Regional Tourism Report – TWT Conservancy

Prepared for:
Department of Conservation

Angus & Associates Limited

July 2013

angus
& ASSOCIATES

P 04 499 2212
F 04 499 2216
angusassociates.co.nz

Level 21, Plimmer Towers
2-6 Gilmer Tce, PO BOX 25325
Wellington 6146 New Zealand

Table of Contents

1.0 Introduction

1.1 Background

The Tongariro Wanganui Taranaki (TWT) conservancy is embarking on the development of a series of strategic plans for Taranaki Maunga, Tongariro National Park, Wanganui National Park and Taupō Moana. These plans will be developed in a collaborative fashion with key partners (Iwi) and stakeholders (Regional Tourism Organisations, local councils, concessionaires and other communities of interest). As the Department of Conservation (the Department) is the current land manager in these areas (with the exception of Taupō which has more fragmented conservation lands), the Department is taking a lead role in facilitating the development of the strategic plans.

The intent of the planning process is to develop a long-term strategy for the management of each area. To work, this strategy will need to have the support of, and be relevant to, the wider parties identified above. It is anticipated that each strategy will not simply focus on conservation outcomes on public land but identify actions for the wider environment and local communities.

The strategic plans will need to look at how the management of each area can stay responsive to current and future demands by visitors, the needs of local communities and also future treaty settlements. It has been identified that the planning process will need to consider **environmental**, **cultural**, **social** and **economic** outcomes if it is to have the appropriate context and long-term resilience. The conservation estate sits within a wider landscape of communities and external influences (such as visitors) and any planning exercise such as this needs to be cognisant of these influences as they are now and what they could look like in the future.

An important component of the strategic planning processes will be Destination Management Plans (DMP's). DMP's seek to better understand, identify and define the long-term visitor experience for a 'place' and how that will be achieved (e.g. a strategy for the provision of visitor infrastructure and development opportunities within and around the conservation estate).

The destination management aspect of the wider planning process is important as, if done well, it will foster a viable visitor strategy which will, in turn, open up new opportunities in the local and regional economy - for investment, job creation and potential streams of income to manage and maintain cultural and natural heritage values at place.

1.2 Objectives

Angus & Associates has developed this Regional Trends and Opportunities Report to assist those charged with developing the individual DMP's for the TWT Conservancy. The objective of this report is to provide the Department and other stakeholders with a better understanding of the global, national and regional (TWT Conservancy scale) context within which each of the subsequent DMP's will be developed.

This report considers relevant global, national and regional trends in nature-based tourism, leisure preferences, cultural tourism and outdoor recreation, as well as linkages and opportunities between the individual destinations within the Conservancy.

The purpose of this review is reflected in two overarching outcomes:

1. To identify the global, national and regional (TWT Conservancy scale) context and trends for leisure preferences, tourism (including cultural tourism) and outdoor recreation; and
2. To identify leisure preferences, tourism (including cultural tourism) and outdoor recreation opportunities for the Taranaki Maunga, Tongariro National Park, Wanganui National Park and Taupō Moana.

Analysis focuses on the following objectives, to the extent that this is possible given available secondary resources and further input gathered via a limited round of consultation with TWT stakeholders.

- Global, national and regional (TWT Conservancy scale) analysis of the trends and opportunities occurring in relation to leisure preferences, tourism (including cultural tourism) and outdoor recreation.
- Analysis of current tourism and recreation patterns in the TWT Conservancy (including the DMP areas).
- Analysis of the key drivers of these patterns and use of future growth scenarios to illustrate the match between demand and supply of opportunities and investments (now and in the future).
- Clarification of the links between Tongariro, Taranaki, Taupō and Wanganui areas in terms of recreation and tourism opportunities, investment and destination management.
- An overview of key issues/challenges for the future (high level only to flag key issues and opportunities to be explored further with the DMPs).
- Use of selected case studies within New Zealand and elsewhere to illustrate key points of discussion or specific opportunities.

1.3 Methodology

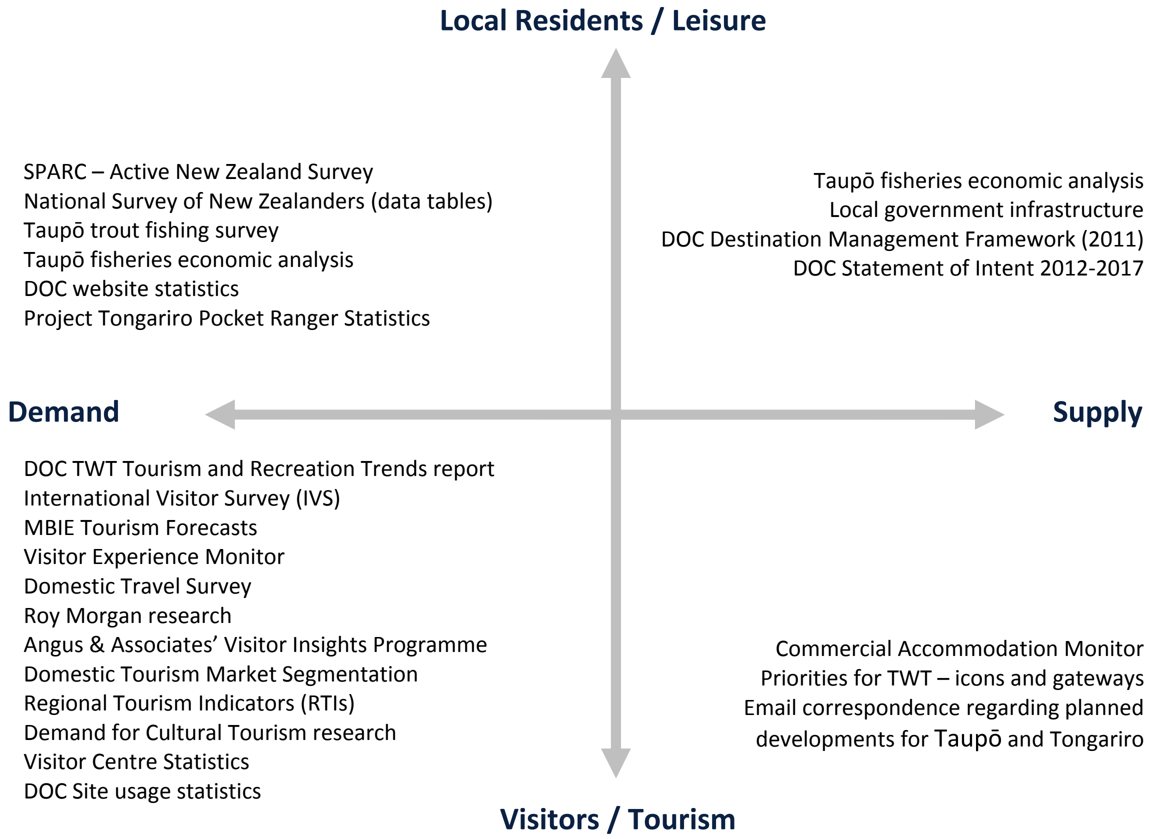
DOC required a secondary research methodology as the primary approach to this project, including collaboration with key Department staff. Our approach has therefore included secondary 'desk research' - reviewing existing datasets and literature as relevant - as well as a selection of in-depth interviews with specialists identified as having specific knowledge of the TWT region and/or other relevant experience.

This report takes a destination view on the TWT conservancy, considering tourism/recreation demand, as well as supply-side trends, issues and opportunities. A high level strategy analysis, including the identification of relevant political, economic, social and technological influences, as well as a strengths/weaknesses and opportunities/threats (SWOT) analysis of the region, were undertaken as key components of this review.

Information for this report was compiled in two ways: through existing research and datasets provided by the Department and, in addition, secondary research identified by Angus & Associates as useful input to the analysis.

Analysis Framework

In order to identify relevant data sets and other information available from a multitude of sources, we began by classifying available research within a two-dimensional matrix, distinguishing sources of demand-related and supply-related information from Visitor/Tourism and Local Resident/Leisure perspectives. The matrix, including the relevant information sources identified, is shown in the diagram overleaf.

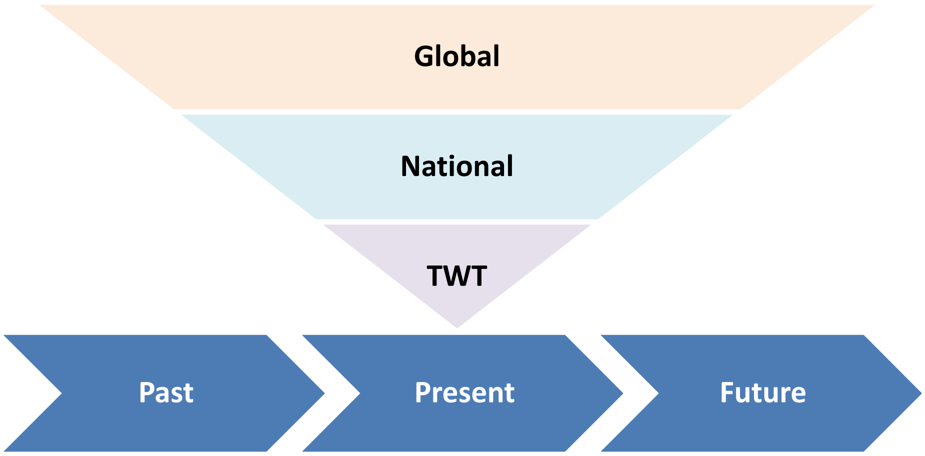


In addition, telephone interviews were conducted with five relevant regional and/or tourism sector experts:

- Warren Furner, Ruapehu District Council (for the Ruapehu/Tongariro perspective)
- Paul Stancliffe White, Venture Taranaki (for the Taranaki perspective)
- Vanessa Freeman and Donna Jarden, Great Lake Taupō (for the Taupō perspective)
- Tim Cossar, Te Puia (for the Rotorua and cultural perspectives, as well as general tourism trends)
- John Barren, Kapiti Island Nature Tours (for the eco-tourism and Maori culture and heritage perspectives)

The interview guide used to structure discussions with these experts is included in this report as Appendix 1.

Following collation, a review and analysis of data was completed to form a view on the broad (global level) trends and how these filtered through to influences apparent at the national and local (conservancy) levels. From here were considered past, present and future trends and implications for the TWT regions, as illustrated overleaf.



Several strategic models were then applied to reach a detailed view on the opportunities, as well as challenges, for the TWT conservancy as suggested by the data and also drawing on our own extensive experience in the tourism sector. These included: -

- To form a view on the destination macro-environment, we completed a PEEST analysis, which takes into account the Political, Economic, Environmental, Social and Technological forces driving global, national and regional tourism and recreation demand.

- To identify and analyse specific opportunities and challenges arising from these drivers of change for the TWT conservancy, we completed a detailed Strengths/Weaknesses – Opportunities/Threats (SWOT) analysis which resulted in an outline of key factors to be considered in the DMP's.

2.0 Executive Summary

The Tongariro Wanganui Taranaki (TWT) conservancy is embarking on the development of a series of strategic planning exercises for Taranaki Maunga, Tongariro National Park, Wanganui National Park and Taupō Moana. The intent of the planning process is to develop a long term strategy for the management of these areas. An important component to these processes will be Destination Management Plans (DMP's).

To assist in developing these individual DMP's, Angus & Associates has prepared this Regional Trends and Opportunities Report. The objective of this report is to provide the Department and other stakeholders with a better understanding of the global, national and regional (TWT Conservancy scale) context for which each of the subsequent DMP's will be developed. The report considers relevant global, national and regional trends in nature-based tourism, leisure preferences, cultural tourism and outdoor recreation, as well as linkages and opportunities between the individual destinations within the conservancy relating to the following objectives:

- Global, national and regional analysis of the trends and opportunities occurring in relation to leisure preferences, tourism (including cultural tourism) and outdoor recreation:
  - The coming years to 2020 should see major shifts in the leisure and tourism environment, reflecting changing consumer values, political forces, environmental changes and the explosive growth of information technology.
  - Domestic and international visitors generally have less time and outdoor experience. They want to engage physically with the outdoors but in a way that is easily accessible in terms of location and commitment.
  - International visitors are interested in cultural experiences that add authenticity to their outdoor engagement in New Zealand.
  - The changing mix of visitor markets, as well as ageing of populations, has implications for the type of tourism products and experiences that will be demanded by visitors.
  - For New Zealand (and the TWT region in particular) a lack of snow cover threatens the viability of the winter ski industry and rising temperatures and UV radiation could decrease visitors' willingness to spend time in the sun.
- Analysis of current tourism and recreation patterns in the TWT Conservancy:
  - Viewed on a national level, the number of overseas tourists visiting New Zealand is growing but visitors are spending less and taking shorter trips.
  - While China is a growth visitor market for New Zealand as a whole, the TWT Conservancy has generally retained visitors from the traditional western markets from America and Europe.
  - There is a definite demand for the kind of outdoor, nature- and heritage-related activities and experiences on offer in the region.
  - At present and for the next five years, the region is better placed to improve and establish its offer to cater to the changing preferences of the 'bulk' traditional western markets, whilst capturing the slowly emerging Free & Independent Traveller (FIT) Asian markets with specialized high end experiences.

- Over the last decade, there has been little change in the volume of nights spent by New Zealanders away from home but the proportion of these nights spent in New Zealand has declined by almost 20%.

- However, domestic visitation of the TWT regions is relatively stable overall. This was also reconfirmed by the regional tourism experts interviewed for this report.

- Due to the variety of DOC products and experiences available in the TWT regions, there is essentially something on offer for everyone. However a focus should be placed on those domestic market segments most interested in the experiences offered by DOC (e.g. nature-based experiences, cultural and heritage attractions). Key segments in this regard will be …

- Analysis of the key drivers of tourism and recreation patterns and use of future growth scenarios to illustrate the match between demand and supply. Domestic and international visitors with less time and outdoor experience seeking short, easily accessible soft adventure activities. Visitors seek "instant immersion", escaping from the everyday through nature-based experiences.

- Destinations that appeal to current visitor demand already exist across the conservancy. Making experiences easy to find, access, choose and purchase (through appropriate partnerships, packaging and marketing) should be a priority.

• Clarification of the links between Tongariro, Taranaki, Taupō and Wanganui areas in terms of recreation and tourism opportunities, investment and destination management:

  - Each area has its own identity in terms of how it is seen by visitors and the experiences available. Tongariro is broadly associated with summer and winter alpine experiences based around the central North Island volcanic zone and in particular the Tongariro Northern Circuit; Wanganui is known for its river-based experiences, including the Wanganui Journey great walk; and Taranaki is seen as offering a mix of experiences centered around Mt Taranaki and its coast line.

  - Wanganui's competitive advantage rests on the River and surrounds. Taranaki has the most difficult access from the main tourist routes and central plateau and has the opportunity to develop iconic draw cards building on Mt.Taranaki and the Mountain/Coast dynamic.

  - While some activities cross the regions (i.e. the Mountains to Sea Cycle Trail), in general the TWT Conservancy is not seen to be linked. This presents an opportunity for parties (i.e. DOC regions, RTOs, local iwi) to work together in the development and promotion of the wider conservancy – creating a platform for regions to be promoted both individually and collectively.

• An overview of key opportunities and challenges for the future:

  - High level priorities for DOC should be to <u>increase demand</u> for experiences in Taranaki/Wanganui through development of 'must do' icons, partnerships, marketing and accessibility and to <u>manage demand</u> for experiences in Ruapehu/Taupō through development of ancillary attractions, partnerships and appropriate marketing support.

  - A core strength of the TWT Conservancy is its diversification of outdoor experiences. This includes experiences that require a range of physical engagement, that suit people with varying interests and levels of fitness/capability, and are available during all seasons. As a result the region can cater to visitors of all skill levels, provides a number of alternatives to activities that are weather dependent and is able to accommodate the interests of entire travel groups.

- There are a number of trends creating opportunities to strengthen visitor engagement within the TWT conservancy. One such trend is that people are increasingly interested in short, easily accessible soft adventure activities, which are already available in the region (e.g. short walks or day hikes amongst other nature based/adventure activities)There are opportunities to market those activities on these characteristics (i.e. short duration, access and soft adventure) or to create new products that match these characteristics.

- The biggest potential restriction on the number of people experiencing the TWT region's destinations is access. This is by virtue of the conservancy's geographic spread and central transportation routes. Not only does the TWT conservancy cover a relatively large area but the majority of its destinations are off the North Island's main highway between Auckland and Wellington.

- There is potential for overuse as destinations become popular. While the appeal of many destinations is that they are not crowded, this has the potential to become compromised as they become more popular. Multiple destinations across the TWT Conservancy should be promoted to help spread visitor numbers and to protect the quality of each visitor's experience.

3.0 Tourism and Recreation Trends Relevant to the TWT Conservancy

Following a 'top down' approach, this section begins with an overview of global trends affecting tourism flows in general, as well as tourism trends in the context of New Zealand and the TWT areas. This section also includes an overview of relevant niche tourism trends and New Zealanders outdoor recreation patterns.

3.1 Demand-Side Trends

3.1.1 Global tourism trends

In the paper 'Megatrends underpinning tourism to 2020', STCRC Tourism institute Australia states that a key element of a successful tourism industry is the ability to recognise and deal with change across a wide range of behavioural, environmental and technological factors and the way they interact. The coming years to 2020 should see major shifts in the leisure and tourism environment, reflecting changing consumer values, political forces, environmental changes and the explosive growth of information technology. No aspect of the industry will remain untouched. The challenge for tourism stakeholders in both the private and public sectors is to account for these changes proactively to achieve and maintain competitive advantage for their organisation.[1]

The major trends influencing change are discussed by a variety of authors, with general agreement underpinning the trends outlined below.

Economic trends [1, 2, 3]

- Globalisation results in easier access across borders and increased tourism flows globally and to New Zealand.
- This also increases global competition from international tourist destinations.
- Potential downturn in key tourism source economies could stifle tourism flows.
- On the upside, much activity in developed economies has shifted to recreation and tourism in a new 'experience economy', where businesses not only provide services but also stage memorable experiences that can be entertaining and/or educational.

Social trends [1, 2, 3]

- Growing incomes and increasing expectations will generate greater discretionary expenditure on travel.
- This demand, in conjunction with other social changes, will affect tourist characteristics and tourism flows.
- An increasing world population, with improved health for older persons and economic growth, will increase the potential market size.
- Growing urbanisation will increase the felt need to engage in tourism to escape and/or to indulge. The greater pressure on time and rising stress levels will lead to a greater emphasis on 'escape' through holidays.

---

[1] Dwyer L., *Megatrends underpinning tourism to 2020: Analysis of key drivers for change*. STCRC 2008
[2] Nordin S., *Tourism of Tomorrow – Travel Trends and Forces of Change.* ETOUR 2005
[3] Richards G., *Tourism Trends: Tourism, culture and cultural routes*. 2011

- Ageing of populations has implications for the type of tourism products and experience that will be demanded by visitors. Other than accessibility and other traditional and more passive tourism products geared towards older travelers, a new generation of 'younger-older' people is emerging from the Baby Boomer generation, demanding more 'active' relaxation such as hiking, shopping, fishing, camping and scenic and historical attractions. These travellers want outdoor experiences with a variety of options.
- Safety issues will be increasingly important in all aspects of life. General economic uncertainty, terrorism and crime, and health scares (including environmental health scares) generate demand for destinations which are deemed 'safe'. New Zealand is thought to be generally well placed in this regard.
- Individuals, particularly from developed countries, have an increasing social and environmental consciousness. They are seeking 'authentic' tourism experiences, and wish to be involved as participants and not spectators.
- Travel and leisure preferences are increasingly forms of self-expression.
- Preferences for sub-sets of unique experiences result in a new type of traveller referred to as the 'experiential' traveler.
- Holidays are becoming more specialised and increasingly carry the need for some kind of educational or cultural experience, as well as other aspects of self improvement, such as health and well being.
- Family holidays will remain important, but greater growth will occur in holidays for the retired and for singles and couples without children.

Political trends [1, 2, 3]

- Political stability will be an important factor for the prosperity of tourism globally.
- Tourism source countries with political restraints on economic advances will generate fewer travelers.
- Uncertainty, conflict and terror will constrain tourism flows overall but can also benefit destinations which are perceived to be 'safe'. Therefore, a destination image based on safety is increasingly important.
- The destination as a whole, and individual operators, will need to sustain this sense of safety and security.
- The political and economic 'opening' of China will transform international tourism flows to New Zealand.
- Middle East conflicts will substantially increase fuel costs of travel.
- Biosecurity will be needed to protect the destination environment.
- Populations exploring their own identities will create opportunities to develop cultural and natural tourism experiences.

Environmental trends [1, 2, 3]

- The natural environment and climate conditions will become increasingly important in determining the viability and attractiveness of a region as a tourist destination.
- The view on tourism has shifted toward the part that tourism can play in reducing environmental pollution and demands on resource use.
- Impacts of climate change and warming trends (including sea-level rise, changes to ocean currents and precipitation patterns) may impact demand and travel flows.
- Rising populations and economic development are affecting the availability of natural resources and habitats.

- Fossil fuel-based energy will become more expensive, affecting global travel patterns and cost of travel to New Zealand.
- For New Zealand (and the TWT region in particular) a lack of snow cover threatens the viability of the winter ski industry and rising temperatures and UV radiation could decrease visitors' willingness to spend time in the sun.

Technological trends [1, 2, 3]

- Technological developments create opportunities as well as threats for the tourism sector.
- Faster, more comfortable, transport options increase the accessibility of destinations worldwide (as part of which low-cost carriers are facilitating more frequent travel and opening up new markets).
- Increasing development and use of information and communication technology (ICT) will shape interactions between tourism operators and tourism markets.
- ICT will become the most important management tool in achieving results and competitiveness.
- New internet and networking technologies are agents of the consumer. This relates especially to the gathering of tourist information and booking channels.
- The smartest e-destinations will embrace all information and communication technologies to assist visitors.
- E-communities will direct trends and 'advertise' for the destination/operator (positively or otherwise).
- Knowledge is increasingly essential to the competitive advantage of any organisation.

3.1.2 International Visitor Trends

3.1.2.1 International Tourism Trends (New Zealand)

Viewed at the national level, the number of overseas visitors to New Zealand is growing but visitors are spending less and taking shorter trips. The mix of source markets is also changing with increasing numbers of visitors from China and Australia and a decline in some of New Zealand's traditional long-haul markets (including the UK, USA, Japan and South Korea). Even though there are recent signs of improvement, these trends are forecast to continue over the next five years. Length of stay will continue to vary by market, with traditional long haul markets staying much longer than their Asian and particularly Chinese counterparts. [4]

Visitor Arrivals to New Zealand [5, 6]

The number of international visitor arrivals to New Zealand has grown steadily over the past 10 years to reach 2,616,929 international arrivals in YE April 2013. The mix of visitors by origin has changed significantly over this period with a number of key trends emerging. These include: -

- Australia is New Zealand's largest visitor market and continues to grow. Australian arrivals increased to 1,171,504 in YE April 2013.

---

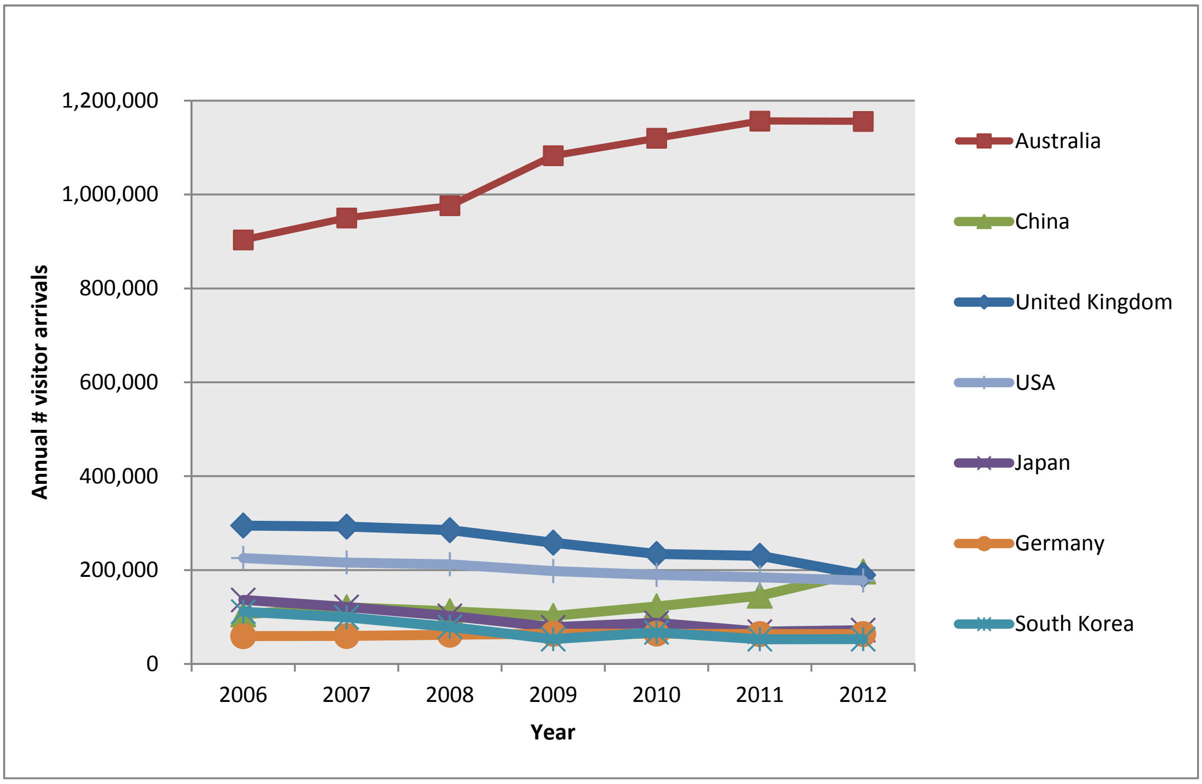
[4] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

[5] Statistics New Zealand. *International Visitor Arrivals Data*.

[6] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

- China has emerged to become New Zealand's second largest visitor market. Chinese arrivals have grown just under 90% over the past 7 years to reach 216,832 in YE April 2013. In 2006, China was New Zealand's 6th largest market.
- Visitor arrivals from New Zealand's traditional long-haul markets have declined sharply over the 5-year period to 2012 but there are early signs of a recovery in 2013: -
  - USA holiday arrival growth 2.4% YE April 2013
  - Germany holiday arrival growth 3.0% YE April 2013
  - Japan holiday arrivals growth 12.9% YE April 2013
  - UK holiday arrivals still declining however (-21.0% YE April 2013)

Annual Visitor Arrivals from Key Markets 2006 – 2012 (Source: Statistics New Zealand)



Length of stay in New Zealand [7,8]

The mean length of stay for overseas visitors to New Zealand was 19.1 days in 2012. However, the median length of stay was 9 days. The median figure is considered to be a more useful indicator since this measure is less affected by long-stay visitors such as working holiday travelers.

Length of stay varies widely between different international visitor markets, with Chinese visitors staying the shortest (4 days), and other Asian and short haul Australian visitors staying for up to a week. The traditional long haul visitors from Europe and USA stay the longest, as shown in the table below.

---

[7] Ministry of Business, Innovation and Employment. *International Visitor Survey Data*.
[8] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

Length of Stay for Key Markets in 2012 (Source: International Visitor Survey)

Country	Mean Stay (days)	Median Stay (days)
Australia	10.5	7
China	16.0	4
United Kingdom	29.9	20
United States	18.4	10
Japan	18.4	7
Germany	50.1	24
South Korea	20.2	6

Median (and mean) length of stay has decreased by one day since 2010 and it is anticipated that this trend will continue over the coming years. A decrease in length of stay means that visitors tend not to travel as far from the main entry points to New Zealand, such as Auckland or Christchurch, and will be less likely to visit areas not directly linked to major attractions and the main tourist routes.

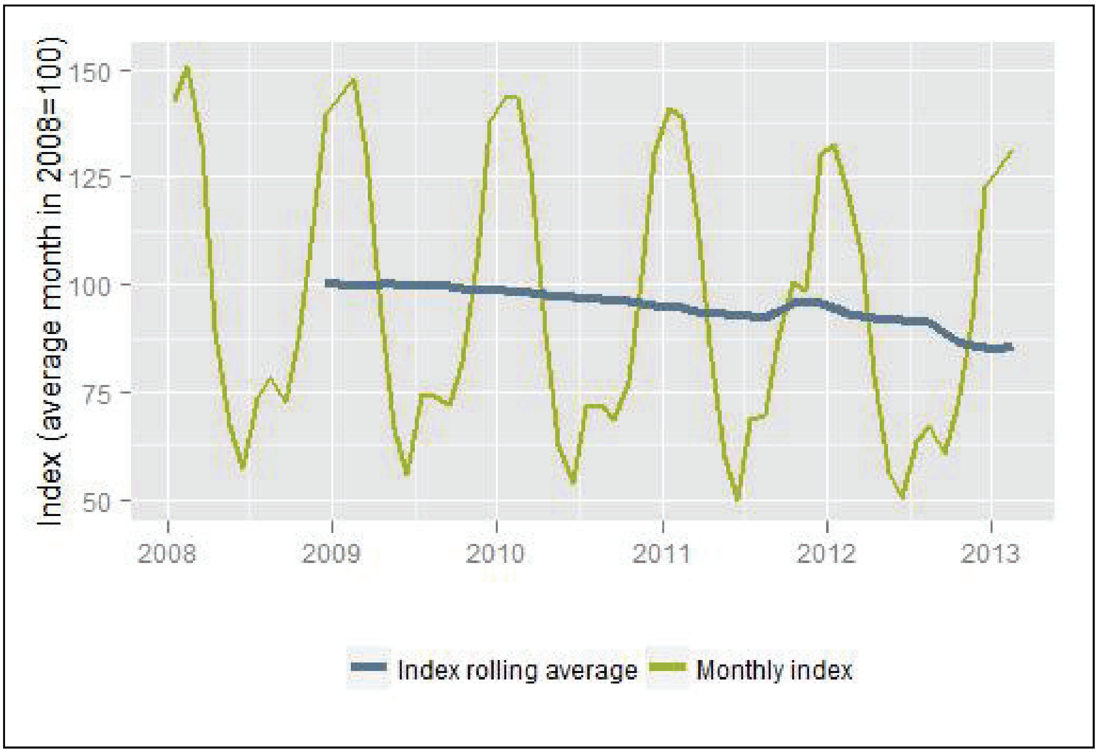
Visitor Expenditure [9,10,11]

The Ministry of Business, Innovation and Employment (MBIE) provides trend data for expenditure through its Regional Tourism Indicators programme. In the year to February 2013, international visitor spending was 14% below the 2008 level. A trend of declining international visitor expenditure has been apparent since 2008 and this impacts the New Zealand tourism industry in all regions.

