

## TOURIST ACTIVITY | MAORI CULTURAL TOURISM

NEW ZEALAND | SERIES B6 | MARCH 2008



## INTRODUCING THE MAORI CULTURAL TOURISM SECTOR

Maori cultural tourism provides a unique point of difference for the New Zealand tourism industry, and it is popular amongst international tourists, with one in five visitors experiencing a Maori tourism experience. International visitors account for the majority of the demand for Maori cultural tourism.

This report provides an overview of Maori cultural tourism in New Zealand, including trends and characteristics of tourists who have had a Maori cultural experience.

Maori culture tourists, for the purpose of this report, are defined as international and domestic visitors, aged 15 years and over, who have experienced one or more Maori cultural activities. Activities may include Maori cultural performances, marae visits and Maori cultural exchange, or organised Maori related tourist activities while travelling in New Zealand.

Tourists who undertake multiple Maori cultural experiences in a single region or participate in a single Maori cultural activity on more than one occasion are counted only once. In addition, residents who participate in Maori cultural activities within their local area are not included in this definition. Some museum visits also include Maori culture but may not be represented in the data used. Therefore, the figures in this report may understate the actual level of tourist participation in Maori cultural experiences.

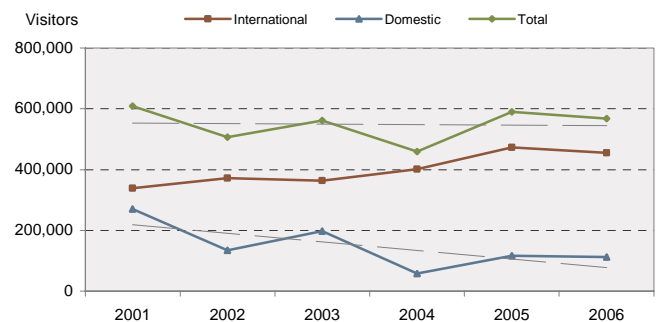
## TRENDS IN MAORI CULTURAL TOURISM

## How many tourists experience Maori cultural tourism?

In 2006 it is estimated that well over half a million (567,200) tourists participated in a Maori cultural experience, comprising 80% international tourists and 20% domestic tourists.

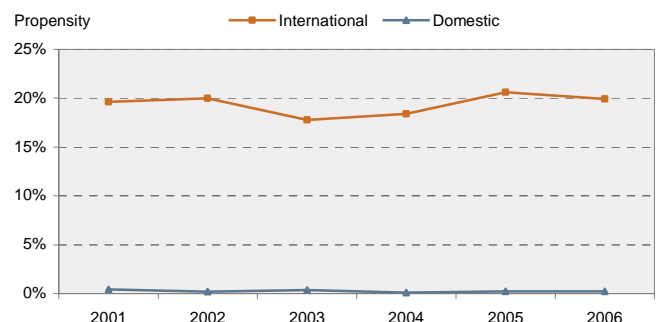
The number of international tourists that experience Maori culture has increased from approximately 338,000 in 2001 to 455,000 in 2006, an annual average growth rate of 6%. Growth was particularly strong during 2003-2005, driven largely by the Australian, UK and Chinese markets. In contrast, the number of domestic tourists who experienced Maori culture generally declined over the 2001-2006 period, reflecting a declining trend in domestic tourism over the same period. The total trend remained flat over this period (Figure 1).

International tourists have a significantly higher propensity, or likelihood, to experience Maori culture than domestic tourists. However, propensity has remained relatively steady over the 2001-2006 period. In 2001, 20% of all international tourists participated in a Maori cultural experience. Over the following years, propensity dropped to a low of 18% in 2003, owing to a significant drop in the Asian markets sparked by the SARS epidemic in that region. The propensity recovered to 20% by 2006.

Figure 1: Maori Culture Tourists, 2001-2006<sup>\*\*1\*2</sup>

Note: Figure 1 refers to occasions or visits undertaken by tourists. Data is sourced from the IVS<sup>1</sup> and DTS<sup>2</sup> surveys. Because of sample errors, data may exhibit volatility. Therefore readers should interpret the results with caution and place greater emphasis on the general trends (broken lines) than on absolute values.

