32.0%		0.0%
Average	34	17.0%	84	42.0%	24	12.0%		0.0%
Poor	13	6.5%	13	6.5%	5	2.5%		0.0%
Very poor	2	1.0%	3	1.5%	2	1.0%		0.0%
Don't know	6	3.0%	2	1.0%	1	0.5%		0.0%
Not specified	1	0.5%	0	0.0%	0	0.0%	200	100.0%
Total	200	100.0%	200	100.0%	200	100.0%	200	100.0%

Respondents were asked to think about education at each level from early childhood through to tertiary education and give a positive or negative perception rating, (ie, extremely positive, positive, average, negative or extremely negative). One-third of respondents had a positive or extremely positive perception of the quality of early childhood education. Thirty percent had an average perception, and a further thirty percent did not know.

Over one-third of respondents (36.0%) had a positive or extremely positive perception of the quality of primary education in Rotorua. A further 31.5% had an average perception, 3.0% had a negative or extremely negative perception and one-quarter of respondents (27.0%) did not know.

One-third of respondents (33.5%) had a positive or extremely positive perception of the quality of secondary education in Rotorua. A further 30.5% had an average perception, one-quarter (24.0%) did not know and 9.5% had a negative or extremely negative perception.

Over one-fifth of respondents (22.5%) had a positive or extremely positive perception of tertiary education in Rotorua. Almost equally (21.0%) had a negative or extremely negative perception, 57 respondents (28.5%) had an average perception and one-quarter (25.0%) did not know. (Refer to Table 5).

Table 5 – Perceptions of quality of education in Rotorua

Perception	Early childhood		Primary		Secondary		Tertiary	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Extremely positive	17	8.5%	19	9.5%	16	8.0%	6	3.0%
Positive	50	25.0%	53	26.5%	51	25.5%	39	19.5%
Average	60	30.0%	63	31.5%	61	30.5%	57	28.5%
Negative	5	2.5%	5	2.5%	17	8.5%	29	14.5%
Extremely negative	2	1.0%	1	0.5%	2	1.0%	13	6.5%
Don't know	60	30.0%	54	27.0%	48	24.0%	50	25.0%
Not specified	6	3.0%	5	2.5%	5	2.5%	6	3.0%
Total	200	100.0%	200	100.0%	200	100.0%	200	100.0%

Respondents were then asked to rate their perceptions about housing in Rotorua, (ie, extremely positive, positive, average, negative or extremely negative). A total of 70 respondents (35.0%) had a positive or extremely positive perception of the quality of housing in Rotorua. A further 43.5% had an average perception, 6.5% had a negative or extremely negative perception and 14.5% did not know.

Almost two-fifths of respondents (37.0%) had a positive or extremely positive perception of the affordability of housing in Rotorua, 34.0% had an average perception, 19.5% did not know and 9.0% had a negative perception.

Over half of respondents (58.0%) had a positive or extremely positive perception of housing in relation to proximity of amenities. A further 37 respondents (18.5%) had an average perception and 21.5% did not know. (Refer to Table 6).

Table 6 – Perceptions of housing in Rotorua

Perception	Quality		Affordability		Proximity to amenities	
	Number	Percent	Number	Percent	Number	Percent
Extremely positive	6	3.0%	11	5.5%	31	15.5%
Positive	64	32.0%	63	31.5%	85	42.5%
Average	87	43.5%	68	34.0%	37	18.5%
Negative	12	6.0%	18	9.0%	2	1.0%
Extremely negative	1	0.5%	0	0.0%	0	0.0%
Don't know	29	14.5%	39	19.5%	43	21.5%
Not specified	1	0.5%	1	0.5%	2	1.0%
Total	200	100.0%	200	100.0%	200	100.0%

Respondents were asked their perceptions of different aspects of living in Rotorua like sports facilities, cultural facilities, social groups, and outdoors environment. A total of 115 respondents (57.5%) had a positive or extremely positive perception of sports facilities in Rotorua. A further 27.0% had an average perception, 12.5% did not know and 2.5% had a negative or extremely negative perception. (Refer to Table 7).

Over three-quarters of respondents (79.5%) had a positive or extremely positive perception of cultural facilities, 13.5% had an average perception and 4.5% had a negative or extremely negative perception. (Refer to Table 7).

Just under half of respondents (45.0%) had a positive or extremely positive perception of social groups in Rotorua. A further 32.5% had an average perception and 17.5% did not know. (Refer to Table 7).

Almost all respondents (97.0%) had an extremely positive or positive perception of the outdoors environment/easy access to outdoors in Rotorua. A further four respondents (2.0%) had an average perception and two respondents (1.0%) did not know. (Refer to Table 7).

Table 7 – Perceptions of facilities that enhance living in Rotorua

Perception	Sports facilities		Cultural facilities		Social groups		Outdoor environment	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Extremely positive	29	14.5%	61	30.5%	20	10.0%	116	58.0%
Positive	86	43.0%	98	49.0%	70	35.0%	78	39.0%
Average	54	27.0%	27	13.5%	65	32.5%	4	2.0%
Negative	4	2.0%	8	4.0%	9	4.5%	0	0.0%
Extremely negative	1	0.5%	1	0.5%	0	0.0%	0	0.0%
Don't know	25	12.5%	4	2.0%	35	17.5%	2	1.0%
Not specified	1	0.5%	1	0.5%	1	0.5%	0	0.0%
Total	200	100.0%	200	100.0%	200	100.0%	200	100.0%

Respondents were asked about their perceptions of working in Rotorua and whether it was positive or negative. A total of 41.0% of respondents had an average perception of wage rates in Rotorua, a further 23.5% had a negative or extremely negative perception, 21.0% did not know and 12.5% had a positive perception. (Refer to Table 8).

One-third of respondents (33.0%) had an average perception of career progression in Rotorua. Over one-quarter (27.0%) had a negative or extremely negative perception, 22.0% did not know and 16.0% had a positive or extremely positive perception. (Refer to Table 8).

One-third of respondents (33.0%) had a positive perception of transport links (ie, road, air) in the Rotorua District. Over one-quarter (26.5%) had an average perception, 22.5% did not know, 8.0% had an extremely positive perception and 7.5% had a negative or extremely negative perception. (Refer to Table 8).

A total of 93 respondents (46.5%) had a positive or extremely positive perception of roading in the Rotorua District. One-third (32.0%) had an average perception and 13.5% did not know. (Refer to Table 8).

A total of 37.0% of respondents had a positive or extremely positive perception of the business environment in Rotorua, a further one-third (32.5%) had an average perception and 19.5% did not know. A total of 18 respondents (9.0%) had a negative or extremely negative perception of the business environment in Rotorua. (Refer to Table 8).

Table 8 – Perceptions of working in Rotorua

Perception	Wage rates		Career progression		Transport links		Roading		Business environment	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Extremely positive	0	0.0%	3	1.5%	16	8.0%	16	8.0%	13	6.5%
Positive	25	12.5%	29	14.5%	66	33.0%	77	38.5%	61	30.5%
Average	82	41.0%	66	33.0%	53	26.5%	64	32.0%	65	32.5%
Negative	41	20.5%	47	23.5%	14	7.0%	10	5.0%	14	7.0%
Extremely negative	6	3.0%	7	3.5%	1	0.5%	1	0.5%	4	2.0%
Don't know	42	21.0%	44	22.0%	45	22.5%	27	13.5%	39	19.5%
Not specified	4	2.0%	4	2.0%	5	2.5%	5	2.5%	4	2.0%
Total	200	100.0%	200	100.0%	200	100.0%	200	100.0%	200	100.0%

Respondents were asked to identify three improvements that they would make to Rotorua to make it a better place to live, work and learn. A total of 21.0% of respondents suggested improvements around “crime/youth/negative image/safety”, a further 21.0% suggested improvements to the town.

Table 9 - Suggested improvements

	Number	Percent
Crime/youth/negative image/safety	42	21.0%
Town improvements	42	21.0%
Jobs/employment/business	34	17.0%
Community wellbeing	31	15.5%
Education	27	13.5%
Community/sport activities/events	24	12.0%
Environment/clean lakes/rubbish	23	11.5%
Other infrastructure improvements	19	9.5%
Airport	15	7.5%
Attraction/event improvements	8	4.0%
Parking	8	4.0%
Public transport	5	2.5%
Other	47	23.5%
Sample	200	

Note: Not additive as respondents could identify multiple improvements

The largest occupational group of respondents was retired (26.0%), followed by professional and technical (23.0%) and administration and clerical (12.5%). Other occupations represented included service worker (9.5%), managerial worker (8.0%), ‘other’ (8.0%) and homemaker (4.5%). (Refer to Table 10).

Table 10 - Occupation of respondents

	Number	Percent
Retired	52	26.0%
Unemployed	4	2.0%
Admin & clerical	25	12.5%
Managerial worker	16	8.0%
Professional & technical	46	23.0%
Student	5	2.5%
Homemaker	9	4.5%
Agriculture, forestry and fishing	7	3.5%
Service worker	19	9.5%
Other	16	8.0%
Not specified	1	0.5%
Total	200	100.0%

Over half of respondents (57.0%) were female and 42.0% were male. Two respondents (1.0%) were not specified. (Refer to Table 11).

Table 11 - Gender of respondent

	Number	Percent
Male	84	42.0%
Female	114	57.0%
Not specified	2	1.0%
Total	200	100.0%

The majority of respondents (60.5%) were aged between 30 and 59 years. A further 31.5% were over 60 years of age, and 7.5% were aged between 16 and 29 years. (Refer to Table 12).

Table 12 - Age group of respondents

	Number	Percent
16-20	2	1.0%
21-29	13	6.5%
30-39	44	22.0%
40-49	40	20.0%
50-59	37	18.5%
60-69	30	15.0%
70+	33	16.5%
Refused	1	0.5%
Not specified	0	0.0%
Total	200	100.0%

Of the 200 respondents surveyed, 100 (50.0%) were from Rotorua, 25 (12.5%) from Waikato/Bay of Plenty, 25 (12.5%) from Auckland/Northland, 25 (12.5%) from Canterbury/Otago and one respondent (0.5%) did not specify. (Refer to Table 13).

Table 13 - Respondents usual place of residence

	Number	Percent
Auckland/Northland	25	12.5%
Canterbury	24	12.0%
Otago	1	0.5%
Wellington	24	12.0%
Waikato/Bay of Plenty	125	62.5%
West Coast	0	0.0%
Hawke's Bay/Gisborne	0	0.0%
Marlborough/Nelson/Tasman	0	0.0%
Taranaki/Manawatu/Wanganui	0	0.0%
Southland	0	0.0%
Overseas	0	0.0%
Other	0	0.0%
Not specified	1	0.5%
Total	200	100.0%

A total of 63 respondents (31.5%) had lived in their area for 26-50 years, 45 respondents (22.5%) had lived in their area for 16-25 years, 27 respondents (13.5%) had lived in their area for one to five years and 26 respondents (13.0%) had lived in their area for six to ten years. (Refer to Table 14).

Table 14 - Length of time respondents' have lived in their area

	Number	Percent
Less than 1 year	4	2.0%
1-5 years	27	13.5%
6-10 years	26	13.0%
11-15 years	15	7.5%
16-25 years	45	22.5%
26-50 years	63	31.5%
50 years +	20	10.0%
Refused	0	0.0%
Not specified	0	0.0%
Total	200	100.0%

A total of 134 respondents (67.0%) were NZ European/Pakeha, 16 respondents (8.0%) were Maori

Table 15 - Ethnicity of respondents

	Number	Percent
NZ European/Pakeha	134	67.0%
NZ Maori	16	8.0%
NZ Maori & Pakeha	11	5.5%
Pacific Island	1	0.5%
Asian	3	1.5%
Other	34	17.0%
Not specified	1	0.5%
Total	200	100.0%

6.1 Key points from the telephone survey – live, work and learn:

- The majority of the New Zealand public respondents rated the geographic location and community spirit of Rotorua well.
- Over 50% of the New Zealand public respondents rated Rotorua as having an excellent tourism industry and 72% rated events/activities/entertainment as good or excellent.
- Up to a third of the New Zealand public did not know about the quality of education in Rotorua but 21% rated tertiary education as negative or extremely negative.
- Over 50% of the New Zealand public respondents rated proximity to amenities in Rotorua as positive or extremely positive.
- Sports facilities and cultural facilities were rated very positively by the New Zealand Public respondents. The outdoor environment was rated extremely positively.
- Over a quarter of the New Zealand public respondents rated wage rates and a career progression negatively.
- The three main impressions of Rotorua from the New Zealand public respondents were:
 - Geothermal activity/smell/geysers
 - Attractions/activity and things to do
 - Tourist destination
- Other key perceptions were:
 - Lakes/nature/scenery
 - Maori/Maori culture
 - Attractive/clean town
- A total of 21% of respondents suggested improvements around crime/youth/negative image/safety and improvements to the town.

7.0 ONLINE SURVEY

An online survey considering issues around living, working and learning in Rotorua was sent to those who attended the Economic Forum, the Chamber of Commerce network as well as through Business SWAP. The results are listed below.

Table 16 - First three impressions/perceptions of Rotorua

	Number	Percent
Lakes/nature/scenery/outdoors	64	61.5%
Geothermal activity/smell/geysers	52	50.0%
Maori/Maori culture	36	34.6%
Attractions/activities/things to do	31	29.8%
Tourist destination	22	21.2%
Central location	20	19.2%
Attractive/clean town	13	12.5%
Family/friends/family history/home	11	10.6%
Shopping/economy	9	8.7%
Crime	6	5.8%
Lifestyle	6	5.8%
Friendly people	3	2.9%
No traffic congestion	3	2.9%
Quiet	3	2.9%
Cheap property	2	1.9%
Weather/climate	2	1.9%
Other	16	15.4%
Sample	104	

Note: Not additive as respondents could identify multiple things

There were 61.5% of respondents who suggested the lakes, nature and scenery as one of the three things that came into their mind when thinking about Rotorua. There were 50% of respondents who mentioned geothermal activity, geysers and the smell as coming into their mind and 34.6% suggested the Maori culture. All other suggestions rated less than 30% and the comments given by respondents are listed below.

Comments coded to "lakes/nature/scenery/outdoors":

- Beautiful environment.
- Beautiful forests.
- Beautiful lakes.
- Beautiful scenery (x2).
- Environment.
- Forests (x7).
- Great non-native forests.
- Great outdoors.
- Green.
- Lake.
- Lakes, boating.
- Lakes (x29).
- Lakes/fishing.
- Natural.
- Open space.
- Outdoors - lots of things to do.
- Outdoors (x2).
- Pretty environment.
- Redwood Forest (x4).
- Scenery.
- The beautiful environment (lakes & bush).

- Unusual landscape, steam.
- Whaka[rewarewa] Forest.
- Wonderful lakes.
- Woods.

*Comments coded to “**geothermal activity/smell/geysers**”:*

- Geothermal activities.
- Geothermal activity.
- Geothermal features.
- Geothermal wonders.
- Geothermal (x11).
- Geysers (x2).
- Hot mud.
- Hot pools (x4).
- It is different, ie, thermal.
- Mud pools (x2).
- Mud.
- Mudpools, geysers.
- Rotten egg smell.
- Steam.
- Sulphur smell.
- Sulphur (x3).
- The smell (x7).
- The thermal activity.
- Thermal activity (x5).
- Thermal areas.
- Thermal attractions.
- Thermal spring.
- Thermal (x2).
- Unusual landscape, steam.

*Comments coded to “**Maori/Maori culture**”:*

- Cultural centre.
- Cultural.
- Culturally diverse.
- Culture.
- Lots of Maori touristy villages.
- Maori culture (x14).
- Maori people.
- Maori (x9).
- Maori's.
- Strong display of Maori culture.
- Strong Maori presence.
- The lakes (x3).
- The lakes/forest.

*Comments coded to “**attractions/activities/things to do**”:*

- Adventure tourism.
- Fantastic mountain biking.
- Fishing in our lake, forest walks.
- Forest (x4).
- Interesting location.
- Lakes, boating.
- Lakes/fishing.
- Lots of activities close by (x2).
- Lots of attractions.
- Lots to do (x2).
- Lots to do. Fun for the whole family.

- Lots to see.
- Mountain biking and triathlons.
- Mountain biking (x5).
- Outdoor activities (x2).
- Outdoor pursuits.
- Outdoor recreation.
- Outdoors - lots of things to do.
- Plenty to do.
- Recreation.
- Tourist activities.

*Comments coded to “**tourist destination**”:*

- Motels.
- Tourism town.
- Tourism (x11).
- Tourism/forestry.
- Tourist attractions.
- Tourist attractions.
- Tourist focussed.
- Tourists driving badly.
- Tourists (x4).

*Comments coded to “**central location**”:*

- Central city. A centre for great restaurants.
- Central locality.
- Central location (x4).
- Central to other locations in NZ.
- Central (x6).
- Centre of North Island.
- Closeness.
- Locality.
- Location (x3).
- Location/opportunities.

*Comments coded to “**attractive/clean town**”:*

- Attractive (x2).
- Attractiveness.
- Beautiful city (x2).
- Beautiful townscape.
- Beautiful (x2).
- Clean (x2).
- Government gardens.
- Nice town, gardens.
- Pretty city.

*Comments coded to “**family/friends/family history**”:*

- Family (x2).
- I live here.
- It’s my home (x8).

Comments coded to “shopping/economy”:

- \$10 economy.
- Average to poor economy.
- Cafes, eateries.
- Central city. A centre for great restaurants.
- Cool place to work.
- Empty shops in town.
- Forestry.
- Tourism/forestry.
- Work.

Comments coded to “crime”:

- Crime (x5).
- Maori youth crime.

Comments coded to “lifestyle”:

- Good lifestyle (x3).
- Lifestyle (x2).
- Opportunities for a good balance between work and social life.

Comments coded to “friendly people”:

- Friendly community.
- Friendly.
- The people.

Comments coded to “no traffic congestion”:

- Ease of travel.
- Great infrastructure without the clutter or difficulty in getting around.
- No traffic congestion.

Comments coded to “quiet”:

- Quiet (x2).
- The serenity.

Comments coded to “cheap property”:

- Reasonably priced housing.
- Value for money (property).

Comments coded to “weather/climate”:

- Crap weather compared to coastal BOP.
- Warm.

Comments coded to “other”:

- Convenient.
- Everything is close at hand.
- Expensive but relaxing.
- Good size.
- Great place for the weekend.
- Growing.
- Has great opportunities.
- Mind switches off.
- Networking.
- Nice for a visit.
- Not a place to have teenage kids.
- Not too crowded.
- Poor driving.
- Rough.

- Surface friendliness - hostile and mean-spirited underneath.
- Up and coming.

Respondents were asked when thinking about Rotorua as a place to live, work and learn, how they felt about each of the following aspects of Rotorua. Their responses are listed in the tables below.

Table 17 – Perceptions of geographic location

	Number	Percent
Excellent	54	51.9%
Good	42	40.4%
Average	7	6.7%
Poor	1	1.0%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

Over half of the respondents (51.9%) said that they enjoyed the proximity of Rotorua to other places while 40.4% said that the proximity was good. There was very little negative response to this question.

Table 18 – Perceptions of housing

	Number	Percent
Excellent	6	5.8%
Good	56	53.8%
Average	36	34.6%
Poor	5	4.8%
Very poor	0	0.0%
Don't know	1	1.0%
Not specified	0	0.0%
Total	104	100.0%

Although 53.8% of respondents said that housing in Rotorua was good, over a third (34.6%) said that it was average.

Table 19 – Perceptions of education

	Number	Percent
Excellent	7	6.7%
Good	39	37.5%
Average	34	32.7%
Poor	13	12.5%
Very poor	1	1.0%
Don't know	10	9.6%
Not specified	0	0.0%
Total	104	100.0%

Very few respondents thought that the education provision in Rotorua was excellent with most respondents 70.2% thought the provision was good or average. There were 12.5% who rated education provision in Rotorua as poor and 1% rated it as very poor.

Table 20 – Perceptions of healthcare

	Number	Percent
Excellent	10	9.6%
Good	52	50.0%
Average	33	31.7%
Poor	3	2.9%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	6	5.8%
Total	104	100.0%

Over half of the respondents (59.6%) thought that the healthcare provision in Rotorua was good or excellent. There were 31.7% who thought it was average and only 2.9% thought it was poor.

Table 21 – Perceptions of infrastructure

	Number	Percent
Excellent	7	6.7%
Good	59	56.7%
Average	27	26.0%
Poor	7	6.7%
Very poor	2	1.9%
Don't know	1	1.0%
Not specified	1	1.0%
Total	104	100.0%

There was a positive response to infrastructure in Rotorua with 56.7% of people rating it as good. There were less than 10% of respondents who rated infrastructure as poor or very poor.

Table 22 – Perceptions of safety

	Number	Percent
Excellent	5	4.8%
Good	30	28.8%
Average	44	42.3%
Poor	21	20.2%
Very poor	4	3.8%
Don't know	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

A third of respondents (33.6%) rated their perception of safety in Rotorua as good or excellent, while 42.3% of respondents rated it as average. The remainder (24.0%) of respondents thought safety in the area was poor (20.2%) or very poor (3.8%).

Table 23 – Perceptions of employment opportunities

	Number	Percent
Excellent	7	6.7%
Good	34	32.7%
Average	41	39.4%
Poor	20	19.2%
Very poor	0	0.0%
Don't know	1	1.0%
Not specified	1	1.0%
Total	104	100.0%

There was a mixed response to employment opportunities in Rotorua with 39.4% of people who thought the opportunities were average. There were another 39.4% who thought the opportunities were good (32.7%) or excellent (6.7%) and 19.2% who thought they were poor.

Table 24 – Perceptions of community spirit

	Number	Percent
Excellent	8	7.7%
Good	47	45.2%
Average	39	37.5%
Poor	6	5.8%
Very poor	1	1.0%
Don't know	0	0.0%
Not specified	3	2.9%
Total	104	100.0%

Just over half of the respondents (52.9%) thought that the community spirit in Rotorua was good or excellent and 37.5% thought the community spirit was average.

Table 25 – Perceptions of Events/Activities/Entertainment

	Number	Percent
Excellent	22	21.2%
Good	41	39.4%
Average	27	26.0%
Poor	11	10.6%
Very poor	3	2.9%
Don't know	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

There was a positive response to the question on events, activities and entertainment with 60.6% of people rating this aspect of Rotorua good or excellent.

Table 26 – Perceptions of weather/climate

	Number	Percent
Excellent	8	7.7%
Good	56	53.8%
Average	33	31.7%
Poor	6	5.8%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

Over 50% of respondents thought the weather and climate in Rotorua was good while 31.7% of respondents thought it was average. Only 5.8% of respondents thought the weather and climate were poor.

Table 27 – Perceptions of the tourism industry

	Number	Percent
Excellent	42	40.4%
Good	47	45.2%
Average	14	13.5%
Poor	0	0.0%
Very poor	0	0.0%
Don't know	1	1.0%
Not specified	0	0.0%
Total	104	100.0%

The tourism industry in Rotorua received a favourable response with 85.6% of respondents who thought it was excellent or good. No respondents thought that the tourism industry was poor or very poor.

These additional comments were made:

- Employment opportunities for partners very limited.
- I dislike the way many of the tourist attractions charge a very high price, ie, what they think they can screw out of rich Americans rather than applying a rate that is in keeping with the economic structure of New Zealand.
- I don't live in Rotorua - visit for networking and training seminars.
- I scored entertainment as average because I think there is a shortage and narrow range of concerts/theatre events. Public transport could also be improved in terms of range of services/times.
- I think that Rotorua is extremely let down by its crime rate.
- I think the bus system is heaps better now.
- I'd like to see Rotorua's "second cousin" (to Taupo or Tauranga) overturned somehow.
- Infrastructure probably overdone to the detriment of other social and amenity services.
- It is a very expensive city to live in. Even housing is now getting out of the reach of middle New Zealand, with not the same business and job opportunities to go with it.
- It's an average environment. That's the problem.
- Never know when events are on - poor advertising. Seem to need to have lived here for ten years+ before you are invited to join in.
- Not enough higher level jobs. More large concerts wanted.
- Not enough night life.
- Only main concern for me is education standards, am thinking about sending kids to private school or moving towards Hamilton for better education opportunities for children.
- Petty crime is an issue, as are social issues, ie, poverty, crime.
- Rotorua has a vast amount of potential - but it is a dreary little place and no-one really cares about the tourists - just want their money and make a quick buck... especially compared to other similar resort towns like Queenstown.
- Rotorua misses out on shows and performances.
- Rotorua seems to be dragged down by probably about 5% of the population, and organised events - most are excellent but some are pathetic like the New Years Eve event was just plain crap.
- Tourism is falling behind other centres because of old fashioned marketing methods. Does RDC really need to control marketing? Would it be better off in private enterprise?
- Tourism is falling behind other centres. Old fashioned marketing methods. Does RDC really need to control marketing? Would it be better off in private enterprise?
- Town is dead on Sunday, a lot of traffic but no shops open, we need a big Sunday market like Takapuna in Auckland when that shuts at midday the shops open, in the centre of town, eg, a farmers market. The lakefront craft market is okay but there is nothing in town to supplement it.
- Very disappointed to see that the new airport has a "drop-off" zone only and a man driving around in a motorised scooter telling people to move if they are waiting to pick people up. If you are only there for five minutes think this looks greedy making people pay, and leaves a sour taste in the mouth of arrivals. Have a number of people comment over the worlds that they have never seen this anywhere else in the world.
- We need to realise that Rotorua is a holiday destination and people are in holiday mode and need to be treated so, not in a starchy formal manner. Be happy!!