Refer to chart overleaf.

9 Ministry of Business, Innovation and Employment. Regional Tourism Indicators.
10 Harbrow M. Visitor Trends Report. Department of Conservation 2013
11 Ministry of Business, Innovation and Employment. *International Visitor Survey Data*.

International Tourism Expenditure 2008 – 2013 (Source: MBIE, Regional Tourism Indicators)



Average expenditure per person (excluding international airfares) was $2300 in 2012. The corresponding median was $1400. However, average expenditure varies significantly by source market, as shown in the table below.

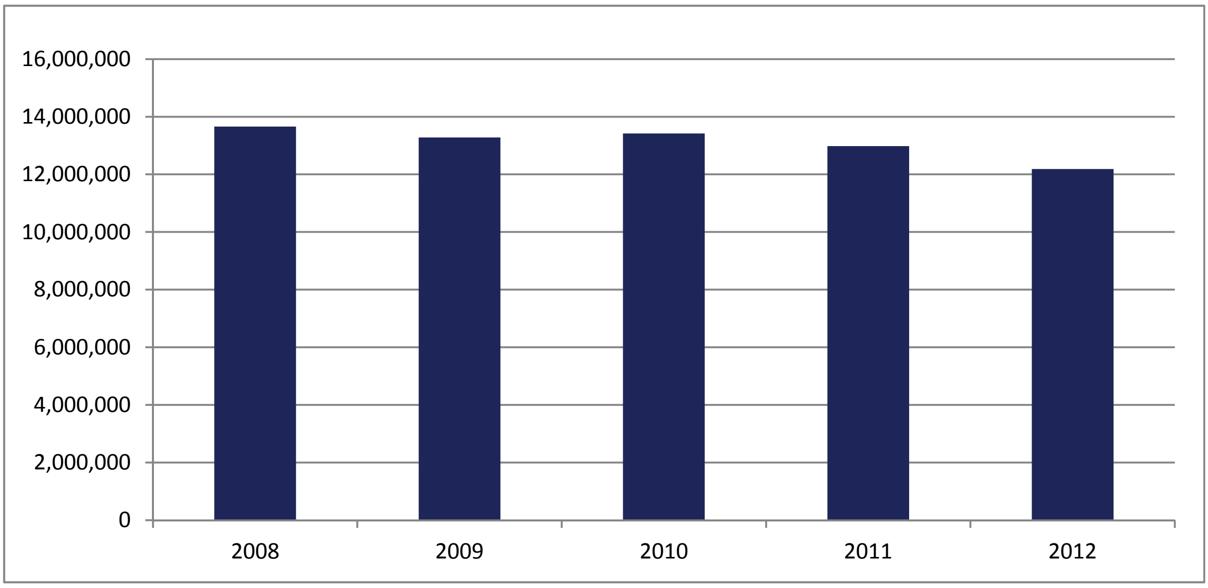
Spending in New Zealand for Key Markets (Source: International Visitor Survey)

Country	Average Spend	Median Spend
Australia	$1500	$1100
China	$3600	$2000
United Kingdom	$2700	$1900
United States	$2600	$1700
Japan	$4100	$2600
Germany	$3200	$2600
South Korea	$3100	$1800

Commercial Guest Nights in New Zealand [12,13]

As an additional indicator of overall tourism activity, the Commercial Accommodation Monitor (CAM) confirms the general trend towards shorter stays in New Zealand. Despite the increase in the number of visitor arrivals, commercial guest nights declined by 10.8% between 2008 and 2012.

International Commercial Guest Nights 2008 - 2012 (Source: Commercial Accommodation Monitor)



International Tourism Forecasts [14]

The trends relating to international visitor markets outlined above are forecast to continue in the short to medium term. Forecasts released in November 2012 by MBIE show total visitor numbers increasing by 28% in the five years to 2018, with a changed mix of visitors. Traditional long haul markets such as the UK, USA and Japan are expected to continue to decline, with corresponding growth in the Australian and Chinese markets.

Visitor spending is predicted to return to pre-global financial crisis levels by 2018 and increase by 9%. Average daily expenditure per person is expected to remain stable at $112 but the forecast decline in average length of stay by 15% to 16.9 days (influenced by a shift towards more short-haul trips from Asia and Australia) will result in a lower total spend and economic impact of international visitors to New Zealand's regions.

12 Ministry of Business, Innovation and Employment. Commercial Accommodation Monitor Data.
13 Harbrow M. Visitor Trends Report. Department of Conservation 2013
14 Ministry of Business, Innovation and Employment. *Tourism Forecasts 2012-2018*.

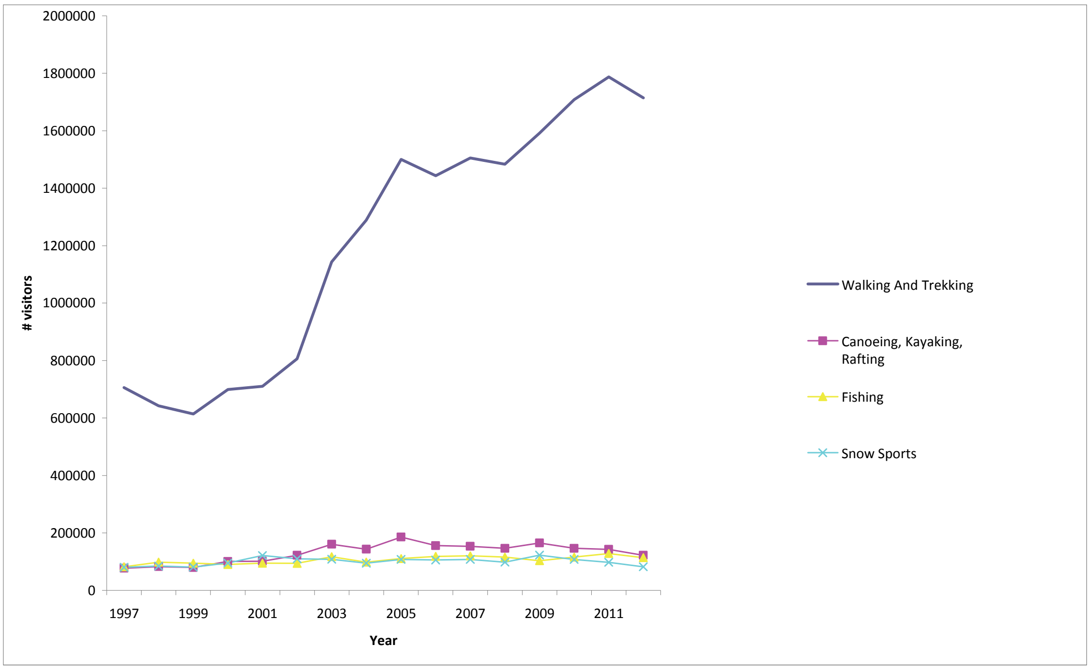
Activities Undertaken by International Visitors [15,16]

Key trends in international visitor participation in activities captured in the IVS and relevant to DOC and the TWT conservancy are as follows: -

- Participation in walking and trekking has increased strongly over the past 10 years. In 2012, more than 1.7 million international visitors participated in this activity during their stay in New Zealand. Walking and trekking is the third most popular activity for international visitors (behind shopping and dining) based on reported participation.
- Demand for a number of more passive experiences available on public conservation land - such as scenic and natural attractions, and use of lookouts and viewing platforms - has also increased.
- Land-based sightseeing declined sharply between 2006 and 2009. While the number of international visitors reporting participation in land-based sightseeing activities is growing again, the 2012 level remained 25.9% below peak levels of participation recorded in 2005.
- Interest in volcanic and geothermal attractions is also fallen below the peak recorded in 2005 but is now relatively stable again.
- Interest in cultural attractions has been declining since 2005, whilst interest in heritage attractions grew to reach a peak in 2010. The past two years have seen a drop in heritage-related visitation again but whether indicative of a longer term decline remains to be seen.

Participation trends as they relate to key active and more passive visitor experiences relevant to DOC and the TWT region may be seen in the charts below and overleaf.

Annual participation in selected active outdoor recreation activities by international visitors (Source: International Visitor Survey)

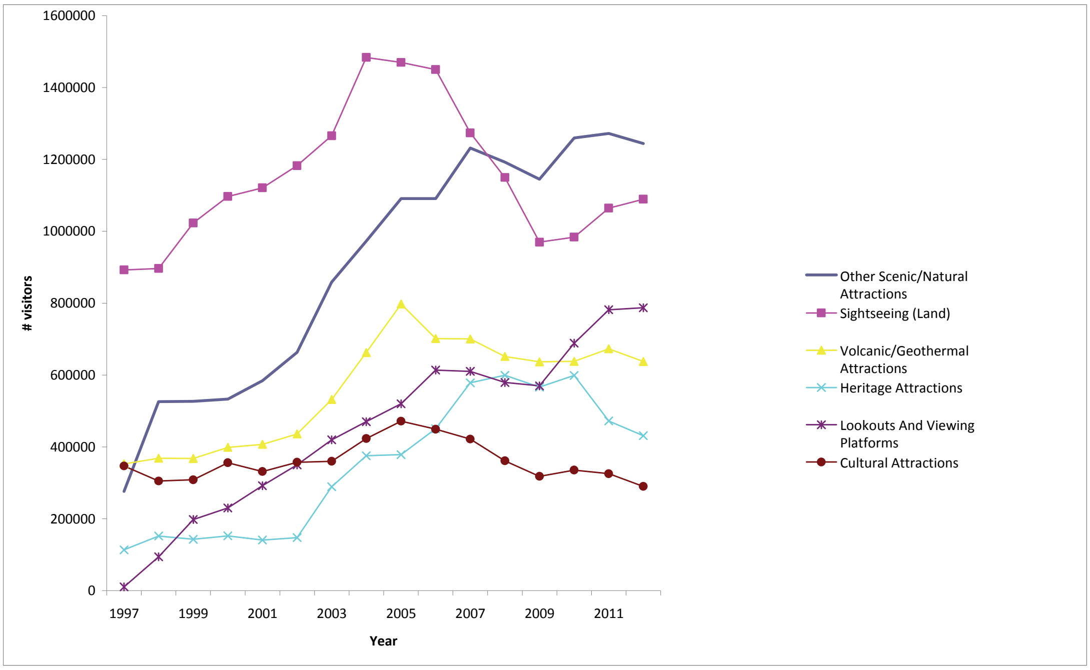


---

15 Ministry of Business, Innovation and Employment. *International Visitor Survey Data*.

16 Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

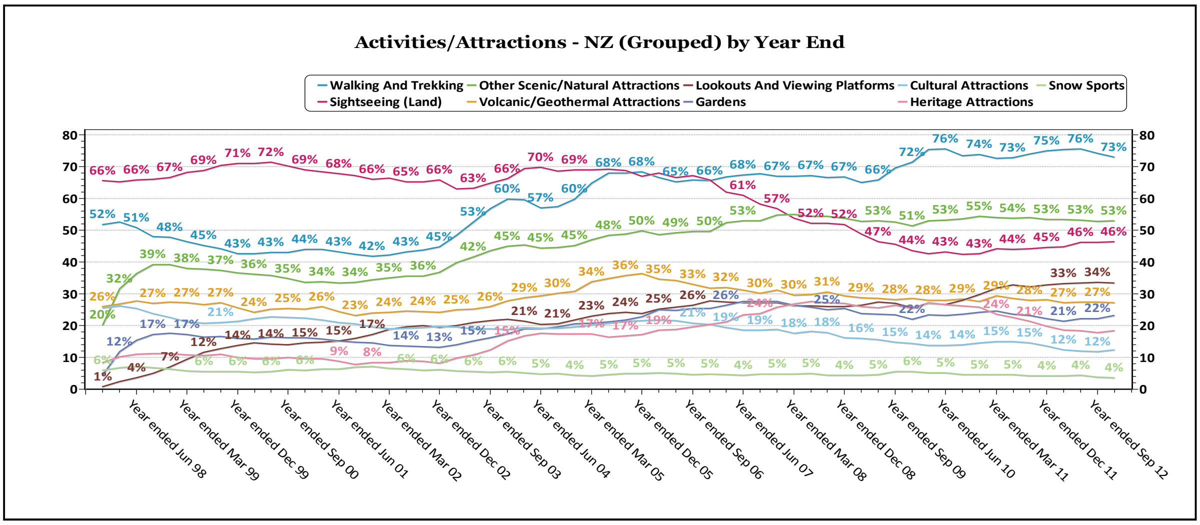
Annual participation in selected passive recreation activities by international visitors (Source: International Visitor Survey)



Demand for Park and Nature-Based Activities [17]

Mirroring trends in nature-based activities/experiences on a global scale, interest in nature-based **activities** in New Zealand is not declining although the type of activities/experiences sought is shifting gradually in line with changing demographics, psychographics and trip characteristics (with growing demand for short- or day-walks and other easily accessible activities and experiences).

However, demand for more **passive** natural experiences such as sightseeing is indeed declining. The following chart shows this dynamic. Note that this trend is apparent in relation to all main geographic markets, including China, although here it is less pronounced than in western markets.



17 Ministry of Business, Innovation and Employment. *International Visitor Survey Data*.

Walking and trekking has increased in popularity over time and remains the third most popular activity for international visitors behind shopping and dining. Demand for experience of volcanic and geothermal attractions has not changed over the last five years.

Analysis of participation in four major nature-based activities, as tracked in Tourism New Zealand's Visitor Experience Monitor (namely tramping and hiking, visits to National Parks, scenic bush walks and scenic drives) also shows the changing nature of New Zealand's international tourism markets.

The declining UK and USA markets have high levels of participation in these four activities, while growth is occurring in New Zealand's largest tourism markets (Australia and China) which are characterised by lower levels of participation in these activities. Should present trends in the composition of New Zealand's international visitor mix continue, we would expect participation in nature based experiences and use of public conservation land to decline overall.[18]

While lower levels of participation are apparent amongst Australian and Chinese visitors, it does not appear that this is because these markets lack **interest** in the outdoors. Instead there is significant latent demand; i.e. interest that is not presently flowing through to participation. This would suggest that there is an opportunity to grow the number of Australian and Chinese visitors using public conservation land if their needs and present barriers to participation are understood and if the right opportunities are provided in the right places[19]. It is noted that one of the most significant of these barriers at present is likely to be length of stay.

3.1.2.2 International Tourism Trends (TWT Conservancy)

The trends identified above are considered to have long term implications for all New Zealand regions, and particularly those regions which are most difficult to access from the major international gateways (Auckland and Christchurch) and traditional touring routes.

However, upon closer analysis and based on discussions with the experts consulted for this report, it appears that the TWT regions are currently feeling less impact from the shifts in market composition and visitor behaviour than other regions. Indeed, traditional western markets are steady or continue to grow in the TWT regions and there remains definite demand for the kind of outdoor, nature and heritage-related activities and experiences on offer in the region. [20]

The neighbouring Rotorua region has embraced the emerging Chinese and Asian markets in its destination marketing and product development and this can be seen in a growing number of Chinese visitors to the region. However, the typically short-term duration of visits by the Chinese/Asian traveller prevent Rotorua acting as an effective 'feeder' region for TWT.

(Furthermore, the TWT regions are seen by stakeholders to have little to offer the current (largely group) Chinese market and it is felt that much effort would be required by TWT to develop this market: firstly, to build the necessary relationships, and then to implement specialised marketing activities and appropriate product development. Given this, stakeholders believe that at present (and for the next five years), the TWT region would be better to focus on improving its offer to cater for the changing preferences of the 'bulk' traditional western markets, whilst capturing FIT Asian markets as these emerge - with specialized high end experiences.)

[18] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

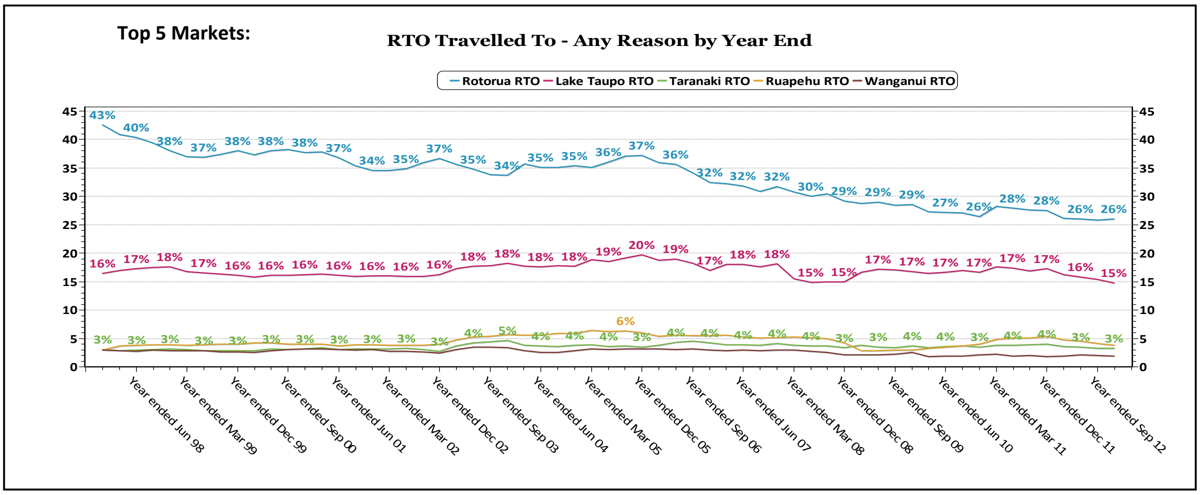
[19] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

[20] Interviews conducted with Ruapehu District Council, Venture Taranaki, Great Lake Taupō RTO, Te Puia, Kapiti Island Nature Tours.

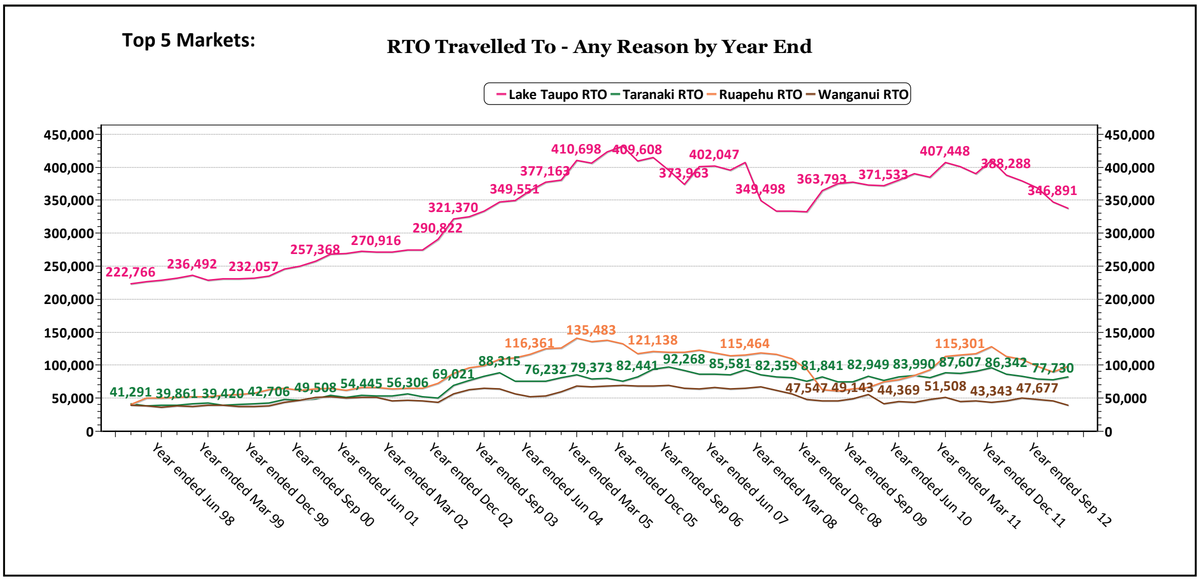
International Visitors [21]

The following International Visitor Survey (IVS) charts show the proportions of selected main markets travelling to the TWT regions, as well as to Rotorua (by way of comparison).

While visitor numbers overall have been declining slowly for the US and UK markets since 2006, New Zealand has seen large increases in visitor numbers from Australia, as well as China – with the net effect being some modest incremental growth. However, analysis of visitation to selected RTO's (by New Zealand's top 5 markets) shows that Rotorua has experienced a clear downward trend in visitation overall, whilst the TWT regions have remained relatively steady.

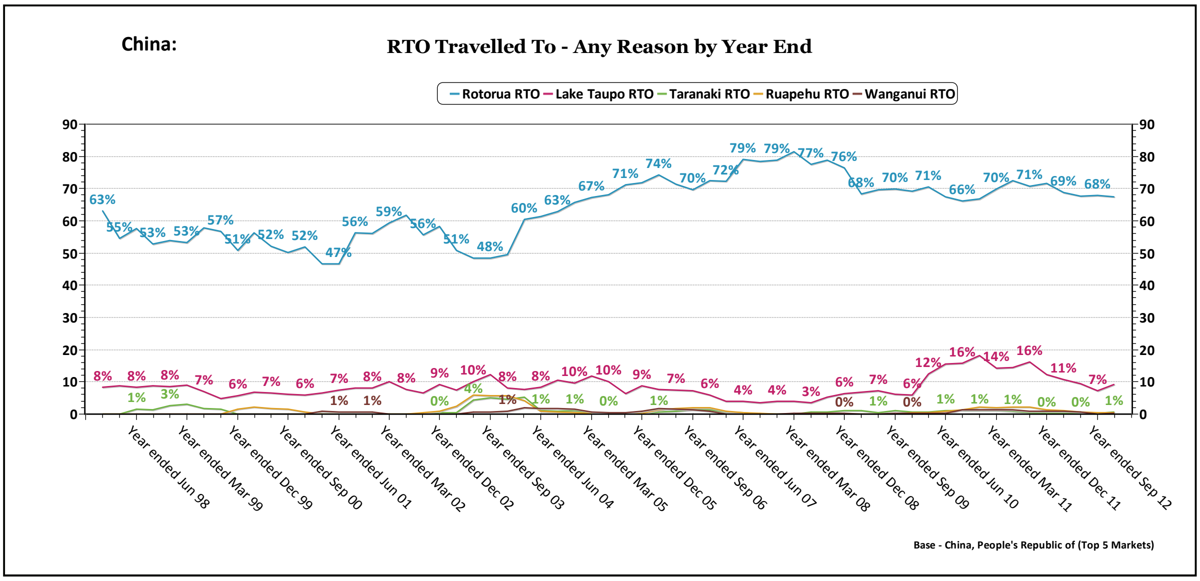


When the TWT RTO visitation numbers are compared, it is clear that Taupō receives the largest share of international visitors. For all regions, trends have fluctuated to some degree but are relatively stable over the last 10 years. This mirrors feedback received from local tourism experts: that the traditional main markets still remain strong in the TWT regions and continue to represent potential.

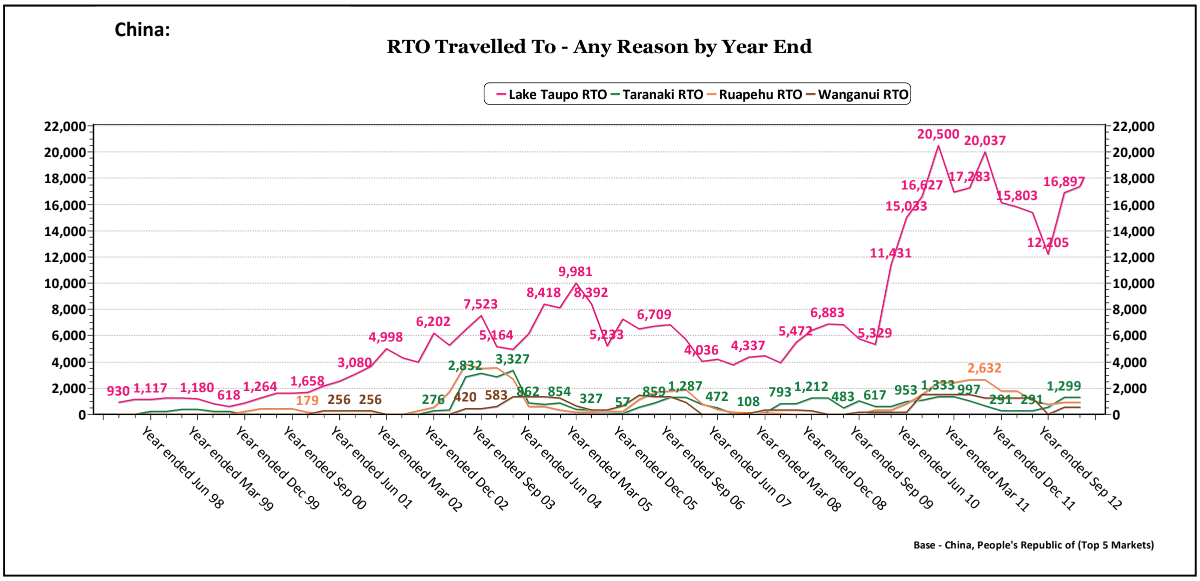


[21] Ministry of Business, Innovation and Employment. *International Visitor Survey Data*.

In the Chinese market, some growth is apparent in the Rotorua RTO Region.



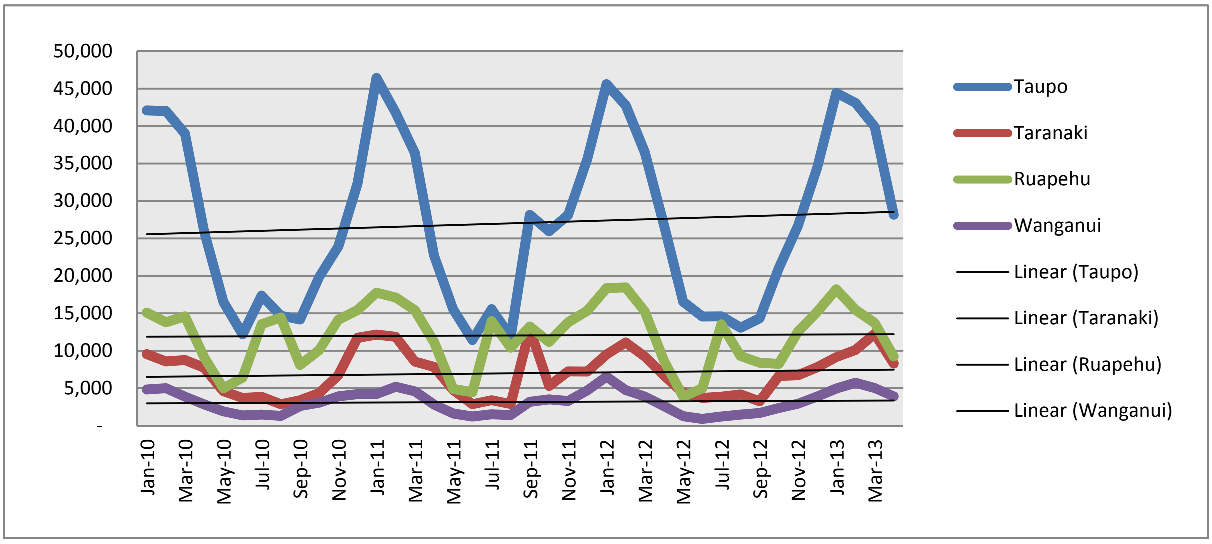
However, within the wider TWT region, Taupō is the only RTO region which has seen some significant increase in visitation by Chinese travelers (refer to chart below). Please note that trends shown for the TWT region RTO's should be viewed with caution due to very small sample sizes.



Visitor Nights [22]

Data drawn from the Commercial Accommodation Monitor (CAM) also points to overall stability in international guest nights in the TWT regions. Only Taupō has seen an increase in nights over time, and Taupō also accounts for the largest share of nights within the wider TWT region.

International Guest Nights to YE March 2013 (Source: Commercial Accommodation Monitor)



Visitor Expenditure [23,24]

The Regional Tourism Indicators aggregate and analyse data on the number and value of electronic transactions made by international visitors (identified by card origin). Data is analysed by country to indicate the size of the international market in each region (Table 1 overleaf). The Regional Tourism Indicator data shows that: -

- Australia is the largest international market in all four RTO areas. Spending by Australian visitors has increased in all RTO areas in the region since 2008.
- Tourism in the TWT region is vulnerable to the decline in visitors from the UK and USA which is being experienced nationally.
  - Spending by UK visitors decreased in all four RTO areas by between 22% and 41% from 2008 to 2012.
  - Spending by American visitors dropped most sharply in Taupō (-30%) and Wanganui (-22%). However, there were small increases in spending recorded in both Ruapehu and Taranaki.
- Spending by Chinese visitors has increased substantially in two RTO regions but the overall level of activity from this market is still very small. Other markets, including Canada and a number of European markets, are currently more significant for the Tongariro Wanganui Taranaki region based on their expenditure.

- Overall spending by international visitors since 2008 is down 16% in Taupō, down 15% in Wanganui and down 6% in Ruapehu. Spending has increased by 6% in Taranaki.

