



A Profile of Tourism in the Lake Waikaremoana Region

Independent visitation in rural New Zealand

Helen Fitt

Chrys Horn

Jude Wilson



Landcare Research Science Series No. 33



**Manaaki
Whenua
PRESS**

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**Manaaki
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P R E S S**

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1. Summary

This report provides the results of a survey of 191 visitors to Lake Waikaremoana, a remote area in Te Urewera National Park. Lake Waikaremoana has few established tourism services but significant tourist flows. Visitation is dominated by domestic tourists and the surrounding population is predominantly of Maori ethnicity. Lake Waikaremoana thus provided a case study that might be used to enhance understandings of the wider demand for tourism in isolated rural areas and to look at opportunities for the development of tourism and Maori tourism experiences in these areas.

The survey took place during two separate periods, one during the New Zealand school summer holidays and peak tourist season (referred to as 'Week 1') and one just after the end of the school holidays and during the shoulder season ('Week 2').

Who visits?

Domestic visitors made up 76% of the sample and came mostly from Auckland, Gisborne, Wellington and Tauranga. International visitors made up 24% of the sample and came mostly from the UK and Germany. Of the 191 respondents surveyed, 11 reported they are Maori and a further 3 reported that, while they themselves are not Maori, their spouse or partner and children are Maori.

The age profile of visitation during Week 1 (January) suggests a family holiday destination with a large number of visitors of school age and of 'parent age'. In Week 2 (February) there was an older visitation profile with a large proportion of the visitors being over 50.

Analysis revealed three distinct groupings of visitors:

- ? *Discovering visitors* have a limited history of visits to the area, they value exploring new areas, and show little in the way of personal connection to this particular destination.
- ? *Familiar visitors* tend to have been to the area once or twice before or are travelling with companions who had been to the area before. They have more experience or knowledge of the area than the discovering visitors but most still show little personal connection to the area.
- ? *Attached visitors* show strong connections to the area and most have visited numerous times (mean visits = 40). When talking about visit motivations they often speak of their connection to the area rather than of the physical attributes of the area itself.

How do visitors travel?

All visitors to Lake Waikaremoana came by road with 82% of respondents coming in private vehicles and the remaining 18% coming in rental vehicles. Some visitors appeared to find the conditions of the roads in the Lake Waikaremoana area (often unsealed, narrow and winding) difficult. The most commonly mentioned disincentive to repeat visitation was the length, difficulty and cost of the journey. Improved provision and marketing of transport services (both to access the region and within it) may help to increase visitor numbers, satisfaction and participation in dispersed activities.

However, a number of respondents asserted that the difficulty involved in accessing the region helped preserve its natural and peaceful character. Those respondents who did not want to see improvements made to the roads tended to be *attached* visitors. Thus any developments in the region may result in changes in the type, as well as numbers, of visitors present. Further work to determine the impact of road quality, distance and visitor characteristics on destination, route choice and length of stay would be useful.

Popular pre visit destinations were Napier, Rotorua, Havelock North, Wairoa, Gisborne and Hastings. There may be opportunities for marketing activities in these areas. Understanding the flow of tourists

through the Lake Waikaremoana region could assist local businesses to capitalise on opportunities to attract tourists into the area and into their businesses.

Where do visitors stay?

More than half the visitors surveyed were staying in the Lake Waikaremoana Motor Camp, the largest single accommodation facility in the area. There is a match between the accommodation currently available in the area and the accommodation types preferred by current visitors. Visitors did not appear to be staying in accommodation they would not otherwise choose in order to be able to access the region. However, the extent to which other groups of visitors are put off visiting because their preferred types of accommodation are unavailable is unclear.

Why do people visit?

Recommendations from others (person, guidebook, brochure) was the reason discovering visitors most frequently gave for visiting. Prior experience was the most frequent reason that repeat and habitual visitors reported. The natural environment was given as a motivation by 39% of the sample, 34% reported coming for some kind of activity (e.g., tramping, hunting, fishing and boating), and 24% reported accompanying, or meeting up with, others as a motivation. The most commonly cited factor attracting respondents to return to the region was a desire to do more walking or tramping.

Where do people get their information about the area?

For discovering visitors, guide books were the most popular source of information used while planning their trip. Recommendation from family and friends, information centres, the internet and brochures were also frequently used. Familiar visitors and attached visitors used fewer information sources to plan their visits but when they did seek out information they used similar sources to those used by discovering visitors.

International and domestic visitors used information sources differently. 45 of the 46 visitors who had not used any information sources were domestic visitors. Only one international visitor reported using no information sources.

What do visitors do in the area?

Eighty-seven percent of respondents reported doing some walking or tramping while in the area making these the most popular activities amongst visitors. Swimming and relaxing were each undertaken by over half the sample. Other activities included scenic driving, fishing, and boating or kayaking.

What opportunities are there for tourist businesses?

As well as asking visitors what they did in the area the surveyors asked them what they might be interested in doing if other activities were available. While independent activities appeared more popular than guided activities, there may be scope to offer some guiding services in the area. Domestic visitors appeared more attracted to guided activities than did international visitors, and women more so than men.

Some activities have repeat appeal while others are seen as novel, new or one-off opportunities. The characteristics of a product will help determine whether it is most suitable for discovering visitors or whether, for example, attached visitors might become repeat purchasers.

Few visitors to Lake Waikaremoana had made activity bookings before arriving in the region, suggesting there may be considerable scope for at-destination marketing. Younger visitors and discovering visitors seemed to have the most flexible travel itineraries. It may be possible to encourage these visitors to change their plans, and even extend their stay, once they have arrived at Lake Waikaremoana. Individuals with an interest in guided activities use few information sources when planning their trips so at-destination marketing is likely to be very effective for guided

activities. For small businesses wanting to engage in en-route marketing it may be worth several providers banding together to develop a joint brochure or poster for display at information centres around the region.

Responses suggest the opportunity to see a new place may be an important reason for trips to this region, particularly for discovering visitors. Operators may be able to capitalise on this through facilitating access to the more remote parts of the region. Attached visitors appear more attracted by the nature of an activity rather than its location.

Visitors in our survey did not know or understand what to expect from Maori tourism products – for example international visitors did not understand the term “marae” and domestic visitors were not certain of their access to marae stays when not part of a group. Businesses offering products of which tourists may not have previous experience need to pay special attention to marketing and information distribution so that visitors understand what is being offered.

2. Introduction

2.1 About Te Tapoitanga Maori

This research explores visitation to the Lake Waikaremoana area and contributes to a larger project, *Te Tapoitanga Maori – Growing Regional Maori Tourism*, aimed at developing sustainable growth in tourism for Maori businesses and employment. Te Tapoitanga Maori works in 2 case study areas to investigate demand for eco-cultural tourism and supply of eco-cultural tourism products. Through understanding demand and supply the project aims to understand the opportunities for, barriers to and support needed by fledgling tourism operations. By working in more than one case study area the project seeks to identify themes that may be applicable across New Zealand.

New Zealand's Tourism strategy aims to develop sustainable, quality tourism away from the main tourist routes to cater for a large increase in 'interactive travellers' who seek to interact with natural, social and cultural environments outside main tourist hubs. Previous research from the project explored tourists' consumption of Maori cultural tourism products, what tourists consider Maori cultural tourism to be and what value is added to mainstream tourism products by Maori cultural components (Wilson et al. 2006). This previous research established that international tourists often do not recognise Maori culture even if they have just participated in an experience with some Maori cultural content. It also found that while Maori cultural components appear to add some value to an experience, tourists will not necessarily pay more than they would for a similar experience without the cultural components. The research concluded that demand for eco-cultural tourism in New Zealand is driven more by demand for the 'eco' than for the 'cultural'. The research also identified a need for further research with domestic tourists to better understand their views on Maori cultural tourism.

With these findings in mind the research described in this report focussed on a case study area where a high percentage of visitors are people who live in New Zealand and where there is little available in the way of cultural tourism but where the natural environment is well suited to eco-tourism. This research aimed to understand more about the demand for eco-cultural tourism through profiling tourism in the Lake Waikaremoana area and looking at potential areas of tourism development.

While Lake Waikaremoana was the focus of the study, many other rural destinations in New Zealand share similar characteristics, and those who work in those regions will find many parallels here with their own circumstances.

2.2 About Lake Waikaremoana

Lake Waikaremoana is located in the southern part of Te Urewera National Park, in the east of the North Island of New Zealand. Map 1 shows the location of Te Urewera and Lake Waikaremoana and their relation to some of the region's larger population and tourism hubs.

At 212 672 hectares, Te Urewera is one of New Zealand's largest national parks and contains the largest forested wilderness remaining in the North Island (Department of Conservation 1). The remoteness and difficulty of access to parts of the park have helped protect some of the park's native and rare wildlife (Department of Conservation 2).

The area is home to one of New Zealand's nine Great Walks. The Great Walks are managed by the Department of Conservation (DOC) and are the Department's premier walking tracks through some of the best scenery in the country (Department of Conservation 3). It usually takes 3 to 4 days to walk the whole of the Lake Waikaremoana Great Walk but visitors can also walk shorter sections either as

day walks or include overnight stays in the huts or campsites along the route. The Lake Waikaremoana Great Walk is one of the major attractions in the area.

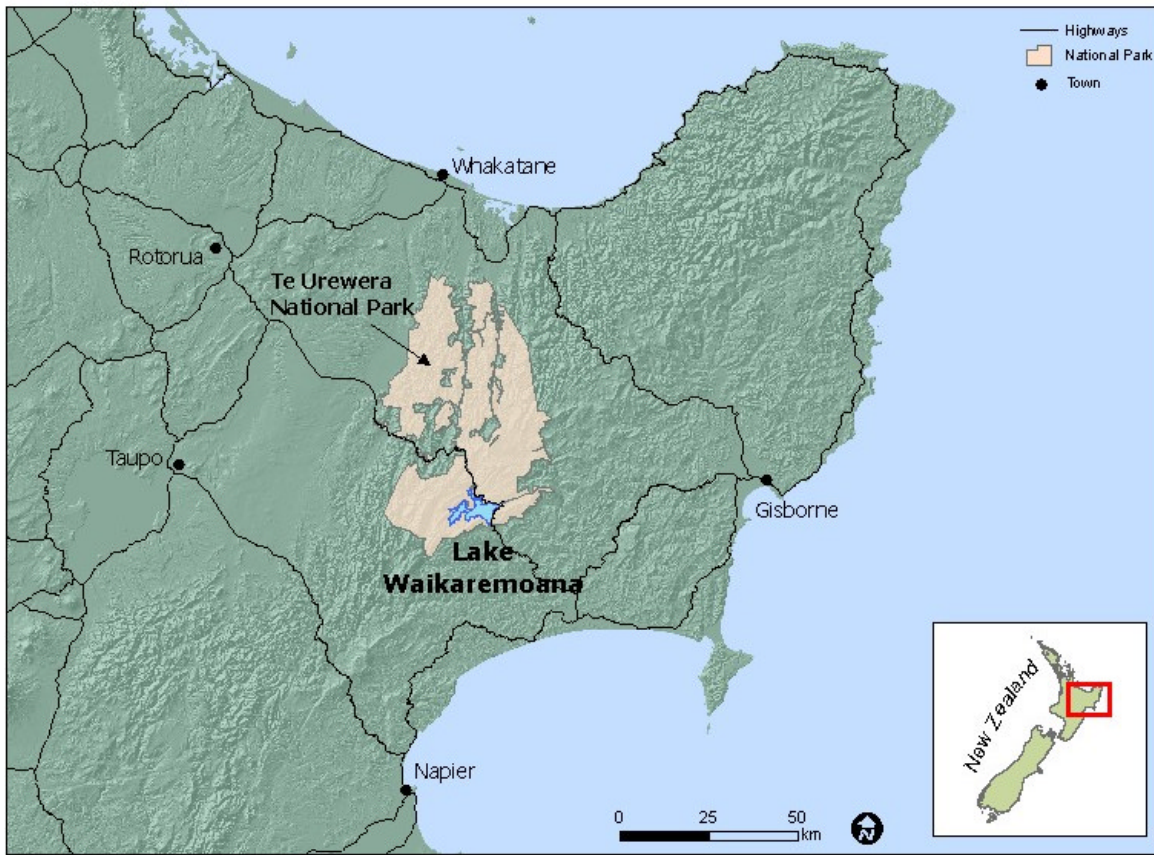
Lake Waikaremoana itself was formed 2200 years ago by a huge landslide that blocked a narrow gorge and allowed water to build up creating a lake over 240 metres deep (Department of Conservation 2). The shores of the lake are mostly uninhabited, and large sections are inaccessible by road. Several visitor facilities are available on the shores of the lake, and within the boundary of the national park, including a number of unserviced campsites, a fully serviced motor camp, and a visitor centre.

The motor camp has a small shop selling basic groceries and camping and fishing supplies. It also has a petrol pump, public telephones, boat ramps and boat mooring facilities. The motor camp shop is the hub of local visitation and many of the visitors who do not stay at the motor camp visit the shop for ice creams, newspapers, groceries, and petrol.

Visitors can book accommodation in the park's backcountry huts and can hire rowboats for nearby Lake Waikareiti from the visitor centre. The visitor centre also houses a small museum of local Maori and European history.

Further accommodation facilities can be found a few kilometres south of the southern boundary of the national park, including an outdoor education camp available for group bookings, a small holiday park including several self-contained units, a backpackers accommodation block and a campsite a homestay, and a lodge. The small village of Tuai (c. 10k m from the motor camp) also has a shop and a few other facilities mostly used by local residents.

The local population is predominantly of Maori ethnicity (around 70% compared with a national average of below 20%), has high unemployment (20% compared with the national average of 7.5%), and low income (around 68% of the national median) (Statistics New Zealand 2003). The Te Tapoitanga project is working with several local business people interested in enhancing the area's tourism offering.



Map 1: New Zealand, Te Urewera and Lake Waikaremoana

Background NZTopo Database sourced from LINZ; DEM hillshade map from Landcare Research.
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2.3 Methods

Piloting and adjustment

An administered questionnaire was completed with 191 visitors to Lake Waikaremoana. The full questionnaire is shown in Appendix 1. While it was not possible to pilot the questionnaire in the Lake Waikaremoana area before the survey began, the survey was tested with colleagues in reference to recent holidays they had taken. As the survey progressed, slight alterations were made to ensure the questionnaire was as effective as possible. For example, respondents who arrived in a campervan or motor home were not initially asked whether this transport was privately owned or had been rented for the trip – a question was added to ascertain the answer to this. Where not all respondents were asked exactly the same question this has been noted in the results.

Survey timing

The survey took place during two separate survey periods: one during the New Zealand school summer holidays and the peak tourist season (referred to as ‘Week 1’), and one just after the end of the school holidays and during the shoulder season (‘Week 2’). Each period included a weekend and 2 weekdays. Throughout this report data from both survey periods are generally presented together; however, where there are meaningful differences between the two periods the data are presented separately.

Survey Week	Dates
1	12–15 January 2006
2	24–27 February 2006

Due to the low number of visitors present in the area most of the individuals observed by surveyors were approached and asked to take part in the survey. Those individuals who were approached but who lived or worked in the area were not surveyed. The map given in Appendix 2 shows the area covered by the survey and the area outside which individuals had to live in order to be eligible for the survey.

There were fewer visitors in the area during Week 2 and, although surveying schedules were similar for both weeks, they noted it was more difficult to find respondents in Week 2. While there was a fairly steady stream of visitors through survey locations in Week 1, in Week 2 there were significant quiet periods when it was difficult to complete surveys. Of the target of 100 completed surveys per week, surveyors managed to complete 100 surveys in Week 1 but only 91 surveys in Week 2.

Survey process

Surveyors read the questions from the questionnaire to respondents and made a note of their answers. Answers were queried if they were confusing or unclear or if surveyors thought that the respondent might have misunderstood the question or forgotten to include something. This may mean responses differ slightly between the two surveyors as they may have queried responses differently. However, surveyors worked together closely, and no indications of problems of this nature were evident during analysis.

Most of the respondents were surveyed at the Lake Waikaremoana Motor Camp. The motor camp is both a major accommodation provider and a site for boat access to the lake. It also has petrol for sale and a small shop selling basic provisions such as bread, milk, newspapers, batteries, and maps. The shop is used by guests of the motor camp, by passing trade (particularly around lunchtime), and by people staying in other accommodation who call in to purchase groceries or snack food. Confidence in the sample is improved by the number of repeat encounters made with the same visitors in different locations. On the visits the researchers made to other accommodation sites, to the DOC information

centre, and to a nearby picnic spot they met many of the same people to whom they had already spoken outside the shop at the Lake Waikaremoana Motor Camp. Those they had not already met they often met subsequently – outside the shop. Even when the two surveyors were surveying in different places at the same time they frequently met people who, often only minutes before, had been surveyed by the other surveyor elsewhere.

Surveyors tried to ensure that only one person was surveyed from each group of people travelling together. However, on some occasions it may not have been clear that another member of the party had already been surveyed and some duplication may have occurred. Most questions related to the individual respondent only and the inclusion of several people from the same group will have had a minimal effect on the results.

On a number of occasions respondents were approached in pairs or groups. While one individual was chosen as the main respondent for the survey (and it was their gender, age and other demographic characteristics that were recorded) their answers were often influenced by comments from their companions. While respondents were asked how many people they were travelling with and the ages of these companions, all other questions were designed to be answered with regard to the individual respondent alone. Where possible the responses of the main respondent were prioritised over any comments made by companions.

Refusals

Very few respondents refused to complete the survey. Those who did refuse generally did so because they were under pressure in some way, e.g., one respondent refused because she wanted to get her tent up before it started to rain, another, who had just arrived and wanted to put her milk in her motel room fridge, came back later and volunteered to be surveyed then. Several overseas visitors refused to take part because they did not speak sufficient English. Records suggest those people who refused to take part were similar in most observable respects to the cohort as a whole and no particular bias in cooperation was noted.

Both survey weeks were periods with exceptionally fine weather. There was a brief, light rain shower during Week 1 but in general both survey periods were fine and sunny. This may have had an influence on the sample of people surveyors were able to survey. It is also likely to have had an impact on the responses provided, including on the activities undertaken and on the facilities or activities visitors said they would like to see developed in the area.

Reporting

As a small number of respondents did not answer every question on the survey some results are shown for less than 191 visitors.

In some instances respondents to the survey were able to give more than one answer to a question. For example, when asked which information sources they had consulted before their visit, a respondent's answers may have included guide books, brochures, and a telephone directory. In cases where respondents were only able to give one answer the report refers to the number of *respondents* who gave a particular answer. Where respondents were able to give more than one answer the report often refers to the number of *instances* in which a particular answer was given.

Similarly, the answers to some questions were recorded in the words of the respondent and coded later. In many cases more than one code applies to the answer given by the respondent. For example, when asked why she visited Lake Waikaremoana one respondent answered, Came here because we've never been. It was highly recommended. We're touring East Cape.

This response matches three of the codes used for analysing motivations for visiting the area:

- ? never been before
- ? recommendation (unspecified source)

? convenient (or in the right area/on the route)

In this case the number of coded answers given will be significantly higher than the number of respondents who provided an answer.

This report explains and summarises some of the findings of the survey. The report is divided into 8 sections focussing on topics covered by the questionnaire:

Demographics of sample – gives a brief description of the demographic characteristics of the people who took part in the survey.

Motivations and repeat visits – explores why respondents were visiting the area, whether, and how often they had visited before, and what factors might influence future decisions to visit.

Classifying visitor types – uses some of the information from the previous section to define three distinct visitor classifications: discovering visitors, familiar visitors, and attached visitors.

Travel and planning – considers how people travelled to Lake Waikaremoana, including travel mode, route choice, single and multiple destination visits, and pre-visit information use.

Accommodation – looks both at the accommodation in which visitors were actually staying and at the accommodation in which they would choose to stay had a wider range been available. Also considers pre-visit accommodation booking behaviour.

Activities – investigates participation in a range of activities in turn, exploring both actual participation and stated activity preferences.

Guiding – summarises respondent preferences for guided, accompanied or independent activities and briefly looks at preferences for guides of local origin and culture.

Wish list – presents responses to questions on future developments in the local area.

3. Results

3.1 Demographic of sample

The survey took place during two separate survey periods, one in January (Week 1) and one in February (Week 2). There were some differences between the demographic profiles of the visitors surveyed in the two survey periods:

- ? The Week 2 sample had a higher percentage of international visitors than did the Week 1 sample (Week 1 = 20% international, Week 2 = 27% international).
- ? Week 2 had an older sample than Week 1 (mean age of respondents in Week 1 = 44 years, Week 2 = 52 years).
- ? The Week 2 sample included a higher percentage of women than did the Week 1 sample (Week 1 = 51% women, Week 2 = 56% women).

Respondents to the survey were asked where they normally live. Those respondents who normally live in New Zealand are considered to be 'domestic respondents'; those who normally live overseas are classified as 'international respondents'¹.

While Week 2 included slightly more international visitors than Week 1, visitors in both periods came from a similar range of residential origins; the origins of all respondents are shown in Table 1.

¹ This classification does not take account of nationality or legal residence or citizenship status. Surveyors were aware that some of those classed as international respondents were New Zealanders who live overseas and had returned to New Zealand to visit. Similarly some of those classed as domestic respondents were immigrants to New Zealand.

Table 1: Normal place of residences of domestic and international respondents

Normal place of residence (domestic)	Number of respondents
North Island	143
Auckland	30
Gisborne	17
Wellington	10
Tauranga	10
Napier	7
Hastings	7
Hamilton	5
Taupo	5
Other North Island	52
South Island	3
Total	146

Normal place of residence (international)	Number of respondents
UK	16
Germany	10
US	4
Australia	2
Canada	2
Israel	2
Switzerland	2
Austria	1
Denmark	1
Czech Republic	1
Netherlands	1
Norway	1
South Africa	1
Sweden	1
Total	45

The most striking demographic difference between the two samples is that of differences in ages of respondents. The mean age of respondents in Week 1 was 44 years and the mean age of respondents in Week 2 was 52 years.

There was a slight difference in gender ratios between the two samples (Week 1 = 51% female, Week 2 = 56% female) but this does not appear linked to the age difference between the two samples. The

mean age of male and female respondents in Week 1 was similar as was the mean age of male and female respondents in Week 2 (Table 2)

Table 2: Mean age of respondents by survey week and gender

	Female	Male	All
Week 1	43	45	44
Week 2	52	52	52
All	47	48	48

Week 2 included more international respondents than did Week 1. Domestic respondents tended to be slightly older than international respondents (mean age of domestic respondents = 49 years, mean age of international respondents = 42 years), suggesting that the inclusion of more international respondents in Week 2 would lead to a lower mean sample age. However, both international and domestic sub-samples had a higher mean age in Week 2 than in Week 1 (Table 3). Possible reasons for the interesting age profile of the different samples are investigated below.

Table 3: Mean age of respondents by survey week and origin

	International	Domestic	All
Week 1	37	45	44
Week 2	46	54	52
All	42	49	48

Chart 1 shows the ages of domestic visitors (both respondents and their companions) visiting in Week 1 and Week 2².

In Week 1 there are clearly two age peaks: visitors aged between 8 and 17 (labelled 'A' on Chart 1); and visitors aged between 41 and 50 (labelled 'B'). This profile suggests a family holiday destination with large numbers of visitors of school age and 'parent age' – that is, of an age where they are likely to have school age children.

In Week 2 the number of children of school age included in the sample is much lower. A third of those children present are accounted for by a single school group visiting the region for the Great Walk (the dotted line on Chart 1 shows the number of children present if those in this school group are excluded). The adults visiting in this period are not concentrated into a distinct age peak but are spread across a wider age range. It seems likely the age difference between the domestic respondents in Week 1 and those in Week 2 is largely a result of the age profile of those who are only able to visit the area during the school holidays.

² The charts use a 10 year rolling average of ages to produce a smoothed curve.

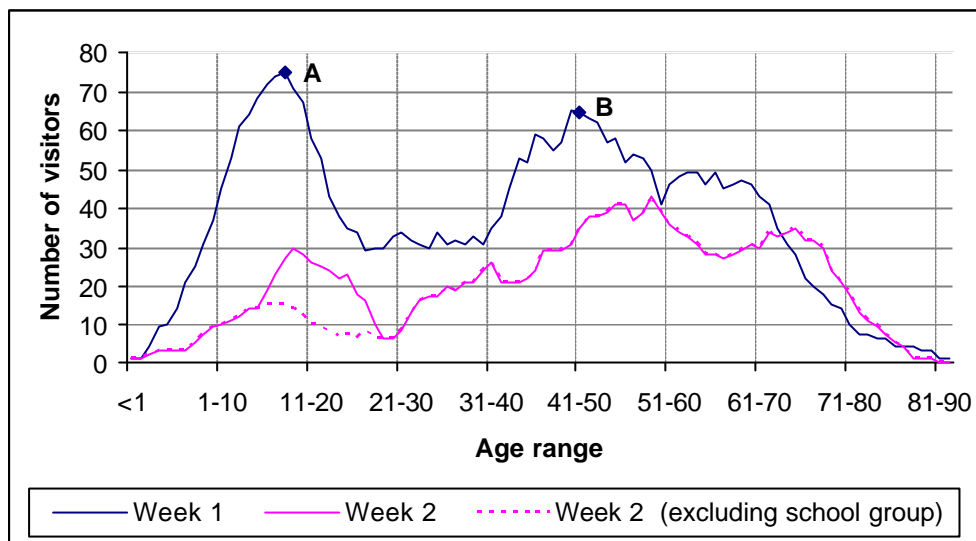
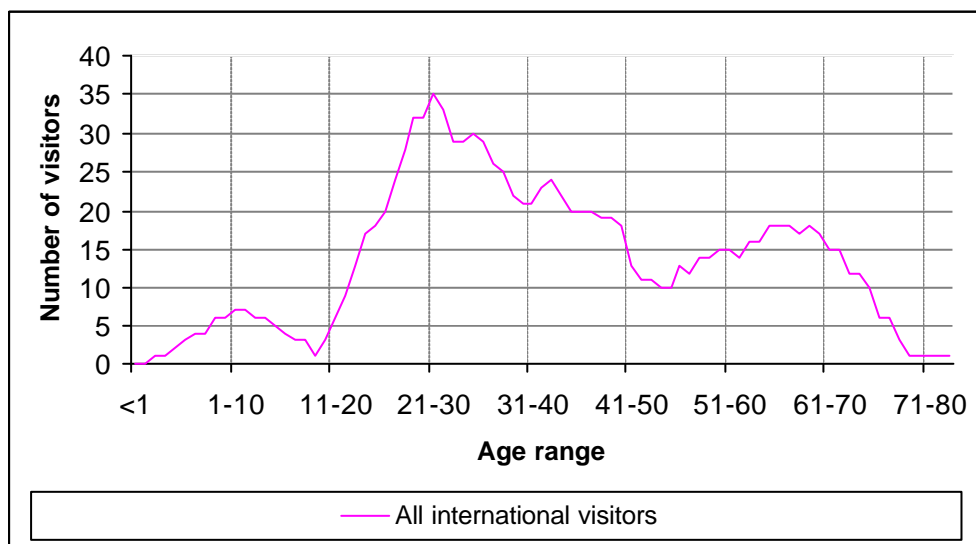
Chart 1: Ages of domestic respondents and their companions by survey week

Chart 2 shows the age profile of international visitors. The large number of international visitors in their 20s or early 30s is consistent with other international visitor data (Regional Visitor Monitor (RVM) 2006). The International Visitor Survey (IVS) shows that visitors from the UK and Germany (the two largest groups of international visitors surveyed for this project) have particularly young profiles (IVS, YE March 2006). While international visitors make up only 24% of the combined Week 1 and Week 2 sample, they make up 48% of those aged 19–30, and 61% of those aged 19–23.

Chart 2: Ages of international respondents and their companions

The sample of international visitors to Lake Waikaremoana is rather small to be separated into Week 1 and Week 2 cohorts. The International Visitor Arrivals Survey (IVA 2006) shows clear seasonal age patterns of visitation to New Zealand broadly consistent with school holiday dates in some of New Zealand's key North American and European visitor markets. It may be that the age profile of international visitors to Lake Waikaremoana is related to school holiday dates in the same way as the age profile of the domestic sample is related to school holidays in New Zealand.

Ninety of the 191 respondents surveyed were travelling with one companion. The sample included a number of respondents travelling in large groups with friends and family and four of these groups

included 10 or more individuals. The sample also included one respondent from each of a school group and a special interest tramping party. 16 respondents were visiting the area as part of a caravan club meeting but were not travelling as a group; rather they were in several small groups who met up in the area. The mean size of travelling groups was just over 3 people.

