Nelson City Camper Survey 2020/21

Nelson City Council
te kaunihera o whakatū

Executive Summary

Over the summer of 2020/21 Xyst Ltd carried out a survey of campers who utilised eight free camping facilities provided by Nelson City Council. The survey was a repeat of the survey carried out a year previously in the summer of 2019/20 and which finished just prior to Covid lockdown in March 2020.

The aim of the 2020/21 survey was to build on the understanding of campers in Nelson City developed from the 2019/20 survey to improve strategic responses to camping issues.

The survey found not all campers using free camping sites in Nelson are the same. From the 170 campers surveyed, six distinct types of campers were identified, they are:

- Working Holiday Tourers (27%)
- Long Term International Visitors (18%)
- Short Stay Holiday Makers (17%)
- Local Campers (16%)
- Domestic Holiday Makers (14%)
- Short Term International Visitors (5%)

(refer to Camper Profile section of this report for the characteristics of each type of camper and changes in numbers since the last survey).

Although the majority of all respondents surveyed were international, this cohort had fallen from 93% to 61% of respondents with New Zealanders increasing from 7% to 39% of respondents. International respondents are still predominantly from Europe and the UK (71%) but the numbers from Germany and France have fallen significantly and no longer make up the majority of respondents from Europe and the UK. The 20 to 29 year age range is still the largest age cohort but there are more older respondents and fewer under 20 years in 2020/21.

The number of Working Holiday Tourers has fallen dramatically, but this group is still the largest category of camper at 27%. Short Term International Visitors have also fallen and now make up around 5% of campers compared with 36% at the last survey. Two new categories for Long Term International Visitors and Domestic Holiday Makers comprise 32% between them and represent categories of campers that barely existed a year ago. Due to the greater number of camper profiles and the more balanced spread of respondents into these categories, there is less clear correlation between camper profiles and camper behaviour this year.

Families with children still make up a very small portion of all respondents, with the majority of campers being couples without children or solo campers.

Modified vans/people movers were the most common vehicles camped in across all respondents. Rented vehicles were very uncommon with almost all being privately owned.

Around 99% of all respondents vehicles had a current self containment certificate. However, given responses to individual questions about toilet and dishwashing facilities, it is likely that at least some of these vehicles should not have been certified. Portable toilets were the most common toilet facility. Although almost all vehicles had toilet facilities, only 39% had been used on this trip. This is an increase in toilet usage since the last survey. Shower facilities were less common than toilets and dishwashing facilities in vehicles.

Over the five days prior to the survey respondents spent 64% of total nights at free camping sites, down from 80% in 2019/20. Paid campsites were the next most common and had increased since 2019/20. Very few respondents stayed in other forms of paid accommodation.

Only a third of all respondents identified having a total budget for for their trip, and only 20% identified having a budget for daily expenses with the median budget being $40 per person per day. There was no clear correlation between the size of budget and camper profiles.

The highest average spend on daily expenses over the five days prior to the survey was on groceries followed by fuel with the lowest on vehicle hire. Very few respondents gave any information on spending on events, activities and attractions this year meaning that no conclusions could be drawn about spending in this area.

Respondents rated their overall camping experience in New Zealand more highly than in 2019/20 with 83% rating it as better or much better than expected. The camping experience related to individual sites varied with the most favourable ratings coming from Isel Park and Maitai Cricket Ground.

The use of camping Apps, in particular CamperMate, was the most common way respondents found free camping sites in Nelson. Prior to camping at a free camping site provided by Nelson City Council, the majority of respondents had either stayed locally or come from other areas within 2 hours drive in the Nelson/Tasman region or from Marlborough. Takaka/Golden Bay was the most common destination respondents intended to visit next with the majority of other next destinations being within 2 hours drive from Nelson City Centre.

The Covid-19 pandemic that started following the last survey has produced some significantly different results this year:

- Fewer international visitors and more kiwis
- Fewer travelling on working visas and more not working (on holiday)
- Fewer under 20's and more over 60's
- Fewer groups of friends travelling together and more solo campers
- More people travelling for both short and long terms and less in the 1 to 6 month range.
- Increased spending in most categories except vehicle rentals and activities/attractions
- Less use of rental vehicles and more use of paid camp sites

Comparative summary of survey data

2020/21	Data	2019/20 results
61%	International visitors	93%
63%	Travelling or staying in NZ for six months+	47%
97%	of campers had toilet facilities onboard	87%
$75	median spend on fuel over 5 days	$60
68%	of campers didn't have a total budget for their trip	64%
95%	felt the Nelson free camping locations were as expected or better	92%
56%	campers under 30 years old	68%
63%	of total nights were spent at free camping sites	80%
$100	median spend on groceries over 5 days	$60
$40	Median daily budget per person for expenses	$25
72%	used camping apps to find the free campsite they were at	87%
4%	of total nights spent in paid accommodation (excluding campsites)	3%
2%	Families with children	4%
0%	of rental vehicles were purpose built campervans	59%
$15	or less per day average spend on accommodation over five days	$10
78%	did not spend on events or activities over previous five days	70%
30%	intended staying 2 nights at their current location	52%
47%	intend their next destination to be within the Nelson/Tasman region	63%

Introduction

Xyst Limited was engaged to undertake a survey of campers who utilised the freedom camping facilities provided by Nelson City Council over the summer of 2020/21. The survey was a repeat of an earlier survey completed the previous summer (2019/20). The initial aim of the survey was to improve the Council's understanding of the nature of freedom campers in Nelson City so that the Council can make improved strategic responses to camping issues. The purpose of the repeated survey was to allow comparison of results over time and with the effects of Covid-19.

The survey was funded by the Ministry of Business, Innovation and Employment (MBIE) from the 2019 Responsible Camping Initatives fund (Tourism Facilities Development Grants).

Context

Nelson City provides a number of opportunities for campers to stay within the city.

Camping in non-self-contained vehicles or tents is not permitted on any Council administered land within Nelson City apart from within an official campground or with a private accommodation provider. The Nelson City Council actively enforces the rules around Freedom Camping within the Nelson area under its Freedom Camping Bylaw. There are four motor camps/holiday parks provided within the city to accommodate these campers.

For those travelling in certified self-contained vehicles (CSC), designated sites have been established with limits on the numbers of campers that can stay at each site and the times at when campers can occupy the sites. These sites are free to use and are generally well utilised. There are eight such sites provided in and around Nelson City.

During the summer of 2019/20 the Council provided a day use Camping Hub at the former Shell Petrol Station at 20 Halifax Street with toilet, shower and waste disposal facilities. The Camping Hub was not provided in the 2020/21 summer season.

Method

Xyst undertook face-to face interviews with 170 campers located at one of the eight free camping sites using preset questions developed by Xyst and NCC. Questions were the same as in 2019/20, and focused on the following six areas:

1. Demographics, origin and destination
2. Vehicle type and use of self-contained facilities
3. Use of accommodation other than freedom camping
4. Campers' budget and level of expenditure
5. Satisfaction with facilities
6. Willingness to pay

Responses were recorded on a mobile device and submitted securely to Xyst's survey tool Yardstick.The table below shows the location and the number of interviews conducted at each site.

Interview Location	No.
Montgomery Car Park	27
QEII Drive Gardens Car Park	34
Wakatu Car Park	10
Trafalgar Park (Kinzett Terrace Car Park)	31
Isel Park Car Park	30
Maitai Cricket Ground Car Park	18
Buxton Car Park	18
Wakapuaka Reserve Car Park	2

Camper profiles

As in 2019/20, many respondents could be categorised into one of four camper profiles. However, in 2021 a further two profiles were added for Long term international visitors and Domestic holiday makers. These two new categories accounted for 32% of respondents.

Working Holiday Tourers

International long-term visitors are those who generally spend more than six months in New Zealand and travel on a temporary working holiday visa. This group works in other regions and takes the opportunity to travel and see different parts of the country during time off work or in between jobs. They travel in privately owned vehicles that have been modified for camping, stay for longer periods of time, spend less on daily expenses such as food, accommodation, entertainment and eating out. Very few have any identified budget for activities. As they are extremely budget conscious, they mostly stay in free campsites and only use paid campsites where there is no other choice.

- 27% of respondents down from 51% in 19/20
- 91% stay 6 months + up from 68% in 19/20
- 70% aged 20 to 29
- 100% in modified vans up from 89% in 19/20
- 43% German/French down from 65% in 19/20

Short Term International Visitors

International short-term visitors are those who spend less than three months in New Zealand and are travelling on a visitor visa (not working). They travel predominantly in privately-owned modified vans/people movers. They stay for shorter periods of time, spend more on attractions and activities, less on eating out and stay mostly in free campsites where possible but also utilise paid campsites.

Numbers are down significantly for this category probably due to Covid related travel restrictions. The small sample size of 8 in 20/21 increases the margin of error for results for this group.

- 5% of respondents down from 36% in 19/20
- 50% stay 1-3 months down from 68% in 19/20
- 88% aged 20 to 29
- 12% rent vehicles down from 86% in 19/20
- 38% from UK/Europe down from 72% in 19/20

Long term International Visitors

International long term visitors are those who spend 3 months or more travelling (not working) in New Zealand on a visitor visa. This group travels exclusively in privately owned modified vans/people movers. They stay for shorter periods of time (77% for one night only), spent slightly more on eating out and hospitality, and slightly less on attractions and activities. They stay mostly in free campsites where possible only utilising paid campsites where necessary.

This category did not have significant numbers in 2019/20, and may have become more numerous due to the impacts that Covid-19 travel restrictions have had on working visas.

18% of respondents

97% stay 6 months +

71% aged 20 to 29

61% were couples without children

77% from UK/European countries

Domestic Holiday makers

Domestic holiday makers are New Zealanders that were travelling and not working in the Nelson region and other areas for longer than 1 month. Shorter stays are covered in the Local Camper and Short Stay Holiday makers categories. This group own their own vehicles which are predominantly modified vans or people movers. They stay at both free and paid campsites, and spend slightly less on accommodation, hospitality and eating out, and very little on activities and attractions. Ages are spread from 20 to over 70, with two thirds being couples without children.

The increase in domestic tourists can probably be attributed to travel restrictions from Covid-19.

14% of respondents

37% travelling for more than 6 months

21% aged over 70

17% staying in purpose built campervans or motorhomes

67% were couples without children

Local Campers

Local campers are a mix of longer-term international visitors and New Zealand residents. The majority work in the district and seek to utilise free camping sites and their vehicle, which is generally a modified van/people mover, as a semi-permanent low-cost accommodation option. This group is extremely budget conscious, has the lowest personal expenses budget and rarely have any budget for activities. This group also includes a small sub-group (4) of New Zealanders who live in the Nelson district but don't work and their vehicle is their primary long-term accommodation.

16% of respondents up from 10% in 19/20

82% work in region

39% solo campers down from 45% in 19/20

39% New Zealanders up from 30% in 19/20

Short Stay Holiday Makers

These campers are generally New Zealanders visiting the district on holiday for short periods up to 1 month. The majority travel in their own modified vans/people movers and stay in both free and paid camp sites. This group has the highest average daily expenditure on fuel, eating out/hospitality, accommodation, groceries, and activities/attractions.

This group has greater numbers than in 2019/20 probably due to Covid related travel restrictions.

17% of respondents up from 3% in 19/20

62% over 40 yrs old down from 67% in 19/20

21% purpose built down from 100% in 19/20

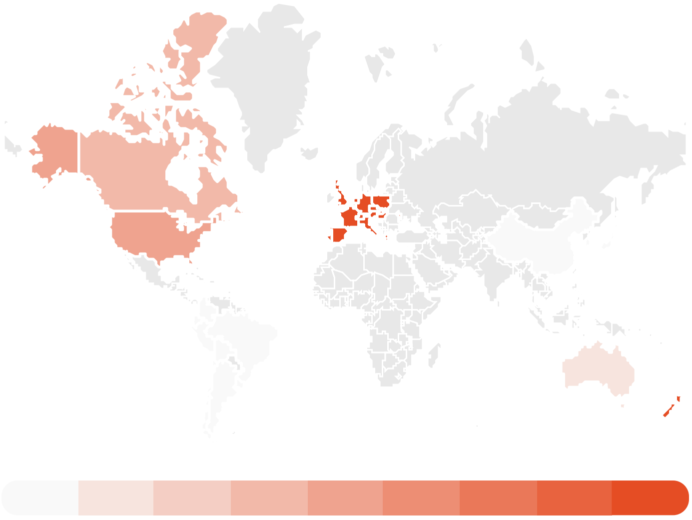
86% New Zealanders up from 83% in 19/20

Survey Analysis

The results of each question asked is shown by questions below. Insights are provided into the results of each question by camper type.

What is your country of origin - where are you from?

	Nationality	2020/21	2019/20
	Germany	12	58
	France	29	45
	Other European country	22	31
	UK	18	19
	New Zealand	66	14
	USA	5	8
	Australia	2	6
	Canada	4	5
	Other	12	7



Insights

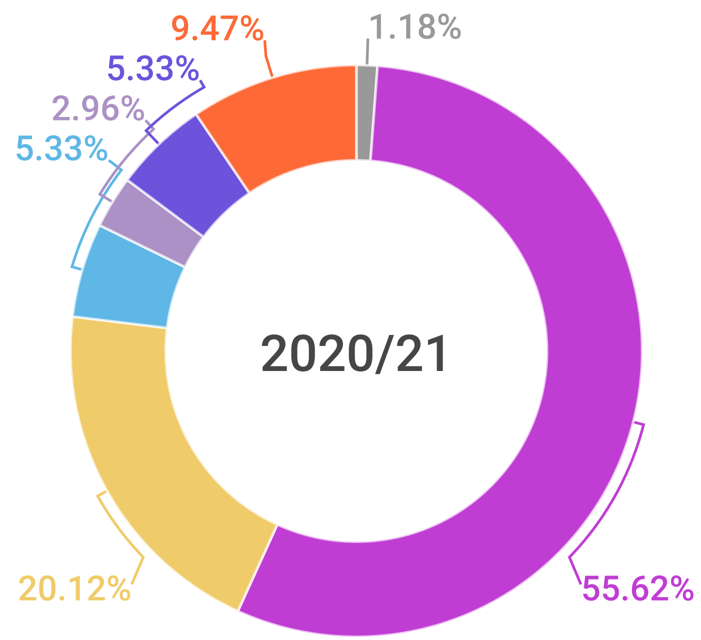
Only 61% of respondents were international in 2021 with the remaining 39% being New Zealanders. This compares with 93% international visitors in 2020, and only 7% of respondents from New Zealand.