Respondents were asked what perceptions they had about the following types of education in Rotorua. Their responses are listed in the tables below.

Table 28 – Perceptions of early childhood education quality (0-5 yrs)

	Number	Percent
Extremely positive	17	16.3%
Positive	39	37.5%
Average	34	32.7%
Negative	1	1.0%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	13	12.5%
Total	104	100.0%

Over half of respondents thought the perceptions of early childhood education was positive or extremely positive (53.8%). A further 32.7% thought they were average. Only one respondent (1.0%) had any negative perceptions about early childhood education in Rotorua.

Table 29 – Perceptions of primary education quality (5-12 yrs)

	Number	Percent
Extremely positive	10	9.6%
Positive	44	42.3%
Average	31	29.8%
Negative	6	5.8%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	13	12.5%
Total	104	100.0%

Most respondents (51.9%) reported positive or extremely positive perceptions of the quality of primary education in Rotorua. A further 29.8% of respondents thought this education was average. A small percentage (5.8%) had negative perceptions on primary education in Rotorua.

Table 30 – Perceptions of secondary education quality (13-18 yrs)

	Number	Percent
Extremely positive	5	4.8%
Positive	37	35.6%
Average	34	32.7%
Negative	16	15.4%
Extremely negative	1	1.0%
Don't know	0	0.0%
Not specified	11	10.6%
Total	104	100.0%

Perceptions of secondary education were slightly less than those of primary and early childhood with under half (40.4%) of respondents saying that the quality was positive or extremely positive and a further 32.7% rating perceptions as average. Secondary education quality perceptions were negative or extremely negative for 16.4% of respondents.

Table 31 – Perceptions of tertiary education quality

	Number	Percent
Extremely positive	3	2.9%
Positive	18	17.3%
Average	46	44.2%
Negative	23	22.1%
Extremely negative	5	4.8%
Don't know	0	0.0%
Not specified	9	8.7%
Total	104	100.0%

Perceptions of tertiary education were rated the lowest of the four educational areas. A fifth of respondents rated perceptions as positive or extremely positive (20.2%) of respondents, while 44.2% rated it as average. Over a quarter (26.9%) of respondents rated perceptions as negative (22.1%) or extremely negative (4.8%).

Respondents were asked what perceptions they had about housing in Rotorua. Their responses are listed in the tables below.

Table 32 – Perceptions of housing quality

	Number	Percent
Extremely positive	4	3.8%
Positive	36	34.6%
Average	54	51.9%
Negative	7	6.7%
Extremely negative	2	1.9%
Don't know	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

Most respondents were happy with the perception of housing quality in Rotorua with 90.3% responding with average, positive or extremely positive ratings. Some respondents (8.6%) were not happy, reporting negative or extremely negative perceptions.

Table 33 – Perceptions of housing affordability

	Number	Percent
Extremely positive	15	14.4%
Positive	47	45.2%
Average	29	27.9%
Negative	10	9.6%
Extremely negative	1	1.0%
Don't know	0	0.0%
Not specified	2	1.9%
Total	104	100.0%

The majority of respondents (87.5%) had an average to extremely positive perception of housing affordability in Rotorua although some respondents (10.6%) did report having negative perceptions.

Table 34 – Perceptions of housing proximity to amenities

	Number	Percent
Extremely positive	22	21.2%
Positive	65	62.5%
Average	15	14.4%
Negative	0	0.0%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	2	1.9%
Total	104	100.0%

All respondents were happy with housing proximity to amenities in Rotorua.

Respondents were asked what perceptions they had about living in Rotorua. Their responses are listed in the tables below.

Table 35 – Perceptions of sports facilities

	Number	Percent
Extremely positive	18	17.3%
Positive	56	53.8%
Average	25	24.0%
Negative	3	2.9%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	2	1.9%
Total	104	100.0%

Most respondents (71.1%) reporting positive (53.8%) or extremely positive (17.3%) perceptions regarding sports facilities. A further 24.0% had an average perception and only 2.9% reported negative perceptions.

Table 36 – Perceptions of cultural activities

	Number	Percent
Extremely positive	24	23.1%
Positive	48	46.2%
Average	22	21.2%
Negative	9	8.7%
Extremely negative	1	1.0%
Other	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

Most respondents were positive about cultural facilities in Rotorua with 69.3% having a positive or extremely positive response. A further 21.2% of respondents reported an average perception while 9.7% reported negative or extremely negative perceptions.

Table 37 – Perceptions of social groups

	Number	Percent
Extremely positive	10	9.6%
Positive	44	42.3%
Average	41	39.4%
Negative	7	6.7%
Extremely negative	1	1.0%
Other	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

Most respondents (91.3%) were happy with social groups in Rotorua giving a rating or average or higher. A small percentage (7.7%) reported negative ratings.

Table 38 – Perceptions of outdoors environment and access

	Number	Percent
Extremely positive	74	71.2%
Positive	25	24.0%
Average	4	3.8%
Negative	0	0.0%
Extremely negative	1	1.0%
Other	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

Nearly all respondents (95.2%) rated access to the outdoors environment as positive (24.0%) or extremely positive (71.2%).

Table 39 – Perceptions of healthcare

	Number	Percent
Extremely positive	3	2.9%
Positive	58	55.8%
Average	38	36.5%
Negative	4	3.8%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

Most respondents (95.2% had a positive response to the healthcare available in Rotorua with rating of average or higher given. Only 3.8% had a negative perception of Rotorua's healthcare.

Respondents were asked what perceptions they had about working in Rotorua. Their responses are listed in the tables below.

Table 40 – Perceptions of wage rates

	Number	Percent
Extremely positive	4	3.8%
Positive	18	17.3%
Average	74	71.2%
Negative	7	6.7%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

Most respondents had favourable perceptions of wage rates in Rotorua with 92.3% reporting average (71.2%), positive (17.3%) or extremely positive ratings (3.8%).

Table 41 – Perceptions of career progression

	Number	Percent
Extremely positive	7	6.7%
Positive	22	21.2%
Average	49	47.1%
Negative	24	23.1%
Extremely negative	2	1.9%
Other	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

Just under half of the respondents (47.1%) had an average perception of career progression possibilities in Rotorua. Slightly over a quarter of respondents (27.9%) had positive perceptions while a quarter (25%) had negative perceptions.

Table 42 – Perceptions of transport links to the city

	Number	Percent
Extremely positive	10	9.6%
Positive	56	53.8%
Average	30	28.8%
Negative	6	5.8%
Extremely negative	1	1.0%
Other	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

Most respondents (63.4%) had a positive or extremely positive perception of transport links to the city in Rotorua.

Table 43 – Perceptions of roading

	Number	Percent
Extremely positive	7	6.7%
Positive	47	45.2%
Average	44	42.3%
Negative	5	4.8%
Extremely negative	1	1.0%
Other	0	0.0%
Not specified	0	0.0%
Total	104	100.0%

Most respondents were happy with roading in Rotorua with (94.2%) indicating roading was average or better.

Table 44 – Perceptions of the business environment

	Number	Percent
Extremely positive	3	2.9%
Positive	44	42.3%
Average	46	44.2%
Negative	10	9.6%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	1	1.0%
Total	104	100.0%

The majority of respondents (89.4%) thought that the business environment was average or better in Rotorua. A further 9.6% had a negative perception of the business environment.

Respondents were asked if there were three things to improve Rotorua as a good place to live, work and learn; what would you do. Their responses are listed in the table below.

Table 45 - Suggested improvements

	Number	Percent
Crime/youth/negative image/safety	33	31.7%
Education	28	26.9%
Town improvements	24	23.1%
Jobs/employment/business	18	17.3%
Community wellbeing/spirit	12	11.5%
Other infrastructure improvements	11	10.6%
Community/sport activities/events/arts	10	9.6%
Council/rates	9	8.7%
Environment/clean lakes/rubbish	8	7.7%
Public transport	7	6.7%
Retail improvements	5	4.8%
Airport	3	2.9%
Attraction/event improvements	2	1.9%
Parking	2	1.9%
Other	13	12.5%
Sample	104	

Note: Not additive as respondents could identify multiple improvements

The four most popular responses for this question were crime/youth/negative image safety, education, town improvements and jobs/employment and business. Comments pertaining to each category in the table are listed below.

Suggested improvements coded to "crime/youth/negative image/safety"	Reason
Address the poverty and crime issues via culturally enduring solutions. Better facilities for our young people.	
Change New Zealanders' perception of Rotorua from the outside looking in. Clean up the safety issues.	Do something for the youth. Hanging around town gives a bad impression.
Clean up the unsavoury and criminal element, create a culture of not here.	
Cut out crime in CBD.	
Get police to move on groups of unsavoury characters in town.	
Get rid of the crime capital image.	
I can only think of one main thing which would improve Rotorua, and that is to lower the crime rate.	I do not know how, but both people who live within and outside Rotorua feel it is not a safe place to live as the crime is so high.
Improve crime/social issues.	
Improve law and order.	
Improve safety ie, reverse negative image.	
Improve safety.	
Improve the image of Rotorua nationally.	
Improve the perception of Rotorua as a 'rough' and unsafe place to live.	
Keep the dropouts you see around hanging around the central business area.	
Get rid of McDonalds and the riff raff will follow.	
Make it a safer place ie, less burglaries of locals and tourists.	
More activities for teenage youth.	
More police on the beat in town.	
Much tougher crime control.	
Personal safety.	
Reduce crime rates.	
Reduce crime.	
Reduce crime/more police.	
Reduce gang issues.	
Reduced crime rate (of all sorts).	
Remove 'bums' from inner city.	

Idea	Reason
<p>Safer CBD/tourist spots. Safety in the town centre by reducing young group gatherings for trouble, mainly by McDonalds and by the Warehouse area. They can be extremely intimidating, rude and utterly gross most times which lead to fighting generally.</p>	<p>Greater consultation by RDC/TAB with sector by sector tourism.</p>
<p>Safety. Both roads and violence. Spend more time advertising the good things. Not focusing on the negative which gives us a bad name nationally.</p>	<p>Too many logging trucks etc, and too many "hoods" on the streets.</p>
<p>Try and diminish the amount of young people who just seem to hang around town, often there when they should be at school. Introduce harsher penalties for wagging and offer alternative education, ie, a sports college. That's the only one I can think of.</p>	
<p>Work on improving safety perceptions to counter current negative perceptions out there.</p>	

Suggested improvements coded to "education"

Idea	Reason
A university!	Students move away to study, often don't come back.
Better polytech.	
Champion the Waiariki Institute as a premier learning institution.	
Community education programmes.	Night school very limited. Get a high school to start night school classes.
Education.	Learning is jeopardised by unruly students in most classes - get tough.
Establish university. Improve housing quality/reduce infill housing.	
Give Waiariki Institute of Technology a good shake up.	They are losing supporters by the truck load.
Have a university or a branch of a university.	
Higher quality secondary education.	
Improve discipline within the school system.	
Improve education standards.	
Improve intermediate and college facilities (with the odd obvious exceptions).	
Improve quality of education.	
Improve research and development links with tertiary providers.	
Increase education.	
Introduce a private school.	
Invest time and support into education locally at all levels to improve outcomes.	
It would be nice to see the polytech more settled as they seem to be always chopping and changing courses, making staff redundant and changing leadership.	
Learning levels available are low; need better scope eg, like university towns have.	
Learning wise Polytech here seems to have a rather bad name for courses that are supposed to cross credit but don't and revenue gathering courses, offering incentives to register but no need to turn up.	
Make Waiariki a more desirable place to study.	
More educational opportunities. Options for primary/secondary school children.	
More tertiary education facilities.	
Reduce number of training establishments.	
Reduce the number of training establishments.	
Scrap the Wananga.	
Spend more money on the polytechnic. Make more subjects available and you should attract more young people to Rotorua.	
The polytechnic.	

Suggested improvements coded to "town improvements"

Idea	Reason
Beautify lakefront area.	
Beautify the city focus area.	
Beautify the non-posh areas of Rotorua, ie, Western Heights, Ford block, and improve the roading in these areas.	Springfield and Lynmore have nice roads and nice verges etc, but other Rotorua areas look crappy, plus the roads are in really bad shape and when there are roadworks they don't even sweep the road afterwards - have a look on Homedale.
Better urban design, ie, town centre.	Overall Rotorua lacks energy compared to other towns in New Zealand, like Nelson, Napier etc.
Build more cycle lanes and cycle lock up facilities in town as more people would take their bikes to town if we had a covered lockable bike storage that would make Rotorua more bike friendly.	
Clean up our lakes.	
Control the subdivisions on the skyline and around the city to retain the current 'green' feel.	
Develop the city further including the lakefront and make this the 'in' place to work and live.	
Develop the lakefront.	
Encourage business back into city centre, not the mall (which should be covered so good in wet weather).	
Encourage businesses to move back into the city centre.	
Enlarge library.	
Establish a 'heart' to the city where people want to be seen.	
Get an enclosed mall.	The current mall situation and large shopping centre doesn't compare to shops all under the once roof in an all weather environment.
Get rid of the tatty craft market which is just another place to hock off cheap imported crap.	It is a very bad look for Rotorua - alternatively relocate to an industrial area and improve the lakefront urgently.
Improve CBD.	
Improve visual appearance of transport corridors (eg, Fairy Springs Rd and Te Ngae Rd - too many signs and not enough trees).	
Local business pride in the streetscapes - I arrived ten years ago, and the streets were being terracotta paved, and there were new plantings and gardens. We were excited to live in such a go-ahead place - but nothing has happened to enhance the inner city since.	
Make CBD 'hum' more.	At present there are too many empty shops, need to attract more specialist retailers.
More vibrant CBD in the evening and night time.	

Idea	Reason
Provide better structure to CBD area.	
Remove glass (and rubbish) from the streets more frequently.	
Revitalise the CBD.	
Upgrade and modernise the CBD.	
Idea	Reason
Suggested improvements coded to "jobs/employment/business"	
Better retail environment.	
Better shopping facilities ie, a decent mall undercover. A shopping mall is needed at Ngongotaha as this is a growth area.	
Better shopping.	
Create more professional employment.	
Create wealth to increase the size of the pie - do that and creating high value jobs.	
Develop a real shopping mall.	
Develop new industrial area away from the immediate vicinity of the lake, eg, to the south and west of Hemo Gorge.	
Don't subscribe to the Daily Post. My impression of the city increased dramatically when I didn't read the negativity of the articles or read the dribble that the usual twats write in the letters to the editor. More development in the CBD to bring new businesses into the middle of town. It is looking tired . School holidays are not pleasant with the congregation of youngsters around town. Don't give them anything to come to town for. Develop the lakefront area, cafes etc, to be vibrant. We currently have a tired old cafe and circus at the village green resulting in the congregation of said elements from previous point.	
Encourage corporate offices to relocate to Rotorua.	
Encourage incentives for light industry to relocate to Rotorua.	
Fill some of the empty shops in town (better shops, less chain stores - the café scene is good).	
Increase business.	
Invest in a mall in the central city - reuse the old Farmers building - I mean a covered, walkthrough mall, not the RCM megastore concept that is not working for the city at all.	
More diversity of industry, therefore more job opportunities.	
More larger companies.	
Retailers open longer than 1700 hours.	
Retailers should open longer than 5.00pm.	

Idea	Reason
Stop business drifting out of the CBD eg. increase the number of businesses now located on the western side of Old Taupo Road opposite RBHS. Encourage vacant shops/office in the CBD to be filled.	
Suggested improvements coded to "community wellbeing/spirit"	
Idea	Reason
A lot of the negatives are to do with size - you simply don't have a lot of social opportunities in a small place, likewise size limits size of companies which limits career opportunities. We moved here for lifestyle and careers are secondary and I think most people who live here feel like that. It was really difficult to find a doctor here (overcrowded).	
Ban smoking in public places - when I think of going to town, I think of inhaling all that smoke as I walk down the street.	
Build stronger values (the gaps between the haves and have nots needs bridging).	Build a stronger sense of community. Rotorua does not project itself as a city that knows its place and its future.
Conduct a local "feel proud and positive" campaign about Rotorua.	Run an external strategic PR campaign to achieve increased awareness, and change negative perceptions (especially addressing negative stereotypes around Maori low socio-economic issues such as crime).
Create stronger community identity (besides tourism).	
Deliver a more positive message by working with local paper to generate a good feel. Encourage more businesses to locate here by offering incentives.	
Foster community spirit especially between Maori and non-Maori (reverse racism is rampant in Rotorua, especially in schools).	
Have locals more proud of their city.	
Make locals more proud of their city.	
More community spirit.	
Promote projects that will rally the people behind the city ie, adopting a lake as part of the vital lakes clean-up campaign.	
Through an incentive scheme (not sure how) in impoverished areas, promote community spirit/well-being to better the area and the people living there.	

Suggested improvements coded to "other infrastructure improvements"

Idea	Reason
Better links with the rest of New Zealand.	Develop more commercial activity based on strategic central location for Rotorua. Get away from constant focus on tourism and forestry. Need new directions.
Build another swimming pool and cover the outside 50m pool. Eliminate signage clutter along the Fairy Springs arrival access. Improve roading to Rotorua from surrounding cities. Improve roading.	Pool usage has increased with swimmers and water polo. This means that the public get less space and they get grumpy. The outside pool needs covering especially during the summertime when there is so much sun. The RDC needs to be more proactive with shade protection as what they provide now is totally inadequate at certain times of the day as the sun moves around. Even schools provide more protection. More permanent higher seating is needed inside at the 25m pool as well for watching water polo games and at swimming meets to be able to see more of the action.
Improve the arterial link through Lynmore and Owkata. This takes all the traffic from the south to the east through 50k roads past two primary schools. Improve the quality and safety of roads in the district. Roads in the district are of poor quality due to the coarse chips used for reforming roads. I notice that it is very loud driving cars in the district, also due to the coarse chips. Also, as a cyclist, these roads are uncomfortable, and they are also very unsafe due to the bad driving habits of motorists. I notice the initiative, "Don't disturb their bubble" which is applaudable and should be continued. Keep improving bike lanes. More walkways and cycle tracks away from the roads. Special cycle ways. Upgrade the hospital.	

Suggested improvements coded to "community/sport activities/events"

Idea	Reason
Better support of the arts. Create cheap things to do for locals, especially targeting teenagers, but also things for families to do together cheaply (all the touristy things in Rotorua are too expensive for locals to do. Take those away and all you have left is shopping and getting in trouble. Develop network of cycle/mountain bike/walkway trails making it far easier and safer to access than currently is the situation. Extend theatres/concerts.	

Idea	Reason
Increase the number and improve the standard of musical and theatrical performances held locally - make sure there's always something on and make sure that people know about it.	
Increased events held here.	
More social events.	
Promote more big events (sports etc) even if at a cost to the RDC. The income will outlay any spend.	
Promote outdoor recreation opportunities as a whole plethora of different activities free access to fully commercial for all abilities, all readily accessible.	Change public perception out there that Rotorua is an unsafe destination more so than other centres in New Zealand as the wrong and incorrect message is getting out there.
Reduce prices of activities for locals.	
Suggested improvements coded to "Council/rates"	
Idea	Reason
Don't let council waste money on the airport and events centre.	
Get council to support the cycling community - leverage the current popularity.	
Have a Council that is progressive rather than negative. Have a more positive and encouraging attitude to investment by the Council. Stop all the PC in the Council and respect who is paying their wages, ie, the ratepayers!!	
Justify rates.	
Lower rates.	
RDC to solve the very high rate issue.	
Reduce council spending on 'white elephants'. Reduce rates and enforce building regulations. Reduce compliance costs and regulatory fees. Convince the government to treble the police commitment to Rotorua to facilitate a safe, clean welcoming environment for tourists rather than the experience of sullen groups of foul mouthed Maori youths smoking and blocking public accessways before stealing their bags and cellphones.	Rotorua's high rates are a negative aspect which could be reduced by less spending on large facilities which are under used and ratepayer subsidised. Take more urgent steps to improve water quality in the lakes, especially Lake Rotorua.
Replace the council and restructure RDC with a more appropriate structure for the 21st century.	

Suggested improvements coded to “environment/clean lakes/rubbish”

Idea	Reason
Completion of the proposed predator-proof fencing and development of the Mt Ngongotaha bush.	
Curb-side recycling on rubbish days as not everybody has the time to go to the recycle facilities in town you would find that the dumping of rubbish on Mt Ngongotaha and around town will decrease.	
Environmental improvement - particularly the lakes.	
Establish Rotorua as international centre of renewable energy excellence (part of sustainable living lifestyles).	
Keep Rotorua as green as possible.	
Promote Rotorua as an Eco City to get in on "Green Brigade" tourism and lifestyle residents.	
Seek to invest in economic development that diversifies the region's economy in an environmentally safe manner.	
Tidier roadsides.	Lots of glass, also rubbish, though I know its regularly cleaned up, change in community attitude/pride is needed.

Suggested improvements coded to “public transport”

Idea	Reason
Bus stops in the mall by the Warehouse as the bus stop in Pukuatua Street can be far to go with shopping in winter and the crossing over the road by the lights can be busy and cold in Winter.	
Extend public transport links.	
Extend the area serviced by the local bus service.	
Improve public transport.	
Integrated walking/cycling/public transport networks.	
Promote alternatives to driving.	
Promote and plan other transport systems to prevent future congestion as in other big cities.	

Suggested improvements coded to "retail improvements"	
Idea	Reason
Change real estate agents' deceptive practices.	
Get the business community to buy into a culture of decent customer service - its woeful.	
Improve shop assistants attitudes.	
Improve wages.	
Not qualified to say as I don't live there - but seems a great town as it is. More publicity of café scene?	
Suggested improvements coded to "airport"	
Idea	Reason
Airport (not international) building as a showcase for local materials and technologies.	
Get an international airport.	
Transtasman airport.	
Suggested improvements coded to "attraction/event improvements"	
Idea	Reason
Better advertising of events.	
Develop city lakefront into a world class attraction which would provide impetus for major private development that would make lakefront an attraction in its own right.	
Suggested improvements coded to "parking"	
Idea	Reason
Increase library parking by making the centre parking in Haupapa St outside Community House one or two hour parks.	This would increase turnover of these parks giving library patrons a chance to park there as at the moment these parks are used by people that park there all day therefore no park turnover until around 5pm weekdays. Some books can be really heavy to carry any distance.
Reduce airport parking charges, this would encourage more patronage.	\$10 a day for a provincial airport is a rip-off.

Suggested improvements coded to "other"

Idea	Reason
Allow dogs on leads in town.	
Better geothermal recreational facilities for local people.	Something similar to Butcher's Pool but close to town or in town.
Combined marketing.	
Improve cycling safety on roads.	
Keep housing affordable by Rotorua's standards, not Auckland's, otherwise people will leave Rotorua to find jobs where they can afford their own house.	
Keep tourists on left side of the road.	
Lower rental.	Rent does not reflect property prices.
Model the poorer performing arts schools on the successful ones.	
More environmental and social community schemes like hire-a-bike; kerbside recycling; city festivals etc. My family are seriously considering moving out of Rotorua, as in ten years, we have not made a "home" here - the place is still feeling like a rural backwater, it is going backwards in terms of retail and attracting shows and tourists and there is a lack of action and desire from the council and citizens in improving the state of Rotorua very sad.	
Open up more out of area access.	
Provide financial benefits to the employees, eg, shares in business.	
Smokefree city or at least all public places.	
Work together with the strategic and regional direction New Zealand is taking - not against it.	

Table 46 – Respondent occupations

	Number	Percent
Retired	1	1.0%
Unemployed	1	1.0%
Admin & clerical	14	13.5%
Managerial worker	13	12.5%
Professional & technical	56	53.8%
Student	0	0.0%
Homemaker	0	0.0%
Agriculture, forestry and fishing	7	6.7%
Service worker	5	4.8%
Other	7	6.7%
Not specified	0	0.0%
Total	104	100.0%

Over 50% of respondents said that they were from a professional or technical occupation.

Other specified:

- Business owner/operator.
- Fiber Artist.
- Landlord.
- Science research.
- Self employed (x3).

A total of 54.8% of respondents to the survey were female and 38.5% were male.

Table 47 - Gender

	Number	Percent
Male	40	38.5%
Female	57	54.8%
Not specified	7	6.7%
Total	104	100.0%

The most popular age group of respondents to this survey were between 40-49 years. However there was quite a mix of age groups in total.

Table 48 – Respondents age groups

	Number	Percent
16-20	0	0.0%
21-29	15	14.4%
30-39	24	23.1%
40-49	35	33.7%
50-59	17	16.3%
60-69	10	9.6%
70+	1	1.0%
Refused	0	0.0%
Not specified	2	1.9%
Total	104	100.0%

A total of 90.4% of respondents to this survey lived in the Waikato/Bay of Plenty/Rotorua.

