

**Outdoor Recreation Review
Initial Findings Report
July 2008**

Acknowledgements

Sport and Recreation New Zealand acknowledges and thanks all those who have provided input to this review.

SPARC is very grateful to the Countryside Council for Wales for readily sharing their findings of the Comparative study of outdoor recreation in ten countries.

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Executive Summary

In 2006 the outdoor recreation sector indicated to Government that a review of the outdoor recreations sector was needed. The sector was described as ‘rudderless’, fragmented and under-valued, and as such, limiting its potential to improve individual, community, environmental, economic and national outcomes. Improved coordination and collaboration was also considered necessary in order to meet the challenges of a changed and changing context, such as increased urbanisation, ageing populations, decreasing club membership, increasing pressure on environments and increasing demands for eco- and adventure-tourism.

In 2007 the Minister for Sport and Recreation and the Minister of Conservation agreed to undertake a sector review to initiate the development of a sector-wide strategic framework. A sector Steering Group was established to provide input to the review and communication links with the sector.

This report presents the findings from a review of relevant research and consultation with key stakeholders during 2007 and 2008.

The review has identified the potential for outdoor recreation to provide a point of difference in the quality of life offered in New Zealand; to develop healthier communities and individuals; to sustain a growing domestic and international tourism sector and other economic opportunities; and to provide more New Zealanders with an opportunity to experience and value New Zealand’s environment. Of particular note is the restorative value of outdoor recreation and its provision of a context in which young people can develop self-sufficiency, self-responsibility, problem-solving and life leadership skills.

Evidence suggests that large parts of our communities are not sufficiently active to maintain basic good health, that people’s discretionary time is decreasing, and that the availability of inactive screen-based leisure pursuits is increasing, especially for our young people. This signals the need for information about outdoor recreation opportunities, benefits, training, funding, and support to be better coordinated, consistent, accurate and accessible to participants, providers and facilitators.

In some areas of the sector there is evidence of innovative responses to current needs and trends. However, the lack of a strategic framework for the sector has seen ad hoc progress across the sector as a whole. Improved coordination, collaboration, capacity and capability are considered necessary to enable the sector to meet the current and future challenges in a way that maximises opportunities, benefits, investment and resources.

Outdoor recreation contributes to government objectives related to conservation of the environment, management of resources, economic performance, health and wellbeing, and national identity. The review identified that central and local government investment and involvement in outdoor recreation is extensive. However, there is a need for greater collaboration and coordination between agencies to maximise efficiencies and improve the profile and value of outdoor recreation.

Stakeholders consider government has a key role to play in developing a strategic framework for recreation, particularly as no agency is currently responsible for the promotion of outdoor recreation across government or throughout the whole sector.

Stakeholders reported that the organisational health of the sector is inconsistent and generally uncoordinated in its efforts to achieve what was generally found to be a common vision for the sector. A lack of strategic direction and leadership was seen as being frustrated by conflicts in some areas, particularly shared use of outdoor recreation environments and resource constraints. The lack of a framework in the sector was seen as a contributing factor in the sector’s limited ability to effectively advocate for outdoor recreation both within government and elsewhere.

Sector stakeholders considered that duplication of roles and efforts, which currently exist in the sector, contribute to the competitive nature of the sector, uncoordinated and often competing responses to sector needs, unhealthy competition between agencies due to limited resources, and contradictory messages from the sector to government. Other factors that limit the sector's effectiveness include an aging club membership, increasing trends for participation in non-club recreation activities, competing demands on volunteers, gaps and overlaps in the qualifications options, and relationship breakdowns among sector groups.

Outdoor recreation funding from its various sources was reported as being fragmented and uncoordinated, resulting in inefficiencies and potential duplications. A factor in this situation was reported as a lack of understanding about funding sources, timing of application rounds and criteria for receiving funding, along with what was described as a competitive and low-trust sector environment.

Pressures on outdoor environments are frustrating attempts to establish sector cohesion and collaboration. While there is general agreement on the need to protect and manage the environment in which outdoor recreation occurs, competing demands within and between sections of the sector have generated a complex set of relationships. Often the conservation value of an environment is in conflict with the need to provide safe and efficient access to such environments. Tensions also exist around increased commercialisation of outdoor recreation, particularly mechanised adventure tourism where this occurs in areas where non-mechanised recreation activities occur. Stakeholders also reported the increased use of outdoor environments has resulted in these areas experiencing more rubbish and human waste, lower water quality and loss of biodiversity, negative impacts on high value landscapes, and traffic congestion.

Collaboration, planning and compromise are needed to ensure safe and equitable access is maintained to sustainably managed environments.

The review identified the fragmentation of training qualifications. This was considered a contributing factor to duplication of training qualifications and confusion in the sector, uncertainty for employers and inefficiencies of effort and use of funds. Furthermore, some parts of the sector consider that New Zealand's safety standards are lower than some other countries that have high rates of participation in outdoor recreation. It was suggested that standards, qualifications and safety management schemes within a strong framework are needed to deliver education and training in the sector.

The review identified a significant lack of comprehensive information relating to outdoor recreation in New Zealand and that this has compromised the ability of sector groups to plan and invest strategically in outdoor recreation. Where data and research is available, no effective centralised mechanism is in place for the collection and dissemination of information exists.

The sector considered it timely to develop a coordinated framework to ensure that the outdoor recreation sector is well placed to meet the challenges identified in this review both now and in the future.

1. Introduction

This report presents the initial findings from the consultation and information gathering stage of the outdoor recreation review which was commenced by SPARC in 2007.

The report outline is as follows:

- section 1 contains the background, scope and limitations of the review;
- section 2 identifies the value of outdoor recreation based on international and New Zealand-based evidence;
- section 3 identifies New Zealanders' participation rates in outdoor recreation activities;
- section 4 identifies stakeholders in the outdoor recreation sector ie, government, sector organisations, training and qualification bodies and commercial groups; and
- section 5 reports the key challenges facing the outdoor recreation sector based on the review findings.

1.1 Scope of the review

The outdoor recreation review considers all terrestrial, airborne and waterborne outdoor recreation, including remote wilderness and backcountry areas (e.g. mountains, rivers, lakes, and forest parks) to the closer to home, city and urban areas (e.g. green parks, and constructed parks and play grounds) and the coastal environment and sea.

The review aims to capture the value of outdoor recreation, participation rates and activities, key sector stakeholders (including facilitators and providers) and key challenges facing the sector. This report contains the findings from the review that has informed a discussion document that invites public comment on the initial steps towards the development of a national plan of action for the sector.

1.2 Background to the review

The outdoor recreation sector needs to remain relevant in all New Zealanders' lives and be able to respond to key factors that are impacting on the way we access and engage in outdoor recreation activities, such as:

- an aging population;
- increasingly diverse ethnic communities;
- diverse and dynamic youth interests;
- increasingly sedentary lifestyles and associated adverse health effects;
- declining discretionary time; and
- increasing competition from sedentary activities that take New Zealanders away from contact with outdoor environments.

Review initiation

Key factors that led to the initiation of the outdoor recreation review were:

- Participants of the 2006 *New Zealand Recreation Summit, Mountains to Sea, Strategies for the Future* presented Summit recommendations to Government on how best to develop the sector. A key

recommendation of the Summit was that a national recreation strategy be developed for New Zealand. The [New Zealand Summit proceedings document and recommendations](#) are available on the DoC website www.doc.govt.nz.

- In 2006 a number of outdoor recreation organisations requested assistance from Government to undertake a review the sector and develop a strategy for outdoor recreation in New Zealand.

Review process

In early 2007 the Minister for Sport and Recreation, in agreement with the Minister of Conservation, requested that Sport and Recreation New Zealand (SPARC) lead the outdoor recreation review process. Officials from SPARC and DoC worked collaboratively to plan and implement the review which commenced in May 2007.

Initial desk research was undertaken to identify reliable national and international research and information relevant to the review. The findings from this research have been used to inform the analysis and discussion paper.

SPARC engaged extensively with the sector enabling a large number of outdoor recreation providers and facilitators to provide input, including representatives from:

- backcountry commercial and club based organisations;
- outdoor education centres;
- tertiary education organisations and schools; and
- local government, particularly recreation planners, reserve and facility asset managers, and senior local government managers.

Feedback from sector stakeholders is available on SPARC's website www.sparc.org.nz.

The review process included the establishment of a Steering Group to assist communication and information flows between the sector and SPARC. The Steering Group also provided position papers from their organisations along with those from other sector organisations. These papers are available on SPARC's website www.sparc.org.nz/research-policy/policy/key-policy-projects.

Steering Group membership consisted of members of representative sector organisations, including:

- [Council of Outdoor Recreation Associations of New Zealand](#);
- [Federated Mountain Clubs](#);
- [Fish and Game New Zealand](#);
- [New Zealand Mountain Safety Council](#);
- [NZ Recreation Association](#);
- [Outdoors New Zealand](#); and
- [Tourism Industry Association New Zealand](#).

The Ministry of Education and [Local Government New Zealand](#) were invited to provide input to the review. SPARC's [Te Roopu Manaaki](#) advisory board provided advice on Māori interests and perspectives.

SPARC consulted a number of individuals within the sector, made presentations to sector groups and attended several sector fora to inform the sector of the review and invited comment on the challenges and opportunities in outdoor recreation. Specific fora attended by SPARC officials for these purposes included:

- the [New Zealand Recreation Association](#)'s Green Pavlova Conference in July 2007;
- Outdoors New Zealand's Annual Forum in September 2007 - a summary of feedback is provided on the SPARC website in Appendix Two: Forum Feedback;
- the New Zealand Recreation Association's Annual Conference in November 2007; and
- the [Outdoor Recreation and Education Conference](#) hosted by Outdoors New Zealand in January 2008 (known as The Confluence) where preliminary findings of the review were presented to delegates. A summary of feedback from The Confluence is provided on the SPARC website in Appendix Two: Forum Feedback.

Throughout the review stakeholders were asked to consider the following issues:

- a vision for outdoor recreation in New Zealand and key changes needed to achieve that vision;
- the potential governance structure, infrastructure, mechanisms and processes needed to sustain the sector;
- what their organisation could contribute to the vision they articulated; and
- what they considered to be SPARC's (or other government agencies) contribution, role and involvement in outdoor recreation.

Specific components of the outdoor recreation sectors of a number of relevant countries were also investigated to inform options for New Zealand. A summary of these findings is available on the SPARC website, along with findings from the [Countryside Council for Wales](#) recent study of outdoor recreation in a number of countries.

1.3 Limitations

Contributors to this review provided a huge amount of information, however a number of factors have limited the review.

A significant limitation to the review process has been the lack of comprehensive rigorous data and information pertaining to outdoor recreation in New Zealand. No comprehensive baseline data currently exists. Rigorous data and information is critical to developing, planning and implementing evidence-based responses to sector challenges at the national, regional and local levels.

Where data was available it has been included in the review along with anecdotal evidence gathered from a variety of sources. Anecdotal evidence provided an opportunity to identify consistent themes and thereby reduce the likelihood of generating incorrect assumptions due to the lack of a strong evidence-base. In addition, the sector Steering Group provided a means to check consistency of feedback and comment from sector providers and facilitators. The review also included open discussions at various fora which enabled sector stakeholders to provide input to SPARC officials in an open-forum environment.

The review is further limited by there not having been a cross-government stock-take of outdoor recreation investments, funding and resources, thereby making an attempt to quantify the value of the sector difficult. Such an exercise would likely involve agencies such as the Ministries of Education, Health, Tourism, and

Economic Development, and the Department of Conservation and all territorial authorities. A comprehensive discussion of the research needs of the sector is provided in section 5.

1.4 Defining outdoor recreation

There are many definitions of outdoor recreation used across the sector and by the public. Recreation is how people spend leisure time that is free and separate from work and other tasks involved in providing and maintaining a livelihood, and is self chosen, self paced, entered voluntarily, intrinsically motivating and of its own merit.

Outdoor recreation, for the purposes of this review, is considered as physical leisure time activities that are conducted in the outdoor environment on land; on, in, or under water; and in the air.

2. Value of Outdoor Recreation

The review has identified national and international evidence of the value outdoor recreation has on people's wellbeing, the natural environment and the non-human inhabitants that share the environments in which outdoor recreation occurs.