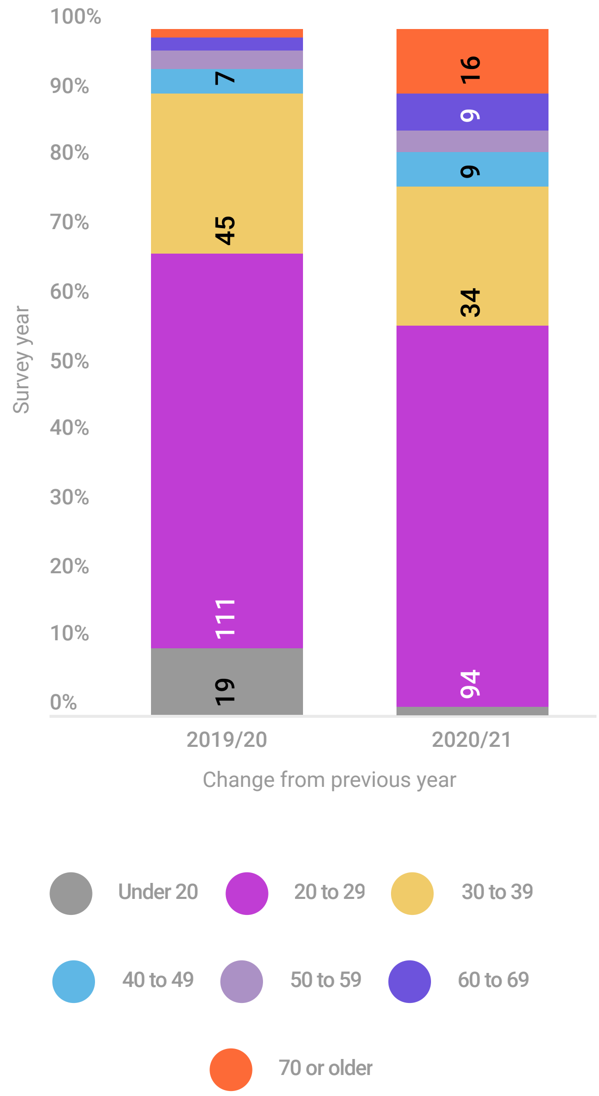
Of the 104 international visitors, 71% were from Europe and the UK. This is slightly lower than previous results. Visitors from Germany (7%) and France (17%) were well down this year, and made up less than a quarter of the total respondents compared with 53% between these two countries in 2019/20. Of the 41 visitors in this cohort, 80% were under the age of 30, much the same as in 2019/20.

Of the international visitors, 86% intended to stay in New Zealand longer than six months. This compares with 42% in 2019/20.

The biggest change was in the number of New Zealanders, which increased nearly five-fold from 14 to 66 from 2019/20 to 2020/21. Significant changes in visitor country of origin and numbers are likely to be related to Covid-19 travel restrictions.

What best describes your age group?





Insights

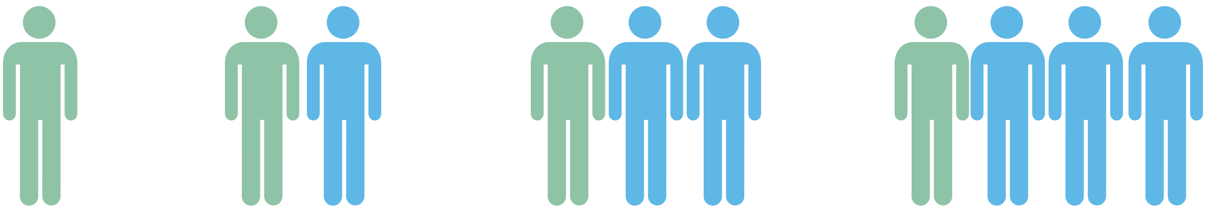
Although the majority (56%) of respondents were under 30 years old, this has fallen from 68% in 2019/20. The largest change in this group were the under 20's which fell from 19 to 2.

Of the 96 under 30's, 33% were Working Holiday Tourers (down from 52% in 19/20) and 7% (down from 29% in 19/20) were Short Term International Visitors. The next largest group was the 30-39 age group who represented 20% of respondents. This age group was fairly evenly split between Working Holiday Tourers, Long Term international Visitors, Domestic Holiday makers and Local Campers.

Respondents under 40 years old were mostly (78%) international visitors. Respondents over 40 years old were predominantly (95%) New Zealanders in the Short Stay Holiday Maker, Domestic Holiday Maker and Local Camper categories.

The number of over 70 year olds has increased dramatically from 2 to 16. All of the over 70's are New Zealanders.

How many people (including yourself and any children) are you travelling and camping with?



56 Travelling alone

104 Travelling with one other

3 Travelling with two others

2 Travelling with three others

Insights

56 respondents (33%) of respondents were travelling alone in the 2020/21 survey, up from 19% in the 2019/20 survey. 61% of respondents were travelling with one other person, down from 75% in 2019/20. Of those 104 respondents travelling with one other person, 60% were international visitors.

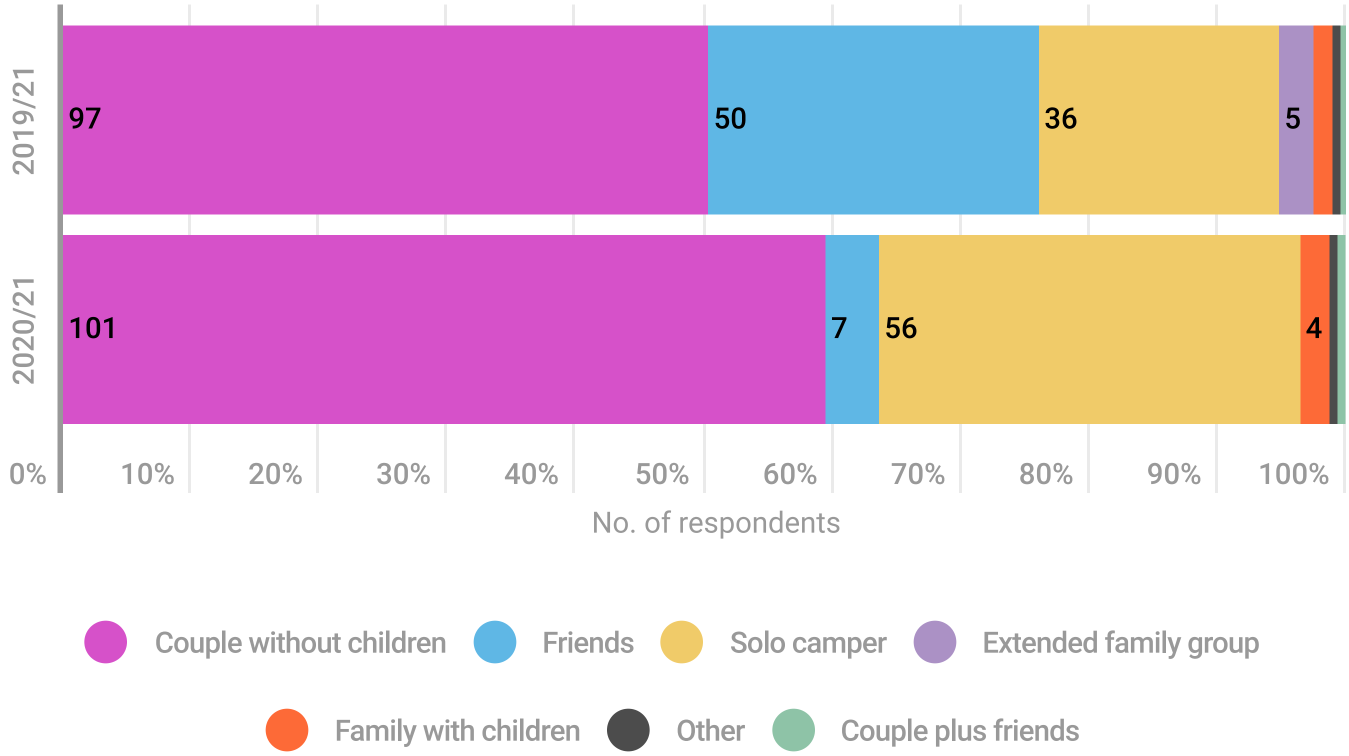
59% of respondents described themselves as couples without children (up from 50% in 2019/20). Only 7 groups (4%) described themselves as friends travelling together in 2020/21 compared with 30% in 2019/21.

Only three respondents were travelling in a group of three compared with nine in 2019/20. Two of these three groups were families with children.

Only two respondents were travelling in a group of four; both were New Zealanders travelling as a family with children.

The main change in the size of groups since 2019/21 is the increase in solo campers and decrease in groups of two or more.

What best describes the group of people you are camping with?



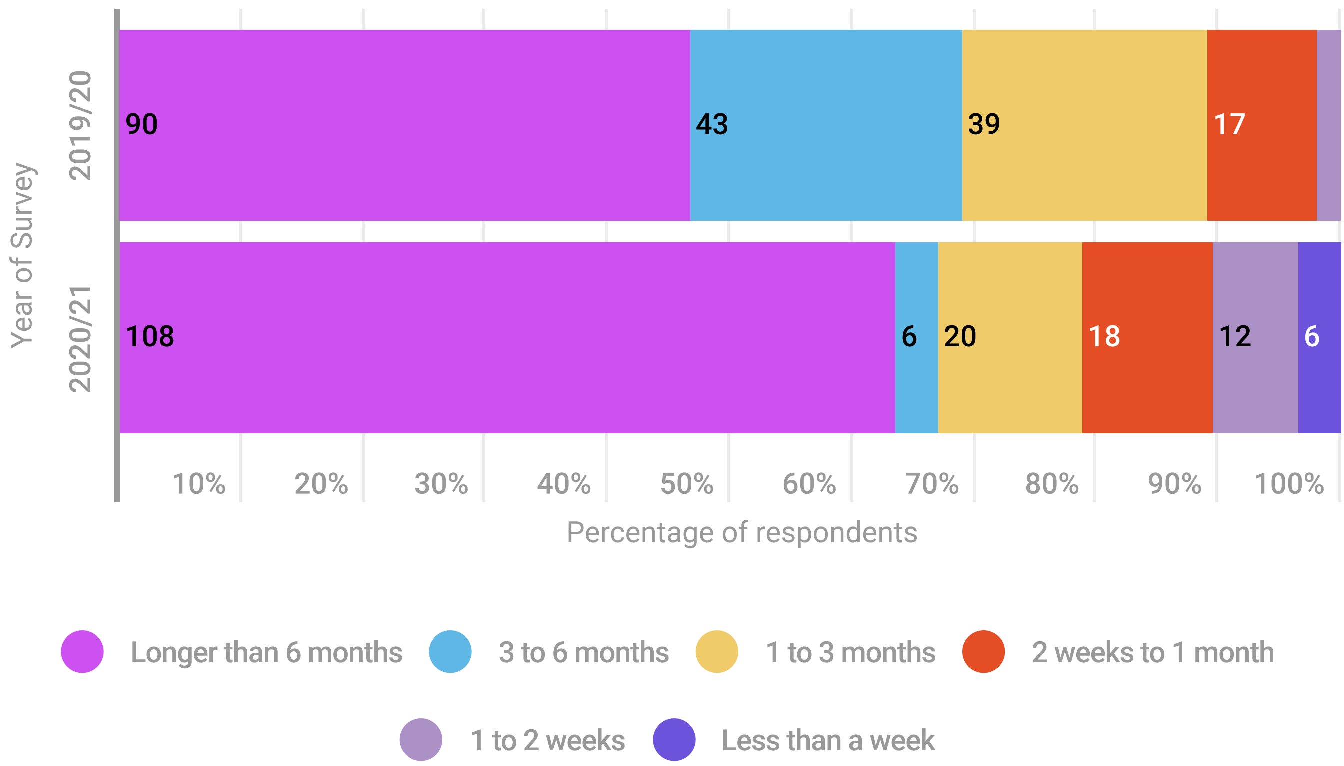
Insights

59% of respondents described themselves as couples without children. This is still the largest age cohort. Of those, 57% were under the age of 30 and 59% were international visitors.

The number of solo campers has increased from 36 (19%) in 2019/20 to 56 (33%) in 2020/21. The majority (79%) of solo campers were travelling/camping for more than 6 months and were split between Working Holiday Tourers, Long Term International Visitors and Local Campers. Solo campers made up 39% of all Local Campers in 2020/21 compared with 50% in 2019/20.

Families with children only represented only 2% of respondents (down from 4% in 2019/20). They were all New Zealanders compared with last year when most were visiting from the UK. Most were Short Stay Holiday Makers with one family being in the Local Camper category. The numbers of groups friends travelling together has also declined, possibly due to individual international travellers returning due to the Covid pandemic and breaking up the group.

How long is your trip within New Zealand?



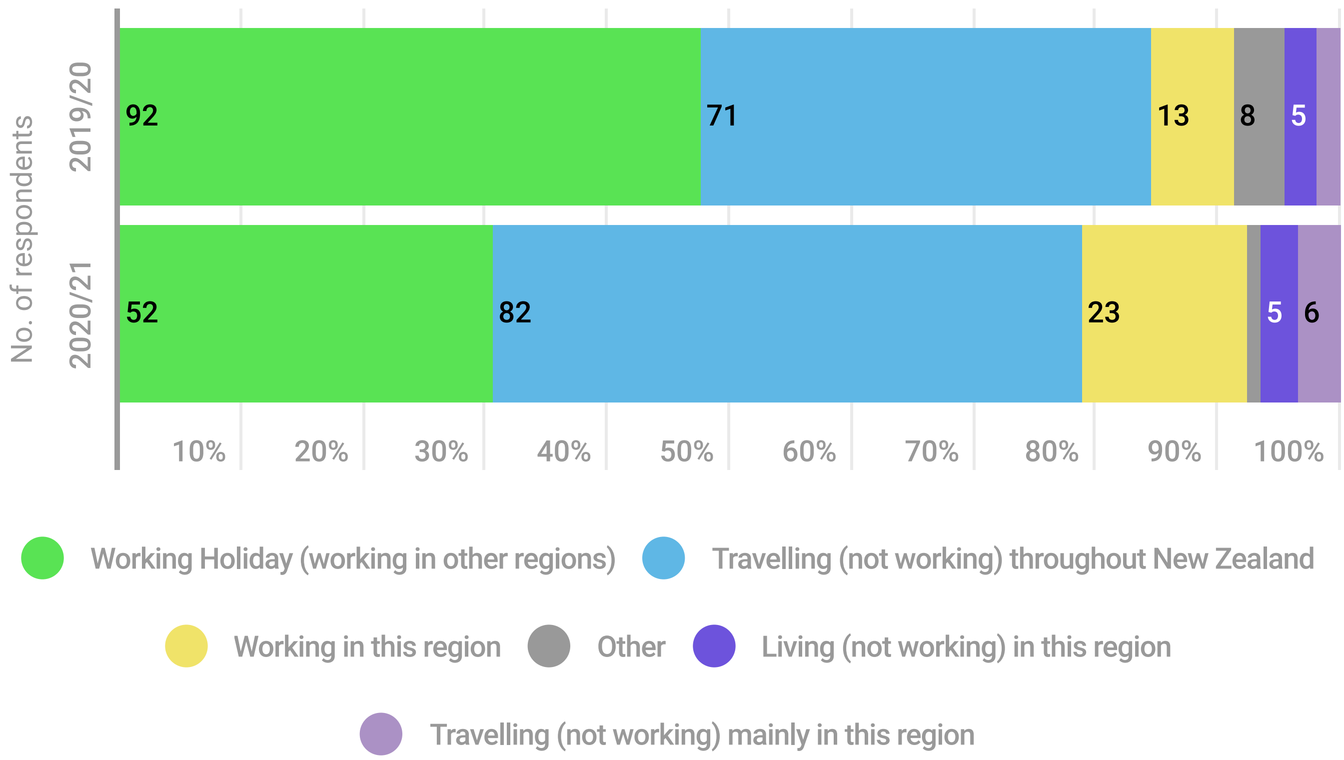
Insights

In 2020/21, 64% of respondents intended travelling in New Zealand for longer than six months, and increased from 47% in 2019/20. Of those, 40% were Working Holiday Tourers (down from 74%) and 54% were from Europe, particularly Germany and France, down from 71% in 2019/20. The decrease in Working Holiday Tourers and European visitors amongst this cohort of long term travellers has been made up by an increase in Long term International Visitors and Domestic Holiday Makers.

