

Freedom Camping Literature Review

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Summary of Evidence

The purpose of this study is to assess existing insight regarding freedom camping in New Zealand in order to identify what information is currently available, where existing data meets information needs, and where knowledge gaps exist.

The study examined a number of areas related to freedom camping where greater understanding will help to shape policy decisions going forward. A number of information sources were examined for this study, including existing tourism datasets, academic research and information held by members of the Responsible Camping Forum. The sources used highlighted some clear trends, most notably that there is no single comprehensive source of information on this topic available at this time.

Keenan's 2012 study on the impacts of Freedom Camping in Southland and Otago notes that "there is a *significant* lack of literature or research on the freedom camping tourist" and that publicly available, up-to-date statistics on the subject are lacking.

This report has identified a number of significant gaps in existing information, some of which are likely to impact upon the development of strategies to successfully manage freedom camping in the interests of all stakeholders. These gaps are noted in the summary table overleaf.

Table 1 - Summary of Quality of Evidence for Key Freedom Camping Insight Needs

| Quality of Evidence | Strong Evidence | Moderate Evidence | Some Evidence | No Evidence |
|--------------------------|---|--|---|---|
| Profile/ Demographics | Freedom campers tend to come from Australia, New Zealand, UK and Central Europe | Age range of freedom campers tends to be 35 & under or 55 and over | Freedom camping is undertaken by "non-tourists" (i.e. seasonal workers and/or homeless people) | Impact of non-tourist freedom campers on overall freedom camping numbers is unknown |
| Behaviours | Freedom campers also visit commercial camp sites during their trip Internet, guide books, recommendations and apps are main info sources | Freedom campers tend to move regularly between sites, and do not tend to plan their overnight stops in advance | Freedom camping is most common during summer Prohibition does not deter freedom campers from camping in certain areas | Which factors have greatest influence on site choice Impact of prohibition on neighbouring districts/local authorities is unclear Whether behaviour differs between self-contained and non-self contained vehicle users |
| Motivations | Cost, scenery, seclusion, proximity to attractions are all significant motivations for freedom camping | | Previous visits to a particular site, social aspects of freedom camping and freedom camping being part of NZ identity are potential motivations | The extent to which freedom campers trade off between motivations Whether prohibition would encourage freedom campers to move to commercial sites |
| Expenditure | | | Freedom campers spend an average of \$100-\$120 per day Freedom campers most likely to partake in nature based activities | Freedom campers use freedom camping sites in order to spend more money on activities |
| Perceptions | Anti-social behaviour such as littering and defecation occur in freedom camping areas | The public is not opposed to freedom camping so long as there are rules in place to manage activity | Some businesses support freedom camping Public perceptions of freedom camping is worsening | Freedom campers are responsible for anti-social behaviours Value placed on enjoying the right to freedom camp by the general public is unclear |

Who is Freedom Camping?

According to the International Visitor Survey (IVS), an average of 60,000 international visitors per year freedom camped for at least one night during their stay in New Zealand in the 2013-2015 periods. In 2015, 12,882 international visitors reported using freedom camping as their main form of accommodation during their stay. This is equivalent to 0.4% of all international visitors to New Zealand in 2015.

The Department of Internal Affairs' (DIA) Situational Analysis Document noted that demand for camping from international visitors as a form of accommodation is growing, with a 79% increase in campervan hires 2012-2015, and a 67% increase in visitors using paid camping or caravan accommodation during the same period. For the year ending June 2016, holiday parks had the largest per annum growth rate of accommodation types, while overall occupancy rates are also increasing.

Keenan's 2012 study on freedom camping in Otago and Southland noted that "there is a general acknowledgement that there are growing rates of freedom campers around the country..." citing various papers from 2010 and 2011 which confirm this. However, it is important to note that while the number of visitors using campervans is growing, the number of visitors to New Zealand who use using freedom camping as their primary form of accommodation has actually fallen since 2012, and as Far North District Council noted in their 2016 report, the number of international visitors using freedom camping as their main form of accommodation has actually dropped by 25% during this period according to IVS data. (Far North District Council/IVS)

Available data on domestic tourism is limited. Angus & Associates' Visitor Insights Programme found that about 1% of domestic visitors used freedom camping as their primary mode of accommodation between 2014-2016. In addition, NZMCA membership has increased almost 20% between 2013 and 2017 to 71,500 members. While this growth in membership could cause an increase in demand for freedom camping among domestic visitors, it is also possible that some of this membership growth could have been as a result of existing freedom campers joining NZMCA in response to tightening restrictions on freedom camping.

Origin

Studies carried out by Angus & Associates' (Visitor Insights Programme 2014-2016), Central Otago District Council (2014), Christchurch City Council (2010) and by the University of Otago (2014), found that freedom campers generally come from New Zealand, Australia or Europe (particularly Germany). Caldicott's 2014 study in Australia noted that freedom camping is very much a cultural norm in European countries such as France and Germany. The 2010 Christchurch City Council noted that freedom camping was a cultural norm in Germany,¹ meaning German visitors may also expect that it is accepted here.

The 2006 Department of Conservation report noted that domestic travellers who camp regularly, but for short periods were more likely to Freedom Camp, compared to those travellers who preferred to stay at one spot for an extended period, (i.e. staying at one site for a fortnight during the Christmas period). Almost 70% of respondents in this study return to the same site regularly, developing a sense of connectedness and shared ownership to their pitch over a number of years.

¹ In Germany, it is legal for campervans to park in any public car parking space for one night in order to allow the driver to rest. Freedom camping in other areas, or in tents, is illegal, although the extent to which this is enforced varies between regions.