Of the 191 respondents surveyed, 11 reported that they are Maori. A further three reported that, while not Maori themselves their spouse or partner and children are Maori and so they consider themselves to have a strong connection to Maori. Of the 14 respondents who were either Maori or who have strong connections to Maori, 5 normally live in Tauranga, 3 in Auckland, 1 in Wellington, and the remaining 5 normally live elsewhere in the North Island.

3.2 Motivations and repeat visits

To start to build an understanding of visitation in the Lake Waikaremoana area respondents were asked why they had chosen to visit the area and whether they had visited before. This section considers common factors motivating respondents to visit and explores some of the factors influencing the frequency of visits; it also considers factors that respondents report will influence their decisions to return in future.

Motivations

Respondents to the survey were asked their main reason for choosing to visit the Lake Waikaremoana area. Where a respondent's answer was based on a characteristic or activity that cannot be considered unique to the area, the surveyors asked why that characteristic or activity had brought the respondent to this area rather than elsewhere.

*Q: What was your main reason for choosing to visit the Lake Waikaremoana area?
(If respondent mentions a particular activity probe why they have chosen to do that activity here, i.e. why kayaking here or why this great walk instead of one of the others)*

Most respondents gave more than one reason for choosing to visit the area. The majority of responses fit into one of four categories:

- ? prior knowledge or experience
- ? environment
- ? activities
- ? companionship

Prior knowledge or experience

122 respondents (64%) mentioned either a prior experience in the area (e.g., a previous holiday or a drive through the region), how they found out about the area (often from recommendations, guide books or information centres), or that never having visited was part of their motivation for visiting (Table 4). Some respondents mentioned more than one of these motivations.

Table 4: Prior knowledge or experience as a reason for visiting.

Knowledge or experience	Number of respondents
Found out about area	58
Previous visit	47
Never been before	31

Although 'never been before' implies a lack of direct previous experience in the area it also implies a certain amount of prior knowledge. Those individuals who used this category as their motivation to visit the region had sufficient prior knowledge to evaluate the attractiveness of the region and attribute a value to visiting (Gursoy & McCleary 2004).

Environment

Seventy-five respondents (39%) reported that their motivation was linked to the natural environment of the area. These comments often included references to the lake, the bush or the general scenic beauty of the area. There were also a number of comments about the area being remote, quiet, uncrowded, unspoilt, and relaxing. Two respondents also mentioned that they had specifically chosen the area because it was a National Park. Table 5 shows the number of respondents mentioning each of these motivations. Some respondents mentioned more than one of these motivations.

Table 5: Environment as a reason for visiting

Environment	Number of respondents
Lake, bush or nature	32
Beauty or scenery	22
Quiet or relaxing	19
Remote or uncrowded	17
Unspoilt or undeveloped	8
National Park	2

Activities

Sixty-three respondents (34%) mentioned a particular activity or activities they were keen to do in the region. Tramping, hunting, fishing and boating were the most popular activities mentioned as motivations for visiting the area (Table 6).

Table 6: Activities as a reason for visiting

Activity	Number of respondents
Tramping or walking	40
Hunting or fishing	22
Boating (motorboat, kayak or rowboat)	8

Companionship

Forty-six respondents (24%) said their motivations for visiting the area were influenced in some way by the people who they would be spending time with during the visit. Some of these respondents came as part of groups that had specifically chosen this area, while others were meeting people in the

area. Fourteen respondents commented that the area offered opportunities to spend quality time with their companions. One respondent mentioned that her group had a local person acting as a guide and that was a reason for the group choosing this area. The number of respondents mentioning each of these motivations is shown in Table 7.

Table 7: Companionship as a reason for visiting

Companionship	Number of respondents
Group trip	27
Opportunities for quality time	14
Meeting friends or relatives	5

Other motivations

In addition to these four categories, 19 respondents mentioned that the area was convenient because of its proximity to their home or to other places they were visiting³, and 30 respondents made comments about generally liking the area without specifying exactly what it was about the area that they found attractive. A number of other reasons for visiting were given by individual respondents; just a few of these are listed in Table 8.

Table 8: Examples of other reasons for visiting

Reasons for visiting
Commissioned to take a photo for TNZ
Investigating whakapapa ⁴
Attending an event for Jehovah's Witnesses
It's far enough from Auckland that there aren't many Aucklanders around
Attending a hui (but if hui was elsewhere might not have been keen to go)

Repeat visits

Respondents were asked whether they had been to the area before and how likely they thought they were to visit again in future.

Q: Is this your first time in the Lake Waikaremoana area?

If not...

³ Proximity and convenience are discussed later in this section and again in section 3.4, 'Travel and planning'.

⁴ 'Whakapapa' is a Maori word roughly translated as 'genealogy'. Whakapapa can include "the many spiritual, mythological and human stories that flesh out the genealogical backbone" (Maori.com 2006).

Q: Not counting this trip, how many times have you been to the Lake Waikaremoana area?

Q: How likely do you think you are to come back to the Lake Waikaremoana area in the future?

Definitely

Probably

Really don't know

Probably not

Definitely not

Of domestic respondents, 69% (100) reported having visited the area at least once before, and 82% (119) said they would 'definitely' or 'probably' visit the area again.

Mean travelling time for the journey from home to Lake Waikaremoana was calculated for domestic respondents⁵ based on where each respondent lived. The mean time it would take this sample to drive from their homes to Lake Waikaremoana was 4 hours 21 minutes. Those respondents who lived less than 4 hours 21 minutes away were slightly more likely to have previously visited the area and were more positive about the likelihood of revisiting it than were those who lived further away (Table 9).

Table 9: Repeat visits by domestic respondents by travelling time from home

	Have visited before (%)	Will 'definitely' come again (%)	Will 'probably' come again (%)
Live less than mean travelling time away	75	65	20
Live more than mean travelling time away	61	43	36

Of those who lived less than the mean travelling time away, 75% had visited before, compared with 61% of those who lived more than the mean travelling time away.

Of the 146 domestic visitors, 82% expressed a positive likelihood of return by saying they would 'definitely' or 'probably' visit again. This positive likelihood of return was expressed by similar numbers of those who lived less and those who lived more than the mean travelling time away. Of those who lived less than the mean travelling time away, 85% said they would 'definitely' or 'probably' visit again compared with 79% of those who lived further away. However, those who live less than the mean travelling time away expressed the likelihood of return with more certainty. Of those people who lived less than the mean travelling time away, 65% said they would 'definitely' visit

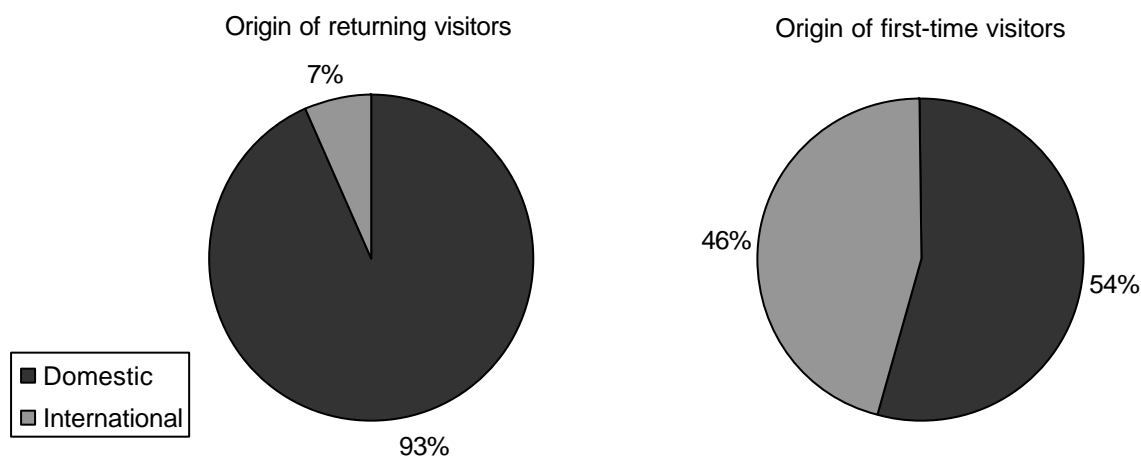
⁵ Travelling time for each respondent was calculated using mapping software. The calculation was based on the settlement in which the respondent reported living so, for example, all respondents from Auckland were attributed the same travelling time regardless of whereabouts in Auckland they lived. The calculation took account only of place of residence, not of whether the respondent was visiting the area as part of a longer trip including other destinations.

again, compared with only 43% of those who lived further away. However, 36% of those who lived further away said that they would 'probably' visit again, compared with only 20% of those who lived closer. This suggests that while most respondents would like to return, the length of the journey acts as a disincentive for those who live further away.

International visitors were, unsurprisingly, less likely to have visited the area in the past and less likely to say that they would come back than were domestic visitors. However, 7 (16%) of the 45 international visitors had been to the area before and 21 (46%) said they would 'definitely' or 'probably' come back in future.

Chart 3 shows that 93% of respondents who had been to the area before were domestic visitors, and 54% of respondents who were visiting the area for the first time were domestic visitors.

Chart 3: Returning and first-time visitors by domestic or international status



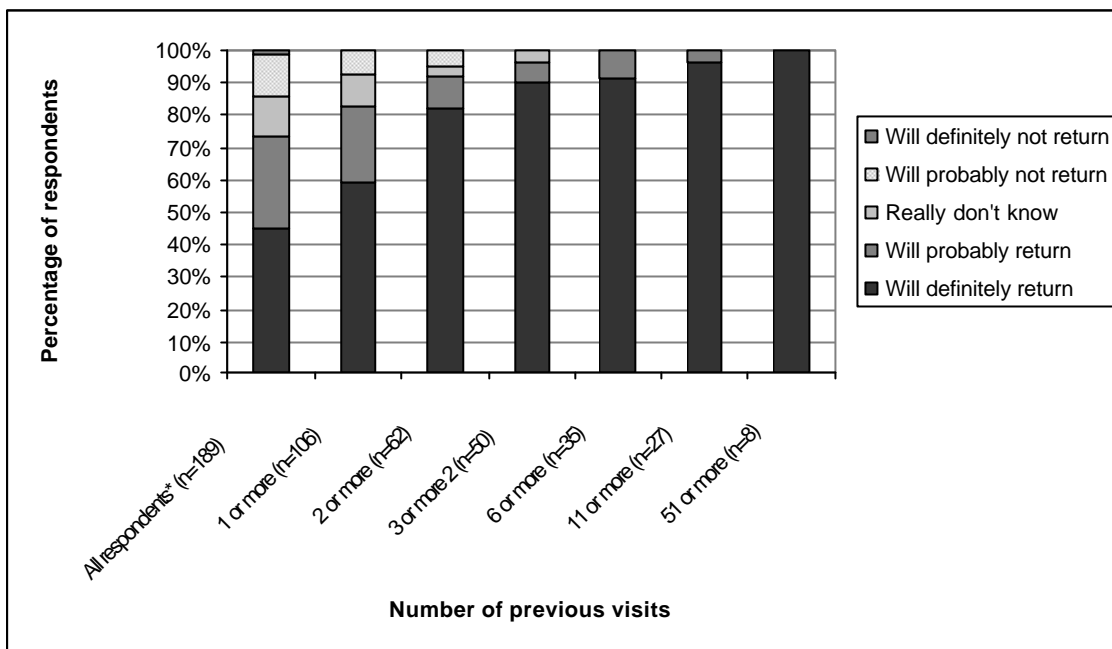
Those people who had visited before spent more nights in the area than those who were first-time visitors. First-time visitors spent a mean of 3 nights in the area, whereas those who were repeat visitors spent a mean of 4.6 nights.

Those respondents who were spending more nights in the region ranked the likelihood of their returning to the region higher than those who were spending fewer nights (Table 10).

Table 10: Mean length of stay of respondents by stated likelihood of return

	Mean length of stay (in nights)
Respondents who said they will 'definitely' return	4.4
Respondents who said they will 'probably' return	3.9
Respondents who said they 'really don't know' whether they will return	3.1
Respondents who said they will 'probably not' return	3.0
Respondents who said they will 'definitely not' return	0.5

In addition, the more previous visits respondents had made to the area the more likely they were to rate the probability of their return as high.

Chart 4: Respondents' likelihood of return by number of previous visits

* 'All respondents' excludes two respondents who did not answer all the questions from which data for this chart are taken.

Chart 4 shows the number of times respondents have visited the Lake Waikaremoana area and how likely they say they are to visit again. The chart is cumulative: at the far left of the chart all respondents are included; at the far right, only those respondents who had made more than 50 previous visits to the area are included.

In summary, respondents who have visited previously stayed longer and reported being more likely to return.

Finally, respondents were asked what factors would be important in influencing a decision on whether to visit the area again.

Q: Why do you think you would definitely/probably/definitely not/probably not come back? (Or) What factors would your decision of whether to come back depend on?

Some people reported that their reasons for revisiting would be the same as their reasons for the visit during which they were surveyed. Most of those who responded in this way had already visited the area more than once. Reasons covered above are not repeated here.

The most common response (41 respondents) to this question was that the length, difficulty and cost of the journey were disincentives to repeat visitation. However, over half (23) of those making this

comment were visitors from overseas⁶, and the majority of these commented on the distance from home or the likelihood of revisiting New Zealand rather than on the difficulty of the journey to Lake Waikaremoana once in New Zealand. Of the domestic visitors who commented on the journey as a disincentive to revisiting the area, around half commented on the quality of the road into the area, while the other half commented on the distance travelled from home.

The most commonly cited factor attracting respondents to return to the area was a desire to do more walking or tramping. Of the 31 people who said they would like to do more tramping in the area, 7 specifically mentioned a desire to do the Great Walk.

Ten respondents commented that they would like to come back to show the area to friends or relatives who have not yet visited or to make sure their children revisited at an age when they will be able to remember the area into adulthood.

3.3 Classifying visitor types

This section introduces three new visitor classifications: discovering visitor, familiar visitor, and attached visitor. These classifications were derived from analyses of motivations for visits to the area and may also have currency in other similar holiday destinations around New Zealand.

Each respondent has been attributed to a group according to a combined analysis of:

- ? number of previous visits to the area
- ? motivations for visiting the area this time
- ? probability of returning to the area in future
- ? factors likely to influence future decisions to return to the area

The classifications are designed to distinguish between visitors with different experiences of the region and different levels of personal connection to it.

The classification includes a degree of subjectivity as the inclusion of qualitative data leads to difficulties in defining the exact boundaries between discreet groupings. However, classification was performed systematically with codes used to assess the qualitative answers as far as possible. For example, the factors likely to influence future decisions to return were coded as follows:

Code	Qualitative answer includes:
0	Either a description of what the respondent sees as a serious obstacle to coming back OR a strong desire to explore other places, which suggests a return visit is very unlikely.
1	A description of one or more negative factors suggesting the respondent considers a return visit to be difficult or unlikely.
2	A description of one or more positive factors suggesting the respondent

⁶ Two respondents considered 'from overseas' here are considered domestic elsewhere in the survey. They both reported living in New Zealand at the time of the survey but were expecting to move overseas to live before being likely to visit the Lake Waikaremoana area again. They both commented on the distance from their prospective overseas homes to Lake Waikaremoana rather than on the distance from their New Zealand homes.

- considers a return visit to be desirable.
- 3 An indication of a strong desire to return, possibly including a sense that the respondent has already started planning a future trip.
 - 4 An indication that visitation is habitual or traditional and that return visits are seen as a certainty rather than a possibility.

The consistency with which this classification highlights differences between the behaviours of different groups improves confidence in the methodology.

Discovering visitors

There is a group of ‘discovering visitors’ who have a limited history of visits to the area; none had visited the area more than twice before and half of those who had been before either visited more than 10 years ago (and up to 50 years ago) or on the previous visit had driven through the region but not spent any time there. Most respondents in this group would like to visit the area again but see distance and road quality as disincentives. While members of this group were keen to do more tramping in this area, they mentioned there were numerous other destinations they would also like to visit, which might dissuade them from revisiting the area. The respondents in this category showed little personal connection to the area and discussed the difficulties of visiting more often than did other respondents.

Of the 191 respondents to the survey, 98 fall in this category, which includes 38 of the 45 international visitors.

Forty-eight percent of discovering visitors visited in Week 1 of the survey.

Familiar visitors

Most ‘familiar visitors’ have been to the area once or twice before (some had been as many as six times) and are very likely to return. However, this group also includes a number of respondents visiting the area for the first time, most of whom were accompanied by people who had been to the area before. These first-time visitors expressed a connection to the area through the previous visits of their companions or through their own likely future visits. Although in a sense these respondents were exploring an area new to them, they already had a level of familiarity and connection that separated them from the ‘discovering visitors’.

On average, familiar visitors stay, a little longer than discovering visitors and live a little closer⁷. They are keen to introduce other people to the area and are less concerned about the difficult driving conditions in the area than are discovering visitors. While most visitors in this category show little personal connection to the area compared with discovering visitors, they focus more on the positive attributes of the area rather than on the difficulties of visiting or the desire to visit other destinations. A small number of visitors in this category did discuss concepts like ‘nostalgia’, ‘fond memories’ and ‘for old time’s sake’ when talking about their motivations.

Of the 191 respondents, 44 fall into this category, which includes 5 of the 45 international visitors.

Fifty percent of familiar visitors visited in Week 1 of the survey.

⁷ Proximity of normal place of residence calculations include domestic visitors only, so in this case familiar domestic visitors live closer to Lake Waikaremoana than do discovering domestic visitors.

Attached visitors

Finally there are the ‘attached visitors’, most of whom have visited numerous times (mean number of visits is 40) and who definitely intend to return. These respondents, on average, stay longer and live closer than either of the other two visitor categories. Many return for the same reasons each time and were unable to define particular factors that would influence whether they would choose to visit again.

A number of the visitors in this category expressed clear personal connections to the area. For example, one respondent explained that it is important to him that his children visit the area until they are old enough to be able to remember it as adults. Two other respondents mentioned buying property in the area. A number of the respondents in this category spoke of tradition, or habit or that they’d ‘*been coming here for years*’.

Of the 191 respondents, 48 fall into this category, which also includes 2 of the 45 international visitors.

Sixty-three percent of attached visitors visited in Week 1 of the survey.

Characteristics of different visitor types

Table 11 shows some of the characteristics of the different types of visitors.

Table 11: Characteristics of different visitor types

Visitor Classification	Number of international visitors	Number of domestic visitors	Mean length of stay (in nights)	Number of visitors in Week 1	Number of visitors in Week 2	Number of visitors
Discovering	38	60	3.1	47	51	98
Familiar	5	39	4.0	22	22	44
Attached	2	46	5.5	30	18	48
All visitors	45	145	3.9	99	91	190

Discovering visitors were least likely to be visiting the area in Week 1; attached visitors were most likely to be doing so. The reason for this differing visitation pattern may be related to the availability of accommodation. The motor camp managers were clear that many people booked their peak season accommodation years in advance, and surveyors did note that on a number of occasions people were turned away from the motor camp because it was full. A shortage of accommodation may allow the attached visitors a better chance of visiting in the peak season as it could be expected they know their intentions further in advance and are able to make early accommodation bookings. While information was collected on some accommodation bookings⁸ there are insufficient data for each group (visitor classification and sample week) to allow a meaningful assessment of whether attached visitors made

⁸ See section 3.5, ‘Accommodation’.

bookings for the peak season further in advance than did other groups. However, if accommodation was scarce it could be expected that mean length of stay might be reduced as visitors became unable to secure accommodation for consecutive nights. The mean length of stay was similar in Week 1 (4 nights) and Week 2 (3.7 nights), suggesting seasonal pressure on accommodation availability is limited. Further work would be needed to determine the reasons for the different visit timing of the different groups.

In their work on tourists' information search behaviour, Gursoy and McCleary comment that:

...those who have been to a certain destination several times are likely to use more attributes to describe site choice decisions and are more likely to describe site attributes with more specificity than those who have never been to the destination. (Gursoy & McCleary 2004)

In this study, however, the level of detail recorded for destination choice was largely consistent across visitor categories. This consistency may, to some extent, be a function of the research tools used. Responses to the questions were written down by the surveyor as respondents answered. The amount of detail recorded by surveyors is likely to be influenced by how fast they were able to write and how quickly respondents wanted to complete the survey. Some detail may therefore have been lost in the on-site transcription of responses.

Although the level of detail given by respondents when talking about destination choice was similar across categories, attached visitors spoke more about their connection with the place than about the place itself. For example, where a familiar visitor said he came to the area

because of the lake, for kayaking,

an attached visitor personalised a similar sentiment, saying, *such great lakes; I love swimming and rowing on these lakes.*

Attached visitors explained fewer factors influencing their decision to return than did other visitor types. Discovering visitors and familiar visitors often gave different reasons for the current visit and for future visits; for example, one respondent said he had made the current visit because:

I hadn't been here, had always wanted to (heard it was pretty, a NZ treasure). Doing East Cape trip and so it was convenient. A good way to get into the Urewera area.

When asked about future visits he said:

I'd like to come back and do the Great Walk. This time we came on an off-chance, it was spontaneous. I'd like to come back and plan to do more tramping.

In many cases, when asked what would influence their decision to return, attached visitors replied that future decisions would be based on exactly the same factors as formed their reasons for the current visit. Attached visitors seemed to differentiate much less between the motivations for the current and subsequent visits than did discovering or familiar visitors.

Table 12 below summarises, by visitor classification, the most commonly mentioned motivations for visiting, as well as factors likely to influence future decisions to return to the area.

Table 12: Motivations for visiting by visitor classification

Discovering Visitors (n = 98)	Reasons for visiting	
	Recommendation (from a person, guide book, leaflet, etc.)	(50 instances)
	Wanted to go tramping	(26 instances)
	Never been before	(23 instances)
	To see or experience the lake, bush or nature	(18 instances)
	Factors in decision to return	
	Concerns over long distance or poor road quality	(39 instances)
	Want to do more tramping here	(18 instances)
	Other areas to see elsewhere	(12 instances)
	Like that it is quiet and relaxing/remote and uncrowded	(10 instances)
Familiar Visitors (n = 44)	Reasons for visiting	
	To revisit after a number of years away or to bring a new visitor	(13 instances)
	Group trip (did not choose destination)	(11 instances)
	Wanted to go tramping	(9 instances)
	Like that it is quiet and relaxing/remote and uncrowded	(9 instances)
	Factors in decision to return	
	Want to do more tramping here	(10 instances)
	Like that it is quiet and relaxing/remote and uncrowded	(8 instances)
	Want to go boating (includes motor boating, kayaking and row boating)	(5 instances)
	Like the beauty and scenery of the area	(5 instances)
Attached Visitors (n = 48)	Reasons for visiting	
	Like that it is quiet and relaxing/remote and uncrowded	(17 instances)
	Have been many times before	(16 instances)
	To go hunting or fishing	(14 instances)
	It is a generally nice place	(12 instances)
	Factors in decision to return	
	Like that it is quiet and relaxing/remote and uncrowded	(8 instances)
	It is a generally nice place	(5 instances)
	Want to do more tramping here	(3 instances)
	Would like to introduce someone else to the area	(3 instances)

3.4 Travel and planning

This section, which covers a range of issues relating to travel and trip planning, summarises the range of transport modes used to access the area and then explores route choice, single and multiple destination visits, and pre-visit information use. An analysis of whether respondents chose the quickest travel routes into and out of the region is included, as is a summary of common pre- and post visit destinations that may be useful for development of en route marketing strategies.

Transport mode

Respondents to the survey were asked which mode of transport they used to travel into the region and which mode they were intending to use when leaving. All respondents were using the same mode for their journeys into and out of the region. The modes used are shown in Table 13 below.

Table 13: Transport modes used by respondents to access the region

Mode of transport	Number of respondents	Percentage of respondents
Private vehicle	157	82
Car	138	72
Campervan or motorhome ⁹	16	8
Motorbike	2	1
Bicycle	1	1
Rental vehicle	34	18
Car	21	11
Campervan or motorhome ⁹	7	4
Van or minibus (group)	6	3
Total	191	100

Eighty-two percent of respondents were using privately owned vehicles, and the remaining 18% were using rented ones. No respondents reported using public transport, although several (anecdotally) reported that they would have used public transport but had been unable to find any.

Table 14 shows that 141 domestic visitors (97%) travelled to the area in private vehicles. Only one domestic respondent had travelled in a rental car; 4 others were travelling with groups in rental vans or minibuses.

Table 14: Private and rental vehicle use by domestic and international respondents

Origin	Number of respondents using private vehicles	Number of respondents using rental vehicles
Domestic	141	5
International	16	29

⁹ These data are estimated. Initially respondents travelling in a campervan or motorhome were not asked to specify whether it was a private or rental vehicle. The surveyors realised the shortcoming of this approach and began to collect this information approximately halfway through the survey. Information was collected for 12 of the 23 vehicles reported. For the remaining 11 vehicles, rental or ownership status has been estimated based on visitor origin, and trip characteristics compared with those for whom vehicle status is known.

Total	157	34
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Of those international visitors surveyed, 29 (64%) travelled into the area in rental vehicles. Visitors who were staying in the country longer were more likely to be travelling in a private vehicle, while visitors on shorter stays were more likely to be travelling in a rental vehicle. While international visitors were spending a median of 33 nights in New Zealand, international visitors travelling in private vehicles were spending a median of over 90 nights in New Zealand. Private vehicles included both those owned by the respondents themselves and those borrowed from or shared with hosts who are normally resident in New Zealand.

Travel route

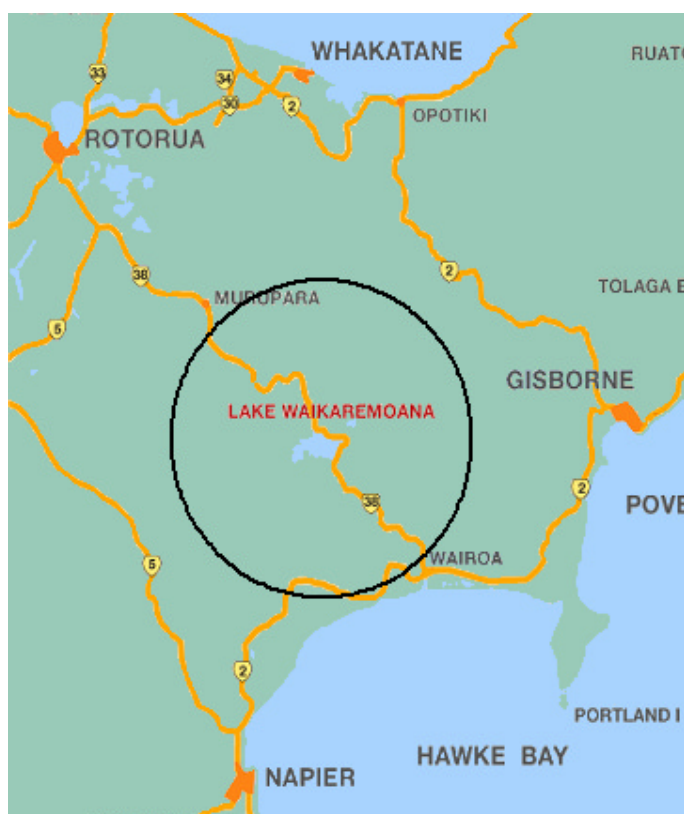
State Highway 38 (SH38) is the main road through the Lake Waikaremoana area between Murupara (to the northwest of Lake Waikaremoana) and Wairoa (to the southeast) (Map 2)¹⁰. Towards Murupara the road is narrow, winding, and unsealed in most places; towards Wairoa, while still a rural road, it is sealed in most places and is slightly wider and less winding. It takes under 1 hour to drive from Wairoa to Lake Waikaremoana but it takes around 2.5 hours to drive from Murupara to Lake Waikaremoana.

Survey respondents were shown a copy of Map 2 and asked which route they would use to enter and leave the Lake Waikaremoana area.

Q: Which road did you use to get in to this area?

Q: Which road will you use to leave this area?

¹⁰ State Highway 38 extends from near Rotorua to Murupara and then from near Lake Waikaremoana on to Wairoa. The section between Murupara and Lake Waikaremoana (approximately 84 km) is not actually considered part of the State Highway (Transit New Zealand 2006); however, for ease of reference, the entire road is referred to here as State Highway 38.

Map 2: Road access to Lake Waikaremoana

While most visitors come from further afield than Murupara and Wairoa, this section of the journey was most often commented on by respondents to the survey, with most comments focussing on the difficult driving conditions.