Table 49 – Respondent locations

	Number	Percent
Auckland/Northland	2	1.9%
Canterbury	2	1.9%
Otago	0	0.0%
Wellington	0	0.0%
Waikato/Bay of Plenty/Rotorua	94	90.4%
West Coast	0	0.0%
Hawke's Bay/Gisborne	0	0.0%
Marlborough/Nelson/Tasman	0	0.0%
Taranaki/Manawatu/Wanganui	2	1.9%
Southland	0	0.0%
Overseas	2	1.9%
Other	0	0.0%
Not specified	2	1.9%
Total	104	100.0%

Overseas specified:

- France
- Perth, Australia.

The length of time that respondents had lived in the area they specified is listed in the table below. The most common response was 1-5 years.

Table 50 – Respondents time in their location

	Number	Percent
Less than 1 year	5	4.8%
1-5 years	31	29.8%
6-10 years	18	17.3%
11-15 years	14	13.5%
16-25 years	17	16.3%
26-50 years	15	14.4%
50 years +	2	1.9%
Refused	0	0.0%
Not specified	2	1.9%
Total	104	100.0%

A total of 76.0% of respondents who answered this survey identified themselves as NZ European/Pakeha.

Table 51 – Respondents ethnic groups

	Number	Percent
NZ European/Pakeha	79	76.0%
Asian	2	1.9%
NZ Maori	0	0.0%
NZ Maori & Pakeha	9	8.7%
Pacific Island	0	0.0%
Other	7	6.7%
Refused	2	1.9%
Not specified	5	4.8%
Total	104	100.0%

7.1 Key points from the online survey – live, work and learn:

- The online survey revealed that the first three perceptions of Rotorua that come to mind are:
 - Lakes/nature/scenery/outdoors
 - Geothermal activity/smell/geysers
 - Maori culture
- The geographic location of Rotorua was rated as good or excellent by online survey respondents.
- Rotorua's tourism industry was rated as good or excellent by 85.6% of online respondents.
- Most respondents (91.3%) reported healthcare as being average or better.
- Housing and the weather/climate were rated good to average.
- Infrastructure was rated as poor by 8.6% of respondents while 89.4% rated it as average or better.
- Safety was rated as poor by 24% of respondents.
- Employment opportunities were rated as poor by 19.2% of online respondents.
- Most respondents (90.4%) rated community spirit as average or better.
- The majority of respondents reported an average or greater perception of early childhood education and primary education in Rotorua.
- Most respondents (73.1%) rated their perception of secondary education as average or better but 16.4% had negative perceptions.
- Most respondents rated tertiary education as average or better (64.4%), but 26.9% rated their perception of tertiary education in Rotorua as negative or very negative.
- With regards to housing, most respondents were satisfied with the quality and affordability of houses in Rotorua. People were very satisfied with the proximity of houses to amenities.
- The majority of online respondents reported average to extremely positive perceptions of sports facilities and cultural facilities in Rotorua.
- Most respondents had average or better perceptions of the relationships between social groups in Rotorua.
- Nearly all respondents (99.0%) were satisfied with Rotorua's outdoor environment and their access to the outdoors with most respondents (71.2%) having an extremely positive perception.
- A total of 95.2% of online survey respondents rated healthcare as average or better.
- A total of 92.3% of respondents had an average or better perception of wage rates in Rotorua with the majority (71.2%) rating them as average. There were 6.7% who had a negative perception of wage rates.
- Just under half (47.1%) of online survey respondents had an average perception of career progression in Rotorua and 25.0% had a negative or extremely negative perception.
- Most respondents had a positive perception of transport links to the city and roading.
- Most respondents had a positive perception of Rotorua's business environment but 9.6% of respondents reported a negative perception.
- The three things online survey respondents wanted improved was:
 - Crime/youth/negative image/safety
 - Education
 - Town improvements

8.0 FACE TO FACE SURVEY

A total of 60 live, work and learn surveys were undertaken with both domestic visitors to Rotorua (43.3%) and international visitors to Rotorua (56.6%).

For every survey administered for this project the first question asked of respondents was “When thinking about Rotorua, what are the first three things that come to mind? As respondents could identify multiple aspects of Rotorua the overall results for this table do not add to 100%. ‘Geothermal activity/smell/geysers’ was the most common factor associated with Rotorua (121.0%), followed by ‘lakes/nature/scenery’ (60.0%) and ‘attractions/activities’ and ‘Maori culture’ (both with 28.3%). Other aspects associated with Rotorua included ‘tourist destination’, ‘family and friends’ and ‘friendly people’. Comments specified by respondents included “clean place”, “close to Auckland”, “beautiful landscape” and “mountain bike tracks”. (Refer to 16).

Table 52 – Initial perceptions of Rotorua

	Number	Percent
Geothermal activity/smell/geysers	73	121.7%
Lakes/nature/scenery	36	60.0%
Attractions/activities	17	28.3%
Maori culture	17	28.3%
Tourist destination	7	11.7%
Family/friends	5	8.3%
Friendly people	3	5.0%
Other	16	26.7%
Sample	60	

Note: Not additive as respondents could identify multiple things

Respondents were then asked to rate their perceptions of different aspects of Rotorua on a scale of 1-5 (ie, extremely positive, positive, average, negative or extremely negative). A total of 53.3% had either an extremely positive or positive perception of the geographic location of Rotorua; a further 33.3% had an average perception about the geographic location. Only three respondents (5.0%) had a negative perception of the geographic location of Rotorua. (Refer to 17).

When asked about their perception of housing in Rotorua, 31.7% of respondents had an extremely positive or positive perception, a further 16.7% had an average perception of housing and 5.0% had a negative perception. It is important to note that 27 respondents (45.0%) did not know about housing in Rotorua and therefore did not give a perception rating.

As expected a large proportion of visitors (75.0%) did not have a perception of education in Rotorua, however 15.0% gave an extremely positive or positive rating of education. A further two respondents (3.3%) had a negative perception of education.

Over one-quarter of visitors (28.3%) had an extremely positive or positive perception of healthcare in Rotorua. Five respondents (8.3%) had an average perception and 38 respondents (63.3%) did not know. (Refer to Table 17).

Table 53 – Visitors perceptions of Rotorua’s geographic location, housing, education, healthcare

	Geographic location		Housing		Education		Healthcare	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Extremely positive	6	10.0%	3	5.0%	1	1.7%	3	5.0%
Positive	26	43.3%	16	26.7%	8	13.3%	14	23.3%
Average	20	33.3%	10	16.7%	3	5.0%	5	8.3%
Negative	3	5.0%	3	5.0%	2	3.3%	0	0.0%
Extremely negative	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Don't know	5	8.3%	27	45.0%	45	75.0%	38	63.3%
Not specified	0	0.0%	1	1.7%	1	1.7%	0	0.0%
Total	60	100.0%	60	100.0%	60	100.0%	60	100.0%

Visitors perceptions of Rotorua infrastructure was three-quarters (75.0%) positive or extremely positive. A further 15.0% had an average perception of the infrastructure in Rotorua, 3.3% had a negative perception and 6.7% did not know.

Half of the visitors surveyed (50.0%) had a positive perception of safety in Rotorua, while a further 16.7% had an extremely positive perception. A total of 11.7% had a negative perception of safety and 13.3% did not know.

Almost three-quarters of visitors did not know about employment opportunities in Rotorua, 5.0% had a negative or extremely negative perception, while 15.0% had a positive or extremely positive perception of employment opportunities in Rotorua.

A total of 66.7% of visitors surveyed had a positive or extremely positive perception of Rotorua’s community spirit, while 33.3% did not know.

Table 54 – Visitors perceptions of Rotorua’s infrastructure, safety, employment opportunities, community spirit

	Infrastructure		Safety		Employment opps.		Community spirit	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Extremely positive	8	13.3%	10	16.7%	2	3.3%	9	15.0%
Positive	37	61.7%	30	50.0%	7	11.7%	31	51.7%
Average	9	15.0%	5	8.3%	4	6.7%	0	0.0%
Negative	2	3.3%	7	11.7%	2	3.3%	0	0.0%
Extremely negative	0	0.0%	0	0.0%	1	1.7%	0	0.0%
Don't know	4	6.7%	8	13.3%	44	73.3%	20	33.3%
Not specified	0	0.0%	0	0.0%	0	0.0%	0	0.0%
Total	60	100.0%	60	100.0%	60	100.0%	60	100.0%

Over half of respondents (51.7%) had a positive perception of events/activities/entertainment in Rotorua. A further 36.7% had an extremely positive perception.

Three-quarters of respondents (75.0%) had a positive or extremely positive perception of the weather/climate in Rotorua. A further 21.7% had an average perception.

Almost all visitors (96.7%) had an extremely positive or positive perception of the tourism industry in Rotorua. One respondent (1.7%) had an average perception. (Refer to Table 19).

Table 55 – Visitors’ perceptions of Rotorua’s events, weather/climate, tourism industry, other

	Events		Weather/climate		Tourism industry		Other	
	Number	Percent	Number	Percent	Number	Percent	Number	Percent
Extremely positive	22	36.7%	13	21.7%	31	51.7%		0.0%
Positive	31	51.7%	32	53.3%	27	45.0%		0.0%
Average	2	3.3%	13	21.7%	1	1.7%		0.0%
Negative	0	0.0%	1	1.7%	0	0.0%		0.0%
Extremely negative	0	0.0%	0	0.0%	0	0.0%		0.0%
Don't know	5	8.3%	1	1.7%	1	1.7%		0.0%
Not specified	0	0.0%	0	0.0%	0	0.0%	60	100.0%
Total	60	100.0%	60	100.0%	60	100.0%	60	100.0%

Respondents were asked to think of three suggestions to improve Rotorua as a good place to live, work and learn. A total of 20.0% of suggestions involved improving crime (10.0%) and other infrastructure improvements (10.0%). A total of 33.2% of suggestions involved improving attractions (8.3%), education (8.3%), public transport (8.3%) and town improvements (8.3%). A further 10.0% of suggestions involved improving prices (6.7%) and tracks and walkways (3.3%). Comments for the ‘other’ category included “bring in more industry to Rotorua”, “lower parking fees”. (Refer to Table 13).

Table 56 - Three suggestions to improve Rotorua

	Number	Percent
Crime	6	10.0%
Other infrastructure improvements	6	10.0%
Attraction improvements	5	8.3%
Education	5	8.3%
Public transport	5	8.3%
Town improvements	5	8.3%
Prices	4	6.7%
Tracks/walkways	2	3.3%
Other	6	10.0%
Sample	60	

Note: Does not sum to 100.0% as respondents could specify three improvements.

Over half of respondents (53.3%) were employed in a professional and/or technical occupation. A total of 10.0% were either retired (5.0%) or unemployed (5.0%) and 20.0% was admin and clerical workers (10.0%) or students (10.0%). A further 8.3% were managerial workers. (Refer to Table 14).

Table 57 - Occupation of respondent

	Number	Percent
Retired	3	5.0%
Unemployed	3	5.0%
Admin & clerical	6	10.0%
Managerial worker	5	8.3%
Professional & technical	32	53.3%
Student	6	10.0%
Homemaker	1	1.7%
Agriculture, forestry and fishing	0	0.0%
Service worker	3	5.0%
Other	1	1.7%
Not specified	0	0.0%
Total	60	100.0%

Over half of respondents were male (58.3%) while 40.0% were female and one respondent (1.7%) was not specified. (Refer to Table 15).

Table 58 - Gender of respondent

	Number	Percent
Male	35	58.3%
Female	24	40.0%
Not specified	1	1.7%
Total	60	100.0%

The majority of respondents were aged between 21 and 49 years. A further 20.0% were over 50 years of age, and 5.0% between 16 and 20 years of age. (Refer to Table 16).

Table 59 - Age group of respondent

	Number	Percent
16-20	3	5.0%
21-29	19	31.7%
30-39	14	23.3%
40-49	12	20.0%
50-59	9	15.0%
60-69	3	5.0%
70+	0	0.0%
Refused	0	0.0%
Not specified	0	0.0%
Total	60	100.0%

Over half of respondents (56.6%) were international visitors from Australia (8.3%), UK/Ireland (20.0%), Europe (18.3%), Asia (3.3%) and USA/Canada (6.7%). The remaining visitors (43.3%) were domestic visitors from Auckland (18.3%), other North Island (11.7%), Christchurch (8.3%), Wellington (3.3%) and other South Island (1.7%). (Refer to Table 17).

Table 60 - Location respondent normally lives

	Number	Percent
Auckland	11	18.3%
Wellington	2	3.3%
Christchurch	5	8.3%
Dunedin	0	0.0%
Other North Is	7	11.7%
Other South Is	1	1.7%
Australia	5	8.3%
UK/Ireland	12	20.0%
Europe	11	18.3%
Asia	2	3.3%
USA/Canada	4	6.7%
Other	0	0.0%
Not specified	0	0.0%
Total	60	100.0%

8.1 Key points from the face to face survey – live, work and learn:

- Visitors to Rotorua chose as the three things that come to mind when thinking about Rotorua:
 - Geothermal activity/smell/geysers
 - Lakes/nature/scenery
 - Attractions/activities
- A total of 53.3% of visitors had a positive or extremely positive perception of Rotorua as a geographic location.
- Visitors rated infrastructure, safety, the community spirit, events and weather/climate positively and gave the tourism industry in Rotorua a 96.7% rating of positive or extremely positive.
- The most popular choices for improvement to Rotorua from visitors was crime and infrastructure improvements.

9.0 IMMIGRANTS TO ROTORUA SURVEY

Immigrant respondents were asked when thinking about Rotorua, what were the first three things that came to mind.

Table 61 – First three perceptions of Rotorua

	Number	Percent
Geothermal activity/smell/geysers	29	80.6%
Lakes/nature/scenery	26	72.2%
Maori/Maori culture	12	33.3%
Tourist destination	12	33.3%
Attractive/clean town	6	16.7%
Weather/climate	5	13.9%
Central location	3	8.3%
Crime	3	8.3%
Lifestyle/living	3	8.3%
Attractions/activities/things to do	2	5.6%
Shopping	1	2.8%
Other	3	8.3%
Sample	36	

Note: Not additive as respondents could identify multiple things

The most popular choices to this question were the geothermal activity/smell/geysers, lakes/nature/scenery, Maori/Maori culture and Rotorua being a tourist destination.

Comments coded to “geothermal activity/smell/geysers”:

- Boiling mud, smelly.
- Bubbling mud.
- Geothermal activity.
- Geothermal features and smell.
- Geysers (x3).
- Hot pools.
- Hot springs.
- Mud.
- Smell (x5).
- Stinky.
- Sulphur smell.
- Sulphur (x2).
- The sulphur smell.
- Thermal activity.
- Thermal pools.
- Thermal (x3).
- Very bad sulphur smell!!!
- Very cold and very smelly.
- Volcanic activities.
- Volcano.

Comments coded to “lakes/nature/scenery”:

- Beautiful lakes (x2).
- Beautiful (x2).
- Bush - beautiful environment.
- Forest (x4).
- Forests/lake.
- Hills.
- Lake front.

- Lake.
- Lakes and forest and garden city.
- Lakes (x9).
- Lakes/outdoors.
- Space - geographic/hills etc around.
- Wonderful forests.

*Comments coded to “**Maori/Maori culture**”:*

- Cultural experience.
- Maori culture (x7).
- Maori (x3).
- Maoris.

*Comments coded to “**tourist destination**”:*

- Facilities - Council and tourism.
- Holidays.
- Tourism (x7).
- Tourist attraction.
- Tourist town (x2).

*Comments coded to “**attractive/clean town**”:*

- City Centre.
- City Focus.
- Clean, tidy CBD.
- Lakes and forest and garden city.
- Lovely town centre.
- Nice suburbs.

*Comments coded to “**weather/climate**”:*

- Climate.
- Cold.
- Sunshine.
- The cold winter mornings.
- Very cold and very smelly.

*Comments coded to “**central location**”:*

- Central location.
- Good location in country - access to other towns.
- Location (central).

*Comments coded to “**crime**”:*

- Crime (x3).

*Comments coded to “**lifestyle/living**”:*

- A reasonable place to live.
- Boring.
- Lifestyle.

*Comments coded to “**attractions/activities/things to do**”:*

- Mountain biking (x2).

*Comments coded to “**shopping**”:*

- Eateries.

Comments coded to "other":

- Closed community.
- Fun.
- Waiariki.

Respondents were asked when thinking about Rotorua as a place to live, work and learn what their perceptions on various aspects of Rotorua were. The tables below list their responses.

Table 62 - Geographic location

	Number	Percent
Excellent	14	38.9%
Good	19	52.8%
Average	2	5.6%
Poor	0	0.0%
Very poor	1	2.8%
Don't know	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

As with the other surveys geographical location was rated well with 91.7% of respondents to this survey who thought it was a good or excellent aspect of Rotorua.

Table 63 - Housing

	Number	Percent
Excellent	5	13.9%
Good	13	36.1%
Average	10	27.8%
Poor	7	19.4%
Very poor	1	2.8%
Don't know	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Housing was considered average by 27.8% of respondents and good or better by 50% of respondents. Over a fifth of the sample (22.2%) rated housing as poor or worse.

Table 64 - Education

	Number	Percent
Excellent	1	2.8%
Good	18	50.0%
Average	9	25.0%
Poor	3	8.3%
Very poor	0	0.0%
Don't know	5	13.9%
Not specified	0	0.0%
Total	36	100.0%

Over 75% of immigrants believed education in Rotorua was average or better with 50% believing it was good.

Table 65 - Healthcare

	Number	Percent
Excellent	4	11.1%
Good	16	44.4%
Average	10	27.8%
Poor	3	8.3%
Very poor	0	0.0%
Don't know	3	8.3%
Not specified	0	0.0%
Total	36	100.0%

Immigrants have a good perception of healthcare in Rotorua with 55.5% rating it as good or excellent and 27.8% rating is as average.

Table 66 - Infrastructure

	Number	Percent
Excellent	5	13.9%
Good	21	58.3%
Average	9	25.0%
Poor	1	2.8%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Most respondents were happy with Rotorua's infrastructure with over two thirds of immigrants surveyed rating it as good (58.3%) or excellent (13.9%). A further 25.0% rated it as average.

Table 67 - Safety

	Number	Percent
Excellent	2	5.6%
Good	13	36.1%
Average	15	41.7%
Poor	4	11.1%
Very poor	2	5.6%
Don't know	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

The majority of Immigrants surveyed thought that Rotorua was safe although 16.7% rated Rotorua as poor or very poor.

Table 68 - Employment opportunities

	Number	Percent
Excellent	1	2.8%
Good	14	38.9%
Average	17	47.2%
Poor	2	5.6%
Very poor	1	2.8%
Don't know	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Most of the sample (88.9%) felt that employment opportunities were average or better.

Table 69 - Community spirit

	Number	Percent
Excellent	4	11.1%
Good	19	52.8%
Average	11	30.6%
Poor	1	2.8%
Very poor	0	0.0%
Don't know	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Immigrants had a favourable perception of Rotorua's community spirit with 63.9% rating it as good or excellent and 30.6% rating it as average.

Table 70 - Events / activities / entertainment

	Number	Percent
Excellent	9	25.0%
Good	13	36.1%
Average	11	30.6%
Poor	2	5.6%
Very poor	0	0.0%
Don't know	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Most respondents 91.7% rated events/activities/entertainment as average or better, with 25% of the sample rating them as excellent.

Table 71 - Weather/climate

	Number	Percent
Excellent	2	5.6%
Good	17	47.2%
Average	13	36.1%
Poor	3	8.3%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	1	2.8%
Total	36	100.0%

Immigrants were happy with Rotorua's weather/climate with 52.8% rating it as good or excellent. A further 36.1% rated the weather/climate as average.

Table 72 - Tourism industry

	Number	Percent
Excellent	14	38.9%
Good	19	52.8%
Average	2	5.6%
Poor	0	0.0%
Very poor	0	0.0%
Don't know	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Most respondents (91.7%) rated the tourism industry as good (52.8%) or excellent (38.9%).

Other:

One respondent identified Rotorua's sporting opportunities as good.

Please specify any comments?

- Random violence and theft is a big issue. It impacts residents and visitors and has a detrimental impact on Rotorua's economy.
- The traffic to and from work is very good. It's a pity when entering Rotorua from the north that one has to travel through car sales yards and factory districts to get to the tourist CBD and hardly have any association with the lake. Rotorua Lake is very dirty and not a good example of our clean green image.
- Wouldn't want to live anywhere else in the world.

Respondents were asked what perceptions they had about the following types of education in Rotorua. The responses are listed in the tables below.

Table 73 - Quality of early childhood education (0-5 yrs)

	Number	Percent
Extremely positive	2	5.6%
Positive	9	25.0%
Average	5	13.9%
Negative	3	8.3%
Extremely negative	0	0.0%
Don't know	14	38.9%
Not specified	3	8.3%
Total	36	100.0%

A majority of immigrants whom responded to this question had a perception that the quality of early childhood education in Rotorua was average or better (44.5%).

Table 74 - Quality of primary education (5-12 yrs)

	Number	Percent
Extremely positive	3	8.3%
Positive	12	33.3%
Average	9	25.0%
Negative	4	11.1%
Extremely negative	0	0.0%
Don't know	7	19.4%
Not specified	1	2.8%
Total	36	100.0%

Most immigrants were happy with the quality of primary education in Rotorua with 66.6% rating it as average or better. Some immigrants (11.1%) did have negative perceptions though.

Table 75 - Quality of secondary education (13-18 yrs)

	Number	Percent
Extremely positive	5	13.9%
Positive	9	25.0%
Average	8	22.2%
Negative	1	2.8%
Extremely negative	0	0.0%
Don't know	12	33.3%
Not specified	1	2.8%
Total	36	100.0%

Immigrants were happy with the quality of secondary education.

Table 76 - Quality of tertiary education

	Number	Percent
Extremely positive	1	2.8%
Positive	9	25.0%
Average	14	38.9%
Negative	2	5.6%
Extremely negative	0	0.0%
Don't know	9	25.0%
Not specified	1	2.8%
Total	36	100.0%

Immigrants were happy with the quality of tertiary education with 38.9% rating it as average and 27.8% rating it as positive or extremely positive.

Respondents were asked what perceptions they had about housing in Rotorua. The tables below lists their responses.

Table 77 – Housing quality

	Number	Percent
Extremely positive	2	5.6%
Positive	15	41.7%
Average	9	25.0%
Negative	8	22.2%
Extremely negative	1	2.8%
Don't know	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Immigrants had mixed perceptions about the quality of housing in Rotorua, with 47.3% having good perceptions, 25.0% having average perceptions and 25.0% having negative perceptions.

Table 78 – Housing affordability

	Number	Percent
Extremely positive	5	13.9%
Positive	16	44.4%
Average	10	27.8%
Negative	5	13.9%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Most immigrants were happy with the affordability of Rotorua houses although 13.9% had a negative perception of affordability.

Table 79 - Proximity to amenities

	Number	Percent
Extremely positive	6	16.7%
Positive	20	55.6%
Average	9	25.0%
Negative	0	0.0%
Extremely negative	1	2.8%
Don't know	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Immigrants surveyed had a positive perception of Rotorua's proximity to amenities.

Respondents were asked what perceptions they had about living in Rotorua. Their responses are listed in the tables below.

Table 80 - Sports facilities

	Number	Percent
Extremely positive	9	25.0%
Positive	13	36.1%
Average	11	30.6%
Negative	1	2.8%
Extremely negative	0	0.0%
Other	2	5.6%
Not specified	0	0.0%
Total	36	100.0%

A total of 91.7% of respondents had an average or better perception of sports facilities in Rotorua.

Table 81 - Cultural facilities

	Number	Percent
Extremely positive	11	30.6%
Positive	18	50.0%
Average	5	13.9%
Negative	2	5.6%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Most immigrants had a positive perception of Rotorua's cultural facilities with 50% of the sample rating them as positive and 30.6% as extremely positive.

Table 82 - Social groups

	Number	Percent
Extremely positive	5	13.9%
Positive	16	44.4%
Average	11	30.6%
Negative	1	2.8%
Extremely negative	0	0.0%
Other	3	8.3%
Not specified	0	0.0%
Total	36	100.0%

Over half of the immigrant respondents rated social groups in Rotorua positively and 30.6% rated them as average.

Table 83 - Outdoors environment / easy access to the outdoors

	Number	Percent
Extremely positive	20	55.6%
Positive	16	44.4%
Average	0	0.0%
Negative	0	0.0%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

All immigrants rated their perceptions of Rotorua's outdoor environment/easy access to the outdoors as positive or extremely positive.

Respondents were asked what perceptions they had about working in Rotorua.

Table 84 - Wage rates

	Number	Percent
Extremely positive	2	5.6%
Positive	5	13.9%
Average	20	55.6%
Negative	7	19.4%
Extremely negative	1	2.8%
Other	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Immigrants had mixed perceptions on wage rates in Rotorua with 55.6% having average perceptions, 19.5% having positive perceptions and 22.2% having negative perceptions.