The value of outdoor recreation is encapsulated well by the following stakeholder comments:

“The worst day's fishing is still better than the best day at work” and

“Contact with nature [gained from participating in outdoor recreation] has other benefits in encouraging people to value the planet and to recognise that people are just one part of the universe.”

The following section identifies the value outdoor recreation offers New Zealanders in the following areas:

- Health benefits – physical and mental;
- Education benefits;
- Social development;
- Environment;
- National identity; and
- Economic opportunity – tourism and manufacture of retail goods.

2.1 Health benefits

A strong theme through commentaries on outdoor recreation is the value of experiencing and understanding risk, and the development of self-sufficiency and self-responsibility. The restorative value of outdoor recreation is highly valued.

Physical health

Key findings in this area include:

- Regular moderate-to-vigorous physical activity substantially reduces the risk of heart disease, stroke, diabetes, high blood pressure, colon and breast cancer, and falls and injuries among older people.
- New Zealand is seeing significant growth in the portion of New Zealander's who are sedentary, overweight, or obese which is resulting in associated illnesses and increased medical costs.
- Internationally established health standards note that adults require at least 30 minutes per day of moderate to vigorous exercise at least 5 days per week simply to maintain good health. In children this standard is at least 60 minutes per day on at least 5 days per week.
- New Zealanders need physical activity options that are sufficiently accessible and enjoyable to encourage regular participation. Outdoor recreation offers significant opportunity for enjoyable physical activity.

Mental health

Medical research concludes that regular-to-moderate aerobic activity plays an important role in the prevention and management of many mental health disorders including depression, anxiety, and emotional distress.

Research also shows that regular physical activity can help develop feelings of positive self worth and increase levels of satisfaction with life.

A number of studies conducted in the United States, Canada and Europe conclude that:

- a positive correlation exists between increased physical activity and decreased depression;
- mentally recalling outdoor recreation activities increases positive moods that are linked to improved self-esteem and lowered depression;
- reductions in stress were associated with recreation activities in over 100 studies of recreation experiences in wilderness and urban nature areas;
- consistent physical activity increases self-esteem; and
- people with special needs report therapeutic benefit from activities undertaken in natural environments.

2.2 Educational benefits

Research has shown that quality outdoor education, adventure, and recreational pursuits that are well planned, safely managed and personalised to meet the needs of young people can lead to a deeper understanding of the concepts within traditional curriculum subject boundaries. They can also provide a context for learning, thinking and problem-solving skills, and help develop life skills such as co-operation and interpersonal communication.

Research also shows that these outdoor experiences can:

- reduce behavioural problems and improve school attendance;
- improve academic achievement, nurture creativity and be a catalyst for higher order learning;
- develop the ability to deal with uncertainty;
- develop skills and independence in a wide range of environments and social settings;
- develop active citizens and stewards of the environment;
- provide challenges and opportunities to take acceptable levels of risk;
- make learning more engaging and relevant to young people;
- stimulate, inspire and improve motivation; and
- provide skills for ongoing participation in outdoor recreation.

2.3 Social development

Stakeholders reported the value of outdoor recreation in its fullest sense as a key component of any society as it can provide a fundamental forum for human interaction, and for developing family and community connectedness. Outdoor recreation provides opportunities for people, families and communities to:

- meet and learn about new people and places;
- understand others;
- enjoy other people and share experiences; and
- build tolerance, compassion and resilience within families and communities.

Driver's research (1976) supports stakeholders' comments that the value and benefits of participation in outdoor recreation relate to the ways in which people, families and communities function more effectively.

For example, evidence suggests that shared family leisure time can improve family communication and dynamics (Huff et al 2003). Many Māori reportedly recognise a key value in outdoor recreation activities such as fishing, hunting and visiting the beach as an important means to link whānau and whenua (people and place).

A 2006 survey found that family was the most frequently listed answer to the question “Who do you participate with?” with friends the second most common (Thomas et al 2006). Volunteering in recreation areas can become a recreational activity in and of itself, and can contribute to wider community development, social cohesion and a sense of ownership and belonging.

Stakeholders also noted that participation and support of outdoor recreation is a contributing factor in developing and maintaining strong communities and a shared national identity of New Zealand as a nation of outdoors people.

2.4 Environmental

Stakeholders reported that outdoor recreation provides opportunities for people to connect with the natural environment. When people are exposed to, and interact with, an environment they are more likely to understand it and support its conservation. It was also noted that the quality of an environment impacts on a person’s interaction with that environment.

A 2006 report noted the value of recreation firmly linked with values of conservation: promoting knowledge, appreciation and experience of the natural environment is seen as a way of protecting natural heritage (Cessford and Borchers 2006). Becoming active through outdoor recreation can also help encourage more sustainable modes of daily transport such as walking, cycling or jogging short trips (e.g. to work or the dairy).

2.5 National identity

The relationship of tangata whenua to the land (turangawaewae) is central to the traditional way of life for Māori, where the land is a protector and provider and people have a guardianship (kaitiaki) role, ensuring the land and its natural resources are cared for. The concept of kaitiaki is also an expression of the spiritual dimension Māori have with the land.

For the first Pakeha settlers, survival, exploration and harvesting were of critical importance. The bush was not generally considered for recreation: expeditions were dangerous and often fatal (Devlin et al 1995).

Use of the landscape for pleasure was not widely apparent until the turn of the 20th century. In the 1950s and 1960s, outdoor recreation became a more accessible leisure option, both in urban and rural environments. Tourism became a significant economic contributor at around the same time.

Devlin (1995) notes that in the later parts of the 20th century, New Zealanders continued to embrace outdoor recreation and related skills in our picture of ‘real New Zealand’ even if not all people were themselves participants in outdoor recreation. Some of the most revered and respected New Zealanders – most notably Sir Edmund Hillary and Sir Peter Blake – are feted for their outdoor achievements.

New Zealand’s national identity as an outdoor nation is built on many of the values that are inherent in outdoor recreation including the conservation of unspoiled natural environment, active and capable New Zealanders, and shared family outdoor experiences such as bush walking and camping.

The value of outdoor recreation to national identity is an intrinsic value linked to places and activities that give us a feeling of pride as New Zealanders.

2.6 Economic opportunity

New Zealanders benefit from the contribution that outdoor recreation makes to our economy, for example through tourism, the sale of goods (e.g. outdoor clothing), compelling advertising imagery, and opportunities to be seen as a strong and innovative nation.

New Zealand's tourism trade is anchored in the outdoors as illustrated by 2005 data on the percentage of domestic and international travellers participating in the following activities.¹

Activity	Percentage of non-backpacker travellers 2005	Percentage of backpackers travellers 2005
Walking & trekking	66	89
Sightseeing	65	84
Boating	32	46
Canoeing, kayaking, rafting	6	35
Sky diving/parachuting	2	24
Bungy jumping	4	17
Dolphin watching	4	16
Whale watching	4	14

New Zealand provides recreation-focused holidays at the high end of the market for international travellers such as guided trips involving activities that range from hunting, fishing, heli-skiing, guided climbing to sailing. Commercial operators can also provide expert knowledge, skills and cultural experiences that provide a greater range and depth of experience than individuals can easily provide themselves. However many international visitors experience New Zealand's outdoor environments in a self-directed manner.

Anecdotal evidence suggests that New Zealanders are increasingly using commercial operators for package tours and this provides a convenient and often cost effective holiday experience (e.g. holiday packages consisting of rental car, accommodation and ski passes).

The two key economic opportunities generated from outdoor recreation, tourism and manufacture of good industries, are discussed below.

Tourism

Tourism New Zealand's latest international marketing campaign, 'The youngest country on earth', features images of New Zealand's natural and scenic beauty, with people engaging in a vast range of outdoor recreation activities such as hiking, swimming with dolphins, surfing, white water rafting, skiing and parapenting. International tourism promotion campaigns (e.g. 100% Pure New Zealand) have focused heavily on the natural environment and recreational activities for visitors. They have helped develop a growing international awareness of New Zealand as an adventure and eco tourism location.

The New Zealand tourism industry consists of 10 major publicly-listed tourism companies and between 13,500 and 18,000 small to medium tourism enterprises. Tourism is a major employer and supports one in ten jobs in New Zealand with over 108,600 full-time equivalent jobs provided directly through tourism and an

¹ Ministry of Tourism: www.tourismresearch.govt.nz/NR/rdonlyres/163EDAFE-A40F-4463-A36D63D692AC0DB8/21268/BackpackerReport2005.pdf

estimated 74,500 indirectly.² Since 2001 13 [Māori Regional Tourism Organisations](#) have formed and together they have formed the [New Zealand Māori Tourism Council](#).

Tourism contributes approximately \$16 billion per year to New Zealand's economy, \$8.3 billion of which comes from overseas visitors. Local studies have shown significant tourism benefits to small economies, for example the Abel Tasman National Park and the Queen Charlotte Track are worth around \$54.4 million annually to the local economy, including 468 full time jobs. Similar figures for the West Coast are \$221 million annually, and 1814 jobs.

Manufacture and retail of outdoor recreation related goods

Three manufacturing and retailing businesses provide an illustration of the growing opportunities that outdoor recreation provide: Kathmandu, Icebreaker and Ground Effect.

Kathmandu provides outdoor recreation clothing and related products. It began operations in 1987 in the founder's garage. In 2006 the business was valued at \$275 million and had 23 outlets in New Zealand, 29 in Australia and four in Britain.

Icebreaker also produces outdoor recreation clothing and has revenue in excess of \$10 million per year, with half of that revenue coming from offshore sales. Icebreaker is now sold in 1,000 stores in 17 countries and has experienced turnover growth of 811 percent in the last five years.

Ground Effect produces and sells mountain biking gear. It was established in 1994 and now exports half of its products (30 percent to Australia and 20 percent to the UK).

² Source: www.tianz.org.nz/Industry-Facts/Key-Facts--Figures.asp

3. Participants in outdoor recreation

This section will provide information on participation rates and trends, activity choices, knowledge and awareness of outdoor recreation opportunities, and the impact of outdoor recreation on the outdoor environment.

The discussion in this section is informed by the data available to the review and the anecdotal evidence provided by stakeholders during the review process. Data gaps identified during the review process (discussed further in section five) are reportedly due to:

- a lack of research into outdoor recreation;
- a lack of coordination where research is undertaken;
- a lack of resources made available to the sector; and
- the difficulties inherent in collecting data on outdoor recreation e.g. where outdoor recreation occurs informally.

While there are some measures of participation, there are no accurate estimates for participation rates in the main areas of outdoor recreation. Participation measures include facility use, time use, activity level surveys, and tracking expenditure in particular areas or on specific products. In addition there are a number of indicators of the popularity of outdoor recreation, such as club membership numbers and ticket sales for activities e.g. ski passes and fishing licences.

Changing trends in the modes of participation in outdoor recreation activities also impact on the collection of participation rates. For example, research undertaken by Land Information New Zealand³ and others indicates people are likely to have shifted away from organised activities traditionally provided through clubs, to participation in activities that are family, peer and/or whānau-based. The emergence of ‘virtual clubs’ has become a means for people to participate without the commitments associated with more ‘formal’ outdoor recreation provided by clubs and groups.

Changing patterns of participation in outdoor recreation have been identified through data and stakeholder feedback. For example, the growth of particular sports such as snowboarding and the increase in eco-tourism and adventure-tourism operations indicate international influences and the influences of growing environmental awareness. Participation rate and type of activity is also influenced by demographic changes such as aging populations, urban growth and new technologies. In some cases these challenges to ‘traditional’ recreation clubs and organisations mean finding ways to encourage new membership and engage people in activities that are close to their place of residence, often urban environments.

3.1 Participation rates

New Zealanders’ involvement in outdoor recreation varies throughout a person’s life depending on work and life/family pressures and commitments, and health and disability reasons. Research shows that parents who are involved in outdoor recreation (and physical activity in general) are most likely to have children who are involved in an outdoor recreation pursuit.

SPARC’s 2000/01 [Sport and Physical Activity Survey](#) reports less than 70 percent of New Zealand adults were sufficiently active to maintain basic good physical health (i.e. engaging in at least 30 minutes per day of

³ Cushman et al, 1991, Life in New Zealand Commission report. Vol.IV: leisure. University of Otago, Dunedin.

moderate to vigorous exercise at least five days per week). This survey also indicated declining activity levels amongst our children and young people.

