

SUMMARY OF FINDINGS

Puhoi to Pakiri Area Visitor Strategy Research Programme: Visitor, Business and Community Surveys

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IMPROVING THE SUSTAINABILITY AND PROFITABILITY OF TOURISM

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Executive Summary

This report presents the final results from the 'Puhoi to Pakiri area' (P2P) Visitor, Business and Community Surveys. The report draws on eight months of online survey data collected from 16 August 2010 to 30 April 2011. The report is based on 752 Visitor Surveys (covering 1746 individuals), 286 Community Survey responses and 149 Business Survey responses.

Visitors

The Puhoi to Pakiri region has a visitor base which is dependent on day and short-stay visitors. Visitors are attracted by the beaches, amenities and the scenery of the region which is within easy reach of Auckland.

The split between domestic and international visitors in the sample is 88%/12% with the majority of domestic visitors (75%) coming from the wider Auckland region. Overseas visitors are mainly from Australia (31%), UK (30%) and USA (19%). Most domestic (66%) and international (66%) respondents travel with a partner or spouse to the region. Domestic respondents are more likely to travel in a private car, where international respondents use a rental car to get to, and from, the region.

Just under half (42%) of domestic visitors take a day trip to the area and 58% spend one night or more. For international visitors overnight trips dominate with 82% spending one night or more in the area; 18% go for a day trip. Of those domestic visitors who do stay overnight, 50% generally stay in a 'private home/holiday home'. International visitors who stay overnight tend to stay in 'hosted/B&B' (40%) type accommodation. Domestic visitors stay on average 1.9 nights in the region; international visitors tend to have a longer stay of 4.7 nights (these figures factor in day visits as well).

Domestic visitors are more likely to give their reason for visit as a day trip (33%) or a weekend trip (25%) – perhaps a day to the Matakana Farmer's Market or a weekend get-away; international visitors are more likely to give the main reason for their visit being as 'holiday' (48%) or 'visiting friends and relatives' (22%).

A high proportion of domestic respondents (90%), had visited the P2P region before – and just under half mention 'previous visits' when asked how they gathered information about the region. International visitors mainly use 'word of mouth' to find out about the region or had visited the area before. The collective importance of the Internet is shown with over one quarter (28%) of domestic visitors and 21% of international visitors using one of more websites to gather information.

Visitors to P2P go to a range of locations including the larger settlements of Matakana (62%) and Warkworth (33%), smaller townships such as Leigh (29%) and Puhoi (24%), and coastal

locations, e.g. Omaha Beach (29%) and Goat Island (25%). International respondents were more likely to visit Puhoi (31%) than their domestic counterparts (24%).

There are a number of activity highlights for visitors when they visit the P2P region. 'Farmer's market' (65%), 'arts & crafts' (62%), and 'winery visit/wine trails' (60%) clearly dominate with over half of visitors participating in these activities. Many visitors also engage in 'hiking and walking' (51%) and 'swimming and surfing' (46%), as well as visits to a marine reserve, parks & gardens. 'Shopping' (63%) and 'fine dining' (55%) are also activities that a majority of visitors participate in. Visitors are very satisfied with all of these experiences.

Visitors spend an average of \$100 per day. Domestic visitors spend more (\$102) than their international counterparts (\$87). These figures are lower than the official visitor statistics on expenditure for domestic visitors in New Zealand of \$119 (DTS YEDEC10) and for international visitors of \$112 (IVS YE MAR11). The majority of this expenditure is on accommodation; restaurants/cafes/bars; shopping; and tours, activities and recreation. There is limited spend on local transport. Combining the weighted (domestic 88%/international 12%) length of stay and expenditure data shows that every 1000 visitors produce a direct economic injection of \$234,669.

Beaches, the sea and the coast (33%), along with activities and attractions (31%) are aspects that visitors find particularly appealing about the P2P region. The countryside and scenery (27%), as well as the focus on wine and wineries (26%) are also drawcards. When asked about less attractive elements of their visit, respondents tended to focus on poor infrastructure (31%) and traffic (29%).

While visitors feel that the region has beautiful natural attractions and is an enjoyable travel destination, they also noted a lack of interesting historical attractions, and good shopping opportunities. Overall, visitors are satisfied with their visit, with nearly all domestic (100%) and international (97%) visitors indicating they would consider visiting the region again. Virtually everyone would recommend the P2P region to others.

Visitors most commonly associate the name 'Matakana' (33%) with the P2P region. A significant proportion of visitors (26%) also mentioned that they do not associate any particular name with the area.

Businesses

Businesses surveyed are mainly located in Warkworth or vicinity (36%), and Matakana or vicinity (26%). Nearly one quarter of businesses are 'accommodation providers' with another 22% focusing on 'visitor activities/tours'. The majority (94%) of business survey respondents are locals, and have been operating for 1-14 years. Tourism businesses tend to

have a lower annual turnover than their non-tourism business counterparts. One third of business respondents (32%) say that they have problems finding suitably skilled/trained staff, this percentage is lower for tourism businesses (23%) than for non-tourism (40%).

Many businesses are dependent on tourism with 51% attributing 51-100% of their annual turnover to the visitor industry. Most (92%) of businesses (tourism and non-tourism) operate all year round but on average tourism operations generate over two thirds (67%) of their turnover during the high season.

Both tourism and non-tourism business respondents feel that local businesses are supportive of the visitor industry, and believe that attracting visitors and maximising visitor spend is important, however, they are not convinced that local businesses are good at working together. Half of tourism business respondents are members of Matakana Coast Wine Country (48%) and the Matakana/Warkworth i-SITEs (48%).

While both tourism and non-tourism business respondents are confident that their business will do well in the coming year (67% and 69% agree or strongly agree, respectively), they also feel that the next five years will bring major economic challenges and 'increasing costs'. Finding ways to increase visitor numbers and getting visitors to spend more and stay longer, represent major opportunities for businesses in the coming five years.

'Matakana' (34%) is the name that business respondents most commonly associate with the Puhoi to Pakiri region. 'Rodney' (17%) was the second most common name, followed closely by 'Mahurangi' (16%). Businesses located in the Matakana area (65%) clearly favour the name 'Matakana'; whereas businesses in the Warkworth area are more likely to emphasize 'Rodney' (28%), 'Kowhai Coast' (23%), and 'Mahurangi' (20%).

Community

The activities commonly undertaken by P2P residents in their leisure time are similar to those mentioned by visitors: farmer's & country market, arts and craft, hiking and walking, swimming/surfing, visits to parks, gardens, marine park, as well as shopping and dining.

Over half (64%) of community respondents both live and work in the region – with nearly two thirds working in an organisation linked to tourism. Respondents are generally aged 45 years or over (80%). One quarter of community members surveyed have lived in the region for 5-9 years, and a further 17% for 25 years or more. Residents living in the region, like visitors, are attracted by the 'beach and the coastline' (55%). The 'rural/country feeling' of the region and the 'peaceful' and 'secure' feeling are also highlighted.

The less attractive aspects about living in the region raised by respondents correlate closely to visitor feedback and focus on infrastructural, traffic related and general cost/expenses.

Residents responding to the survey feel strongly (87%) that visitors are important to the economy of the P2P region. Many respondents list 'economic benefits' (77%), 'employment' (35%), and 'more and diverse choice of activities' (34%) as the most positive impacts that stem from visitors coming to the region.

Just over half of community respondents feel that visitors to the region have a positive impact on their quality of life. Nearly one quarter feel that visitors have a negative impact on their quality of life. Of the negative responses the infrastructural and environmental impacts associated with visitors tend to dominate: with traffic congestion/parking and environmental damage upper most in people's minds.

Most community respondents surveyed (77%) feel that promotional campaigns should be used to encourage visitors to the region. They see 'beaches' (59%), 'tranquillity/escape/relax' (57%), and 'vineyards/wine tours' (46%) as the most important features that could be used for promotion. Respondents would like to see more 'ecotourism' (24%) developed in the area, and the development, and improvement of current visitor experiences (21%).

The two names which community respondents most commonly associate with the P2P region are: 'Rodney' (30%) and 'Matakana' (19%). Respondents living in the Matakana area mainly associate the name 'Matakana' (49%) with the P2P region – in contrast to Warkworth residents who tend to link the region with the name 'Rodney' (36%) or 'Mahurangi' (24%).