



Demand for Māori Eco-cultural Tourism

Jude Wilson, Chrys Horn,
Kaylene Sampson, Joanna Doherty,
Susanne Becken and Phil Hart



Landcare Research Science Series No. 31



Manaaki
Whenua
P R E S S

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Contents

1.	Introduction and Objectives	7
2.	Literature Review	8
	New Zealand tourism context	8
	Cultural tourism	9
	Māori cultural tourism	12
	Supply-side definitions of Māori cultural tourism products	12
	Demand for Māori cultural tourism	14
	Domestic Māori cultural tourism demand	17
	Summary	18
3.	The Quantitative Survey	19
	Survey research objectives	19
	Methods	20
	Comparison of the two study samples	23
	Differences between domestic and international visitors	32
	'General attraction' items	32
	Tourists' interests in Māori culture	37
	Scenarios in the two case study areas	38
	Drivers for eco-cultural tourism products	42
	Discussion	51
4.	Qualitative Interviews	54
	Objectives	55
	Methods	55
	Participants	57
	Results	58
	General tourism experiences	58
	Māori cultural tourism	60
	Value added to eco-cultural products	64
	Discussion	65
5.	Acknowledgements	67
6.	References	68
7.	Appendices	70
	Appendix 1 Questionnaire	70
	Appendix 2 Scenarios	77
	Appendix 3 Contingency tables for exploring significant relationships between attraction items and scenarios	79

Summary

Project and Client

This research explores the demand for Māori eco-cultural tourism in New Zealand. It contributes to a larger project, *Te Tapoitanga Māori* – ‘Growing regional Māori tourism’, aimed at developing sustainable growth in tourism for Māori and increasing foreign exchange earnings from international tourists.

Objectives

The objectives, in regard to international and domestic tourist behaviour in New Zealand, were to:

- Explore tourists’ consumption of Māori cultural tourism products
- Establish what tourists consider Māori cultural tourism to be
- Determine what value is added to mainstream tourism products by Māori cultural components.

Methods

- The literature relating to cultural tourism in general and in the New Zealand context, particularly Māori tourism products, was reviewed.
- Demand for Māori eco-cultural tourism products was investigated by surveying international and domestic tourists in two case study areas in New Zealand: Northern (East Cape – Te Urewera; $n = 286$) and Southern (Banks Peninsula; $n = 200$). Tourists’ interest in six products scenarios was tested. Three tourism products that might be provided by local Māori were presented for consideration in each area.
- In the north there is a much larger Māori population with more cultural tourism products already offered. The three scenarios were products that matched the profiles of existing tourism businesses: (a) a one-day fishing trip, (b) a two-day guided walk, and (c) a four-day horse trek.
- In the south product-scenarios were more generic because Māori presence on Banks Peninsula is less well known and there is little existing Māori cultural tourism in the area. Scenarios were (a) a one-day guided boat trip, (b) a half-day guided walk, and (c) an evening cultural performance and hangi.
- A qualitative research project then explored in more depth tourists’ consumption and experiences of Māori tourism products. A range of businesses that encompassed ‘Māori in tourism’ and ‘Māori tourism’ products were selected for this qualitative research. They included traditional performances, a hangi, Māori arts and crafts, cultural information and marae visits, Māori-guided experiences and Māori-operated transport or accommodation. Most had some nature component.
- Fifty-three international tourists across the two case study areas were interviewed after they had participated in one of these Māori tourism experiences. We asked them: *What attracts tourists to Māori tourism products? How is Māori culture experienced within those products? Is there a difference between experiences of traditional and contemporary culture? How do tourists value those experiences?*

Results

- Survey respondents in the north tended to be younger, travelling on a lower budget, and staying in cheaper accommodation than those in the south – in part reflecting differences in tourism development in the two case study areas.
- A greater percentage of northern survey respondents (both domestic and international) reported high interest in Māori culture than did those from the southern case study, who generally rated nature-based tourism experiences higher. This could be partly explained by a *regional effect* –

proximity to and/or recent experience of well marketed and promoted regional attractions (e.g. Māori culture in Rotorua) in the north.

- Domestic and international travellers surveyed differed significantly by age group, budget, transport and accommodation used, length of stay in the case study regions, and in the information sources they used. This finding may have been accentuated by the survey timing – peak holiday season for New Zealand families.
- Domestic tourists surveyed in the north were more interested in activities such as mountain biking and hiking. Hiking was also a strong interest with the tourists surveyed in the south along with viewing whales and dolphins and taking a boat cruise. Cultural attractions did not rank very highly with the tourists surveyed in either of the case study areas.
- The qualitative research found that how experiences of Māori culture are mediated for tourists is important. Tourists do not always recognise Māori culture or realise they have participated in a Māori experience. Tourists wish to experience Māori culture in recognisable ways, which often means engaging with the traditional marketed aspects of culture rather than with contemporary culture.
- Māori cultural components appear to add some value (in terms of enjoyment and satisfaction with an experience) although it seems that tourists will not pay more for these aspects of an experience. There is also value added through engagement on a personal level with contemporary Māori culture. Experiences of this nature were more likely to occur through the consumption of small-scale niche products.
- Current marketing does not include the many different aspects of Māori culture in New Zealand. This presents a barrier for operators providing niche products other than the mainstream concert performances and marae visits. To influence what tourists perceive to be Māori culture and how they comprehend it, tourism authorities and individual operators need to increase the profile of the many different cultural elements that visitors can experience. This means broadening the traditional images of Māori culture to highlight a wider variety of elements of the culture. In particular, marketing needs to include more contemporary Māori cultural elements, elements that are not currently obvious to tourists.
- It is beneficial to consider Māori eco-cultural products in the broader New Zealand tourism context, where regional differences exist and are promoted. In the southern study area there is no established Māori cultural tourism market, yet there is potential to capture those international tourists who choose the South Island as their gateway into New Zealand or who never intend visiting the North Island.
- Growth in employment and/or the provision of tourism-related goods and services that may not necessarily have an explicit cultural component may be the most logical path. To this end, the efforts of potential Māori tourism developers in the southern study area may be best expended in ‘eco’ based tourism pursuits (sympathetic to the identified interests of the participants surveyed) in the first instance. The qualitative findings that international tourists only recognise the traditional marketed aspects of Māori culture indicate a challenge for those going down this path.
- There were also significant differences in the perceptions and tastes of domestic and international tourists. It appears that New Zealanders interact with Māori culture with a different set of knowledge, feelings and understandings to international tourists and that the inclusion of Māori culture may actually put New Zealanders off. This raises questions about how New Zealanders form their understanding of and interest in Māori culture. This highlights the need for a similar qualitative exploration of the perspectives and views of *domestic* tourists in relation to Māori culture and Māori cultural tourism.

Conclusions

- The potential for successful Māori cultural product development depends on how Māori tourism is marketed, how it is associated with particular places. In New Zealand, tourists think of Rotorua as the home of Māori and the place they look to participate in traditional Māori tourism products such as a hangi and concert.
- Tourists often do not recognise Māori cultural products which are not these traditional forms.
- Personal interests and circumstances will dictate how tourists choose to consume culture in the countries they visit.
- While New Zealand does not attract cultural tourists per se, cultural components have the potential to add value to the tourist experience.
- Tourists are not prepared to pay a premium for Māori elements in tourism eco-cultural products.

1. Introduction and Objectives

This research explores the demand for Māori cultural tourism in New Zealand. It contributes to a larger project, *Te Tapoitanga Māori* – ‘Growing regional Māori Tourism’, aimed at developing sustainable growth in tourism for Māori businesses and employment. The overall aim of that project is to develop eco-cultural tourism products with iwi. New Zealand’s Tourism Strategy aims to develop sustainable, quality tourism away from the main tourist routes to cater for a large increase in ‘interactive travellers’ who seek to interact more with natural, social and cultural environments outside main tourist hubs. Our research will capitalise on the growing importance of eco-cultural products to international tourists and look at the potential for interest from domestic tourists. Māori are in the best position to provide these products and therefore, this programme aims to enable Māori in rural areas to participate in tourism development in a meaningful and fruitful way.

With this broader aim in mind we sought to understand the demand for Māori cultural tourism products from international and domestic tourists with a view to capacity building for Māori communities within the tourism industry. The work was carried out in two case study areas associated with the iwi involved in the project and sits alongside complementary work looking at the supply side of tourism in these two areas. While both areas are remote, rural communities, they have quite different characteristics in terms of history, landscape, economic development and tourism development.

Within these two areas, one in the North Island and one in the South, two research projects were conducted. The first was a quantitative survey that aimed to understand demand for Māori ‘eco-cultural’ tourism products. The second was a qualitative study that emerged in part from the quantitative work and in part from gaps in knowledge identified through an extensive literature review of Māori tourism in New Zealand. This report is therefore in three parts:

1. Literature review and discussion of the New Zealand tourism context
2. The quantitative survey
3. Qualitative interviews

2. Literature Review

New Zealand tourism context

The New Zealand landscape is the most important driver of domestic and international visitors' choice of destination. According to research commissioned by Tourism New Zealand (AC Neilson 2002), around 90% of international visitors choose New Zealand as a holiday destination to experience the scenery and natural landscape; among other motivators is the desire to take part in physical activities (mentioned by 30% of the tourists). As a subset of physical activities, adventure tourism (e.g. bungee jumping, jet boating, hot air ballooning, caving and white water rafting) is a significant and growing segment of the tourist industry with many attractions situated against the backdrops that define New Zealand's landscape.

A further motivator (40%) for choosing New Zealand as a holiday destination is the desire to engage in the culture and history of the country. Included in the pursuits sought by this group are visiting museums and historical buildings, attending Māori cultural performances, visiting a marae, and engaging in farm-related activities (AC Neilson 2002). There were differences between visitors, depending on where they were from. Examination of key markets revealed that Australians and North Americans reported much higher interest in experiencing New Zealand's culture and history (45% and 52% respectively) than did respondents from the Asian market (20%) (AC Neilson 2002). Similarly, a greater proportion of Australians and North American tourists (33% and 35%) indicated physical activities as prompting their decisions to select New Zealand as a destination than did the German and Asian markets (26% and 23%).

For international tourists, New Zealand offers a wide range of tourism products and experiences, many with varying degrees of what can be termed 'cultural' content. These include aspects of European and Chinese culture as well as Māori culture. Cultural tourism in its broader definition is not a major driver for international visitors to New Zealand; however, researchers argue that cultural components 'add value' to many of the tourism experiences offered (Colmar Brunton 2003; McIntosh 2004). The focus is often on traditional or historical representations of culture, and the 'cultural' is sometimes combined with nature or eco-tourism attractions and activities (wildlife viewing tours, horse-treks, etc.). In terms of sustainable business development and the viability of Māori cultural tourism enterprises it is necessary to have realistic expectations regarding demand within this sector (McIntosh 2004). It seems that strategic development of this sector must consider the broader 'eco' context in which the Māori cultural tourism industry may be embedded.

Much domestic tourism is motivated and arranged quite differently to international tourism. International visitors are usually on a relatively long overseas holiday to a destination they do not know much about, while New Zealanders are mostly involved in shorter trips to places they know well. Despite this, it is clear that New Zealanders have a strong focus on the outdoors – beaches, mountains and rivers (Devlin et al. 1995), which means many domestic trips are motivated by the same natural landscapes and resources that interest international travellers. The shorter holidays of domestic tourists are likely to be focused on a particular activity or event (e.g. skiing, going to the beach, visiting friends or relatives, attending an event, participating in sport, or spending time with the family). Furthermore, New Zealanders' interest in New Zealand cultural products will be coloured by their knowledge and experiences of their own cultures. Comparing domestic and international markets in cultural tourism must therefore be done with some care and attention to context.

Ryan and Huyton (2000) explored the experiences of domestic and international tourists in Outback Australia (the Northern Territory) by correlating interest in Australian Aboriginal cultural tourism to a range of culture-based, adventure-based and nature-based items. They found that those who showed

interest in Aboriginal culture were also likely to want to engage with aspects of the natural environment. This association was much stronger among international tourists than with their domestic counterparts. Understanding, and acting on, this could potentially increase the visitor market for any tourism products associated with the indigenous population. Similar issues may also of relevance to understanding, and increasing, domestic interest in Māori cultural tourism in New Zealand.

We note that domestic tourists are more difficult to define than their international counterparts. In the literature, domestic tourists have been defined according to various criteria: distance from home, length of stay away from home, purpose of visit, and combinations of the two. In this project we chose to define domestic tourists as people travelling for non-work purposes more than 40 km from their home. We chose not to use any time criteria; respondents therefore could be daytrippers or away for several weeks.

Cultural tourism

Cultural tourism may also be defined according to a variety of criteria. Cultural tourism in its broadest sense incorporates a raft of tourism types such as heritage tourism, historical tourism, ethnic tourism, educational tourism, and indigenous tourism. While these terms are generally self-explanatory they are often used interchangeably with little regard to proper clarification. Indigenous tourism, for example, while easily understood as the ‘movement of persons for cultural motivations’ (Ryan 2002, p. 954), is in fact dependent on how ‘indigenous people’ are defined. Ryan (2002) interprets ‘indigenous people’ according to the United Nations criteria of ‘minority first nation peoples subjected to colonial histories but with specific rights of self determination’ (Ryan 2002, p. 954).

For the purposes of this research we have used the term ‘eco-cultural’ throughout to describe tourism that borrows from these and many other tourism definitions. While the research focus was on the demand for cultural aspects of tourism, in respect of the overall project aims this was incorporated into a broader consideration the benefits accruing to those that supply tourism. Tourism of any type is promoted for the benefits it brings to individuals, communities and regions. Economic benefits often take centre stage although lip service may be paid to other social, cultural or environmental benefits. Eco-tourism is seen by many as having the potential to provide these other benefits through, for example, conservation of the environment and by providing employment opportunities for remote communities.

By eco-cultural we mean tourism that, while focused on indigenous cultural products and indigenous cultural involvement, also involves tourism experiences with some nature content. In this context then, ‘indigenous’ refers to the Māori population of New Zealand, and is identified throughout as Māori cultural tourism. On those occasions where the more generic ‘cultural tourism’ is used we are referring to the representation of ‘any’ New Zealand culture. While it is generally agreed that eco-tourism is a subset of nature tourism (Valentine 1992; Diamantis 1999), many definitions take a broader approach. Ryan (2002, p. 953), for example, used the definition suggested by Ceballos-Lascúrain (1987) to describe eco-tourism as ‘concerning small groups of tourists seeking to know about and sustain natural environments, and also wishing to learn about the cultures associated with such places and the need to sustain local communities’. Under this definition cultural tourism is arguably a subset of eco-tourism.

Cultural tourism (of which Māori tourism is a subset) must be viewed in the context of a wider diet of tourist experiences rather than as a specific form of experience. McKercher and du Cros (2002) point out that cultural tourism is merely a ‘type’ of tourism and as such is governed by the same principles

that drive any other form of tourism. They list 15 underlying principles or structural realities that drive tourism, under five broad headings (Table 1).

Table 1 Underlying principles of tourism (adapted from McKercher & du Cros (2002, p. 27))

The nature of tourism	<p>Tourism is a commercial activity.</p> <p>Tourism involves the consumption of experiences; tourism is entertainment.</p> <p>Tourism is a demand-driven activity that is driven primarily by market forces, and not easily controlled by local people.</p>
Attractions drive tourism	<p>Not all tourism activities are equal.</p> <p>Cultural heritage attractions are part of tourism.</p> <p>Not all cultural assets are tourist attractions.</p>
Tourist behaviour	<p>Access and proximity dictate the potential numbers of visitors.</p> <p>Time availability influences the quality and depth of experience sought.</p>
Factors influencing visitation levels	<p>The service provided by tourist operators is often aimed at controlling the actions of the tourist.</p> <p>Tourists want well-managed services that lead them through the experience in an enjoyable, easy-to-understand way.</p> <p>The more mainstream the market, the greater the need for products that do not tax tourists mentally or ideologically.</p>
Cultural tourism	<p>Not all cultural tourists are alike.</p> <p>Cultural tourism products may be challenging and confronting but not intimidating or accusatory.</p> <p>Tourists want ‘authenticity’ but not necessarily reality.</p>

The first set of principles describes the nature of the tourist experience, one that has its basis in entertainment rather than learning. The tourism product must be packaged in such a way that it can be easily consumed by tourists. Learning opportunities, however, may be created from tourist experiences – even museum visits entertain with displays (McKercher & du Cros 2002). This is supported by McIntosh’s (2004) findings that tourists experiencing cultural tourism seek entertainment, just as with other types of attraction and activities, rather than in-depth anthropological engagement.

The amount of time a tourist allocates to any tourist experience will depend on time available, number of competing uses for that time, and priority given relative to other options, which also affects the way in which those attractions are consumed (McKercher & du Cros 2002). Māori cultural attractions and products do not rank highly in terms of tourists’ interest in comparison to attractions based on landscape or natural areas (Colmar Brunton 2003, 2004). This implies that tourists in New Zealand are more likely to be looking for short-duration, discretionary ‘cultural’ activities that do not require substantial emotional investment, to round out their trip. Consequently, factors such as access and proximity are more likely to dictate the potential number of visitors to Māori cultural attractions (McKercher & du Cros 2002). In an Australian context, Ryan and Huyton (2000) questioned the nature of the tourist’s ‘gaze’; their results indicated tension between a ‘real’ interest in Aboriginal culture per se versus interest in a well-marketed, entertaining product close to high-flow tourist areas.

‘Time availability’ also influences the quality and depth of experience sought: ‘the very nature of some types of cultural tourism often demands that substantial amounts of time or emotional effort be expended to appreciate fully the experience’ (McKercher & du Cros 2002, p. 35). This can create

challenges for tourism providers, as providing experiences that require a greater effort to consume may result in lower visitation, but making a product simpler to consume may compromise its quality.

Linked to this is McKercher and du Cros's (2002) fourth set of principles. The services provided in cultural products may need to be standardised, modified and commodified to control the movement of people. Businesses also need to ensure that tourists gain the best experiences possible and in ways that facilitate easy consumption. McKercher and du Cros (2002) suggest that this applies especially to international tourists who may only visit such a product once in their lifetime, although research has also found that domestic travellers in New Zealand are also only likely to consume many Māori cultural experiences once (Colmar Brunton 2004).

International tourists often have limited prior knowledge of the cultures whose 'products' they experience (McKercher & du Cros 2002). What they do know is often based on stereotypical images and they will seek experiences that confirm those stereotypes. This has implications for how cultural tourism products are presented to tourists. While McIntosh (2004) found knowledge of Māori culture to be low amongst tourists, with impressions largely stereotypical and built upon easily identifiable symbols and imagery, there did appear to be a gap between tourists' experiences of contemporary culture and the perceived/desired notions of culture. McIntosh (2004) found that Māori culture is presented to tourists as a kind of staged authenticity that involves little personal engagement or involvement. This serves to reinforce romanticised notions of 'exotic otherness' while providing meaning for the tourist within the parameters of a digestible (agreeable) authenticity.

Issues surrounding 'authenticity' of tourism experiences or products arise frequently in tourism literature. Usually products, festivals, works of art, rituals etc. are described as 'authentic' if they are made, produced or enacted by local people according to custom or tradition (Sharpley 1994). Importantly, the past is seen to hold the model of the original, and 'authentic' is usually equated with 'traditional' cultural representations (Cohen 1988; Taylor 2001). Authenticity is not a fixed static concept, however, but is negotiable and must be considered from the perspective of individual tourists and their expectations (Cohen 1988). To be 'authentic' cultural tourism products must be perceived as 'real' or 'genuine' by those consuming them. It may be that many tourists are satisfied to have their stereotypes reconfirmed. The stereotypical images of Māori culture presented in New Zealand are those that emphasis the traditional, something Taylor (2001) suggests perpetuates a sense that culture is *only* a thing of the past. A gap between notions of traditional indigenous cultural experiences and the contemporary nature of indigenous cultures has been reported elsewhere (Ryan & Huyton 2002). But, in seeking 'authenticity' in the Māori cultural tourist experience, many tourists may simply wish to consume a partial or 'negotiated' sample of Māori culture (McIntosh 2004). Instead of considering whether cultural tourism experiences are 'authentic', Taylor (2001) argued that the focus should be on experiences that involve personal interactions and cultural exchanges that are 'sincere'.

Lastly, McKercher and du Cros (2002) argued that indiscriminate application of the 'cultural' label confuses understandings of cultural tourism. Both McIntosh et al. (2000) and Colmar Brunton (2004) found that not all cultural tourists were alike; McIntosh described six types of cultural tourists, based on their potential motivations to experience cultural tourism products, while Colmar Brunton reported variations in experience dependent on tourists' general demographic characteristics. Moscardo and Pearce (1999) examined the demands for indigenous cultural tourism among tourists to a successful Australian Aboriginal cultural park. They sought to understand the nature of the Australian cultural tourism market by determining the types and demands of the 'ethnic tourist'. By clustering tourists based on characteristics the tourist considered important, they identified four typologies to describe tourists who visit cultural sites: an 'Ethnic Tourism Connection Group', who were particularly interested in high levels of contact with indigenous people in order to learn about aspects of their culture; a 'Passive Cultural Learning Group', who showed a highly developed interest in

understanding aspects of indigenous culture but were passive in their participation in activities; an 'Ethnic Products and Activities Group', with little interest in learning about ethnic people but who showed a good deal of interest in participating in activities, and in crafts and indigenous foods; and lastly, a 'Low Ethnic Interest Group', who, as the label suggests, showed the least amount of interest in all areas assessed, in particular in relation to direct contact with people and activities (Moscardo & Pearce 1999).

McKercher and du Cros (2002), suggest five similar types of cultural tourist: 'purposeful', 'sightseeing', 'serendipitous', 'casual', and 'incidental'. These categories are based on motivation and depth of experience sought. At one extreme the 'purposeful' cultural tourist travels for cultural tourism motives and seeks deep cultural tourism experiences, at the other the 'incidental' cultural tourist, for whom cultural tourism experiences are not a stated motive for travel, will nevertheless consume some cultural tourism products. This recognises that, while different types of cultural tourist potentially demand the same products, their experiences of these will differ (McKercher & du Cros 2002).

Māori cultural tourism

A substantial body of literature has addressed Māori cultural tourism in New Zealand. These include historical accounts of Māori involvement in tourism (Ryan 1996; Barnett 1997), classifications of cultural tourism products (Barnett 1997), case studies of selected products (Hall 1996), and theoretical considerations of what Māori tourism can be defined as (Barnett 1997; Taylor 2001; McIntosh et al. 2004). Cultural issues also feature prominently in work that does not specifically address cultural tourism, such as Ryan's (1998) exploration of eco-tourism. The majority of literature appears to consider Māori cultural tourism from a supply perspective, although, increasingly, the demand for Māori cultural tourism is attracting research interest (McIntosh et al. 2000; Ryan 2002; Colmar Brunton 2003, 2004; Ryan & Pike 2003; McIntosh 2004). This is in part recognition of the need to understand demand in order to successfully market cultural tourism products: 'an understanding of visitor demands and expectations is particularly important in the search for commercial opportunities to attract new audiences' (McIntosh 2004, p. 2).

Supply-side definitions of Māori cultural tourism products

From a supply perspective, cultural tourism products are usually segregated according to 'how' they involve indigenous cultures, with definitions depending to a large extent on purpose and context. The New Zealand Ministry of Tourism (2004, p. 8), for example, distinguishes between 'Māori in tourism' and 'Māori cultural tourism', using a framework for defining indigenous tourism proposed by Butler and Hinch (1996). 'Māori in tourism' describes Māori involved in the industry through employment and/or the provision of tourism-related goods and services that may not necessarily have an explicit cultural component, whereas 'Māori cultural tourism' describes tourism that specifically embraces Māori culture. These definitions are useful to an agency trying to understand how to support different kinds of Māori tourism businesses through targeted policies and programmes.

