An Exploration of Tourism, Seasonality, and Market Development in Northland, New Zealand.

A 52.787 thesis presented in partial fulfilment of the requirements for the degree of

Master of Business Studies
in
Management

at Massey University, Albany, New Zealand.

Jane Susan Commons

1999

Abstract

This thesis examines the issue of seasonality of demand in Northland's tourism industry. It approaches this topic from both the demand and supply sides of the tourism industry. The thesis reviews the seasonality literature as it relates to tourism and highlights the paucity of recent research on this issue. The results are presented from three separate surveys of the stakeholders with a vested interest in this issue. A sample of 548 Auckland residents is examined and their potential contribution to Northland's tourism industry is evaluated in relation to seasonality issues. A sample of 23 of Northland's tourism-related businesses is also examined to gain an understanding of the severity of the region's seasonality problems and to show how affected businesses are coping. A sample of 534 visitors to Northland is also examined to assess their experiences of the region and its tourism-related businesses. Together these surveys provide a more holistic assessment of tourism and seasonality and the interrelationship between the factors which shape patterns of holiday travel in the region. The study identifies the groups of visitors most prone to seasonality and also identifies disparities between the behaviours of the sample groups. This may offer a number of options for lessening seasonality and its effects in the region.

Acknowledgements

I would like to thank several people who have made the completion of this thesis possible. Firstly my supervisor Stephen Page, for his seemingly boundless tourism knowledge and continual words of encouragement, both of which were equally valuable.

Secondly, Brian Roberts and the team at Destination Northland for their much-appreciated funding and continued assistance with the formulation, development and outcomes associated with this thesis.

Many thanks to my fellow researcher Kim Burrows for her constant support and assistance during the production of this thesis.

Lastly, I would also like to acknowledge the financial assistance provided by the Department of Management and international Business towards some of the research costs involved.

Table of Contents

List of Figures

List of Maps

List of Tables

1. Introduction

This thesis examines the issue of seasonality in the tourism industry in Northland, New Zealand. Seasonality is traditionally conceptualised as a characteristic of demand and can have the greatest impact on tourism suppliers. This thesis aims to provide a timely illustration of tourism seasonality in an industry where "supply issues still remain poorly researched" (Page and Forer, 1998, p.365). This study has been designed to examine seasonality from both the demand and supply sides of the tourism equation to provide a more complete investigation of the issue. This study focuses on the New Zealand region of Northland to provide a useful setting for an assessment of the effects of seasonality on tourism operators. This region is particularly useful for this purpose for a number of reasons. Firstly, Northland has some of New Zealand's most pronounced seasonal patterns of demand. The region currently displays extreme differences in its visitation levels between its high season and low season. Secondly, despite these high levels of seasonality, there has been a distinct lack of research into seasonality - and indeed tourism in general - in Northland. Page and Forer (1998, p.297) note the lack of reliable data on visitors to Northland and the role this plays as "a major impediment to research and business development in the region". This lack of research in the area allows for an interesting comparison of the assumptions made by suppliers concerning seasonality and the reality of the wants and needs of their customers.

The objectives of this study were to:

- Provide detailed information on the travel habits of Auckland residents including their preferred elements of a destination and the timing of their travel.
- Determine which inducements would be most effective in attracting Auckland residents to a destination during its low season.
- Determine existing perceptions of Northland held by Auckland residents.
- Determine which groupings of Auckland residents were the most and the least seasonal in their domestic travel.
- Determine which areas of Northland were the most and least affected by seasonality in the tourism industry.
- Identify the effects seasonality is having on tourism-based businesses in Northland and the problems it is creating.
- Identify the methods these businesses are currently using to combat these problems.
- Identify the forms of promotion currently being used by Northland's tourism-based

businesses.

- Profile visitors to the Northland region.
- Determine the nature of the experiences of visitors to Northland.

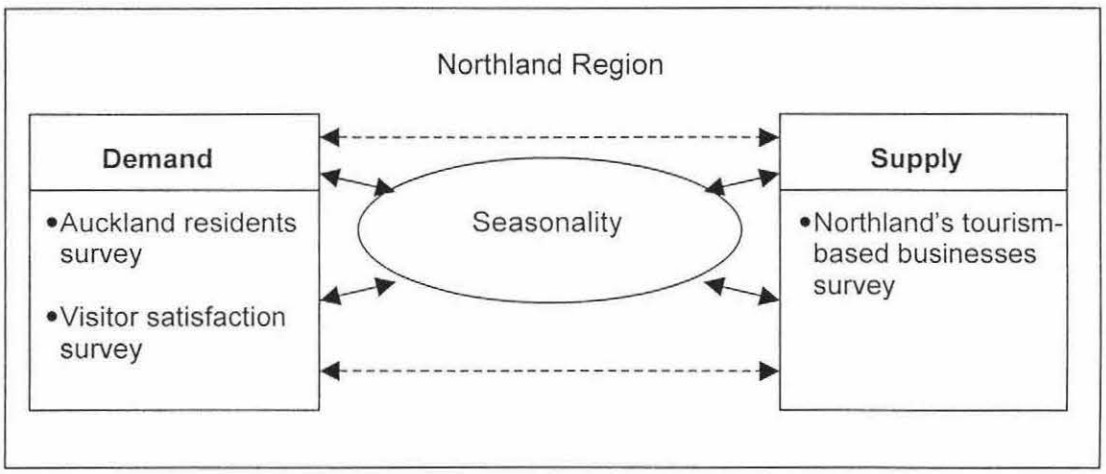
The multi-dimensional approach of this thesis is achieved through the use of three separate surveys which in turn assess:

- The travel patterns and behaviours of Auckland residents
- The effects of seasonality on Northland's tourism-based businesses and their methods of coping, and
- The levels of satisfaction of visitors to Northland.

These surveys combine to produce an image of tourism seasonality as seen from these three viewpoints in the setting of the Northland region. These viewpoints from both the demand and supply sides of the tourism industry aim to produce a rounded, integrated study (see Figure 1). What is not shown in Figure 1 is the management implications for tourism organisations, such as Destination Northland, which are charged with the promotion of the region, and are faced with addressing the dimensions of this problem.

The first survey sampled 548 Auckland residents who are at least 18 years of age. This survey attempts to identify the determinants of the travel patterns and behaviours of Auckland residents as this population is Northland's single largest market. This includes identifying the underlying reasons for seasonality in tourism and which inducements would be most effective in prompting travel to a destination during its low-season. It also examines Auckland residents' perceptions and attitudes to the Northland region as a travel destination and how their travel to the region is affected by seasonality. The second survey is based on 23 tourism-based businesses in Northland and attempts to show how these business are affected by seasonality of demand. It assesses how serious a problem like seasonality is for these businesses and what methods they are currently using to cope with it. It also examines other issues such as the businesses' employment levels according to the season, the various methods of promotion being currently used by the businesses, and the role of their membership of New Zealand's Visitor Information Network in assisting with their business. The third survey examines the perceptions of 534 customers of Northland's tourism-based businesses. This survey attempts to profile the region's visitors and determine how seasonality impacts on their experience of Northland. It addresses such issues as how visitors became aware of the business in which they were questioned, which elements of a business are important to them, and whether they would recommend the business

Figure 1.1: Structure of the study



to friends and relatives. The surveys of Auckland residents and Northland businesses were both postal while the survey of Northland visitors was left at participating businesses for customers to complete. Together these three surveys dovetail to provide a greater understanding of seasonality in the tourism industry and of tourism in Northland. This study examines the causes of tourism seasonality and the effect it can have on the region's tourism industry stakeholders. Specific groupings within the samples are identified including the characteristics of the most and least seasonal travellers particular among Auckland residents and the nature of the Northland tourism-related businesses which are most and least affected by seasonality.

A detailed data analysis was carried out on the data gathered, particularly that from the survey of Auckland residents. Tests performed were:

- Goodness of fit tests to gauge how well the sample represented the population.
- Kruskal-Wallis tests to identify significant differences of opinion between groups in the sample.
- Factor analyses to reduce large numbers of variables to a smaller group that still represent the original variables.
- Cluster analyses to identify groups within the sample according to shared opinions.

The samples for this study were generally of a good size although the survey of Northland businesses may have benefited from a larger sample size. The major limitation of this study is one common to most postal and self-completion surveys. This is that not all members of the selected sample will be equally likely to respond. This is because members of the sample that feel particularly strongly about the issue in question are more likely to want to express their opinions by responding. This can result in some elements of the sample being over-represented. These elements can include respondents of a particular sex, age, income level, race, or viewpoint. This is particularly true of surveys concerning divisive issues. The subject matter of this study lessened the potential for this problem but some effects of it may still have occurred.

This thesis begins with a review of the existing literature concerning seasonality in the tourism industry. The existing literature tends to be quite descriptive in nature since it does not address the actual causes of seasonality or the determinants of the timing of a person's travel. Following this is a review of the Northland region which provides an understanding of the nature of the setting in which this study takes place. The region's tourism industry is discussed including its attractions, visitor markets, and the extent to which marketing focuses on seasonality issues.

2 Literature Review

2.1 Definitions of seasonality

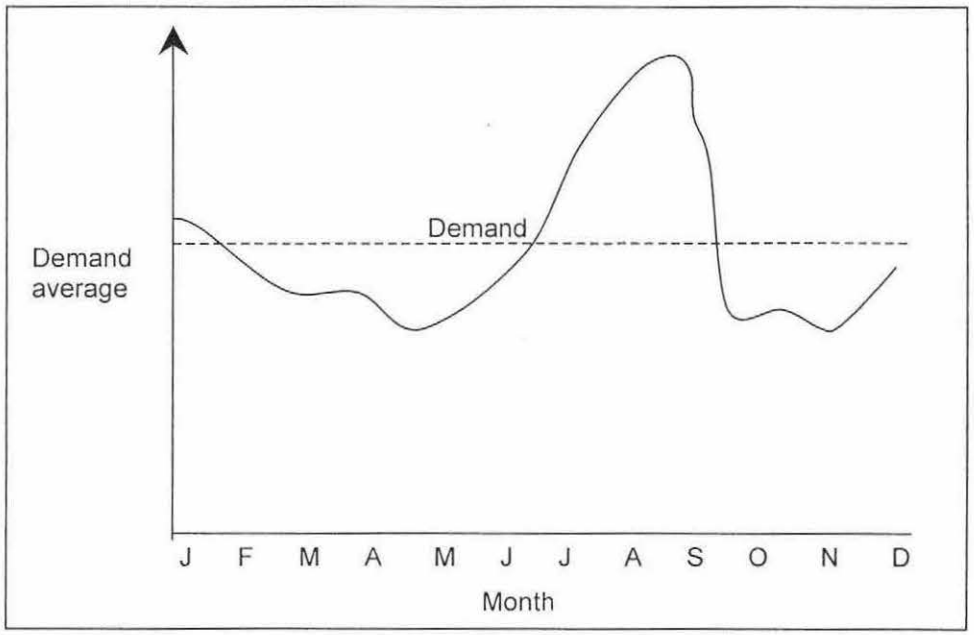
Seasonality is a feature of demand defined in a tourism context as "the peaks and valleys of demand for a destination and its facilities" (Starr, 1997, p.19). These peaks and valleys can occur over a long time period, a short time period (often referred to as periodicity), or relate to one-off events. In general terms, seasonality in tourism is defined as the fluctuations in demand for a destination and its facilities over the calendar year illustrated simply in Figure 2.1 (Allcock 1989; Cooper, Fletcher, Gilbert, and Wanhill 1993; Collier 1994; Anon. 1996).

Figure 2.1 depicts the typical pattern of demand for an area affected by seasonality that has its high season over the months of August and September. It is probable then, that it is either a southern hemisphere area popular in winter or a northern hemisphere area popular in summer. The not uncommon rise in the level of demand during December may be due to travel associated with the Christmas period. The increases seen in March, April and November, may correspond to set public or school holiday periods. This is a simple model of an area with one major peak season. As BarOn (1999, p.3) notes with reference to Israel, however, destinations can be "multi-seasonal". In Israel this is "due to the variety of religious, historic, leisure and other attractions in a relatively small area, the varied markets and the climatic conditions for sight-seeing throughout the year and enjoying winter sun and water sports" (BarOn, 1999, p.3).

Cooper et al (1993) illustrate seasonality with the graph shown in Figure 2.2 and identify two forms of seasonality, additive and multiplicative. In the case of *additive seasonality,* it refers to the addition of demand at certain times of the year to the trend. For example, in August there may be an extra 100,000 visitors, and in February 75,000 fewer, both purely because of the time of year. In contrast, *multiplicative seasonality* refers to the proportional increase or decrease of the trend at certain times of the year. For example, August may be double the trend, whereas February is 40 per cent of the trend, both purely because of the time of year (Cooper et al, 1993, p.69). Cooper et al (1993, p.69) note that "most seasonal demand data in tourism are multiplicative".

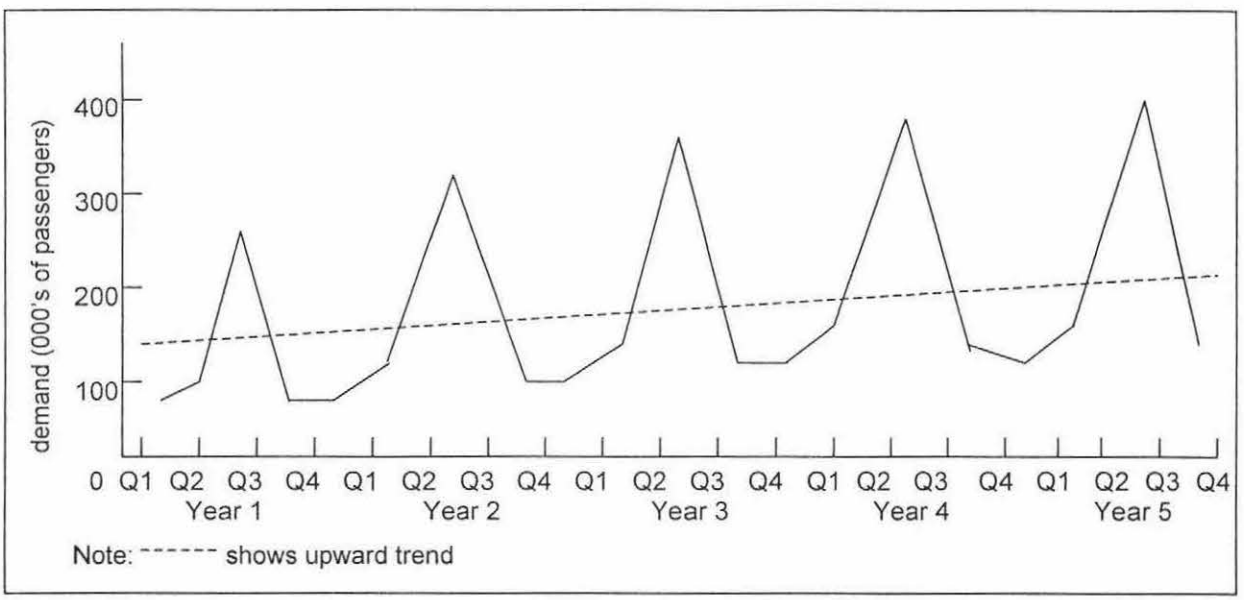
The main factor influencing the pattern of demand that creates seasonality is thought to be, the cycle of the seasons (BarOn 1975, Patmore 1983, Collier 1994, Laws 1995). Weather plays a dominant and seemingly unalterable role in travel decisions: "weather [is] probably...the critical factor in the choice of holiday time and/or destination" (Collier,

Figure 2.1: Seasonality



Source: Cooper et al (1993, p.133).

Figure 2.2: A pattern of seasonal demand (artificial)



Source: Cooper et al (1993, p.69).

1994, p.262). Patmore (1983, p.70) agrees that "one of the most unyielding of constraints is that imposed by climate, most obviously where outdoor activities are concerned. The rhythms of the seasons affect both the hours of daylight available and the extent to which temperatures are conducive to participant comfort outdoors". As a result "a destination which is essentially attractive because of its beaches and hot summers is likely to have a highly seasonal demand. The same applies to demand for holidays at a ski resort which has snow for only part of the year" (Cooper et al, 1993, p.68). It is also accepted that the weather at the traveller's origin region can also be an important consideration. As Stynes and Pigozzi (1983, cited in Allcock, 1994, p.86) recognise, "seasonality may...appear where climate is constant relative to other locations. For example, Hawaii may exhibit 'seasonality' because of the weather in Michigan and other northern states rather than any fluctuations in its own climate".

There is also institutionalised seasonality which restricts travel through non-climatic factors such as "holidays and other events at specific times of the year, e.g. Christmas and the summer vacations of schools, universities and many places of work" (BarOn, 1975, p.2). Regular special events held at a destination can also be influential (Cooper et al 1993, Bull 1995, Laws 1995). BarOn (1999) adds to this list the off-season closing of some facilities, and existing pricing and promotion policies. All of these factors can affect travel patterns to varying degrees.

2.2 Seasonality is not unique to the tourism industry

Bull (1995, p.44) notes that "tourism has one of the most highly seasonal patterns of demand for any product, with less variation than demand for Christmas cards or air conditioners, but more than nearly all high-value individual purchases". It is recognised, of course, that seasonality is by no means unique to the tourism industry (Cooper et al 1993; Collier 1994; Bull 1995). Collier (1994, p.162) notes that many products such as "ice cream, coal and suntan lotion also experience seasonal demand". The tourism industry, however, may be better able than others to lessen its seasonality.

2.3 Seasonality's importance to tourism

Seasonality is an important issue in tourism research for a number of reasons. Firstly, BarOn (1975, p.2) notes that seasonality can affect both the supply and demand sides of the tourism equation: "tourist movements and the resultant activities of the carriers and many other enterprises involved are affected by the seasonality of demand

(holidays in the source countries) and of supply (attraction of destinations and tours)". Seasonality "has long been recognised as one of the most distinctive features of tourism, and...after the movement of people on a temporary basis, may be the most typical characteristic of tourism on a global basis" (Butler, 1994, p.332). Seasonality exists throughout the tourism industry: "most statistical series of arrivals and departures of tourists, bed-nights in accommodation, employment in hotels and other branches of the tourism industry show considerable fluctuations from month to month due to seasonality and other predictable factors" (BarOn, 1975, p.2).

Another reason for seasonality's importance is that "past data suggests that the tourism industry has become increasingly seasonal over the years" (Soesilo and Mings, 1987, p.27). Conlin (1997, p.235), however, points out that "seasonality is a problem in Bermuda, but its pattern has not changed significantly in recent years. It appears worse because all tourism has declined including the shoulder and off-season". Chazaud, Chaspoul, Molinari, Barre and Juyaux (1991) also disagree with Soesilo and Mings and argue that factors such as the growth of short stay tourism, changes in work schedules and the staggering of school holidays all suggest that the seasonal nature of tourism is gradually disappearing. BarOn (1999, p.2) has also seen that "week-end and short holidays have increased" and Barre (1991) speaks of the disappearance of seasonality. Tourism seasonality finds itself in an unusual position, it: "is at the same time one of [the tourism industry's] most widely recognised and least well researched features" (Allcock, 1994, p.86). There has been relatively little detailed research on the phenomenon of seasonality and the means by which the tourism industry can address its effects.

2.4 Potential problems associated with tourism seasonality

While some benefits may be associated with seasonality, it is generally accepted that "seasonality of demand...causes major problems for the tourist industry" (Cooper et al, 1993, p.69). It can cause many serious problems for all of the major stakeholders in tourism activity: tourism operators, tourism employees, local resident, and tourists themselves. Tourism's seasonality-related problems stem from the fact that tourism is a service industry: "it is not possible merely to stockpile the product – a hotel room which is unsold on a particular night, an unsold seat on a flight, or an unsold theatre ticket all have an economic value of zero" (Cooper et al, 1993, p.69).

2.4.1 Problems experienced by tourism operators

Cooper et al (1993, p.132) neatly summarise the economic difficulties caused by seasonality as they relate to any industry, not just to tourism:

> from an economics point of view, any business subject to seasonal fluctuations in demand for its output is faced with a dilemma. If it purchases sufficient resources to meet the peak load demand, it will have to carry spare productive capacity for the remainder of the year. If it gauges its resources according to the average level of demand, it will spend part of the year carrying spare capacity and will be unable to meet the peak load demand level.

These difficulties in planning and operating efficiency are one of the driving elements in trying to obtain a more even pattern of demand. While some tourism operators are willing to accept these seasonal patterns and welcome the approach of their low season, many face significant problems due to seasonality. The problems which seasonality can create for the tourism operator mainly concern cost-spreading; facility use; and staffing. Generally the larger operators agree with Bonn, Furr and Uysal's (1992, p.109) description of tourism seasonality as "perhaps the most pervasive problem confronting...managers of tourism businesses".

There are methods of forecasting demand for a particular region or attraction such as those used by BarOn (1975). Cooper et al (1993) present the following formula for calculating demand D in a particular month:

$$D = T \times S \times R$$

where T is the trend value for that month, S is the seasonal index for that month, and R is a random or unpredictable element. The use of such a formula can produce useful demand forecasts but cannot aid in actually lessening the problem. While seasonality has a much greater effect on "coastal and winter sports resorts than capital city tourism" (Pearce, 1989, p.153) it is still a fortunate tourism operator that does not face at least some of the numerous problems associated with seasonality. However, Pearce (1989) may not adequately recognise the climatic effects of seasonality on urban destinations and few studies of cities have adequately discussed seasonality effects (Page 1995). In fact Page's (1999) study of Auckland highlighted seasonal demand issues associated with accommodation usage but even this is a limited analysis of a complex issue in an urban context.

2.4.1.1 Cost-spreading

Cost-spreading while experiencing seasonality is one of the major issues facing tourism operators (Cooper et al 1993; Collier, 1994). Anon. (1996, p.207) states that "leisure and tourism organisations need to be aware of the seasonal variations in their income, and plan how to counteract them". Figure 2.3 depicts a typical pattern of income for a leisure or tourism operator. This constant variation in income can create a certain instability within the operation. Developing a more even pattern of income would relieve the financial pressures on operators but this is not easy to develop.

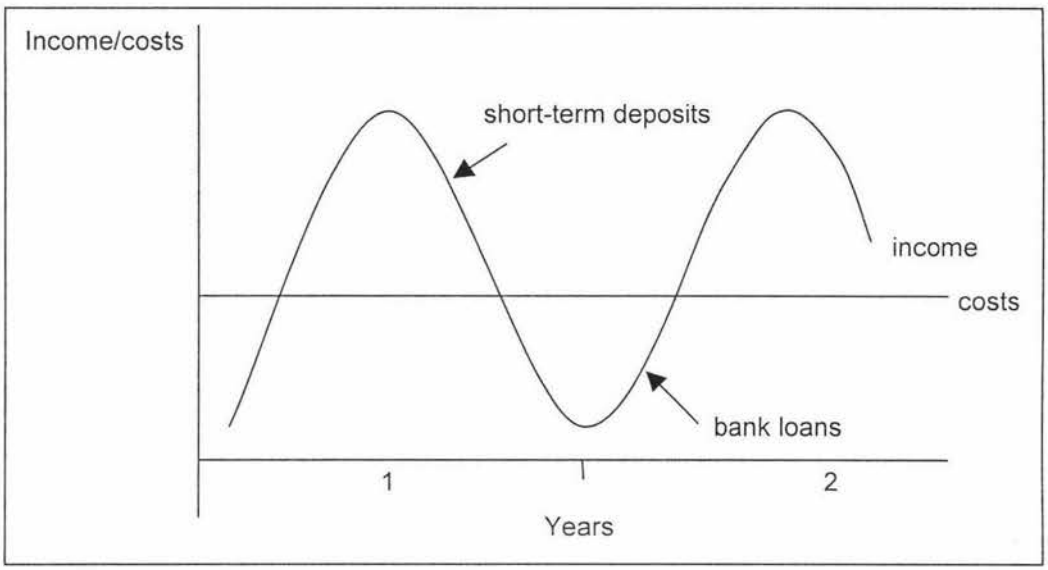
2.4.1.2 Facility use

The problems caused by seasonality with regard to the use of a tourism operation's facilities are also very serious and may be a restricting factor to entering the industry. BarOn (1999, p.1) recognises the magnitude of seasonal facility use, arguing "the economic benefits of tourism are reduced by building accommodation and facilities used only part-year". Craik (1991, p.62) notes that the tourism industry regards seasonal peaking as "'inefficient' because it ties up capital, requires a casual labour force, strains services (such as the transportation system, including traffic congestion and accidents), and alienates residents". Allcock (1994, p.87), citing Manning and Powers, agrees that "uneven distribution of use over time...is one of the most pervasive problems in outdoor recreation and tourism, causing inefficient resource use, loss of profit potential, strain on social and ecological carrying capacities, and administrative scheduling difficulties". McEniff (1992) however, identifies the under-utilisation of resources due to seasonality as a major difficulty for the tourism industry. Leasing out idle equipment during the low season is one way to deal with this problem. This is done very successfully by the United Kingdom's charter airline Air 2000 which in its early years made efficient use of its equipment by leasing one of its two 757 planes to British Airways during its low winter season (Laws, 1991). This practice has also been employed by the ferry industry, relocating vessels to sources of demand according to seasonal requirements in Europe.

2.4.1.3 Staffing

Employment that has a seasonal basis can create many problems for tourism operators. It can be difficult to retain good staff and costly to keep training new intakes of employees, possibly on a yearly basis. Mill and Morrison (1985, p.231) note that "to ensure a balance between market demand and staff requirements, a business tends to adopt one of two strategies. Either employees are laid off over the low season, or

Figure 2.3: Seasonal cash flow management



Source: Bull (1995, p.232).

additional employees are imported from other regions during the high season". In the former situation "workers employed...for part of the year may have no opportunities for employment during the rest of the year" (Witt et al, 1991, p.41). For some workers (such as students) this may either be the desired situation, or the transition does not cause any problems. Many, especially in poorer areas, are not so fortunate and this seasonal unemployment can become a major problem. In some areas those unemployed in the low season try to return to traditional employment which can create social stresses in their community. If returning to traditional work is not an option then societies may find their crime rates increasing as the seasonally unemployed try to survive over the low season.

Importing employees from other areas to work over the high season can generate its own set of problems. It necessitates - either at the expense of the business involved, the local government, or both - the supplying of accommodation for these imported employees for the duration of their stay. If housing is built especially for them then this accommodation is then empty in the low season. A further problem with this situation is that when these employees return to their home region in the low season they take their wages with them. This means that the region that has supported them over the high season then loses this potential income right when it needs it the most, reflected in the high leakage of tourism income from rural areas and low tourism multipliers (Page and Getz, 1997).

In some areas the local government will attempt to counteract the problems associated with seasonal unemployment. Van Harssel (1994, p.192) illustrates this point with the current situation in Turkey. There the government sees to it that "credit facilities are made available to enable otherwise unemployed workers to make handicrafts during the winter months and pay their debts when their goods are sold during the summer tourist season". This unwanted seasonal unemployment can be seen as seasonality's most significant issue due to its consequences for managers, employees, the local society, and travelers.

A major management problem due to seasonal employment is the "inherent waste in taking on staff...on a temporary basis, investing in human resources (by training) and then losing that investment at the end of the main season" (Cooper et al, 1993, p.133). Related to this, employing workers on a seasonal basis "inhibits training and career progress" (Witt et al, 1991, p.41). This can make it difficult for managers to attract and retain high-calibre staff. Travelers can then be negatively affected when they have to deal with theses poorly trained and inexperienced staff. A bad experience at this level

endangers the traveler's entire impression of their holiday through the 'halo effect'. If this then turns into bad word of mouth it can feed back as a further employment-related problem for managers.

2.4.2 Problems for seasonal employees

Seasonality affects many of the tourism industry's employees. Saleem (1992) recognises that a significant proportion of jobs in the tourism industry are seasonal in nature and that this means that seasonality is a serious problem in tourism employment. Workers engaged in seasonal tourism employment have various problems to deal with: "workers employed in the tourism industry for part of the year may have no opportunities for employment during the rest of the year, and this may cause resentment among employees. In addition, the seasonal nature of employment inhibits training and career progress" (Witt, Brooke and Buckley, 1991, p.41). The French government recognised the problems experienced by seasonal employees and in 1992 it was implementing the 'European Seasonal Employment Instability Benefit'. This benefit has been described as one way of addressing the issue of seasonal employment (Saleem 1992).

Some workers (such as students and the retired), however, seek out seasonal employment for the benefits they obtain from it (suitable hours, long stretches of 'leave'). Indeed Ball (1988) notes that this seeking out of seasonal work is more common than usually recognised. Ball (1988) also recognises that even those workers that would prefer not to just have seasonal employment may benefit from simply experiencing a departure from a government benefit.

2.4.3 Problems for local residents and the local environment

Local residents of areas that that are prone to seasonal demand patterns have their own set of problems to deal with. These include overcrowding, price rises for goods such as groceries, strained local services "such as the transportation system, including traffic congestion and accidents" (Craik, 1991, p.62), and at times a general sense of frustration that their community is being overrun by tourists. At these times it can be difficult for them to remember the positive outcomes of tourism for their community. If local residents are then hostile towards tourists for these reasons then the tourists' positive impressions of the area may be diminished and negative publicity may be the result. A further problem for local residents is the issue of crime. An area bustling with wealthy tourists is a perfect place for petty crime such as pick-pocketing to flourish. In

the low season, as discussed earlier, unemployed seasonal workers may have to turn to crime to survive.

Seasonal demand patterns can also have consequences for an area's natural environment. The environment of a seasonal location that is inundated with visitors in its high season will be put under a great deal of stress over this period. This stress may appear as overuse, or forms of pollution such as litter and air pollution. A popular summer hiking or bush-walking area, for example, can suffer chronically high levels of trampling, associated soil compaction, litter, and the air pollution produced by the vehicles used to get to the site. Damage occurring at high levels over a short period can be harder for an area to deal with than moderate damage over a longer period. While seasonality means that a damaged area has the low season to recuperate, this period may not prove long enough.

If a tourist area is particularly prone to seasonality then it can also be at increased risk from "unpredictable and disruptive events including natural disasters...and political violence such as coups and terrorism" (Craik, 1991, p.63). It is much more important for an area that has its demand concentrated into only a few months of the year to have good conditions during that time than it is for a year-round attraction to have good conditions over any particular period. From a natural disaster viewpoint, this was demonstrated when Mt. Ruapehu erupted recently. The winter eruptions could not have come at a worse time for the many skiing-related operators in the area who tighten their belts over the summer months waiting for their profitable winter seasons. These businesses now had to cope with what were, in effect, the three consecutive low seasons of summer, ruined winter, then summer again. The risk posed by political unrest was illustrated in equally dramatic fashion in 1987 when Fiji "suffered a drop in tourist numbers of 30 to 50 percent following the two coups" (Craik, 1991, p.63). This vulnerability to unpredictable disruptions is another important reason for tourism operators to try to even out demand over the entire year.

2.4.4 Problems for the tourist

The many problems seasonality can pose for the traveler can also translate into problems for the tourism operator. Many travellers are forced to travel in the destination's high season, Bull (1995, p.20) notes that "most recreational or holiday tourism is constrained by school vacations or place of work holiday entitlements, together with climatic conditions producing strong seasonal variations". Bull (1995, p.20) also states that "various pieces of research have indicated that VFR traffic and

luxury recreational tourism are perhaps the least sensitive to demand variation". This is at odds with Page and Forer (1998a, p.297) who note that this market is "variable and highly seasonal". They also view this market as being "extremely price sensitive and adversely affected by poor weather conditions" (Page and Forer, 1998a, p.297).

The main problem created for the tourist may be the overcrowding that can occur at popular destinations during the high season. The effects of this can be price rises for basic needs from transport and accommodation to groceries, hostility from the local residents under siege, and poor treatment from the aforementioned seasonal workers. Overcrowding can also result in a rise in an area's crime rate, much of which may be directed towards the tourists. All of these factors can contribute to lowering the traveller's general enjoyment of their holiday. This lowering of enjoyment is another reason for tourism managers to want to find ways of lessening the effects of seasonality. If the traveller returns home dissatisfied the negative word-of-mouth generated can hurt the reputation of the destination and the operators involved.

Significantly, wealthier travelers (which might be thought to be more demanding) are not as restricted in terms of the time period they choose to travel in. This is because they are able to afford measures that will lessen the negative aspects of their chosen destination in whichever season they are there. This can take the form of such things as air conditioning or heating to counteract adverse climatic conditions in the low season (Pearce 1989), or high quality accommodation to avoid overcrowding in the high season.

2.5 Responses to seasonality problems

Current management responses to the problems of seasonality are based on lessening its impacts on three main areas: employment, facilities, and costs. Currently, according to the literature, managers are having mixed success. Witt et al. (1991, p.42) attribute this to the fact that "the prime importance attached to the weather by many holidaymakers means that only a certain amount of flexibility is possible". Bull (1995, p.44) also notes that "given that seasonality is largely institutionalised or directly affects major characteristics of the product (to do with climate), many bounds on demand are not variable by price or marketing inducements". Witt et al (1991, p.41) also state that "there are four principal strategies for managing seasonality: changing the product-mix, market diversification, differential pricing and encouragement/facilitation by the state of the staggering of holidays". The most commonly used of these strategies would appear to be changing the product-mix and the implementation of a differential pricing

scheme.

2.5.1 The product mix

Changing the product-mix means introducing new attractions to existing destinations. These attractions can be features of the destination itself in a different season (such as the promotion of summer nature walks in areas that in winter are home to ski resorts), or the creation of new attractions or events (Witt et al (1991,p.41) give the example of "a summer beach resort [setting] out to attract the conference trade in the off-season"). Changing the product-mix can be used as described above to increase visitation in the low season, or it can be used to extend the high season just as the Queenstown festival extends that area's high winter season.

2.5.2 Market diversification

The concept of market diversification is separate from, yet related to, changing the product-mix. It is about attracting different segments of the market to an existing destination. BarOn (1999, p.2) sees potential in this approach as "market segments have different seasonality and varied responses to price and other incentives". BarOn (1999, p.2) further notes that "changes may occur [in a destination's seasonality] over the years, due to [unprompted] differential growth of market segments with different seasonality". Witt et al (1991, p.42) describe the attempt at market diversification carried out on Florida as a tourism destination. "North Americans...have been travelling to Florida for winter holidays for some considerable time...More recently, however, Florida has been marketed as a *summer* destination to UK residents, and the British have travelled there in increasing numbers".

Making a destination or attraction visible to market segments other than the traditional ones can greatly reduce the effects of seasonality. The new market segment to be targeted need not be based on the nationality of visitors; demographic features can be used just as successfully. Cooper et al (1993, p.69) suggest carefully targetting marketing to reduce seasonality: "Marketing may be targeted at groups which have the time and resources to travel at any time of year, notably the elderly. They illustrate the point with the example of Michigan. This state is popular with younger visitors in the summer season and can be promoted to older visitors in the autumn to view the changing colours of the area's foliage. Cooper et al (1993, p.69) recognise the need to "create or shift demand to the shoulder or trough months, either through setting price differentials or through the introduction or enhancement of all-year facilities".

2.5.3 Pricing

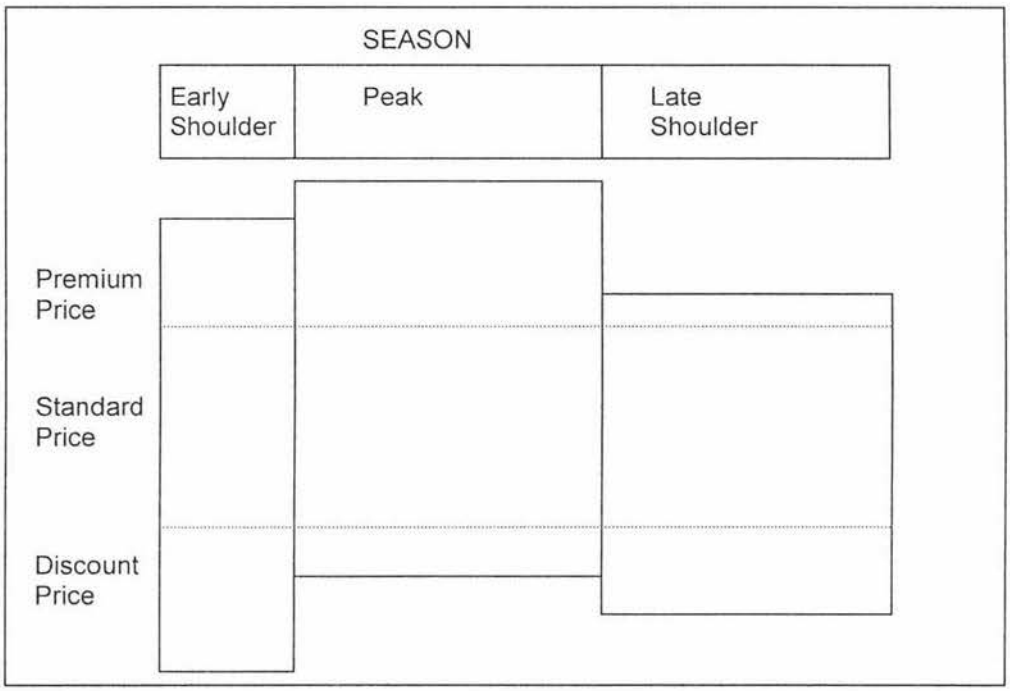
Differential pricing schemes are perhaps the most widely used way of attempting to even out annual visitation figures (Witt, Brooke and Buckley 1991; McEniff 1992; Cooper et al 1993; Anon. 1996). They can be used in two ways: to encourage travel in the low season, and to discourage travel in the high season. For example, a tourist resort can lower its prices in the low season to encourage travellers who would usually travel at other times of the year, and it can raise its prices in the high season as a form of de-marketing to try to discourage visitors and therefore to reduce overcrowding (Witt et al, 1991). Many travellers are by now familiar with the concept of seasonal price banding as illustrated in Figure 2.4.

Figure 2.4 shows the proportion of each type of ticket available in each of the three time periods. It shows that a much greater proportion of peak season tickets are premium price tickets compared to the other two seasons. Similarly the bulk of the discount tickets are available in the shoulder seasons ("the period between high and low seasons" (Starr, 1997, p.19) to try and lengthen the high season by encouraging travel at this time. Pricing structures such as this are usually associated with transport (particularly airline tickets) and accommodation rates. Anon. (1996, p.207) quotes a tour operator to show another important consideration of these price structures: "like most holiday companies, we sell most of our holidays during the summer. As we have to cover our expenses throughout the year, we offer low cost and discounted holidays during the quiet, winter months. These special offers – loss leaders – might not even make a profit, but they ensure that the market is still aware of our name".

Seasonal demand affects price as illustrated in Figure 2.5. As with any standard situation of supply and demand, an increase in demand leads directly to an increase in price for, in this case, admission to an attraction. Low prices in the off season can be used to attract just as high prices in the high season can become a form of rationing (Bull, 1995). Used together, these strategies can help to even out demand.

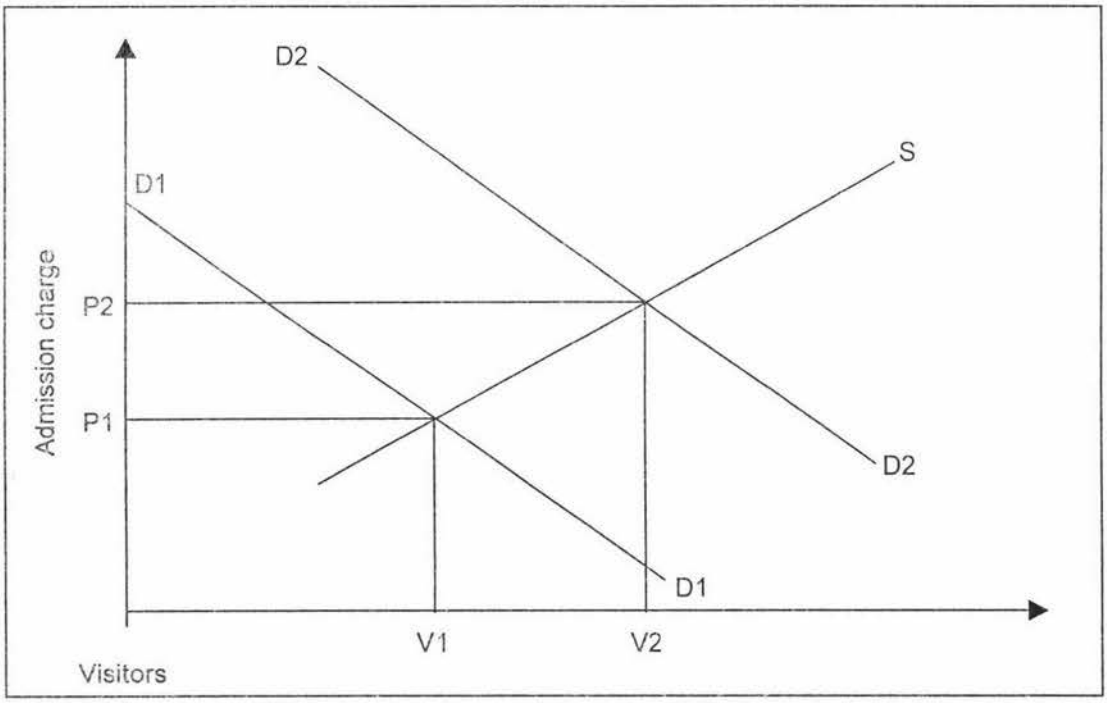
Cooper et al (1993) however, note that discounting over the low season has limitations. The operator must both cover their costs and be careful not to lower the desirability of the main season product. This latter point is important to operators using price as an encouragement. An exclusive hotel, for example, that charges several hundred dollars a night in normal trading cannot offer the same room for $50 a night in the low season. Its normal-trading clientele may feel the hotel has lost its exclusivity and be reluctant to use the hotel in the high season. This operator must find the balance between remaining

Figure 2.4: Seasonal price banding for inclusive holidays.



