

Report for:
Tourism Bay of Plenty
Tauranga

Visiting Friends and Relatives (VFR) in the Bay of Plenty

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Executive Summary

Tourism Bay of Plenty is interested to know whether local hosts of visiting friends and relatives (VFR) might be encouraged to play a larger part in the tourism economy of the Bay.

This survey of 699 individuals gives a 4-week snapshot of VFR activity in the Bay of Plenty in summer 2016 including Auckland Anniversary and Waitangi Days; and a week at Easter during the Tauranga Jazz Festival.

Issues investigated are: VFR profile, social dynamics which affect participation; activity patterns; the image of the Bay of Plenty; destination management issues that affect image; and the impact that VFR have on the visitor economy.

Issue	Top line results
VFR profile	<ul style="list-style-type: none"> • The proportion of VFR hosts to guests surveyed is 2.5 to 1. • 70% of all the people surveyed are either VFR hosts or guests. • Females are more likely to be hosts as well as guests. • New Zealanders are more likely to be hosts than visitors. • Australians are more likely to not be VFR. • UK visitors are VFR visitors. • VFR hosts are more likely to be over 66 years, with average income. • VFR visitors are usually much younger and wealthier than their hosts • Cars are the most common mode of transport for hosts. • VFR visitors travel by campervans and car.
Impact on the visitor economy	<p>VFR visit characteristics:</p> <ul style="list-style-type: none"> • The average number of VFR guests is 2 per visit. • VFR are repeat visitors. • Most VFR are domestic travellers from Auckland and the Waikato • 24% are international visitors from Australia and the UK. • VFR visits mostly occur on weekends. • Most stay in private homes but a significant proportion (23%) stay in pay for accommodation – the shared economy, backpackers, hotels. <p>Economic impact:</p> <ul style="list-style-type: none"> • Free and home based activities are preferred by all but many VFR activities attract an indirect cost (fuel) or are direct tourism payments. • \$1221 of new money is spent per visit, mostly in groups of 2, so the minimum of funds added is \$610 per person. • 40% is direct spend in the visitor economy outside the home – on attractions, accommodation, meals out. • Indirect expenditures are food & beverage, retail shopping, fuel, gifts. • A small amount is spent on transport. • 45-65 year olds are consistent but 19-25's are peak spenders. • Visits to friends injects the largest amount of money. • Free and home based activities are preferred by all VFR.

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<p>Social dynamics</p>	<ul style="list-style-type: none"> • Fun and relaxation top the list of reasons to visit. • Companionship, shared food, time out and family visits to local places are a group of preferred activities. • Hosts want to see VFR family, but guests combine visits and activities. • Hosts influence decisions, but consult their guests but not their family. • Female guests and people over 25 are more persuadable by their hosts than males or younger people. • Local places interest NZ domestic and international VFR visitors. • Females hosts and guests rate visits to local places highly. • But, overall hosts are not interested in taking visitors to local places. • Easter visits are for family; summer visits are to combine VFR with other activities.
<p>Patterns of participation</p>	<ul style="list-style-type: none"> • Passive leisure (at home, beach, picnic), active leisure (walking) and passive recreation (drive sightseeing, cafes) in the company of others are important activities for all VFR hosts and guests. • Over 25 year olds prefer active leisure, drive sightseeing and events. • Under 25-year-old VFR seek active recreation. • International and domestic VFR prefer and dislike the same activities. • Average income earners prefer active recreation, compared to higher and lower earners. • Passive leisure and recreation are enjoyed by below average income. • Engagement in both organised and informal sports is low. • Males prefer active recreation and bars. • Females prefer festivals and events and shopping.
<p>Image of the Bay</p>	<p>Range of activities:</p> <ul style="list-style-type: none"> • The Bay is perceived as a relaxing, rejuvenating leisure destination. • All VFR enjoy passive and active leisure. • Older people socialise at home, young VFR like active recreation, bars <p>‘Special places’ to epitomise the Bay:</p> <ul style="list-style-type: none"> • Mount Maunganui is seen as a 2 km² destination ‘hotspot’ that offers passive and active leisure as well as recreation. • Urban Tauranga and harbour shores are known for eating out, vintage clothes, shopping and arts/crafts markets. • Tauranga harbour and estuary, set against the backdrop of the mountains offers a landscape unique in New Zealand. • The high backcountry of the Kaimai’s is known for its hot pools, waterfalls, swimming holes and bush walks. • Te Puke and the Eastern Bays are places for active recreation, kiwifruit and marae experiences. • Papamoa has surfing and extensive beaches. • Western Bays have an image of outdoor active leisure and recreation.

Destination management	<p>Information sources:</p> <ul style="list-style-type: none"> • Web sources are used most frequently to find activity information. • Word of mouth referrals (family, friends, local people) are key sources • Repeat visits is a key source of knowledge about the Bay of Plenty. • Paper based media, news media, phone apps and tourism services are used the least. <p>Services and infrastructure:</p> <ul style="list-style-type: none"> • The beaches, parks and walking tracks are greatly appreciated. • The image of the Bay is marred by traffic congestion and at peak times, inadequate sanitation and waste management. • Improved services and toilets are needed, also available parking, buses, rubbish bins, collection and recycling and better sanitation.
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Recommendations:

To address these issues, Tourism Bay of Plenty BOP could:

1. Develop marketing campaigns that:
 - a. Specifically target potential visitors in the Waikato and Auckland
 - b. Target the UK diaspora living in the Bay
 - c. Position the Bay as a healthy, energetic and intrinsically rewarding destination; an urbane and family friendly place, where one can access experiences 'from the mountains to the sea' within 20 minutes'.
2. Develop engaging web pages:
 - a. to serve locals, domestic and international visitors.
 - b. Incentivise repeat visitors with a downloadable information/wayfinding App
3. Develop a 'know your own backyard' programme so that locals can give directions, especially to international visitors, and go there themselves.
4. Develop events that encourage social cohesion – targeting older participants, women, lower income VFR hosts. 'Easter is for family; Summer is for fun'
5. Encourage artists, craftspeople, food producers to develop locally produced gifts, merchandise and foods that epitomise the experience of the Bay
6. Encourage the tourism industry to work differently:
 - a. Provide new products and services linked to VFR preferences, e.g. pop-up businesses at walking trails, waterfalls; supplements VFR visits – tents, etc.
 - b. Develop equitable activities and services to 'clip the ticket' at the value-for-money end, for equitable access.
 - c. Incentivise VFR dining out, active leisure and passive recreation.
7. TBOP can encourage TCC and central government to:
 - a. Support increased usage at key 'special places' with parking, waste, toilets.
 - b. Invest in infrastructure and review operational efficiencies.
 - c. Develop events at locations other than the Mount to spread visitation loads.
 - d. Develop faster, accessible bus routes from lower income suburbs and timetabling to shift vehicle use from cars.

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Dr Jenny Cave^a designed the research, planned its progress throughout and lead the research team, prepared the data collection instruments, analysed the data and wrote the reports.

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Visiting Friends and Relatives (VFR) in the Bay of Plenty

Introduction

The purpose of this project is to build a robust understanding of the Visiting Friends and Family (VFR) market in the Bay of Plenty, from the perspectives of both hosts and guests, with a particular focus on the domestic traveller. International and domestic visitors spend the equivalent of 11% of the region's gross domestic product in the Western Bay of Plenty and Tauranga (Statistics New Zealand, 2015b). Domestic travellers from the Waikato and Auckland make up 86% of visitors to the Bay (Statistics New Zealand, 2015a).

Tourism Bay of Plenty is interested to know whether local hosts of visiting friends and relatives might be encouraged to play a larger part in influencing the tourism economy of the Bay by encouraging their guests to take part more widely in pay-for activities. International visitors are not a central focus of the research, but are included in the wider data capture and analysis.

Strategies for destination marketing and management for this target market can be based upon issues such as: social dynamics, impact of this segment on the visitor economy, patterns of participation in activities, image of the Bay of Plenty and destination management.