Respondents travelling for between three to six months dropped significantly from 22% to 3.5%, and in 2020/21 were predominantly New Zealanders. Similarly, 79% of those travelling for up to three months were New Zealanders. This group was made up predominantly of Short Stay Holiday Makers, Domestic Holiday Makers and Local Campers. Short Term International Visitors made up only 14% of the cohort travelling for three months or less compared with around 77% in 2019/20.

Those travelling for two weeks or less increased from 2% to 11% in 2020/21. Of note there was a cohort in the less than 1 week category which there hadn't been in the previous survey. 83% of the two weeks or less category were New Zealanders.

What is the purpose of your trip?



Insights

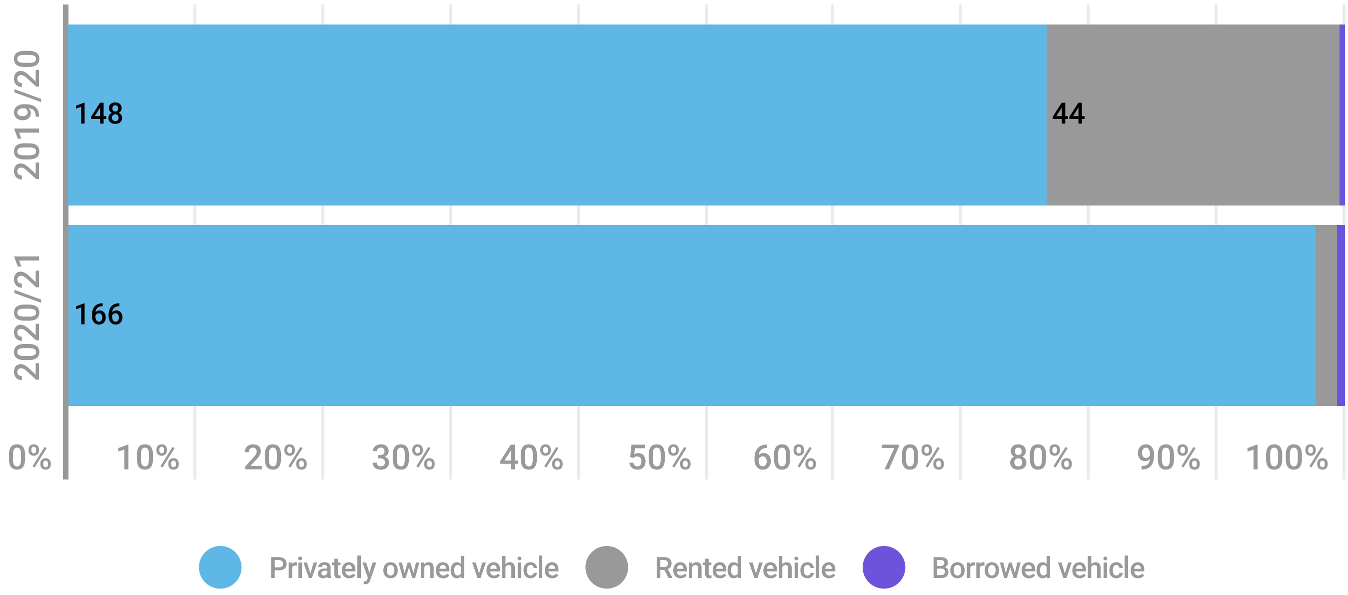
The biggest change from 2019/20 to 2020/21 was the reduction in respondents whose purpose of travel was a working holiday working in other regions of New Zealand. This cohort dropped from 48% to 31%, but is still predominantly under 30 years old (70%) and from Mainland Europe (77%). This is consistent with reduced numbers in the Working Holiday Tourer category.

The numbers travelling (not working) throughout New Zealand have risen from 37% of respondents in 2019/20 to 48% in 2020/21. This is now the most common purpose for the trip. In 2019/20 this cohort were mostly international visitors but in 2020/21 are 57% New Zealanders. International visitors in this cohort are more likely to stay for more than 6 months and New Zealanders for up to 3 months.

14% of campers surveyed were working in the Nelson region, up from 7% in 2019/20. Of this group, 78% intended staying longer than six months compared with 61% in 2019/20. 26% of those working in the Nelson region are New Zealanders.

All five campers who identified they were living but not working in the Nelson Region were from New Zealand and 80% of these respondents were aged over 50. Most intended to stay longer than six months.

How are you travelling between camp sites?



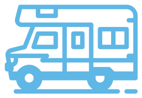
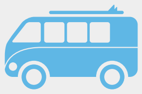
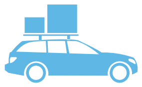
Insights

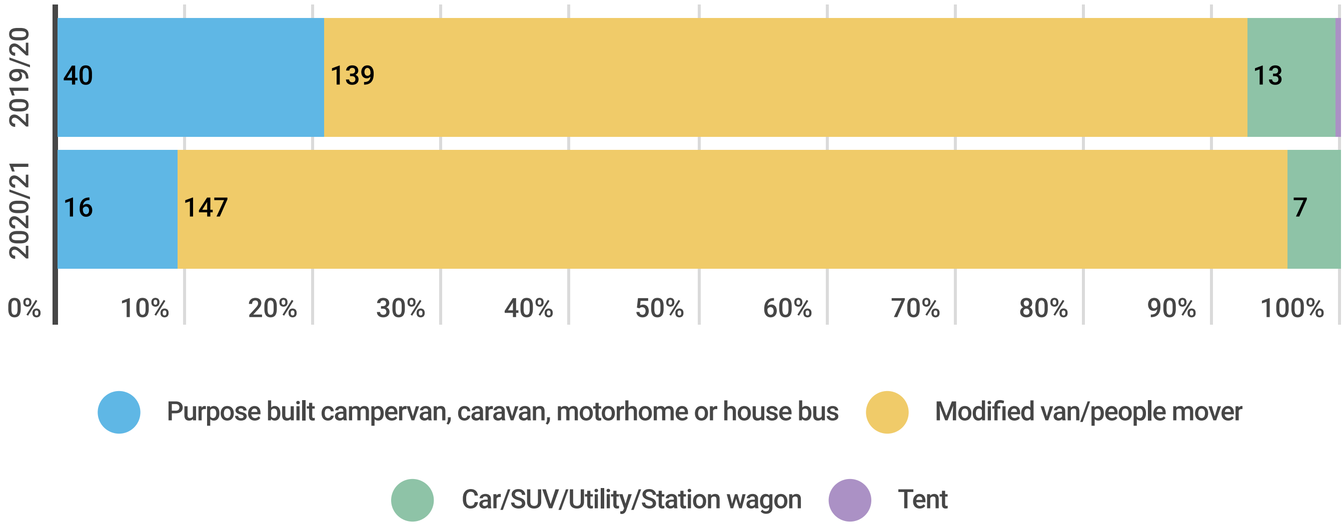
The biggest shift since 2019/20 has been in the number of rented vehicles which has fallen from 23% to only 2%. There has been a similar increase in privately owned vehicles from 77% to 98% with borrowed vehicles remaining relatively unchanged.

The majority (98%) of respondents travelled in personal vehicles (privately owned) with 86% of these being modified vans/people movers. Significantly less (10%) travelled in privately owned purpose-built campervan/caravan/motorhome and only 4% in privately owned car/SUV/utility/station wagon.

In 2019/20 the majority of rented vehicles consisted of self-contained purpose-built campervan/caravan/motor homes (59%). However in 2020/21 all three rented vehicles were modified vans/people movers. All three rented vehicles were used by respondents travelling for 1 to 2 weeks and not working (two NZers and one International).

What are you camping or sleeping in?

	Vehicle type	2019/20	2020/21
	Purpose built campervan, caravan, motorhome or house bus	40	16
	Modified van/people mover	139	147
	Car/SUV/Utility/Station wagon	13	7
	Tent	1	0



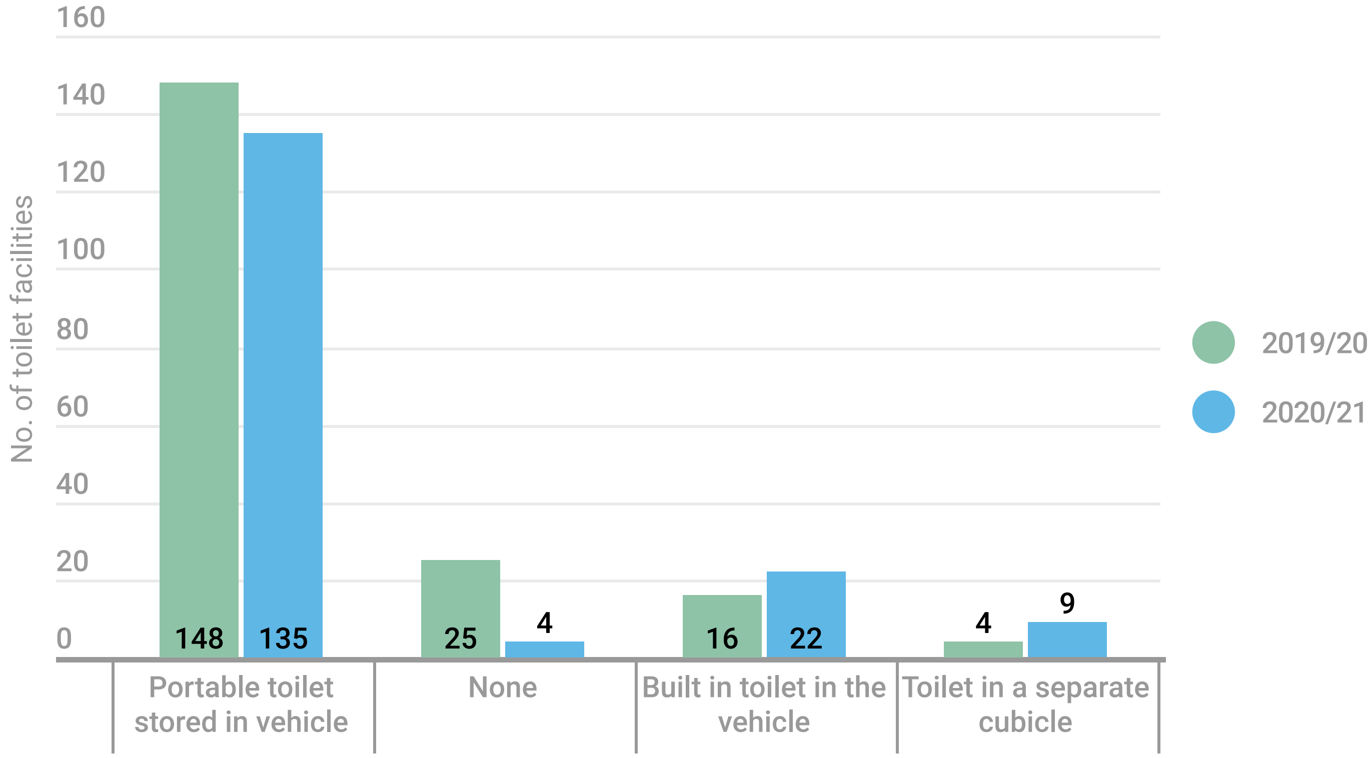
Insights

Modified vans/people movers were the most common vehicle to camp in for most respondents, regardless of demographic, travel purpose or trip duration, and have increased from 72% to 86% of vehicles since 2019/20. All international visitors and 64% of New Zealanders used modified van's or people movers.

9% of respondents camped in purpose-built campervan, caravan, motorhome or house buses, down from 21% in 2019/20. Of this group, all were privately owned by New Zealanders, 69% of which were traveling for less than three months.

Camping in a car/SUV/Utility/Station wagon was the least popular with only 4% using this option. As with purpose built campers, all these vehicles were privately owned by New Zealand respondents and most were travelling for less than 3 months.

What toilet facilities have you brought with you?



Insights

Portable toilets stored in the vehicle were the most common toilet facility across all vehicle types and accounted for 79% of all toilet facilities compared with 88% in 2019/20.

