

**BEFORE THE QUEENSTOWN LAKES DISTRICT COUNCIL PROPOSED
DISTRICT PLAN HEARINGS PANEL**

UNDER the Resource Management Act 1991

**IN THE MATTER OF the Proposed Queenstown Lakes District
Plan [Part One]**

STATEMENT OF EVIDENCE OF FIONA BLACK

FOR

Real Journeys Limited (621/1341)

and

Te Anau Developments Limited (607/1342)

Dated: 22 March 2016

1. INTRODUCTION

- 1.1 My full name is Katherine FIONA Black. I work for Real Journeys Limited managing Real Journeys and its subsidiary companies Department of Conservation Concessions; Resource Consents and other regulatory authorisations along with other operational related duties.
- 1.2 I am a qualified commercial launch master; coach driver and have a Bachelor of Home Science Degree (University of Otago); Postgraduate Diploma in Business and Administration and have completed a Postgraduate Environmental Planning and Law paper from Massey University.
- 1.3 I have worked in the New Zealand Tourism industry for 28 years; initially as one of the operators of “Monarch” Wildlife Cruises, in Dunedin; which involved a wide variety of roles from deckhand to Marketing Manager and Operations Manager.
- 1.4 For the last 12 years I have worked for Real Journeys; in the first instance as the Milford Sound Branch Manager and for the last nine years in my current role. Through these various roles I have gained a considerable knowledge of the tourism industry, including the evolving challenges faced by this industry.
- 1.5 Since 2011 I have been a member of the Southland Conservation Board, which is a statutory body appointed by the Minister of Conservation and established under the Conservation Act. This involves me in many regionally and nationally important conservation issues mainly relating to the management of the conservation estate; including Freshwater Management; Freedom Camping; Pest Species Management; tourism infrastructure and visitor management especially in the context of maintaining the natural and remote values of conservation areas.

2. BACKGROUND

- 2.1 Real Journeys Limited has been operating for over 60 years. In the 1954 Les and Olive Hutchins began operating the Manapouri-Doubtful Sound Tourist Company, running excursions from Manapouri to Doubtful Sound and return. In 1966 Les and Olive acquired Fiordland Travel Ltd., with its Te Anau Glow-worm Caves and Milford Track Lake Transport operation and began trading as Fiordland Travel Limited. Ongoing expansion followed with the purchase of the vintage steamship “TSS Earnslaw” in Queenstown in 1969 and with the establishment of cruises in Milford Sound in 1970.

- 2.2 Since 2002, Fiordland Travel Ltd has operated all its tourism excursions under the 'Real Journeys' brand and in 2006 changed its company name to Real Journeys Limited. Te Anau Developments Limited is a wholly owned subsidiary of Real Journeys and is the land owner of some of the properties managed by Real Journeys, including Walter Peak.
- 2.3 While remaining a "family" business, the company continues to expand with the purchase of Cardrona Alpine Resort; 155 hectares of land at Walter Peak in 2013; and the International Antarctic Centre in Christchurch in 2015.
- 2.4 Real Journeys and its subsidiaries now have operational bases in Christchurch, Milford Sound, Te Anau, Manapouri, Queenstown, Wanaka, Bluff and Stewart Island. The company offers a range of quality tourism excursions including: multiday discovery expeditions around the southern fiords and Stewart Island; day time and overnight cruises on Milford and Doubtful Sounds (with daily coach connections from Te Anau and Queenstown); Te Anau Glow-worm Caves excursions; guided Milford Track day walks; Stewart Island Ferries, tours and accommodation on Stewart Island; in Queenstown, cruises on Lake Wakitipu aboard the "TSS Earnslaw" combined with Walter Peak High Country excursions and dining options at Colonel's Walter Peak Homestead; accommodation, skiing and mountain biking at Cardrona; and tours and excursions at the International Antarctic Centre.
- 2.5 Real Journeys' is the largest tourism operator in the region and has a well earned reputation for providing high quality excursions, enjoyed by visitors from New Zealand and around the world. Real Journeys is one of the most successful and highly respected Tourism Companies in New Zealand.
- 2.6 Although Real Journeys long-established base of operations has been Fiordland, the company has a 46 year connection with the Queenstown District and these connections have increased over the years as the company has grown and our products have diversified.
- 2.7 This is reflected in our current employment figures; with 32% of Real Journeys' employees including the company CE and CFO being Queenstown based, and if I add in Cardrona Alpine Resort employees, this percentage increases to 53% in summer months; rising to approximately 75% in winter months.
- 2.8 To the year ended September 2015, Real Journeys carried 203,847 passengers on the "TSS Earnslaw" (up 20% from 2014) and 60,816

passengers on our coaches ex Queenstown (up 20% from 2014). This equates to 34% of Real Journeys' passengers for the year ended September 2015 and this percentage is up from 32% in 2014.

- 2.9 Real Journeys' has considerable land and infrastructure investments in the District and wants to see the District managed to protect the values and assets which make the area a desirable place to live and visit.
- 2.10 Real Journeys does not believe this is happening at present and this has led to significant issues in Queenstown which are having adverse effects on the area. For instance the Wilding Pines have been poorly managed changing many of the District's landscapes to something resembling North America, contributing to the degradation of the District's landscape values.
- 2.11 Further, the traffic congestion experienced when travelling into Queenstown Town Centre via vehicle often creates a very frustrating and tortuous experience for residents and visitors who are unfamiliar with the town.
- 2.12 If these matters and many others like it are not addressed, the desirability of Queenstown as a tourism destination will be forever compromised, killing the golden goose that the District relies on for its economic wellbeing.
- 2.13 Visitor arrivals to New Zealand numbered 3.17 million in the year to January 2016, the highest-ever annual total. This was 11 percent higher than in the January 2015 year (up 305,600). Australia (1.33 million), China (371,100) and United States (247,500) were again New Zealand's biggest visitor sources, contributing 61 percent of all arrivals in the January 2016 year. These three countries also provided the biggest increases compared with the 2015 year, with arrivals from China up 110,700, Australia up 72,500, and the United States up 26,000. <http://www.mbie.govt.nz/info-services/sectors-industries/tourism/tourism-research-data/international-travel/international-visitor-arrivals-commentary>
- 2.14 Total arrivals have been most significantly boosted by growth out of China, with total arrivals up 42.5 percent for the year ended January 2016. Of more significance than volume, is the average expenditure per Chinese visitor was \$5,100 (Sept International Visitor Survey); a 30 percent increase for the year. Put into context, the China market is now on a par with our more mature markets of the UK and US average expenditure per arrival at \$5,400 and \$4,800 respectively. <http://www.tourismnewzealand.com/markets-stats/markets/china/>

- 2.15 In addition, the face of Chinese travel has changed significantly; with the China market maturing more quickly than any other market. As recently as two years ago, the Chinese market was much more heavily skewed towards guided tours (53 percent) with just 17 percent in the Free and Independent Traveller (“FIT”) segment. The market has progressed quickly to more independent style travel with FITs now comprising 31 percent of the market.
- 2.16 Independent travellers are having a significant impact on the total value of Chinese visitors. By the end of 2014, Chinese visitor expenditure had broken \$1 billion, and per person expenditure was second only to the long-staying Germans. Also independent travellers travel into the regions, stay for longer; Chinese holiday visitors now stay an average of 8.3 days compared with 6.2 days in 2010.
- 2.17 In February 2015, over Chinese New Year, there were more Chinese holiday visitors than from any other country, surpassing the number of visiting Australians, and equalling the total for Americans, Canadians and British combined. Of the 215,040 Chinese holiday visitors in the year ending February 2015, some 73,000 were FIT (up 60 percent on the previous year) while 144,000 were group (up 8 percent) <http://www.tourismnewzealand.com/news/chinese-new-year-brings-growth-and-change/>
- 2.18 Queenstown’s Tourism Industry, is a significant contributor to New Zealand’s visitor economy. In the year ended June 2014, the District captured over 10 percent of all of New Zealand’s commercial accommodation guest nights (compared to the 0.7 percent it represents of the national population). Visitor expenditure in Queenstown Lakes was estimated to be over \$1.5 billion in 2013, around 8.5 percent of nationwide visitor expenditure, and the second highest level of expenditure in any territorial authority region. Growth in nominal visitor expenditure over 2009-2013 in the District has been higher than growth in most other districts in New Zealand, and the Queenstown area experienced the fastest growth in visitor expenditure over the period out of all regions at 7.6 percent per annum.
- 2.19 The majority of visitors to Queenstown Lakes are international (65 percent compared to the New Zealand average of 36 percent in 2013). Growth in international visitor nights has exceeded other areas of New Zealand. Similarly, the District achieved the highest growth in international visitor expenditure over 2009-2013 out of all territorial authorities (7.7 percent per annum compared to 1.3 percent nationally). <http://www.qldc.govt.nz/assets/Uploads/Your->

- 2.20 Over the last 20 years, New Zealand has experienced a visitor arrivals growth rate of 4.0% per annum despite the following global shocks: http://www.stats.govt.nz/browse_for_stats/population/Migration/iva.aspx
- 1997 Asian Financial Crisis;
 - 2001 9-11 terrorist attacks;
 - 2002 - 2003 SARS outbreak;
 - 2008 - onwards – Global Economic Crisis; and
 - 2011 Christchurch and Japan Earthquakes.

The Ministry of Business, Innovation & Employment (MBIE) is forecasting an annual visitor arrival growth rate of 4.0% p.a. from 2015 to 2021. http://www.mbie.govt.nz/info-services/sectors-industries/tourism/tourism-research-data/international-tourism-forecasts/documents-image-library/tourism_forecasts_2015-2021.pdf Accordingly, going on past performance Real Journeys believes the District can expect to receive more than 4.0% p.a. growth in visitor numbers and as emerging markets such as China and India transition to FIT; a larger proportion of these visitors will be travelling independently in rental vehicles.

- 2.21 Consequently Real Journeys contends that QLDC should be planning for this anticipated tourism growth. However this is not reflected in the PDP.

3 GENERAL COMMENTS ON PDP

- 3.1 For simplicity sake I will only refer to Real Journeys Limited, not Te Anau Developments Limited. Nevertheless some of the points made are relevant to either or both entities.
- 3.2 As a company we are disappointed with the timeframes set for this Proposed District Plan (PDP) process. The summer season is a very busy time of year for most tourism operators, and generally we do not have the time or the resources to dedicate to reviewing such significant planning documents. For this reason, Real Journeys contracted John Edmonds and Associates Limited to submit on the PDP on our behalf. Nevertheless because John Edmonds and Associates are not tourism operators and do not know the intricacies of our business, these submissions still required considerable input from Real Journeys to ensure all the our concerns were addressed in

these submissions.

- 3.3 The tight timeframes, especially for making further submissions and reviewing the section 42A reports were far from helpful. Taking on the work of reviewing the PDP documents with such short lead times has resulted in postponement of other scheduled Real Journeys work, and has resulted in delays in lodging resource consent applications for works that are critical to our operation. In addition, some of these resource consent applications have had to be contracted out rather than being prepared by myself, resulting in additional unforeseen costs for Real Journeys.
- 3.4 I believe these PDP timeframes has resulted in the very limited number of tourism operators or tourism related businesses submitting on the PDP; which will not be beneficial in the long run, in a District which relies so heavily on tourism for its economic wellbeing.
- 3.5 We are also disappointed in the effort QLDC has invested in recognising and providing for tourism in the PDP, and how few changes to the PDP have been recommended by staff as a result of the submission process. It does not feel like our submissions were afforded due consideration. For example the Section 42A reports are silent on our suggestion to create a water chapter. Also, we repeatedly asked QLDC staff to discuss our concerns with the PDP, but staff have been “too busy” to meet.

4 STRATEGIC DIRECTION

4.1 *Policy 3.2.1.1.3*

Promote growth in the visitor industry and encourage investment in lifting the scope and quality of attractions, facilities and services within the Queenstown and Wanaka ~~central business areas~~ town centres.

The implication that the quality of tourism product needs to be improved is offensive and we do not believe the PDP is the appropriate mechanism for addressing the quality of tourism attractions in the District.

- 4.2 We appreciate that the QLDC wishes to ensure the town centres in the District remain vibrant. Nevertheless we believe it is impractical for PDP to focus on consolidating the visitor industry in the town centres, even by default; with the current traffic congestion especially on State Highway 6 between central Queenstown and Frankton. Yes it is appropriate for visitor services such as retail,

banks, restaurants and booking centres to be located in town centres, but not the bulk of visitor attractions.

- 4.3 It is New Zealand's landscapes which attract the vast majority of international visitors to the region and the attraction for visitors is to get out into the countryside and experience these landscapes first hand in some form. Accordingly it is not a practical strategy to effectively advocate for the growth in the tourism sector to be focused in town centres.
- 4.4 This is particularly critical with respect to the provision of more commercial visitor accommodation. Much of the visitor accommodation, which needs to be developed to provide for the anticipated visitor demand, cannot be practically located in town centres. This is because there is an insufficient supply of large sites that can be readily developed for commercial accommodation.
- 4.5 It seems to me because the PDP has such a paucity of objectives, and policies relating to tourism; tourism has been gathered up with the objectives and policies which relate to town centres even though there are tourism related business activities right across the District, which contribute to the economy.
- 4.6 The QLDC planners and Section 42A report writers acknowledge the importance of the Tourism Industry to the District's economy and, as stated above, Real Journeys contends that this tourism industry will continue to grow and will remain central to the District's economy. Yet we do not believe the Tourism Industry has been bestowed appropriate status in the PDP, even with the recommended revisions. Not only with respect to providing for tourism activities, but also including provisions that will cater for the required tourism industry infrastructure including transport and visitor accommodation; especially in light of the predicted tourism growth.
- 4.7 An efficient transport network connecting the District's towns to the rest of the country is essential to the ongoing success of the tourism industry and the economic viability of the District. The QLDC Economic Development Strategy identifies that parts of the District's roading network are vulnerable and subject to congestion. <http://www.qldc.govt.nz/assets/Uploads/CouncilDocuments/Strategies-and-Publications/Queenstown-Lakes-Economic-Development-Strategy-Consultation-Document.pdf>

4.8 The inability for the Queenstown roading network to function efficiently is particularly critical with the ongoing growth in the FIT market. Barry Kidd, Chief Executive of the Rental Vehicle Association New Zealand, advised in early February 2016 that the rental car industry thought peak season NZ wide hires would hit 100,000 a month, but now estimated they would reach at least 120,000 for both January and February 2016. *"It could be as high as 145,000, and 80 per cent of them would be overseas drivers. We're operating at pretty near full capacity."* Further, the General Manager of GO Rentals, James Dalglish, stated his company had added more than 700 new vehicles to its fleet to cope with demand. *"We've got some periods of time we're verging on sold out on all our car classes."* As well as the overall increase in tourist numbers, the average vehicle rental period had risen to over seven days. <http://www.stuff.co.nz/business/76487065/Rental-car-companies-scramble-to-meet-demand-from-overseas-visitors>

4.9 The traffic congestion in Queenstown, especially in the Town Centre, results in significant costs for our business. Such as; for our day trips to Milford Sound and Doubtful Sound ex Queenstown, Real Journeys can no longer pick up or drop off its passengers from Queenstown visitor accommodation with our coaches and we engage Taxis to undertake this service at a cost of approximately \$75,000 per annum. This is a significant cost which is increasing annually.

4.10 The Queenstown traffic congestion issue was also identified in the January 2015 issue of the online magazine Architecture Now. <http://architecturenow.co.nz/articles/queenstown-on-the-move/>

"However, parallel infrastructure has yet to develop. One arterial route connects Queenstown to Arrowtown, with Frankton in the middle. Along with the existing Lake Hayes Estate, 590 lots at Shotover Country are underway, and 147 proposed lots at Bridesdale. Add to this the Five Mile shopping development, Queenstown Central and Shotover Park Limited. Once Shotover Country and Bridesdale are completed, 737 new houses will exist. If each house has two cars, there could be 1,474 cars commuting on Queenstown's one and only main road.

Council has stated that infrastructure is generally provided on a just-in-time basis. There is a maxim that building new roads to relieve traffic congestion is like 'fighting obesity by letting out one's belt' – widening roads seems to increase the demand for road space. Instead, emphasis needs to be on innovation –

more effort and thought into public transport and links.”

- 4.11 Accordingly, Real Journeys as an operator of on average 8 to 9 Queenstown based coaches per day carrying in excess of 60,000 passengers annually, contends the PDP Strategic Direction chapter specifically, needs to include provisions to address the shortcomings of the District's transport system to ensure the District's main industry, tourism is not hampered and saddled with additional costs; including policies around using the waterways for public transport to reduce road congestion.
- 4.12 In addition, at present the PDP Strategic Direction Chapter only addresses housing supply and ignores the need to provide for additional visitor accommodation including holiday parks for campervans. For instance: Colliers International states that the number of hotel rooms in Queenstown has remained static since 2012, with 25 hotels and circa 3200 rooms. However occupancy has increased significantly from 63% in 2012 to 77% for the year ended September 2015. Average room rates achieved, grew from \$143 in 2012 to \$160 in 2015, the highest rate out of the five major markets. These record growth rates and average daily room rates mean that Queenstown became the best performing hotel market in the country at the Y.E. September 2015, with revenue per available room increasing from \$90 in 2012 to \$123 in 2015. www.colliers.co.nz/find%20research/hotels/
- 4.13 During February 2016, especially during Chinese New Year, Queenstown accommodation was totally booked out and groups travelling to Milford Sound for day trips had to be accommodated in Dunedin, Invercargill, Twizel, Omarama, and even at Cardrona Alpine Resort. Also because of the lack of available accommodation much of Real Journeys business from traditional markets (Aus., UK, USA, and Germany) was displaced into March. However it is impossible to gauge how much business was lost over this busy summer season due to the lack of beds in the Queenstown region.
- 4.14 Therefore to cope with this growing tourism market more commercial accommodation needs to be developed in Queenstown. Nevertheless, there is currently a lack of available land and services to accommodate the growing FIT segment yet the PDP appears completely silent on this particular issue.
- 4.15 Real Journeys maintains that the strategic direction chapter should include goals and objectives with respect to the entire relevant

infrastructure which is required to support this growing Tourism Industry. In some locations in the District, such as Walter Peak and the Cardrona Alpine Resort, vital tourism infrastructure includes provision of roading; drinking water; wastewater treatment facilities; power generation and telecommunication facilities. In addition, water based transport activities rely on privately owned wharves, jetties and slipway infrastructure.

- 4.16 That is; the PDP does not acknowledge that in some locations the provision of private small scale service infrastructure is critical to the operation of many enterprises. Also, while the s42A Report recommends that the PDP recognises regionally significant infrastructure, it is not clear if this will apply to tourism infrastructure.
- 4.17 Real Journeys believes the PDP focuses largely on the terrestrial environment of the District and does not place enough emphasis on the significance of the District's waterways; not only for their worthy natural character but their value as an important resource in the District.
- 4.18 Such a water chapter should also recognise the importance of water transport in the District including providing for and protecting the operation of the "TSS Earnslaw"; along with the vessel's essential infrastructure such as wharves, jetties and the Kelvin Peninsula slipway.
- 4.19 Accordingly we are advocating for the PDP to give the Districts waterways their appropriate status by including a separate water chapter in the PDP; and this should in turn be reflected in the Strategic Direction chapter.
- 4.20 From reading some of the QLDC PDP reports it is obvious to me that the QLDC staff have not identified all the issues creating problems in the District's housing sector; consequently how can the Council develop appropriate plan provisions to address this issue? For instance; homeowners who have traditionally taken in flatmates or boarders to subsidise their mortgage, can now rent out a room for a couple of nights a week with Airbnb and attract the same rent as a flatmate would pay per week. However with Airbnb, homeowners do not have the inconvenience of having fulltime flatmates and only accept Airbnb bookings when it suits. This is contributing to the lack of suitable worker accommodation in the District; which is in turn

contributing to high staff turnover which inflates business running costs and making the area a much less desirable destination for the seasonal workers on working holiday visas; that the resort relies upon for labour. https://www.airbnb.co.nz/s/Queenstown--New-Zealand?s_tag=QspmWO60

5. LANDSCAPES

5.1 The main emphasis of the PDP Landscapes Chapter is terrestrial landscapes not the District's waterways, further accentuating our contention that the plan provisions relating to waterways need to be allocated into a separate chapter, separate from their proposed rural zoning.

5.2 Policy 6.3.1.8 (6.3.1.7 in revised Landscape Chapter)

Ensure that the location and direction of ~~lights does not cause glare to other properties, roads, and public places or~~ avoids degradation of the night sky, landscape character and sense of remoteness where it is an important part of that character.

This amendment to this policy totally changes the meaning of this policy and ignores the point Real Journeys is trying to make. Refer photos below. Extreme light spill (such as illustrated below) makes it very difficult to navigate a vessel on Lake Wakatipu in the dark. Navigation at night requires good night vision to pick out navigation marker lights and the navigation lights on other vessels. Hence the waterways of the District need to be protected from undue glare to ensure vessel navigation is not further compromised.





- 5.3 Nevertheless Real Journeys does support any policy which protects the natural dark of the night sky for its intrinsic value.
- 5.4 In this chapter there is a significant importance placed on maintaining the rural character of the District's landscapes. Real Journeys believes this is a flawed concept because the QLDC is effectively advocating for the maintenance of an extremely modified environment rather than supporting the preservation of the natural character of waterways and protection of outstanding natural landscapes in accordance with s6a and 6b of the RMA.
- 5.5 As a result, Real Journeys contends that farming is afforded a disproportionate status in the PDP based on invalid assumptions. For example the following statement in the PDP regarding the open character of farmland is erroneous:
- "The open character of productive farmland is a key element of the landscape character which can be vulnerable to degradation from subdivision, development and non-farming activities. The prevalence of large farms and landholdings contributes to the open space and rural working character of the landscape. The predominance of open space over housing and related domestic elements is a strong determinant of the character of the District's rural landscapes."*
- 5.6 The "productive" farmland in the District is not open in character. The farmland in dairying, horticulture and viticulture is the most productive farmland in the District and is not open in character compared to the District's high country stations. High country stations have relatively low stocking ratios and have a much lower productivity compared to lowland farms.

"High country is characterised by hilly terrain and low pasture production, especially during the cold winter months, and is

used predominantly for sheep farming based on fine wool production. Flat to rolling country usually has good all-year-round pasture production and supports almost all of New Zealand's dairy cattle in addition to large numbers of sheep and beef cattle."

TABLE 1 Area, pasture production and number of livestock carried on the three grassland regions (from Hodgson et al. 2005)

Region	Area (millions of hectares)	Pasture production (tonnes DM ¹ per hectare)	Livestock (millions)			Stock units ² per hectare
			Sheep	Beef	Dairy	
High country	4.5	2.0	2.5	0.1	-	0.7
Hill country	5.0	7.0	20.3	1.9	0.2	7.5
Flat to rolling	4.5	11.0	26.7	2.9	3.4	14.0

¹DM = dry matter.

²Since most farmers have both sheep and cattle, the stock unit (su) is the common unit used to express stocking rate where 1 su = one breeding ewe, consuming 550 kg DM per year.

https://www.landcareresearch.co.nz/_data/assets/pdf_file/0020/7033/1_5_Morris.pdf

- 5.7 In addition, in the 2013 Otago Economic Overview Berl found that:
"The Primary production sector is a relatively small part of the Queenstown Lakes, accounting for a little more than 3 percent of the district's employment and GDP."

Whereas the equivalent tourism related data shows that over 20% of the District's GDP is accounted for by Tourism.
<http://www.centralotagonz.com/PicsHotel/CentralOtagoRTO/Brochure/BERL%20Otago%20Economic%20Overview%202013.pdf>

Accordingly Real Journeys maintains farming should not be given greater precedence in the PDP, especially compared to the Tourism Industry as it is the Tourism Industry which sustained the region economically for the last few decades.

- 5.8 The provisions of policy 6.3.1.12 are relevant, for not only providing for regionally significant infrastructure but, as stated above, businesses such as Real Journeys need to locate infrastructure such as telecommunications equipment (for Health and Safety) on hill tops in ONFLs (Outstanding Natural Features and Landscapes) and these

requirements should not be restricted by such a narrow policy.

5.9 Policy 6.3.4.3

Have regard to adverse effects on landscape character, and visual amenity values as viewed from public places, with emphasis on views from formed roads.

Again the focus of the PDP seems to mainly be on the terrestrial environment. The adverse effects on landscape character are usually best seen from out on the District's lakes and rivers, therefore the above policy should also reflect this.

5.10 Real Journeys considers policies 6.3.5.3 and 6.3.5.4 to be unsound as they are based on maintaining the status quo of a currently modified environment.