Social dynamics includes questions of decision-making processes within the host-guest relationship, whether activities range from passive to active leisure, the benefits of being a host and a guest and the perceived 'special' experiences that you can only have in the Bay of Plenty, as well where information comes from and the role local people play in giving directions.

Impact of the VFR segment on the visitor economy can be seen through accommodation used, average visit (people per visit), length of visit, where from, direct and indirect expenditure as well as whether activities they engage in are pay for, free or attract an indirect cost.

Image of the Bay of Plenty is reflected in the patterns of participation, opinions about local services and the 'special places'.

Destination management issues include information sources used in order to engage in activities, use and perception of local services.

This is the second report. The first report, Visiting Friends and Relatives in the Bay of Plenty: Preliminary Easter Survey Data Profile (March 25 to 28, 2016) added local Tauranga residents to the survey base and surveyed in Te Puke to meet TBOP's responsibility for that location. It also added a question on 'special local places'.

This second report adds value by providing an in-depth understanding the drivers of VFR behaviour. It is made up of a "top line" executive summary of the key issues and detailed analysis. This report goes beyond its original intention to provide a top line description of VFR activity to explore the dynamics of factors such as age, gender, etc. that affect VFR behaviour, motivations and experiences.

Collectively these reports may help TBOP design marketing campaigns and tailor their services for VFR. They also identify opportunities for the tourism industry to create short-term pop-up enterprises that follow VFR preferences and may assist Tauranga City Council to design public services and consider infrastructure investment.

Issues and questions

This section outlines the issues related to the VFR market. Topics are bracketed at the end of each issue to indicate specific questions asked in the study, for example, [VFR profile].

Profile of Visiting Friends and Relatives

First we need to know who the visitors are, where they are from, how long they stay, where they stay, etc. and the proportion of VFR within the visitor cohort.

In 2014 Bay of Plenty businesses reported that 70% of their customers are visiting friends and relatives, popularly called the 'VFR' market (TIANZ, 2015) with numbers that peak around seasonal holidays but did not mention where they came from. Were they domestic visitors from elsewhere in New Zealand or international diaspora visiting the 17 % of BOP residents who were born overseas (Statistics New Zealand, 2014)?

Thirty-one percent of international arrivals (returning residents and international visitors) to New Zealand are VFR, mostly diasporan British and Australians. Given that 17.5% of residents were born overseas, mostly in England (Statistics New Zealand, 2014), are there international VFR in the Bay?

And from the host's side, who are they? Are they locals', resident in the Bay or second home owners? Where do VFR fit in the overall visitor profile? There are gaps in information that this research intends to address.

Social dynamics

The key motivations for visits to friends and relatives within a country and diaspora visiting from overseas are: to maintain family and cohort networks, preserve culture/language/customs, have holiday experiences and save money in a global downturn for travellers with less disposable income (especially older and younger travellers). Are VFRs primarily motivated by value for money or social experiences? Is there a difference in reasons for visit for people who visit family compared to people who visit friends? [Why do they visit?]

VFRs may extend their activities to include a wider range of activities than other tourists because of the local knowledge of their hosts, but do the opinions of their hosts influence their activities? [Who influences the decisions?]

Impact on the visitor economy

Anecdotally little is known about the economic impact of VFR. Data that informs this issue are: visit characteristics such as average stay, numbers of visits, number of visitors per visit, where they came from; places they stayed; reason for visit and amounts spent per visit (on average). Information from the activities in which the hosts and guests engage can also suggest areas where VFR contribute to the local economy but may not be officially recorded. Perhaps the use of pay-for experiences and facilities be encouraged by this market which anecdotally, uses free, rather than pay-for activities?

Waikato travellers to the Bay of Plenty are mostly day-trippers (31%, 2015) but if they stay overnight, do not use commercial accommodation. In 2015, 3.5M guests stayed in commercial accommodation in the Bay (Statistics New Zealand, 2015a). These figures do not include hosted options or the many domestic and international visiting friends and relatives (VFR) who stay in private homes (TIANZ, 2015). Where do VFR stay? In commercial accommodation, private hotels, guesthouses, bed and breakfasts, camp grounds and farm stays or at the homes of family and friends?

Yet the Waikato group spends twice as much as Aucklanders on passenger transport, pay-for tourism products and shopping. In contrast, Auckland residents spend more on accommodation but little on pay-for tourism activities. Both spend similar amounts on food, alcohol and fuel (MBIE, 2015). Are Aucklanders and Waikato visitors domestic VFR?

VFR are expected to use activities accessible without charge such as natural assets and public facilities, but do they also contribute to the tourism industry by visiting or using pay-for facilities? Do VFR seek value for money? [What is the economic impact of VFR?]

Patterns of participation

Anecdotally, VFR prefer to play in the Bay for free, exploring the region's natural resources, fishing, going to the beach and shopping but research suggests that whilst VFR spend less on accommodation, they spend more on gifts and dining out than other tourists. Where do they go? What do they do? Are VFR passive or active consumers or producers of leisure and recreation?

Table 1 A typology of passive versus active leisure and recreation

Activities	Passive	Active
Leisure	Passive leisure - time spent at home in activities that require little effort	Active leisure – social contact, cognitive or physical activity that expends little energy
Recreation (Free to Pay for)	Passive recreation - consumption of experience, in a landscape (man-made or natural), without physical challenge.	Active recreation - production of experience in a landscape that has intrinsic rewards (self). Involves a degree of challenge.
Sport	Informal, non-competitive sport	Structured and competitive sports extrinsic reward (visible to others).
The arts	Consumption of arts, culture & heritage	Production of arts, culture & heritage.

Examples of passive leisure are spending time at home talking, using social media. Active leisure actions are swimming, walking, cycling. Passive recreation examples are lying on the beach, having picnics, or going to festivals and events. Active recreation involves challenge such as fishing, hunting and tramping. Sport is both informal (touch rugby, pickup cricket) and formal organised sports that has extrinsic rewards visible to others. Arts, culture and heritage activities are consumed when visit attractions and craft markets, socially produced by engagement in Maori culture, and individually created in art and theatrical productions. [Which activities do VFR prefer?]

Image of the Bay of Plenty

Which image(s) of the Bay is reflected in the patterns of participation? Are there special places that only locals go to which might tell us about how they feel about their home base and what they want to show off to others? What is it like to be a guest in the Bay? And as a host, how do you feel?

What are the special places that locals know? Where do hosts take their visitors when in the Bay of Plenty? Place-meaning and place attachment is important to the image and brand of a destination. And, are central to the notion of whether hosts might be effective referrers for their visitors. This issue crosses over with knowledge of activities and destination management. Anecdotally, several people interviewed said after the interview that “they had no idea that there were so many activities available in the Bay, and that the survey had opened their eyes”. [What is the image of the Bay?]

Destination management

Prior research suggests that while travel decisions are made and booked in advance, typically decisions about what to do at the destination are postponed until arrival. Word-of-Mouth, including the social media virtual version of speaking, is a powerful referral tool that has a great deal of impact on the communication of destination image and the ability to manage a destination. Web pages, brochures collected at i-sites also have an impact.

Travellers have limited time, limited money and the distance they can travel is constrained by both. It is important then to consider how they find out which activities are available, where they are located and associated costs. Wayfinding mechanisms are linked to effective and efficient use of time and money.

Where do VFR get their information on activities, services and facilities? If we assume that the opinion of a ‘local’ person carries more weight than an indirect referral from, say, tourist information sources, and local residents become ‘informed referrers’, then perhaps the activities can be used more effectively, have greater rates of participation and contribute positively to the image of the destination. They can also communicate the distinctiveness character of the region and embody its perceived values – such as welcome, healthy outdoor living, etc. [Which information sources do VFR use?]

