

The Ministry of
Tourism



Te Manatū Tāpoi

Measurement of Māori in Tourism

Te Ahu Mai – He Tatau Tāpoi Māori

Summary Report

October 2004

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This report establishes the place of Māori in tourism as far as it can be measured using existing data sources.

Key points are that Māori are engaged at a comparable rate to non-Māori and that the rate of growth is faster than for non-Māori.

Overall, an estimated 18,368 Māori full-time equivalent jobs can be attributed to tourism demand, representing 11% of total tourism employment in 2001.

About 20% of international visitors to New Zealand have experienced Māori cultural activities in recent years.

This report forms part of a body of information-related initiatives in place to support development of Māori participation in tourism.

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This research project was undertaken with support and contributions from key stakeholders.

Substantive analysis of the data sources available and extraction of the population census data were undertaken by Statistics New Zealand. The Ministry of Tourism undertook analysis of the tourism demand data available and prepared the final report.

The project was funded by the Cross Departmental Research Pool administered by the Ministry of Research, Science and Technology.

Electronic copies of this summary report, and the full report which contains more detailed analysis and data tables, are available on the website of the Tourism Research Council New Zealand:

www.trcnz.govt.nz

Foreword

In 2001, the New Zealand Tourism Strategy 2010 put in place a long-term vision for tourism in New Zealand. The strategy highlighted the critical importance of developing New Zealand's unique culture and heritage in building a sustainable future for the sector. It also made a number of recommendations about building Māori capacity to enable greater participation of Māori in tourism.

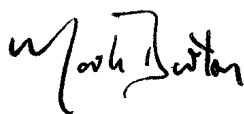
Quality data is essential for informed policy and developmental work, and for monitoring growth. Recognising the current lack of Māori tourism data, the Ministry of Tourism, in collaboration with Statistics New Zealand, examined existing data sources to determine what useful information could be drawn from them.

This report summarises the findings of the research, and for the first time presents a statistical snapshot of Māori involvement in the tourism industry. It establishes the role of Māori in tourism and the progress achieved in the last decade. It profiles the characteristics of Māori who are employed in tourism, and of the international visitors who experienced Māori cultural activities.

We now know that Māori employment comprises 11% of total tourism employment. We also know that about 20% of international visitors to New Zealand experienced Māori cultural activities. This shows that Māori and Māori culture play a significant role in New Zealand's tourism industry.

Māori tourism offers an important point of difference for New Zealand on the world stage. The wairua (spirit) of Māori overlays every part of the tourism experience in New Zealand – from seeing world-renowned Māori art and design, learning kapa haka, or simply enjoying the magnificent landscapes of Aotearoa New Zealand.

Māori participation in the tourism sector is important to our long-term success. And as the Māori tourism sector grows in strength, both the tourism industry and the New Zealand economy will benefit.



Hon Mark Burton
Minister of Tourism



Hon Dover Samuels
Associate Minister of Tourism

October 2004

Key Findings

New Zealand's existing statistical framework provides the ability to undertake analysis around broad areas relating to Māori engagement in tourism. Highlights from this analysis are given below.

Total Employment

- Total Māori employment supported by tourism demand is estimated to be 18,368 full-time equivalent jobs (FTEs) in 2001, comprising 11,094 direct and 7,274 indirect tourism-related FTEs.
- Māori tourism employment represents 11% of total tourism-related employment (direct and indirect, based on the Tourism Satellite Account concept).
- The Māori share within the *Tourism-Characteristic Industries* was slightly higher, at 12%.

Employment in Tourism-Characteristic Industries¹

- Māori have a rapidly increasing engagement in tourism. Māori employment in *Tourism-Characteristic Industries* increased by 72% between 1991 and 2001, compared with 36% for total employment in these industries.
- Māori employment in *Tourism-Characteristic Industries* of 12% is comparable with the 11.4% of New Zealand's total population that comprised Māori aged 15 years and over at the 2001 Census.
- Māori employment in *Tourism-Characteristic Industries* showed a number of distinct characteristics in 2001:
 - Predominance of younger Māori workers – 44% aged under 30 years, compared with 36% for the total within the *Tourism-Characteristic Industries*.
 - A higher proportion of Māori workers employed part-time – 37%, compared with 33% for total tourism industries and 23% for all industries.
 - Māori employed in these tourism industries have lower qualifications – 77% have no qualifications or school-only qualifications, compared with 69% for the total employed in these industries.
 - The Māori tourism workforce comprised 9% employers and 91% employees, compared with 17% employers and 83% employees across the tourism industries. Of the Māori employers, 65% were self-employed without employees.
 - The characteristics above manifest themselves in income levels being lower for Māori, with a median income of \$18,200, or 14% less than the \$21,200 for all workers within the tourism industries.