"Before human arrival much of the high country was in forest..... When grazing ceases, tussock grasslands recover and succession back to dry forest begins. This recovery of vegetation helps sequester carbon, provides habitat, and improves water management."

<http://www.forestandbird.org.nz/files/file/HighCountry.pdf>

5.11 That is, the existing open landscapes and the established character of the District are the result of forest clearance and outdated farming practices such as burning to encourage new growth. Real Journeys considers that replanting of endemic species, even along the margins, should be encouraged not discouraged by such policies. Also what is really wrong with screening a development to reduce the adverse visual effects?

5.12 Regarding Policy 6.3.8.2

Recognise that commercial recreation and tourism related activities locating within the rural zones may be appropriate where these activities enhance the appreciation of landscapes, and on the basis they would protect, maintain or enhance landscape quality, character and visual amenity values.

Real Journeys contends the requirements for tourism related activities to "enhance the appreciation of landscapes" and "protect, maintain or enhance landscape quality, character and visual amenity values" is impractical, and many existing tourism attractions would not comply with this proposed policy such as Bungy Jumping or the Skyline Gondola.

5.13 It would be hard to argue that many bungy jumpers gain an enhanced appreciation of the landscape or that the Ledge Bungy and that the Skyline Gondola "protect, maintain or enhance landscape

quality, character and visual amenity values”. Consequently Real Journeys maintains that a more permissive policy is essential to ensure appropriate tourism development is enabled and not stifled.

- 5.14 In terms of rule 6.4.1.3 Real Journeys contends the Walter Peak Rural Visitor Zone should be included in this rule to provide for Real Journeys proposed developments.

6. CONCLUSION

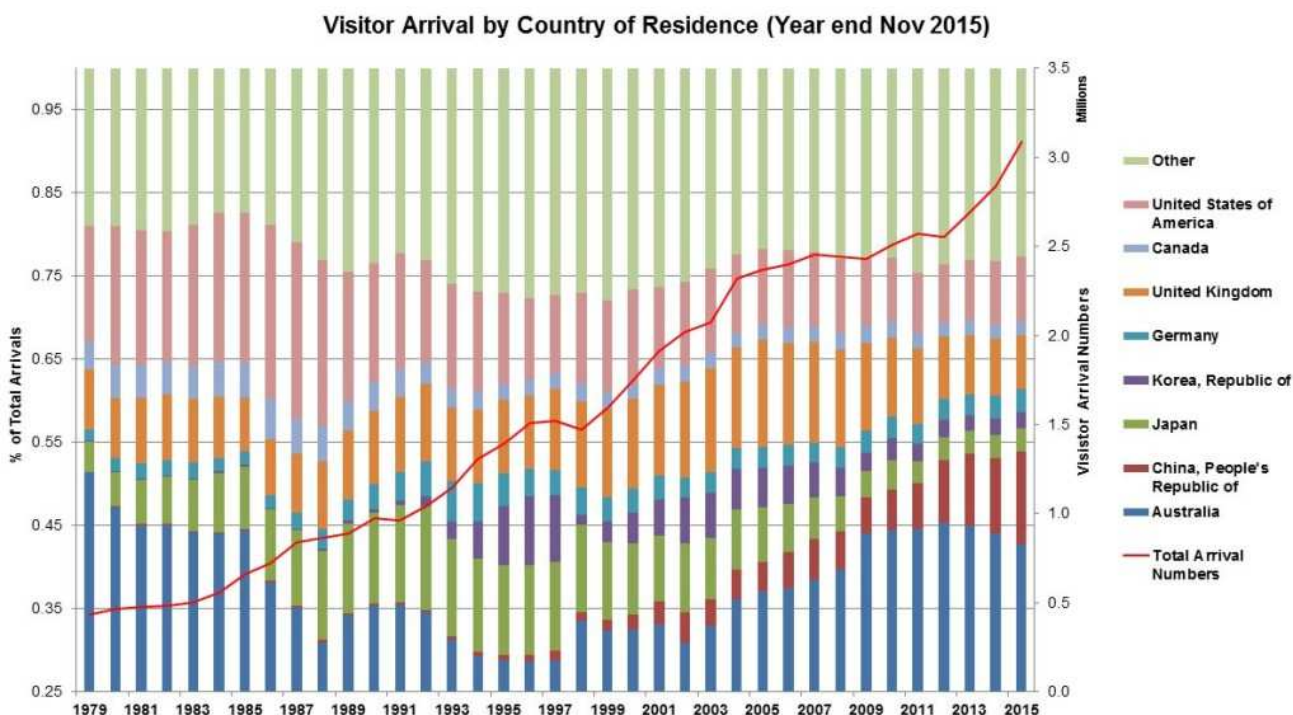
- 6.1 Real Journeys’ primary concern is to ensure that the PDP adequately provides for the growing Tourism Industry, including provision for the facilities, infrastructure and services which are required to support an efficient tourism industry. Such as: adequate commercial accommodation; an effective non congested transport network; wastewater treatment facilities; power generation facilities; telecommunication facilities; adequate and safe wharf, and slipway structures.
- 6.2 It is very disquieting that the PDP is quiet on the significant issue of providing for the anticipated Tourism Growth especially in terms of addressing the deficit in commercial visitor accommodation and providing solutions to the traffic congestion in and around Queenstown.
- 6.3 I believe some of this can be put down to relying on tourism data from pre 2012, when the Tourism Industry, like the rest of the economy, was in the grips of the GFC; such as the information referred to in the McDermott Miller Strategies in association with Allan Planning & Research November 2013 report. www.gldc.govt.nz/assets/.../2.-Appendix-A-McDermott-Miller.PDF However the Tourism Industry has been recovering since 2012 and experienced a record season in 2014-15, hence there was ample opportunity to attain revised estimates and update the PDP accordingly.
- 6.4 Real Journeys believes that it is only through a vibrant and sustainable Tourism Industry that we can reinvest and ensure the quality of our tourism offerings are maintained and in many cases enhanced. To this end we ask that the PDP be further revised to adequately enable Tourism Activities across the District.

Decoding the Chinese Tourism Boom: Part I

28 Jan, 2016

In the year ended November 2015, over three million international visitors arrived in New Zealand, up 8.9% over the same period last year. This was significantly ahead of the long term growth rate over the last 20 years of 4.0% p.a. as well as the Ministry of Business, Innovation & Employment's (MBIE) annual visitor arrival growth rate forecast of 4.0% p.a. from 2015 to 2021.

While growth was broad-based, with visitors from all major regions up year-on-year, of particular interest was the phenomenal 34% growth rate in Chinese visitors arriving in 2015. Over the last 20 years, Chinese visitors have grown at a staggering 18% p.a., from barely over 12,000 visitors in 1996, to over 340,000 in 2015. In contrast with Japan, once our largest Asian visitor arrival source, visitor arrivals from Japan have halved over the last 20 years, from over 160,000 in 1996 to the current the current 86,000 for the year ended November 2015. ^[1]



Source: <http://www.stats.govt.nz/iva> data series

Chinese visitors are big spenders when travelling to New Zealand. MBIE's international visitor expenditure survey shows that in aggregate, Chinese visitors spent on average over \$5,000 per trip and over \$400 per night for the year ended September 2015. This compares favourably with the total inbound visitor average spend of \$3,400 and \$188 respectively. The implications suggest that while Chinese visitors currently only make up 11% of the total visitor arrivals, they have a disproportionate impact on our tourism industry and wider economy.

Given the relatively high spending power of Chinese visitors, combined with fast visitor arrival growth rates, China is expected to overtake Australia as our biggest international spender in the next five years. It is therefore useful to understand the underlying drivers of the recent Chinese tourism boom.

While travel costs, safety and scenic views are often cited as the most important factors Chinese visitors consider when choosing travel destinations, there were two events in 2014 that provided a catalyst for the phenomenal Chinese visitor growth rate.

Firstly, in September 2014 the extremely popular Chinese reality TV show “*Dad, Where are we going?*” featured 217 minutes of New Zealand destinations. The show was watched by approximately 400 million viewers and according to Tourism New Zealand “the value of the coverage achieved from this activity is estimated at NZD \$169 million”.

Secondly, President Xi Jinping visited New Zealand in November 2014, the first by a Chinese head of state since President Hu’s visit in 2003. Both events resulted in a significant spike in online searches for keywords such as “New Zealand”, “New Zealand tourism” and “New Zealand visa” as eager Chinese citizens rushed online to learn more about New Zealand. Many academic studies find that online search trends can be a leading indicator for actual visitor arrival statistics.

Will we continue to see a 30%+ growth in the arrival of Chinese visitors in 2016?

If history is any indication, this trend may be difficult to continue. During President Hu’s visit to New Zealand in September 2003, a 28% increase in the arrival of Chinese visitors was observed for the year ended December 2004. However in the year ended 2005, only a 4% increase was observed. Nevertheless, the positive awareness impact that both events have created, coupled with the low New Zealand dollar, safe environment and beautiful scenery, will continue to make the land of the long white cloud an attractive destination for Chinese visitors for many years to come.

Shing Zhu

Analyst

[1] <http://www.stats.govt.nz/iva> data series

<https://milfordasset.com/decoding-the-chinese-tourism-boom-part-i/>

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Commercial Accommodation Monitor:

January 2016

Queenstown

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Preface

Commercial Accommodation Monitor: January 2016 – Queenstown presents comprehensive and impartial information on short-term commercial accommodation for the Queenstown Regional Tourism Organisation (RTO) area, from the Accommodation Survey. This survey is run by Statistics New Zealand on behalf of the Ministry of Business, Innovation & Employment.

The data relates to the areas covered by the following local authority:

- part of the Queenstown-Lakes District

Comparisons of monthly data with the same month of the previous year need to be treated with caution, as data for one period may be influenced by events for which there is no equivalent in the previous period (eg Chinese New Year, Easter).

For further data and commentary, see the monthly Accommodation Survey Hot Off the Press, and the monthly pivot tables – with variables by RTO and local authority area – both available on the Statistics NZ website (www.stats.govt.nz).

The February 2016 monitor will be released on 12 April 2016.

Liz MacPherson
Government Statistician

Standards and further information

Percentage changes

Percentage movements are, in a number of cases, calculated using data of greater precision than that published. This could result in slight variations.

Rounding procedures

On occasion, figures are rounded to the nearest thousand or some other convenient unit. This may result in a total disagreeing slightly with the total of the individual items as shown in tables. Where figures are rounded the unit is in general expressed in words below the table headings, but where space does not allow this the unit may be shown as (000) for thousands, etc.

Source

All data is compiled by Statistics New Zealand, except where otherwise stated. Both administrative and survey data has been used in this report.

Liability

While all care and diligence has been used in processing, analysing and extracting data and information in this report, Statistics NZ gives no warranty it is error free and will not be liable for any loss or damage suffered as a result of the use, directly or indirectly, of information in this report.

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1 Highlights

Monthly highlights

In January 2016 compared with January 2015:

- Guest nights rose 11.5 percent to 369,008
- International guest nights rose 14.9 percent to 254,679
- Domestic guest nights rose 4.6 percent to 114,329
- The average length of stay fell from 2.52 nights to 2.45 nights
- The overall occupancy rate rose from 76.3 percent to 83.9 percent
- The occupancy rate, excluding holiday parks, was 88.7 percent in January 2016
- Accommodation capacity, excluding holiday parks, fell 3.0 percent.

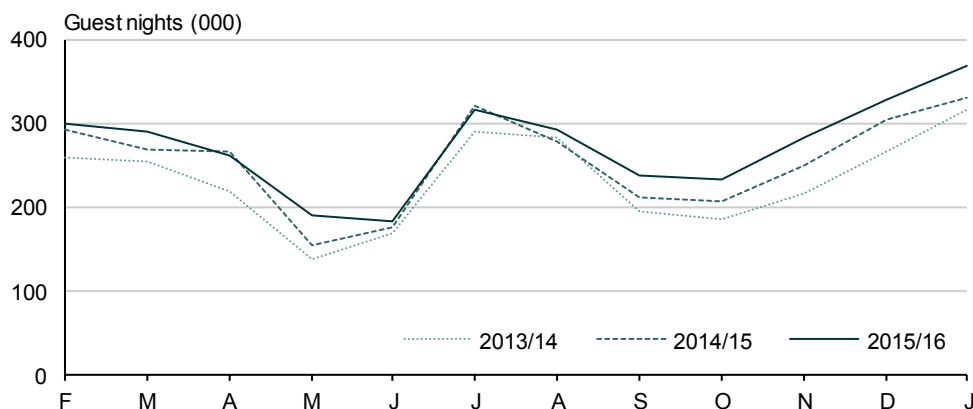
Response rates for January 2016

The response rate for the Queenstown RTO area was 75 percent for January 2016. (However, backpacker accommodation had a much lower response rate, which may affect the reliability of their data.)

The proportion of the origin-of-guest estimate from unadjusted data was 84 percent.

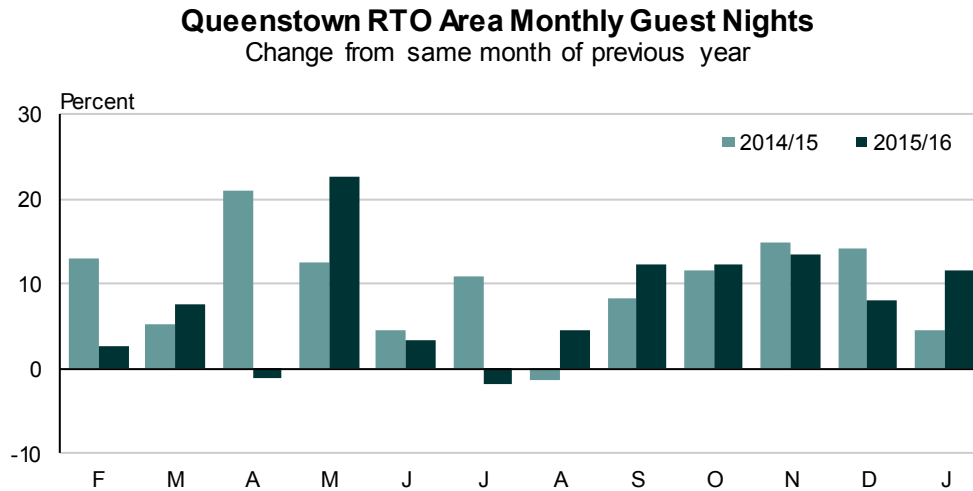
Figure 1.1

Queenstown RTO Area Monthly Guest Nights



Source: Statistics New Zealand

Figure 1.2



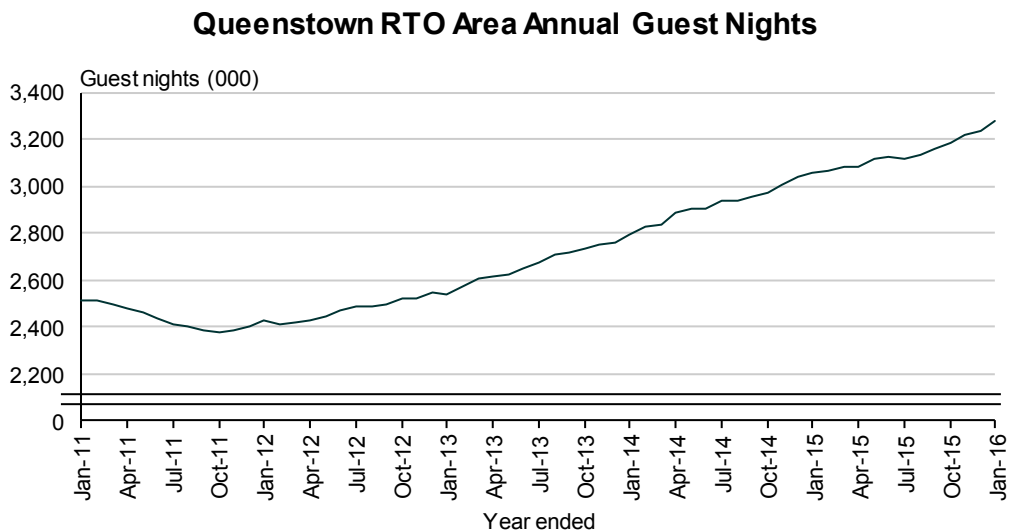
Source: Statistics New Zealand

Year ended highlights

For the year ended January 2016 compared with the previous year:

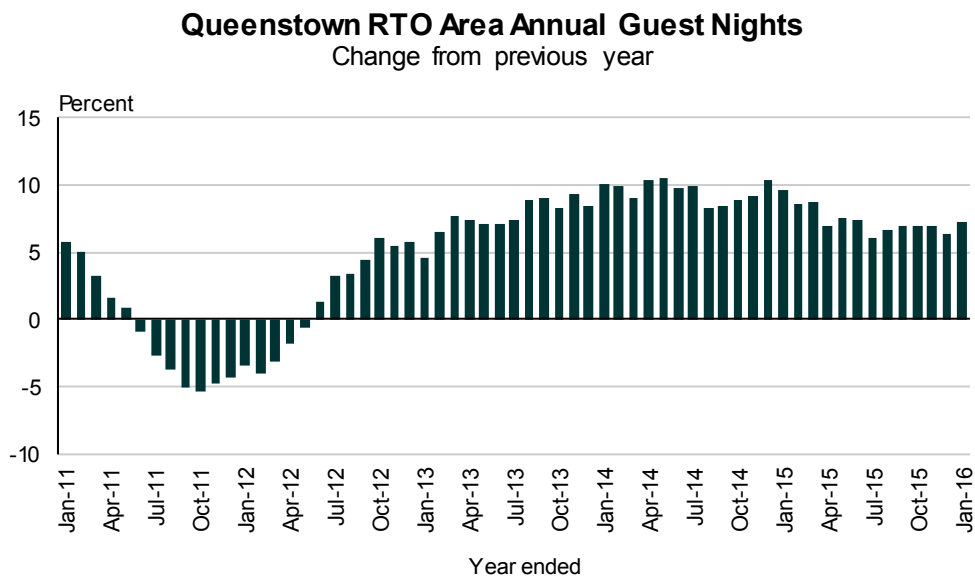
- Guest nights rose 7.2 percent to 3,276,802
- International guest nights rose 9.6 percent to 2,205,629
- Domestic guest nights rose 2.4 percent to 1,071,173
- The average length of stay rose from 2.71 nights to 2.72 nights
- The overall occupancy rate rose from 61.1 percent to 66.5 percent
- The occupancy rate, excluding holiday parks, was 72.5 percent for the year ended January 2016
- Accommodation capacity, excluding holiday parks, fell 2.0 percent.

Figure 1.3



Source: Statistics New Zealand

Figure 1.4



Source: Statistics New Zealand

2 Accommodation variables

In January 2016, compared with January 2015, there was an increase of 11.5 percent in total guest nights for the Queenstown RTO area. Hotels had the largest increase, followed by backpackers.

For the year ended January 2016, compared with the previous January year, total guest nights for the Queenstown RTO area increased 7.2 percent. Hotels had the largest increase, followed by backpackers.

See table 2.1 for comparisons of data across the main accommodation variables.

Table 2.1

Queenstown Accommodation Variables*By accommodation type
Monthly and year ended⁽¹⁾⁽²⁾*

Accommodation type	Monthly			Annual		
	January		Percentage change	Year ended		Percentage change
	2015	2016		January 2015	January 2016	
Guest nights						
Total guest nights	331,008	369,008	11.5	3,057,466	3,276,802	7.2
International	221,743	254,679	14.9	2,011,534	2,205,629	9.6
Domestic	109,264	114,329	4.6	1,045,932	1,071,173	2.4
Hotels	159,932	181,337	13.4	1,569,808	1,704,623	8.6
Motels/apartments	69,766	72,668	4.2	629,101	648,863	3.1
Backpackers	57,839	65,665	13.5	565,906	605,123	6.9
Holiday parks	43,471	49,338	13.5	292,651	318,193	8.7
Occupancy rates⁽³⁾ (%)						
Hotels	85.7	92.2	7.5	72.1	77.4	7.3
Motels/apartments	73.1	80.8	10.5	57.2	61.5	7.5
Backpackers	79.2	87.8	10.9	66.2	71.1	7.5
Holiday parks	47.5	56.7	19.4	26.9	32.0	19.1
Total	76.3	83.9	9.9	61.1	66.5	8.8
Total excluding holiday parks ⁽⁴⁾	81.2	88.7	9.2	67.4	72.5	7.6
Average length of stay⁽⁵⁾						
Hotels	2.54	2.47	-2.7	2.81	2.72	-3.5
Motels/apartments	2.68	2.70	0.7	2.84	2.97	4.7
Backpackers	2.53	2.25	-10.9	2.63	2.76	4.8
Holiday parks	2.25	2.33	3.7	2.21	2.31	4.4
Total	2.52	2.45	-2.9	2.71	2.72	0.4
Guest arrivals						
Hotels	62,956	73,367	16.5	557,672	627,311	12.5
Motels/apartments	26,066	26,961	3.4	221,853	218,611	-1.5
Backpackers	22,899	29,177	27.4	215,164	219,488	2.0
Holiday parks	19,319	21,136	9.4	132,189	137,670	4.1
Total	131,240	150,641	14.8	1,126,877	1,203,080	6.8
Establishments						
Hotels	33	33	0.0	33	33	0.0
Motels/apartments	54	53	-1.9	54	53	-1.9
Backpackers	20	21	5.0	20	21	5.0
Holiday parks	7	7	0.0	7	7	0.0
Total	114	114	0.0	114	114	0.0
Capacity⁽⁶⁾						
Hotels	96,627	95,573	-1.1	1,140,200	1,147,886	0.7
Motels/apartments	36,580	34,007	-7.0	446,736	419,313	-6.1
Backpackers	67,921	65,596	-3.4	799,443	771,351	-3.5
Holiday parks	34,131	34,410	0.8	432,649	402,423	-7.0
Total	235,259	229,586	-2.4	2,819,028	2,740,973	-2.8

(1) Reclassifications, new businesses, ceased businesses, and temporary closures may affect figures.

(2) Irregular events, such as airshows and Easter, may affect percentage changes and other figures.

(3) Occupancy rates are calculated as the ratio of used stay-unit nights to available stay-unit nights.

(4) Holiday parks often have high capacity and can mislead when included in total occupancy rates.

(5) Average length of stay is calculated as the ratio of guest nights to guest arrivals.

(6) Capacity is calculated as the number of available stay-units multiplied by the number of days in the month.

Symbol:

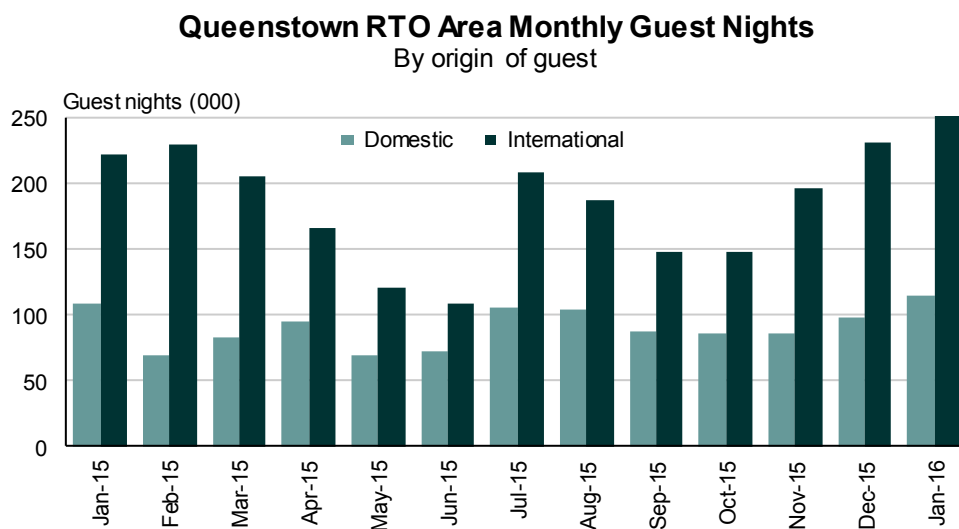
C confidential

3 Origin of guests

In January 2016, international guests accounted for 69 percent of all guest nights in the Queenstown RTO area. When compared with January 2015, the number of international guest nights spent in the area in January 2016 was up 14.9 percent to 254,679. Domestic guest nights increased 4.6 percent, to 114,329, for the same period.

The proportion of the origin-of-guest estimate from actual data was 84 percent for January 2016.

