



Te Kahui Tupua Visitor Survey – Ruapehu Region

(Results to 11th June 2009)



Report for

Te Kahui Tupua

July 2009

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Introduction

Background

This report outlines results of the Te Kahui Tupua Visitor Survey undertaken in the Ruapehu Region in the dates between 3rd March and 11th June 2009.

The survey gathers information concerning visitor motivations and expectations, travel planning and patterns of visitor activity and satisfaction.

The Te Kahui Tupua Visitor Survey was developed by Angus & Associates and carried out in the three Te Kahui Tupua regions – Rangitikei, Wanganui and Ruapehu – in cooperation and consultation with Te Kahui Tupua.

Results of the Te Kahui Tupua Visitor Survey will be used by Te Kahui Tupua regions to guide decision-making and, potentially, to track changes in the regions over time. This enables the RTO and its local tourism partners to monitor trends in performance and to identify and address critical destination management and destination marketing issues as they arise.

Research Methodology

This report includes the results of research conducted with 597 visitors to the Ruapehu Region - a robust sample on which to base analysis. Participants were recruited on random days by field-staff working in various sites in the region and invited to complete an online survey. At each site and on each field day, standard random sampling procedures were used (for example, selecting every *n*th person who passed a given point, selecting a person in a group who last had a birthday) to maximise the representativeness of the sample.

Survey sites were selected in consultation with Te Kahui Tupua, and included a combination of Department of Conservation and I-Site visitor centres, cafes, roadside locations and at the beginning/end of the Tongariro Crossing.

To qualify to take part in the survey, respondents must have: -

- been at least 15 years of age;
- lived outside of the region in which they were interviewed; and
- have stayed or be intending to stay in that region for at least one night at the time of participating in the survey.

No quotas were set when recruiting participants, so the demographic breakdown of survey respondents (as well as other information) is largely representative of actual visitors to the Ruapehu Region.

Respondents participated in the Te Kahui Tupua Visitor Survey by completing an online survey which they were sent after providing their email addresses to recruiters in the region.

For general information about the Te Kahui Tupua Visitor Survey, please contact: -

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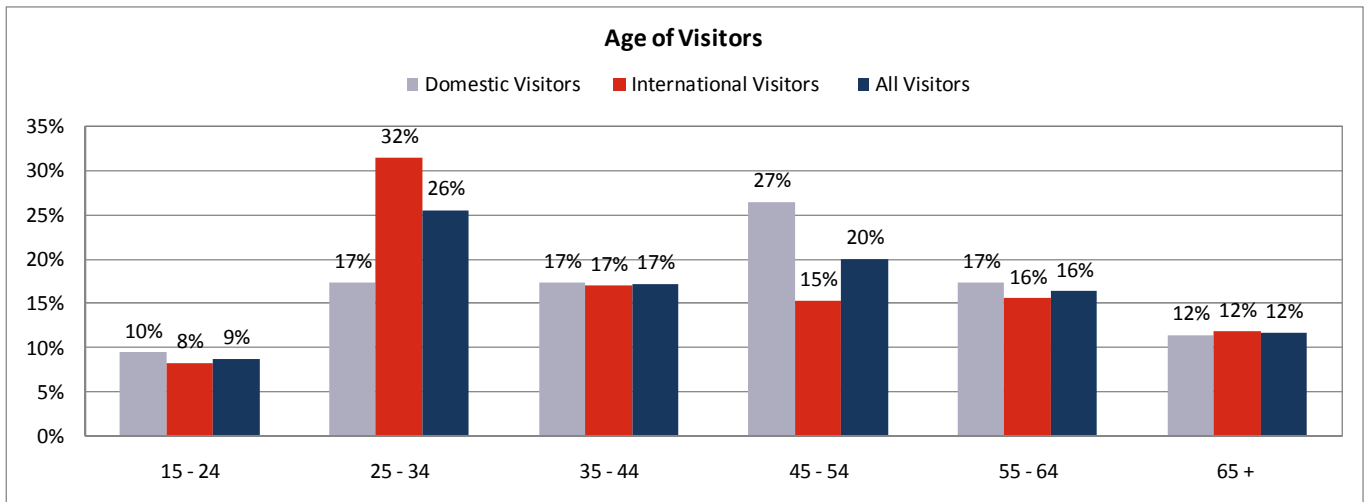
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Highlights

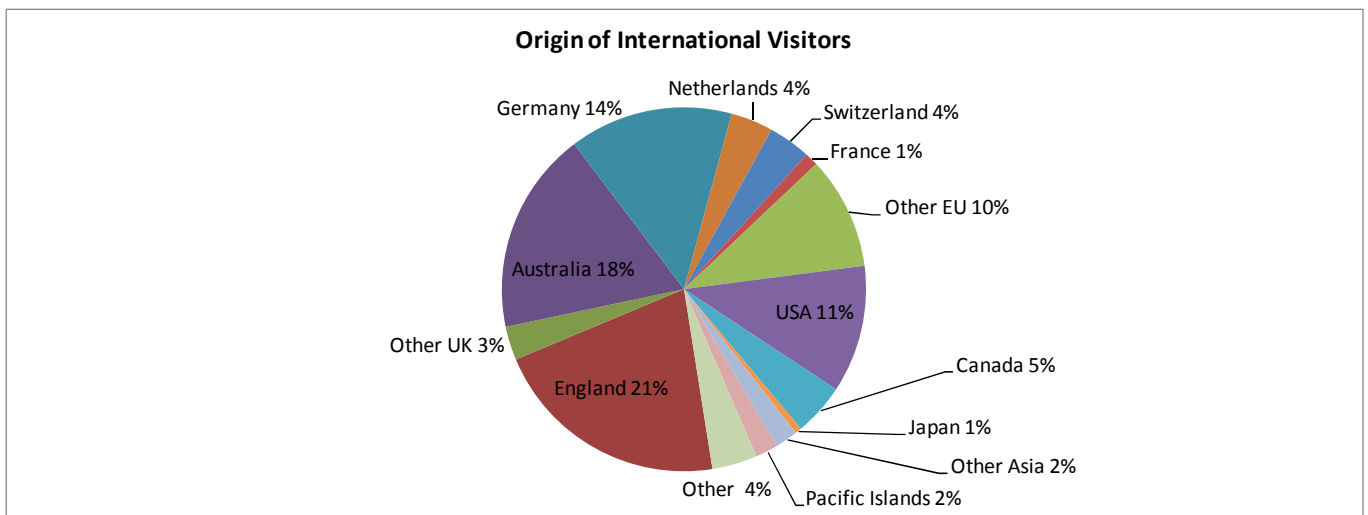
- Visitors to the Ruapehu Region were from a relatively even spread of age groups. Australia, England and Germany collectively contributed more than half of the region's international visitors, while Auckland was home to a third of its domestic visitors. Most visitors (77%) had travelled to the Ruapehu Region for a holiday, and around 8 out of 10 international visitors were in the region for the first time.
- Seeing natural or other attractions were priorities for 86% of holiday visitors, and one third of visitors were in the region to participate in an activity. 40% of international visitors were motivated by the opportunity to visit a 'must-see destination'.
- Expectations of the Ruapehu Region were high, especially in relation to the region's natural attributes, such as its landscapes and scenery and clean and unpolluted environment. High expectations in relation to a range of other attributes were also reported, such as friendly locals, a relaxing place to visit, safe and secure, adventure and excitement, unique activities and unique bush/plants.
- Visitors reported seeking a range of information prior to arrival in the Ruapehu Region - most prominent of which was information on activities and attractions and accommodation, with 61% of visitors seeking information on each. International visitors were significantly more likely to seek information on activities and attractions than domestic visitors however (74% vs. 44%). International visitors were also much more likely to use guide-books to search for information on the region, with 81% of all international visitors using these books as part of their information search. The I-Site/information centre networks and advice from family and friends were also used by significant numbers of visitors. Use of online sources of information was less common among international visitors, although a sizeable 48% of domestic visitors used the internet to find out about the Ruapehu Region before they arrived.
- Nearly half (29%) of all visitors were travelling as one of pair, and 39% were travelling in a group of 3 or more people. Nearly 60% of visitors reported travelling with their partner, and a third of domestic travellers were also travelling with their friends. 7% of domestic visitors surveyed were travelling as part of a school group.
- Private cars were the most popular means of travelling to Ruapehu among domestic visitors, while international visitors were more likely to use rental cars or motor homes. Camping grounds/holiday parks were used by around a quarter of international visitors, and domestic visitors utilised these, motels and hotels in roughly equal measure. Satisfaction with private accommodation and transport options was the highest overall.
- A significant majority (82%) of all visitors spent some time walking or tramping in the Ruapehu Region, with many also reporting undertaking sightseeing and visiting other natural attractions.
- Visitors' satisfaction with their experiences in the Ruapehu Region is generally very high. Accommodation and activity operators received the highest satisfaction ratings of the service providers measured, while car parking and street cleaning/rubbish removal were the most highly rated public amenities.
- The Ruapehu Region's natural landscapes and scenery were very highly rated by visitors and, despite the large number of visitors who took part in tramping, visitors also felt that the region was very relaxing. Maori cultural activities and experiences received amongst the lowest ratings in terms of visitor satisfaction.
- Overall, visitors rated their experiences in the Ruapehu Region very favourably, and more than half were extremely interested in returning to the region.
- While few visitors currently participate in Maori experiences or activities, a significant minority of visitors expressed an interest in doing so. This interest was particularly strong amongst international visitors.