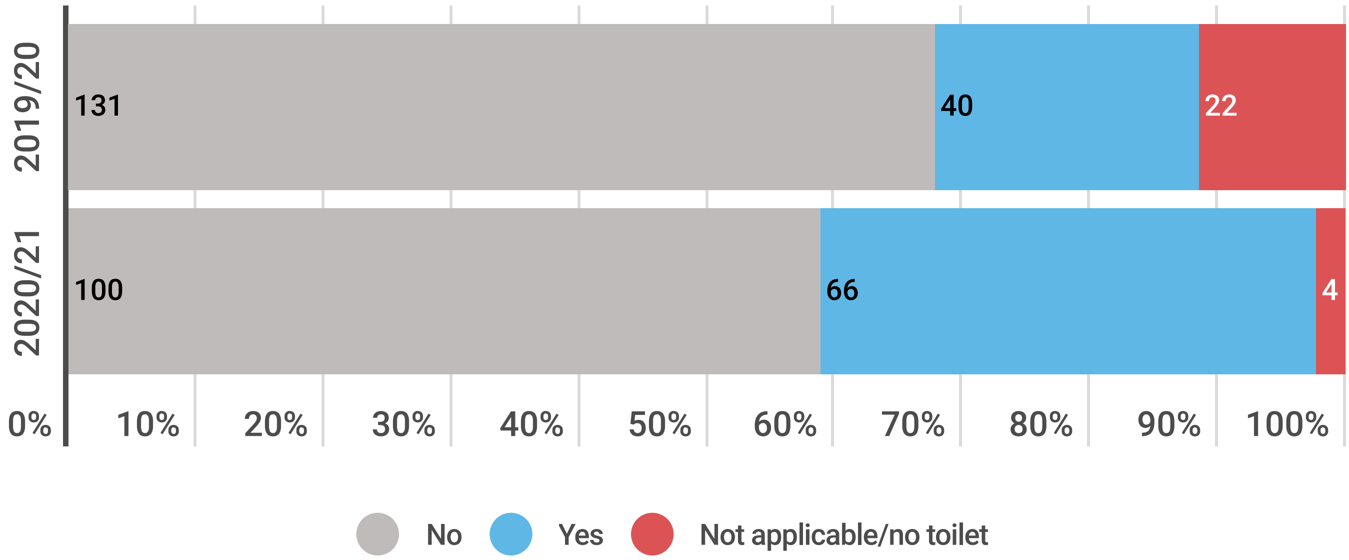
97% of modified vans/people movers had toilet facilities. These vehicles were reported to have a variety of different toilet types suggesting that there may have been some misunderstanding of the different categories of toilet in the survey. In 2019/20, only portable toilets were used in these vehicles.

Built-in toilets and toilets in separate cubicles were located in a variety of vehicles, again suggesting some misunderstanding of the different categories of toilet. 87% of toilets in purpose built campervans, caravans, motorhomes and house buses were either built in or toilets in a separate cubicle.

The number of respondents that reported not having any toilet facilities at all in their vehicle fell from 13% in 2019/20 to 2% in 2020/21.

The toilet facility type results are not as clear cut as 2019/20.

Have you used your own toilet facilities on this trip?



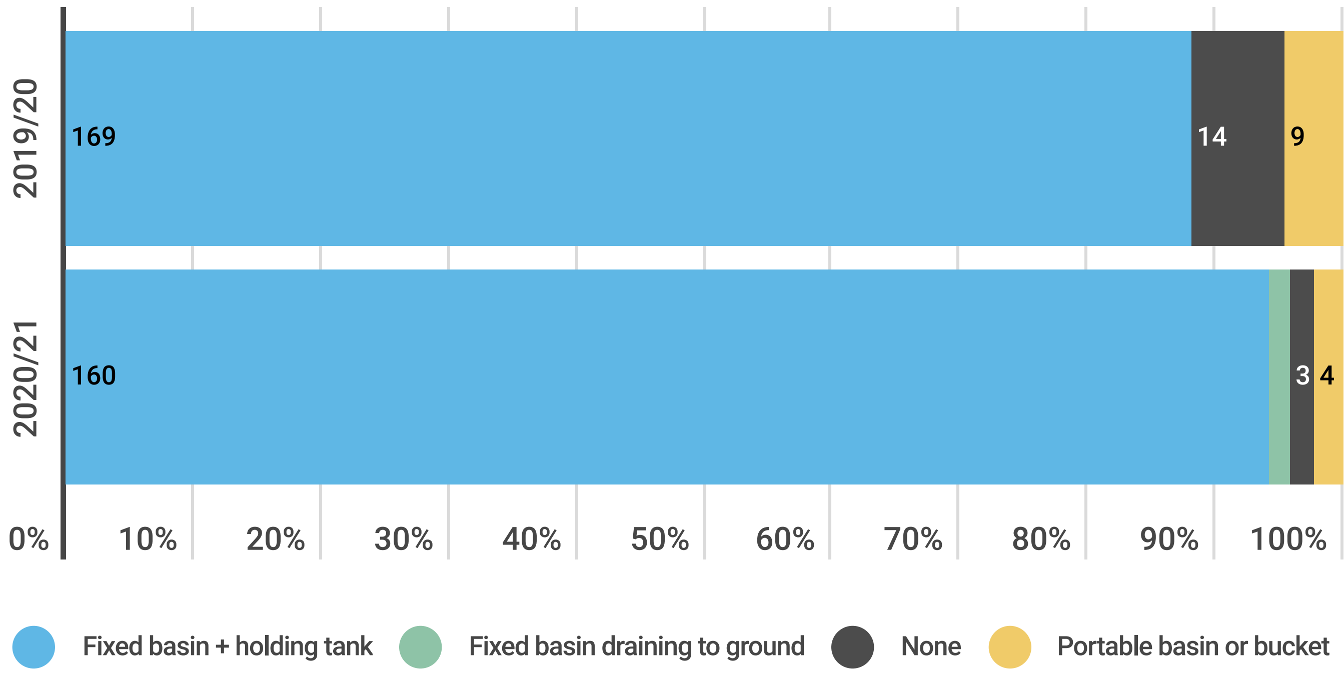
Insights

Of the 97% of respondents that reported having toilet facilities in their vehicles, 39% had been used on their trip. This is a significant increase from the 21% that reported having used their toilets in 2019/20. This may be related to the reduction of rental vehicles where renters forfeit their toilet deposit if they return the vehicle having used the toilet. It may also be related to the change in balance between camper profiles.

The least likely toilet facilities to have been used were portable toilets stored in the vehicle with all those reporting that they didn't use their toilet having this type of toilet. The most likely to be used were built in toilets or toilets in separate cubicles with all respondents with this type of toilet having used it on their trip.

Portable toilets stored in vehicles were the most common (79%) type of toilet facility across all vehicle types. However, they were the least used, with only 26% of respondents with a portable toilet facility having used it on their trip.

What dishwashing facilities have you brought with you?



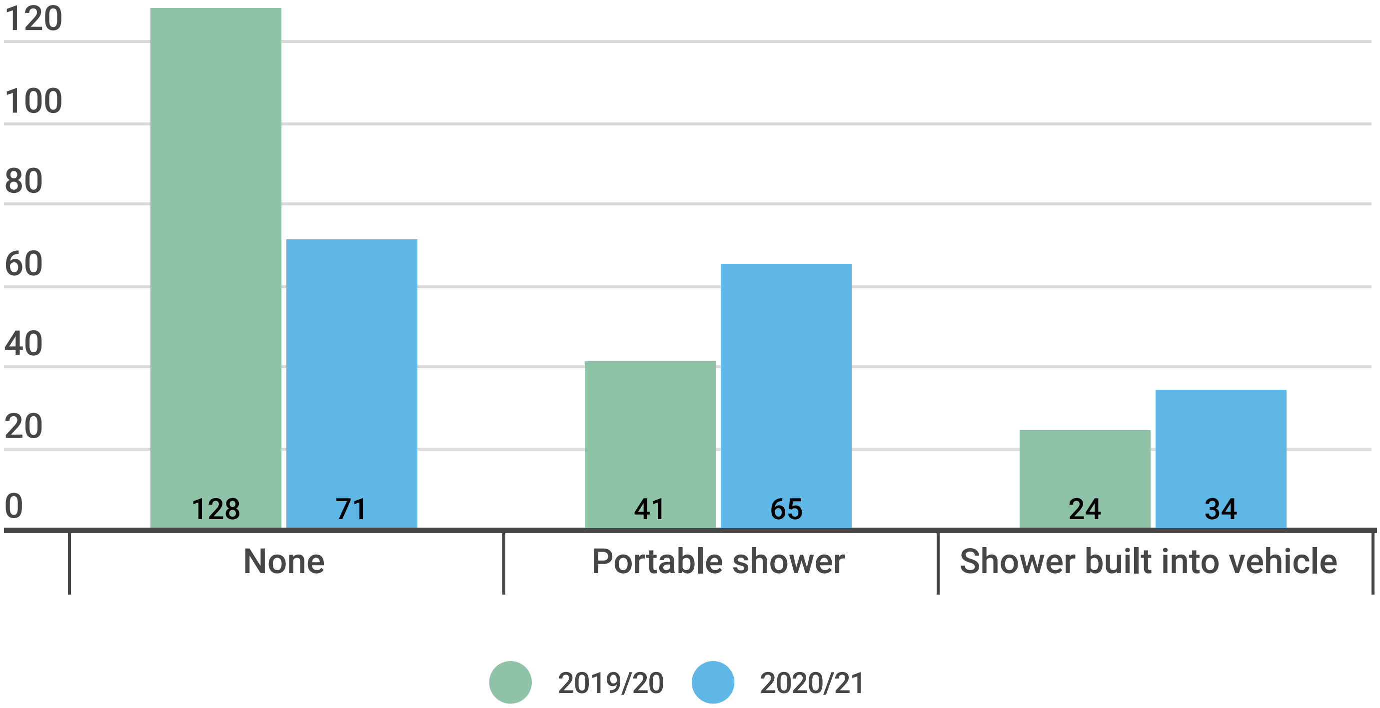
Insights

94% of respondents had dishwashing facilities with waste water draining to a holding tank, up from 88% in 2019/20. This included 93% of modified vans/people movers and 100% of purpose built campervans, caravans, motorhomes, or house buses.

A small number of respondents (4) used a portable basin or bucket (tip water out) with all of these located in privately owned modified vans/people movers. Three respondents, who all travelled in modified van/people mover, utilised a fixed basin with water draining onto the ground. The 3 respondents that did not have any dishwashing facilities were all in modified vans/people movers and all travelling for more than 6 months.

In 2019/20, most (10 of 12) car/SUV/utility/station wagons did not have dishwashing facilities. However in 2020/21 the car/SUV/Utility/station wagon category all reported having dishwashing facilities draining to a holding tank. This suggests either a significant improvement in these vehicles or a misunderstanding of vehicle types. These vehicles all reported having built in toilets as well which is unexpected so these results may be suspect.

What shower facilities do you have?



Insights

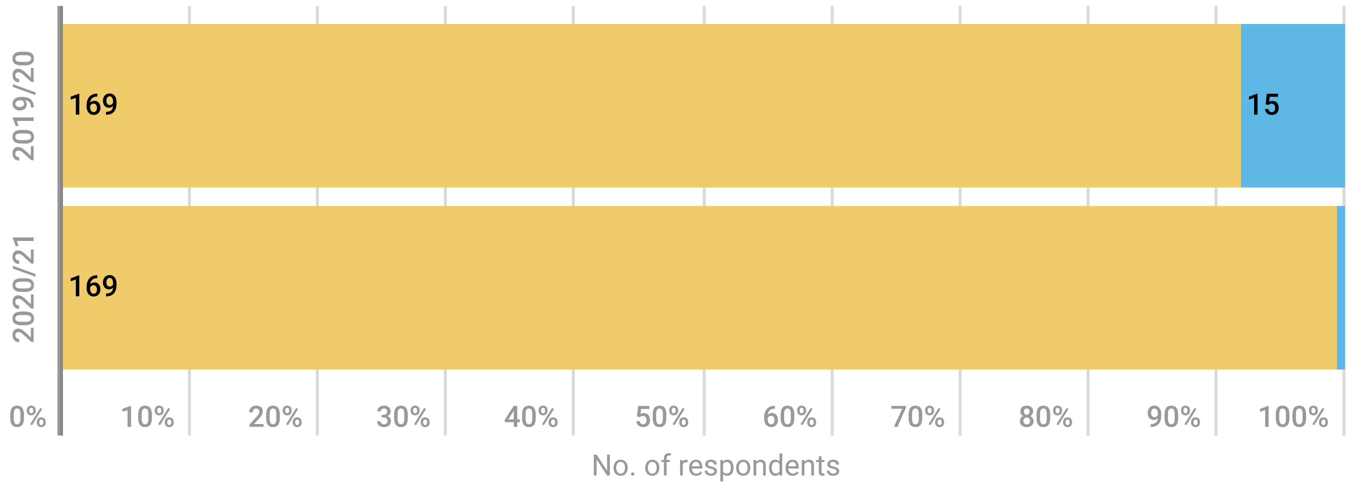
The number of respondents with no shower facilities fell from 66% in 2019/20 to 42% in 2020/21. Most of the increase in showers was in portable showers with a slightly smaller increase in showers built into vehicles.

58% of respondents in 2020/21 had either portable showers or showers built in to their vehicle. Shower facilities, although having increased are still the least common camping facility (of shower/toilet/ dishwashing) in respondents' vehicles.

Of those respondents who had shower facilities, portable showers were the most common with the majority (98%) carried in modified vans and people movers.

Results for built in showers show that they were built into all vehicle types including car/SUV/Utility/Station wagon. This is an unexpected result and suggests some misunderstanding of the question.

Does your vehicle have a current self-containment certificate?



Yes No

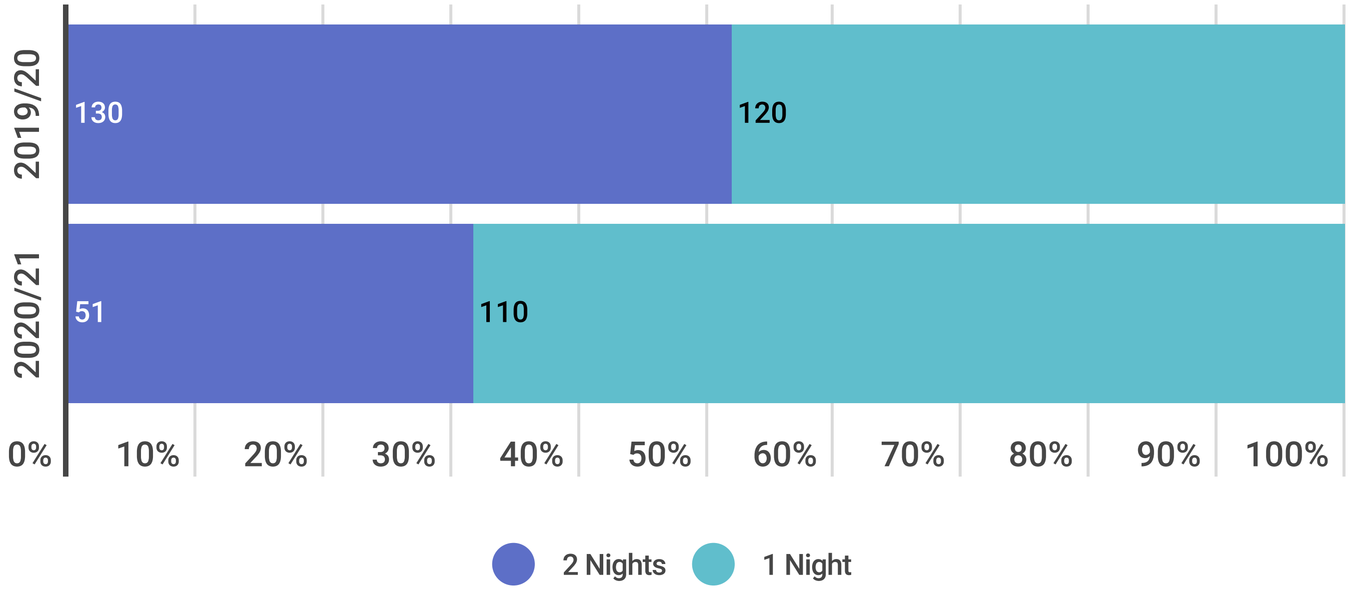
Insights

In 2020/21 99% of respondents vehicles had current self-containment certificates up from 88% in 2019/20. Given that only one respondent reported not having a current self-containment certificate, there were no correlations with vehicle or respondent type that would be meaningful.

