

The development of Rugby Super 12 and its implications for tourism: The case of the Otago Highlanders.

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Executive Summary

This report presents a detailed analysis of the impacts of Rugby Super 12 on the tourism industry in the Otago Highlanders region. It presents the results of a qualitative programme of research for which individuals involved in the administration of Rugby Super 12 (rugby unions) and tourism development (local government and tourism promotion offices) were interviewed. A sport tourism framework is presented in this report and used to explore the impacts of sport on the spatial and temporal dimensions of tourism. The manner in which Rugby Super 12 affects travel patterns and offers potential for tourism development in the Highlanders region is then explored.

Study participants felt that Rugby Super 12 has had significant implications for tourism in Southern New Zealand. It was seen as generating increased domestic travel into and within the region, attracting people who had little previous interest in rugby and encouraging international visitors to make rugby spectatorship part of their New Zealand tour itinerary. The introduction of Rugby Super 12 to the region was reported as having increased: the numbers of people travelling, their length of stay and their spending patterns. The Highlanders were also seen to present tourism development potential in terms of:

- The promotion of Dunedin as an urban tourism destination (eg., floodlit night sport).
- The further evolution of Carisbrook as an urban tourism icon.
- The promotion of the heritage, history, lifestyles and attractions within the region.
- The differentiation of the Southern Macro-region from other regions in New Zealand.
- The promotion of the region as an international tourism destination through the televising of Highlanders games to international audiences.

Rugby Super 12 was seen as benefiting the tourism sector within the region and offering great potential for further benefits. Capturing these benefits requires that the promotional opportunities presented by the Highlanders team (and the star players within it) be incorporated into tourism development strategies. It was also recognized that while Rugby Super 12 has had positive implications for tourism, the same is true for the impact of tourism on the Highlanders franchise. That is, the travel patterns generated by Rugby Super 12 benefit the tourism industry (people travelling further to be involved in sporting occasions) but increased tourism also benefits Otago rugby (e.g., through ground attendance, atmosphere, expanded supporter base, merchandise/ food and beverage/ season ticket sales). Additional research in this area will provide an information base upon which to make decisions that can maximize the mutual benefits of this relationship between sport and tourism.

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1. Introduction

A close relationship has long existed between sport and tourism. The ancient Olympic games provide a graphic illustration of sport and competition as a motivation to travel for spectators as well as athletes. In modern times, research in this area has focussed on the economic impacts of large scale sporting events such as the summer and winter Olympic games, World Cup Soccer, Grand Prix and International Rugby tests. However, this line of research has developed in little regard for the tourism potential of regional or provincial sports and, for that matter, regular season sports rather than one-off events. This report begins to redress this imbalance by considering the tourism potential of Rugby Super 12 (referred to as Super 12 henceforth), a fourteen week rugby competition involving regional/provincial teams from New Zealand, Australia and South Africa. A sport tourism research framework is used to explore the impacts of sport on the spatial and temporal dimensions of tourism. The data for this study were drawn from the Otago Highlanders region through a series of interviews designed to solicit the observations and opinions of individuals involved in the administration of rugby and tourism throughout the North Otago, Otago and Southland region. Findings confirm the perceived significance of the Super 12 competition as a important tourist attraction in the region and suggest that more detailed studies are merited in this area.

2. The Transition to Professional Rugby in New Zealand

The origins and history of Rugby Union (rugby) are steeped in tradition. Much of this tradition is founded upon the principles of amateurism and playing for the love of the game. These traditions endured for over a century despite such threats as the creation of a rival professional code (Rugby League) over 100 years ago, the constant drain of players from the amateur to the professional code, the development of *shamateurism* (the indirect and surreptitious payment of players) and various attempts to develop professional competitions (for example in an attempt to overcome the sporting isolation of the Republic of South Africa prior to 1991 by paying players to play test matches). In 1995 this situation ended due to:

1. The creation of a global Super League (Rugby League) and the threat of the wholesale transfer of players from Union to League and
2. The creation of the World Rugby Corporation (WRC), a professional rugby corporation independent of the International Rugby Board (IRB) or the National Rugby Unions.

During the Rugby World Cup in 1995 the national unions of South Africa, New Zealand and Australia reacted to this threat by forming SANZAR (South Africa New Zealand Australia Rugby) to create a professional southern hemisphere rugby family. These unions negotiated with News Ltd to create two professional competitions, the Tri-Nations and the Super 12. The former involves a mid-season series of home and away matches between the three member nations. The latter is an early season provincial competition between teams from all three member nations. It is the Super 12 that is the subject of this report.

The New Zealand Rugby Football Union (NZRFU) branding values for Super 12 centre on entertainment. It is branded in distinction to the tradition, inspiration and aura of the All Blacks (the New Zealand national team) and their involvement in the Tri-Nations. Rather Super 12 is positioned as the 'total entertainment package'; a fast, skilful and spectacular form of rugby. SANZAR moved quite deliberately to fill this rugby niche. In order to facilitate the involvement of only the most skilled players, the NZRFU implemented a contentious regional approach to Super 12 and a system of player drafting during the team

selection process. Any initial contention, however, was soon dispelled as the regional team system received overwhelming support as indicated by spectator attendance. Such was its success that the regional approach to team selection was adopted by South Africa in 1998. The realignment of traditional provincial boundaries (Figure 1) for the purpose of Super 12 raises some intriguing questions relating to team support and supporter travel behaviour.