Figure 3.1



Source: Statistics New Zealand

Table 3.1

Queenstown and New Zealand Monthly Guest Nights
By origin of guest

		Queenstown RTO ⁽¹⁾ area			New Zealand		
		Origin of guest		Total	Origin of guest		Total
		Domestic	International		Domestic	International	
Month							
2015	Jan	109,264	221,743	331,008	2,833,714	1,732,236	4,565,950
	Feb	69,467	230,017	299,484	1,900,787	1,803,851	3,704,638
	Mar	83,549	205,063	288,611	1,927,366	1,624,619	3,551,985
	Apr	94,748	166,898	261,646	1,877,594	1,246,428	3,124,021
	May	69,736	120,799	190,534	1,463,648	874,729	2,338,377
	Jun	72,719	109,126	181,844	1,241,206	691,988	1,933,195
	Jul	106,138	209,229	315,368	1,597,300	869,716	2,467,016
	Aug	103,539	187,663	291,202	1,473,688	827,051	2,300,740
	Sep	87,910	148,450	236,360	1,588,557	887,062	2,475,619
	Oct	85,336	147,390	232,726	1,772,303	1,061,184	2,833,487
	Nov	86,250	195,838	282,089	1,695,774	1,411,223	3,106,997
	Dec	97,452	230,478	327,930	2,164,026	1,687,843	3,851,869
2016	Jan	114,329	254,679	369,008	2,922,729	1,921,161	4,843,891
Percent change from the current month of the previous year							
		4.6	14.9	11.5	3.1	10.9	6.1
Year ended							
January 2015		1,045,932	2,011,534	3,057,466	20,882,873	13,896,219	34,779,091
January 2016		1,071,173	2,205,629	3,276,802	21,624,978	14,906,856	36,531,834
Percent change from previous year							
		2.4	9.6	7.2	3.6	7.3	5.0

(1) Regional tourism organisation

4 National results

In January 2016, a total of 4,844,000 guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 278,000 nights (6.1 percent) from January 2015.

All four accommodation types recorded an increase in guest nights in January 2016, compared with January 2015. Hotels had the largest increase in guest nights (up 119,000 or 9.8 percent), followed by motels (up 84,000 or 6.7 percent), backpacker accommodation (up 47,000 or 8.8 percent), and holiday parks (up 27,000 or 1.7 percent).

For the year ended January 2016, there were 36,532,000 guest nights, an increase of 1,753,000 (5.0 percent) from the previous January year.

Refer to Table 4.1 for comparisons of data.

Table 4.1

Queenstown and New Zealand Guest Nights

*By accommodation type
Monthly and year ended*

Accommodation type	Total guest nights			Percentage change	
	2014	2015	2016	2014 to 2015	2015 to 2016
January month					
Queenstown RTO area					
Hotels	151,373	159,932	181,337	5.7	13.4
Motels	68,203	69,766	72,668	2.3	4.2
Backpackers	57,293	57,839	65,665	1.0	13.5
Holiday parks	40,045	43,471	49,338	8.6	13.5
Total	316,913	331,008	369,008	4.4	11.5
New Zealand					
Hotels	1,135,831	1,213,928	1,333,333	6.9	9.8
Motels	1,249,653	1,255,730	1,339,970	0.5	6.7
Backpackers	521,342	538,012	585,096	3.2	8.8
Holiday parks	1,490,987	1,558,281	1,585,492	4.5	1.7
Total	4,397,814	4,565,950	4,843,891	3.8	6.1
Year ended January					
Queenstown RTO area					
Hotels	1,476,899	1,569,808	1,704,623	6.3	8.6
Motels	549,426	629,101	648,863	14.5	3.1
Backpackers	521,804	565,906	605,123	8.5	6.9
Holiday parks	242,645	292,651	318,193	20.6	8.7
Total	2,790,774	3,057,466	3,276,802	9.6	7.2
New Zealand					
Hotels	11,497,439	12,285,558	12,951,285	6.9	5.4
Motels	10,694,829	11,007,604	11,547,815	2.9	4.9
Backpackers	4,442,536	4,815,194	4,981,460	8.4	3.5
Holiday parks	6,329,215	6,670,734	7,051,275	5.4	5.7
Total	32,964,019	34,779,091	36,531,834	5.5	5.0

5 Regional comparison

In January 2016, Canterbury recorded the largest increase in guest nights (up 49,000 or 13.2 percent) from January 2015. This was followed by Queenstown (up 38,000 or 11.5 percent), Auckland (up 26,000 or 3.8 percent), Rotorua (up 20,000 or 8.5 percent), and Hawke's Bay (up 19,000 or 13.0 percent).

Northland recorded the largest decrease (down 11,000 or 3.1 percent), followed by Coromandel (down 11,000 or 5.8 percent), Gisborne (down 5,000 or 6.8 percent), Whanganui (down 2,000 or 7.3 percent), and Ruapehu (down 1,000 or 2.1 percent).

Table 5.1

Regional Tourism Organisation Areas' Monthly Guest Nights*By origin of guest*

RTO area	January guest nights								
	Domestic			International			Total		
	2015	2016	Percent age change	2015	2016	Percent age change	2015	2016	Percent age change
Northland	271,424	254,870	-6.1	91,779	97,116	5.8	363,202	351,986	-3.1
Auckland	382,507	394,322	3.1	311,257	325,624	4.6	693,764	719,946	3.8
Coromandel	148,494	137,755	-7.2	41,935	41,536	-1.0	190,429	179,291	-5.8
Waikato	106,780	109,721	2.8	34,958	38,563	10.3	141,739	148,283	4.6
Bay of Plenty	137,737	144,610	5.0	30,966	30,524	-1.4	168,703	175,133	3.8
Rotorua	123,351	131,180	6.3	110,418	122,442	10.9	233,769	253,622	8.5
Taupo	79,933	90,003	12.6	50,297	45,931	-8.7	130,229	135,934	4.4
Whakatane-									
Kaw erau	49,182	49,219	0.1	5,090	6,364	25.0	54,272	55,583	2.4
Gisborne	63,089	59,687	-5.4	8,158	6,687	-18.0	71,247	66,374	-6.8
Taranaki	72,166	83,508	15.7	8,970	11,926	33.0	81,136	95,433	17.6
Haw ke's Bay	110,775	122,433	10.5	34,221	41,357	20.9	144,996	163,790	13.0
Ruapehu	19,645	20,524	4.5	23,007	21,222	-7.8	42,652	41,746	-2.1
Manaw atu	39,865	39,897	0.1	5,192	5,750	10.7	45,058	45,647	1.3
Whanganui	19,691	17,535	-10.9	5,630	5,945	5.6	25,321	23,480	-7.3
Wairarapa	26,442	25,555	-3.4	4,034	5,018	24.4	30,476	30,573	0.3
Kapiti-Horow henua	29,438	30,569	3.8	3,213	3,987	24.1	32,651	34,556	5.8
Wellington	137,131	147,394	7.5	88,605	96,775	9.2	225,736	244,169	8.2
Marlborough	52,053	50,911	-2.2	44,769	49,731	11.1	96,822	100,642	3.9
Nelson-Tasman	211,126	210,316	-0.4	75,794	79,370	4.7	286,921	289,686	1.0
Canterbury	198,260	211,489	6.7	173,283	208,963	20.6	371,543	420,452	13.2
Hurunui	40,248	41,082	2.1	12,258	13,413	9.4	52,506	54,495	3.8
Mackenzie	22,215	28,260	27.2	50,378	58,894	16.9	72,592	87,154	20.1
Timaru	36,829	34,728	-5.7	7,746	10,482	35.3	44,575	45,210	1.4
West Coast	74,071	72,777	-1.7	103,566	115,047	11.1	177,637	187,824	5.7
Wanaka	55,172	55,740	1.0	45,031	55,950	24.2	100,203	111,690	11.5
Queenstow n	109,264	114,329	4.6	221,743	254,679	14.9	331,008	369,008	11.5
Waitaki	51,563	51,490	-0.1	16,738	22,858	36.6	68,301	74,348	8.9
Central Otago	57,918	64,197	10.8	11,532	13,463	16.7	69,450	77,660	11.8
Dunedin	46,918	59,706	27.3	40,887	45,662	11.7	87,805	105,368	20.0
Clutha	8,201	10,309	25.7	4,792	3,685	-23.1	12,993	13,993	7.7
Fiordland	27,353	29,442	7.6	50,485	60,815	20.5	77,838	90,257	16.0
Southland	24,876	29,171	17.3	15,504	21,385	37.9	40,380	50,557	25.2
Total	2,833,714	2,922,729	3.1	1,732,236	1,921,161	10.9	4,565,950	4,843,891	6.1

Table 5.2

Regional Tourism Organisation Areas' Monthly Occupancy Rates⁽¹⁾*By accommodation type*

RTO area	January 2016 occupancy rate					
	Accommodation type					
	Hotels	Motels	Backpackers	Holiday parks	Total	Total excluding holiday parks ⁽²⁾
	Percent					
Northland	59.8	68.1	64.3	40.1	49.6	64.5
Auckland	82.9	65.1	63.1	37.8	69.2	74.2
Coromandel	56.2	68.7	65.8	41.9	49.3	65.8
Waikato	49.6	57.1	51.5	33.5	45.6	53.6
Bay of Plenty	65.9	72.4	44.3	43.0	51.0	59.8
Rotorua	83.6	77.4	34.3	43.3	57.7	61.5
Taupo	68.9	73.8	68.4	31.5	57.7	70.9
Whakatane-Kaw erau	C	66.4	C	C	39.6	C
Gisborne	C	62.3	C	31.2	38.9	51.8
Taranaki	45.5	65.7	34.2	53.1	52.3	51.8
Haw ke's Bay	64.7	78.1	55.8	44.4	58.9	68.3
Ruapehu	37.4	37.0	25.6	40.9	33.0	31.3
Manaw atu	28.5	47.2	C	C	34.2	C
Whanganui	C	54.3	35.1	C	36.2	C
Wairarapa	C	60.6	C	19.2	33.1	52.1
Kapiti-Horow henua	C	55.5	C	25.7	30.8	36.6
Wellington	73.0	64.2	C	C	65.6	C
Marlborough	70.5	70.3	55.4	33.1	53.0	62.7
Nelson-Tasman	67.2	76.8	71.3	54.1	62.9	72.9
Canterbury	75.7	71.3	48.0	37.0	55.1	64.4
Hurunui	C	66.8	C	37.3	46.7	54.6
Mackenzie	C	66.4	C	46.7	66.8	76.6
Timaru	41.9	75.5	33.7	39.8	49.1	61.8
West Coast	57.8	77.4	68.9	42.9	60.1	67.8
Wanaka	79.9	89.3	71.7	42.3	60.1	78.8
Queenstow n	92.2	80.8	87.8	56.7	83.9	88.7
Waitaki	41.2	72.5	61.3	16.2	24.1	55.4
Central Otago	C	73.6	C	34.0	38.7	54.2
Dunedin	71.7	76.4	60.6	60.2	68.9	71.0
Clutha	C	49.4	C	51.7	47.5	42.8
Fiordland	84.2	74.4	60.7	43.7	62.6	71.5
Southland	44.7	53.0	53.7	25.1	42.2	50.4
Total	72.8	68.3	56.9	38.2	55.9	66.2

(1) Occupancy rates are calculated as the ratio of stay unit nights to monthly capacity.

(2) Occupancy rates excluding holiday parks are included because the capacity of holiday parks can distort the total occupancy rates.

Symbols:

C confidential

... not applicable

6 Accommodation Survey technical notes

Population

The target population for the Accommodation Survey is all 'geographic units' (called 'establishments' in this publication) that are classified as short-term (less than one month) commercial accommodation providers operating in New Zealand. In terms of the Australian and New Zealand Standard Industrial Classification 2006 (ANZSIC06), the target population is taken from class 4400 (accommodation), and the part of class 4520 (pubs, taverns, and bars) that also provides accommodation.

The survey frame is all short-term commercial accommodation-providing geographic units belonging to an economically significant enterprise. Economic significance is generally determined as being GST registered and having a turnover of at least \$30,000 per year. Any geographic unit classified as a hosted accommodation type is excluded from the survey.

Confidentiality and suppression

Data collected and information contained in this report must conform to the provisions of the Statistics Act 1975. This requires that published information maintains the confidentiality of respondents. Cell suppression has been used to prevent the disclosure of sensitive information and is represented by a 'C' in the tables.

Rounding is applied to produce 'confidentialised' data. The rounding to 'origin of guest' data means that subtotals may not add up to the totals shown.

Some data have been suppressed due to low response rates. These are represented by 'S' in the tables.

Data reliability

This survey aims for 100 percent coverage of the population (a full census). However, in practice an overall response rate of between 76 and 80 percent is usually achieved. The remaining units are given imputed values based on the characteristics of similar establishments in the same or similar regions. Imputation introduces unknown errors into the estimates, and users of the data should bear this in mind. The size of these unknown errors is difficult to quantify.

Other errors occur for reasons such as respondent error, frame quality, and errors in processing. While every effort is made to minimise these errors, they will still occur. It is not possible to quantify their effect.

Comparison with other statistical sources

Care should be used when comparing statistics from the Accommodation Survey with other sources. The target populations and methodologies may not be comparable. For example, 'average length of stay' figures from the Accommodation Survey combine international and domestic guests, whereas the average length of stay figures published from the International Visitor Survey cover only international guests.

Classifications and definitions

Accommodation type is generally determined by the type that contributes the majority of an establishment's capacity. For instance, if a business provides both motel and camping ground accommodation, but the majority of its stay units are motel rooms, then it would be classified as a motel. The classification system used is the New Zealand Accommodation Classification, broadly defined below:

- Hotels: includes both hotels and resorts
- Motels: includes motor inns, apartments, and motels
- Backpackers/hostels
- Caravan parks/camping grounds.

Changes to survey content

Establishments may change the way they operate over time. If they do, they may be reclassified from one accommodation type to another. For example, if a holiday park adds sufficient motel units that it is operating more as a motel than a holiday park, it will be subject to reclassification to the 'motels' accommodation type. This type of change will tend to reduce surveyed guest nights and other figures for holiday parks (because there would be one fewer holiday park) while boosting guest nights and other figures for motels (because there would be one more motel).

Guest night and other movements, where the latest month is compared with the same month of the previous year, are affected for 12 months from the time that any reclassification is done. After 12 months, the reclassified establishment will appear in the same accommodation type in both comparison months.

Reclassifications of establishments are not the only changes that affect survey content and figures for the Accommodation Survey:

- When establishments temporarily cease operations, we take them out of the survey until they re-open. These changes affect figures for the number of establishments and available capacity.
- Businesses that start up, shut down, or move into or out of the short-term commercial accommodation industry also affect survey figures.

Further information is available on the Tourism Research website, www.tourismresearch.govt.nz or on request from Statistics New Zealand.

For definitions of other terms, please search for 'survey participants accommodation survey' on the Statistics NZ website (www.stats.govt.nz).



holidayparks
ASSOCIATION OF NEW ZEALAND

Peak Season Holiday Park Visitors

Expenditure & Behaviour Research Summary Report

April 2015

angus
& ASSOCIATES



Background & Methodology

Objective

To better understand the profile and expenditure behaviour of peak season holiday park visitors and the economic contribution being made by holiday parks - especially at a community level.

The 2014/15 research updates previous research undertaken in 2006/07, 2009/10 and 2012/13. It includes sample collected in February for the first time.

- 398 randomly selected respondents interviewed on iPads at 13 holiday parks between 27 December 2014 and 6 January 2015 (232 domestic, 166 international)
- 273 randomly selected respondents were also interviewed at the same holiday parks between 16 and 23 February 2015 (113 domestic, 160 international)
- For comparative purposes the December-January sample from each year is weighted by park and respondent origin to match the 2006/07 base sample
- The sample collected in February 2015 is unweighted, as sampling has not occurred at this time of year previously
- Data collected includes demographics, group size/composition, length of stay, mode of transport, country/region of origin, and detailed expenditure behaviour
- Expenditure was recorded for the 24 hour period immediately prior to the interview (or since arrival if the interview was in the first 24 hours)

Sample

	Dec 2014-Jan 2015			Feb 2015		
Holiday Park	Domestic	International	Total	Domestic	International	Total
Western Bay of Plenty	101	4	105	40	10	50
Waihi Beach Top 10 Holiday Park	31	0	31	10	3	13
Bowentown Beach Holiday Park	47	2	49	20	4	24
Athenree Hot Springs	23	2	25	13	10	3
Rotorua/Taupo	36	36	72	23	57	80
Rotorua Top 10 Holiday Park	7	16	23	0	19	19
Cosy Cottage Int'l Holiday Park	4	12	16	1	10	11
All Seasons Taupo	11	4	15	7	14	21
De Bretts Taupo	14	4	18	15	14	29
Christchurch	35	72	107	20	53	73
Christchurch Top 10 Holiday Park	14	34	48	3	23	26
North South Holiday Park	16	18	34	6	15	21
Amber Holiday Park	5	20	25	11	15	26
Queenstown/Cromwell	60	54	114	30	40	70
Cromwell Top 10 Holiday Park	47	1	48	19	1	20
Queenstown Top 10 Holiday Park	6	37	43	5	20	25
Shotover Top 10 Holiday Park	7	16	23	6	19	25
TOTAL	232	166	398	113	160	273

Peak Season Holiday Park Visitor Profile

	Domestic	International
Western Bay of Plenty		
Dec 2014- Jan 2015	96%	4%
All 2014/2015 (incl. Feb)	91%	9%
Rotorua/Taupo		
Dec 2014- Jan 2015	50%	50%
All 2014/2015 (incl. Feb)	39%	61%
Christchurch		
Dec 2014- Jan 2015	33%	67%
All 2014/2015 (incl. Feb)	31%	69%
Queenstown/Cromwell		
Dec 2014- Jan 2015	53%	47%
All 2014/2015 (incl. Feb)	49%	51%
TOTAL DEC 2014-JAN 2015	58%	42%
TOTAL 2014/2015 (incl. Feb)	51%	49%

Domestic respondents make up 58% of the un-weighted December to January sample - compared with 66% in 2012/13, 71% in 2009/10 and 66% in 2006/07.

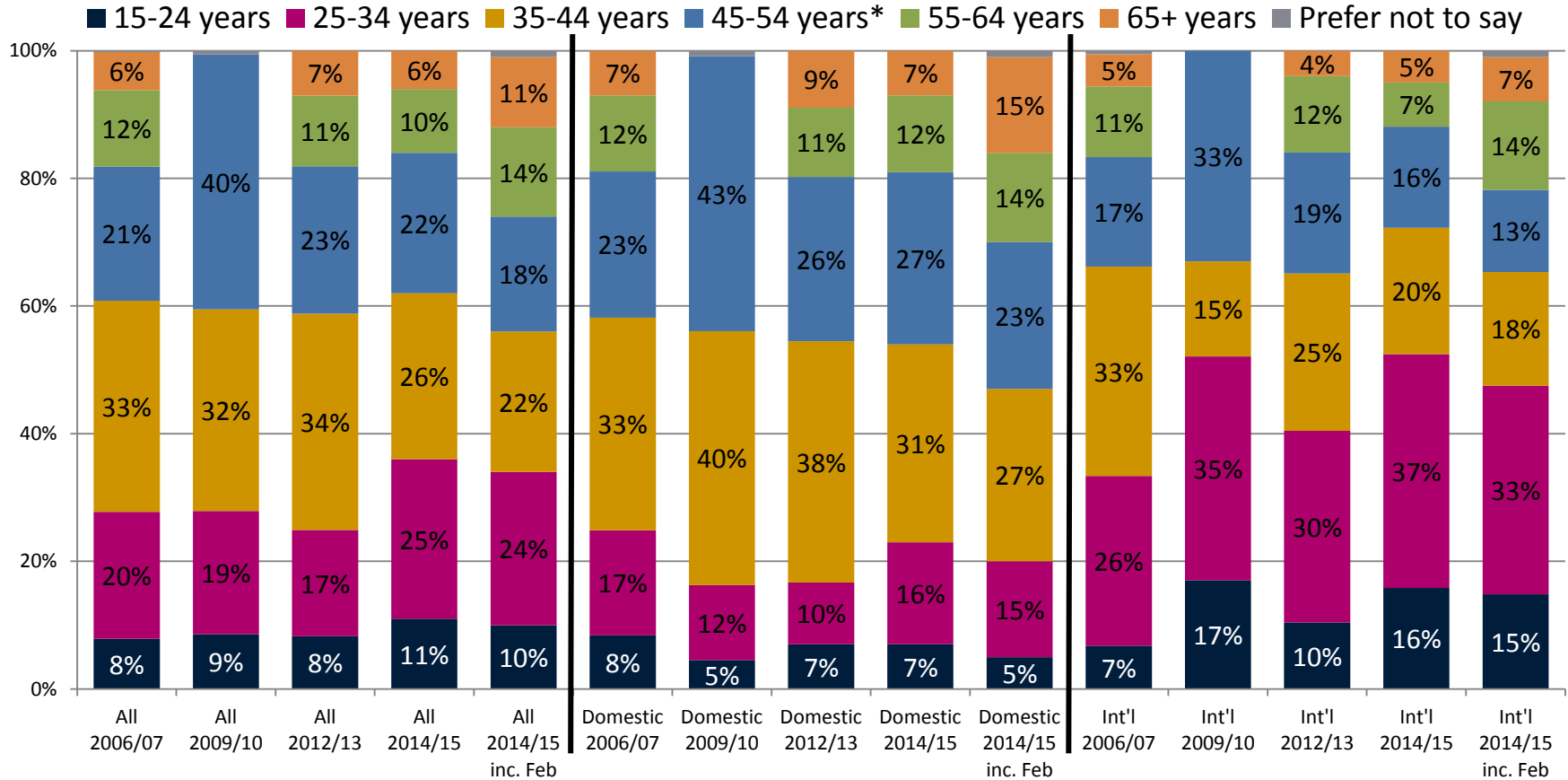
The 2014-2015 data with February included is made up of almost equal proportions of domestic and international visitors (51% to 49%).

Gender split is relatively even, as it was in previous years.

	All Visitors	Domestic	International
Dec 2014- Jan 2015			
Male	46%	43%	52%
Female	54%	57%	48%
All 2014/2015 incl. Feb			
Male	49%	43%	54%
Female	51%	57%	46%

Holiday Park Visitor Profile Cont.

Age Distribution of Holiday Park Visitors



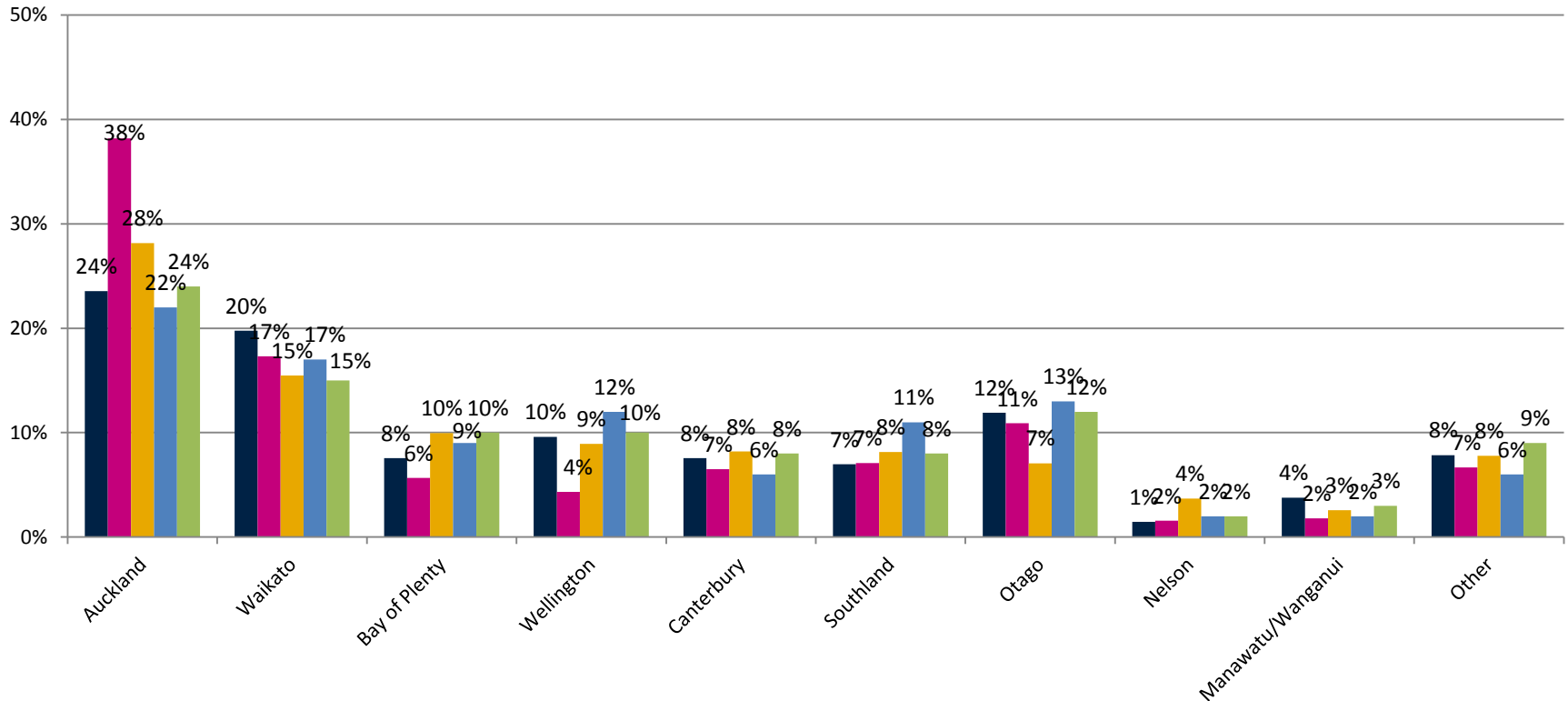
Middle aged visitors continue to dominate the domestic market, with older visitors more common during February. In contrast, a large proportion of international visitors are aged under 35 (53%).

