



Whale Song sculpture project

Market Assessment

December 2017



CONTENTS



Section	Page
Background	3
Whale Song proposal	4
Other sculpture attractions	5
Sculptures around the world	6
New Zealand sculptures	9
Kāpiti situation	10
Tourism trends – demand	11
Tourism trends – supply	13
Arts – demand & supply	16
Education – demand & supply	17
Kāpiti economy – demand	18
Kāpiti economy – supply	19
Stakeholders	20
Key Takeaways & Next steps	22

BACKGROUND



'Whale Song' is a public sculpture and community education project proposed for the Kāpiti Coast District. The sculpture is part of the 'Wellington Sculptural Highway' project, spanning Linden to Levin. Those involved in the project believe the proposed sculptural works (to be developed alongside new road infrastructure) will enhance Wellington's reputation as the 'Arts Capital of New Zealand' and add to the sense of place for locals and visitors to the region.

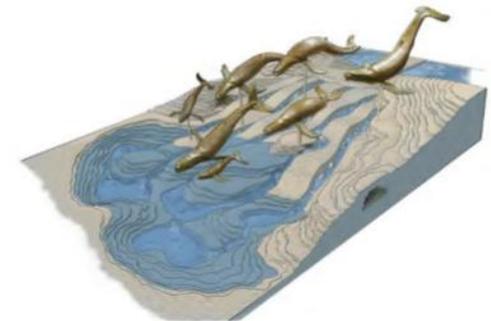
The Whale Song sculptural installation comprises a family of seven life-sized Humpback Whales swimming in pod formation, suspended on rods over the proposed one acre site. The sculpture is designed to be a reflection of Kāpiti's proximity to the coast, Kāpiti Island, early whaling and the surrounding marine environment. The whales would be cast from aluminium thermally coated in bronze. Each would be supported on a structurally engineered pole above the ground.

First mooted in 2010, the Whale Song Charitable Trust (WSCT) has recently been formed to drive this project forward. Land for the sculpture to be located on has been provided via Ngahina Developments (by way of a tenure in perpetuity agreement) and exploration of funding options for creating the sculpture has begun, including securing key sponsorships.

Angus & Associates was approached to help WSCT understand and quantify the benefits of the sculpture/education attraction for the Kāpiti Coast and wider Wellington region. The overall objective of the project is to determine what difference the sculpture will make if created on the proposed site, and to whom. This information can then be used to attract funders, to secure other support for the project, and to fine tune the offering where this might be needed.

The following document outlines research implemented to deliver the initial phase of this assessment.

Concept images:



WHALE SONG PROPOSAL



Imagine, you're standing on the seabed at 20 metres below the surface and looking up at a pod of Humpback Whales...

Whale Song comprises a sculpted family of seven 4 to 17 metre (life-sized) Humpback Whales swimming in pod formation, suspended on poles up to 18 metres above the ground in a simulated tidal landscape. Several of the whales would be equipped to periodically spout water from their blow holes and whale song may also be played from inside the structures. It will be one of New Zealand's largest sculptural installations, and it's thought that it will become a major Kāpiti attraction – drawing visitors to the area and providing a strong point of difference for the District's commercial area, as well as offering educational opportunities. Interpretive panels and a 'walk-in' whale (showing organs and bone structure) are also planned for the site.

Whale Song will be located on a one acre site, beside the Wharemauku Stream and adjoining a cycle/walkway in central Paraparaumu, 40 minutes north of Wellington. In future the site will integrate with an extension of Coastlands to the side of Rimu Road opposite the current shopping/commercial centre's location. The land has been gifted to WSCT by Ngahina Developments (as a perpetual lease). It is well suited to the sculpture because of its proximity to water, location adjoining a cycle/walkway network, and visibility from the Kāpiti Expressway (approximately 400 metres to the west).



Proposed Paraparaumu site

Mike Fuller, a local artist experienced in sculpting in bronze and aluminium would lead the design, construction and installation of the sculpture, involving a team of people to assist with the wide range of tasks involved in achieving this. In particular a foundry would be established (open to the public – a 'whale factory') to make fiberglass moulds, and cast and weld the whales (which would be made from recycled alloy thermally coated in bronze). Local school children would be involved in collecting recyclable aluminium cans for use in the sculpture, and Kāpiti youth in some aspects of the construction process.

The sculpture is expected to cost approximately \$5.3 million to construct and install – taking around two years to complete. It is not expected to draw on ratepayer funds, with a range of other sources of funding currently being explored. Letters of support have been received from a range of prominent stakeholders supporting the proposal.



Mike Fuller, Whale Song Artist/Sculptor

OTHER SCULPTURE ATTRACTIONS

This section considers how similar sculptures 'work' in other places in New Zealand and internationally (whilst acknowledging that Whale Song and the examples provided are all unique concepts, with characteristics that don't completely match).

This information provides a context within which to consider what the impact of Whale Song could be.



A walk in the park, Thanasis Germanos
(Anavros Park, Greece)

SCULPTURES AROUND THE WORLD



The Kelpies at Helix Park



Background: Unveiled in 2014, The Kelpies are two 30 metre high horse head sculptures created by Andy Scott; the largest equine statues in the world, and monuments to horse powered heritage across Scotland. Located beside the M9 and the Forth and Clyde Canal, 30kms north west of Edinburgh, The Kelpies are part of The Helix Park project which transformed 350 hectares of underused land.

