



# Nelson City Camper Survey 2020

# Executive Summary

Over the summer of 2019/20 Xyst Ltd carried out a survey of campers who utilised eight free camping facilities provided by Nelson City Council.

The aim of the survey was to improve the Council's understanding of campers in Nelson City to help improved strategic responses to camping issues.

The survey found not all campers using free camping sites in Nelson are the same. From the 193 campers surveyed, four distinct types of campers were identified, they are:

- Working Holiday Tourers (51%)
- Short Term International Visitors (36%)
- Local Campers (10%)
- Short Stay Holiday Makers (3%).

(refer to Camper Profile section of this report for the characteristics of each type of camper).

The majority of all respondents surveyed were international, predominantly from Europe and the UK with over half from Germany and France with many under the age of 30. Almost half were travelling in New Zealand for six months or more.

Working Holiday Tourers and Short Term International Visitors made up three quarters of all respondents and campers travelling with one other person, either couples without children or friends travelling together most common. In contrast families with children represented a very small portion of all respondents. Similarly a small number were New Zealanders living but not working in the Nelson region.

Privately owned modified vans/people movers were the most common vehicles camped in across all respondents, with cars/SUVs/utilities/station wagons the least common. Rented vehicles were mainly used by Short Term International Visitors with over half being purpose built campervans.

Almost 90% of all respondents vehicles had a current self containment certificate. Portable toilets were the most common toilet facility. However, although almost all vehicles had toilet facilities, less than one third had been used on this trip. Shower facilities were far less common than toilets and dishwashing facilities in vehicles.

Over the five days prior to the survey respondents spent 80% of total nights at free camping sites. Paid campsites were the next most common with very few staying in other forms of paid accommodation.

Less than half of all respondents identified having a total budget for for their trip but more than half identified having a budget for daily expenses with the median budget being \$25 per

person per day. However, Working Holiday Tourers' and Local Campers' median budget was less than \$25 per day.

The highest median spend on daily expenses over the five days prior to the survey was on vehicle hire with the lowest on accommodation, eating out and hospitality.

Despite Working Holiday Tourers being the largest visitor type by total number, less than one third spent on events, activities and attractions. This reflected the overall findings that 70% of respondents did not spend on this expense in the five days prior to the survey.

Respondents rated their overall camping experience in New Zealand highly with almost all rating it as expected or better. The majority of negative responses came from the few New Zealand respondents.

Camping Apps, in particular CamperMate, was the most common way respondents found free camping sites in Nelson. Prior to camping at a free camping site provided by Nelson City Council, the majority of respondents had either stayed locally or come from other parts in the Nelson/Tasman area or from Marlborough. Abel Tasman National Park was the most common destination respondents intended to visit next with the majority of other next destinations being within 2 hours' drive from Nelson City Centre.

# Summary of survey data



93%

International visitors



68%

under 30yrs old



4%

families with children



47%

staying in New Zealand for six months +



80%

of total nights were spent at free camping sites



59%

of rental vehicles were purpose built campervans



87%

of campers vehicles had toilet facilities (77% not yet used)



\$60

median spend on groceries



\$10

or less per day on average spent on accommodation over five days



\$60

median spend over five days



\$25

median daily budget per person for expenses



70%

did not spend on events/activities over five days



64%

of campers didn't identify having a total budget for their trip



87%

used camping apps to find the free campsite they were at



52%

intended staying 2 nights at their current location



92%

felt the Nelson free camping locations were as expected or better.



3%

of total nights spent in paid accommodation (other than paid campsites)



63%

intend their next destination to be within the Nelson/Tasman region

# Introduction

Xyst Limited was engaged to undertake a survey of campers who utilised the freedom camping facilities provided by Nelson City Council over the summer of 2019/20. The aim of the survey was to improve the Council's understanding of the nature of freedom campers in Nelson City so that the Council can make improved strategic responses to camping issues. The survey was funded by the Ministry of Business, Innovation and Employment (MBIE) from the 2019 Responsible Camping Initiatives fund (Tourism Facilities Development Grants).

## Context

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

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

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

From 6 January 2020 to 19 March 2020 the Council provided a day use Camping Hub at the former Shell Petrol Station at 20 Halifax Street. This hub provided additional toilet, shower and waste disposal facilities and was free to use by both self-contained and non-self contained campers.

# Method

Xyst undertook face-to face interviews with 193 campers located at the Camping Hub or free camping sites using preset questions developed by Xyst and NCC. Questions focused on the following six areas:

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

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

Interview Location	No.
Montgomery Car Park	48
Camping Hub	32
QEII Drive Gardens Car Park	25
Wakatu Car Park	24
Trafalgar Park (Kinzett Terrace Car Park)	24
Isel Park Car Park	17
Maitai Cricket Ground Car Park	15
Buxton Car Park	8

# Camper Profiles

## Working Holiday Tourers

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

-  51% of respondents
-  68% stay 6 months +
-  89% modified vans
-  65% German/French
-  98% work in other regions

## Short Term International Visitors

International short-term visitors are those who generally spend between two weeks and three months (occasionally up to six months) in New Zealand and are travelling on a visitor visa. They travel in a mix of rented and privately-owned vehicles predominantly modified vans/people movers and purpose-built campervans. They stay for shorter periods of time, spend more on activities, entertainment and eating out and stay mostly in free campsites where possible but also utilise paid campsites.

-  36% of respondents
-  68% stay 1-3 months
-  86% rent vehicles
-  72% from UK/Europe

## Local Campers

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



10% of respondents



65% work in region



45% solo campers



30% New Zealanders

## Short Stay Holiday Makers

These campers are generally New Zealanders visiting the district on holiday for short periods mostly under two weeks. The majority travel in their own purpose-built self-contained campervan and generally seek the opportunity to stay in free sites where possible. This small group has the highest daily expenditure budget, however, doesn't generally spend on activities, entertainment or eating out.



3% of respondents



67% over 40 yrs old



100% purpose built



83% New Zealanders

# Survey Analysis

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

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

	Nationality	No.
	Germany	58
	France	45
	Other European country	31
	UK	19
	New Zealand	14
	USA	8
	Australia	6
	Canada	5
	Other	7



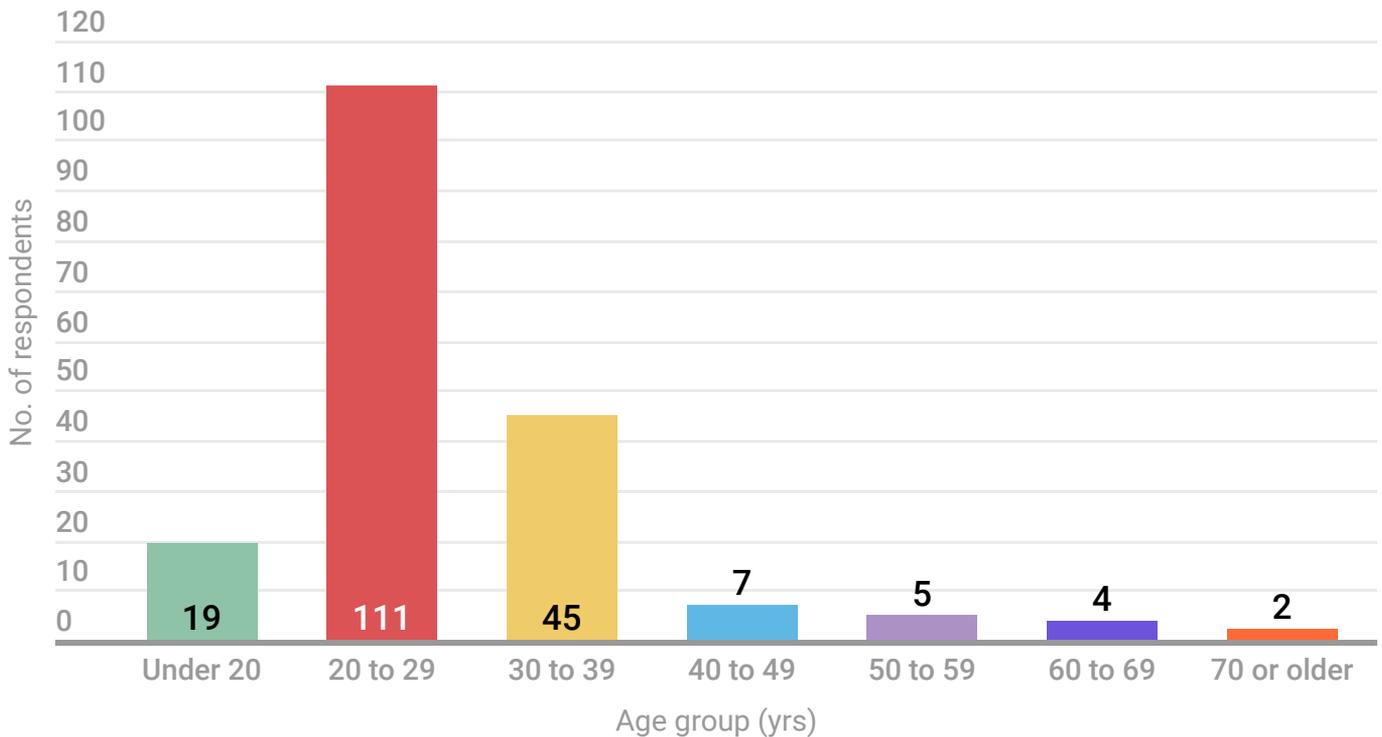
### Insights

93% of respondents were international with 79% from Europe and the UK. Visitors from Germany (30%) and France (23%) made up over half of the total respondents. Of those, 79% were under the age of 30.

65% of international visitors intended to stay in New Zealand more than three months and 42% longer than six months.

Although New Zealanders were the fifth largest group by nationality they only represent 7% of total respondents.

# What best describes your age group?

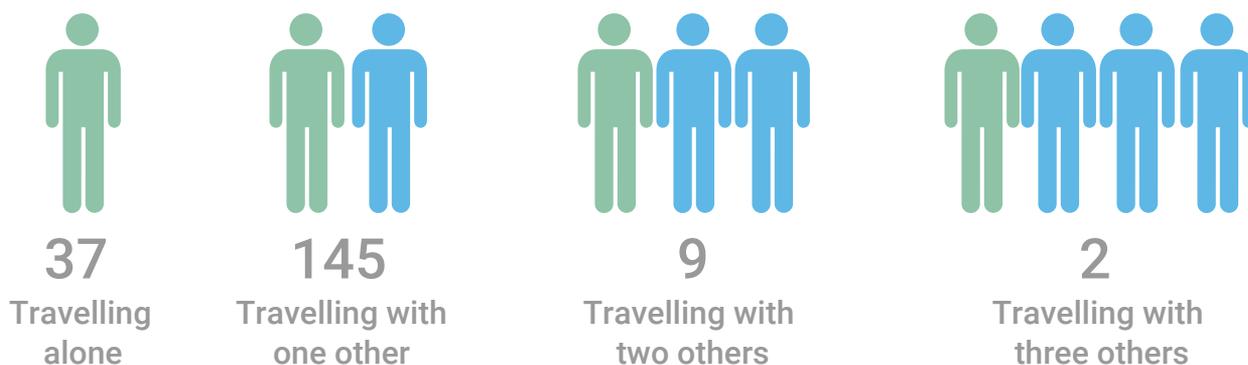


## Insights

The majority (67%) of respondents were under 30 years old. Of those, 61% were Working Holiday Tourers and 29% were Short Term International Visitors. The next largest group was the 30-39 age group who represented 23% respondents; 49% of this age group were Short Term International Travellers and 40% are Working Holiday Tourers.

International respondents over 40 years old were all Short Term International Travellers. 64% New Zealand respondents were also over 40 years old, 44% were Short Stay Holiday Makers and 44% were Local Campers.