Source: Laws (1997, p.168).

Figure 2.5: Seasonal demand



Source: Cooper et al (1993, p.215).

exclusive for its normal-trading clientele and attracting low-season visitors.

2.5.4 Other

There is one method of trying to break the fluctuating demand pattern of seasonality that is out of the direct control of operators. This is the altering of traditional set holiday periods. This state-initiated measure can take the form of "the staggering of school summer holidays over a longer period and the encouragement of the staggering of industrial holidays" (Witt, 1991, p.42). McEniff (1992) recognises school and work holidays as the main determinants of seasonality and notes that their staggering is one of the key methods in creating a more even pattern of demand. Staggering these holidays can help to lessen the effects of seasonal demand by lengthening the high season or by increasing demand at times of the year that it would otherwise be relatively low. This can help to reduce overcrowding in the high season and increase visitation in the low or shoulder seasons thereby lessening the problems associated with seasonal demand.

Some tourism operators find it easier to simply close down over the low season. While this is "attractive to many semi-retired and amateur owners who themselves [wish] to take lengthy holidays after the peak season" (Laws, 1995, p.18), it can jeopardise the long-term viability of an operation. A business that shuts down in the low season in this way is unlikely to "generate sufficient cash flow to invest in improvements to their facilities from season to season, and eventually they risk losing business to more adaptable destinations" (Laws, 1995, p.18). It would seem to be a better strategy to attempt to deal with seasonality's problems rather than just trying to ignore them in this way. It is also evident that "the costs and dangers, including marketing dangers of congestion at peaks, and the loss of profitability in the low...period make the seasonal aspect one of the most important fields for common action by government and the private sector as well as by the individual operator" (Quest, 1990, p.110).

Locations are finding their own ways of dealing with the effects of seasonality in addition to these four strategies above. Turkey and Morocco, for example, "have placed a high priority on tourism development through government-funded hotel facilities and massive advertising campaigns to stimulate 'second' season interest and occupancy" (van Harssel, 1994, p.192). This approach does not seem as promising as those already noted as it is neither attracting new market segments nor offering existing ones anything new. Many locations, however, do not have such levels of positive government intervention in the tourism industry. It is obviously hoped

levels of positive government intervention in the tourism industry. It is obviously hoped that these actions will in some way reduce the negative effects of seasonality but further understanding of the issue may be necessary.

2.6 Positive aspects of seasonality

Despite the many negatives associated with seasonality, many benefits have also been identified. Seasonal demand can be seen as a benefit, if not a necessity, to a destination's natural environment (Saleem 1992). An area that is heavily used in the peak season (a beach, a national park) must have time to recover from this impact. This view was first articulated by Hartmann (1986, cited in Allcock, 1994, p.88) where "...dead seasons are the only chance for a social and ecological environment to recover fully. A dormant period for the host environment is simply a necessity in order to preserve its identity". Murphy (1985, p.81, cited in Butler, 1994, p.334) states that in some communities the end of the tourist season is seen as "the light at the end of the tunnel". Butler (1994, p.334) also cites Murphy's (1985) assertion that "individuals need release from stress and that some populations would not be capable or at least content to experience the stress of catering for tourists throughout the year". Jordan (1980, cited in Mathieson and Wall, 1982, p.142) believes that: "[residents] view the approaching [high] season with mixed feelings, and value the off season when only permanent residents are present".

Seasonal employment is an area in which some positive points are recognised. Laws (1995, p.18) notes that "traditional British seaside guest houses used to close... for several months in the winter. This seasonal feature of the business was attractive to many semi-retired and amateur owners who themselves wished to take lengthy holidays after the peak season". Laws (1995, p.18) continues to identify a flaw in this scenario: "the long-term viability of seasonal destinations is jeopardised, because they are unlikely to generate sufficient cash flow to invest in improvements to their facilities from season to season, and eventually they risk losing business to more adaptable destinations". Mourdoukoutas (1988, cited in Allcock, 1994, p.88) who, in his study of seasonal employment in the Greek Islands, found that it is misleading to always view unemployment in the off-season as involuntary and seasonal workers as victims. He found that "some *employees* choose seasonal *occupations* because they pay more. Others do so because seasonal occupations suit their non-market activities during their off-peak season(s), or they may lack any other occupational alternatives". Allcock (1994, p.90) summarises this view very well:

> It cannot be taken for granted, however, that the seasonal shape of tourism is necessarily and everywhere experienced as a problem to be tackled and if possible eliminated. It may be important to acknowledge that because of the characteristics of the local ecology, other sectors of the local economy, or patterns of social life, that a 'fallow' period in the year is not only welcome but indeed is vital for the capacity of the community to sustain other activities which it regards as essential. In such cases the cost to individual tourism enterprises which are compelled to work below their optimum capacity or level of profitability may be offset against wider measures of benefit, both economic and non-economic.

As with so many things, the issue of seasonality is not a clear cut issue in tourism research, and much of the existing research is based on long held assumptions about the principal factors influencing seasonality.

2.7 Summary

The fluctuating pattern of demand known as seasonality is currently presenting significant problems for tourism although it is recognised that seasonality is not unique to this industry. The importance of the issue of seasonality to the tourism industry is such that it has been described as "perhaps the most pervasive problem confronting...managers of tourism businesses" (Bonn et al, 1992, p.109). The current management responses are having some success but they will need to do more to lessen the impact of seasonality on vulnerable businesses.

The four main groups of stakeholders affected by seasonality in the tourism industry are tourism managers, tourism employees, residents of seasonal destinations, and the travelers themselves. Seasonal demand patterns generate different problems for each of these groups. The main ways operators are dealing with the negative effects of seasonality are to change the product-mix, to attempt market diversification, and to develop differential pricing structures. The state can ease the situation by staggering school holiday periods and encouraging industry to do the same. These approaches are currently having limited success.

It should be remembered though, that seasonality is not always a negative situation. There are important benefits to the destination's environment, workers, and society. Allcock (1994) reminds us that the benefits of seasonality experienced by these groups must be weighed against the problems it creates for tourism operators. While the negative effects of seasonality can generally be lessened, it seems unlikely that seasonality will ever be totally removed from the tourism industry (McEniff 1992). The

current literature pertaining to seasonality is generally quite weak and further research is needed to gain a better understanding of the issue. The factors that determine seasonality need to be studied as "the understanding of these factors is important for all responsible for tourism" (BarOn, 1975, p.2). Further research into lessening the effects of seasonal tourism demand should be encouraged as it is possible that advances made here may be beneficial to other areas of business.

3 Review of the Northland Region

3.1 Geography and attractions

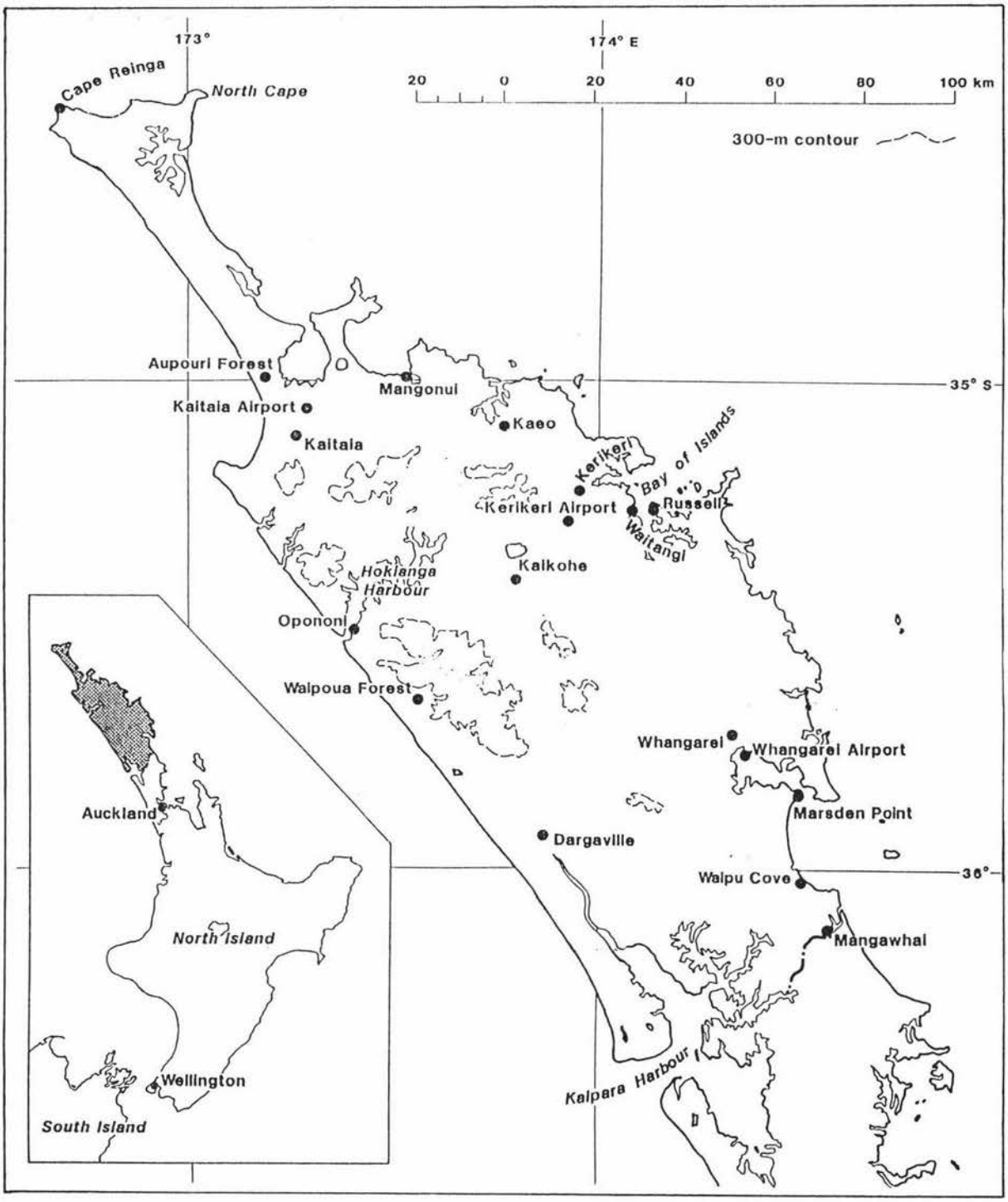
The Northland region covers approximately 12,600 square kilometres and is located in the most northerly region of New Zealand (see Map 3.1) and contains some of the country's most beautiful scenery. It is "predominantly a rural region with a number of small towns and resort areas" (Page and Forer, 1998b, p.367). Northland's population at the time of the 1996 New Zealand Census of Population and Dwellings was 137,052 (Statistics New Zealand, 1997, p.59). The region is steeped in much of the country's early history and features a great number of historic sites and attractions. The "earliest European settlers were whalers and sealers, then traders for flax, timber, kauri gum and food; then missionaries; and finally, farmers, businessmen and central government" (AA Guides, 1998, p.4).

Northland's largest town and port is Whangarei with a 1996 population of 47,400 (Statistics New Zealand, 1997, p.16). Other major settlements are Kerikeri, Dargaville, Kaikohe, Kaitaia and Paihia. To promote visitor activities, Northland has six Visitor Information Centres located at Kaitaia, Omapere, Dargaville, Whangarei, Kaikohe, and Paihia. The Bay of Islands, based around Paihia and Russell, is: "the longest established, most developed and best known tourism area in the region" (New Zealand Tourism Board (NZTB), 1996, p.24). Near Paihia is the nationally important historic site of Waitangi, focus of annual Waitangi Day celebrations. Northland is promoted primarily as an outdoors destination that is "sparsely populated, being mainly rolling farmland fringed with spectacular bays and beaches" (AA Guides, 1998, p.4). Emphasis is placed on the region's coastal attractions: "much of Northland's hundreds of miles of coastline remain unspoilt – an aquatic paradise for water sports, including windsurfing, sailing, kayaking, diving and some of the world's finest big game fishing" (AA Guides, 1998, p.4). Other outdoor activities and historic attractions are also promoted: "there are many historical sites to visit and an extensive network of walking tracks. Horse treks, scenic and charter flights, 4-wheel drive trips, golf, and arts and crafts are among other visitor attractions" (AA Guides, 1998, p.4). Focusing on the outdoors can have negative effects if potential visitors are unaware of alternative activities suitable for the low season.

3.2 Society and Industry

Northland is generally regarded as one of New Zealand's economically poor regions

Map 3.1: The Northland region



Source: Moir, Cullen and Thompson (1986, p.2).

and at the 1996 Census its unemployment rate was 10.8%, the second highest of the country's sixteen regions.

The region's main industries, besides tourism, are "forestry, dairying, dry stock farming, sub-tropical horticulture, fishing, marine construction, oil refining, and cement manufacture" (Official Visitors Guide, 1998, p.6). Northland's "dairy processing has rationalised to three major processing sites at Maungaturoto, Dargaville and Kauri, plus a few boutique cheesemakers" (Official Visitors Guide, 1998, p.6). In the marine industry, Whangarei and the Bay of Islands "are renowned throughout the Pacific as attractive havens for yachts and other small craft to spruce up. In Whangarei...tuna boats, tugs and other small vessels refit, and modules for the ANZAC frigates are also being built" (Official Visitors Guide, 1998, p.6).

3.3 Tourism in New Zealand

Tourism in New Zealand has been "expanding at a constant rate during the 1980s and 1990s, with 1,541,136 international arrivals to the year ended June 1997 which generated $3.5 billion for the national economy" (Page, Forer and Lawton, 1998, p.13). It is estimated that the tourism industry "accounts for one in 12 jobs" (Middlebrook, 1999, p.1) and in the 1990s is estimated to be worth $10 billion a year to the New Zealand economy (Page and Hall 1999). In a country with a population of only "approximately 3.5 million people, tourism has become a conspicuous and influential force in the lives of many people" (Lawson, Williams, Young and Cossens, 1998, p.247). Unfortunately, information on New Zealand's domestic tourism market is not so readily available due to a lack of data. Tourism Auckland's chief executive, Lance Bickford recognises the lack of research in the industry and believes that New Zealand's tourism "industry struggles because of insufficient market intelligence" (Middlebrook, 1999, p.1). Mr Bickford states that "[the industry must] still battle with the quality and coverage of research monitors in New Zealand" (Middlebrook, 1999, p.1). It is an estimate then, that while international tourism contributed more than "$3.7 billion to the year ended September", domestic tourism contributes "at least $4.8 billion to the economy" (Middlebrook, 1999, p.1). It has been recognised that "tourism is one of the most efficient, external exchange earners when viewed on either a national or regional scale" (Northland United Council, 1983, p.35).

3.4 Tourism in Northland

Northland is "promoted with a focus on sunshine and outdoor coastal activities" (NZTB,

1996, p.1). While this makes the region very popular in the summer, such a narrow scope of promotion can serve to worsen Northland's seasonality problems. Northland's accommodation sector is amongst the most seasonal in New Zealand (Page and Forer, 1998a, p.307). Page and Forer (1998a, p.309) found that the largest single category of attractions in Northland are those that are 'sea based' and they account for 13.6 % of all attractions.

Northland does not account for a large share of New Zealand tourism. In 1988, tourism in Northland made up only approximately "6.5% of total New Zealand visits" (New Zealand Tourist and Publicity Department (NZTP), 1988, p.7) and in 1997 the Northland region was recorded as containing 11.6% of the nation's accommodation bed capacity (Page and Forer, 1998a). The tourism industry, however, is extremely important for the Northland region (Page and Hall 1999). International visitors account for approximately 20% of visitors to Northland (NZTB, 1996, p.1). Domestic tourism market is of major importance to the region and "approximately 80% of domestic visitors to Northland are sourced from Auckland. At least 95% of domestic visitors can be sourced to the top half of the North Island (NZTB, 1996, p.20). Despite this there is little reliable data available on the domestic market, despite its importance to many areas of Northland (NZTB 1996, Page and Forer 1998). Page and Forer (1998a) go on to state that "in the Northland region, no major academic piece of tourism research has been published despite the region's proximity to one of the principal gateways to New Zealand – Auckland" (p.439).

Although the NZTB stated that 80% of Northland's domestic visitors originated in Auckland, Page and Forer (1998a) put that figure at 52%. The Visitor Satisfaction Survey in this study found that 46% of Northland's domestic visitors are sourced from Auckland. Whatever the exact figure, the importance of the Auckland region to Northland's tourism industry is clear (see Table 3.1). An interesting comparison can also be made between the main purpose for travelling to Northland in 1988 and 1999 (see Table 3.1). The reasons for travelling to Northland have remained relatively constant except for an increase in business travel.

Lawson et al (1998) recently examined the differing attitudes towards tourism held by the residents of various New Zealand towns. They made many interesting discoveries concerning the attitudes of Whangarei residents compared to those held by other parts of the country. They found that Whangarei residents were more likely to disagree that tourism had inflated the cost of living within their community. Whangarei residents

Table 3.1: Comparison of the origins of Northland's domestic tourism market 1988, with author's 1999 research

Region 1988	%	1999	%
Auckland	52	Auckland	46
Northland	28	Northland	28
Bay of Plenty	6	Bay of Plenty	5
South Island	4	South Island	2
Taranaki	2	Taranaki	3
Wellington	1	Wellington	6
Purpose of visit			
1988	%	1999	%
Leisure	48	Holiday	50
VFR	31	VFR	25
Business	8	Business	12
Sport	3	Sport	5
Other	10	Special event	8
Locations visited			
1988	%	1999	%
Whangarei	19	Whangarei	13
Dargaville	4	Dargaville	9
Bay of Islands	19	Bay of Islands	12
Kerikeri	5	Kerikeri	12

Sources: Page et al (1998a, p.298), author's research

Table 3.2: Location and Type of Events: 1996 (ranked by number of events)

Region	Sport	Comm	Art	Garden	Trade	Food	Other	Total
Canterbury	14	5	10	2	0	0	3	34
Auckland	17	1	3	1	1	0	2	25
Bay of Plenty	19	3	1	1	0	0	1	25
Otago	14	2	2	1	2	1	3	25
Waikato	17	1	1	1	1	0	2	23
Wellington	9	3	2	1	1	5	2	23
Taranaki	10	1	3	1	0	0	1	16
Hawkes Bay	6	0	1	1	0	2	4	14
Southland	8	1	1	0	1	1	1	13
Northland	*7*	*0*	*2*	*0*	*0*	*1*	*0*	*10*
Manawatu-Wanganui	6	2	1	0	0	0	0	9
Nelson	2	0	2	1	0	3	0	8
Gisborne	2	1	0	0	1	0	0	4
Westland	2	0	0	0	0	2	0	4
Total	**133**	**20**	**29**	**10**	**7**	**15**	**19**	**233**

Source: adapted from Ryan, Smee, Murphy and Getz (1998, p.75).

were more likely to be concerned that more of the returns from foreign investment in tourism developments were not being retained in New Zealand. Whangarei residents were less certain that tourism has helped to create jobs in the area but were more likely to be happy with the pay and working conditions of the jobs it had created. Whangarei residents were the most likely to agree that "tourism had helped to raise the standards of service available from businesses" in the town (Lawson et al, 1998, p.252). Interestingly, Whangarei residents "indicated [a] slight disagreement that the current provisions for tourism were satisfactory" (Lawson et al, 1998, p.252). Whangarei residents were also more likely to agree that tourism was exploiting Maori. This result was not linked to ethnic background.

Perhaps most significant were the views held by Whangarei residents in relation to the contribution of tourists to the area. It was found that Whangarei residents were slightly less likely to "notice tourists who are visiting their community" (Lawson et al, 1998, p.253). It was then found that Whangarei residents were the most likely of any centre to avoid "places with lots of tourists" (Lawson et al, 1998, p.253). Lawson et al (1998) go on to note that this finding accorded well "with sentiments expressed in the focus group interview conducted in the town. Some members of that group were quite definite that they preferred package tour...arrangements which maximised the revenue from tourism into their town while minimising the amount of contact and change to the routines of most residents" (Lawson et al, 1998, p.253). It was also found that Whangarei residents were particularly willing to "see more tourists" (Lawson et al, 1998, p.254). The attitudes of the host population towards tourism should be monitored as they can play an important role in the development and success of tourism ventures. It also indicates that the region's population recognise the dependence on tourism as an economic base.

3.4.1 Special events

Special events can form a useful basis to assist in developing the profile and activities for an area's tourism industry. Special events can lengthen the peak season of a popular destination (Queenstown winter festival) or encourage tourism to an under-visited region (Hokitika Wild Food Festival). Table 3.2 outlines New Zealand's special events by region in 1996. It can be seen that at this time Northland was basing its special events around sport. This may need to be reviewed given the subsequent changes to tourism in the region (see Table 3.1). There was a distinct lack of commercial, garden, and food-based events in Northland. Table 3.3 shows the seasonal distribution of the country's special events in New Zealand in 1998. It is

Table 3.3: Events by location and month.

Location	J	F	M	A	M	J	J	A	S	O	N	D	Total
Auckland	2	1	1	1	2	0	1	0	1	1	3	5	18
Bay of Plenty	3	2	1	2	0	0	1	3	1	1	1	3	18
Canterbury	2	7	0	1	1	1	1	6	1	0	2	3	25
Gisborne	0	0	0	0	0	0	0	0	0	0	0	2	2
Hawkes Bay	1	3	0	1	0	0	0	0	1	2	0	0	8
Manawatu-Wanganui	1	1	0	1	0	0	0	1	0	1	0	0	5
Nelson	0	0	0	0	0	0	0	1	1	1	0	1	4
Northland	*2*	*1*	*1*	*0*	*1*	*0*	*0*	*1*	*1*	*0*	*0*	*0*	*7*
Otago	4	2	1	4	1	1	0	2	1	3	5	0	24
Southland	4	1	0	0	1	1	0	0	0	2	1	1	11
Taranaki	0	1	1	1	1	1	1	1	0	2	2	1	12
Waikato	0	4	1	1	0	2	0	2	1	2	2	3	18
Wellington	1	7	1	1	0	0	1	0	0	1	2	2	16
Westland	0	1	1	0	0	0	0	0	0	0	1	0	3
Total	**20**	**31**	**8**	**13**	**7**	**6**	**5**	**17**	**8**	**16**	**19**	**21**	**171**

Source: Ryan et al (1998, p.77).

Table 3.4: Average number of visitors per event per region, 1998

Region	visitors per event
Auckland	47,348
Wellington	45,843
Canterbury	41,964
Taranaki	8,062
Waikato	7,070
Otago	5,088
Gisborne	4,090
Nelson	4,000
Northland	*3,450*
Southland	1,926
Westland	1,644
Hawkes Bay	1,386
Manawatu-Wanganui	1,177
Bay of Plenty	1,084

Source: Ryan et al (1998, p.77).

notable that the very months when Northland most needs visitors (June and July) are those when there were no special events. Table 3.4 shows the average visitation levels of special events by region in 1998. Given that Northland's greatest source of visitors is Auckland and that as such, 28% of New Zealand's population lives within two or three hours drive of Northland, the attendance figures in Table 3.4 should be able to be significantly increased.

Northland's schedule of special events has developed since this survey was made and while sporting events (particularly sailing and fishing) still feature prominently, the schedule now includes a greater variety of events. These events cater to a wide range of interests from the Russell Oyster Festival to the Far North Garden Safari to the Dargaville River Festival.

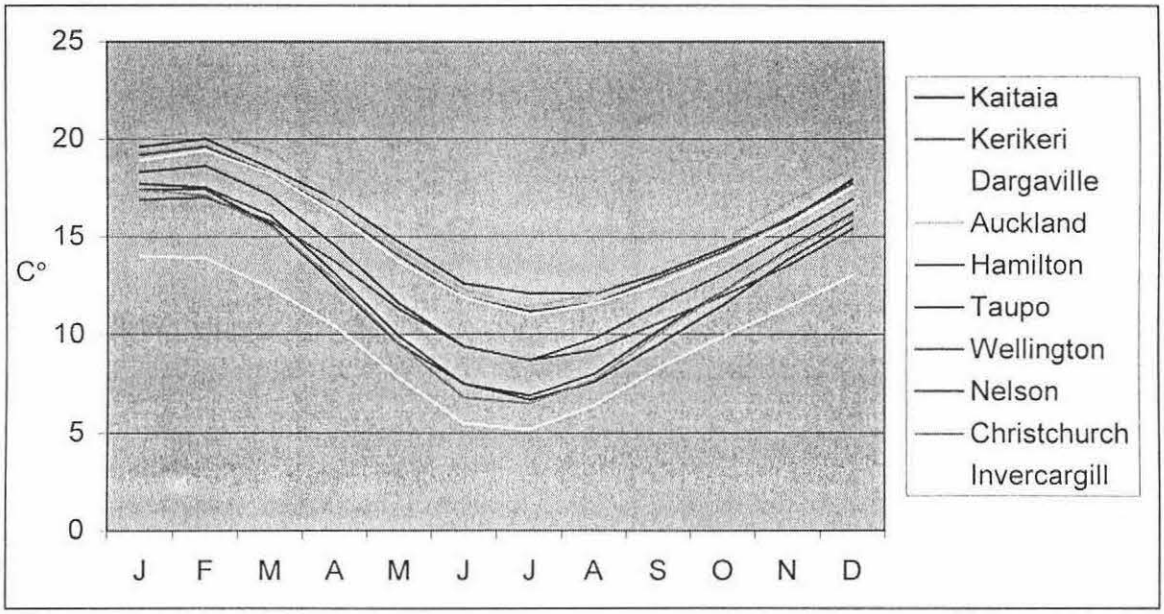
One of the respondents to the survey of Northland's tourism-based businesses stated that some of Northland's tourism-based businesses were uniting to organise further regular special events to attract visitors throughout the year. Northland's promotion of its special events is not as effective as it could be due to a lack of funding available for marketing. Promotion is, however, something that special events cannot afford to be without.

3.5 Climate

It can be easily assumed that seasonality in Northland is driven by the region's weather conditions. This section examines Northland's weather conditions to determine whether that assumption is justified. The comparison of the mean air temperatures for regions of New Zealand seen in Figure 3.1 shows that in the depths of winter Northland's mean air temperature is up to 6.9 degrees higher than other parts of the country. While the region's winter temperatures are well below its summer levels, Northland may still be an attractive destination, in terms of temperature, to South Islanders. Unfortunately South Islanders currently account for only a tiny proportion of Northland's visitors.

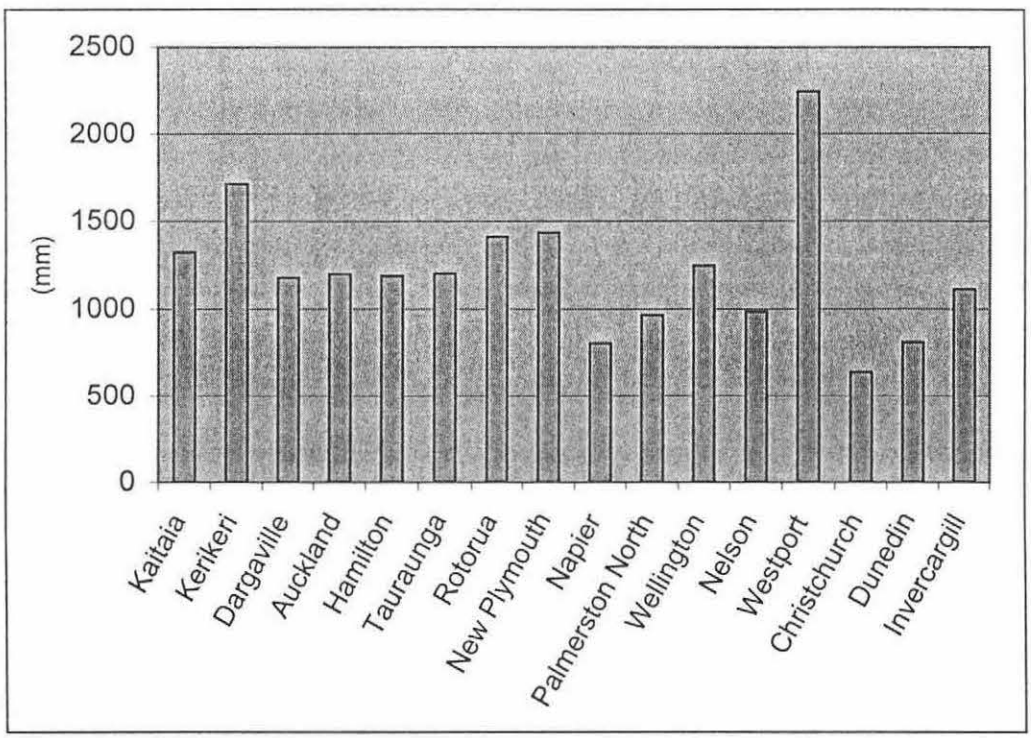
From the point of view of Northland's tourism industry, a more important element of the region's weather may be rainfall. When compared to other regions of New Zealand (see Figure 3.2) Northland can be seen to have quite a high annual rainfall. It would appear that this, and not temperature, may be the major deterrent to visitors during winter. This again shows the importance of all-weather attractions over the low season.

Figure 3.1: Mean air temperatures 1961 - 1998



Source: Metservice (1999) *Climate Summaries.*

Figure 3.2: Mean annual rainfall



Source: Metservice (1999) *Climate Summaries.*

Northland's weather over the low season does not prohibit enjoyable travel to the region. It does, however, prohibit the kind of outdoors activities and experiences that the region is currently promoting. A shift in the region's promotional themes towards less summer-reliant activities may see an increase in the number of visitors to Northland that are interested in other aspects of the region. This would help to reduce the region's seasonality as only the most water and sun-dependent activities could not be operated over the low winter season.

4 Survey of Auckland Residents

4.1 Methodology

4.1.1 Introduction

This section examines the results of a survey of 548 Auckland residents. Chapter 4 presents the data from the first section of the survey which examined the general travel behaviors of the sample. Chapter 5 presents the data from the second section of the survey which examined Auckland residents' travel behaviours with specific reference to the Northland region.

4.1.2 Research objectives

- To provide information on the factors determining the timing of Auckland residents' travel.
- To determine whether these factors are significantly different for various market segments.
- To determine whether these factors are significantly different for international and domestic travel.
- To determine what measures would encourage Auckland residents to travel to a destination during its low season.
- To determine whether these measures are significantly different for various market segments.
- To generate information on Auckland residents' travel habits regarding Northland.
- To generate information on seasonality's importance to Auckland residents using Northland as a specific destination.

4.1.3 Sample design

By far the biggest origin region of domestic visitors to Northland is Auckland. As such, the sample for this research was drawn from the nine electoral roles of the Auckland region. Although the telephone book might have provided more up to date addresses, this source would not have represented people without telephones or with unlisted telephone numbers. Using the electoral roles also ensured that respondents were at least 18 years old. The sample for this research was systematically, randomly selected.

4.1.4 Research strategy and data collection

The research was designed to be of a descriptive, deductive nature that would generate predominantly quantitative data. The research was conducted through the use of a closed-question postal questionnaire. A postal questionnaire was chosen for this research as this is a relatively fast and cost-effective way of reaching a large, geographically diverse sample. Postal questionnaires can remove any bias that may exist when interviews are conducted but also reduce the ability of the researcher to clarify any questions for the respondent should confusion arise. It was possible to use closed questions in this questionnaire as the parameters of the possible responses were already known. Likert scales featured dominantly in the questionnaire as they are a very useful way of measuring the attitudes of respondents.

In December 1998, the survey was posted to the 1498 identified recipients together with a covering letter and reply paid envelope (see Appendix 1). Of these initial 1498 questionnaires, 516 were returned. A further 85 were then posted out to replace some of those that were returned due to the named recipient no longer living at the address. Of these, 32 were usably returned. This gives a total response rate of 34.62% which is an acceptable result for a postal survey.

4.1.5 Data analysis

The data from the survey was analysed quantitatively using the Minitab 12 for Windows statistical programme. Graphs were generated in both Minitab and Microsoft Excel.

4.1.6 Limitations

As with any postal survey, the data gathered will not be absolutely representative of the population. This is because not all members of the sample are equally inclined to respond to surveys. In some cases responses obtained are generally from people who feel strongly about the subject matter in some way which means that the data gathered can give a false impression by tending towards extremes of opinion. This factor is reduced in this research as seasonality in tourism is to most people not a controversial subject likely to divide the population. Much of the population are likely to have given little thought to their tourism behaviours and are unlikely to have formed strong opinions on this subject. A further limitation of this research is that the survey features questions which may require respondents to rely on their memory in answering. This may result in inaccurate responses that are based on what the respondent believes their behaviours have been and not what they actually are.

4.2 Demographics

The basic demographics profile of respondents was examined, focusing on a number of key variables (eg. sex, age, income, and place of residence) and the responses are shown in Table 4.1.

4.2.1 Sex

The proportion of females in the sample is significantly higher than that of the population. This may have some effect on the results given where the responses are not specified by sex. The proportion of females in the sample was 59% while the proportion of females in the Auckland population as recorded in the 1996 New Zealand Census of Population and Dwellings was 51%. Males made up 41% of the sample while in the 1996 Census they accounted for 49% of the Auckland population (Statistics New Zealand, 1997, p.21).

4.2.2 Age

The age distribution of respondents followed a relatively normal distribution (see Figure 4.1). This is not significantly different from that of the Auckland population. The mean age rating was 3.5971, just over the dividing line between groups 3 and 4. This can be approximated to an age of 46. Within each sex the distribution of the age groups is relatively even and is not significantly different according to sex (see Figure 4.2).

4.2.3 Income

The distribution of income among the sample had a more irregular pattern (see Figure 4.3). The incomes tended to gather around the mid- to lower-end of the scale except for quite a strong showing in the highest category. The median income grouping of the sample was group 3 which included incomes from $33,001 to $40,000. This is significantly higher than the median Auckland income of $19,053 (Statistics New Zealand, 1997, p.136). The distribution of income by age group follows a very normal distribution (see Figure 4.4).

The income levels show an expected pattern of rising and then falling as age increases. Age group one (those under 25) has the lowest income levels with half of the respondents in this group having an income of less than $30,000. The levels rise sharply through age group two and peak with age group 3 (36 years to 45 years). Income levels then decline down to age group 6 (over 66 years), half the members of

Table 4.1: Basic demographics of respondents

Characteristic	Number	Percent of total
Sex		
Male	227	41.42
Female	321	58.58
Age (years)		
(1) under 25	49	8.97
(2) 26 – 35	102	18.68
(3) 36 – 45	115	21.06
(4) 46 – 55	124	22.71
(5) 56 – 65	66	12.09
(6) over 66	90	16.48
Annual income ($)		
(1) under 20,000	124	23.80
(2) 20,001 – 30,000	89	17.08
(3) 30,001 – 40,000	95	18.23
(4) 40,001 – 50,000	63	12.09
(5) 50,001 – 60,000	41	7.87
(6) over 60,000	109	20.92
Location		
Auckland	349	63.69
North Shore	199	36.31

Figure 4.1: Age distribution of respondents

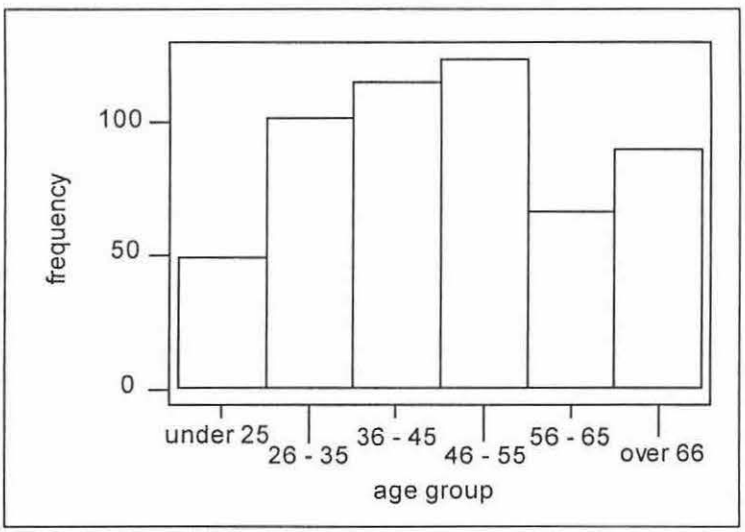


Figure 4.2: Age of respondents according to sex

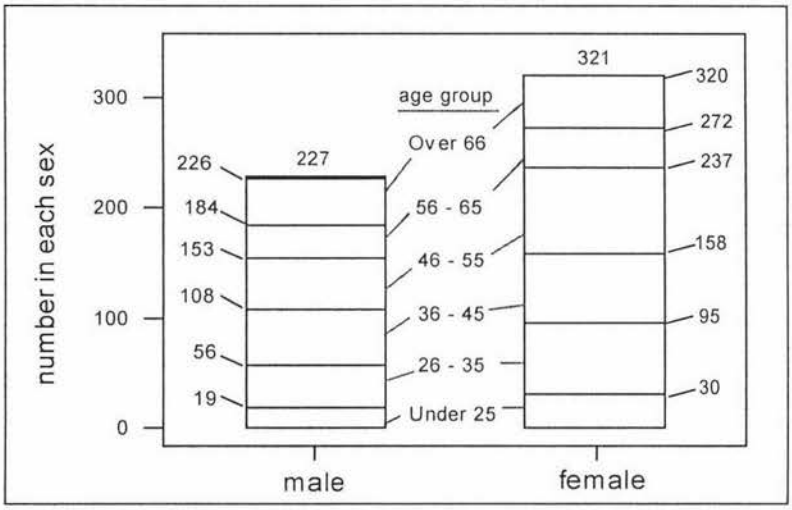


Figure 4.3: Distribution of income of respondents

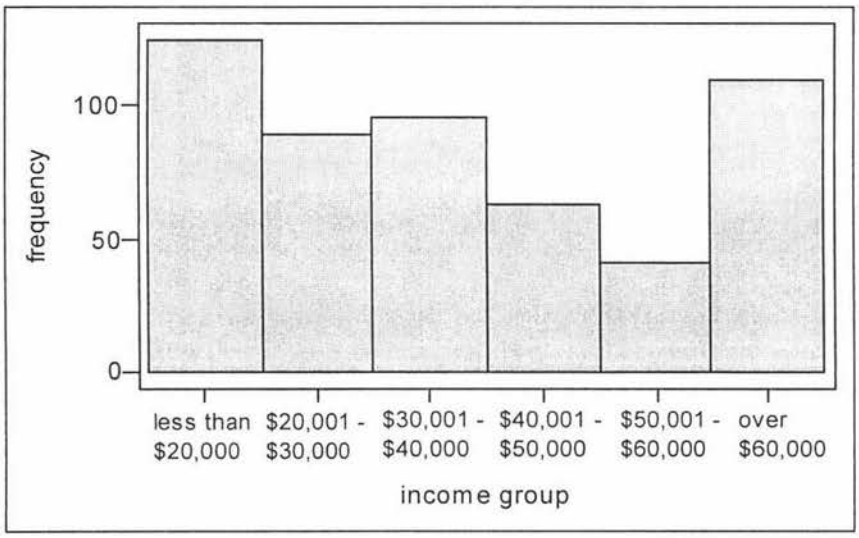
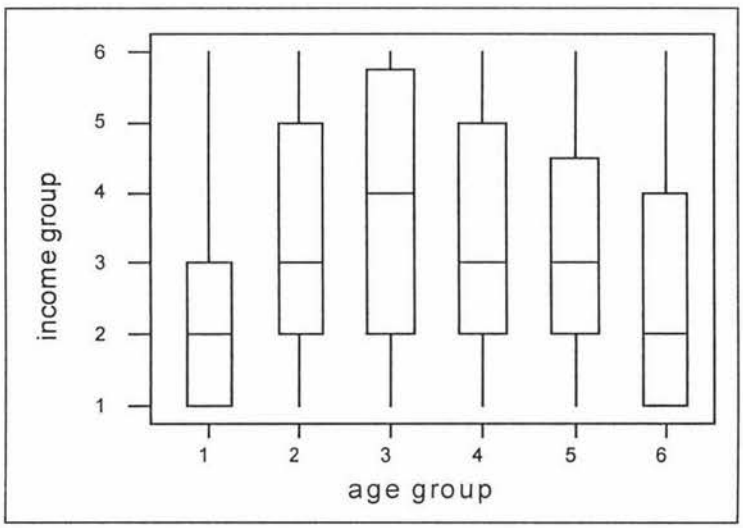


Figure 4.4: Boxplots of income distribution by age group



which have incomes under $30,000.

The distribution of income between the sexes also follows a predictable pattern (see Figure 4.5). The disparities between the sexes are extreme, with the distributions being almost a complete reversal of each other. The incomes of males tend towards the mid- to higher groups with outliers in the lower groups. The incomes of female respondents tend towards the mid- to lower groups with outliers in the higher groups. It is notable that despite the extreme differences between these figures in other areas the mean incomes of the sexes are very similar. The mean income grouping of males was 3.699 (approximately $37,000) while for females it is 3.5250 ($35,000). In the Auckland population the median incomes for males and females are $24,401 and $13,705 respectively. While the usefulness of such a statistic may be doubtful, it is possible to say that the profile of the typical respondent to this survey is a female, approximately 40 years old with an approximate income of $33,000.

