

ANALYSING ACTIVITY AND ATTRACTION USE BY INTERNATIONAL VISITORS TO NEW ZEALAND 2003-2007

1 Introduction

The Ministry of Tourism released on 17 September 2008 activity and attraction use from the International Visitor Survey data for 2007 together with data for the years 2003 to 2006. This report analyses the activities and attractions data for the five years and makes recommendations concerning the presentation of the data, as well as discussing what the data means for tourism businesses.

2 Overview

The data for activities and attractions uses 66 separate categories. Currently there is no separation or explanation of what constitutes an activity or attraction and this reduces the usefulness of the valuable data for potential users. The top 10 (most popular) activities and attractions over the period 2003 to 2007 are detailed in Table 2.1. A list of results for all activities and attractions is detailed in Appendix 1.

Activity or Attraction	2003	2004	2005	2006	2007	Rank
Dining	1,253,419	1,472,128	1,535,171	1,518,613	1,671,536	1
Shopping	1,141,010	1,404,978	1,415,331	1,478,075	1,534,623	2
Walking/trekking	1,143,773	1,288,656	1,500,260	1,443,399	1,504,966	3
Sightseeing (land)	1,265,822	1,483,825	1,469,779	1,450,129	1,273,991	4
Other scenic/natural attractions	858,448	972,867	1,090,927	1,091,056	1,231,292	5
Boating	579,147	720,066	720,302	689,103	698,380	6
Museums/galleries	529,639	617,356	690,261	674,316	671,281	7
Gardens	333,308	442,706	499,364	560,121	621,341	8
Lookout and viewing platforms	419,878	470,181	520,122	613,785	610,370	9
Heritage attractions	289,311	375,445	378,339	450,795	578,520	10
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988	

Note: Summing the individual activities is more than the total visitors because of multiple visits. Ranking is based on 2007 data

As Table 2.1 shows Dining and Shopping are the two most popular activities closely followed by walking/trekking. While dining and shopping are easily understood, walking and trekking is less so as it could include everything from a short bush walk to a three or four day tramp. The fact that 67% of visitors in 2007 either undertook a walk or trek clearly indicates the popularity of this type of visitor experience.

In order to understand whether more people are undertaking these activities and attractions when in New Zealand we need to determine both the percentage of total visitors who are undertaking the activity/attraction and also the annual growth. Table 2.2 shows the increase in visitors to the

activities/attractions as a percentage of the total visitors to New Zealand from 2003 to 2007 for the top ten activities/attractions.

Table 2.2: Growth in Top Ten Activities/Attractions for International Visitors as a Percentage of Total Visitors 2003 - 2007					
Activity or Attraction	2003		2007		Rank
	Visitors	% of Total Visitors	Visitors	% of Total Visitors	
Gardens	333,308	17	621,341	28	1=
Heritage attractions	289,311	15	578,520	26	1=
Other scenic/natural attractions	858,448	45	1,231,292	55	3
Dining	1,253,419	66	1,671,536	75	4
Shopping	1,141,010	60	1,534,623	68	5
Walking/trekking	1,143,773	60	1,504,966	67	6
Lookout and viewing platforms	419,878	22	610,370	28	7
Museums/galleries	529,639	28	671,281	30	8
Boating	579,147	30	698,380	31	9
Sightseeing (land)	1,265,822	66	1,273,991	57	10
Total International Visitors to New Zealand	1,908,867		2,243,988		

Note: Summing the individual activities is more than the total visitors because of multiple visits. Ranking is based on change in percentage from 2003 to 2007.

The biggest change in activities/attractions over the period is for visitors to gardens and heritage attractions. The percentage of visitors to gardens increased from 17% to 28% and for heritage attractions from 15% to 26%.

Table 2.3 looks at the growth in visitors to activities/attractions over the period 2003 to 2007 and determines which have increased the most.