Each of the 191 respondents to the survey made two access journeys along SH38, one to travel into the area and one to leave. Of the access journeys made and reported¹¹ 59% were through Wairoa and 41% were through Murupara; 70% of respondents were intending to use the same route to leave the region as they had used to enter it.

Not surprisingly, the most popular route was the round trip route through Wairoa – which avoids the more difficult driving conditions of the road north towards Murupara.

Table 15: Return routes used by respondents to access Lake Waikaremoana

Return route	Number of respondents using route	Percentage of respondents using route
Wairoa Return	83	44
Murupara Return	48	25
Wairoa to Murupara	40	21
Murupara to Wairoa	18	10
Total ¹²	189	100

Respondents were also asked where they had spent the night before their visit to the Lake Waikaremoana area and also where they were intending to spend the night after their visit.

¹¹ One respondent did not answer the question on travel routes, and one respondent was unsure which route she would take to leave the area. Percentages reported in this section exclude the instances in which routes were not reported.

¹² Two respondents are not included in this table as they did not supply all the data required for inclusion.

Q: Where did you spend the night before your arrival in the Lake Waikaremoana area?

Q: Where will you spend the next night after you leave the Lake Waikaremoana area?

Of the respondents, 92% took the quickest route from where they stayed the night before their visit and were also planning to take the quickest route to where they were intending to stay the night after their visit¹³. Eight percent of respondents took the longer route for at least one access journey. Of these respondents, 5% took the longer route into the region and the quicker route out; 3% took the quicker route into the region and the longer route out.

One respondent appears to have taken the longer route when both entering and leaving the area. This was the domestic respondent who had travelled the furthest to get to the area and it is possible that (while the respondent *arrived* at Lake Waikaremoana by car) her journey may have included air travel. This would mean the choice of route was made on factors, such as airport location, which may not have been relevant to other visitors.

Most respondents who took a longer route for one of their access journeys either opted to make the return journey from Wairoa (the easier road) (7 respondents) or to leave in the opposite direction from which they had arrived (allowing them to travel the entire length of the road rather than doubling back) (7 respondents). Only one respondent opted to take a longer route for one of his access journeys and complete the return trip through Murupara. The respondents who had taken a longer route than was necessary did not offer any explanation for this decision¹⁴.

Of the visitors who opted to take the return route through Wairoa when that was not the quickest route, 4 out of 7 were international visitors in rental vehicles. International visitors may be less confident about driving on unsealed roads than are domestic visitors. Of the international respondents to the survey 76% came from countries with no unpaved roads (CIA 2006). In addition a number of rental vehicle companies place restrictions or insurance conditions on the use of their vehicles on unsealed roads. The route to Lake Waikaremoana via Murupara includes considerable unsealed stretches; avoiding these is likely to be a significant motivation for taking a longer route via Wairoa.

Of the 15 respondents who opted to take a longer route in one direction 9 fall into the discovering visitor classification, while 5 were familiar visitors and 1 was an attached visitor. Anecdotal evidence from the surveyors suggests some discovering and even familiar visitors were quite surprised by the difficult driving conditions along SH38. It may be that a lack of detailed knowledge of road

¹³ 'Route' here refers only to whether the respondents indicated travelling through Wairoa or through Murupara – it does not include an analysis of the precise route used. Mapping software was used to derive the quickest route (in minutes) from other locations via Wairoa to Lake Waikaremoana, and the quickest route from those same locations via Murupara to Lake Waikaremoana. For each location, the quicker of the two routes (Wairoa or Murupara) was determined to be the quickest route. The shortest route (in kilometres) from each origin via Wairoa and via Murupara to Lake Waikaremoana was also derived. In all but one case the shortest route was also the quickest route. For journeys between Wanganui and Lake Waikaremoana, it is calculated to be *quicker* to travel via Wairoa (326 minutes instead of 332 minutes via Murupara) but a *shorter distance* to travel via Murupara (418km instead of 432km via Wairoa). Both respondents who travelled between Wanganui and Lake Waikaremoana travelled via Wairoa, therefore selecting the quicker route rather than the shorter route.

¹⁴ The decision was not queried by surveyors as it was not always clear that a longer route had been chosen until after the survey when the journey was plotted on a map.

conditions leads discovering and familiar visitors to make different choices about their travel route than the choices made by those more used to the conditions.

Visitors who have been to the area only a small number of times (and so are likely to fall into the discovering or familiar categories) may also be more likely to take a longer route because they are keen to see the scenery along the entire length of the road, whereas attached visitors may consider the journey more as simple transport than as sightseeing. This hypothesis is supported by a finding from a later question. Respondents were asked which activities they would be doing during their visit.

Q: Which of the following activities will you be doing in the Lake Waikaremoana area during this visit?

One of the items in the list shown to respondents to help them answer this question was 'scenic drive'. Around half of all discovering visitors (46 respondents, 47%) and half of all familiar visitors (24 respondents, 51%) reported having been on, or intending to go on, a scenic drive in the area. Only just over a quarter of attached visitors (12 respondents, 27%) reported going on a scenic drive. Discovering and familiar visitors were therefore much more likely than attached visitors to report going on a scenic drive, which supports the hypothesis that these visitors may choose to take a longer journey than is necessary to allow them to view the scenery. It should be noted, however, that there may have been some inconsistencies in respondent interpretation of this question; while some respondents considered the journey into the region a scenic drive; others only reported going on a scenic drive if they had been on a vehicle excursion where the main or only purpose was viewing the scenery.

Eleven of the 15 visitors who opted to take a longer route in one direction visited during Week 2. It is unclear why visitors in Week 2 were more likely to take a longer route to Lake Waikaremoana than those in Week 1 but this may relate to the differing proportions of international and discovering visitors in the different survey periods. It may also relate to the different age breakdowns in the different survey periods and the difficulty of making long journeys with children. Forty-five (24%) of the respondents surveyed were travelling with at least one child under the age of 14, whereas only 1 (7%) of those who had chosen to take one longer route than necessary was travelling with a child under the age of 14.

While weather may also play a part in determining choice of route, particularly on unsealed rural roads, the weather is not thought to have adversely affected the samples discussed in this report as the weather was fine in both survey periods.

Interestingly, Wairoa was the quickest route for 63% of visitors journeying into the region, but was the quickest route out of the region for only 53% of visitors. This suggests more visitors to Lake Waikaremoana travel south to north, than travel north to south. In the absence of any evidence of a general northerly flow of visitation in the wider area, this perhaps suggests that ease of access to Lake Waikaremoana is more important in influencing decisions to visit than is ease of exit.

This hypothesis is supported by the observation that those respondents who travelled from Murupara to Wairoa stayed slightly longer in the area, on average, than did those who travelled from Wairoa to Murupara. This might indicate that a longer stay is needed to justify the more difficult entry journey. Similarly, those who made the return journey from Murupara stayed slightly longer than those who made the return journey from Wairoa. Those respondents who opted to travel the length of the road (Murupara to Wairoa or Wairoa to Murupara) stayed in the region for fewer nights, on average, than did those respondents who made a return journey from either Wairoa or Murupara; this may reflect a difference between those visitors who are 'passing through' the area visiting a series of destinations, compared with those for whom Lake Waikaremoana is the only or main destination. Table 16 shows the mean length of stay for respondents who used different travel routes.

Table 16: Respondents' mean length of stay by travel route

Travel route	Respondents' mean length of stay
Murupara Return	4.6
Wairoa Return	4.3
Murupara to Wairoa	3.0
Wairoa to Murupara	2.7

Further work to determine the impact of different road qualities, distances and visitor characteristics on destination, route choice and length of stay would be useful.

Lake Waikaremoana as part of a longer trip

Referring to tourism operations in Southland (another rural New Zealand destination) Stuart and Pearce note that the volume of bookings by independent travellers¹⁵ for attractions and activities 'appears to increase as visitors get closer to the destination' (Stuart et al. 2005). Understanding the flow of tourists through the Lake Waikaremoana region could help local businesses capitalise on opportunities to attract tourists into the area and into their businesses. For example, a backpacker hostel in Wellington has developed a strategy of distributing promotional material to visitor information centres and other hostels within one day's travelling radius of Wellington (Pearce et al. 2004).

When asked where they had spent the night before and where they were intending to spend the night after their visit to the Lake Waikaremoana area, 48% of domestic visitors reported spending both the night before and the night after their visit at home; for the remaining 52% of domestic visitors the Lake Waikaremoana visit was part of a longer trip including at least one night elsewhere. No international visitors were spending the night before, or the night after, their visit to Lake Waikaremoana at home.

When broken down into the visitor classifications explained in the section 'Classifying Visitor Types' it is clear that attached visitors are the least likely to include Lake Waikaremoana as part of a longer trip whereas discovering visitors are the most likely to do so (Table 17).

Table 17: Lake Waikaremoana as part of a longer trip by visitor classification

Visitor classification	Percentage of respondents visiting just Lake Waikaremoana	Percentage of respondents including Lake Waikaremoana as part of a longer trip
Attached	67	33
Familiar	41	59

¹⁵ Tourism New Zealand defines independent travellers as "Travellers who make their own arrangements and devise their own itineraries" (TNZ 2006). Tourism supply in the Lake Waikaremoana area is characterised by very small-scale commercial operations and the remoteness and lack of development in the area are seen as prohibitive by many tour operators. Most visitors to the area are independent travellers.

Discovering	19	81
Total	36	64

Table 18 and Table 19 show the most common locations in which respondents reported spending the night before and the night after their visit to Lake Waikaremoana. (The tables include those respondents who spent the night at their home in the locations listed, as well as those who were visitors in those locations.) It should be noted that 12 of the 13 respondents staying in Havelock North the night before their visit to Lake Waikaremoana and 6 of the 13 respondents staying in Mahia the night after their visit to Lake Waikaremoana were part of a Rotary Club caravanning trip that members were welcome to join and leave at any point¹⁶. Havelock North and Mahia would not appear in such prominent positions in these tables were members of the caravan club excluded from this analysis.

Table 18: Popular pre-visit destinations by visitor classification

Location	Number of attached visitors	Number of familiar visitors	Number of discovering visitors	Total number of visitors
Napier	1	3	14	18
Rotorua	2	3	12	17
Havelock North	1	4	8	13
Wairoa	1	6	4	11
Gisborne	2	0	6	8
Hastings	0	1	5	6

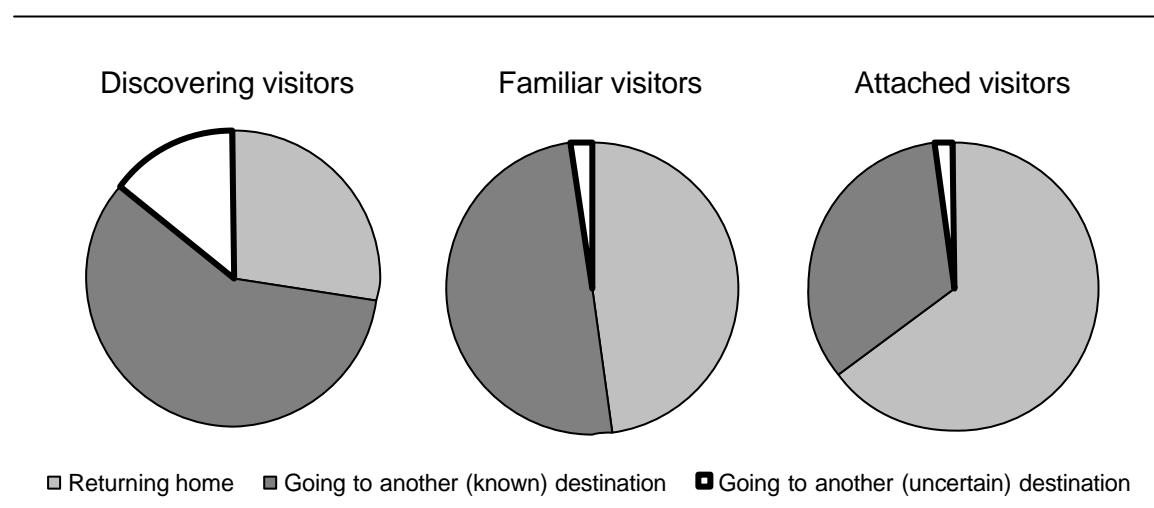
Table 19: Popular post-visit destinations by visitor classification

Location	Number of attached visitors	Number of familiar visitors	Number of discovering visitors	Total number of visitors
Unsure	1	1	14	16
Gisborne	4	1	10	15
Mahia	2	2	9	13
Rotorua	1	4	7	12
Wairoa	0	3	5	8
Napier	1	2	4	7

¹⁶ Travel parties were defined as groups who had travelled together from the same place and were travelling on together to the same place after their visit. As caravan club members were free to join and leave the group at any time, and did not travel together, the members were not considered part of a single travel party. This strategy allowed more than one member of each large group to be surveyed without double counting the total number of visitors present.

Sixteen visitors were not sure where they would be spending the night after leaving the Lake Waikaremoana area. This suggests these visitors have flexible itineraries and are willing to make decisions as they travel. While 10 of the visitors who were unsure where they would be spending the night after leaving the Lake Waikaremoana area were international visitors, only 6 were domestic visitors. Discovering visitors accounted for 14 of the 16 visitors who were unsure about where they would be spending the night after their visit to Lake Waikaremoana. The charts below illustrate that discovering visitors are the least likely to return straight home after their visit to Lake Waikaremoana, and are the most likely to be uncertain about the next section of their trip.

Chart 5: Post-visit plans by visitor classification



Pre-visit information use

Respondents to the survey were asked which information sources they had used while planning their trips.

Q: What information sources (if any) did you use when planning the Lake Waikaremoana part of your trip?

Guide book

Brochure

Information centre

Travel agent

Internet

Newspaper or magazine article

Newspaper or magazine advert

Telephone directory

Recommendation from friends or family

Recommendation from accommodation provider

Other personal recommendation

Other¹⁷

¹⁷ Responses to the 'Other' category included weather forecasts, maps and books. Some respondents who were visiting on organised group trips reported that information had been provided to them by the group organisers; these responses are not included in figures below showing how many people had consulted information sources

Respondents were able to give more than one answer. Of the 190 visitors who answered this question, 57 had not used any information sources to plan their trip to the Lake Waikaremoana area. Table 20 shows the most popular information sources used by discovering, familiar and attached visitors.

prior to their trip. Those respondents on group trips who had consulted information sources other than those provided directly by the group are included in the figures below.

Table 20: Most popular information sources used by visitor classification

Information source	Discovering visitors (n=98)	Familiar visitors (n=44)	Attached visitors (n=48)	Total visitors (n=190)
Guide book	51	8	8	67
Information centre	41	8	6	55
Recommendation from friends or family	40	8	4	52
Brochure	29	12	8	49
Internet	34	7	5	46
Telephone directory	2	2	4	8

Of the 98 discovering visitors (89%), 87 had used at least one information source when planning their trip. Guide books were the most popular information source for discovering visitors, with 51 respondents reporting having used one. Forty-one discovering visitors had used an information centre, 40 had received a recommendation from friends or family, 34 had used the internet, and 29 a brochure.

Of the 44 familiar visitors (55%), 24 had used at least one information source when planning their trip. Twelve familiar visitors used a brochure, 8 used a guide book, and the same number used an information centre or received a recommendation from friends or family. Seven familiar visitors had used the internet.

Of the 48 attached visitors (46%), 22 had used at least one information source when planning their trip. The most popular information sources used by attached visitors were guide books and brochures. Eight attached visitors reported having used guide books and 8 reported using brochures. Two of the respondents using brochures specified they had used walks brochures, and one said she had used a brochure, which she had picked up the previous year, to find the telephone number for her accommodation booking. Information centres were used by 6 attached visitors, the internet was used by 5 attached visitors, and each of telephone directories and recommendations from friends were used by 4 visitors. It was somewhat surprising that visitors who have been to the region many times before¹⁸ are not relying on their own knowledge to plan their trips; however, phone books, brochures, guide books, the internet and information centres can all be used to track down practical details such as phone numbers, details of routes for particular walks, and information on current weather and conditions. The references to recommendations from friends were not queried with respondents at the time and it is somewhat confusing that attached visitors were reporting they had received recommendations from friends. It may be the case that these recommendations were very specific in nature, such as recommendations for a particular picnic spot, a particular time to visit or detailed information on current hunting or fishing conditions, but this cannot be ascertained from the data collected.

¹⁸ The mean number of previous visits for attached visitors was 40.

The mean number of information sources used by all respondents who had used at least one source was 2.4. The mean number of information sources used by each discovering visitor (who used at least one source) was 2.6, by each familiar visitor 2.2, and by each attached visitor only 1.9.

The majority of discovering visitors consulted at least one information source. Fewer familiar visitors consulted at least one source, and those who did on average consulted fewer sources than did discovering visitors. Less than half of the attached visitors consulted at least one source, and those who did consulted fewer sources than either discovering or familiar visitors. This is shown in Table 21..

Table 21: Use of information sources by respondents of different visitor classifications

Visitor classification	Percentage of respondents using at least one information source	Average number of information sources used per respondent
Discovering visitors	89	2.6
Familiar visitors	55	2.2
Attached visitors	46	1.9
All visitors	70	2.4

As well as differences between the information sources consulted by discovering, familiar and attached visitors, there are also differences between the information sources used by international and domestic visitors: 56 of the 57 visitors who had not used any information sources were domestic visitors; of the international visitors, all except one had used at least one information source in planning their trip. Table 22 shows the percentage of international and domestic visitors using each of the information sources shown.

Table 22: Most popular information sources used by visitor origin

Information source	Percentage of international visitors using source (n=45)	Percentage of domestic visitors using source (n=145)	Percentage of all visitors using source (n=190)
Guide book	82	21	35
Information Centre	47	23	29
Recommendation from friends or family	33	25	27
Brochure	33	23	26
Internet	31	22	24

Of the international visitors, 82% used a guide book in planning their trip, compared with only 21% of domestic visitors. Guide books were clearly the most popular information source for international visitors, followed by information centres. Recommendations from friends, brochures and the internet were all used by about a third of international visitors. Between 20 and 25% of domestic visitors used each of guide books, information centres, recommendations from friends, brochures and the internet.

A number of surveys have studied the use visitor make of information sources in New Zealand and some quite different results have been obtained. It is difficult to make a precise comparison of the

different data presented on information source use as the different surveys use different methods, categories and data presentation. However, some ordinal analysis can be completed.

Some of the differences between the different results obtained by different surveys may be related to different surveying techniques and the difficulties tourists seem to have in answering questions on information sources. A surveyor for a previous part of the Te Tapoitanga Maori programme noted that even when she was surveying people coming out of an information centre, some respondents did not mention their use of the information centre until she specifically asked them about it.

There may also be differences in the information sources used by visitors according to the destination being visited; for example, Lake Waikaremoana is included in very few organised tours or packages and this is likely to be one of the reasons why very few people (1 respondent to this survey) received information on the area from travel agents or tour operators, although some respondents did receive information from the organisers of trips, such as the Rotary Club caravanning trip mentioned above.

Some researchers have noted differences between the sources used to gain information for different aspects of a visit, for example, accommodation, transport and activities (Pearce & Schott 2005). When a general question on information sources (not broken down into accommodation, transport, etc.) is asked, the order of the questions in the survey may influence which parts of their trip respondents are thinking about when they answer the question on information sources.

The question on information sources in the Lake Waikaremoana survey followed a question on main reasons for visiting the area and, before that, a question on activities being undertaken during the trip (the full questionnaire is shown in Appendix 1). The four most popular information sources for visitors to Lake Waikaremoana (guide book, information centre, recommendation, and brochure) were the same as those mentioned by visitors surveyed by Pearce and Schott when asked about information sources used to find out about attractions. When asked about information sources used to find out about accommodation or transport the visitors surveyed by Pearce and Schott chose a different selection of information sources (in particular giving higher priority to the internet and to travel agents) to those selected by the visitors to Lake Waikaremoana. Visitors to Lake Waikaremoana might have mentioned different information sources had they been separately asked about the information sources used to plan different aspects of their holiday. Similarly, had the visitors to Lake Waikaremoana been asked a question about accommodation or transport immediately before being asked about information sources they might have remembered using different sources from the ones they mentioned when they had just answered questions about activities.

Despite the differences between the results produced by different surveys, international visitors are consistently shown to rely heavily on guide books, while domestic visitors are more likely to favour the internet as an information source (Pearce & Schott 2005; RVM 2006; Wilson et al. 2006; Doherty 2006). Domestic respondents in Lake Waikaremoana (this survey and Doherty 2006) are shown to be more likely to use recommendations from friends or relatives and less likely to use the internet than are most domestic respondents to other surveys. This may be a function of the lack of information available on the internet relating to the Lake Waikaremoana area or it may relate to a lack of availability of internet access in destinations that domestic visitors visit on their way to Lake Waikaremoana. It may also be that visitors to Lake Waikaremoana have lower rates of home internet access than is the norm for domestic visitors within New Zealand; this is beyond the scope of this study.

While this survey does not show exactly the same patterns of information use as others published it does contribute to the build-up of a picture of differences and similarities between the information sources used under different circumstances.

Stuart, Pearce and Weaver (2005) suggest that distribution channel use (which includes pre-visit information access) is more a function of business size and resources and the tourist types being

targeted than of the destination itself. Businesses in the Lake Waikaremoana area are small and have limited resources. Tourism in the area is mostly comprised independent visitors (due partly to a lack of access and facilities for tour groups and other non-independent visitors). This survey has considered the information search and booking behaviour of visitors to Lake Waikaremoana in some detail and it should be noted that these findings may well be applicable to other destinations characterised by small businesses and independent visitors. The findings may also be applicable to similar groups of visitors and businesses even when they are found in bigger destinations that are also host to other types of businesses and visitors.

3.5 Accommodation

This section presents data on respondents' accommodation choices and on pre-visit accommodation booking behaviour; it shows that younger visitors and international visitors may have more flexible itineraries than older visitors and domestic visitors, and that domestic visitors book their accommodation further in advance than do international visitors. The section also looks at the accommodation choices respondents say they would make if a wider range of accommodation was available in the area.

Available accommodation

There is a limited range of accommodation available in the Lake Waikaremoana area. The following is a brief description of some of the accommodation facilities used by respondents to the survey.

Lake Waikaremoana Motor Camp – Situated on the shore of the Lake and just under 2 km from the DOC visitor centre at Aniwanui, the motor camp offers a variety of chalets, cabins and units, as well as powered and non-powered sites for caravans, campervans and tents. As well as a small shop, the motor camp offers a communal kitchen and dining room, laundry facilities, public telephones, toilets, and hot showers. Homebay Water Taxis, offering transport around Lake Waikaremoana, is based at the motor camp. The motor camp is owned by the Department of Conservation but is managed under contract to DOC by a husband and wife team. Homebay Water Taxis is operated under a separate concession. Lake Waikaremoana Motor Camp is shown separately from other DOC facilities due to its size and importance in the local accommodation sector.

DOC Facilities – There is a variety of DOC facilities around the Lake and nearby. Some of the more popular facilities include Mokau Landing camping area (a standard DOC campsite, on the shore of the Lake, with water taps, toilets, mown grass and vehicle access), and Sandy Bay Hut (the hut is popular with walkers and has bunks, mattresses, water, toilets, and heating; it is not accessible by road).

Free camping – Informal camping outside the campsites provided is allowed within the National Park except where in conflict with bylaws or the park management plan. The few restrictions that are placed on free camping are intended to minimise ecological damage and to facilitate DOC management of the impacts of free camping.

Big Bush Holiday Park – Situated between Lake Waikaremoana and Tuai (about 10 km from the DOC visitor centre) the holiday park has cabins, accommodation for backpackers, and tent sites. Big Bush has a restaurant and licensed bar (which are available to overnight guests and evening visitors, although may not be open every day and may require advance booking). Big Bush can also help with transport arrangements both into the region and to local attractions including the Great Walk.

Lake Whakamarino Lodge – Lake Whakamarino Lodge is located on the shores of Lake Whakamarino in Tuai (around 12 km from the Lake Waikaremoana Motor Camp). It has double, twin share and single rooms as well as two five-bed units. Rooms have shared bathrooms and showers, and the Lodge has a laundry, a dining room, a conference room, and guest access to a telephone, fax, and e-mail facility. Meals (including breakfasts, picnic or dining room lunches, dinners and barbecues) are available for guests.

Camp Kaitawa – This facility is available for group bookings. It is situated between Lake Waikaremoana and Tuai, approximately 7 km from the DOC visitor centre at Aniwaniwa. The Camp is run by a trust for the children of Hawke’s Bay and is primarily used as an accommodation centre for school groups. During weekends and school holidays the Camp is available for bookings by other groups such as tramping clubs. The camp has accommodation (in dormitories and chalets) for 56 people; it also has a kitchen and dining room, hot showers, and laundry and drying facilities.

Whirinaki Forest Lodge – Situated between Lake Waikaremoana and Rotorua, accommodation is in one of three fully self-contained units either with all meals provided or self-catering. Backpacker accommodation is also available and the Lodge can cater for groups of up to 16 people.

There are several other small facilities in the area including motel or marae accommodation, homestay and B&B facilities and a small number of holiday homes available to rent.

Accommodation choices

As noted in the Introduction, a large number of the respondents were surveyed at the Lake Waikaremoana Motor Camp and it is expected that there is an element of bias in the sample towards those staying in motor camp accommodation. However, there is a very limited choice of accommodation options in the area and the motor camp is by far the largest single accommodation site present. Confidence in the sample was also improved by the number of repeat encounters that were made of the same people in different locations.

Table 23 shows how many respondents were staying in each of the different types of accommodation available. Some respondents were intending to stay in more than one type of accommodation, and some respondents who had just arrived or had not planned their entire trip were unsure about where they would spend some nights.

There were 16 day trippers among the 191 respondents to the survey. Of the 175 overnight visitors, 137 were staying in only one type of accommodation¹⁹, 35 were staying in two types of accommodation, and the remaining 3 respondents were staying in three types of accommodation.

Of the 38 respondents who were staying in more than one type of accommodation, 27 were doing all or part of the Great Walk and 25 of these were staying in DOC facilities for some of their nights in the area and in other types of accommodation for the remaining nights. This suggests most visitors who choose to change accommodation type during their visit do so because they are obliged to use DOC facilities for nights spent on the Great Walk but choose other facilities for nights spent in the area before or after the walk.

Transport availability can also determine accommodation choices, with some respondents commenting that they had chosen their accommodation to take advantage of free drop-offs and pick-ups at the start and end of the Great Walk. One respondent commented that the transport he had arranged from the end of the Great Walk back to his accommodation had not turned up and he and his companions had had to make their own way back to Lake Waikaremoana. His party had been due to

¹⁹ Accommodation types are as listed in Table 23. Individuals staying in more than one DOC hut or campsite or in two different styles of accommodation at the Lake Waikaremoana Motor Camp are therefore considered to be staying in only one type of accommodation.

spend the night in accommodation provided by the same company as the transport that had failed to arrive but were in the process of trying to find an alternative as they were disappointed with the service they had received.

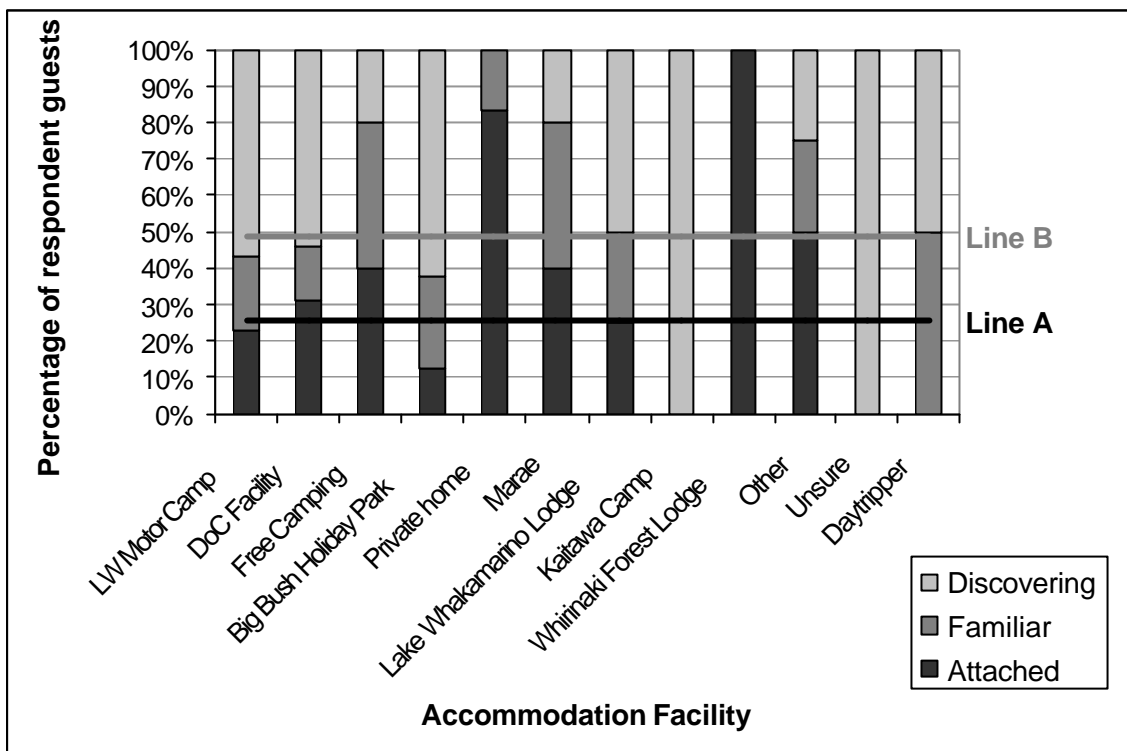
Table 23: Number of respondents staying in each type of accommodation

Accommodation facility	Number of respondents
Lake Waikaremoana Motor Camp	119
DOC Facility	52
Free camping	10
Big Bush Holiday Park	8
Private home ²⁰	6
Marae	5
Lake Whakamarino Lodge	4
Camp Kaitawa	2
Whirinaki Forest Lodge	2
Other	4
Unsure	4
Total	216

Several respondents reported they had made a change of accommodation because their first choice was not available for all of the nights that they were planning to spend in the area.

