

# **Economic Impact Assessment Final Report**

## **Te Whare o Rehua Sarjeant Gallery Upgrade and Extension**

**February 2026**

Thomas Consulting

18 February 2026

While every effort has been made by Thomas Consulting to provide an accurate economic assessment of Te Whare o Rehua Sarjeant Gallery based on visitor numbers, construction of the extension and upgrade, and the operations of the Gallery, the data includes a number of assumptions and omissions. The following key dataset is not currently available for the Whanganui District:

1. Whanganui District Economic Input / Output model to generate more accurate local multipliers of GDP, employment and expenditure.

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## **Te Whare o Rehua Sarjeant Gallery - Upgrade and Extension**

As part of the fundraising and setting of project objectives an Economic Impact Assessment (EIA) was prepared<sup>1</sup> in February 2019. This report was part of the funding application to MBIE at that time.

Whanganui District Council and MBIE are wanting to assess the impact of the investment in the Sarjeant Gallery. As part of this assessment an update of the EIA was prepared in April 2025. This final EIA completes the assessment of economic impacts on Whanganui from the upgraded facility on Whanganui.

This EIA takes a conservative approach to assess economic impacts using visitor, visitor spending assumptions and survey data to identify the impacts from the upgraded facility. Ranges of impacts are shown that recognise the imprecise nature of assessing these impacts.

The impact of the increased visitor numbers compared to the old facility is estimated at \$22.5 million a year in additional spend in Whanganui, and 163 additional full time equivalent jobs. This reflects the proportion of those additional visitors that survey data indicated that the Sarjeant Gallery was a reason why they visited Whanganui. The significant number other additional visitors are assumed to have only a third of that daily spending impact as they are likely to have been visiting Whanganui anyway.

The full impact of the Sarjeant Gallery will include spending from all out of district visitors – not just the additional visitors from the upgrade. The full impacts of the Sarjeant Gallery to the Whanganui economy can be estimated at over \$32 million per year and 236 full time equivalent jobs.

Facilities such as the Sarjeant Gallery are part of an overall package of attractions and facilities that result in people visiting the district and possibly staying an additional night.

### Main findings

- The Sarjeant Gallery is attracting significantly more visitors than forecast in the business case – visitor numbers in the year to January 2026 have far exceeded initial forecasts at 108,954.
  - Visitor numbers are almost triple the numbers that visited the Sarjeant Gallery pre upgrade (2017/18).
  - Visitor numbers are remaining high 14 months after the opening and are forecast to settle at around 102,600 visitors a year.
  - Survey results indicate that local visitors made up 41% of all visitors, out of district domestic 40% and international 19%. International visitors far exceeded previous and forecast numbers.
  - Out of district domestic visitors stayed an average of 1.2 nights in Whanganui, with internationals staying 2.0 nights (survey results).
- 194 – 218 local jobs were generated during the construction phase based on the amount of local content businesses within the construction programme. The majority of funding was grants and fundraising (\$53.3m) with around a third from Council (\$26.1m).
  - The construction costs component of the total project was \$65.4m
  - The overall project costs including professional fees (mostly out of district), council fees, historical costs was \$79.4m.

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<sup>1</sup> 25 February 2019 – Thomas Consulting

- Employment impacts from the upgrade are estimated to be 163 full time equivalent jobs
- Ongoing employment impacts in Whanganui District from total visitor spending and new jobs at the Sarjeant Gallery are estimated at 255 full time equivalent jobs (based on 102,600 annual visitors and the proportion indicating a reason to visit Whanganui, plus staff numbers at the Sarjeant Gallery and cafe).
- Satisfaction ratings were very high with an average rating of 9 out of 10.
- Total budgeted gross revenue is \$1,043,894 for the current financial year, including shop sales, café sales, donations and events.
- Total revenue from Friends and the Trust, including visitor donations, has been \$170,016 in the year to January 2026. This revenue has been increasing in recent months.
- The facility forms an important part of the overall attractions for visitors to the district.
- Survey results indicating high numbers of international visitors to the Sarjeant Gallery are supported by an 11% increase in card spending by internationals in Whanganui District over the year to November 2025.
- The large number of domestic visitors from around New Zealand
- Further benefits and revenue can be realised with an events and conference strategy and additional donations.
- Implementing a door charge will net the Sarjeant Gallery a modest amount of net revenue, but even in an optimistic scenario around the impact on visitor numbers will result in over \$5 million in reduced visitor spending across the district. A pessimistic scenario could reduce visitor spending by over \$14 million in the first year and see local visitors dropping 30%, and out of district visitors dropping by over 50%.

**Summary of Visitor Numbers – Estimated visitors by home location and reason to visit Whanganui for the June year 2025/26.**

| <b>Visitor Numbers</b>  | No. of visitors |
|---|-----------------|
| <b>Out of district domestic visitors</b>                                    |                 |
| Base (what we would have expected pre-refurbishment)                        | 16,000          |
| Additional visitors who state Sarjeant Gallery was a reason to visit        | 17,450          |
| Additional visitors who do not state Sarjeant Gallery was a reason to visit | 7,785           |
| <b>Total out of district domestic visitors</b>                              | <b>41,235</b>   |
| <b>International visitors</b>   |                 |
| Base (what we would have expected pre-refurbishment)                        | 3,700           |
| Additional visitors who state Sarjeant Gallery was a reason to visit        | 5,532           |
| Additional visitors who do not state Sarjeant Gallery was a reason to visit | 9,855           |
| <b>Total international visitors</b>   | <b>19,087</b>   |
| <b>Local visitors</b>   |                 |
| Base (what we would have expected pre-refurbishment)                        | 18,200          |
| Additional visitors (post refurbishment)                                    | 24,116          |
| <b>Total local visitors</b>   | <b>42,316</b>   |
| <b>Total number of visitors to Sarjeant Gallery</b>                         | <b>102,638</b>  |