Table 2.3: Growth in Visitors to Top Ten Activities/Attractions for International Visitors 2003 - 2007					
Activity or Attraction	2003	2007	Growth		Rank
	Visitors	Visitors	Visitors	%	
Heritage attractions	289,311	578,520	289,209	100	1
Gardens	333,308	621,341	288,033	86	2
Lookout and viewing platforms	419,878	610,370	190,492	45	3
Other scenic/natural attractions	858,448	1,231,292	372,844	43	4
Shopping	1,141,010	1,534,623	393,613	34	5
Dining	1,253,419	1,671,536	418,117	33	6
Walking/trekking	1,143,773	1,504,966	361,193	32	7
Museums/galleries	529,639	671,281	141,642	27	8
Boating	579,147	698,380	119,233	21	9
Sightseeing (land)	1,265,822	1,273,991	8,169	1	10
Total International Visitors to New Zealand	1,908,867	2,243,988			

Note: Summing the individual activities is more than the total visitors because of multiple visits.

Ranking is based on the percentage increase from 2003 to 2007.

The major growth from a numerical perspective has been in the dining, shopping and walking categories. However, in terms of percentage growth visitors to heritage attractions (100%), gardens (86%), and lookout and viewing platforms (45%) have been very significant. This may well link to the ‘aging’ of the international visitor market previously identified by the Ministry of Tourism from data collected for the period 2004 to 2008. This data indicated that the ‘baby boomer’ market was growing and although many of these visitors are very active, it is likely that visits to gardens and heritage attractions would be high on their ‘must see’ list.

The additional analysis of the existing data detailed in the tables above, provides a more comprehensive look at the current data and enables extended analysis and understanding. While there is no surprise to the number of visitors undertaking dining and shopping, users of the data may be surprised by the significant growth in visits to gardens and heritage attractions, at the same time boating and sightseeing have grown much more slowly. Taken at face value it would appear that gardens and heritage attractions could achieve increased visitors for existing attractions and potentially provide opportunities for new ones.

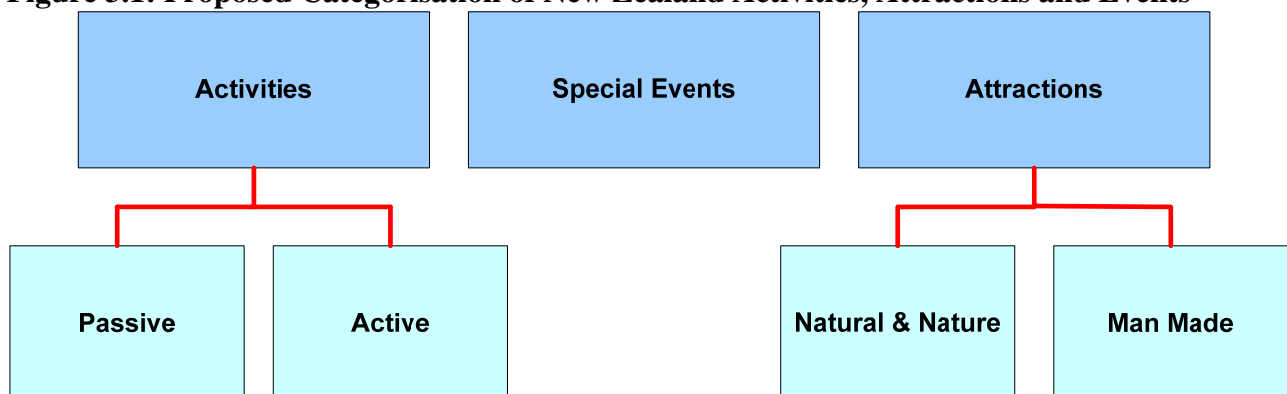
3 Activity and Attraction Data Presentation Review

As the saying goes “There’s more than one way to skin a cat” and this section looks at how the data on activities and attractions could be presented in a more meaningful way and enhance understanding and decision making for tourism businesses.

As indicated previously New Zealand combines activities and attractions into one group with 66 sub groups. This approach fails to recognise the very significant differences between the sectors from an investment, market, operational and financial perspective. Is it the right approach to lump all our activities and attractions together within the one category? What would be the benefits if we had a more comprehensive approach to the collection and presentation of this data?

Figure 3.1 proposes a categorisation of activities, attractions and events that fits the New Zealand situation.

Figure 3.1: Proposed Categorisation of New Zealand Activities, Attractions and Events



How would this categorisation fit with the current data for activities and attractions produced by the Ministry of Tourism from the International Visitor Survey data? The tables below have taken the current data and applied the above categorisation to illustrate how it could be presented.