Visitor Profile

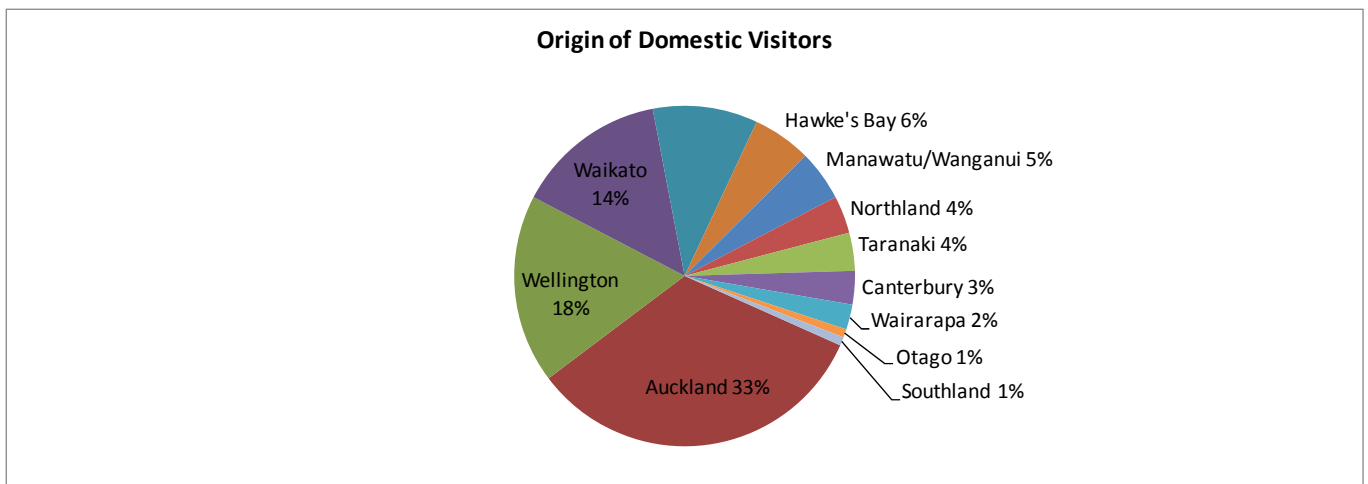
Age



Country of Origin (International Visitors)



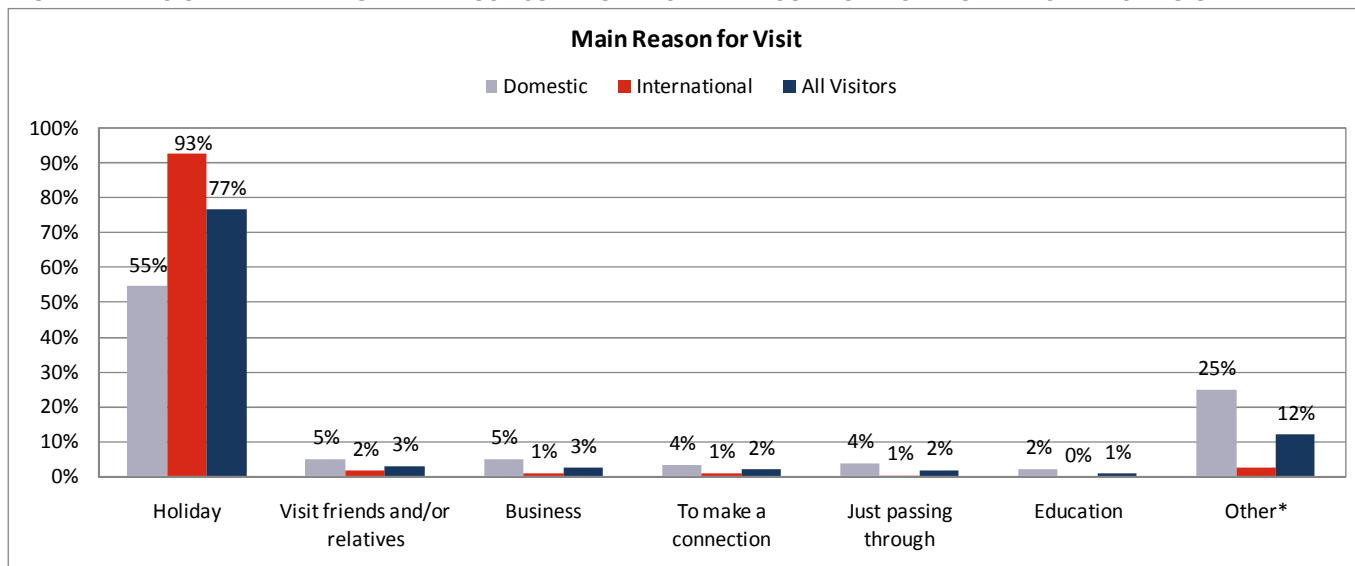
Region of Origin (Domestic Visitors)



Visitor Motivations

Main Reason for Visit

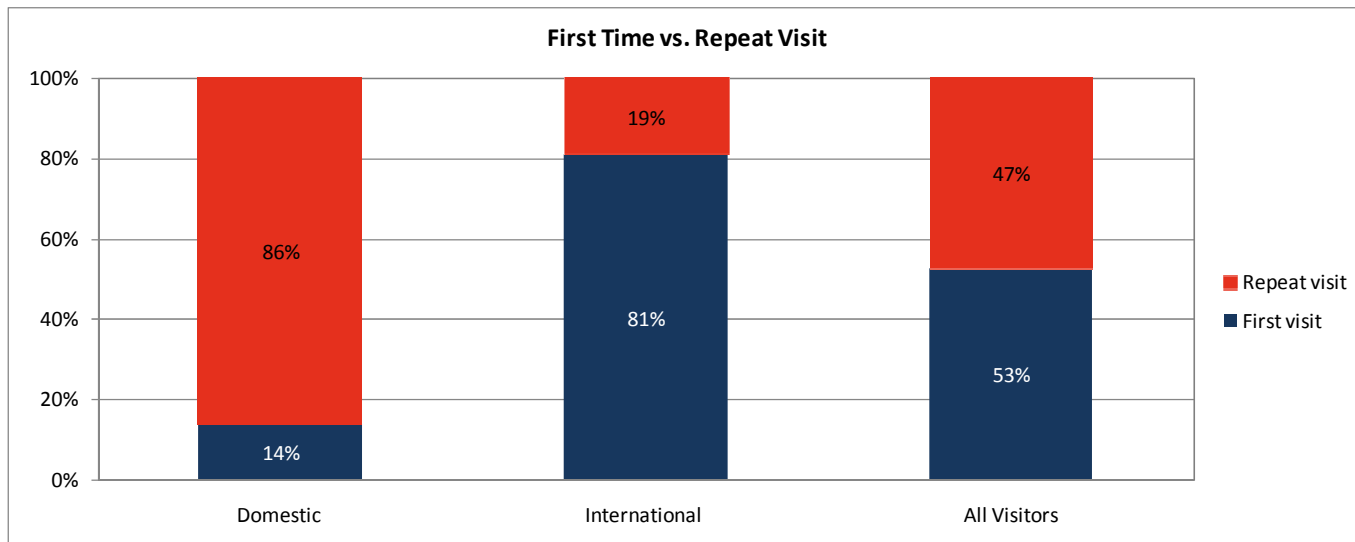
'HOLIDAY' WAS OVERWHELMINGLY THE MOST COMMONLY CITED REASON FOR VISITING THE RUAPEHU REGION



*Note that most respondents selecting 'Other' were in fact attending a leisure-based event (mostly either a fishing or rodeo event). For this reason, domestic 'holiday' visitors are under-reported in this chart.

