

Visitor Trends Report



Tongariro
Conservancy

Whanganui

Taranaki

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Introduction

This report outlines the key trends affecting recreation and tourism both nationally and in Tongariro Whanganui Taranaki Conservancy. It has been written for Department of Conservation staff, contractors and local stakeholders and is intended to provide supplementary information to support the Regional Tourism Trends and Opportunities report being prepared by Angus & Associates.

Five broad topics with short and long term effects on recreation and tourism are discussed in the report. These are

- International tourism,
- Domestic tourism
- Visitation to public conservation land in the Tongariro Whanganui Taranaki region
- New Zealanders' participation in outdoor recreation
- Demographic change at national and local level.

Each chapter covers the major sources of available information drawing on both publically available data, such as national tourism datasets, and information held by the Department. Information has been summarised at the beginning of each chapter.

International tourism trends

This section outlines the major sources of information regarding the number and origin of international visitors to New Zealand. Other aspects including visitors' spending, length of stay and levels of demand for park and nature based activities are also discussed.

The available information suggests that international tourism is changing and will continue to do so. The number of overseas tourists visiting New Zealand is growing but visitors are spending less and taking shorter trips. The mix of visitors is also changing with increasing numbers of visitors from China and Australia and a sharp decline in some of New Zealand's traditional markets including the UK, USA, Japan and South Korea. This trend is forecast to continue over the next 5 years.

While park and nature based experiences remain popular the changing mix of international visitors presents challenges for DOC. If the current trends continue there may be static or declining numbers of international visitors for many areas of public conservation land, particularly those that are distant from Auckland (and other main entry ports), or from major attractions and travel routes. The various data sources are discussed in more detail below.

Visitor Arrivals

Growth in international visitor arrivals (Statistics New Zealand 2009, Ministry of Business, Innovation & Employment 2013c) has slowed after a long period of rapid growth that finished in 2004. There were 2,564,618 international visitor arrivals in 2012 which was 21.8% higher than in 2003 but down slightly (-1.4%) on 2011 (Figure 1).

While the number of international visitor arrivals has increased the mix of visitors has changed significantly (Figure 2). The key trends are;

- The number of arrivals from Australia, New Zealand's largest market, continues to grow. Australian visitor arrivals increased by 27.9% between 2006 and 2012.
- The Chinese market has grown by 86.4% over the same period to become New Zealand's second largest source of overseas visitors in 2012. In 2006 China was New Zealand's 6th largest market.
- Visitor arrivals from four of New Zealand's traditional markets have declined sharply. These are;
 - United Kingdom -35.7%
 - USA -21.3%
 - Japan -47.2%
 - South Korea -52.5%
- Arrivals from Germany have increased 7.5% since 2006.

Figure 1: International visitor arrivals 2003 - 2012 (Source: Statistics New Zealand)

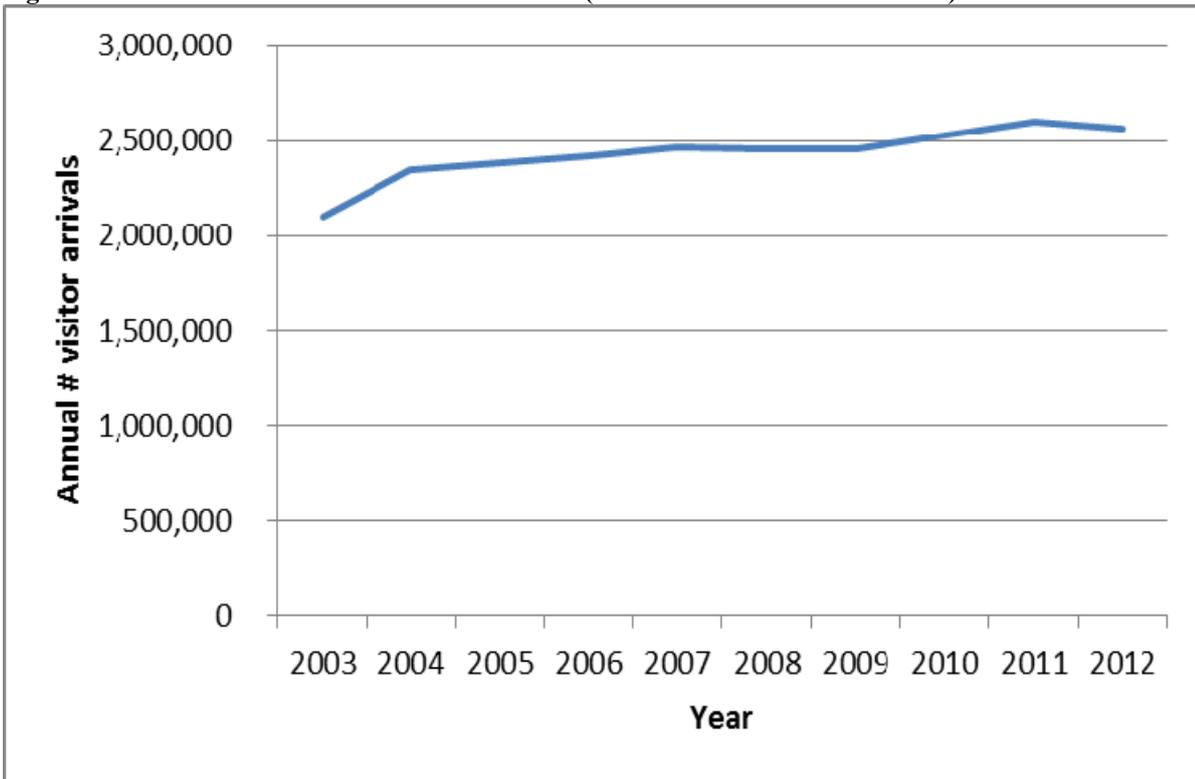
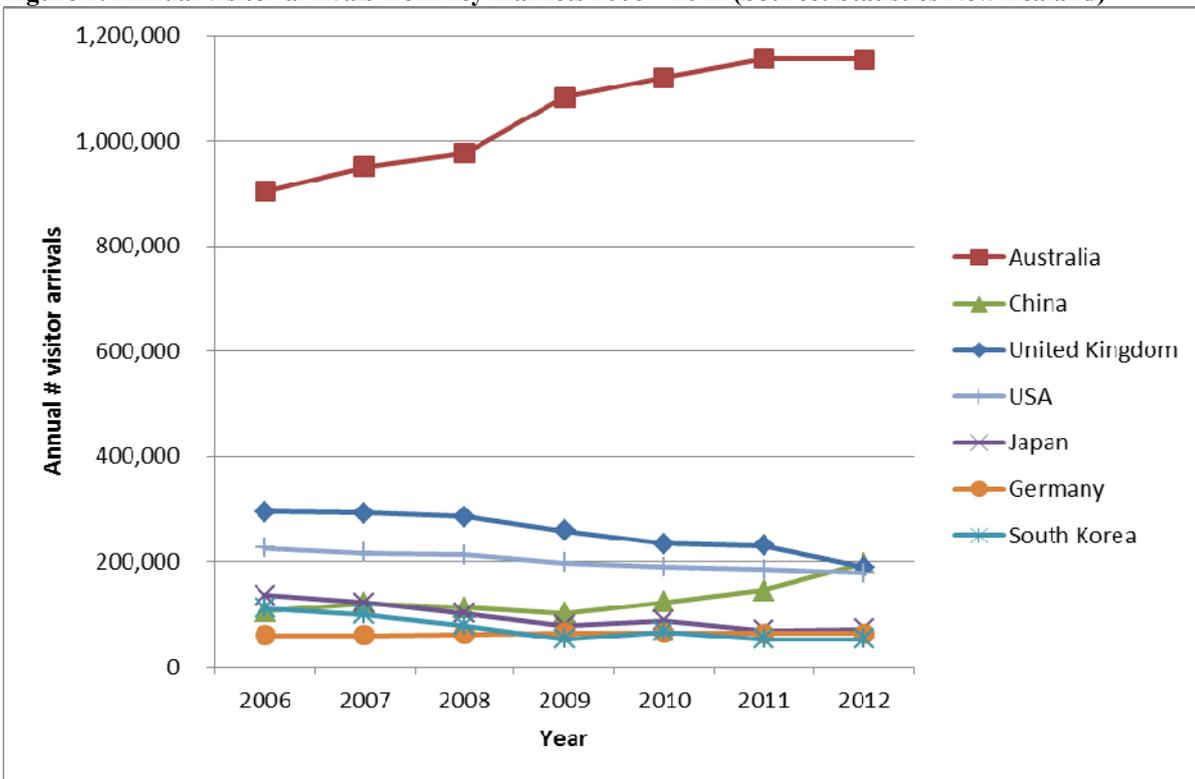


Figure 2: Annual visitor arrivals from key markets 2006 – 2012 (Source: Statistics New Zealand)



Length of stay

The mean length of stay for overseas visitors to New Zealand in 2012 was 19.1 days. The mean figures are skewed by long stay visitors (e.g. those on working holidays) however, and the median length of stay is a more useful indicator. In 2012 the median length of stay for international visitors was only 9 days (Ministry of Business, Innovation & Employment 2013d). Both the median and mean length of stay in 2012 were 1 day lower than in 2010 (Ministry of Economic Development 2011).

Length of stay for different overseas markets varies widely (Table 1). For example the median length of stay for Chinese visitors is only four days, while for the United Kingdom it is 20 days (Ministry of Business, Innovation & Employment 2013d). These differences and the changing mix of visitors are likely to be behind the reduction in average length of stay. This could be caused, for example, by there being fewer long stay visitors from the UK, more short stay visitors from China along with a tendency for Australian visitors to take shorter trips.

A decrease in length of stay means that visitors will tend not to travel as far from Auckland, the main port of entry, and will be less likely to visit areas away from main attractions and tourist routes.

Table 1: 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

Visitor spending

In the year to February 2013, spending by international visitors (Figure 3) was 14% below 2008 levels (Ministry of Business, Innovation & Employment 2013f). In 2012 the average spend by international visitors (Table 2) during their trip (excluding international airfares) was \$2300 and the median spend was \$1400 (Ministry of Business, Innovation & Employment 2013d).

Figure 3: International tourism spending 2008 – 2013 (Source: Regional Tourism Indicators)



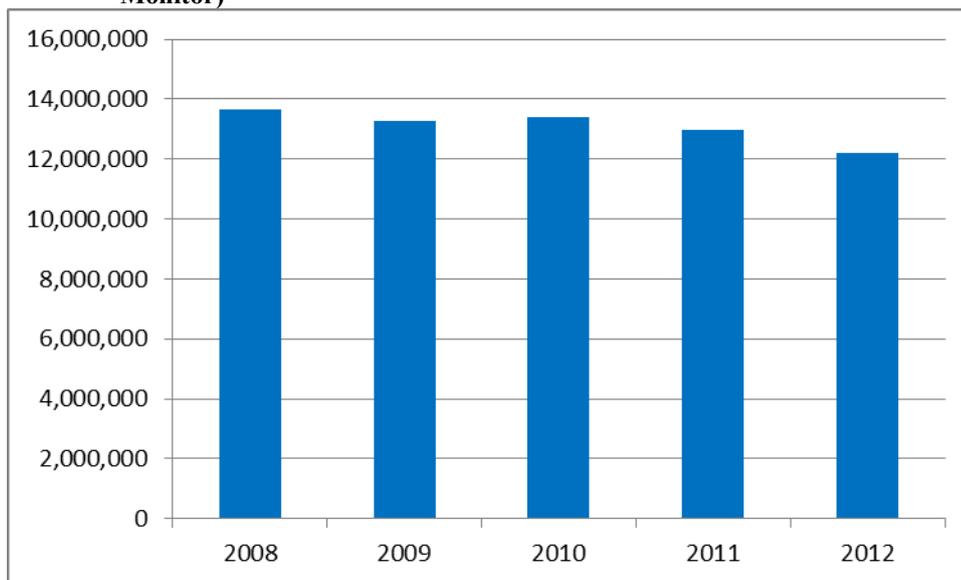
Table 2: Spending in New Zealand for key markets (Source: International Visitor Survey)

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

The Commercial Accommodation Monitor (Figure 4) provides another indicator of overall tourism activity. Despite the increase in the number of visitor arrivals, commercial guest nights from international visitors declined by 10.8% between 2008 and 2012 (Statistics New Zealand 2013). This again reflects the shorter stays and changing tourism market.

Figure 4: International commercial guest nights 2008 - 2012 (Source: Commercial Accommodation Monitor)



International tourism forecasts

The changes to tourism markets outlined above are forecast to continue in the short to medium term according to forecasts released in November 2012 (Ministry of Business, Innovation & Employment 2012). Total visitor numbers are expected to increase by 28% between 2011 and 2018 but the mix of visitors will be different. It is expected that traditional markets such as the United Kingdom and United States will continue to decline but this will be offset by strong growth in the Australian and Chinese markets. Visitor spending is predicted to increase by 9% and return to pre-global financial crisis levels by 2018. The average spend per day is expected to remain steady at \$112 but the average length of stay for overseas visitors is forecast to decline by 15% to 16.9 days. This is due to a shift in the market in favour of short-haul trips from Asia and Australia.

Activities undertaken by international visitors

Trends in the activities undertaken by international visitors during their visit (Figure 5 & 6) are captured in the International Visitor Survey (Ministry of Business, Innovation & Employment 2013a). The key trends are;

- Walking and trekking has remained the third most popular activity for overseas visitors behind shopping and dining. In 2012 more than 1.7 million international visitors walked or trekked during their stay in New Zealand. Participation in this activity by overseas visitors has increased strongly since 2008 but fell in 2012 with the decrease in visitors.
- Demand for a number of more passive experiences offered on public conservation land including other scenic / natural attractions and lookouts and viewing platforms have also increased.
- Land based sightseeing declined sharply between 2006 and 2009. Numbers are growing again but are currently 25.9% below their 2005 peak.

- Interest in volcanic / geothermal attractions is static, while the number of overseas visitors who visited cultural and heritage attractions has declined.
- Interest in cultural attractions has been declining since 2005 while interest in historic attractions has also begun to decline.

Figure 5: Annual number of international visitors undertaking selected active outdoor recreation activities (Source: International Visitor Survey)

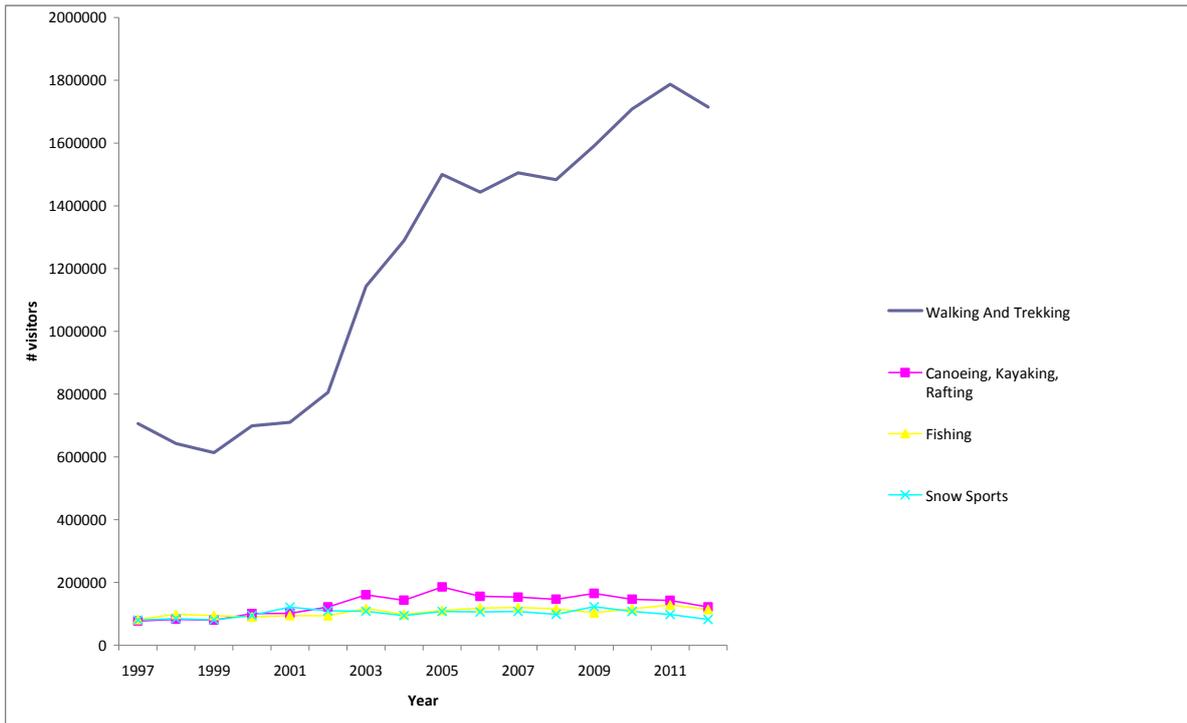
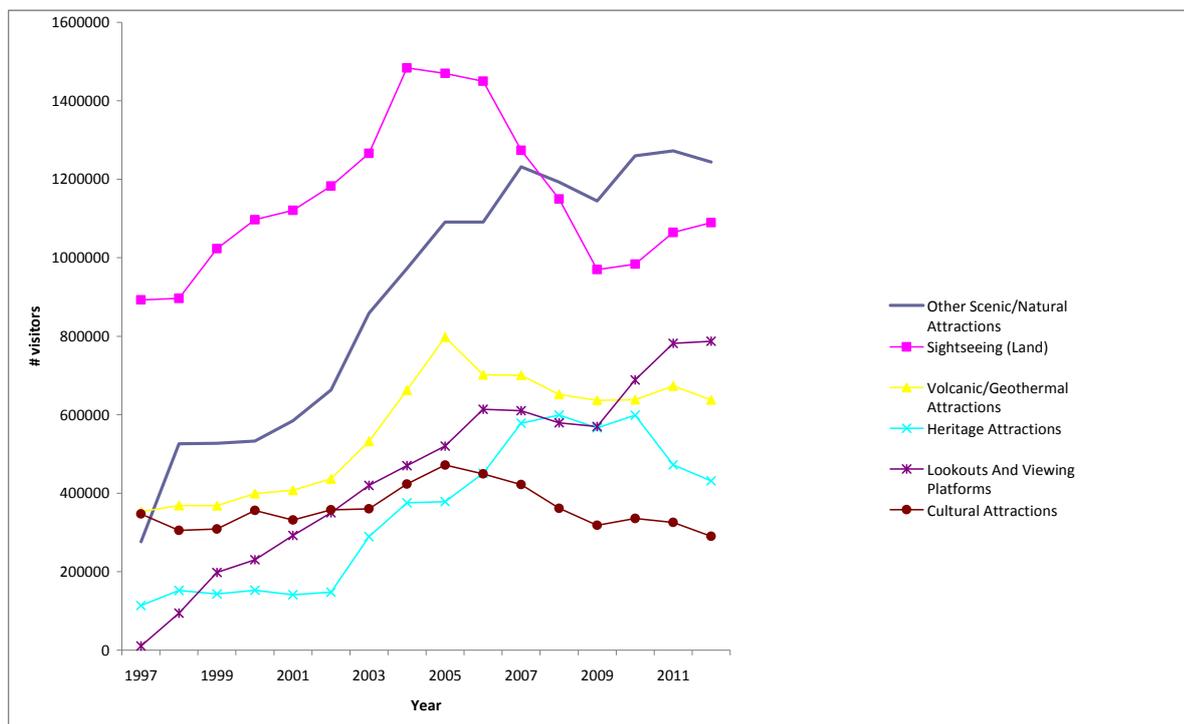


Figure 6: Annual number of overseas visitors undertaking selected passive recreation activities (Source: International Visitor Survey)



Demand for park and nature based activities by overseas market

Tourism New Zealand’s Visitor Experience Monitor (Tourism New Zealand 2012b-h) tracks participation and interest in a wide range of park and non park based activities. Analysis of four activities – tramping / hiking, visits to National Parks, scenic bush walks and scenic drives (Figures 7-10) shows that there are significant implications for DOC in the changing nature of New Zealand’s overseas tourism markets.