Impact: When first unveiled, a boost in visitor numbers was expected due to what was being called the 'Kelpie effect'. The Kelpies received considerable media attention and it was hoped that 350,000 tourists would visit each year, bringing an estimated £1.5m of extra tourism revenue. Two months after The Kelpies opened to the public more than 15,000 visitors had already toured the sculptures and 150,000 visitors were estimated to have visited the site. One year after the sculptures opened to the public, The Kelpies were set to receive their millionth visitor and 50,000 visitors had taken a guided tour. In the same year they were named a 'national treasure' by the Scottish public, and the sculptures won a Scottish engineering award. In 2015 The Kelpies were named BBC Countryfile's Landmark of the Year.

Considerations: The Kelpies has been undeniably popular with visitors, however it's important to note that the sculptures are part of The Helix Park project and are not a stand alone attraction. The park is marketed as 'a place for everyone' and offers a wide range of activities (walking, running, cycling, water sports, a water play area and an adventure zone) and facilities (such as toilets, parking, picnic tables, and dog leash clips). The nearby presence of the Falkirk Wheel also needs to be taken into consideration in terms of impacting visitation, being a notable visitor attraction itself and only a short drive away. Visitation of the Falkirk Wheel increased by 18% in 2015 to 605,432 visitors (making it one of Scotland's top ten attractions that year). The attractions are often mentioned together when discussing tourism in Falkirk.

Mini-Kelpie sculptures have also been created to promote visitation to Helix Park. They have been taken to various locations around the UK and the world to encourage footfall and promote local businesses (in the locations they visit) as well as raise interest in visiting the actual sculptures in Scotland.

In 2016 Falkirk councillors demanded a review of the legal position of the agreement over the Kelpies copyright. The sculptor owns the intellectual property rights and angered some councillors when he refused to allow a scarf knitted by local residents be tied around The Kelpies. Other concerns have included the length of time it took to agree on and produce miniature souvenir Kelpies, and the threat of legal action over a burger bar based near the sculpture (as it 'defiled' the sculptor's vision). Councillors feel that as The Kelpies was paid for by a mixture of tax payer and lottery money, authorities running the attraction should have more say on how it is operated and marketed.

SCULPTURES AROUND THE WORLD



Background: Completed in 1998 and mostly funded by the National Lottery, Angel of the North is a 20 metre high sculpture near the A1 in Gateshead, England. Made from 200 tonnes of steel, it has a wingspan of 54 metres and dominates the skyline from its panoramic hilltop position.

Impact: The Angel of the North has become a major tourist attraction for the area and is estimated to be seen by 90,000 drivers per day, as well as by train passengers travelling from London to Edinburgh.

A report released in 2008 identified the Angel of the North as a key part of Gateshead's revival, attracting at the time 400,000 people every year. Referred to as the 'Angel effect', tourism in Newcastle and Gateshead steadily increased from 2003-2007, at a time when visitation to the UK had fallen. Improved parking and toilet facilities were added in 2008 which were hoped to boost the 'Angel effect'.

In 2017, The Angel of the North was named as one of the most photographed landmarks in the UK (based on the number of images posted on social media sites), coming in at number five outside of London. Visitation currently sits at approximately 150,000 per year.

Considerations: Opinion of the sculpture has been divided from inception with many art critics and residents not fond of the sculpture. In the early stages, a campaign was set up to oppose the sculpture which led to Antony Gormley (the sculptor) considering pulling out. He believes public opinion of the sculpture changed when Newcastle fans draped a huge replica shirt over the Angel in the lead up to the 1998 FA Cup Final.

The Angel of the North has found itself used opportunistically by unapproved groups. Supermarket chain Morrisons projected a baguette onto the Angel's wingspan leaving the artist unimpressed, and Brexit Leave campaigners projected messages over the wingspan prompting the artist's lawyers to write a warning letter to the campaigners.

The sculpture has also been the cite of pre-approved use, being the cite chosen for 2014's Poppy Appeal launch. Similar use has also been made of The Kelpies, being lit up in purple and blue to show support for families affected by Huntington's disease and in red in support of the Poppyscotland appeal.

Over time the sculpture has become part of the regional identity, 'welcoming' visitors to Gateshead. The local council even makes available a 'My Angel' teachers pack for visiting school groups, with lesson plans and activities.



Angel of the North

SCULPTURES AROUND THE WORLD



Bear at Dunbar



Developers plans for a 5 metre sculpture of a bear in East Lothian, Dunbar, Scotland were given the go ahead in late November 2017. Initially put on hold by the local council, citing concerns about road safety, the Andy Scott sculpture (the sculptor behind The Kelpies) is now likely to go ahead. It is hoped the sculpture will have a similar effect to The Kelpies, drawing visitors in to the region to view it.

Leopard at Marischal Square



This towering leopard sculpture is part of the £107 million Marischal Square development in Aberdeen, Scotland. Commissioned by the developers, it was hoped the sculpture would bring greater awareness of and visitation to the new hotel, shopping and office space development as well as boost the city's tourism economy. Soon after the sculpture was unveiled and opened to the public (in late October 2017), footfall was reported to have increased at Marischal Square.

Genghis Khan Equestrian Statue



Completed in 2008, this statue of Genghis Khan on horseback is 40 metres tall. It sits on the top of a visitor centre and museum, and is located an hours drive from Mongolia's capital city. Since completion of the statue, various developments have taken place around it, including 200 yurts (traditional Mongolian tents) for accommodation, a golf course, an open theatre and an artificial lake.

EastLink Sculpture Park



Located near Melbourne, four sculptures are located alongside the EastLink toll motorway and are designed to be viewed from a moving vehicle. A further eight sculptures can be viewed from the EastLink Trail (a cycle/walkway near to the motorway). Together these sculptures make Australia's largest sculpture park. The four main sculptures are passed by approximately 200,000 vehicles daily.

