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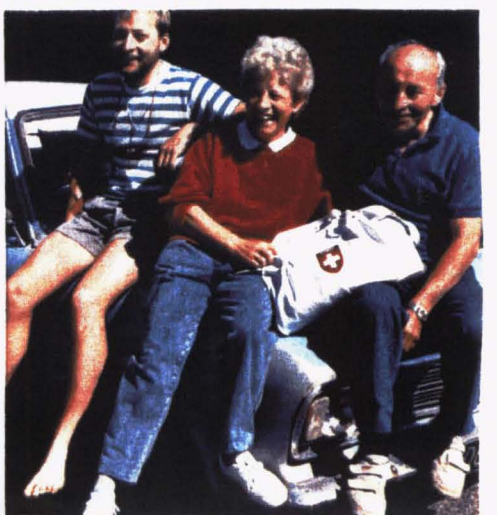
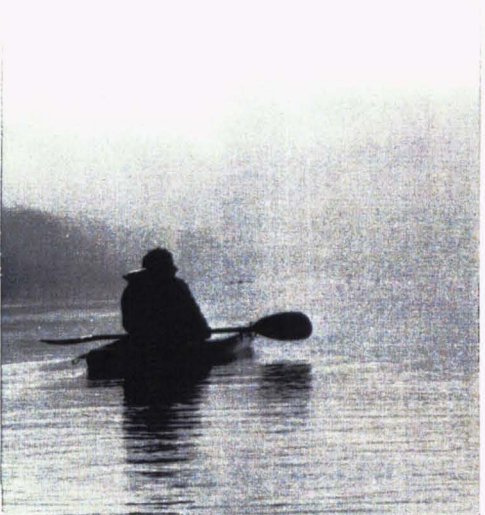
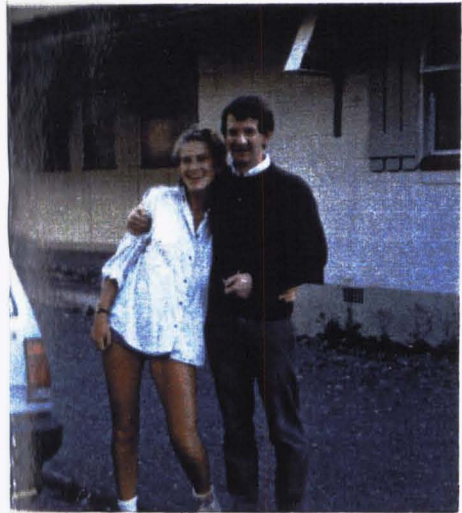
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**FREE INDEPENDENT TRAVELLERS :
THE UNKNOWN TOURISTS.**

A thesis submitted in partial fulfilment of
the requirements for the degree of
Master of Applied Science
in the
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by
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ABSTRACT

The purpose of this study is to describe and examine the tourist market segment of inbound holiday visitors to New Zealand who choose to travel without pre-booking their holiday. These travellers are known as Free Independent Travellers (FITs). They are considered to be a growth segment, but there is little known of their activities in New Zealand, who they are or why they choose to travel independently. Information about travellers and FITs in particular was collected through exit interviews at New Zealand's largest ports (Auckland and Christchurch international airports) during February and March 1988. As well as containing a description of holiday characteristics, demographic characteristics and lifestyle profiles of FITs, the results of the study indicate that :

- 1) some demographic and holiday characteristics are significantly associated with an independent travel style,
- 2) segmenting FITs using lifestyle identified five segments which were given descriptive names of, Sports People, Budgeters, Gregarious, Family Oriented and Comfort Seekers. Each lifestyle is associated with particular demographic and holiday characteristics consistent with their central life interest.

This market research information could be utilised by tourism planners involved in designing suitable products and services for independent travellers.

Key words: FIT, tourism, New Zealand, market segment, independent, lifestyle.

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Chapter 1

Introduction

Currently in New Zealand there is debate concerning the inbound section of the tourism industry. One of the trends observed is a change in type of holiday taken by international visitors. There has been a move away from pre-arranged itinerary holidays, such as coach tours, to more flexible holidays where little or none of the holiday has been booked prior to arrival in New Zealand. Travellers who choose an independent travel style are known as Free Independent Travellers (FITs).

'This is the tourist who arrives at Auckland Airport from overseas, and then vanishes. The tourism industry has no trace of where he (sic) goes or what he does while in the country.

Such visitors are not new but their number is growing every year, posing more uncertainties in an uncertain time for the industry.

The Auckland Visitor Centre is finding that it spends an increasing amount of time with visitors who arrive off an aircraft without a single advance booking in this country.

Even when they arrange travel to the likes of Rotorua they leave their accommodation until they get there.' (Mysterious visitors... 1988)

FIT is a vague term used by New Zealand commercial tourism organisations to describe any traveller who is not on a package tour. Other expressions used are freewheelers, self-caterers, wanderers, off-beat travellers, explorers, unstructured travellers and footloose travellers. The acronym FIT has several different meanings. Internationally, the letters FIT stand for :

- *Foreign Independent Traveller* (Lundberg 1985),
- *Foreign Independent Tour* (Metelka 1986),
- *Frequent Independent Traveller* (Towell and Sheppard 1985) and
- *Foreign Individual Travellers* (Ivory 1982).

The definitions above do not define the term FIT as it is understood in New Zealand. Within New Zealand the definition is also confused. While it is understood that FITs are visitors who make their arrangements at the last opportunity, there is no

agreement on other aspects; whether they are domestic or international visitors, on holiday, or on business.

For this study, FITs are defined as inbound holiday visitors who pre-arrange less than twenty percent of their itinerary before they arrive in New Zealand. For example an Australian resident on a ten day holiday in New Zealand who has booked only the first night's accommodation before arriving in New Zealand would be considered a FIT.

No studies specifically on FITs have been found. While there are no empirical data, some New Zealand publications have stated a growth of the FIT market. In a discussion paper by Cullwick (1984) important changes in Australian tourists' relationship with New Zealand were identified. One of these was the preference of Australian tourists to emphasize 'free-independent-travel' compared with the traditional package tour approach. Glentanner Park (1986), a development study proposing tourist accommodation at Glentanner Station, includes a chapter discussing tourist market demands and projections. The report suggests FIT travel will increase in New Zealand.

The increase in numbers of FITs is creating planning problems for tour operators. In the past the tourist market was captive, travellers booking holidays in advance ensured that coach companies, hotels and motels, restaurants, and other tourist operations could prepare for the expected number of arrivals. Now as the number of FITs has increased and the percentage of travellers on pre-arranged itineraries has decreased, catering for expected tourism demand has become more difficult for managers.

Market segmentation based on holiday style is a recent research approach. In this thesis the market segment of holiday travellers who travel free and independently to New Zealand is investigated. Chapter 2 is a review of literature which discusses the growth and motives of independent travel, and methods of travel research. A model, detailed in Chapter 3, linking lifestyle, demographic and holiday characteristics was used as a basis for an interview schedule. Information about FITs was obtained by interviewing a sample of FITs on their departure from New Zealand. Results of interviews are presented in Chapters 4 through 7. The results indicate that FITs, as well as choosing a particular travel style have common demographic and holiday characteristics. Chapter 5 describes FITs, including holiday details, demographic characteristics and lifestyle patterns. The FIT sample was further segmented on the basis of lifestyle. Descriptions of the segments, Sports People, Budgeters, Gregarious, Family Oriented and Comfort Oriented, are

contained in Chapter 6. Each lifestyle type is associated with particular holiday and demographic traits. Reasons for travelling independently are discussed in Chapter 7. Chapter 8 concludes the thesis by summarising the results and discussing how this market research information may be of use to planners involved with the tourism industry.

Chapter 2

Literature review

2.1 Introduction

Scientific information about tourism is found in economic, anthropological, geographical, sociological, psychological and management literature. The typology, independent FIT versus pre-arranged package holidays, as used by the New Zealand tourism industry, has not been investigated in any of these disciplines. Therefore, this literature review attempts to explain FITs using a variety of disciplines. Firstly, the need for market research is established. Monitoring of tourist behaviour has shown a change in travel style of many visitors to New Zealand. Market segmentation using travel style and contemporary methods of tourism research are discussed. In conclusion, theories of travel motivation are examined to explain an independent travel style.

2.2 National and regional planning

Tourism has been identified as a likely growth industry for New Zealand. The Town and Country Planning Directorate (1984) suggested a strategy for utilising resources and research promotion and development to further realise the potential of tourism.

Strategic Analysis for Tourism Planning

1. Market research

1.1 Define tourist target populations

1.2 Market segmentation

1.3 Define product market matrix

2. Policy Development

2.1 Impact evaluation

2.2 Positioning analysis

2.3 Policy development

3. Implementation

3.1 Planning and policy sector

3.2 Operating sector

Further interest in planning the tourism industry was researched by Price Waterhouse Associates (1984) who believe that planned, controlled and co-ordinated tourism can be used to assist economic development. Concerns were expressed over planning for growth. They believe the ideal direction is a move to controlled growth which would ensure a boom and bust situation would not occur. A conclusion of the Price Waterhouse Associates report was that market research is necessary before any substantial new investment is made.

Market segmentation is the process of dividing large heterogeneous markets into smaller homogenous segments with similar needs. Frechtling (1986) classified tourist markets into :

- primary markets (the current main business),
- secondary markets (a small proportion of current business) and
- opportunity markets (those remote segments, currently of small numbers but expected to grow).

FITs are an opportunity market. Tourism industry managers may be able to make better use of their resources by taking a consumer oriented marketing approach; identifying the wants and needs of FITs and designing suitable products. Research into a new market is important firstly to establish the needs of the market and secondly to establish the viability of a suitable product. Specific examples of organisations attempting to reach FITs are :

- * Tour operators, who have in the past offered the all inclusive coach tour, are diversifying to attract more travellers. Guthreys Pacific Ltd, formerly Guthreys New Zealand Tours, is moving away from New Zealand coach tours. As part of a new range, Guthreys will be attempting to attract FIT travellers by offering :
 - fly-drive schemes,
 - motor home hire and
 - coach tours based on a more modular structure with shorter stops round either the North or South Island or both islands¹ (Revamped travel... 1988).
- * Glentanner Park (1986) uses the growth of the independent travellers as partial justification for the building of a tourist complex at Glentanner park.

1/ if a traveller booked some of these products before arriving in New Zealand, they may no longer satisfy the criteria for being a FIT

- * The Regent Hotel in Auckland has accommodation catering for the top of the market. Hotel management is interested in attracting FITs (Baird 1985).

It is not only tour operators who are affected by a change in travel style of tourists. Other organisations, such as national park management, have to take into account the changes in travel style in managing their resources. There has been a notable increase in the number of visitors on fly-drive type holidays in Fiordland National Park. While there are no empirical data it has been observed that the visitors are mostly young overseas visitors who want to spend a minimum amount of money on accommodation but want to travel or walk extensively. These independent travellers contribute to the increase in track use and an increase in the demand for camping sites. Fiordland National Park has allowed for this demand with an increase in adventure tourism activities (Department of Conservation 1988).

The FIT market is an unknown segment of the New Zealand tourism market. In New Zealand, there has been no market research of the FIT. While information on current behaviour is desirable, the unscheduled travel pattern of FITs makes monitoring and evaluation difficult. Those organisations who are targeting the FIT market have little knowledge of their clientele.

2.3 Trend towards an independent travel style

Changes in technology, economy and social values have brought about changing travel patterns. While there have been increases in the number of travellers, there have also been changes in their holiday styles, transport forms, accommodation forms and activities.

2.3.1 World-wide trend towards an independent travel style

The modern tourist is increasingly mobile and enjoys greater freedom and independence than tourists of the past (Burkart and Medlik 1981). According to Holloway (1983), increasing car ownership has been the greatest influence on travel habits. Because of the increase in car ownership at home, accompanied by greater flexibility and independence, more people, when away, are demanding independent holidays by car. This trend is most pronounced with the more experienced travellers. Camping and caravan holidays have grown in parallel with car ownership. Americans whose priorities are often freedom in choice of destination and flexibility of movement, were the first to use campervans and caravans (Holloway 1983).

Like Holloway, Roberts (1978) sees the trend towards camping with tents and caravans and away from 'all inclusive' hotel packages. Roberts believes the change in travel style in Britain is due to changing social patterns leading to new patterns in holidaying. Tourists in the 'free-and-easy' 1960s and 1970s rebelled against the constraints imposed by package holidays in general, and the accommodation sector in particular. Set meals at set times gave way to 'eat when you please, where you please and what you please'.

As people have become more accustomed to foreign travel they have turned away from package holidays and towards individual products. Consumer markets have moved away from the mass markets, and into smaller more specialist markets with varying needs and aspirations. Many of the old groupings are no longer relevant as spending power has become more evenly spread amongst demographic groups (Hodgson 1987). Many consumers have satisfied all their tangible product needs and are searching for opportunities for self-expression (Hodgson 1987).

The 1970's was the decade of the package tour. Since then, there has been a downturn in the demand for package holidays. Analysing Northern Europe tourist numbers, there were distinct drops in the demand for package holidays between 1979 and 1980 including a 30 percent drop in Scandinavia and a fifteen percent drop in Germany (Senior 1982).

Tour operators once provided a unique product - transport, accommodation and activities at an exotic destination. Today travel agents sell each of the holiday factors

alone, and tour operators no longer have a monopoly on overseas travel. Travellers can customise their holiday, copying or changing products to meet their particular requirements (Hodgson 1987).

Both tour operators and travel agents have suffered from independently arranged travel (Senior 1982). Hodgson (1987) believes that as tour operators and travel agents widen the combination of choices available, the demand for independent travel will increase.

2.3.2 New Zealand trend towards an independent travel style

New Zealand is considered to be a long haul travel destination for travel from all countries other than Australia and the Pacific. While there is general growth in the numbers of long haul travellers, there are fluctuations in numbers travelling from each country of origin and holiday destination.

In New Zealand the major source of information about inbound tourism is the New Zealand Tourist and Publicity Department (NZTP). NZTP monitors inbound visitor behaviour with a regular study, the New Zealand International Visitors Survey (IVS). Departing travellers are questioned about their demographic characteristics, holiday behaviour, information sources and experiences in New Zealand. Structured interviews are carried out throughout the year at all international airports. Reports are produced annually and give information about :

- the demographic characteristics of international visitors to New Zealand,
- expenditure of visitors,
- information sources used by visitors and
- a regional breakdown of visits to and person nights in each area by market.

In an attempt to ascertain the changes in holiday style, questions on use of package tours have been included in recent NZTP Inbound Visitor surveys. NZTP (1982b) used the question, 'Was any part of your holiday a package tour?' Just over 33 percent answered that all or some of the holiday was, 57 percent replied that none was and the remaining nine percent did not know or did not specify.

The large percentage of respondents not knowing or not answering the question indicates some confusion among respondents as to the meaning of 'package tour'. Even so the results are still considered useful. The proportion in each category varied considerably by country of residence and age-group. Residents from Great Britain and Germany were the most likely to answer that their holiday did not include a package tour; 85 percent and 83 percent respectively. Those aged 25 - 34 and 35 - 44 were the most likely ages not to use a package tour; 68 percent and 75 percent respectively.

Since 1982, NZTP studies have reported slight changes in the percentage of holiday visitors travelling on package tours. NZTP (1987 p92) summarised information from previous reports about use of package tours.

	1982	1984	1986
<i>package tour (all or some)</i>	34%	32%	31%
<i>no tour (none, don't know, not specified)</i>	66%	68%	69%

While there was a small drop in the percentage reporting to have used a package tour between 1982 and 1986 it is unclear if this is a significant decrease or if this trend will continue.

2.4 Research techniques

2.4.1 Demographic versus behavioural research

The collection of demographic data has been the most frequently used method for identifying tourists. There are several reasons for its wide use, including :

- demographics are more readily available than information on why a person chooses a particular holiday,
- demographics are easy to analyse and
- other techniques for identifying travellers are less well known.

Demographic parameters while useful have not effectively delineated market segments. A contemporary method of explaining tourist behaviour is behaviour analysis. In behaviour analysis an attempt is made to explain the reasons behind purchase

behaviour. This behavioural approach has been titled Lifestyle Analysis or Values, Attitudes and Lifestyles (VALS). Lifestyle research is based on Attitude, Interest and Opinion (AIO) inventories. Respondents are asked to rate AIO statements on topics such as camping impact, interest in education and self confidence in order to identify central life interest.

2.4.2 Lifestyle segmentation

Lifestyle analysis has been used in the USA since the 1970's. In a study (Perrault *et al.* 1977), data about AIOs, demographics and holiday behaviour were obtained using a postal questionnaire sent to 2,000 households in the Southeastern and Great Lakes sections of the United States. Respondents were then classified into lifestyle groups based on their AIO inventories.

Five distinct profiles of holiday orientation were identified (Figure 1). Each AIO statement response was numerically scaled. In the figure the mean of each lifestyle type is plotted against the AIO characteristic. The scale ranges from -1.6 meaning negatively interested to 0 meaning neutral to 1.6 meaning highly motivated. For example it can be seen in Figure 1 that the Vacationers scored approximately 1.07 on 'plan ahead traveller'. This is higher than all of the other lifestyles which were in the range from -0.3 to +0.3.

There were differences on general behavioural predispositions, demographics, holiday behaviour and holiday information sources between the lifestyles. The **Campers** comprised almost 28 percent of the total sample. They were interested in travel and sought travel information, but their major holiday interests were economy-oriented. The **Adventurers** (24 percent of total sample) had a relatively low desire for relaxing travel and were more adventurous. The **Homebodies** (twenty percent of total sample) enjoyed relaxing travel but had no interest in vacation travel. They did not seek travel information, were less adventurous and were less likely to travel. The **Vacationers** (seven percent of the total sample) were the most interested in holiday travel and most likely to be opinion leaders about vacation travel. The **Moderates** (21 percent of the total sample) were average in most characteristics, but had a high predisposition to travel and were highly gregarious with regard to their holidays.

Figure 1. Lifestyle profiles (Reproduced from Perrault *et al.* 1977, p218)

PLAN AHEAD TRAVELER
UNDECIDED VACATIONER
COSMOPOLITAN TRAVEL
FIRST CLASS TRAVEL
UP-ON-JONE'S TRAVEL
JET-SETTER
OPINION LEADERSHIP
IMPERSONAL SOURCES
TOUR TRAVELER
INFORMATION SEEKER
MONEY ORIENTED
IMPACT OF CAMPING
VACATION GREGARIOUSNESS
TRAVEL INTEREST
EDUCATIONAL TRAVEL
HISTORIC TRAVELER
FAMILY TRAVEL
SPORTSMAN SPECTATOR
SPORTS PARTICIPANT
FUNCTIONAL GREGARIOUSNESS
VENTURESOMENESS
RELAXING TRAVELER
TENTER TRAVELER
WEEKEND TRAVELER
ECONOMIC TRAVELER
TRAVEL PREDISPOSITION
CAMPER TRAVELER
SELF CONFIDENCE

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In general, the data supported the concept that lifestyle is the pervasive factor in understanding travel habits. The lifestyles imply central life interests; for example the Adventurers seek adventure in everything they do not just travel. Conclusions of the study were that those leisure time activities which are to be successful, must be consistent with the needs and interests of the people they serve.

2.4.3 New Zealand lifestyle research

Market segmentation based on AIO inventories has been utilised in some New Zealand studies. NZTP (1985a) is an attitudinal and behavioural segmentation of Australian residents for travel and leisure products. Country of origin, Australia, is the primary segment and sub-segments were identified by clustering attitudes, behaviour and demographic variables.

In 1986 at a tourism research forum held in New Zealand, Pyszka spoke on VALS (Pyszka 1987). Pyszka proposed that people who have the same demographic characteristics can differ substantially in their travel patterns. Pyszka believes segmentation using VALS is a more effective basis for looking at travel markets, designing travel products and promotions. One of the recommendations of the tourism forum was that motivational, psychographic and attitudinal data were needed as part of international visitor information in New Zealand (Pyszka 1987).

Roberts (1981) examined holiday patterns of Australians in New Zealand. An increase in the number of Australians visiting New Zealand had been predicted using an economic model. When the actual numbers fell, Roberts proposed that social factors play a greater role than previously realised in holiday destination choice. Instead of the traditional approach of using country of origin as a method of segmentation, Roberts suggested tourism market segmentation on the basis of lifestyle and benefits desired from the holiday.

'The underlying assumption is that by identifying the kind of holiday experience (benefits) people seek and understanding their lifestyle, we will be better able to match them to the lifestyle products which New Zealand has to offer. We will therefore be better able to attract the kind of people to which such a holiday would appeal. This form of segmentation is cross-national and cross-cultural. It is a departure from the geographic 'country of origin' and 'reason for visit' market segments which are commonly used in New Zealand.'
(Roberts 1981, p52)

In a later report, Roberts and Henshall (1982) detailed variables which may relate to tourist patterns. These variables are illustrated in Table 1.

Table 1. Tourism segmentation approach

<i>'Who are they?'</i>	<i>'What do they do?'</i>	<i>'Why they do it?'</i>	<i>'What motivates them?'</i>
<u>Objective</u>	<u>Objective Consumer</u>	<u>Inference</u>	<u>Benefit Characteristics.</u>
<u>Demographic/</u>	<u>behaviour.</u>	<u>Characteristics.</u>	<u>attitudes, perceptions,</u>
<u>Geographic</u>	<u>'products used',</u>	<u>personality, attitudes,</u>	<u>preferences, benefits</u>
<u>Characteristics</u>	<u>frequency of use,</u>	<u>interests, opinions,</u>	<u>sought, values.</u>
<u>age, nationality,</u>	<u>expenditures,</u>	<u>lifestyle preferences.</u>	
<u>occupation, sex, income,</u>	<u>seasonality, mode of</u>		
<u>region, city size, socio-</u>	<u>transportation and</u>		
<u>economic status,</u>	<u>accommodation.</u>		
<u>education level, family</u>			
<u>lifestyle stages.</u>			

2.5 Motivations

Motives are important factors in explaining tourist behaviour. Tourists' motives will be reflected in their expectations and may be observed in their holiday behaviour. Tourist behaviour can be categorised using numerous typologies. Smith (1977) examined some typologies including 'packaged and programmed' tourism versus 'individual' tourism. FITs would be Smith's 'individual' tourists and 'packaged and programmed' would be those tourists on pre-arranged holidays.

2.5.1 Inner directed people

From a commercial perspective, Cullwick (1984) recognised the importance of understanding consumer lifestyles for successful marketing programmes of specific products and services. People from Western societies are placing greater emphasis on values of self or 'inner-directed' activities compared with 'outer-directed' activities than they have in the past. These value shifts are equated with greater individual concern for self-fulfillment and development. Modern society has strongly supported this individualism and quest for self-expression and introspection (McIntosh and Goeldner 1986). International travel is an important aspect of these trends. Inner-directed people like to share in the life-style of the country they visit. In 1960, 'inner-directed' people made up only two percent of Americans but by 1980, this had increased to 21 percent of the population (Henshall 1981).

2.5.2 Intrinsic motivations

Travel has intrinsic motivations; there are no physical rewards to be achieved once the travel has finished, any rewards are in the activity itself. Iso-Ahola (1981) believes that travel, like other forms of free time will not be leisure if there is some extrinsic inducement. For recreational travel to be rewarding, it must be intrinsically motivated. The individual must choose the activities from which he/she derives satisfaction. A voluntary component is necessary for an activity to be intrinsically rewarding.

'Certain factors can turn intrinsic motivation into extrinsic motivation, the single most important factor is a sense of freedom about the initiation of one's travel behaviour. Perceived freedom is a critical prerequisite for leisure activities to become intrinsically motivated. In other words, a person must have freedom to choose his (sic) activity initially to enjoy it.' (Iso-Ahola 1981, p118 - 119)

Coach tours may be disregarded as a holiday option because once chosen, participation in activities of the itinerary is required forming extrinsic motivation.

2.5.3 Social interaction

Another proposal is that people choose a particular holiday to satisfy their social motivations. Social interaction is central to tourism. Marsh and Henshall (1984) believe that holiday style is based on the degree of contact the holiday maker wants with the people at the destination. The traditional holiday style is Separatist, the tourist choosing to separate from normal daily activities and people, rather choosing an artificial environment, such as resort holiday or package tours. Other holiday styles have been named Involuntary Participants, Voluntary Participants and Integrationists. All the Voluntary Participants and some of the Involuntary Participants and Integrationists would be considered FITs because they do not pre-book their holiday before arriving in New Zealand.

The holiday characteristics of these social interactive types are :

- * transport - rental cars, campervans, public transport, hitch-hiking, private cars of locals,
- * accommodation - motels with self-catering, camp grounds, farm stays, home hosting, bed and breakfast, Youth hostels, locals homes and
- * activities - domestic tourism centres, beaches, farms, national parks, local entertainments.

Holidays taken by socially interactive types will be longer than average and more decentralised. Henshall and Marsh (1981) believe that interest in interactive experimental tourism appears to be growing.

2.5.4 Change versus familiarity

International tourists are predominantly from developed westernised countries with sophisticated and structured lives. They go on holiday in order to escape the place, the people and the routine of their normal lives. Even though they desire novelty, travellers are curbed by a need to reduce uncertainty to a minimum.

Of travel styles available, inclusive tours are popular for those who crave security (Wahab 1975). In contrast FITs, rather than fear the unknown, thrive on it. Buryl (1983) believes that a lack of planning frees a traveller from the illusion that life can be controlled, and allows freedom to be a positive influence.

Plog (1974) linked personality types with holiday destinations and proposed a travel urge continuum, from stay-at-homes to explorers. At one end of the continuum are the outgoing, curious and adventurous types who seek out the little known destination and forego the familiar and the popular. Plog labelled these people 'Allocentrics' (other oriented). Allocentrics are adventuresome and are likely to be among the first to try new products and services. But they are also pragmatic and practical so that gimmicks do not appeal to them and products must have inherent worth. The other extreme of the continuum is the 'Psychocentric' (self centred) who is concerned with little problems, with themselves and are generally anxious and non-adventurous.

Plog developed the theory to explain the popularity of a destination as a cycle relating to the personality types of visitors. As a destination becomes more commercialised it loses its authenticity and those qualities which initially attracted the allocentrics. It moves down the scale, becomes more mundane and thereby appealing to the less adventuresome psychocentrics. Those characteristics which Plog (1974, p57) associated with allocentrics and psychocentrics, are listed below.

Psychocentrics

- *prefer the familiar in travel destinations,*
- *like commonplace activities at travel destinations,*
- *prefer sun'n'fun spots, including considerable relaxation,*
- *low activity level,*
- *prefer destinations they can drive to,*
- *prefer heavy tourist accommodations, such as heavy hotel development, family type restaurants, and tourist shops,*
- *prefer familiar atmosphere (hamburger stands, familiar type entertainment, absence of foreign atmosphere),*
- *complete tour package appropriate, with heavy scheduling of activities.*

Allocentrics

- *prefer non-touristy areas,*
- *enjoy sense of discovery and delight in new experiences, before others have visited the area,*
- *prefer novel and different destinations,*
- *high activity level,*
- *prefer flying to destinations,*
- *tour accommodations should include adequate-to-good hotels and food, not necessarily modern or chain-type hotels, and few 'tourist' type attractions,*
- *enjoy meeting and dealing with people from a strange or foreign culture,*
- *tour arrangements should include basics (transportation and hotels) and allow considerable freedom and flexibility.*

On a nation-wide study in the United States, Plog (1974) found the population to be normally distributed for allocentricism to psychocentricism, with few at the extremes and most near the middle. In 1974, Plog suggested suitable holiday destinations according to personality types for Americans as illustrated in Figure 2. While New Zealand is not specified, it would be included in the South Pacific category. Plog believed that only the strongly allocentric person from the USA would have been likely to holiday in New Zealand in 1974.

Figure 2. Personality types and holiday destinations (Reproduced from Plog 1974, p58)

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2.5.5 Familiarity with destination cycle

In the Glentanner Park report (1986) a cycle of tourist styles was suggested. Travellers from any one source country generally change their characteristics in an evolutionary fashion. In the early stages of tourism visitors predominantly travel on pre-arranged coach tours. As time passes, the familiarity with the destination increases and travellers come as FITs.

Glentanner Park (1986) believes this cycle has occurred in New Zealand with Australian visitors and is also expected to occur with North American and Japanese visitors. This hypothesis may explain some of the current changes in travel flows. Accommodation forms required by travellers differ according to their travel style. This aspect should be taken into consideration for tourism planning in New Zealand.

Plog (1974) and Glentanner Park (1986) agree that there are cycles in travel style for a particular destination, but disagree on the reasons. Plog (1974) suggested a holiday destination is first visited by the adventurous independent allocentrics and later when the area has developed into a resort is overtaken by the psychocentrics. In the Glentanner Park (1986) the reverse is believed; that the coach tours establish a holiday site. Later travellers having heard about the area and knowing the area is safe will choose to travel independently.

2.5.6 Travel is freedom

As a form of leisure, travel should involve some freedom of choice. Iso-Ahola (1981) believes that if a person feels that participation is required in certain activities, then such forms of free time are not leisure. If a person is put under surveillance or given a deadline by which to finish an activity, interest and enjoyment markedly decrease and may cease altogether.

'Freedom is the ability to make one's own decisions about a course of action.'
(Krippendorf 1987, p27)

Like many leisure activities, tourism offers an escape from work, home, routine and boredom. Instead of being pressured into doing certain activities at certain times and with specific people, holiday makers can determine for themselves the components and pace of the holiday. For a short time people can have control over their activities. An individual can withdraw from the strains and pressures of urban living in an unreal holiday destination. This self-determination may be the most important factor of independent travel.

Chapter 3

Method of enquiry

3.1 Objectives for this study

The purpose of this study is to investigate the market segment of Free Independent Travellers to New Zealand. This will provide tourism planners with information about FITs, a growth opportunity market of whom relatively little is known. The model (Table 2) used is based on research of Roberts and Henshall (1982) and Perrault *et al.* (1977).

Table 2. Model for FIT study

Holiday behaviour	Demographics	Lifestyle
<i>What do they do?</i>	<i>Who are they?</i>	<i>What motivates them?</i>
Holiday preparations - bookings, group type, purpose of holiday, information source, equipment brought. Holiday in New Zealand - length of stay, transports, accommodations, activities, travel guide, travel passes, destinations, whom spent time with, food, highlight, expenditure. Total holiday - other countries visited, length of holiday. Holiday satisfaction - hindsight, problems.	age, sex, residence, occupation, repeat visits, income, education, marital status, urban/rural residence, English ability, previous overseas travel.	Attitudes, interests and opinions. Holiday preferences.

Specific research objectives are :

- (A) Establish if demographic and holiday characteristics differ with travel style. This will answer the question 'Are FITs different from inbound holiday visitors in terms of demographic characteristics and holiday behaviour?' (Chapter 4)
- (B) Describe FITs using the model as given in Table 2 (Chapter 5).
- (C) Use lifestyles as the criteria for segmentation the FIT market into sub markets (Chapter 6).