The criteria for issuing of self-containment certificates
1. Fresh water tanks: 4 litres per person per day (12 litres per person minimum); e.g. 24 litres are required for 2 people in a 3-day period.
2. Sink: Via a smell trap/water trap connected to a water tight sealed waste water tank.
3. Grey waste water tank: Waste water tank should hold at least 4 litres of water per person per day, if the tank holds less then it should be vented and monitored.
4. Evacuation hose: At least 3 metres for fitted tanks or long enough to connect to a sealed portable tank.
5. Rubbish bin: Sealable rubbish container with a lid.
6. Toilet (portable or fixed): Minimum capacity 1 litre per person per day (3 litre net holding tank capacity per person minimum)
A portable toilet must be adequately restrained or secured when travelling. The portable toilet shall be usable within the motor caravan or caravan, including sufficient head and elbow room whenever required, even with the bed made up.

69% of respondents with toilets reported that they did not use them. Also sinks were often too small to be useful.

How many nights will you stay at this site (including nights already spent here)?



Insights

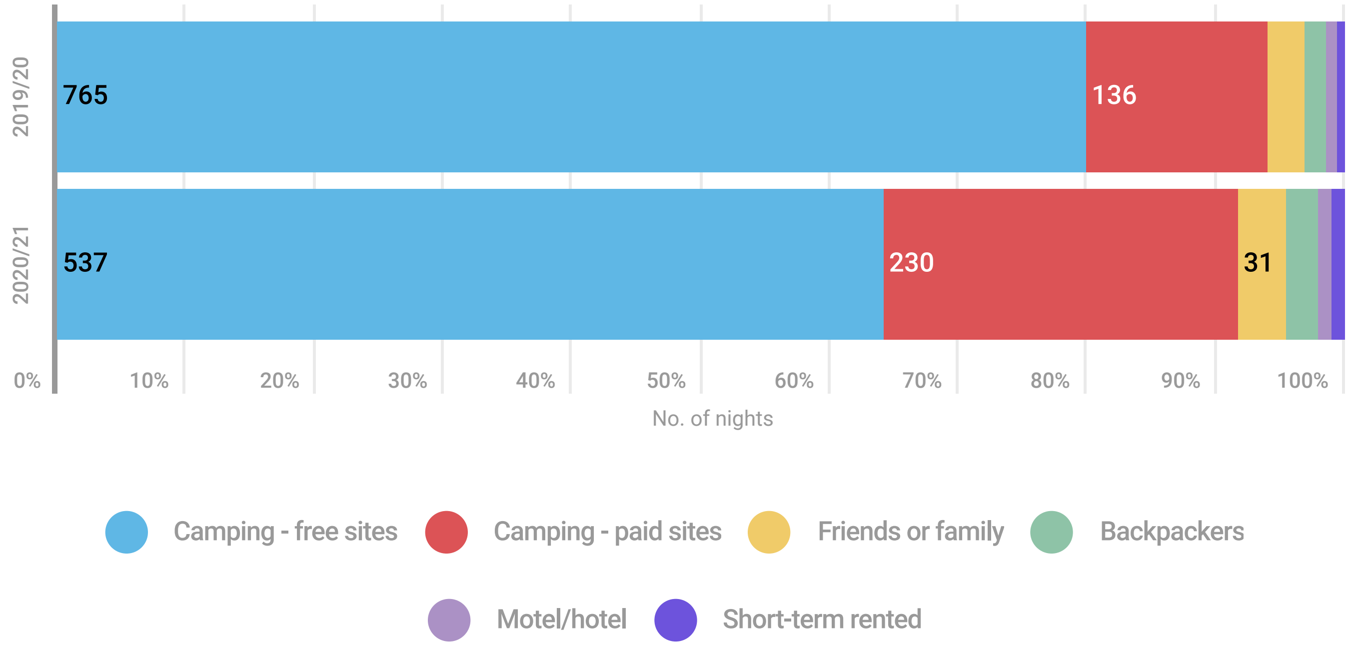
Fewer (32%) respondents intended to stay two consecutive nights at the same location, down from 52% in 2019/20. The remaining 68% (up from 48% in 2019/20) intended to stay one night. Respondents tend to be staying for shorter periods overall than they were a year ago.

Three respondents reported longer stays at the same site. However as the limit is two nights these have not been included in analysis.

Respondents that were living (not working) in Nelson, older New Zealanders, and Working Holiday Tourers were more likely to stay two or more nights than other camper profiles. Most other campers tended to stay for one night only.

Respondents at QEII Drive Gardens Car Park, Trafalgar Park (Kinzett Terrace Car Park), and Wakapuaka Reserve are slightly more likely to stay for 2 nights than respondents at other locations.

Over the last five nights, how many nights have you stayed in the following types of accommodation?



Insights

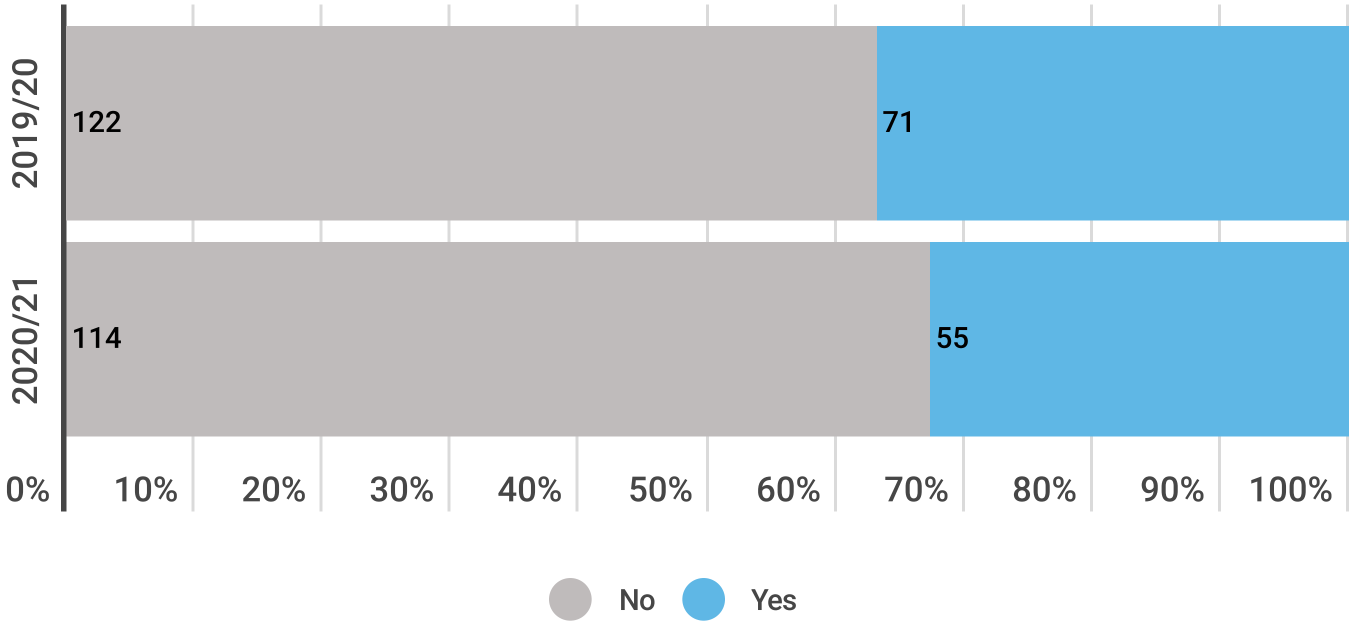
64% of total nights over the five days prior to the survey were spent in free camping sites, down from 80% in 2019/20. Overall, 43% of respondents spent the last five nights at free campsites. The decrease in use of free sites is balanced by an increase in use of paid camp sites from 14% to 27% of total nights over a five day period.

Of all paid accommodation types, paid camping sites were significantly more popular than others. New Zealand respondents were more likely to use paid campsites with 63% of them using paid campsites at least once in the previous five nights compared with 37% of international visitors. New Zealanders spent an average 38% of nights at paid campsites. 11% of overall respondents spent the last 5 nights at paid campsites.

Over a total of 855 nights, only 38 nights (4.4%) were spent in other forms of paid accommodation such as backpackers, hotels/motels and short-term rented accommodation (eg Air BnB/holiday houses). Similarly only 31 nights (3.6%) were spent with friends or family.

Backpacker accommodation was more likely to be used by solo Working Holiday Tourers. Motel/hotel accomodation was more likely to be used by Local Campers, and short term rented accommodation by Working Holiday Tourers. In all cases, the sample size of people using these options is s small as most respondents used free or paid campsites the majority of the time.

Do you have a total budget for your trip to New Zealand?

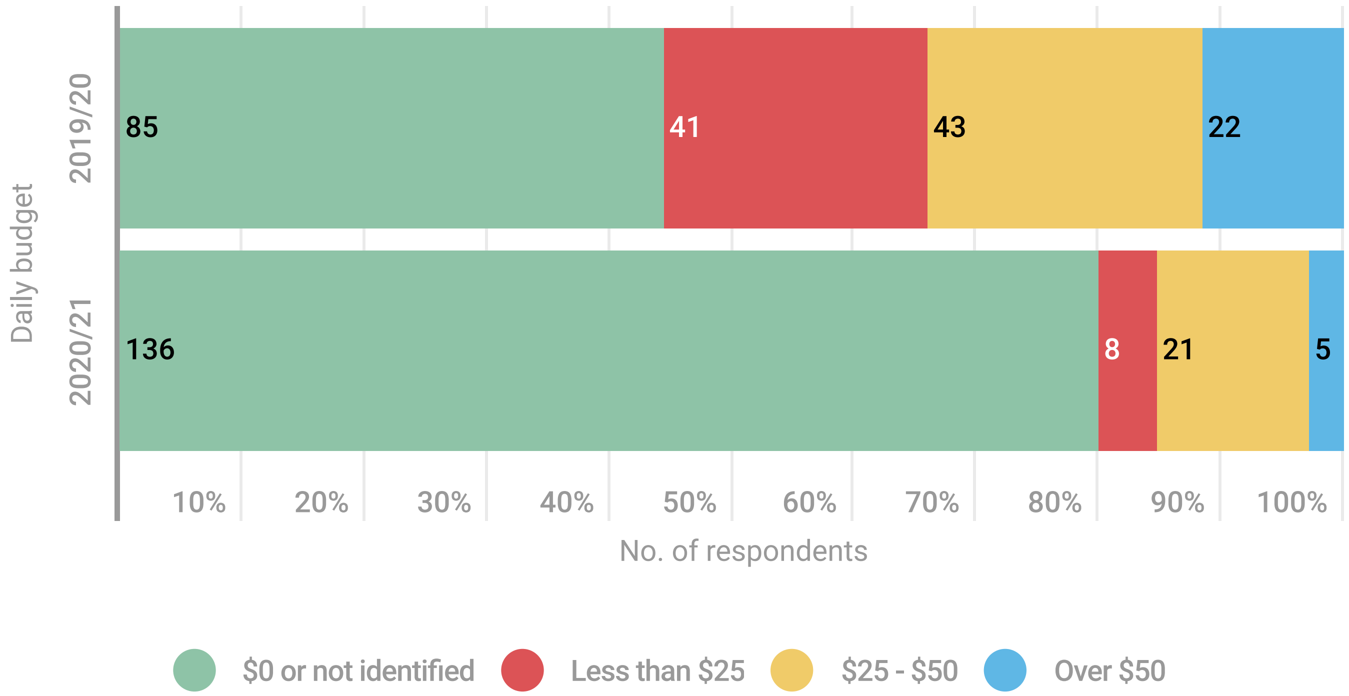


Insights

33% of all respondents indicated they had a total budget for their trip, down from 38% in 2019/20. Of those, 62% identified what their total budget was compared with 27% in 2019/20.

Younger international visitors (under 30 years old) were significantly more likely than older visitors to have a total budget for their trip. This was reflected by 46% of 20-29 year olds having a total budget compared to 16% of respondents over 30 years old having a total budget. Younger respondents were also slightly more likely (65%) to disclose what the budget is than older respondents (50%). The researcher conducting interviews noted that there was quite a bit of respondent resistance to answering the budget questions and disclosing budgets.

What is your daily budget per person for everyday expenses such as food and fuel but excluding events and activities?