NEW ZEALAND SCULPTURES



Hundertwasser Toilets



Background: Completed in 1999, using recycled materials, Kawakawa's public toilets, designed by internationally renowned architect Friedensreich Hundertwasser are also considered an important work of art and Northland visitor attraction.

Impact: Visiting the toilets is the #1 thing to do in Kawakawa according to Trip Advisor, and the 30th most popular of almost 250 things listed to do in the Northland region. The toilets attract approximately 10,000 visitors per month to the rural Northland community.

Consideration: Spearheaded by the Kawakawa Hundertwasser Park Charitable Trust, plans are in place to build Te Hononga near to the toilets – a facility that will include a Hundertwasser interpretive centre, gallery, town square, links to the toilets, parking, walking and cycling links, and the Council library and service centre. The project is expected to improve traffic problems in the town and better cater for the growing number of visitors (forecast to rise up to 350,000 per annum).

Herd of Cows



Background: 45 life sized fiberglass cows, each painted by artists dot the main street of Morrinsville. The Herd of Cows are intended to attract visitors to the town and showcase its growing arts culture and dairy farming heritage.

Impact: The Herd of Cows were designed to give Morrinsville an 'identity' - something to highlight a town void of any significant natural attractions. When first unveiled, the local information centre began opening seven days a week to cater for visitors keen to pick up maps detailing where all the cows were placed.

Consideration: The 'herd of cows' attraction has its own website, facebook page, and 'enquiries' email address.

KĀPITI SITUATION

This section considers the current situation in Kāpiti from a tourism, arts, education and general economic perspective, to provide context to how Whale Song might fit into and be received by the District.

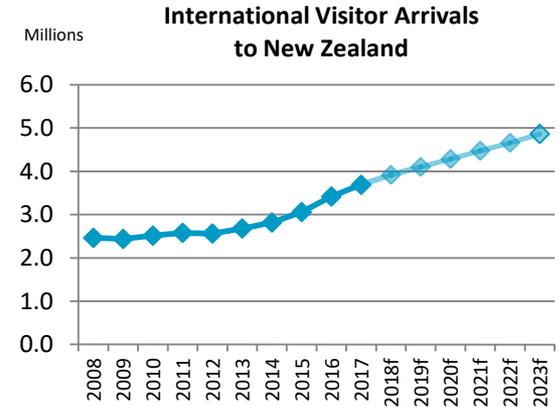


TOURISM TRENDS - DEMAND



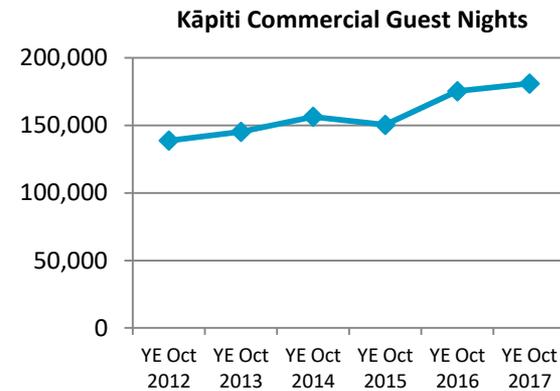
Visitor Numbers in New Zealand

- In the last 12 months almost 3.7 million international visitors came to New Zealand. The market grew by 8% on the previous year, an increase of 270,461 visitors.
- International visitor arrivals to New Zealand have been increasing at an average of almost 9% per annum in the last five years. Holiday arrivals are growing at a faster rate (11% in the year to March 2017).
- International visitor arrivals to New Zealand are forecast to grow by almost 5% per annum through to 2023, to reach an annual total of almost 4.9 million visitors. Much of this growth is expected to come from the Chinese, Australian, and US markets.
- The number of New Zealanders travelling domestically is not officially recorded but domestic visitors account for 57% of all commercial guest nights.



Visitor Numbers to Kāpiti Coast

- The number of *visitor nights* from all international origins in Kāpiti Coast, for the year to June 2017 is estimated at 139,256 (0.3% of all international visitor nights in New Zealand). The number of *visitors* is estimated at 33,320 (0.9% of all international visitors).
- Australian visitors account for 45% of the District's international visitor nights.
- Domestic visitor numbers are unknown, but domestic visitors account for 86% of the Kāpiti-Horowhenua region's commercial guest nights, so the proportion is likely to be similar for the Kāpiti District. In the year ending October 2017 Kāpiti recorded almost 181,000 commercial guest nights, up 3% on the year before (and 0.5% of the national total). In addition to this Kāpiti hosts visitors in non-commercial accommodation and via Airbnb, as well as day visitors.



Sources: Statistics New Zealand , International Visitor Arrivals to October 2017
 MBIE Tourism Forecasts 2018-2023
 MBIE International Visitor Survey (IVS) to June 2017
 Statistics New Zealand, Accommodation Survey: October 2017