Chart 6 shows visitors by visitor classification and by accommodation type. Each bar on the chart represents one type of accommodation. The coloured segments within the bar show the percentage of visitors in that type of accommodation who are discovering, familiar or attached visitors. The two horizontal lines, Line A and Line B, show the visitor classifications of the sample as a whole. Twenty-five percent of the sample (the area under Line A) are attached visitors; 23% of the sample (the area between Line A and Line B) are familiar visitors; 52% of the sample (the area above Line B) are discovering visitors. If the proportion of discovering, familiar and attached visitors in each accommodation type matched the proportions in the survey as a whole, then the lines would coincide with the joins between the different coloured segments in the bars. Lake Whakamarino Lodge had almost the same proportions of discovering, familiar and attached visitors as the survey as a whole.

²⁰ 'Private home' includes holiday homes or baches either owned by the respondent, one of the respondent's companions or any other person who has allowed the respondent the use of the premises without making a charge for this.

Chart 6: Visitor classifications of respondents in different types of accommodation

Although the chart shows that both respondents staying at Camp Kaitawa were ‘discovering visitors’ and both those staying at Whirinaki Forest Lodge were ‘attached visitors’, it should be remembered that only two of the respondents to the survey were staying in each of these facilities and this may not be characteristic of overall visitation. Similarly, results for other facilities with small numbers of respondents should be treated with caution. More usefully, the chart shows that half the day trippers were familiar visitors and half were discovering visitors; none were attached visitors. It also shows that all the visitors who were unsure about where they were going to spend 1 or more nights were discovering visitors.

Attached visitors were proportionally more likely to be staying in a private home than were other types of visitors. Those individuals who have access to accommodation in private homes in the area (either through connections with family and friends or through having their own holiday home) are more likely to be frequent visitors. It seems less likely that attached visitors are more attracted to private homes than are discovering or familiar visitors.

Attached visitors were also proportionally well-represented amongst those who were free camping and those who stayed on a marae²¹.

²¹ Only 5 individuals, including 2 attached visitors, stayed on a marae. The small size of this group should be born in mind when considering the proportional results.

Of the 8 respondents spending at least 1 night at the Big Bush Holiday Park, 5 were intending to do all or part of the Great Walk. This high proportion of walkers among the clientele is likely to be related to the provision, by Big Bush, of transport to the ends of the Great Walk. Proportionally fewer attached visitors than other types of visitor undertake the Great Walk, and this may be a reason for the low proportion of attached visitors staying at Big Bush. It may also be the case that, as Big Bush is several kilometres from the shores of Lake Waikaremoana, the greater knowledge of the area held by attached visitors leads them to select other accommodation options in preference over Big Bush. As there were only 8 respondents who were spending at least 1 night at Big Bush these figures may not be representative of overall visitation.

Table 24 shows the mean ages of respondents staying in the different accommodation types²². Mean ages are similar for most accommodation types but it is interesting to note that those respondents who were unsure of their accommodation for 1 or more night were considerably younger than the mean for the whole sample (mean age of those who were unsure is 33, mean age for the sample as a whole is 47.7). This may suggest that younger people are more likely to be travelling with flexible itineraries than are older people; this is supported by the data on accommodation booking behaviours presented below. It is also interesting to note that those using DOC facilities are younger than the mean for the whole sample. This may be because a number of the DOC facilities are situated around the Great Walk and so attract young, fit trampers. The mean age of those staying in DOC facilities was 39.9 and the mean age of those doing all of the Great Walk²³ was 40.1.

Table 24: Mean ages of respondents in different accommodation types

Accommodation facility	Mean age of respondent guests
Lake Waikaremoana Motor Camp	49.8
Lake Whakamarino Lodge	49.5
Big Bush Holiday Park	48.8
Private home	48.0
Free Camping	45.9
Marae	45.8
Other	45.8
Daytripper	45.1
DOC Facility	39.9
Unsure	33.0
All respondents	47.7

²² Camp Kaitawa and Whirinaki Forest Lodge are excluded from this table as the small sample sizes (2 respondents each) are inappropriate for the calculation of averages. Some of the other accommodation types also have small sample sizes (from 4 to 10 respondents); averages are presented here for those accommodation types but should be treated with caution.

²³ Some respondents reported walking some of the Great Walk but did not complete the entire track. These respondents are not included here.

Accommodation bookings

Respondents were asked whether they had booked any of their accommodation in advance of their visit. This helps to provide information on the extent to which respondents are flexible once they reach the area. Accommodation for 66% of the nights that respondents intended to spend in the area was pre-booked.

The most commonly booked accommodation type was the Lake Waikaremoana Motor Camp, with 81% of those respondents intending to stay the night there having booked in advance. Other commercial facilities included Lake Whakamarino Lodge (71% booked) and Big Bush (62% booked).

Visitors who use DOC accommodation on the Great Walk have to book their accommodation before they start the walk²⁴ but most other DOC facilities do not have a booking system and operate on a 'first in' basis. As visitors to DOC facilities did not always know the name of the campsite or hut in which they stayed, it is difficult to separate visitors into those who stayed in accommodation where booking is required and those who stayed in accommodation for which booking is not available. For this reason figures for pre-booking DOC accommodation must be treated with caution.

Table 25: Percentage of nights pre-booked for each accommodation type

Accommodation facility	Nights spent	Nights pre-booked	Percentage of nights pre-booked
Marae	12	12	100
Camp Kaitawa	12	12	100
Lake Waikaremoana Motor Camp	441	358	81
Lake Whakamarino Lodge	7	5	71
Big Bush Holiday Park	13	8	62
DOC Facility	167	85	51
Other	12	5	42
Private home	20	2	10
Whirinaki Forest Lodge	2	0	0
Free camping	49	0	0
Unsure	6	0	0
All facilities	741	487	66

Those respondents who had booked their accommodation in advance were, on average, slightly older than those who had not. The average age of those who had booked all of their accommodation was 51.1 years, the average age of those who had booked some but not all of their accommodation was 45.4 years and the average of those who had booked none of their accommodation in advance was 44.3 years.

²⁴ Although some respondents commented that they booked their Great Walk accommodation at the visitor centre in Aniwaniwa after their arrival into the area and just before they began the walk.

We noted earlier that those respondents who were unsure about where they would be staying for part of their stay were considerably younger, on average, than the mean for the sample. The resulting suggestion that younger visitors may be travelling with more flexible itineraries than older visitors is supported by the finding that those who booked all their accommodation in advance were older than those who did not²⁵.

Table 26 shows that discovering visitors were more likely to have booked all their nights in the area (59% had done so) than were either familiar visitors (56%) or attached visitors (40%). However, attached visitors were more likely to have booked some, but not all their nights in the area than were either of the other two classes of visitor (attached =15%, familiar = 6%, discovering = 8%).

Table 26: Percentage of respondents booking accommodation in advance

Visitor Classification	All nights booked in advance	Some nights booked in advance	No nights booked in advance	All overnight visitors
Discovering	59	8	33	100
Familiar	56	6	39	100
Attached	40	15	46	100
International	30	16	53	100
Domestic	60	7	33	100
All overnight	53	9	38	100

Discovering visitors were more likely to book all their accommodation in advance than were familiar or attached visitors; however, international visitors (most of whom were discovering visitors) were less likely to book their accommodation than were domestic visitors. Only 30% of international visitors booked all their nights of accommodation in advance, whereas 60% of domestic visitors did so. Of the international visitors, 16% booked some but not all their accommodation in advance compared with only 7% of domestic visitors. Fifty-three percent of international visitors and 33% of domestic visitors booked none of their accommodation before arrival in the area. This perhaps indicates a willingness among international visitors to be more flexible and responsive with their arrangements than are domestic visitors. It may also indicate international visitors are not as aware as domestic visitors of the need to book accommodation in a destination with limited accommodation availability. In addition, domestic visitors may have a greater need and ability make fixed bookings, perhaps to coincide with more rigid holiday periods and reflecting higher levels of local knowledge and the ease of booking that come from being at home (with internet and telephone access) immediately before their visit.

²⁵ If those who were unsure about where they were spending some nights are removed from the data, the average ages of those booking some and none of their accommodation are altered slightly but remain significantly lower than the average age of those booking all of their accommodation in advance.

Discovering visitors book their accommodation more often than familiar or attached visitors, and domestic visitors book more than international visitors. A total of 70% of all discovering domestic visitors booked all their accommodation in advance of their trip.

Respondents had made 129 accommodation bookings in advance of their trip, some respondents had made no bookings, and others had made more than one. Data were collected on when 60 of the 129 bookings were made²⁶. These 60 bookings account for 211 nights of accommodation. Table 27 shows some of the data collected on these bookings.

Table 27: Number and length of advance accommodation bookings

No. of days prior to arrival booking made	No. of bookings made	No. of nights booked	Average no. of nights per booking
0–7 days ²⁷	18	30	1.7
8–30 days	19	80	4.2
31–91 days	7	28	4.0
92–182 days	9	36	4.0
182–365 days	7	37	5.3
All bookings	60	211	3.5

Of the 60 bookings, 37 (62%) were made 30 days or less before the visitor's arrival in the Lake Waikaremoana area. Those visitors staying in the area for the longest periods booked furthest in advance. Bookings made a week or less before the visitor's arrival were for a mean of 1.7 nights. Bookings made more than a week, but less than 6 months, before the visitor's arrival were for a mean of about 4 nights. Bookings made more than 6 months before the visitor's arrival were for a mean of 5.3 nights.

Domestic visitors, on average, book their accommodation further ahead than do international visitors. The mean booking time for domestic visitors was 93 days before arrival, while for international visitors it was only 33 days before arrival.

Seventy-eight (60%) of the 129 bookings made were for trips during Week 1. Although more bookings were made for Week 1 than for Week 2, bookings for Week 2 were, on average, made further in advance. Bookings for Week 1 were made a mean of 54 days in advance; bookings for Week 2 were made a mean of 94 days in advance. However, some members of the Rotary Caravan Club (who visited in Week 2) told us they had booked a year in advance. If these respondents are

²⁶ There was initially some confusion over the collection of this item and not all respondents were asked when their booking was made. Of those respondents who were asked some were unable to remember when the booking was made and others knew that a booking had been made by another member of their party but did not know when this had been done.

²⁷ '0 days' refers to those bookings made on the day of arrival but made before arrival in the area, for example, made before leaving the previous night's accommodation.

excluded from the analysis bookings in Week 1 were made a mean of 54 days in advance and bookings for Week 2 were made a mean of 57 days in advance.

Accommodation wishes

As well as being asked which accommodation they were staying in during their visit, respondents were asked to consider the accommodation options on an extensive list. Respondents were advised that not all the types of accommodation listed are currently available in the area but were asked to specify which they would be most likely to stay in and which they would not consider staying in if all were available in the area.

Respondents were asked to select from the accommodation options list the three accommodation types they would be most likely to stay in if all of those in the list were available. Some respondents were unable to choose exactly three choices, and surveyors recorded the number of choices that they gave (ranging from 1 to 6). The average number of choices per respondent was 2.8.

Q: Here is a list of types of accommodation. Not all of these are currently available in this area. If you were coming here again and all of these types of accommodation were available which 3 types of accommodation would you be most likely to stay in?

<i>Private home/visiting friends or relatives</i>	<i>Free camping (tent, campervan, etc.)</i>
<i>Hotel</i>	<i>Homestay/Farmstay</i>
<i>Motel/Motor Inn</i>	<i>Marae</i>
<i>B&B</i>	<i>Holiday Home or Timeshare</i>
<i>Backpacker/Youth Hostel</i>	<i>Serviced Apartment</i>
<i>Commercial camp ground / holiday park</i>	<i>Exclusive/Luxury Lodge</i>
<i>Hunting/fishing/tramping lodge</i>	<i>Maori Lodge</i>
<i>National Park DOC hut or tent site</i>	<i>Other</i>

There were a small number of inconsistencies in the way in which this question was answered. For example, some respondents commented that they could not select 'Visiting Friends or Relatives' as they did not have any personal contacts in the area; other respondents selected this category as a type of accommodation they would choose to stay in if it was available to them, even though at the time of the survey it was not. This issue was not anticipated before the survey and the number of respondents making these comments was not recorded next to their choices.

In addition, some respondents qualified their choices, for example, three respondents said they would choose a farmstay in their top three choices but not a homestay. These qualifications were recorded and where it is not consistently possible to present a respondent's answer alongside those of other respondents that answer has been excluded from the data shown. Table 28 shows the number of respondents who selected each accommodation option.

The most popularly selected accommodation type was a commercial camp ground or holiday park. As most of the people surveyed were staying at a motor camp for at least 1 night of their stay, it is unsurprising that this response was popular. Similarly, Department of Conservation facilities and free camping were popular options both in terms of where respondents reported actually staying and where they said they would choose to stay if numerous options were available. Motel units and backpackers' accommodation are also available in the area and were, respectively, the fourth and fifth most popular options in the accommodation options list. In summary, those accommodation types in which visitors were actually staying were also those ranked most highly in the accommodation options list – in other words, current visitors demand the accommodation types that are already present.

From the tie-in between the desired options and the options actually available in the area it is clear there is a good match between the accommodation types visitors would choose and those actually available. It does not appear to be the case that visitors are staying in accommodation they would not

otherwise choose in order to be able to access the region. What is unclear, however, is whether the accommodation has been provided in response to the needs of those who visit, or whether the people choosing to visit are those who know that accommodation meeting their needs is available in the area. If the latter, there may be other groups of potential visitors who do not actually visit because accommodation of the type they would choose is not available.

Table 28: Number of respondents selecting different accommodation options

Accommodation type	Number of respondents selecting option
Commercial camp ground/holiday park (tent, cabin, campervan)	126
National Park DOC hut or tent site	91
Free camping (tent, campervan, etc.)	76
Motel/Motor Inn	56
Backpacker/Youth Hostel	34
Hunting/fishing/tramping lodge	32
B&B	21
Private home/Visiting friends or relatives	20
Homestay/Farmstay	18
Marae	15
Serviced Apartment	10
Hotel	9
Holiday Home or Timeshare	9
Exclusive/Luxury Lodge	8
Maori Lodge	5
Other	0
Total number of selections	530

Table 29 shows some of the characteristics of those choosing each of the options on the accommodation options list. In the interests of practicality all the differences shown in this table are not discussed here, however, it is hoped that this table may give some useful insights into what can be done with the data that have been collected. The information box below the table explains two easy ways in which operators might use this table.

Table 29: Demographics of those selecting each of the accommodation options

Accommodation type	Gender		Origin		Mean Age	Visitor Classification		
	Male (%)	Female (%)	Domestic (%)	International (%)		Discovering (%)	Familiar (%)	Attached (%)
Commercial Camp	43	57	80	20	49	50	28	22
DOC	46	54	71	29	46	47	21	32
Free Camping	51	49	78	22	44	37	33	30
Motel	41	59	84	16	54	57	18	25
Backpacker	47	53	62	38	38	82	9	9
Lodge	47	53	88	13	44	31	28	41
B&B	52	48	62	38	53	86	10	5
Private home	60	40	50	50	42	60	20	20
Homestay	39	61	61	39	55	67	22	11
Marae	40	60	80	20	49	33	27	40
Apartment	40	60	90	10	55	50	30	20
Hotel	56	44	67	33	53	67	22	11
Timeshare	22	78	89	11	53	78	11	11
Luxury Lodge	50	50	88	13	54	38	25	38
Maori Lodge	40	60	40	60	49	60	20	20
All visitors	47	53	76	24	48	52	23	25

Operators guide to using the accommodation demographics table:

There are two easy ways to use this table.

To find out something about those selecting a particular type of accommodation.

For example, if you want to establish a Maori Lodge and want to know about people who may be interested; find the 'Maori Lodge' row and, through reading along this row, you will see that more women than men selected this type of accommodation. Similarly more international than domestic visitors selected the Maori Lodge. The average age of those selecting the Maori Lodge was 49 years, which is very similar to the average for all visitors at 48 years. Most of the visitors who selected the Maori Lodge were discovering visitors.

To find out which accommodation is preferred by a certain demographic group.

For example, if you are interested in the different accommodation types selected by respondents of different ages, look down the 'Mean Age' column. You will see that those selecting 'Backpackers' had the lowest mean age (38 years) and those selecting 'Homestay' and 'Apartment' had the highest mean ages (55 years).

In addition to being asked which accommodation they would be most likely to stay in, visitors were asked if there were any types of accommodation that they would not consider staying in.

Q: Here is a list of types of accommodation. Not all of these are currently available in this area. If you were coming here again and all of these types of accommodation were available are there any which you would not consider staying in?

<i>Private home/visiting friends or relatives</i>	<i>Free camping (tent, campervan, etc.)</i>
<i>Hotel</i>	<i>Homestay/Farmstay</i>
<i>Motel/Motor Inn</i>	<i>Marae</i>
<i>B&B</i>	<i>Holiday Home or Timeshare</i>
<i>Backpacker/Youth Hostel</i>	<i>Serviced Apartment</i>
<i>Commercial camp ground/holiday park</i>	<i>Exclusive / Luxury Lodge</i>
<i>Hunting/fishing/tramping lodge</i>	<i>Maori Lodge</i>
<i>National Park DOC hut or tent site</i>	<i>Other</i>

Table 30 shows the number of respondents who said they would not stay in each of the types of accommodation listed. Some respondents selected more than one type of accommodation in which they would not consider staying, while other respondents said that they would consider staying in any of the types listed.

Table 30: Types of accommodation in which respondents would not consider staying

Accommodation type	Number of respondents who would not consider staying
Exclusive/Luxury Lodge	119
Hotel	98
Serviced Apartment	83
Marae	82
Maori Lodge	76
Holiday Home or Timeshare	72
Backpacker/Youth Hostel	69
Motel/Motor Inn	59
B&B	58
Homestay/Farmstay	53
Private home/Visiting friends or relatives	50
Hunting/fishing/tramping lodge	44
National Park DOC hut or tent site	15
Free camping (tent, campervan, etc.)	15
Commercial camp ground / holiday park (tent, cabin, campervan)	13
Total number of selections	906

Those types of accommodation most often selected by respondents as places in which they would not consider staying were those that are usually found at the higher priced, more luxurious end of the market. As there is no luxury accommodation currently available in the area it is unsurprising that

visitation in the area currently includes few visitors who would choose to stay in luxury accommodation.

A large number of respondents also said they would not consider staying in either of the Maori accommodation options offered (marae and Maori lodge). It is worthwhile noting that a lot of the international visitors did not understand the term 'marae'. When asked, surveyors explained that a marae is a Maori meeting house or community centre where visitors can sometimes stay and experience Maori culture. It is likely that other international visitors who did not ask for clarification also did not understand the term 'marae' and did not respond as they would have done had they understood the term. This is supported by the fact that 60% of those who said that they would like to stay at a Maori lodge were international visitors, yet only 20% of those who said they would like to stay at a marae were international visitors. This may suggest that the Maori cultural element in accommodation choices is popular among international visitors but that there may be some lack of understanding of marae as an accommodation option.

Eighty-four respondents, a mixture of both domestic and international visitors, said they would not consider staying on a marae. Among the comments respondents made about staying at a marae were:

"I probably wouldn't be invited [to a marae]"

"I wouldn't stay, out of respect"

"We have no access"

"I've got nothing against Maori but I think you'd need some affiliation to do that"

This suggests some respondents knew what a marae was but did not understand the concept of paying to stay at one as a visitor and were thinking only of being asked to stay as an invited guest.

These comments imply that there are some significant obstacles to be overcome by anyone wishing to set up visitor accommodation on a marae. Public information and marketing would need to ensure international visitors know what a marae is and would also need to avoid using words international visitors might not understand. It would also be beneficial to provide a welcome to all visitors and to ensure they understood their role in a space to which they usually would not have access.

One respondent also commented:

"I don't want to sleep with a hundred people on the floor."

This was the only comment recorded suggesting that the communal and basic nature of marae stays would put respondents off staying on a marae; while respondents were not specifically questioned about this others may echo this sentiment if asked. However, most respondents who said they would not consider staying on a marae would also not consider staying in a Maori Lodge, which suggests it is not the basic nature of marae stays that put respondents off choosing this type of accommodation.

Some respondents did comment that they would not stay in a Maori Lodge as they thought it sounded expensive. Of the 76 respondents who said that they would definitely not stay in a Maori Lodge, 53 also said they would not stay in a Luxury Lodge.

Eighty-eight percent of the visitors who said they would not consider staying in a Maori Lodge and 89 percent of those who said they would not consider staying on a marae were domestic visitors. Only 76% of those who said they would not consider staying in a Luxury Lodge were domestic visitors.

From the accumulation of information and anecdotal evidence on the different accommodation options it seems likely that both domestic and international visitors are put off visiting a luxury lodge or a Maori lodge because they are expected to be expensive. Some domestic visitors may be put off visiting a marae or Maori Lodge by the expectation of a Maori cultural experience, while some international visitors may be put off visiting a marae through a lack of understanding of what 'marae' means.

3.6 Activities

This section shows the activities respondents to the survey had been involved in or were planning to do while in the Lake Waikaremoana area. It also shows the results of a question asking respondents to select favourite activities from a list of options, not all of which are available in the area currently. Tramping was an extremely popular activity both in terms of activities actually undertaken and activities selected from the options list. Kayaking and fishing were also both popular choices from the options list.

Respondents to the survey were asked what activities they had done or were planning to do during their trip. No distinction was made between activities already undertaken and those which respondents were intending to do but had not done when they were surveyed. In this section, 'activities undertaken' refers to intended activities as well as those already undertaken.

Q: Which of the following activities will you be doing in the Lake Waikaremoana area during this visit?

<i>Great walk (all or part)</i>	<i>Motorboating</i>
<i>Other overnight tramp</i>	<i>Horse riding or trekking</i>
<i>Day or short tramp or bush walk</i>	<i>Marae visit</i>
<i>Fishing</i>	<i>Visiting friends or relatives</i>
<i>Hunting</i>	<i>Scenic drive</i>
<i>Swimming</i>	<i>Relaxing / doing nothing</i>
<i>Kayaking/rowboating</i>	<i>Other</i>
<i>Waterskiing</i>	

Q: Did you book any of those activities before you arrived in the area?

The following paragraphs provide a brief outline of the activities currently being undertaken in the area and the extent to which respondents had planned their activities before arrival in the area.

It should be noted that while respondents were given the option to mention activities that were not on the cue card they were shown, few did so. It seems likely that some respondents had carried out activities which were not on the cue card but either forgot them or did not think them relevant to add to the list. For example, there is a small display of local artifacts and historical information at the DOC visitor centre. Several visitors mentioned this small museum in conversation but none reported visiting it when asked about the activities they had undertaken.

Table 31 shows the most common activities undertaken by respondents to the survey. Going for walks or tramps of 1 day or less was the most popular activity and was undertaken by 74% of respondents. In all, 87% of all respondents reported going on some kind of tramp or walk.

Swimming and 'relaxing or doing nothing' were also popular, and each was undertaken by more than half of the sample.

It should be noted that all the respondents had travelled into the region by road, and some respondents considered this journey a scenic drive; other respondents only reported going on a scenic drive if they had been on a vehicle excursion where the main or only purpose was viewing the scenery.

Table 31: Activities undertaken or intended by respondents

Activity	Number of respondents doing activity	Percentage of respondents doing activity
Day or short tramp or bush walk	141	74
Relaxing/doing nothing	127	67
Swimming	102	54
Scenic drive	82	43
Fishing	69	36
Kayaking/rowboating	56	29
Great walk (all or part)	47	25
Motorboating	43	23
Waterskiing	12	6
Marae visit	10	5
Visiting friends or relatives	9	5
Hunting	7	4
Other overnight tramp (not Great Walk)	6	3
Horse riding or trekking	2	1
All respondents	190	100

Of the 190 respondents who answered questions on the activities they were undertaking, only 30 had booked any activities before they arrived in the area. Of these 30 respondents, 28 had made a booking to walk all or part of the Great Walk (which may include accommodation along the way and/or transport to the ends of the walk). One respondent had made a booking for one of the huts used by those undertaking the Great Walk, although he was actually intending to do a different tramp. One respondent had made a booking for a tour in a motorboat. Two respondents, who had made a booking for the Great Walk, had also made a booking to use a rowboat for half a day.

While most of those intending to do the Great Walk made bookings before their arrival, very few other activities were booked in advance. This suggests few visitors had firm time commitments during their visit and may indicate that activity-based businesses may be able to attract clientele after they have arrived in the area rather than needing to include an activity in a tight schedule before the visitor in question even leaves home.

As well as discussing activities actually undertaken, respondents were asked to identify, from a list of possible activities, which ones they would be most likely to do and which they would not consider doing if all were available in the area.

Q: If all of the following activities were available are there any that you would not consider doing?

Guided tramp (overnight)

Guided tramp (day only)

Independent tramp (overnight)

Independent tramp (day only)

Guided fishing trip

Independent fishing trip

Guided hunting trip

Independent hunting trip

Guided motorboat trip

Guided kayaking trip

Independent kayaking trip

Guided cruise (with fishing)

Guided cruise (without fishing)

Guided horse trekking

Marae visit

Conservation or nature talk

Film about the area

Q: Looking at that same list again, which 3 activities would you be most likely to do?

Some of the activities on the options list shown are readily available in the area, some are available but can be difficult to find out about and some are not available at all. There are interesting comparisons to be made between the activities a respondent actually undertook and those the respondent said they would be most likely to undertake. Before considering the results, however, it is important to note some limitations to the question style and analysis attempted.

There is not a complete mapping between the list of activities undertaken and those on the options list. This means a precise comparison of activities undertaken with activities selected from the options list cannot be made. One reason for this incomplete mapping is that whereas the options list question was initially devised to judge attitudes to guided versus independent activities (see next section), the question about activities undertaken reflects only the activities themselves and not whether they were guided or independent. Where a respondent has said he would choose to go on a guided fishing trip and has reported he went fishing it is difficult to establish whether he went on a guided fishing trip (as desired) or whether he went on an independent fishing trip – perhaps because he had not been able to locate a suitable guide.

Different respondents were surveyed at different stages of their trip. If a respondent was surveyed on arrival in Lake Waikaremoana having come to the area for the Great Walk, that respondent would probably select one of the tramping options as an activity the respondent would be likely to do. However, if that same respondent was surveyed just before leaving the area, the question might be considered from the point of view of activities to do if returning to Lake Waikaremoana; for example, having just done the Great Walk the respondent might decide that during a future visit s/he would prefer to engage in different activities, such as fishing, hunting or kayaking, rather than tramping. The data collected do not allow us to determine whether a respondent was surveyed at the beginning, middle or end of their trip, or was thinking about activities to undertake during this trip or during a subsequent one.

Some respondents undertook more than three activities but were only asked for three top choices from the options list. Therefore, undertaking activities not selected from the options list does not necessarily represent an inconsistency of choice. A respondent may have selected fishing, hunting, and kayaking from the options list and may have already been fishing, hunting, kayaking, and walking.