While this information does not clarify the number of New Zealanders undertaking regular outdoor recreation, it does indicate that approximately one third of our population has not been sufficiently encouraged to undertake enough physical activity to simply maintain good health.

Recent research undertaken by Espiner in 2006 has indicated that nearly 75 percent of New Zealanders want to increase their overall participation in outdoor recreation.

The Ministry of Social Development's Social Report 2007 notes a lower level of participation in leisure and recreation activities in the seven local authorities in the Auckland area (68 percent) than in the rest of New Zealand (74 percent); while people in the South Island reported higher activity levels (76 percent) than people in either the central or southern North Island (both 72 percent).

Population trends

In 2051 New Zealand's population (based on medium projections) is estimated to be 5.05 million with 25 percent of New Zealanders expected to be over 65 years, compared with 12 percent of the population in 2004. In 2051 half of the population will likely be 46 years and older, compared with a median age of 35 years in 2004. In addition, the 2006 census information shows an increasingly ethnically diverse population.

Increased urbanisation and peri-urban development generally reduces the types of outdoor recreation activities people can engage in 'close to home'. For example, increased urban development can lead to the development of particular types of recreational facilities (i.e. golf clubs) that are not readily accessible to all people in the area.

Providers and facilitators of outdoor recreation will need to consider the implications of population trends when planning for outdoor recreation activities and environments.

3.2 Activity choices

The motivators behind outdoor recreation are complex, varying between individuals and type of activity. People seek out recreation as a means of social interaction and connectivity with family, friends and like-minded people; to be alone and experience isolation and peace; to carry on traditions, learn skills, and teach others; to have new experiences and challenge and test themselves; and to achieve balance in their lives. These motivators will in part determine their choice of activity.

There is evidence to suggest that many people experience significant physical and mental health benefits from outdoor recreation participation. This can be both a motivator and a welcome result of participation in outdoor recreation.

Research undertaken in 1995 by Booth and Peebles indicated that considerably more New Zealanders engage in passive outdoor activities than in physical outdoor pursuits, with the most popular outdoor activities being picnicking, going to the beach, wildlife viewing, scenic drives and short walks. The research showed that the greatest demand for outdoor recreation occurs close to urban centres and along the coast. SPARC's 2000/01 Sport and Physical Activity Survey supports this and shows that for most New Zealanders recreational activities most commonly occur close to home.

Booth and Peebles findings are supported in the 2000/01 [Sport and Physical Activity Survey](#) which indicates that:

- approximately 12 percent of New Zealand’s adults reported tramping in the 12 months before the 2000/01 survey;
- walking⁴ was the most frequently reported physical activity across all the age groups from 18 to 75+ years of age, followed by swimming⁵ and gardening;
- fishing was the fifth most frequently reported activity across all age groups;
- the greatest participation by boys was in swimming, rugby union, soccer, cycling and cricket;
- the greatest participation for girls was in swimming, organised exercise classes, outdoor games, netball and cycling; and
- tramping was significantly more frequent among people over 35 years of age.

A relatively small proportion of the New Zealand population access backcountry areas on a regular basis, with the most intensive use confined to the summer months. These people are typically affiliated to outdoor recreation clubs or individuals who are experienced trampers and climbers, canoeists etc.

The [Department of Conservation 2006 Review of Camping](#) opportunities in New Zealand showed that more than one third of New Zealanders go camping, and close to two thirds indicated an interest in camping. In addition, the research shows that between 70 and 80 percent of New Zealanders visited a national park in 2005 and 2006. The following table provides statistics from the [Department of Conservation](#) (DoC) indicating the number of people who walked New Zealand’s Great Walks during 2006/7.

Track	Total visitors 2006/07	Percent of New Zealanders visitors
Abel Tasman Coast	31,106	39%
Heaphy Track	4,470	63%
Milford Track	13,809	32%
Kepler Track	8,458	28%
Rakiura Track ³	1,772	29%
Routeburn Track ⁵	14,448	30%
Tongariro Northern Circuit	4,950 ⁴	36%
Waikaremoana Track	5,870	72%
Whanganui Journey	4,407	59%

Approximately 1.3 million ski day passes were sold to New Zealanders during the 2006 season.

4 Note the SPARC survey measured physical activity rather than physical recreation, therefore the walking figures collected may include people walking for active transport (i.e. to work or school), or as an activity primarily aimed at improving their health.

5 Note that the swimming data is likely to include outdoor and indoor swimming for health and recreation.

Approximately 75,000 freshwater fishing licences and 45,000 game bird licences are sold each year. The number of New Zealanders hunting other game (e.g. wapiti, red deer, thar, pigs, and goats) has been estimated at 150,000.

Club membership can provide an indication of activity choice, for example, the Federated Mountain Clubs and the Mountain Safety Council organisations have approximately 13,000 members across more than 80 clubs, and Yachting New Zealand has over 33,000 members. Further information on club and organisation membership rates is provided in Appendix One: Club data.

Demand for an outdoor recreation experience also comes from people who visit New Zealand, many of whom come for what the New Zealand environment has to offer. In 2006 Lonely Planet ranked New Zealand in the top ten travel destinations in the world. New Zealand was ranked second as a destination with activities suited to families, and was ranked second in the world as the most "authentic" brand, in terms of distinctive, genuine and unique cultures.⁶ New Zealand's tourism trade is anchored in the outdoors: the *100% Pure New Zealand* campaign, for example, is based around images of the outdoor environment.

Among visitors, backpackers appear to be the greatest users of outdoor recreation opportunities as shown in the table below.

Activity	Percent of backpackers surveyed who took part in the activity ⁷
Walking and trekking	89 percent
Sightseeing	84 percent
Boating	46 percent
Canoeing, kayaking, rafting	35 percent
Sky diving/parachuting	24 percent
Bungy jumping	17 percent

In all these areas, backpackers were significantly more active than non-backpacking visitors. There is, however, a more niche market of international visitors who come to New Zealand for recreationally-focused holidays at the high end of the market, served by boutique lodges, and often taking part in guided trips involving activities such as hunting, fishing, heli-skiing, guided climbing and coastal and blue-water sailing.

It should be noted that not all visitor demand for outdoor recreation is satisfied by commercial operations. A significant but unknown number of international visitors experience New Zealand's outdoor environments under their own steam.

Trends

Participation in outdoor recreation is changing. There has been a decrease in some activities, for example back-country tramping and hunting participation has declined over the last 30 years. So called 'adrenaline sports' have become an important part of the recreation spectrum, particularly in New Zealand:

⁶ Source: www.tourism.net.nz/business-centre/newsletters/2006-12.html, December 2006.

⁷ Ministry of Tourism (2006) The International Backpacker Market. Accessed at www.tourismresearch.govt.nz/NR/rdonlyres/163EDAFE-A40F-4463-A36D-63D692AC0DB8/21268/BackpackerReport2005.pdf

Synonymous with adventure, action and adrenaline, New Zealand is where it all began. Experts on how to make the most of the great outdoors, New Zealanders are eager to share it with the rest of the world . . . New Zealanders are justifiably proud of their reputation for inventing some of the most original and thrilling activities known to mankind. Cloke & Perkins (2002)

Mountain biking and other emerging and re-emerging activities like wake boarding and skate boarding have changed the level and type of participation for many people, and may be contributing to the shift from a back country to a front country and urban focus for outdoor recreation.

Advertising and media coverage have influenced demand for adrenaline recreation among youth, and among affluent, challenge-seeking adventurers ([Davidson 2004](#)).

Technological advancements from the cellular phone to Gore-Tex fabrics have meant that outdoor recreation has become more accessible to more people, and have changed the demand for and the expectations of the outdoor recreation experience. There is some evidence that technology encourages people to participate by increasing the perception of safety; however it is no replacement for development of basic safety skills and knowledge of the risks (Carr 2002).

Evidence suggests that demand for outdoor recreation could increase significantly, particularly among Maori, Pacific and other ethnic groups, many of whom aspire to take part, but do not for reasons such as cost, access, skill, knowledge and/or equipment.

The following key participation trends have been identified as:

- emergence of new sports e.g. mountain biking, snowboarding, kite surfing, wake boarding, in-line skating;
- increased accessibility of hard sports (e.g. rafting and climbing) through commercial guided ventures;
- decreased participation in tramping and other traditional recreational activities;
- increased demand for passive recreational areas: picnicking, playing (playgrounds), informal games;
- broadening focus for recreational outdoor activities from traditional focus of backcountry recreation to include urban and peri-urban recreation;
- increased tendency for designated areas for particular activities, i.e. areas and times for walking dogs on beaches or in parks;
- increased popularity of youth-focused urban recreation i.e. skate boarding and BMX;
- increased demand for recreation activities that encompass perceived and/or actual risk; and
- some previously considered 'necessary' activities (e.g. fishing and gardening) are now classified as outdoor recreation.

3.3 Awareness and knowledge

Stakeholders reported a wide range of sources for information on outdoor recreation places and activities. However, overlaps and gaps were reported which can be confusing for users. Further, information inconsistencies exist, for example in the grading of tracks and information provided on many websites.

The international comparative analysis identified a number of countries attempts to provide a 'one-stop' comprehensive web site of information for residents and international visitors. This may include information on codes of conduct for recreationalists, safety in the outdoors, where to purchase gear and links to tourism information.

3.4 Outdoor recreation environments

New Zealand's diverse environment supports a wide range of recreational activities for a population that is one of the most urbanised in the world. Recent trends show:

- 86 percent of the population live in urban areas of 1,000 people or more (2006 Census);
- peri-urban living is increasing, with between 90,000 and 110,000 lifestyle blocks (mostly between 3 to 4 hectares);
- a reduction in land under farming; and
- a blurring of urban/rural boundaries.

The diverse environment, changing population trends and shifts in the types of outdoor recreation people engage in are likely contributors to the concerns raised by stakeholders about outdoor recreation environments.

Environmental pressures

While there is general agreement on the need to protect and manage the environment to its best advantage, competing demands within, and between, sections of the sector make for a complex set of relationships. Crowding and conflict are significant threats to enjoyment and future use of recreational areas (Cessford 1999). Management agencies do not have sufficient staff and resources to continually monitor use levels, compliance with use limitations and any emerging conflict patterns. Additionally, responses to serious conflict and/or misuse may be limited by the availability of resources to attend and address such issues.

There are often tensions between maintaining the conservation values that are most valued by visitors and enabling visitors to easily access these resources in a safe and efficient manner. This tension is most readily felt in high profile 'iconic' natural areas and national parks which are popular with overseas tourists.

Many outdoor recreation stakeholders noted an increase in the negative impacts of increased use of outdoor environments such as rubbish and human waste, lower water quality and loss of biodiversity in some parts of the country, impacts on high value landscapes, and traffic congestion. Stakeholders suggested that this may be partly due to the increased commercialisation of outdoor recreation, particularly mechanised adventure tourism. Further, increased urban development and development in recreational areas has placed pressure on the conservation of open areas, particularly around coastal land and beaches. Such development may result in the displacement of traditional recreational users, particularly iwi.

Stakeholders also noted the need for development and resources to increasingly concentrate on urban and front-country recreation as population trends and recreation practices shift away from rural areas to urban and peri-urban environments.

Access to outdoor environments has also generated concern, particularly when access is through properties with stock and buildings or other structures where leaving gates open, climbing fences and litter can result in problems for the land owners.

Walking access

The [Walking Access Bill](#) aims to manage access issues through the establishment of the New Zealand Walking Access Commission to lead and co-ordinate the provision of public access to the outdoors especially around the coast, lakes, and along rivers. The Commission's responsibilities would include the provision of information about the location of existing public access, the provision of a code of responsible conduct for the

guidance of the public and landholders in respect of recreational access to the outdoors, and the facilitation and funding of negotiations for new public access across private land.

Clause 30 of the Bill provides that *‘if the Commission proposes to negotiate for an easement or lease over Māori freehold land for use as a walkway, it must do so with the owners of that land, whether those owners are trustees, a Māori incorporation, a sole owner, joint tenants, or owners in common’*.

At the time of writing this report the Local Government and Environment Select Committee were considering submissions and are due to report back in July 2008.