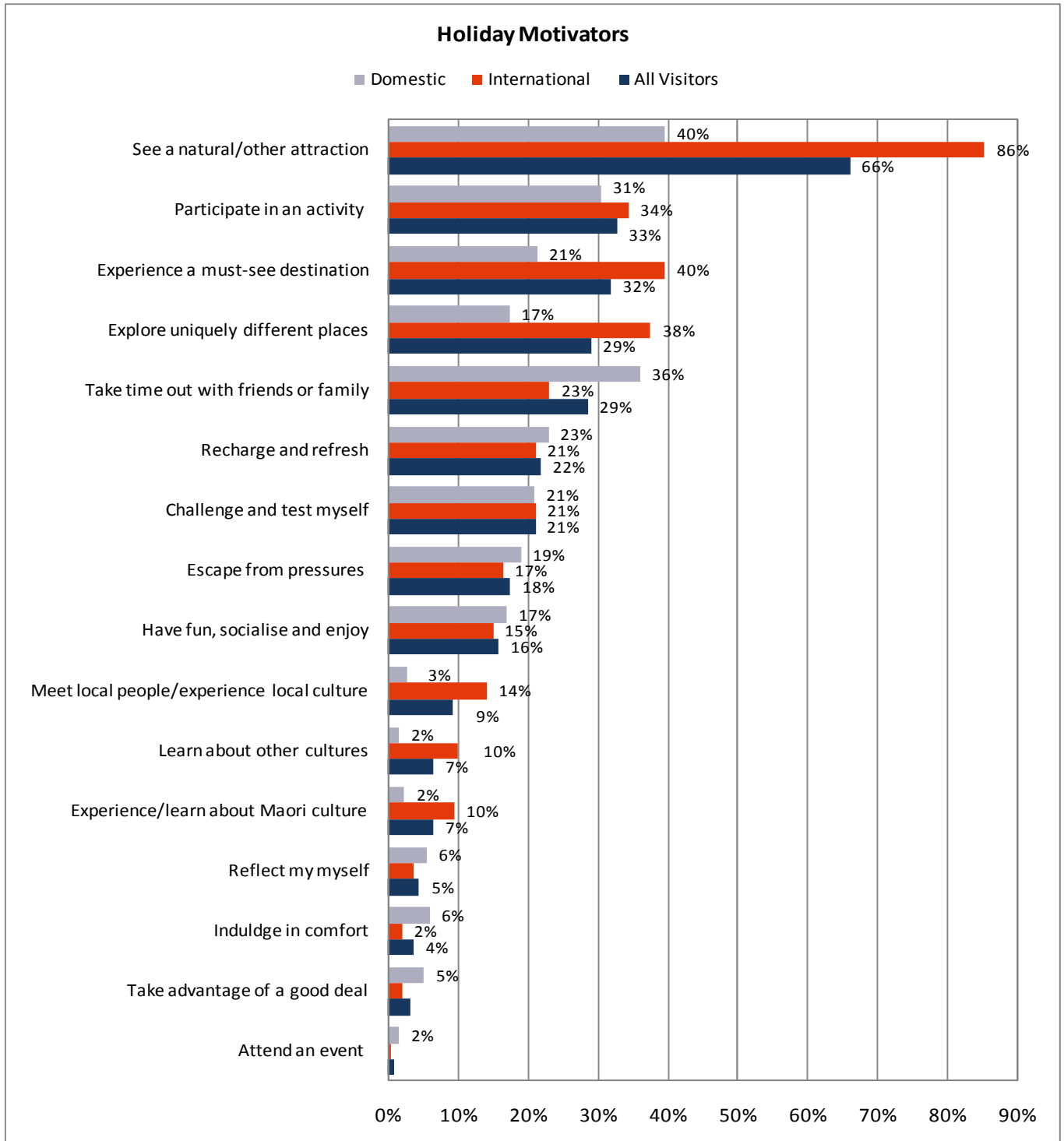
First Time / Repeat Visitors

A MUCH GREATER PROPORTION OF DOMESTIC VISITORS TO THE RUAPEHU REGION WERE ON REPEAT VISITS, WITH AROUND 80% OF INTERNATIONAL RESPONDENTS VISITING THE REGION FOR THE FIRST TIME



Holiday Motivation

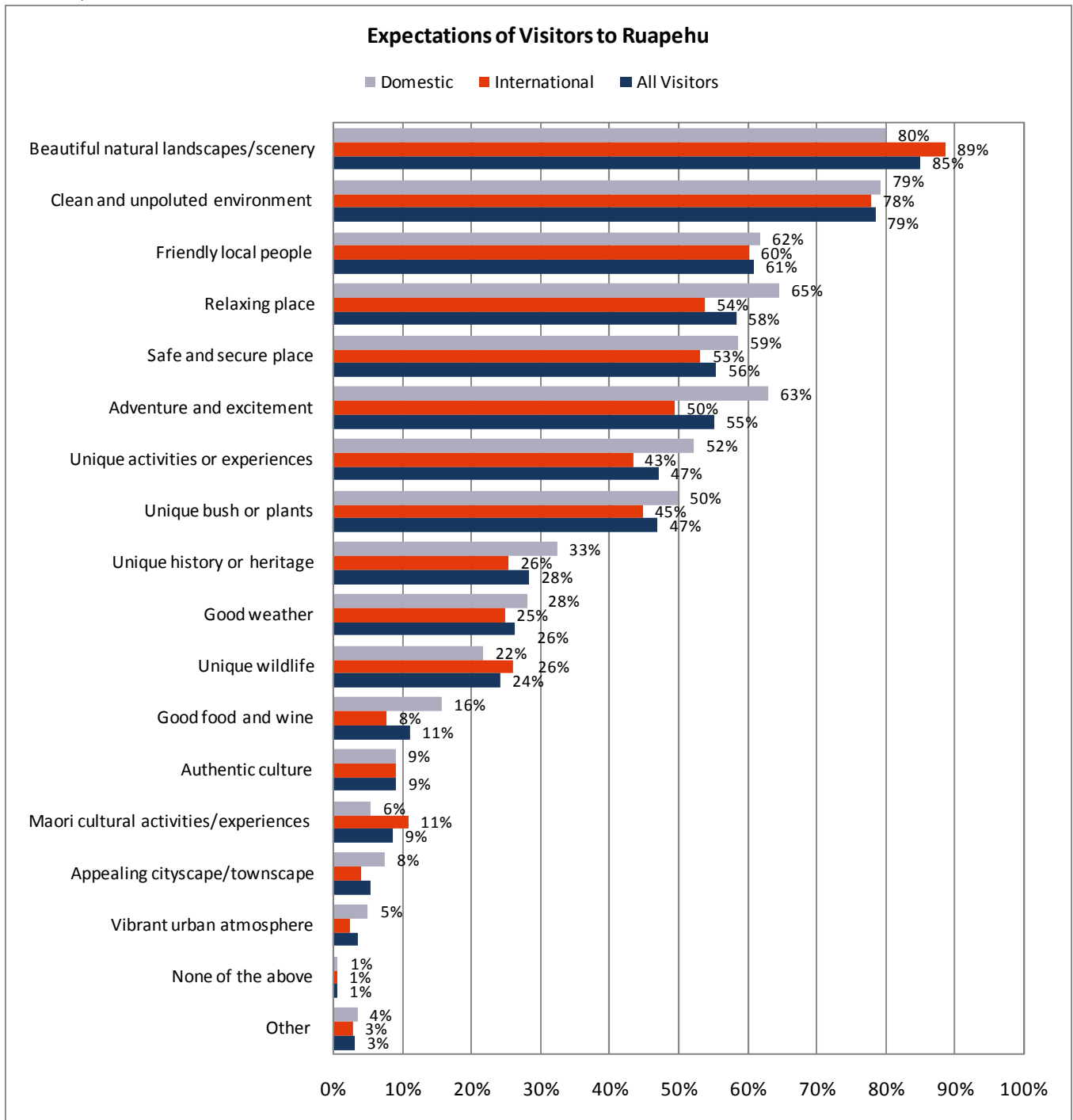
TWO THIRDS OF VISITORS TO THE RUAPEHU REGION WERE MOTIVATED BY THE DESIRE TO SEE A NATURAL OR OTHER ATTRACTION, AND THIS MOTIVATION WAS PARTICULARLY STRONG AMONGST INTERNATIONAL VISITORS. INTERNATIONAL VISITORS WERE ALSO MORE LIKELY TO BE INTERESTED IN EXPERIENCING A 'MUST-SEE DESTINATION' AND A 'UNIQUELY DIFFERENT PLACE' THAN THEIR DOMESTIC COUNTERPARTS



NB: While 'Attend an Event' appears to be a lower priority for holiday visitors, many people who were attending events selected 'other' in response to the previous question and were therefore not included in the analysis of holiday visitors. For this reason, it is estimated that around 25% of all domestic visitors to the Ruapehu Region surveyed were there to attend an event.