The options list, for practical reasons, contains fewer activities than it is possible to undertake in the area, meaning that respondents may have been forced to answer in ways they would not otherwise have chosen. For example, a respondent who may actually have chosen to go paragliding, cycling and waterskiing could not have selected these from the options list and so would probably have selected activities he or she may actually be unlikely to undertake. Also, the limited range of options on the list meant any respondents who were unable to do certain activities might have found themselves

confronted with a reduced range of options. A respondent who is not able to undertake physically demanding activities, for example, will have chosen options from a reduced list. This may have an effect on the demographic profile of those choosing less physically demanding activities. For example, most of those individuals genuinely interested in attending a conservation talk are in their 30s, but if a significant number of older respondents have chosen this option because it is less physically demanding than the others on offer, this may skew results toward older age groups.

In almost every case more people selected an activity from the options list than had actually undertaken, or were intending to undertake, that activity during their trip. For example, 82 respondents expressed an interest in doing an overnight tramp (12 guided and 70 independent) but only 6 individuals were actually planning an overnight tramp during their trip. Similarly, 28 people expressed an interest in visiting a marae but only 10 respondents actually did so. This may be partly a result of respondents being asked to choose three options from a limited list when their actual activity choices may have come from a larger range.

Interestingly, more respondents actually reported going on a tramp or walk of a day or shorter than chose this activity from the options list. The data do not show why this is the case but short walks may be taken for granted (and therefore are not a priority and so are not chosen from the options list), may be easy to undertake and require little planning (and so may be used to fill in gaps in itineraries) or respondents undertake walks to get to other activities (such as walking to an area good for fishing) and, while they report the walks as activities they do not see them as aspirational or desired.

More people also went motorboating than selected a guided motorboating trip from the options list. This is probably because a large number of those people who actually went motorboating used their own boat but there was no independent motorboating item included on the options list. Of the respondents who specified whether they had been on a commercial motorboating trip or on a privately owned boat, 69% had used a privately owned boat. In addition, some respondents may have used a motorboat as transport to access a location for another activity, such as fishing and, as with walking, may not have seen the transport as a desired activity in itself.

Despite the analysis limitations listed here, it is likely that an informative ordinal picture of preferences for different activities has been achieved. While Shugan and Swait (2000), writing from a marketing perspective, note that intent is not a perfect indicator of behaviour, they also note that those products that receive higher intent-to-purchase ratings may be more likely to be taken up than those with lower intent ratings. For the purposes of this survey, then, it seems likely that if all the activities on the options list were readily available, those that were selected more often by respondents would be more popular among visitors.

Table 32 shows the number of respondents selecting each activity from the options list.

Table 32: Number of respondents selecting different activity options

Activity	Number of respondents selecting option
Independent tramp (day only)	84
Independent kayaking trip	73
Independent tramp (overnight)	70
Independent fishing trip	54
Conservation or nature talk	50
Guided horse trekking	35
Guided kayaking trip	31
Marae visit	28
Guided fishing trip	26
Guided tramp (day only)	20
Guided motorboat trip	20
Film about the area	20
Guided cruise (with fishing)	18
Guided cruise (without fishing)	13
Guided tramp (overnight)	12
Independent hunting trip	12
Guided hunting trip	5
Total number of selections	571

To establish profiles of the demand for a range of activities, the following section compares the activities from the options list with demographic data and records of the activities the respondents actually undertook.

Tramping

Tramping emerged from the data collected as the most popular activity amongst visitors and a large part of the reason why people choose to visit the area.

- ? 87% of respondents reported going on some kind of a tramp or walk during their visit.
- ? Tramping was the activity most commonly mentioned as part of the reason why respondents had chosen to visit the Lake Waikaremoana area.
- ? The most commonly cited factor attracting respondents to return to the area in future was a desire to do more walking or tramping.

Table 12 showed that tramping featured commonly in the stated motivations for visiting for both discovering and familiar visitors. Many attached visitors also went tramping, and between 82 and 92% of people in each visitor classification actually undertook a walk or tramp of some kind. Similarly, high numbers of both domestic and international visitors went walking or tramping.

Such a high proportion of the respondents undertook a walk that it is difficult to establish a profile of those who engage in walking – it is basically a very similar profile to that of this survey. However, data show which kind of walks respondents undertook and there are some differences between the profiles of those undertaking different kinds of walks.

The main difference between the respondents undertaking different kinds of walks was in their ages. The average age of respondents to the survey was 48 years; the average age of those undertaking an overnight tramp that was not part of the Great Walk was 39; and the average age of those doing the whole of the Great Walk 40. Those respondents doing only part of the Great Walk had an average age of 46, and those undertaking a walk of one day or less had an average age of 49.

Table 33: Mean age of respondents undertaking different tramps

Type of tramp	Mean age of trampers
Overnight (not GW)	39
All of Great Walk	40
Part of Great Walk	46
Day or short tramp or bush walk	49
All respondents	48

While it is not possible to establish the difficulty of the different walks listed here, it seems reasonable to suggest that the more demanding walks attract younger walkers.

The Great Walk is more popular with discovering visitors (32% of whom did all or part of the Great Walk) than it is with familiar (18%) or attached (17%) visitors. Table 34 shows the percentage of visitors from each visitor classification who undertook each of the different types of walks mentioned.

Table 34: Percentage of visitors undertaking tramps by visitor classification and type of tramp

Type of tramp	Visitor classification	Percentage of visitors undertaking tramp
Great walk	Discovering	32
	Familiar	18
	Attached	17
Overnight tramp	Discovering	4
	Familiar	0
	Attached	4
Day walk	Discovering	74
	Familiar	73
	Attached	75

Of the international visitors, 31% undertook the Great Walk compared with 23% of domestic visitors. Table 35 shows the percentage of domestic and international visitors who undertook each of the different types of walks mentioned.

Table 35: Percentage of visitors undertaking tramps by visitor origin and type of tramp

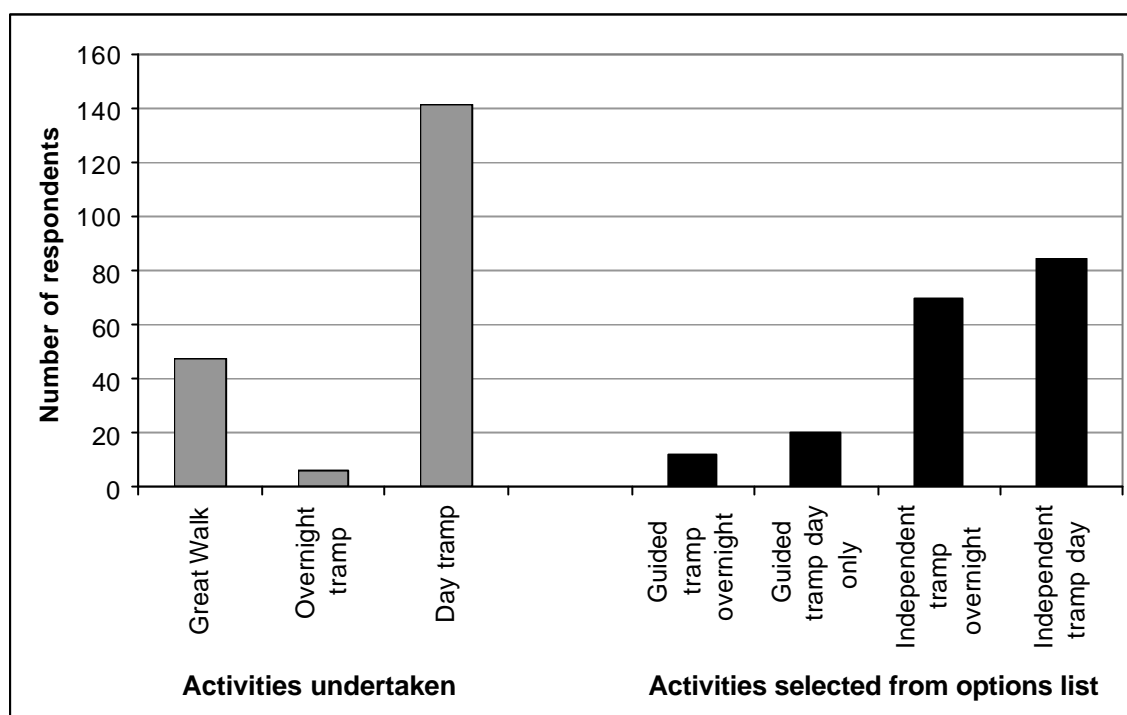
Type of tramp	Visitor origin	Percentage of visitors undertaking tramp
Great walk	Domestic	23
	International	31
Overnight tramp	Domestic	2
	International	7
Day walk	Domestic	72
	International	80

The activity options list included four different kinds of walk or tramp:

- ? Guided overnight tramp
- ? Guided day tramp
- ? Independent overnight tramp
- ? Independent day tramp

Chart 7 shows the number of respondents who had actually undertaken, or were planning to undertake, a walk or tramp during their trip. It also shows the number of respondents who selected the different tramping options from the activity options list.

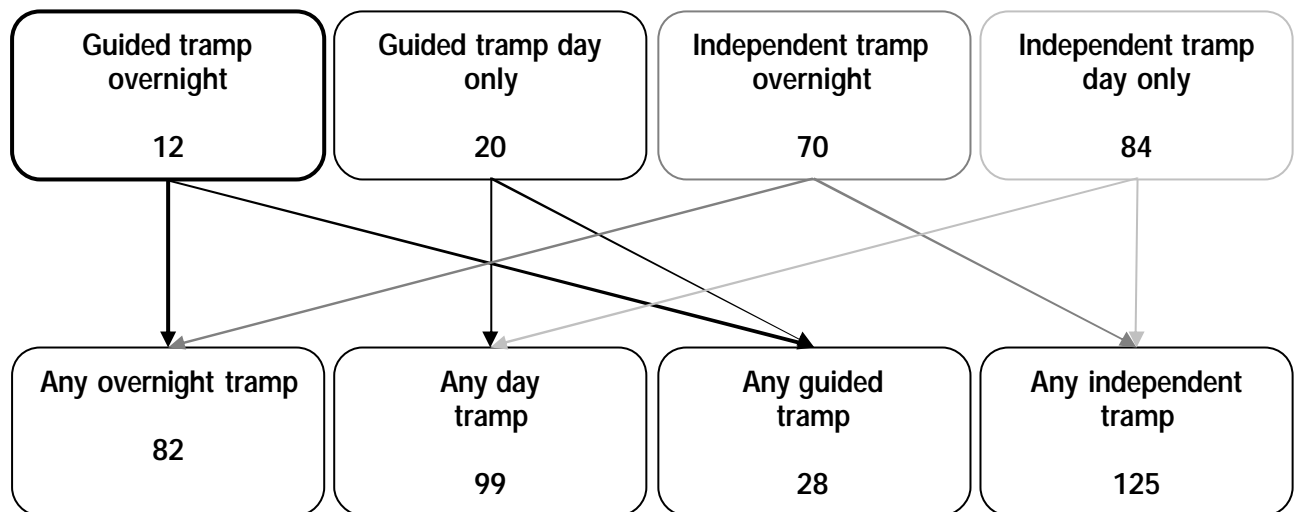
Chart 7: Tramping undertaken or planned and tramping options selected from the activity options list



Of the 191 respondents, 145 selected at least one of the tramping options as one of the three things that they would be most likely to do if all the options on the list were available. Interestingly, 87% of all respondents undertook some kind of walk or tramp but only 76% put this in their top three activity choices. As mentioned above, in most cases more respondents report a desire to do something than actually do it; walking is the exception to this rule. This may be because short walks are easy, taken for granted or require little in the way of forward planning.

The first row of Chart 8 shows the number of respondents selecting each of the tramping options from the list provided. The second row shows these selections re-ordered according to tramp types (overnight or day tramp and guided or independent tramp). Some visitors selected more than one of the walking options²⁸.

²⁸ Where visitors were able to select more than one option, summed figures may appear inconsistent with their constituent parts. For example, 12 respondents selected guided tramp overnight and 20 selected guided tramp day only; 4 of the respondents selected both of these – this means 28 (and not 32) respondents selected at least one guided tramp.

Chart 8: Number of respondents selecting different kinds of tramp from the options list

Of those respondents who selected walking from the options list, 82 selected the option of an overnight tramp compared with 99 who selected the option of a day tramp; 28 selected the option of a guided tramp compared with 125 who chose an independent tramp.

Such a large proportion of the visitors selected tramping from the options list that their profiles closely resemble those of the sample as a whole. However, there are some differences between the profiles of those who selected different kinds of tramps from the options list. Some of these differences are shown in Table 36.

Those who selected guided walks from the activity list and those who selected independent walks expressed different accommodation preferences when shown the accommodation options list²⁹. Those who selected a guided tramp more often selected accommodation types likely to be more expensive and to have more facilities available, whereas those who chose an independent tramp more often selected the cheaper accommodation options with more basic facilities. For example, free camping was selected by 42% of those who had chosen an independent tramp but was only chosen by 22% of those who had chosen a guided tramp. In comparison, a luxury lodge was chosen by 13% of those who had chosen a guided tramp but was only chosen by 1% of those who had chosen an independent tramp³⁰. The table below shows some of the differences between the accommodation choices of respondents selecting guided or independent tramps.

²⁹ The accommodation data used here are from the accommodation options list only and do not refer to the accommodation in which respondents actually stayed.

³⁰ Where a respondent selected more than one tramp from the options list they will be included in these figures more than once.

Table 36: Differences between accommodation options selected by those who selected guided or independent tramps

Accommodation type (selected from the accommodation options list)	Percentage of guided trampers selecting	Percentage of independent trampers selecting
National Park DOC hut or tent site	38	59
Free Camping (tent, campervan, etc.)	22	42
Backpacker/Youth Hostel	19	23
Motel/Motor Inn	38	26
Luxury lodge	13	1
Hotel	9	3

Similar patterns exist between day and overnight trampers: those who expressed an interest in day tramping were more likely to choose the more expensive accommodation options with more facilities available; these are shown in Table 37.

Table 37: Differences between accommodation options selected by those who selected day or overnight tramps

Accommodation type (selected from the accommodation options list)	Percentage of day trampers selecting	Percentage of overnight trampers selecting
National Park DOC hut or tent site	50	62
Free Camping (tent, campervan, etc.)	31	49
Backpacker/Youth Hostel	18	28
Motel/Motor Inn	38	16
Luxury lodge	4	2
Hotel	6	1

More trampers interested in a guided walk expressed an interest in staying in a Maori accommodation option than did those trampers interested in independent walking (Table 38), perhaps suggesting that those interested in learning about their surroundings from a guide are also interested in accommodation options that offer cultural and learning opportunities.

Table 38: Preferences for Maori accommodation options expressed by guided and independent trampers

Accommodation type (selected from the accommodation options list)	Percentage of guided trampers selecting	Percentage of independent trampers selecting
Marae	16	7
Maori lodge	13	2

There was no difference between the percentages of day and overnight trampers who expressed a desire to stay in the Maori accommodation options.

Individuals who expressed an interest in guided walks had used consistently fewer information sources before their trip than had those who expressed an interest in independent walks. The average number of information sources accessed by each individual interested in independent walks was 2.5; the average number accessed by those interested in guided walks was 2.1³¹. Of those expressing an interest in independent walks, 24% had accessed no information sources before their trip compared with 32% of those expressing an interest in guided walks. This perhaps suggests guides may be used to compensate for limited initial preparation for the trip and awareness by visitors that they are not certain what they are looking at. Table 39 shows the information sources used by guided and independent trampers.

Table 39: Differences in information source use between guided and independent trampers

Information source	Percentage of guided trampers using source ³²	Percentage of independent trampers using source ³²
Guide book	47	40
Information centre	28	34
Brochure	19	35
Recommendation from friends or family	25	29
Internet	16	27
Recommendation from accommodation provider	3	4
Other personal recommendation	3	6
Telephone directory	0	6
Newspaper or magazine article	0	3

³¹ Includes only those individuals who used at least one information source.

³² Where a respondent selected more than one tramp from the options list, they will be included in these figures more than once.

Newspaper or magazine advert	0	1
Travel agent	0	1

If those interested in guided walks are those who use the least information sources before arrival in the area, they may also be those most likely to respond to publicity displayed within the area. While those interested in guided walks use fewer information sources than other visitors, they do still make use of guide books, information centres, brochures, and the internet, as well as personal recommendations.

Fishing

Brown and rainbow trout are present in both Lake Waikaremoana and nearby Lake Waikareiti, and fishing licences can be bought from the store at the Lake Waikaremoana Motor Camp (Department of Conservation 4)

Seventeen respondents reported that fishing was among their motivations for choosing to visit the Lake Waikaremoana area, and 'To go hunting or fishing' was among the top reasons for visiting for attached visitors.

Sixty-nine visitors reported doing some fishing (or intending to do some fishing) during the trip in which they were surveyed. Of these 69 visitors about half were female (35). Of the sample as a whole, 76% were domestic tourists, but 83% (57) of those intending to go fishing were domestic tourists; domestic tourists were slightly more likely to be going fishing than were international tourists. Although attached visitors accounted for only a quarter of the sample as a whole, nearly half of those going fishing (34) were attached visitors.

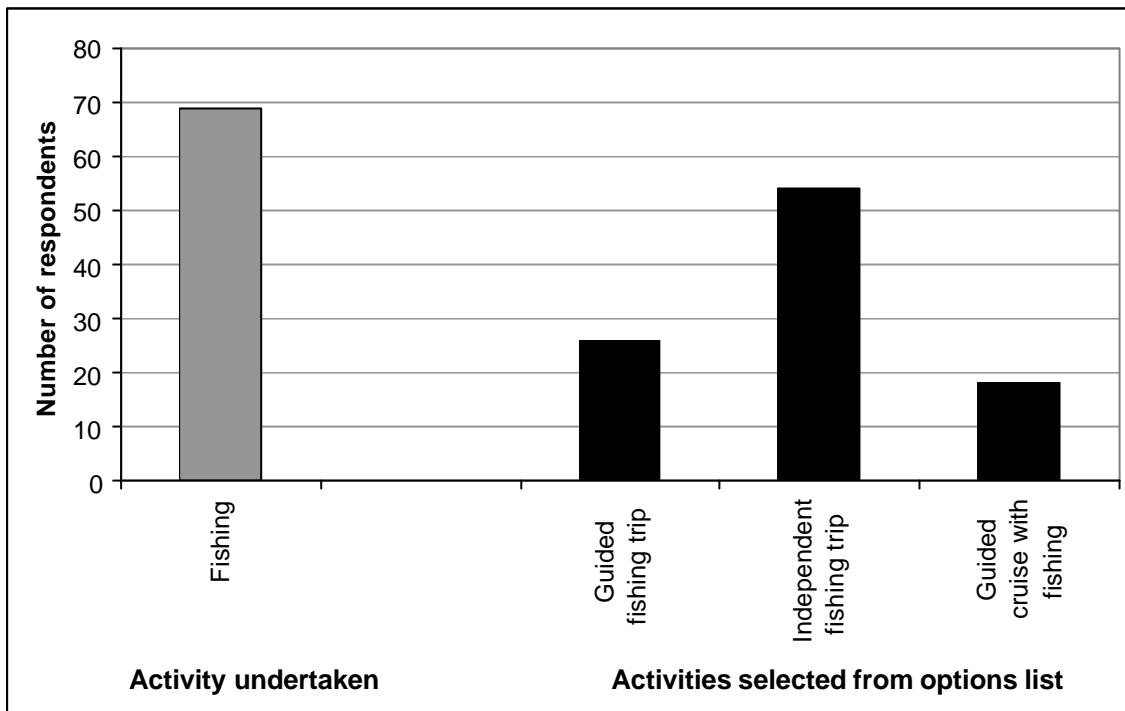
The average age of respondents who were doing some fishing during their trip was, at 45, slightly younger than the sample as a whole (48).

Chart 9 shows the number of respondents who had actually been fishing or were planning to go fishing during their trip. It also shows the number of respondents who selected the different fishing options (including 'Guided cruise with fishing') from the activity options list.

Twenty-six respondents chose guided fishing from the options list of activities, and 54 respondents chose independent fishing. Eighteen respondents selected a guided cruise with fishing.

Those who expressed an interest in guided or independent fishing were predominantly male (61%), although both those who expressed an interest in a cruise with fishing, and those who had been fishing during their trip were split evenly between the genders.

Chart 9: Fishing undertaken or planned and tramping options selected from the activity options list



Surveyors' accounts suggest that women reported going fishing during their trip when actually their husbands or partners fished while they themselves did not. This suggests that while males have more of an interest in fishing, females are present during fishing trips. There were 18 females who reported going fishing but who did not select either guided or independent fishing from the options list. Two of these females did select 'Guided cruise with fishing' but it is difficult to establish whether they were attracted to this by the cruise element or the fishing element. While the reasons for women going fishing but not selecting it from the options list may include that these women would prefer to take part in activities with their men rather than without them, it is also possible that these females would benefit from the availability of other activities to engage in while males go fishing. Some of the items selected from the options list by those 18 women who reported going fishing but did not specifically select fishing from the options list are shown in Table 40.

Table 40: Activity preferences of women who went fishing but did not select fishing from the activity options list

Activity (from the activity options list)	Number of women selecting (n=18)
Guided horse trekking	10
Independent kayaking	8
Independent tramp overnight	7
Conservation or nature talk	7
Independent tramp day only	5

Of particular note is that while only 18% of the cohort as a whole expressed an interest in horse trekking, over half the women who reported going fishing but did not select fishing from the options list expressed an interest in horse trekking. This may suggest that it would be productive to advertise horse trekking trips to the female companions of men who go fishing.

More respondents, both male and female, expressed an interest in independent fishing rather than guided fishing; however, a higher proportion of the women interested in fishing were interested in guided fishing (Table 41).

Table 41: Percentages of men and women who were interested in fishing who chose guided and independent fishing³³

	Percentage who selected guided fishing	Percentage who selected independent fishing
Men who selected fishing (n=49)	29	71
Women who selected fishing (n=31)	39	61
All respondents who selected fishing (n=80)³⁴	33	68

Of the men interested in fishing, only 29% were interested in guided fishing, of the women interested in fishing, 39% were interested in going with a guide. While in absolute terms more men than women showed an interest in all kinds of fishing, there may be a market for guided fishing trips for women.

Of those respondents who showed an interest in a guided cruise with fishing, half were male and half were female.

Of the respondents who showed an interest in guided or independent fishing, those respondents considered discovering visitors were the most likely to show an interest in guided fishing trips (Table 42). Attached and familiar visitors were more likely to show an interest in independent fishing trips. This may be because discovering visitors are unlikely to know the best spots for fishing in this particular area; however, anecdotal evidence suggests that some discovering visitors interested in fishing may not have fished before and may be interested in receiving technical assistance through a guide. Further research into the needs of those seeking a guide would be useful for anyone wishing to establish a guiding service for fishing trips.

³³ Respondents who chose both guided fishing and independent fishing are included in the figures twice.

Respondents who chose a guided cruise with fishing are not included in the figures.

³⁴ Total does not equal 100% due to the effects of rounding.

Table 42: Percentages of discovering, familiar and attached visitors who were interested in fishing who chose guided and independent fishing³⁵

Visitor classification	Percentage who selected guided fishing	Percentage who selected independent fishing
Discovering visitors who selected fishing (n=30)	50	50
Familiar visitors who selected fishing (n=23)	35	65
Attached visitors who selected fishing (n=27)	11	89
All respondents who selected fishing (n=80)	33	68

Of the 18 respondents who selected a guided cruise with fishing, 8 were discovering visitors, 8 were familiar visitors, and 2 were attached visitors.

Of those visitors who showed an interest in independent fishing trips, 59% reported that they would definitely visit the area again in future. This is consistent with the earlier finding that attached visitors are most likely to actually undertake a fishing trip.

Those interested in a guided cruise with fishing used an average of 2.3 information sources each compared with an average of 2.1 information sources each for those interested in guided fishing and 1.9 sources each for those interested in independent fishing³⁶.

Hunting

Hunting of introduced animals, such as deer and pigs, is allowed within Te Urewera National Park. There are some restrictions on the use of dogs, and all hunters must have a permit. Permits can be obtained from DOC offices in the region (Department of Conservation 4).

Eight respondents mentioned hunting while talking about the motivations for their visit to the Lake Waikaremoana area but several of these individuals did not actually intend to hunt during the trip. For example, one respondent mentioned he was injured and had chosen to go walking instead of hunting, another respondent explained that her partner hunts in the area a lot and had told her how beautiful the area was but she was not intending to go hunting.

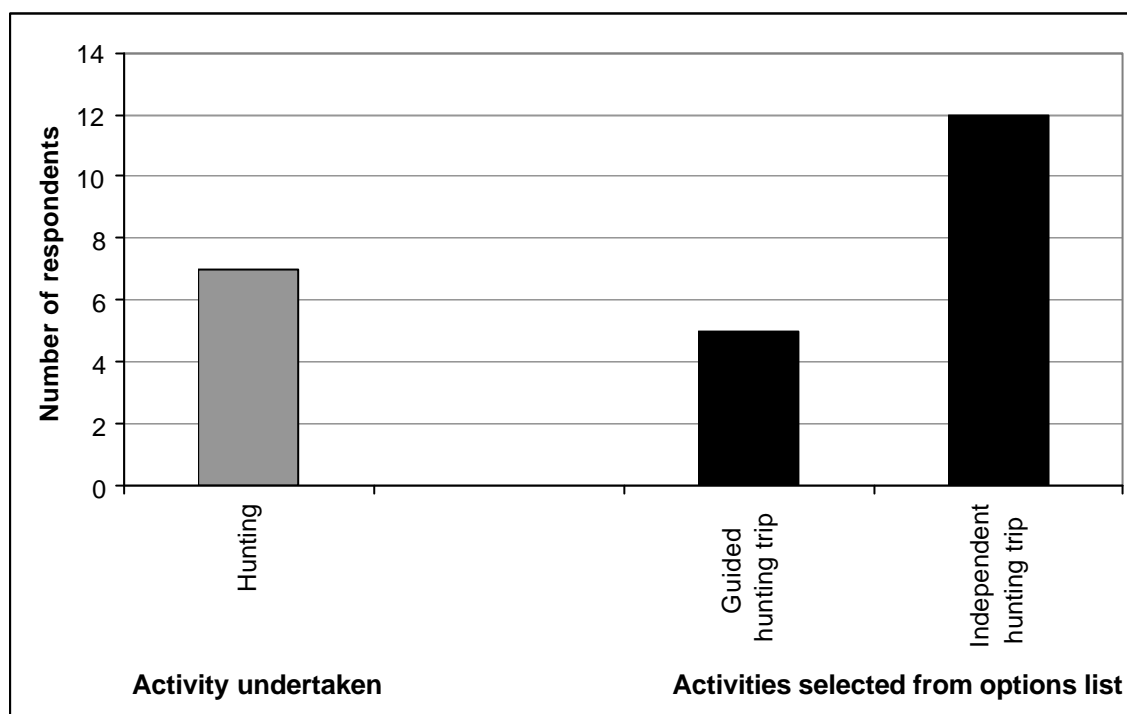
Seven respondents were actually undertaking some hunting as part of their trip. Of the 7 respondents hunting during their trip, 6 were attached, domestic visitors; the 7th was a familiar visitor from the UK. Four of the people engaging in hunting were male; 3 were female.

³⁵ Respondents who chose both guided fishing and independent fishing are included in the figures twice. Respondents who chose a guided cruise with fishing are not included in the figures.

³⁶ Includes only those individuals who used at least one information source.

Chart 10 shows the number of respondents who had actually been or were planning to go hunting during their trip. It also shows the number of respondents who selected the different hunting options from the activity options list.

Chart 10: Hunting undertaken or planned and hunting options selected from the activity options list



One respondent selected both guided hunting and independent hunting from the options list, 4 respondents selected guided hunting only, and 11 selected independent hunting only. Of the 16 respondents who selected at least one hunting option from the options list, 15 were domestic visitors; the other was from the Czech Republic. Eleven of the respondents selecting hunting were male; the other 5 were female.

Attached visitors were more likely to go hunting than either discovering or familiar visitors. Table 43 shows that of those who selected hunting from the options list, 29% were discovering visitors, 18% were familiar visitors, and 53% were attached visitors. These figures contrast sharply with the profile of the survey as a whole, in which 52% of respondents were discovering visitors, 23% were familiar visitors, and only 25% were attached visitors.