Preservation of environments

Increased environmental awareness is driving new policy development and new initiatives at the community level including environmental enhancement programmes, re-planting schemes and community based management schemes. Programmes are also being driven by global issues relating to climate change and the use of fossil fuels, energy use and efficiency. Stakeholders reported that this has impacted on the types of outdoor recreation people engage in, and on people’s motivations for participation in outdoor recreation e.g. people’s increased awareness of outdoor environments and/or concern for the sustainability of outdoor environments.

4. Outdoor recreation facilitators, providers and contributors

Outdoor recreation is provided for, facilitated by, and contributed to by a wide range of agencies, organisations, groups and individuals. This section aims to provide an overview of these diverse stakeholders. This section provides a sector overview and introduces the following stakeholders' interests, investments and activities in outdoor recreation:

- central government;
- local government;
- funders;
- tourism and business enterprise;
- standards and qualifications organisations, and safety management organisations; and
- sector groups (including outdoor training organisations, sector organisations, formal clubs, virtual clubs, community environment groups, and volunteers).

A more detailed database of providers, contributors and facilitators of outdoor recreation can be found on the [SPARC website](#) where updates to the database can be lodged.

Sector overview

The outdoor recreation sector includes central government, local government and sector groups engaging in, and promoting, a range of different outdoor recreation activities and experiences to achieve a range of goals in areas such as social, health, education, and business. While there is general agreement about the value of outdoor recreation to individuals, communities and the nation, the existence of competing demands within and between stakeholders make for a complex set of relationships in what has been described as a fragmented sector.

The sector does not have a national representative body. However a number of national umbrella organisations exist such as [Outdoors New Zealand](#) and the [New Zealand Recreation Association \(NZRA\)](#). Further, no government agency has sole responsibility for promoting outdoor recreation across government or throughout the whole sector.

There is evidence that the sector is experiencing pressure; in part related to increased and competing demands on outdoor environments and in part related to the proliferation of commercial and non-commercial enterprises. In some cases this has led to the development of strong relationships based on common interests and clearly identified synergies; yet, there are other instances where pressures have resulted in discord and competition. Sector issues and challenges are discussed in more detail in section 5.

4.1 Central government

Central government has a key role in setting the strategic direction for recreation, either directly or as part of broader issues, however, there is currently no government agency with sole responsibility for promoting outdoor recreation across government or throughout the whole sector.

DoC is responsible for conserving New Zealand's natural and historical heritage, and specifically to foster recreation and allow tourism in a manner consistent with conservation. DoC is required to give effect to the principles of the Treaty of Waitangi. DoC services 14 regional conservation boards, the [New Zealand Conservation Authority](#) (NZCA), advisory groups on lake use and welfare and reserves boards, all whose roles have implications for recreation.

Sport and Recreation New Zealand (SPARC) is a Crown entity, established to promote, support and encourage physical recreation and sport. SPARC works with a wide range of sports and recreational activity including outdoor recreation. SPARC's recreation-based work tends to focus on encouraging participation among those who are less active.

Other agencies with an interest or involvement in, and/or impact on outdoor recreation include the Ministries of Health, Education, Fisheries, Agriculture and Forestry, Youth Affairs, Social Development, Culture and Heritage, Economic Development, Tourism, Transport, Te Puni Kōkiri and Environment; Maritime Safety Authority, the Civil Aviation Authority, Land Transport New Zealand, Land Information New Zealand and the Departments of Internal Affairs and Labour; and Treasury.

This list of agencies demonstrates the breadth of outdoor recreation issues that are covered at central government level. Outdoor recreation is relevant to government objectives around conservation of the environment, management of resources, economic performance, health and wellbeing, national identity and our international image.

Legislation and regulation

The core statutes related to recreation are:

- [Conservation Act 1987](#) (DoC);
- [Wildlife Act 1953](#) (DoC);
- [Reserves Act 1977](#) (DoC);
- [National Parks Act 1980](#) (DoC);
- [Resource Management Act 1991](#) (Ministry for the Environment); and
- [Wild Animal Control Act 1977](#).

Other relevant legislation

Numerous statutes have an impact on outdoor recreation, including but not limited to:

- access - the Foreshore and Seabed Act 2004, Crown Pastoral Land Act 1998, Overseas Investment Act 2005;
- safety - the Health and Safety in Employment Act 1992; ACC Act 1982;
- structure and facilities - the Building Act 2004;
- environmental protection and species management - Biosecurity Act 1993; Hazardous Substances and New Organisms Act 1996; and
- crown entity structures - the [Sport and Recreation New Zealand Act 2002](#).

Policy, funding and research

Central government agencies have policies and guidelines relating to a wide range of recreational pursuits. These range from high level strategic direction statements to more detailed guidelines and rules for recreational users of the urban environment, coastal areas, rivers, lakes, mountains and air. These documents form a very broad policy framework that gives effect to the legislative requirements and approaches taken by central government agencies.

Funding of recreational facilities is, at central government level, primarily provided through DoC. SPARC is a main contributor to recreation participation funding from [Push Play](#) activities through to the [Sir Edmund Hillary Expedition fund](#). SPARC also funds trusts and organisations that promote and support recreational activity, primarily through its [national recreation organisation partners](#).

Many other government agencies fund policy and research initiatives that directly or indirectly support or promote recreation, or otherwise affect recreational opportunities. Consultation and discussion on such central government initiatives provides a linkage point between central and local government, and non-government groups with a recreational focus. More information about government investment and involvement in outdoor recreation is provided in the funding section 4.3 of this report and on the SPARC website.

Service delivery

Central government agencies deliver recreation-related services either directly or through other structures such as schools, health service providers, crown entities, local government, sector groups and national organisations like [New Zealand Fish and Game](#).

Advocacy and education

At a central government level, advocacy and education can occur between departments through consultation processes on policy. Agencies may advocate for funding or other types of support on behalf of their sector. Central government agencies are a key recipient of advocacy and lobbying from recreational groups.

Central government has a role to play in supporting initiatives that educate the public about recreation and its related benefits and costs, and the rights and responsibilities of participants.

4.2 Local government

This section refers to outdoor recreation facilities administered by local government and does not cover indoor sports stadia, libraries, community rooms used for recreational activities (craft, dance, discussion groups).

There are 57 district, 12 regional and 16 city councils in New Zealand, all of which have functions that impact on recreation. Regional councils are responsible for resource management, including water quality, coastal planning and river environments, all of which are relevant to outdoor recreation in terms of access, environmental quality and use patterns in non-urban environments. Regional councils manage regional parks including forest, farmland, river and coastal areas.

District and city councils have functions related to community wellbeing and development, environmental health and safety, recreation and culture, and land use planning and development control. All these functions relate to outdoor recreation in urban and peri-urban areas including council-provided playgrounds, sports grounds and skate parks, swimming pools, cycle ways, walking tracks, picnic sites and recreation reserves.

Legislation and regulation

The [Local Government Act 2002](#) sets out the functions of local government, including the requirement that local government work for the wellbeing and development of the community now and into the future.

Other legislation (see section 4.1) places requirements and responsibilities on local government to deliver services and carry out monitoring and enforcement roles.

Policy, funding and research

Every district and regional council in New Zealand encounters different issues, opportunities and choices as they endeavour to increase the uptake of physical activity in their communities. Every community has a range of stakeholders with a vested interest in increasing physical activity levels. In recognition of these factors, SPARC invested financially in the development of local councils' inaugural physical activity strategies, at the regional and district level. SPARC also offers additional resources to local councils in the form of research and programme initiatives - for example, [Obstacles to Action](#), [Push Play](#), [Active Communities](#) and [Kaiwhakahaere](#).

Councils must have a [Long Term Council Community Plan](#) (LTCCP) spanning at least ten years and which is subject to community consultation. LTCCPs cover recreation planning, including maximising value and minimising negative impacts resulting from recreation use and projected funding and specific project development where relevant. Strategic asset and land management planning is often relevant to recreational activities.

Most local authorities have a specific recreational strategy setting out priorities for recreation and culture, and management of resources which include recreational considerations. The SPARC website links to local authorities' [Physical Activity Strategies](#). Some councils have supporting policies on the specific services, facilities or programmes they provide.

SPARC commissioned NZRA to support local authorities to develop strategic plans for physical activity by way of liaison, advice and administration. In addition to this, the NZRA provides support services for both regions and districts in the form of strategy peer review and mentoring services.

The majority of councils' work, including recreation-related projects, are funded by ratepayers and return on council investments. It is possible that some councils e.g. councils with low rating bases, may place a lower priority on recreational expenditure compared to core services such as water and waste management. Additional local government investment information is provided in the section 4.3 of this report.

Service delivery

Councils may deliver services to communities directly or on behalf of central government. Service delivery focuses on establishment and maintenance of facilities, and protection of the environment around recreational areas and open space. Regional and district councils also monitor water quality at hundreds of coastal and freshwater river and lake sites every summer. The water quality at individual sites is often reported by regional and district councils on their websites and in their annual environmental reports. Councils liaise with health authorities to ensure that the public are warned (by signs or other means) when a site is found to be unsuitable for recreational use.

Advocacy and education

Councils have a statutory obligation to represent the interests of their communities. This includes advocating on constituents' behalfs when proposals have the potential to impact (positively or negatively) on communities. Councils may advocate on behalf of residents at local, regional and national levels. Councils must also consult and provide for community input on their business, so are often the subjects of advocacy and lobbying from residents.

Recreation groups and individuals can use these processes to contribute to and influence council policies, practices, funding decisions, land and resource use decisions and management that are relevant to recreation. Councils have an obligation to provide information to residents on their services, policies, decision-making processes, and ways to get involved.

Councils provide a number of educational opportunities for people interested in recreation. Service centres, websites and other sources of information detail what is available. Specific events can improve awareness of resources and opportunities for recreation in the community, and promote the benefits of recreation to families and communities.

4.3 Funders

Outdoor recreation funding comes from sources ranging from central government to those who participate in the recreational activities.

Central and local government are the primary funders of places and facilities for outdoor recreation. Private landowners have a smaller but important role in this area.

Volunteers play a critical role in outdoor recreation funding, both in terms of seeking and securing funding for clubs, facilities and activities, and making contributions that limit the amount of funding required to support outdoor recreation.

Central government

- Department of Conservation

The Department of Conservation (DoC) has an annual operating budget of \$270 million. It administers the [conservation estate](#), covering approximately 30 percent of the country, and worth an estimated \$2.9 billion. In 2005/06, DoC spent \$116 million on provision of recreational opportunities. From 2002 to 2012, DoC plans to spend \$349 million on a programme of replacing, upgrading and maintaining facilities.

DoC manages \$400 million worth of assets, including 12,600 kilometres of tracks, 942 huts, 13,500 bridges, platforms, boardwalks, 15,000 signs and information sites, 334 campsites, 1700 toilets and 22 visitor centres.

DoC has a limited ability to recover costs from facility users and as a result, receives approximately \$8.5 million per annum from user and concession charges. In effect, a high proportion of outdoor recreational opportunities on DoC estate are heavily subsidised by central government. While cost recovery has potential benefits in the form of added investment into outdoor recreation facilities in DoC's ambit, there is a very strongly ingrained social belief that there should be no charge (particularly to New Zealanders) for access.⁸

- SPARC

SPARC's investment in outdoor recreation primarily occurs through recognised [national recreation organisations](#) (NROs). These organisations receive direct investment from SPARC as well as assistance with business systems and programmes. Support goes to NROs in the form of national development funding, capacity building, coaching and international events.

To be recognised as an NRO, an organisation needs:

- its primary purpose to either have the provision of opportunities for New Zealanders to participate in physical activity experiences **or** the development and implementation of a sport and recreation environment that enables, enhances and sustains quality physical activity experiences (such as standards and safety, professional development and training, etc) and;
- to be registered as an incorporated body with the Register of Incorporated Societies or have Charitable Trust status;

⁸ Haque T (2006) Funding recreational opportunity provision on the New Zealand conservation estate. Policy Perspectives Paper 2006/07. Treasury, Wellington. Accessed at www.treasury.govt.nz/workingpapers/2006/pp06-07.asp

- have been incorporated and operational for a minimum of two years prior to applying for recognition; and
- demonstrate that it is the national organisation responsible for its activity.

SPARC's investment in NROs for the 2005/06, 2006/07 and 2007/08 years is shown in the table below. Note that the funding levels in 2006/07 were the same as for 2007/08.

