

Understanding the Value Created by Campervan Tourists in New Zealand

Authorship

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Executive summary

This report presents an analysis of the spending patterns and tourism behaviour of campervan tourists in New Zealand in 2011. The analysis is based on a sample of 1,719 responses to an online survey of campervan hirers. The results have been adjusted to exclude the impact of Rugby World Cup 2011 on expenditure and travel patterns.

The headline results for 2011 are:

- 63,930 campervan hires in calendar year 2011 - 10,220 by New Zealand residents and 53,710 by international visitors.
- Each domestic hire involved 2.1 adult occupants and each international hire involved 2.2 adult occupants.
- A total of 138,124 adults travelled in campervans in 2011 – 21,347 New Zealand residents and 116,776 international visitors.
- Domestic campervan occupants generated 194,453 visitor nights (9.1. nights per person) and international occupants generated 2,302,959 visitor nights (19.7 nights per person).
- Campervan occupants spent \$547.2 million in New Zealand including money paid to Air New Zealand.
- Total expenditure by campervan occupants was \$447.9 million excluding international airfares, comprising \$38.1 million by New Zealand residents and \$447.9 million by international visitors.
- New Zealand residents spent an average of \$1,787 per person (\$196 per night) and international visitors spent \$3,836 excluding international airfares (\$195 per night).

Table 1 Summary of New Zealand campervan sector in 2011

	New Zealand residents	International visitors	Total
Campervan units hired	10,220	53,710	63,930
Adults per campervan	2.1	2.2	2.2
Adult campervan occupants	21,347	116,776	138,124
Average length of trip	9.1	19.7	18.1
Adult visitor nights	194,453	2,302,959	2,497,412
Spend incl. Air NZ international airfares (\$m)	\$38.1	\$509.0	\$547.2
Spend excl. Air NZ international airfares			
Total (\$m)	\$38.1	\$447.9	\$486.1
Per adult campervan occupant	\$1,787	\$3,836	\$3,519
Per adult visitor night	\$196	\$195	\$195

1 Approach

This report is an output of the *Economic Value of Tourism* (EVT) project, a three year research programme funded by the Science and Innovation Group of the Ministry of Business, Innovation and Employment. The purpose of the EVT research is to develop a better understanding of how tourism creates value in the New Zealand economy.

In respect to campervan tourism, the EVT research has the following objectives:

1. Understand how campervan tourists spend money in New Zealand through direct and indirect purchases from New Zealand businesses. This is the demand-side component of the EVT research, which is the primary focus of this paper.
2. Understand how campervan tourism adds value to the New Zealand economy through the direct and indirect business activity it generates in the New Zealand economy. This will be achieved through an analysis of the financial structures of New Zealand businesses that transact with campervan tourists. This is the supply-side component of the EVT research, which falls outside the scope of this paper.

This report presents an analysis of the spending patterns and tourism behaviour of campervan tourists in New Zealand. The analysis is based on data collected in an online survey of campervan hirers between March 2011 and April 2012.

Spend was divided into the following categories:

1. Spend items in New Zealand during the campervan hire period e.g. campervan hire, site fees, fuel, other accommodation, transport, groceries, food/beverages in cafes, bars and restaurants, attractions and activities, and retail during the campervan hire period.
2. Spend items in New Zealand before/after the hire period e.g. accommodation, transport (including domestic airfares), fuel, groceries food/beverages in cafes, bars and restaurants, attractions and activities, and retail.
3. Spend on Air New Zealand international airfares.

1.1 Survey design & distribution

Covec designed and scripted an online survey in SurveyGizmo, a web-based online survey platform selected for its flexibility and ease of use. The survey collected information about length of stay in New Zealand, length of campervan hire period and spending. The question structures were informed by existing tourism surveys including the International Visitor Survey, the Convention Delegate Survey and various major event surveys that Covec has developed and implemented. A link to the online survey was distributed to campervan hirers as part of the post-hire follow-up process.

1.1.1 Sample

A total of 2,002 responses were received to the online survey. Respondents answering “yes” to whether they travelled to New Zealand for the Rugby World Cup were excluded to ensure that the results were representative of a normal year and the remaining 1,719 responses were used in the analysis. Breakdowns of these samples by country group, and comparisons with the population are provided in Table 2.

The population figures are based on actual hireage data supplied by several large campervan companies and estimated hireage activity for the remaining companies. The hireage estimates for the remaining companies were derived by projecting the utilisation rates of the known campervan companies onto the capacities of the unknown campervan companies based on campervan type: non-toilet/shower; 2 berth toilet shower; 4+ berth.