Efficient access to available activities also enhances destination image and the brand. The research also asked about how people find their way around the area as a means to know which mechanisms are most effective, which are least and what can be improved.

VFR use the same infrastructure, facilities and services such as transport systems and information services provided for residents and tourists. Are VFR satisfied with facilities and services in the Bay? What are their opinions of their shortcomings and strengths? Access and usage facilitate or inhibit enjoyment of a destination. These three elements of access to information, wayfinding and local infrastructure interact to influence patterns of participation, return visitation and frequency of visit. [Which infrastructure and services do VFR use?]

In summary, Tourism Bay of Plenty wants to understand the profile of this segment of tourism activity so that they can better tailor their marketing campaigns, understand the image of the area and increase participation in the tourism industry. Thus, can VFR hosts and guests play a larger part in the tourism economy of the Bay?

A central issue for this study also is, that if VFR from other regions of New Zealand and overseas are present in large numbers in the Bay but operate outside the formal tourism economy, the tourism industry cannot take advantage of their presence. Say, to use excess accommodation capacity during the winter months (TIANZ, 2015). Nor can the local governments which provide many of the quality of life experiences in the area, know to what extent their services add to the attractiveness of the destination, or perhaps contribute to dissatisfaction and reduce return visits.

Method

The research took place in two periods in the summer of 2015/16 funded by University of Waikato and Wairiki Institute of Technology. Fieldwork was coordinated by Bay of Plenty Polytechnic. Tourism Bay of Plenty have supported the analysis and Easter data collection.

Data collection

A pilot study was conducted at the end of December 2015, followed by 2 weeks of surveying in late January early February to capture school holiday family, visitors without children as well as two statutory holiday long weekends, Auckland Anniversary Day and Waitangi Day. The survey locations were Mount Maunganui and Papamoa which have slightly different tourism experiences, destination characteristics and base populations.

The Easter survey focused on people in the downtown area and on the waterfront in Tauranga. The Baycourt theatre complex was included to reach families from around NZ for Friday through Sunday during the Youth Jazz Competition. The Historic Village was the focus of interviews for the team on Monday. Two 2 days, Saturday and Sunday were spent in Te Puke.

Both surveys took place between 10am – 6pm to target foot traffic and the summer surveys included evening events and the Night Market.

Interviews occurred in places where locals and families gather for events and recreational activities – the beach, cafes and markets, open space such as playgrounds. Data was collected by face-to-face interview, using a pen/paper based printed questionnaire with open-ended and closed-ended questions. The questionnaire content came from the literature about visiting friends and relatives as well as prior research done by the Principal Investigator in the region.

Screening questions were used to identify hosts, second home owners, visitors and people who were neither hosts nor guests. These initial questions obtained a small amount of base profile data to provide representativeness for the sample.

The closed-ended questions offered categories from which respondents could choose to describe themselves or their actions, or scales on which opinions or the likelihood of action could be represented. The open end questions which ask people to write their opinions or impressions in their own words.

Sample

Sampling of respondents was done on a fixed interval basis to choose respondents at random but ultimately was convenience-based on the location where people congregated. Locations were chosen for their high foot traffic, since records are not available to estimate the actual host/visitor population.

A team of 5 researchers collected the 3 weeks of summer data, and another group of 5 surveyors collected the Easter survey. Surveys took place over 14 hours per day, 7 days per week, in two hour blocks from 6.00 am to 8.00 to make sure that all hours, of each day were sampled.

Overall, the total number of surveys stands at 668 in total, 500 from the summer data collection and 168 from Easter.

The Easter survey response was lower than we had hoped for and the team reported high refusal rates. Reasons given were that people want to attend timetabled events at the Jazz festival and not be distracted by a survey.

Analysis

The numerical data for this top line report was analysed using descriptive statistics and techniques that permit top level identification of differences in the information between groups such as visitors and hosts. This report includes some information intended for a later report by looking for factors which might influence patterns in the information such as age, gender, income, etc.

Economic impact was assessed using an estimate of the incremental expenditure in the Bay of Plenty as a result of VFR activity.

Open end questions were analysed by identifying themes using thematic analysis and a software called Nvivo which generates 'word clouds' of related ideas (Lock & Seele, 2015)

and are also useful to look into the views of two sets of respondents (in this case Hosts and Guests) on the same issue (Cidell, 2010; McNaught & Lam, 2010).

A future report will deepen the understanding of underlying relationships that sit within the results.

Limitations

The primary limitation was the slow response at Easter which reduced the expected numbers. The interviewers were under 30 years of age and may have unconsciously gathered more data for this group than one might expect.

There is very little reliable information about the proportions of VFR in the market as a whole, nor accurate records of the actual visitors present in the region at any one time. As a result, the surveyors also gathered baseline data from people who were neither visitors nor hosts.

This sample is representative of those in Tauranga at the time, but may not be able to be projected to the wider population as a whole.

Findings

Basic understandings about the project are very important to understand the basic statistics about the variables we used pie-charts, cross-tabulation, and spear man chi-square test. Tables are provided in the Appendix for these figures.

VFR profile – who are VFR hosts and guests?

Overall, 485 visitors and hosts (351 hosts and 134 visitors) and 203 people who are neither visitors nor hosts were interviewed. The survey gives a 4-week snapshot, of VFR activity in the Bay of Plenty, 3 weeks in January/February 2016 including Auckland Anniversary and Waitangi Days; and a week at Easter during the Tauranga Jazz Festival.

Fifty-one percent are VFR hosts, 19.5% are VFR visitors and 29.5% are neither hosts nor visitors but are part of the wider population where the survey was carried out. We also identified second home owners in the sample (35 people) but added them to the host group since their profiles are similar. Seventy percent of all the people surveyed are either VFR hosts or guests.

From 688 respondents, 60 % are female and 40% male. Trends in the data indicate that females are more likely to be hosts than males; and also more likely to be visitors. There are however twice as many females in the data than males, so there might be a bias in this direction but the strength of the statistical tests means that we can have strong confidence that females are more likely to be VFR.

Most of the people surveyed are from New Zealand (602 people, 88%) and the balance from overseas. Of that smaller group of 86, 4.2% are from Australia and just over 2% from the UK and Europe, with almost 2% from Asia/Africa and the Americas.

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The New Zealanders are mostly residents of Tauranga (32%, 224 people), but 7.6% live in Papamoa, 6.8% in Mt Maunganui and 5.7% from Te Puke (39 people). This result meets the intention to survey mainly Tauranga residents but to include Te Puke and Papamoa. Five percent live in the Western Bay of Plenty/Coromandel area. Also, as expected, the Bay of Plenty is a popular destination for people who live outside the immediate region. Of these, the largest numbers (87 people, 13 %) have homes in the Waikato region and Aucklanders at 11%. Others, such as other North Island, South Islanders are represented in quite small numbers.

The largest age group of the people interviewed overall was 46-65 years (30.5%). Next was 19 to 25 year olds at 24.4% followed by those over 66 years (15.7%). The middle years of 36 to 45 years represented 13.7% of the group and under 18 years, 5.5%. The group then has two peaks, towards the upper years with around 45% over 46 and the younger age groups under 25 years. The age profile is consistent with the Tauranga region, and the location of the surveys.

Age makes no difference to whether you are a host, a visitor or neither. Most of the respondents from all age groups are hosts.

The largest, hosts are 66 years and above (53.7%) whereas the highest visitors' age group is 26-35 years (24%). The most frequently occurring age groups for neither host nor guests are under 18 years (34%) and the 36-45 year olds (33%).

Ethnically, the majority of people surveyed self-identified as European (87%), 5% as Maori (33 people), 2.7% Pacific and 2.2% are Middle East/Americas/African. Of Maori, 14 identified their Iwi affiliation from 10 different Iwi, including Ngati Ranginui (Tauranga Moana, 2 people), 3 of Ngati Porou (Gisborne) and 2 from Ngati Kuhungunu (Hawkes Bay) as well as 7 others with ancestry from the Waikato, Northland, Rotorua and South Island Iwi.

