

# Summertime Visitors to Kaikoura: Characteristics, Attractions and Activities

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**Kaikoura Case Study**

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*Te Whare Wānaka O Aoraki*



# **Summertime Visitors to Kaikoura: Characteristics, Attractions and Activities**

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## Summary

Kaikoura fulfils a variety of roles for the travelling public. Its geographical location and infrastructure supports the needs for many travellers for a ‘convenient break’ in their trips. For visitors who stop for a full day or overnight, marine mammal species (whales and seals in particular) are the major attractions.

There are two major ways to present and analyse visitor data. First, there are distinct differences between the patterns of international and domestic visitors that often serve as a basis for analysis. Second, length of stay can serve as the basis of analysis. For this study, length of stay provides a more useful and statistically robust framework for understanding visitor needs and patterns. Major visitor characteristics, attractions in Kaikoura, and activities are therefore summarised in the accompanying table for three groups: short-stop visitors, day visitors, and overnight visitors.

For short stop visitors (those staying less than two hours), Kaikoura primarily fills the role of a ‘convenient break’ (79.7 per cent of first choice of attraction to Kaikoura). The core of this group comprises domestic (New Zealand) visitors (75 per cent) engaging in more extensive trips. While average expenditure per person per visit is relatively low (estimated at \$2.40 per visitor) some activities are undertaken, including 15.6 per cent who visit the Kaikoura Information Tourism Inc. (KITI) visitor centre. This activity alone indicates a wider interest in Kaikoura, and signifies a potential for increasing length of stay or repeat visitation. Short stop visitors represent a large group – 43.5 per cent of all visitation or an estimated 380,000 visitors annually.

Day visitors to Kaikoura (those staying more than two hours, but not overnight) are numerically the smallest of the three visitor groups. Visitors’ numbers are estimated at 137,000 annually. For these visitors, Kaikoura is a specific destination as evidenced by their high interest in whale watching (48.1 per cent) and visiting the seal colony (43.6 per cent). Engagement in commercial activities and supporting industries lifts daily average daily per person expenditure for this group to \$47.50 the highest of all three groups.

Overnight visitors to Kaikoura, (those staying one or more nights) are mainly international tourists who make up seven of eight overnight visitors. Overnight visitors are estimated at 356,000 annually. Average length of stay is reported as 1.8 days. Within this pattern, domestic tourists tend to stay for shorter periods. Lower cost forms of accommodation (backpackers and motor camps) are used mostly, while commercial activities (whale watching and swimming/viewing dolphins especially) provide the key focus for commercial activity. Informal activities (visiting the seal colony, (63 per cent); and the visitor centre; (77.4 per cent) are nonetheless important to their overall experience in Kaikoura. These activities are paced throughout their visit to indicate an average daily per person expenditure of \$45.73.

Indices of satisfaction, measured as willingness to refer Kaikoura to others, and/or to re-visit, indicate high overall satisfaction by visitors of their experience in Kaikoura.

**Summary Table**  
**Summary Kaikoura Visitor Groups**

		<b>Short Stop (&lt;2 hours)</b>		<b>Day Visitor (&lt;2 hours to 1 day)</b>		<b>Overnight</b>	
Number (sample)	n	64		39		230	
Estimated relative percentage	%	43.5		15.7		40.8	
<b>Composition</b>	%						
Domestic		75.0		41.0		13.5	
International		25.0		59.0		86.5	
<b>Transport</b>	%						
Main		Private car/van	57.8	Bus/shuttle	35.9	Hire car/van	38.3
Secondary		Bus/shuttle	28.1	Private car/van	33.3	Bus/shuttle	33.0
<b>Attractions</b>	%						
Main		Convenient break	79.7	Whales	38.5	Whales	49.6
Second		Whales	9.4	Convenient break	33.3	Swim dolphins	17.0
<b>Activity</b>	%						
Visitor Centre		15.6		48.7		77.4	
Seal colony		10.9		43.6		63.0	
Whale(s)		6.3		48.7		52.6	
Dolphins		3.1		5.1		31.3	
<b>Accommodation</b>	%	Nil		Nil		Backpackers 35.2 Motorcamp 31.0 Motels 17.4	
<b>Group Composition</b>	%						
Main		Family	32.8	Partner/spouse	30.8	Partner/spouse	42.6
Secondary		Alone	26.6	Family	25.6	Alone	21.3
<b>Group Size</b>							
Main (no. of people)	%	3-6	45.3	3-6	38.5	2	56.5
<b>Age</b>	%						
Less than 30 years		21.9		30.8		43.0	
30-49 years		46.9		35.9		38.3	
50+ years		31.3		33.3		18.7	
<b>Gender</b>	%						
Male		58.7		38.5		45.2	
Female		41.3		61.5		53.9	
<b>Travel Direction</b>	%						
North to South		57.1		26.3		36.4	
South to North		38.1		39.5		47.7	
Return Trip		4.8		34.2		15.9	
<b>Expenditure</b>	\$						
Average per visitor per day		\$2.40		\$47.50		\$45.73	
<b>Volume</b>	n						
Estimated Annual Volume		380,000		137,000		356,000	

# Chapter 1

## Introduction

### 1.1 Introduction: Objective, Method and Sample

This report presents an analysis of summertime visitors to Kaikoura. Detailed information is presented on descriptive visitor characteristics, the attractions of Kaikoura, and activities undertaken, for a systematic sample of visitors in January and February 1998. To provide a comprehensive insight into different visitor types, all visitor data are first disaggregated according to respondents' lengths of stay in Kaikoura. The three visitor types are:

- Short-stop visitors (those staying less than two hours in Kaikoura);
- Day visitors (those staying more than two hours up to a full day);
- Overnight visitors (visitors staying one or more nights in Kaikoura).

While there are other possible modes of analysis (for example, international versus domestic tourists), analysis based on length of stay provides the most statistically robust method to realistically disaggregate and discuss visitation patterns.