Table 85 - Career progression

	Number	Percent
Extremely positive	1	2.8%
Positive	10	27.8%
Average	18	50.0%
Negative	6	16.7%
Extremely negative	0	0.0%
Other	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Most respondents (80.6%) had average or better perceptions about career progression. Almost a fifth (16.7%) of respondents reported having negative perceptions on career progression in Rotorua.

Table 86 - Transport links to city

	Number	Percent
Extremely positive	5	13.9%
Positive	16	44.4%
Average	13	36.1%
Negative	2	5.6%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Most immigrants were happy with the transport links to the city.

Table 87 - Roothing

	Number	Percent
Extremely positive	4	11.1%
Positive	20	55.6%
Average	9	25.0%
Negative	3	8.3%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	36	100.0%

Most respondents were happy with roading in Rotorua.

Table 88 - Business environment

	Number	Percent
Extremely positive	4	11.1%
Positive	19	52.8%
Average	12	33.3%
Negative	0	0.0%
Extremely negative	0	0.0%
Other	1	2.8%
Not specified	0	0.0%
Total	36	100.0%

Most immigrants were happy with the business environment of Rotorua with 52.8% rating their perception as positive and 11.1% as extremely positive.

Immigrants were asked what helped them decide to come to Rotorua.

Table 89 - Factors helping to make immigrants settle in Rotorua

	Number	Percent
Family/friends	11	30.6%
Internet	2	5.6%
Books	0	0.0%
Job offer	22	61.1%
Other	9	25.0%
Sample	36	100.0%

Note: Not additive as respondents could identify multiple reasons

Comments for job offer:

- A job offer from APR Architects.
- Contact over a year from NZ-Germany.
- Forest Research Institute.
- Graduate architect - APR Architects.
- My husband got a job offer as a mechanic.
- Position at the Research Institute.
- Scion.

Comments for other:

- A better lifestyle for our children.
- A lifestyle connected with the outdoors.
- A place of cultural interest.
- Brief holiday in Rotorua.
- Meeting my partner who lived here.
- Not specified.
- Partner's job.
- To get married
- Visited Rotorua.

Respondents were asked what three things they would undertake to improve Rotorua as a good place to live, work and learn. Their responses are listed in the information below:

Table 90 - Suggested improvements

	Number	Percent
Town improvements	18	50.0%
Crime/youth/negative image/safety	13	36.1%
Jobs/employment/business/shopping	5	13.9%
Community/sport activities/events	4	11.1%
Education	4	11.1%
Public transport	4	11.1%
Environment/clean lakes/rubbish	2	5.6%
Airport	1	2.8%
Attraction/event improvements	1	2.8%
Community wellbeing	1	2.8%
Other infrastructure improvements	1	2.8%
Other	9	25.0%
Sample	36	

Note: Not additive as respondents could identify multiple improvements

Youth would improve the crime and negative image of Rotorua as well as youth issues. They were also interested in improving community sports activities and events and making improvement to the town.

Idea	Suggested improvements coded to “town improvements”	Reason
A CBD that is integrated.		Amouhau Street separates the CBD.
Change the route into Rotorua.		From the Skyline Rides/Fairy Springs to Koutu there are car sales. It's too industrial.
Cover the CBD/Focus area. Provide an indoor shopping mall.		Safety for the cyclists.
Create bicycle lanes.		Ensure people can use environmentally friendly transport in a safe manner.
Establish a safe cycling network (also around the lake).		A visually better welcome to Rotorua is needed.
Improve gateways. Driving into the city through the industrial areas is poor. Add new route from Ngongotaha to city east of the railway.		Lots of them look quite scruffy and rough.
Improve housing structures.		Rotorua doesn't come across like a town. You like to go for a walk in
Improve structure of CBD - more orientated to lake. Move nice places to		

Idea	Reason
sit outside.	town, sit down and have a coffee but there is no lakefront orientation!
Improve the lakefront area.	More cafes and leisure activities around lakefront similar to Brisbane upgrades with water park.
Improve visual amenity.	Some very ugly parts of Rotorua.
Lakefront "wharf" extended.	Become part of the lake instead of looking at it.
Roundabouts.	More roundabouts at junctions to improve traffic flow.
Stop city expansion now!	It's the ideal size. From now on it's downhill.
Stop expansion of CBD activities outside of CBD.	City is sprawling and the CBD needs more vitality.
Subdivide sections less.	Too many beautiful homes crammed together.
To implement a stricter degree of building etiquette.	Too much rubbish is being built along the shore and in the CBD eg, the new centre behind the museum.
Undercover mall.	
Upgrade government style housing.	

Suggested improvements coded to "crime/youth/negative image/safety"

Idea	Reason
Compulsory classes for the unemployed youth.	To reduce crime.
Encourage youth to get involved with worthwhile activities.	Help reduce crime.
Extra policing.	To lower crime rates.
Improve safety.	
Increase police numbers. More video surveillance.	In the hope that less crime would cut down on negative reports.
Lower crime.	Get youth involved in more healthy activities.
More activities (which exclude alcohol) for those between 15 and 20.	Keep them off the streets and away from the liquor shop.
More community involvement for youth.	Keep youth occupied and off the streets.
More sports groups for kids.	Lower crime.
Reduce crime.	
Reduce the crime rate.	Interferes with the quality of life.
Revive cultural respect in the younger generation.	The younger generation has lost respect of culture in Rotorua - vandalism and general negative input.
Security.	Improve around tourist areas.

Suggested improvements coded to “jobs/employment/business/shopping”

Idea	Reason
Advertise maximum jobs in newspapers.	To be able to find the proper job.
Close shops at 2pm on Saturday, Sundays whole day and all Public Holidays. Make Easter Sunday Public Holiday.	To improve family values. Families should have more time together.
Encourage employers to take on 'fresh blood' from outside the region.	Too many young people get employment because of who they know and not what they know. This leads to poor standards, particularly in schools.
Improve the quality of the service everywhere ie, in restaurants.	Not up to tourist expectations.
More family-type restaurants (not MacDonald's). More restaurants on the lakeside. There are no coffee shops within shops ie, supermarkets. Link a coffee shop to a supermarket.	

Suggested improvements coded to “community/sport activities/events”

Idea	Reason
Improve relationships between RDC and sporting codes other than rugby to attract events to the city.	Make better use of the international stadium and surrounds and attract national tournaments etc, not just the new energy centre.
More cultural and semi-educational leisure activities. More community based activities.	
More events for the family.	More signs for the tourist attractions.
Try to get more cultural events and facilities to this place.	Not enough.

Suggested improvements coded to “education”

Idea	Reason
A better learning institution.	Waiariki just doesn't cut the mustard!
Improve education for those in the lower socio-economic bracket.	Easy to drop out and give up because there are plenty of jobs around.
Improve education.	Not living up to expectations in comparison to other cities.
In schools there is too much emphasis put on the underachievers. Focus more on achievement. There should be more initiatives and higher expectations (of the children).	

Suggested improvements coded to “public transport”	
Idea	Reason
More buses.	No buses after 6pm.
Put in a good railway link for goods and passengers.	Remove trucks from main roads. Provide a good link to Auckland and Hamilton.
Put in a tram – light rail to link Whaka, CBD, railway and Fairy Spring.	Boost tourism and improve tourist site links.
Tram system.	
Suggested improvements coded to “environment/clean lakes/rubbish”	
Idea	Reason
Clean up the image of the lake.	Apart from the waterfront park, Rotorua CBD has a very shabby lakefront. Turn the gold course into a park for all to use.
Recycling. Rubbish should be separated before being collected. Provided separate bags/bins for recycling.	
Suggested improvements coded to “airport”	
Idea	Reason
Speed up airport extension.	
Suggested improvements coded to “attraction/event improvements”	
Idea	Reason
Discounts for residents at attractions.	So locals can use facilities.
Suggested improvements coded to “community wellbeing”	
Idea	Reason
Need a more unified community (Pakeha and Maori).	Lack of unification is noticeable.
Suggested improvements coded to “other infrastructure improvements”	
Idea	Reason
Improve winter facilities to compete with ski fields.	Reasons given in this area (more water-themed parks for kids and adults).

Suggested improvements coded to "other"

Idea	Reason
Cheaper rates for homeowners.	
Finish road out of Rotorua towards Tirau.	It's poor. They have been working on the road for up to a year.
Have a business focus on the council. Enable a political/group ticket.	Too many individual private agendas. Need to have a developed positive business thinking on the council.
Improve the weather!	
Information pack of Rotorua facilities to new residents.	New Zealand has a totally different way of life to a lot of cultures.
Media to be more positive.	Currently there are sensational stories on the front page. The good news is tucked away.
Stop knocking ourselves.	We take a lot of what we have for granted.
The city council should be more involved in local development and have more vision and initiative. Rotorua could be turned into a vibrant place.	
Treat all races equally (especially foreigners).	

Respondents were asked to specify any further comments regarding Rotorua as a place to live, work and learn.

Comments specified:

- As an outsider it was initially difficult to find work.
- Good.
- Great bar service.
- Housing sprawl with houses on every hill needs to be controlled before all the green hills around the CBD are lost. Need for better lakeside commercial development with attractive cafes and bars. Remove all overhead power/telecom/cables.
- Parking within the CBD is too expensive. Rail access into CBD. More water-themed parks for kids and adults. Improved road network to Hamilton and Tauranga (especially the road from Fairy Springs to Ngongotaha). International airport.
- Rotorua is an excellent place to raise a family. The facilities are excellent and it is very family orientated.
- Seeing that Rotorua is a very popular cycling destination, more attention could be given to the cycling public - bike racks and cycle lanes. There is one bike rack at Zippy's!!
- The central business district is lacking "cosy corners". Save entertainment opportunities for teenagers. Appearance of a number of buildings in the CBD is appalling. Owners need to be force by the Council to act on this.
- Tourism is important. Must accept a new business approach. Improve managerial process.

Respondents were asked what occupation groups they came from.

Table 91 – Respondent occupations

	Number	Percent
Retired	2	5.6%
Unemployed	1	2.8%
Admin & clerical	3	8.3%
Managerial worker	1	2.8%
Professional & technical	24	66.7%
Student	1	2.8%
Homemaker	1	2.8%
Agriculture, forestry and fishing	0	0.0%
Service worker	0	0.0%
Other	3	8.3%
Not specified	0	0.0%
Total	36	100.0%

Most of the respondents were professional and technical employees.

Other specified:

- Student and part time retail.
- Tourism and hospitality.

Respondents were asked what gender they were.

Table 92 – Respondents gender

	Number	Percent
Male	19	52.8%
Female	16	44.4%
Not specified	1	2.8%
Total	36	100.0%

There were 52.8% of males who answered the survey and 44.4% of females. One respondent did not complete the survey form and hence their gender was not recorded.

Table 93 – Respondent age groups

	Number	Percent
16-20	0	0.0%
21-29	6	16.7%
30-39	9	25.0%
40-49	11	30.6%
50-59	3	8.3%
60-69	4	11.1%
70+	2	5.6%
Refused	0	0.0%
Not specified	1	2.8%
Total	36	100.0%

Table 94 - Respondents time in their area

	Number	Percent
Less than 1 year	7	19.4%
1-5 years	14	38.9%
6-10 years	2	5.6%
11-15 years	2	5.6%
16-25 years	7	19.4%
26-50 years	2	5.6%
50 years +	0	0.0%
Refused	0	0.0%
Not specified	2	5.6%
Total	36	100.0%

Most respondents had been in Rotorua between one and five years (38.9%), and 19.4% had been in Rotorua between 16 to 25 years.

Immigrants were asked what country they emigrated from.

Table 95 – Where respondents emigrated from

	Number	Percent
Europe	22	61.1%
Asia	4	11.1%
Africa	7	19.4%
Pacific	1	2.8%
Americas	1	2.8%
Not specified	1	2.8%
Total	36	100.0%

Most immigrants surveyed were from Europe (61.1%).

9.1 KEY POINTS FROM THE IMMIGRANTS SURVEY

- Immigrants selected geothermal activity/smell/geysers as the first thing that comes into their minds when thinking about Rotorua.
- The majority of immigrants rated the geographic location and the tourism industry as good or excellent.
- The majority of immigrants rated education, healthcare, infrastructure, safety, employment opportunities, community spirit, events/activities/entertainment and the weather/climate as average or good.
- Nearly 20% of immigrants rated housing as poor and 11.1% rated safety as poor.
- Nearly 40% of immigrants (38.9%) did not know about the quality of early childhood education, 33.3% did not know about the quality of secondary education and a quarter did not know about the quality of tertiary education.
- The majority of immigrants rated Rotorua's proximity to amenities, sports facilities, transport links to the city, roading, social groups and the business environment either average or positively.
- Over 80% of immigrants rated Rotorua's cultural facilities positively or extremely positively.
- All immigrants rated the outdoors environment positively or extremely positively.
- Nearly 23% of immigrants rated wage rates in Rotorua negatively.
- Nearly 17% of immigrants rated career progression negatively.
- There were 61.1% of immigrants who settled in Rotorua because of a job offer.
- Immigrants chose town improvements, improvements to crime/youth/negative image/safety and improvements to jobs/employment/business/shopping as the three things they would undertake to improve Rotorua.

10.0 YOUTH SURVEY

A total of 54 surveys were undertaken with youth from Rotorua between 16-20 years of age. Most of the youth were students and half of them had lived in the area all of their lives. The youths were selected from a youth network across schools in the region.

Youth respondents were asked when thinking about Rotorua, what were the first three things that came to mind.

Table 96 – First three perceptions

	Number	Percent
Geothermal activity/smell/geysers	34	63.0%
Lakes/nature/scenery	28	51.9%
Attractions/activities/things to do	18	33.3%
Tourist destination	18	33.3%
Family/friends/family history	10	18.5%
Maori/Maori culture	8	14.8%
Attractive/clean town	7	13.0%
Crime	6	11.1%
Shopping	4	7.4%
Friendly people	1	1.9%
Central location	0	0.0%
Weather/climate	0	0.0%
Other	22	40.7%
Sample	54	

Note: Not additive as respondents could identify multiple things

The most popular choices to this question were the geothermal activity/smell/geysers, lakes/nature/scenery, attractions/activities/things to do and a tourist destination.

*Comments coded to “**geothermal activity/smell/geysers**”:*

- Geothermal activity.
- Geothermal (x3).
- Geysers (x2).
- Hot pools (x2).
- Hot water (x2).
- Mudpools (x6).
- Smell (x8).
- Sulphur (x2).
- Thermal activity (x2).
- Thermal areas.
- Thermal pools.
- Thermal (x4).

*Comments coded to “**lakes/nature/scenery**”:*

- Bush (x2).
- Forest (x5).
- Lake (x6).
- Lakes (x14).
- Trees.

*Comments coded to “**attractions/activities/things to do**”:*

- Adventure tourism (x2).
- Attractions.
- Fishing.
- Fishing.

- Gondola (x3).
- Luge.
- Mountain biking (x6).
- Parties.
- Tourist attractions.
- Whaka.

Comments coded to “tourist destination”:

- Hotels (x2).
- Motels (x2).
- Tourism (x9).
- Tourists (x5).

Comments coded to “family/friends/family history”:

- Friends (x3).
- Home (x7).

Comments coded to “Maori/Maori culture”:

- Cultural stuff.
- Culture (x4).
- Maori culture (X2).
- Maoris.

Comments coded to “attractive/clean town”:

- CBD.
- City Focus.
- City.
- Clean.
- Kuirau Park.
- Nice place (x2).

Comments coded to “crime”:

- Crime (x5).
- Gangs and crime.

Comments coded to “shopping”:

- Bad nightlife.
- Cafes (x2).
- Cheap.

Comments coded to “friendly people”:

- People.

Comments coded to “other”:

- Bath house.
- Boring (x2).
- Enjoyable to live in.
- Farmland.
- Forestry.
- Hole in ground.
- Hole (x2).
- Lakefront.
- Peace.
- Rugged people.
- Rugged (x3).

- School (x3).
- Small (x2).
- Western Heights (x2).

Respondents were asked when thinking about Rotorua as a place to live, work and learn what their perceptions on various aspects of Rotorua were. The tables below lists their responses.

Table 97 - Geographic location

	Number	Percent
Excellent	16	29.6%
Good	25	46.3%
Average	12	22.2%
Poor	1	1.9%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

As with the other surveys geographical location was rated well with 75.9% of respondents to this survey who thought it was a good or excellent aspect of Rotorua.

Table 98 - Housing

	Number	Percent
Excellent	2	3.7%
Good	16	29.6%
Average	34	63.0%
Poor	1	1.9%
Very poor	0	0.0%
Don't know	1	1.9%
Not specified	0	0.0%
Total	54	100.0%

Housing was mostly considered average (63%) by respondents to this survey however 33.3% of respondents thought housing in Rotorua was good or excellent.

Table 99 - Education

	Number	Percent
Excellent	6	11.1%
Good	31	57.4%
Average	14	25.9%
Poor	3	5.6%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Over 50% of youth rated education in Rotorua as good and 11.1% rated it as excellent. Youth rated education better than any other survey respondent group.

Table 100 - Healthcare

	Number	Percent
Excellent	2	3.7%
Good	19	35.2%
Average	28	51.9%
Poor	4	7.4%
Very poor	0	0.0%
Don't know	1	1.9%
Not specified	0	0.0%
Total	54	100.0%

Just over half of respondents rated healthcare as average in Rotorua and 38.9% rated it as good or excellent.

Table 101 - Infrastructure

	Number	Percent
Excellent	2	3.7%
Good	15	27.8%
Average	31	57.4%
Poor	6	11.1%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Over half of youth respondents (57.4%) to the survey rated the infrastructure in Rotorua as average.

Table 102 - Safety

	Number	Percent
Excellent	0	0.0%
Good	14	25.9%
Average	26	48.1%
Poor	14	25.9%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

There was a mixture of responses by youth to the question of safety in Rotorua. Nearly half of the respondents thought that safety in Rotorua was average, a quarter thought that safety was good and a quarter thought safety was poor.

Table 103 - Employment opportunities

	Number	Percent
Excellent	2	3.7%
Good	16	29.6%
Average	26	48.1%
Poor	8	14.8%
Very poor	1	1.9%
Don't know	1	1.9%
Not specified	0	0.0%
Total	54	100.0%

Nearly half of the youth respondents to the survey thought that employment opportunities were average while 33.3% of respondents thought that the opportunities were good or excellent.

Table 104 - Community spirit

	Number	Percent
Excellent	9	16.7%
Good	22	40.7%
Average	13	24.1%
Poor	7	13.0%
Very poor	2	3.7%
Don't know	0	0.0%
Not specified	1	1.9%
Total	54	100.0%

Over half of the youth respondents thought that the community spirit in Rotorua was good or excellent. Nearly one quarter of respondents thought that it was average.

Table 105 - Events / activities / entertainment

	Number	Percent
Excellent	4	7.4%
Good	19	35.2%
Average	20	37.0%
Poor	9	16.7%
Very poor	1	1.9%
Don't know	1	1.9%
Not specified	0	0.0%
Total	54	100.0%

A total of 72.2% of respondents thought that the events/activities/entertainment in Rotorua was average or good. There were 16.7% of youth who thought that this aspect of Rotorua was poor.

Table 106 - Weather/climate

	Number	Percent
Excellent	0	0.0%
Good	14	25.9%
Average	23	42.6%
Poor	13	24.1%
Very poor	4	7.4%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A total of 42.6% of youth respondents thought that the weather/climate was average, just under one quarter said the weather/climate was poor and a similar amount of respondents said the weather was good.

Table 107 - Tourism industry

	Number	Percent
Excellent	33	61.1%
Good	17	31.5%
Average	2	3.7%
Poor	1	1.9%
Very poor	1	1.9%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A high 61.1% of youth respondents rated the tourism industry as excellent and 31.5% rated it as good.

Please specify any comments?

- Great culture in Rotorua.
- Great natural beauty in Rotorua.
- Pictures of Rotorua with clean/green image.
- Rotorua has a great location being so close to other cities.

Respondents were asked what perceptions they had about the following types of education in Rotorua. The responses are listed in the tables below.

Table 108 - Quality of early childhood education

	Number	Percent
Extremely positive	2	3.7%
Positive	32	59.3%
Average	17	31.5%
Negative	3	5.6%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A majority of youth respondents thought that the quality of early childhood education in Rotorua was positive while 31.5% thought that it was average.

Table 109 - Quality of primary education

	Number	Percent
Extremely positive	7	13.0%
Positive	39	72.2%
Average	8	14.8%
Negative	0	0.0%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Youth respondents were very positive in their rating of the quality of primary education in Rotorua. No youth respondents gave a negative response to the quality of primary education.

Table 110 - Quality of secondary education

	Number	Percent
Extremely positive	18	33.3%
Positive	23	42.6%
Average	13	24.1%
Negative	0	0.0%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

There were also no negative responses to the quality of secondary education in Rotorua and 42.6% of respondents gave secondary education a positive rating.

Table 111 - Quality of tertiary education

	Number	Percent
Extremely positive	1	1.9%
Positive	15	27.8%
Average	29	53.7%
Negative	9	16.7%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A majority of respondents to the youth survey rated tertiary education as only average in Rotorua.

Respondents were asked what perceptions they had about housing in Rotorua. The tables below lists their responses.

Table 112 – Housing quality

	Number	Percent
Extremely positive	1	1.9%
Positive	19	35.2%
Average	30	55.6%
Negative	4	7.4%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A majority of youth respondents thought that housing in Rotorua was only average and 35.2% gave housing quality a positive rating.

Table 113- Housing affordability

	Number	Percent
Extremely positive	5	9.3%
Positive	35	64.8%
Average	14	25.9%
Negative	0	0.0%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A total of 64.8% of youth respondents had a positive perception of housing affordability in Rotorua. There were no negative responses from youth about housing affordability.

Table 114 – Housing proximity to amenities

	Number	Percent
Extremely positive	6	11.1%
Positive	35	64.8%
Average	13	24.1%
Negative	0	0.0%
Extremely negative	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Youth respondents (64.8%) had a positive perception of Rotorua's proximity to amenities.

Respondents were asked what perceptions they had about living in Rotorua. Their responses are listed in the tables below.

Table 115 - Sports facilities

	Number	Percent
Extremely positive	7	13.0%
Positive	34	63.0%
Average	12	22.2%
Negative	1	1.9%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A total of 63% of respondents had a positive perception of sports facilities in Rotorua.

Table 116 - Cultural facilities

	Number	Percent
Extremely positive	21	38.9%
Positive	20	37.0%
Average	12	22.2%
Negative	1	1.9%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Youth respondents were extremely positive about cultural facilities in Rotorua with 75.9% of them giving this aspect of Rotorua an extremely positive or positive rating.

Table 117 - Social groups

	Number	Percent
Extremely positive	2	3.7%
Positive	28	51.9%
Average	22	40.7%
Negative	2	3.7%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Just over half of the youth respondents rated social groups in Rotorua positively and 40.7% rated them as average.

Table 118 - Outdoors environment / easy access to the outdoors

	Number	Percent
Extremely positive	30	55.6%
Positive	20	37.0%
Average	4	7.4%
Negative	0	0.0%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Over 50% of youth respondents rated the outdoor environment/easy access to the outdoors as excellent.

Table 119 - Healthcare

	Number	Percent
Extremely positive	0	0.0%
Positive	26	48.1%
Average	26	48.1%
Negative	2	3.7%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

There were a similar number of respondents (48.1%) who thought healthcare in Rotorua was positive or average.

Table 120 - Safety

	Number	Percent
Extremely positive	1	1.9%
Positive	15	27.8%
Average	28	51.9%
Negative	10	18.5%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Nearly 20% of youth respondents had a negative perception of safety in Rotorua and 51.9% of them thought safety was only average.

Respondent were asked what perceptions they had about working in Rotorua.

Table 121 - Wage rates

	Number	Percent
Extremely positive	0	0.0%
Positive	20	37.0%
Average	24	44.4%
Negative	6	11.1%
Extremely negative	4	7.4%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Nearly half of youth respondents (44.4%) had only an average perception about wage rates in Rotorua and 11.1% had a negative perception about wages. Just over one third of youth had a positive perception of wage rates.

Table 122 - Career progression

	Number	Percent
Extremely positive	0	0.0%
Positive	10	18.5%
Average	32	59.3%
Negative	11	20.4%
Extremely negative	1	1.9%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Over half of the youth respondents (59.3%) had only an average perception of career progression in Rotorua. Just over one quarter of youth respondents had a negative perception of career progression in Rotorua.

Table 123 - Transport links to city

	Number	Percent
Extremely positive	3	5.6%
Positive	24	44.4%
Average	21	38.9%
Negative	6	11.1%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A total of 44.4% of youth respondents had a positive perception of transport links to the city and 38.9% of them thought the links were average.

Table 124 - Roothing

	Number	Percent
Extremely positive	1	1.9%
Positive	21	38.9%
Average	27	50.0%
Negative	5	9.3%
Extremely negative	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Half of the youth respondents thought the roading in Rotorua was average however, over 40% had a positive or extremely positive perception of roading.