¹ Tourism-Characteristic Industries include four industry groups: Accommodation; Cafes and Restaurants; Transport and Storage; and Cultural and Recreational Services.

International Visitors' Participation in Māori Cultural Tourism

- The number of international visitors who experienced Māori cultural activities increased by 11% over the five-year period 1998-2003, compared with a 42% increase in visitor arrivals.
- This difference in growth rates resulted in the proportion of visitors who participated in Māori cultural activities declining from 22.9% in 1998 to 17.8% in 2003, as measured by the International Visitor Survey.
- Among the Māori cultural activities experienced by international visitors during 1998-2003, participation in Māori performance activities increased by 10%, while Māori-organised activities decreased by 7% and marae visits declined by 62%. (The apparent large decline in marae visits may be partly due to similar activities increasingly being provided as part of Māori cultural activity packages, and therefore may not be reported separately by tourists in the survey, resulting in under reporting.)
- Of the international visitors who experienced Māori cultural activities in 2002, 83% were on holiday, with 7% visiting friends or relatives, 4% on business, and 6% here for other purposes.
- Holiday visitors had the greatest propensity to experience Māori cultural activities (29%), compared with 13% for the rest of the traveller groups.
- Fully independent travellers (FIT) made up the largest proportion (35%) of tourists to have experienced Māori cultural activities, followed by package travellers (27%), semi-independent travellers (SIT, 21%) and tour groups (17%).
- Although a relatively small market segment, tour groups had the greatest propensity to experience Māori cultural activities (46%), followed by package travellers (40%), SIT (18%) and FIT (13%).
- Of the visitors who experienced Māori cultural activities, over 60% came from the five key markets – Australia, United Kingdom, United States, Japan and South Korea.
- Visitors from Taiwan and South Korea had the greatest propensity to experience Māori cultural activities (42% and 41%, respectively), followed by China (37%), Canada (29%), Germany (28%), Japan (27%), United Kingdom (25%) and the United States (23%).
- Australia was New Zealand's largest inbound market, but visitors from that country had the lowest propensity to experience Māori cultural activities (8.4% in 2002 and 10.6% in 2003).

Domestic Visitors' Participation in Māori Cultural Tourism

- Only a small proportion (0.5%) of New Zealand domestic travellers on overnight trips undertook Māori cultural activities during their travels in 2001. In comparison, 19.6% of international visitors experienced a Māori cultural activity in the same year.

Introduction

This research has been undertaken to assess the ability of existing statistics to provide quality data on Māori tourism and to set out the findings of the statistical investigations.

Background

The project was undertaken in response to the 2001 report *He Matai Tāpoi Māori – a Study of Barriers and Impediments for Māori in Tourism* – commissioned by the Ministry of Tourism and Te Puni Kokiri. The report found that there was a dearth of information to support the development of Māori tourism initiatives, including hard data, marketing research and applied research.

The *New Zealand Tourism Strategy 2010* released in 2001 also made a number of recommendations related to the objective of building Māori capability in tourism, including developing a database of Māori tourism businesses.

Together, these strategic documents provided a strong rationale for investigating how to enhance the provision of information supporting Māori in tourism.

Definitions

With both Māori business and tourism itself being difficult to measure, it is important that this research adopts some practical definition of Māori tourism. This area is difficult given the wide range of definitions that could be used. However, for the purpose of this report the following approaches were employed.

- **Māori in Tourism** – defined as Māori involved in the tourism industry through employment or ownership of businesses that deal with tourism products (supply perspective).
- **Māori Cultural Tourism** – defined as tourism experiences that include visits to Māori cultural activities (demand perspective).

New Zealand Tourism Industry

In the year ended March 2003, tourism directly and indirectly contributed 9.6% of New Zealand's gross domestic product (GDP) and supported 10.3% of total employment (an estimated 172,000 FTEs). International tourism contributed 17.8% of total export earnings, being New Zealand's largest export earner.

Tourism is growing rapidly, with international visitor arrivals forecast to increase by 5.8% a year, from 2.1 million visitors in 2003 to reach 3.1 million in 2010. Expenditure by international visitors is forecast to increase by 8.5% a year, to reach \$11.3 billion in 2010.