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



## Insights

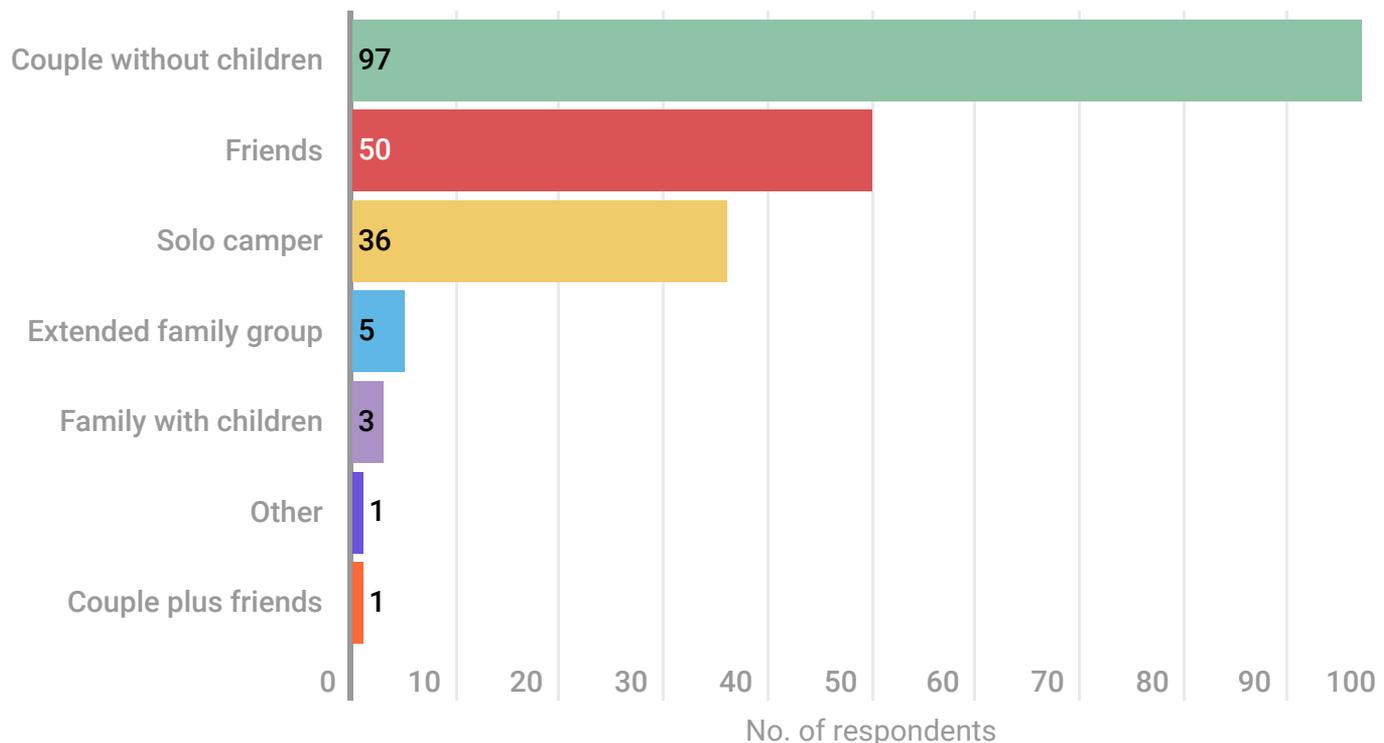
75% of respondents were travelling with one other person. Of those, 86% were Working Holiday Tourers and Local Campers.

67% of respondents described themselves as couples without children and a further 30% were friends travelling together.

Nine respondents were travelling in a group of three, with six of these respondents travelling with friends and three being families with children.

Only two respondents were travelling in a group of four; both were Short Stay International Visitors travelling as a family with children.

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



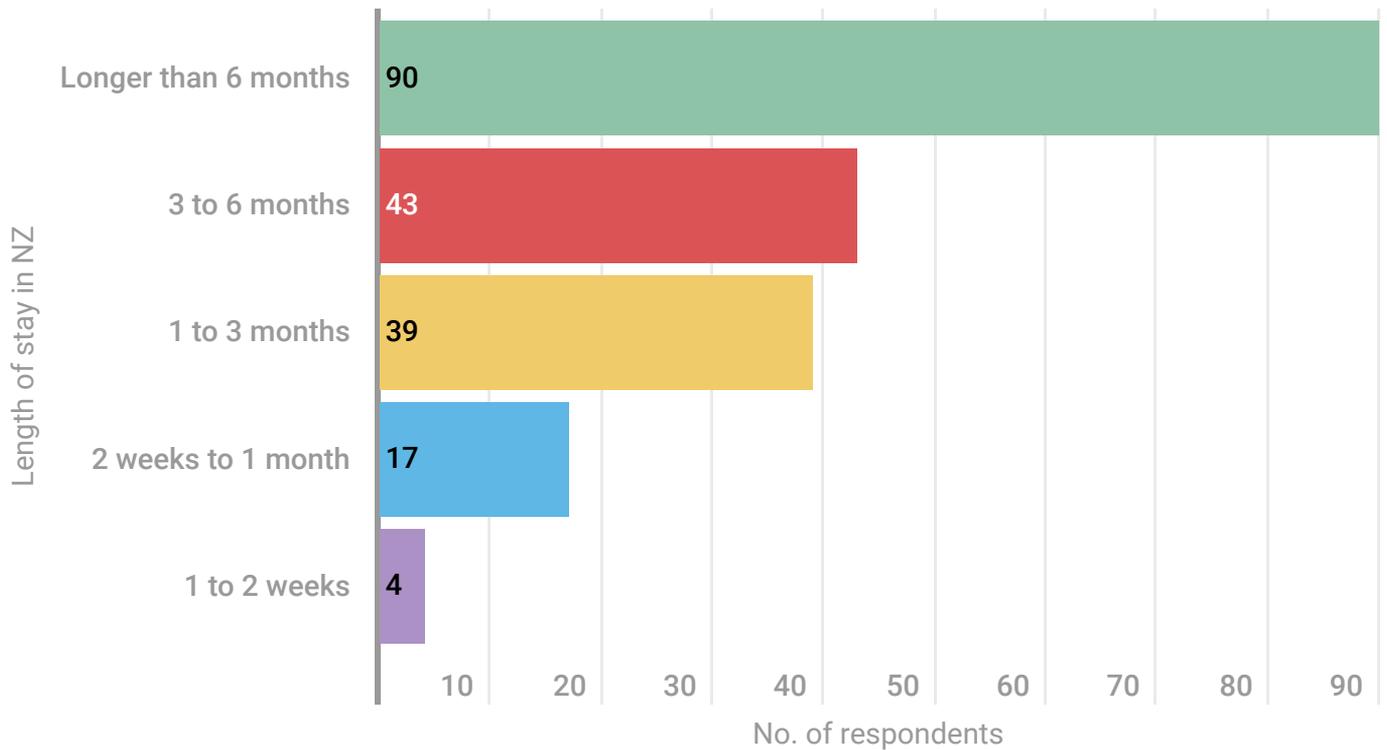
## Insights

75% of respondents described themselves as couples without children or friends travelling together. Of those, 53% were under the age of 30. Similarly 53% of these two groups were Working Holiday Tourers and 46% Short Stay International Visitors.

Like couples without children and the friends groups above, the majority (72%) of solo campers were International Working Holiday Tourers and Short Term International Visitors. Solo campers also made up 50% of all Local Campers.

Families with children only represented 4% of respondents. They were all visitors from the UK or Europe with the exception of one family from New Zealand. The majority (75%) of families with children were either Short Term International Visitors or Working Holiday Tourers. The other two respondents were a Local Camper working in the Nelson Region and a Short Stay Holiday Maker from New Zealand.

# How long is your trip within New Zealand?



## Insights

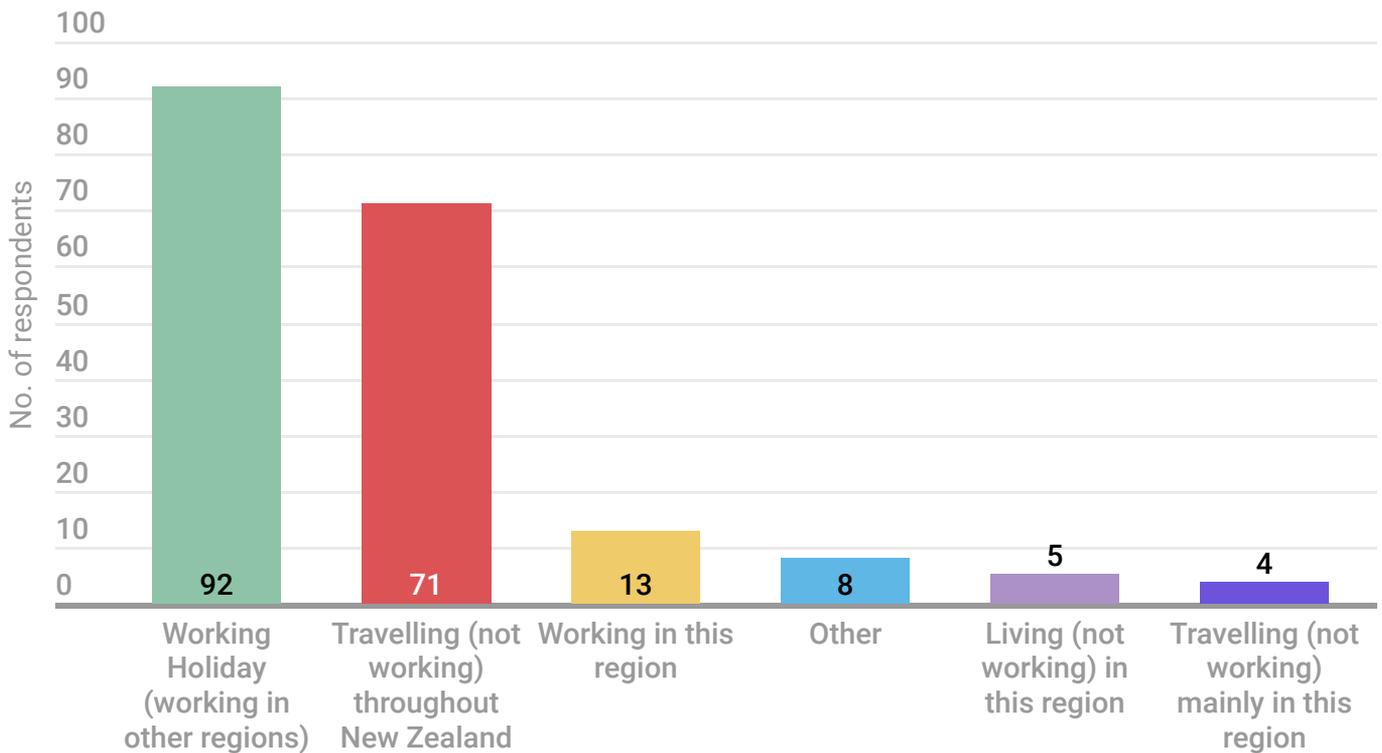
47% of respondents intended travelling in New Zealand for longer than six months. Of those, 74% were Working Holiday Tourers and 71% were from Europe, particularly Germany and France.

Respondents travelling for between three to six months were exclusively international visitors of which 79% were under 30 years old and generally travelled as a couple or with friends. Similarly, 77% of those travelling for up to three months were Short Term International Visitors, 76% were travelling as a couple without children and 85% were under 40 years old.

49% of all respondents staying in New Zealand for one to three months, 79% staying three to six months and 77% staying longer than six months, were all under 30yrs old.

Those travelling for two weeks or less were the smallest group and only represented 2% of all respondents. Of those, three were couples without children from New Zealand.

# What is the purpose of your trip?



## Insights

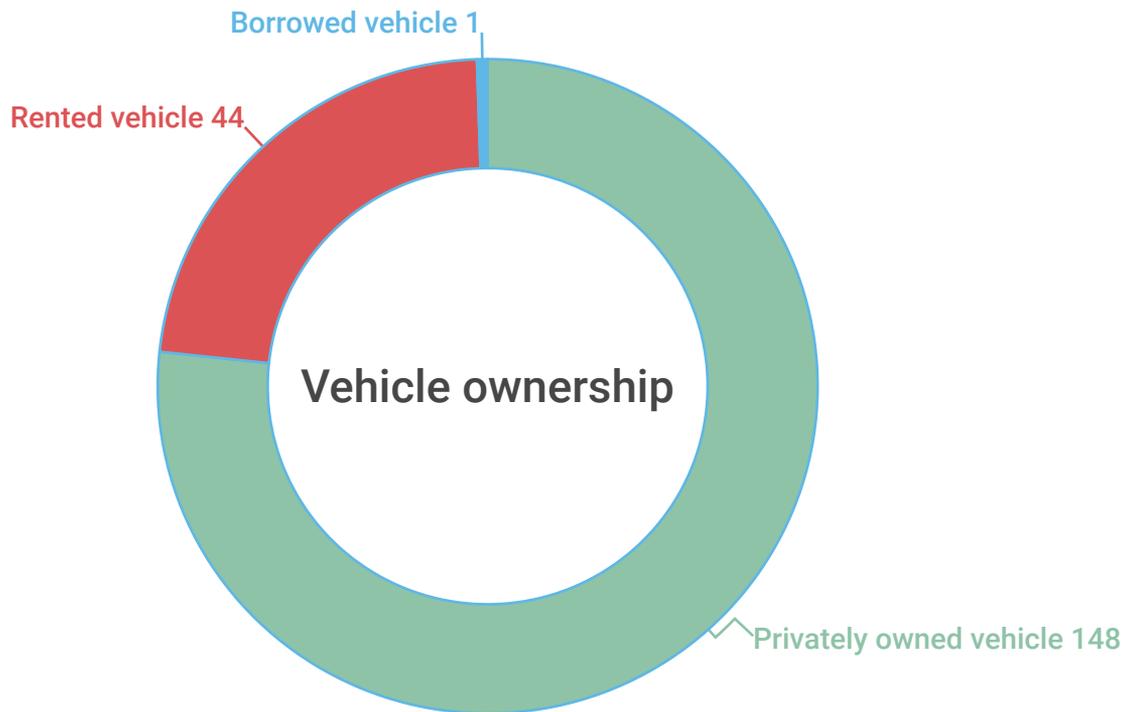
The purpose of travel for 48% of all respondents was a working holiday in other regions of New Zealand. 79% of this group was under 30 years old and 80% were from mainland Europe.