Table 125 - Business environment

	Number	Percent
Extremely positive	2	3.7%
Positive	24	44.4%
Average	24	44.4%
Negative	3	5.6%
Extremely negative	1	1.9%
Other	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

A total of (44.4%) of youth respondents perceived the business environment in Rotorua as average and 44.4% it positively.

Respondents were asked what three things they would undertake to improve Rotorua as a good place to live, work and learn. Their responses are listed in the information below:

Table 126 - Suggested improvements

	Number	Percent
Crime/youth/negative image/safety	30	55.6%
Community/sport activities/events	17	31.5%
Town improvements	16	29.6%
Environment/clean lakes/rubbish	10	18.5%
Public transport	10	18.5%
Attraction/event improvements	9	16.7%
Jobs/employment/business	8	14.8%
Other infrastructure improvements	5	9.3%
Airport	4	7.4%
Education	4	7.4%
Community wellbeing	2	3.7%
Parking	1	1.9%
Other	11	20.4%
Sample	54	

Note: Not additive as respondents could identify multiple improvements

Youth would improve the crime and negative image of Rotorua as well as youth issues. They were also interested in improving community sports activities and events and making improvement to the town.

Suggested improvements coded to “crime/youth/negative image/safety”

Idea	Reason
Boy racer pad.	Get them off roads.
Crack down on beneficiary fraud.	Because people shouldn't have to support people who don't deserve it.
Cut crime rate.	Safety.
Cut crime.	Gives a better reputation.
Get bad people in prison.	Too many people get away with crime.
Get rid of crime.	So you don't get gang raped if you walk through Kuirau Park.
Have boy race pads.	Stop it on streets.
Improve crime rate.	Because it's high.
Improve Da Bomb Shelter.	Limited activities.
Improve people's attitudes towards unsafe Rotorua.	

Idea	Reason
Improve police force.	Too much crime.
Improve police numbers.	Health care.
Improve police system.	Too much crime.
Improve police.	Too little protection.
Improve police.	Too much crime.
Improve security.	More intermediates.
Increase police presence and training.	Crack down on huge amount of crime and drugs.
Increase security.	Rotorua is not a safe place to walk at night.
Increase security.	So it will be safer.
Increased security.	Less crime.
More police.	Help stop drugs.
More police.	Reduce crime.
More police.	To cut crime.
More things to do for youth.	Not enough activities.
New youth centre.	Nothing interesting that is fun and affordable for youth.
Police and safety awareness.	Police are slack.
Police petty crimes more.	Petty crime rate is quite high.
Provide more youth activities.	To keep them out of trouble.
Put more events on for kids.	Not many events for teenagers.
Try to do better to stop crime.	It doesn't feel safe to walk outside at night.

Suggested improvements coded to "community/sport activities/events"

Idea	Reason
Attract more events to Rotorua.	More money for people.
Better sports facilities.	Better environment.
Bigger activities ie, like the mountain biking.	Brings money to Rotorua.
Improve sports facilities.	Horse clubs are rundown.
Introduce Rotorua Rodeo.	Fun.
More big events.	
More community events.	Improve city's moral.
More community events.	To raise Rotorua spirit.
More entertainment facilities.	Would get people off the streets.
More focus on locals.	Too many attractions aimed at tourists.
More games at stadium.	Better quality of game.

Idea	Reason
More games at stadium.	Not being used properly.
More luge tracks.	Cater for more types of people.
More outdoors activities (rock climbing).	More attractions for tourists.
More promotion of golf courses.	Not recognised enough.
Promote fishing as an activity for youth.	Keep them off the street.
Promotion of mountain biking.	Brings in tourists.

Suggested improvements coded to "town improvements"

Idea	Reason
Another pool centre.	More space for competitors.
Better upkeep of Kuirau Park.	It gets rundown.
CBD.	Needs to be better.
Clean up at lakefront.	Messy at the moment.
Colour design of CBD.	Too boring with normal colours.
Fake wave flow rider.	Huge dance club.
Improve CBD.	
Improve town nightlife.	Too boring.
Make it pretty.	So it will be pretty.
More flowers and plants in town.	Make the city look cleaner.
More nightclubs.	Ones are bad at the moment.
More nightlife.	Attract a variety of people.
More nightlife.	Attract more people.
Separation of CBD into retail business areas.	More focus separately of on each of them.
Solve the mall problem.	People being taken away from shops in the centre of town.
Start a milk bar.	Get youth off street.

Suggested improvements coded to "environment/clean lakes/rubbish"

Idea	Reason
Clean up lake.	Polluted.
Clean up lakes.	Polluted.
Clean up lakes.	Polluted.
Clean up lakes.	They're polluted.
Clean up the lakes.	"Clean green" image.

Idea	Reason
Fix lakes.	
Fix lakes.	They're polluted.
Kerbside recycling.	Better for environment.
Lake clean up.	Improve crime rates.
Run environmental programmes in school.	Rotorua's environment is getting damaged.

Suggested improvements coded to "public transport"

Idea	Reason
Better buses.	Can't go to enough places.
Better transport eg, trams.	Cheaper and easier to get from A to B.
Better transport system.	Improve accessibility.
Bus system.	More regular buses later at night.
Improve public transport.	More local activities.
Improve transport system.	
More public transport.	
Public transport.	More range of options.
Train link to Auckland.	Bus takes too long. Flight too expensive. Train more luxury.
Train system going.	Cheap transport.

Suggested improvements coded to "attraction/event improvements"

Idea	Reason
Close linking of attractions.	Cheaper for locals.
Focus on adventure tourism.	Benefit to economy.
Have more mountain bike tracks.	
More (good!) tourism activities.	To increase money going into Rotorua.
More events.	
More events.	Draw more people to the city.
More money spent on forest.	Better upkeep.
Tourist attraction water park using hot water.	Attract tourists.
Utilise lakes as tourist attractions.	More variety of attractions to attract tourists.

Suggested improvements coded to "jobs/employment/business"

Idea	Reason
Better newspaper.	Daily Post is not very good.
Better nightclubs.	Not enough variety.
Cheaper shops.	Too expensive.
Encourage business development in town.	To focus at the mall.
Encourage social nightlife.	Too little variety and not enough happening.
Improve appeal to school leavers.	Keep them for jobs.
Improve unemployment.	
Variety of shops.	

Suggested improvements coded to "other infrastructure improvements"

Idea	Reason
Improve roading system.	Rugged.
Improve roads.	Need to be better.
Improve Te Ngae Road to expressway.	Improve speed of traffic.
More cycle lanes.	Heaps of cyclists on main part of road.
Upgrade roading.	Potholes etc.

Suggested improvements coded to "airport"

Idea	Reason
Extend airport.	More tourists.
Flying school.	more use of airport.
International airport.	Tourism benefits. Increased accessibility. Benefits economy.
Upgrade airport to international.	Direct route.

Suggested improvements coded to "education"

Idea	Reason
Better schooling.	Quality education.
More better teachers.	Better learning.
More money into schools.	Help with better equipment.
More youth apprenticeships (eg radio).	Not enough at the moment. Stop people being unemployed.

Suggested improvements coded to “community wellbeing”

Idea	Reason
Better hospital workers.	Serving at slow speed.
Community groups to help stop the violence.	There needs to be more help available for people facing family violence.

Suggested improvements coded to “parking”

Idea	Reason
No parking fees.	Too expensive at the moment.

Suggested improvements coded to “other”

Idea	Reason
Improve awareness of youth rights.	Police take advantage of people.
Increase minimum wage.	Too low.
Increase wages.	More money for schooling.
Liquor ban in residential areas.	Stop people drinking on roads.
Make secondary schools flasher.	Because it's rugged.
More ads about Rotorua.	Increase tourist numbers.
Multi language signs.	So tourists can understand them.
No loitering.	Too much already happening.
Place tourism tax payable by tourism business.	Used to further (market) promote Rotorua tourism.
Recognise council budget.	To make rates fairer. Tourism gets too many dollars.
Upgrade telecommunications.	Real bad.

Respondents were asked to specify any further comments regarding Rotorua as a place to live, work and learn.

Comments specified:

- Council needs to take more interest in business development in CBD.
- It is a good place.
- Make more mountain bike tracks.
- Rotorua is a nice place to live because of the easy access to outdoor activities eg, mountain biking.

Table 127 – Respondent occupation groups

	Number	Percent
Retired	0	0.0%
Unemployed	0	0.0%
Admin & clerical	0	0.0%
Managerial worker	0	0.0%
Professional & technical	0	0.0%
Student	50	92.6%
Homemaker	0	0.0%
Agriculture, forestry and fishing	0	0.0%
Service worker	1	1.9%
Other	2	3.7%
Not specified	1	1.9%
Total	54	100.0%

Most of the youth respondents were students.

Other specified:

- Food and beverage attendant.
- Mill hand.

Respondents were asked what gender they were.

Table 128 - Gender

	Number	Percent
Male	28	51.9%
Female	26	48.1%
Not specified	0	0.0%
Total	54	100.0%

There were 51.9% of males who answered the survey and 48.1% of females.

Respondents were asked what age group they were from. All the respondents were between 16-20 years of age.

Table 129 – Respondent age groups

	Number	Percent
16-20	54	100.0%
21-29	0	0.0%
30-39	0	0.0%
40-49	0	0.0%
50-59	0	0.0%
60-69	0	0.0%
70+	0	0.0%
Refused	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Table 130 – Respondent locations

	Number	Percent
Auckland/Northland	0	0.0%
Canterbury	0	0.0%
Otago	0	0.0%
Wellington	0	0.0%
Waikato/Bay of Plenty	52	96.3%
West Coast	1	1.9%
Hawke's Bay/Gisborne	0	0.0%
Marlborough/Nelson/Tasman	0	0.0%
Taranaki/Manawatu/Wanganui	0	0.0%
Southland	0	0.0%
Overseas	0	0.0%
Other	0	0.0%
Not specified	1	1.9%
Total	54	100.0%

Nearly all of the respondents lived in the Bay of Plenty/Waikato region.

Table 131 – Respondents time in their locations

	Number	Percent
Less than 1 year	0	0.0%
1-5 years	4	7.4%
6-10 years	7	13.0%
11-15 years	12	22.2%
16-25 years	31	57.4%
26-50 years	0	0.0%
50 years +	0	0.0%
Refused	0	0.0%
Not specified	0	0.0%
Total	54	100.0%

Over half of the respondents had lived in their area all of their lives.

Respondents were asked what ethnicity they considered themselves to be.

Table 132 – Respondents ethnicity

	Number	Percent
NZ European/Pakeha	39	72.2%
NZ Maori	3	5.6%
NZ Maori & Pakeha	7	13.0%
Pacific Island	0	0.0%
Asian	0	0.0%
Other	4	7.4%
Not specified	1	1.9%
Total	54	100.0%

A total of 72.2% of youth respondents were NZ European/Pakeha and 13.% were MZ Maori and Pakeha.

10.1 KEY POINTS FROM THE YOUTH SURVEY

- Youth selected geothermal activity/smell/geysers as the first thing that comes into their mind when thinking about Rotorua.
- The majority of youth rated geographic location and the tourism industry in Rotorua as good or excellent.
- The majority of youth rated housing, education, healthcare, infrastructure, safety, employment opportunities, community spirit, events/activities/entertainment and the weather/climate either good or average.
- There were 14-26% of youth who rated safety (25.9%), employment opportunities, events/activities/entertainment, tertiary education and the weather and climate as poor.
- The majority of youth rated early childhood, primary and secondary education as either average or positive.
- The majority of youth rated housing quality, affordability and proximity to amenities as positive or average.
- Most of the youth respondents rated the outdoor environment/easy access to the outdoors extremely positively or positively.
- The majority of youth respondents rated sports facilities, social groups, healthcare, wage rates, career progression, transport links, roading, and the business environment as positive or average.
- A total of 20.4% of youth respondents rated career progression negatively.

SECTION 3: INVEST, SET UP & DO BUSINESS SURVEY RESULTS

11.0 TELEPHONE SURVEY

A total of 106 telephone surveys were completed with Waikato/Bay of Plenty local businesses and selected domestic markets (Auckland, Wellington and Canterbury).

Respondents were asked for the first three things that came into their mind when thinking about Rotorua.

Table 133 - Thoughts about Rotorua

	Number	Percent
Geothermal activity/smell/geysers	60	56.6%
Tourist destination	50	47.2%
Lakes/nature/scenery	43	40.6%
Attractions/activities/things to do	25	23.6%
Maori/Maori culture	20	18.9%
Shopping/business/industry	17	16.0%
Central location	13	12.3%
Family/friends/family history	8	7.5%
Friendly people	8	7.5%
Weather/climate	7	6.6%
Lifestyle	6	5.7%
Crime/dishonest	5	4.7%
Attractive/clean town	3	2.8%
Other	18	17.0%
Sample	106	

Note: Not additive as respondents could identify multiple things

Over half of the respondents (56.6%) to the telephone survey thought of geothermal activity/smell/geysers when thinking of Rotorua. A total of 47.2% of respondents thought of Rotorua as a tourist destination and 40.6% thought of the lakes/nature/scenery when thinking about Rotorua.

Comments coded to “geothermal activity/smell/geysers”:

- Geothermal (x4).
- Geysers (x6).
- Hot pools (x13).
- Mud pools (x10).
- Mud.
- Smell of sulphur (x6).
- Smell (x10).
- Spa.
- Steam.
- Thermal activity (x2).
- Thermal (x6).

Comments coded to “tourist destination”:

- Accommodation.
- Family holiday destination.
- Holiday (x2).
- Motels.
- Tourism (x38).

- Tourists (x7).

Comments coded to “lakes/nature/scenery”:

- Beautiful lake.
- Beautiful lakes.
- Beautiful place.
- Beautiful scenery (x2).
- Forest (x2).
- Forests and lakes (x3).
- Forests.
- Green.
- Layout of Rotorua. Natural setting.
- Lovely scenery.
- Nice scenery.
- Out door life.
- Out door recreation.
- Outdoor lifestyle.
- Outdoors.
- Outer lakes.
- Polluted lakes.
- The lake (x6).
- The lakes (x15).
- Trout.

Comments coded to “attractions/activities/things to do”:

- A lot to offer.
- Fishing (x2).
- Fun place to live.
- Fun.
- Gambling.
- Gardens.
- Government Gardens.
- Great things to do.
- Interesting things to do.
- Leisure.
- Limited interests.
- Luge.
- Luge.
- Maori Village.
- Mountain biking (x2).
- Recreation.
- Skyline Skyrides.
- Sports.
- Stock cars.
- Tourism attractions.
- Tourist attractions.
- Whaka Thermal Village.
- Zorb.

Comments coded to “Maori/Maori culture”:

- Cultural activities.
- Cultural (x2).
- Maori concerts (x3).
- Maori culture (x6).
- Maori population.
- Maori things.
- Maori tourism.
- Maori (x4).

- People - Maori.

Comments coded to “shopping/business/industry”:

- Fat dog café.
- Forestry industry.
- Forestry (x4).
- Good business centre.
- Good environment to work in.
- Lack of business opportunities.
- Lack of commercial growth.
- Logging.
- Nice cafes.
- Retail outlets.
- Saw mills.
- Science.
- Shops.
- Small businesses.

Comments coded to “central location”:

- Access to Auckland.
- Central location.
- Central (x4).
- Good location.
- Location central.
- Location (x5).

Comments coded to “family/friends/family history”:

- Family.
- Good family place.
- Good place to raise a family.
- Home (x4).
- Where I live.

Comments coded to “friendly people”:

- Friendly people.
- Friendly place.
- Friendly (x2).
- Good people (x2).
- Hospitality.
- People.

Comments coded to “weather/climate”:

- Agriculture.
- Cold winter.
- Cold (x3).
- Good weather.
- Temperature - colder.

Comments coded to “lifestyle”:

- Casual lifestyle.
- Good lifestyle.
- Good place to live.
- Nice place to live (x2).
- Small town feel.

Comments coded to “crime/dishonesty”:

- Crime rate.
- Crime (x2).

- Dishonest.
- High crime.

Comments coded to “attractive/clean town”:

- Attractive.
- City centre.
- Lovely tidy city.

Comments coded to “other”:

- Backwards local government.
- Catching up.
- Convenient.
- Customers that don't pay.
- Easy to travel around.
- Expensive.
- Good centre for Central North Island.
- Growing.
- Investment homes.
- Nice place.
- Not big enough population.
- Poor town.
- Provincial.
- Reasonably priced.
- Rural.
- Unemployment levels high.
- Variety.
- Vibrancy.

Respondents were asked how they felt about different aspects of Rotorua to live, work and learn in.

Table 134 - Geographic location (proximity to other places)

	Number	Percent
Excellent	30	28.3%
Good	46	43.4%
Average	23	21.7%
Poor	6	5.7%
Very poor	0	0.0%
Don't know	1	0.9%
Not specified	0	0.0%
Total	106	100.0%

A total of 71.7% of respondents thought that Rotorua was a good or excellent geographical location.

Table 135 - Economy

	Number	Percent
Excellent	0	0.0%
Good	39	36.8%
Average	41	38.7%
Poor	12	11.3%
Very poor	2	1.9%
Don't know	12	11.3%
Not specified	0	0.0%
Total	106	100.0%

No respondents thought that the economy in Rotorua was excellent but 36.8% thought that it was good. Nearly 40% of respondents thought that the economy in Rotorua was average.

Table 136 - Business environment

	Number	Percent
Excellent	4	3.8%
Good	49	46.2%
Average	35	33.0%
Poor	8	7.5%
Very poor	1	0.9%
Don't know	9	8.5%
Not specified	0	0.0%
Total	106	100.0%

Nearly half of the respondents to this survey thought that the business environment in Rotorua was good. Just under a third of respondents thought the business environment was average.

Table 137 - Cost of setting up business/investing

	Number	Percent
Excellent	3	2.8%
Good	31	29.2%
Average	38	35.8%
Poor	10	9.4%
Very poor	3	2.8%
Don't know	21	19.8%
Not specified	0	0.0%
Total	106	100.0%

A total of 35.8% of respondents thought that the cost of setting up businesses and investing in Rotorua was average. Nearly 30% thought that this aspect of Rotorua was good. Nearly 20% of respondents to this survey did not know.

Table 138 - Business support

	Number	Percent
Excellent	9	8.5%
Good	36	34.0%
Average	19	17.9%
Poor	9	8.5%
Very poor	5	4.7%
Don't know	28	26.4%
Not specified	0	0.0%
Total	106	100.0%

While 34% of respondents thought that business support in Rotorua was good, 26.4% of respondents did not know.

Table 139 - Business opportunities

	Number	Percent
Excellent	6	5.7%
Good	43	40.6%
Average	29	27.4%
Poor	15	14.2%
Very poor	2	1.9%
Don't know	11	10.4%
Not specified	0	0.0%
Total	106	100.0%

A total of 40.6% of respondents thought the business opportunities in Rotorua were good and 27.4% of respondents thought that they were average. Nearly 15% of respondents thought that they were poor.

Table 140 - Legislation/compliance

	Number	Percent
Excellent	1	0.9%
Good	29	27.4%
Average	27	25.5%
Poor	16	15.1%
Very poor	10	9.4%
Don't know	23	21.7%
Not specified	0	0.0%
Total	106	100.0%

There were a mixture of responses to the question about legislation and compliance in Rotorua. A total of 21.7% of respondents to this telephone survey did not know about this aspect of Rotorua.

Table 141 - Labour force

	Number	Percent
Excellent	2	1.9%
Good	31	29.2%
Average	36	34.0%
Poor	23	21.7%
Very poor	3	2.8%
Don't know	11	10.4%
Not specified	0	0.0%
Total	106	100.0%

A total of 34% of respondents thought the labour force was average in Rotorua and 29.2% thought the labour force was good.

Table 142 - Weather/climate

	Number	Percent
Excellent	8	7.5%
Good	50	47.2%
Average	40	37.7%
Poor	7	6.6%
Very poor	0	0.0%
Don't know	1	0.9%
Not specified	0	0.0%
Total	106	100.0%

There were 54.7% of respondents who thought that the weather and climate in Rotorua was good or excellent.

Table 143 - Tourism industry

	Number	Percent
Excellent	58	54.7%
Good	36	34.0%
Average	11	10.4%
Poor	0	0.0%
Very poor	0	0.0%
Don't know	1	0.9%
Not specified	0	0.0%
Total	106	100.0%

The tourism industry received a very high rating by respondents with 54.7% of them rating the industry as excellent in Rotorua and 34% of them rating it as good. No respondent rated this aspect of Rotorua as poor.

Table 144 - Safety

	Number	Percent
Excellent	0	0.0%
Good	52	49.1%
Average	36	34.0%
Poor	11	10.4%
Very poor	4	3.8%
Don't know	3	2.8%
Not specified	0	0.0%
Total	106	100.0%

Just under half of the respondents to this telephone survey thought that the safety in Rotorua was good however 34% thought that it was average. Just over 10% of respondents rated this aspect of Rotorua as poor.

Table 145 - Employment opportunities

	Number	Percent
Excellent	0	0.0%
Good	40	37.7%
Average	32	30.2%
Poor	16	15.1%
Very poor	1	0.9%
Don't know	16	15.1%
Not specified	1	0.9%
Total	106	100.0%

There was a mixture of responses to the question on employment opportunities in Rotorua. There were 37.7% of respondents who thought the opportunities were good, 30.2% thought that they were average and 15.1% thought that they were poor. There were 15.1% who did not know.

Table 146 - Infrastructure

	Number	Percent
Excellent	7	6.6%
Good	59	55.7%
Average	29	27.4%
Poor	6	5.7%
Very poor	2	1.9%
Don't know	3	2.8%
Not specified	0	0.0%
Total	106	100.0%

Over 50% of the respondents thought that the infrastructure in Rotorua was good and 6.6% of respondents thought that it was excellent.

Respondents were asked to make any other comments which are listed below.

Comments specified:

- Depending on industry labour is dependant on cultural/socio-economic level/status.
- For business support, Chamber of Commerce = 4 (good) and Council = 1 (very poor).
- For business support, Chamber of Commerce = 5 (excellent) and Council = 2 (Poor).
- Need an international airport.
- Need Tasman flights at airport. Rotorua airport needs to be up-graded to take flights from Australia.
- RDC and the police are pro active in fighting crime in the central city, so Rotorua is becoming a safer place.
- Rooding doesn't cope when there is a big event on. We need a trans-Tasman airport.
- Rotorua Airport has poor flight options for people wanting to get here and back in a day for business. Electrical power structure is poor (Unisen).
- Rotorua doesn't cope with extra traffic, like when there is a big event on, traffic comes to a standstill.
- Would like to see more acknowledgement of cyclists on our roads.

Respondents were asked what perceptions they have about investing in Rotorua.

Table 147 - Investing perceptions

	Number	Percent
Extremely positive	6	5.7%
Positive	39	36.8%
Average	44	41.5%
Negative	10	9.4%
Extremely negative	0	0.0%
No perceptions	6	5.7%
Not specified	1	0.9%
Total	106	100.0%

The response to this question was mixed with 41.5% of respondents having an average perception of investing in Rotorua and 36.8% having a good perception. There were just less than 10% who did not know.

Comments for a "positive" perception:

- Provided you have a co-operative council. RDC isn't supportive.
- Rotorua costs less than other centres.

Respondents were asked what perceptions they had about setting up and doing business in Rotorua.

Table 148 - Setting up business perceptions

	Number	Percent
Extremely positive	3	2.8%
Positive	43	40.6%
Average	36	34.0%
Negative	12	11.3%
Extremely negative	2	1.9%
No perceptions	10	9.4%
Not specified	0	0.0%
Total	106	100.0%

There was also a mixed response to how respondents felt about setting up and doing business in Rotorua. A total of 40.6% had a positive response and 34% had an average response. There were 11.3% who did not know.

Comments for an “extremely positive” perception:

- Depending on what type of business.

Comments for an “average” perception:

- Depends on the business.
- Ministry funding available.
- Really depends on business.

Comments for a “negative” perception:

- Low income town, fuel prices are having a big effect. Tourism downturn.
- Rotorua has a major planning problem with resource consents.

Respondents were asked for their perceptions about aspects of living in Rotorua? The following tables list their responses.

Table 149 - Housing

	Number	Percent
Extremely positive	21	19.8%
Positive	50	47.2%
Average	23	21.7%
Negative	4	3.8%
Extremely negative	0	0.0%
No perceptions	8	7.5%
Not specified	0	0.0%
Total	106	100.0%

There were 67% of respondents who rated housing in Rotorua as positive or extremely positive. Only 21.7% thought the housing was average.

Reasons specified:

- Housing is cheap. Quality is lower than other areas.

Table 150 - Education

	Number	Percent
Extremely positive	5	4.7%
Positive	45	42.5%
Average	25	23.6%
Negative	11	10.4%
Extremely negative	1	0.9%
No perceptions	19	17.9%
Not specified	0	0.0%
Total	106	100.0%

A total of 42.5% of respondents thought that the quality of education in Rotorua was positive. There were 23.6% of respondents who thought the quality of education was average and 10.4% who thought it was negative.

Reasons specified:

- Standard of schooling is poor when compared to Auckland.