[22] Ministry of Business, Innovation and Employment. *Commercial Accommodation Monitor Data.*
[23] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013
[24] Ministry of Business, Innovation and Employment. *Regional Tourism Indicators.*

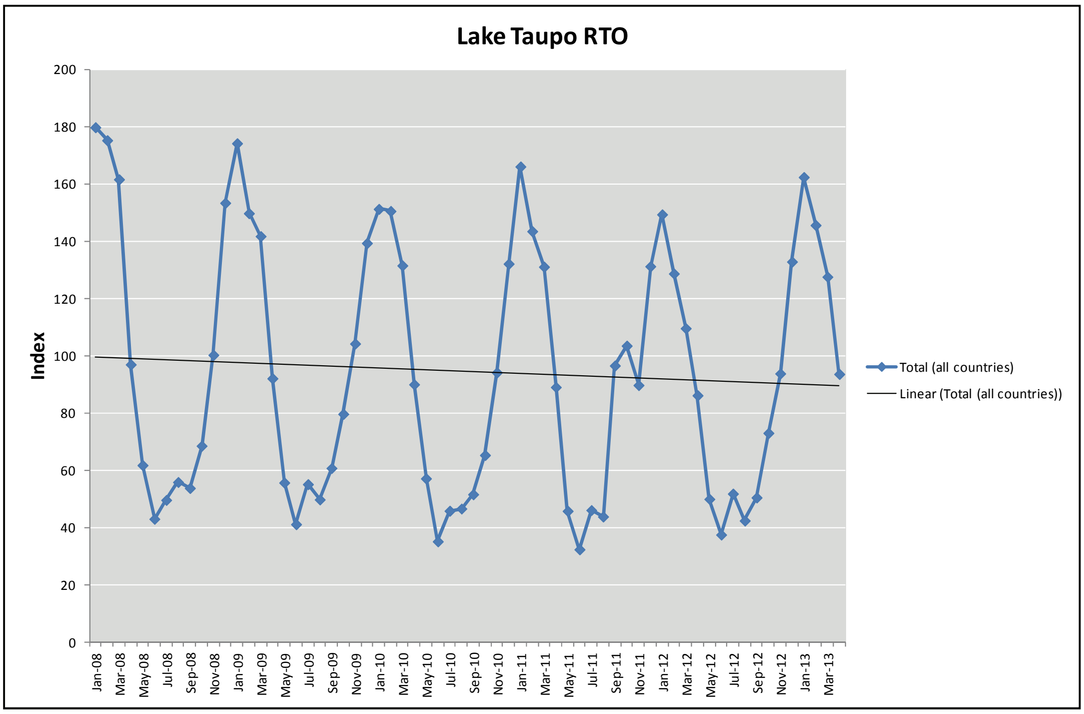
Table 1: Percentage of international tourist transactions from key markets by RTO 2012 (Source: Regional Tourism Indicators)

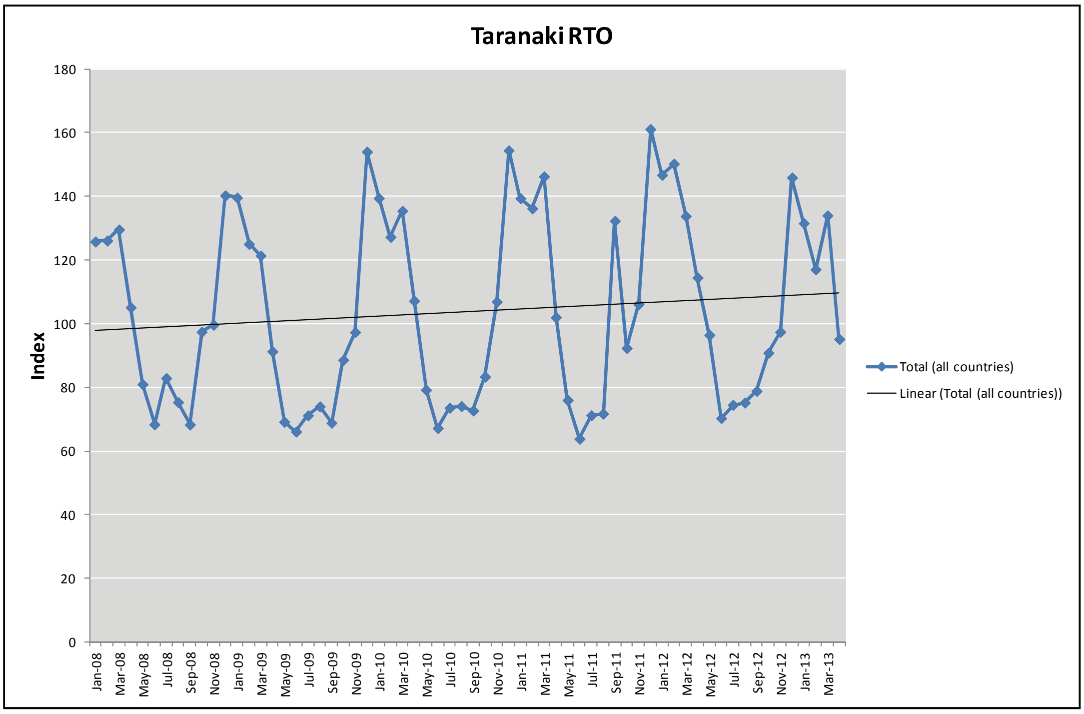
Country	Australia	China	UK	USA	Japan	Germany	South Korea	Total transactions
Taupō	32.1%	0.7%	17.6%	12.6%	1.2%	7.3%	0.4%	219,443
Ruapehu	26.7%	0.4%	14.4%	11.6%	0.8%	11.9%	0.4%	52,601
Taranaki	45.8%	0.4%	14.4%	10.2%	0.7%	5.0%	0.2%	112,254
Wanganui	42.9%	1.0%	15.0%	9.6%	1.0%	7.9%	0.3%	32,282

Table 2: Change in average monthly visitor spend from key markets by RTO between 2008 & 2012 (Source: Regional Tourism Indicators)

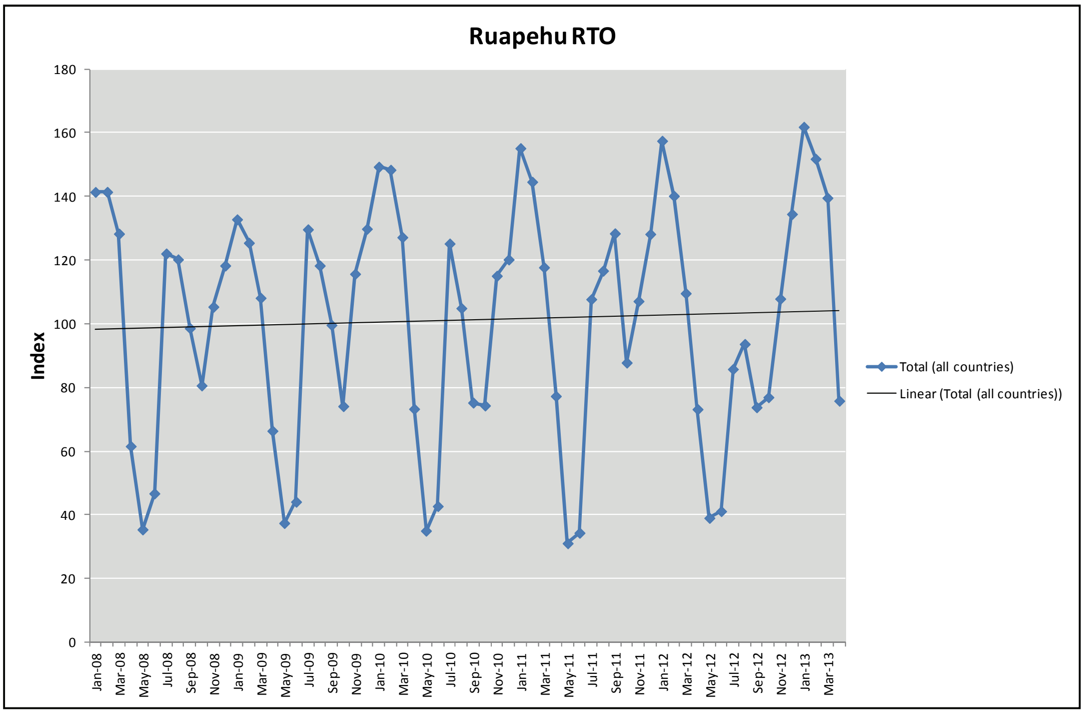
Country	Australia	China	UK	USA	Japan	Germany	South Korea	Total transactions
Taupō	+15%	+176%	-43%	-30%	+4%	-12%	-7%	-16%
Ruapehu	+4%	No data	-37%	+1%	-33%	-4%	-36%	-6%
Taranaki	+32%	+60%	-22%	+6%	+52%	-7%	No data	+6%
Wanganui	+31%	No data	-41%	-22%	-65%	-31%	No data	-15%

These trends can be seen further in the charts below and overleaf, with expenditure in Taupō declining over time and expenditure in Taranaki increasing.

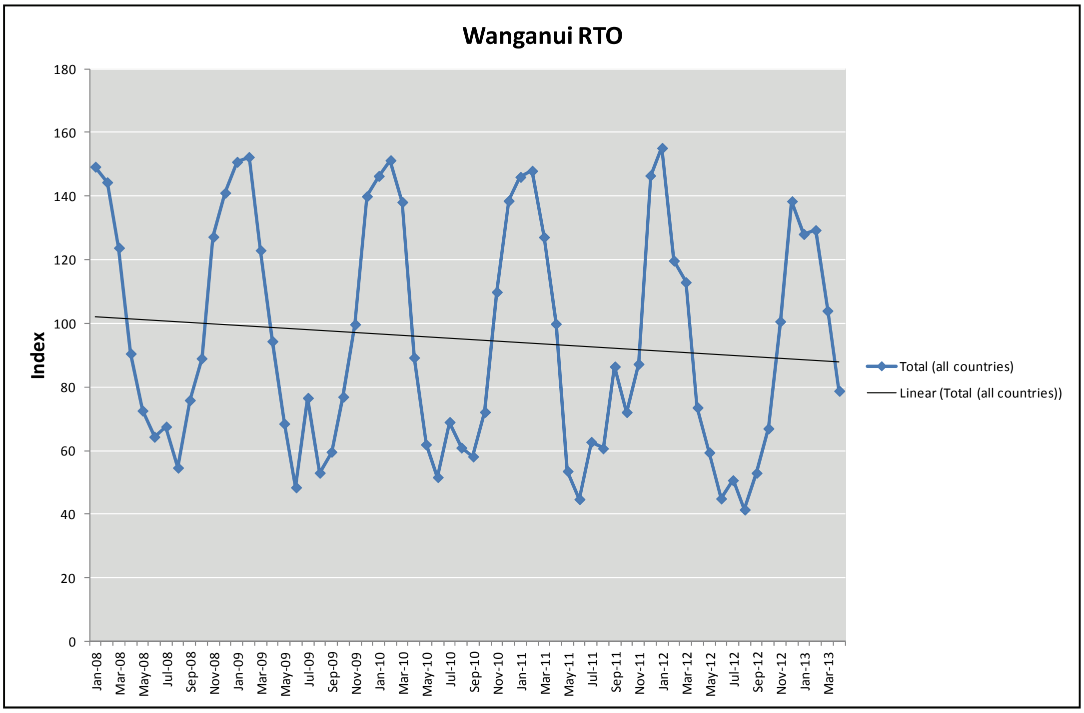




Ruapehu has also seen growing expenditure by international visitors (although, in the domestic market, the trend is one of decline). The two markets also display clear differences in seasonality. Whilst Ruapehu experiences its peak international expenditure during summer, domestic peak season expenditure takes place during the winter months.



A declining trend in international visitor expenditure is also apparent in the Wanganui RTO region.



3.1.3 Domestic Market Trends

3.1.3.1 National Perspective

In 2012, domestic tourism contributed approximately $13.8 billion to the New Zealand economy, equating to more than half (59%) of the total economic contribution made by the tourism industry.

The significance of the domestic tourism market was highlighted in the New Zealand Tourism Strategy 2015 (NZTS 2015). Beyond immediate economic impact, the Strategy noted that, by stimulating demand for products and services within the domestic market - and building the capability required to meet this demand - New Zealand's tourism operators would be better equipped to deliver a world class experience to international visitors as well.

Number of Trips [25,26,27]

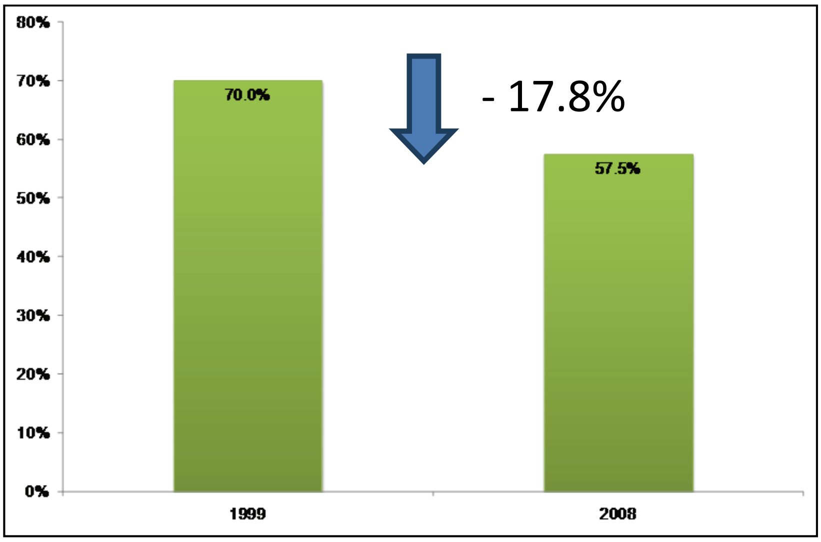
Over the last decade and more, there has been little change in the volume of nights spent by New Zealanders away from home but the proportion of these nights spent in New Zealand has declined significantly. For example, in the 10 years to 2008, this decline resulted in a loss of domestic market share in the order of almost 20%.

---

[25] Ministry of Business, Innovation and Employment. *Domestic Tourism Market Segmentation Data*.

[26] Ministry of Business, Innovation and Employment. *Domestic Travel Survey Data*.

[27] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013



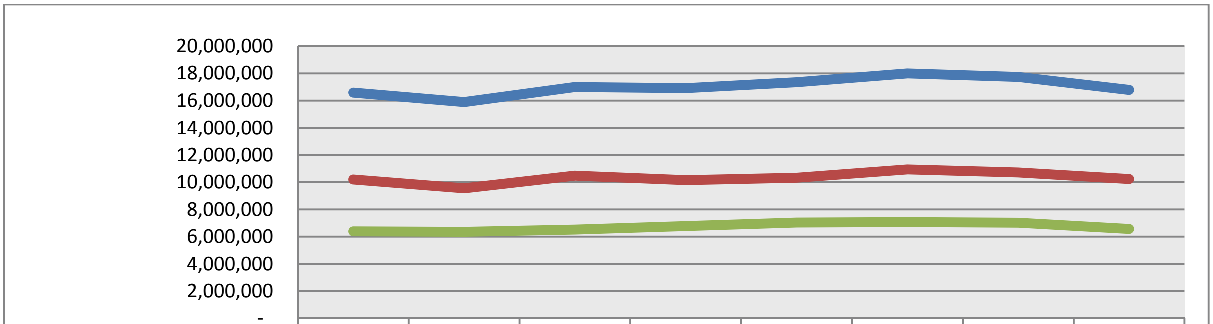
The 2009/2010 Domestic Tourism Market Segmentation undertaken by Angus & Associates for the then Ministry of Tourism confirmed that almost half of all adults take at least one short break (up to 5 nights) in New Zealand each year, but just one-quarter take a longer holiday (of 6 nights or more). It was interesting to note that a similar proportion took at least one international holiday each year.

When frequency of trips is taken into account, it became apparent that the average New Zealander also took a substantial number of day trips in any given four week period, most often for the purpose of shopping (an average 2.8 trips every 4 weeks), business (2.5 trips) or to visit friends/family (2.4 trips).

Domestic overnight trips were relatively less frequent, with the average New Zealander taking just 0.7 trips for business each year, 1.0 trip to attend an event held by family/friends and 2.5 trips for a break or holiday. The bulk of this more discretionary leisure travel took the form of short breaks (defined as 5 nights or less).

No further trend data is available for review however data from the Domestic Travel Survey (DTS) shows a relatively consistent trend in the number of domestic trips taken over time, with the number fluctuating between around 16 million and 18 million for each of the last two years but with another downward tendency observed during the second half of 2012.

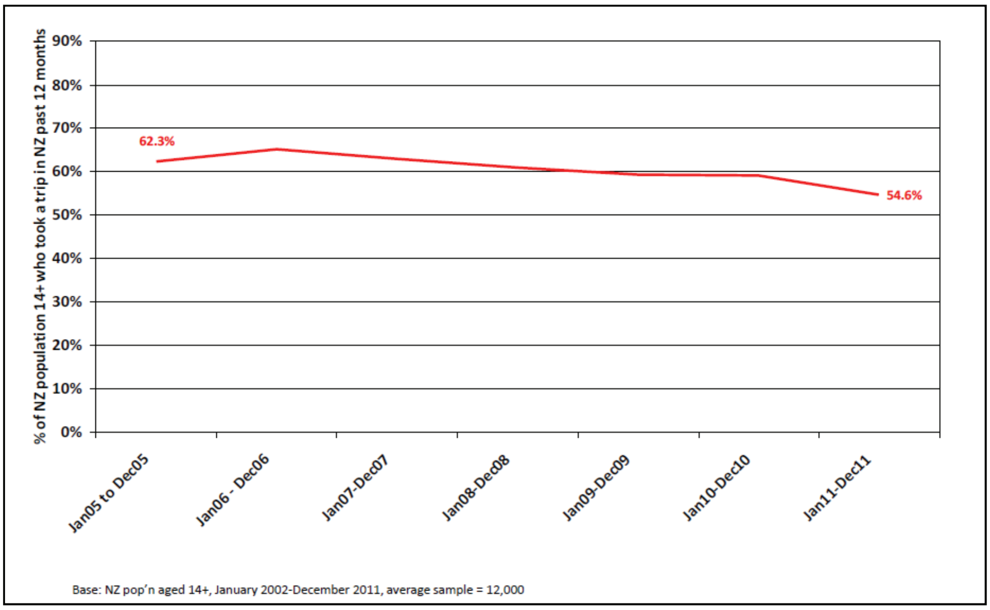
Domestic Holiday Trips to YE December 2012 (Source: Domestic Travel Survey)



	Year ended Mar 11	Year ended Jun 11	Year ended Sep 11	Year ended Dec 11	Year ended Mar 12	Year ended Jun 12	Year ended Sep 12	Year ended Dec 12
Total Number of Trips	16,585,79	15,893,17	16,994,52	16,915,21	17,350,86	18,000,66	17,735,40	16,786,15
Day Trip	10,198,79	9,545,210	10,483,29	10,144,56	10,321,99	10,935,35	10,718,75	10,227,93
Overnight Trip	6,387,001	6,347,969	6,511,233	6,770,657	7,028,870	7,065,306	7,016,653	6,558,219

While no longer term DTS data is available, information from Roy Morgan Research points to an overall decline in domestic holiday travel for the period from 2006 to 2011. The chart overleaf shows that the proportion of New Zealanders taking holidays within New Zealand has decreased by 7.7% over this period.

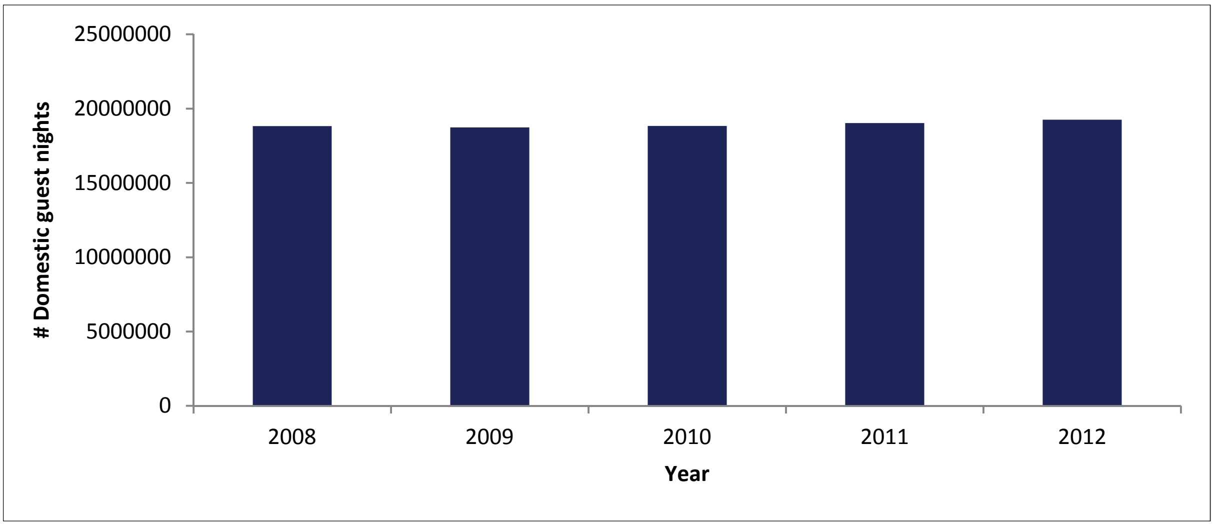
Percentage of New Zealanders taking Holiday Trips in New Zealand 2005 – 2011 (Source: Roy Morgan Single Source Database)



Commercial Guest Nights[28]

Data from the Commercial Accommodation Monitor shows that the total number of domestic guest nights across New Zealand increased by 2.3% from 18,823,409 in 2008 to 19,251,820 in 2012.

Domestic guest nights 2008 – 2012 (Source: Commercial Accommodation Monitor)

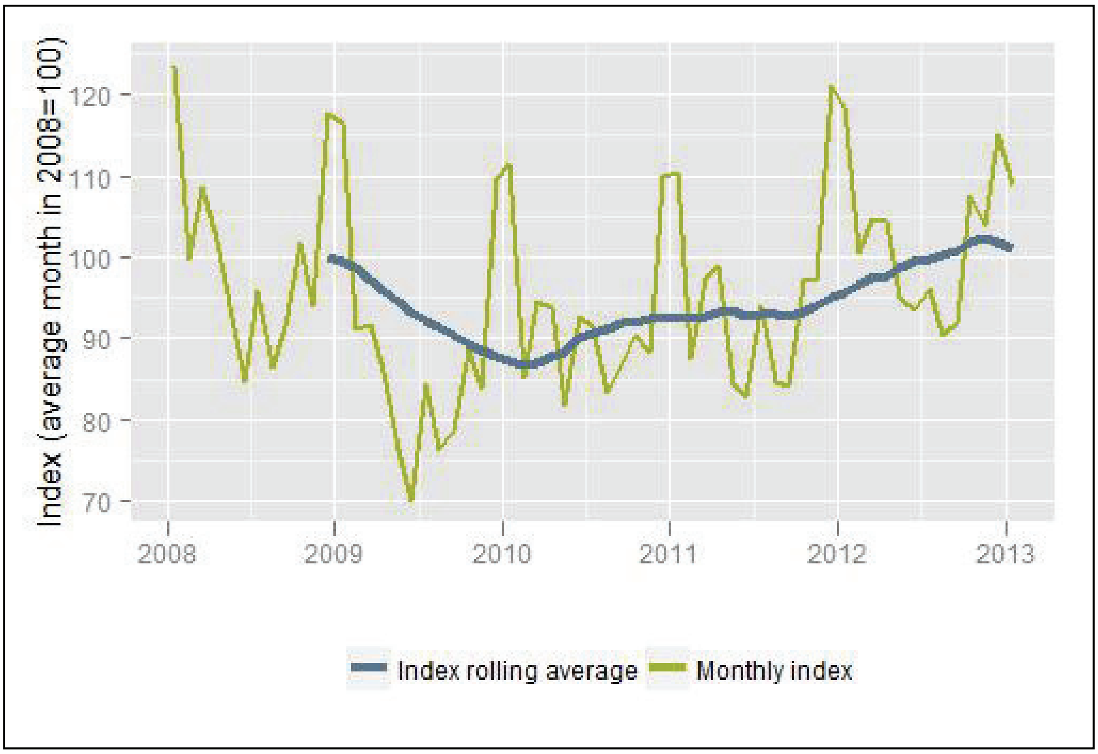


28 Ministry of Business, Innovation and Employment. *Commercial Accommodation Monitor Data.*

Expenditure

Domestic tourism expenditure has recovered in the year to January 2013, following a downturn in 2010. Regional Tourism Indicators (RTIs) data shows a 10% increase in expenditure on 2008 levels.

Domestic tourism spending 2008 – 2013 (Source: Regional Tourism Indicators)



Activities [29]

Walking/trekking remains one of the most popular activities undertaken by New Zealanders on domestic trips. Niche activities such as snow sports and cycling have also shown strong growth in recent years.

Number of trips by New Zealanders involving selected active recreation activities (Source: Domestic Travel Survey)

Activity	YE Dec 2011	YE Dec 2012	% change
Walking and trekking	4,739,845	4,780,124	+1
Swimming	1,908,711	1,684,902	-12
Fishing	1,536,556	1,417,860	-8
Hunting/shooting	470,597	413,085	-12
Snow sports	345,992	424,546	+23
Cycle sports	448,951	548,057	+22

[29] Ministry of Business, Innovation and Employment. *Domestic Travel Survey Data*.

More passive outdoor and nature-based activities have also increased in popularity over the last two years. However fluctuations are present over the longer term.

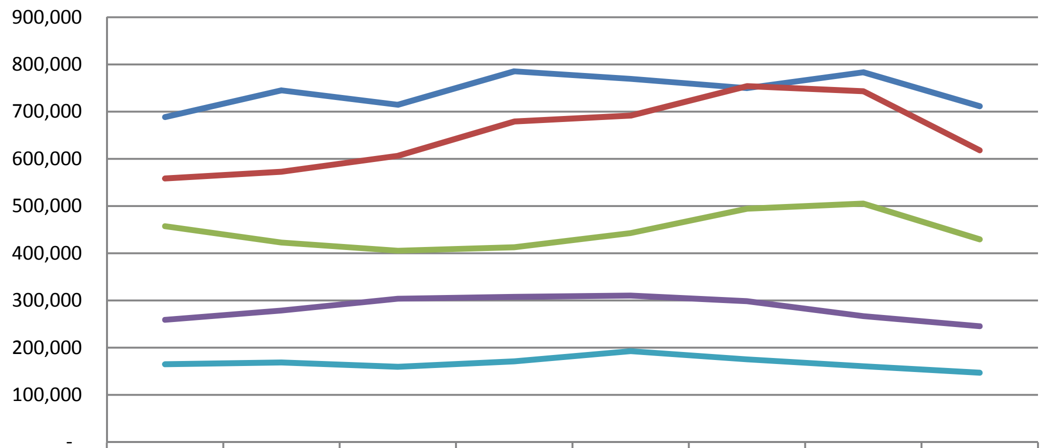
Number of trips by New Zealanders involving selected passive recreation activities (Source: Domestic Travel Survey)

Activity	YE Dec 2011	YE Dec 2012	% change
Sightseeing (land)	4,872,718	4,905,273	+1
Other scenic/natural attractions	4,511,105	4,732,748	+5
Volcanic/geothermal attractions	964,406	1,139,390	+18
Lookouts and viewing platforms	148,734	179,483	+21
Heritage attractions	146,384	244,801	+67
Nth Island National Parks	14,614	33,874	+32
Birdwatching	120,482	153,734	+28

3.1.3.2 TWT Conservancy Perspective[30]

The relatively stable domestic travel market is mirrored by visitation trends in the TWT regions, as seen in the following data drawn from the Domestic Travel Survey.

NZ Residents Travelling to the TWT RTO Regions to YE December 2012 (Source: Domestic Travel Survey)



	Year ended Mar 11	Year ended Jun 11	Year ended Sep 11	Year ended Dec 11	Year ended Mar 12	Year ended Jun 12	Year ended Sep 12	Year ended Dec 12
Lake Taupo RTO	688,481	744,987	714,682	785,322	769,321	749,899	783,211	711,509
Rotorua RTO	558,459	572,679	606,323	678,952	691,430	753,697	742,908	617,911
Taranaki RTO	457,376	422,855	405,554	412,500	442,775	494,295	504,947	429,676
Ruapehu RTO	259,092	278,655	303,754	307,423	310,410	298,352	266,824	245,656
Wanganui RTO	164,785	168,631	159,516	171,109	192,749	175,423	160,711	147,053

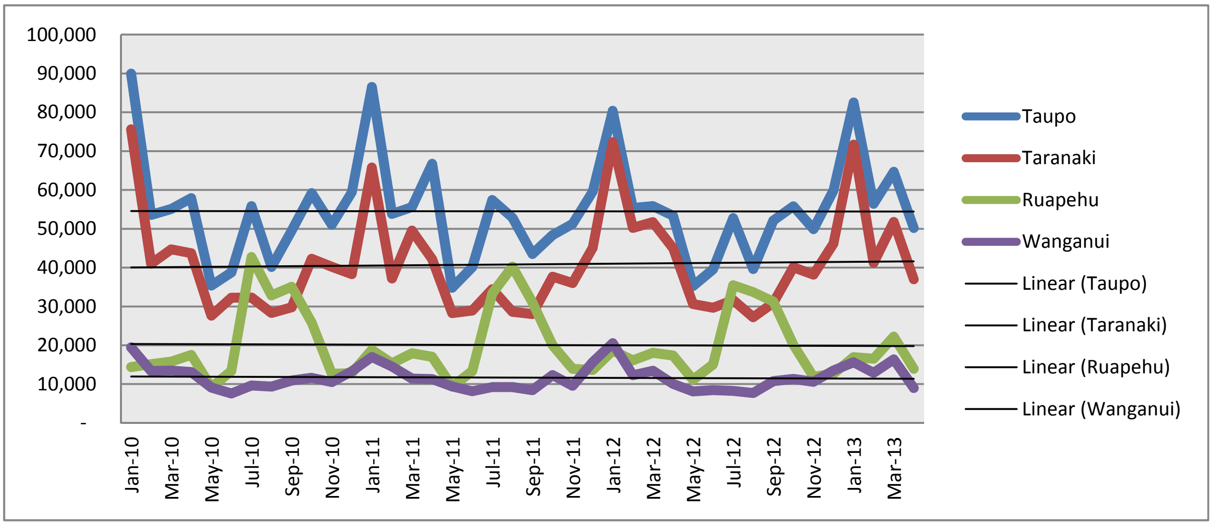
[30] Ministry of Business, Innovation and Employment. *Domestic Travel Survey Data*.