It is the underlying premise of this study that the introduction of Super 12 not only had a major impact on the sport of rugby in New Zealand but that it has had a major impact on tourism as well. This study explores these impacts within the context of the Otago Highlanders franchise.

3. Research Approach

This section of the report summarises the research approach used in the study. It includes a précis of the underlying conceptual framework, a description of the study area and an overview of the study methodology.

3.1 Conceptual framework

Figure 2 provides a graphic representation of the sport tourism research framework developed for the purpose of this research. This framework is built around the fundamental spatial, temporal, and motivational dimensions of tourism. Sport is positioned as the central motivational focus and nucleus of the attraction. In a sense, sport becomes the first among equals in relation to the other two dimensions (i.e., changes within the sport dimension may drive changes in the other two).

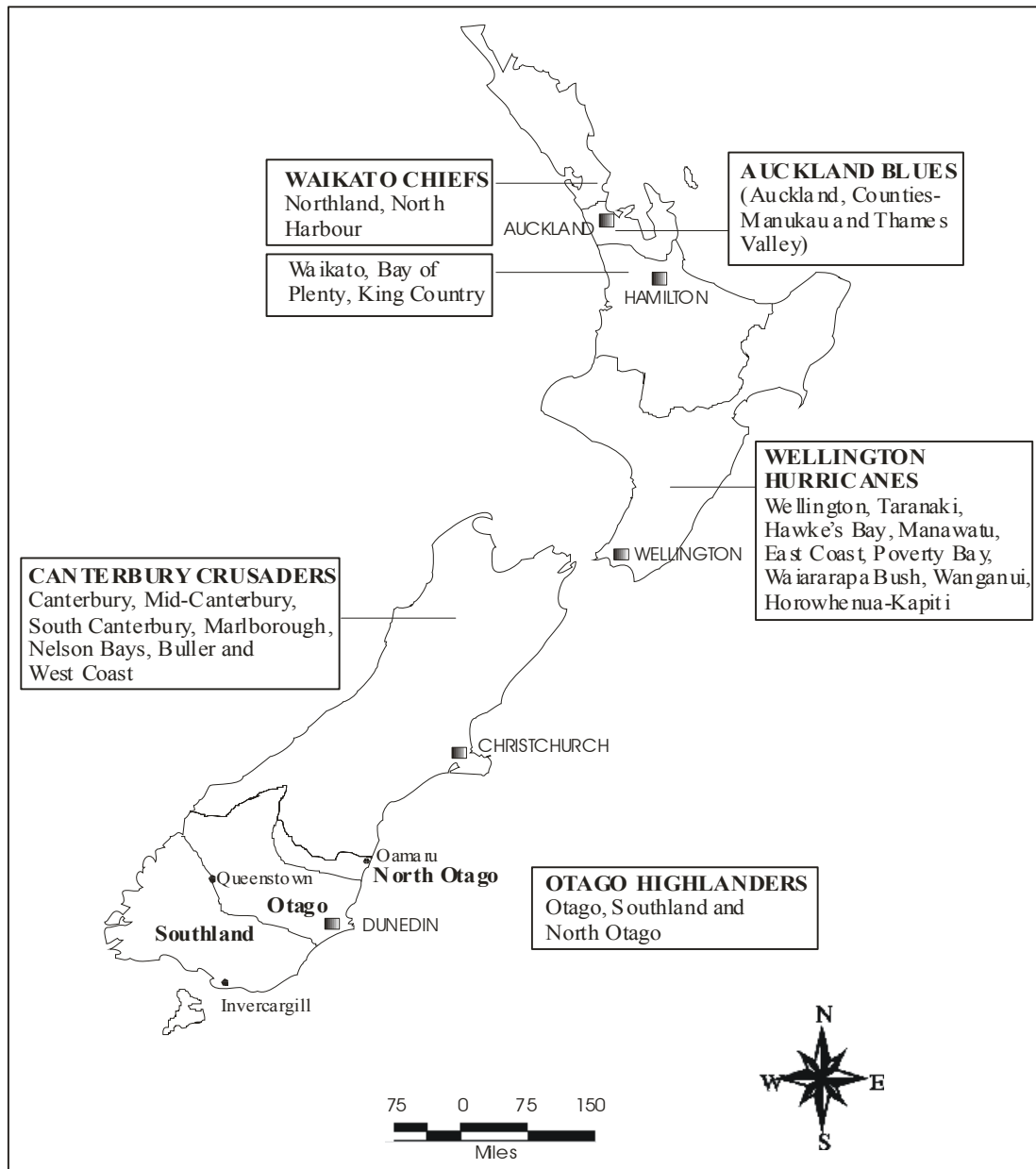
Sport dimension

Figure 2 illustrates the three defining elements of tourism (motivational, spatial and temporal) as they apply to sport. Each of these elements or dimensions has been broken down into three thematic areas. The first dimension provides a unique focus on sport as a tourist attraction. Under the first theme, individual sports are characterised by their own *rule structure*. The propensity of people to travel to attend a sporting occasion may be moderated to some degree by rule changes (e.g., an increase in its spectator appeal). *Competition* forms a second theme within the sport dimension. The level or type of competition associated with a particular sport may influence the nature of the travel experience or the propensity for people to travel (i.e., international competition generally attracts wider public attention than domestic or local). The concept of *play* represents the third thematic area represented within the sport dimension of the research framework (labelled *Ludic* on Figure 2, from the Latin word meaning play). The relationship between the concepts of play and tourist attraction involve the uncertainty of outcome (e.g., a renewable tourist attraction), commodification (i.e., making sport a commodity for spectators) and professionalism (e.g., public access to players).