## Summary of Economic Impacts from the Upgrade and Total Operations

| Whanganui District Driver   | Direct Impacts    | Total Impacts (Direct plus Indirect and Induced) |
|---|-------------------|--|
| Project Cost (Construction)<br>Total project cost \$79.4m – of which direct construction was \$65.4m. Based on 40-45% local contract content excludes professional fees, consent fees, historical costs | \$26 - 29 million | \$52 - 59 million                                |
| Employment Impact (FTEs) <u>Construction (impacts during build)</u>   | 97 - 109          | 194 - 218  |

| Economic impact from Visitor Spending   | \$ Million    |                              |              |
|---|---------------|------------------------------|--------------|
|   | Direct Impact | Indirect and Induced Impacts | Total impact |
| <b>Impact from Upgrade - Additional to what was estimated pre-refurbishment</b> |               |                              |              |
| Out of District Domestic visitors   | 7.8           | 3.9                          | 11.7         |
| International   | 7.2           | 3.6                          | 10.8         |
| <b>Total additional economic impact</b>   | <b>15.0</b>   | <b>7.5</b>                   | <b>22.5</b>  |
| <b>Base economic impact (expected pre-refurbishment)</b>                        | <b>6.7</b>    | <b>3.4</b>                   | <b>10.1</b>  |
| <b>Total economic impact (base + additional visitors)</b>                       | <b>21.7</b>   | <b>10.9</b>                  | <b>32.6</b>  |
| <b>Employment Impact (FTEs)</b>   |               |                              |              |
| From additional Visitor Spend from upgrade                                      | 105           | 42                           | 147          |
| Additional direct staff FTE at Sarjeant Gallery                                 | 12            | 4                            | 16           |
| <b>Total additional FTE Impact per Year</b>                                     | <b>117</b>    | <b>46</b>                    | <b>163</b>   |
| <b>Base FTE impact (estimated pre-refurbishment)</b>                            | <b>58</b>     | <b>34</b>                    | <b>92</b>    |
| <b>Total FTE impact (base + additional visitors)</b>                            | <b>175</b>    | <b>80</b>                    | <b>255</b>   |

There were large visitor numbers during the opening three months that have since settled at a lower, but still high, numbers. The visitor numbers have continued to significantly exceed the original visitor forecasts.

A total of 108,954 visitors walked into the Sarjeant Gallery in the year ended January 2026. The visitor forecast in the 2019 EIA for the 2nd year of the new Sarjeant Gallery was 64,500. Current visitor numbers suggest a June year annual total of around 102,600 is likely.

This would be an increase of over 50% on the numbers used in the original business model. The impacts on the local economy from the visitors depends on the local, out of district domestic and international mix. A survey of visitors was conducted in late 2025 that has provided more data on this mix and shows high numbers of international visitors.

The additional visitors represent an opportunity for Whanganui to capitalise on the key attraction which is the Sarjeant Gallery. These opportunities come in three broad areas:

1. Revenue generation at the Sarjeant Gallery, including donations, events / experiences and friends of the Gallery. Events hire, add on services and personalised tours are a major opportunity.

2. Flow on opportunities for other Whanganui businesses, especially in the arts, accommodation, hospitality, tourism and recreation sectors.
3. Wider impacts from more visitors staying in District and looking for more activities to do.

The employment impact of the construction phase has been similar to the original EIA despite the larger construction amount. There was a lower proportion of Whanganui specific local content than originally estimated. It is very difficult to be precise in these numbers as contractors and suppliers have staff that live all over the region, regardless of where the company is headquartered. The main contractor (McMillan and Lockwood) was located in Palmerston North.

The proportion of Whanganui specific businesses is assessed at 36% of the construction component of the total budget (\$23.7 million of the \$65.4 million – current confirmed costs). This has been increased to 40% - 45% to reflect the number of staff at McMillan and Lockwood and other subcontractors that live in Whanganui. These numbers do not include professional fees, Council fees, historical costs etc.

## Economic Impact on Local Economy

### Construction

For the construction impact the proportion of Whanganui specific businesses is assessed at 36% of the final construction budget (\$23.7 million of the \$65.4 million of direct construction costs – out of the confirmed final cost of \$79.4 million as per report to Council July 2025). This local content number was the result of detailed assessment of all the sub-contractors locations. These numbers do not include professional fees, historical costs or Council fees.

The level of local content of 36% has been increased to a range of 40 – 45% to reflect the impact locally from McMillan and Lockwood (the lead contractor) staff that live in Whanganui. In addition, a number of out-of-town contractor teams stayed in Whanganui extensively during the construction phase. It is considered that the 40 – 45% range is a conservative proportion of local content.

Employment and income impacts from the construction phase generally only support additional jobs during the construction phase. Additional benefits can include:

- Maintaining business viability during lean times – including service industries and maintaining job numbers across the wider local economy,
- Increased technical knowledge and experience – improves local business chances of being successful in future tenders,
- New business contacts and partnerships with out of town contractors.

| Whanganui District Driver   | Direct Impacts    | Total Impacts (Direct plus Indirect and Induced) |
|---|-------------------|--|
| Project Cost (Construction)<br>Total project cost \$79.4m – of which direct construction was \$65.4m. Based on 40-45% local contract content excludes professional fees, consent fees, historical costs | \$26 - 29 million | \$52 - 59 million                                |
| Employment Impact (FTEs) <u>Construction (impacts during build)</u>   | <u>97 - 109</u>   | <u>194 - 218</u>                                 |

Note - Employment impacts – Construction 3.7 jobs per \$1 million local spend. Sourced from an average of a range of previous EIA reports and adjusted for inflation. Construction multiplier for indirect and induced impacts of 2.0.

## Visitor Numbers

Visitor numbers were very high during the opening period from November 2024 to February 2025. Visitors continued to exceed forecasts right through 2025. The interim EIA update (April 2025) forecast that visitor numbers could sit around 90,000 for the June year 2026. This is now likely to be over 100,000.

The monthly numbers are holding up well. The annual numbers are stabilising at over 100,000 as the opening months drop out. These early months saw large numbers of locals checking out the new facility. The next few months door counts will show whether numbers will fall back further.

Survey data collected from October 2025 to January 2026 from 570 visitors indicate that 41% of these visitors were locals, 40% out of district domestic and 19% internationals. A note of caution – the mix of visitors could differ between summer and winter seasons – especially the proportion of internationals.

| Month   | Monthly Visitor Count | Annual ending in Month |
|---------|-----------------------|------------------------|
| Nov-24  | 15,461                |                        |
| Dec-24  | 14,831                |                        |
| Jan-25  | 14,464                |                        |
| Feb-25  | 9,025                 |                        |
| Mar-25  | 10,713                |                        |
| Apr-25  | 9,530                 |                        |
| May-25  | 9,273                 |                        |
| Jun-25  | 10,275                |                        |
| Jul-25  | 9,399                 |                        |
| Aug-25  | 7,964                 |                        |
| Sept-25 | 10,863                |                        |
| Oct-25  | 7,947                 | 129,745                |
| Nov-25  | 6,239                 | 120,523                |
| Dec-25  | 7,847                 | 113,539                |
| Jan-26  | 9,879                 | 108,954                |

Source – Sarjeant Gallery door counter.