Table 43: Classification of visitors selecting hunting from the options list

Visitor classification	Percentage of respondents who were Discovering Visitors	Percentage of respondents who were Familiar Visitors	Percentage of respondents who were Attached Visitors
Visitors selecting hunting from the options list (n=16)	29	18	53
All visitors (n=190)	52	23	25

The preferred accommodation options for those choosing hunting are free camping (10 choices), DOC facilities (8 choices), and hunting, fishing or tramping lodge (8 choices). Those people interested in hunting expressed less positive attitudes toward most of the traditionally more expensive and better provisioned accommodation options (such as hotels, motels, timeshare or holiday homes and serviced apartments) than was the norm for the survey. However, where only 8 respondents to the survey (4%) chose Luxury Lodge as one of their preferred accommodation options, 2 of the 16 people who selected hunting from the options list (12%) also selected Luxury Lodge³⁷. Only 1 respondent selected either of Marae or Maori Lodge as one of their preferred accommodation types.

Those selecting hunting trips used fewer information sources to plan their trip than was the norm for the survey as a whole. The mean number of information sources used by those respondents to the survey who had used at least one information source was 2.4. Those respondents who selected guided hunting from the options list and had used at least one information source used a mean of 1.3 information sources each and those who selected independent hunting used a mean of 2.0 information sources each. Despite the high proportion of attached visitors amongst those who selected hunting options the use of information sources by these visitors is still lower than would be expected from the survey as a whole³⁸.

Thirty-eight percent of those selecting at least one hunting option from the list had used no information sources to plan their trip, this is comparable to what would be expected from the survey as a whole given the high proportion of attached visitors choosing hunting options.

In summary, the proportion of those choosing hunting options who consulted no information sources prior to their visit was similar to that which would be expected from the survey as a whole. However, those who chose hunting options and did consult information sources consulted fewer sources than would be expected from the aggregate survey results.

Motorboating & cruises

Forty-three of the respondents to the survey had been out on a motorboat or were intending to go out on one during their trip. These excursions included fishing trips and leisure cruises on privately

³⁷ It should be remembered here that with only 16 respondents selecting hunting from the options list percentages must be interpreted with care.

³⁸ Each discovering visitor used an average of 2.6 information sources; each familiar visitor used an average of 2.2 information sources and each attached visitor used an average of only 1.9 sources (see section 3.4, 'Travel and planning'). Attached visitors used fewer information sources than other visitors and many of those selecting hunting were attached visitors so we would expect those selecting hunting to have used fewer sources than the average for the survey. However, data show that those selecting hunting used even fewer sources than would be expected from this logic. If those selecting guided hunting from the options list had each used the average number of information sources for their classification (i.e. each discovering visitor had used 2.6 sources, each familiar visitor had used 2.2 sources and each attached visitor had used 1.9 sources) then the average number of information sources used by those selecting guided hunting would have been 2.2 as opposed to the 1.3 shown above. Similarly, if those selecting independent hunting from the options list had each used the average number of information sources for their classification then the average number of information sources used by those selecting independent hunting would have been 2.2 as opposed to the 1.9 shown above.

owned boats, sightseeing visits in commercially owned boats and water taxi transfers (particularly to and from the ends of the Great Walk).

Not all respondents were asked the nature of their motorboating trip; however, of those who were asked, 69% said they had been out in a private boat (usually belonging to the respondent or to a friend or relative), and 31% said they had been out in a commercially operated vessel.

Of the 22 individuals who reported having been out in a privately owned vessel, 21 were domestic visitors and 1 was an overseas visitor from the UK. Seventeen of the visitors were attached visitors, 4 were familiar visitors, and 1 was a discovering visitor.

In contrast, of the 10 individuals who reported having been out in a commercially owned vessel, only 1 was an attached visitor, 3 were familiar visitors, and 6 were discovering visitors. However, as with privately owned vessels, most of those who had been out on commercial vessels were also domestic visitors, with only 1 of the 10 coming from overseas (UK).

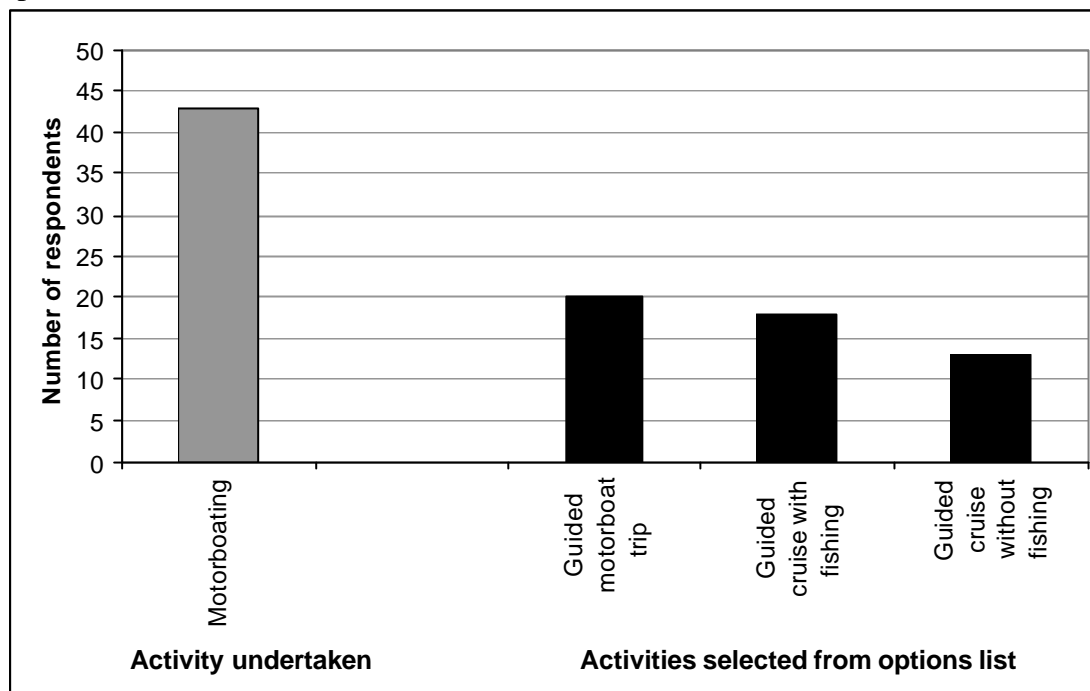
Of the 11 respondents who did not report whether their trip was in a privately owned or commercially owned vessel, 2 were from the UK, and the remaining 9 were domestic visitors. Of these 11 respondents, 5 were discovering visitors, 2 were familiar visitors, and 4 were attached visitors.

The only visitors who reported going motorboating were from New Zealand or the United Kingdom; it is unclear whether other visitors did not go out in boats or whether an element of error was introduced in the way the question was asked. It is possible that visitors from countries other than New Zealand and the UK considered the term 'motorboating' to apply only to leisure boating (and not to water transport services) or perhaps to something akin to speedboating (not gently cruising in a boat with a motor). This issue was not discovered until analysis revealed the unusual division of nationalities and so was not queried with respondents.

Chart 11 shows the number of respondents who had actually been or were planning to go motorboating during their trip. It also shows the number of respondents who selected the different boating options from the activity options list³⁹.

³⁹ Kayaking and rowboating are not included here; these are discussed in a separate sub-section below.

Chart 11: Motorboating undertaken or planned and boating options selected from the activity options list



The options list contained three motorboating options, guided motorboating, a guided cruise with fishing, and a guided cruise without fishing. Twenty respondents selected guided motorboating, 18 selected a guided cruise with fishing, and 12 selected a guided cruise without fishing. Three of the respondents selected both guided motorboating and guided cruise with fishing, and 2 selected both guided motorboating and guided cruise without fishing.

Eight of the 45 respondents who chose at least one motorboating option were from overseas. The overseas visitors choosing these options came from a variety of countries – Australia, Canada, Germany, the Netherlands, South Africa, and the UK. Guided cruise with fishing was chosen by 18 respondents, only 1 of whom was from overseas; this is consistent with the finding that fishing is more popular amongst domestic visitors than amongst visitors from overseas. Of those choosing cruise with fishing 83% were domestic visitors, and 83% of those choosing either guided fishing or independent fishing were domestic visitors. For the other two boating options the ratio of domestic to international visitors was similar to the norm for the survey as a whole. Domestic visitors made up 76% of the survey as a whole, 80% of those choosing motorboating, and 75% of those choosing cruise without fishing.

Attached visitors were underrepresented amongst those selecting motorboating options at only 10% compared to the 25% of attached visitors in the survey as a whole; both discovering and familiar visitors were slightly overrepresented at, respectively, 56% (52% whole survey) and 34% (23% whole survey). Of the three motorboating options, attached visitors were most strongly represented among those opting for a guided cruise with fishing (11% of those choosing this option were attached visitors); familiar visitors were also most strongly represented among those opting for a guided cruise with fishing (44% of those choosing this option were familiar visitors); while discovering visitors were most strongly represented among those opting for a guided cruise without fishing (67% of those choosing this option were discovering visitors).

Accommodation in a commercial camp was very popular among those who had selected motorboating from the activities options list, with over 80% of respondents in each of the boating categories selecting commercial camp from the accommodation options list as one of their preferred places to

stay. Those who selected guided motorboat trip also favoured motels (55% selected motel), whereas those who selected guided cruise without fishing favoured DOC facilities (67% selected DOC), and those who selected guided cruise with fishing favoured free camping (39% selected free camping) (Table 44).

Table 44: Accommodation preferences of those selecting motorboating from the activities options list

Accommodation type (selected from the accommodation options list)	Percentage of all respondents selecting each accommodation option	Percentage of those who selected a motorboating option who also selected each of the accommodation options		
		Guided motorboat trip	Guided cruise with fishing	Guided cruise without fishing
Commercial camp ground/holiday park	66	90	83	92
Motel/Motor Inn	30	55	33	58
National Park DOC hut or tent site	48	20	28	67
Free camping (tent, campervan etc)	40	20	39	33
B&B	11	15	11	25
Holiday Home or Timeshare	8	15	6	17
Backpacker/Youth Hostel	18	5	17	8
Hunting/fishing/tramping lodge	19	5	22	0
Homestay/Farmstay	12	15	11	0
Exclusive/Luxury Lodge	4	15	11	0
Marae	8	10	11	0
Serviced Apartment	5	5	11	0
Private home/Visiting friends or relatives	10	0	11	0
Hotel	5	0	6	0
Maori Lodge	3	0	0	0

Those respondents who selected motorboating options were more likely than the norm to have come to the area in campervans. Of those who chose one of the motorboating options, 26% had arrived in the area by campervan compared with only 12% of all respondents who arrived by campervan.

Of those who selected guided motorboating, 55% used at least one information source to plan their trip. Those who did use at least one information source used a mean of 3.4 sources each, which is considerably higher than the average for the survey as a whole (2.4 sources each). However, the relative use of different information sources was very similar to the aggregate results of the survey. The most popular information sources for this group were guide books (8 respondents), recommendations from friends or family (7 respondents) and brochures (6 respondents).

Those who selected guided cruise with fishing used common information sources such as guide books and information centres less than the cohort as a whole but made more use of recommendations in particular. These respondents used an average of 2.3 information sources each compared to the norm of 2.4.

Those who selected guided cruise without fishing used an average of 3.0 information sources each. These respondents used brochures and information centres less than the norm for the survey but used the internet and recommendations from friends and family substantially more.

Kayaking & rowboating

Fifty-six individuals reported going (or intending to go) kayaking or rowboating during their trip: 11 respondents specified kayaking, 12 specified rowboating, 1 had been out in an inflatable kayak, and the remaining 32 respondents did not specify which of these activities they had done or were planning to do.

Those undertaking at least one of these activities had an average age of 42 (somewhat younger than the whole cohort at 48) and those known to be participating in rowboating had an average age of 37. It should be noted that most of those who reported going rowboating had done so on Lake Waikareiti, which is about an hour's walk from the road (one way), along a footpath with a quite steep gradient, and therefore requires a greater level of fitness than is required to go rowboating alone.

Of those who went kayaking or rowboating, 82% were domestic visitors; 76% of the cohort as a whole were domestic visitors, so domestic visitors were slightly more likely to go kayaking or rowboating than were international visitors.

While one in every two attached visitors went kayaking or rowboating, only one in four familiar visitors and discovering visitors did so. Seventeen respondents are known to have hired equipment to go kayaking or rowboating, and 20 are known to have had access to privately owned equipment (not all respondents reported on the ownership of equipment). Of those individuals who are known to have had access to privately owned equipment, 12 (60%) were attached visitors. Those visitors who have access to privately owned equipment are more likely to undertake an activity than those who have to hire equipment, so it is unsurprising that attached visitors (who appear most likely to own equipment) are more likely to go rowboating or kayaking than are familiar or discovering visitors.

Rowboating was not included on the activity options list but 104 responses were received from individuals who selected either guided kayaking or independent kayaking (or both) from the options list as activities that they would be likely to undertake in the area.

Chart 12 shows the number of respondents who had actually been, or were planning to go, kayaking or rowboating during their trip. It also shows the number of respondents who selected the different kayaking options from the activity options list.

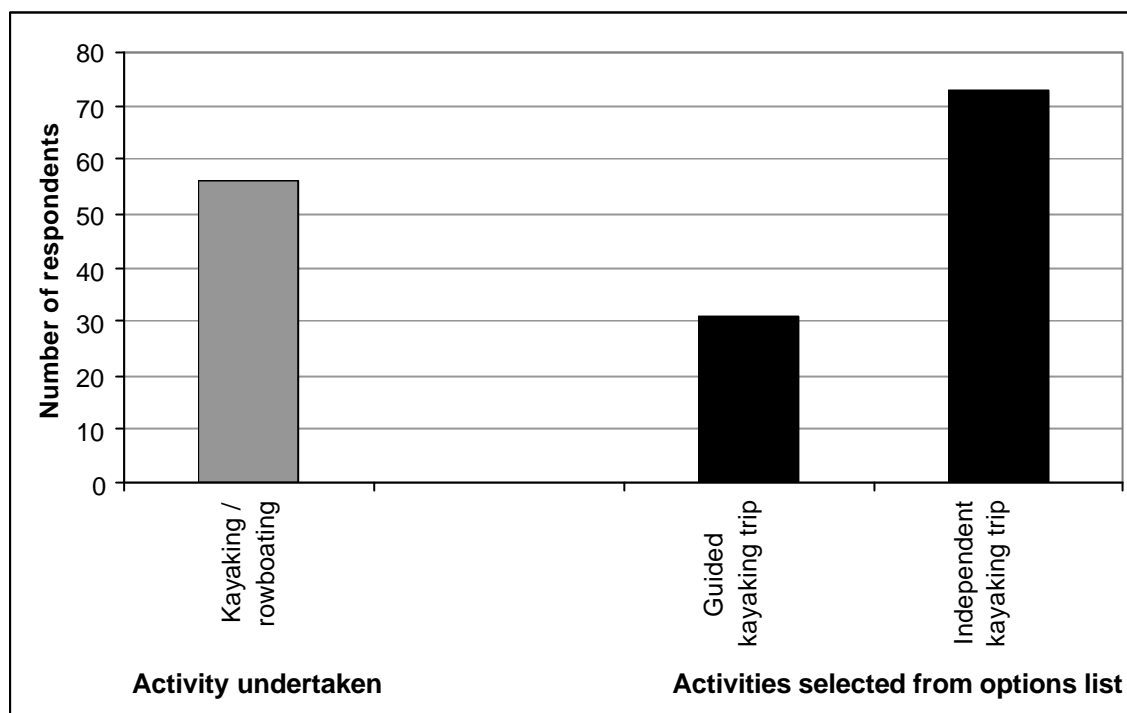
The survey as a whole was composed of 52% discovering visitors, 23% familiar visitors, and 25% attached visitors. Those who selected guided kayaking were predominantly discovering visitors and relatively few were attached visitors. Of those who chose guided kayaking, 58% were discovering visitors, 32% were familiar visitors, and only 10% were attached visitors. In contrast, 49% of those who chose independent kayaking were discovering visitors, 21% were familiar visitors, and 30% were attached visitors.

Asking whether respondents are more interested in guided or independent kayaking is not the same as asking whether they need to hire equipment or not. Someone with their own equipment could easily employ a guide just as someone who hired equipment could go out for a paddle without a guide. For this reason it cannot be assumed that attached visitors are more strongly represented in the independent kayaking category and discovering visitors in the guided kayaking category because of equipment ownership.

It may be that discovering visitors would prefer a guide to plan an appropriate route and explain the local context of the trip, whereas attached visitors feel they know the area well enough to explore independently. However, those visitors with their own equipment (more likely to be attached visitors)

may be more confident and comfortable with their own kayaking abilities and so are less likely to feel they need the support and accompaniment of a guide.

Chart 12: Kayaking and rowboating undertaken or planned and kayaking options selected from the activity options list

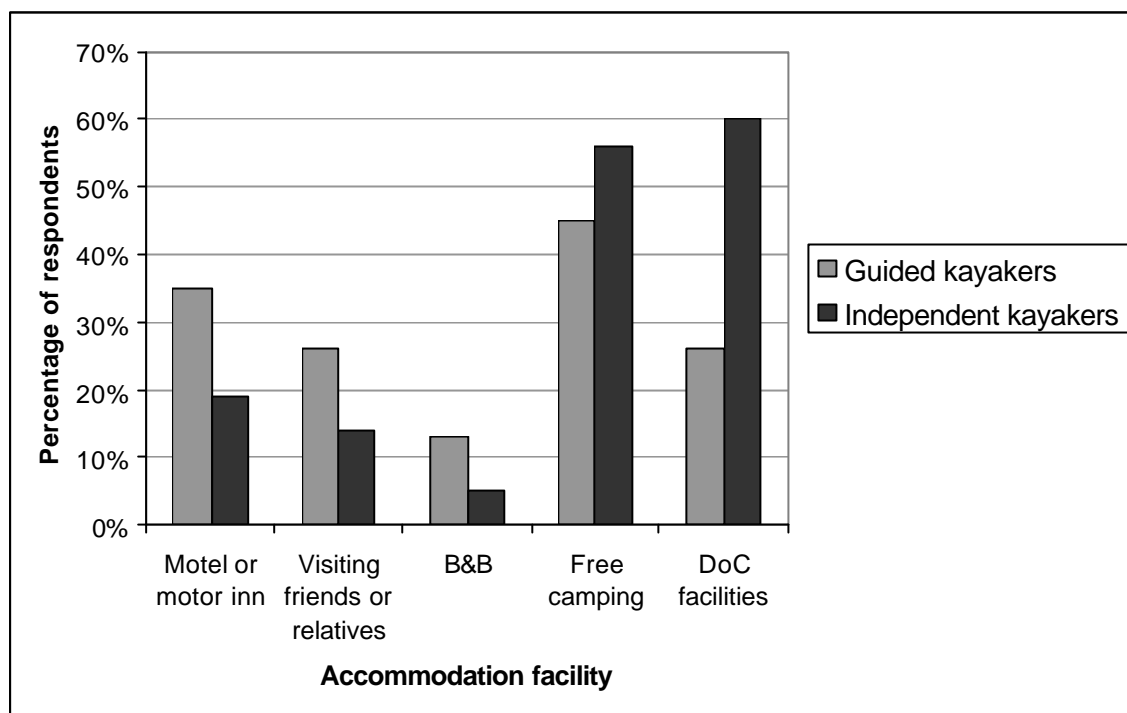


Compared with the cohort as a whole, female, domestic visitors were slightly overrepresented among those who chose guided kayaking. In contrast, male, overseas visitors were slightly overrepresented among those who chose independent kayaking.

Although those individuals who selected kayaking from the options list have in most respects very similar characteristics to those of the survey cohort, there were some small differences between the accommodation options chosen by those who opted for guided kayaking and the accommodation options chosen by those who opted for independent kayaking.

Those respondents who chose guided kayaking thought more favourably of motels, visiting friends and relatives, and staying in B&Bs, and less favourably of free camping and DOC facilities, than did those who had chosen independent kayaking. This is illustrated in Chart 13.

Chart 13: Differences between accommodation options selected by those who selected guided or independent kayaking



Horse trekking

Only two respondents reported doing any horse riding during their trip. One was male and one was female; one lived in New Zealand, the other in Australia; one was a familiar visitor and one was an attached visitor.

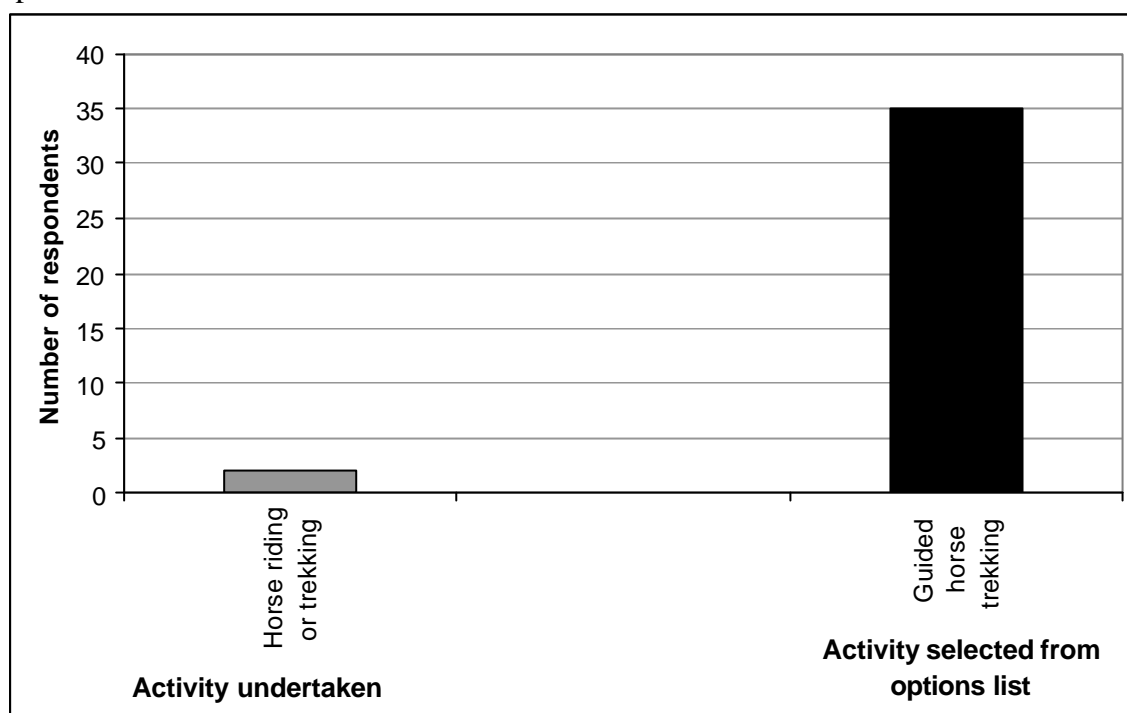
Although only two respondents had been horse riding, a number saw horse riding on the survey show cards (see questionnaire and show cards in Annexe A) and asked whether horse riding was available in the area. This response suggests some visitors would have gone riding had they known that opportunities to do so were available.

Chart 14 shows the number of respondents who had actually been, or were planning to go, horse trekking during their trip. It also shows the number of respondents who selected horse trekking from the activity options list.

Thirty-five respondents chose guided horse trekking from the activities options list as one of the three activities they would be most likely to do if all those on the options list were available in the area. Those respondents were predominantly domestic (89%) and female (74%).

A number of respondents indicated their children would be interested in horse trekking but they themselves would not – suggesting there may be a market for trekking trips specifically for children. However, of the 35 respondents who chose horse trekking only 14 were travelling with children aged from 6 to 17 years old. This suggests there may also be a market for horse riding trips targeted at adults.

Chart 14: Horse trekking undertaken or planned and horse trekking selected from the activity options list



Of those who selected horse trekking from the options list, 49% were discovering visitors (51% norm), 17% were familiar visitors (25% norm), and 34% were attached visitors (24% norm). While discovering visitors account for nearly half this group, attached visitors are strongly represented compared with their numbers in the survey as a whole.

In terms of accommodation choices and use of information sources those who selected horse trekking from the activities options list are similar to the survey cohort as a whole.

Marae visits

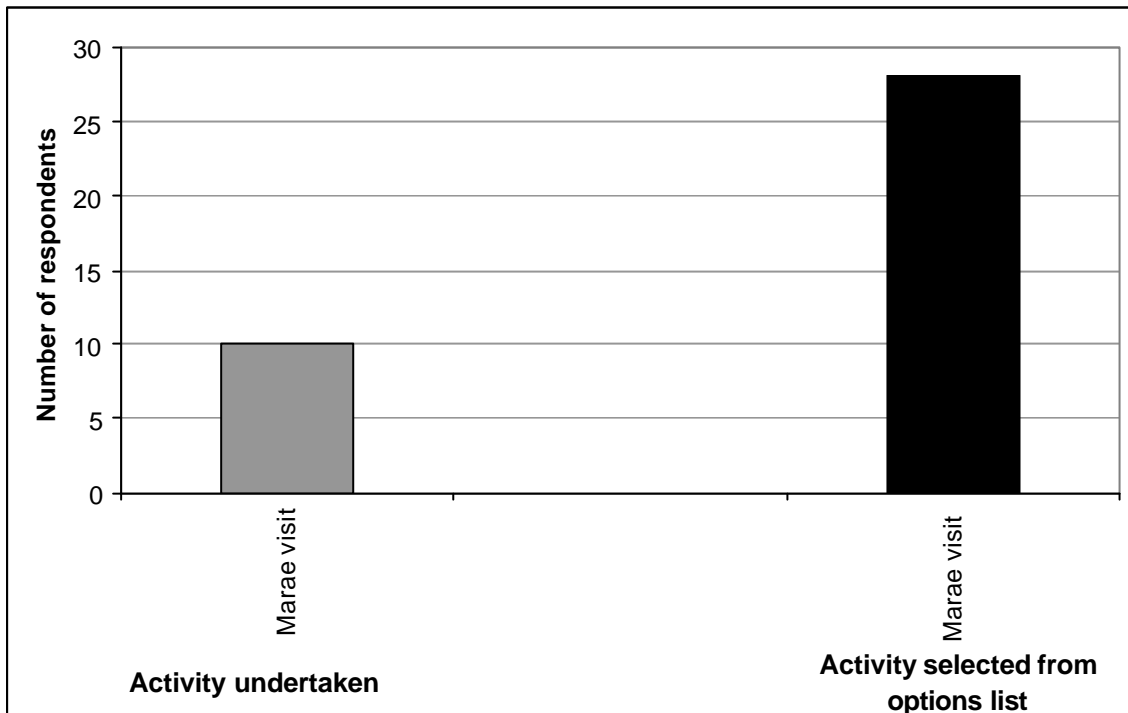
Ten respondents had visited (or were intending to visit) a marae in the region during the trip on which they were surveyed. Of these respondents 8 were female, 2 were male. Two of the female respondents were from overseas (the Czech Republic and Germany); the other 6 female respondents and the 2 male respondents were domestic visitors. Of the respondents undertaking a marae visit, 5 were attached visitors, 3 were discovering visitors, and 2 were familiar visitors.

The average age of visitors to a marae was 41, compared with an average of 48 for the whole sample.

Of the people visiting a marae, 40% (4 out of 10) were Maori, compared with only 7% (14 out of 191) who were Maori or had strong Maori connections in the cohort as a whole⁴⁰.

Chart 15 shows the number of respondents who had actually been, or were planning to go, to a marae during their trip. It also shows the number of respondents who selected marae visit from the activity options list.

Chart 15: Marae visits undertaken or planned and marae visits selected from the activity options list



From the activities options list, 28 respondents chose marae visit. Of these, 61% were female; this compares to 53% of the overall sample for the survey who were female.

Of those who actually visited a marae, 20% were male whereas, of those who expressed an interest in visiting a marae, 39% were male. The gender bias seen in those expressing an interest in visiting a marae and, more clearly, in those who had actually visited a marae, may not hold true in larger samples; however, it does suggest the clientele for a marae visit may be predominantly female.

While only 20% of those actually visiting a marae were international visitors, 36% of those who expressed an interest in visiting a marae were international visitors. The differences between the

⁴⁰ Three respondents reported that, while not Maori themselves, their spouse or partner and children are Maori and so they consider themselves to have a strong connection to Maoridom.

demographic profiles of those choosing a marae visit from the activities options list and the profiles of those actually visiting a marae may be indicative of the existence of obstacles to visitation for certain groups of tourists.

Of all international respondents, 4% had visited a marae, and 22% expressed an interest in doing so. Of all domestic respondents, 6% had visited a marae, and 12% expressed an interest in doing so. There may be greater potential for growth in promoting marae visits to international visitors than to domestic visitors.

