

TOURIST ACTIVITY | NATURE-BASED TOURISM

NEW ZEALAND | SERIES B3 | AUGUST 2009



INTRODUCING NATURE-BASED TOURISM

Natural attractions are widely regarded as New Zealand's key draw-card for international visitors. Nature-based tourism comprises a number of outdoor activities undertaken by tourists in the natural environment. Nature-based tourism ranges from high impact adventure activities such as jet boating, skydiving and mountain climbing to more relaxing activities such as bush walking, wildlife and scenic tours and boat cruises.

This report provides an overview of nature-based tourism in New Zealand including trends and characteristics of tourists who participate in activities within New Zealand's natural environment.

Nature-based tourists are defined as international and domestic visitors, aged 15 years and over, who participate in at least one nature-based activity while travelling in New Zealand. Local residents participating in nature-based activities within their area are not included in this definition.

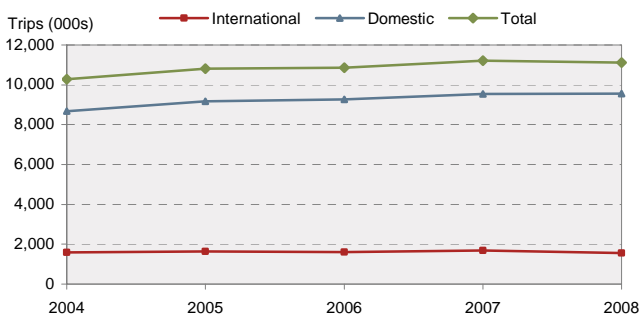
TRENDS IN NATURE-BASED TOURISM

How many tourists participate in nature-based activities?

In 2008, 2.0 million tourists took part in nature-based activities, who produced 11.1 million nature-based trips (as a tourist can take more than one trip in a year). 1.6 million were international trips (or 70% of all international trips) and 9.6 million were domestic trips (or 22% of all domestic trips).

Over the 2004-2008 period, participation in nature-based activities by international tourists has remained stable. However participation by domestic tourists has been increasing gradually. The overall trend has been steadily increasing over 2004-2007 but with a drop in 2008 mainly by international tourists (Figure 1).

Figure 1: Nature-Based Activities by Tourists, 2004-2008*1*2



Propensity, or likelihood, of international tourists participating in at least one nature-based activity has remained high and stable at around 70% of visitors.

The propensity for domestic tourists was lower at around 22%, owing to a higher proportion of visitors being on business or visiting friends and relatives.

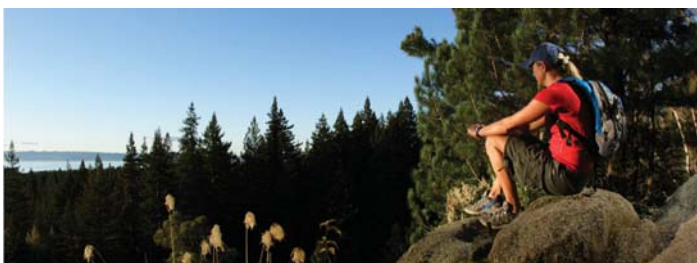
What are the most popular nature-based activities?

Table 1 shows the top 30 nature-based activities (out of 75) undertaken by international and domestic tourists. The most popular activity is going to beaches, particularly for domestic tourists. Also popular are various scenic trips, bush walks, wildlife and adventure activities. Some activities are more popular for international tourists such as scenic boat cruises, scenic flights, visiting geothermal attractions, glaciers and glow worm caves.