Spatial dimension

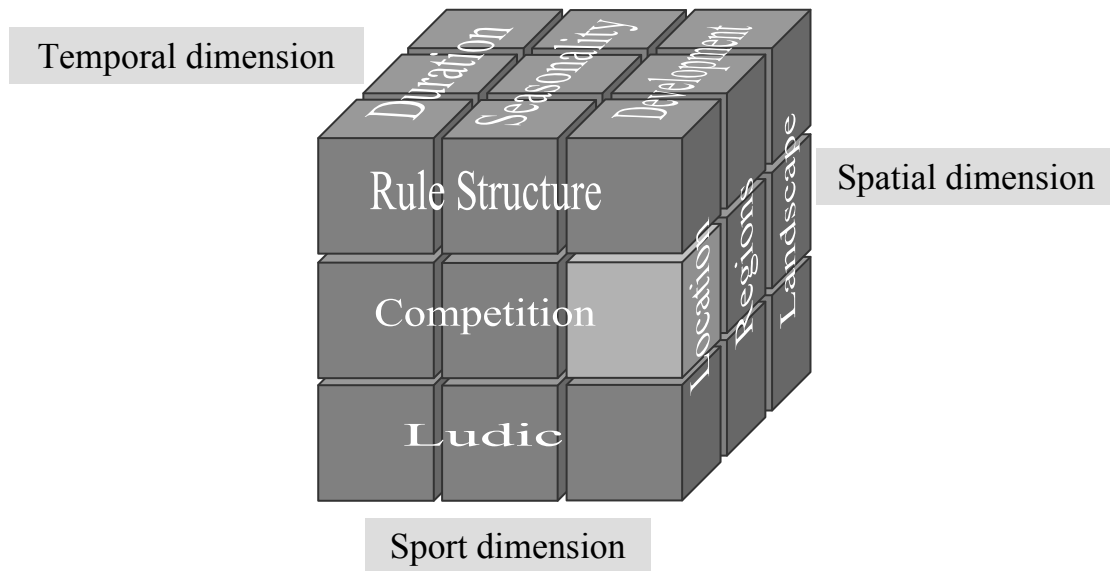
The spatial dimension comprises the themes location, region and landscape (Figure 2). Travel patterns concern the movements of visitors and are an important part of the threshold levels associated with franchise *location*. Regional identity represents a second theme within the spatial dimension. The *regional* theme considers the influence of a sport, team, or an individual athlete on the image of a destination. Little is known about the role of sporting

Figure 1.
New Zealand's Super 12 franchises and constituent provinces (1996)



■ Indicates Rugby Super 12 franchise headquarters • Indicates Highlanders second tier host centers

Figure 2.
Framework for Sport Tourism Research



teams in creating regional imagery and its contribution to regional differentiation. The third theme identified within the spatial dimension of the framework concerns *landscape*. Sports may impact on a tourism landscape in terms of its social, cultural and physical dimensions. Change related to any of these themes may moderate the propensity for people to travel to be in attendance at sporting occasions.

Temporal dimension

Finally, three themes have also been explored within the temporal dimension of the framework (Figure 2), the first of which is trip *duration*. This trip characteristic holds significance in terms of the economic impact associated with a visit and the extension of sport motivated trips into other types of tourist activity at the destination. Tourism *seasonality* represents a second theme within the temporal dimension. This theme raises questions relating to the relationship between sporting and tourist seasons. The third temporal theme in the framework concerns the *development* or evolution of tourism products and destinations over time. Sport can assume an important role as a region matures as a tourist destination.

This research framework facilitates a close examination of the relationship between sport and tourism. It facilitates specific consideration of the impacts of changes in the sport dimension on the other dimensions of tourism. It is then possible to research the broader ramifications of change for tourism in both the spatial and temporal dimensions.

3.2 Study area

This study employs the sport tourism research framework (Hinch and Higham 1999), outlined above, in order to research changes within the spatial and temporal dimensions of tourism resulting from professional Super 12 rugby. Five regional franchises exist in New Zealand; the Auckland Blues, Waikato Chiefs, Wellington Hurricanes, Canterbury Crusaders and Otago Highlanders. This study focuses on the Otago Highlanders region, the southern-most of the five franchises. The Highlanders franchise region includes the provinces of North Otago, Otago and Southland with the franchise headquarters situated in Dunedin, Otago (Figure 1). The secondary location within the region is Invercargill, Southland. Queenstown and Oamaru represent third tier Super 12 centres as they have hosted pre-season (warm-up) fixtures in preparation for the regular season.

3.3 Methodology

In order to achieve an insight into the impacts on tourism of Super 12 within the Highlanders region, a qualitative research methodology was adopted. Semi-structured interviews were conducted with rugby administrators in each of the three member unions within the franchise area (North Otago, Otago and Southland). Economic development staff and Regional Tourism Organisation staff at Local Government offices (Tourism Waitaki, Dunedin City Council and Invercargill City Council) were also interviewed in order to gain insight on the tourism potential that Super 12 offers. A combined total of eleven interviewees were selected from these organisations. The interviews ranged in duration from 25-75 minutes and were tape recorded and subsequently transcribed. Data analysis involved the identification of emergent themes within the context of the sport, spatial and temporal dimensions of the sport tourism research framework.