These trends were confirmed in the observations made by regional tourism experts interviewed for this report. Representatives of local RTOs, in particular, identified a stable trend in domestic visitation to their regions and expressed optimism about the outlook for the medium-term.

Visitor Nights[31]

An examination of the nights spent by domestic visitors in the TWT regions also shows stability over time, with only a slight increase apparent in the trend for Taupō. Varying seasonal patterns are also apparent in this data, with only Ruapehu experiencing its peak season during the winter months.

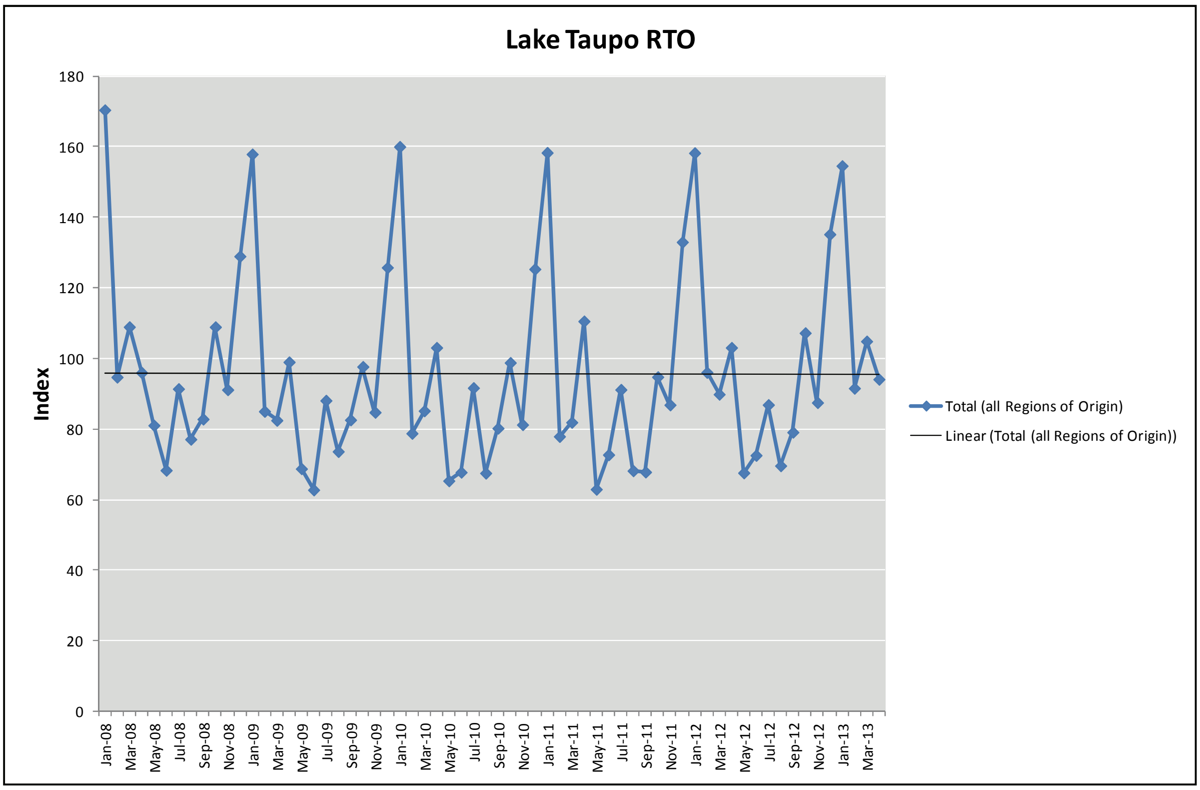
Commercial Guest Nights in the TWT RTO Regions to March 2013 (Source: Commercial Accommodation Monitor)



[31] Ministry of Business, Innovation and Employment. *Commercial Accommodation Monitor Data.*

Visitor Expenditure[32]

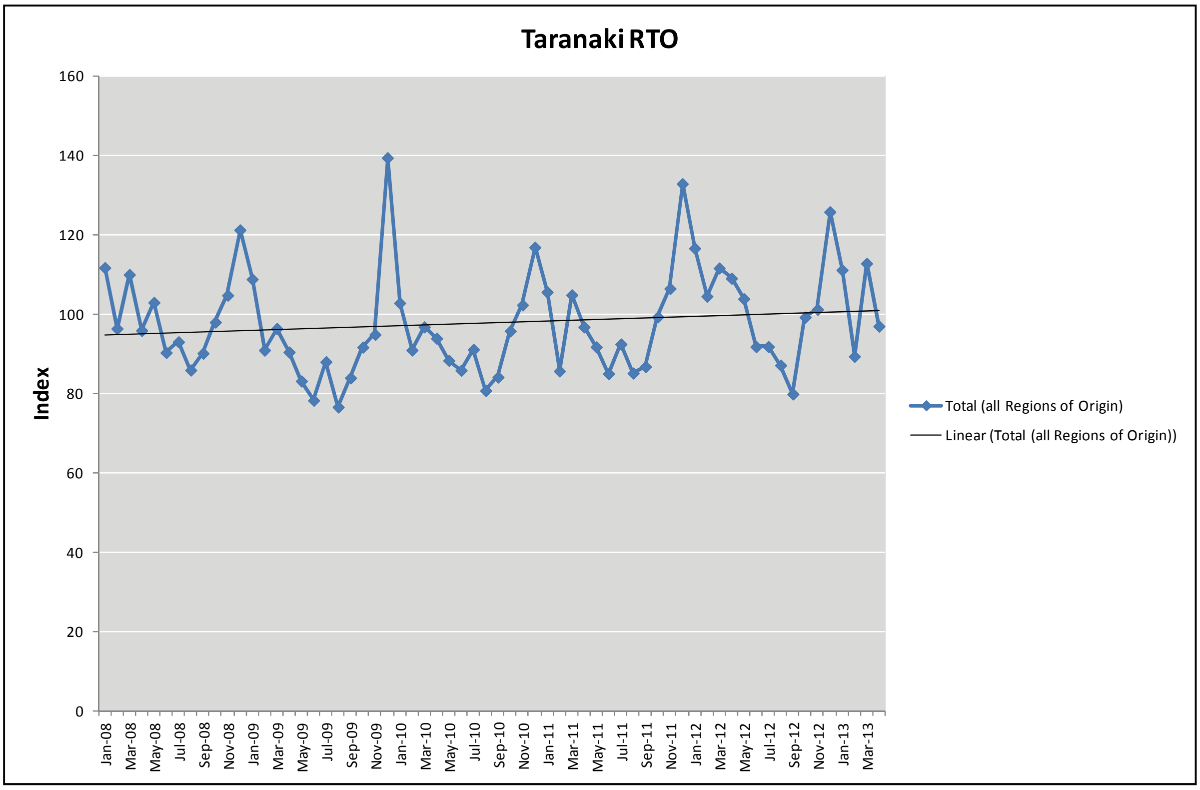
The Regional Tourism Indicators (RTIs) show a stable domestic expenditure trend for the Taupō area, with peak season expenditure in December/January.

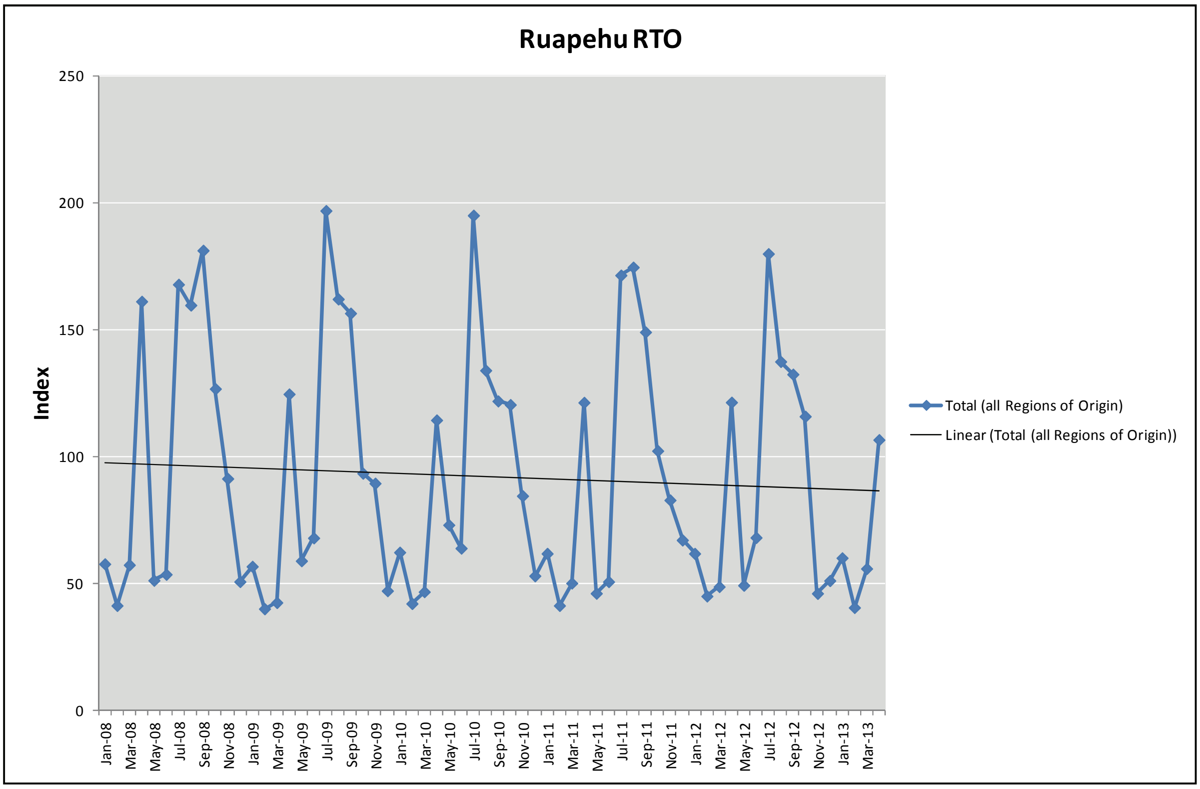


Domestic market expenditure in the Taranaki RTO region has increased gradually over time, while the reverse is apparent in Ruapehu. Patterns of expenditure in Ruapehu also confirm the area's status as a winter holiday destination for the domestic market (peak season during the winter months, preceded by an autumn peak probably around the Easter holiday period).

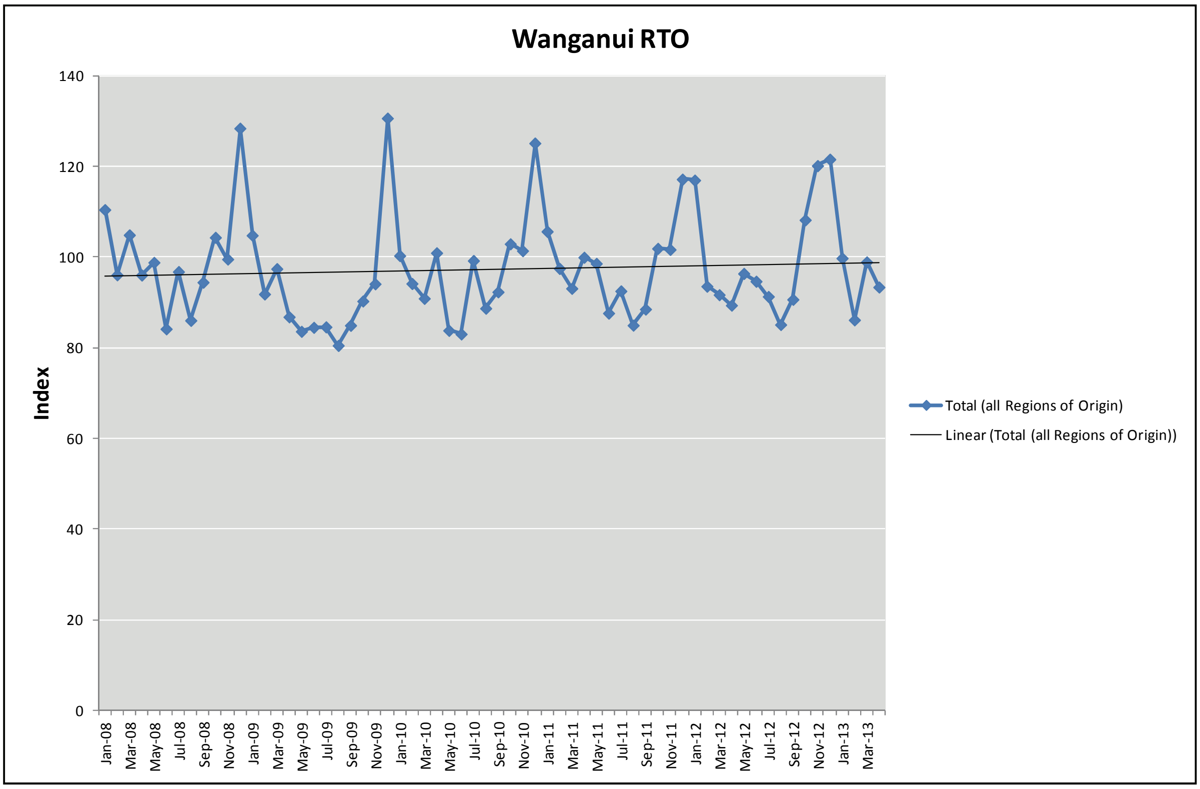
Refer to charts overleaf.

32 Ministry of Business, Innovation and Employment. *Regional Tourism Indicators.*


Taranaki RTO
Index
Total (all Regions of Origin)
Linear (Total (all Regions of Origin))


Ruapehu RTO
Index
Total (all Regions of Origin)
Linear (Total (all Regions of Origin))

Domestic visitor expenditure in the Wanganui area has increased very slightly over the last five years.



3.1.4 Relevant niche tourism trends [33,34,35,36]

Several emerging special interest markets are expected to continue growing on a global basis, with the highlighted set below being considered of most relevance to DOC in the context of the TWT Conservancy due to the regions' rural, natural and other geographic features and infrastructure.

Most relevant to DOC

- **Rural tourism**
- **Nature based tourism**
- **Cultural and heritage tourism**
- **Adventure tourism**
- **Health and wellness tourism**
- **Seniors tourism**
- **Local niche markets**

Less relevant to DOC

- Cruise tourism
- Space tourism
- Business events tourism
- Religious tourism
- Event tourism
- Urban tourism
- Gap travel

Rural tourism

Rural tourism involves tourism activities which take part in country areas. Rural tourism is closely related to the traditional and romantic idea of 'the good old days' (a pure and simple lifestyle), experiencing what is perceived as a 'healthy' lifestyle (with fresh air, wholesome food and exercise), getting away from a stressful and fast-paced city environment to the peace and tranquility of the bush; and enjoying the friendly warmth and hospitality of country people. Thus, nostalgia of the origins, the need for recuperation of the lost link with nature, and the 'basics' of life, in an increasingly complex, highly organised, anonymous, congested, stressful urban and 'inhuman' surrounding constitute the principal attraction of rural areas.

Nature based tourism

Nature-based tourism will continue to be one of the fastest growing areas of the tourism industry and a very important justification for conservation. The increasing dominance of technology in our daily lives also promotes this trend. Rainforests, wilderness areas, the ocean and other unpolluted regions provide a unique and necessary chance to escape from stressful work environments. As the world's supply of pristine natural environments dwindles, however, and the demand for them increases, their price will increase compared to mass tourism experiences. Many destinations are developing 'ecotourism' (responsible travel that conserves natural environments and sustains the well-being of local people) to satisfy a growing demand for nature-based tourism and also to help preserve the stock of 'natural capital' so important to a sustainable tourism industry. On a global scale, the demand for ecotourism and nature-based holidays is expected to double and even triple in the next 20 years. Ecotourism trips can cover a wide range of features with different levels of intensity of involvement, while the nature component provides the opportunity for it to be a tool for preservation, conservation, appreciation and learning.

Potential will only be realised if natural resources are managed appropriately. Destinations and enterprises will need to better manage their natural and cultural attractions in order to conserve these resources for environmentally conscious markets and as draw cards for all types of visitation.

---

[33] Dwyer L., *Megatrends underpinning tourism to 2020: Analysis of key drivers for change*. STCRC 2008

[34] Balmford A, Beresford J, Green J, Naidoo R, Walpole M, et al. (2009) *A Global Perspective on Trends in Nature-Based Tourism*. PLoS Biol 7(6): e1000144. doi:10.1371/journal.pbio.1000144

[35] Living Reviews. *Outdoor Recreation and Nature Tourism: A European Perspective.* Living Rev. Landscape Res., 1, (2007), 2 http://www.livingreviews.org/lrlr-2007-2

[36] Ministry for Culture and Heritage, *Demand for Cultural Tourism*. Angus & Associates 2008

To help meet the need for nature-based tourism, developers are using new technology to create artificial environments close to origin markets. An implication of climate change, however, is that destinations and products will seek to become both weather independent (through artificial environments) and attractive to markets that are less weather dependent (conventions; specialty markets—ecotourism, culture/heritage, education and training).

The paper 'A Global Perspective on Trends in Nature Based Tourism' investigates reports that state rapid growth in nature-based tourism and recreation add significant weight to the economic case for biodiversity conservation but seem to contradict widely voiced concerns that people are becoming increasingly isolated from nature. This apparent paradox has been highlighted by a recent study showing that on a per capita basis, visits to natural areas in the United States and Japan have declined over the last two decades.

There are growing concerns about an emerging disconnect between people and their natural environments. Increasing urbanisation and the rise of sedentary, indoor pastimes (such as television, the Internet, and video games) have been linked to a reduction in informal, outdoor recreation, with potentially serious consequences for childhood development, mental and physical wellbeing, and environmental knowledge and concern. Many see this as a major challenge for biodiversity conservation if people no longer experience and know their natural environments, how can they be expected to care about them?

However the paper finds that while visit rates to natural areas are indeed declining in some wealthy countries, in roughly three-quarters of the nations where data was available, visits to Protected Areas were increasing. Internationally, rates of growth in the number of visits to such areas show a clear negative association with per capita income, which interestingly is matched by trends in international arrivals as a whole. The results suggest that, despite worrying local downturns, nature-related tourism is far from declining everywhere, and may still have considerable potential to generate funds for conservation and engage people with the environment.

Another paper investigating outdoor recreation and nature tourism from a European perspective and compared to North America points to the same drivers and trends in nature based tourism as described in the sections above and resulted in a list of growing outdoor activities, some of which are also applicable to the TWT region (highlighted):

Fastest growing nature based activities in the future*	**Slowest growing nature based activities in the future***
Kayaking	Motor boating
Snowboarding	**Primitive camping**
Jet skiing	**Sailing**
View or photograph fish	**Visit historic sites**
Snow mobiling	Snorkeling/Scuba
Ice fishing	**Visit beach/waterside**
Sledding	**Downhill skiing**
Backpacking	**Other Fishing**
Day Hiking	Caving
Bicycling	**Small game hunting**
Horseback riding	**Picnicking**
Canoeing	**Swimming**

*Not ordered by importance

Cultural and heritage tourism

Cultural tourism has many forms and levels of intensity. Small volumes are motivated by an educational, academic perspective, while at the other end of the spectrum large volumes of resort or general interest tourists want a cultural component such as a day trip to a heritage site. Tourists seeking 'authenticity' in their experiences will provide additional pressure for the preservation of historic (heritage) monuments, ethnic culture and pristine nature.

With regard to demand for cultural tourism products, our analysis suggests that cultural experiences are a factor in the travel decision-making of at least one-third of international visitors, but fewer than 10% of domestic visitors. In the international market segment, demand for cultural experiences is generally strongest amongst women, older visitors (45 years or more) and those originating from North America and Germany. Tourism New Zealand's Visitor Satisfaction research suggests that, amongst international visitors, interest is highest overall in regard to Maori cultural experiences and major art/cultural events. International visitor participation in arts/cultural/heritage experiences has increased since the original Demand for Cultural Tourism research was completed in 2003. However, the same cannot be said of domestic visitors, amongst whom participation rates are unchanged.

Health and wellness tourism

Health and fitness is becoming an increasingly important aspect of people's lives and as such also an important aspect of travel. Increasing stress in people's lives will generate more demand for (comfortable) reclusive and escapist products in natural and peaceful environments. Health and wellness tourism is destined to become a huge niche market by 2020. People will combine treatments and travel. Holidays, once purely recreational, are moving into the realm of physical, mental and even spiritual rejuvenation. There is increased interest in alternative medicine and activities such as yoga and meditation, fitness and exercise programs, aromatherapy, weight loss and spa treatments, in the expectation of delivering better balance between humans and nature.

There are substantial opportunities for operators to develop health tourism products and services. These can include promoting core health themes for body, mind and soul programs for different niche markets; nature based, indigenous and environment-friendly products; low frill health tourism; and work with health care professionals.

Seniors tourism

Declining population growth rates in the industrialised countries have two important implications for tourism: first, the population of developing countries will comprise a growing proportion of the world total; and, second, the numbers of older persons in industrialised countries will constitute a higher percentage of the total population in such countries. The direct consequence of this ageing pattern will be that seniors will be responsible for a bigger share of all holiday spending. It will also have a notable impact on the type of holidays taken and destinations chosen.

Many older people want to enjoy the same activities and entertainment that they enjoyed in their youth, and they have more disposable income to spend on them. Coupled with better health they will demand products and services that cater to their ageing needs. Interest in sea cruising and nomad travel (car/campervan) will continue to attract this market. There are opportunities to develop product and services that support this type of travel. Mature travellers also may well be more interested in cultural and heritage tourism and self education. There will be a growing emergence of rich-packers (wealthy urban professionals that return to the countries they once visited as penniless backpackers).

Local niche markets

Individual countries and regions have particular assets that provide the basis for both established and emerging special 'niche' tourism markets. While the aforementioned markets apply 'globally' to tourism, this doesn't preclude specific destinations developing new products and services for special interest markets. In the context of the TWT region local niche markets can apply in regards to hunting, fishing, film tourism, kayaking, mountain biking and cycling in general.

3.1.5 Trends in New Zealanders' use of the outdoors [37,38,39,40]

The DOC Visitor Trends report also provided information on New Zealanders' participation in various outdoor recreation activities and a focused analysis of the most common activities undertaken. As outlined in the preceding sections, walking is the most popular and growing activity and, albeit still a niche, cycling shows signs of increasing popularity.

Walking and Tramping

The Active New Zealand Survey 2007/08 showed that 64% of New Zealanders had walked for recreation at least once over the year. As is the case with domestic tourists, walking remains the most popular activity and walking is the most significant recreational activity undertaken by New Zealanders on public conservation land. The DOC National Survey of New Zealanders shows that of the 57% of New Zealanders who had visited a DOC managed area in 2011/12, more than a third had undertaken a short walk of less than three hours and 10% had undertaken a day walk. Tramping/bush walking in comparison, which is usually considered to be an overnight or multiday activity, had a much lower participation rate of approximately 5.1% (306,000 New Zealanders). This also reconfirms the popularity of shorter walking activities. A similar finding emerged from the 2011/2012 National Survey of New Zealanders, with 3% of visitors to public conservation land indicating participation in an overnight or multi-tramp walk.

Age was found not to be an influencer on participation on tramping. It is generally other circumstances in terms of choice and time pressures that have people leaning more towards shorter day walks as described in the global trends.

Mountain Biking/Cycling

There is a general perception that cycling activities are increasing in popularity. The development of a variety of cycle trail in the TWT conservancy is a reflection of this trend. However, at present, there is no detailed trend data available to confirm this. The Active New Zealand survey estimated that 6.1% of New Zealanders (202,000 people) had participated in mountain biking over a 12 month period. Roy Morgan Research in 2011 found that 2.5% of New Zealanders (89,000 people) were regular mountain bikers and 2% of visitors to public conservation land indicated that mountain biking was the main activity on their most recent visit in 2012.

A special interest tourism profile of international tourists by Tourism New Zealand provides an overview of cyclist characteristics, which may broadly be similar for domestic/recreational cycle activity due to the fact that the vast majority of international cyclists come from similar western countries/cultures (e.g. Australia, UK, USA and Germany). On-road cycling slightly dominates international cycle tourism to NZ (54.2%) compared to off-road/mountain biking (45.8%). Important to note is that these two forms of cycling are very distinct and most cyclists favour one or the other and won't participate in both (4.2%). Assuming these useage patterns are similar to those of New Zealanders there are strong opportunities to foster on-road cycling and specific 'road cycle trails' or 'routes' in addition to the more mountain bike oriented New Zealand cycle trails, such as the Mountains to Sea Trail and Taupō's Great Lake Trail. The level of cycling participation by international visitors

[37] Harbrow M. *Visitor Trends Report.* Department of Conservation 2013

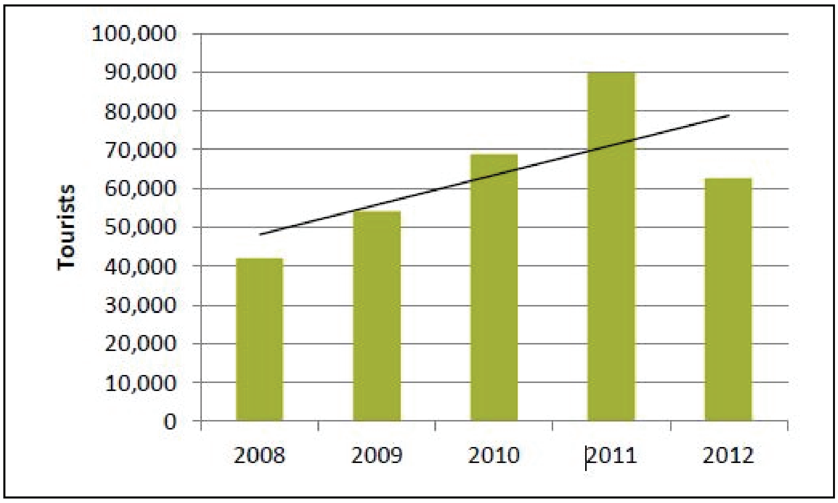
[38] SPARC, *Active NZ Survey*. 2007/8

[39] The Department of Conservation. *National Survey of New Zealanders 2012*.

[40] Tourism New Zealand. Tourist Special Interest Profile: Cycling. April 2013

has been increasing over time (despite a recent dip in numbers) and it is anticipated that numbers will continue to grow and cycling will be a significant attraction in New Zealand.

Cycling Sport Participation in NZ, 2008-2012:



TNZ's analysis also showed that cyclists generally spend a much larger amount – and stay longer - during their visit to New Zealand than the average visitor. Cyclists also tend to be more 'in the market' for other active outdoor-based experiences, such as kayaking and rafting, climbing, horse riding and a variety of other outdoor activities, when compared to the average visitor. This also shows the strong potential of this market for the TWT regions, which are able to offer such activities.

Camping

Slightly older survey data from 2006 (Mobius Research) found that 37% of New Zealanders were regular campers. A further 20% were described as latent campers, a group made up of people who were not regular campers but who had a continuing interest in camping, or people who have never camped but showed an interest in doing so in the future. The sizeable proportion of latent campers does indicate scope to grow the camping market.

The DOC National Survey of New Zealanders 2012 found that, of the people who have used a DOC facility in the past three years, 45% had used a DOC campsite (20% a basic campsite, 16% a standard campsite and 9% a serviced campsite).

Fishing

Results from several surveys show that participation in freshwater fishing is static or declining:

- The Fish & Game National Angler Survey (2009) estimated that New Zealand resident anglers had spent 1.156 million angler-days within Fish & Game managed fisheries in 1994/95. This declined to 1.111 million angler days in 2001/02 and increased to 1.202 million angler days in 2007/08. The total number of angler-days increased by only 4% over a period of 13 years.

- The Roy Morgan survey estimated that the number of New Zealanders who were regular freshwater fishers decreased 9% between 2002 and 2011 from 67,000 to 63,000 (Roy Morgan Research unpublished data). This was a decline in participation rate from 2.2% to 1.8% of New Zealanders (Roy Morgan Research 2012).

- The Active New Zealand Survey estimated that 5.7% of New Zealanders participated in freshwater fishing in 2007/08 (Sport and Recreation New Zealand 2009)

- In 2011/12 2.5% of visitors to DOC managed areas indicated that they had been fishing on their most recent visit (Colmar Brunton Research unpublished data).

Hunting

Hunting appears to be one of only two major outdoor activities that are growing strongly.

- According to the Roy Morgan Survey, the number of regular hunters increased 32.6% between 2002 and 2011 from 46,000 to 61,000 New Zealanders (Roy Morgan Research unpublished data). Participation was estimated to have increased from 1.5% to 1.7% of New Zealanders (Roy Morgan Research 2012).

- The Active New Zealand Survey estimated that 4.6% of New Zealanders were hunters in 2007/08 (Sport and Recreation New Zealand 2009).

- According to the Domestic Travel Survey, hunting and shooting was included in 470,000 domestic trips in 2011. This was a 34.1% increase from the previous year (Ministry of Business, Innovation & Employment 2013).

- However, DTS data to the year ending 2012 saw a drop in hunting activities by 12%.

3.1.6 Domestic Tourism Market Segmentation [41]

Tapping into the knowledge of the domestic tourism market segments will allow DOC to focus resources on the domestic 'customers' who are most likely to be persuaded to visit their destinations or purchase/use their products or services.

Destination planning should take a segmentation approach: targeting the segments to which existing products appeal and developing products for segments to whom the destination is lacking in appeal.

For DOC, this translates into priorities which:

- Better align delivery of recreational and historic facilities and services with visitor needs/visitor demand.
- Better target messages to build awareness of - and desire for - existing product.
- Provide more opportunities for more visitors: i.e. encourage greater experience of DOC-managed places for recreational and historic purposes and, in doing so, connect more people with conservation values.
- Better target other messages to build awareness and understanding of conservation values.

Due to the variety of DOC products and experiences available in the TWT regions, there is essentially something on offer for everyone. However a focus should be placed on segments most interested in the experiences already offered by DOC (e.g. nature based experiences, cultural and heritage attractions).