4.2.4 Location

An equal number of questionnaires were sent to the nine electorates that make up the main Auckland and North Shore area. These electorates and their proportion of the total responses are shown in Table 4.2. These areas can be more usefully divided into those in the Auckland area and those in the North Shore area (see Table 4.3).

Figure 4.5: Boxplots of the distribution of income by sex

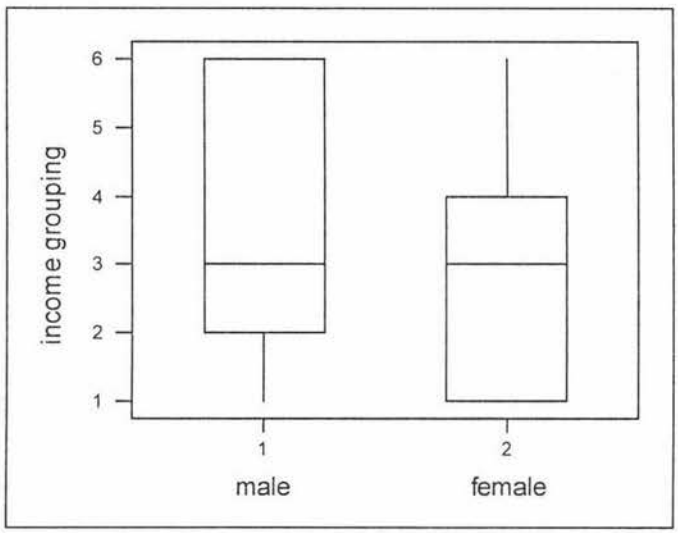


Table 4.2: Location of proportion of respondents

Location	number of responses	% of total responses
Albany	65	11.86
North Shore	71	12.96
Northcote	63	11.50
Auckland central	56	10.22
Epsom	63	11.50
Maungakiekie	50	9.12
Mt Albert	56	10.22
Mt Roskill	60	10.95
Tamaki	64	11.68

Table 4.3: Simplified locations and their proportion of respondents

Location	number of responses	% of total responses
Auckland	349	63.69
North Shore	199	36.31

4.3 Travel Profile of Respondents

4.3.1 Recent travel

Auckland residents were asked about their travel during 1998. From the survey results, it was evident that 54 per cent of respondents had travelled overseas in that period while nearly 90 per cent had travelled to another part of New Zealand. More specifically, 57 per cent had travelled to the Northland region (see Table 4.4). This level of visitation to the Northland region may seem high but it should be remembered that the Auckland region is estimated to account for "approximately 80% of domestic visitors to Northland" (NZTB, 1996, p.20). Through proximity alone, Northland is one of the regions of New Zealand that Auckland residents are most likely to visit. The relatively short times from Auckland and low costs involved in travelling shorter distances can be very attractive.

4.3.2 Factors influencing the likelihood of visiting an area of New Zealand

This question produced some interesting results concerning which factors would make Auckland residents more likely or less likely to visit an area of New Zealand. Five-point Likert scales were used to measure the desirability of each factor and the mean ratings are listed in Table 4.5. This shows which factors are regarded as the most attractive.

The respondents' ranking of the factors supports the traditional view of the elements that motivate holiday travellers. Crandall's list of recreation motivations (see Table 4.6) shows how important the elements of relaxation and escape from routine are to recreational activities. These elements can also be applied to recreational travel and the resulting rankings given to the factors are therefore reasonably predictable. Landscape, weather conditions, and low costs of transport and accommodation rank highly and unpredictable weather, the presence of other tourists, and high accommodation/transport costs were ranked at the bottom of the scale. The relatively high ranking of historical attractions is significant. This may suggest a move away from the sun, sand, surf holiday to a more cultural experience, a trend widely recognised in the growing literature on heritage tourism with Hall and McArthur (1996, p.2) noting that "heritage tourism is now big business".

The staging of a special event yielded a surprisingly low ranking given their importance in the promotion and planning of New Zealand tourism destinations. Indeed, Ryan, Smee, Murphy and Getz (1998, p.82) note that "events in New Zealand, as elsewhere, are continuing to grow and to be taken more seriously as an important

Table 4.4: Destinations travelled to by Auckland residents in the last year

Destination	Number of respondents	Per cent of sample*
Another country	297	54.30
Another part of New Zealand	491	89.76
Northland region	312	57.04

*Percentages do not sum to 100 as some respondents are counted in more than one category

Table 4.5: Factors affecting the likelihood of Auckland residents visiting an area of New Zealand (in descending order of attraction)

Factor	Mean
Beautiful natural scenery	1.5947
Fine weather	1.8542
Low accommodation/transport costs	1.9363
Peace and quiet	1.9549
Wide range of activities	2.1603
Historical attractions	2.2819
Few other tourists	2.3008
Friendly locals	2.3125
Lots of outdoor activities	2.3378
Staging of a special event	2.7981
Lots of indoor activities	3.0830
Suitability for families	3.1939
Good local transport	3.2399
Lots of activities for children	3.5556
Poor local transport	3.7973
Unpredictable weather	4.0987
Lots of other tourists	4.2814
High accommodation/transport costs	4.3435

Table 4.6: Crandall's list of motivations

1 *Enjoying nature, escaping from civilisation*
To get away from civilisation for a while
To be close to nature

2 *Escape from routine and responsibility*
Change from my daily routine
To get away from the responsibilities of my everyday life

3 *Physical exercise*
For the exercise
To keep in shape

4 *Creativity*
To be creative

5 *Relaxation*
To relax physically
So my mind can slow down for a while

6 *Social contact*
So I could do things with my companions
To get away from other people

7 *Meeting new people*
To talk to new and varied people
To build friendships with new people

8 *Heterosexual contact*
To be with people of the opposite sex
To meet people of the opposite sex

9 *Family contact*
To be away from the family for a while
To help bring the family together more

10 *Recognition, status*
To show others I could do it
So others would think highly of me for doing it

11 *Social power*
To have control over others
To be in a position of authority

12 *Altruism*
To help others

13 *Stimulus seeking*
For the excitement
Because of the risks involved

14 *Self-actualisation (feedback, self-improvement, ability utilisation)*
Seeing the results of your efforts
Using a variety of skills and talents

15 *Achievement, challenge, competition*
To develop my skills and ability
Because of the competition
To learn what I am capable of

16 *Killing time, avoiding boredom*
To keep busy
To avoid boredom

17 *Intellectual aestheticism*
To use my mind
To think about my personal values

Source: Crandall (1980, cited in Hall and Page, 1999, p.27).

component of tourism infrastructure". These results suggest that it may be that rather than actually attracting visitors to an area, special events are "a reason for visitors already in an area to stay longer" (Getz, 1997, p.52). Either way, they certainly "can have tourism value" (Getz, 1997, p.52) as indicated by the prominence in the promotional strategies in regions and local areas in New Zealand. It is also possible that in answering this question respondents were considering high season domestic travel while special events have more of an influence on low-season domestic travel.

One factor that rated much higher than staging a special event was a 'wide range of activities'. This suggests that investment by regional tourism bodies in establishing a wide range of permanent activities rather than focussing on special events which are by nature only temporary, could be more effective. Yet special events are by their very nature more cost effective when capital investment is limited for the tourism sector.

The last eight of these factors in Table 4.5 were given ratings over 3 which shows what would make respondents 'less likely' to visit an area. It is interesting to note that both 'suitability for families' and 'lots of activities for children' fall into this range. Clearly most respondents do not need to take children into account when travelling. In fact, 'lots of activities for children' was given a negative rating which is a relatively large distance from the neutral position. This suggests that respondents will actively avoid an area which they suspect will contain families holidaying with children. Kruskal-Wallis tests were then carried out that identified groupings in the sample according to the motivation for travelling. Motivations for travel vary enormously and in the case of holiday travel in particular, motivation can be linked to recreation motivations such as those identified by Crandall (see Table 4.6).

4.3.2.1 Kruskal-Wallis tests

Krukal-Wallis tests were carried out on the results outlined in Table 4.5 to see if the sexes had significantly differing opinions on the importance of any of these factors which determined their predisposition to visit an area of New Zealand. The resulting p-value for each factor that was less than 0.05 (and therefore indicated a significant difference between the responses given by each sex) are shown in Table 4.7. From these results it can be determined that:

- Beautiful natural scenery is significantly more important to women than to men.
- Good local transport is significantly more important to women than to men.
- High accommodation/transport costs make women significantly less likely then men to visit an area.

- Peace and quiet is significantly more important to men than to women.

Women are more likely than men to fall under the 'enjoying nature, escaping from civilisation' grouping from Table 4.6 as they are more attracted by beautiful natural scenery. Men are more likely than women to fall into the 'escape from routine and responsibility' and 'relaxation' groups in Table 4.6. This may reflect the higher employment levels amongst men and the greater probability that they will have work- related stress. The other differences also reflect the disparity in the incomes of men and women.

Kruskal-Wallis tests were carried out with age as the differentiating factor. The resulting significant p-values are shown in Table 4.8. It is evident that age is a major determinant of the factors that impact upon the attractiveness of a destination. It can be determined that:

- Fine weather is significantly more likely to attract people aged under 25.
- Lots of other tourists at the destination is significantly more likely to make people aged under 25 visit an area.
- Suitability for families is significantly more likely to make people aged between 36 and 45 visit an area.
- Good local transport is significantly more likely to attract people aged under 25.
- Unpredictable weather is significantly less likely to attract people aged over 66.
- A wide range of activities is significantly less likely to attract people aged over 66.
- Lots of activities for children are significantly more likely to make people aged between 36 and 45 visit an area.
- Historical attractions are significantly less likely to attract people aged under 25.
- Low accommodation/transport rates are significantly more likely to make people aged under 25 or over 66 visit an area.
- Poor local transport is significantly less likely to attract people aged under 25 or over 45.
- Outdoor activities are significantly less likely to attract people aged over 66 to a destination.
- Lots of indoor activities are significantly less likely to attract people aged over 66.

These results show how inefficient a mass-marketing approach to tourism promotion may be when the wants of various groups are so different. In particular, it indicates that careful targeting of niche groups is a more cost-effective solution to product

Table 4.7: Kruskal-Wallis test significant p-values for the influence of various factors on the likelihood of Auckland residents visiting an area of New Zealand, by sex

Factor	p-value
Beautiful natural scenery	0.007
Peace and quiet	0.042
Good local transport	0.019
High accommodation/transport costs	0.013

Table 4.8: Kruskal-Wallis test significant p-values for the importance of various factors affecting the likelihood of Auckland residents visiting an area of New Zealand, by age.

Factor	p-value
Fine weather	0.008
Low accommodation/transport costs	0.004
Wide range of activities	0.010
Historical attractions	0.001
Lots of outdoor activities	0.000
Lots of indoor activities	0.000
Suitability for families	0.000
Good local transport	0.007
Lots of activities for children	0.000
Poor local transport	0.008
Unpredictable weather	0.030
Lots of other tourists	0.027

Table 4.9: The conventional life-stage scenario

Stage	Age
Dependent	<18
↓	
Bachelor	<24
↓	
Young married	<28
↓	
Full nest I (Child under the age of 5)	<35
↓	
Full nest II	<50
↓	
Empty nest I (Adults continue in work)	<65
↓	
Empty nest II (Retirement stage)	>65
↓	
Survivor	

Source: Ryan (1995, p.67).

promotion. These results could be used to focus a destination's activities to attract specific age-defined market segments. Age can be a useful basis for niche marketing and there are recognised traveller groupings according to age such as those shown in Table 4.9. This shows a typical progression of life-stages and can be useful in understanding the results of this section.

The results show a logical grouping given the characteristics of the age groups. The respondents aged under 25 are shown to prefer outdoor oriented-destinations with opportunities for socialising. They are clearly more likely to fall into the 'social contact', 'meeting new people', and 'heterosexual contact' groupings according to the factors listed in Table 4.6. Respondents under 25 also want good local transport and low accommodation and transport costs due to their relatively low incomes. There is probably an element of the 'killing time, avoiding boredom' grouping in their travel as well. This age group is disinterested in historical attractions.

Not surprisingly, family suitability is of most importance to respondents aged between 36 and 45, those most likely to have children to consider in the decision-making process. This age range represents the 'family contact' grouping from Table 4.6. The other age group to feature strongly are those respondents over the age of 66. They are shown to prefer predictable weather conditions and low accommodation and transport costs. This latter point reflects their generally lower income level. This group is also shown to be independent in its travel with activities of any kind being of little importance.

Kruskal-Wallis tests were also carried out with income as the differentiating factor. The resulting significant p-values are shown in Table 4.10 and from these it is evident that:

- Unpredictable weather is significantly less likely to attract people with an income under $30,000.
- Low accommodation/transport costs are of significantly less importance for people with incomes over $60,000.
- Friendly locals are significantly more likely to attract people with an income under $20,000.
- High accommodation/transport costs are of significantly less importance for people with incomes over $60,000.

This first result supports the argument that seasonality is more pronounced amongst lower income travellers (Pearce, 1989). The argument posits that these travellers are

Table 4.10: Kruskal-Wallis test significant p-values for the factors affecting the likelihood of Auckland residents visiting an area of New Zealand, by income

Factor	p-value
Low accommodation/transport costs	0.001
Friendly locals	0.001
Unpredictable weather	0.021
High accommodation/transport costs	0.009

Table 4.11: Factors present in the factors affecting the likelihood of Auckland residents visiting an area of New Zealand

	Factor		% of sample
Factor 1	positive	few other tourists historical attractions peace and quiet	12.8
	negative	lots of other tourists	
Factor 2	positive	suitability for families lots of activities for children	11.5
Factor 3	positive	low accommodation/transport rates	9.9
	negative	unpredictable weather high accommodation/transport rates poor local transport	
Factor 4	negative	staging a special event lots of indoor activities lots of outdoor activities	9.2
Factor 5	positive	fine weather beautiful natural scenery	8.7
Factor 6	positive	good local transport	8

less able to counteract the negative aspects of the low season (with tools such as air-conditioning or heating) and are therefore restricted to travelling in the high season. In this case it may be that these travellers rely on the low cost outdoor activities provided by beaches and National Parks, and would be unable to afford the cost of indoor activities such as museums if the weather drove them inside. Another element to seasonality in the lower income groups is that these groups may only be able to afford one holiday period each year so that their domestic holiday needs to be reliable in terms of expected conditions, costs, and overall experience. This reliability, particularly in terms of weather conditions, is more likely to be found during a destination's high season. The role of friendly locals in the results is an interesting outcome and may relate back to the socialising sought by people under 25 as this age group more likely to have the lower income level.

4.3.2.2 Factor analysis

A factor analysis was carried out on the 'factors affecting the likelihood of Auckland residents visiting an area of New Zealand'. Factor analyses reduce the dimensions of data to attain a more manageable and accurate set of variables. This process gathers the existing variables into groups according to which ones tend to have correlated responses. Therefore the six factors shown in Table 4.11 represent the original eighteen variables listed in the questionnaire. This analysis also gives a more useful set of factors to be used in a cluster analysis. Six factors were identified, accounting for 60.2 per cent of the sample. The resulting factors are new variables which can be described to show which of the original variables are present in each one. The components of factor 1 suggest that this factor measures the importance of a peaceful experience. Factor 2 clearly measures the importance of family-based facilities. Factor 3 measures the importance of a basic low cost, sun-filled experience. Factor 4 measures the importance of independence in respondents' travel plans. Factor 5 also measures the importance of traditional holiday elements but without the emphasis on cost seen in factor 3. Factor 6 measures the importance of good local transport.

4.3.2.3 Cluster Analysis and cross-tabulation

A hierarchical agglomerative cluster analysis (using Ward's method of linkage)[1] was carried out on the 'factors affecting the likelihood of Auckland residents visiting an area

[1]A hierarchical cluster analysis was chosen as this method allows the clusters to form more naturally than specifying the number of clusters beforehand as in a non-hierarchical analysis. Ward's method was used as this method forms clusters based on the similarity of the cluster-

of New Zealand'. This was used to identify groups within the sample which responded similarly in terms of the Factor scores from section 4.3.2.2. The resulting clusters can then be used to identify market segments within the population. Mill and Morrison (1992, p.423) describe market segmentation as being when "people with similar needs, wants and characteristics are grouped together so that an organisation can use greater precision in serving and communicating with its chosen customers". The clusters resulting from this analysis, then, could be used to focus Northland's promotional activities to the region's preferred market segments.

The number of clusters that can be usefully described is determined by the dendogram shown in Figure 4.7. The point needs to be found which balances the need for clearly differentiated groups with the decreasing size of each cluster (and consequently, their decreasing usefulness). This dendogram suggests that five clusters should be identified (see Figure 4.7). The clusters can be described as follows using the Factors established in the factor analysis. Cluster 1 is composed of respondents for whom Factor 6 was significantly important and Factor 2 was significantly unimportant. They can thus be seen to be without children or their own transport. Cluster 2 is composed of respondents for whom Factor 4 was significantly unimportant. They can therefore be seen to prefer to have a wide selection of activities and special events to choose from. Cluster 3 is composed of respondents for whom Factors 2 and 6 are significantly important. They have a need for family-friendly facilities and also require a good local transport system. Cluster 4 is composed of respondents for whom Factors 1 and 3 are significantly important. They are looking for a sunny and peaceful experience on a budget. Cluster 4 is composed of respondents for whom Factors 3 and 6 are significantly unimportant. They are not as concerned about the cost and do not rely on there being a good local transport system. A cross-tabulation of the clusters and the nominal variables of sex, age, and income revealed that while there is no significant relationship between sex and the clusters or between income and the clusters, there is a significant relationship between age and the clusters. Age is again shown to be a very significant factor in choosing a domestic destination.

---

members rather than the differences between the clusters. In this case this produced the most useful information (Sharma 1996).

Figure 4.7: Dendogram showing clusters present in the factors affecting the likelihood of Auckland residents visiting an area of New Zealand

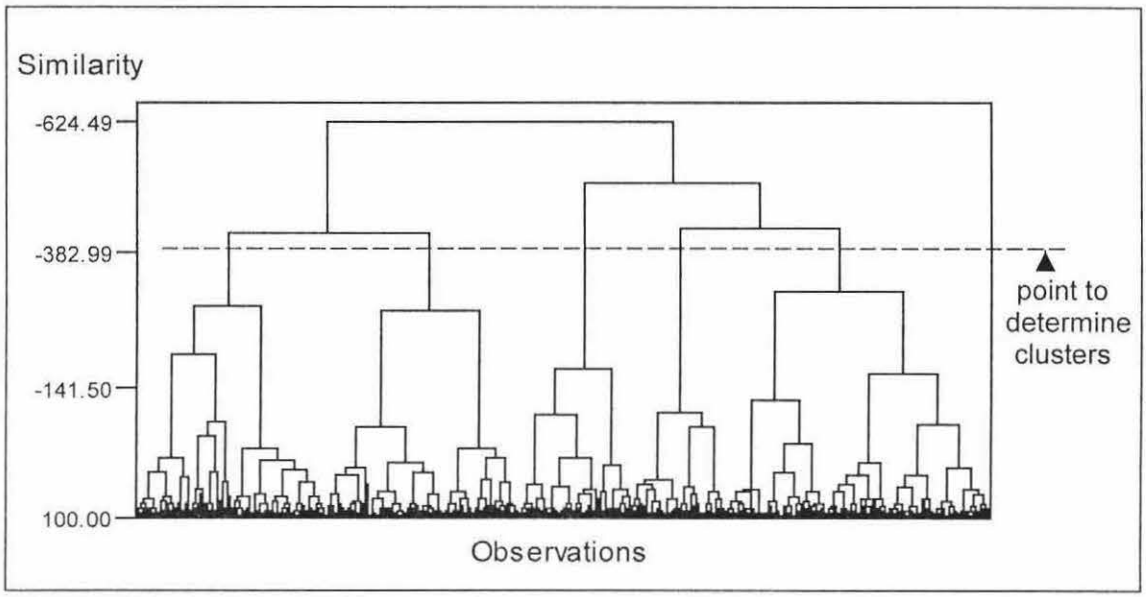


Table 4.12: Determinants of the timing of domestic travel (in descending order of importance)

Factor	Mean
Personal/family special occasions	2.1038
Work schedule	2.1069
Accommodation/transport prices	2.3498
Weather conditions at the destination	2.4395
Public holidays	2.8530
Destination staging a special event	3.0248
School holidays	3.2783
Destination holding a sporting event	3.7179

Table 4.13: Determinants of the timing of overseas travel (in descending order of importance)

Factor	Mean
Accommodation/transport prices	1.9788
Work schedule	2.1476
Weather conditions at the destination	2.2119
Personal/family special occasions	2.3783
Destination staging a special event	3.1637
Public holidays	3.4083
School holidays	3.4141
Destination holding a sporting event	3.8560

4.3.3 Influences on the timing of international and domestic travel

Through the use of five-point Likert scales on the questionnaire survey, respondents were asked how important certain factors were in determining the timing of both their domestic and overseas travel. The mean rating for each factor has been used to rank the importance of these factors (see Table 4.12). These results are interesting when compared to the results given for the importance of the same factors in determining overseas travel. These results are shown in Table 4.13, again ranked by their mean.

Interestingly, climatic conditions at the destination, believed to be one of the principal elements contributing to seasonality, rank only fourth and third respectively for domestic and overseas travel. For domestic travel in particular, personal or family special occasions, work schedules, and accommodation and transport costs were more influential than weather conditions. Public and school holidays, and the destination staging a special event or a sporting event, take the last four places for both domestic and international travel.

These results are interesting but one also has to recognise that "you cannot simply look at what people do and associate it with what people want to do" (Hall and Page, 1999, p.25). In the domestic travel results for example, while accommodation and transport costs rank as the third most influential factor on the timing of travel, it may be that most people would prefer that price did not play such an influential role in their travel plans. Tourism planners need to recognise that "any analysis of demand should also consider why people do not participate and examine ways of overcoming such obstacles by the provision of new resources as well as understanding social and cultural barriers" (Hall and Page, 1999, p.25).

4.3.3.1 Kruskal-Wallis tests

The domestic travel responses were analysed using Kruskal-Wallis tests to identify any significant differences of opinion between the sexes. The significant p-values are shown in Table 4.14. From these results it is evident that:

- Personal/family special occasions are significantly more important for women than for men.
- Accommodation/transport prices are significantly more important for women than for men.
- A destination staging a special sporting event is significantly more important for men than for women.

These results again reflect the disparity of income between men and women as accommodation and transport costs are significantly more important to women than to men. It may also be that women are more likely to be taking the costs of travelling with children into account when determining the total cost of their travel. These results show that men are more attracted to special events than women. This may be the result of the large number of domestic sporting special events and their central role in New Zealand culture.

Kruskal-Wallis tests also identified a number of significant differences in opinion between the sample's age groups (see Table 4.15). The age of the respondent had a major effect on which factors determined the timing of their domestic travel. From these results it can be determined that:

- Work schedules are significantly less important for people aged over 56.
- Accommodation/transport prices are significantly less important for people aged between 26 and 35 and between 46 and 55.
- Public holidays are significantly less important for people aged over 66.
- School holidays are significantly more important for people aged between 36 and 45.
- School holidays are significantly less important for people aged over 56.
- A destination staging a special event is significantly more important for people aged under 25.
- A destination staging a special event is significantly less important for people aged over 66.

These results are not unexpected given the literature on the determinants of travel (such as Hall and Page 1999). The characteristics of each age group can be related back to the conventional life-stage scenario shown in Table 4.9. Work schedules are less important for people aged 56 or over while public holidays are less important for people over 66 due to the impact of retirement on the availability of leisure time. Accommodation and transport prices are less important for people between 26 and 35 and between 46 and 55. These two age groups are likely to have a larger amount of disposable income than others for a number of reasons. The younger group ('young married'/'full nest I') are often in the process of establishing a career for themselves and may not yet have children. This is increasingly the case for people who delay marriage and having children. The older group ('full nest II'/'empty nest I') have older children and are still working as retirement approaches. This is supported by the fact that school holidays are more important for people between 36 and 45 ('full nest I'/'full nest II') and less important for people aged over 56.

Table 4.14: Kruskal-Wallis test p-values for the determinants of the timing of domestic travel by sex

Factor	p-value
Personal/family special occasions	0.000
Accommodation/transport prices	0.025
Destination holding a sporting event	0.001

Table 4.15: Kruskal-Wallis test p-values for the determinants of the timing of domestic travel, by age

Factor	p-value
Work schedule	0.000
Accommodation/transport prices	0.000
Public holidays	0.000
Destination staging a special event	0.001
School holidays	0.000

Table 4.16: Kruskal-Wallis test significant p-values for the determinants of the timing of overseas travel, by sex.

Factor	p-value
Accommodation/transport prices	0.007
Personal/family special occasions	0.032

Table 4.17: Kruskal-Wallis test significant p-values for the determinants of the timing of overseas travel, by age.

Factor	p-value
Accommodation/transport prices	0.013
Work schedule	0.001
Personal/family special occasions	0.002
Public holidays	0.000
School holidays	0.000

A special event is more important for people under 25. It might have been expected that a special event would have appealed to the middle aged groups as well. Furthermore, special events are less important for people aged 66 and over. This is an age group with increased leisure time that is often thought to be attracted by appropriate special events.

Kruskal-Wallis tests also identified significantly different opinions between the income groups. With a p-value of 0.001, accommodation/transport prices was the only factor significantly affected. It was apparent that:

- Accommodation/transport prices are significantly more important to people with an income of under $20,000.
- Accommodation/transport prices are significantly less important to people with incomes over $50,000.

These results indicate that price can indeed be the driving factor of domestic destination choice.

The same Kruskal-Wallis tests were then performed on the results for the determinants of overseas travel. These results are presented here, beginning with significant differences of opinion between the sexes as shown in Table 4.16. From these results it is evident that:

- Accommodation/transport prices are significantly more important for women than men.
- Personal/family occasions are significantly more important for women than for men.

These results are the same as the results of the tests on the timing of domestic travel except that in this case the sexes do not differ significantly in their view of the importance of special events in determining overseas travel.

Kruskal-Wallis tests were then performed to identify significant differences between the age groups as shown in Table 4.17. From these results it can be determined that:

- Work schedules are significantly less important for people aged 56 and over.
- Public holidays are significantly less important for people aged 66 and over.
- School holidays are significantly more important for people aged between 36 and 45.
- Accommodation/transport prices are significantly less important for people aged between 46 and 55.
- Personal/family special occasions are significantly more important for people 66 and over.

- Personal/family special occasions are significantly less important for people aged between 46 and 55.

These results are similar to those for the tests on the timing of domestic travel. There are some major differences though. Accommodation/transport prices are less important for only those people aged between 46 and 55. Personal/family occasions appear in these results as being more important for people aged 66 or over. This suggests that this age group is less inclined to travel overseas and so personal/family occasions provide an important motivating factor for travel. People aged between 46 and 55 have priorities other than personal and family occasions when they travel overseas. Interestingly, special occasions do not appear prominently in these results as they did for domestic travel.

Kruskal-Wallis tests were also employed to test for significant differences between the various income groups. As the resulting p-values were not less than 0.05 it can be deduced that income is not a significant factor in determining the timing of overseas travel. This is a surprising result given that income was a significant factor in the timing of domestic travel. It may be that when people travel overseas they are expecting it to be expensive and that the cost may be more acceptable in this context as overseas travel is likely to be only a once yearly event. Despite this finding, research by Page (1999) on outbound travel from New Zealand highlighted the seasonal distribution of trips. These results also indicate that people are more likely to pay for the conditions they want (such as fine weather, which ranked higher in overseas travel timing determinants than in domestic travel timing determinants in Tables 4.12 and 4.13). In domestic travel price may be more influential as domestic trips may be a more frequent occurrence which people do not so readily equate with a high cost or the need for perfect conditions. In domestic travel price-sensitivity is a major issue because domestic destinations may seem more easily able to be substituted for each other. They may avoid visiting a domestic region when the associated costs seem too high, as there are many other competing destinations to choose from.

4.3.3.2 Factor analysis

A factor analysis was carried out to assess the factors that determine the timing of domestic travel. Four Factors were identified, accounting for 69.5 per cent of the sample. Their characteristics are shown in Table 4.18. These results make it possible to describe these new variables called Factors. Factor 1 measures the importance of time constraints. Factor 2 measures the importance of special events. Factor 3

measures the importance of value for money in terms of weather and cost. Factor 4 measures the importance of personal and family occasions.

A factor analysis was carried out on the factors that determine the timing of international travel. Four Factors were identified, accounting for 70.3 per cent of the sample. Their characteristics are shown in Table 4.19. From these results it is possible to describe the new variables. Factor 1 measures the importance of set public and school holidays. Factor 2 measures the importance of special events. Factor 3 measure the importance of value for money in terms of weather and cost. Factor 4 measures the importance of personal and family occasions.

4.3.4 Timing of domestic travel

Respondents were asked during which months they undertook domestic travel (see Figure 4.8). The responses formed a typical demand distribution associated with seasonality. The slight rise in April is most likely due to Easter holidays; in June and July to winter-based holidays, and in September to school holidays. The decrease in the number of respondents undertaking domestic travel during November may be a result of people postponing their travel until they can combine it with the Christmas and summer periods. It is interesting to compare this Figure with the distribution of domestic travel shown in Figure 4.9. Figure 4.9 shows the pattern of domestic travel in 1989 and the comparison would seem to support the theory that travel is becoming increasingly seasonal (Soesilo and Mings 1987).

4.3.4.1 Kruskal-Wallis tests

Kruskal-Wallis tests were carried out to determine whether there were significant differences between the sexes in the timing of their domestic travel (see Table 4.20). For all of these months, men were shown to be more likely to undertake domestic travel than women. This may be the result of business travel or the fact that men experience less barriers to travel compared to women in terms of accommodation and transport costs.

Kruskal-Wallis tests were carried out to determine whether there are significant differences between the age groups in the timing of domestic travel. The resulting significant p-values are shown in Table 4.21. For these months there was a significant difference between the age groups. The results showed that:

- People aged over 56 are significantly less likely to travel during January.

Table 4.18: Factors present in the factors affecting the timing of Auckland residents' domestic travel

	Factor		% of sample
Factor 1	important	their work schedule public holidays school holidays	21.2
Factor 2	unimportant	destination holding a sporting event destination staging a special event	19.1
Factor 3	important	weather conditions at the destination accommodation/transport costs	16.2
Factor 4	important	personal/family occasions	13

Table 4.19: Factors present in the factors affecting the timing of Auckland residents' international travel

	Factor		% of sample
Factor 1	important	public holidays school holidays	20.2
Factor 2	important	destination holding a sporting event destination staging a special event	19.9
Factor 3	important	weather conditions at the destination accommodation/transport costs	17.3
Factor 4	unimportant	personal/family occasions	12.8

Figure 4.8: Months during which respondents undertake domestic travel

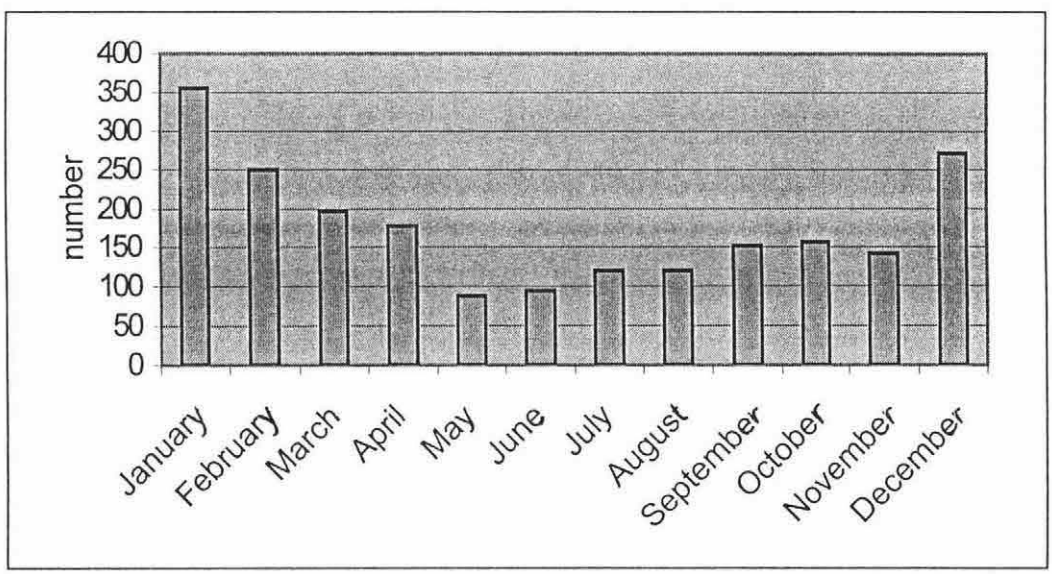
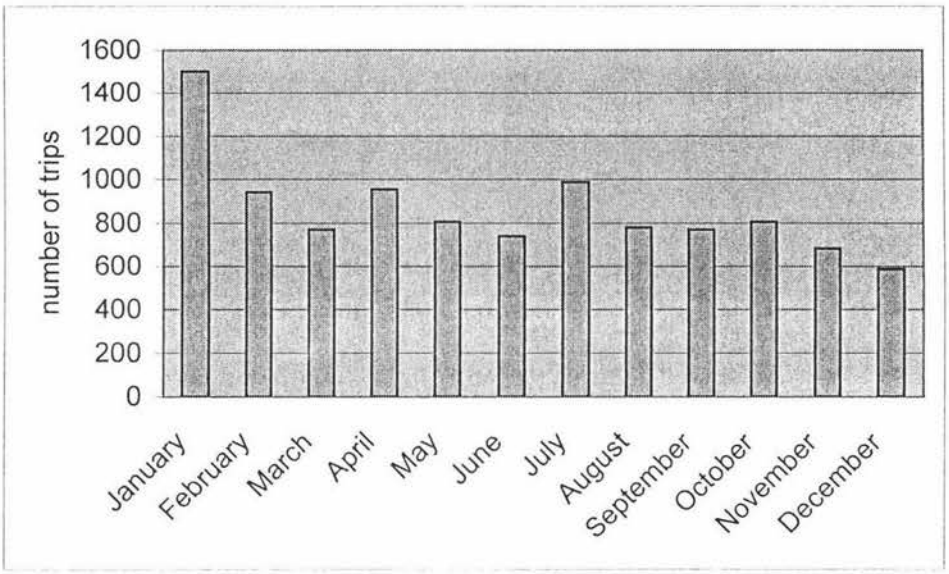


Figure 4.9: Month travel was completed – 1989



Sources: New Zealand Tourist and Publicity Department (1989) p.19.
New Zealand Tourism Department (1991) p.14.

- People aged over 56 are significantly less likely to travel during March.
- People aged between 46 and 55 are significantly more likely to travel during June.
- People aged over 56 are significantly less likely to travel during July.
- People aged over 56 are significantly less likely to travel during August.
- People aged between 36 and 55 are significantly more likely to travel during September.
- People aged under 45 are significantly more likely to travel during December.

These results show some interesting patterns according to age. For example, people aged over 56 are significantly less likely to travel in January, March, July and August which suggests that this age group tend to travel in the shoulder season. This is supported by autumn foliage tours which are popular with this age group. Getz (1997, p.53) notes that "certain tourist segments have a natural preference for off-peak travel, either because of potential cost reductions or a desire to avoid crowds of other tourists". He identifies "retired persons and upper-income segments with more than one holiday opportunity a year [as] the key targets" (Getz, 1997, p.53). It may therefore be possible to extend this group's current shoulder-season travel into the low season through careful marketing. People aged between 46 and 55 are more likely to travel over the June school holiday period just as people between 36 and 55 are more likely to travel over the September school holiday period. People aged under 45 are more likely to travel in December as they are probably returning home for the Christmas period.

Kruskal-Wallis tests were carried out to identify differences between the income groups in the timing of domestic travel. With a p-value of 0.008, January was the only month significantly affected. This shows that people with an income between $50,001 and $60,000 are significantly more likely to undertake domestic travel during January. As this is traditionally a month of high levels of domestic travel it may be that this group has the resources to travel during this popular time while avoiding the associated negative aspects such as overcrowding. It may also be that this group has too many commitments during the working year to take a holiday until the accepted holiday season.

Even so, upper-income groups are still seen as a prime target for low season travel as they are able to afford more than one holiday a year (Getz 1997). Indeed, Page (1995) found that second and third short-break holidays are a major component of the holiday-taking habits of the European population. Because of this ability to take more than one

Table 4.20: Kruskal-Wallis test significant p-values for the timing of domestic travel, by sex

Month	p-value
February	0.001
March	0.000
April	0.008
May	0.015
October	0.004
November	0.004

Table 4.21: Kruskal-Wallis test significant p-values for the timing of domestic travel, by age

Month	p-value
January	0.000
March	0.000
June	0.046
July	0.003
August	0.017
September	0.008
December	0.000

Table 4.22: Factors present in the months during which Auckland residents undertake domestic travel

	Factor		% of sample
Factor 1	positive travel time	June July August	16.7
Factor 2	negative travel time	April October November	15.5
Factor 3	negative travel time	February March	12.7
Factor 4	positive travel time	January December	11.6
Factor 5	negative travel time	September	8.9

holiday, these income groups may be more likely to 'risk' visiting a destination in its low season. If conditions were not perfect they would not be as concerned as would someone for whom this was their sole annual holiday opportunity. Upper income groups can afford to have the perfect sun, sand, surf holiday in the high season (if they so desire) *and* be more adventurous in the low season.

4.3.4.2 Factor analysis

A factor analysis was carried out on the months during which domestic travel is undertaken. Five Factors were identified, accounting for 65.4 percent of the sample (see Table 4.22). From these results it is possible to describe the new variables. Factor 1 measures the importance of travelling during winter. Factor 2 measures the importance of travelling during the shoulder seasons of autumn and spring. Factor 3 measures the importance of travelling during late summer. Factor 4 measures the importance of travelling in early summer. Factor 5 measures the importance of travelling in September.

4.3.4.3 Cluster analysis

A hierarchical agglomerative cluster analysis was carried out on the months during which Auckland residents undertake domestic travel using Ward's method. This was to identify groups within the sample which responded similarly in terms of the Factor scores from section 4.3.4.2. The resulting clusters can then be used to identify groups within the population which are useful in identifying domestic travel patterns to better understand seasonality's determinants.

The number of clusters that can be usefully described is determined by the dendogram. In this case the dendogram suggests that four clusters should be identified as shown in Figure 4.10. The clusters can be described using the Factors established in the factor analysis. Cluster 1 is composed of respondents for whom Factor 4 was significantly unimportant. This cluster avoids travelling in December and January. This group's travel does not appear to be motivated by VFR Christmas travel. This group prefers to avoid the traditionally busy early-summer period.

Cluster 2 is composed of respondents for whom Factors 1 and 3 were significantly unimportant. This group avoids travelling in winter and does not avoid travelling during February and March. This group is looking for the traditional summer holiday and is not interested in winter holidays. This lack of winter travel may be due to a current lack of incentive that may be able to be reversed with appropriate marketing. Cluster 3 is

Figure 4.10: Dendogram showing clusters present in the months during which Auckland residents undertake domestic travel

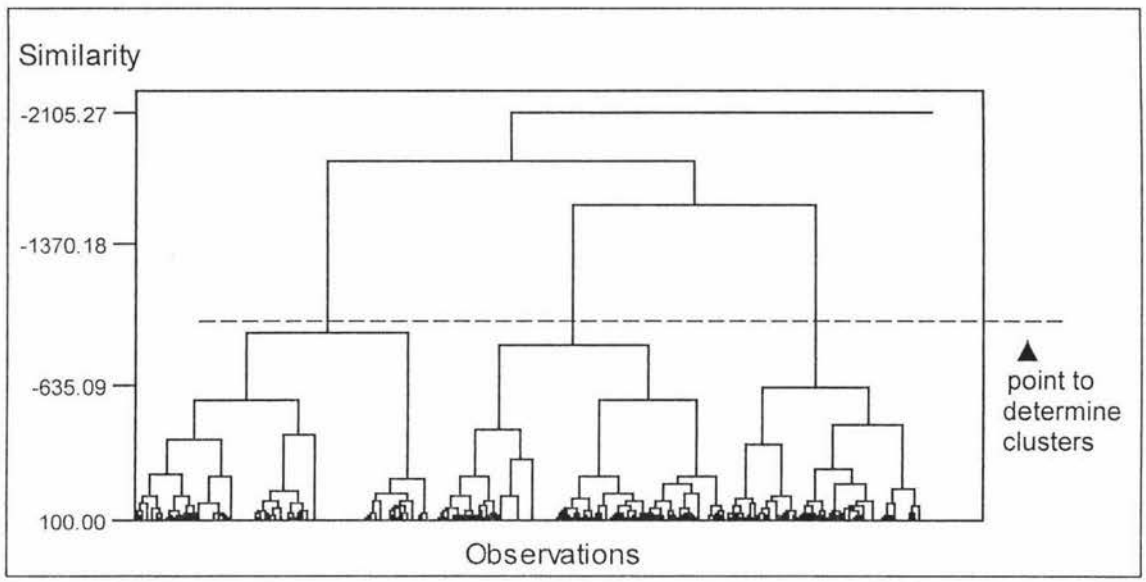


Figure 4.11: Season of the destination during which respondents usually visit

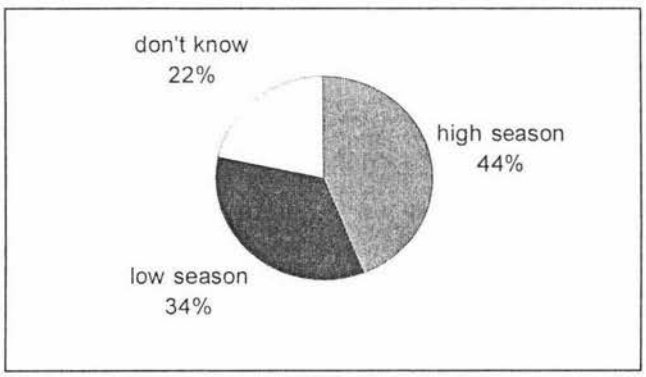


Table 4.23: Effectiveness of various factors in prompting travel to a destination during its low season (in descending order of effectiveness)

Factor	Mean
Discounted accommodation rates	1.8110
Discounted transportation rates	2.3981
Staging of a special event	2.5824
All-weather attractions	2.7838
All-inclusive package tours	3.1260
Staging of a special sports event	3.3556
Large-scale advertising campaigns	3.5320

composed of respondents for whom Factors 3 and 4 are significantly important. This group avoids travelling in late summer but does travel during December and January. This group may represent respondents whose main motivation for domestic travel is VFR since these months correspond with Christmas travel. Cluster 4 is composed of respondents for whom Factors 1 and 4 are significantly important and Factors 2, 3 and 5 are significantly unimportant. This group travels in winter and in early summer. They do not especially avoid travelling at other times of the year. This group may represent a number of different groupings. It may represent business travellers that travel year-round, the higher income groups that are able to travel at any time of year, or the retired that are free to travel year-round.