TOURISM TRENDS - DEMAND



Visitor expenditure in New Zealand

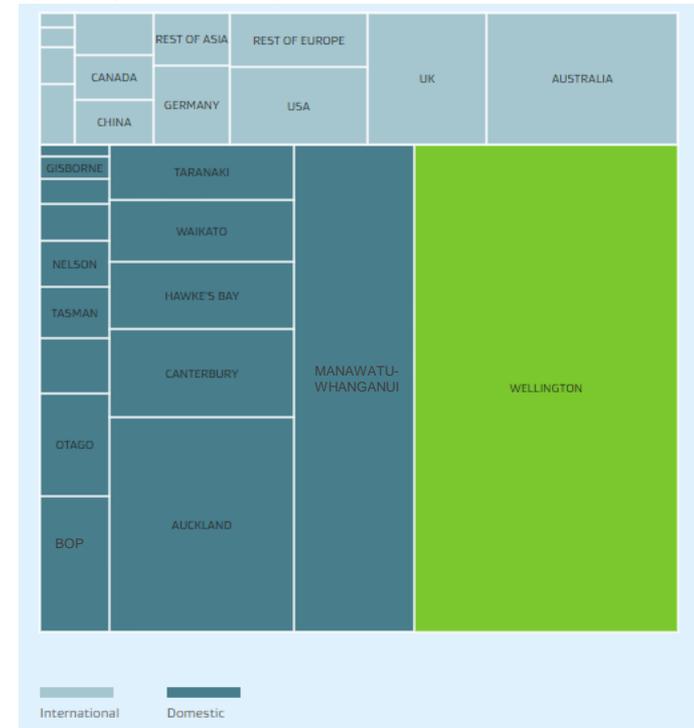
- Tourism contributes \$14.5 billion to New Zealand’s exports (almost 6% of GDP). It’s New Zealand’s biggest export industry accounting for 21% of total export earnings.
- Domestic visitors account for 60% of tourism expenditure in New Zealand, and international visitors 40%.



Visitor expenditure in Kāpiti Coast

- Total tourism expenditure in the District for the year ending October 2017 is \$172 million (made up of \$136 million from domestic tourism and \$36 million from international tourism) – 0.5% of the total for New Zealand. Twenty nine territorial authorities experienced higher tourism expenditure for the same period.
- Expenditure grew 5.3% from the previous year (4.4% in the domestic market and 9.3% in the international market).
- Almost 80% of tourism spend is from domestic visitors and just over 20% is from international visitors (the majority are English speaking – 70% of international visitor expenditure is from Australia, the UK and the USA).
- One third of Kāpiti’s tourism spend is from visitors from other parts of the Wellington region.

Spend by visitors in Kāpiti Coast



Sources: MBIE Regional Economic Activity Web Tool (Monthly Regional Tourism Estimates) and MRTE Insights Viewer
 Statistics New Zealand, Tourism Satellite Account, YE March 2017
 Marketview: Kāpiti District Council, Tourism Report, Dec 2017

TOURISM TRENDS - SUPPLY



New Zealand supply

- Tourism employs around 231,000 New Zealanders, or 8% of the workforce. The sector has generated around 21,000 new jobs in the year ended March 2017 (+9%).
- In November 2017 the New Zealand Tourism Sustainability Commitment was launched, with the vision of leading the world in sustainable tourism. Over 100 New Zealand tourism businesses are already signed up to the initiative that aims to ensure economic, environmental and social sustainability becomes a genuine ethical underpinning of New Zealand's tourism industry.
- Some New Zealand destinations are suffering from lack of appropriate tourism infrastructure to cope with the volume of visitors they are hosting (including accommodation, appropriate roading, human resources, and visitor facilities such as signage, toilets and rubbish bins). Various initiatives are being employed to mitigate this, and Tourism New Zealand are also employing a regional and seasonal dispersal strategy to try to spread visitors more evenly through new regions and through the year.
- No similar sculpture attractions by scale are known of in New Zealand.

Sources:
Statistics New Zealand, Tourism Satellite Account, YE Mar 2017
www.sustainabletourism.nz

TOURISM TRENDS - SUPPLY



“... we can see potential for a better visitor experience on the mainland side, and to sell the story of Kāpiti Island...”

Rob Stone, DOC Partnerships Manager

Kāpiti supply

- The Kāpiti Visitor Guide 2017 lists 68 accommodation options in the District (18 Motels, 2 Backpackers, 4 Holiday Parks, 20 Bed & Breakfasts, 10 Luxury options, 12 Holiday Homes, and 2 retreats). However, just 22 of these properties are of a scale to be included in Statistics New Zealand’s Accommodation Survey, and just 2 have a Qualmark Licence. Further, Infometrics’ analysis of Airbnb data shows that the number of Airbnb listings in Kāpiti rose from 185 in October 2016 to 375 in September 2017.
- A range of tourism experiences are available in Kāpiti, but few would be described as major or iconic visitor attractions, and few are commissionable products (i.e. products where tourism trade receive a commission if they sell the product to their clients, and so products that are generally more attractive for the tourism trade to promote). Attractions include Kāpiti Island, Southward Car Museum, Ngā Manu Nature Reserve, Ruth Pretty cooking school, Tuatara Brewery, Queen Elizabeth Park, Kāpiti 4x4 Adventures, Waikanae Estuary, and the District’s 40+ kilometres of coastline. Much of Kāpiti’s tourism offering is based around outdoor soft scenic recreation/coastal-type experiential attractions and activities.
- The District has recently formed an Events Strategy and some of the more prominent Kāpiti events are the Coastella International Music Festival, Kāpiti Food Fair, Ōtaki Kite Festival, Māoriland Film Festival, Kāpiti Coast International Jazz Festival, and the Kāpiti Arts Trail.
- Significant development of cycle/walkways has also occurred in recent years – some as part of the Kāpiti expressway construction, but also including projects like the Paekakariki Escarpment track (part of Te Araroa trail) and the Queen Elizabeth Park cycle trail (linking Paekakariki and Raumati).
- Other development relevant to tourism is the new Ramaroa heritage centre at Queen Elizabeth Park, and proposals for Ōtaki to be New Zealand’s first bilingual town and for a ‘Gateway Centre’ to be developed for Kāpiti Island.
- Kāpiti Island, perhaps the District’s most well known attraction, receives just under 10,000 visitors per annum. Capacity is up to 160 per day (or 58,000 per annum), but this is unlikely to be reached due to weather and tourism seasonality (although there is some scope for growth).
- There is currently no mainland ‘base’ for visitors interested in learning about, or going to, Kāpiti Island. Whale Song could drive more visitation by locals and visitors to the Island. Being a high value experience, and requiring a day trip, increasing visitation may also drive growth of overnight stays in the District. There is also nothing known of in the District that currently tells the story of the significance of whales to the area – despite them traversing the coastline and their prominence in the District’s history.