Age Profile

In terms of age profile, there is conflicting evidence in the available literature. Central Otago District Council's survey of 1,000 freedom campers found that respondents were primarily domestic and aged 60+, while respondents to the 2016 study by Kearns et al. tended to be aged 40 or over. DIA's Situational Analysis suggested that so-called "grey nomads" and families using freedom camping as accommodation would primarily be domestic, using self-contained vehicles, while younger domestic and international visitors will freedom camp in a mix of self-contained and non-self-contained vehicles. The majority of respondents in the Kearns et al. study were also domestic visitors in self-contained vehicles.

Far North District Council quoted IVS data which suggests that 46% of freedom campers are aged 29 or below, while the University of Otago research found that 74% of freedom campers were under 35 years of age. Between Q2 2014 and Q2 2016, Angus & Associates' Visitor Insights Programme surveyed 280 visitors who used freedom camping as their primary source of accommodation. The two most common age groups interviewed were those aged 35 years and under, and those aged 55 years and over. The 2010 research project by Christchurch City Council noted that the freedom campers in Christchurch tended to be young people, travelling in pairs and often from overseas.

Hutching and Lim's 2016 study of freedom camping in Taranaki noted that domestic freedom campers tended to be older, stopping for short periods in each area during vacations of around two weeks or less in length. In contrast, International freedom campers tended to be aged in the 20-30 bracket, and travelling for more than 12 weeks at a time.

Finally, the Department of Conservation's 2006 camping survey suggested that younger campers were more inclined to stay at sites with limited facilities, although this report does not report any specific findings that may explain why this is the case (i.e. budgetary constraints, more relaxed rules when compared to commercial holiday parks etc.).

Freedom camping by non-tourists

The DIA Situational Analysis identifies two other freedom camping demographics that will tend to use private, non-self-contained vehicles: people experiencing homelessness, who may be mistaken for freedom campers; and seasonal workers, who are freedom camping in the vicinity of their employer. Seasonal workers could potentially be either homeless (i.e. they cannot afford accommodation in tourist areas, where there is pressure upon housing, such as the Queenstown area), or alternatively, they could be "true" freedom campers (i.e. they choose to freedom camp to save money etc.).

The 2010 Christchurch City Council survey noted that

"the issue of homelessness in Christchurch has become evident through this research study, as some identified as 'freedom campers' in the tourist off-season are in fact disadvantaged locals living in vehicles in public places." (Christchurch City Council, 2010)

Knowledge Gaps

Data from the IVS and the Commercial Accommodation Monitor (CAM) shows that demand for camping as a source of accommodation is growing among international visitors. However, IVS data also suggests that incidences of freedom camping by international visitors are stagnating.

In terms of available data, there is consistent evidence to suggest that freedom campers tend to be aged 35 & under or older couples traveling without children.

There is also evidence to suggest that freedom camping is particularly popular among visitors from Australia, the UK, central European countries such as France and Germany, and domestic visitors.

Beyond this, conclusive data is limited for a number of reasons:

- There is no comprehensive dataset for domestic visitors available at this time, which makes it very difficult to assess the overall impact that New Zealanders have upon the Freedom Camping issue.
- Existing studies may have used differing methodologies to gather data, and cover different geographical areas and tourism markets, which make comparisons difficult.
- Sample sizes in datasets such as the IVS are relatively small for freedom camping, which can have a significant impact upon the reliability of data, other than general, high-level conclusions.
- There is little understanding of the proportional make-up of the freedom camping population. For example, if a significant number of domestic freedom campers are people experiencing homelessness, then this is an issue that goes beyond the scope of the tourism industry.

All of these issues create their own challenges. We would recommend that a more uniform research programme is developed, in order to generate a more reliable understanding of the composition of the freedom camping market.

Behaviour of freedom campers in New Zealand?

Location

According to IVS figures for the year ending December 2015, just 18% of international visitors who had freedom camped in New Zealand used this as their main form of accommodation. In contrast, 32% reported that their most common form of accommodation was a holiday park or other paid for campground. This highlights that the majority of international visitors who freedom camp, do not do so exclusively, and aligns with the findings of Keenan et al.'s 2015 study across three regions on New Zealand. This study reported that freedom campers surveyed were

"engaged in a form of hybrid tourist behaviour, moving frequently between formal campgrounds and free camping sites. This pattern of activity speaks once more to a combination of mobility and flexibility – something that is central to the freedom being pursued by freedom campers."

(Keenan et al, 2015)

Covec's 2012 report *Understanding the Value Created by Campervan Tourists in New Zealand* noted that domestic visitors were likely to spend more of their night's away freedom camping, compared to international visitors (75% vs 89%). Becken and Wilson's 2008 study of 1,113 Kea Campervan customers by Lincoln University made similar conclusions, finding that "13% of campervan nights by international visitors are "freedom camping", compared to 23% of domestic campervan nights". (Becken and Wilson, 2008). NZMCA statistics suggest that 60% of their members' freedom camped at least once in 2011.

Issues with freedom camping have been reported throughout the country, though it is apparent that it is a greater issue in some areas than others. The 2011 Freedom Camping Bill Regulatory Impact Assessment noted that

"problems [with freedom camping] are particularly acute in regions with high tourist numbers, for example in Fiordland, Otago, Southland, West Coast, Nelson-Marlborough, Coromandel and Bay of Islands."

At present, Geozone are likely to hold the most useful set of available data on freedom camping numbers in specific areas, though it should be noted that data collected via the Campermate App would not necessarily be representative of all freedom camping activity.

Timing

According to Department of Conservation research undertaken in 2006, camping is very much seen as a summertime activity by New Zealanders, due to better weather, statutory holidays and school holidays, with 90% of regular campers reporting a preference for camping over the Christmas-New Year period.