Accurate and timely visitor data required for all aspects of visitor management, including marketing and promotion, infra- and super-structure planning, and resource management. Other aspects of visitation are reported elsewhere in this report series. For a wider understanding of tourist visitation to Kaikoura readers are referred to: Visitor Decision Making, On-Site Spatial Behaviours, Cognitive Maps and Destination Perceptions: A Case Study of Kaikoura, (Report No. 3); Understanding Visitor Experience in Kaikoura Using Photos of Landscapes and Q Method (Report No. 4); and in Tourist and New Zealand Fur Seal Interactions Along the Kaikoura Coast – a study of tourist/seal interactions in Kaikoura (Report No. 9).

Visitor numbers to Kaikoura have increased considerably over the past 12 years<sup>1</sup>. This is evidenced in both Kaikoura Information Tourism Inc. (KITI) data and in Census data that record all inhabitants of New Zealand in one March night. Both of these data sets have limitations: KITI because it was first established in 1986, and has both shifted premises and evolved considerably since its inception; and Census data because they record accurately only one March evening every five years. Notwithstanding these problems, these data sources offer some indication of tourism evolution at Kaikoura and afford a reasonable estimate of recent growth.

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<sup>1</sup> Raw data vary considerably over this early period of tourism development. Census and KITI data are summarised in Appendix 1.



At the most general level, the Census data indicate a 56-fold increase in international tourist numbers (1981 – 96 Census data; 15 year period), while KITI data indicate a 12-fold increase in visitation during the 12 year period of its operation<sup>2</sup> (1986 - 96). Visitor data are more convergent between 1991 and 1996 (4.2-fold and 6-fold growth respectively), with much of the difference between these estimates explained by the relocation of KITI into the Town centre late in 1992. The most recent data are more convergent again. When the latest (5 year) inter-censal data (1991 – 96) are compared with the four years since KITI relocated (1993 – 97) (Table 1), they indicate 66 per cent and 59 per cent growth for their respective time periods, and importantly, when corrected to annual growth, they suggest average annual growth rates of 13.3 per cent and 14.7 per cent respectively.

**Table 1**  
**Comparisons of Visitor Growth**  
**Census and KITI Data**

<b>Years</b>	<b>Source</b>	<b>% Change</b>	<b>Average Annual Growth</b>
1991 – 96	Census	66	13.2
1993 – 97	KITI	59	14.8

Current estimates of visitor flows<sup>3</sup> based on local traffic counters and observation of vehicle registrations put total visitation at 873,000 annually. This figure includes estimates of a considerable volume of short-stop visits, as well as day excursionists and ‘overnight’ visitors. While technical definitions used in official tourism statistics (see NZTC, 1984) report only ‘overnight’ domestic and international tourists, a wider definition is taken here, because all visitors add to the total activity in Kaikoura and compel response and adaptation from both the residents and their District Council.

### **1.1.1 Methods And Sampling Procedures**

Questionnaires were administered during the peak period of summer visitation. Draft questionnaire(s) were designed after the first period of the overall research programme’s<sup>4</sup> ethnographic fieldwork, and pre-tested on 27<sup>th</sup> and 28<sup>th</sup> November. After review, a second pre-test was conducted on 18<sup>th</sup> December 1997. The Lincoln University Human Subjects Ethics Committee granted ethical approval for sampling method and instrument (ref 97/21).

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<sup>2</sup> Comment on the reliability of the KITI data is made later in this report.

<sup>3</sup> See Estimating the Number of Visitors to Kaikoura Over One Year by Developing a Vehicle Observation Method (Report No. 2) for method of estimate and data sources.

<sup>4</sup> The community study for which these data were largely compiled is documented in Evolution and Change in Kaikoura: Responses to Tourism Development (Report No. 6).

Formal sampling occurred at two distinct periods, January 25<sup>th</sup> and 26<sup>th</sup>, and February 25<sup>th</sup> to 1<sup>st</sup> March, 1998. Analyses of these two data sets indicate some differences in visitor composition, as the former occurred during the New Zealand domestic (school holiday) period, and the latter occurred during late summer when a smaller volume of New Zealanders (without the constraints of school-aged children) travel, and the proportion of international visitors is correspondingly higher.

Sampling was conducted at two major visitor sites:

- the public car park/town centre, and
- at the southern end of the public car park outside the visitor centre.

These sites were chosen on the basis of previous observations confirming that these locations were two major points of congregation for visitors in the Town centre.

Sampling was stratified within one hour blocks (one hour on, one hour off) throughout the day, and balanced on alternate days, to provide a full hourly profile from 0800 to 1900 hours. Interviewers also recorded interview time to allow comparisons of data with sample times. Subsequent analysis of the database demonstrated no significant differences in key variables across sample times.

The sample was conducted on a face-to-face structured interview basis. Visitors were approached on a “next-to-pass” basis and invited to participate in a brief interview. The average interview time was five minutes. Interviewers had been briefed on their ethical responsibilities and carried questionnaires on Lincoln University clipboards, as well as wearing name tags identifying the interviewer, research project and institution. The questionnaire is included as Appendix 2.

The number of completed questionnaires is 333, across the seven full sample days. Refusals were uncommon and comparisons with key data (country of origin, and gender, and age [estimated]) gleaned from this group prove statistically insignificant *vis à vis* the main sample.

### **1.1.2 Sample Weighting and Adjustments**

Visitation to Kaikoura is not consistent throughout any one day. As demonstrated in the separate report estimating visitor volumes and flow<sup>5</sup>, there are late-morning and mid-afternoon peaks in visitation, generated as both ‘short-stop’ and day visitors enter and leave the area. Short-stop visitors largely treat Kaikoura as a “convenient break” in a longer trip and, as such, were less likely to be sampled, so they are under-represented in our sample. Overnight visitors are more consistent in their use of the downtown (sample) area.

