



Departure Card Visitor Surveying Rakiura/Stewart Island

DECEMBER 2020 – MAY 2021

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Highlights

Departure surveys of visitors departing Rakiura, Stewart Island were undertaken at Halfmoon Bay Wharf and Stewart Island Flight Centre between 21 December 2020 and 13 May 2021. Key findings are presented below:

- Total returned survey count was 3,073, representing 10,833 visitors or an estimated 53% of all visitors to the Island over this period¹
- Visitors departing were invited to complete the form as one per group (e.g., family, friends, organised group). On average each completed form represented 3.6 visitors.
- 23% of visitors to the Island comprised 'family groups' (i.e., at least one under 18 in age and at least one parent over 18), 17% of visitor were travelling as a (young) professional couple (18–50, with no dependents), and 46% were an older traveller, couple or group (50+, with no dependents)
- The average length of stay was 3.6 days
- Of those surveyed, only 13% opted for a day trip².
- The over 50-year age group dominated the visitors surveyed, with 58% of visitors surveyed being in this group.
- 69% of visitors to Rakiura had not visited before, and 93% said they will return.
- 97% of visitors were, unsurprisingly, New Zealanders. The largest portion of visitors were from Auckland (26.9%), followed by Canterbury (17.5%) and Otago (11.8%). Visitors from Southland only constituted 4.1% of all visitors over this survey period.
- Of the 26.9% of Aucklanders who visited, 17% came for a day trip only. Of these day trippers, 40% were estimated to be travelling as family groups.
- The top reason for travel to the Island was as a "Bucket List" destination (27% of visitors), followed by seeing a kiwi/wildlife (19% of visitors) and tramping/walking/hunting (15%). Only 10% of visitors listed their motivation as being related to COVID-19 and associated impacts (e.g., the closure of the international borders, lack of international tourists, domestic marketing campaigns).
- Short walks (63%) and Bird Watching (50%) were the main activities undertaken by visitors while on the Island. Of note, 38% of visitors undertook a guided tour.
- *Te Wharawhara* Ulva Island was the most visited place, with 66% reporting they visited the Island pest free sanctuary. The new Rakiura Museum had 41% of visitors and Observation Rock had 35% of visitors.
- There was an even split of visitors opting for commercial accommodation against non-commercial providers, with 51% opting for commercial providers (hotel, motel, lodge, backpackers, campground).
- The weighted average score to the question "Has the Island met your expectations?" is **4.48** out of 5 (*where 5 is exceeded expectation*).
- Visitor comments were heavily weighted towards a positive experience on the Island (70%). These mainly spoke of a friendly, welcoming community. Most negative comments were focused around food experiences on the Island, either lack of availability of restaurants, or visitors expecting to find more local seafood.

¹ Estimated to be 19,359 visitors over this period (from the SDC visitor levy data) adjusted for under 18 not paying levy.

² This may be an under representation of the day tripping market given the larger portion of this sample was derived from those departing on the ferry service, where the flight service may have been more suitable for this market (shorter travel time, more services).

Visitor Origin

Unsurprisingly, 97% of visitors to Stewart Island indicated they lived in New Zealand.

- Most arrivals came from Auckland at 27% or (estimated) 5,207 visitors over the period
- Local visitors from Southland represented only 4.1% of visitors to the Island. It is, however, important to note that those who have a holiday house on the Island would not have been captured in this survey.

The remaining 3% were international visitors, with the largest portion of these from the United Kingdom. Estimated international visitor arrivals to the Island represented 581 visitors over this period. A further break down of all regions is presented in Table 1, Figure 1.



Figure 1: Home region of visitors to Rakiura

Table 1: Home region of visitors to Rakiura

Rank	Region	Percentage of Visitors
1	Auckland	26.9%
2	Canterbury	17.5%
3	Otago	11.8%
4	Wellington	11.1%
5	Waikato	8.2%
6	Bay of Plenty	6.0%
7	Nelson/Tasman	4.3%
8	Southland	4.1%
9	Northland	2.7%
10	Taranaki	2.4%
11	Hawkes Bay	2.2%
12	Manawatū-Whanganui	1.0%
13	Gisborne	0.9%
14	Marlborough	0.8%
15	Wairarapa	0.6%
16	West Coast	0.5%

Motive for Travel

Visitors were asked “*What made you come to the Island?*” Through our processing and review, we have classified the comments provided against seven key categories as shown in Table 2 below. These encapsulated the major themes which emerged from the survey forms. Not every respondent answered this question, with only 60% completing it. For a closer look, we have broken the survey forms down by the home region listed of the respondents (Table 2), by the age of the respondents (Table 3), and by assumed group travelling (visitor segment, Table 4).