37% of respondents were travelling (not working) throughout New Zealand and were generally international visitors. Of those, 77% of those were staying in NZ less than three months.

7% of campers surveyed were working in the Nelson region. All intended staying longer than three months and 61% longer than six months. They were also all aged between 20-29 with the exception of one respondent aged between 30-39.

All five campers who identified they were living but not working in the Nelson Region were from New Zealand and all aged between 30-59. All intended to stay longer than six months except one who intended staying three months.

# How are you travelling between camp sites?



## Insights

The majority (76%) of respondents travelled in personal vehicles (privately owned) with 84% of these being modified vans/people movers. Significantly less (9%) travelled in privately owned purpose-built campervan/caravan/motorhome and only 7% in privately owned car/SUV/utility/station wagon.

23% of respondents travelled in rented vehicles which consisted of predominantly self-contained purpose-built campervan/caravan/motor homes (59%) and modified vans/people movers (32%). 89% of rented vehicles were utilised by Short Term International Visitors.

# What are you camping or sleeping in?



40

Purpose-built  
campervan



139

Modified  
van/people  
mover



13

Car/SUV/Utility/  
station wagon



1

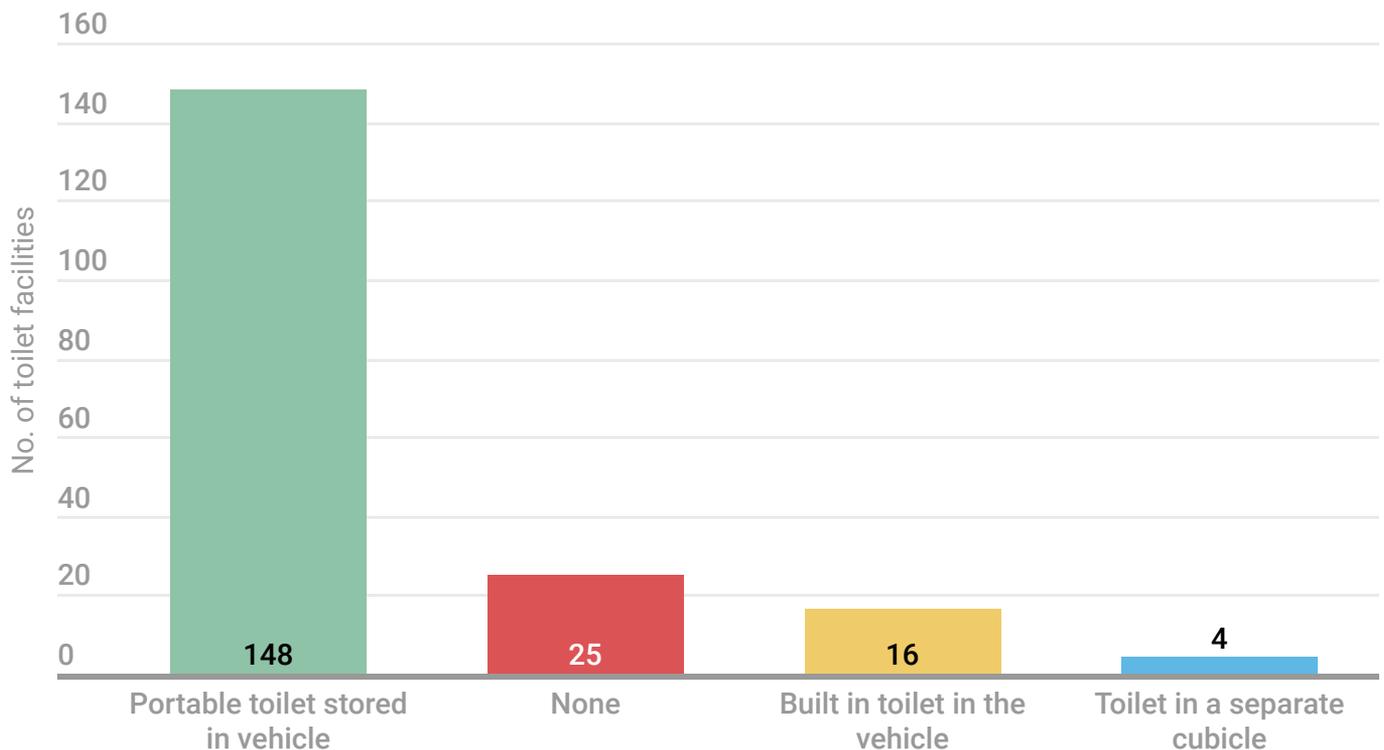
Tent

## Insights

Modified van/people movers were the most common vehicle to camp in for most respondents, regardless of demographic, travel purpose or trip duration, with the exception of New Zealand respondents where it was the least common with only two respondents (14%) travelling in this type of vehicle.

21% of respondents camped in purpose-built campervan, caravan, motorhome or house bus. Of those 70% were traveling for less than three months with 63% of this type of vehicle utilised by Short Stay International Visitors. All Short Stay Holiday makers camped in purpose-built campervan, caravan, motorhome or house buses, as did 64% of all New Zealand respondents.

# What toilet facilities have you brought with you?



## Insights

Portable toilets stored in the vehicle were the most common toilet facility across all vehicle types and accounted for 88% of all toilet facilities.

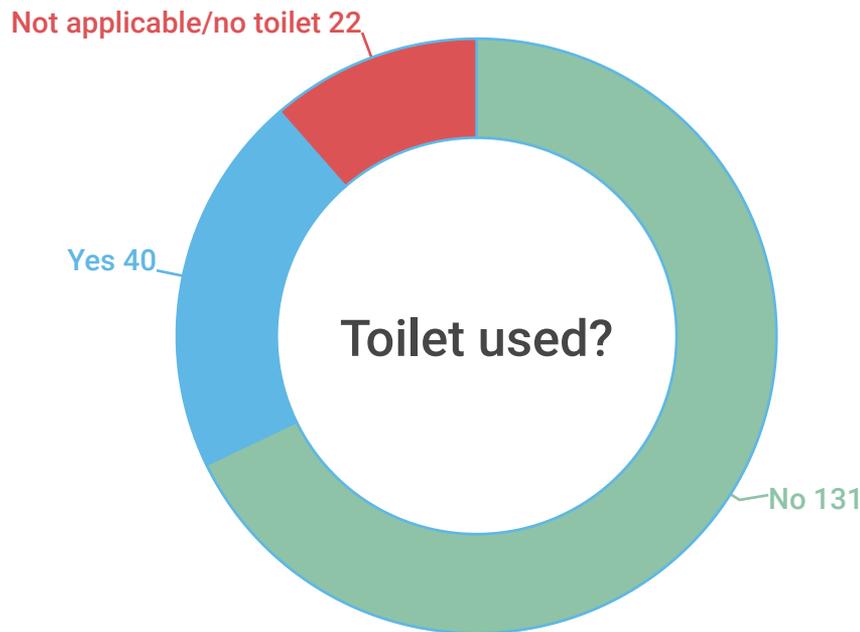
92% of modified vans/people movers had toilet facilities. Portable toilets stored in the vehicle were the only type of toilet used in these vehicles.

Built-in toilets and toilets in separate cubicles were only located in purpose-built campervan, caravan, motorhome, or house buses. However, 45% purpose-built campervans had portable toilets making them slightly more common than the 40% that had built in toilets, and much more common than the 10% with toilets in separate cubicles.

13% of respondents reported not having any toilet facilities at all in their vehicle.

85% of car/SUV/utility/station wagons did not have toilet facilities with only two respondents reported having portable toilets in the vehicle.

# Have you used your own toilet facilities on this trip?



## Insights

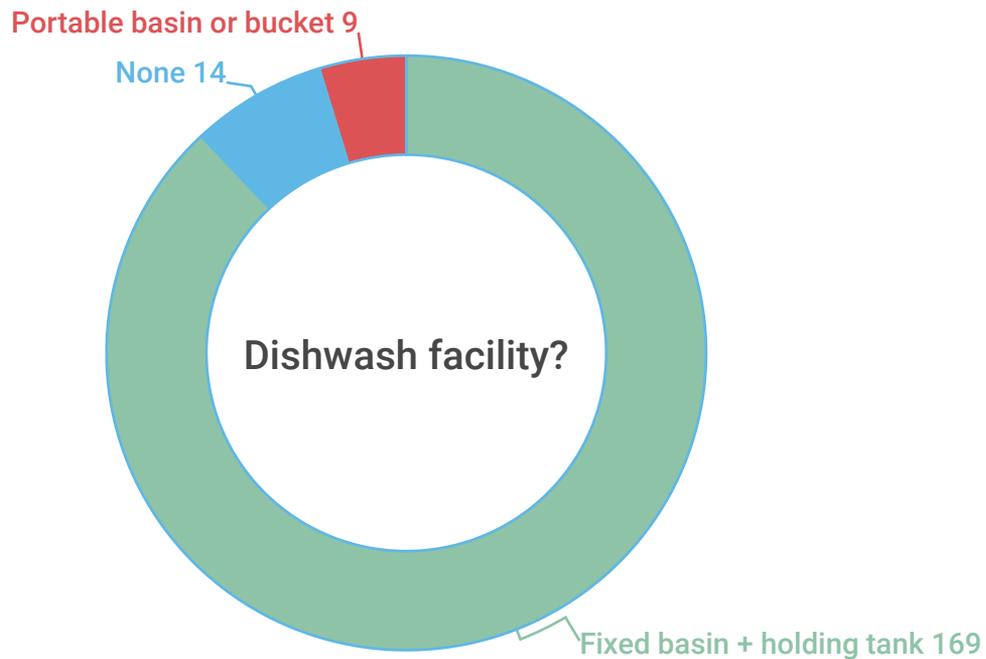
Although 87% of all respondents had personal toilet facilities in their vehicles, 77% had not been used on their trip.

The most likely toilet facilities to have been used were those built in or toilets in separate cubicles located in purpose-built campervans, caravans, motorhomes, or house buses, with all but one respondent with this type of toilet not having used it on their trip.

Portable toilets stored in vehicles were the most common type of toilet facility across all vehicle types. However, they were the least used, with only 13% of respondents with a portable toilet facility having used it on their trip.

86% of portable toilets were located in modified vans/people movers, and were the only type of toilet facility identified with these vehicles. Only 12% of portable toilets in modified vans had been used, compared to 38% that had been used in purpose-built campervans, caravans, motorhomes, or house buses. One of two portable toilets carried in a car/SUV/utility/station wagon had been used.

# What dishwashing facilities have you brought with you?



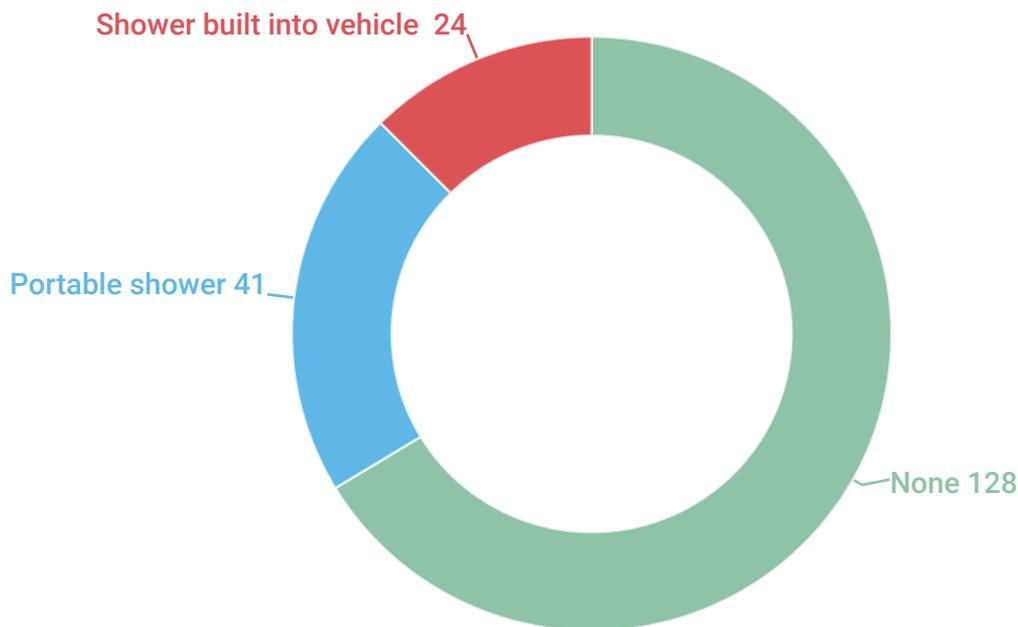
## Insights

88% of respondents had dishwashing facilities with waste water draining to a holding tank. This included 76% of modified vans/people movers and 96% of purpose built campervans, caravans, motorhomes, or house buses.