Ryan (1996) arguably aiming to theoretically understand different perspectives on Māori business, found Māori to be increasingly involved in tourism services provision through ownership of accommodation, attractions, transport or tours that are less obvious cultural tourism products. Difficulties arise in categorising Māori involvement in these aspects of tourism as practices vary between locations, industry sectors and stages of business; the emphasis in the research is usually on more easily recognised cultural tourism businesses such as Whale Watch Kaikoura. Ryan gives several examples of Māori-owned businesses whereby owners offer cultural information and perspectives to tourists who express interest. If this happens they could be counted as 'Māori cultural tourism' experiences, if not, they would continue to operate similarly to any other tourism business

(‘Māori in tourism’). Ryan also questions the extent to which these would be considered as cultural products by the tourists themselves. This aspect of definition becomes important in understanding more about the marketing of Māori tourism products.

Considering the quality and depth of the experience seems a useful way to explore tourist experiences of Māori culture. Ryan (1996, p. 229) proposed a means of ‘locating Māori tourism products on a perceptual map formed by three axes consisting of: (1) the size and ownership of the product; (2) the duration or intensity of the visitor experience; and (3) the degree to which Māori culture forms the core of the tourism product on offer’. The first and third axes are those factors of ‘ownership and content’ normally discussed with regard to the supply of Māori tourism, whilst the second axis deals with the experiences of the tourist themselves. This model, therefore, not only recognises variations of experience but also presents the opportunity to link supply and demand studies more directly. Ryan cautions against temptation to assign the ‘authentic’ to any particular points on the axes, given the wide variety of Māori tourism products available for tourist consumption. Again, the lack of prior knowledge many tourists have of New Zealand before visiting suggests assumptions of authenticity are somewhat problematic.

Tourists will have varying intensities of engagement with Māori culture in New Zealand, and while cultural tourism might not be the primary motivation for their visit, recent research suggests value is added to tourists’ experiences by cultural components (McIntosh 2004). Instead of focusing on the highly visible ‘Māori cultural tourism products’ we need to find a way to understand how cultural components ‘add value’ to tourist experiences in general.

‘Māori cultural tourism’, in comparison to ‘Māori in tourism’, rests on products with Māori cultural components. Māori cultural tourism has also been interpreted in many different ways for visitors. These were identified by the now defunct Aotearoa Māori Tourism Federation and summarised by Barnett (1997, p. 472):

- Entertainment: includes concerts performed in hotels, restaurants, on marae and in museums.
- Arts and crafts: items produced for tourists that are generally sold in souvenir shops.
- History and display of artefacts (Taonga): generally referring to treasures held in museums and art galleries.
- Guided tours: many activities are included in this category (e.g. guided bush walk, half-day mini-van tour, guided tour of a marae).

These categories represent ways in which Māori culture can be ‘interpreted’ for the tourist, and again there are many variations of ‘how’ Māori they are. While some experiences are clearly able to be classified as ‘cultural tourism’, many are general attractions or activities that could variously be described as being at least partially ‘cultural’, ‘eco’, ‘nature’ and ‘historical’ or ‘heritage’ tourism. Both terms – Māori tourism and Māori in tourism – are open to question. For example, McIntosh et al. (2004) asked ‘to what extent must a business be ‘Māori-owned’ to be classified as such?’ or ‘what of a non-indigenous business that employs indigenous guides?’ Another question might be how much culture is required in the product before a business can be classified as Māori?

Unsurprisingly, these definitional ambiguities appear in New Zealand cultural tourism research and are found in two reports outlining market research into cultural tourism prepared by Colmar Brunton for Tourism New Zealand. The first of these reports looked at demand for cultural tourism generally (Colmar Brunton 2003); the second highlighted findings from the first study that pertained specifically to Māori (Colmar Brunton 2004). Colmar Brunton (2004, p. 20) used the Tourism New Zealand definition of cultural tourism as any experience that includes ‘those dimensions that enable more depth of interaction with and understanding of our people, place and cultural identity’. A wide range of tourism experiences/attractions are incorporated in this definition: Māori cultural

experiences; performing arts; visual arts; museums; historic and heritage sites; festivals and events; gardens; niche accommodation providers; interactions with people and cultures; experiencing the cuisine of regions and cultures; and shopping for souvenirs and gifts. While this broad cultural tourism definition includes interaction with *all* New Zealand culture, not just Māori, it did embrace both ‘Māori in tourism’ and ‘Māori cultural tourism’.

The second report narrowed its focus to report on cultural tourism experiences that were specifically ‘Māori cultural products’(Colmar Brunton 2004). These included: Māori art exhibitions; exhibits of Māori history; sites important to Māori history; Māori cultural performances; Māori music concerts; marae visits; and staying overnight at a marae. The ‘obvious’ Māori component of these products enabled quantitative research into tourists’ experiences of these. Māori souvenirs, understood as any product with a Māori theme, and Māori cuisine, as a subset of local cuisine generally, were also identified as ‘Māori cultural products’. These, however, could only be ‘commented on’ as qualitative research findings or in ‘quantitative findings where these form an element of a broader cultural product by Māori’ (Colmar Brunton 2004, p. 21). Within any one of these products the degree of cultural content and involvement will vary considerably and whether or not tourists perceive them to be cultural tourism experiences is unclear.

McIntosh et al.(2004, p. 334) suggested that another layer, ‘cultural integrity’, should be added to the criteria used to determine the supply of Māori cultural tourism: ‘...a distinction needs to be made between two forms of Māori tourism, namely general Māori participation or involvement in tourism and values-based Māori tourism. The first has sought to measure Māori participation in the tourism industry, whereas the second seeks to describe *how* Māori are involved in tourism’. McIntosh et al. (2004) argued that the incorporation of Māori cultural values and practices is essential for sustainable Māori self-determined development and that such conceptual consideration will potentially feature more and more in indigenous tourism studies. These theoretical debates and categorisations, however, remain the prevailing themes in the majority of literature on the supply of ‘indigenous’ tourism in New Zealand. They are unlikely to be resolved (in terms of standardisation), because of the need to adopt a relevant perspective to satisfy individual research objectives.

Demand for Māori cultural tourism

International tourism demand

In contrast to the attention paid to the supply of cultural tourism, few empirical studies have addressed the demand for, and satisfaction with, cultural tourism in New Zealand. Approaches taken to understanding the demand for cultural tourism vary considerably, dependent on whether the focus is ‘theoretical’ (McIntosh et al. 2000; McIntosh 2004) or ‘applied’(Colmar Brunton 2003, 2004). Colmar Brunton’s (2004, p. 8) market research, for example, ‘aimed at gaining a better understanding of the current demand for cultural tourism products and to identify any gaps in supply that may exist’. In contrast in academic research the focus has been more theoretical, on experiences of the tourist themselves. McIntosh et al. (2000), for example, explored the motivations of visitors to three key international tourist attractions. Later work further explored types of demand by investigating international tourists’ motivations, perceptions and experiences of Māori culture (McIntosh 2004).

Academic research

McIntosh et al. (2000) focused on visitors at three attractions: ‘Whale Watch’, a Māori-owned and operated eco-tourism business based in Kaikoura, on the east coast of the South Island; ‘Tamaki Tours’, the Rotorua business that provides a range of specialised cultural experiences and traditional activities; and the ‘Museum of New Zealand – *Te Papa Tongarewa*’ in Wellington, which houses a large collection of Māori *taonga* (treasures) as well as the national marae – *Te Marae o Te Papa Tongarewa*. These were selected based on their high international profiles, their diversity from each

other (in terms of activity and content), and their commitment to the integrity of Māori culture. Visitors to these attractions were asked about satisfaction with their visit, their previous experience of indigenous attractions, and their level of interest in doing other Māori cultural activities. Details were collected on the tourists' personal values and travel philosophies, and their demographic and trip characteristics.

The resulting motivational analysis identified six 'types' of Māori cultural tourist: 'cultural tourists', those who want to learn about Māori culture and to meet Māori people; 'organised tour participants', who enjoy learning about Māori culture at the experiences they are taken to; 'cultural experimentalists', who visit to experience something new and different and who seek 'deeper' experiences; 'once in a life timers', looking for fun experiences rather than being motivated by wanting to understand indigenous cultures; 'family fun lovers', having fun and visiting major attractions with a preference for 'staged' performances; and lastly, 'general sightseers', who are similar to the previous group in that they wish to visit all major attractions of a given area (McIntosh et al. 2000). The six visitor segments were found to be distinctive in their reasons for visiting Māori attractions, their experiences of Māori culture, and the activities and attractions they like to visit.

Around half of the visitors surveyed showed a desire to experience Māori cultural tourism attractions and to learn about Māori culture as part of their New Zealand tourism experience. What is not clear, however, is whether the 'desire' identified was based on satisfaction with 'actual' experience or with 'preferred' experience, limiting the usefulness of these findings. Given that the study was focused on cultural tourism, it is surprising that so few of the respondents were classified as 'cultural tourists' (22.9%) or as 'cultural experimentalists' (19.1%). These two groups in particular appeared to be identified according to how they would 'like' to experience Māori culture, not how they 'did' so. This means that a surprisingly high percentage of visitors to the two attractions with the greatest focus on Māori culture were those who identified as 'family fun lovers' and 'general sightseers' (Tamaki Tours 36.2% and 58.2% respectively and Te Papa 21.5% and 57.7% respectively) whereas only 17.1% of the 'cultural tourists' were attracted to Tamaki Tours and 54.9% to Te Papa.

In later work, McIntosh (2004) took a quite different approach to exploring the demand for cultural tourism experiences, by interviewing visitors before and after their visits to New Zealand. This study explored tourist perceptions and expectations of Māori culture and the extent to which tourists visiting New Zealand were culturally motivated, and it sought insight into how tourists preferred to 'experience' Māori culture. Rather than categorising types of tourists, five dimensions of tourist experience were identified; 'gazing', 'lifestyle', 'authenticity', 'personal interaction' and 'informal learning'. Each of these dimensions described a different type of interaction with Māori culture.

The least interaction on a personal level, 'gazing', was used for tourists who preferred to simply view the host culture or 'gaze' on that which is different (Urry 1990). In the second level of experience, tourists preferred to learn about traditional and contemporary 'lifestyles' by visiting communities. However, the tourists interviewed found there to be limited opportunities to experience indigenous culture in this way. More common were traditional performances, often considered 'artificial' or 'fake' and viewed by many as being too 'touristy' or commercial in nature. These combined criticisms challenged the 'authenticity' of the experience. 'Personal interaction' was seen as a much better way to experience and learn about Māori culture although most respondents preferred brief experiences rather than immersion in the culture. Also, while many of those interviewed reported learning something new about Māori culture from their visit, this was usually 'informal learning'; information 'picked up on the road' rather than from visiting specific Māori tourist attractions.

McIntosh's two studies (2000, 2004) approached the tourist experience in different ways. The first was founded on visitor perceptions gathered in locations where they were perceived by researchers to

have experienced cultural tourism. The second was somewhat broader and more concerned with potential interest in cultural tourism experiences and how tourists 'preferred' to experience Māori culture. Although the second study was somewhat hypothetical, in that it did not link responses to specific experiences, it nevertheless provides more in-depth information on the extent to which participation and immersion with indigenous culture, as opposed to simply 'viewing' such culture, is considered important. It showed that tourists consume a partial or negotiated sample of Māori culture based on the tourist images they are presented with. Also, while they may express interest in learning about indigenous culture and report preferences for sincere interactions with indigenous people, tourists are seeking 'tourism' experiences, not in-depth anthropological engagement. McIntosh (2004) reported 'lack of time' as a barrier to experiencing Māori culture because tourists prioritised their time according to what they most wanted to experience. This supports McKercher and Du Cros's (2002) principle relating to time and prioritisation mentioned earlier.

Limitations to these studies

While these studies by McIntosh are important because they describe the ways tourists to New Zealand engage with Māori cultural tourism they should be viewed with a degree of caution. Little attention was paid in either study (McIntosh et al. 2000; McIntosh 2004) to what the tourists counted as Māori cultural tourism experiences. Certainly nothing is suggested that matches those criteria or categories described in supply literature. While, from the supply perspective it is relatively simple to assign cultural status to many tourism experiences, it appears just as important to consider whether the tourists themselves think experiences are cultural attractions. As McIntosh (2004) herself found, many of the engagements tourists have with Māori culture, such as visiting museums, are not considered experiences of Māori culture by the tourists themselves. The range of Māori cultural tourism experiences and products available in New Zealand is extensive but not always recognised as such by tourists, and Māori cultural tourism is a construct of those supplying it. Whale Watch, for example, chosen because of its 'commitment to cultural values', is not presented to tourists as a Māori cultural experience and yet the first of McIntosh's studies based cultural tourism research on visitors to this attraction (McIntosh et al. 2000). There is also a danger of inflating the importance of cultural tourism when asking people solely about that aspect of their visit.

Market research

In the market research approach taken by Colmar Brunton (2004), international tourists were also surveyed about their consumption of Māori cultural products. This consumption was found to vary dependent on the types of traveller. They explored 'potential' and 'actual' international travellers' demand for cultural tourism via an Internet survey. From these two groups a subset of 'interactive travellers' was identified. Tourism New Zealand (2003) defines interactive travellers as regular international travellers who consume a wide range of tourism products and services. They seek out new experiences that involve engagement and interaction with natural, social and cultural environments and respect those environments. These travellers are considered leaders by their peers, use technology to enhance their lives, and value authentic products. This group were found to be more 'interested' than other international travellers in Māori cultural activities.

When asked specific questions about 'actual' participation in cultural tourism activities, however, for most Māori cultural products, there was little difference between 'interactive' and other international travellers. Higher participation levels by interactive travellers were found at sites important to Māori history (46% of interactive travellers compared with 38% of all travellers) and exhibitions of Māori history (44% vs 39%). For Māori cultural performances, interest was the same for each group (45%), while for overnight stays on a marae, interactive travellers participated less than all travellers (1% vs 3%). Some methodological issues challenge the value of this research. Primarily, given that one criterion used to describe interactive travellers was 'high technology usage', it should have been acknowledged that this was self-selective in an Internet survey. The quantitative research consisted of

three surveys; a telephone survey of domestic travellers and Internet surveys of both actual and potential travellers to New Zealand. Also, while the qualitative methodology used was described in detail it did not appear to contribute substantially to what was reported.

The Colmar Brunton (2004) report described variations in experiences of cultural products by New Zealand region. There were also variations in experience by different groups of tourists, and sub-groups were identified based on country of origin, age and travelling companions. Other aspects pertaining to consumption of Māori tourism reported on included expenditure on cultural products, satisfaction with these products, and awareness of activities involving cultural products. Much of what is reported lacks supporting analysis: the use of the 'interactive traveller' subset complicates the reported responses of the international tourists; also, the terminology used is at times misleading. Forty-five percent of all 'actual' travellers, for example, had visited a Māori cultural performance yet are reported as being merely 'interested' in this type of experience; similarly, marae visits were reported as being 'popular' with those who had participated (31 % vs 32 %).

Overall, however, in the context of other tourist experiences/activities in New Zealand, Māori cultural products rated relatively poorly in all the measures used (Colmar Brunton 2004). This report drew 'Māori' products out of a broader general tourism demand study that included cultural experiences (Colmar Brunton 2003). The three most popular activities reported were natural wonders, shopping for souvenirs and gifts, and physical outdoor activities. Visiting historic buildings, museums and sites important to New Zealand history all rated higher than the three most popular 'Māori' tourism activities: visiting sites important to Māori history, Māori cultural performance, and exhibitions of Māori history. As already pointed out, while studies such as this and those by McIntosh (2000, 2004), provide useful information on specific experiences, there is a danger of inflating their importance within the overall tourist experience of New Zealand. As all of these studies have found, cultural tourism was not the primary influence on tourists' decisions to visit New Zealand and, while many visit at least one cultural attraction, these are consumed as part of the broader tourist experience (Colmar Brunton 2004; McIntosh 2004).

Domestic Māori cultural tourism demand

In comparison to research into international tourists' experiences of cultural tourism the domestic market has received little attention in New Zealand research. This may be because, similar to findings reported in Australian research, there are considerably lower levels of interest expressed in the consumption of cultural tourism products and experiences by domestic tourists compared with international tourists. According to figures released by the Ministry of Tourism (2004), only 0.5% of domestic travellers on overnight trips participated in Māori cultural activities whereas about 19.6% of international travellers experienced a Māori cultural activity. Such low participation levels by domestic tourists, however, may be attributable to both differences in interest levels and shorter length of holidays.

Only three pieces of New Zealand tourism literature report explicitly on the domestic consumption of Māori cultural tourism: the Colmar Brunton (2004) research, which included domestic travellers as one of the subsets of visitors surveyed; Ryan and Pike (2003) investigated Auckland visitors to Rotorua and the role Māori culture played in their perception of place; and Ryan (2002) presented a primarily theoretical discussion on cultural discourse and issues of cultural identity to explain lack of interest in cultural tourism by domestic travellers. While all of these reports discuss domestic consumption of cultural tourism, only the Ryan and Pike (2003) research focused specifically on cultural products in their survey questions.

Colmar Brunton's (2004) report into demand for cultural tourism surveyed domestic visitors on participation levels and perceptions of cultural activities experienced. Participation levels were generally much lower for domestic tourists than for international travellers and domestic travellers were found to have a sense of being 'apart' from Māori cultural products, or simply lacked interest in them. Overall a typical pattern was found whereby domestic tourists experience a Māori cultural product once, often as part of their children's educational experiences. Also, there was an attitude that Māori cultural products were for 'tourists', with the assumption that as domestic visitors they were not tourists.

These findings are consistent with the cultural proximity argument proposed by Ryan (2002), whose research found the New Zealand population is not drawn to Māori cultural tourism because of spatial closeness that renders the 'exotic other' somewhat obsolete. Ryan reports on other research that found 'nationals' who expressed most interest in cultural tourism in New Zealand were those born outside New Zealand, particularly migrants from Northern Europe. This argument, however, takes little account of the meaning of the tourism frame in which questions are asked. For example New Zealand educational or corporate groups that visit a marae for the purposes of learning about Māori protocols and perspectives would not be included in these two surveys (Colmar Brunton 2004; Ryan and Pike 2003), but the facilities used and the infrastructure needed for these groups would be similar to that used by international tourists. Also, people who have been to a marae for purposes associated with work may be less interested in such an experience in a tourism context.

Ryan and Pike (2003) found that domestic visitors did not consider cultural aspects an important part of their experiences in Rotorua, despite Rotorua being recognised by most as a destination with many cultural tourism products on offer. Again, this was in part because the domestic visitors surveyed did not appear to consider themselves 'tourists'; cultural tourism products were perceived to be those presented as traditional performance packages to a mainly international market. Ryan and Pike (2003) suggested that expressions of contemporary culture may be more attractive to domestic tourists. They argue that many of the providers of contemporary tourism fail to recognise the importance and contribution of contemporary cultural forms.

However, the context in which Māori cultural tourism occurs for New Zealanders presents a challenge. Quoting Carlson (1998), Ryan (2002) points out that Pakeha New Zealanders are ambivalent about things Māori as a result of New Zealand's recent history of settling claims associated with a dishonoured Treaty of Waitangi. He notes they are also influenced to some extent by the high profile activities of a few Māori activists, and by the changing status of Māori in New Zealand society. These meanings could affect non-Māori New Zealanders' feelings about Māori cultural products as something to be enjoyed as part of a holiday experience.

The different ways in which domestic and international tourists are defined for the purposes of sampling can affect the results that are reported. In the Colmar Brunton Report (2004), for example, domestic tourists appeared to participate very little in cultural tourism of any description. However, in that survey New Zealanders were sampled randomly at home, and screened for whether they had been away on holiday for at least two nights during the previous three months (Colmar Brunton 2004, p. 11). In comparison, international visitors were a self-selecting sample generated at tourist venues around New Zealand and through a website.

Summary

The previous sections have reviewed the literature and research pertaining to supply and demand of Māori cultural tourism experiences in New Zealand. This review shows that, despite a growing body of work from both perspectives the two are often tangential rather than analogous to each other. A considerable body of work, for example, has addressed the classification and identification of Māori

cultural tourism products and Māori participation in the supply of cultural tourism in New Zealand. More recently research attention has focused on issues surrounding the underlying cultural integrity of these tourism operations and promises better approaches to guide those who wish to become involved in the supply of Māori cultural tourism. In contrast demand research has remained strongly focused on the categorisation of different types of cultural tourists, despite recognition that cultural tourism is not a major driver of tourism consumption in New Zealand. Given that demand is important to understand in order to facilitate supply, new research approaches appear to be called for.

Primarily it seems that, while we need to acknowledge that Māori cultural tourism is only one part of a bigger picture of tourist consumption, we do need to know more about tourists' consumption of cultural products. Key to this is establishing what tourists consider cultural tourism to be and then determining what value is added to mainstream tourism products by cultural components. The tourism principles suggested by McKercher and du Cros (2002) offer useful guidelines within which cultural tourism demand can be assessed. For international tourists, eco-cultural tourism appears to be an option that can satisfy the dual aims of local community involvement in tourism with the supply of products that appeal to the broadest possible range of tourists visiting New Zealand.

For domestic tourism the picture seems quite different, given domestic tourists even lower levels of interest in Māori cultural tourism. There appears to be an inherent challenge to understanding domestic tourism within the same terms as international visitors, in part because domestic visitors do not even appear to consider themselves as tourists. Despite this, domestic visitors often purchase the same tourism products as international visitors, and research is needed to better understand their experiences as tourists. It may be useful to segment the domestic market according to interest and engagement with cultural tourism, in the same way as has been applied to the international market. As Ryan (2002) reported, the domestic tourists most likely to visit cultural experiences were recent migrants to New Zealand. There may be other categories of domestic tourists with distinct interests in Māori cultural products. One segment of the domestic market that has not been addressed, for example, is interest by Māori in Māori cultural tourism products.

3. The Quantitative Survey

Survey research objectives

In devising the analytical framework and approach for assessing demand for Māori eco-cultural tourism in New Zealand, we identified two broad issues. First, Māori cultural tourism alone does not constitute a significant motivator of international tourists' decisions to visit New Zealand. Most tourists come here wanting to engage with New Zealand's dramatic and scenic landscapes. It is logical, then, that directing Māori cultural tourism ventures toward this large motivator of tourist behaviour preference (i.e. eco-tourism) will increase opportunities for capturing tourists' interests (and dollars).

Second, it is clear that tourists who might be interested in eco-cultural products do not necessarily constitute a homogenous group. Demand for, and levels of engagement with, cultural products vary among those tourists who consume them. As researchers into cultural tourism within New Zealand and elsewhere have determined, desire for engagement with indigenous people and aspects of their culture varies considerably. Some sectors of the market actively seek cultural engagement, endeavouring to broaden their understandings of the host indigenous culture. Yet those who want some kind of cultural engagement do not necessarily want to consume "authentic" experiences

(however tourists define those), although there is a clear subset of people demanding “authentic” experiences. Thus, it would be somewhat naïve to assume that all cultural tourists seek the same kind of encounter from eco-cultural tourism. Successful development of Māori eco-cultural tourism products will need to reflect this spectrum.