2005/06	Organisation	2006/07 2007/08	National Development	Other
\$53,000	Sir Edmund Hillary Outdoor Pursuits Centre	\$200,000	\$90,000	\$110,000
\$299,750	NZ Recreation Association	\$188,000	\$125,000	\$63,000
\$50,000	NZ Sports Hall of Fame	\$150,000	\$150,000	-
\$135,000	Outdoors New Zealand Incorporated	\$130,000	\$130,000	-
\$246,250	YMCA	\$125,000	\$125,000	-
\$152,000	Physical Education New Zealand	\$80,000	\$80,000	-
\$ 52,500	NZ Girl Guides Association	\$70,000	\$70,000	-
\$41,250	NZ Outdoor Instructors Association	\$55,000	\$55,000	-
\$50,000	YWCA of Aotearoa-New Zealand	\$50,000	\$50,000	-
\$37,500	NZ Alpine Club	\$50,000	\$50,000	-
\$37,000	Spirit of Adventure Trust	\$44,000	\$44,000	-
\$27,750	NZ Riding for the Disabled	\$37,000	\$37,000	-
\$29,000	NZ Mountain Guides Association	\$29,000	\$29,000	-
\$13,000	Girls Brigade NZ (Inc)	\$26,000		-

2005/06	Organisation	2006/07 2007/08	National Development	Other
			\$26,000	
\$12,500	Duke of Edinburgh Awards	\$25,000	\$25,000	-
\$12,000	Federated Mountain Clubs of NZ	\$24,000	\$24,000	-
\$22,000	Boys' Brigade NZ	\$22,000	\$22,000	-
\$80,000	Scout Association of NZ	\$80,000	\$80,000	-
Total \$1,350,500		Total \$1,387,500	Total \$1,212,000	Total \$173,000

Funding for NROs is negotiated annually between NROs and SPARC, based on key strategies and outputs that align with SPARC's stated objectives.

Strategies and outputs range from specific projects like establishing a publication, or running a series of events to attract new participants; to wider ranging initiatives such as strategic development of the organisation, and information dissemination within and beyond the NRO. Skill development from basic to qualified instructor level is a key feature of a number of outputs funded by SPARC.

NROs have access to SPARC's organisational development seminar series, conferences and other fora as part of their contracted outputs. These represent valuable networking opportunities for NROs. NROs receive a monthly sector update from SPARC, providing a link to wider happenings in the sport and recreation sector.

NRO recognition from SPARC gives organisations the opportunity to apply for funding from community and gaming trusts, therefore recognition is of significant value to NROs and their affiliated clubs. Community and gaming trusts tend to provide grants for equipment and facility maintenance that is not usually covered in SPARC's contracts with NROs.

While SPARC's investment in NROs provides a link between some parts of the recreation sector and SPARC, it is not a process that, as yet, has been effective in creating links within the recreation sector. SPARC does fund initiatives around networking although this is a difficult area for NROs that are effectively competing for funding in the same space. Examples include training organisations that provide overlapping qualifications.

There is a risk that SPARC funding delivers multiple programmes to some sectors, and misses others. Because SPARC funds training and networking initiatives on an organisation rather than a sector basis, potential for cross-sectoral collaborative approaches may not be fully realised. That said some NROs, for example Outdoors New Zealand, do have a strong interagency component to their strategies and targets. While funding is guided by the objectives in SPARC's Statement of Intent 2008-2011, there is no specific strategic approach to investing in recreation as a sector, or across NROs as a group.

SPARC also provides funding to outdoor recreation through the Hillary Expedition Grants. These grants are awarded to New Zealanders undertaking inspiring, cutting edge expeditions in this country or overseas. In 2006, \$80,000 was provided to five expeditions.

A number of SPARC’s national campaign programmes focus on the development of skills and knowledge that can enable people to undertake the outdoor recreation activities of their choice. These programmes include Active Movement and Active Schools, Push Play, Mission-On, and support of National Sports Organisations and Regional Sports Trusts. NZRA provides a peer review service for groups around their recreation and physical activity strategies, a service funded by SPARC.

SPARC receives funding from the Government and the Lotteries Grants Board.

Other central government agencies

A number of other government agencies play a role in funding outdoor recreation either directly, or funding initiatives that maintain or otherwise influence the recreation environment. They include the [Ministry for the Environment](#), [Ministry of Agriculture and Forestry](#), [Ministry of Fisheries](#), and [Land Information New Zealand](#).

Local government

Most councils have a specific recreational strategy setting out priorities for recreation and culture, and management of resources which include recreational considerations. Some have supporting policies on specific services, facilities or programmes they provide.

The majority of councils’ work, including recreation-related projects, are funded by ratepayers and return on council investments.

Over all of the councils for which data could be found, sport and recreation accounted for 14 percent of operating expenditure. It should be noted that the percentage varied significantly between councils, ranging from over 20 percent to under 7 percent. Capital expenditure relating to outdoor recreation averaged 17.5 percent.

The following table represents local authorities aggregate data for the 2003/2004 year, which reported a total operating spend of over \$542.4 million on sports and recreation.

Investment area - 2003/2004	Total amount
Parks and reserves	\$267,888,673
Sports facilities	\$43,995,089
Stadia	\$44,070,932
Swimming pools	\$47,592,594
Community other ⁹	\$118,089,084
Playgrounds	\$570,075
Management and administration	\$17,662,411

⁹ Community other, includes unspecified events, plans which group expenditure by recreation, leisure and/or sport, with no additional details.

Grants – local	\$125,172
Grants - regional	\$2,398,425
TOTAL	\$542,392,455

Local authority grants were primarily given to local sport and recreation groups, charitable trusts and conservation groups working in areas which have recreation value, for example the Foxton Beach Improvement Society.

Grants

- Lottery Grants Board

The New Zealand [Lottery Grants Board](#) (NZLGB) and the eleven [Lottery Regional Community Committees](#) distribute the proceeds of Lotto and related games as grants for projects that “*enable or encourage community self-reliance, capacity building and stability, opportunities for social, civil or cultural participation and reducing or removing barriers to such participation*”¹⁰.

There are two sub-committees with particular relevance to outdoor recreation funding: the Lottery Community Facilities Fund and the Lottery Outdoor Safety sub-committee, for groups that have water and/or outdoor safety as their main purpose.

An example of NZLGB support is the Mountain Safety Council, which receives around \$1 million from the Outdoor Safety Committee. The Coast Cave and Vertical Rescue, various land search and rescue groups, the Coastguard and Water Safety New Zealand have all received funding from the NZLGB to carry out activities that respond to emergencies in outdoor recreation environments.

- Gaming and community trusts

Gaming trusts, which distribute the proceeds of electronic gambling machines back into the community, are major contributors to recreation funding in this country.

The [Charity Gaming Association](#) (CGA) was formed by New Zealand gaming machine trusts and has 29 affiliated gaming and community trusts throughout New Zealand.

Clubs appear to be the most common outdoor recreation sector recipients of gaming and community trust grants. Most grants have focused on enabling recreational clubs to develop facilities and places for recreation, buy equipment and deliver training.

In the six months to 31 March 2007, the seven largest gaming trusts distributed just over \$90 million in grants to community organisations, making them a significant financial contributor to the community sector. Recipients include a wide variety of outdoor recreation groups, rescue and training organisations. The grants are generally one-off grants for specific projects and/or equipment, rather than ongoing funding relationships.

Community trusts operate in a similar way, distributing proceeds of investments made using the proceeds from the sale of shares or other assets previously held in trust. Community trusts focus on grant applications that will result in benefit to the community, but are delivered in a way that prevents recipients becoming dependent on grants.

Clubs

¹⁰ Department of Labour, accessed at www.dia.govt.nz/diawebsite.nsf/wpg_URL/Services-Lottery-Grants-Index?OpenDocument

Recreation club members provide support for outdoor recreation through their subscription fees, fundraising, donations, and volunteer input (see below). Some club subscriptions contribute to affiliations with national organisations; for example members of the New Zealand Alpine Club also gain membership to the Federated Mountain Clubs.

Club subscriptions range widely depending on the type of club and the services it provides. Most clubs offer subscriptions at different levels for families, students, senior citizens, long-term or lifelong members, or for members of affiliated clubs.

Clubs also allow members to make donations for particular funds, for example facility funds and expedition funds, subsidised trips or training opportunities. Clubs involved in relatively high-cost recreational activities (for example gliding), sometimes purchase equipment for club use rather than rely on individual members to purchase their own equipment. Clubs therefore provide recreational opportunities for people who might otherwise not have access.

Other funding sources - commercial sponsors and donations

Corporate contributions are playing an increasing role in supporting outdoor recreation in this country. Companies provide funding to facilities and recreation area projects, and to groups or individuals engaging in outdoor recreation activities and expeditions from school groups to high altitude first ascents.

An example is the Slush Fund provided by [Ground Effect](#), a mountain bike clothing company based in Christchurch. The fund primarily supplements volunteer effort and public funding, and provides for (among other things) equipment purchase or hire. Grants are generally up to \$1000 for any single project.

Volunteers

Volunteers are a critical area of indirect funding of outdoor recreation as workers, trainers and instructors, administrators, advocates, drivers and trip leaders. Their participation means recreation clubs and groups do not have to seek funds to do the work that volunteers do. Club members and, in a number of cases, other users, benefit significantly from volunteers' work.

The value and extent of the volunteer contribution to outdoor recreation is unknown, and it would be difficult to quantify accurately. However, stakeholders considered that volunteer involvement increases people's opportunities to participate in outdoor recreation.

Private landowners

A number of private landowners provide in-kind support for outdoor recreation in a number of ways. Where landowners allow access for recreational purposes, they provide opportunities for participation. This can include recreational use of farm tracks, bridges and other facilities developed for farming purposes and which facilitate recreation. In some instances, landowners have set aside parcels of land for conservation purposes, protecting and facilitating recreational opportunities.

Recreational access to, or across private land, is not guaranteed, and is often contentious. There are a number of long standing, successful examples, such as rock climbing on Māori land at Whanganui Bay, Lake Taupo, which rely on trust and respect for the rights and wishes of the land owners. In turn, recreationalists receive access to high quality recreational sites for a minimal fee (koha), or without cost.

4.4 Tourism and business enterprise

A number of commercial operators provide outdoor experiences for New Zealanders and international tourists. The operators and agencies engaged in the provision and or support of these ventures are discussed

in this section. The economic contribution that such activities and ventures provide to New Zealand's economy is included in section 2.6 of this report.

Eco-tourism and adventure tourism

The fastest growing segment of the global tourism industry is adventure and eco-tourism. New Zealand's reputation as an adventure and eco-tourism location has resulted in steady growth in this sector.

A Masters thesis undertaken by Angela Dickey at Otago University in 2004 identified 294 eco-tourist operators representing a 5.8 percent growth in such operators over the previous five year period. Operators provided activities such as wildlife interactions, bush/beach walks, scenic tours, exploration of forest/bush and coastal/ocean habitats, and river and geological features, and bird and marine mammal watching. Dickey's research also found a:

- strong overlap between eco-tourism and adventure tourism;
- growing cultural presence, substantial mechanised vehicle use (especially from boats);
- significant number of operators who could be considered nature-based; and
- growing importance of the marine environment for New Zealand ecotourism.¹¹

Māori commercial operators

There is an increasing number of iwi, hapu and urban Māori groups involved in developing commercial recreation enterprises. Since 2001 thirteen Māori Regional Tourism Organisations have been formed and together they make up the New Zealand Māori Tourism Council.

Many Māori commercial enterprises in outdoor recreation have some distinct differences from non-Maori enterprises. For example a lot of Māori assets are owned collectively by whānau, hapu iwi or are Māori owned enterprises managed by Land Trusts and Incorporations. These business models are often driven by socio-cultural motives like the desire to improve the well being of whānau, hapu or iwi.

[Ngāi Tahu Holdings Group](#) is an example of a Māori commercial operation with the characteristics noted above. Ngāi Tahu Holdings Group is one of the largest tourist holding companies in New Zealand with ownership of high profile tourist ventures including Shotover Jet, Franz Joseph Glacier Guides, Dart River Safaris, and Rainbow Springs. [Ngāi Tahu Tourism Limited](#), as a subsidiary of Ngāi Tahu Holdings Group, is the parent company for a number of tourism businesses offering experiences such as boating, guided walks, whale watching and eco-tourism ventures. A proportion of Ngāi Tahu profits are distributed to the Ngāi Tahu Charitable Trust for social, cultural and environmental development.