*In 2009/10 the '55-64 year' category was inadvertently excluded from the questionnaire. As such respondents aged over 44 have been grouped together for that season.

Peak Season Holiday Park Visitor Profile Cont.

Origin of Holiday Park Visitors - Domestic

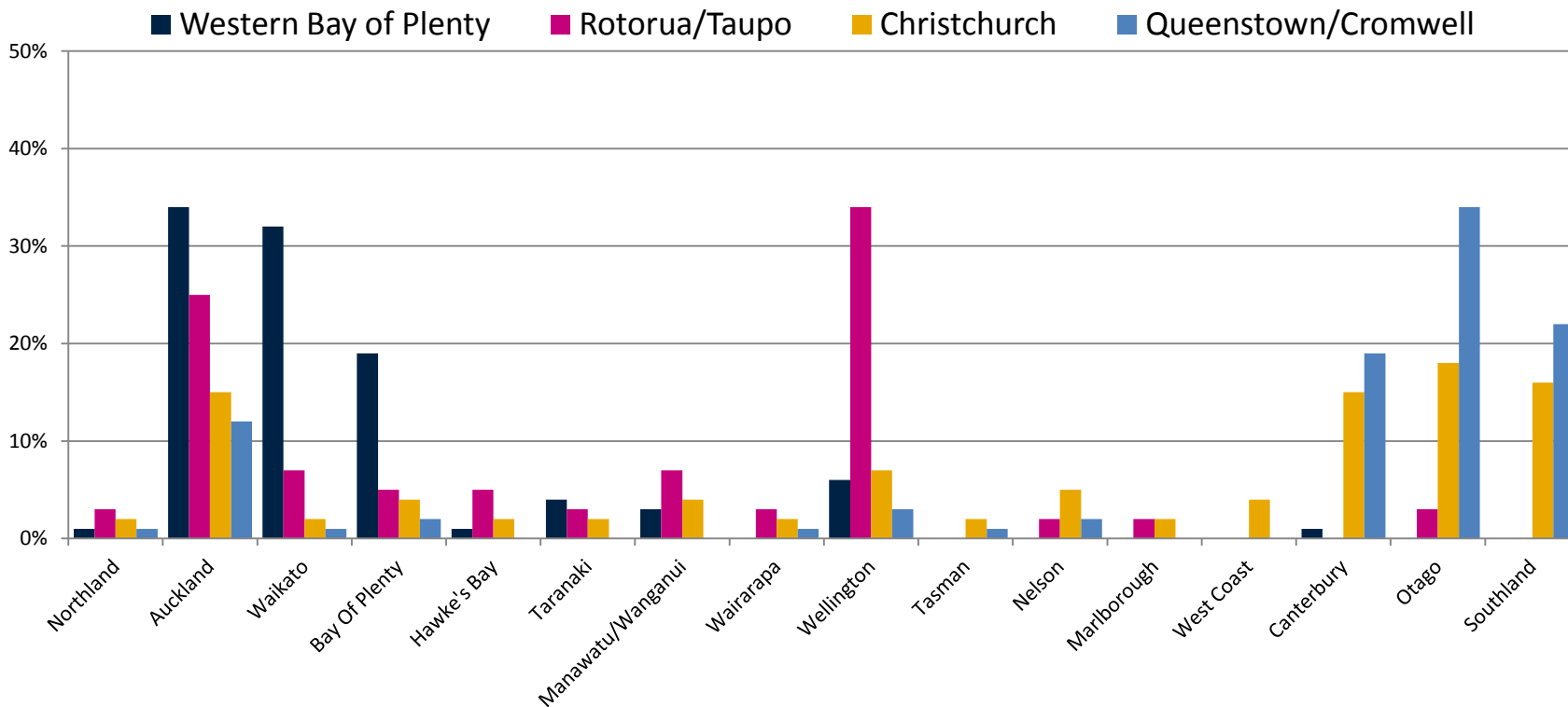
■ 2006/07 ■ 2009/10 ■ 2012/13 ■ 2014/2015 ■ 2014/15 (inc. Feb)



Note: This distribution is specific to the subject holiday parks - the national picture is likely to be somewhat different.

Peak Season Holiday Park Visitor Profile Cont.

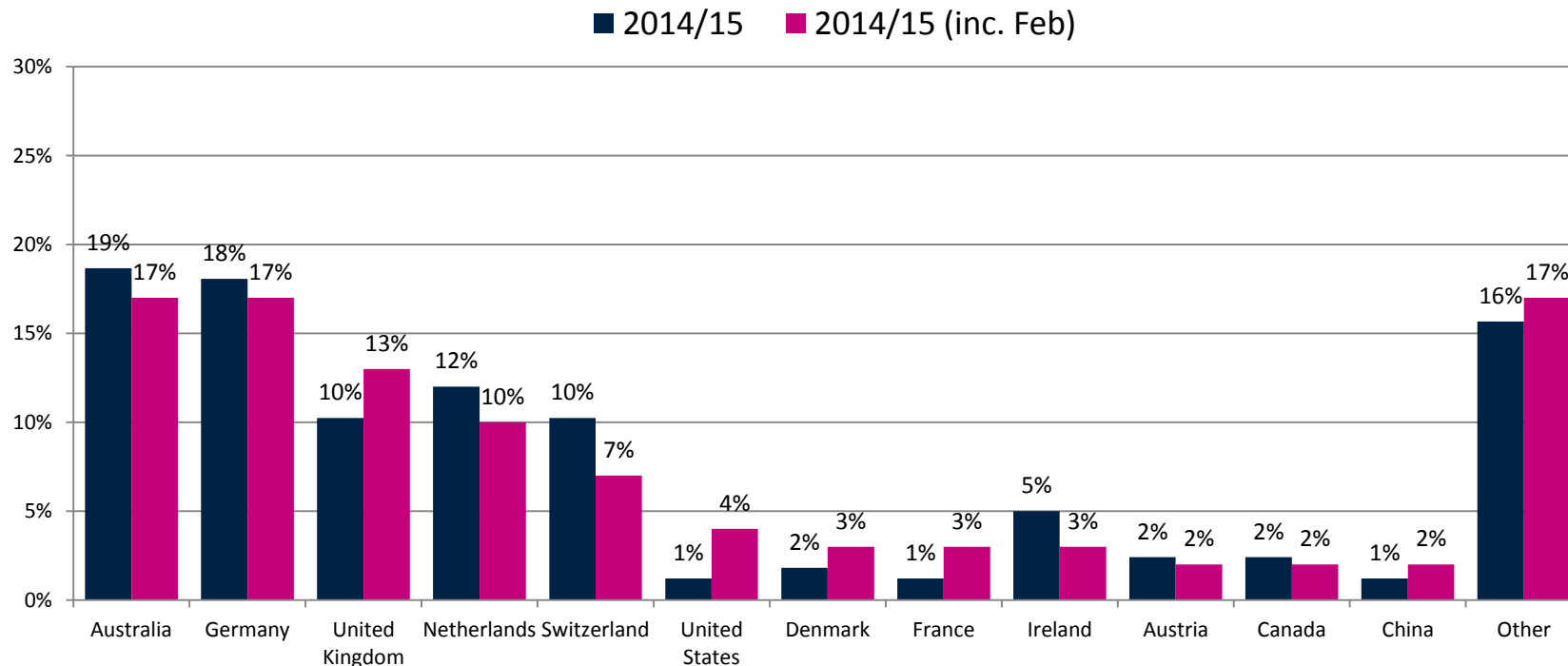
Origin of Domestic Holiday Park Visitors by Region (2014/2015)



The chart shows the proportion of domestic visitors from each origin region staying in each subject region. For example, it shows that two thirds of domestic holiday park visitors in Western Bay of Plenty were from Auckland or Waikato. The majority of visitors to each region tend to come from neighboring regions.

Peak Season Holiday Park Visitor Profile Cont.

Origin of Holiday Park Visitors - International

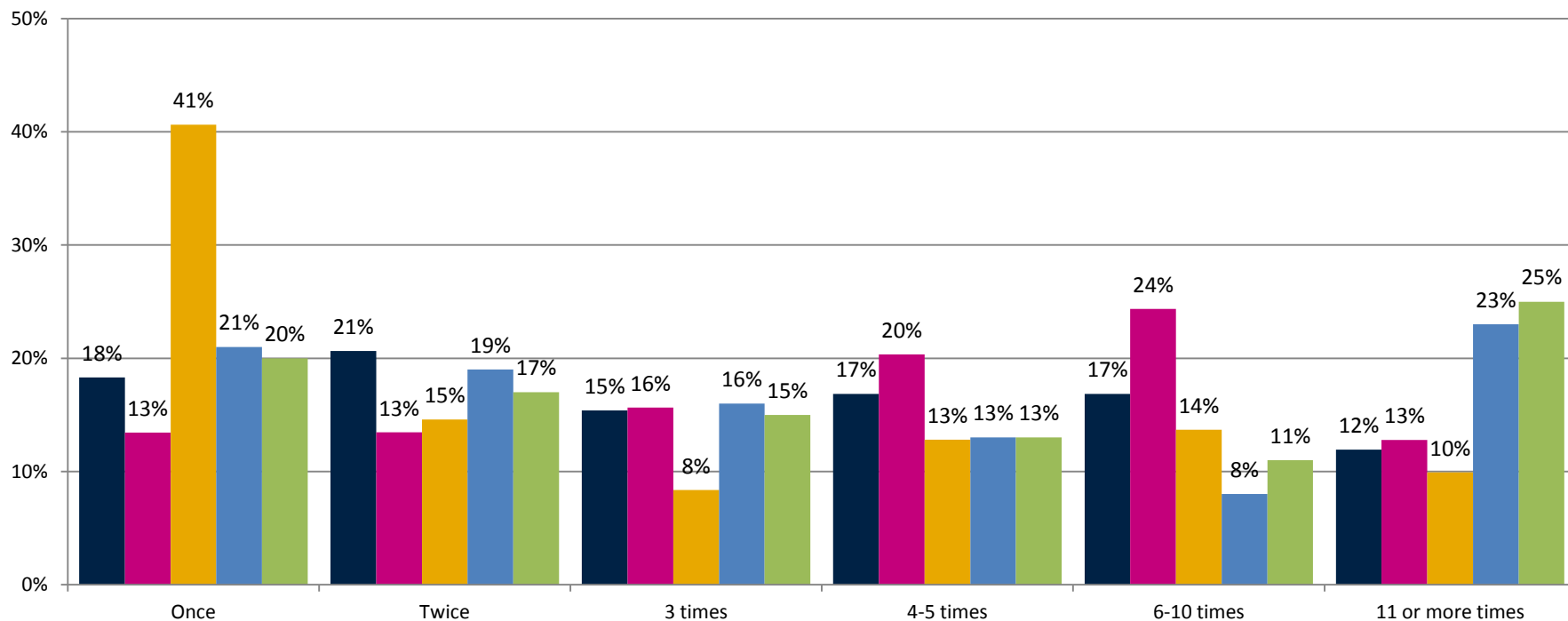


Visitors from 37 countries were represented in the 2014/2015 international sample, but most commonly international guests were from Australia, Germany or the UK. In 2014/15 (incl. Feb) European respondents made up two thirds of the international sample (69% for Dec-Jan, and 63% for Feb). This is the same as in 2006/07, and greater than the 58% reported in 2012/13.

Frequency of Holiday Park Use

Frequency of Holiday Park Use (Last 2yrs) Domestic Visitors

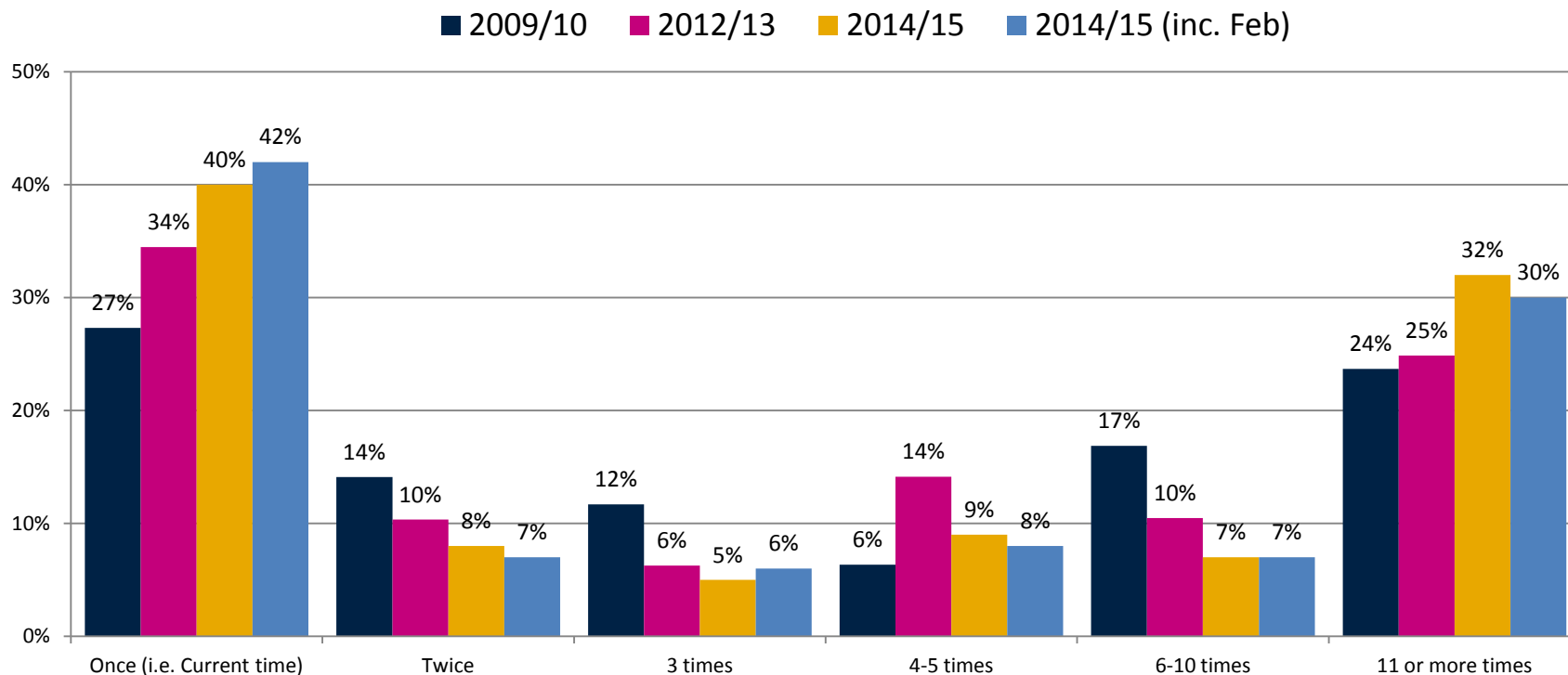
■ 2006/07 ■ 2009/10 ■ 2012/13 ■ 2014/15 ■ 2014/15 (inc. Feb)



Four out of five domestic visitors had visited at least one other park in the previous two years, and almost one third had visited more than five parks in that time. Further, February guests were more frequent holiday parks users than Dec/Jan guests.

Frequency of Holiday Park Use Cont.

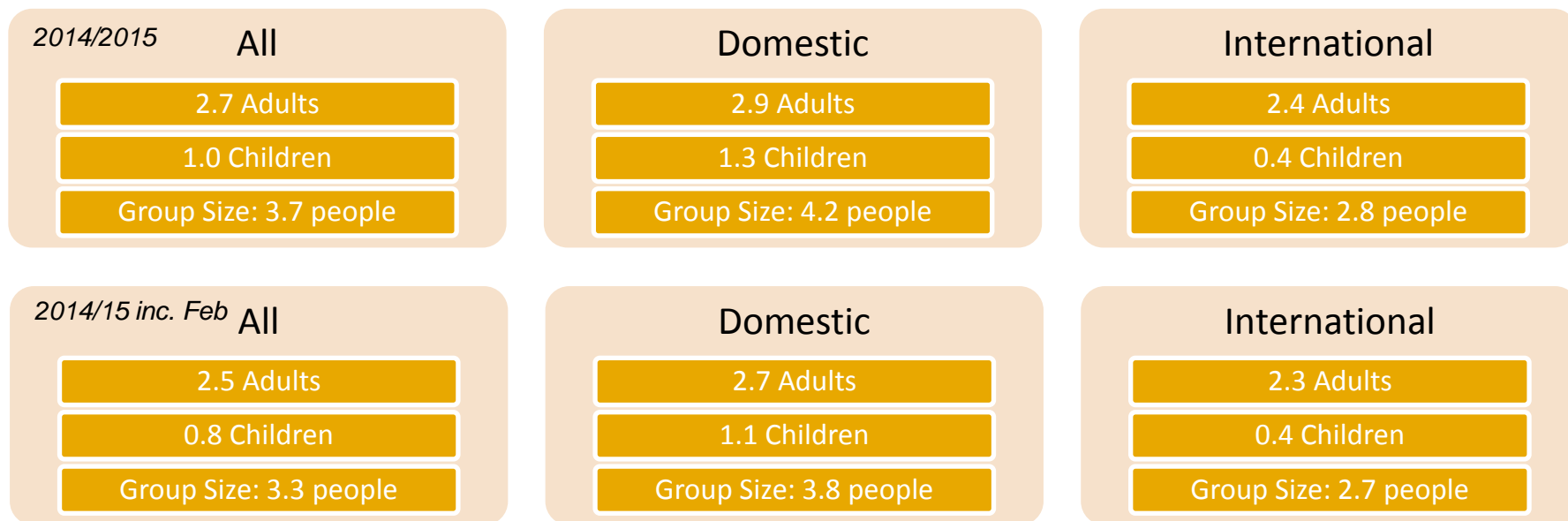
Frequency of Use - Current Holiday Park Domestic Visitors



Increasingly domestic visitors are either on their first visit to a park, or are frequent visitors to a park (have stayed more than ten times previously). The latter was the case for almost one third of 2014/15 respondents.

Travel Behaviour

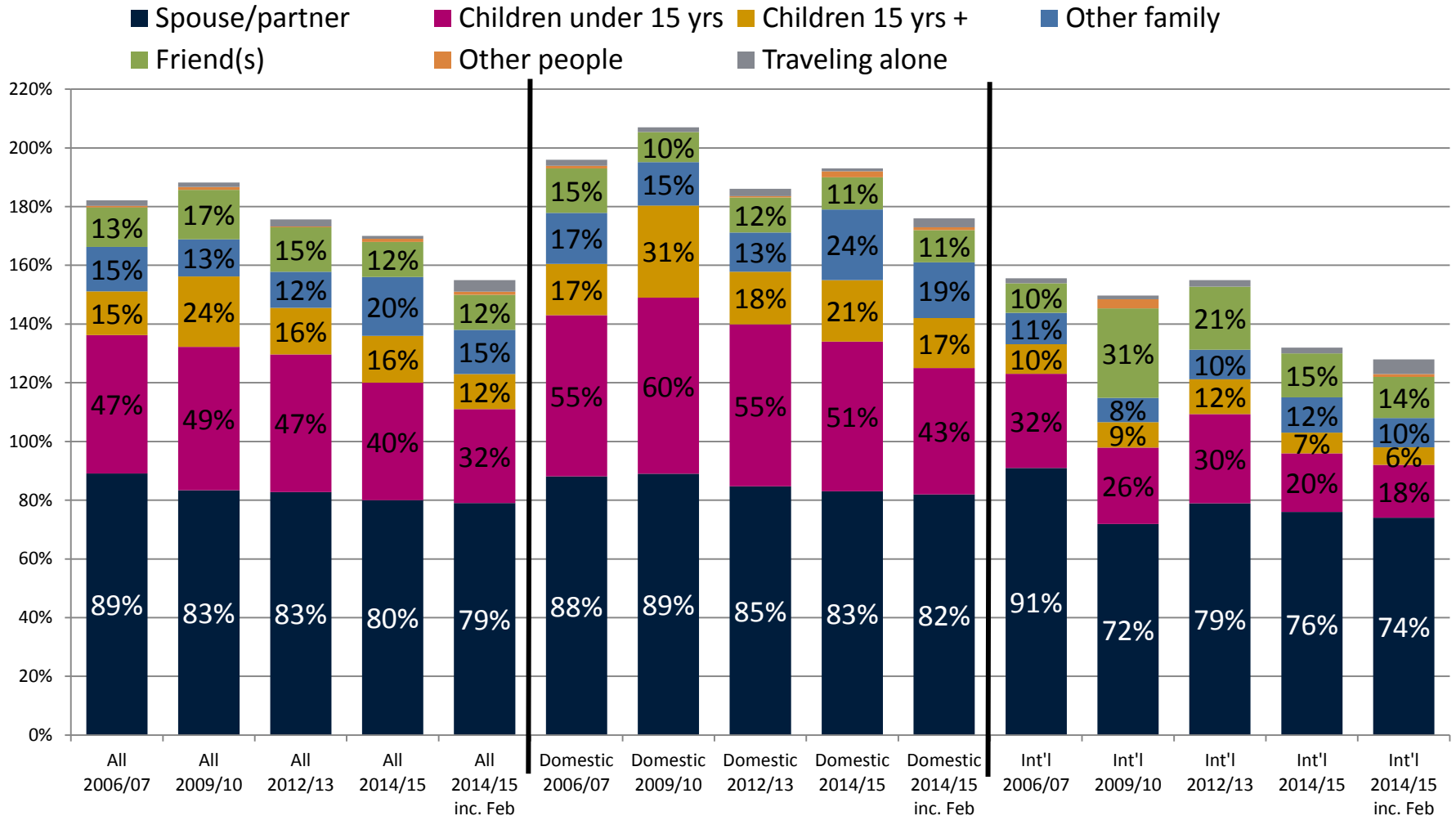
Of all visitors interviewed in the Dec-Jan period 44% were part of a group that included children (down from 49% in 2012/13, and 52% in 2009/10) and 56% were either alone, or in a group without children. Just 21% of international respondents were travelling with children, compared with 55% of domestic visitors (down from 30% and 60% in 2012/13). For the mid-February period 80% of visitors interviewed were either alone, or in a group without children.



For 2014/15 the average group size was lower than in 2012/13, when the average group size was 3.9 people (4.3 for domestic and 3.2 for international).

Travel Behaviour Cont.

Composition of Travel Party



Nights Stayed (All Visitors)

	All Visitors 2006/07	All Visitors 2009/10	All Visitors 2012/13	All Visitors 2014/2015	All Visitors 2014/2015 inc. Feb
Average total number of nights intend to spend away from home, or in NZ on current trip:	21 nights	24 nights	17 nights	19 nights	22 nights
Average number of nights spent at the subject holiday park at time of interview:	3 nights	3 nights	4 nights	3 nights	4 nights
Average intended length of stay at the holiday park where the interview took place:	7 nights	7 nights	8 nights	6 nights	6 nights
Average number of nights intend to stay at <u>other</u> holiday parks on current trip:	9 nights	10 nights	6 nights	7 nights	8 nights
Average number of nights intend to spend at <u>other types of accommodation</u> on current trip:	3 nights	3 nights	5 nights	10 nights (7 nights excl. outliers)	11 nights (8 nights excl. outliers)
Proportion of visitors intending to stay in <u>holiday parks only</u> for the duration of their trip away from home/in NZ:	65%	65%	59%	40%	38%

The travel patterns of international and domestic visitors are quite different, with domestic visitors more likely to have shorter ‘stay put’ trips at this time of year and international visitors more likely to have longer ‘touring’ trips. Visitors are also increasingly likely to use other types of accommodation on their trip.