A small number of respondents (9) used a portable basin or bucket (tip water out) with the majority of these (7 of 9) located in privately owned modified vans/people movers. One respondent, who travelled in a modified van/people mover, utilised a fixed basin with water draining onto the ground.

Most (10 of 12) car/SUV/utility/station wagons generally did not have dishwashing facilities. This type of vehicle made up the 10 of the 14 vehicles overall that did not have dishwashing facilities.

# What shower facilities do you have?



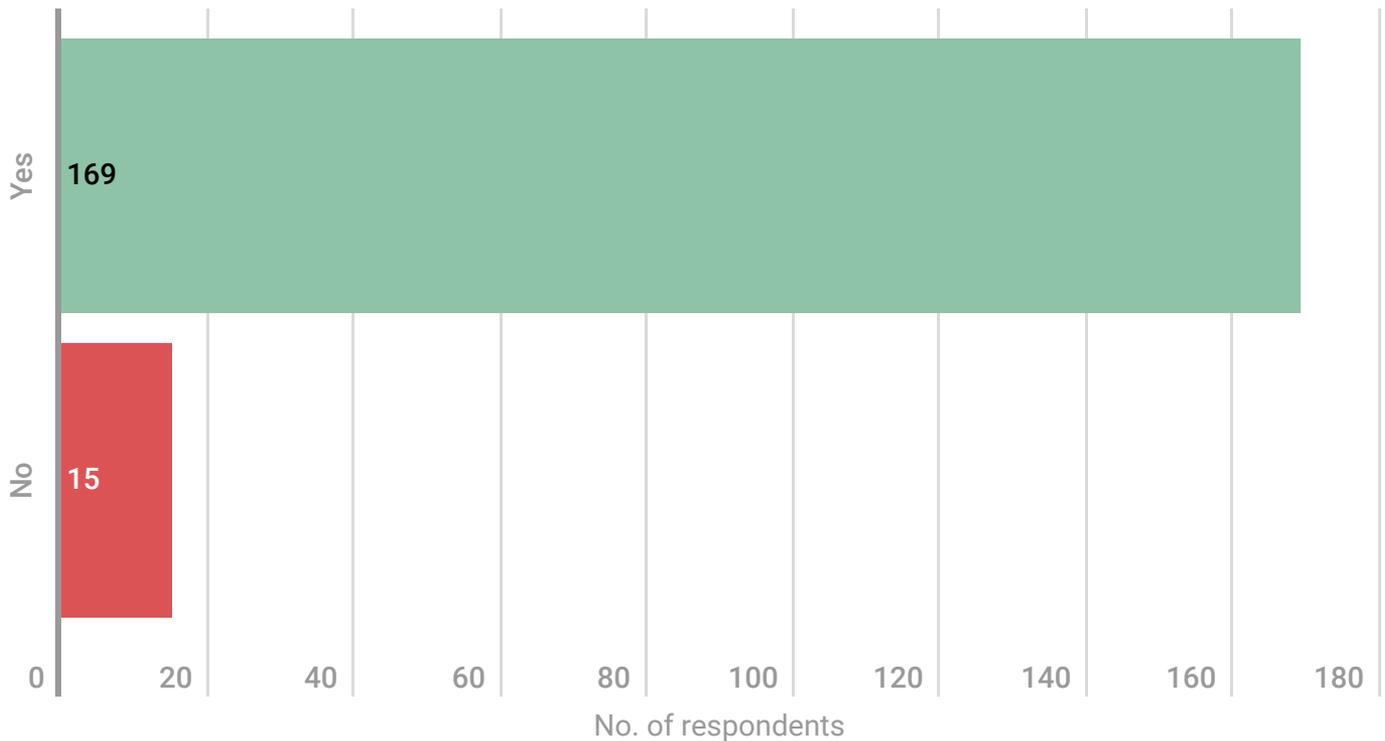
## Insights

34% of respondents had either portable showers or showers built in to their vehicle. This makes shower facilities by far the least common camping facility (of shower/toilet/dishwashing) in respondents' vehicles.

Of those respondents who had shower facilities, portable showers were the most common with the majority (80%) carried in modified vans and people movers. All but one of the remainder were located in purpose-built campervans, caravans, motorhomes, or house buses.

Almost all (92%) of showers built in to vehicles were located in purpose-built campervans, caravans, motorhomes, or house buses, with the remaining two (8%) built into modified vans/people movers.

# Does your vehicle have a current self-containment certificate?



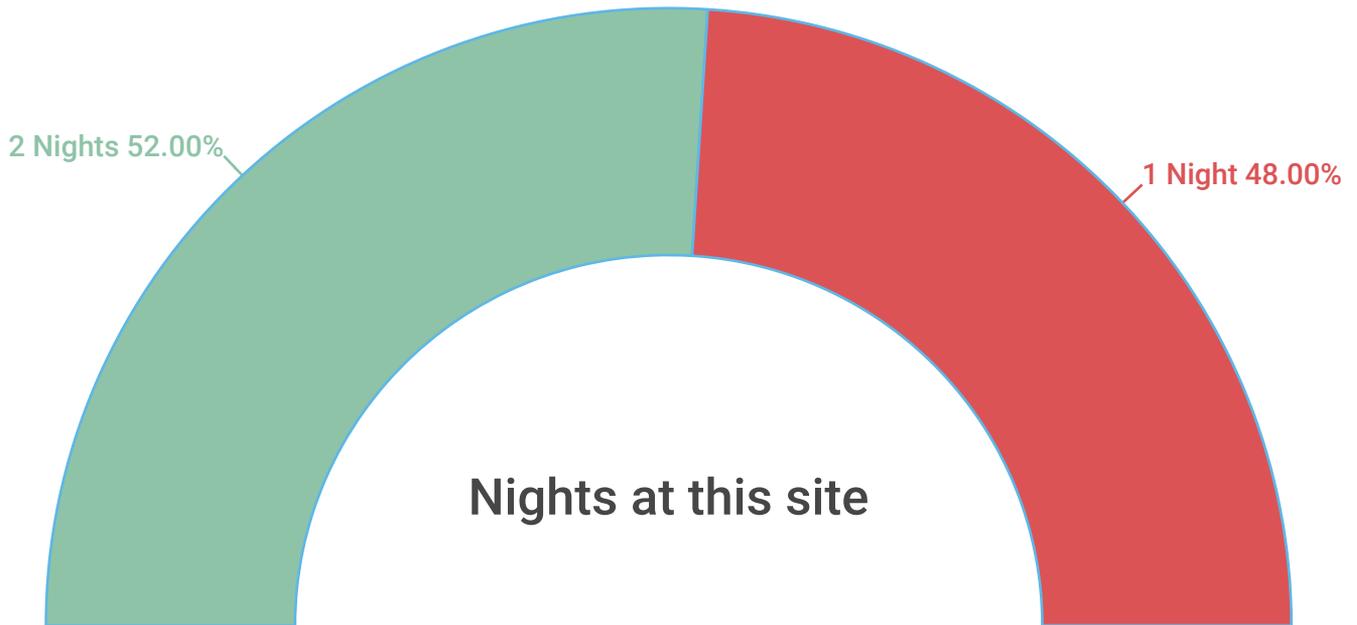
## Insights

88% of respondents vehicles had current self-containment certificates. Modified vans/people movers were the most common vehicle across all respondents surveyed and 94% had current self-containment certificates.

Purpose-built campervans, caravans, motorhomes, or house buses were the next most common type of camping vehicle and 95% had a current self-containment certificate.

13% of all respondents' vehicles did not have a current self-containment certificate. This included a mix of vehicle types. 85% of car/SUV/utility/station wagons did not have a current self-containment certificate with only two respondents travelling in these vehicles currently having a self-containment certificate.

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



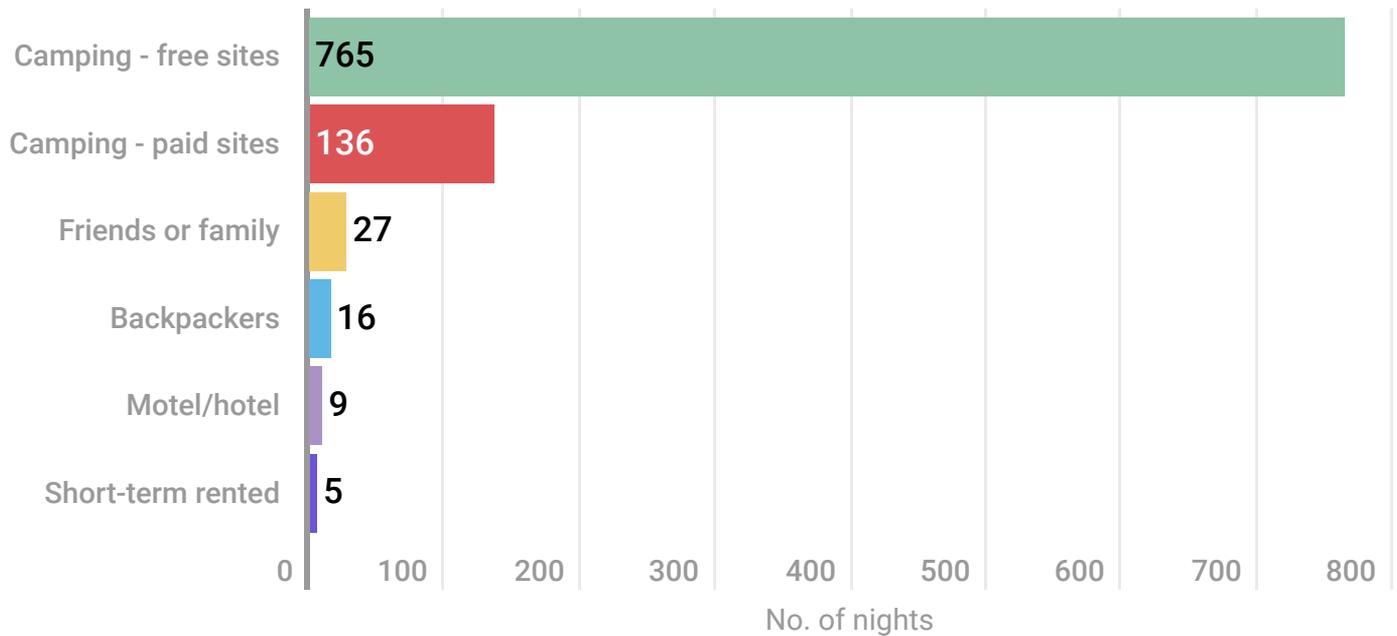
## Insights

Overall slightly more (52%) respondents only intended to stay two consecutive nights at the same location compared to 48% who intended to stay one night.

67% of Short Stay Holiday Makers and 58% of Local Campers intended staying two nights at the same location. These two groups were the most likely to stay two nights compared with Short Term International Visitors who were the least likely to, with only 16% intending to stay two nights at the same location.

Of all the free camping sites surveyed, Montgomery Car Park had most respondents intending to stay for just one night as well as the most who intended to stay two nights. However, it should be noted the largest number of interviews were undertaken at Montgomery Park.

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



## Insights

80% of total nights spent over five days prior to the survey in free camping sites.