Overall comparing to historical numbers, the Sarjeant Gallery upgrade is attracting nearly three times the number of visitors than the old gallery, and 66% more than the 2019 business case.

| Visitor Numbers                     | Home location of Visitor |                          |               | Total Visitors |
|-------------------------------------|--------------------------|--------------------------|---------------|----------------|
|                                     | Local Whanganui          | Domestic out of district | International |                |
| 2018/19 estimate (old facility)*    | 18,200                   | 16,000                   | 3,700         | 37,900         |
| 2019 EIA forecast for new full year | 23,230                   | 33,660                   | 8,670         | 65,560         |
| 2025 EIA Update June 2026 year      |                          |                          |               | 90,000         |
| Year to January 2026                | 44,920                   | 43,773                   | 20,262        | 108,954        |
| Forecast June year 2026 (this EIA)  | 42,316                   | 41,235                   | 19,087        | 102,638        |

- \*Note this includes an estimate of the unique visitors to the Quayside temporary facility.
- Excludes on-line visitors

The proportion of local, out of district domestic and international visitors has significantly changed from the old to the new Sarjeant Gallery. In 2018/19 visitors were sometimes asked where they had travelled from and some assessment was made from those that were recorded.

The current numbers are derived from the visitor survey recently undertaken involving 570 survey responses. Visitors were randomly selected and asked if they would respond to a series of questions. The changing mix of visitors is shown in the following table.

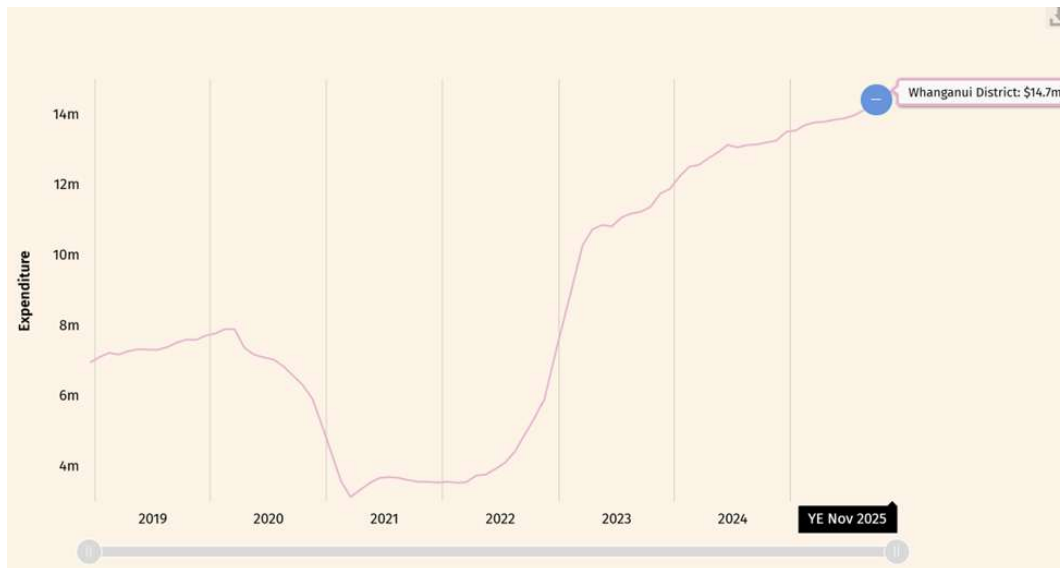
|                          | <b>Local Whanganui</b> | <b>Domestic out of district</b> | <b>International</b> |
|--------------------------|------------------------|---------------------------------|----------------------|
| 2018/19 estimate         | 48%                    | 42%                             | 10%                  |
| 2019 EIA Forecasts       | 35%                    | 51%                             | 13%                  |
| 2025/26 survey responses | 41%                    | 40%                             | 19%                  |

The increase in the proportion of international visitors is significant because these visitors tend to spend more per day (hospitality, retail shopping) and are more likely to stay in commercial accommodation.

A more detailed breakdown of the estimated visitor numbers for 2025/26 based on reason to visit and compared to the old facility (2018/19 numbers) is:

| <b>Visitor Numbers</b>  | No. of visitors |
|---|-----------------|
| <b>Out of district domestic visitors</b>                                    |                 |
| Base (what we would have expected pre-refurbishment)                        | 16,000          |
| Additional visitors who state Sarjeant Gallery was a reason to visit        | 17,450          |
| Additional visitors who do not state Sarjeant Gallery was a reason to visit | 7,785           |
| <b>Total out of district domestic visitors</b>                              | <b>41,235</b>   |
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| <b>Total international visitors</b>   | <b>19,087</b>   |
| <b>Local visitors</b>   |                 |
| Base (what we would have expected pre-refurbishment)                        | 18,200          |
| Additional visitors (post refurbishment)                                    | 24,116          |
| <b>Total local visitors</b>   | <b>42,316</b>   |
| <b>Total number of visitors to Sarjeant Gallery</b>                         | <b>102,638</b>  |

Whanganui as a destination is attracting more visitors in general and has been seeing increasing amounts of domestic and international spending.



Note – all spending on card transactions from people with overseas home address. Excludes cash and prepaid visitor activities / tours.

Data from MBIE Tourism Electronic Card Transactions (TECT) for the year ended November 2025 shows a 11% increase in international card spending in Whanganui district. This compares well on the same basis compared to Rotorua 1%, New Plymouth 12%, Auckland 8% and New Zealand overall 8%. While total international visitor numbers to New Zealand have not yet returned to pre-Covid levels, Whanganui is seeing a doubling of international visitor spending.

Domestic visitor card spending<sup>2</sup> in Whanganui for year ending November 2025 increased by 6%, significantly better than New Plymouth -8%, Auckland 0% and New Zealand -3%. The national numbers reflect a tough economic year with households facing affordability issues. Clearly Whanganui is on a bit of a roll and the Sarjeant Gallery upgrade is at least part of the underlying reasons.

Of interest is the number of school visits in the last year and whether these are driving the high number of visitors. There were 108 school visits that totalled 3,941 school visitors. Many of these will be local schools and so at most make up less than 10% of the total local visitors for the year to January 2026.

### Visitor Spending Impacts

Assessing the impacts of the new facility requires assumptions to be made as to how many of the additional visitors (compared to the old facility) have come to Whanganui because of the upgraded facility. Using the total increase in visitors implies that they were all coming to Whanganui to some degree because of the upgrade. Many out of district visitors will visit Whanganui for the overall range of attractions and as part of a much wider trip.

The economic impacts from visitors on the local economy is driven by how many live out of district, domestic NZ and international. The more visitors from out of district the larger the impact. The large number of local visitors are NOT included in the economic impact as the assumption is there is no additional spending in the local economy by them.

<sup>2</sup> Includes all card spending by people with home address >40km from the largest urban centre within a cardholder’s home TA, and all spending outside of the cardholder’s home TA. Excludes cash and prepaid visitor activities / tours.

The other major driver is how many of those out of district visitors decided to come to Whanganui because of the upgraded Sarjeant Gallery. If those extra visitors decided to visit due to other attractions / reasons then perhaps they would have come regardless of the Sarjeant Gallery upgrade.