4.3.4.4 Seasonality and domestic travel

Respondents were then asked whether they travelled during the destination's high season or low season (see Figure 4.11). These results show similar levels of travel during the high and low seasons. It might have been expected that the proportion of respondents who knowingly visit an area during its low season would have been lower. It is also surprising that the number of people who do not know which season they are travelling in is so high. It seems that these people are not sensitive to either the positives or negatives of each season making them very susceptible to the most appropriate forms of promotion. This suggests that this portion of the population would not be unresponsive to encouragement to travel in a destination's low season. Again with the right approach, the problem of seasonality does not appear as insurmountable as traditionally thought.

4.4 Attracting visitors during the low season

An important feature of the survey was the question that asked how effective various inducements would be in prompting travel to a destination during its low season. The responses were measured using a five-point Likert scale and the mean response for each factor is shown in Table 4.23. The results of this question leave no doubt as to the most effective way of encouraging Auckland residents to travel to a destination during its low season.

Discounted accommodation rates were by far the most preferred promotional tool, followed by discounted transportation rates. The staging of a special event was the highest rated of the factors that did not rely on discounting. This result supports the earlier suggestion that special events may play a more important role in low season

domestic travel than in travel at other times of year. It is recognised that "events have unique advantages in overcoming seasonality" (Getz, 1997, p.53) and that they are effective in doing so: "researchers have been able to demonstrate the success of events in lengthening tourist seasons, or in creating secondary peaks in annual travel patterns" (Getz, 1997, p.54). Certainly special events can be a key component of a region's plan for lessening seasonality. There are cases where the effect of staging special events in the low season has been quite dramatic: Ritchie and Beliveau (1974, cited in Getz, 1997, p.54) "examined Quebec's famous Winter Carnival as a strategic response to seasonality. They concluded that the event, started in 1954 by the local business community, had succeeded in turning the traditional winter low season into the peak of the tourism year". It is significant that the staging of a special event ranked higher than all-weather attractions. This suggests that poor weather conditions at the destination may not be as insurmountable a problem as first thought. Not surprisingly, large-scale advertising campaigns ranked at the bottom of the list although perhaps its mean is actually higher than expected.

4.4.1 Kruskal-Wallis tests

Kruskal-Wallis tests were conducted to identify any significant differences of opinion between the sexes. The resulting significant p-values are shown in Table 4.24. From these results it can be determined that:

- Discounted transportation rates are seen as being significantly more effective by women than by men.
- All-weather facilities are seen as being significantly more effective by women than by men.
- The staging of a special sports event is seen as being significantly more effective by men than by women.
- Large scale advertising campaigns are seen as being significantly more effective by women than by men.

These results again reflect the income disparity between men and women. They also show that women are more likely to want all-weather facilities. This may be due to women being more likely to take children into consideration when travelling, or not being as outdoors activity-based as men. Not surprisingly, special sporting events are more attractive to men than to women. Women are traditionally more receptive to advertising than men so the last result is also not that surprising.

Similar tests were carried out to determine if there were any significant differences of

opinion between the age groups (see Table 4.25). From these results it can be determined that:

- Staging a special event is seen as being significantly more effective by people aged under 25.
- All-inclusive package tours are seen as being significantly more effective by people under 25.
- Large-scale advertising campaigns are seen as being significantly less effective by people over 66.

These results again show the tendency of New Zealand's current special events to appeal to people aged 25 and under. It may be that older age groups are attracted by special events but that they are not enough in themselves to attract this group during the low season. Getz (1997, p.263) states that "older, retired people are generally easier to attract in spring and autumn". This group could therefore be very useful in lengthening the high season rather than building up the low season.

Surprisingly, people aged under 25, traditionally thought to seek independent travel, are more likely to be attracted by package tours. People aged 66 and over said that they are less likely to be attracted by advertising. This is probably the case as this age group are more likely to have a reason for travelling, such as visiting friends and relatives or attending a personal or family event, that is not influenced by advertising.

Similar tests were carried out to identify any significant differences of opinion between the income groups. The resulting significant p-values are shown in Table 4.26. From these results it can be determined that:

- Discounted accommodation rates are seen as being significantly more effective by people with incomes under $50,000.
- Discounted transportation rates are seen as being significantly more effective by people with an income under $20,000.

These results are not surprising. Discounted accommodation rates are more attractive for all but the highest income groups. Discounted transportation rates are more attractive to people with incomes under $20,000 as this income group is least likely to own their own car.

4.4.2 Factor analysis

A factor analysis was carried out on the factors likely to prompt Auckland residents to

Table 4.24: Kruskal-Wallis test significant p-values for the effectiveness of various factors in prompting travel to a destination during its low season, by sex

Factor	p-value
Discounted transportation rates	0.013
All-weather attractions	0.019
Staging of a special sports event	0.000
Large-scale advertising campaigns	0.001

Table 4.25: Kruskal-Wallis test significant p-values for the effectiveness of various factors in prompting travel to a destination during its low season, by age

Factor	p-value
Staging of a special event	0.000
All-inclusive package tours	0.001
Large-scale advertising campaigns	0.000

Table 4.26: Kruskal-Wallis test significant p-values for the effectiveness of various factors in prompting travel to a destination during its low season, by income

Factor	p-value
Discounted accommodation rates	0.016
Discounted transportation rates	0.003

travel during the low season. Four Factors were identified, accounting for 75.9 percent of the sample (see Table 4.27). From these results it is possible to describe the new variables. Factor 1 measures the effectiveness of discounted costs. Factor 2 measures the ineffectiveness of large-scale advertising campaigns. Significantly Factor 3 measures the ineffectiveness of special events. Factor 4 measures the effectiveness of all-weather attractions.

4.4.3 Cluster Analysis

A hierarchical agglomerative cluster analysis was carried out on the factors likely to encourage Auckland residents to travel during the low season using Ward's method. This was to identify groups within the sample which responded similarly in terms of the Factor scores from section 4.4.2. The resulting clusters can then be used to identify groups within the population which would be useful for targeting purposes in niche marketing. The number of clusters that can be usefully described is determined by the dendogram (see Figure 4.12) which suggests that four clusters should be identified.

The clusters can be described as follows using the Factors established in the factor analysis. Cluster 1 is composed of respondents for whom Factor 3 was significantly important. This group views special events, both sporting and non-sporting as being ineffective in prompting low season travel. Cluster 2 is composed of respondents for whom Factor 2 was significantly important. This group viewed large-scale advertising campaigns as being ineffective in prompting low season travel. This may represent the older age groups who are less susceptible to advertising. Cluster 3 is composed of respondents for whom Factor 1 was significantly important. This group viewed discounted accommodation and transport as being effective in prompting low season travel. This group may represent the lower income groups for whom cost is the driving element of travel planning. Cluster 4 is composed of respondents for whom Factors 1, 2 and 3 were significantly unimportant. This group did not view discounted accommodation and transport as being effective in prompting low season travel. They did not view large-scale advertising or special events as being ineffective. This group may represent the higher income groups that would not be interested in discounts but might be attracted by appropriate special events.

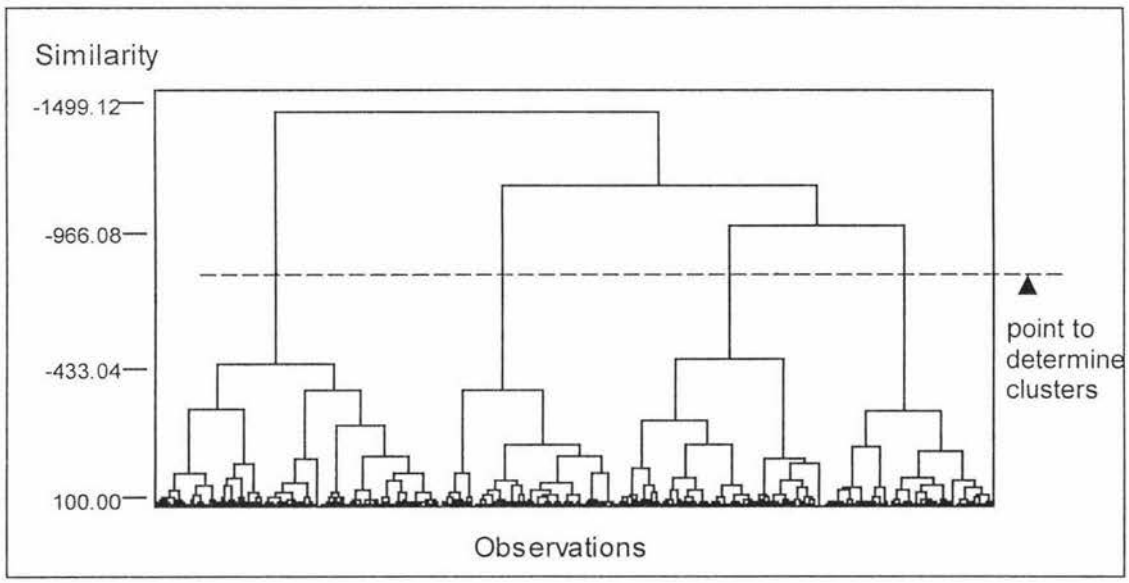
4.5 Factors affecting the choice of domestic destination

A further section of the questionnaire asked respondents what role certain factors played in how they chose a domestic destination. The factors listed attempted to cover

Table 4.27: Factors present in the factors likely to prompt Auckland residents to travel during the low season

	Factor		% of sample
Factor 1	effective	discounted accommodation discounted transport	16.7
Factor 2	ineffective	large-scale advertising	15.5
Factor 3	ineffective	special events special sporting events	12.7
Factor 4	effective	all-weather attractions	11.6

Figure 4.12: Dendogram showing clusters present in the factors likely to prompt Auckland residents to travel during the low season



all of the five primary sources of consumer information as shown in Table 4.28 however, travel does not lend itself to the fifth source, 'experiential sources'. Usually the operator is unable to provide the potential traveller with a trial of the travel experience although a tour (of a cruise ship, for example) may be possible. It is interesting that of the five primary sources of consumer information listed, the operator only has direct control over one of them: marketer-dominated sources. The effectiveness of direct promotion from the destination then, may be somewhat diluted by these alternative sources of information.

The question used five-point Likert scales and the mean rating for each factor is shown in Table 4.29. Not unusually, the ability to visit friends and relatives at a destination was the most influential factor in choosing a domestic destination. The second most influential factor was a recommendation from a friend or relative. This reiterates the major importance of consumer-dominated sources as a source of travel information. The fact that the third ranked factor is a previous visit to the destination suggests that memory is an important source of travel information for Auckland residents. It seems Auckland residents prefer to visit domestic destinations they are familiar with and are not looking for new experiences. Unless a destination is recommended by a friend or relative they are more content to visit a destination they have liked than to try one unknown to them. It would be interesting to compare this result with that of other New Zealand centres to see if it is Auckland's urban-living that leads residents to take the 'safe' option when travelling to escape the pressures of an urbanised environment.

The results suggest that a feature article in a newspaper's travel section, a travel magazine, or a television travel show are among the most effective forms of direct promotion a destination can undertake. This lends credence to the belief that the public see such articles as being more trustworthy than direct advertising. These results also suggest that a destination would be more prudent to spend its marketing budget on brochures rather than other forms of advertising, including television. This is reflected in the recent domestic tourism promotion by Tourism Auckland with its JAFA campaign (Thompson, 1999). Such a campaign can be more important for the publicity it attracts than for the image it creates.

Recommendations from travel agents are viewed as being worth even less than the destination's own advertising. The Internet is rated the least important factor in choosing a domestic destination. This is not surprising given the other sources of information that are more easily accessible to many people. It is important to note that only 500,000 New Zealanders have access to the Internet (Telstra Business 1999).

Table 4.28: The five primary sources of consumer information

1. *Memory* of past searches, personal experiences, and low-involvement learning (internal information)
2. *Marketer-dominated sources*, such as advertising, personal selling, etc.
3. *Consumer-dominated sources*, such as family and friends
4. *Neutral sources*, such as *Consumer Reports* and various state and local government publications
5. *Experiential sources*, such as inspections or product trials

Source: Rotzoll and Haefner (1996, p.120).

Table 4.29: Factors affecting the choice of a domestic holiday destination (ranked by mean in descending order of influence)

Factor	Mean
Visiting friends and relatives	2.3664
Recommendation from a friend or relative	2.5492
Previous visit to the destination	2.5668
Featured in newspaper/magazine travel article or television show	2.9446
Brochure from the destination	3.0365
Television advertising of destination	3.3592
Other advertising of destination	3.5186
Recommendation from a travel agent	3.5513
Information gained from an Internet site	4.0824

Table 4.30: Kruskal-Wallis test significant p-values for factors affecting the choice of domestic holiday destination, by sex

Factor	p-value
Visiting friends and relatives	0.012
Featured in newspaper/magazine travel article or television show	0.003
Brochure from the destination	0.050
Television advertising of destination	0.000
Recommendation from a travel agent	0.011

This result is, however, contrary to some overseas markets where there is growing use of the Internet in the tourism sector (Fau 1996; O'Connor 1999). New Zealand destinations should have a strong presence on the Internet, but it seems that at this point in time they should be tailored more to an overseas market. It is likely that the Internet would rate higher for New Zealanders choosing an overseas destination.

4.5.1 Kruskal-Wallis tests

Kruskal-Wallis tests were conducted to identify any significant differences of opinion between the sexes (see Table 4.30). From these results it can be determined that:

- Visiting friends and relatives is significantly more important for women than for men.
- A recommendation from a travel agent is significantly more important to women than to men.
- A brochure from the destination is significantly more important to women than to men.
- Television advertising is significantly more important to women than to men.

These results provide a clear image of just how males and females are influenced in their selection of a domestic destination. Women appear to be more influenced by advertising. This suggests that tourism promoters would be wise to tailor their advertising more towards women. In doing so they need to recognise the differences between the sexes in their responses to different methods of advertising. Clark, Brock and Stewart (1994, p.117) found that men tend to generally be more receptive to graphical methods of advertising while women tend to be more receptive to verbal methods. They found that "practitioners might benefit from expressing information in alternative ways when targeting males and females". Women's preference for visiting friends and relatives could form a useful theme in future advertising campaigns.

Kruskal-Wallis test were conducted to identify significant differences between the age groups for this question (see Table 4.31). The variable of age produced the greatest number of significant differences. From the results it is possible to identify which factors have significantly different results for each age group. It can be determined that:

- A previous visit to the destination is significantly less important for people aged between 46 and 55.
- Visiting friends and relatives is significantly less important for people aged between 46 and 55.
- Visiting friends and relatives is significantly more important for people aged over 66.

- A recommendation from a friend or relative is significantly more important for people aged under 25.
- Television advertising is significantly less important for people aged over 66.
- Information from an Internet site is significantly less important for people aged over 66.
- Other forms of advertising are significantly less important for people aged over 66.

These results illustrate the inefficiency of mass marketing a destination rather than targeting marketing to different age groups. That people under 25 are significantly more influenced by a recommendation from a friend or a relative shows how important it can be for this age group to visit 'socially acceptable' or 'trendy' destinations. Clearly this age group can have the recognition/status factor from Table 4.6 as an element of its motivation to travel. Any form of advertising is shown to be significantly less important for the highest age group while visiting friends and relatives is significantly more important for this group. Any future advertising directed at this age group could use this information, perhaps promoting the idea of catching up with friends and relatives more than the features of the region itself. Kruskal-Wallis tests were also conducted to identify any significant differences of opinion between income groups for this question. As none of these p-values are less than 0.05, it is possible to conclude that income does not have a significant influence on the methods used to choose a domestic holiday destination.

4.5.2 Factor Analysis

A factor analysis was carried out on the factors that determine the timing of domestic travel. Three Factors were identified, accounting for 66.7 per cent of the sample. Their characteristics are shown in Table 4.32. From these results it is possible to describe the new variables. Factor 1 measures the importance of promotion that is undertaken by the destination. Factor 2 measures the unimportance of recommendations. This is an interesting result given the widespread belief in the importance of word-of-mouth as a form of promotion. Factor 3 measures the importance of prior experience of the destination, either directly or through a contact living there.

4.6 Summary

From these results it is possible to identify the most and least seasonal groups of Auckland residents. Age was shown to be the most important differentiating factor in

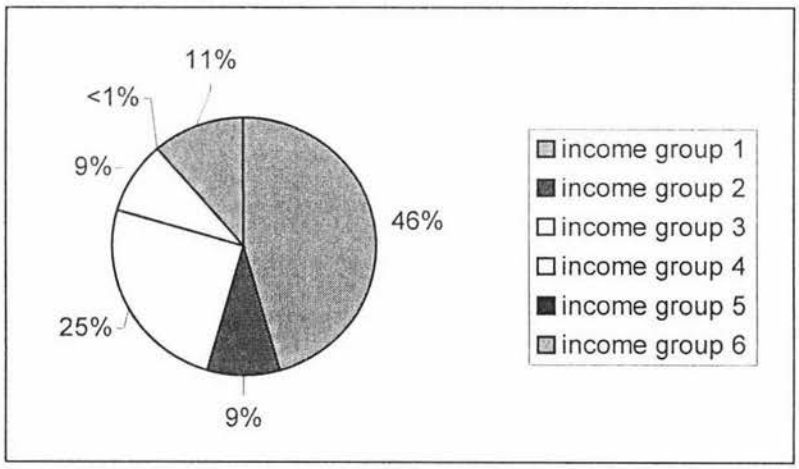
Table 4.31: Kruskal-Wallis test significant p-values for factors affecting the choice of a domestic holiday destination, by age

Factor	p-value
Visiting friends and relatives	0.018
Recommendation from a friend or relative	0.001
Previous visit to destination	0.026
Television advertising of destination	0.005
Other advertising of destination	0.022
Information gained from an Internet site	0.000

Table 4.32: Factors present in the factors influencing the timing of domestic holidays

	Factor		% of sample
Factor 1	important	brochure from the destination television advertising of destination information from an Internet site other advertising of destination featured in newspaper/magazine travel article or television show	33.1
Factor 2	unimportant	recommendation from a friend/relative recommendation from a travel agent	17.1
Factor 3	important	previous visit to the destination friends/relatives at the destination	16.4

Figure 4.13: Income distribution of age group 1

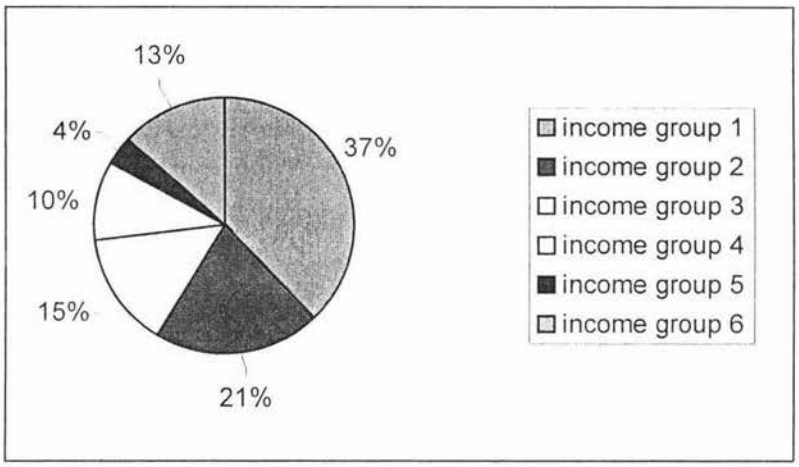


these results and so this is the factor which defines these groupings. Age group 1 (those aged 18 to 25 years) was found to be the most seasonal and age group 6 (those aged over 66 years) to be the least. Age group 1 is least likely to think that Northland is a great destination at any time of year. Weather conditions are significantly more important for this group and they also want beautiful natural scenery and low accommodation/transport costs. They tend to travel domestically in December and January. They account for 8.70% of the sample and approximately 9.96% of the population (Statistics New Zealand, 1999, p.17). Their income distribution is shown in Figure 4.13. Age group 1 is the least likely to visit an area during its low season. Their main reasons for travelling to Northland are holiday, followed by visiting friends and relatives. Their most effective low season encouragements are discounted accommodation and special events. This group is significantly more likely then any other to be attracted by special events during the low season. They are also significantly more likely to be attracted by package tours in the low season. They do not want special sporting events or large-scale advertising.

In terms of choosing a destination, age group 1 is most influenced by friends or relatives living at the destination, a recommendation form a friend or relative, or a previous visit to the destination. In fact, they are significantly more likely than any other group to rely on a recommendation from a friend or relative. They are least moved by travel agent recommendations and Internet sites. The timing of their travel is most determined by their work schedule, public holidays, accommodation/transport prices, and family occasions. The areas of Northland most visited by age group 1 are: Whangarei, Paihia, Russell, and Kerikeri. Members of age group 1 tend to stay in caravan or camping sites or with friends and relatives. Members of age group 1 usually spend between one and six nights in Northland (40.63% usually stay for 1 to 3 nights, 46.88% usually stay for 4 to 6 nights). The proportion that visit Northland every year is 47.06%. The proportion that visit Northland at the same time every year is 50%. Those that do not probably still travel during the summer season if not over exactly the same dates.

Age group 6 is the most likely to think Northland is a great destination at any time of year. This group is most attracted to beautiful natural scenery, low accommodation and transport prices, fine weather, and peace and quiet. They tend to travel domestically in October, December, and January. They account for 16.48% of the sample and approximately 10.95% of the population (Statistics New Zealand, 1999, p.17). Their income distribution is shown in Figure 4.14. Age group 6 is the least likely

Figure 4.14: Income distribution of age group 6



to visit an area during its high season. They are the most likely to visit an area during its low season. Their main reasons for travelling to Northland are holiday, followed by visiting friends and relatives. Their most effective low season encouragements are discounted accommodation, discounted transport, package tours, and all-weather attractions. They do not want large scale advertising, special sporting events, or special events. Indeed, large scale advertising is significantly less important to this age group than any other. When choosing a destination this group is most influenced by (in order of frequency) friends or relatives at the destination; a previous visit to the destination; a recommendation from a friend or relative; a brochure from the destination; and a newspaper or TV article. They are least affected by the Internet; other advertising; and TV advertising. The timing of this group's travel is directly determined by accommodation and transport prices, family occasions, and the weather conditions at the destination. In contrast, the factors with the least impact on their choice of destination are: public holidays; their work schedule; and special sporting events. When in Northland age group 6 visits Kerikeri, Paihia, Russell, and Whangarei. They tend to stay in motels or with friends and relatives and usually spend between 4 to 6 nights in Northland (38.2%). The proportion of age group 6 that visits Northland every year is 56.76%. The proportion that visits Northland at the same time every year is 31.81%.

5 Survey of Auckland residents: Northland section

5.1 Introduction

This section of the study aimed to examine the travel habits of Auckland residents with regard to the Northland region. Auckland residents were chosen as the sample population as they are Northland's largest visitor market. The impact of this population on Northland's tourism industry - in particular its impact in terms of seasonality – is vital as the effect of one major market's travel habits is often viewed as the principal driver of the conditions in the local market. Therefore this section discusses Auckland residents from the survey examined in chapter five to provide a more detailed profile of the relationships of travel habits, activity patterns and the key factors associated with seasonality (such as climate) in their determination of their Northland travel patterns.

The survey examined issues such as respondents' Northland travel patterns, accommodation used, and areas visited. It also studied the use of the Visitor Information Network and knowledge of Northland's Twin Coast Discovery Highway. Finally it looked at Northland's competitiveness as a domestic destination and required respondents to agree or disagree with a number of statements about the region. Since the methodology and rationale of the survey were discussed in chapter five, there is no need to reiterate it here. Of the 548 Auckland residents who responded to the survey, 312 (57%) had travelled to Northland during the last year and were therefore eligible to complete the Northland section of the questionnaire. This sub-sample were separated out in the data set and subjected to detailed analysis while the main sample of 548 residents was used as a basis for comparison.

5.2 Demographics

The demographic profile of the Northland sample is very similar to that of the entire sample which is outlined in Table 5.1. The similarity in the demographics suggests that Northland is a domestic destination with mass appeal. That is, it does not attract any particular sex, age level, or income level more than any other. While it is possible to say that the results suggest that Northland visitors are slightly more likely to be female, middle aged, and with an income under $40,000, these tendencies are not significant enough to affect the region's broad marketing plan. These results compare quite favourably with those of Page and Forer's (1998a) Northland visitor survey shown in Table 5.2. Although Page and Forer use different age groups, the general picture is similar except for a higher representation in the younger age groups. There are two main reasons for this. One is

Table 5.1: Basic demographics of respondents

Characteristic	Number	% of Northland sample	% of total sample
Sex			
Male	135	43.27	41.42
Female	177	56.73	58.58
Age (years)			
Under 25	34	10.90	8.97
26 – 35	61	19.55	18.68
36 – 45	75	24.04	21.06
46 – 55	74	23.72	22.71
56 – 65	29	9.29	12.09
Over 66	38	12.18	16.48
Annual income ($)			
Under 20,000	67	21.47	23.80
20,001 – 30,000	43	13.78	17.08
30,001 – 40,000	61	19.55	18.23
40,001 – 50,000	32	10.26	12.09
50,001 – 60,000	25	8.01	7.87
Over 60,000	63	20.19	20.92
Location			
Auckland	191	61.22	63.69
North Shore	121	38.78	36.31

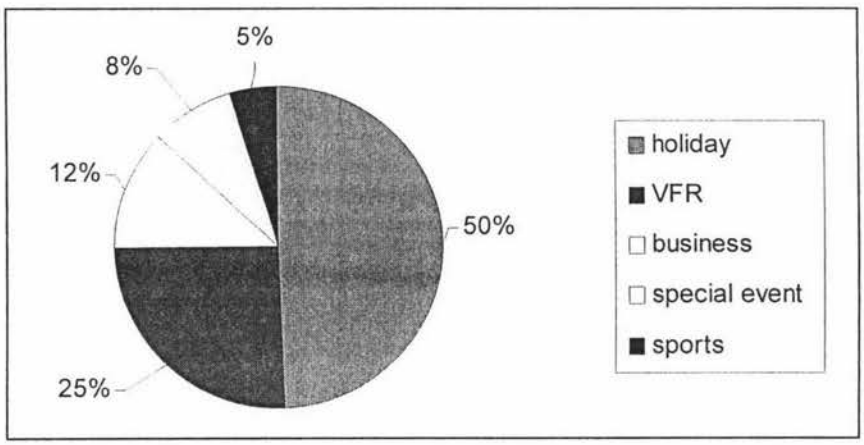
Table 5.2: Demographic profiles from Northland visitor survey

Age range	%
Under 20 yrs	6.84
20 –29	34.45
30 – 39	19.71
40 – 49	14.75
50 – 59	12.47
Over 60 yrs	11.80

Income	%
Under $20,000	21.3
$20 –29,999	17.5
$30 – 39,999	21.8
$40 – 49,999	14.8
$50 – 59,999	9.8
Over $60,000	14.8

Source: Page and Forer (1998a, pp. 331,333).

Figure 5.1: Reasons given by respondents for travelling to Northland



that the postal survey for this research was sent to people on the electoral role who therefore had to be at least 18 years old, and secondly, the younger age groups may be less inclined to respond to a postal survey as they may not feel that the topic is relevant enough to them to respond to it. The income distribution from the two surveys is also similar, Page and Forer's (1998a) results show a slightly more centralised pattern of distribution with not as many responses at either extreme.

5.3 Reasons for travelling to Northland

The first question in the Northland section asked respondents their main reason for travelling to Northland and the results are shown in Figure 5.1. Not surprisingly, half the respondents gave their main reason for travelling to Northland as 'holiday'. Northland is seen as New Zealand's main sun-sand-surf holiday destination and this result seems to support that perception. Holiday travellers tend to be the market most strongly characterised by seasonal demand. This high proportion of holiday travellers suggests that Northland's seasonality problems may be difficult to lessen.

Visiting friends and relatives (VFR) was another major reason for travel, as it tends to be in all domestic travel. VFR travel can be "variable and highly seasonal" (Page and Forer, 1998a, p.297). This type of travel is also "extremely price sensitive and adversely affected by poor weather conditions" (Page and Forer, 1998a, p.297). Again, Northland's reliance on this market may make the problems associated with seasonality more difficult to lessen.

Business travel accounts for 12% of travel to Northland. Company conferences and meetings may be a large component of this figure and this aspect of business travel should be promoted. It would be beneficial to the region to encourage business travel as "the business travel market is characterised by relative lack of seasonality" (Witt, Brook, and Buckley, 1991, p.39). Indeed, it has been said that "meeting and convention travel often favours off-peak seasons, both to secure lower costs for participants and to ensure sufficient space in facilities" (Getz, 1997, p.54). It is also beneficial to target the business travel market as this form of traveller has the highest rates of expenditure per day and per trip as seen in Table 5.3.

Only 8% of respondents identified a special event as their main reason for travelling to Northland. This is surprising given the growing reliance on special events to attract visitors and extend an area's high season. It may be that this low figure is due to a perceived lack of worthwhile special events rather than a lack of willing to travel for special

events. If so, then the promotion of special events would need to be reviewed to ensure good awareness of Northland's events.

5.3.1 Kruskal-Wallis tests

Kruskal-Wallis tests were conducted to identify any significant differences between the sexes concerning reasons for visiting Northland. The resulting significant p-values are shown in Table 5.4. From these results it can be determined that:

- Men are significantly more likely than women to visit Northland on business.
- Women are significantly more likely than men to visit Northland for VFR travel.

This first result is not unexpected given the higher employment levels of men and therefore there increased likelihood to travel for business. The second result is interesting and suggests that women may not be as seasonal as men in their travel. These results may guide Northland in tailoring its promotional activities to the preferences of each sex.

Kruskal-Wallis tests were conducted to identify any significant differences between the age groups concerning reasons for visiting Northland. The resulting significant p-values are shown in Table 5.5. From these results it can be determined that:

- People aged between 46 and 55 are significantly more likely than others to visit Northland on business.
- People aged under 25 are significantly more likely than others to visit Northland to attend a special event.

The first result is not surprising as this age group is more likely to be employed at a senior level and therefore undertaking business travel such as attending conferences. The second result is surprising as special events might have been thought to have a wider appeal than just the youngest age group. This may be a reflection of Northland's special events tending to have a youth focus.

Kruskal-Wallis tests were also conducted to identify any significant differences between income levels for reasons for visiting Northland. The resulting p-values showed that income had a significant effect on just one area. The test on attending a special event produced a p-value of 0.026 and showed that respondents with an income over $40,000 are significantly less likely than others to visit Northland to attend a special event.

This result supports the above finding that people aged under 25 (and therefore with a lower average income) are the most likely to visit Northland for a special event. This is an interesting result given that people with incomes over $60,000 were the most likely to be encouraged by a special event to travel in a destination's low season. This suggests that

Table 5.3: Domestic visitor expenditure by reason for visit 1989/90

Reason	Expenditure per person per day	Expenditure per trip
Holiday	$ 64	$348
VFR	$ 42	$160
Business	$118	$348
Sports/hobbies	$ 78	$199
Other	$ 52	$200
Average	$ 62	$249

Source: Collier and Harraway (1997, p.130).

Table 5.4: Kruskal-Wallis test significant p-values for reason for Northland travel, by sex

Factor	p-value
Business	0.001
VFR	0.023

Table 5.5: Kruskal-Wallis test significant p-values for reason for Northland travel, by age

Factor	p-value
Business	0.013
Attend a special event	0.038

Table 5.6: Factors present in the reasons for travelling to Northland

	Opinion		% of sample
Factor 1	travels for does not travel for	- holidays - work	25.5
Factor 2	does not travel for	- special events - sporting events	23.5
Factor 3	travels for	- visiting friends and relatives	22.8

the low occurrence of travel to Northland to attend a special event amongst the higher income groups is due to a lack of suitable events rather than a lack of inclination. This is supported by the review of Northland's current special events in section 3.4.1 which showed that only recently has the region been holding events that appeal to the higher income groups (such as outdoor recitals or food and wine festivals). Again, awareness of these events may be the limiting factor here.

5.3.2 Factor analysis

A factor analysis was conducted on the reasons for travelling to Northland to determine which of the factors tended to have correlated responses. This process reduces the dimensions of the data and compresses the original five variables into a smaller number of variables to make them more manageable. Three new variables, or Factors, were identified, accounting for 71.9% of the sample. Table 5.6 shows their characteristics.

From these results it is possible to describe the new variables. Factor 1 measures the importance of holidays as a motivation. This grouping shows that people who travel primarily to Northland for a holiday are not likely to have travelled there for business. Factor 2 measures the importance of special events. This shows that special events of any kind tend to be grouped together in a person's consideration of a destination. Factor 3 measures the importance of visiting friends and relatives. This shows that VFR is a strong enough motivation to stand alone, no other factor is grouped with it as a consideration.

5.4 Pattern and timing of Northland travel

Respondents were asked how many times they had visited Northland in the last year to try to gauge the level of repeat visitation to Northland (see Figure 5.2). The majority of respondents had visited Northland one to three times in the last year. It might have been expected that respondents would have visited Northland more often than that given Auckland's proximity to the region and the recent growth of short-break domestic holidays. It may be that Auckland's short-break market visits Rodney district, the region just south of Northland. It is possible that the perception of Auckland residents is that Rodney's landscape is similar to that of Northland and that therefore there is no need to take the extra time and cost needed to travel any further north. This will be especially true of travellers who are looking for a sun- sand-surf holiday and are not interested in Northland's historical attractions and other distinguishing features. Respondents were asked whether they visited Northland every year and 54% said they did. From this result

the Northland region seems to have a reasonably high level of repeat visitation from Auckland, no doubt partly due to the ease of reaching the region from Auckland with a private vehicle.

The respondents that did visit Northland every year were then asked if they visited the region at the same time every year. Only 31% said that they did. The high percentage of respondents that do not visit Northland at the same time every year suggests that the majority of respondents are not bound by 'traditional' visitation patterns but rather may be open to change in the timing of their visits. These respondents may be able to be encouraged to move their visitation to the shoulder or low seasons.

These same respondents were then asked during which months they visited Northland. The results appear in Figure 5.3. The responses formed an expected pattern of visitation for the Northland region given its image as a summer destination. The rise in visitation in June and July is pertinent. This rise during the rugby season may represent the respondents who nominated 'sports' as their reason for travelling to Northland. It may also be that there is already a proportion of travellers who recognise Northland as a year-round destination and value the lack of crowds at this time.

It is interesting to compare the timing of respondents' Northland travel with the timing of respondents' general domestic travel. The pattern of general domestic travel is again shown in Figure 4.8. This comparison shows that Northland experiences a longer summer season of Auckland visitors than the rest of the country. This is shown by the fact that the figures for February, March and April in Figure 5.3 are more similar to each other than for the same period in Figure 4.8. Northland's domestic visitation levels do not exhibit the steady decrease towards winter that can be seen in the national levels of Figure 4.8. It also has a steadier build-up to the summer season without the sudden rise in December seen in other regions. Northland's visitation can also be seen to decrease over winter to a greater degree than the rest of the country. This is not surprising given that winter is the high season for some regions.

The second comparison to be made is with the months nominated by Northland's tourism-based businesses as being their busiest (see Figure 6.7). The general pattern shown by Figures 4.3 and 6.7 is broadly similar but it is interesting to note the many differences. Figure 6.7 shows a much busier mid-to-late summer period over February and March than is represented in by the domestic visitation in Figure 4.3. This suggests that this mid-to-late summer period is composed partly of international visitors. The winter season is shown by businesses as being quieter than the visitation levels of Figure 4.3 seem to

Figure 5.2: Number of times respondents have visited Northland in the last year

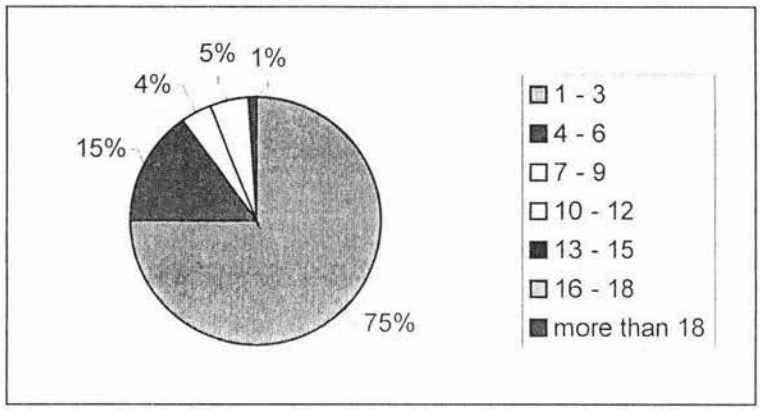


Figure 5.3: Months of the year during which respondents travel to Northland

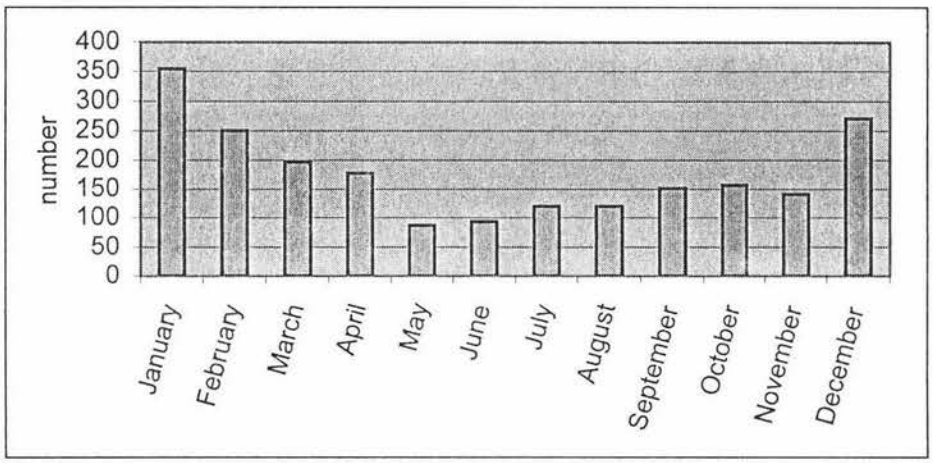


Figure 4.8: Months during which respondents usually undertake domestic travel

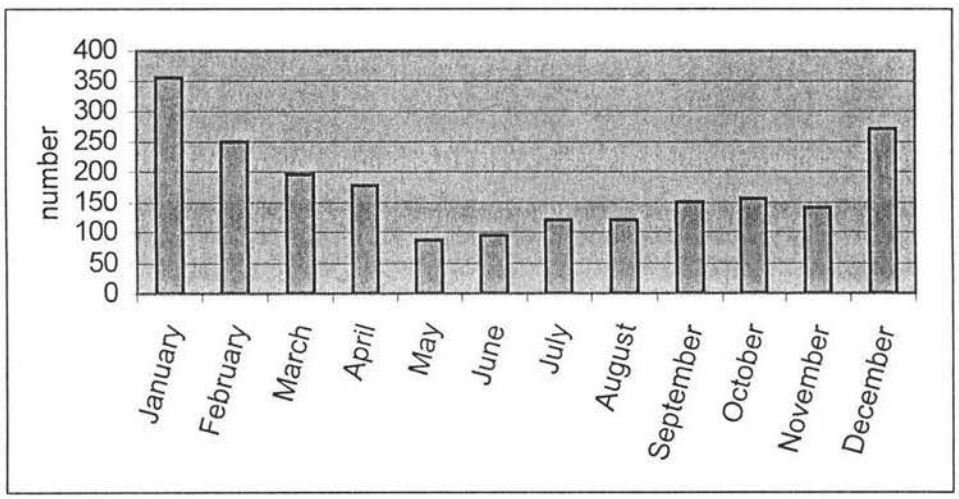


Figure 6.7: Busiest months for Northland businesses

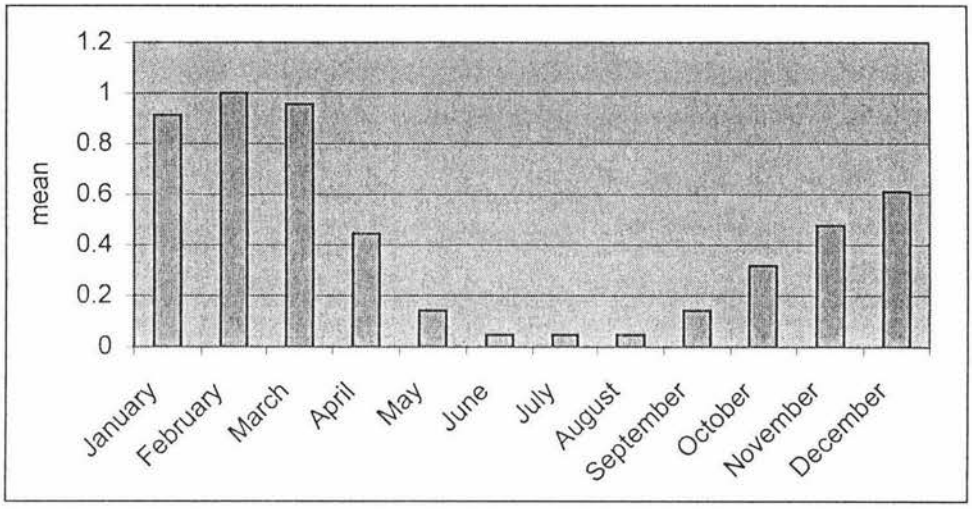
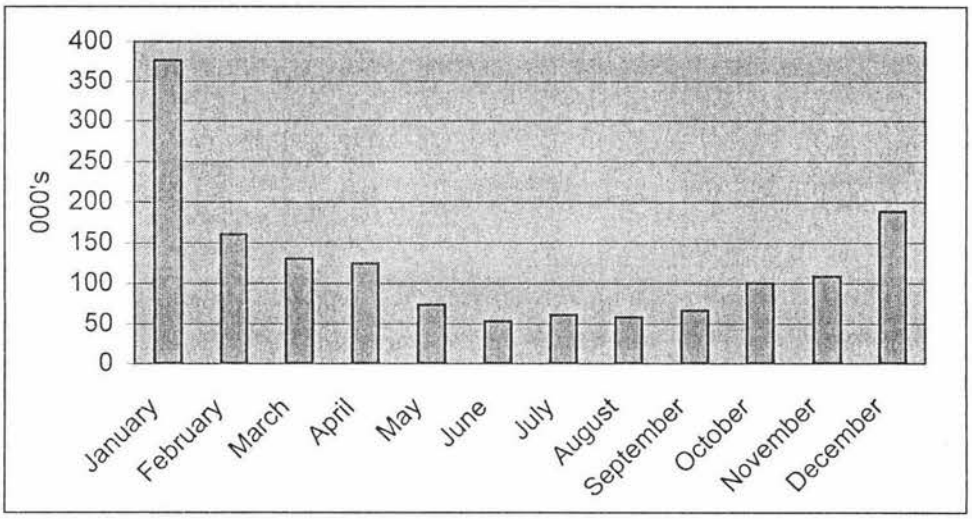


Figure 5.4: Total guest nights: Northland area – 1998



Source: Statistics New Zealand (1999a, p.2).