A number of international visitors asked the surveyors to explain what the word 'marae' meant and once it had been explained some of these visitors appeared fairly positive about the idea of undertaking a marae visit. While the survey was being conducted there was a large sign by the side of SH38 to the north west of Lake Waikaremoana advertising marae stays. Visitors who did not know what the sign meant were unlikely to have stopped. A lack of recognition and understanding of Maori words by foreign visitors is an issue which has been identified in other research (Fitt 2007; Wilson et al. 2006). Similarly, a number of respondents commented that, while they knew what a marae was, they had not known that it was possible to stay on a marae⁴¹; again this lack of knowledge may be preventing some potential visitors from engaging in marae visits.

While 5 out of 10 of those who actually visited a marae were attached visitors, only 3 of the 28 respondents who expressed an interest in visiting a marae were attached visitors. In contrast, while 3 of the 10 respondents who had actually visited a marae were discovering visitors, 18 out of 28 of those who expressed an interest in visiting a marae were discovering visitors. Discovering visitors may be confronted with obstacles, similar to those experienced by international visitors, which make it difficult for them to undertake marae visits in the area. In particular, discovering visitors may not know how to go about gaining access to a marae in the area.

Unsurprisingly, marae accommodation was selected by a higher percentage of those expressing an interest in marae visits than by respondents expressing an interest in any other activity from the options list. However, only 32% of those who expressed an interest in marae visits chose marae accommodation as one of their top three accommodation choices. Commercial camp and DOC facilities were the most popular accommodation choices for those interested in marae visits.

Those visitors choosing marae visit from the activities options list had used a mean of 2.6 information sources each before arrival in the area⁴² – this is slightly higher than the mean number of information sources used by the whole survey cohort. The most popular information sources for those interested in visiting a marae were guide book (14 respondents), information centre (11 respondents), and brochure (9 respondents).

Conservation or nature talks

While conservation or nature talks were included on the activities options list, they were not included on the cue card used to prompt respondents about activities they had actually participated in during

⁴¹ This is discussed in more detail in section 3.5, 'Accommodation'.

⁴² Includes only visitors who had used at least one information source.

their trip. No respondents reported actually attending a conservation or nature talk during this visit and no such activity was known to be available in the area at that time.

Fifty respondents selected conservation or nature talks from the activities options list. Of these respondents, 35 (70%) were female. As regards visitor classification and origin, the respondents selecting a conservation or nature talk were very similar to the survey cohort as a whole.

Respondents selecting nature or conservation talks had an average age of 57 compared with the average age for all respondents of 48⁴³.

The most popular accommodation types for those interested in conservation or nature talks were commercial camp ground (36 respondents), DOC facility (24 respondents) and motel (16 respondents). Of all respondents, 40% selected free camping from the accommodation options list but only 28% of those selecting nature or conservation talks chose this option. This information may be used to select popular locations for talks or target groups for marketing materials.

Those choosing conservation or nature talks had used a mean of 2.9 information sources each before arrival in the area⁴⁴. This is lower than the mean number of information sources used by either those selecting motorboating or a guided cruise without fishing; however, it is higher than the mean for all other activities. This suggests these visitors are well informed and like to seek out information about the places they visit. The sources most commonly used by these respondents were information centre (23 respondents), guide book (20 respondents), brochure (17 respondents), and recommendation from friends or relatives (17 respondents).

Film about the area

As with conservation or nature talks, no respondents reported viewing a film about the area during the visit in which they were surveyed. Some respondents mentioned they had previously seen a slide show about the area at the DOC Visitor Centre in Aniwanuiwa but reported that the slide show was no longer showing⁴⁵.

Twenty respondents selected a film about the area from the activities options list. These visitors were predominantly female (60%), and the majority were domestic visitors (85%).

Of the visitors selecting the film from the options list, 25% were familiar visitors, which is roughly proportional to the number of familiar visitors in the survey cohort. However, more attached visitors chose the film than did discovering visitors. Fifty-two percent of respondents to the survey were discovering visitors but only 40% of those selecting the film were discovering visitors. In contrast, 25% of respondents to the survey were attached visitors but 35% of those selecting the film were

⁴³ The introduction to section 3.6, 'Activities', explains that the less physically demanding activities on the options list may be over-subscribed by older respondents due to the small number of sedentary or low impact options listed.

⁴⁴ Includes only visitors who had used at least one information source.

⁴⁵ DOC staff at the Visitor Centre advised that the show is in need of major repairs and new slides. The future of the show is being considered as part of a major review of the Visitor Centre and its displays, which is currently under way.

attached visitors. It is interesting to note that while attached visitors use fewer information sources than visitors who make less regular trips to the area, the attached visitors are still interested in watching a film about the area they are visiting.

Respondents selecting film about the area had an average age of 59 compared with the average age for all respondents of 48⁴⁶.

More of the visitors selecting the film from the activities options list selected the traditionally more expensive and better provisioned accommodation options than was the norm for the survey (Table 45). This choice of accommodation options seems linked to the age of the group of respondents selecting the film. This group of respondents was older than the average for the survey and the accommodation options selected by them are among those picked by older respondents (see Table 29).

⁴⁶ Earlier in section 3.6, 'Activities', it was explained that the less physically demanding activities on the options list might be over-subscribed by older respondents due to the small number of sedentary or low impact options listed.

Table 45: Accommodation preferences of those selecting a film about the area from the activities options list

Accommodation type (selected from the accommodation options list)	Percentage of all respondents selecting each accommodation option	Percentage of those who selected a film who also selected each of the accommodation options
Motel/Motor Inn	30	45
Hotel	5	10
Serviced Apartment	5	10
Exclusive/Luxury Lodge	4	10

Combination trips

Each respondent was asked to select 3 activities from the activities options list. Looking at the combination of activities respondents chose may provide some insight into complementary activities, possible multi-activity trips, and potential marketing strategies. For example, if it is known that individuals who go on guided overnight walks are also interested in kayaking trips then managers of businesses offering relevant services may choose to engage in joint advertising (i.e. by linking to each others' internet sites, placing brochures at each others' offices or co-funding magazine adverts). They may also choose to offer discounts to visitors who undertake both activities in the same trip or even to offer trips where both activities form part of the same excursion – for example, a guided overnight trip where participants walk some of the way and kayak some of the way.

In some cases activities may be competing rather than complementary. For example, respondents who chose guided day tramp and guided overnight tramp might be unlikely to undertake both those activities and would be more likely to do one or the other. This survey does not show which activities are complementary and which are competing, and to allow business to benefit from opportunities for collaboration further investigative work may be needed.

Table 46 shows how many respondents chose each two-activity combination. The top right cell, for example, shows how many respondents chose both a guided overnight tramp and a film about the area (1). Where the column heading and row heading are the same (such as in the top left cell) the cell shows the total number of individuals who chose that one activity (guided tramp overnight was chosen by 12 respondents). So the top row tells us that 12 individuals chose a guided overnight tramp and 1 of those also chose a film about the area. The top row also shows that the activity most commonly chosen by those who had also chosen a guided overnight tramp was a marae visit.

The table shows that the most popular activity combinations are:

- Independent kayaking trip and independent overnight tramp (40 respondents)
- Independent kayaking trip and independent day tramp (35 respondents)
- Independent day tramp and independent overnight tramp (29 respondents)
- Independent fishing trip and independent kayaking trip (24 respondents)
- Independent fishing trip and independent day tramp (22 respondents)
- Independent day tramp and conservation or nature talk (21 respondents)

These combinations are the most popular, in part because they include the most popular activities. However, from the table, links between less popular activities can also be identified, for example, of the 20 respondents who chose guided day tramp, 13 (65%) also chose conservation or nature talk, two activities that could probably easily be combined into a single product.

Table 46: Number of respondents selecting both of two activities from the activity options list

	Guided tramp overnight	Guided tramp day only	Independent tramp overnight	Independent tramp day	Guided fishing trip	Independent fishing trip	Guided hunting trip	Independent hunting trip	Guided motorboat trip	Guided kayaking trip	Independent kayaking trip	Guided cruise with fishing	Guided cruise without fishing	Guided horse trekking	Marae visit	Conservation or nature talk	Film about the area
Guided tramp overnight	12	4	0	3	1	2	1	0	1	3	1	2	0	3	5	4	1
Guided tramp day only	4	20	1	5	1	2	0	0	4	2	0	0	3	4	4	13	2
Independent tramp overnight	0	1	70	29	6	17	0	6	1	8	40	4	2	11	7	10	2
Independent tramp day	3	5	29	84	4	22	0	1	7	10	35	1	7	7	11	21	7
Guided fishing trip	1	1	6	4	26	6	2	2	3	7	7	4	0	5	4	2	1
Independent fishing trip	2	2	17	22	6	54	2	8	4	3	24	2	1	6	4	4	4
Guided hunting trip	1	0	0	0	2	2	5	1	0	2	1	0	0	2	1	0	1
Independent hunting trip	0	0	6	1	2	8	1	12	0	1	5	0	0	1	0	0	1
Guided motorboat trip	1	4	1	7	3	4	0	0	20	0	1	3	2	3	4	5	3
Guided kayaking trip	3	2	8	10	7	3	2	1	0	31	4	7	0	10	4	5	1
Independent kayaking trip	1	0	40	35	7	24	1	5	1	4	73	4	3	12	5	7	3
Guided cruise with fishing	2	0	4	1	4	2	0	0	3	7	4	18	0	1	1	4	2
Guided cruise without fishing	0	3	2	7	0	1	0	0	2	0	3	0	12	1	0	5	1
Guided horse trekking	3	4	11	7	5	6	2	1	3	10	12	1	1	35	3	4	2
Marae visit	5	4	7	11	4	4	1	0	4	4	5	1	0	3	28	11	3
Conservation or nature talk	4	13	10	21	2	4	0	0	5	5	7	4	5	4	11	50	12
Film about the area	1	2	2	7	1	4	1	1	3	1	3	2	1	2	3	12	20

3.7 Guiding

This section, considering preferences for guided, accompanied or independent activities, challenges the conventional wisdom that international visitors are more interested in guided activities than are domestic visitors. The section also highlights some findings on respondent preferences for guides of local origins and cultures.

Respondents to the survey were asked which of a series of activities they would be most likely to do in the Lake Waikaremoana area if all the activities on a list they were shown were available. Some of the activities on the list were guided, some were independent, and some were left unspecified although (by nature of the activity) were likely to involve the accompaniment of a person with authority or knowledge. The activities were as follows.

Guided activities

- Overnight tramp
- Day tramp
- Fishing
- Hunting
- Motorboating
- Kayaking
- Cruise (with fishing)
- Cruise (without fishing)
- Horse trekking

Independent activities

- Overnight tramp
- Day tramp
- Fishing
- Hunting
- Kayaking

Accompanied activities

- Marae visit
- Conservation or nature talk
- Film about the area

As there were different numbers of guided, independent and accompanied activities, the absolute numbers of respondents choosing options from each section are not comparable; however, the proportions of respondents with different characteristics choosing the options can be considered.

It has been suggested (although largely in an anecdotal sense) that domestic visitors in New Zealand are very independent in the activities they undertake and are rarely interested in organised or guided activities (Horn 2006). While 63% of domestic visitors chose at least one guided activity from the activities options list, only 49% of international visitors did so. Of all the instances of a guided activity being chosen, 84% were chosen by a domestic visitor. In this sample, domestic visitors were more likely to express an interest in guided activities than were visitors from overseas. In contrast, international visitors were more likely to show an interest in both independent and accompanied activities than were domestic visitors.

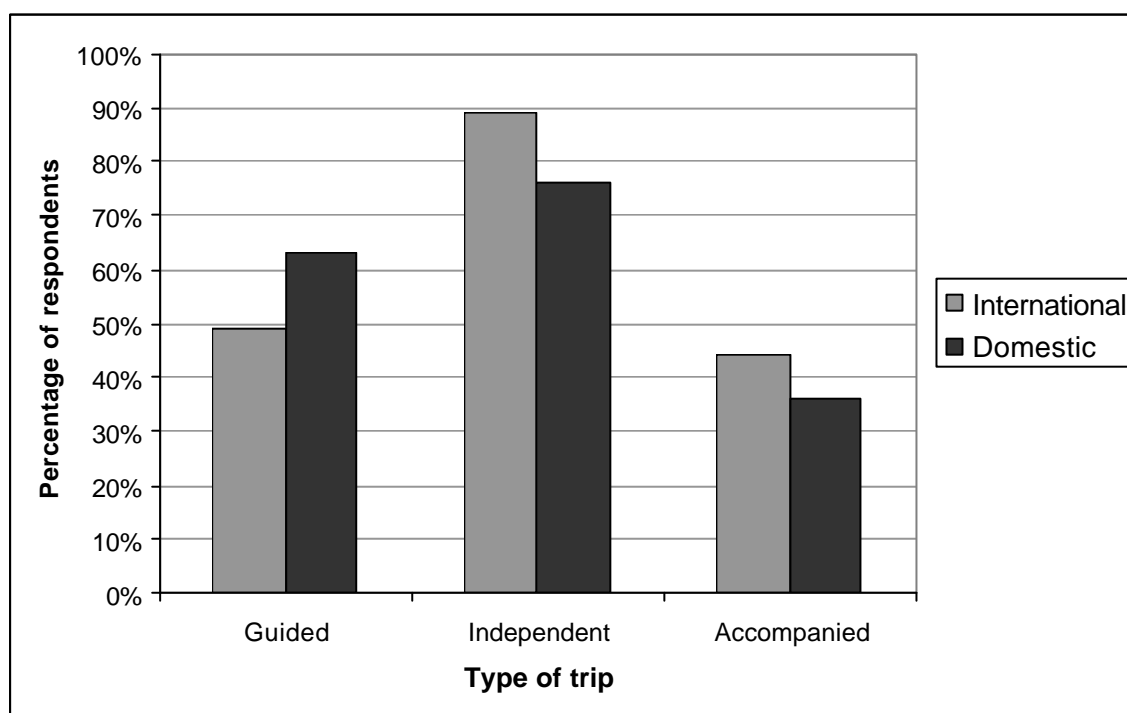
It should be noted that activity costs (including prices and the time and equipment needed to undertake an activity) were not discussed during the survey. Other research has suggested that domestic visitors holiday with a lower budget than international visitors and that this may impact on their attitudes to commercial tourism products (Wilson et al. 2006). Price sensitivity could mean that

while domestic visitors may express an interest in an activity when price is not discussed, this interest may not be maintained when prices are introduced. Respondents may have changed the selections they had made had they been shown relative prices for the different guided options and the independent alternatives.

Over three-quarters of both domestic and international visitors selected at least one independent activity from the activities options list. As less than half the activities available for selection were independent activities, it is interesting that most visitors selected at least one of these as part of their three choices. Each independent option was selected a mean of 59 times compared with 33 times for each accompanied activity, and 20 times for each guided activity.

Chart 16 shows the different activity types and the percentage of domestic and international visitors choosing at least one activity of that type.

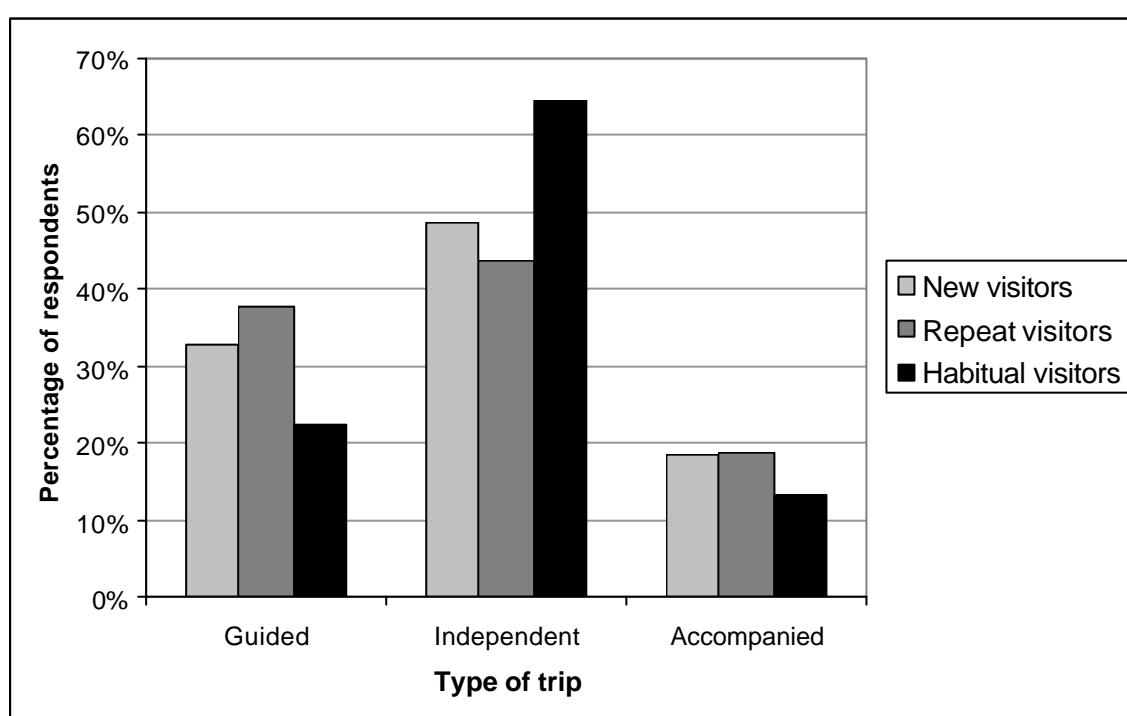
Chart 16: Percentage of domestic and international respondents choosing at least one activity from the guided, independent and accompanied categories⁴⁷



⁴⁷ It should be remembered that respondents were shown a list including different numbers of the different types of activities available (9 guided activities, 5 independent activities and 3 accompanied activities). This means they did not have an equal likelihood of selecting activities from the different categories. The chart shows the comparison between the choices of domestic and international respondents but does not show absolute preferences for different activity types.

Chart 17 shows the percentage of discovering, familiar and attached visitors who chose at least one activity from the guided, independent and accompanied categories. The preferences of discovering and familiar visitors are similar for each type of activity (guided, independent or accompanied), although discovering visitors chose slightly more independent activities and slightly fewer guided activities than did the familiar visitors. Attached visitors show a stronger preference for independent activities, with 64% of the activities they selected falling into the independent category. While there is only a small difference between the proportion of independent activities selected by discovering and familiar visitors, these figures suggest those with more extensive visit histories and greater levels of personal attachment to the area are less likely to seek guiding or interpretation than are newer and less attached visitors.

Chart 17: Percentage of discovering, familiar and attached visitors choosing at least one activity from the guided, independent and accompanied categories⁴⁸

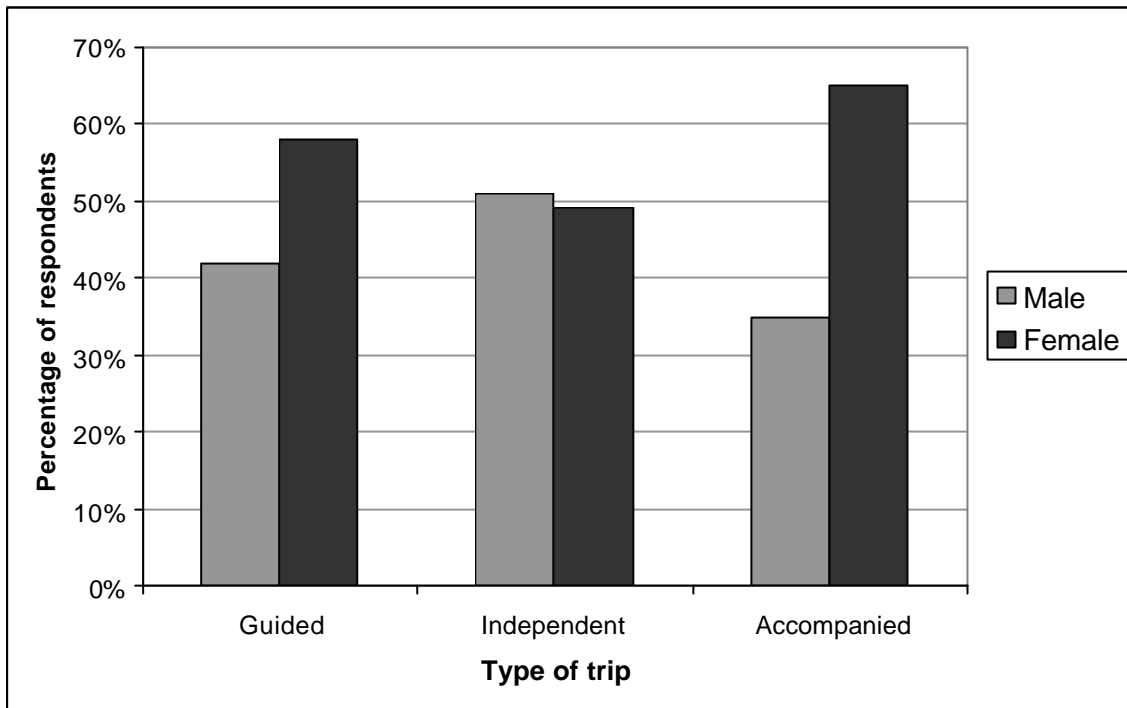


Guided activities and accompanied activities were more likely to be chosen by women, whereas independent activities were more likely to be chosen by men. Of the guided activities selected, 58%

⁴⁸ It should be remembered that respondents were shown a list including different numbers of the different types of activities available (9 guided activities, 5 independent activities and 3 accompanied activities). This means respondents did not have an equal likelihood of selecting activities from the different categories. The chart shows the comparison between the choices of discovering, familiar and attached visitors but does not show absolute preferences for different activity types.

were selected by women, and women also selected 65% of the accompanied activities. In contrast, women only selected 49% of the independent activities selected.

Chart 18: Percentage of male and female respondents choosing at least one activity from the guided, independent and accompanied categories⁴⁹



After selecting activities from the options list, any respondents who had selected any guided activities were asked some additional questions about their guide preferences for the guided trips they had selected.

Q: If all were equally well informed, would you prefer to have a New Zealander or a foreigner as a guide for activity X or do you have no preference? [Where activity X is one of the guided options chosen by the respondent in answer to the previous question]

Respondents who had selected more than one guided option were asked this question for one of the activities they had selected and were then asked if their answer would change depending on the

⁴⁹ It should be remembered that respondents were shown a list including different numbers of the different types of activities available (9 guided activities, 5 independent activities and 3 accompanied activities). This means respondents did not have an equal likelihood of selecting activities from the different categories. The chart shows the comparison between the choices of male and female respondents but does not show absolute preferences for different activity types.

activity being undertaken. Only two respondents changed their answer to this question depending on the particular activity being discussed.

One respondent chose to have a New Zealander as a guide for a kayaking trip but had no preference of guide for a cruise with fishing. The respondent was not asked the reason for this difference and it may have been that she changed her mind about the overall choice of a guide rather than actively differentiated between the guide needed for the different activities.

Another respondent specified that a visit to a marae would have to be guided⁵⁰ and that, while she had no preference about the ethnicity or origin of the guide for the tramping or kayaking trips she had selected, a guide for a marae visit would have to be a New Zealander and a Maori.

No respondents chose to have a foreigner as a guide; all selected either New Zealander or said that they had no preference. This may have been a function of the wording of the question as it seems likely that a guide from Germany, for example, leading tours in German would attract some German visitors.

Of guide preferences⁵¹, 58% preferred New Zealanders, and the remaining 42% expressed no preference.

Those respondents who had selected New Zealanders were then asked a follow-up question:

Q: You chose to have a New Zealander as a guide. Again, if they were equally well informed, would you prefer to have someone from the local area, someone from elsewhere in New Zealand or do you have no preference?

Someone from the local area was preferred by 88% of selections, and no preference was expressed by the remaining 13%⁵².

Finally, all respondents who had selected at least one guided option were asked:

Q: If you knew that a guided activity contained any Maori content would you prefer to have a Maori guide, would you prefer to have a non-Maori guide with a good knowledge of the Maori content or do you have no preference?

Of the 115 respondents who were asked this question, 56 (49%) reported they would prefer to have a Maori guide, 57 (50%) said they had no preference, and 2 (2%) said they would prefer to have a non-

⁵⁰ Marae visit was not explicitly labelled as guided in the questionnaire and other respondents were not asked to specify a guide preference for a marae visit; however, this respondent asserted that the trip would have to be guided and that the nature of the trip influenced the choice of guide.

⁵¹ Some respondents selected two or three guided activities. The figure shown here includes the guide preferences for each activity chosen rather than for each respondent.

⁵² Figures do not sum to exactly 100% as a result of rounding.

Maori guide⁵³. It should be noted that while only 2 respondents said they would prefer to have a non-Maori guide there were several other respondents who, surveyors suspected (from expression, body language, tone or comments between companions), would have preferred to have a non-Maori guide but selected the 'no preference' option from political correctness. This was not questioned or challenged due to the sensitivity of the subject and the inappropriateness of making such a challenge in a very public survey location.

Both respondents who selected non-Maori were domestic visitors, both were aged between 55 and 65, one was male and one was female, both were discovering visitors.

The demographic characteristics of those who chose Maori and those who said they had no preference were very similar as shown in Table 47.

However, a gender difference is apparent, with 62% of males selecting no preference and only 36% selecting Maori, compared with 40% of females selecting no preference and 58% selecting Maori.

Table 47: Preference for Maori guides by demographic characteristics of respondents

	Percentage choosing a guide who is...		
	Maori	Non-Maori	No preference
Discovering visitors (n=64)	52	3	45
Familiar visitors (n=30)	33	0	67
Attached visitors (n=21)	62	0	38
Domestic visitors (n=93)	48	2	49
International visitors (n=22)	50	0	50
Male visitors (n=50)	36	2	62
Female visitors (n=65)	58	2	40
All respondents (n=115)	49	2	50

This might suggest that marketing aimed at women should focus more on the Maori element of trips than should marketing aimed at men.

⁵³ Figures do not sum to exactly 100% as a result of rounding.

3.8 Wish list

Finally, respondents were asked whether there were any facilities or activities not available in the area that they would like to see there in future. This section presents some of the common responses to this question.

Q: Are there any facilities or activities that are not currently available in the Lake Waikaremoana area but which you would like to see here in future?

The resulting range of suggestions forms a kind of ‘wish list’ for visitors to the area. Some respondents made more than one suggestion and some suggestions are shown more than once below – for example, a request for guided kayaking trips will be shown below under both requests for guided activities and for kayaking trips or hire.

Eighty-five respondents (45%) made at least one suggestion of something new or improved they would like to see in the area in future. The remaining 106 respondents (55%) did not make any suggestions, although some commented on the facilities already available and others on changes they hoped would not be made in the area.

Forty-three respondents (23%) made at least one comment, suggesting they did **not** want the area to become more developed or more popular. Of these respondents, 17 were discovering visitors (17% of all discovering visitors), 9 were familiar visitors (20% of all familiar visitors), and 17 were attached visitors (35% of all attached visitors). Comments in this category included:

The more remote it stays the better

I don't want to see it developed

Even unpaved roads are quite good – you have to be committed to come here

Respondents were particularly divided on the issue of the quality of the road. Seventeen respondents commented on the quality of State Highway 38 when discussing the ‘wish list’ question but while 10 were keen to see the road improved, 7 preferred it to remain in its current state as a deterrent to increased tourism. Those who wanted the road improved were mostly discovering visitors and those who did not were mostly attached visitors. This is not surprising, as it is unlikely those visitors who find the road quality to be a significant disincentive to visitation would have visited regularly enough to build up sufficient connection to the area to be classed as attached visitors.

Road improvements have been recognised to bring increased tourism to rural areas (Carter 2005); however, such improvements can also bring changes to the type of tourism in the area as well as changes to the volume. It may be the case that many of the attached visitors would stop visiting the Lake Waikaremoana area if the road was improved, instead choosing other remote destinations for their holidays. However, both the limited availability of comparatively rural destinations and the personal connection some attached respondents clearly feel to the area mean this process may be slow to occur. Improvements in road quality may also result in greater numbers of discovering and familiar visitors arriving and may even result in the development of a new class of attached visitors who are currently deterred from more regular visitation by the difficulty of the journey.

While improvements in roading could almost immediately eliminate the deterrent of the physical difficulty of visiting the area, it could take much longer for a decline in habit and personal connection to the area to take effect. If the roads into the area were improved immediate increases in visitation might not be sustained and visitation might take some time to settle into a new pattern.

Current plans include gradual improvements to sections of the road. These will slowly improve the quality of the road and the ease and speed of accessing the Lake Waikaremoana area. If road improvements are undertaken slowly then rapid changes in patterns of visitation may not be seen and more gradual increases in visitation and changes in attached visitor behaviour may occur.

