

Camping in Central Otago



Revised – October 2010

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Executive Summary

Nationally, camping has been a significant issue over the last few months.

The New Zealand Freedom Camping Forum (the Forum) has recognised the public concerns about freedom camping and developed actions to address those concerns. Campervan hirers are now being told it is unacceptable to camp outside designated camping areas and users of vehicles without on board toilet facilities will be asked not to freedom camp. They will be directed to designated camping areas, such as holiday parks, DOC camp sites or other suitable locations with facilities.

The Forum considers the right to freedom camp is a New Zealand birthright and does not want to see it banned, but proposes action must be taken to protect our environment and our international reputation as a friendly and welcoming destination.

The Forum has brought together rental vehicle operators, the New Zealand Motor Caravan Association (NZMCA), local government and tourism organisations with the aim of improving the behaviour of campers. The Forum has agreed thirty actions to achieve this aim.

In Central Otago, camping in certain locations has been a popular pastime of some families for generations. Central Otago is a favourite destination for camping due to its great climate, lakes for water activities, and ease of access for people from Otago and Southland. The challenge at a local level is to develop a policy that reflects the varying demands for camping, and identifies where suitably it may occur in the area.

There are three types of demand identified for camping. The types are: campervans and motorhomes (self contained); campervans and motorhomes (not self contained); and tent and open air camping.

Locations where camping occurs also varies from serviced or commercial camping grounds, to limited service camps (i.e. those with just water and toilet facilities) to camping with no services.

Central Otago needs to cater for all types of camping. Ensuring services are available to meet the differing demands for camping, and that there are sufficient appropriate locations where camping may occur are both important. So there will be areas where camping can occur (or cannot occur), and information about these areas must be made available to the public, as must information about responsible behaviour regarding rubbish removal, waste disposal and fire safety.

The challenge for this strategy is to develop a co-ordinated approach to camping in Central Otago which will not only benefit those visiting here but will ensure that the local community is comfortable with the type of camping occurring and where it happens.

Camping

Currently there are three different types of camping in Central Otago, and the region is in the enviable position of being able to cater for a wide range of camping options. The Central Otago Tourism Strategy highlighted camping as a key activity which could be developed as a strong regional selling point.

Types of Camping

The three types of camping identified for Central Otago are:

Campervans and motorhomes – self contained

Vehicles that have approved self contained facilities can stay virtually anywhere for up to 3 days as per Council's policy on self contained camping. It is estimated only about 40% of campervans are self contained. The NZMCA has about 30,000 members nationwide and there are approved spots that are used by members. Often these are not formal camping grounds. Main needs are access to dump sites for waste disposal and to rubbish receptacles for litter. These do not have to be onsite. There is a growing demand as baby boomers sell or rent out their homes and take to the road in mobile homes. The strategic questions for this type are, are we satisfying current demand and what can we do to promote a more rewarding experience?

Campervans and motorhomes – not self contained

This type includes vehicles that do not have approved self contained toilets or waste units capable of meeting 3 days storage and also covers camping using cars, and non self contained caravans. These users require toilets and running water, and if they wish to stay more than one night they require access to washing facilities, rubbish disposal and power sources. While restricted due their need for toilet facilities etc they do seek some occasional limited service camping. Demand is expected to increase with both international and national domestic visitors increasingly using this form of travel. Ex rental vehicles are increasingly filtering down into domestic ownership, so allowing a wider range of visitor destinations.

Tent and open air camping

This category includes those domestic holiday makers who have come to Central Otago for many years. Popular sites include commercial camping grounds and more remote unserviced/limited service locations.

Locations Where This Camping Occurs

Camping – serviced or commercial camping grounds

Caravanning and tent camping in fully serviced facilities with – toilets, showers, kitchen, washing, power and rubbish. Traditional demand has been from the domestic market, for annual summer camping. More recently campervan and motorhomes have added to the mix of users. Lower international demand because of rising fuel costs is likely to be offset by a corresponding increase in domestic demand so that overall levels should remain steady, though extended holiday leave may increase demand slightly. The proximity to towns of some camping grounds and resultant high land values may threaten their retention.

Camping - with limited services (only basic toilet and running water – no power)

These locations host fewer caravans and more tenting, typically adjoining local rivers and waterways and some lakes and dams. Traditionally sites would feature a shared toilet (long drop) and access to water. Rubbish disposal generally follows the 'pack in pack out' code. Regulars often camp in large groups (friends, family and neighbours) and tend to frequent the same area/place over a number of years.

Camping – no services

Camping at any isolated location with no or very limited services for the experience of getting away from others. For some it is going to a secluded location that has some traditional significance. Regulars often camp in large groups (friends, family and neighbours) and tend to frequent the same area/place over a number of years. Camping may occur in some out of the way areas like remote river and stream margins. Remoteness and fewer well formed roads mean this type of camping is more often tent based though not exclusively so.

Overall - Current Situation

National

Recently there has been a lot of interest in camping within New Zealand leading to the creation of the Forum by the New Zealand Tourism Industry Association. The purpose of the Forum is to develop a national position on camping. Members of the Forum include Local Government, Regional Tourism, NZMCA, Campervan Companies, DOC, the New Zealand Holidays Parks Association and Tourism New Zealand. The Forum has developed a series of actions within the three sectors of campervan operators, local government and marketing agencies.

District

Currently there is confusion about the various types of campers, and about the issues relating to camping. Both nationally and in various media sources any form of camping including self contained vans or buses, non self contained vehicles and tenting has been generalised as freedom camping. Within this document we have attempted to recognise the different types of camping and the wider motivations and demands of campers who do not use fully serviced facilities.

The Central Otago District has capacity to absorb more camping across the spectrum, but to do so may aggravate concerns about litter, human waste and fire.

Litter is generally low key but like human waste is difficult to attribute to a particular visitor group as most of the favoured sites can be used by fishermen, picnickers, travellers and/or campers.

Fire is the other threat via camp fires but again it is difficult to apportion risk to a particular visitor group. Most call outs relate to extinguishing lake or riverside bonfires. Summer regional fire bans prohibit open fires, and require any smoke sightings to be phoned into the fire service.

Significant camping activity involves groups of temporary workers employed by orchards and vineyards e.g. camping at the Fraser Domain. Although this is a workers' accommodation and housing affordability issue workers' camping can displace other campers who would have a poorer holiday camping experience were they to stay co-located with groups of employees.

Dogs and firearms can cause issues that require management.

Central Otago's immediate neighbours have various policies on camping. A summary as at October 2010 is as follows:

Queenstown Lakes -

Welcome responsible campers who are prepared to look after our environment and follow some simple rules.

If your campervan is fully self contained (with a toilet, waste water and rubbish facilities on-board) then, unless signposted otherwise, you may camp overnight for free on public land away from the town centres and residential areas.

In return you must:

- *be away from the town centres and residential areas within the district.*
- *dispose of your waste water at one of the waste disposal dump stations and put your rubbish in bins provided within the town centres or at the Council transfer stations.*
- *Not light any fire.*
- *Leave the area as you found it, free of litter.*

Freedom camping in the town centres or residential areas (including parks and gardens) is not permitted and is likely to result in a parking infringement notice for which a fine is payable.

If you do not have a fully self contained campervan then you cannot freedom camp anywhere in the Lakes District and must stay in a camping ground if you wish to camp.

Camping Grounds and conservation campsites

There are many camping grounds within the lakes district including low cost camps with toilets and running water through to holiday parks with hot showers and cooking facilities. It is best to book these over the popular holiday periods.

Waitaki –

Waitaki administer a series of camping sites along the Waitaki River.

The Camping Season - The 3rd Saturday in September until the 1st Sunday in May.

Camp Site's Size - Size should not exceed 60m² (sufficient area to accommodate one car/utility, one boat, and either a tent or caravan). Many of the campsites have camp supervisors who collect the registration fees and ensure compliance with the rules of the camping area.

Registration - Registration must be paid on arrival. Tickets are non-refundable. Fees are applicable from when a site is claimed. Season and overnight tickets are available.

Clutha -

Freedom Camping - The Council has also adopted a Freedom Camping Policy which allows vehicles which have adequate on board facilities to enable them to stay for up to three nights on Council owned land without needing to use external facilities. It does not permit tents or vehicles without facilities to camp on Council land.

Dunedin City –

Dunedin is the perfect place for freedom campers to explore. We are working towards becoming a sustainable visitor destination, so we ask that visitors play their part in contributing to the area's well-being while enjoying our magnificent natural resources.

Specifically we ask all visitors to please:

- *Refrain from toileting on the ground and/or in the bush/forest.*
- *Discharge motorhome or campervan black water (sewage) and grey water (sink and hand basin water) at designated wastewater dump stations only.*
- *Place litter in rubbish receptacles.*
- *Refrain from using our waterways for bathing, washing clothes or dishes.*

Where can you camp?

Camping is permitted in designated camping grounds.

Camping is not permitted on reserves. (These are identified by reserve signs) Campers can compromise the use of reserves by others and impact on our environment. Please respect our reserves and help us to protect and sustain our plant and rare animal wildlife for everyone to enjoy, now and in the future.

Central Otago is a popular camping destination which is likely to remain so in the future. We have an opportunity to consider what types of camping we support and how best to manage the associated impacts while encouraging repeat visits.

As a result of public concern over declining areas for camping, the Minister of Conservation in January 2006 asked DOC to “review the availability of family-friendly camping opportunities for New Zealanders, particularly in coastal areas”. The report is intended as a catalyst for further discussion, laying out the issues and options associated with camping. It provides the basis for discussions with the camping industry, local communities and government that will identify appropriate and sustainable solutions which can be implemented at a local level. *DOC Review of camping opportunities in New Zealand (Report to the Minister of Conservation – September 2006) - **appendix one.***

Drawing from the DOC national review, regular campers with basic facility needs could account for over 67% of our campers. Of the remaining 23% at the other end of the camping spectrum 16% use a limited service camping ground (such as flushing toilet, running water, a cooking area that does have power). The remaining 7% opt to use fully serviced holiday parks. The remaining 10% use other types of campgrounds. (Mobius 2006)

Reviewing the benefits of camping displays some close correlations with our Central Otago brand values such as:

- Connection with and value of the landscape and environment
- Simple uncomplicated activity, no stress
- The camping experience - different to “normal” life
- Being able to spend quality time with family – socialising with fellow campers
- Instilling a different set of values – outdoors activities
- Not having it too easy – working a bit harder – cooking without too many home comforts, putting up a tent
- Sense of camaraderie and common purpose – camping community.

This is a valued and important kiwi tradition which New Zealanders want to see protected for current and future generations. Acknowledgement of the various types of camping and enhancing the district's acceptance of this kiwi tradition is important. Some research of Central Otago campers across the full camping spectrum would be of value. Research data would enable better focus on how the various

camping experiences can be sustained from the campers', local community and the environmental perspectives.

Better data could inform decisions about appropriate policy, guidelines and, where needed, supporting resources so as to sustain this great place to live work and play into the future.

Also how visitors and campers find out information about an area is changing significantly. No longer do travellers rely on just visiting an information centre. The internet and social media are changing the way information on popular camping areas is obtained (e.g. Facebook, Twitter, Trip Advisor and Lonely Planet). These media allow visitors to discuss popular camping areas and places. Any strategy and educational campaign must consider the public's use of these means, as well as traditional information provision, as ways of highlighting Central Otago's camping policy.

General Opportunities

We need to understand campers' motivations and needs across all types of camping and match the experiences we offer to those needs, while also managing related issues such as waste disposal.

Other district councils have shown that campers are prepared to cooperate with and help to fund control and mitigation of camping effects, while bringing significant economic benefit to the district. Issues to be considered include: areas for camping; space allocation; control of dogs; fire; barbeques; use of guns; and fees for camping.

At present there is a tendency to lump all the untoward effects of outdoor recreation on one group (e.g. camping as a whole) when several outdoor recreational user groups may be contributing. There are also examples where facilities have been provided for the community such as toilets, the installation of which has resulted in unanticipated change of use of the location by and for outdoor recreational activities.

While most camping occurs near bodies of water, such as rivers or lakes, it often occurs outside of designated managed camping areas. DOC has land statuses within its planning framework that allow camping. As potential camping sites are identified, and should these be on DOC administered land, liaison with DOC on the land status will influence whether the sites are developed for use.

Tenure review may create opportunities for camping in the future. However, many of these potential sites will tend to be more remote and cater for the more self-reliant type of visitor.

As camping grows in popularity there may be an opportunity to adopt a camping code for the district. Examples of existing codes are the DOC or national camping code. **(See appendix two and three)**

In order to manage limited service camping some long stay motor home users may be prepared to volunteer as honorary camp wardens to manage fee collection to fund temporary toilets and to organise rubbish collection at nominated sites.

So collaborative work with stakeholders is in prospect to establish sites that are distributed across the District, supported by signage, user registration and a code of conduct. There might be a suitable temporary management system to accommodate seasonal peak demand with passes or fees which would help fund the chosen regime. Integrated with this, seasonal camp rangers/contractors could monitor compliance, impart visitor information and collect fees.

Another possible approach would follow the Australian model where during high use times racecourses and domains are used for camping purposes so long as they have appropriate facilities.

An opportunity also identified was to provide extra services in some specified areas. For example where an area may be designated for camping with toilets provided, placing sinks on the outside of the toilets for people to wash and do their dishes might be advantageous provided vandalism could be minimised.

General Threats/Risks

Increased petrol prices may make domestic holidaymakers consider options closer to home. Rising aviation fuel prices may make international travel less appealing but this reduction may be countered by domestic travellers looking for cheaper holiday options.

Other authorities might enforce no camping on land they control, or enforce legislation which prohibits camping along the Clutha River margins outside of marginal strip.

As land values increase there may be increased demand to subdivide camping grounds on private land for other uses. This will decrease the amount of land and number of areas providing fully serviced camping.

Dump stations not being appropriate for the numbers using them or not in convenient locations.

If camping opportunities and issues relating to camping are not clearly defined there could be several issues which become prominent:

- People's positive experience of camping is reduced due to overcrowding; or
- There is a shortage of camping areas due to increasing demand
- Adverse environmental effects increase through poor disposal of waste and accidental fire risk especially during dry conditions, or cutting or removing vegetation which spoils camping areas
- Social management issues such as dealing with dogs, guns, speed of vehicles and trail bikes and allocation of camping space
- Access to quality drinking water
- Access to an appropriate number of toilets
- Displacement of other outdoor recreation activities such as picnicking or swimming
- Poor management of rubbish – it was identified that a clear policy on rubbish is required. This includes encouraging people to take away what rubbish they produce (no trace camping) and clearly identifying locations where rubbish can be disposed of e.g. recycling locations and approved places to dispose of remaining rubbish
- Road Access to popular camping areas
- Poor signage – currently signage identifying toilets, waste disposal areas and rubbish disposal areas has been noted by the public as being a concern. More campers will mean proportionately more people will be unable to find these facilities

If numbers of campers and the intensity of camping were to grow then impact monitoring and management would be required.

There is little information on the cost/benefit balance to the community of the various forms of camping. So there is no clear information on whether the costs associated with rubbish collection, waste disposal and enforcement to the community are outweighed by the value campers provide to a community through buying goods and services.

A concern expressed in the consultation has been the need to keep lakeshore and marginal strip areas free for the general public to enjoy. Recreational users may find it intimidating to use areas where people are camping. This can result in potential conflict over use of popular recreation areas such as boat ramps, ski lanes, launching areas and picnic spots. The suggested solution to this has been to indicate designated camping areas.

Positioning

Central Otago should position itself as one of the major camping destinations for the South Island

What matters for these users?

- Areas are available for camping
- Areas are safe and quiet
- Scenic views
- Areas are clean
- Water is available
- Facilities and terrain are appropriate for the type of camping undertaken

Recommended Actions:

- **Review Central Otago's independent camping policy and develop a camping policy covering all the demands identified**
- **Collaborate with other agencies**
- **Adopt and actively promote a 'no trace camping' code with good communication of sites where this can occur**
- **Review signage associated with camping to include sites for camping, toilets signage and signage for waste disposal points**
- **Review dump stations in the district and develop additional facilities if required**
- **Develop a brochure outlining the types of camping and the locations they can occur for "paper" publication and posting on the internet**
- **Clearly define the appropriate areas around Lake Dunstan and elsewhere which are suitable to meet individual camping demands**
- **Develop a research programme for camping**
- **Develop a communication strategy for camping**
- **Liaise with the National Camping Forum**

Types of Camping

Campervans, caravans and Motorhomes – Self Contained

This includes vehicles that have approved self contained facilities and can stay anywhere for up to 3 days.

Current Situation

Self contained campervans and motorhomes are catered for specifically through commercial camping grounds, the provision of dump stations throughout the district, Council's current policy on independent overnight camping which allows stays of up to three days in one site, and several privately operated NZMCA sites. There are separate pop sites (park over properties/places – these are camp areas for motorhomes) that are managed by NZMCA members. Only members use these pop sites.

Because of their size some motor homes are unsuitable for some of the local roads (off the main highways) due to road width and bridge weight limitations. Manoeuvring and parking in some of our smaller visitor sites is restrictive, such as at St Bathans, Naseby and Bannockburn.

Self contained campervan and motorhome use is an increasingly discussed phenomenon in the community and Central Otago is increasingly seen as a great destination. An example of this was the NZMCA "Gold in Valley" rally held in Cromwell at Easter 2008. This saw an estimated 950 caravans in attendance. The average number of people per caravan was two and 63% of attendees came from the North Island. The average length of stay in Central Otago was 15 days. Average spend per person was \$39 per day which, though quite low, led over the total length of stay to expenditure of about \$568 per person. The event resulted in approximately \$1.2 million in direct and indirect spending and created 14 full time equivalent jobs in the area over the period.

Dump stations are currently provided at the Alexandra Holiday Park, Stadium Tavern Alexandra, Alexandra Caltex Service Station, Chalets Accommodation and Holiday Park Cromwell, Ranfurly Charlemont Street East and Teviot Street in Roxburgh.

A list of current locations which are used by campervans and motorhomes is **attached** in appendix four.

Opportunities

For self contained motorhomes there may be merit in providing self guided routes tailored to vehicle size. This would avoid the activity occurring in inappropriate locations, with the associated poor experience.

Encourage certification of self contained vehicles through agencies such as the NCMCA and companies that hire campervans.

User pays for some designated sites for self contained vehicles was suggested to help cover the cost of basic services such as cleaning of toilets, rubbish collection and monitoring for non compliance.

Threats/Risks

The scale and size of the district can cater for reasonable numbers of motor homes, but capacity, congestion and road safety problems can arise if numbers gather and travel in groups.

The current dump station set up appears to be coping with demand. If demand continues to increase then issues may arise with more of the larger motor homes (buses) accessing some sites.

What matters for these users?

- Areas are available for camping
- Areas are safe and quiet
- Scenic views
- Areas are clean

- Areas are flat
- Dump stations and rubbish disposal is available, but not necessarily on site

Recommended Actions:

- **Continually assess the need for dump stations as demand for this type of camping grows**
- **Develop self guided information for this market**
- **Work alongside the NZMCA to identify further locations for their members to camp in the district (for self contained and non self contained)**
- **Work with appropriate groups to explore the development of potential sites identified**
- **Discussion with the St Bathans community regarding management of the self contained market**
- **Discussion with LINZ regarding camping requirements at Lake Dunstan**
- **There are appropriate camping sites at the following:**
 - **Camper Van/Buses – Self contained**
 - **St Bathans Domain**
 - **Fraser Domain**
 - **Lake Dunstan – LINZ sites – Bendigo, John Bull Ck, Jacksons**
 - **Pinders pond**
 - **Lindis River - Ardgour**
 - **Tarras Domain**
 - **Goodger Flat Reserve – Lindis River**
 - **Wedderburn Domain**
 - **Patearoa School Reserve (to be developed)**
 - **Waipiata Domain**

Campervans, caravans and Motorhomes – Not Self Contained

This category includes vehicles that do not have approved self contained units capable of meeting 3 days storage and also covers camping using cars, and non self contained caravans. These users require toilets and running water.

Current Situation

There are separate pop (park over properties/places) sites. These are camp areas for motorhomes that are managed by NZMCA members. Only members use these sites.

Rental motor homes that do visit the district are not catered for specifically outside of commercial camping grounds. However these visitors do often stop at scenic spots to camp rather than use formal camping facilities.

A list of current locations which are used by campervans and motorhomes – not self contained is attached in **appendix five**.

Threats/Risks

As free independents with varied degrees of self containment, waste is a concern if disposed of outside of camping areas with toilets. Appropriate toileting systems are needed to protect our environment and ensure other visitors and community members are not faced with unpleasant and unhealthy situations.

LINZ does not permit overnight camping around Lake Dunstan including at those recreation areas with permanent toilets. But these are popular sites from which the smaller motorhomes can explore Central Otago, are clearly visible and much desired as use is high and frequent. Other agencies have different rules about camping and there is a need to standardize the official stance throughout the district.

What matters for these users?

- Areas are available for camping
- Areas are safe and quiet
- Scenic views
- Areas are clean
- Areas are flat
- There is clean water
- Toilets are available

Recommended Actions:

- **Work with appropriate groups to explore the development of potential of sites for non self contained campervans.**
- **Consider camping sites at the following:**
 - **Camper Van/Buses – *Not Self contained***
 - **St Bathans Domain**
 - **Fraser Domain**
 - **German Creek – Danseys Pass**
 - **Lake Dunstan – LINZ sites – Bendigo,**
 - **Pinders pond**
 - **Lindis River – Ardgour**
 - **Tarras Domain**
 - **Goodger Flat Reserve – Lindis River**
 - **Wedderburn Domain**
 - **Patearoa School (to be developed)**
 - **Waipiata Domain**



Tent and Open Air Camping

This category includes those domestic holiday makers who have come to Central Otago for many years. Popular sites include commercial camping grounds and more remote unserviced/limited service locations.

The more remote locations would generally be unsuitable for campervans and motorhomes, whether self contained or not, many being accessible only to 4WD vehicles, mountain bikes, or on foot or horseback.

Current Situation

Domestic Holiday makers generally camp over the summer months due to school holidays and better weather. It is a predominantly family market. This type of camping occurs in all three location categories in the following section. Actual locations are set out on pages 14, 16 and 18/19.

Opportunities

One of the distinct advantages of Central Otago is an ideal climate for tent and open air camping over the summer time. There are many suitable camping areas, from serviced camping grounds to places beside waterways or other picturesque spots.

Many families have camped in this way for generations, are frequent visitors to our district, and have preferred spots that they go to over the summer holidays time and time again.

Threats

Should this type of camping be prohibited this would have a big detrimental affect on the attractiveness and marketability of camping in Central Otago, particularly among the family sector.

What matters for these users?

- Areas are available for camping
- Areas are safe and quiet
- Scenic views
- Areas are clean
- Areas are relatively flat
- There is access to clean water

Recommended Actions:

- **That this type of camping be allowed to continue at various areas throughout the Central Otago district.**
- **Campers be encouraged to have their own waste disposal methods and camp near an appropriate and safe water source.**

Locations Where Camping Occurs:

Camping – Serviced Camping Grounds

Camping grounds provide a full range of facilities, including serviced toilets, showers, kitchen, washing, power, rubbish collection, cabins, tenting areas and sites for caravans and motorhomes.

Current Situation

Serviced camping grounds fill a large part of the camping market. There continues to be an adequate number of camping grounds spread throughout the district, but there is concern is that if any were lost, through real estate pressures for example, this would displace visitors to other areas. To the end of December 2008 camping grounds and holiday parks accounted for 13% of the domestic visitor nights spent in Central Otago (approx 66,000 visitor nights).

Recent campground surveys in Cromwell and Naseby were carried out by the Central Otago District Council to gather data about the market.

Key findings of the Cromwell Top 10 Holiday Park survey:

A total of 99 surveys were returned representing 358 people.

- Overall there were 6131 visitors who stayed at the camp over the December 2008 – January 2009.
- The largest number of campers came from Otago (35%), Southland (29%) and Canterbury (15%). Over 80% of visitors came from the South Island.
- Typical length of stay was between 3 and 8 days.
- Word of mouth was the common way of finding out about the campground.
- Two thirds had booked their stay at least 6 months in advance.
- The top ten popular activities while here were boating, eating out, mountain biking, walking, fishing, shopping, swimming, wine tasting and golf.
- Average spend per day was about \$34 per day.
- Visitors to the campground added nearly \$1 million to the local economy.

Key finds of the Larch View Holiday Park Naseby survey:

A total of 72 surveys were returned representing 244 people.

- It is estimated that 5,000 people stayed at the camp over December 2008 and January 2009.
- The largest number of campers came from Canterbury (32%), Otago (25%) and Central Otago (10%). 75% of visitors came from the South Island.
- Length of stay was approximately 3 days.
- Word of mouth was the method for finding out about the camp.
- Only one third of visitors booked more than 3 months in advance.
- Most popular activities were mountain biking, walking, swimming, eating out and curling.
- Average spend was about \$25 per day.
- Visitors to the campground added over \$650,000 to the local economy over the December-January period.
-

For Central Otago to position itself as a favoured camping destination then it must meet the long term needs of these visitors. There are economic and social benefits for the community in having camping grounds and providing spots for visitors to stay in.

Commercial capacity is sufficient but the closure of Roxburgh and Cairnmuir commercial camps has reduced capacity. Over time further closures such as these could result in a supply shortage.

Commercial camping grounds meet the needs of campers ranging from self contained and non self contained through to those who are tenting but want some home comforts and services still available.

Opportunities

Camping grounds in the area are on a mix of private land, where there are risks for the future as land values rise, and public land held as recreation reserves with correspondingly greater security. See the demand analysis which has the land status of each camping ground.

The changes to and rationalisation of camping grounds in Queenstown, Wanaka and Arrowtown open opportunities for Central Otago to host displaced visitors.

There is an opportunity to improve the visibility and signage of camping grounds in the local area.

Threats/Risks

The increasing price of land is putting financial pressure on camping grounds under freehold title, especially those adjoining local urban centres. Camping grounds near towns are good for campers because of easy access to other activities the visitors may wish to enjoy, but this very proximity also makes them desirable for development as residential or retail spaces.

There may also be reverse sensitivity where residential developments approved around camp grounds lead to objections from new residents to camping continuing in their neighbourhood.

Current and future use:

Camping : Serviced camping grounds	International – anyone from overseas		National Domestic – visitors from rest of NZ		Local Domestic CO and Otago holidaymakers		
	Now-	Future –	now	future	now	future	
							Suggested ideas and product improvement.
Alexandra Holiday Park (public -leased)	y	y	y	y	y	y	
Alexandra Tourist Park (public - leased)	y	y	y	y	y	y	
Top 10 Cromwell Holiday Park (private)	y	y	y	y	y	y	
Cromwell Chalets (private)	y	y	y	y	y	y	
Bannockburn Recreational Reserve (public)	y	y	y	y	y	y	
Millers Flat Holiday Park (private)	y	y	y	y	y	y	
Ettrick Park Camping Ground (private)	y	y	y	y	y	y	
Clyde Holiday and Sporting Complex (public)	y	y	y	y	y	y	
Ranfurly Motor Camp (private)	y	y	y	y	y	y	

Omakau Domain Camping Ground (public)	y	y	y	y	y	y	
Larchview Holiday Park Naseby (public)	y	y	y	y	y	y	
Patearoa School (public)		y		y		y	Currently under discussion for development
Cairnmuir Campground (private)			y	y	y	y	

(public and private) - shows the land status of the camping ground.

What matters for these users?

- Areas are friendly and clean
- Areas are value for money
- And with good accessibility

Recommended Actions:

- **Carry out research on the value of this type of camping activity to the local community.**
- **Consider developing camping sites at the following:**
 - **Camping – Serviced Camping Grounds**
 - **Patearoa School Reserve**

Camping - With Limited Services

This type of camping typically occurs near rivers, waterways, lakes, or dams. Limited services may be a shared long drop and access to water. Rubbish is removed by the camper – the ‘pack in pack out’ rubbish code.

Current Situation

These visitors tend to be more regular, camping several times a year, as opposed to other types of camping who most often stay at serviced camping grounds for a once a year experience. Much limited service and/or freedom camping occurs around Lake Dunstan, at various rest areas and river margin areas as well as traditional locations such as the Lindis River.. Some of these places are on private property or access river margins through private land usually at the discretion of the landowner.

While not quantifiable much occurs during high summer with families holidaying in the area, seasonal workers in the area, and short term visitors passing through, often on overnight stays.

While there are numerous areas throughout the district where this type of camping could occur, the constraining factor in some is the lack of toilets.

The demand for camping with limited services appears steady with the younger generation actively participating in this type of camping.

Some conflicts occur over use of vegetation, lighting fires, control of dogs, and use of guns, each of which requires appropriate management case by case.

Opportunities

There are a range of sites that could be developed to meet this market (as identified in the demand analysis on the previous page).

Develop a set of guidelines regarding limited service camping and provide a more active management regime to control and mitigate issues of waste, fire, use of vegetation, controlling dogs and use of firearms.

Threats/Risks

Increasing breaches of water quality, as recorded on ORC recreational water quality monitoring web site, may make camping areas undesirable or unhealthy.

Incidences of poor waste management and/or vegetation fires increase unacceptability with the Central Otago public. Poor control of dogs, inappropriate use of fire arms and damage to vegetation may also be long term issues.

Reduced access to camping areas, especially those on private land, due to changes in tenure or heightened concerns with the risk of fire or control of waste.

Current and future use:

Camping: With limited services. Potable water; toilets, no power;	International – anyone from overseas		National Domestic – visitors from rest of NZ		Local Domestic CO and Otago holidaymakers		
	Now- currently happening	Future – good place to develop activity	now	future	now	future	
							Suggested ideas and product improvement.
St Bathans Domain	y	y	y	y	y	y	Recreation Reserve, Toilet. Limited ability to cater for in St Bathans due to narrow street and limited parking for large vehicles. Need to remain at the domain.
Fraser Domain	y	y	y	y	y	y	Recreation Reserve, Toilet.
Danseys Pass Recreation Reserve					y	y	Recreation Reserve, Toilet. Narrow gravel road.
Lake Dunstan		y		y		y	LINZ Toilets. Allowed where there are toilets?
Lindis River - - Lindis Hotel		y		y	y	y	Historic Reserve. Narrow access. Toilet onsite.
State Highway Reserve Goodger Flat adjoins Lindis River.	y	y	y	y	y	y	Road Reserve. Requires toilets. Currently well used.
Homestead – Oteake Conservation Park		y		y	y	y	Self registration camp site. Oteake Conservation Park. Gravel Road with fords.
Pinders pond		y		y	y	y	Stewardship Land. Over night, no long stay.

Roxburgh		y		y		y	Development potential.
Fraser Domain	y	y	y	y	y	y	Toilet, water provided.
Bannockburn Recreation Reserve	y	y	y	y	y	y	Toilet, water provided.
Wedderburn Domain			y	y	y	y	Potential development.
Waipiata Recreation Reserve		y		y	y	y	Potential development.
Tarras Domain		y		y		y	Potential development.
Wedderburn Domain		y		y		y	Potential development.

What matters for these users?

- Areas are safe and clean
- Areas are value for money or free of charge
- There are level sites for tents
- With good accessibility – either on foot or by vehicle
- “Pack in Pack out” or basic services for rubbish disposal
- Toilet available
- Access to clean water

Recommended Actions:

- **Develop a set of guidelines regarding limited service camping**
- **Secure sites and access to areas suitable for limited services camping**
- **Explore potential funding options for water and toilet systems at these sites.**
- **Consider camping sites at the following:**
 - **Camping – With Limited Services**
 - **Nevis Valley – various sites – Conservation land and marginal strip**
 - **Conroys Dam – Conservation land**
 - **German Creek – Conservation land**
 - **Lake Dunstan – LINZ Toilet sites areas Bendigo,**
 - **Clutha River – Lindis Crossing and Maori Point**
 - **Goodger Flat Reserve – Lindis River**
 - **Lindis Hotel Historic Reserve Old Faithful Road**
 - **Manuherikia River – Marginal Strip – Galloway, Olig, Chatto Creek, Omakau, St Bathans Loop Road**
 - **Baumont Gorge – Clutha River sites**
 - **Pinders pond**
 - **Lindis River - Ardgour**
 - **Tarras Domain**
 - **Wedderburn Domain**
 - **Patearoa School Reserve**
 - **Waipiata Domain**

Camping - No Services

Camping at any isolated location, with no services, for the outdoor wilderness experience of getting away from others.

Current Situation

Significant amounts of unserviced camping occur on LINZ and/or DOC administered marginal strip land around the lakes and in river margins. New conservation areas coming out of tenure reviews, such as in the Nevis Valley and headwaters of the Manuherikia are providing more potential for remote camping. DOC actively supports camping on public conservation land.

Demand is hard to quantify because these campers are discrete, their sites are widely distributed across the district, and they leave little trace. One consequence of promoting/increasing camping in general could be displacement as those wishing to retain their wilderness experience move site to remain remote.

Generally being sensitive to their surroundings and environment they are conscious of and compliant with the environmental care code.

Fire is a big risk especially in those more remote sites with good fire fuel sources, especially during dry summer conditions. Having a fire is only appropriate at locations where there are appropriate facilities, and fires are not permitted when there is a closed fire season.

Opportunities

Identify new areas for camping as a result of tenure review or land purchases.

Threats/Risks

Reduced summer water flows in rivers which affect the camping and swimming experience.

Popularity alters the quality of some current wilderness experiences in Central Otago.

Current and future use:

Camping : No services Access to open water and sometimes long drop toilets	International – anyone from overseas		National Domestic – visitors from rest of NZ		Local Domestic CO and Otago holidaymakers		Suggested ideas and product improvement.
	now	future	now	future	now	future	
Lindis River - Ardgour					y	Y	Marginal Strip.
Nevis Valley Adjoining Marginal Strip and Conservation Areas		y	y	y	y	Y	Various – Marginal Strip and Pastoral Lease.
Conroy's Dam		y	y	y	y	Y	Marginal Strip. Toilet required. Narrow access. Water.

Hawksburn Creek					y	Y	Marginal Strip.
Teviot River				y		Y	
Clutha River – Lindis Crossing/Maori Point		y		y	y	Y	Marginal Strip.
Taieri River					y	Y	Marginal Strip.
Manuherikia River - Galloway, Olig, Chatto Ck, Omakau, St Bathans loop road,			y	y	y	Y	Marginal Strip and private land. Marginal Strip and private land. Small campers only. Toilet system required
Upper Manuherikia – Old Homestead Michael Peaks		y		y	y	Y	Self registration camp site. Oteake Conservation Park. Gravel Road with fords.
Beaumont Millennium tk - Clutha River							Marginal Strip and Road Reserve, Contact Land. Toilets required.
Onslow							Original lake; Pioneer Generation; Central Electric; Beaumont Station.
Waikerikeri					y	Y	Marginal Strip and Conservation Area.
Poolburn Dam				y		Y	Irrigation Reserve.
Kyeburn River					y	Y	Marginal Strip. Toilet system required.
Upper Manorburn					y	Y	Irrigation Reserve. Narrow gravel road. Toilet system required.
Sections of Otago Central Rail Trail	y	y	y	y			Bike or walking only. Toilets and water.
Upper Manuherikia			y	y	y	Y	Marginal Strip.

What matters for these users?

- Isolation and local beauty - few or no other people, space, quiet, shelter and clean
- Source of water preferable

Recommended Actions:

- **Do not actively market camping with no services**

Appendix One

Review of Camping Opportunities – Department of Conservation.

Review of camping opportunities in New Zealand

Report to the Minister of conservation – September 2006

As a result of public concern over declining areas for camping, the Minister of Conservation in January 2006 asked the Department of Conservation (DOC) to “review the availability of family-friendly camping opportunities for New Zealanders, particularly in coastal areas”. The report is intended as a catalyst for further discussion, laying out the issues and options around providing camping opportunities. It provides the basis for discussions with the camping industry, local communities and government that will identify appropriate and sustainable solutions which can be implemented at a local level.

The whole document is available at:

<http://www.beehive.govt.nz/sites/all/files/DoC%20Camping%20Review%20Sep%2006.pdf>

Drawing from this review there are number of sections and graphs which give context to opportunities and issues for camping in Central Otago.

Clearly from observation of current practice Central Otago hosts and is a very popular destination for ‘regular campers’ with basic facility needs (no power, long drop with access to water) a significant number being (site specific loyalist) returning to the same camping area year after year.

Drawing from the attached review, regular campers with basic facility needs could account for over 67% of our campers. Of the remaining 23% at the other end of the camping spectrum 16% use a limited service camping ground (such as flushing toilet , running water, a cooking area that does have power). With the remaining 7% opting for the fully serviced holiday park.

Review of the benefits of camping displays some close correlations with our central Otago brand values such as

- connection and value of the landscape and environment
- simple un complicated activity, no stress
- The camping experience - different to “normal” life
- Being able to spend quality with family – socialising with fellow campers -
- Instilling a different set of values – more to life than TV & play stations
- Not having it to easy – working a bit harder – cooking without too many home comforts, putting up a tent
- Sense of camaraderie and common purpose – camping community

It terms of sustaining this valued and important kiwi tradition which New Zealanders want to see protected for current and future generations. Some research of Central Otago campers across the full camping spectrum would be of value in terms of identifying who, when, what and why. With research into how the various camping experiences can be sustained both from the campers, local community and the environments perspectives.

With this information, informed decisions with appropriate policy, guidelines and supporting resources and structure if deemed required can be implemented to sustain this great place to live work and play into the future.

The importance of camping to New Zealanders

Market research carried out as part of the review shows that the vast majority of New Zealanders (91%) consider access to places to go camping to be either “extremely important” (60%) or “important” (31%) (Mobius, 2006).

Even people who have never been camping and never intend to do so, share the perspective that this is something that is important to New Zealanders and should be protected so that future generations are able to have similar experiences.

Camping is described as a right to be enjoyed by all, similar to perceptions about access to and use of national parks and the coastal environment. Participants in the focus groups were almost unanimous in the view that that camping is “part of the kiwi way of life”; an activity that epitomises what it means to be a New Zealander and helps to define who we are and the values that we stand for.

By necessity, camping involves a back-to-basics approach that enables people to experience and appreciate the environment, their families and the people around them in a way that they cannot do in their normal busy day-to-day lives. This is a highly valued attribute, with many focus group participants underlining the importance of “being able to relax and get away from it all”, something more important today than ever before (Mobius, 2006).

Access to camping areas is seen as an indicator of New Zealanders’ ability to access the coast, a key heritage right. There is a common view that: “If I can still go camping in these places then there is probably not too much to be concerned about”. This suggests that the public views camping areas, even those in private ownership, to be land that is generally accessible to them and therefore no different to public land. With this in mind, the closure of iconic camping areas and their subsequent development for other land uses, has highlighted coastal development issues generally.

Market research indicates 62% of New Zealanders are “concerned” or “extremely concerned” about recent camping area closures.

A detailed discussion of this topic is contained in appendix 1 of the full report.

Demand for camping

Most of New Zealanders (80%) have been camping at some point in their life. Fifty-seven per cent have an interest in going camping, and 37% of the population considers themselves to be “regular campers” (people who have been camping at some point in the in the last few years and intend to go camping at some point in the foreseeable future).

When compared against figures from Sport and Recreation New Zealand’s (SPARC) Participation Survey, the percentage of the population who have been camping in the last 12 months (13%) is similar to the percentage who have played tennis, or who have been tramping, cycling, running or jogging over the past year (SPARC, Participation – NZ Adults, 2006).

The number of people camping means 9% of total domestic guest nights are accommodated in camping areas, a figure that has been stable over the past five years. This trend is at odds with popular opinion and media articles arising from recent campground closures which suggest that camping is less relevant to contemporary New Zealanders and demand for camping is reducing.

The domestic travel market is predicted to grow by 1.0% a year over the next 5 years. This growth is underpinned by the increase, from 2007, in the statutory minimum annual leave entitlement. In addition, market research indicates that most (80%) of regular campers are likely to camp about the same amount or more often in the future, confirming that overall demand for camping amongst New Zealanders remains strong.

Whilst it is commonly assumed that a large proportion of camping occurs in the upper North Island, the actual figure is still surprising - more than 90% of New Zealand campers have indicated that they use places in the upper North Island (Mobius, 2006). This is likely to be the result of a range of factors, including the proportion of the New Zealand population living close to these regions, favourable climate, suitable locations next to water and the large number of already established camping areas.

The Southern Lakes area in Otago is the most popular region for camping in the South Island attracting a substantial proportion of all campers who live in the South Island.

Camping is predominately a summer activity in New Zealand, for obvious reasons. Camping in good weather is easier, more comfortable and more enjoyable for all involved (Mobius, 2006). It is also the time of the year when children are on holiday and parents are more likely to get extended time off work, thanks to statutory holidays and many businesses closing down for the Christmas / New Year period. New Zealand also has a relatively short summer. The combined effect of these factors is that a significant number of camping areas in preferred holiday regions are at or close to capacity for up to 14 days during the period between Boxing Day and early January. A change to this pattern is unlikely. Consequently, this period of peak demand is likely to continue and will have to be managed.

The Nature of the Problem

Summary

The most significant issue is that current demand exceeds supply in a number of specific locations over the peak summer holiday period. This is due to the closure of commercial holiday parks and camping grounds over the past few years, and has driven the public perception that the supply of camping areas has decreased dramatically in recent times.

The second most significant issue is the potential for future camping area closures and in a greater number of regions throughout New Zealand. The factors underlying recent changes are expected to continue into the foreseeable future.

Fewer camping areas

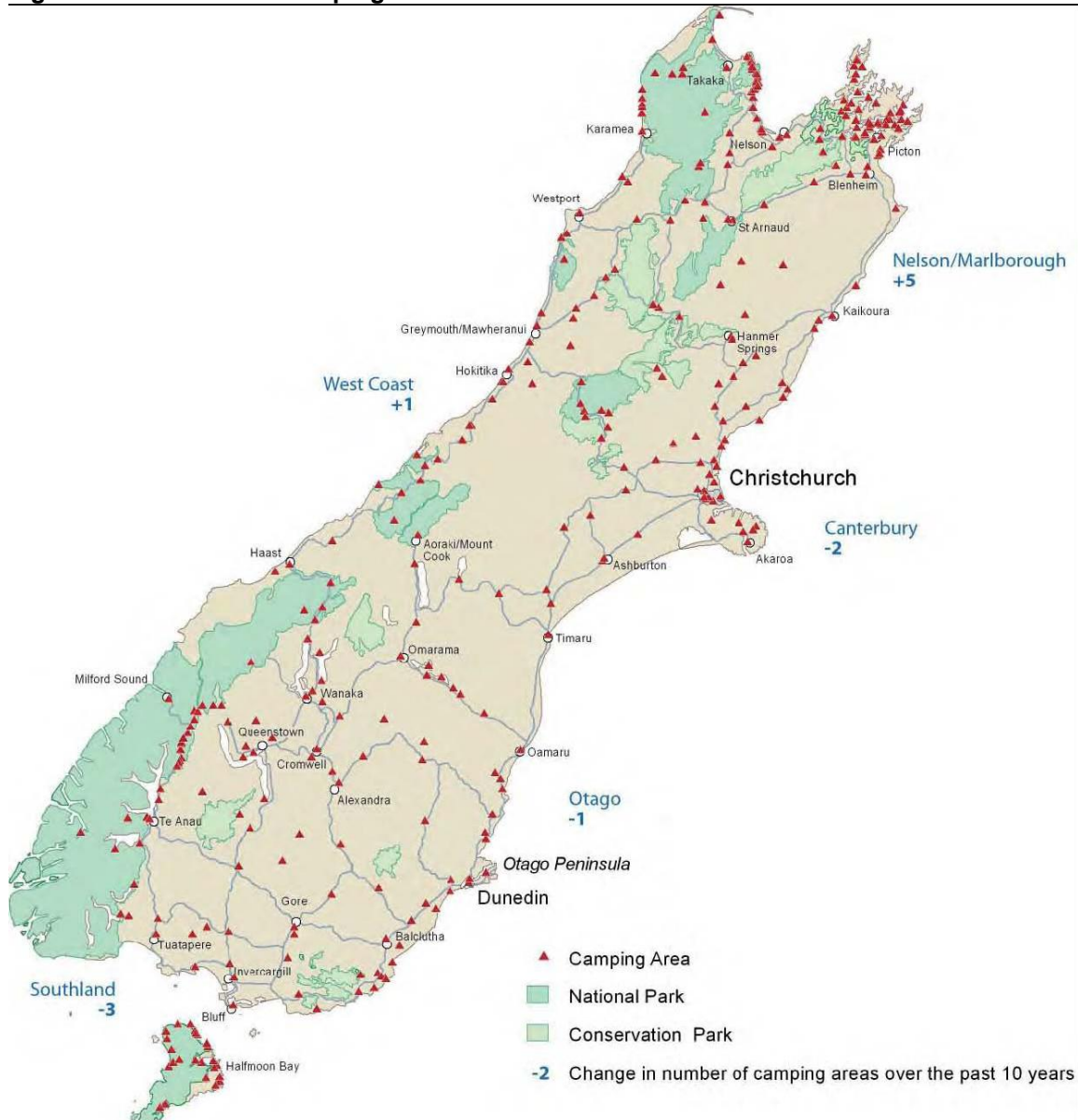
Just over 1000 camping areas are currently managed nationwide (excluding areas where people freedom camp). Almost half are commercial holiday parks – a mixture of privately-managed parks on freehold land; privately-managed parks on public land and local authority owned and managed parks. The remaining camping areas provide only rudimentary facilities to support basic camping experiences. Most are managed by DOC, but Auckland Regional Council and a number of district councils (Waitaki District Council and Gisborne District Council are notable examples), manage a significant number in specific localities.

The distribution of these camping areas for the South island is shown below.

Over the past 10 years, there has been a 6% net reduction in the number of camping opportunities available – today there are around 70 fewer camping areas than in 1996. Most of this change has occurred since 2001, with the period 1996-2001, showing little, if any, change. The reduction in the number of places to camp is clearly a recent event and against the previous trend of stability within the sector.

Most of the reduction is in commercial campgrounds on privately-owned freehold land. There has been very little change in the number of camping opportunities on public land over the past decade.

Figure 1 South Island - camping area distribution



Reference – DoC Review of camping opportunities in New Zealand 2006

The Influence of land values

Recent and substantial increases in land values, particularly in prime scenic and / or holiday locations are likely to have accelerated the demise of many camping areas on freehold land and inhibited the development of new ones. The properties’ high commercial value results from their physical location on the water’s edge in popular holiday locations, and because they are relatively easy and profitable to redevelop – many are large flat properties with good road access and services, and relatively free of infrastructure. Owners may be able to make more money by selling the property and investing the return elsewhere, than by continuing to operate the site as a camping area.

Similar pressure is anticipated to continue into the foreseeable future, with more localities likely to be affected over time. Commercial pressures do not have the same influence on operators of camping areas on publicly-owned land because they only own the right to operate a camping area and not the right to sell the property. Further, because they do not have to buy the land in the first instance, they are able to minimise the upfront capital costs of their business, which influences the level of return required for the

business to be a viable and worthwhile investment. As a result, camping areas on public land are more likely to persist into the future than those on private freehold land.

Commercial viability

The increase in land value is not the sole driver of these changes. Business viability and performance of individual camping areas varies widely, with many performing extremely well, but some only generating enough income to cover day-to-day basic maintenance and running costs but not the renewal and replacement of infrastructure. The cost of new or replacement infrastructure may also have led to the sale and closure of some camping areas, especially those in locations not serviced by local authority infrastructure. These have to provide their own water supply to the required standard, treat and dispose of all wastewater generated from the property and collect and dispose of all rubbish and recyclable material. They are not able to enjoy the benefits of economies of scale that businesses based in urban or peri-urban locations can access via the local authority.

In addition, the physical location of many of these camping areas next to water and in scenic areas with high natural values, makes infrastructure maintenance or renewal more difficult and costly due to a reliance on technical solutions. The high values generally associated with these locations may also create complications in obtaining the necessary resource consent approvals to operate in such an environment.

Another issue raised is the formula used by local authorities to calculate rates charges, largely based upon the unimproved value of the land occupied. A detailed discussion of changes in the supply of camping opportunities is contained in appendix 3 of the full report.

Why should the Government be involved?

Ensuring the long-term survival of camping opportunities in New Zealand falls largely to the organisations and individuals involved in the camping industry, but there is also a role for central and local government to help make sure prime locations remain part of the mix.

Public support for government involvement was tested as part of the market research conducted during the course of the review. Three questions were asked. Almost two thirds of all respondents “disagree” or “strongly disagree” that there is no need to replace camping areas that had closed. A similar number (61%) support local or central government playing a role in ensuring the current supply of camping areas in New Zealand remain open. Only 16% of the population “disagree” or “strongly disagree” with this position.

The reasons given are surprisingly consistent – campers and non-campers alike hold the view that camping is a right for all New Zealanders, and is a key part of the New Zealand way of life. This was expressed in the focus groups as a desire for: –

- Maintained access to camping and continued availability of camping areas – both now and for future generations.
- Camping to be affordable for all New Zealanders. If camping areas become fewer in number, demand for access to these places will increase, along with the cost and camping may become a pastime only for available to those who can afford it.
- Availability and affordability being protected through subsidies (if and as necessary). This included at a cost to the wider public, including the non-camping public, via rates, taxes or the loss of other services. Camping is perceived as a mixed private / public good which should receive significant public sector support. (Mobius, 2006)

There is also strong support for protecting prime camping areas currently in private ownership that may not be available for camping in the future. This includes protection at a financial cost to the wider public. The main reason given is that it ensures ongoing access to prime land (and especially coastal land) for the wider public, and in particular for people who are economically disadvantaged.

There is no single solution to address the current and future demand for camping areas, deal with the reduction in the number of camping areas, and / or manage demand at the peak time of year. The most effective way to retain the current range and distribution of camping opportunities is to consider a suite of

potential solutions covering a range of options. This approach minimises the risk of any one adopted solution being unsuccessful and increases the likelihood that the identified issues will be addressed. It is also likely to achieve greater buy-in across the sector.

The best outcome is therefore based on encouraging and sustaining diversity – of operators, types of camping areas and geographic locations. Diversity will lead to a more resilient and robust sector as no one issue will be able to undermine the entire camping sector, better ensuring its long term viability. This diversity will also better meet the needs of campers, as all campers are not alike.

A range of solutions are suggested in this section as a basis for further discussion by the camping industry, communities and local government.

It is important to note, before any potential solutions are discussed, that all camping facilities need be managed properly to ensure that the quality of the experience for the camper does not suffer. Poorly managed camping areas do not meet the needs and expectations of campers and have the potential to detrimentally affect New Zealand's reputation in key international tourist markets. All of these following options should only be pursued where it is clear that a quality camping experience can be sustained.

Do nothing different

This option provides a useful beginning point to examine what could happen if nothing substantially different is done.

Continued increases in land values, and people seeking affordable locations to buy holiday homes, will most likely continue to drive the closure and re-development of camping areas on private freehold land. The effect of this trend is likely to be felt in an increasing number of regions in both the North and South islands.

However, despite continued increases in land values, private operators are likely to continue to establish new camping areas in response to demand pressures, but these are likely to be in less desirable locations from the campers' perspective, away from waterfront and scenic locations.

DOC has already signalled its intention (through the Recreation Opportunities Review process concluded in 2004) to continue to manage a similar number of camping areas, and local government has given no indication it intends to substantially change what is currently provided. Likewise, Auckland Regional Council has recently reviewed their role in the provision of camping areas and remains committed to the management of their existing areas.

Recent experience on the Coromandel Peninsula illustrates the logical end state of these trends. Over the past 10 years, there has been a 30% reduction in the total camping capacity of this locality. A noticeable reduction of camping capacity in other popular holiday locations can therefore reasonably be anticipated over time if current conditions prevail.

Such a significant reduction in opportunity is not considered to be in the interest of New Zealand campers, and not meet their aspirations as expressed through responses provided to the market research.

Better use of existing public land

Capacity issues are largely confined to the peak summer holiday period, particularly between Boxing Day and the end of the first week in January. At other times of the year there is, almost always, sufficient capacity in most locations to accommodate those who want to go camping.

Because the need covers such a short period it makes no sense for anyone, public or private, to develop permanent infrastructure, at significant cost, to meet it. An obvious option is to encourage better use of existing public land and infrastructure. The following are some examples of how and where this could be achieved.

The priority for developing any of the following options should be areas where current demand pressure is significant and unable to be met by existing facilities or where significant growth potential has been identified.

Expand existing camping areas onto adjacent land over the peak season

The Arrowtown Motor Camp, on recreation reserve administered by the Queenstown Lakes District Council, provides a useful example of what can be achieved.

One half of the reserve is used as a sports ground by the local rugby club. Over the summer period, when the demand for camping is high and the need for rugby sports grounds is low, the camp will be allowed to operate over the entire site, using the sports ground's ablution facilities. The campground manager becomes responsible for maintaining the entire reserve and its associated facilities over this period to ensure that no additional costs accrue to the council. The result is better use of the reserve and its associated infrastructure in a manner that remains entirely consistent with the recreation purpose for which the reserve is held.

This opportunity could equally apply to adjacent private land where a camping area is able to secure an agreement with the adjacent landowner to access some land for a set period. If proven successful it is possible that such arrangements could become permanent with camping areas able to occupy adjacent land each year over the peak camping period.

Camping on sports fields over the peak season

Many sports fields are not well used over the summer period. Those located in rural areas or adjacent to small communities may provide suitable locations for camping over the peak holiday period. These sites are suitable as they have good road access, a flat area to camp on and often have associated ablution facilities. They could easily be operated by existing local camping area operators in conjunction with their existing operation, local authorities or the local community itself.

If used to accommodate camping for specific periods, consideration needs to be given to:

- Any existing use that may be compromised if camping is allowed over the peak summer holiday period.
- Whether or not this location is a suitable and desirable place to camp from the perspective of the camper.
- Whether or not camping can be properly managed at that location and any negative effects minimised.

Camping on open space reserves over the peak season

Areas of reserve land around the country currently managed as day use / picnic areas or for open space recreation could also be managed to meet the needs of campers over the peak holiday period. This is particularly the case where key infrastructure (toilets and a water supply) is already present, or where temporary facilities can be practically provided.

As an example, Gisborne District Council (GDC) operates a very effective system on the foreshore reserves it manages. Over the summer period, GDC supplements the existing on-site facilities by installing and maintaining very basic temporary infrastructure which enables campers to use and enjoy these reserves. Campers buy a pass before going camping, and the revenue offsets the costs of providing and servicing the additional infrastructure. At the end of the summer holiday period all temporary facilities are removed. This is a cost-effective way of increasing peak camping capacity within a local area.

If used to accommodate camping for specific periods, consideration needs to be given to:

- Any existing use that may be compromised if camping is allowed over the peak summer holiday period.
- Whether or not this location is a suitable and desirable place to camp from the perspective of the camper.

- Whether or not camping can be properly managed at that location and any negative effects minimised.

Rural schools in suitable locations

Using rural schools in suitable locations offers opportunities to supplement existing camping capacity where there is demonstrated demand but no justification to develop new land and the facilities to support camping. Some rural schools have the potential to be used as camping areas in locations where existing facilities are booked out and at capacity. These schools are not being used at this time of the year and already have the necessary infrastructure to facilitate camping – a flat area to camp on, a water supply and toilet facilities.

This option is likely to be most successful if pursued in partnership with an experienced camping area manager.

Create new camping areas

On their own, the solutions involving better use of existing public land are unlikely to sufficiently compensate for the number of closed camping areas. New camping areas are also needed as part of the mix to meet the current level of demand for such opportunities and offset the impact of recent closures.

It is important that any additional opportunities are located to meet the needs of campers who have been displaced by recent closures and that they also provide the correct level of facilities and services expected by these campers. This means additional camping areas should be in regions where New Zealanders want to go camping and where there has already been a noticeable decrease in camping opportunity and capacity

Developing private land

Despite the issues previously discussed in the report it is a given that privately owned camping areas will continue to be developed on private land. In 2005, 11 new private camping areas were developed and this is expected to continue in response to market forces and clear demand.

There is a risk in relying solely on such investment because private investors primarily seek to maximise the return on their investment, with the needs and expectations of the camper of secondary importance to the profitability of the business. A possible outcome is that new camping areas developed to fill gaps caused by the closure of others will not be located on prime coastal space as this would be cost-prohibitive to develop. Therefore, over time, the quality of the camping experience may diminish.

There is also often a time lag between a camping area closing and the development of a new one to fill the gap. This can be more than one or two years. In the meantime, the camper is displaced or forced to give up camping altogether.

Developing public conservation land

While DOC manages around one third of New Zealand's total land area, very few have similar characteristics to the camping areas which have closed in recent years.*

Notwithstanding this, as part of this review, DOC undertook a nationwide survey to identify all locations on public conservation land that would, if developed, make great camping areas. The criteria used assessed the site's overall camping potential, including how close it is to water, other activities available or potentially available nearby, and the known impediments to its development as a camping area. Consideration was also given to its distance from the nearest community, existing infrastructure connections, and any existing use of the site.

This survey identified 30 potential new sites within the priority regions of Auckland, Coromandel, Bay of Plenty, Central North Island and East Coast / Hawkes Bay. These sites have not been formally analysed to confirm that camping areas can be practically and legally established, but their identification suggests that real opportunities for new camping areas do exist on public conservation land.

Potential camping areas have also been identified in non-priority regions, but the Department believes there is insufficient justification to develop them at this point in time. Should factors change in the future these sites may be also considered for development as camping areas.

Developing other public land

Most public land close to urban areas is managed by city and district councils for the benefit of their local communities. Local authorities could carry out an exercise similar to DOC's.. Auckland Regional Council has already expressed an interest in working with DOC to do this.

If such an analysis is completed nationwide, it will enable a complete assessment to be made of the camping potential of public land throughout New Zealand and help make sure that the optimal sites are selected for development.

Government purchase of iconic camping areas

In some circumstances, the opportunity may exist to use public funds to buy iconic camping areas whose future is threatened, to secure them in public ownership. Such investments would be strategic and in the public interest to allow future generations to continue to camp in these iconic locations.

This option is suggested as part of the mix because it is unreasonable to put planning controls on such properties to try to make sure private owners continue to manage them as camping areas.

At present, no fund exists that can be relied upon for such purchases.

Review the Camping Grounds Regulations 1985

The Camping-Grounds Regulations 1985 specify the minimum standard of facilities and services to be provided at a camping area and all camping areas are required to comply. The regulations are considered to be very important by commercial camping area managers. The industry perceives significant risks if the regulations are revoked and not replaced.

However, despite their importance, the regulations do not create a level playing field for people managing camping areas. This option therefore suggests that they be reviewed to create parity.

The issue arises under the section 14 (3) of the regulations which says: "A local authority may grant the operator of a remote camp site a certificate of exemption from such requirements of these regulations as it specifies in that certificate". The intent of this provision is a sensible one and reflects the fact that because not all camping areas provide the same camping experience, there is no need for a 'one size fits all' approach. It provides a mechanism to exempt certain requirements where these are clearly impractical to implement, or where they are inconsistent with the needs and expectations of campers at that location.

However, this provision can only be applied to "remote camp sites". Within the regulations, this is defined as a camping ground in a national park, state forest, state forest park, or public reserve, or on Crown land (Camping-Grounds Regulations, 1985). Any camping area not located on a public reserve or other Crown land is unable to be managed to meet the needs of campers wanting only basic facilities.

It does not seem reasonable that a Crown agency or local authority is able to legally operate a remote camping area with minimal facilities, while someone managing the adjacent property and wishing to do the same is unable to do so. This is despite the fact that both sites contain the same facilities and present similar potential risks to any campers.

Consequently, DOC supports a review of these regulations to ensure that any individual or organisation is able to manage any remote camping area. It is anticipated that such a change will support and encourage the development of camping areas at the basic end of the camping spectrum by a variety of people and organisations, including farmers, marae committees and forestry companies. The intention in seeking a review is not to lessen the standard, but to ensure that the minimum standards are appropriate and can be applied to all remote camping areas, irrespective of who manages them.

The Ministry of Health has no plans to review these regulations in the foreseeable future. In addition, a review of these regulations is not supported by the industry as they are seen as a valuable tool to maintain the standard of services and facilities at camping areas nationally. Some current operators believe that because existing operators have had to meet these requirements, at significant cost, they should continue to represent the minimum level of entry for any new operator.

Grow the market

An obvious strategy to ensure the future success and stability of the sector is to grow the market to achieve its full potential by increasing the number of people who go camping. Focussing on the growth potential provides an incentive for all camping area managers to work together, and may drive additional investment in new and enlarged camping areas.

Market research indicates that nearly 20% of the New Zealand public are not campers but are interested in the activity (Mobius, 2006). This means the potential domestic market is at least 50% bigger than its current size. The challenge is to turn this level of interest into people going camping.

Because it appears that these latent or potential campers have very similar expectations and preferences to people who regularly camp, the sector should be able to meet the former group's needs and expectations without any additional cost or inconvenience.

Attracting could-be campers

Latent campers fall into two distinct groups. The first contains people who have been camping in the past and remain interested, but for one reason or another have not recently been camping. This group amounts to 15% of the total population (Mobius, 2006). The second group are those who have never been camping (almost 5% of the population), but are interested.

For the first group, the most common reason given for not continuing to camp is being too busy (Mobius, 2006). This may be partly addressed by the Government's initiative to increase the minimum holiday leave entitlement from three to four weeks from 2007, which should result in an increase in bed nights spent in camping areas. In addition, the recent decision to extend the summer school holiday period by one week into early February may also increase the time available for New Zealand families to go camping. Anecdotal evidence from camp managers suggests that this had a positive effect over the past summer, with many families camping for longer periods to take advantage of the better weather at the end of January.

Another barrier identified by just over 8% of latent campers relates to the cost of the equipment needed to go camping. Compared to many other holiday activities, camping can require a lot of equipment. The up-front cost of this equipment may not be able to be afforded by lower income New Zealand families.

The second group of latent campers who make up almost 5% of the total population (Mobius, 2006), are people who have never been camping before but are interested. The main reasons given for not camping are largely similar to those discussed above, with one major addition – around 20% note a lack of knowledge or awareness as the main reason for not having camped before. For some people in the focus groups, this lack of awareness has developed into a fear of the unknown which holds them back. This is a significant issue as people are more likely to choose another activity if they do not have ready access to the necessary information.

The most common gap in knowledge is where camping is allowed, followed by uncertainty about the cost and a general uncertainty about where to access relevant information. This lack of basic knowledge and awareness was also a significant finding in a recent study of camping on Auckland's Regional Parks (ARC, 2005). It highlights that current efforts to brand, advertise and promote camping areas is not effective at reaching all parts of the target market and something different needs to be done.

The internet is by far the most frequently mentioned source that campers refer to when looking for information about camping in New Zealand (Mobius, 2006). Awareness of all other sources of information is much lower. However, internet-based information about camping in New Zealand is split over a

multitude of websites managed by a range of different agencies and businesses, which means there is no easy way for the latent camper to find out about where camping is available. One relatively simple option to improve this is to create an internet portal (one single website) referencing all available information. From the campers' perspective this would provide a one-stop-shop and significantly improve their ability to access relevant information.

Encouraging people to choose camping

During focus groups, a number of the participants said they were not encouraged to think about camping holidays in the same way they were for other types of holidays and destinations. For example, New Zealanders are being sold the concept of an overseas holiday, but not the traditional Kiwi summer camping holiday. Focus groups participants thought it important that some attempt be made to convince New Zealanders to go camping within our shores.

Sector-wide agreement and involvement will help achieve this. However, the sheer number of operators means the camping sector is currently fragmented. Marketing groups, such as the "Top 10 Holiday Parks", have done a great deal with their available resources, but lack the scale and resources necessary to effectively influence the holiday behaviour of New Zealanders on their own. A co-ordinated sector-wide marketing approach needs to be developed in conjunction with industry players. The focus of this strategy should be simple; to get New Zealanders to think about going camping and, as a result, get more people camping.

Build camping into the school curriculum

Focus groups suggested that more families would go camping if parents were sure their children were interested in the activity. A simple way to develop this interest is to ensure schools include camping activities as part of their Learning Outside of the Classroom activities.

The health and physical education curriculum is currently under review by the Ministry of Education and this provides an opportunity for the issue to be discussed and for camping to be included in the revised curriculum guidance. The Department of Conservation will advocate for camping activities to be included as part of these programmes.

Supporting first time campers

Focus groups with non-campers highlighted the high levels of uncertainty for people who are interested in camping but have never done it. They therefore lack basic information and skills, such as how to set up a tent. To harness these people's interest in camping and turn it into action, opportunities need to be provided where they can learn about camping in a non-threatening and supportive setting.

One suggestion is "learn to camp" weekends. These could be held at selected camping areas nationally, outside of the peak camping periods, and could be run in a manner similar to a trade fair, with the latest gear provided by camping equipment suppliers and manufacturers, and opportunities provided for people to learn how to assemble the equipment correctly. Other camping-related information would be provided, and novice campers could be given the opportunity to spend a night with their family on-site in a tent that they have assembled.

Camping as part of the Kiwi Culture

Camping as a form of outdoor recreation has evolved from its original association with hunting and gathering type activities. Back then, the term described an outdoors activity that hinged on accommodation in a tent or similar rudimentary shelter, and self sufficiency. You needed the skills to source your own water and food, and make a fire to cook on, as often there was no one else to rely on for your survival.

Over time the camping concept has evolved and changed in line with changes in New Zealand society. Camping today is quite different to 50 years ago. But despite this it can be described in a similar way – it remains an outdoor activity where self sufficient people are accommodated in a rudimentary shelter. The main difference is that the terms "rudimentary shelter" and "self sufficient" mean quite different things in today's context.

From the modern campers' perspective, a rudimentary shelter can be a much wider variety of accommodation types, most of which would have not been considered to be rudimentary by past standards. While it can still describe a very basic shelter made of locally-sourced material, this is no longer the norm. Today many people accommodate themselves in tents of myriad colours, sizes and designs, while others stay in caravans, motor homes, campervans or house buses. Even small relocatable buildings or permanent on-site caravans are becoming commonplace in some locations. Importantly, people staying in all of these forms of accommodation still consider themselves to be camping.

The term self-sufficient also means something quite different in today's context. While, at a basic level, it still means to look after yourself, this ranges from the hunter gatherer to simply having easy access to somewhere to buy a takeaway meal. For most campers it is somewhere in between, where campers take food with them and prepare and cook it using the equipment they have bought with them.

Although the equipment, skill levels and experience may have changed quite dramatically over the past 50 years, it is clear from market research (Mobius, 2006) that campers believe the experience of camping remains largely the same and they obtain similar benefits. The activity of camping has evolved to meet the diverse needs and expectations of contemporary New Zealanders.

The benefits of camping

The market research results show that camping is an important activity that New Zealanders value and want to see protected for current and future generations. This view most likely arises from the benefits, real or perceived, that accrue when people go camping.

Until the market research, it was unclear what benefits New Zealanders derived from camping, or these were different from the benefits offered by other activities. The information presented below results from this work.

From the campers' perspective, the benefits arising from camping can be grouped together as follows: -

- Social relationships
- The environment
- The activity - simple, uncomplicated, no stress
- The experience - different to "normal" life

People in focus groups of regular campers consistently identified the same benefits. For them, camping is predominantly about:

- Being able to get outside and back to a simpler, less complicated way of life.
- Being able to spend quality time with family – doing things they don't have the chance to do at other times of the year.
- Socialising with friends and other campers – the camping experience, for most people was very much a social experience. Regular campers spoke about
- The camaraderie and sense of common purpose they felt with, and among other campers.
- Feeling as if you belong to a community – being able to see the same people every year and getting to know them a bit better each time was viewed extremely positively, particularly for campers who return to the same site.
- Not having it too easy – for many regular campers, camping is about having to work a little bit harder but feeling a stronger degree of satisfaction about their achievements. For example, having to put a tent up to provide their own accommodation, and cook a meal without too many home comforts. One comment is that "the food just tastes so much better when it takes longer to get it all together".
- Time out and down time, particularly from an urban lifestyle. Camping is about slowing down, not worrying about what's happening around you and forgetting about the stress of a normal urban lifestyle.

- Safe and healthy fun for children, and instilling a different set of values – for many regular campers, the activity is about educating children that there’s much more to life than play-stations and television.
- Appreciating the environment (plants and animals) – again this was considered to be an extremely important part of camping with children.
- Affordable holidaying – most regular campers agreed that camping is still an affordable holiday option for a family who might otherwise not be able to take a break (Mobius, 2006).

Results from the wider survey of New Zealanders identified very similar benefits which are summarised in the following table.

IDENTIFIED BENEFITS OF CAMPING – NEW ZEALAND REGULAR CAMPERS AND LATENT CAMPERS 2006.

MAIN BENEFITS OF CAMPING	% OF RESPONDENTS (MULTI-RESPONSE)
Chance to get outside / enjoy the outdoors	67.3
Spend time with family	65.8
Relax / unwind	44.8
Spend time with friends	28.1
Healthy lifestyle / way of life	21.7
Enjoy the scenery	20.2
No stress	15.3
Simple way of life	8.4
Creates a sense of community / community among campers	6.2
It’s a challenge	2.8
Fun	1.1

(Mobius, 2006)

The most commonly identified benefit of camping is that it provides an opportunity to get outside and enjoy the outdoors. More than two thirds of campers and latent campers surveyed identified this benefit (Mobius, 2006). Whilst this is not something unique to camping, it does highlight that campers have a particular affinity for the physical environment that they choose to go camping in.

Equally as significant is that more than two thirds of all surveyed campers also identified that camping enabled them to spend quality time with their family (Mobius, 2006). Many other outdoor activities do not provide a similar opportunity.

It is this unique combination of benefits that ensures camping continues to be valued by New Zealanders.

Private and public benefits

Camping is widely perceived to deliver both benefits to the individual and to society in general. Virtually all focus group participants identified a mixed private / public good. This included those people who had never been camping and never intended to do so. Examples of the public good benefits identified included: –

- Reduced healthcare costs.
- Increased environmental awareness and appreciation.
- Happy, well functioning families.
- Money spent in local communities rather than overseas.

Frustrations and annoyances

Some negative things about camping were identified by the market research. It is important to understand these in order to address them and enhance the overall value of the camping experience.

Information gleaned about frustrations and annoyances is illustrated in table 5.

Just over 25% of campers did not identify any negative aspects for the activity.

LESS POSITIVE ASPECTS OF CAMPING – NEW ZEALAND REGULAR CAMPERS AND LATENT CAMPERS.

LESS POSITIVE ASPECTS OF CAMPING	% OF RESPONDENTS (MULTI-RESPONSE)
Nothing at all	25.9
The weather	23.5
Crowded campgrounds	20.1
Insects / bugs	15.8
Not enough campgrounds available	9.8
Noisy / annoying other campers	9.7
The cost of camping – e.g. the campground	4.5
The cost – e.g. of camping equipment	4.4
The basic ness of it i.e. hard ground, cold showers	3.4
Cleanliness / hygiene standards / pollution / litter	2.7
Difficulty in booking a campground	2.2
Getting there i.e. long drive, packing, getting lost	0.9

(Mobius, 2006)

Some members of the focus groups also identified theft as an issue. This was not detected in the national survey, indicating that it is unlikely to be a significant problem at this point in time. It is, however, a very real issue for those who have been the victims of such acts.

A number of the less positive aspects identified are either very difficult or impossible to resolve. These include the New Zealand climate, insects and the problems associated with other campers.

Others are potentially possible to resolve, including capacity (crowding, not enough campgrounds and difficulty in booking), cost and the standard of facilities and services. These should be addressed by all those in the camping industry.

Level of public concern

Media reports related to campground closures over the past few years are one indicator of the level of public interest and concern with respect to this issue. Media interest in the closure of camping areas has appeared to have increased over recent years and is consistently at its most intense over the summer holiday period. This is understandable as it is the time of the year when any closures over the course of the past year actually impact on the plans and actions of people who want to holiday in these places.

In an attempt to quantify the actual level of concern amongst the New Zealand public, the following question was asked: “Do you have any concerns about the future of camping in New Zealand?”. More than 60% of respondents noted that they were. Further, when asked to describe what it was that they were concerned about, more than 80% of responses cited the closure, selling off and development of existing campgrounds as the reason for their concern (Mobius, 2006).

Sixty-two per cent of people described themselves as “concerned” or “extremely concerned” about recent camping area closures. Conversely, 13% of respondents were “not concerned” or “not at all concerned” about these closures (Mobius, 2006).

The key reasons for being “concerned” or “extremely concerned” are: –

- It reduces the opportunity to camp and makes it more difficult for people and families to camp and relax.
- Because camping is a way of life in New Zealand.
- Because people will miss out on enjoying and experiencing the outdoors (Mobius, 2006).

Domestic travel trends generally

Domestic overnight trips fluctuated around 20 million a year between 1999 and 2002, before falling to around 18.4 million by 2004. The recent decline in overnight trips has mainly been caused by a large increase in outbound travel over the same period.

Of the overnight trips, about 40% of these are holidays, the single largest category. A further 30% can be attributed to visiting friends and relatives, and 22% are business-related.

In 2005, the number of overnight trips was forecast to decrease further to 18.1 million (actual information is not yet available for the 2005 calendar year), before gradually recovering to 19.8 million by 2011. This represents a growth of 1.0% a year from current levels and is underpinned by the one-week increase in the statutory minimum annual leave entitlement from 2007.

This information indicates that the domestic travel market will not decrease over the foreseeable future. The challenge for camping area managers remains to convince people to go camping during these holidays.

Who goes camping?

While it is clear there will be a similar sized domestic travel market in the foreseeable future, it is important to ascertain what the level of demand for camping will be in future, and whether it will be sufficient to sustain a viable sector.

Market research undertaken as part of this review indicates that most (80%) of the New Zealand population have been camping at some point in their life. This high level of exposure to camping may help explain why camping is considered to be part of the Kiwi way of life, and something that defines what it means to be a New Zealander. This was a consistent theme in the focus groups.

Significantly, the same research also highlights that 57% of New Zealanders have an interest in going camping, and 37% of the population considers themselves to be ‘regular campers’ (people who have been camping at some point in the in the last few years and intend to go camping at some point in the foreseeable future). Consequently more than one third of all New Zealanders currently go camping.

In New Zealand, camping was traditionally seen as holiday recreation for the working class family with a large number of children and a low household income (Nolan, 1975). Today, this statement is not an accurate representation. People from all “walks of life”, from urban and rural areas, and with a wide range of household incomes can be seen enjoying this form of recreation. Recent research backs this up. It illustrates that no one part of New Zealand society seems more or less likely to go camping, indicating that the activity appeals to a broad cross section of the New Zealand public (Mobius, 2006).

Interestingly; –

- Males and females are just as likely to go camping.
- People from all age groups actively engage in camping.
- People living in a family situation (a household with more than three people) are slightly more likely to be campers than those living a smaller household.

- More than half of the regular campers have a household income (before tax) exceeding \$50,000.

Thirteen per cent of New Zealanders identified that they have been camping in the last 12 months. This is a significant proportion of the population and is similar to the percentage of the population who have played tennis, or have been tramping, cycling or running / jogging over the past year (SPARC, Participation – NZ Adults).

The effect of all these people camping is that 9% of total domestic guest nights are shown to be accommodated in Caravan Parks (Domestic Travel Survey). In this context, the category Caravan Park includes all camping areas except those managed by DOC and those informal areas used by freedom campers.

When do New Zealanders go camping?

It should not be a surprise to anyone that, in New Zealand, camping is predominately a summer activity. The reasons for this pattern are easy to discern. It is summer and camping in good weather is easier, more comfortable and more enjoyable for all involved (Mobius, 2006). It is also a time of the year when children are away from school (school holidays) and parents are more likely to be able to get extended time off work. This is because of the number of statutory holidays and the fact that many businesses do not operate over this same period. This combination of factors leads to the summer period being the most desirable time for New Zealanders, and in particular New Zealand families, to go camping.

The market research information confirms this pattern. It indicates that the majority of campers are most likely to go camping in the summer school holidays (between Christmas and the end of January each year). Approximately half of all regular campers surveyed recorded this response. A further 38% of regular campers cited the Christmas / New Year period as the time that they were most likely to be camping (Mobius, 2006).

It is obvious that those camping over the summer school holidays are camping at the same time as those over the Christmas / New Year period (90% of all regular campers prefer camping at this time). The effect of this is a very pronounced “peak” of camping activity over this two week period. This pattern also describes the New Zealand summer holiday generally.

The reality is that New Zealand has a relatively short summer and people will take advantage of the additional opportunity afforded by statutory holidays to get out and enjoy themselves with their family and friends. Consequently, this period of peak demand is something is likely to continue into the future and will have to be managed.

Those people camping during the summer school holiday period are more likely to be those living in a family situation with one or more children. This period, more than any other throughout the year, is the time when families have the opportunity to go on holiday together.

This is also the time of the year that longer camping trips tend to take place. The factors that influence this are the same as those that have already been outlined above (time, and weather). More than half of the regular campers surveyed camp for one to two weeks at a time. A further 14% indicated that they camped for more than two weeks at a time (Mobius, 2006). This information is enlightening. Although it was commonly known that a proportion of New Zealanders spent significant periods of time camping, the large number of campers participating in this “extended camping” is a surprise. These people invest the majority of their annual holidays in camping each year. Few other activities could claim a similar level of commitment amongst such a wide cross section of New Zealand society.

Shorter camping trips (for example, weekend and long weekend breaks) tend to occur throughout the year, but are still more likely to occur over the warmer and more settled summer months (Mobius, 2006).

So campers engage in both short and longer camping trips but how often do New Zealanders go camping? Of those regular campers who have camped in the last 12 months, just over half have camped either once or twice (52%). This means that the remaining 48% have camped three times or more in the

last 12 months. Once again this number of repeat activities indicates a high level of commitment and enthusiasm for the activity of camping. Camping is more than simply something to do to fill in your holidays.

Where do people camp?

It is useful to identify those regions where New Zealanders currently go camping as this can then be compared with the current provision of camping areas to see to ascertain if the current supply is likely to meet the needs and wants of contemporary campers.

Of course responses given to the question will, at least in part, reflect the current supply. This is because as you can only go camping where there are suitable maintained areas to camp. To this extent you would not expect any region with a small supply of camping areas to feature prominently as a region often camped at by New Zealanders.

The table below summarises the regions identified by New Zealand campers from most popular to least popular.

TABLE 7: REGIONS NEW ZEALANDERS CAMP AT – NEW ZEALAND REGULAR CAMPERS 2006.

AREAS / REGIONS	% OF REGULAR CAMPERS (MULTI-RESPONSE)
Auckland / Coromandel	26.2
Northland	23.6
Waikato / Bay of Plenty	15.8
Rotorua / Central Plateau	14.5
Southern Lakes / Otago	12.8
East Coast / Hawke's Bay	11.8
Southland	8.8
Nelson / Marlborough	7.7
Wairarapa / Kapiti-Horowhenua / Wellington	6.4
West Coast South Island	6.4
Canterbury	6.1
Taranaki / Manawatu / Wanganui	3.7
North Island (variety of regions)	0.3
South Island (variety of regions)	2.7
Nationwide (variety of regions)	5.1
Other	4.4

(Mobius, 2006)

Whilst it is commonly assumed that a large proportion of camping occurs in the upper North Island it was surprising that more than 90% of New Zealand campers identified regions in the upper North Island as locations where they go camping. This is likely to be the result of a range of factors including the proportion of the New Zealand population living close to these regions, favorable climate, and suitable locations adjacent to the sea, and a large number of already established camping areas.

The Southern Lakes area in Central Otago is clearly the most popular region for camping in the South Island and no doubt attracts a substantial proportion of all campers who live in the South Island.

Standard of facilities and services required by New Zealand campers

We have ascertained where, in a general sense, New Zealanders go camping but what type of camping areas do people camp at? Do more New Zealanders prefer basic camping areas with only rudimentary

facilities or is there a preference for those camping areas with more highly facilities like those found at many Holiday Parks?

There was no existing information available to answer this question so once again information used to answer this question has been drawn from the market research undertaken in conjunction with this review. This information establishes that a reasonable level of demand exists amongst New Zealand campers for both basic and higher standard camping areas.

Two thirds (67%) of New Zealand regular campers camp most often at camping areas that do not have electricity. 56% of these people camp most often at areas with only very basic facilities such as a long drop toilet and with access to water.

At the other end of the spectrum, 23% of New Zealand campers most often stay at those camping areas with electricity, running water and flush toilets. But less than one-third of these campers (7%) choose to camp at those areas with top of the line holiday park type facilities. This is a very surprising finding. There are a large number of camping areas providing this standard of facilities and services in New Zealand. The majority seem to be in demand so where is this demand coming from?. If not New Zealanders is it international visitors staying at these higher standard camping areas?

TABLE 8: TYPE OF CAMPING AREA MOST FREQUENTLY CAMPED AT BY NEW ZEALAND CAMPERS

TYPE OF CAMPING AREA	% OF REGULAR CAMPERS
Basic campground with some facilities such as a long drop and access to water	37.7
A campground with facilities such as flushing toilets, running water, a cooking area BUT no power	29.0
Total Unpowered	66.7
A campground with facilities such as flushing toilets, running water, a cooking area, that DOES have power	16.2
A holiday park that has all facilities including an entertainment area, cooking facilities, hot showers etc.	7.1
Total Powered	23.3
Depends on time of year/needs/wants	4.7
Other type of campground	5.4
Total Depends/Other	10.1

(Mobius, 2006)

Discussion in the focus groups continually highlighted the fact that many New Zealanders see camping as a back to basics activity so these results are not entirely surprising. Many people value the opportunity to do something that is different to the way that they live in their day to day lives. Basic camping provides them with such an opportunity.

Those Regular Campers aged less than 35 years were more likely than those in older age groups to camp at a camping area with some basic facilities but no power (44% for those aged less than 35 years compared with 29% for those aged 35 years and over). Significantly this indicates that this is not a dying trend in New Zealand. Rather it is one that is being driven by the younger generations and consequently there is likely to continue to be significant level of demand for basic camping into the future.

Interestingly there was no association between presence of children in the household and campground preference. It was previously assumed by many in the camping industry that campers with young children were more likely to go to camping areas with a higher standard of facilities and services. This does not appear to be the case.

New Zealand campers' choice in the type of camping areas is also influenced by the number of times that they go camping each year. In general those who go camping the most frequently, but for shorter periods, are more likely to camp at sites with basic facilities whereas those who camp only once a year, but for longer periods, are more likely to stay somewhere with a better standard of facilities and services. This is a logical relationship. For those people camping only once a year this tends to be a significant part of their summer holiday. When you stay somewhere for more than a few days it becomes important to have access to better facilities, e.g. showers.

The following table highlights how the choice of type of campground is impacted on by the frequency with which regular camper's camp.

TABLE 9: INFLUENCE OF FREQUENCY OF CAMPING ON CHOICE OF CAMPING AREA

TYPE OF CAMPING AREA	ONCE A YEAR %	2-5 TIMES A YEAR %	6 OR MORE TIMES A YEAR %	TOTAL %
Unpowered	26.0	58.2	15.8	100
Powered	44.0	52.0	4.0	100

(Mobius, 2006)

Likelihood to return to same camping area

Campers within New Zealand vary between those who enjoy more structured campground experiences (with 'good' facilities and amenities) and those for whom this is less important (basic facilities only). From the discussions in the focus groups conducted during market research to support this review indicated a connection between the level of facilities and services sought at a camping area and the likelihood that the camper returns to the same camping area year after year (a site specific loyalist) or continually changes camping areas (a site-switcher).

There is an interesting trend evident within camping in New Zealand. This is that a large number of New Zealand campers tend to return to the same location; indeed for many it is important that it is the exact same site, year after year for their holidays. These locations are often considered to be a 'second home', a place where the camper feels as strong a connection as in their real home. This 'connection' is often initially driven by the physical attributes of the place (the surrounding landscape, setting and access to good fishing areas, etc) but develops into one that is driven by the social experience of being amongst a group of other likeminded campers. Many New Zealand families grow up alongside each other at camping areas spending their summer holidays camping at the same site next to the same family. What develops is a real sense of community and shared 'ownership' of these camping areas. This is why many camping areas have allowed semi-permanent occupation of sites to occur as a way of ensuring that these campers are able to access 'their' site at their convenience.

69% of regular campers surveyed have such a strong connection with a place and tend to return to the same camping area for many of their camping experiences. Of these people almost one third return to the same camping area for all of their camping experiences. Just over one quarter (27%) of all regular campers noted that they always go to different camping areas (Mobius, 2006).

TABLE 10: LIKELIHOOD OF NEW ZEALAND CAMPERS TO RETURN TO THE SAME CAMPING AREA

LIKELIHOOD	% OF REGULAR CAMPERS
I mainly go back to the same campground each time	22.2
I often go back to the same campground but sometimes also try different campgrounds	46.5
I always go to different campgrounds	26.9
Other	4.4

(Mobius, 2006)

It is obvious that people with such a strong connection to a place will be severely affected if they are unable to access that place i.e. the camping area closes. For these people the loss of ‘their’ camping area is not something that can be simply offset by moving to another camping area because the same physical and social characteristics are not likely to be able to be replicated.

A similar situation is not likely to occur for those campers who are always seeking out new places to camp. These campers do not have the same strong connection to a particular place but rather have a strong connection to the activity of camping and a desire to experience new places.

Consequently the closure of one camping area may not have any significant impact of these people so long as a diverse range of opportunities to camp are maintained into the future.

The following information is drawn from the market research report. It characterises site specific loyalists and site switchers. In the focus groups, the Regular Campers who said they often returned to the same campground tended to be once a year campers (usually during the Christmas / New Year period), camping with children. Camping in this respect was treated as an annual family holiday – and often there was considerable enjoyment experienced from going back to a familiar campground and seeing many of the same people there year after year. Through this camping experience, many of these people had built long-term friendships with other campers, particularly those at a similar life-stage.

Those Regular Campers who identified themselves as site-specific loyalists:

- Tended to prefer more structured campgrounds with more in the way of facilities and amenities.
- Enjoyed the community aspect and familiarity of the experience of returning to the same campground and seeing the same other campers - “our kids have grown up together at this camp site”.
- Were more likely to be camping with children (including older children / teenagers over 15) for these people, a more structured campgrounds made for an easier and more relaxing camping experience.
- Were more likely to enjoy a few home comforts – many of these people had extremely well-equipped ‘tents’ which sometimes included freezers, and often included double air beds.
- Were more likely to take longer trips, but less frequently – for example, one week, 10 days and up to two weeks.
- Were more likely to utilise private campgrounds – mainly because of the facilities and amenities available.
- Were more likely (but not exclusively) to be once a year campers (often during the Christmas / New Year period).
- The site switchers in the focus groups:
- Were more likely to be slightly younger and more likely to camp with friends – fewer of these Regular Campers camped with children.
- Used a mix of private and non-private campgrounds – private campgrounds tended to be used for longer holidays when more facilities and amenities are preferred, while non-private campgrounds

and more basic campgrounds were more likely to be used for shorter holidays and weekends when facilities and amenities were considered less important –

- *"I can last for a few days without a hot shower"*
- Were more likely to camp two to three times or more each year – often taking one longer trip as well as a number of shorter breaks.

(Mobius, 2006)

Appendix Two

DOC camping code

Be a careful camper and practice 'no trace' camping.

- *Choose your campsite carefully; set up your camp on firm, high or sandy ground. Only camp in designated areas.*
- *Be tidy and always leave campsites clean. Take your rubbish with you if bins are not provided. Food scraps attract vermin.*
- *Use a cooker, fireplace or BBQ. Light fires only where permitted, collect dead wood and keep the fire small. Soak the fire with water before you go.*
- *Detergents, soap and toothpaste can harm aquatic and marine life. Use biodegradable products and wash in a container well away from the water.*
- *Always use toilets provided.*
- *Campgrounds are social places but everyone needs some rest and relaxation. Please respect the rights of others for quiet enjoyment of the outdoors.*
- *Pay your fees to help keep campsites available in the future.*
- *Always thoroughly clean your equipment before and after trips to minimise spreading weeds and diseases.*
- *Protect native plants and animals.*

Toitu te whenua/leave the land undisturbed.

Appendix Three



NEW ZEALAND ECO-WISE TRAVEL GUIDE

New Zealand is a beautiful country. Help keep our towns, cities, parks, beaches and native bush free from pollution and waste. Please also respect our unique flora and fauna. Be active and get involved in caring for the environment. It is everyone's responsibility.

Here are some tips on how to be eco-wise and leave gentle footprints when travelling in New Zealand.



For additional information and more websites see www.mfe.govt.nz/eco-wise

WASTE-WISE

Litter-free places are healthy places. Waste is hazardous if disposed of incorrectly and can attract pests and disease. Reduce the amount of waste you make and dispose of it responsibly.

Don't litter

- Always put all your rubbish in the bin provided or take it away with you when you leave.

Reuse and recycle

- Reuse plastic bags or try not to use them at all.
- Seek out recycling centres for paper, glass, plastic and cans.
- Ask your local i-SITE for the nearest recycling station.
- Reuse your water bottles.

Dispose of waste sensibly

- Use only a designated dump station.
- Get a list of dump stations from the i-SITE.

ENERGY-WISE

Using less energy helps reduce the amount of greenhouse gases in our air. This is because fewer fossil fuels are being burnt to produce electricity. You can help by:

- switching off your electrical equipment when not in use
- turning off the lights when you leave the room
- asking tourism operators about their environmentally friendly practices.

WATER-WISE

Lakes, rivers, beaches and harbours are our treasures and the habitat of many plants, fish and bird species. When enjoying our waterways, please be sure to keep them free of rubbish, spills and introduced species, so that they can be enjoyed by generations to come. You can help by:

- washing and drying your gear between waterways to prevent the spread of unwanted pests like didymo (freshwater algae).

Water is a precious resource and many New Zealand towns and cities experience water shortages during the summer months. You can help by:

- using water sparingly
- taking shorter showers.

TRAVEL-WISE

Around 20 percent of New Zealand's greenhouse gas emissions come from transport. You can help reduce this and save fuel by:

- walking and cycling instead of driving
- using public transport
- reducing your speed on the open road
- switching off your engine when stopped
- choosing to buy or hire a fuel-efficient vehicle
- offsetting your emissions by buying individual carbon credits.

Travel safely

- New Zealand's weather changes rapidly so be prepared.
- Tell someone where you are going and when you plan to return.
- Be firewise – observe fire bans and always check before lighting fires.
- Ask your local Department of Conservation visitor centre or i-SITE for safety information and advice.

Published by the Ministry for the Environment in March 2007. INFOBA. Proudly supported by Tourism Industry Association, Tourism NZ, Ministry of Tourism, Holiday Parks Association and other tourism sector groups. We welcome your feedback and comments on this guide. Please email eco-wise@mfe.govt.nz.

FEEL INSPIRED AND LEAVE REFRESHED BY THE PLACES YOU VISIT.

Appendix Four

Campervans and Motorhomes – Self Contained

Current and future use:

Camping : Camper Van/Buses - Self contained	International – anyone from overseas		National Domestic – visitors from rest of NZ		Local Domestic CO and Otago holidaymakers		
	Now- currently happening	Future – good place to develop activity	now	future	now	future	
							Suggested ideas and product improvement.
St Bathans Domain	y	y	y	y	y	y	Recreation Reserve. Limited ability to cater for large motorhomes in St Bathans due to narrow street and limited parking for large vehicles. Large vehicles would need to be left at the domain.
Lindis River - Ardgour					y	y	Marginal Strip.
Nevis Valley - adjoining rivers and conservation areas	n/a	n/a	n/a	n/a	n/a	n/a	Various – Marginal Strip and Pastoral Lease. Difficult road access. Not appropriate.
Conroy's Dam	n/a	n/a	n/a	n/a	n/a	n/a	Marginal Strip. Difficult access and narrow.
Hawksburn	n/a	n/a	n/a	n/a	n/a	n/a	Marginal Strip. Narrow gravel access.
Fraser Domain	y	y	y	y	y	y	Recreation Reserve with Toilet.
Teviot River	n/a	n/a	n/a	n/a	n/a	n/a	
Danseys Pass Recreation Reserve					y	y	Recreation Reserve, Toilet. Narrow gravel road. Wouldn't actively promote.
Lake Dunstan		y		y		y	LINZ Toilets.
Clutha River – Lindis Crossing/Maori point		y		y	y	y	Marginal Strip.
Lindis River - Lindis Hotel		y		y	y	y	Historic Reserve. Narrow access. Wouldn't actively promote. Difficult access during wet conditions.
State Highway Reserve Goodger Flat adjoins Lindis River.	y	y	y	y	y	y	Road Reserve. Requires toilets. Currently well used.
Taieri River					y	y	Marginal Strip.
Manuherkia River - Galloway, Orlig, Chatto Ck, Omakau, Loop Road St Bathans.			y	y	y	y	Marginal Strip and private land. Small campers only. Wouldn't actively promote.
Homestead – Oteake Conservation Park				y	y	y	Part of Oteake Conservation area. Need to cross a ford. Off Hawkduns Run Rd. Has toilet

							and water.
Beaumont Millennium tk - Clutha River	n/a	n/a	n/a	n/a	n/a	n/a	Marginal Strip and Road Reserve, Contact Land.
Pinders pond		y		y	y	y	Stewardship Land – similar status to marginal strip.
Onslow	n/a	n/a	n/a	n/a	n/a	n/a	Original lake; Pioneer Generation; Central Electric; Beaumont Station. Narrow gravel road.
Waikerikeri – Marginal Strip – Lilico Spur track start	n/a	n/a	n/a	n/a	n/a	n/a	Marginal Strip and Conservation Area Wouldn't actively promote.
Poolburn Dam	n/a	n/a	n/a	n/a	n/a	n/a	Irrigation Reserve, Narrow gravel road.
Kyeburn River						y	Marginal Strip. Wouldn't actively promote.
Upper Manorburn					y	y	Irrigation Reserve. Narrow gravel road. Wouldn't actively promote.
Wedderburn Domain		y		y		y	Development potential.
Waipiata Recreation Reserve		y		y	y	y	Development potential.
Tarras Domain		y		y		y	Development potential.
Pateroa School		y		y		y	Development potential.

n/a – Not appropriate – not appropriate for this activity to occur in the area.

Appendix Five

Campervans and Motorhomes – Not Self Contained

Current and future use:

Camping : Camper Van/Buses - <i>Not self contained</i>	International – anyone from overseas		National Domestic – visitors from rest of NZ		Local Domestic CO and Otago holidaymakers		
	Now- happening	Future – good place to develop activity	now	future	now	future	
							Suggested ideas and product improvement.
St Bathans Domain	y	y	y	y	y	y	Recreation Reserve, Toilet. Limited ability to cater for in St Bathans due to narrow street and limited parking for large vehicles. Need to remain at the domain.
Lindis River - Ardgour					y	y	Marginal Strip.
Nevis Valley - adjoining rivers and conservation areas	n/a	n/a	n/a	n/a	n/a	n/a	Various – Marginal Strip and Private Land.
Conroy's Dam					y	y	Marginal Strip. Permanent toilet required. Difficult access and narrow.
Hawksburn	n/a	n/a	n/a	n/a	n/a	n/a	Marginal Strip Narrow gravel access
Fraser Domain	y	y	y	y	y	y	Recreation Reserve, Toilet.
Teviot River	n/a	n/a	n/a	n/a	n/a	n/a	
Homestead Oteake Conservation Park					y	y	Recreation Reserve, Toilet. Narrow gravel road. Not actively promoted.
Lake Dunstan		y		y	y	y	LINZ Toilets.
Clutha River – Lindis Crossing/Maori point				y	y	y	Marginal Strip.
Lindis River - Lindis Hotel		y		y	y	y	Historic Reserve. Narrow access. Toilet onsite.
State Highway Reserve Goodger Flat adjoins Lindis River.	y	y	y	y	y	y	Road Reserve. Requires toilets. Currently well used.
Taieri River					y	y	Marginal Strip.
Manuherkia River - Galloway, Olig, Chatto Ck, Omakau, St Bathans loop road,			y	y	y	y	Marginal Strip and private land. Small campers only. Toilet system required.
Homestead Campsite – Oteake Conservation Park				y	y	y	Part of Oteake Conservation area. Need to cross a ford. Off Hawkduns Run Rd. Has toilet and water.
Beaumont Millennium tk - Clutha River					y	y	Marginal Strip and Road Reserve, Contact Land. Toilets required.

Pinders pond		y		y	y	y	Stewardship Land. Over night, no long stay. Toilet available.
Onslow	n/a	n/a	n/a	n/a	n/a	n/a	Original lake; Pioneer Generation; Central Electric; Beaumont Station. Narrow gravel road.
Waikerikeri	n/a	n/a	n/a	n/a	n/a	n/a	Marginal Strip and Conservation Area.
Poolburn Dam	n/a	n/a	n/a	n/a	n/a	n/a	Irrigation Reserve. Narrow gravel road.
Kyeburn River						y	Marginal Strip. Toilet system required.
Upper Manorburn					y	y	Irrigation Reserve. Narrow gravel road. Wouldn't actively promote.
Wedderburn Domain		y		y	y	y	Development potential – toilet provided.
Waipiata Recreation Reserve		y		y	y	y	Development potential.
Tarras Domain		y		y		y	Development potential.
Pateroa School		y		y		y	Development potential.
Roxburgh		y		y		y	Development potential.

n/a – Not appropriate - not appropriate for this activity to occur in the area.