Previous assessments have just used the total increase in visitors compared to the old facility as there was no data to make an assessment. We now have surveys (475 visitors of which 277 did not reside in Whanganui) conducted in December 2025 and January 2026 that asked those from out of the district if the Sarjeant Gallery was a reason or the main reason for the visit to Whanganui.

Although the survey showed that a large number of visitors were influenced to come to Whanganui because of the Sarjeant Gallery, for a significant proportion of visitors (31% of out of district domestic visitors and 64% of international visitors) the Sarjeant Gallery was not specifically a reason for coming to Whanganui. These people either found out about the Gallery after they arrived or came with friends and family.

This does not mean that the Sarjeant Gallery had no attributable influence on the overall visitor decision. These people actually did visit the Sarjeant Gallery, and this will contribute to the overall length of stay and spend. Visiting the Sarjeant Gallery may require another night in Whanganui, or contributed to an overall package of attractions. This likely additional impact can be included with an assumption of a reduced impact per day. As stated by BERL<sup>3</sup>

*Museums and galleries are connected to each other as well as the arts and heritage communities in their local areas. These clusters are important to maintain because visitors to a city or region are often drawn by a collective offering of activities and attractions. Additionally, when visitors are drawn to an area due to a prominent museum, exhibition or event, they will usually make the most of the other offerings nearby.*

For international visitors the question on whether the Sarjeant Gallery was a reason to visit generated many 'not at all' responses as the reason to visit Whanganui. This is not surprising as not many international visitors would have come to New Zealand solely because of the Sarjeant Gallery. Future surveys will need to ask more questions to gain more insights into why they visited / stayed in Whanganui as part of a wider visit to New Zealand.

The true spending and employment impact from the upgrade from out of district visitors therefore probably lies somewhere between the total number of additional visitors and the numbers based the survey proportion that said the Sarjeant Gallery was a reason or the main reason for visiting Whanganui.

In order to quantify the impacts an assumption is made that these additional visitors have an impact of around a third of those that stated that the Sarjeant Gallery was a reason to visit. The impacts are strongly positive for the district.

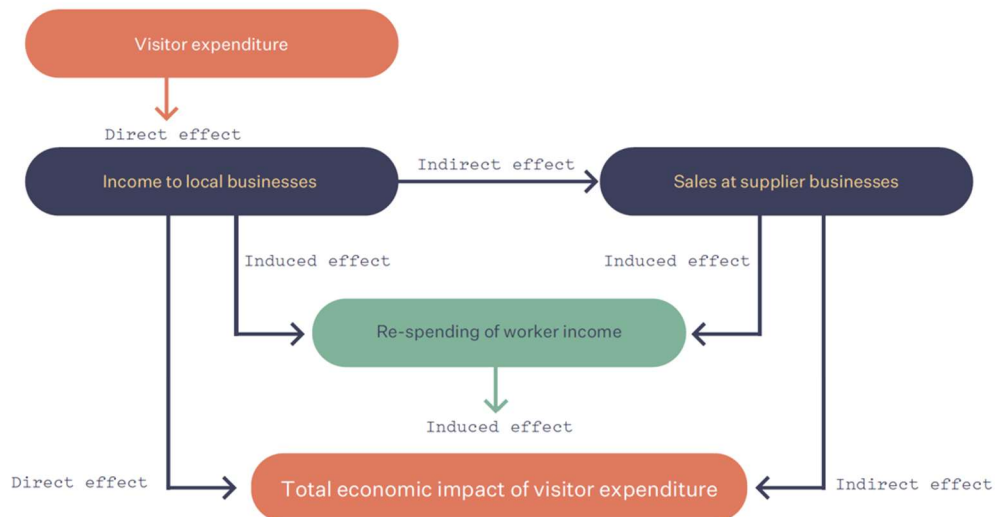
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<sup>3</sup> The Economic Impact of Museums and Galleries on Regional Clusters - 2024 Museums Aotearoa.

| Economic impact from Visitor Spending   | \$ Million    |                              |              |
|---|---------------|------------------------------|--------------|
|   | Direct Impact | Indirect and Induced Impacts | Total impact |
| <b>Impact from Upgrade - Additional to what was estimated pre-refurbishment</b> |               |                              |              |
| Out of District Domestic visitors   | 7.8           | 3.9                          | 11.7         |
| International   | 7.2           | 3.6                          | 10.8         |
| <b>Total additional economic impact</b>   | <b>15.0</b>   | <b>7.5</b>                   | <b>22.5</b>  |
|   |               |                              |              |
| <b>Base economic impact (expected pre-refurbishment)</b>                        | <b>6.7</b>    | <b>3.4</b>                   | <b>10.1</b>  |
|   |               |                              |              |
| <b>Total economic impact (base + additional visitors)</b>                       | <b>21.7</b>   | <b>10.9</b>                  | <b>32.6</b>  |
|   |               |                              |              |
| <b>Employment Impact (FTEs)</b>   |               |                              |              |
| From additional Visitor Spend from upgrade                                      | 105           | 42                           | 147          |
| Additional direct staff FTE at Sarjeant Gallery                                 | 12            | 4                            | 16           |
| <b>Total additional FTE Impact per Year</b>                                     | <b>117</b>    | <b>46</b>                    | <b>163</b>   |
| <b>Base FTE impact (estimated pre-refurbishment)</b>                            | <b>58</b>     | <b>34</b>                    | <b>92</b>    |
| <b>Total FTE impact (base + additional visitors)</b>                            | <b>175</b>    | <b>80</b>                    | <b>255</b>   |

- The above numbers are based on the latest visitor number trends to January 2026, reduced for the June year 2026 to reflect the higher opening numbers in the first few months of operations.
- Spending per day numbers
  - International \$329 per day sourced from MBIE International Visitor Survey Sept Qtr 2025 Median.
  - Domestic \$195 per day source - Understanding how visitors contribute to New Zealand's wellbeing, Fresh Info (NZ Tourism) \$155 per day in 2019 inflated by CPI – reflects higher proportions staying with friends and family (so lower per day spend).
- Number of days – sourced from visitor surveys December 2025 and January 2026 Sarjeant Gallery. Domestic 2 days and International 2.5 days on average.
  - Note this is a conservative assumption counting responses of 3+ nights as 4 nights only. Previous surveys have indicated some visitors stay much longer than 3 nights.
- Employment impacts – Construction 3.7 jobs per \$1 million local spend. Visitor spending 7 jobs per \$ million based on Stats NZ Tourism accounts and BERL - *The economic impact of the Govett-Brewster Art Gallery / Len Lye Centre – August 2025*.

The economic impacts include both direct, indirect and induced impacts as spending by additional visitors from out of the district filter through the local economy. How this works is shown in the figure below from a recent report in a comparative museum / gallery facility in New Plymouth - *BERL The economic impact of the Govett-Brewster Art Gallery / Len Lye Centre – August 2025*.