3.2 Definition of terms

Tourists are defined as residents of any country other than New Zealand, aged fifteen years and over who holiday in New Zealand for more than one night and less than one year. NZTP uses the term 'inbound holiday visitor'. In this study the single word 'Tourist' is used so that the text is simpler.

FITs are a segment of the Tourist group. As well as fulfilling the criteria for being tourists they must also be considered free and independent, meaning that they are not being restricted to a fixed itinerary. They cannot be limited by pre-arranged bookings for accommodation, transport or activities. In this study, FITs are defined as Tourists who do not book more than twenty percent of their holiday before arrival in New Zealand.

Country of residence is the country in which a person has last lived for twelve months or more.

Tourism is full of idioms. In Table 3 those terms used in this report are listed with others which are often encountered in tourism literature.

Table 3. Idioms

Used in this report	Other terms with similar meanings
holiday	vacation
demographics	socio-economics, socio-demographics
camp ground	motor camp
campervan	motor home, mobile homes
tramping	hiking, bush-walking, trekking
backpack	rucksack, pack

3.3 Research design

The objective of this study is to gather information about Free Independent Travellers (FITs) who have visited New Zealand. Information was obtained from two sources :

- Study A) Structured interviews of Free Independent Travellers (carried out by the author) and
- Study B) Structured interviews of Tourists (utilising existing data from the International Visitors Survey data carried out by NZTP).

Both sets of interviews were carried out at international airport departure areas in February and March 1988. Passengers were approached after they had completed initial check in procedures and before the final boarding call for their flight. Stratified random sampling was used in both studies so that passengers from all major airports, airline, flight times and flight destinations were included.

3.3.1 Study A. FIT interviews

The sample

The FIT population was independent holiday visitors to New Zealand aged fifteen and over who departed New Zealand in February and March 1988 from either Auckland or Christchurch international airports. Every third person who passed a particular place in the departure area was approached. FITs were identified from other travellers by asking the following questions :

- Are you a New Zealander?
- Have you been on holiday in New Zealand?
- Are you at least fifteen years old?
- Was your stay in New Zealand more than 24 hours and less than one year?
- Did you pre-arrange any of your holiday before you arrived in New Zealand?

If the traveller approached fulfilled the criteria for being a FIT, they were then asked to participate in a structured interview which lasted approximately twenty minutes. Over the two month period, 267 interviews were obtained.

The sample was stratified by airport of departure in order to reduce bias. In the year ended March 1987, approximately 75 percent of travellers used Auckland and 25 percent used other ports (Department of Statistics 1987). So the study would be proportionally correct, 200 (75 percent of 267) interviews were carried out at Auckland airport. Christchurch airport, the next largest port was used for the remaining 67 interviews.

Interview schedule

Structured interviews were used for two reasons. Firstly in order to be comparable with NZTP studies and secondly because interviews have proven to gather high quality data and have a good response rate.

The interview schedule is given in Appendix A and was based on the model (Table 2). Section headings are holiday behaviour, demographics characteristics, lifestyle and holiday preferences and holiday satisfactions. Those questions in Study A which gain similar information to Study B have been marked with an *. An important consideration of interview questions was that they could be answered by people from different cultures

and with different levels of English ability. A constraint on the interview schedule was that the total interview would not take longer than 20 minutes for the average person.

The interview schedule was pre-tested in December by interviewing travellers staying at the YHA hostel in Christchurch. In order to assess the suitability of the interview schedule, a pilot study was carried out at Christchurch airport in the last week of January 1988. After the pilot test, some questions were amended and a further question added. The amendments involved changing some answer categories. A question relating to purpose of visit was added.

Limits of randomness

While it was intended to randomly select travellers for the FIT study, in reality this was not possible because of the following :

- There is a small seasonal bias by airport. The interviews in February and early March were in Auckland while those in mid and late March were in Christchurch.
- Passengers who had at least forty minutes before the plane was due to depart were the only people approached. The forty minutes was necessary to complete a twenty minute interview before the final departure call for the flight, which was announced twenty minutes before scheduled departure. The majority of travellers did not move to the departure gates until after this time.
- Usually only one person was interviewed per plane load. Although 747s have double the capacity of 767s, boarding time is the same. As there was only one interviewer, it was only possible to interview one person per flight.
- No interviewing was attempted during major airport disruptions; for example, weather delays and airport staff strikes.
- The interviewer did not communicate the full interview in any language other than English. Interviews, with travellers who could not complete the initial questions, were stopped and they were recorded as unable to complete interview. Only 24 of the 1,565 travellers approached for interviews could not or would not participate in the interviews (Appendix B).
- First class passengers were unlikely to be approached. As first class passengers wait in different lounges there was insufficient time to complete an interview in the departure area.

It is not likely that any of the above limitations would be detrimental to the study or the goal of interviewing a cross-section of FITs.

3.3.2 Study B. Extract of IVS interviews

NZTP's International Visitors Surveys collect information about international visitors. Within the interview schedule, it is possible to separate holiday visitors from visitors in New Zealand for other reasons but not possible to separate FITs from non-FITs. For this study, NZTP staff extracted demographic and holiday data of holiday visitors who departed New Zealand in February and March 1988 only. This extract of information is called Study B in this thesis.

The Sample

The population was holiday visitors to New Zealand aged fifteen years and over who departed in February and March 1988. Study B contains information obtained from 842 interviews. Further details of sampling methods may be obtained from NZTP Head Office in Wellington.

Interview schedule

The interview questions used related to holiday characteristics (length of stay, holiday expenditure, travel group) and demographic characteristics (age group, sex, occupation, repeat visits) of Tourists. Those questions which were used to obtain similar information from FITs have been marked with an * in Appendix A.

3.3.3 Limitations

The research was limited to a study of tourists who left New Zealand in February and March 1988. This is late summer in New Zealand and after the school holidays have ended. Hence the study contains seasonal bias.

At this particular time, world events which may have effected travel patterns were:

- the Winter Olympics held in Calgary, February 1988,
- the military coup in Fiji in 1987 disrupted flights across the Pacific Ocean, and
- Expo 88 in Brisbane was due to begin in May 1988.

Within New Zealand, over the interview period, the following may have influenced results :

- Cyclone Bola caused bad weather in the North Island,
- the World Bowls Competitions were held in Auckland in February,
- Wellington's cable car was closed for repairs and
- the New Zealand dollar was strong in comparison with the Australian and American currency, being worth approximately 93 Australian cents or 67 American cents. Therefore travellers using foreign currency received less New Zealand dollars than they may have anticipated.

The events listed above are not considered abnormal. They are included to give a perspective of national and world events which were occurring at the time of the study.

3.4 Data processing techniques

Most questions in the FIT interview schedule and the IVS interview schedule are multi-choice. Several of the FIT study questions are open-ended and responses were coded after the interviews were completed. Study B data were obtained from NZTP. Data from 846 Tourists extracted from the January to March 1988 International Visitors Survey were already coded.

Quantitative analysis was carried out using SAS (Statistical Analysis System) on a VAX mainframe at Lincoln College. Graphics were produced with Lotus (a spread sheet package) on micro computer.

As well as common descriptive statistics, bi-variate and grouping analysis techniques were utilised. Generally numbers were rounded to one decimal place and money was rounded to the nearest New Zealand dollar.

Bi-variate analysis, Chi-square test

Relationships were tested with Chi-square statistics. Chi-square is a measure of difference between observed and expected values under specific hypothesis. The null hypothesis is that there is no difference between categories and the alternate hypothesis is that at least one category is different from the others. The measure of difference (χ^2) is weighted for the number of categories considered, degrees of freedom (d.f.). The observed χ^2 is compared with a table of theoretical values assuming the null hypothesis to be true. In this study, if the probability was low (< 0.05) this was taken as evidence that the null hypothesis was false, and the alternate hypothesis was accepted.

Grouping analysis, clustering method

To identify FIT observations with similar characteristics, cluster analysis was used. The method examines a matrix of intercorrelations in order to classify variables into groups or clusters. Each cluster consists of variables that correlate highly with one another and have comparatively low correlations with other clusters. Specifically, SAS Fastclus procedure was used in this study to allocate FITs into groups with similar characteristics. The Fastclus procedure performs a disjoint cluster analysis on the basis of Euclidean distances computed from quantitative variables. For each clustering application, the number of clusters was set to give maximum detail while ensuring that each cluster contained at least ten percent of the sample.

3.5 Response rate

In the FIT study, a total of 1,565 travellers were approached. Of these :

- 267 were FITs,
- 24 refused or spoke insufficient English to complete the interview,
- 556 were holiday visitors (Tourists) who had pre-booked more than twenty percent of their holiday and
- 718 were either New Zealanders, children (under fifteen years old), transit passengers or not holiday visitors.

Of the 1,565 travellers approached, 1,541 were willing to co-operate with the study, giving a response rate of 98.7 percent. The daily counts of those approached is given in Appendix B. The high response rate would indicate that the results are highly representative of departing travellers in February and March 1988.

Chapter 4

Objective A. Characteristics associated with a free independent travel style

4.1 Introduction

This chapter deals with Objective A of this study; testing if characteristics are associated with a particular travel style. By definition, FITs are special in that they choose a free and independent travel style. However travel style is not an easily identifiable characteristic. A previous study (NZTP 1982b) found that a package holiday style was associated with demographic characteristics. The question which follows is 'Are any particular characteristics associated with a free and independent travel style?'

Comparisons could only be made of those characteristics which are in both sets of interviews. Study B collected amongst other details, holiday behaviour and demographic information from Tourists visiting New Zealand. This information relates to holiday behaviour (length of visit, travel group type and size, holiday expenditure, daily holiday expenditure) and demographic characteristics (age, sex, country of residence, occupation, repeat visiting) of holiday visitors departing New Zealand in February and March 1988. In Study A the same questions were asked specifically to FITs. Bi-variate analysis of the data from the two studies is used to establish if demographic and holiday characteristics differ between the two groups. There were 846 Tourists interviewed for the IVS study, and 267 FITs in the FIT study. The studies were both carried out in February and March 1988.

Differences in both demographics and behaviour would be useful to planners because they would :

- identify behaviour patterns to ascertain if FITs are a desirable market to encourage and
- identify demographics of FITs so that they can be targeted prior to their holiday.

4.2 Holiday characteristics associated with a free independent travel style

4.2.1 Comparison of length of visit of FITs and Tourists

FITs visit New Zealand for long holidays in comparison with Tourists. In Table 4 the percentage of FITs and Tourists in each length of holiday category is shown.

Table 4. Percentage share of length of stay of FITs and Tourists

Length of stay (days)	FITs (%)	Tourists (%)
1 - 7	6.7	32.5
8 - 14	17.6	22.3
15 - 31	43.1	26.9
32 - 181	31.9	17.0
182 - 364	0.7	1.3
\bar{x}	33 days	24 days
σ	30 days	38 days

There were significant differences (χ^2 (4 d.f.) = 93.0 $p < 0.01$) between the length of visit of the FIT group and the Tourist group.² The major contributors to this difference were the much lower percentage of FITs staying for 1 - 7 days and much higher in the 15 - 31 day and 32 - 181 day duration.

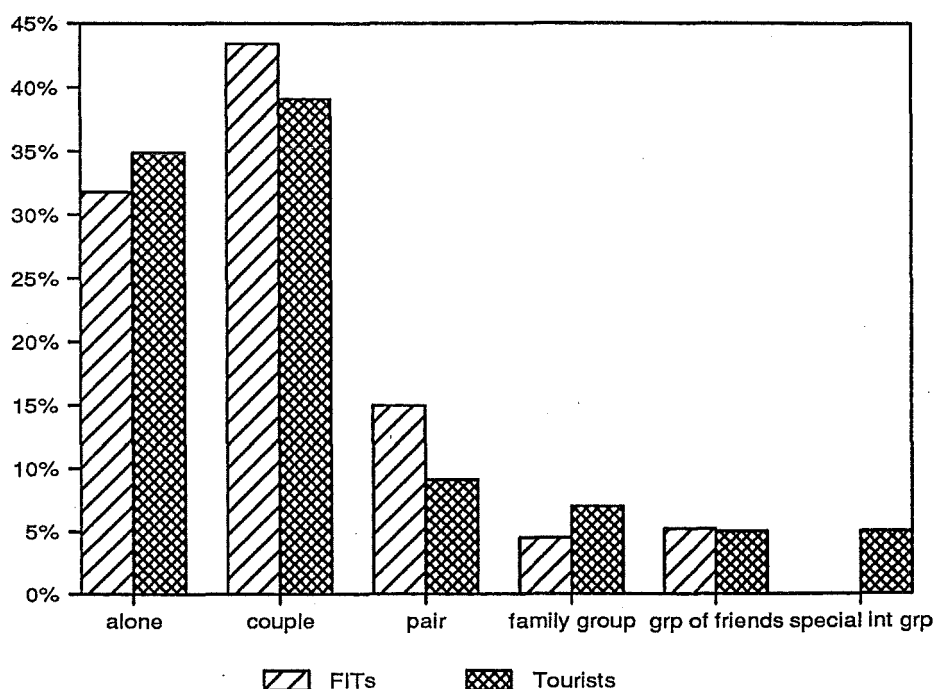
FITs tend to stay longer in New Zealand, with a mean stay length of 33 days compared with Tourists at 24 days (rounded to nearest whole number of days). The distribution in the length of stay for the Tourists was evenly spread. This contrasts markedly with FITs who were predominantly in the 15 - 31 day category. The lower standard deviations (σ) of FITs than Tourists also illustrates the more homogeneous pattern of FITs. For further detail of the length of FITs holidays in New Zealand see Section 5.2.2.1.

^{2/} see Data Processing Techniques, Section 3.4, for description of χ^2

4.2.2 Comparison of travel group of FITs and Tourists

FITs mostly travelled in small groups; couples, pairs and alone. The interview question was ‘Which people if any planned and booked this trip with you and then travelled with you?’ Because of the wording of the question, all group types were possible whether the travel style was independent or pre-arranged. For example, even though a person chose a package holiday, he/she would be classified as travelling alone if he/she had planned and booked the trip alone. In Figure 3 the percentage of FITs and Tourists in each travel type can be seen. To clarify the meaning of some terms, a couple is defined as two people in a heterosexual relationship. A pair is defined as two people in any other type of relationship.

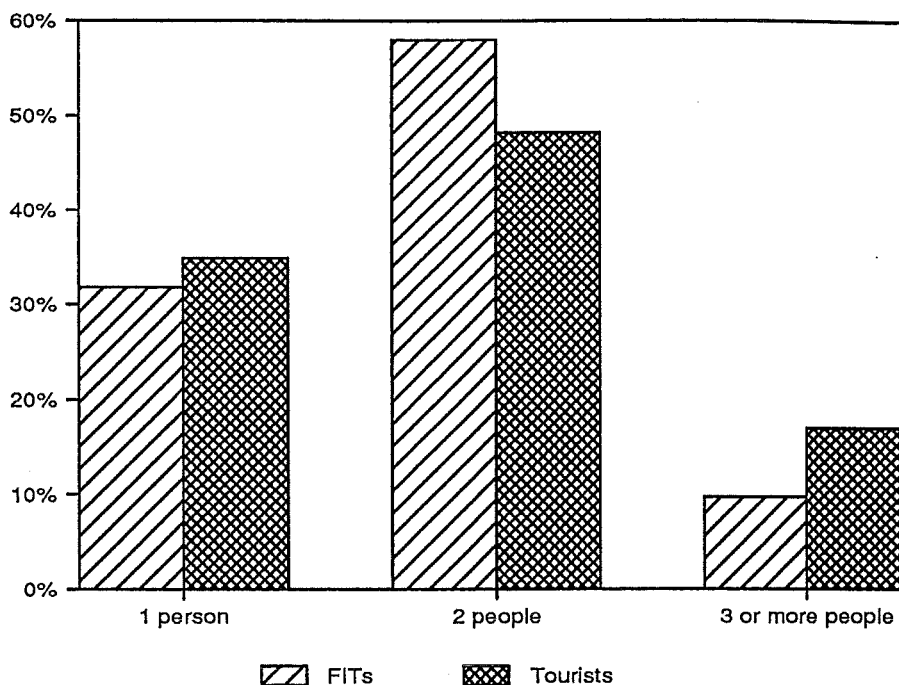
Figure 3. Percentage share of group type of FITs and Tourists



The proportions of each group type of FITs differed significantly from Tourists (χ^2 (5 d.f.)=23 $p<0.01$). The greatest contribution was the percentage in the special interest category. No FITs were in the special interest group while five percent of Tourists were. The χ^2 was repeated excluding the special interest group (χ^2 (4 d.f.)=9.46 $p<0.06$). There were statistical differences at 90 percent confidence but not at 95 percent. FITs

were over-represented in the couple and pair categories and under-represented in family group category.

Figure 4. Percentage share of group size of FITs and Tourists



In Figure 4 the percentage of FITs and Tourists in each of three group sizes, one person (travelled alone), two people (either a pair or a couple) and three or more people (family group, group of friends or special interest group) is shown. The largest single category for travel group size of both FITs and Tourists was two people; 58 percent of FITs and 48 percent of Tourists. The groups were significantly different in terms of size of travel group (χ^2 (2 d.f.)=12 $p<0.01$). The difference is most evident in the group size of three or more at seventeen percent for Tourists and only ten percent for FITs.

FITs were unlikely to be in large groups. Practically it would be difficult for large groups of people to travel together and anticipate that accommodation would be available at short notice. For further detail of group type and size see Section 5.2.1.2.

4.2.3 Comparison of expenditure of FITs and Tourists on New Zealand holiday

Tourists and FITs were asked for the cost of their holiday in New Zealand (all expenditure including anything prepaid, but excluding international travel costs). FITs were moderate in their expenditure during the holiday, with neither the lowest or highest holiday expenditure.

Table 5. Percentage share of expenditure of FITs and Tourists

Expenditure (NZ\$)	FITs (%)	Tourists (%)
0 - 500	9.4	19.1
501 - 1000	21.3	19.3
1001 - 2000	36.7	29.0
2001 - 3000	19.9	15.8
3001 - 4000	7.1	7.0
above 4000	5.6	9.8
\bar{x}	\$1849	\$2008
σ	\$1365	\$2214

From Table 5, it can be seen that the largest single category for expenditure during the holiday of FITs and Tourists was the \$1001 - \$2000 range; 36.7 percent and 29.0 percent respectively). Statistically there were significant differences between the expenditures of the groups (χ^2 (5 d.f.)=23 $p < 0.01$). FITs were unlikely, only fifteen percent (9.4% + 5.6%) to be in the extreme categories, \$0 - \$500 and over \$4000, while almost 30 percent (19.1% + 9.8%) of the Tourists were in the extreme categories.

Holiday expenditure for FITs ranged from \$160 - \$11,600 with a mean of \$1849, and for Tourists from \$18 to \$18,000 with a mean of \$2008. The apparent difference of \$159 between the means of the groups is not significant considering the high variability in holiday expenditure in both groups, the standard deviation of FITs and Tourists being \$1365 and \$2214 respectively.

The daily expenditure was calculated by dividing the total expenditure by the length of stay in New Zealand. On average, the daily expenditure was much less for FITs than for Tourists. The percentage share of daily expenditure of FITs and Tourists is shown in Table 6.

Table 6. Percentage share of the daily expenditure of FITs and Tourists

Daily expenditure (NZ\$)	FITs (%)	Tourists (%)
0 - 50	38.6	29.6
51 - 100	35.6	15.7
101 - 150	16.4	10.4
151 - 200	6.8	17.6
201 - 300	2.6	12.4
301 +	-	13.7
\bar{x}	\$76	\$169
σ	\$52	\$200

While the mean expenditure was not statistically different, the daily expenditure was significantly different between the two groups (χ^2 (5 d.f.)=120 $p<0.01$). The major contributions to the difference were the large percentage (74%) of FITs in the \$0 - \$100 daily expenditure category and the absence of FITs in the over \$300 category.

The daily expenditure for FITs ranged from \$8 to \$260, while the Tourist's daily expenditure ranged from \$1 to \$1,779. The mean daily expenditure of FITs was only \$69, while the Tourists daily expenditure was nearly three times as much, being \$169. The large difference in daily expenditure may be related to the difference in length of stay. While the holidays of FITs cost about the same as Tourists', the money was spent over a longer period.

FITs daily expenditure was fairly consistent in comparison with the Tourists, indicated by the much lower standard deviation. Further details of FITs expenditure is contained in Section 5.2.2.9.

4.3 Demographics associated with a free independent travel style

4.3.1 Comparison of age and sex of FITs and Tourists

A large proportion of FITs are males and aged between 25 and 34. The age structure of FITs differs significantly from Tourists (χ^2 (5 d.f.)=68 $p<0.01$). The major contributors to this difference are the greater percentage of FITs in the 25 - 34 age group and the lower percentage in the over 65 group. FITs are over-represented in the 15 - 34 age groups and under-represented in the 35 and over age groups.

FITs are comparatively young, the average being 24. The FIT results differ from NZTP (1982b) which found that the most likely age group who did not use a package tour were those aged 35 - 44.

The sex ratio of FITs differed significantly from Tourists (χ^2 (1 d.f.)=12 $p<0.01$). Of the 267 FITs interviewed, 174 are male and 93 female. Therefore the male female ratio in the FIT study is 65:35. FITs are more likely to be male than Tourists, whose male female ratio is 53:47.

Figure 5 is a population chart of the FIT group. It shows the percentage of FITs, male and female in each age group. Sixty-five percent of FITs are male and the right hand side of Figure 5 is the breakdown of this 65 percent into each age category. It can be seen that 27 percent of FITs are males aged between 25 and 34, and that 42 percent of all FITs are aged between 25 and 34.

By comparing Figure 5 with Figure 6 (population chart of Tourists), it can be seen that the populations are different. The FIT group is dominated by males in the 25 - 34 year category and there are few females aged over 65. In contrast Figure 6, the Tourists population chart is more even throughout both the age and sex categories. For further details of age and sex of FITs see Section 5.3.1.

Figure 5. Population chart of FITs

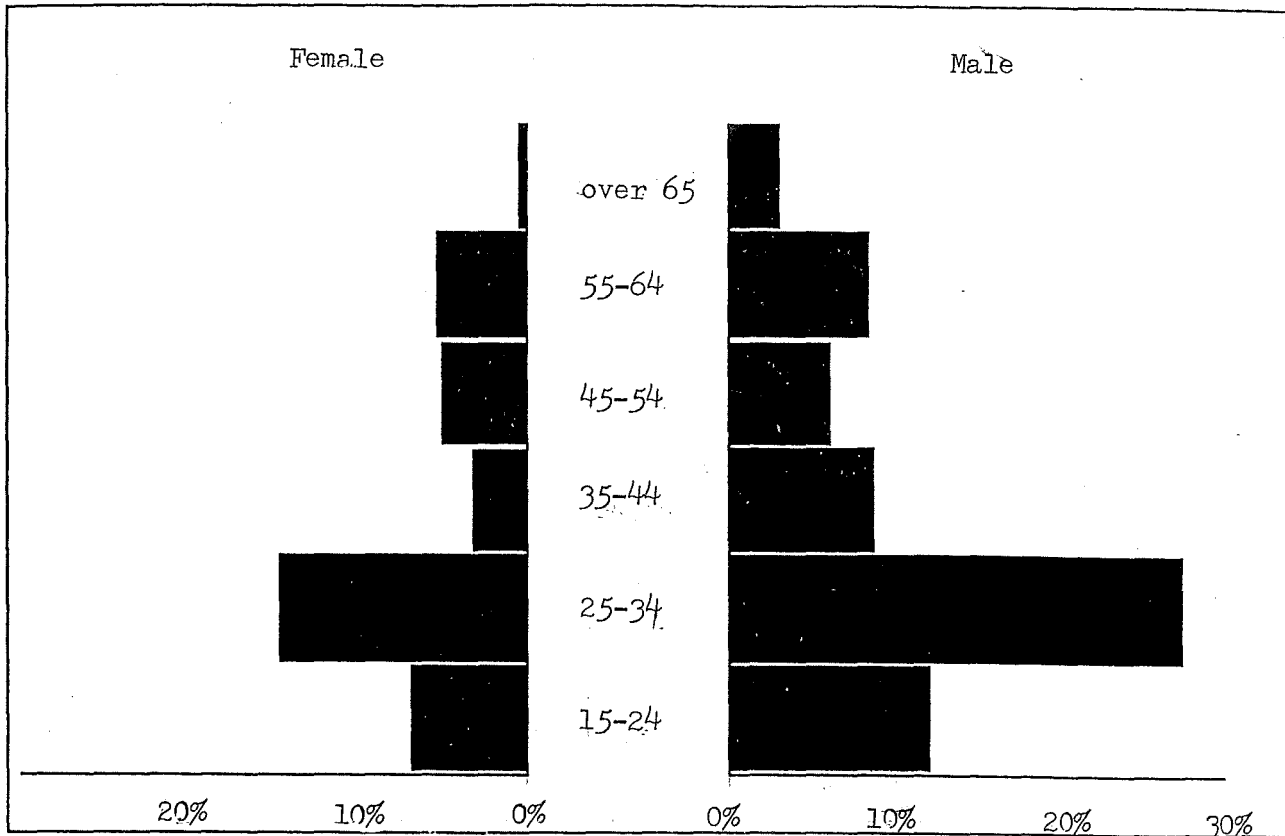
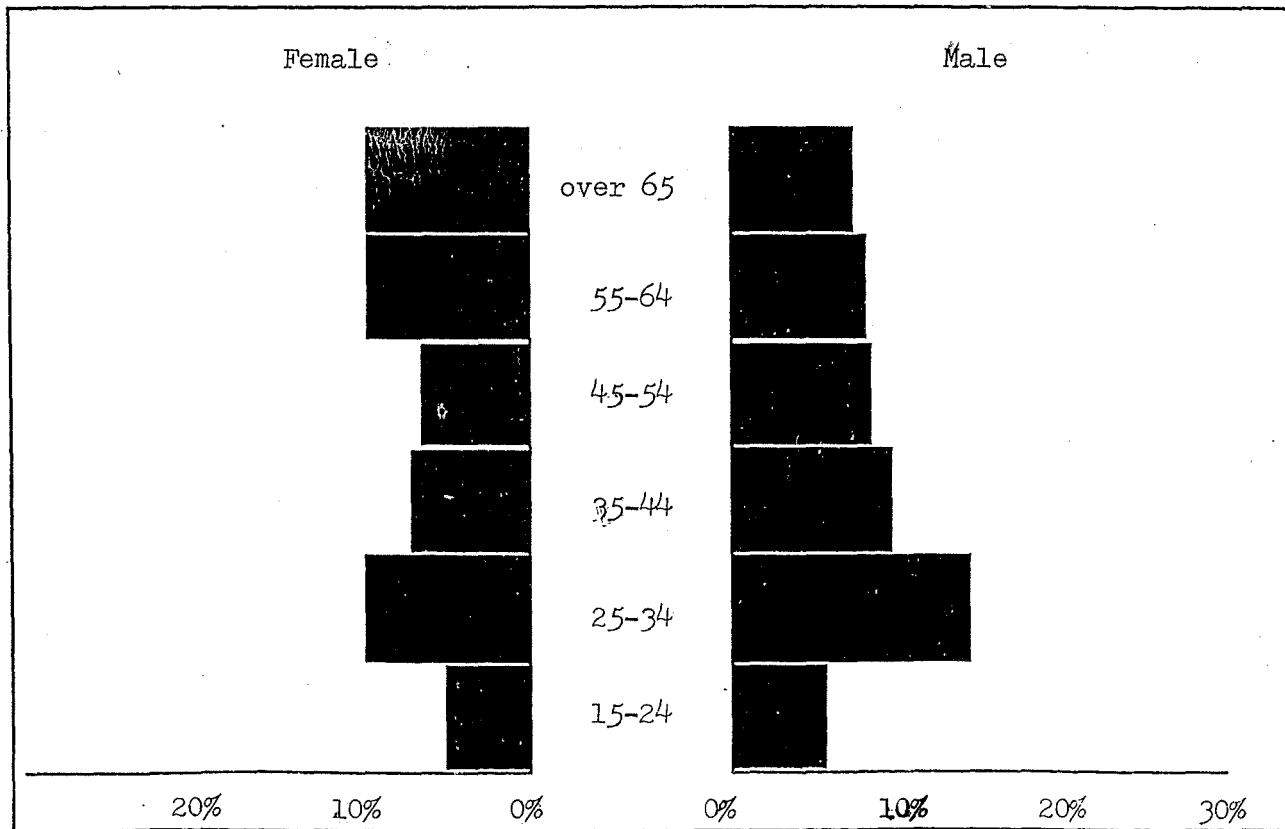


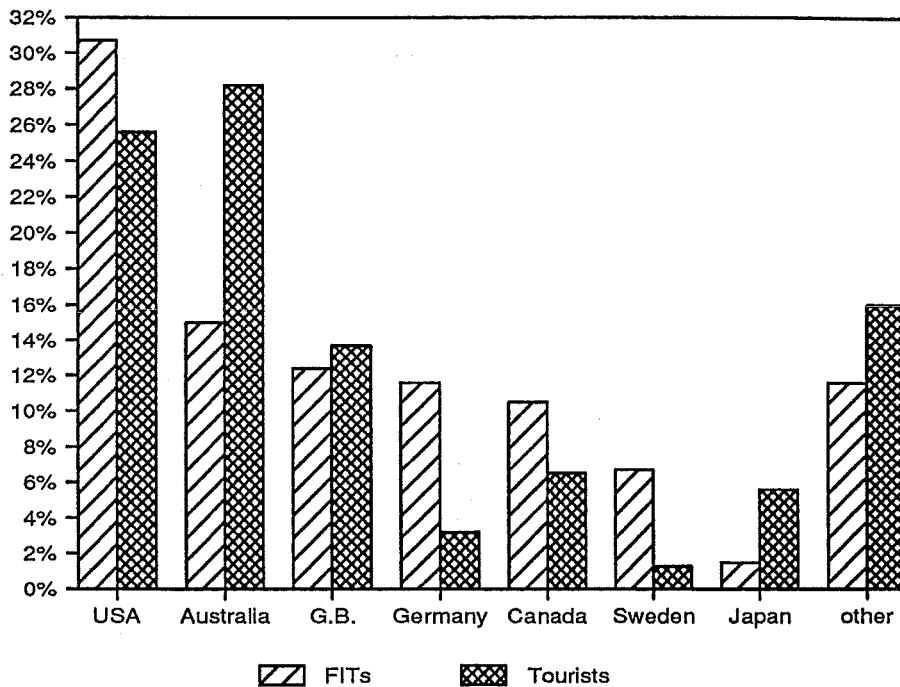
Figure 6. Population chart of Tourists



4.3.2 Comparison of country of residence of FITs and Tourists

Travellers from North America and Northern Europe are more likely to be travelling independently. So that a χ^2 would be valid, those countries which contributed to less than five percent in each study were grouped together in a category of 'other'. Statistically the country of residence was significantly different between FITs and Tourists ($\chi^2_{ps=10^2}$ (7 d.f.)=82 $p<0.01$). In Figure 7 the percentage share of country of residence of FITs and Tourists is shown.