Sources: <http://www.scoop.co.nz/stories/AK1708/S00802/clarification-around-the-future-of-kapiti-island.htm>
<https://www.qualmark.co.nz/en/find-qualmark-businesses/>
Kāpiti Coast Economic Update, Dec 17
<http://tourismticker.com/2017/12/04/ramaroa-opening-adds-new-dimension-to-queen-elizabeth-park/>

TOURISM TRENDS - SUPPLY



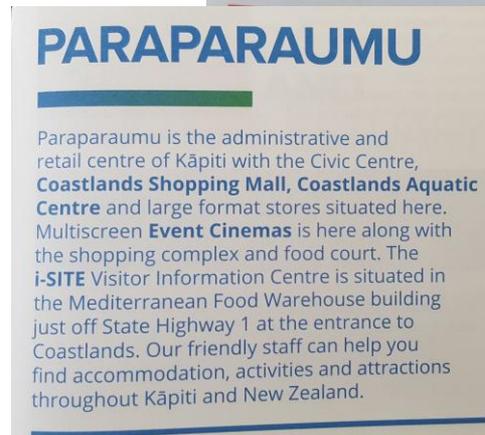
The images below illustrate how Kāpiti and Paraparaumu are currently marketed and portrayed to visitors – Whale Song would add something quite unique to the offering, and especially add significantly to the type of attractions available in Paraparaumu.



Wellington The Official Visitor Guide 2017



Kāpiti Visitor Guide 2017



ARTS – DEMAND & SUPPLY



Kāpiti has a large and diverse arts and culture scene, with a number of galleries and many creative and talented residents.

The Kāpiti Coast District Council has a strategy for supporting the arts, consisting of five focus areas: access to the arts for all, fostering indigenous Māori arts and culture, the arts and identity, community leadership in the arts, and the arts and economic development.

One particular initiative of the Council is the annual Kāpiti Arts Trail – an ‘open studio’ held over two weekends during late October/early November. The trail involves around 100 artists, with attendees touring the District as they move between artists’ studios. The event has been running for 17 years and has a sizeable following (1100 people follow the event facebook page, for example).

Another recent Council initiative was commissioning local artist Theo Arraj to revamp a wall in a shopping stretch by creating a spray painted mural called Metamorphic, ‘to draw life to the area’. The concept was selected by the Council’s Public Art Panel.

The Kāpiti Performing Arts Centre is another local project currently underway. The \$10 million, 2000 square metre building with 330 seat auditorium will be constructed in early 2018 at Kāpiti College. The facility will be used by the college as well as the local community.

A landscape art installation ‘Te Huarahi Raupo’ is also currently being built on Kāpiti Coast Airport land. The publicly accessible area acknowledges the land’s original owners and offers a reflective space for the community. It is expected to be completed in early 2018.

The recently completed Kāpiti Expressway also includes artistic and sculptural elements.

Together these few examples of arts activity suggest a vibrant local arts environment. Whale Song would be something very unique to add to this base.



Sources: <http://www.scoop.co.nz/stories/CU1711/S00107/kapiti-coast-arts-trail-showcases-diversity-of-talent.htm>
http://www2.nzherald.co.nz/kapiti-news/news/article.cfm?c_id=1503789&objectid=11937427
http://www.kapiticoast.govt.nz/contentassets/9d9da2d020904496aa7324a6a9d48f35/strategy_for_supporting_the_arts.pdf
<https://www.stuff.co.nz/dominion-post/culture/98757701/finish-in-sight-for-longtimecoming-airport-landscape-art-installation>
http://www2.nzherald.co.nz/kapiti-news/news/article.cfm?c_id=1503789&objectid=11675175

EDUCATION – DEMAND & SUPPLY



The Whale Song sculpture will offer significant educational opportunities both during its construction and once it's installed. While all visitors to the 'whale factory' and final site will experience the educational aspect of the sculpture's construction and presence, it offers a particular opportunity for educational groups to visit and learn about various aspects of the Whale Song story – including conservation, construction techniques, history, art, design, zoology, tourism, and geography (much of which could be linked to the New Zealand Curriculum).

The Ministry of Education encourages education outside the classroom (EOTC) – which may involve visits to attractions, camps, sports trips/activities and takes place anywhere from the school field to another country - it is a part of schooling in New Zealand and a key component of primary and secondary school experiences.

Whale Song is also likely to align with the nationwide Enviroschools programme that the Kāpiti Coast District Council supports and many Kāpiti schools are members of. The Enviroschools programme supports children to 'plan, design and implement sustainability actions that are important to them and their communities'.

There are 15 primary schools, 3 secondary schools, and 2 Kura Kaupapa Māori in Kāpiti, together educating approximately 8,450 students (5,000 at primary level and 3,450 at secondary level), and anecdotally school rolls in Paraparaumu and Waikanae are growing. It's likely Whale Song will also be close enough to some areas surrounding Kāpiti to enable a trip, as well as be sought out by travelling educational groups, tertiary education groups, and some early childhood educators. It will perhaps be particularly attractive to such groups because it will be a free attraction with no admission fee (allowing trip costs to be kept down), however interest may be reliant on the site offering appropriate facilities (for example shelter, toilets, and interpretive material).