Insights

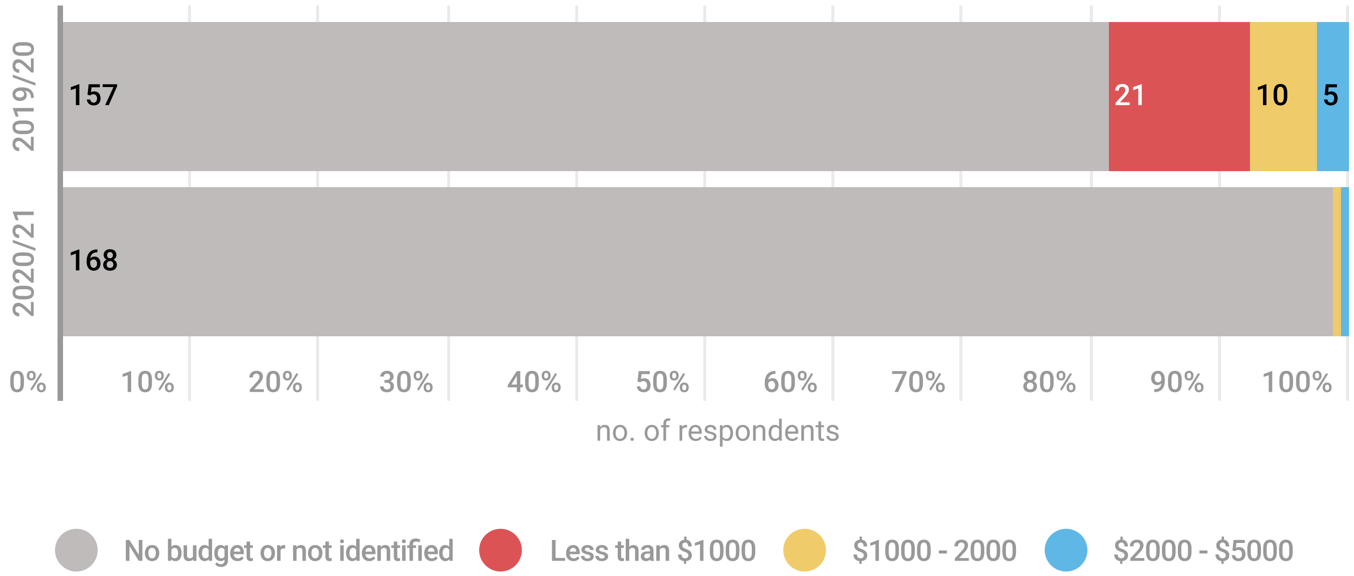
Only 20% of respondents in 2020/21 identified a budget for everyday expenses, down from 56% in 2019/20. Amongst those 20%, the median daily budget across all respondents was $40, up from $25 per person in 2019/20.

For those that did identify a budget, most were in the $25 to $50 range with few over $50 per day. The numbers of respondents that planned to spend less than $25 or more than $50 had fallen since 2019/20.

Due to the small numbers that identified a daily budget and the change in camper profiles since 2019/20, there was no clear correlation between daily budget for everyday expenses and camper profiles.

The lowest daily budget reported was $15 and the highest $250.

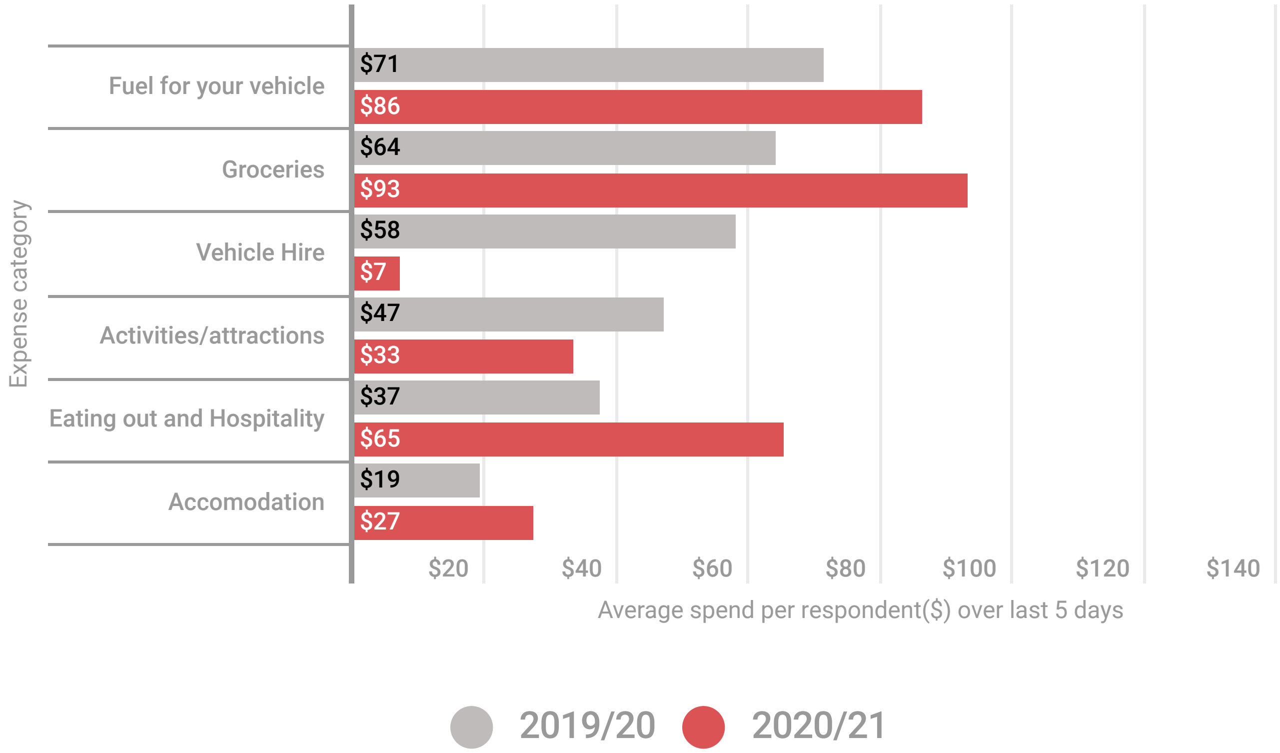
What is your budget per person while travelling in New Zealand for events, activities and experiences?



Insights

In the 2020/21 survey, 99% of respondents either did not have a budget for events, activities or experiences, or did not disclose it. Only two respondents provided a budget amount for this question. It is not possible to draw any conclusions from this information.

How much have you spent per person in the last 5 days on the following:



Insights

Vehicle Hire

There were only three rented vehicles in 2020/21 with an average spend per person per vehicle over 5 days of $416 for a rental period of 1 to 2 weeks. The sample size is very small so may not be representative of rental spending, and is not representative of overall spending on this category ($7.35 per respondent).

Services (eg vehicle repair, InterIsland ferry etc)

16% of respondents reported spending between $5 and $2,000 on services eg vehicle repairs, Inter-island ferry, haircuts etc over the previous five days with a median spend of $200. Spending on this category was very variable and not correlated with any camper profile. 71% of respondents that reported any spend on services were travelling for more than 6 months.

Groceries

The spending on groceries was slightly higher than in 2019/21 with a median spend of $100 over 5 days, and an average spend of $93. Working Holiday Tourers had the lowest average spend on groceries of $77, while Short Stay Holiday makers had the highest average spend of $129.

Activities/Attractions (eg bungy jumping, jet boating, tours etc.)
78% of respondents did not report spending anything on activities/attractions (e.g. bungy jumping, Jet Boating, tours etc) over the five days prior to being surveyed. For the 22% of respondents who did spend on activities and attractions the median spend was $120 with spending ranging between $10 and $1,000.

Long term visitors generally spend much less in this category, with respondents travelling for less than 6 months averaging $281 over 5 days compared with $117 for respondents staying over 6 months.

Fuel for your vehicle
Median spend on fuel across all respondents was $75 for the five days prior to the survey, with an average spend of $86. The biggest spenders on fuel were Short Stay Holiday Makers who spent an average of $133 on fuel over 5 days.

The lowest spenders on fuel were Long Term International Visitors (average of $74 over 5 days) and Short term International Visitors ($81 average).

Accommodation/camping sites (excluding campervan hire), hotels, motels
The average spend on accommodation across all respondents of $27 was significantly lower than other expenses except activities and attractions. Amongst the respondents that did pay for accommodation, the median spend was $60.

In the five days prior to being surveyed only 43% of all respondents had paid for accommodation with 47% of those spending on average less than $10 per day.

The two largest total spends were both $200 or over, and were reported by International local campers who were working in the region, and who stayed five nights in either paid camp sites or a hotel/motel. The lowest spends were generally between $6 - $10 for paid camping sites.

The majority of paid accommodation was for paid camp sites with only 22% of respondents that paid for accomodation using any other forms of paid accommodation.

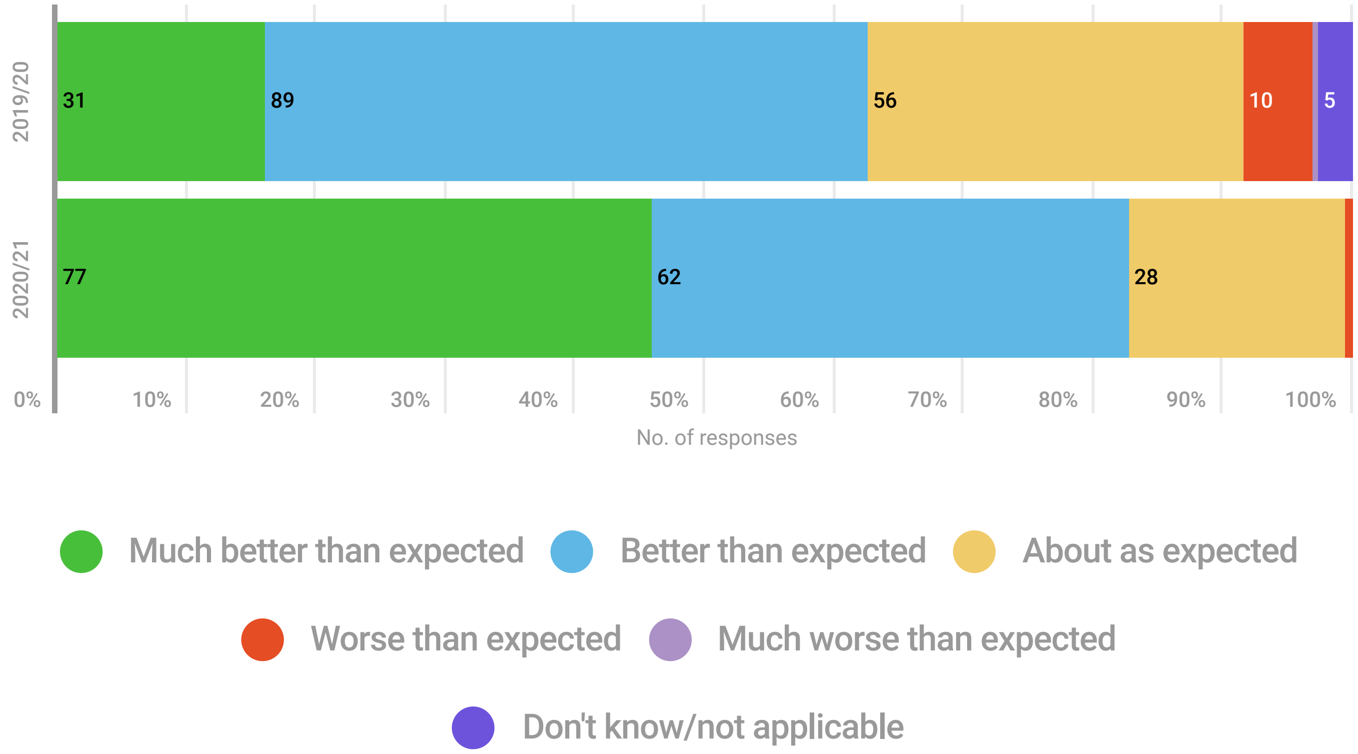
Eating out and Hospitality (cafes, restaurants, bars)
Spending on eating out and hospitality has increased since 2019/20. At that time 25% of respondents didn't spend at all on this category but that has dropped to 19% in 2020/21, with the remaining 81% spending an average of $80 over 5 days. The median spend amongst the group that did spend in this category was $65.

Working Holiday Tourers had one of the lowest average spends at $48 over 5 days followed by Short term International Visitors at $53, and Domestic Holiday Makers at $66. Of the 80 respondents that spent $50 or less over 5 days, 24 or 30% were Working Holiday Tourers, and 17 or 21% were Long Term International Visitors.

Short Stay Holiday Makers had the highest average spend for this expense ($169). Of the 26 respondents that spent more than $100 over 5 days, 8 or 31% were Short Stay Holiday Makers.

The spending patterns for the camper profiles were quite different to 2019/20 when Short Stay Holiday Makers and Local Campers had the lowest median spend and Short Term International Visitors and Working Holiday Tourers had the highest median spend. This is likely to have something to do with Covid-19 and International visitors that are still in the country being in a more precarious financial position than they were a year ago.

How would you rate your overall experience of camping in New Zealand?



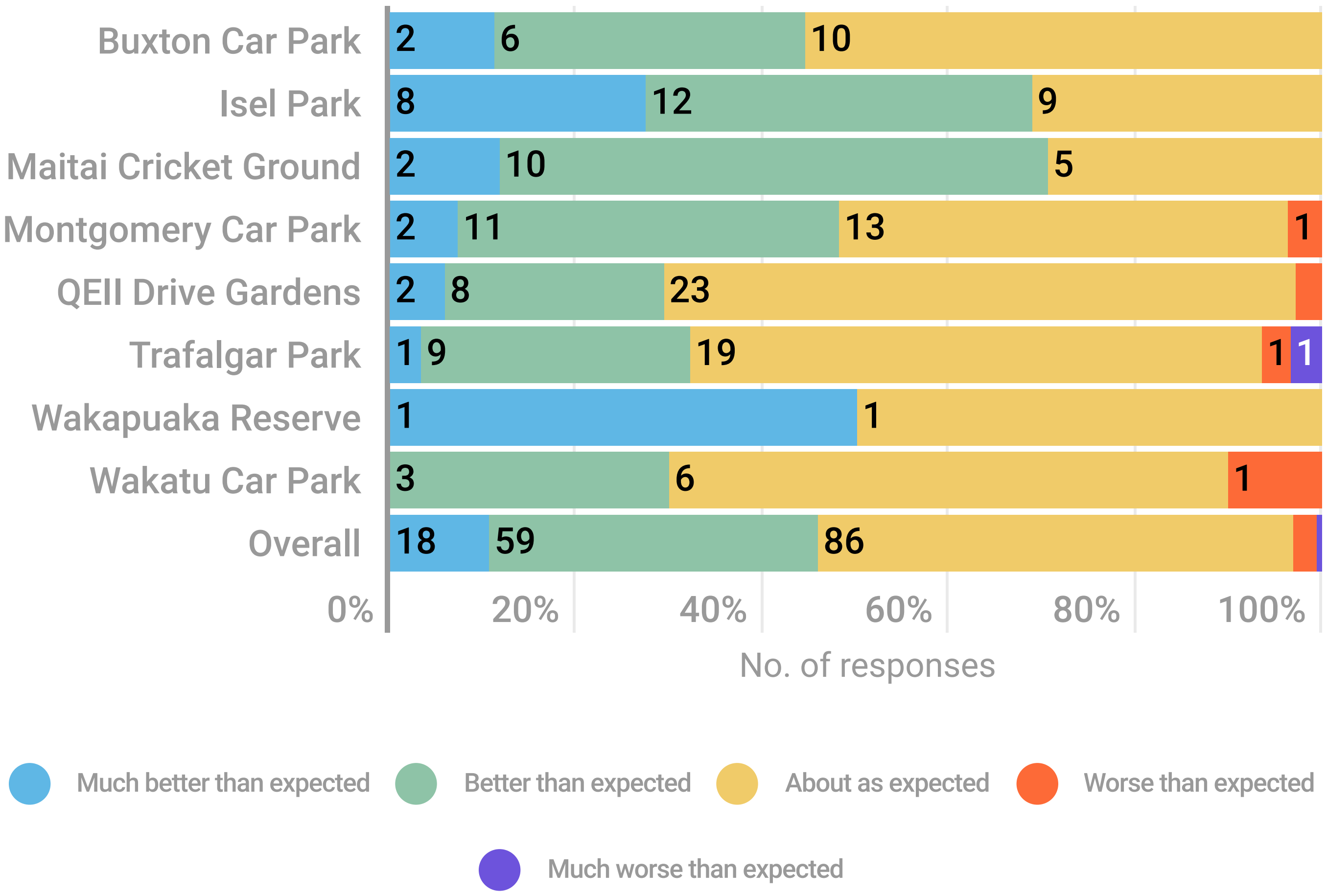
Insights

The overall camping experience in New Zealand was rated more highly than in 2019/20 with 99% of responses confirming their experience had been as expected or better, up from 92% in 2019/20. 46% rated their experience as much better than expected compared with only 16% in 2019/20. Only 1 respondent rated it worse than expected.