Nights Stayed (Domestic)

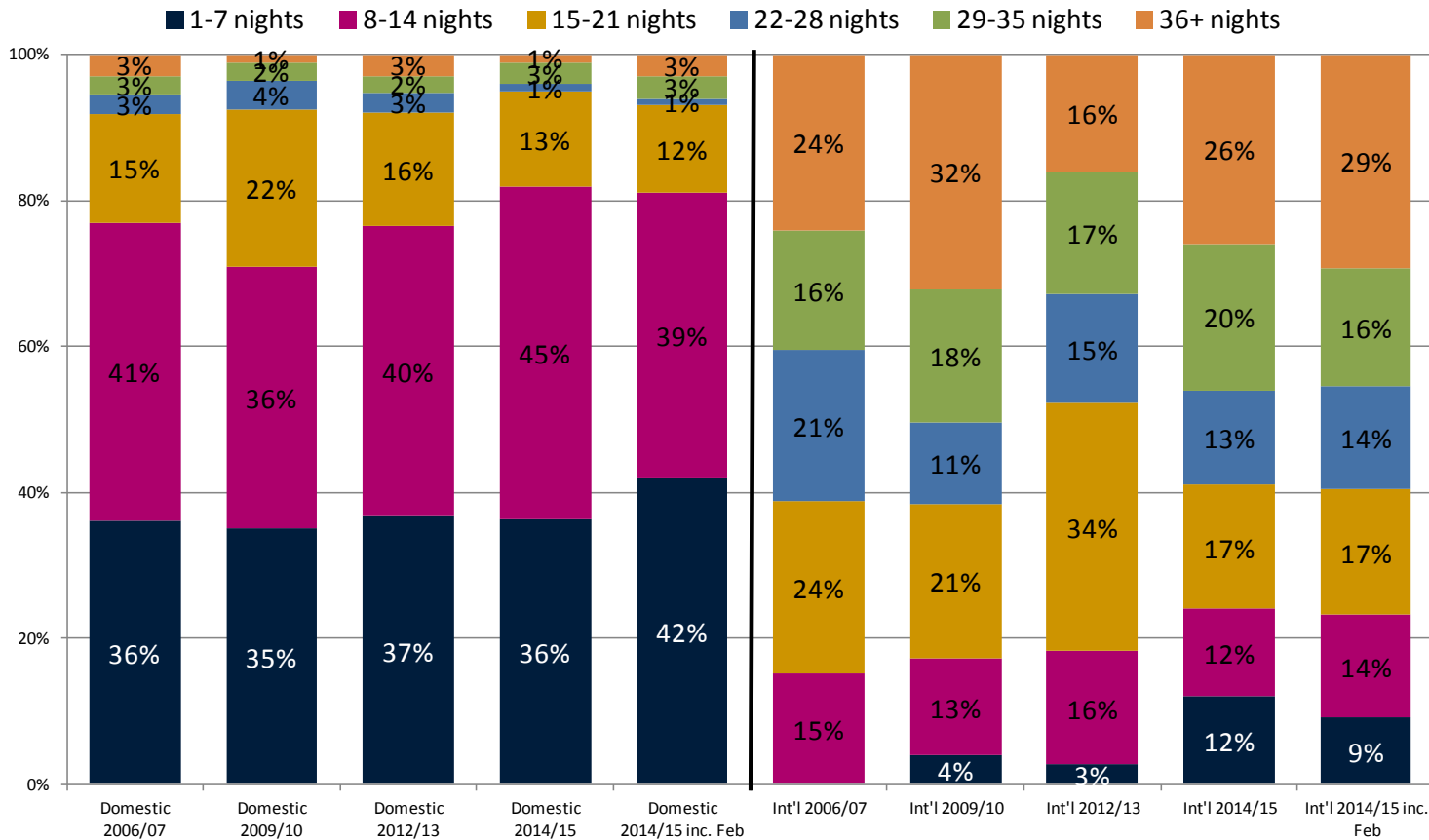
	Domestic Visitors 2006/07	Domestic Visitors 2009/10	Domestic Visitors 2012/13	Domestic Visitors 2014/2015	Domestic Visitors 2014/2015 inc. Feb
Average total number of nights intend to spend away from home, or in NZ on current trip:	13 nights	13 nights	12 nights	12 nights	13 nights
Average number of nights spent at the subject holiday park <u>at time of interview</u> :	4 nights	4 nights	6 nights	4 nights	5 nights
Average <u>intended length of stay at the holiday park</u> where the interview took place:	9 nights	9 nights	10 nights	8 nights	8 nights
Average number of nights intend to stay at <u>other</u> holiday parks on current trip:	3 nights	1 night	2 nights	2 nights	3 nights
Average number of nights intend to spend at <u>other types of accommodation</u> on current trip:	1 night	1 night	2 night	4 nights	4 nights
Proportion of visitors intending to stay in <u>holiday parks only</u> for the duration of their trip away from home/in NZ:	80%	82%	79%	56%	59%

Nights Stayed (International)

	International Visitors 2006/07	International Visitors 2009/10	International Visitors 2012/13	International Visitors 2014/2015	International Visitors 2014/2015 inc. Feb
Average total number of nights intend to spend away from home, or in NZ on current trip:	35 nights	46 nights	28 nights	31 nights	34 nights
Average number of nights spent at the subject holiday park <u>at time of interview</u> :	2 nights	1 night	1 night	2 nights	2 nights
Average <u>intended length of stay at the holiday park</u> where the interview took place:	3 nights	3 nights	2 nights	4 nights	3 nights
Average number of nights intend to stay at <u>other</u> holiday parks on current trip:	22 nights	27 nights	13 nights	16 nights	16 nights
Average number of nights intend to spend at <u>other types of accommodation</u> on current trip:	7 nights	6 nights	13 nights	22 nights (15 nights excl. outliers)	22 nights (15 nights excl. outliers)
Proportion of visitors intending to stay in <u>holiday parks only</u> for the duration of their trip away from home/in NZ:	37%	31%	20%	9%	10%

Nights Stayed Cont.

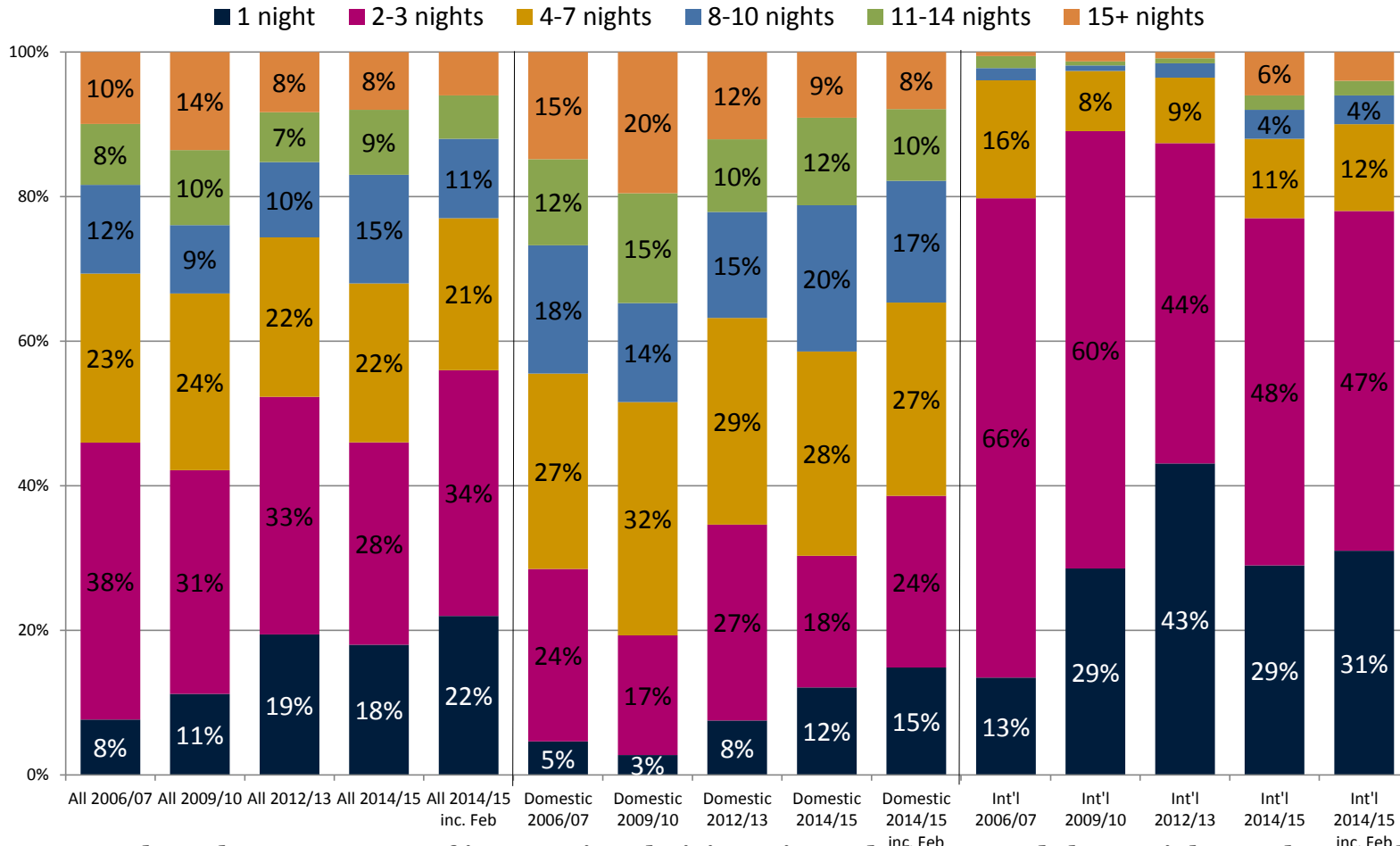
Nights Intend to Spend Away From Home (or in New Zealand)



Over three quarters of domestic holiday park visitors planned to be away from home for two weeks or less, and in contrast, more than three quarters of international holiday park visitors were visiting New Zealand for more than two weeks.

Nights Stayed Cont.

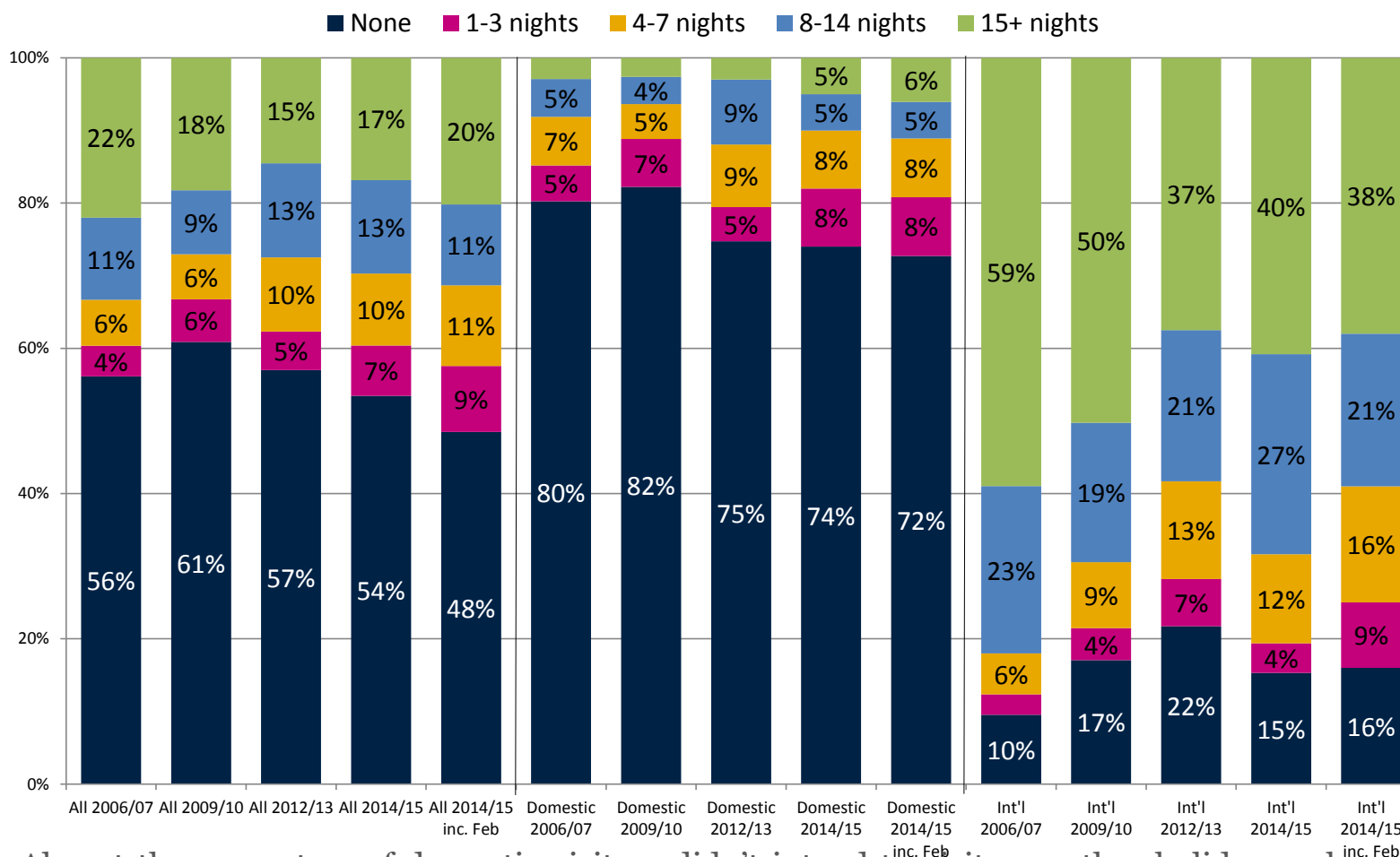
Intended Length of Stay at Current Holiday Park



More than three quarters of international visitors intended to spend three nights or less at the holiday park. Less than one third of domestic visitors intended to do the same (although the proportion rises when February data is included) – domestic visitors are more likely to be ‘stay-put’ visitors.

Nights Stayed Cont.

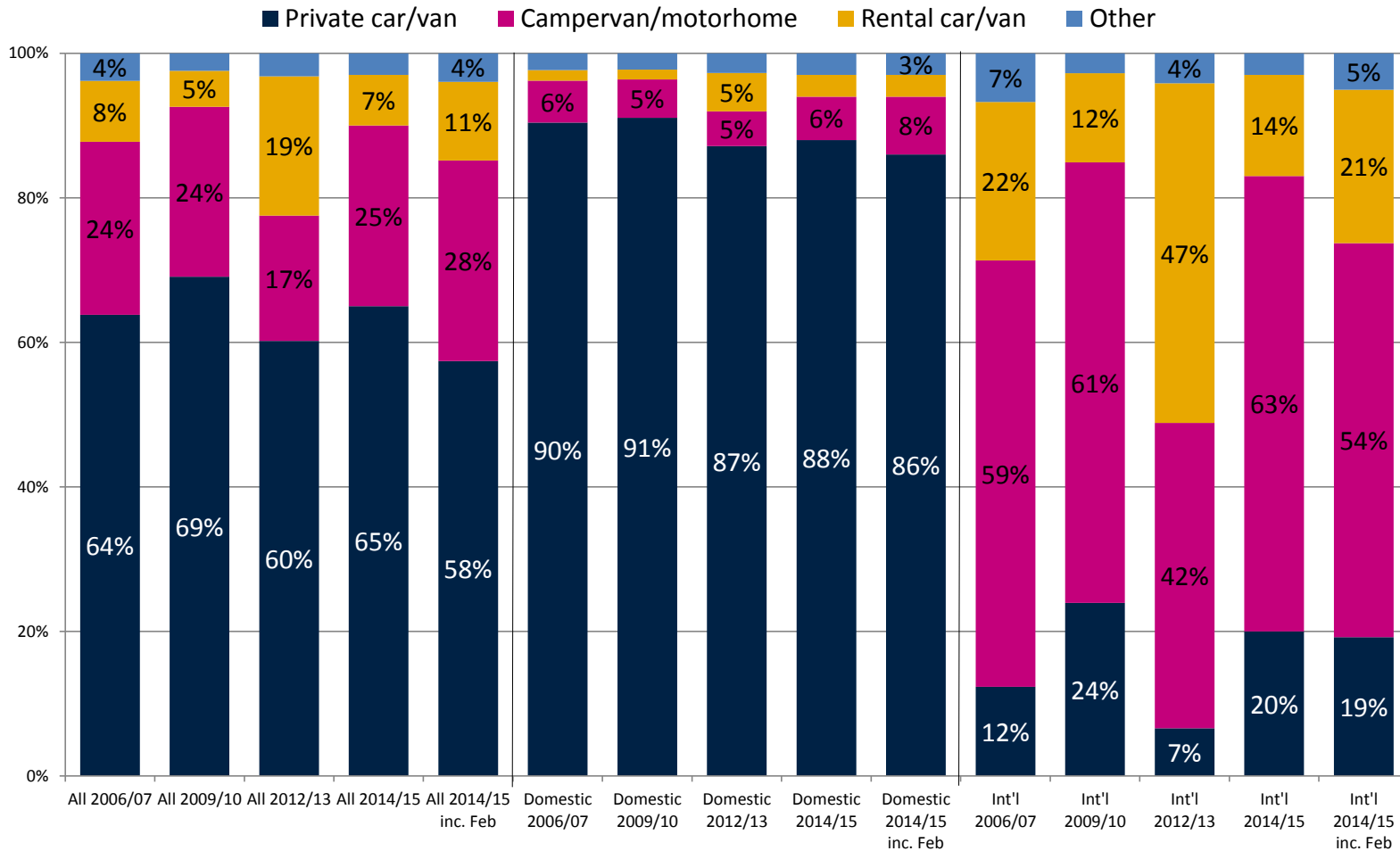
Nights Intend to Spend in Other Holiday Parks (Current Trip)



Almost three quarters of domestic visitors didn't intend to visit any other holiday parks on their trip while more than three quarters of international visitors did intend to visit other holiday parks.

Transport Used

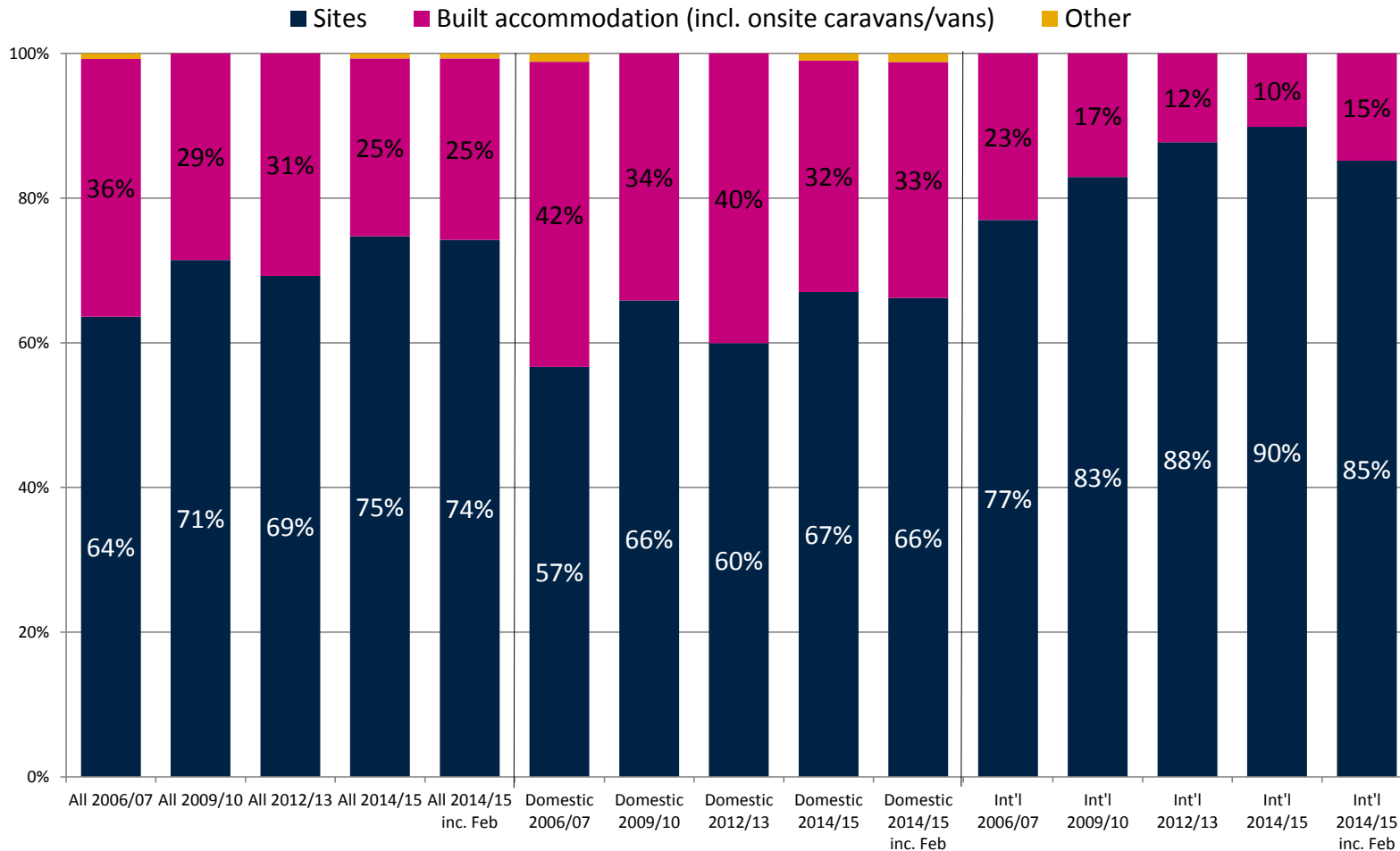
Main Form of Transport Used to Travel to Holiday Park



The majority of domestic visitors continue to travel by private vehicle, while international visitors are most likely to be travelling in a campervan - use of which has lifted after dipping in 2012/13.

Accommodation

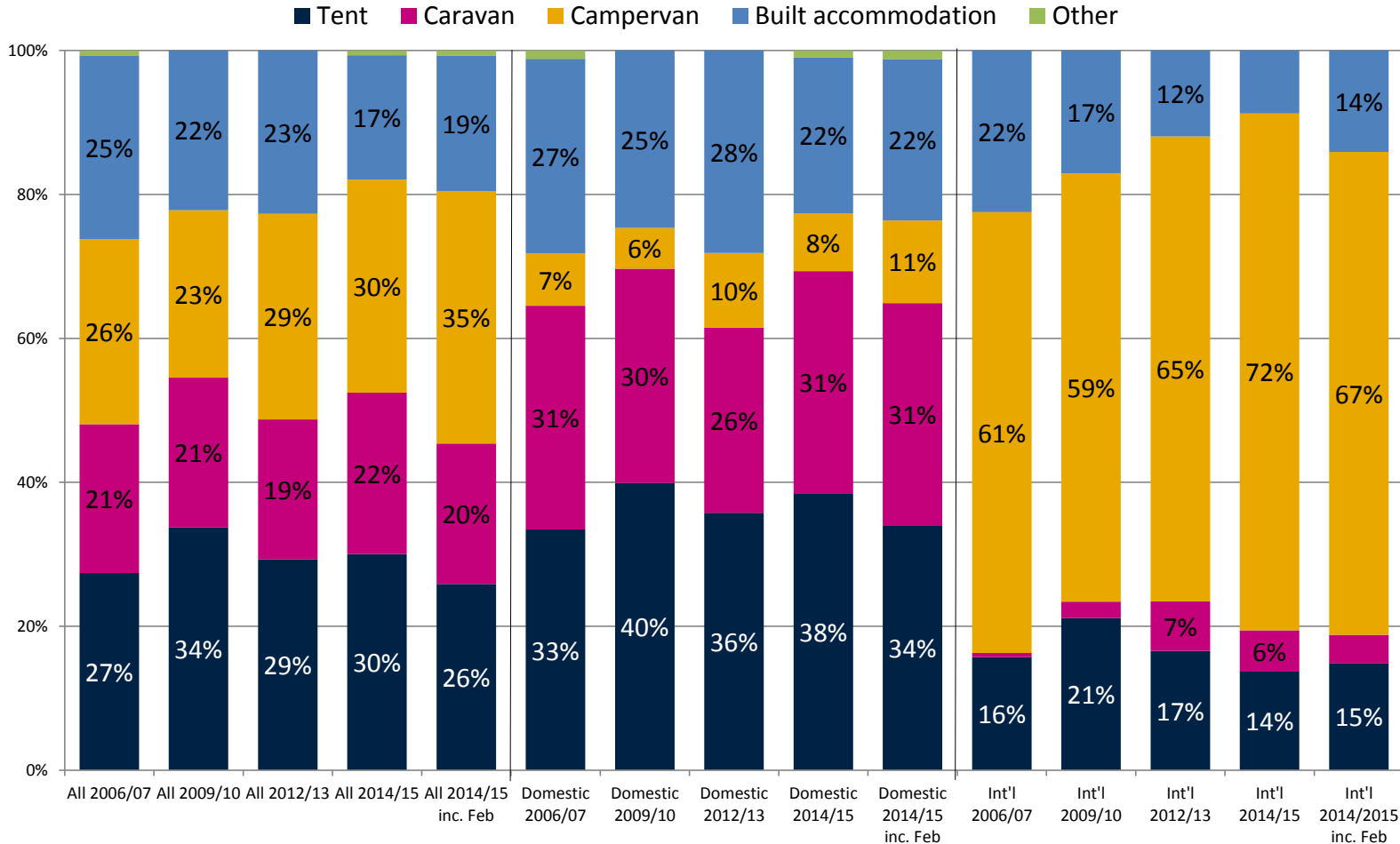
Choice of Accommodation - B.Y.O. v Existing



One third of domestic visitors stayed in built accommodation this season, while international visitors were more likely to 'B.Y.O.' (bring their own accommodation) and the proportion doing so has increased over time.