To meet the broader aim of the Te Tapoitanga Māori project, this survey research has the specific objective of understanding the demand for eco-cultural tourism products. The original aim, outlined above, indicated a focus on international tourism in a bid to increase foreign exchange earnings while developing products most notably for the interactive traveller. However, the domestic market is important for the viability of many tourism ventures in New Zealand, so we believe their interests and perceptions are also important in understanding demand for Māori ecocultural products. To this end we have developed the following specific research questions:

Who are potential consumers of the Māori cultural tourism product?

What are the specific interests (drivers) of this group of tourists?

Are there differences in demand in the two different case study areas?

Are there differences in demand between domestic and international tourists?

Methods

Case study areas

The quantitative survey was carried out in two case study areas. The northern study area is located around East Cape on the North Island (Fig. 1). It covers the territory east of Rotorua, extending from Whakatane on the northeast coastline, round the cape, to Gisborne on the East Coast. The Te Uruwera National Park is situated in the interior and is a substantial focus for eco-tourism activity in the area. Other significant tourist attractions include the East Cape lighthouse and the scenic and rugged coastline. Few major roads access the remote regions and tourists tend to visit attractions in the area as they drive through.

The southern study area is Banks Peninsula on the east coast of the South Island (Fig. 2). This volcanic peninsula, while easily accessible from the City of Christchurch, is sparsely populated and its rough terrain means there are many remote, less accessible communities within the area. The main road goes directly to Akaroa, the major township on the peninsula about 70 km from Christchurch. Akaroa serves as a day destination for many Christchurch residents as well as for other domestic and overseas tourists. In terms of tourism development there are some ocean mammal watching eco-tourism businesses based in Akaroa but little development elsewhere on the peninsula. Despite a wealth of Māori history, there is little or no Māori cultural tourism industry.



Fig. 1 Northern case-study area: East Cape – Te Urewera.

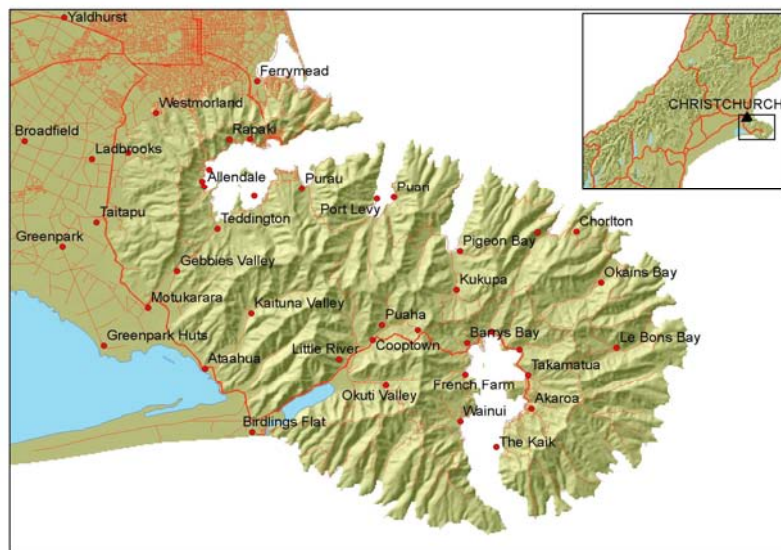


Fig. 2 Southern case-study area: Banks Peninsula.

The questionnaire

The interviewer-assisted questionnaire (See Appendix 1&2) was developed and piloted in Christchurch during November 2004. The survey instrument comprised three sections; the first measured international and domestic tourists' interests in experiencing Māori cultural tourism products alongside other possible types of attractions and/or experiences available in New Zealand. Throughout this paper these will be referred to as 'general attraction items'. The second section sought to determine tourist interest in particular 'Māori eco-cultural tourism products'. Three scenarios (specific to each case study region) were presented to each respondent for comment. The third section collected socio-demographic data and other travel-related characteristics.

Following some basic adjustments to the survey after the pilot study, it was administered in both case study areas. A total of 286 surveys were completed in the northern area and 200 for the southern. Data were gathered simultaneously over the summer months, from mid-December 2004 to mid-January 2005. Data were gathered from several locations within each area. In the north these were Whakatane, Gisborne, Waikaremoana and the East Cape lighthouse area. In the south sampling locations were Little River and Akaroa. In the northern case study, sampling was also conducted in Rotorua because of its prominence as a cultural tourism destination located very close to the rural areas being studied. In the southern case study, sampling was also conducted in Christchurch because it is the major source of visitors to the peninsula.

Sampling

Surveyors approached tourists in public areas at selected locations. An initial screening question was asked to determine whether respondents were visiting from overseas or, in the case of domestic tourists, from at least 40 km away. As we were particularly interested in the independent travellers, coach tourists were not actively sought. Language problems precluded approaching Asian tourists.

Domestic tourists were divided into two groups: those from within and those from outside each region. Those from within the region who were interviewed did not live at the sampling site but were taking a trip, be it a day trip or an overnight trip. Non-regional domestic tourists were from other locations around New Zealand. For the purpose of the survey, we were not interested in the opinions of local residents. In the northern case study, 104 domestic (both non-regional and regional) and 182 international tourists were sampled (36%:64%), and in the southern study 59 and 141, respectively (30%:70%).

Two important aspects of our sampling strategy will have had some impact on our survey findings: first, the surveyors used and second the time of year the survey was carried out.

Two different people were employed to carry out the survey work – one in the north and one in the south. Our southern surveyor was a postgraduate student with considerable experience in carrying out research on her own behalf. In comparison, the student employed in the northern area had considerable experience in survey work but little in designing and analysing research. The southern surveyor also had a closer relationship with the survey designers and greater access to casual conversation about how the research was going than did the northern surveyor. This means that at times the southern surveyor did not accept answers at face value and instead encouraged respondents to respond in more depth than they may otherwise have done. This may have had an effect, particularly on the question related to daily budgets (which proved difficult for tourists to answer without some clarification) and it may have had some impact on the questions associated with the scenarios. It would be possible, for example, for a surveyor to have some impact on the number of people who responded to questions about our scenarios rather than just recording a visitor's lack of interest in the product. This points to deficiencies in the way we asked the questions in our survey and

how we trained our surveyors, but they are also issues we did not foresee and which did not become clear until some time into the data analysis stage of the research.

Sampling was conducted in December/January (2004/05), the peak time for longer family summer holidays in New Zealand when there are opportunities for water-based and other outdoor recreation activities. This may have affected the kinds of domestic and international visitors we were able to contact for this study. Had the sampling occurred at other times in the summer season, it is possible that the distribution of age groups, interest groups, and family groups may have differed from that encountered at the time we surveyed. Likewise it is possible that international visitors from different countries come in different proportions over the summer months. The distribution of nationalities represents only this one time of the tourist season.

Comparison of the two study samples

The demographic profiles of the samples differed both by area and by the type of tourists (domestic or international). A comparison follows between the two study samples and also in relation to the wider international visitor population. Note that, although 486 people were interviewed (northern area = 286; southern = 200), not everyone was able to answer every question and in some instances questions were not applicable to some respondents. Subsample sizes reported here reflect the number of useable responses to each question.

Characteristics of the sample

Table 2 shows that the proportion of domestic compared with international visitors at each survey location varied considerably from 6% domestic in the Christchurch sample to 68% domestic in the Gisborne sample. These differences can in part be attributed to the survey locations used, particularly in the southern study where most of the domestic tourists sampled in Akaroa and Little River were from Christchurch. Sampling domestic tourists in the relatively large city of Christchurch was more difficult.

Table 2 Domestic and international visitors sampled at each survey location

Survey location	n	Domestic (%)	International (%)
Akaroa	73	44	56
Christchurch	94	6	94
Little River	33	64	36
Southern total	200	29.5	70.5
Rotorua	119	38	62
Gisborne	81	32	68
Te Araroa	13	54	46
Waikaremoana	26	38	62
Whakatāne	47	34	66
Northern total	286	36.4	63.6
Sample total	486	33.5	66.5

Age

The samples from the two case studies differed in their age distribution (Table 3). Northern respondents were younger than those from the south. Fifty-one percent of international and 38% of domestic tourists from the north fell into the 20–29 year age cohort. In comparison to the north, the southern sample was considerably older with over one-third of all those interviewed aged 50 years or over, and lower numbers of both domestic and international visitors being under 30.

Table 3 Age distribution of domestic tourists in the northern and southern samples (%)

Age group	Northern case study		Southern case study	
	International (<i>n</i> = 182)	Domestic (<i>n</i> = 104)	International (<i>n</i> = 142)	Domestic (<i>n</i> = 58)
Under 30	51	38	26	14
30–49	37	51	37	46
50+	12	11	37	40

This age distribution may have resulted from sampling error or it may indicate that an older group of people were visiting the southern area at the time of sampling. It is possible that the population of tourists in the East Cape – Te Urewera area were, in fact, younger than those at Banks Peninsula, particularly as surveys were run during peak family holiday season: December/January, and given the nature of the recreation and tourism opportunities in the different areas. Akaroa offers good opportunities for older travellers, particularly because of its accessibility as a day trip destination from Christchurch, whereas East Cape and Te Urewera are less developed with fewer accommodation facilities. This balance, for example, may have changed somewhat if the samples had been taken from Banks Peninsula Bays where there are camping grounds but few other accommodation facilities.

There were also distinct age differences between domestic and international visitors in the sample. To some extent this may reflect the time of sampling in peak holiday season, as many more international visitors were under the age of 30 and many more New Zealand visitors were aged 30–49 (Fig. 3).

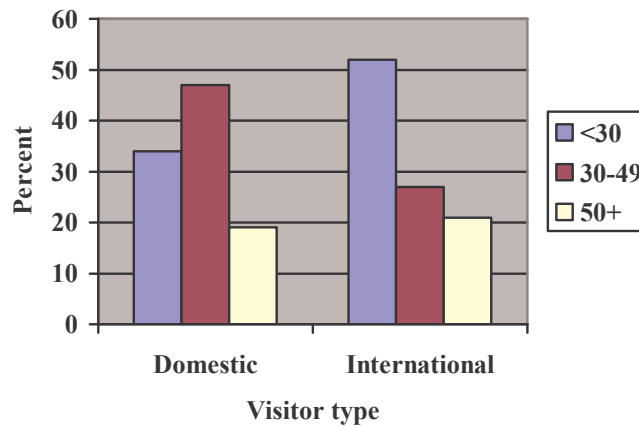


Fig. 3 Age groupings of domestic and international visitors across full sample.

Gender

The gender distribution of respondents was similar in both the north and the south and in the domestic and international parts of the sample (Table 4). Over all groups females were more frequent respondents than males. The northern sample had slightly more females to males than the southern one and domestic tourists were more often female than were international tourists. The southern surveyor noted that when couples were asked to participate, the female was often more likely to answer questions.

Table 4 Gender of respondents (%)

	Northern case study		Southern case study	
	Domestic (<i>n</i> = 104)	International (<i>n</i> = 182)	Domestic (<i>n</i> = 58)	International (<i>n</i> = 141)
Male	40	43	41	45
Female	60	57	59	55

Country of origin of international tourists

All respondents were asked to indicate their country of residence. Data were then sorted into region of origin. The distribution of respondents by region (Table 5) shows the greatest number of international tourists for both study areas as coming from the United Kingdom. The second largest number of visitors in both study areas was from mainland Europe (18% in the northern study area, 26% in the southern study area). The distribution of our sample reflects our focus on free independent travellers rather than tour groups. Hence, while the Asian market is a significant one, the propensity of this sector to travel in tour groups on routes well equipped with hotels large enough to accommodate coach tours means they have been largely excluded from this study. Since neither of our areas contain hotels of this size, however it is unlikely that they would have been part of our sample anyway.

Table 5 Country of origin by study region (%)

Country of origin	Northern case study (<i>n</i> =182)	Southern case study (<i>n</i> =142)
Asia	4	2
Australia	15	21
Europe	18	26
North America	12	19
Pacific	7	<1
UK	40	31
Other	4	0

Region of origin of domestic tourists

The tourist generating capacity of Christchurch for regional tourism on Banks Peninsula is reflected in the fact that 53% of those sampled in the south (*n* = 60) came from within the region, compared with

only 27% of tourists sampled in the north ($n = 103$) originating from within the East Cape/ Bay of Plenty region.

Budget

Participants to the survey were asked to indicate a daily budget (per person) for their trip. This budget was based on land costs; it excluded international airfares but included accommodation, transport, food and all other associated travel expenses (Table 6). In the southern sample of international tourists, the same percentage (38%) were on a budget of \$50 to \$100 per day as were on the higher daily budget of between \$100 and \$200 per day. In the northern case study area around half (47%) of all respondents were on a budget of \$50 to \$100 per day.

Table 6 Individual daily budget by study region (%)

	Northern case study		Southern case study	
	Domestic (n = 104)	International (n = 179)	Domestic (n = 55)	International (n = 138)
< \$50	33	22	53	16
\$50 to \$100	28	47	38	38
\$100 to \$200	30	25	5	38
>\$200	9	6	4	8

Domestic and international tourists had significantly different budgets from each other in each area (northern sample, $\chi^2 = 9.49$, $df = 3$, $P = 0.023$; southern sample, $\chi^2 = 35.95$, $df = 3$, $P < 0.001$), with domestic tourists in the overall sample more likely to report lower daily budgets than international tourists (Table 6). However, patterns between the two groups in the north and south varied, with more domestic tourists putting themselves in the \$100-200 category in the north while very few domestic visitors in the south put themselves into this category. Likewise international visitors in the north were more likely to be on a moderate budget than were domestic visitors while there were more domestic travellers on higher budgets than were international travellers.

However, these results need to be interpreted with care. We are uncertain about the reliability and comparability of this budget data. Our southern case surveyor found she had to question people carefully about what they spend because respondents tended to forget to include accommodation and transport costs, which in many cases had already been paid for, and so was not a feature of their day-to-day spending. The same level of questioning may not have occurred in the northern case. Another confounding factor may be the number of day trippers in the southern case study who reported a very low daily spend in the area under study. In particular this would explain the low daily spend in the south reported by domestic visitors.

The lowest spending travellers in our sample were young domestic travellers (Table 7); however, while international travellers in the over 50 age group were more often high spenders than those in the lower age groups, this was not the case for New Zealanders.

Table 7 Individual daily budgets by age groups (%)

\$/person/day	International			Domestic		
	<30 (n = 162)	30-49 (n = 84)	50+ (n = 67)	<30 (n = 55)	30-49 (n = 74)	50+ (n = 30)
<50	29	12	7	60	26	37
\$50 to \$100	47	48	28	25	30	50
\$100 to \$200	22	36	45	13	34	7
\$200+	2	5	19	2	7	11

Transport

All respondents were asked to identify their *main* mode of transport for this holiday (Table 8). As might be expected, domestic and international travellers differed significantly in their transport modes (southern, $\chi^2 = 24.47$; $df = 5$; $P < 0.001$; northern, $\chi^2 = 102.46$; $df = 5$; $P < 0.001$); the main difference being that domestic travellers were more likely to use private car and international travellers rental vehicles – either cars or campervans (Table 8). Only a small number of people travel by bus in either region. In the northern area international bus travellers were mostly travelling by back packer buses such as Kiwi Experience. In comparison, the buses people were using in the southern area were predominantly public buses and shuttle bus services.

There were differences between travellers in the northern and southern case study areas. Private cars were used by 37% of international travellers in the south, but by only 17% in the north. While many international visitors to New Zealand do in fact buy cars when they get here this does not necessarily account for the differences between the two case study areas. Because Akaroa is a popular day trip for Christchurch people. The high level of private car use reported in the south may refer to cars owned by New Zealand family members and lent out for the day or it may emerge from different patterns of travel between travellers in the north and south islands. Conversely, 55% of those in the north were using rental vehicles whereas only 26% of those in the south were.

Table 8 Transport modes for domestic and international tourists in the northern and southern case study areas (%)

	Northern case study		Southern case study	
	Domestic (n = 104)	International (n = 182)	Domestic (n = 59)	International (n = 141)
Private car	66	17	73	37
Campervan	6	12	10	11
Rental car	8	55	8	26
Domestic air	11	1	2	7
Bus	8	13	7	16
Other	2	2	0	4

Accommodation

Highly significant differences are suggested between domestic and international travellers in the accommodation that they reported using in the north ($\chi^2 = 21.77$, $df = 6$, $P = 0.001$) but less so in the

south ($\chi^2 = 2.22$, $df = 6$, $P = 0.057$). This needs to be interpreted with care given the relatively small numbers represented in some of the observed and expected values.

In the northern sample, domestic tourists clearly favoured motor camps and private homes, whereas international visitors were more likely to stay in a backpacker hostel. In the southern sample, domestic visitors were more likely to be staying in a hotel than were international visitors.

Table 9 Accommodation used by travellers in the two regions (%)

	Northern case study		Southern case study	
	Domestic (n = 102)	International (n = 182)	Domestic (n = 54)	International (n = 141)
Hotel	16	18	59	41
B&B/ Farmstay	5	3	11	5
Motel	10	9	7	16
Motor camp	27	18	7	16
Backpacker	11	33	6	14
Private home	29	18	7	5
Other	2	1	2	3

In part, the diminished number of hotel and private home users and the predominance of backpackers within our northern sample may reflect the types of accommodation available in the areas we were surveying. Some of the difference may also reflect our sampling strategy. East Cape is a relatively remote part of New Zealand and does not cater much for people preferring to stay in hotels or motels. This is less the case in Akaroa and Christchurch and reflects the presence of these facilities in the area.

Trip type

Both international and domestic tourists were much more inclined towards day trips to Banks Peninsula than they were into the northern region. Of the people visiting the two regions many more tourists visiting the northern region stayed 1 or more nights (80% of the 229) than was the case in the southern region (44% of the 148) (no table shown). This is easily explained by the fact that there is a major population centre within an easy 2-hour drive of Banks Peninsula, whereas East Cape is further from any major population centres and the narrow, winding roads make for slower and more difficult travel.

Length of stay in the region

Domestic tourists were significantly different from international tourists in their length of stay in the northern case study area ($\chi^2 = 25.82$; $df = 3$; $P = <0.001$), but less so in the south ($\chi^2 = 6.28$; $df = 3$; $P = 0.099$) (Table 10). Indications are that New Zealanders stay longer in the two areas than do overseas visitors, although this may be the result of the timing of our sampling. Domestic travel patterns at that time of year tend towards family holidays in which people stay in one place and make use of the good water-based recreation opportunities found in both areas. International visitors are more likely to be moving through and cramming more into their New Zealand holiday.

Table 10 Number of nights that visitors stayed within the case study regions (%)

	Northern case study		Southern case study	
	Domestic (n = 89)	International (n = 140)	Domestic (n = 54)	International (n = 94)
Day trip only	10	10	55	56
1–3 nights	34	62	24	36
4–7 nights	45	16	17	5
>8 nights	11	12	4	3

Travelling companions

There was little overall difference in the travelling companions of those interviewed in each area (Table 11). There were, however, differences between international and domestic travellers (northern, $\chi^2 = 60.8$, $df = 4$, $P < 0.001$; southern, $\chi^2 = 14.89$, $df = 4$, $P = 0.005$).

Table 11 Survey respondents' travelling companions (%)

	Northern case study		Southern case study	
	Domestic (n = 102)	International (n = 182)	Domestic (n = 59)	International (n = 141)
Alone	12	35	12	23
Partner/spouse	32	43	34	48
Friends	9	13	14	7
Family	40	7	29	18
Other	7	1	12	3

Not surprisingly, domestic travellers were less likely to travel alone or with only a partner or spouse, and much more likely to travel with family, particularly in the northern region. However, this observation may, again, be linked to family holiday season in which we sampled.

There was almost no difference in terms of main travel purpose between domestic and international travellers in our sample. Over the whole survey sample, 78% of visitors surveyed were on holiday while another 17% were visiting friends and relatives. Only 5% were travelling for some other reason. This lack of difference also applied between regions. There may be significant differences between the two areas at other times of the year, however, and such differences may be worthy of further exploration to help the regions in their marketing activities.

Information sources

Respondents were asked 'What sources of information did/do you plan to use to plan your entire trip?' As Table 12 shows, there were some obvious differences in the amount and type of information used within this sample. As might be expected, domestic tourists in both case study areas used the listed information sources much less than did their international counterparts. It would seem that domestic tourists were more likely to be in the area because of its proximity to their home bases, because the area was some agreed meeting point, or because they knew about the area as part of their general knowledge and past experience.

Perhaps more surprisingly both international and domestic tourists in the southern sample were using more and different types of information than their northern counterparts. While information usage for domestic visitors was at similar levels in both case study areas, it appears that international visitors in the south were much more likely to use any of the listed information sources and they also used a wider range.

Table 12 Number of information sources used (%)

No. used	Northern case study		Southern case study	
	International (n = 182)	Domestic (n = 104)	International (n = 142)	Domestic (n = 58)
None	60	90	13	79
2-3	40	10	27	17
4-5	0	0	36	0
6-7	0	0	24	0

In the northern sample only 40% of respondents gave one or more answers to this question. For international respondents in the northern region the three most commonly used information sources were websites (19%), travel agents (20%) and guidebooks (18%) (Table 13). A number also mentioned they got information from friends and family, and other travellers. In comparison to the north, 87% of international travellers responded to the question in the south. They professed to use a wider range of sources, the most popular of which were information centres, guide books, and brochures, with about half using friends and family, websites, and other travellers for their information (Table 13).

Table 13 Information sources used by domestic and international tourists in the two case study areas (multiple response question; percentages do not add)

	Northern case study		Southern case study	
	International (n = 182)	Domestic (n = 104)	International (n = 142)	Domestic (n = 58)
Guide book	18	2	68	10
Brochure	2	4	63	9
Friends/Family	11	1	54	12
Other travellers	14	1	42	0
Travel agent	20	2	10	0
Travel articles	0	1	18	2
Advertising	0	0	4	2
Information Centre	5	1	70	12
Website	19	8	53	21
Other	2	1	2	0

The differences in the *numbers* of people who answered this question in each case study area may arise from differences in the way our 2 surveyors approached this question and therefore may not be entirely reliable. However, differences in the *kind of information* that was used in each area is more reliable and may arise from the fact that respondents in the northern case study area were more likely

than visitors to the south to have decided to visit that region before leaving home (Table 14). Travel to Banks Peninsula appears to be more spontaneous, which may fit with observations made by our surveyor, working on another project, surveying tourists leaving New Zealand via Christchurch. She noticed that many people visit the Banks Peninsula region to fill any spare days they have in Christchurch before leaving the country from Christchurch International Airport.

Table 14 Where respondents made their decision to visit the two regions

	Northern case study		Southern case study	
	International (n = 165)	Domestic (n = 92)	International (n = 87)	Domestic (n = 37)
At home	62	98	22	89
Outside NZ	5	0	1	0
During travel here	33	2	77	11

There would seem significant merit in tourism businesses on Banks Peninsula concentrating a good part of their advertising locally in the Canterbury area, whereas for those in the north, more focus needs to be put on advertising through media that are more likely to reach an international market before travellers leave home.

The differing patterns seen in the north and south may also arise from the different products and services available in the two areas. In the north, the small proportion of the sample who reported coming into the area by bus could arrive on an organised backpacker bus tour without necessarily knowing what they are coming to. Also, because international travellers usually travel through the country from north to south, tourists in the North Island may be at an earlier stage of their trip and therefore possibly more amenable to just exploring without really knowing a great deal about the area before they come into it. Exploring this further could be of some merit since it may indicate that different regions around New Zealand need very different strategies to draw people into them.