Among domestic tourists, propensity to experience Maori culture is considerably lower, averaging around 0.2% (1 in 500 tourists) over the 2001-2006 period (Figure 2).

Figure 2: Propensity to Experience Maori Culture, 2001-2006<sup>\*\*1\*2</sup>

## Where do tourists go to experience Maori cultural tourism?

The Regional Tourism Organisation (RTO) area which attracted the greatest number of international Maori culture tourists over the 2005/06 period was Rotorua (on average 396,900 Maori culture tourists per year, or 86% of all international Maori culture tourists). This clearly reflects Rotorua's reputation as the 'capital' of Maori cultural tourism in New Zealand. Auckland (15,800, 3%), Canterbury (10,700, 2%) and Northland (10,000, 2%) were the next most popular Maori culture destinations among international tourists.

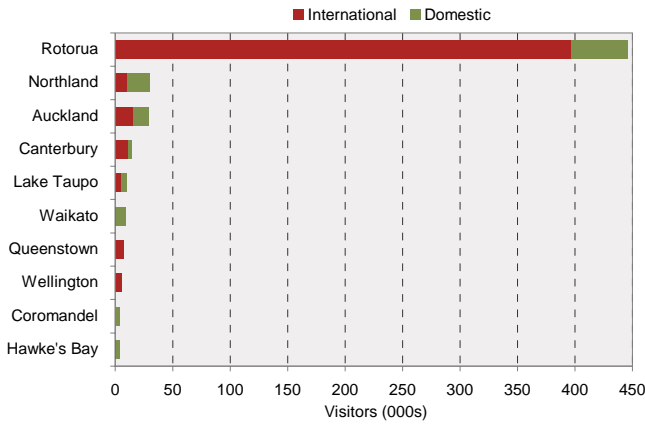
Among domestic tourists the pattern was quite similar, with Rotorua (48,800, 43%), Northland (19,800, 17%), Auckland (13,000, 11%) and Waikato (8,200, 7%) being the RTO areas most commonly visited for Maori cultural tourism (2005/06).

Overall, Rotorua RTO was clearly the most popular region among all tourists for Maori cultural tourism (on average 445,700 Maori culture

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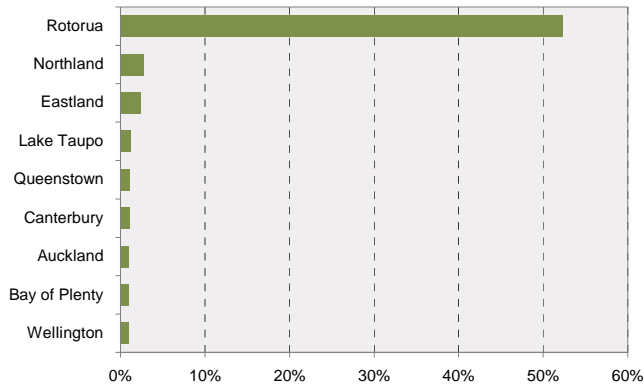
tourists per year over 2005/06). The majority (89%) of Rotorua's Maori culture tourists were international, with the remaining 11% domestic. Northland (29,800) and Auckland (28,800) were the next most popular destinations (Figure 3).

Figure 3: Main RTO Destinations of International and Domestic Maori Culture Tourists, 2005/06<sup>\*1\*2</sup>



Not surprisingly, propensity of international tourists to experience Maori culture was highest in Rotorua RTO, where 52% of all international tourists to the area had a Maori cultural experience of some sort over the 2005/06 period. Propensity in all other areas was well below the average for the period (20%) (Figure 4).

Figure 4: Propensity of International Tourists to Experience Maori Culture by RTO, 2005/06<sup>\*1</sup>

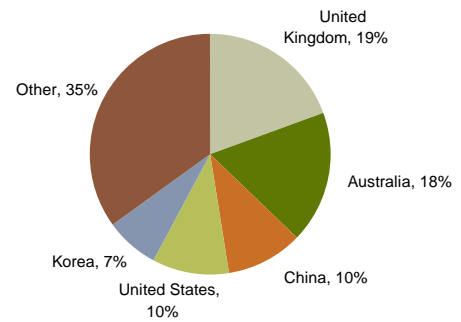


## CHARACTERISTICS OF MAORI CULTURE TOURISTS

### Where do Maori culture tourists come from?

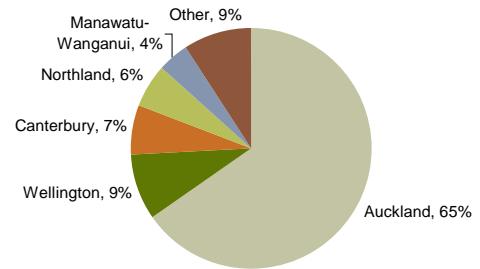
Over the 2005/06 period, 80% of Maori culture tourists were international and 20% domestic (excluding local residents). International visitors from the UK (19%), Australia (18%) and China (10%) accounted for nearly half of all international Maori culture tourists. However, with 35% of Maori culture tourists from countries other than New Zealand's top five markets, attraction to Maori cultural tourism is clearly spread across a wide range of markets (Figure 5).

Figure 5: Origin of International Maori Culture Tourists, 2005/06<sup>\*1</sup>



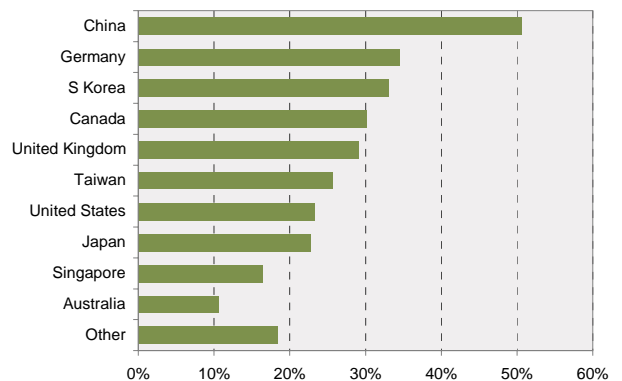
The largest share of domestic tourists to experience Maori cultural tourism over the 2005/06 period was overwhelmingly from the Auckland Region (65%). This is likely due to a large immigrant population in Auckland and its proximity to Rotorua and Northland. (Figure 6).

Figure 6: Origin of Domestic Maori Culture Tourists, 2005/06<sup>\*2</sup>



International tourists with the highest propensity to experience Maori cultural tourism were from China (51% of all Chinese tourists experienced Maori culture in 2005/06), followed by Germany (35%), S Korea (33%) and Canada (30%). Propensity of Australians (11%), our largest international market, was noticeably below the average of 20% (Figure 7).

Figure 7: Propensity of International Maori Culture Tourists by Market, 2005/06<sup>\*1</sup>



Propensity of domestic tourists to experience Maori culture was highest among those from the Auckland (0.6%), Northland (0.3%) and Hawke's Bay (0.3%) regions.

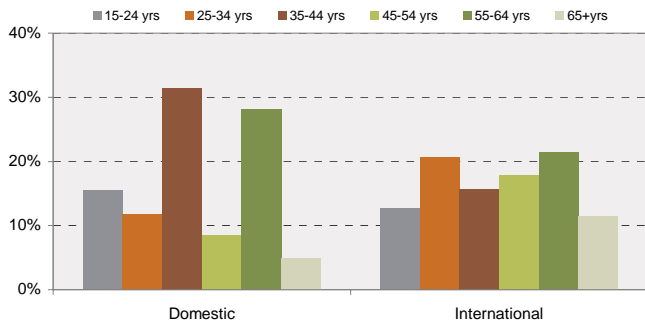
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## What is the age-sex profile of Maori culture tourists?