Overwhelmingly, the top reason for travelling to Rakiura was it is seen as “bucket list” destination (27% of visitors noted this as their reason for travel), and this was heavily weighted towards the older demographic (50+ years) and those travelling from further afield (Auckland, Wellington). 19% of visitors noted their motive for travel was to see a kiwi or other wildlife (mainly birdlife). This was the dominant reason for the younger age groups (18–30 and 30–50) and for those travelling from Otago and Southland.

15% of visitors noted a motive relating to walking or tramping activities. This again was popular primarily for those from Otago and Southland and the younger age brackets. Somewhat interestingly, only 10% of visitors specifically identified the COVID pandemic

and related effects (closure of international borders, no international tourists, cancelled plans) as why they came to Rakiura.

Table 2: Motive for travel to Rakiura, by home region

Home Region:		Auckland	Wellington	Canterbury	Otago	Southland	All
Number of visitors: ^a		1,219	581	1,035	622	170	6,538
Motive for Travel	Bucket List	31%	28%	25%	19%	17%	27%
	Walking / Tramping	16%	19%	16%	18%	21%	15%
	Nature / Scenery	4%	6%	4%	5%	5%	5%
	Seeing a Kiwi / Wildlife	16%	14%	16%	26%	23%	19%
	Can't travel overseas, COVID19	8%	12%	13%	6%	15%	10%
	Part of a bigger trip	9%	5%	7%	0%	0%	7%
	Recommendation	9%	13%	14%	18%	14%	11%
	Significant Event (Birthday, Honeymoon)	6%	3%	6%	7%	5%	7%

^a Some respondents did not complete the home region question, so they have been excluded from this breakdown. However, their data will be reflected in the 'All' category.

Percentage shown is percentage of visitors from that region who completed both the motive for travel question and home region question. Where a visitor has listed multiple home regions, if any of the regions above has been included, they have been included in this table.

Table 3: Motives for travel to Rakiura, by age group

Age Band:		Over 50	30 - 50	18 - 30	All
Number of visitors: ^a		3,668	1,346	774	6,538
Motive for Travel	Bucket List	35%	17%	15%	27%
	Walking / Tramping	14%	18%	17%	15%
	Nature / Scenery	4%	9%	9%	5%
	Seeing a Kiwi / Wildlife	13%	25%	31%	19%
	Can't travel overseas, COVID19	11%	9%	8%	10%
	Part of a bigger trip	7%	5%	3%	7%
	Recommendation	11%	9%	12%	11%
	Significant Event (Birthday, Honeymoon)	5%	8%	4%	7%

^a Some respondents did not complete the age question, so they have been excluded from this breakdown. However, their data will be reflected in the 'All' category.

Percentage shown is percentage of visitors within the respective age bracket who completed both the motive for travel question and age questions.

To understand travel behaviour of key groups travelling to the Island, Great South has specifically looked at visitor responses which fall within the following four groupings (or visitor segments):

1. Family groups: specifically, responses which had at least one under 18-year-old, and parents (any age) travelling
2. (Young) Professionals travelling anyone in the 18–30 and 30–50 age brackets travelling without dependents (assumed to be under 18)
3. Mature travellers (50+) travelling without any dependents
4. Groups of 10 or more people travelling together

Again, the concept of a 'bucket list' is what drove the mature and group travellers to head to Rakiura. Group travel was also motivated by a significant event, for example a birthday

trip for an extended family group or friends and comments written on the cards often reflected this. Seeing Kiwi and other wildlife was the main motive for travel for families and (young) professional visitor segment travelling to the Island.

Table 4: Motives for travel to Rakiura, by visitor segment

Visitor Segment:		Family	(Young) Professionals	Mature	Group	All
Number of visitors: ^a		1,595	768	3,023	2,736	6,538
Motive for Travel	Bucket List	18%	14%	37%	26%	27%
	Walking / Tramping	14%	19%	14%	19%	15%
	Nature / Scenery	3%	11%	4%	1%	5%
	Seeing a Kiwi / Wildlife	24%	32%	12%	19%	19%
	Can't travel overseas, COVID19	10%	9%	11%	6%	10%
	Part of a bigger trip	6%	4%	8%	5%	7%
	Recommendation	12%	8%	11%	7%	11%
	Significant Event (Birthday, Honeymoon)	12%	2%	3%	17%	7%

^a Some respondents did not complete the age question, so they have been excluded from this breakdown. However, their data will be reflected in the 'All' category.
Percentage shown is percentage of visitors within the respective age bracket who completed both the motive for travel question and age question.

Activities by home region

Great South have also provided a breakdown of visitor's responses based on their home region. We have considered these for the top four regions (Auckland, Wellington, Canterbury and Otago) and Southland (as local context). This is shown in Table 5 below.

We calculated the average length of stay on the Island by all respondents was 3.6 days. However, this length of stay varied somewhat depending on a visitor's home region between average length of stay of 3.1 days (those from Auckland) to 4.5 days (those from Otago). This difference is likely to be attributed to the number of day visitors in Auckland's case representing 17% of all visitors, while for Otago this was only 3% of visitors. On average, day visitors represented 13% of total visitors over this period.

Those from Auckland and Wellington regions tended to opt for commercial accommodation options (Hotel, Motel, Lodge and Backpackers/Campground) while those from Otago and Southland tended to opt for holiday house type accommodation (be it rented through the likes of AirBnB.com or through a private/family/friend's 'crib'). Overall, however, the majority of those surveyed opted for commercial accommodation (57%).

Tramping and short walks dominated the reasons for coming to the Island, accounting for 38% and 63% of all visitors respectively. These numbers sat relatively consistent across all regions other than Southland, which has a slightly lower number (26%) of visitors heading to the Island to tramp, likely as a function of the perceived and actual busyness of the Island. Of further note, 28% of visitors opted to undertake the Rakiura track (or part thereof), meaning 10% of visitors must be undertaking tramping further afield, including the multiday *North West Circuit* and *Southern Circuit* tracks.

Table 5: Travel Insights for visitors to Rakiura, by home region

Home Region		Auckland	Wellington	Canterbury	Otago	Southland	All
Number of visitors: ^a		1,973	893	1,497	1,136	395	10,833
Average length of stay		3.1 days	3.4 days	4.0 days	4.5 days	4.0 days	3.6 days
Number of day visitors		17%	11%	6%	3%	9%	13%
Accommodation Insights	Hotel, Motel, Lodge	40%	37%	35%	16%	16%	34%
	Private House	17%	11%	12%	22%	29%	14%
	Rented House	23%	26%	33%	39%	39%	27%
	DoC (Campsite/Hut)	12%	15%	14%	9%	8%	13%
	Backpackers / Campground (Shared Facility)	21%	27%	17%	23%	12%	23%
Activity Insights	Tramping	35%	37%	35%	39%	26%	38%
	Short Walk	61%	64%	66%	69%	73%	63%
	Bird Watching	49%	49%	54%	57%	43%	50%
	Star Gazing	14%	14%	18%	18%	12%	15%
	Guided Tour	47%	34%	39%	26%	29%	38%
Areas Visited	Ulva Island	71%	63%	66%	60%	55%	66%
	Observation Rock	38%	40%	37%	36%	31%	35%
	Moturau Moana	13%	14%	14%	19%	20%	13%
	Rakiura Museum	45%	42%	47%	39%	53%	41%
	Rakiura Track	23%	29%	26%	27%	15%	28%
Been Before	Yes	21%	18%	34%	59%	69%	31%
	No	79%	82%	66%	41%	31%	69%
Will Return	Yes	91%	93%	94%	98%	93%	93%
	No	9%	7%	6%	2%	7%	7%
Experience rating (out of 5 – exceeded expectation)		4.47	4.56	4.53	4.56	4.41	4.48

^a Some respondents did not complete the home region question, so they have been excluded from this breakdown. However, their data will be reflected in the 'All' category.

Percentage shown is percentage of visitors from that region who completed both the motive for travel question and home region question. Where a visitor has listed multiple home regions, if any of the regions above has been included, they have been included in this table.

38% of all visitors went on some form of a guided tour on the Island. This appeared especially popular with visitors from Auckland, almost 1 in 2 Aucklanders opting for such a tour. Related and somewhat unsurprisingly 66% of all visitors went to *Te Wharawhara*, Ulva Island. This proved popular with those from Auckland (71%) and less so for those visiting from Southland (55%).

For those from Auckland and Wellington, around 20% of visitors have been to the Island before (and are therefore returning), whereas 59% from Otago and 69% from Southland had been before. . In the case of Southland, noting the low numbers (4.1% of total visitors) and 29% staying in private houses, it is likely that Southlanders are generally staying away from the busy period for the Island, and those travelling are only those with a direct connection to the place (e.g., with family or friends on the Island). Continuing this survey through the quieter shoulder season and winter period may provide a better understanding of how and why Southlanders travel to the Island.