Table 1: Top 30 Nature-Based Activities Undertaken by International and Domestic Tourists, 2008*1*2

INTERNATIONAL TOURISTS			DOMESTIC TOURISTS		
Activity	Visitors (000s)	Propensity (%)	Activity	Visitors (000s)	Propensity (%)
Beaches	858	38.7%	Beaches	3,269	7.5%
Scenic Boat Cruise	554	25.0%	Fishing	1,533	3.5%
Geothermal Attractions	500	22.5%	Hot Pools	982	2.3%
Lakes	461	20.8%	Bush Walk (1/2 Hour)	603	1.4%
Scenic Drive	445	20.0%	Scenic Drive	582	1.3%
Hot Pools	382	17.2%	Snow Sports	376	0.9%
Glacier (Walk/View)	325	14.7%	Surfing	367	0.8%
Sightseeing Tour (Land)	249	11.2%	Hunting/Shooting	358	0.8%
Bush Walk (1/2 Hour)	248	11.2%	Sightseeing Tour (Land)	352	0.8%
Glow Worm Caves	227	10.2%	Trekking/Tramp	315	0.7%
Bush Walk (1/2 Day)	225	10.2%	Bush Walk (1/2 Day)	292	0.7%
National Parks	211	9.5%	Canoeing, Kayaking, Rafting	280	0.6%
Trekking/Tramp	201	9.0%	Lakes	276	0.6%
Jet Boating	182	8.2%	Scenic Boat Cruise	263	0.6%
Waterfalls	178	8.0%	Mountain Biking	238	0.5%
Seal Colony	164	7.4%	Scuba Diving/Snorkling	193	0.4%
Canoeing, Kayaking, Rafting	147	6.6%	National Parks	144	0.3%
Scenic Flight	129	5.8%	Waterfalls	142	0.3%
Penguins	125	5.6%	Jet Boating	123	0.3%
Fishing	116	5.2%	Horse Trekking/Riding	86	0.2%
Dolphin Watching/Swimming	111	5.0%	Water Skiing	77	0.2%
Snow Sports	99	4.5%	Scenic Train Trip	76	0.2%
Mountains	90	4.0%	Sport Climbing	69	0.2%
Whale Watching	90	4.0%	Geothermal Attractions	69	0.2%
Albatross Colony	79	3.6%	Caving	69	0.2%
Scenic Train Trip	73	3.3%	Glacier (Walk/View)	66	0.2%
Sky Diving	65	2.9%	Rivers	56	0.1%
Rivers	61	2.7%	Mountains	51	0.1%
Sailing	42	1.9%	Mountain Climbing	48	0.1%
4WD Sports	42	1.9%	Sailing	46	0.1%

Propensity, or likelihood, is the proportion of all tourists that took part in the activity.



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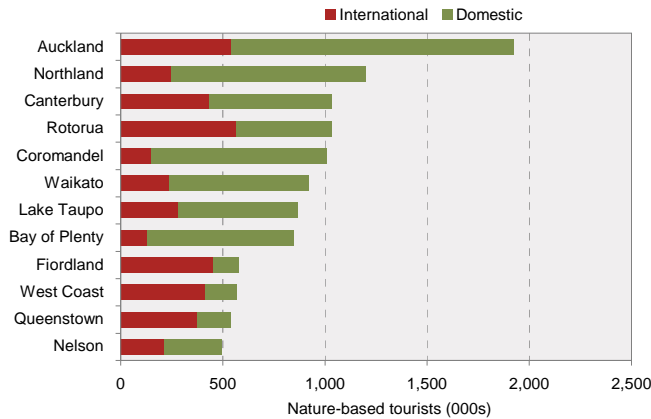


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Where do tourists experience nature-based activities?

In 2008 the Regional Tourism Organisation (RTO) area with the most tourists undertaking nature-based activities was Auckland (1.92 million tourists). This was followed by Northland (1.20 million), Canterbury (1.03 million) and Rotorua (1.03 million) (Figure 2).

Figure 2: Main RTOs Where International and Domestic Tourists Undertook Nature-Based Activities, 2008^{1,2}



Tourists who participate in the same activity more than once in the same RTO are only counted once.