Comparable EOTC opportunities in the area might be considered to include beach clean ups, Kāpiti Island trips, Ngā Manu Nature Reserve, Mahara Gallery, bush walks, and the Waikanae Estuary Scientific Reserve.

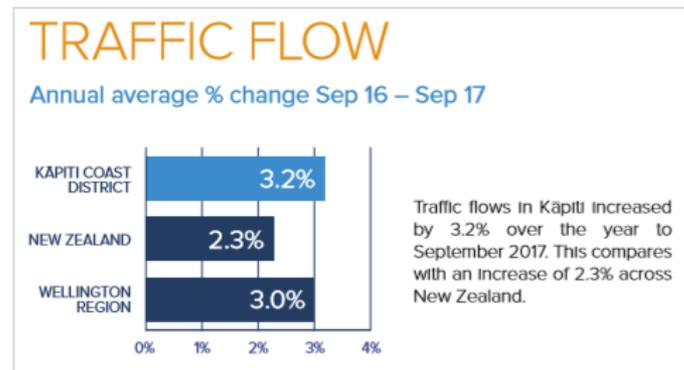
Sources: Ministry of Education, EOTC Guidelines 2016 – Bringing the Curriculum Alive
https://en.wikipedia.org/wiki/List_of_schools_in_the_Wellington_Region#Kapiti_Coast_District
www.enviroschools.org.nz
<http://www.stuff.co.nz/national/education/85465246/kapiti-schools-struggling-to-cope-with-growth-in-student-number>

KĀPITI ECONOMY – DEMAND



Other economic factors relevant to the environment in which Whale Song will exist include:

- In the past 10 years economic growth in the Kāpiti Coast District has matched the average rate of growth in the national economy, although for the past three years it has outstripped it (for example it was 3.8% compared to 2.5% nationally in year to March 2016). The construction industry made the largest contribution to overall growth in Kāpiti between 2015 and 2016.
- Approximately 52,700 people currently live in the Kāpiti Coast district, and the District's population is expected to rise to more than 60,000 in the next 20 years. Over time population growth has sat below the national average, but recently has increased. Kāpiti's population is 'older' than the national average with just 56% of residents of working age, compared to 66% nationally (more than a quarter of residents are aged 65 or more).
- A recent Marketview report on the economic impact of the new Kāpiti Expressway on expenditure in the District's retail environment since it opened (a six month period) suggests spending has grown on the previous year by 8% - by 6% for locals (three quarters of the total), 12% for day trippers (9% of the total), and 18% for overnight visitors (16% of the total, although some of this will be attributable to road workers). Expenditure from passing trade has been most affected by the new road – with southbound passing trade declining 10% from the same period in the previous year. While local spending has increased, it should be noted that it has increased more on spending outside the district (+15%), suggesting the Expressway may be making it easier for residents to travel outside of the District to shop.
- In this environment Coastlands Shoppingtown is attracting over 3.5 million visitors per annum.
- Traffic flows in the District have increased in the past year, and at a rate higher than the national average, and the average for the Wellington region. Usage of SH1 in the area sits at approximately 20,000-25,000 vehicles per day.



Sources: Marketview: Kāpiti Coast District Council 1st Quarterly Update, Mackays to Peka Peka Expressway Analysis, September 2017
www.id.com.au (population forecasts)
Infometrics, Kāpiti Coast District Annual Economic Profile 2016
Kāpiti Coast Economic Update, December 2017
NZTA State Highway traffic volumes

Kāpiti Coast Economic Update, December 2017

KĀPITI ECONOMY – SUPPLY



“Even without the Peka Peka to Ōtaki section completed, Ōtaki is benefiting economically - ‘day tripper’ spending at the SH1 shopping area has grown by 99% in just six months. It’s easier for people to visit Ōtaki using the Expressway, avoiding the traditional traffic delays at Paraparaumu and Waikanae”

Kāpiti Coast Chamber of Commerce Chair, Heather Hutchings

Other economic factors relevant to the environment in which Whale Song will exist include:

- Total employment in the Kāpiti Coast District averaged 16,700 in the year to March 2016 – up 4% from a year earlier. Employment in New Zealand increased by 2.7% in the same period. The largest employing industries in Kāpiti are construction, retail trade, and health care and social assistance – together accounting for just over 40% of employment. The unemployment rate in the District is the same as the national average at 4.9% in 2017. One third of the working population work outside the District and the Kāpiti District Economic Development Strategy seeks to have more people working locally in higher skilled jobs rather than commuting out of the area for work.
- A significant change in the District’s roading infrastructure is occurring with the recent completion of the Mackays to Peka Peka Expressway, construction of the Peka Peka to Ōtaki Expressway and Transmission Gully underway, and planning for the Ōtaki to north of Levin section of the Wellington Northern Corridor progressing as well. Shared pathways for walking and cycling are being developed alongside these roads. The Metlink train service from Waikanae to Wellington has also been upgraded in recent years. Further, Kapiti enjoys an Air New Zealand service to Auckland as well as services by other airlines to Nelson and Blenheim. Ultimately all of this infrastructure makes the district easier to get around and visit, as well as realise its economic potential.
- Potential exists for major development of Kāpiti Airport land, now that planning restrictions have been lifted by the Kāpiti Coast District Council. The rule change allows houses, supermarkets, a department store, industrial units and multiple small food outlets to be built on the 85 hectares of land surrounding the airport (subject to provision of resource consent).
- In December 2017 the Kāpiti Coast District Council voted to allow Easter trading in Kāpiti – potentially a sign of a greater tourism focus by the Council. The Council has also recently created a Visitor Attraction Plan and worked with the Kāpiti Chamber of Commerce on the Kāpiti District Economic Development Strategy . The Chamber is also working with the Porirua Chamber of Commerce on a joint campaign to drive demand for the local Air New Zealand flights between Kāpiti Coast and Auckland.