4. The Sport Dimension as an Agent for Change

The development of Super 12 has generated much change in the sport dimension of the research framework. Each of the three themes illustrated on the sport dimension have been extensively modified in the process of creating a professional Rugby Union competition (Table 1). The *rule structure* of Super 12, for example, has been altered with the stated aim of promoting the spectacle of rugby. The consequence has been the adoption of a faster style of rugby, a move encouraged by new substitution rules and an extended half-time interval for Super 12. New lineout rules have eliminated much of the territorial advantages traditionally associated with kicking the ball and, therefore, promoted the importance of maintaining possession. Restart and dead ball rules have also been introduced to maximise 'ball in play' time during the 80 minutes of the match. These rule changes have been embraced by professional referees who, under the directions of SANZAR, have been instructed to promote open play particularly through the application of the advantage rule¹. Greater communication with players has allowed referees to warn players (who are possibly unaware of their indiscretion) rather than penalising immediately. The overall effect has been to reward and, therefore, promote skillful running play.

¹ The Advantage Rule allows referees to acknowledge a player/team offense that will be penalised, while allowing the opposition (in possession of the ball) a short period of advantage. This provides an opportunity for the team in possession to attempt a passage of play that will benefit them more than the original penalty. If no advantage arises then the penalty will result. This rule encourages attacking play while advantage is being signaled and discourages offending that will result in a penalty being awarded.

The nature of provincial rugby *competition* has also changed through the development of Super 12. Teams earn four competition points for winning, but they also earn bonus points by (a) scoring four or more tries during the game and/or (b) by losing by a margin of seven points or less. The result has, once again, been to promote an open and attacking style of play. Bonus points have, in some cases, allowed teams to qualify for the semi-finals over rival teams who have recorded more wins, but failed to gain bonus points. This is the ultimate reward for attacking play and a fact that has effectively changed the skill set required of players at this level. This also ensures that teams still have plenty to play for in the last quarter of a game even if the overall result is beyond doubt. The outcome appears to be a new rugby philosophy for many teams in which risk taking and flair have been promoted over conservative styles of play. The international nature of Super 12 is also an important development in professional rugby as it has widened the appeal of elite rugby. Other competition developments include the creation of regional teams, the implementation of a player draft system (to ensure that only the most skilled players are involved in Super 12), the introduction of a rigid disciplinary system and putting a live microphone on referees and touch judges so that their comments become part of the Super 12 television broadcasts.

The characteristics of *play* associated with rugby have also changed dramatically with the advent of Super 12. While the essential elements of play remain, the players involved are no longer amateurs but are professionals who are contracted to Super 12 over the months of February – May (inclusive) and paid accordingly. This professionalisation represents an intriguing junction for the concepts of work and leisure or business and play which are generally considered to exist in distinction to each other (Loy et al., 1989). As part of their professional obligations, the players are also contracted to undertake fitness training

Table 1 Changes to the sport dimension of professional Super 12 Rugby Union.

Rule structure
<ol style="list-style-type: none"> 1. New rules to promote ‘ball in play’ time (eg., dead ball and restart rules). 2. New rules to encourage attacking play and the maintenance of possession (eg., lineout rules). 3. New rules designed to speed up play (eg., substitution rules and extend half time breaks). 4. SANZAR directive on the interpretation of rules to minimise stoppages of play (eg., the application of the advantage rule). 5. Disciplinary rules introduced to outlaw the illegal prevention of tried being scored (eg., sin bin and yellow card system).
Competition
<ol style="list-style-type: none"> 1. Amalgamation of twenty-seven provincial teams into five regional franchises. 2. Creation of regional team identified to assist in the promotion of Super 12. 3. The involvement of international rather than domestic teams. 4. Competition points system developed to reward try scoring and guarantee 80 minutes of intense play. 5. Promote fair and spectacular play (eg., professional referees and touch judges and neutral referees). 6. Development of a judicial system designed to reduce foul play. 7. The scheduling of pre-season warm-up games to ensure a high level of early season performance. 8. The entertainment packaging of Super 12 to act as a vehicle for its branding and promotion. 9. Drafting rules introduced to ensure that only the most talented players are selected to play Super 12.
Nature of Play
<ol style="list-style-type: none"> 1. Professional players with greater attention paid to fitness, skill base and match preparation. 2. Professional management teams travelling in association with players. 3. Enhanced public liaison through school visits, advertising, competitions and arrangements for young fans and disabled children to meet the players. 4. Creation of five franchise headquarters each representing professional regional teams. 5. Required standard of stadium facilities to act as headquarters for a Super 12 franchise. SANZAR/NZRFU have power to revoke or modify franchise status. 6. Need for floodlighting, seating capacity and television production facilities to host professional, globally televised sport.

(December - January), preseason matches (January - February), public liaison, school visits and promotional commitments. School children have greater access to players and the public image of rugby and rugby players has changed commensurate with the professionalisation of the code. These changes have increased the profile of rugby, widened its spectator appeal and made it far more competitive in terms of the discretionary leisure dollar. The ramifications of these changes for the spatial and temporal dimensions of tourism in the region will be explored in the following sections.