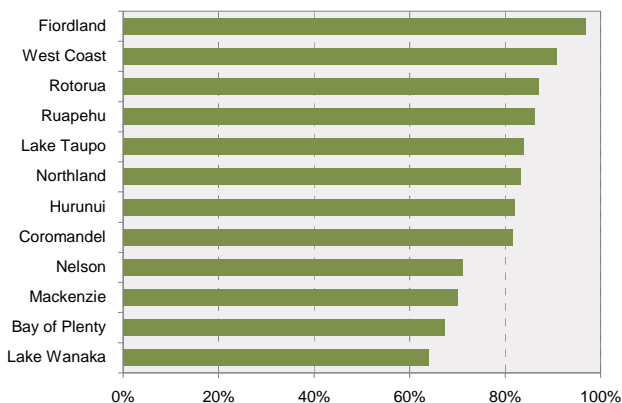
The most popular areas visited by international nature-based tourists were Rotorua (563,400 tourists, or 36% of all international nature-based tourists), Auckland (541,700, 35%) and Fiordland (453,700, 29%).

Among domestic nature-based tourists, the areas most commonly visited were Auckland (1.38 million tourists or 14%), Northland (950,800, 10%) and the Coromandel (858,800, 9%).

For international visitors the most popular nature-based activities in RTOs include - Auckland and Northland (beaches, scenic drives and cruises), Rotorua (geothermal), Waikato (glow worm caves), Nelson (beaches and trekking), Canterbury (beaches and whale watch), West Coast (glaciers), Queenstown (jet boating) and Fiordland (scenic boat cruise).

Ninety seven percent of international tourists to Fiordland RTO participated in a nature-based activity. This is the highest propensity for visitors to an RTO. This was followed by the West Coast (91%), Rotorua (87%) and Ruapehu (86%) (Figure 3). International tourists to Auckland RTO had a low propensity (31%) to participate in nature-based activities.

Figure 3: Propensity of International Tourists to Undertake Nature-Based Activities by RTO, 2008¹

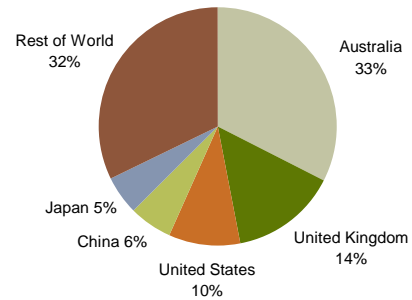


CHARACTERISTICS OF NATURE-BASED TOURISTS

Where do nature-based tourists come from?

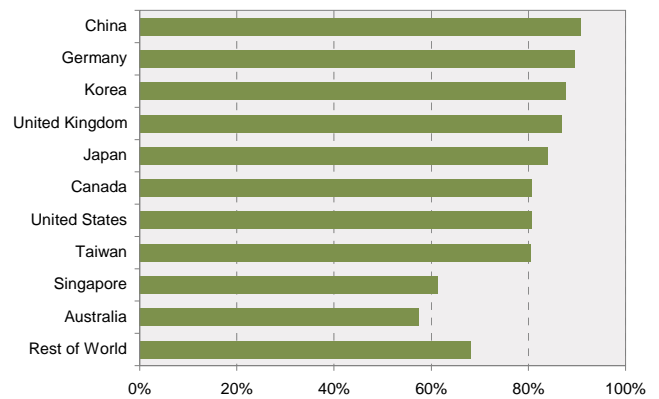
International visitors from Australia (33%), the United Kingdom (14%) and the United States (10%) made up the largest share of all international nature-based tourists (Figure 4).

Figure 4: Origin of International Nature-Based Tourists, 2008¹



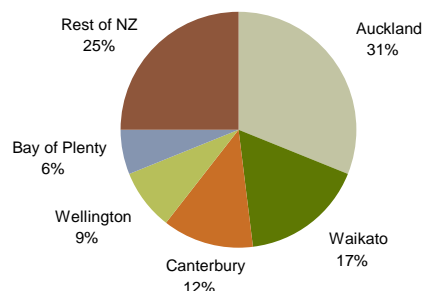
International tourists with the highest propensity to participate in nature-based activities were from China (91%), followed by Germany (90%), South Korea (88%), the United Kingdom (87%) and Japan (84%). Australian tourists (the largest market) had the lowest propensity (58%) for nature-based activities, because a significant proportion were on business or visiting friends and relatives (Figure 5).