Visitor Expectations

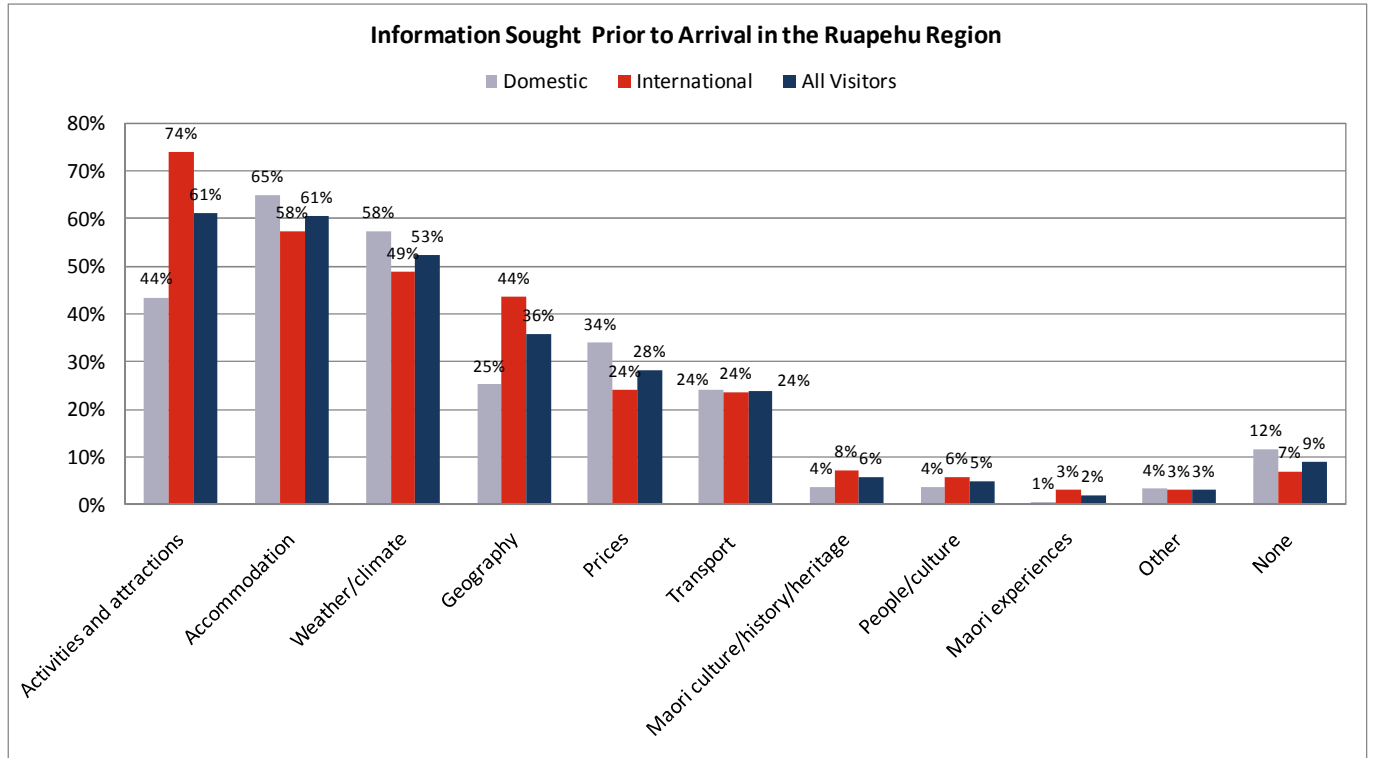
EXPECTATIONS OF VISITORS TO THE RUAPEHU REGION ARE RELATIVELY SIMILAR AMONGST DOMESTIC AND INTERNATIONAL VISITORS, WITH EXPECTATIONS HIGHEST IN RELATION TO THE REGION'S NATURAL ATTRIBUTES



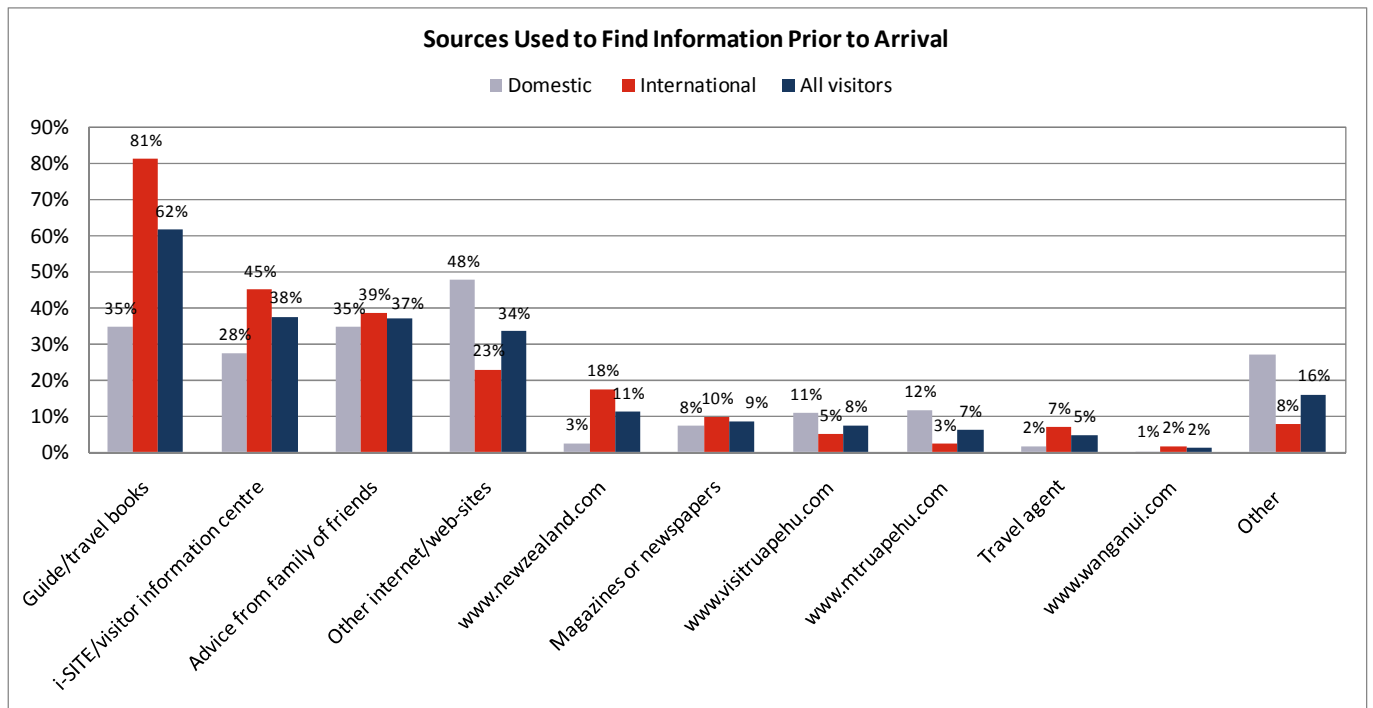
Travel Planning

Seeking Information

NEARLY THREE QUARTERS OF INTERNATIONAL VISITORS SOUGHT INFORMATION ON ACTIVITIES AND ATTRACTIONS IN THE REGION BEFORE THEY ARRIVED. DOMESTIC VISITORS WERE SLIGHTLY MORE LIKELY TO SEEK INFORMATION ABOUT ACCOMMODATION, WEATHER AND PRICES.