Table 151 - Lifestyle

	Number	Percent
Extremely positive	34	32.1%
Positive	47	44.3%
Average	16	15.1%
Negative	5	4.7%
Extremely negative	1	0.9%
No perceptions	3	2.8%
Not specified	0	0.0%
Total	106	100.0%

As with other surveys in this study, lifestyle scored highly by respondents with 76.4% who thought that this aspect of Rotorua was positive or extremely positive.

Reasons specified:

- Good for family, poor for young people.

Table 152 - Access to amenities

	Number	Percent
Extremely positive	29	27.4%
Positive	58	54.7%
Average	13	12.3%
Negative	0	0.0%
Extremely negative	0	0.0%
No perceptions	6	5.7%
Not specified	0	0.0%
Total	106	100.0%

Access to amenities also rated well with 82.1% of respondents who thought this aspect of Rotorua was positive or extremely positive.

Table 153 - Access to outdoor environment

	Number	Percent
Extremely positive	62	58.5%
Positive	40	37.7%
Average	0	0.0%
Negative	0	0.0%
Extremely negative	1	0.9%
No perceptions	3	2.8%
Not specified	0	0.0%
Total	106	100.0%

Over 50% of respondents rated access to the outdoor environment as extremely positive and nearly 40% rated it as positive.

Respondents were asked for three things that they thought would improve the Rotorua District as a good place to invest and set up business.

Table 154 - Suggested improvements

	Number	Percent
Jobs/industry/investment	29	27.4%
Council	15	14.2%
Other infrastructure improvements	13	12.3%
Promotion of Rotorua	13	12.3%
Town improvements	9	8.5%
Crime/safety	8	7.5%
Airport	7	6.6%
Education	5	4.7%
Environment/lakes	4	3.8%
Attraction improvements	1	0.9%
Events/attractions	1	0.9%
Parking	1	0.9%
Public transport	1	0.9%
Other	10	9.4%
Sample	106	

The most common responses were under the categories jobs/industry/investment, council, promotion of Rotorua and other infrastructural improvements. The comments given are listed below by category.

Suggested improvements coded to “jobs/employment/business”

Idea	Reason
Attract a Crown research institute.	It would provide employment and benefit the Rotorua community over all.
Attract big business to Rotorua.	There is a lack of manufacturing businesses.
Council needs to be pro active in bringing business to Rotorua.	We need more businesses to grow the region.
Create strategies/actions to fulfil those objectives.	All these to attract more business/investment.
Develop better relationships with Auckland businesses so they can work together.	
Develop work-force for house-building.	
Encourage construction of high quality hotels.	To keep the tourism industry growing.
Encourage large domestic businesses to the area. Council needs to make it easy for businesses to set up here.	Rotorua needs more large businesses to grow.
Establish an investment fund for big business.	To attract large businesses to re-locate to Rotorua.

Idea	Reason
Expand the "street" café area.	
Get business leaders to create market planning.	
Give businesses financial benefits to set up in Rotorua eg, cheaper rates.	RDC don't make it easy to do business.
Have retail sector open 24/7.	Shopping hours are too limited, so people shop outside of Rotorua.
If council could make loans to small business to set-up businesses in the central city, it would be a help. Many people have great ideas but not the finances.	Town looks so run down with about 60 empty shops.
Improve the labour market.	Staff with good work ethic are hard to find.
Improve the wage rates to attract people to work here.	Pay rates in Rotorua are lower than average.
Increase availability of information on setting up business in Rotorua.	There isn't easy access to information on setting up business in Rotorua.
Increase the availability of senior management staff in all sectors.	This is a problem in Rotorua.
Industrial premises made more available.	Shortage of good industrial premises in Rotorua.
Investment put into forestry and mills.	To make it more sustainable long term.
Look to enhance shopping opportunities by attracting some more big shops.	It would bring more out-of-town shoppers.
Make commercial land available.	Lack of industrial land in the right places.
Make more commercial land available.	There is a lack of suitable commercial land.
Offer incentives for small businesses to set up in Rotorua.	
Place to live and work. Encourage more retail businesses	Shops in Rotorua are poor, too many empty shops.
Pour more money into the area, provide new industry.	Not a lot of money around.
Promote the support services available to businesses.	So that people realise it is a supportive business community.
Small industry development, like clothing, weaving, computers (?). We need a change of thinking, more thinking outside the square. We need to be more pro-active, need to get businesses moving in the same direction to help the town grow.	

Suggested improvements coded to "Council"

Idea	Reason
Council needs to communicate better with business community.	RDC doesn't have a lot of contact with the business community.
Council needs to communicate with small businesses. Encourage large domestic businesses to the area. Council needs to make it easy for businesses to set up here.	Council makes decisions without consulting with the businesses that will be affected.
Get Council to be more business friendly. Small businesses especially need to be encouraged and supported.	Rotorua needs more large businesses to grow.
Get council to be more helpful/support with signage.	Council is not supportive of small business in Rotorua.
Help businesses with compliance issues rather than closing them down for not complying.	There is often so much red tape that people don't bother.

Idea	Reason
Make council meet its obligations.	It is accessible but doesn't follow through.
Make RDC more business friendly.	RDC isn't business friendly at all.
More interaction by the council with local business.	Council doesn't get behind local businesses.
Needs to be more help from the council for small businesses.	RDC isn't supportive of business community.
RDC needs to be more "business friendly" and encourage business.	Businesses have moved out of the region because of high costs and red tape.
RDC needs to take the focus off just tourism and support other business ventures.	Council seems to have a focus on just tourism.
Reduce CBD rates.	Poor service for the high rates charged.
Reduce compliance costs.	Provide start up funding for small businesses.
Resource consent and planning process at RDC needs to improve.	RDC makes it very hard to do business.

Suggested improvements coded to "other infrastructure improvements"

Idea	Reason
Better roading connections to Hamilton and Tauranga.	Better access for freight and visitors is needed.
Develop Rotorua's broadband network.	To give Rotorua an advantage over other cities.
Improve telecommunications (eg, broadband).	
Improve the entrance into Rotorua, especially from the north.	Entrance ways into Rotorua are very poor and that is the first impression visitors have of Rotorua.
Improve the infrastructure.	To improve accessibility to Rotorua.
Increase the population and diversify the cultural mix.	It doesn't have the population to support business.
Increase the population base.	There aren't enough people to support the number of businesses in Rotorua.
Increase the population base.	The population is too low to support business.
Increase visitor numbers by increasing tourism promotion.	The tourist industry is flat the moment.
Infrastructure around transport needs improvement.	It is okay, but needs improving as the area grows.
Provide a fibre optic loop around the city.	
Reopen the railway.	It would give easy access to Rotorua.
Restore the rail service.	Easy access for freight to the ports.

Suggested improvements coded to "promotion of Rotorua"

Idea	Reason
Advertise the fact that Rotorua is very central, so it is a good place for manufacturers to do business in.	Most of the promotion of Rotorua is around tourism, it needs to be promoted as a good place to live and work.
Do a good PR job promoting Rotorua as a good place to live with outdoor activities close to hand.	Rotorua is only promoted as a tourist destination, not a place to live or work.
Have less negative publicity about Rotorua in the media.	It gives the public a bad impression of Rotorua that I don't think is warranted.
Improve the image of Rotorua as a good place to live and work.	Rotorua's tourism industry is always promoted.

Idea	Reason
Market Rotorua as a Central North Island hub for many markets.	
Promote Rotorua as a good place to live and work.	We don't hear much about Rotorua down here.
Promote the positive things that Rotorua has to offer as place to live and do business.	Rotorua is mainly promoted as a tourist destination.
Promotion of Rotorua offshore.	
Raising the profile of Rotorua outside of tourism.	No PR on any other aspects of Rotorua.
Rotorua needs to be marketed as a family holiday weekend.	No marketing in this area at present yet it is a great place for a weekend break.
Rotorua needs to be marketed for its outdoor opportunities and sport.	Don't just market towards tourist attractions.
To raise the profile of Rotorua as a good place to live and work.	Most of the promotion is for tourists.
What are strengths:- look into wider promoting, eg, forestry.	

Suggested improvements coded to "town improvements"

Idea	Reason
Concentrate on central business district and not on the mall.	I would like to see the empty shops filled.
Get rid of the mall.	I has divided the retail sector.
Have better city planning that unites the city.	
In some way get rid of all the empty shops in town, even if this means moving some of the more out lying shops to fill empty premises.	It isn't a good look to have so many empty shops, it looks like the place is run down.
Make the layout of the city easier to navigate. Modernise and brighten the town as it is very dull with no bright colours.	Town is poorly structured, lack of colour and needs modernising. It is hard to find places in town if you don't know the area.
Make the mall more user friendly, like having a cover over it.	
Open up new sub-divisions.	To encourage people to buy in Rotorua.
Tidy up shabbiness of town centre and fringes.	
To have the whole of the retail area together.	The mall has separated the retail area, now there are many empty shops in the CBD.

Suggested improvements coded to "crime/safety"

Idea	Reason
Decrease crime stats.	High crime has a big impact on people visiting Rotorua.
Improve central city safety.	There is high crime in the central city.
Reduce crime, especially in the central business district.	Young people on the streets cause havoc.
Reduce the crime.	High levels of crime in Rotorua.
Reduce the crime.	There is too much theft from cars and it isn't safe to go into town at night.
Tackle crime problems.	Rotorua is not safe. There has been wide media coverage of safety issues.
Tackle the personal safety issue.	Rotorua is being seen as an unsafe place.
Try to reduce crime.	Rotorua has a high crime rate.

Suggested improvements coded to “airport”

Idea	Reason
International airport would make a difference.	Many tourists by pass Rotorua because of extra costs getting here.
International airport.	It would increase tourist nights by 1-2 days and would benefit the Rotorua economy.
International flights into Rotorua.	Would have a positive effect on the Rotorua economy.
Provide an international airport.	It would increase tourist numbers.
Upgrade airport to take Trans Tasman flights.	Would provide more access and easier access to Rotorua.
Upgrade the airport to an international airport.	For export and business growth, an international airport is necessary.

Suggested improvements coded to “education”

Idea	Reason
Attract a university.	To increase tertiary study available in the area.
Have more training schemes for youth.	To provide better employment opportunities for youth.
Improve education and skills of the workforce.	Doing this might address some of the social issues in Rotorua.
Upgrade the technical skills of the workforce.	There is a lack of skilled workers.
Upskill the labour force.	Lack of skilled workers.

Suggested improvements coded to “environment/lakes”

Idea	Reason
Clean up the lake.	
Clean up the lakes.	They are destroying the clean green image.
Improve the quality of the lakes.	
Lake water quality needs to be addressed.	Sewerage problems need to be resolved.

Suggested improvements coded to “events/attractions”

Idea	Reason
Cater to outdoor activities/sports.	
Have more events.	Rotorua is under used as an events centre.

Suggested improvements coded to “parking”

Idea	Reason
Better parking facilities, especially a safe area for camper vans close to town.	

Suggested improvements coded to "public transport"

Idea	Reason
Improve transport into/out of Rotorua.	

Suggested improvements coded to "other"

Idea	Reason
Address the negative cultural issues that Rotorua faces at times.	
Get all the Maori Trust heads together to work together to grow Rotorua.	
Get rid of RMA (Resource Management Act).	Too much red tape.
Get rid of RMA, too much red tape.	Council makes it so hard to operate a business with the resource management act.
Get rid of Tribal law - treaty law.	Things would run much better without this.
Get RMA changed to limit amount of consultation needed.	To limit beauracracy.
Identify objectives to be achieved.	
Make the connection with Auckland's economy more transparent.	
Raise service levels in hotels and motels. It is very poor.	Low service levels must have an effect on tourists.
Try to keep tourists here for more than just a couple of days.	Tourists just visit the main attractions and leave Rotorua after a couple of days as there is nothing to hold them here.

Respondents were asked what would assist them in making a decision to invest and/or set up business in the Rotorua District.

Table 155 - Assist decision making process

	Number	Percent
Pamphlet/booklet/publication	24	22.6%
DVD/video	20	18.9%
Profiles of business successes	27	25.5%
Website	38	35.8%
Personal contact with economic development unit	36	34.0%
Investors' 'tour' of Rotorua	25	23.6%
Personal contact with current Rotorua investors	34	32.1%
Other	14	13.2%
Sample	106	

The most popular choices for assistance with investment decisions were a website, personal contact with an economic development unit, profiles of business successes and an investor's tour of Rotorua.

Other specified:

- Contact with existing businesses.
- Don't know.
- Information on Rotorua business mix.
- Information, re: commercial property supply and compliance costs and transport.
- Innovative structuring of rates, rents, ie, financial support for start-ups.
- Knowledge of other businesses operating in the area.
- Mentoring (x5).
- Nothing.
- Seeding of funding, medical services, hydroponics, development of export markets, retrofitting of houses.
- Television advertising to show what investors would gain in living here.

Respondents were asked if there were any personal reasons for not considering Rotorua as a place to invest and do business.

Table 156 - Personal reasons for not considering Rotorua

	Number	Percent	% ex non spec
Yes	13	12.3%	27.1%
No	35	33.0%	72.9%
Not specified	58	54.7%	
Total	106	100.0%	100.0%

Note: % ex non spec is the percentage with not specified answers removed

Over 70% of respondents said there were no personal reasons for not considering Rotorua as a place to invest and do business.

Comments specified:

- Family ties.
- Happy where I am.
- High crime rate.
- I don't like living in Rotorua.
- I'm a South Islander and that is where I would want to invest.
- I'm not into business/no desire. I like coast, not Rotorua area.
- My family networks are based in Auckland.
- Perception of enough population and competition from Taupo and Tauranga, harsh environment.

- Perception of public safety.
- Perception that it is not a growing area.
- Prefer Tauranga (beach, more people - my sort).
- Prefer to live where I am.
- Small population. Poor for business.
- Too far from Auckland.

Respondents gave comments regarding Rotorua as a place to live, work and learn. These comments are listed below.

Comments specified:

- Attracting the correct employees is a problem, there is a skill shortage.
- Because of Rotorua's central location, it is a good place to do business.
- Business diversity is very low. There are not that many different business sectors when compared to places like Taupo and Tauranga and I think this discourages people investing and setting up business in Rotorua.
- Council aren't doing a good job in investing in the infrastructure of the city, we don't get value for our rates.
- Council has a bias of supporting the big operators in the tourism industry only and forgetting about small business operators.
- Depending on the type of business, eg, tourism or adventure sports, it could do well in Rotorua.
- Development fees are excessive for people wanting to invest in Rotorua and in many cases investors have gone elsewhere.
- I don't know enough to comment.
- I think Rotorua should concentrate on what it does well - tourism. The population base is too small to support introducing more business.
- I would like to see more growth in the area.
- I would never consider doing business in Rotorua as it has the highest theft crime rate in New Zealand.
- Investigate the type of business, its viability in Rotorua and the location before setting up the business as some businesses don't work in Rotorua.
- It has a strong agricultural economy in the area which is never promoted.
- RDC is the biggest hindrance to doing business, it doesn't support business.
- RDC needs to either drop the rates or offer incentives so that the empty shops in town are filled. They need to move quickly on this as CBD is looking very run down.
- Rotorua District Council has to make it easy to set up a business in Rotorua. At the moment with all the problems getting consents etc, it becomes too hard and people go elsewhere.
- Rotorua has a lot of upsides to it but it is unfortunate that it is losing its young people and the population is not growing.
- Rotorua has all the right factors to be a successful business centre.
- Rotorua has some positive opportunities ahead. It should capture the 'returning from overseas' market eg, baby boomers returning to New Zealand to retire.
- Rotorua is a good place to do business if you are in tourism or a related industry.
- Rotorua is a good place to invest, property prices are cheaper than other parts of New Zealand both commercial and residential properties.
- Rotorua is very central, because of the size of our city we are not hindered by traffic problems. Costs are lower here, but there is a lack of skilled people.
- Rotorua is very forward thinking and well organised. There is good support from the Rotorua District Council and the Economic Development Unit.
- Rotorua is very sensitive to things, like fuel price increases, tourism and forestry down turns. It is a low income area, so business conditions can be hard.
- Rotorua needs to have strong links with Tauranga for the export sector in regards to the port. Rotorua needs a Trans Tasman airport.
- Rotorua provides good opportunities as other places and it is starting to grow.
- Rotorua residents under value Rotorua.

- The economy has been up and down because of forestry and this has a bearing on how much we are prepared to invest.
- The economy is flat line here, it has been for the last three years. We need to encourage more visitors to Rotorua.
- The tourism and forest industries need to be encouraged. If something could be done to improve the forestry industry it would benefit Rotorua. Maybe this would need assistance from the government.
- There is a clear link between the Auckland economy and the Rotorua economy. Auckland is not the competition as it is seen. There is a need to increase the knowledge base of economic planning in Rotorua.
- There is a great opportunity for Rotorua to promote itself as a Central North Island hub but it is not doing so.
- There is a lot of opportunity in Rotorua, but you have to know the market. It is no good setting up a shop and hoping it will do well, you need to research markets and location.
- There isn't enough population base to support business in Rotorua.
- We need to develop closer ties with Tauranga.
- We need to have a trans tasman airport in Rotorua, it would have positive economic benefits across Rotorua.
- Would depend on what kind of business, must be environmentally responsible.

Respondents were asked what industry they usually work in.

Table 157 - Industry

	Number	Percent
Agriculture/Horticulture	1	0.9%
Fishing/Forestry/Logging	2	1.9%
Mining/Quarrying	1	0.9%
Manufacturing	6	5.6%
Electricity/Gas/Water Supply	1	0.9%
Communication services	3	2.8%
Business services	19	17.8%
Construction	5	4.7%
Wholesale trade	1	0.9%
Retail trade	21	19.6%
Tourism/Hospitality/Accommodation	18	16.8%
Government agency	8	7.5%
Education	2	1.9%
Other	19	17.8%
Not specified	0	0.0%
Total	107	100.0%

The main representative industry groups of the respondents were retail trade, business services, other and tourism/hospitality/accommodation.

Other specified:

- AA Automobile Association.
- Community funding/social services/volunteer.
- Engineering Consultant.
- Film and television.
- Film industry.
- Liquid waste disposal.
- Media.
- Mental health.
- Professional health consulting.
- Property development.
- Real Estate (x4).
- Transport (x3).

- Vet.
- Visual arts film media.

There were 54.7% of respondents to the survey who were male and 45.3% who were female.

Table 158 - Gender

	Number	Percent
Male	58	54.7%
Female	48	45.3%
Not specified	0	0.0%
Total	106	100.0%

The most popular age group to answer the survey was those between 40-49 years.

Table 159 - Age

	Number	Percent
16-20	1	0.9%
21-29	5	4.7%
30-39	18	17.0%
40-49	42	39.6%
50-59	27	25.5%
60-69	11	10.4%
70+	2	1.9%
Refused	0	0.0%
Not specified	0	0.0%
Total	106	100.0%

Over 50% of respondents were from Rotorua and 21.7% were from Auckland.

Table 160 - Place of residence

	Number	Percent
Auckland	23	21.7%
Northland	1	0.9%
Bay of Plenty	4	3.8%
Rotorua	57	53.8%
Canterbury	7	6.6%
Otago	0	0.0%
Nelson	1	0.9%
Wellington	5	4.7%
Waikato	2	1.9%
West Coast	0	0.0%
Hawke's Bay	2	1.9%
Manawatu	1	0.9%
Wanganui	1	0.9%
Gisborne	2	1.9%
Marlborough	0	0.0%
Taranaki	0	0.0%
Tasman	0	0.0%
Southland	0	0.0%
Overseas	0	0.0%
Other	0	0.0%
Not specified	0	0.0%
Total	106	100.0%

There were a variety of lengths of time that respondents had been operating their businesses but nearly a third had been for over twenty years.

Table 161 - Length of time operating business

	Number	Percent
Less than 1 year	1	0.9%
1-3 years	9	8.5%
4-5 years	9	8.5%
6-10 years	28	26.4%
11-15 years	18	17.0%
16-19 years	6	5.7%
20 years +	35	33.0%
Refused	0	0.0%
Not specified	0	0.0%
Total	106	100.0%

11.1 Key points from the telephone survey – live, work and learn:

- Business respondents rated the following as the three things that come to mind when thinking about Rotorua:
 - Geothermal activity/smell/geysers
 - Tourist destinations
 - Lakes/nature/scenery
- A majority of businesses rated the geographic location and the tourism industry as good or excellent in Rotorua.
- A majority of business respondents rated the economy, the business environment, the cost of setting up business/investing, business support, business opportunities, legislation/compliance, the labour force, weather/climate, employment opportunities and infrastructure in Rotorua as average or good.
- There were some concerns with 21.7% of the respondents rating labour force as poor, 15.1% of respondents rating employment opportunities as poor and over 10% rating safety, economy, business opportunities and legislation/compliance as poor.
- A total of 42.5% of business respondents rated investing in Rotorua as positive or extremely positive. There were 41.5% who rating investing in Rotorua as average.
- A total 43.4% of businesses had a positive or extremely positive perception about setting up business in Rotorua. Just over a third of businesses (34%) rated setting up and doing business in Rotorua as average.
- A majority of businesses perceived the quality and affordability of housing in Rotorua was positive or extremely positive.
- The majority of businesses were positive or extremely positive about lifestyle, access to amenities and access to the outdoor environment.
- The majority of businesses rated the quality of education as average or positive.
- The three most selected activities businesses would choose to improve Rotorua were:
 - Jobs/industry/investment
 - Council
 - Other infrastructure improvements and promotion of Rotorua
- A total of 35.8% of business respondents chose a website as a means to assist them in making a decision about to invest in Rotorua.
- There were 34% of business respondents who thought personal contact with an economic development unit would be helpful and 32.1% chose personal contact with current Rotorua investors.

12.0 ONLINE SURVEY

Respondents were asked when they are thinking about Rotorua, what were the first three things that came into their mind. The following table contains their responses.

Table 54: Thoughts about Rotorua

	Number	Percent
Shopping/business/industry	10	66.7%
Central location	4	26.7%
Lakes/nature/scenery	4	26.7%
Tourist destination	3	20.0%
Geothermal activity/smell/geysers	2	13.3%
Lifestyle	2	13.3%
Maori/Maori culture	2	13.3%
Attractions/activities/things to do	1	6.7%
Crime/dishonest	1	6.7%
Other	10	66.7%
Sample	15	

Note: Not additive as respondents could identify multiple things

Comments coded to “shopping/business/industry”:

- Business property growth is limited and limiting.
- Council is more of a hindrance than a support.
- Encourage more local purchasing.
- Expanding business.
- Good industry base.
- Great place to run my business.
- Lots of timber industries.
- Need more big business / employers
- Not enough light industrial sites available.
- Poor light and medium engineering support services.

Comments coded to “central location”:

- Central locality.
- Central location (x2).
- Location.

Comments coded to “lakes/nature/scenery”:

- Natural beauty.
- Outdoors.
- The lakes (x2).

Comments coded to “tourist destination”:

- Tourism.
- Tourists.
- Vibrant tourism economy.

Comments coded to “geothermal activity/smell/geysers”:

- Geothermal.
- Hot pools.

Comments coded to “lifestyle”:

- Lifestyle balance.
- Lifestyle.

Comments coded to "Maori/Maori culture":

- Maori culture.
- Maori.

Comments coded to "attractions/activities/things to do":

- Mountain biking.

Comments coded to "crime/dishonesty":

- Unemployment-crime

Comments coded to "other":

- Backwater.
- Cheaper environment.
- Concerned about the lack of growth.
- Consider it has significant potential.
- Difficult to access overseas.
- It needs a positive attitude towards growth.
- Limited high-paying locals for business/retail.
- Lower social-economic area.
- Safe.
- Too much leasehold land.

Respondents were asked to give comments on various aspects of setting up business or investing in Rotorua. The following tables contain their responses.

Table 55: Geographic location (proximity to other places)

	Number	Percent
Excellent	3	20.0%
Good	7	46.7%
Average	3	20.0%
Poor	2	13.3%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	0	0.0%
Total	15	100.0%

There were 46.7% of respondents who thought that Rotorua was a good location to set up a business or invest in. A quarter of respondents thought it was an excellent place to invest in.

Table 56: Economy

	Number	Percent
Excellent	0	0.0%
Good	5	33.3%
Average	6	40.0%
Poor	2	13.3%
Very poor	1	6.7%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Just over a third of respondents thought that the economy in Rotorua was good to set up a business or to invest in. A total of 40% thought the economy in Rotorua was average.

Table 57: Business environment

	Number	Percent
Excellent	0	0.0%
Good	6	40.0%
Average	6	40.0%
Poor	1	6.7%
Very poor	1	6.7%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

There were 40% of respondents who thought the business environment was average and 40% of respondents who thought the business environment was good.

Table 58: Safety

	Number	Percent
Excellent	0	0.0%
Good	0	0.0%
Average	9	60.0%
Poor	3	20.0%
Very poor	1	6.7%
Don't know	0	0.0%
Not specified	2	13.3%
Total	15	100.0%

No respondents to this online survey thought that the safety in Rotorua was good or excellent. A high 60% thought that safety was only average.