The most popularly requested single new facility was a café, restaurant or other eatery. Only 16 respondents (8%) mentioned this but it seems likely that other respondents did not think of it but would use a restaurant if one was available. While it is possible for visitors to purchase meals at one of the accommodation facilities in the area⁵⁴, numerous visitors seemed unaware that this facility even existed. Ten percent of attached visitors, 9% of discovering visitors, and 5% of familiar visitors expressed an interest in the development of an eatery.

Facilities at the Lake Waikaremoana Motor Camp include a kitchen, laundry, toilets, showers, grassed areas, and a public telephone. Fourteen respondents commented on these facilities or made suggestions for their improvement. Twenty-seven visitors made suggestions for new or improved services that could be offered by DOC. Suggestions here included improved accommodation facilities (8 respondents), improved toilet facilities (3 respondents), and better tracks or walk signage (3 respondents). A number of respondents also commented that they would like to see more information (or informative activities) available to visitors including:

- ? Information on trees and birds
- ? Information on Maori history and culture
- ? Maps specifically for kayakers (those designed for walkers are not ideal)
- ? Ranger programme
- ? Interpretation of landscape and history
- ? Guided walks
- ? Film about the area (which was unavailable at the time of the survey)
- ? Night treks to see kiwis and glow worms
- ? Maps and information stations at entrances to the National Park (as seen in parks in US).

New facilities suggested included a bar or place to buy alcohol (6 respondents), better shop facilities (6 respondents), more Maori cultural activities (6 respondents), guided activities (6 respondents), kayak trips or hire (3 respondents), fishing trips or equipment hire (3 respondents), and horse trekking (1 respondent).

Some respondents were clearly not aware of some of the facilities and activities currently available in the region; for example, kayak hire, fishing trips and horse trekking are all available within the local area (although availability may be limited as these are often very small businesses with limited staff cover). Where possible, surveyors advised respondents of any relevant opportunities available *after* all the questions on the survey had been answered.

⁵⁴ The meal service is not available every day, and visitors may need to order their meal in advance.

4. Summary of Main Findings

It is hoped this report will be useful both for entrepreneurs wishing to develop tourism in the Lake Waikaremoana area and for stakeholders in the wider tourism industry. This final section is broken into two parts, the first summarises the findings of the research with particular emphasis on those findings that can be used by businesses and business mentors in the study area. The second draws more general conclusions and highlights findings that may be of relevance in other tourist destinations.

4.1 Lessons for local business

This report is part of the Te Tapoitanga Maori project. The project includes research investigating the demand for eco-cultural tourism products and investigations into how to increase supply in line with any identified surplus demand. The project includes mentoring work with some tourism entrepreneurs in the Lake Waikaremoana area. This section of the report summarises and explains some of the key findings with particular reference to their potential application by local entrepreneurs and mentors.

While the research took place in the area immediately surrounding Lake Waikaremoana and this section of the report is targeted at use of the findings in that area, it is likely that tourism in other rural destinations shares many of the features described below. This summary may also serve as a useful basis for investigation into the tourism industry, and as a tool for use in business planning, in other areas.

While the survey was not designed to produce a statistically representative sample it is thought to include a large proportion of the visitors to the Lake Waikaremoana area in the sample periods used⁵⁵.

Catering for seasonal variations

The volume of tourism in the Lake Waikaremoana area is clearly highly seasonal (Department of Conservation 2006, and discussions with local residents and business owners). In addition, this survey suggests differences in the kinds of visitors visiting at different times of year, and local businesses may be able to use this information to devise different products or schedules to suit different visitor types.

Of particular note is that the age profile of visitation during Week 1 of the survey (January) suggests a family holiday destination with a large number of visitors of school age and of 'parent age'. In Week 2 (February) there was an older profile of visitation, with a large proportion of the visitors being over 50 years of age. The two largest 10-year-age groups of visitors in Week 1 were 10 to 19 years of age (70 visitors) and 40 to 49 years of age (76 visitors). In comparison, the two largest 10-year-age groups of visitors in Week 2 were 50 to 59 years of age (47 visitors) and 60 to 69 years of age (47 visitors).

⁵⁵ See section 2.3, 'Methods', for a further discussion of sampling and representativeness.

During Week 1 the researchers observed a number of children and young people who seemed to be bored and spoke to a number of parents who indicated that, while they themselves may not choose an activity, they might choose it for their children. This suggests that as well as a potential market for activities for children and parents to take part in together there may also be a market for activities for children to undertake without their parents accompanying them. Given the age profile of visitation to the area, it may be possible to run children's programmes during family holiday periods and programmes targeted at an older audience during shoulder seasons.

Further investigation into the demand for children's programmes during weekends would be useful. It is possible that demand for independent activities for children would be lower (even in relation to the number of children visiting) at weekends than during school holidays for a number of reasons. Families on shorter trips may have less need for independent activities for children than those on longer trips. Similarly, families may be less willing to spend money on activities during weekends away than during a main summer holiday break.

Service providers wishing to extend their peak season beyond school holiday periods may wish to consider catering specifically to the older group of potential clients visiting in shoulder periods such as survey Week 2. This survey did not consider winter visitation but further work may identify potential client groups in the low season.

Week 2 had a higher proportion of international visitors than did Week 1. International visitors were younger on average than domestic visitors and included almost half respondents aged 30 or less. When designing products likely to appeal to visitors in their early 20s in particular, it will be useful to recognise that a significant proportion of the target market will comprise overseas visitors.

Repeat appeal of activities

An important consideration in terms of tourism product design, especially for activity providers, will be the 'repeat appeal' of the product – that is, the extent to which tourists who visit the area more than once will become repeat purchasers. There is some evidence to suggest a large part of the appeal of some activities is that they are new, novel or one-off opportunities. In contrast, other activities have more repeat appeal and are often undertaken by individuals who have enjoyed the same or similar activities before. For example, other research carried out as part of the Te Tapoitanga Maori programme asked people to explain their preferences for different activities. Individuals who chose a hovercraft trip often expressed a sense that their choice was based on a feeling that the trip would be a unique experience.

...the hovercraft is just something a wee bit different.

[the hovercraft] would be more special. You don't ride a hovercraft every day – it's something out of the ordinary.

In contrast, individuals who chose a kayaking trip were more likely to express a sense that kayaking was something they had done and enjoyed before.

I've done kayaking before and it's lots of fun

I love kayaking

Week 1 included 45% of all discovering visitors, 53% of all familiar visitors, and 67% of all attached visitors, suggesting the provision of activities with repeat appeal is likely to be more important in the peak season than in the shoulder season.

Overall, just under half the respondents to the survey were first-time visitors, so while repeat appeal of activities may be important, there may also be a sizeable market for activities with novel appeal.

The value of 'exploration'

Many of the discovering visitors indicated that accessing the area had involved a high level of effort; this was particularly expressed through comments that respondents would be unlikely to visit again because the journey was difficult. A significant motivation for discovering visitors to the area was that they had not been before, and a significant factor in decisions of whether to return was that there were other areas left to see elsewhere. This strongly suggests visitors have invested time and effort to see this particular location and there is value in simply going to new places. Providers may be able to capitalise on this by offering visitors very location-specific experiences and providing access to even less accessible areas.

The popularity of tramping suggests current visitors value the location itself more than the way in which it is experienced (they are not, for example, seeking the novelty of a hovercraft). Hearing about the history and culture of the area may add value to location specific experiences but discovering visitors, despite their apparent desire to 'explore', showed no more interest in conservation or nature talks or in watching a film about the area than did other visitor groups.

Responses suggest that location plays a large role in the motivations of familiar visitors; however, familiar visitors will be more familiar with the area than will the discovering visitors. Although tramping is still popular with this group, familiar visitors may be attracted by some more novel or unique ways to experience the area.

Interestingly, attached visitors were strongly represented among those who chose certain activities from the activities options list. Attached respondents were overrepresented (compared with their representation in the cohort) among those who selected each of hunting, fishing, horse trekking, and watching a film about the area. It may be that these are activities with more 'activity' appeal than 'location' appeal.

Activity duration

Discovering visitors had a shorter mean length of stay (3.1 nights) than had either familiar (4.0 nights) or attached (5.5 nights) visitors. This may mean that organised activities of a short duration would appeal to them more than longer duration activities. However, of all the visitor types, discovering visitors are the least likely to have definite plans for the night following their visit to the Lake Waikaremoana area. This suggests it may be possible to encourage some discovering visitors to stay in the area for longer through offering products that encourage them to extend their visit.

Guided versus independent activities

Independent activities were more popular with respondents than were guided activities. This was most pronounced among attached visitors, who had a strong preference for independent activities, and least pronounced among familiar visitors, who had only a moderate preference for independent activities.

The preference for independent activities suggests there may be a market for businesses offering equipment hire for those visitors who would prefer to undertake independent activities but do not have the necessary equipment. There may also be a market for semi-independent, or supported, activities such as non-guided tramps on which pack transport and catering are available but during which the actual walking is undertaken independently.

Women appeared more attracted to guided activities than did men, and domestic visitors appeared more attracted than visitors from overseas. As the questions relating to guiding contained no information on the relative prices of guided and independent activities, these results do not take account of the price sensitivities of different groups. The subtleties of this topic may warrant further investigation.

Activity marketing

The majority of visitors arriving in the Lake Waikaremoana area have few, if any, activities pre-booked. This means visitors often have flexible schedules and 'at destination' marketing for activities could be effective. One draw-back with at-destination marketing is that localised businesses are dependent on visitors being attracted to the area in the first place (Stuart et al. 2005). Many of the discovering visitors to Lake Waikaremoana had been attracted into the region by guide books, recommendations or information from visitor centres.

Businesses usually have little control over what is written about them, or their area, in guide books. However, contributions from previous visitors are often included or taken into account by authors. This increases the already significant effect of word of mouth and recommendations. Businesses in the area need to be aware of the importance of providing customer satisfaction to encourage positive recommendations.

The information available at visitor centres in surrounding regions may also be a key to determining whether visitors decide to visit the area. If small individual businesses are not, by themselves, able to supply promotional materials to visitor centres it may be worth, cooperating even with competing businesses to supply those materials by, for example, creating a brochure or poster together. As Gnoth explains, "tourism businesses are forced to network when attracting tourists but compete when they arrive" (Gnoth 2006). For example, two businesses offering boating trips on a lake may join together to promote their lake as a popular boating destination and thereby attract visitors to the area; once visitors arrive in the area the businesses will compete for their custom. It is expected that both businesses will benefit from the initial (cooperative) promotion through rising visitor numbers, even though they may be competing for each of the potential customers who arrives. This state is known as coepetition⁵⁶ – a combination of competition and cooperation.

In a similar way to taking a cooperative approach to advertising the area at visitor centres, businesses may also wish to promote their area through other regional visitor destinations, attractions, accommodation, and transport providers. This survey highlighted Rotorua and Napier as two popular destinations in which visitors spend time before arriving in Lake Waikaremoana. Publicity in these areas may increase the number of visitors who choose to include Lake Waikaremoana in their itineraries.

Transport provision and marketing

None of the visitors surveyed accessed the Lake Waikaremoana region using public transport. Although guide books advise (and locals confirm) that there are shuttle buses available for pick-ups

⁵⁶ This term is widely believed to have been coined around 1994 by Raymond Noorda, the founder of Novell.

and drop-offs to nearby towns, the surveyors did not speak to any visitors who had used these services. Several visitors commented that they had tried to access public transport into the region, had been unsuccessful, and had eventually resorted to renting a vehicle. Transport providers in the area would be well advised to note that their distribution strategies do not appear to be working – for a strategy to work, visitors need to be able to find out about transport while planning their trip and the service needs to be provided reliably, affordably and according to the advertised details. Providers may wish to note that advertising in destinations like Rotorua and Napier, which are popular pre-visit destinations for visitors to Lake Waikaremoana, may allow them to attract visitors who travel with flexible itineraries. To attract those visitors who like to plan in advance which destinations they will visit, transport providers may have to advertise further afield, focusing on the home origins of their target group rather than on popular pre-visit destinations. Common origins of visitors to the survey included Auckland, Gisborne, Wellington and Tauranga.

Once tourists reach the Lake Waikaremoana area, some businesses may wish to attract them to locations outside of the main tourist hubs of Waikaremoana and Aniwanui. Although all the visitors surveyed had their own transport (with the exception of two groups travelling in minibuses whose individual members were not able to move around independently), it should be remembered that having to drive may serve as a significant disincentive to visiting an attraction. There are some clear messages that, visitors, particularly discovering visitors, dislike the long stretches of unsealed road and this may deter them from visiting attractions further afield. Operators based some distance from Lake Waikaremoana and Aniwanui may wish to consider providing a pick-up and drop-off service (perhaps in conjunction with existing shuttle bus operators) so that visitors can choose to let someone else do the driving.

Accommodation provision and marketing

The majority of visitors do stay overnight in the Lake Waikaremoana area and there is a good tie-in between the types of accommodation available and the types desired by visitors to the area. The extent to which there are groups of potential visitors who are put off visiting because their preferred types of accommodation are not available is unclear; however, recent research with inbound operators suggests the lack of availability of quality accommodation is a serious obstacle to the inclusion of the area in packaged itineraries (Doherty, forthcoming). Further research, outside the immediate Lake Waikaremoana area, may help ascertain the extent to which the limited range of accommodation deters other independent and group visitors. Research of this nature could usefully be concentrated in known 'source' areas for visitors, including both the home towns of current domestic visitors and the visitor destinations respondents visited immediately before their arrival in Lake Waikaremoana.

In terms of marketing, businesses might consider that younger people and international visitors appear more flexible at a later stage of trip planning than do older people and domestic visitors. Those visitors who have more flexible itineraries may be influenced by at-destination marketing and it may be possible to tempt them to stay longer than initially planned. In contrast, those with less flexible itineraries will be more influenced by information that reaches them at source or en route and allows them to plan further in advance. For these visitors, it may even be possible to provide information during one visit that influences their booking choices for subsequent visits.

Informing visitors about 'niche' products

Businesses offering niche products, or products a little out of the ordinary, will need to consider providing public information and education about exactly what is available. In particular, those wishing to provide marae-based accommodation or accommodation in a Maori lodge will need to explain what visitors should expect. While most respondents would know what to expect from a campsite or a hotel, there is evidence to suggest they are less sure about whether less common alternatives would meet their needs and wishes.

Regional developments and changing visitation

A final consideration for businesses will be that this survey only included visitors to the Lake Waikaremoana area. As the area changes and develops, the visitors who are choosing the area for their holidays may also change. Many current visitors, particularly those who return to the area again and again, are keen to discourage any major developments in an effort to prevent the loss of the rural, isolated and natural character of the destination. Those wishing to develop the area will need to consider whether they will gain more from new visitors brought by developments than they will lose through the potential loss of attached visitors seeking peace, quiet and isolation.

4.2 Summary and implications for New Zealand tourism

While this report contains data collected from one tourist destination over a short period of time, some of the findings may provide relevant background information and cause for reflection for those in other destinations and for those whose work encompasses national tourism issues.

While some of the findings summarised above for local entrepreneurs may also be useful in other contexts, this section specifically details a few of the surprises and key findings from the survey that are expected to be of principal interest outside the immediate area of Lake Waikaremoana.

Complexity of profile

First, the number and complexity of issues that have arisen in this short and small-scale survey have highlighted the importance of understanding current and target client groups. Researchers and local colleagues have been surprised and interested by some of the findings – which have illustrated that even those with a thorough working knowledge of tourism and those living and working in the case study area have something to learn from a strategic profiling of visitation.

One of the most surprising (and most discussed) findings from the survey has been that similar numbers of men and women participated in fishing trips but much smaller numbers of women expressed an interest in fishing when asked about the kinds of activities that they would most like to undertake. This anomaly cannot be explained from the data initially collected but illustrates some of the complexities in understanding client groups. Anecdotal explanations offered for the participation of women in fishing trips when few women show an interest in fishing include that while men choose to participate in an activity (fishing), women are more motivated by the opportunity to spend time with their families, and in doing so choose to engage in activities that, individually, they would not prioritise. Further research into gender and activity choice would help generate a better understanding of what motivates visitors in their choices between different activities.

It is also clear that understanding motivations for visiting an area could facilitate choices for the provision of services, facilities and activities. Where a desire to experience a new environment is a key driver of visitation, facilitating access to remote and unusual locations could be expected to enhance the visitor experience. Similarly, if respondents express the desire to spend quality time with family or friends, then the provision of opportunities to do this may prove more valuable than the provision of more individually focussed activities and experiences.

Eco-tourism or cultural tourism?

This research is part of a project with a strong focus on eco-cultural tourism. This research showed that the natural environment provided particularly strong motivation for visits to the Lake Waikaremoana area. The culture of the area appears to be a less strong motivation for visits, and this finding is echoed by other New Zealand research that shows the ‘eco’ element of attractions and

activities to be more commonly cited as appealing, or a stronger attraction, than is the 'cultural' element (Wilson et al. 2006; Ryan & Higgins 2006).

Guided or independent activities?

It has previously been suggested that domestic visitors in New Zealand are very independent in the activities they undertake and are rarely interested in organised or guided activities. The findings of this report challenge that perception by showing that, in this case, domestic visitors showed more interest in guided activities than did international visitors. Further research on the needs and wishes of domestic tourists would complement the already extensive body of literature on international tourism in New Zealand.

Road quality and impact on visitation

The quality of access roads into and out of the Lake Waikaremoana area is an issue of some importance to the local tourism industry. Tourists frequently comment on the quality of the narrow, gravel roads but are divided on whether these are a positive or negative attribute of the region. Some tourists argue that the difficulty of access helps preserve the natural and peaceful character of the region, while others complain that the poor road conditions are a barrier to greater use and enjoyment of the area.

This research did not investigate the roading issue in depth but did identify differences between the characteristics and visitation patterns of those who would like to see the road improved and those who prefer to see it maintained in its current state.

Visitors who would like to see the road improved tended to be those who had made few, if any, prior visits to the region and who had little personal attachment to the area. In contrast, visitors who preferred to see the road unchanged tended to be those with extensive visit histories and strong personal attachment to the area.

This difference has highlighted a tension that is likely to exist well beyond the area of the survey. Any developments to a visitor destination are likely to lead not only to changes in visitor numbers, but also, as the character of the destination changes, to changes in the composition of visitation. However, while it could be expected that changes in infrastructure might lead to almost immediate changes in some aspects of visitation, others may be slower to change. For example, if the road through the Lake Waikaremoana area was sealed, the deterrent that difficult travelling conditions presents to some potential visitors would be removed immediately. However, a change in connection felt by attached visitors might be slower to occur. Longitudinal studies are rare in the field of tourism research but may be invaluable in helping ascertain the way in which destination development leads to changes in visitation.

Classifying respondent visit histories

The research also discovered important differences between the motivations and aspirations of visitors with different visit histories in the area. Visitors were divided into three categories – discovering visitors, familiar visitors and attached visitors – and this distinction facilitated the identification of some key differences between visitors.

Discovering visitors were often 'explorers' looking to visit new places and although many liked the area, they recognised that there were many other areas left to visit. Discovering visitors were often including Lake Waikaremoana as part of a longer trip and were most likely to be uncertain about where they would go to after their visit. These visitors were most likely to have booked their

accommodation in advance, were most likely to select guided activities, and were least likely to select independent activities.

At the other end of the spectrum, most attached visitors had visited numerous times and some made comments like

We've just always come here

And

It's become a family tradition

Rather than describing Lake Waikaremoana in terms of natural attributes, attached visitors tended to describe the area in terms of their connection to it. So, for example⁵⁷, rather than using the impersonal:

the scenery is beautiful

An attached visitor might describe the same aspect of the area but in a way in which the visitor, rather than the area, is the subject of the sentence, such as:

I love the scenery

For most attached visitors Lake Waikaremoana was the only destination they would visit during their trip but they were least likely to have booked their accommodation in advance. Attached visitors were also least likely to show an interest in guided activities and most likely to show an interest in independent activities.

Most familiar visitors had been to the area a small number of times before and said they were very likely to return. Familiar visitors' responses usually fell somewhere between those of the discovering and the attached visitors.

This system of classifications could prove to be extremely useful in developing a better understanding of domestic tourism within New Zealand. It could be that visitors who were 'discovering visitors' in Lake Waikaremoana in January 2006 might be 'discovering visitors' in other destinations in subsequent holidays. Their behaviour might be quite consistent across the different destinations which they visit.

Similarly, other destinations may have their own familiar and attached visitors with their own sets of behaviours and characteristics. Research to determine the extent to which discovering, familiar and attached visitation shares the same characteristics in different destinations would be useful. This would help in the development of an improved understanding of the role destination plays in the way in which visitors construct their holidays.

⁵⁷ The examples used here are for illustrative purposes, they are not direct quotations from the survey.

In addition, people who are attached visitors at Lake Waikaremoana may behave like discovering or familiar visitors if they take a holiday elsewhere. Understanding the extent to which visitors assume different roles dependent on the destination they are visiting would also help develop understanding of holiday construction.

5. Concluding Thoughts

Through profiling tourism in the Lake Waikaremoana area and examining potential areas of tourism development, this research aimed to increase understanding of the demand for eco-cultural tourism.

The findings presented above make a sizable contribution to broad understanding of the characteristics and behaviour of those visiting Lake Waikaremoana. The findings particularly provide insights into visitors' motivations and preferences, which together influence demand for products and services. While this study focussed only on the Lake Waikaremoana area, it is expected that those in other destinations will see similarities with their own areas, will find elements of the analysis useful, and may be able to use this report as a background to future studies.

6. Acknowledgements

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Appendix 1 – Questionnaire

Lake Waikaremoana Visitor Survey

Interviewer: _____

Date: _____

Location: _____

ID Number: _____

<input type="radio"/> Male
<input type="radio"/> Female

Good morning / afternoon / evening.

Do you live in the Lake Waikaremoana area?

(See reference map)

No

If yes, thank respondent for their time if no, continue.

Explain survey including:

✍ Your name.

✍ This is part of a study run by Landcare Research (a Crown Research Institute).

✍ This survey is aimed at understanding what people do with their time while in the Lake Waikaremoana area and how that might change if different facilities and activities were available.

✍ This is part of a larger study which is looking at some of the cultural aspects of tourism in New Zealand.

✍ The survey will take about 10 minutes.

Thank you very much for your help, your participation is very important to the success of the research.

About your trip

1. Where do you live normally? _____ (country or NZ region)

2. Are you Maori? Yes No

3. How old are you? _____

4. How many people are travelling with you on this visit? _____

5. How old are the people travelling with you?

Age

Age

6. For how many nights will you be away from home in total on this trip? _____

If respondent is from overseas...

a. How many nights will you spend in NZ on this trip? _____

7. How many nights will you spend (including nights already spent) in the Lake Waikaremoana area during this trip?

8. Will you be staying in the same accommodation for all the nights you will be in the area?

Yes No

9. What kind(s) of accommodation will you be staying in? (interviewer to complete table below).
10. How many nights will you be spending in each kind of accommodation you have told me about? (interviewer to complete table below).
11. How many of these nights of accommodation did you book before you arrived in the Lake Waikaremoana area? (interviewer to complete table below)

Type of Accommodation	No. of nights	Where (MC, Mokau, etc.)	Type of accom. (tent, hut etc.)	No of nights pre-booked	When pre-booked
Private home / Visiting friends or relatives (VFR)					
Hotel					
Motel / Motor Inn					
B&B					
Backpacker / Youth Hostel					
Commercial camp ground / holiday park (tent, cabin, campervan)					
National Park DOC hut or tent site					
Free camping (tent, cabin, campervan etc)					
Homestay / Farmstay					
Marae					
Holiday Home or Timeshare					
Serviced Apartment					
Exclusive / Luxury Lodge					
Other					

12. Here is a list of types of accommodation. Not all of these are currently available in this area. If you were coming here again and all of these types were available are there any which you would not consider staying in?

Type of Accommodation	Would not	Top 3
Private home / Visiting friends or relatives (VFR)		
Hotel		
Motel / Motor Inn		
B&B		
Backpacker / Youth Hostel		
Commercial camp ground / holiday park (tent, cabin, campervan)		
Hunting / fishing / tramping lodge		
National Park DOC hut or tent site		
Free camping (tent, campervan etc)		
Homestay / Farmstay		
Marae		
Holiday Home or Timeshare		
Serviced Apartment		
Exclusive / Luxury Lodge		
Maori lodge		
Other		

13. If you were coming here again and all of these types of accommodation were available which 3 types of accommodation would you be most likely to stay in?

14. What mode of transport did you use to get to the Lake Waikaremoana area?
(Tick box in table below)

15. Will you use the same mode of transport to leave the Lake Waikaremoana area?
(Tick box in table below)

	To this area	Away from this area
Private car		
Campervan (note whether rented or private)		
Rental car		
Tour coach		
Scheduled or shuttle bus		
Backpacker bus		
Other (please specify)		

16. Where did you spend the night before your arrival in the Lake Waikaremoana area?

17. Where will you spend the next night after you leave the Lake Waikaremoana area?

18. Which road did you use to get in to this area?

Road from South East (Wairoa) Road from North West (Murupara)

19. Which road will you use to leave this area?

Road to South East (Wairoa) Road to North West (Murupara)

20. Activities:

a. Which of the following activities will you be doing in the Lake Waikaremoana area during this visit?

(Please tick activities in table below)

b. Did you book any of those activities before you arrived in the area?

(Please tick activities in table below)

c. If yes to booking, for how much time (in either hours or days) did you book each activity?

(Please enter amount of time in hours or days in table below)

Activity	Doing	Pre-booked when	Length of activity
Great walk (all or part)			
Other overnight tramp			
Day or short tramp or bush walk			
Fishing			
Hunting			
Swimming			
Kayaking / rowboating			
Waterskiing			
Motorboating			
Horse riding or trekking			
Marae visit			
Visiting friends or relatives			
Scenic drive			
Relaxing / doing nothing			
Other			

21. What was your main reason for choosing to visit the Lake Waikaremoana area?
(If respondent mentions a particular activity probe why they have chosen to do that activity here, i.e. why kayaking here, or why this great walk instead of one of the others).

22. What information sources (if any) did you use when planning the Lake Waikaremoana part of your trip?

Information source	
Guide book	
Brochure	
Information centre	
Travel agent	
Internet	
Newspaper or magazine article	
Newspaper or magazine advert	
Telephone directory	
Recommendation from friends or family	
Recommendation from accommodation provider	
Other personal recommendation	
Other	

- 23.

a. Is this your first time in the Lake Waikaremoana area?

If no...

b. Not counting this trip, how many times have you been to the Lake Waikaremoana area? _____

24. How likely do you think you are to come back to the Lake Waikaremoana area in the future?

- Definitely
- Probably
- Really don't know
- Probably not
- Definitely not

25. Why do you think you would definitely/probably/not come back? (or) What factors would that depend on?

26. Are there any facilities or activities that are not currently available in the Lake Waikaremoana area but which you would like to see here in future?

27. If all of the following activities were available are there any that you would not consider doing? (number options)

Activity	Would not consider	Top 3 choices
Guided tramp (overnight)		
Guided tramp (day only)		
Independent tramp (overnight)		
Independent tramp (day only)		
Guided fishing trip		
Independent fishing trip		
Guided hunting trip		
Independent hunting trip		
Guided motorboat trip		
Guided kayaking trip		
Independent kayaking trip		
Guided cruise (with fishing)		
Guided cruise (without fishing)		
Guided horse trekking		
Marae visit		
Conservation or nature talk		
Film about the area		

28. Looking at that same list again, which 3 activities would you be most likely to do?

If no guided options are selected move on to accommodation questions, else...

29. Considering activity 1 (interviewer to ask question about one guided activity chosen as being in the top three)...

a. If all were equally well informed, would you prefer to have a New Zealander or a foreigner as a guide or do you have no preference?

If New Zealander...

b. You chose to have a New Zealander as a guide. Again, if they were equally well informed, would you prefer to have someone from the local area, someone from elsewhere in New Zealand or do you have no preference?

(Repeat previous 2 questions for all guided options selected in top three).

Activity (write in top 3 from above table)	New Zealander		Foreigner	No preference
	Local			
	Elsewhere			
	No pref.			
	Local			
	Elsewhere			
	No pref.			
	Local			
	Elsewhere			
	No pref.			

30. If you knew that a guided activity contained any Maori content would you prefer to have a Maori guide, would you prefer to have a non-Maori guide with a good knowledge of the Maori content or do you have no preference?

Maori Non-Maori No preference

While we're here as well as doing this survey we're doing some more in-depth interviews about how people from different cultures react to cultural content in visitor attractions—I wonder if you'd be willing to talk to me for about half an hour later over a coffee?

Thank you for your time and help, I hope you have an enjoyable holiday and a safe trip home.

Appendix 2 – Map of survey area





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