GUIDEBOOKS WERE THE MOST POPULAR SOURCE OF INFORMATION FOR INTERNATIONAL VISITORS, ALTHOUGH BOTH INTERNATIONAL AND DOMESTIC VISITORS ALSO USED A RANGE OF OTHER SOURCES. DOMESTIC VISITORS' USE OF ONLINE RESOURCES IS ESPECIALLY NOTABLE.



Interest in Maori Experiences

As reported elsewhere in this report, only 6% of respondents sought information on Maori cultural, history and heritage experiences and 9% of visitors engaged in these activities.

In addition to these measures, respondents were asked to rate their interest in participating in different types of Maori activities and experiences if they were available in the Ruapehu Region. Ratings are shown in the following table, and indicate that visitors are polarised in this regard, with a solid core of (especially international) visitors expressing high levels of interest in Maori experiences (by rating their interest as 8, 9, or 10 out of 10).

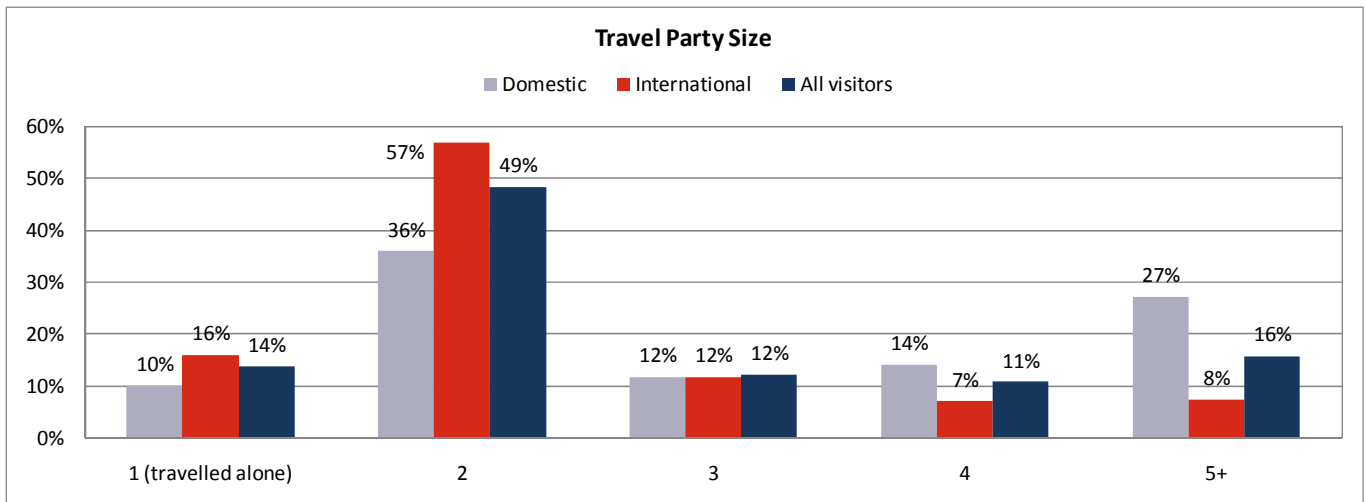
Interest in Maori experiences	Rating Interest*			Visitors choosing 8, 9 or 10		
	Domestic	International	All visitors	Domestic	International	All Visitors
See dance and/or musical performance/games and art	3.6	5.6	4.8	9%	31%	22%
See and hear stories	4.5	6.2	5.5	17%	38%	29%
Learn Maori perspectives	4.5	6.3	5.6	20%	43%	34%

* Figures represent averages given by respondents on a 1 to 10 point scale where 1=extremely disinterested and 10=extremely interested

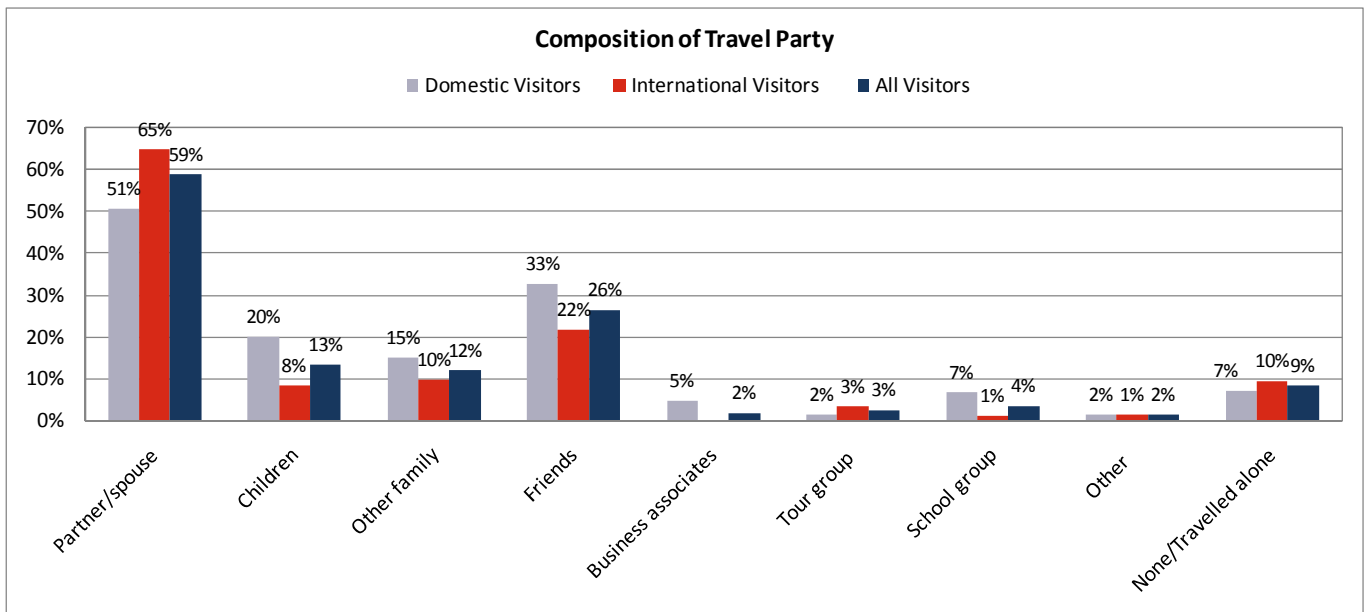
Travel Patterns

Travel Parties

AROUND HALF OF ALL VISITORS WERE TRAVELLING IN PAIRS AND MORE THAN A QUARTER OF DOMESTIC VISITORS TRAVELLED IN A PARTY OF 5 OR MORE PEOPLE



INTERNATIONAL VISITORS WERE MORE LIKELY THAN DOMESTIC VISITORS TO TRAVEL WITH PARTNERS, BUT LESS LIKELY TO DO SO WITH CHILDREN OR FRIENDS



Intended Duration of Stay

DOMESTIC VISITORS INTENDED TO STAY IN THE REGION FOR A SHORTER PERIOD, ON AVERAGE, THAN INTERNATIONAL VISITORS

	All Visitors	Domestic Visitors	International Visitors
Average Intended Stay (nights)	7.6	5.9	11

NB: Note that visitors intending to stay 180 days or more were excluded from this analysis