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<sup>5</sup> See Estimating the Number of Visitors to Kaikoura Over One Year by Developing a Vehicle Observation Method (Report No. 2)

Nonetheless, they have their own distinct pattern of visitation, for example, as they arrange for, or commence, activities or dining etc. Visitors who stay more than one night had a greater opportunity of being interviewed and thus they are over-represented in our sample. Any attempt to sample visitors systematically, therefore, must take account of both overall visitor flow and composition at any particular sample time.

The overall research project was designed to detect and mitigate these kinds of problems by utilising data from a variety of sources. For this study, weights were calculated using data from the traffic flow analysis. Traffic observation data were collected for one, two or three days throughout each of the five summertime months, approximating the summertime sample for visitors. Recording and analysis of vehicle registration plates<sup>6</sup> gave a ratio of private, rental and commercial vehicles. Data from the questionnaire itself indicated the proportion of domestic and international visitors using each of these transport modes and thereby provided an independent means to correct the visitor sample to observed arrivals into Kaikoura township<sup>7</sup>.

Notwithstanding this correction, unweighted data have been used for the majority of this report as they allow a true description of the characteristics of the different groups within the sample. Weighted data are only used in aggregate analyses to generate figures on total market size and to estimate average per person per day expenditure.

### **1.1.3 Limitations**

As in all surveys, there are limitations to the data. First, the sample was taken during limited time periods in the late summer. While every care has been taken in sampling and analysis, the data cannot purport to represent visitors throughout the full year. Visitation patterns, groups and activities may vary for example, with season and daily weather. Second, for the “short-stop visitor” the sample does not contain any data on those who stop (and spend) on the northern strip of the town along State Highway 1. This sub-group is also excluded from the traffic flow report. Finally, given the high volume of visitation to Kaikoura, the sample (for day visitors in particular) draws on a small absolute sample base. The standard error of the data is estimated at  $\pm 4.8$  per cent. Reliability of data could be improved by increasing sample sizes or through ongoing monitoring of visitors.

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<sup>6</sup> Data on vehicle ownership and use are available on a case by case basis from the New Zealand Vehicle Registration Centre.

<sup>7</sup> The simultaneous equation is given in Appendix 3

However, the resultant visitor profile and cross-checks (for example, with annual estimates of seal visitation and commercial accommodation usage) contained in the report indicate it does present a robust picture of visitor patterns. Consistency of visitor profiles in this and subsequent reports on aspects of visitors' decision-making (Visitor Decision Making, On-Site Spatial Behaviours, Cognitive Maps and Destination Perceptions: A Case Study of Kaikoura, Report No. 3) and at seal colonies (Tourist and New Zealand Fur Seal Interactions Along the Kaikoura Coast, Report No. 9) also confirms the general reliability and validity of data.

# Chapter 2

## Results

### 2.1 Introduction

As indicated in the previous discussion “length of stay” should be a primary factor in data analyses and presentation. Analysis on this variable provides both the most statistically robust analysis and an easily understood format for users of this report. Data are presented as three distinct groups: These are:

- Short-stop visitors: (people staying less than two hours);
- Day visitors: (people who stay more than two hours but not overnight);
- Overnight visitors: (people who stay one night or more in the area).

The following analysis (Table 2) demonstrates that there are distinct differences between these groups in terms of market composition, transport, attractions visited, and expenditure. Similarities and differences between these groups provide the basis for the discussion that follows. This approach leads most readily to indications for marketing and resource planning considerations, which are separately discussed in the following sections.

### 2.2 Short-Stop Visitors

‘Short-stop visitors’ - people who make a short break of less than two hours duration at Kaikoura - constitute a significant part of the total visitor flow to Kaikoura. There are 64 respondents to the interviews who fit these criteria. Based on the weighting formula derived from the Visitor Flow analysis this is estimated as 43.5 per cent of the total visitor flow, or close to 380,000 visits per year. Although this groups is defined as being visitors who stop at Kaikoura for less than 2 hours, observations indicate a common visit pattern of a ‘convenient’ refreshment break lasting perhaps 15-30 minutes. Some do not spend any money within Kaikoura - being ‘self contained’ in terms of their refreshment needs. As indicated previously, a number of similar visitors who stop on the northern strip of the town on State Highway 1 who do not visit the Town centre are not included in this sample.

The short-stop visitation pattern arises from Kaikoura’s geographic position, on State Highway 1, close to the mid-point of the Picton/Blenheim to Christchurch route. Although some would dismiss this group because of their seemingly low expenditure, this group does add significantly to the infrastructure requirements (for example, parking and toilets especially) and in visitation to key sites. Furthermore, without knowing specific details about this group’s travel patterns, the fact that they are existing travellers suggests that it may be possible to influence them to stay longer in Kaikoura and to increase their expenditure while there.

**Table 2**  
**Summary Kaikoura Visitor Groups**

		<b>Short Stop (&lt;2 hours)</b>	<b>Day Visitor (&lt;2 hours to 1 day)</b>	<b>Overnight</b>
Number (sample)	n	64	39	230
Estimated relative				
<b>Composition</b>	%			
Domestic		75.0	41.0	13.5
International		25.0	59.0	86.5
<b>Transport</b>	%			
Main		Private Car/van 57.8	Bus/shuttle 35.9	Hire car/van 38.3
Secondary		Bus/shuttle 28.1	Private Car/van 33.3	Bus/shuttle 33.0
<b>Attractions</b>	%			
Main		Convenient break 79.7	Whales 38.5	Whales 49.6
Second		Whales 9.4	Convenient break 33.3	Swim dolphins 17.0
<b>Activity</b>	%			
Visitor Centre		15.6	48.7	77.4
Seal colony		10.9	43.6	63.0
Whale(s)		6.3	48.7	52.6
Dolphins		3.1	5.1	31.3
<b>Accommodation</b>	%	Nil	Nil	Backpackers 35.2 Motorcamp 31.0 Motels 17.4
<b>Group Composition</b>	%			
Main		Family 32.8	Partner/spouse 30.8	Partner/spouse 42.6
Secondary		Alone 26.6	Family 25.6	Alone 21.3
<b>Group Size</b>				
Main (no. of people)	%	3-6 45.3	3-6 38.5	2 56.5
<b>Age</b>	%			
Less than 30 years		21.9	30.8	43.0
30-49 years		46.9	35.9	38.3
50+ years		31.3	33.3	18.7
<b>Gender</b>	%			
Male		58.7	38.5	45.2
Female		41.3	61.5	53.9
<b>Travel Direction</b>	%			
North to South		57.1	26.3	36.4
South to North		38.1	39.5	47.7
Return Trip		4.8	34.2	15.9
<b>Expenditure</b> <sup>8</sup>	\$			
Average person per day <sup>9</sup>		\$2.40	\$47.50	\$45.73
<b>Volume</b> <sup>8</sup>	n			
Estimated Annual Volume		380,000	137,000	356,000