The 2009/10 Domestic Tourism Research project, undertaken for the Ministry of Tourism on behalf of New Zealand's wider tourism sector and key industry stakeholders, identified eight distinct domestic tourism

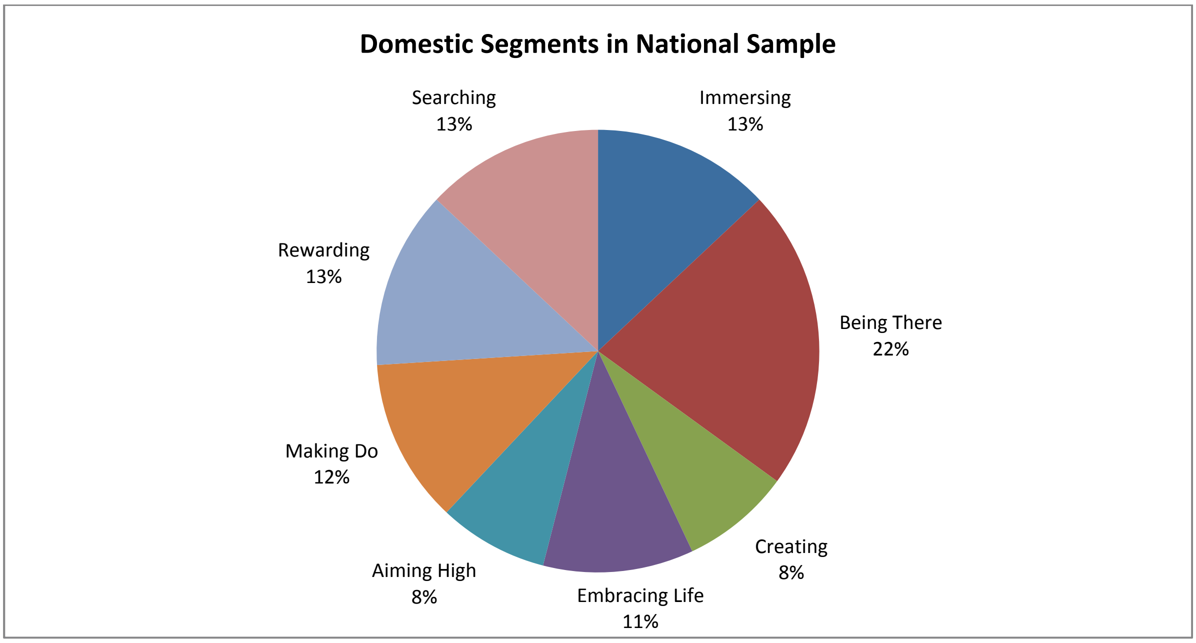
[41] Domestic Tourism Market Segmentation Study undertaken by Angus & Associates for the former Ministry of Tourism 2009/10

market segments. The research was completed by a consortium comprising Angus & Associates, The Knowledge Warehouse and Tourism Resource Consultants with a view to: -

1. Improving the sector's understanding of the domestic tourism market.
2. Segmenting the domestic market in a way that is practical and meaningful for tourism marketers.
3. Demonstrating the significance of the domestic tourism market and its key market segments.
4. Informing policy and other work undertaken by local and central Government stakeholders.

The Domestic Tourism Research project involved a series of stages: secondary research (analysing existing domestic tourism data), new qualitative research with domestic travel consumers, a major online survey involving a representative sample of n=2032 New Zealand residents aged 15 years or more, and market segmentation analysis using the resulting survey database. The final market segmentation solution identified eight groups of domestic travel consumers – each different in its demographic and psychographic profile, its travel behaviour and its travel needs, and each calling for a different marketing approach.

The proportions of the identified segments are provided in the following chart, with segment specific details included in the appendix to this report.



The domestic market segments with the strongest interest in more active nature-based activities are: Immersing, Embracing Life, Creating and Aiming High[42]. These segments show a stronger inclination for hiking, visiting national parks and reserves, fishing and boating, cycling or mountain biking than other market segments. The Immersing segment in particular is of significant interest to DOC due the variety of outdoor activities and attractions sought by this segment. The more niche outdoor/adventure activities, such as kayaking, wintersports, extreme sports etc., are sought by the Embracing Life and Aiming High segments.

An ideal holiday for the four segments highlighted above features nature based experiences and outdoor activities. Being There is attracted more to nature based experiences rather than activities, which includes

[42] An overview of the Domestic Tourism Segments is provided in the appendix. Please visit the MBIE website for further information: http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data/other-research-and-reports/domestic-tourism-market-segmentation-study

visiting parks, reserves and national parks. The Being There segment also shares a strong interest in history and heritage, as well as scenic experiences, with the Immersing and Creating segments.

There is some demand for DOC accommodation products in all domestic market segments but the Creating and Aiming High segments are by far the strongest users, followed by Embracing Life and Being There. DOC accommodation should target these segments specifically but in order to increase visitation by the other segments, especially Immersing, alternative accommodation options such as hotels, motels, backpackers, farm stays etc., need to be available in the vicinity of the attractions.

The domestic market segmentation also showed the perceived levels of 'knowledge' of New Zealand destinations, as well as 'desire' to visit. These are good indicators of the relative attraction of individual regions. Of the TWT regions, Lake Taupō commands the highest levels of knowledge, as well as desire, in all domestic markets segments. This is followed by Ruapehu, Taranaki and Wanganui with the lowest levels. Again these findings reinforce the stronger market position of the Taupō and Ruapehu regions.

Also of note is that levels of regional knowledge in relation to each TWT destination are mostly higher than the corresponding levels of desire, indicating a mature 'destination lifestage' with the need to 'rejuvenate' and rekindle market demand. In contrast, this knowledge/desire dynamic is often the opposite for competing destinations which feature nature-based attractions (such as Wanaka, Queenstown, Bay of Islands, Coromandel, Bay of Plenty, Nelson, Fiordland and others).

As each market segment has specific characteristics and 'needs' in terms of travel behaviour, a high level approach in developing strategies to attract the key domestic market segments as identified above is summarised below.

Being There:

1. Identify specific motivations, needs and characteristics:
   - Core marketing proposition for this segment – 'Being with family and friends'
   - This segment often travels to visit family and friends and tends to organise activities and experiences around this main travel purpose.
   - Most interested in sightseeing, shopping, natural attractions, walking/hiking and culture/heritage attractions.
   - More focused on nature-based 'experiences' than more active, challenging 'activities'.
   - Key destination characteristics are safe, familiar and affordable.
   - Barriers to travel can be health or disability as well as lack of travel companions.

2. Identify marketing opportunities:
   - Day trip, excursions, short immersion experiences.
   - VFR campaigns and packages.
   - Garden/nature products and events.
   - History/heritage products and events.
   - Small group (special interest) tours.
   - Assisted travel (transport, accommodation).

3. Identify existing DOC products and infrastructure that could cater to the needs of this segment, as well as other appropriate products and services available within the wider destination, to identify opportunities for collaboration/packaging with private sector partners.

4. Select appropriate marketing channels to 'reach' this audience with appropriate 'offers':
   - Major daily newspapers.
   - Special interest media (e.g. gardening channels/magazines/groups).
   - Affinity groups (churches, voluntary and social groups and clubs).
   - Targeted online channels (news sites, Skype, online auction sites).
   - Targeted email marketing.

Immersing:

1. Identify specific motivations, needs and characteristics:
   - Core marketing proposition for this segment – 'Expand your mind, add to your experience, enrich yourself'.
   - Key motivations to travel are to escape the stress and pressure or everyday life and to reconnect with friends and family (doing things together).
   - Most interested in destinations which are not familiar and which provide a wide variety of experiences such as scenery, different landscapes, cuisine, culture, nature, animals, as well as history and heritage.
   - Nature-based activity focused, especially in regards to hiking, cycling or mountain biking, kayaking, visiting national parks and reserves.
   - This segment travels frequently but barriers to travel are mostly time constraints such as limited annual leave and work commitments, as well as money.
   - This segment is prominent in the Wellington region, with relatively easy access to the TWT region.

2. Identify marketing opportunities:
   - Day and overnight trip, short immersion experiences offering variety and opportunities to learn and expand the mind and to share experiences with friends/family.
   - Products involving nature, health, wellness, culture, arts, heritage, wildlife, food and wine.
   - Quality accommodation important to this segment, such as hotels, motels, quality backpackers, huts and camping facilities. New niche trends such as 'glamping' (luxury camping), for example, are likely to appeal to this segment.

3. Identify existing DOC products and infrastructure that could cater to the needs of this segment, as well as other appropriate products and services available within the wider destination, to identify opportunities for collaboration/packaging with private sector partners.

4. Select appropriate marketing channels to 'reach' this audience with appropriate 'offers':
   - Special interest and lifestyle media.
   - Online lifestyle channels and social media.
   - Professional media/interest groups.
   - Tertiary education institutes.

Embracing Life:

1. Identify specific motivations, needs and characteristics:
   - Core marketing proposition for this segment – 'A full life for you and your family'.
   - Family holidays are important to this segment, where they take part in their favourite active home interests with their families, away from the pressures of everyday life.
   - Most interested in destinations which are family friendly, involve outdoor experiences and activities, scenery and food.

- Nature-based activity focused, especially in regards cycling and mountain biking, hiking, kayaking, boating and fishing.
- This segment travels frequently but barriers to travel are mostly time constraints such as limited annual leave, work and care commitments, as well as suitability for children.

2. Identify marketing opportunities:
   - Outdoor and adventure experiences for the whole family, cultural and heritage attractions.
   - Winter sport product.
   - Cycling product.

3. Identify existing DOC products and infrastructure that could cater to the needs of this segment, as well as other appropriate products and services available within the wider destination, to identify opportunities for collaboration/packaging with private sector partners.

4. Select appropriate marketing channels to 'reach' this audience with targeted 'offers':
   - Business media
   - Special interest media on-and off- line (e.g. golf, outdoor, boating, fishing)
   - Newspapers
   - Boating/fishing, outdoor events.

Creating:

1. Identify specific motivations, needs and characteristics:
   - Core marketing proposition for this segment – 'Good times to share with your family'.
   - Travel is mostly prompted by visits to family and friends and is about keeping in touch with people rather than seeing places.
   - Peaceful destinations facilitating quality time with family and friends are preferred.
   - The enjoyment of activities and experiences comes from the sharing with family and friends.
   - Enjoy walking and water activities and are interested in culture and heritage.

2. Identify marketing opportunities:
   - Social experiences and group activities.
   - Nature product (especially surrounding water activities).
   - Camping and group accommodation.
   - Picnics and outdoor cooking.
   - Heritage and cultural product.

3. Identify existing DOC products and infrastructure that could cater to the needs of this segment, as well as other appropriate products and services available within the wider destination, to identify opportunities for collaboration/packaging with private sector partners.

4. Select appropriate marketing channels to 'reach' this audience with targeted 'offers':
   - Special interest groups/media (e.g. cultural focus).
   - Online channels and social media.
   - Targeted lifestyle media.
   - Cultural and community events and groups.

Aiming High:

1. Identify specific motivations, needs and characteristics:
    - Core marketing proposition for this segment – 'More, bigger, best'.
    - Travel is very important to this segment, where they thrive on challenges and excitement.
    - They seek ever new destinations offering a wide range of bigger and better activities.
    - Ideal destination is exciting, different, entertaining and challenging.
    - Interested in all kinds of active water activities such as surfing, waterskiing, diving kayaking and rafting, as well as other adventure activities on land and in the air such as mountain biking, snowboarding, sky diving and similar.
    - This segment also enjoys the destination's entertainment and nightlife.
2. Identify marketing opportunities:
    - Adventure and outdoor sports products.
    - Youth-, sports-, adventure events and packages.
    - Mountain Bike and winter sport product.
    - Niche extreme sport product.

3. Identify existing DOC products and infrastructure that could cater to the needs of this segment, as well as other appropriate products and services available within the wider destination, to identify opportunities for collaboration/packaging with private sector partners.

4. Select appropriate marketing channels to 'reach' this audience in promoting targeted experiences:
    - Youth media.
    - Special interest media (e.g. snowboarding/skiing, mountain biking, adventure magazines).
    - Online channels and social media.
    - Special interest groups and clubs.
    - Cinema.

3.2 Supply-side Situation and Trends [43, 44, 45,46]

Having examined public demand for recreational facilities, the next section of this report reviews the supply of DOC destinations at a national level as well as specifically in the TWT Conservancy. The Department's past and present role in protecting and developing New Zealand's natural resources is discussed and DOC-related TWT infrastructure/destinations is outlined.

Past

Tasked with managing a great number of assets across the country, DOC has traditionally been facility-focused compared to its current destination management approach. This includes maintaining facilities located within New Zealand's natural environment such as tracks, huts and bridges – many of which were inherited from its predecessors and the sum of which has sometimes been unknown. Over the years DOC has become more aware of its assets and a decade ago its brief was to restore the country's indigenous biodiversity, protect public conservation areas and supply access to these places for all New Zealanders. Today DOC's vision is that New Zealand is the greatest living space on Earth and the Department is increasingly interested in how all people choose to use our natural spaces. Its destination management approach sees DOC working collaboratively with others towards common goals and there is a commercial objective to seek business opportunities that deliver increased economic prosperity and conservation gain.

Present

DOC has become more customer-centric in its provision of experiences, aiming to meet the needs of New Zealand's residents and visitors. While the Department still manages around 4,500 destinations, including 14 National Parks, it is now focused on understanding demand to provide the best mix of facilities and services to ensure quality, enjoyable experiences suitable for a range of visitors. Its Destination Management Framework (DMF) approach looks to increase the participation of people in recreation and protect New Zealand's historic heritage.[47] To achieve this destinations are managed as Icons, Gateways, Local Treasures and Backcountry Networks.

Icons are key destinations intended to underpin national and international tourism in New Zealand, Gateways encourage people to start recreating in the outdoors and to learn about conservation, Local Treasures provide local places for local people and support regional outdoor recreation needs and Backcountry Networks are intended to provide challenging adventures in protected natural areas. In general Tongariro Icons and Gateways are primarily alpine-based (i.e. Tongariro Alpine Crossing, Whakapapa Village walks), whereas Wanganui destinations are river-based (i.e. Wanganui Journey) and Taranaki destinations alpine/coastal-based (i.e. Mount Taranaki, Tapuae Marine Reserve).

Destination management considers people's desired experience when they visit DOC-managed destinations rather than the maintenance of assets. It also aligns with the shared goals of other organisations such as Sport New Zealand and Tourism New Zealand who similarly seek to optimise user experiences. It is essential that DOC continues to work with others to deliver the best possible outdoor experiences to visitors. This includes national organisations (i.e. Tourism New Zealand and Sport New Zealand) as well as Regional Tourism Organisations, iwi and individual operators. Not only do these organisations have common objectives but DOC has a core role of facilitating the enjoyment and protection of New Zealand's natural environment – which suggests enabling others to implement the experiences that visitors desire.

---

[43] Department of Conservation, *A short history of the Department of Conservation: 1987-2007*, www.doc.govt.nz/publications/about-doc/a-short-history-of-doc/
[44] Department of Conservation, *Statement of Intent 2003–2006*, 2003
[45] Department of Conservation, *Statement of Intent 2012-2017*, 2012
[46] Department of Conservation, *DOC's 25th Anniversary Exhibition*, 2012
[47] Department of Conservation, *Destination management framework: A new approach to managing destinations*, 2011

DOC has acknowledged tourism as one of New Zealand's biggest export earners and a sector closely aligned with its own goals of helping to build economic prosperity, having more people participate in outdoor recreation and spending their leisure time and money in the places they recreate.[48] The DMF discusses people engaging with the natural environment as visitors and considers their overall experience when visiting a destination. The objectives of DOC also align closely with Sport New Zealand who highlight the importance of organisations and groups that provide opportunities for people to participate in outdoor recreation to be firstly aware of any changes in participant needs and then to be able to manage their resources to respond effectively.[49]

At a regional level Tongariro is described by international travel guides as New Zealand's volcanic plateau – it is an active volcanic region providing a playground for snow sports enthusiasts in the winter and a summer destination for trampers.[50] The region's towns are recommended as offering a range of outdoor experiences across the seasons from extreme activities to more sedate engagement with nature. For example Taupō offers both adrenaline-pumping activities[51] as well as scenic experiences, while Ohakune[52] and Turangi[53] provide access to many outdoor summer activities but come to life in winter. Wanganui's river and National Park are described as its central attractions. The overall area is said to offer many opportunities to experience the outdoors[54] and the city itself is described as pleasant with a thriving arts community.[55] Taranaki is described as being dominated by Mount Taranaki and the Egmont National Park.[56] It is surrounded by coastline offering good surf beaches and, although slightly isolated from other New Zealand cities,[57] its main centre (New Plymouth) is the commercial heart of Taranaki with an international port alongside arts and garden attractions.[58]

A map of current DOC destinations in the TWT Conservancy is shown overleaf. This map has been sourced from the DOC website and highlights what are promoted as the Conservancy's key places; categorised as "Great Walks", "Must See Places", "Easier Experiences" and "Historic Places".[59] It is acknowledged that Mt Taranaki, Wanganui River, Mt Ruapehu and Lake Taupō are also significant facilitators of recreational activity across the TWT region, although not necessarily identified as individual destinations on the DOC website. As shown in the map the TWT Conservancy currently contains groupings of destinations based around the Tongariro alpine region and Mount Taranaki/New Plymouth, with noticeably fewer destinations in Wanganui particularly towards its city centre. While the majority of TWT destinations are considered Easier Experiences or Must See Places, indicating that they are likely to appeal to visitor desires for outdoor experiences that are easy to engage in and are an escape from people's everyday lives, groupings of destinations are somewhat isolated from each other and there is no clear linkage for visitors to transition across the Conservancy.

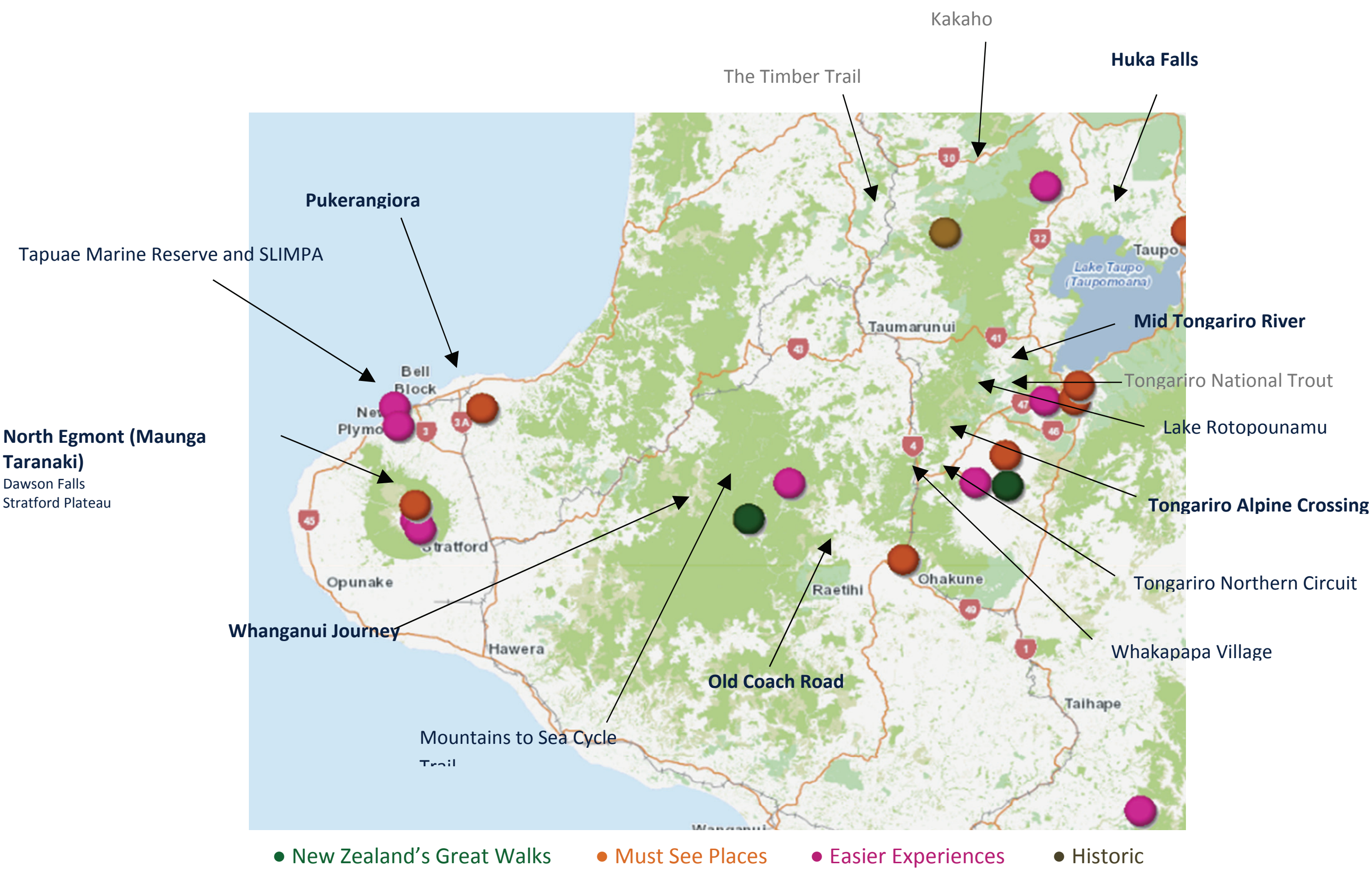
Current priorities for the DOC regions of Tongariro, Wanganui and Taranaki are to develop infrastructure around Icon and Gateway destinations, including alternative transportation modes to access destinations and

---

48 Department of Conservation, *Destination management framework: A new approach to managing destinations*, 2011
49 Sport New Zealand, *Outdoor Recreation Strategy 2009–2015*, 2009
50 Rough Guides, *Central North Island*, roughguides.com/destinations/australasia/new-zealand/central-north-island/
51 Trip Advisor, *Taupō*, tripadvisor.com/Tourism-g255113-Taupō_North_Island-Vacations.html
52 Lonely Planet, *Ohakune*, lonelyplanet.com/new-zealand/Taupō-and-the-central-plateau/ohakune
53 Lonely Planet, *Turangi*, lonelyplanet.com/new-zealand/Taupō-and-the-central-plateau/turangi
54 Lonely Planet, *Wanganui Region*, lonelyplanet.com/new-zealand/wanganui-and-palmerston-north/wanganui-region
55 Rough Guides, *Wanganui*, roughguides.com/destinations/australasia/new-zealand/western-north-island/wanganui/
56 Lonely Planet, *New Plymouth*, lonelyplanet.com/new-zealand/taranaki/new-plymouth
57 Lonely Planet, *Taranaki*, lonelyplanet.com/new-zealand/taranaki
58 Rough Guides, *New Plymouth*, roughguides.com/destinations/australasia/new-zealand/western-north-island/taranaki-peninsula/new-plymouth/
59 Department of Conservation, DOC Maps: Discover the Outdoors, maps.doc.govt.nz/Viewer/Index.html?viewer=rwa

the creation of commercial tourism opportunities. For Tongariro and Taupō this includes further progressing cycleways and providing access to outdoor experiences, such as a water taxi to support the Great Lake Trail and alternative experiences to the Tongariro Alpine Crossing for when weather conditions are unfavorable. Wanganui priorities are to support infrastructure and tourism business based around the Wanganui Journey and Mountain to the Sea Cycle Trail and attract sports people to the region. Taranaki is focused on increasing accommodation capacity and improving access to destinations through various transport alternatives.

Map of Present TWT DOC Destinations
(as identified on the DOC website)



3.2.1 Existing DOC infrastructure and usage

This section lists the relevant high level DOC infrastructure for each of the TWT Conservancy areas including visitation numbers where available (as provided by DOC). Trend data was unavailable for analysis in this report.

Taupō

The dominant Icon destination in the Taupō area is Huka Falls, followed by the major Tongariro based attractions. These Icon destinations are very accessible, located near major tourism routes and have gained widespread exposure and popularity.

Destination Name	Destination type	Estimated Visitor numbers per annum
Huka Falls	Icon	605,000
Tongariro Alpine Crossing	Icon	82,500
Tongariro National Trout Centre	Icon	58,000
Mid Tongariro River Walks	Icon	45,000

Of the designated Gateway destinations, the Upper Waikato River Tracks attract the largest number of visitors.

Destination Name	Destination type	Estimated Visitor numbers per annum
Upper Waikato River Tracks	Gateway	70,000
Lake Rotopounamu	Gateway	30000
Tongariro Northern Circuit	Gateway	6500

The TWT Conservancy encompasses a larger number of Backcountry and Local Treasure destinations. The most popular are listed here with the remainder outlined in the appendix to this report.

Destination Name	Destination type	Estimated Visitor numbers per annum
Tongariro River TR access track	Backcountry	12,000
Clements Mill Road	Backcountry	10,300
Tongariro River TL rds/tks	Backcountry	8,000
RTM-Ohinepango Spg 2 Waihohonu	Backcountry	5,500
Waiotaka River access track	Backcountry	5,000
Tauranga Taupō River access track	Backcountry	5,000

Destination Name	Destination type	Estimated Visitor numbers per annum
Tokaanu Hot Pools and Car Park	Local Treasure	135,000
Tokaanu Thermal Walk	Local Treasure	65,000
Aratiatia Rapids Viewpoints Walk	Local Treasure	40,000
Aratiatia Road	Local Treasure	35,000
Blue Pool Toilet	Local Treasure	30,000
Whakaipo Bay Amenity Area	Local Treasure	22,000

Interviews with Great Lake Taupō RTO confirmed that, from a tourist destination perspective, the area has 'sufficient' supply of experiences and activities in relation to the preferences of the traditional markets, i.e. the variety of outdoor experiences and activities on offer in the area from water to alpine, sedate to extreme, iconic to niche experiences. The area is regarded as the nature playground of the North Island, with a stable or growing demand. It was acknowledged that the supply of nature-related experiences will have to be sustainably managed in the future in order to preserve this demand.

New planned or possible 'pipeline' developments in the area with a possible impact on recreation and tourism include the development of more cycle trails into wilderness areas such as the Kaimanawa's. There is also a potential to link those new trails with existing cycle trails such as the Tongariro River Trail. The extension of existing cycle trails to other destinations such as Taupō Town, Tongariro National Park and other existing cycle trails (Timber Trail to Great Lakes Trail) and building transportation infrastructure around them (water taxi in Lake Taupō for instance) have also been raised as possibilities. In addition there are new walking opportunities identified at the southern end of the lake including a wetland walk and Mt Kakaramea.

Other social and political issues have also been identified as potentially playing a role in future developments in the Taupō area. These include the perceptions around the access to the lake and the impact that future treaty claims may have on access to other areas. Changes to the local government act and also a potential amalgamation of RTO's could have a negative and positive effect on destination marketing respectively.

Tongariro

The Tongariro experiences on offer are also classified as Taupō-related destinations. However, the Tongariro/Ruapehu area benefits and services the Tongariro drawcards to a large degree as well and are relisted here.

Destination Name	Destination type	Estimated Visitor numbers per annum
Tongariro Alpine Crossing	Icon	82,500
Old Coach Road	Icon	10,500

Destination Name	Destination type	Estimated Visitor numbers per annum
Whakapapa Village walks	Gateway	40,000
Tongariro Northern Circuit	Gateway	2,500

Destination Name	Destination type	Estimated Visitor numbers per annum
Dome volcanic eruptn/Lahar warning shltr	Backcountry	14,000
RTM tk-Ohakune Mtn Rd -Lake Surprise	Backcountry	6,000
Dominion Road- (Tongariro Forest Access)	Backcountry	6,000
Kapoors Rd -Tongariro Forest/42 Traverse	Backcountry	5,000
42 Traverse-Slab Rd crpk-Dominion Rd cpk	Backcountry	5,000

Destination Name	Destination type	Estimated Visitor numbers
Bruce Road (CS)	Local Treasure	454,000
Whakapapa Visitor Centre carpark/toilets	Local Treasure	244,441
Whakapapa Village Bus Park	Local Treasure	100,000
Ngauruhoe Place, Whakapapa Village (CS)	Local Treasure	35,000
Mangawhero Falls Walk	Local Treasure	25,000
Waitonga Falls Walk (RTM Track link)	Local Treasure	20,000
Rimu Walk	Local Treasure	16,000

Ruapehu District Council has a similar view on the demand trends for the area, i.e. it is stable or growing from the traditional markets. Supply is also seen as sufficient and sustainable management of experiences should be taken into account. Similarly to Taupō, the amount and variety of the local 'supply' of activities and experiences is seen as catering well to the demand of the traditional markets, including the expected growth in demand from these markets. The area is relatively more 'niche' oriented towards the scenic or active outdoor experiences and has less variety in unrelated experiences such as shopping or lake use, as has Taupō. Possible options of spreading demand over the existing infrastructure would alleviate pressures on iconic destinations such as the Tongariro Alpine Crossing. Furthermore, the increasing popularity of cycling/mountain biking and new cycle way developments are seen as a good way to even out seasonality and to provide alternative activities for when Mt Ruapehu (or Tongariro) is inaccessible due to weather or other factors.

New planned or possible 'pipeline' developments in the area with a possible impact on recreation and tourism include the upgrading and development of new lift facilities on the Ruapehu skifields and the upgrading of some tracks (Taranaki Falls, Silica Rapids, Waitonga etc) and huts (Oturere). There has also been identified that there is significant potential for further mountain biking opportunities within Tongariro National Park.

Taranaki

Mt Taranaki is the dominant attraction in the Taranaki area, with high visitor numbers to surrounding/relating attractions such as Stratford Plateau and Dawson Falls.