The declining UK and USA markets are ones that have high levels of participation in these four activities. While growth is occurring in New Zealand’s two largest tourism markets - Australia and China, these are markets that have lower levels of participation. Over time this will lead to a visitor mix with lower participation levels than is the case currently. Combined with the trend towards shorter stays in New Zealand, this could lead to static or decreasing number of international visitors using public conservation land.

While there are lower levels of participation among Australian and Chinese visitors it does not appear that this is because they necessarily lack interest in the outdoors. Instead there is significant latent demand i.e, interest that is not flowing through into actual participation. There is an opportunity to grow the number of Australian and Chinese visitors using public conservation land if their needs and barriers to participation are understood and if the right opportunities are provided in the right places.

Figure 7: Demand for tramping / hiking by overseas market (Source: Visitor Experience Monitor 2011/12)

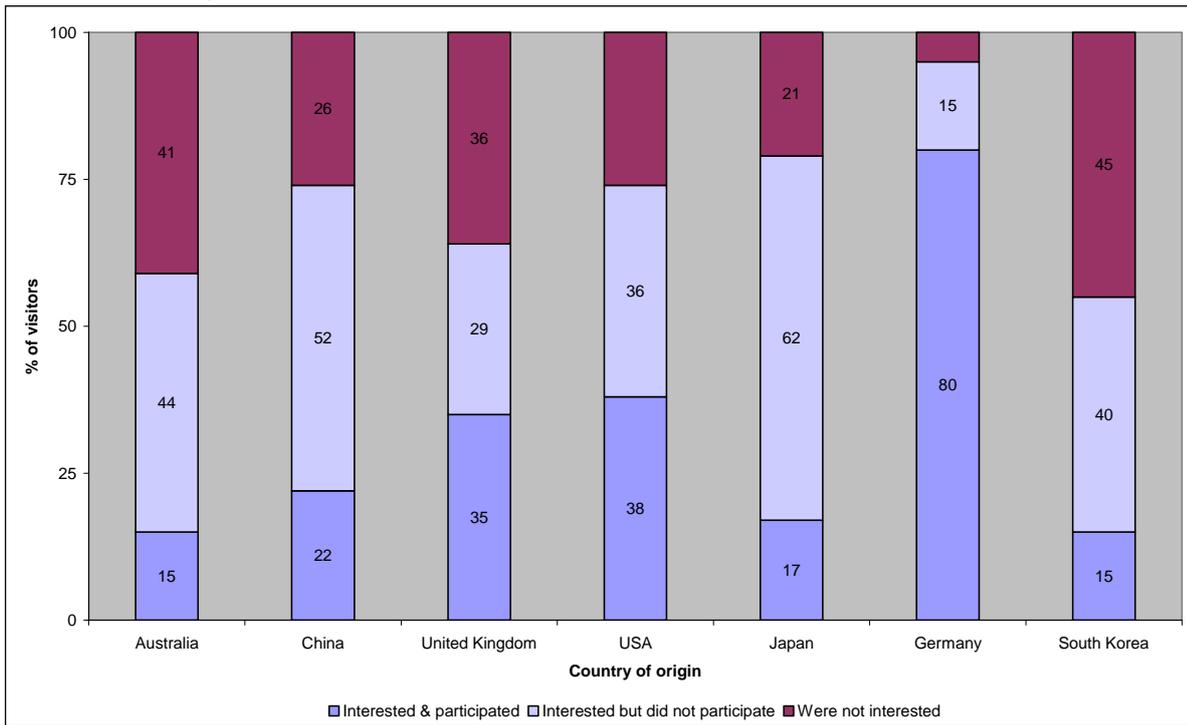


Figure 8: Demand for visits to national parks by overseas market (Source: Visitor Experience Monitor 2011/12)

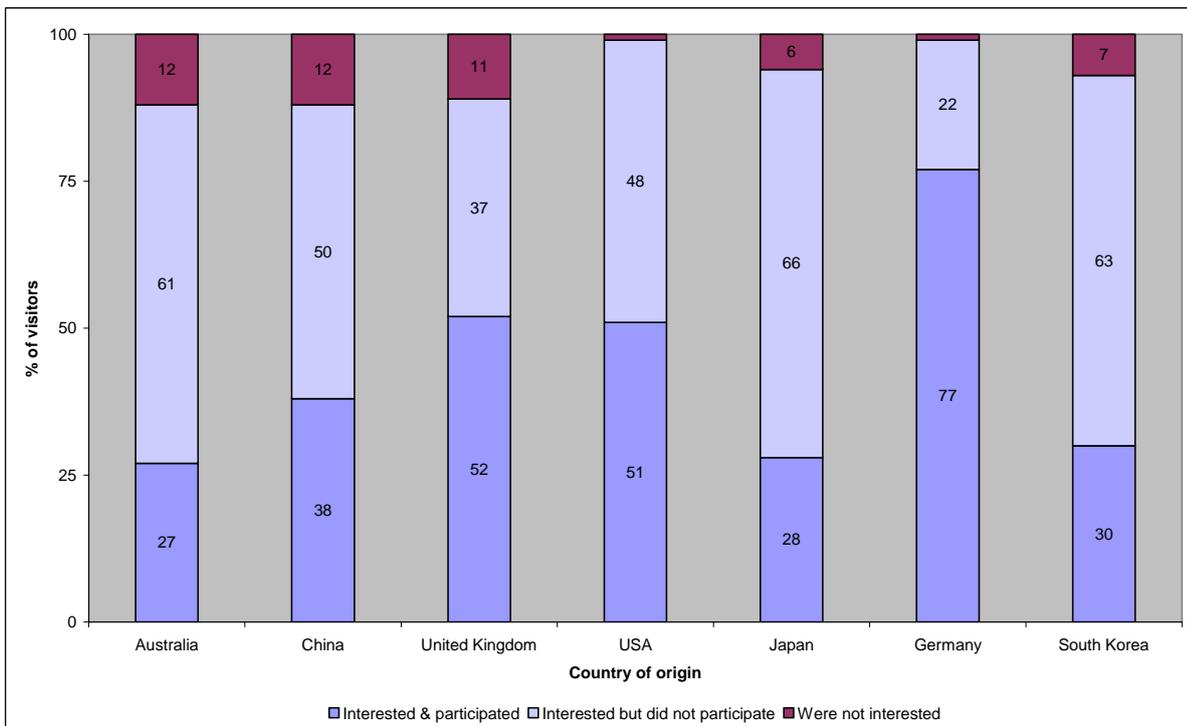


Figure 9: Demand for scenic bush walks by overseas market (Source: Visitor Experience Monitor 2011/12)

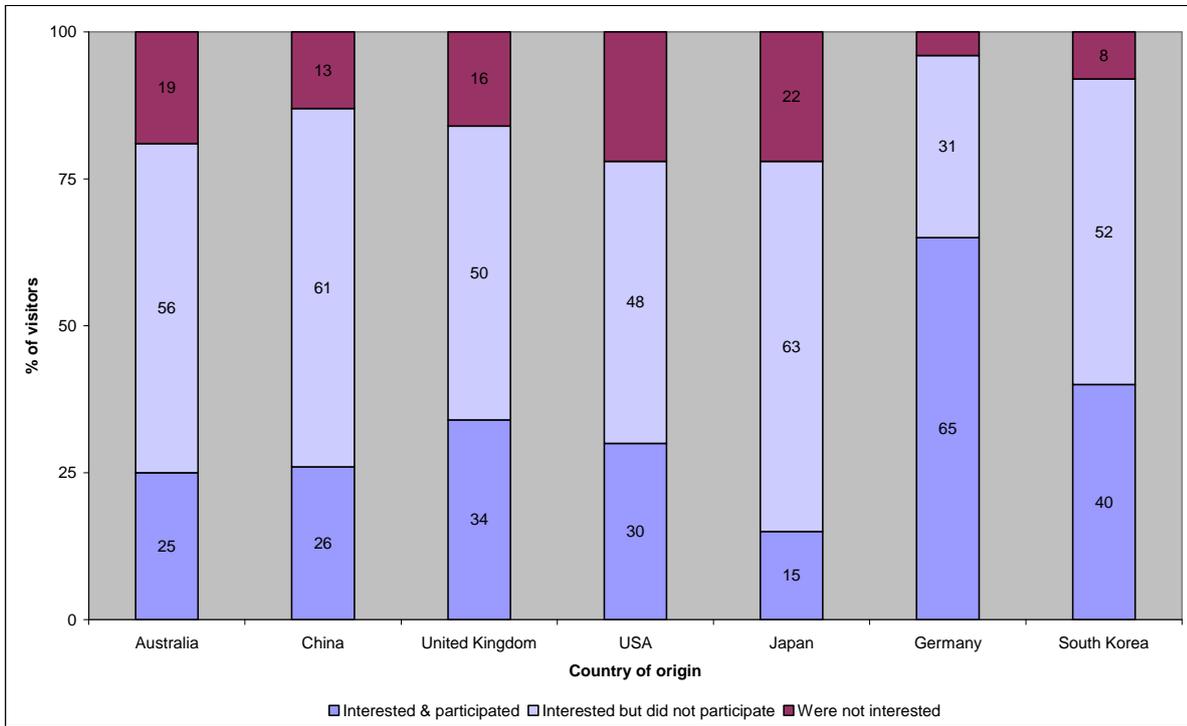
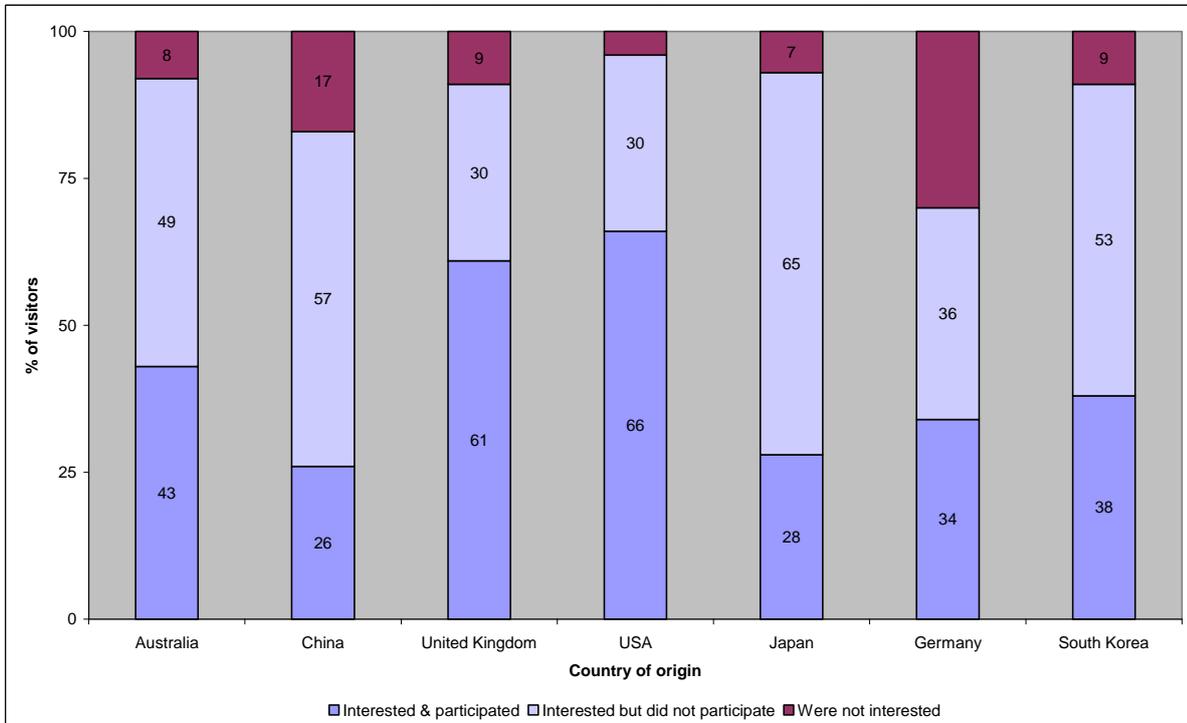


Figure 10: Demand for scenic drives by overseas market (Source: Visitor Experience Monitor 2011/12)



One obvious barrier is length of stay. As indicated above, the median length of stay in New Zealand is only 4 days for Chinese visitors and 7 days for Australians. This compares with 20 days for British visitors and 10 days for those from the USA (Ministry of Business, Innovation & Employment 2013d). 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 successful than some of the traditional opportunities that DOC provides.

Domestic tourism trends

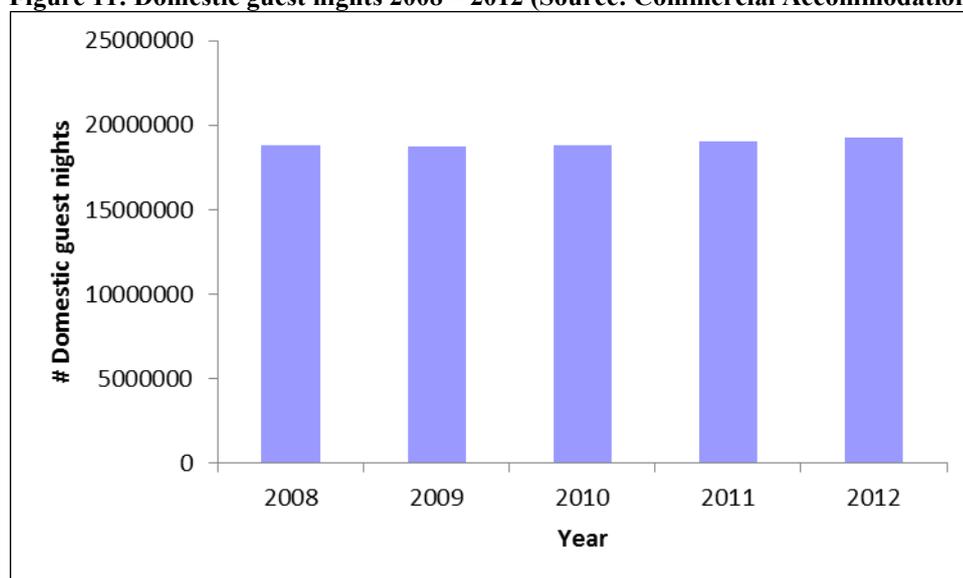
The following section summarises available information on domestic tourism trends. Information is provided on the percentage of New Zealanders taking holidays within the country along with trends in spending and commercial guest nights from domestic visitors. The Domestic Travel Survey is used to show the significance of various outdoor activities to domestic tourism.

The data suggests that commercial guest nights are increasing after a number of years of decline. However, visitor spend is only marginally above 2008 levels and fewer New Zealanders overall are taking holidays within New Zealand. The Domestic Travel Survey shows that walking or trekking, land based sightseeing and other scenic / natural attractions were each included in more than 4.7 million trips in 2011 (Ministry of Business, Innovation & Employment 2013b). Each of these information sources is discussed in more detail below.

Commercial guest nights

The Commercial Accommodation Monitor (Figure 11) shows that the total number of domestic guest nights across New Zealand increased slightly from 18,823,409 in 2008 to 19,251,820 in 2012. This was an increase of 2.3% (Statistics New Zealand 2013).

Figure 11: Domestic guest nights 2008 – 2012 (Source: Commercial Accommodation Monitor)



Spending

According to the Regional Tourism Indicators (RTI), spending by domestic tourists is increasing after reaching a low point in June 2009 (Figure 12). Spending in the year to January 2013 was 10% above 2008 levels (MBIE 2013e).

Figure 12: Domestic tourism spending 2008 – 2013 (Source: Regional Tourism Indicators)



Number of trips

The Domestic Travel Survey (DTS) records the number and characteristics of trips undertaken by New Zealanders. Unlike the International Visitor Survey discussed earlier, long term trend data is not available as the DTS was revised in September 2009 and new data is not comparable with older data. Recent data (Table 3) shows an increase in tourism between 2010 and 2011 (Ministry of Business, Innovation & Employment 2013b).

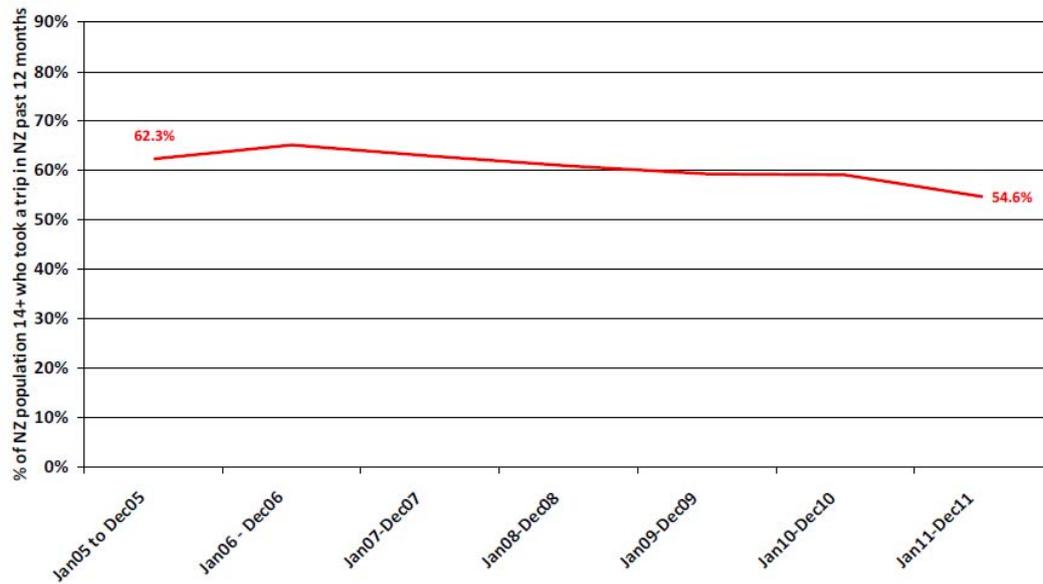
Table 3: Total number of domestic trips 2010 – 2011 (Source: Domestic Travel Survey)

	2010	2011	% change
Total day trips	28,204,988	32,386,682	14.8%
Total overnight trips	15,872,307	17,680,867	11.4%
Total trips	44,077,295	50,067,549	13.6%

Percentage of New Zealanders taking domestic holidays

Information on New Zealanders' domestic tourism behaviour is also available from ongoing surveys carried out by Roy Morgan Research (Figure 13). This information shows that the percentage of New Zealanders taking holidays within New Zealand has been declining since 2006 (Roy Morgan Research 2012).