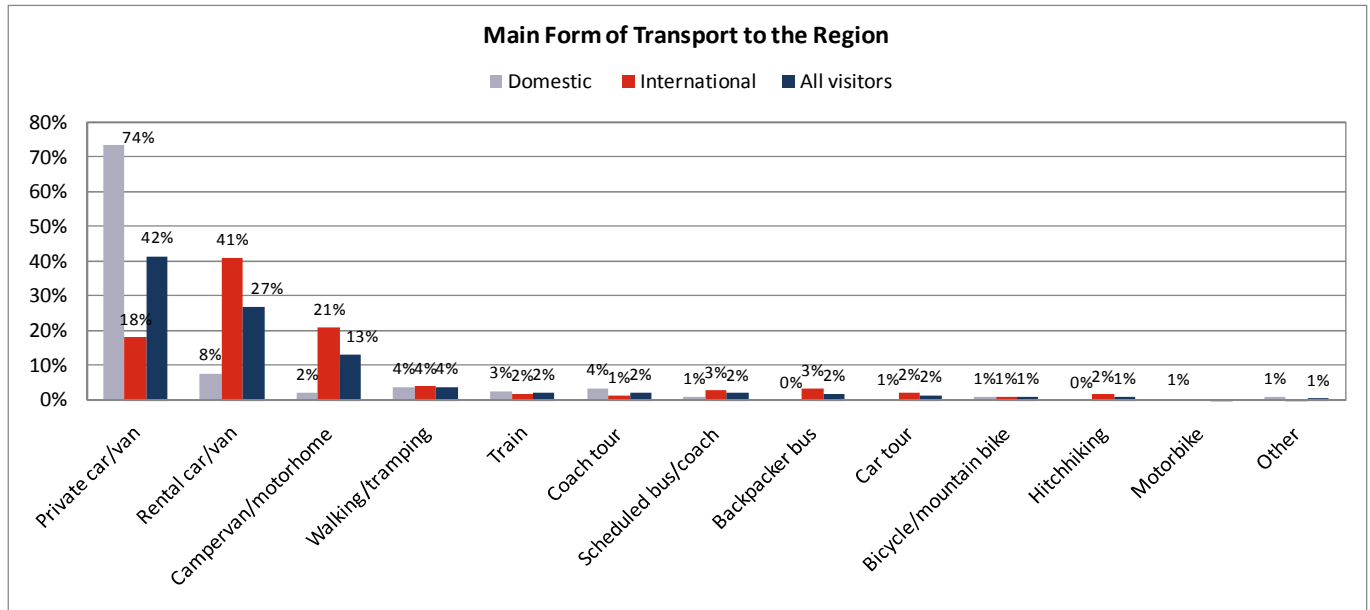
Other Regions Visited on Current Trip

MORE THAN HALF OF DOMESTIC VISITORS WERE ONLY VISITING THE RUAPEHU REGION, WHILE ALMOST NO INTERNATIONAL VISITORS REPORTED THAT THIS WAS THE CASE. INTERNATIONAL VISITORS WERE MORE LIKELY TO VISIT SOME SOUTH ISLAND REGIONS THAN THOSE ADJOINING RUAPEHU.

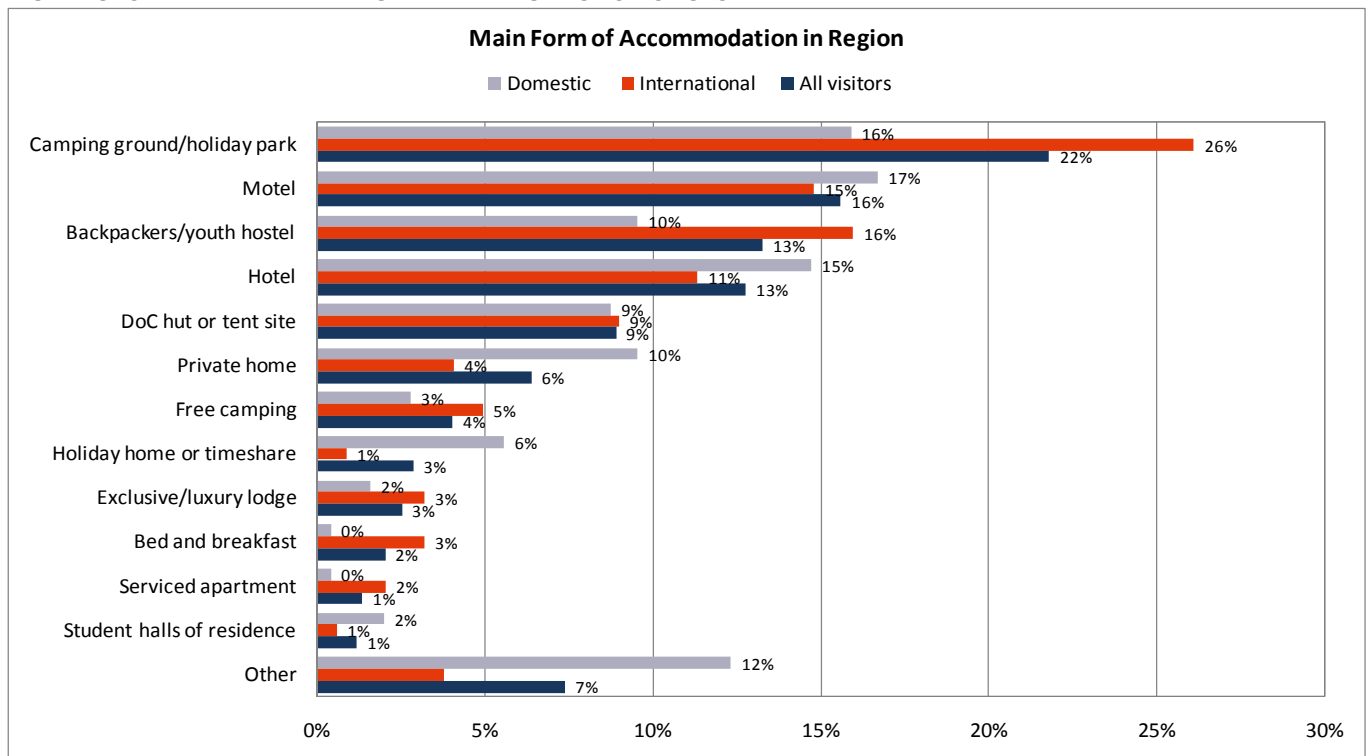
Other Regions Visited on Current Trip	All Visitors %	Domestic Visitors %	International Visitors %
Waikato	56	29	76
Auckland	52	12	81
Bay of Plenty	48	16	72
Wellington	47	16	70
Canterbury	35	5	57
West Coast	33	5	54
Otago	33	4	55
Marlborough	32	5	52
Southland	32	4	52
Northland	31	8	48
Tasman	27	4	43
Nelson	26	4	43
Manawatu/Wanganui	23	13	31
Hawke's Bay	21	9	29
Taranaki	17	10	23
Wairarapa	15	6	22
Gisborne	8	4	12
None	24	56	1

Transport and Accommodation

DOMESTIC VISITORS MOSTLY USED THEIR OWN VEHICLES TO TRAVEL TO THE REGION, WHILE INTERNATIONAL VISITORS WERE MORE LIKELY TO USE RENTAL VEHICLES.



JUST OVER ONE IN FIVE VISITORS SURVEYED STAYED IN CAMPING GROUNDS OR HOLIDAY PARKS. THIS OPTION WAS MUCH MORE POPULAR WITH INTERNATIONAL THAN DOMESTIC VISITORS.



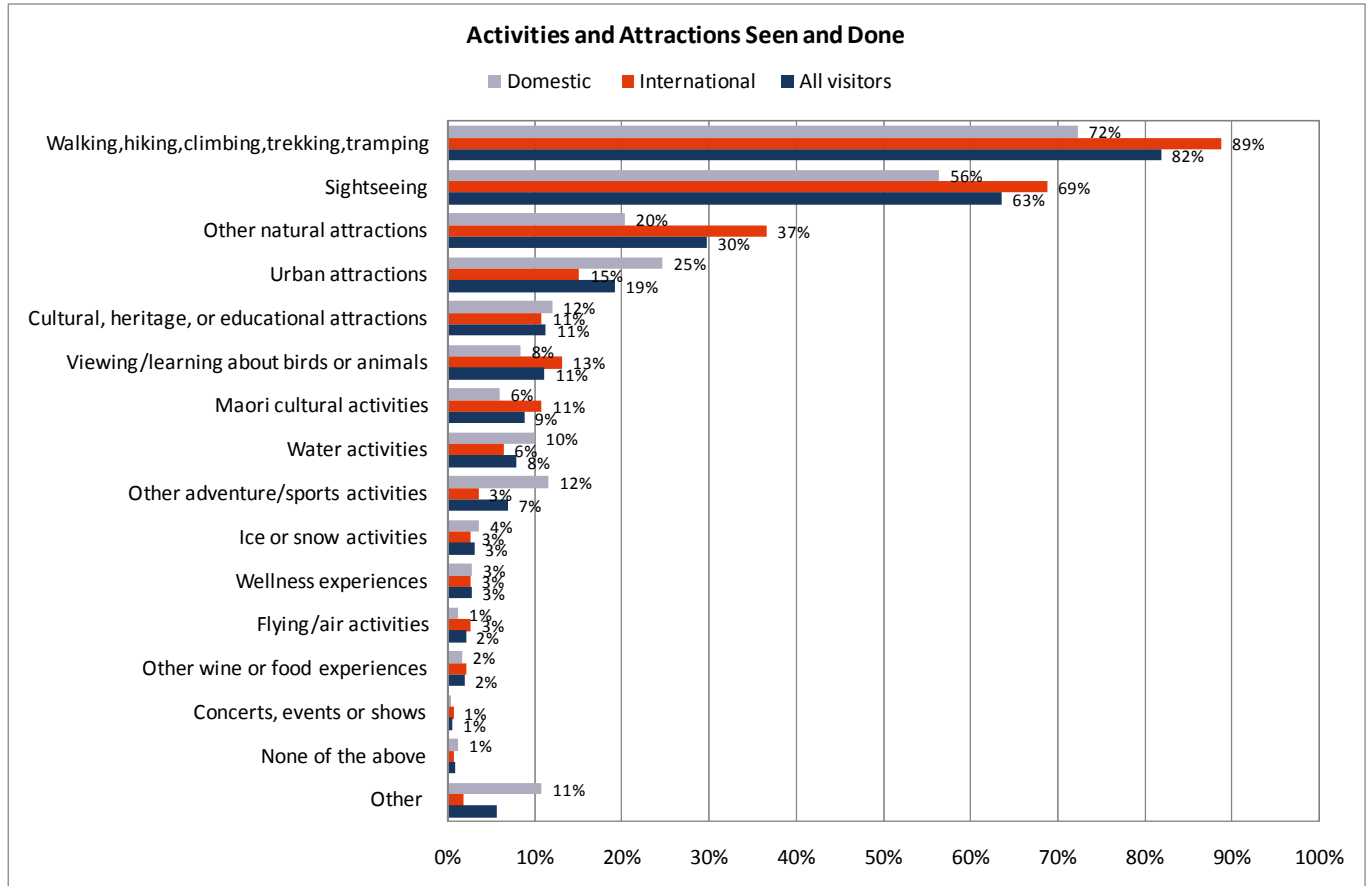
*Around half of respondents choosing 'other' forms of accommodation were staying in either commercial or club ski-lodges.

SATISFACTION WITH MAIN FORMS OF TRANSPORT AND ACCOMMODATION IS HIGH

Main Form of Transport to Region	Average Satisfaction Rating (1-10)	Main Form of Accommodation in Region	Average Satisfaction Rating (1-10)
Private car/van	9.0	Private home	9.1
Rental car/van	8.7	Camping ground/holiday park	8.0
Campervan/motor home	8.6	Motel	7.4
		Backpackers/youth hostel	7.7
		Hotel	8.3
		DoC hut/tent site	8.1

Activities and Attractions

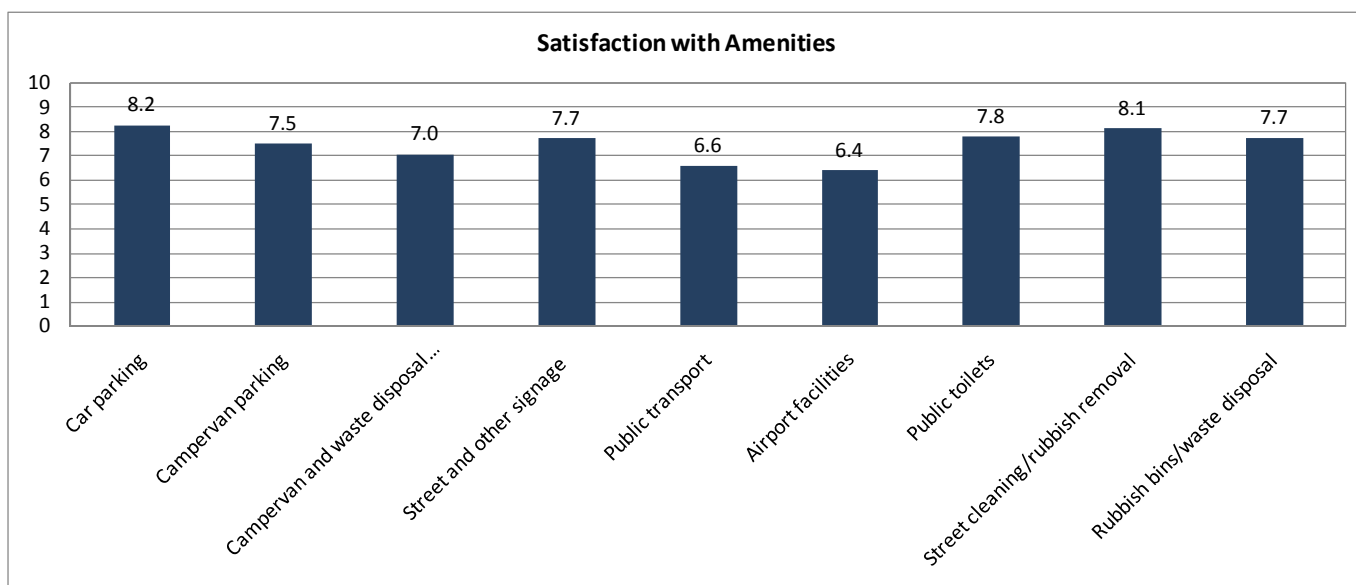
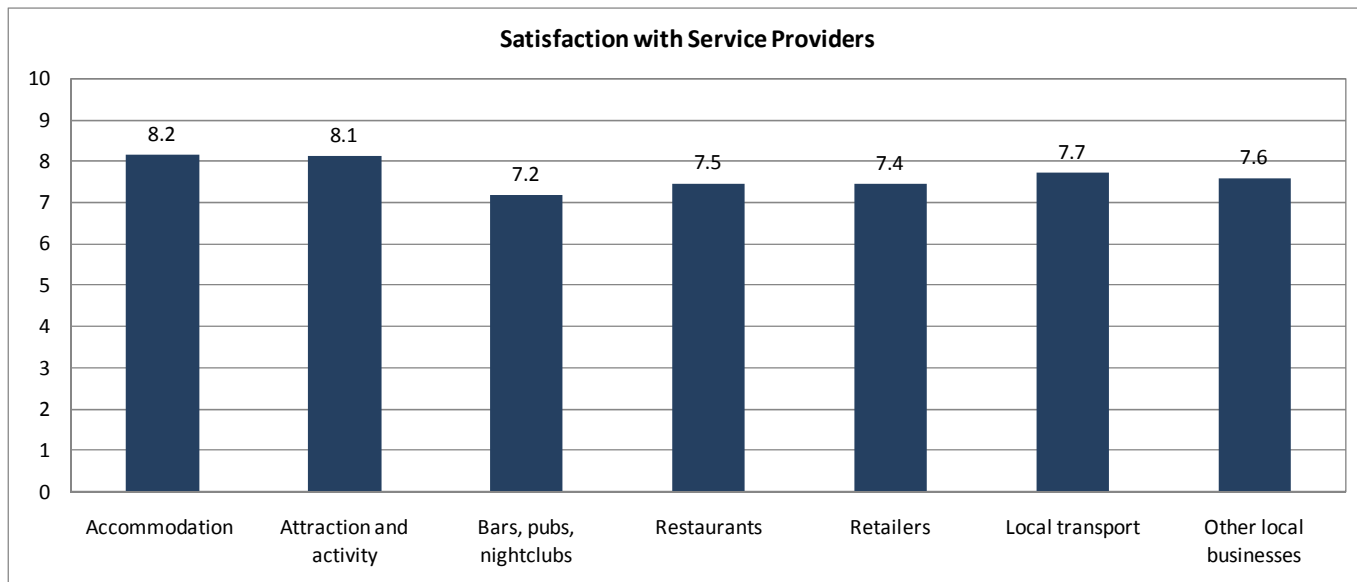
OUTDOOR ACTIVITIES WERE THE MOST POPULAR, WITH A LARGE PROPORTION OF VISITORS WALKING OR HIKING IN THE REGION.