Figure 7. Percentage share of country of residence of FITs and Tourists



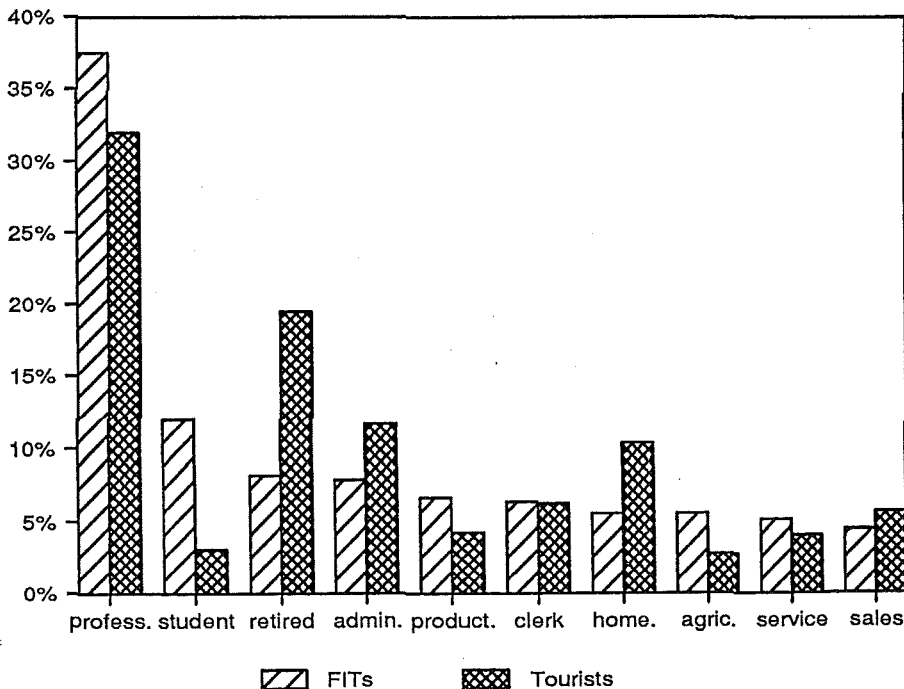
FITs are over-represented in being residents of the USA, Canada, Germany and Sweden. They are under-represented by Australian, British and Japanese. Only fourteen percent of FITs are Australians compared with 28 percent of Tourists. It is somewhat surprising that Australians are under-represented as using a non-package holiday style in both the FIT and NZTP (1982b) study. From Glentanner Park (1986), Australians, our nearest neighbours and a well informed established market, would be expected to travel in the mature stage of independent FITs. The familiarity with destination cycle theory has not been supported by these results.

The percentage of Germans in the FIT group is over three times that of the Tourist group. Senior (1982) who looked at world wide travel patterns, found that usage of organised travel companies varied considerably between countries of residence. Approximately 60 percent of international tourist trips by British residents were not organised through travel companies. However, German travellers were even less likely to use a travel company, preferring to organise their own trips (around 85 percent of their trips were not organised).

Although similar overall, the FIT results show some differences from NZTP (1982b) In the NZTP (1982b) study, British, German, and Canadians were over-represented in not travelling with a package tour and the USA and Australians were under-represented. In the FIT study the British are under-represented and the USA over-represented. The discrepancy may be due to a real change in holiday patterns over the last six years, or may reflect the difficulty of wording a question relating to holiday style. For further detail of country of residence see Section 5.3.2.

4.3.3 Comparison of occupation of FITs and Tourists

Figure 8. Percentage share of occupations of FITs and Tourists



The percentage share of occupations of FITs and Tourists can be seen in Figure 8. There are significant differences in the occupations of FITs and Tourists (χ^2 (9 d.f.)=66 $p<0.01$). In both groups the professional occupations dominate, 37 percent of FITs and 32 percent of Tourists. FITs are over-represented in the professional, production, agricultural and student categories and under-represented in the administrative, retired and homemaker categories.

The most important differences are the percentages of FITs and Tourists in the retired or student groups. Eleven percent of FITs are students compared with only three percent of Tourists. Only eight percent of FITs are retired while nineteen percent of the Tourists are in this category.

These occupational variations may be a reflection of the different proportion of ages and sex ratios of FITs and Tourists. FITs who are younger are more likely to be students while the older group of Tourists are more likely to be retired. The lower proportion of females in the FIT study may explain the lower percentage of homemakers. Further details of FITs occupations are contained in Section 5.3.4.

4.3.4 Repeat visitors

Most FITs are visiting New Zealand for the first time. In Table 7 the percentage of FITs and Tourists in each category of number of times previously visited New Zealand is shown.

Table 7. Percentage share of number of repeat visits of FITs and Tourists

No of times previously visited New Zealand	FITs (%)	Tourists (%)
0	88.0	60.0
1	7.5	14.6
2 - 5	3.7	15.7
6 - 10	0.7	4.5
11+	-	5.2

FITs and Tourists differ in terms of how many times they have previously visited New Zealand (χ^2 (4 d.f.)=76 $p<0.01$). FITs are less likely than Tourists to be repeat visitors with 88 percent of FITs visiting New Zealand for the first time. In comparison, 40 percent of the Tourists have been in New Zealand prior to this trip and approximately five percent have been in New Zealand more than ten times. Further details of repeat visits of FITs are contained in Section 5.3.5.

4.4 Summary

FITs differed from Tourists in both holiday behaviour and demographic characteristics. The holiday behaviour of FITs differed from Tourists in that :

- FITs stayed longer,
- FITs were more likely to be travelling as a couple or a pair and
- the daily holiday expenditure of the average FIT was less than the average Tourist's.

In demographic characteristics, FITs differed from Tourists in that FITs are :

- younger,
- more likely to be male,
- more likely to be residents of North America and Europe,
- more likely to be in professional, student, production, agricultural or service occupations and
- unlikely to have visited New Zealand before.

The free independent travel style is associated with particular demographic characteristics and holiday characteristics. The FIT group are more homogeneous than the diverse group of Tourists.

Chapter 5

Objective B. Description of FITs

5.1 Introduction

In this chapter Objective B is investigated; FITs are described using the model (given in Table 2, Section 3.1). The holiday behaviour, demographic characteristics and lifestyle profiles of FITs are detailed answering the questions, what do FITs do?, who are FITs? and what motivates FITs? The data were obtained from Study A, the 267 FIT interviews. Where applicable, comparisons with NZTP International Visitor Survey results are included. Comparisons are limited due to the age of NZTP studies and the seasonal nature of the FIT study. Even so, some differences are considered valid. The structure of the model is followed in this chapter; the three major headings being holiday characteristics, demographic characteristics and lifestyles of FITs.

5.2 Holiday characteristics

From the counts of travellers approached for the FIT study (Appendix B), the number of FITs visiting New Zealand in 1988 can be estimated. Of travellers approached in the FIT study, 32.4 percent of the holiday visitors were FITs (Section 3.5). Although the number of FITs interviewed represents a relatively small sample and is seasonally biased, the proportion of FITs in this study is similar to the proportion who did not use a package tour in recent NZTP studies (see Section 2.3.2). Assuming that the proportion of FITs of all holiday visitors remains constant during the year, approximately 150,000 FITs visited New Zealand in 1988 (32.4 percent of 455,834 to three significant places).

5.2.1 Before arriving in New Zealand

5.2.1.1 Bookings

The criteria for being a FIT was that the traveller had pre-booked less than twenty percent of their holiday before arriving in New Zealand. In Table 8 is listed the type of bookings that FITs had made. The bookings that were made still constituted less than twenty percent of the holiday.

Table 8. Bookings before arrival in New Zealand

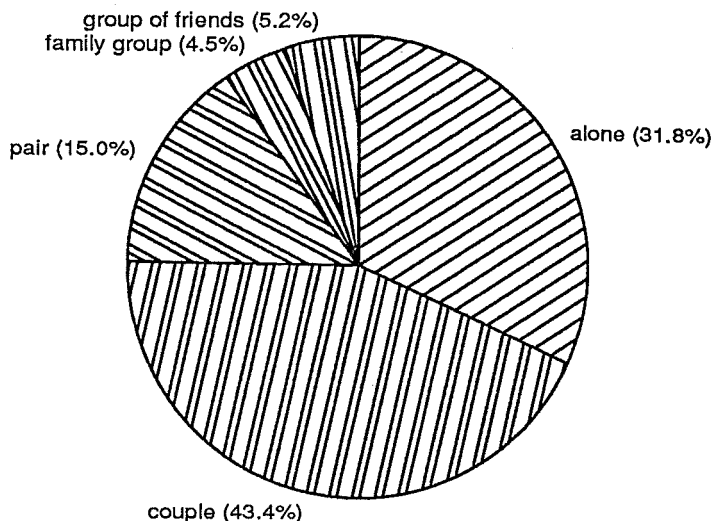
Booking	(%)
no bookings	62.4
rental vehicle	14.7
rental vehicle and accommodation	13.0
accommodation	4.5
travel passes	3.0
Milford track - independent	0.7
internal travel	0.4
travel pass and Milford track - guided	0.4
rental vehicle and homestay	0.4
rental vehicle and internal travel	0.4

About two thirds of the FITs had made no bookings. Some made bookings for rental vehicles and accommodation mostly to connect with international flights. A few FITs had booked the activity of tramping the Milford Track.

5.2.1.2 Travel group

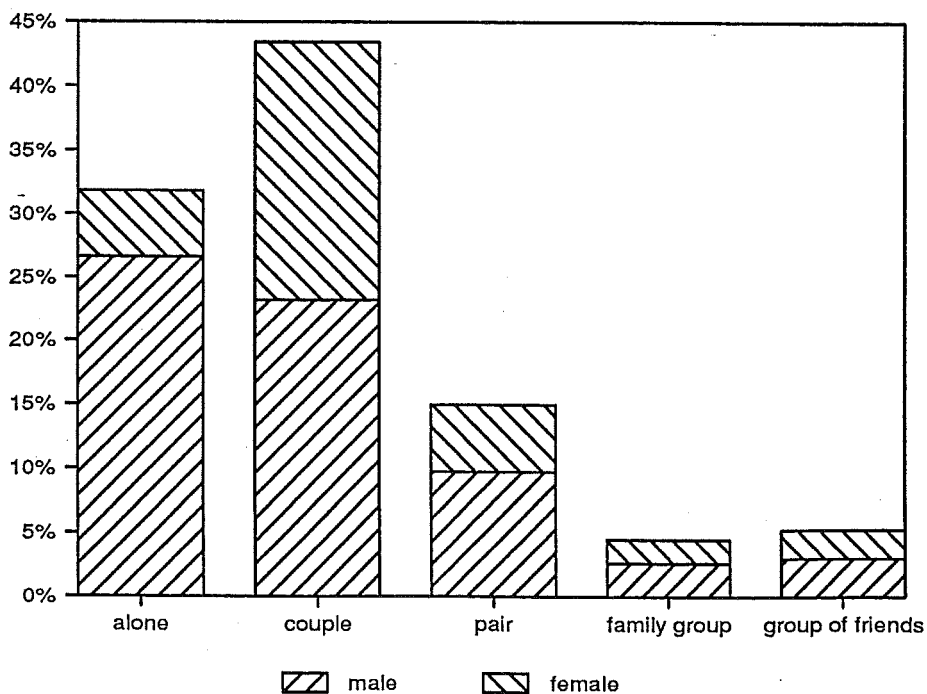
In Figure 9 the proportion of FITs in each group type is shown. For definitions of travel group categories and discussion of differences in group size and travel style (FITs and Tourists) see Section 4.2.2.

Figure 9. Travel group type and size



The shading of the segments in Figure 9 indicates the size of the group; those alone is striped, those travelling in two's (couples and pairs) are double striped and those travelling in groups of more than two (family groups and groups of friends) are multi striped. The most frequent category for travel group was a couple. The most frequent travel group size was in a group of two.

Figure 10. Gender of travel group type

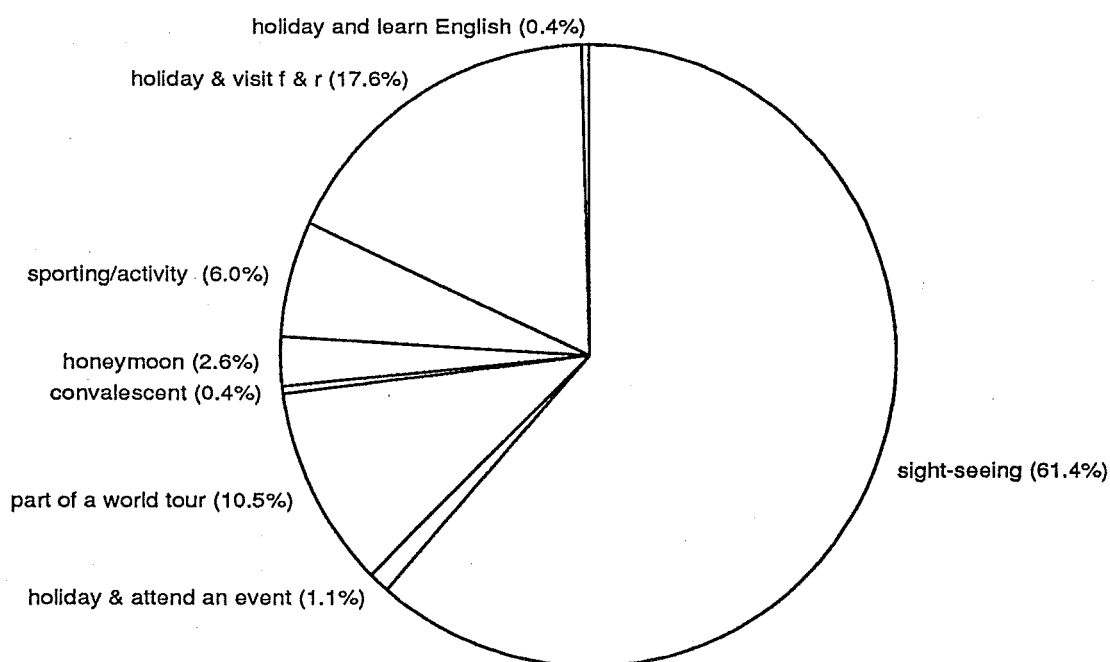


The male female ratio, also discussed in Sections 4.3.1 and 5.3.1, is related to the travel group. In Figure 10 each group type is segmented into males and females. Couples (defined as a two people in a heterosexual relationship) were composed of equal numbers of men and women. In contrast, men dominated the travelling alone category and there were more male pairs than female pairs. FIT women rarely travelled alone, the majority travelled with at least one other person.

5.2.1.3 Purpose of holiday

In Figure 11 the purpose of the holiday of FITs in New Zealand is shown.

Figure 11. Purpose of holiday



The majority of FITs classified themselves as being in New Zealand for sight-seeing. Some FITs combined a holiday in New Zealand with other pursuits, for example visiting friends and relatives, attending an event or learning English. For others, New Zealand was a part of a world trip. Some FITs came to New Zealand for sports and activities rather than sight-seeing (for example climbers, anglers, surfers). A minority

were in New Zealand for a particular type of holiday (for example honeymoon or convalescence).

Many of the FITs from the northern hemisphere were taking advantage of the opposite seasons. By having a holiday in New Zealand in the New Zealand summer, they avoided some of the northern winter.

5.2.1.4 Information about New Zealand

Table 9. Source of most useful information

Information source	(%)
friends and relatives	41.9
articles, documentaries and travel guides	27.3
travel agents	12.4
previous visit	9.8
travellers who had visited New Zealand	3.7
New Zealanders visiting my home country	3.0
New Zealanders travelling	1.9
advertising	0.7

The best source of information (Table 9) was frequently through a personal contact of someone who had been to New Zealand; either friends and relatives, New Zealanders who had visited the FITs' home country or New Zealanders and other travellers they had met during their own travels. Articles, documentaries and travel guides were also used by a substantial percentage of FITs. Few FITs said that travel agents were useful sources of information.

NZTP (1988b) documents the most useful information source of Tourists. FITs and Tourists differ in their information sources with the largest single category for most useful information source for Tourists being travel agents (36%). In contrast FITs frequently obtain information from friends and relatives and articles, documentaries and travel guides. FITs who are well travelled tend to be skeptical of information from travel agents.

5.2.1.5 Equipment brought

A traveller's equipment pre-defines the holiday he/she may have. Hiring equipment is unusual so travellers have to bring their equipment with them or buy it in New Zealand. A backpack is almost essential for overnight tramping trips and walking for any distance with luggage. Those who intend to go camping usually bring a tent and possibly a camp stove. In Table 10 the percentage of FITs who brought specialist equipment with them on their holiday in New Zealand is shown.

Table 10. Equipment brought

Item	(%)
camera	91.4
travellers cheques	86.9
credit card	78.3
backpack	54.7
walking boots	30.7
tent	28.1
fishing gear	11.2
snorkeling/scuba gear	6.0
bicycle	5.6
binoculars	4.5
camp stove	3.0
climbing equipment	2.6
other	6.7

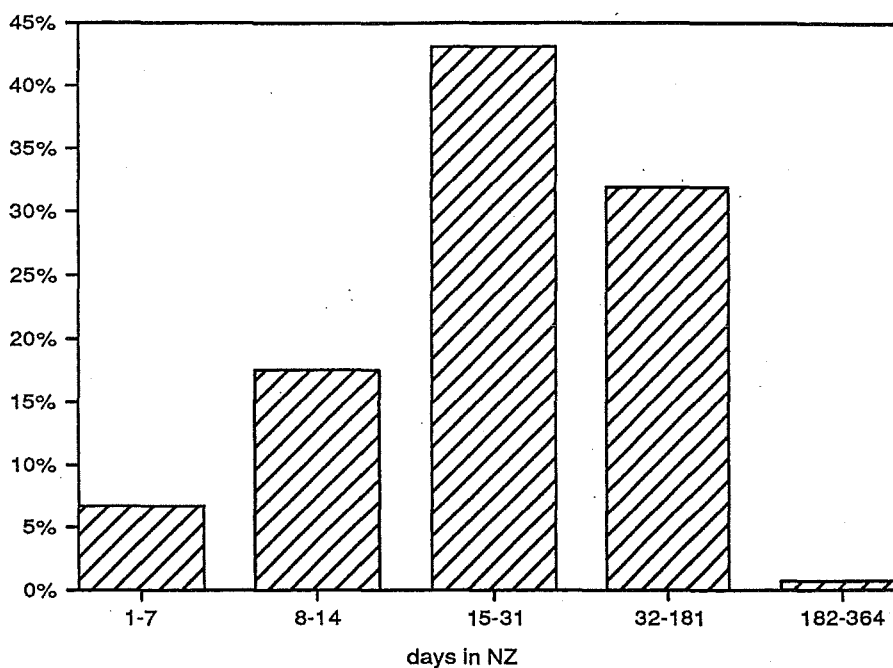
Like most travellers, FITs brought cameras, travellers cheques and credit cards on their holiday. More than half the FITs had backpacks and many also had walking boots and tents. This indicates they had decided to go tramping while in New Zealand. Those FITs whose major transport was bicycle brought their bicycles with them. 'Other' consisted of a New Zealand bank account, surf board, tennis racquet, mandolin, backgammon set, video camera and skate board.

5.2.2 In New Zealand

5.2.2.1 Length of stay

FITs stayed in New Zealand for between four days and 206 days. The mean length of stay was 33 days and the median 23. The proportion of FITs in each class of length of stay is shown in Figure 12. For a comparison of length of stay between FITs and Tourists see Section 4.2.1.

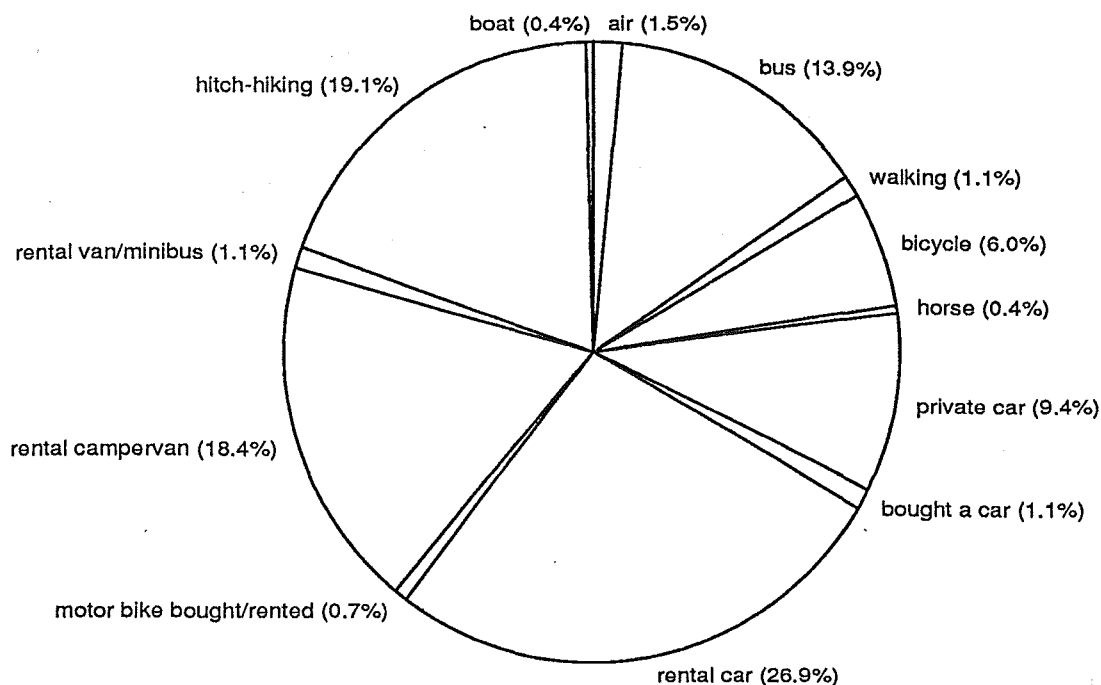
Figure 12. Length of stay



Most FITs were staying for long holidays, the largest category being '15-31' days and the next largest being '32-181' days. While the figure does not show particular days, there were high points at fourteen days (7.5% of FITs) and 21 days (4.9% of FITs). The long length of stay of FITs is consistent with the long length of stay of socially interactive visitors (Marsh and Henshall 1984).

After their arrival in New Zealand, some FITs had brought forward or postponed their departure date. Therefore the length of time in New Zealand was different from the original plan.

Figure 13. Most important transport form



The single most important form of transport was rental car. Hitch-hiking, rental campervan, private car, bus and bicycle were also featured prominently as major transport form. More than half of the FITs had their own vehicle (car, rental car, motor bike, rental campervan) as their most important transport. Some FITs used unusual transports. While buying a car, using a motor-bike, boat and horse were rare transport forms, for some FITs they were the most important type of transport.

NZTP (1988a) includes information on 'major transport type' of international holiday visitors to New Zealand in the 1987/1988 period. Their definition of major transport type is slightly different to that used in this study. Even so, a comparison provides new information. Some of the categories had to be rationalised; hitch-hiking in the FIT study was included in the private vehicle. The greatest difference between the two groups was the percentage using private car as their major transport; 29.6 percent of FITs (19.1% hitch-hiking + 9.4% private car + 1.1% bought a car) and 7.3 percent of Tourists. This was offset by the small percentage of FITs who used coach/bus/train as the major transport; 13.9 percent of FITs and 30.0 percent of Tourists). Other transports were not greatly different.

FITs used many different transports during their holiday, the average number of different types was four, ranging between one and nine. In Figure 14 the percentage of

Reasons given for alterations were :

- health problems of relatives at home,
- not enjoying the holiday because of expense so continued the holiday elsewhere,
- not enjoying the holiday for personal reasons and returned home early and
- because the weather was bad, the holiday had to be extended to complete all the desired activities.

5.2.2.2 Holiday components

5.2.2.2.1 Transport

FITs were asked to specify all the forms of transport they used in New Zealand. They were then asked to rank them in order of the number of days used. Each transport form was graded into :

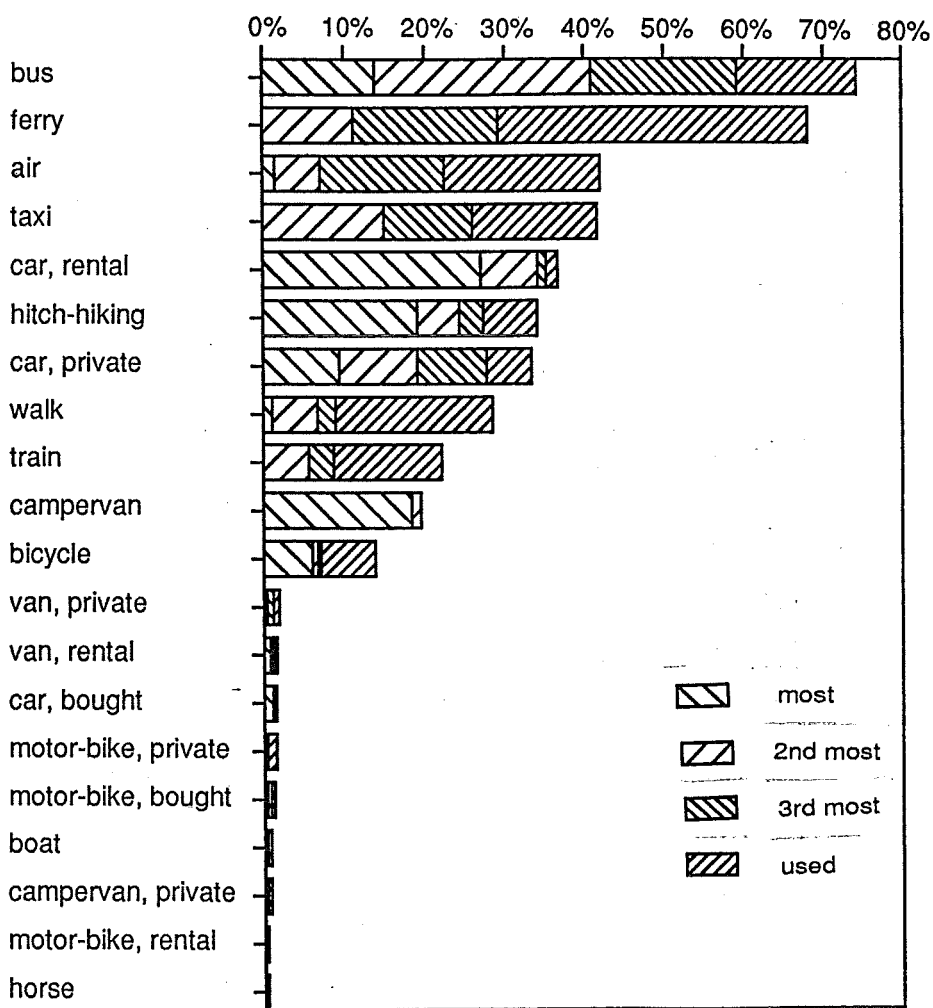
- used on the most days, (most important) or,
- used on second most days, (second most important) or,
- used on third most days, (third most important) or,
- used but not in the top three, (used) or
- not used.

Transport is distinguished from sight-seeing in that the individuals luggage had to be included in the movement. For example 'walking' was not just taking a walk in a park, rather the person had to be carrying their luggage with them. Private car is defined as using a car which is privately owned (for example, travelling in a friend's car) while 'bought a car' means the FIT purchased the vehicle.

Each FIT gave one form of transport as the form of transport they used on the most number of days (Figure 13).

FITs who used each transport form is shown. Each bar is divided into the importance of the transport. Data of most important transport can be seen in both Figures 13 and 14. For example, 13.9 percent of FITs used bus as their major transport. It can be seen in Figure 14 that a further 27.0 percent used bus as their second most important transport, 18.4 percent used bus as their third most important transport and 15.0 percent used bus as fourth or less important. A total of 74.2 percent of FITs used bus at least once during their holiday in New Zealand.

Figure 14. All transport forms used with importance



Comparing the most important transport forms (Figure 13) with transport forms used (Figure 14) some differences are evident. The most important forms of transport were not necessarily those used by the greatest number of FITs. Over 74 percent of FITs

used a bus at least once during the holiday but only 13.9 percent said bus was their most important form of transport.

Most FITs used commercial transport forms supplied by tourism organisations (bus, ferry, rental car). Some FITs used private vehicles; either having their own car or bicycles or borrowing or travelling with friends and relatives.

A large proportion of FITs used plane at least once during their holiday. While air travel used to be an expensive but convenient method, it is currently cheaper than travelling by land for some of the longer journeys. For example, in December 1988, the lowest fare made it possible to fly from Christchurch to Auckland for \$66. Competition between airlines has created heavy discounting and price discrimination under particular conditions. By train and ferry, which have no special fares, the minimum cost was \$156. Even though FITs generally have enough time and could consider the slower land travel there is no financial incentive for them to do so.

Information about all forms of transport used by Tourists was found in NZTP (1982a). Again the definition used by NZTP, different to that used in this study, is based on travel sectors. Any comparison of the results of the two studies is limited because of the five years gap in studies and the seasonal component in the FIT study.

FITs in 1988 were more likely to use each of the transport types than Tourists in 1982. FITs used a greater variety of transports. The largest difference was in use of the inter-island ferry which was used by 68.2 percent of FITs and only 30.7 percent of Tourists. Another large difference was in hitch-hiking, 34.1 percent of FITs and only 7.5 percent of Tourists. Bicycles were not a category for the 1982 NZTP survey, so would have been included in the 'other' category. Almost fourteen percent of FITs used bicycles while a maximum of 4.4 percent (included as 'other') of Tourists used bicycles in 1982.