For further information on the New Zealand tourism industry, visit the Tourism Research Council New Zealand website: www.trenz.govt.nz

Investigation

New Zealand has an extensive collection of official statistical data, including that covering the tourism sector. However, because statistics for Māori in the tourism sector have not been specifically developed, there are limitations on the statistics available to support decision-making in this area. The aim of this research was to make the most of existing data sources and generate useful statistics to support Māori tourism development. A number of data sources were examined, including:

Census of Population and Dwellings, 1991 and 2001 (Statistics New Zealand)

International Visitor Survey, 1998 to 2003 (Ministry of Tourism)

Domestic Travel Survey, 1999 to 2001 (Ministry of Tourism)

Household Labour Force Survey (Statistics New Zealand)

Business Frame (Statistics New Zealand)

Cultural Experience Survey, 2002 (Statistics New Zealand and Ministry of Cultural Affairs)

It was apparent from the investigation that only the Census of Population and Dwellings (the census) and the International Visitor Survey (IVS) contained relevant and reliable data that could be utilised. The Domestic Travel Survey was assessed as being able to generate only limited information. In other Statistics New Zealand datasets, such as the Business Frame, the ability to identify Māori businesses and build a representative sample to provide useful insights was limited.

What other information?

The investigation highlighted significant information gaps, and this finding represented a key outcome of the exercise. In this respect, however, there are initiatives in place or under way to address key elements of the gaps. These include:

- ***Māori Business Identifier.*** Statistics New Zealand is working to develop a Māori business identifier for the Business Frame to allow tracking of Māori businesses, including those in tourism industries. Implementation of this capability will significantly increase understanding of Māori businesses across the economy.
- ***Māori Tourism Business Directory.*** The Poutama Trust has developed an online database containing information on Māori tourism businesses, products and contact details. The information is available at the websites: www.tourismmaori.com and www.poutama.co.nz. The latter also includes non-tourism Māori businesses.
- ***Demand for Māori Cultural Tourism.*** This Ministry of Tourism and Tourism New Zealand project builds on Tourism New Zealand's earlier *Demand for Cultural Tourism* report and is designed to provide in-depth understanding of the demand factors relating to Māori tourism products and services. Both reports can be accessed at www.trcnz.govt.nz and www.tourism.govt.nz.
- ***Tourism Research Index.*** There is a substantial body of research undertaken on a range of Māori-related tourism research. These studies can be identified from the tourism research index at the TRCNZ website: www.trcnz.govt.nz.

Together, these initiatives have put in place a considerable body of information for stakeholders to use in a range of applications for Māori tourism development.

Māori in Tourism

This section explores data from the population censuses conducted in 1991 and 2001. Owing to changes to the ethnicity question in 1996, data from this census is not used in this analysis.

With the census having almost full coverage of the population in New Zealand, it is a powerful source of quality data for analysis. However, because of the complex nature of the tourism industry, the analysis undertaken in this project is subject to the following limitations that need to be considered when interpreting the data.

- The industry groups used in the employment data are broad and do not fully reflect the characteristics of the tourism industry. Useful analysis can be conducted only across what are known as the *Tourism-Characteristic Industries* that cover the broad sectors of: accommodation, cafes and restaurants, transport and storage, and cultural and recreational services.
- It is important to recognise that some services of the *Tourism-Characteristic Industries* are not determined by tourism demand (eg taxi and restaurant services used by local residents, as opposed to the same services used by tourists), and as a result the exact census data will overstate tourism employment in these sectors.
- Tourism-related employment in non-*Tourism-Characteristic Industries* cannot be obtained directly from the census data, which results in understatement of tourism-related activity. For instance, employment in the building construction sector that is associated with the building of new hotels cannot be identified from census data.

Because of these limitations, the following approach was used in conducting this research analysis:

1. To gain an appreciation of the real level of Māori employment generated by tourism, an overall estimate of Māori full-time equivalent (FTE) employment in tourism was prepared by relating census data to the Tourism Satellite Account framework and applying appropriate tourism ratios to census data within each tourism industry group.
2. The *Tourism-Characteristic Industries* employment data obtained from the 1991 and 2001 censuses have been used directly to analyse trends, characteristics and levels of participation in these key tourism industry sectors.

Estimates of Total Māori Employment in Tourism

The Tourism Satellite Account (TSA), which is prepared by Statistics New Zealand, shows that for the year ended March 2001, tourism demand supported 164,000 full-time equivalent jobs (FTEs), comprising 99,000 FTEs directly and 65,000 FTEs indirectly associated with tourism.

To establish an estimate of the proportion of this employment that can be attributed to Māori, it is possible to relate the census data to the TSA framework.

This is achieved by applying the TSA tourism ratios to the census data on Māori employment.² Tourism ratios are used in the TSA to attribute tourism activity to standard industry groupings and provide the best available means for attributing Māori employment data within the standard industry groups to tourism activity.

The results of this analysis are set out in Table 1, with the key figures including:

- Total Māori employment supported by tourism demand is estimated to be 18,368 FTEs, comprising 11,094 direct FTEs and 7,274 indirect FTEs.
- Māori employment comprises 11% of total tourism-related employment (direct and indirect, based on the TSA analysis). Note that the Māori share within the *Tourism-Characteristics Industries* group was slightly higher at 12%.

Table 1: Estimated Māori and Total Net Full-Time Equivalent Tourism Employment, 2001

Industries	Gross FTE Employment ⁽¹⁾		Tourism Ratios ⁽²⁾	Net FTE Tourism Employment ⁽³⁾		Māori Share in Tourism
	Total	Māori		Total	Māori	
Direct Tourism						
Accommodation	21,689	2,521	0.6604	14,324	1,665	11.6%
Cafes and Restaurants	43,142	5,525	0.3911	16,871	2,161	12.8%
Transport and Storage	50,088	5,752	0.4900	24,543	2,818	11.5%
Cultural and Recreational	26,262	3,053	0.1477	3,880	451	11.6%
Tourism-related Retail Trade	175,732	14,739	0.1134	19,919	1,671	8.4%
Other	1,158,687	124,716	0.0187	21,634	2,329	10.8%
Total Direct Tourism	1,475,601	156,306		101,172	11,094	11.0%
Indirect Tourism⁽⁴⁾				66,331	7,274	11.0%
Total Tourism				167,503	18,368	11.0%

(1) Based on Census 2001 employment data (FTE = full-time + 0.5 part-time).

(2) Tourism Satellite Account 2001 ratios, proportions due to tourism demand.

(3) Net FTE = Gross FTE x Tourism Ratios.

(4) Estimated, based on TSA 2001 indirect employment proportion (39.6% of total).

² This methodology estimates total tourism FTEs to be 168,000, which is reasonably consistent with the TSA figure of 164,000. The slight difference may be due to the census data being as at 6 March 2001, while the TSA data is an average over the year ended March 2001.

Characteristics of Māori Employed in Tourism-Characteristic Industries

The use of census data for 1991 and 2001 provides an opportunity to examine characteristics and trends over this period. The census is conducted every five years and provides comprehensive measures of the demographic characteristics of the New Zealand population, including detailed information on Māori. Owing to changes to the ethnicity question in 1996 affecting data consistency, this census data is not used in the analysis.

The purpose of this section is to examine the employment composition and characteristics of Māori within the *Tourism-Characteristic Industries*. Key results are given below.

• Employment Growth

Total tourism employment (full-time and part-time) in the *Tourism-Characteristic Industries* increased by 36% (from 120,630 to 163,767) over the 1991–2001 period. For Māori, the growth rate was twice as fast, increasing by 72% (from 11,628 to 19,959)³.

Table 2: Māori and Total Employment⁽¹⁾ in Tourism-Characteristic Industries, 1991 and 2001

Status in Employment and Tourism-Characteristic Industries	Māori Ethnic Group ⁽²⁾			Total Population ⁽³⁾		
	Census Year		Percentage Change 1991–2001	Census Year		Percentage Change 1991–2001
	1991	2001		1991	2001	
Employee						
Accommodation	2,217	2,997	35%	18,768	21,090	12%
Cafes and Restaurants	2,163	6,561	203%	22,113	46,542	110%
Transport and Storage	3,666	5,436	48%	38,823	43,695	13%
Cultural and Recreational Services	2,478	3,177	28%	21,312	24,816	16%
Total Employees	10,530	18,174	73%	101,016	136,143	35%
Employer						
Accommodation	117	192	64%	3,042	4,827	59%
Cafes and Restaurants	219	429	96%	4,950	7,161	45%
Transport and Storage	441	666	51%	4,785	9,006	88%
Cultural and Recreational Services	324	498	54%	6,837	6,627	-3%
Total Employers	1,101	1,785	62%	19,614	27,624	41%
Total						
Accommodation	2,334	3,189	37%	21,810	25,917	19%
Cafes and Restaurants	2,382	6,990	193%	27,063	53,703	98%
Transport and Storage	4,107	6,099	49%	43,614	52,701	21%
Cultural and Recreational Services	2,805	3,675	31%	28,146	31,443	12%
Total	11,628	19,959	72%	120,630	163,767	36%

Source: Statistics New Zealand, Census of Population and Dwellings, 1991 and 2001

(1) Census usually resident population count aged 15 and over who stated they were either an employee (paid or unpaid) or employer/self-employed.

(2) Census usually resident population count of the Māori ethnic group.

(3) Census usually resident population count.

All cells in this table have been randomly rounded to base 3. Individual figures may not sum to the total.

By comparison, employment growth in the total economy over the same period was relatively slower, at 21% for total population and 56% for Māori.

Higher Māori employment growth lifted its share of employment within the *Tourism-Characteristic Industries* from 9.6% in 1991 to 12.2% in 2001. By comparison, the adult Māori population aged 15 years and over in 2001 was 11.4% of the total New Zealand population.

³ The figure of 19,959 total Māori employment in *Tourism-Characteristic Industries* includes full-time and part-time employment, and so differs from the TSA-derived figure in Table 1, which is based on 'full-time equivalent' employment with tourism ratios applied.

In 2001, 35% of Māori employed in *Tourism-Characteristic Industries* were engaged in the cafe-restaurant sector, while 31% were in transport-storage, 18% in cultural and recreational services, and 16% in the accommodation sector.

Analysis of 2001 Census data provides a number of insights into the characteristics of Māori employment in the *Tourism-Characteristic Industries*, as shown in Table 3.

Table 3: Summary of Māori and Total Employment⁽¹⁾ in Tourism-Characteristic Industries, 2001

Characteristics of Employed Population	Māori ⁽²⁾ in TCI		Total ⁽³⁾ TCI		All Industries	
	Number	Percent	Number	Percent	Number	Percent
Gender						
Male	8,967	45%	80,037	49%	922,959	53%
Female	10,992	55%	83,733	51%	804,312	47%
Total	19,959	100%	163,767	100%	1,727,271	100%
Age Group						
15-29	8,838	44%	58,371	36%	446,091	26%
30-39	4,575	23%	35,628	22%	421,578	24%
40-49	3,627	18%	33,135	20%	424,653	25%
50-64	2,703	14%	32,931	20%	385,017	22%
65 and Over	213	1%	3,702	2%	49,932	3%
Total	19,959	100%	163,767	100%	1,727,271	100%
Hours of Work						
Full-Time (30+ hours)	11,865	63%	105,822	67%	1,328,118	77%
Part-Time (under 30 hours)	7,062	37%	52,080	33%	399,153	23%
Total Stated ⁽⁴⁾	18,930	100%	157,902	100%	1,727,271	100%
Qualification						
None	6,027	33%	32,637	21%	335,715	23%
School	8,016	44%	74,004	48%	642,495	45%
Vocational	3,351	19%	33,144	22%	387,234	27%
Degree	663	4%	14,190	9%	75,414	5%
Total Stated ⁽⁴⁾	18,057	100%	153,975	100%	1,440,858	100%
Employment Status						
Employees	18,174	91%	136,143	83%	1,336,206	80%
Employers	1,785	9%	27,624	17%	342,747	20%
Total Stated ⁽⁴⁾	19,959	100%	163,767	100%	1,678,953	100%
Tourism-Characteristic Industry						
Accommodation	3,189	16%	25,917	16%	--	--
Cafes and Restaurants	6,990	35%	53,703	33%	--	--
Transport and Storage	6,099	31%	52,701	32%	--	--
Cultural and Recreational	3,675	18%	31,443	19%	--	--
Total	19,959	100%	163,767	100%	--	--
Median Income⁽⁵⁾	\$18,200	--	\$21,200	--	\$27,300	--

(1) Census usually resident population count aged 15 and over who stated they were either an employee (paid or unpaid) or employer/self-employed.

(2) Census usually resident population count of the Māori ethnic group.

(3) Census usually resident population count.

(4) Based on people who stated this variable.

(5) A middle income, with one half of workers earning above and the other half below this level.

All cells in this table have been randomly rounded to base 3. Individual figures may not sum to the total.

• Gender

Overall, the *Tourism-Characteristic Industries* employed slightly more females (51%) than males (49%). For Māori, the gender difference was greater, with 55% females and 45% males.

Among the Māori group, in the accommodation and cafe-restaurant sectors, females were more highly represented (75% and 68% respectively). In contrast, the transport-storage sector was predominantly male (70%). The cultural-recreational sector was more evenly spread, with slightly more females (53%).

- **Age Distribution**

A characteristic of the tourism workforce is the high proportion of young workers, with 36% under 30 years of age in 2001. The Māori tourism workforce was younger still, with 44% under 30 years. The median age of the tourism workforce was 32.4 years for Māori and 36.7 years for the total tourism sector.

- **Hours of Work**

Another characteristic of the workforce in the *Tourism-Characteristic Industries* is the high proportion of workers who are employed on a part-time basis (less than 30 hours per week). In 2001, 33% of the total tourism workforce worked part-time. This was a significantly higher proportion than the 23% figure for all industries.

Māori are more likely to work part-time in *Tourism-Characteristic Industries* (37%). Within the accommodation and cafe-restaurant sectors, the proportion working part-time was greatest at 48%.

Females comprised 70% of part-time Māori workers. The highest proportion of part-time work was in the accommodation and cafe-restaurant sectors, in which more than half of females worked part-time.

Part-time employment was more common among Māori workers under 30 years of age, with 44% working part-time. Māori also had a higher proportion working part-time across all age groups.

- **Education**

In 2001, the total workforce in the *Tourism-Characteristic Industries* had the following educational qualification profile: 21% had no formal qualifications, 48% had school qualifications, 22% had vocational qualifications and 9% had degree qualifications.

By comparison, the Māori tourism workforce had lower qualification attainment: 33% had no formal qualifications, 44% had school qualifications, 19% had vocational qualifications and 4% had degree qualifications.

In examining the qualification levels of the tourism workforce, it is important to note the nature of the tourism industry. Tourism is a service industry with a high level of customer and related services. A relatively high proportion of the tourism employment is part-time and on a casual or seasonal basis, for which a high level of formal qualification is not generally necessary.

Students contributed to a significant proportion of part-time employment in the tourism industry. This was most notable in the cafe and restaurant sector, where Māori students accounted for about one-third of the part-time workers.

- **Employment Status**

The total workforce in *Tourism-Characteristic Industries* comprised 83% employees and 17% employers. The Māori workforce comprised 91% employees and 9% employers.

Of Māori employers, a large proportion were small operators, with 65% being self-employed without employees.

- **Income Levels**

Income levels of workers are influenced by the nature of their employment. Because tourism employment has a relatively high proportion of part-time work and lower requirement for educational qualifications, their income levels can be lower than for other sectors. For instance, the workforce in *Tourism-Characteristic Industries* had a median income level of \$21,200, compared with \$27,300 across all industries, which was strongly related to the higher proportion of part-time work in the tourism sector (33%) compared with all industries (23%).

Within *Tourism-Characteristic Industries*, the median income for Māori workers (\$18,200) was 14% lower than for all tourism workers (\$21,200). Again, this was partly due to a relatively higher proportion of Māori working part-time.

At the higher income end, 10% of the total *Tourism-Characteristic Industries* workforce earned \$50,000 or more, compared with 5% of the Māori workforce in these industries.

In terms of gender differences, 66% of Māori females earned \$20,000 or less, compared with 41% of Māori males. This is largely due to a much larger proportion of females working part-time (47%) than males (25%). The median income for Māori males was \$23,500, compared with \$14,700 for females.

Visitors' Participation in Māori Cultural Tourism

International Visitors

The International Visitor Survey (IVS) provides a measure of what visitors do and spend while in New Zealand. The IVS is based on interviews with 5,000 departing international travellers (aged 15 and over) each year and is designed to generate reliable data on national-level indicators, such as expenditure, travel patterns and activities undertaken.

Among activities measured in the IVS are three categories of Māori cultural activities: Māori performances, marae visits and Māori-organised activities (ie tourism activities such as tours, crafts, adventure and ecotourism activities that also incorporate a significant element of the Māori culture). The data provides an indication of the participation levels and trends for key elements of the Māori cultural activities experienced by tourists. It does not include some other activities that have elements of Māori culture, such as visiting museums with Māori exhibits.

Growth Trends

Participation in Māori cultural tourism activities by international visitors increased by 11% over the 1998–2003 period, compared with a 42% increase in visitor arrivals. This difference in growth rates resulted in the proportion of tourists who participated in Māori cultural experiences declining from 22.9% in 1998 to 17.8% in 2003.

Participation levels have been adversely affected by world events in recent years, with significant drops in visitors from Asia (in 1998 and 2003) and the US (in 2001). These markets have traditionally provided half of the visitors to Māori cultural activities.

Table 4: International Visitors⁽¹⁾ who Experienced Māori Cultural Activities, 1998–2003

Māori Cultural Activity	1998	1999	2000	2001	2002	2003
International Visitors						
Māori Performances	234,000	240,000	286,000	269,000	285,000	258,000
Māori-organised Activities	113,000	116,000	117,000	120,000	121,000	107,000
Marae Visits	86,000	78,000	83,000	44,000	44,000	33,000
Total Experience ⁽²⁾	307,000	311,000	358,000	332,000	359,000	340,000
Annual Change (%)						
Māori Performances	..	2.6	19.2	-5.9	5.9	-9.5
Māori-organised Activities	..	2.7	0.9	2.6	0.8	-11.6
Marae Visits	..	-9.3	6.4	-47.0	-	-25.0
Total Experience	..	1.3	15.1	-7.3	8.1	-5.3
Percentage Distribution (%)						
Māori Performances	76.2	77.2	79.9	81.0	79.4	75.9
Māori-organised Activities	36.8	37.3	32.7	36.1	33.7	31.5
Marae Visits	28.0	25.1	23.2	13.3	12.3	9.7
Total Experience ⁽²⁾	100.0	100.0	100.0	100.0	100.0	100.0
Proportion of International Visitors Who Experienced Māori Culture Activities (%)						
Māori Performances	17.4	16.7	18.0	15.9	15.9	13.5
Māori-organised Activities	8.4	8.0	7.4	7.1	6.7	5.6
Marae Visits	6.4	5.4	5.2	2.6	2.5	1.7
Total Experience ⁽³⁾	22.9	21.6	22.6	19.6	20.0	17.8

Source: International Visitor Survey

(1) Aged 15 years and over.

(2) The sum of individual activities is greater than total tourist experience, as a tourist may have one or more activities.

(3) Proportion of international tourists who experienced one or more Māori cultural activities.

Over the period 1998–2003, participation levels in Māori performance activities increased by 10%, while Māori-organised activities decreased by 5% and marae visits declined by 62%. The proportion of international tourists experiencing these activities also declined. (The apparent large decline in marae visits may be partly due to similar activities increasingly being provided as part of Māori tourism packages, and therefore may not be reported separately by tourists in the survey, resulting in under reporting.)

Characteristics of International Visitors

This section examines the characteristics of international tourists who experienced at least one of the three categories of Māori cultural activities as set out in Table 5. The base year for this analysis is 2002 (a year in which the demand pattern was least distorted by major world events).

Table 5: Characteristics of International Visitors⁽¹⁾ who Experienced Māori Cultural Activities, 2002

Tourist Characteristics	Visitors Experienced Activities in:			Total Visitor Experience		
	Māori Performances	Māori-organised Activities	Marae Visits	One or More Māori Cultural Activities ⁽²⁾	Distribution of Visitors who Experienced Māori Culture Activities (%)	Proportion of Visitors who Experienced Māori Culture Activities ⁽³⁾ (%)
Gender						
Male	136,000	61,000	20,000	171,000	47.6	17.2
Female	149,000	60,000	24,000	187,000	52.1	23.4
Total	285,000	121,000	44,000	359,000	100.0	20.0
Age Group (Years)						
15-24	34,000	17,000	5,000	44,000	12.3	17.2
25-34	55,000	22,000	12,000	73,000	20.3	17.1
35-44	42,000	20,000	5,000	53,000	14.8	16.5
45-54	60,000	20,000	7,000	70,000	19.5	19.5
55-64	56,000	28,000	9,000	75,000	20.9	26.8
65 and Over	36,000	13,000	4,000	44,000	12.3	29.3
Total	285,000	121,000	44,000	359,000	100.0	20.0
Main Purpose for Visit						
Holiday	237,000	99,000	35,000	297,000	82.7	29.4
Visit Friends or Relatives	20,000	9,000	3,000	26,000	7.2	8.2
Business	11,000	5,000	2,000	14,000	3.9	4.8
Other	17,000	8,000	4,000	22,000	6.1	12.3
Total	285,000	121,000	44,000	359,000	100.0	20.0
Travel Style						
Tour Group	53,000	17,000	5,000	60,000	16.7	46.0
Package Traveller	81,000	38,000	7,000	98,000	27.3	39.6
Fully Independent Traveller	96,000	40,000	15,000	125,000	34.8	12.6
Semi-independent Traveller	55,000	27,000	16,000	76,000	21.2	17.7
Total	285,000	121,000	44,000	359,000	100.0	20.0
Key Markets						
United Kingdom	40,000	18,000	9,000	55,000	15.3	24.9
Japan	39,200	8,000	3,700	44,600	12.4	26.7
Australia	31,000	24,000	8,000	44,000	12.3	8.4
United States of America	31,000	16,000	8,000	41,000	11.4	22.6
South Korea	32,600	11,200	2,000	39,000	10.9	41.5
China	21,800	8,100	800	24,800	6.9	36.6
Taiwan	15,700	4,600	200	16,300	4.5	42.1
Germany	9,100	5,500	2,500	13,100	3.6	27.5
Canada	7,000	5,000	2,000	11,000	3.1	29.3
Other Countries	57,000	21,000	8,000	71,000	19.7	16.9
Total	285,000	121,000	44,000	359,000	100.0	20.0

Source: International Visitor Survey

(1) Aged 15 years and over.

(2) The sum of individual activities is greater than total visitor experience, as a tourist may have one or more activities.

(3) Proportion of all international visitors in a given group who experienced one or more Māori cultural activities.

- **Gender**

Of the international tourists who experienced Māori cultural activities, 52% were females and 48% males, despite the fact that females comprised only 41% of all visitors to New Zealand.

Female visitors had a greater propensity to experience Māori cultural activities (23% of total female visitors, compared with 17% of males).

- **Purpose of Visit**

Of visitors who experienced Māori cultural activities, 83% were on holiday. The rest were visiting friends or relatives (7%), on business (4%), or in New Zealand for other purposes (6%). Holiday visitors had the greatest propensity to experience Māori cultural activities (29%), compared with 13% for the rest of the traveller groups.

- **Travel Style**

Fully independent travellers (FIT) made up the majority (56%) of visitors to New Zealand and also the largest proportion (35%) of tourists to have experienced Māori cultural activities. Tour groups and package travellers accounted for 17% and 27%, respectively, and semi-independent travellers (SIT) made up the remaining 21%.

Tour groups (at 46%) and packaged travellers (at 40%) had the greatest propensity to experience Māori cultural activities because such activities are often included in tour packages. In comparison, SIT and FIT travellers had a lower propensity to experience Māori cultural activities, at 18% and 13%, respectively.

- **Key Markets**

In 2002, the top nine markets provided 80% of international visitors who experienced Māori cultural activities. Of these, the United Kingdom provided most (15%), followed by Japan (12%), Australia (12%), the United States (11%) and South Korea (11%). However, in 2003 the Australia market emerged as the largest market (20%), partly due to the expansion in trans-Tasman travel resulting from a competitive aviation market, and partly to the slump in Asian visitors caused by SARS.

Visitors from Taiwan (at 42%) and South Korea (at 41%) had the greatest propensity to experience Māori cultural activities, followed by China (37%), Canada (29%), Germany (28%), Japan (27%), the United Kingdom (25%) and the United States (23%).

Australia was New Zealand's largest inbound market, but had a lowest propensity to experience Māori cultural activities (8.4% in 2002 and 10.6% in 2003).

- **Regional Distribution**

The Bay of Plenty region, predominantly Rotorua, hosted the majority (92%) of Māori cultural activities experienced by international visitors in 2002. The balance of activities took place in Auckland (3%), Waikato (3%), Northland (1%), the South Island (2%) and in the lower half of the North Island (1%). This mix is likely to change as Māori cultural products are increasingly offered in different regions.

Domestic Visitors

The Domestic Travel Survey (DTS) provides measures of travel experience within New Zealand. The DTS collects data each year from 15,000 New Zealand residents aged 15 and over, and is designed to generate reliable data on indicators such as expenditure, travel patterns and activities undertaken, at both national and regional levels.

Among the travel activities surveyed is a general category on Māori cultural activity/experience. Given that this group has no sub-categories and because of low response levels, the data quality is not considered sufficiently robust to support detailed analysis.

The key measure that can be drawn from the survey is that only a small proportion of New Zealand domestic overnight travellers (approximately 0.5% or 80,000) undertook Māori cultural activities during their travels in 2001.

By comparison, 19.6% (or 332,000) of international visitors experienced a Māori cultural activity in the same year.

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Key Information Sources

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Tourism New Zealand	www.tourisminfo.govt.nz www.newzealand.com
Statistics New Zealand	www.stats.govt.nz
Poutama Trust	www.tourismmaori.com www.poutama.co.nz