Table 5.7: Factors present in the months respondents travel to Northland

	Characteristics			% of sample
Factor 1	travels in	-	May	22.8
		-	June	
		-	July	
		-	August	
		-	September	
Factor 2	does not travel in		October	16.7
		-	November	
Factor 3	travels in	-	February	13.4
		-	March	
Factor 4	travels in	-	January	13.4
		-	April	

suggest. This may be because winter travellers to the region are more likely to be visiting friends and relatives and so have a negligible financial impact on local businesses, particularly tourism attractions or activities. There is also a drop in domestic travel to Northland in November which is not represented by the businesses in Figure 6.7.

The third comparison is with the total guest nights spent in Northland as recorded by the Commercial Accommodation Monitor. This survey is only of commercial accommodation so the accommodation used by the VFR market is not represented. The distribution of the total guest nights experienced by the region is shown in Figure 5.4. Figure 5.4 shows a similar pattern to the months Auckland residents undertake domestic travel shown in Figure 4.8. It may be that "tourists" arrive in January and stay in commercial accommodation. Holiday home owners avoid this period and arrive in February/March. One third of all homes in Paihia belong to absentee owners. This, plus the VFR market, can result in the somewhat misleading image of Northland's visitation pattern presented by Figure 5.5.

5.4.1 Factor Analysis

A factor analysis was carried out to determine groupings present in the responses to 'the months during which respondents travel to Northland'. Four Factors were identified, accounting for 71.9% of the sample. Their characteristics are shown in Table 5.7. These results make it possible to describe the new variables. Factor 1 measures the importance of travelling over winter. The Northland region appears to already have a section of the Auckland population that visits the region during its low season. The size of this first group can be partly explained by the fact that it includes two of the main school holiday periods. This grouping may also contain much of the travel of the older respondents. Factor 2 measures the importance of travelling in the pre-Christmas period. This is clearly not a popular time for domestic travel as discussed earlier. While there is movement of people going home for Christmas, this does not compensate for the lack of other forms of travel at this time. Factor 3 measures the importance of travelling in late summer. Factor 4 measures the importance of travelling in early summer and early autumn. These two groups represent Northland's traditional market and their travel to the region between January and April. This gives an impression of the main groupings of travel patterns already present in the population. They can be used to determine which groups to target and the extent of the shift in travel patterns needed to give the desired reduction in seasonality.

5.5 Sample's length of stay in Northland

Respondents were asked how many nights they usually spent in Northland per visit (see Figure 5.5). Respondents were found to have a mean length of stay in Northland in the upper end of the '1 to 3' range which can be approximated to 3 nights. This is significant considering that Page and Forer (1998a, p.338) found the average length of stay to be 6.2 nights but then went on to argue that the average length of stay "for holidays under 31 days is 4.12 nights". North (1990) also found the mean length of stay to be 4.1 days. Clearly Northland is currently a short-break domestic location for Auckland residents. The Commercial Accommodation Monitor of June 1999 found that the average length of stay in Northland in June 1999 was 2 nights (down from 2.3 nights in June 1998). This survey is of commercial accommodation operators and does not take into account accommodation used by the 'visiting friends and relatives' market. The substantial increase of the commercial average of two nights to the three or four nights of the other surveys shows how important this private accommodation is within the region.

The '4 to 6' night grouping is also substantial but stays in Northland of seven nights or more are clearly not usual amongst Auckland residents. This is not unexpected as Auckland's proximity to Northland can make several short trips throughout the year more convenient than one extended stay. This result also reflects the opportunities for travelling presented throughout the year. For those restricted by work and schooling, short breaks away, such as just a weekend or a public holiday long weekend, can be undertaken several times over a year while an extended travel period can usually only be taken once. For these short breaks proximity to the destination can be one of the most important considerations. It may be that Auckland residents take short breaks to Northland throughout the year and then spend their extended travel time elsewhere as the time needed to get there becomes a proportionately smaller part of the whole travel period.

5.5.1 Kruskal-Wallis tests

Kruskal-Wallis tests were conducted to determine whether sex, age, or income were significant factors in the number of nights spent in Northland per visit. The only one that proved to be a significant factor was age with a p-value of 0.000. This extreme p-value showed just how important age is as a differentiating factor. This is illustrated in Figure 5.6 which shows that people aged over 66 usually spend a significantly greater number of nights in Northland. It is clear from this result that there is a direct relationship between length of stay and available leisure time. Respondents over the age of 66 have the

Figure 5.5: Number of nights respondents usually spend in Northland

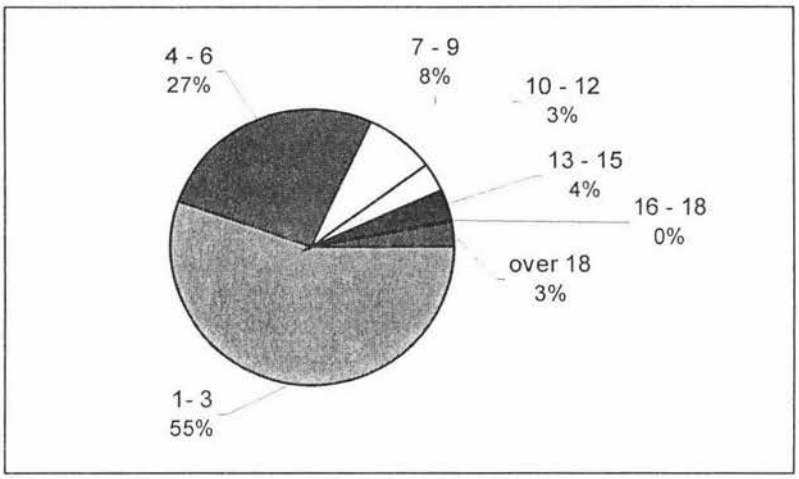


Figure 5.6: Means of the usual number of nights spent in Northland by age

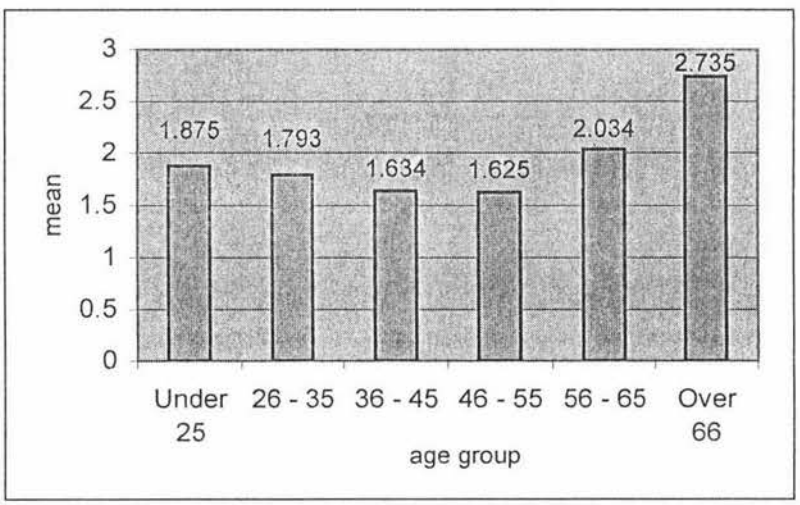
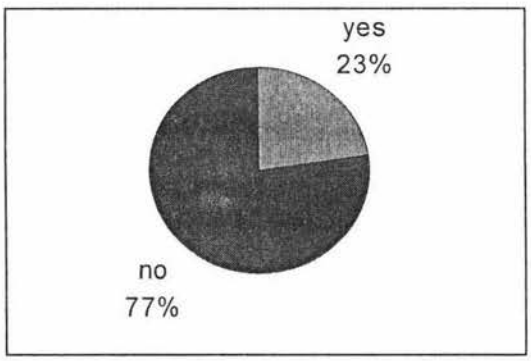


Figure 5.7: Has length of stay in Northland ever been affected by the weather?



longest length of stay while in Northland. This is not surprising given the increased amount of leisure time this group gains with retirement. Respondents aged between 36 and 55, perhaps those most constrained by work and family commitments, have the shortest length of stay.

5.5.2 Length of stay and weather

Respondents were asked whether their length of stay in Northland had ever been affected by the weather (see Figure 5.7). The fact that 77% of respondents had not had their length of stay in Northland affected by the weather again suggests that either most respondents travel during the predictable fine weather of summer or are prepared for changeable weather if travelling at other times. Disruption of Northland travel plans due to the weather has been a contentious topic of late as parts of the region experienced major flooding. As a result, it might have been expected that proportion of respondents who had had their plans disrupted might have been higher, either through actual experience or through changing their plans because of media coverage.

5.6 Accommodation used while in Northland

Respondents were asked which form of accommodation they usually stayed in while they were in Northland and the results are shown in Figure 5.8. These results give a number of interesting descriptions of Auckland resident's role in Northland's tourism industry. Of particular interest is the fact that the majority of accommodation types used are low-cost in nature. The combined usage of VFR accommodation, holiday homes or baches, caravan or camping sites, timeshares, and backpacker hostels comes to 55%. This suggests that Northland is not attracting high-spending Auckland visitors which means that their expenditure in other areas of their Northland is probably not very high either. Motels are the largest single grouping on 27%, a result which is not likely to be dissimilar from other regions of New Zealand. This in part, represents the large number of families and older people that visit Northland.

An area of accommodation that has the potential for growth is the use of hotels and luxury lodges which currently combine to only a 10% share of accommodation types used. This low rating reflects the perceptions of Northland as a casual, outdoors-based, low expenditure destination. And with the majority of Auckland resident's visits being only 1 to 3 nights, there is a likelihood that they may choose budget accommodation that they may not be totally happy with as they know they will not be there for too long. Changing perceptions of Northland and attracting high spending visitors from the Auckland region

Figure 5.8: Forms of accommodation usually used by respondents while in Northland

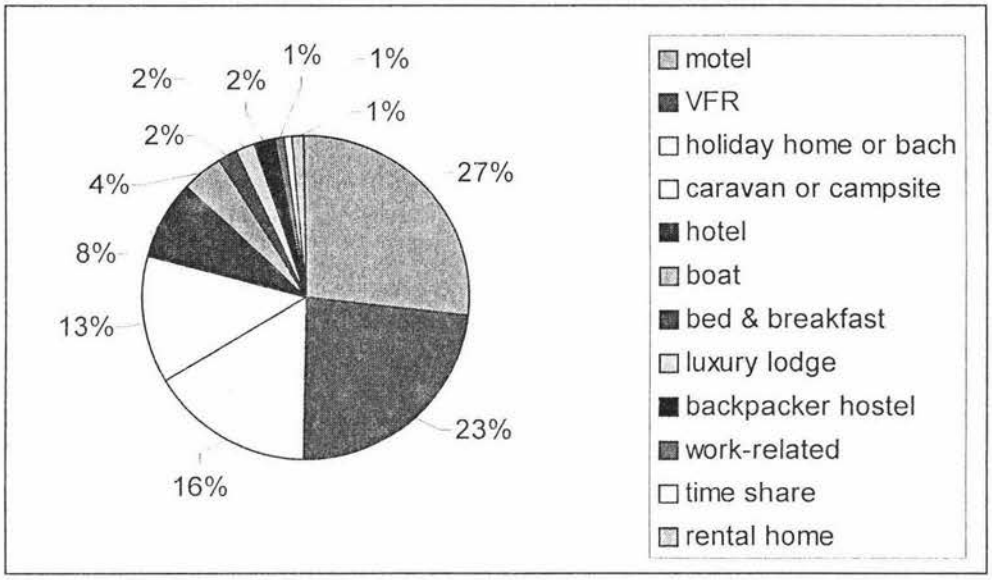


Table 5.8: Kruskal-Wallis test significant p-values for the form of accommodation usually used in Northland by age

Accommodation	p-value
Caravan/camping site	0.000
Motel	0.013

Table 5.9: Factors present in the accommodation used while in Northland

	Opinion		% of sample
Factor 1	does not use does not use	caravan/camping site other	13.4
Factor 2	uses does not use	friends and relatives bed and breakfasts	12.7
Factor 3	uses uses	hotel luxury lodge	12.6
Factor 4	uses does not use	boat backpackers hostel	10.9
Factor 5	does not use	holiday home/bach	10.9

may be quite a challenge. Business travellers could be a useful group to target in this, particularly the conference trade.

5.6.1 Kruskal-Wallis tests

Kruskal-Wallis tests were carried out to determine whether there were any significant differences in opinion between the sexes, the age groups, and the income groups. It was found that sex and income are significant factors in the choice of accommodation in Northland. Age was a significant factor, however, and the resulting significant p-values are shown in Table 5.8. From these results it can be determined that:

- People aged under 35 are significantly more likely to use a caravan/camping site.
- People under 35 are significantly less likely to use a motel.

These results are predictable as the younger age groups tend to use caravan/camping sites both for economic and social reasons.

5.6.2 Factor analysis

A factor analysis was carried out on the accommodation used while in Northland. Five Factors were identified, accounting for 60.3% of the sample. Their characteristics are shown in Table 5.9. From these results it is possible to usefully describe the new variables. Factor 1 represents the more conservative, possibly older travellers. They do not use caravan/camping sites or any form unusual enough to come under the heading of 'other'. Factor 2 represents the VFR traffic. This Factor does not include bed and breakfast usage. Factor 3 represents the more expensive forms of accommodation such as hotels and luxury lodges. Factor 4 shows that respondents that stay on boats while in Northland are very unlikely to use backpacker hostels. This may be because this Factor represents the middle age groups and because most people who stay on boats are likely to own that boat, something that does not apply to backpacker hostel customers. Factor 5 represents those travellers to Northland that do not use a holiday home or bach but may use any other form of accommodation.

5.7 Areas of Northland visited

Respondents were asked which areas of Northland they had visited (see Figure 5.9). This is a much more even distribution of visitation in Northland than might have been expected. International visitation patterns show a much greater focus on the main tourist areas (see Figure 5.10). The even distribution seen in Figure 5.10 may be a result of Auckland residents' familiarity with the region. Domestic travellers are more likely to visit a region's

Figure 5.9: Areas of Northland visited by respondents

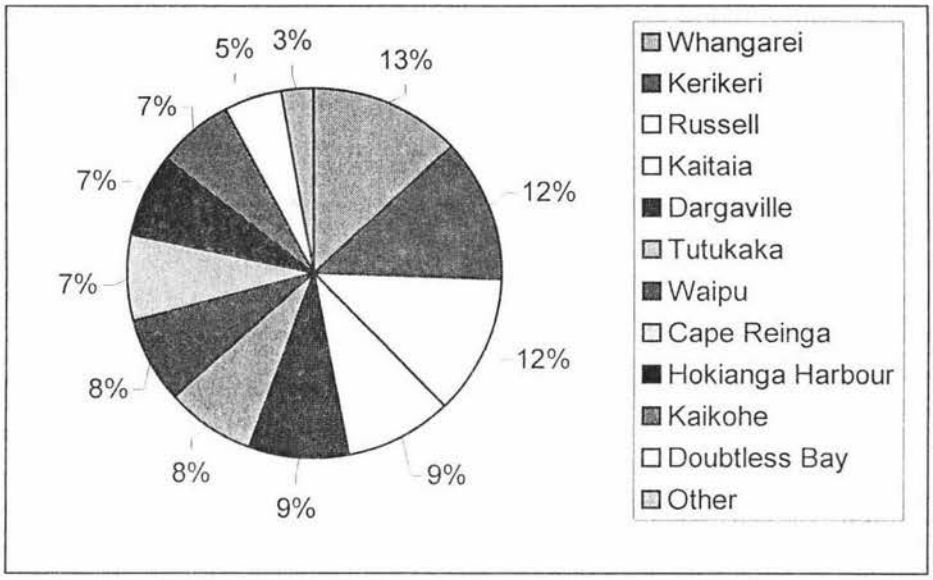
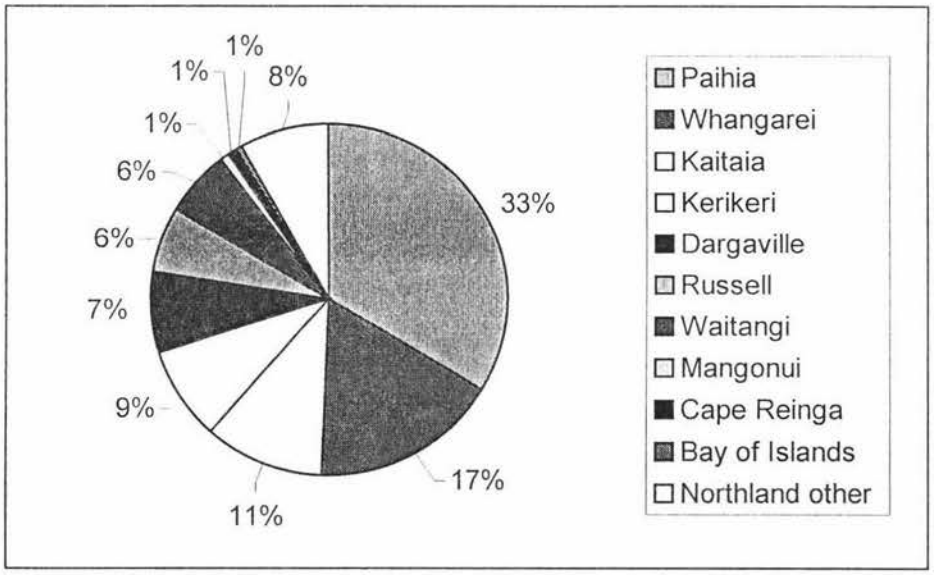


Figure 5.10: Number of visits by location visited



Source: New Zealand Tourist and Publicity Department (1989, p.10).

more remote areas because they will usually have more time available than international visitors and because they may feel more comfortable venturing off the main routes than international visitors. Auckland residents in particular are more likely to be familiar with Northland and therefore venture out of the main tourist centres and off the main tourist routes in search of new areas.

Page and Forer (1998a, p.327) presented a more expected pattern of visitation in the Northland region as seen in Map 5.1. This result shows the very high concentration of visitation from Orewa through to the Bay of Islands. It also shows the secondary route up through Cape Reinga and the other touring routes used. This pattern is due to the fact that domestic visitors made up only 47.44% of Page and Forer's sample. When this pattern is broken down to show the domestic component it can be seen how different international and domestic travel patterns in the region are. Map 5.2 shows the "areas where domestic tourists are more or less common than international ones" (Page and Forer, 1998a, p.328). This pattern "appears to suggest that international visitors are more likely to explore the central and eastern roads while New Zealanders head into a number of off-beat areas more associated with small bays and quality, unexplored beaches" (Page and Forer, 1998a, p.328).

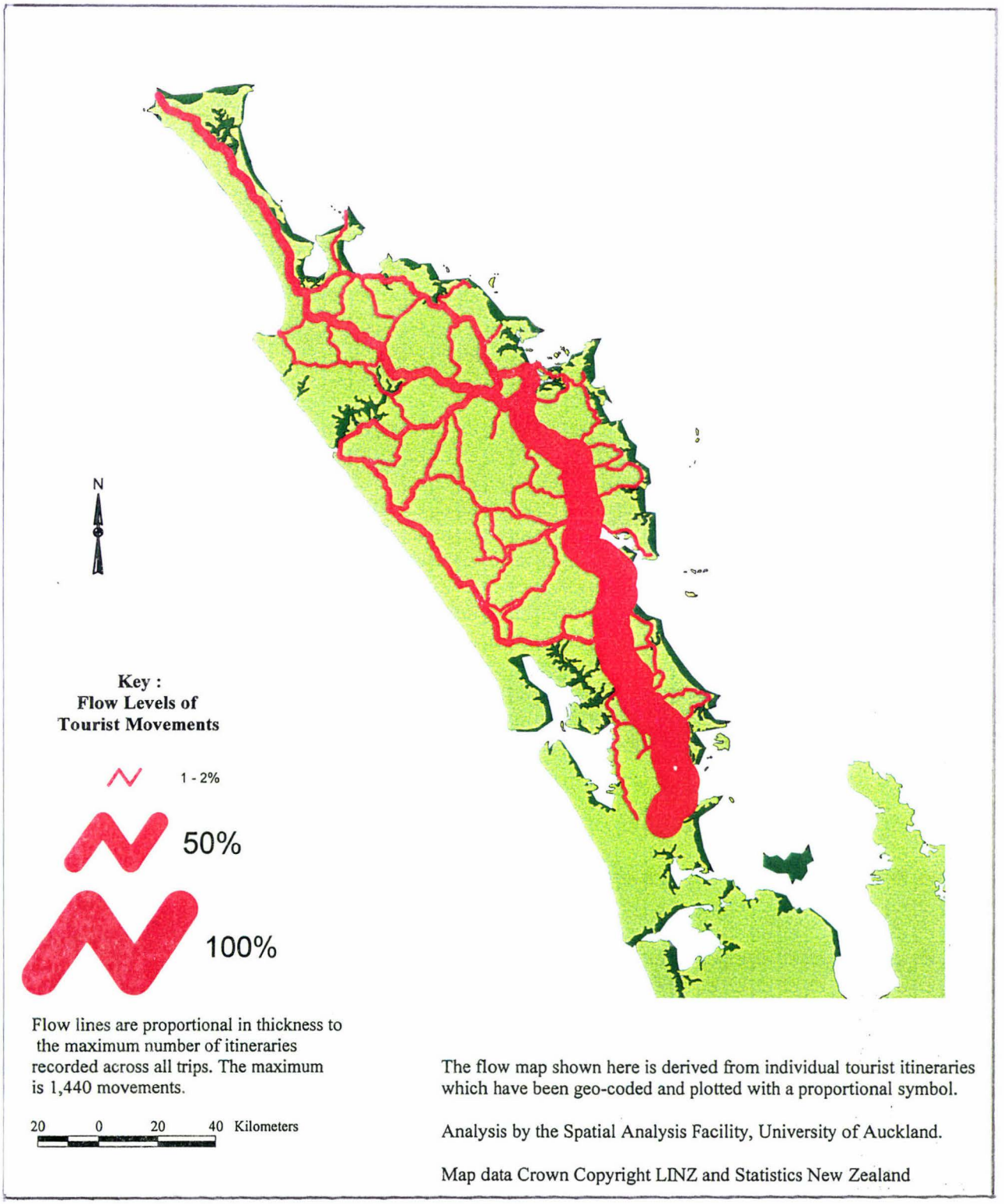
This supports the finding of this study that the pattern of visitation of Auckland residents tends to be widely spread over the region and not greatly dominated by the main centres of Whangarei and the Bay of Islands. This shows that domestic visitors may be more important than international for the generation on tourism-related income for the region as a whole. However, although domestic visitors travel to more off-beat areas they have a lower expenditure than international visitors. This means that although they seem to be benefiting the more remote areas, they may not be contributing very much to their economy.

5.7.1 Kruskal-Wallis tests

Kruskal-Wallis tests were carried out to identify any differences in the areas visited by sex, age, and income. It was found that sex and income do not significantly affect the areas visited by respondents. It was found that age, however, does have a significant affect. The significant p-values are shown in Table 5.10. From these results it was possible to determine that:

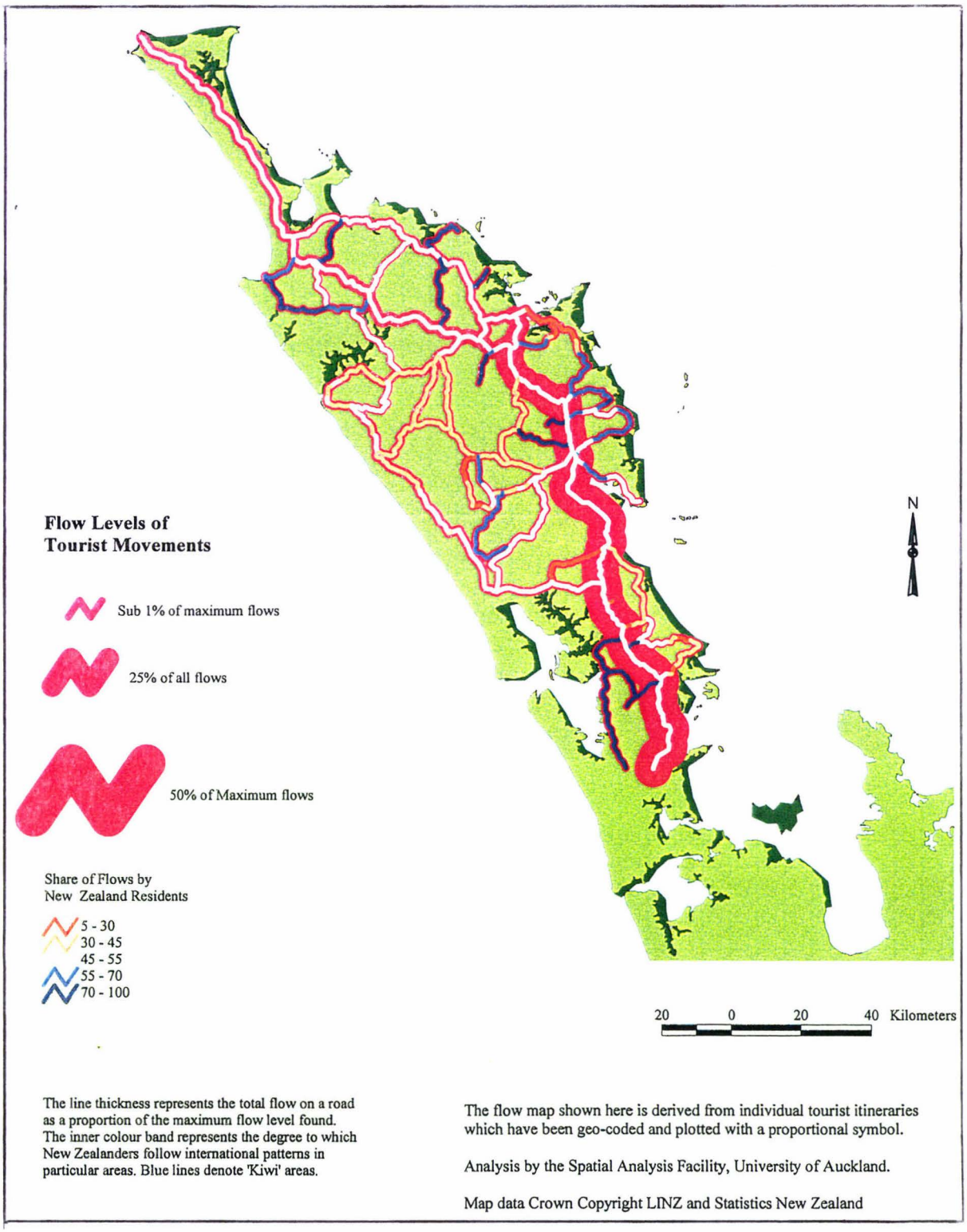
- People aged under 25 are significantly less likely to visit Kaikohe.
- People aged over 66 are significantly more likely to visit Kaikohe.
- People aged under 25 or between 36 and 45 are significantly less likely to visit

Map 5.1: Movement patterns of Northland Visitors derived from Tourist Visitor Survey 1997-8



Source: Page and Forer (1998a, p.326).

Map 5.2: Movement patterns of New Zealand Northland visitors derived from tourist visitor survey 1997-8 and showing differential flow patterns



Source: Page and Forer (1998a, p.330).

Doubtless Bay.

These first two points may be due to two reasons. Firstly, the younger age groups are more likely to be taking part in water-based activities and so may not venture inland to Kaikohe. Secondly, the Ngawha hot springs near Kaikohe may be attracting the older age groups. These springs have long been believed to ease arthritis and therefore attract this older age group to the area.

5.7.2 Factor analysis

A factor analysis was carried out on the areas visited while in Northland. Four Factors were identified, accounting for 64% of the sample. Their characteristics are shown in Table 5.11. From these results it is possible to describe these new variables.

Factor 1 measures the importance of the north-west area. It is interesting that this region should be singled out. This region is the antithesis of the tourist centres in the west of the region and it is not surprising that it is attractive to many Auckland residents. As discussed in section 5.7, many Auckland residents avoid the main tourist centres and actively seek out more remote areas as represented by those in Factor 1. Factor 2 measures the unimportance of the Bay of Islands in the travel of Auckland residents. Like Factor 1, this Factor also represents those Auckland residents that avoid the main tourist centres. Unlike Factor 1 though, this Factor represents areas that are unimportant in themselves as long as they are not Kerikeri, Paihia or Russell. Factor 3 measures the importance of areas of secondary popularity that are not on the main tourist routes. While not being as off-beat as the areas represented by Factor 1, they are remote enough to have little international visitation. Factor 4 measures the importance of areas that are not known tourist destinations. The heading of 'other', shows that these areas were too remote to have even been listed on the questionnaire. This Factor represents areas of Northland even more remote than those in Factor 1.

5.8 Visitor Information Network

Respondents were asked about their awareness and usage of New Zealand's Visitor Information Network. The results are shown in Figure 5.11. These are interesting results as it might have been expected that the proportions of people who were aware of the Visitor Information Network and had made use of a Visitor Information Centre (VIC) would both have been higher. There are six VICs in the Northland region: Dargaville, Whangarei, Omapere, Kaikohe, Paihia, and Kaitaia (see Map 5.3).

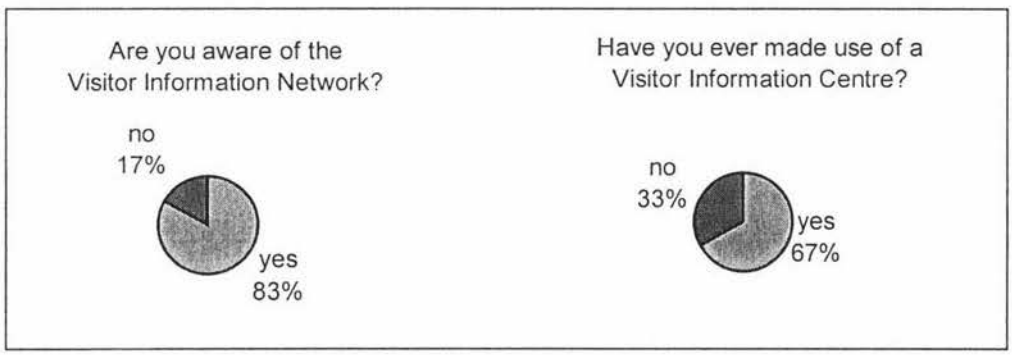
Table 5.10: Kruskal-Wallis test significant p-values for areas of Northland visited, by age

Area	p-value
Kaikohe	0.028
Doubtless Bay	0.043

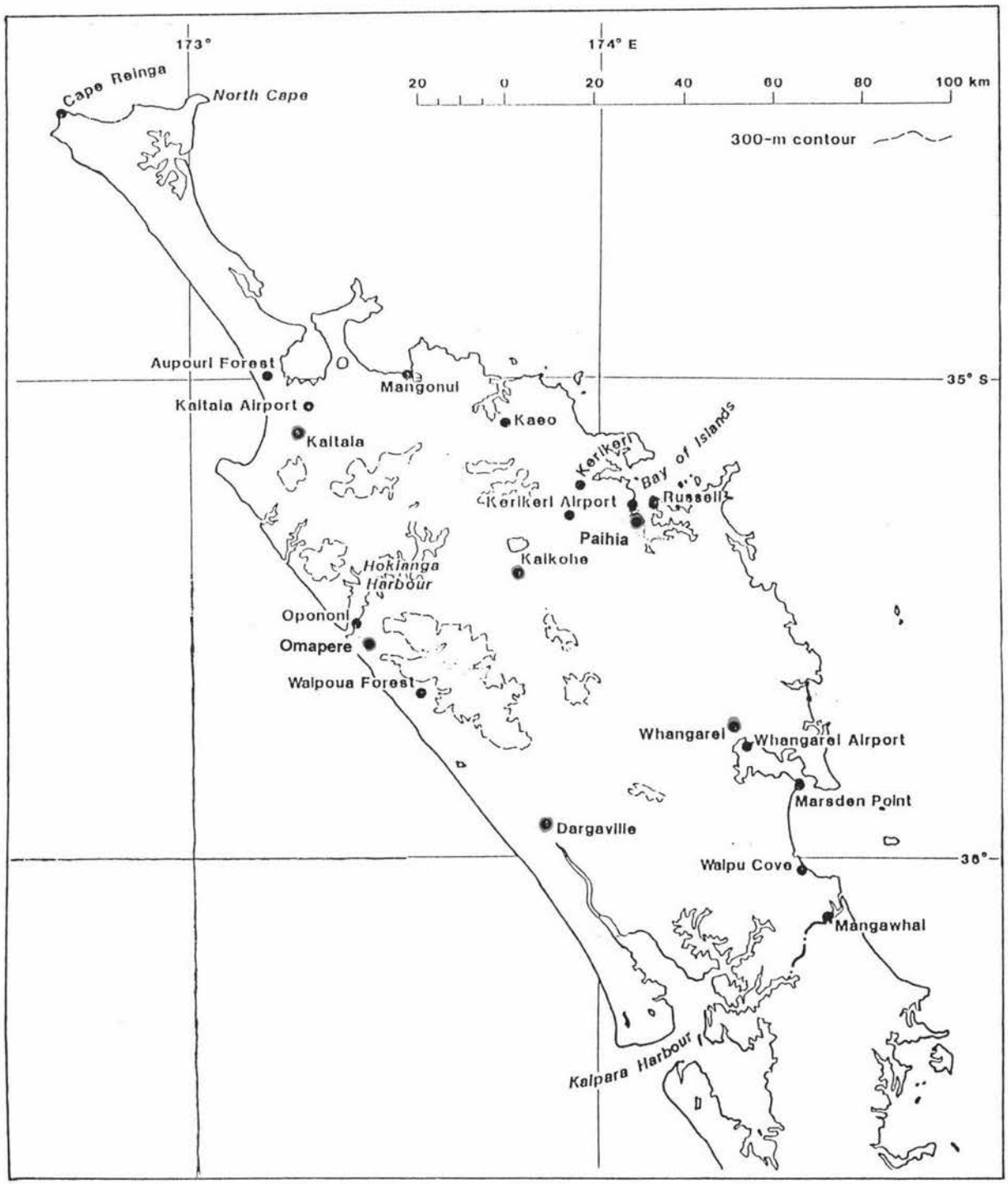
Table 5.11: Factors present in the areas visited while in Northland

	Opinion		% of sample
Factor 1	important areas	Kaitaia Dargaville Kaikohe Cape Reinga Hokianga Harbour	24.7
Factor 2	unimportant areas	Kerikeri Paihia Russell	16.6
Factor 3	important areas	Tutukaka Waipu Doubtless Bay	14.9
Factor 4	unimportant areas	'other'	7.9

Figure 5.11: Awareness and usage of the Visitor Information Centre Network



Map 5.3: Northland's Visitor Information Centres



A comparison can be made between the location of Northland's VICs, the areas of Northland visited by respondents (see Figure 5.10) and the visitation patterns in Northland (see Map 5.1). It would appear that an area having a VIC makes little difference to its visitation levels. Indeed the placement of Northland's VICs seems curious with the New Zealand Tourism Board recognising that "some offices are in questionable locations" (New Zealand Tourism Board, 1996, p.47). Northland's VICs seem to have other problems apart from their 'questionable locations'. The New Zealand Tourism Board has stated that "in general, visitor information services in Northland are below the standard now evident in other New Zealand regions" (NZTB, 1996, p.47). The effect this has on tourism in the region is difficult to gauge but this lack of information may be contributing to Northland's image as solely an outdoors-based, sunshine location. Were the information services in the region operating as well as those in the rest of the country, visitors may be more aware of the region's other attractions and the possibilities for low-season travel.

5.8.1 Kruskal-Wallis tests

Kruskal-Wallis tests were conducted to determine whether there were any significant differences between the sexes, age groups and income groups for these questions. None of the resulting p-values for the awareness of the Visitor Information Network were less than 0.05. This makes it possible to determine that sex, age and income are not significant factors in the awareness of the Visitor Information Network. There was one significant p-value for the tests on usage of the Visitor Information Network. This p-value was 0.047 and showed that age was a significant factor. It could be determined that respondents aged between 26 and 45 were significantly less likely to have used the services of a VIC, and that respondents over the age of 66 were significantly more likely to have used the services of a VIC. The New Zealand Tourism Board identifies one role of VICs as being to "aid in distributing visitors throughout the region" (New Zealand Tourism Board, 1996, p.47). If this aspect of their existence was focused on in Northland, international visitors may begin to adopt a visitation pattern more like that of New Zealand residents. In this way the more remote areas if the region would also benefit from the high-expenditure international visitors.

5.9 Twin Coast Discovery Highway awareness

Respondents were asked if they were aware of the route in Northland known as the Twin Coast Discovery Highway (see Figure 5.12). It was found that 29% of respondents were familiar with the name. Considering that Destination Northland only began carrying out serious promotion of the Twin Coast Discovery Highway several months after this survey

was conducted, this is quite a high level of awareness. At the time the survey was conducted the Twin Coast Discovery Highway was better known within the tourism trade than amongst consumers. Now that serious promotion of the Highway has begun (such as Julia Thorne's (1999) excellent *AA Directions* article) awareness amongst consumers should rise. Whether this translates into consumers actually following the Highway rather than just its well-worn eastern section between Auckland and the Bay of Islands remains to be seen. What is clear is that transport infrastructure which is adequately signposted and encourages visitors to explore and discover the region is essential to address existing patterns of tourist distribution.

5.9.1 Kruskal-Wallis tests

Kruskal-Wallis tests were carried out to determine whether there were any significant differences in awareness between the sexes, between the age groups and between the income groups. None of the resulting p-values were less than 0.05 so it is possible to determine that sex, age and income are not significant factors in the awareness of the Twin Coast Discovery Highway. These results are interesting as they suggest that the sample has become aware of the Highway through ways that are not more likely to have reached any particular sex, age, or income group.

5.10 Competitiveness of Northland as a domestic destination

The penultimate question in this Northland section of the questionnaire asked how competitive Northland was compared to other domestic holiday destinations. A five point Likert scale was used and the mean response for each area is shown in Table 5.12. All four of the categories have means of less than 3 (the middle of the Likert scale) which means that Northland did not compare unfavourably with other domestic destinations. The fact that the highest of the means was only 2.5390, however, shows that respondents were not overly impressed with Northland's competitiveness. This result may seem somewhat surprising as Northland can be strongly associated with the lower-cost tourism products including accommodation (such as camping grounds and backpacker hostels) and attractions (such as the coast). What these results may mean, however, is that although Northland *is* offering low cost tourism options, it may be being perceived that these products are also low value and therefore not particularly competitive with the rest of the country.

