

Waiheke Island Visitor Survey Report

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Waiheke Island Visitor Survey Report

Executive Summary

“Waiheke is 93 sq km of island bliss only a 35-minute ferry ride from the CBD... On Waiheke’s city side, emerald waters lap at rocky bays, while its ocean flank has some of the region’s best sandy beaches. While beaches are the big drawcard, wine is a close second. There are 26 boutique wineries to visit, many with swanky restaurants and breathtaking city views. On top of that, the Waiheke Arts Trail encompasses 26 galleries and craft stores” (Lonely Planet website: <http://www.lonelyplanet.com/new-zealand/auckland-region/waiheke-island>).

Waiheke Island in the Hauraki Gulf is one of Auckland’s premiere tourist attractions. It is a very popular summertime destination, especially for families and small groups of friends. Tourists flock to the island each summer, expanding the resident population from 8,000 to over 30,000. Passenger ferry operator, Fullers, estimates that there are somewhere between 400,000 and 700,000 visitors to Waiheke every year.

Yet relatively little is known about the people who make the trip, what they do during their visit to the Island, or the contribution of tourism on Waiheke to either the Waiheke economy or the wider Auckland regional economy.

This report is based on a survey of visitors to Waiheke undertaken in January and February 2009 by researchers at the University of Auckland as part of a wider study of wine, tourism and sustainable development on Waiheke Island. It is the first survey of visitors to Waiheke conducted for five years.

A survey questionnaire was developed and administered on the Fullers passenger ferries operating between downtown Auckland and Matiatia Bay on Waiheke; and the SeaLink vehicle and passenger ferries operating between Half Moon Bay in eastern Auckland and Kennedy Point on Waiheke. 1141 travel parties responded, capturing the activities and experiences of approximately 3600 people, and the reasons they visited the island.

The survey results help to quantify some of the characteristics of Waiheke visitors, their patterns of behaviour, and the diverse issues relating to tourism development on the island. Waiheke attracts visitors to its beaches, its scenery and walking tracks, and its many cultural attractions, such as its locally produced wines and art. It is a popular day excursion and a holiday and weekend destination for Aucklanders, some of whom own baches on the island.

Visitor Profile

Four out of five parties surveyed were visitors to Waiheke. Among the visitors, 80% were New Zealand residents, and 91% were from the Auckland region. That is to say that 58% of all parties were Aucklanders visiting Waiheke.

Among international visitors, over 90% came predominantly from traditional western tourism markets: UK (40%), Australia (20%), 12% each from Continental Europe and the US, and smaller numbers from Canada, Asia and Latin America.

Waiheke is a destination for couples, families and small groups of friends. Nearly 90% of respondents were in groups of five or fewer, with 40% of total respondents travelling in groups of two (mainly with their spouse or partner).

Visitors were distributed evenly in terms of age except for the over-65 category, which comprises a wider age band but also includes those eligible for the SuperGold card scheme, under which card-holders can travel free off-peak on Auckland public transport including Waiheke ferries. Nearly one in five parties on Fullers and 13% of those on SeaLink travelled free by virtue of their SuperGold card.

Travel patterns

The proximity of Waiheke to Auckland (35 minutes by ferry from downtown) makes it an ideal destination for a day excursion. Two thirds of parties were day trippers (75% of those travelling on Fullers ferries and 46% of SeaLink parties, many of whom travelled with their vehicles and chose to spread the cost of ferrying their car over more than a single day).

Of parties who stayed overnight, one third stayed one night; half stayed two to three nights; and 10% stayed more than seven nights. Only a third of those who stayed used paid accommodation: 40% stayed with friends and relatives, and quarter in their own holiday home.

Waiheke enjoys a high level of loyalty from its visitors: three quarters of respondents had visited Waiheke before, and 92% of Aucklanders surveyed had previously visited.

A summertime destination: Waiheke's seasonal appeal

Waiheke has a firmly entrenched reputation as an appealing summer destination. Ferry operators report that the vast majority of visitors visit the island in summertime; and this is confirmed by survey respondents, most of whom are repeat visitors.

Visitors clearly see Waiheke as a summertime destination. Importantly, 20% of the respondents indicated that their visit to Waiheke was prompted by a special event; and events are promoted predominantly in summer. Nonetheless, a significant number of visitors see Waiheke as a year-round destination, with many seeing it as a day trip option during public or school holidays across the year.

The seasonality in the Waiheke visitor pattern creates difficulties. Demand for the ferries oscillates from summer holiday weekends where excess demand at peak times means that passengers face delays, to winter sailings with few passengers. Capacity constraints have multiple consequences, with summertime visitors experiencing queues for ferries (including having to wait for the next ferry at the busiest times), crowded buses, a shortage of taxis, difficulty in securing a reservation at restaurants or on tour parties, pressure on toilet facilities and a range of other effects.

Tourism operators (particularly ferry and bus operators) must juggle the pressures of sustaining quality at periods of peak seasonal demand, as well as sustaining services through the off-season. Restaurateurs and transport operators alike must meet demands from residents and sustain quality delivery in off-peak periods.

Enterprises on Waiheke relying on visitors must weather the winter months with dramatically reduced customer bases. Addressing issues relating to seasonality is a priority, and there are pressures for innovative initiatives to expand the tourist value proposition to all-season activities. The ferry companies both actively promote winter visits to Waiheke through a range of mechanisms.

The survey demonstrated that weather is a critical variable, even in summer. Visitor numbers were down on sailings in wet weather over the survey period. Moreover, survey responses clearly indicate that the weather affected people's enjoyment of their visit.

A substantial majority of visitors plan their visit in advance. Almost 60% of parties on Fullers and nearly three quarters of those on SeaLink made their decision to visit Waiheke more than a week in advance, whilst another third of those on Fullers and virtually all others on SeaLink made the decision in the week leading up to travel. Only 10% of Fullers travellers and 3% of SeaLink made the decision on the day.

There is of course no way to calculate how many planned to visit but changed their minds or cancelled as a result of poor weather, and we cannot be sure of just how fixed the plans were of those who chose to travel. However, it appears that a trip to Waiheke is a planned trip, which may give ferry, bus and taxi companies some new opportunities for dealing with peak demand.

Reasons to visit Waiheke

Two thirds of parties surveyed indicated that their main reason for visiting Waiheke was for one of a set of reasons that could be described as 'a holiday day out': attending a special event, wineries, restaurant/cafés, beaches, walking, 'holidaying' in general. 16% went specifically to visit friends and relatives, and 6% through a recommendation; and 12% for work purposes.

The range of activities that visitors actually undertook on the island shows that Waiheke is a combination destination that encompasses diverse attractions that can be combined into a day out on the island. Visiting beaches and walking the paths of Waiheke were by far the most popular activities undertaken by visitors. For those with beaches on Waiheke, the beaches and walkways register especially prominently in the decision to visit. Other visitors combine several activities in their day out.

Special events such as the Headland sculpture exhibition walkway and cultural attractions such as wineries and art galleries are a major drawcard. They help to enhance the appeal of Waiheke, providing a competitive edge in a region (and Auckland tourism market) blessed by many appealing natural attractions, especially given the cost of a Waiheke excursion compared to other options. The survey was conducted over the three week duration of the Headland exhibition. The Headland event (previously Sculpture on the Gulf) attracted over 25,000 day trippers and was highly commended. Weddings, parties and anniversaries also contribute to the attraction of Waiheke.

For the more than 15% of parties travelling on SuperGold cards, cost is not a barrier. An active day out capped by free special events is highly attractive. The scheme has been a key factor in attracting a group of travellers who might not have otherwise chosen to visit Waiheke.

Irrespective of the primary reasons visitors give for visiting Waiheke, more than half visit beaches and natural attractions. By the same token, the cultural attractions and special events are significant attractors, prompting people to visit at particular times. The record of what visitors actually did on the island as opposed to their stated prior reason for visiting the island, confirms that Waiheke is a combination day-out destination.

Wine tourism

Wine tourism is a key tourist attraction on Waiheke, although not often the only reason visitors choose to visit Waiheke. Only 6% of visitors cited 'visiting a vineyard' as their main reason for going to Waiheke, but of those who answered the specific questions on wine, 31% visited a winery (25% of all parties), and a further 7% would have liked to visit a winery but ran out of time.

The findings suggest that the wineries lure people to Waiheke and add lustre to the day out. They provide a focal point for the visit. They give Waiheke an edge in Auckland's day out summer tourism market, as well as attracting a much smaller specialist market of dedicated wine tourists.

Many of the leading restaurants on Waiheke are wineries and many visiting parties combined their winery visit with a meal. These visitors are still wine tourists attracted at least in part by the allure of the vineyard, winery, and wine tasting. Of those parties who visited wineries, two thirds visited just one winery. This means that one third or 7.5% of the total number of visitors visited more than one winery, qualifying them distinctively as wine tourists.

The Waiheke Wine Festival combines wine tourism with a special event. Held during the survey period over the Waitangi weekend in early February, it attracted 2,500 attendees. Targeted surveys were administered during that weekend to try to capture the tourism qualities of the event.

The surveys were less successful than hoped in capturing information about the Festival due to problems of timing and a low response rate on the ferry home. However, they did record concerns from festival-goers about the marketing of the event, the facilities, and the value for money of the day-out: the combined cost of ferry and festival tickets, given the product.

Expenditure on Waiheke

Expenditure figures collected from surveys of this sort need to be treated with caution, but they do provide an indication of spending patterns. Incorporating ferry tickets, transport, food, accommodation and other expenses on the island (excluding transport to and from the ferry on the mainland), the 1141 parties spent roughly \$250,000.

Among parties of fewer than ten members¹, the mean expenditure was \$314 per party, with 62% of parties spending less than \$200 on their visit. However the mean figure disguises a significant variation in party spending. One fifth of parties spent less than \$50, whilst one fifth spent in excess of \$500, with 10% of parties spending more than \$1000.

Expenditure reflects size of the party and length of stay. Of Fullers parties, the mean expenditure was \$115 compared with \$182 for those on SeaLink. The median is more revealing: \$50 for Fullers and \$100 for SeaLink.

The mean per capita expenditure for the dominant type of travel party - day-trippers in parties of less than 10 - was \$88 per capita. Although Waiheke is sometimes seen as a relatively expensive day out for family groups, the high proportion of day-tripping and the dominance of non-commercial accommodation for those who stay overnight mean that travel parties to Waiheke spend less than in other tourist destinations.

¹ Groups of ten or more are excluded due to the increased inaccuracy of expenditure data as party size increases.

The SuperGold initiative is contentious on Waiheke. The urban myth suggests that the SuperGold cardholder is a frail, penny-pinching traveller who struggles off the wharf with her thermos and sandwiches, goes for a short walk or boards a bus to Onetangi and returns to Auckland. Our results suggest that SuperGold holders were as active as other visitors, and whilst there is some truth in the lower than average levels of spending, many SuperGold parties spent considerable sums on the island. We found that half SuperGold parties spent less than \$50 per capita, but that 6 parties as a whole spent more than \$1000, and more than 60 parties spent over \$100. The heavy subsidisation of the scheme means that it may become a target for national spending reviews, but in its present form at least it is an important market niche for Waiheke and one that might be developed further by creative initiatives.

Rating the Waiheke experience

Visitors were overwhelmingly positive about their experience of Waiheke. Their responses highlighted the sources of Waiheke's popularity as well as identifying several areas ripe for improvement.

678 respondents chose to comment about services and infrastructure on the island. In all, 315 distinct negative comments were received (some respondents commented on more than one factor), with over half of these comments made by Waiheke residents who took the opportunity offered in the survey to voice their views on services and infrastructure.

More than half of the comments made in total related to transport (such as the cost of ferry tickets, pressure on facilities on hot summer days - from getting on the ferry to facilities on the wharf and the capacity and timetabling of buses).

All visitors must travel to Waiheke by ferry and then find further transport to their destinations (unless they are walking). Many are unaware of the geography of Waiheke attractions or even of what they plan to do once on Waiheke, and the extent to which they will need to rely on a public transport system that is stretched by issues of seasonality, uneven daily flows, and the challenge of meeting often conflicting public good and commercial objectives.

The ferries and the wharf are the point at which many people's concerns for the quality of their day out or the development of their island concentrate. The absence of low-cost food identified by many as a frustration, for example, turns attention to the cost of the ferry ticket, whilst wet weather also led visitors to be more critical of services and infrastructure. Cold, rainy days made respondents more likely to express concerns at various aspects of their visit to Waiheke and emphasised again the absence of wet-weather activities and Waiheke's fine-weather dependence.

Yet in overall terms, most visitors were happy with their Waiheke excursion. In particular, the natural beauty of the island and its beaches, the friendliness of locals, and the high quality of the dining experience were notable features in the comments elicited. As two respondents put it,

"It's hard to improve paradise"

"It was superb in every way"

Reinforcing the point, 85% stated that they would visit again, and 97% would recommend Waiheke as a destination to their friends and family.

Implications

Five key issues stand out from the survey research.

- Waiheke is an immensely popular destination among visitors
- Waiheke is predominantly a summertime destination
- Waiheke tourism relies heavily on repeat business from Auckland residents
- The appeal of Waiheke relates to a combination of natural and cultural attractions
- There are a number of significant over-capacity constraints in summer

The immense popularity of Waiheke among domestic travellers, its proximity to Auckland, and the high numbers of repeat visitors suggest that the pressures on the island's infrastructure from peak summer demand are likely to increase. The capacity issues already signalled in the negative comments of visitors are a significant concern, which must be addressed to sustain the reputation on which Waiheke tourism depends. Moreover, resolving these problems is essential if tourism on Waiheke is to develop sustainably (environmentally, socially and culturally).

At the same time, in talking to tourism operators, there are significant issues of under-utilisation of capacity in the off-season, which the survey results do not reveal. Addressing infrastructure requirements will require significant collaboration between stakeholders.

Universal problems of seasonality in tourism are exacerbated by transport issues specific to Waiheke. These occur both in terms of travel to the island and transport once on the island. Access to the island is by ferry, which is Waiheke's point of difference and an attraction in its own right, especially on a sunny day. However, because Waiheke is not on the way to anywhere people must travel there specifically, which means that there is no through traffic to target in the off-season. This can reinforce Waiheke's weather dependence, whilst the ferry ride can lose its appeal in bad weather.

Addressing the challenges of seasonality is a priority for all tourism operators. There are pressures for innovative initiatives to expand the tourist value proposition to all-season activities. The ferry companies, for example, now both actively promote winter visits to Waiheke through a range of mechanisms. Promotional efforts may seek to increase off-season tourism, perhaps working with tourism agencies and accommodation providers to produce a winter package that addresses the issue of wet weather activities (even positioning wine as a leader in that regard).

However, simply increasing the number of visitors is problematic. Not all stakeholders are keen to see tourism increased or its season extended. There is some opposition within the community to extended tourism, particularly in summer months where capacity issues impact on the daily lives of residents.

The survey reveals that visits to Waiheke tend to be planned. Whilst reassuring that visitors to Waiheke do plan their trips, this emphasises the significance of lines of communication between Waiheke's tourism enterprises and their markets. It also emphasises the opportunity to influence potential visitors, especially through web-based promotional material that reinforces Waiheke's reputation and communicates specific offers to tempt new and repeat business alike.

The survey demonstrates the central importance of wine to Waiheke's appeal. Each of the findings above is significant for wine tourism: seasonality, the type of visitor attracted to

Waiheke, their activity and expenditure patterns, how Waiheke is perceived by visitors, and issues of transportation, weather dependence, and seasonality.

For many summer visitors Waiheke is indeed the 'Island of Wine'. However, if Waiheke is to honour its advertised reputation and develop further as a wine tourism destination, then it needs to sustain a reliable and quality wine tourism presence year-round – for both existing levels of traffic and potentially new visitor flows. Monitoring the extent and impacts on this brand of capacity constraints at peak season and failures to deliver in the off-season is a priority, as is responding in creative ways and being seen to do so.

Further debate over tourism on Waiheke needs to be informed by further information. In particular, further survey work conducted in different tourism seasons is required, as is ongoing monitoring to capture what is a changing tourism landscape. Further strategic work is required to overcome some of the challenges relating to seasonality and to encourage the development of sustainable tourism of Waiheke that meets the different interests of the different groups involved.

Waiheke Island Visitor Survey Report

1. The context²

Waiheke Island in the Hauraki Gulf is one of Auckland's premiere tourist attractions. Half an hour from downtown Auckland by ferry, its beaches, scenery, and cultural attractions cause tourists to flock to the island each summer, expanding the resident population from 8,000 to over 30,000. Principal passenger ferry operator Fullers estimates that there are somewhere between 400,000 and 700,000 visitors to Waiheke every year. Yet relatively little is known about the people who visit Waiheke, nor about what they do during their visit to the island³. This information is vital for understanding Waiheke's tourism economy and its role in the Auckland tourism economy.

2. Survey Objectives

The need for the survey research emerged during the scoping of a broader study examining the development of wine tourism and the wine industry more generally on Waiheke, within the context of the development of the Auckland region. The University of Auckland study required basic data to be collected to provide a baseline on which to develop more sophisticated analysis of the processes at work. This reports the preliminary findings.

The specific research questions are therefore:

Who is visiting Waiheke?

What are the specific interests of these visitors?

How do they find their experience on Waiheke?

What is the significance of the wine component to Waiheke tourism?

Are there areas for improvement?

² The Waiheke Wine Tourism project is an independent research study undertaken through the University of Auckland Vice-Chancellor's Strategic Development Fund. This survey research is part of the larger project. It was supported by Fullers and SeaLink, and we would like to thank both companies and their staff for their assistance. We would also like to thank the Waiheke Winegrowers' Association and the Waiheke Wine Project Reference Group for their assistance. Thanks also to Brigette Priestley and Justin Westlake for their efforts.

³ The most recent report was produced in 2003: *Tourism on Waiheke Island: the views of residents and holiday-makers*, commissioned by Tourism Auckland from Ryan and Aicken, Department of Tourism Management, University of Waikato Management School.