Source: BERL

Visitor spending in the District is driven by the length of time visitors stay as a result of visiting the upgraded Sarjeant Gallery, and who otherwise would not have visited or stayed if the gallery had not been there. Visitors can stay for multiple nights as a result of other recreational, shopping and cultural attractions. This spending multiplies as these businesses spend more money on supplies to service the additional visitors indirectly. From both the direct and indirect impacts, workers receive income, which they continue to spend in the economy.

It is difficult to attribute what would have occurred if the Sarjeant Gallery upgrade had not occurred. Certainly, the media publicity related to the new facility has resulted in more awareness of Whanganui as a destination. Visitors spend on accommodation, hospitality, transport and retail shopping. The proportion spent on each will vary between visitors depending on whether they are staying with friends and family, transport options etc. The latest international visitor survey data from MBIE<sup>4</sup> indicates that spending (on average) is split between:

- Accommodation 25%
- Hospitality 16%
- Road Transport 15%
- Entertainment 11%
- Shopping 10%
- Retail food / drink 7%

Domestic out of district visitors are likely to have a similar pattern. Of note from the latest domestic visitor survey data from MBIE<sup>5</sup> is the following key findings:

- Culture: 21% visited museum/gallery (overnight trips only)
- Barriers to future trips = Affordability (Too expensive) - overnight 32% - day trips 24%
- Average nights per trip = 2
- Whanganui share of Domestic nights across NZ = 1%
- 40% overnights in commercial accommodation
- Costs vary enormously depending on whether people stay with friends and family

<sup>4</sup> MBIE IVS September Quarter 2025

<sup>5</sup> MBIE DVS Domestic Visitors 6 months to Oct 2025

What these responses highlight is that Whanganui is a very small part of the national domestic visitor industry, so there is huge potential to lift domestic visitor numbers. Also notable is that only 40% of these visitors stay in commercial accommodation.

### Direct Operational Impacts

Many EIA reports also include the full operational costs as part of the direct benefits, and the multiplier impacts of that. For a local facility that is largely rates funded for operations this is likely to overstate the impacts. The money for the operations comes from local ratepayers and can be seen as a net zero change overall. This is money that ratepayers would have probably spent mostly locally anyway.

In order to take a conservative approach, the increase in operational spending for the Sarjeant Gallery has not been included, only the additional staff for the employment impacts. There is a positive impact from the fact that much of the capital budget was externally funded and that will have longer term benefits from a facility that would otherwise not have been built.

As a recognition of this longer term benefit the direct and flow on impacts of the additional jobs in the Sarjeant Gallery should be included.

| Whanganui District Driver                                      | Direct Impacts | Total Impacts (Direct plus Indirect and Induced) |
|--|----------------|--|
| Employment Impact (FTEs)<br>Gallery and Café (additional jobs) | 11.7           | 16.4   |
| Total Employment (FTE) of Sarjeant Gallery                     | 22.7           |  |

### Survey Data

During the October 2025 to January 2026 period Sarjeant Gallery staff carried out a series of visitor surveys to provide information on length of stay, reasons for visiting Whanganui and where people live. This data provides important information that underpins the economic impact calculations and conclusions. These surveys should be repeated on a regular basis to cover different seasons and to increase the robustness of the response data. Additional questions for international visitors may be able to further identify their decisions to visit the Sarjeant Gallery and Whanganui.

- Where visitors came from – 570 survey responses over four months showed relatively consistent results in the mix of visitors.

|        | Whanganui | Out of District<br>Domestic NZ | International | Number of<br>surveys |
|--------|-----------|--------------------------------|---------------|----------------------|
| Oct-25 | 23        | 22                             | 6             | 51                   |
| Nov-25 | 15        | 18                             | 11            | 44                   |
| Dec-25 | 53        | 46                             | 27            | 126                  |
| Jan-26 | 144       | 143                            | 62            | 349                  |
|        | 235       | 229                            | 106           | 570                  |
| Oct-25 | 45%       | 43%                            | 12%           |                      |
| Nov-25 | 34%       | 41%                            | 25%           |                      |
| Dec-25 | 42%       | 37%                            | 21%           |                      |
| Jan-26 | 41%       | 41%                            | 18%           |                      |
|        | 41%       | 40%                            | 19%           |                      |

- Visit to Whanganui – For those who are from out of Whanganui: How much did visiting the Sarjeant Gallery factor into coming to Whanganui? (277 out of district Survey responses from 475 visitors surveyed).

|                      | Not at all | One reason | Main reason | One or Main Reason |
|----------------------|------------|------------|-------------|--------------------|
| <b>Domestic</b>      |            |            |             |                    |
| Dec-25               | 24.4%      | 46.7%      | 28.9%       | 75.6%              |
| Jan-26               | 32.9%      | 45.5%      | 21.7%       | 67.1%              |
| Combined             | 30.9%      | 45.7%      | 23.4%       | 69.1%              |
| <b>International</b> |            |            |             |                    |
| Dec-25               | 70.4%      | 22.2%      | 7.4%        | 29.6%              |
| Jan-26               | 61.3%      | 27.4%      | 11.3%       | 38.7%              |
| Combined             | 64.0%      | 25.8%      | 10.1%       | 36.0%              |

- What was your reason for visiting Te Whare o Rehua Sarjeant Gallery? (tick as many as apply) – 475 Responses.

|  | 475 Surveys December 2025 and January 2026 |          |                        |                |
|--|--|----------|------------------------|----------------|
|  | Sole reason                                | A reason | Total sole or a reason | % of responses |
| See exhibition                                       | 22   | 83       | 105                    | 11%            |
| General interest, Curious, on holiday, in the area   | 185  | 431      | 616                    | 65%            |
| Event/workshop                                       | 6  | 3        | 9                      | 1%             |
| Café   | 5  | 66       | 71                     | 8%             |
| Retail   | 10   | 23       | 33                     | 3%             |
| With visitors, family and friends, Bringing children | 19   | 76       | 95                     | 10%            |
| Other  | 7  | 7        | 14                     | 1%             |
| Total Survey Responses                               | 254  | 689      | 943                    | 100%           |

- How many nights were visitors staying in Whanganui? 277 Responses across December 2025 and January 2026.

|                | Rest of NZ | Overseas |
|----------------|------------|----------|
| None           | 84         | 21       |
| 1              | 23         | 18       |
| 2              | 43         | 18       |
| 3+             | 38         | 32       |
| Responses      | 188        | 89       |
| Average Nights | 1.4        | 2.0      |

Note – 3+ nights were treated as 4 nights

- Accommodation – where are you staying (out of district 122 Responses). There were very similar responses from domestic out of district and International visitors. Survey size is on the small side.

Note - Overnight stays only

| Accommodation      | 122 Total Responses | Domestic  | International |
|--------------------|---------------------|-----------|---------------|
| Air BnB / BnB      | 41                  | 27        | 14            |
| Camping ground     | 13                  | 8         | 5             |
| Friends and Family | 30                  | 19        | 11            |
| Hotel / Motel      | 38                  | 26        | 12            |
|                    | <b>122</b>          | <b>80</b> | <b>42</b>     |
| Air BnB / BnB      | 34%                 | 34%       | 33%           |
| Camping ground     | 11%                 | 10%       | 12%           |
| Friends and Family | 25%                 | 24%       | 26%           |
| Hotel / Motel      | 31%                 | 33%       | 29%           |

- Satisfaction Ratings – September 2025 to January 2026 Surveys
  - 577 total surveys completed
  - 565 total satisfaction six or higher (1 – 10 scale where 10 is extremely satisfied)
  - 9 = Average satisfaction score
  - 98% satisfied (6 to 10).
- Age Group Profile

Based on October 2025 to January 2026 survey data the age group profile visiting the Sarjeant Gallery was concentrated in the older age groups (aged 50 – 79 years). While not a surprise the number of children (aged <15) were a much smaller proportion than seen in many museums and galleries in New Zealand. The school visit numbers that were 3.6% of ages 0 – 19 should be added to these - not showing up in these surveys.

| Age          | Number     | % of Respondents |
|--------------|------------|------------------|
| 0-14         | 13         | 2%               |
| 15-19        | 14         | 2%               |
| 20-29        | 50         | 9%               |
| 30-39        | 75         | 13%              |
| 40-49        | 65         | 11%              |
| <b>50-64</b> | <b>167</b> | <b>29%</b>       |
| <b>65-79</b> | <b>167</b> | <b>29%</b>       |
| 80+          | 19         | 3%               |
| Total        | 570        | 100%             |

Plus school visits = another 3.6% for ages 0 - 19

## Revenue Streams

In the current 2025/26 financial year the Sarjeant Gallery has budgeted for \$1,043,894 in gross revenue excluding Council rates, including the below.

### Shop sales

The very small retail shop in the foyer has been a success and makes a good net income for the Sarjeant Gallery. Gross sales in the year to January 2026 were around \$300,000, with net returns of \$123,489. That equates to sales of around \$2.70 per visitor.

The shop is part of the overall Sarjeant Gallery experience alongside the café. General experience from other facilities is that shop sales drop significantly if door charges are introduced.

There is limited opportunity to increase the shop sales as space is very limited.

|         | Shop Gross Sales | Annual  | Net Revenue | Annual  | Spend per visitor |
|---------|------------------|---------|-------------|---------|-------------------|
| Nov-24  | \$45,633         |         | \$37,595    |         | \$2.95            |
| Dec-24  | \$56,002         |         | \$19,538    |         | \$3.78            |
| Jan-25  | \$40,790         |         | \$3,798     |         | \$2.82            |
| Feb-25  | \$30,529         |         | \$5,046     |         | \$3.38            |
| Mar-25  | \$26,097         |         | \$5,274     |         | \$2.44            |
| Apr-25  | \$24,840         |         | \$2,891     |         | \$2.61            |
| May-25  | \$29,615         |         | \$20,894    |         | \$3.19            |
| Jun-25  | \$27,424         |         | \$17,701    |         | \$2.67            |
| Jul-25  | \$22,552         |         | \$5,953     |         | \$2.40            |
| Aug-25  | \$29,353         |         | \$19,346    |         | \$3.69            |
| Sept-25 | \$16,037         |         | \$1,883     |         | \$1.48            |
| Oct-25  | \$15,858         | 364,730 | \$3,256     | 143,176 | \$2.00            |
| Nov-25  | \$23,340         | 342,437 | \$16,651    | 122,232 | \$3.74            |
| Dec-25  | \$28,266         | 314,701 | \$14,571    | 117,264 | \$3.60            |
| Jan-26  | \$22,849         | 296,760 | \$10,023    | 123,489 | \$2.31            |

### Café

The café is a popular part of the Sarjeant Gallery and has a reasonable turnover. The average spend per visitor has increased since opening and the café operations are being reviewed to improve the net revenue outcomes. The monthly numbers are impacted by the number of wages payments in each month.

|         | Monthly gross revenue | Annual  | Net Revenue | Spend per visitor |
|---------|-----------------------|---------|-------------|-------------------|
| Nov-24  | \$49,923              |         | -\$4,749    | \$3.23            |
| Dec-24  | \$67,909              |         | -\$8,700    | \$4.58            |
| Jan-25  | \$67,782              |         | \$23,007    | \$4.69            |
| Feb-25  | \$44,112              |         | -\$9,393    | \$4.89            |
| Mar-25  | \$52,337              |         | -\$2,569    | \$4.89            |
| Apr-25  | \$46,503              |         | -\$4,062    | \$4.88            |
| May-25  | \$44,041              |         | -\$3,206    | \$4.75            |
| Jun-25  | \$52,550              |         | \$367       | \$5.11            |
| Jul-25  | \$46,457              |         | -\$9,216    | \$4.94            |
| Aug-25  | \$44,818              |         | -\$5,276    | \$5.63            |
| Sept-25 | \$46,021              |         | -\$7,967    | \$4.24            |
| Oct-25  | \$45,003              | 607,455 | \$3,516     | \$5.66            |
| Nov-25  | \$38,132              | 595,663 | -\$6,878    | \$6.11            |
| Dec-25  | \$40,845              | 568,599 | -\$20,912   | \$5.21            |
| Jan-26  | \$51,223              | 552,041 | \$6,400     | \$5.19            |

### Donations

There is a donations box at the entrance to the Sarjeant Gallery. This has not been a focus by Sarjeant Gallery staff during the opening period, but it has since been made more prominent to encourage more donations.

In the last year \$22,678 was donated either in cash or through an eftpos payment. It is not expected that donations from local residents will ever be significant – most residents would think that they already pay for the Sarjeant Gallery via the rates.