Economic development of tourism

[Tourism New Zealand](#) is the umbrella national tourism organisation responsible for marketing New Zealand as a tourist destination overseas. Regional tourism organisations provide an important link between tourism operators, national tourism bodies and local and central government. Information centres ([i-SITES](#)) and the AA travel '[101 must do's for Kiwis](#)' provide important opportunities for promoting outdoor recreation to New Zealanders and overseas tourists.

[The New Zealand Tourism Strategy 2015](#) provides a sector-wide focus on:

¹¹ Angela L Dickey, Masters thesis: '*The development of commercial New Zealand Ecotourism: A longitudinal study (1999-2004)*'

- delivering a world-class visitor experience;
- ensuring the tourism sector is prosperous and attracts ongoing investment;
- taking a lead role in protecting and enhancing the environment; and
- helping communities and regions recognise the benefits of tourism.

[Regional Economic Development Agencies](#) assist in the development and implementation of regional economic development strategies. These strategies generally incorporate initiatives to enhance tourism and commercial outdoor recreation opportunities.

The review identified some social and economic consequences of the increased demand for outdoor recreation activities being the displacement of local residents in a number of popular tourist areas, for example in:

- Kaikoura where the domestic and international tourists attracted to various outdoor recreation activities placed pressure on facilities and local authority services and infrastructure; and
- Queenstown where workers are needed to service the day-to-day needs of the residents and the tourist industry but find they are unable to afford to live in the area.

4.5 Standards, qualifications and safety management

Part of the appeal of outdoor recreation is around participants testing themselves in a challenging environment where risk, and appropriate management of risk, is a key component of the appeal of the activity (Davidson 2004).

The review identified the need for standards, qualifications and safety management schemes within a strong framework that will deliver education and training in the sector.

The two studies below illustrate the need to ensure safety and risk management considerations are met.

In 2006 research by Bently, Macky and Edwards¹², over 18,500 ACC claims by New Zealanders were analysed for the year to June 2005 to determine the role of adventure tourism and adventure sports in injury claims. The key findings included:

- 20 percent of all ACC claims costing more than \$100 million per annum are attributable to sport and recreation, including;
 - swimming, boating and fishing \$18.2 million;
 - equestrian \$6.9 million;
 - cycling \$5.4 million; and
 - snow sports \$5.7 million.
- tramping/hiking, horse riding, biking and surfing comprised 60 percent of adventure sport injury claims mostly related to falls (69 percent), collisions (10 percent) and lifting and carrying (8 percent), [figures do not include overseas visitors].

Of the 27 fatalities from adventure-type pursuits during the period of the research, three involved horse riding, two tramping, six mountaineering and two white water rafting. Another six people were killed while fishing. Relatively few injuries resulted from activities with arguably higher perceived risk such as bungy jumping and

¹² [Injuries to New Zealanders participating in adventure tourism and adventure sports: An analysis of Accident Compensation Corporation \(ACC\) claims,](#)

sky diving and it was noted that people who participate in outdoor recreation on their own are more likely to be killed than those involved in commercial adventure tourism, contrary to public perception.

A 1999 study by [Bentley](#) reveals that adventure tourism accounted for 18 percent of injuries to overseas visitors admitted to hospital between 1982 and 1996 and 22 percent of fatalities from 1979 to 1995. Of those, 50 percent resulted from mountaineering and tramping. The adventure tourism injury rate is 8 per 100,000, compared with 12 per 1000,000 for injuries while driving, despite many more tourists driving than taking part in adventure activities.

The research also shows that bungy-jumping, jet boating and rafting, all covered by government regulations, have much lower injury counts than cycling and horse riding. Skiing, tramping and mountaineering involve the greatest risk but are largely unregulated and involve participants in the biggest at-risk group of males in their 20's.

Standards and qualifications processes

Current qualification processes are listed below; however this may not represent a comprehensive list:

- Register of Outdoor Safety Auditors

The [Register of Outdoor Safety Auditors](#) (ROSA) is a collective of trained outdoor specialists who prepare and/or verify outdoor safety management systems. The aim is to enhance safety in the outdoor industry. ROSA circulates relevant information amongst its members and holds annual moderation workshops.

ROSA is a sub-committee of Outdoors New Zealand and reports to the Outdoors New Zealand Executive Board. Along with offering a variety of outdoor safety consulting services, ROSA auditors also conduct the OutdoorsMark audits for Outdoors New Zealand. DoC recognises ROSA as the sole source of external auditors for concessionaires.

- OutdoorsMark

Outdoors New Zealand's [OutdoorsMark](#)TM is a national outdoor safety quality assurance programme designed specifically for organisations involved in outdoor education, recreation, and adventure activities. Outdoors New Zealand has developed OutdoorsMark to provide the sector, and the public participating in outdoor activities, with visible methods and proof of adhering to best practices and industry accepted standards for outdoor safety.

The OutdoorsMark safety-focused audit provides an independent process for assessing the robustness of organisational safety policies, procedures and practices for alignment with currently accepted outdoor industry standards. OutdoorsMark provides a comprehensive audit from the qualifications of programme facilitators and the integrity of equipment, sites and facilities, to the policies and procedures used for operational contingency planning.

OutdoorsMark audits are conducted by ROSA and organisations achieving the required standard are granted OutdoorsMark accreditation for a period of 3 years, subject to annual self-assessment and renewal declarations.

- Minimum Assessor Requirements

Some unit standards developed and run by the [Sport Fitness and Recreation Industry Training Organisation](#) (SFRITO) require assessors to hold specific qualifications. [Minimum Assessor Requirements](#) apply to

snowsports, community recreation, dive courses, rafting and Te Ao Turoa (knowledge of Māori culture and customs).

- Outdoor Leader Standards and Qualification Alignment Project

In 2005 the New Zealand [Outdoor Leader Standards and Qualifications Alignment Project](#) (OLQAP) was initiated by Outdoors New Zealand and key partners in the sector. The three-year project seeks to establish an integrated and comprehensive model for training, qualifying and revalidating outdoor leaders in New Zealand. It encompasses a full range of educational, vocational (commercial) and volunteer outdoor leader needs.¹³ Key findings from this project can be found on [Outdoors New Zealand website](#) and include:

- an integrated model for training, qualifying and revalidating outdoor leaders is needed to make better use of limited sector human and financial resources for maximum sector gain;
- funding deficiencies, a lack of sector structure, and organisational overlaps being key challenges for aligning qualifications in the outdoor sector;
- significant inconsistencies exist in regards to national and non-national standards, training, syllabi, assessments, moderation and revalidation;
- qualification gaps in trekking, hunting fishing, biking, horse trekking, canyoning, and river sledging, and other gaps may exist;
- significant overlaps exist between bush, alpine and rock qualifications offered by the New Zealand Outdoor Instructors' Association; New Zealand Mountain Safety Council; New Zealand Mountain Guides Association; and SFRITO - similar overlaps exist for outdoor assessments and in the production of resources;
- many outdoor qualifications do not fit the New Zealand Qualifications Authority criteria for placement on the National Qualifications Framework; and
- stakeholders indicated they were prepared to accept change and make concessions in order to achieve the project vision and move the sector forward.

- New Zealand Outdoor Registration Board

The [New Zealand Outdoor Instructors Association](#) (NZOIA) has recently announced the establishment of the New Zealand Outdoor Registration Board (NZORB). NZOIA notes a desire for standard setting by those working in the industry through a 'guild' structure and that these standards apply to both those making a living from instruction and guiding and those volunteering in the sector.

Full membership is being offered to those organisations that provide vocational qualifications, and associate membership is being provided to clubs and government agencies. However, NZORB is to be a sub-committee of the NZOIA executive and accordingly decisions of the NZORB need to be ratified by NZOIA.

SFRITO is working in partnership with NZOIA on the NZORB. The expectation of this partnership is that the pathway to registration will be integrated into the national certificate and diploma process.

The NZORB has arisen during the period when many of the relevant sector organisations have made a commitment to OLQAP and may contribute to further duplication and/or sector confusion regarding an appropriate qualifications framework for the sector.

¹³ The project does not cover standards and qualifications for motorised forms of recreation.

At this point in time it is unclear what the implications are of the announcement of the NZORB to the OLQAP.

- Tertiary institutions

There are a number of universities and polytechnics providing outdoor recreation courses, and diplomas. Lincoln University runs degree and diploma courses in recreation management, which includes outdoor leadership, community recreation, and parks. Otago University also offers a postgraduate diploma in outdoor education.

Research on outdoor recreation participation and trends is also undertaken, with Lincoln University researchers exploring the development of an outdoor recreation research strategy.

- Equine Industry Training Organisation

The [Equine Industry Training Organisation](#) provides training that supports the activities of a number of equine-related recreational groups including Riding for the Disabled. The training framework enables career pathways and qualifications that are NZQA accredited beginning at Level 2 through to Level 4.

International approach to qualifications

Most countries and states provide formal qualifications systems for vocational operators and voluntary qualification for education and volunteer sectors.

For example, New South Wales runs an accreditation programme for outdoor education and recreation organisations. The programme examines an organisation's policies and procedures, checking that it complies with industry best practice. More information relating to practices around outdoor recreation in other countries can be found on the SPARC website.

Safety management

Current safety management includes:

- Maritime New Zealand

[Maritime New Zealand](#) (formerly the Maritime Safety Authority) is a Crown entity formed to ensure the maritime environment is safe, secure and clean for all its users. Its vision is “*a maritime environment with minimum deaths, accidents, incidents and pollution as part of an integrated and sustainable transport system*”.

With respect to human safety, Maritime New Zealand investigates the causes of maritime accidents including health and safety responsibilities; educates the maritime community on safety and environmental issues; provides navigation aids, maritime distress and safety radio services; provides search and rescue expertise; and educates the recreational boating sector about safe boating behaviour.

- Water Safety New Zealand

[Water Safety New Zealand](#) (WSNZ) was formed in 1949 to ensure all New Zealanders are safe in the water (at home or at the pool, beach, lakes, rivers and sea). WSNZ conducts major public awareness campaigns and supports nationally recognised education programmes. It produces brochures, booklets, posters and videos to raise public awareness of safe practices.

WSNZ maintains an extensive database of drowning incidents, undertakes research, and advocates to and advises the government and other agencies.

- Mountain Safety Council

The [New Zealand Mountain Safety Council](#) (MSC) was formed in 1966 in response to concerns about the increasing number of accidents in the bush and mountains. Representatives from a number of government and recreational organisations formed an incorporated society with the goal of enhancing safety in land-based outdoor recreation activities.

MSC today is an organisation with approximately 27 branches, over 1000 volunteer instructors and 17 member organisations. MSC's mission is to *“enable people to enjoy their recreation safely in the outdoors; foster positive community support for outdoor safety; and promote the development and maintenance of national outdoor safety standards for land based activities”*.

The activities of MSC include enabling, supporting and facilitating the delivery of the outdoor safety message and practice. This includes developing and monitoring training programmes, producing technical manuals, and publicising outdoor safety.

MSC looks to the advice of expert standing committees regarding best practice, equipment and standards in the areas of abseil and alpine; bush craft; education; firearms; the Hunter National Training Scheme; outdoor first aid; research; risk management; and snow and avalanche.

- LandSAR

[New Zealand Search and Rescue](#) (LandSAR) is a national volunteer organisation that provides land search and rescue services to the Police and public of New Zealand.

LandSAR has over 2,500 trained volunteers who are members of 54 land search and rescue groups organised into 7 regions. There are two national specialist groups of volunteers: LandSAR Search Dogs with 21 trained and registered search dogs; and LandSAR Caving consisting of 70 experienced cavers who are members of the New Zealand Speleological Society.

There are two other specialist groups operating as follows:

- Alpine Cliff Rescue groups are made up of experienced climbers and mountaineers who form specialist rescue groups when required for alpine and high angle search and rescue operations. Whitewater Search and Rescue groups consist of highly skilled and experienced volunteers with recreation experience and training in fast water search and rescue methods.
- LandSAR's role in search and rescue activities is formalised through a memorandum of understanding with the New Zealand Police. LandSAR also works closely with the Mountain Safety Council.