<sup>8</sup> Data for these two variables have been weighted by estimated relative percentage data (as confirmed by visitor flow data presented in Estimating the Number of Visitors to Kaikoura Over One Year by Developing a Vehicle Observation Method (Report No. 2)

<sup>9</sup> These data represent average per visitor per day expenditure. For example, visitors who stay overnight do so for an average of 1.83 nights and generate total per person expenditure of \$83.70, and short-stop visitors are recorded as .25 day. The Economic Impact of Tourism on Kaikoura (Report No. 8) estimates total visitor expenditure at \$28m annually.

### 2.2.1 Characteristics

Visitor groups for short-stop visitors tend to be small (alone 26.6 per cent, couple/pair, 26.6 per cent), and/or family oriented (32.8 per cent) (Table 3).

**Table 3**  
**'Short-Stop Visitors': Group Composition**

<b>Group Composition</b>	<b>N</b>	<b>%</b>
Alone	17	26.6
Partner/spouse	10	15.6
Family	21	32.8
Friends	8	12.5
Family and friends	4	4.7
Friends and partner	3	4.7
Special interest	1	1.6
	<b>64</b>	<b>100.0</b>

All age groups are represented in the short-stop visitor category and they present a similar age profile to that of full day visitors (Table 2, p.5). Just under half (46.9 per cent) are aged between 30 - 49 years, with those less than 29 years comprising 21.9 per cent of the sample and those over 50 years 31.3 per cent.

Importantly, 75 per cent of short-stop visitors are New Zealand domestic travellers, making this the group containing the greatest proportion of domestic travellers (Table 2, p.5).

Two primary modes of transport are pre-eminent for this group. These are private cars/vans 57.8 per cent and 28.1 per cent for buses/shuttles. It is this latter group for whom time in Kaikoura is most constrained, because of their commercial travel schedules.

### 2.2.2 Attractions and Activities

Short-stop visitors see Kaikoura as a 'convenient break' (79.7 per cent) as their main attraction at Kaikoura. Notwithstanding this fact, some 75 per cent report their primary reason for travelling is being on holiday or visiting friends and family.

Similarly for Cantabrians (35.9 per cent of this group) the Marlborough Sounds/Nelson region is a significant summer holiday destination. Fifty seven per cent are travelling north to south and 38 per cent south to north during the sample periods. Only five per cent are part of a separate day's outing.

Notwithstanding the overall pattern of a 'short refreshment break' in Kaikoura, some of this group do stay longer and extend their visits with other activities. Respondents were asked to list both their actual and intended activities. These are listed in Table 4 below.

**Table 4**  
**‘Short-Stop Visitors’: Activities**

Activities	N	% <sup>1</sup>
Information Centre	10	15.6
Seal colony	7	10.9
Whale watching	4	6.3
Dolphins swim/watch	2	3.1

Notes: 1. Data do not sum to 100 per cent. Rather they indicate the number and proportion of short-stop visitors who engage in any activity.

The sheer volume of the short-stop group suggests that even these relatively small proportions listed above imply significant visitor volume. For example, when aggregated to an annual figure, short-stop visitors contribute approximately 41,500 of the annual 291,000<sup>10</sup> visits to the seal colony. Similarly, this group generates approximately 59,000 visits annually to the Information Centre.

In spite of the seemingly transitory nature of their visits, respondents demonstrate high indices of satisfaction: 78.3 per cent would recommend Kaikoura to others, and 57.4 per cent definitely plan to return, with a further 16.7 per cent indicating a general willingness to return.

### 2.3 Day Visitors

Day visitors are the second important visitor group to Kaikoura. As with short-stop visitors, day visitors do not appear in ‘official’ tourism statistics where an overnight stay criterion is required, however, this group is significant in tourism planning and management in Kaikoura. Day visitors, defined in this analysis as visitors staying greater than two hours but not overnight, engage in a broad range of activities at Kaikoura, and add to general resource management and marketing challenges.

From our late summer sample, and its comparison with annual visitor flow data, we estimate some 15.7 per cent of all visitors (137,000 annually)<sup>11</sup> fit into this category. Thirty-nine visitors in our sample were defined within this group.

Day visitors to Kaikoura are of two distinct types: stop for ‘a day’ as part of a longer trip and those who make a separate, single day trip to Kaikoura. Both of these groups are common in Kaikoura with 65.8 per cent in the former category and 34.2 per cent in the latter.

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<sup>10</sup> This figure is based on scaling all visitors in the sample who reported visiting the seal colony. Department of Conservation figures (1996) (scaled to an annual estimation) indicate 283,000 visits. It should be noted, however, that both these samples draw on summertime data, and therefore are likely to overestimate actual visitation which declines during the winter months.

<sup>11</sup> Of all the estimates of visitor groups, this one contains the great uncertainty because of the number of packaged day tours originating in Christchurch, which contain tightly scheduled activities, which thereby minimise the opportunity for individuals in this group to be captured within our sample.



Sixty-six per cent of day-visitors visit Kaikoura as they pass through en-route to other destinations and are travelling north (39.5 per cent), or south (26.3 per cent). For the remainder, 23.1 per cent of visitors originate from and return to Christchurch, while a final 7.7 per cent originate and return to Blenheim.