This sector focuses on visitors to Passive Activities.

Table 3.1: International Visitor Survey – Number of Visitors Sampling Activities (Passive) 2003 – 2007					
Activities - Passive	2003	2004	2005	2006	2007
Dining	1,253,419	1,472,128	1,535,171	1,518,613	1,671,536
Shopping	1,141,010	1,404,978	1,415,331	1,478,075	1,534,623
Sightseeing (Land)	1,265,822	1,483,825	1,469,779	1,450,129	1,273,991
Visiting Friends and Relatives	685,999	885,170	940,798	925,771	1,038,933
Lookouts and Viewing Platforms	419,878	470,181	520,122	613,785	610,370
Business	245,642	268,030	302,179	290,012	315,550
Sightseeing (Air)	70,674	113,265	123,920	132,050	124,491
Arts and Crafts	76,744	138,122	112,280	86,958	77,041
Education/Study/ Language School	69,991	67,288	71,451	68,881	71,265
Working Holiday	23,356	34,004	32,896	47,718	38,893
Medical Visit	22,364	33,930	22,380	21,667	24,096
Other Business/Eductnl Activities	36,264	46,719	9,279	4,396	10,803
Total Visitors	5,324,072	6,430,355	6,531,969	6,594,733	6,763,501
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

This sector incorporates all the activities that could be considered non recreational using a definition by Collier which suggests recreational activities tend to be more active as Table 3.2 will indicate.

This sector incorporates almost twice as many visitors as any other of the four with dining, shopping, sightseeing and visiting friends and relatives accounting for 82% of all activities (passive) in 2007.

Using the 2003 and 2007 figures as the base data, dining (418,117), shopping (393,614) and visiting friends and relatives (352,934) had the largest growth in numerical terms, while sightseeing – air (76%), visiting friends and relatives (51%) and look outs and viewing platforms (45%) were the fastest growing in percentage terms.

Table 3.2 focuses on visitors to Active Activities.

Table 3.2: International Visitor Survey – Number of Visitors Sampling Activities (Active) 2003 – 2007					
Activities - Active	2003	2004	2005	2006	2007
Walking and Trekking	1,143,773	1,288,656	1,500,260	1,443,399	1,504,966
Canoeing, Kayaking, Rafting	160,682	143,517	185,628	155,601	153,166
Fishing	117,125	98,416	110,725	118,719	120,483
Bungy Jumping	111,631	100,064	105,470	112,381	107,871
Snow Sports	108,265	94,710	107,824	105,924	107,689
Swimming	138,919	150,394	156,564	132,598	104,592
Other Water Activities	74,872	75,937	80,252	65,546	82,405
Golf	73,106	79,310	73,862	69,472	63,901
Caving	78,221	65,257	85,556	85,034	59,199
Sky Diving/Parachuting	65,963	60,623	81,302	70,540	57,687
Cycle Sports	65,868	58,766	59,438	54,137	55,025
Horse Trekking/Riding	52,466	60,786	55,508	40,674	45,725
Paraponting	4,071	11,056	19,146	13,987	13,846
Hunting/Shooting	13,039	10,934	14,793	15,218	10,462
Ballooning	9,333	5,746	2,993	3,202	8,397
Gliding	59,388	37,140	8,007	4,576	2,219
Climbing	55,677	25,079	0	0	0
Total Visitors	2,355,754	2,400,394	2,680,224	2,538,726	2,536,525
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

This sector includes what most people would refer to as the active pursuits. Collier includes many of these in what he terms “Recreational Activities”.

Many of these activities have decreased in popularity over the five year period with only walking and trekking showing any significant increase (31%). The decline in many of the activities could be for a number of reasons including an aging market and therefore many of the activities having reduced visitor appeal.

Table 3.3 focuses on visitors to the Natural and Nature Attractions sector.

Table 3.3: International Visitor Survey – Number of Visitors Sampling Attractions (Natural & Nature) 2003 – 2007					
Natural & Nature Attractions	2003	2004	2005	2006	2007
Other Scenic/Natural Attractions	858,448	972,867	1,090,927	1,091,056	1,231,292
Volcanic/Geothermal Attractions	532,202	662,466	797,614	701,730	700,395
Fiordland National Park	0	54,846	107,636	96,042	163,773
Bird Watching	148,702	174,974	130,653	166,290	160,077
Other Wildlife Encounters	183,075	219,424	112,484	131,346	130,619
Dolphin Watching	115,968	115,669	106,338	98,777	111,420
Whale Watching	86,709	87,851	103,431	91,454	98,110
South Island National Parks	0	46,363	120,546	86,763	86,350
North Island National Parks	0	13,463	38,130	37,439	35,867
Total Visitors	1,925,104	2,347,922	2,607,758	2,500,897	2,717,903
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

This sector has seen significant growth for almost all categories. Visitors to Fiordland National Park increased by almost 200% between 2004 and 2007 (no data for 2003) and South Island National Parks increased 86% and North Island 166%. Nature based attractions increased at a slower rate than the natural attractions with other wildlife encounters showing a major decline (29%) and dolphin watching visitors showing a small decline (4%).

Table 3.4 focuses on visitors to Man Made attractions.

Table 3.4: International Visitor Survey – Number of Visitors Sampling Attractions (Man Made) 2003 – 2007					
Man-Made Attractions	2003	2004	2005	2006	2007
Boating	579,147	720,066	720,302	689,103	698,380
Museums and Galleries	529,639	617,356	690,261	674,316	671,281
Gardens	333,308	442,706	499,364	560,121	621,341
Heritage Attractions	289,311	375,445	378,339	450,795	578,520
Entertainment	518,681	530,110	526,330	498,642	483,416
Cultural Attractions	359,996	423,131	471,846	449,083	421,992
Farms	231,496	273,401	281,092	247,561	244,500
Zoos/Wildlife/Marine Parks	140,410	226,017	342,378	257,548	227,561
Wineries	126,876	161,609	157,337	183,193	193,045
Other Attractions	109,516	138,312	140,862	132,911	160,821
Theme and Leisure Parks	119,669	118,060	103,348	129,902	114,762
Casinos	147,594	143,256	132,914	134,991	101,267
Total Visitors	2,906,496	3,449,404	3,724,070	3,719,063	3,818,506
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

This group covers all the man-made attractions which are generally referred to as visitor attractions and provide a major proportion of the visitor experience for international visitors.

All the categories have shown growth except for casinos and entertainment which have both declined in popularity with international visitors over the period. A 100% increase in visitors to heritage attractions and an 86% increase in visitors to garden is a large increase for attractions that in 2003 already attracted over 289,000 and 333,000 visitors respectively.

Table 3.5 focuses on visitors to Special Events.

Table 3.5: International Visitor Survey – Number of Visitors Sampling Special Events 2003 – 2007					
Special Events	2003	2004	2005	2006	2007
Major Art/Culture Event	0	19,244	82,670	104,831	129,603
Convention/Conference	0	41,940	61,521	71,433	68,939
Motor Sports	16,369	43,026	45,876	41,399	39,539
Performing Arts	51,851	61,345	57,493	44,244	35,201
Other Major Events	92,594	11,421	28,717	32,201	23,855
Sporting Event	0	5,504	29,474	27,628	21,577
Food and Wine Festival	0	5,257	12,775	6,471	8,089
Garden/Floral Show	0	3,146	15,610	3,398	2,504
Total Visitors	160,815	190,882	334,136	331,606	329,308
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

With events becoming an increasingly important part of the visitor mix, having a separate sector for special events is important.

Total numbers of international visitors attending events is still relatively small in comparison to the other sectors. There has however been more than 100% growth over the period with visitors to art/culture events increasing by a staggering 573%.

Table 3.6 summarises the visits to all Activities and Attractions including Special Events.

Table 3.6: International Visitor Survey – Number of Visitors Sampling Activities, Attractions & Special Events 2003 – 2007					
Sectors	2003	2004	2005	2006	2007
Activities- passive	5,324,072	6,430,355	6,531,969	6,594,733	6,763,501
Attractions - man made	2,906,496	3,449,404	3,724,070	3,719,063	3,818,506
Attractions – natural & nature	1,925,104	2,347,922	2,607,758	2,500,897	2,717,903
Activities - active	2,355,754	2,400,394	2,680,224	2,538,726	2,536,525
Special events	160,815	190,882	334,136	331,606	329,308
Total International Visitors to New Zealand	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

This section enables a comparison of the five key sectors for activities, attractions and events.

There has been growth in all sectors but with some achieving substantially higher growth rates than others as Table 3.7 indicates.

Sectors	2003	2007	Growth		Rank
			Visitors	%	
Special events	160,815	329,308	168,493	105	1
Attractions – natural & nature	1,925,104	2,717,903	792,799	41	2
Attractions - man made	2,906,496	3,818,506	912,010	31	3
Activities- passive	5,324,072	6,763,501	1,439,429	27	4
Activities - active	2,355,754	2,536,525	180,771	8	5
Total International Visitors to New Zealand	1,908,867	2,150,102			

Note: Summing the individual activities will be either more or less than the total visitors to New Zealand because of multiple visits and the number of visitors to the sector.

Ranking is based on the percentage increase from 2003 to 2007.

- The number of visitors engaged in passive activities was more than 58% higher than any other sector in 2007.
- Visitors engaged in active activities have seen the lowest growth rate over the period which is probably reflective of a change in the international visitor market mix.
- Visitors to natural & nature attractions have the second highest growth rate.
- Man made attractions are the second largest sector and also show the third highest growth rate.
- Visitors to special events comprise a small percentage of total visitors but show the highest growth rate.

Table 3.8 highlights the change in international visitor preferences over the period. The table identifies how many visitors on average participated in activities within specific sectors for 2003 and 2007 years. The difference indicates the change in popularity of the sector.

Sectors	2003		2007	
	No of Visitors	Avg No of Visits per Visitor	No of Visitors	Avg No of Visits per Visitor
Activities- passive	5,324,072	2.79	6,763,501	3.01
Activities - active	2,355,754	1.23	2,536,525	1.13
Attractions – natural & nature	1,925,104	1.01	2,717,903	1.21
Attractions - man made	2,906,496	1.52	3,818,506	1.70
Special events	160,815	0.08	329,308	0.15
Total International Visitors to New Zealand	1,908,867		2,243,988	

The table shows that all sectors except Active Activities are receiving more visitors as a proportion of the total number of international visitors to New Zealand in 2007 than they were in 2003. It would seem that there is a growing interest in the other sectors. It probably confirms the trend towards an aging visitor market with the traditional adventure activities becoming less attractive.

4 Benefits of the New Approach to Researchers and Businesses

There are a number of obvious benefits to the presentation of results as detailed in section 3.

- 1) It separates out the different sub sectors that make up the current activities and attractions sector. This enables readers to be aware of the total size of each sector, as well as the individual activity and attraction types within each sector.
- 2) It identifies visitor number and growth trends within each sector and for each activity and attraction type. This will be useful to existing and new businesses.
- 3) It identifies which sectors and activity and attraction types are growing the fastest and which offer opportunities for enhancement of existing and investment in new businesses.
- 4) Overall it provides a much more comprehensive analysis of the activity and attraction sectors by international visitors

5 Conclusions

This review of the activities and attractions research data obtained from the International Visitor Survey has endeavoured to provide an enhanced analysis of the existing data. At the same time it has suggested that the analysis of the data could be further improved if they were presented in five sectors that incorporate similar activities and attractions including special events. For those businesses involved in the specific sectors or the individual activities and attractions it would provide valuable information on trends that could be used to make informed decisions on future business developments. The proposed structure could also be used with data on activities and attractions from the Domestic Tourism Survey.

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6 Appendix 1 – International Visitor Survey