- Rescue Coordination Centre New Zealand

The [Rescue Coordination Centre New Zealand](#) (RCCNZ) is part of Maritime New Zealand and is responsible for coordinating major maritime, aviation and beacon-related search and rescue missions in New Zealand's search and rescue region.

New Zealand's search and rescue region covers more than twelve million square miles, one of the largest in the world, and stretches from mid-Tasman to half-way to Chile, from Antarctica to half-way to Noumea and extends out to include the Cook Islands. While much of the region is water and coastline, inland New Zealand is also covered where aviation searches, and searches stemming from the activation of an emergency beacon, require prompt response.

Maritime New Zealand manages the RCCNZ under a memorandum of understanding with the Civil Aviation Authority, a Crown entity that regulates civil aviation in New Zealand. RCCNZ operates on a 24 hour, seven-days-a-week basis and is staffed by a team of internationally-trained search and rescue officers. RCCNZ search and rescue partners are the New Zealand Police; Royal New Zealand Coastguard; New Zealand Defence Force; and LandSAR.

- Surf Lifesaving New Zealand

[Surf Lifesaving New Zealand](#) (SLSNZ) is the national association representing the nine districts and 71 surf lifesaving clubs. The SLSNZ's purpose is to prevent drowning and injury in New Zealand and seeks to achieve this through education programmes and lifeguard services.

School-focused support includes: the Beach Education programme which is delivered to over 40,000 school-aged children and young people each year; the classroom resource for Years 1 to 8; and the Integrated Aquatic Programme teacher resource that has been developed in collaboration with WaterSafe Auckland, Surf Life Saving New Zealand, Swimming New Zealand, Coastguard Boating Education, New Zealand WaterWise, and Yachting New Zealand.

SLSNZ also provides first aid training, surf lifeguard training, and numerous other water safety programmes and support.

4.6 Sector groups

Sector groups in outdoor recreation comprise providers and administrators of environments where outdoor recreation occurs, and providers, administrators and instigators of outdoor recreation activities. A brief introduction to these groups is included in this section, and more detail on sector groups is contained in the database available on the SPARC website.

The groups outlined in this section are sustained by considerable voluntary contributions of labour, time, and/or material. All the groups share the common goal of promoting and encouraging the participation and/or protection of outdoor recreation activities and environments. Sector groups include representative groups, advocacy and community groups, and activity-based recreation clubs and groups. Less formal groups, known as 'virtual groups', mobilise participation around activities such as biking, walking, or skateboarding, on an ad hoc basis. Membership of virtual groups is fluid and dependent on an individual's availability to participate on the day. Outdoor training organisations also feature in this section.

Representative groups

These groups represent member clubs' interests and provide education, advocacy, and support services to clubs. Representative groups receive funding from various sources such as SPARC, memberships fees, fundraising and grants. Groups may be supported by a governance board and committees and may have links to international recreation organisations. They are organisations such as [Outdoors New Zealand](#), [Federated Mountain Clubs](#), [Council of Outdoor Recreation Associations of New Zealand](#) and the [New Zealand Recreation Association](#).

Advocacy and community groups

Advocacy and community groups generally form as a project-based or issue-based group to respond to an identified need or goal.

Community groups may form to undertake a range of environmental enhancement projects, such as wetland and bush restoration, sand dune restoration, or stream and river management. These activities are often driven by concerns about increasing rates of urbanisation, environmental degradation and loss of open space and are often undertaken in collaboration with local authorities, the DoC, the Royal Forest and Bird Protection Society and private land owners.

Such activities are becoming a popular form of active leisure time. They also play a valuable role in addressing environmental and biodiversity concerns in outdoor recreation spaces, and build a sense of community ownership of public spaces through local participation.

Advocacy groups generally focus on issues they consider central to recreation, such as Public Access New Zealand (advocating for preservation of public access for recreational users) and the Council of Licensed Firearms Owners. A number of other recreation groups participate in advocacy activities from time to time depending on the issue.

Recreation clubs and groups

Clubs play a key role in providing people with the opportunity to explore, learn, and participate in outdoor recreation activities. They often provide free or at-cost instruction, a pool of technical equipment for loan or hire, club facilities to host or support outdoor recreation activities, and an encouraging social environment. Many have full calendars of events spanning skill levels and providing the opportunity for ongoing participation or extension of skills and experience.

Some people join clubs to learn sufficient skills to safely participate outside the club environment. Others join as individuals or families and participate in clubs for the long-term, enjoying the social connect that a group with common interests can provide.

Clubs can provide the first point of entry for people engaging in outdoor recreation activities. They are often the training ground for people who later become important technical experts guiding, training and running search and rescue operations.

There is no comprehensive data set of clubs or club membership available in New Zealand. SPARC estimates that there are at least 1620 individual outdoor recreation clubs.

These groups provide a focal point for activities in specific recreational pursuits which are generally split into eight general categories:

- snow-based recreation;
- hunting, shooting and fishing;
- walking, tramping, climbing and mountaineering and caving;
- equestrian;
- on-water: sailing, recreational boating, windsurfing, water skiing, kayaking, rafting, surfing;
- in-water: diving, swimming (open water and rivers);
- road and trail sports: road and mountain biking, running and walking;
- motorised recreation: 4 wheel driving, motor cross and trail biking; and
- aerial sports: hang gliding, parapenting, skydiving, microlite and powered recreational flight, base jumping.

Virtual clubs

Anecdotal evidence indicates that there is growing participation in informal clubs i.e. clubs without official structures, joining fees, meetings or facilities. These are also referred to as 'virtual' clubs. Development of cell phone texting and email communication has enabled like-minded people to gather for outdoor recreational pursuits on demand (e.g. informal road or mountain bike outings, skateboarding or surfing) without the time commitment and responsibility associated with membership to formal clubs.

Outdoor training organisations

There are numerous not-for-profit organisations offering education, self development and business development using the outdoor environment as the medium for learning. These organisations are generally established trusts funded mainly through a mix of participant contribution, sponsorship and government funding. The four main outdoor training organisations the [*Spirit of Adventure Trust*](#); [*Outward Bound*](#); [*Sir Edmund Hillary Outdoor Pursuits Centre*](#); and [*Whenua-iti Outdoor Pursuits Centre*](#) have a strong focus on providing training, development and educational opportunities for young people.

A more detailed description of the four main outdoor training organisations can be found in Appendix Five on the SPARC website.

5. Sector challenges

The review's mapping process identified the diverse nature of the sector; beginning with an individual's motivation to participate in outdoor recreation, through to a community initiative to reforest an area, a local council's skate park development, eco and adventure-tourism ventures, SPARC investment in national recreation organisations, DoC's programme for maintaining remote back country huts, and the development of legislation to enable public access to recreation areas.

The sector is characterised by its diversity, which is both a strength and key contributor to sector pressures, particularly around identifying an agreed strategic sector framework. Without such a framework pressures around managing activities in shared environments, coordinating funding and resources for research and/or activities, are increasing.

The diverse nature of the sector also makes it vulnerable to inefficiencies resulting from duplication of administration, training and other costs. These inefficiencies dilute the sector's ability to respond to pressures and challenges in a timely, effective and efficient manner.

The sector was often described by stakeholders as fragmented, competitive and in need of greater levels of coordination and collaboration. However, a common theme identified by the review is the high level of commitment and passion stakeholders have for outdoor recreation and for finding the best mechanisms that will enable people's continued enjoyment of recreation in the outdoors.

This section provides an overview of the key challenges identified during the review and expressed by stakeholders who participated in the initial review process. Challenges have been identified at the:

- strategic level (government and non-government) with regard to addressing the fragmentation of the sector and funding and investment, building capacity and capability, developing an evidence base to support planning, and an integrated framework to support sector qualifications, standards and training; and
- local level (government and non-government) with regard to generating and maintaining an environment that encourages and supports people's participation in outdoor recreation through enabling accessibility to information, environments, providers and knowledge.

Key sector challenges are discussed in the following eight areas:

1. Sector health – coordination, collaboration and leadership.
2. Government involvement – working collaboratively, roles and responsibilities, and sector support.
3. Building an informed sector – research, monitoring, information collection and dissemination.
4. Resourcing – developing a coordinated and informed funding environment.
5. Environments – identifying, maintaining, and managing current and future outdoor recreation environments to enable sustainable and equitable access.
6. Education – maximising the benefits to young people and the sector of young people positive engagement in outdoor recreation.
7. Sector qualifications, standards, and training – establishing a coordinated framework that will enable quality assurance across the sector.
8. Participation in outdoor recreation – enabling participation for people of all ages and across all population groups.

5.1 Sector health

Section 4 of this report identifies the agencies, organisations, groups, clubs and other interested parties that make up the outdoor recreation sector. It is a dynamic sector, influenced by national, regional, local and personal changes in resources, technology, knowledge, lifestyles and culture. In this context, the development of a cohesive streamlined sector presents a significant, but necessary challenge. The sector was often referred to by stakeholders during the review as disjointed, factional and represented by increasingly diverse interests, from 'traditional' recreation activities through to pay-for-play 'adrenalin' activities.

While central government and local government have a considerable investment in outdoor recreation there is no central coordination of activities, funding, strategy or policy. There are some national umbrella organisations in the non-government sector that represent networks within like activities. However, such networks do not exist across the government, non-government and tourism/commercial arms of the outdoor recreation sector.

Currently there is no central administrative structure to support the sector. Stakeholders considered this to be a contributing factor to low levels of trust between and across some organisations, in a context they described as fragmented and competitive.

Stakeholders considered a more cohesive sector is needed to achieve better coordination and collaboration, reduced overlaps, improved administration and greater efficiencies from the national through to local levels e.g., improved information collection and dissemination mechanisms. Early steps in a process to build and sustain a cohesive and streamlined outdoor recreations sector were reported to be the:

- establishment of a body/collective/group/organisation/agency to facilitate the development of a framework and structure for the sector; and
- the development and implementation of an outdoor recreation national strategy.

The following issues were reported by stakeholders as areas requiring further consideration and/or support and assistance:

- developing a sector-wide governance structure to provide clear leadership;
- improvement of the communication networks across the sector;
- improved sector capacity to enable activities that build and strengthen the sector in a sustainable manner e.g., organisational leadership, increased financial assistance for programmes that develop outdoor leaders from a grass-roots level (such as Young New Zealander's Challenge - Duke of Edinburgh) and offer subsidies to community groups, clubs, and volunteer organisations for outdoor training courses and for using qualified instructors in their programmes;
- improved capability at all levels through training, support and improved information collection and dissemination;
- the need for infrastructure that will support the outdoor recreation sector and coordinate activities, research, information, training;
- the need for improved alignment of sector organisations, clubs and entities to reduce administrative overlaps, enhance communication flows, and strengthen cross-sector knowledge and understanding;
- development of robust mechanisms to assist and support sector organisations manage sector conflicts e.g., resolving conflict between outdoor recreation environment users is important to enable activities to co-exist; and
- more appropriate funding mechanisms for the sector.

It was suggested that organisations and agencies, such as DoC, need to work more collaboratively with community groups to provide and manage facilities such as huts.

A greater level of national level representation through an umbrella group was considered important as it could demonstrate:

- genuine and effective stakeholder participation and ownership;
- strong central leadership and advocacy for outdoor recreation (including contributing to legislative and central policy changes, and public promotion);
- independence (free from perceived conflicts of interest);
- high visibility and mana; and
- an ability to work with central and local government, volunteer organisations and other stakeholders, and to manage/mediate conflicts.

5.2 Government involvement

Government has a large investment in outdoor recreation at a central and local government level. However, the size and value of this investment is not always clear to stakeholders. This lack of clarity is likely to be a contributing factor to some stakeholders' perception that sport is substantially better resourced than recreation. This suggests the need to generate an inventory of government investment in outdoor recreation that includes central and local government investment.

Stakeholders saw the government's role as facilitating the management of recreation settings, such as developing and implementing legislation and regulation related to the management and development of recreation environments, rather than managing the recreation itself. Government was also seen to have a key role in promoting outdoor recreation and in assisting and supporting the sector to develop and implement an outdoor recreation strategic plan.