There is considerable opportunity to increase donations from out of district and international visitors. Overall, just 21 cents per visitor, or 35 cents per out of district visitor.

|         | <b>Donations<br/>(visitors)</b> | <b>Annual</b> | <b>Per visitor</b> | <b>Annual<br/>average</b> |
|---------|---------------------------------|---------------|--------------------|---------------------------|
| Nov-24  | \$581                           |               | \$0.04             |                           |
| Dec-24  | \$775                           |               | \$0.05             |                           |
| Jan-25  | \$2,657                         |               | \$0.18             |                           |
| Feb-25  | \$2,939                         |               | \$0.33             |                           |
| Mar-25  | \$2,495                         |               | \$0.23             |                           |
| Apr-25  | \$2,048                         |               | \$0.21             |                           |
| May-25  | \$1,420                         |               | \$0.15             |                           |
| Jun-25  | \$1,690                         |               | \$0.16             |                           |
| Jul-25  | \$645                           |               | \$0.07             |                           |
| Aug-25  | \$2,544                         |               | \$0.32             |                           |
| Sept-25 | \$178                           |               | \$0.02             |                           |
| Oct-25  | \$1,533                         | \$19,506      | \$0.19             | \$0.15                    |
| Nov-25  | \$2,668                         | \$21,593      | \$0.43             | \$0.18                    |
| Dec-25  | \$1,853                         | \$22,671      | \$0.24             | \$0.20                    |
| Jan-26  | \$2,665                         | \$22,678      | \$0.27             | \$0.21                    |

Private Hire Events, Ticketed Events, Tour Groups

The Sarjeant Gallery has spaces that can be hired for events, both ticketed public events and private hire events. The hire of parts of the gallery has the potential to be a significant revenue generator. To do so requires professional marketing and packages / facilities / equipment that cater to corporate and private demands, and associated staffing support. Some activities such as guided tours could increase gross revenue – but are unlikely to make a substantial addition to **net** revenue. Rather the potential is to attract more corporate and private events from outside the district which will boost visitor spending across the district.

|         | <b>Venue Hire</b> | <b>Annual</b> | <b>No. of private<br/>hire events</b> | <b># Attending</b> | <b>Ticketed event<br/>revenue (nett)</b> | <b>Tour group<br/>revenue</b> | <b>Annual Ticketed<br/>events and tours</b> |
|---------|-------------------|---------------|---------------------------------------|--------------------|--|-------------------------------|---|
| Nov-24  |                   |               |                                       |                    |  |                               |   |
| Dec-24  |                   |               |                                       |                    |  |                               |   |
| Jan-25  | \$1,302           |               | 1                                     | 65                 | \$0                                      | \$0                           |   |
| Feb-25  | \$0               |               | 1                                     | 143                | \$465                                    | \$0                           |   |
| Mar-25  | \$375             |               | 1                                     | 71                 | \$0                                      | \$1,340                       |   |
| Apr-25  | \$1,348           |               | 3                                     | 34                 | \$288                                    | \$0                           |   |
| May-25  | \$13,386          |               | 4                                     | 143                | \$1,207                                  | \$0                           |   |
| Jun-25  | \$327             |               | 1                                     | 23                 | \$0                                      | \$0                           |   |
| Jul-25  | \$4,818           |               | 5                                     | 47                 | \$300                                    | \$0                           |   |
| Aug-25  | \$929             |               | 1                                     | 50                 | \$1,005                                  | \$0                           |   |
| Sept-25 | \$6,788           |               | 4                                     | 708                | \$0                                      | \$0                           |   |
| Oct-25  | \$4,836           | 34,108        | 2                                     | 55                 | \$978                                    | \$506                         | 6,089                                       |
| Nov-25  | \$1,851           | 35,959        | 5                                     | 52                 | \$870                                    | \$138                         | 7,097                                       |
| Dec-25  | \$687             | 36,646        | 1                                     | 52                 | \$0                                      | \$0                           | 7,097                                       |
| Jan-26  | \$2,073           | 37,417        | 3                                     |                    | \$0                                      | \$0                           | 7,097                                       |

Sponsorships, Sarjeant Trust, Patron Friends of the Gallery and 1000 Stars donations

The Sarjeant Gallery is fortunate to have a network of supporters that work to support the gallery and raise money to help improve the collection. There 368 ‘friends of the gallery’ who pay a subscription. Surplus funds are gifted to the gallery – this was \$8,500 in 2025. These donations

are made intermittently and usually amount to around \$17,000 a year. There has also been \$24,681 of donations from Patron Friends and Stars.

Over the last 12 months donations into the Sarjeant Trust Endowment fund have totalled \$74,605 since the opening of the upgrade. Also of note is that each year, since its formation, the Endowment Fund has provided the Sarjeant Gallery with \$100k for collection acquisitions.

In addition there has been significant donations from the BC & Hewett Trust for collection restoration work. Alongside other contributions, since late 2023, the Trust have contributed \$84,794 towards collection conservation, with further work committed in the current financial year and ongoing years.

Sponsorships have totalled \$56,654 in the last year. Overall the Sarjeant Gallery has received \$147,239 in the last 12 months from these supporter groups. Total revenue including visitor donations has been \$170,016 in the year to January 2026. Noting the above comment on the endowment fund and other donations the total donations and other revenue is expected to be well over \$200,000 a year.

### **The Door Charge Debate**

The Sarjeant Gallery has free entry for all visitors. The issue of free entry versus door charges is a recurring discussion and is often raised during times of Council budget stresses. Council has a range of charging policies for recreation and cultural assets. These are often related to historical decisions and what is common practice across New Zealand.

The libraries are also largely free of entry and borrowing charges. In the past Councils have debated charging more for libraries but very few publicly owned libraries (almost entirely council owned) imposed charges for borrowing books. The few that did experienced dramatic reductions in usage and quickly dropped the charges.

Museums and art galleries are mostly free entry and only a few currently charge for entry. The Govett-Brewster Art Gallery | Len Lye Centre in New Plymouth introduced a \$15 door charge for out of district visitors aged 16+ in August 2018 after the new Len Lye Centre was completed in 2015, and increased this to \$17 in 2025. Taupo Museum also has a door charge for out of district visitors. Te Papa Tongarewa and Auckland War Memorial Museum introduced entry fees for international visitors recently.

In these cases the number of visitors that were targeted by the door charge dropped after the charges were introduced. This is especially for kiwis who are not expecting or accepting of a door charge. Revenue expectations can fall short as the number of paying visitors is less than expected.

Implementing a door charge will also increase operating costs. Additional staff will likely be required to permanently staff a new entrance counter to process a charge and check details for local residents, with cash handling and banking costs. Set up costs will also include a redesigned foyer that controls visitors from accessing the gallery.

The **net** costs of door charges and the consequent impact on the wider district economy should be considered as part of this debate.