Figure 13: Percentage of New Zealanders taking holiday trips in New Zealand 2005 - 2011 (Source: Roy Morgan Single Source Database)



Base: NZ pop'n aged 14+, January 2002-December 2011, average sample = 12,000

Activities undertaken by domestic visitors

Information on activities undertaken by New Zealanders' on trips within New Zealand is available from the Domestic Travel Survey (Ministry of Business, Innovation & Employment 2013a). Walking and trekking was the most popular activity undertaken by New Zealanders. This is supported by other information sources such as the Active New Zealand and Roy Morgan Surveys which are discussed later in this report. New Zealanders made more than 4.7 million domestic trips involving walking and trekking in 2012. Swimming, fishing and sightseeing were also popular activities (Tables 4 & 5).

Table 4: Number of trips by New Zealanders involving selected active recreation activities (Source: Domestic Travel Survey)

Activity	2010	2011	% change
Walking and trekking	4,751,928	4,739,845	-0.3
Swimming	1,850,169	1,908,711	+3.2
Fishing	1,726,771	1,536,556	-11.0
Hunting/shooting	350,802	470,597	+34.1
Snow sports	315,473	345,992	+9.7

Table 5: Number of trips by New Zealanders involving selected passive recreation activities (Source: Domestic Travel Survey)

Activity	2010	2011	% change
Sightseeing (land)	5,018,337	4,872,718	-2.9
Other scenic/natural attractions	4,383,647	4,511,105	+2.9
Volcanic/geothermal attractions	819,931	964,406	+17.6
Lookouts and viewing platforms	101,748	148,734	+46.2
Heritage attractions	189,086	146,384	-22.6

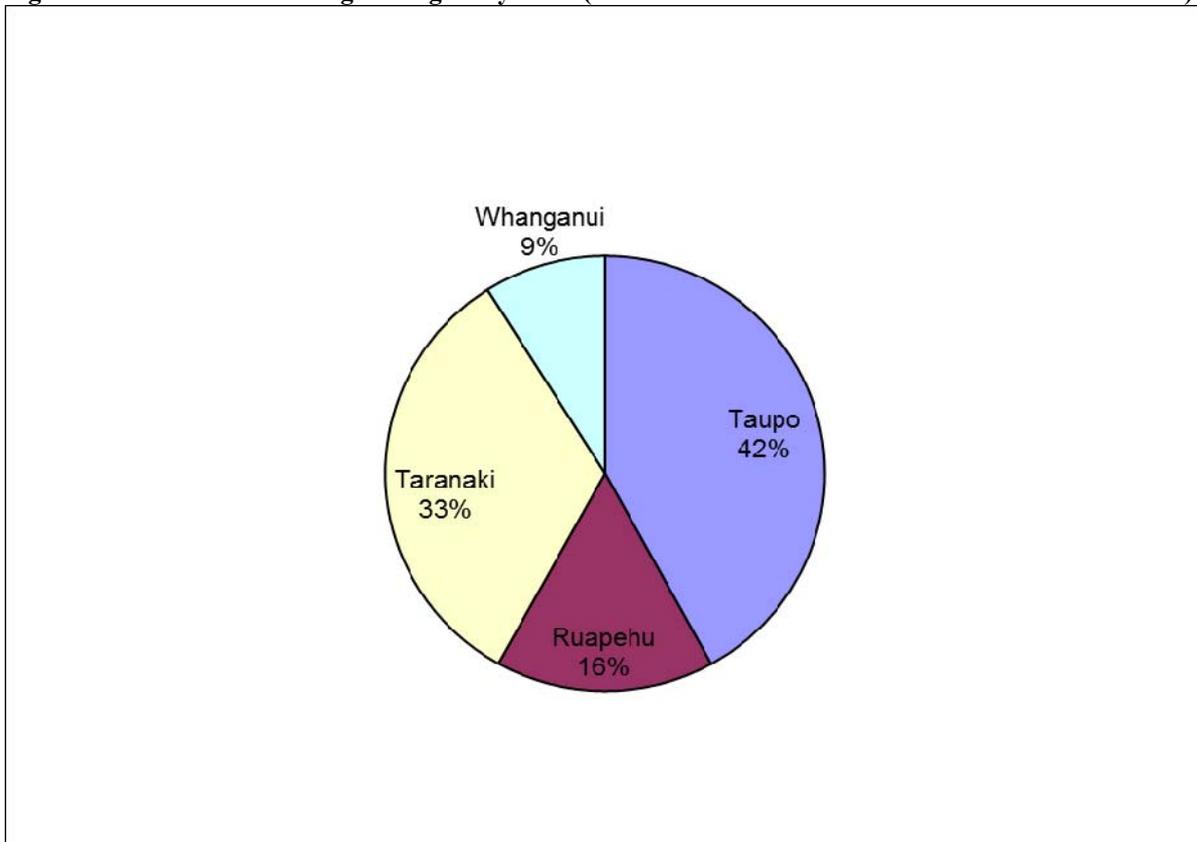
Tourism in the Tongariro Whanganui Taranaki

This section of the report discusses tourism activity at the local and regional level. Data from the Commercial Accommodation Monitor shows that New Zealanders are responsible for the majority of tourism activity in Tongariro Whanganui Taranaki. Within the region, domestic tourism is focussed on Taupō and Taranaki while the smaller international market is centred around the Taupō and Ruapehu areas. International and domestic tourism have both declined in the Tongariro Whanganui Taranaki region since 2008, but there are different trends operating in different sub-regions. International tourism has actually increased in Taupō and Taranaki, against the regional and national trend, although spending by international visitors has declined across the region.

Commercial guest nights

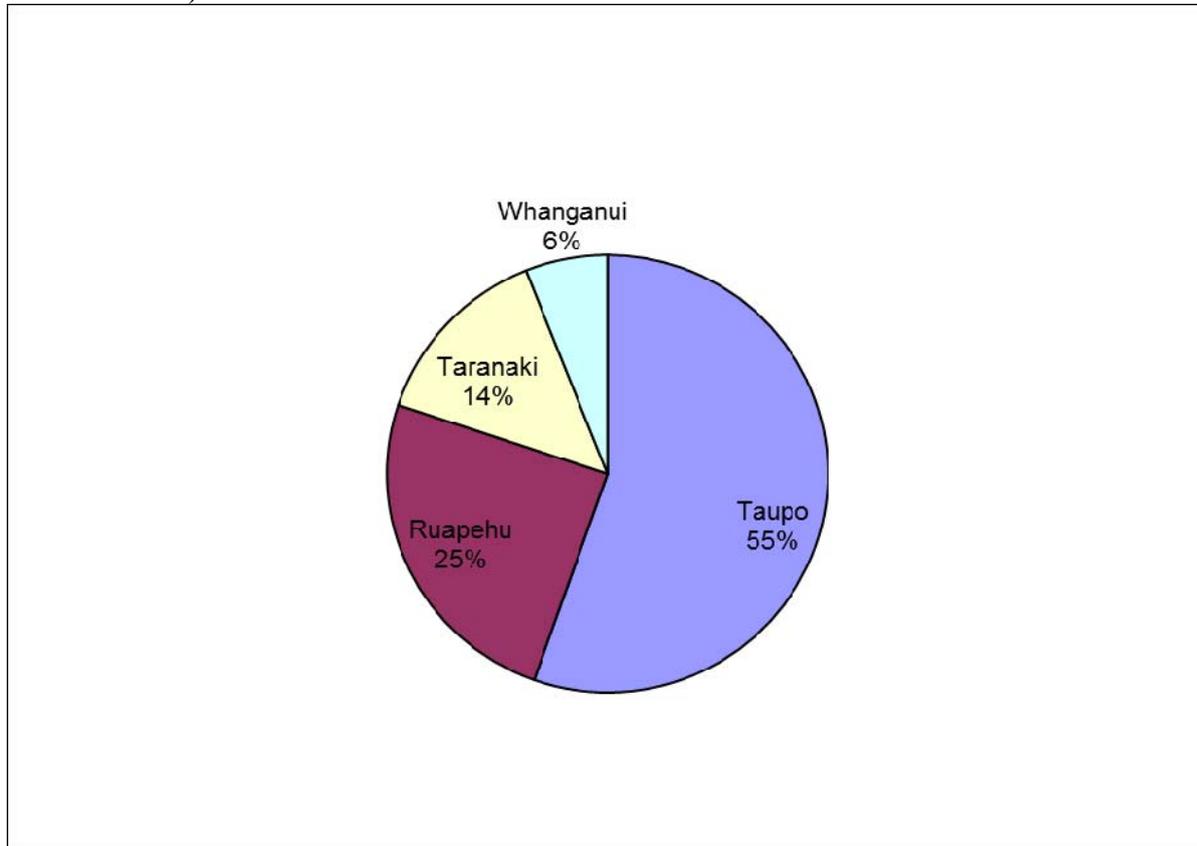
The Tongariro Whanganui Taranaki region is predominantly a domestic holiday destination. In 2012 domestic visitors accounted for 73% of guest nights in the region while 27% were from international visitors (Statistics New Zealand 2013). The Taupō Regional Tourism Organisation (RTO) area received the largest share of domestic guest nights with 42% while one third of domestic guest nights were in Taranaki. The Whanganui RTO area received less than 10% of the region's domestic guest nights (Figure 14).

Figure 14: Share of domestic guest nights by RTO (Source: Commercial Accommodation Monitor 2012)



The Taupō RTO area (55%) received more than half of all international guest nights in the Tongariro Whanganui Taranaki region in 2012 while a quarter were received by the Ruapehu RTO area. Taranaki is a much less significant area for international tourism compared to domestic and received only 14% of the region's international guest nights. The Whanganui RTO area received only 6% (Figure 15).

Figure 15: Share of international guest nights by RTO (Source: Commercial Accommodation Monitor 2012)



The four Regional Tourism Organisation areas within Tongariro Whanganui Taranaki Conservancy together received 2,054,151 guest nights in 2012. This represented approximately 6% of New Zealand's total guest nights (Statistics New Zealand 2013). Information on the percentage of overseas tourists visiting the region shows a slightly higher level of activity. According to the Visitor Experience Monitor (Tourism New Zealand 2012a), 9% of international tourists visited the Taranaki area in 2011/12 while 14% visited the combined Manawatu - Whanganui area. The percentage who visited the Taupō and Ruapehu areas was not clear as these were combined into other regions.

Total commercial guest nights in the region were down 3.3% on 2008 (Figure 16 & 17) and on the surface this appears to closely reflect the national trend over the same period (-3.2%). Analysis by market (domestic or international) and at the individual RTO level shows a more complex picture (Statistics New Zealand 2013). Overall the region has been relatively insulated from the decrease in international tourism experienced nationally but, in contrast to the national trend, domestic tourism has declined. The key changes were;

- Domestic guest nights have decreased by 4.3% in the Tongariro Whanganui Taranaki region despite a small increase nationally. This was largely driven by a 9.3% decrease in the Taupō RTO area.
- International guest nights increased by 6.1% in Taupō and 5.6% in Taranaki.

- A 12% decrease in international guest nights in the Ruapehu RTO was largely offset by increased domestic guest nights.
- Guest nights in Whanganui fell by 14.1% with large decreases in both the international and domestic markets.

Further information at the individual RTO level is provided in Figures 18 – 21.

Figure 16: Annual guest nights for Taupō, Taranaki, Ruapehu and Whanganui RTOs 2008 - 2012
 (Source: Commercial Accommodation Monitor)

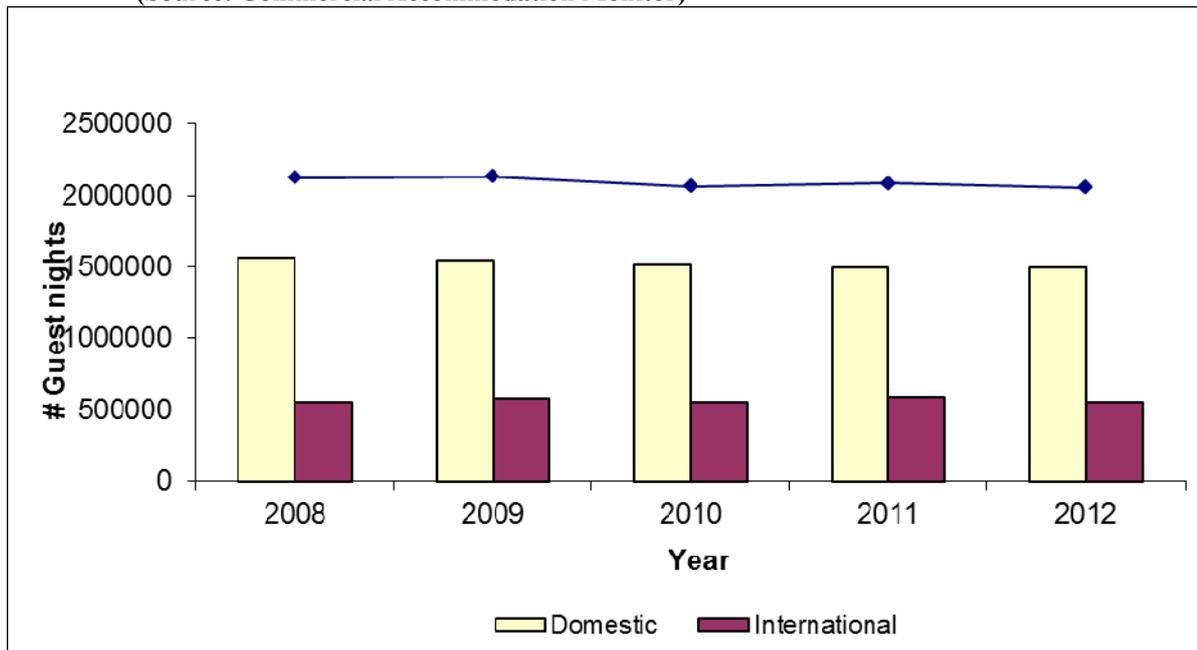


Figure 17: Percentage change in annual guest nights 2008 - 2012
 (Source: Commercial Accommodation Monitor)

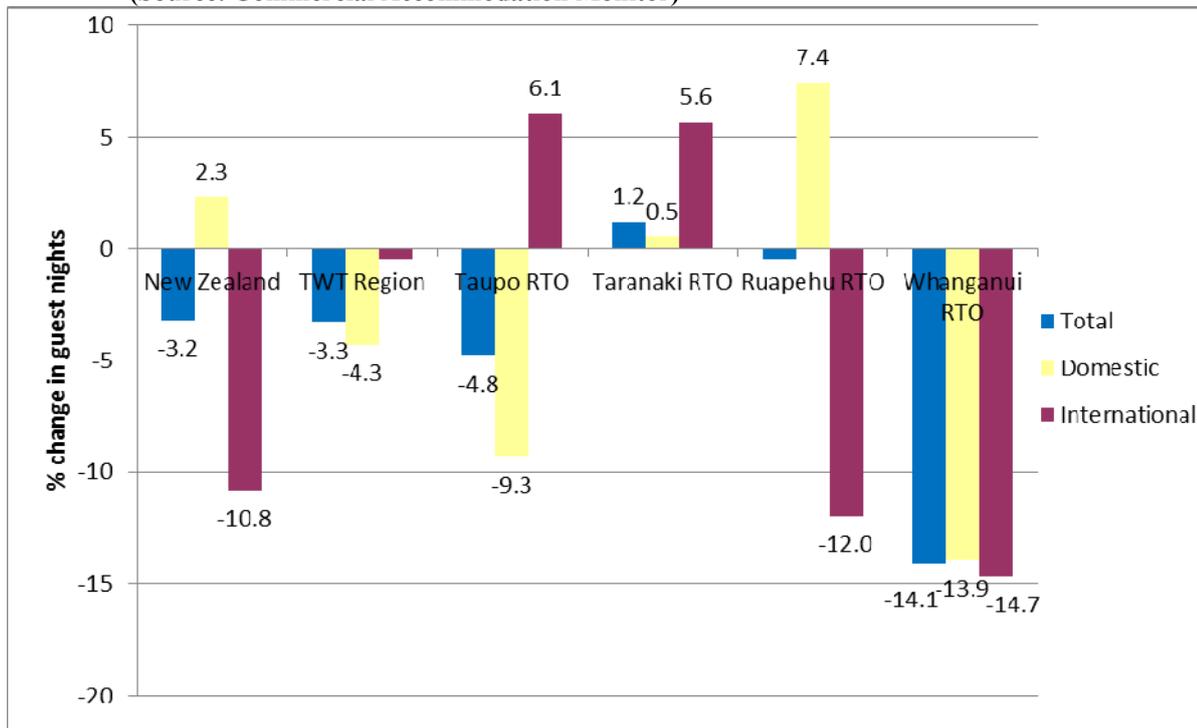


Figure 18: Taupō RTO annual guest nights 2008 - 2012 (Source: Commercial Accommodation Monitor)

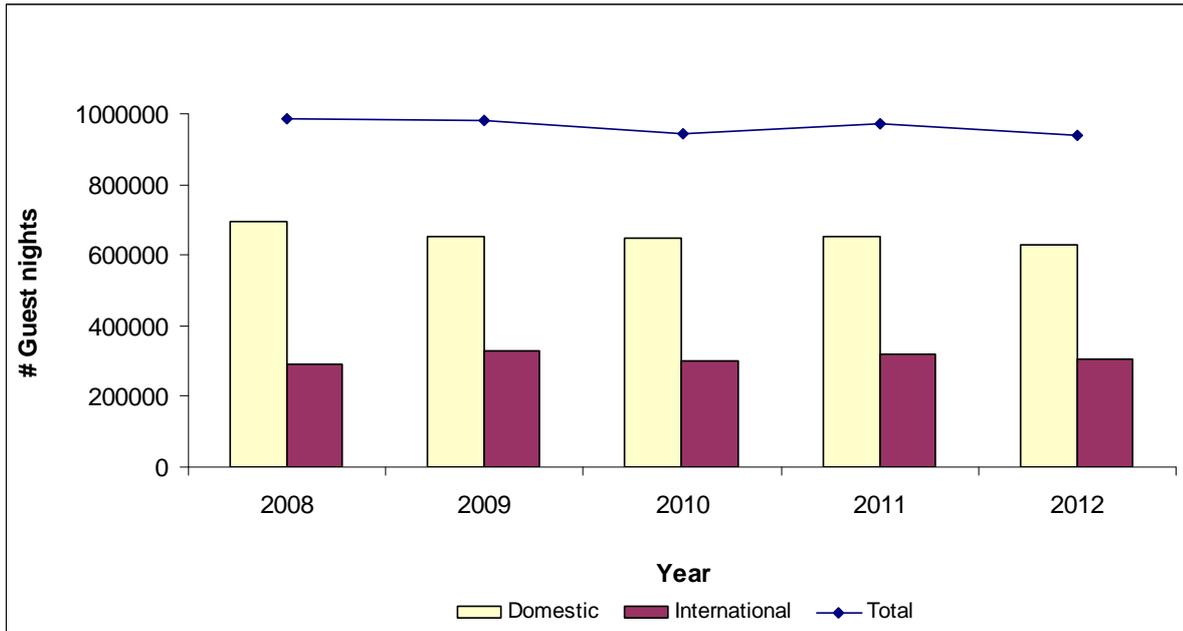


Figure 19: Taranaki RTO annual guest nights 2008 - 2012 (Source: Commercial Accommodation Monitor)