While there is no specific evidence about the seasonality of freedom camping, and the IVS sample of freedom campers is too small to make reliable conclusions, anecdotal evidence would suggest that the peak summer tourism season is also likely to be the peak freedom camping season.

Available evidence suggests that freedom campers tend to move between sites on a regular basis. The 2016 study by Kearns et al. found that the majority of freedom campers would stay at an individual site for one or two nights. (Kearns et al., 2016) The University of Otago study noted that the vast majority of freedom campers interviewed (73%) chose to stay at the site they were interviewed at for two nights, which roughly aligns with research undertaken by BDO in Australia, which reported that 74% of freedom campers would stay at a particular site for a maximum of three nights.

Choice of Site

Dorfman's 1979 study, quoted in Collins & Kearns 2010 report, suggests that specific environmental conditions (e.g. good weather, scenic beauty and absence of crowds) and personal recreation goals (e.g. enjoying the outdoors, peace and quiet) are associated with satisfying experiences, whereas opposite characteristics were associated with dissatisfying experiences. This explains why some campers do not want to camp within commercial holiday parks (to avoid crowds), and why some areas are more popular than others (scenic beauty). There is no evidence to prove or disprove whether or not freedom campers place a higher value on scenery than camping in quiet areas, however if this is the case, then this would suggest that campers may opt to stay at crowded sites offering optimal vistas, even if these sites are full, putting particular pressure on popular tourist areas.

As a result, it would be beneficial to have a greater understanding of why freedom campers choose particular sites and whether smaller centres located away from traditional tourism routes may actually welcome freedom camping locally. A study by NZMCA suggested that freedom camping can benefit smaller centres, citing Murchison as an example, with 68% of NZMCA members reporting that they would have completely bypassed the town were it not for the presence of the NZMCA campsite nearby, but instead spending an average of \$117 per vehicle per day during their stay. (NZMCA Murchison Park Survey, 2012)

Information Sources

Christchurch City Council's 2010 study highlighted that about half of respondents had used the internet to gather information, usually to research guidelines and regulations regarding freedom camping, (though not usually gathering information from Local Authority websites) with information and guidance also coming through word of mouth, guide books and visitor centres. Becken and Wilson's 2006 study notes that previous travel experience (both in New Zealand and elsewhere) and word-of-mouth were extremely influential factors in visitors' core decisions. Guidebooks and to a lesser extent the Internet were used at home; a few visitors had used brochures and travel agents. Over one third of visitors had friends or relatives in New Zealand, who advised them on their route and who often constituted an important influence on their itinerary. (Becken & Wilson, 2006)

In terms of choosing specific camping spots, Christchurch City Council's study reported that the majority simply chose where to stay by driving around to find a spot, while talking to other visitors in backpacker hostels who gave them advice on where to stay was also an influential factor in site choice. Keenan notes that Swaffield et al.'s 2005 study also found that a large proportion of visitors to New Zealand tend to make decisions around where to travel whilst in transit; and that Fitt et al.'s 2005 study of freedom campers in the Waikaremoana Region found that freedom campers had no nights of accommodation pre-booked.

It should be noted that in the University of Otago's study completed in 2014, 54% of freedom campers reported that they had found the site they were staying at through the Campermate App. (University of Otago) The Campermate App is becoming an increasingly popular source of information, with the app now being used approximately 36,000 times per day by visitors looking for information about free, low cost and commercial campsites, as well as other services such as ATMs, attractions and petrol stations, throughout New Zealand.

Transport

Keenan's 2012 study notes that "New Zealand is known internationally as a touring destination", primarily as a result of popular visitor attractions being spread widely throughout the country. Keenan notes that independent transport options tend to be more common among visitors from nations with higher rates of "free independent travellers" (FIT), (namely Australia, Germany and the

UK) and suggests that this may also explain why incidences of freedom camping tends to be higher among these visitors, than among visitors from Asian countries, who have traditionally had a smaller proportion of FIT visitors travel to New Zealand.

The University of Otago study of 500 Freedom Campers at three sites in Otago revealed that 56% were staying in non-self-contained vans, compared to just 25% who were in self-contained vehicles, with a further 15% sleeping in cars. The study also found that 74% of freedom campers travelled in a group of two or more, though it is unclear whether larger groups would share a vehicle or travel as part of a "convoy", as 14% reported traveling in groups of four people or more.

Bylaw Enforcement

Far North District Council's research into local freedom camping shows that the restriction or prohibition of freedom camping is likely to result in an increase in recorded instances of non-compliance, highlighting the experience of Marlborough District Council where there were 100 complaints, 200 instances of campers being asked to move and 88 infringements recorded during a trial period of freedom camping restrictions in the district between December 2015 and February 2016. The same period the year prior had 19 complaints, 62 campers asked to move and 14 infringements. While restricting the number of sites available to freedom campers is likely to lead to greater levels of non-compliance, it is unclear whether this is due to: an increase in the number of freedom campers; visitors being unaware of new restrictions; or greater public sensitivity to freedom camping in the area, resulting in increased reporting of infringements.

A further example of freedom campers failing to adhere to rules occurred in the Queenstown Lakes District, where signs were erected to advise the prohibition of camping at the One Mile car parking site. A total of 321 vehicles stayed overnight at the site over the four weeks when no signs were present. In contrast a total of 341 vehicles stayed overnight at the One Mile Car Park over the four weeks following the installation of the official "No Camping" sign. The average number of vehicles camping overnight in the car park was 11.5 per night when no signs were present or 12.2 per night when the "No Camping" sign was installed. While seasonal demand may have had some impact here, it would appear that simply prohibiting freedom camping is not a sufficient deterrent, and that ongoing site management is also required, if prohibition is to be successful.