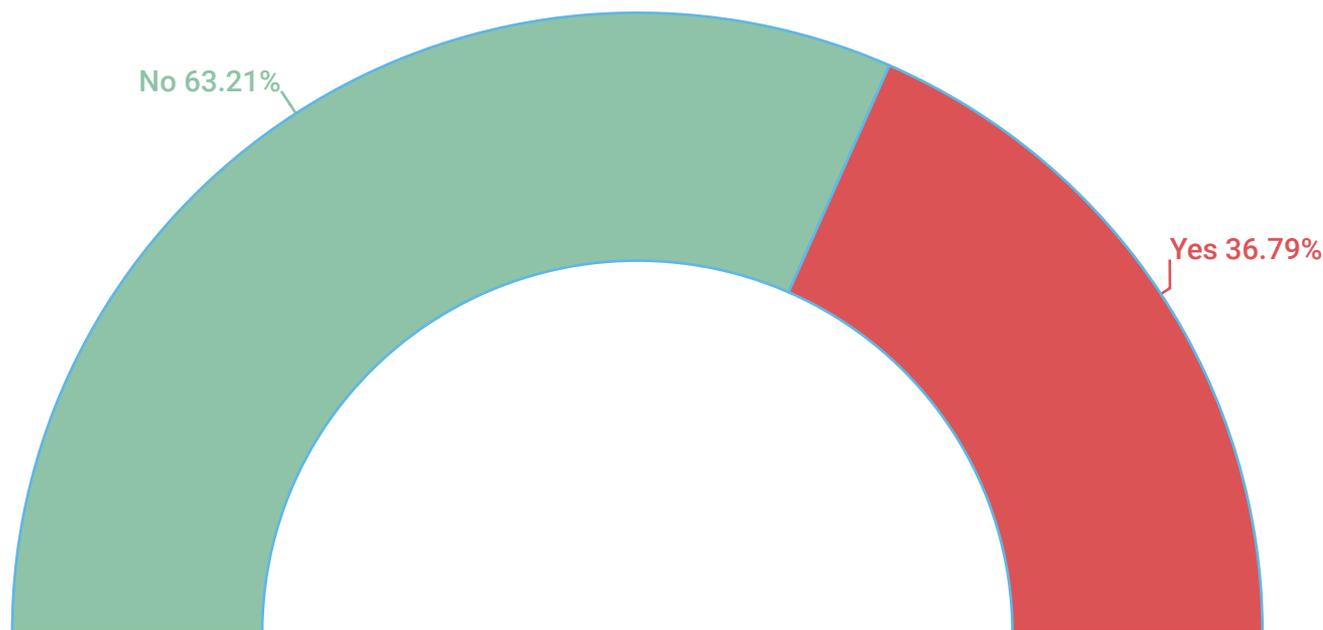
Of all paid accommodation types, paid camping sites were significantly more popular than others. Short Term international Visitors were the most likely to stay at paid camping sites spending 24% of their total nights over the five days prior to the survey in this type of accommodation, compared with Local Campers who spent just (8%) of their total nights in paid camping sites.

Working Holiday Tourers and Short Stay Holiday Makers spent 9% and 13% of their total nights respectively in paid camping sites for the five days prior to the survey. Families with children also stayed significantly more nights at paid camp sites than other respondents. This group spent 28% of the last five days in paid camp sites compared with just 14% of all nights by all other respondents.

Respondents travelling in purpose-built campervans spent 32% of total nights over the last five days in paid camping sites, compared to 10% of those traveling in modified van/people movers and 6% for those traveling in cars/SUV/utilities/station wagons.

Over a total of 961 nights, just 30 nights (3.1%) were spent in other forms of paid accommodation such as backpackers, hotels/motels and short-term rented accommodation (eg Air bnb/holiday houses). Similarly only 27 nights (2.8%) at friends or family.

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



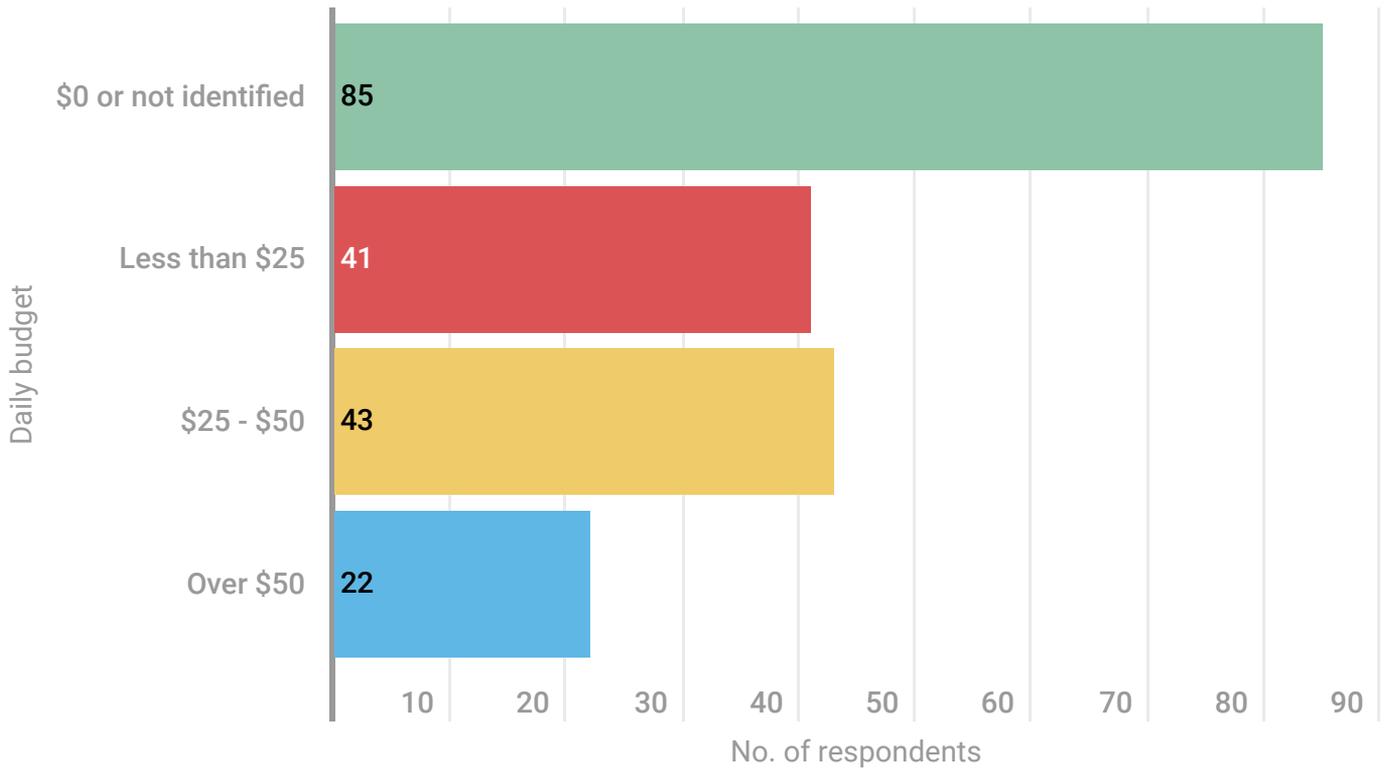
## Insights

37% of all respondents indicated they had a total budget for their trip. However, of those only 27% identified what their budget was.

49% of Short Term International Visitors confirmed having a total budget for their trip (the most of any group to do), compared to 17% of Short Stay Holiday Makers (the least of any group).

Younger international visitors (under 30 years old) were also significantly more likely than older visitors to have a total budget for their trip. This was reflected by 53% of under 20 year olds and 32% of 20-29 year olds identifying a total budget compared to 16% respondents over 30 years old identifying a total budget.

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



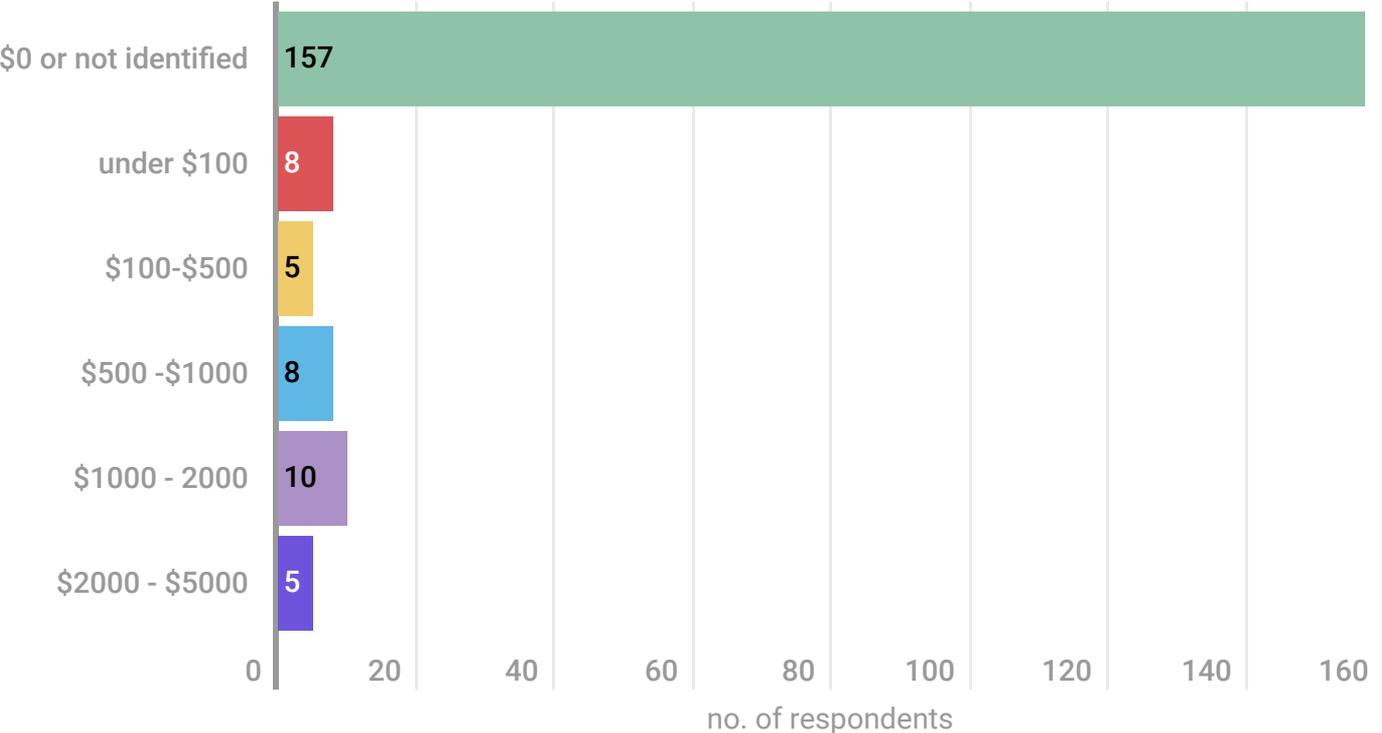
## Insights

56% of respondents identified a budget for everyday expenses with the median daily budget across all respondents of \$25 per person. The median daily budget directly correlated to the visitor's length of stay with Short Stay Holiday Makers having the largest median daily budget of \$75 per person per day, compared with Working Holiday Tourers who had the lowest median daily budget of \$22.50.

The lowest daily budget reported was \$5 and the highest \$120. 73% of Working Holiday Tourers and 80% of Local Campers had daily budgets under \$25 with 42% of all respondents not identifying any budget at all.

16% of all respondents had a daily budget of \$40 or more. Of those, 65% were Short Term International Visitors and half of all Short Stay Holiday Makers, compared with only 10% of Local Campers.

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

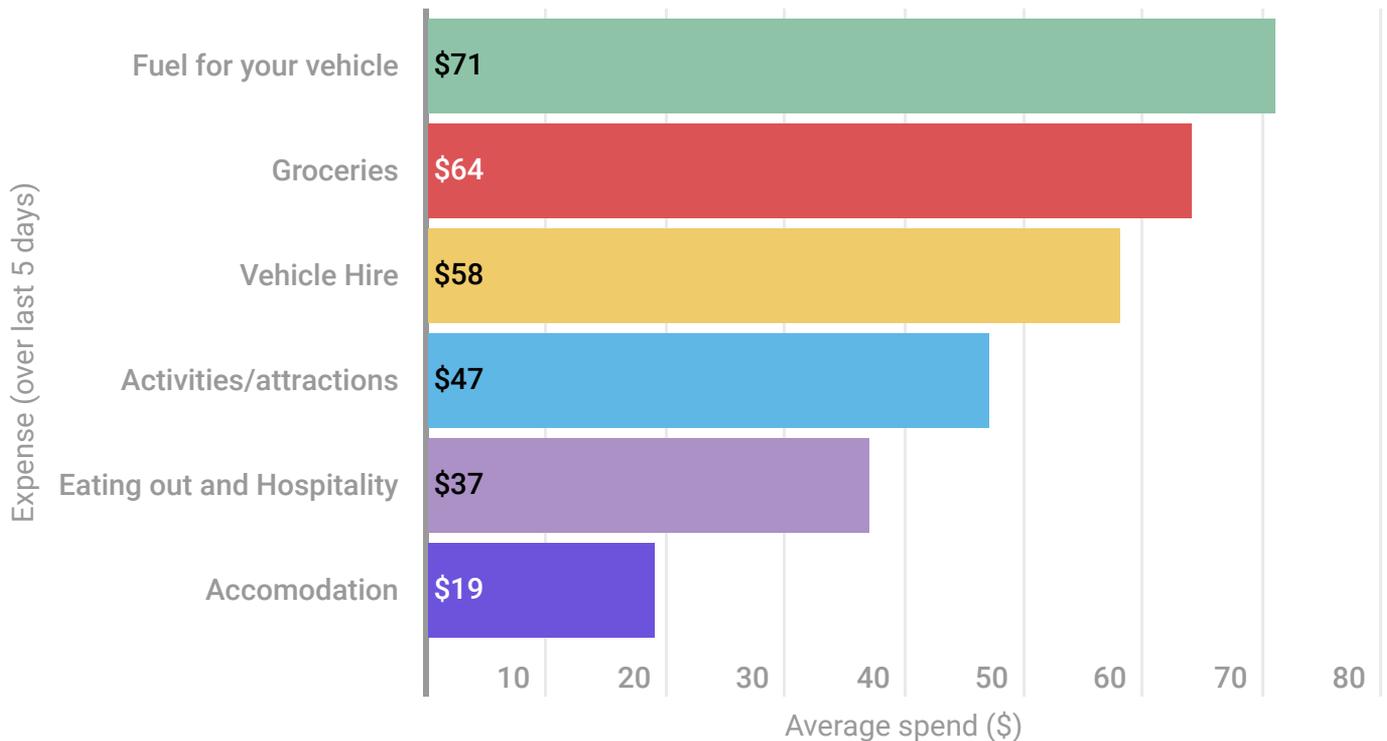


## Insights

Budgets for events, activities and experiences ranged between \$16 and \$5000. However, although 47% of all respondents intended travelling for more than six months, only 12% had a budget over \$500 and 82% of all respondents did not indicate having any budget for this expense at all.