Differences between the two study areas

The datasets of the two case study areas describe two very different sets of tourists. International respondents were more likely to come from the UK or Europe than any other region. The northern sample of international tourists tended to be younger and staying in backpacker hostels, motor camps and with family, whereas those in the southern sample were more likely to be older and staying in hotels and motels. Although rental car travel was a popular choice in both regions, compared with the southern respondents a greater proportion of those in the north reported travelling in a rental car or on a backpacker bus. The differences between domestic visitors in the two areas appears less than differences between international visitors although this is influenced by the smaller sample of domestic tourists relative to that of international visitors. Some of the differences may be explained by the high number of day trippers who are likely to be travelling to Banks Peninsula from their own homes in Christchurch.

Two cautions are needed when comparing these datasets. First, the sampling technique used (approaching people and asking them to participate in places where FITs gather) and small sample size make it difficult to infer beyond the sample to the wider visiting population in the regions. Second, there is a possible interviewer bias effect because we used a different surveyor in each region. Notwithstanding, some of the differences reflect what people working in the industry note about the people in their regions, and reflect qualitative observation of the way these two regions are used by travellers.

The most notable difference between the two samples was the distribution of age cohorts. To assess whether differences between the regions are due to differences in age distribution, separate analyses were carried out for each age group to eliminate a possible bias. More specifically, a comparison of means between the two case-studies for the attractiveness scale was undertaken by age group. This age-group-specific analysis (e.g. the ratings by 20–30 year olds) showed similar results to the analysis for the whole sample (i.e. not broken down by age group). Given the central importance of the attractiveness scale to this research, it can be inferred from this test that the difference in age groups is not likely to affect the overall results of the study.

Differences between domestic and international visitors

Unsurprisingly, domestic tourists differ from international tourists being more likely to be middle aged, travelling with family, and staying longer in both regions. They are also more likely to be staying with family in the north although those staying in the region in the south are more likely than international travellers to be staying in hotel accommodation. Domestic visitors tend to be travelling on relatively low budgets compared with international visitors, particularly if they are under 30 years of age.

‘General attraction’ items

As explained earlier, 13 ‘general attraction items’ (listed in Table 15) were used to explore the tourists’ level of interest in Māori cultural tourism experiences alongside other possible experiences in New Zealand. Participants rated the ‘attractiveness’ of each activity on a seven-point Likert scale (where 1 = not attractive and 7 = very attractive). Mean scores of 4 and above indicate a moderate or greater than moderate attraction to the item listed. The list of each item, the mean scores, and the standard deviations for each are contained in Table 15.

Three issues are noteworthy. The first is the relative ubiquity of enjoyment of the natural landscape (Item 1). Not only are the mean scores high but also the standard deviations are relatively low, indicating an extremely high level of agreement with this item in both regions. While this was predictable, the high ranking and agreement by tourists on this item provides an upper benchmark for attractiveness against which the other items can be measured.

The second issue refers to the typically bimodal distribution of attractiveness ratings for most items. Although we have used measures of central tendency in our analysis, almost all items tended to occur at the extremely positive or extremely negative end of the scale, with the exception of Item 1 ‘To enjoy natural landscapes’ (positively skewed – i.e. most rated this as attractive) and Item 12 ‘To find out about native plants and animals’ (approximating the normal curve)¹. In addition, domestic tourists’ assessments are unimodal and negatively skewed (i.e. most rated this as unattractive) for Item 5 ‘To buy authentic New Zealand souvenirs’. The degree to which bimodal distribution is present among responses supports our assumptions that in general tourists make fairly rapid (and possibly extreme) assessments of the attractiveness of ‘possible’ attractions (refer Section 8).

The third issue is that tourists assessed the attraction items differently depending on which region they were in and whether they were domestic or international (Table 15). For international tourists in the northern study region, the three highest scoring items (after Item 1; with means of 5.0 or 5.1) were ‘To experience Māori culture’, ‘To visit a Māori meeting house (Marae)’ and ‘To try a traditional

¹ This means that measures of centrality as provided have limited application. For a full interpretation of results it is necessary to consider the distribution of results alongside measures of central tendency.

Māori feast (hangi)’. In the southern region, the items that international tourists rated highest (after Item 1) were ‘To view dolphins or whales’ and ‘To go on a scenic boat cruise’ (means 5.3 and 5.2). Also highly rated were ‘To find out about native plants and animals’ and ‘To go hiking’ (means of 5.0). While tourists in the north found the idea of cultural experiences more attractive, tourists in the south tended to rate nature based experiences more highly. Mean scores for the southern sample for two of the three ‘Māori cultural tourism’ items were lower than 4. Only interest in experiencing Māori culture rated higher than 4.

For domestic tourists in the northern sample, only 2 attraction items rated higher than an average of 4 (after Item 1). These were mountain biking and hiking (Table 15). The Māori attraction items 2, 6 and 9 were all rated with a mean of 3.5 by domestic tourists in the north – a rating well below that of international visitors. Although domestic travellers in the north showed a low interest in Māori culture, it still ranked higher than visiting museums, buying authentic New Zealand souvenirs, viewing dolphins or whales, or learning about native plants and animals.

In the south, for domestic tourists, 5 attraction items rated higher than 4 (after Item 1). These were ‘Viewing whales and dolphins,’ ‘To go on a scenic boat cruise’, ‘To go hiking’ and ‘Learning about native plants and animals’ (Table 15). Overall, southern domestic tourists rated the three Māori attraction items 2, 6 and 9 only 3.1, 3.0 and 2.5 respectively. Lowest ratings were given to horse trekking (mean 2.4) and buying authentic New Zealand souvenirs (mean 1.8).

Table 15 Mean scores for general attraction items by region

	Northern sample				Southern Sample			
	Domestic		International		Domestic		International	
	Mean	S.D	Mean	S.D	Mean	S.D	Mean	S.D
1. To enjoy natural landscapes ^a	6.2	1.64	6.5	1.33	6.6	0.84	6.9	0.45
2. To experience Māori culture	3.5	2.64	5.1	2.39	3.1	1.63	4.7	1.57
3. To visit museums	3.2	2.70	3.9	2.68	3.8	1.57	4.0	1.80
4. To view dolphins or whales	2.9	2.33	3.3	2.48	5.3	1.78	5.3	1.94
5. To buy authentic New Zealand souvenirs	2.1	2.11	3.6	2.39	1.8	1.30	3.3	2.00
6. To try a traditional Māori feast (hangi)	3.5	2.68	5.0	2.42	3.0	1.98	3.6	2.01
7. To go horse trekking	3.4	2.56	3.1	2.36	2.4	1.94	2.0	1.71
8. To go white water rafting	3.9	2.66	4.7	2.69	2.7	2.16	3.0	2.21
9. To visit a Māori meeting house (Marae)	3.5	2.70	5.1	2.41	2.5	1.85	3.8	2.00
10. To go mountain biking	4.2	2.59	4.2	2.44	3.0	1.97	2.5	1.97
11. To go on a scenic boat cruise	3.8	2.50	4.6	2.31	5.4	1.60	5.2	1.97
12. To find out about native plants & animals	2.6	2.09	3.6	2.38	4.3	1.67	5.0	1.76
13. To go hiking	4.3	2.38	4.9	2.27	5.0	1.90	5.0	2.18

^a The authors recognise a limitation of this measure in the ‘positive’ emotional response embedded within the wording of this question. The other questions are more neutral asking respondents their desire ‘to view’, ‘to visit’ or ‘to experience’.

The mean scores for the Māori attraction items do not look particularly promising for anyone wanting to set up a business with Māori cultural components as part of the experience offered. However we note that the mean scores for horse trekking and buying souvenirs are also very low in this sample and yet there are viable horse trekking businesses and souvenir shops in both case study areas. Thus it makes some sense to look at the number of people who rated the attraction items as a 6 or a 7 (i.e. assessed the attraction item as highly attractive), because this gives an idea of how many people may be interested enough to consume such attractions. Table 16 presents the percentage of domestic and international tourists in each case study area who rated each attraction highly.

Table 16 Proportion of domestic and international tourists rating Item as highly attractive (%)

	Northern sample		Southern Sample	
	Domestic (n=104)	International (n=182)	Domestic (n=59)	International (n=141)
1. To enjoy natural landscapes	80	87	84	98
2. To experience Māori culture	33	52	5	32
3. To visit museums	33	39	11	23
4. To view dolphins or whales	20	36	56	59
5. To buy authentic New Zealand souvenirs	15	27	2	19
6. To try a traditional Māori feast (hangi)	34	54	17	27
7. To go horse trekking	28	22	16	6
8. To go white water rafting	41	54	20	26
9. To visit a Māori meeting house (Marae)	36	57	11	24
10. To go mountain biking	44	38	17	9
11. To go on a scenic boat cruise	33	45	54	61
12. To find out about native plants & animals	16	26	28	45
13. To go hiking	40	53	47	53

Overall these data would support the observation that there are two different groups of tourists in the two destinations. Tourists surveyed in the south – both domestic and international – were more interested in native plants and animals, in viewing whales and dolphins and in taking a boat cruise and slightly more interested in hiking. They were, however, less interested in Māori culture and in mountain biking, horse trekking and white water rafting than those in the northern sample. To some extent this can be explained by those in the over 50 age group being less interested in physically strenuous adventure activities such as rafting and mountain biking than their younger counterparts; however, in comparing across similar age groups, there were still clear differences between the tastes of tourists at the two case study areas (Table 17).

Table 17 Means of attraction items across different age groups

	<30		30–49		50+	
	South	North	South	North	South	North
1. To enjoy natural landscapes	6.79	6.2	6.75	6.4	6.75	6.78
2. To experience Māori culture	3.83	4.6	4.38	4.59	4.34	3.87
3. To visit museums	3.99	3.35	3.58	3.4	4.29	5.34
4. To view dolphins or whales	5.46	3.07	5.44	3.14	4.93	3.19
5. To buy authentic New Zealand souvenirs	3.01	3.06	2.65	3.03	2.75	3.09
6. To try a traditional Māori feast (hangi)	3.51	4.63	3.08	4.27	3.54	3.68
7. To go horse trekking	2.44	3.69	2.25	2.98	1.74	1.69
8. To go white water rafting	3.23	5.26	3.23	4.01	2.38	1.88
9. To visit a Māori meeting house (marae)	3.56	4.88	2.8	4.29	3.67	3.69
10. To go mountain biking	3	4.9	3.02	4.02	1.9	1.97
11. To go on a scenic boat cruise	4.93	4.26	5.38	4.38	5.62	3.88
12. To find out about native plants & animals	4.74	3.16	4.67	2.93	4.91	4.55
13. To go hiking	5.4	5.31	5	4.38	4.42	3.22

The over 50s in the south were more interested in a boat cruise, in hiking, and in viewing whales and dolphins than their northern counterparts. Likewise, those under 30 and 30–49-year-olds were more interested in native plants and marine mammal watching in the south, but more interested in Māori culture in the north.

Possible confounding effects on responses to general attraction items

The pattern of responses reported here may indicate two confounding effects. The first of these is a ‘regional effect’. This could encompass the combined influence of marketing and promotion of the region’s attractions and an individual’s temporal proximity to experiencing them; have tourists just had, or are they just about to engage in, a particular experience? For example, the northern study area is adjacent to Rotorua, renowned for its iconic Māori cultural tourism industry and thermal resorts. The effect of Māori culture in the Rotorua region could be to elevate its status relative to other possible attractions to be had in the region and potentially stimulates interest in Māori-related attractions when tourists are asked to rate them. In the southern case study, mammal-watching businesses, walking tracks, and ocean and water landscapes feature prominently and could be a catalyst of the regional effect underpinning the choices made by the southern study sample. However, individuals could select a particular area because of geographical proximity to specific attractions or features of a region, quite separate from the marketing or promotional focus. In that case sampling within a region obviously might produce a preference for the kinds of things on offer locally. New businesses and marketing bodies alike may well benefit from understanding the regional effect, as a strategic tool for marketing and planning.

There may also be a ‘previous experience effect’ in operation. In general international tourists enter New Zealand via Auckland and depart through Christchurch (Becken & Wilson in press). That the Rotorua region is a strong international drawcard for the Māori cultural tourism experience may overshadow responses to other items in the north, and similarly be reflected in the lowered

attractiveness rating of cultural items by the time tourists reach the South². It stands to reason that the potentially more diffuse and passive process of ‘experiencing Māori culture’ (item 2) (with its potential to happen independent from tourism operators) displays a lesser ‘effect’ than the other two ‘Māori cultural’ items. Nonetheless, it was still rated lower in the southern study area than in the north. Even among domestic tourists the mean scores on the three attraction items were all slightly higher in the north than they were in the south, but were also well below the mid-point of 4. Likewise, the very small proportion of domestic tourists interested in these items indicates that they were not generally attractive to domestic tourists.

Tourists’ interests in Māori culture

Given that this research has the development of eco-cultural tourism as one of its broader aims, we wanted to know what type of tourists show a particular interest in Māori culture. We suggest that the general attraction items can be used as instruments to measure the kinds of activities a particular ‘type’ of tourist might engage in. In deciding upon the general attraction items, we proposed that distribution of response data might cluster around distinct tourist types. Hence we proposed that the data from the general attraction items could be used to construct measures that define the ‘Māori cultural tourist’ (measured by item numbers 2, 6, and 9).

Reliability analysis was run on individual response items considered relevant to the construction of an interest in ‘Māori culture’ scale³. The strength of the association found between the ratings of ‘culture scale’ individual items was found to be exceptionally high (0.95 in the north and 0.77 in the south). We therefore consider this group of items a robust measure of interest in Māori cultural attractions. Having determined the strength of association between the responses to the items measuring Māori culture, mean scores for each respondent were generated and adjusted for the number of items included in the scale⁴. The distribution of responses thus had a possible range of 1 to 7, to match the original attractiveness scale range. Data were then regrouped and each respondent was classified as having either a low interest (scoring 1–2), moderate interest (scoring 3–5) or high interest (scoring 6–7) in Māori culture (as defined by the original three variables).

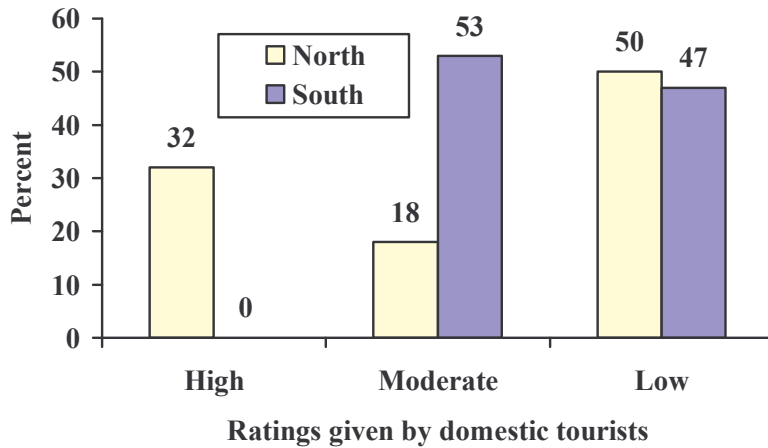
Figures 4 & 5 show the distribution of these responses by region. More respondents in the north reported high interest in Māori culture than in the south. In the southern sample the greatest percentage of tourists indicated only a moderate interest in Māori culture. The distribution of responses is consistent with those for individual attraction items.

² Qualitative responses gave some support for this finding. When southern respondents were asked about interest in experiencing a traditional hangi and cultural performance, many said they had ‘already done that sort of thing in Rotorua’, or ‘that is not what we have come down south for’.

³ A very high alpha value (correlation) was reached in the northern study area ($\alpha = 0.95$) and a moderate to high value was reached in the south ($\alpha = 0.77$). Alpha did not increase with the deletion of any single item and item-total correlation values were satisfactory in each study area. Chronbach’s Alpha values should be above 0.7 for the scale measure to be considered reliable (De Vaus 2002). The strength of the association found between these items deems the ‘culture scale’ a robust measure of interest in Māori cultural attractions.

⁴ This is done by adding the scores for each item included in the culture scale, and then dividing by the total number of items (in this case three). This produces a value that corresponds to the original attractiveness scale.

(a)



(b)

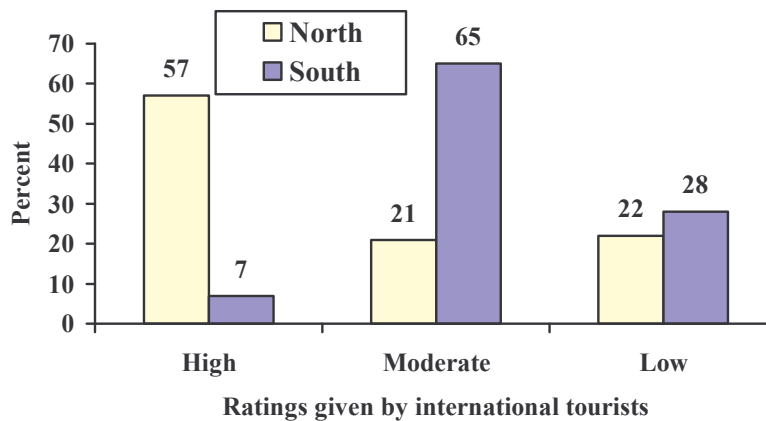


Fig. 4 Interest in Māori culture shown by (a) domestic and (b) international tourists surveyed in two study areas in New Zealand, summer 2004/05.

Scenarios in the two case study areas

Three detailed scenarios describing a particular tourist activity were presented to each survey respondent (these differed between the two sampling locations). A brief description of the scenarios for each region is contained in Table 18 (for full details see Appendix 2). In the northern study, a potential and an existing operator in the region developed the scenarios to be explored. Representatives of the four Peninsula rūnunga helped us construct the southern scenarios, following consultation with their communities. Tourists were asked to rate the overall attractiveness of each scenario on a seven-point scale (where 1 = not at all attractive and 7 = very attractive). However, this scale was not used to its full extent because respondents who had no interest in the scenario were not asked to rate it. Given the bimodal distribution of the attraction items mentioned earlier, which indicate a propensity to make extreme judgements, one would expect that those who were interested

are likely to rate the scenarios relatively highly. Surveyors recorded the many comments respondents made explaining their interest (or lack of it) in the scenarios. These are discussed where they add to our understanding of the statistical data.

Table 18 presents the mean scores of the way in which international and domestic tourists gave each scenario and the number of respondents from each category.

Table 18 Overall attractiveness of scenarios for each of the two study regions

	Northern case study: East Cape – Te Urewera		International mean scores & response rates Total N = 182	Domestic mean scores & response rates Total N = 104
A	One-day sea fishing trip	Full day-trip with Māori guide and traditional seafood dinner	6 n = 101 (55%)	6.5 n = 35 (34%)
B	Two-day guided bush walk	Māori-guided bushwalk through pristine landscape, overnighting in huts	6.5 n = 68 (37%)	6.2 n = 43 (41%)
C	Four-day horse trek	Trek through tribal lands and national park with local guide, fishing, camping and marae stays	5.7 n = 72 (40%)	5.4 n = 28 (27%)
	Southern case study: Banks Peninsula		International mean scores & response rates Total N = 141	Domestic mean scores & response rates Total N = 58
A	One-day guided boat trip	Ocean wildlife viewing, Māori guide, visit marae, traditional lunch	5.0 n = 121 (86%)	5.2 n = 35 (60%)
B	Guided half-day hike of the historic peninsula food trails	Half-day Māori-guided hikes of the traditional food-trading routes	4.4 n = 103 (73%)	4.6 n = 31 (53%)
C	Traditional performance and hangī	Evening show including traditionally cooked hangī and performance by local culture group	5.5 n = 110 (78%)	5.2 n = 29 (50%)

Alongside rating the specific products for their overall attractiveness, respondents were asked to rate various content items for each scenario. These included:

- level of Māori content
- activity content
- length
- nature content
- cost

The only exception to this scale was Scenario C in the southern sample, where activity and nature content was replaced with a rating of

- entertainment content.

Respondents assessed each content item using a scale of ‘not enough’, ‘about right’ or ‘too much’. Responses indicated very little deviation from the ‘about right’ response option. For most items 85–90% of respondents rated the length, Māori content, activity and nature content in this way. Only those responses that deviated from this 85–90% agreement pattern are discussed here. Also, because people who professed no interest in the product were filtered from these responses, it is important to remember that the ‘about right’ rating comes from people who were attracted to the product rather than those more likely to be critical of it. Many of the negative verbal comments recorded came from people who professed no interest, and these provided some insight as to the reasons for lack of interest. Often, for example, the activities suggested in the particular scenarios were considered too long, contained too much Māori content, or the ‘wrong’ kind or amount of activity.

Our results show that domestic tourists are significantly more likely to be ‘not at all interested’ in these scenarios than international tourists, except for the fishing trip in the northern case study (Table 19).

Table 19 Comparison of the low interest reported by domestic and international tourists

Scenario	Uninterested internationals	Uninterested domestics	χ^2	P
Northern: fishing trip	99 (54%)	60 (58%)	0.40	0.529
Northern: 2-day hike	65 (36%)	60 (48%)	13.57	< 0.001
Northern: 4-day horse trek	70 (38%)	61 (59%)	11.42	< 0.001
Southern: boat trip	21 (15%)	24 (41%)	15.86	< 0.001
Southern: food trail	33 (23%)	28 (47%)	11.35	< 0.001
Southern: hangi /show	27 (19%)	30 (51%)	20.51	< 0.001

Note: χ^2 results all have one degree of freedom.

Response rates to the scenarios over the full sample varied such that the northern study response rates were substantially lower than the southern study ones, while the mean scores (see Table 19) for each scenario in the north were higher overall. This may have been partly a difference in approach between our two surveyors, as outlined in Section 3.2 (sampling). These differences may also arise from the differences in the scenarios used in the two areas.

The scenarios differed in the study areas in two substantial ways. First, the scenarios in the northern study area were generally longer in duration, including two-day and four-day scenarios, which may have affected the interest people showed in the products. Second, the content of the scenarios in the northern case was more specifically targeted at ‘particular activity interests’ such as fishing or horseriding than were those in the southern study area.

Combined, these differences may indicate that the northern study attractions are more suited to a particular subset of interested tourists. For example, for someone with no experience of horse trekking, a four-day experience may hold little attraction. To find such a trip attractive, tourists may well need some confidence in their ability to enjoy four days. That such products are more suited to a niche market may account for low response numbers but high ratings by those who have a clear interest in these attractions. For example, only 37% of participants rated the two-day guided bush walk, but those who did rated it attractively (mean 6.5). Scenario A in the southern study area produced a high response rate (86%) but the mean score was lower at 5. The niche market suggestions are supported to some extent by the comments made by respondents as they were surveyed about these scenarios. For example, 34 northern visitors reported a dislike of the sea or fishing (most of these were international). In comparison, 17 (mostly domestic) respondents reported loving fishing

while another 12 were highly enthusiastic about the trip in a more general sense. Others specified features such as the food, the scenery and the relaxation they expected to feel. Likewise, 38 visitors reported a dislike of horses,⁵ while 24 others reported either loving horses or loving the idea of a horse trek.

A relatively strong activity focus was revealed in the comments made about southern scenarios. So, for example, 12 people commented that the southern boat trip was attractive because of its nature content, while 30 people commented that they did not like the idea of a food trail because they did not like walking or could not walk for that long. Another 12 commented that they liked walking. This suggests that enjoyment of particular activities by individual tourists was a strong driver of interest in the scenarios.

Across the scenarios other than the southern hangi and concert, domestic visitors more frequently commented that they could do these activities for free by themselves or that they do these kinds of things anyway or that the cost was too great for them. Older visitors were much more likely than those in the younger age groups to comment that activities that required physical activity or a degree of fitness were not attractive to them.