5. Impacts on the Spatial Dimension of Tourism

Study respondents felt that the three spatial themes of tourism as manifest in this region have been moderated by the advent of Super 12 (Table 2). These themes relate to travel patterns, regional identity and the tourism landscape.

5.1 Travel patterns

Super 12 appears to have influenced patterns of travel associated with franchise regions and Super 12 host cities as destinations. Respondents agreed that the creation of Super 12 teams has extended distance decay travel patterns associated with rugby spectatorship. The high

calibre of play and improved entertainment value has encouraged people to travel further afield to watch rugby. The North Otago Rugby Union suggested that *"an astronomical number of people make the trip to Dunedin to watch the Highlanders in the Super 12, [even though they don't necessarily] come to watch a local game of rugby"*. Rather than substituting Highlander games for local games, it appears that new markets for rugby spectatorship have been created. The tourism benefits for host locations extends beyond the confines of the gate revenues at the stadium. Hosting destinations also benefit from the secondary travel motivations of the 'new rugby markets'. *"A lot of people travel, particularly to Dunedin, do a bit of shopping, or, if they have relatives, stay with them... it is a big family day out and sometimes they make a whole weekend of it"* (North Otago Rugby Union).

Table 2 Changes to the spatial dimensions of tourism in the Highlanders Super 12 franchise region.

Travel patterns
<ol style="list-style-type: none"> 1. Extension of travel distances to support Super 12 teams (across rival provinces that now fall within the same Super 12 region). 2. Creation of new rugby spectator markets travelling to Super 12 cities to watch rugby. 3. Designation of five Super 12 franchise headquarters which are central locations for travel flows. 4. Development of secondary locations competing to host pre-season warm-up matches. 5. Potential to redistribute international travel flows within southern New Zealand into host cities. 6. New spatial tourism patterns associated with the movement of fans into the central location to support their team (from pre-Super 12 rival provinces). 7. Significant spatial movement into the central location associated with the status of professional teams as groups of tourists
Regional identity
<ol style="list-style-type: none"> 1. Creates a regional differentiation of the New Zealand tourism product in the minds of domestic and international travellers. 2. Carisbrook has become an icon for southern New Zealand with implications for the movement of travellers in the southern macro region 3. Greater international traveller awareness of distinct regional identities, values and lifestyles, history and heritage. 4. Distinct regional travel patterns associated with the creation of new groups of travellers (rugby is less likely to be the sole travel motivation). Greater spatial movement of women and families across the region to watch rugby. 5. Promotion of urban tourism destination status for franchise headquarters 6. Television promotion of tourist attractions and activities within the region (packaging of sport for a television audience) 7. Regional educational facilities promoted through the imagery associated with elements of the Highlanders support base and their association with sections of the stadium. 8. Break down of provincial parochialism within the franchise
Tourism landscape
<ol style="list-style-type: none"> 1. <i>Physical</i>: Development of locations such as Carisbrook (Dunedin), Homestead Stadium (Invercargill) and Centennial Park (Oamaru) will have implications for the sport tourism landscape within the region. 2. Improved spectator experience through the development of safer, cleaner facilities and enhanced viewing experience with implications for perceptions of the sport landscape. 3. <i>Social</i>: Development of night sport and associated entertainment packaging has transformed the social landscape Super 12 has become a social as well as a sporting occasion. 4. <i>Cultural</i>: The image associated with rugby has changed from one of brute strength and aggression to speed, skill and tactics with implications for the cultural landscape

The drawing power of Super 12 in terms of its potential to generate tourism flows is confirmed by research conducted by the Invercargill City Council (Economic Development Unit). A comparison of visitor surveys conducted at two rugby games in Invercargill, one Super 12 (regional) and the other an National Provincial Championship (NPC) fixture, indicates that the former attracts more spectators from outside the region and from further afield. The Super 12 fixture attracted over one-third of its spectators (36%) from outside Invercargill. By comparison, the Southland versus Auckland NPC match received 16% of spectators from outside the host city (Table 3). This research also confirmed that visitors attracted to the city to attend rugby matches travel further to attend Super 12 games (Table 3). Host cities, therefore, have become a focus for spectator travel flows throughout the region, as well as the professional athletes, team management, television and media personnel and others associated with the staging of Super 12 games.

Table 3. Comparison of the origins of visitors to Homestead Stadium, Invercargill for Super 12 and NPC matches (%)

Fixture	Visitors to Invercargill	Origins of visitors to Invercargill			
		Rural Southland	Otago and other South Island	North Island	Overseas tourists
Highlanders Super 12 vs Golden Cats	36%	66.7%	24.4%	3.4%	5.5%
Southland NPC vs Auckland	16%	82.3%	13.3%	2.7%	1.7%

Source: Invercargill City Council (Economic Development Unit) 1998.

It was also suggested that cities hosting Super 12 games in the second half of the regular season benefit additionally from the increased likelihood of inter-regional tourism associated with the Super 12 competition. Teams that may qualify for the semi-final play-offs generally receive a groundswell of support due to their success. The nature of the Super 12 competition (i.e., the involvement of teams from three different countries) results in expanding bodies of support from outside the franchise region as the competition moves towards the play-offs. In the case of the Highlanders, *"Carisbrook gets such good numbers of people into the ground because it attracts spectators from the wider region... and from one region to another as you get through towards the end of the season"* (North Otago Rugby Union). Both Rugby Union and Tourism Development staff in Oamaru reported substantial travel flows through Oamaru and into Dunedin from as far north as Christchurch (part of the rival Canterbury Crusaders franchise region) during the 1998 Super 12 season.