Among international tourists, there was a relatively even spread of ages among those who experienced Maori culture. Both the 25-34 age group and the 55-64 age group had the highest share at 21% each.

Among domestic tourists, those aged 35-44 years (31%) and 55-64 years (28%) accounted for the largest shares of domestic Maori cultural tourists (Figure 8).

Figure 8: Age Profile of Maori Culture Tourists, 2002/06<sup>\*1\*2</sup>

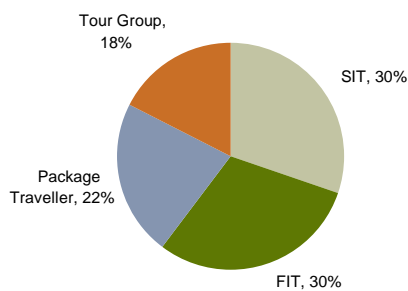


Over 2005/06, females accounted for a higher share of Maori culture tourists among international visitors (55%) and their propensity was also higher at 24%. Among domestic tourists, males accounted for a higher proportion of Maori culture tourists (55%).

## What are the travel styles of international Maori culture tourists?

Semi-independent travellers (SITs, 30%) and fully independent travellers (FITs, 30%) accounted for the largest share of international Maori culture tourists over 2005/06. Those travelling as part of a package tour made up just under a quarter (22%) and the remainder were travelling as part of a tour group (18%) (Figure 9).

Figure 9: Travel Styles of International Maori Culture Tourists, 2005/06<sup>\*1</sup>



*FIT: made all NZ travel purchases after arrival (e.g. dom. airfares, lodging, activities etc.)  
SIT: made at least one travel associated purchase before arrival in NZ.*

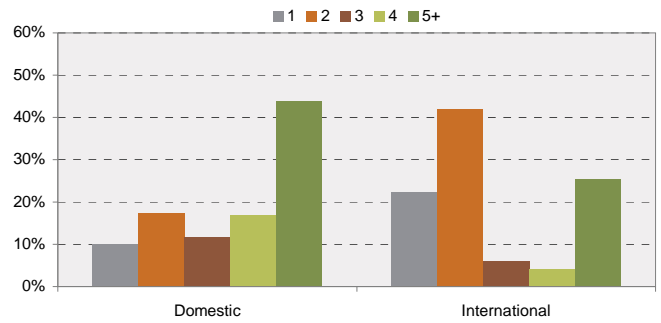
However, propensity to experience Maori culture was clearly highest among those in a tour group (67%) and package travellers (39%). Propensity was relatively lower among SITs (19%) and FITs (12%).

## Who do Maori culture tourists travel with?

The greatest shares of international Maori culture tourists over 2005/06 were travelling with their partner/spouse (32%), or were travelling alone (22%). Propensity was highest among those travelling with a tour group (67%), or with educational groups (47%). Among domestic tourists, Maori culture tourists were most commonly travelling with friends (54%), or with family (50%).

These patterns are also reflected in the group size profile, with international Maori culture tourists predominantly travelling alone (22%) or in groups of twos (42%) and five or more (26%), and domestic tourists predominantly travelling with a larger group of five or more (44%) (Figure 10).

Figure 10: Maori Culture Tourists by Group Size, 2005/06<sup>\*1\*2</sup>

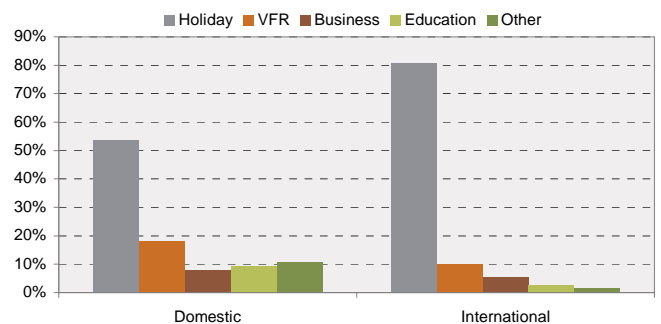


## What are the main purposes of travel of Maori culture tourists?

Tourists on holiday (81%) clearly made up the largest share of international Maori culture tourists over 2005/06. This group also had the highest propensity to experience Maori culture (33% of all international holiday visitors). International tourists visiting friends or relatives made up the second largest group (10%), but their propensity to experience Maori cultural tourism was much lower (7%).

Domestic Maori culture tourists were also predominantly on holiday (54%), followed by those travelling for VFR (18%), education (9%), business (8%) and other purposes (11%) (Figure 11).

Figure 11: Purpose of Travel of Maori Culture Tourists, 2005/06<sup>\*1\*2</sup>



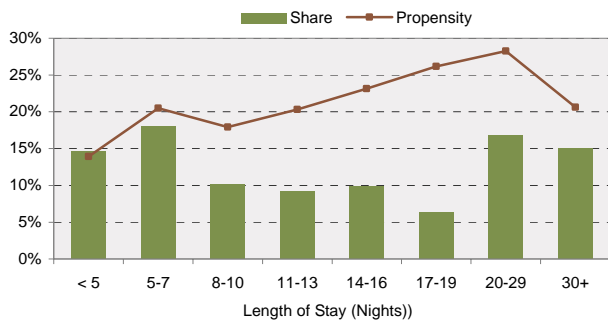
## How long do international Maori culture tourists stay in New Zealand?

International tourists who experienced Maori culture stayed in New Zealand slightly longer on average (21 nights) than all international tourists (20 nights).

Overall, there was a relatively widespread distribution of length of stay among international Maori culture tourists over 2005/06. One third (33%) stayed for seven nights or less, a similar share (35%) stayed for between eight and 19 nights and the remaining third (32%) stayed for 20 nights or more.

Likelihood of experiencing Maori culture clearly increased with length of stay, peaking among those who stayed for 20-29 nights at 28%, before dropping to 21% among those staying 30+ nights (Figure 12).

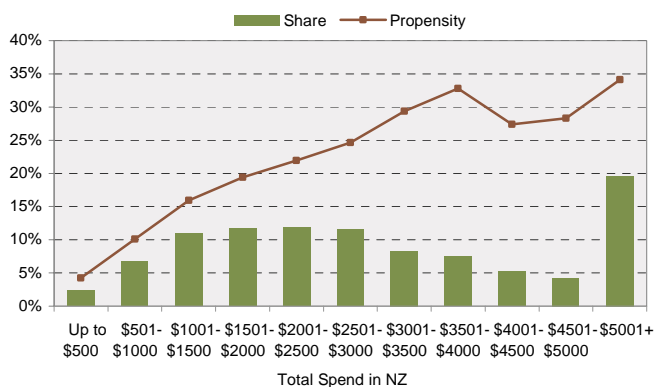
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Figure 12: International Maori Culture Tourist Distribution and Propensity by Length of Stay in NZ, 2005/06<sup>1</sup>**How much do international Maori culture tourists spend on their trip to New Zealand?**

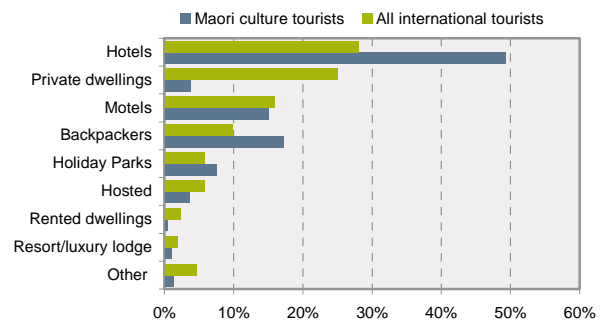
International Maori Culture tourists spent more on average per trip (\$3,970) in 2005/06 than international tourists overall (\$2,850).

In terms of average daily expenditure, Maori culture tourists spent significantly higher (\$190 per night) than international tourists overall (\$140 per night). Therefore Maori culture tourists are relatively high value tourists tending to stay slightly longer and spending more than the average international tourist.

Propensity to experience Maori culture clearly increases with total expenditure. Those who spent in excess of \$3,000 were more likely to experience Maori culture than those spending less than \$3,000 (Figure 13).

Figure 13: International Maori Culture Tourist Distribution and Propensity by Total Expenditure in NZ, 2005/06<sup>1</sup>**What accommodation types do international Maori culture tourists use?**

International Maori culture tourists predominantly stayed in hotels (49% stayed in a hotel at some point on their trip), reflecting the relatively high propensity of package and tour group travellers undertaking this activity. Significant shares also stayed in backpackers (17%) and motels (15%), but few stayed in private accommodation (4%) over the 2005/06 period (Figure 14).

Figure 14: Accommodation of Maori Culture Tourists, 2005/06<sup>1</sup>**What other activities do international Maori culture tourists do?**

Over 2005/06, international Maori culture tourists were more likely to participate in a wide range of activities, which reflected those activities common on a package tour itinerary. These included visits to iconic New Zealand attractions, such as national parks, Fox/Franz Josef Glaciers, parliament buildings and whale watching. Other activities available in the main Maori culture destinations were also common, such as geothermal attractions and farm shows.

Table 1: Trends in Maori Cultural Tourism, 2001-2006<sup>1\*2</sup>

KEY INDICATORS	2001	2002	2003	2004	2005	2006
<b>Maori Culture Tourists</b>						
Total	608,800	506,300	561,800	459,600	589,600	567,200
International	338,200	371,700	364,100	401,700	473,400	455,000
Domestic	270,600	134,600	197,700	57,900	116,200	112,200
<b>Propensity to experience Maori culture</b>						
International	19.6%	20.0%	17.8%	18.4%	20.6%	19.9%
Domestic	0.4%	0.2%	0.3%	0.1%	0.2%	0.2%

Table 2: Maori Culture Tourists by Key Regions and Source Markets 2005/06<sup>1\*2</sup>

Top 5 Destination Regions (RTOs)	Rotorua	Northland	Auckland	Canterbury	Lake Taupo	NZ
International	396,900	10,000	15,800	10,700	5,100	464,200
Domestic	48,800	19,800	13,000	3,400	4,900	114,200
Total	445,700	29,800	28,800	14,100	10,000	578,400
% Share	77%	5%	5%	2%	2%	100%
Top 5 International Source Markets	UK	Australia	China	USA	Korea	ALL
Tourists	89,700	83,300	47,900	47,500	33,300	464,200
% Share	19%	18%	10%	10%	7%	100%
Propensity	29.1%	10.6%	50.7%	23.3%	33.1%	20.3%
Top 5 Domestic Source Markets (Regions)	Auckland	Wellington	Canterbury	Northland	Manawatu-Wanganui	ALL
Tourists	74,400	10,300	7,600	6,700	4,800	114,200
% Share	65%	9%	7%	6%	4%	100%
Propensity	0.6%	0.2%	0.1%	0.3%	0.1%	0.2%

## DATA SOURCES

<sup>1</sup> IVS: International Visitor Survey (Ministry of Tourism)

<sup>2</sup> DTS: Domestic Travel Survey (Ministry of Tourism)

This report is available on [www.tourismresearch.govt.nz/analysis](http://www.tourismresearch.govt.nz/analysis). It has been prepared for the Ministry of Tourism by Market Economics Limited ([www.marketconomics.co.nz](http://www.marketconomics.co.nz)).

## IMAGE CREDITS

Wellington Willis St. – Positively Wellington Tourism, [www.WellingtonNZ.com](http://www.WellingtonNZ.com)

Lake Taupo Lodge – [www.laketapuolodge.co.nz](http://www.laketapuolodge.co.nz)

Cardrona Ski Field – [www.cardrona.com](http://www.cardrona.com)

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Wai-O-Tapu Champagne Pool – Destination Rotorua, [www.rotoruaNZ.com](http://www.rotoruaNZ.com)

Maori Art Fence – Destination Rotorua Tourism Marketing, [www.rotoruaNZ.com](http://www.rotoruaNZ.com)