Overwhelmingly, there was a strong desire to return to the Island across all regions, averaging 93% of respondents. This couples with a high experience score of 4.48 out of a possible 5 (where 5 is "exceeded expectations"). The only slight fluctuation in this was a

slightly lower score (4.41) from Southlanders, who by majority have been there prior and observed the challenges of the relative busyness of the place.

Activities by age group

Applying the same methodology, we have provided a breakdown of responses by listed age demographic (table 6 below), to look for any preference in activity or travel behaviour across the three age groups listed. We have not provided any insights for the under 18 age group as these are normally travelling with family groups, which is discussed further in table 7 below.

Table 6: Travel insight, by age group

Age Band		Over 50	30 - 50	18 - 30	All
Number of visitors ^a		6,054	2,088	1,287	10,833
Average Length of Stay		3.3 days	3.9 days	4.1 days	3.6 days
Number of day visitors		14%	10%	9%	13%
Accommodation Insights	Hotel, Motel, Lodge	43%	26%	18%	34%
	Private House	15%	14%	11%	14%
	Rented House	25%	27%	24%	27%
	DoC (Campsite/Hut)	10%	17%	26%	13%
	Backpackers / Campground (Shared Facility)	18%	27%	40%	23%
Activity Insights	Tramping	31%	47%	58%	38%
	Short Walk	64%	60%	52%	63%
	Bird Watching	51%	51%	45%	50%
	Star Gazing	13%	17%	16%	15%
	Guided Tour	47%	28%	23%	38%
Areas Visited	Ulva Island	71%	58%	57%	66%
	Observation Rock	37%	35%	32%	35%
	Moturau Moana	12%	15%	12%	13%
	Rakiura Museum	46%	36%	25%	41%
	Rakiura Track	21%	35%	48%	28%
Been Before	Yes	33%	28%	20%	31%
	No	67%	72%	80%	69%
Will Return	Yes	92%	95%	95%	93%
	No	8%	5%	5%	7%
Experience rating (out of 5)		4.49	4.50	4.47	4.48

^a Some respondents did not complete the age question, so they have been excluded from this breakdown. However, their data will be reflected in the 'All' category. Percentage shown is percentage of visitors within the respective age bracket who completed both the motive for travel question and age question.

Younger (18–30) travellers tend to spend longer on the Island (4.1 days) and be undertaking fewer day trips (9%) when compared to the 50+ age group of 3.3 days and 14% respectively. This is not surprising given 58% of younger travellers came to the Island for tramping. In a similar trend to that observed in Table 3, 48% listed as having undertaken the Rakiura track, thus 10% must be travelling further afield into the longer tramps on the Island.

Older travellers tended to opt for shorter activities, largely closer to the main township, including Ulva Island (71%), Rakiura Museum (46%) and short walks (64%). They also tended to opt for commercial accommodation options, while younger travellers opted for those with shared facilities, such as backpackers, campgrounds and DoC huts. Age does not appear to have a measurable impact on the experience rating given by visitors.

Activity by visitor segment

Again, adopting the same visitor segments discussed above (family, professionals, mature and group travellers), we consider how their activity while on the Island may differ. Our younger travellers without dependents tended to stay on the Island longer (average of 4.1 days) while mature travellers spent less time on the Island (averaging 3.1 days). Mature travellers were also more likely to undertake a day trip to the Island (16%).

Table 7: Travel insight, by visitor segment

Segment		Family	(Young) Professionals	Mature	Group	All
Number of visitors		2,504	1,877	5,015	2,736	10,833
Portion of total visitors		23.1%	17.3%	46.3%	25.3%	
Average Length of Stay		3.7 days	4.1 days	3.1 days	3.8 days	3.6 days
Number of day visitors		13%	8%	16%	11%	13%
Accommodation Insights	Hotel, Motel, Lodge	25%	8%	45%	42%	34%
	Private House	16%	21%	15%	19%	14%
	Rented House	37%	10%	23%	34%	27%
	DoC (Campsite/Hut)	12%	20%	9%	11%	13%
	Backpackers / Campground (Shared Facility)	21%	26%	19%	25%	23%
Activity Insights	Tramping	36%	58%	28%	36%	38%
	Short Walk	71%	52%	63%	62%	63%
	Bird Watching	55%	46%	51%	57%	50%
	Star Gazing	15%	17%	14%	16%	15%
	Guided Tour	32%	25%	50%	40%	38%
Areas Visited	Ulva Island	65%	56%	72%	79%	66%
	Observation Rock	36%	31%	36%	21%	35%
	Moturau Moana	18%	12%	13%	11%	13%
	Rakiura Museum	38%	27%	47%	40%	41%
	Rakiura Track	28%	48%	18%	27%	28%
Been Before	Yes	36%	19%	32%	45%	31%
	No	64%	81%	68%	55%	69%
Will Return	Yes	96%	95%	91%	89%	93%
	No	4%	5%	9%	11%	7%
Experience rating (out of 5)		4.47	4.48	4.47	4.42	4.48

^a Some respondents did not complete the age question, so they have been excluded from this breakdown. However, their data will be reflected in the 'All' category. Percentage shown is percentage of visitors within the respective age bracket who completed both the motive for travel question and age question.