Indeed Tourism Dunedin and the Economic Development Unit (Dunedin City Council) speculated on the potential for Super 12 to redistribute international visitors in Southern New Zealand. They felt that Super 12 in itself is perhaps insufficient to attract international tourists but may act as a secondary motivation to travel. If this is the case, the consequences

may include some modification of the spatial aspects of the visitor's travel itinerary while in New Zealand so that a Super 12 game is included. Super 12 may, therefore, function as an important secondary motivation that acts to "tip the scales" during the travel and destination decision-making processes. Australians may visit Queenstown, for example, not only because of its immediate attractions but also because they can travel to Invercargill or Dunedin to see an Australian team playing the Otago Highlanders. Not only may this influence their choice of destination but it may extend their stay.

These tourism benefits were seen as extending to secondary and third tier locations. Interviews revealed that *"some people travel to every single game... even the pre-season games in places such as Queenstown"* (North Otago Rugby Union). The Super 12, therefore, raises the opportunity for competition between primary, secondary and third tier centres within the region to host Super 12 matches and harness the tourism potential that they offer. This has certainly been recognised by the North Otago Rugby Union which has succeeded in hosting one pre-season match involving the Otago Highlanders in both 1998 and 1999. *"On February 14, 1999, against the ACT Brumbies, we're expecting the crowd to be bulging at the seams... there are a few [stadium] alterations going on at present with a view to that"* (North Otago Rugby Union 1998).

5.2 Regional identity

The second theme in the spatial dimension (Figure 1) is most directly related to regional identity in a tourism context. In discussing this possibility, interviewees were in agreement that the Highlanders brand does function in this way. The development of the Highlanders' brand has been effective in creating a distinct regional image that operates in international as well as domestic travel markets.

"The Highlanders brand reflects the terrain, the Scottish heritage and the values of the region: honesty, integrity and hard work...it is very much reflective of what we are all about" (Otago Rugby Football Union 1998). This, according to the Dunedin City Council (Economic Development Unit) *"translates into actual value for tourism"*. The branding of the Highlanders has developed as a vehicle for regional tourism differentiation and the promotion of a regional tourism product. This regional brand is also recognised by the media, such as the journalist who wrote that *"towns and regions are identifying with their team...as an expression of the town's own brand identity"* (Laidlaw 1998).

Study respondents reported that the Highlanders had created a greater traveller awareness of the distinct regional identities, values and lifestyles, history and heritage of Southern New Zealand. This contribution to image occurred at a variety of levels. First it promoted awareness of the tourism resources of the southern macro-region. More fundamentally, however, it contributed to regional differentiation of the New Zealand tourism product thereby offering attractive opportunities for effective tourism promotional strategies. The contribution of Super 12 to a positive urban destination image also operates in this manner. Indeed several interviewees identified the mutually beneficial link between Otago Rugby and tertiary educational institutions within Dunedin.

To date several New Zealand Super 12 teams have abandoned their original provincial titles (eg., the Waikato and Auckland titles have been dropped by the Chiefs and the Blues respectively). If the Highlanders are to operate as an avenue of regional differentiation for tourism purposes, it is important that it remains the *Otago Highlanders* in order to cement the

link between Otago and the Highlanders team/identity and maximise its utility in terms of tourism destination imagery.

5.3 Tourism Landscape

The last spatial theme to be considered involves the impacts on the tourism landscape. This theme highlights aspects of change to the tourism landscape arising from the development of sport. In the case of the Super 12, three fundamental aspects of change to the landscape were identified through data collection. First, the physical landscape, and tourist perceptions of it, have changed with the advent of Super 12. The sporting resources of the Highlanders region have traditionally centred on the alpine region of Central Otago and the international tourist resort of Queenstown. These resources focus upon skiing during the winter and extend to adventure activities associated with mountain, lake and river resources throughout the year. The unbalanced distribution of natural resources for sport within the Highlanders franchise area has been redressed to some degree by the construction of “built” sporting venues in the coastal region. The location of a Super 12 franchise in this part of New Zealand has resulted in further development of Carisbrook to meet international standards. The potential tourism benefits of Super 12 have also acted to stimulate stadium development in secondary and third tier centres such as Invercargill (Homestead Stadium) and Oamaru (Centennial Park). These developments have brought significant physical change to the sporting landscape in the southern macro-region.

The landscape theme also extends to the cultural and social landscapes. Cultural landscapes are characterised by the change that Super 12 has heralded for the rugby culture of New Zealand. For over a century, rugby union has been male dominated. Literary (Macdonald 1996) and photographic (Bush 1997) contributions on this subject record the minor role that women played in this sport throughout all but the last years of the twentieth century. The advent of Super 12 has coincided with and perhaps contributed to cultural change. Female involvement in rugby, which once involved little more than washing players’ uniforms, now extends to playing, coaching, managing as well as spectating. A clear link between the physical and cultural aspects of this theme is apparent. The Otago Rugby Football Union (1998) feels that “*the redevelopment of stadium facilities has really facilitated the family and the female involvement*”.