Figure 5.12: Awareness of Northland's Twin Coast Discovery Highway

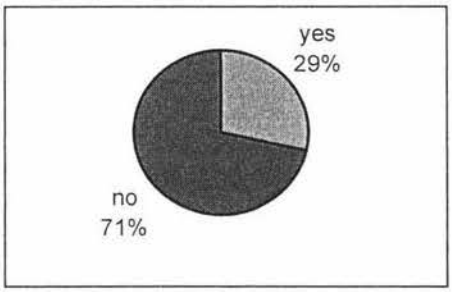


Table 5.12: Perceived competitiveness of Northland as a New Zealand destination (ranked by mean in descending order of competitiveness)

Area	Mean
Accommodation costs	2.5390
Attractions/activities costs	2.5420
Restaurant/café prices	2.8097
Transport costs	2.8189

Table 5.13: Opinion of statements concerning Northland (ranked in descending order of agreement).

Statement	Mean
I would recommend Northland to friends and family	1.7087
Northland has interesting historical attractions	1.8581
Northland has a wide range of outdoor activities	1.8878
Northland is a very popular New Zealand destination	2.1364
Northland is a great destination for families	2.1689
Northland is a great destination at any time of year	2.2175
Northland offers value for money as a destination	2.5497
Northland has a wide range of indoor activities	3.4708
Northland is only worth visiting in the summer	3.5049
Northland's towns and attractions are too crowded	3.5309

Table 5.14: Kruskal-Wallis test significant p-values for opinions of Northland, by sex

Statement	p -value
I would recommend Northland to friends and family	0.001
Northland has interesting historical attractions	0.010
Northland is a very popular New Zealand destination	0.007
Northland is a great destination for families	0.009

5.11 Tourist opinions of Northland

The last question in the survey of Auckland residents was a list of ten opinions of Northland with which respondents could agree or disagree by answering questions on a five point Likert scale. The statements covered a variety of topics and the mean response for each one is shown in Table 5.13. The fact that the statement 'I would recommend Northland to friends and family' had the highest mean response is very positive from Northland's point of view. This means that whatever the ranking of the other statements, the overarching factor is that respondents would recommend Northland as a destination. This is especially important as it has been established just how important positive word-of-mouth is to a destination as a form of promotion. It is also positive for the region that 'Northland has interesting historical attractions' is so strongly agreed with. The New Zealand Tourism Board believes that one initiative to increase low season visitation is "further development and increased promotion of historic, cultural and natural heritage tourism" (New Zealand Tourism Board, 1996, p.23).

Another interesting result, given Northland's marked tourism seasonality, is that the statement 'Northland is a great destination at any time of year' ranked sixth with the relatively high mean of 2.2175. Linked to this is that the statement 'Northland is only worth visiting in the summer' ranked down the list at ninth place. Not surprisingly given the region's population, the statement 'Northland's towns and attractions are too crowded' ranked last with the low mean of 3.5309. It is also notable how low on the list 'Northland offers value for money as a destination' ranks. This is consistent with the results in section 5.10 and has serious implications for seasonality in Northland. If Northland is indeed perceived as not offering particular value for money as a destination this could be a further deterrent to low income travellers. As well as deterring travel in the high season, this perception may also deter travel in the low season for these income groups. It has already been established that lower income groups are less likely to travel in the low season and this perception of Northland as not being a particularly good value destination makes this travel even more unlikely.

5.11.1 Kruskal-Wallis tests

Kruskal-Wallis tests were carried out to determine whether there were any significant differences in opinion between the sexes with regard to these statements. The resulting significant p-values are shown in Table 5.14. From these results it can be determined that:

- Women are significantly more likely than men to agree that Northland has interesting historical attractions.
- Women are significantly more likely than men to agree that Northland is a very popular New Zealand destination.
- Women are significantly more likely than men to agree that Northland is a great destination for families.
- Women are significantly more likely than men to recommend Northland to friends and family.

These results show how divided the sexes can be in their experiences of a destination and the formation of opinions of that destination. Women may have been expected to be more likely to agree that Northland is a great destination for families as they are more likely to be consciously evaluating a destination on this particular point. This is because accompanying children tend to be considered more by women than by men. The other results though, are not so easily explained. The result concerning historical attractions is interesting as Section 5 showed that there was not a significant difference between the sexes in the attractiveness of historical attractions. This result may have negative implications. It may be that women do not find enough other pursuits in Northland to interest them and go to historical attraction as an afterthought. It may be that only then do they discover how interesting Northland's historical attractions can be. That women are more likely to think that Northland is a very popular New Zealand destination may mean that they are more sensitive than men to the overcrowding that can occur in the region in the high season. Alternatively, it may just mean that women are more likely than men to have gained this impression through talking to other people more than men do. This may also be the reason for the last result. Women may simply be more likely than men to talk about where they have been.

Kruskal-Wallis tests were carried out to determine whether there were any significant differences in opinion between the age groups with regard to these statements. The resulting significant p-values are shown in Table 5.15. From these results it can be determined that

- People aged under 25 are significantly less likely to think Northland is a great destination at any time of year.
- People aged over 56 are significantly more likely to think Northland has interesting historical attractions.

Table 5.15: Kruskal-Wallis test significant p-values for opinions of Northland, by age

Statement	p -value
Northland has interesting historical attractions	0.000
Northland is a great destination at any time of year	0.011

Table 5.16: Factors present in the opinions of Northland

	Opinion		% of sample
Factor 1	agrees that	Northland has a wide range of outdoor activities Northland offers value for money as a destination Northland is a great destination for families I would recommend Northland to friends and family	25.9
Factor 2	agrees that disagrees that	Northland is only worth visiting in the summer Northland is a great destination at any time of year	15.4
Factor 3	agrees that	Northland's towns and attractions are too crowded Northland is a very popular New Zealand destination	12.3
Factor 4	disagrees that	Northland has a wide range of indoor activities	11.2

These results are not surprising given that people under 25 are more likely to be undertaking outdoors-based holidays that are obviously subject to the weather in winter. Outdoors activities may be such an important element of a holiday for this age group that they may be particularly difficult to attract during the region's low winter season. The second point is also predictable as the older age groups are normally more interested in historical attractions than the younger groups. Kruskal-Wallis tests were carried out to determine whether there were any significant differences in opinion between the income groups with regard to these statements. None of the factors showed p-values of less than 0.05 so it is possible to determine that income is not a significant factor in opinions of Northland.

5.11.2 Factor analysis

A factor analysis was carried out on the opinions of Northland. Four Factors were identified, accounting for 64.97% of the sample. Their characteristics are shown in Table 5.16. From these results it is possible to describe the new variables. Factor 1 measures the importance of a good value outdoors family experience. This is the largest grouping and represents a traditional view of Northland holidays. Factor 2 measures the importance of visiting Northland in the summer. It is perhaps not surprising that there is such a strong showing of this opinion. The proportion of the sample that have this view will be very difficult to attract in the low season. Factor 3 measures the importance of an uncrowded atmosphere. While the region itself is quite sparsely populated, it can become very busy in summer so this variable would seem to apply only to the high season. Factor 4 measures the importance of indoor activities. The sample was accurate in disagreeing that 'Northland has a wide range of indoor activities'.

5.12 Summary

This chapter has produced a profile of the travel behaviours of Auckland residents with regard to the Northland region. Of particular interest are the behaviours of the most and least seasonal age groups of the sample as identified in section 4.6. Age group 1 (people aged 18 – 25) was found to be the most seasonal group of Auckland travellers. This finding is again evident in this section as age group 1 is the least likely age group to agree with the statement that 'Northland is a great destination at any time of year'. In contrast, age group 6 is the most likely to agree with the same statement.

The main reason for age group 1 to travel to Northland is for a holiday, followed by visiting friends and relatives. The areas of Northland most visited by age group 1 are: Whangarei,

Paihia, Russell, and Kerikeri. While in Northland, members of age group 1 tend to stay in caravan or camping sites or with friends and relatives. Members of age group 1 usually spend between one and six nights in Northland (40.63% usually stay for 1 to 3 nights, 46.88% usually stay for 4 to 6 nights). The proportion that visits Northland every year is 47.06%. The proportion that visits Northland at the same time every year is 50%. Those that do not visit Northland at the same time every year probably still travel during the summer season if not over exactly the same dates.

Age group 6 is the most likely to think Northland is a great destination at any time of year. The main reason for age group 6 to travel to Northland is for a holiday, followed by visiting friends and relatives. When in Northland age group 6 visits Kerikeri, Paihia, Russell, and Whangarei. This group tends to stay in motels or with friends and relatives. This age group usually spends between 4 to 6 nights in Northland (38.2% of the sample) and has the longest average length of stay in Northland of 2.735 nights. The proportion of age group 6 that visits Northland every year is 56.76%. The proportion that visits Northland at the same time every year is 31.81%. Age group 6 is more likely than any other age group to have used a Visitor Information Centre.

6 Survey of Northland's Tourism-Related Businesses

6.1 Introduction

This section presents the results of a survey of a selection of Northland's tourism-based businesses. The survey took the form of a postal questionnaire and was mostly quantitative and descriptive in nature. Much tourism research examines the demand side of the industry and "supply issues still remain [a] poorly researched area" (Page and Forer, 1998b, p.365). This survey then, can provide valuable insights into the supply side of Northland's tourism industry. Page and Forer (1998b, p.366) note with reference to small tourism businesses, "without an accurate knowledge base in this area, both the development of tourism businesses and the contribution that research can make to policymaking, planning and the future prosperity of tourism will be impeded through inadequate information and analysis of the needs of the small business sector". This can be equally applied to tourism businesses in general.

This survey aimed to assess seasonality from the supply side of the tourism equation. It first determined the basic demographics of the sample in terms of business size, location, activity, age, and turnover. The survey aimed to determine the severity of any seasonal impacts experienced by the businesses. It also examined how the businesses are dealing with these problems and whether they were attempting to reduce the seasonality of their patterns of demand. Information was also produced about the businesses' methods of promotion, and membership of New Zealand's Visitor Information Network. The business survey is an important part of this study of seasonality. It offers a view of seasonality from the supply side of the tourism industry. The business survey was designed to address some of the same topics as the Auckland residents' survey but from a different perspective. This allows for comparisons which can identify any conflicts between the operators and the consumers. Any significantly different attitudes between the groups may help identify some of the region's key problem areas with regard to seasonality.

6.2 Methodology

6.2.1 Research objectives

This research was designed to discover information on tourism seasonality in tourism-related businesses in the Northland region. Specifically, it aimed to determine:

- the customer profile and demand patterns of the businesses.
- the problems seasonality creates for businesses and the severity of the problems.

- the methods businesses are using to combat these problems.
- the forms of promotion being used by the businesses.
- businesses' opinions of various ways of attracting low season visitors.
- businesses' membership and opinion of the Visitor Information Network.

6.2.2 Sample design

In March of 1999, fifty questionnaires (see Appendix 2) were sent to a selection of Northland's tourism-related businesses of a variety of sizes, locations, and activities. Twenty-three usable responses were returned. Page et al's (1999) study of small businesses in Northland provided a useful model for this survey of Northland's tourism-related businesses. Indeed this study closely followed the methodology and survey instrument published by Page et al (1999). The tourism-related businesses to be involved in this study were selected from lists of the region's suitable businesses provided by Destination Northland. The selection of the businesses was weighted by their location to reflect the actual concentrations of Northland's tourism-related businesses throughout the region. The selection of the businesses was not entirely random due to the need for a variety of business sizes and activities to be present in a reasonably small sample.

6.2.3 Research strategy and data collection

The research was designed to be of a descriptive, deductive nature that would generate predominantly quantitative data. The research was conducted through the use of a closed-question postal questionnaire. In May 1999 fifty questionnaires were posted out together with a covering letter and a reply paid envelope (see Appendix 2). Of these fifty questionnaires, 23 were usably returned. This gives a response rate of 46% which compares very favourably with other postal surveys (Page et al, 1999, p.444).

6.2.4 Data analysis

The data gathered was mostly quantitative in nature and the Minitab 12 for Windows statistical programme was used to analyse the data. Little detailed analysis was required as this section is generally descriptive in nature. This section is more interested in presenting the responses given by the businesses than deeply analysing them. Graphs were generated using Microsoft Excel.

6.2.5 Limitations

As with any postal survey, the data gathered will not be absolutely representative of the population. In some cases responses obtained are generally from people who feel strongly about the subject matter in some way which means that the data gathered can give a false impression by tending towards extremes of opinion. This factor may be present in this study as members of the sample who are either severely affected by seasonality or for whom it causes only minor difficulties may have been more likely to respond than those for whom seasonality is a moderate disruption in their operations but which they accept as being a characteristic of the tourism industry.

6.3 Profile of respondents

The respondents varied widely in terms of location, activity, ownership, age and turnover. This section gives a basic description of the businesses that comprise this sample.

6.3.1 Location

The respondents were located within the Northland region as shown in Figure 6.1. Although widely distributed, a large proportion of respondents were from the main tourism centres of Whangarei and the Bay of Islands. The distribution of the sample corresponds quite well to the actual distribution of Northland's tourism-based businesses. Two exceptions were the over-representation of Kaitaia and the under-representation of Whangarei.

6.3.2 Primary tourism-related activity

The respondents vary widely in their main tourism-related activity (see in Figure 6.2). Accommodation is the largest sector, accounting for 31% of respondents. Museums, at 13%, also account for a reasonably large proportion of respondents. Restaurants and cafes, possibly the least directly tourism-related businesses (and therefore the least susceptible to tourism-related seasonality) account for just 9% of respondents.

6.3.3 Ownership

Respondents were then asked what form the ownership of their business took. The results are shown in Figure 6.3. The high proportion of individually owned businesses reflects the fragmented nature of New Zealand's tourism businesses. The New Zealand Tourism Board had recognised the fragmented nature of the region's tourism industry

Figure 6.1: Businesses surveyed by location

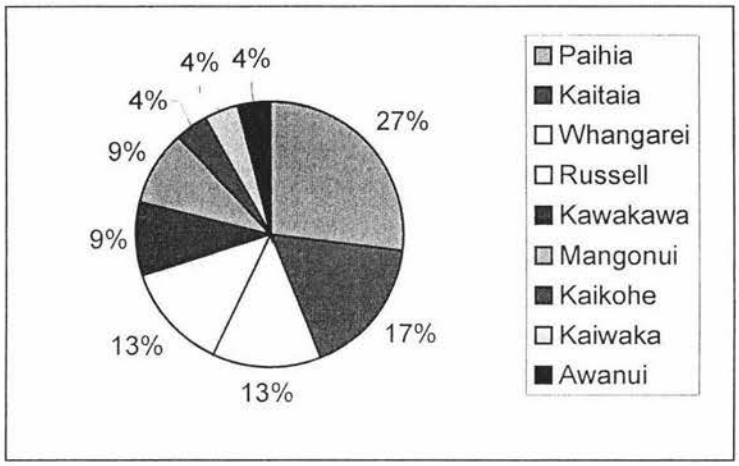


Figure 6.2: Businesses surveyed by primary tourism-related activity

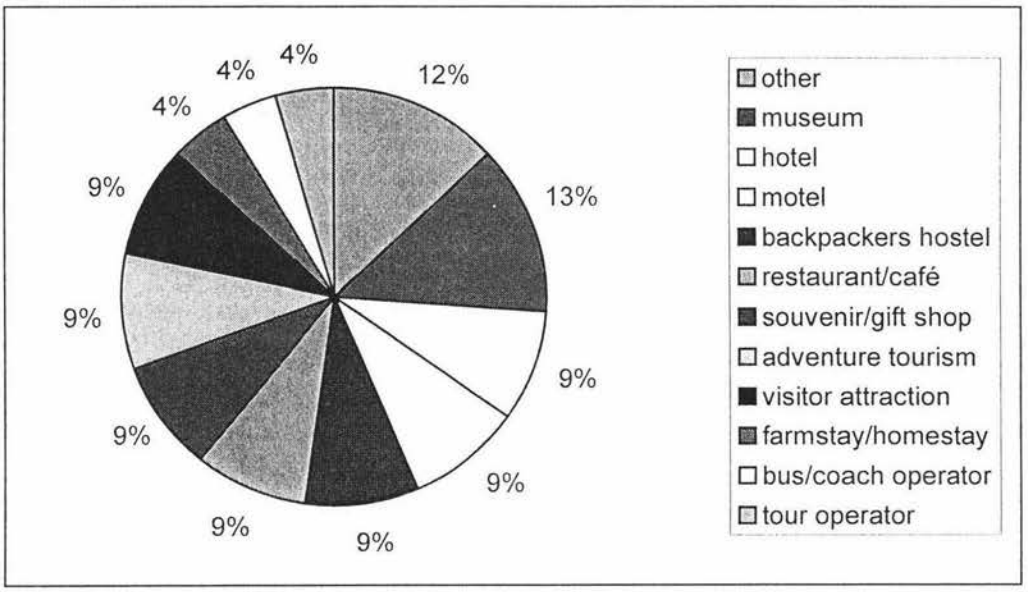
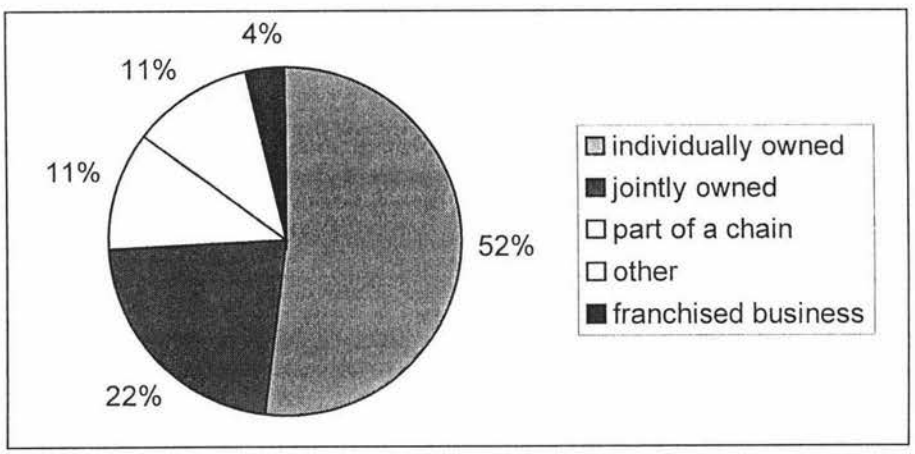


Figure 6.3: Businesses surveyed by ownership



and also notes that within the industry "professionalism is lacking, possibly reflecting the priority placed on lifestyle by many industry operators" (New Zealand Tourism Board, 1996, p.1). This profusion of small, individually owned businesses lends a certain instability to the country's tourism industry. The survival of these businesses from year to year in such a competitive market is not guaranteed. This situation is by no means unusual though as it is recognised that within tourism the "vast majority of entrepreneurs are small scale" (Page and Forer, 1998, p.365).

The next question concerned the respondents' motivations for owning/operating their business. This produced some interesting results as seen in Figure 6.4. The high proportion of respondents who chose 'to do what I enjoy while making a living' is a notable characteristic of the sample. It shows that the monetary rewards of operating a business are not the main concern for the majority of respondents. This suggests that the financial problems associated with seasonality may not be as serious a concern for these respondents. The financial problems would seem to be of particular concern to the 5% of respondents for whom the main motivation selected was 'to make more money than by being employed by someone else'.

6.3.4 Age of business

Respondents were also asked how long their business had been in operation (see Figure 6.5). Clearly the businesses surveyed tend to be relatively young with 46% in operation for less than 11 years. The median age of the businesses surveyed was 13 years and the oldest had been in operation for 67 years. The large proportion of businesses that have been in operation for less than six years tends to reflect the fragmented nature of the tourism industry in New Zealand.

6.3.5 Turnover

Towards the end of the survey respondents were asked to estimate their approximate annual turnover (see Figure 6.6). The lowest annual turnover was given as $5,000 while the highest was $10 million. The median turnover was $97,500. In this case the median is a more appropriate measure of average than the mean as it is able to remove the distortion that extreme responses can have on the mean figure.

6.3.6 Customer Origin

Finally in this section, respondents were asked if they could estimate the origin of their customers by the groupings of international, local, or other domestic. Seventy-eight

Figure 6.4: Respondents surveyed by main motivation for owning/operating the business

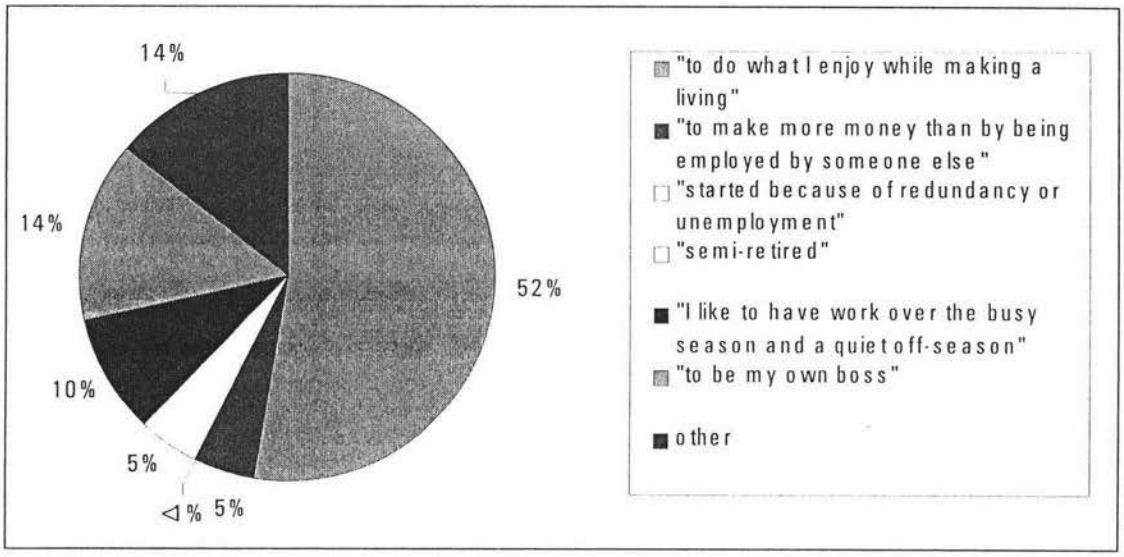


Figure 6.5: Years of operation of businesses surveyed

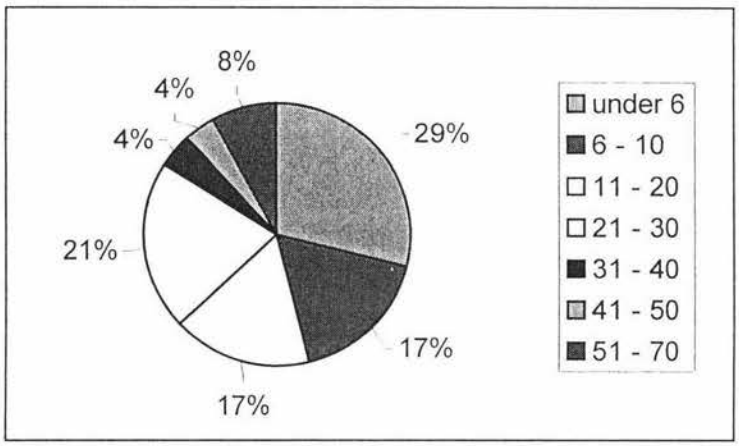
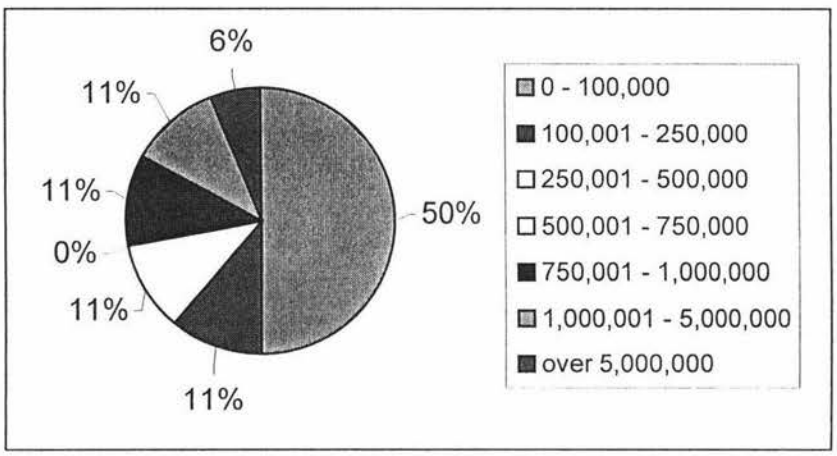


Figure 6.6: Businesses surveyed by approximate annual turnover



percent of respondents were able to do so. The mean responses for customer origin by each type of business appear in Table 6.1. Table 6.1 shows how varied the responses to this question were. The businesses with the highest proportion of local customers are bus/coach operators. This suggests that bus/coach operators may be less affected by tourism seasonality as they do not have to rely so strongly on the non-local market. The business types with the lowest proportion of local customers are farmstay/homestays and visitor attractions. The businesses with the highest proportion of other domestic visitors are hotels. This shows that hotels should have a particular interest in reducing the seasonality of the domestic market. The business type with the lowest proportion of other domestic customers is backpackers' hostels. The business type with the lowest proportion of international customers are farmstays and homestays. The businesses with the lowest proportion of international customers are hotels. In terms of seasonality in the domestic tourism market then, the most susceptible businesses (i.e. those whose customer base is largely domestic) are hotels, motels, souvenir/gift shops and museums.

6.4 Seasonality and respondents

This section looks at the demand patterns and associated problems experienced by Northland's tourism-based businesses. It identifies those businesses worst affected by seasonality.

6.4.1 Timing of respondents' seasonality

Not surprisingly, all of the respondents stated that their business experienced seasonal patterns of demand. The respondents then identified their busiest and quietest months as shown in Figures 6.7 and 6.8. The resulting patterns show just how pronounced the seasonal tourism demand pattern in the region is. It is interesting to compare Figure 6.7 with Figure 5.3. While Northland's tourism demand pattern is strongly defined around the summer, domestic tourism to other regions continues throughout the year.

6.4.2 Severity

Respondents were asked to rate their attitude towards seasonal demand patterns on a scale from 1 (a major problem) to 5 (a desirable situation). The resulting means for each area appear in Table 6.2, and for each business type in Table 6.3. It is interesting that Whangarei respondents gave as low a result as 2.667 compared to more remote areas given the belief that seasonality's effects are not felt as keenly in more urban areas (Pearce, 1989). It is clear from these results that one of the most severely affected sectors is accommodation.

Table 6.1: Origin of customers by business type

	% of customers		
	local	other domestic	international
Hotel	12	75	3
Motel	10	60	30
Backpackers hostel	20	0	80
Farmstay/homestay	0	16	84
Restaurant/café	30	32.5	37.5
Souvenir/gift shop	12.5	47.5	40
Adventure tourism	40	27.5	32.5
Visitor attraction	0	30	70
Museum	7.5	42.5	50
Bus/coach operator	55	5	40
Tour operator	5	25	70
Other	5	45	66.3

Figure 6.7: Busiest months for Northland businesses

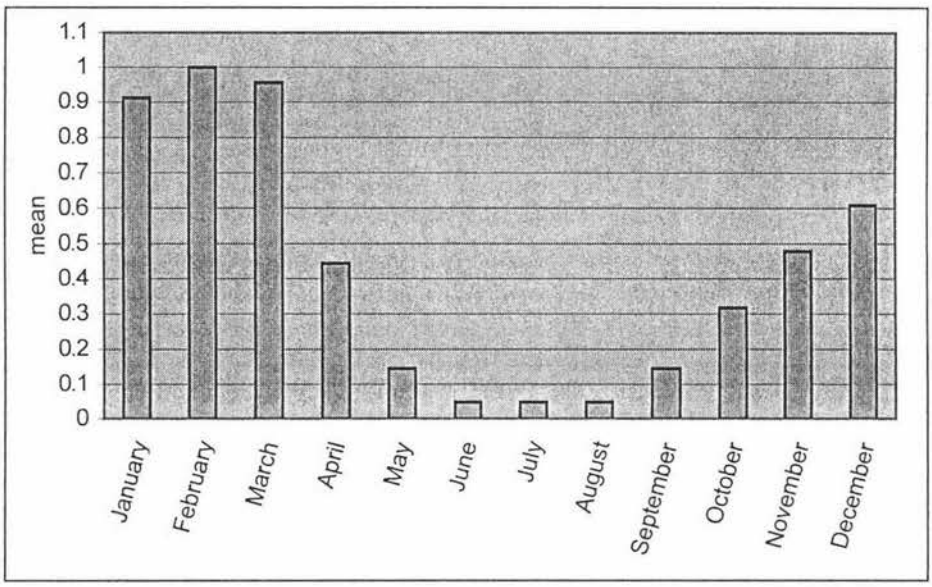


Figure 6.8: Quietest months for Northland businesses

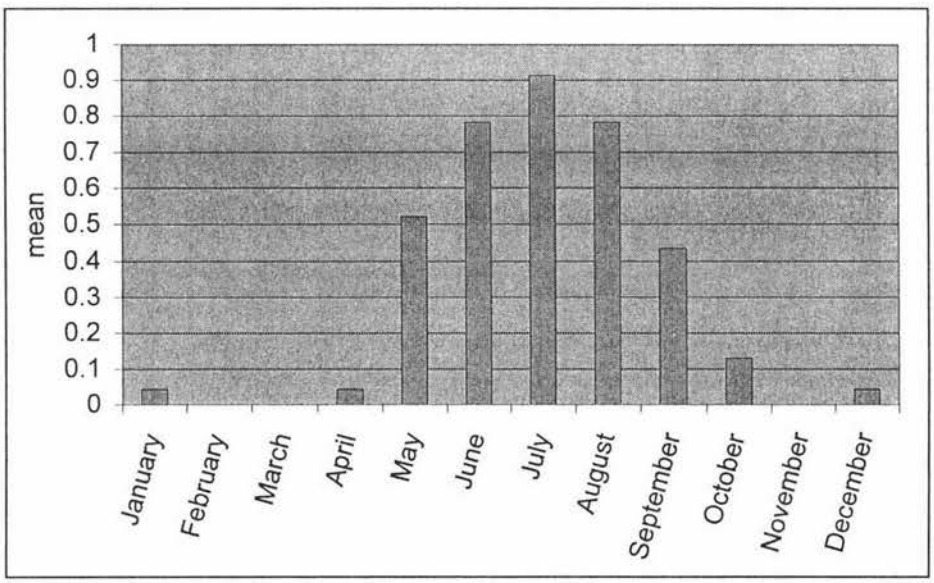


Figure 5.3: Months during which respondents travel to Northland

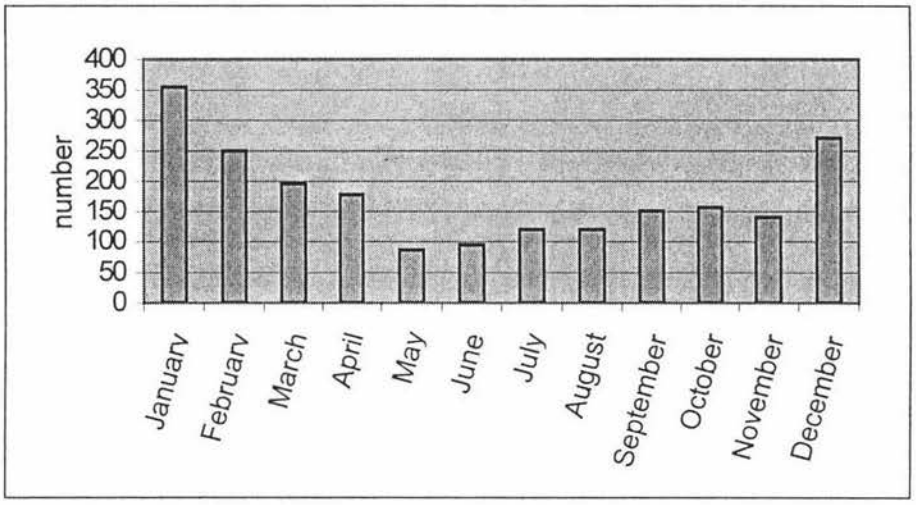


Table 6.2: Severity of seasonality problems by location of business (in order of severity)

Location	mean
Kaiwaka	2.000
Kawakawa	2.000
Awanui	2.000
Kaitaia	2.250
Russell	2.333
Whangarei	2.667
Manganui	3.000
Paihia	3.600
Kaikohe	4.000

Table 6.3: Severity of seasonality problems by main activity of business (in order of severity)

Activity	mean
Farmstay/homestay	5.000
Adventure tourism	4.500
Other	3.333
Hotel	3.000
Tour operator	3.000
Motel	2.500
Backpackers hostel	2.500
Bus/coach operator	2.000
Restaurant/cafe	2.000
Souvenir/gift shop	2.000
Visitor attraction	2.000
Museum	2.000

6.4.3 Problems

All of the respondents stated that they have seasonal fluctuations in their income. Only 70%, however, said that this fluctuating income caused any problems for their business. The actual problems experienced by this 70% are shown in Figure 6.9. These results are significant as they tend to confirm that cost-spreading is the most common seasonality-related problem experienced by tourism-related businesses (Cooper et al 1993, Collier 1994).

6.4.4 Capacity

Respondents were asked how the capacity of their facilities related to the seasonal variations in demand they experienced. They were asked whether they had large capacity facilities that were useful in the high season but then stood empty in the low season, or smaller capacity facilities that were overcrowded during the high season but not such a burden over the low season (see Figure 6.10). This result includes the 53% of respondents who stated that they experienced both problems. These respondents seemingly have a capacity that equates to their shoulder season and therefore experienced both a deficiency in the high season and an excess in the low season. This finding that excess capacity during the low season is the main capacity problem for respondents supports the literature's view that under-utilised resources is one of the greatest costs of seasonality faced by operators (McEniff 1992; Cooper et al 1993; BarOn 1999).

6.4.5 Seasonal employment

Respondents were asked how many employees they employed during various seasons: normal trading, busy season, and quiet season. The mean responses shown in Table 6.4 identify a definite variation in employment according to season. These results show that the main seasonal variation in employment is related to the laying off of staff over the low season rather than the hiring of additional staff over the high season. The mean responses according to each type of business are shown in Table 6.5. The most significant variations seen in this table are for restaurant/cafes and tour operators. Tour operators in particular are represented here as they do not benefit from the business travel of the low season in the way accommodation operators may. Solely tourism-based operations that cater to non-locals such as tour operators seem to be the most effected by seasonality. Tourism-based operations such as museums that can still have an attraction for local residents to not seem to be so badly affected. These results show how important a role seasonality plays in employment in the tourism industry. It also

Figure 6.9: Problems associated with seasonality as experienced by respondents

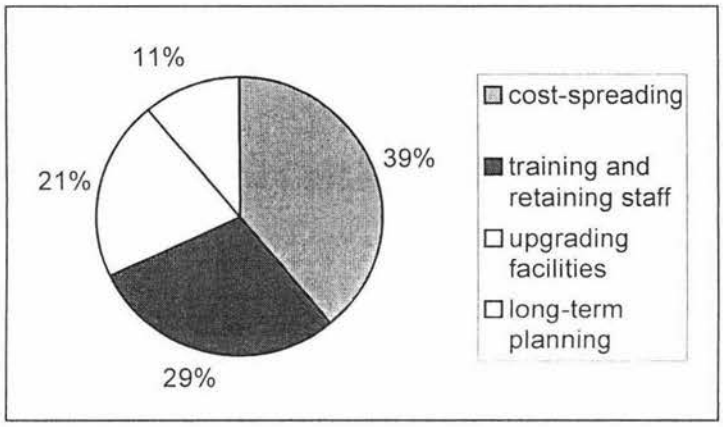


Figure 6.10: Main problem respondents experience in relation to their facility capacity

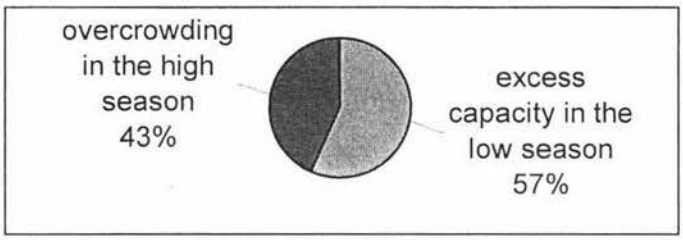


Table 6.4: Mean number of employees of businesses by season

season	number of employees
busy	14.5
normal	12
quiet	6.8

Table 6.5: Mean number of employees of businesses by season and business type

	Season		
Business type	busy	normal	quiet
hotel		40	
motel	0.5	0	0
backpackers hostel	1	0.5	0.5
farmstay/homestay	0	0	0
restaurant/café	10.5	5	4
souvenir/gift shop	11	10	9
adventure tourism	1	0.5	0.5
visitor attraction	13.5	10.5	9.5
museum	7	5.33	5
bus/coach operator	55	50	
tour operator	110	90	60
other	1	1.5	1

shows the scope of the problems that may be created for Northland society by losing employment over the low season.

6.5 Respondent's views on reducing seasonality

In this section respondents were asked what from they would like the pattern of demand for their business to take and whether they were trying to develop a more even pattern of demand. If they were trying to develop a more even pattern of demand they were asked how they were going about it. The results for the preferred pattern of demand appears in Figure 6.11 and clearly show that the great majority of Northland's tourism-related businesses would rather not experience their current seasonal pattern of demand. The proportion of respondents who prefer a seasonal pattern of demand to a more even one may seem surprisingly high. This is partly due to the nature of the Northland region; these respondents may be semi-retired or have other commitments during their region's low season.

Respondents were then asked whether they were attempting to develop a more even pattern of demand. It was found that 75% of respondents were trying to develop a more even pattern of demand. This 75% were then asked which methods they were using to do this (see Figure 6.12). It is positive that so many businesses realise the value of discounting over the low season. The 'other' methods offered by respondents were running courses for local unemployed, offering special meals at reduced prices, building up the retail side of the business, and targeting individual market sectors. One respondent was planning new facilities to extend the business's appeal and considering offering on-site accommodation. These respondents in particular have recognised the need for action to better cope with the low season.

Respondents were asked whether they currently operated activities over the low season that are different to those offered in the high season in an attempt to attract a different market or utilise facilities in a different way. They were given the example of the central North Island ski fields that encourage nature walks in their low season which is the summer period. Only 14% of respondents were found to be offering different activities during their low season These three respondents were a restaurant that offered themed- and party-evenings for local residents; a large marine tour operator that sponsored festivals and formed packages with the accommodation sector for the conference market; and a museum that built up it's specialised retail and repair service for local residents. Both the tour operator and the museum said that they would rather not have to do this and would prefer to be able to offer their primary activity year-round.

Figure 6.11: Respondent's preferred pattern of demand for their business

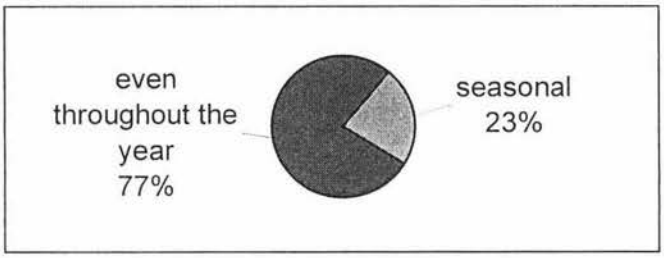


Figure 6.12: The methods respondents are using to attain an even demand pattern

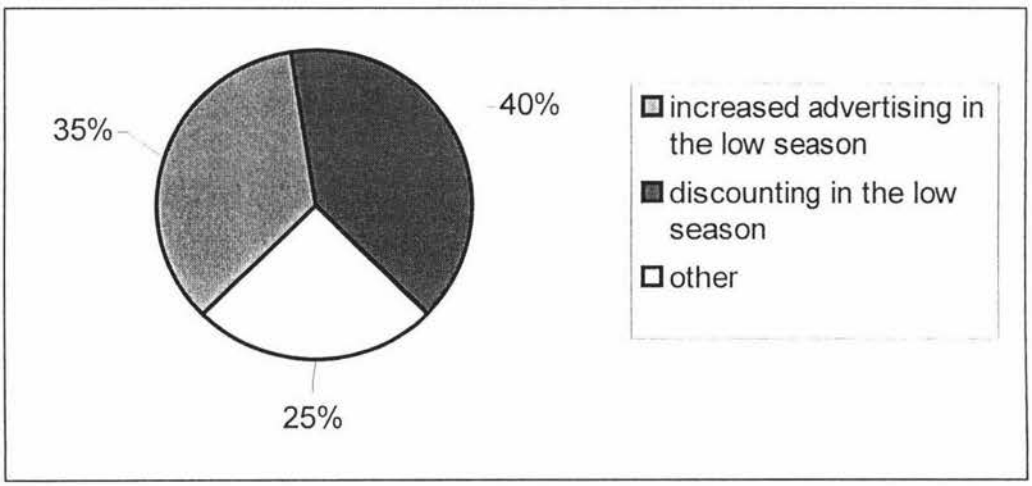
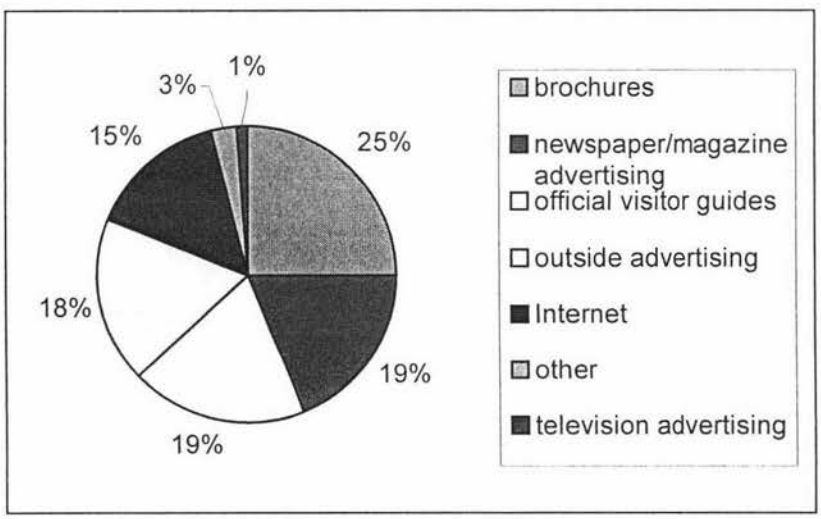


Figure 6.13: Forms of advertising used by respondents



6.6 Respondents' use of advertising

Respondents were asked what forms of advertising they used to promote their business (see Figure 6.13). It is interesting to compare these results with the opinions of Auckland residents of various forms of promotion as seen in Table 4.29. It can be seen that the businesses are correct in thinking that brochures are one of the more effective methods of advertising open to them. They would be advised though, to attempt to be featured in a travel article in a newspaper or magazine or in a television travel show. Auckland residents did not see television advertising as being particularly important but Northland's tourism-based businesses are generally too small to be able to afford television advertising anyway. Only one of the business respondents undertook television advertising. A relatively large proportion of business respondents said that they used the Internet as a way of advertising their business. They should not be deterred by the low importance given to the Internet by Auckland residents as such advertising will probably be used much more by their international customers.