While not evident from summary data, all interviewers observed that some day visitors were travelling in groups that contained both international and domestic tourists. At times, New Zealanders ‘sponsor’ or facilitate a visit to Kaikoura by accompanying overseas visitors who may be staying or visiting with them elsewhere. Similarly, some New Zealanders, aware of the recent growth of tourism in Kaikoura, visit to see the changes in Kaikoura or to visit a new place (7.7 per cent). For day visitors, a further 7.7 per cent of respondents reported being part of special interest and tour groups.

### 2.3.1 Characteristics

Day visitors to Kaikoura are family-oriented (family 25.6 per cent, partner/spouse 30.8 per cent) and, as such, tend to travel in reasonably large group sizes (3-6 people: 38.5 per cent) (Table 2, p.5). Of the three visitor group profiles discussed within this report, day visitors present the most balanced age profile (Table 5).

**Table 5**  
**‘Day Visitors’: Age Profile**

<b>Age</b>	<b>%</b>
< 30 years	30.8
30 – 49	35.9
50+	33.3
	<b>100.0</b>

While short-stop visitors were reasonably balanced on the basis of gender, some 61.5 per cent of day-visitors were female.

Unlike short-stop visitors, where domestic (New Zealand) travellers clearly dominate, 59 per cent of day visitors were international in origin. As indicated elsewhere in this report, the question of visitor origin (domestic:international) is the single variable most strongly associated with other patterns of visitation. Mode of transport varies, particularly with the change in international/domestic market mix. Three main transport modes account for 92.3 per cent of day visitors (Table 6).

**Table 6**  
**‘Day Visitors’: Transport Mode**

<b>Mode of Transport</b>	<b>N</b>	<b>%</b>
Bus/Shuttle	14	35.9
Private Van/Car	13	33.3
Hire Van/Car	9	23.1
Other	3	7.7
	<b>39</b>	<b>100.0</b>

### 2.3.2 Attractions and Activities

Of the day-visitor sample, 38.5 per cent said that the main reason that they came to Kaikoura was ‘to see the whales’. This rises to 46.2 per cent when all three attraction choices are considered. Kaikoura’s location as a ‘convenient break’ remains a strong reason for stopping there (33.3 per cent of day visitors give this as their first reply). Other marine-based activities, incorporating seeing and/or swimming with seals and dolphins and coastal scenery together constitute an important third dimension (12.8 per cent of first choices).

Respondents’ reports of Kaikoura’s attractions clearly flow into activity choices. Reports of actual (and intended at time of interview) activities (Table 7) during their visit are:

**Table 7**  
**‘Day Visitors’: Activities**

<b>Activity</b>	<b>N</b>	<b>%<sup>1</sup></b>
Whale watching	19	48.7
Information Centre	19	48.7
Visit seal colony	17	43.6
Dolphin swim/watch	2	5.1

Notes: 1. Data do not sum to 100 per cent. Rather they indicate the number and proportion of day visitors who engage in any activity.

Both commercial and informal wildlife experiences (whale and seal visiting) predominate, as does visiting the Information Centre.

An interesting feature of the key summary data presented for each group in Table 2 (p.5) is that day visitors to Kaikoura spend more money on an average per person per day basis than overnight visitors. Reasons for this lie in the high proportion of day visitors who engage in commercial activities, set against the low cost structure of much accommodation (see below) and the fact that overnight visitors spread commercial activities throughout their visit.

Once again, measures of satisfaction are high: 81.6 per cent would ‘recommend’ Kaikoura to others (15.8 per cent “maybe”); and 55.4 per cent would ‘return’ with strong conditional support (30.3 per cent, ‘maybe’). Many of this latter group, were visitors from overseas who indicated their uncertainty as to whether they would ever be able to return to New Zealand.

## 2.4 Overnight Visitors

Overnight visitors represent the typical definition of tourists, however, as the previous sections indicate, there are significant variants of other visitor types which each require response from both industry providers and the public sector. The tourism industry most often focuses on overnight visitors because of their interaction with the accommodation sector.

Overnight visitors to Kaikoura are estimated to constitute 40.8 per cent of visitor flows to indicate an annual overnight visitation of 356,000 visitors. As indicated in the introductory section this group tends to be over-represented in the sample, and is represented by 230 interviewees. As a cross-check on the reliability of these data, a separate estimate of commercial visitor accommodation at February 1998 indicate 2,320 available beds. An estimate of capacity, (based on a 50 per cent single, 50 per cent double weighting), indicates accommodation is available for 3,390 people. This estimate corresponds well with peak daily overnight visitor arrivals of 3,483 people, as reported in the Report estimating total visitor numbers and flow<sup>12</sup>. KITI informally estimates 200,000 visitors annually staying in commercial accommodation. While these comparisons indicate a high level of congruence it must also be noted that considerable additional capacity often exists in the informal accommodation sector (private baches, campgrounds, campervan sites, etc.).

### 2.4.1 Characteristics

The most striking characteristic of the overnight visitor group is the significant presence of international visitors (86.5 per cent). Indeed these figures, albeit from a summertime sample, indicate fewer than 50,000 New Zealand visitors staying overnight annually.

The most common (modal) length of stay is one night (45.1 per cent) with average length of stay 1.82 nights for those that stay in Kaikoura .

**Table 8:**  
**‘Overnight Visitors’: Length of Stay**

<b>Length of Stay</b>	<b>N</b>	<b>%</b>
One night	96	45.1
Two nights	76	35.7
Three nights	23	10.8
Four nights	18	8.5
	<b>213</b>	<b>100.1</b>

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<sup>12</sup> See Estimating the Number of Visitors to Kaikoura Over One Year by Developing a Vehicle Observation Method (Report, 2).

Group size and composition clearly reflect the significance of young international travellers in this visitor group. People travelling alone (21.3 per cent) or with one other person (56.5 per cent) are prevalent, as are partner/spouse group composition (42.6 per cent) and friends (18.3 per cent). Families (more common among the New Zealand sub-group) are the only remaining significant group (12.6 per cent). The high number of couples and small groups in this group are reflected in an even gender balance (54.4 per cent of female, 45.6 per cent male).