Accommodation Cont.

Accommodation Type

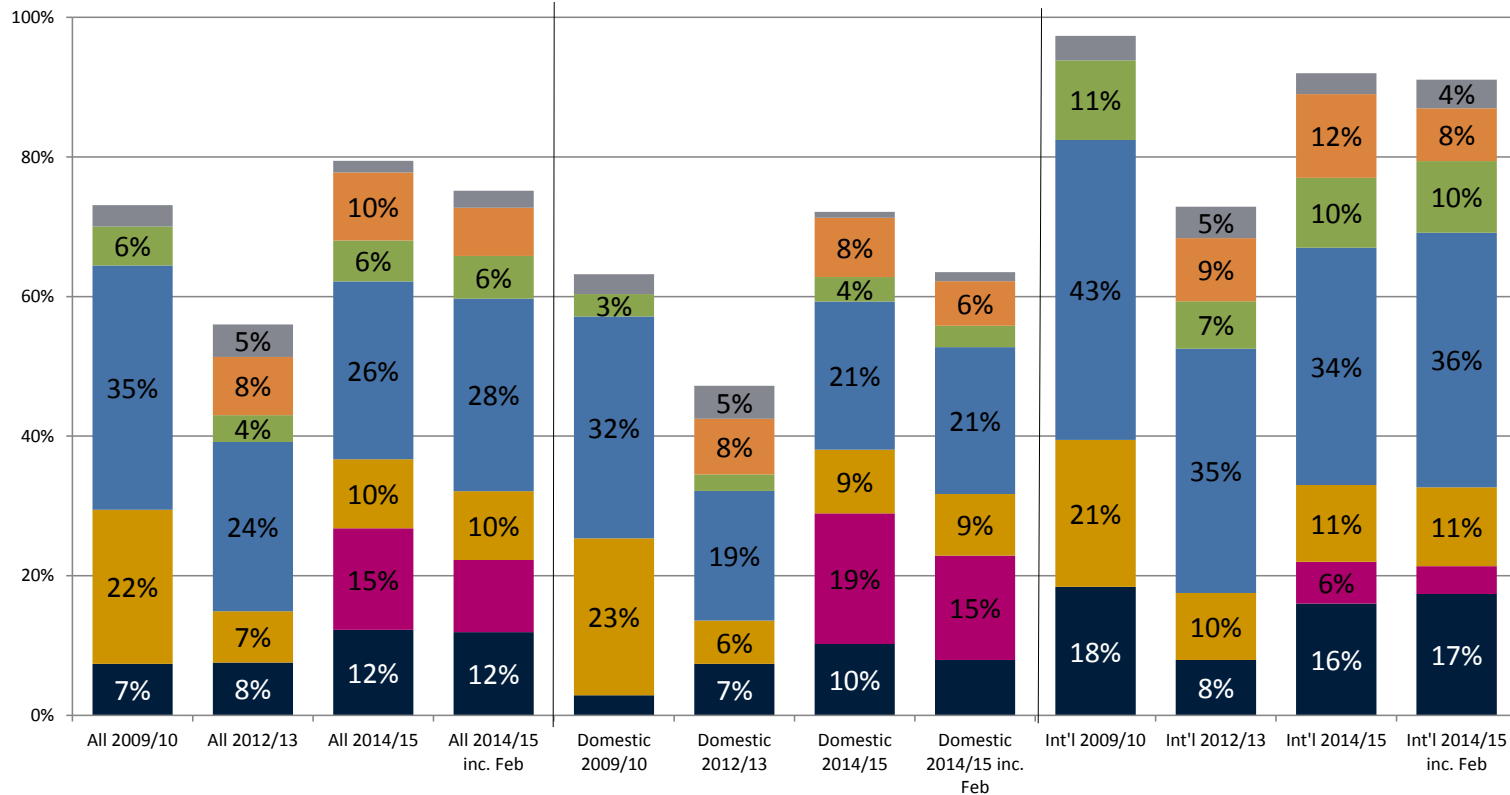


Compared with previous seasons, 2014/15 saw a higher proportion of international visitors choosing to stay in campervans, and a lower proportion stay in tents and built accommodation.

Visitor Info. & Booking Services

Use of Visitor Information/Booking Services at Holiday Parks

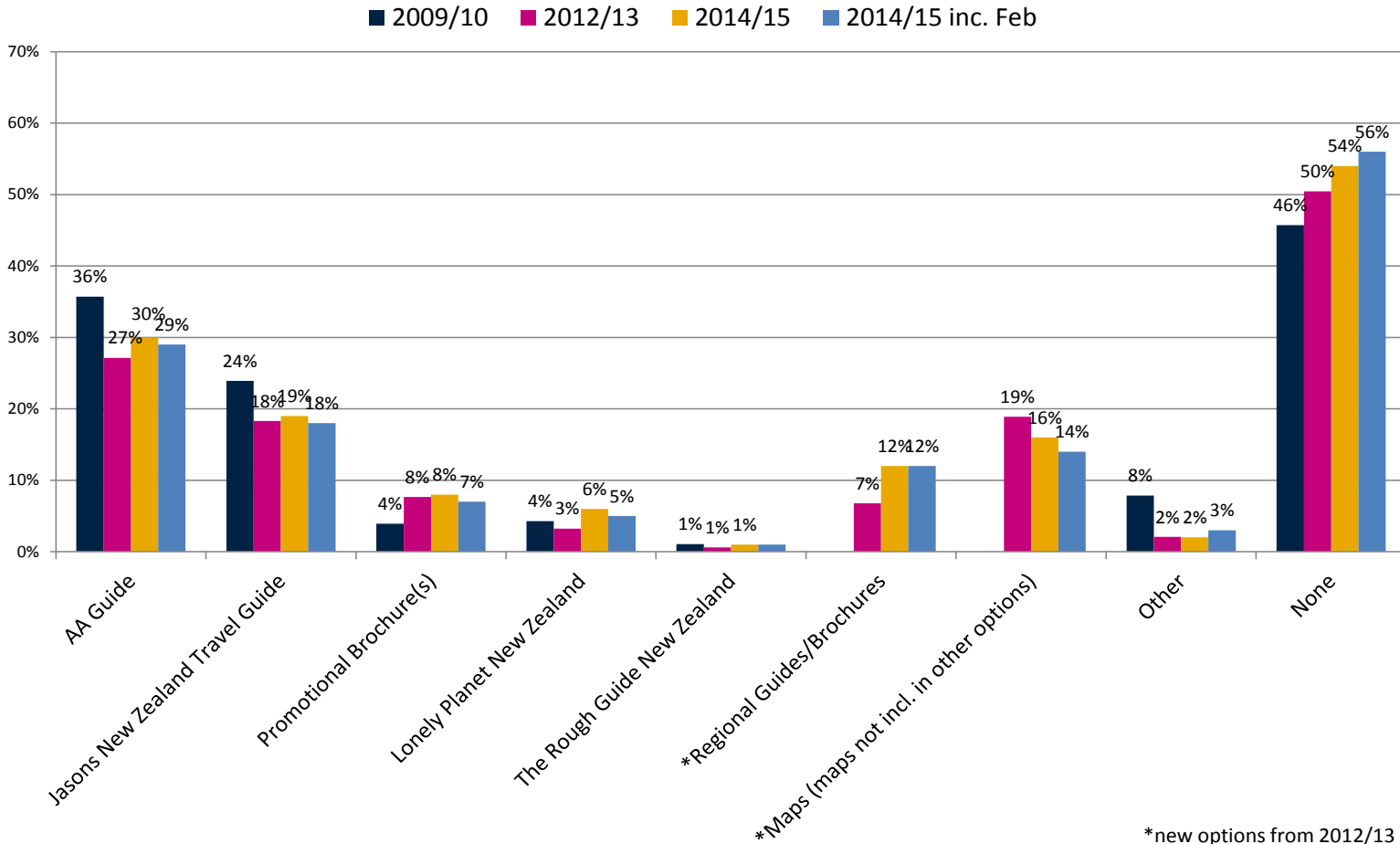
- Onward Accom.
- Activities/Attractions
- Other
- Repeat Accom. (added 14/15)
- Transport
- Restaurants/Cafes
- Events (added 12/13)



Almost one third of domestic visitors (31%) and half of international visitors (46%) used this service at the park of interview. Activities/attractions were most commonly asked about, followed by onward/repeat accommodation.

Visitor Info. & Booking Services Cont.

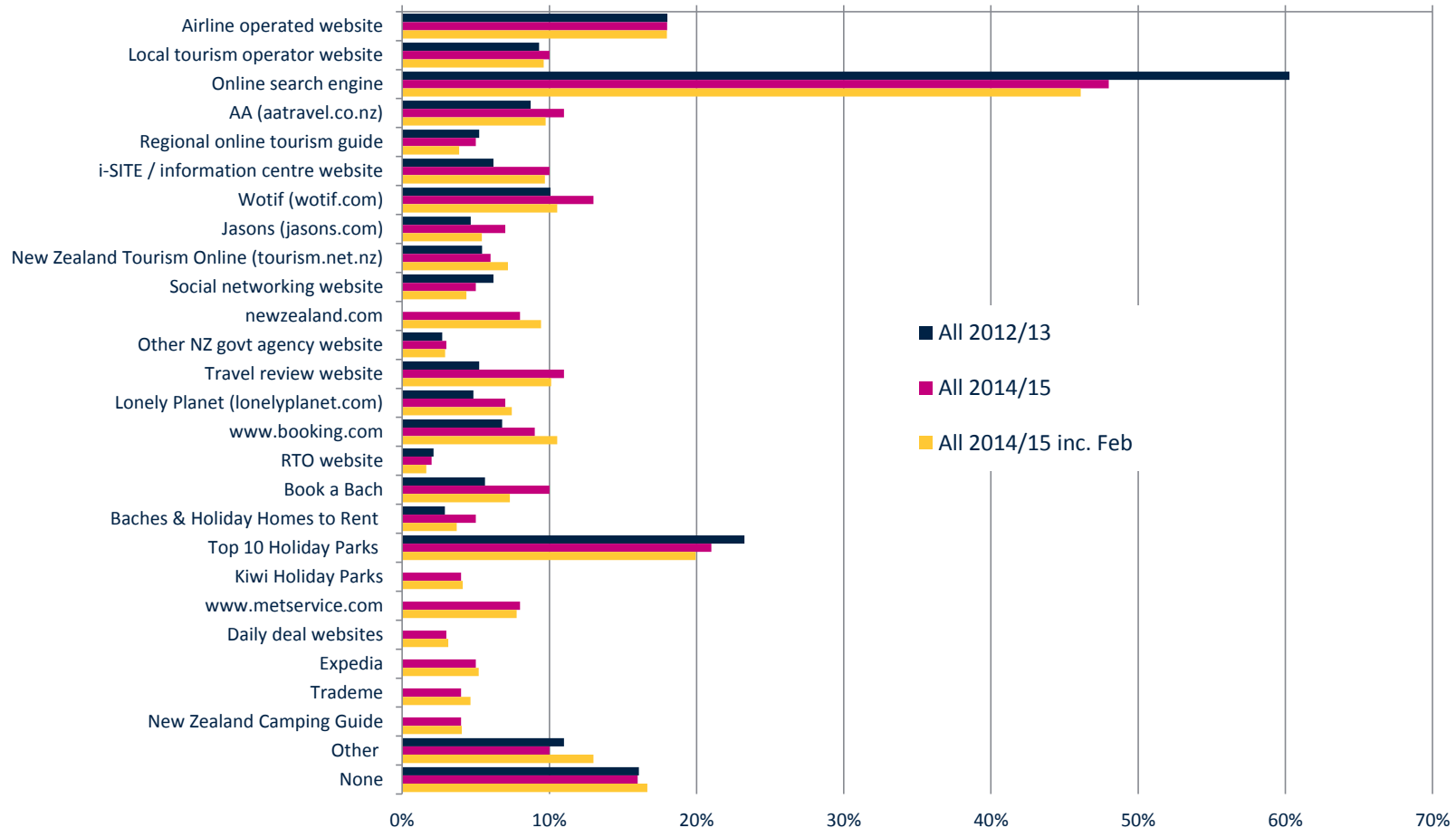
Publications Used to Plan NZ Holidays - Domestic Visitors



The proportion of domestic guests using no **printed** publications to plan their holiday continues to decrease.

Visitor Info & Booking Services Cont.

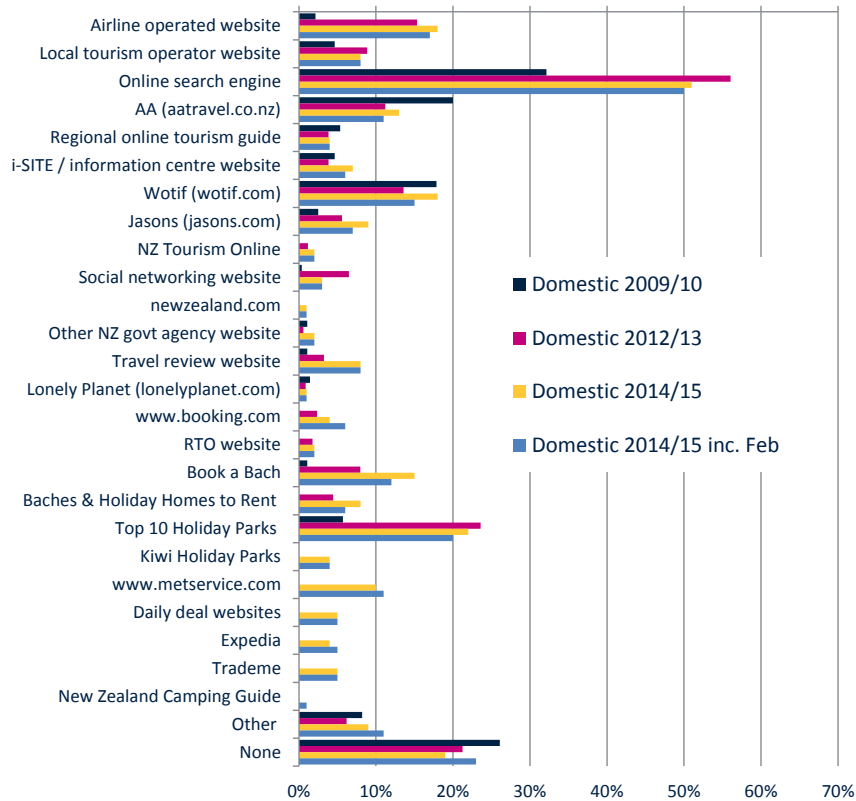
Websites Used to Plan NZ Holidays (All Visitors)



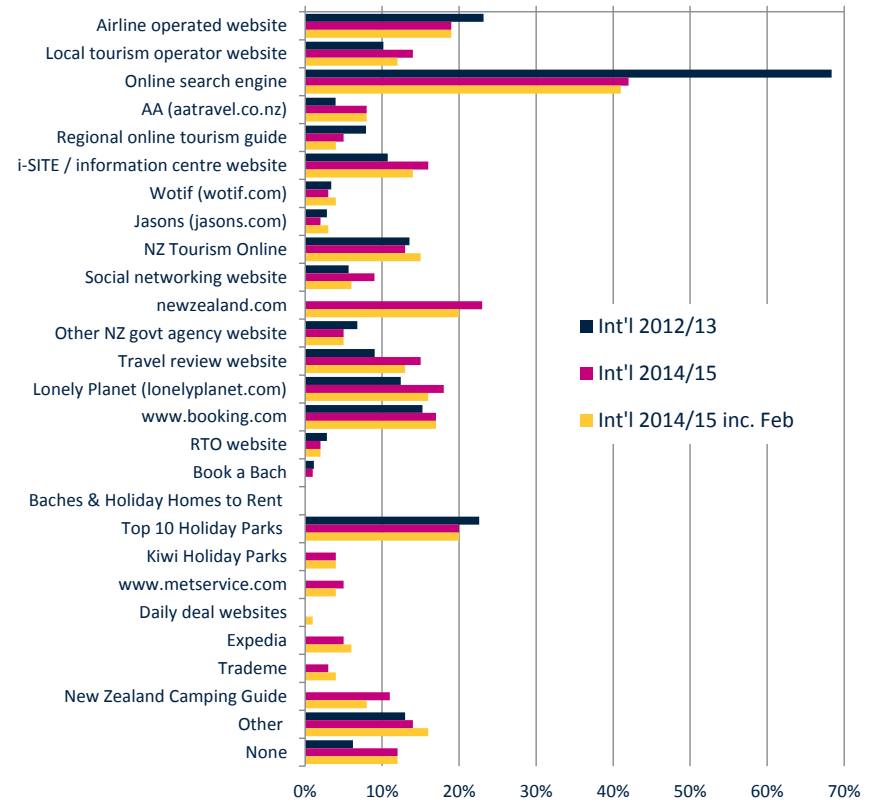
More than 80% of respondents are using the internet to plan their New Zealand holidays. Use of Travel Review websites and ‘Book a Bach’ showed particular increases in the most recent season.

Visitor Info & Booking Services Cont.

Websites Used to Plan NZ Holidays (Domestic)



Websites Used to Plan NZ Holidays (Int'l)



Expenditure

Notes on Expenditure Calculations

Respondents were given the choice of expressing their expenditure for their entire group, or just for themselves personally, depending on the composition of their group and which option was easiest for them. Expenditure was recorded for the last 24 hours only.

If **personal expenditure** was supplied:

1. **Average daily expenditure per person** = Expenditure for the last 24 hours as reported
2. **Average daily expenditure per party** = (Expenditure as reported x no. adults in travel party) + (50% of expenditure as reported x no. children <15yrs in travel party)
3. **Average total trip expenditure per person** = Expenditure as reported x nights away from home on current trip (domestic visitors) OR nights in New Zealand on current trip (international visitors)
4. **Average total trip expenditure per party** = Average daily expenditure per party as calculated in 2) above x nights away from home on current trip (domestic visitors) OR nights in New Zealand on current trip (international visitors)

If **group expenditure** was supplied:

5. **Average daily expenditure per person** = Expenditure for the last 24 hours as reported ÷ no. of people in travel party (where an adult is counted as 1 person and a child aged less than 15 years is counted as 0.5)
6. **Average daily expenditure per party** = Expenditure for the last 24 hours as reported
7. **Average total trip expenditure per person** = Average daily expenditure per person as calculated in 5) above x nights away from home on current trip (domestic visitors) OR nights in New Zealand on current trip (international visitors)
8. **Average total trip expenditure per party** = Expenditure for the last 24 hours as reported x nights away from home on current trip (domestic visitors) OR nights in New Zealand on current trip (international visitors)

•All calculations of total trip expenditure exclude respondents who reported a length of stay exceeding the 95th percentile.

•All 'average' expenditure calculations in 2014/15 include a cap within each category at the 95th percentile to avoid outliers overly influencing results (outliers are given the average spend value). The exception to this is accommodation spend – which is capped at the highest peak season rate by accommodation type as reported in the HAPNZ tariff survey (and averages applied to any values above these).

Average Expenditure

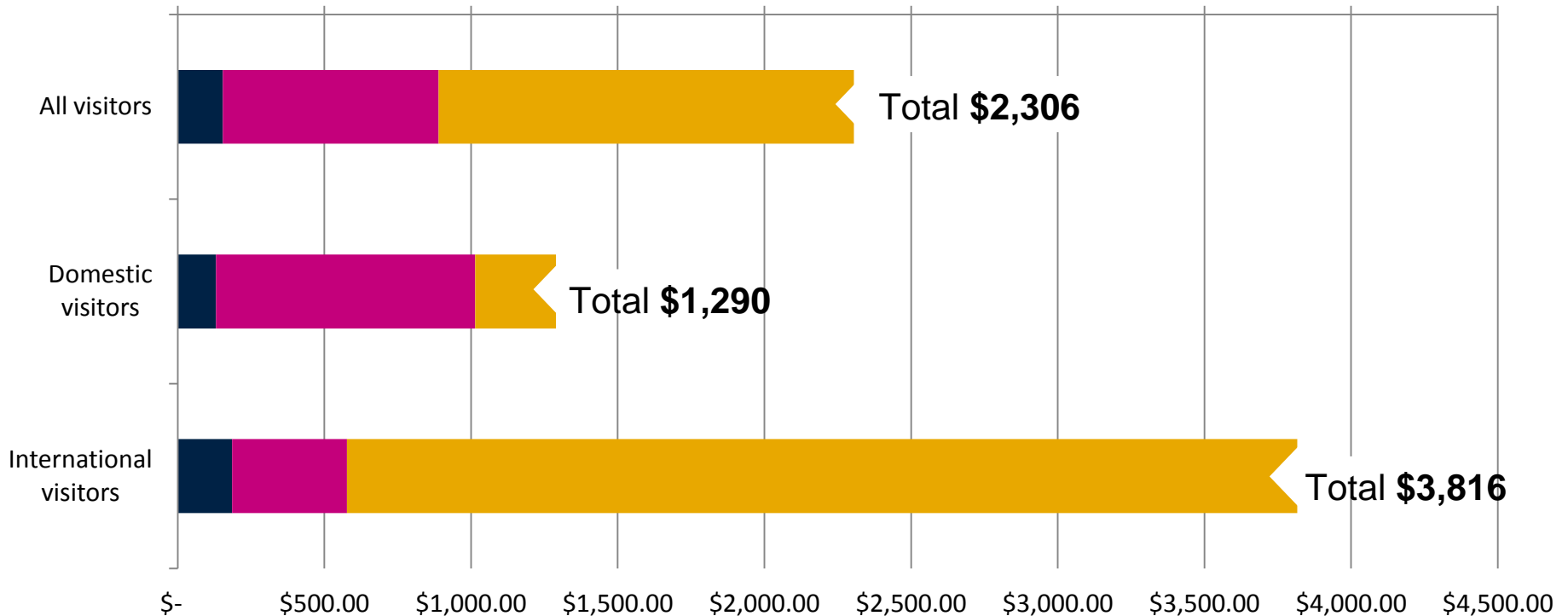
	2006/07	2009/10	2012/13	2014/15	2014/15 inc. Feb
<i>Average daily expenditure per person</i>					
All Visitors	\$95.49	\$98.28	\$113.66	\$155.49	\$153.65
Domestic Visitors	\$74.15	\$74.63	\$87.85	\$135.49	\$130.65
International Visitors	\$150.96	\$161.10	\$180.24	\$194.60	\$184.96
<i>Average daily expenditure per party</i>					
All Visitors	\$371.54	\$373.64	\$380.07	\$489.35	\$446.38
Domestic Visitors	\$315.85	\$306.53	\$307.34	\$474.11	\$426.36
International Visitors	\$479.17	\$511.39	\$541.06	\$519.13	\$473.63
<i>Average total trip expenditure per person*</i>					
All Visitors	\$1,789.33	\$1,875.28	\$1,691.53	\$2,103.53	\$2,305.50
Domestic Visitors	\$819.64	\$853.98	\$934.65	\$1,341.45	\$1,289.78
International Visitors	\$4,305.38	\$4,791.33	\$3,644.24	\$3,736.73	\$3,816.41
<i>Average total trip expenditure per party*</i>					
All Visitors	\$6,961.95	\$7,138.86	\$5,656.38	\$6,278.31	\$6,192.89
Domestic Visitors	\$3,493.02	\$3,539.17	\$3,269.83	\$4,644.30	\$4,123.65
International Visitors	\$13,665.95	\$14,798.77	\$10,939.68	\$9,780.15	\$9,270.94

**Note: Average total trip figures exclude respondents with a length of stay over the 95th percentile*

Average Expenditure cont.