Over half of travellers in the professional age group (58%) travelled to the Island to go tramping. Again, this is reflected in the 48% who went to tramp the Rakiura Track. This group had the greatest proportion of first-time visitors to the Island (81%). Mature travellers and group travellers are less likely to return to the Island albeit only 9% and 11%

respectively said they will not return. Often this is listed for fatalistic reasons, i.e. they do not think they will have time to return in their lifetime, or have adopted a 'been there, done that' attitude, and does not necessarily reflect their experience on the Island.

Visitor Comments

Great South has reviewed 883 comments provided by visitors through the departure surveys. These were predominantly conveying a positive experience (616 comments) with only 268 comments³ reflecting either a negative experience or suggesting an improvement.

The positive comments overwhelmingly spoke favourably of the Island's community. They found locals to be friendly, kind, genuine hosts (189 comments). Very few comments noted locals appearing tired or stressed because of a busy season. Instead, many thanked and named local Islanders who went above and beyond and gave a personal experience.

Visitors' food experiences were approximately split with 73 comments relating to a positive food experience across the Island's restaurants, cafes, and local shop. Positive comments normally talked about the well-stocked local shop, the freshness of seafood and the price point of food. 87 negative comments related to a poor food experience on the Island. These largely related to either the lack of dining options (particularly when one operator was closed or fully booked), or visitors searching for local produce (namely seafood) and could not find any.

Visitors' comments also provided insight into some of the infrastructure and facility challenges on the Island, with 125 commenting on the matter. Specifically, several comments noted the lack of places to sit, suggested additional shelter out of the weather would be advantageous, and additional public toilet facilities. It was clear in some comments that visitors were not aware of public toilet facilities⁴, so this may be resolved by better signage as opposed to providing additional facilities. Visitors also commented on the diesel energy generation on the Island, suggesting this contradicts perceived Island values, with a strong preference to transition this to a renewable energy system. Positive comments mostly related to the state of infrastructure and walking tracks around the township.

Specific to infrastructure on public conservation land, overwhelmingly visitors commented on the state of the Rakiura track and need for repair on the "second day" (between Port William and North Arm Huts). Comments mainly pertained to the amount of mud on this section and lack of boardwalk. Several suggested more signage along this day of the tramp to help trampers understand how far along they are on the route.

Comments particularly relating to the cost of travel, food, and activities on the Island were approximately balanced between (13) positive and (16) negative sentiments. Positive comments noted the relative competitiveness of pricing of food and drink relative to the mainland, both through the Island's shop and restaurants. Negative comments normally related to pricing of activities and transport, with several comments focused on the expense of kiwi spotting tours. One comment suggested the visitor levy to the Island should be increased.

Transport connections to and from the Island challenged visitors' experience pertaining to the transport schedules. Several asked for a later ferry service in summer to make the most of their time on the Island, particularly when they were undertaking a day trip to the Island. One visitor noted a mismatch between ferry and guided tours.

Overwhelmingly positive comments on the Island's accommodation related to the high standard of cleanliness and facilities available in both commercial and non-commercial providers. Visitors particularly commented on interactions with accommodation hosts, and their welcoming nature. Negative comments around accommodation tended to focus on the

³ Some comments conveyed both a positive and negative sentiment, while some did not express any sentiment.

⁴ Specifically, comments asked for 24-hour access toilets or toilets located at the Halfmoon Bay wharf – both of which are available.

lack of availability (e.g., would have stayed longer), difficulty in finding it online and on the price point.

Several visitors noted the difficulty in finding information about the Island; many surprised and caught out at activities and accommodation being booked out. Some noted that smaller operators did not have a strong presence online, and struggled to find them and their activities, as they were actively seeking to “book local”. This particularly related to visitors attempting to book fishing charters. Others noted the challenge in planning food and meals, with restaurants quickly becoming booked out, and the shop closing relatively early. This is particularly challenging for a visitor arriving off the evening ferry service.

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Disclaimer

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