The age profile of the overnight visitor group to Kaikoura (see Table 9) reflects the above profile, demonstrating a significantly younger profile than either the domestically based ‘short-stop’ group or more mixed ‘day visitor’ group (Table 2, p.5).

**Table 9**  
**‘Overnight Visitors’: Age Profile**

<b>Years</b>	<b>N</b>	<b>%</b>
15 – 19	7	3.0
20 – 29	92	40.0
30 – 39	64	27.8
40 – 49	24	10.4
50 – 59	21	9.1
60 – 69	18	7.8
70+	4	1.7
	<b>230</b>	<b>99.8</b>

For overnight visitors to Kaikoura, private cars drop to the third most common mode of transport, with commercial forms of transport (hire vehicle/and scheduled/commercial transport) dominating (Table 10). Again, these are significantly associated with the international-domestic market split, where 83.9 per cent of domestic overnight travellers travel by private car, whereas 84.4 per cent of international travellers in this group travel by hire car or public transport (Pearson’s  $\chi^2 = 81.9$ ,  $df = 1$ ,  $p = 0.0000$ ).

**Table 10**  
**‘Overnight Visitors’: Travel Mode**

<b>Mode of Travel</b>	<b>N</b>	<b>%</b>
Hire Car/Van	88	38.3
Bus/Shuttle/train	85	36.9
Private Car/Van	48	20.9
Other	10	4.4
	<b>231</b>	<b>100.5</b>

### 2.4.2 Accommodation

Table 11 shows the types of accommodation available in Kaikoura and the relative proportions of overnight visitors that use them. These data indicate that the largest part of the overnight market use accommodation at the cheaper end of the range, with two-thirds using either backpacker or motor camp accommodation.

**Table 11**  
**‘Overnight Visitors’: Accommodation Use**

<b>Type of Accommodation</b>	<b>N</b>	<b>%</b>
Backpackers	75	35.2
Motor camp	66	31.2
Motels	37	17.4
Bed and Breakfast/Farm Stays	14	6.6
Campervan	8	3.8
Rented House	7	3.3
Private Home	4	1.9
Hotel	2	1.0
	<b>213</b>	<b>100.2</b>

### 2.4.3 Attractions and Activities

Overnight visitors are clearly attracted to Kaikoura by whales (49.6 per cent), dolphins (17.0 per cent) and other marine features (4.8 per cent). Among this visitor group, visiting the seal colony (63.0 per cent) is the most commonly mentioned first choice of activity, with whale watching (52.6 per cent) second, and swimming/watching dolphins the third choice at 31.3 per cent. When scaled to annual figures, this group accounts for 224,000 visits (77 per cent of the total) to the seal colony. A significant proportion (77.4 per cent) of this group make use of the information centre, presumably to learn more about the area and the recreational opportunities available.

Overnight visitors engage in both commercial and non-commercial activities and appear to spread these over the length of their visit, however the requirement for overnight accommodation maintains a reasonably high average daily expenditure of \$45.73, and total per person expenditure of \$83.70.

Once again, measures of satisfaction are high: 84.3 per cent of the overnight sample said that they would recommend Kaikoura to their friends (a further 10 per cent said “maybe”). Responses to the question of return visitation to Kaikoura are significantly associated with international and domestic origin (Pearson’s  $\chi^2 = 33.25516$ ,  $df = 3$ ,  $p = 0.000$ ). Seventy per cent of New Zealanders said that they were planning to return to Kaikoura, whereas only 18 per cent of overseas travellers said that they would return. A further 32.1 per cent of the overnight sample said they may return while another 19.6 per cent did not answer the question - usually because they felt that they had not seen enough of Kaikoura at the time of interview to make such a judgement.

## 2.5 A Note on Domestic and International Tourists

An alternative way in which the data may have been analysed was by comparing domestic and international tourists. These two groups are significantly different to each other on a range of variables. New Zealanders are more likely to travel as part of a larger family group and are much less likely to go whale watching (Pearson's  $\chi^2=54.299$ ,  $df=1$ ,  $p=0.000$ ) or dolphin swimming (Pearson's  $\chi^2=11.410$ ,  $df=1$ ,  $p=0.00073$ ) than their international counterparts. They are away from home for shorter periods (Pearson's  $\chi^2 = 57.010$ ,  $df =4$ ,  $p=0.000$ ) and as a proportion of total overnight visitors, few New Zealanders stay in Kaikoura overnight, however a very large number pass through the town on their way between Christchurch and Blenheim/Picton. Observations in the town indicate that many New Zealanders are unaware of the opportunities that Kaikoura has to offer, and many express surprise at how the Town has changed in recent years. It would seem therefore, that the domestic market may provide a good focus for any further marketing activities. Many New Zealanders, particularly those travelling in family groups, do not participate in commercial activities such as whale watching, which means that a different set of attractions must be marketed to domestic tourists.

Of further interest is the fact that only a very small proportion of short-stop and day visitors visit the information centre, whereas a large proportion of overnight visitors make use of it<sup>13</sup>. This means that it is likely to be profitable to market the town's attractions in the places that day and short-stop visitors frequent. Places of origin for international and domestic visitors are presented in Tables 12 and 13.

**Table 12**  
**International Visitors to Kaikoura: Comparison of Estimates of Places of Origin**

Sample Proportion	Visitor Survey <sup>1</sup> %	KITI <sup>1</sup> (Jan.-Feb. 1998) %	Census (March 1996) %
Central Europe	34.6	22.1	29.0
UK	26.6	36.6	31.1
Australia	9.3	6.2	8.1
Japan	8.4	3.4	6.1
Nordic	8.3	9.6	8.2
North America	6.7	15.2	8.7
Asia	2.9	1.4	(1) <sup>2</sup>
South America	1.3	0.7	(1) <sup>2</sup>
Other	1.7	4.8	8.8

- Notes:
1. International visitors comprise 73.7 per cent of the Visitor Survey and 72.5 per cent of KITI's survey respondents. As discussed previously (Sample Weightings and Adjustments, Section 1.1.2), both these surveys over represent the proportion of international visitors to Kaikoura.
  2. These smaller categories are not comparable from Census data and are presented in the 'other' category.