Destination Name	Destination type	Estimated Visitor numbers
North Egmont (Maunga Taranaki)	Icon	101,427
Pukerangiora Pa - Potential Icon	Icon	2,500

Destination Name	Destination type	Estimated Visitor numbers
Stratford Plateau	Gateway	149,674
Dawson Falls (Maunga Taranaki)	Gateway	73529
Ratapihipihi	Gateway	7616
Tapuae Marine Reserve and SLIMPA	Gateway	3,087

Destination Name	Destination type	Estimated Visitor numbers
Northern Summit Route	Backcountry	7,520
Waimoku Track	Backcountry	5,848
Ridge Track	Backcountry	5,000
Ram Track	Backcountry	5,000
North Egmont Summit Tk (Translator Rd)	Backcountry	5,000
AMC Tahurangi - Manganui Skifield Track	Backcountry	4,296
Fanthams Peak Track	Backcountry	4,000
Mangorei Track	Backcountry	3,627

Projected growth in the oil and gas industry in Taranaki will stimulate the local economy, creating jobs, migration and an increase in the demand for recreational options, as well as a resulting increase in VFR tourism to the area. This increase in demand is likely to attract new recreation and tourism developments in the future.

There is potential to grow mountain biking opportunities, including Pukeiti and into the National park itself. There is currently lobbying for more heli-tours on Mt Taranaki and also a potential expansion of air linkages to New Plymouth generally, making Taranaki more accessible. In addition, there are intentions to develop a historic heritage trail and to expand the successful coastal walkway. There is potential to explore how people can be connected to the marine environment via a marine reserve.

Wanganui

Wanganui area has considerably fewer designated DOC attractions and comparatively low numbers of visitors to the well known places in contrast to the other TWT areas. The prime destinations are the Wanganui River Journey and the Mountain to Sea Cycle Trail.

Destination Name	Destination type	Estimated Visitor numbers
Wanganui Journey	Icon	10,000

Destination Name	Destination type	Estimated Visitor numbers
"Mountain to the Sea" Cycle Trail	Gateway	2800

Destination Name	Destination type	Estimated Visitor numbers
Matemateaonga Track - Kohi to Omaru	Backcountry	1,200
Matemateaonga tk - Omaru to Wanganui R	Backcountry	880
Maraekowhai Tk to Ohura River waterfalls	Backcountry	730
Trains tk	Backcountry	522
Maraekowhai Historic Reserve (Nui Poles)	Backcountry	500

Destination Name	Destination type	Estimated Visitor numbers
Raukawa Falls Viewing Platform	Local Treasure	20,000
Gordon Park Scenic Reserve	Local Treasure	5,994
Pipiriki Toilet/Shelter (RDC building)	Local Treasure	4,000
Wanganui River Road Information Kiosk	Local Treasure	3,000

There is a possibility of a new hut being built in the Mangapurua as part of the Mountains to Sea cycle trail, and managed as higher level (serviced) accommodation, available in conjunction with other mountain biking opportunities (e.g. night rides, serviced camping and guided). A new multisport event across the Mountains to Sea cycle trail (including a mountain run and mountain bike day, kayak day, roadbike/run day) is also planned. A Wanganui Journey review and upgrade of the Wanganui Journey is scheduled to take place next summer (2014), taking into consideration partnerships and opportunities for growth in tourism for surrounding communities. A relating business case and marketing plan is currently being completed, including consultations with iwi around what the upgrade means for the future, how this compliments river road opportunities and other aspects.

4.0 Opportunities, issues and challenges

The preceding sections have outlined relevant trends drawn from available data and information sources relating to the TWT areas. These macro and micro level trends combine to present specific opportunities and pose challenges applicable to the whole TWT Conservancy, and to individual areas.

The following discussion identifies global level trends relating to changes in travelers' social and demographic characteristics. These include economic and political developments, environmental trends impacting on tourist source markets and New Zealand, as well as technological advancement that will have an effect on tourism in general. This is intended to provide context for subsequent sections identifying opportunities for the individual TWT areas.

4.1 Effect of global visitor trends on TWT Conservancy:

Economic

Increasing globalization results in easier access across borders and increased tourism flows to New Zealand, a proportion of which will be visiting the TWT areas. This will be most prevalent in the Chinese market with its restrictive travel policies. This barrier is predicted to become further relaxed and will contribute in growing visitors from China substantially. Large economies such as China and other emerging markets such as India, South America and South East Asia show strong economic growth. This, combined with the economic recovery in traditional main markets will potentially increase visitation to TWT areas (although global competition from international tourist destinations, as well as from domestic destinations perceived to be similar to the TWT regions will also increase as a consequence).

A new trend towards an 'experience economy' presents unique opportunities for the TWT destinations in providing memorable experiences with entertaining as well as educational (i.e. cultural) aspects.

Political

Political developments could potentially counteract or stimulate these economic advances and influence tourist flows to New Zealand and the TWT destinations. While the impact of political uncertainty is difficult to predict, destinations such as New Zealand and the TWT areas are more likely to benefit due to having a relatively 'safe' destination image.

Social

The predicted increase in potential travelers due to economic factors will also be influenced by ageing populations in developed countries and traditional main markets for New Zealand tourism. The age demographic of international visitors is predicted to rise. These new travelers have an increasing desire to maintain their health and will be more activity focused.

Travelers also increasingly seek 'authentic' tourism experiences, wishing to be more involved and engaged but at the same time seeking a variety of experiences. The opportunities for the TWT destinations are to offer a range of add-on experiences in addition to the major 'drawcards' to the regions. This is already developing to some degree, with the cycle trail developments providing an alternative or additional activity in regions traditionally linked with skiing for example, or the variety of experiences on offer in Taupō's 'nature playground'. There is an opportunity to provide additional cultural and heritage attractions to meet the preference in the market for authentic experiences.

Environmental

For winter sport-oriented TWT regions (i.e. Ruapehu) one particular effect of importance resulting from global climate change is that on snow cover. A lack of snow cover threatens the viability of the winter sport industry and has the ability to impact negatively on the area's peak season. Alternatives need to be developed, such as the cycle trails and other forms of activity to counteract this effect and ensure a sustainable tourism industry.

Technological

The increasing use of information and communication technology will change the way visitors to the TWT region gather information about the area, individual destinations and operators as well as how they subsequently book or purchase their experiences (including accommodation and activities). Knowledge and targeted use of these technologies will be essential for TWT areas to establish a competitive advantage over other regions, within New Zealand and internationally.

4.2 International and Domestic visitation trends and impact on TWT Conservancy:

The TWT Conservancy as a whole will experience the changes in the visitor trip characteristics and demographic make-up. The number of international visitors to New Zealand is growing, which will lead to an increase in visitation to the TWT regions as well.

However, overall, visitors are taking shorter trips and as a result spending less on their visit. International visitors have less time to visit a larger variety of destinations in New Zealand and within the TWT region. The TWT conservancy, from a destination point of view, will need to compete for a share of this reduced time budget with 'must see' icon and gateway attractions and a variety of 'add-on' experiences as alternatives if the main activities are 'not available' (due to weather, for example). A variety of experiences can also assist in increasing the time spent in the area.

Despite the overall outlook for New Zealand, the TWT regions (especially Taupō and Ruapehu/Tongariro) are still strong in the traditional markets. This is due to the regions offering these markets a good mix of 'famous' or 'must do' attractions, as well as iconic nature experiences in keeping with the experiences sought on a visit to New Zealand. Furthermore Taupō and Ruapehu/Tongariro are ideally placed along the main tourist routes through the North Island.

The national participation trends as well as global demand trends show that there is by no means a negative outlook for the TWT Conservancy. Interest and participation in nature-based activities is present in the new market and stable in the traditional markets. What is changing is demand for more front country-based activities which are easier to access and of shorter duration. Improving access and developing products and marketing activities will not only retain the traditional markets (which are still strong in the TWT regions) but over time capture the growing proportions of the Australian and Chinese visitors who are 'in the market'. Indeed, a short to medium term focus on getting the product and marketing mix right for the changing preferences of traditional markets, will pave the way to attract the growing target segments of the FIT Chinese and other Asian travelers. Current barriers exist in relation to access and the existence of a variety of 'must do' attractions, especially in the less popular Taranaki and Wanganui areas.

Investment in opportunities that are easily accessible from Auckland and that offer short, instant immersion experiences in the natural environment, are likely to be more important than some traditional opportunities that DOC provide in view of the main stream visitor markets (such as multiday tramping or other multiday activities). There will always be specific niches who want the more traditional DOC offers. But they also need to be packaged or targeted specifically, easy to find choose and purchase.

The changing patterns of demand, driven by changing demographics and travel characteristics, open up strong partnership opportunities for DOC with private businesses and tourism marketing organisations such as the RTOs and economic development agencies. This is of special importance in less popular or iconic areas such as Taranaki and Wanganui, where a focus may be required on the development of nature-based product to stimulate demand. However, in the more iconic Ruapehu and Taupō areas, partnerships will be important in managing demand and available natural resources, including conservation activities.

It has been said by the tourism experts that DOC should review the concession processes, making it easier to provide services on DOC land. For Taranaki it was said, for example, that there are multiple untapped opportunities on Mt Taranaki for businesses to increase their offerings for the market should access be made possible. The goal should be to increase attractive must-do icon attractions in these areas from where increased and sustained demand can spread to the surrounding region with add on experiences and activities.

There may be benefit in DOC working with the weaker regions to build on their respective competitive advantages and unique features to create regional drawcards. This would in turn open up other opportunities to spread demand, as is the case with Ruapehu, Tongariro and Taupō for example. People are drawn to these iconic destinations and demand for additional activities flow from it, as is the case with the cycle trails.

Hence the following are recommended as high level priorities for DOC:

- <u>Increase demand</u> for experiences in Taranaki/Wanganui through development of 'must do' icons, partnerships, marketing and accessibility.
- <u>Manage demand</u> for Ruapehu/Taupō through development of ancillary attractions, partnerships and appropriate marketing support.

Future engagement with the natural environment is expected to be impacted greatly by population changes and recreation preferences. New Zealand's population is increasingly urban, older, ethnically diverse and living in the north. It is believed that residents generally have less time and interest in the outdoors due to commitments such as work, competing urban events, a rising interest in technology, unfavourable weather conditions, traffic congestion and living costs.[60] Simultaneously, international visitors' average length of stay is also decreasing, meaning that many people from overseas do not have the time to travel beyond the main gateways (i.e. Auckland, Christchurch, Wellington) or to destinations away from iconic attractions and transport routes.

DOC's destination management needs to consider these changing customer preferences. With increasing competition for leisure time and travel costs it is foreseen that demand for traditional outdoor recreation will decline along with recruitment of new people into nature-based activities.[61] Sport New Zealand reports that many people want to participate in activities where and when it suits them, without high levels of commitment. At the same time they seek high-quality experiences and expect high quality recreation facilities across the spectrum of outdoor settings. This means that accessible facilities and information about what

[60] Tourism Industry Association New Zealand, *Submission To Inform The Outdoor Recreation Review*, 2007
[61] Department of Conservation, *Destination management framework: A new approach to managing destinations*, 2011

opportunities exist are becoming increasingly important as more people choose to participate in informal recreation activities that are close to home and completed in one day.[62]

The packaging and promotion of experiences is important. With a reduced skill set and knowledge of the outdoors as well as less disposable time, both international and domestic visitors need to be able to easily identify the experiences that are available in a region. Seeking activities that take under one day to complete means that experiences need to be packaged up in a way that is easily accessible, requires limited commitment and for which there are alternatives should the weather or other factors be unfavourable. Regions are encouraged to consider the total interests of visitors and their travel companions, offering a range of activities to experience the natural environment. An example is the sale of Taupō trout fishing licences which have reduced by over 23% over the last several years. While Taupō has an enduring strength in freshwater fishing, visitors are likely to travel with other family members with differing interests. To increase visitor numbers fishing could be linked to wider tourism experiences available in the area such as mountain biking and other activities.[63] Outdoor experiences can also be aimed at schools as this can play an important role in introducing young people to the outdoors and help build skills that will support their ongoing participation.[64]

Overuse of natural resources or "intensification" is a potential issue for DOC as it continues to meet the requirements of visitors – and the more attractive destinations are to people engaging with the natural environment the more this is likely to be a concern. As visitation to DOC destinations increases there is a need to balance conservation requirements to maintain the natural experience that people seek. While part of DOC's purpose is to provide opportunities for recreation and commercial use of conservation land, its objective is also to maintain and protect. The range of ways in which people engage with DOC destinations has the potential to create situations of conflict between groups and increased participation overall could lead to a negative impact on the environment. Settings for outdoor recreation need to be managed to protect them while providing opportunities for recreation activities.[65] Furthermore providing an escape from the stresses of everyday life is a critical role of outdoor recreation and uncrowded natural environments are an essential element of this[66]; meaning that increasing visitor numbers may well detract from the core experience being offered. This indicates that regions should offer multiple experiences that appeal to visitors' desire for easily accessible outdoor activities, therefore spreading visitor numbers across destinations.

As illustrated overleaf, key opportunities to encourage further outdoor participation include developing and promoting additional draw card destinations to spread engagement and encourage visitor flows across the TWT Conservancy. Each region within the conservancy currently has its own strengths and potential areas of development. It is recommended that DOC continues to work with Regional Tourism Organisations to consider the total experience that attracts visitors to a region and develops destinations that deliver on visitor expectations. This includes developing existing destinations so that they are appealing throughout the year and not just summer or winter. Broadly, Tongariro appears to be well balanced in terms of supply and demand for destinations and it is recommended that the area continues to promote its alpine and lake regions and develop existing infrastructure as popularity grows. Wanganui has the potential to link the conservancy if visitors are aware of specific attractions in the region – particularly along the Wanganui Journey and Mountains to Sea Cycle Trail. While some visitors may cross TWT areas via DOC destinations (such as the Wanganui River Journey and Forgotten Highway) the majority of visitors will use road networks to travel between regions. As such the development of key attractions along central roads is likely to attract people

[62] Sport New Zealand, *Outdoor Recreation Strategy 2009–2015*, 2009
[63] APR Consultants (prepared for DOC), *Taupō Fisheries Economic Analysis*, 2012
[64] Sport New Zealand, *Outdoor Recreation Strategy 2009–2015*, 2009
[65] Sport New Zealand, *Outdoor Recreation Strategy 2009–2015*, 2009
[66] Lovelock, B., Jellum, C. and Thompson, A. *Understanding Commitment and Involvement in Outdoor Recreation in New Zealand*, University of Otago, 2011

towards Wanganui's main centre from Tongariro and onto Taranaki. The alpine region of Mount Taranaki has the potential to become a highly desired New Zealand destination among domestic and international visitors, following the popularity of the Tongariro Alpine Crossing. This combined with promoting the Taranaki coastline (in line with Venture Taranaki tourism messaging) is likely to increase the overall appeal of Taranaki and encourage visitor flows from Wanganui and Tongariro.

Map of Potential TWT Destination Priorities

Develop and promote single day activities based around the **Mt Taranaki Alpine Region**.

Develop existing infrastructure in the **Tongariro Alpine and Lake Region** to accommodate increasing popularity.

Increase awareness of specific activities along the **Whanganui Journey** and encourage visitor flows across the TWT conservancy, from Tongariro/Lake Taupō to Taranaki.

4.3 New tourism and marketing approaches

Several new tourism product, service and marketing approaches have been recommended in light of the global changes in tourism demand:[67]

- Consumers should be educated to want new outdoor and adventure products which match environmental constraints.
  - For the TWT areas, diversification of available activities is the key, in line with targeted marketing to 'educate' the visitor on the variety of experiences on offer.

- Niche products should be developed for local communities based on the strengths of local assets.
  - The Mountain to Sea Cycle Trail is one example where this is already taking shape in the region.
  - Other niche products based around local attractions, especially around the existing Icon, Gateway, Backcountry and Local Treasure destinations, will increase demand whilst at the same time spread this demand and provide additional benefits to the region.

- Experiences of the 'real destination' (i.e. authentic experiences) should be developed more widely.
  - Again drawing on the specific strengths and unique visitor proposition of the individual TWT regions, authentic experiences such as unique cultural and heritage attractions will stimulate demand.

- Industry needs to educate the New Zealand population that the regional product can be exciting and different to overseas.
  - TWT Conservancy covers a variety of geographical features, such as coastal, alpine, lakes, rivers and rural, which can provide exciting experiences on 'people's doorstep' (in a domestic tourism and local recreational perspective).

- Industry should better attempt to capitalise on the domestic short stay, time-poor market.
  - Due to shorter stays and changes in activity preferences, accessibility and target marketing to domestic (and local) segments should be prioritized.

- Industry needs to better appreciate the benefits of cooperative product and new service development.
  - The local tourism expert interviews confirmed that there are definite opportunities for DOC to increase cooperation with local industry in developing targeted products and services in the TWT areas.

- Enterprises should better link into new transport opportunities from increased air travel, e.g. increased development of local destination tours, both group and self drive/hire.
  - For the TWT regions this would primarily translate into improved accessibility to more remote areas off the main tourist routes.

- It is important for the survival of business to ensure that its products do not become old or tired but are continually refreshed.
  - Specifically the popular Icon destinations need to be not only sustainably maintained to cater to increased demand but should also be complemented with new experiences where possible e.g. added cultural/educational aspects.

---

[67] Dwyer L., *Megatrends underpinning tourism to 2020: Analysis of key drivers for change*. STCRC 2008

- Focus on a ‘service culture’.
  - A holistic view on customer service is important, which includes seamless integration of DOC products and services with local operators and partners.

- Explore ambient technologies to interface with the visitor at multiple levels in the destination, as well as to value-add the individual products and experiences.
  - New information and communication technology can enable a closer interaction with TWT destinations. Information websites and apps such as the Tongariro Pocket ranger are examples of this approach.

- It will be important for destination managers to create differential experiences in their destinations to set themselves apart from competitor destinations.
  - This can be facilitated by capitalising on the unique visitor proposition of the individual TWT regions.

4.4 SWOT of TWT Conservancy

Strengths

A core strength of the TWT Conservancy is its diversification of outdoor experiences. This includes experiences that require a range of physical engagement, suit people with varying interests and capabilities, and are available during all seasons. Certain areas are also known for their relaxed urban experiences, particularly the main towns of New Plymouth and Wanganui. Being able to offer anything from more sedate activities to extreme adventure as well as snow sports in winter and mountain biking or tramping in summer is advantageous. As a result, the region can cater to visitors of all skill levels, provides a number of alternatives to activities that are weather dependent and is able to accommodate the interests of entire travel groups.

Some of New Zealand’s key outdoor experiences are offered throughout the region with several of DOC’s iconic and gateway destinations – including two Great Walks – in Tongariro, Wanganui and Taranaki. These are central to the types of activities believed to be available in each area. Tongariro is perceived as offering mainly alpine experiences based around the central North Island volcanic zone and, in particular, the Tongariro Northern Circuit; Wanganui offers experiences based around the river and Wanganui Journey great walk; and Taranaki is seen as offering outdoor experiences centred around Mt Taranaki and its coast line. These key outdoor experiences create a potential platform for the TWT regions to be promoted both individually and collectively to increase awareness of the specific activities and destinations that can be experienced among domestic and international visitors.

The development of cycle trails is also a strength of the TWT. There appears to be rising visitor demand for the cycle trails alongside a commitment from DOC and others to improve the experiences that are currently available. The Mountains to Sea Trail for example is popular, running from Tongariro and through the Wanganui National Park. Having the cycle trails adds to the types of experiences on offer and provides complementary activities to the region’s great walks and ski fields. The cycle trails are particularly appealing to visitors as the duration of the activity is dependent on the user, they can be enjoyed by people of varying skill levels and visitors with different interests can cycle to any number of locations. Cycle trails have helped regions within the TWT become more appealing throughout the year. Tongariro in particular has had a recent increase in summer visitors to balance its winter season. The continued development of existing infrastructure to accommodate summer and winter activities is recommended to promote year round use in TWT regions.

Weaknesses

The biggest potential restriction on the number of people experiencing the TWT region's destinations is access (both by virtue of the conservancy's geographic spread and its proximity to central transportation routes). Not only does the TWT conservancy cover a relatively large area but the majority of its destinations are off the North Island's main highway between Auckland and Wellington. Auckland is a hub for New Zealand's international visitors with many people from overseas arriving and/or departing from Auckland. Visitors then tend to travel down the country through Rotorua and on to Wellington (or do this in reverse from the south) – meaning they do not enter the majority of Tongariro, Wanganui or Taranaki. Being off the main highway and core domestic flight routes is also likely to restrict domestic visitor numbers.

This issue can be addressed by improving transportation routes and providing compelling reasons for people to visit the TWT region. While improving visitor flows via highways and flight routes may be difficult, more people are likely to visit the conservancy if its destinations are considered "must do" and seen to cater for travel parties with multiple interests. The Tongariro Alpine Crossing is an example of a TWT destination that has become a high profile experience, able to attract both domestic and international visitors. Part of the alpine crossing's appeal is that it takes walkers across the volcanic plateau and can be completed by most people in one day. Promoting several such experiences spread across the conservancy will increase awareness among New Zealanders and international audiences of what TWT regions have to offer and provide core reasons to visit. Packaging and promoting multiple activities within one area is also likely to attract visitors. Having year round activities suitable for varying weather conditions and to suit differing levels of outdoor experience will make the TWT conservancy more appealing to individual visitors as well as groups such as families and schools.

Opportunities

There are a number of trends creating opportunities to strengthen visitor engagement within the TWT conservancy. One such trend is that people are increasingly interested in short, easily accessible soft adventure activities. For many people experiencing nature is considered a break from the everyday. They look to switch easily from their everyday life into New Zealand's natural environment and back again – escaping the normal routine to be immersed in nature for a relatively short period of time. Given the chance, visitors want to be actively involved in nature but perceived access is important. This includes geographic and physical access: i.e. while the location of DOC destinations need to be such that people can get to them, they also need to be physically manageable for visitors with a range of outdoor knowledge and skill levels.

Such a desire for experiences requiring limited commitment in terms of time and resources presents an opportunity to package and promote DOC destinations in a way that appeals to this need. Collaboration with Regional Tourism Organisations (RTOs) and other operators of visitor experiences is likely to be effective in this regard. Visitors to DOC destinations will consider all of the activities and attractions a region has to offer, both natural and otherwise, and RTOs can help promote DOC offerings in the context of this wider product set.

As mentioned above, partnerships with the local tourism industry creates an opportunity to present a variety of experiences to the market – helping to attract and sustain demand. Large players such as Ngai Tahu Tourism (Huka Jet, Rainbow Springs), Ruapehu Alpine Lifts and the Regional Tourism Organisations for example are ideal collaborators for the type of experiences DOC provides and vice versa. Given that each of these parties has existing assets, knowledge, distribution channels and a commitment to tourism development in the areas in which they operate, a key opportunity for DOC is to consider ways of collaborating at this stage.

Although New Zealand as a whole is seeing international visitor growth from China, regional experts advise that the majority of the TWT Conservancy has sustained visitor numbers from more traditional visitor markets such as the United Kingdom and North America (which at the national level have been declining). International visitors from the European and American markets are interested in experiencing Maori culture and there is an opportunity to strengthen the cultural aspects of the conservancy's destinations. There is also continued demand for walks and cycle trails in the TWT from both domestic and international users. Walks and cycle trails meet public demand for outdoor experiences that have the flexibility to accommodate visitors' varying ability, interests and time constraints. Developing and promoting these experiences should continue to be a priority. People need to understand what each experience has to offer and the way they are marketed is important. Factors such as key points of interest, track facilities, required skill and entry/exit points help visitors decide where they will go and what they will do when there.

Ways to create more explicit linkages across the region to encourage the flow of visitors from the more popular TWT destinations (i.e. Taupō and Tongariro) to the lesser known, or less popular destinations (i.e. Taranaki and Wanganui) should be created and promoted. For example cross TWT cycle trails, river journeys, mountain challenges etc.

Threats

There are several threats that DOC will need to manage as it focuses on public engagement with the natural environment. One threat is over use of TWT destinations. While the appeal of many destinations is that they are not crowded, this has the potential to become compromised as they become more popular. One way to pre-empt perceptions of over use is to ensure there are adequate facilities in place and to encourage visitation across the conservancy by actively promoting multiple Icon and Gateway destinations. Volcanic activity and variable weather further reinforce the need to promote multiple destinations as easily accessible alternatives for when conditions are unfavourable. While volcanic landscapes and an alpine climate are part of what makes the TWT conservancy unique they are also a threat to visitor access – as seen most recently on the Tongariro Alpine Crossing.

Any environmental compromises such as mining or pollution also have the potential to limit the appeal of the conservancy's destinations. Although this may impact the appeal of TWT regions, part of DOC's purpose is to protect the environment and it is expected the Department has plans in place to manage such threats. Similarly tourism sector considerations such as a variable New Zealand dollar have a potential influence on visitor numbers. As DOC increasingly sees itself working alongside and within the tourism sector, it will need to maintain its awareness of international and domestic visitor trends.

4.5 TWT Conservancy regional implications

The specific opportunities and challenges for each TWT resulting from the general trends and local supply situation are outlined in summary for in this section, including a external environment or PEEST analysis, followed by a local level SWOT analysis.

Taupō

Political environment - influencers for the area:

- Local Iwi relations, access and land claims. Potential impact of treaty settlements in the region and commercialization of Iwi owned natural assets impacting tourism access either positively or negatively.
- Change to Local Government Act redefining Council's role and potential negative impact on public destination investments.
- Support by national and regional government especially in relation to infrastructure developments and conservation/access.
- Possible amalgamation of Taupō, Ruapehu and Rotorua RTOs and impact on local level decision making ability.

Economic environment - influencers for the area:

- Visitation numbers remain solid for both domestic and international markets and are tipped to increase for the international markets.
- Stay lengths are also stable in the domestic market with a slight upward trend in the international market. This is contrary to overall New Zealand visitation trends which show a shortening of stay length in the country. It confirms feedback from the region that the area is not experiencing a downturn but has sustained demand.
- Overall purchasing power is declining slightly due to general economic factors in overseas and domestic visitor markets (e.g. recession, high prices for goods and services). However the 'right' product for the right customer will alleviate a drop in spending. Tourism expenditure in the Taupō area is declining slightly, whilst domestic tourism expenditure remains stable.

Environmental influencers for the area:

- Climate change impact on winter season, with the shift already visible, and the development of alternatives underway e.g. cycle trails.
- Volcanic eruptions could either stimulate or detract depending on impact.
- Water pollution is a possible threat to fishing in the lakes and rivers.
- General land overuse and pollution through uncontrolled mass tourism at iconic sites.
- Free draining volcanic soils enable use of tracks and trails year round constituting an advantage in cross seasonal outdoor activities, which would otherwise be constrained by adverse weather conditions.

Social change - influencers for the area:

- The changing nature of the consumer characteristics and needs on a global scale is also evident in New Zealand. Development of appropriate products and services, as well as targeted marketing will become important.
- Taupō is well placed in meeting the changing preferences of new travelers. The area offers a wide variety of sought after attractions. The trend towards easily accessible and shorter activities based around iconic attractions can be met by the existing supply of 'DOC product' and other destinational infrastructure.

Technological developments – influencers for the area:

- Increasing connectivity of the destination with the target markets through internet marketing strategies, accessible-, relevant booking channels and sales relationships (e.g. wholesalers) will become increasingly important.

SWOT

Strengths

- Lake and rivers – water sports and trout fishing.
  - Lake Taupō and surrounding waterways are an iconic drawcard to the region.
- Adventure activities – jet boating and rafting etc
  - Variety on offer, utilizing iconic Lake Taupō and surrounding waterways.
- Relatively close to major international tourist destination of Rotorua.
  - Access to the region is an advantage in attracting visitor numbers/different markets.
- Location on major tourist routes.
  - A key location along the major North Island tourist flow route.
- Iconic scenery
  - Unique and 'famous' scenery of Lake Taupō and volcanoes.
  - Huka Falls.
- Variety of activities including water activities, land activities (e.g. established cycle trails, walks), complementing urban experiences in Taupō (e.g. shopping, restaurants, hotels).

Weaknesses:

- Reliance on water-related activities.
  - Even though this is also classified as a strength, from a destination marketing perspective the Lake is the major drawcard to Taupō.
- Require draw-card destinations to attract international visitors.
  - Especially applicable to new emerging markets such as Chinese visitors.

Opportunities:

- Manage demand/supply in relation to the points below
- Short immersion activities, authentic experiences, including cultural experiences.
- Status as 'nature playground' and a variety of activities on offer. Opportunity to capitalize on these USP's in cooperation with RTO/industry.
- Sustained demand from traditional markets.
- Major attractions in close proximity enable a wider spread of demand from icon attractions.
- High value niche products for new markets e.g. China.
- Re-opening of Tongariro Crossing.
- Interconnection of cycle ways, including accommodation and package options.

Threats:

- Increasing competition to attract visitors.
  - Potential to draw existing or potential new markets 'away' from the region.
  - Targeted destination and product marketing will increase in importance.
- Changing international markets – from traditional western markets to Asia.
  - A potential change for the region in the future raising the need to develop 'connections' with these new markets through niche product development and the establishment of industry relationships.

Tongariro

Political environment - influencers for the area:

- Local Iwi relations in the Tongariro area.
- Support by national and regional government especially in relation to infrastructure developments and conservation/access.
- Possible amalgamation of Taupō, Ruapehu and Rotorua RTOs and impact on local level decision making ability.

Economic environment - influencers for the area:

- Visitation numbers remain stable for both domestic and international markets.
- Stay lengths are also stable in the domestic and international markets. This is contrary to overall New Zealand visitation trends which show a shortening of stay length in the country and confirms feedback from the region that the area has not experienced a downturn but has sustained demand.
- Overall purchasing power is declining slightly due to general economic factors in overseas and domestic visitor market (e.g. recession, high prices for goods and services). However the 'right' product for the right customer will alleviate a drop in spending. Tourism expenditure in the Ruapehu/Tongariro area is increasing slightly, whilst domestic tourism expenditure shows a declining trend.

Environmental influencers for the area:

- Climate change impact on winter season especially applicable to the area due the winter sport industry, shift already visible and the development of alternatives has begun e.g. cycle trails.
- Volcanic eruptions could either stimulate or detract depending on impact.
- General land overuse and pollution through uncontrolled mass tourism at iconic sites.