Average Expenditure Per Person Per Trip

- Average daily spend
- Average spend for length of stay at Holiday Park (less 1 day)
- Average Spend for remainder of trip (in other accom.)

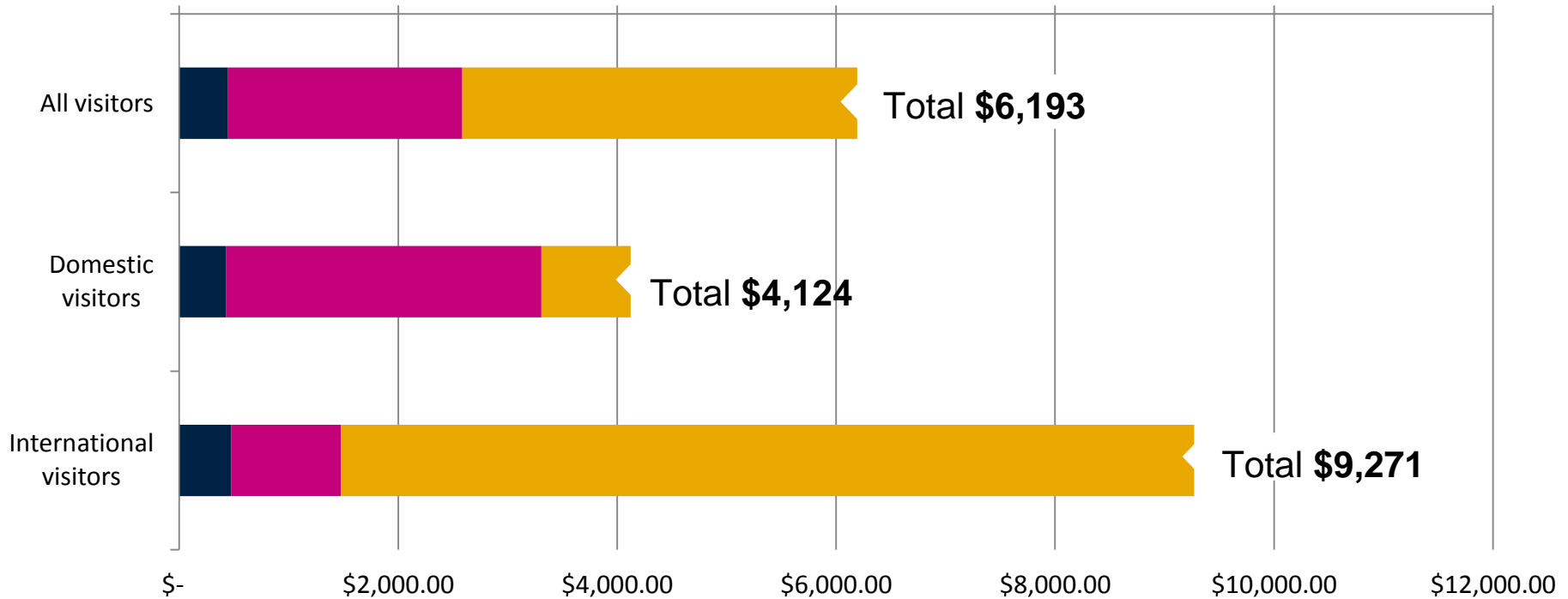


Base: 2014-2015 incl. February

Average Expenditure cont.

Average Expenditure Per Group Per Trip

- Average daily spend
- Average spend for length of stay at Holiday Park (less 1 day)
- Average spend for remainder of trip (in other accom.)



Base: 2014-2015 incl. February

Average Expenditure Cont.

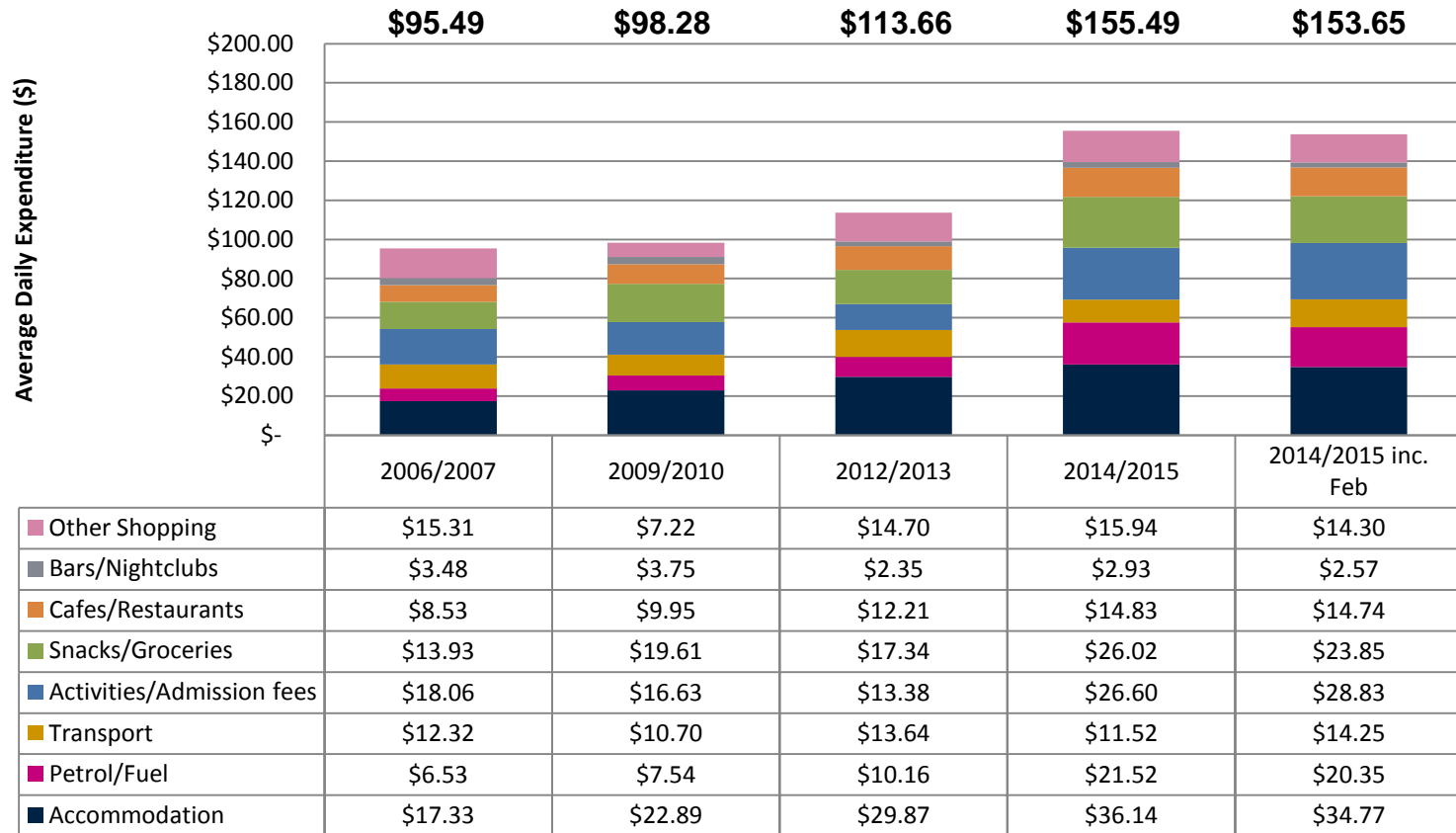
- The expenditure of holiday park visitors varies according to visitor origin, region of visit, and time of year. A range of factors contribute to this including differing trip lengths (on average much longer for international visitors), different styles of travel (it tends to be 'stay-put' for domestic visitors and 'touring' for international visitors), and also differing group sizes (domestic groups tend to be larger and include more children).
- In comparison with expenditure recorded in 2012/13, expenditure in 2014/15 on a per person per day basis is just over a third higher. On a per person per trip basis it is 24% higher. The increase in expenditure this year is partly due to an increase in activity spend – which was impacted in 2012/13 by poor weather in the South Island. There appears also to have been a more general increase in expenditure, which is also evident in MBIE's Regional Tourism Indicator data, and may be reflecting a post-recession environment.
- Excluding accommodation, holiday park guests spent \$119 on average per day (\$67-\$148 depending on the region) – most commonly on activities, snacks/groceries and fuel (note this is somewhat different to a similar study undertaken by BDO in Australia, where activity spend was found to be less significant).
- A number of respondents reported particularly long trip lengths, which has the potential to inflate 'per trip' figures, so respondents over the 95th percentile in terms of their intended trip length have been excluded from 'average per trip' calculations. Likewise, a number of respondents reported particularly high expenditure in some categories, so spend in each category has been capped at the 95th percentile, with spend above this given the average value to ensure figures represent most visitors and are not inflated by the spend of a few.
- International expenditure excludes airfares to/from New Zealand, so when considering 'total trip' expenditure for international visitors, international airfares would be an additional expense. Pre-purchased items such as campervan rental have been included. Where an item such as this was pre-paid, the number of days rental was divided by the total paid to arrive at a 24 hour cost.

Average Daily Expenditure Per Person

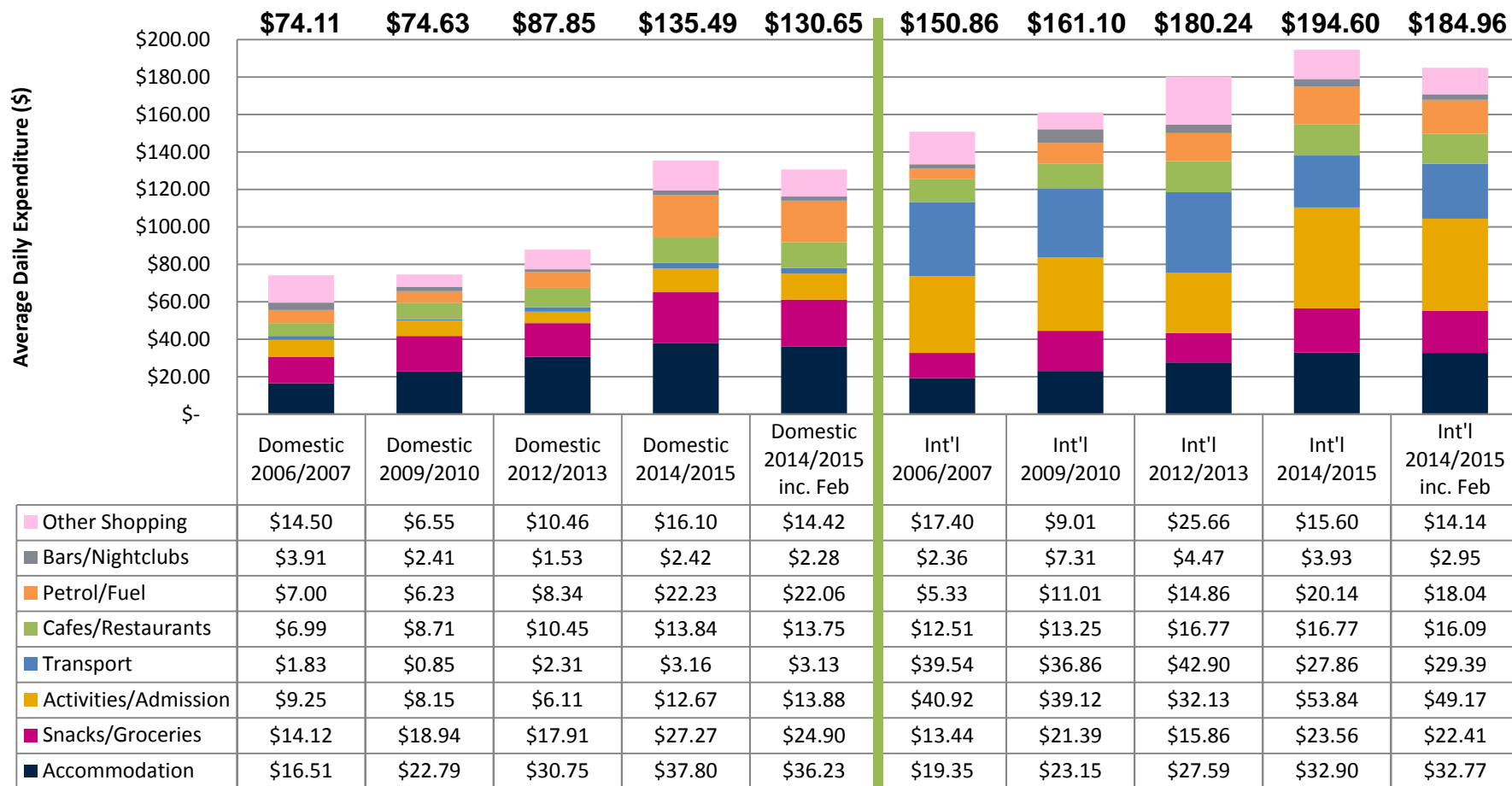
2014/15 inc. Feb

Daily Expenditure Per Person	All \$	All %	Domestic \$	Domestic %	Int'l \$	Int'l %	Western Bay of Plenty	Rotorua Taupo	Christchurch	Queenstown Cromwell
Accommodation	\$34.77	22.6%	\$36.23	27.7%	\$32.77	17.7%	\$34.50	\$36.69	\$34.80	\$33.14
Snacks/Groceries	\$23.85	15.5%	\$24.90	19.1%	\$22.41	12.1%	\$24.73	\$23.85	\$22.89	\$23.98
Activity/Admission Fees	\$28.83	18.8%	\$13.88	10.6%	\$49.17	26.6%	\$2.70	\$42.53	\$19.14	\$50.77
Transport	\$14.25	9.3%	\$3.13	2.4%	\$29.39	15.9%	\$1.96	\$19.21	\$22.02	\$13.44
Cafés/Restaurants	\$14.74	9.6%	\$13.75	10.5%	\$16.09	8.7%	\$10.26	\$16.71	\$13.77	\$18.17
Petrol/Fuel	\$20.35	13.2%	\$22.06	16.9%	\$18.04	9.8%	\$16.43	\$20.25	\$20.36	\$24.23
Bars/Nightclubs	\$2.57	1.7%	\$2.28	1.7%	\$2.95	1.6%	\$1.96	\$2.35	\$1.51	\$4.43
Gambling	\$1.17	0.8%	\$1.91	1.5%	\$0.16	0.1%	\$1.08	\$0.04	\$2.20	\$1.29
Internet Access	\$0.93	0.6%	\$0.44	0.3%	\$1.59	0.9%	\$0.44	\$0.62	\$1.27	\$1.36
Other Expenditure	\$12.20	7.9%	\$12.07	9.2%	\$12.39	6.7%	\$7.35	\$15.40	\$15.53	\$10.43
Total	\$153.65	100%	\$130.65	100%	\$184.96	100%	\$101.40	\$177.64	\$153.49	\$181.24

Average Daily Expenditure Per Person by Category and Season *All Visitors*



Average Daily Expenditure Per Person by Category, Season and Origin



Average Daily Expenditure Per Party

2014/15 inc. Feb

Daily Expenditure Per Party	All \$	All %	Domestic \$	Domestic %	Int'l \$	Int'l %	Western Bay of Plenty	Rotorua Taupo	Christchurch	Queenstown Cromwell
Accommodation	\$105.60	23.7%	\$123.14	28.9%	\$81.73	17.3%	\$122.59	\$115.78	\$88.18	\$97.19
Snacks/Groceries	\$73.55	16.5%	\$86.56	20.3%	\$55.83	11.8%	\$90.18	\$73.47	\$57.20	\$74.22
Activity/Admission Fees	\$82.50	18.5%	\$43.52	10.2%	\$135.56	28.6%	\$11.31	\$120.56	\$54.02	\$143.73
Transport	\$36.58	8.2%	\$7.15	1.7%	\$76.64	16.2%	\$4.11	\$46.34	\$50.15	\$44.70
Cafés/Restaurants	\$41.98	9.4%	\$42.84	10.0%	\$40.82	8.6%	\$33.62	\$50.29	\$35.30	\$48.91
Petrol/Fuel	\$57.63	12.9%	\$68.74	16.1%	\$42.51	9.0%	\$57.36	\$61.63	\$51.35	\$60.46
Bars/Nightclubs	\$7.28	1.6%	\$7.84	1.8%	\$6.53	1.4%	\$8.19	\$5.09	\$4.66	\$11.18
Gambling	\$3.56	0.8%	\$5.81	1.4%	\$0.48	0.1%	\$3.74	\$0.35	\$6.58	\$3.37
Internet Access	\$2.57	0.6%	\$1.68	0.4%	\$3.78	0.8%	\$1.56	\$1.66	\$3.55	\$3.42
Other Expenditure	\$35.13	7.9%	\$39.09	9.2%	\$29.75	6.3%	\$25.04	\$44.73	\$41.12	\$29.57
Total	\$446.38	100%	\$426.36	100%	\$473.63	100%	\$357.70	\$519.90	\$392.12	\$516.75

Average Daily Expenditure Per Party by Category by Season

Daily Expenditure Per Party	2006/07	2009/10	2012/13	2014/15	2014/15 inc. Feb
Accommodation	\$67.43	\$87.02	\$99.88	\$120.80	\$105.60
Snacks/Groceries	\$54.20	\$74.54	\$57.98	\$88.06	\$73.55
Activity/Admission Fees	\$70.28	\$63.21	\$44.74	\$79.76	\$82.50
Transport	\$47.94	\$40.67	\$45.63	\$31.39	\$36.58
Cafés/Restaurants	\$33.18	\$37.84	\$40.84	\$46.21	\$41.98
Petrol/Fuel	\$25.42	\$28.66	\$33.97	\$65.29	\$57.63
Bars/Nightclubs	\$13.54	\$14.25	\$7.86	\$8.75	\$7.28
Gambling	\$3.06	\$2.70	\$1.19	\$4.65	\$3.56
Internet Access	\$0.97	\$1.41	\$2.68	\$2.76	\$2.57
Other Expenditure	\$54.53	\$23.35	\$45.30	\$41.68	\$35.13
Total	\$370.53	\$373.64	\$380.07	\$489.35	\$446.38

Summary of Key Findings

- Respondent profile in terms of age, gender, and origin is similar to that seen previously. However, the proportion of domestic visitors aged 45 plus is growing slightly over time, and the proportion of European visitors has returned this season to previous levels.
- The domestic market appears split between frequent users of a holiday park and first time visitors – with one third having stayed at the park of interview more than 10 times, and 40% on their first visit.
- A lower proportion of children were present in the sample than in previous years and the average group size was also smaller (both particularly among international visitors).
- Length of trip to New Zealand for international visitors was similar to 2012/13 and shorter than in previous years. Further, international visitors were more likely than previously to be combining their holiday park accommodation with other types of accommodation during their visit to New Zealand.
- The proportion of international visitors using campervans has returned to previous levels, after a dip in 2012/13. Use of built accommodation is also declining in the international market, suggesting the campervan option is currently preferred by most.
- Use of Park information/booking services increased this season – assistance with activities/attractions and repeat/onward accommodation was most commonly required. This corresponds with a decrease in the use of printed material for holiday planning.
- Average daily expenditure *per person* has increased since 2012/13 – especially in the domestic market. *Per party* expenditure has decreased slightly in the international market – most likely due to smaller group sizes this season.
- Generally, in both domestic and international markets, expenditure on accommodation, fuel, snacks/groceries, and activities/attractions has increased since 2012/13.

14 March 2016



Fiona Black
Concessions & Consents Manager
Real Journeys

Kia Ora Fiona

The following is information regarding motorhomes and holiday park usage in the Queenstown Regional Tourism Organisation area.

Campervans/Sleepervans

Re the number of campervans. This is very hard to determine but we do know that with THL consolidating a number of brands a couple of years ago that the total fleet size was reduced. THL have now started a new company/product where they utilise privately owned campervans to add to their fleet as "Mighway" vehicles. This is proving popular. Other companies are expanding to meet increased demand.

We estimate the commercial fleet as 5,000 vehicles not including the Mighway private owned ones.

Domestically the NZ Motor Caravan Assn has 60,000 people members and 30,000 vehicles. This is growing at a rapid rate as the population matures and baby boomers choose a campervan over a batch (or crib).

Attached is a (dated) report into the campervan rental sector.

Commercial Holiday Park Guest Nights

This data is from Statistics NZ Commercial Accommodation Survey for the YE 31 Jan 2016 released 10 March 2016.

National

Total Guest nights for New Zealand excluding holiday parks were up 4.9%. In the same period holiday park guest nights were up 5.7% (YE Jan 2016).

Queenstown RTO Region figures

Total Queenstown guest nights excluding holiday parks were up 7% and holiday park guest nights were up 8.7% (YE Jan 16).

Queenstown guest nights in holiday parks have increased from 242,646 in the YE Jan 14 to 318,193 in YE Jan 16.

A copy of the Queenstown commercial accommodation report is attached.

I can quite confidently say that the official Government statistics show that we are gaining market share.

Unit 21, Copperfield, 7-13 Seaview Rd
Paraparaumu Beach, PO Box 394, Paraparaumu 5254, New Zealand
ph +64 4 298 3283 fax +64 4 298 9284 email info@holidayparks.co.nz

Behaviour and Spend of Holiday Park Guests

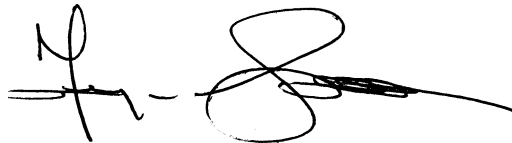
Attached is a report which shows the behaviour and expenditure of holiday park guests. This was last updated in 2014/2015 and we will be updating it again this summer.

The following information shows data calculated for the Queenstown RTO region. This shows that holiday park guests spend 52,977,416 in the region in the YE Jan 2016. Only 17.7% of international visitor spend was on accommodation and 27.7% of domestic visitor spend.

Queenstown	International/Domestic	Guest Nights	Daily Spend	Annual Spend	
Holiday Park Guest Nights YE Jan 2016	66%	210,007	\$184.96	\$38,842,965	International
318,193	34%	108,186	\$130.65	\$14,134,451	Domestic
				\$52,977,416	Total
DAILY EXPENDITURE PER PERSON					
QUEENSTOWN RTO YE Jan 16	Domestic Visitors	International Visitors	Domestic Visitors	International Visitors	Total Expenditure
Accommodation	27.73%	17.72%	\$3,919,565	\$6,881,942	\$10,801,507
Snacks/groceries	19.06%	12.12%	\$2,693,822	\$4,706,265	\$7,400,087
Activity/admission fees	10.62%	26.58%	\$1,501,616	\$10,326,063	\$11,827,679
Transport	2.40%	15.89%	\$338,621	\$6,172,117	\$6,510,738
Cafes/restaurants	10.52%	8.70%	\$1,487,552	\$3,379,019	\$4,866,571
Petrol/fuel	16.88%	9.75%	\$2,386,575	\$3,788,533	\$6,175,108
Bars/nightclubs	1.75%	1.59%	\$246,663	\$619,522	\$866,185
Gambling	1.46%	0.09%	\$206,635	\$33,601	\$240,236
Internet	0.34%	0.86%	\$47,602	\$333,912	\$381,513
Other expenditure	9.24%	6.70%	\$1,305,800	\$2,601,991	\$3,907,792
Total	100.00%	100.00%	14,134,451	38,842,965	\$52,977,416
Source	Statistics New Zealand, Commercial Accommodation Survey, year ending January 2016				
	Angus & Associates, Holiday Park Visitor Expenditure 2014/15, April 2015				

We are happy to provide any other information should it be of assistance.

Yours faithfully



Fergus G Brown
Chief Executive

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Source

Statistics New Zealand, Commercial Accommodation Survey, year ending January 2016
Angus & Associates, Holiday Park Visitor Expenditure 2014/15, April 2015

Understanding the Value Created by Campervan Tourists in New Zealand

Authorship

This document was written by Jennie Coker.

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Executive summary

This report presents an analysis of the spending patterns and tourism behaviour of campervan tourists in New Zealand in 2011. **The analysis is based on a sample of 1,719 responses to an online survey of campervan hirers.** The results have been adjusted to exclude the impact of Rugby World Cup 2011 on expenditure and travel patterns.

The headline results for 2011 are:

- 63,930 campervan hires in calendar year 2011 - 10,220 by New Zealand residents and 53,710 by international visitors.
- Each domestic hire involved 2.1 adult occupants and each international hire involved 2.2 adult occupants.
- A total of 138,124 adults travelled in campervans in 2011 – 21,347 New Zealand residents and 116,776 international visitors.
- Domestic campervan occupants generated 194,453 visitor nights (9.1. nights per person) and international occupants generated 2,302,959 visitor nights (19.7 nights per person).
- Campervan occupants spent \$547.2 million in New Zealand including money paid to Air New Zealand.
- Total expenditure by campervan occupants was \$447.9 million excluding international airfares, comprising \$38.1 million by New Zealand residents and \$447.9 million by international visitors.
- New Zealand residents spent an average of \$1,787 per person (\$196 per night) and international visitors spent \$3,836 excluding international airfares (\$195 per night).