<sup>13</sup> Further information on the ways that New Zealanders make a decision to visit Kaikoura can be found in Visitor Decision Making, On-Site Spatial Behaviours, Cognitive Maps and Destination Perceptions: A Case Study of Kaikoura (Report No. 3).

**Table 13**  
**Domestic Visitors<sup>1</sup>: Place of Origin**

<b>Place of Origin</b>	<b>%</b>
Canterbury	44.1
Auckland and Northland	16.1
Wellington	11.8
Central North Island	7.5
Southland	6.5
Mare/Nelson	6.5
Other North Island	4.3
Other South Island	3.3
	<b>100.0</b>

Notes: 1. Domestic visitors comprise 26.3 per cent of the Visitor Survey. Domestic places of origin were not asked in the KITI survey.

## Chapter 3

### Discussion and Conclusions

The results of the visitor survey, presented in this report indicate that there are three distinct visitor groups in Kaikoura. Short-stop visitors usually pass through the area stopping only for refreshments and a break from driving, however a few of these people do engage in local activities. Day visitors stay longer in the area but not overnight and they are more likely than short-stop visitors to participate in the commercial and non-commercial activities that the town has on offer. Overnight visitors can stay anything from one to seven nights while they enjoy the scenery and activities.

Kaikoura represents a convenient place to stop on the road between Christchurch and Picton/Blenheim. The data clearly identify the significance of marine mammal species to Kaikoura visitors. The management of human interactions with these species must remain, therefore, as a central theme in the sustainable management of tourism in Kaikoura<sup>14</sup>.

For commercial tourism interests, each of these groups represents opportunities. Short-stop visitors, while largely comprised of domestic travellers, may be largely unaware of the newly created opportunities at Kaikoura. Only a few of the short-stop group, or New Zealanders in general, are visitors to the information centre. Significantly, this methodology has not sampled the “gobble and go” visitor who stops in the northern strip of the town, many of whom may be open to enticement to stay longer, and/or increase their expenditure) in the main township.

Day visitors, while not a large proportion of total visitation still generate significant visitor volume and are good users of commercial activities and support services at Kaikoura. Because of the independent excursions from Christchurch, this group has been the most difficult to estimate. Notwithstanding this, the fact that so many trips originate from Christchurch indicates that it is a good area on which to focus promotional activities. While significant numbers of New Zealanders visit Kaikoura, the great majority of overnight visitors are overseas tourists, most often young couples on an extended tour of New Zealand. Clearly promotional efforts have been successful in earning Kaikoura a place as a key destination in New Zealand as indicated by the high proportion of these people who participate in commercial marine activities. Promotion and marketing opportunities for this group need to focus on maintaining high levels of visitor satisfaction and ensuring a broad mix of visitors (both international and domestic) to meet industry and community expectations.

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<sup>14</sup> For a discussion of these interactions, with a special focus on seal/tourist interactions, refer to Visitor and New Zealand Fur Seal Interactions along the Kaikoura Coast, Report No. 9.



A further conclusion of this research lies in understanding sampling problems in monitoring visitors to any tourist destination. The ability to triangulate various research findings from this survey with others using different techniques has exposed the challenges of drawing representative samples from tourist flows. These are likely to be of concern in much tourism research and monitoring at all destinations where people spend varying lengths of time. People who stay longer in an area are more likely to be sampled than those who are merely passing through and who stay only a short time. This means that at sites such as Kaikoura it is likely that any further monitoring or marketing research is likely to overestimate the numbers of overnight visitors compared with numbers of short-stop visitors. This is also of importance for KITI who monitor visitor activity at the information centre. The fact that only a small proportion of short-stop and day visitors call in at the information centre is likely to skew the results of their monitoring even further. Within this pattern the low levels of visitation to the information centre by New Zealand domestic travellers means that this is a group who are under-represented in KITI figures. To provide an ongoing picture of visitation to Kaikoura, tourism interests will need to embrace a more formal sampling frame taking account of tourist flows and activities.

## References

Kaikoura Information Tourism Inc. (KITI) 1998  
Visitor Centre Market Research Questionnaire Statistics  
KITI – Photography 4/1998-08-31

New Zealand Tourism Council [NZTC] (1984)  
New Zealand Tourism: Issues > Policies  
NZTC Wellington NZ

Statistics New Zealand (1996)  
Census of Population and Dwellings (1981-96)  
Extracted by 'Supermap' (StatsNZ software)



# Appendix 1

## Census and KITI Visitor Data 1981-1998

### Tourism Growth in Kaikoura (Census Data)

	1981	1986	1991	1996
<b>Overseas</b>	33	51	267	444
<b>% Increase</b>	0	54	423	66
1981-96				1245
1986-96				707
1991-96				66

### Tourism Growth in Kaikoura (KITI Data)

	1981	1986	1991	1996
<b>Visitors</b>	n/a	3409	27655	190164
<b>% Increase</b>			711	588
1986-96				5478

	1993	1997
<b>Visitor Count<sup>1</sup></b>	124061	197180
<b>% Increase</b>		58.9

Notes: 1. This 4 year time period is seen as a more reliable basis for comparison as KITI was re-located into its current building in the Town Centre late in 1992, and visitation rose dramatically at this time

### Market Composition (Census Data)

	1981		1996	
	n	%	n	%
Australian	9	27	36	8.1
North American	12	36	39	8.8
United Kingdom	3	9	138	30.4
Western European	-	-	135	30.4
Japan	-	-	27	6.1



**Appendix 2**  
**Visitor Questionnaire**

Int:            date:            time:

**Visitor Survey at:**

**1) When did you arrive in Kaikoura?**

- 0. Arrived today
  - 1. Arrived yesterday
  - 2. the day before yesterday (2 days ago)
- Arrived \_\_\_\_\_ days ago

Do we want time of arrival?

**2) How long are you in Kaikoura for?**

- 0 Less than 2 hours
- 0.5 More than 2 hours (not overnite)
- 1-4. For ? nights

**3) If staying, what kind of accommodation are you using?**

- |                             |                              |                          |
|-----------------------------|------------------------------|--------------------------|
| 1 Bed and breakfast         | 2 Motor Camp                 | <input type="checkbox"/> |
| 3. Pub                      | 4 Private Home               |                          |
| 5 Motels                    | 6 Backpackers                |                          |
| 7 Farmstay                  | 8 Bach/ crib                 |                          |
| 9 Motor Inn                 | 10 Hotel                     |                          |
| 11 Rented House/ bach/ crib | 12 campervan (not motorcamp) |                          |
- other (specify) \_\_\_\_\_

**4) How did you travel to Kaikoura?**

- |                    |                 |                          |
|--------------------|-----------------|--------------------------|
| 1. Private Car/van | 2. Hire Car/van | <input type="checkbox"/> |
| 3. Hitch hiking    | 4. Motor Cycle  |                          |
| 5. Bus/ shuttle    | 6. Plane        |                          |
| 7. Train           | 8. Bicycle      |                          |
- Other (specify) \_\_\_\_\_

**If individual transport, how often have you driven into the town**

- 1. From the top of the hill \_\_\_\_\_
- 2. At the main intersection \_\_\_\_\_

**5) What best describes your visit? (✓ as appropriate)**

- 1. Passing through N to S
- 2. Passing through S to N
- 3. Return trip to Kaikoura from \_\_\_\_\_

**6) Where do you normally live?**

- 1. NZ (specify where) \_\_\_\_\_
  - 2. UK
  - 3 Germany
  - 4. Japan
  - 5. Sweden
  - 6. Canada
  - 7. Taiwan
  - 8 USA
  - 9. The Netherlands
  - 10. Denmark
  - 11. Australia
  - 12. Korea
- Other (specify) \_\_\_\_\_

**7) How many days are you travelling (in NZ) for? \_\_\_\_\_ days**

**8) What day of your trip is it? \_\_\_\_\_**

**9) What is the main attraction for you in Kaikoura? (Record up to three)**

- 1. Convenient break in trip
  - 2. To see the whales
  - 3. To have a holiday/ relax
  - 4. To swim with or see dolphins
  - 5. To see the seals/ seal swimming
  - 6. To see family &/or friends
  - 7. Wanted to see a new place
  - 8. Wanted to see Kaikoura again
- Other (specify) \_\_\_\_\_

**10) What is the main reason that you are travelling in New Zealand (Record up to 3 if they are offered) Prompt or show card?**

- 1. To have a holiday/ relax main
  - 2. Business/ conference
  - 3. Visit friends & family (2nd)
  - 4. To play or watch sport
  - 5. To attend some event (3rd)
  - 6. To visit a particular attraction
- Other (specify) \_\_\_\_\_

**11) Have you visited any of the following attractions on this visit? (✓) ?**

Whalewatching <sub>1</sub>	<input type="checkbox"/>	<input type="checkbox"/>
Dolphin swimming/watching <sub>2</sub>	<input type="checkbox"/>	<input type="checkbox"/>
scenic flights / whale watch flights <sub>3</sub>	<input type="checkbox"/>	<input type="checkbox"/>
Peninsula walkway <sub>4</sub>	<input type="checkbox"/>	<input type="checkbox"/>
seal swimming <sub>5</sub>	<input type="checkbox"/>	<input type="checkbox"/>
seal colony <sub>6</sub>	<input type="checkbox"/>	<input type="checkbox"/>
Walking on the inland tracks <sub>7</sub>	<input type="checkbox"/>	<input type="checkbox"/>
Kaikoura information centre <sub>8</sub>	<input type="checkbox"/>	<input type="checkbox"/>

Other (specify) \_\_\_\_\_

12) Do you *plan* to visit any of the above (? In the second column)

Has the weather affected activities? Y / N

13) What size is the group you are with?

14) Who are they?

- 1. Visiting alone
- 2. Partner/ spouse
- 3. Friends
- 4. Family
- 5. Friends & partner/ spouse
- 6. Friends & family
- 7. Business associates
- 8. Special interest group

15) While on the Kaikoura coast, how much money have you & your group spent on:

* = estimated in advance	Ind'l	group
Accommodation		
Petrol and Oil		
Food at restaurant or takeaways		
Souvenirs/ gifts		
Other household/ personal supplies		
Activities: (specify/ circle) e.g. Whalewatching, flights, dolphin swims, seal swims		
Other (specify)		
Assessment of estimates: P or G?		

16a) Have you visited Kaikoura before for more than 2 hours?

- 1. No
- 2. Once before
- 3. 2-3 times
- 4. 4 or more times

16b) Do you plan to return to Kaikoura (circle)?

- 1. Yes
- 2. No
- 3. maybe

17) Would you recommend Kaikoura to your friends (circle)?

- 1. Yes
- 2.No
- 3. Maybe

18) 1. Male 2. Female

19) What age group are you in?

- 1. 15-19
- 2. 20-24

- 3. 25-29
- 4. 30-34
- 5. 35-39
- 6. 40-44
- 7. 45-49
- 8. 50-54
- 9. 55-59
- 10. 60-64
- 11. 65-69
- 12. 70+

20) (if from New Zealand) What is your highest educational qualification?

- 1. Some high school
- 2. School Certificate (≥ 1 subject)
- 3. 6th from certificate/ UE (≥ 1 subject)
- 4. Higher school or leaving cert.
- 5. University bursary/ scholarship
- 6. Trade certificate
- 7. TOPS or similar
- 8. University degree / polytech/ teachers college/ nursing
- 9. Other (please specify)

REFUSALS?			
Where are you from?	No. of nights	Age group	sex (m/f)