Sources: Infometrics, Kāpiti Coast District Annual Economic Profile 2016

Kāpiti District Economic Development Strategy 2015-2018

Kāpiti Coast Economic Update, Dec 2017

<http://www.scoop.co.nz/stories/AK1711/S00811/expressway-completion-vital-for-wellington-region.htm> (Kāpiti Chamber of Commerce)

<https://www.stuff.co.nz/dominion-post/news/100016077/kpiti-expressway-shared-pathway-still-alive-as-preferred-route-option-is-decided>

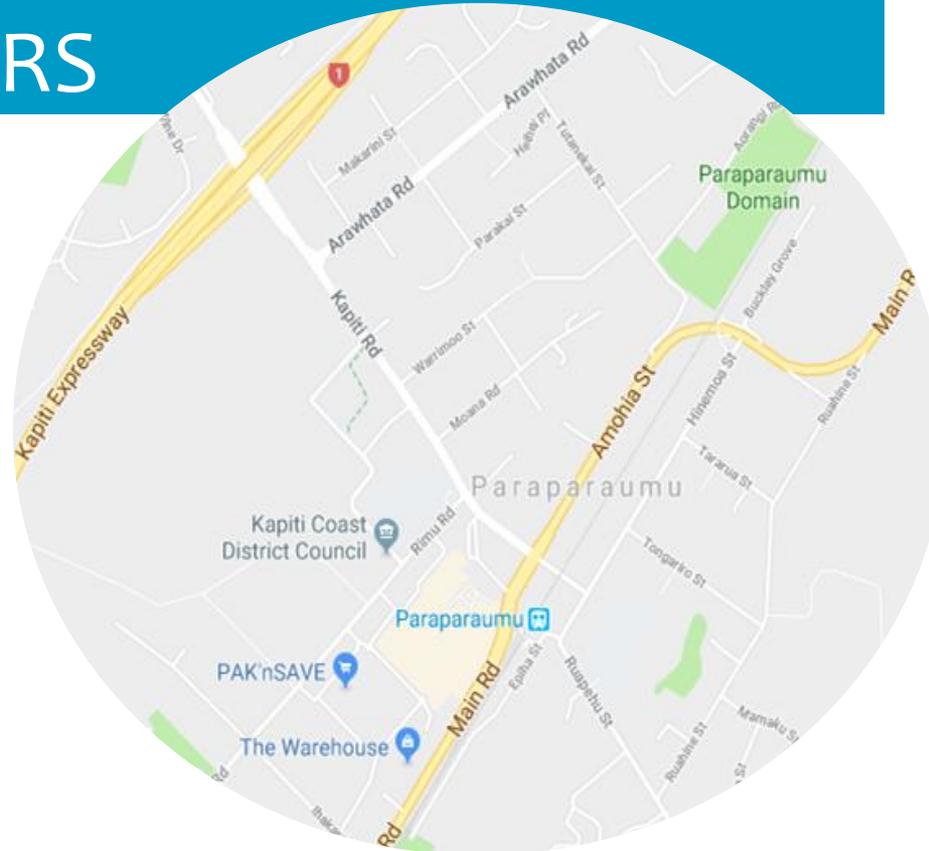
<http://www.scoop.co.nz/stories/AK1711/S00811/expressway-completion-vital-for-wellington-region.htm>

<https://www.stuff.co.nz/business/property/98512674/chocks-away-major-development-on-cards-at-kpiti-airport-as-planning-restrictions-lifted>

<https://www.stuff.co.nz/business/99728418/kpiti-retailers-not-rushing-to-open-on-easter-sunday-despite-getting-permission>

<http://tourismticker.com/2017/09/29/chambers-to-promote-local-air-service-for-kapiti/>

STAKEHOLDERS



STAKEHOLDERS



Through this Discovery Phase, stakeholders potentially relevant to the Whale Song project have emerged. The table below outlines these potential stakeholder and outlines why. This is a preliminary outline, to be developed and discussed further with WSCT as the next stage of work is considered.

Stakeholder	Interest
Kāpiti Coast District Council	Relevant to multiple teams such as Building & Resource Consents, Economic Development, Arts, Leisure & Open Spaces
Ngahina Developments	Provider of land
Coastlands	Major retail centre located near to site
Kāpiti Chamber of Commerce	300+ members representing the local business community
Ngahina Trust	Long term stakeholders in the District with iwi connections and around 100 shareholders
Wellington Regional Economic Development Agency (WREDA) & KEDA	
Kāpiti Coast Airport	The airport's private owners have their own development plans
General public/ratepayers/residents	
Visitors – regional, national, international	
Tourism trade Other tourism businesses/interested parties	Businesses involved in the tourism industry in Kāpiti, trade supplying the local market, local tourism experts (e.g. tourism consultants & academics), i-SITE staff, Kāpiti Island operators
Manaaki Kāpiti	An organisation formed to promote, develop and coordinate the tourism, hospitality and retail sectors of the Kāpiti Coast, Manaaki Kāpiti was formed in 2013 with members from the Kāpiti Coast tourism, retail and hospitality sectors (still exists?)
Education sector	Interest in and requirements for school trips and other educational opportunities
Kāpiti Arts community	
Iwi	
Department of Conservation	Re presence at the attraction, Kāpiti Marine Reserve , Kāpiti Island, whale conservation
New Zealand Transport Agency (NZTA)	Considerations regarding proximity to/visibility from the Expressway
Marine conservationists/environmentalists	Including Guardians of Kāpiti Marine Reserve