6.7 Respondents' opinions of ways of attracting visitors during the low season

Respondents were asked to rate the effectiveness of certain factors in attracting visitors to Northland during the low season (see Table 6.6). These are the same factors Auckland residents were asked to rate as to their effectiveness in attracting them to a destination during its low season. It is interesting to compare Table 6.6 to the response of the Auckland residents as seen in Table 4.21. It is extraordinary just how different these responses are and the disparity may partly explain Northland's difficulties in combatting seasonality's problems.

6.8 Trends in seasonality in Northland

Respondents were asked whether they believed the seasonality in their business is more pronounced than it has been in the past (see Figure 6.14). The majority of respondents did not believe the seasonal demand for their business was worsening. This result is at odds with the belief that seasonality in the tourism industry is worsening (Soesilo and Mings 1987).

6.9 Respondents and the Visitor Information Network

In this section respondents were asked about their relationship with New Zealand's Visitor Information Network. Respondents were asked about their membership of Visitor Information Centres and it was found that 95% were members of at least one Centre.

Table 4.29: Factors affecting the choice of a domestic holiday destination (ranked by mean in order of influence)

Factor	Mean
Visiting friends and relatives	2.3664
Recommendation from a friend or relative	2.5492
Previous visit to the destination	2.5668
Featured in newspaper/magazine travel article or television show	2.9446
Brochure from the destination	3.0365
Television advertising of destination	3.3592
Other advertising of destination	3.5186
Recommendation from a travel agent	3.5513
Information gained from an Internet site	4.0824

Table 6.6: Respondents' views of the effectiveness of various factors in attracting visitors to Northland in the low season (ranked in order of effectiveness)

Factor	Mean
Staging a special event	2.000
Large-scale advertising campaigns	2.250
All-inclusive package tours	2.444
All-weather attractions	2.550
A special sports event	2.619
Discounted accommodation rates	2.619
Discounted transportation rates	3.211

Table 4.21: Effectiveness of various factors in prompting travel to a destination during its low season (ranked in order of effectiveness)

Factor	Mean
Discounted accommodation rates	1.8110
Discounted transportation rates	2.3981
Staging of a special event	2.5824
All-weather attractions	2.7838
All-inclusive package tours	3.1260
Staging of a special sports event	3.3556
Large-scale advertising campaigns	3.5320

Figure 6.14 The history of seasonality in Northland's tourism based businesses

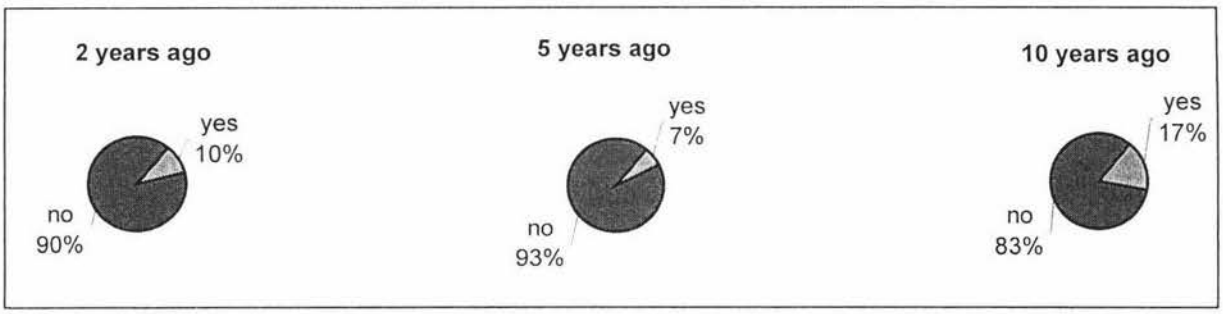


Figure 6.15: Membership of particular Visitor Information Centres

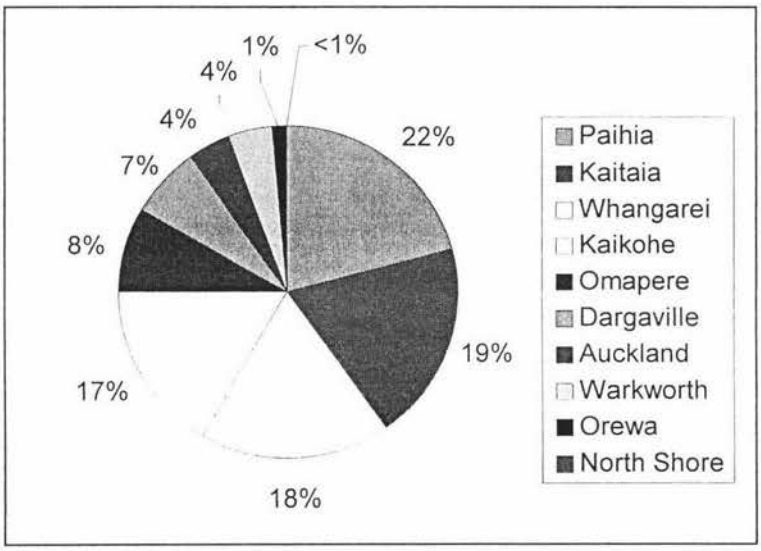


Table 6.7: Usefulness of Visitor Information Centres to respondents by business type (shown in order of perceived usefulness)

Business type	mean
visitor attraction	1
museum	1.667
adventure tourism	2
tour operator	2
hotel	2
backpackers hostel	2
other	2
motel	2.5
souvenir/gift shop	2.5
farmstay/homestay	3
restaurant/café	3.5

Respondents were then asked which Visitor Information Centres they belonged to (see Figure 6.15). These respondents were then asked how helpful the membership of Visitor Information Centres is to their business. They were asked to rate its usefulness on a scale of 1 to 5, 1 being 'very helpful' and 5 being 'not at all helpful'. The mean rating was 2.2 which only falls between 'quite helpful' and 'somewhat helpful'. The mean ratings by business type appear in Table 6.7. These results seem to suggest that Visitor Information Centres are most useful to those operations that tend not be organised until the visitor arrives at the destination. This is shown in the way visitor attractions, museums, adventure tourism and tour operators find Visitor Information Centres the most useful. Perhaps not surprisingly, restaurants and cafes found the Visitor Information Centres the least useful. This may be because these operations are the least likely to rely on the tourist trade and because visitors are perhaps unlikely to consult a Visitor Information Centre regarding them. Similarly, it seems unlikely that visitors would consult a Visitor Information Centre to discover a worthwhile souvenir or gift shop.

That hotels and backpacker hostels find Visitor Information Centres more useful than motels and farmstay/homestays suggests that these two forms of accommodation are more likely to be booked once the visitor arrives at the destination. This is possibly because hotels and backpacker hostels are perceived as being less likely to be fully booked than more ordinary accommodation such as motels or more specialised accommodation such as farmstays/homestays. These latter forms of accommodation appear more likely to have been booked before the visitor arrives at the destination, possibly before the visitor left home, due to their more unusual nature.

6.10 Other comments

The final section of the questionnaire provided space for respondents to add anything else they wanted to on the subject of seasonality in Northland's tourism industry. Some of the most pertinent comments are considered below:

- One respondent reported that a group of "people with an interest in tourism" has been formed to ensure that the Bay of Islands will host a special event every month. The group has a budget of $200,000 and is looking at events such as music festivals, food and wine festivals, and a tall-ships gathering.

- One respondent believed that tourism operators north of the Bay of Islands are not benefiting from Destination Northland promotions of the Northland region. They believe

that only business that contributed gained exposure and saw this as being at odds with the purpose behind Destination Northland.

- One respondent suggested that seasonality may be alleviated by more "all-weather activities" and "fewer bad forecast[s] on radio and television". This second suggestion is worrying for the implications it would have for visitor expectations, possible disappointment and resulting negative word-of-mouth.

- One respondent believed that the scattered nature of areas of interest over large areas of low population makes Northland a difficult region for visitors to tour without their own means of transport. The respondent believed that there is "no effective public transport [north] of Paihia" and that Kaitaia in particular is a difficult point to use as a base for visiting surrounding areas without private transport. They recognised that such a network may be unfeasible for a commercial operation but the problem remains. This view is at odds with that of the New Zealand Tourism Board which believes that "Northland is well suited for independent travel...and the required infrastructure and tourism product are of a generally adequate standard" (New Zealand Tourism Board, 1996, p.16).

- One respondent operated an attraction off the main tourist route and noted the difficulties of funding an attraction worthy of a detour in a visitor's itinerary while keeping a reasonable admission fee. They noted the dominance of package tours from Paihia in determining what visitors see, and the difficulties of not being on such circuits. They are considering closing down over the low season although they would rather not. They recognised the need for the region's low season marketing to differ from its high season "outdoor/scenic/beaches/summer" theme.

- One respondent viewed special events in Whangarei as a means of alleviating the area's seasonality. They stated that special events can be staged in Whangarei at a lower cost than in Auckland. They also believed that Whangarei can succeed in this through its mild climate (which means it can stage events "for nine months of the year") and the fact that "1/3 of NZ lives only 2 hours down the road".

- One respondent operated a souvenir/art and craft shop and has found that international visitors are prepared to pay more than New Zealanders for quality work. They plan to alleviate their seasonality problems by selling to this market via an Internet site.

6.11 Summary

All of the respondents were found to experience seasonal fluctuations in their incomes although none of the respondents stated that this was their desired demand pattern. In terms of the severity of the seasonality experienced, the majority of the business types stated that, at worst, seasonality was 'to be endured'. Some respondents though, did state that seasonality was either 'somewhat of a problem' or 'a major problem' for their operations. The main seasonality-related problem experienced by Northland's tourism-based businesses was found to be cost-spreading. The severity of seasonality-related problems experienced by businesses from Awanui and Kaitaia in the far north of the region, Kaiwaka in the south, and Kawakawa near the Bay of Islands, was higher than other areas. All of these towns except Kawakawa are well away from Northland's main tourist centres. Although Kawakawa is near the Bay of Islands it seems that either visitors are not stopping in the town on their way to the Bay of Islands, or that Kawakawa benefits from the Bay of Islands' summer visitors but does not have the Bay of Island's other non-tourist-reliant businesses to support the town over the low season.

Businesses with the main activity of adventure tourism, and farmstay/homestays had the most severe seasonality-related problems. This may be because these types of businesses are the least likely to be used by local residents so that their customer base during the low season is minimal. The least affected were those with the main activity of restaurant/café, bus/coach operator, souvenir/gift shop, visitor attraction, and museum. These businesses are more likely to be patronised by local residents which means that their low-season customer base is higher and so tourism seasonality's effects are less keenly felt. It seems that developing an aspect of a tourism business that can appeal to local residents during the low season is important to lessening tourism seasonality's effects. While the severity of a business's seasonality problems was not significantly affected by turnover, there was a general trend which suggested that businesses with annual turnovers over $100,000 were not as badly affected as those with turnovers under $100,000.

Clearly Northlands' tourism-related businesses are experiencing problems due to tourism seasonality. These problems may, however, generally not be as severe as traditionally thought. There are steps that the businesses themselves can take in lessening their seasonality-related problems such as developing their operations to attract local residents during the low season. On a larger scale though, the regional tourism authority may need to examine the markets it is targeting, the image of the region it is promoting and the methods it is using to do this.

7 Northland Visitor Satisfaction Survey

7.1 Introduction

This survey was designed to determine the nature of the customers of Northland's tourism-related businesses in terms of demographics and origin area. It examined their level of satisfaction with the tourism-related businesses in the region. The survey was part of a larger study of small businesses in Northland's tourism industry so the results are not necessarily representative of the entire industry. The survey was designed to examine the demand side of the tourism industry and provide feedback for the businesses involved. It is a useful part of this study in another way as it can help identify elements of the businesses which customers are not satisfied with. Creating a high standard of service in Northland's businesses may form a stable base from which to attempt to combat seasonality. If the region was to become known for its high standards of service this could serve as a differentiating factor with which to attract visitors during the low season.

7.2 Methodology

7.2.1 Research strategy and data collection

A sample of 25 of Northland's small business was selected and members were sent multiple copies of the questionnaire. The questionnaire was to be available for customers of the business to complete and return to the operator while on the premises. Of these 25 businesses, 15 took part in the survey and 534 completed questionnaires were received. The survey took the form of a relatively short (15 questions), predominantly closed-question questionnaire (see Appendix 3) which included four seven-point Likert scales to measure the attitudes of respondents to the businesses in question. The questionnaire examined the demographic profile of the respondents, their usage and evaluation of Northland's small business and their travel behaviours regarding Northland. This research took place over Northland's 1997/98 summer season.

7.2.2 Data analysis

This survey was mostly quantitative in nature so again the Minitab 12 statistical programme was used to analyse the data. As with the business survey, there was little actual analysis of the data in this section as there is more of a focus on simply presenting the responses given. Graphs were generated using Microsoft Excel.

7.2.3 Limitations

This research cannot give an absolutely accurate result because, as with a postal survey, some people may be more inclined to fill out the questionnaire than others. It may be that only people who felt strongly about the business took the time to complete a questionnaire. This can give falsely polarised results as customers that were indifferent to the businesses may not be represented. In the case of this survey in particular, only those international visitors that were able to read and write English will be represented in the sample.

7.3 Demographics

7.3.1 Sex

As with the other survey samples, this sample contained a significantly greater proportion of women than of men. Women accounted for 62% of the sample and men accounted for 38%. This result means that for responses that are not separated according to sex there may be a bias towards the views of the female respondents.

7.3.2 Age

The sample has a relatively even spread of age groups as seen in Figure 7.1. Given the method of distributing the questionnaire it is not surprising that only 7% of respondents were under the age of 20. This may suggest that the younger age group is less likely to complete such a questionnaire rather than that this age group is less likely to visit Northland. This result again suggests that Northland is a destination that has a very broad appeal rather than only attracting certain market segments.

7.3.3 Origins

The sample had a very wide range of origin countries as seen in Figure 7.2. Not surprisingly, the traditional markets of Australia, the United States and the United Kingdom are well represented. Beyond these the sample fragments into many small groups. The European countries collectively account for a major proportion of the sample. Asian countries account for a very small proportion of the sample. This may be due to a number of factors. At the time the research was carried out Asia was experiencing a financial crisis so visitation from this area was decreased. Also Asian visitors may be less likely to be able to read English than their European counterparts and so be able to complete the questionnaire. Lastly, Northland is not a traditional

Figure 7.1: Age of respondents

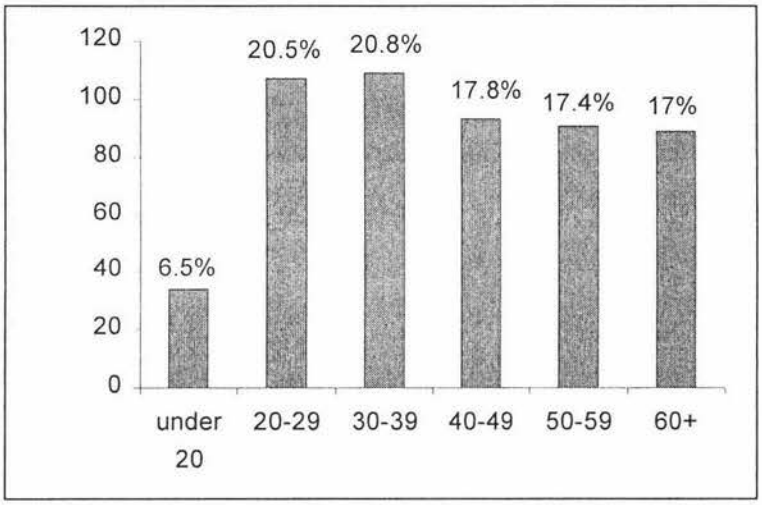
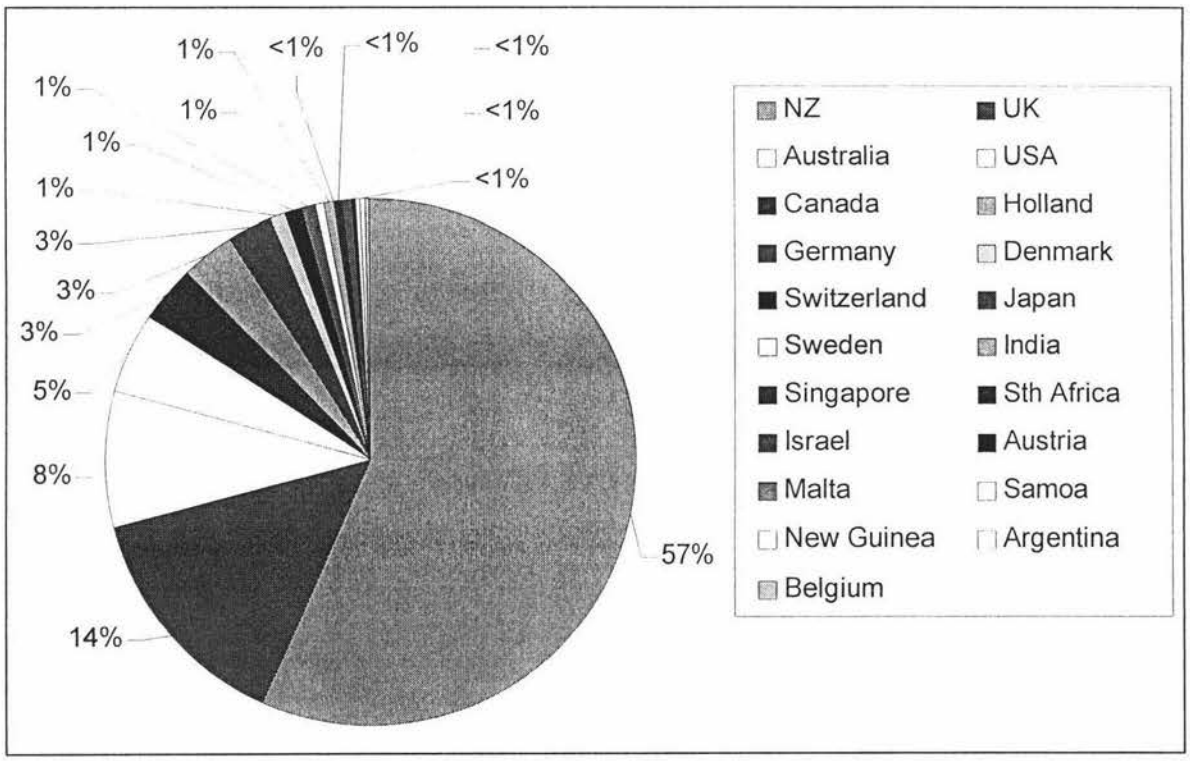


Figure 7.2: Origin of respondents



destination for New Zealand's Asian visitors given their propensity for package tours that are "focused on Auckland, Waitomo, Rotorua and Taupo" (Page, Forer and Lawton, 1998, p.16).

The New Zealand section of Figure 7.3 has been divided into its component parts in Figure 7.4. As expected, Auckland is clearly the leading origin of domestic visitors to Northland. Various areas of the North Island follow with the South Island accounting for only a little over 2% of all visitors to Northland. Auckland, at 26% of all visitors, accounts for the largest single origin area of visitors to Northland – domestic or international. The next largest grouping is visitors from the United Kingdom on 14%, just over half of Auckland's grouping. Auckland is certainly the most important market for Northland and may be the key to relieving Northland's seasonality. In the broader tourism picture though, there are a number of reasons why Northland should still be focussing its energies on international visitors. International visitors are likely to spend a greater amount of money than domestic visitors while in Northland. This is particularly true of areas such as transport and accommodation as they probably won't have their own vehicle and are less likely to be visiting friends and relatives.

7.4 Location and type of participating businesses

The businesses where the questionnaires were left were situated throughout the Northland region as shown in Figure 7.4. Most areas of Northland are represented and although they tend to be coastal in nature this reflects the distribution of Northland's tourism-based businesses. The towns where questionnaires were left also varied in size from Whangarei to Mill Bay (just north of Mangonui). The participating businesses also varied widely in their main activity as shown in Figure 7.5. A good selection of tourism-based businesses was covered by the questionnaire including accommodation, tour operators, and attractions.

7.5 Awareness and usage of participating businesses

Respondents were asked whether they had been aware of the participating business before they used it that day. It was found that 59% of respondents had had no prior knowledge of the businesses before they decided to use its services. This result suggests that in most cases, a respondents' decision to use a particular business was made practically in unison with the realisation of the need for its services. That is, usage of the business was largely not preplanned. This lack of planning has implications for the promotion used by the businesses in terms of necessity and

Figure 7.3: Origin of New Zealand respondents

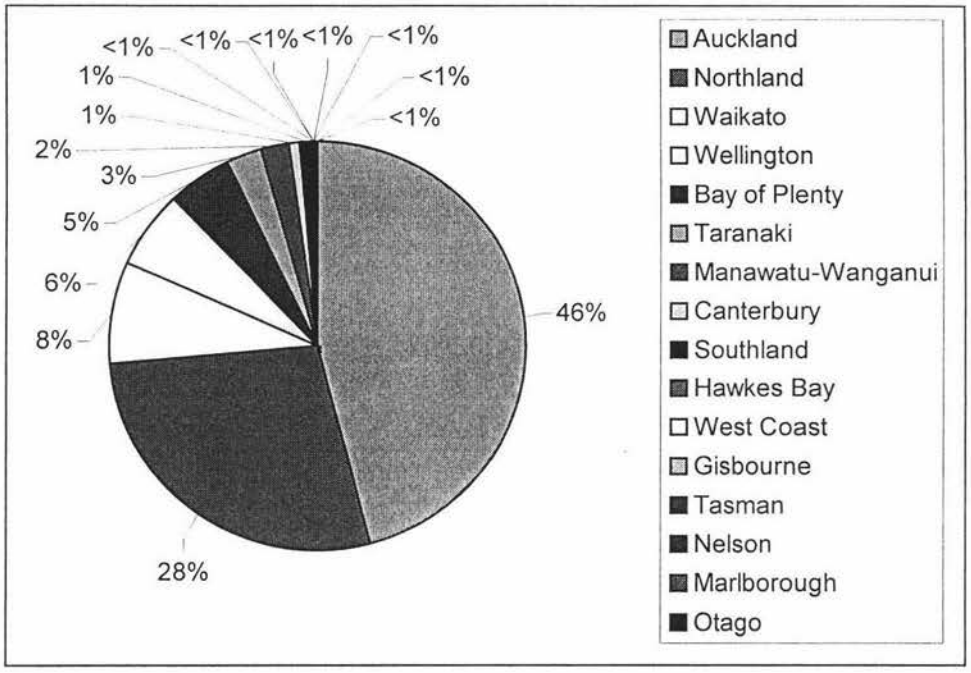


Figure 7.4: Locations of participating businesses

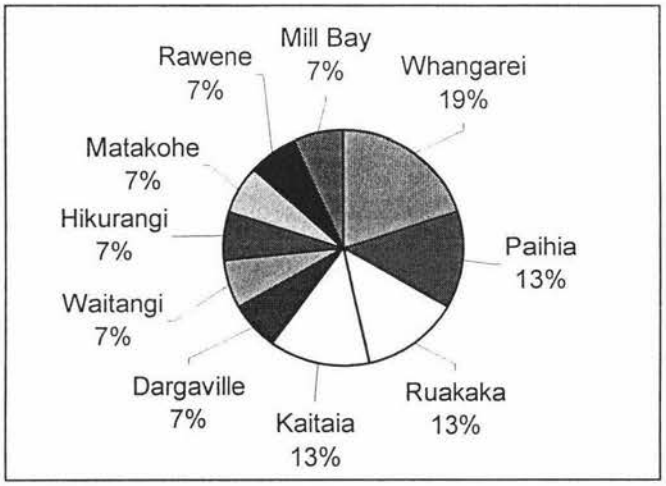
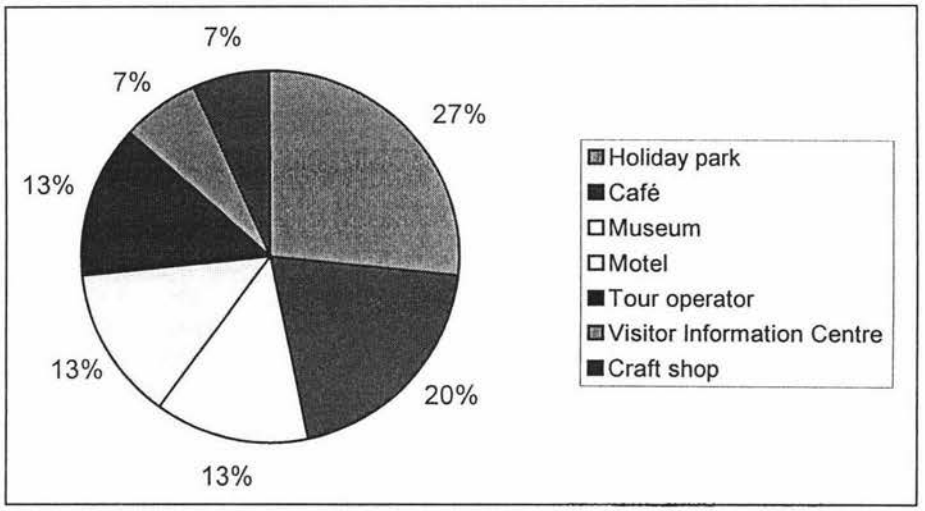


Figure 7.5: Participating businesses by type



effectiveness. It may also be key to understanding any overcrowding Northland experiences over the summer season. Respondents were then asked why they had made use of their particular business (see Figure 7.6). These results offer an insight into the actual reasons why businesses are chosen. Positive word-of-mouth is again shown to be one of the most important forms of promotion available to tourism operators. Clear signposting near the business is also shown to be essential, as is an appearance in a popular guidebook.

Respondents were asked whether they had used the services of their particular business on other occasions. Only 36% of the sample had used the business's services before. This result shows that the majority of respondents were first-time users of their particular business. While this is most likely representative of visitors to the region rather than local residents, it does not necessarily represent first-time visitors to the region. It could just as likely be regular visitors that are trying a new business. Those that had used the business before were then asked how many times they had used it. The combined results for all business types appear in Figure 7.7. The two largest groups were those who had used the business only once before and those who had used the business more than ten times. The questionnaire was able to be filled in by local residents as well as visitors and the largest grouping may be the result of this.

7.6 Important attributes of participating businesses

Respondents were asked to rate how important a number of factors were in evaluating their particular business. The ratings were recorded using a seven point Likert scale from 'extremely important' to 'not important'. The combined results for all business types are shown in Table 7.1. It is the more intangible qualities that were rated as the most important. The 'attitude of staff towards customers' was deemed the most important attribute of the participating businesses. Similar attributes such as 'staff friendliness' and 'overall atmosphere' also rated highly. 'Cost', that might have been thought to be an important attribute, was ranked only second to last by respondents. These results give credence to the experiential nature of tourism, the idea that travellers are looking for experiences in their travels more than tangible products. While cost is an element in travel, it seems that visitors are more concerned by the quality of the experience they will have. In turn, if an operator can find ways to add value to the visitor's experience, the visitor seems likely to be prepared to pay the extra amount.

Figure 7.6: Why the services of the business were used

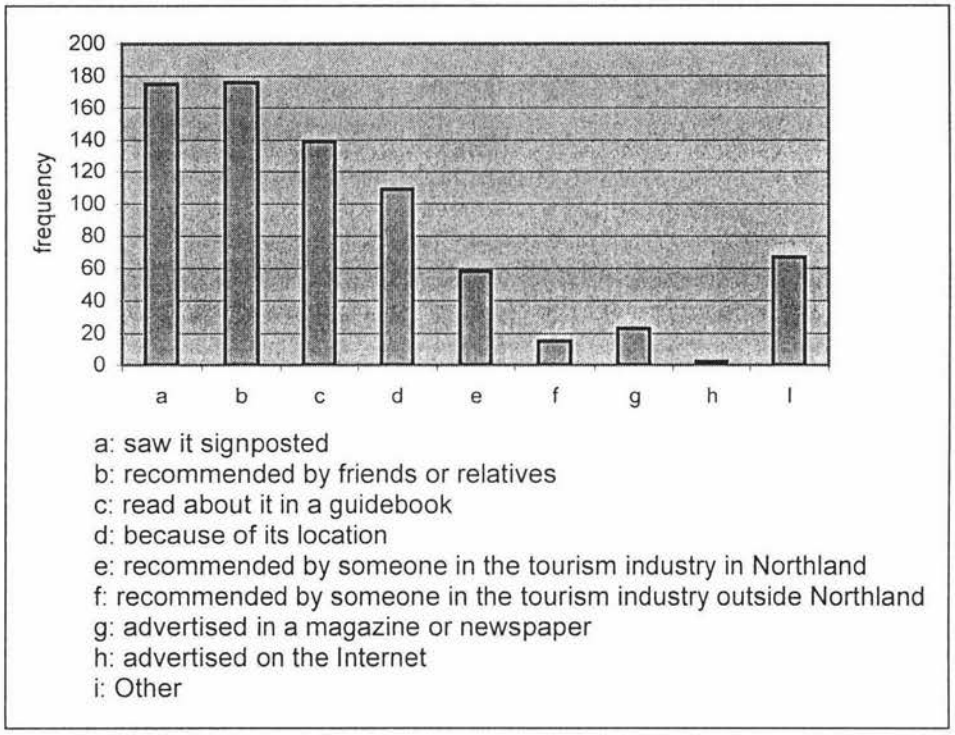


Figure 7.7: Number of times business had been used in the past

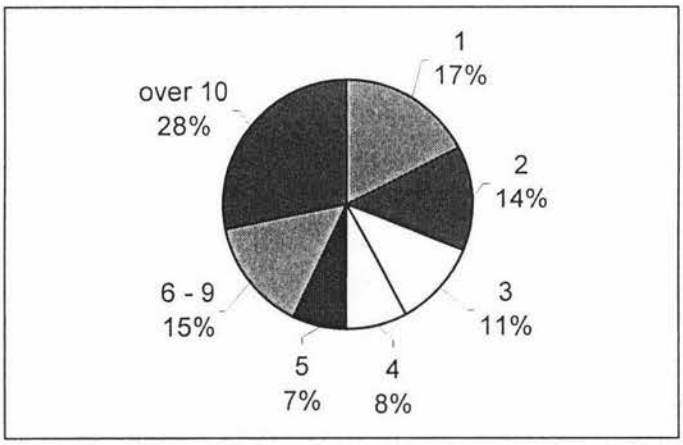


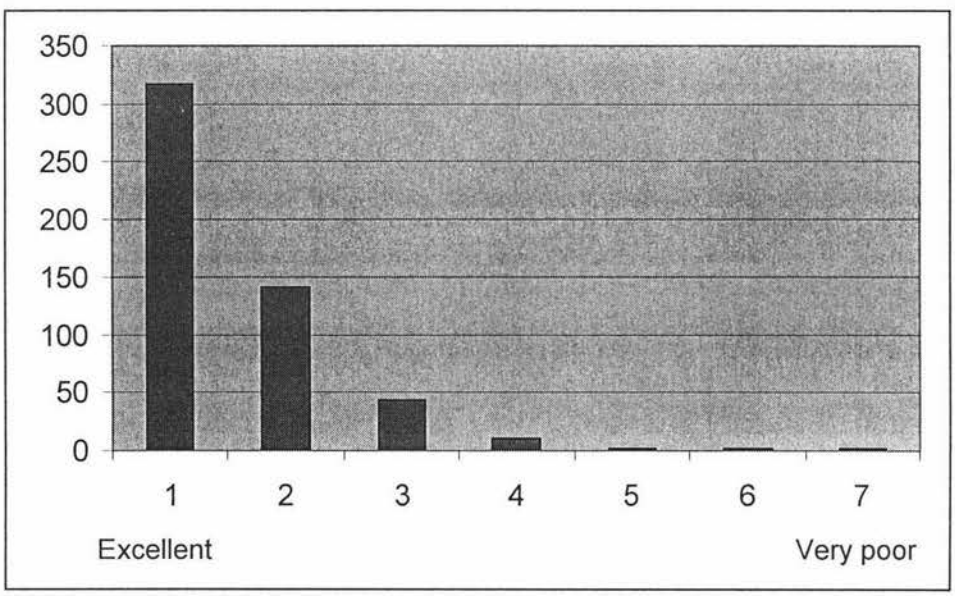
Table 7.1: Importance of various attributes of participating businesses (ranked by mean in order of importance)

Factor	mean
Attitude of staff towards customers	1.4502
Staff friendliness	1.4758
Overall cleanliness and hygiene	1.6286
Staff knowledge and competence	1.6369
Overall atmosphere	1.8474
Time taken for service to be provided	2.0744
Location	2.1004
Appearance of staff	2.3262
Cost	2.3288
Exterior appearance	2.5507

Table 7.2: Rating of established attributes of particular business (ranked by mean response in order of approval)

Factor	mean
Staff friendliness	1.3992
Attitude of staff towards customers	1.4747
Staff knowledge and competence	1.5658
Overall cleanliness and hygiene	1.5720
Overall atmosphere	1.6360
Time taken for service to be provided	1.7027
Appearance of staff	1.7536
Overall interior appearance	1.8330
Location	1.9197
Exterior appearance	2.0673
Cost	2.1044

Figure 7.8: Impression of particular participating business



Respondents were than asked to evaluate their particular business on these factors. This also took the form of a seven point Likert scale from 'extremely important' to 'not important'. The resulting ratings appear in Table 7.2. The similarity of the ranking of these attributes between the two tables suggests that the participating businesses are currently doing very well in meeting visitors' needs.

7.7 Impressions of participating businesses

Respondents were asked if they had had a negative experience with their particular business. Only 7% reported that they had had a negative experience and when asked to explain, the incidences all turned out to be minor in nature and in some cases, beyond the control of the operator. Respondents were then asked to rate their overall impression of their particular business (see Figure 7.8). In keeping with the low number of negative experiences reported, most businesses were given very high evaluations. Respondents were asked whether they would recommend the particular business to their friends (see Figure 7.9). This result is very pleasing for Northland's tourism-related businesses. Word-of-mouth has already been shown to be one of the most effective forms of promotion for a business and these businesses are clearly able to generate excellent word-of-mouth.

7.8 Respondents' Northland travel patterns

Respondents were asked how many times they had visited Northland in the previous three years (see Figure 7.10). It is somewhat unexpected that the proportion of respondents who had not been to Northland in the previous three years should be so high. At the other end of the scale, there is a reasonably large group that has visited Northland over 20 times in the last three years. Respondents were then asked about their plans for visiting Northland in the next year (see Figure 7.11). This result is interesting for the large number of respondents that do not know whether they will return to Northland in the next year. This is not unusual for international visitors for whom New Zealand is a long-haul destination, but it suggests that continual domestic travel to the same destination (usually as a result of owning a bach at the destination) is relatively uncommon.

7.9 Summary

This chapter examined a sample of customers of Northland's businesses. It was found that the experiences that visitors have of businesses in the region are generally extremely positive. This in turn showed the likelihood of generating positive word-of-

Figure 7.9: Likelihood of respondent recommending particular business to friends

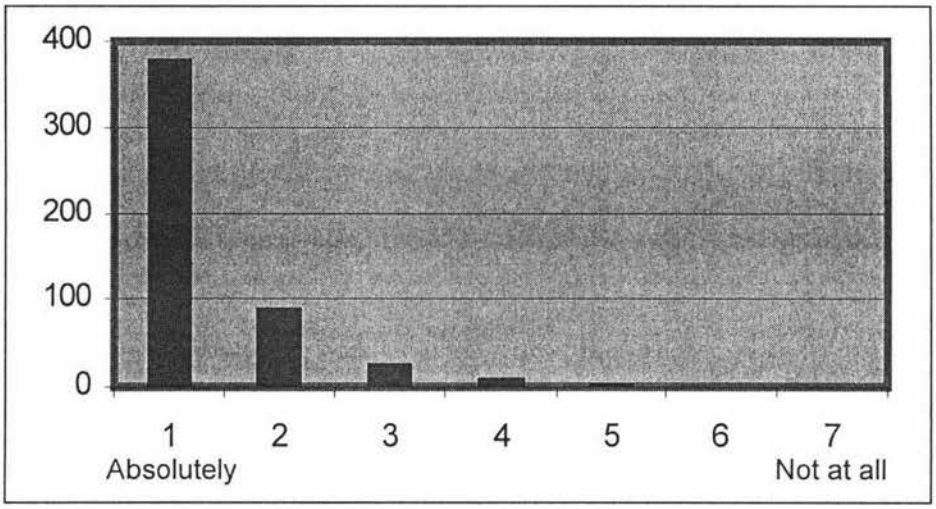


Figure 7.10: Respondents' past visitation to Northland

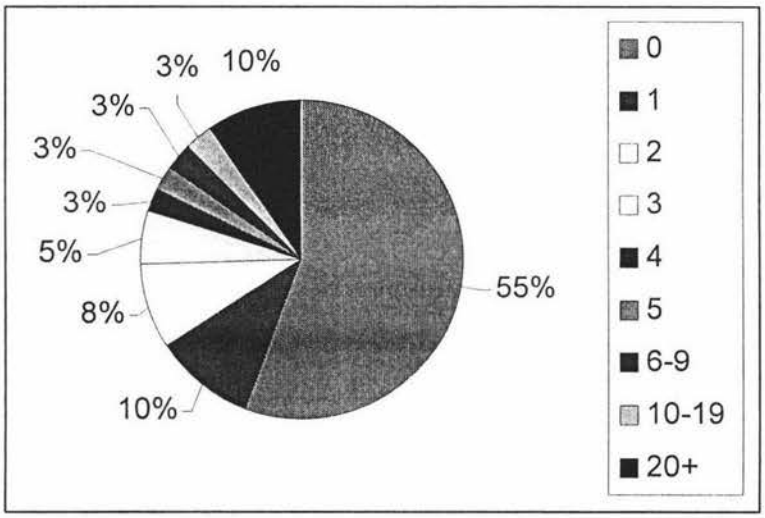
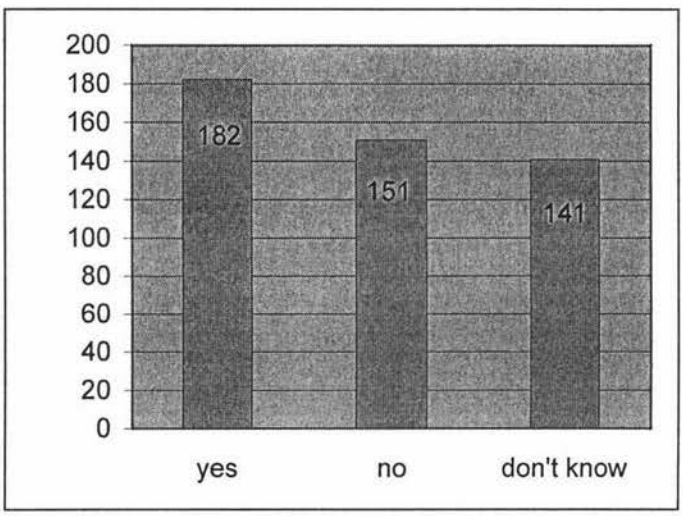


Figure 7.11: Plans for visiting Northland in the coming year



mouth. The study again showed how important Auckland is to the Northland region as a source of visitors but also showed the large range of nationalities which visit Northland. The study discovered that the methods customers use to determine which businesses to patronise has serious implications for the promotion of businesses in the region. The lack of prior knowledge and planning displayed by some visitors means that businesses may need to examine their current forms of promotion. Signposting was identified as the most effective method of direct promotion for many business types. This finding rather undermines the value of such forms of promotion as brochures and print advertising. While the majority of the sample had not previously visited the Northland region, the majority of the sample stated that they either would visit Northland again in the coming year or were not sure. The proportion that said they would not be visiting Northland again in the coming year is likely to contain many of the long-haul international visitors. The high levels of satisfaction with the businesses that visitors to the region reported is a very positive outcome for the region and provides a useful base for future development.

9. Implications

This thesis was able to examine Northland's tourism industry, particularly its seasonality issues, from both the supply and demand side. The surveys of Auckland residents and Northland visitors produced a range of data and findings on the demand aspects of seasonality. The survey of Northland's tourism-based businesses generated information on the often neglected supply side of the industry. When these results are viewed together they are able to form a very useful synthesis of tourism in Northland. Some of the implications of this holistic view of seasonality and the region's tourism industry now follow.

9.1 Seasonality

The major issue addressed was seasonality in Northland's tourism industry. The survey of Auckland residents produced useful information on the determinants of the timing of their domestic travel. The most influential determinants were found to be personal or family occasions and the respondent's work schedule. Unfortunately for Northland, both of these factors are beyond its control, short of promoting Northland as a wedding or other family gathering destination. The next most important factor and the first within the control of the industry, was accommodation and transport prices at the destination. Interestingly weather conditions at the destination, often believed to be the driving element of seasonality, ranked only fourth, behind cost for the timing of domestic travel. Age was found to be a significant factor in the determinants of the timing of domestic travel.

The months during which Auckland residents travel followed a typical demand distribution associated with seasonality with the highest levels of travel being over the summer period. The timing of domestic travel showed some interesting differences according to age. The timing of the residents' travel to Northland followed a very similar pattern which was in keeping with the region's image as a summer destination. There was a slight rise in visitation in June and July which suggested that there is already a proportion of domestic travellers which recognise Northland as a year-round destination and value the lack of crowds at this time. The pattern of Auckland residents' travel to Northland was closely matched by the pattern of tourism demand experienced by Northland's tourism-based businesses.

It was found that 50% of respondents to the survey of Auckland residents gave their main reason for travelling to Northland as 'holiday'. Traditionally, holiday travellers are

the most seasonal grouping and this result suggests that Northland's seasonality problems may be difficult to lessen. Visiting friends and relatives was another major reason for travel to Northland, followed by business travel. It was found that sex and age were significant factors in the reason for travelling to Northland. The majority of respondents to the survey of Auckland residents had visited Northland one to three times in the past year. The respondents that were found to visit Northland every year were asked if they visited the region at the same time every year. Only 31% said that they did which suggests that many Auckland residents may be open to change in the timing of their travel. The mean length of stay of the Auckland residents in Northland is approximately 3 nights. Clearly Northland is currently a short-break domestic location for Auckland residents. It was found that age was a significant factor in respondents' length of stay in Northland. It was clear from this result that there is a direct relationship between length of stay and available leisure time.

From a list of statements about the Northland region, Auckland residents most strongly agreed with the statement 'I would recommend Northland to friends and family'. This was a very positive result for Northland and showed that Auckland residents have positive experiences of the region. This means that whatever the ranking of the other statements, respondents would recommend Northland as a destination. It was interesting that the statement 'Northland is a great destination at any time of year' ranked reasonably highly at sixth place. This result is interesting when compared to the timing of Auckland residents' Northland travel. This suggests that although Auckland residents currently travel to Northland over the summer season, they are not entirely opposed to the idea of Northland as a year-round destination. This suggests that if respondents had more control over the timing of their domestic travel they may choose to visit Northland outside of the summer season. It may be that such factors as their work schedule mean that it is more convenient for them to travel during the summer season. It was determined that sex and age are significant factors in opinions of Northland.

All of the respondents to the business survey stated that they experienced seasonal patterns of demand which is not surprising given the months during which Auckland residents travel to Northland. The businesses were then asked to rate the magnitude of their seasonal demand patterns. None of the respondents picked either of the extreme rankings to describe the problems they experience because of seasonal demand. All of the respondents also stated that they have seasonal fluctuations in their income. Only 70%, however, said that this fluctuating income caused any

problems for their business. The actual problems experienced by this 70% were (in order of frequency) cost-spreading, training and retaining staff, upgrading facilities, and long-term planning. It was found that excess capacity during the low season was the main capacity problem for business respondents. This supported the view that the under-utilisation of resources is one of the greatest costs of seasonality facing operators.

Business respondents were asked about the effect seasonality had on their staffing levels and their responses showed quite significant effects. The biggest variations in seasonal staffing levels were seen in restaurants and cafes, and tour operators. Solely tourism-based operations that cater mainly to non-locals, such as tour operators, seem to be the most effected by seasonality. These results showed how important seasonality is to employment in the tourism industry. It also shows the scope of the problems that may be created for Northland society by seasonal unemployment.

Over three quarters of business respondents expressed a desire to have an even pattern of demand throughout the year rather than their present seasonal one. Three quarters of these respondents were currently attempting to develop a more even pattern of demand. The two most commonly used methods of doing this were found to be offering discounts over the low season and increasing advertising over the low season.

Business respondents were asked to estimate the composition of their trade by local, domestic, and international customers. It was found that in terms of seasonality in the domestic tourism market the most susceptible businesses (i.e. those whose customer base is largely domestic) are hotels, motels, souvenir or gift shops, and museums.

It was found that the majority of accommodation types usually used by Auckland while in Northland were low expenditure in nature. This suggested that Northland is not attracting high-spending Auckland visitors which means that their expenditure in other areas of their Northland visit is probably not very high either. It was found that age is a significant factor in the choice of accommodation in Northland.

Auckland residents were asked which areas of Northland they had visited. The result was a much more even distribution of visitation in Northland than might have been expected. Although domestic visitors travel to more remote areas, they have a lower daily and total expenditure than international visitors. This means that although domestic visitors seem to be benefiting the more remote areas of Northland, they may

not be contributing very much to the economies of these areas. It was found that age had a significant affect on the areas visited by respondents.

Auckland residents were asked how competitive Northland was compared to other domestic destinations. It was found that while Northland did not compare unfavourably with other domestic destinations, respondents were not overly impressed with Northland's competitiveness either.

Northland visitors were asked to rate how important a number of factors were in evaluating the business at which they completed the survey. Interestingly it was the more intangible qualities that were rated as the most important. The 'attitude of staff towards customers' was deemed the most important attribute of the participating businesses. These results support the experiential nature of tourism, the idea that travellers are looking for experiences in their travels more than tangible products. Respondents were then asked to evaluate their particular business on these factors. The similarity of the ranking of these attributes between the two tables suggests that the participating businesses are currently doing well in meeting visitors' needs.

9.2 Low season inducements

An important part of this study examined how Auckland visitors might be prompted to travel domestically during a destination's low season. A list of inducements to travel in the low season was drawn up and the same list was presented to both Auckland residents and Northland's tourism-related businesses. These groups were asked to rate which inducements would be the most effective in prompting low season travel. A comparison of the results given by the groups provides a very interesting insight into the disparities that exist between what consumers want and what businesses are supplying.

Auckland residents left no doubt as to what they felt were the most effective inducements. Discounted accommodation rates was by far the most popular answer, followed by discounted transportation rates. The staging of a special event was ranked third and was the highest rated of the factors that did not rely on discounting. The staging of a special event ranked higher than all-weather attractions. This suggested that Auckland residents may be prepared to brave inclement weather for the right special event. Age was found to be an important differentiating factor in the effectiveness of the various inducements. Special events were shown to appeal most to people between 18 and 25 years of age. Surprisingly this youngest age group,

traditionally thought to seek independent travel, were more likely to be attracted by package tours.

Business survey respondents were asked to rate the effectiveness of the same list of inducements in attracting visitors to Northland during the low season. The businesses thought that 'staging a special event' would be the most effective inducement. This was followed by 'large-scale advertising campaigns' and 'staging a special sporting event'. The inducements of 'discounted accommodation rates' and 'discounted transportation rates' were ranked second-to-last and last respectively by the businesses. The disparity of the businesses' opinions with those of Auckland residents gave an insight into possible reasons for the current inability of businesses to lessen seasonality. Businesses must learn to meet the wants of the travellers to overcome seasonality.

9.3 Promotion

Respondents to the survey of Auckland residents ranked the desirability of various factors in a domestic destination. The result was not surprising and supported the traditional view of the elements that are important to holidaymakers. Landscape, weather conditions, and low transport and accommodation costs rated highly. Unpredictable weather, the presence of other tourists, and high accommodation/transport costs were considered unattractive. Age was shown to be an important differentiating factor. These results showed how inefficient a mass-marketing approach to tourism promotion may be when the wants of various groups are so different. In particular, they indicated that careful targeting of niche groups is a more cost effective solution to product promotion.

Auckland survey respondents were asked about the factors that lead them to choose a domestic destination. The most influential factor was found to be 'visiting friends and relatives'. The second most influential factor was a 'recommendation from a friend or relative'. The third ranked factor was 'a previous visit to the destination' which suggested that Auckland residents prefer to visit domestic destinations with which they are familiar. The survey of Auckland residents found that the most effective form of promotion was found to be a feature article in a newspaper's travel section, a travel magazine, or a television travel show. This supported the belief that the public see such articles as being more trustworthy than direct advertising. Travel agents' recommendations were viewed as being worth even less than the destination's own advertising. The Internet was the least important of these factors in choosing a

domestic destination. Women were found to be more influenced by advertising than men. They were also shown to be more likely to travel to visit friends and relatives.

These results illustrated the inefficiency of mass marketing a destination rather than targeting marketing to different age groups. That people under 25 are significantly more influenced by a recommendation from a friend or a relative shows how important it can be for this age group to visit 'socially acceptable' or 'trendy' destinations. Any form of advertising was significantly less important for the highest age group while 'visiting friends and relatives' is significantly more important for this group. The business survey respondents were asked which forms of advertising they used to promote their business. It was found that the businesses believed brochures to be one of the more effective methods of advertising open to them. A relatively large proportion of business respondents said that they used the Internet as a way of advertising their business. These results are interesting when compared to those of the survey of Auckland residents.

Respondents to the survey of visitors to Northland were asked whether they had been aware of the participating business before they used it that day. The result suggests that in most cases the usage of the business was not preplanned. This result has implications for the promotion used by the businesses in terms of necessity and effectiveness. Respondents to the survey of visitors to Northland were then asked why they had made use of their particular business. Word-of-mouth was again shown to be one of the most important forms of promotion for tourism operators. Clear signposting near the business was also shown to be essential, as was an appearance in a popular guidebook.

9.4 Visitor Information Network

Respondents to the Northland section of the survey of Auckland residents were asked about their awareness and usage of New Zealand's Visitor Information Network. It was found that 83% of respondents were aware of the Network and 67% had made use of it. It was also found that having a Visitor Information Centre made little difference to the visitation levels an area experienced. Significant differences were tested for between the sexes, age groups, and income levels. It was found that sex, age and income were not significant factors in the awareness of the Visitor Information Network. Age was a significant factor, however, in the usage of the Visitor Information Network. It was determined that respondents aged between 26 and 45 were significantly less likely to have used the services of a VIC, and that respondents over the age of 66 were

significantly more likely to have used the services of a VIC. Respondents to the survey of Northland businesses were asked about their membership of New Zealand's Visitor Information Network. It was found that 95% of respondents were members of at least one Centre. Respondents were found to think that their membership of the Visitor Information Network was reasonably helpful to them.

This thesis has been able to provide an holistic study of several under-researched topics in tourism research in this country: seasonality, the domestic tourism industry, and tourism in Northland. It is hoped that the information contained in this thesis will allow tourism planners, operators, and perhaps tourists themselves to gain a more detailed understanding of tourism seasonality, its causes, and how to manage it effectively.

10. Conclusions

The existing literature on seasonality as it relates to the tourism industry is sparse and generally quite weak in nature. As Allcock (1994, p.86) has noted, seasonality "is at the same time one of [the tourism industry's] most widely recognised and least well researched features". This is surprising given the importance of seasonality to tourism and its impact on the tourism industry worldwide. The lack of research into this important issue may have led to assumptions about seasonality's causes and remedies which have been adopted and perpetrated throughout the literature and within destination areas. Indeed Bull (1995, p.44) states that "given that seasonality is largely institutionalised or directly affects major characteristics of the product (to do with climate), many bounds on demand are not variable by price or marketing inducements [sic]". This statement is typical of the tendency of tourism researchers to view seasonality as a seemingly inevitable characteristic of the industry that must be endured by operators. While elements of this view may eventually prove to be correct due to climatic and physical constraints on tourism operations, there is no way of knowing without continued research into the area of whether such assumptions and widely held views are in fact redundant. Some of the assumptions that are contained in the existing literature (particularly those concerning the encouragement of low season travel) have been questioned by this thesis. Each new piece of research has the potential to add depth to the existing knowledge of that topic and to accept or refute some of the commonly held assumptions. The general lack of research effort into seasonality means that there is great scope for the development of the knowledge base of this important issue through further research.

This study has been able to provide a range of primary and secondary data on tourism seasonality from both the demand and supply sides of tourism. This engenders a more holistic approach so that a more complete image of tourism seasonality could be developed from this thesis. To date, many of the studies undertaken on seasonality do not examine the problem in its totality: they usually examine the constituent parts of either demand of supply. Much of the information generated by this study is general enough in nature to allow it to be easily applied to other tourism markets and regions. The problems created by seasonality seem to be similar at a global scale although the direct causes of seasonality may vary from region to region. Any region that is severely affected by seasonality should be aware of the existing research into the issue but should ideally conduct its own research tailored to identify its specific seasonality-related problems, their exact causes, and which remedies would be the most effective in its

particular situation. Relying too heavily on research pertaining to other destinations may actually serve to increase the misunderstanding of the region's own particular issues.

Focusing this study on New Zealand's Northland region was an important element of the study as this region's tourism industry is perceived nationally as one which is highly seasonal. Northland provides an excellent case study to illustrate the problems that can be created by seasonality, the causes of these problems, and the methods that are commonly being used to deal with them. The survey of Northland's tourism-based businesses illustrated the lack of understanding that can exist between operator and consumer. This thesis was able to demonstrate the inherent dangers of this lack of understanding in terms of operators missing opportunities that may be present in their markets. Of particular concern were the great disparities that existed between suppliers and consumers in their views on two particular topics. The first topic was which factors were most effective in encouraging low-season travel, and the other was the methods of promotion currently being used by Northland's tourism-based businesses. A further important point to arise from this study was that the most significant differentiating factor within the sample of Auckland residents was age. The study showed how ineffective a blanket approach to marketing can be when the wants and needs within the population can differ to such an extent. This need for niche marketing in the promotion of destinations could be well developed with further research into the most effective methods of reaching these different market segments.

Given that Bonn et al (1992, p.109) describe tourism seasonality as "perhaps the most pervasive problem confronting...managers of tourism businesses", understanding seasonality may be the key to the success or failure of many tourism-related businesses. The first step to lessening seasonality's effects is to understand why this seasonal pattern of demand is occurring and how consumers might be encouraged to become visitors and clients of such businesses to help them overcome seasonality. As is the case with many (if not most) destinations, Northland's tourism-based businesses have yet to recognise this important synergy in harnessing the power of the tourism consumer. If Northland's tourism operators were able to gain a better understanding of seasonality, its causes and possible remedies, the implications for the region's tourism industry are immense. If Northland were able to lessen its tourism seasonality and transform itself into a year-round destination its tourism industry could be used to lead a revitalisation of the region's entire economy.

Only through further research can seasonality of demand be understood and more effectively combated. Examining seasonality is important for so many areas of the

tourism industry as it "has long been recognised as one of the most distinctive features of tourism, and indeed, after the movement of people on a temporary basis, may be the most typical characteristic of tourism on a global basis" (Butler, 1994, p.332). Further research into the issue of seasonality may benefit from taking a closer look at the demand side of the issue rather than adding to the host of case studies documenting struggling suppliers. One area of this study that could be developed in further research is the question of which factors are most effective in attracting visitors to a destination during its low season. Perhaps a more qualitative approach to a sample of Auckland residents would add more detail and depth to this information and reveal some unexpected possibilities in terms of generating a more even pattern of demand. An increased understanding of the wants and needs of the travellers themselves can only have positive results for the industry as a whole

Another area that offers scope for further research is examining the positive aspects of seasonality as discussed in section 2.6. While spreading demand outside a destination's high season has unquestionable advantages for tourism operators and tourists, a destination must ensure that this strategy does not come at the expense of the local environment (Allcock 1994). As discussed in section 2.6, a destination's low season can provide a welcome respite for the local population and environment from the stresses of the high season and there are many examples of part-time tourism operators who seek lifestyle change so as not to operate a business all-year round. In the haste of some destinations to even out their demand patterns, the value of such a rest period may be underestimated. The ideal situation should be to find the balance between the destination's economic needs and its possible needs for a time of recuperation, where a cluster of all-year round attractions, facilities and activities can provide a basis for a sustainable tourism business that is expanded in the peak season.

A further potential area for research is special event tourism in New Zealand and how it might be best used to combat seasonality. As discussed in section 3.4.1 special events already play an important role in New Zealand's tourism industry. More detailed research into the types, timing, and location of special events in relation to combating seasonality may prove worthwhile, particularly in the case of Northland. Clearly the present paradoxical situation of there being such a lack of research into one of tourism's most important features means that there is enormous scope for further research into so many areas of tourism and seasonality. BarOn (1975, p.2) has long recognised the importance of research into tourism seasonality and aptly states that the understanding of the determinants of seasonality "is important for all responsible for tourism".

References

Allcock, J. (1994). Seasonality. In Witt, S. & Moutinho, L. (Eds.). (1994). Tourism Marketing and Management Handbook (2nd ed.). Hemel Hempstead: Prentice Hall International.

Anon. (1996). Advanced Leisure and Tourism. Oxford: Oxford University Press.

Ball, R. (1988). Seasonality: a problem for workers in the tourism labour market. Service Industries Journal. 8(4), 501-513.

BarOn, R. (1975). Seasonality in Tourism: A Guide to the Analysis of Seasonality and Trends for Policy Making. London: Economist Intelligence Unit Limited.

_____ (1999). The Measurement of Seasonality and its Economic Impacts. WTO World Conference on The Measurement of the Economic Impact of Tourism, Nice (June), WTO.

Bonn, M., Furr, H. & Uysal, M. (1992). Seasonal variation of coastal resort visitors: Hilton Head Island. Journal of Travel Research, 31(1), 50-56.

Bull, A. (1995). The Economics of Travel and Tourism. (2nd ed.). Melbourne: Longman Australia Pty Ltd.

Butler, R. (1994). Seasonality in tourism: Issues and problems. In A. V. Seaton, C. Jenkins, R. Wood, P. Dieke, M. Bennett, L. MacLellan & R. Smith (Eds.), Tourism: The State of the Art (pp. 332-339). Chichester: John Wiley and Sons.

Chazaud, P., Chaspoul, C. Molinari, P. Barre, J. & Juyaux, C. (1991). What remains of seasonality? Cahiers Espaces, 109, pp. 3-33.

Clark, E., Brock, T. & Stewart, D. (1994). Attention, Attitude, and Affect in Response to Advertising. New Jersey: Lawrence Eribaum Associates.

Collier, A. (1994). Principles of Tourism: A New Zealand Perspective. (3rd ed.). Auckland: Longman Paul.

Collier, A & Harraway, S. (1997). The New Zealand Tourism Industry (2nd ed.). Auckland: Addison Wesley Longman.

Conlin, M. (1997). Rejuvenation planning for island tourism: the Bermuda example. In France, L. (Ed.), Sustainable Tourism (pp. 232-238). London: Earthscan Publications Ltd.

Cooper, C., Fletcher, J., Gilbert, D. & Wanhill, S. (1993). Tourism: Principles and Practice. London: Pitman Publishing.

Craik, J. (1991). Resorting to Tourism: Cultural Policies for Tourist Development in Australia. Sydney: Allen & Unwin Pty Ltd.

Fau, F. (1996). Business tourism and the Internet. Cahiers Espaces, 45, pp. 112-117.

Getz, D. (1997). Event Management and Event Tourism. New York: Cognizant Communication Corporation.

Hall, C.M. & McArthur, S. (eds) (1996). Heritage Management in Australia and New Zealand. Melbourne: Oxford University Press.

Hall, C.M. & Page S.J. (1999). The Geography of Tourism and Recreation: Environment, Place and Space. London: Routledge.

Hennessy, S. (1997). Female employment in tourism development in south-west England. In France, L. (Ed.), Sustainable Tourism (pp. 151-156). London: Earthscan Publications Ltd.

Kelly, J. & Marshall, B. (1996). Atlas of New Zealand Boundaries. Auckland: Auckland University Press.

Laws, E. (1995). Tourist Destination Management: Issues, Analysis & Policies. London: Routledge.

Lawson, R., Williams, J., Young, T., & Cossens, J. (1998). A comparison of residents' attitudes towards tourism in 10 New Zealand destinations. Tourism Management, 19(3), 247-256.

McEniff, J. (1992). Seasonality of tourism demand in the European Community. Travel & Tourism Analyst, 3, 67-88.

Mathieson, A. & Wall, G. (1982). Tourism: Economic, Physical and Social Impacts. Harlow: Longman.

Metservice. (1999). New Zealand Meteorological Service: Summary of Climate Observations, 1969-1998. Website. (http://www.metservice.co.nz/knowledge/data_climate_summaries.asp. (September 13 1999).

Middlebrook, L. (1999, November 27-28). Tourists flock back. The New Zealand Herald, pp.E1-2.

Mill, R. & Morrison, A. (1985). The Tourism System: An Introductory Text. New Jersey: Prentice Hall.

_____ (1992). The Tourism System. (2nd ed). New Jersey: Prentice Hall.

Moir, R., Collen, B, & Thompson, C. (1986). The Climate and Weather of Northland. Wellington: New Zealand Meteorological Service.

New Zealand Tourism Board. (1996). Tourism in Northland: A Draft Strategy for Sustainable Growth and Development. Wellington: New Zealand Tourism Board.

New Zealand Tourism Department. (1991). New Zealand Domestic Travel Study 1989/90, General Report. Wellington: New Zealand Tourism Department.

New Zealand Tourist and Publicity Department. (1989). New Zealand Domestic Travel Study 1988/89, General Report. Wellington: New Zealand Tourism and Publicity Department.

Northland United Council. (1983). Northland Regional Planning Scheme: Second Draft, Principal Section. Whangarei: Northland United Council.

O'Connor, P. (1999). Electronic Information Distribution in Tourism and Hospitality. Wallingford: CAB International.

O'Driscoll, T. (1985). Seasonality in the Trans-Atlantic vacation market. Annals of Tourism Research, 12(1), 109-111.

Page, S. (1995). Urban tourism. London: Routledge.

_____ (1999). Auckland, City Report. 1(2), pp. 1-18.

Page, S., & Forer, P. (1998a). Tourism in Tai Tokerau: General patterns and Maori perspectives. In The James Henare Maori Research Centre, Sustainable Maori tourism in Tai Tokerau: The south Hokianga and Kaikohe regions (pp. 289 – 358). Auckland: Auckland University.

_____ (1998b). Small business development and tourism in Northland. In The James Henare Maori Research Centre, Sustainable Maori tourism in Tai Tokerau: The south Hokianga and Kaikohe regions (pp.359 – 411). Auckland: Auckland University.

Page, S., Forer, P., & Lawton, G. (1999). Small business development and tourism: *Terra incognita*? Tourism Management, 20(4), 435-460.

Page, S., & Getz, D. (Eds.). (1997). The Business of Rural Tourism: International Perspectives. London: International Thompson Business Publishing.

Page, S. & Hall, C.M. (1999). New Zealand, International Country Report. 4, pp. 71-99.

Rotzoll, K., & Haefner, J. (1996). Advertising in Contemporary Society. Chicago: Board of Trustees of the University of Illinois.

Ryan, C., Smee, A., Murphy, S., & Getz, D. (1998). New Zealand events: A temporal and regional analysis. Festival Management and Event Tourism, 5, 71-83.

Saleem, N (1992). Seasonality in tourism: a curse or God-sent strategy. Tourism in Europe: the 1992 conference, Durham (July). Centre for Travel and Tourism, Houghton Le Spring, UK.

Sharma, S. (1996). Applied Multivariate Techniques. New York: John Wiley & Sons.

Statistics New Zealand. (1997a). 1996 Census: Regional Summary. Wellington: Statistics New Zealand.

_____ (1997b). 1996 Census: Population and Dwelling Statistics. Wellington: Statistics New Zealand.

_____ (1999a). Commercial Accommodation monitor for Destination Northland: December 1998. Wellington: Statistics New Zealand.

_____ (1999b). Key Statistics: August 1999. Wellington: Statistics New Zealand.

Telstra Business. (1999). Channel One, Television New Zealand, Auckland. November 4.

Thompson, W. (1999). Just a fantastic answer to scoffers. The New Zealand Herald, July 13, p. A1.

Thorne, J. (1999, November). Back home – rediscovering the twin coasts. AA Directions, p.28.

Witt, S., Brooke, M. & Buckley, P. (1991). The Management of International Tourism. London: Unwin Hyman Ltd.

Appendix A: Auckland Residents Questionnaire

MASSEY
UNIVERSITY

A L B A N Y

COLLEGE OF BUSINESS

Travel Habits of Auckland Residents.

1. Are you: Male ☐ (please tick appropriate box)
   Female ☐

2. Which of these age groups do you fit into? (please tick appropriate box)

Under 25 years	☐	36-45 years	☐	56-65 years	☐
26-35 years	☐	46-55 years	☐	over 66	☐

3. Which bracket does your annual income fall into? (please tick appropriate box)

Less than NZ $20,000	☐	NZ $40,001 – NZ $50,000	☐
NZ $20,001 – NZ $30,000	☐	NZ $50,001 – NZ $60,000	☐
NZ $30,001 – NZ $40,000	☐	Over NZ $60,000	☐

4. Have you visited another country in the last year?

yes ☐ no ☐

5. Have you visited another part of New Zealand in the last year?

yes ☐ no ☐

6. Would the following factors make you more or less likely to visit an area of New Zealand? (please circle one number for each row)

	More likely				Less likely
fine weather	1	2	3	4	5
beautiful natural scenery	1	2	3	4	5
lots of other tourists	1	2	3	4	5
suitability for families	1	2	3	4	5
good local transport	1	2	3	4	5
unpredictable weather	1	2	3	4	5
staging of a special event	1	2	3	4	5
high accommodation/transport costs	1	2	3	4	5
wide range of attractions	1	2	3	4	5
lots of activities for children	1	2	3	4	5
friendly local residents	1	2	3	4	5
few other tourists	1	2	3	4	5
historical attractions	1	2	3	4	5
peace and quiet	1	2	3	4	5
low accommodation/transport costs	1	2	3	4	5

Centre for Tourism Research
Private Bag 102 904, North Shore MSC, Auckland, New Zealand
Telephone +64-9-441 8115 Facsimile +64-9-441 8109

poor local transport	1	2	3	4	5
lots of outdoor activities	1	2	3	4	5
lots of indoor activities	1	2	3	4	5

7. During which months do you usually travel within New Zealand? (please tick as many as needed)

January	☐	April	☐	July	☐	October	☐
February	☐	May	☐	August	☐	November	☐
March	☐	June	☐	September	☐	December	☐

8. This travel tends to be to a New Zealand area:

during its busy time ☐ during its slow time ☐ don't know ☐

9. How effective would each of the following factors be in prompting you to travel to a destination in its slow time of year? (please circle one number for each row)

	Very effective				Ineffective
discounted accommodation rates	1	2	3	4	5
the staging of a special event	1	2	3	4	5
large scale advertising campaigns	1	2	3	4	5
all-inclusive package tours	1	2	3	4	5
the staging of a special sporting event	1	2	3	4	5
discounted transportation rates	1	2	3	4	5
attractions that don't rely on the weather	1	2	3	4	5

10. How important are each of these factors in determining when you take a holiday within New Zealand? (please circle one number for each row)

	Very important				Not important
your work schedule	1	2	3	4	5
public holidays	1	2	3	4	5
school holidays	1	2	3	4	5
weather conditions at the destination	1	2	3	4	5
the destination holding a sporting event	1	2	3	4	5
accommodation and transport prices	1	2	3	4	5
personal/family special occasions	1	2	3	4	5
the destination staging a special event	1	2	3	4	5

11. How important are each of these factors in determining when you take a holiday in another country? (please circle one number for each row)

	Very important				Not important
your work schedule	1	2	3	4	5
public holidays	1	2	3	4	5
school holidays	1	2	3	4	5
weather conditions at the destination	1	2	3	4	5
the destination holding a sporting event	1	2	3	4	5
accommodation and transport prices	1	2	3	4	5
personal/family special occasions	1	2	3	4	5

the destination staging a special event	1	2	3	4	5

12. How important are these factors in choosing a holiday destination within New Zealand?

	Very important				Not important
previous visit to destination	1	2	3	4	5
friends or relatives living at the destination	1	2	3	4	5
recommendation from a friend or relative	1	2	3	4	5
recommendation from a travel agent	1	2	3	4	5
brochure from the destination	1	2	3	4	5
television advertising of destination	1	2	3	4	5
information gained from an Internet site	1	2	3	4	5
other advertising of destination	1	2	3	4	5
featured in newspaper/magazine travel article or television show	1	2	3	4	5

13. Have you visited the Northland region in the last year?

yes ☐ no ☐

If yes, please answer the following questions. If no, thank you for your time, please return the completed questionnaire in the supplied envelope.

14. What is the main reason for your traveling to Northland? (please tick as many as necessary)

Attend or participate in sporting events ☐ Business ☐

Visit friends/relatives ☐ Holiday ☐

Attend a special event ☐

15. How many times have you visited Northland in the last year?

1 – 3 ☐ 7 – 9 ☐ 13 – 15 ☐ more than 18 ☐

4 – 6 ☐ 10 – 12 ☐ 16 – 18 ☐

16. Do you visit Northland every year?

yes ☐ no ☐

17. If yes, do you tend to visit Northland at the same time every year?

yes ☐ no ☐

18. If yes, during which months do you usually visit Northland? (please tick as many as needed)

January ☐ April ☐ July ☐ October ☐

February ☐ May ☐ August ☐ November ☐

March ☐ June ☐ September ☐ December ☐

19. How many nights do you usually spend in Northland?

1 – 3 ☐ 7 – 9 ☐ 13 – 15 ☐ more than 18 ☐

4 – 6 ☐ 10 – 12 ☐ 16 – 18 ☐

20. Has the length of your stay in Northland been affected by the weather at any time?

yes ☐ no ☐

21. Which forms of accommodation do you usually stay in while in Northland?

with friends/relatives ☐	hotel ☐	backpackers hostel ☐
holiday home/bach ☐	motel ☐	bed and breakfast ☐
caravan/camping site ☐	boat ☐	luxury lodge ☐
other (please specify) ☐		

22. Which areas of Northland have you visited?

Kerikeri ☐	Tutukaka ☐	Waipu ☐	Doubtless Bay ☐
Kaitaia ☐	Whangarei ☐	Paihia ☐	Cape Reinga ☐
Dargaville ☐	Kaikohe ☐	Russell ☐	Hokianga Harbour ☐

Others.....

23. Are you aware of the Visitor Information Centre network as a source of visitor information?

yes ☐ no ☐

24. Have you ever used the services of a Visitor Information Centre?

yes ☐ no ☐

25. Are you aware of the highway in Northland called the Twin Coast Discovery Route?

yes ☐ no ☐

26. How competitive is Northland as a New Zealand destination in the following areas? (please circle one number for each row)

	Very competitive				Not very competitive
accommodation costs	1	2	3	4	5
attractions/activities costs	1	2	3	4	5
transport costs	1	2	3	4	5
restaurant/cafe prices	1	2	3	4	5

27. Consider the following statements and circle one number for each row.

	Strongly agree				Strongly disagree
Northland has a wide range of outdoor activities	1	2	3	4	5
Northland is a great destination at any time of year	1	2	3	4	5
Northland's towns and attractions are too crowded	1	2	3	4	5
Northland is a very popular New Zealand destination	1	2	3	4	5
Northland has interesting historical attractions	1	2	3	4	5
Northland has a wide range of indoor activities	1	2	3	4	5
Northland offers value for money as a destination	1	2	3	4	5
Northland is a great destination for families	1	2	3	4	5
Northland is only worth visiting in the summer	1	2	3	4	5
I would recommend Northland to friends and family	1	2	3	4	5

Thank you for taking the time to answer these questions, please return your completed questionnaire in the supplied envelope.

Appendix B: Northland Businesses Questionnaire

MASSEY
UNIVERSITY

A L B A N Y

COLLEGE OF BUSINESS

Seasonality in Northland's Tourism-based Businesses

1. What is the primary tourist-related activity of this business?

Hotel	☐	Adventure tourism	☐
Motel	☐	Visitor attraction	☐
Backpackers hostel	☐	Museum	☐
Farmstay/homestay	☐	Bus/coach operator	☐
Restaurant/café	☐	Tour operator	☐
Lunchbar/coffee shop	☐	Travel agent	☐
Souvenir/gift shop	☐	Other.....	
		.....	
		.....	

2. Is this business:

Individually owned	☐	Part of a chain	☐
A franchised business	☐	Jointly owned	☐

Other.....

3. How many years has your business been in operation? .....

4. Which one of the following statements best describes your motivations for owning/operating this business?

To do what I enjoy while making a living	☐
To make more money than by being employed by someone else	☐
Started because of redundancy or unemployment	☐
Semi-retired	☐
I like to have work over the busy season and a quiet off-season	☐
To be my own boss	☐

Other.....

5. Can you estimate what proportion of your income comes from locals, other domestics internationals?

Yes ☐
No ☐

Centre for Tourism Research
Private Bag 102 904, North Shore MSC, Auckland, New Zealand
Telephone +64-9-441 8115 Facsimile +64-9-441 8109

6. If yes:
   - Locals _____%
   - Other domestics _____%
   - Internationals _____%

7. Does your business have seasonal patterns of demand?
   - Yes ☐
   - No ☐

8. Which months are the busiest for your business?

January	☐	May	☐	September	☐
February	☐	June	☐	October	☐
March	☐	July	☐	November	☐
April	☐	August	☐	December	☐

9. Which months are the quietest for your business?

January	☐	May	☐	September	☐
February	☐	June	☐	October	☐
March	☐	July	☐	November	☐
April	☐	August	☐	December	☐

10. Are seasonal patterns of demand for your business:
    - A major problem ☐
    - Somewhat of a problem ☐
    - To be tolerated ☐
    - Of no concern ☐
    - A desirable situation ☐

11. How many people do you employ
    - During normal trading _____
    - At the busiest time of year _____
    - At the quietest time of year _____

12. Do you have seasonal fluctuations in your income?
    - Yes ☐
    - No ☐

13. Does this cause any problems for your business?

Yes ☐
No ☐

14. What form do these problems take?

Difficulties in training and retaining staff ☐
Difficulties in undertaking long term planning ☐
Difficulties in carrying out upgrades on facilities or equipment ☐
Difficulties in spreading costs ☐
Other.....
.....
.....
.....
.....
.....

15. Is this seasonality now more pronounced than it was:

	Yes	No
2 years ago	☐	☐
5 years ago	☐	☐
10 years ago	☐	☐

16. Does your business tend to be faced with empty facilities in the low season or a shortage of facilities in the high season? *i.e. Do you plan your number of rooms, seats, etc. on the number of customers you expect in the low season or in the high season?*

Empty in the low season ☐
Shortage in the high season ☐

17. What form would you like the pattern of demand for your business to take?

Seasonal ☐
Even throughout the year ☐

Other.....

18. Are you currently trying to develop a more even pattern of demand for your business?

Yes ☐
No ☐

19. What methods are you using to do this?

Using more advertising in the low season ☐
Offering discounts in the low season ☐

Other.....

20. Which forms of advertising do you use to promote this business?

Brochures ☐
Newspaper/magazine advertisements ☐
Television advertising ☐
Official visitor guides (AA, Jasons) ☐
Outside advertising (local billboards, signs) ☐
The Internet ☐
Other.....

21. Do you operate activities in the off season that are different to those of the busy season? *(e.g. central North Island snow fields promoting walking tracks to attract people in the summer)*

No ☐
Yes ☐ (please explain).....
.....
.....
.....
.....
.....

22. If yes, would you rather that you didn't have to do this but could just operate your primary activity year-round?

Yes ☐
No ☐

23. How effective do you think each of these measures would be in attracting off-season visitors to Northland? *(please circle one number for each row)*

	Very effective				Ineffective
Discounted accommodation rates	1	2	3	4	5
Staging a special event	1	2	3	4	5
Large scale advertising campaigns	1	2	3	4	5
All-inclusive package tours	1	2	3	4	5
A special sports event	1	2	3	4	5
Discounted transportation rates	1	2	3	4	5
All-weather attractions	1	2	3	4	5

24. What is your approximate annual turnover?

$.....

25. Are you a member of the following Visitor Information Centres?

	Yes	No
Whangarei	☐	☐
Paihia	☐	☐
Orewa	☐	☐
Warkworth	☐	☐
Omapere	☐	☐
Dargaville	☐	☐
Kaikohe	☐	☐
Kaitaia	☐	☐
North Shore City	☐	☐
Auckland Central	☐	☐

26. If yes, how helpful is this exposure to your business?

- Very helpful ☐
- Quite helpful ☐
- Somewhat helpful ☐
- Not very helpful ☐
- Not at all helpful ☐

27. Finally, is there anything else you would like to add on the subject of seasonality in Northland's tourism industry?.....

.....

.....

.....

.....

.....

.....

.....

.....

Thank you very much for taking the time to complete this questionnaire, your response will add to the depth and value of this study. Please return the questionnaire in the envelope supplied.

Appendix C: Visitor Satisfaction Questionnaire

MASSEY
UNIVERSITY

A L B A N Y

COLLEGE OF BUSINESS

(For office use only)
☐☐☐ (Org.)
☐☐☐ (No.)

Customer Satisfaction Questionnaire

Dear Customer,

The Centre for Tourism Research at Massey University Albany is conducting research into customer satisfaction levels for tourists in a number of different businesses in Northland and we would appreciate it if you would be willing to complete the following questionnaire. All replies will be confidential. Please hand the completed questionnaire to a staff member of this business.

1. Had you heard about this particular shop/service before you used it today?

Yes / No

2. Why did you use the services of this business? (You may tick as many as you wish)

Saw it signposted	☐
Recommended by friends or relatives	☐
Read about it in a guidebook	☐
Drove past it and stopped because of its location	☐
Recommended by someone in the tourism industry in Northland	☐
Recommended by someone in the tourism industry outside Northland	☐
Saw it advertised in a magazine or newspaper	☐
Saw it advertised on the Internet	☐
Other	☐

(Please explain) .....

3. Have you used the services of this particular business on other occasions?

Yes / No

If yes, how many times? 1 2 3 4 5 6-9 10+

4 For any business of this type, please rate the importance of the following factors to you personally.

	Extremely important			*Neutral*			*Not important*
Location	1	2	3	4	5	6	7
Exterior appearance	1	2	3	4	5	6	7
Overall cleanliness and hygiene	1	2	3	4	5	6	7
Overall atmosphere	1	2	3	4	5	6	7
Attitude of staff towards customers	1	2	3	4	5	6	7
Staff knowledge and competence	1	2	3	4	5	6	7
Staff friendliness	1	2	3	4	5	6	7
Appearance of staff	1	2	3	4	5	6	7
Time taken for service to be provided	1	2	3	4	5	6	7
Cost	1	2	3	4	5	6	7

Please turn over to complete

Centre for Tourism Research
Private Bag 102 904, North Shore MSC, Auckland, New Zealand
Telephone +64-9-443 8115 Facsimile +64-9-443 8109

5. How would you rate the performance of **this particular business** on the same factors.

	Extremely important			*Neutral*			*Not important*
Location	1	2	3	4	5	6	7
Exterior appearance	1	2	3	4	5	6	7
Overall interior appearance	1	2	3	4	5	6	7
Overall cleanliness and hygiene	1	2	3	4	5	6	7
Overall atmosphere	1	2	3	4	5	6	7
Attitude of staff towards customers	1	2	3	4	5	6	7
Staff knowledge and competence	1	2	3	4	5	6	7
Staff friendliness	1	2	3	4	5	6	7
Appearance of staff	1	2	3	4	5	6	7
Time taken for service to be provided	1	2	3	4	5	6	7
Cost	1	2	3	4	5	6	7

6. Did you have any negative experiences with regard to this business? **Yes / No**
If yes, please explain
.....
.....

If yes, did any staff member do anything to compensate for the problem ?
Yes / No
If yes, please explain .....

7. How would you rate your overall experience of this particular business? *(Please circle)*
(Excellent) *1 2 3 4 5 6 7* *(Very Poor)*

8. Would you recommend this tourism business to your friends?
(Absolutely) *1 2 3 4 5 6 7* *(Not at all)*

9. Is there anything else, either positive or negative that you would like to say about this business? .....
.....

10. What is your country of residence? .....
Which town or city do you live in? .....

11. What is your age?
(Please circle) Under 20 20-29 30-39 40-49 50-59 60+

12. What is your sex? Male ☐ Female ☐

13. What is your occupation? .....

14. How many other times have you visited Northland in the previous three years?
(Please circle)
0 1 2 3 4 5 6-9 10-19 20+

15. Do you plan to visit Northland again in the next year?
Yes ☐ No ☐ Don't know ☐

Thank you for completing this questionnaire. We trust you enjoy your stay in Northland