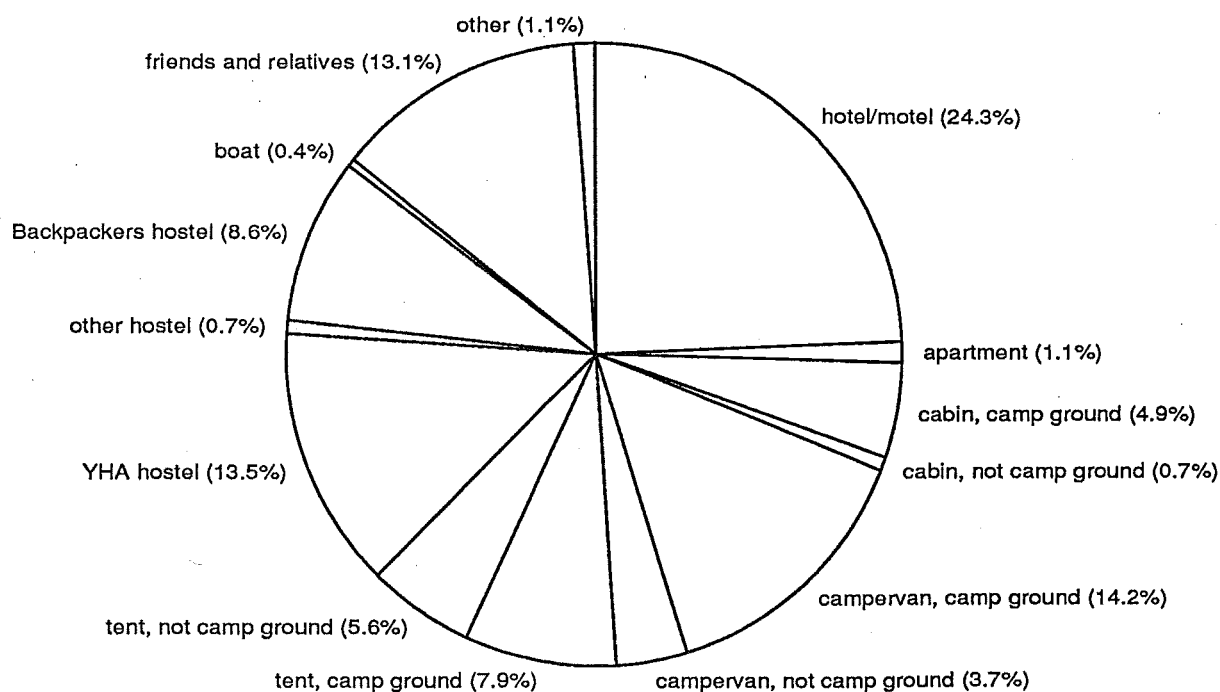
5.2.2.2.2 Accommodation

FITs were asked to specify all forms of accommodation used. They were then asked to rank the accommodation forms used in order of the number of nights used. Each accommodation form were graded into :

- used on the most number of nights (most important) or,
- used on the second most nights (second most important) or,
- used on third most nights (third most important) or,
- used at least one night (used) or
- not used.

The major accommodation forms of FITs are shown in Figure 15.

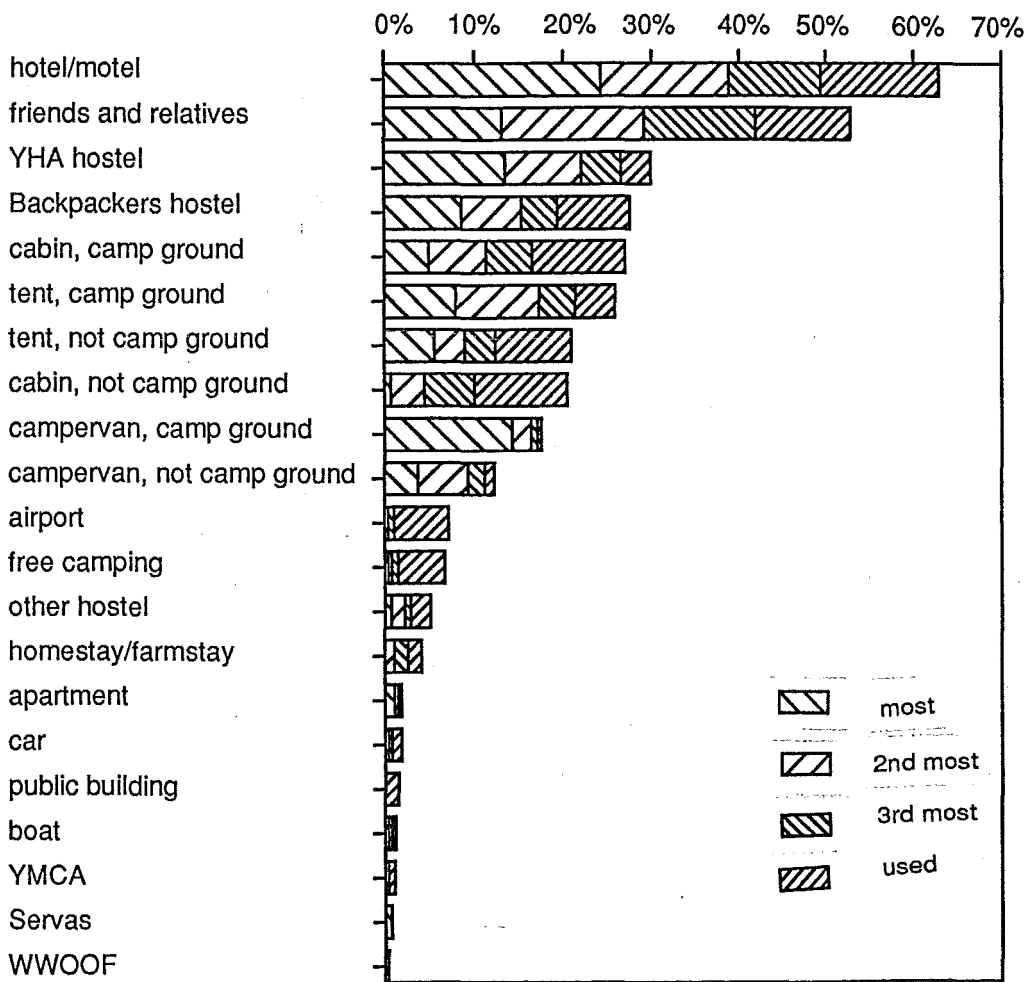
Figure 15. Most important accommodation form



Hotel/motel accommodation was the largest single category of most important accommodation. When similar categories were combined, camp grounds (either using tent, cabin or campervan) was the largest category (27%). Combined hostel accommodation (23%) was also important. Cooking facilities are a common factor of those accommodations used by FITs.

The most recent information of major accommodations of Tourists is documented in NZTP (1982a). The differences between FITs in 1988 and Tourists in 1982 are great. Tourists were most likely (66%) to use hotel/motel/guest house as their major accommodation. In contrast only 24.3 percent of the FITs cited hotel/motel/guest house type accommodations as most important. FITs were more likely than Tourists to use camp grounds (27.0% : 11.6%), hostels (22.8% : 4.5%) and friends and relatives (13.1% : 8.6%) as their major accommodation types.

Figure 16. All accommodation forms used with importance



The accommodation forms used by FITs, segmented into their level of importance can be seen in Figure 16. Figures 15 and 16 both include data of the most important accommodation. Figure 16 has additional data about minor accommodation forms. For example, it can be seen in Figure 15 that 24.3 percent of FITs used hotel/motel as their

most important accommodation. Figure 16 shows that a further 14.6 percent used it as second, 10.5 percent as third and 13.5 percent used as minor form of accommodation. A total of 62.9 percent of FITs used hotel/motel accommodation at least once during their holiday in New Zealand.

The number of different types of accommodation used ranged between one and eleven, the mean being four. Some of the accommodation forms are relatively unknown to the commercial accommodation industry. Servas and WWOOF (Willing Workers On Organic Farms) are non-profit organisations offering accommodation to particular travellers. Servas hosts offer free hospitality to international travellers who are invited to participate in local activities and share their concerns and interests. WWOOF members work on organic farms in exchange for meals, accommodation and experience in organic methods.

The most recent information on accommodation forms used by Tourists is documented in NZTP (1982a). FITs used a greater variety of accommodations than Tourists. The greatest differences of accommodations of FITs and Tourists were in the categories of staying with friends and relatives (52.8% : 22.8%), hostels (30.0% : 8.6%) and camp grounds (28.8% : 18.3%).

5.2.2.2.3 Activities

Respondents were asked about their activities in New Zealand. They were asked if they had participated in each of a list of activities and if it was the first time they had tried the activity. They were also asked to specify any other activities they had participated in and if it was the first time. Finally they were asked which activity they had enjoyed the most.

Table 11. Activities : participation, new and most enjoyable

Activity	Participated in activity (%)	It was a new activity (%)	It was the best activity (%)
visited national park	95.9	-	12.0
tramping	78.7	5.6	30.0
visited museum	73.0	-	1.9
visited church	61.8	-	1.1
motor boat ride, (not jet boat)	56.9	0.7	9.4
stay overnight in national park	55.8	0.7	0.4
visit art gallery	46.4	-	0.4
gondola ride	25.8	2.2	-
fishing	25.1	2.6	3.0
visited Waitomo Caves	22.5	6.4	2.6
cable car ride	19.5	3.0	-
cycling	18.0	0.7	3.4
jet boat ride	17.6	15.0	4.1
white water rafting	14.6	6.7	4.9
aerial sight-seeing in a plane	14.2	1.9	2.2
guided nature tour	14.2	0.7	2.2
sailing	10.5	1.5	2.2
aerial sight-seeing by helicopter	7.5	4.1	3.0
canoeing	7.5	1.9	0.7
horse riding	7.5	1.5	0.7
chairlift	6.4	-	-
rock climbing	5.6	0.4	1.1
aerial sight-seeing by ski-plane	3.7	2.6	1.5
played golf	3.7	-	0.4
caving	3.7	-	0.4
mountaineering	3.0	-	1.1
water skiing	2.2	1.1	0.4
scuba diving	2.2	-	0.4
skiing	1.1	-	0.4
hang gliding	0.7	0.7	0.4
hot air balloon ride	0.4	0.4	0.4

In Table 11 the percentage of FITs who participated in each activity, if it was a new activity, and if it was the most enjoyable activity of those activities included in the interview schedule is shown. Many FITs visited national parks and participated in a diverse range of activities (active as well as passive). Some seasonal bias is evident in participation rates, such as the low incidence of skiers and climbers.

Recent information about activities of international visitors (including holiday, business and visiting friends and relatives) is documented in NZTP (1986). An important difference in activities of FITs and visitors is in the proportion who visited national parks (96% : 55%). Similarly there is a large difference in the proportions of FITs and visitors who stayed overnight in national parks (56% : 25%). In some activities, a similar proportion of FITs as visitors participated, for example jet boating (18% : 16%). However in most activities listed, FITs were more likely than visitors to participate; including visiting a museum or art gallery (73% : 54%), fishing (25% : 2%), cycling (18% : 1%), white water rafting (15% : 7%), and sailing (11% : 1%). The seasonal nature of FIT study is shown by the low proportion who skied in comparison with visitors in the NZTP study (1% : 5%).

The new activities were often a new type of travel; for example jet boating, helicopter flight, ski-plane flight, rafting.

Thirty percent of FITs cited tramping as their most enjoyable activity. The most enjoyable activities often involved skill, challenge and commitment. Many of the most enjoyable activities took place in a national park; for example, visiting a national park, tramping or a boat ride.

Other activities

Many FITs had participated in activities not listed. The other activities are listed in Table 12. They have been grouped by activity type. It is evident from the length of Table 12 that FITs participated in a broad range of activities. Including the 'other' activities, the number of different activities of FITs ranged between one and eighteen, the mean being eight.

Table 12. Other activities : participation, new and most enjoyable

Activity	Participated in activity %	It was a new activity %	It was the best activity %
Visiting tourism facilities			
Te Anau caves	3.4	0.4	-
Agrodome	1.9	0.4	0.4
90 mile beach day trip	1.9	1.5	0.7
thermal areas	1.5	0.7	-
Shantytown	0.7	-	-
Kelly Tarlton's Underwater World	0.4	0.4	0.4
Buried village	0.4	-	-
Milford triple trip ³	0.4	-	-
gold mines	0.4	0.4	-
Rainbow springs	0.4	0.4	-
Agricultural			
visited sheep farm	1.5	0.7	0.4
watched sheep shearing	1.1	0.7	-
helped on sheep farm	0.7	0.4	0.4
went to A & P show	0.7	0.4	-
drove a combine harvester	0.7	0.4	-
drove a tractor	0.7	0.4	-
shore sheep	0.7	0.4	-
apple picking	0.4	0.4	-
wool pressing	0.4	0.4	-
top dressing	0.4	0.4	-
graded sheep	0.4	0.4	-
milked a cow	0.4	-	-
visited a deer farm	0.4	0.4	-
fruit picking	0.4	-	-
Other			
visited botanic gardens	0.7	-	0.4
visited a zoo	0.4	-	-
to a play	0.4	-	-
to a music festival	0.4	-	-
Maori culture			
hangi	1.5	0.7	-
Maori culture show	0.7	0.4	-
Maori concert	0.4	0.4	-
Sports			
watched cricket	1.5	1.5	-
beach activities	1.5	-	1.1
played cricket	1.1	1.1	-

3/ three excursions in the Milford area

Table 12. continued

surfing	1.1	-	0.7
snorkeling	1.1	-	-
swimming	0.7	-	0.4
ice climbing	0.4	0.4	0.4
parachuting	0.4	0.4	0.4
paraflying	0.4	0.4	0.4
tree climbing	0.4	-	0.4
jet skiing	0.4	-	0.4
tennis	0.4	-	-
ten pin bowling	0.4	-	-
Fossicking			
gold panning	3.7	1.9	0.7
bird watching	0.7	-	-
greenstone prospecting	0.4	-	-
rock hunting	0.4	-	-
shell collecting	0.4	-	-
Food collecting			
sea fishing ⁴	1.1	1.1	0.4
mussell gathering	0.7	0.7	-
crabbing	0.7	-	-
deer hunting	0.4	-	-
rabbit hunting	0.4	0.4	-
learnt to stalk trout	0.4	0.4	-
clean possum skins	0.4	0.4	-
guided fishing trip	0.4	-	0.4
Sports guided			
black water rafting ⁵	1.5	1.5	0.4
horse and carriage	0.7	0.4	-
toboggan slide	0.4	0.4	-
water slide	0.4	0.4	0.4
Sight-seeing rides			
hovercraft	0.4	-	-
float plane	0.4	-	-
Nature excursions			
saw glow worms	1.1	0.7	-
saw seals	0.4	-	-
Educational			
learnt English	0.7	0.7	-
visited a factory	0.4	0.4	0.4
wool craft class	0.4	-	-
did a presentation at a school	0.4	0.4	-
visited a University	0.4	-	-
learnt to bone carve	0.4	0.4	-

4/ some people specifically mentioned sea fishing as separate from fishing

5/ floating in an underground river

Gold prospecting was a common 'other' activity. For those from non-cricket playing countries, the game of cricket was popular, maybe playing or watching a live game or watching on television. Many of the 'other' activities were not usually associated with tourism. For example, cleaning possum skins is unusual for tourists and for some people may not even be regarded as recreation. Many of the activities in the other category were of a specialist nature (for example tree climbing). Many of the activities in which FITs participated were high risk or unusual. Not many New Zealanders would have done them. Some FITs participate in unusual and unique activities.

Some activities are not available to visitors on structured holidays. For example black water rafting, in the Waitomo Caves, was only opened as a commercial venture in the summer 1988. Those who come to New Zealand on pre-arranged schedules would not know the opportunity existed.

5.2.2.2.4 Combinations of transports, accommodations and activities

The relationships between the various types of accommodation, transport and activities and their importance may be better explained by identifying clusters which occurred. Some transport forms were associated with accommodations, and some activities with transports.

Grouping analysis (Section 3.4) was used to identify the frequent combinations of holiday characteristics. Only those factors which were used by at least ten percent of FITs were considered in this analysis. Clustering requires a numeric scale for each factor. Because the nature of the raw data was different, transport and accommodation forms were scaled : not used (1), used at least once but not in the top three (2), third most important (3), second most important (4), most important (5) and activities were scaled : not participated (1), participated but not the most enjoyable (3), most enjoyable activity participated (5).

The holiday combinations which occur frequently are given below. A descriptive name has been given to each group, chosen because it was the dominant holiday component (transport, accommodation or activity) of the group. The value of importance for the group mean is given in brackets, ranging between 1 not used to 5 very important.

Hitch-hikers comprised 27 percent of the sample. The major transports 'Hitch-hikers' used were hitch-hiking (4.3) and bus (3.5). A minor form of transport was the ferry (2.1). This group may have used private car (1.6), and walking (2.0) also. Backpackers hostels (2.6), YHA hostels (2.6) and staying with friends and relatives (2.6) were important accommodations for 'Hitch-hikers'. Tents in (2.5) and out (2.3) of camp grounds were minor forms of accommodation. Cabins in (1.6) and out (1.9) of camp grounds may also have been used. Tramping (3.9), visiting a national park (3.1), visiting a museum (2.6), staying overnight in a national park (2.6), visiting an art gallery (2.2), and visiting a church (2.1) were frequent activities. 'Hitch-hikers' were the most likely group to go fishing (1.8) and on a cable car (1.5). However, they were the least likely to go on a gondola (1.2), plane (1.2), jet boat (1.3) or a boat trip (1.7).

Motel users comprised 22 percent of the sample. 'Motel users' used a combination of private cars (3.1) and rental cars (2.8) as major transport forms. Bus (2.6), taxi (2.4) and air (2.4) were less important transport forms and 'motel users' were the least likely to use the ferry (1.6). Staying in hotels/motels (4.2) was the dominant accommodation for this group and substantial numbers stayed with friends and relatives (3.4). The frequent activities of 'motel users' were a boat trip (3.1), visiting a national park (3), tramping (2.5), visiting a museum (2.5) and visiting a church (2.2). 'Motel users' were the least likely to stay overnight in a national park (1.4), go to Waitomo caves (1.4), go rafting (1.2) or on a cable car (1.2).

Rental car users comprised nineteen percent of sample. Rental car (4.6) was the dominant form of transport for 'rental car users' and this was supplemented by bus (2.5) and ferry (2.2). Hotel/motel (3.6) and cabin in camp ground (2.2) were the most important accommodations. 'Rental car users' may have used a tent in camp ground (1.6) and Backpackers hostels (1.7). 'Rental car users' probably visited a national park (3.1), tramped (3.1), visited a church (2.4), visited a museum (2.3) and went on a boat trip (2.5). They were more likely than all the other groups to have gone on a jet boat ride (1.6) or an aerial sight-seeing plane flight (1.5).

Campervanners were nineteen percent of the sample. Campervans (5.0) dominated transport of this group. They also used taxi (2.1), and ferry (2.4). Compared with the other groups, 'campervanners' were the least likely to ever use a bus (2.1). The most important accommodation was using the campervan in camp grounds (4.4). Some 'campervanners' freedom camped with their campervans (2.8). Minor accommodations used were hotel/motel (2.6) and staying with friends and relatives (1.7). The common activities of 'campervanners' were visiting a national park (3.6), tramping (2.9), visiting a museum (2.4), a boat trip (2.5), visiting a church (2.4), staying overnight in a national park (2.3) and visiting an art gallery (2). They were the least likely to go sailing (1.1) or cycling (1).

Hostellers comprised twelve percent of the sample. Bus (3.7) was the highest graded transport form for 'hostellers'. Bicycle (3.0) was also an important transport form. Many also used the ferry (2.2), train (2) and air (2). YHA hostels (3.9) were the highest ranked accommodation form. Friends and relatives (2.2), Backpackers hostels (2), cabin in camp grounds (2) and tent in camp grounds (2) were also used. The activities of 'hostellers' were tramping (3.3), visiting a national park (2.9), cycling (2.9), staying overnight in a national park (2.6), visiting a museum (2.6), visiting a church (2.3), visiting an art gallery (2.2), riding on a gondola (2.1) and a boat trip (2.1). They were more likely than all other groups to go rafting (2), on a nature tour (1.7), Waitomo caves (1.7) and sailing (1.4). They were the least likely group to go fishing (1.3).

5.2.2.3 Travel guides

FITs were asked to name their most useful travel guide and where they had purchased it. Forty-two percent of FITs did not use a travel guide. In Table 13 the proportion of FITs most useful travel guide is shown.

Table 13. Travel guide used

Travel guide	(%)
A Travel Survival Kit, published by Lonely Planet	16.5
AA accommodation guide	4.9
New Zealand Handbook, Jane King	3.0
Fromers, New Zealand on \$25 a day, Susan Poole	2.6
Insight	2.2
Berlitz	1.9
Polyglot *German	1.9
Mobil New Zealand Travel Guide	1.9
Fodors, Australia, New Zealand and the South Pacific	1.5
NZTP brochure	1.5
Travel agents brochure	1.5
Cycling in the North Island and Cycling in the South Island	1.1
Stein *German	1.1
Du Mont *German	0.7
APA guide Neuseeland * German	0.7
Jasons budget accommodation guide	0.7
Tramping in New Zealand, published by Lonely Planet	0.7
Fishing in the South Island, Tony Bush	0.7
Handout at Auckland airport	0.7
Sunset	0.7
Bus timetable	0.4
Walking in the World : New Zealand *Japanese	0.4
DST globetrotter, Diamond Big Co Ltd. *Japanese	0.4
New Zealand *	0.4
quick description of National Parks of New Zealand	0.4
Food and drink of New Zealand	0.4
Lands and survey - Atlas of New Zealand	0.4
YHA guide	0.4
A field guide to New Zealand, South Island, Diane and Jeremy Pope	0.4
New Zealand accommodation guide	0.4
Neuseeland Richtig Reisen, Fischer *German	0.4
Boken om Ny Zealand *Swedish	0.4
AA maps	0.4
maps	0.4
New Zealand South Island, Mountain Scene publication	0.4
Climbing in Mt Cook	0.4
Tramping in New Zealand	0.4
The Maverick Guide to New Zealand, Robert Bone	0.4
Shell motor guide	0.4
Birds of New Zealand	0.4
Pacific Business Guide, published by Axon and Jamieson	0.4
yes I used a travel guide but I can't remember its name	2.6

* not in English

More than half of the FITs used some written guide; either a travel guide, maps, brochures or timetables. The Travel Survival Kit, published by Lonely Planet, was the only book used frequently. Most FITs commented on how out of date the books were, especially in stating prices which have been effected by inflation and recommending organisations that had changed hands or gone out of business. Travel guides which encourage use of small scale operations have difficulty in keeping up to date. For example, black water rafting is not included in any of the guide books at the time of the interviews.

A wide variety of books were used, many in language other than English. Most of the FITs whose English was not fluent used a guide book in a language other than English.

Of those FITs who used a travel guide, 58 percent purchased it in their home country, 30 percent had obtained it during their travels and the remaining twelve percent had purchased it during their travels.

5.2.2.4 Travel passes

The majority of FITs did not use travel passes. Their reasons were :

- I/we were not interested in a travel passes (58.9%), or
- travel passes were too expensive (18.7%) or
- I/we did not know about travel passes (8.7%).

Passes ranged from full coverage of transport throughout New Zealand, to a daily city bus pass, or discount on sight-seeing tours. In Table 14 the type and frequency of travel passes can be seen. Only 34 FITs (13%) used some sort of travel pass in New Zealand. The most frequently used was the NZR pass, which is fifteen days travel on rail, inter-island rail ferry and NZR coach for \$355. While they were purchased on the belief they would save money and hassle, some FITs commented that would have been better off without them. Accommodations varied considerably so some FITs did not use their vouchers preferring to stay at accommodations that looked better. Transport passes restricted FITs to particular transport forms.

Table 14. Travel passes

Pass	(%)
NZR pass, \$355 for fifteen days	3.8
Newmans discount vouchers	1.9
hotel/motel vouchers	1.5
Air pass	0.7
Kiwi coach pass	0.7
NZ travel pass	0.7
Mt Cook line discount vouchers	0.7
Kiwi hotel/car pass	0.4
bus pass	0.4
Fiordland travel discounts	0.4
city bus pass	0.4
Country wanderer	0.4
Horizon discount vouchers	0.4
Rotorua sight-seeing discounts	0.4

5.2.2.5 Where FITs travelled in New Zealand

When asked where they had spent more time, 45 percent of FITs answered the South Island, 23 percent equal in both islands and 31 percent answered the North Island. Although the majority of travellers use Auckland as the gateway to New Zealand, most FITs travel throughout the country. At least 66 percent (the percentage who had been on the inter-island ferry) had travelled in both islands.

During the interviews many FITs disclosed where there had travelled during their holiday. FITs travelled all over New Zealand, including :

- gateway cities of Auckland and Christchurch,
- mass tourism resorts (the major tourist destinations of mass tourism development in New Zealand are the Bay of Islands, Rotorua and Queenstown) and
- more remote areas.

In addition to the mass destinations, FITs frequently visited some of the unique but more remote destinations. For example, The Routeburn Track in Fiordland and the coastal Abel Tasman Track were popular. Bird sites of the gannet colony at Cape Kidnappers, the albatrosses at Dunedin and the white herons at Okarito, South Westland,

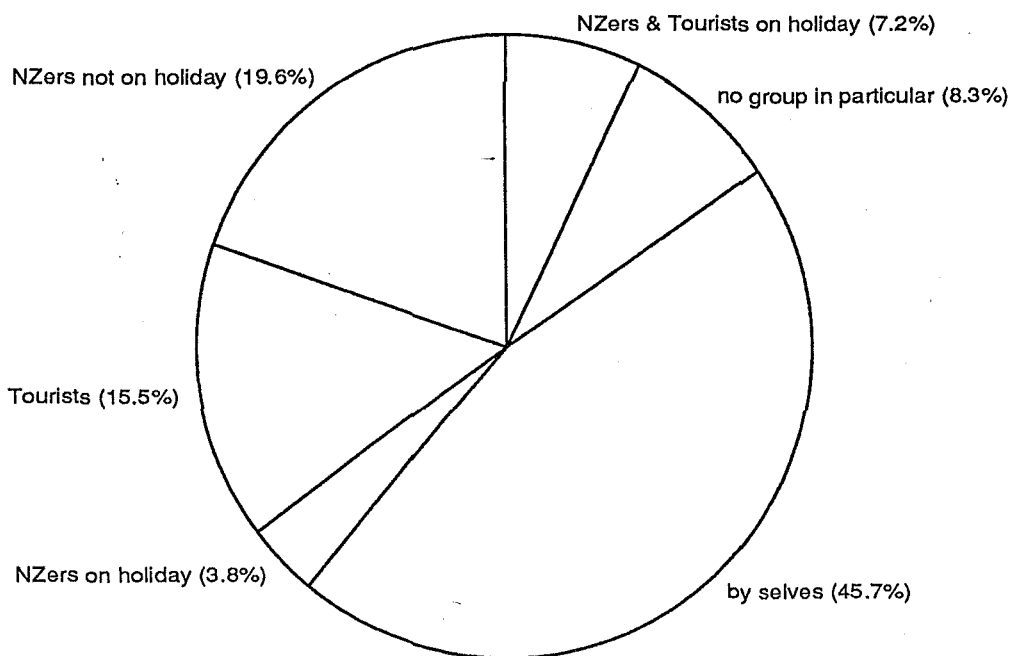
were mentioned as was Ketetahi springs in Tongariro National Park. Even though the destinations are world famous, they do require some effort on behalf of travellers to find them. These sites are not catering to mass tourism as some of the bird sites are fragile and the numbers associated with mass tourism would destroy the environment. As well as the ecological factors, FITs enjoyed the adventure of the journey (for example, the tractor ride along the beach to Cape Kidnappers).

While most FITs travelled throughout New Zealand, some only stayed at one site, preferring an in depth visit, relaxing and living as locals. FITs said that people were friendlier at those places where not many tourists visit. Their decentralised travel patterns are close to that predicted by Marsh and Henshall (1984). They like to meet locals preferring a generous host relationship rather than a formal service interaction.

5.2.2.6 Who FITs spent their time with

FITs were asked who they had spent most time with during their holiday in New Zealand. Figure 17 is a pie chart of their responses.

Figure 17. Whom spent time with



Fifty-four percent of FITs spent their time in the company of others. The largest contact group was New Zealanders not travelling; that is New Zealanders in their every day routine, either friends and relatives they already knew or contacts they had made while in New Zealand. The next largest group was 'other visitors'. FITs who used public transport or stayed in hostels and camp grounds were likely to make contact with others in a similar situation. In contrast, those who hired vehicles (especially campervans) and freedom camped said they had little contact with others.

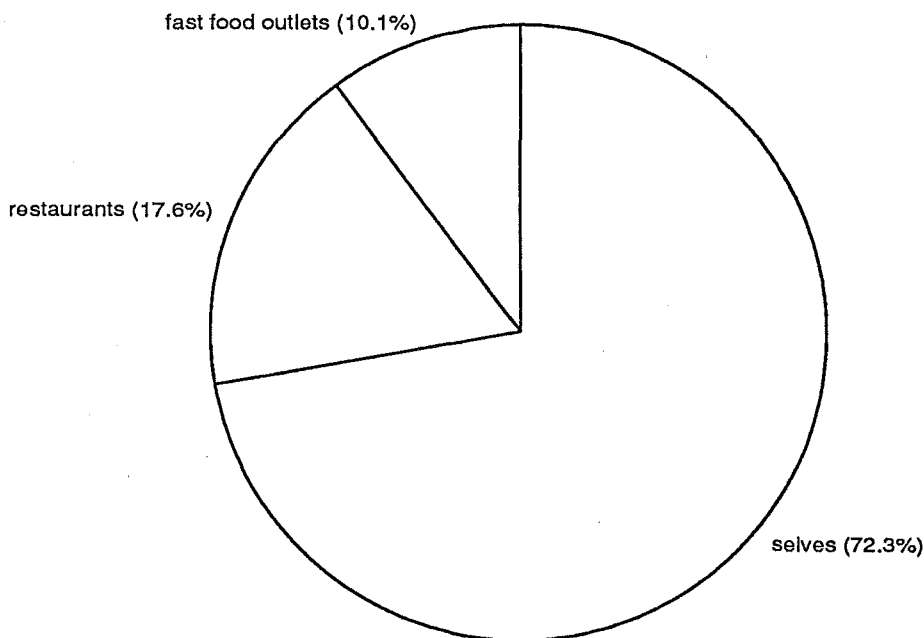
Marsh and Henshall (1984) predicted that the involuntary participants, voluntary participants and integrationists would be interacting with staff at motels and attractions, locals, friends and relatives and social networks of locals. This may explain the diversity of answers in the FIT study. FITs as a single group contain three different social groups,

- involuntary participants, who don't want to have contact with anyone, who spend their time by themselves when they can, 'by selves (45.7%)',
- voluntary participants, who wish to have some contact, 'Tourists (15.5%)', 'New Zealanders on holiday (3.8%)', 'New Zealanders and Tourists on holiday (7.2%)' and 'no group in particular (8.3%)' and
- integrationists, who want to become a member of the community, 'New Zealanders not on holiday (19.6%)'.

5.2.2.7 Food

In Figure 18 the sources of FITs' main meals are shown. Most FITs prepared their own food. A few went to restaurants or fast food outlets. Most of the accommodations in which FITs stayed had cooking facilities. NZTP (1982b) reported that just over half of the Tourists, in 1982, ate at restaurants, about a quarter prepared their own meals or ate with friends and relatives, three percent ate at fast food outlets and about one sixth did not specify. Even considering the time difference between the studies, there is a trend towards FITs preparing their own food more often than Tourists.

Figure 18. Source of main meals



5.2.2.8 Holiday highlight

Some people had difficulty in choosing just one highlight out of the many things they had enjoyed in New Zealand. While the majority cited a particular place as being their highlight, some chose an activity, particular people or a combination of people, activity and place. No single highlight was selected by more than five percent of FITs.