KEY TAKEAWAYS & NEXT STEPS



KEY TAKEAWAYS



- It is somewhat unique to involve the public in the sculpture construction process – through the open foundry ('whale factory') idea, and the 'Whales to Cans' recycling project for youth. These aspects of the project are likely to foster support for the project from an early stage and promote a sense of ownership of the sculpture from the local community.
- Comparative sculpture attractions are not only popular with visitors but also serve as a marker of regional identity for locals. They tell something of the local area, reflecting the place and/or surroundings. They also lend themselves to providing a focal point for supporting the marking of special occasions/events (e.g. projecting on to them, wrapping things around them, lighting them in an appropriate way etc.), but this requires management and protocols to ensure stakeholders support such activity.
- With the examples of comparative sculpture attractions in mind, there seems to be a lot of potential in the proposed location for Whale Song in that it links with cycle/walkways, is near to water that runs from the hills to the sea, is visible from the Expressway, and that it is near to a wide range of commercial and visitor facilities (for example shops, the i-SITE, banks, transport – trains/buses, eateries, petrol stations, aquatic centre, and cinemas) – if Whale Song attracts significant visitor numbers it won't necessarily require provision of new facilities but will encourage the development and support the viability of existing ones (which residents than can then also enjoy).
- Almost 80% of tourism expenditure in the District is from domestic visitors, and much of this domestic spend (just over 40%) is from visitors from other parts of the Wellington region. Kāpiti receives less than 1% of New Zealand's total tourism expenditure. There is much scope for growing inter-regional domestic tourism, and particularly international tourism in the District (which would grow the economy).
- It is thought that there is no existing similar attraction in New Zealand. The sculpture's uniqueness will be important in attracting visitors interested in whales, wildlife, history, the marine environment, art and more. It fits well with a national focus on tourism sustainability and regional dispersal, and would compliment both existing attractions, and the District's arts scene. Given it is difficult for most people to see Humpback Whales in the wild (despite them regularly traversing our coastline), the sculpture can serve as means of telling their story in a unique, accessible and compelling way. It needs to be considered however, how Whale Song fits with the Kāpiti Island offering and the potential of a 'Gateway Centre' being constructed to drive visitation there. For example, could this be located at/near Whale Song? If not, will it replicate some of what Whale Song might provide? And do stakeholders agree that visitor numbers to Kāpiti Island should be grown anyway?
- Being freely open to the public is likely to boost visitation in some respects – especially among those who happen to be nearby and didn't necessarily plan to visit, as well as educational groups as it makes a trip more affordable. Contrary to this however, is a situation where the tourism trade has nothing to 'sell' (e.g. commissionable tourism product) and so may be less interested in promoting the attraction than might otherwise be thought.
- More consideration of the ownership and management of the sculpture post-installation may be required – a range of functions will need to be carried out and paid for to ensure visitation and visitor experience is maximised (e.g. marketing, booking groups, maintenance, information provision and governance).

NEXT STEPS



- This report will be discussed with the Whale Song Charitable Trust in January 2018, with a view to finalising it, and agreeing on the scope of additional phases of work.
- Subsequent phases of work will assess response to the project from stakeholders and seek to explore what the project's critical success factors will be (for example market needs and expectations, and attributes that will attract support from the local community). In the same way what makes the project 'feasible' needs to be defined – is it if someone will pay for it? If residents don't hate it? If visitor expenditure increases?
- Other considerations for the project more generally might also be discussed/mitigated/resolved before it progresses – for example:
 - How will the *perception* of the sculpture creating a driver distraction be overcome? (indications are that this is unlikely to be an issue from an NZTA perspective, but comment on media articles suggests this will be a common objection from members of the public)
 - What will be the response to other potential objections (e.g. attractor of graffiti, cause of more congestion on Kāpiti Road, Kāpiti isn't Kaikoura, Kāpiti Island should not grow visitor numbers etc.)
 - Is the budget for the project realistic, and transparent?
 - The extent to which it's problematic for the development of tourism in Kāpiti that the attraction is not a commissionable tourism product and whether there are commercial opportunities that could be explored (e.g. guided tours, paid virtual reality app option, Kāpiti 'Gateway Centre' on site etc.).
 - If/how the project can be or should be more formally linked to conservation efforts (e.g. growing the number of Humpback Whales, supporting the work of DOC on Kāpiti Island or in the Kāpiti Marine Reserve etc.).
- Consider the timing of the project from here – what information about the project will be made public and when (given the next step is to start talking to people more widely about it), what needs doing prior to closure of Lotteries funding rounds, and what the construction/installation timing may be (including consideration of the timing for the Coastlands expansion development and how that fits in terms of access to the site and the visitor experience).
- Consider further the facilities in or surrounding the site plan – more information is needed around stakeholders requirements such as bus parking, car parking, toilets, shelter, places to sit down, translation of interpretive material, demand for tours, provision of rubbish bins, fencing, place to get coffee, lunch, petrol, etc. – and what is essential versus desirable versus not needed. This may also stimulate thinking around the extent to which Whale Song is a 'managed' tourist attraction versus a more 'hands-off' style object of public art.

Source: <https://www.stuff.co.nz/motoring/news/67512256/turning-transmission-gully-and-kapiti-expressway-into-a-sculptural-highway>