Table 1 Summary of New Zealand campervan sector in 2011

	New Zealand residents	International visitors	Total
Campervan units hired	10,220	53,710	63,930
Adults per campervan	2.1	2.2	2.2
Adult campervan occupants	21,347	116,776	138,124
Average length of trip	9.1	19.7	18.1
Adult visitor nights	194,453	2,302,959	2,497,412
Spend incl. Air NZ international airfares (\$m)	\$38.1	\$509.0	\$547.2
Spend excl. Air NZ international airfares			
Total (\$m)	\$38.1	\$447.9	\$486.1
Per adult campervan occupant	\$1,787	\$3,836	\$3,519
Per adult visitor night	\$196	\$195	\$195

1 Approach

This report is an output of the *Economic Value of Tourism* (EVT) project, a three year research programme funded by the Science and Innovation Group of the Ministry of Business, Innovation and Employment. The purpose of the EVT research is to develop a better understanding of how tourism creates value in the New Zealand economy.

In respect to campervan tourism, the EVT research has the following objectives:

1. Understand how campervan tourists spend money in New Zealand through direct and indirect purchases from New Zealand businesses. This is the demand-side component of the EVT research, which is the primary focus of this paper.
2. Understand how campervan tourism adds value to the New Zealand economy through the direct and indirect business activity it generates in the New Zealand economy. This will be achieved through an analysis of the financial structures of New Zealand businesses that transact with campervan tourists. This is the supply-side component of the EVT research, which falls outside the scope of this paper.

This report presents an analysis of the spending patterns and tourism behaviour of campervan tourists in New Zealand. The analysis is based on data collected in an online survey of campervan hirers between March 2011 and April 2012.

Spend was divided into the following categories:

1. Spend items in New Zealand during the campervan hire period e.g. campervan hire, site fees, fuel, other accommodation, transport, groceries, food/beverages in cafes, bars and restaurants, attractions and activities, and retail during the campervan hire period.
2. Spend items in New Zealand before/after the hire period e.g. accommodation, transport (including domestic airfares), fuel, groceries food/beverages in cafes, bars and restaurants, attractions and activities, and retail.
3. Spend on Air New Zealand international airfares.

1.1 Survey design & distribution

Covec designed and scripted an online survey in SurveyGizmo, a web-based online survey platform selected for its flexibility and ease of use. The survey collected information about length of stay in New Zealand, length of campervan hire period and spending. The question structures were informed by existing tourism surveys including the International Visitor Survey, the Convention Delegate Survey and various major event surveys that Covec has developed and implemented. A link to the online survey was distributed to campervan hirers as part of the post-hire follow-up process.

1.1.1 Sample

A total of 2,002 responses were received to the online survey. Respondents answering “yes” to whether they travelled to New Zealand for the Rugby World Cup were excluded to ensure that the results were representative of a normal year and the remaining 1,719 responses were used in the analysis. Breakdowns of these samples by country group, and comparisons with the population are provided in Table 2.

The population figures are based on actual hireage data supplied by several large campervan companies and estimated hireage activity for the remaining companies. The hireage estimates for the remaining companies were derived by projecting the utilisation rates of the known campervan companies onto the capacities of the unknown campervan companies based on campervan type: non-toilet/shower; 2 berth toilet shower; 4+ berth.

Table 2 Comparison of population and sample shares by country group

Country group*	Population (campervan units hired)	Share	Survey sample	Share
TOTAL	63,930	100%	1,791	100%
New Zealand	10,220	16%	428	24%
All international	53,710	84%	1,363	76%
Australia	18,310	29%	581	32%
United Kingdom	9,090	14%	244	14%
Germany	6,660	10%	84	5%
Netherlands	2,080	3%	51	3%
Other Europe	9,510	15%	159	9%
Americas	3,560	6%	97	5%
Other countries	4,500	7%	147	8%

*Derived from survey response for sample and driver’s license for population

1.1.2 Weighting

The per-adult estimates of expenditure and travel behaviour derived from the survey were weighted up to the population of adult campervan users in calendar year 2011 at the country group level.

The population of adult campervan users was established by combining the campervan hireage data (number of campervan units hired) with average occupancy data (number of occupants per campervan). Estimates of average occupancy were derived from the online survey which asked respondents how many adults they shared their campervan with.

2 Key findings

There were a total of 63,930 campervan hires in calendar year 2011 - 10,220 by New Zealand residents and 53,710 by international visitors. The average length of hire was 8.9 days for domestic hirers and 16.8 days for international hirers, generating 90,820 domestic hire days and 900,360 international hire days.

On average each domestic hire involved 2.1 adult occupants and each international hire involved 2.2 adult occupants. In total 138,124 adults travelled in campervans in 2011 – 21,347 New Zealand residents and 116,776 international visitors.

Table 3 Population of campervan hire days and occupants

Country group	Number of campervan units hired	Average campervan hire days	Total campervan hire days	Average adults per campervan	Total campervan occupants
TOTAL	63,930	15.5	991,180	2.2	138,124
New Zealand	10,220	8.9	90,820	2.1	21,347
All international	53,710	16.8	900,360	2.2	116,776
Australia	18,310	11.9	218,250	2.1	38,448
United Kingdom	9,090	18.3	166,200	2.0	18,515
Germany	6,660	22.3	148,780	2.1	13,875
Netherlands	2080	27.9	58,030	2.0	4,242
Other Europe	9,510	20.3	192,690	2.4	22,908
Americas	3,560	14.2	50,520	2.2	7,707
Other countries	4,500	14.6	65,890	2.5	11,082

2.1 Length of stay characteristics of campervan occupants

On average a domestic campervan hire lasted 7.9 nights and an international campervan hire lasted 15.8 nights¹. Before/after the campervan hire period domestic occupants spent a further 1.2 nights away from home while international occupants stayed a further 4.0 nights in New Zealand.

Domestic occupants therefore had an average trip length of 9.1 nights which equates to a total of 194,453 domestic visitor nights in 2011, and international occupants had an average length of stay in New Zealand of 19.7 nights which equates to a total of 2,302,959 international visitor nights.

¹ This assumes that the average number of nights covered by the campervan hire period was one less than the average number of hire days.

Table 4 Length of stay characteristics of campervan occupants in 2011

Country group	Average length of trip (nights)		
	Campervan hire*	Before/after campervan hire	Total trip
New Zealand	7.9	1.2	9.1
All international	15.8	4.0	19.7
Australia	10.9	2.8	13.7
United Kingdom	17.3	6.8	24.1
Germany	21.3	3.0	24.3
Netherlands	26.9	3.9	30.8
Other Europe	19.3	4.0	23.3
Americas	13.2	4.6	17.8
Other countries	13.6	4.0	17.6

*The average number of hire nights is assumed to be one less than the average number of hire days

Table 5 Visitor nights generated by campervan occupants in 2011

Country group	Total visitor nights		
	During campervan hire	Before/after campervan hire	Total trip
TOTAL	2,003,366	488,269	2,491,635
New Zealand	168,356	26,097	194,453
All international	1,840,787	462,172	2,302,959
Australia	419,840	107,336	527,176
United Kingdom	320,015	125,512	445,527
Germany	296,083	41,011	337,094
Netherlands	114,094	16,717	130,811
Other Europe	441,245	92,063	533,308
Americas	101,666	35,358	137,024
Other countries	151,178	44,176	195,354

2.2 Spend by campervan occupants excl. international airfares

Domestic campervan occupants spent a total of \$38.1 million outside their home regions in 2011 inclusive of GST, and international campervan occupants spent a total of \$447.9 million in New Zealand excluding expenditure on international airfares (see Table 6).

On average domestic campervan occupants spent a total of \$1,787 over their entire trip, a per night equivalent of \$196. International campervan occupants spent a total of \$3,836 per adult in New Zealand excluding international airfares, a per night equivalent of \$195 over the entire trip.

Table 6 Total spend in New Zealand by campervan occupants excluding international airfares

Country group	Total spend in New Zealand (\$NZm incl. GST)			Spend per adult	Spend per adult night
	During campervan hire	Before/after campervan hire	Total		
TOTAL	\$407.2	\$78.9	\$486.1	\$3,519	\$195
New Zealand	\$32.6	\$5.5	\$38.1	\$1,787	\$196
All international	\$374.6	\$73.3	\$447.9	\$3,836	\$195
Australia	\$93.5	\$19.5	\$113.0	\$2,939	\$214
United Kingdom	\$64.4	\$16.7	\$81.1	\$4,380	\$182
Germany	\$52.4	\$8.5	\$61.0	\$4,393	\$181
Netherlands	\$20.4	\$2.2	\$22.6	\$5,330	\$173
Other Europe	\$86.4	\$11.5	\$97.9	\$4,274	\$184
Americas	\$21.5	\$6.5	\$28.0	\$3,628	\$204
Other countries	\$38.5	\$8.4	\$46.9	\$4,230	\$240

2.2.1 Spend during the campervan hire period

On average, each domestic campervan occupant spent \$1,527 during the hire period and each international campervan occupant spent \$3,208. This equates to \$194 per night for domestic occupants and \$204 per night for international occupants, including campervan hire.

Table 7 Spend by campervan occupants during the campervan hire period in 2011

	Total spend in NZ (\$NZm, incl. GST)			Spend per adult	Spend per adult night
	Campervan hire*	Other ^	Total		
TOTAL	\$167.5	\$239.7	\$407.2	\$2,948	\$203
New Zealand	\$14.4	\$18.2	\$32.6	\$1,527	\$194
All international	\$153.1	\$221.5	\$374.6	\$3,208	\$204
Australia	\$35.7	\$57.8	\$93.5	\$2,432	\$223
United Kingdom	\$29.5	\$34.9	\$64.4	\$3,479	\$201
Germany	\$23.8	\$28.6	\$52.4	\$3,779	\$177
Netherlands	\$10.3	\$10.2	\$20.4	\$4,815	\$179
Other Europe	\$32.9	\$53.5	\$86.4	\$3,771	\$196
Americas	\$8.4	\$13.1	\$21.5	\$2,790	\$212
Other countries	\$12.5	\$26.0	\$38.5	\$3,470	\$254

*sourced from campervan operator financial data (excludes commissions paid to foreign businesses)

^See Appendices for more detail

2.2.2 Spend in New Zealand before/after the campervan hire period

On average, domestic campervan occupants spent a total of \$260 (including domestic airfares) before/after the campervan hire period during their trip away from their home region, a per night equivalent of \$213. International campervan occupants spent an average of \$628 in New Zealand before/after the campervan hire period, a per night equivalent of \$159.

Table 8 Spend by campervan occupants before/after the campervan hire period in 2011

	Total spend (\$NZm)^	Spend per adult	Spend per adult night
TOTAL	\$78.9	\$571	\$162
New Zealand	\$5.5	\$260	\$213
All international	\$73.3	\$628	\$159
Australia	\$19.5	\$508	\$182
United Kingdom	\$16.7	\$901	\$133
Germany	\$8.5	\$615	\$208
Netherlands	\$2.2	\$515	\$131
Other Europe	\$11.5	\$503	\$125
Americas	\$6.5	\$837	\$182
Other countries	\$8.4	\$759	\$191

^See Appendices for more detail

2.3 Spend by campervan occupants on Air NZ international airfares

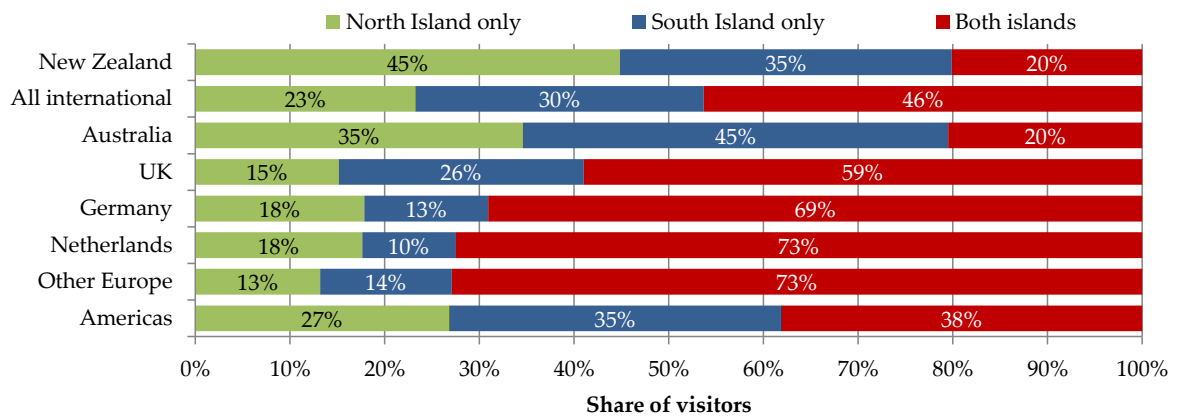
Around 42,300 campervan occupants from overseas (36%) used Air New Zealand as their international carrier. In total these visitors purchased approximately \$61 million of international airfares from Air New Zealand, with each spending an average of \$1,444. Australians travelling on Air New Zealand spent an average of \$614 on international airfares while long-haul travellers spent an average of \$1,861. Some long-haul travellers visited Australia or the Pacific Islands before or after New Zealand and therefore only flew with Air New Zealand in one direction.

2.4 Travel characteristics of campervan occupants

During the campervan hire period domestic campervan occupants spent 75% of their nights in paid sites while international occupants spent 89% of their nights in paid sites. "Unpaid sites" includes nights spent parked on the property of friends or relatives.

Weighted by country, 46% of international respondents visited both the North and South islands during their visit to New Zealand while 20% of domestic respondents visited both islands during their trip away from their home region (see Figure 1).

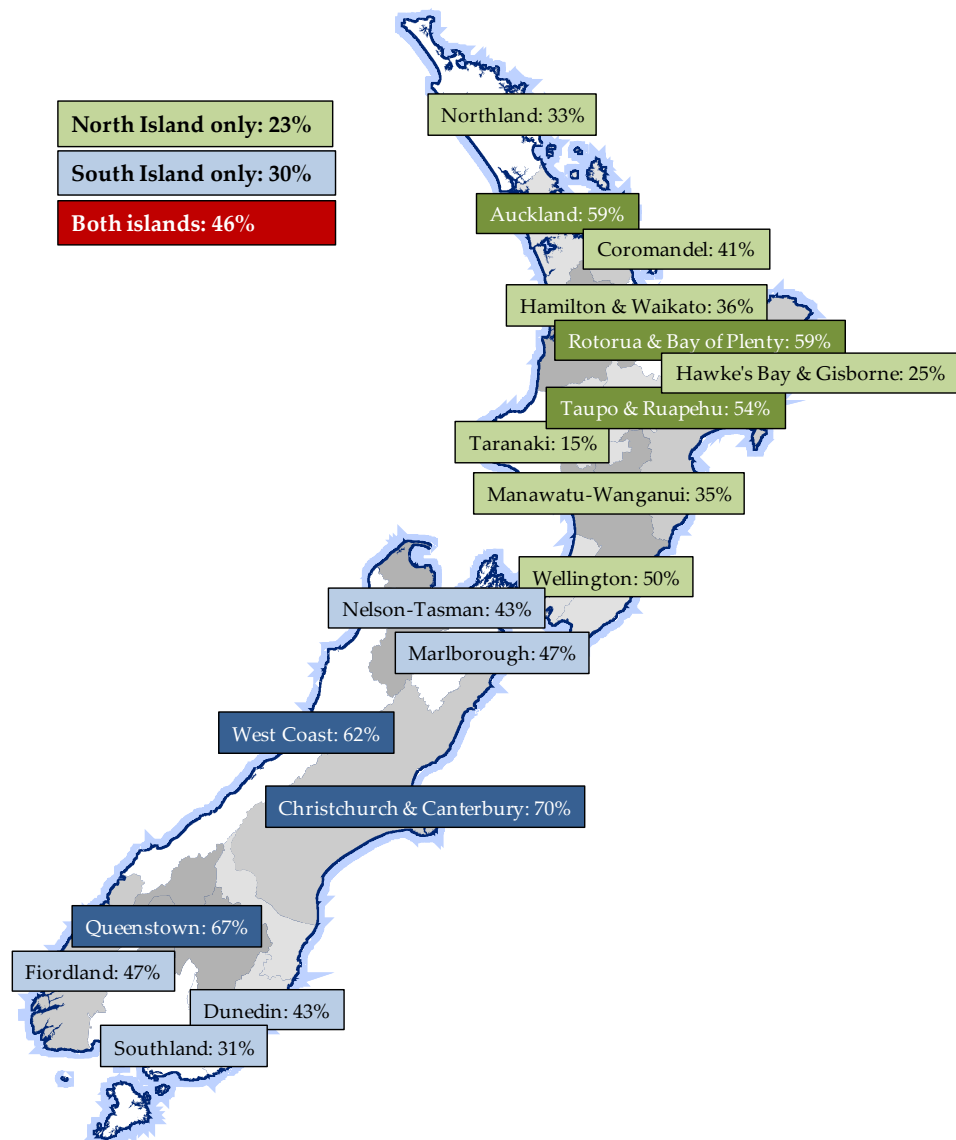
Figure 1: Geographic spread of campervan hirers



2.5 Regional dispersion of international campervan occupants

The region most visited by international campervan occupants is Canterbury, with 70% visiting this region. All New Zealand regions were visited by more than a quarter of international campervan occupants except Taranaki, which was visited by only 15% (see Figure 2).

Figure 2: Share of international campervan occupants visiting each region during their campervan trip



Appendices

Appendix 1 Spend per adult by campervan occupants during the campervan hire period in 2011 (inclusive of GST)

Country group	Van Hire*	Site fees	Accom	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total
New Zealand	\$675	\$125	\$14	\$35	\$178	\$145	\$134	\$135	\$81	\$5	\$1,527
All international	\$1,311	\$283	\$40	\$93	\$276	\$304	\$240	\$442	\$204	\$13	\$3,208
Australia	\$929	\$203	\$30	\$42	\$217	\$223	\$210	\$369	\$194	\$16	\$2,432
United Kingdom	\$1,594	\$302	\$40	\$116	\$271	\$281	\$256	\$451	\$159	\$7	\$3,479
Germany	\$1,718	\$343	\$38	\$120	\$363	\$406	\$216	\$370	\$172	\$32	\$3,779
Netherlands	\$2,418	\$453	\$33	\$146	\$356	\$438	\$239	\$513	\$209	\$9	\$4,815
Other Europe	\$1,436	\$341	\$48	\$148	\$321	\$386	\$305	\$542	\$243	\$2	\$3,771
Americas	\$1,095	\$231	\$62	\$88	\$253	\$247	\$212	\$399	\$201	\$2	\$2,790
Other countries	\$1,127	\$332	\$57	\$70	\$294	\$339	\$265	\$646	\$322	\$19	\$3,470

*sourced from campervan rental company financial data (excludes commissions paid to foreign businesses)

Appendix 2 Spend per adult by campervan occupants before/after the campervan hire period in 2011 (inclusive of GST)

Country group	Accom	Domestic Airfares	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total excl. airfares	Air NZ fares	Total incl. airfares
New Zealand	\$43	\$99	\$33	\$17	\$16	\$23	\$15	\$14	\$1	\$260	n/a	\$260
All international	\$206	\$79	\$92	\$22	\$34	\$83	\$60	\$47	\$5	\$628	\$523	\$1,151
Australia	\$165	\$44	\$66	\$16	\$30	\$73	\$68	\$43	\$2	\$508	\$223	\$731
United Kingdom	\$316	\$66	\$170	\$39	\$48	\$131	\$80	\$48	\$2	\$901	\$783	\$1,684
Germany	\$205	\$134	\$80	\$12	\$30	\$62	\$28	\$33	\$30	\$615	\$603	\$1,218
Netherlands	\$143	\$120	\$59	\$9	\$34	\$69	\$35	\$46	\$0	\$515	\$395	\$909
Other Europe	\$170	\$61	\$78	\$16	\$23	\$72	\$41	\$42	\$0	\$503	\$574	\$1,078
Americas	\$258	\$227	\$84	\$31	\$30	\$95	\$61	\$50	\$0	\$837	\$1,310	\$2,147
Other countries	\$230	\$75	\$111	\$35	\$53	\$87	\$82	\$85	\$2	\$759	\$428	\$1,187

Appendix 3 Spend per adult by campervan occupants throughout the trip in 2011 (inclusive of GST)

Country group	Van Hire*	Site fees	Accom	Domestic Airfares	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total excl. airfares	Air NZ fares	Total incl. airfares
New Zealand	\$675	\$125	\$56	\$99	\$68	\$195	\$161	\$157	\$150	\$95	\$6	\$1,787	n/a	\$1,787
All international	\$1,311	\$283	\$246	\$79	\$185	\$298	\$338	\$324	\$502	\$251	\$18	\$3,836	\$523	\$4,359
Australia	\$929	\$203	\$195	\$44	\$108	\$232	\$253	\$282	\$438	\$237	\$18	\$2,939	\$223	\$3,162
United Kingdom	\$1,594	\$302	\$356	\$66	\$286	\$310	\$330	\$387	\$532	\$207	\$9	\$4,380	\$783	\$5,163
Germany	\$1,718	\$343	\$243	\$134	\$200	\$375	\$436	\$279	\$398	\$205	\$62	\$4,393	\$603	\$4,996
Netherlands	\$2,418	\$453	\$176	\$120	\$206	\$365	\$472	\$308	\$548	\$255	\$9	\$5,330	\$395	\$5,725
Other Europe	\$1,436	\$341	\$218	\$61	\$225	\$336	\$409	\$377	\$583	\$285	\$2	\$4,274	\$574	\$4,849
Americas	\$1,095	\$231	\$319	\$227	\$173	\$285	\$277	\$307	\$460	\$251	\$2	\$3,628	\$1,310	\$4,938
Other countries	\$1,127	\$332	\$287	\$75	\$181	\$329	\$391	\$352	\$728	\$406	\$21	\$4,230	\$428	\$4,657

*sourced from campervan rental company financial data (excludes commissions paid to foreign businesses)

Appendix 4 Total spend by campervan occupants throughout the trip in 2011 (\$m inclusive of GST)

Country group	Van Hire*	Site fees	Accom	Domestic Airfares	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total excl. airfares	Air NZ fares	Total incl. airfares
TOTAL	\$167.5	\$35.7	\$30.0	\$11.4	\$23.1	\$38.9	\$42.9	\$41.1	\$61.8	\$31.4	\$2.2	\$486.1	\$61.1	\$547.2
New Zealand	\$14.4	\$2.7	\$1.2	\$2.1	\$1.4	\$4.2	\$3.4	\$3.3	\$3.2	\$2.0	\$0.1	\$38.1	n/a	\$38.1
All international	\$153.1	\$33.1	\$28.8	\$9.3	\$21.6	\$34.8	\$39.5	\$37.8	\$58.6	\$29.3	\$2.1	\$447.9	\$61.1	\$509.0
Australia	\$35.7	\$7.8	\$7.5	\$1.7	\$4.1	\$8.9	\$9.7	\$10.8	\$16.8	\$9.1	\$0.7	\$113.0	\$8.6	\$121.6
United Kingdom	\$29.5	\$5.6	\$6.6	\$1.2	\$5.3	\$5.7	\$6.1	\$7.2	\$9.8	\$3.8	\$0.2	\$81.1	\$14.5	\$95.6
Germany	\$23.8	\$4.8	\$3.4	\$1.9	\$2.8	\$5.2	\$6.1	\$3.9	\$5.5	\$2.8	\$0.9	\$61.0	\$8.4	\$69.3
Netherlands	\$10.3	\$1.9	\$0.7	\$0.5	\$0.9	\$1.5	\$2.0	\$1.3	\$2.3	\$1.1	\$0.0	\$22.6	\$1.7	\$24.3
Other Europe	\$32.9	\$7.8	\$5.0	\$1.4	\$5.2	\$7.7	\$9.4	\$8.6	\$13.4	\$6.5	\$0.0	\$97.9	\$13.2	\$111.1
Americas	\$8.4	\$1.8	\$2.5	\$1.8	\$1.3	\$2.2	\$2.1	\$2.4	\$3.5	\$1.9	\$0.0	\$28.0	\$10.1	\$38.1
Other countries	\$12.5	\$3.7	\$3.2	\$0.8	\$2.0	\$3.7	\$4.3	\$3.9	\$8.1	\$4.5	\$0.2	\$46.9	\$4.7	\$51.6

*sourced from campervan rental company financial data (excludes commissions paid to foreign businesses)