While FITs chose places all over New Zealand, beautiful and good weather were common factors for selecting a particular place as the highlight. The area of Milford sound, including the sound itself, the access routes of walking, air and road were chosen by some FITs. Other national parks were also popular. National parks in the south of the South island were often chosen. Trampers enjoyed the Milford, Routeburn, Rees-Dart, Copland and shorter day walks from places such as Te Anau, Franz Josef and Arthurs Pass. Instead of tramping, some FITs enjoyed the alpine areas by flying, especially over Mt Cook and the glaciers.

Water and mountains were common elements in choice of highlight. Fishing in the Bay of Islands, climbing Ruapehu and cycling around the Blue and Green Lakes at Rotorua are examples. FITs enjoyed the unspoilt areas that New Zealand offers. The relatively unpolluted clear water impressed some FITs especially conservation conscious

Europeans. Some FITs cited unique sites as their highlight including Rotorua's thermal area.

As well as particular places, FITs often enjoyed journeys between places, some because of the company or because of the scenery. Some favourites mentioned were hitch-hiking from Hanmer springs to Collingwood, driving to Milford Sound, driving through Arthurs Pass, the Taieri Gorge train trip and the inter-island ferry trip.

A common reason for an event being the highlight was that they felt it was authentic. They felt satisfaction and personal achievement from an activity which required personal input and effort (for example, tramping and climbing). Some enjoyed a place because there were no tourists around. Many FITs mentioned that they felt a place was special because they felt comfortable and enjoyed the atmosphere.

Apart from enjoying particular places, journeys and activities, some FITs said their highlight was contact with other people, be they friends, relatives or strangers whom they had met during their holiday. Being invited into a stranger's home was an important event, as FITs enjoyed the company, generosity and trust of New Zealanders who had hosted them. Sometimes the contact was a short conversation; other times it was an invitation for a meal or to stay the night. One FIT said 'Meeting other people gives a new personal perspective', supporting Buryn's (1983) belief that by becoming involved in other people's lives we learn more about ourselves.

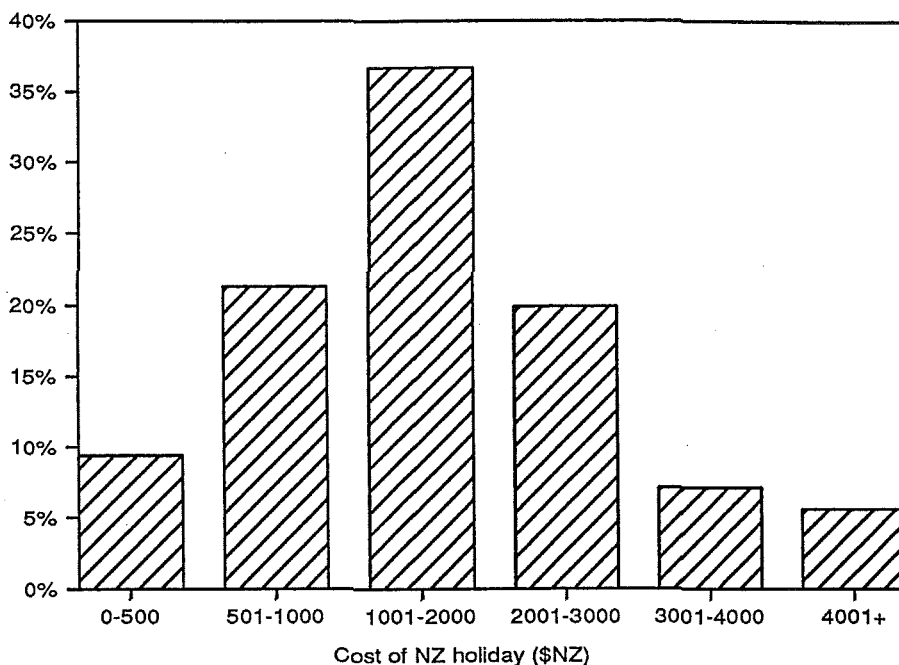
5.2.2.9 Expenditure

Details of expenditure patterns of FITs; the total daily expenditure, most extravagant expenditure, when they spent most money and on what they spent most money are contained in this section. For a comparison of expenditure between FITs and Tourists see Section 4.2.

The total expenditure of FITs during their holiday in New Zealand is illustrated in Figure 19. The data used is the same as in Table 4. The cost of FITs holidays in New Zealand (all costs excluding international travel) ranged from \$160 to \$11,600 with a mean expenditure of \$1850. The cost of the holiday varied greatly, the standard deviation being \$1365 being about two thirds of the mean \$1949. Holiday expenditure does not

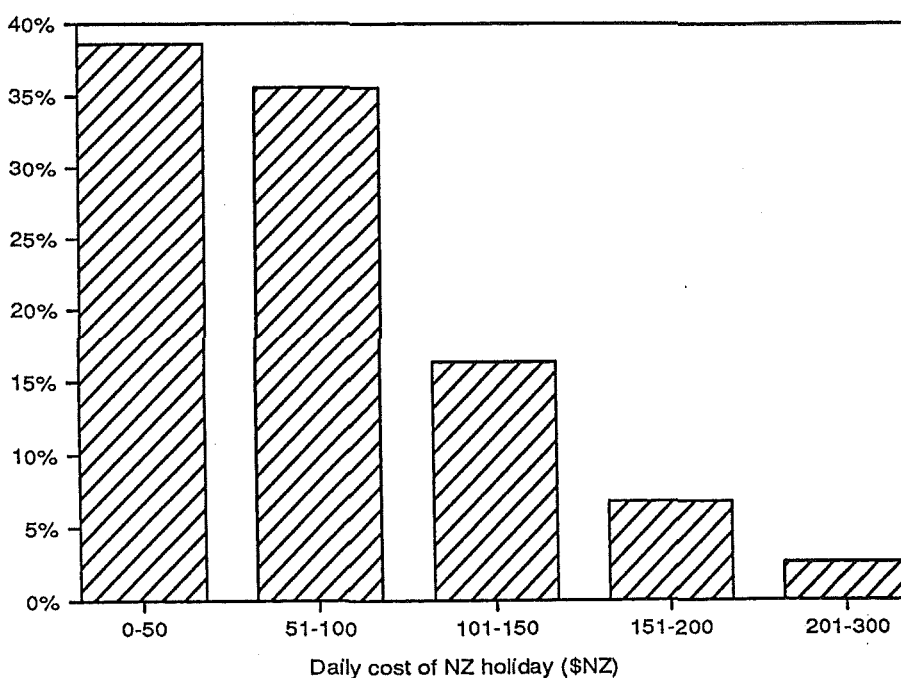
include the cost of transport to New Zealand. A surprising number of American FITs mentioned that they were flying with frequent flyers tickets. Travellers who travel frequently, say for business, can get free tickets from particular airlines.

Figure 19. Expenditure in New Zealand



The daily expenditure was derived by dividing the cost by the length of stay. The pattern of daily expenditure of FITs is shown in Figure 20.

Figure 20. Daily expenditure in New Zealand



The daily expenditure of FITs ranged from \$7 to \$260, with a mean value of \$76. The median value was \$67 and the mode \$100. Many FITs spent less than \$50 per day during their stay in New Zealand.

FITs were asked to specify their most extravagant expenditure and its cost. The frequency, rather than the percentage, of each type of extravagant expenditure is shown in Table 15. This is to minimise confusion created in that a large proportion of FITs said they had no extravagant expenditure.

Table 15. Most extravagant expenditure

Frequency	Most extravagant expenditure	Price (NZ\$)	
		minimum	maximum
	<u>Activities</u>		
12	helicopter flight	70	160
10	ski-plane flights	80	150
13	scenic flight unspecified	40	270
6	rafting	50	100
6	boat trip	23	80
4	combination plane, bus and boat trip	60	120
4	jet boat	33	50
3	fishing trip	200	230
2	sailing	40	44
2	hang gliding	20	115
1	canoeing	22	
1	skiing	-	
1	day tour	75	
1	jet skiing	15	
1	Milford walk, independent	80	
1	museum	6	
	<u>Accommodation</u>		
11	accommodation unspecified	40	230
2	the last nights accommodation	99	160
1	first nights accommodation	139	
1	staying at a hostel	15	
1	THC Milford	140	
	<u>Food</u>		
14	meal unspecified	20	368
4	meal on last night	25	200
2	meal taking friends out	100	460
2	hangi	30	60
2	beer	4	15

Table 15. continued

1	chocolate	72	
1	ice-cream	50	
1	crayfish	60	
1	poached eggs on toast for breakfast	14	
	<u>Purchases</u>		
7	souvenirs unspecified	118	600
9	jumper/s	50	450
2	carvings	100	250
3	leather jacket	350	600
3	jewellery unspecified	70	800
3	rain jacket	116	
2	post	27	30
1	jewellery greenstone	200	
1	jewellery pearl	200	
1	earrings	240	
1	necklace	42	
1	presents unspecified	20	
1	spinning wheel	650	
1	sheep skin under blanket	240	
1	blanket	48	
1	Footrot Flats dog	17	
1	a china kiwi	100	
1	souvenir sheep	70	
1	duffelcoat	163	
1	camera	100	
1	watch	132	
1	backpack	325	
1	a sheepskin posted home	350	
	<u>Transport</u>		
1	bought a car	950	
1	bought a motor bike	400	
1	bought a bicycle	280	
1	rental car	-	
1	taking a campervan on the ferry	300	
1	bus ride	45	

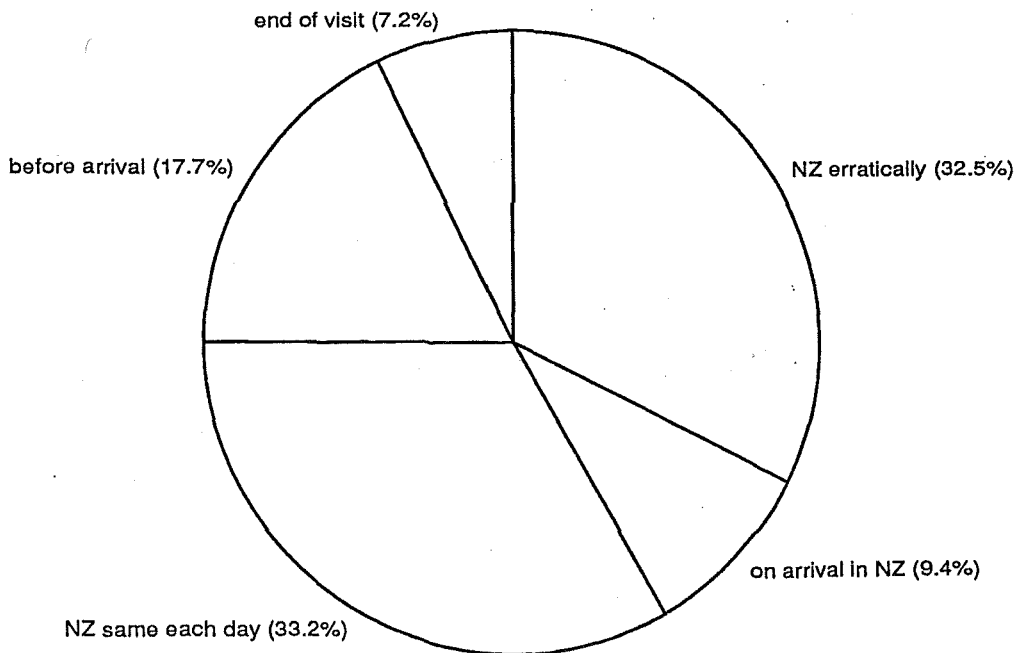
FITs most extravagant expenditures were on activities, accommodation, food and souvenirs. Thirty-seven percent of FITs said they had no extravagant expenditure in New Zealand. Many of the extravagant expenditures cost more than \$300. Although FITs are on moderate budgets some are willing to spend a large amount of money on something they thought was special.

There was some confusion among FITs as to the meaning of 'extravagant'. The question asked was 'What was your most extravagant single expenditure?'. To some

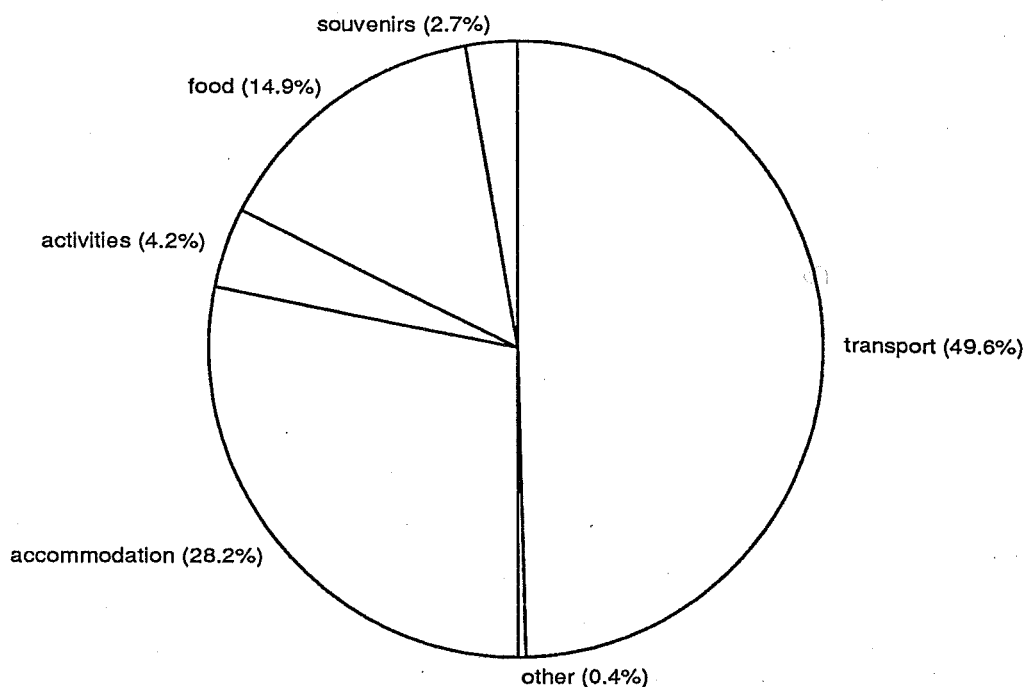
FITs 'extravagant' was a luxury or an indulgence in something special. Other interpreted 'extravagant' to mean that the purchase was a mistake, that they had been ripped off buying something that was overpriced. Thus the definition of extravagant was purely that of the FITs and no consistency between respondents was attempted. If the study were to be repeated, this question should be amended to clarify the meaning.

Figure 21 is a pie chart of when FITs spent the largest proportion of their money. The expenditure patterns of FITs varied. Some spent about the same amount of money each day, sticking to a pre-determined budget. Others spent money erratically. Those who went on overnight tramping trips, stocked up on food and then spent little for several days. FITs who had pre-paid for transportation frequently spent most before they arrived in New Zealand. A minority spent most on arrival, either on extravagant accommodation or on holiday preparations, buying suitable equipment for New Zealand conditions. Some did most of their expenditure at the end of their holiday, paying off vehicle hire or purchasing souvenirs.

Figure 21. When spent most money



From Figure 22 it is evident that transport was the greatest expense for the majority of FITs. Many also cited accommodation and food as their greatest expenditures. 'Other' was a fine to get out of jail for being drunk and disorderly.

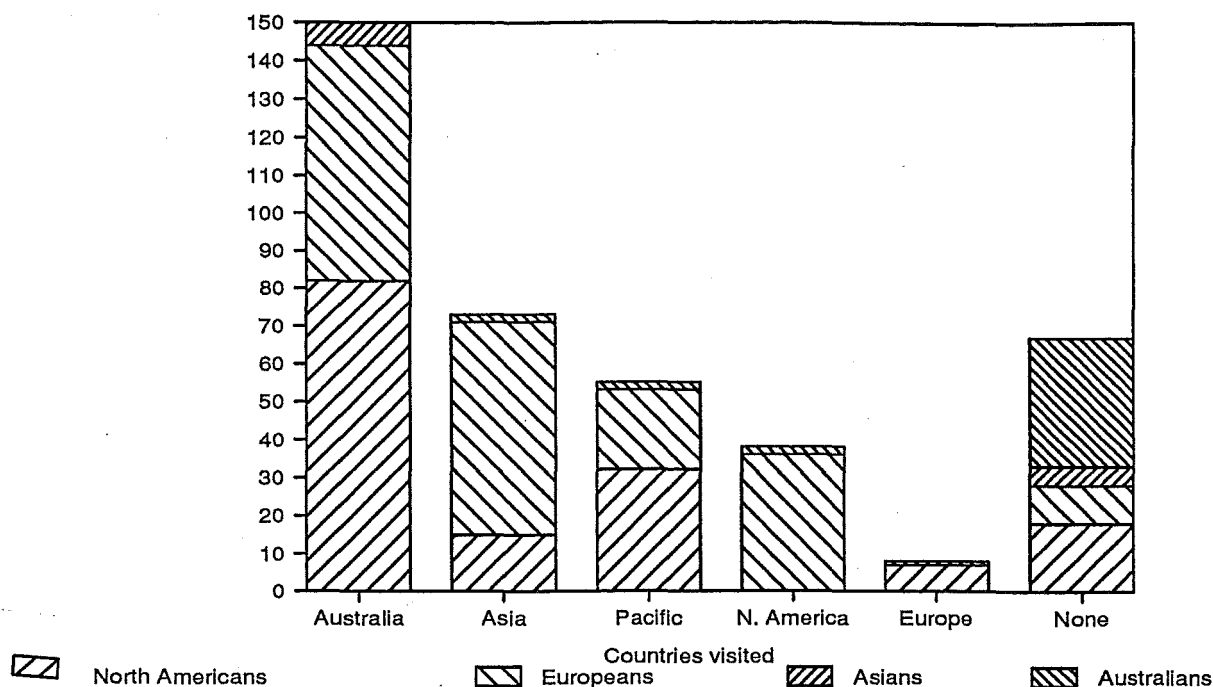
Figure 22. Greatest expenditure

There were significant differences in the expenditure patterns relating to the length of stay. When the FIT sample was classified by length of stay, the long stayers (more than one month) tended to spend their money in bursts (41%) or the same amount each day (40%). The largest proportion of their expenditure went towards accommodation (38%) and food (21%). Twenty-five percent of the medium stayers (15 - 31 days) said they spent most money before arrival. The majority (60%) of medium stayers spent most money on transport. The short stayers (up to fourteen days) cited transport and accommodation, rather than food, as their greatest cost.

5.2.3 Holiday destinations other than New Zealand

In addition to visiting New Zealand on their holiday, most FITs visited other countries. To simplify the data, countries have been grouped into regions (see Appendix C for groupings). Travel inside the region of residence has been disregarded. Three quarters of FITs visited at least one other region and 46 percent visited at least two other regions in addition to New Zealand. FITs were most likely to visit Australia as part of their holiday.

Figure 23. World regions visited on this holiday



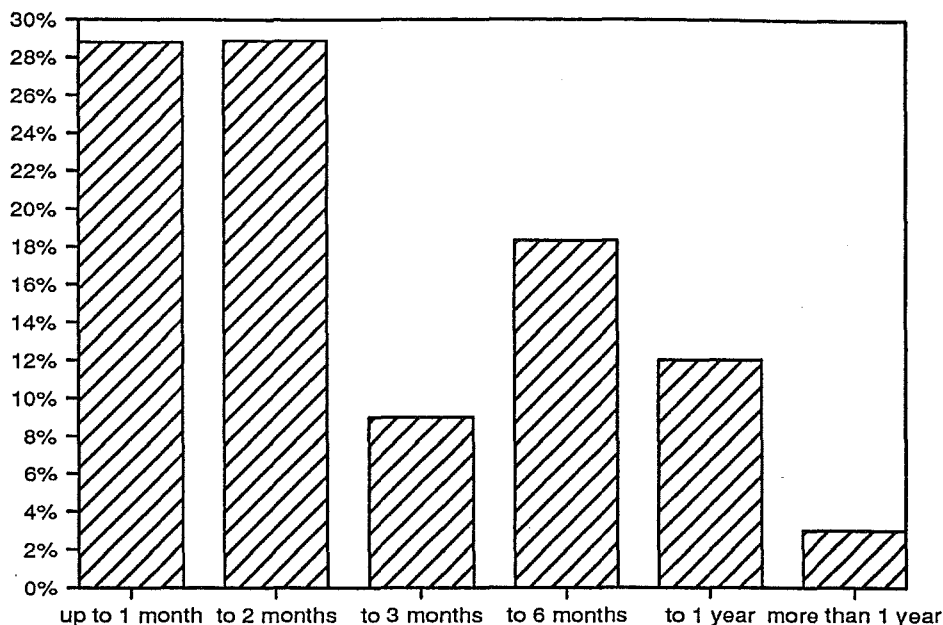
In Figure 23 the number of FITs who had also visited other regions on this holiday is shown. It can be seen that 150 FITs also visited Australia on this holiday. If FITs were grouped into resident regions, the travel pattern is more distinct. Each bar in Figure 23 has been segmented into the country of residence of the FIT. For example of the 150 FITs who also visited Australia, 82 were North American, 62 were European and six were Asian.

Those FITs from the furthest residences were more likely to visit many destinations during the holiday. Eighty-five percent of Australians did not visit any countries other than New Zealand. Fifty-five percent of the Asian FITs visited Australia as part of their holiday and 45 percent travelled only to New Zealand. North Americans were the most likely to also be visiting Australia (75%). Thirty-two of the 110 North Americans (29%) visited the Pacific. Most of the Europeans (90%) visited at least one other region; 62 percent visited Australia, 56 percent visited Asia and 38 percent visited North America.

The total length of the FITs holiday (New Zealand and other destinations) ranged from six days to three years with a mean of about four months. The proportion of FITs in each class of length of total holiday is shown in Figure 24. Those FITs on the longer

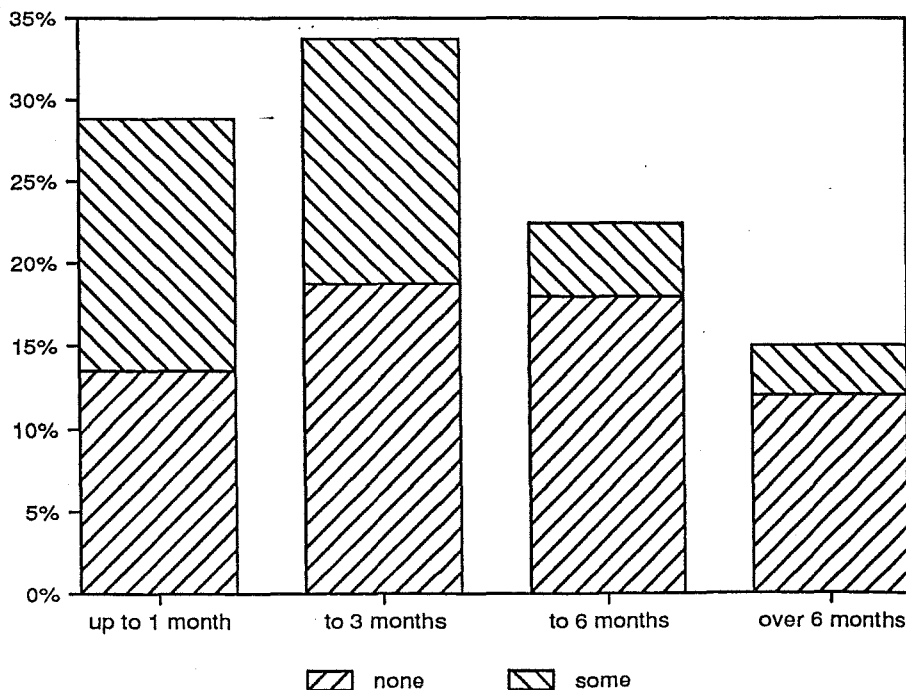
holidays (more than one month) had either left their jobs, worked seasonally or were retired. They had often saved and planned this trip far in advance.

Figure 24. Length of holiday, New Zealand and other regions



It is interesting to examine the differences between those on short and long holidays. The length of total holiday has been segmented into the proportion who had made some/none bookings before their arrival to New Zealand.

Figure 25. Bookings and length of holiday



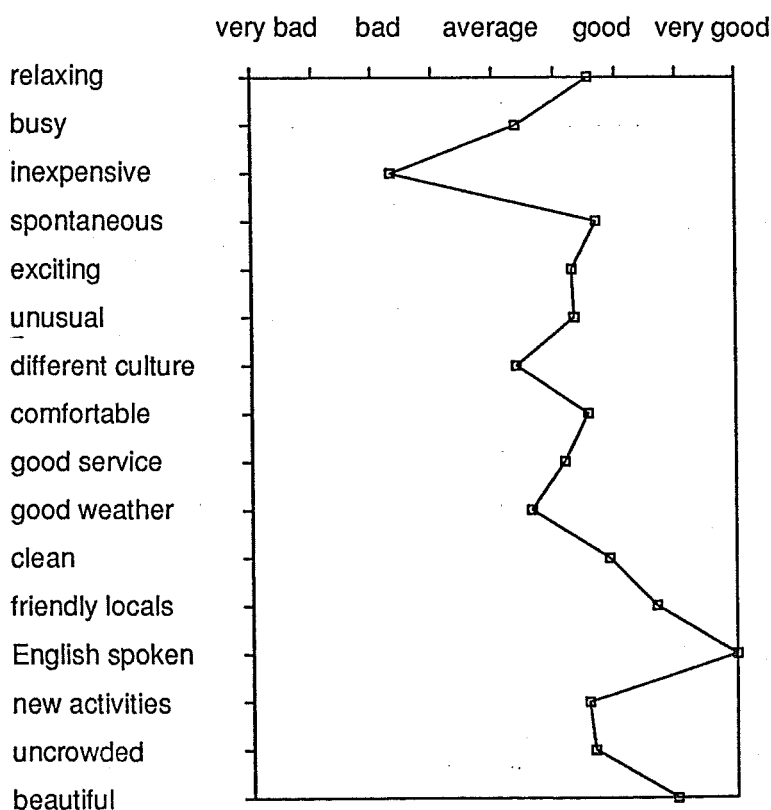
In Figure 25, it can be seen that there is a relationship between the length of holiday and the proportion who had made some arrangements prior to arrival. For those taking relatively short holidays (less than one month) just over half (53%) had made some arrangements before they arrived in New Zealand. At the other extreme, those whose holiday lasted more than six months, were unlikely (20%) to have made any arrangements before arriving in New Zealand.

5.2.4 Holiday satisfaction

5.2.4.1 Rating holiday characteristics

FITs were asked to rate holiday characteristics on a scale ranging from very bad through average to good. The average rating of the FIT sample has been plotted against each factor shown Figure 26.

Figure 26. Holiday satisfactions

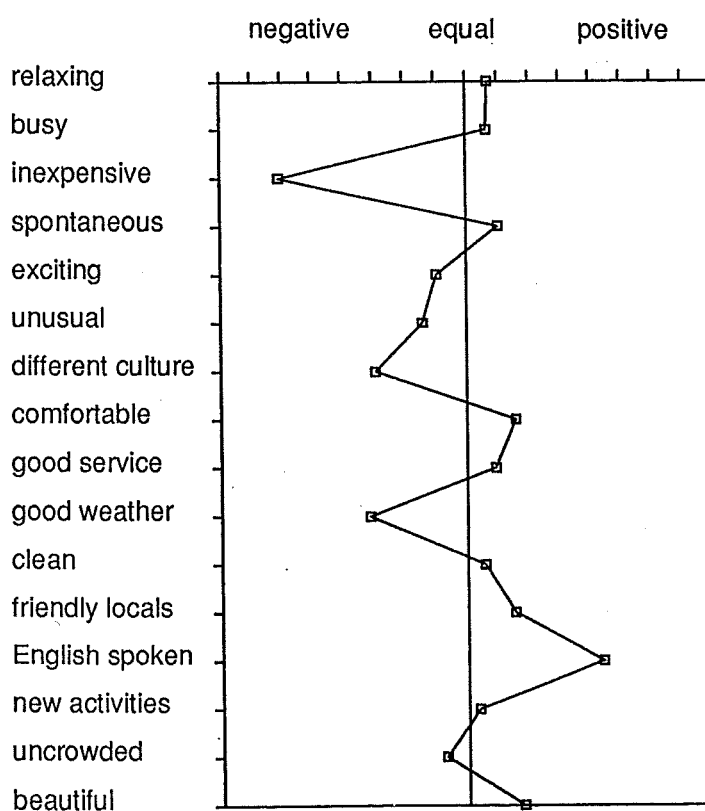


It can be seen in Figure 26 that all FITs agreed that English was spoken in New Zealand. FITs also rated highly that New Zealand was beautiful, clean, uncrowded, relaxing, comfortable, unusual and exciting, the locals were friendly, they could do things at short notice, they could try new activities and the service was good. They scored New Zealand low on good weather, busy and inexpensive and that New Zealand had a different culture.

Comparing holiday satisfactions with holiday preferences

A more sophisticated method of analysing holiday satisfactions was to weight each holiday satisfaction with its importance. This is illustrated in Figure 27.

Figure 27. Weighted holiday satisfactions



Taking into account the preferences of each characteristic, those characteristics which were above the desired level were English spoken, beauty, comfort, friendly local people, service, relaxing, busy, could do things at short notice, could try new activities.

Those holiday characteristics which were well below the desired level were expense, weather and different culture. Characteristics which were marginally below the desired level were, excitement, unusual and uncrowded.

Expense

FITs said that the prices in New Zealand were much higher than they had been led to believe. Some said that if they had known the cost they would not have visited New Zealand. Several FITs changed their plane tickets and left New Zealand earlier than originally planned, choosing to have the rest of their holiday at a less expensive destination. The only product which was considered good value was playing golf. New Zealand was described as the 'Switzerland of the Pacific' by one FIT, because of the beautiful scenery and high prices.

Weather

In the period that FITs were travelling in New Zealand, some parts of the country were severely affected by bad weather. Cyclone Bola hit the north and east of the North Island causing wind rain and disruptions to activities.

Different culture

Most people said that they liked a different culture in a holiday destination. Those FITs who had travelled in less developed areas in Asia, Africa or South America were more likely to say that New Zealand was similar to their own culture. New Zealand is a westernised, developed country relatively similar to the residences of most FITs.

5.2.4.2 Problems arranging the holiday

Eighty-seven percent of FITs said they had no trouble arranging their holiday. Some FITs had normal travellers complaints :

- prices were out of date,
- travel agents making incorrect bookings and
- flights required were full.

FITs from countries where New Zealand is not well known had trouble making bookings through local travel agents. Some FITs said they had trouble finding information for the independent traveller from travel agents. Travel agents were pushing them into going on a package tour for two reasons :

- they have no other information and
- to get commission for products sold.

For example, while New Zealand is famous for its tramping, the only travel information available in overseas travel agents is a brochure to walk the Milford Track as a guided walker. Many travellers who are experienced trampers are not interested in guided walks. Several FITs said they no longer go to a travel agent for any bookings as they get better deals by dealing direct with the airlines and travel wholesalers.

5.2.4.2 In hindsight

Sixty-one percent of FITs said that they would make no changes to their holiday if they could do the trip again. The other 39 percent said they would make at least one change if they were doing the trip again.

Ten percent would have liked to stay longer in New Zealand so they could travel slower and have a more relaxing holiday. Four percent would have liked to have had more money with them. Some would have made changes even before they arriving such as learning more about New Zealand before their trip. Others would have bought more camping equipment; especially mentioned were a tent and camp stove. Within New Zealand some would have made changes to their transport, accommodation or activities.

Several FITs would have changed their main form of transport. Some who relied on public transport or hitch-hiking found it difficult to get to remote destinations. Next time they said they would hire a vehicle, preferably a campervan if they could afford it. Some would change the company they hired a vehicle through believing they would get a better vehicle. Some of those who stayed a long time would buy a vehicle rather than hiring one. Many FITs did not realise the inter-island ferry is heavily booked in the summer. Some had to wait in Picton or Wellington before they could continue their holiday. If they were doing the trip again, they would consider booking.

One FIT said she would get vouchers for motels that had kitchens instead of arriving at hotels that had no cooking facilities. Several FITs said they would have liked to have done more activities such as tramping, cycling, meeting locals, farm stays and hiring a boat.

As well as the travel components, some FITs would have changed their itinerary. Four percent of FITs said they would have preferred more of their time in the South Island. Some FITs felt that they stayed too long in Auckland and would have had a more relaxing holiday if they had left Auckland sooner.

One FIT said she would use cash withdrawal on a credit card instead of using travellers cheques if they were visiting New Zealand again.

New Zealand is advertised as a small country. Those who drive around both islands in two weeks, find that they are exhausted. If they were to do it again they would either have a longer time in New Zealand, or travel only in one island.

FITs are frequently visiting many countries on their holiday. Some would have changed their holiday itinerary so that New Zealand came earlier or later. Some FITs found New Zealand boring, wet and expensive in comparison with Asian countries.

FITs were critical of their own holiday plans. They took pride on getting value for money and achieving a good holiday for themselves. They take their holidays seriously, learning from each holiday experience. The most frequent problem was lack of up to date unbiased information.

5.3 Demographics

5.3.1 Age and sex

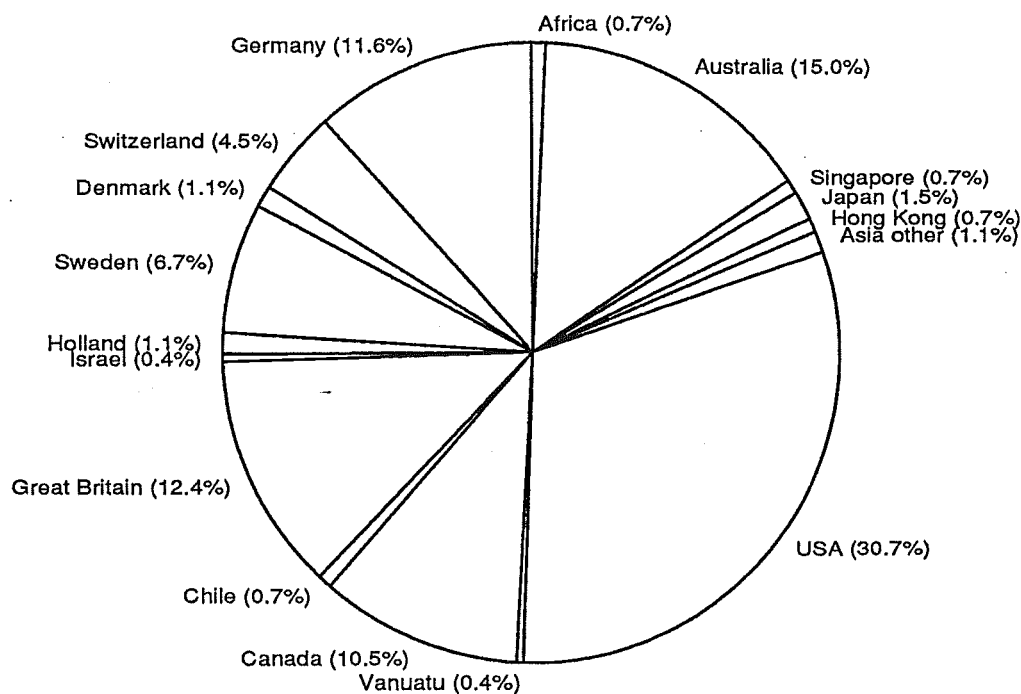
It can be seen in Figure 5 (Section 4.3.1) that approximately two thirds of FITs are male. The youngest FIT interviewed was seventeen and the oldest 75. The mean age of FITs is 36 years and the mode is 24. The difference between the mean (36) and the mode (24) is caused by the bimodal distribution; a peak in the early 20's, and another peak in the late 50's. A possible explanation for this may be that people in their 30's and 40's tend to have school aged children, so they would be unlikely to be on holiday in February

and March. People travelling at this time may be taking advantage of off peak prices, the lower number of tourists and the summer weather. For a comparison of age and sex of FITs with Tourists see Section 4.3.1.

5.3.2 Country of residence

The proportions of FITs from each country of residence are shown in Figure 28. The largest single category for country of residence is the USA. Grouping countries into regions, the largest region of residence was North America (USA and Canada with 41.2%). The importance of Europe is more obvious by combining the residents of Great Britain, Holland, Sweden, Denmark, Switzerland, and Germany to account for 37.4 percent of FITs.

Figure 28. Country of residence



Residences geographically close to New Zealand, (Australia, Asia, the Pacific Islands and South America), only account for twenty percent of FITs. Few residents of Asia and the Pacific Islands are FITs. In most cases those FITs who are resident in China,

Korea, Hong Kong, Singapore, Brunei and Vanuatu are not natives of that country. They are frequently Europeans working abroad for several years and taking advantage of living in the Pacific as an ideal opportunity to travel to New Zealand. For a comparison of FITs' and Tourists' country of residence see Section 4.3.2.

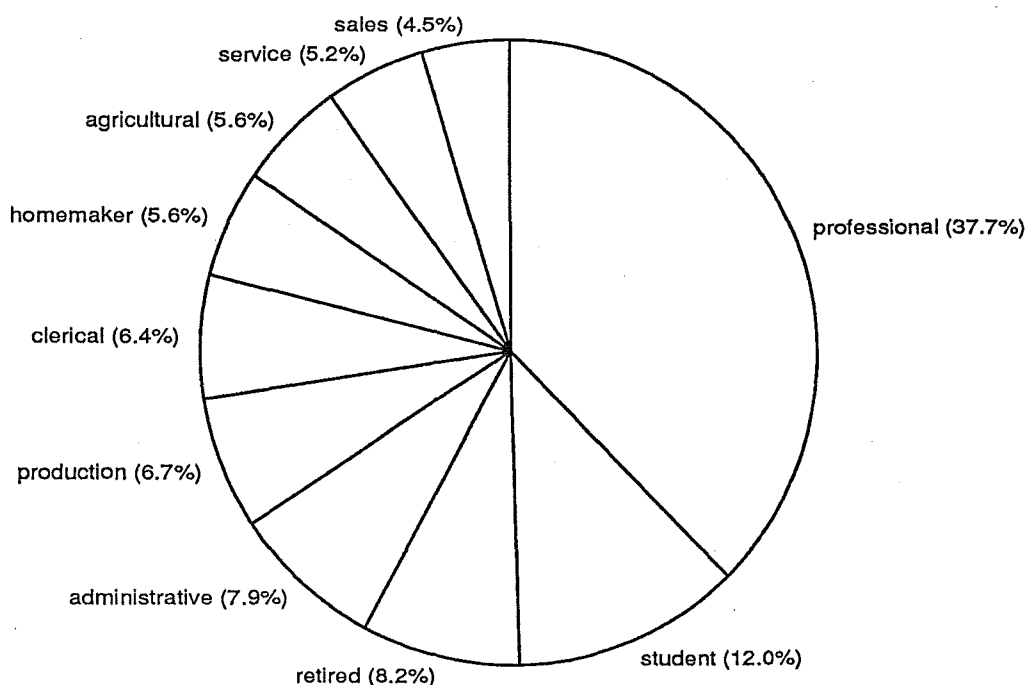
5.3.3 Urban or rural residence

Over two-thirds of FITs live in urban areas (cities and suburbs). Some FITs live in rural areas and only a few are from isolated areas.

5.3.4 Occupation

The proportion of FITs in occupational classes is shown in Figure 29. The largest single occupation category is professional and the second largest category is student. Each of the other occupation classes account for between five and ten percent of FITs. Job security is not a high priority for some FITs as several had resigned or taken extra leave from their job for their holiday. Some FITs mentioned that they were considering moving to New Zealand and working here. For a comparison of FITs' with Tourists' occupations see Section 4.3.3.

Figure 29. Occupations



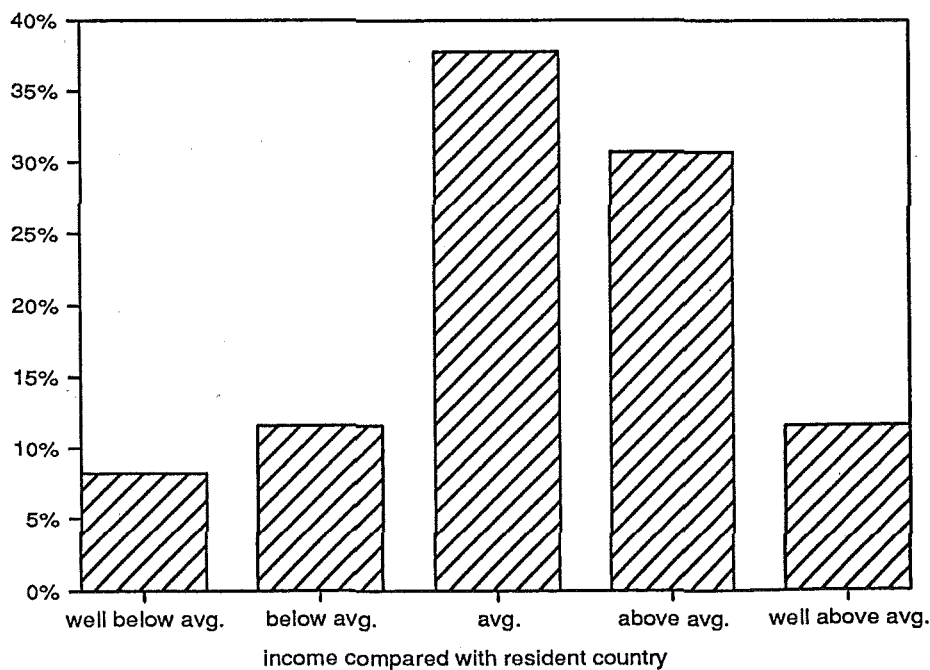
5.3.5 Repeat visits

Less than fifteen percent of FITs had visited New Zealand before. Most FITs agreed with the AIO statement relating to vacation gregariousness saying 'When I have a choice, I would rather travel to a new place and meet new people'. This implies that FITs are likely to holiday only once at a destination, choosing to go somewhere else for the next holiday. For a comparison of FITs' and Tourists' previous number of visits to New Zealand see Section 4.3.4.

5.3.6 Income

To cater for differences in countries economies, FITs were asked to compare their income to the average of the country in which they are resident. The question assumed that FITs knew the average income of their resident country.

Figure 30. Income



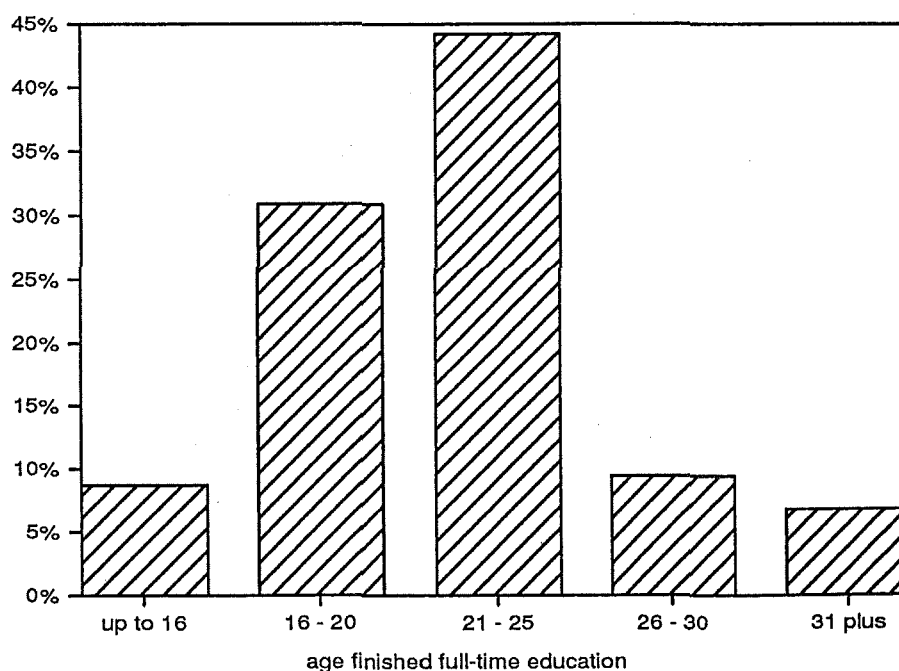
From Figure 30, it can be seen that FITs do not belong to any one income category. They range in all income categories from well below average to well above

average with the majority in the average category. International travellers are presumed to be in the upper income categories with a large disposable portion. However, the results above suggest that international travel is also possible for those on below average and average incomes (8.2% + 11.6% = 19.8%). As no studies using a similar question have been found, no comparisons can be made.

5.3.7 Education

A question which would allow for easy comparison between education systems of all countries was 'at what age did you complete full-time education?'. A limitation of this question is that part-time study was not considered. For those FITs who are students their current age was used. The proportion of FITs who completed their education in each age category is illustrated in Figure 31.

Figure 31. Education



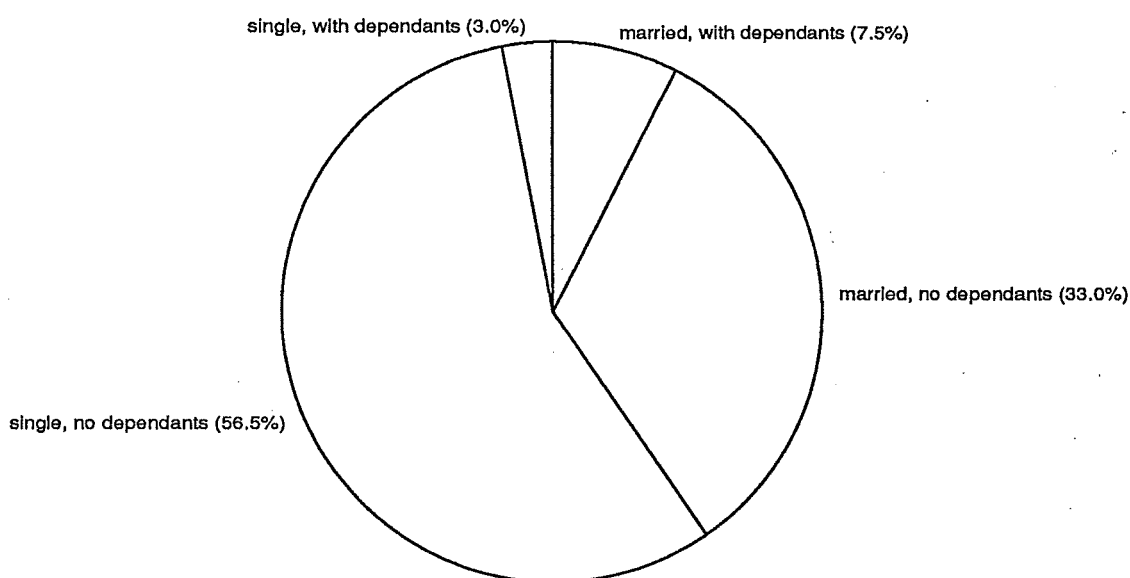
The most frequent answer for age finished full-time education is between 21 and 25. As this question is unique to this study, comparison with previous studies is not possible. For some FITs, (over 16%), education is of considerable importance as they

were still in full time education when aged over 25. The large proportion of FITs in the professional occupations also supports the high level of education of FITs. FITs tend to be high achievers, both in work and leisure, many combining an education, career and travel.

5.3.8 Marital status

The proportion of FITs in each marital status category is shown in Figure 32.

Figure 32. Marital status



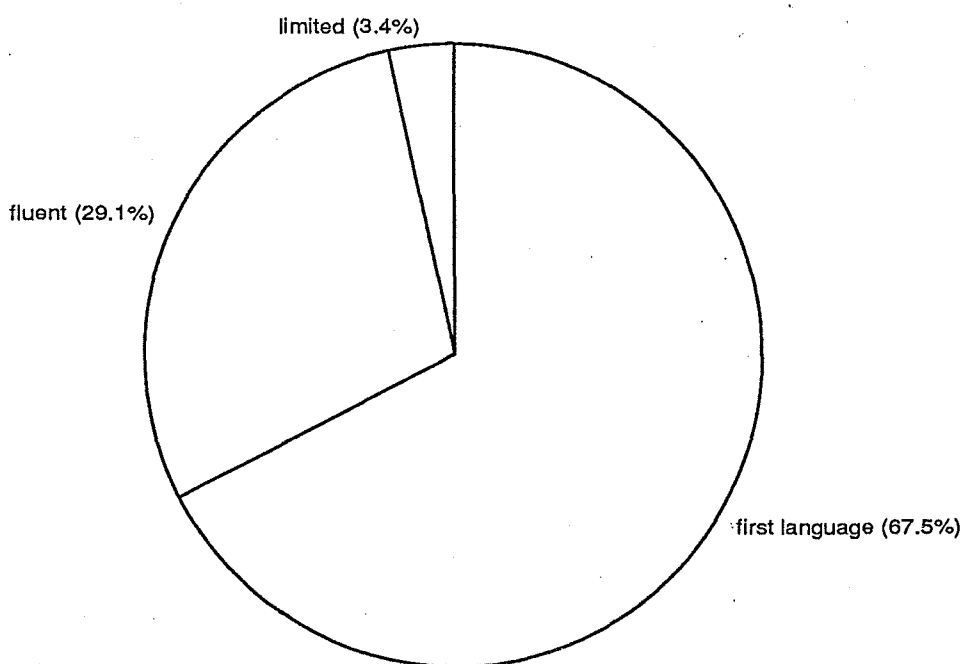
The majority of FITs do not have dependants (children or parents whom they were supporting). There are more single FITs than married. As was seen for the age of FITs, the seasonal bias of the study may have influenced the results. The interview period was out of school holidays and travellers who have school aged dependants would be unlikely to be travelling at this time.

While the category of single/married seems well defined, differing societies place different emphasis on its importance. The northern European FITs, especially the Swedish were unlikely to be legally married even though they had life long partners.

5.3.9 English ability

Levels of English ability of FITs are shown in Figure 33. English is the first language of most FITs. Of the other FITs, most are fluent English speakers as they have studied English at school, have travelled or worked in English speaking countries. FITs with limited English ability were mostly Japanese or Asian who all carried language dictionaries so they could translate anything they did not understand. Travellers who cannot speak English would have difficulty travelling independently in New Zealand. Only one traveller who was identified as a FIT did not complete the interview. Because of the difficulty in translation the interview took longer than normal and the interview was not finished before the final boarding call for the flight.

Figure 33. English ability

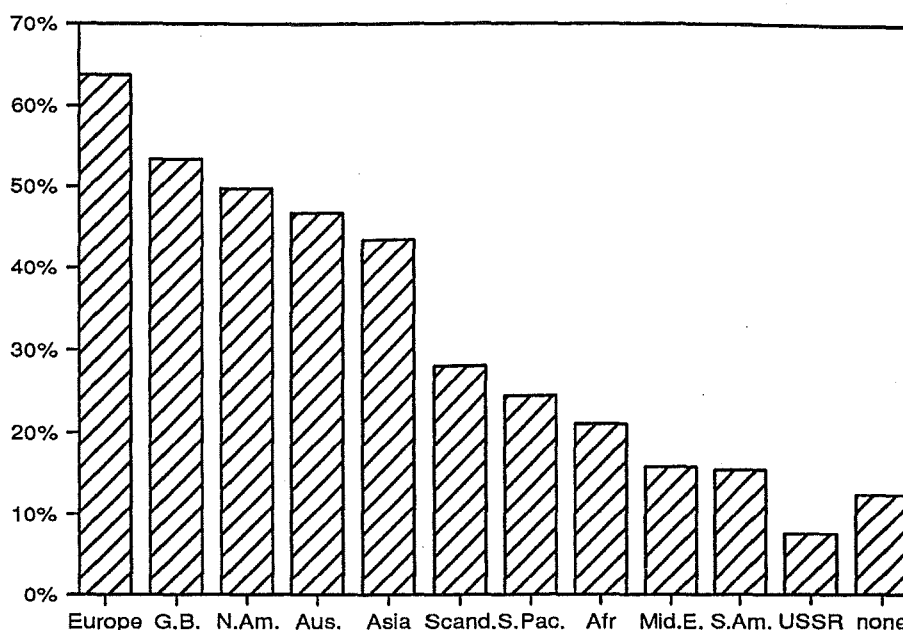


5.3.10 Previous world travel

FITs were asked which parts of the world they had visited previously. Countries which they had already visited on this holiday were included, but the countries they intended to visit after New Zealand were not. Their home region was not included. The

percentage of FITs (not resident in a region) who had visited that region is shown in Figure 34. For example 141 of the 241 non central European FITs had visited Europe.

Figure 34. Previous world travel



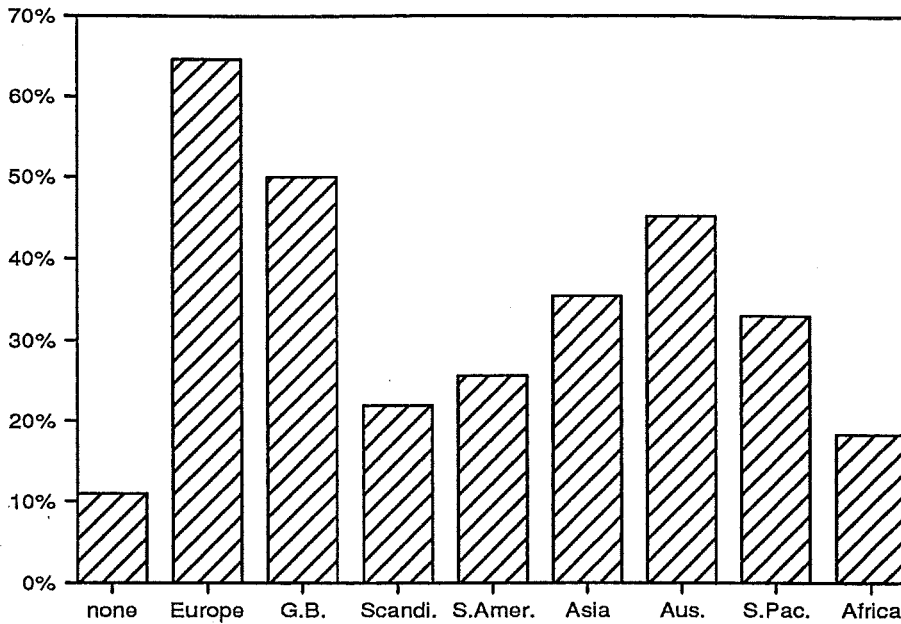
More than half of the non central European FITs had travelled to Europe. Great Britain, Asia and Australia had also been visited by many FITs. More than ten percent had also travelled in South America or Africa. Only 12.3 percent of FITs had not travelled out of their own region before. FITs have a lot of travel experience before they holiday in New Zealand.

FITs were asked to specify the main reason for their previous travel. Of those who had travelled previously, the major reason was holiday and leisure. The second most frequent reason was full-time work consisting of military service abroad or company secondments. Some FITs travelled frequently for business and conventions. For a few FITs the main reason had been to visit friends and relatives and some had travelled for education or working holidays.

Plog (1974), discussed in Section 2.5.4, classified people into personality types who would visit different types of countries. New Zealand as a holiday destination for Americans would only be visited by allocentrics. Using data only of FITs from the USA, Plog's hypothesis of travel destination and personality type was examined. The proportion of FITs from USA who had previously travelled to long haul destinations is

shown in Figure 35. Previous holidays within the USA were not considered in the FIT study, so no comments can be made about the left hand side of Figure 2 (Section 2.5.4).

Figure 35. Previous travel of FITs from the USA



Plog proposed that personality is related to choice of holiday destination. A large proportion of the FITs from America had travelled extensively. Nearly all (90%) of the USA FITs had travelled out of North America before this trip. A relatively large proportion (18.3%) had travelled to Africa where Plog theorised that only the strongly allocentric American would travel. Many FITs have also visited the other Allocentric regions (Asia, Australia and South Pacific). Those FITs who holiday to New Zealand have previous travel experience, frequently to remote and uncomfortable destinations. This is consistent with Plog's allocentric personality type.

5.4 Lifestyle

5.4.1 Introduction

The final section of the model relates to central life interest. The goal is to identify the motivations, expectations, preferences, wants and needs of individuals. Tourism research has developed from purely quantitative head counts of country of origin and marital status to a fuller appreciation of consumer purchasing. A method of assessing a persons central life interest is to use an Attitude, Interest and Opinion (AIO) inventory and holiday preferences.

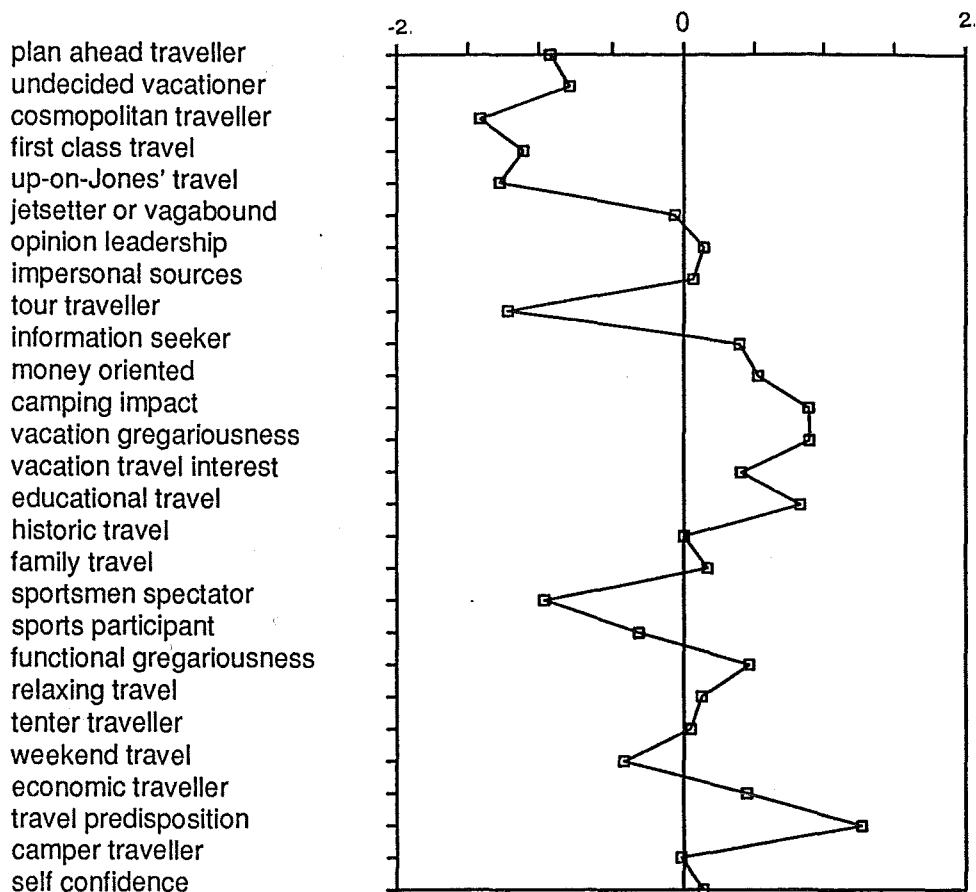
5.4.2 Attitude, interest and opinion inventories

In the FIT study an attempt was made to identify the lifestyles of FITs. AIOs from Perrault *et al.* (1977) study were used as they had demonstrated effective indicators of lifestyle. It is noted that the Perrault *et al.* (1977) study is over ten years old and the sample was from the North American population, but this is not considered to have affected the results significantly.

A similar method for analysis and presentation of Perrault *et al.* (1977) was used in this study. The sample was asked to score each AIO statement from strongly disagree to strongly agree. The results were then graphed, the mean of each segment plotted against the AIO. The same presentation is used in Figure 36 as that used by Perrault *et al.* (1977) shown in Figure 1 (Section 2.4.2). Each lifestyle characteristic on the left hand side is rated as to agreement or disagreement. The average of all the FITs interviewed is plotted. For example FITs have a very high travel predisposition.

There appears to be little correlation between Figure 36 and Figure 1. FITs do not closely resemble any one segment as identified by Perrault *et al.* (1977). Some of the attributes are close to Perrault *et al.*'s 'Adventurer' while many are extreme of all five lifestyles found.

Figure 36. Lifestyle profile of FITs



Those FIT characteristics which are extreme of all those groups of Perrault *et al.* (1977) are :

- travel predisposition (much higher),
- camping impact (much higher),
- vacation gregariousness (higher),
- self confidence (higher),
- information seeker (higher),
- money oriented vacationer (higher),
- plan ahead traveller (lower),
- undecided vacationer (lower),
- Cosmopolitan traveller (lower),
- first class traveller (lower),
- One-up-manship travel (lower) and
- sportsmen spectator (lower).

Those characteristics closest to **Adventurers** are :

- camper traveller,
- functional gregariousness,
- tenter traveller,
- opinion leadership,
- impersonal sources and
- camper traveller.

Those characteristics closest to **Homebodies** are :

- sports participation,
- homebodies and
- tour traveller.

Those characteristics closest to **Vacationers** are :

- educational travel and
- travel interest.

Those characteristics closest to the **Moderates** are :

- familial traveller and
- Jet setter or vagabond traveller.

Those characteristics closest to **Campers** are :

- historical travel and
- economic traveller.

There were drawbacks of using Perrault *et al's* (1977) AIOs statements directly. The American language did not flow with the rest of the interview. Alternating between the words holiday and vacation was confusing especially for those whose first language was not English. Apparently camping means using a motor home as opposed to tenting using a tent.

There were some assumptions inherent in the statements. For example, 'On vacation, I often eat at the more economical restaurants'. This statement assumed that people ate at restaurants when on holiday. For FITs this was not necessarily correct.

It was difficult for the interviewer to quantify the relative statements. For example, 'I prefer to take several short vacations rather than a few larger ones'. To an American, with fourteen days annual leave, a short vacation may mean long weekends while to the long term traveller a short holiday may mean a fortnight.

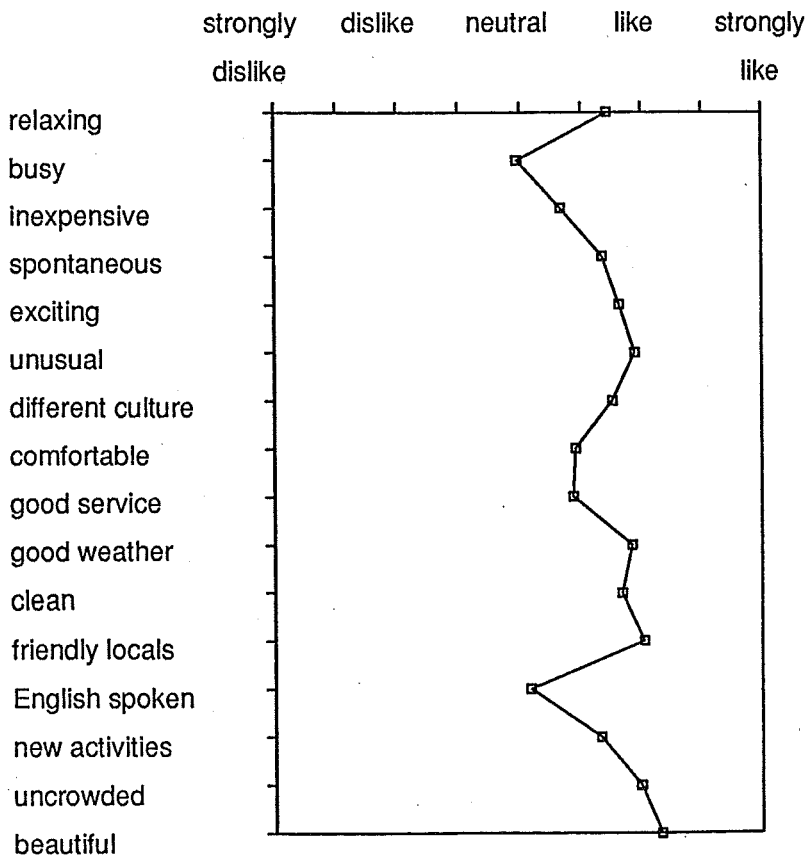
Even though the wording was not ideal, the results were clear. FITs have particular lifestyle characteristics. FITs are highly motivated travellers. Their self-confidence, gregarious nature and interest in information make it possible to travel without a guide or pre-arranged itinerary. Value for money is important. They are not interested in spectator activities. The low scores on cosmopolitan and one-up-manship

indicate intrinsic motivations rather than comfort or snob value. FITs scored low on plan ahead travel and tour traveller. Their increased information and travel experience may be associated with the level of agreement on overcrowding of camp sites (camping impact). In some characteristics FITs are highly demanding. For example, value for money, low impact considerations and good information sources are vital. On other characteristics they are not concerned. For example, lack of comfort and a change of plan would not bother FITs. They like activities in which they can participate rather than observe from a distance. FITs are interested in more than just the beautiful sights New Zealand has to offer; they are also interested in New Zealand's politics, wildlife, economy and culture.

5.4.3 Holiday preferences

FITs were asked to rate each holiday factor on scale of strongly dislike to strongly like for their ideal holiday. The average of each factor calculated to give a level of importance representative of FITs is illustrated in Figure 37.

Figure 37. Holiday preferences of FITs



The highest rated holiday factor is beauty. Other holiday factors which FITs rated highly are friendly local people, uncrowded, the unusual, good weather, exciting, clean, different culture, new activities, spontaneity and relaxation. The other factors, comfort, good service, inexpensive, English spoken and busy were close to neutral. FITs rated novel and unique qualities higher than characteristics associated with security and comfort. None of the factors were disliked.

5.4.4 Discussion

The lifestyle of FITs is similar to that of Plog's allocentric. According to Figure 2, for the American market, New Zealand is only a destination for the strongly allocentric personality. This market is only a small segment of the American population and would be lost in the clusters Perrault *et al.* (1977) found.

The lifestyle characteristics of FITs are close to the 'New Enthusiasts' and 'Anti Tourists' described in NZTP (1985a). Their personality is egocentric, idiosyncratic and non-conformist. They are adventurous and inquisitive; seeing and doing new things. They choose to be mobile, valuing the ability to move on and not tied down. They will walk, ride, drive even sail but they will not be led.

They plan their holiday to small detail to maximise the use of their holidays. They choose a holiday which offers diversity and newness and challenge. They will spend, travel or decide on impulse and value the outcome more because it was impulsively motivated rather than planned. FITs are fascinated by different cultures and hunger for experience, difference and challenge. They place a high priority on absorbing and being absorbed by a new place, culture or activity; preferring active rather than passive. They find tourist resorts confining and artificial. They like to get value for money, spending selectively but well.

FITs are sensitive to environment and conservation, insist on authenticity, real food, real people and surroundings true to culture. They prefer to be called 'travellers' rather than 'tourists'.

5.5 Summary

FITs have long holidays in New Zealand, the average being one month. They frequently travel in small groups (couples or pairs). They spend considerably less per day than the average inbound holiday visitor. Most FITs get their information about New Zealand through personal sources (friends and relatives) and from factual information (articles, documentaries and travel guides) rather than from travel agents. Many FITs bring some equipment with them, including backpacks, walking boots and tents. Their transports, accommodation and activities are more and varied compared with the average inbound holiday visitor. Popular transport modes of FITs are rental car, hitch-hiking, rental campervan, bus, private car and bicycle. They choose accommodations which are inexpensive and have cooking facilities including hotel/motel, with friends and relatives, hostels, cabins, tents and campervans. FITs are highly active visitors. The majority visit and stay overnight in national parks, go tramping, visit museums and churches, go on a boat cruise. Many visit art galleries, ride on a gondola, go fishing, visit Waitomo caves, go on the cable car, cycle, jet boat, raft, take scenic flights, go on guided nature tours, and sail. Some participate in less well known activities such as black water rafting. The majority of FITs use a travel guide; the Lonely Planet guide by Tony Wheeler being the most popular.

Most FITs also visit other world regions before or after holidaying in New Zealand. The majority visited Australia and many FITs also travelled in Asia, South Pacific islands and North America. Their total holiday averages approximately four months.

A large proportion of FITs are young and male. Many are residents of the USA, Australia, Great Britain, Canada, Germany and Sweden. Most FITs to New Zealand speak English fluently. A large proportion of FITs are employed in professional jobs and many are students. FITs are unlikely to have visited New Zealand before. The majority of FITs are single and have no dependants.

FITs have similar lifestyle profiles. They are highly motivated travellers, looking for novelty in their holidays, enjoying a challenge, and liking value for money. They are impulsive, gregarious and inquisitive. They search for the authentic and unique opportunities and they dislike being told what they will enjoy.

Chapter 6

Objective C. Lifestyle segmentation of FITs

6.1 Introduction

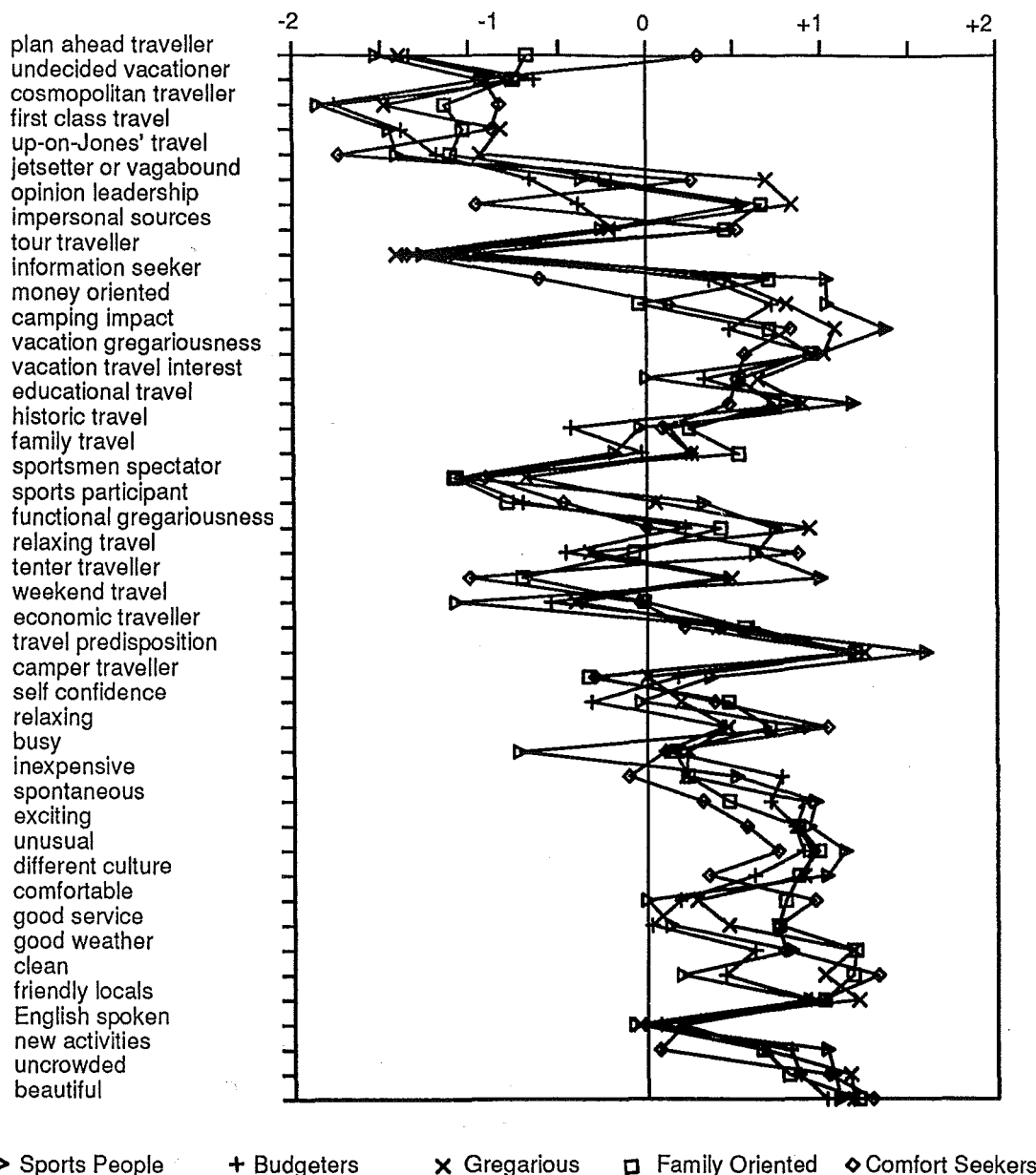
In this chapter, FITs are segmented into more homogeneous groups using lifestyle types. The sample size for the FIT study was 267, a relatively small sample compared with other studies which have used clustering techniques. In spite of the small sample size, there were significant differences in holiday and demographic characteristics of each lifestyle. The statements used were a combination from those chosen by Perrault *et al.* (1977) and a selection of holiday preferences.

Clustering, described in Section 3.4, was used to identify FITs with similar lifestyles. Using 43 variables, five lifestyle clusters were identified. They are named Sports People, Budgeters, Gregarious, Family Oriented and Comfort Seekers. Their lifestyle profiles are shown in Figure 38.

Perrault *et al.* (1977) found statistically significant differences on all but one characteristic (self confidence). In Figure 1 the points are widely dispersed often ranged across the spectrum from strongly inclined to strongly negatively inclined (for example educational travel). In contrast the FIT lifestyles were not greatly different, the points of Figure 38 are sometimes difficult to identify because the lifestyles are close in some characteristics. This indicates that even though FITs are composed of a more dispersed demographic population, they are more consistent in lifestyle characteristics.

The same format is used in Figure 38 as Figure 1 (Section 2.5.4). The mean of each lifestyle segment is plotted on a numeric scale against the lifestyle characteristic, 0 being neutral, +2 being strongly inclined and -2 being negatively inclined. For example Comfort Seekers were slightly inclined to be plan ahead travellers while all the other lifestyles and especially the Sports People were negatively inclined towards planning ahead.

Figure 38. Lifestyle segments of FITs



Using a similar method to Perrault *et al.* (1977), the lifestyle segments were then cross-tabulated against demographic characteristics, holiday behaviour characteristics and holiday satisfactions. The rest of this chapter contains description of the segments identified. Sports People, Budgeters, Gregarious, Family Oriented and Comfort Seekers will be discussed in terms of lifestyle profile, demographic characteristics, holiday characteristics and holiday satisfactions. Percentages are given for the number of FITs in each lifestyle group being discussed who utilised the characteristic being discussed. For example 41 percent of the Sports People were from the USA.

6.2 Sports People, eleven percent of the FIT sample

Lifestyle profile

The Sports People are highly motivated by sports and activities in the outdoors. The fact that international travel is involved may be secondary to their dominant interest of sports participation. A further concern is value for money. Sports People scored high on novelty related traits (spontaneous, exciting, unusual, different culture) and low on security related traits (clean, comfortable, English spoken).

The Sports People rated information seeker, money oriented, travel predisposition, camper traveller, tenter traveller, camping impact, educational traveller, sports participation, spontaneous, exciting, unusual, different culture and new activity, higher than the other lifestyle types. They rated vacation travel interest, plan ahead traveller, undecided vacationer, impersonal sources, weekend traveller, cosmopolitan traveller, sports spectator, family travel, clean, busy, comfortable, friendly locals and English spoken lower than the other lifestyles.

Demographics

Sports People are a relatively young cluster with a mean age of 30 and are over-represented in the young to middle age groups 25 - 44 years. Many Sports People are residents of the USA (41%) and Canada (17%). English was the first language of the majority (72%). Almost half (48%) of the Sports People are professionals. They are also over-represented in service (14%) and production (14%) occupations. Surprisingly, considering their occupations, most (45%) are on average incomes. A relatively large proportion (29%) completed their education when they were older than 26 years. Most are single (83%) and have no dependants (97%). They have the least previous world travel of all lifestyle types, twenty-one percent had not travelled before this trip.

Holiday characteristics

Sports People were the least likely lifestyle type to have made any arrangements before arriving in New Zealand with only fourteen percent having made any arrangements. Almost half (48%) of the Sports People travelled alone and Sports People were unusual in that many travelled in pairs (17%) and with a group of friends (10%).

Sports People were the least likely lifestyle to be travelling in couples (only 24%). Sixty-six percent of Sports People cited friends and relatives as their best source of information. Of all lifestyle types, Sports People were the most self-sufficient bringing the greatest range of equipment with them; backpack (83%), walking boots (55%), tent (69%) and bicycles (20%).

The Sports People holidayed in New Zealand for longer than the other lifestyle types, with a mean length of stay of seven weeks. The Sports People used the greatest variety of transport forms and accommodation forms and participated in a wider variety of activities than other lifestyles. The transports of the Sports People were over-represented by the use of bus (83%), hitch-hiking (69%), walking (48%) and bicycle (37%). Twenty-one percent used bicycle as their major transport. Three of the four car buyers were Sports People.

Their accommodation could be classified as inexpensive and outdoors. They were substantially over-represented in their use of tent in (65%) and outside (44%) camp grounds, and cabin not in camp ground (45%). They also used cabins in camp grounds (48%), Backpackers Hostels (45%) and stayed with friends and relatives (62%). Of all lifestyle groups, Sports People were the most likely to have slept at an airport (21%).

They were the most likely to have done the following activities : visited a national park (100%), tramped (93%), visited a museum (90%), stayed overnight in a national park (76%), visited an art gallery (55%), fished (45%), gone on a guided nature tour (28%), canoed (21%), sailed (21%), rock climbed (14%) and mountaineered (10%). Fifty-nine percent of the Sports People cited tramping as their most enjoyable activity in New Zealand.

The Sports People were unlikely to eat at restaurants (only 7%), preferring to cook their own food (79%) or eating take-aways (14%). They were the least likely cluster to buy a travel pass (3%) with cost and lack of interest being the principle reasons for not buying them. The Sports People were the most likely lifestyle to use a travel guide with 28 percent using the Lonely Planet guide and 34 percent using some other guide. Considering many Sports People travelled alone, they were the least likely lifestyle to spend time by themselves. The majority (69%) spent their time with other travellers both New Zealanders and visitors.

The Sports People's holidays cost the least per day, with a mean daily expenditure of \$46, with 73 percent of them being in the 'up to \$50' category. This group was unusual in that for a large proportion (36%), their largest expenditure was on food. While the Sports People had the lowest daily expenditure, they did not have the lowest extravagant expenditure of the lifestyle types. Their most extravagant expenditure was probably on an activity (41%) and cost, on average, \$133.

The Sports People were on long holidays covering many countries. The holiday averaged 204 days (more than six months) and included an average of six other countries.

Holiday satisfaction

For the Sports People, New Zealand is relaxing, has a different culture and it is easy to do things spontaneously. Sometimes, New Zealand has bad weather which spoilt some of the Sports People's holidays. Their primary objective was to participate in outdoor activities and they rated New Zealand on having a wide range and many new activities to choose from. Most accommodations were above the standard and price that Sports People were interested in. They mixed with both New Zealanders and other visitors and agreed that the locals are friendly.

6.3 Budgeters, 29 percent of the FIT sample

Lifestyle profile

Those characteristics involved with money dominate the preferences of the Budgeters. Compared with the other lifestyles, they have a low travel predisposition supported by a lack of interest in travel characteristics. Good service and good facilities are not important to them.

The Budgeters scored highest on AIO characteristics of undecided traveller, economic traveller and holiday preference of inexpensive. They scored lowest on AIOs of self confidence, travel predisposition, camping impact, relaxing travel, jet-setter or vagabond, historic traveller and holiday preferences of relaxing, good service, good weather, uncrowded, and beauty.

Demographics

The Budgeters are the younger FITs; their mean age being 29 years and they are over-represented in the 15 - 34 year categories. The Budgeters tend to be from Australia (21%), Sweden (15%) and Switzerland (10%). Of all the Swedish FITs, two thirds were classified as Budgeters. The strong European proportion is reflected in that for many Budgeters (45%) English is not their first language. A higher than normal proportion of Budgeters are students (19%) and clerical workers (10%). The majority (66%) are on below average or average incomes compared with their country of residence. A large proportion (55%) of Budgeters finished their education aged 21 - 25 years. Considering they are a young group, they have a high level of education. They are mostly single (77%) with no dependants (94%). Most (78%) said that holiday was their main reason for previous travel.

Holiday characteristics

Only 22 percent of the Budgeters had made any arrangements before arriving in New Zealand. The Budgeters were most likely to be travelling in couples (47%). Most (73%) brought a backpack with them.

The mean length of stay in New Zealand for Budgeters was 41 days. While Budgeters used a variety of transport forms, they were different from the other clusters in that more than half (51%) of them hitch-hiked and many walked (38%). They stayed at many types of inexpensive accommodations; using cabins in camp ground (34%), tents in camp ground (29%), cabins not in camp ground (27%), tents not in camp ground (26%), and Backpackers Hostels (45%). Budgeters were the most likely cluster to use YHA hostels (42%) and to stay with friends and relatives (65%). They participated in a variety of activities. Most stayed overnight in a national park (64%) and went tramping (96%). They were the most likely lifestyle type to have gone on a cable car (27%). The Budgeters cooked their own food (87%) rather than eating out. Many (26%) of the Budgeters reported the the Lonely Planet travel guide was their best guide book. Although some (12%) of Budgeters used travel passes, many (28%) did not use them because they were too expensive. The majority (64%) of Budgeters spent most of their time with other travellers.

Their average daily cost was the second lowest of all clusters with a mean daily cost of \$58, with nearly all (88%) of them spending less than \$100 daily. Their most extravagant expenditure cost less than all the other groups, the mean being \$109.

They were likely to stop in an average of four other countries on this holiday. Generally, Budgeters were travelling for a long time, the average being 146 days (approximately five months).

Holiday satisfaction

Of all clusters, Budgeters rated New Zealand lowest on relaxing and beautiful. Service was well above their required level. The Budgeters who were extremely conscious of cost, found New Zealand prices expensive.

6.4 Gregarious, 23 percent of the FIT sample

Lifestyle profile

Contact with people is of major importance to the Gregarious. Money and comfort are not important for this group. They scored higher than all the other lifestyle types on vacation travel interest, opinion leadership, up-on-Jones travel, jet-setter or vagabond, sports spectator, functional gregariousness, vacation gregariousness and holiday preferences of busy, friendly locals, and uncrowded. They did not score lowest on any characteristic.

Demographics

The Gregarious are from no particular age-group; their mean age is 37. Many are from the USA (40%), Germany (21%) and some of the smaller countries. Three of the four Japanese and two of the three Dutch were Gregarious. For many of the Gregarious (39%) English is not their first language. Professional (47%) and sales (18%) occupations are common for Gregarious. A large proportion (56%) of the Gregarious are on above average incomes. The Gregarious are quite different from the other clusters in that many have already travelled extensively to Asia (53%), South America (32%) and the Middle

East (23%). Thirteen percent said that most of their previous travel was for full-time work.

Holiday characteristics

Thirty-seven percent of the Gregarious arranged some of their trip before arrival in New Zealand. Most of the Gregarious travelled alone (42%) or in couples (40%). They were over-represented in impersonal sources of information of travel agents (16%) and articles and documentaries (31%). The Gregarious brought a variety of equipment with them, including backpacks (59%), tents (42%), walking boots (40%) and bicycles (10%).

The Gregarious were not extreme in most holiday characteristics, frequently being the middle of the five lifestyle types. The mean length of holiday in New Zealand was 32 days. For transportation, the Gregarious were over-represented in their use of air (50%), ferry (73%), taxi (48%) and bicycle (23%). Accommodations were a combination of hotel/motel (66%), tent - both in (31%) and outside (26%) camp grounds, YHA hostels (32%) and Backpackers hostels (29%). They participated in a wide range of activities, including staying overnight in a national park (60%). Two thirds of the Gregarious said they were not interested in any form of travel pass. The majority (64%) of the Gregarious used a travel guide.

The Gregarious were the middle spenders, their holiday in New Zealand costing an average of \$82 per day. Transport was frequently their greatest expenditure. Their lack of concern about money is shown by their most extravagant expenditure which was relatively high, costing an average of \$158.

Their length of holiday was average (94 days) and they were likely to visit, on average, four other countries.

Holiday satisfaction

The Gregarious rated 'friendly locals' higher than the other lifestyles. Their holiday was uncrowded and relaxing and they enjoyed the beauty of New Zealand. Like the Sports People, some Gregarious were disappointed with the bad weather during their stay in New Zealand.

6.5 Family Oriented, 26 percent of the FIT sample

Lifestyle profile

Travelling, family and comfort are the priorities of the Family Oriented. They are not particularly interested in camping, active sports participation or bothered by cost.

The Family Oriented scored highest on the AIOs of self confidence, historic traveller, tour traveller, family traveller, and holiday preferences of good service, good weather and cleanliness. They scored lowest on the AIOs of; money oriented, camper traveller and sports participation.

Demographics

The Family Oriented are an older group with a mean age of 41. They are over-represented in the over 45 year categories. They come from a cross-section of country of residences, being slightly over-represented by British (16%) and Canadians (13%). English is most likely (77%) to be their first language. A disproportionate number of the Family Oriented are in administrative occupations (16%) or retired (16%). The Family Oriented are likely to be in the average (46%) or above average (39%) income groups. They tend to be married (59%) and a relatively high proportion have dependants (20%). They are a well travelled group, many had visited Asia (46%) and the Middle East (23%) previously.

Holiday characteristics

The majority (55%) of Family Oriented FITs had made some travel arrangements before they had arrived in New Zealand. Although the largest single category for travel group was couples (42%), there was a disproportionate number of pairs (20%) and family groups (13%). A relatively large proportion (16%) of the Family Oriented obtained their best information before arrival in New Zealand from travel agents.

Family Oriented FITs had a relatively short stay, the mean being 22 days. They used only a few different types of transport and accommodation and participated in a small number of activities. They were over-represented in their use of rental cars (40%), rental campervans (29%) and taxis (47%). They frequently used hotel/motel type accommodation (77%) and they were the most likely cluster to use a campervan in a camp

ground (26%). They were the most likely lifestyle to visit a Church (66%) and to the Waitomo caves (34%). Some ate at restaurants (23%). Over half (60%) of the Family Oriented used a travel guide. Seventeen percent of the Family Oriented FITs used a travel pass. Even though the average expenditure per day was \$94 per day, a large proportion (19%) spent more than \$150 per day. Transport was the greatest cost for most (63%) of the Family Oriented. Their most extravagant expenditure was frequently a meal or special food and cost, on average, \$132. The Family Oriented frequently spent their time either by themselves or with non-travelling New Zealanders.

The Family Oriented were likely to be away from home for an average of almost three months (89 days) and visited about four other countries.

Holiday satisfactions

A numerical value of satisfaction was calculated by multiplying each holiday preference satisfaction by its holiday preference importance and then totalling them all. The Family Oriented had the highest satisfaction rating. This indicates either that they are easily pleased travellers or that New Zealand fulfills their holidays needs.

6.6 Comfort Seekers, ten percent of the sample

Lifestyle profile

Of all the lifestyle types, the Comfort Seekers tend to desire security more than novelty. They scored relatively high on security characteristics (plan ahead, comfort, good service, English spoken) and low on novelty characteristics (spontaneous, exciting, unusual).

The Comfort Seekers scored high on the AIO statements of plan ahead traveller, impersonal sources, relaxing traveller, weekend traveller, cosmopolitan traveller, and on the holiday preferences of relaxing, comfortable, good service, English spoken, beauty. They scored low on AIOs of opinion leadership, information seeker, tenter traveller, up-on-Jones, educational travel, economic traveller, functional gregariousness, vacation gregariousness, and holiday preferences of inexpensive, spontaneous, exciting, unusual, different culture, new activities.

Demographics

The Comfort Seekers are the oldest group; with a mean age of 47, they were over-represented in all categories over 45 years. Many Comfort Seekers are British (28%), Australian (21%) and Canadian (14%) residents. English was the first language spoken by 89 percent of the Comfort Seekers. A large proportion of Comfort Seekers are in agricultural and homemaker occupations and have above average incomes. The majority (64%) finished their full time education before they were twenty. Most are married (75%) and have no dependants (93%). Many had children whom they were no longer supporting. Their previous travel pattern is unusual in that a relatively large proportion had travelled on business (14%), or had not travelled overseas before (18%) with 46 percent citing holiday as their main reason for previous travels.

Holiday characteristics

The Comfort Seekers were the most likely (61%) to have made prior travel arrangements before arrival in New Zealand. The majority (61%) of Comfort Seekers travelled as couples and eleven percent were travelling in a group of friends. They were over-represented in obtaining information from articles, documentaries and travel guides (39%) or on previous visits to New Zealand (14%).

The Comfort Seekers stayed in New Zealand for a relatively short time, the mean length of visit being three weeks. Their average length of stay is similar to that of the average Tourist (see Section 4.2.1). Of all the lifestyle types, the Comfort Seekers used the least variety of transport, accommodation and activities. For transport they were the most likely lifestyle to use rental cars (61%), taxis (57%) and air (50%). Accommodations were predominantly motel/hotel type (89%). While not participating in many activities, they were the most likely to go on a boat cruise (61%) and a ski-plane ride (11%). Of all lifestyle types, the Comfort Seekers were the most likely to eat at restaurants (39%). The majority (57%) of Comfort Seekers did not use a travel guide. The remainder (43%) used a guide, but not the Lonely Planet guide. The Comfort Seekers were the most likely (18%) of all lifestyle types to use some sort of travel pass. Lack of interest rather than cost was not the reason for not using travel passes. The majority (72%) spent their time by themselves rather than with any particular group.

The Comfort Seekers holiday cost more per day than all other lifestyles, the mean being \$103. A large proportion (48%) of Comfort Seekers spent most money on accommodation. Similarly, their most extravagant expenditure cost more than the other clusters, the mean being \$278. The largest single type of extravagant expenditure was souvenirs (32%).

They also had the shortest total holiday, the average being only 39 days (approximately 5.5 weeks). The Comfort Seekers were not likely to be making many stops apart from New Zealand. On average, they only visited one other country. New Zealand was a prime destination for them.

Holiday satisfaction

Their central interest of a clean and comfortable holiday destination was satisfied. They enjoyed the beauty of New Zealand. They rated the weather higher and the holiday as being busier than the other lifestyles. Of all lifestyles the Comfort Seekers rated New Zealand lowest on 'friendly locals' and 'relaxing'.

6.7 Discussion

Many demographic and holiday characteristics were associated with lifestyle. In addition, lifestyle segments chose holidays components which were consistent with their central life interest. FITs took holidays which were related to their lifestyle type. The Sports People participated in more activities than the other lifestyles. The Budgeters did not mind what they did so long as it was inexpensive. The Gregarious spent considerable time with locals, rating their holiday satisfaction of 'friendly locals' higher than the other lifestyles, The Family Oriented had private holidays enjoying the company of their own family. The Comfort Seekers chose a comfortable and relaxing holiday. The choice of holiday is predictable once the lifestyle type has been identified. Lifestyle information is useful for more than pure-headcounting, it provides information as to why an individual chooses a holiday component.

While the results of the lifestyle segmentation tend to support observed visitor behaviour, the study also produced some unexpected results. Firstly, some demographic

and holiday characteristics did not appear to be associated with any particular lifestyle segment. For example, gender was not statistically associated with any lifestyle type. Secondly, there were some unexpected associations between lifestyle and holiday characteristics which cannot be readily explained. In particular, the inexpensive accommodations of YHA hostels and Backpackers appeal to different lifestyle segments. Budgeters tend to stay at YHA hostels while the Sports People more frequently used Backpackers hostels. Further investigation of these anomalies may be interesting.

Those FITs who were on longer less pre-arranged holidays rated their holiday as more relaxing than those who were in New Zealand for a short time and had pre-arranged some holiday. Iso-Ahola's (1981) theory of freedom of choice would support the results that those travellers who pre-arranged less and therefore had less external pressure to participate would have greater feelings of leisure.

An immediate application from lifestyle research is to use the information to optimise promotional projects. For example, a ski-plane company has a limited number of leaflets advertising a new ride. To reach the most likely customers, leaflets could be distributed in motels where the Comfort Seekers (the lifestyle who are most likely to go on a ski-plane) will probably stay.

Chapter 7

Reasons for travelling independently

The model used for this study included lifestyle profiles to identify the central life interest and motivations of FITs. Since this study concentrates on independent holiday travel, it is also important to find out why FITs chose to travel independently.

FITs gave many reasons for travelling independently. Each individual gave several reasons, some economic, and some social. Reasons were grouped into :

- cost,
- dislike of package tours,
- dislike of groups,
- dislike of strict schedule,
- strong willed personality - will not be told how to take a holiday,
- relaxation,
- freedom and flexibility,
- enjoyed travelling independently on previous trips,
- to meet New Zealanders,
- to fit in with local events or people and
- for a real experience, not superficial.

The most frequent reason given for travelling independently was cost. Over twenty percent of FITs reported the holiday they were taking was less costly than a pre-arranged trip of the same duration. Savings by travelling independently were made because :

- * FITs only paid for what they used. On a package tour travellers have to pay for accommodation, meals, activities and transport whether they want them or not.
- * Independent travellers have control of their spending. If exciting activities have highest priority, a FIT can choose to go on a helicopter and jet boat ride while saving money by staying in a tent in a motor camp.
- * Savings may be made on international airfares by travelling stand by. For example, Stand-Buys Ltd and the Last Minute Club are American travel

organisations which offer unfilled tickets on airlines and other travel products at short notice. (Stand-Buys Ltd. 1988).

- * A minor but specific group were airline personnel (three percent of FITs were travelling on airline staff discounts). Airline employees are required to travel standby for staff discounts.
- * Independent travellers can do similar things as a commercially arranged package at a lower cost. A farm stay is relatively easy to organise by a hitch-hiker meeting a friendly farmer who ends up inviting the traveller home.
- * Independent travel avoids the middle men. Agents sometimes add mark-ups or agents fees. A traveller who pre-booked his holiday was told he was getting a five percent reduction for booking ahead. In fact he actually paid more than the normal cost for accommodation. For three nights accommodation, the charge was \$383 more than the normal full price. (Middle men fleece..., 1989)

Several FITs also reported that they had more fun on an inexpensive holiday. Buryn (1983, p7) believes that, *'The less money you spend, the more you will know the people and places you visit and the more you will know yourself'*.

Many FITs mentioned a dislike of package tours ranging from a mild dislike to a strong hatred. The arguments fell into several categories:

- * mass processing of an individual in a travel factory, 'package tours are a lower way of living',
- * a feeling of not being on holiday if the itinerary is structured and
- * speed of tours. Tours try to do too much in a short time period.

Some FITs did not like package tours because they did not want to holiday with strangers that they might not like. One FIT said, 'God forbid, loud radio and smoky buses, we came for a holiday not a Jamboree'. Package tours were associated with strict schedules and wasting time. One FIT reported, 'you have to be up at six am to get away at nine am' and another said, 'don't like being told when to go to the toilet'.

Some FITs knew exactly what they wanted to do and although they had not pre-booked a holiday, they intended to keep to an itinerary. Many of the FITs who wanted to go fishing and tramping said their holiday had to be flexible so they could do their activity at a particular destination in good weather. Other FITs had the opposite view. They had little idea of what they wanted to see and do in New Zealand. They may have looked at

brochures about New Zealand but did not want to commit themselves to a package tour that they may later regret. Some FITs admitted to being strong willed independent people. Independent travel is their style of travel. They are egocentric, wanting to see those things, 'interesting to myself'.

Of those travellers who were approached in the FIT study and were not FITs, some said that their travel agents had advised that it was essential to make bookings in summer for accommodation in New Zealand. Those that accept the information from travel agents are likely to pre-arrange their holiday.

Some FITs knew New Zealand well from talking with people who had travelled and from the media. Several European FITs said their first interest in New Zealand had happened when the 'Rainbow Warrior' was sunk in Auckland. They wanted to find the real New Zealand, not the tourist highlights. One FIT said he wanted to find the 'lifestyle, wishes and problems of New Zealanders'. In particular some said they did not like tourist sites, they wanted to meet 'real' New Zealanders, find unspoilt places and live like locals. They desire the authentic and do not mind having to take time and effort to find it.

Many FITs had travelled independently on previous holidays. They had enjoyed it and plan to continue taking independent holidays. They said it was more fun, more interesting and exciting. Some people enjoyed the element of the unknown, and felt they never knew what was going to happen. Their itinerary changed frequently as they ended up diversifying. They tried to make the most of opportunities that arose. Some felt they got their best ideas from other travellers who had recently been in the area they were heading to. Others always asked locals what were the best things to do in an area. They felt they were on an adventure, full of surprises and spontaneity. For some FITs, it was a spur of the moment decision to holiday in New Zealand. Practically, it was too late to book any accommodations or transport.

While cost is a logical reason for travelling independently, FITs also had many other reasons. FITs want a holiday in which they can be involved, sharing experiences in a new place, rather than passively observing the famous sights through bus windows. They don't mind trading convenience and comfort for autonomy and the freedom to choose the authentic destination rather the artificial tourist resort.

Chapter 8

Conclusion

8.1 Introduction

Currently, tourism is a large foreign exchange earner for New Zealand. As a commercial venture, planned, controlled and co-ordinated tourism can be used to assist economic development. The Town and Country Planning Directorate (1984) approach for strategic planning is sequential; the three phases being market research, policy development and implementation. The study undertaken for this thesis focused on the first phase, identifying the market segment of FITs and examining their characteristics.

The policy development phase is a strategy for public sector involvement in tourism, systematically comparing economic, social and environmental impacts of market segments and resource demand combinations. Positioning analysis is undertaken to compare products with maximum return segments. The implementation phase incorporates information obtained into programmes and budgets of tourism organisations encompassing assistance to promote preferred market or resource developments.

Tourism is a special industry because it is not isolated from the community in which it operates. Tourism must seek a planning approach which will be both commercially profitable and also socially acceptable to residents of the country being visited by international tourists.

8.2 Market segmentation

8.2.1 Summary of results

The interview results showed that FITs are a distinct segment of travellers to New Zealand in terms of demographic characteristics and holiday behaviour as well as travel style.

FITs have long holidays in New Zealand, the average being one month. They frequently travel in small groups (couples or pairs) and they spend considerably less per day than the average inbound holiday visitor. Most FITs get their information about New Zealand through personal sources (friends and relatives) and from factual information (articles, documentaries and travel guides) rather than from travel agents. Many FITs bring some equipment with them, including backpacks, walking boots and tents. Their transport forms, accommodation forms and activities are more and varied compared with the average inbound holiday visitor. Popular transport modes of FITs are rental car, hitch-hiking, rental campervan, bus, private car and bicycle. They choose accommodations which are inexpensive and have cooking facilities including hotel/motel, friends and relatives, hostels, cabins, tents and campervans. FITs are highly active visitors. The majority visit and stay overnight in national parks, go tramping, visit museums and churches, go on a boat cruise. Many visit art galleries, ride on a gondola, go fishing, visit Waitomo caves, go on a cable car, cycle, go jet boating, go rafting, take scenic flights, go on guided nature tours, and sail. Some participate in less well known activities, for example black water rafting. The majority of FITs use a travel guide, the Lonely Planet guide by Tony Wheeler being the most popular.

Most FITs also visited other world regions as well as holidaying in New Zealand. The majority visited Australia and many FITs also travelled in Asia, South Pacific islands and North America. Their total holiday averages approximately four months.

Compared with the average holiday visitor to New Zealand, FITs are more likely to be young, male, a resident of North America and Europe, employed in professional, student, production, agricultural or service occupations and unlikely to have visited New Zealand before. The majority of FITs are single and have no dependants.

FITs have similar lifestyle profiles. They are highly motivated travellers, looking for novelty in their holidays, enjoying a challenge, and liking value for money. They are impulsive, gregarious and inquisitive. They search for the authentic and unique opportunities. FITs choose to travel independently in New Zealand for both social and economic reasons. Since they buy selectively they can choose those holiday components which best meet their personal needs. They value freedom of choice. They dislike package tours because of the restrictions on time, travel group and activity. They are

intrinsically motivated people. They choose a highly interactive holiday because they want to find the real New Zealand and meet New Zealanders.

FITs were further segmented on the basis of lifestyle. Sports People, Budgeters, Gregarious, Family Oriented and Comfort Oriented were associated with particular demographic, holiday characteristics and holiday satisfactions. FITs took holidays which were related to their lifestyle type. The Sports People, who enjoyed activities, participated in more activities than the other lifestyles. The Budgeters did not mind what they did so long as it was inexpensive. The Gregarious spent considerable time with locals, rating their holiday satisfaction of 'friendly locals' higher than the other lifestyles. The Family Oriented had private holidays enjoying the company of their own family. The Comfort Seekers chose a comfortable and relaxing holiday. Hence, the choice of holiday is predictable once the lifestyle type has been identified.

8.2.2 Discussion of FITs in New Zealand

This study only investigated the independent traveller to New Zealand. As a holiday destination, New Zealand has been described as a relatively safe and easy country in which to travel. For those who choose to travel without the security of a travel company, they are not likely to be at any great risk. Of the quality of life scores calculated by International Living, New Zealand scored high on political stability, civil freedom, recreation opportunities, environment and health and safety (Lundberg 1985).

FITs expressed concern over what New Zealanders are letting happen to New Zealand. Visitors, especially Europeans, come to New Zealand to enjoy the pristine environment that they no longer have at home. During their holiday, some FITs were shocked by such things as the use of leaded petrol. For a nation of only three million people, several FITs mentioned there is an excessive amount of litter.

Many FITs came to New Zealand because of the recreation available in national parks. Overnight tramps with unique scenery, huts provided, and advice from park staff are important incentives for overseas visitors. New Zealand offers an array of holiday opportunities: including the option of purchasing holiday components which satisfy individual interests.

While independent travellers were thought to be a small fringe element, this study shows that they contribute to approximately one third of summer holiday visitors. While some studies have shown the percentage of inbound travellers to be increasing, the future is uncertain. The numbers of FITs arriving in New Zealand may continue to increase. The world's most prolific travellers, the Germans, are leading the fashion and trends in travel style. If other nations follow, the number of FITs may increase.

Currently, consumers are increasingly dissatisfied with mass packaging, particularly in the fashionable and image-oriented sector of tourism. While there is a trend towards FIT travel, the future is uncertain. Hodgson (1987) states that for tour operators to remain profitable, they must change from their non-discriminating marketing approach to a lifestyle identity. Consumers will buy a pre-arranged product if it co-incides with their personal identity. Hodgson believes that it is up to the tour operators to construct suitable holidays aimed at lifestyle groups before people will revert to buying prior to arrival. While tour operators lose out on the independent traveller, publishing companies thrive. Travel guides in many languages and for almost any country in the world are available from many publishers including Berlitz, Lonely Planet, Fodor's, Fromer's, Insight and Let's Go.

There is a recent trend towards more frequent but shorter holidays. If this trend dominates in the future, New Zealand may lose the long haul FITs who are taking long holidays. Coates (1985) believes that the special interest group (those who travel in large numbers and pre-book) who require special amenities is a growth market.

8.3 Planning

While not the objective of this research, a further study could examine the impact of various travel styles. Mass tourism can greatly affect local populations. A classic travel log by Fermor (1983) discussed the spoiling of the Greek coast in 1966 because the area was changed to cater for the tourists. In New Zealand, locals and FITs avoid the more commercial areas of Rotorua and Queenstown. Currently in New Zealand there is concern over the impact of Japanese package tourists, who need interpreters, special food

and special accommodation. Their affluence, the cultural differences and the language barrier can make them unwelcome guests.

In contrast FITs have different types of impacts. Marsh and Henshall (1984) believe that the interactive visitors (FITs) have positive social impacts in New Zealand. They visit different places, use different transports and accommodations and want different things. They keep low profiles, travelling in small groups. In some ways, FITs suit the New Zealand lifestyle. FITs enjoy meeting New Zealanders; they like small scale operations rather than multi-national resorts; they provide moderate financial returns and they prefer the authentic rather than artificial attractions.

For a socially interactive type of visitors the attitudes of residents must be sympathetic. A study by Marsh and Henshall (1984) showed that both residents and tourism entrepreneurs in New Zealand prefer high social interaction tourism.

The disadvantages of FITs may be that they do not directly contribute to large multi-national tourism companies. Instead they often use small businesses which are local to an area. FITs are anonymous and are not possible to identify by clothing or labels. In many ways FITs holiday as do domestic travellers.

Smith (1977) believes that interpersonal conflicts between hosts and guests is minimal when their respective standards of living are similar. Hosts and guests from countries with similar standards of living have the economic capacity and social incentives to travel, to become guests in some other land (Smith 1977). Currently FITs are predominantly from North America and Europe which have standards of living similar to New Zealand's.

The new challenge for tour operators is to organise their resources into products which interest independent travellers. 'Been-there-seen-that' needs to be allied to new products offering 'shared-this-experience-with...' (Cullwick 1984). Iso-Ahola's (1981) advice for those constructing package trips is that programs should be run on flexible schedules with few constraints. The traveller should not be given the impression of time constraints. Thus the intrinsic benefits will be lost to extrinsic pressures.

8.4 Implementation

In the past, New Zealand's international tourism policy has been to increase the numbers of tourists arriving, leaving it up to tour operators and travel agents to sell a travel style. Considering that independent travel is not formally promoted, the numbers who travel independently are large.

Countries vary in their policy and attitudes towards FITs. New Zealand has a free market approach. Currently some organisations are doing extremely well; for example Backpackers hostels and the Magic Bus have a large market share considering they are young organisations. While information centres have increasing numbers of FITs making use of their services, they do not set out to encourage an independent travel style.

In contrast, other countries have different agencies and regulations which strongly affect independent travel. The USSR forbids independent travel. An itinerary must be planned and booked before an intending traveller can get a visa to enter the USSR. The opposite occurs in some other countries where FITs are encouraged. In Denmark, where an independent travel style is encouraged, Use-It is a city sponsored information centre for young travellers situated near the centre of Copenhagen. It offers services free of charge so that visitors have an easier and more enjoyable stay in Denmark. The office provides :

- luggage storage,
- map and information pamphlets,
- ride boards (drivers offer specific lifts to hitch-hikers),
- message boards (for travellers to keep in contact with each other) and
- hold mail (Harvard Student Agencies 1987).

Also available is a 'Meet the Danes program' where a visitor can spend an evening with a Danish family with similar interests (Fodor 1982). Other European countries, such as Sweden and Germany also run such programs.

While tourism is of economic value, Wahab (1975) believes that for a sustainable long term industry, hospitality should not be commercialised. The tendency is to take money from tourists whenever possible but commercialising human relations products will cause a drop in image of a destination. If New Zealand did not charge for interactive type programs, the overall benefits would be greater.

Murphy (1985) believes that the rapid expansion of tourism creates problems as well as benefits for host communities. To create a viable long term industry management and monitoring are required in addition to development.

For a country which relies on long haul travellers, as New Zealand does, the country must appeal to the allocentric personalities. If New Zealand continues to develop resorts and facilities for mass tourism, the numbers arriving may fall. New Zealand will only ever appeal to mass tourism from short haul travellers, the Australians. Only the allocentrics will consider travelling so far for a holiday and they are not interested in large tourist resorts.

In summary, the future is uncertain. It is likely that there will be continual change. Smith (in Hodgson 1987) sees the present demand for tourism products to be based on lifestyles, tastes, philosophies and social conditions as well as the economic constraints of interest rates and currency fluctuations. The tourism industry needs to be able to adapt quickly to changes.

A possible target market is FITs. They like small scale operations and prefer the authentic to the tourist facade. Without any great investment New Zealand can benefit both economically and socially. Tourism organisations can best utilise resources by taking a consumer oriented marketing approach, providing products and services which satisfy the wants and needs of target markets. Rather than another boom and bust industry, strategic planning is needed to ensure that tourism will fulfill its economic and social potential.

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Appendix A. FIT interview schedule

Section A Holiday behaviour

- 1.*⁶ On what date are you leaving New Zealand?
2. What is your departure flight number?
3. What airport are you departing from?
(a) Auckland (b) Christchurch
4. Where is the next country you will stay for at least one night?
5. At which airport did you arrive?
(a) Auckland (b) Wellington (c) Christchurch (d) By sea
- 6.* On what date did you arrive in New Zealand for this trip?
7. In which country did you last stay for at least one night?
- 8.* Which people, if any, planned and booked this trip with you and then travelled with you? [Include yourself but exclude anyone you met once the trip started.]
(a) alone (d) a family group
(b) a couple (e) a group of friends
(c) a pair (friend or relative) (f) other (please specify)
9. What is the purpose of your holiday in New Zealand?
(a) general sight-seeing
(b) part of world tour
(c) visit friends and relatives combined with a holiday
(d) special event, eg honeymoon (please specify)
(e) sporting/activity holiday
(f) other (please specify)
10. During your holiday in New Zealand, where did you spend most of your time?
(a) North Island (b) South Island (c) equal in each Island
11. What forms of transport did you use in New Zealand?
(a) rental car (f) private van (k) ferry
(b) rental campervan (g) taxi (l) bicycle
(c) rental van (h) bus (m) hitch-hiking
(d) private car (i) air (n) walking
(e) private campervan (j) train (o) other (please specify)
12. Now rank them in order of number of days used?

6/ information also obtained in Study B

13. What types of accommodation did you use?

(a) hotel/motel/boarding house/private hotel

camping

- in camp ground

(b) in cabin/hut/fixed caravan

(c) in tent

(d) in campervan/own caravan

-not in camp ground

(e) in cabin/hut

(f) in tent

(g) in campervan/own caravan

hostel

(h) YHA

(i) backpackers

(j) other eg YMCA, University

(k) other hostel

rental

(l) home stay, farm stay etc

(m) apartment, time share, flat etc

private

(n) at private residence of friends or relatives

other

(o) boat

(p) in transit

(q) other (please specify)

14. Now rank them in the order of number of nights in each type.

15. Where did you generally purchase your food for your main meal during your holiday?

(a) prepared by selves with food purchased from shops

(b) from fast-food outlets (eg. fish and chips, McDonalds)

(c) from restaurants

16. Which of the following did you do in New Zealand?

(a) visit museum

(b) visit church

(c) visit art gallery

(d) visit national park

(e) stay in national park

(f) horse-riding

(g) chairlift

(h) gondola

(i) guided nature tours

(j) rock-climbing

(k) mountaineering

(l) scuba diving

(m) water skiing

(n) fishing

(o) skiing

(p) tramping/ hiking

(q) cycling

(r) caving

aerial sight-seeing

(s) plane

(t) ski-plane

(u) helicopter

(v) hot air balloon

(w) hang gliding

boating

(x) canoe

(y) rafting

(z) sailing boat

(*) jet boat

(!) motor boat, not jet boat

other

(b1) other (please specify)

(b2) cable car in Wellington

(b3) Waitomo caves

(b4) golf

17. Which of the activities did you do for the first time?
18. Which of the activities did you enjoy the most?
19. Who did your group spend most time with?
(a) selves (d) other foreigners who were also travelling
(b) New Zealander's who were not travelling (e) New Zealanders who were travelling
(c) no group in particular (f) other travellers, foreigners and New Zealanders
20. Did you use any passes during your visit?
yes (a) Air pass
(b) Coach pass
(c) Sight-seeing pass
(d) other (please specify)
no (e) none because didn't know about them.
(f) none, I knew about them but chose not to use any passes because they are too expensive.
(g) none, I knew about them but weren't interested in them.
- 21.* What was the cost of your holiday in New Zealand only, excluding international air fares. Total of all money spent in New Zealand and any prepaid for the New Zealand visit. either :
in total _____ or per day _____ Currency _____ (NZ if possible)
22. When did you spend most of this money?
(a) before arrival in New Zealand (d) in New Zealand, about the same each day
(b) immediately after arrival in New Zealand (e) at the end of the visit
(c) in New Zealand, in bursts
23. What part, if any, of your holiday was pre-paid/pre-arranged and confirmed before your arrival in New Zealand?
(a) none (d) travel passes
(b) rental vehicle hire (e) special activity. eg Guided Milford Walk
(c) accommodation to connect with international flights (f) other (please specify)
24. What did you spend most money on?
(a) transport (c) food (e) souvenirs
(b) accommodation (d) activities (f) other (please specify)
25. What was your most extravagant single expenditure? Cost _____
26. What was the highlight of your visit in New Zealand?
27. Why?
28. Before you arrived in New Zealand, where did you get the most useful information about New Zealand?
at home (a) from friends and relatives
(b) from New Zealanders visiting my home country
(c) advertising
(d) articles, documentaries and travel guides
(e) travel agents
during previous travels (f) from other travellers who had recently visited New Zealand
(g) from New Zealanders who were also travelling
(h) personal experience on previous visit to New Zealand.

29. What travel guide did you find the most useful?
paid for
(a) A Travel Survival Kit, published by Lonely Planet
(b) Lost and Found in New Zealand
(c) New Zealand Handbook, by Jane King
(d) Tramping in New Zealand, published by Lonely Planet
(e) Fromer's New Zealand on \$25 a day, by Susan Poole
(f) Fodor's, Australia New Zealand and the South Pacific
(g) Mobil New Zealand Travel Guide
(h) Getting Around New Zealand, by Sean Millar
(i) other (please specify)
free
(j) AA Accommodation Guide
(k) other (please specify)
(l) none
30. Where did you get the travel guide?
(a) obtained in my home country (c) obtained in New Zealand
(b) obtained on travels (d) no travel guide used
31. What items did you bring with you for your holiday?
(a) camera (e) walking boots (i) scuba gear
(b) travellers cheques (f) tent (j) fishing gear
(c) credit card/s (g) bicycle (k) other (please specify)
32. Did you have trouble obtaining information or booking holiday arrangements, before you arrived in New Zealand?
(a) no (d) information was out of date
Yes What was the trouble? (e) bookings couldn't be made from overseas
(b) lack of information (f) other (please specify)
(c) information was unreliable
33. How would you have preferred to organise your visit, now that you have travelled in New Zealand?
(a) no changes
(b) transport and accommodation from home
(c) complete holiday from home
(d) transport and accommodation on arrival in New Zealand
(e) complete holiday in New Zealand
(f) other (please specify)
34. What other countries have you visited for at least one night since you started travelling?
35. What other countries do you intend to visit for at least one night before you stop travelling?
36. How long will you be travelling? (from the time you left home to the time you will return)
37. Why did you choose to travel independently?

Section B Demographics

- 38.* How old are you?
- 39.* Male or female
- 40.* In which country did you last live for 12 months or more?
41. Where is your home country? [only if different from above]

- 42.* What income did you receive in the last year compared to the average of the country in which you were living?
(a) well above (c) about the national average (e) well above
(b) above (d) below
43. Which of these occupation groups are you in?
(a) professional technical and related workers
(b) administrative and managerial workers
(c) clerical and related workers
(d) sales workers
(e) service workers
(f) agricultural animal husbandry, forestry, hunting, fishing workers
(g) production, transport equipment, operators and labourers
(h) retired
(i) homemaker/housewife/househusband
(j) student
(k) unemployed
44. At what age did you finish full time education. Choose current age if still in full time education.
(a) up to 16 years (c) 21 - 25 years (e) 31 years and over
(b) 16 - 20 years (d) 26 - 30 years
45. Are you
(a) single with no dependents (c) married with no dependents
(b) single with dependents (d) married with dependents
46. Where is your home?
(a) a city (b) a country area (c) an isolated area
47. How well do you speak English?
(a) first language (b) fluent (c) OK (d) limited
48. How many times have you been to New Zealand before?
49. What parts of the world have you stayed more than one night? (leave out home country)
(a) Australia (g) Scandinavia
(b) South Pacific Islands (h) Europe, other than GB and Scandinavia
(c) Asia (i) USSR
(d) North America (j) Africa
(e) South America (k) Middle East
(f) Great Britain
50. What was the main reason for your previous travels?
(a) holiday/vacation (d) business (g) stopover
(b) to visit friends/relatives (e) work full-time (h) other (please specify)
(c) working holiday (f) formal education

Section C Lifestyle

Attitudes, Interests and Opinions

Tell me if you agree or disagree with the following statements.

Scoring : strongly disagree 1, disagree 2, no response 3, agree 4, strongly agree 5.

51. I enjoy looking at vacation or travel magazines. (*vacation travel interest*)
52. I like to be considered a leader. (*self-confidence*)
53. My friends often ask my advice about vacation travel. (*opinion leadership*)
54. I would never leave on a vacation without reservations at my destination. (*plan ahead traveller*)

55. I often have difficulty in deciding where to visit on a vacation. (*undecided vacationer*)
56. I often ask the advice of my friends regarding vacation spots to visit. (*information seeker*)
57. I often contact a travel agency for information about vacation travel. (*impersonal sources*)
58. Given a windfall of money, I prefer to spend it on vacation travel than something else. (*money oriented*)
59. I enjoy vacation travelling away from my hometown. (*travel predisposition*)
60. My family enjoys camping. (*camper traveller*)
61. Camping in a tent is the best way for me to get close to nature. (*tenter traveller*)
62. Camping sites are beginning to overcrowd some of the popular vacation areas. (*camping impact*)
63. If I can't completely relax, I don't feel that I've had a vacation. (*relaxing traveller*)
64. I prefer to take several short vacations rather than a few larger ones. (*weekend traveller*)
65. I would not vacation in an area where first class accommodations were not available. (*cosmopolitan traveller*)
66. I spare no expense in making travel arrangements. (*first class traveller*)
67. Having my friends over to see my vacation slides is the best part of my vacation. (*up-on-Jones travel*)
68. Educational vacations are the most fun and the most rewarding. (*educational traveller*)
69. My vacation is normally planned so that I can participate in my favourite sport. (*sports participant*)
70. On vacation, I would not hesitate to hop on a plane and travel to a more fun location. (*jet setter or vagabound*)
71. On vacation, I often eat in the more economical restaurants. (*economic traveller*)
72. Visiting historical locations is an important consideration in planning my vacation. (*historic traveller*)
73. The atmosphere of guided tours is too stifling. (*tour traveller - reverse score*)
74. I normally plan my vacation around watching my favourite sporting event. (*sportsmen spectator*)
75. The most important part of any vacation is meeting new people. (*functional gregariousness*)
76. Families that vacation together are happier. (*family travel*)
77. When I have a choice, I would rather travel to a new place and meet new people. (*vacation gregariousness*)

Holiday Preferences

How important is each of the following to your ideal holiday?

Scoring : strongly dislike 1, dislike 2, indifferent 3, like/prefer 4, strongly like/essential 5.

78. relaxing
79. busy
80. cheap/inexpensive
81. at short notice/spontaneously
82. exciting
83. something unusual
84. different culture from my own
85. comfortable
86. good service
87. pleasant climate/good weather
88. cleanliness
89. friendly local people
90. local people who speak English
91. to try new activities
92. uncrowded
93. picturesque/beautiful scenery

Holiday satisfaction

94. - 109. How would you rate your New Zealand experience on the same characteristics 79 - 93 above?

Scoring : very bad 1, bad 2, average 3, good 4, very good 5.

Appendix B. Travellers approached for FIT study

Date	Airport	FIT interviews	New Zealanders	Not holiday visitors	More than 20% holiday pre-booked	Incomplete interview	Total approached per day
3/2/88	Auckland	9	9	30	16	1	65
4/2/88	Auckland	11	7	19	9	4	50
5/2/88	Auckland	6	15	8	6	1	36
6/2/88	Auckland	13	4	8	0	3	28
8/2/88	Auckland	6	5	2	3	0	16
9/2/88	Auckland	7	3	4	3	0	17
10/2/88	Auckland	4	15	20	13	0	52
11/2/88	Auckland	7	11	10	0	1	29
12/2/88	Auckland	5	15	22	4	0	46
15/2/88	Auckland	4	2	7	0	0	13
16/2/88	Auckland	9	13	14	9	0	45
17/2/88	Auckland	5	2	10	3	0	20
18/2/88	Auckland	7	11	16	21	1	56
19/2/88	Auckland	8	12	11	4	0	35
20/2/88	Auckland	6	21	14	5	0	46
21/2/88	Auckland	8	1	8	6	1	24
22/2/88	Auckland	10	3	6	25	0	44
23/2/88	Auckland	4	10	6	1	0	21
24/2/88	Auckland	9	18	18	33	1	79
25/2/88	Auckland	8	6	0	1	1	16
26/2/88	Auckland	5	3	12	9	0	29
27/2/88	Auckland	9	2	7	21	0	39
28/2/88	Auckland	6	11	11	19	1	48
29/2/88	Auckland	7	5	7	11	0	30
1/3/88	Auckland	4	2	12	4	0	22
2/3/88	Auckland	4	1	1	0	1	8
3/3/88	Auckland	7	2	2	6	0	17
4/3/88	Auckland	7	9	13	6	0	35
5/3/88	Auckland	5	7	21	19	0	52
8/3/88	Christchurch	3	6	1	11	0	21
9/3/88	Christchurch	1	3	4	1	1	10
10/3/88	Christchurch	2	2	1	9	0	14
11/3/88	Christchurch	3	8	11	26	0	48
12/3/88	Christchurch	2	4	0	10	0	16
13/3/88	Christchurch	2	2	2	13	0	19
14/3/88	Christchurch	3	4	1	8	0	16
15/3/88	Christchurch	7	9	1	29	0	46
16/3/88	Christchurch	1	6	0	3	2	12
17/3/88	Christchurch	2	0	0	0	1	3
18/3/88	Christchurch	4	6	0	15	0	25
19/3/88	Christchurch	4	4	1	23	0	32
20/3/88	Christchurch	3	13	5	34	1	56
21/3/88	Christchurch	4	5	3	4	0	16
22/3/88	Christchurch	3	22	8	24	0	57
23/3/88	Christchurch	2	3	1	8	1	15
25/3/88	Christchurch	2	9	3	16	0	30
26/3/88	Christchurch	5	0	0	0	1	6
27/3/88	Christchurch	6	10	2	42	0	60
28/3/88	Christchurch	1	2	0	5	0	8
29/3/88	Christchurch	7	9	3	18	0	37
Total		267	352	366	556	24	1565

Number of inbound holiday visitors including FITs : $267 + 556 = 823$

Percentage FITs of holiday visitors : $267 / 823 = 32.44\%$

Response rate ie co-operated /approached : $(267 + 352 + 366 + 556) / 1565 = 98.71\%$

Appendix C. Countries of international regions

Africa

Egypt, Kenya, Somalia, South Africa, Zimbabwe, Africa unspecified.

Antarctica

Antarctica.

Asia

Bali, Bangladesh, Brunei, Burma, Cambodia, Celebes, China, Hong Kong, India, Indonesia, Japan, Korea, Macau, Malaysia, Nepal, Pakistan, Phillipines, Singapore, Taiwan, Thailand, Asia unspecified, South East Asia unspecified.

Australia

Australia.

Central and South America

Chile, Ecuador, Mexico.

Europe

Austria, Belgium, Czechoslovakia, Denmark, Finland, France, Germany (West), Great Britain, Greece, Netherlands, Iceland, Hungary, Ireland, Italy, Luxembourg, Monaco, Norway, Portugal, Spain, Sweden, Switzerland, Turkey, Yugoslavia, Scandinavia unspecified, Europe unspecified.

North America

Bermuda, Canada, USA.

Middle East

Bahrain, Israel.

Pacific

Cook Islands, Fiji, French Polynesia, New Caledonia, Papua New Guinea, Tahiti, Tonga, Vanuatu.

USSR

USSR.