Of those that rated their camping experiences in New Zealand as much better than expected, the largest group (32%) were Working Holiday Tourers, and 71% were international visitors.

Of those who rated their camping experience as about as expected over a quarter (64%) were New Zealanders. The only respondent to rate it as worse than expected was also from New Zealand. No respondents answered this question with “Don’t know/ not applicable”.

How would you rate your experience of camping in this location?



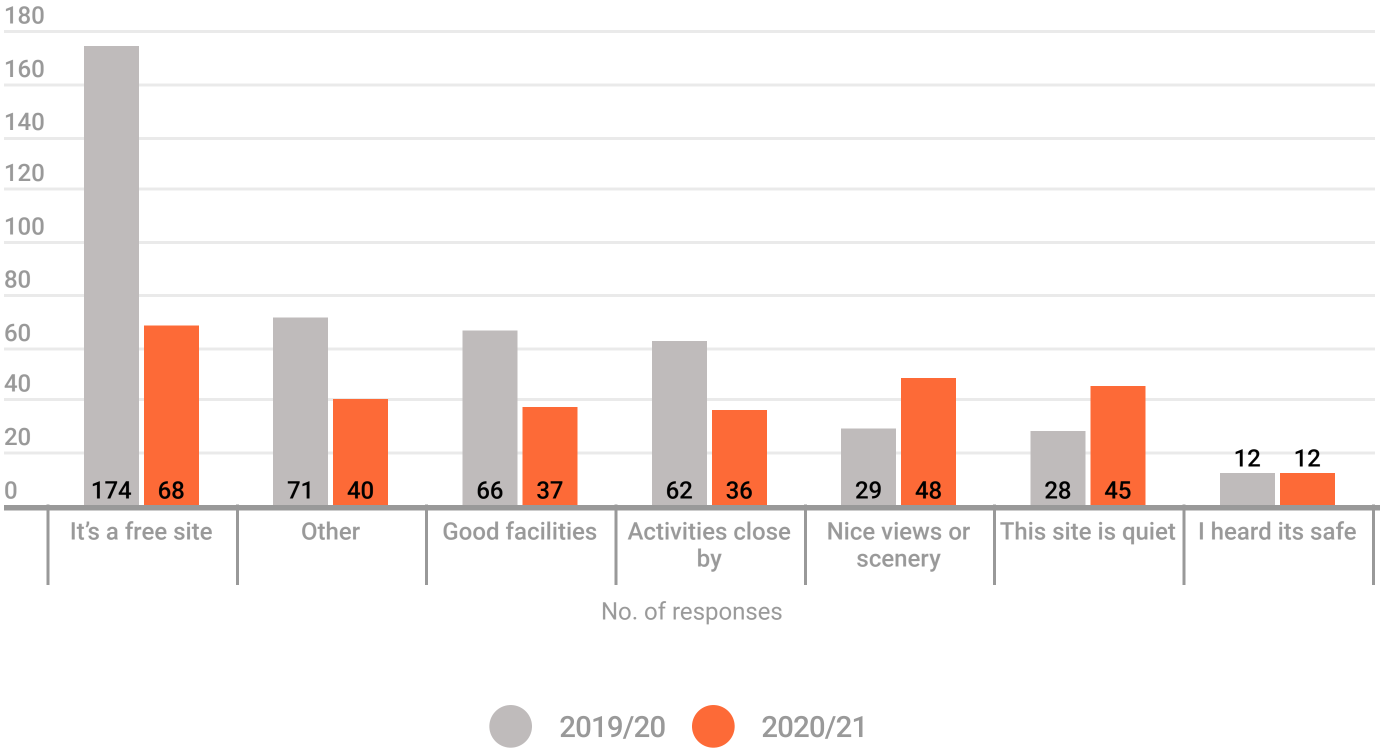
Insights

When respondents were asked to rate their experience at the camping location in which they were surveyed, 51% felt the site was as they expected, 35% felt it was better than expected, and 11% felt it was much better than expected. Isel Park and Maitai Cricket Ground generally performed better than the average results, with 28% of respondents at Isel Park rating the camping area as much better than expected. Wakatu Car Park and Trafalgar Park received the worst ratings of the eight camping sites.

Overall only 2.4% of all ratings were worse than expected and only one respondent rated their experiences as much worse than expected.

Of the 77 respondents that rated their camping location as better or much better than expected, 52 (68%) were international travellers, and 27 (35%) were Working Holiday Tourers.

What attracted you to this site?



Insights

The most common reason campers were attracted to a the site in which they were staying was because it was free. However, the percentage of respondents who gave this reason has fallen from 90% in 2019/20 to 40% in 2020/21. Other attractions that are less selected are good facilities, activities close by and "other". Nice views and scenery, and quiet site were mentioned by more respondents than in 2019/20.

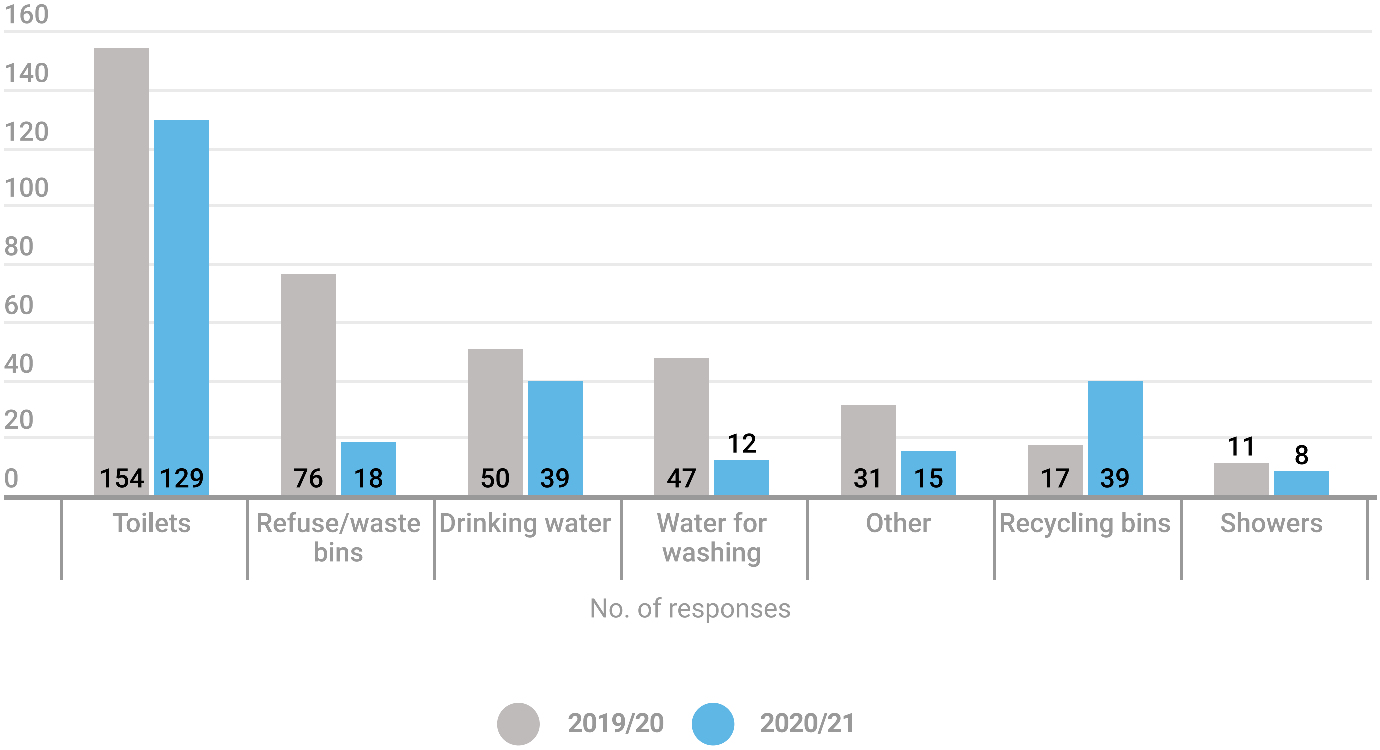
24% of respondents cited 'other' reasons that attracted them to the site. The most common of these were the convenient location close to the central city and good wifi availability. These comments.

Although 99% of respondents claimed to be self-contained, good facilities were an attraction to 22% of all respondents. Montgomery Car Park was the location for 59% of "good facilities" responses. Good facilities included wifi, picnic tables, laundry facilities and showers, many of which respondents could not provide for themselves.

Only 7% of respondents were attracted to a site because of its perceived safe location.

Female campers travelling alone or with friends were more likely to value sites perceived as quiet.

What facilities and services do you expect to have available at free sites?



Insights

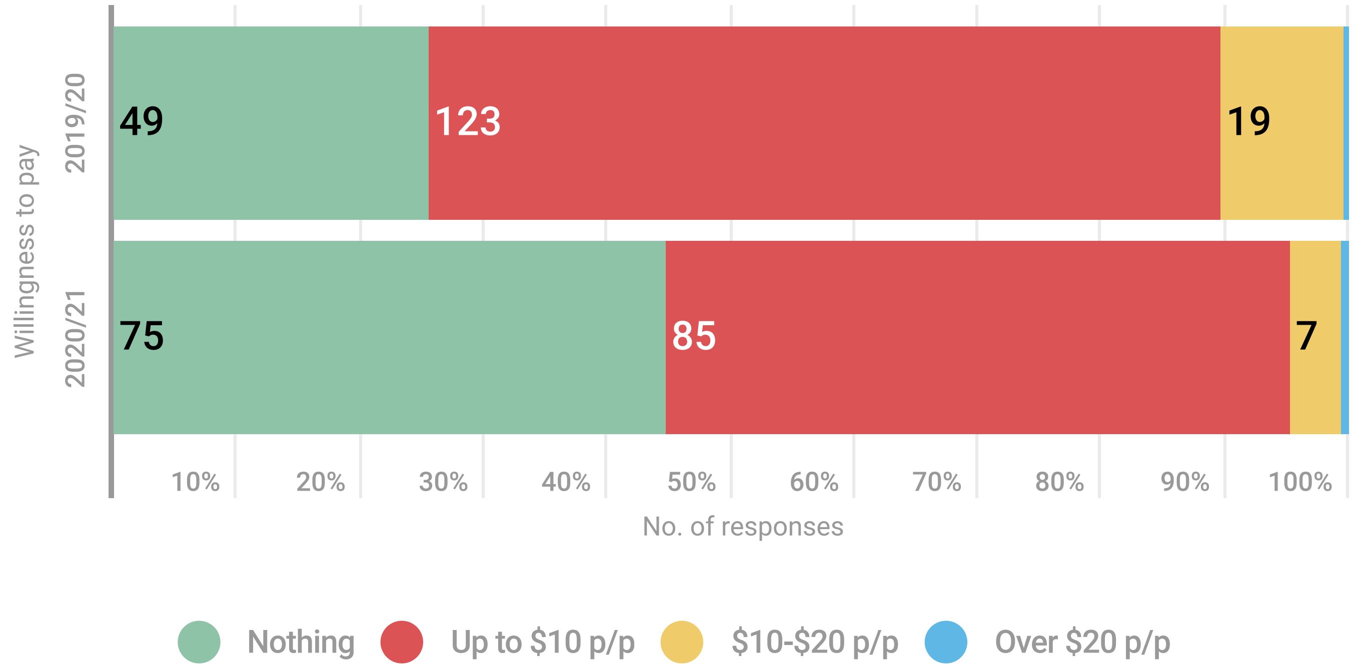
Respondents were asked to identify their expectations of a camp site that they are not expected to pay for. 76% of respondents expected toilet facilities to be provided at free camping sites (down slightly from 80% in 2019/20). Of those who did not expect toilet facilities, 73% were actually using their own toilet facilities compared with 39% overall.

Waste bins were less commonly expected at free sites than last summer, but the expectation of recycling bins had increased to 23% of respondents. The same proportion of respondents also expect drinking water at free camp sites. The majority of these were long term international visitors (over 6 months) and Short Stay Holiday Makers.

Although 42% of respondents reported having no shower facilities in their vehicle, only 5% of campers expected shower facilities to be provided at free sites.

9% of respondents expected some other facilities to be provided at free camping sites. The most common of these were level ground, plenty of space with room to park, picnic tables and wifi.

What do you think would be a fair price to pay per night to have basic facilities provided at freedom camping sites eg toilets, running water, drinking water, and refuse/recycling bins?