Improved coordination across government agencies and Crown entities was considered important for the efficient use of resources. An example may be local government and DoC working closely to coordinate information about outdoor recreational opportunities and to develop and deliver campaigns to promote outdoor recreation.

Government was also seen to have a role assisting the sector to develop robust mechanisms to resolve conflict between outdoor recreation groups, for example, to better enable outdoor recreation groups to manage the use of shared-use environments. Stakeholders suggest such mechanisms be developed in consultation with the sector to ensure they are robust and have buy-in from the sector.

A concern was also raised that a number of legislative barriers to outdoor recreation exist and need review, such as the Reserves Act 1977 which is considered by some to not have sufficient relevance to the current context.

5.3 Building an informed sector

"The New Zealand research base is growing but is often piecemeal and driven by the agendas and aspirations of individual researchers." ONZ [Position Paper](#) August 2007

The sector is not supported by a coordinated research and information framework. This situation reduces opportunities for robust trend analysis and evidence-based programme and planning development and implementation.

Stakeholders suggested the need for a framework that:

- centralises the collection and dissemination of information, data and research collected and/or generated from government, non-government and interested parties;
- provides coordinated funding for research across the sector;
- identifies information and data gaps; and
- is accessible to government, non-government and interested parties in order to ensure the integration of research findings and information into all areas of outdoor recreation.

Specific gaps included a lack of research and information relating to:

- sector groups and their role in outdoor recreation;
- the number of New Zealanders participating in outdoor recreation, their choice of activities, and their demographic makeup;
- New Zealanders' awareness of what outdoor recreation opportunities are available in New Zealand;
- the level and type of impact outdoor recreation activities are having on the environment;
- the specific outdoor recreation pursuits of Māori, Pacific and Asian people, other than that they tend to focus on recreational opportunities in the front country, urban and coastal environments;
- a comprehensive data set of clubs or club membership available in New Zealand;
- the value and extent of the volunteer contribution to outdoor recreation; and
- identifying appropriate and meaningful means to measure and evaluate less formal activities.

There are areas where research is underway. Shane Galloway from Otago University is conducting research on river based activities including who uses New Zealand rivers, for what purposes, the depth of experience within river recreation, what motivates river users, what features of rivers are particularly important to them and what rivers are actually used.

SPARC research on the participation of New Zealanders in sport, recreation and physical activity includes face-to-face interviews with approximately 4200 New Zealanders over a period of 12 months to identify the sport, recreation and physical activity they have undertaken and asks respondents about membership in clubs, organised competition, receiving coaching or instruction, and involvement in sport and recreation as a volunteer. Detailed reports from this survey will be available in late 2008.

5.4 Resourcing

Fragmentation within the sector has contributed to uncoordinated sector funding and inefficiencies in investment.

Non-commercial facilitators of outdoor recreation opportunities rely on membership fees and other sources of income from a limited funding pool. Where clubs and organisations provide overlapping services, they compete against each other for the same funds. This can strain relationships between organisations in the sector, and it can also mean that investment in the sector is less efficient than it should be.

Some members of the outdoor recreation sector have said that there is a lack of understanding about what funding sources are available, the timing of application rounds and eligibility criteria. There is an opportunity

to provide assistance to the sector to develop a database of such information to better support access to funding rounds.

When considering applications, funders require better transparency about whether applicants have other funding sources for the same project. More collaboration among outdoor recreation organisations would reduce the amount of effort wasted on unsuccessful funding applications.

A common perception across the outdoor recreation sector is that outdoor recreation is not provided the same level of investment or resource support as sport. Stakeholders suggested that resourcing for outdoor recreation should be similar to that of sport, particularly with regard to youth participation. This may include ensuring voluntary outdoor leaders have access to training and support, and free access to outdoor resources such as huts, campsites for educational purposes.

An exercise to ascertain the value of, and investment provided to, the sector has not been undertaken to date. As outdoor recreation is a part of the business of a number of central government, local government, non-government, commercial and educational enterprises it is possible that the accumulated investment and value these provider and facilitator groups have in outdoor recreation is substantial.

5.5 Environments

Stakeholders identified a need for the clear identification of use and accessibility issues relating to outdoor environments and places. This will ensure that providers, facilitators and participants of outdoor recreation are fully informed about which outdoor environments and places they have access to, under which conditions access is given, and if any restrictions of use or entry pertain to a particular environment or place. It was considered that this would assist the sustainability of environments used for recreation and manage conflicts within them.

Research supports stakeholders' feedback that the value and appeal of outdoor activities can be significantly lessened by over-development, crowding, a degraded environment, or tourism operations displacing local users (Thomas et al 2006; Higham et al 2001; Higham 1998; Kersley G 1997). Tensions between user groups are evident where competing and/or conflicting interests and/or use of outdoor environments exist and there was concern that the flora and fauna of threatened areas need protection.

Most non-commercial stakeholder groups reported over-development of outdoor environments as unacceptable, as did some commercial users who are seeking a pristine experience. The degree of acceptable development appears to depend on the type of environment visited.

Increased commercialisation of outdoor experiences raised concerns with a number of stakeholders. These concerns included:

- higher numbers of commercial users may change the experience for non-commercial users (domestic or international);
- large or frequently visiting commercial groups potentially crowding outdoor recreation facilities and resulting in displacement of non-commercial users, particularly in areas with few other options available (e.g. alpine huts);
- perception that sites and areas with highest commercial value receive a higher proportion of resources and protection; and
- pressure on high-use tourist sites may focus development on those areas, resulting in limited resources or focus on other areas.

It was suggested that there is a need to balance the capacity of tourism and favoured commercial operation sites with the environmental impact, and the quality of the experience for all users.

Tensions between users of outdoor recreation environments exist around the following areas:

- conservation of environments versus recreational use, for example four wheel drive vehicles on beaches, in streams and the creation of marine reserves which conserve environment but exclude recreational fishers;
- preservation of pristine wilderness areas versus improved access for users;
- animal control to protect native flora and fauna versus population management for recreational hunting;
- increased development versus preservation of open areas, particularly around coastal land and beaches;
- commercial versus non-commercial recreational use;
- development for tourism versus preservation of environment, for example, economic pressures can create conflict in communities as occurred in Queenstown; and
- social versus solitary/quiet focus, for example conflicts concerning hut noise.

5.6 Education

The role of outdoor recreation activities in developing life skills and contributing to the wellbeing of school children and young people is widely recognised. Stakeholders also reported the need to engage young people in outdoor recreation to ensure the sustainability of the sector. It was suggested that clubs may have a role working alongside schools and/or community-based groups to get young people participating in outdoor recreation. This would provide an environment for mentoring young people who will be the next generation of outdoor recreationalists, organisation or club administrators, trainers or educators.

To maximise these benefits stakeholders suggested:

- increasing opportunities for participation in outdoor recreation activities for children and young people;
- ensuring outdoor education experiences that provide culturally responsive and appropriate contexts for all students including Māori;
- extending the focus on outdoor recreation into tertiary environments;
- ensuring a progressive and cohesive outdoor recreation education curriculum that provides an educational, rather than recreational, component for outdoor recreation pursuits and that it is closely aligned to the New Zealand Curriculum;
- improving training of teachers and volunteers as leaders in outdoor recreation to ensure environments are safe while minimising compliance;
- developing a mechanism to assist schools identify/assess the value of outdoor recreation so that schools can generate greater support for outdoor recreation across the whole school community; and
- resourcing outdoor recreation in a similar way as sport, particularly with a view to encouraging and supporting youth participation, training voluntary outdoor leaders, and providing free access to outdoor resources such as huts, campsites for educational purposes.

The United Kingdom's [Learning Outside the Classroom Manifesto](#) was suggested as a potential model that could be adapted to fit the New Zealand context.

5.7 Sector qualifications, standards, and training

To date there has been duplication and disconnectedness of the training and qualifications on offer in New Zealand. This has led to confusion within the sector, uncertainty for employers and inefficiencies of effort and available funds.

Further, some parts of the sector consider that New Zealand's safety standards are lower than other outdoor recreation-oriented countries. The sector considers that New Zealand's health and safety in employment and accident compensation legislation provide little incentive for people to be appropriately qualified. And, providers of places for recreation do not require commercial operators to be appropriately qualified.

The New Zealand Outdoor Leader Standards and Qualifications Alignment Project (OLQAP) was initiated by Outdoors New Zealand and key partners in the sector and goes some way to addressing the issues. However it does not represent a comprehensive national standards and qualifications framework.

In addition, stakeholders noted that better coordination of opportunities to train, qualify and revalidate outdoor leaders (whether teachers, volunteers or vocational), and develop coherent pathways to the outdoors as a career are also needed.

A lack of clear and transparent leadership, training and qualification pathways for all models of outdoor recreation limit the development of a strong professional base.

Stakeholders also noted the need to ensure commercial operators are included in sector development processes, as they have a key role to play in promoting outdoor recreation through the marketing of their products and/or services.

5.8 Participation in outdoor recreation

Key challenges to participation in outdoor recreation were identified as:

- availability of information provided to users and potential users;
- accessibility and availability to outdoor recreation environments and activities that meet participants needs e.g. young people and increasingly urban and aging populations; and
- sector sustainability.

Information collection and dissemination

Stakeholders reported a large number and type of information sources available on outdoor recreation places and activities. However, this appears to be leading to confusion, overlaps and gaps in information. While posting and sourcing information on the internet is considered an effective mechanism for providing up-to-date information, it was also noted as being a contributing factor to the large volume of, and inconsistency in the information available to potential outdoor recreation participants. For example, inconsistent and confusing signage and grading of many tracks and other outdoor recreation facilities were reported to the review team.

No organisation or body has responsibility for coordinating the collection and/or dissemination of information relating to outdoor recreation. Further, there appears to be little or no coordination between providers of outdoor recreation information, and no central location or site for participants, providers and facilitators of outdoor education to lodge or seek information. Providers of information include the retail and tourism operators, government agencies, local authorities and sector groups.

A 2006 review of camping opportunities in New Zealand noted a lack of knowledge about equipment needs, where campsites are located, and facilities available at camp sites was a barrier to people taking up camping.

A number of countries have attempted to provide a 'one-stop' comprehensive web site of information for residents and international visitors. Such sites can also provide information on codes of conduct for recreationalists; safety in the outdoors; where to purchase gear and links to tourism information. One example is the British Columbia Outdoor Wilderness Guide that can be found at: www.bcadventure.com/adventure/wilderness/survival/educators.htm.

Accessibility issues

Key factors limiting people's access to outdoor recreation, other than the provision of accurate, accessible and up-to-date information and lack of appropriate facilities, include:

- time constraints;
- family / work commitments;
- cost associated with particular activities, and costs related to some activities which may only be available through commercial means;
- lack of companions;
- lack of skills or ability;
- accessible and affordable transport options; and
- factors specific to aged or disabled participants.

This is supported by Borchers and Cessford (2007) research which identifies the key barriers to active leisure and recreation as:

- physical inability to undertake particular activities;
- a lack of time;
- other life commitments; and
- a lack of energy.

Borchers and Cessford research shows that barriers are different for active people and inactive people, and for different activities or types of activities. Barriers also vary for different aspects of leisure, that is, increasing current participation, starting new activities, restarting former activities, or increasing one's satisfaction with current activities. The experience of barriers appears to be different in some cases for certain sub-populations such as ethnic minorities or different age groups or generations.

It is noted that this research is based mainly around recreation associated with public conservation lands and waters further away than local reserves and open spaces managed by local government and other providers.

Stakeholders suggested that recreation providers and facilitators need to remain aware and responsive to the implications that increased urbanisation, population growth and an ageing population has on people's outdoor recreation needs in order to tailor programmes accordingly.

Borchers and Cessford noted that a lack of companionship may be a reason that some people do not participate in outdoor recreation, suggesting the need to respond to the recreation needs across life stages and abilities.

Sector sustainability

Stakeholders identified a need to ensure young people are engaged in outdoor recreation as participants alongside mentors who are able to share the skills and knowledge required to ensure the infrastructure of the sector is maintained. The review identified changing patterns of participation, such as the emergence of virtual clubs, which enable less formal non-solitary participation, but which may reduce affiliation with groups and clubs. Developing a sustainable coordinated and collaborative sector with clear communication flows and the identification for synergies could prove difficult in an environment with reduced club and group membership and the resulting capability and capacity.

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