Northern scenarios

While almost all respondents thought the nature content (99%) and the Māori content (96%) of Scenario A (the one-day fishing trip) were about right, approximately 18% rated it too long while 27% rated it as not having enough activity. Around 31% rated the cost of the trip too high. Nonetheless, this scenario received a high mean attractiveness rating of 6.

Only the cost variable in Scenario B (the two-day guided walk) was rated lower than 90% agreement. While most respondents reported that all other measures were about right, 18% of respondents rated this activity was too expensive and 21 respondents (mostly those who were not included in the ratings because they were not interested in the activity) commented the expense. These individuals generally suggested that 'it cost too much' or that 'hiking was something that could be done in New Zealand for free'. Nonetheless, of all scenarios presented, this one was rated most favourably (mean attractiveness rating = 6.5).

Responses to Scenario C (four-day horse trek) indicated a relatively high level of agreement with Māori content, nature content and activity level. However, around 22% of respondents rated the four days as too long, while almost half of all international tourists (47%) surveyed rated the trip was too expensive. In light of the indicated budget of this sample it is perhaps not surprising that price was a significant contributor to this rating, and may also be a significant contributing factor to its slightly lower mean attractiveness rating of 5.7 (Table 18).

Southern scenarios

Scenario A (one-day guided boat trip), produced high levels of agreement for four of the five areas measured and had an overall mean attractiveness rating of 5. Only the rating of cost deviated, and in this case around 52% of respondents felt the cost of the boat trip and hangi was too high.

Scenario B, the half-day heritage food trails, was generally rated as being about right, although around 14% of respondents commented that the food trails trip was *not long enough* and 11 people commented that they would prefer a full-day trip. Well over half (65%) rated the product as too

⁵ Extremes in response patterns are consistent with those reported earlier regarding the general attraction items.

expensive (and 29 individuals commented verbally to that effect). Around 26 people commented that they *prefer to walk alone* without a guide while 14 people commented that they *valued the small group* and the opportunities it offered for interaction with the guide. This scenario received the lowest mean attractiveness score of all of those presented, at a little over 4.

Interestingly, of all scenarios tested, Scenario C (the hangi and show at a marae) produced almost unanimous agreement with around 99% of respondents rating the length the Māori content and the entertainment as about right. Only 11% thought this attraction was too expensive. Eighteen respondents associated this activity with Rotorua, while a further 16 commented they had *done it already*.

Time limits

It appears visitors in the northern sample were less worried about time limits to their holiday than were visitors to the south. This may be because many tourists fly out of Christchurch and use Banks Peninsula as a day trip to fill in the day before they leave the country. In the northern area, visitors are further from the end of their holidays. Tourists in the south commented that trip length was an issue in all three scenarios there, whereas respondents in the north only made comments about time in the case of the four-day horse trek.

Contribution of scenarios to product development

From analysis of responses to these scenarios, several things became evident in relation to product development within these two markets:

- Cost of scenarios produced reactions in almost all cases and is clearly an important element in tourist judgement of these scenarios. Operators must carefully consider the cost of a given attraction for the potential market.
- The length of time a trip takes is also of some importance in making a trip attractive. The ideal trip length appears to vary between regions and by activity type, which indicates the need for market research on this aspect of the product.
- In both regions it seemed that tourists often did not see the value added by a guide in bush walk/hiking options. The ability to hike ‘alone’ and ‘for free’ was repeatedly mentioned in the comments, despite the fact that each scenario illustrated the value added by the guide sharing his/her extensive knowledge about the region. Such options must ensure that the value of the guide is made clear in terms that tourists understand and value.
- Little deviation in ‘about right’ responses was observed in relation to the Māori content within each of the six scenarios. This may be indicative of ambivalence on the part of the average tourist to seek out such experiences, or perhaps a lack of experience with Māori cultural products.
- Tapping into niche markets with ‘particular taste’ attractions (such as fishing trips and horse trekking) will need to be given thorough consideration. While responses to the northern scenarios produced higher mean scores, overall response rates were substantially lower, in some cases less than half. The sustainability of niche market products will largely depend on their ability to be patronised by enough tourists. For the northern study area, a thorough review of existing eco-cultural tourism businesses, and in particular niche markets, would be particularly advantageous.
- Finally, it appears that the markets differ by region, which might imply different approaches to product development and marketing are required in different places. There is a clear need to understand these regional differences better for tourism products across the board.

Drivers for eco-cultural tourism products

Thus far we have explored the range of ‘general attraction items,’ examined a range of scenarios and explored the factors that contributed to their relative attractiveness to potential tourists. In this section,

we explore the relationship between the general attraction items and the specific scenarios outlined above. We were particularly interested in finding out how tourists' levels of interest in Māori culture (high, moderate or low; see Section 3.5) correlate with their interest in the scenario products we have tested. We were therefore looking to see if a high interest in Māori culture is a driver for expressed interest in the scenarios. Added to this was an interest in how the other attraction items were correlated with the ratings of the different scenarios.

The bimodal nature of the responses to most of our attraction items means that the data presented some challenges for analysis. The bimodal distribution of responses to the attraction items also meant that many of the chi-square tests we ran had some cells with values less than five. However, the fact that the contingency tables still require interpretation means that chi-square tests can be used as a guide to find between-group correlations in distribution across two variables. Contingency tables are provided for all variables that showed a level of significance of around 95% or more in Appendix 3.

All attraction items *except* 'to enjoy natural landscapes' (because of its high popularity for nearly all respondents) were tested against interest in each scenario. All seven-point scales were collapsed to three-point scales where 1 and 2 were grouped to become a *low* attractiveness rating, 3, 4 and 5 were grouped to become a *moderate* attractiveness rating, and 7 and 8 became a *high* attractiveness rating. Interest in the different attractiveness items was then tested against the level of interest in each scenario using chi-square (χ^2) tests. The bimodal nature of the attraction items meant that in many cases interpretation of significance needed to be checked against the distributions seen in the cross tabulation of the two items.

Attraction items that showed some significance (χ^2) were then investigated further to see what differences the test was pinpointing between groups with a varying interest in the scenario in question. It is here that some care is needed in interpreting the levels of interest shown by tourists in these scenarios – mainly because some groups became quite small, particularly within the domestic sample. Some of this at least arose from the bimodal distribution of the attractiveness of the different items, which meant few data were to be found in the 'moderate' categories.

Presented below are tables showing the results of chi-square tests of scenario attractiveness ratings against attraction item ratings. We chose to present results for international *and* domestic tourists because we expected to see significant differences between them and both are used in marketing tourism activities and products. We note that while it is likely that useful information could emerge from looking at gender differences and age group differences in attractiveness ratings, the small size of our sample and the Māori cultural focus of our work mean we have chosen not to do that for this study.

Southern Case Scenario 1: One-day guided boat trip

There was a relationship between the southern boat trip scenario and interest in Māori culture, attending a hangī, and visiting a marae (Table 20). For each of the scenarios, a summary table is given to show the results of the chi-square tests for relationships between the attractiveness of the scenario and that of the attraction items. Relationships that showed significance are marked in the tables, e.g. at the 5% level ($P < 0.05$) by one asterisk; at the 1% level ($P < 0.01$) by two asterisks; and highly significant relationships at the 0.1% level ($P < 0.001$) by three asterisks.

Table 20 Summary: Southern Case Scenario 1: One-day guided boat trip

Attraction item	International		Domestic	
	χ^2	P	χ^2	P
To experience Māori culture	17.41	0.002 ^a **	23.94	<0.001 ^a ***
To visit museums	11.00	0.027*	8.26	0.082 ^a
To view dolphins or whales	5.0	0.288 ^a	5.10	0.277 ^a
To buy authentic NZ souvenirs	5.22	0.265 ^a	5.59	0.232 ^a
To try a traditional Māori feast (hangi)	14.19	0.007**	14.72	0.005 ^a ***
To go horse trekking	6.61	0.158	1.35	0.852 ^a
To go white water rafting	6.57	0.160 ^a	11.07	0.026 ^a
To visit a Māori meeting house (marae)	18.19	<0.001***	25.56	<0.001 ^a ***
To go mountain biking	1.66	0.798 ^a	2.42	0.659 ^a
To go on a scenic boat cruise	7.05	0.133 ^a	5.18	0.270 ^a
To find out about native plants and animals	0.45	0.978 ^a	2.55	0.636 ^a
To go hiking	5.49	0.240	0.39	0.983 ^a

Note: All attraction items have four degrees of freedom

^a Some cells in the contingency tables contained values less than 5

* $P < 0.05$; ** $P < 0.01$; *** $P < 0.001$

Somewhat counterintuitively, the attraction items ‘to view dolphins or whales’ and ‘to go on a scenic boat cruise’ showed no relationship with the attractiveness rating of this scenario. Table 20 shows the only three Māori cultural variables to show significant correlational relationships for both domestic and international tourists.

Looking at the contingency tables (Table A1, Appendix 3), it appears that domestic tourists with a low interest in the boat trip were also very likely to have a low interest in all three Māori attraction items. None of the Māori attraction items were strong drivers of interest (rather they appear to be more drivers of disinterest). Domestic tourists that reported a high interest in this trip scenario show no clear patterns in relation to the attractiveness of the Māori cultural items.

For the international market there is slightly more correlation of the three items with the ratings that individuals gave the scenario. Correlation is greatest at the low and moderate levels of attractiveness of both the scenario and the first two items. Individuals that rated the trip as highly attractive were quite evenly spread in the way they rated the attractiveness of these two Māori cultural attraction items. International travellers’ ratings of the attractiveness of the item ‘to visit a marae’ show some correlation with their ratings of attractiveness of this scenario.

Southern Case Scenario 2: Half-day guided walk of historic peninsula food trails

The half-day guided walk of peninsula food trails shows some very different patterns of significance between the domestic and international visitors in our sample (Table 21).

Table 21 Southern Case Scenario 2: Half-day guided walk of historic peninsula food trails

Attraction item	International		Domestic	
	χ^2	P	χ^2	P
To experience Māori culture	8.15	0.086 ^a	26.02	<0.001 ^{****}
To visit museums	7.26	0.123	13.62	0.009 ^{**}
To view dolphins or whales	1.76	0.780 ^a	1.68	0.794 ^a
To buy authentic NZ souvenirs	2.21	0.697	3.57	0.467
To try a traditional Māori feast (hangi)	5.29	0.259	13.18	0.010 ^{**}
To go horse trekking	4.83	0.305	11.12	0.025 ^a
To go white water rafting	9.87	0.043 [*]	10.90	0.028
To visit a Māori meeting house (marae)	11.55	0.021 [*]	40.58	<0.001 ^{****}
To go mountain biking	1.84	0.766 ^a	3.73	0.444 ^a
To go on a scenic boat cruise	2.55	0.636	3.78	0.436
To find out about native plants and animals	10.26	0.036 ^{a*}	2.46	0.351 ^a
To go hiking	26.61	<0.001 ^{****}	1.55	0.819

Note: All attraction items have 4 degrees of freedom

^a Some cells in the contingency tables contained values less than 5

* $P < 0.05$; ** $P < 0.01$; *** $P < 0.001$

The three Māori cultural items (to experience Māori culture, to visit a marae and to try a hangi) appear, once again, to be drivers of ‘disinterest’ for domestic tourists. The high number of domestic visitors who rated both this scenario and the attraction items as being unattractive appears to be driving the level of significance in the chi-square test. It appears that moderate interest in two of the Māori cultural attraction items may predict moderate interest in the scenario amongst domestic visitors. However, moderate interest is unlikely to attract people to actually do the trip. Furthermore, domestic visitors who rated the scenario as highly attractive do not necessarily rate the Māori cultural items as highly attractive. However, very few in the domestic sample rated the scenario or the Māori cultural items as highly attractive, so the data in this category cannot be regarded as highly reliable. All we can do here is point to the need for further research that targets domestic visitors who report an interest in Māori cultural tourism products.

The item ‘to visit museums’ does not appear to have any strong patterns that would indicate it as a driver of interest in Scenario 2. While it might indicate some kind of interest in history and cultural tourism in general, further research with a bigger sample of domestic tourists would be needed before we could say anything definitive about this possible relationship.

For international tourists the attractions items that indicate some kind of correlation with interest in this scenario are quite different to those that emerge from the domestic sample. It would seem that this scenario is being interpreted as less about Māori culture and more about the activity of hiking involved. There is a high level of correlation between reporting a high interest in hiking and a high interest in this scenario; however, the patterning for those with moderate or low levels of interest in this activity is less clear.

In our sample of international tourists people with a moderate to high level of interest in learning about native plants and animals did appear to have, overall, a little more interest in this scenario than

those with a low interest. It would certainly be worth thinking about how to market to people with an interest in walking and in flora and fauna.

The significance of correlation between the item ‘to go whitewater rafting’ (Table A4) appears to be mostly due to the fact that many people who reported a low interest in this scenario also reported low interest in white water rafting. Amongst those who reported high interest in this scenario there is no clear trend. The item ‘to go white water rafting’ therefore, does not appear to be a driver of interest in the scenario.

Overall then, for Southern Scenario 2, for domestic tourists the highest correlations appear to be a low level of interest in Māori cultural items with a low level of interest in the scenario. The item ‘to visit museums’ is also not a strong driver of interest in this scenario for domestic tourists. For international tourists the strongest driver appears to be a moderate to high attractiveness rating for ‘to go hiking’ and a moderate to high interest in ‘learning about native plants and animals’.

Southern Case Scenario 3: Traditional performance and hangi

Table 22 indicates that the traditional performance and hangi scenario appears to be associated mainly with the Māori cultural items.

Table 22 Southern Case Scenario 3: Traditional performance and hangi

Attraction item	International		Domestic ^a	
	χ^2	P	χ^2	P
To experience Māori culture	11.24	0.024 ^{a*}	32.63	<0.001 ^{***}
To visit museums	12.24	0.016 [*]	7.72	0.102
To view dolphins or whales	2.39	0.664 ^a	5.33	0.255
To buy authentic NZ souvenirs	12.13	0.016 [*]	8.51	0.074
To try a traditional Māori Feast (hangi)	23.80	<0.001 ^{***}	27.07	<0.001 ^{***}
To go horse trekking	3.39	0.495	3.28	0.513
To go white water rafting	5.11	0.276	13.35	0.010 ^{**}
To visit a Māori meeting house (marae)	13.63	0.009 ^{**}	15.55	0.004 ^{**}
To go mountain biking	1.22	0.875 ^a	4.03	0.402
To go on a scenic boat cruise	1.36	0.851	5.46	0.243
To find out about native plants and animals	2.65	0.617 ^a	2.92	0.571
To go hiking	3.73	0.444	4.17	0.384

Note: All attraction items have four degrees of freedom

^a Some cells in the contingency tables contained values less than 5

* P < 0.05; ** P < 0.01; *** P < 0.001

For domestic tourists it seems that, once again, all three Māori cultural items are more likely to predict disinterest, with the ‘low interest - low interest’ cells in all three contingency tables having more people in them than in any of the other cells. The items do not appear to be strong drivers of interest for domestic tourists. (Tables A5 and A6, in Appendix 3, provide cross tabulations of the significant items in Table 22).

The story is more complex for international visitors. It appears that international tourists who rated the performance and hangi scenario highly were more likely to rate learning about Māori culture, visiting

a marae, and trying a hangi as highly attractive than were people who rated the scenario as unattractive. However, it appears none of these attraction items are *strong* drivers of interest in this scenario.

Northern Case Scenario 1: One-day sea fishing trip

What is most striking for this scenario is the very small number of items that show any kind of trend towards a significant relationship with any of our attraction items (Table 23). Only one item came out as significant at the 1% level and this was only for international tourists in our sample.

Table 23 Northern Case Scenario 1: One-day sea fishing trip

Attraction item	International ^a		Domestic ^a	
	χ^2	P	χ^2	P
To experience Māori culture	7.14	0.129	6.31	0.177
To visit museums	11.81	0.019*	6.71	0.152
To view dolphins or whales	7.59	0.108	3.16	0.531
To buy authentic NZ souvenirs	8.47	0.076	1.92	0.751
To try a traditional Māori Feast (hangi)	9.07	0.059	6.51	0.164
To go horse trekking	3.53	0.473	4.49	0.344
To go white water rafting	7.4	0.103	5	0.287
To visit a Māori meeting house (marae)	8.62	0.071	3.74	0.443
To go mountain biking	2.06	0.725	5.69	0.223
To go on a scenic boat cruise	19.23	0.001**	6.92	0.140
To find out about native plants and animals	9.45	0.051	10.60	0.030*
To go hiking	0.77	0.943	7.27	0.122

Note: All attraction items have 4 degrees of freedom

^a Some cells in all the contingency tables contained values less than 5

* P < 0.05; ** P < 0.01; *** P < 0.001

Tables A7–A9 in Appendix 3 present the cross tabulations for the items highlighted in Table 23.

The attractiveness of museums for international visitors shows a slight positive correlation with the attractiveness of the one-day sea fishing trip. It is possible that interest in New Zealand culture and perhaps natural history may be a partial driver for some individuals. This is supported by the comments some individuals made about their interest in visiting White Island.

International tourists with a high interest in the one-day sea fishing trip from the northern case study were more likely to rate ‘to go on a scenic boat cruise’ as highly attractive.

The ‘to learn about native plants and animals’ attraction item shows quite different patterns of interaction with the scenario between domestic and international tourists. For all tourists a relatively large number of people who rated the full-day sea fishing trip as unattractive also rated learning about native plants and animals as unattractive. International tourists who rated learning about plants and

animals moderately or highly were slightly more likely to rate the sea fishing scenario as moderately or highly attractive. However, in comparison, domestic visitors who rated the sea fishing trip as highly attractive were more likely to rate ‘learning about native plants and animals’ as of low attractiveness. This item is not a strong driver of interest in this scenario for either group.

Northern Case Scenario 2: Two-day guided bush walk

Table 24 indicates a large number of attraction items show some kind of relationship or potential relationship with the two-day guided bush walk scenario.

Table 24 Northern Case Scenario 2: Two-day guided bush walk

Attraction item	International ^a		Domestic ^a	
	χ^2	P	χ^2	P
To experience Māori culture	8.95	0.062	4.77	0.312
To visit museums	17.54	0.002**	17.74	0.001**
To view dolphins or whales	6.39	0.172	9.19	0.057
To buy authentic NZ souvenirs	15.39	0.004**	0.89	0.926
To try a traditional Māori Feast (hangi)	9.36	0.053	5.82	0.213
To go horse trekking	11.34	0.023*	10.90	0.028
To go white water rafting	19.75	0.001**	4.24	0.374
To visit a Māori meeting house (marae)	8.91	0.063	2.63	0.622
To go mountain biking	38.60	0.001**	9.11	0.058
To go on a scenic boat cruise	20.27	0.001**	11.00	0.027*
To find out about native plants and animals	12.54	0.014*	6.25	0.181
To go hiking	46.67	0.001**	13.16	0.011*

Note: All attraction items have four degrees of freedom

^a Some cells in all the contingency tables contained values less than 5

* P < 0.05; ** P < 0.01; *** P < 0.001

Tables A10–15 (in Appendix 3) provide the contingency tables for the variables that appear to be important in Table 24.

Table 24 reveals some linear correlation between the attraction item ‘to visit museums’ and this scenario for international visitors although the bimodal nature of the ratings for both visiting museums and this scenario means no individuals ranked both moderately. An interest in museums may indicate a general interest in New Zealand natural history and culture. The relationship is less clear for domestic visitors. Whereas many ranked both visiting museums and a two-day guided bush walk as being of low attractiveness, the patterns for New Zealanders with a high level of interest in the guided walk are not at all clear. Once again, the attraction item for domestic visitors appears to be better for indicating a lack of attraction than a high level of attraction.

The linkage between the attraction item ‘to buy authentic New Zealand souvenirs’ and this scenario is difficult to explain. It appears that international visitors who ranked this scenario low on the attractiveness scale were also fairly likely to rank buying souvenirs as low in attractiveness and very unlikely to rank it highly. For those that ranked the scenario highly, there was a fairly even spread in interest in buying souvenirs.

The three attraction items tabulated above show some reasonable correlation with the attractiveness of a two-day guided walk. The international visitors who were interested in this scenario also seemed interested in active outdoor pursuits and perhaps adventure activity. It appears that this item drives interest amongst domestic tourists also. Domestic visitors with a moderate to high level of interest in the scenario were more likely to rate this item highly. While international visitors appeared more likely to correlate this scenario with the attraction item of going on a scenic boat cruise, it would seem that domestic tourists are unlikely to be highly attracted to either.

The main reason interest in finding out about native plants and animals produced a significant relationship with interest in the two-day bush walk is the very different distribution of those few individuals who ranked the scenario as moderately attractive. Given the highly bimodal distribution of attractiveness items and of the scenario itself, interest in plants and animals does not appear to explain international visitors' interest in this scenario.

In summary international and domestic visitors who showed an interest in this scenario appear to be interested largely because of its outdoor activity and experience focus. For New Zealanders this is linked slightly to an interest in hiking, whereas for overseas people it is linked more with the range of outdoor activities that people try when they visit New Zealand.

Northern Case Scenario 2: Four-day horse trek

The attractiveness of this scenario would appear, like the last one, for international tourists at least, to be driven by activities with a strong outdoor and environmental focus. Perhaps surprising is the low significance of the relationship between the horse trekking attraction item and this four-day horse trek scenario for international visitors (Table 25).

Table 25 Northern Case Scenario 3: Four-day horse trek

Attraction item	International		Domestic	
	χ^2	P	χ^2	P
To experience Māori culture	3.75	0.441	15.87	0.003 ^{***}
To visit museums	5.12	0.275	6.90	0.141 ^a
To view dolphins or whales	6.61	0.158	15.61	0.004 ^{***}
To buy authentic NZ souvenirs	6.68	0.154	2.65	0.619 ^a
To try a traditional Māori Feast (hangi)	4.25	0.373	16.64	0.002 ^{***}
To go horse trekking	10.95	0.027 [*]	32.10	<0.001 ^{****}
To go white water rafting	10.18	0.037 ^{a*}	8.74	0.068 ^a
To visit a Māori meeting house (marae)	3.56	0.469	9.11	0.058 ^a
To go mountain biking	30.54	<0.001 ^{***}	10.82	0.029 ^{a*}
To go on a scenic boat cruise	19.06	<0.001 ^{***}	11.85	0.018 ^{a*}
To find out about native plants and animals	17.92	<0.001 ^{***}	9.51	0.050 ^{a*}
To go hiking	33.83	<0.001 ^{***}	11.13	0.025 [*]

Note: All attraction items have four degrees of freedom

^a Some cells in the contingency tables contained values less than 5

* P < 0.05; ** P < 0.01; *** P < 0.001

Tables A16–19 in Appendix 3 indicate that many of these relationships are real and provide us with information that helps us understand how people are judging the attractiveness of this scenario. The tables also raise significant questions.

Both international and domestic tourists who rated this scenario as highly attractive were more likely to rate mountain biking as highly attractive and those who rated it as unattractive were also more likely to rate mountain biking as unattractive. The trends are less clear for domestic tourists than for international tourists.

While the relationship between a horse trek and a scenic cruise is difficult to explain, it seems that within our sample, those international tourists who ranked the scenario highly were more likely to rank the attractiveness of going on a boat cruise highly. For domestic tourists, the trend was the opposite with people who ranked the attractiveness of the scenario as low or moderate being more likely to rate the attractiveness of a boat cruise as low or moderate too.

While the horse trek scenario showed a highly significant relationship with the attraction item ‘to find out about native plants and animals’, particularly for international visitors, this attraction item does not appear to be a strong driver of attraction for the scenario. While we could argue that international tourists with a high interest in the scenario are a little more likely to be interested in native plants and animals, the trend is not particularly striking. Furthermore New Zealanders who rated the scenario as highly attractive were most likely to rate ‘finding out about plants and animals’ as unattractive. At the same time, New Zealanders who rated the scenario as unattractive also rated finding out about native plants and animals as unattractive.

While there are no clear patterns of correlation for international visitors who rated the four-day horse trek scenario as being low or moderate in attractiveness, those who rated the scenario as highly attractive were much more likely to rate hiking as highly attractive. In comparison, domestic visitors who rated the horse trek as moderately attractive appear to rate hiking as highly attractive and certainly the greatest number of domestic tourists who rated the scenario as highly attractive also rated hiking as highly attractive. While the pattern is not strong it perhaps indicates that tourists expect this scenario to provide some of the same pleasures that walking or hiking provide.

If all else is equal, this scenario might be expected to correlate well with the way individuals rated the attractiveness of going on a horse trek. This appears to be the case for New Zealanders, where there is evidence of a reasonable linear correlation. However, amongst international travellers, the case is not so clear cut. While those who ranked the scenario as unattractive also were most likely to rate ‘to go on a horse trek’ as unattractive, nearly half the people who rated the scenario as attractive had rated horse trekking as unattractive. Clearly, this four-day horse trek is seen to be providing something over and above horse riding.

The attractiveness of this horse trek scenario is not strongly driven by the attractiveness of experiencing Māori culture or of trying a hangi. While the Māori culture and hangi items do not appear to be the strong drivers of disinterest that they were in the southern case scenarios, they are clearly not drivers of interest in this scenario for domestic tourists and they do appear to drive some of the unattractiveness ratings.

The attractiveness of viewing dolphins or whales seems a very unlikely driver of the attractiveness of this scenario and in fact it is clear that this is not the case. While many individuals did rate both as being unattractive and there is some correlation between those who ranked both the item and the scenario moderately, those who rated the scenario highly were more likely to have a low or moderate attraction to watching dolphins or whales. This may well reflect a lack of interest in relatively expensive commercial activities.

The correlations between the rated attractiveness of white water rafting for international tourists and that of this scenario were not highly significant. It does appear that those who rate the scenario highly are also more likely to rate white water rafting as attractive, and a significant group rated both as being of low attractiveness. This coupled with the observation that there are significant relationships with a wide range of outdoor activities may support the idea that international visitors interested in this scenario are interested in trying a range of new things as part of their trip away from their home countries.

Discussion

As we began this survey, we aimed to understand how tourists might engage with, and assess, Māori eco-cultural tourism products. The survey shows that some international tourists had an interest in Māori cultural attractions; however, interest in Māori eco-cultural tourism appears to be driven more by the fact that such products involve outdoor activities such as boating, walking and horse trekking rather than by the Māori content or indeed by the 'eco' or nature content. Learning about native plants and animals was not a highly significant driver of interest for any of the scenarios and, if anything, played a slightly lesser role than interest in things Māori. This finding is also worthy of further research, however, and may be a reflection of the ways in which we tested interest in nature-based tourism. The verbal comments about interest in seeing White Island, an active volcano, indicates there is more to nature-based tourism than simply native plants and animals.

Domestic tourists appeared to have relatively little interest in the scenarios that we presented to them or in the Māori cultural attraction items, but this must be put in context. An observation that arises from their comments and interest in the range of attraction items we gave them is that domestic tourists are not as attracted to many of the things international tourists are attracted to, and they are less interested, or perhaps less able to afford, to participate in commercial tourism products when they are on their holidays.

It does appear, as Ryan (2002) has suggested, that New Zealanders interact with Māori culture with a different set of knowledge, feelings and understandings than those of international visitors. It seems, both from comments made by visitors to our interviewers and in the ways domestic tourists rated attractions that highlight Māori culture, that the inclusion of Māori culture may actually put New Zealanders off. This observation raises a raft of questions about how New Zealanders form their understanding of and interest in Māori culture.

Questions we have pondered since the beginning of this project are what does Māori tourism mean to non-Māori New Zealanders and would they be interested in cultural products in other situations than when on holiday? How do New Zealanders interested in learning more about Māori culture choose to do that and how do they perceive the idea of learning about it in a tourism setting? For example, some non-Māori New Zealanders undertake to learn the Māori language and in many cases this is a 'serious' leisure activity. It would be interesting to know how these people assess and engage with learning about Māori culture in a tourism framework. Conversations amongst a small number of people who have a proven interest in learning about Māori culture indicate they would not want to 'purchase Māori culture' as part of a commercial tourism activity. They feel that such tourist centred activity is unlikely to provide them with the sort of experience they want. An untested question exists around whether such people would be interested in visiting a marae or participating in cultural learning in some other context such as adult or worker education.

The Māori cultural tourism markets differ between the two areas studied, as shown in their different ratings of general items of interest. This difference, in part, could be attributed to two factors, a

‘regional effect’ and a ‘previous experience effect’. Consistent with the assertions of McIntosh (2004) and Ryan and Huyton (2000) we would argue that there is potential for increased success with closer proximity to the high tourist flow areas. In the northern study area, current and potential operators may be able to more readily establish Māori cultural businesses that are able to ‘piggy back’ on or be clustered around existing operations, thereby drawing on the benefits of this regional effect. Of course this introduces the possibility that businesses of a low standard may miss out because of competition.

In the case of development of Māori cultural tourism ventures in the northern region, proximity to Rotorua and surrounds may offer some advantage. However, this must be understood in the context of the ‘previous experience’ effect. Respondents to this survey indeed indicated that the Rotorua region is readily identified as being ‘the place’ where Māori cultural consumption occurs. This belief may indicate of a sort of ‘checklist’ governing decisions international tourists make about the kinds of experiences they are seeking while in New Zealand. Put in their words – *Once I’ve done that thing, I’m not sure I need to do it again and again*. This would indicate that Māori eco-cultural businesses may well be competing with more traditional attractions for customers. This means that interpreting the effect of the regional effect on new businesses is difficult – it could be an advantage but it could also be a disadvantage.

In the southern case study area, drawing on the ‘regional effect’ argument is again helpful. Responses to the general attraction items revealed a greater interest in nature-based tourism (as defined by ocean mammal watching and learning about native plants and animals) than in Māori cultural items. In the absence of the strong Māori cultural drawcard (and in the presence of the strength of nature-based tourism as the driver for international visitation to New Zealand as a whole) focusing on the ‘eco’ part of eco-cultural tourism products and experiences may be a prudent first step to industry development in the southern region. Again, we reiterate what tourists indicated, *[elsewhere] is where Māori cultural tourism is done*. As a key finding we would suggest that this research has illustrated the potential strength of a region’s image in influencing tourism decision-making behaviour.

During the scenario-testing phase of this research it became clear that interest in scenarios on the part of the northern tourists was more clear-cut than their southern study counterparts. Compared with the south, northern response ratings were lower (indicating that a larger proportion of the sample were not interested in the scenarios), yet overall scores were higher. In other words, fewer tourists showed interest in the scenarios, but of those that did, their interest was high. This has clear implications for industry development. For example, it could be argued that in the northern study area the scenarios developed for testing were somewhat more ‘niche’, or indicative of a particular ‘taste’, than the southern study scenarios. Likewise, the products tested in the northern study were generally more demanding or active, again potentially of interest to a smaller subset of tourists. In contrast, the southern study scenarios provided by local Māori collaborators were perhaps more generic, and had a wider appeal. Tourists reflected this in the rates and levels of response to these scenarios. At any rate, the kinds of scenarios developed by potential operators suggest a level of maturity of the respective markets into which current and future operators are entering. Nonetheless, to maximise benefit from the clustering of Māori cultural businesses, the future development of the eco-cultural tourism industry (particularly in the north) will be dependent on a thorough understanding of the current market as well as the kinds of tourists seeking out ‘niche’ attractions.

In the southern study area, there is no established Māori cultural tourism market. This leads us to revisit our initial broader aim, namely, to increase foreign exchange earnings by developing regional tourism products with iwi. It may well be that in the southern study area, developing tourism and building capacity in this sector will emerge via ‘Māori in tourism’ over and above the development of specific ‘Māori eco-cultural tourism’ experiences. Growth in employment and/or the provision of tourism-related goods and services that may not necessarily have an explicit cultural component may

be the most logical path, in light of the earlier stated potential of a regional effect contributing to decision making on the part of the tourist. To this end, the efforts of potential Māori tourism developers in the southern study area may be best expended in 'eco' based tourism pursuits (sympathetic to the identified interests of the participants surveyed) in the first instance. We do ask the question, however, 'Is the opportunity ripe for southern operators to move Māori tourism beyond the stasis currently binding traditional images of Māori?' The absence of a strong cultural regional effect may benefit potential operators by making way for the incorporation of a more contemporary definition of culture, in the development of new eco-cultural tourism ventures.

The potential remains to capture those international tourists who choose the South Island as their gateway into New Zealand as well as those who never intend visiting the North Island (Becken 2004). In light of the potential absence of a previous experience that might characterise this cluster of international tourists, this group offers a new and interesting challenge for the southern study operators who remain intent on developing Māori eco-cultural tourism experiences. Hence, further research into the breadth of interest in Māori cultural and/or eco-cultural tourism attractions and experiences may well be of benefit. While the measures engaged to understand levels of interest in Māori culture and attractions produced exceedingly high levels of inter-item correlation, we would support a more in-depth exploration of the extent of what tourists seek in a Māori cultural experience. One logical first step should be examination of the breadth of the 'value added' component of Māori culture, as part of the wider Māori eco-cultural tourism experience (see Section 4 Qualitative Interviews).

Another aspect of the regional effect is the very different patterns of travel that occur in the northern and southern areas. As a reflection of the pattern of travel from north to south outlined above, many international tourists travel to Banks Peninsula as a way of filling in a day or two before they leave the country. As such, most people travelling in the south made their decision to visit the southern study area while travelling within New Zealand. In comparison, people travelling in the northern area planned to do so before they came to New Zealand.

This pattern is reflected in the different kinds of information used by people in the two areas. For tourism businesses in the north, this means marketing effort should be focused on sources of information like websites and guidebooks that international visitors can access from their home base. For tourism businesses in the south, putting effort into information sources that people can use within New Zealand, such as talking to information centres around Canterbury and providing brochures for people to pick up as they travel, makes more sense. A pertinent observation is that in the south, both domestic and international visitors are using a wider range of information to find out about the region than their northern counterparts. This may arise from a difference in approach between our two interviewees, but it may also arise from the fact that the decision to visit the northern case study area was made some time before the tourists arrived in the area to be questioned and they were unable to easily recall what information they used. In comparison, in the south, the need to fill in some time can get visitors searching for new information just before they enter the region, so they are more readily able to recall when questioned the information that they used. This is another thing that could be elucidated with qualitative interviewing of tourists in the two areas.

While the study has uncovered some interesting points, this analysis has also generated many questions. We now have some methodological questions around the ways we ask tourists to assess the products they choose to buy. It seems, for example, that in many cases, the attractiveness of a product is an all or nothing affair that is a relatively instant and emotion-based process (as are many of our decision processes in everyday life). Asking people to assess attraction across a seven-point Likert scale may not have been the best way to assess interest in a product given that it appears that for most tourists the decision is about whether they would participate or not – an all or nothing assessment. Our

assumption was that attraction might be measured in terms of a continuum has been brought into question.

The centrality of price is something we did not test adequately and which needs greater thought in future work. Many tourists are on a tight budget (both timewise and financially), so products have to be highly attractive for them to put aside the time and spend the money. The verbal comments that people made indicated a high level of price consciousness. On reflection, it would seem that even a moderate interest in something is unlikely to convince tourists to part with their money and time, without some other added incentive or driver. However, a product does not need to be highly attractive to large numbers of people. Horse trekking, for instance, was rated as low in attractiveness by many of our respondents, and yet there are many successful horse trekking businesses that cater for the minority group who do find the activity highly attractive.

The commercial activity frame appears to be particularly an issue for domestic tourists. Many domestic tourists in this survey rated attractions that were likely to be commercial activities as low in attractiveness. Discussions with tourism operators in Rotorua and Kaikoura highlight the fact that the people who participate in commercial activities are predominantly international tourists. Many New Zealanders participate in activities such as mountain biking, horse trekking, and tramping (hiking) but seldom would this involve paying for a guide or even for access to facilities. This cultural norm may well be an influence in the assessment that domestic tourists make of scenarios.

Another aspect to this inclination to avoid commercial activity that is more likely to influence New Zealanders than international tourists is that many domestic tourists are travelling with family groups, which can make it much more expensive to participate in commercial activities. The high prevalence of comments about the cost of these scenarios amongst those who had no interest in the product would provide some support for this hypothesis.

There are also questions around the way tourists assess complexity. That some tourists ranked horse trekking as low in attractiveness but then ranked a scenario that involved four days of horse trekking very highly indicates there is much more going on in the assessments that tourists make. Only careful qualitative exploration of this process will be able to shed light on this process.

4. Qualitative Interviews

This part of the research project followed on from the quantitative research reported in Section 3. This part of the research explored in more detail how tourists actually experience Māori culture through their tourism experiences in New Zealand. It also addressed several of the issues identified in the literature review that challenge research into cultural tourism demand. Chief amongst these issues is the question of what are considered 'cultural tourism experiences' by the tourists themselves?

In previous research an interest in learning about, and experiencing, Māori culture through the consumption of tourism has often been expressed. However, since the tourists surveyed had not necessarily experienced any Māori tourism products it was difficult to link this with any specific products. This interview research therefore aimed to bridge the gap between 'expressed' interest and 'actual' experience by observing tourists while they were on Māori tourism experiences and interviewing them after the experience was completed. It looked at those experiences in relation to a wide range of products, many of which were not considered by tourists to be 'cultural' products; as reported in the literature review, a wide range of Māori cultural tourism products, with varying degrees of cultural content and intensity, are offered to tourists in New Zealand.

Objectives

The specific objectives of the interview research were to gain greater understanding of tourist experiences of Māori cultural tourism products. In particular, the ‘value added’ to tourism experiences by Māori cultural components was examined. ‘Value-added’ was explored across core mainstream tourism experiences and products, not just those that were recognisably Māori. This allowed for greater understanding of how tourists experience ‘cultural’ tourism and of what they perceive ‘culture’ to be in a broad sense.

The specific research questions addressed were:

What attracts tourists to Māori tourism products?

How is Māori culture experienced within those products?

Is there a difference between experiences of traditional and contemporary culture?

How do they value those experiences?

In the context of their other tourism experiences in New Zealand

In the context of other tourism experiences generally

What is the value-added to core mainstream products by Māori components?

Methods

Case study areas

Two case study areas were used, similar to those described in the research reported in Section 3. In order to satisfy the research objective of interviewing tourists after they had experienced a Māori cultural tourism product these areas were extended geographically. The North Island case study area was extended to include several tourism products available in Rotorua (see Figure 1). In the South Island, because the original case study area did not offer any suitable Māori cultural tourism products, three products and locations were chosen based on their cultural content and geographic proximity; one of these was in Christchurch and two in Kaikoura (Christchurch is on the boundary of the southern case study area whilst Kaikoura is a popular tourist destination located approximately 180 kilometres to the north of Christchurch).

Tourism experiences

The nine tourism experiences used are shown in Table 26. These covered a range of tourism experiences with many offering multiple cultural components: traditional performances (Te Puia, Ko Tane), hangi (Ko Tane, Eastenders), Māori arts and crafts (Te Puia, Eastenders), cultural information or marae visit (Māori Tours, Te Puia, Ko Tane), Māori-guided experiences (horse trekking at Eastenders and Te Urewera Adventures, rafting with Kaitiaki Adventures, Whale Watch), Māori-operated transport or accommodation (Ahurei Adventures, Te Kaha Lodge, Eastenders). All were Māori-operated businesses and the majority had some eco- or nature component.

Interviews

In total 31 in-depth interviews with 53 tourists were conducted in the two case study areas; 16 in the North Island, 15 in the South Island (Table 26). The interviews were conducted by two different researchers, one in each case study area, although in the early part of the research project, in order to standardise interview content and to minimise interviewer bias, the two interviewers worked together over a weekend in the East Cape area.

Table 26 Tourism products and locations

Tourism product & location	Type of experience	Interviews (no. of tourists)
North Island		
Te Kaha Lodge, Te Kaha	Māori-owned backpackers/lodge	4 (5)
Eastenders Farmstay, Rangitukia	Farmstay offering horse treks, bone carving, and hangi	2 (2)
Te Urewera Adventures, Ruatahuna	Overnight horse treks	2 (6)
Ahurei Adventures, Ruatahuna	Shuttle and hunting experience in Te Urewera National Park	1 (2)
Kaitiaki Adventures, Rotorua	White water rafting on the Kaituna River	3 (3)
Te Puia, Rotorua	Guided tours of geothermal area and Māori arts and crafts institute, and cultural show on a marae	4 (8)
South Island		
Whale Watch, Kaikoura	Māori-owned and operated eco-tourism business	6 (10)
Ko Tane, Christchurch	Evening cultural performance, kiwi viewing, and hangi	6 (13)
Māori Tours, Kaikoura	Cultural tour of local area with nature walk	3 (4)
Total interviews (number of tourists)		31 (53)

The tourists interviewed had participated in a range of tourist experiences that had varying degrees of cultural component. Preliminary investigations of each experience, through informal interviews with owner/operators (and from other cultural tourism research) suggested that the amount and presentation of cultural content could also vary within each experience. Because of this the researchers went on the experiences prior to interviewing participants⁶. This also allowed some participant observation of tourists and informal contact with guides and hosts. At several places operators/hosts also made visitors books and customer-survey information available to the researchers.

The interviews were semi-structured and while the exact questions asked varied across interviews the same general areas were covered. Interviews began with questions about the experiences participants had just been on. They were then asked if they had had any other cultural tourism experiences in New Zealand and how these compared with what they had just done. General questions were then asked about what they expected from cultural tourism experiences, what they enjoyed, what they disliked, what they were interested in, and so on. Often considerable probing had to be used to elicit specific information about experiences of cultural tourism, and the discussion centred around more general tourist experiences of New Zealand. Interviews concluded with explicit questions about the Māori component of their experiences; tourists were asked about 'value added' to experiences by cultural content, the price of trips, authenticity of experiences, the role of guides, group sizes etc.

Interviews were recorded and transcribed individually by each researcher. At various times throughout the research project the two researchers talked through their findings to identify similarities and differences between the research areas and data gathered. The interviews were then analysed according to common themes that emerged. Each case study was individually written up and merged to form this report.

⁶ The exceptions were Te Urewera Adventures and Ahurei Adventures. In the first instance, it was not practical to accompany tourists on the overnight horse trekking trip. In the second, the hunting trip was actually led by an overseas guide, but the researcher travelled on the Māori-operated shuttle into the area with the tourists.

Participants

Altogether 26 people were interviewed in the North Island (13 males) and 27 in the South Island (14 males). While no specific details were recorded on those interviewed they can be described by basic demographic characteristics of age, nationality and type of travel.

Their ages ranged from late teens to 60s across both case study areas. To some extent age could be differentiated according to the nature of the experience being visited. In the North Island, for example, those rafting and those travelling on the Kiwi Experience backpacker bus (interviewed at Te Kaha Lodge and Eastenders) were younger. Overall, however, age did not specifically determine participation in experiences; in the South Island, for example, a wide age spread was interviewed at each of the three locations.

The majority of tourists interviewed were from the traditional tourism markets to New Zealand; the United Kingdom, Australia, North America and Europe (Table 27). Only one tourist interviewed was from Asia. Those interviewed in the North Island were from a wider range of origin countries, particularly Europe. Also, although the focus of the research was on international tourists, two New Zealanders were interviewed in the North Island. This was because they had been on a small group experience and all participants were involved in the post-trip interview.

All tourists interviewed were free independent travellers (FIT); none were on tours. In both islands there was a mixture of transport modes used with some travelling in hired campervans or rental cars, some on the organised backpacker bus network (Kiwi Experience), and some on public transport or in private cars.

Table 27 Nationality of interview participants

Nationality	North Island	South Island
UK & Ireland	12 (10 UK, 2 Irish)	16 (all UK)
Australia	3	4
North America	3 (2 American, 1 Canadian)	4 (all American)
Europe	6 (3 Danish, 2 German, 1 Swiss)	2 (Dutch)
Asia		1 (Singapore)
New Zealand	2	
Total	26	27

Three of those interviewed on each island were visiting friends and family, one in the North Island and four in the South Island were on working holidays in New Zealand, while one in the North Island was on a student exchange. The remainder were on holiday.

The younger tourists were usually travelling for longer, particularly the working holiday makers and the one in New Zealand on a student exchange. Often their travel in New Zealand was combined with other destinations as part of a round-the-world trip. Their focus was on 'seeing' and 'doing' as much as possible while travelling. Some of those visiting friends and family were in New Zealand for several months. These tourists, however, spent more time 'at home' and doing local activities with those they were visiting. The others were travelling relatively quickly around New Zealand, usually for around three to four weeks. Some were touring generally while others combined this with a specific purpose for at least some of their trip (such as those on the hunting trip, horse trekking, or those spending part of their holiday visiting friends and family).

Results

It was not the intention of this research to report on the specific products experienced by the tourists; these were used as a basis from which to explore tourists' engagement with culture through tourism. A substantial amount of the data collected was on cultural tourism experiences in New Zealand in general. Combined data from both research areas are reported and, apart from obvious differences in experiences from products with differing cultural content, the only occasion any differentiation is made is when differences were found between case study areas. This following sections report the key findings from interviews under three broad areas of interest:

- The general tourism experience in New Zealand. This covers the 'attractions' of New Zealand, the primary drivers for the tourists' visits to New Zealand, along with the activities and experiences chosen while travelling in New Zealand. A second theme explores the tourists' perceptions of themselves as tourists – their awareness of being 'tourists'.
- The Māori cultural tourism experience in particular. The consumption of cultural experiences is explored in three parts: first their experiences of Māori cultural tourism; second how this experience is 'mediated' for them; and lastly how they engage with contemporary Māori culture.
- The 'value added' to the tourism experience by Māori cultural components.

General tourism experiences

The 'attractions' of New Zealand

For all those interviewed 'seeing' the scenery and to a lesser extent nature (both flora and fauna) were the key attractions of New Zealand. Older visitors were generally more interested in experiencing scenery through soft adventure and passive viewing while younger visitors (those in their teens and twenties) focused on a combination of scenery and participation in adventure activities. A number of visitors mentioned the diversity and accessibility of scenery and activities in New Zealand: *It has everything. Culture, friendly people, things are accessible, and it's smaller – easier to get around and see things in shorter amounts of time.*

Visitors often had a list of places they wanted to see and things they wanted to do while in New Zealand. For many tourists adventure activities were 'once only' experiences; after participation the activity was 'ticked off'. As one tourist said, *I didn't have to do a sky dive in Taupo because I had done one elsewhere.* In some instances visitors had done an activity overseas and therefore felt they did not need to do it in New Zealand, *I have seen mud pools and geysers in South America so they weren't such a wow factor.* Another tourist did not 'do' the glaciers *because I had done that in Canada.* On the tourist circuit an informal information network appeared to operate, particularly amongst younger tourists, which could determine where the best places to do different activities were. As one tourist said, *I want to go skydiving in Taupo – I've heard it's better and less expensive than Queenstown.* Some activities, however, either had a strong association with particular locations or were only available in specific locations. One visitor was adamant that she *wanted to swim with the dolphins and whale watch in Kaikoura.* Often wanting to visit particular locations was linked with participation in specific activities, as one said about the horse trek they had chosen, *the key reason we chose it [the horse trek] was because it was in Te Urewera National Park and it was an overnight trip.*

While many of the adventure activities available to tourists in New Zealand are 'soft', in that they require no prior experience or knowledge, some niche products would not be chosen without some prior experience. This was the case with the hunting trip in the North Island; the tourist was a keen hunter and a key attraction of New Zealand for him was the opportunity to hunt. Interestingly, however, those who went on the overnight horse trekking trip were not very experienced riders, but

rather had chosen the trip because they wanted to see the countryside through which the trek travelled. Those who rode while on the East Cape did it because it was another activity to ‘tick off’. They did, however, recognise that it was a *special* experience as they were able to gallop their horse along the beach, something inexperienced riders would not normally be able to do. Often these types of activities were also associated with wanting to get off the beaten track into more remote, less touristy areas. Personal interest also determined repeated participation in some activities; one tourist, for example, had been kayaking on Lake Taupo, in the Abel Tasman National Park, at Mount Cook, and at Milford Sound.

All the visitors interviewed were interested in seeing and experiencing something of New Zealand culture although this was not a primary reason for visiting New Zealand. When asked about experiencing Māori culture in general one tourist replied that it was *not what I came to see but it would be interesting if I had time*. Time was an issue with many of those interviewed and many were on relatively tight schedules. Those on shorter trips had more of their holidays preplanned and were very clear on their lists of things to do in New Zealand. One couple interviewed in the South Island, for example, had only been able to *fit* Whale Watch in because they had a *spare day* after bad weather had prevented them doing the Tongariro Crossing earlier in their trip.

Visiting a Māori cultural show was on most of the tourists’ lists of things to do and was perceived as a tourist experience similar to other activities in New Zealand. It was something that was usually done only once: *I went to a Māori cultural experience in Queenstown... I wasn’t interested in seeing another one here [in Rotorua]*. Māori cultural shows were strongly associated with Rotorua; some of those travelling on Kiwi Experience reported being *told by the bus driver that Rotorua was the cultural capital of New Zealand*. Many of those interviewed, when asked specifically about visiting Rotorua, however, were attracted by it being a geothermal area; Māori culture was a subsidiary interest. Māori culture, however, was mentioned more often (and rated more highly as a Rotorua attraction) by interviewees at Te Puia, in other words by those who had just participated in a strongly Māori experience and one that is marketed strongly as Māori.

The South Island interviews showed that having a South Island option of a Māori cultural show was important for those not visiting the North Island; all but one of those of those interviewed at Ko Tane, for example, were *only* visiting the South Island. Several of those interviewed after other experiences, however, were not interested in visiting a cultural show in New Zealand because they had done similar things in other countries. As one said, *We have been to a performance/hangi type evening in Hawaii, and elsewhere in Polynesia, so didn’t need to do it here*, although in one instance seeing a cultural show in Hawaii had heightened interest in seeing a cultural show in New Zealand.

Younger tourists appeared to be interested in Māori culture, but at quite a superficial level, whilst older ones showed interest in learning more in-depth information about history and culture in New Zealand. Although Māori culture was mentioned as something that made New Zealand unique, interest in culture and history was not limited to Māori culture and many expressed interest in New Zealand culture and history in general. One visitor, for example, *Wanted to do research on Cornish settlement in New Plymouth*; others expressed interest in museum displays of settler/Pākehā history and other historical places of interest such as old gold mining areas. Again, it often it came down to personal interest: one tourist said, *we always try and see the culture of the countries we go to – like going to museums and that*, another said, *I don’t go to museums at home so why would I here*.

‘Tourist’ experiences of New Zealand

Overall New Zealand was seen as a friendly, laidback, and safe country in which to travel. Some commented that New Zealand was very well equipped to deal with tourists and that most cities and

towns were geared up for tourism. Others talked of how *helpful the tourist information centres have been – they are brilliant – they bend over backwards to help you*. Many visitors commented on the friendliness of New Zealanders – their relaxed, warm, and helpful nature and their genuine interest in you as individual. One couple mentioned that this formed part of their reason for deciding to come to New Zealand.

The majority of those interviewed, however, were aware that as tourists they could not hope to engage with New Zealand and the local population in any meaningful way. This is partly because they were not here for long enough and were too busy fitting in as much as possible on what was, for some, *a trip of a lifetime*. Often their only interaction with New Zealanders was with tourism activity hosts/guides. The amount of interaction tourists had with locals sometimes varied dependent on the accommodation they were staying in. Those travelling in campervans, in particular, had little contact with locals and were spending a significant proportion of their time in the company of other tourists. Many visitors commented that they enjoyed being treated as an individual and often preferred smaller places and experiences where there was a personal element: *The host was very friendly, willing to chat, his genuine interest in talking to me personally, also his knowledge and manner, made a big impression on me*. One backpacker compared a large hostel he had stayed in with smaller ones, *It was a lot less personal than the hostels I've stayed in previously – it was more of a business*. Another couple spoke of preferring smaller B&B accommodation over hotels: *we'd rather stay in a B&B – I think you get to know the local people and they tell you what is going on in the area which is what we like*.

Travelling away from the main tourist routes also offered more opportunities to interact with the local population. Visitors to the East Cape and Te Urewera spoke about their experiences there being different to those in other parts of New Zealand. They felt East Cape was an area where you could experience the *real* New Zealand and where towns didn't revolve around tourism. *It's the first time in New Zealand where I haven't felt that the towns were centred around tourism*. Although a high percentage of the East Cape and Te Urewera populations are Māori it did not come across in interviews that tourists necessarily recognised this. What the tourists liked was the experience of visiting remote, underpopulated, less touristy areas of New Zealand, not necessarily involving engagement with Māori culture.

Māori cultural tourism

Tourist experiences of Māori culture

When asked specifically about their experiences of cultural tourism in New Zealand visitors often only thought of traditional performances, marae, and hangī as being Māori experiences: *Dancing, singing, hangī, traditional rituals, marae are Māori – traditional things are Māori*. Although of the nine tourism products visited by the tourists and used by the research only two, Te Puia in Rotorua and Ko Tane in Christchurch, fit this description, many of the tourists interviewed after other experiences had either been to, or planned to visit, a traditional performance while in New Zealand. On the whole those that had been to a performance talked about it being *enjoyable, something to do* and that it offered a good opportunity to learn something about Māori culture. Some commented that they didn't like the idea of Māori packaging and selling their culture to tourists: *I really don't like the idea of Māori going out and selling themselves as a spectacle*. Overall there were mixed feelings as to whether or not cultural shows were authentic; one couple said, *we chose not to see the cultural show – felt it was a bit put on for the tourists*, whilst another interviewee thought the show they had seen was *... probably one of the best things I've seen in New Zealand in terms of cultural – I really enjoyed the authenticity of it*. As McIntosh (2004) reported, traditional representations of culture are more easily recognised by tourists, and therefore appear to be judged accordingly as being 'authentic'.

There was a distinct difference between how visitors to Te Urewera and East Cape judged the ‘authenticity’ of Māori cultural shows, compared with tourists interviewed in Rotorua. Visitors interviewed in Rotorua (none of whom had been to East Cape or Te Urewera) generally viewed the shows as being authentic Māori cultural experiences: *The authenticity of it... we were really involved as if we were a tribe and we’d been invited into their house.* In contrast, visitors to Te Urewera and East Cape tended to view Māori cultural shows as being *put on* for the tourists rather than reflecting the way Māori live today: *It was very commercialised – it was a show or In the big cities what you experience is put on for you. When you come and see it for yourself it’s a bit more authentic.* Having had more personal, local interaction with Māori appeared to influence how such shows were judged by the tourists. In part, authenticity also appears to be judged based on whether the tourist’s interaction is with traditional or contemporary culture.

There were also some differences in experiences of the shows as experienced in Christchurch. The Ko Tane experience was often not what people expected – it was more intimate and more interactive. As one tourist said, *I thought we would just go into a room – sit down and be entertained and then walk out – but it was a lot more involved.* The tourists were surprised to be *taught* as much as they were about Māori culture. They enjoyed learning about Māori culture, however, and felt that the performers made it (the culture) *real*. Comments were made about performers appearing *happy to be there* and at Ko Tane one tourist said that *I didn’t feel like they were thinking ‘oh god, here we go again – another load of tourists – lets do the native thing’.* Another tourist said, *you could see that they were really Māori people and while it is a put-on show it is not a staged show – it is authentic.* The difference between these shows and the larger Rotorua ones, however, might merely be a result of the size of the audiences and the practicalities of engaging intimately with large numbers of tourists.

As already discussed, all the experiences used in the research were selected because they contained at least some cultural component, yet often the tourists interviewed did not appear to consider them to be cultural tourism experiences. In many instances, even when the marketing material included information about cultural component, visitors were not aware of the Māori part of the experiences before they started: *I didn’t even realise it was a Māori experience... the key thing was the horse trek in the National Park, We weren’t aware of the Māori thing before we arrived. The advertising is about rafting not about Māori.* One of the rafting tourists talked about enjoying the cultural aspects of the trip, but still did not consider it cultural, *No – it’s not a cultural experience. It was cool that he said a Māori prayer, you could feel the spirituality, and it was important to him, but the rafting wasn’t very cultural.*

For many visitors the focus of the whole experience needed to be Māori for it to be considered a Māori experience. Meeting Māori people, having Māori bus drivers telling Māori stories, experiencing a mihi (greeting), a karakia (prayer), were not considered Māori cultural experiences per se. This was particularly the case with those who had been on Whale Watch, which was rarely suggested by tourists as a Māori cultural-tourism experience. Until asked by the researcher they had often not registered the fact that they had been on a boat that had a Māori name, was decorated with Māori designs, and usually with a Māori crew and guide. Most did not know that Whale Watch was a Māori company. While this is not surprising, given that Whale Watch is primarily an eco-tourism experience, it does question other research, such as McIntosh et al. (2000), that used this experience as a basis to determine types of cultural experiences.

The most frequently mentioned experiences of Māori culture, apart from traditional performances, were visits to museums with historical displays of cultural items. While a substantial number of those interviewed had been to Te Papa many did not immediately associate this with consumption of a Māori tourism product. Again, when asked, however, they recalled the Māori exhibits, and seemed to have spent a considerable amount of time looking at these. One tourist spoke of being very moved by

the Māori greeting at Te Papa – *it was like a blessing*. Some commented that it is better to *experience* culture than just learn about it: *It is all very well if you go to museums or read about it – but it never really clicks*. Some form of personal interaction seems necessary to make any cultural experiences meaningful. In this respect guides are important.

Mediating the tourist experience

Guides perform multiple roles in tourists' cultural tourism experiences in New Zealand. They impart information, explain protocols, mediate between tourists and hosts, and help make cultural experiences more 'real'. One of the Kiwi Experience tourists talked about the drivers she had on her trip and the guides at other attractions: *You get all the stories about Māori culture and traditions and it is nice to see how it all fits – like at Sky Tower we were told the same story about the canoe and New Zealand being formed – the same as what the drivers had told us – so it seemed like it was more genuine I guess*. While sometimes guides were not Māori, generally it was thought that having a Māori guide or host was important if the information being given was about Māori culture: *It should always be Māori delivering it; The fact that it was a Māori guide made it more credible and authentic*. Others talked about the warmth and friendliness of guides and that it was not just their knowledge but also their personal involvement that was important – the best guides were those perceived to be *passionate about their culture*, or *really relaxed with telling us about their culture*. One tourist commented on a Māori kayaking guide he had: *It was just the way he represented the area, and how he described it to us was obviously influenced by his background – it made it special*.

When the tourist experience involved participation in traditional ceremonies or formal activities guides also played an important role explaining protocols, telling tourists how to behave appropriately and describing in advance what would happen: *They told us what would happen so we knew what to do*. Most tourists were aware that they might not know how to behave and appreciated instructions like these; they also felt more relaxed if they knew what would happen in advance. This attention to detail was appreciated, as one tourist said, *They [the guides] were very good at telling us how to behave – I think as tourists we leave our brains behind*. Another spoke about the instructions they were given by a guide, *He was quite firm in the way we needed to act to be respectful – taking off shoes, not turning our backs, keeping eye contact*.

Even with active mediation from guides some tourists were not always comfortable with cultural experiences, particularly those that involved personal interaction. Observations of tourists at the two East Cape accommodations suggested that younger people were not as comfortable with personal interactions – they did not appear as relaxed, did not ask as many questions, and were less likely to interact with the hosts. Although some commented on liking *homey*, *small* or *family* places to stay, in reality the tourists tended to stay together in a group, separate from the hosts, with the driver/guides acting as go-betweens. One commented that she liked the fact that the *driver was obviously really relaxed and at home here*. While it is difficult to know whether this directly related to cultural uncertainty, it seems likely that at least some of it has a cultural basis. Often tourists wanted to know more about Māori culture but were unsure 'how' to ask questions or 'who' to address them to: as one tourist said, *I wanted to ask some questions but I didn't think it was right to ask*. This did not, however, just apply to younger people; several older tourists also talked about either not feeling comfortable with asking, or not finding themselves in a position to ask what they wanted to know: *I wanted to know why they stick their tongues out but there was no opportunity to ask; I was going to ask about why there was so much fighting over the land but it did not seem right*.

In general, guides (e.g. bus drivers, tour guides, hosts of experiences) played a crucial role in the overall visitor experience. Guides need to be outgoing, relaxed, and happy to share information when asked. People commented on guides making or breaking a holiday – they took a lead role in the dynamics of a group. If the guide was quiet the group tended to be quiet. The guide also needed to be

able to read a group and share just the right amount of information in the right ways – too much and people switch off. Honesty of guides was also important. One tourist had been to a cultural performance at Auckland Museum and commented: *It was just a performance and you can't touch or feel the culture. I asked one of the girls there [at the museum] what was real and alive and she was very honest – she said doing the performances was a job.*

Experiencing contemporary Māori culture

Often, because guides were the only 'locals' tourists came into personal contact with, they also played an important role as mediators connecting traditional aspects of Māori culture with contemporary ones; something many tourists said they found difficult to understand. One tourist said, *The guide spoke in the present-day context – about the way Māori live here and now as well as providing historical information.* Others talked about finding it *difficult to understand how Māori could have their traditions and still live in the modern world.* Most knew very little about Māori culture before coming to New Zealand. One English tourist, for example, said that while he knew there were Māori in New Zealand he *did not know to what extent they were all over the country – or anything about them really,* another knew about *Captain Cook and sheep.* If tourists had any prior knowledge of Māori culture it was normally based on the traditional aspects as shown in tourist promotional material – images of haka and performers in traditional clothing. One couple, for example, knew that they [Māori] *do the haka,* another that they [Māori] *wear grass skirts and stick their tongues out.*

Often they did not connect Māori culture with Māori tourism: *We knew that there were more Māori things to see in the North Island – more attractions for tourists but not that there were more Māori people there and We would like to find out more about Māori culture – everything is geared up for tourism – we would like to mix on a one-to-one basis.* There were some differences in case study areas and visitors to Te Urewera and East Cape in particular talked about enjoying seeing how New Zealanders and Māori really live today. One said, *The best way to learn about culture is just to live among the culture – intersect it in your travels.* Again, for some, awareness they were tourists in the country predetermined how much cultural interaction they expected to have. On the Māori Tour in Kaikoura tourists are taken to the guide's home for afternoon tea, something the tourists did not expect, *we were surprised when he said we were going to have afternoon tea, I thought he would drop us off at a café somewhere – but we actually stopped at his house.* Her husband commented, *it is nice to see people's houses and how they live – to meet the family and see how they live now.* Two younger tourists interviewed after the same experience however, were less comfortable with the 'home' visit: one said, *It is not what you expect to do as a tourist – go to someone's house.*

Contemporary Māori culture was seen as being more authentic by some; seeing the culture in action, the living culture, contributed to the feeling of authenticity. As some tourists said, *we had a modern version of a hāngī – instead of being cooked in the ground it was cooked in a beer keg. I think it's better – it's more realistic.* Others talked of watching carvers at work, enjoying *the fact that in the carving school you were able to see students actually carving, and learning the craft today.* One of the Ko Tane tourists commented on the performers they saw, *watching them I was thinking these people are not just any old Māori dragged into doing this – these are people who have an interest in theatre – this is how they choose to make their living.*

While a lot of interest was expressed in learning more about contemporary Māori culture most were unsure how to go about this. Some commented that they had read newspapers and listened to the radio while travelling around so had got an idea of contemporary culture from that. Many were just as interested in 'all' New Zealand culture and when asked about their cultural experiences talked about meeting 'locals', not specifically Māori. One couple described a memorable night of their holiday, *We stayed a night in Bulls – it was like being in the Wild West,* another tourist *lucked upon a local pub*

quiz when I was in Kaikoura – joined a team with some locals. Tourists see New Zealand as a mix of both Māori and European culture and it was often compared to other countries they have visited where there are less ‘integrated’ native populations like Australia and North America. This integrated culture is remembered – as one Ko Tane tourist said of the performers there, *I didn’t get a sense of ‘we’re Māori – you’re Pākehā’ – I just got a sense that ‘we’re Kiwi’ – they were English speaking people from New Zealand who have the two cultures in their lives and that they were quite happy with that – there was not a sense of ‘this is what we used to be like’.*

Some tourists did not think that their overall travel in New Zealand had brought them into much contact with contemporary Māori culture, as one man said, *Māori culture did not jump out at me.* It is difficult to know whether this is true or not for some, however; one woman interviewed at Whale Watch, when asked about her awareness of, and contact with, Māori culture said, *I didn’t know any Māori stuff – and in fact I think have only seen one [Māori] person.* When it was pointed out to her that she had just been served by a Māori she said, *They are not really different enough to notice.* One tourist, however, had seen a woman with a facial tattoo – *it shocked me quite a bit – I didn’t think they would be like that now.* Often, however, the tourists interviewed had engaged with Māori culture in ways they did not realise. Many talked, for example, about trying to learn to pronounce Māori words and had purchased paua, greenstone or bone carvings as souvenirs.

Overall the tourists wished to consume Māori culture in ways that were clearly recognisable, which in many cases meant engagement with the traditional ‘marketed’ aspects of culture rather than with contemporary culture. For tourists, wishing to consume unique experiences, or gazing at the ‘other’, such distinctions are important. Observations of tourists at each of the three South Island experiences, for example, showed that ‘whales’ make good photos, as do ‘traditionally dressed performers’; the tourists observed on the most cultural of the South Island experiences, the contemporary cultural tour, did not take any photographs. Similarly the East Cape area, which offered a high level of interaction with local people and culture, did not offer many photo opportunities apart from the scenery. One tourist interviewed at Te Kaha, when asked about including people in her photos, said that occasionally she put other ‘tourists’ in them, not locals.

Most had enjoyed learning about Māori culture and were happy with the amount they had learnt about it while travelling in New Zealand. One tourist commented, *In reality there is so much to take in – if I was on a trip where they constantly bombarded me with it I’d switch off.* Many appeared to have gained some understanding of underlying Māori beliefs: *Māori people are natural people, people who are in touch with nature and living off the land and I like the concept where they (Māori) think about everything as being alive.* For some learning about Māori culture in a way that they could relate to themselves made it more special: one young Māori Tour tourist spoke about her tour: *I learned such a lot from it and learned it in such a way that I can utilise it myself. It made me think about where my family came from – and who I was.*

Value added to eco-cultural products

Tourists often had not realised that they had participated in a Māori tourism experience and in most cases (other than those interviewed at Te Puia, Māori Tours and Ko Tane) had decided to do the experience for other reasons (e.g. for the scenery, the adrenalin rush, the actual activity, or wildlife or nature experience). This made it difficult to get tourists to reflect on their experiences of cultural tourism. Even when asked specifically about what value was added to experiences by Māori components, responses need to be treated with caution as cultural tourism components offered little more than opportunities for simple entertainment and superficial learning experiences. This is similar to findings in other research (McKercher & du Cros 2002; McIntosh 2004).

There does, however, appear to be some value-added to general tourism experiences by Māori cultural components. This research suggests that this comes primarily from engagement on a personal level with contemporary culture. This can be experienced in a variety of ways: through meeting Māori people (e.g. meeting locals and having Māori guides, drivers and hosts); hearing Māori stories (guides and hosts sharing legends, histories, and personal stories); seeing the culture in action (guides and hosts doing mihi, karakia, weaving demonstrations, and explaining cultural protocols, e.g. not sitting on tables); and experiencing hands-on activities (visitors singing waiata (a song or chant which follows a speech), doing bone carving, learning to weave, doing poi or kapa haka (traditional Māori performing arts), etc.). Most visitors would not, however, be prepared to pay more for experiences that included this type of engagement, although some visitors said that, if they had known about it (Māori components/guides etc.) beforehand, with all else being equal, it may have influenced their decision to participate: as one tourist said, *No I wouldn't have paid a substantial amount more. But it would have swayed my decision.* In part this may be a result of price sensitivity; younger visitors in particular were on tight budgets and price sensitive with respect to food, accommodation, and many general tourism experiences. Only when activities offered were 'special' (such as the once-only tick-off experiences like sky diving) or were ones they were passionate about would they be prepared to pay more for the experiences. Others appeared to have come to expect Māori cultural components as a normal part of their New Zealand tourism experiences: *No – I wouldn't pay more. Māori is part of almost everything you do – the bus driver, the guides – they will tell you about the Māori stuff.*

Many did not associate 'added-value' with specific aspects of their experiences; rather added-value resulted from the ways in which cultural interactions *added a richer dimension to the experience.* One tourist, when asked about whether Māori/cultural components added 'value' replied, *Very much so – it makes me appreciate that there is more to this land – there is history so it makes a whole picture rather than just a pretty picture.* When asked if it was still a pretty picture responded, *Oh yes – but the colours are more vibrant I suppose.* Others talked of experiences with Māori components increasing levels of satisfaction and making experiences richer, *when we were reading the material... it's a Māori area and it's Māori – that adds another level to it.*

Discussion

Interviewing tourists immediately after they had experience of a Māori tourism product ensured they had at least some familiarity with Māori cultural tourism products and experiences in New Zealand. The wide range of experiences used (with varying degrees of cultural content) generated some interesting responses on what tourists perceive cultural tourism to be. Many of the tourists, for example, did not think that they had engaged in a cultural experience at all. They did, however, express interest in Māori culture as part of their New Zealand visitor experience. As one tourist said, *Should promote Māori in other countries more. Many people don't know about Māori culture.*

Māori tourism operators need to find a balance between what they want to provide to visitors by way of a Māori experience, with greater understanding of why visitors choose their experiences and which components of those experiences they enjoy the most. In order to influence how and what visitors perceive to be Māori culture, tourism authorities and individual operators need to consider ways to increase the profile of the many cultural elements that visitors can experience. They need to develop their experiences and market them accordingly, highlighting aspects of Māori culture that are not immediately obvious to visitors, rather than focusing on the traditional images of Māori culture. This research indicates that tourists are interested in contemporary Māori culture in New Zealand and enjoy tourism experiences that involve learning about Māori culture. While it seems that tourists are not prepared to pay more for these aspects of an experience, they do however add considerable value to experiences in terms of both enjoyment and satisfaction.

It appeared that most tourists visiting New Zealand are not primarily cultural tourists, despite most fitting into the numerous categories of cultural tourists described in other research (Moscardo & Pearce 1999; McIntosh et al. 2000; McKercher & du Cros 2002; Colmar Brunton 2004). Cultural attractions are, however, on the 'lists' of things to do of most mainstream tourists. Many niche products with cultural components are also available. These niche products, however, are small-scale and often located in remote areas, such as East Cape and Te Urewera. This research found that visiting such areas enabled tourists to engage with locals (both Māori and non-Māori) through genuine, non-commercial, real-life interaction. Again, this was often not strictly cultural and a substantial part of the attraction for tourists appeared to be the opportunity to visit remote and relatively tourist-free areas. In this respect, given that the attraction is focused on having few other tourists around, the sustainability of tourism businesses in these areas must be questioned.

For many tourists the most common form of engagement with the local population was through mediated tourism experiences. This included interactions that were not always strictly 'touristic'. What appears to be most important is putting tourists at ease. Many of the tourists interviewed for this part of the research had previously visited other countries with indigenous populations. Often comparisons were made between the Māori cultural tourism experiences found in New Zealand and indigenous cultural tourism experienced elsewhere, which suggests at least some habitual interest in the cultural components offered by international travel experiences. Of key importance to the tourists is how culture is presented, and how 'easy' the experience is for them. Cultural engagements need to appear genuine and sincere (Taylor 2001), and must be mediated to the extent that tourists are put at ease and do not feel in any way threatened, as McKercher and du Cros (2002) suggested. The 'authenticity' of the experiences presented appears to be less important, as most of the tourists interviewed had very little knowledge of Māori culture before coming to New Zealand, and therefore had nothing to judge authenticity by, although many tourists did make attempts to judge the authenticity of their experiences..

This also suggests that there is scope to develop Māori cultural tourism products in association with other types of tourist attractions. In particular, given the interest in nature and eco-tourism experiences in New Zealand and the expressed interest by many in learning more about Māori cultural beliefs, there appears to be scope for tourism products that combine eco- and cultural elements. Ryan and Huyton (2002), in Australian research, found that those with an interest in the natural environment were also interested in tourism products associated with the indigenous population. Cultural tourism products may also be attractive to specialist market segments who are not necessarily deliberate cultural tourists. Māori Tours in Kaikoura, for example, one of the 'more' cultural of the tourism products used in this research (but a niche product because of its small scale and because cultural tourism is not a high priority for visitors to New Zealand) attracts a substantial number of visitors on educational trips. There may be other specialist market segments for whom cultural tourism products are an attraction.

Overall it seems that Māori cultural tourism needs to be understood in the context of general tourist experiences, as suggested by McKercher and du Cros (2002) and as supported by the findings of this research. As they pointed out, not all cultural tourists are alike. Personal interests and circumstances will dictate how tourists choose to consume culture in the countries they visit. This varies dependent on many factors – from tourists' previous experiences, their specialist interests, their age, the length of their visit and the time available to them, their mode of travel, budget, and prior knowledge etc. Even if 'cultural' tourists are not readily identifiable most tourists still have some interest in cultural experiences, and how culture is presented also makes a difference. While New Zealand does not attract cultural tourists per se, Māori cultural components have the potential to add considerable value to the tourism experience. However, tourists are reluctant to pay a premium for these cultural components.

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7. Appendices

Appendix 1 Questionnaire

TOURIST SURVEY

Location _____ Date _____

SECTION ONE

a) What is your country of residence? (if from New Zealand, city or town)

b) Have you ever visited New Zealand before? (**For internat. tourists only**)

Yes	1
No	2

c) Do you know what this region is called? (Show Map)

d) Are you intending on visiting, or have you already visited the Peninsula region?

 YES

 NO

If not, Why not

? _____

OR

If yes, what are the three most interesting aspects of the Banks Peninsula region that made you include it in your travel plans?

1. _____

2. _____

3. _____

d) How many nights will you (or did you) spend on Banks Peninsula?

_____ nights **OR** Day trip only _____ **OR** Undecided _____

e) When did you make your decision to visit the Banks Peninsula?

At home	1
Prior to arriving in NZ, i.e. in another country	2
During my travel in NZ	3

f) What sources of information did/do you use to plan your entire trip?
Circle all that apply.

Guide book	1	Brochure	2
Information centre	3	Website	4
Friends/family	5	Other travellers	6
Advertising	7	Travel articles	8
Travel agent	9	Other	10

g) I am particularly interested in things you might find interesting to do while travelling in New Zealand. How would you rate the attractiveness of the following activities on a scale of 1 to 7 where 1 is Not very attractive and 7 is very attractive.

	Not very attractive		Moderately attractive			Very attractive		N/A
	1	2	3	4	5	6	7	
1. To enjoy natural landscapes	1	2	3	4	5	6	7	0
2. To experience Māori culture	1	2	3	4	5	6	7	0
3. To visit museums	1	2	3	4	5	6	7	0
4. To view dolphins or whales	1	2	3	4	5	6	7	0
5. To buy authentic New Zealand souvenirs	1	2	3	4	5	6	7	0
6. To try a traditional Māori feast (hangi)	1	2	3	4	5	6	7	0
7. To go horse trekking	1	2	3	4	5	6	7	0
8. To go white water rafting	1	2	3	4	5	6	7	0
9. To visit a Māori meeting house (Marae)	1	2	3	4	5	6	7	0
10. To go mountain biking	1	2	3	4	5	6	7	0
11. To go on a scenic boat cruise	1	2	3	4	5	6	7	0
12. To find out about native plants and animals	1	2	3	4	5	6	7	0
13. To go hiking	1	2	3	4	5	6	7	0

SECTION TWO

I am going to read you three possible tourist attractions that may be of interest to you **in this area**. After each, I want to ask you a few questions about them.

a) Heritage trails by water

- A one-day Māori guided boat trip
- Travelling from Lyttleton port through the headland to a peninsula Marae.
- Māori guide will explain Māori and European history pointing out significant landmarks.
- Wildlife and traditional seafood and gathering practices
- Local stories and folklore.

Also included is:

- Traditional lunch, provided by the local Marae in the Port area.
- Return transport to and from the harbour
- Tour size, maximum of 20 people. Cost \$150 p.p

Thinking about this trip how suitable **for you personally** is:

The length:	Not enough	About right	Too much
The Māori content:	Not enough	About right	Too much
The nature content:	Not enough	About right	Too much
The activity content:	Not enough	About right	Too much
The cost:	Not enough	About right	Too much

How would you rate this activity overall, where 1 = *not attractive* and 7= *very attractive*:

Not attractive 1 2 3 4 5 6 7 *Very attractive*

This product is of no interest to me at all

Any comments?

b) Guided tours of the Banks Peninsula Food Trails

- A choice of half-day trips (four in total)
- Explore the historical Māori food trading routes and trails of the peninsula.
- A local Māori guide will offer interpretation on the numerous historical and cultural Māori places of interest, such as fortified villages, totem poles, and traditional use of plants seen along the way.
- Each leg of the journey can be completed in around 4 hours.
- Transport is provided to and from both ends of the trails.
- You will need to provide your own food, water, and hiking gear.
- Minimum of four, maximum of 8 people \$99.00 p.p.

Thinking about this trip how suitable **for you personally** is :

The length:	Not enough	About right	Too much
The Māori content:	Not enough	About right	Too much
The nature content:	Not enough	About right	Too much
The activity content:	Not enough	About right	Too much
The cost:	Not enough	About right	Too much

How would you rate this activity overall, where 1 = *not attractive* and 7= *very attractive*:

Not attractive 1 2 3 4 5 6 7 *Very attractive*

This product is of no interest to me at all

Any comments?

- c) Traditional Māori Performance and dinner held at a Marae (*meeting house*)
- a traditional indigenous welcoming ceremony performed by local Māori.
 - a Māori feast (*hangi*) cooked in an underground pit.
 - a lively show of traditional songs and dance performed by the local Marae's culture group.
-
- Transport will be provided to and from your accommodation to the Marae.
 - Along the way you will be given information regarding protocol for the evening's events.
-
- Starts at 7.30 pm and finished at around 10.30
 - \$65 Adults, \$39 children.

Thinking about this trip how suitable **for you personally** is:

The length:	Not enough	About right	Too much
The Māori content:	Not enough	About right	Too much
The entertainment content:	Not enough	About right	Too much
The cost:	Not enough	About right	Too much

How would you rate this activity overall, where 1 = *not attractive* and 7= *very attractive*:

Not attractive 1 2 3 4 5 6 7 *Very attractive*

This product is of no interest to me at all

Any comments?

SECTION THREE

- a) What is your main purpose for travelling in **New Zealand** at present?

On Holiday	1
Visiting friends and relatives	2
Business/conference/meetings	3
Other	4

- b) Are you travelling as a member of an **organized** tour group?

Yes	1
No	2

- c) What is the total number of nights you will spend on **this** trip
(*For international guests this will be for the entire NZ trip*)

_____ nights

- d) Who are you travelling with?

Travelling alone	1
Travelling with partner/spouse	2
Travelling with friends	3
Travelling with family	4
Travelling with family and friends	5
Travelling with business associates	6
Travelling as part of a special interest group	7
Other	8

- h) Which age group do you belong to?

Under 19	1
20-29	2
30-39	3
40-49	4
50-59	5
60-69	6
Over 70	7

i) Are you..

Male	1
Female	2

j) What is your daily budget **per person** for this trip. Please exclude international airfares, but include accommodation, transport, domestic airfares, food, admissions and souvenirs?

Less than \$50 per day (NZD)	1
\$50 -\$100 per day	2
\$100 - \$200 per day	3
More than \$200 per day	4

l) What is your **main** mode of transport for this holiday?

Private Car	1	Campervan	2
Rental Car	3	Domestic Air	4
Coach Tour	5	Public Bus	6
Bicycle	7	Backpacker bus	8
Other	9		

m) What is your **main** type of accommodation for this holiday?

Hotel	1	Bed & breakfast / Farmstay	2
Motel	3	Motor camp/ Camp ground	4
Hostel/ backpackers	5	Private home/ holiday house/ staying with friends/family	6
Other	7		

NOTE: a second questionnaire with the same questions but adapted for the Northern region and containing the Northern scenarios does not appear here. The Northern Scenarios are given in Appendix 2.

Appendix 2 Scenarios

Northern Study Scenarios

(1) One-day sea fishing

Starting from Te Kaha, join our experienced, local Māori fishing guide on his well-equipped, modern 12-metre launch.

Learn from your guide about traditional Māori fishing techniques, kai moana (sea food), local histories, and see the active volcano, White Island.

Your host will cook up your catch for dinner and you can sample other traditional Māori delicacies from the sea – koura (crayfish), kina (sea eggs), and kukū kukū (green-lipped mussels).

Includes lunch, dinner, and all fishing equipment

Maximum number of people: 12 (minimum 4)

Cost per person: \$195

(2) Two-day guided bush walk

Begin with a leisurely boat ride to the start of the walk and then enjoy two days of relaxed walks through some of New Zealand's most magnificent indigenous beech forest, with stunning lake-views along the way.

A local Māori guide will share personal stories about the region's history and heritage, and you'll learn about and see some of the unique birds and plants in the region.

Bring your togs to enjoy secluded swimming holes.

Overnight at a well-equipped hut with hot showers.

Includes boat trip, all food, overnight hut-stay with bedding, transport of your gear so you don't have to carry it, and travel to and from the starting point.

Maximum number of people: 10

Cost per person: \$345

(3) Four-day horse trek

Local Māori will guide you through the heart of Te Urewera forest, over iwi (tribal) land to remote places only accessible to local Māori and rarely seen by others.

See expansive indigenous podocarp forest, ford streams, and enjoy hilltop views.

Learn about local Māori stories, histories, bush medicine, and general Māori way of life.

Do some fishing and short walks along the way.

Includes two nights' camping and the last night on a marae with hāngī dinner, transport from Rotorua or Whakatane to the start of the trek and back again, horses, fishing rods, and all meals and equipment (tent, sleeping bags, etc.)

Suitable for both beginner and experienced riders

Maximum number of people: 8

Cost per person: \$795

Southern Case Scenarios

(1) Heritage trails by water

A one-day Māori-guided boat trip

Travelling from Lyttelton port through the headland to a peninsula marae.

Māori guide will explain Māori and European history pointing out significant landmarks, wildlife and traditional seafood and gathering practices, local stories and folklore.

Also included is:

Traditional lunch, provided by the local marae in the port area.

Return transport to and from the harbour.

Maximum number of people: 20

Cost per person: \$150

(2) Guided tours of the Banks Peninsula food trails

A choice of half-day trips (four in total)

Explore the historical Māori food trading routes and trails of the peninsula.

A local Māori guide will offer interpretation on the numerous historical and cultural Māori places of interest, such as fortified villages, totem poles, and traditional use of plants seen along the way.

Each leg of the journey can be completed in around 4 hours.

Transport is provided to and from both ends of the trails.

You will need to provide your own food, water, and hiking gear.

Maximum number of people: 8 (minimum 4)

Cost per person: \$99

(3) Traditional Māori performance & dinner held at a marae (*meeting house*)

A traditional indigenous welcoming ceremony performed by local Māori.

A Māori feast (*hangi*) cooked in an underground pit.

A lively show of traditional songs and dance performed by the local marae's culture group.

Transport will be provided to and from your accommodation to the marae.

En route you will be given information regarding the protocol for the evening's events.

Starts at 7.30 pm and finishes around 10.30 pm

Cost per person: \$65 adults, \$39 children

Appendix 3 Contingency tables for exploring significant relationships between attraction items and scenarios

Southern Case Study Scenario 1: One day guided boat cruise

Table A1 One-day guided boat cruise with three Māori-related attraction items (%)

Attractiveness of 'to experience Māori culture'	Attractiveness of one-day guided boat trip					
	International visitors			Domestic visitors		
	Low	Mod.	High	Low	Mod.	High
Low	27	7	5	64	17	5
Moderate	46	69	48	36	83	79
High	27	24	48	0	0	16
Total in group (n)	26	71	44	28	12	19
Attractiveness of 'to try a hangi'						
Low	65	31	32	68	58	16
Moderate	23	51	36	25	33	47
High	12	18	32	7	8	37
Total in group (n)						
Attractiveness of 'to visit a marae'						
Low	52	25	25	89	67	26
Moderate	28	59	34	11	33	37
High	20	15	41	0	0	37
Total in group (n)	25	71	44	28	12	19

Southern Case Scenario 2: Half-day guided walk of historic peninsula food trails

Table A2 Cross tabulation of half-day guided walk of historic peninsula food trails with four attraction item ratings for domestic visitors

Attractiveness of 'to experience Māori culture'	Attractiveness of half-day guided food trails walk to domestic visitors						
	Low (%)	Mod. (%)	High (%)	Attractiveness of 'to visit museums'	Low (%)	Mod. (%)	High (%)
Low	61	0	11	Low	30	12	22
Moderate	39	94	67	Moderate	67	76	33
High	0	6	22	High	3	12	44
Total in group (n)	33	17	9	Total in group (n)	33	17	9
Attractiveness of 'to try a hangi'							
Attractiveness of 'to try a hangi'	Low (%)	Mod. (%)	High (%)	Attractiveness of 'to visit a marae'	Low (%)	Mod. (%)	High (%)
Low	70	24	22	Low	88	47	11
Moderate	21	53	44	Moderate	12	47	22
High	9	24	33	High	0	6	67
Total in group (n)	33	17	9	Total in group (n)	33	17	9

Table A3 Cross tabulation of half-day guided walk of historic peninsula food trails with two attraction item ratings for international visitors

Attractiveness of 'to go hiking'	Attractiveness of half-day guided food trails walk to international visitors						
	Low (%)	Mod. (%)	High (%)	Attractiveness of 'to learn about native plants & animals'	Low (%)	Mod. (%)	High (%)
Low	37	13	3	Low	17	4	20
Moderate	26	37	14	Moderate	50	38	34
High	37	50	83	High	33	58	46
Total in group (n)	54	52	35	Total in group (n)	54	52	35

Table A4 Cross tabulation of half-day guided walk of historic peninsula food trails with attractiveness of 'to go white water rafting' for international visitors

Attractiveness of 'to go white water rafting'	Attractiveness of half-day guided food trails walk to international visitors		
	Low (%)	Mod. (%)	High (%)
Low	69	48	37
Medium	20	33	34
High	11	19	29
Total in group (n)	54	52	35

Southern Case Scenario 3: Traditional performance and hangi

Table A5 Cross tabulation of interest in traditional performance and hangi with attractiveness of three Māori-related attraction items

	Attractiveness of 'traditional performance & hangi'					
	International visitors			Domestic visitors		
Attractiveness of 'to experience Māori culture'	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	21	6	6	65	7	0
Moderate	64	59	54	35	93	77
High	15	35	40	0	0	23
Total in group (n)	39	34	68	31	15	13
Attractiveness of 'to try a hangi'						
Low	67	38	21	74	40	0
Moderate	25	44	48	23	47	46
High	8	18	31	3	13	54
Total in group (n)	39	34	68	31	15	13
Attractiveness of 'visiting a marae'						
Low	50	26	21	84	60	23
Moderate	39	53	46	13	27	46
High	11	21	34	3	13	31
Total in group (n)	38	34	68	31	15	13

Table A6 Cross tabulation of interest in traditional performance and hangi with 'to visit museums' attraction item for international visitors

Attractiveness of 'to visit museums'	Attractiveness of traditional performance & hangi to international visitors		
	Low (%)	Mod. (%)	High (%)
Low	41	18	16
Medium	44	47	62
High	15	35	22
Total in group (n)	39	34	68

Northern Case

Northern Case Scenario 1: One-day sea fishing trip

Table A7 Cross tabulation of interest in a one-day sea fishing trip with ‘to visit museums’ attraction item for international tourists

Attractiveness of ‘to visit museums’ item	Attractiveness of 1-day sea fishing trip to international visitors		
	Low (%)	Mod. (%)	High (%)
Low	53	38	31
Medium	18	15	15
High	29	15	55
Total in group (n)	107	13	62

Table A8 Cross tabulation of interest in a one-day sea fishing trip with ‘to go on a scenic boat cruise’ item for international tourists

Attractiveness of ‘boat cruise’ item	Attractiveness of 1-day sea fishing trip (N Case) to international visitors		
	Low (%)	Mod. (%)	High (%)
Low	35	8	16
Medium	31	46	19
High	33	46	65
Total in group (n)	105	13	62

Table A9 Cross tabulation of interest in a one-day sea fishing trip with ratings for ‘to find out about native plants and animals’ attraction item

Interest in ‘learning about native plants and animals’	Attractiveness of 1-day sea fishing trip (N Case)					
	International visitors			Domestic visitors		
	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	50	38	19	72	50	48
Medium	30	23	38	21	0	28
High	20	38	37	7	50	25
Total in group (n)	105	13	60	61	2	40

Northern Case Scenario 2: Two-day guided bush walk

Table A10 Cross tabulation of interest in a two-day guided bush walk with ratings for ‘to visit museums’ attraction item

Attractiveness of ‘To visit museums’	Attractiveness of 2-day guided bushwalk					
	International visitors			Domestic visitors		
	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	56	46	36	70	27	53
Moderate	23	0	14	3	36	6
High	21	54	50	27	36	41
Total in group (n)	71	13	98	60	11	32

Table A11 Cross tabulation of interest in a two-day guided bush walk with ratings for ‘to buy authentic NZ souvenirs’ attraction item for international visitors

Attractiveness of buying authentic NZ souvenirs	Attractiveness of 2-day guided bush walk to international visitors		
	Low (%)	Mod. (%)	High (%)
Low	55	38	34
Moderate	32	38	28
High	13	23	39
Total in group (n)	71	13	98

Table A12 Cross tabulation of interest in a two-day guided bush walk with two attraction items for international visitors

Attractiveness of white water rafting	Attractiveness of 2-day guided bush walk to international visitors						
	Low (%)	Mod. (%)	High (%)	Attractiveness of Mountain biking	Low (%)	Mod. (%)	High (%)
Low	48	69	22	Low	49	77	14
Moderate	8	0	12	Moderate	16	8	42
High	44	31	66	High	35	15	43
Total in group (n)	71	13	97	Total in group	71	13	97

Table A13 Cross tabulation of interest in a two-day guided bush walk with ratings for ‘to go hiking’ attraction item

Attractiveness of hiking	Attractiveness of 2-day guided bushwalk					
	International visitors			Domestic visitors		
	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	34	69	4	42	9	19
Moderate	30	15	26	33	27	25
High	37	15	70	25	64	56
Total in group (n)	71	13	96	60	11	32

Table A14 Cross tabulation of interest in a two-day guided bush walk with ratings of ‘to go on a scenic boat cruise’ attraction item

Attractiveness of scenic boat cruise	Attractiveness of 2-day guided bushwalk					
	International visitors			Domestic visitors		
	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	44	31	14	48	18	38
Moderate	25	31	30	15	55	38
High	31	38	56	37	27	25
Total in group (n)	71	13	96	60	11	32

Table A15 Cross tabulation of interest in a two-day guided bush walk with ratings of ‘to learn about native plants and animals’ attraction item for international visitors

Attractiveness of finding out about native plants and animals	Attractiveness of 2-day guided bush walk to international visitors		
	Low (%)	Mod. (%)	High (%)
Low	46	83	35
Moderate	34	8.5	31
High	20	8.5	33
Total in group (n)	71	13	96

Northern Case Scenario 2: Four-day horse trek

Table A16 Cross tabulation of interest in a four-day horse trek with ratings of three attraction items: mountain biking, scenic boat cruise and native wildlife

	Attractiveness of 4-day horse trek					
	International visitors			Domestic visitors		
Attractiveness of mountain biking	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	53	31	12	45	14	33
Moderate	21	39	33	22	29	6
High	26	31	55	33	57	61
Total in group (n)	76	36	68	64	21	18
Attractiveness of scenic boat cruise	Low					
Low	41	14	18	48	14	50
Moderate	25	44	24	19	52	22
High	34	42	59	33	33	28
Total in group (n)	76	36	68	64	21	18
Attractiveness of finding out about native plants and animals	Low					
Low	43	63	32	69	43	61
Moderate	40	20	26	17	48	17
High	17	17	41	14	10	22
Total in group (n)	76	36	68	64	21	18

Table A17 Cross tabulation of interest in a four-day horse trek with ratings of two attraction items: hiking and horse trekking

	Attractiveness of 4-day horse trek					
	International visitors			Domestic visitors		
Attractiveness of hiking	Low (%)	Mod. (%)	High (%)	Low (%)	Mod. (%)	High (%)
Low	35	22	3	41	5	28
Moderate	27	39	19	30	33	28
High	38	39	78	30	62	44
Total in group (n)	76	36	68	64	21	18
Attractiveness of horse trekking	Low					
Low	66	56	48	60	10	33
Moderate	19	28	17	12	57	17
High	15	16	35	19	17	50
Total in group (n)	76	36	68	64	21	18

Table A18 Cross tabulation of domestic tourist interest in a four-day horse trek with two attraction items: experiencing Māori culture and trying a hangi

Attractiveness of experiencing Māori culture	Attractiveness of 4-day horse trek						
	Domestic visitors			Attractiveness of trying a hangi	Domestic visitors		
	Low (%)	Mod. (%)	High (%)		Low (%)	Mod. (%)	High (%)
Low	59	25	50	Low	59	25	61
Moderate	8	45	17	Moderate	6	40	11
High	33	30	33	High	34	35	28
Total in group (n)	64	20	18	Total in group (n)	64	20	18

Table A19 Cross tabulation of interest in a four-day horse trek with two attraction items: viewing dolphins or whales and white water rafting

Attractiveness of viewing dolphins or whales	Attractiveness of 4-day horse trek						
	Domestic visitors			Attractiveness of white water rafting	International visitors		
	Low (%)	Mod. (%)	High (%)		Low (%)	Mod. (%)	High (%)
Low	67	33	50	Low	47	37	22
Moderate	11	48	39	Moderate	8	11	11
High	22	19	11	High	45	52	67
Total in group (n)	64	21	18	Total in group (n)	76	36	68



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