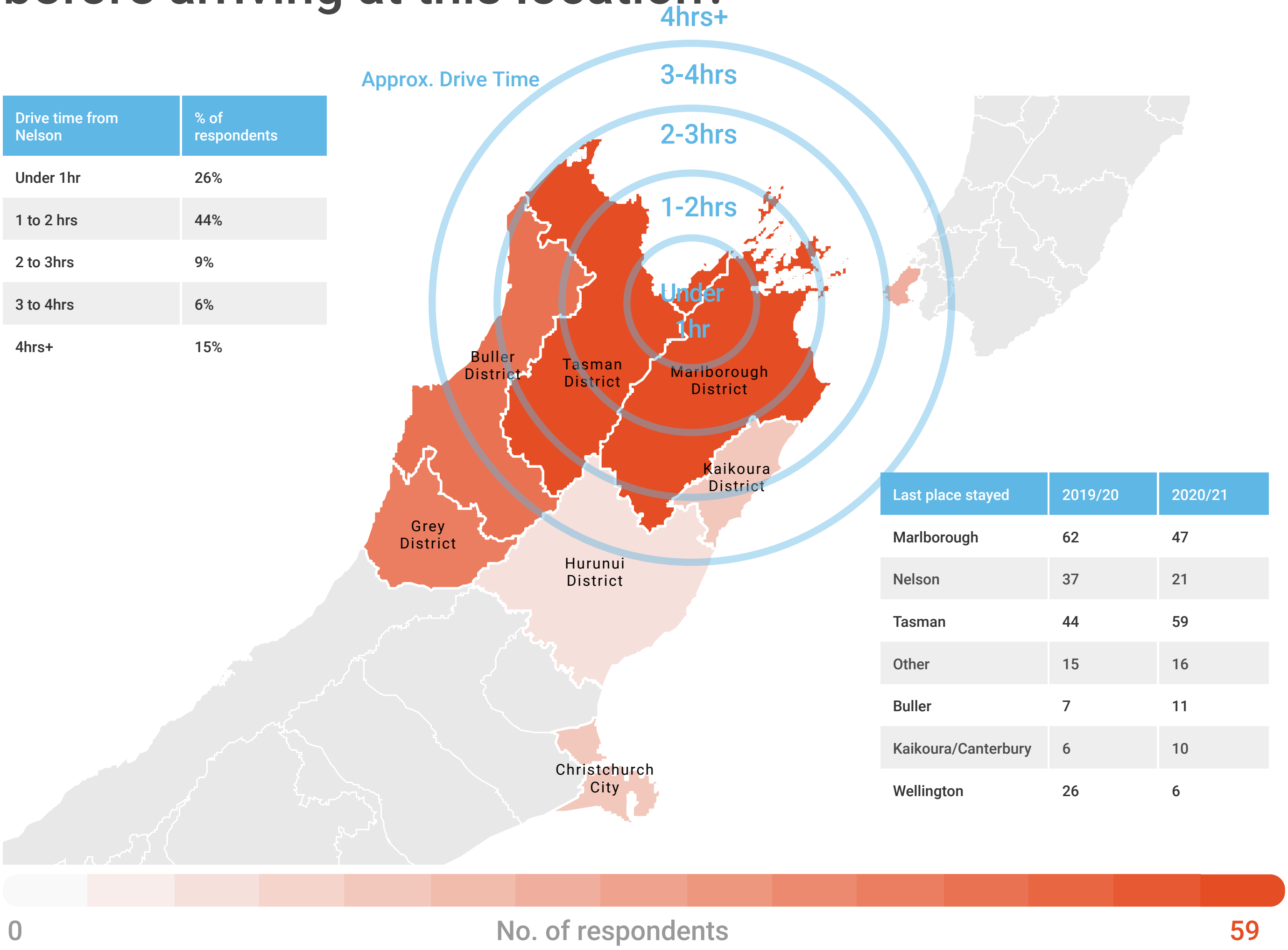
Insights

55% of respondents indicated they would be willing to pay for basic facilities to be provided at freedom camping sites, down from 74% in 2019/20. The majority of respondents (51%) were willing up to $10 per night (down from 64% in 2019/20). The only respondent who was willing to pay more than $20 per person per night was a long term solo camper in the Local Camper category who also found his camping area much worse than expected.

45% of all respondents (up from 26% in 2019/20) weren't prepared to pay anything for basic facilities at freedom camping sites. The majority of these were Working Holiday Tourers (27%), Local Campers (19%), Long term International visitors (17%), and Short Stay Holiday makers (16%).

Where was the last place you stayed (at or near) before arriving at this location?

Drive time from Nelson	% of respondents
Under 1hr	26%
1 to 2 hrs	44%
2 to 3hrs	9%
3 to 4hrs	6%
4hrs+	15%



Last place stayed	2019/20	2020/21
Marlborough	62	47
Nelson	37	21
Tasman	44	59
Other	15	16
Buller	7	11
Kaikoura/Canterbury	6	10
Wellington	26	6

Insights

80 respondents (47%) came to the Nelson camping sites from somewhere in the Nelson-Tasman Districts, with a further 28% of respondents travelling from the Marlborough District. Just over a quarter of respondents (45) travelled less than an hour, with 21 of these coming from within a 30 minute drive of Nelson city centre. Motueka was the most common location within the Nelson-Tasman districts that was more than 30 minutes from Nelson's city centre, with 16 of the 45 respondents that travelled less than an hour coming from Motueka.

74 respondents (44%) travelled one to two hours before arriving in Nelson City, with just over half of these (55%) coming from the Marlborough District, mostly, Blenheim, Picton and Havelock. The remaining 45% came from elsewhere in the Tasman District.

70% of all respondents previously stayed at a location within two hours of Nelson city centre. This is very similar to the 2019/20 results. Of the remaining respondents 15% travelled between 2 and 4 hours and the remaining 15% travelled more than 4 hours. Fewer respondents came direct from Wellington this year (3.5% down from 13.5% in 2019/20), and significantly more from Greymouth (10 compared with 0 in 2019/20).

How did you hear about this camp site?

123
Camping Apps
(72%)

9
Friends/travellers
(5%)

32
Other
(19%)

4
Internet Search
(2.3%)

3
Print
(Brochures/maps)
(1.7%)

Insights

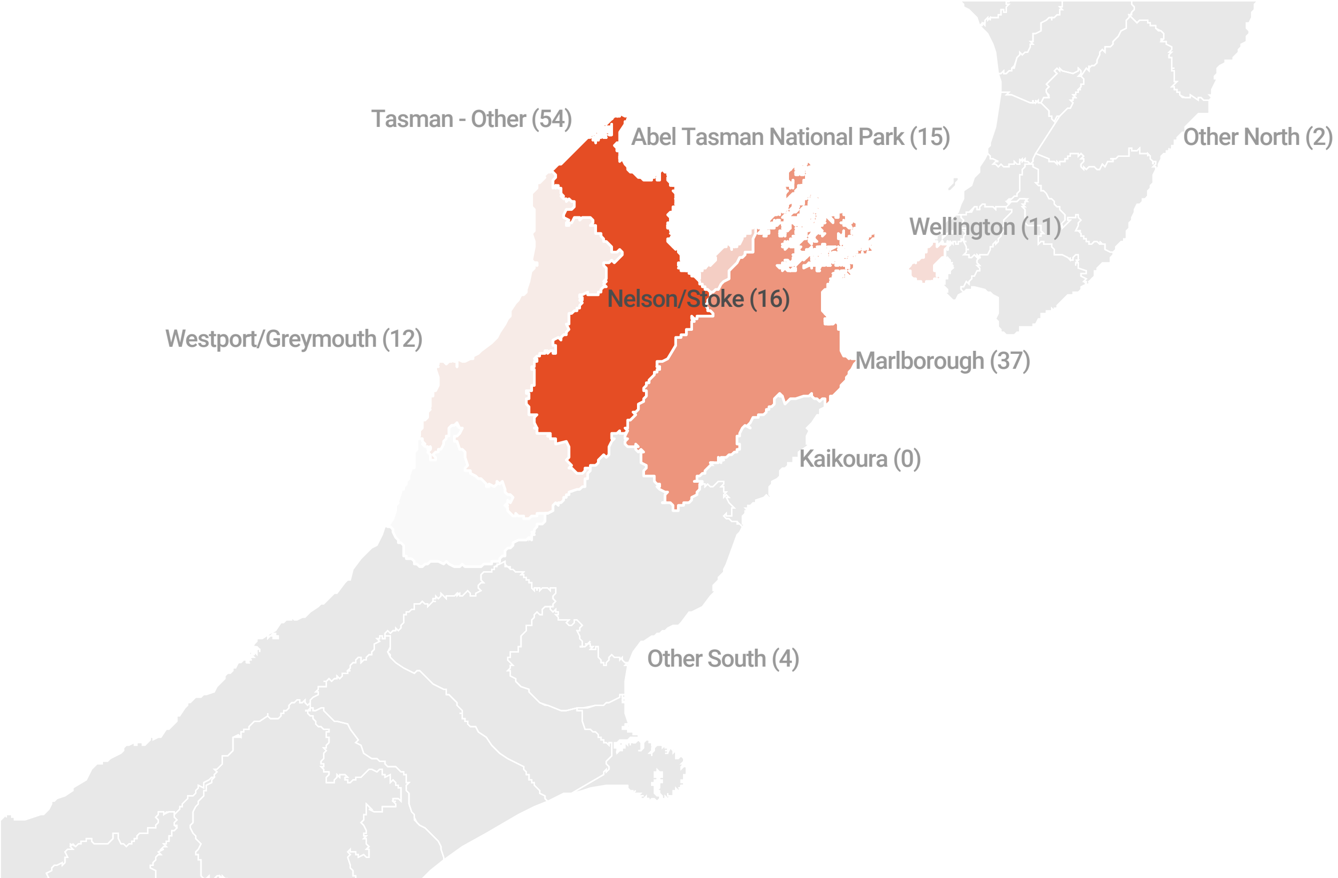
72% (down from 87% in 2019/20) of respondents discovered free camping locations provided by Nelson City Council through camping apps. The CamperMate App was by far the most popular with 72% of those who used camping apps finding the site they were at on CamperMate, compared to 20% on Wikicamps and 6.5% on Rankers. Campers that use apps are generally very well informed about facilities and conditions of use leading to more realistic expectations and fewer compliance issues.

Information from friends and other travellers was used by only 5% of campers to find a campsite.

Printed brochures and internet searches were the least used of the ways listed with only around 2% of respondents using each.

32 respondents reported they found the site they were staying at in ways other than those listed above. Three saw it at the Nelson *i*Site, and most came across it by chance or local knowledge.

Where do you intend to travel to when you leave this location?



Insights

72% of respondents intended their next destination after Nelson to be within a 2 hour drive of Nelson city centre with 50% of respondents intending to stay within the Nelson-Tasman region. The remaining 22% plan to travel to the Marlborough District.

Sixteen respondents intended staying in Nelson and Stoke, with 62.5% of this group being Local Campers.

In 2019/20 the most common destination after staying in Nelson was Abel Tasman National Park, with 30% of all respondents intending to travel there. This has changed and Takaka/Golden Bay is now the most popular destination with 24 respondents, followed by Motueka (16), Blenheim (16) and Abel Tasman National Park (15).

9.4% (16) of respondents were unsure of their next destination after Nelson.

Appendix A: Survey Questions

The following questions are about you and where you are from. For all questions in this survey, please respond for yourself and not others in your group.

What is your country of origin - where are you from?

What best describes your age group?
Under 20
20 to 29
30 to 39
40 to 49
50 to 59
60 to 69
70 or older
Prefer not to to say

How many people (including yourself and any children) are you travelling and camping with
What best describes the group of people you are camping with?
Solo camper
Couple without children
Family with children
Extended family group
Friends
Couple plus friends
Other

How long is your trip within New Zealand? How long are you travelling for in total
Less than 1 week
1 to 2 weeks
2 weeks to one month
1 to 3 months
3 to 6 months
Longer than 6 months

Now we'd like to learn more about how you are getting around and the way you are camping during this trip.

What is the purpose of your trip?
Travelling (not working) throughout New Zealand
Travelling (not working) mainly in this region
Working in this region
Working holiday working in other regions
Living (not working) in this region
Other

How are you travelling between camp site?
Rented vehicle
Personal vehicle (privately owned)
Borrowed vehicle
Cycling
Other

What are you camping or sleeping in?
Car/SUV/Utility/Station wagon
Modified van/people mover
Purpose built campervan, caravan, motorhome, or house bus
Tent
Other

What toilet facilities have you brought with you?
None
Portable toilet stored in vehicle
Toilet in a separate cubicle
Built in toilet in the vehicle

Have you used your own toilet facilities on this trip?
Yes
No
Not applicable/no toilet facilities

What dishwashing facilities have you brought with you?
None
Portable basin or bucket (tip water out)
Fixed basin in vehicle with wastewater draining onto the ground
Fixed basin in vehicle with wastewater draining to holding tank

What shower facilities do you have?
None
Portable shower
Shower built into vehicle

Does your vehicle have a current self-containment certificate
A19.00
Yes
No
Not applicable (not camping in a vehicle)

How many nights will you stay at this site? (including nights already spent here)

Over the last five nights, how many nights have you stayed in the following types of accommodation?
Camping - free sites
Camping - paid sites
Backpackers
Motel/hotel
Short term rented accommodation e.g. Air BnB/Holiday house/BnB etc
Friends or family
Not travelling (i.e. at home)

We would like to better understand how people budget for their travel in this country and where they spend money along the way.

Do you have a total budget for your trip to New Zealand?
A26.00
Yes
No

What is your daily budget per person for everyday expenses such as food and fuel but excluding events and activities?

What is your budget per person while travelling in New Zealand for activities and experiences?

How much have you spent per person in the last 5 days on the following:
Fuel for your vehicle $
Eating out and hospitality e.g. cafes, restaurants, bars $
Accommodation/camping sites (excluding campervan hire), hotels, motels $
Vehicle hire $
Groceries $
Activities/attractions (e.g. bungy jumping, jet boating, tours etc) $
Services (repairs etc) $

The next questions are about how you are finding your trip so far and how it has lived up to your expectations.

How would you rate your overall experience of camping in New Zealand?
Much better than expected
Better than expected
About as expected
Worse than expected
Much worse than expected
Don't know/not applicable

How would you rate your experience of camping in this location?
Much better than expected
Better than expected
About as expected
Worse than expected
Much worse than expected
Don't know/not applicable

What attracted you to this site?
I heard this is a safe location
Nice views or scenery
Its a free site
This site is quiet
This site has good facilities
Activities close by e.g. swimming, MTB
Other

What facilities and services do you expect to have available at free sites?
Toilets
Drinking water
Running water for washing
Refuse/waste bins
Recycling bins
Showers
Other

What do you think would be a fair price to pay per night to have basic facilities provided at freedom camping sites? e.g. toilets, running water, drinking water, and refuse/recycling bins.
Nothing
Up to $10 per person
$10 to $20 per person
Over $20 per person

Where was the last place you stayed at (or near) before arriving at this location?

Where was the last place you stayed at (or near) before arriving at this location?

If the last place you stayed was not listed, please provided more detail

How did you hear about this camp site?
Social media
Camping apps
Friends or other travellers
Internet search
Printed brochures or maps
Other

If social media, camping app or other, please specify which one?

Where do you intend to travel to when you leave this location?
If the next place you are travelling to is not listed, or you are not sure of your next destination, please provide more detail here: