

**Sustainable Tourism in New Zealand:
The Chinese Visitors' View**

by

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A Master of Tourism Management report prepared for the Ministry of Tourism Research
Scholarship

Victoria University of Wellington

2009

Executive Summary

This study addresses sustainable tourism in New Zealand, in the context of the Chinese inbound visitor market to New Zealand. The purpose of this research was to achieve a better understanding of environmental sustainability in New Zealand's tourism industry, how this impacts on New Zealand's marketing image, and the way the New Zealand tourism industry caters to the Chinese inbound visitor market.

The research statement for this study was:

Sustainable Tourism in New Zealand: The Chinese Visitors' View

To investigate the above research statement, the following research aims were formulated:

1. Enhance existing knowledge of the Chinese visitor market to New Zealand.
2. Establish whether the sustainable development of a destination influences the travel decisions of Chinese visitors and how this impacts on New Zealand's tourism industry.
3. Achieve a better understanding of the Chinese visitor's view and the tour operator's view of sustainable tourism in New Zealand.
4. Identify whether New Zealand's '100% PURE' tourism campaign is effectively and efficiently attracting Chinese visitors to New Zealand.
5. Establish how the tour operators promote sustainable tourism to their customers.

Therefore, to achieve the research aims this study focused on the following themes: visitor characteristics, trip characteristics, satisfaction, factors that impact on the visitors' decision to visit a destination, sustainable tourism in New Zealand, and New Zealand's marketing image. This study employed the use of a triangulation research approach where the visitors' perspective was obtained through the use of a visitor survey, whereas the suppliers' perspective was gathered via face-to-face interviews. One of the key challenges of this research was the size of the visitor sample population during the time of this study due to the impact of a number of global issues such as the Sichuan Earthquake, Beijing Olympics, and the global financial crisis; which in essence affected the overall Chinese inbound visitor arrivals to New Zealand.

From the combination of both the quantitative and qualitative data this study indicated that the Chinese visitor market is not as homogeneous as first established by other studies. This research also identified that a number of factors do impact on Chinese visitor travel choice and behaviour, such as safety and security, as well as the destination having a high level of environmental protection. A large proportion of Chinese visitors also perceived New Zealand to be more than just a reasonably sustainable tourism destination. This indicates that New Zealand's 'clean, green' reputation does potentially act as a key pull factor in the Chinese visitors' holidaymaking decisions. However, tour operators believe New Zealand has potential to become a sustainable tourism destination; however, more work is needed to retain the tourism industry's environmental 'sustainability'.

Indicated in the findings was the increasing number of Chinese independent travellers visiting New Zealand, emphasizing the change in Chinese outbound traveller preferences. Findings also established that Chinese visitors believe environmental conservation and preservation as a key factor in their decisions to visit a destination, with a large proportion of Chinese visitors identifying New Zealand as a more than just reasonably sustainable tourism destination. Also ascertained in this study was how important Chinese visitors believed it was for tourists to understand 'sustainability', indicating the readiness of Chinese visitors to be educated in relation to 'sustainability' and 'sustainable tourism in New Zealand'. Interestingly, a large number of Chinese visitors have seen New Zealand's '100% PURE' tourism campaign; yet, only a few of these visitors specified the campaign playing a very important factor on their decision to visit New Zealand.

Overall, there is a need for alternative tourism products to maintain the interest of Chinese visitors to New Zealand. It is indicated that current Chinese visitor package tours need to shift focus from being commission-based shopping endeavours to tours that entail aspects that feature the essence of New Zealand and the country's environmental sustainable position. In addition, it is also demonstrated that New Zealand's '100% PURE' tourism campaign is very standardized, and therefore makes it difficult to attract all of New Zealand's key visitor markets. Hence, to effectively attract the Chinese visitor market, New Zealand should adopt a specific promotional venture that takes advantage of the Chinese visitors concern for status, and their developing use of various information sources, such as the Internet, to push a marketing tagline that appeals explicitly to the Chinese visitor market.

Introduction

The objective of this research was to explore the significant role of sustainability in the New Zealand tourism industry to overseas markets such as the Chinese visitor market to New Zealand. This study is of particular importance for the New Zealand tourism industry to develop a better understanding of the key characteristics and attitudes of an increasingly crucial visitor market to New Zealand (China). This entailed the specific examination of: visitor characteristics, trip characteristics, satisfaction, factors impacting on the visitors' decision to visit New Zealand, sustainable tourism in New Zealand, and the New Zealand marketing image. As expressed by the United Nations World Tourism Organization (UNWTO) sustainable tourism is: 'Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities' (UNWTO, 2004). Although it has been acknowledged that the general understanding of the term 'sustainability' encompasses three components: the environmental, the socio-cultural, and the economic; this research will specifically investigate the environmental element of sustainable tourism in New Zealand. The reason for this specification is due to: firstly the resource constraints of this study, such as time and funding to allow for all three components to be investigated. But secondly, with a reputation of being 'clean and green', it is vital that New Zealand upholds this particular image, which largely involves an array of tourism activities and attractions that integrates various aspects of the natural environment.

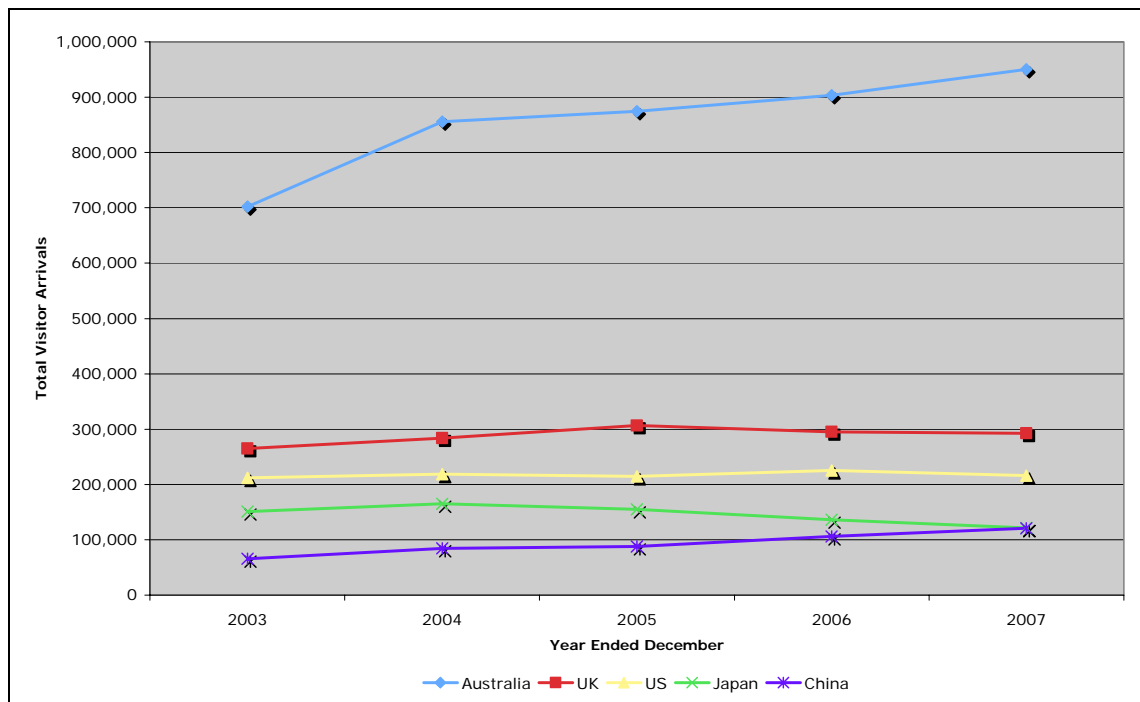
The tourism industry in New Zealand has played a major role in the country's economy, and is now the country's largest export sector (Ministry of Tourism, 2008). The Former Tourism Minister, Damien O'Connor stated that: "Tourism's future depends upon sustainability and delivering greater value from each and every visitor to this country. The industry is one of the most significant contributors to the New Zealand economy" (Beehive, 2008). Hence, emphasis is placed on the need for sustainable tourism in New Zealand and the significant impact it plays on the travel experiences and satisfaction of visitors to the country. At present tourism in New Zealand directly and indirectly contributes \$14.1 billion to the country's total GDP, and maintains 108,100 direct, and 73,100 indirect full-time equivalent jobs (Ministry of Tourism, 2008). In the year ended November 2008 a total of 2,453,555 international visitors arrived into New Zealand, with a total expenditure of \$8.8 billion (YE March 2007) (Ministry

of Tourism, 2008). Therefore, to maintain such levels of visitor arrivals and economic revenue, New Zealand must continue to conserve and preserve resources due to the fact that New Zealand's main attractions having a consistent relationship with the natural environment (Collier, 2006).

Consequently, the Ministry of Tourism developed the New Zealand Tourism Strategy (NZTS) 2010 and 2015. Mr. O'Connor stated that the primary initiative is to give a certain degree of direction for the public and private sector in implementing the objectives of the New Zealand Tourism Strategy and emphasize the government's commitment to the tourism industry in New Zealand (Beehive, 2008). The supporting two values of the Strategy are: **kaitiakitanga** (guardianship) and **manaakitanga** (hospitality) (NZTS 2015, 2007). These values present the basis for the sustainable approach to the development of New Zealand's tourism industry. These two key values are also the foundation for New Zealand's unique approach to sustainability; demonstrating that if the values are delivered, the tourism industry in New Zealand would be able to cater efficiently to their visitors, whilst conserving and managing New Zealand's culture and environment (NZTS 2015, 2007). The Tourism Strategy specifically points out the importance of 'sustainability' in New Zealand's tourism industry, and the nation's exclusive branding. New Zealand's tourism branding focuses particularly on the representation of the natural environment, and with a 'clean, green' marketing image it can be identified that this is what essentially appeals to the country's international visitors; therefore, maintaining this image is vital to attract and retain interest by visitors. Also stated in the Tourism Strategy is the importance in the management of the country's reputation and delivery of tourism products that are sustainable, by doing so it will generate a competitive advantage for New Zealand's tourism industry, but also New Zealand businesses (NZTS 2015, 2007).

Although tourism in New Zealand has presented a number of opportunities, recent statistics have demonstrated that several of the country's key target markets have stagnated or decreased in visitor arrivals, as seen in figure 1.

Figure 1: Top 5 Visitor Markets to New Zealand between 2003-2007



Source: Ministry of Tourism, 2008

Figure 1 illustrates Australia as the country's primary inbound visitor market; Asian visitor markets have increasingly become just as vital to New Zealand's tourism industry. Additionally, with the slight decrease in the number of UK, US, and Japanese visitors to New Zealand, China has begun to draw specific attention in the New Zealand tourism industry. The Chinese visitor market has recently surpassed Japan to become New Zealand's fourth largest inbound visitor market, drawing in a total of 112,398 Chinese visitors in the year ended December 2008; but also bringing in the total expenditure of \$241 million in the year ended September 2008 (Ministry of Tourism, 2008). Although there was an identifiable drop in the number of Chinese visitor arrivals to New Zealand at the end of the 2008-year, as a result of a number of unexpected global issues such as the Sichuan Earthquake, the Beijing Olympics, and the global financial crisis. The Chinese visitor market is developing into a consistently opportunist market that has potential to assist in the sustainability of the tourism industry in New Zealand.

In a tracking survey undertaken by TripVision, it was identified that UK travellers indicate that environmental issues and concern have become increasingly important to consumers, with the demand for holidays and tourism products that are associated with being

'responsible' or 'sustainable', which has potential to increase by 5-fold in the next 5 years (Visit Norwich, 2008). Whilst in the examination of the Chinese outbound market, the incorporation of both the increasing amount of disposable time and income, and the decreasing legislation associated with Chinese visitor travel, Chinese consumers are now beginning to travel more freely. As a result, many Chinese consumers demand more unique tourism products and services to broaden their travel experiences. Due to the fact that a primary motivation for Chinese outbound visitors is to expand their travel experiences, the overall distance from China to New Zealand may not be as much of a concern as it is for visitors from origins such as the UK and US. However, it can also be stated that the awareness of environmentally sustainable behaviour by Chinese consumers is limited in contrast to other markets, for example the European market.

However, the Chinese market still remains quite restricted; and price sensitive, especially if they are first-time travellers (Asia Pacific Foundation of Canada, 2002 in Becken, 2003). Additionally, it has been identified by Tourism New Zealand that the level of satisfaction within the Chinese visitor market to New Zealand is considerably lower than that of other markets (TNZ, 2008). This issue can directly be associated with the large number of commission-based 'shopping tours' that a number of Chinese visitors participate in (TNZ, 2006). Moreover, New Zealand's rich supply of tourism resources such as the relatively untouched natural environment and unique culture appeals to a variety of visitor markets, but can be identified as a key interest for many Chinese visitors due to the fact that many seek tourism experiences that are associated with status or uniqueness (Ryan & Mo, 2001). Nevertheless, with regards to travel experience and environmental concern in comparison to other experienced markets, such as Australia, the UK, and the US, the Chinese visitor market is still undeveloped and under-researched; therefore, it can be conveyed that differing factors may influence the Chinese visitors' holidaymaking decisions. Consequently, it can be established that there may also be differences in the Chinese visitors' behaviours and attitudes towards subjects such as 'sustainability'. Which in turn may result in the need for a change in how the tourism industry caters to Chinese visitors, as well as a potential modification of New Zealand's '100% PURE' tourism campaign to target the Chinese market more exclusively.

Methodology

This study employed the use of a two-type triangulation approach on both data and method as a means of developing avenues to enhance and provide more suitable information. The two research approaches employed in this study were a quantitative approach to assess the Chinese visitors' interpretation of the research problem, and a qualitative approach to gain the understanding of the ADS inbound tour operators perception. Due to the fact that there would only be a limited amount of time available to undertake the research and to collect the data, it was difficult to gain a large sample population from either the quantitative or qualitative techniques; therefore by utilizing both methods the researcher is able to counter the issues with the size of the sample populations by gaining views from both the visitor and supplier.

To provide an in-depth interpretation of the aims, certain variables were identified to ensure that all data was utilized effectively to reach the goals of this study, these variables included: visitor characteristics, trip characteristics, satisfaction, factors that impact on the visitors' decision to visit a destination, sustainable tourism in New Zealand, and New Zealand's marketing image. These variables were essentially developed from the examination of previous literature, and the needs for further research as expressed by Tourism New Zealand and the Ministry of Tourism.

Questionnaires

Questionnaires were employed as the quantitative method of data collection. An exit survey at Auckland International Airport was employed to allow for questions to be asked concerning the visitors' complete trip to New Zealand, as the survey was conducted at the end of their visit. The questionnaires were conducted as an on-site survey. For this study a respondent-completion questionnaire was preferred for practical reasons, due mostly to the language barrier between the potential respondents and researcher.

The criteria set by Auckland International Airport required a COVEC escort to be with the researcher at all times while undertaking the research at the airport, the distribution of the questionnaires could only be done at the departure gates, and not outside or around the waiting lounges, and lastly the research can only be implemented for a 7-day period. As a result of the time and location constraints presented by the criteria set by the Auckland

International Airport, the situation potentially restricted the number of Chinese international visitors to be surveyed, but also the development of a larger sample population. Nevertheless, a 70% response rate was attained, with the final sample size of 70 Chinese international visitors.

Interviews

Interviews of ADS tour operators were employed as the secondary form of data collection and were a key research method in this study to gather 'factual information' with regards to the suppliers' point of view. A non-probability sampling approach was implemented in the selection of participants for the interviews, because this study attempts to develop an understanding of certain concepts and circumstantial factors such as 'sustainability' and the Chinese visitor market. The face-to-face interview technique was employed to investigate inbound tour operators. Interviewees were selected from a list of ADS registered New Zealand tour operators found on the Tourism New Zealand website (www.tourismnewzealand.com). No specific sampling method was employed, due to the limited number of ADS inbound tour operators that promote and market their products to visitors from China.

By gaining the suppliers perspective the researcher is able to undertake a comparative analysis between the visitors perspective, but also to produce a more in-depth understanding of both the Chinese visitor market and 'sustainability'. Interviews took between 20-40 minutes to complete, differing between interviewees. With the study attempting to comprehend various concepts and circumstances connected to 'sustainability', the face-to-face interview method was seen as most suitable to extend insight and awareness.

At the time of sampling and data collection only nineteen inbound tour operators were registered on the ADS list. Eighteen of the tour operators were located in Auckland, with only one tour operator located in Christchurch, which was therefore excluded because of resource constraints such as time and finance. All Auckland ADS tour operators were contacted, with nine tour operators accepting to participate, six declining, and three non-responses to the request for participation; therefore receiving a 36.8% response rate. Two of the tour operators that had agreed to participate in the interview, however did not turn up to the interview appointment, therefore resulting in only seven completed interviews.

Findings

This chapter sets out by summarizing the rationale on why this study was undertaken, and the key findings that will be discussed in the context of the five aims. Essentially, the primary reasoning behind the development of this research was to generate a broader understanding of sustainable tourism in New Zealand. ‘Sustainability’ was identified as being an important concept in the New Zealand tourism industry because of the direct association that many tourism products have with the natural environment and as a priority of the New Zealand Tourism Strategy 2015. This research was conducted on the context of the Chinese inbound market to New Zealand because this visitor market has consistently shown evidence of potential for growth and development. In addition, little is known about the preferences and travel behaviours of the Chinese visitor market; therefore, by examining the visitors’ attitudes towards sustainable tourism in New Zealand it will effectively assist in managing the continuous growth of visitor arrivals, a greater understanding of the visitors, and a broader comprehension of sustainability in New Zealand. Consequently, guiding the ability for the tourism industry in New Zealand to enhance the promotions and the management of tourism products for the Chinese visitor market.

Research Aim One:

Enhance existing knowledge of the Chinese visitor market to New Zealand.

The literature review highlighted the growing significance of the Chinese outbound market to the global tourism industry; however, very little was known about the visitor market to New Zealand. Due to the fact that a number of studies undertaken on the Chinese visitor market in New Zealand are now outdated, this study updated some of the key demographics and trip characteristics of this visitor market. From the quantitative analysis it was identified that there was almost a 50:50 split between the male and female Chinese visitors, with the majority between the age of 30-49 years. It was interesting to find that over 50% of the Chinese visitors to New Zealand came from the East of China; this could be linked to the wider promotions of New Zealand in that area, and from the total respondent population the largest proportion stated that their main place of residence was Shanghai (48.6%); followed by Hu Bei (10%), and Beijing (7.1%). It is acknowledged that the above cities and/or provinces are from differing regions within China, i.e. Shanghai is within the Eastern region, Hu Bei is

within the Southern region and Beijing within the Northern region of China. Therefore, possibly demonstrating the fact that the Chinese visitor market to New Zealand do not appear to only come from one region within China, but visitors come from a variety of cities and/or provinces.

This study specifically identified that there were slightly more Chinese tour groups (54.3%) visiting New Zealand than independent travellers (45.7%). This particular finding indicates the change in travel styles by the Chinese outbound market, in past literature authors have generally emphasized the importance of tour group travel for the Chinese outbound market; yet, this study recognizes the altering travel preferences of the Chinese market. Although there were only two operators out of the seven interviewed that conveyed that their organization had an FIT customer base. The operators identified their FIT customer base as still being relatively small, one particular operator stated that he/she believed that the number of Chinese FIT is still very limited because the market has yet to develop to its full potential, and due to issues such as culture and language the Chinese FIT market has not evolved at the same rate as other markets with regards to travel experience.

With regards to the Chinese visitor trip characteristics, it was indicated that the median number of nights stayed in New Zealand by Chinese visitors was 6 nights, however, according to statistics presented by Tourism New Zealand, it is demonstrated that the median length of stay for Chinese holiday visitors to New Zealand of 3 days (TNZ, 2008). Furthermore, when examining the length of stay with regards to Chinese tour group and independent travellers, it was identified that there was a statistically significant difference between the visitors' length of stay. It was established that over half of the tour group visitors stayed between 4-7 nights; whereas, the majority of the independent travellers stayed in New Zealand in New Zealand for more than 2 weeks. With regards to the New Zealand Islands that the Chinese visitors stated that they visited, it was identified that more tour group visitors toured through both the North and South Islands in comparison to independent traveller. More specifically, half of the tour group visitors visited both the North and South Islands; whereas, the majority of the independent travellers expressed they only visited the North Island. These findings suggest that the Chinese visitor market has begun to mature with regards to their travel experiences, and many tour groups now appear to appreciate the fact that they are not in New Zealand for a long period of time, therefore may be willing to spend slightly more to see and experience the entirety of New Zealand.

In the examination of whether the Chinese visitors have travelled internationally in the last 5 years, it was established that a large proportion of the visitors have (67.1%), with the majority travelling between 1-3 times within those 5 years. Although very few Chinese visitors specified that they had visited New Zealand previously (12.9%), out of those that did just over half stated they have taken 1-2 trips to New Zealand in the past. While investigating the Chinese visitors' trip characteristics, it was identified that 44.3% of the Chinese visitors had visited another country before arriving into New Zealand, and from those visitors the majority had visited Australia. On the other hand when the Chinese visitors were asked if they were going to visit another country after departing New Zealand 87.1% stated that they were not going to visit another country; yet, out of those that conveyed that they were, going to visit another country after they depart over half stated that they were going to visit Australia.

It was established from the findings that the three primary purposes for visiting New Zealand were to: holiday/vacation, visit friends and family, or for business. Identified in this study was the large proportion of Chinese visitors coming to New Zealand for holiday/vacation purposes; this in itself was interesting because of the shift from business travel being the primary purpose over the last decade to many Chinese visitors travelling to New Zealand for alternative reasons. Although a number of Chinese visitors still travel to New Zealand for business reasons, or to attend conferences/conventions, a large degree of Chinese visitors now come to visit friends and family, and as demonstrated in this study with half of the independent travellers stating that they have come to New Zealand to visit friends and family.

With regards to the activities the visitors participated in the majority of both tour group and independent travellers partook in: sightseeing, shopping, and visiting a historical site. This study specifically identified that independent travellers were more willing to participate in activities or view attractions that may be recognized as environmentally-aware, or activities that showcased New Zealand's tourism industry, such as mountain/rock climbing/caving, snow boarding/skiing, or tramping. Whereas, tour group visitors generally participated in more commercialised activities or attractions, such as Maori cultural performances and/or visiting casinos. A potential reason for tour groups participating in a variety of commercialised activities and/or attractions can directly relate to the itineraries set out for them by their travel agents. In many of these situations the travel agents have only a very

limited knowledge of what is available in New Zealand; therefore, they tend to sell the cheaper versions of what they believe to be iconic to New Zealand.

Alternatively, the findings have demonstrated that Chinese visitors have begun to employ the use of a larger array of information sources. Although, a large portion of tour group visitors are still utilizing travel agents as a main source of information (42.1%), a number of them now choose to investigate the tourism products and services they intend to purchase themselves, may it be via the Internet (21.1%), or from the organization they work for or work colleagues (44.7%). Independent travellers on the other hand have begun to research the tourism products and services they are to purchase more widely, employing the use of a variety of sources, such as newspapers/magazines (6.3%), TV/radio (3.1%), and guidebooks (12.5%); indicating the increased engagement and interactivity of Chinese independent travellers.

In the examination of the satisfaction level of the Chinese visitors, there was a 50:50 split between visitors that articulated they were above moderately satisfied with their trip in New Zealand, and those that conveyed they were only moderately satisfied or lower. Interestingly, tour group visitors had a higher level of satisfaction than independent travellers, with no tour group visitors stating that they believed their experience in New Zealand was lower than moderately satisfying. With regards to the findings, it was demonstrated that a key aspect of the visitors' trip in New Zealand that they enjoyed the most was the destination having a 'good environment'. The findings also indicated that there were a number of other examples expressed by the Chinese visitors reflecting the trend towards the importance of the environment, for example the beautiful scenery, the clean/fresh air, the clean 'Green' image, and New Zealand's good conservation/keeping of the environment. Conversely, the areas that were identified as being the least enjoyed generally concerned the impact of the high cost of several components of the visitors' trip, safety and security, and essentially culture and language barriers. When examining the aspects of the visitors trip in New Zealand that they least liked, it was detected that some tour group visitors believed that they weren't given enough time at the visitor sites; whereas, the independent travellers had issues with the difficulty to locate various places, such as attractions because of bad road signage. This becomes a concern due to the fact that there are obvious problems in the way that the Chinese visitor market is being catered to, with regards to both the tour group and independent traveller groups.

This thus demonstrated that existing literature regarding the Chinese visitor market to New Zealand concerning the visitors' demographics and trip characteristics is slightly outdated; and that the Chinese visitor market is maturing with regards to travel experience leading to a shift in travel choices, such as travel style, trip attributes, and activity/attraction choice.

Research Aim Two:

Establish whether the sustainable development of a destination influences the travel decisions of Chinese visitors and how this impacts on New Zealand's tourism industry.

In terms of whether the sustainable development of a destination influences the travel decision of Chinese visitors; this study established that with regards to environmental conservation and preservation, Chinese visitors do believe this to be a key factor that may influence their decisions to visit a destination. This study identified that safety was the primary factor impacting on the visitors' travel decisions (38.6%); however, this was followed by the destination displaying a high level of environmental protection (35.7%), which for example was more important than price. This essentially impacts on New Zealand's tourism industry because it can be acknowledged that the sustainable development of a destination acts as a potential pull factor for visitors to come to a destination. Therefore, if the tourism industry in New Zealand continues to develop and deliver sustainable products the industry may prospectively draw in and retain the country's Chinese visitor market. With these results it can be ascertained that environmentally sustainable tourism is a draw card for many Chinese visitors, either as a 'push' away from their origin, or as a motivation for visiting a destination. However, as indicated by the tour operators, the environmental aspect of a destination is only one factor that may motivate the Chinese visitors' holidaymaking decisions and will not act as the key influencer of their destination choice.

Research Aim Three:

Achieve a better understanding of the Chinese visitors' view and tour operators' view of sustainable tourism in New Zealand.

This study highlighted the fact that 51.9% of the Chinese visitors perceived New Zealand to be more than just a reasonably sustainable tourism destination, with 40.4% of the Chinese

visitors stating that New Zealand was a very sustainable tourism destination. With 75% of the Chinese visitors believing it to be important for tourists to understand ‘sustainability’, indicating that Chinese visitors are willing to be educated about issues that may be associated with ‘sustainability’, or ‘sustainable tourism in New Zealand’. Whereas, four out of seven tour operators interviewed believed New Zealand to be a sustainable tourism destination, the majority conveyed such an insight due to the fact that they believed the New Zealand environment to still be untouched, thus being able to continue attracting visitors. However, two tour operators believe that New Zealand is a sustainable tourism destination; yet, they believe that work is still needed to retain the tourism industry’s environmental ‘sustainability’. One operator drew particular attention to the need for the government to generate policies that are specifically focused on sustainable tourism in New Zealand, with regards to the supply of products, and also the policies involving tour operators. Conversely, another operator conveys that sustainable tourism in New Zealand is still in the development stages. From the findings it is illustrated that a large number of Chinese visitors identify New Zealand’s tourism industry as being reasonably sustainable, in spite of that the majority of tour operators did not think so. This was interesting because the tour operators that work within the tourism industry believe that more is needed to structure a sustainable tourism sector in New Zealand. However, the visitors that come to experience New Zealand portray the country’s environmental sustainability as an enticing characteristic.

Research Aim Four:

Identify whether New Zealand’s ‘100% PURE’ tourism campaign is effectively and efficiently attracting Chinese visitors to New Zealand.

In the findings of this study it was demonstrated that 42.9% of Chinese visitors have seen the New Zealand ‘100% PURE’ tourism campaign; however, this could be due to the large proportion of Chinese visitors in this study coming from Shanghai, where the majority of New Zealand campaigning is done within China. Furthermore, only a few of the Chinese visitors indicated that the ‘100% PURE’ tourism campaign played a very important factor on their decision to visit New Zealand (10%). In fact, nearly half of the Chinese visitors who had seen the campaign expressed that it was only moderately important as a factor that impacted on their decision to visit New Zealand. Yet, when the tour operators were asked whether they believed the New Zealand ‘100% PURE’ tourism campaign would influence the Chinese

visitors decision to visit New Zealand, two operators stated that the campaign is ineffective in influencing the decisions of Chinese visitors based on the fact that many visitors still identify New Zealand as part of Australia, and New Zealand tours are seen as an addition to the overall Australian tour product, one operator adds by articulating the need for more marketing in China to draw attention to New Zealand as a independent destination.

Also identified in this study was that only 30% of the Chinese visitors who have seen New Zealand's '100% PURE' tourism campaign thought it matched exactly what they saw and experienced during their trip in New Zealand. However, 6.7% of the responses conveyed that the '100% PURE' campaign gave the completely wrong impression of what they experienced in New Zealand. Nevertheless, the majority of the Chinese visitors conveyed that the '100% PURE NZ' tourism campaign closely matched exactly what they saw and experienced during their trip in New Zealand. In the review of the messages illustrated in New Zealand's '100% PURE' tourism campaign, Chinese visitors identified that the message of New Zealand being 'unpolluted' as the most strongly associated with the New Zealand tourism campaign. This was then followed by New Zealand having 'outstanding scenery', New Zealand being 'untouched by modern development', and New Zealand having 'many adventure activities'. However, the messages of New Zealand having a 'unique culture', and New Zealand being a 'young country' was not closely associated with the '100% PURE NZ' tourism campaign. This finding may cause some concern for the New Zealand tourism industry due to the fact that the Maori culture is one of the country's primary selling points, and as the New Zealand Tourism Strategy 2015 states the Maori culture adds a unique dimension to the overall tourism product in New Zealand, therefore if not utilized appropriately the destination essentially losses out on a competitive advantage. However, with regards to the message about New Zealand being a 'young country', this message has just been recently implemented, therefore may not be as effective in drawing appeal to audiences.

Research Aim Five:

Establish how the tour operators promote sustainable tourism to their customers.

This study emphasized the fact that very few of the tour operators promote sustainable tourism to their customers. The majority of the tour operators demonstrated that they were merely tour operators, and therefore do not have direct contact with their Chinese visitors

during their trip in New Zealand to educate them. However, they do attempt to employ the use of their tour guides to inform their visitors about certain pieces of information regarding 'sustainability' and 'sustainable tourism in New Zealand'. Several of the tour operators interviewed also expressed that the ADS regulations that they follow places a certain degree of pressure on the quality of their products and services; therefore, impacting on the tourism organizations ability to retain the visitors and fundamentally the tourism product they are attempting to supply. Another way that some tour operators promote sustainable tourism to their customers is through the disapproval of shopping tours. A number of tour operators disapproved shopping tours because they saw that they were closely linked to low quality and unsustainable practices, but the operators also indicated that their organization believes there are other factors that are more important than shopping during their customers visit to New Zealand, such as the environment and culture. This study also identified that only one operator acknowledged the significance of being a Green Globe member in distributing information regarding the importance of sustainable tourism and environmental protection.

Recommendations

In integrating the findings of this research, recommendations transpired for a variety of tourism stakeholders, such as those within the private sector, and public sector. In other words, as the Chinese inbound visitor market to New Zealand continues to develop, there is potential for change with regards to New Zealand's marketing campaign to attract and retain these visitors. At present, not a huge number of Chinese visitors acknowledge that they have heard of the term 'sustainability'; yet many do recognize the significance of a destination having a high level of environmental protection. This particular factor as seen in this study plays a highly significant role in the Chinese visitors' decision to visit New Zealand, just following the concern for safety. The recommendations from the findings of this study will therefore be summarized in the context of the private sector and the public sector. Although recommendations were made from the emergence of various themes in this study, it must be noted that the primary limitation of this research was the restricted sample size; consequently a mixed method approach was employed to attempt to overcome the shortcomings of the small sample.

Recommendations for the Private Sector

This research has identified an array of recommendations for the private sector to take into consideration, whilst they bear in mind the need for sustainable tourism in New Zealand as they target and cater for the Chinese visitor market. With the large amount of tour operators that now target the Chinese visitor market, having the ADS approval system for these tour operators is essential. It was established in this study that the ADS system was acknowledged as a key accreditation to have as a tour operator targeting the Chinese market; yet was identified by tour operators as a system that brought a number of challenges and issues, namely issues regarding tourist itineraries. As these ADS approved tour operators now need to abide by certain criteria and regulations this section aims to recommend various educational procedures, and activities that the tour operators can put in place to reduce their reliance on commissioned shopping tours, to potentially develop revenues by promoting various aspects of New Zealand that could lead to the industry becoming more environmentally sustainable.

As a key recommendation tour operators should expand their knowledge of their products and services to the various parties that sell their tours to inform and educate others about the importance of sustainable tourism in New Zealand. This form of education could potentially extend further by attempting to inform the Chinese visitors upon arrival into New Zealand about environmental sustainability. This would best be done in written and verbal form, as many Chinese recognize the significance of various pieces of information more if written down and given to them in Chinese. Although it is understandable that inbound tour operators do not have direct contact with their visitors during their visit, it is vital that they educate their tour guides about the importance of their conduct and how they are able to inform their visitors about environmental preservation and conservation in New Zealand. By doing so, it may eliminate the potential conflict that may occur between the visitors and host community, but also as a 'face-giving' gesture to the visitor by the tour guide. However, with regards to educating those, such as travel agents, that sell the tour operators' products and services, this becomes an important influence on the types of tours that the visitors will essentially purchase. Hence, if a travel agent was to present a more sustainable tourism product to visitors, stressing the status and potentially better travel experience that comes with this product, visitors may be more inclined to purchase it even if it comes at a slightly higher price than the badly publicized 'shopping tours'.

As established in this study and a number of others, status for Chinese visitors is a highly important factor that influences their preferences and behaviours whilst travelling. Yet, many tourism activities and attractions that are associated with the idea of status are more costly, and due to the fact that the Chinese visitors are more price sensitive in comparison to other visitor markets to New Zealand a number of tour operators have rejected to insert activities that may include a charge, such as wine tasting or whale watching. Instead many tour operators who target the Chinese visitor market take their visitors to attractions that are free of charge, such as national parks, or to scenic spots that are on the same route to commission-based souvenir stores. These occurrences potentially impact on the visitors' level of satisfaction, and their willingness to repeat visit or give positive word-of-mouth recommendations about New Zealand. In general, this will impact negatively on the overall sustainability of the tourism industry in New Zealand, the image of New Zealand's environmental conservation and preservation, but also the retention of the Chinese visitor market due to the fact that there is a high level of dependence on word-of-mouth recommendations.

To promote the status associated with the visitation to New Zealand tour operators should essentially offer visitors itineraries that showcase New Zealand's well-known adventure tourism activities, and wine tourism. The geography of New Zealand offers an admirable opportunity for visitors to enjoy sightseeing activities, but it also supplies a chance for tourists to engage in various recreational and adventure activities, such as hiking, skiing, bungee jumping, and jet boating (Collier, 2006). Adventure activities are seen as being closely associated with status because these activities are generally dependent on natural or environmental attractions; which will vary from destination to destination, thus conveying the 'once-in-a-lifetime' impact of such activities. In addition, as the Chinese visitor market becomes more developed and experienced with travel they may seek differing tourism products and services; hence, shifting from the confined and strict regulations of commission-based shopping tours, to more liberated, all-embracing tours that incorporate a larger array of activities and attractions that support environmental awareness. By doing so, it promotes the importance of the environmental sustainability in New Zealand's tourism industry, but also the significance of the retention of the evolving Chinese visitor market.

A potential recommendation that can be made for both the New Zealand tourism industry and inbound tour operators that target the Chinese visitor market is the incorporation of wine tourism during the visitors' tours around New Zealand. Specific aspects of wine tourism may be a potentially beneficial addition to Chinese visitor tours to New Zealand because it has been established that as the middle class in China increased the appearance of wine as a key status symbol begun to develop. Patricio de la Fuente Saez, director of Links Concept, a Hong Kong-based wine distributor stated that "wine is the latest must-have item in urban China" (Baker *et al.*, 2005, p.3). For that reason, this could essentially assist in the generation of both direct and indirect tourism revenues as the Chinese visitors purchase local wines during their tour to bring back as souvenirs for friends and family. The wine industry in New Zealand is increasingly delivering and trading on the country's 'clean, green' image. By offering tours that integrate the sustainable goals of the New Zealand Tourism Strategy 2015, regarding the need to retain New Zealand's '100% PURE' image, that incorporation of tourism products that are associated with environmentally sustainable objectives will essentially educate visitors, but also increase the sustainability of the tourism industry in New Zealand.

Recommendations for the Public Sector

This research has developed a number of recommendations for the public sector; these recommendations focus specifically on either sustainability or New Zealand's marketing image and campaign. Firstly, it is recommended that Tourism New Zealand continue with the management and monitoring of inbound tour operators that target and cater for the Chinese visitor market. It would essentially be more beneficial if all operators that cater to the Chinese visitor market be monitored and regulated, and not just those registered with the ADS because it would create more stability within the tourism industry as a means of attempting to maintain quality and satisfaction. Additionally, it may be advantageous if there were seminars available for the private sector to reinforce to tour operators and other tourism suppliers the key points of the New Zealand Tourism Strategy 2015. The findings of this study demonstrate that very few of the tour operators interviewed have heard of or comprehend the New Zealand Tourism Strategy 2015, which conveys that the key message of the strategy is not being acknowledged or understood. The purpose of the Tourism Strategy is to attain equilibrium between the operations of financially viable businesses, satisfying visitors, preserving the natural environment, and maintaining the host community (NZTS 2015, 2008).

As illustrated by Tourism New Zealand and a number of other authors the impact of independent travel is seen as the positive alternative to mass tourism. In this study it is demonstrated that the Chinese visitor market is showing signs of maturity and development with regards to the increasing number of independent travellers; yet, it was identified that the tourism industry in New Zealand was not entirely prepared for this change. In general, research has specifically focused on either how the New Zealand tourism industry is able to improve tour group travel from China, or the specific similarities or differences between Chinese tour groups and independent travellers. However, this study indicated the need for the tourism industry in New Zealand to be more prepared for Chinese independent travellers and the potential difficulties they may have with communication and language; therefore providing more information in Chinese at certain tourist points would be advantageous to generate positive tourist experiences.

Thirdly, with regards to New Zealand's marketing image and campaign it was identified in this study that very few Chinese visitors have seen the '100% PURE' tourism campaign, the reason for this could be directly related to the limited budget that Tourism New Zealand has

for campaigning efforts within China. Many Chinese visitors portray their visit to New Zealand as an 'add-on' to an existing tour they are taking to Australia; however, Tourism New Zealand has recently employed the use of media coverage in China to promote New Zealand as a mono-travel destination, which includes episodes of Getaway on Shanghai TV, an eight-page spread in luxury magazine Trading Up, ten stories in the Oriental News Daily, and The Sun covering the Montana World of Wearable Art Awards (TNZ, 2009). Additionally, Tourism New Zealand has launched the third round of the '100% PURE' tourism campaign in China that incorporates the use of TV, LCD screens in over 400 office buildings, interactive touch screens in taxis and a concentrated online promotional programme within the Shanghai region (TNZ, 2009).

Although Tourism New Zealand can be seen implementing an increasingly large proportion of advertising and promotion in China, a number of their marketing strategies and techniques could be altered to maximise its targetability. For example, China Central Television (CCTV) is the oldest and largest television station in China, which suggests that this station has the potential to draw the attention of a larger audience base due to the fact that it is accessible in a larger number of regions within China than Shanghai TV. While Tourism New Zealand has identified Shanghai as a more optimistic region for outbound Chinese visitors than other regions within China, previous studies have demonstrated regions such as Guangzhou and Beijing to also present a high potential for outbound travellers from China (Zhao, 2006). Due to the fact that outbound visitors from Guangzhou and Beijing exhibit a wider spread proportion of mature, middle-class Chinese who have travelled internationally two to three times previously, independently or with their families (Tourism Business, 2007). It is also established that both Beijing (39684RMB) and Shanghai (37585RMB) have the highest average income within China (National Bureau of Statistics of China, 2008); therefore indicating that Beijing should certainly be considered as a promising outbound traveller region by reason of the high level of disposable income of the regions population.

Identified in this study also was the growth in the use of Internet websites both in English and Chinese, and the use of the organization the visitor works for as sources of information. The increased use of the Internet as a source of travel information by the Chinese will potentially be beneficial for tourism promotions because New Zealand will be able to develop marketing approaches that specifically appeal to the Chinese visitor market, for example, instead of having short video clips on the Tourism New Zealand website of interviews with Chinese

visitors in New Zealand, which may only be accessed by a few potential visitors. Tourism New Zealand should consider having videos of Chinese celebrities enjoying and interpreting their experience in New Zealand to audiences. The reason why it is important to implement the use of Chinese celebrities is because Chinese visitors place a lot of confidence in recommendations, and celebrity plays a large impact on the Chinese culture. Word-of-mouth recommendations are significant to the decision making process of Chinese visitors, but only if they believe that the individual giving the advice or recommendation is trustworthy. Additionally, many interactive travellers now search for information on destinations through less conventional methods, such as Twitter.com, which is a personal blogging page where individuals can give accounts of their experiences. This is essentially a more cost effective marketing technique that would reach a larger population in comparison to having large billboards or LCD screens in one or two cities within China; additionally these clips and blogs can also be saved and uploaded onto other electronic media such as podcasts, which will specifically attract the interactive traveller market within China. With regards to the target promotions of New Zealand to potential Chinese consumers, new and improved messages can be employed to push the focus onto sustainable tourism in New Zealand. The reason for employing new messages to be associated with New Zealand's '100% PURE' tourism campaign is that it will assist in the education of the Chinese visitors prior to arrival, but it would also act as a screening process to eliminate unwanted visitors that may not value New Zealand's sustainable goals. Moreover, the alteration of New Zealand's promotional messages may also appeal to the increasing Chinese independent traveller market.