3. Methods

Survey sites

The survey research was carried out on the ferries operating between Auckland and Waiheke Island in January and February 2009. Passenger ferries operated by Fullers run between downtown Auckland and Matiatia on Waiheke. SeaLink passenger and vehicle ferries run between Half Moon Bay (on the mainland in eastern Auckland) and Kennedy Point on Waiheke, with an additional Friday and weekend service from downtown Auckland. Fullers ferries are the principal means by which visitors access Waiheke from downtown. SeaLink ferries are used predominantly by visitors wishing to take vehicles to Waiheke, as well as foot passengers for whom Half Moon Bay is more convenient than downtown Auckland.

The questionnaire

The questionnaire (see Appendix) was developed and piloted in January 2009. A slightly modified version included vehicle data on the SeaLink ferries. The survey instrument comprised three sections: the first measured the experiences of visitors to Waiheke on that particular visit; the second measured visitors' experience of particular aspects of services on Waiheke; and the third measured socio-demographic data. Following basic adjustments to the survey in response to piloting, the survey was administered from 19 January to 22 February 2009. This period incorporated the peak summer holiday weekends (Auckland Anniversary and Waitangi).

The sampling

Surveyors approached visitors waiting in the queue for the city-bound ferry on Waiheke, at Matiatia (Fullers) or Kennedy Point (SeaLink). One person in each travelling party was asked to complete a questionnaire to record the activities of the party, and the completed questionnaires were collected by surveyors when the visitors disembarked. During the 35-45 minute voyage, surveyors walked through the ferry to assist with any enquiries.

This approach is the accepted form of sampling in surveys of this type. Parties travel together and decision-making is often made at the party scale. Surveying by party provides an accurate record of planning and travel patterns and activities and expenditure on the island. Limitations include the restriction of demographic details to

the person completing the form as well as restricted accuracy of data on larger groups. Where necessary, group data are distinguished in the report from individual data.

In all, 1141 survey forms were completed. 883 parties were surveyed on the Fullers ferries on the return trip to downtown Auckland; and 258 parties travelling on the SeaLink vehicle and passenger ferry to Half Moon Bay. This captures the activities of approximately 3625 people. We can establish a higher degree of certainty by excluding parties of 10 or more people. Larger groups carry higher degrees of uncertainty in the results due to effects including double-counting (for example two people completing a questionnaire that refers to the activities of the same party) and the likelihood that the person completing the survey is insufficiently aware of the activities and views of others in the party. Therefore we have confidence that the survey reports the activities of a certain 2524 individuals in groups of less than 10 people.

Surveys were carried out on 17 Fullers sailings and 10 SeaLink sailings. We have maintained the distinction between the ferry companies in much of the analysis so as to allow each of the two companies to review the activity profile of their own customers. Also, 60% of SeaLink parties (112) travelled with a vehicle, which has a significant influence on the nature of their activities on the island as well as their length of stay and type of accommodation.

Three aspects of the survey design have important effects on our findings and must be taken into account in interpreting the findings:

- surveys were conducted across the peak summer period (including the summer vacation season and the national Waitangi Day holiday weekend)
- surveys were mainly distributed on late afternoon ferries so as to capture the experience of day visitors
- surveys were distributed by hand to those willing to complete them

We are aware from qualitative work with tourism providers that tourist travel to Waiheke is extremely seasonal, and includes several distinct seasonal periods. Our findings relate to the peak season for domestic tourism. They are likely to overstate the significance of domestic and local Auckland tourism, the significance of summer

activities, day visits and repeat visitors, and overall numbers. Findings should not be held to be representative of other seasons.

Targeting late afternoon ferries to Auckland allowed us to capture day-visitors and exclude daily commuters from Waiheke, but risks overlooking those who may have stayed one or more nights and returned earlier in the day. Our figures understate the significance of travel by undertaken Waiheke commuters.

Distributing questionnaires by hand is likely to have increased the response rate, but may not overcome biases towards women (researchers noted that in couples and families, women are more likely than men to complete the questionnaire), nor the reluctance of non-English speakers to complete a survey and/or difficulties they may have experienced. Response rates were lower on more crowded ferries where confusion at the time of boarding made it difficult for surveyors to explain the survey and ask potential respondents to complete surveys.

4. Characteristics of the sample

The first question of the survey questionnaire identified Waiheke residents and asked them to proceed to Section 2 (Island Services). Nearly 80% of the parties surveyed were visitors. Of the visitors, 80% live in New Zealand, and of these, the vast majority (91%) are Aucklanders.

Just over 20% (229 respondents) of those who completed the place of residence question indicated that they were Waiheke residents - 22% of those travelling on Fullers and 17% of those on SeaLink. A total of 76 of the surveyed parties (46 on Fullers and 30 on SeaLink) own holiday homes on Waiheke, and 14 of these record themselves as living part time on the island (they are treated as residents in the findings). 886 parties identified themselves as visitors to Waiheke (Table 1).

Table 1: Visitors and Waiheke Residents

	Fullers		SeaLink	
Visitor	675	78%	211	83%
Waiheke resident	177	21%	38	15%
Part-time Waiheke resident	10	1%	4	2%

Visitors from beyond Auckland

A total of 62 New Zealand resident parties were visiting Waiheke from beyond the Auckland region. They were made up of two parties from Northland, 26 from the Waikato, 11 from Wellington, six from elsewhere in the North Island, and 17 from the South Island. Domestic tourists from beyond Auckland were outnumbered by overseas tourist parties. Of the 190 international parties, 172 registered their place of residence. Of these, 40% came from the United Kingdom, 20% from Australia, 12% each from continental Europe and the US, 9% from Canada, and eleven parties from Asia, Latin America and South Africa.

Previous visits

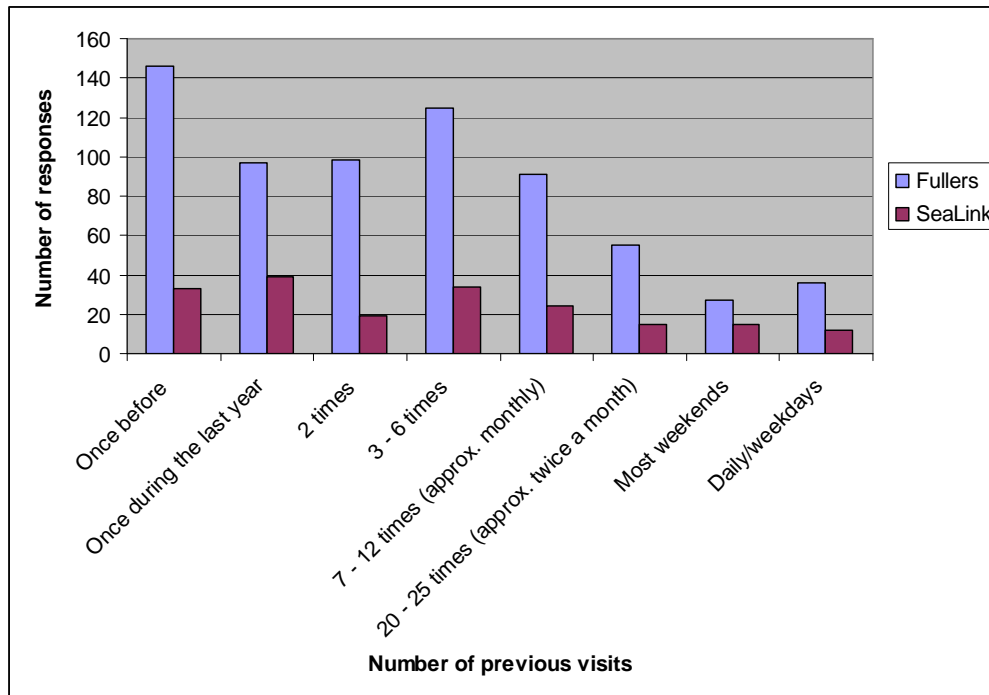
Almost three quarters of survey respondents had visited Waiheke previously, a figure rising to 92% for Auckland residents. Of those who had previously visited Waiheke, the largest group among Fullers respondents had been just once before. Not surprisingly, Sealink respondents were both more likely to have visited Waiheke before and had histories of greater contact (Figure 1)⁴.

Waiheke thus seems to be a destination for repeat visits, which suggests a loyal summertime visitor base. It also suggests that many visitors are familiar with Waiheke's offerings and infrastructure. This presents a different target market for tourism operators compared with first-time visitors: the former group may be looking to extend the horizons of their visit and may be attracted by something different, or alternatively this group may need to be catered for by operators in familiar ways.

At the same time, Waiheke clearly attracts new visitors. Indeed, for nearly a quarter of its visitors in the peak holiday period in 2009 (those who have never before or only once visited Waiheke), it was still a relatively novel destination. These visitors have greater requirements for information and need to be targeted differently.

⁴ Some respondents ticked more than one answer, meaning that the total responses add up to more than 100%.

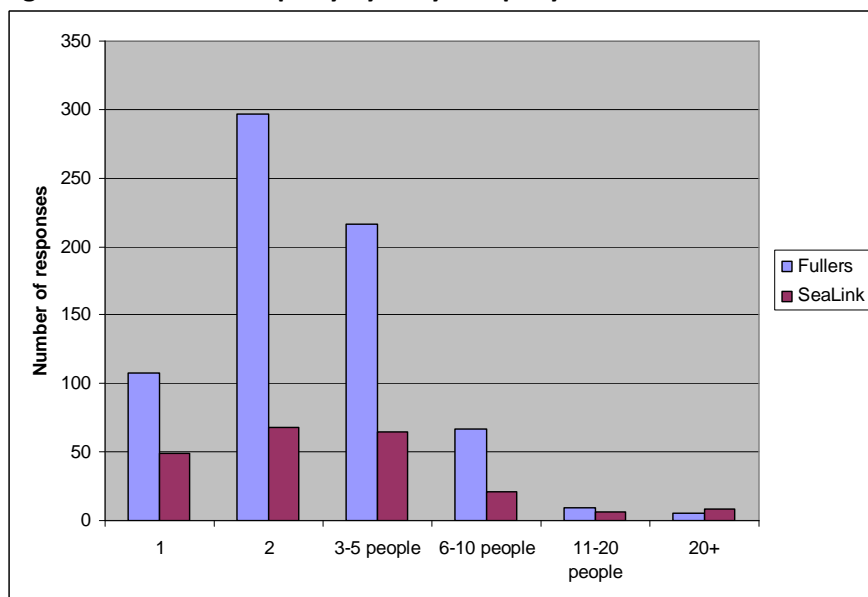
Figure 1: Number of previous visits to Waiheke



Size and composition of travel party

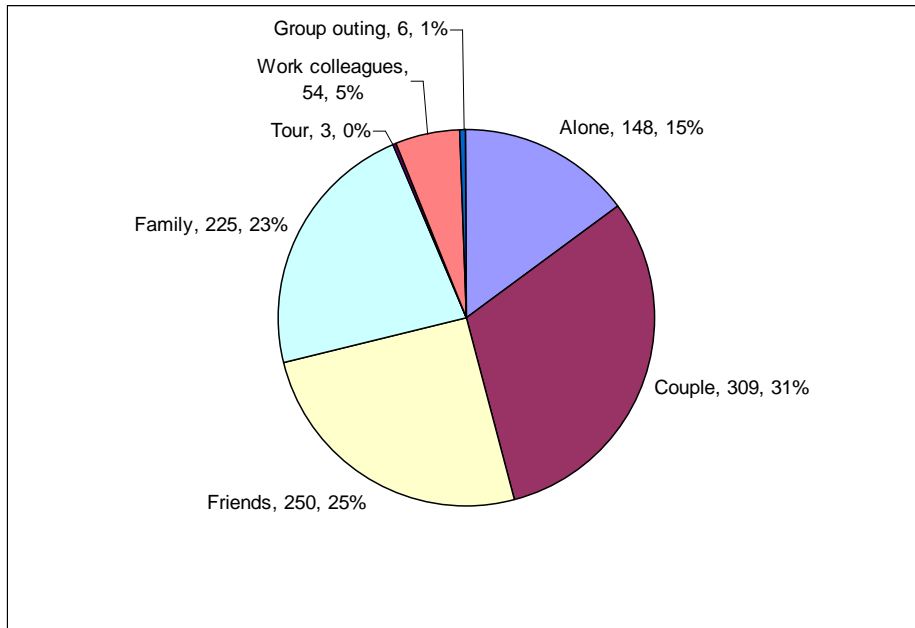
39% of parties visiting Waiheke (both domestic and international residents) travelled in parties of two (Figure 2), and 87% of parties comprised groups of five or fewer. Whilst parties of two followed by parties of 3-5 people were the most common on both ferry companies, a larger proportion relatively travelled alone on SeaLink ferries.

Figure 2: Size of travel party by ferry company



Almost one third of parties visiting Waiheke travelled with their partner or spouse, whilst another quarter travelled with friends, and just under a quarter travelled in family groups. 15% of visitors travelled alone, whilst 6% of travel parties were comprised of work colleagues and only three groups travelling with formal tours were surveyed (Figure 3).

Figure 3: Travelling companions



In proportion to other types of party, more visitors on SeaLink either travelled alone or in family groups than on Fullers ferries (Table 2). The figures confirm that travelling with a car on SeaLink can be a more economical option for families, especially if they want to participate in several activities, or to stay overnight. For other groups it provides an option for one individual to travel with a vehicle, leaving the wider group to return to downtown at a different time – as strategy that families often appear to adopt in school holidays.

Table 2: Travelling companions by ferry company

	Fullers		SeaLink	
	Count	Percentage	Count	Percentage
Alone	100	13%	48	20%
Partner	246	33%	63	27%
Friends	214	28%	36	15%
Family	160	21%	65	27%
Tour	3	1%	0	0%
Work colleagues	29	3%	25	11%
Group outing	6	1%	0	0%

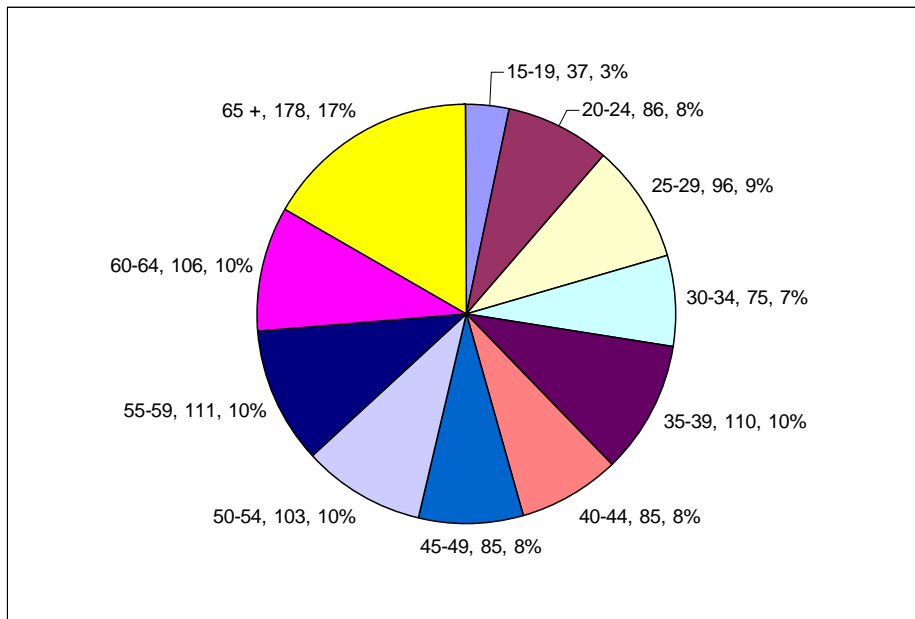
Age and gender

Respondents were asked to record details relating to age and gender. They were grouped into five year categories to correlate with Census data, from age 15 upward. Responses indicate the age of the person filling out the questionnaire. The results reveal that in peak season at least, Waiheke is a tourism destination for couples, families and small groups of friends of all ages (Figure 4). The numbers of visitors in each cohort is fairly evenly distributed except for the over-65 age group. Whilst the over-65 age band includes a higher proportion of the total population than other bands, the leap in numbers of respondents in this band also suggests that our survey captured the impact of the SuperGold card scheme.

The SuperGold card was introduced by the government in 2008, granting New Zealand residents of 65 and over certain privileges in terms of public transport. Card-holders can travel free on public transport in Auckland, including Waiheke ferries, after 9am on week-days or any time in weekends. On the Fullers ferries, 18% of visitors (106 parties) travelled free by virtue of their SuperGold card; while on SeaLink ferries, 13% (31) travelled free.

With the exception of the spike evident in the over-65 age band of domestic visitors, the age pattern among international visitors mirrored the pattern. Whilst we cannot assume that the age of the respondent represents the ages of the party, the relatively even spread of respondents across the age brackets and the high number of parties comprised of couples and friendship groups allow us confidence that Figure 3 captures the age spread of the sample.

Figure 4: Age bracket of respondents



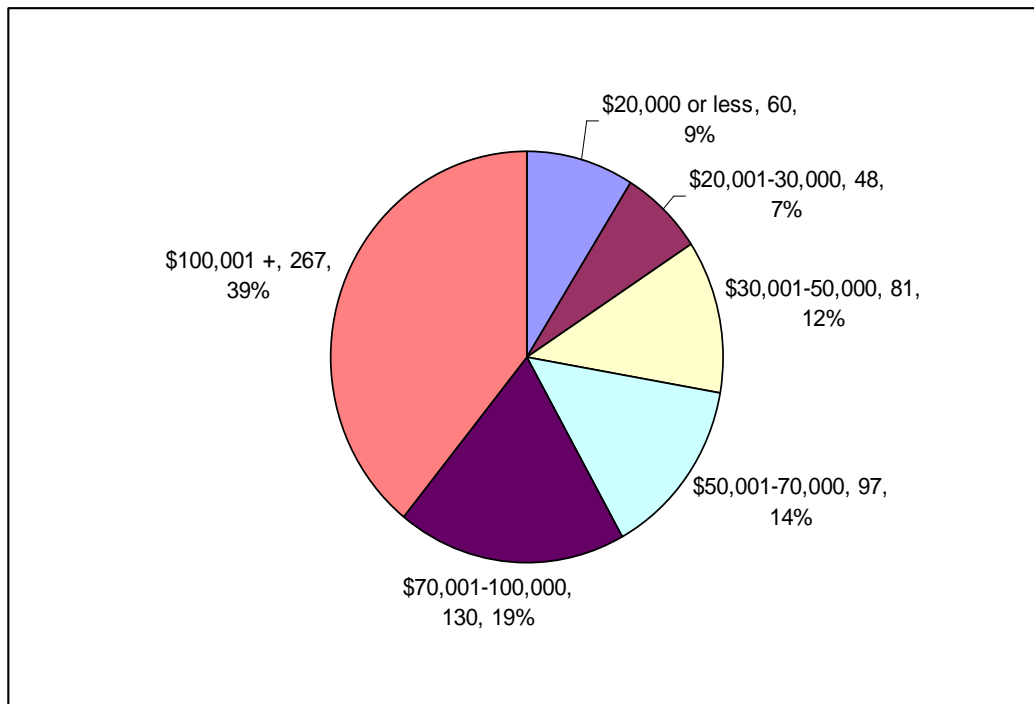
More women (56% of the sample) than men completed surveys, but we are unable to comment on the gender breakdown among visitors more generally. This may reflect the sampling strategy. Surveyors noted that when couples were asked to complete a questionnaire, women seemed more likely to take the pen. In addition, our principal surveyor is female, which may have contributed to the effect. Fortunately, nothing emerged from the research to suggest that the responses across the survey were gendered in a significant way - and we did achieve a 44% male response.

Household Income

Visitors to Waiheke are generally wealthier than the New Zealand population at large⁵. Excluding all parties with more than five members so as to enhance the accuracy of responses, nearly 39% have a household income of more than NZ\$100,000 and a further 19% have an income of more than \$70,000 (Figure 5). International visitors tended to have even higher household incomes, with 55% recording an income of \$100,000 or more.

⁵ The median household income in New Zealand was \$57,947 in the year to 30 June 2008 (<http://www.stats.govt.nz/products-and-services/media-releases/household-economic-survey/household-economic-survey-income-jun08year-mr.htm>).

Figure 5: Household income from parties of 5 people or fewer (683 travelling parties)

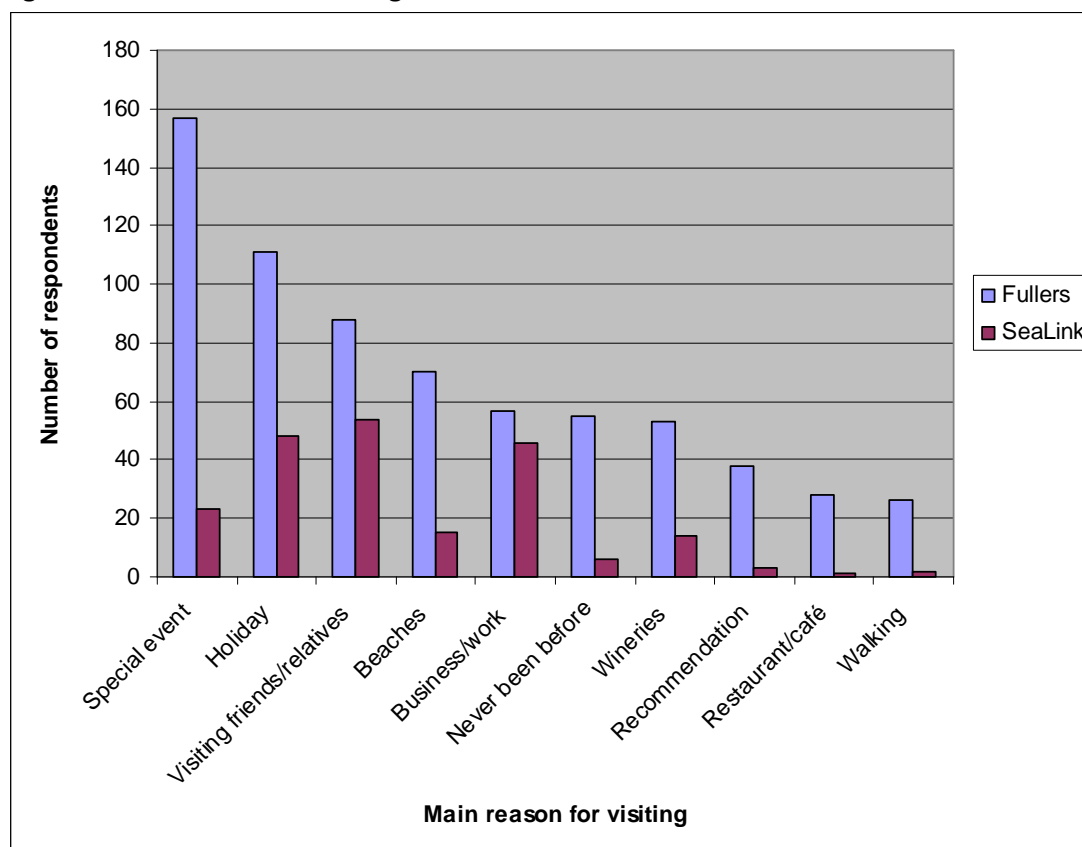


5. Visiting Waiheke

Motivation for visiting Waiheke

Respondents were asked to give their main reason for visiting Waiheke on this trip (see Figure 6). For nearly three quarters of respondents, these reasons can broadly be categorised as ‘a holiday day out’ (incorporating the categories of special event, wineries, restaurant/cafés, beaches, walking, and ‘holidaying’ more generally). 16% went to Waiheke explicitly to visit friends and relatives, and 12% went for work purposes.

Figure 6: Main reason for visiting



A significant 20% listed ‘attending a special event’ as their main reason for visiting Waiheke. This was most significant among parties travelling on Fullers ferries (Table 3), over half of whom were visiting the Headland sculpture exhibition. By contrast, SeaLink travel parties were more likely to be motivated in roughly equal measure by visits to friends and relatives, a general holiday, or business.

Table 3: Main reason for visiting by ferry company

	Fullers		SeaLink	
	Number	Percentage	Number	Percentage
Special event	157	23%	23	11%
Holiday	111	16%	48	23%
Visiting friends/relatives	88	13%	54	25%
Beaches	70	10%	15	7%
Business/work	57	8%	46	22%
Never been before	55	8%	6	3%
Wineries	53	8%	14	7%
Recommendation	38	6%	3	1%
Restaurant/café	28	4%	1	1%
Walking	26	4%	2	1%

The Headland exhibition (previously known as Sculpture on the Gulf), which runs for three weeks biannually in late January/early February, is more accessible from Matiatia

either on foot or on shuttle buses provided. It is one of several high-profile events held on Waiheke over the summer. Others include the Waiheke Wine Festival (a single day event on the Saturday of Waitangi weekend), and a variety of concerts and dance parties. Waiheke has also become an extremely popular location for wedding celebrations.

A planned excursion

Respondents were asked when they had made the decision to come to Waiheke on this trip. The vast majority of people had decided to visit Waiheke more than a week in advance, particularly those travelling on the car ferries (59% of Fullers parties and 73% of SeaLink parties). Just 10% of Fullers and 3% of SeaLink parties had made their decision the very morning of their trip (

Table 4).

Table 4: When decision was made to visit Waiheke

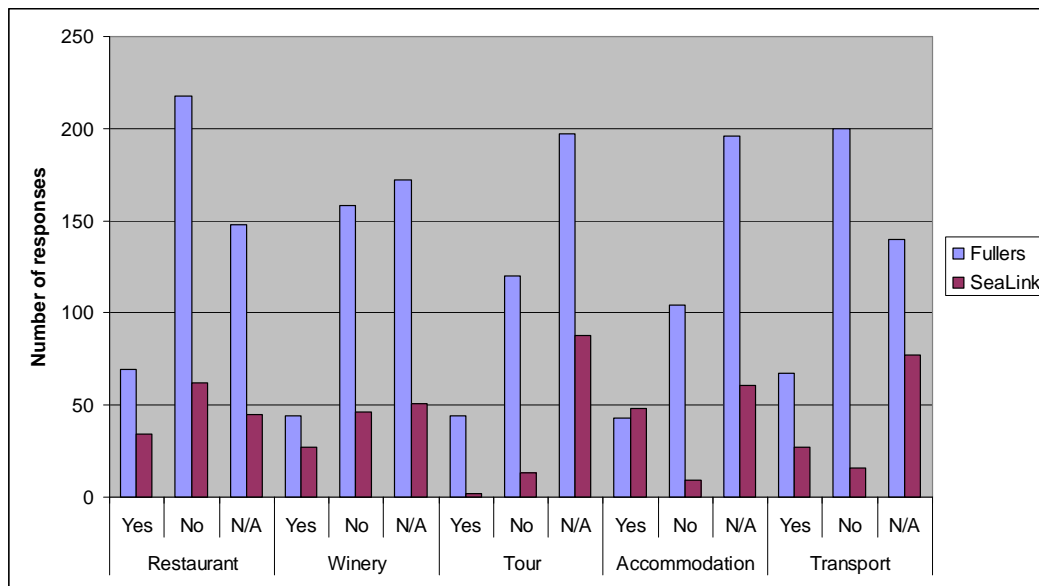
When decision was made to visit Waiheke	Fullers		SeaLink	
This morning	97	10%	9	3%
Last week	307	31%	67	24%
More than a week ago	580	59%	201	73%

It is important to note that ‘planning’ has different connotations for different people. We do not know how whether these plans were firm or how many had made plans and then decided *not* to visit Waiheke, especially if the weather was bad.

The weather is a highly significant variable influencing the experience of visitors to Waiheke. The absence of wet weather activities is recognised by tourism operators as a weakness in the Waiheke tourist product. This is well known by those who know the island, commented upon in guidebooks, and reflected in promotional material, which emphasises beaches and sunshine and says little about the weather. It is also reflected in travel patterns, with numbers of visitors falling on wet days, and in the quality of the tourism experience on the island and the reflection of visitors upon it (see below)

Despite the widespread planning to make an excursion to Waiheke, few respondents made a booking in advance for restaurants, wineries, tours, transport or accommodation (Figure 7). This led to disappointment on busy days when wineries, restaurants and tours were over-subscribed (see comments section below).

Figure 7: Reservations made in advance



It is not usually possible to reserve seats on the Fullers ferries in advance, but advance bookings are possible and advisable for those wishing to take a car to Waiheke – especially in peak season. Once again, SeaLink visitors were relatively more likely to plan by making a booking. It appears that either the act of or investment in bringing a vehicle to the island encourages more thorough planning.

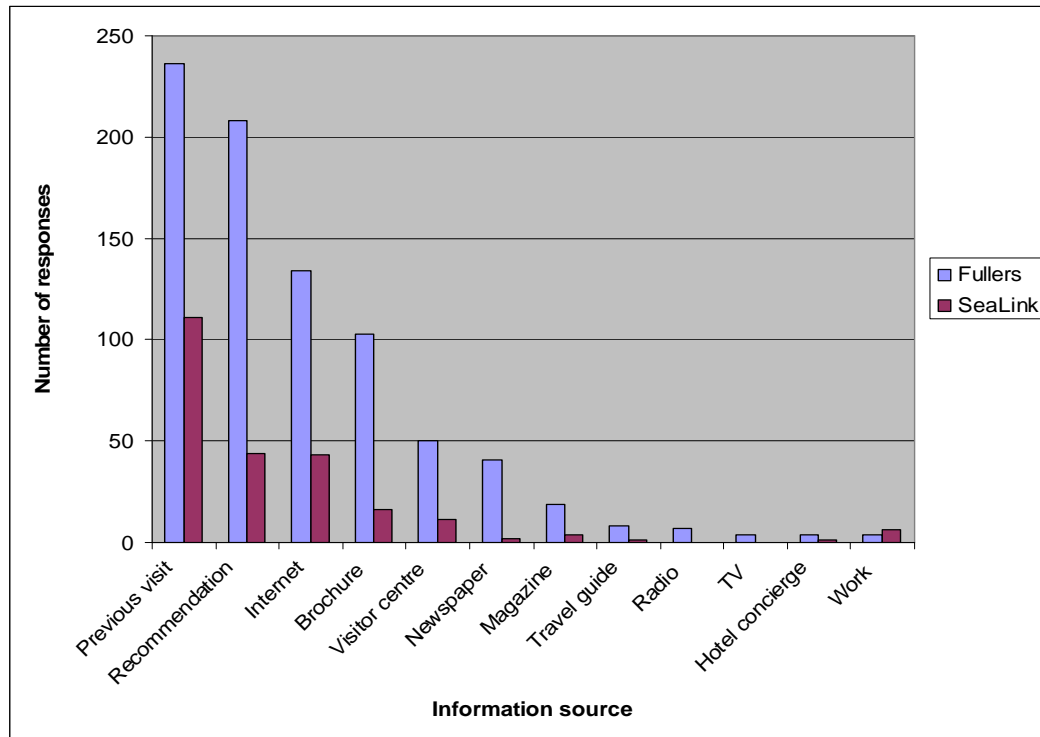
The substantial amount of pre-planning suggested by the surveys has implications also for designing possible new fare structures (early bird or late fares for example), as well as for establishing lines of communication between prospective visitors and wine tourism operators that might help with planning to overcome both capacity constraints and off-season service issues.

Information sources

Planning implies information. Respondents were asked where they derived information about Waiheke to plan their trip, and were invited to list as many sources as appropriate (Figure 8). The single most important information source was knowledge derived from previous trips (especially on Fullers), followed by recommendation. This clearly reflects the large number of repeat visitors, especially Aucklanders who have come to know and enjoy the island. It again suggests that Waiheke meets the expectations of its visitors, who keep returning to enjoy its features, and that it has a strong reputation as an

excursion destination. It also exposes the challenge of reaching these visitors and feeding new information into their knowledge networks and refreshing their understandings of what else Waiheke has to offer.

Figure 8: Sources of information for planning this trip



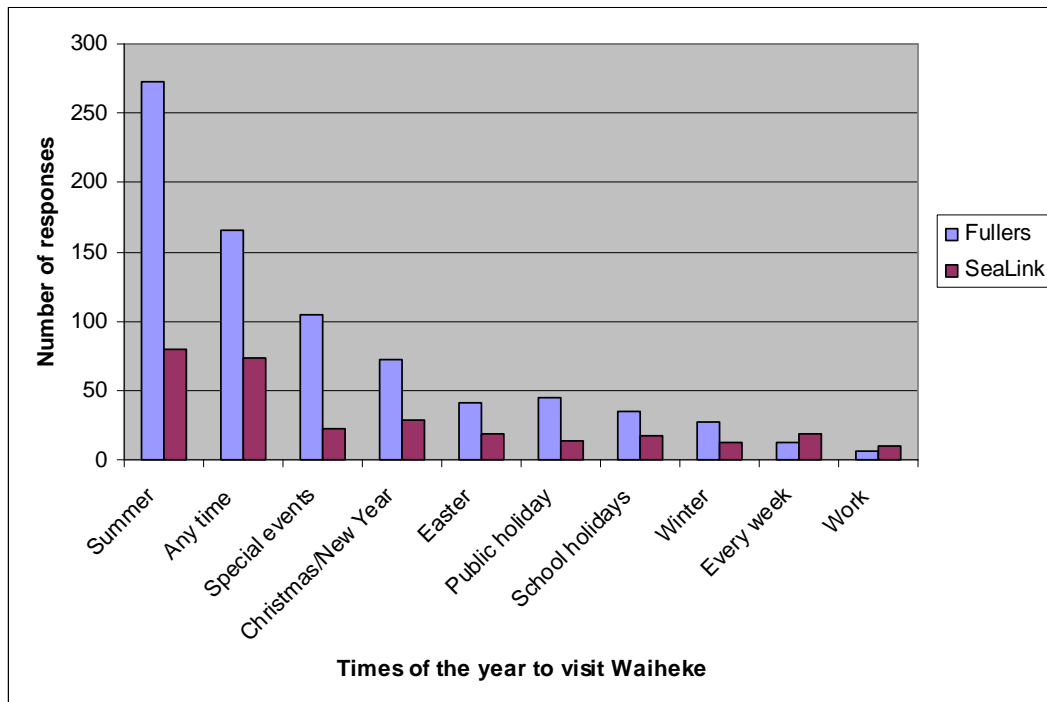
For those seeking new information or confirmation from other sources, the internet was the most important source, followed by brochures, the visitor centre, and the popular media. This breakdown has important implications for tourism operators seeking to optimise their advertising and for tourism organisations seeking to promote Waiheke more effectively. With such a high proportion of trips planned in advance, the internet is clearly a crucial medium – as is breaking into networks of prior knowledge.

A summer-time destination

Seasonality is a critical issue for tourism businesses operating on Waiheke, as in most tourism destinations. The appeal of a ferry ride to an island of beaches and wine is much greater on a sparkling sunny summer’s day than it is in the rain or in winter. Our results confirm this view of Waiheke as a summertime destination, although surveying in only one season does not allow us to compare seasons and fully measure the effects.

Visitors who had previously been to Waiheke were asked whether they tend to visit at particular times of year (respondents could indicate as many times as appropriate). By far the largest group listed 'summer' (Figure 9). A significant group of respondents also indicated that they visit Waiheke to attend 'special events' (the main reason for the visit of 20% of respondents), which are again largely summer occasions.

Figure 9: Particular times of year repeat visitors come to Waiheke



Key informants among Waiheke tourism operators confirm that there are distinct tourism seasons in Waiheke: the peak season of January and February, an extended summer season from mid-February to Easter in which international visitors are more prominent, the winter season from Easter (or later, if summer weather persists) to Labour Weekend, the domestic corporate hospitality (and early domestic tourism season) period of November to December. There are measurable differences in the profile of visitors in each season, and there are likely to be differences in the reasons why they travel to Waiheke, their expectations, how they plan, and what they do. This requires further research.

6. What visitors actually do on Waiheke

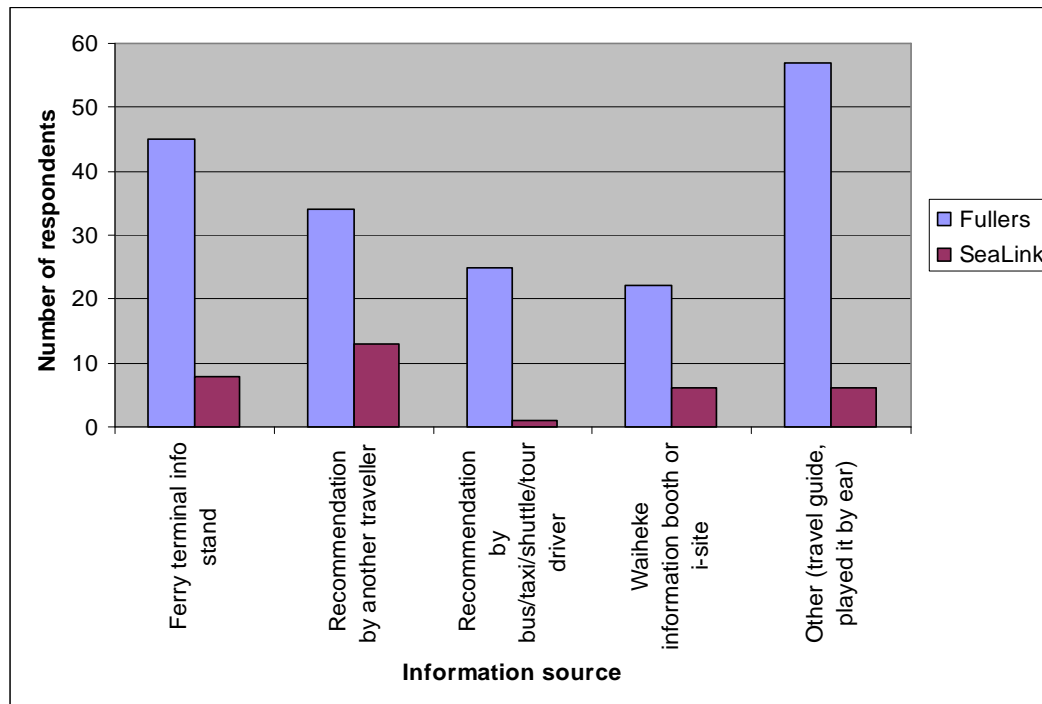
Beginning the day

When asked about their specific plans for their trip, 80% of Fullers respondents and 86% of SeaLink respondents claimed to have known in advance what they were going to do on Waiheke when they arrived (as a result of prior knowledge and planning). However, nearly 20% of visitors arrived on the island *not* knowing what they were going to do when they stepped off the ferry. The survey prompted respondents from these parties to indicate how they made their next move (Figure 10). The Matiatia ferry information stand was an important source of information for Fullers parties, as were recommendations from other travellers and the bus and taxi/shuttle drivers in particular⁶. Some consulted travel guides (presumably having brought them to the island), with Lonely Planet cited as a useful resource⁷. Others described their approach as ‘playing it by ear’. There are clearly opportunities in this regard for tourism operators to communicate with visitors either at this point or prior to arrival, and to enhance the Waiheke experience by eliminating any inefficiencies and anxieties brought on by the uncertainty.

⁶ The friendliness of taxi and bus drivers was widely noted in the general comments section of the survey.

⁷ The popular Lonely Planet Guide, for example, gives an informative and glowing review of Waiheke (<http://www.lonelyplanet.com/new-zealand/auckland-region/waiheke-island>).

Figure 10: Information sources on Waiheke for visitors who did not pre-plan



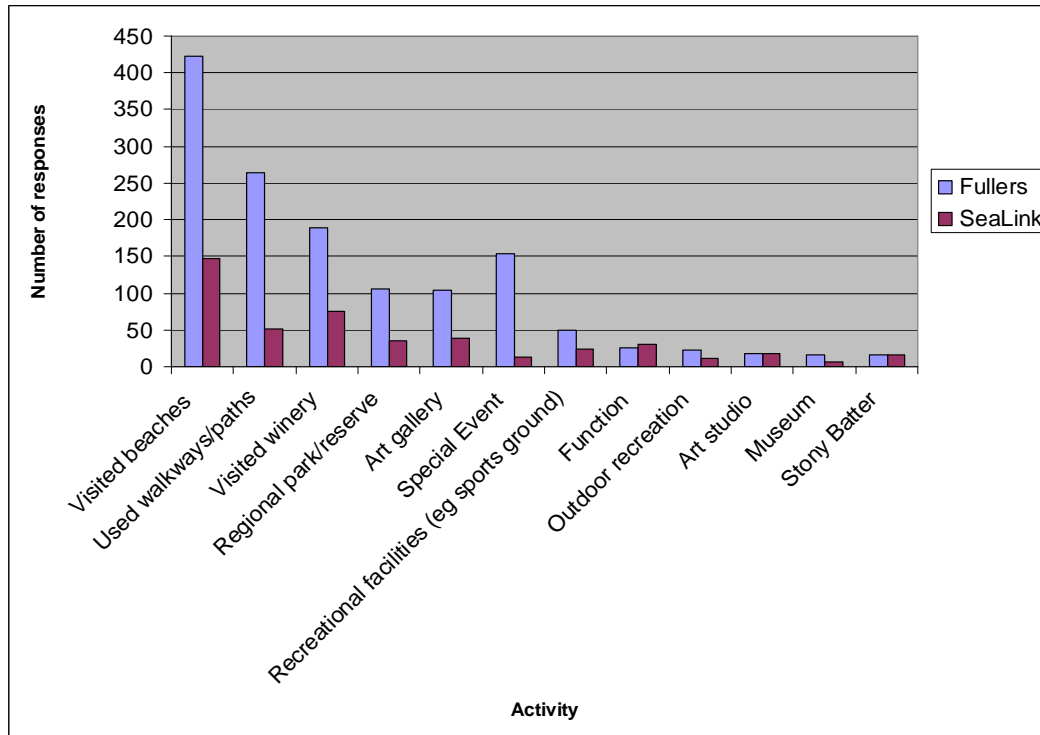
Activities undertaken on Waiheke

The activities undertaken by visitors do not necessarily map neatly on to their primary motivation for visiting a particular destination. In the research design we deliberately forced respondents to identify their primary motivation for visiting Waiheke early in the questionnaire so as to generate an uncomplicated measure of the popular conception of Waiheke as a destination (see Table 3)⁸. However, as we expected, the activities undertaken reveal Waiheke to be clearly a ‘combination destination’, where people undertake a range of activities (Figure 11). Respondents were asked to record all the activities in which they participated.

Waiheke’s beaches have been an attraction for visitors from Auckland since the 1860s. The survey reveals that this appeal persists. Half of all sampled parties visited the beaches (570 parties), whilst more than a quarter used the walkways and paths (the Headland sculpture exhibition required visitors to walk a coastal path). 264 parties (23%) reported that they visited a winery (264 parties). Other cultural attractions and physical activities were also popular.

⁸ The question was worded to try and capture a conception of Waiheke prior to travel, even though we recognised that it would be a retrospective answer, given further retrospection by the extent of prior engagement with the island we uncovered through the survey.

Figure 11: Activities undertaken on this trip



The ‘combination destination’ effect is illustrated by the fact that while just 6% stated that visiting a winery was their main reason for visiting Waiheke, 25% *did* visit at least one winery. Similarly, 7% said that going to the beach was their main reason for visiting Waiheke, yet 50% of the entire sample actually did visit at least one of the beaches.

Figure 11 confirms that tourists travelling on SeaLink and with access to a vehicle are likely to engage in a greater range of activities across a greater area of Waiheke. Relatively, Fullers parties concentrated their visits on activities at the western end of the island (beaches, walking, wineries), although a number did make their way to Stony Batter at the most remote end of the island, requiring access to a vehicle (either rented or through friends or relatives).

Nearly two thirds of those who answered the question (496 respondents) indicated that there was nothing that they would have liked to do but didn’t or couldn’t (Table 5). Of those who would have liked to have done more, most ran out of time or were thwarted by the weather. The largest group (71) would have liked to visit a winery.

Table 5: Activities that parties would have liked to do but couldn't/didn't

	Fullers	SeaLink	Total
Visit a winery	61	10	71
Stay longer	34	6	40
Visit the beaches	35	4	39
Walk	25	8	33
Swim	25	6	31
Visit sculpture exhibition	21	1	22
Experience sunny weather	16	6	22
Kayak/dive/fish	11	6	17
Explore further	12	2	14
Visit a gallery	11	2	13
Visit Stony Batter	11	2	13
Take a tour	10	3	13
Eat somewhere reasonably priced	9	2	11
Hire a scooter/bike	8	2	10
Drive around island	6	1	7
Visit market	4	3	7
Ride a horse	6	0	6
Eat an icecream	6	0	6
Visit Wine Festival	6	0	6

Transport

Respondents were asked to identify each of the forms of transport they used on Waiheke (they were able to identify more than one form). Public buses and walking were clearly the forms of transport most commonly used, although there is a significant difference between the forms of transport used by visitors using the different ferry companies. Of those who walked, the survey did not capture whether this was by choice or reflected the absence of other options (for example, missing buses or because of excess demand for taxis).

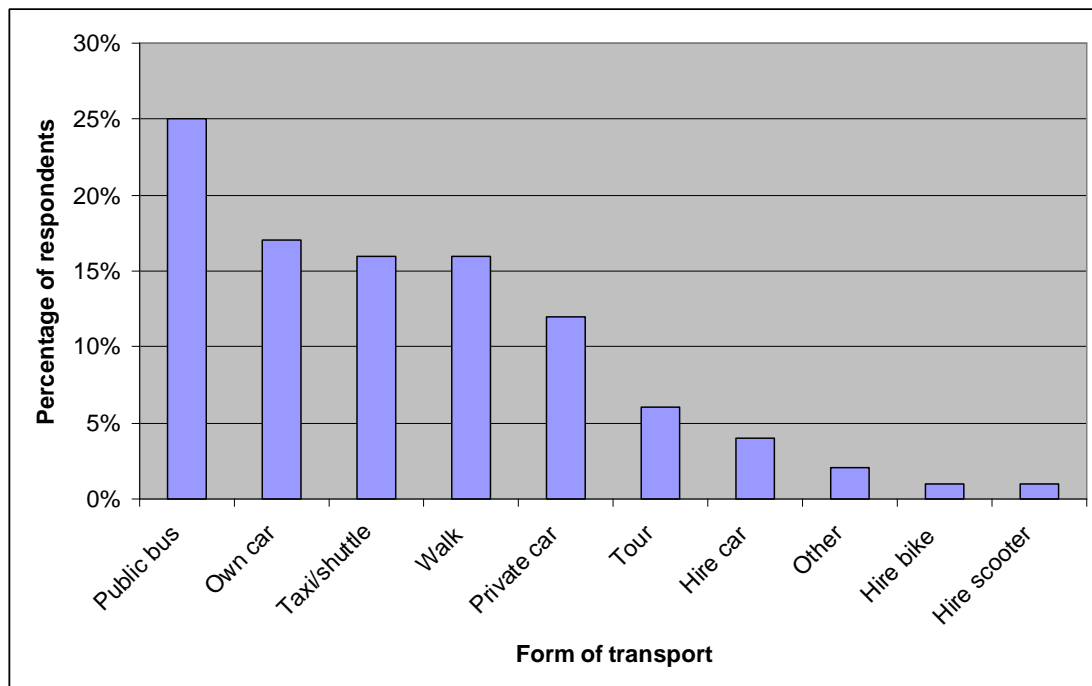
Among Fullers respondents, buses were the most commonly used form of transport (275 parties used the buses: 40% of those responding to the question). All Fullers ferries are met by buses which are timed to arrive at the Matiatia wharf to deliver passengers for returning ferries and depart within a few minutes of each ferry arrival. More than a quarter of those responding to the question indicated that they had walked, which is an option from Matiatia to take in the western beaches or walk up to Oneroa. This number also reflected the popularity of the Headland sculpture exhibition, which required people to walk (79 parties surveyed on Fullers visited the exhibition).

Taxis or shuttles were also important for Fullers passengers (21% of those responding), as were private cars. 83 parties (12%) used their own car (presumably either a car based on Waiheke or transported from Auckland on SeaLink with another party member), 9% took a tour and smaller numbers hired cars, bikes, or scooters. Of those who specified 'other', some brought their own bikes on the ferry, and others hitchhiked.

Bus transport is less accessible for SeaLink passengers who arrive at Kennedy Point which is not serviced by the bus network. 55% of SeaLink parties who responded to the question brought their own car, while 14% caught a taxi or shuttle. Smaller numbers used a private car (based on the island), walked, or took a tour or a bus.

Figure 12 summarises the relative significance of different transport forms used by visitors on Waiheke. The numbers taking tours is notable, while the numbers walking reflects much of the distinctiveness of Waiheke's tourism offering and patterns.

Figure 12: Forms of transport used (percentage of overall sample)



Eating on Waiheke

Respondents were asked about their eating arrangements on Waiheke. Just over a third (429 parties) ate at a restaurant or café (excluding wineries), 17% ate at a winery and 14% consumed takeaway food, while 35% brought their own picnic.

Respondents who dined at a restaurant/café or a winery were then asked to rank their experience in terms of quality of food, quality of service, and value for money, using a three point scale (unhappy, neutral, or very happy). Table 6 shows that Waiheke’s cafés and restaurants generally performed well in terms of the quality of food, with few customers disappointed with their experience. Overall, more than three quarters of parties were ‘very happy’ with the quality of the food. However, respondents were less impressed by the value for money of their eating experience, with 14% of those eating in wineries and 18% of those eating elsewhere unhappy. The shortage of low-cost lunch and coffee venues was cited repeatedly in the comments section (see below).

Table 6: Satisfaction with restaurant dining experience

	Quality of food		Quality of service		Value for money	
Restaurant/café (excl. wineries)						
Very Happy	339	74%	306	67%	253	55%
Neutral	84	18%	83	18%	122	27%
Unhappy	36	8%	68	15%	84	18%
Winery						
Very Happy	196	81%	185	78%	146	62%
Neutral	31	13%	35	15%	58	24%
Unhappy	14	6%	17	7%	33	14%

Wineries out-performed other restaurants and cafes on all indicators, with roughly four out of five customers more than happy with both the quality of the food and the service. As was the case at other Waiheke cafés and restaurants, respondents were less convinced by the value for money of their experience.

Length of stay on Waiheke

Just over two-thirds of visitors (68%) were day trippers, while 32% stayed at least one night on Waiheke. Waiheke is clearly a popular day trip destination because of its proximity to Auckland, although this may also reflect the cost and limited availability of accommodation on Waiheke (see below). Of the 305 parties who stayed overnight on Waiheke, 30% spent just one night, 51% spent 2-3 nights, 10% spent from 4-7 nights, and 9% more than a week

These figures differed between the ferry companies (Table 7). Three quarters of respondents on Fullers were day trippers compared with a much lower 46% of visitors on Sealink. Fullers ferries are the obvious option for day trippers from most of Auckland. They depart from the convenience of downtown Auckland and pull into

Matiatia, which is close to Oneroa, the hub of much of Waiheke’s activity as well as public transport options. The short ferry ride makes Waiheke an easily accessible day trip for Aucklanders. By contrast, SeaLink is the preferred option for those who wish to bring a vehicle to Waiheke and see more of the island and spread transport costs whilst on the island. Once the decision to ferry a car on SeaLink is taken (during the peak season the cost is \$130 return plus a ticket for each passenger), it makes sense to stay overnight – and vice-versa.

Table 7: Length of stay by ferry company

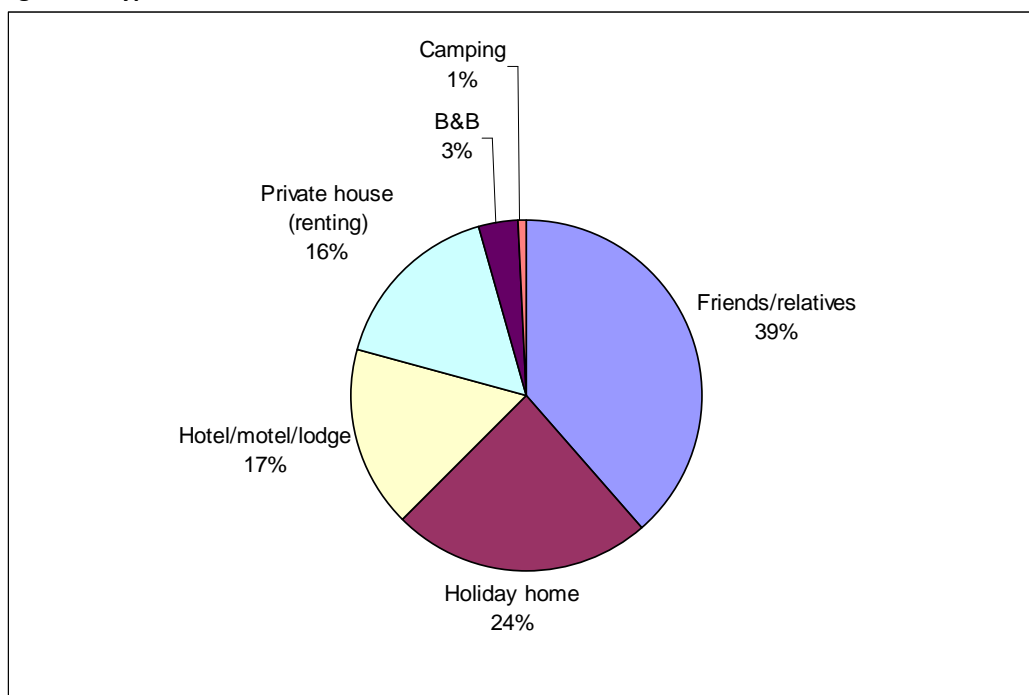
	Fullers respondents		SeaLink respondents	
	Number (n=182)	%	Number (n=123)	%
One night	67	37%	25	20%
2-3 nights	87	48%	69	56%
4-7 nights	9	5%	22	18%
>7 nights	19	10%	7	6%

Accommodation

Of the 305 respondent parties that stayed overnight on Waiheke, only 37% stayed in commercial accommodation. The largest group (39%) stayed with friends and relatives (Figure 13); and almost quarter (24%) stayed in their own holiday home. Of those who paid for their accommodation, 17% stayed in a motel or lodge, 16% rented a private house or bach, 3% stayed in a bed and breakfast, and 1% camped. Out of the entire sample, just 3 parties camped, perhaps reflecting the isolated nature of the only camping ground, which is at the Whakanewha Regional Park.

Nearly 45% of Fullers parties stayed with friends and relatives, dovetailing with their one night stay profile (Figure 13). By contrast, only 29% of SeaLink parties stayed with friends and 45% stayed in motels or rented private houses – matching their greater propensity to stay for several nights.

Figure 13 Type of Accommodation



Accommodation choices and decisions over length of stay are also conditioned by availability. Table 8 details accommodation options listed on the WaihekeNZ.com website. Whilst it excludes the private homes of visitors’ friends and families (which account for 39% of accommodation used by surveyed travel parties) and informal rentals of private homes, it reveals the paucity of accommodation options on the island. The absence of hotels stands out⁹. Key informants on the island argue that it acts as a constraint on many forms of tourism.

Table 8: Forms of accommodation available on Waiheke

Form of accommodation	Number available
Backpackers	5
Bed and breakfast	19
Boutique	3
Luxury	18
Lodge	2
Self-contained (includes apartments and private houses available for rent)	90
Motels/resorts	3
Camping ground	1

Source: http://www.waihekenz.com/accommodation/waiheke_island_accommodation_categories.html

⁹ There is currently a proposal afoot to build a five star hotel at Isola Estate, backed by the Langham Hotel group, although it appears that this development is on hold in the current global economic environment.

Expenditure

Respondents were asked to estimate the expenditure of their travelling party by expenditure band. Measuring spending by all members of the group is the usual approach in studies of this kind and works particularly well for families travelling together or when one person is responsible for spending (Stynes and White, 2006¹⁰). The use of a spending band allows respondents to nominate a general expenditure level.

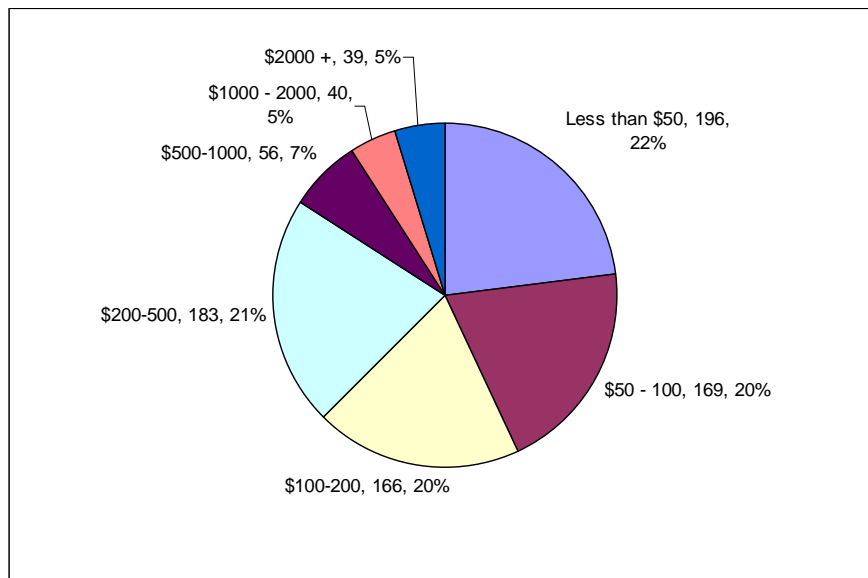
The accuracy of expenditure data derived in this way rests on the recall of respondents, and their knowledge of spending of the party as a whole (Stynes and White, 2006). Typically in this type of survey, respondents underestimate their expenditure, commonly forgetting items or being unaware of all expenditure within their party. To enhance accuracy, participants were prompted to consider ferry tickets, accommodation, pre-bookings, food, transport, activities and souvenirs.

Expenditure results need therefore to be interpreted with care. Nonetheless, the large sample size gives us some confidence as do the patterns recorded, which we are able to explain. The systematic differences between Fullers and SeaLink, are a further indicator of accuracy.

Survey results show that spending among parties is fairly evenly distributed across expenditure bands, with roughly one fifth of parties spending less than \$50, \$50-100, \$100-200, \$200-500, and over \$500 respectively (Figure 14). Significantly, 62% of the travelling parties surveyed spent *less than \$200* on their visit to Waiheke.

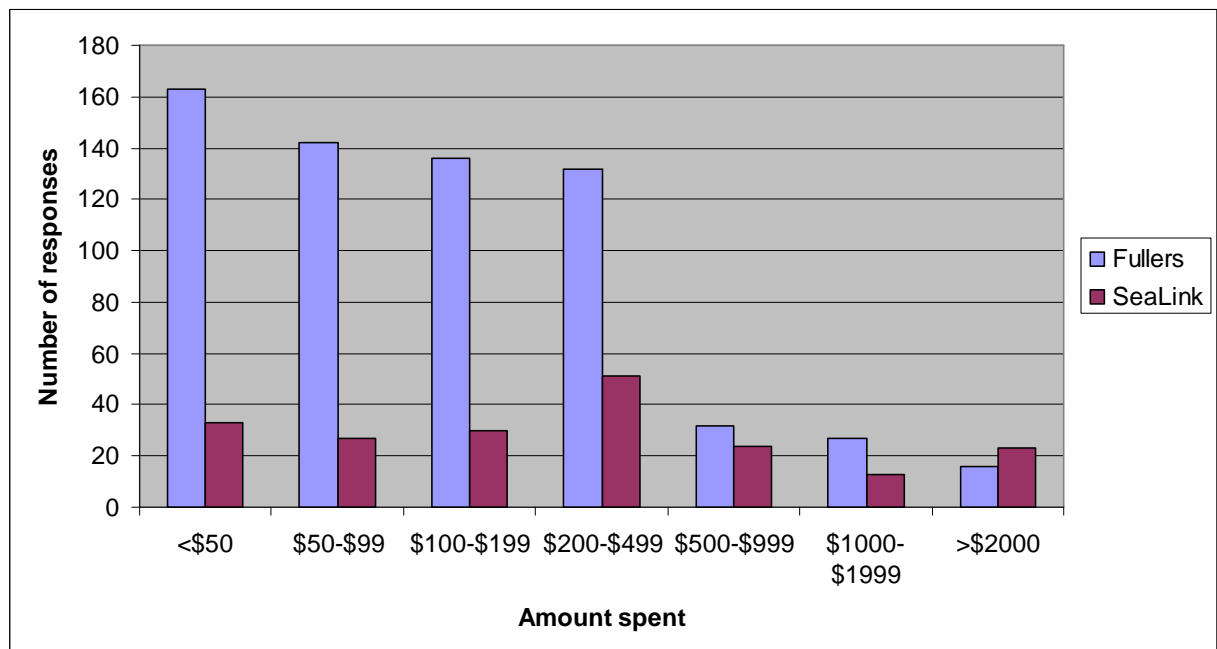
¹⁰ Stynes, D. J., White, E. M. (2006). *Reflections on Measuring Recreation and Travel Spending*. Journal of Travel Research, 45, 8 (pp. 8-16).

Figure 14: Party expenditure on this visit to Waiheke (including ferry tickets)



Of the nearly 650 parties travelling on Fullers who provided expenditure details, 25% spent less than \$50 (Figure 15), with another two thirds spending somewhere between \$50 and \$200 each. 75 parties spent more than \$500.

Figure 15: Expenditure per party by ferry company



Those on SeaLink were more likely to spend more. Three effects are apparent here: the added cost of transporting cars, the greater propensity of those with vehicles to take part in more activities, and smaller proportions of the lower spending SuperGold card-

holders and walkers travelling on SeaLink relative to Fullers. More than half the SeaLink parties spent over \$200, although those travelling without a vehicle were still able to spend less than \$50 or between \$50 and \$100.

If parties are spending less than \$100 with a return ferry ticket costing \$30 (SeaLink) or \$32 (Fullers), then little money is being spent on the island. Indeed, it is possible to spend less than \$50 per person if one packs a picnic (and 35% of parties took picnics) and/or travelling free on a SuperGold card. Half of all SuperGold parties spent less than \$50 and a further 36% spent between \$50 and \$200.

Interpreting these spending patterns, Waiheke is not a high-spend tourism destination for most. The high level of day trip activity to Waiheke and minimal use of serviced accommodation restricts expenditure relative to other tourism destinations. Nonetheless, an important minority spent more significant sums. One in ten parties, for example, spent more than \$1000 on their visit.

These patterns are consistent with those identified by Ryan and Aicken¹¹ (2003) in their earlier survey of Waiheke tourist expenditure. They found that the mean expenditure was \$200 per group of holidaymaker from a total of \$432,000. In our survey we recorded a total estimated expenditure of \$257,550 with a mean expenditure of \$315 per party for all parties of fewer than ten people. The more useful figure is the mean expenditure of \$288 per party for parties of five and under¹² (representing a mean expenditure of \$436 for SeaLink parties and \$246 for Fullers parties).

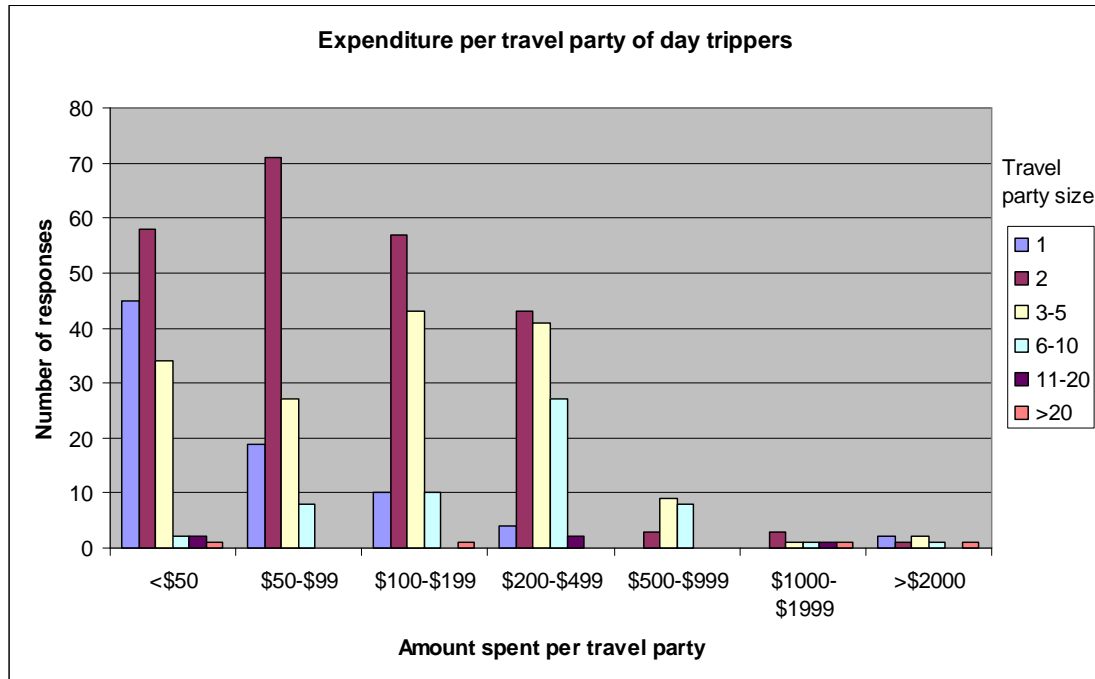
Expenditure levels are obviously influenced by the number of nights spent on Waiheke. The vast majority of travel parties in our survey were day trippers, with most travelling in groups of two and spending less than \$200 (Figure 16). Half of all day trip parties spent less than \$100. Only 33 parties spent more than \$500 on a day out to Waiheke. As

¹¹ Ryan, C. and Aicken, M. (2003), *Tourism on Waiheke Island: the views of residents and holidaymakers*. Tourism Auckland and Department of Tourism Management, The University of Waikato Management School, October 2003.

¹² Responses across the survey suggest that travel groups divide into two broad types – those more intimate groups of fewer than 10 people which ‘hang together’, and those larger groups such as Grey Power outings, tramping clubs, or wedding parties, which are more disparate. Among the former, the respondent was able to estimate total group expenditure, but the responses from respondents in larger groups revealed that they did not operate as collective spending entities. As a result we have excluded all parties of 10 or more from calculations of average party expenditure and per capita expenditure.

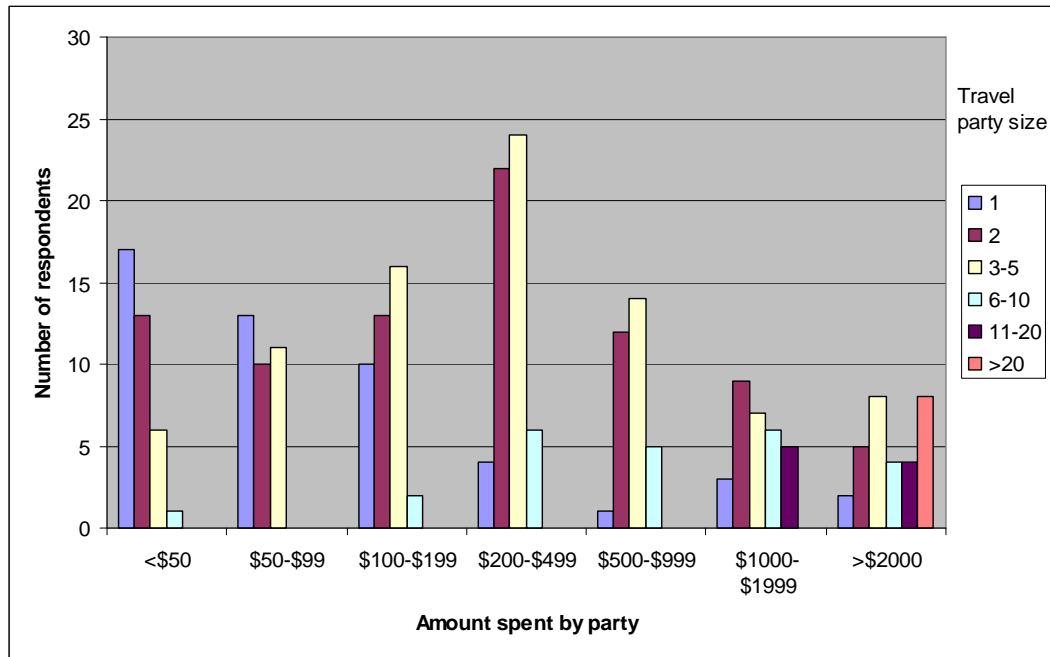
expected (discounting groups of picnickers and SuperGold travellers) smaller parties are more likely to have spent less and fewer parties and the number of parties recorded in each expenditure bracket fell away as expenditure increased – with these tendencies having some countervailing effects.

Figure 16: Amount spent by party size: day trippers



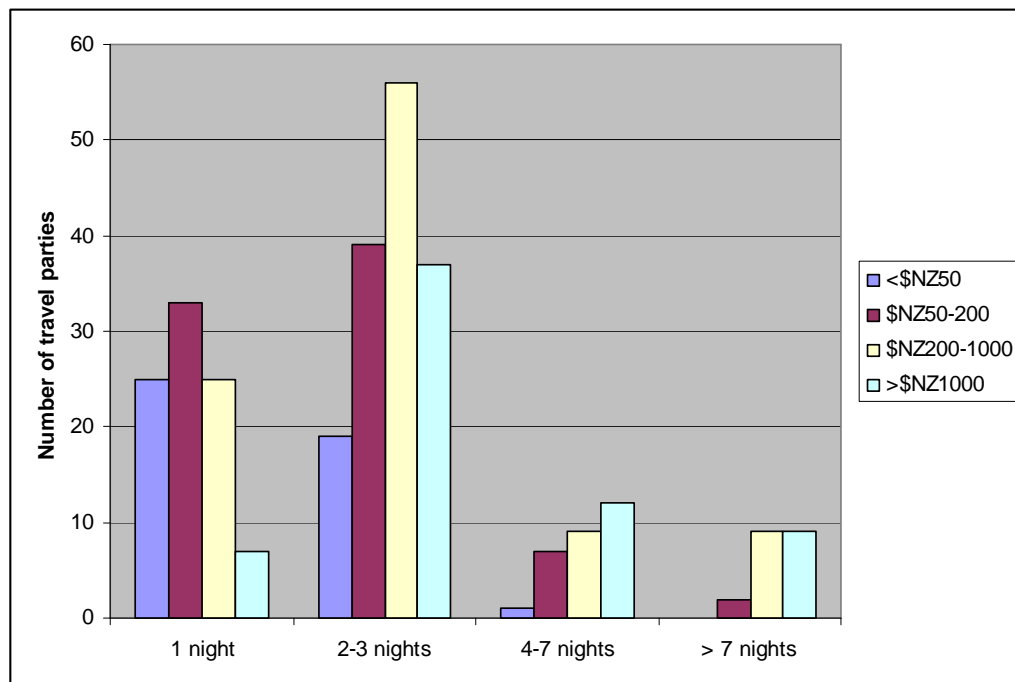
Yet only a quarter of those staying one or more nights spent less than \$100 (Figure 17). Those staying overnight were more likely to spend more heavily than other parties, with expenditure of between \$200 and \$500 the modal spend. Larger parties were more likely to stay overnight than take a day trip, relative to the sample as a whole. In all more than 30 parties staying overnight spent over \$2000.

Figure 17: Expenditure of parties staying one or more nights



Among parties which stayed overnight the vast majority spent three or fewer nights on the island, and spent less than \$1000 (Figure 18). It was most common for those who paid for their accommodation to stay for 2-3 nights (the typical weekend-break or short-term tourist common to any destination). This group of tourists are perhaps the target for a high-end tourism market on Waiheke, and do tend to spend more.

Figure 18: Length of stay compared with expenditure



Yet a significant number of parties were able to stay for between one and three nights and still spend less than \$100 (68) or even less than \$50 (37). Most of these stayed with friends and relatives, although a number stayed in their own baches and spent less than \$100 (8 less than \$50 and another 9 from \$50-\$99). Of the 76 parties staying overnight with friends, 24 spent less than \$50 and another 20 spent less than \$100.

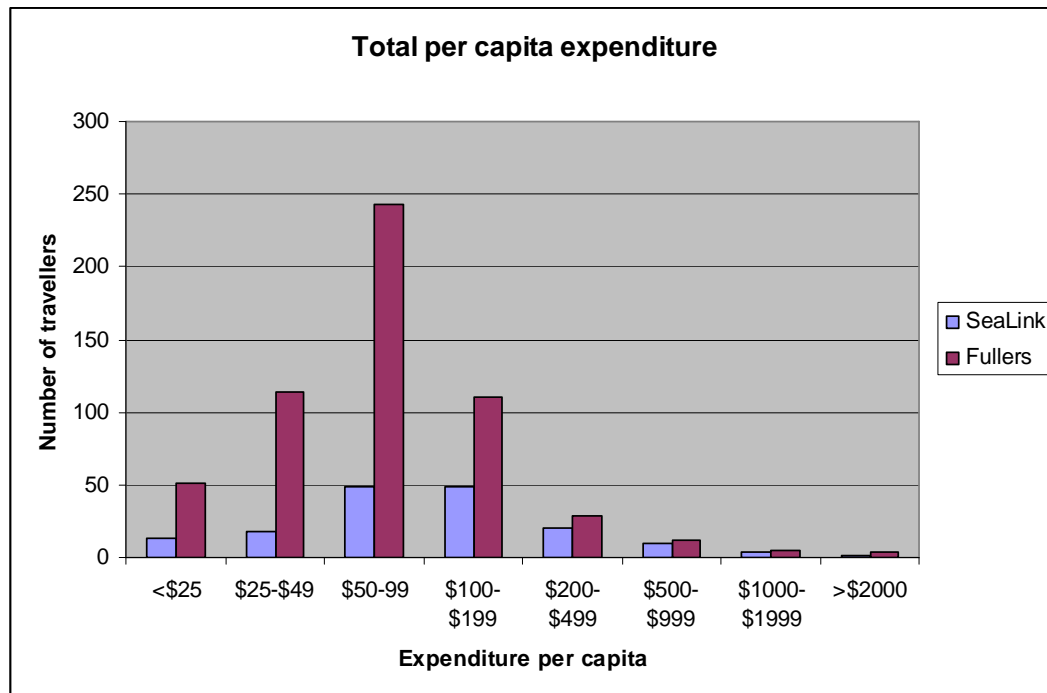
Of the 70 parties surveyed who stayed in their own holiday home, 20 claimed to have spent from \$100-200 on the particular visit to Waiheke, while 21 spent between \$200 and \$500. Less than one in five parties staying in their own accommodation, often for several days and commonly more than one week, spent over \$500 on their visit.

Average party spending can be converted to a per-person basis by dividing by the average party size. Once again we urge caution in the use of the calculated figures, although reassuringly the patterns we describe are consistent with the understandings of visitor behaviour detailed throughout this report and with the earlier survey of Ryan and Aicken (2003).

To convert group expenditure to per capita figures we made two further data manipulations. First, we excluded all parties of 10 or more to control for the respondent's lack of information about the party as a whole. Second, we converted expenditure recorded across bands to a single figure via three adjustments. For the top expenditure class of above \$2000, we have estimated expenditure at \$2000; for the bottom two expenditure classes we have taken the top of the range (rounded to \$50 and \$100 respectively); and for the other classes we have taken the mid-point of the band. This approach is conservative at the top end, keeping per capita expenditure in this group below mean expenditure levels. At the bottom end it allows for the effect of the ticket price of \$32 and for the smaller range of expenditure.

The results are recorded in Figure 19, which reconverts expenditure into classes (with the addition of the new class of less than \$25). The graph reveals a per capita distribution centred on the \$50-\$99 range for Fullers passengers and spread across \$50-\$200 for SeaLink passengers. The day-tripper and SuperGold effects are clearly evident in the per capita figures – especially in the 64 parties recording expenditure of under \$25 per capita.

Figure 19: Total per capita expenditure



Expected distributions register in Figure 20 and Figure 21, with 45% of day trip parties on Fullers spending between \$50 and \$99 per capita and two thirds of SeaLink day trip parties spending between \$50 and \$200. For travellers on both ferries, the distribution shifts into a higher expenditure category for those staying overnight. The number of family parties that travel to Waiheke for the day, spending little more than the cost of the ferry (including vehicle), registers in Figure 21.

Figure 20: Expenditure per capita for Fullers passengers

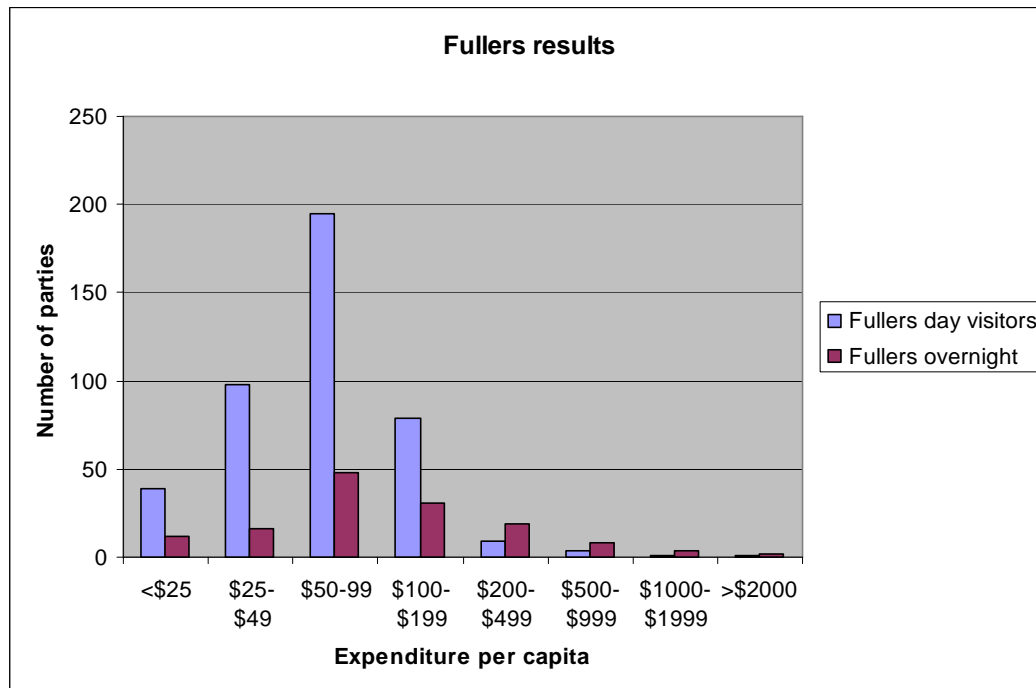
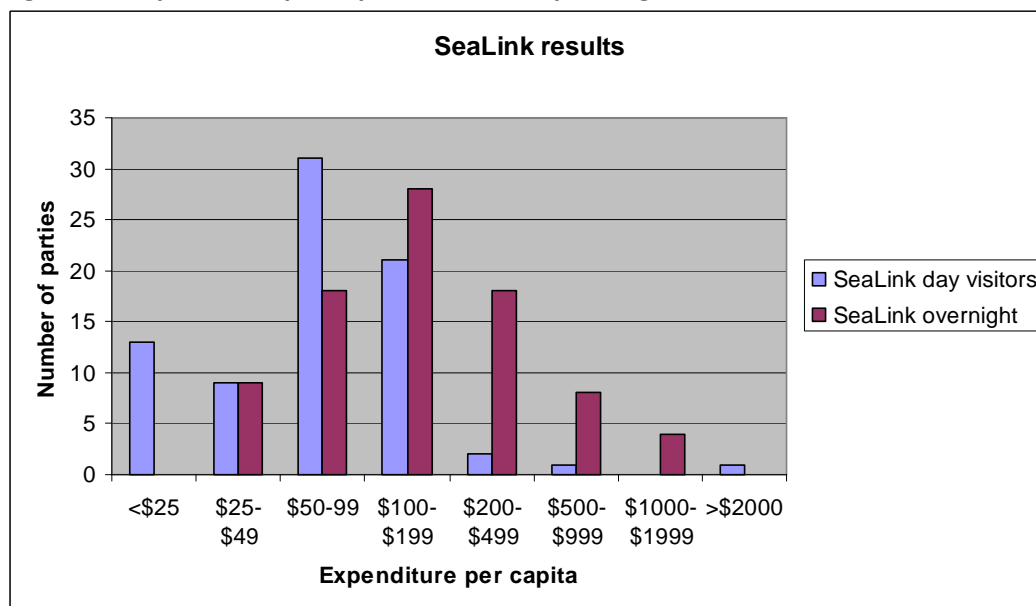
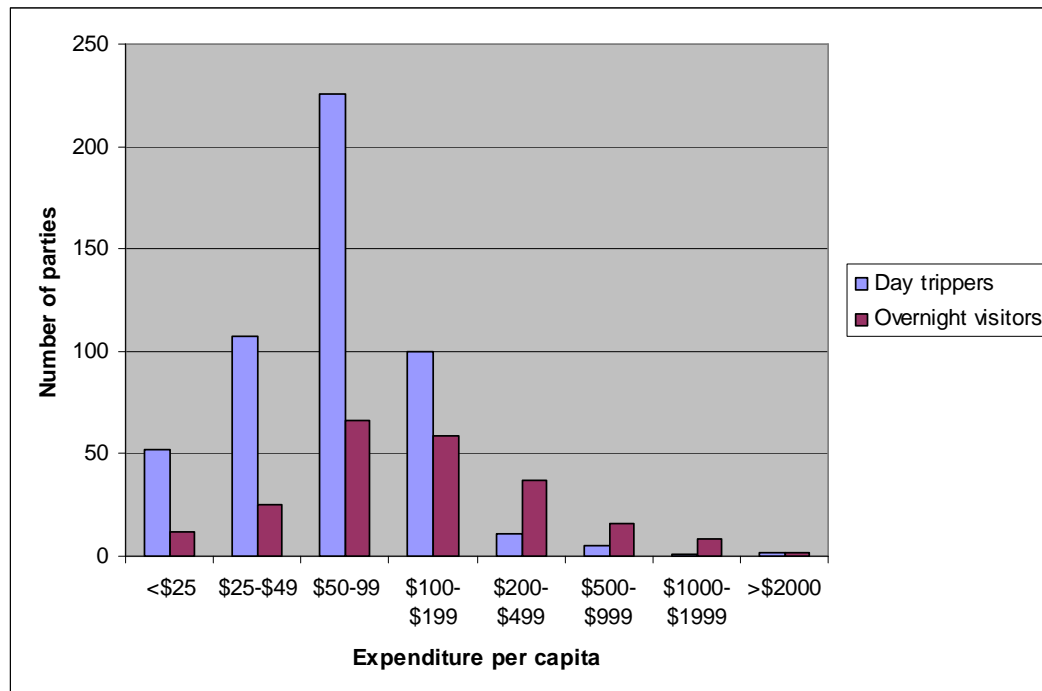


Figure 21: Expenditure per capita for SeaLink passengers



We found that the mean expenditure per capita of Fullers passengers was \$115 (Figure 20) and for SeaLink passengers \$182. Adjusting for overnight stays, the mean expenditure across the full sample for groups of fewer than 10 people was \$224 per capita for overnight visitors, compared with \$88 for day trippers (Figure 22).

Figure 22: Total expenditure per capita: day visitors by those staying overnight



7. Wine tourism

Visiting wineries

The fact that almost quarter of the respondent parties overall visited at least one winery demonstrates the popularity of the wine industry on Waiheke. Of those who answered the specific questions on wine (857 parties), 31% visited a winery. Among those who visited a winery, almost two thirds visited only one (61%). 18% visited two, 13% visited three, and only 8% visited four or more.

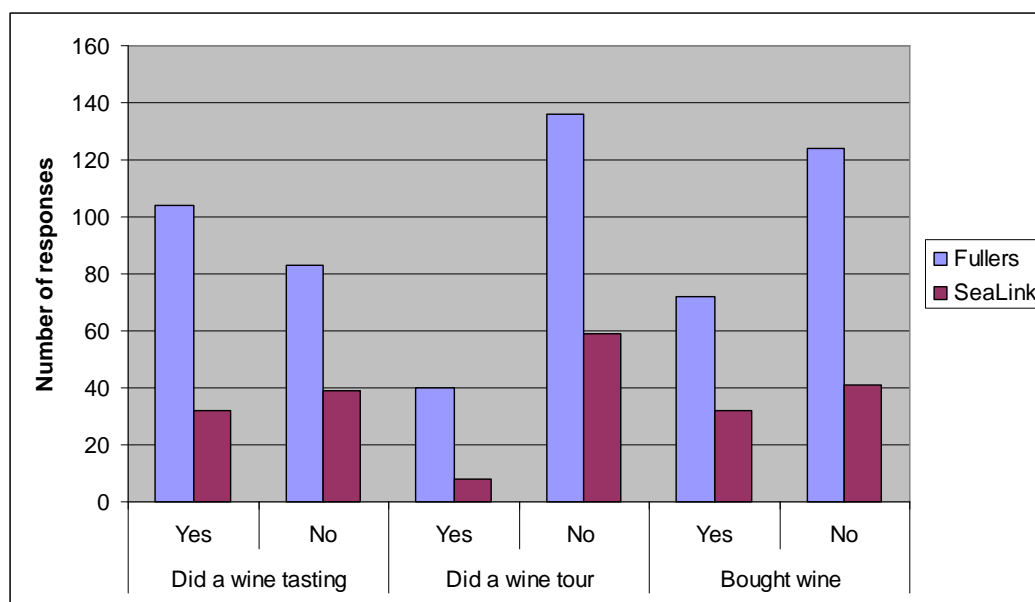
Comparing the ferry companies, of the 657 Fullers respondents who answered the question, 29% (189) visited a winery. Of the 200 SeaLink respondents who answered the question, 38% (75) visited a winery. This again registers the greater mobility of visitors with access to a car (Table 9). Foot travellers rely on walking, buses, taxis, shuttles, incurring effort or expense and restricting the mobility of those on a budget. The greater number of Fullers visitors visiting three wineries reflects the number signed up to winery tours operating from Matiatia.

Table 9: Number of wineries visited comparing ferry companies

Number of wineries	Fullers		SeaLink	
	Count	Percentage	Count	Percentage
One	108	64%	37	53%
Two	26	16%	17	24%
Three	23	14%	7	10%
Four	6	4%	7	10%
Five	2	1%	2	3%
Six	0	0%	0	0%
Seven or more	1	1%	0	0%

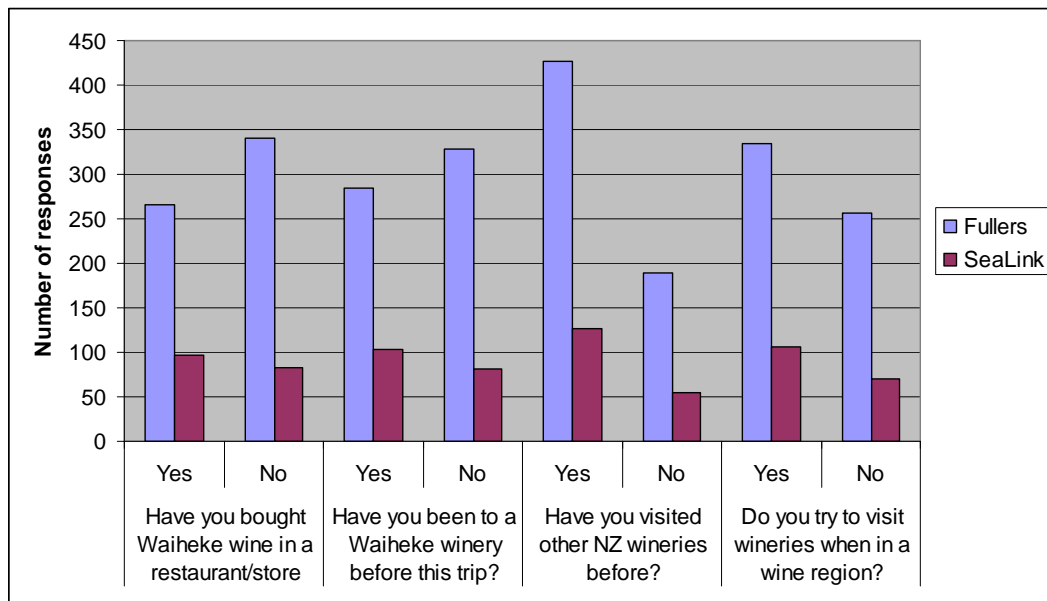
Among the winery visitors, wine tasting was the most popular activity, followed by buying Waiheke wine, while a smaller proportion of respondents did a wine tour (Figure 23).

Figure 23: Wine activities



The questionnaire included general questions relating to wine-buying behaviour, regardless of whether people had visited a Waiheke winery on the particular trip (Figure 24). Of the 786 respondents who answered (606 of Fullers parties and 180 SeaLink), 46% had previously purchased Waiheke wine; 43% had previously visited a Waiheke winery; 70% had previously visited other New Zealand wineries; and 57% generally try to visit wineries when in a wine region.

Figure 24: Winery behaviour independent of this visit to Waiheke



Read in these terms, wine plays a dominant role in Waiheke tourism. A majority of visitors to Waiheke could be classed as ‘wine tourists’¹³. This figure clearly reflects the extent to which Waiheke is promoted as a wine tourism destination, the fact that its top restaurants are also wineries, and the dominance of wine-tourism among the range of activities available on Waiheke (both sides of the ‘Island of Wine’ effect). Adopting the more restrictive classification of wine tourists as those who visit *more than one winery* in a region, 39% of respondents still register as wine tourists.

In the section (analysed below) in which respondents were asked whether there was anything they would have liked to have done but didn’t or couldn’t, of 381 parties, 81 (18%) indicated that they would have liked to visit a winery on Waiheke but ran out of time. This comprises 7% of the entire sample. These numbers, combined with those who visit only one winery yet reveal an interest in wine, suggests significant potential for wine tourism on Waiheke. Also, given the large number of repeat visitors, this suggests that having visited Waiheke, people become more aware of the possibilities offered by island’s wine industry.

¹³ Wine tourists are defined by the Ministry of Tourism as international and domestic visitors, aged 15 years and over, who visit a winery at least once while travelling in New Zealand (<http://www.tourismresearch.govt.nz/Documents/Tourism%20Sector%20Profiles/WineTourism%2008-2007.pdf>).

Waiheke Wine Festival

Over Waitangi weekend, the Waiheke Wine Festival was held at Isola Estate in the Onetangi Valley in the middle of the island. When it first began, the Festival was celebrated by each of the participating wineries at their own premises, with buses transporting Festival-goers between properties. Logistics became difficult as the Festival grew in popularity. Five years ago the Festival was centralised to a single site.

The Festival is distinguished in a crowded summer events calendar by Waiheke's distinctive 'islandness' appeal: the ferry ride (which in 2009 provided a stunning start to a magnificent summer day), the bus from the wharf to the site in the middle of the island (which oddly for an island festival has no view of the sea), the openness of the site, and the mix of images of Waiheke's different communities (dreadlocks mixed with the smart casual summer wear of those enjoying restricted entry to the Platinum Visa or Bollinger tents).

Many of the island's wineries were represented, offering tastings (\$2-\$5), glasses of wine or bottles for sale, among other merchandise. The entry fee was \$65. The entry fee included a programme of events, the music, and a wine glass, but no wine tasting. A variety of food was available for sale. Music was provided with a wide appeal (Nathan Haines and his band among others).

We administered a modified questionnaire on three ferries returning to Auckland to try to capture some of the effect of the festival, which took place on the Saturday from 11am until 7pm. The surveyors interviewed on the 6pm Saturday ferry and two ferries on the Sunday. Despite the reported numbers attending the festival (reputed to be 2,000 or so), only 25 parties of the 221 survey questionnaires administered on Fullers ferries on both days reported that they had attended the Festival (15 surveyed on the Saturday, and 10 on the Sunday). None of the Sealink parties surveyed attended the Festival.

Those that attended the Festival were then asked to rate their experience. 16 of the 25 parties who responded were unhappy with the 'value for money' represented by the Wine Festival (Table 10). Only 8 of the 25 parties reported that they had been happy

with the experience, and few felt very happy with any dimension of the experience. Only 3 parties said that they would definitely return to the Waiheke Wine Festival.

Table 10: Wine festival experience

	Very unhappy	Unhappy	Neutral	Happy	Very happy
Value for money	8	8	6	3	3
Quality of food	3	3	9	8	2
Selection of wines	1	3	5	9	6
General satisfaction	3	3	11	5	3

These results must be interpreted with care. Large numbers visited Waiheke on those days¹⁴, and event organisers claim that 2,250 people attended it. Our response rate was thus disappointing¹⁵. The low response rate might reflect the timing of surveys. The Festival finished at 7pm, so a later ferry may have returned a higher proportion of Festival-goers. We also failed to catch any Festival-goers who may have spent the night on Waiheke. Alternatively, our observations at Matiatia waiting for the ferry suggest that many of the Festival-goers may have been too drunk to respond, or too taken with the magnificence of the evening trip back to Auckland. It is also possible that our sample is biased towards those who did not enjoy the festival – those who enjoyed it most were likely to have remained at the Festival until 7pm or less able/likely to complete a survey.

One third of Festival-goers who commented on the questionnaires indicated that the \$65 cost to visit the Wine Festival was excessive. Some commented specifically that it did not include a wine tasting. Researchers at the site observed that some Festival-goers who had taken the risk of pre-paying were irritated by the fact that people were paying on entry despite advance advertising warning that no gate sales would be available. Other sources of dissatisfaction were the lack of shade and the prohibition on bringing water bottles into the grounds, and the payment.

Respondents in general over the weekend were asked to comment on whether the Waiheke Wine Festival was likely to encourage them to visit a local winery or buy Waiheke wine. More than half suggested that this was unlikely, with a large number of these (one third of all respondents) claiming that it was highly unlikely. In the view of

¹⁴ The 6pm Saturday and 4pm Sunday ferries on which we surveyed were extremely full.

¹⁵ Festival organiser Kathy Cunningham, quoted in Waiheke Marketplace, 11 February 2009.

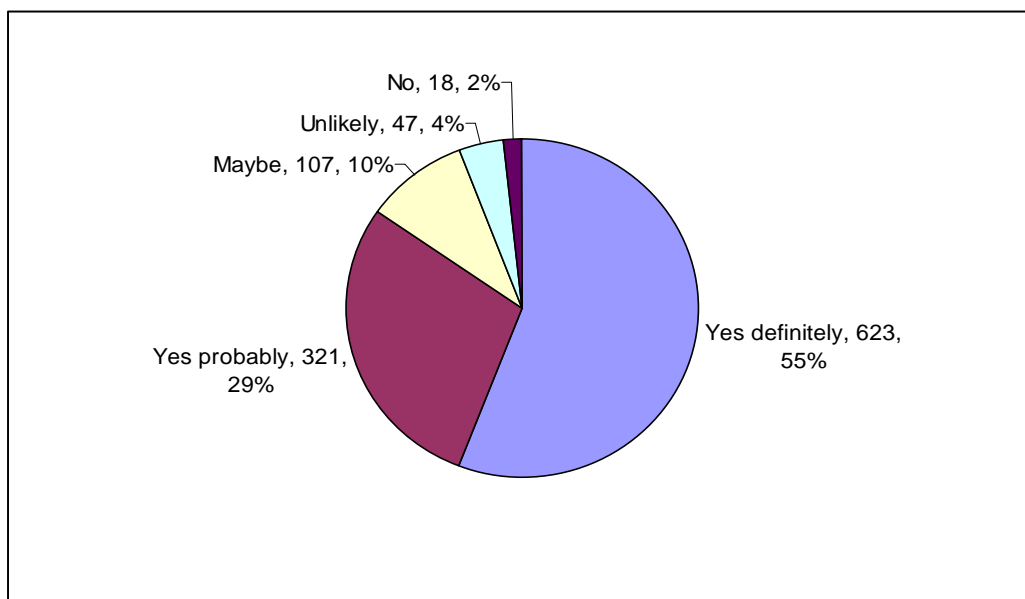
these respondents, the Festival appears to be more an entertainment than a specifically wine-related event.

Despite the low response rate, it is safe to conclude that the Waiheke Wine Festival emerges poorly from the surveys. This is grounds for concern given that it is imagined to be a 'combined front' for the Waiheke wineries.

8. Rating the Waiheke experience

The overriding impression of Waiheke as a destination for visitors is vastly favourable. Visiting parties (excluding Waiheke residents) were asked whether they would return to Waiheke. Over half (55%) answered 'yes definitely', while 29% suggested that they would 'probably' visit again (Figure 25). Of the small number who said 'no', several commented that this is because their Waiheke visit was part of a once in a lifetime trip to New Zealand.

Figure 25: Likelihood of returning to Waiheke

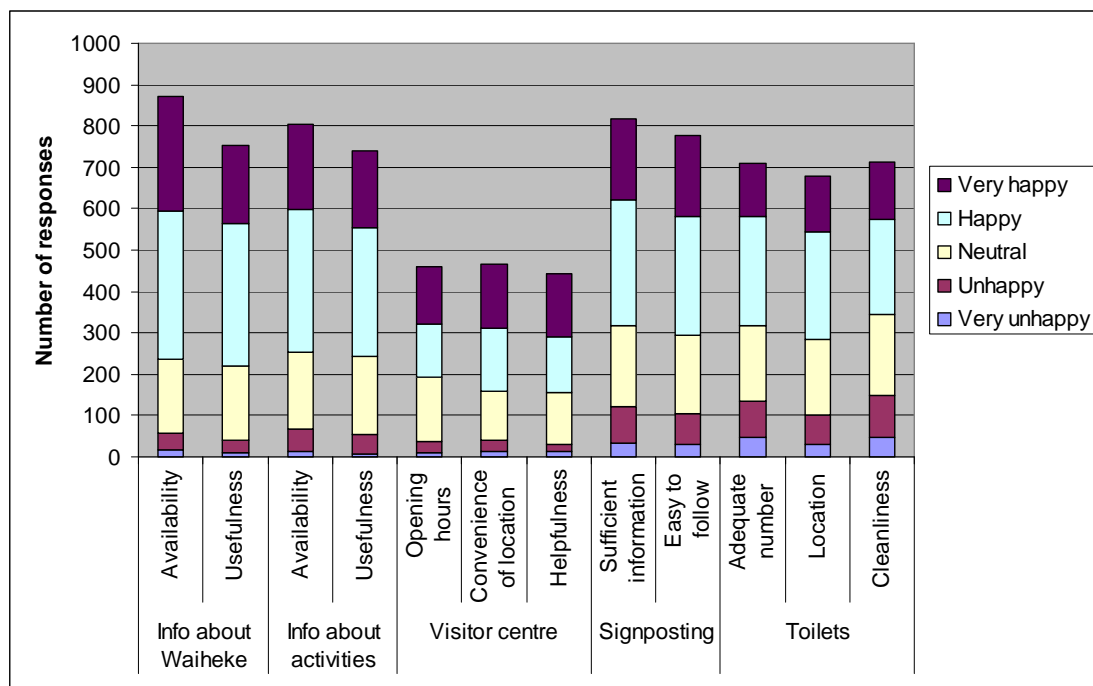


Respondents were asked the follow up question of whether they would recommend Waiheke as a destination for friends or family. 873 out of the 900 respondents who answered the question said that they would.

Respondents were also asked to rank their experience of a variety of different public services on Waiheke, along a spectrum from 1 (unhappy) to 3 (neither happy nor unhappy) to 5 (very happy). Those who indicated that they were Waiheke residents were also invited to answer this question.

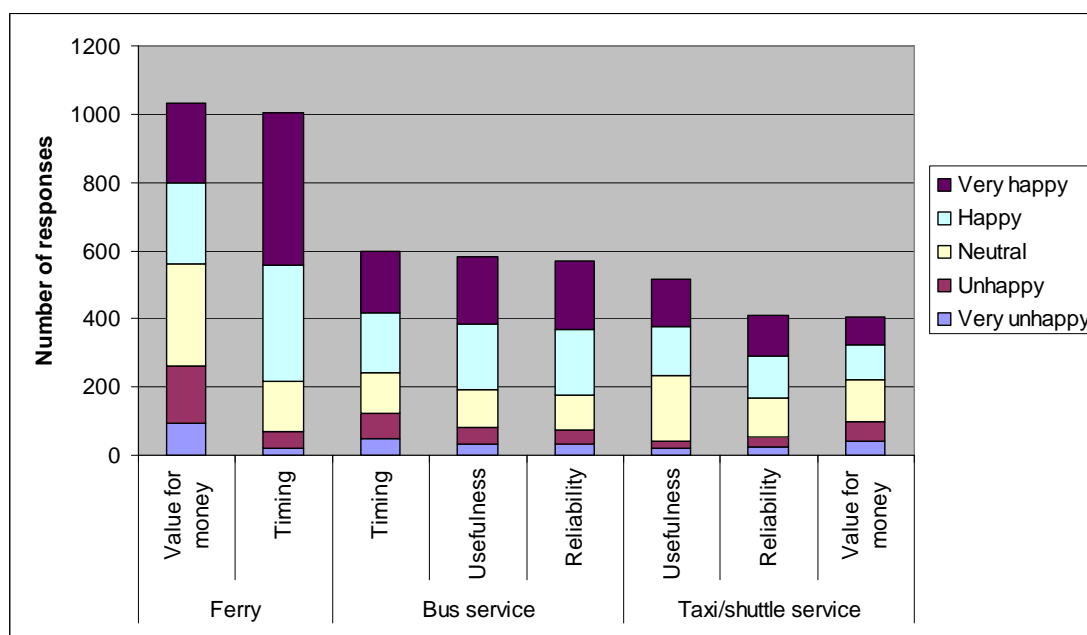
Most parties were more than satisfied with most services on the island (Figure 26). There was some dissatisfaction expressed with signposting, while one in six parties claimed there to be insufficient toilet facilities. A number of walkers suggested that information and signage suddenly ceased, leaving them uncertain of where to go next. Others added that that the provision of information at the ferry terminal could be improved, especially in terms of walking tracks. The lack of road names on the tourist maps was also mentioned as a source of irritation.

Figure 26: Experience of services on Waiheke



Whilst most were also satisfied with their experience of transport on the island, 25% of respondents questioned the value for money of the ferries, and 15% expressed some dissatisfaction with both the timing of bus services and the cost of taxis/shuttles (Figure 27).

Figure 27: Satisfaction with travel experience



In the general comments section, 315 distinct negative comments were received from 143 respondent parties about various aspects of the visit to Waiheke (Table 11). Of those offering negative comments, 86 were visitors to Waiheke.

Table 11: Negative comments

Comment	Number (n=315)	% of comments
Ferry expensive/overcrowded/dirty	71	23%
Buses insufficient/overcrowded	54	17%
Weather bad/insufficient wet weather activities	28	9%
Expensive (overall)	28	9%
Service poor	20	6%
Taxis expensive/insufficient	17	5%
Signage insufficient	16	5%
Infrastructure including walkways/cycleways/roads	14	3%
Toilets insufficient/dirty	13	4%
Information insufficient	13	4%
Wine festival poor value	9	3%
Inadequate shade	7	2%
Rubbish/no holding tanks	6	2%
No icecream available	6	2%
Car hire expensive/poor quality	5	2%
Too many tourists	4	1%
Headland exhibition: insufficient transport	4	1%

Almost a quarter of negative comments were directed at aspects of the ferry service. The most common complaint was the cost of the ticket (for both ferry companies).

Respondents on the Fullers ferries also expressed some frustrations to do with oversubscription, full ferries, and confusion on the wharves on busy days¹⁶.

This demonstrates the problem that Fullers encounters with the extremely variable, highly seasonal demand fluctuations. The 'lack of crowd control' in the ferry queue and confusion around where to board were emphasised repeatedly as a problem, particularly at Matiatia. Some also complained that the ferries were dirty.

The bus service was also criticised, particularly on the busy holiday weekend days, with 17% of respondents claimed that buses were too full, departed Matiatia too quickly, and/or were too infrequent¹⁷. Several people suggested the need for smaller 'feeder' services between different destinations, running more frequently (such as Oneroa to Ostend or to the supermarket).

Both sets of comments reinforce the difficulties confronting transport operators during the peak summer season as a result of the huge influx of visitors. Interviews with both ferry operators reinforce that the companies are fully aware of the difficulties and try to plan accordingly.

The absence of 'reasonably priced' food was a common complaint. So too was the lack of wet-weather activities available on Waiheke, particularly for children. An issue for most tourism destinations, absence of wet-weather options is particularly apparent on Waiheke and limits people's enjoyment.

There was also a clear correlation between the weather and people's enjoyment of the ferry ride. While beautiful weather prevailed during the survey period, surveys conducted on the few rainy, cold days were more likely to generate negative impressions about Waiheke as people reflected on their day on the ferry trip home. Of the 17 Fullers surveys, only one was conducted on an extremely wet and cold day. Noticeably more negative responses were recorded in the comments section on this sailing than on fine days, particularly with respect to the lack of wet-weather activities.

¹⁶ For example, on the day of the Waiheke Wharf-to-Wharf fun run, the 10am ferry was oversubscribed (at 860 passengers), requiring some passengers to wait for the 11am ferry and annoying many.

¹⁷ Buses leave within minutes of the ferry's arrival, which can be too soon for tourists uncertain of where they want to go next.

Three of the SeaLink surveys were conducted on rainy days, and again respondents were more likely to comment negatively about their visit.

Despite these complaints, 268 positive comments were also registered. 43% reported a very positive overall experience. 17% specifically mentioned the beauty of Waiheke and 11% highlighted the friendliness of locals. The Headland sculpture exhibition in particular appears to have been a great success (Table 13).

Table 12: Positive comments

Comment	Number (n=268)	% of comments
Overall positive experience	115	43%
Beautiful	45	17%
Friendly locals	30	11%
Sculpture exhibition good	23	9%
Transport good	11	4%
Wineries/wine good	11	4%
Service/food good	10	4%
Walking tracks good	9	3%
Paradise	6	2%
Beach races good	5	2%
Clean	3	1%

9. Summary

The survey provides a snapshot of Waiheke tourism during the peak domestic summer season. This is necessarily a partial account of tourism on Waiheke as many of the interesting questions relate to visit patterns in different seasons. Similar surveys need to be done during different tourism seasons to build a more comprehensive picture of year-round tourism patterns on Waiheke.

The survey results help to quantify some of the well-known characteristics of Waiheke visitors and their activities over the summer period. The key attractions of Waiheke for visitors are threefold: as a holiday destination (beaches, baches); because of its natural features (scenery, walking tracks); and because of its cultural attractions (wine, art, history). These are commonly combined in a single visit to Waiheke, which is often a day trip.

The vast majority of visitors come during summertime. The high degree of seasonality in the Waiheke visitor pattern creates issues, as it does in most tourism destinations. For

the ferry companies, demand oscillates wildly from summer holiday weekends where ferries confront excess demand, to winter sailings with few passengers. This has multiple consequences for management, with summertime visitors experiencing overloaded buses, a shortage of taxis, difficulty in securing a reservation at restaurants or on tour parties, pressure on toilet facilities and a range of other effects. Meanwhile, tourism businesses must take account of the winter months with drastically reduced numbers of customers.

For wine tourism operators, the seasonal tourism demand has significant consequences balancing costs of opening restaurants, cellar doors or wine tours. Most enterprises restrict hours of operations, with implications for rewarding and retaining staff. Many restaurants and wineries either restrict their opening hours dramatically from Easter onwards, or close entirely across these months.

Weather features prominently in the Waiheke experience. On cold, rainy days, respondents were overwhelmingly more likely to complain about their visit to Waiheke. The ferry ride can affect perceptions positively or negatively depending on the weather, and there are certainly far fewer wet weather activities available than there are summertime activities. The results suggest that there may be potential to create a better tourism value proposition that addresses both off-peak and marginal weather periods, to the benefit of tourism on Waiheke and in the wider Auckland region.

Visitors come to Waiheke for many different reasons, and often for a mixture of reasons. A trip to Waiheke tends to be planned in advance. Visitors base their planning on Waiheke's reputation as a destination, and websites are an important source of information. The fact that people plan in advance means that it is possible to communicate with potential visitors, and in turn to address issues of seasonality through clever marketing and/or new product development such as 'grab-a-seat deals' or off-season packages.

Waiheke has a loyal following: repeat visitors from Auckland comprise the majority of visitors to Waiheke over the summer. 80% of the respondents are New Zealand residents, and of them, 80% live in Auckland. The number of repeat visitors is extremely high: three quarters of respondents had visited Waiheke before, and 92% of

Aucklanders surveyed had been previously. Non-Aucklanders were split almost 50:50 in terms of whether they had previously visited Waiheke. There were surprisingly few non-Aucklanders among the domestic tourists. Among the international residents visiting Waiheke, most live in the UK, Australia, Europe and the North America.

The proximity of Waiheke to Auckland makes it an ideal destination for a day trip: two thirds of respondents were day trippers. The high proportion of day trippers coupled with the fact that most overnight visitors stay with friends or relatives, or in their own home, means that expenditure is lower than might be expected. Only one third of those who stayed overnight paid for their accommodation. Our figures suggest that the mean per capita expenditure for groups of fewer than 10 people was \$224 for those staying overnight on Waiheke, compared with \$88 for day trippers. Buses are by far the most dominant form of transport used by visitors, followed by walking.

Expenditure is related to the size of travel party and the length of stay. 40% of respondents travelled in groups of two (30% with their spouse or partner). 87% of respondents were in groups of five or fewer, showing the popularity of Waiheke as a family or small group destination.

The budget traveller remains important to Waiheke tourism, with a number taking picnics and a further group seeking cheaper eating options. Visitors who dined at restaurants were mainly satisfied with their experience and those eating at wineries were mostly happy.

The SuperGold travel subsidy has been an important factor in attracting a group of travellers who might not have otherwise chosen to visit Waiheke. Whilst half of the 65 and over age group spent less than \$50 (and indeed, observation suggests that many spend nothing at all, choosing instead to take a thermos and sandwiches), 50% spent at least \$50 and many spent more. This demonstrates an important market niche that

tourism businesses could aim to target, although there is no guarantee that the subsidy will survive government interest in its cost and the subsidy paid to ferry companies¹⁸.

Wine tourism is a key tourist attraction on Waiheke, although not often cited as the primary reason why visitors choose to visit. Waiheke's leading restaurants are wineries and many visiting parties combined their winery visit with a meal. The wineries also feature prominently in the set of distinctively Waiheke activities that might be enjoyed on the island. Thus although only 6% of visitors cited 'visiting a vineyard' as their main reason for going to Waiheke, 25% visited a winery (many to enjoy lunch in a winery restaurant) and a further 7% would have liked to visit a winery but ran out of time. Of those parties who visited wineries, two thirds visited just one winery and revealed through their activities that they are attracted at least in part by the allure of the vineyard, winery, and wine tasting. One third or 7.5% of the total number of visitors to Waiheke visited more than one winery, qualifying them distinctively as serious wine tourists. Wine tourism is thus a substantial part of the Waiheke product, with the wineries luring people to Waiheke, adding lustre to the day out, and providing a focal point for the visit. They give Waiheke an important edge in Auckland's day out summer tourism market, as well as attracting a small specialist market of dedicated wine tourists.

Special events play an important role in attracting visitors to Waiheke. The Headland sculpture walk (previously Sculpture on the Gulf) was visited by a substantial proportion of day trippers, and was highly commended. Organisers estimated that over 25,000 visitors attended the three-week exhibition¹⁹. Weddings, parties and anniversaries also contribute to the attraction of Waiheke. A further special event is the Waiheke Wine Festival, held in Waitangi weekend. Targeted surveys administered during that weekend to try to capture the essence resulted in an overall negative impression, mainly relating to the cost of the ticket.

¹⁸ According to media reports based on data obtained under an Official Information Act request (ARTA official, pers. Comm.), an average of just over 200 pensioners a day visited Waiheke in the five months to February 28 2009 (Dearnaley, 2009). In the five months to 28 February 2009, Fullers earned \$756,429 in central government subsidies and \$11,000 from the Auckland Regional Council. The subsidy paid to the ferry companies accounted for almost a quarter of the Government's contribution to off-peak public transport travel in the Auckland region.

¹⁹ <http://www.waihekegulfnews.co.nz/other-news/headland-added-summer-bonus.html>

Visitors' perceptions of Waiheke were overwhelmingly positive. Any negative comments were generally directed at the challenges associated with transport. The cost of the ferries, and overcrowding on ferries and buses evident on hot summer days, were both frequently cited as problems. The ferry companies attempt to strike a balance between cost and a comprehensiveness of service on the one hand, and satisfying the needs of visitors and Waiheke residents on the other. A happy medium is hard to achieve.

The significant interdependence between transport providers and local businesses on Waiheke suggests that cohesiveness and cooperation are critical to a successful tourism experience. Indeed, interdependence is a feature of island life, such that collaboration more generally among stakeholders seems to be a necessary platform for developing responses to many of the issues.

Overall, parties surveyed provided glowing reviews of their Waiheke excursion. In particular, the natural beauty of the island, such its beaches, the friendliness of locals, and the high quality of the dining experience were notable features in the comments elicited. As two respondents put it,

"It's hard to improve paradise"

"It was superb in every way"

Reinforcing the point, 85% stated that they would visit again, and 97% would recommend Waiheke as a destination to their friends and family. It therefore seems likely that the influx of summertime visitors will continue, and that tourism operators will continue to confront dramatic oscillations in seasonal demand.

10. Implications

Five key issues stand out from the survey research.

- Waiheke is an immensely popular destination among visitors
- Waiheke is predominantly a summertime destination
- Waiheke tourism relies heavily on repeat business from Auckland residents
- The appeal of Waiheke relates to a combination of natural and cultural attractions
- There are a number of significant over-capacity constraints in summer

The immense popularity of Waiheke among domestic travellers, its proximity to Auckland, and the high numbers of repeat visitors suggest that the pressures on the island's infrastructure from peak summer demand are likely to increase. The capacity issues already signalled in the negative comments of visitors are a significant concern, which must be addressed to sustain the reputation on which Waiheke tourism depends. Moreover, resolving these problems is essential if tourism on Waiheke is to develop sustainably (environmentally, socially and culturally).

At the same time, in talking to tourism operators, there are significant issues of under-utilisation of capacity in the off-season, which the survey results do not reveal. Addressing infrastructure requirements will require significant collaboration between stakeholders.

Universal problems of seasonality in tourism are exacerbated by transport issues specific to Waiheke. These occur both in terms of travel to the island and transport once on the island. Access to the island is by ferry, which is Waiheke's point of difference and an attraction in its own right, especially on a sunny day. However, because Waiheke is not on the way to anywhere people must travel there specifically, which means that there is no through traffic to target in the off-season. This can reinforce Waiheke's weather dependence, whilst the ferry ride can lose its appeal in bad weather.

Addressing the challenges of seasonality is a priority for all tourism operators. There are pressures for innovative initiatives to expand the tourist value proposition to all-season activities. The ferry companies, for example, now both actively promote winter visits to Waiheke through a range of mechanisms. Promotional efforts may seek to increase off-season tourism, perhaps working with tourism agencies and accommodation providers to produce a winter package that addresses the issue of wet weather activities (even positioning wine as a leader in that regard).

However, simply increasing the number of visitors is problematic. Not all stakeholders are keen to see tourism increased or its season extended. There is some opposition within the community to extended tourism, particularly in summer months where capacity issues impact on the daily lives of residents.


The survey reveals that visits to Waiheke tend to be planned. Whilst reassuring that visitors to Waiheke do plan their trips, this emphasises the significance of lines of communication between Waiheke's tourism enterprises and their markets. It also emphasises the opportunity to influence potential visitors, especially through web-based promotional material that reinforces Waiheke's reputation and communicates specific offers to tempt new and repeat business alike.

The survey demonstrates the central importance of wine tourism to Waiheke's appeal. Each of the findings above is significant for wine tourism: seasonality, the type of visitor attracted to Waiheke, their activity and expenditure patterns, how Waiheke is perceived by visitors, and issues of transportation, weather dependence, and seasonality.

For many summer visitors Waiheke is indeed the 'Island of Wine'. However, if Waiheke is to honour its advertised reputation and develop further as a wine tourism destination, then it needs to sustain a reliable and quality wine tourism presence year-round – for both existing levels of traffic and potentially new visitor flows. Monitoring the extent and impacts on this brand of capacity constraints at peak season and failures to deliver in the off-season is a priority, as is responding in creative ways and being seen to do so.

Further debates over tourism on Waiheke needs to be informed by further information. In particular, further survey work conducted in different tourism seasons is required, as is ongoing monitoring to capture what is a changing tourism landscape. Further strategic work is required to overcome some of the challenges relating to seasonality and to encourage the development of sustainable tourism of Waiheke that meets the different interests of the different groups involved.

Appendix

 THE UNIVERSITY OF AUCKLAND NEW ZEALAND Te Whare Wānanga o Tāmaki Makaurau	<h3>Waiheke Island Survey</h3>	SCHOOL OF GEOGRAPHY, GEOLOGY AND ENVIRONMENTAL SCIENCE
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The University of Auckland is trying to find out who uses the ferry service to Waiheke Island, and what visitors do when they visit. It would be very helpful if you could answer the following questions.

The survey is in 3 parts: the first is about your visit to Waiheke, the second is about the services on the Island, and the third section asks for a few details about you.

The survey should take about 10-15 minutes to complete.

Please tick the relevant boxes next to your answers

SECTION 1: YOUR VISIT TODAY

1. Do you live on Waiheke Island?

Yes I live there now No I have never lived there I used to live there

If you answered yes, could you please go to sections 2 and 3

2. If you were just visiting Waiheke, did you visit:

For the day Overnight

3. If you stayed overnight, how many nights did you stay?

1 2-3 4-7 More than 7

4. If staying overnight, did you stay **(Please tick as many as appropriate):**

In your own holiday home Camping

At a B&B At a hotel/motel/lodge

Renting a private house Staying with family/friends

Other (please specify): _____

5. Was this your first visit to Waiheke?

Yes No

If yes, go to question 8.

6. If you have visited Waiheke before today, have you visited:

Once before Once during the last year

More than once during the last year (how would you best describe):

2 times 20- 25 times (approx twice a month)

3-6 times Most weekends

7-12 times (approx once a month) Daily/weekdays

Other (please state): _____

7. If you have been to Waiheke before today, are there any particular times of the year that you usually come to Waiheke (**Please tick as many as appropriate**):

Christmas/New Year Easter

Summer Winter

Special events (e.g. festivals) School holidays

Every week Public Holiday

Any time

Other (please specify): _____

8. What was your **main reason** for visiting Waiheke this trip? (**Please choose only one**)

Business/work Visit wineries

Beaches Recommendation

Walking Visiting friends/relatives

Restaurant/café visit Never been before

Holiday To attend a special event

Other (please specify): _____

9. Where did you get the information about Waiheke to plan this trip? (**Please tick as many as appropriate**)

Previous visits Magazine Newspaper

Visitor info centre Television Brochures/pamphlets

Radio Internet Recommendation

Other (please specify): _____

10. How long ago did you decide you were going to make this trip?

This morning Within the last week More than a week ago

11. Who are you travelling with on this trip?

- | | | | |
|--------------|--------------------------|-----------------|--------------------------|
| Alone | <input type="checkbox"/> | Partner/Spouse | <input type="checkbox"/> |
| Friend/s | <input type="checkbox"/> | Family | <input type="checkbox"/> |
| Tour group | <input type="checkbox"/> | Work colleagues | <input type="checkbox"/> |
| Group outing | <input type="checkbox"/> | | |

Other (please specify): _____

12. If you are travelling with others, how many people are in your travel party (**including yourself**)? _____

13. Did you travel free on a Super GoldCard today? Yes No

14. Did you know what you were going to do when you stepped off the ferry (i.e. did you have a set plan for the trip)? Yes No

15. **If you answered No to Question 14**, what did you do first? (Please specify):

16. **If you answered No to Question 14**, where did you get the information to plan your day? (**Please tick as many as appropriate**)

- | | |
|--|--------------------------|
| Ferry terminal information stand (on Waiheke) | <input type="checkbox"/> |
| Information booth on the Island/the I-site | <input type="checkbox"/> |
| Recommendation by other traveller | <input type="checkbox"/> |
| Recommendation by taxi/tour bus/shuttle/bus driver | <input type="checkbox"/> |
| Other (please specify): | _____ |

17. What did you do on the Island this trip?

a) Wineries:

Did you visit any wineries? Yes No

If yes to 17a):How many wineries did you go to on this trip? _____

Did you do a wine tasting? Yes No

Did you go on a guided tour of the winery/vineyard?

Yes No

Did you buy any wine? Yes No

(Please answer the following even if you did not go to a winery this trip)

Have you bought Waiheke wine in a restaurant/store? Yes No

Have you been to a Waiheke winery before this trip? Yes No

Have you visited other New Zealand wineries before? Yes No

Do you try to visit wineries when in a wine region? Yes No

b) Eating:

i. Picnic/own arrangements Yes No

ii. Takeaways (from local store) Yes No

iii. Eat at a restaurant/café (excluding wineries) Yes No

If Yes, you did eat at a restaurant/café, please circle which best describes your experience for each of the following (1 = unhappy, 3 = neither happy nor unhappy, 5 = happy):

Quality of food/beverages 1 2 3 4 5

Quality of service 1 2 3 4 5

Value for money 1 2 3 4 5

Choice of venues 1 2 3 4 5

iv. Eat at a winery cafe/restaurant Yes No

If Yes, please circle which best describes your experience for each of the following (1 = unhappy, 3 = neither happy nor unhappy, 5 = happy):

Quality of food/beverages 1 2 3 4 5

Quality of service 1 2 3 4 5

Value for money 1 2 3 4 5

Choice of venues 1 2 3 4 5

c) Transport on the Island:

i. Which forms of transport did you use on this trip? **(Please tick all the ones you used)**

Hire car Hire bike Hire scooter

Own vehicle Taxi/shuttle Public bus

Private vehicle Walk Organised tour

Other (please specify): _____

ii. If you went on an organised tour, was it a(n):

Island tour Wineries tour

Arts/cultural tour Eco tour

Other (please specify): _____

d) Visited natural attractions **(Please tick the ones you visited)**

Visited beach(es)

Visited regional park/reserve

Used walkways/walking paths

Other (Please specify): _____

e) Other activities you participated in? **(Please tick the ones you did)**

Recreational facilities (e.g. playgrounds, sports park)

Visited Stony Batter Historic Reserve

Attended a function (e.g. wedding, reunion)

Attended a special event

If you attended a special event, please specify which event(s):

Outdoor recreational activities (e.g. kayaking, horse riding)

Visited a museum

Visited an art gallery

Visited an artist in their studio

Other (Please specify): _____

18. **If you used/went to any of the following**, did you make a booking in advance?

Restaurant Yes No

Winery Yes No

Tour Yes No

Accommodation Yes No

Transport Yes No

19. How much do you estimate your travelling party as a whole spent on this trip to Waiheke (\$NZ)? (E.g. ferry, accommodation, pre-bookings, food, transport, activities, souvenirs...)

Less the \$50 \$200 - \$500 \$2000 +

\$50 - \$100 \$500 - \$1000

\$100 - \$200 \$1000 - \$2000

20. Is there anything you would have liked to do but didn't/couldn't?

Yes No

20a. **If so**, what were they:

21. Do you think you will return to Waiheke Island?

Yes definitely Yes probably Maybe Unlikely No

22. Would you recommend a visit to Waiheke Island to friends or relatives?

Yes No

23. Do you have any overall comments about your experience today, for example anything you particularly liked or disliked, or anything that could be improved?

SECTION 2: ISLAND SERVICES

24. Island services:

For each service that you used, please state how happy you were with each of the following (1 = not happy, 3 = neither happy nor unhappy, 5 = very happy):

a) Ferry

Value for money	1	2	3	4	5	N/A
Timing	1	2	3	4	5	N/A

b) Information about Waiheke

Availability	1	2	3	4	5	N/A
Usefulness	1	2	3	4	5	N/A

c) Information about activities on Waiheke

Availability	1	2	3	4	5	N/A
Usefulness	1	2	3	4	5	N/A

d) Visitor centre

Opening hours	1	2	3	4	5	N/A
Convenience of location	1	2	3	4	5	N/A
Helpfulness	1	2	3	4	5	N/A

e) Signposting

Sufficient information	1	2	3	4	5	N/A
Easy to follow	1	2	3	4	5	N/A

f) Bus service

Timing	1	2	3	4	5	N/A
Usefulness	1	2	3	4	5	N/A
Reliability	1	2	3	4	5	N/A

g) Toilets

Adequate number	1	2	3	4	5	N/A
Location	1	2	3	4	5	N/A
Cleanliness	1	2	3	4	5	N/A

h) Taxi/shuttle services						
Usefulness	1	2	3	4	5	N/A
Reliability	1	2	3	4	5	N/A
Value for money	1	2	3	4	5	N/A

Do you have any comments about the services on the Island?

SECTION 3: DETAILS ABOUT YOU

Just to finish, it would be helpful to find out a little about you.

25. Are you: Male Female

26. Do you currently live in NZ?
 Yes No

If Yes to question 26:

27. Do you live in Auckland? Yes No

 If not, where in New Zealand do you live: _____

If No to question 26:

28. Where do you live (**please put city and country**)? _____

29. Age:

- 15-19
- 20-24
- 25-29
- 30-34
- 35-39
- 40-44
- 45-49
- 50-54
- 55-59
- 60-64
- 65 and over

30. Household income:

- NZ\$20,000 or below
- NZ\$20,001 – 30,000
- NZ\$30,001 – 50,000
- NZ\$50,001 – 70,000
- NZ\$70,001 – 100,000
- NZ\$100,001 and above

Thank you for your time.