Despite generally having the longest trip duration, Working Holiday Tourers and Short Stay International Visitors made up all but one of the respondents with budgets under \$500.

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



## Insights

### Vehicle Hire

89% spent on vehicle hire was by Short Stay International Visitors with 66% of hired vehicles being purpose-built campervans/caravans/ motorhomes/house buses. Although this expense was the third highest average spend over the five days prior to the survey, the median spend of \$190 was significantly higher than other expenses. As much as \$1100 was spent vehicle hire by one Short Term International Visitor, however, only six respondents spent \$500 or more on this expense.

### Services (eg vehicle repair, InterIsland ferry etc)

28% of respondents reported spending between \$10 and \$420 on services eg vehicle repairs etc over the previous five days with a median spend of \$114. Short Stay International Visitors had the highest median spend of \$130 followed by Working Holiday Tourers with \$110.

Working Holiday Tourers also accounted for 71% of those who spent over \$200. Local campers had the lowest median spend of \$30 with the exception of Short Stay Holiday Makers who did not report spending anything on services over this period.

### **Activities/Attractions (eg bungy jumping, jet boating, tours etc.)**

70% of respondents did not report spending anything on activities/attractions (e.g. bungy jumping, Jet Boating, tours etc) over the five days prior to being surveyed. For the 30% of respondents who did spend on activities and attractions the median spend was \$80 with spending ranging between \$5 and \$500.

41% of Short Stay International Visitors spent on activities and attractions and were the visitor type with highest median spend of \$190 per person as well as the most likely to spend on this expense. Only 24% of Working Holiday Tourers spent on activities and attractions despite being the largest visitor type by total number. They also had the lowest median spend of \$50 per person.

Median spend on activities by local campers was \$120 and although New Zealanders make up one third of this visitor type, all spending was by international visitors.

The largest single amount (\$500) spent on activities was by an International Short Stay Holiday Maker. However, that respondent was the only Short Stay Holiday Maker to spend on activities and attractions. Again although New Zealanders make up a large portion of this visitor type (five of the six) they did not spend anything on activities.

### **Groceries**

81% of all respondents spent \$100 or less on groceries with a median spend over all respondents of \$60 per person. Working Holiday Tourers and Short Term International Visitors had the lowest median spend on groceries of \$60, while Short Term Holiday makers had the highest median spend of \$100.

Working Holiday Tourers also had the lowest reported spend of \$5 for the five days prior to the survey as well as the second highest spend of \$175. However, the majority (80%) spent between \$50 to \$100 per person.

Although the highest single spend on groceries (\$490) was reported by a Short Term International Visitor, the majority (73%) of this group spent \$100 or less. Similarly although Local Campers had a slightly higher median spend of \$67.50 compared to the overall median of \$60, the majority (83%) spent \$80 or less and none spent more than \$100.

### **Fuel for your vehicle**

Median spend on fuel across all respondents was \$60 for the five days prior to the survey. Short Stay Holiday Makers had highest median spend of \$110 on fuel with all respondents spending between \$100 and \$120.

The most spent on fuel was \$350 by a Working Holiday Tourer. However, median spend on fuel for Working Holiday Tourers was \$62.50 and 71% of this group spent less than \$100. Local Campers had the lowest median spend of \$60 with only one Local Camper spending over \$100. One Local Camper also had the lowest reported spend on fuel of just \$5.

#### **Accommodation/camping sites (excluding campervan hire), hotels, motels**

The median spend on accommodation across all respondents of \$35 was significantly lower than other expenses except eating out and hospitality.

In the five days prior to being surveyed only 35% of all respondents had paid for accommodation with 59% of those spending on average less than \$10 per day.

The largest total spend was \$175 reported by a Short Term International Visitor from the USA who stayed three nights in a hotel/motel. The lowest spends were generally between \$6 - \$10 for paid camping sites.

Short Term International Visitors were the most likely to have stayed in paid accommodation with 48% having done so. They also had had the highest median spend of \$55 and made up the majority (72%) of all respondents who spent on average \$20 or more per day.

Working Holiday Tourers and Short Stay Holiday Makers each had median spends of \$20 and \$27 respectively, less than half that of Short Term International Visitors. The total number of respondents in these groups who had paid for accommodation was also significantly less with 31% of Working Holiday Tourers and just one Short Stay Holiday Maker having paid for accommodation in the five days prior to the survey.

Local Campers had the lowest median spend of \$10 and also only two (14%) had paid for accommodation, both at paid camping sites.

#### **Eating out and Hospitality (cafes, restaurants, bars)**

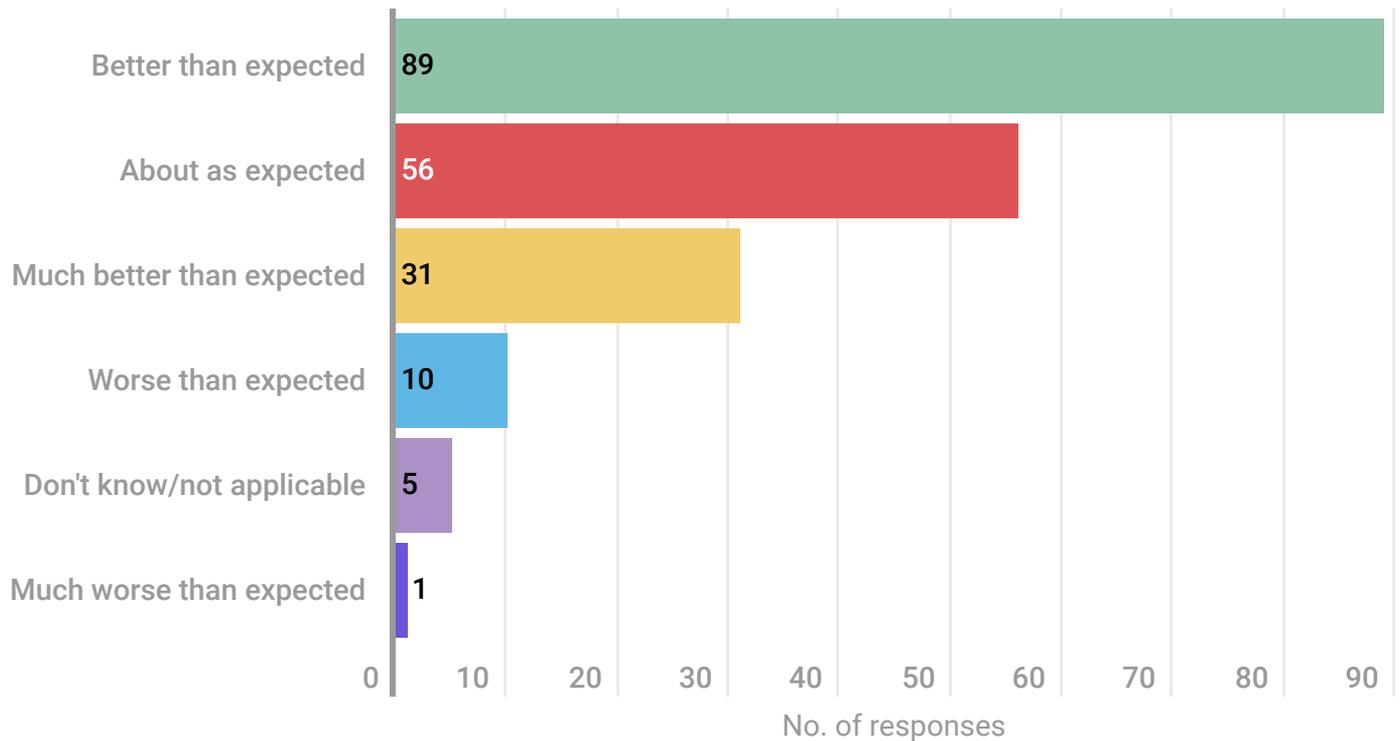
Eating out and hospitality had the lowest median spend of all expenses of \$30. Spending ranged between \$5 and \$200, with 25% of respondents not spending anything at all.

Short Term International Visitors had the highest median spend for this expense as well as accounting for 70% of all respondents who spent over \$100. They were also the most likely to spend on eating out and hospitality, with 85% having done so.

Working Holiday Tourers had the next highest median spend of \$30 although none of the respondents in this group spent over \$100, with almost half (48%) spending \$20 or less and 28% spending nothing at all.

Short Stay Holiday Makers and Local Campers had the lowest median spend of \$20 with no-one in either group spending more than \$50. Although 66% of Local Campers spent on eating out and hospitality, only one respondent spent over \$30.

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

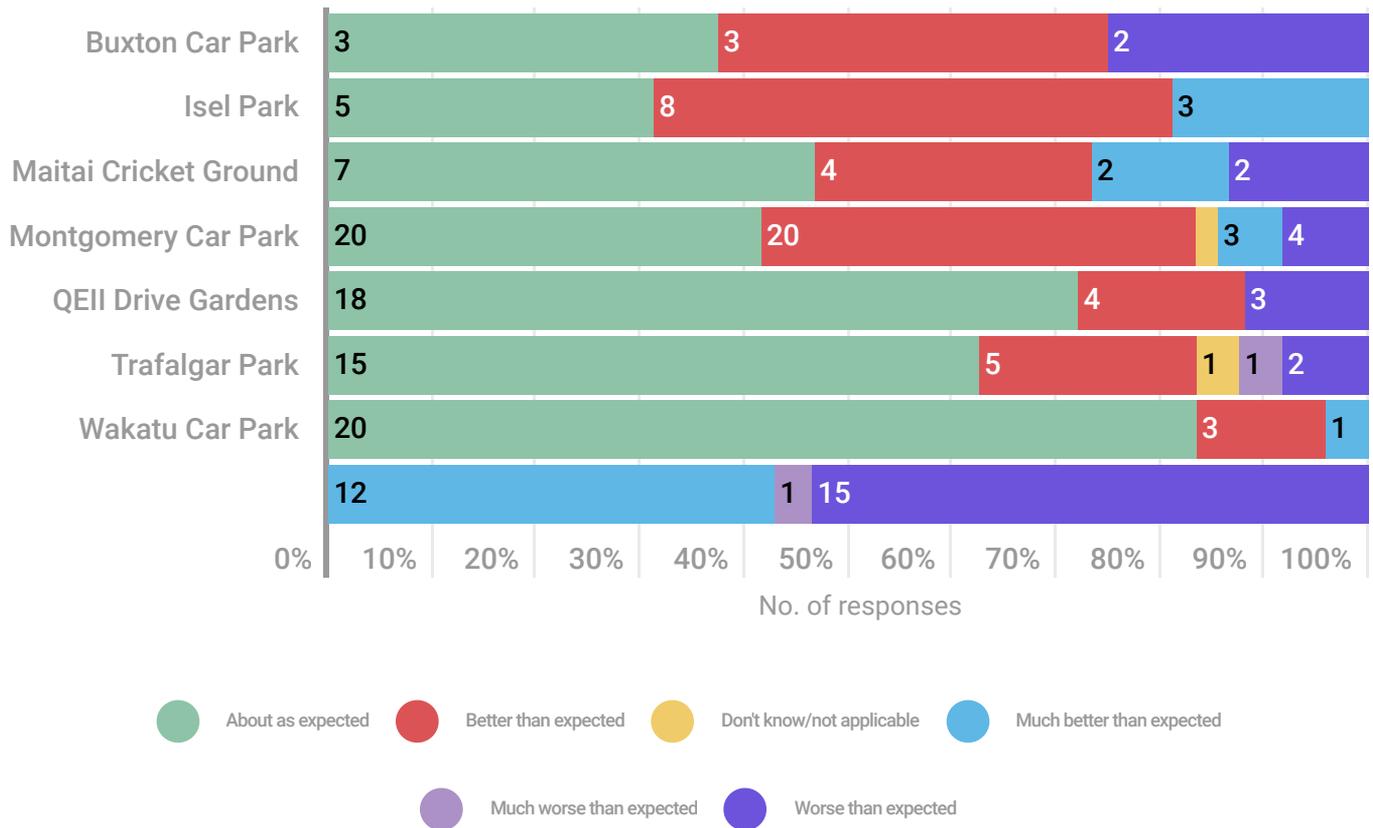


## Insights

The overall camping experience in New Zealand was rated highly with 92% of responses confirming their experience had been as expected or better. 62% rated their experience better or much better than expected with just 6% of respondents rating it worse than expected.