Social change - influencers for the area:

- The changing nature of the consumer characteristics and needs on a global scale is also evident in New Zealand. Development of appropriate products and services, as well as targeted marketing will become important.
- Like Taupō, Tongariro is well placed in meeting the changing preferences of new travelers. However the immediate area does not offer a <u>wide variety</u> of sought after, active outdoor-unrelated or complementary attractions, such as urban experiences (as available in Taupō) or weather independent activities. The Tongariro/Ruapehu area is however strong in niche product such as iconic walks, winter sport and other outdoor activities such as cycling. The trend towards easily accessible and shorter duration activities based around iconic attractions can be met by the existing supply of 'DOC product' and other destinational infrastructure with a <u>niche focus</u>. The relatively close vicinity to Taupō's attraction also enables leveraging supply and demand to some degree.

Technological developments – influencers for DOC

- Increasing connectivity of the destination with the target markets through internet marketing strategies, accessible-, relevant booking channels and sales relationships (e.g. wholesalers) will become increasingly important. This applies to all regions equally.

SWOT

Strengths

- Alpine area – particularly the Tongariro Crossing.
- Skiing and winter sports.

- World Heritage Status means 'must do', iconic drawcards.

Weaknesses

- Reliance on Tongariro Crossing – influenced by weather and volcanic activity.
- Focus on winter activities.
  - In light of global warming and sometimes adverse weather conditions, there are relatively few alternatives to winter sport in this season. At the same time, there are fewer drawcards, especially for domestic visitors during the summer season.

Opportunities

- Develop destinations so that they are appealing to visitors throughout the year, such as skiing and mountain biking.
- Short immersion, single-day activities to address the needs/wants of new travellers.
- Develop other draw card destinations to spread demands on the Tongariro Crossing and provide an unfavorable weather alternative.

Threats

- Management of increased demand on the Tongariro Crossing.
  - Important to maintain and 'refresh' this product.
- Reliance on snow – require alternative activities for poor snow fall or unfavorable weather conditions.

Taranaki

Political environment - influencers for the area:

- Aspects of access and governance of Mt.Taranaki. Outcomes of industry lobby groups for more tourism access/opportunities on the mountain.
- Support by national and regional government especially in relation to infrastructure developments and conservation/access.

Economic environment - influencers for the area:

- Visitation numbers remain stable for both domestic and international markets. Taranaki is the third most popular tourist region in the TWT Conservancy.
- Stay lengths are also stable in both the domestic and international markets. This is contrary to overall New Zealand visitation trends which show a shortening of stay length in the country and confirm feedback from the region that the area has not experienced a downturn but has sustained demand.
- Overall purchasing power is declining slightly due to general economic factors in overseas and domestic visitor market (e.g. recession, high prices for goods and services). However the 'right' product for the right customer will alleviate a drop in spending. Tourism expenditure in the Taranaki area is in fact increasing from both domestic and international visitors.
- Expanded air linkages to New Plymouth Airport will provide increased tourism flows to the area.

Environmental influencers for the area:

- Natural forces such as climate change have probably less of an impact on the area.
- General management of pollution of waterways and the environment is applicable as to all regions.
- The most influential factor for Taranaki is the increasing expansion of the oil and gas industries and the possible risks to the environment. This is especially applicable to the coastal areas.

Social change - influencers for the area:

- The changing nature of the consumer characteristics and needs on a global scale is also evident in New Zealand. Development of appropriate products and services, as well as targeted marketing will become important.
- Taranaki's main attraction is Mt Taranaki. Even though the mountain and surrounds do offer accessibility from New Plymouth and the Taranaki region in general, the region is off the major tourism routes, which will inhibit easy access for the new time-strapped traveler. Shorter activities are also present but due to a distinct lack of a variety of iconic 'must do' attractions, an emphasis of the area is to develop more options to increase demand. Developments to diversify recreational and tourist attractions is underway with a variety of different attractions in the pipeline as outlined in section 3.2.1. These include new cycle and walk ways on the coast and Mt Taranaki, golf cart trail line through East Taranaki, gondola development in the Egmont National Park and a historic heritage trail. All attractions have the potential to cater to the demand for accessible, active and 'immersive' experiences.

Technological developments – influencers for DOC

- Increasing connectivity of the destination with the target markets through internet marketing strategies, relevant booking channels and sales relationships (e.g. wholesalers) will become increasingly important. This applies to all regions equally. Since Taranaki has fewer of the recognized iconic must do attractions than Taupō and Tongariro, efforts in the internet marketing space may improve the image and especially knowledge of the area.

SWOT

Strengths

- Mt Taranaki and the surrounding alpine area.
  - Status as THE major iconic 'must do' attraction in the region.
  - Mt Taranaki is the drawcard to the region, especially for international visitors.
- Coastal – Alpine dynamic/variety.
  - Unique aspect of Taranaki to be able to experience both geographic features in close proximity.

Weaknesses

- Isolation from other TWT regions and main New Zealand tourist routes in general.
  - Access is the main weakness.

Opportunities

- Growing air traffic into New Plymouth bringing increased visitor numbers.
- Develop more iconic experiences on Mt Taranaki (similar to the Tongariro Crossing visitor offering).
- Connecting cultural heritage of Mt Taranaki with the central plateau/volcanoes and Wanganui river ('sacred pathways').

Threats

- Environmental risks from oil and gas mining.
- Further isolation from tourist routes in light of shorter trips and iconic attractions in close proximity available in the Tongariro/Taupō areas.

Wanganui

Political environment - influencers for the area:

- No specific political influences could be identified in the scope of this review.
- Support by national and regional government especially in relation to infrastructure developments and conservation/access is repeated here since this is a factor that influences all regions.

Economic environment - influencers for the area:

- Visitation numbers remain stable for both domestic and international markets. Wanganui is the least popular tourist region in the TWT Conservancy. Compared to the other TWT areas, Wanganui has a strong reliance on domestic visitation.
- Stay lengths are also stable in both the domestic and international markets. This is contrary to overall New Zealand visitation trends which show a shortening of stay length in the country.
- Overall purchasing power is declining slightly due to general economic factors in overseas and domestic visitor market (e.g. recession, high prices for goods and services). However the ‘right’ product for the right customer will alleviate a drop in spending. International tourism expenditure in the Wanganui area is declining, whilst domestic tourism spend shows a slight upward trend.
- Expanded air linkages to New Plymouth Airport will provide increased tourism flows to Taranaki with the potential to increase visitor numbers to Wanganui as well.

Environmental influencers for the area:

- Natural forces such as climate change have probably less of an impact on the area.
- General management of pollution of the Wanganui River is of particular importance here given the iconic status of this attraction.

Social change - influencers for the area:

- The changing nature of the consumer characteristics and needs on a global scale is also evident in New Zealand. Development of appropriate products and services, as well as targeted marketing will become important.
- Wanganui’s main attraction is the river (i.e. Wanganui Journey, Raukawa Falls) and increasingly the Mountains to Sea Cycle Trail. Like Taranaki, the region is off the major tourism routes, which will inhibit easy access for the new time-strapped traveler. Increasing the region’s attractiveness to potential international visitors based on the unique assets of the area (i.e. the river and cycle trail) can strengthen demand for the area. Developments on these two main attractions are being considered with added accommodation options, cycling options and other tourism services.

Technological developments – influencers for the area:

- Increasing connectivity of the destination with the target markets through internet marketing strategies, relevant booking channels and sales relationships (e.g. wholesalers) will become increasingly important. This applies to all regions equally. Since Wanganui has fewer of the recognized iconic must do attractions such as Taupō and Tongariro, efforts in the internet marketing space can improve the image and especially knowledge of the area.

SWOT

Strengths

- The Wanganui River and river related activities, including cycle trails.
  - The single most iconic regional tourism drawcard.

Weaknesses

- Reliance on the Wanganui Journey.
  - The area does not offer a perceived variety of attractions/alternatives.
- Not a particularly popular international tourist destination.

Opportunities

- Develop and promote specific activities along the Wanganui River for visitors to experience.
- Encourage repeat visitation by developing multiple destinations.
- Tying in with coastal experiences in Taranaki (for example coastal cycling)

Threats

- Although not likely, any restriction to river access is a possible threat.
- As for Taranaki, further isolation from tourist routes in light of shorter trips and iconic attractions in close proximity available in the Tongariro/Taupō areas.

5.0 Appendices

Appendix 1

TWT Regional Tourism Report
Stakeholder Interview Guide

1. Introduction

- Explain background and purpose (i.e. commissioned by DOC to prepare a report on regional tourism and outdoor recreation opportunities in the TWT area)
- Explain reason for selection of stakeholder (i.e. well-positioned to comment on recent developments and opportunities in the Taupō area)

2. Status Quo / Prospects

- How would you describe the TWT region (and sub-regions) as destinations for tourism and outdoor recreation at present? How has this changed over time?
- In what respects is the region/sub-regions strong? And weak? For what reasons?
- What do you see as the major trends affecting the TWT region (and sub-regions) from a tourism and leisure perspective? How do you expect these trends to 'play out' over the next few years (e.g. changing market composition, changing consumer preferences, changing consumer behaviour mean xyz for the region)?
- To what extent do you think these trends will affect TWT specifically (vs. all regions)?
- To what extent do you think these trends will affect sub-regions within TWT differently (if at all)?
- What do you see as the key tourism and leisure **opportunities** for the region? What action do you think will be required to make the most of these opportunities? By whom?
- What do you see as the main **threats** faced by the region (from a tourism and leisure perspective)? What action do you think will be required to avert these threats? By whom?

3. Priorities

- What sites/locations/products within the TWT region do you think are best positioned to meet the needs of international visitors now and into the future? And domestic visitors? And the leisure needs of local residents?
- If increasing participation in nature-based tourism and outdoor recreation is the objective, what would you see as the priorities for investment by DOC and other parties? E.g. Investment in specific sites? Investment in specific types of activities or types of development? Specific forms of investment or intervention (e.g. partnerships)?

4. Supply-Side Developments

- What developments are you aware of that might affect the region's tourism and leisure prospects – positively or negatively - over the next few years? E.g. any plans by central government/ local government/private sector; any plans relating to infrastructure, activities/attractions etc.?
- Who are the key players in regard to each?
- How do you expect these to affect the region/sub-regions?

Appendix 2

Taupō area:

Destination Name	Destination type	Estimated Visitor numbers
Huka Falls	Icon	605,000
Tongariro Alpine Crossing	Icon	82,500
Tongariro National Trout Centre	Icon	58,000
Mid Tongariro River Walks	Icon	45,000

Destination Name	Destination type	Estimated Visitor numbers
Upper Waikato River Tracks	Gateway	70,000
Lake Rotopounamu	Gateway	30000
Tongariro Northern Circuit	Gateway	6500

Destination Name	Destination type	Estimated Visitor numbers
Tongariro River TR access track	Backcountry	12,000
Clements Mill Road	Backcountry	10,300
Tongariro River TL rds/tks	Backcountry	8,000
RTM-Ohinepango Spg 2 Waihohonu	Backcountry	5,500
Waiotaka River access track	Backcountry	5,000
Tauranga Taupō River access track	Backcountry	5,000
Poutu Intake Rd & Waikoko Campsite	Backcountry	3,500
Te Iringa Track	Backcountry	3,400
Urchin Road	Backcountry	2,500
RTM-Ohinepango-Wahianoa River	Backcountry	2,500
Te Iringa - Oamaru Hut Track	Backcountry	2,500
Boyd Hut -Oamaru Hut Tk -via Ngaruroro R	Backcountry	2,200
Ngapuketurua Tk-Kiko Loop-Cascade Hut	Backcountry	2,000
Hinemaiaia Tk-Cascade Hut-Clements Rd	Backcountry	2,000
Te Hapua Easement Track	Backcountry	2,000
Umukarikari Track and Road	Backcountry	1,500
Urchin Tk-Urchin Crpk-Urchin Trig	Backcountry	1,500
Cascade-Boyd via Te Waiotupuritia Stm Tk	Backcountry	1,200
Glen Track (Access to Waihaha Bay)	Backcountry	800
Poronui Access Route (DoC part only)	Backcountry	500
Waipakihi River to Mt Urchin Track	Backcountry	500
Boyd-Cascade via Maungaorangi high point	Backcountry	500
Ngapuketurua to Waipakihi Hut Track	Backcountry	500
POH to Desert Road Track	Backcountry	500
S Acces Corridor-Desert Rd-Otamateanui R	Backcountry	400
Kaipo Valley to Cascade Stream Track	Backcountry	300
Thunderbolt Route	Backcountry	200
Whangaehu Hut (NZAC)	Backcountry	100
Hihitahi Forest Track (to Zekes Hut)	Backcountry	100

Destination Name	Destination type	Estimated Visitor numbers
Tokaanu Hot Pools and Car Park	Local Treasure	135,000
Tokaanu Thermal Walk	Local Treasure	65,000
Aratiatia Rapids Viewpoints Walk	Local Treasure	40,000
Aratiatia Road	Local Treasure	35,000
Blue Pool Toilet	Local Treasure	30,000
Whakaipo Bay Amenity Area	Local Treasure	22,000
Hinemaiaia River roads/access tks	Local Treasure	18,000
W2K Track	Local Treasure	17,000
Awaroa Picnic Area and Walk	Local Treasure	16,000
5 Mile Bay Picnic Area & Lions Walk	Local Treasure	15,500
Huka to Aratiatia walkway/picnic area	Local Treasure	15,000
Kawakawa Bay Walk and Picnic Area	Local Treasure	15,000
Waitahanui River access tracks	Local Treasure	13,500
Kaimanawa Road (section 1)	Local Treasure	12,800
Maunganamu Road	Local Treasure	10,000
Omori Stream - Omori Boatramp Walk	Local Treasure	10,000
Whangamata Stream tracks	Local Treasure	10,000
Pukawa - Omori Walk	Local Treasure	10,000
Hatepe Picnic Area	Local Treasure	10,000
Omori Stream Car Park	Local Treasure	10,000
Waikari Reserve Loop Track	Local Treasure	10,000
Oruatua Picnic Area	Local Treasure	10,000
Kaimanawa Road (sections 2, 3, and 4)	Local Treasure	9,200
Waituhi Viewpoint	Local Treasure	8,000
Waimarino River road/access tk	Local Treasure	8,000
Opepe Historic Graves Walk	Local Treasure	8,000
Pukawa Loop & Upper Walk	Local Treasure	8,000
Tukino Road - SH1 to Skifield	Local Treasure	7,500
Crescent Reserve Access Rd-Tongariro R	Local Treasure	7,000
Rangitira Point -Whakamoenga Point Walks	Local Treasure	6,500
Opepe Redoubt Historic Site & South Walk	Local Treasure	6,000
Te Porere Walks	Local Treasure	6,000
Tokaanu Wharf	Local Treasure	6,000
Mission Bay Amenity Area	Local Treasure	5,000
Oruatua Walk	Local Treasure	5,000
Kiko Road & Track	Local Treasure	5,000
Te Aho Picnic Area	Local Treasure	4,000
Kapua Road Picnic Area	Local Treasure	4,000
Maunganumu Walk	Local Treasure	4,000
Te Iringa Campsite/Carpark	Local Treasure	4,000
Waipehi Walk	Local Treasure	4,000
Opepe North Walk	Local Treasure	3,000
Waihi Picnic Area	Local Treasure	3,000
Tree Trunk Gorge Track	Local Treasure	3,000
Rangitaiki Road	Local Treasure	2,500
Whareroa Lakeside Walk	Local Treasure	2,000
Motuoapa Lookout Walk	Local Treasure	2,000
Waihaha Picnic Area and Car Park	Local Treasure	2,000
Tauranga Taupō River Walk	Local Treasure	2,000
Parikarangaranga Picnic Area	Local Treasure	2,000

Urchin Campsite	Local Treasure	1,800
Kaimanawa Road Forest Loop Walk	Local Treasure	1,000
Waipakihi Road	Local Treasure	1,000
Urchin Campsite-Pillars of Hercules Walk	Local Treasure	1,000
Clements Clearing Campsite	Local Treasure	650
Waituhi Road	Local Treasure	500
Rangipo Intake Road	Local Treasure	400
Army Road Campsite	Local Treasure	300
Clements Roadend campsite/carpark	Local Treasure	300
Kaimanawa Road Campsite	Local Treasure	300
Kakapo Campsite	Local Treasure	200
Pirua Campsite	Local Treasure	200
Paengaroa SR Track	Local Treasure	150
Misc. signs - Turangi/ Taupō Area	Local Treasure	0

Tongariro

Destination Name	Destination type	Estimated Visitor numbers
Tongariro Alpine Crossing	Icon	82,500
Old Coach Road	Icon	10,500

Destination Name	Destination type	Estimated Visitor numbers
Whakapapa Village walks	Gateway	40,000
Tongariro Northern Circuit	Gateway	2,500

Destination Name	Destination type	Estimated Visitor numbers
Dome volcanic eruptn/Lahar warning shltr	Backcountry	14,000
RTM tk-Ohakune Mtn Rd -Lake Surprise	Backcountry	6,000
Dominion Road- (Tongariro Forest Access)	Backcountry	6,000
Kapoors Rd -Tongariro Forest/42 Traverse	Backcountry	5,000
42 Traverse-Slab Rd crpk-Dominion Rd cpk	Backcountry	5,000
RTM Tk-Waitonga Falls to Mangaehuehu Hut	Backcountry	4,000
Whakapapaiti Valley Track	Backcountry	3,000
RTM tk-Bruce Rd-Whakapapaiti Vally tk jn	Backcountry	3,000
Blyth Hut track	Backcountry	3,000
Erua Forest Mtb tks-Access via Middle Rd	Backcountry	2,000
RTM tk-Whakapapaiti Vally tk jn-L Surprise	Backcountry	2,000
Top and Clymo Tracks	Backcountry	2,000
RTM Tk-Mangaehuehu Hut to Wahianoa River	Backcountry	2,000
Kapoors-Frost Flat - 42 Traverse/Slab Rd	Backcountry	1,000
Old Blyth Track	Backcountry	1,000
Mangahuia Track	Backcountry	1,000
Waione/Cokers-(to Mangatepopo Stream)	Backcountry	750
Horopito Track	Backcountry	600
South Pylon Access Track	Backcountry	500
Pokaka Mill -Slab Rd (to 42 Traverse) tk	Backcountry	500
N Pylon Access Tk/Erua Pylon Mtb Routes	Backcountry	500

Destination Name	Destination type	Estimated Visitor numbers
Bruce Road (CS)	Local Treasure	454,000
Whakapapa Visitor Centre carpark/toilets	Local Treasure	244,441
Whakapapa Village Bus Park	Local Treasure	100,000
Ngauruhoe Place, Whakapapa Village (CS)	Local Treasure	35,000
Mangawhero Falls Walk	Local Treasure	25,000
Waitonga Falls Walk (RTM Track link)	Local Treasure	20,000
Rimu Walk	Local Treasure	16,000
Ohakune Visitor Centre Picnic Area	Local Treasure	8,136
Mangawhero Forest Walk	Local Treasure	8,000
Rotokura Walk	Local Treasure	8,000
John McDonald Rd-Tongariro Forest access	Local Treasure	7,500
Ohinetonga Road	Local Treasure	7,500
Pukehinau Road	Local Treasure	7,500
Okupata Caves Walk	Local Treasure	5,500
Rangataua Road-(Rangataua Forest Access)	Local Treasure	5,000
Ohakune Lakes Picnic Areas	Local Treasure	5,000
Rangataua Mountainbike Route - Middle tk	Local Treasure	5,000
Mangahuia Campsite	Local Treasure	3,500
Raurimu Spiral Viewpoint	Local Treasure	3,500
Mangawhero Picnic Area	Local Treasure	3,000
Taurewa Loop Walk	Local Treasure	2,500
Taurewa Lodge access rd	Local Treasure	2,000
Ohinetonga Picnic Area	Local Treasure	2,000
Mangawhero Campsite	Local Treasure	1,800
Pokaka Mill Campsite	Local Treasure	1,700
Ohinetonga Walk	Local Treasure	1,500
Misc. signs - South Ruapehu Area	Local Treasure	0
Misc. signs - North Ruapehu Area	Local Treasure	0
Tupapakurua Track	Local Treasure	0

Taranaki

Destination Name	Destination type	Estimated Visitor numbers
North Egmont (Maunga Taranaki)	Icon	101,427
Pukerangiora Pa - Potential Icon	Icon	2,500

Destination Name	Destination type	Estimated Visitor numbers
Stratford Plateau	Gateway	149,674
Dawson Falls (Maunga Taranaki)	Gateway	73529
Ratapihipihi	Gateway	7616
Tapuae Marine Reserve and SLIMPA	Gateway	3,087

Destination Name	Destination type	Estimated Visitor numbers
Northern Summit Route	Backcountry	7,520
Waimoku Track	Backcountry	5,848
Ridge Track	Backcountry	5,000
Ram Track	Backcountry	5,000
North Egmont Summit Tk (Translator Rd)	Backcountry	5,000
AMC Tahurangi - Manganui Skifield Track	Backcountry	4,296

Fanthams Peak Track	Backcountry	4,000
Mangorei Track	Backcountry	3,627
Hasties Hill Track	Backcountry	2,376
Kaiauai Track	Backcountry	2,171
Holly Hut Track	Backcountry	2,000
Waingongoro Track	Backcountry	2,000
Bells Falls Track	Backcountry	2,000
Pouakai Track	Backcountry	2,000
Curtis Falls Track	Backcountry	2,000
Maketawa Track	Backcountry	2,000
AMC- Humphries Castle Route	Backcountry	1,500
Kahui Track	Backcountry	1,500
Rerekapa Track	Backcountry	1,500
Brames Falls Track	Backcountry	1,500
Moki Track	Backcountry	1,500
Enchanted Track	Backcountry	1,447
Lower Lake Dive Track	Backcountry	1,047
Ahukawakawa Track	Backcountry	1,000
Kaiauai Carpark	Backcountry	1,000
Mt Messenger - Whitecliffs Track	Backcountry	1,000
Auroa Track	Backcountry	1,000
Fanthams Peak Route	Backcountry	1,000
Upper Lake Dive Track	Backcountry	1,000
Waitaanga South Track	Backcountry	1,000
Sefton Ridge Track	Backcountry	942
Ihaia Track	Backcountry	931
Stony River Route	Backcountry	800
Kapoaiaia Track	Backcountry	800
Mt Damper Track	Backcountry	750
Oaonui Track	Backcountry	713
Puniho Track	Backcountry	500
Taungatara Track	Backcountry	500
Mt Messenger to Kiwi Rd Track	Backcountry	500
Boars Head Mine Track	Backcountry	500
Maude Track	Backcountry	500
Davies Track	Backcountry	500
Tatu Track	Backcountry	500
Ngatoro Track	Backcountry	500
Kokowai Track	Backcountry	500
Awahou Track	Backcountry	300
Mangaoraka - Waiwhaikaiho Link Track	Backcountry	200
Dover Route	Backcountry	200
Waiwhakaiho tk	Backcountry	200
Waipapa Stream Hut	Backcountry	50
Kaupokonui Hut	Backcountry	50
Laurence's Hut	Backcountry	10
West's Hut	Backcountry	10

Destination Name	Destination type	Estimated Visitor numbers
East Egmont Amenity Area/Kamahi Loop Tk	Local Treasure	80,000
Lucy's Gully Roadend	Local Treasure	22,075
Connett Loop Track	Local Treasure	20,200
Mangaoraka Picnic Area	Local Treasure	10,000
Meeting of the Waters SR	Local Treasure	10,000
Everett Park Scenic Reserve	Local Treasure	10,000
Waitoetoe Beach Picnic Area	Local Treasure	5,000
Stony River (Hangatahua) Walkway	Local Treasure	4,581
Ridge Loop Track	Local Treasure	4,240
AMC-Enchantd Tk jn-Wilkies Pools Loop Tk	Local Treasure	3,500
Whitecliffs Walkway	Local Treasure	3,000
Sandy Bay/Oaonui	Local Treasure	3,000
Te Koru Pa HR	Local Treasure	3,000
Te Karaka	Local Treasure	3,000
Potaema Picnic Area and Walk	Local Treasure	3,000
York Road Loop Track	Local Treasure	2,803
Mt Damper Falls	Local Treasure	1,734
Patea Loop Track	Local Treasure	1,252
Tataraimaka Pa HR	Local Treasure	1,000
Mangaoraka Loop Track	Local Treasure	789
Puketarata-Parihamore Pa HR	Local Treasure	600
Morgan's Grave Walk	Local Treasure	500
Omata Stockade HR	Local Treasure	500
Mahoetahi HR	Local Treasure	500
Corbett Lake SR	Local Treasure	500
Rahiri Carpark	Local Treasure	500
Rotorangi Hydro Walkway	Local Treasure	500
Mokau Lime Kiln	Local Treasure	500
Puketakauere Pa HR	Local Treasure	400
Taumata HR	Local Treasure	300
Mangapapa Amenity Area	Local Treasure	300
Awa Te Take Pa HR	Local Treasure	200
Tapuinikau Pa Historic Reserve	Local Treasure	200
Whitecliffs Picnic Area	Local Treasure	100
Pou Tehia HR	Local Treasure	100
Misc. signs - New Plymouth Area	Local Treasure	0
Misc. signs - Stratford Area	Local Treasure	0
Kawau Pa HR	Local Treasure	0
Pararoa Pa	Local Treasure	0

Wanganui:

Destination Name	Destination type	Estimated Visitor numbers
Wanganui Journey	Icon	10,000

Destination Name	Destination type	Estimated Visitor numbers
"Mountain to the Sea" Cycle Trail	Gateway	2800

Destination Name	Destination type	Estimated Visitor numbers
Matemateaonga Track - Kohi to Omaru	Backcountry	1,200
Matemateaonga tk - Omaru to Wanganui R	Backcountry	880
Maraekowhai Tk to Ohura River waterfalls	Backcountry	730
Trains tk	Backcountry	522
Maraekowhai Historic Reserve (Nui Poles)	Backcountry	500
Trains tk	Backcountry	350
Trains tk	Backcountry	350
Trains to Tahupo route	Backcountry	298
Trains to Tahupo route	Backcountry	200
Puteore hut to Puniwhakau roadend route	Backcountry	200
Atene Skyline Track	Backcountry	200
Downes Hut	Backcountry	169
Puniwhakau to Matemateaonga Link Track	Backcountry	150
Puteore hut to Humphries clearing route	Backcountry	100
Tahupo to Puteore hut route	Backcountry	100
Pokeka - Otaraheke route - via Maungarau	Backcountry	50
Mangapapapa Kainga	Backcountry	0

Destination Name	Destination type	Estimated Visitor numbers
Raukawa Falls Viewing Platform	Local Treasure	20,000
Gordon Park Scenic Reserve	Local Treasure	5,994
Pipiriki Toilet/Shelter (RDC building)	Local Treasure	4,000
Wanganui River Road Information Kiosk	Local Treasure	3,000
Waitaha Pa	Local Treasure	1,500
Atene Viewpoint Walk	Local Treasure	1,300
Te Maire Loop Track	Local Treasure	1,100
Tunnel Culvert Walk, Wanganui River Rd	Local Treasure	1,000
Aukopae Tunnel Track	Local Treasure	200
Misc. signs - Wanganui Area	Local Treasure	0

Appendix 3

DOMESTIC TOURISM IS BIG

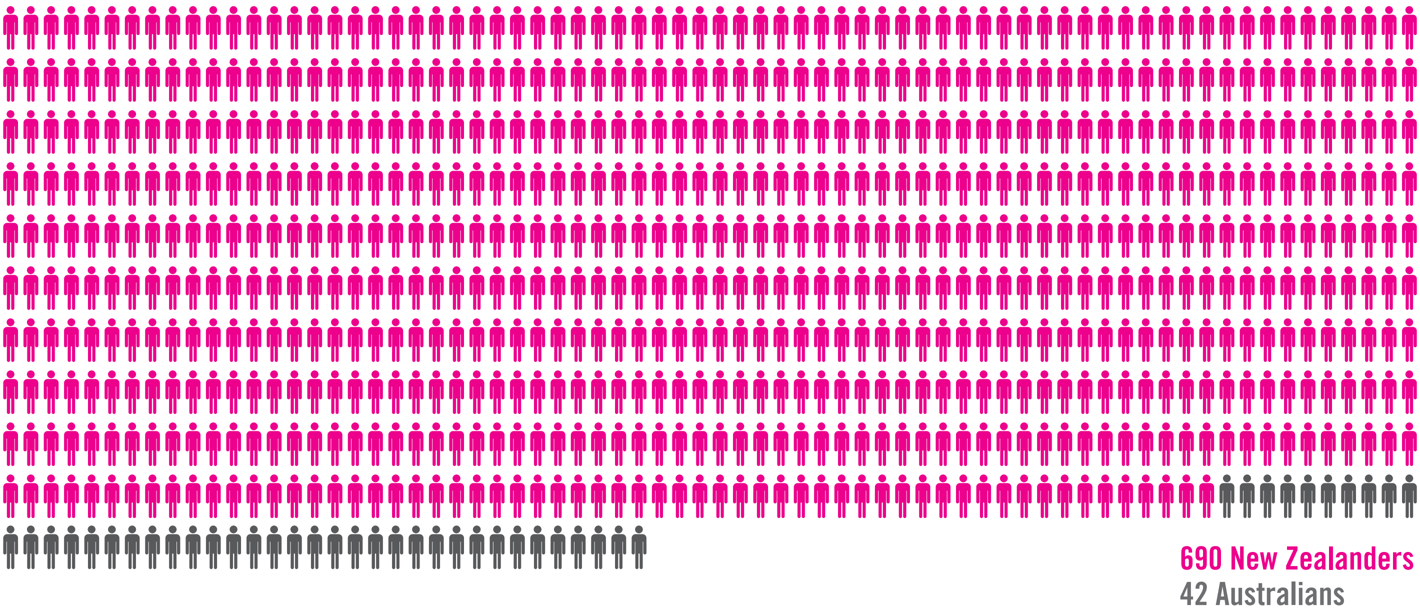
MINISTRY OF TOURISM
TE MANATŪ TĀPOI

Domestic tourism is worth more per year to the economy than **international tourism.**

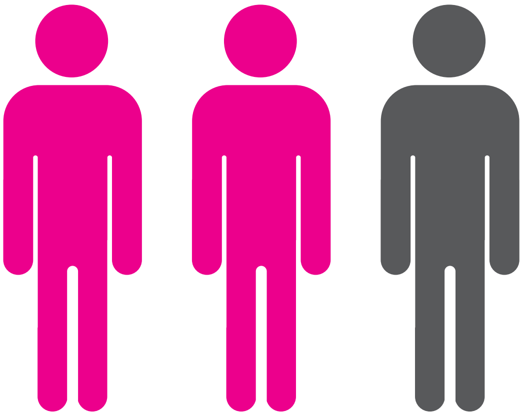
$12.4 billion

$9.3 billion

On average, 690 New Zealanders start a **domestic holiday** every half hour. 42 **Australian visitors** start a New Zealand holiday every half hour.