Table 59: Cost of setting up business/investing

	Number	Percent
Excellent	0	0.0%
Good	9	60.0%
Average	3	20.0%
Poor	1	6.7%
Very poor	0	0.0%
Don't know	1	6.7%
Not specified	1	6.7%
Total	15	100.0%

A total of 60% of respondents thought that the cost of setting up business and investing in Rotorua was good. Only 20% thought that it was average and only 6.7% thought that it was poor.

Table 60: Business support

	Number	Percent
Excellent	6	40.0%
Good	2	13.3%
Average	4	26.7%
Poor	2	13.3%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Business support received a very high rating from this survey with 40% of respondents rating business support in Rotorua as excellent. Another 13.3% thought this support was good and 26.7% thought business support was average.

Table 61: Business opportunities

	Number	Percent
Excellent	0	0.0%
Good	6	40.0%
Average	6	40.0%
Poor	2	13.3%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

A total 40% of respondents thought that the business opportunities in Rotorua were good and 40% thought that they were average.

Table 62: Legislation/compliance

	Number	Percent
Excellent	0	0.0%
Good	1	6.7%
Average	6	40.0%
Poor	4	26.7%
Very poor	1	6.7%
Don't know	2	13.3%
Not specified	1	6.7%
Total	15	100.0%

Although a total of 40% of respondents thought that legislation/compliance in Rotorua was average, 26.7% thought the legislation/compliance was poor and 6.7% thought it was very poor.

Table 63: Labour force

	Number	Percent
Excellent	0	0.0%
Good	3	20.0%
Average	7	46.7%
Poor	2	13.3%
Very poor	2	13.3%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

A total of 26.9% of respondents thought the labour force was poor or very poor in Rotorua. Only 20% of respondents thought that it was good and 46.7% thought that it was average.

Table 64: Weather/climate

	Number	Percent
Excellent	1	6.7%
Good	7	46.7%
Average	5	33.3%
Poor	0	0.0%
Very poor	1	6.7%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

A total of 46.7% of respondents thought the climate was good and 6.7% thought that it was excellent. Only 33.3% of respondents thought that it was average.

Table 65: Tourism industry

	Number	Percent
Excellent	4	26.7%
Good	8	53.3%
Average	1	6.7%
Poor	1	6.7%
Very poor	0	0.0%
Don't know	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Over 50% of respondents thought that the tourism industry was good and 26.7% thought that it was excellent.

Respondents had the opportunity to make further comments that are listed below.

Comments specified:

- A low aspiration labour force is a major challenge in this area. Also there is a lack of diversity of people compared to somewhere like Hamilton which has a thriving Asian population.
- Has not done enough to restore the lakes.
- Rotorua District Council has to become more business friendly. Lower costs and faster service.
- Some Council staff have excellent service skills but some are shocking. We need an air of cooperation. I feel the reverse is the culture.
- We have a major labour shortage especially in the construction and middle management areas.
- You would need to rely heavily on tourist dollars or nearby industry to make a good business succeed in Rotorua. It is a poor city (socio-economics of citizens) and there are two major cities nearby (Tauranga and Hamilton). Specialist or novelty businesses might work, but would need to be well linked and supported.

Respondents were asked what perceptions they have about investing in Rotorua. The following table contains their responses.

Table 66: Investing perceptions

	Number	Percent
Extremely positive	0	0.0%
Positive	6	40.0%
Average	4	26.7%
Negative	3	20.0%
Extremely negative	1	6.7%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

A total of 40% of respondents had a positive perception about investing in Rotorua and 26.7% of respondents had an average perception. Listed below are the comments for each of the perception types.

Comments for a "positive" perception:

- Because I know the area. Lots of businesses don't and would need the confidence from other role models.

- Rotorua socio-economic make up makes Rotorua a tough market but I feel I have a handle on it which gives me confidence. Plus I feel top operators choose other lifestyle areas over Rotorua ie, Tauranga, Queenstown and Hawkes Bay.
- Showing signs of growth/needs encouragement from our district leaders.

Comments for an “average” perception:

- Has a single focus on tourism at the expense of promoting the District as a good place to live.
- Parochial self centred.

Comments for a “negative” perception:

- Only in the last year has there been an increase in property values. Low growth.
- Poor labour force and lack of engineering services.

Comments for a “extremely negative” perception:

- Doesn't seem to be going anywhere fast. Limited new industry, tourism overkill, doesn't attract (but should be able to!) entrepreneurs for the lifestyle benefits of the lakes and forests.

Respondents were asked what perceptions they had about setting up business in Rotorua.

Table 67: Setting up business perceptions

	Number	Percent
Extremely positive	0	0.0%
Positive	5	33.3%
Average	5	33.3%
Negative	4	26.7%
Extremely negative	0	0.0%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

A third of respondents had a positive perception about setting up business in Rotorua and a third had an average perception. There were 26.7% of respondents who had a negative perception about setting up business in Rotorua. Listed below are the comments for each of the perception types.

Comments for a “positive” perception:

- Good supporting business network, but need to get out and be seen.
- Lots of opportunities available.
- Rotorua socio-economic make up makes Rotorua a tough market but I feel I have a handle on it which gives me confidence. Plus I feel top operators choose other lifestyle areas over Rotorua ie, Tauranga, Queenstown and Hawkes Bay.

Comments for an “average” perception:

- Compliance and bylaws are a major hurdle.
- Compliance issues have caused blockages.
- Covered above, also my trip overseas includes an additional time and cost of getting to Auckland.
- Growth of population is poor compared to Tauranga and Taupo.

Comments for a “negative” perception:

- Depends on business.
- No strong business culture to support you.
- Property availability, new premises.

Respondents were asked what perceptions they have about various aspects of living in Rotorua. The following table lists their responses.

Table 77: Housing

	Number	Percent
Extremely positive	2	13.3%
Positive	8	53.3%
Average	4	26.7%
Negative	0	0.0%
Extremely negative	0	0.0%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Housing affordability and quality was rated as positive by 53.3% of respondents to this survey.

Table 78: Education

	Number	Percent
Extremely positive	0	0.0%
Positive	5	33.3%
Average	7	46.7%
Negative	2	13.3%
Extremely negative	0	0.0%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Nearly half (46.7%) of the respondents thought that the quality of education in Rotorua was average. A third of respondents had a positive perception about the quality of education in Rotorua.

Table 79: Lifestyle

	Number	Percent
Extremely positive	7	46.7%
Positive	5	33.3%
Average	2	13.3%
Negative	0	0.0%
Extremely negative	0	0.0%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

A total of 46.7% of respondents rated the lifestyle in Rotorua extremely positively. Another 33.3% gave a positive rating to the lifestyle.

Table 80: Access to amenities

	Number	Percent
Extremely positive	5	33.3%
Positive	7	46.7%
Average	2	13.3%
Negative	0	0.0%
Extremely negative	0	0.0%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

There were 46.7% of respondents who had a positive perception of access to amenities in Rotorua. There was another 33.3% of respondents who had an extremely positive perception of access to amenities in Rotorua.

Table 81: Access to outdoor environment

	Number	Percent
Extremely positive	10	66.7%
Positive	4	26.7%
Average	0	0.0%
Negative	0	0.0%
Extremely negative	0	0.0%
No perceptions	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

There was an extremely positive response to access to the outdoor environment with 66.7% of respondents rating this aspect of Rotorua well. Another 26.7% rated access to the outdoor environment as positive.

Respondents were asked what would assist them in making a decision to invest or set up a business in Rotorua. The following table lists their responses.

Table 82: Assist decision making process

	Number	Percent
Pamphlet/booklet/publication	0	0.0%
DVD/video	3	20.0%
Profiles of business successes	1	6.7%
Website	2	13.3%
Personal contact with economic development unit	1	6.7%
Investors' 'tour' of Rotorua	2	13.3%
Personal contact with current Rotorua investors	3	20.0%
Other	1	6.7%
Not specified	2	13.3%
Total	15	100.0%

Personal contact with Rotorua investors as well as a DVD/video were the most popular choices to this question. An investor's tour and a website were the next two most popular choices.

Other factors on deciding to invest and/or set up business in Rotorua district:

- A combination of all the above.
- A plan that is being implemented to provide growth for the District.
- A proactive approach from Rotorua District Council with a staff culture to match.
- An upward drive of economic development, and growth - some impetus to the location as a place to set up in.
- Most of the above. No one item.
- That there is going to be city growth through realistic strategies.
- Zoning seems to be haphazard for industrial properties. Lots of apparently derelict businesses in Vaughans Road and off Old Taupo Road/Tallyho area.

Respondents were asked if there were any personal reasons for not considering Rotorua as a place to invest and do business.

Table 83: Personal reasons for not considering Rotorua

	Number	Percent
Yes	3	20.0%
No	5	33.3%
Not specified	7	46.7%
Total	15	100.0%

Nearly half of the respondents (46.7%) did not specify an answer to this question.

Comments specified:

- Concern as to safety.
- High schooling for my children would be the number one reason for investing elsewhere.
- Worried about violence/burglary and low socio-economic influence.

Table 84: Wage rates

	Number	Percent
Extremely Positive	1	6.7%
Positive	5	33.3%
Average	7	46.7%
Negative	1	6.7%
Extremely Negative	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Nearly half of the respondents (46.7%) rated wage rates in Rotorua as average and only 33.3% of respondents rated them as good.

Table 85: Career progression

	Number	Percent
Extremely Positive	0	0.0%
Positive	3	20.0%
Average	8	53.3%
Negative	3	20.0%
Extremely Negative	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Just over half of respondents (53.3%) rated career progression in Rotorua as average and 20% of respondents rated career progression as negative. Only 20% of respondents to this online survey rated career progression as positive.

Table 86: Transport links to city

	Number	Percent
Extremely Positive	1	6.7%
Positive	9	60.0%
Average	3	20.0%
Negative	0	0.0%
Extremely Negative	1	6.7%
Not specified	1	6.7%
Total	15	100.0%

Transport links to Rotorua were rated well with 66.7% of respondents rating them as positive or extremely positive.

Table 87: Roothing

	Number	Percent
Extremely Positive	0	0.0%
Positive	8	53.3%
Average	6	40.0%
Negative	0	0.0%
Extremely Negative	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

While 53.3% of respondents had a positive perception of roading in Rotorua there were 40% who had an average perception.

Respondents were asked what three things they would choose to improve Rotorua as a good place to like work and learn. The following is a list of their responses.

Comments specified:

- A decent creditable 3rd leaning institute. 2. Tidy up the industrial zones. 3. Encourage in more light engineering support services.
- Approve the continuation of 4 lanes all the way along Fairy Springs Road. Support the redevelopment of QE Health. Engage more women in top level positions (board members, business directors).
- Attract a new industry development, which will attract service sector, and bring people and jobs to city. Work on bringing in the tourist dollars, like Christchurch and Queenstown are doing. Need better services, facilities and marketing. No gimmicks! Rotorua used to be the top tourism location, now resting on its laurels. Better business environment, especially retail. Present retail environment is appalling! A city shouldn't have for lease signs up in the central city, unfilled for months on end! What's going on? Need to get to the bottom of this one and fix it!
- Change New Zealanders views of Rotorua. Get youth off the city streets. Raise Rotorua's profile by attracting more New Zealanders to holiday here. They might stay.
- Get businesses and the city behind restoring the lakes. Encourage an environment that fosters growth of permanent residents. Focus on the consequence of climate warming and the desirability of the District.
- Get people off the dole with work schemes. No work, no dole.
- Improve safety and reverse negative image. Encourage light industry investment. Have incentives eg, rates discounts. Champion Waiariki Institute as a premier learning institution, ie, build on its already established reputation.
- Improve the standard of the high schools. A positive service attitude from those in council offices. Clean up the lakes. Improve the health care facilities.

Respondents were asked what industries they usually work in.

Table 88: Industry

	Number	Percent
Agriculture/Horticulture	0	0.0%
Fishing/Forestry/Logging	2	13.3%
Mining/Quarrying	0	0.0%
Manufacturing	1	6.7%
Electricity/Gas/Water Supply	0	0.0%
Communication services	0	0.0%
Business services	3	20.0%
Construction	1	6.7%
Wholesale trade	2	13.3%
Retail trade	1	6.7%
Tourism/Hospitality/Accommodation	1	6.7%
Government agency	3	20.0%
Education	0	0.0%
Other	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

The four largest respondent groups were business services, government agencies, wholesale trade and fishing/forestry/logging.

Respondents to the survey were 53.3% female and 33.3% male.

Table 89: Gender

	Number	Percent
Male	5	33.3%
Female	8	53.3%
Not specified	2	13.3%
Total	15	100.0%

The largest respondent group by age was 40-49 year olds (40%).

Table 90: Age

	Number	Percent
16-20	0	0.0%
21-29	0	0.0%
30-39	3	20.0%
40-49	6	40.0%
50-59	2	13.3%
60-69	3	20.0%
70+	0	0.0%
Refused	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

Over 90% of the respondents businesses to this survey were in Wellington.

Table 91: Place of business

	Number	Percent
Auckland/Northland	0	0.0%
Canterbury	0	0.0%
Otago	0	0.0%
Wellington	14	93.3%
Waikato/Bay of Plenty	0	0.0%
West Coast	0	0.0%
Hawke's Bay/Gisborne	0	0.0%
Marlborough/Nelson/Tasman	0	0.0%
Taranaki /Manawatu/Wanganui	0	0.0%
Southland	0	0.0%
Overseas	0	0.0%
Other	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

There was a mixture of time frames that respondents businesses had been operating.

Table 92: Length of time businesses had been operating

	Number	Percent
Less than 1 year	1	6.7%
1-3 years	3	20.0%
4-5 years	1	6.7%
6-10 years	4	26.7%
11-15 years	1	6.7%
16-19 years	0	0.0%
20 years +	4	26.7%
Refused	0	0.0%
Not specified	1	6.7%
Total	15	100.0%

12.1 Key points from the online survey – invest, set up and do business:

- The most popular choices that came to mind about Rotorua from the majority of online business respondents were:
 - Shopping/business/industry
 - Central location
 - Lakes/nature/scenery
- The majority of online business respondents rated the Tourism industry and business support as good or excellent. They rated the weather/climate, business opportunities, cost of setting up business, the business environment and the economy as average as good.
- A total of 20% of businesses rated safety as poor in Rotorua and 26.7% rated legislation and compliance as poor.
- A total of 66.7% of businesses have an average or positive perception about investing in Rotorua.
- A total of 66.6% of business respondents were positive or extremely positive about lifestyle, access to amenities and access to the outdoor environment.
- The majority of online businesses rated housing and education either average or positive.
- Online businesses chose a DVD/Video, personal contact with current Rotorua investors and a website as their most popular options to assist them with investing or setting up a business.
- Online business respondents chose wage rates, transport links to the city and roading as average or positive.
- While 53.3% of business respondents had an average perception of career progression, 20% had a negative perception.

13.0 COMPARISON BETWEEN THE 1996 PERCEPTION SURVEY AND THE 2006 PERCEPTION SURVEY

- **Outdoor recreational opportunities** - The perception of Rotorua offering good outdoor recreational opportunities still remains the same from the 1996 perception survey, however there are more factors to this strength evident from the 2006 perception survey. For example, the outdoor environment is seen as being part of providing a good work/life balance when living in Rotorua and questions of lifestyle in Rotorua received positive or extremely positive comments.
- **Geographical location** - Geographical location remains a real strength for Rotorua and this comes through as one of Rotorua's competitive advantages in the 2006 perception survey. Saving time travelling in and around Rotorua and Rotorua's location in relation to other cities is seen as a real strength. The New Zealand public, businesses, youth and visitors all rated the geographic location of Rotorua well as both a place to live, work and learn and as a positive factor for setting up and doing business.
- **The media** - The opportunity suggested in the 1996 perception survey report to work with the media to improve Rotorua's image does not appear to have been taken up. The 2006 perception survey indicated that there was still concern that the media was profiling Rotorua in a negative way.
- **Career opportunities** - The 1996 perception survey proposed good career prospects in tourism and forestry but limited career opportunities for other industries. This perception still exists in the 2006 survey which rated overall career prospects in Rotorua as limited. There were also some perceptions that the workforce is transient, unstable and unskilled. Over one quarter of the New Zealand public respondents to the survey rated career progression in Rotorua negatively and most businesses rated career progression as average or negatively. Apart from visitors and youth most survey groups had a number of respondents who rated employment opportunities negatively.
- **Tourism** - The 1996 perception survey has Rotorua perceived as a tourist town however the 2006 perception survey shows that tourism is now seen as a successful 'industry' that is part of what Rotorua is, rather than being the only thing that Rotorua is known for. Impressions that came to mind about Rotorua included being a place that provided attractions and things to do, geothermal activity, lakes/nature/scenery, the great outdoors and a central location. Rotorua as a tourist destination was not chosen in the three most popular perceptions that came to mind in any part of the survey except by youth and those living in the region that chose it as their third most popular option.
- **Business support** - A strength that has appeared in the 2006 survey but not in the 1996 survey is the strong business support that Rotorua now has. There is a strong business network and supportive Council and Chamber of Commerce.
- **Education** - Perceptions of education in the 1996 survey are still much the same in the 2006 survey with negative perceptions of tertiary education and some perceptions that schooling is not up to the same levels as other centres. There were some negative perceptions about the quality of primary and secondary education as well as early childhood education which was not rated negatively in the 1996 survey. Youth were the only group who rated education very positively with 68.5% rating it as good or excellent. Youth were also very positive in their ratings of early childhood, primary and secondary education but rated tertiary education in the area as only average.

- **Roading** – The perception that the roading system was a weakness in the 1996 survey showed improvement in the 2006 survey with some respondents rating roading positively or average. Less than half of the respondents questioned on roading rated it negatively.
- **Airport** – The airport was seen as a major advantage to Rotorua in the 2006 survey where a lack of an international airport was seen as a weakness in the 1996 survey.
- **Wage rates** – Wage rates are still perceived as only average in the 2006 survey and low wages in comparison with other cities were considered a weakness in the 1996 survey. However, some businesses perceived wage rates as positive in the 2006 survey. Nearly half of youth respondents perceived wage rates as average and 11.1% perceived wage rates as negative.
- **Unemployment** - High unemployment was seen as a weakness in the 1996 survey but did not feature as an issue in the 2006 survey.
- **Crime and safety** – Crime rates were seen as a weakness in the 1996 survey and crime was suggested as an area for improvement in the 2006 survey. There were a number of respondents who still rated safety in Rotorua poorly and the general public and businesses had a negative perception about crime in Rotorua. Over one quarter of youth respondents rated safety in Rotorua as poor.

CONCLUSION

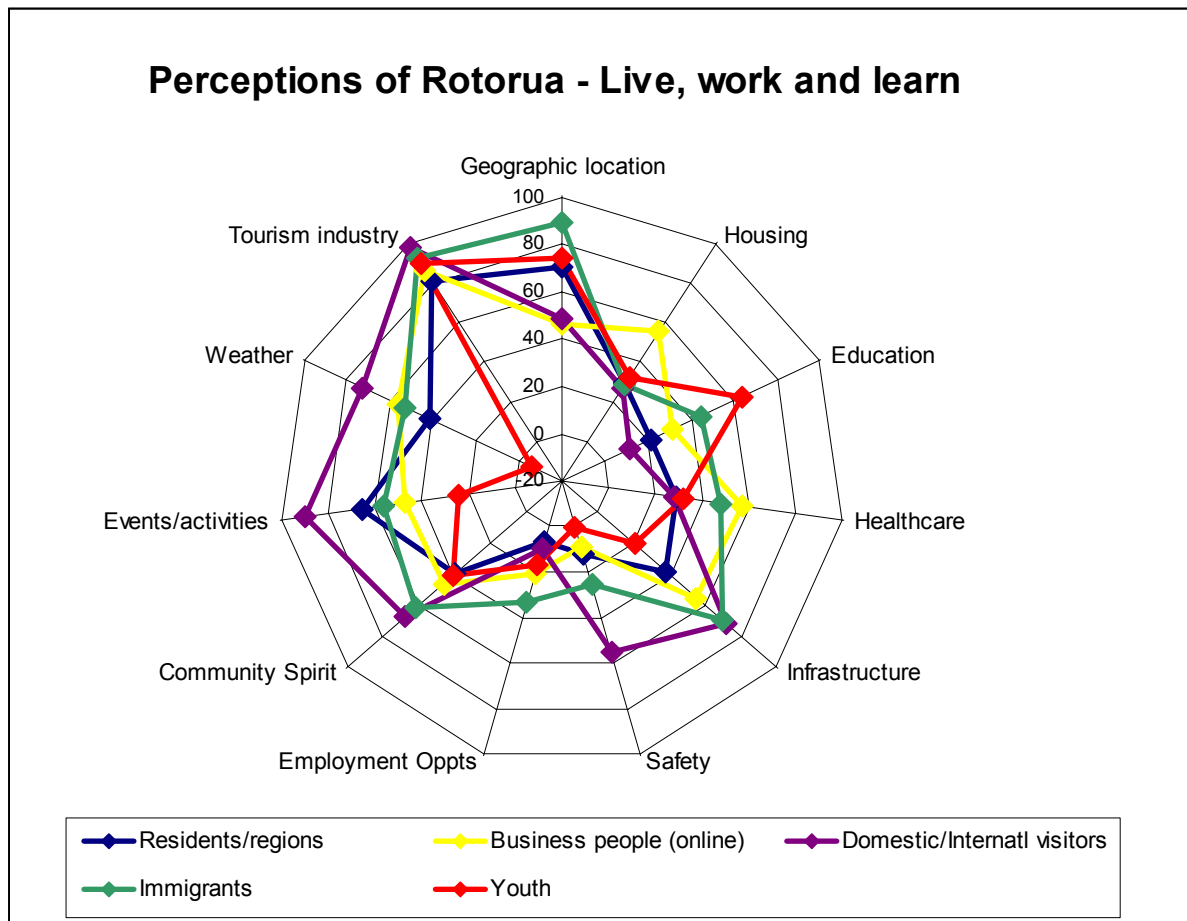
Themes from the Perception Survey - Rotorua 2006

- 1. Geographic location** - A majority of survey respondents to both the live, work and learn surveys, and the invest, set up and do business surveys rated the geographic location of Rotorua well. The Bright Economy Forum group also revealed a positive perception of Rotorua as a good central location.
- 2. Tourism industry** - A majority of survey respondents to both the live, work and learn surveys and the invest, set up and do business surveys rated the tourism industry in Rotorua as excellent or very good. However, there was some evidence from the literature review that Maori based tourism in Rotorua somewhat fails the domestic market, particularly Auckland visitors, who travel to Rotorua for a short break by focussing on the Maori 'traditional authenticities' aimed at the overseas market.
- 3. Career progression** - There was evidence of some negative perceptions about career progression from the live, work and learn surveys, some business respondents and from the results of the Bright Economy Forum. Nearly 60% of youth respondents thought career progression was only average.
- 4. Crime and safety** - There was a negative perception about crime from some of the Bright Economy Forum group, general public and businesses. However a majority of visitors to Rotorua who responded to the survey rated safety positively.
- 5. Education** - There were perceptions that schooling is not up to the same levels as other centres from the Bright Economy Forum as well as a desire for Rotorua to offer a high quality education system. Although the general public did not know much about the quality of education in Rotorua they did have some negative perceptions about tertiary education in the area. Within the district and surrounding areas there were some negative perceptions about the quality of early childhood, primary and secondary education and a desire to have the quality improved. However, the majority of youth rated primary, secondary and early childhood education well.
- 6. Setting up businesses** - A total of 43.4% of businesses surveyed by telephone had a positive or extremely positive perception about setting up business in Rotorua. A total of 34% of businesses rated setting up and doing business in Rotorua as average. The majority of businesses who answered the online survey had an average or positive perception about setting up businesses in Rotorua, however the net perceptions for setting up businesses in Rotorua could be improved. There were some perceptions from the Bright Economy Forum that there is a lack of high quality business space in Rotorua however commercial land and office space in Rotorua was perceived to be cheaper per square metre than in many other cities.
- 7. Building relationships** - To overcome business investment and staff recruitment issues attendees at the Bright Economy Forum suggested improvements in personal connections, word of mouth referrals and collaboration between businesses. A total of 34% of business respondents to the telephone survey chose personal contact with an economic development unit as helpful to them in making decisions to invest in Rotorua and 32.1% chose personal contact with current Rotorua investors as helpful.
- 8. Media** - There were negative perceptions about how Rotorua is portrayed by the media and how this may affect potential investors.

9. **Marketing tools** – The Bright Economy Growth Forum participants chose word of mouth referrals/testimonials (personal connections), billboards – visual packages and business links to the website (www.rotorua.com-living) as the three suggestions for marketing tools to overcome business investment and staff recruitment issues.
10. **Housing** – Nearly 20% of immigrants rated housing as poor with a similar percentage rating housing quality as poor. The majority of most other respondent groups gave housing an average rating. Only a majority of business respondents gave a positive rating to housing and nearly half of the domestic and international visitor respondents did not know about housing in Rotorua.
11. **Immigrants** – A high 61.1% of immigrants surveyed settled in Rotorua because of a job offer.
12. **Employment opportunities** – using the net positive response analysis, employment opportunities did not rate well with any respondent group and this indicated an area where significant improvement could be made.