A breakdown by country of residence shows that New Zealand residents are more likely to be hosts than visitors (58% are hosts, 17% are visitors and 25% not hosts or visitors). Australians however are more likely not to be VFR since 65% of that group reported they are neither host nor VFR visitor, perhaps reflecting the ease of access, proximity and popularity of New Zealand as a travel destination. But 28% are visiting friends and relatives in the Bay of Plenty and 7% are hosts to other visitors.

The UK group are most likely to be making visits to family and friends in the Bay of Plenty (75%) with small numbers visiting for other purposes, but none are hosts themselves. Europeans, African/Asian and respondents from the Americas are primarily visiting for other purposes but small numbers African/Asian and Europeans are visiting family and friends, 26% and 31% respectively.

In terms of income, the respondents 52% are above and far above the average wage of New Zealanders (\$32,292 per annum), 29% at the average income level and 18.6 % below, perhaps reflecting retirees. Most of the hosts are from the average income levels (60%) rather than the above average income and richest groups. This is interesting given that that majority of respondents are from the above average income groups. All income groups indicated that they are all mostly the hosts rather than visitors but not at a statistically significant level.

Around two thirds quarters of the people surveyed did not have dependent children living at home but one third did.

Of the Easter group, 50% had travelled to the Bay of Plenty specifically for the Jazz Festival.

How did people travel to the Bay on the day that they were surveyed?

The results showed a highly significant result that 99% of the time, hosts used their own cars for travel (63%; 247 people), whereas visitors, in the main, used rentals or campervans (48.5%; 16 people). Fifty-four people used a local bus, bicycle or walked on the day of interview and are evenly split between hosts and neither host or visitor. Roughly equal numbers of hosts, visitors and neither host nor guest visitors travelled in the car of a friend (169 people).

In summary, VFR profile

The profile shows that Tauranga, Mt Maunganui, Papamoa and Te Puke are mainly local hosts but also had a small number of second home hosts. The visitors are mostly from Waikato and Auckland regions. Only 12% are international visitors, mainly from Australia and some from the UK. The proportions are similar for the visitors who are neither VFR hosts or visitors. Ethnically, the group mostly self-identified as European. If we assume that this sample is representative of the population of the Bay of Plenty as a whole, then VFR activity (as hosts and guest) amounts to 70% of the tourism in the area and hosting activity is substantial.

Impact of VFR on the visitor economy

We know now who they are, but what are characterises of the VFR visit? Visitors have direct and indirect consequences on the economy (Tourism Intelligence Unit, 2016) and so it is important to assess the characteristics and impact of host and guest activities in the overall demand and supply of goods and services in a destination.

VFR visit characteristics

On average, the number of guests per visit is 2 people (40%). Twelve percent are one person visits, 21% are 3 people and 11% numbers 4 people. However, the average number ranges to 16, with 38 families reporting a party of over 5 visitors.

The number of visits made in the four months prior to the survey by either friends or family also varies from 1 to 4. Forty percent make one visit in that time, 24% made 2 visits, 17% make three and only 10 % achieve four; thus VFR are repeat visitors.

Reporting on the first of three visits in the prior 4 months, 30% of VFR came from within 100 km distance, less than one hours' travel, mainly from the Western Bay of Plenty. Thirty-eight percent of VFR visitors travel one to two hours to reach the Bay from the Waikato and Auckland and 9% from elsewhere in New Zealand. Twenty-four percent are international

visitors who come primarily from Australia and the UK (9% for each), 3% from Europe, 2% from Africa/Asia and 1% from the Americas.

Twelve percent are day trips, 28% stayed for the weekend, 25% for up to four days and 14% remained in the Bay for a week. Eight percent of VFR made 2 weeks and a month-long visit. Only 3 % stayed longer than a month.

Seventeen percent are day trips, without an overnight stay. Thirty-nine percent stayed for the weekend (1 or 2 nights), 12% extended the weekend to stay an extra night and 12 spent up to a week (6 nights). VFR then tend to be weekend stays.

For the first visit, most VFR hosts and visitors said that visitors (77%) stayed in private homes, but also holiday homes (11%), hotels and motels (4%), VFM accommodation such as backpackers (3%), and sharing economy homes (3%) as well as private and pay for combinations. However, when the total visits are combined for average expenditure below, the pattern is for broader, suggesting dual use of private and pay-for accommodation.

The reason for the visit is 50% say they are there to visit family, and 27% to visit friends. Visits which combine visits to both family and friends are 1%. Other reasons that combine a VFR visit with other activities include holiday (5%), business and conference at 3% and others such as events, sports.

Summary of visit characteristics:

VFR are most likely to be parties of 2 people. VFR tend to be repeat visitors, although 40% make only one visit in the four months of summer. Nearly 40% percentage of VFR travel from as far away as Auckland, and 30% come from within an hour's drive, making the BOP a domestic tourist destination, although 24% are international visitors from Australia and the UK. VFR visits mostly occur on weekends (one or two nights) but 25% extend to their stay to 4 days. The majority stay in private homes of family or friends but a significant proportion (23%) stay in pay for accommodation. Their reason for visit separates into half stay with family, almost a third visit with friends, but 23% stay with friends and family whilst doing other things, such as holiday, conference, business, events, etc.

Spending patterns

Most of the respondents spent money on food and beverage (28%) and meals outside the home, at restaurants or cafes, over and above their regular weekly expenditure.

VFR hosts and guests spent 13% on accommodation and 12% on each fuel and retail shopping. Eight percent is spent on visits to attractions and tourist activities. Smaller proportions are spent on transport and gifts for family. Table 2 shows the averages for each item.

For each visit, \$531 dollars are spent in the Bay of Plenty by either the hosts or their guests. Household food and beverage adds \$151 per visit, for an average of 2 people per visit. The amount spent on meals eaten outside the home is \$95, suggesting that meals out could have been in restaurants.

Similarly, \$66 per night is spent, on average, on accommodation outside the home. Seventy-eight percent of guests and 94% of hosts spent no money on accommodation, 6% of hosts and 22% of guests paid for accommodation. This confirms that money is spent in the accommodation industry as a result of VFR activity.

Table 2 Average VFR spend per visit

	Percentage	Average per visit
Food and beverage	28%	\$151
Meal out/restaurants	17%	\$95
Accommodation	15%	\$66
Fuel	12%	\$67
Retail shopping	12%	\$64
Entertainment (attractions/activities)	8%	\$47
Transport	4%	\$20
Gifts for family	4%	\$20
Total	100%	\$531

The range of spend concentrates in the lower end of accommodation costs, under \$200 and under \$500, but a second peak appears however over \$1200. The latter amount may attach to holiday home rental.

\$67 per visit is spent on fuel on average per visit, suggesting a half tank of petrol is bought for each visit. Sixty-four dollars is on retail shopping, plus \$20 on gifts for the family whether they are hosts or guests. The amount spent on attractions and activities is not large (\$47), but may be for admission fees. A small amount, \$20 per visit is spent on transport, suggesting that perhaps local buses are used but also might include taxi fares.

Incremental expenditure

What is the incremental expenditure in the Bay of Plenty as a result of VFR activity?

This question is important to TBOP's consideration of which activities and market segments to target. TBOP should encourage those activities which contribute the most income to the visitor economy, while at the same time ensuring that the smaller spends at lower levels provide the base load which might not bring large amounts of income, yet continue the demand for popular activities.

A broad brush approach to understanding the economic impact as a result of visits by friends and relatives in the Bay of Plenty area is to apply a general equilibrium multiplier to the overall average spend. Then, to break down the overall spend to explore which age groups, type of accommodation and reason for visit contributes the most.

When visitors to a region spend money in that place, this is new money - say \$100 per visitor - added to the economy of a region, over and above the amounts spent in the area by

locals. However, if locals spent \$100, then it may be that only \$50 of this is extra, for the visitors.