Figure 5: Propensity for Nature-Based Activities by International Market, 2008¹



The largest shares of domestic tourists taking part in nature-based activities were those from the Auckland (31%), Waikato (17%) and Canterbury (12%) regions (Figure 6).

Figure 6: Origin of Domestic Nature-Based Tourists, 2008²

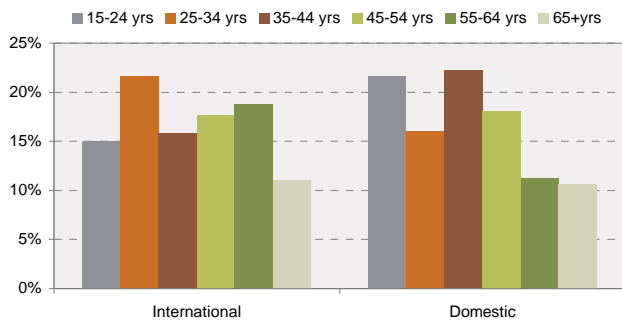


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What is the age-sex profile of nature-based tourists?

The age profiles of international and domestic nature-based tourists differ slightly. Among international tourists, those aged 25-34 years (22%) account for the largest share. This is followed by the 55-64 (19%), 45-54 (18%) and 35-44 (16%) age groups. Among domestic tourists, the profile is slightly younger, with higher proportions aged 15-24 (22%) and 35-44 (22%) (Figure 7).

Figure 7: Age Profile of Nature-Based Tourists, 2008^{1,2}



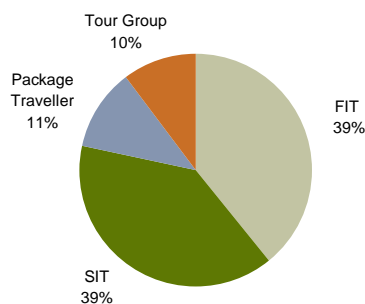
Among international tourists, propensity to participate in nature-based activities is highest among younger (15-24, 80%) and older age groups (over 65 years, 82%) but lower amongst those aged 25-64 (67%). For domestic tourists propensity is similar across all age groups at around 22%.

Participation in nature-based activities by gender is the same for international tourists but is more popular for domestic male tourists than female tourists. In 2008, females comprised 51% of international nature-based tourists, compared with 45% of domestic tourists.

What are the travel styles of international nature-based tourists?

Fully-independent travellers (FITs, 39%) and semi-independent travellers (SITs, 39%) made up the largest shares of international nature-based tourists in 2008. Package travellers (11%) and those on tour groups (10%) made up the remaining 21% (Figure 8).

Figure 8: Travel Styles of International Nature-Based Tourists, 2008¹



FIT: made and paid for all travel arrangements after arrival in New Zealand
SIT: made and paid for at least one travel arrangement before arrival in New Zealand

International tourists travelling as part of a tour group (98%) and package travellers (89%) had the highest propensity for nature-based activities. Propensity of SITs (73%) and FITs (60%) was lower.

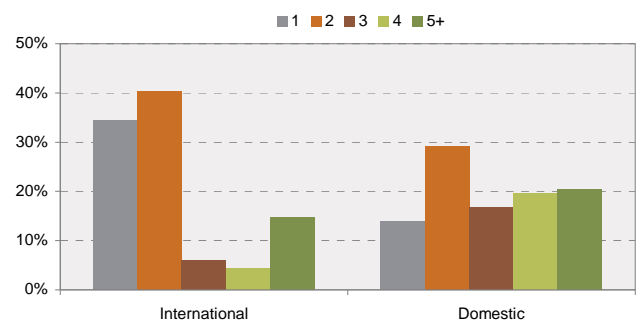
Who do nature-based tourists travel with?

The greatest share of international tourists taking part in nature-based activities in 2008 were travelling alone (34%) or with their spouse or partner (31%).

Among domestic tourists, nature-based tourists were most commonly travelling with family (36%), friends (18%) or a spouse/partner (17%).