Sum of Visitors Activity or Attraction	Trip Year				
	2003	2004	2005	2006	2007
Arts And Crafts	76,744	138,122	112,280	86,958	77,041
Ballooning	9,333	5,746	2,993	3,202	8,397
Bird Watching	148,702	174,974	130,653	166,290	160,077
Boating	579,147	720,066	720,302	689,103	698,380
Bungy Jumping	111,631	100,064	105,470	112,381	107,871
Business	245,642	268,030	302,179	290,012	315,550
Canoeing, Kayaking, Rafting	160,682	143,517	185,628	155,601	153,166
Casinos	147,594	143,256	132,914	134,991	101,267
Caving	78,221	65,257	85,556	85,034	59,199
Climbing	55,677	25,079	0	0	0
Convention/Conference	0	41,940	61,521	71,433	68,939
Cultural Attractions	359,996	423,131	471,846	449,083	421,992
Cycle Sports	65,868	58,766	59,438	54,137	55,025
Dining	1,253,419	1,472,128	1,535,171	1,518,613	1,671,536
Dolphin Watching	115,968	115,669	106,338	98,777	111,420
Education/Study/Language School	69,991	67,288	71,451	68,881	71,265
Entertainment	518,681	530,110	526,330	498,642	483,416
Farms	231,496	273,401	281,092	247,561	244,500
Fiordland National Park	0	54,846	107,636	96,042	163,773
Fishing	117,125	98,416	110,725	118,719	120,483
Food And Wine Festival	0	5,257	12,775	6,471	8,089
Garden/Floral Show	0	3,146	15,610	3,398	2,504
Gardens	333,308	442,706	499,364	560,121	621,341
Gliding	59,388	37,140	8,007	4,576	2,219
Golf	73,106	79,310	73,862	69,472	63,901
Heritage Attractions	289,311	375,445	378,339	450,795	578,520
Horse Trekking/Riding	52,466	60,786	55,508	40,674	45,725
Hunting/Shooting	13,039	10,934	14,793	15,218	10,462
Lookouts And Viewing Platforms	419,878	470,181	520,122	613,785	610,370
Major Art/Culture Event	0	19,244	82,670	104,831	129,603
Medical Visit	22,364	33,930	22,380	21,667	24,096
Motor Sports	16,369	43,026	45,876	41,399	39,539
Museums And Galleries	529,639	617,356	690,261	674,316	671,281
None / Nothing	386,682	502,853	533,781	503,507	458,416
Nth Is National Parks	0	13,463	38,130	37,439	35,867
Other Activities	349,692	210,421	92,297	114,215	121,677
Other Air Activities	0	1,633	3,964	3,793	401
Other Arts & Culture Activities	0	4,741	13,368	23,293	24,791
Other Attractions	109,516	138,312	140,862	132,911	160,821
Other Business/Edctnl Activities	36,264	46,719	9,279	4,396	10,803
Other Land Activities	121,630	115,146	176,374	170,610	180,715
Other Major Events	92,594	11,421	28,717	32,201	23,855
Other Scenic/Natural Attractions	858,448	972,867	1,090,927	1,091,056	1,231,292
Other Sports	103,271	114,956	161,219	110,251	102,509
Other Water Activities	74,872	75,937	80,252	65,546	82,405
Other Wildlife Encounters	183,075	219,424	112,484	131,346	130,619
Paraponting	4,071	11,056	19,146	13,987	13,846
Performing Arts	51,851	61,345	57,493	44,244	35,201
Shopping	1,141,010	1,404,978	1,415,331	1,478,075	1,534,623
Sightseeing (Air)	70,674	113,265	123,920	132,050	124,491

Sum of Visitors	Trip Year				
Activity or Attraction	2003	2004	2005	2006	2007
Sightseeing (Land)	1,265,822	1,483,825	1,469,779	1,450,129	1,273,991
Sky Diving/Parachuting	65,963	60,623	81,302	70,540	57,687
Snow Sports	108,265	94,710	107,824	105,924	107,689
Sporting Event	0	5,504	29,474	27,628	21,577
Sth Is National Parks	0	46,363	120,546	86,763	86,350
Swimming	138,919	150,394	156,564	132,598	104,592
Theme And Leisure Parks	119,669	118,060	103,348	129,902	114,762
Visiting Friends And Relatives	685,999	885,170	940,798	925,771	1,038,933
Volcanic/Geothermal Attractions	532,202	662,466	797,614	701,730	700,395
Walking And Trekking	1,143,773	1,288,656	1,500,260	1,443,399	1,504,966
Whale Watching	86,709	87,851	103,431	91,454	98,110
Wineries	126,876	161,609	157,337	183,193	193,045
Working Holiday	23,356	34,004	32,896	47,718	38,893
Zoos/Wildlife/Marine Parks	140,410	226,017	342,378	257,548	227,561
Refused To Answer	0	0	314	0	0
Don't Know	14,572	11,302	10,943	3,464	3,816
Total	1,908,867	2,150,102	2,190,490	2,200,159	2,243,988