Of those who rated their camping experience as worse than expected over a quarter (27%) were New Zealanders. The only respondent to rate it much worse than expected was also from New Zealand. Similarly three of the five respondents who answered this question "Don't know/not applicable" were solo Local Campers from New Zealand living (not working) in the region.

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



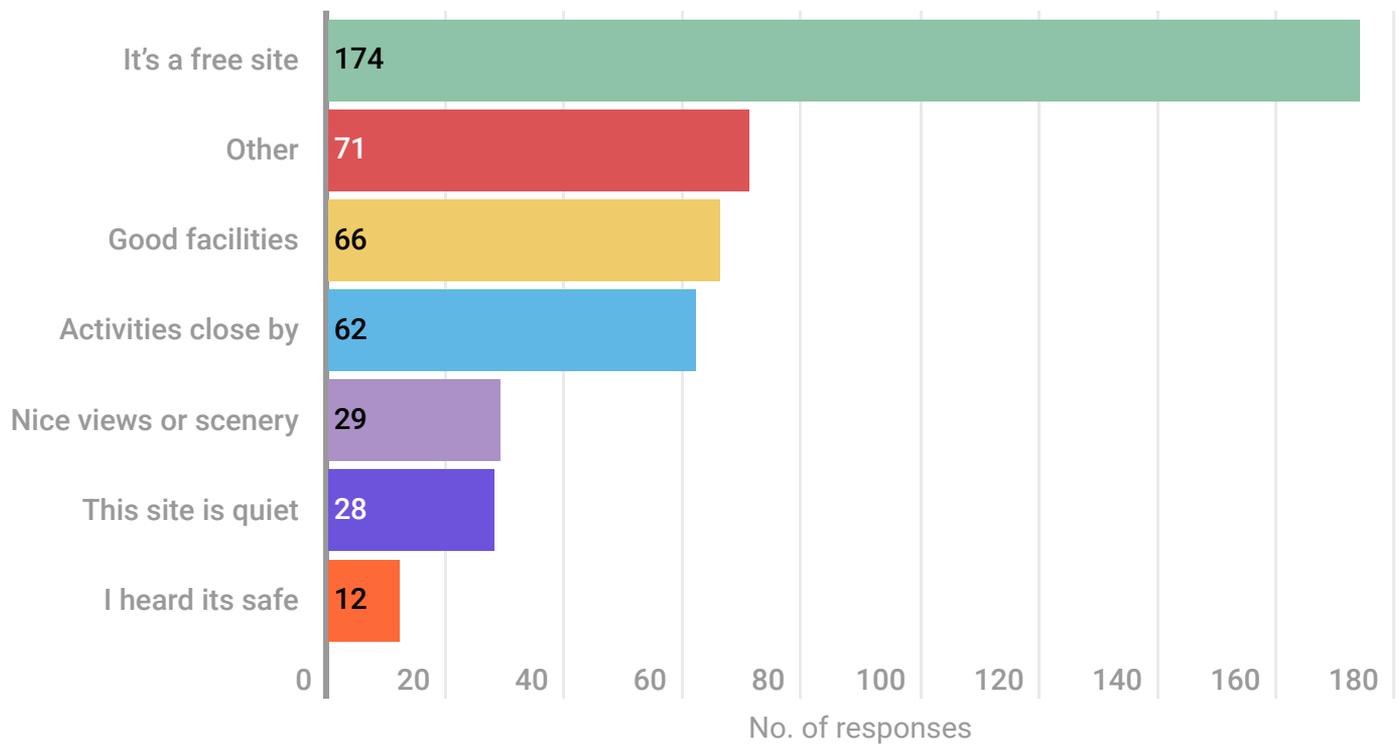
## Insights

When respondents were asked to rate their experience at the camping location in which they were surveyed, 51% felt the site was as they expected and 31% felt it was better than expected.

A further 6% rated the following locations as much better than expected: Isel Park car park, Maitai Cricket Ground Car Park, Montgomery Car Park, Wakatu Car Park.

Overall only 8% of all ratings were worse than expected and only one respondent rated their experiences as much worse than expected. These ratings were relatively evenly distributed over all sites with between two and four responses received for each site. Isel Park car park was the only site not to receive a negative rating.

# What attracted you to this site?



## Insights

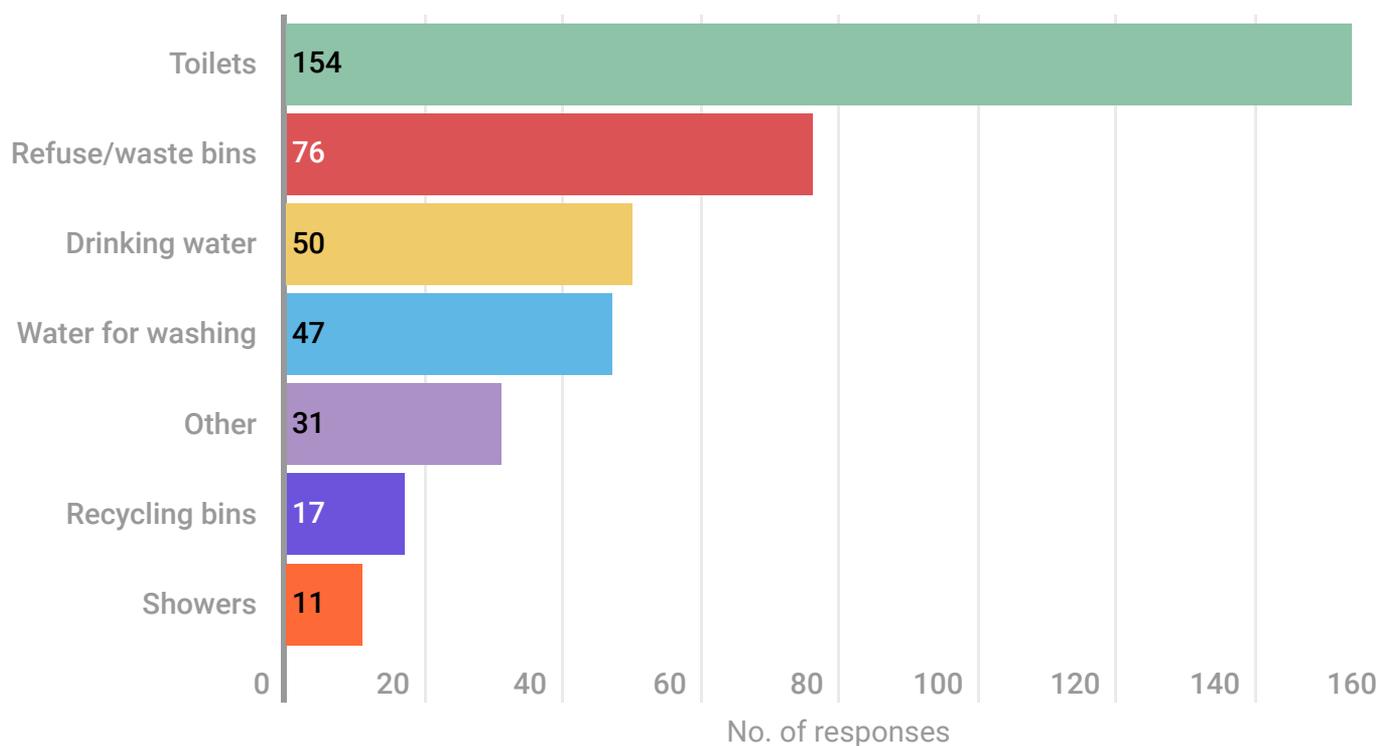
The most common reason (90%) campers were attracted to a the site in which they were staying was because it was free.

37% of respondents cited 'other' reasons that attracted them to the site. The most common of these were convenient location close to the central city, good reviews on apps like CamperMate, space and availability and good phone coverage.

Although 87% of respondents had toilet facilities and 87% had dishwashing facilities, good facilities were an attraction to 34% of all respondents.

Only 6% of respondents were attracted to a site because of its perceived safe location. Seven out of 12 of this group were camping alone and the remaining four were females.

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



## Insights

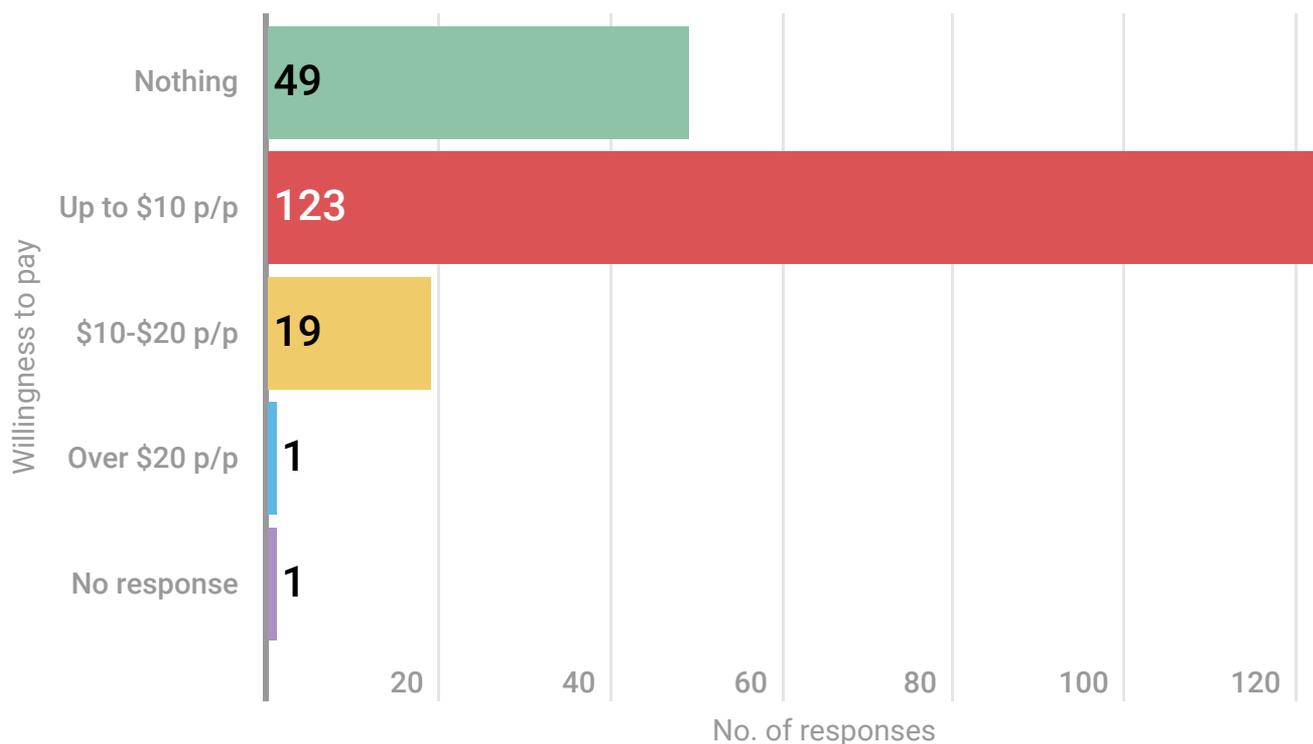
80% of respondents expected toilet facilities to be provided at free camping sites. Of those who did not expect toilet facilities, 85% had toilet facilities in their vehicle.

Waste bins were the next most expected facility at free sites. 43% of campers travelling in modified vans/people movers, 31% travelling in a car/SUV/utility/station wagon and 30% travelling in purpose-built campervan/caravan, motorhome or house buses expected waste bins to be provided.

Although only 34% of respondents reported having shower facilities (either portable or built in to their vehicle) only 6% of campers expected facilities to be provided at free sites.

16% of respondents expected some other facilities to be provided at free camping sites. The most common of these were flat and tidy parking spaces, picnic tables and safe and clean camping areas.