These patterns were also reflected in the group size profile, with international nature-based tourists mostly travelling in pairs (40%) or alone (34%), and domestic nature-based tourists more likely to be travelling in groups of two or more (86%) (Figure 9).

Figure 9: Nature-Based Tourists by Group Size, 2008^{1,2}



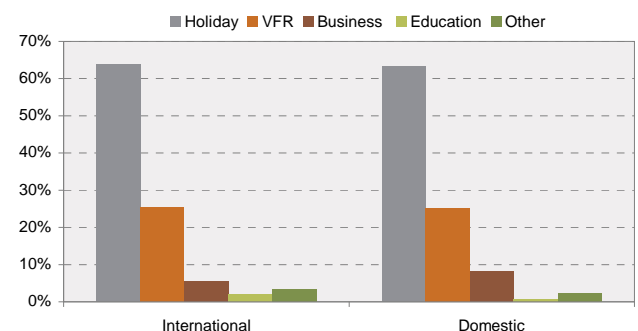
International tourists travelling in a group of four or more people, showed the highest propensity to participate in nature-based activities (89%) while those travelling alone had the lowest propensity (53%).

Among domestic tourists, propensity was also highest for those travelling in a group of four or more (32%) and lowest for those travelling alone (12%).

What are the main purposes of travel of nature-based tourists?

Tourists on holiday (64%) made up the largest share of international nature-based tourists in 2008 (Figure 10). This group also had the highest propensity to participate in nature-based activities (92% of international holiday tourists). International tourists visiting friends or relatives made up the second largest group (25%), but their overall propensity to participate in nature-based activities was lower (59%).

Figure 10: Nature-Based Tourists by Travel Purpose, 2008^{1,2}



Domestic nature-based tourists were also predominantly on holiday (63%) although a significant share were visiting friends or relatives (25%). Tourists on holiday had the highest propensity to undertake nature-based activities (34%) followed by those visiting friends and relatives (17%).

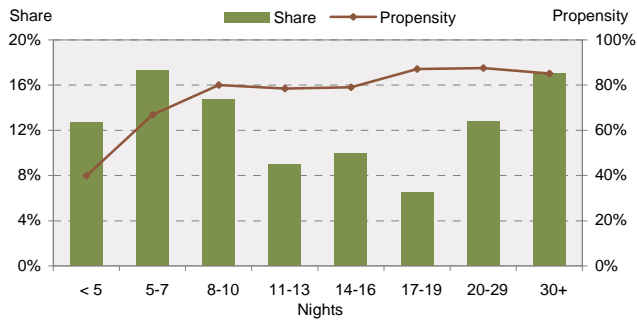
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How long do international nature-based tourists stay?

In 2008 international tourists who took part in nature-based activities stayed slightly longer on average (24 nights) than all international tourists (21 nights).

Thirty percent of international nature-based tourists stayed 20 or more nights. Propensity for nature-based tourism increases with length of stay. Those staying for 17 nights or longer had the highest propensity (86%) (Figure 11).

Figure 11: Length of Stay of International Nature-Based Tourists, 2008¹

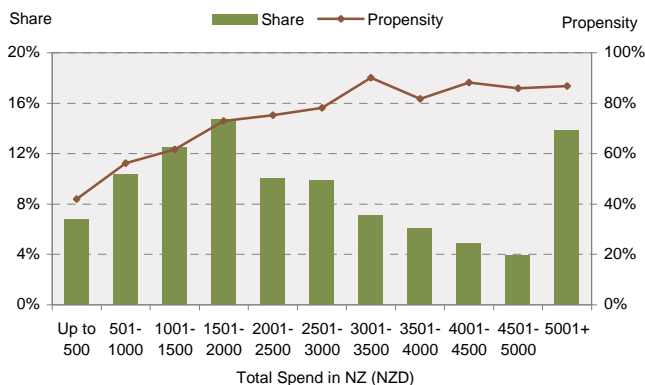


How much do international nature-based tourists spend on their trip in New Zealand?

In 2008 international nature-based tourists spent more on average per trip (\$3,040) than general tourists (\$2,680), partly due to their longer stay. In terms of average per night expenditure, nature-based tourists' spend (\$126 per night) was similar to that of general tourists (\$131 per night).

Propensity to take part in nature-based activities also increases with total spend. This partly relates to the length of stay. Tourists spending over \$3,000 on their New Zealand trip were more likely to take part in nature-based activities (87%) than those spending less than \$3,000 (Figure 12). Thirty six per cent of international nature-based tourists spent more than \$3,000 on their trip in New Zealand, while the remainder spent less than \$3,000.

Figure 12: International Nature-Based Tourist Spend in New Zealand, 2008¹



All references to spend exclude international airfares

DATA SOURCES

¹ IVS: International Visitor Survey (Ministry of Tourism)

² DTS: Domestic Travel Survey (Ministry of Tourism)

What accommodation types do nature-based tourists use?

International nature-based tourists predominantly stayed in hotels (47% stayed in a hotel at some point on their trip), private accommodation (40%) and motels (30%) in 2008. A significant share also stayed in backpackers (17%). Overall, nature-based tourists stayed in a wide range of accommodation types broadly reflecting the accommodation choices of all international tourists and the wide appeal of nature-based activities (Figure 13).

Figure 13: Accommodation Used by International Nature-Based Tourists, 2008¹

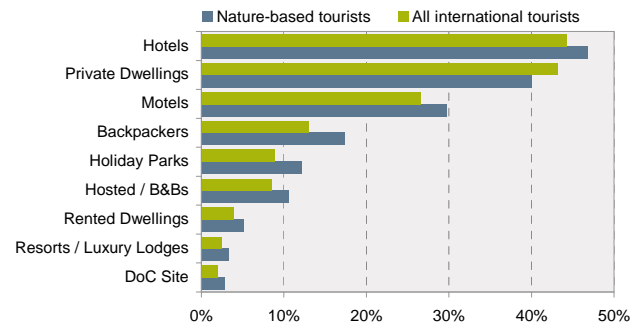


Table 2: Trends in Nature-Based Tourism^{1,2}

KEY INDICATORS	2004	2005	2006	2007	2008
Nature-based tourists					
Total	10,277,200	10,805,700	10,867,100	11,219,000	11,113,900
International	1,590,200	1,635,900	1,599,100	1,679,800	1,559,700
Domestic	8,687,000	9,169,700	9,268,000	9,539,200	9,554,200
Propensity to participate in nature-based activities					
International	74.0%	74.7%	72.7%	74.9%	70.3%
Domestic	19.7%	20.0%	21.0%	22.6%	22.0%

Table 3: Nature-Based Tourists by Key Region and Source Markets, 2008^{1,2}

Top 5 Destination Regions (RTOs)	Auckland	Northland	Canterbury	Rotorua	Coromandel	NZ
International	541,700	246,800	431,200	563,400	149,600	1,559,700
Domestic	1,381,100	950,800	602,200	468,200	858,500	9,554,200
Total	1,922,800	1,197,600	1,033,400	1,031,600	1,008,100	11,113,900
% Share	17%	11%	9%	9%	9%	100%
Top 5 International Source Markets	Australia	United Kingdom	United States	China	Japan	All
Tourists	508,700	225,000	148,900	91,800	80,800	1,559,700
% share	33%	14%	10%	6%	5%	100%
Propensity	57.5%	86.9%	80.6%	90.7%	84.1%	70.3%
Top 5 Domestic Source Markets (Regions)	Auckland	Waikato	Canterbury	Wellington	Bay of Plenty	All
Tourists	2,980,900	1,619,300	1,174,300	818,300	578,800	9,554,200
% share	31%	17%	12%	9%	6%	100%
Propensity	28.1%	24.2%	21.0%	19.0%	17.2%	22.0%

IMAGE CREDITS

Wellington Willis St. – Positively Wellington Tourism, www.WellingtonNZ.com

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Lake Taupo Lodge – www.laketapuolodge.co.nz

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