In addition, prohibiting freedom camping by some local authorities may simply shift the issue to neighbouring authorities. For example, the Far North District Council study noted that campers who would have previously stayed in Christchurch were pushed into areas like Selwyn District following the prohibition of freedom camping in Christchurch. Selwyn district's main freedom camping site, Coes Ford, increased from roughly 50 to 75 vehicles to 75 to 100 after Christchurch closed their sites to freedom camping. It would be useful to understand if this pattern has been repeated elsewhere, and what impact this has, particularly on smaller neighbouring authorities, who may lack the necessary resources to manage freedom camping effectively.

Knowledge Gaps

There is strong evidence to suggest that the majority of freedom campers are "hybrid" campers, meaning that freedom camping is not their sole accommodation type while travelling, with many also choosing to stay in commercial holiday parks during their trip.

There is some evidence to suggest how long freedom campers will stay at particular sites, however it would be useful to understand this on a greater scale. If it is the case that "true" freedom campers are touring the country and moving between sites regularly, then it would suggest that people staying at sites for extended periods of time may need to be reclassified as people experiencing homelessness, rather than being considered as being freedom campers.

There was no evidence to indicate whether or not behaviours differ between freedom campers using self-contained and non-self-contained vehicles.

There is evidence to suggest that the internet, guide books, word of mouth recommendations and social media/apps influence behaviour of freedom campers. Further research regarding the influence of apps and social media would likely prove useful, as the evidence that is available suggests that these are becoming an increasingly influential source of information for travellers, and may offer opportunities to manage freedom camping in a more proactive manner.

There is also some evidence to suggest that there is limited planning of site choice by freedom campers. It would be useful to understand what motivates freedom campers to stop in particular towns/locations, and to understand if marketing areas as being “freedom camping friendly” or otherwise would have an impact on this behaviour, which may in turn make management of freedom camping easier for local authorities.

There is some evidence on the transport preferences of freedom campers, though it would be useful to understand use patterns in more detail, which would allow more targeted messaging to be used towards particular groups.

The overall impact and effectiveness of enforcement remains unclear at this stage, and it may be that the costs of trying to manage freedom camping activity outweigh the returns received from infringement notices, or simply forces freedom camping issues onto neighbouring local authorities. We would suggest that more research needs to be done in this area to assess the effectiveness of enforcement versus education.

Why do people choose to Freedom Camp?

Other sections in this report have primarily concentrated upon New Zealand information, due to the specific nature of the issues in this country compared to other nations where significant levels of freedom camping occur, such as Australia, Canada and the United States. In contrast, we consider motivations as more likely to be universal in nature, and we have therefore consulted a greater number of international sources when compiling this section.

Cost

Cost is often cited as being a major motivator for choosing to freedom camp. This was the case in the study undertaken by the University of Otago (86% chose to freedom camp to save money), and Christchurch City Council's survey of 100 freedom campers in 2010, which reported that the majority of freedom campers chose to freedom camp to save money, followed by having the choice to stay where they wanted (usually by the sea) and to be close to nature. A recent study of Campermate App users in Clutha District by Geozone found that 89% of respondents chose freedom camping ahead of other options due to cost.

Other Factors

In addition to cost, a number of studies have suggested that intrinsic factors may also act as a motivation for freedom camping. The University of Otago study of 500 Freedom Campers at three sites in Otago revealed that the main attractions to particular sites were the scenery/environment (57%), on-site facilities (33%) and proximity of attractions (17%). The study of 61 freedom campers by Kearns et al. in 2016 suggests that freedom camping "allows access to isolated, private and natural sites – and thus the possibility of simpler, quieter and more self-sufficient leisure", and that freedom (59%) and comfort (34%) were more significant factors in the decision to freedom camp, than cost (29%). (Kearns et al., 2016)

In terms of domestic visitors, Collins & Kearns 2010 study quoted a 1999 report by Turner, which reported that freedom camping was part of New Zealand identity, with coastal campgrounds in particular being "part of the Kiwi tradition and are closely connected with idealized visions of childhood and family life". In addition, Keenan's study notes the high value that New Zealanders place upon retaining public access to the conservation estate, (Booth, 2006, Higham 1998, McIntyre et al., 2001) while 91% of respondents to DoC's 2006 survey "identified access to camping locations as an important issue". As was noted in Hansard during the debate on the Freedom Camping 2011 Act:

"The importance of camping, coupled with the demand for public access, fuels the debate that freedom camping should be allowed 'as a right' on public lands."

Some freedom campers value the relative seclusion offered by freedom camping, and Collins & Kearns also highlighted the finding by Morton et al in 1973 that some campers did not consider commercial holiday parks to be significantly different from their everyday lives, due to the

"high packed density...thus offering not an escape from urban life, but serried rows of tents packed into an open field..."

Focus groups convened as part of DoC's 2006 study on camping in New Zealand highlighted that many participants saw camping as a "back to basics" activity, which would be more in common with freedom camping than visiting a well provisioned holiday park. The same report also noted that 20 % of respondents to an earlier survey considered crowded campgrounds to be a negative aspect of camping. (Department of Conservation, 2006)

Research by the NZMCA into member preferences in 2007 and 2012 suggested that safety was a key priority when selecting a site, which matches international research by Hardy and Gretzel (2008) in the USA, where focus group participants stated that safe sites and safety in numbers had a strong influence on their choice of campsite, preferring those sites where like-minded people were parked up. The NZMCA study noted that cost and location were also influential factors in site choice.