The following shows two possible outcomes from implementing a door charge for out of district visitors. In a scenario that is seen as possible (but is still more optimistic than the outcome post door charges on the Govett-Brewster Art Gallery | Len Lye Centre) the Sarjeant Gallery

would net around \$140,000 in extra **net** revenue, but the district would see a drop in visitor spending (direct, indirect and induced) of over \$10 million a year. This would be reduced revenue to accommodation, hospitality etc. These numbers reflect the assumptions on a door charge of \$15, children aged up to 15 years free and discounts for students and older people aged 65+. The age group profiles used are those from the January 2026 Sarjeant Gallery visitor survey.

| Door charge \$15 to Out of District - under 15s free, students and aged 65+ \$10 |        |                          |               |                     |
|--|--------|--------------------------|---------------|---------------------|
|  | Local  | Domestic out of district | International | Total               |
| Current forecast June 2026 year  | 42,316 | 41,235                   | 19,087        | 102,638             |
| <b>Possible scenario Annual</b>  | 38,084 | 20,618                   | 13,361        | 72,063              |
| Visitor reduction Annual   | -10%   | -50%                     | -30%          | -30%                |
| Door charge Revenue - Annual   | nil    | \$250,710                | \$162,469     | \$413,180           |
| Loss of donations / other revenue (50%)  |        |                          |               | -\$85,000           |
| Less net revenue from shop and café (30%)  |        |                          |               | -\$50,000           |
| Additional operating costs   |        |                          |               | -\$138,000          |
| Net revenue gain to Sarjeant   |        |                          |               | \$140,180           |
| Reduction in Visitor spend impacts in district                                   |        |                          |               | <b>\$10,880,352</b> |
| <b>Optimistic Scenario Annual</b>  | 42,316 | 30,926                   | 17,178        | 90,420              |
|  | 0%     | -25%                     | -10%          | -12%                |
| Door charge Revenue - Annual   | nil    | \$376,066                | \$208,889     | \$584,954           |
| Loss of donations / other revenue (20%)  |        |                          |               | -\$34,000           |
| Less net revenue from shop and café (10%)  |        |                          |               | -\$17,000           |
| Additional operating costs   |        |                          |               | -\$138,000          |
| Net revenue gain to Sarjeant   |        |                          |               | \$395,954           |
| Reduction in Visitor spend impacts in district                                   |        |                          |               | <b>\$5,143,495</b>  |
| <b>Pesimistic Scenario Annual</b>  | 29,621 | 16,494                   | 9,544         | 55,659              |
|  | -30%   | -60%                     | -50%          | -46%                |
| Door charge Revenue - Annual   | nil    | \$200,568                | \$116,049     | \$316,618           |
| Loss of donations / other revenue (60%)  |        |                          |               | -\$102,000          |
| Less net revenue from shop and café (50%)  |        |                          |               | -\$85,000           |
| Additional operating costs   |        |                          |               | -\$100,000          |
| Net revenue gain to Sarjeant   |        |                          |               | \$29,618            |
| Reduction in Visitor spend impacts in district                                   |        |                          |               | <b>\$14,241,794</b> |

In an optimistic scenario where out of district visitor number dropped modestly the Sarjeant Gallery would net around an extra \$400,000 in revenue and the district would lose over \$5 million in total visitor spending.

These scenarios are for the 1st year post door charges. Visitor numbers may well recover over time, but in the case of the Govett-Brewster Art Gallery | Len Lye Centre door charge revenue has remained almost constant indicating that out of district visitors have not recovered.

Council should carefully consider the purpose of the Sarjeant Gallery within the overall visitor and cultural strategies for the district before deciding on door charges. The above scenario outcomes are based on the few other examples in New Zealand, and the recent survey data. More detailed survey data should be done to understand the possible impacts. There are many factors in visitor decisions and door charges are just one of them. The scenarios above just

illustrate that relatively modest reductions in visitors can have a substantial impact on the wider economy.

These debates are best done before the investment in the Sarjeant Gallery. Cultural facilities, in New Zealand, are not built or operated to make a return on investment. The benefits are to the cultural facilities and education for the local residents (adding to the range of ‘things to do’) and add to the portfolio of attractions in the district that attract out of district visitors. The economic benefits from the Sarjeant Gallery are mainly from spending from the additional visitors making a trip to Whanganui.

Once the facility is built there are high fixed costs. Maximising the number of people that enjoy the Sarjeant Gallery results in more benefits for the sunk and operating costs. Placing a door charge on out of district visitors will result in modest additional **gross** revenue to Council, but will almost certainly reduce the number of visitors and could significantly cut the spending impacts across the district (accommodation, hospitality, retail spending etc).

#### Learnings from Govett-Brewster Art Gallery | Len Lye Centre – New Plymouth

The Len Lye extension opened in July 2015. Visitors were largely local (78% New Plymouth District), with 18% from NZ out of district and 4% international. This is significantly different from the first year stats of the Sarjeant Gallery where local visitors make up around 40% of visitors. Prior to August 2018, all visitors to the Centre were able to enter and visit the Centre free of charge.

In the first year (2015/16) the Govett-Brewster Art Gallery | Len Lye Centre exceeded visitor forecasts. Numbers dropped after this as repeat visits declined, then plummeted by more than 50% after the entry fee for non – residents was put in place. This meant that the number of local visitors also dropped, perhaps with many not understanding that local residents were still free entry. Having to prove you are a local could also be another barrier to entry.

|                            | <b>Visitors</b> | <b>Entry fee tickets</b> | <b>% Out of District NZ</b> | <b>% International</b> |
|----------------------------|-----------------|--------------------------|-----------------------------|------------------------|
| 2014/15                    |                 |                          |                             |                        |
| 2015/16 (new LLC opens)    | 141,922         |                          | 14%                         | 3%                     |
| 2016/17                    | 116,206         |                          |                             | 15%                    |
| 2017/18                    | 96,736          |                          |                             |                        |
| 2018/19 (door charge \$15) | 47,188          | 16,234                   |                             |                        |
| 2019/20 (Covid)            | 52,260          | 14,068                   |                             |                        |
| 2020/21 (Covid)            | 60,748          |                          |                             | 1.5%                   |
| 2021/22 (Covid)            | 63,724          |                          |                             |                        |
| 2022/23                    | 84,500          |                          |                             |                        |
| 2023/24                    | 87,442          |                          |                             |                        |
| 2024/25                    | 79,147          | 14,255                   | 18%                         | 4%                     |

Source – NPDC Annual Reports and BERL report The economic impact of the Govett-Brewster Art Gallery / Len Lye Centre, September 2025.

The door charge was increased in July 2025 to \$17 for visitors from outside the New Plymouth District, with the current fee structure as follows:

- Seniors (65+) and Students (16+) are charged \$12
- Under-16s and Friends of the Gallery are not charged
- Local residents (proof required) free.

While visitor numbers have recovered somewhat since 2019, they are still 18% below the pre-door charge numbers. Of real interest is that the reported number of door charges has not increased as visitor numbers recovered. This implies that the recovery in visitor numbers are all local residents.

In total Govett-Brewster Art Gallery | Len Lye Centre collected \$213,825 in door charges (gross) in 2024/25, but have around 4,000 less out of district visitors compared to 2017/18. All else being equal the district has forgone five times that revenue in **direct** spending. After collection costs that ratio will be worse.

Also of note is that shop sales, donations and visitor satisfaction fell post the door charge being imposed.