Net response ratings by target groups

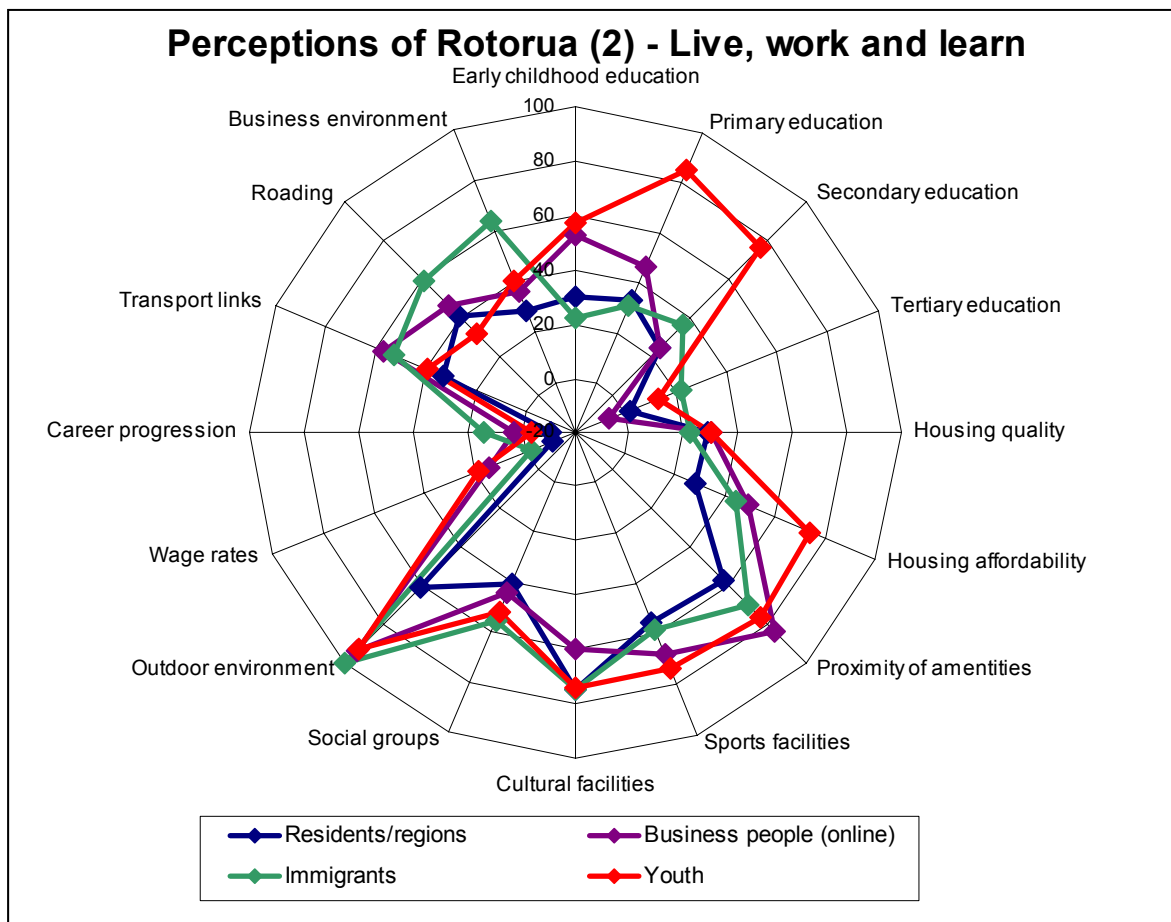
This comparison reviews the various perceptions of Rotorua that were measured in the surveys by way of a net positive response. The responses available to the respondents were on a scale of excellent, good, average, poor and very poor for each variable. To calculate the net positive response the numbers of respondents who chose excellent and good were added together and then their responses of poor and very poor were deducted for each question. Those who chose average, don't know or did not specify, were not part of the calculation.



This graph of the net positive responses illustrates clearly the positive perceptions from all groups of the tourism industry in Rotorua. All positive net responses to this aspect of Rotorua were over 80%. The graph also indicates the favourable perceptions of Rotorua as a geographical location from all respondent groups. Conversely the graph illustrates that most respondents groups did not rate safety in Rotorua well with youth giving safety a particularly low rating. The only group that gave a net positive rating over 50% were domestic and international visitors to Rotorua.

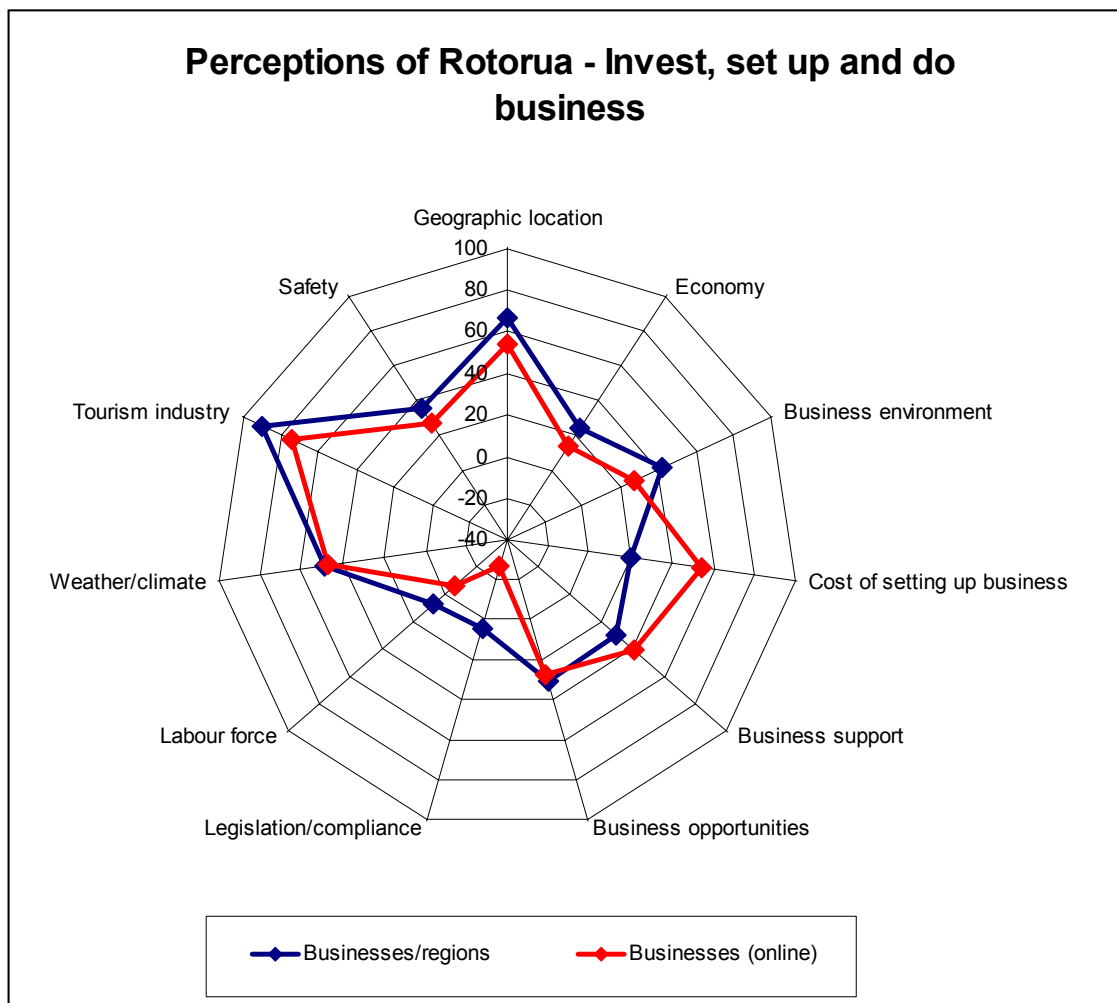
There were a range of perceptions of the weather with domestic and international visitors giving this aspect the highest net positive response and youth giving the weather a net negative response. Youth had the highest net positive perception of education in Rotorua but all other respondent groups had a less than 50% net positive response to education. Only business people rated housing with a net positive rating over 50%.

Net positive ratings for employment opportunities in Rotorua by all groups were less than 40%.

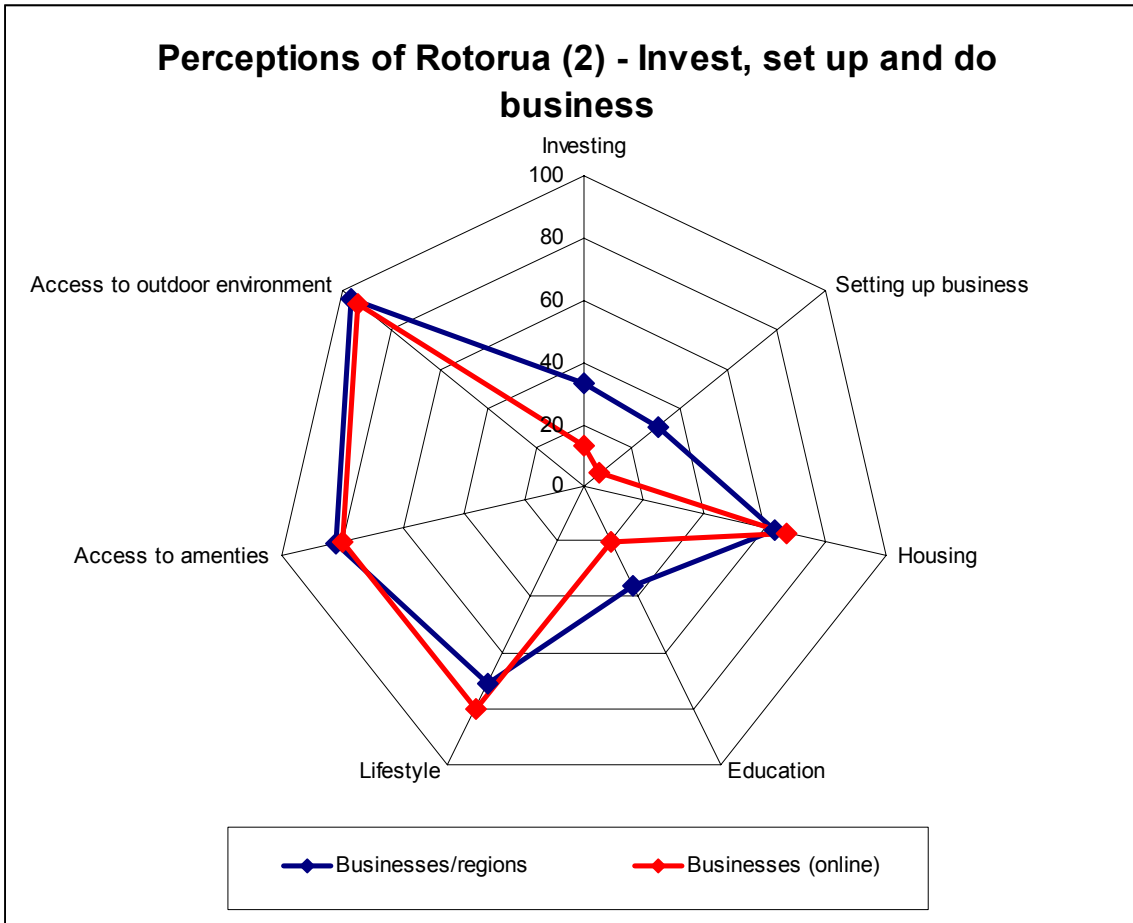


When the survey results are analysed by way of net positive perceptions, career progression and wage rates receive particularly poor ratings by all residents in the regions, business people, immigrants, and youth. Tertiary education also received poor ratings by all groups and primary and secondary education received high positive net ratings only by youth. Housing quality did not receive high net positive ratings by any group but housing affordability had mixed ratings with youth rating this aspect of housing positively well.

All groups had a positive net rating of 60% or over for the outdoor environment in Rotorua with youth and immigrants giving this aspect of Rotorua a net positive rating of over 80%. Cultural facilities, sports facilities and proximity to amenities all had good net positive responses. Only immigrants rated the business environment with a net positive rating over 60%. All other groups gave the business environment a net positive rating of 40% or less.



The invest, set up and do business surveys focussed more on the business aspects of Rotorua while incorporating some of the general aspects such as safety and weather. The responses to these surveys clearly indicated negative perceptions to legislation and compliance and to the labour force. Once again the perceptions of the tourism industry and the geographical location received the best net positive ratings. Respondents from both groups had more negative perceptions than positive perceptions about safety and the economy in Rotorua.



The invest, set up and do business surveys also revealed a high net positive response to access to the outdoor environment, the access to amenities and the lifestyle in Rotorua. Education, setting up business and investing in Rotorua received low net ratings and housing received a net positive rating around 60%.

SUMMARY OF KEY AREAS

Well Rated	Needs Improvement
<ul style="list-style-type: none"> ◆ Geographic location ◆ Tourism industry ◆ Outdoor environment/access ◆ Access to amenities ◆ Proximity to amenities ◆ Lifestyle ◆ Community spirit ◆ Good work/life balance ◆ Cultural facilities ◆ Sports facilities ◆ Events/activities ◆ Affordable land 	<ul style="list-style-type: none"> ◆ Wage rates ◆ Career progression ◆ Crime and safety ◆ Employment opportunities ◆ Education (particularly tertiary) ◆ Media image ◆ Housing quality ◆ Business environment ◆ Labour force ◆ Legislation and compliance for businesses ◆ Investing and costs of setting up business ◆ Personal contacts/relationships between businesses, EDU and investors. ◆ Domestic visitor market/Rotorua as a short break destination town ◆ Information technology infrastructure ◆ Branding 'feel the spirit'.

APPENDIX ONE: SURVEY FORMS

ROTORUA PERCEPTION SURVEY 2006

(To live, work & learn)

Hello/Kia Ora, this is _____ from APR Consultants. We are currently surveying people about their perceptions of Rotorua.

(Is it possible to speak to someone in your household who is aged over 16 years?)

Can you spare about 10 to 15 minutes of your time to answer some questions? All responses will remain completely confidential and will be grouped with others.

If it is not convenient to talk now, when would it be convenient to call you back? (Record their details on phone number sheet).

Information to give respondent if needed:

- All information you give is confidential within the provisions of the Privacy Act and the Market Research Society Code of Ethics.
- Your responses will be grouped with others before being released (RDC will not have access to individual responses).
- Your responses will be used only for the purposes of this research.
- You are welcome to ring my supervisor Sarah Kora at APR Consultants during working hours on 0800 277 937. She will be happy to confirm the purpose of the research and discuss any other matters further with you.

1. When thinking about Rotorua, what are the first three things that come to mind?

- a) _____
 b) _____
 c) _____

2. When thinking about Rotorua as a place to live, work and learn on a scale of 1-5 (where 5 = excellent, 4 = good, 3 = average, 2 = poor, 1 = very poor), how do you feel about...?

		5. Excellent	4. Good	3. Average	2. Poor	1. Very Poor	Don't Know
O1	Geographic location (proximity to other places).						
O2	Housing.						
O3	Education.						
O4	Healthcare (eg, hospitals, health care centres).						
O5	Infrastructure (ie, roads, technology, airport etc).						
O6	Safety.						
O7	Employment opportunities.						
O8	Community spirit.						
O9	Events / activities / entertainment.						
O10	Weather/climate.						
O11	Tourism industry.						
O12	Other (please specify)						
O13	Other (please specify)						

Please specify any comments:

.....

.....

.....

.....

3. What perceptions do you have about the following types of education in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative). (Please tick one rating for each education type).

Learning in Rotorua	Ex. Positive	Positive	Average	Negative	Ex. Negative
Quality of <u>early childhood</u> education (0-5 yrs)					
Quality of <u>primary</u> education (5-12 yrs)					
Quality of <u>secondary</u> education (13-18 yrs)					
Quality of <u>tertiary</u> education (ie, polytechnic)					

4. What perceptions do you have about housing in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative). (Please tick one rating for each category).

Housing in Rotorua	Ex. Positive	Positive	Average	Negative	Ex. Negative
Quality					
Affordability					
Proximity to amenities					

5. What perceptions do you have about living in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative). (Please tick one rating for each category).

Living in Rotorua	Ex. Positive	Positive	Average	Negative	Ex. Negative
Sports facilities					
Cultural facilities					
Social groups					
Outdoors environment / easy access to the outdoors					
Healthcare					
Safety					

6. What perceptions do you have about working in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative). (Please tick one rating for each category).

Working in Rotorua	Ex. Positive	Positive	Average	Negative	Ex. Negative
Wage rates					
Career progression					
Transport links to city (ie, road, air)					
Roading					
Business environment					

7. If you could undertake three things to improve Rotorua as a good place to live, work and learn; what would you do? (Please list ideas and reasons).

	Ideas	Reasons
1		
2		
3		

8. Please specify any further comments regarding Rotorua as a place to live, work and learn.

.....

.....

.....

.....

.....

Lastly, we have some questions to ensure we have a cross-section of respondents

9. What is your occupation?

- | | |
|--|--|
| <p>O1 Retired</p> <p>O2 Unemployed</p> <p>O3 Admin & clerical</p> <p>O4 Managerial worker</p> <p>O5 Professional & technical</p> | <p>O6 Student</p> <p>O7 Homemaker</p> <p>O8 Agriculture, forestry and fishing</p> <p>O9 Service worker</p> <p>O10 Other (please specify)</p> |
|--|--|

10. Gender (ask only if unsure)

- | | |
|---------|-----------|
| O1 Male | O2 Female |
|---------|-----------|

11. Please stop me when I reach your age group *(please tick ONE only)*

- | | |
|--------------------------------|---|
| <input type="radio"/> O1 16-20 | <input type="radio"/> O5 50-59 |
| <input type="radio"/> O2 21-29 | <input type="radio"/> O6 60-69 |
| <input type="radio"/> O3 30-39 | <input type="radio"/> O7 70+ |
| <input type="radio"/> O4 40-49 | <input type="radio"/> O8 Refused <i>(do not read out)</i> |

12. Where do you normally live? *(Please tick ONE only)*

- | | |
|--|--|
| <input type="radio"/> O1 Auckland/Northland | <input type="radio"/> O7 Hawke's Bay/Gisborne |
| <input type="radio"/> O2 Canterbury | <input type="radio"/> O8 Marlborough/Nelson/Tasman |
| <input type="radio"/> O3 Otago | <input type="radio"/> O9 Taranaki/Manawatu/Wanganui |
| <input type="radio"/> O4 Wellington | <input type="radio"/> O10 Southland |
| <input type="radio"/> O5 Waikato/Bay of Plenty | <input type="radio"/> O11 Overseas <i>(please specify)</i> |
| <input type="radio"/> O6 West Coast | <input type="radio"/> O12 Other <i>(please specify)</i> |

13. How long have you lived in your area?

- | | |
|---|---|
| <input type="radio"/> O1 Less than 1 year | <input type="radio"/> O5 16-25 years |
| <input type="radio"/> O2 1-5 years | <input type="radio"/> O6 26-50 years |
| <input type="radio"/> O3 6-10 years | <input type="radio"/> O7 50 years + |
| <input type="radio"/> O4 11-15 years | <input type="radio"/> O8 Refused <i>(do not read out)</i> |

14. Lastly, please tell me what is your ethnicity? *(please tick ONE only)*

- | | |
|---|---|
| <input type="radio"/> O1 NZ European/Pakeha | <input type="radio"/> O5 Asian |
| <input type="radio"/> O2 NZ Maori | <input type="radio"/> O6 Other |
| <input type="radio"/> O3 NZ Maori & Pakeha | <input type="radio"/> O7 Refused <i>(do not read out)</i> |
| <input type="radio"/> O4 Pacific Island | |

Thank you for taking the time to complete this survey, your input is very important!

ROTORUA PERCEPTION SURVEY 2006

(To invest & set up business)

Hello/Kia Ora, this is _____ from APR Consultants. We are currently surveying people about their perceptions of Rotorua.

(Is it possible to speak to someone in your household who is aged over 16 years?)

Can you spare about 10 to 15 minutes of your time to answer some questions? All responses will remain completely confidential and will be grouped with others.

If it is not convenient to talk now, when would it be convenient to call you back? (Record their details on phone number sheet).

Information to give respondent if needed:

- All information you give is confidential within the provisions of the Privacy Act and the Market Research Society Code of Ethics.
- Your responses will be grouped with others before being released (RDC will not have access to individual responses).
- Your responses will be used only for the purposes of this research.
- You are welcome to ring my supervisor Sarah Kora at APR Consultants during working hours on 0800 277 937. She will be happy to confirm the purpose of the research and discuss any other matters further with you.

1. When thinking about Rotorua, what are the first three things that come to mind?

- a) _____
- b) _____
- c) _____

2. When thinking about Rotorua as a place to set up business and/or invest on a scale of 1-5 (5 = excellent, 4 = good, 3 = average, 2 = poor, 1 = very poor), how do you feel about....? (please tick one rating only per category).

		5. Excellent	4. Good	3. Average	2. Poor	1. Very Poor	Don't Know
O1	Geographic location (proximity to other places ie, domestic markets).						
O2	Economy.						
O3	Business environment.						
O4	Cost of setting up business / investing.						
O5	Business support (ie, Chamber of Commerce, Rotorua District Council).						
O6	Business opportunities.						
O7	Legislation/compliance (ie, is RDC business friendly?)						
O8	Labour force.						
O9	Weather/climate.						
O10	Tourism industry.						
O11	Safety.						
O12	Employment opportunities.						
O13	Infrastructure (ie, roads,						

	technology, airport etc).						
○14	Other (please specify)						
○15	Other (please specify)						

2a. Please specify any comments:

.....

3. What perceptions do you have about investing in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative). (Please tick ONE rating only).

1. Ex. Positive	2. Positive	3. Average	4. Negative	5. Ex. Negative	6. No perceptions (do not read out)	Please outline any reasons

4. What perceptions do you have about setting up business in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative). (Please tick ONE rating only).

1. Ex. Positive	2. Positive	3. Average	4. Negative	5. Ex. Negative	6. No perceptions (do not read out)	Please outline any reasons

5. What perceptions do you have about living in Rotorua? (ie, extremely positive, positive, average, negative or extremely negative (Please tick one rating for each category and state reasons if any)).

Living in Rotorua	1. Ex. Positive	2. Positive	3. Average	4. Negative	5. Ex. Negative	6. No perceptions (do not read out)	Reasons
Housing (affordability, quality)							
Education (quality)							
Lifestyle (social, cultural, sports)							
Access to amenities							
Access to outdoor environment							

6. If you could undertake three things to improve the Rotorua District as a good place to invest and set up business; what would you do? (Please list ideas and reasons).

	Ideas	Reasons
1		
2		
3		

7. What would assist you in making a decision to invest and/or set up business in Rotorua District? (Please tick all that apply).

- O1 Pamphlet/booklet/publication
- O2 DVD/video
- O3 Profiles of business successes
- O4 Website
- O5 Personal contact with economic development unit
- O6 Investors' 'tour' of Rotorua
- O7 Personal contact with current Rotorua investors
- O8 Other (please specify)

8. Are there any personal reasons for not considering Rotorua as a place to invest and do business?

- O1 Yes (please specify)
- O2 No (continue to Q9).

9. Please specify any further comments regarding the Rotorua District as a place to invest and set up business.

.....

.....

.....

.....

.....

.....

Lastly, we have some questions to ensure we have a cross-section of respondents

10. What industry do you usually work in? (tick up to three that apply)

- O1 Agriculture/Horticulture
- O2 Fishing/Forestry/Logging
- O3 Mining/Quarrying
- O4 Manufacturing
- O5 Electricity/Gas/Water Supply
- O6 Communication services
- O7 Business services
- O8 Construction
- O9 Wholesale trade
- O10 Retail trade
- O11 Tourism/Hospitality/Accommodation
- O12 Government agency
- O13 Education
- O14 Other (please specify)

11. Gender (ask only if unsure)

- O1 Male
- O2 Female

12. Please stop me when I reach your age group (please tick ONE only)

- O1 16-20
- O2 21-29
- O3 30-39
- O4 40-49
- O5 50-59
- O6 60-69
- O7 70+
- O8 Refused (*do not read out*)

13. Which of the following best describes where your business is located? (*Please tick all that apply*)

- O1 Auckland
- O2 Northland
- O3 Bay of Plenty
- O4 Rotorua
- O5 Canterbury
- O6 Otago
- O7 Nelson
- O8 Wellington
- O9 Waikato
- O10 West Coast
- O11 Hawke's Bay
- O12 Manawatu
- O13 Wanganui
- O14 Gisborne
- O15 Marlborough
- O16 Taranaki
- O17 Tasman
- O18 Southland
- O19 Overseas (*please specify*)
- O20 Other (*please specify*)

14. How long has your business been operating?

- O1 Less than 1 year
- O2 1-3 years
- O3 4-5 years
- O4 6-10 years
- O5 11-15 years
- O6 16-19 years
- O7 20 years +
- O8 Refused (*do not read out*)

Thank you for taking the time to complete this survey, your input is very important!