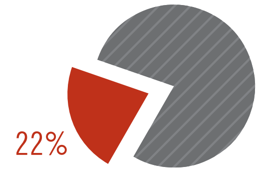
Two thirds of New Zealanders **want to travel more** in New Zealand.



New Zealanders are all different, so a **targeted marketing and product development** approach will achieve more than a "shot gun" approach.

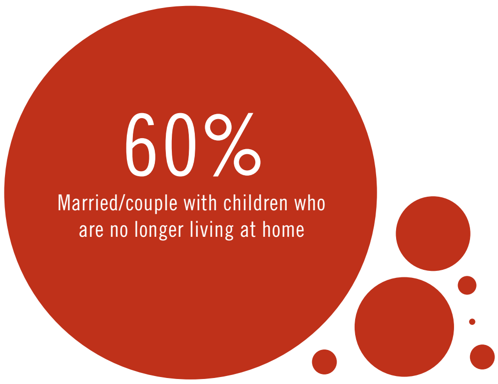
The research shows that New Zealanders can be grouped into **8 market segments**. This helps us to understand the domestic tourism market better and to target our marketing.

BEING THERE

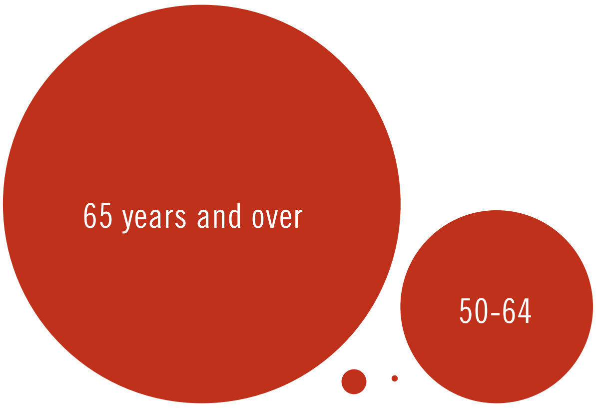


Who is in the Being There Segment?

Life cycle



Age



Members of the Being There Segment more likely than other segments to be **retired**

On holiday they are more likely to travel by **private car** or **campervan/motorhome** and to stay in **private homes** or **motels**

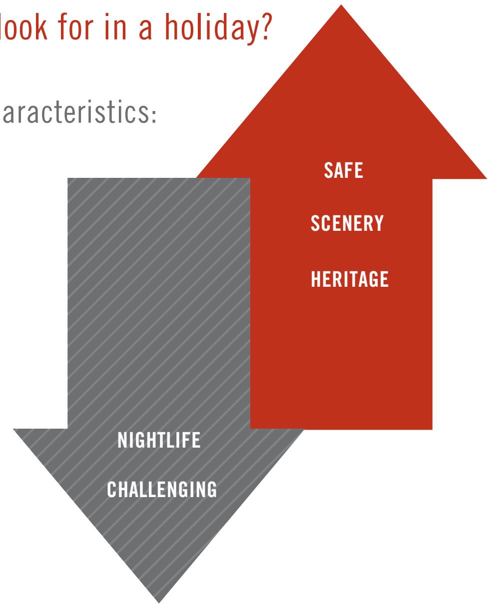
Interests & life priorities

GARDENING
HEALTH
TIME WITH FAMILY/FRIENDS
PAYING BILLS
READING
TRAVEL/HOLIDAYS
SOCIAL/COMMUNITY GROUPS **HOME HOBBIES**

What do they look for in a holiday?

Ideal holiday characteristics:

- IDEAL
- NOT IDEAL



Key marketing proposition:

"Being with family and friends"

Market to this segment through:

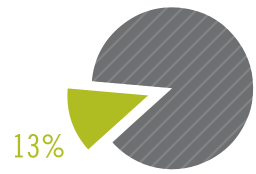
- Major daily newspapers
- Special interest media (e.g. gardening TV channels or publications)
- Affinity groups (e.g churches, Rotary, Probus, other voluntary groups)
- Targeted online channels (e.g news sites, Skype, online auction sites)
- Email marketing

For more information please go to www.tourismresearch.govt.nz/domseg

Travel products likely to appeal to this segment include:

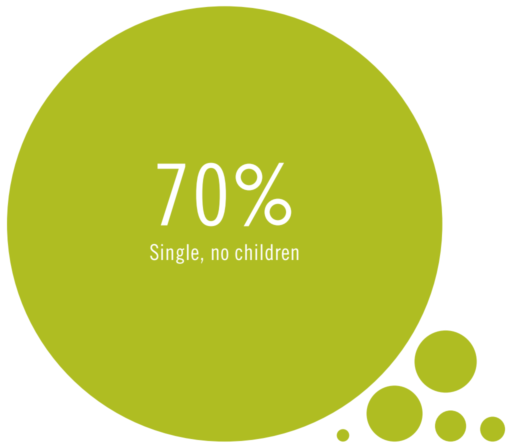
- Day trip/short break (activity and event related)
- VFR campaigns
- Garden/nature products/events
- History/heritage
- Concert/theatre & performing arts
- Small group tours (special interest)
- Assisted travel (transport, accommodation)
- Cruise product

SEARCHING

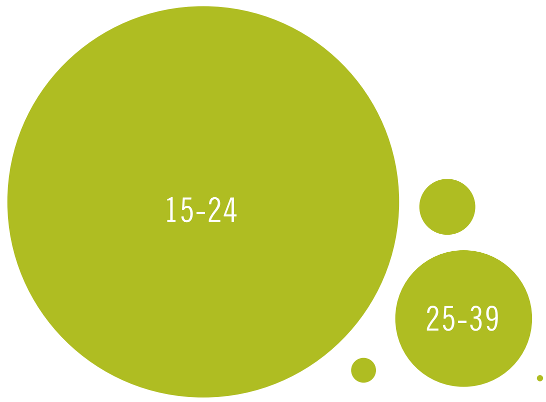


Who is in the Searching Segment?

Life cycle



Age



Searchers are more likely to be **young** and to **live with their parents or friends**

On holiday they are more likely to stay in **hotels** and to **travel by bus or by air**

Interests & life priorities

COMPUTER GAMES
TEXTING
HAVING A GOOD TIME
FINDING LIFE DIRECTION
EDUCATION CINEMA
MUSIC CLUBBING/PARTIES
UPDATING WEBSITES AND DOWNLOADING
TRAVEL/HOLIDAYS

What do they look for in a holiday?

Ideal holiday characteristics:

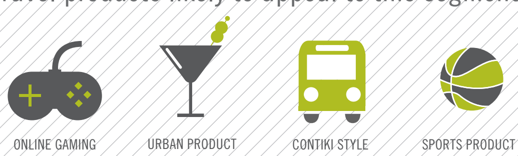
Key marketing proposition:

"Freedom and good times with friends"

Market to this segment through:

- Online, especially social media web-pages
- Youth media (magazines, blogs)
- Educational interest groups/institutions
- Marketing at events/parties
- Mobile applications
- Cinema

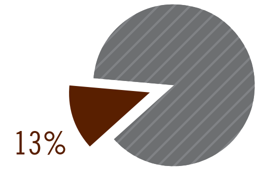
Travel products likely to appeal to this segment include:



- Youth related events (online gaming and sports competitions, sports exhibitions)
- Urban activities (nightlife)
- Contiki-style domestic product (including travel with experiences and opportunities to meet new people)
- Adventure and/or sports products

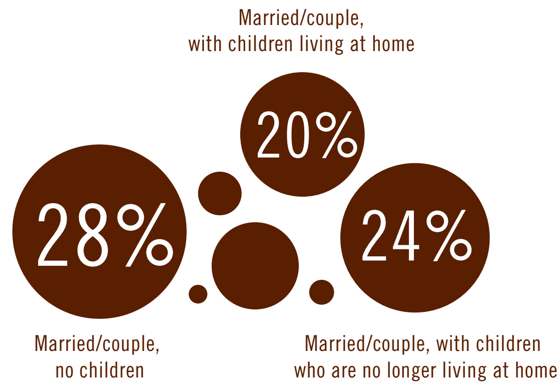
For more information please go to www.tourismresearch.govt.nz/domseg

REWARDING

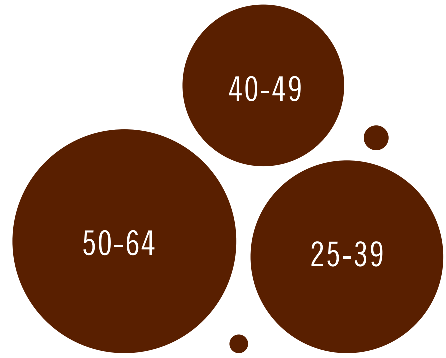


Who is in the Rewarding Segment?

Life cycle



Age



Rewarders are more likely to be **males** in **management or professional positions**, living in **Auckland**

On holiday they are more likely to stay in **hotels, motels,** or **serviced apartments** and to travel by **plane** or **company car**

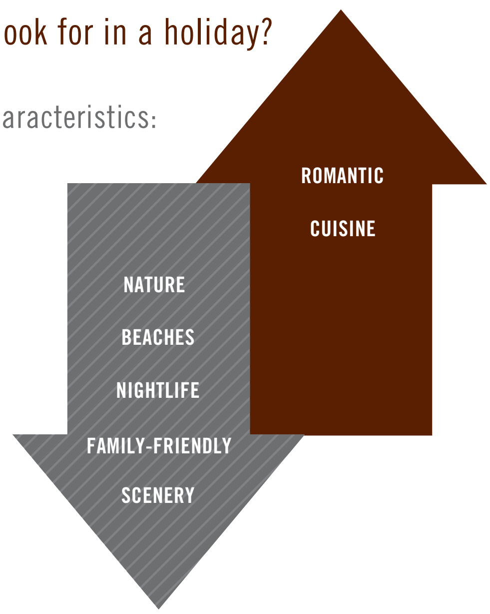
Interests & life priorities

TELEVISION
RELATIONSHIP
REDUCING DEBT
SURFING ONLINE
TRAVEL/HOLIDAYS
BUILDING CAREER/BUSINESS
WATCHING SPORTS
BUILDING ASSETS
GOLF

What do they look for in a holiday?

Ideal holiday characteristics:

- IDEAL
- NOT IDEAL



Key marketing proposition:

"You work hard, you deserve it"

Market to this segment through:

- Business media
- Special interest groups/media/online (e.g. golf clubs or magazines)
- Auckland specific media
- TV Sports/ News Channels
- Live sports events

For more information please go to www.tourismresearch.govt.nz/domseg

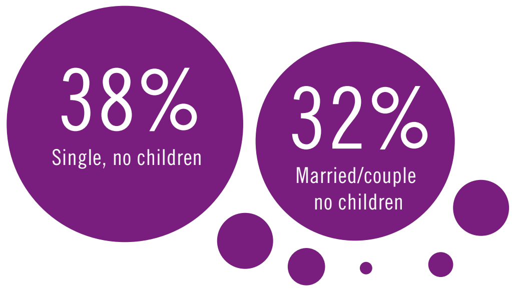
Travel products likely to appeal to this segment include:

- Golf products
- Short breaks
- Food and wine experiences (events, vineyard tours)
- Romantic weekends/short breaks
- Fashion events/shows
- Sports events/shows (e.g motoring, golf)
- Indulgence/pampering (accommodation, wellness experiences)
- Cruise product

IMMERSING

Who is in the Immersing Segment?

Life cycle



Age

Members of the Immersing Segment are likely to be **female** and **living in the city** and very likely to be tertiary educated

On holiday they are more likely to stay in **private dwellings** and **backpackers** and travel by **private car**

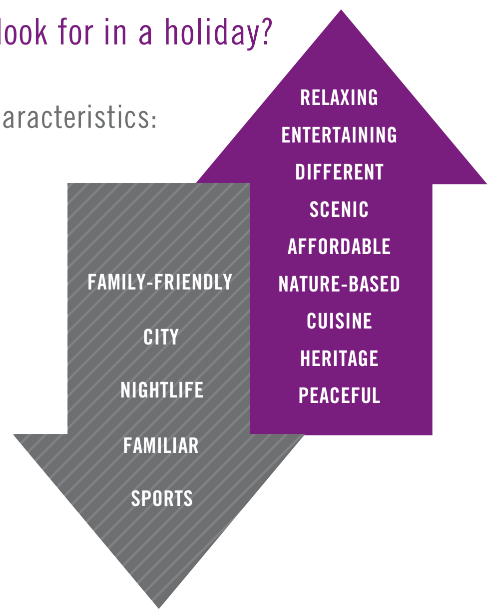
Interests & life priorities

FINANCIAL OBLIGATIONS
FINDING DIRECTION IN LIFE
PETS
EDUCATION
BUILDING CAREER
TRAVEL/HOLIDAYS
PARKS AND GARDENS
THEATRE
MUSICAL INSTRUMENTS HIKING
PAINTING

What do they look for in a holiday?

Ideal holiday characteristics:

- IDEAL
- NOT IDEAL



Key marketing proposition:

"Expand your mind, add to your experiences, enrich your life"

Market to this segment through:

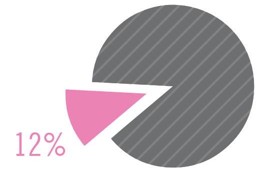
- Special interest and lifestyle media (e.g health media, yoga/wellness media)
- Online channels (travel/lifestyle sites)
- Professional media/interest groups
- Tertiary education institutes

Travel products likely to appeal to this segment include:

- Nature, health, wellness, cultural, artistic, musical, heritage, wildlife, food and wine product, all with an interactive and educational focus
- Workshops
- Hiking groups/routes (including catered)

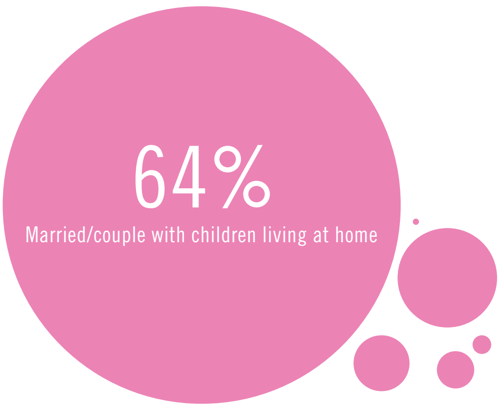
For more information please go to www.tourismresearch.govt.nz/domseg

MAKING DO

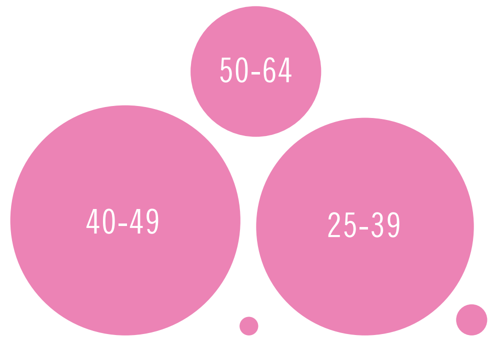


Who is in the Making Do Segment?

Life cycle



Age



Members of the Making Do Segment are more likely than other segments to be **female**, earning a **low income** and have **children living at home**

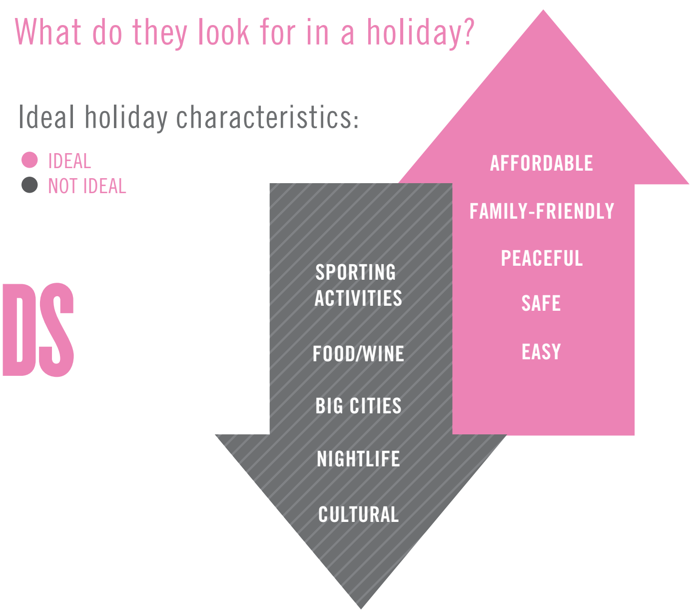
On holiday they are more likely to travel by **car/van** and to stay in **rented accommodation**

Interests & life priorities

RAISING FAMILY
PAYING THE BILLS
TIME WITH FAMILY/FRIENDS
HEALTH REDUCING DEBT
VISITING MARKETS
SECOND HAND SALES
TRAVEL/HOLIDAYS

What do they look for in a holiday?

Ideal holiday characteristics:



Key marketing proposition:

"You deserve a break"

Market to this segment through:

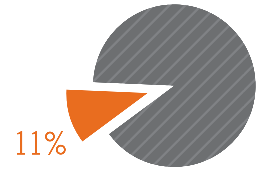
- Women's magazines
- Lifestyle media
- Daytime TV and radio
- Advertising at fairs and markets

Travel products likely to appeal to this segment include:

- Family-friendly products
- Nature-based experiences
- Accommodation and activities offering childcare facilities (e.g. kids'clubs)
- Affordable and easy products

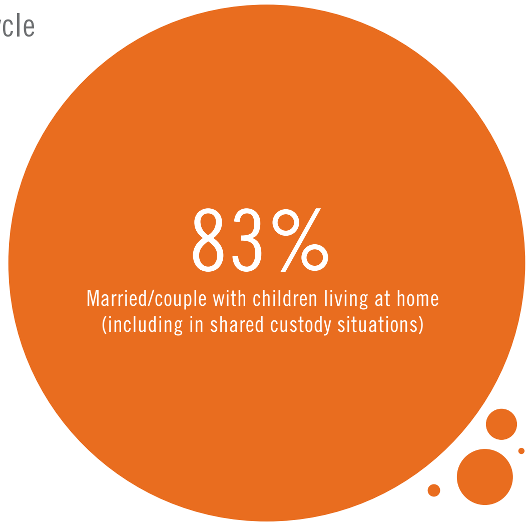
For more information please go to www.tourismresearch.govt.nz/domseg

EMBRACING LIFE

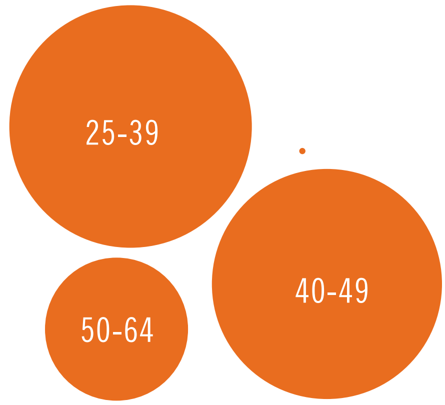


Who is in the Embracing Life Segment?

Life cycle



Age



Members of the Embracing Life Segment are likely to be **family-focussed** and earning a **high income**

On holiday they are more likely to stay in **motels** and **rented accomodation**, and to travel by **private car** and (sometimes) **bicycle**

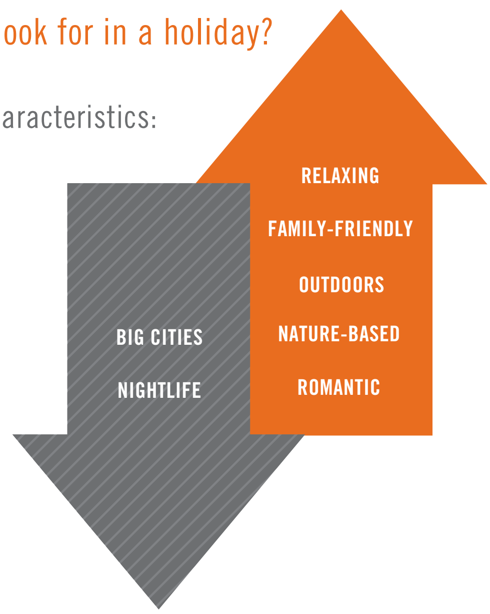
Interests & life priorities

RAISING FAMILY
RELATIONSHIPS
FRIENDS/FAMILY
ENTERTAINING AT HOME
REDUCING DEBT/BUILDING ASSETS
CAREER/BUSINESS TRAVEL/HOLIDAYS
HOME MAINTENANCE BOATING/FISHING HIKING/OUTDOORS

What do they look for in a holiday?

Ideal holiday characteristics:

- IDEAL
- NOT IDEAL



Key marketing proposition:

"A FULL life for you and your family"

Market to this segment through:

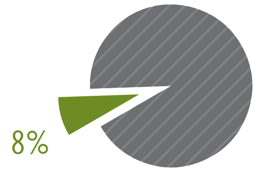
- Business media
- Special interest groups/media/online (e.g. golf/outdoor focussed, boating, fishing)
- Major daily newspapers
- Outdoor events and shows (e.g. boat/fishing shows)

Travel products likely to appeal to this segment include:

- Outdoor adventures/experiences for the whole family (e.g. cycling, fishing, canoeing, kayaking, adventure sports, boating, fishing, beaches)
- Cultural product
- Food/wine product
- Heritage events/experiences

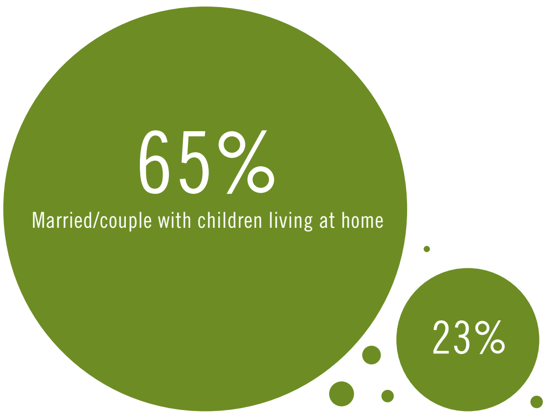
For more information please go to www.tourismresearch.govt.nz/domseg

CREATING

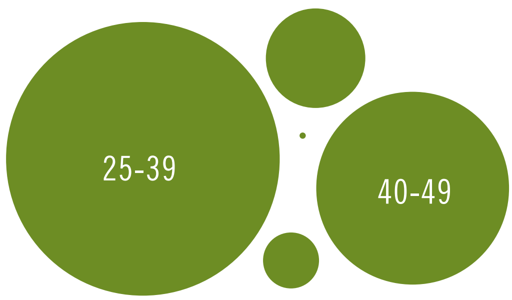


Who is in the Creating Segment?

Life cycle



Age



Members of the Creating Segment are more likely to be from a **range of ethnic groups** and to have a **tertiary (often trade) qualification**

On holidays they are more likely to travel in a **private or company vehicle** and to be **visiting friends and relatives**

Interests & life priorities

RAISING FAMILY
HEALTH
FINANCIAL OBLIGATIONS
BUILDING CAREER & ASSETS
COMMUNITY GROUPS
VISITING MARKETS
TRAVEL/HOLIDAYS
CHURCH/VOLUNTARY GROUPS

What do they look for in a holiday?

Ideal holiday characteristics:

Key marketing proposition:

"Good times to share with your family"

Market to this segment through:

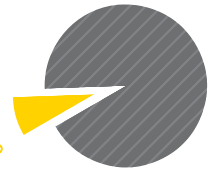
- Special interest groups/ media (e.g cultural groups, cultural media)
- Online channels
- Targeted lifestyle media
- Cultural and community events

For more information please go to www.tourismresearch.govt.nz/domseg

Travel products likely to appeal to this segment include:

- Social/shared experiences
- Events/ concerts/festivals
- Beaches/ nature product
- Camping
- Picnics/outdoor cooking
- Group accommodation
- History and heritage
- Cultural product

AIMING HIGH



Who is in the Aiming High Segment?

Life cycle

Age

Aiming High are more likely to be **students** or **young professionals** from **affluent backgrounds,** often **living with their parents** or **friends**

On holiday they are more likely to **travel with their parents** and stay in **commercial accommodation**

Interests & life priorities

HAVING A GOOD TIME
CLUBBING/PARTIES
FINDING DIRECTION IN LIFE
SPORTS/HOBBIES FITNESS
EDUCATION
TRAVEL/HOLIDAYS CAREER
MEETING PEOPLE

What do they look for in a holiday?

Ideal holiday characteristics:

Key marketing proposition:

"More, bigger, best!"

Market to this segment through:

- Youth media (magazines, blogs)
- Special interest media (e.g skiing/snow boarding)
- Online channels
- Interest groups (sports clubs, other affinity groups)
- Cinema

Travel products likely to appeal to this segment include:

- Adventure and sports product (the BEST skiing, the BEST beaches, the BEST mountain biking tracks)
- Youth/sporting/adventure events
- Urban product (nightlife, bars, cafes/music events)
- Wellness experiences

For more information please go to www.tourismresearch.govt.nz/domseg

Ministry of Tourism April 2010
An electronic version of this publication as well as the full Domestic Tourism Market Segmentation report is available at **www.tourismresearch.govt.nz/domseg**.

Data Sources:
Monetary comparison: Tourism Satellite Account 2009 (TSA - Statistics New Zealand)
Departing New Zealanders: Domestic Travel Survey (DTS - Ministry of Tourism)
Australian arrivals: International Visitor Arrivals (IVA - Statistics New Zealand)

ISBN: 978-0-478-28652-6

The Ministry of Tourism
PO Box 5640
Wellington
Telephone: (04) 498 7440
Fax: (04) 498 7445
Email: info@tourism.govt.nz

MINISTRY OF TOURISM
TE MANATŪ TĀPOI

Appendix 4

Key Literature & Data Sets

- The Department of Conservation. *Taupō Fisheries Survey 2012*. APR Consultants.
- The Department of Conservation. *Destination Management Framework 2011*.
- The Department of Conservation. *Statement of Intent 2012-2017*.
- The Department of Conservation. *National Survey of New Zealanders 2012*.
- The Department of Conservation. *Visitor Trends Report TWT Conservancy 2013*.
- The Department of Conservation. *TWT DOC Website Statistics*.
- Project Tongariro Pocket Ranger Statistics as at 31 March 2013.
- The Department of Conservation. *Taupō Fisheries Economic Analysis 2012.* APR Consultants.
- Local visitor guide maps and attraction listings.
- Ministry of Business, Innovation and Employment. *International Visitor Survey Data*.
- Ministry of Business, Innovation and Employment. *Domestic Travel Survey Data*.
- Ministry of Business, Innovation and Employment. *Commercial Accommodation Monitor Data.*
- Ministry of Business, Innovation and Employment. *Regional Visitor Monitor Data*.
- Ministry of Business, Innovation and Employment. *Domestic Tourism Market Segmentation Data*.
- Ministry of Business, Innovation and Employment. *Regional Tourism Indicators.*
- Ministry of Business, Innovation and Employment. *Tourism Forecasts 2012-2018*.
- Ministry of Business, Innovation and Employment. *Tourism Sector Profile – Nature Based Tourism 2009*.
- Ministry for Culture and Heritage, *Demand for Cultural Tourism*. Angus & Associates 2008
- Tourism New Zealand. *Visitor Experience Monitor Data*.
- Statistics New Zealand. *International Visitor Arrivals Data*.
- Statistics New Zealand. *Tourism Satellite Account 2012.*
- Dwyer L., *Megatrends underpinning tourism to 2020: Analysis of key drivers for change*. STCRC 2008
- Balmford A, Beresford J, Green J, Naidoo R, Walpole M, et al. (2009) *A Global Perspective on Trends in Nature-Based Tourism*. PLoS Biol 7(6): e1000144. doi:10.1371/journal.pbio.1000144
- Living Reviews. *Outdoor Recreation and Nature Tourism: A European Perspective.* Living Rev. Landscape Res., 1, (2007).
- Sport New Zealand, *Outdoor Recreation Strategy 2009–2015*, 2009
- Rough Guides, roughguides.com
- Trip Advisor, tripadvisor.com
- Lonely Planet, lonelyplanet.com
- Tourism Industry Association New Zealand, *Submission To Inform The Outdoor Recreation Review*, 2007

- Lovelock, B., Jellum, C. and Thompson, A. *Understanding Commitment and Involvement in Outdoor Recreation in New Zealand*, University of Otago, 2011
- Higham, J.E.S.; Carr, A.M. and Gale, S. (2001). *Ecotourism in New Zealand: Profiling visitors to New*
- *Zealand Ecotourism Operations.* Research Paper Number Ten.
- Dunedin. New Zealand. Department of Tourism, University of Otago.
- Booth, K.L. and Lynch, P.M. (2010). *Outdoor Recreation Research Stocktake: Synthesis.* Prepared for Sport and Recreation New Zealand by Lindis Consulting, Christchurch
- Kearsley G, Russell S, Mitchell R. The Contribution of Frontcountry Tourist Recreation Towards Increased Crowding And Dissatisfaction In New Zealand's Natural Environments. Department of Tourism, University of Otago.
- Intercontinental Hotels Group. *The new kinship economy: From travel experiences to travel relationships* 2013.
- Yeoman I. (2012). *Tourism 2050: Scenarios for New Zealand*. Victoria University or Wellington.
- Nordin S., *Tourism of Tomorrow – Travel Trends and Forces of Change*. ETOUR 2005
- Richards G., *Tourism Trends: Tourism, culture and cultural routes*. 2011