Table 2 Comparison of population and sample shares by country group

Country group*	Population (campervan units hired)	Share	Survey sample	Share
TOTAL	63,930	100%	1,791	100%
New Zealand	10,220	16%	428	24%
All international	53,710	84%	1,363	76%
Australia	18,310	29%	581	32%
United Kingdom	9,090	14%	244	14%
Germany	6,660	10%	84	5%
Netherlands	2,080	3%	51	3%
Other Europe	9,510	15%	159	9%
Americas	3,560	6%	97	5%
Other countries	4,500	7%	147	8%

*Derived from survey response for sample and driver’s license for population

1.1.2 Weighting

The per-adult estimates of expenditure and travel behaviour derived from the survey were weighted up to the population of adult campervan users in calendar year 2011 at the country group level.

The population of adult campervan users was established by combining the campervan hireage data (number of campervan units hired) with average occupancy data (number of occupants per campervan). Estimates of average occupancy were derived from the online survey which asked respondents how many adults they shared their campervan with.

2 Key findings

There were a total of 63,930 campervan hires in calendar year 2011 - 10,220 by New Zealand residents and 53,710 by international visitors. The average length of hire was 8.9 days for domestic hirers and 16.8 days for international hirers, generating 90,820 domestic hire days and 900,360 international hire days.

On average each domestic hire involved 2.1 adult occupants and each international hire involved 2.2 adult occupants. In total 138,124 adults travelled in campervans in 2011 – 21,347 New Zealand residents and 116,776 international visitors.

Table 3 Population of campervan hire days and occupants

Country group	Number of campervan units hired	Average campervan hire days	Total campervan hire days	Average adults per campervan	Total campervan occupants
TOTAL	63,930	15.5	991,180	2.2	138,124
New Zealand	10,220	8.9	90,820	2.1	21,347
All international	53,710	16.8	900,360	2.2	116,776
Australia	18,310	11.9	218,250	2.1	38,448
United Kingdom	9,090	18.3	166,200	2.0	18,515
Germany	6,660	22.3	148,780	2.1	13,875
Netherlands	2080	27.9	58,030	2.0	4,242
Other Europe	9,510	20.3	192,690	2.4	22,908
Americas	3,560	14.2	50,520	2.2	7,707
Other countries	4,500	14.6	65,890	2.5	11,082

2.1 Length of stay characteristics of campervan occupants

On average a domestic campervan hire lasted 7.9 nights and an international campervan hire lasted 15.8 nights¹. Before/after the campervan hire period domestic occupants spent a further 1.2 nights away from home while international occupants stayed a further 4.0 nights in New Zealand.

Domestic occupants therefore had an average trip length of 9.1 nights which equates to a total of 194,453 domestic visitor nights in 2011, and international occupants had an average length of stay in New Zealand of 19.7 nights which equates to a total of 2,302,959 international visitor nights.

¹ This assumes that the average number of nights covered by the campervan hire period was one less than the average number of hire days.

Table 4 Length of stay characteristics of campervan occupants in 2011

Country group	Average length of trip (nights)		
	Campervan hire*	Before/after campervan hire	Total trip
New Zealand	7.9	1.2	9.1
All international	15.8	4.0	19.7
Australia	10.9	2.8	13.7
United Kingdom	17.3	6.8	24.1
Germany	21.3	3.0	24.3
Netherlands	26.9	3.9	30.8
Other Europe	19.3	4.0	23.3
Americas	13.2	4.6	17.8
Other countries	13.6	4.0	17.6

*The average number of hire nights is assumed to be one less than the average number of hire days

Table 5 Visitor nights generated by campervan occupants in 2011

Country group	Total visitor nights		
	During campervan hire	Before/after campervan hire	Total trip
TOTAL	2,003,366	488,269	2,491,635
New Zealand	168,356	26,097	194,453
All international	1,840,787	462,172	2,302,959
Australia	419,840	107,336	527,176
United Kingdom	320,015	125,512	445,527
Germany	296,083	41,011	337,094
Netherlands	114,094	16,717	130,811
Other Europe	441,245	92,063	533,308
Americas	101,666	35,358	137,024
Other countries	151,178	44,176	195,354

2.2 Spend by campervan occupants excl. international airfares

Domestic campervan occupants spent a total of \$38.1 million outside their home regions in 2011 inclusive of GST, and international campervan occupants spent a total of \$447.9 million in New Zealand excluding expenditure on international airfares (see Table 6).

On average domestic campervan occupants spent a total of \$1,787 over their entire trip, a per night equivalent of \$196. International campervan occupants spent a total of \$3,836 per adult in New Zealand excluding international airfares, a per night equivalent of \$195 over the entire trip.

Table 6 Total spend in New Zealand by campervan occupants excluding international airfares

Country group	Total spend in New Zealand (\$NZm incl. GST)			Spend per adult	Spend per adult night
	During campervan hire	Before/after campervan hire	Total		
TOTAL	\$407.2	\$78.9	\$486.1	\$3,519	\$195
New Zealand	\$32.6	\$5.5	\$38.1	\$1,787	\$196
All international	\$374.6	\$73.3	\$447.9	\$3,836	\$195
Australia	\$93.5	\$19.5	\$113.0	\$2,939	\$214
United Kingdom	\$64.4	\$16.7	\$81.1	\$4,380	\$182
Germany	\$52.4	\$8.5	\$61.0	\$4,393	\$181
Netherlands	\$20.4	\$2.2	\$22.6	\$5,330	\$173
Other Europe	\$86.4	\$11.5	\$97.9	\$4,274	\$184
Americas	\$21.5	\$6.5	\$28.0	\$3,628	\$204
Other countries	\$38.5	\$8.4	\$46.9	\$4,230	\$240

2.2.1 Spend during the campervan hire period

On average, each domestic campervan occupant spent \$1,527 during the hire period and each international campervan occupant spent \$3,208. This equates to \$194 per night for domestic occupants and \$204 per night for international occupants, including campervan hire.

Table 7 Spend by campervan occupants during the campervan hire period in 2011

	Total spend in NZ (\$NZm, incl. GST)			Spend per adult	Spend per adult night
	Campervan hire*	Other ^	Total		
TOTAL	\$167.5	\$239.7	\$407.2	\$2,948	\$203
New Zealand	\$14.4	\$18.2	\$32.6	\$1,527	\$194
All international	\$153.1	\$221.5	\$374.6	\$3,208	\$204
Australia	\$35.7	\$57.8	\$93.5	\$2,432	\$223
United Kingdom	\$29.5	\$34.9	\$64.4	\$3,479	\$201
Germany	\$23.8	\$28.6	\$52.4	\$3,779	\$177
Netherlands	\$10.3	\$10.2	\$20.4	\$4,815	\$179
Other Europe	\$32.9	\$53.5	\$86.4	\$3,771	\$196
Americas	\$8.4	\$13.1	\$21.5	\$2,790	\$212
Other countries	\$12.5	\$26.0	\$38.5	\$3,470	\$254

*sourced from campervan operator financial data (excludes commissions paid to foreign businesses)

^See Appendices for more detail

2.2.2 Spend in New Zealand before/after the campervan hire period

On average, domestic campervan occupants spent a total of \$260 (including domestic airfares) before/after the campervan hire period during their trip away from their home region, a per night equivalent of \$213. International campervan occupants spent an average of \$628 in New Zealand before/after the campervan hire period, a per night equivalent of \$159.

Table 8 Spend by campervan occupants before/after the campervan hire period in 2011

	Total spend (\$NZm)^	Spend per adult	Spend per adult night
TOTAL	\$78.9	\$571	\$162
New Zealand	\$5.5	\$260	\$213
All international	\$73.3	\$628	\$159
Australia	\$19.5	\$508	\$182
United Kingdom	\$16.7	\$901	\$133
Germany	\$8.5	\$615	\$208
Netherlands	\$2.2	\$515	\$131
Other Europe	\$11.5	\$503	\$125
Americas	\$6.5	\$837	\$182
Other countries	\$8.4	\$759	\$191

^See Appendices for more detail

2.3 Spend by campervan occupants on Air NZ international airfares

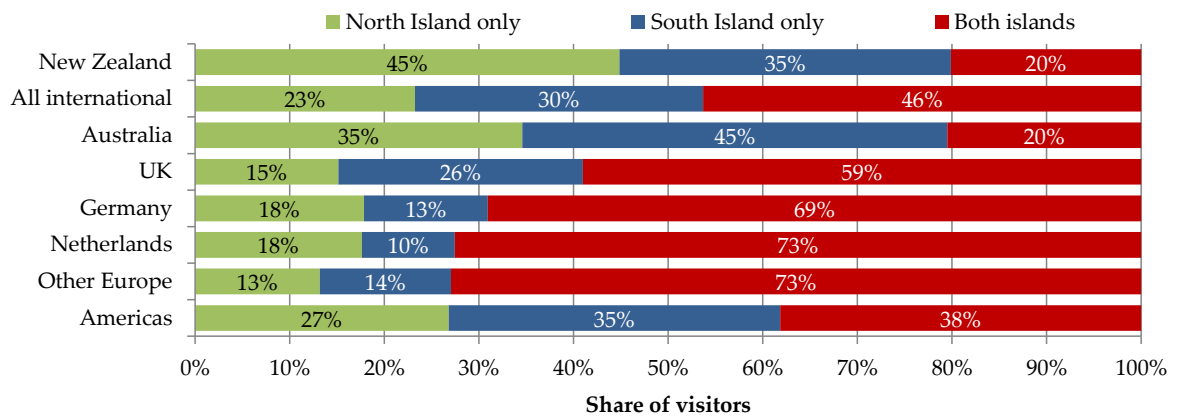
Around 42,300 campervan occupants from overseas (36%) used Air New Zealand as their international carrier. In total these visitors purchased approximately \$61 million of international airfares from Air New Zealand, with each spending an average of \$1,444. Australians travelling on Air New Zealand spent an average of \$614 on international airfares while long-haul travellers spent an average of \$1,861. Some long-haul travellers visited Australia or the Pacific Islands before or after New Zealand and therefore only flew with Air New Zealand in one direction.

2.4 Travel characteristics of campervan occupants

During the campervan hire period domestic campervan occupants spent 75% of their nights in paid sites while international occupants spent 89% of their nights in paid sites. "Unpaid sites" includes nights spent parked on the property of friends or relatives.

Weighted by country, 46% of international respondents visited both the North and South islands during their visit to New Zealand while 20% of domestic respondents visited both islands during their trip away from their home region (see Figure 1).

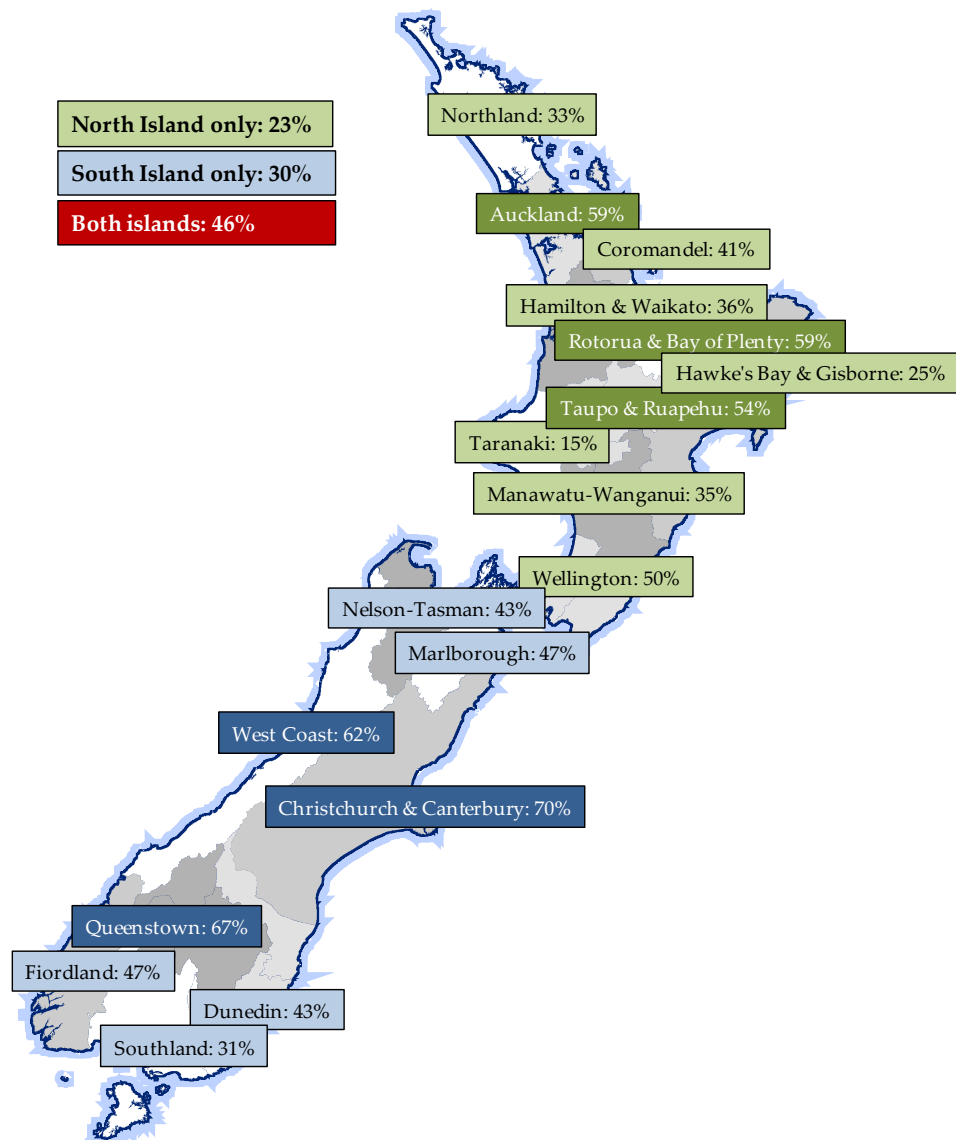
Figure 1: Geographic spread of campervan hirers



2.5 Regional dispersion of international campervan occupants

The region most visited by international campervan occupants is Canterbury, with 70% visiting this region. All New Zealand regions were visited by more than a quarter of international campervan occupants except Taranaki, which was visited by only 15% (see Figure 2).

Figure 2: Share of international campervan occupants visiting each region during their campervan trip



Appendices

Appendix 1 Spend per adult by campervan occupants during the campervan hire period in 2011 (inclusive of GST)

Country group	Van Hire*	Site fees	Accom	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total
New Zealand	\$675	\$125	\$14	\$35	\$178	\$145	\$134	\$135	\$81	\$5	\$1,527
All international	\$1,311	\$283	\$40	\$93	\$276	\$304	\$240	\$442	\$204	\$13	\$3,208
Australia	\$929	\$203	\$30	\$42	\$217	\$223	\$210	\$369	\$194	\$16	\$2,432
United Kingdom	\$1,594	\$302	\$40	\$116	\$271	\$281	\$256	\$451	\$159	\$7	\$3,479
Germany	\$1,718	\$343	\$38	\$120	\$363	\$406	\$216	\$370	\$172	\$32	\$3,779
Netherlands	\$2,418	\$453	\$33	\$146	\$356	\$438	\$239	\$513	\$209	\$9	\$4,815
Other Europe	\$1,436	\$341	\$48	\$148	\$321	\$386	\$305	\$542	\$243	\$2	\$3,771
Americas	\$1,095	\$231	\$62	\$88	\$253	\$247	\$212	\$399	\$201	\$2	\$2,790
Other countries	\$1,127	\$332	\$57	\$70	\$294	\$339	\$265	\$646	\$322	\$19	\$3,470

*sourced from campervan rental company financial data (excludes commissions paid to foreign businesses)

Appendix 2 Spend per adult by campervan occupants before/after the campervan hire period in 2011 (inclusive of GST)

Country group	Accom	Domestic Airfares	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total excl. airfares	Air NZ fares	Total incl. airfares
New Zealand	\$43	\$99	\$33	\$17	\$16	\$23	\$15	\$14	\$1	\$260	n/a	\$260
All international	\$206	\$79	\$92	\$22	\$34	\$83	\$60	\$47	\$5	\$628	\$523	\$1,151
Australia	\$165	\$44	\$66	\$16	\$30	\$73	\$68	\$43	\$2	\$508	\$223	\$731
United Kingdom	\$316	\$66	\$170	\$39	\$48	\$131	\$80	\$48	\$2	\$901	\$783	\$1,684
Germany	\$205	\$134	\$80	\$12	\$30	\$62	\$28	\$33	\$30	\$615	\$603	\$1,218
Netherlands	\$143	\$120	\$59	\$9	\$34	\$69	\$35	\$46	\$0	\$515	\$395	\$909
Other Europe	\$170	\$61	\$78	\$16	\$23	\$72	\$41	\$42	\$0	\$503	\$574	\$1,078
Americas	\$258	\$227	\$84	\$31	\$30	\$95	\$61	\$50	\$0	\$837	\$1,310	\$2,147
Other countries	\$230	\$75	\$111	\$35	\$53	\$87	\$82	\$85	\$2	\$759	\$428	\$1,187

Appendix 3 Spend per adult by campervan occupants throughout the trip in 2011 (inclusive of GST)

Country group	Van Hire*	Site fees	Accom	Domestic Airfares	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total excl. airfares	Air NZ fares	Total incl. airfares
New Zealand	\$675	\$125	\$56	\$99	\$68	\$195	\$161	\$157	\$150	\$95	\$6	\$1,787	n/a	\$1,787
All international	\$1,311	\$283	\$246	\$79	\$185	\$298	\$338	\$324	\$502	\$251	\$18	\$3,836	\$523	\$4,359
Australia	\$929	\$203	\$195	\$44	\$108	\$232	\$253	\$282	\$438	\$237	\$18	\$2,939	\$223	\$3,162
United Kingdom	\$1,594	\$302	\$356	\$66	\$286	\$310	\$330	\$387	\$532	\$207	\$9	\$4,380	\$783	\$5,163
Germany	\$1,718	\$343	\$243	\$134	\$200	\$375	\$436	\$279	\$398	\$205	\$62	\$4,393	\$603	\$4,996
Netherlands	\$2,418	\$453	\$176	\$120	\$206	\$365	\$472	\$308	\$548	\$255	\$9	\$5,330	\$395	\$5,725
Other Europe	\$1,436	\$341	\$218	\$61	\$225	\$336	\$409	\$377	\$583	\$285	\$2	\$4,274	\$574	\$4,849
Americas	\$1,095	\$231	\$319	\$227	\$173	\$285	\$277	\$307	\$460	\$251	\$2	\$3,628	\$1,310	\$4,938
Other countries	\$1,127	\$332	\$287	\$75	\$181	\$329	\$391	\$352	\$728	\$406	\$21	\$4,230	\$428	\$4,657

*sourced from campervan rental company financial data (excludes commissions paid to foreign businesses)

Appendix 4 Total spend by campervan occupants throughout the trip in 2011 (\$m inclusive of GST)

Country group	Van Hire*	Site fees	Accom	Domestic Airfares	Other Transport	Fuel	Groceries	Food & Bev	Attractions & Activities	Retail	Other	Total excl. airfares	Air NZ fares	Total incl. airfares
TOTAL	\$167.5	\$35.7	\$30.0	\$11.4	\$23.1	\$38.9	\$42.9	\$41.1	\$61.8	\$31.4	\$2.2	\$486.1	\$61.1	\$547.2
New Zealand	\$14.4	\$2.7	\$1.2	\$2.1	\$1.4	\$4.2	\$3.4	\$3.3	\$3.2	\$2.0	\$0.1	\$38.1	n/a	\$38.1
All international	\$153.1	\$33.1	\$28.8	\$9.3	\$21.6	\$34.8	\$39.5	\$37.8	\$58.6	\$29.3	\$2.1	\$447.9	\$61.1	\$509.0
Australia	\$35.7	\$7.8	\$7.5	\$1.7	\$4.1	\$8.9	\$9.7	\$10.8	\$16.8	\$9.1	\$0.7	\$113.0	\$8.6	\$121.6
United Kingdom	\$29.5	\$5.6	\$6.6	\$1.2	\$5.3	\$5.7	\$6.1	\$7.2	\$9.8	\$3.8	\$0.2	\$81.1	\$14.5	\$95.6
Germany	\$23.8	\$4.8	\$3.4	\$1.9	\$2.8	\$5.2	\$6.1	\$3.9	\$5.5	\$2.8	\$0.9	\$61.0	\$8.4	\$69.3
Netherlands	\$10.3	\$1.9	\$0.7	\$0.5	\$0.9	\$1.5	\$2.0	\$1.3	\$2.3	\$1.1	\$0.0	\$22.6	\$1.7	\$24.3
Other Europe	\$32.9	\$7.8	\$5.0	\$1.4	\$5.2	\$7.7	\$9.4	\$8.6	\$13.4	\$6.5	\$0.0	\$97.9	\$13.2	\$111.1
Americas	\$8.4	\$1.8	\$2.5	\$1.8	\$1.3	\$2.2	\$2.1	\$2.4	\$3.5	\$1.9	\$0.0	\$28.0	\$10.1	\$38.1
Other countries	\$12.5	\$3.7	\$3.2	\$0.8	\$2.0	\$3.7	\$4.3	\$3.9	\$8.1	\$4.5	\$0.2	\$46.9	\$4.7	\$51.6

*sourced from campervan rental company financial data (excludes commissions paid to foreign businesses)