For some visitors, freedom camping is simply a matter of convenience, allowing them to sleep in close proximity to the entry point for their activity of choice (e.g. surfing, hunting); as an opportunity to rest during their travels (e.g. those following cycling or walking trails); or on occasions where staying in commercial camp sites may not necessarily be possible (e.g. visitors being stranded by inclement weather or earthquake damage). While it is unclear the extent to which these visitors contribute towards freedom camping numbers, it is unlikely that enforcing freedom camping regulations for these scenarios would be a straightforward endeavour, and would require a great deal of resource and management.

The 2011 Freedom Camping Bill Regulatory Impact Assessment noted that Freedom Camping was not considered to be a significant issue within the conservation estate at that time, due to the majority of backcountry campers being experienced and considerate of other users. (Freedom Camping Bill Regulatory Impact Assessment, 2011) While the provision of low cost camping facilities by the Department of Conservation may have also helped to manage the issue on DoC land at that time, it is likely that these sites will face increasing pressure if tourism numbers continue to grow to the seven million visitors forecast in 2025.

International Studies

A range of motivations have also been noted by a number of international studies: Caldicott's 2014 study in Australia noted a number of potential motivations for freedom camping, including

"a desire of campers to experience the freedoms of non-regulated, non-commercial accommodation, some by a desire to make limited budgets go further, some as a result of sales-pitch at the point of their RV purchase and some by camper 'word-of-mouth'". (Caldicott, 2014)

BDO's 2013 survey of 216 non-commercial campers in Australia reported that 48% considered location to be the most likeable aspect of a non-commercial camping ground, while just 9% nominated cost. In contrast 30% noted that cost put them off staying at commercial campgrounds. (BDO, 2013)

A University of Tasmania survey of older caravanners reported that

"the preferred option is free camping in a natural environment that is quiet, spacious and not too crowded, but not too far from major attractions". (UTAS, 2011)

Freedom Camping Australia surveyed in excess of 1,000 freedom campers, and concluded that

"the primary drawcard [when selecting a freedom camping site] is the location, followed by 'recommended' by a friend, with 'previous visit' and 'value for money' also considered".

A study of freedom campers in the USA suggested that the social aspects of freedom camping were also an important draw, as

"RVing was seen as a means to travel with people with common bonds, and a means by which they could meet new people and experience fellowship. To both independents and caravanners, interaction with other visitors formed an equally significant part of the travel experience."

In addition, this study also noted that "when considering where to travel and where to stop, safety and security emerged as a significant factor", suggesting that safety in numbers may be a motivation for freedom campers to camp in close proximity to one another, (Hardy & Gretzel, 2008) in common with the findings of the NZMCA.

Knowledge Gaps

There is strong evidence to suggest that cost, location, environment and safety are all motivating factors for choosing to freedom camp, and to do so at particular sites. However, the evidence on which of these factors is more important is mixed, and there is no research available to suggest the extent to which freedom campers would be prepared to trade off one benefit against another, nor is there conclusive evidence to suggest whether different freedom camper demographics have different motivations for freedom camping.

There is some evidence that freedom campers choose to purposefully avoid staying at commercial sites, and it would be useful to have a greater understanding of the extent to which this is true, given the common assumption that freedom campers will simply migrate to commercial sites if freedom camping is to be prohibited.

There is also limited evidence regarding whether motivations for freedom camping differ between demographics, or between geographical areas. It is likely that the profile of freedom campers may differ between some regions, which may mean that a suitable management plan in one area may prove less suitable in others.

Until there is a greater understanding of motivations for freedom camping in New Zealand, there can be no comprehensive solution to the issue, and we would recommend that further research is undertaken to better understand these motivations.

Expenditure by Freedom Campers

Existing Studies

According to MBIE, international visitors who freedom camped at some point during their stay in New Zealand spend more on average (\$4,880) compared to those who do not (\$2,400) per visit. However, this includes all international visitors, including those who could have freedom camped for just one night. It should also be noted that international visitors who freedom camp are also likely to stay in the country for a longer period of time than those who do not, and when expenditure is calculated on a daily basis, the average is \$100 per day of expenditure for visitors freedom camping, compared to \$156 for non-freedom camping visitors (IVS/MBIE)

Varying levels of expenditure by freedom campers have been noted in a number of smaller studies around the country, including \$89 per day in Marlborough, and \$195 per day in Dunedin. NZMCA research into expenditure by their members in 2012, which noted a *per vehicle* spend of \$117 per day by visitors to NZMCA's park in Murchison, while private research undertaken into expenditure by self-contained freedom campers at a freedom campsite in Taupō reported an average per vehicle expenditure of \$401 during their *two-day stay* at the site (the maximum stay allowed at that site). We have not assessed the individual methodologies of each study, and so cannot comment on whether any one figure is more authoritative than another. However, it is entirely possible that different areas will see different levels of daily spending by freedom campers.

Angus & Associates have undertaken expenditure surveys among commercial holiday park visitors in the past, with the most recent study in 2014/15 suggesting an average daily spend of \$153.65 per day, or \$118.88 per day when accommodation costs are excluded. While there is anecdotal evidence to suggest that the figures in this report have been used to both support and argue against freedom camping, the reality is that this study was focused upon visitors staying in commercial holiday parks, and there is no evidence to say that expenditure minus accommodation portrays an accurate picture of spending by freedom campers.

Expenditure on Activities

Research by Christchurch City Council in 2010 suggested that freedom campers choose to do so in order to have more money to spend on other things, although we have uncovered little specific data to prove or disprove this.

Data taken from Angus & Associates' Visitor Insights Programme for the period Q2 2014 to Q2 2016 suggests that freedom campers were more likely to visit attractions in a non-urban setting, with nature and wildlife attractions proving particularly popular.

The University of Otago's study found that freedom campers surveyed tended to visit 3.75 attractions in the area, though notably, the most commonly visited attractions appear to be free "natural" attractions, such as beaches and areas where wildlife can be seen in the wild. The NZMCA's 2012 study into member habits reported similar findings, with relaxing, site-seeing and walking being the most common activities while camping.