In this study, local hosts are asked to identify how much on average, is usually spent by that family to host family and friends, for each visit. So, the figures are incremental spends, over and above the normal weekly amounts.

The total amount spent, on all items is \$531. Using a general equilibrium multiplier of 2.3 (noted in the methods section) that means, for every VFR visit, an incremental amount of \$1221 is spent in the region by the host or the visitor. The average number of visitors is 2, so, per person, the amount of new money in the Bay of Plenty as a result of VFR activity is at a minimum, \$610.

It is important to understand which activity and demographic group contributes the most to the economy in order to assess where to focus marketing campaigns and product development and where to invest funds. Therefore, we need to look at who spends the most, and in which sectors of the industry. The amount of disposable money is likely to vary the most by age. Younger age groups will have less disposable income. Wage earners will have more, increasing to retirement age and then the amounts decrease again.

Which age groups spend the most?

Nineteen to 25 year olds have the highest amount of spend per visit of all the groups from \$150 to \$350, peaking at around \$200. Forty-five to 65's consistently spends across the board, starting at dollar amounts at \$200 increments from \$200 to \$610, and then less frequently at \$1400 and \$1650. The older group then is the stable spender. But the younger group seems to spend more frequently, at lower levels. Under 18s, do not spend a great deal. Twenty-six to 35's appears to spend less than 36 to 45 year olds who contribute at low levels at many spend points, as do over 66 year olds, but at low levels

The 'bread and butter' contributors to the Bay economy, seem to be 45 to 65 year olds, and 19 to 25's are peak spenders.

Which type of accommodation contributes the most?

The sharing economy appears to contribute well to the economy of the Bay, with figure peaking at \$240, \$350 and \$450 per visit. Amounts around \$90 and \$150 per visit show for private accommodation, perhaps that visitors stayed in private homes of other people, perhaps in bed and breakfasts, supported in some way by their host. Hotels and motels are used, but at quite low levels to peak around \$300. In contrast, value for money accommodation such as backpackers and holiday parks are used consistently, at many price points across all cost levels. Holiday homes are used, but the costs appear at 2 price points, \$400 and \$1200.

VFR activity then appears to locate mainly in private homes, the sharing economy and value for money accommodation. The direct financial contributors to the region are first, the sharing economy and second, backpackers and holiday parks.

Which reason for visit contributes the most?

Visits to friends appears to attract a high spend per visit, from \$90 to \$400, peaking at \$350. Lesser amounts are spent for visits with family members, mainly between \$90 to \$290 with a peak at around \$100. Conference and business are low levels at higher amounts, as is spend whilst attending events but at lower amounts. Visits with friends contribute the most to the economy, followed next by visits to family.

In summary, impact of VFR on the visitor economy:

Regarding the impacts of VFR on the visitor economy, first, visit characteristics. Typically, 2 to 4 people travel to the Bay of Plenty to visit family and friends each time, suggesting couples or family groups. A single trip is most common from mainly the Waikato and Auckland as well as close by within the Bay, but many make two or more trips, indicating a significant repeat visitor pattern to the Bay within the four months of the summer season.

Second, the monies spent by hosts and guests on accommodation, meals outside the home and visits to attractions and participation in tourism activities have direct consequences on the visitor economy. The survey shows that 40% of the expenditure during a visit is direct spend, outside the home. Indirect expenditure such as food and beverage (28%) could be spent in both locations (at home and outside). Retail shopping, fuel and gifts are indirect spends. The small amount spent on transport tallies with the low use of public transport and rental vehicles.

In terms of the economic impact of VFR, 45 to 65 year olds are the most consistent spenders, but 19 to 25's are peak spenders. The sharing economy of accommodation in private homes arranged through the internet seems to be the best accommodation performer, followed by private homes (this needs more exploration) and value for money offerings such as backpackers are consistent contributors. Visits to friends injects the largest amounts of money. \$1221 new money is spent per visit in the region, and new money added as a result of VFR activity is \$610 per person. VFR then is a strong contributor to the visitor economy of the Bay of Plenty.

Social Dynamics

The reason to visit family and friends was assessed by asking people to rate the importance of a series of reasons to visit, on a scale of 1 to 7. The tables below give average scores across each item, which indicate general preferences for the entire group, visitors and hosts. These are ranked by means scores. Analysis later in this report will look at the influencing factors such as age, gender, etc. to show specific directions of preference and avoidance and a subsequent report will look at relationships between factors.

Reasons to visit

We had assumed that the most important reason for VFR travel would be to visit friends and relatives, but these appear to be secondary concerns. People appear to be motivated to visit for many reasons, many of which are pleasure seeking and experiential.

Table 3 ranks the overall the mean scores of reasons for visit, for both visitors and hosts and shows the most important motive is to have fun and relax. Next, companionship, eat and drink well, have time out with people that you cannot see at home, and go to special local places seem to be grouped. Visiting family and doing activities that you cannot do at home appears to associate with family celebrations. Other reasons such as health and fitness, attend cultural events, compete in sports are ranked much lower. Business reasons and the 'chance to speak your own language' are ranked the lowest of all.

Table 3 Reasons to visit

Rank		Mean	N
1	For fun	5.85	657
2	To relax	5.71	657
3	For companionship	5.06	657
4	To eat and drink well	4.67	657
5	For time out with family	4.49	657
7	To visit local places	4.47	657
8	To visit family	4.39	657
9	Activities not at home	4.18	657
10	For family celebration	3.94	657
11	For health and fitness	3.06	657
12	To attend cultural events	2.26	657
13	To compete in sports	2.17	657
14	For business	1.85	657
15	To speak my language	1.32	657

Likert scale 1 to 7, where 1 is least and 7 is most important

When you compare visitors with hosts, fun and relaxation are the most important for both hosts and visitors. Interestingly, only visitors said that visiting local places is an important reason but hosts think that making a visit to local places is not an important reason to visit them. The family celebration reason to visit is the least important for visitors, yet was the most important motivate for VFR for hosts. It seems that visitors combine family celebrations with other purposes, this might produce tensions between visitors and hosts.

Differences between males and females emerge on several occasions. Females are more likely to want to 'eat and drink well' and value visits to local places more than males. Time out with family is very important for female visitors, compared to males. In contrast, the reason to be able to do activities that you cannot do at home is far more important to males, than to females.

Seventy percent of people above the age of 25 years value the ability to make visits to local places, 'have time out with their own family they cannot have at home' and to 'visit family'. But these are not at all important for under 25 year olds. Again suggesting possible issues that might arise.

However, overseas visitors value the opportunity to visit local places far more than New Zealand residents. Whereas New Zealanders place more importance on visits to family than the international visitors suggesting perhaps that overseas visitors see the trip as an opportunity to combine the visit with other activities.

Easter visitors come to the Bay to visit family and companionship, but this is not important for summer visitors, even when they visit family and friends. Summer visitors combine a visit to family and friends with other leisure activities.

In summary, reason for visit

Clear differences in visit purpose are apparent which have implications for the intention to utilise local hosts as ambassadors. International visitors are interested in the special local places, as do visitors from elsewhere in New Zealand. Females hosts and guests rate visits to local places highly. But overall, hosts are far less interested in showing off the local places

Hosts want to see their family members, but guests make the visit with other intentions as well, combining the visit with other activities, with fun and relaxation, top of the agenda. Companionship, shared food, time out and family visits to local places cluster as a group of preferred activities which could be used for key messages in a marketing campaign. But who are the influencers of activity choices?

Who influences decisions?

Table 4 indicates the influencers of decisions within a host/visitor social group. We had assumed that hosts would be the primary influencers and this is borne out by the highest ranked score.

Table 4 Decisions

Rank		Mean	N
1	Host	4.43	489
2	Travellers	3.54	575
3	Self	3.38	567
4	Spouse	2.46	565
5	Past residents	2.18	564
6	Children	2.02	566
7	Parents	1.70	565
8	Workmates	1.55	561
9	Pre-travel advice	1.48	561

Likert scale 1 to 7, where 1 is little influence and 7 is a lot of influence

When comparing percentages of opinion about who makes decisions, 30% say that the host is the greatest influencer. Some thought that other travellers in their party (40%) and personal ideas (30%) also make a difference, yet 30% also thought that other travellers and their own opinions are not very influential, suggesting that discussion takes place.

The views of spouses and other family members (parents, children) carry little weight, nor do ideas from past residents, workmates or other advice (58% and over, said these had no influence).

There is a strong separation between hosts and visitors in terms of who influences decisions. The guests say that the host is the most important influencer. But hosts are equally divided between a pivotal role in decisions and a sense that their views hold no weight. Advice given prior to travel is highly unimportant for visitors, who seem to decide what they do, on their own, once at the destination, based on their own preferences and that of their host.

Females value the opinion of hosts highly in terms of making decisions during their visits, but males show a decided disregard for their hosts' opinion.

When age groups are compared, the opinions of hosts is very important for over 25 year olds, slightly more important for under 25 year olds but a spouse has little influence. Suggesting that under 25 year olds are slightly more include to listen to the opinion of their host.

In summary, decision making:

Hosts do influence decisions, but appear not to do so without consultation with guests and appear to ignore the opinions of their family members. Female guests and people over 25 are more persuadable than males or younger people.

Patterns of Participation

The range of activities which are included in the survey align with the typology developed for this research (Table 1) and are detailed in Appendix 1, Table 9. The activities in which people take part is affected by demography as well as the information sources used, how they find their way to a location and local infrastructure.

Activities

As expected, the most popular activities that people do together whilst visiting friends and relatives in the Bay of Plenty, focus primarily on free, passive leisure activities that are located at home and on or near the water. Also among the top 10 activities undertaken by both visitors and hosts with visiting family and friends in Table 5, are active leisure pursuits like swimming, surfing, etc. These extend into the active recreation domain of fishing, hunting, tramping, and rock climbing which can be done with personal equipment but otherwise might be considered 'free'.

VFR and their hosts also take part in passive leisure such as going to cafes, sightseeing drives, but do attract an indirect cost - suggesting that these are specific areas where VFR also contribute to the visitor economy, and is reflected in the expenditure figures.

Direct pay-for activities in the top 10 are festivals and events, leisure facilities (swimming and hot pools) and shopping.

The activities that rank below the mid-point on the scale include galleries, craft market, theatre concert and nightlife. included arts, heritage and culture as well as sports (informal as well as organised), health and beauty plus pay-for charters, tours and cruises, Maori culture and work-related activities.

Table 5 Activities

Rank		Mean	N
1	Gardening, beach, picnic	5.34	657
2	Stay at home	5.08	657
3	Cafe, restaurant, vineyard, farmers market	4.91	657
4	Swim, surf, kayak, boat, walk, cycle, jogging	4.89	657
5	Sightseeing drive	4.69	657
6	Festival and events	4.38	657
7	Leisure facilities	3.83	657
8	Fishing, hunting, tramping, rock climbing	3.81	657
9	Shopping	3.64	657
10	Galleries, craft market, theatre concert	3.25	657
11	Bars, night clubs, dance party	3.20	657
12	Informal team games	2.64	657
13	Heritage	2.61	657
14	Organised sports	2.22	429
15	Health and beauty	2.19	657
16	Charters, sightseeing tours, harbour cruise	2.02	657
17	Maori culture	1.69	657
18	Work	1.52	468

Likert scale 1 to 7, where 1 is least and 7 is most important

The first two are not a surprise since these are not well-subscribed across visiting populations, but the lack of engagement in sports is unexpected. This does not mean that the lower ranked activities are not done, just not by as many people or by specific segments. It is important to note the bias towards Europeans in the sample, compared to other ethnicities so the result for Maori culture is a response bias.

When you compare visitor preferences with hosts, shopping is not very important to either but statistically, shopping is a more important activity for hosts rather than visitors.

Active recreation activities such as hunting, fishing, tramping and rock climbing are least important for visitors, but highly important for hosts perhaps because these are more

readily accessible year-round, since they live in the area. The reverse is true for attending festivals and events – which is of much greater interest for visitors than for their hosts. This is an encouraging indication that the events strategy is working to attract out of town visitors in the VFR market segment, noting however that the survey targeted jazz festival visitors in the Easter survey, so this is not a surprising result.

Males and females put similar emphasis on the rankings in Table 5. However, males show a clear preference for the active outdoor adventure-type recreational activities, compared to home based, passive leisure and going to bars than females although the latter is not highly rated overall. Females prefer retail shopping and going to festivals and events more than the males.

People under 25 years do not think activities in the home or going to events are important (in contrast to the over 25's), but preferred adventurous active recreation and going to bars and night clubs. This suggests that the younger VFR are interested in doing a wider and different range of activities than their older counterparts.

Older people value drive sightseeing as a way to spend time together, more than the under 25's, as well as active leisure such as walking, surfing, cycling, etc. They also enjoy festivals and events and appear to be higher users of leisure facilities than the younger group.

However, there is little difference in preferences between overseas and New Zealand visitors for activities but international visitor numbers are proportionately small.

Comparisons of income show that drive sightseeing is much more important for people with below average income than those above the average NZ yearly income of \$32,292. Lower income VFR hosts and visitors also have little interest in going to cafes and restaurants. Shopping too is very important for below average and average income groups, but not at all important for higher income people. The lower income groups also believe attendance at festivals and events is an important activity choice, perhaps because these can be accessed without charge, such as during the jazz festival on the Strand.

Active leisure is of great interest to all visitors and hosts in the Bay of Plenty, regardless of income. Active recreation such as hunting, fishing, kayaking and rock climbing etc. are of particular interest to average income people, compared to either higher or lower than average groups.

In summary, patterns of participation:

While overall, passive and active leisure activities based in the home and in the outdoors are rated as the most important for both VFR visitors and hosts, there is strong preference for active leisure use of indoor leisure facilities such as hot pools for people over 25 years of age. Intrinsically rewarding active leisure has strong appeal for under 25 year olds. Perhaps this an opportunity to position the Bay as a healthy, energetic and personally rewarding destination.

Active recreation is also of particular interest to average income people, compared to either the higher or lower than average groups. However passive leisure and free passive

recreation activities are preferred by below average income recipients, who also enjoy festivals and events.

Engagement levels in informal and extrinsically rewarding organised sports is lower than expected for VFR hosts and their guests.

We can conclude then that while free and passive leisure activities are preferred by VFR, there nonetheless are many activities which either attract a cost (fuel) and make an indirect contribution to the local economy, or are pay-for consumer purchases and so impact directly on the economy, revealing the actual impact that this segment has.

International and domestic visitors prefer and dislike the same things.

These activity preferences reinforce the perception of the Bay of Plenty as a leisure destination, but not just in the leisure at home or at the beach, but also the consumption of a wide range of passive recreational activities and the production of active outdoor pursuits, for this market segment.

Destination Image

Identification of special local places to take your guests are a way to see through the eyes of hosts and visitors about the image you want to portray about the place in which you live.

A full list of all of the places identified is given in Appendix 1, Tables 10 and 11.

The beaches and Mauao, Mount Maunganui stand out above all of the other 'special places' in the Bay of Plenty, named in various ways 97 times. "The Mount" is seen by both visitors and hosts as a scenic, leisure destination where you can take part in urban passive leisure by eating, socialise at cafes, bars and exploring the retail centre and shops. The scenery of the shoreline, beaches and islands are managed encounters with the outdoors and backdrops for active leisure, such as walking, climbing, swimming and surfing. Cruise ship viewing is also mentioned.

Tauranga City is named 46 times as an urbane landscape for special outings with visiting friends and relatives. The Strand features as a core location for passive leisure, access to the arts and culture adjacent to the harbour, itself a place for boat cruises and sailing.

Tauranga's playground and sculptures in the city centre also appear as an engaging place for children.

The Eastern Bays has a different image, of a place for active leisure but also where one can be immersed in the experiences of Kiwi fruit growing and Maori culture, specifically in Te Puke.

The Kaimai Ranges and Western Bays appear to have an outdoor active leisure image since hot pools, waterfalls, kayaking are mentioned, as well as Mills Reef Vineyards. Coromandel, strictly speaking is not in the Western Bays but is at the farthest reach of a western day trip.

Hosts also take their guests on day trips to Rotorua, drawn by its thermal image, as well as to Taupo. Hot pools in the Bay, surfing, walks along the scenic shoreline and beaches are mentioned in general terms.

Specific groupings of walks, special eating places, waterfalls, water activities and shopping experiences are named. For example:

- Walk around Estuary, Papamoa hills walk, walk around the Mount and Mount shops.
- Eat at Thai Restaurant, Mt Maunganui; Le Chat Noir, Greerton; Little Long Café, Spring Street; Astrolabe Bar, Mt Maunganui; Cornerstone Pub Mills Reef, the Strand.
- View the Kaiate Falls, Waterfall North Welcome Bay.
- Swim in Hunters Creek, Poripori road, Kaimai Waterhole, Oropi hot pools, Hot Pools, Mt Maunganui.
- Go to Waimarino for kayaking, sail in Tauranga Harbour/ Mayor Island take a Kewpie (Qp) Boat Cruise.
- Take young children to the playground Kulim Park Otemoetai, Hairy Maclary & Friends Sculpture.
- Shop in the vintage / second hand shops, buy arts and crafts in Tauranga.
- Attend cultural events/ shows at Baycourt.
- Maori marae experiences at Hei Marae, Te Puke

In summary, image of the Bay:

The special places then which epitomise for hosts and guests the best of the Bay, concentrate first at the town, beaches, parks and reserves at Mount Maunganui. But also locate in urban Tauranga and its harbour shores as well as the high backcountry and along the coastlines and horticultural regions, reflecting the variety of physical landscapes.

Water activities such as swimming in hot pools, lakes, creeks and swimming holes, surfing and sailing take place in the wider landscape of the estuary, the harbour, rivers and beaches.

Land-based activities such as walking and driving along the shoreline in the mountain ranges, visits to waterfalls and hillsides, climbing the Mount are enjoyed within the scenic views of the Bay. Hosts and their guests can spend time in healthful and active leisure and immerse oneself in 'kiwi' fruit and Maori experiences.

Destination management

Destination management organisations have an important role to play in marketing and encouraging the development of tourism products and services. Information sources, wayfinding, infrastructure and amenities provided by transport and local authorities can inhibit or enable patterns of participation, regardless of how effective the marketing might be.

Information sources and wayfinding

Table 6 summarises the information sources used and Table 7 includes wayfinding techniques. Unfortunately, more detailed analysis is not available at the time of writing but will be in the next report.

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Word of mouth referrals from family and friends, and ask a local person – not family or friend (total 37.2%) are the most important information media for VFR hosts and visitors.

But Internet and social media are close behind, at a combined 29.1%. Knowledge gained from prior visits is also a key component however, suggesting a high degree of repeat visitation (13.3%). Paper based media such as brochures, printed maps, guidebooks and newsletters represent 7.8%, news media are 5.4% with phone apps only 3.7%. Tourism services such as travel agents and the tourism i-sites are very low in usage.

These figures support the strategy of information provision through family and friends and other local people, for the VFR target market but also, that web-based internet communication technologies are powerful media for marketing services and products in the Bay for VFR.

Table 6 Information sources

Rank		Counts	%
1	Internet	242	20
2	Friends	239	20
3	Family	211	17
4	Prior visit	161	13
5	Social media/blogs	111	9
6	News media (newspaper/radio, tv)	65	5
7	Phone App	45	4
8	Brochure	44	4
9	Booklet	28	2
10	Guidebook	20	2
11	Other	19	2
12	Tourism Website	15	1
13	Travel agent	8	1
14	Council newsletter	3	0
Total		1211	

Wayfinding techniques are linked to the effectiveness of information sources. Table 7 shows that most important technique to get to a location is prior experience and ‘trial and error’.

Table 7 Wayfinding techniques

Rank	Technique	%
1	Self-directed	33%
2	WOM	23%
3	GPS	11%
4	Mobile phone	16%
5	Social media	3%
6	Paper based	7%
7	Directional signs	7%
		100%

Word of mouth directions from family and friends also important, supplemented by other local people taxi drivers and tour guides. Dash-mounted GPS (global positioning systems) and mobile phone GPS also figure strongly. Social advice, paper based techniques and directional signs are the least important.

In summary, information sources and wayfinding:

Web-based internet sources of information and wayfinding feature prominently for VFR hosts and their guests. The experience of prior visits works well however for out of town VFR visitors.

Use of local services

The most frequently used and highly ranked infrastructure and amenities are parking, walking track, rubbish bins and local parks. Toll roads sites just below the mid-point in Table 8 perhaps reflecting a heavy use of cars for transportation. But cycle ways, tourist information and BBQ’s are the least used.

Table 8 Use of local services

Rank		Mean	N
1	Parking	5.19	493
2	Walking Tracks	5.02	657
3	Rubbish bins	4.78	657
4	Parks and reserves	4.74	657
5	Toll roads	3.15	657
6	Cycle ways	2.55	657
7	Tourist information	2.22	657
8	BBQ	1.85	657

Likert scale 1 to 7, where 1 is used a little and 7 is used a great deal

Statistical tests indicate that local buses are not used at all, by either hosts or visitors, nor are barbecues. Walking tracks are very highly used by both visitors and hosts. Similarly parking facilities and rubbish bins are also used a great deal and so are of high importance.

Parks and reserves are not used a great deal by hosts, but they are used very highly by their visiting friends and relatives, indicating a strong amenity value for these recreational spaces for out of town travellers.

Both genders showed the same levels of usage for all services. Both under and over 25 years old use local services at similarly, as do international and New Zealand respondents.

Access to parks is very important for people below, as well as far below the average income level.

VFR opinion

Comments from 136 people can be divided into suggested improvements and compliments. Most mention facilities such as parking and cost, time limits and availability of parking (22 people), buses and bus fare (10), rubbish and the need for recycling (6) as well as toilets (11).

Toilets are mentioned a great deal, mostly in terms of requests for cleanliness, addition of more – at Taylor’s Bay and at the main beach in Mount Maunganui. All of the comments about rubbish are negative, noting poor rubbish collection and no recycling as well as, inadequate dog refuse bins.

Bus services are thought of well, but also poorly. Compliments about the buses (6) have to do with frequency, fares, and the character of drivers. However, negatives outweighed the positives. The bus service is described as “weak” and “needs improvement”. Specific suggestions are increased frequency, a late night service and communications with passengers about disruption/late arrival. People who live in Te Puke and the outskirts of Tauranga are looking for increased service.

Compliments are made about general experience of being in the Bay of Plenty, its facilities and sense of place, services and the friendliness of local people.

Suggestions are also made about the lack of information services and need for promotion of the Bay (3 mentioned lack and 6 promotion) and its events programme (3). Ideal infrastructure improvements mentioned are road signs (5), cycle lanes and the walkway; as well as better water stations, life guards and beach signs, showers, BBQs and shade areas. Flat and less crowded walk ways for elderly people, as well as a dedicated walkway from Papamoa to the Mount. Wider cycle ways are requested by 2 people, as is better road signage.

Leisure activities are also noted, for example “nothing to do when it rains” (2), but also suggested Maori culture, bush walks, live music and better access to the heritage village.

The figures below are ‘word clouds’ that shows by size of text and clusters of word proximity the areas of major through to lesser concerns to hosts (Figure 1), and the opinions of visitors (Figure 2). The views of visitors are under-represented (only 34 people) but hosts (102 people) are eager to comment.

In summary, local services and infrastructure:

Overall, then comments on the services offered by Tauranga City Council focused on the need for good services and toilets as well as freely available parking, buses, rubbish bins. The beaches, parks and walking tracks are greatly appreciated. There is a focus on the need too for rubbish collection and recycling for Tauranga. Public buses, toilets and the importance of efficient ways of getting around the Bay are also noted.

Local authorities could counter these criticisms by planning and investment in infrastructure and services for waste management, sanitation and buses, as well as measures to alleviate parking and pedestrian congestion,

The amenity value of the Bay, its scenery and its outdoor environs are greatly appreciated by both hosts and guests but the image of the destination is marred by dissatisfaction with traffic congestion and at peak times, inadequate sanitation and waste management.

Potential barriers to participation and positive destination image are information services which may deserve a rethink.

Conclusions

This research confirms that Tourism Bay of Plenty can see that local hosts of visiting friends and relatives (VFR) can be encouraged to play a larger part in the tourism economy of the Bay. Local hosts are the key referrers for VFR visitors and influence decisions made by their guests. However, web-based internet communication technologies (ICT) are used by all hosts and guests and should be a key focus for the future.

VFR hosts are more likely to be women and have lower income than their guests. VFR come from the Waikato, Auckland, Australia and the UK. VFR make short-term weekend visits, prefer passive and active leisure and recreation but are repeat visitors. Seventy percent of all the people surveyed are either VFR hosts or guests. VFR come to the Bay to combine a visit to family and friends with other activities outside the home. The Bay is perceived as an active and passive leisure destination.

VFR activity contributes \$1221 per visit directly and indirectly to the visitor economy, through purchases made by hosts and their guests. Given that the usual group size is 2, this is a minimum of \$610 per person. VFR stay in family homes and in pay-for accommodation so operate to some extent outside formal tourism industry but buy food, fuel and gifts, dine out, go to attractions and otherwise add a substantial spend per head to the region.

Local government services that add to the quality life in the Bay, such as parks, reserves and walkways are greatly appreciated by VFR hosts and guest, but some such as traffic congestion, parking, sanitation and waste contribute to a negative image.

The Bay could position itself for the VFR market as an urbane and family friendly place, where one can interact with local people and access many types of experience 'from the mountains to the sea within 20 minutes' drive from Tauranga. A series of experiences could be packaged together to reflect the character of these special places and offer each segment of the VFR groups: scenic drive tourism to the Kaimai's, marae and kiwi fruit immersion in Te Puke, urban leisure at the Mount and Tauranga, active health around the

estuaries, thermal tours to hot pools, sailing and fishing on the harbour, tours to the islands, etc.

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Appendices

Table 9 Activity typology for survey items - passive to active leisure and recreation

Activities	Passive	Active
Leisure	<ul style="list-style-type: none"> • 'At home' (talk, eat & drink, TV, read, computers, social media) • Work-related (do business whilst visiting, catch up on work) 	<ul style="list-style-type: none"> • Swim, surf, kayak, boating, walk, cycle, jog/run • Visit leisure facilities (hot pool, swimming pool, fitness)
Recreation (Free) (Pay for)	<ul style="list-style-type: none"> • Gardening, lie on the beach, go on picnics • Drive in a car to see places of interest • Go shopping • Health and beauty • Go to cafes and restaurants, visit vineyards, farmers markets • Go to bars, night clubs, dance parties • Attend festivals or special events (food, music, art, garden) • Go sightseeing (booked tours, trips) • Charters and tours (fishing, hunting, white water rafting, jet boat, swim with dolphins, yacht) 	<ul style="list-style-type: none"> • Go fishing, hunting, tramping, rock climbing
Sport	<ul style="list-style-type: none"> • Play Informal team games (touch rugby, soccer, cricket, kilikiti) 	<ul style="list-style-type: none"> • Play or watch organised sports (cricket, volley ball, waka ama)
The arts	<ul style="list-style-type: none"> • Visit art galleries and craft markets, theatre and concerts • View heritage (museums, historic houses, tours, historic pa sites) 	<ul style="list-style-type: none"> • Maori cultural activities (indoors or outside at a marae)

Table 10 'Special places' - Mount Maunganui and Tauranga

'Special Place'	Count	'Special Place'	Count
Mount Maunganui		Tauranga	
Mt Maunganui	22	Jazz Festival	15
Mt M Beach	21	The Strand	6
Walks Mt M	13	Dinner out, The Strand	3
Climb Mount Maunganui	10	Local festival on The Strand	2
Mt M downtown	4	Sailing TGA harbour	1
Mt M shopping	3	Cultural events, Baycourt	1
Bayfair	3	Downtown Tauranga	1
Mt M cafes	3	Kaimai Ranges	1
Drink/Bars Mt M	3	Otumeotai Beach	1
Surfing, Mt M	2	Playground Kulim Park	1
Swim Mt M	2	Cafes in Tauranga	1
Astrolabe Bar, Mt M	2	Arts and crafts in Tauranga	1
Bars Mt M	2	QP boat cruise	1
View the coastline, Mt M	1	Cornerstone Pub	1
Cruise ship viewing	1	National Orchestra	1
Mt M Parks	1	Harbourside	1
Bike riding, Mt M	1	Vintage/second hand shops	1
Thai Restaurant, Mt M	1	Hairy McLary Café	1
Little Long Café, Mt M	1	Le Chat Noir, TGA	1
Triathlon, Mt M	1	Shows at Baycourt	1
Fishing, Mt M	1	Horseriding. Gate Pa	1
<i>TOTAL</i>	<i>97</i>	<i>TOTAL</i>	<i>46</i>

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Table 11 Special Places - Eastern Bays, Western Bays, Kaimai Ranges, At home, Rotorua, Taupo and General

'Special Place'	Count	'Special Place'	Count
Eastern Bays		Western Bays	
Papamoa Beach Road	2	Coromandel Peninsula	2
Papamoa hill walk, Papamoa	1	Mayor island	1
Surfing Papamoa	1	<i>Subtotal</i>	<u>3</u>
<i>Subtotal</i>	<u>4</u>	Waimarino, Wairoa River	1
Kiwi 360, Te Puke	3	Mills Reef, Bethlehem	1
Otanewainuku, Top of No2 Rd, Te Puke	1	Waimarino Kayaking	1
A kiwifruit orchard, Te Puke	1	Kaikati Waterfalls	1
Wharenui Tours Marae Experience at Hei Marae	1	Hunters Creek, between Rangiwai and Matakana Is	1
<i>Subtotal</i>	<u>5</u>	<i>Subtotal</i>	<u>5</u>
Maketu Beach, Maketu	1	<i>TOTAL</i>	<u>8</u>
<i>TOTAL</i>	<u>10</u>		
Kaimai Ranges		General	
McLaren Falls	7	Hot Pools	3
Poripori road, Kaimais	1	Surfing	2
Oropi hot pools	1	Scenic shoreline	2
Kaimai Ranges	1	Beach	2
<i>TOTAL</i>	<u>10</u>	Statue	1
At home		Boat trip	1
Chill/chat at home	4	Walk around Estuary	1
Pool at home	1	Entertainments	1
<i>TOTAL</i>	<u>5</u>	Beach house	1
Rotorua		Water activities	1
Visit thermal Rotorua	6	Sports	1
Tamaki Maori Village	2	Walking	1
Luge Rotorua	1	<i>TOTAL</i>	<u>17</u>
Branns Farm/Bush, Roydon, Paengaroa	1	Taupo	
Skyline Gondola, Rotorua	1	Lake Taupo	1
Redwood Forest, Rotorua	1	Huka Falls	1
Rotorua Lakes	1	<i>TOTAL</i>	<u>2</u>
Okera Falls, Rotorua	1		
<i>TOTAL</i>	<u>14</u>		