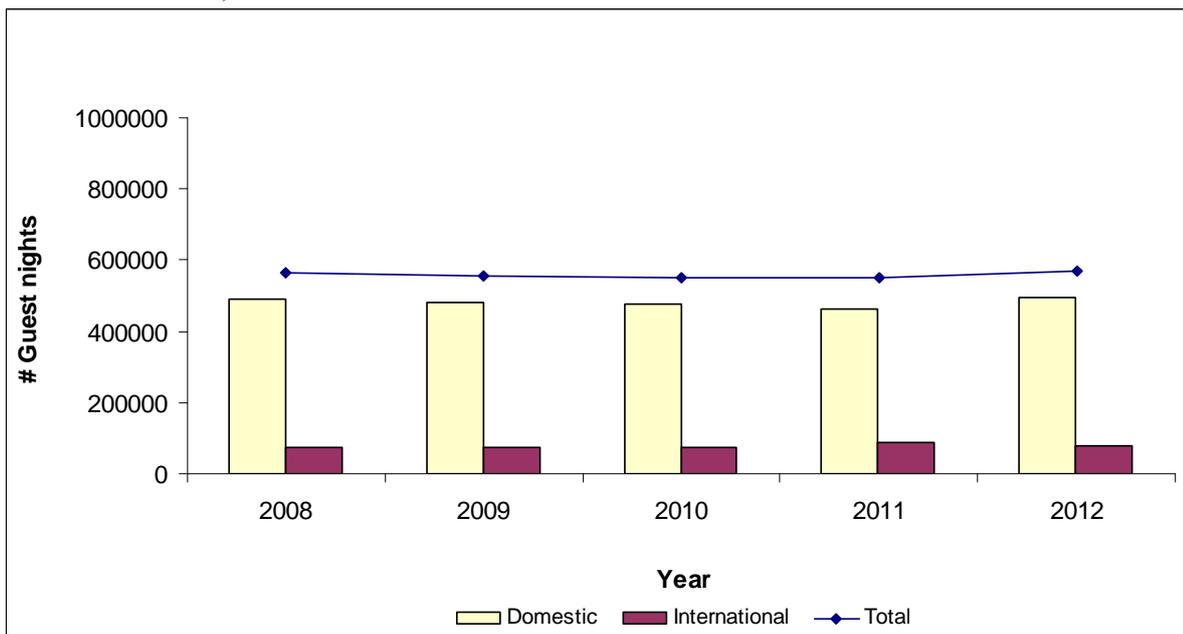


Figure 20: Ruapehu RTO annual guest nights 2008 – 2012 (Source: Commercial Accommodation Monitor)

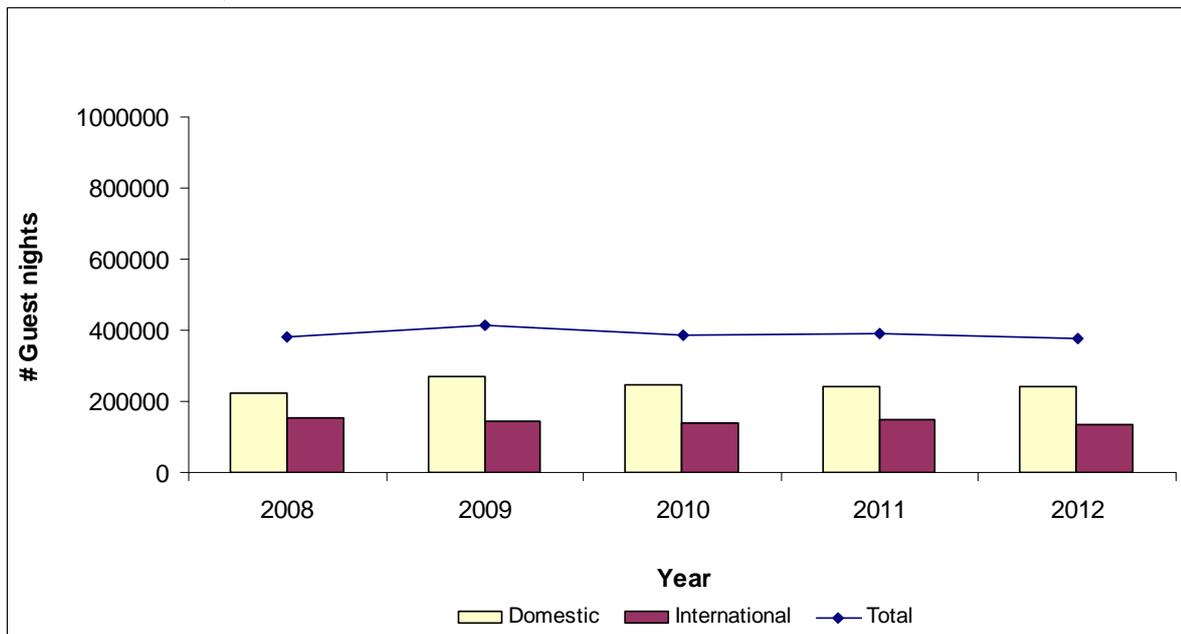
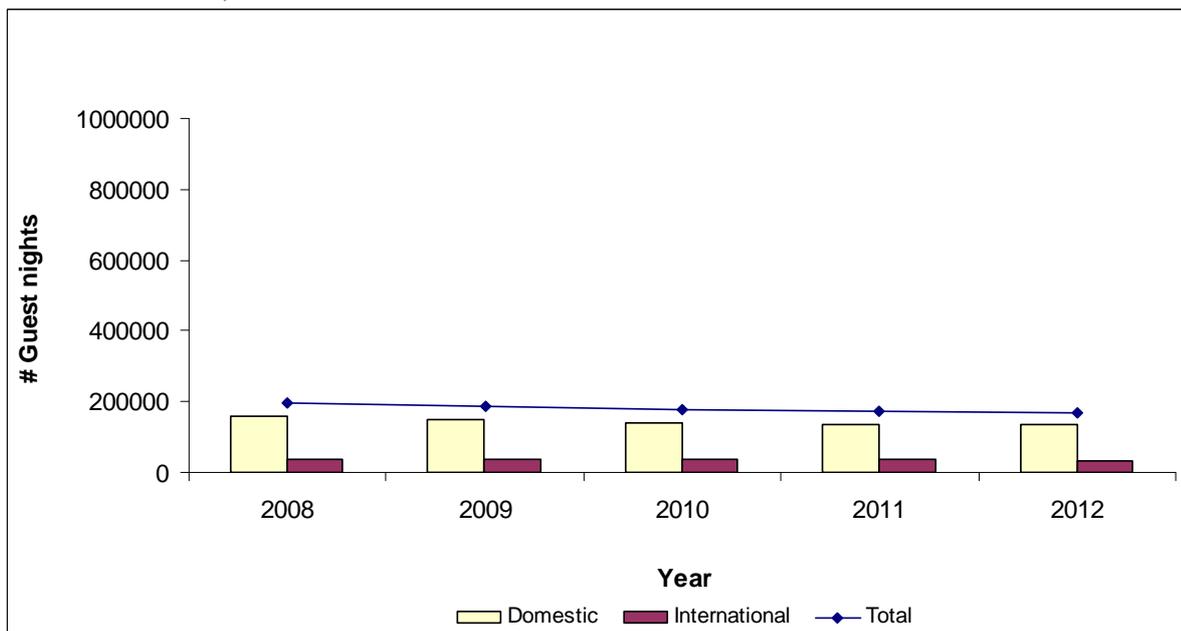


Figure 21: Whanganui RTO annual guest nights 2008 - 2012 (Source: Commercial Accommodation Monitor)



Country of origin and spending by international visitors

Official tourism statistics no longer include information on the number of overseas tourists visiting particular areas of New Zealand. Instead the Regional Tourism Indicator collects information on the number and value of electronic transactions. These are analysed by country to indicate size of the international market in each region (Table 6 & 7). 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 Tongariro Whanganui Taranaki region is vulnerable to the decline in numbers from the UK and USA being experienced nationally.
 - Spending by UK visitors decreased in all four RTO areas by between 22% and 41%.
 - Spending by American visitors has dropped sharply in Taupō (-30%) and Whanganui (-22%). However, there were small increases in spending 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 countries are currently larger markets for the Tongariro Whanganui Taranaki region.
- Overall spending by international tourists since 2008 is down 16% in Taupō, down 15% in Whanganui and down 6% in the Ruapehu. Spending increased by 6% in Taranaki.

Table 6: Percentage of international tourist transactions from key markets by RTO 2012 (Source: Regional Tourism Indicators)

	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
Whanganui	42.9%	1.0%	15.0%	9.6%	1.0%	7.9%	0.3%	32,282

Table 7: Change in average monthly visitor spend from key markets by RTO between 2008 & 2012 (Source: Regional Tourism Indicators)

	Australia	China	UK	USA	Japan	Germany	South Korea	Overall change
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%
Whanganui	+31%	No data	-41%	-22%	-65%	-31%	No data	-15%

Use of public conservation land in Tongariro Whanganui Taranaki Conservancy

The Department of Conservation manages a number of significant visitor sites in the Tongariro Whanganui Taranaki region. Limited visitor count data is available from the Department's booking system and network of visitor counters. However there is little long term data available. This data is discussed by area below.

Taupō

The Department manages a large number of popular sites in the Taupō area including Huka Falls, walks along the Waikato and Tongariro Rivers, the Tokaanu Thermal Walk and the Tongariro National Trout Centre. It also manages the Taupō fishery which is a significant driver of tourism in the area.

Long term monitoring data is only available for the Taupō Fishery and two of the region's tracks - the Lake Rotopounamu and Round the Mountain Tracks. Counting has recently been established at a number of other locations however. Because of the limited amount of data it is not possible to assess the long term trends in use of public conservation land in the area or to compare this with official tourism statistics. The available data is summarised below.

- The track between Spa Road and Huka Falls is the busiest monitored site in the Taupō area. It received more than 25,000 visitors in 2012. This was down 10.5% on the previous year.
- Three other tracks in the vicinity of Taupō are monitored.
 - The Kawakawa Bay Track was enjoyed by 6896 visitors in 2012 (up 24.6%). More than three quarters of visitors on this track were riding bikes.
 - A single year of data for the Rangatira Point shows that 3090 people visited in 2012.
 - 18,732 hits were recorded on the W2K counter in 2012, an increase of 27.6%. This track is managed by Bike Taupō and more than 80% of visitors to the track are bikers.
- Total Taupō fishing licence sales decreased from 54,086 to 41,363 (-23.5%), between the 2007/08 and 2011/12 seasons continuing a general downward trend in licence sales over the past 24 years, since sales peaked at over 82,000 in the 1987/88 season.
- Numbers on the Lake Rotopounamu Track, near Turangi, peaked in 2010 but overall increased 13.4% between 2008 and 2012. The annual number of visitors rose from 9067 to 10279 (Figure 22).
- More than 20,000 hits were recorded on the Tongariro River Walkway track counter. There was an increase of 0.9% between 2011 and 2012.

- Counters are also installed on two tracks in the Kaimanawa Forest Park.
 - Hits on the Tree Trunk Gorge Track counter increased from 2471 to 2522 (+2.1%)
 - Hits on the Umukarikari Track increased 11.4% from 1273 to 1418.
- Use of the Round the Mountain tramping track has declined by 21% since 2008 (Figure 23).

Figure 22: Annual visitor numbers: Lake Rotopounamu Loop Track

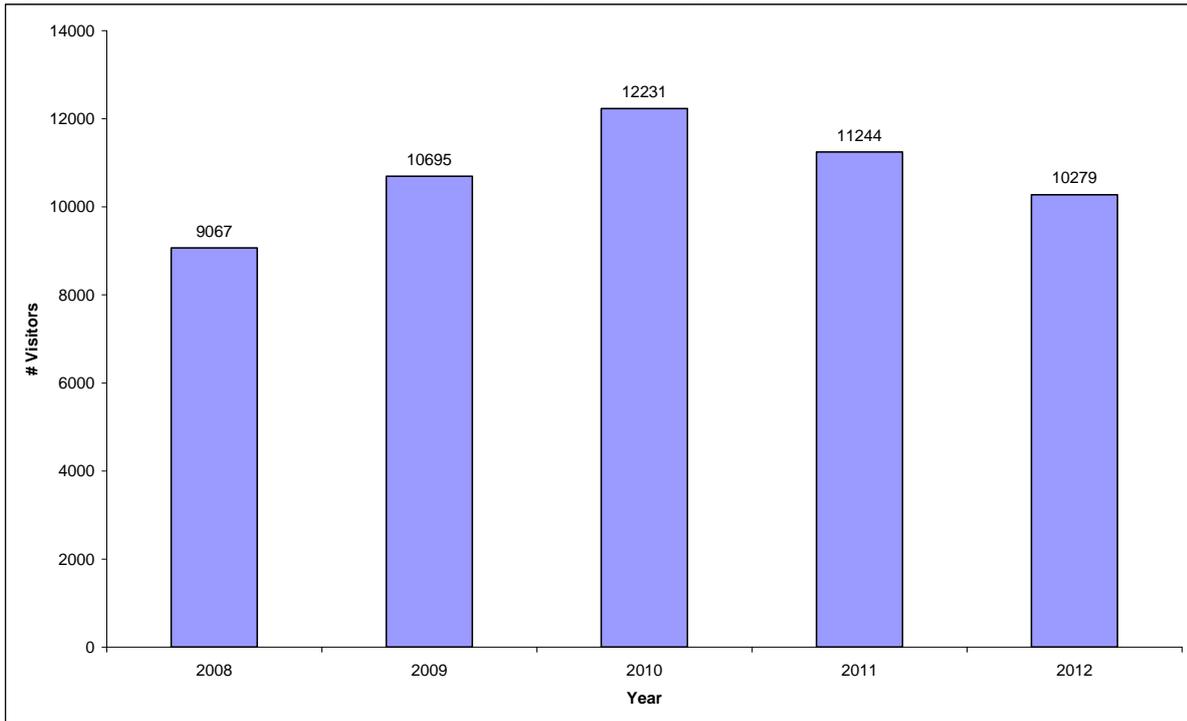
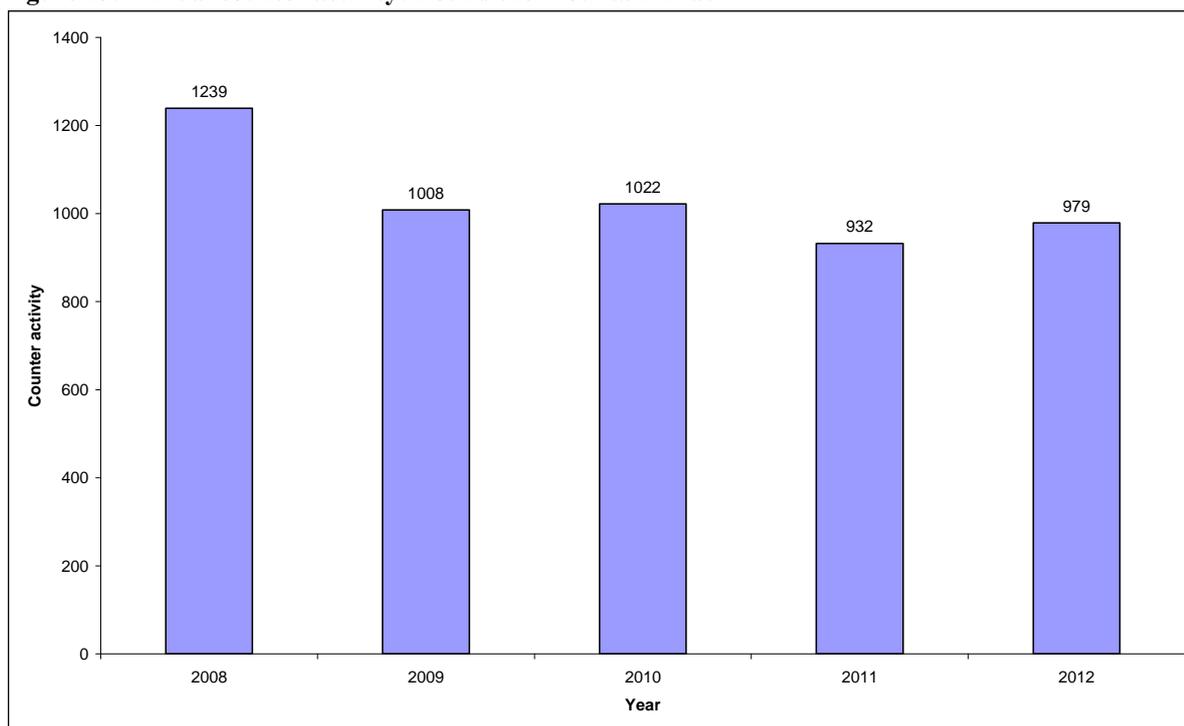


Figure 23: Annual counter activity: Round the Mountain Track



Taranaki

DOC manages a number of sites accessed from road ends on Mt Taranaki. Popular sites include Stratford Plateau, North and East Egmont, Dawson Falls and Lucys Gully. DOC also manages a number of lower profile sites in the wider Taranaki Area. Long term trend data for sites in Taranaki does not show an overall trend across the area. The data is as follows:

- North Egmont Visitor Centre is the most popular monitored site in Taranaki. It received 72,481 visitors in 2012 which was up from 69,260 in 2011 (+4.7%). In contrast the number of visitors on the North Egmont Nature Walk dropped 12.2% between 2008 and 2011 from 7784 to 6838 (Figure 24). Other tracks at the North Egmont Road End are not monitored.
- There is also significant visitor use at Dawson Falls on the South Eastern side of Mt Taranaki (Figure 25).
 - The Kapuni Loop Track received 35,459 visitors in 2012 which was a decrease of 16.1% from the previous year.
 - 37,993 visitors used the Dawson Falls Visitor Centre. This was up 3.6% on the number of visitors in 2010.
 - The Ridge Loop Track was monitored between 2006 and 2011. Use of the track declined by 24.6% over this period from 3722 down to 2805 visitors.

- Use of the Manganui Gorge Track on the eastern side Mt Taranaki has trended downward in recent seasons but there was a sharp increase in 2011/12. Numbers in 2011/12 were 5.2% above 2006/07 levels. The wheelchair accessible Potaema Track is also monitored but caters for fewer than 1000 visitors annually (Figure 26).

- Four other visitor counters are located around Mt Taranaki. Two tramping tracks on the western side of Mt Taranaki (the Ihaia and Oanui Tracks) both receive fewer than 600 visitors per year. Use of the Pouakai Circuit, in the north, is unclear as visitor flows are more complex. Activity on one section - the Ahukawakawa Track increased 24% between 2009 and 2012. A smaller increase of 6.1% was recorded on the Henry Peak - Kaiauai Track between 2008 and 2011 (Figure 27).

- Counters are also installed at three other sites in the wider Taranaki area.
 - Visitor activity at the Ratapihipihi Scenic Reserve Track (Figure 28) has declined sharply. There were 4404 hits on the visitor counter in 2012 compared to 6612 in 2009 (-33.4%).
 - A single year of activity data is available for the Whitecliffs Walkway for 2011/12. 1403 hits were recorded on the counter.
 - Two years of visitor counts are available for the Arahake Bush Loop Walk. Visitor numbers declined from 1490 in 2010 to 1203 in 2011. A drop of 19.3%.