NZMCA studies in annual expenditure by members in 2007 and 2012 found that entertainment and eating out accounted for the lowest proportion of annual spending, compared to fuel, shopping and maintenance. However this figure cannot be considered as representative of all freedom campers, since NZMCA members account for just one sector of the overall freedom camping market (primarily older, domestic campers in self-contained vehicles), and should only be considered indicative, as members reported being unable to recall their expenditure accurately during the 2007 survey.

Knowledge Gaps

While existing information suggests that an average daily spend of around \$100-\$120 per day would appear to be realistic, the differing methodologies between studies and the particular traits of each region (e.g. Freedom Campers may spend more in a day in Queenstown, than in Wellington as activities tend to be costlier) make it very difficult to assess expenditure accurately based on current evidence.

As a result, it is simply not possible to understand overall expenditure by “true” freedom campers at this time, which in turn means we cannot fully appreciate whether or not the benefits of freedom camping outweigh the costs of managing it at a national level.

In addition, it should be noted that differing reporting styles could result in data being misinterpreted, as some studies have reported expenditure on a per vehicle basis, while other have reported on a per person basis.

Finally there is no conclusive evidence to suggest whether or not freedom campers choose to freedom camp in order to spend money on activities, rather than on accommodation.

We would suggest that the gap in expenditure research is significant and that a uniform methodology be developed in order to allow more useful comparisons to be made going forward. DIA have developed a hub for local authorities to share insights, and this may also allow the development of standardised questions and methodology throughout the country.

In addition, it would be useful to understand the extent to which freedom campers substitute expenditure on accommodation to spend money on other activities.

Perceptions of Freedom Camping

Perceptions of the General Public

Perhaps the biggest complaint about freedom camping in recent years is around the impact that freedom campers have on the environment where they stay, with complaints around noise, littering, incorrect wastewater disposal and defecation common. Keenan highlights Cullen et al.'s 2001 study of roadside areas in Westland, which found that lay-bys and rest areas were often used as toilet stops, despite a lack of suitable facilities, with many sites having remains of toilet paper and human waste. In 2009, a study of 50 sites used by freedom campers in the Queenstown-Lakes District Council area found that rubbish was left behind at 98% of sites, 16% had evidence of human waste and 24% had no nearby toilet facilities. (Regulatory impact statement: Freedom Camping Bill, 2011)

However, while these issues are often associated with freedom campers, there is little evidence to suggest that this is solely down to freedom campers, and the extent to which other travellers are responsible for these issues is unknown. Indeed, concern for the environment is shared by many freedom campers, with many respondents to Christchurch City Council's 2010 study expressing

"concerns for ensuring they maintained high environmental standards and often requested information about recycling etc." (Christchurch City Council Freedom Camping Management Plan, 2010)

A recent survey by Campermate also noted that some freedom campers felt let down by what they perceived to be a minority of their peers who misbehaved.

"The problem is not the majority of travellers but a percentage of dumb people. Some people aren't aware of the consequences of their behaviour towards nature and other people..." (Campermate, 2017)

While media reports of freedom camping have tended to be overwhelmingly negative during the past two years, the small volume of research produced by local authorities suggests that local residents are perhaps more tolerant of freedom campers than may have been expected. Christchurch City Council's 2010 Freedom Camping Management plan noted that residents were not opposed to a small number of camper vans staying for short periods of time. (Christchurch City Council Freedom Camping Management Plan, 2010)

Similarly, the March 2015 Auckland People's Panel noted the majority of respondents recognised that freedom camping could offer some benefits, and that 55% who had seen freedom campers locally had noted no issues, though littering, public spaces being unavailable and unsanitary practices were highlighted as observed issues among some respondents. 46% of panellists felt that freedom camping should be allowed in some parts of Auckland, though most felt that it should only be allowed in areas offering adequate facilities (e.g. toilets and bins), and that there should be restrictions on the length of stay and the number of campers staying at an individual site at any one time. (Auckland People's Panel - March 2015)

However, while perceptions of freedom camping may not necessarily be as negative as is portrayed in the media, a survey of 33 local authorities by TIA in April 2016 suggested that half of all respondents had noted that community perceptions towards freedom camping had worsened over the past year.

As tourism relies on the retention of a Social Licence to Operate (SLO) if it is to be successful, the sector must ensure that the concerns of the general public are understood both in terms of the right to freedom camp in New Zealand, as well as the impact that freedom camping is having upon

communities. The November 2016 "Mood of the Nation" survey by TIA and TNS suggests that there is a growing concern about the number of international visitors visiting the country, and while it is not entirely clear at this stage whether concerns about freedom camping are widespread, or a vocal minority, it is important that the sector continues to monitor public sentiment and to engage with communities to ensure that the potential benefits of freedom camping are also understood.

Perceptions of Local Businesses

NZMCA's 2012 study of freedom camping in Murchison and Tāupo suggests that local business owners recognise that freedom camping can benefit the community. In Murchison, it was estimated that NZMCA members had spent around \$55,000 at local businesses over a period of four weeks. In addition to expenditure, responding businesses also noted that NZMCA members were a valuable marketing tool for the town, via word-of-mouth recommendations, and that the presence of the NZMCA Park had helped to the vibrancy of the town. In Tāupo, more than 100 businesses signed a petition to the local council, requesting that the freedom camping site at Ferry Road remain available to self-contained campers. In addition, Hutching and Lim's 2016 report on freedom camping in Taranaki noted that NZMCA's partnership with local communities, RSA's and golf clubs has had a positive impact on communities, including increased security and reduced vandalism.

Perceptions of Freedom Campers Themselves

Christchurch City Council's 2010 study noted that the vast majority of freedom campers were satisfied with their camping experience in the city. They noted that they did not feel that sufficient explicit information was available from places such as i-Sites at that time, though this may have changed in the seven years since this study was published. This study also found that the majority of respondents would not visit Christchurch if freedom camping was prohibited, citing:

"the added cost of accommodation, either deterring or limiting a stay in the city, and the loss of the primary motivation – freedom to choose when and where to camp or being close to the outdoors."
(Christchurch City Council, 2010)

While a number of surveys interviewing freedom campers have been undertaken, these have been undertaken at a local level, which may not necessarily translate into nationwide results. New technology may make wide-scale data collection more feasible going forward. For example, the Campermate App can be used to send out short surveys to users, and while the sample is not absolute, it may provide rapid answers to track freedom camper perceptions.

As an example, results from a recent Campermate survey suggest that freedom campers have a mixed understanding of freedom camping rules, with online resources and word-of-mouth being the key drivers of their knowledge. Other notable findings from this survey include: 41% of respondents stating that the ability to freedom camp was part of their motivation to visit New Zealand; a number of respondents stating that they felt a small minority of freedom campers were misbehaving which was giving the majority a bad reputation; and suggesting that smaller freedom campsites were preferable as they tended to be friendlier and better respected by campers.

Perceptions of Other Visitors

No evidence was uncovered around the perceptions of non-freedom camping visitors towards freedom camping. The perceptions of non-freedom camping visitors are often overlooked as part of this debate, yet their opinion is as important as all other stakeholders. It would be useful to develop a greater understanding of how these visitors view freedom camping, and whether they think it is a blight on their experience, or if they value it as part of New Zealand's attraction, even if it is not an activity they choose to partake in themselves.

Knowledge Gaps

Littering, defecation and anti-social behaviour are often cited as reasons contributing towards public opposition towards freedom camping and while there is evidence to suggest that anti-social behaviour can be an issue at freedom camping sites, there does not appear to be conclusive evidence that issues are necessarily caused by freedom campers (e.g. littering). Since freedom camping primarily takes place within public spaces, it may be difficult to monitor this in a cost-effective manner.

There is evidence to suggest that the general public do not necessarily oppose freedom camping, but do support limits being placed on where and for how long freedom camping can occur. However, it is likely that such opinions would differ by geography, and we would suggest that further research on public perceptions is required in order to better understand this. Many local authorities have already undertaken some indirect research on freedom camping in the form of public consultations into freedom camping bylaws, and the collection and interpretation of this data could be useful in uncovering more insight or geographical trends.

In addition, there is no clear evidence to explain the extent to which the New Zealand public values the opportunity to freedom camp, and to whether or not freedom camping by domestic visitors is seen as more acceptable than freedom camping by international visitors. It would be useful to understand whether or not New Zealanders would welcome the total prohibition of freedom camping, once presented with more information about how this would impact their own relationship with recreational areas.

There is some evidence to suggest that businesses in some areas relate freedom camping with some potential benefits. However, it would be beneficial to have a greater understanding of how local businesses and communities value freedom camping, and whether or not these communities have enjoyed any benefits from welcoming freedom campers. This would be particularly interesting in areas situated away from traditional tourist routes, as these areas could potentially benefit from being perceived as being “freedom camper friendly”.

In terms of international visitors, there is some limited evidence to suggest that the availability of freedom camping is an attractive trait to potential visitors. While there is research available on freedom camping by international visitors, there is little information available on their freedom camping experiences in New Zealand, meaning the industry does not have a full understanding of issues from their perspective. We would recommend that research be undertaken to better understand why international visitors freedom camp in New Zealand; the extent to which they find the mix of legislation and enforcing bodies confusing; and any challenges that they face when attempting to comply with freedom camping rules. There may also be some value in understanding the perceptions of non-freedom camping visitors, particularly around whether they find freedom camping off-putting, or whether they value the opportunity to freedom camp in New Zealand, even if they do not necessarily do so themselves.

There appears to be no evidence at present to suggest how freedom campers value the availability of “low-cost” camping facilities provided by private operators, local authorities and the Department of Conservation, nor does there appear to be a full understanding of how campers move between these sites. For example, there does not appear to be a clear understanding of whether these low cost sites are more appealing to freedom campers, making them a useful method of managing freedom camping, or if they are more likely to appeal to campers who would otherwise stay in commercial holiday parks.

Supply Side Issues

Available Information

Caldicott & Scherrer's 2013 study on freedom camping in Australia noted that information on supply-side issues related to freedom camping was hard to come by, and this seems to be equally true of the situation in New Zealand.

At present, there are a number of sources that provide information on campsites to freedom campers, including rankers.co.nz, the Department of Conservation website and the Campermate app. However, there does not appear to be a comprehensive census covering the total number of freedom camping sites available throughout New Zealand on a supply-side basis. While these websites/apps appear to have relatively comprehensive lists of freedom camping sites, this is understandably set up to meet visitor demands, rather than the needs of the industry, making interrogating these lists time consuming.

As a result it is difficult to calculate useful metrics, such as the total number of freedom camping sites available, the capacity of each site, how much this is growing per year, and what proportion of total camping sites in New Zealand this accounts for.

A better understanding of which particular sites were popular within particular areas may provide some insight on why people choose to freedom camp within certain areas at certain times, whilst also helping to inform planning and funding decisions around infrastructure needs within each area.

There is also limited information on the total number of campervans currently available in New Zealand. A Tourism Holdings Limited (THL) document from 2012 estimated that there were 5,770 campervans in the New Zealand rental fleet at that time, with a recommendation to reduce the size of their fleet by 25%. While THL's 2016 annual report suggests that they removed around 250 vehicles from service between 2013 and 2016, it does not mean that these vans have been removed from the market completely and these campervans could have been transferred to other operators, and/or private owners. In addition, while NZMCA membership has grown in recent years, it is not necessarily true that this represents an increase in private campervans on the road, as these new members may be existing freedom campers who have chosen to join as a result of increasing freedom camping legislation.

Going forward, it would also be useful to understand what the total number of campervans currently in service in New Zealand is; understand the proportion which are privately owned; and the proportion which are self-contained versus non-self-contained. While tracking the data for private owners would be particularly challenging, having an understanding of the proportion of non-self-contained vans currently available to rent would be helpful to understand the extent to which this sector of the market is changing.

Finally, it would likely be beneficial to both the industry and freedom campers if there were a definitive list of which local authorities currently had bylaws in place, and the extent to which they prohibit or encourage freedom campers locally. A more uniform approach may help to reduce confusion on the part of both visitors and the industry, and an initial understanding of local legislation would be a helpful first step towards this. We believe that the establishment of an online hub for local authorities by the DIA will help to better monitor and communicate this.

Significant Knowledge Gaps Identified

Caldicott et al's 2014 study noted that there was "a knowledge gap with regards to the personal choice of participating in open and relaxed freedom camping over closed and rule-bound caravan parks. Further, for policy-makers seeking evidence to make sound planning scheme decisions, he suggests 'until a method to determine the exact number of grey nomads travelling each year across Australia is formulated, understanding the full extent of their impact and the exact benefits they provide will remain problematic'". (Caldicott et al, 2014)

While this study focused upon older domestic travellers in Australia, it is likely that the same issue would be true of freedom camping in New Zealand. Without a full understanding of demand side issues (particularly motivations and expenditure) and supply side issues (such as the total availability of camping sites in New Zealand), it will be almost impossible to identify the extent to which freedom camping is causing issues, and how this can be remedied.

We would suggest that there are currently knowledge gaps in the following areas:

Profile

1. The impact that domestic tourists have on incidences of freedom camping;
2. The impact that "non-tourists" have on incidences of freedom camping;

Behaviour

3. The extent to which freedom camping behaviours differ between groups and between geographical locations;
4. The average length of stay at individual sites by freedom campers, and the extent to which this differs between groups, particularly "non-tourist" freedom campers;
5. The impact that social media and apps have on the behaviour and choices of freedom campers;
6. Whether the perception of a town/location as being "freedom camping friendly" impacts upon behaviour and site choice by freedom campers;
7. How travel patterns and transport choices of freedom campers impact upon freedom camping behaviour;
8. The impact and effectiveness of enforcement as a method of managing freedom camping, especially when compared to education;
9. The impact of prohibition on incidences of freedom camping in neighbouring districts;

Motivations

10. How freedom campers rank their motivations for freedom camping, and whether this differs between groups and between geographical locations;
11. The proportion of the freedom camping population that purposefully avoid staying at commercial holiday parks, and their motivations for doing so;

Expenditure

12. Conclusive insight on expenditure by those using freedom camping as their main form of accommodation;
13. Whether or not the benefits of freedom camping outweigh the social and economic costs of managing freedom camping at both a local and national level;
14. The extent to which freedom campers choose to substitute expenditure on accommodation for expenditure on activities, and how this differs between groups and between geographical locations;

Perceptions of Freedom Camping

15. The extent to which the general public support freedom camping, and whether this support differs between incidences of freedom camping by domestic and international visitors.
16. The extent to which local businesses and communities support freedom camping, whether or not this support is dependent upon certain criteria (e.g. it is only applicable to freedom campers in self-contained vehicles), and how this differs by geographical location;
17. The extent to which freedom campers are responsible for anti-social behaviour at freedom camping sites, as opposed to other visitors (i.e. people stopping for the day);
18. The perspective of freedom campers, particularly around their understanding of existing rules and/or challenges faced when attempting to comply with these rules;
19. Whether the prohibition of freedom camping would encourage visitors to stay at commercial campgrounds, and whether “low-cost” camping grounds are more likely to attract freedom campers or campers who would otherwise stay in commercial holiday parks;
20. The perspective of non-freedom camping tourists, particularly around whether freedom camping has a positive or negative influence on their experience;

Supply Side Issues

21. A complete list of freedom camping sites in New Zealand, the capacity of each site, and how this is changing on an annual basis;
22. The total number of campervans currently in service in New Zealand is; understand the proportion which are privately owned; and the proportion which are self-contained versus non-self-contained.

In order to resolve these gaps, we would recommend the following:

1. Develop standard methodologies to allow better comparison of visitor and expenditure data between regions;
2. Undertake research in order to better understand the scale of freedom camping by domestic visitors;
3. Undertake research in order to understand the scale of “non-tourist” freedom camping;
4. Undertake research into the behaviour of freedom campers, including: average length of stay at each site; travel patterns and preferences; access and use of information; expenditure; anti-social behaviour;
5. Undertake research in order to better understand visitor motivations for freedom camping;
6. Undertake research with other stakeholder groups, such as businesses, communities, Iwi and other tourists to understand their perceptions of freedom camping;
7. Gather data on the impact of prohibition on incidences of freedom camping, and understand what impact prohibition has on incidences of freedom camping in neighbouring areas;
8. Undertake research in order to better understand the extent to which New Zealanders support freedom camping, and identify issues which may cause them to withdraw/withhold support;
9. Undertake research in order to understand how New Zealanders value the right to freedom camp, and the extent to which they understand the impacts that prohibition of freedom camping would have on all users;
10. Undertake a nationwide count of designated freedom camping sites and their capacity, and monitor this on an annual basis going forward.

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