As a means of modifying the New Zealand '100% PURE' tourism campaign to specifically target the Chinese visitor market, a tagline can be employed as a way to draw attention to what New Zealand has on offer for these visitors. A potential tagline that can be implemented is: *'Luxury or Uniqueness that lies within'*. This tagline can essentially be implemented in the same way as the *'What's On'* tagline for Australia; by placing specific emphasis on what can be inserted at the end of the phrase, for example in the case of Australia: *'What's On: Summer 2009'*. Hence, depending on what Tourism New Zealand may want to promote, it will dictate the message during that season, for example *'Luxury that lies within: Nature'*. The primary reason why 'luxury' and 'uniqueness' were utilized as the key draw cards can be related to the increasing demand for status interrelated products and services by Chinese visitors, but also because of the uniqueness that is associated with luxury products.

On the other hand, a method at which the public sector is able to tap into the business/incentive-based tourist market from China is potentially through having events to showcase New Zealand to organizations in China as a means of promoting the country as a good destination to send their staff as a reward, but also as a country that has potential to assist in the development of their employees understanding of the New Zealand business environment, and the management of the natural environment.

Further Research

This research has sought to fill the research gaps identified by studying sustainable tourism in New Zealand, through the examination of the Chinese inbound market. Although this study has demonstrated a broad understanding of sustainable tourism in New Zealand, the augmentation of existing knowledge of the Chinese outbound market, the various factors that impact on the Chinese visitors decision to visit a destination, and New Zealand's marketing image; the research has generated opportunities that merits further examination. In particular, to obtain a more comprehensive representation of New Zealand's '100% PURE' tourism campaign and how a more effective and efficient marketing strategy can be developed to promote sustainable tourism in New Zealand to visitors. Consumer-based research needs to be carried out to examine further the factors that impact on the Chinese visitors' decision to visit a destination. This consumer-based research should also entail an investigation on various motivations that are associated with sustainable connotations. Establishing the various motivations that visitors may have that are associated with sustainable connotations can result in the tourism industry identifying whether or not sustainable tourism is important to visitors; and if the visitor market(s) have matured with regards to the tourism products and services demanded. In addition, it may be beneficial for researchers to consider studying the impact of the '100% PURE NZ' tourism campaign on Chinese tour group and independent travellers, to essentially identify whether the differing images appeal to differing visitors. This could also lead to research that is undertaken in China to develop an understanding of why some Chinese visitors do not choose to visit New Zealand.

With regards to extending existing knowledge of the Chinese outbound market, it may be interesting to investigate the growing independent traveller market. Due to the fact that a large array of studies have been undertaken to distinguish the similarities and differences between the two travel styles, it would be beneficial to identify what motivates the visitors to travel independently, and what do they expect to experience travelling independently. On the other hand, further research could be undertaken on the similarities and differences between tour group and independent travellers regarding sustainable tourist behaviours; investigating specifically: what they believe sustainable tourist behaviour is, how they believe they act whilst travelling, and if they believe they should act sustainability whilst they are on holiday.

As the final component that calls for future research the potential comparison of the Asian and European markets, and their perspective of ‘sustainability’, or more specifically sustainable tourism in New Zealand should be examined. This specific research area may be of interest to both the public and private sectors of the tourism industry because it can firstly establish whether there is a difference in the understanding of ‘sustainability’ or sustainable tourism in New Zealand by these two visitor groups. But lastly, this type of research would allow the researcher to identify if differing groups may require more assistance when it comes to understanding ‘sustainability’ and sustainable tourism in New Zealand, and by doing so it may alter how suppliers target and cater to their visitors.

Conclusion

The tourism phenomenon has led to a number of benefits for many countries, specifically economic revenue; however, it is evident that negative impacts also arise with the success of this industry. As New Zealand's largest export sector, practitioners and academics have begun to draw particular emphasis on the need for sustainable tourism in New Zealand and the significant affect it plays on the travel experiences and satisfaction of visitors. The New Zealand Tourism Strategy 2015 principally indicates the importance of 'sustainability' in New Zealand's tourism industry, and the country's exclusive branding. Environmental conservation and preservation is of particular importance to New Zealand based on the country's brand focus and the portrayal of the natural environment, with the '100% PURE New Zealand' tourism campaign depicting a 'clean, green' image. Therefore, upholding this image is central to attracting and maintaining interest by international visitors to New Zealand. As China is predicted to be the top source of outbound visitors internationally, it is vital that New Zealand's tourism industry expands its existing knowledge of the market to continue attracting and developing market share. Although a number of unexpected global issues such as the Sichuan Earthquake, the Beijing Olympics, and the global financial crisis have affected the total number of Chinese visitors travelling internationally, this market has become consistently opportunist displaying potential to assist in the sustainability of the tourism industry in New Zealand.

The Chinese outbound market has been considered as a homogenous visitor market; yet, this study has identified a change in travel styles, from the generally emphasized tour group travel to independent travel. While the Chinese visitor market remains under-researched, this market continues to demand tourism products and services that can assist in broaden their travel experiences. Although the Chinese visitor market is still developing, this study has demonstrated that environmental conservation and preservation is a key factor that influences their decision to visit a destination. The significance placed on environmental conservation and preservation by Chinese visitors illustrates their willingness to be educated regarding 'sustainability' and 'sustainable tourism in New Zealand'. Interestingly, a large number of Chinese visitors have seen New Zealand's '100% PURE' tourism campaign; however, very few state that the campaign played a very important factor on their decision to visit New Zealand. Suggesting that the Chinese visitor market is harder to target than expected, with

cultural factors impacting on their perception of destination image. Nevertheless, understanding and acknowledging the position visitors perform in the tourism industry complements the development in the awareness of 'sustainability', and potentially the targetability of the destination marketing brand.