Social landscapes are defined by the social linkages between players and public which provides another aspect of change arising from the introduction of Super 12. Changes to the social landscape have taken place at two levels. First, rugby has been largely transformed from a purely sporting occasion to an entertainment spectacle. While the essence of Super 12 competition remains a sporting occasion, it has also become a social experience as fostered by the associated entertainment packages. This point is borne out by the following comment from the Otago Rugby Football Union (1998) that “*the product is still rugby but the extra 6000 spectators are coming to see the fireworks and the bands and the hoopla*”. A preponderance of young people in certain sections of the ground, such as the terraces at Carisbrook, has been a feature of Super 12 rugby. For these people, Super 12 rugby appears to have become an increasingly important feature of the social landscape.

The second level of change within this social landscape has resulted in a new philosophy regarding the links between players and public. Supporters of the team feel a strong bond with the players. Indeed ‘ownership’ of the team, in much the same way as it is described by Hornby (1992) in reference to England Premier Football fan support, has become a valued

feature of Super 12. The North Otago Rugby Union (1998) recognises this point by commenting that “*our plans are to have the Highlanders here [Oamaru] for a 2-3 day camp, to be available to the town itself, the people and the schools*”. The combination of a changing physical, cultural, and social landscape presents an increasingly unique and attractive tourism landscape for the visitors. By identifying these changes, the tourism industry can benefit by incorporating them into tourism development strategies.

6. Impacts on the Temporal Dimension of Tourism

The responses of interviewees confirmed that various elements of change have also occurred in the temporal dimension (Table 4). These impacts are best described in the context of visitor length of stay, seasonal variation in tourist flows, and the long term evolution of both sport and tourism within the destination region.

Table 4. Changes to the temporal dimensions of tourism in the Highlanders Super 12 franchise region.

Length of stay
<ol style="list-style-type: none"> 1. Total duration of entertainment has extended due to the packaging of Super 12 and extended half time breaks. In most cases spectators now spend approximately twice as long at the venue as previously. 2. The packaging of Super 12 has resulted in changes to pre-match travel times for Super 12 matches (typically concerts and fireworks displays take place before kick-off) 3. Evening entertainments associated with Super 12 encourage visitors to stay longer after the matches with implications for post-match travel itineraries. 4. Scheduling of evening games coincides with blocks of leisure time. Competes less with other activities (eg., family activities) and coincides with discretionary leisure time. Super 12 is more likely to be linked with other leisure activities (eg., dining out, socialising)
Seasonal visitation
<ol style="list-style-type: none"> 1. Scheduling of Super 12 at the start of the rugby calendar has extended the rugby season from winter into late summer and autumn. This has effectively extended seasonal patterns of visitation to host cities into the tourist shoulder season. 2. Trip frequency has increased (visitors are travelling more often rather than time switching). 3. New rugby markets travel with a new range of secondary travel motivations. These people are more likely to engage in shopping and dining out than traditional rugby markets. Seasonal benefits extend into the retail sector and others. 4. The redevelopment of sporting facilities at the franchise headquarters allows the hosting of other sporting codes (eg., Youth World Cup Soccer, International Rugby League) in the shoulder seasons.
Long term development of tourism
<ol style="list-style-type: none"> 1. Super 12 has influenced the development of Dunedin’s urban tourism image. It plays an important contemporary part of the continual evolution of urban imagery. 2. Super 12 represents a development for the promotion of tourism in Dunedin and Southern New Zealand (lifestyles, heritage values, tourist attractions and activities, University images carried in coverage of Super 12 from Carisbrook) 3. Greater integration of sport and tourism products. New rugby travel markets are more likely to visit host cities for reasons in addition to rugby (eg., families travelling with young children). 4. The extension of distance-decay travel patterns with temporal changes associated with greater travelling distances. 5. Greater likelihood that travelling spectators will stay overnight after Super 12 games. Upward of seventy percent of Super 12 games are played under lights (finishing after 9.00pm).

6.1 Length of stay

Super 12 has become ‘packaged’ with pre-match (concerts, firework displays), half-time (competitions and music) and post-match (meeting players, pre-recorded music) entertainments and activities which encourage spectators to arrive earlier and remain at the ground longer. Evening entertainment and activities are also more likely to be associated with Super 12 throughout Dunedin due in large part to the late-summer/autumn scheduling of the competition. Beach parties, boot parties, barbeques, pub entertainments and various other activities are typically associated with Super 12. These opportunities are also due to the scheduling of games to coincide with significant blocks of leisure time (Friday nights, Saturday and Sunday afternoons and evenings). The consequence has been that spectators spend more time at the venue and are more likely to link rugby spectatorship to other leisure (eg., dining and socialising) activities. *“The timing of matches is quite interesting. Where you have got a Friday night match, that impacts on travel patterns and length of stay, particularly with the added attraction of entertainment beforehand”* (Tourism Dunedin 1998).