Satisfaction with the Ruapehu Region

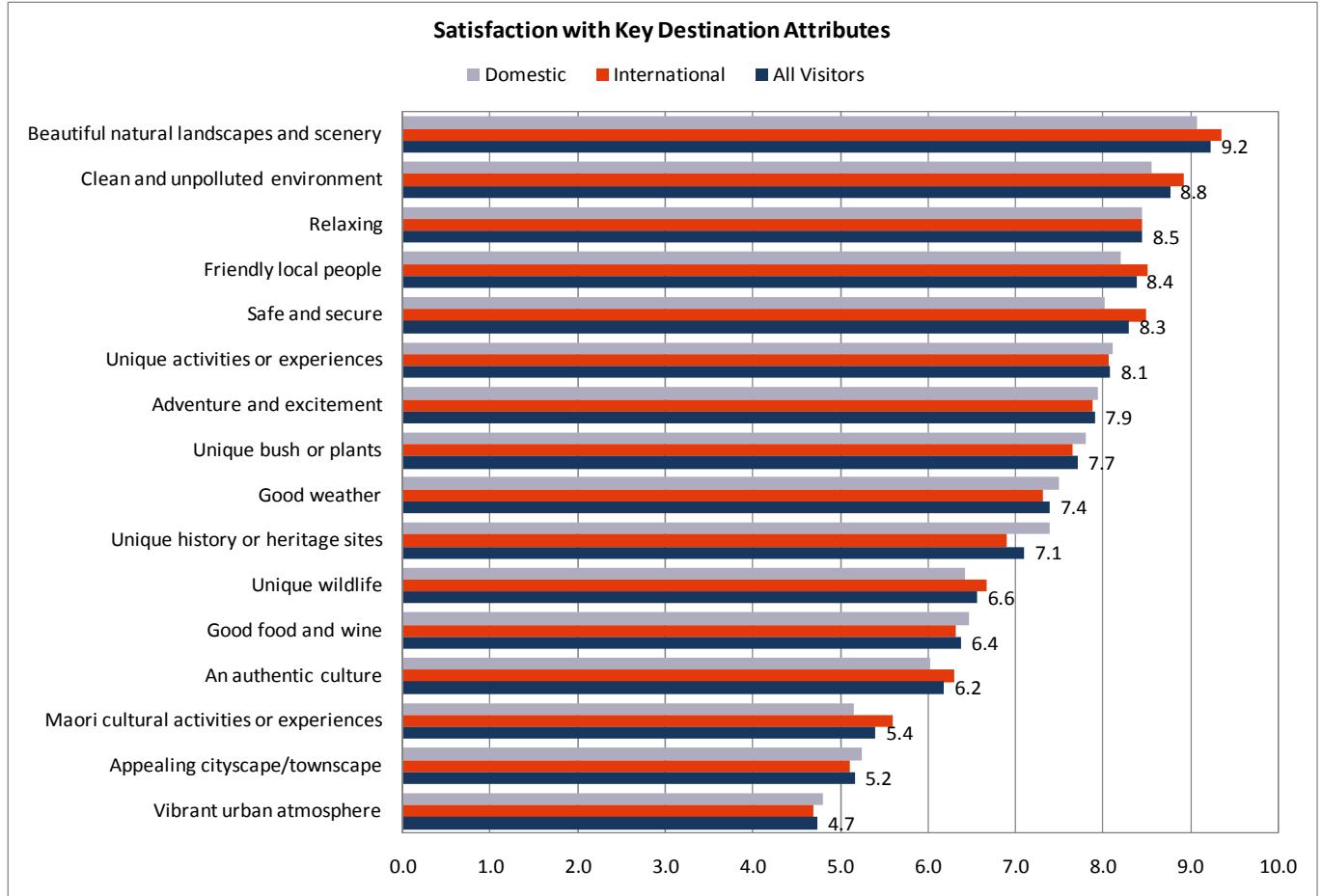
Satisfaction with Amenities and Service

SATISFACTION WITH SERVICES WAS HIGHEST IN RELATION TO ACCOMMODATION AND ATTRACTION OPERATORS. CAR PARKING WAS RATED MORE FAVOURABLY THAN CAMPERVAN PARKING.



Destination Attributes

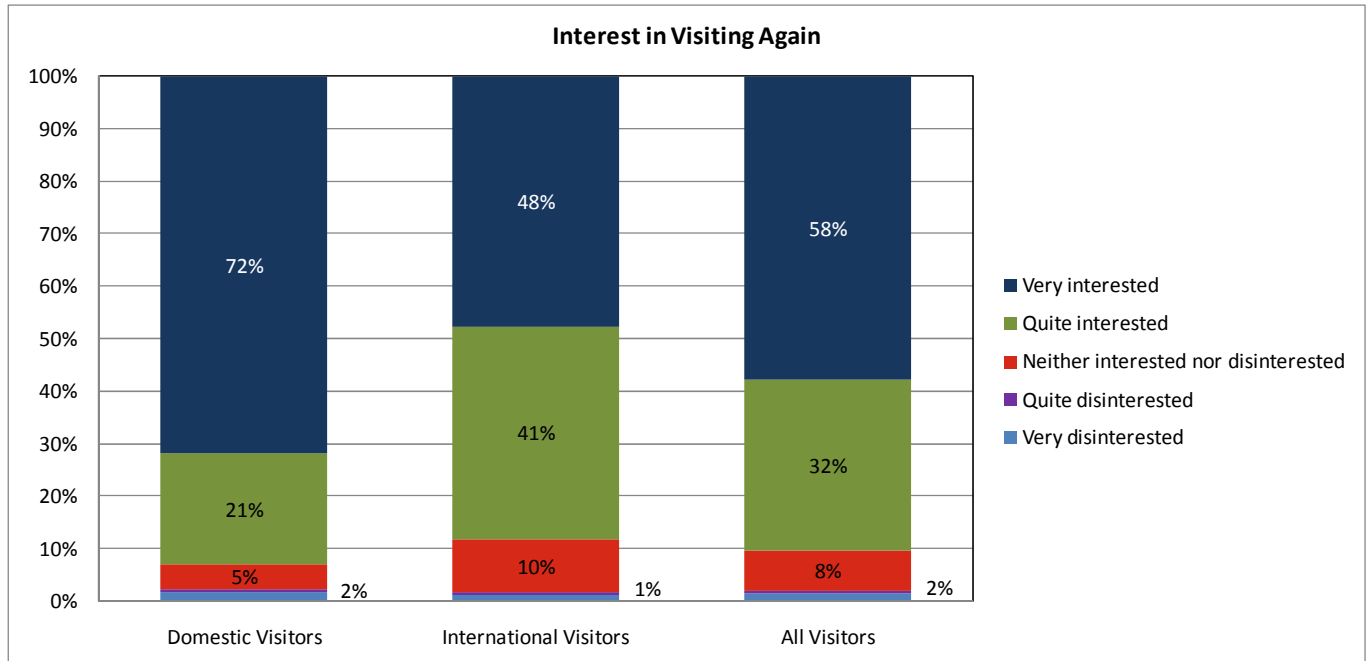
RUAPEHU'S ENVIRONMENTAL ATTRIBUTES AND ACTIVITIES RATE HIGHLY WITH INTERNATIONAL AND DOMESTIC VISITORS



NB: Figures represent averages given by respondents on a 1 to 10 point scale where 1=poor and 10=excellent.

Interest in Visiting Again

ALMOST ALL VISITORS WERE KEEN TO RETURN TO THE REGION IN THE FUTURE, AND MORE THAN HALF OF THEM WERE EXTREMELY INTERESTED IN DOING SO



Overall Satisfaction

OVERALL SATISFACTION WITH EXPERIENCES IN THE RUAPEHU REGION IS SIMILARLY HIGH AMONGST BOTH VISITOR GROUPS

Overall Satisfaction	Domestic	International	All Visitors
	8.6	8.6	8.6

NB: Figures represent averages given by respondents on a 1 to 10 point scale where 1=poor and 10=excellent.

Highlights of Visit

When asked to describe the highlights of their visit, both domestic and international visitors often remarked upon the scenic attributes of the region, with many choosing the Tongariro crossing (or some other walk) as their highlight. Many (mostly domestic) travellers also commented favourably on events that they had taken part in or attended, such as the Kawarau Krusher event and the Raetihi Rodeo.

Lowlights of Visit

When asked to describe the 'lowlights' (if any) of their visit, respondents identified a range of specific aspects of their travel, accommodation, or service that they received, as not meeting their expectations. Some service providers were singled out more than others. The weather was decried by some visitors, especially by those who experienced some unseasonably poor weather during the late summer months.