Figure 24: Annual visitor numbers: North Egmont Visitor Centre & Nature Walk

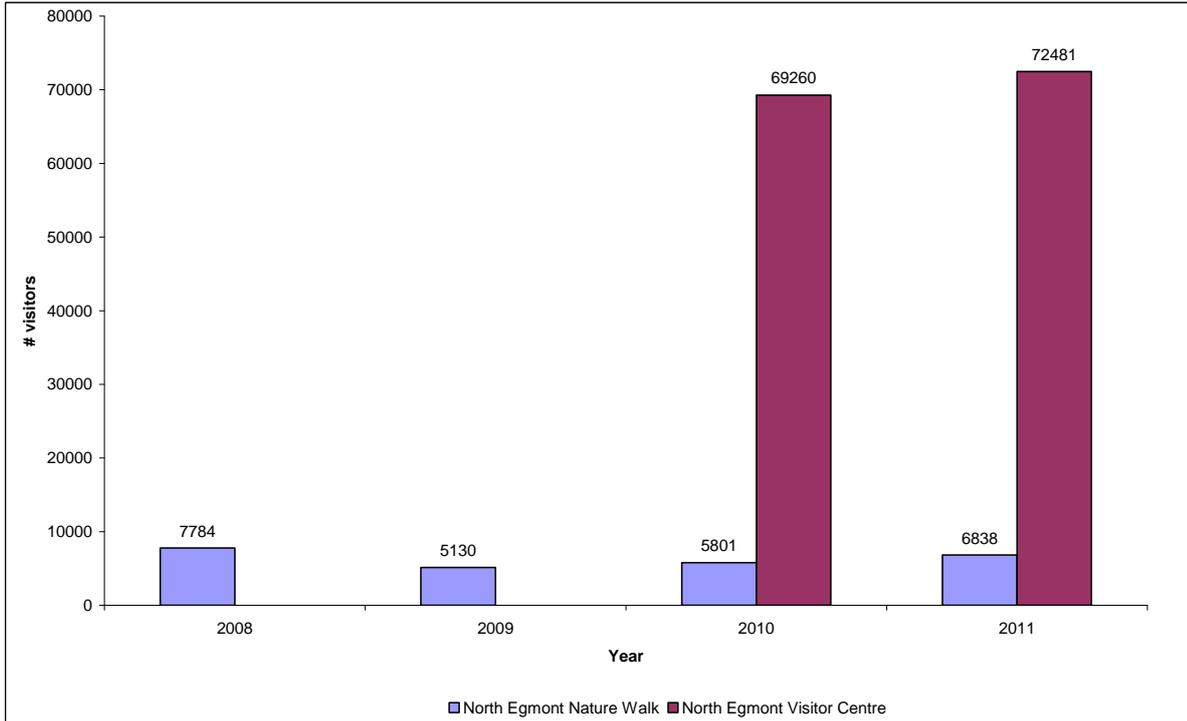


Figure 25: Annual visitor numbers: Dawson Falls Visitor Centre, Kapuni and Ridge Loop Tracks

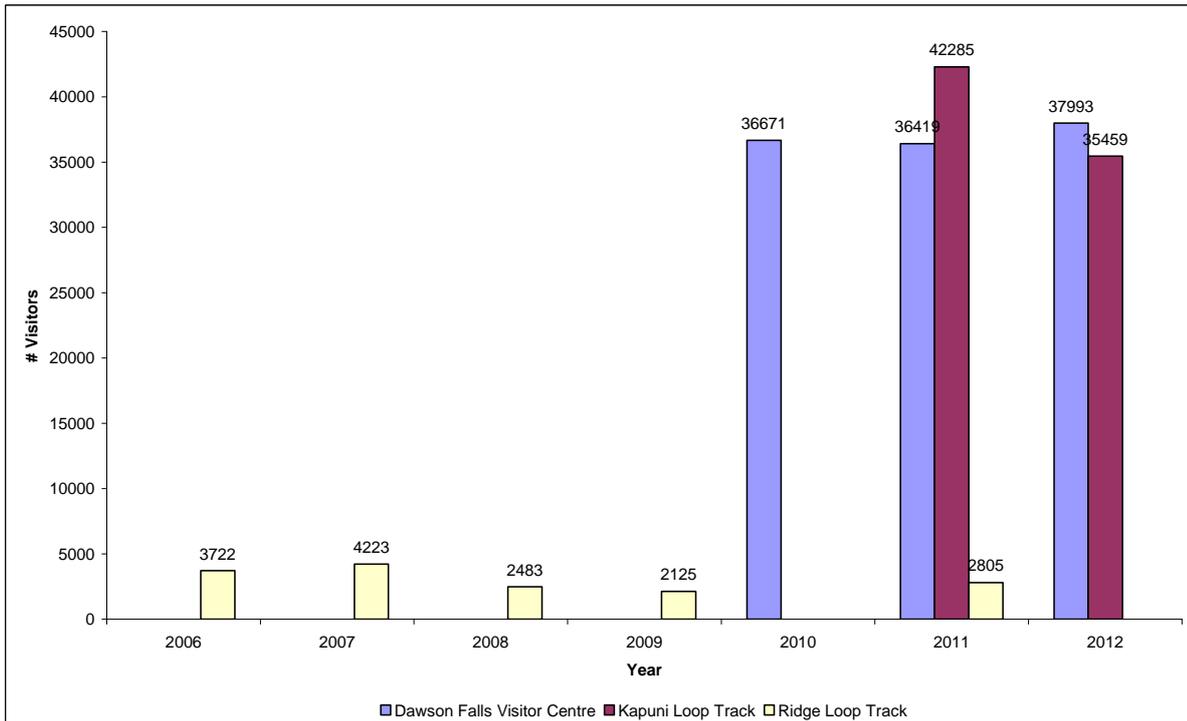


Figure 26: Annual visitor numbers: Manganui Gorge & Potaema Tracks

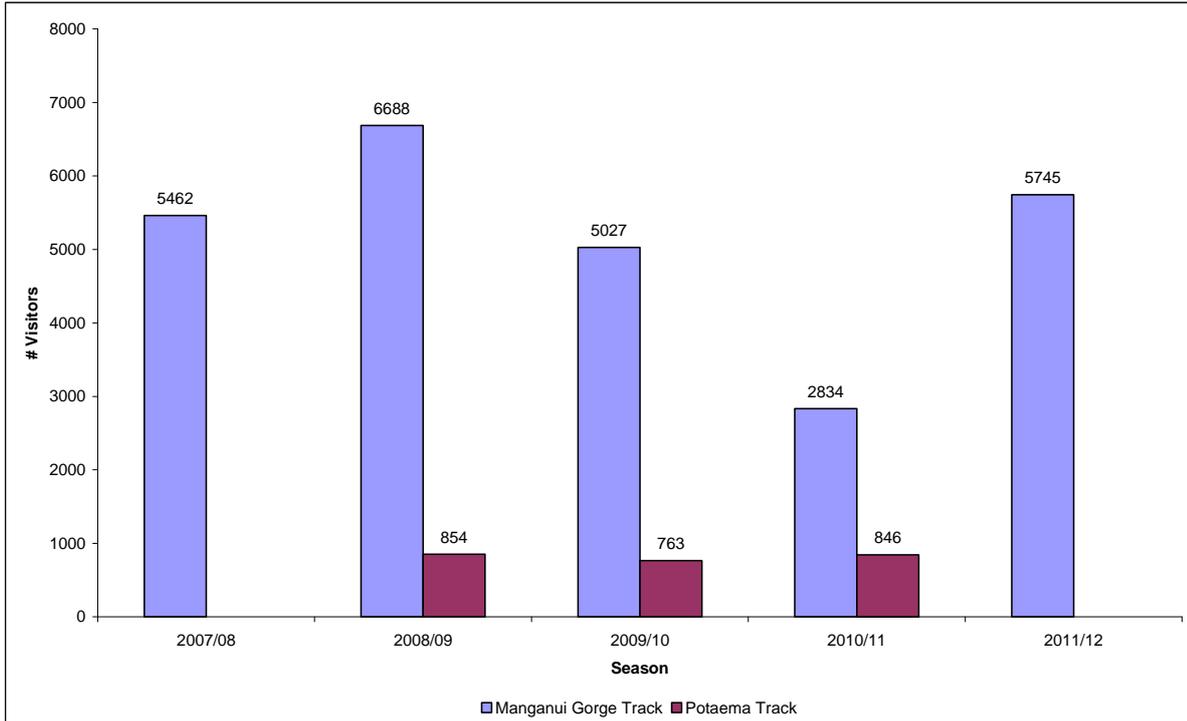


Figure 27: Annual counter activity: Pouakai Circuit

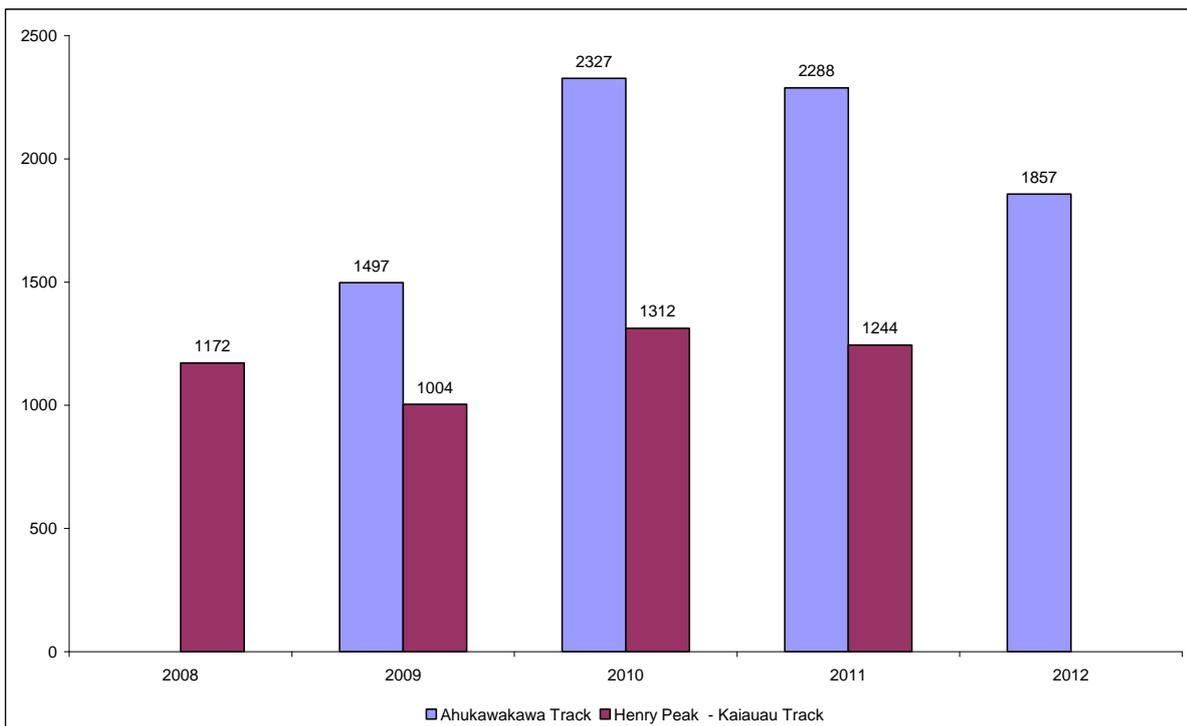
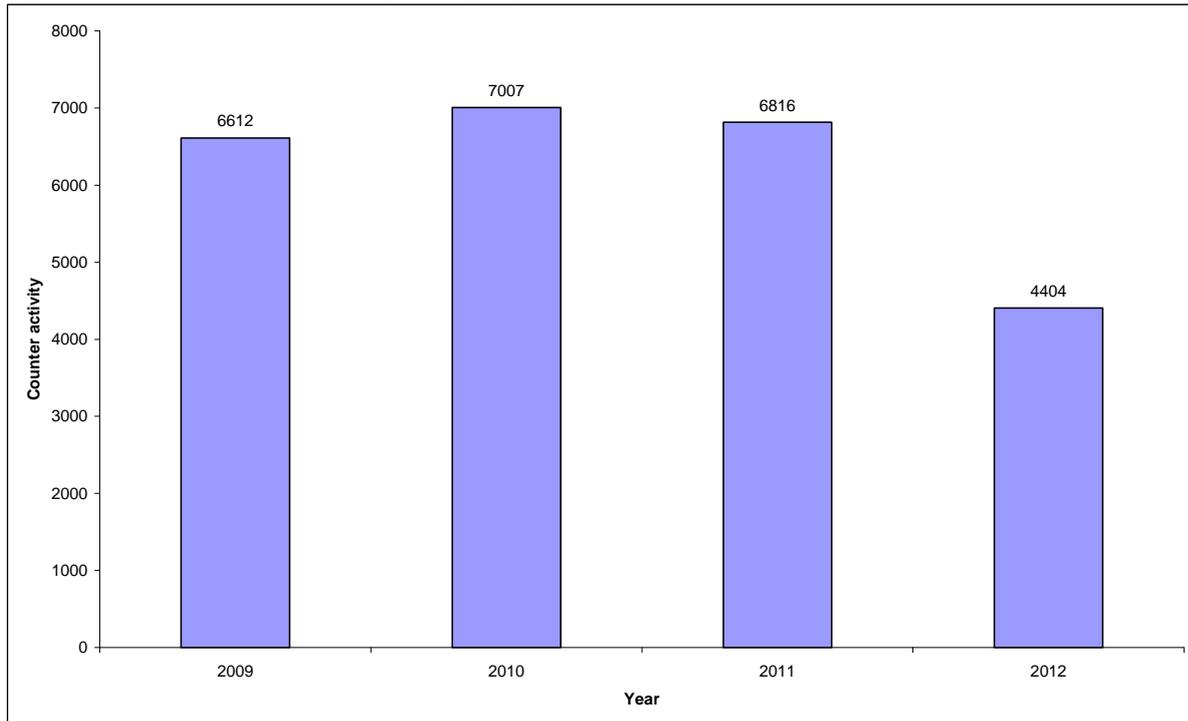


Figure 28: Annual counter activity: Ratapihipihi Scenic Reserve Track



Ruapehu

Popular DOC sites in the Ruapehu area include the Tongariro Alpine Crossing, Tongariro Northern Circuit, the Whakapapa Visitor Centre, local walks around Whakapapa Village and the Ohakune Old Coach Road. Visitor numbers at three sites around the Central Plateau (Taranaki Falls, Tongariro Alpine Crossing and Tongariro Northern Circuit) peaked in 2010 but have shown an upward trend over the last 5-6 years. This contrasts with a relatively static tourism trend for the Ruapehu area overall. Numbers at the Whakapapa Visitor Centre followed the downward trend in international tourism in the region. Trends for specific sites are as follows:

- The number of visitors using the Whakapapa Visitor Centre declined 17.5% between 2002 and 2010 (Figure 29).
- Use of the Tongariro Alpine Crossing peaked in 2010 (Figure 30). Usage is estimated at 70-80,000 visitors per year but the track counters only approximate the scale of use. This is because some visitors do short return trips from either end of the track and cross the appropriate counter twice. Prior to the recent eruption most visitors carried on to the Ketatahi Road End and crossed both counters only once.
- Use of the Tongariro Northern Circuit Great Walk (Figure 31) has increased 14.1% from 4950 in the 2006/07 season to 5649 in 2011/12. This increase was driven by a 46.2% increase in domestic visitors. International use declined by 3.9% over this period. Use of the track has dropped slightly from its peak of 5882 visitors in the 2010/11 season.

- The number of visitors using the Taranaki Falls Track, near Whakapapa Village, peaked at 46,630 in 2010 but dropped to 39,520 in 2012. This is still 13.8% above 2006 levels (Figure 32). A single year of data is also available for the Tama Lakes Track. It received 7,489 visitors in 2012.
- Use of the Ohakune Old Coach Road increased 13.9% from 12,991 in 2010/11 to 14,803 in 2011/12.

Figure 29: Annual visitor numbers: Whakapapa Visitor Centre

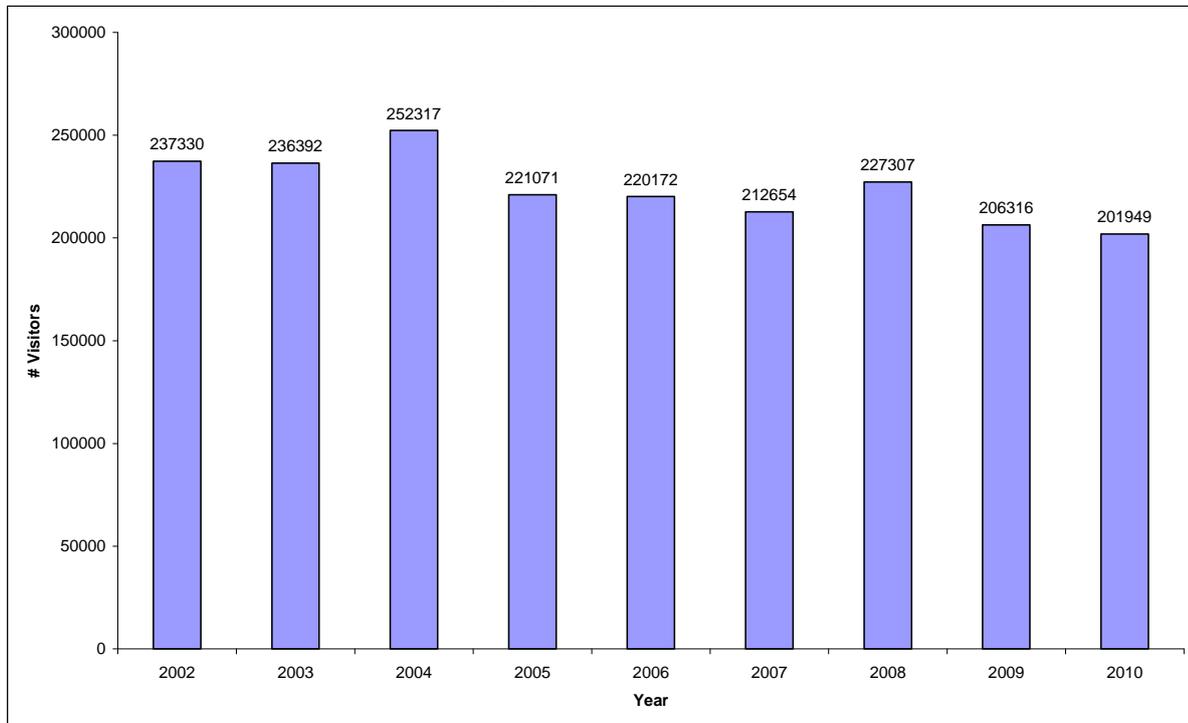


Figure 30: Annual counter activity: Tongariro Alpine Crossing

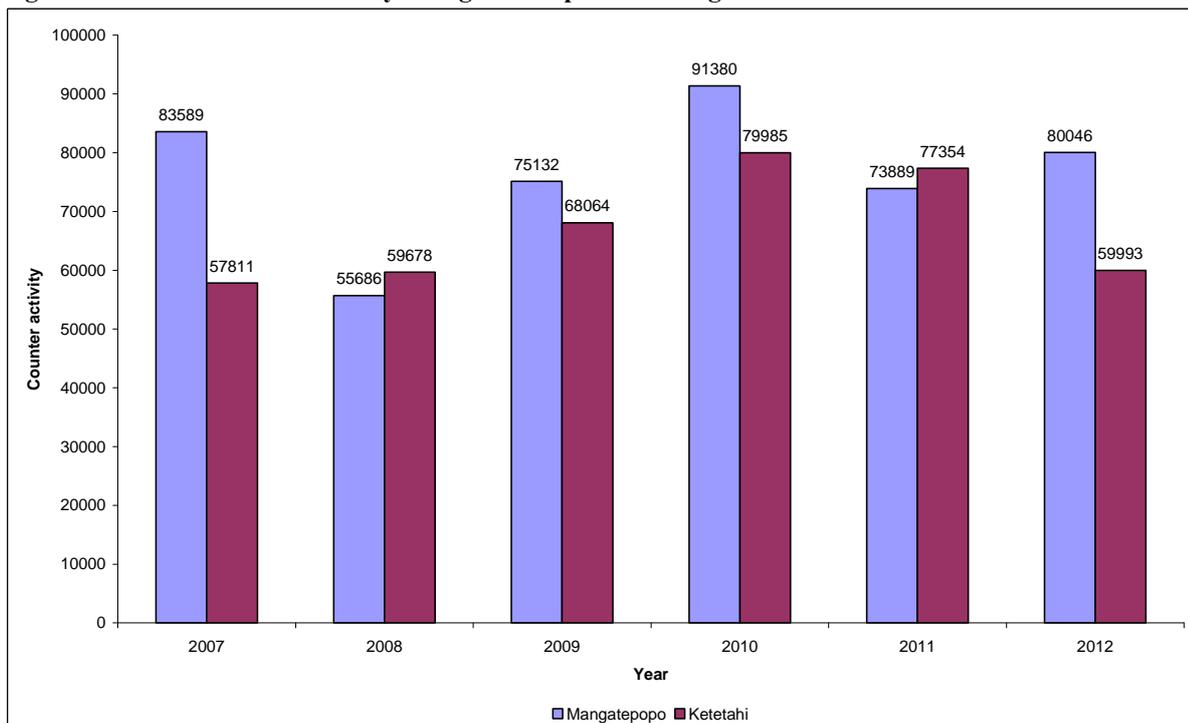


Figure 31: Annual visitor numbers: Tongariro Northern Circuit

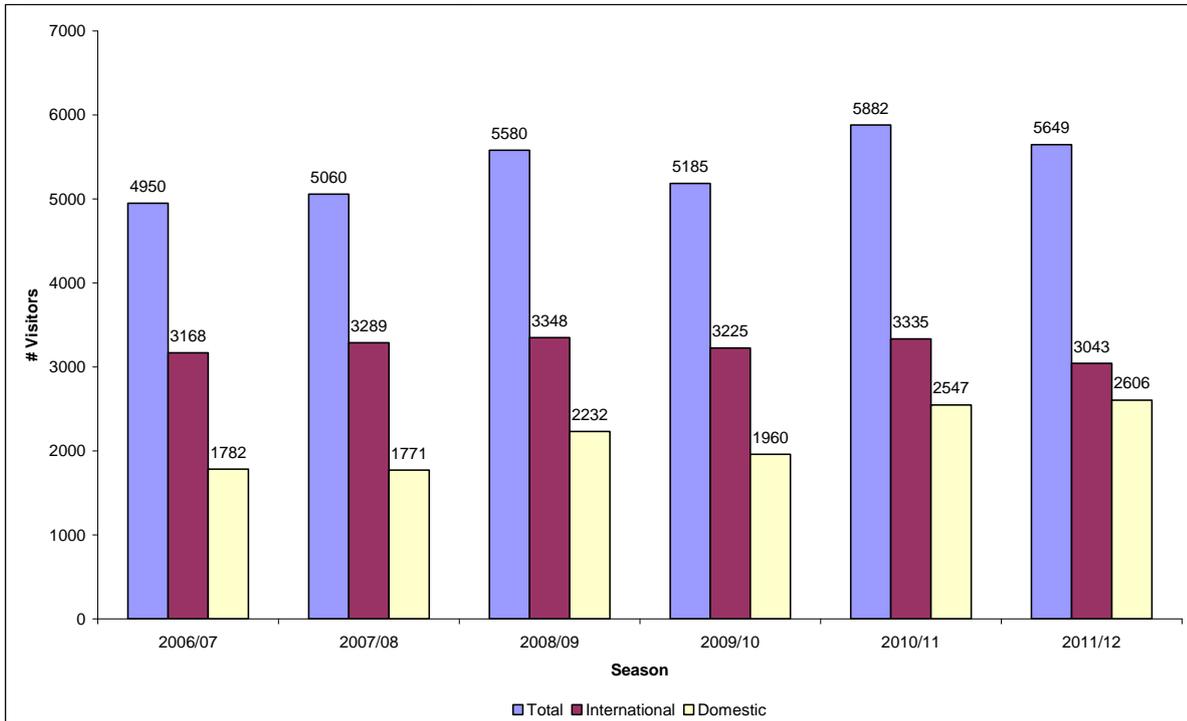
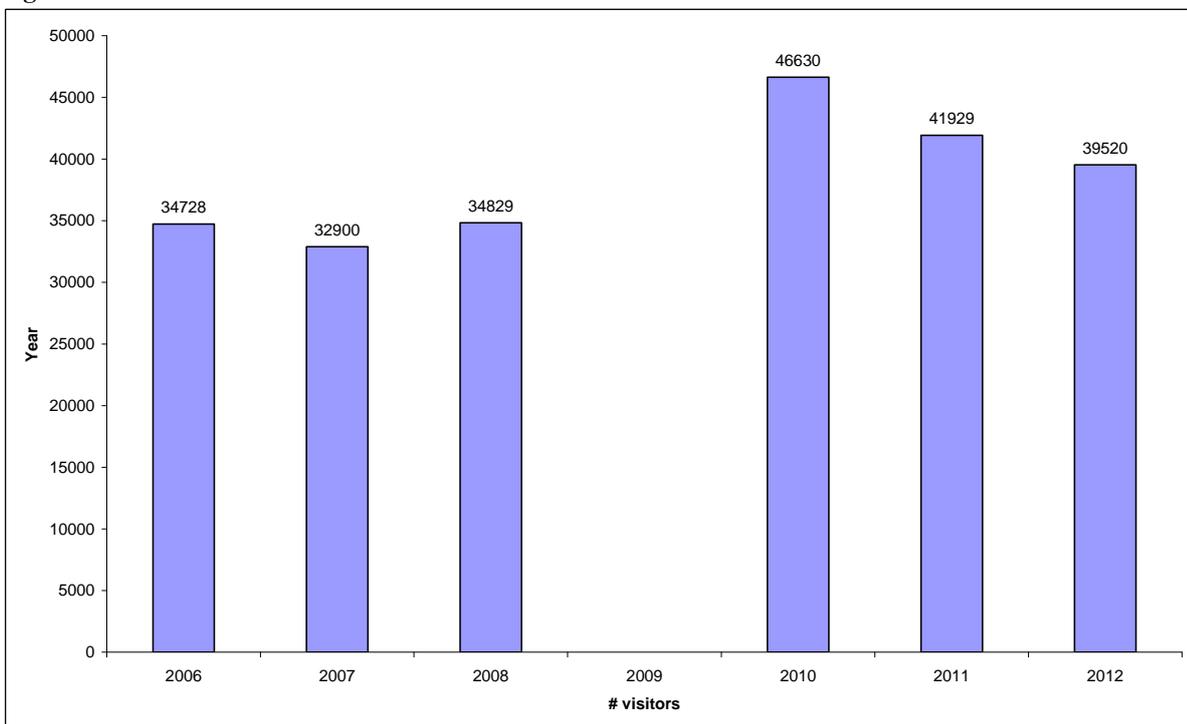


Figure 32: Annual visitor numbers: Taranaki Falls Track



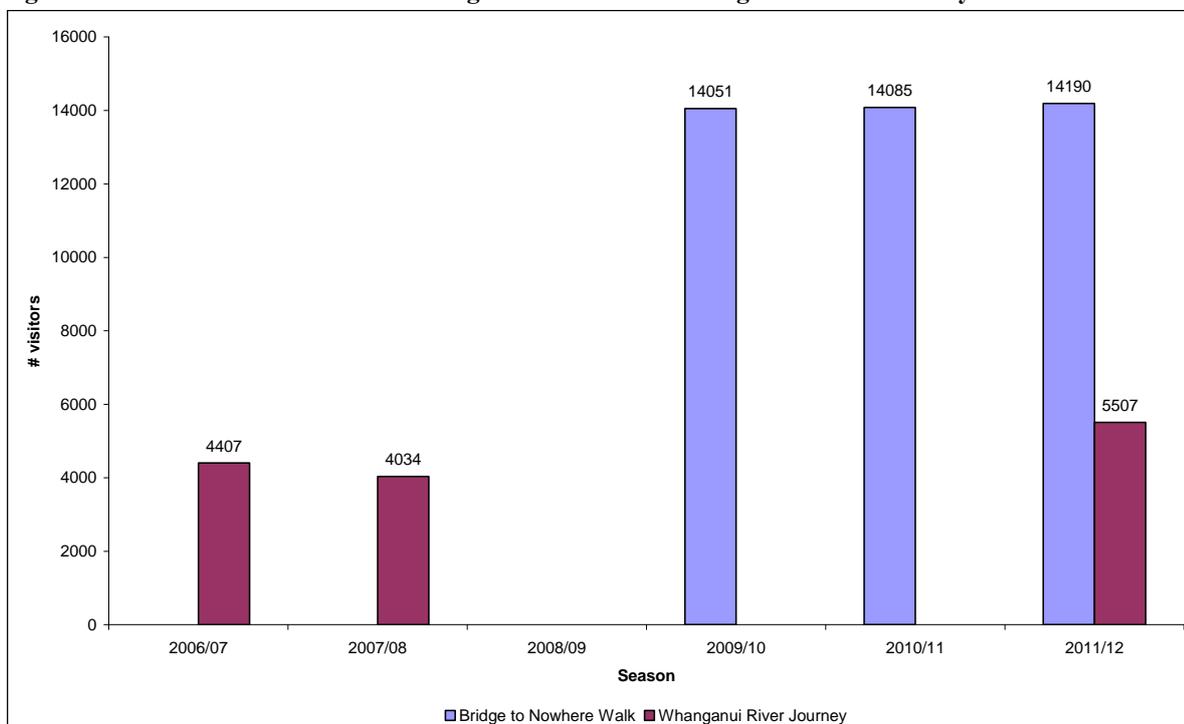
Whanganui

There are only a handful of popular DOC managed sites in the Whanganui area and the available data for these sites is very limited. While tourism has declined significantly in Whanganui, use of two high profile

sites – the Whanganui River Journey and the Bridge to Nowhere Walk, has not followed this trend (Figure 33). These sites are accessed from Ohakune and domestic tourism has actually grown in this part of the region. Trends for specific sites are as follows:

- The number of visitors on the Whanganui River Journey (a canoe trip within the Department’s Great Walk brand) increased 25% between 2006/07 and 2011/12. It now receives approximately 5500 visitors. Over this period the number of New Zealanders doing the trip increased by 43.5% while international visitors decreased 1.7%.
- Use of the Bridge to Nowhere Walk increased only slightly (1%) between the 2009/10 and 2011/12 seasons. It received 14,190 visits in 2011/12.
- Activity at Gordon Park Scenic Reserve, near Whanganui dropped 8.3% between the 2009/10 and 2010/11 seasons. 5438 hits on the counter were recorded in 2010/11.
- A newly established visitor counter on the Mangapurua Track recorded 1983 hits on the counter in 2012 but complex visitor flows make it difficult to convert this into an estimated visitor count. Three other locations in the Whanganui area (Atene Viewpoint Walk, Te Maire Loop Track and an additional site at Mangapurua) have track counters but they each receive fewer than 1000 visitors per year.

Figure 33: Annual visitor numbers: Bridge to Nowhere & Whanganui River Journey



Trends in New Zealanders' use of the outdoors

This section examines trends in New Zealanders' participation in various outdoor recreation activities. Available information shows that walking is the most popular activity for New Zealanders both on and off public conservation land. However there is no information on whether its popularity is increasing or decreasing. In contrast, interest in tramping and hunting appears to be on the rise while participation in freshwater fishing is static or declining. There is no long term data that supports the popular perception that mountain biking is increasing in popularity. Information at regional levels is relatively limited and in some cases contradictory. However residents of Tongariro Whanganui Taranaki are more likely to visit public conservation land than New Zealanders as a whole. The available data on participation in outdoor recreation is summarised below.

Data sources

There are two main sources of trend information for outdoor recreation activities at national level; the Active New Zealand Survey (Sport NZ 2013) and the Roy Morgan Single Source Database (Roy Morgan Research 2012). The Roy Morgan Single Source Database (referred to as the Roy Morgan Survey) is likely to be the more reliable of the two data sources due to its scale (approximately 12,000 surveys per year), consistency of method, frequency and the fact that it is more up to date (it covers the period from 2002-2011). On the other hand it may under estimate participation levels as the available data only tracks the number of people who define themselves as "regular" participants.

The Active New Zealand Survey was conducted by Sport and Recreation New Zealand (now Sport NZ). It was last conducted in 2007/08 and will run for the fifth time in 2013. Unlike the Roy Morgan Survey, Active New Zealand counts a respondent as a participant if they engaged in an activity at least once in a 12 month period. This results in higher participation levels in the Active New Zealand Survey compared to the Roy Morgan. Higher participation levels may also occur because the methodology of using face to face interviews in people's homes is more conducive to gathering detailed information on participation than the self completion surveys used by Roy Morgan.

Data from previous Active New Zealand surveys was summarised in an earlier internal DOC report (Rundle 2009) and this report highlighted some deficiencies with the trend data (which Sport NZ do not themselves publish). The specific issues identified were that definitions of different activities have not been consistent across the four iterations of the survey. Also the surveys have not used consistent age categories. The 1997, 1999 and 2001 surveys captured respondents aged 18 years and over, while the most recent interviewed those aged 16 years and over.

Two other surveys also provide useful data. The Domestic Travel Survey provides information about attractions visited and the activities undertaken by New Zealanders while on holiday. Data from the DTS is only available for two full years (2010 and 2011) and activities undertaken within 40 km of a respondent's home (i.e. local recreation) are generally excluded. This data has already been summarised in an earlier section of this report.

The National Survey of New Zealanders, now in its second year, provides an indication of the popularity of various recreation activities on public conservation land. It asks respondents to indicate the main activity undertaken on their most recent visit to a DOC managed area. There a number of other surveys providing information relevant to specific activities such as camping, hunting and fishing. These reports are introduced alongside the discussion of individual activities below.

The strengths and weaknesses of both surveys should be considered when using the information reported below. Other data sources used include DOC's national survey of New Zealanders (Premium Research 2012), the Domestic Travel Survey and a number of surveys that are relevant to single activities.

Participation levels and trends

A short summary is provided below on New Zealanders participation in six of the most common outdoor recreation activities that take place on public conservation land. These are walking, tramping, mountain biking, camping, freshwater fishing and hunting.

Walking

Walking is the most popular sport and recreation activity undertaken by New Zealanders. Estimates on the scale of walking as a recreational activity vary;

- In the 2007/08 Active New Zealand Survey 64.1% of New Zealanders were found to have walked for recreation at least once in the preceding 12 months (Sport and Recreation New Zealand 2009a).
- Walking and trekking was the most common active pursuit undertaken by New Zealanders on trips within New Zealand (Ministry of Business, Innovation & Employment 2013a). It was undertaken on more than 4.7 million trips in 2011.
- Walking is by far the most significant recreational activity undertaken by New Zealanders on public conservation land. Of the 56% of New Zealanders who had visited a DOC managed area in 2011 /12, 35% had undertaken a walk of less than three hours and 10% had undertaken a day walk on their most recent visit. Both the percentage who were walking (+6%) and the overall percentage of New Zealanders visiting areas managed by the Department (+5%), increased significantly compared to the previous year (Premium Research 2012).

Trend data on walking is very limited. It is unknown whether the number of people walking for recreation is increasing or decreasing in the long term.

Participation in walking is high across most groups in society. However some differences are evident.

- The Active New Zealand Survey found that men (52.6%), adults aged 16-24 (42.6%) and Māori (56.6) were less likely to have walked for recreation than other demographics (Sport and Recreation New Zealand 2009d).

- The 2012 National Survey of New Zealanders found that women were significantly more likely than men to have undertaken a short walk (< 3 hours) on their most recent visit to public conservation land (Colmar Brunton Research unpublished data).

Tramping

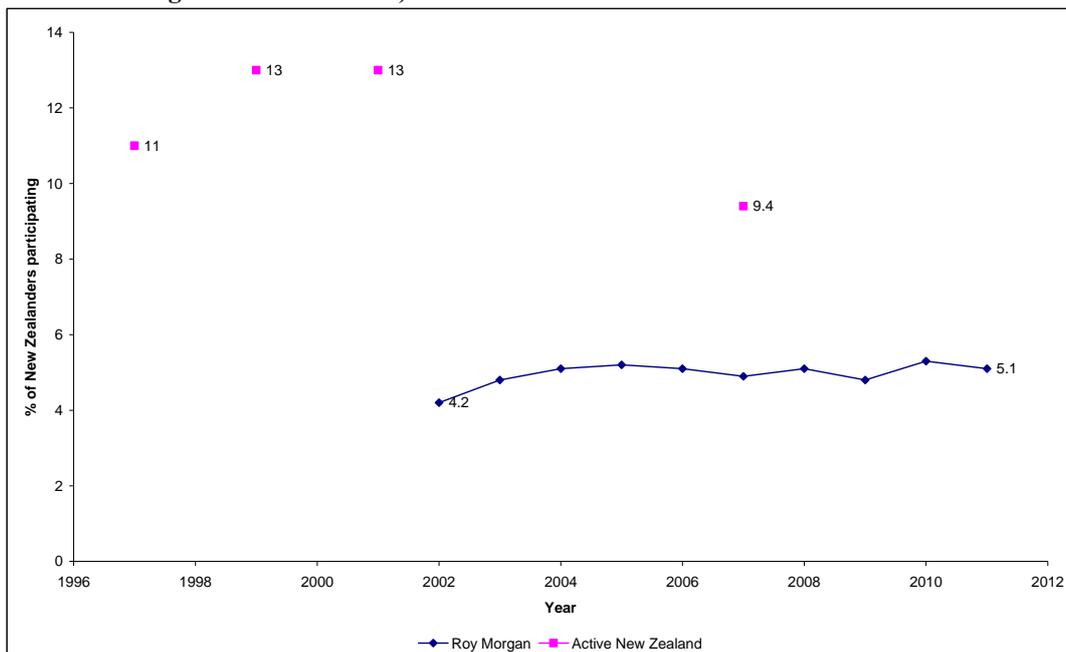
The Department of Conservation provides a significant number of facilities for trampers across New Zealand however understanding participation levels and trends for tramping is difficult. This arises because

- The term “tramping” can mean different things to different people.
- The Active New Zealand (tramping) and Roy Morgan (bush walking / tramping) both use single categories that could contain both day and overnight activities.
- There is disagreement between the two main data sources on whether adult participation in tramping is increasing or decreasing (Figure 34).

Estimates of participation in tramping vary.

- Data from Roy Morgan Research indicates that the number of New Zealanders who are regular participants in tramping and bushwalking has increased from 126,000 (4.2%) in 2002 to 179,000 (5.1%) in 2011 (Roy Morgan Research unpublished data). This suggests the number of trampers has increased by 42% over this period.
- The Active New Zealand survey estimated that approximately 306,000 (5.1%) New Zealanders participated in tramping (Sport and Recreation New Zealand 2009a).
- In the 2011/12 National Survey of New Zealanders 3% of visitors to public conservation land had undertaken an overnight or multi day tramp on their most recent visit (Premium Research 2012). This percentage was unchanged from the previous year.

Figure 34: Adult participation in tramping (Source: Sport and Recreation New Zealand & Roy Morgan Single Source Database)



There is more agreement between the surveys on the demographic characteristics of trampers. They suggest that more than 60% of trampers are aged 35 and over and that there are more male than female trampers (Sport and Recreation New Zealand 2009c, Roy Morgan Research 2011).

Concerns that tramping does not appeal to younger age groups appear to be unfounded.

- The Roy Morgan Survey shows a recent trend of increased participation in tramping among New Zealanders aged 18-24. It is estimated that there were only 9,000 regular trampers in this age group in 2002 but this rose sharply to 29,000 in 2011 (Roy Morgan Research unpublished data).
- The Active New Zealand survey estimated that there were 58,000 trampers in the 16-24 age group. Their participation rate of 9.4% was only slightly below the 10.7% participation found in the 25-49 age group (Sport and Recreation New Zealand 2009c).
- The National Survey of New Zealanders also found much higher levels of participation in tramping among 18-24 year olds compared to the overall population (Colmar Brunton Research unpublished data).

Mountain biking

Mountain biking covers a diverse range of biking activities and, like tramping, there are issues with definitions. In particular people using easier off road cycle trails, such as the Otago Central Rail Trail, may not self-identify as mountain bikers in surveys. They may also not fall into other categories that are used, (such as road cycling in the Active New Zealand Survey). This means that the importance of cycling or mountain biking as an activity could be under estimated or that data will not adequately track changes in participation.

Estimates of participation in mountain biking are as follows:

- The 2007/08 Active New Zealand Survey estimated that 6.1% of New Zealanders (202,000 people) had participated in mountain biking (Sport and Recreation New Zealand 2009a).
- The Roy Morgan Survey found that 2.5% of New Zealanders (or 89,000 people) were regular mountain bikers in 2011 (Roy Morgan Research 2011 and unpublished data).
- In 2011/12 two percent of visitors to public conservation land indicated that mountain biking was the main activity on their most recent visit (Premium Research 2012).

Despite a widely held perception that the number of mountain bikers is increasing there is no long term data that supports this.

- Participation levels in the Active New Zealand survey have stayed at around 6% since the first survey in 1997 (Rundle 2009).
- Data has only been collected on mountain biking by Roy Morgan Research from 2009 onwards. It is estimated however, that the number of regular mountain bikers has increased 7% since 2008 (Roy Morgan Research unpublished data).

Like tramping there is agreement between the two surveys on the demographics of mountain bikers. Men make up approximately three quarters of New Zealand mountain bikers and the largest age group (38 - 41% of participants) is those aged 35-49 (Sport and Recreation New Zealand 2009b, Roy Morgan Research 2011).

Camping

Participation figures for camping are not available from either the Roy Morgan or Active New Zealand Surveys. However a survey undertaken by Mobius Research in 2006 found that 37% of New Zealanders were regular campers and 43% were non-campers (i.e. didn't camp and weren't interested). A further 20% of New Zealanders were described as latent campers. These were made up of two groups; those who were not regular campers but who had a continuing interest in camping, or those who had never camped but were interested in camping in the future (Mobius Research 2006). The high number of latent campers indicates that there is considerable scope to grow the number of campers. Unfortunately there is no data to indicate whether the number of New Zealanders who are camping is increasing or decreasing.

Information on the scale of camping on public conservation land varies. According to the National Survey of New Zealanders, out of the 56% of New Zealanders who visited public conservation land in 2011/12, 5% had gone camping on their most recent visit (Premium Research 2012). However, this statistic probably reflects the timing of the survey which was carried out in May and June. When respondents in the same survey were asked specifically about the DOC facilities they had used in the past three years, 20% said that they had stayed at a basic DOC campsite, 16% at a standard DOC campsite and 9% at a serviced DOC campsite.

Mobius Research (2006) found that there were few demographic attributes that were characteristic of regular campers. Instead they suggested that camping was an activity enjoyed by a wide cross section of New Zealanders – male and female, mixed ages and across a range of incomes.

Freshwater fishing

Freshwater fishing is a significant recreational activity carried out on public conservation land. While Fish & Game manage most freshwater fishing in the country, marginal strips and other areas of public conservation land are important for river and lake access. The Department of Conservation also directly manages the Taupō Fishery.

The Fish & Game National Angler Survey (Unwin 2009) is an additional source of participation data alongside the Roy Morgan and Active New Zealand surveys and the National Survey of New Zealanders. The surveys show that participation in freshwater fishing is static or declining.

- The National Angler Survey 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 (Unwin 2009).
- 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 2009a).
- 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).

Freshwater fishing is a male dominated activity. 72% of New Zealanders who participated regularly in 2011 were male and 28% were female. 46% were aged 50 years and over.

Hunting

Hunting appears to be one of only two major outdoor activities that is 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 2009a).
- 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 2013a).

The overwhelming majority of hunters (93.8%) are male while there is a relatively even distribution across age categories (Roy Morgan Research 2012).

How does participation in outdoor recreation in the Central North Island differ from the rest of New Zealand?

Overall participation

Residents of Tongariro Whanganui Taranaki Conservancy are significantly more likely to visit areas managed by the Department of Conservation than New Zealanders overall. In 2011/12 62.5% of conservancy residents had visited at least one DOC managed area in the previous 12 months. The figure for New Zealand overall was only 56%. This was also the highest level of participation for any North Island Conservancy (Colmar Brunton Research unpublished data).

Participation in selected recreational activities

While overall participation in outdoor recreation among local residents is high, assessing demand for individual activities at regional level is difficult. There are several reasons for this:

1. DOC and RTO boundaries do not correspond to the regions used in either the Active New Zealand Survey or the Roy Morgan Surveys.
2. There is no trend data available at regional level only one-off snapshots of participation.
3. Only the ten most popular activities in each region are listed in the Active New Zealand Survey
4. Mountain biking and freshwater fishing are not listed as a separate activities at regional level in the Active New Zealand Survey and are instead combined with other categories.
5. Information on participation levels for tramping from the two surveys is contradictory.

The graphs below show participation data from the Roy Morgan Survey for four activities: bush walking / tramping, hunting (including game shooting), mountain biking and freshwater fishing. Data is provided for five North Island regions along with data for New Zealand as a whole. The information may indicate where in the region new opportunities are more likely to be successful and can be summarised as follows.

- Tramping participation is high in the Waikato, Hawkes Bay and Taranaki (Figure 35).

- Hunting participation is high in the Bay of Plenty and Manawatu – Whanganui areas and is very low in Hawkes Bay (Figure 36).
- Participation in mountain biking is high in the Waikato, Bay of Plenty and Taranaki areas. Participation levels in the Manawatu-Whanganui region are the lowest in the country (Figure 37).
- Freshwater fishing is most popular in the Waikato, Bay of Plenty and Manawatu- Whanganui regions and is low in Taranaki (Figure 38).

Figure 35: Participation in tramping by region (Source: Roy Morgan Single Source Database 2011)

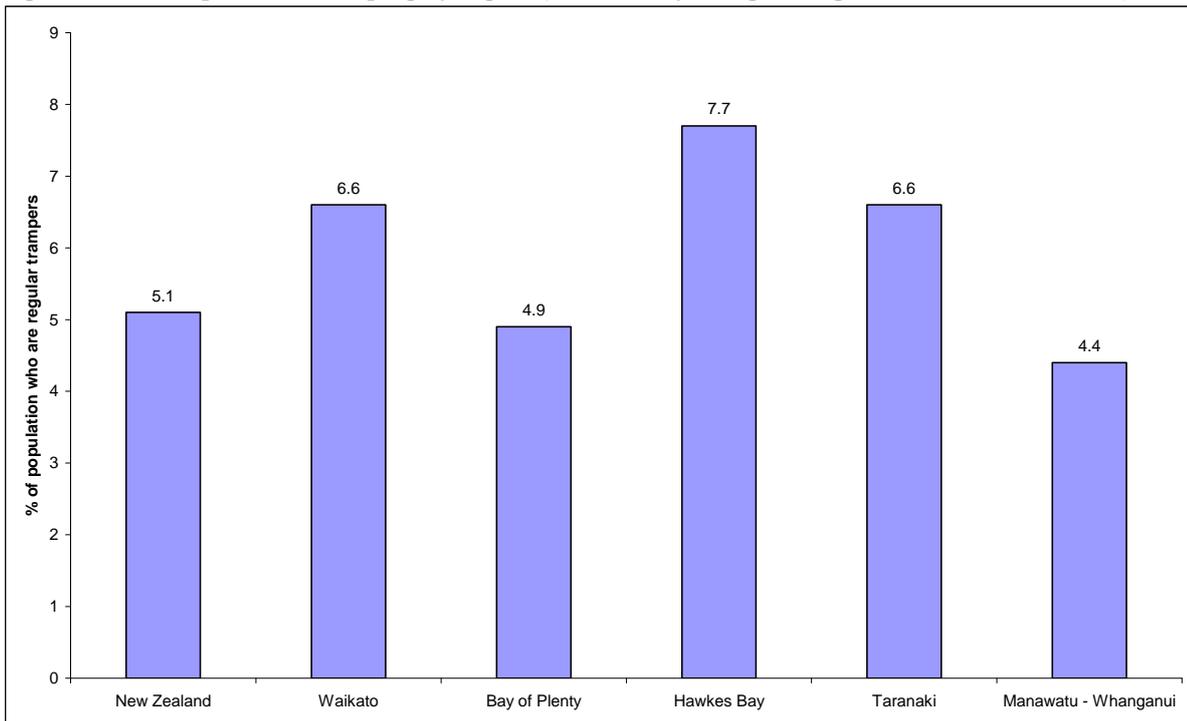


Figure 36: Participation in hunting by region (Source: Roy Morgan Single Source Database 2011)

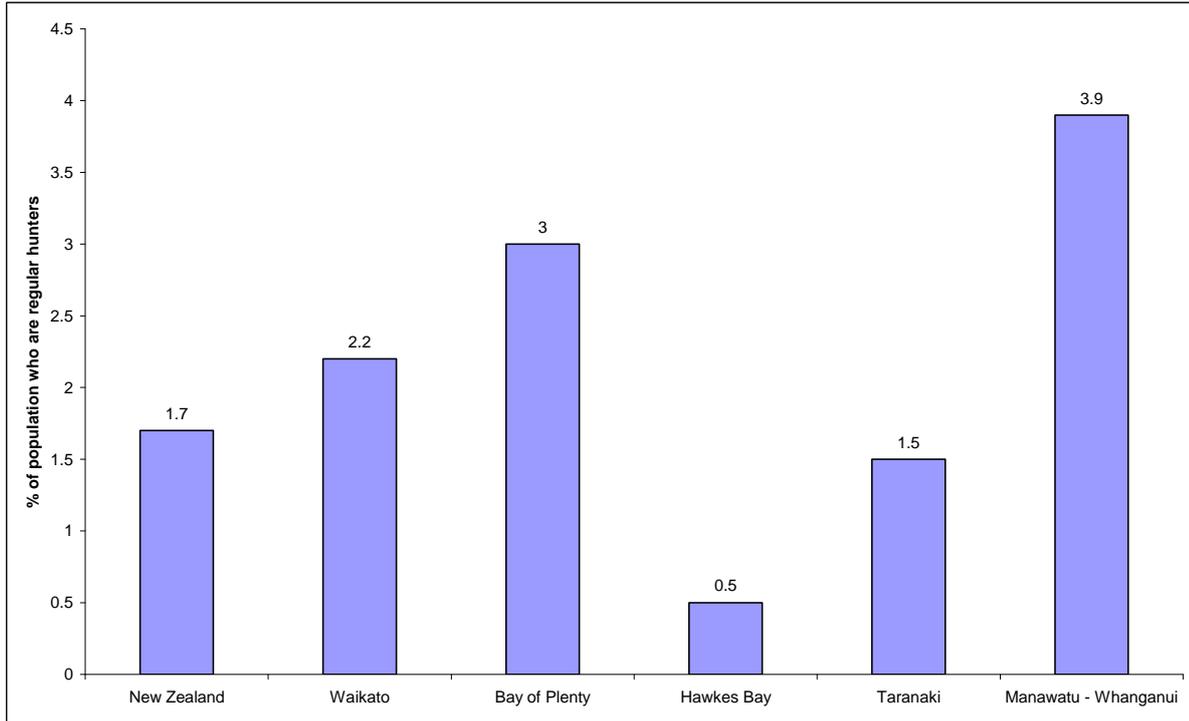


Figure 37: Participation in mountain biking by region (Source: Roy Morgan Single Source Database 2011)

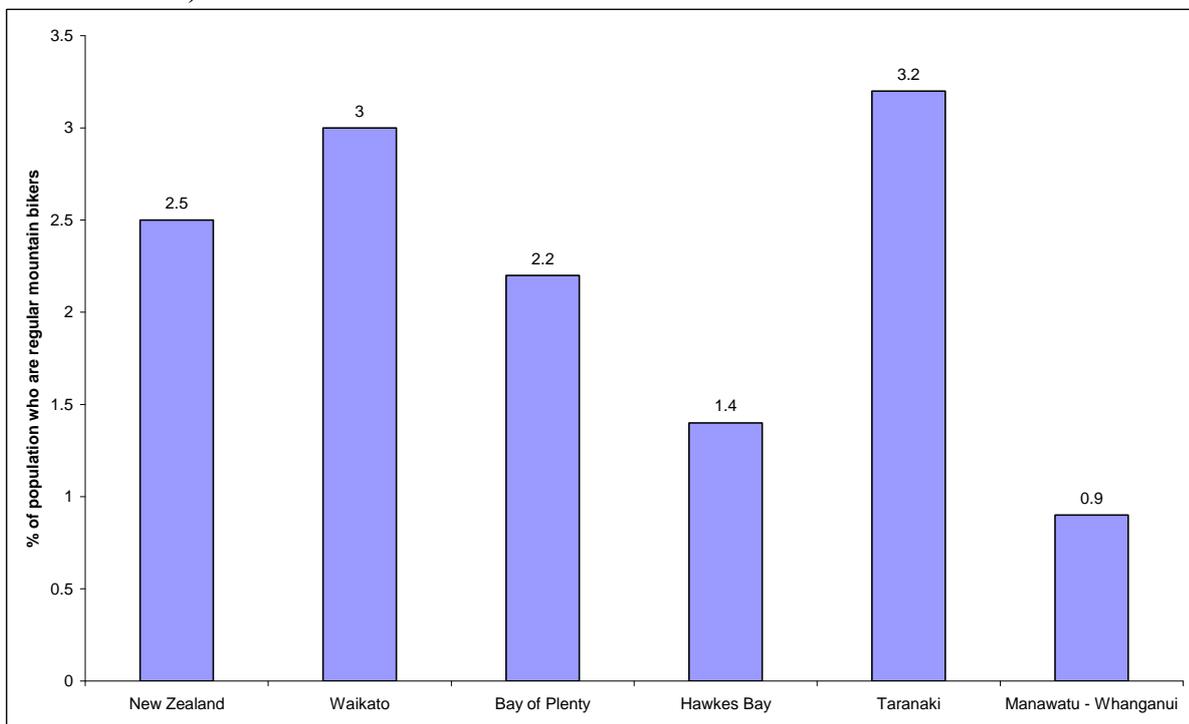
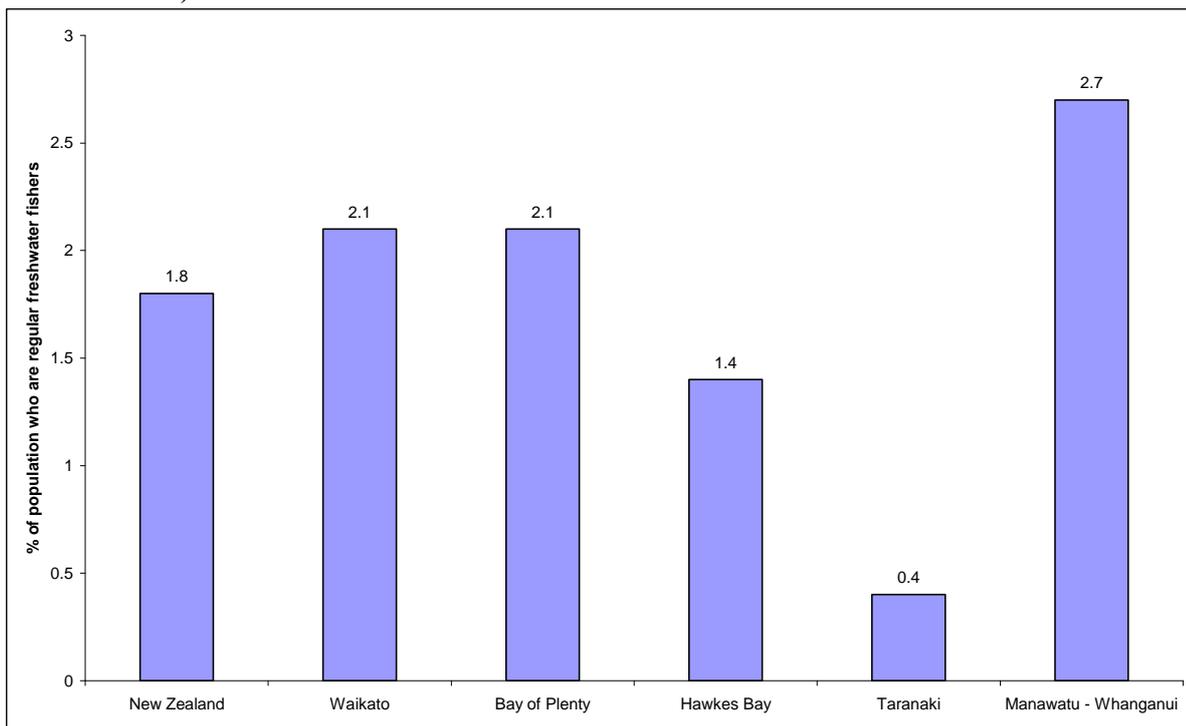


Figure 38: Participation in freshwater fishing by region (Source: Roy Morgan Single Source Database 2011)



In contrast the 2007/08 Active New Zealand survey noted higher levels of participation in tramping for most central North Island regions compared to the national figure of 9.4%.

- Bay of Plenty 10.7%
- Taranaki 10.6%
- Manawatu 11.8%
- Whanganui 11.9%

Participation was lower in Hawkes Bay at 8.2% and levels for the Waikato were not stated.

The data for tramping for both Hawkes Bay and the Bay of Plenty contradicts the information from the Roy Morgan Survey. This is likely due to a number of factors including different regional boundaries, a high margin of error for the Active New Zealand Survey at regional level, and the fact that the snapshots were taken approximately three years apart.

Demographic Trends

The final section of this report looks at national, regional and local demographic trends in New Zealand. Three key trends are likely to significantly affect demand for outdoor recreation activities in the medium to longer term nationally. These are population growth or decline in certain areas, an aging population and increasing ethnic diversity. The Department and partners will need to be mindful of these trends when planning investment for new developments and significant upgrades to existing facilities. These trends are outlined below.

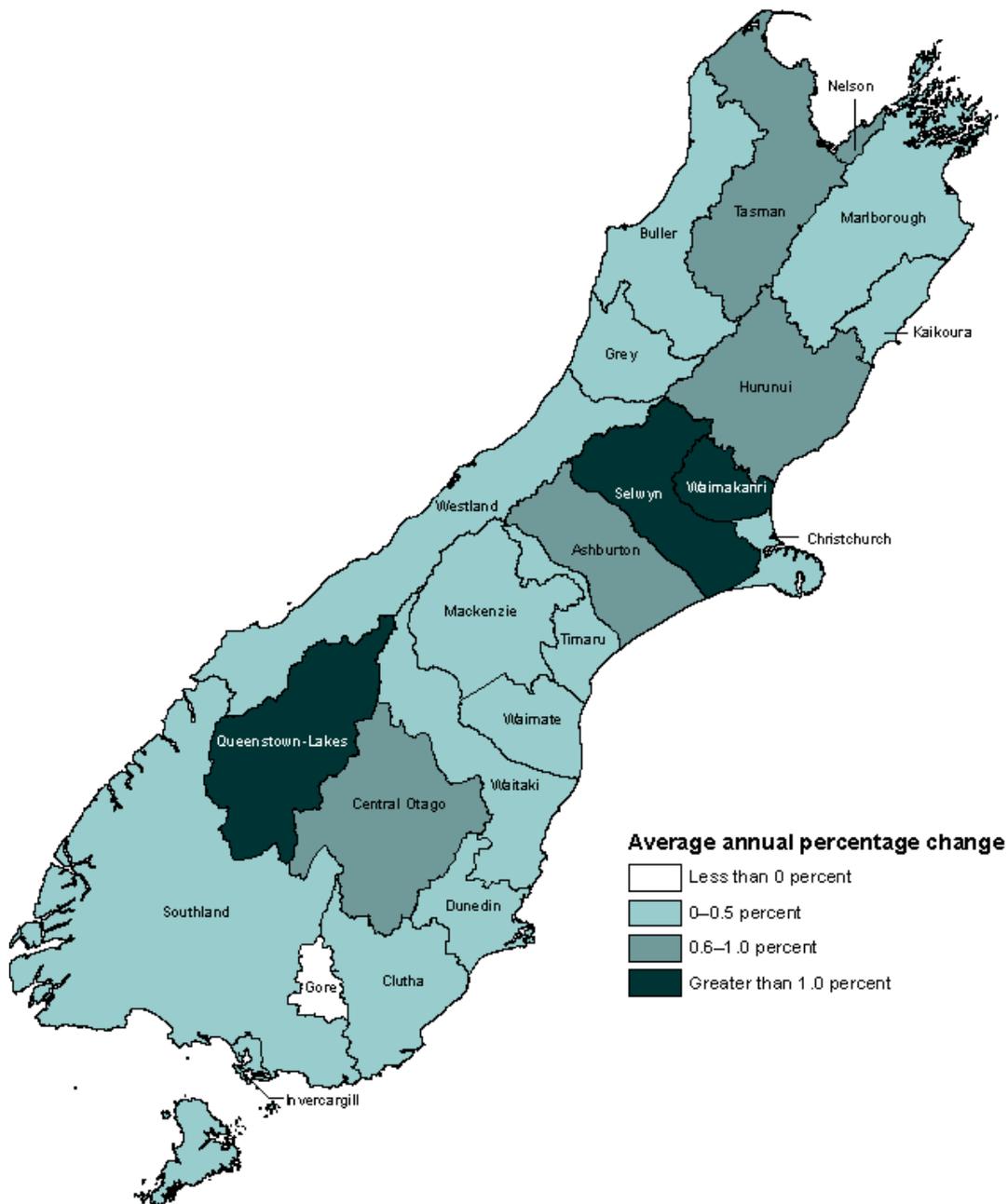
National trends

Population growth

New Zealand's population is increasing and is expected to reach 5.2 million people by 2031. The fastest growing areas nationally will be Auckland, Hamilton City, Waikato District and Tauranga in the North Island and the Selwyn, Waimakariri and Queenstown Lakes Districts in the South Island (Figure 39 & 40). It is expected that 60% of New Zealand's population growth will occur in Auckland and by 2031 the region's population will be almost 2 million. In contrast, a static or even declining population is expected in many rural areas in the central and lower North Island (Statistics New Zealand 2012a).

Population changes are likely to affect domestic tourism flows and there may also be implications for where the Department and others choose to invest in recreation opportunities for local users. Many facilities have a long economic life, which may be several decades for huts and other major structures. Future use levels should therefore be an important consideration in choosing where to invest in building or upgrading facilities for visitors.

Figure 40: Projected population change South Island Territorial Authority areas 2006 – 31 (Source: Statistics New Zealand medium projection)



Aging population

Like many western countries, New Zealand has an aging population. Overall, 21 percent of New Zealand’s population is projected to be aged 65 years and over in 2031, up from 14 percent in 2012 (Statistics New Zealand 2012a). In addition to this, fifty of New Zealand’s 67 territorial authority areas are predicted to have fewer children in 2031 than they did in 2011 (Statistics New Zealand 2012a). This is due to their being fewer women of child bearing age and lower fertility rates in these areas.

These patterns have implications for the mix of opportunities that the Department and others provide. An aging population may not necessarily result in significantly reduced participation as New Zealanders are likely to stay active and healthy later in life than those of previous generations. Furthermore, for those currently aged 55+, participation in recreation on public conservation land is still relatively high. According to the 2011/12 National Survey of New Zealanders, 50.9% of New Zealanders in this age group had visited at least one DOC managed area in the preceding 12 months. This was only slightly below the percentage for the most active age group, those aged 40-54 (Colmar Brunton Research unpublished data). Instead, older New Zealanders may use the outdoors differently and this may translate into demand for different opportunities to what is provided at.

Figure 41: (Source: Statistics New Zealand)

New Zealand

Age structure in 2011

Estimated resident population

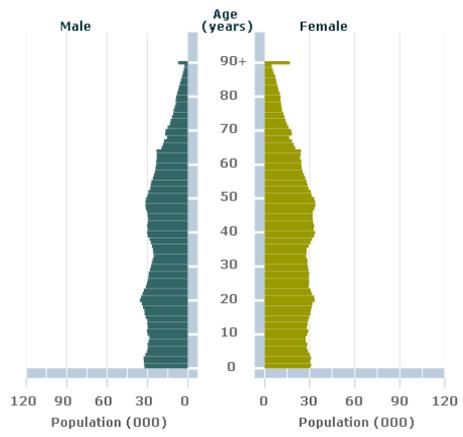
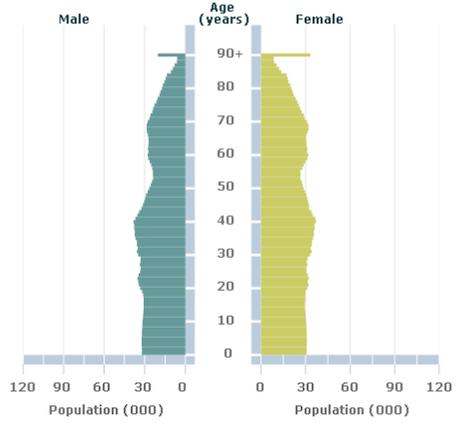


Figure 42: (Source Statistics New Zealand median projection)

New Zealand

Age structure in 2031

Projected resident population



The Department is currently shifting to have more of a focus on family friendly gateway opportunities and projections of fewer children in some areas, is a challenge to this. However this direction is worth pursuing as getting more young people into the outdoors has potential benefits in terms of life long participation and support for conservation. The projections make it clear however, that the Department needs to be careful to provide family friendly opportunities in parts of the country where they are most likely to be successful.

Changing ethnic mix

New Zealand's population is expected to become more ethnically diverse as the Maori, Pacific Island and Asian populations grow at a much faster rate than the European population. In particular, New Zealand's Asian population is expected to almost double between 2006 and 2021 (Statistics New Zealand 2010).

This has implications for the Department of Conservation as the fastest growing ethnic groups are also those that are less likely to visit public conservation land. Participation is lowest among New Zealanders of Pacific Island ethnicity. The 2011/12 National Survey of New Zealanders found that only 34.3% of those of Pacific ethnicity had visited a DOC managed area in the preceding 12 months. This compares to 47.3% of Asian New Zealanders, 53.5% of Maori and 57.9% of those who identified as NZ European / Pakeha (Colmar Brunton Research unpublished data).

Figure 43: Projected growth in New Zealand's population by ethnic group (Source: Statistics New Zealand, National Ethnic Population Projection Series 6)

Ethnic group	Estimated population 2006	Projected population 2026	Projected growth rate 2006 - 2026
European or other	3,213,000	3,472,000	+8.1%
Māori	624,000	811,000	+30.0%
Asian	404,000	791,000	+95.8%
Pacific	302,000	481,000	+59.3%

The changing ethnic mix in New Zealand challenges the Department to promote its existing opportunities better and also to provide opportunities that are of interest and relevant to a range of people who are not participating at present.

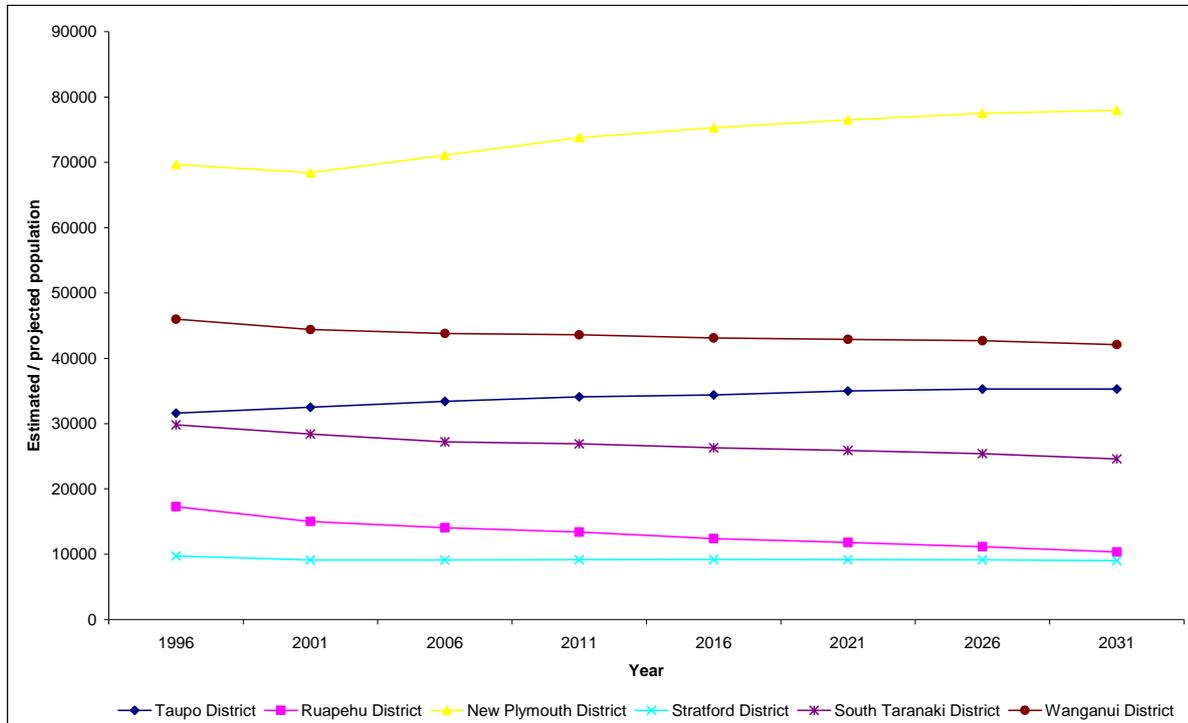
Demographic changes in the Tongariro Whanganui Taranaki region

Projected population changes for the six Territorial Local Authorities in the region (Taupō, Ruapehu, New Plymouth, Stratford, South Taranaki and Whanganui Districts), are as follows (Figure 44):

- The population of the Ruapehu District is projected to decline significantly by 22.8% between 2011 and 2031.
- Smaller rates of decrease are projected for the South Taranaki (-8.6%), Whanganui (-3.4%) and Stratford Districts (-1.7%).
- The populations of the New Plymouth and Taupō Districts are projected to increase by 5.7% and 3.5% respectively.

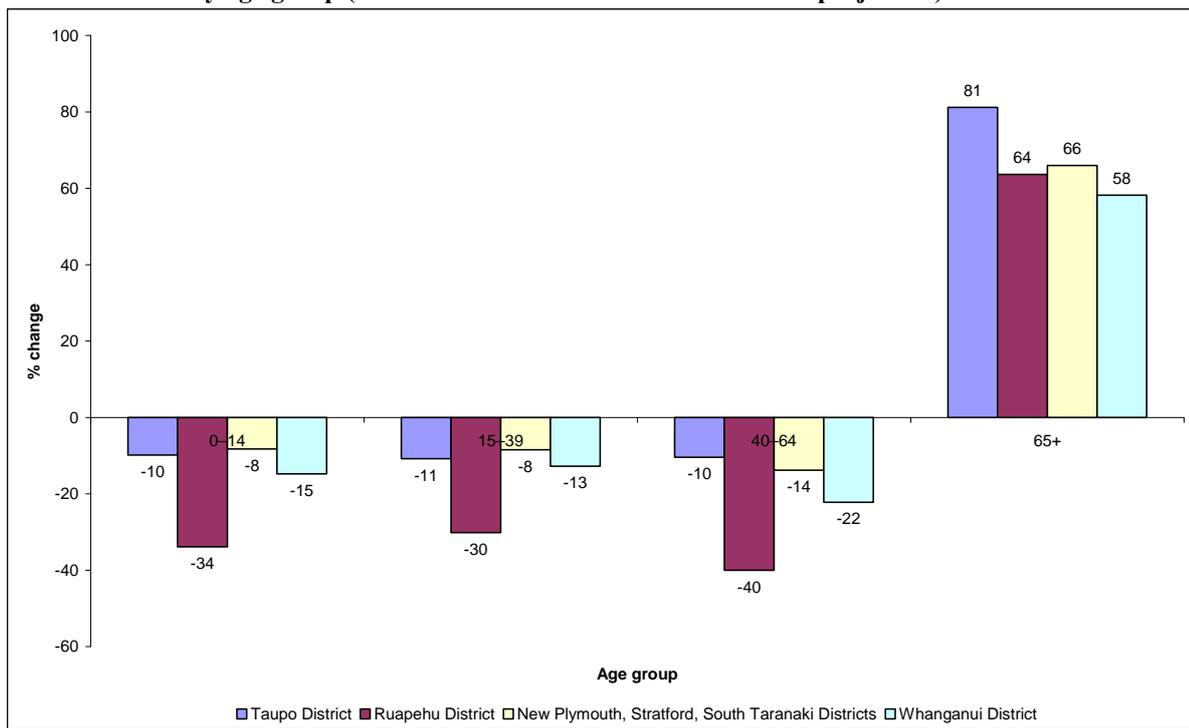
- The population of the Tongariro Whanganui Taranaki region as a whole will be relatively static. It is projected to decline by 0.8% from 200,980 in 2011 to 199,370 in 2031 (Statistics New Zealand 2012b).

Figure 44: Projected population change in the Tongariro Whanganui Taranaki region 1996 – 2031
(source: Statistics New Zealand medium projection)



All areas of the Tongariro Whanganui Taranaki region show a similar trend with respect to changes in age structure over the next 20 years. The number of people aged 65 years and over is expected to increase by between 58 and 81% across the region (Figure 45) compared to a national increase of 88%. In contrast to national projections the number of residents across all other age groups is projected to decline. Nationally under 15s are projected to increase by 4.5%, the 15-39 age group by 11.4% and the 40-64 age group by 4.1% (Statistics New Zealand 2012b).

Figure 45: Percentage change in resident population of Tongariro Whanganui Taranaki region 2011 – 2031 by age group (Source: Statistics New Zealand medium projection)



Complete information on projected numbers for different ethnic groups was not available for the various local council areas in the Tongariro Whanganui Taranaki region.

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Appendix 1: Popular DOC managed areas

The following tables list the areas of public conservation land that were visited by the largest number of New Zealanders and Tongariro Whanganui Taranaki residents in 2011/12. Data has been sourced from the National Survey of New Zealanders (Premium Research 2012).

Figure 46: Top ten DOC areas visited by New Zealanders in 2011/12

Rank	Location
1	Tongariro National Park
2	Karangahake Gorge
3	North Head, Auckland
4	Arthurs Pass National Park
5	Coromandel Forest Park
6	Rangitoto Island
7	Hanmer Forest Park
8	Fiordland National Park
9	Egmont National Park
10	Abel Tasman National Park

Figure 47: Top ten DOC areas visited by Tongariro Whanganui Taranaki residents in 2011/12

Rank	Location
1	Egmont National Park
2	Tongariro National Park
3	Whanganui National Park
4	Dawson Falls Power Station
5	North Egmont Camphouse
6	Tongariro River Walks
7	Coromandel Forest Park
8	Kaimanawa Forest Park
9	Tongariro National Trout Centre
10	Bridge to Nowhere

Appendix 2: Site monitoring reports

The following reports produced in the last 10 years were identified as being relevant to the Regional Tourism Opportunities Report for Tongariro Whanganui Taranaki Conservancy. These can be supplied on request

Region	Site	Details
Taupō	Taupō Fishery	Exploring future opportunities for the Taupō Fishery. Online visitor survey and economic impact analysis .
Taranaki	Lucy's Gully	Survey of 211 visitors at Lucy's Gully carried out during the 2005/06 and 2006/07 seasons (Department of Conservation unpublished data).
Ruapehu	Tongariro Alpine Crossing	Blaschke, P. & Whitney, P. (2007). <i>Establishing integrative use limits on the Tongariro Crossing, Tongariro National Park.</i> http://www.tba.co.nz/kete/case_studies/pdf/tongariro_crossing_case_study.pdf Angus & Associates (2012). <i>Tongariro Alpine Crossing visitor survey 2012.</i> Unpublished report prepared for Department of Conservation by Angus & Associates.
Whanganui	Pouakai Circuit	Survey of 149 users of the Pouakai Circuit Track carried out during the 2007/08 season (Rundle 2010).
	Whanganui River Journey	Survey of 276 users of the Whanganui River Journey carried out during the 2007/08 season (Rundle 2008).