6.2 Seasonal visitation

Changes to the rugby product have held significant implications for *seasonal* travel patterns in the franchise region. The inclusion of the Super 12 at the start of the rugby calendar effectively extends the rugby season into late-summer and autumn. This scheduling has contributed to the extension of the tourist high season into autumn. The spectacle of Super 12 has also been enhanced by this seasonal shift. It is more likely to be played in warm conditions on a hard, fast playing surface with a dry ball. Atmosphere and spectacle are fostered thereby attracting the attention of ‘new’ rugby watchers and encouraging others to travel further to attend games. Super 12 has, therefore, been effective in generating domestic tourism in the autumn quarter. *“A good percentage of them [visiting rugby spectators] stay and make a weekend out of it... by the time a night game has finished it is a pretty long haul home”* (Southland Rugby Football Union 1998). In these instances, according to the North Otago Rugby Union (1998), travellers are not time-switching, but rather travelling further and more frequently, specifically to attend Super 12 games. The benefits of this mix (wider travel region, new markets and greater frequency of travel) extends to the retail sector, food and beverage providers and tourism operators.

The development of multi-use stadium facilities at the Highlander’s franchise headquarters (Carisbrook, Dunedin) may make a potentially significant contribution to mitigating seasonality in the local tourism sector. Recent facility developments allow the Otago Rugby Football Union to bid for international rugby fixtures for which they were previously ineligible or uncompetitive. Such fixtures have the potential to generate commercial accommodation occupancy rates on par with those usually associated with the high season (90-100%) rather than the typical winter occupancy rates (25-35%) (Higham 1997). Carisbrook also has the seating capacity to successfully bid for a variety of other international competitions and events. Facility developments are also taking place at Centennial Park (Oamaru) in order to attract pre-season games and harness their tourism potential (North Otago Rugby Union 1998).

6.3 Long term development of tourism

The cumulative effects of the impacts of the Super 12 franchise in southern New Zealand will effect tourism development in the long term as well as the short term. Increased visitation and length of stay, directly or indirectly attributed to the existence of the Highlanders in the region, will filter through to other parts of the tourism system such as the accommodation and food & beverage sectors. As the tourism system evolves it will also influence the continued development of the Super 12 franchise within the region and by association, across the full league. For example, a healthy tourism industry may contribute toward the critical mass needed to support a professional sport franchise in this region. Similarly, the unique needs of visiting spectators (inclusive of those cheering for the home team as well as those supporting the visiting team) may influence further modifications to the nature of the competition itself. The relationship between rugby and tourism is therefore one of mutual influence.

One of the most powerful potential impacts of the Super 12 competition on tourism within the region is the exposure it provides for the region as a tourism destination. The major agent for the exposure is the television broadcast of home games and the association of this region with the performance of the Highlanders and their star players. It is widely recognised that “[t]he nature of the coverage generally incorporates some city promotion, showing the city in a positive light” (Dunedin City Council EDU 1998). These positive messages apply not only to specific tourism attractions, but also to lifestyles, values, heritage and, in the case of Dunedin, tertiary education sector.

Similarly, the home stadium of the Highlanders is increasingly serving as an icon for the region. “*Carisbrook is one of the most identifiable things in Dunedin; it is our equivalent of the Sydney Opera House*” (Otago Rugby Football Union 1998). In this regard, Super 12 has been a vehicle for promoting Dunedin’s urban destination status. This operates in two ways. First, the televising of Super 12 games from Carisbrook, particularly night games, presents Dunedin as an exciting and attractive city to visit. Secondly, Dunedin’s status as a vibrant urban destination is enhanced by its association with the Highlanders. Essentially, Super 12 offers Dunedin the opportunity to “rub shoulders” and be associated with the major urban tourism destinations in the Southern Hemisphere (eg., Durban, Johannesburg, Sydney, Brisbane, Auckland) in the eyes of a global television audience. It is also noteworthy that many of the rugby watching nations of the world (eg., in Europe and Asia, Australia and west coast North America) are also important inbound tourism markets for New Zealand. These aspects of Super 12 may not have an immediate impact on the tourism industry but in the context of the long term development of the industry, the potential they offer is likely to be significant.

7. Conclusions

Much debate surrounds the changes to New Zealand rugby since the advent of professionalism in 1995. However, there is little doubt that the Super 12 has been a success in terms of spectatorship, at least in the context of the Highlanders franchise in southern New Zealand. Media reports confirm the perception that the “*spectator catchment has widened*” (Laidlaw 1998) as a result of the colour and drama of professional rugby.

This report has explored the impacts of the Highlanders’ Super 12 franchise within the spatial and temporal dimensions of tourism. Data analysis supports the assertion that Super 12 has

positively affected tourism in these areas. Within the spatial dimension the extension of travel patterns and the creation of new travel markets associated with rugby spectatorship has been especially important. Super 12 has acted as a vehicle for regional image enhancement and promotion. Changes to the sporting landscape have also enhanced the tourism landscape throughout the region.

From a temporal perspective, increased length of stay and seasonal tourist activity during the traditionally quiet Autumn period are two of the key impacts. Similarly, in the long term, Dunedin's urban destination image and regional tourism promotion opportunities will be significantly influenced by the Highlanders. The evolution of the broader region as a tourism destination is also anticipated to have a positive impact on the Highlanders franchise itself. This reciprocal relationship is likely to lead to continued development to the mutual benefit of sport and tourism within the region.

While the major beneficiary in terms of tourism related to the Highlanders Super 12 franchise appears to have been Dunedin, interviews confirm that other regional centres have also benefited by identifying and pursuing the tourism opportunities related to the Highlanders (e.g., Invercargill, Oamaru, Queenstown). The findings contained in this report support the notion that the introduction of Super 12, and the creation of the Otago Highlanders, has had important and beneficial impacts on the spatial and temporal distribution of tourism in this region.

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