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

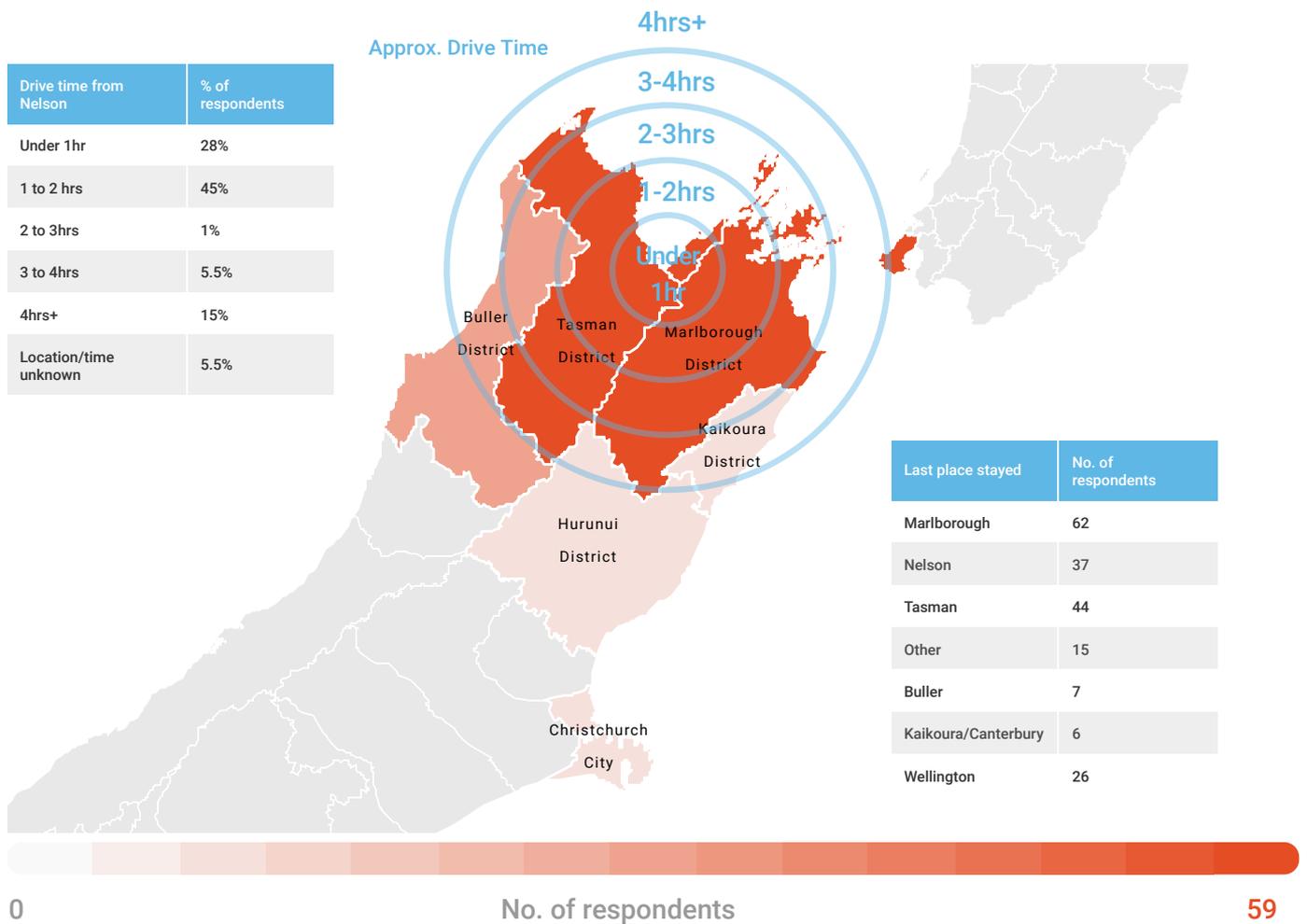


## Insights

74% of respondents indicated they would be willing to pay for basic facilities to be provided at freedom camping sites with 63.7% willing up to \$10 per night. A single Short Stay Holiday Maker from New Zealand was the only respondent who was willing to pay more than \$20 per person per night.

A quarter of all respondents weren't prepared to pay anything for basic facilities at freedom camping sites. Local campers were the least willing to pay for basic facilities with 30% not willing to pay anything.

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



## Insights

42% of all respondents stayed locally in the Nelson-Tasman Districts. With over half (53%) of those who stayed locally within a 30 minute drive of Nelson city centre. 29% of those staying in the in the Nelson-Tasman Districts (but staying more than 30mins from Nelson's city centre) stayed in Motueka. This was the most common location within the Nelson-Tasman districts that was more than 30 minutes from Nelsons city centre.

Marlborough was the next most common location. 32% of all respondents previously stayed in the Marlborough District with 37% staying in Picton, slightly more than the 32% who stayed in Blenheim and the 25% who stayed in Havelock.

73% of all respondents previously stayed within two hours of Nelson city centre. Of those, 45% stayed between one to two hours away and 28% stayed within an hour of the city centre. 49% of the remaining respondents stayed in Wellington prior to arriving in Nelson.

# How did you hear about this camp site?



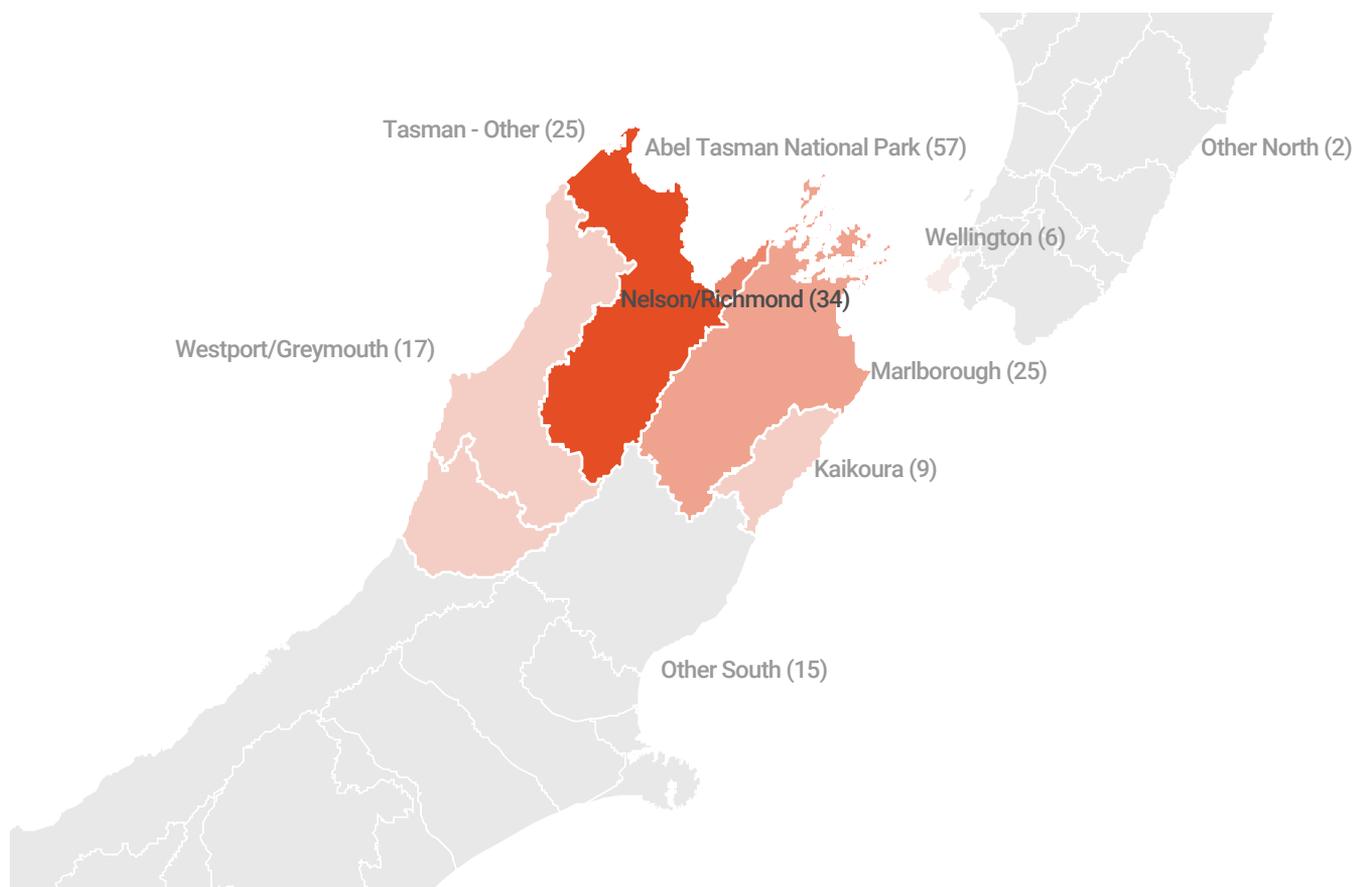
## Insights

87% of respondents discovered free camping locations provided by Nelson City Council through camping apps. The CamperMate App was by far the most popular with 80% of those who used camping apps finding the site they were at on CamperMate, compared to 10% on Wikicamps and 8% on Rankers.

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

12 respondents reported they found the site they were staying at in ways other than those listed above. Four saw it at the Nelson *i*Site, three knew about it from local knowledge, three found it by chance, one person had stayed before and one saw it on the Nelson City Council website.

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



## Insights

73% of respondents intended their next destination after Nelson to be within a 2-hour drive of Nelson city centre with 63% intending to stay within the Nelson-Tasman region.

18% of respondents intended staying in Nelson, Richmond, Tasman region. However, 35% of this group were Local Campers.

The most common destination after staying in Nelson was Abel Tasman National Park, with 30% of all respondents intending to travel there. This group were exclusively Working Holiday Tourers and Short Term International Visitors.

4.5% of respondents were unsure of their next destination after Nelson, with over half of this group Short Term International Travellers.

# Appendix A: Survey Questions

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

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

**What best describes your age group?**

Under 20

20 to 29

30 to 39

40 to 49

50 to 59

60 to 69

70 or older

Prefer not to say

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

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

Solo camper

Couple without children

Family with children

Extended family group

Friends

Couple plus friends

Other

**How long is your trip within New Zealand? How long are you travelling for in total**

Less than 1 week

1 to 2 weeks

2 weeks to one month

1 to 3 months

3 to 6 months

Longer than 6 months

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

**What is the purpose of your trip?**

Travelling (not working) throughout New Zealand

Travelling (not working) mainly in this region

Working in this region

Working holiday working in other regions

Living (not working) in this region

Other

**How are you travelling between camp site?**

Rented vehicle

Personal vehicle (privately owned)

Borrowed vehicle

Cycling

Other

**What are you camping or sleeping in?**

Car/SUV/Utility/Station wagon

Modified van/people mover

Purpose built campervan, caravan, motorhome, or house bus

Tent

Other

**What toilet facilities have you brought with you?**

None

Portable toilet stored in vehicle

Toilet in a separate cubicle

Built in toilet in the vehicle

**Have you used your own toilet facilities on this trip?**

Yes

No

Not applicable/no toilet facilities

**What dishwashing facilities have you brought with you?**

None

Portable basin or bucket (tip water out)

Fixed basin in vehicle with wastewater draining onto the ground

Fixed basin in vehicle with wastewater draining to holding tank

**What shower facilities do you have?**

None

Portable shower

Shower built into vehicle

**Does your vehicle have a current self-containment certificate**

A19.00

Yes

No

Not applicable (not camping in a vehicle)

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

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

Camping - free sites

Camping - paid sites

Backpackers

Motel/hotel

Short term rented accommodation e.g. Air BnB/Holiday house/BnB etc

Friends or family

Not travelling (i.e. at home)

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

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

A26.00

Yes

No

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

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

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

Fuel for your vehicle \$

Eating out and hospitality e.g. cafes, restaurants, bars \$

Accommodation/camping sites (excluding campervan hire), hotels, motels \$

Vehicle hire \$

Groceries \$

Activities/attractions (e.g. bungy jumping, jet boating, tours etc) \$

Services (repairs etc) \$

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

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

Much better than expected

Better than expected

About as expected

Worse than expected

Much worse than expected

Don't know/not applicable

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

Much better than expected

Better than expected

About as expected

Worse than expected

Much worse than expected

Don't know/not applicable

**What attracted you to this site?**

I heard this is a safe location

Nice views or scenery

Its a free site

This site is quiet

This site has good facilities

Activities close by e.g. swimming, MTB

Other

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

Toilets

Drinking water

Running water for washing

Refuse/waste bins

Recycling bins

Showers

Other

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

Nothing

Up to \$10 per person

\$10 to \$20 per person

Over \$20 per person

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

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

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

**How did you hear about this camp site?**

Social media

Camping apps

Friends or other travellers

Internet search

Printed brochures or maps

Other

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

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

If the next place you are travelling to is not listed, or you are not sure of your next destination, please provide more detail here: