

**THE LORD OF THE RINGS, NEW ZEALAND, AND TOURISM:
IMAGE BUILDING WITH FILM**

W Glen Croy

*Working Paper 10/04
March 2004*

**DEPARTMENT OF MANAGEMENT
WORKING PAPER SERIES
ISSN 1327-5216**



Abstract

Film induced tourism has recently gained increased attention in the academic literature and by the tourism industry. Increasingly aware of the high international profile films get and create, Tourism New Zealand (TNZ) very quickly developed promotional material aligned with *The Lord of the Rings* (LOTR) trilogy for the films' international releases. Utilising the organic images of the films, and complementing this with induced images in advertising and the TNZ tourist website, *100% Pure New Zealand*, TNZ hoped for the explicit link to be drawn between the scenes in LOTR and New Zealand. TNZ commissioned NFO New Zealand to undertake research to identify the actual Post Production Effects (PPE) of the films on New Zealand's international tourism image, and more specifically the impact on awareness, motivations and behaviour. The results indicate a small impact of the films on tourist behaviour (1%). With a reinterpretation of the results this working paper provides further detail about what the results identified. This paper also identifies links between LOTR, and how the film has modified the destination image of New Zealand.

Acknowledgement is made of the kind support of Tourism New Zealand and NFO New Zealand in supplying the data from the Visitor Information Centre survey data used in ***Lord of the Rings Market Research Summary Report***

This paper was presented at CAUTHE 2004: Creating Tourism Knowledge, The University of Queensland, Brisbane, Australia, February 2004

This paper is a work in progress. Material in the paper cannot be used without permission of the author.

THE LORD OF THE RINGS, NEW ZEALAND, AND TOURISM: IMAGE BUILDING WITH FILM

INTRODUCTION

Two American families, one on either side of the tracks, they both face impossible hurdles and yet overcome them to live happily ever after. Even with the dramatically different lifestyles and economic status, both families have the latest *Sony* television, on which they watch the game with a cold *Budweiser*. Prior to the game they went to the local shop, in their *Nike* gear, and picked up the *Bud's* in their *General Motors* car (unless it breaks down then it is Japanese or Korean). Whilst at the shop they also got a couple of tubes of *Pringles* chips and a few cans *Coca Cola*. After the game, where their team wins, the family have a bonding session where they all smoke a few *Marlboros*. The American life and dream, or so the movies would have you believe. This belies the fact that the movie was actually filmed in Canada, by Canadian's, starring Australians, financially supported by Japanese, and the only American involvement was the product placement. The advent of runaway productions, international movie stars, and product placement has grown in prominence and importance for the film industry. These issues have also increased for those using the industry, so much so that the changes to marketing and promotion have redefined "what an ad is and where it runs" drawing focus to the stealth messages of product placement and celebrity use (Belch and Belch 1998: viii). The influence of product placements has been rumoured as immense, with for example concerned groups trying to stop the stars smoking in films due to their influence on the audience. Nonetheless, the new area for promotion is not product placement but place placement.

Place placement has been built on the back of runaway production and the identification of the economic impact film production can have on a location and country. There is now a very competitive environment trying to seduce film producers to make their films in specific locations. There are over 150 film commissions world wide, and 50 in America alone. In the quest for the positive economic impact of production each of these commissions is actively promoting their place to be the location of any and every film, television show, and advertisement. The presenting of a place, in film especially has also been identified as a way to build the film industry by showing off the country's or location's wears to other film producers. Additionally, the place placement in film has been shown to have Post Production Effects (PPE) for the location by way of the growth of tourism. Thus, by a place featuring in a film can develop two industries, film and tourism.

With the PPE of film, associations with these organic sources of image are increasingly being used to build a tourism image. The origins of the active use of film associated images for national tourism promotion arguably started with the use of *Crocodile Dundee* by Australia. This was of course within the context of Australian events; the Bi-Centenary and the Brisbane hosted World Expo. Thus Australia used both events and movies in efforts to build their international tourism image, and very successfully. In fact between 1981 and 1988 there was a 20.5 percent per annum increase in tourists from the USA, additionally 30 percent of USA travel agents stated *Crocodile Dundee* as the influencing factor for increased tourism to Australia during the 1980s (Riley & van Doren, 1992; Riley, 1994). This paper follows similar attempts to build an international tourism image. Especially this paper assesses the process of image building in tourism, and its role in destination choice. To do this, first a model of image building and its role in destination selection and satisfaction will be presented. Second, the case of PPE and New Zealand will be developed by introducing film in New Zealand and tourism in New Zealand, before focusing on New Zealand film tourism. Third, results from research undertaken by NFO New Zealand for Tourism New Zealand will be re-presented to identify the role of *The Lord of the Rings* (LOTR) films on New Zealand's tourism image. The paper will be concluded addressing issues in the research, results and outcomes and indicating future foci for the study of film tourism in New Zealand.

IMAGE BUILDING

The process of image building and its influence on decision making has been developed in the literature, though in parts. Models sourced from the tourism literature reflect the role of general (organic agents) and specific (induced agents) media in the provision of an image of a destination. Figure 1 (over page), depicting the roles and process, incorporates Hammitt's (1980) recreation multiphase experience, Gartner's (1993) image formation agents, Woodside and Sherrel's (1977) destination choice process, an experiential satisfaction model, and benefit based management approaches (Burns, Driver, Lee, Anderson, and Brown 1994). This model was built from the deconstruction of overall satisfaction into the five phases of the visitor experience (anticipation, travel-to, on-site, travel-back, and recollection) and introducing the images specific to each phase, and then re-constructing the experience. The image agents introduced were shown to be the basis of motivation (organic), decision-making (induced), experiential satisfaction (real), and benefits of the five-phase experience.

Figure 1: Image Building and as the Basis to the Satisfying Experience

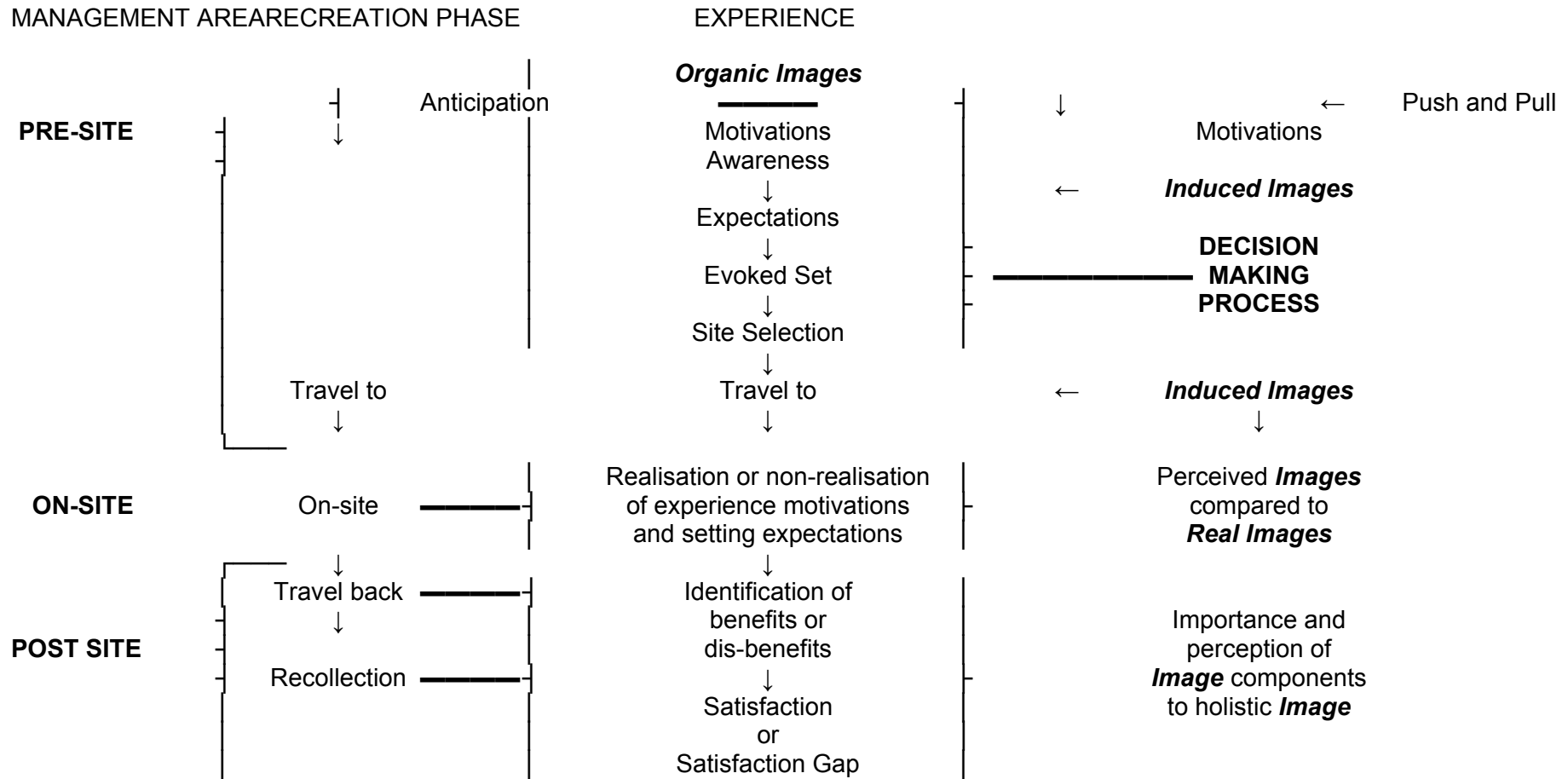


Figure 1 shows that initial destination awareness and motivation are created by organic images. These organic images are derived from the environment of personal psychological and social events, and stimulus factors generated and derived from the day-to-day environment. At this stage, in Figure 1, it has been identified that word-of-mouth, and books, movies and news were the two most important types of information sources (Baloglu and McCleary 1999). This is further clarified in that the sources of images are increasingly from the general media, as compared to personal experience or from tourism advertising (Meyrowitz 1985; Butler 1990; Altheide 1997; Turner 1999; Nielsen 2001). The induced agents depicted in Figure 1 are that of tourism advertising provided by the destination, through their own and other sources.

Of course, an important consideration for destination managers is that an appropriate image or representation of place is needed to emphasise the destination in the consumer market, as it has been shown that locations with positive images are more likely to be considered as destinations (Woodside and Lysonski 1989). As these images are first provided through organic sources, and considering media images have greater credibility than those supplied by the destination in advertising, utilising media images to build destination image reduces the influence and control destination managers have on the images of their destination. This consideration taken in the view that it has additionally been identified that image was dependent on the effects of the imagery on memory, incidental learning, problem framing, intentions and purchase timing, and as a consumption experience (MacInnis and Price, 1987). Within this was that “memory was greatest for pictures, less for concrete words, and least for abstract words” (MacInnis and Price 1987: 477). Thus, reflecting the importance of the need for stealth advertising messages, one of the sources of media images gaining increasing note in the tourism literature is that of the feature film (Tooke and Baker 1996; Riley, Baker, and Van Doren 1998; Busby and Klug 2001).

In the tourism literature, the role of the feature film has been recognised as a hallmark event, as a tourism-inducing event, and as tourism promotion. The leisure and cultural geography literature has also noted the increasing role of the feature films and the media stating that the media is also a “definer of reality” (Altheide 1997: 18). The effects of film creating or enhancing images of place and creating tourist visitation have been reported (Tooke and Baker 1996; Riley, Baker, and Van Doren 1998; Beeton, 2001; Busby and Klug 2001). What has been identified is that films, and other fictional media, create associations with the stars, stories and location presented. These associations induce visitors to the location to re-interpret the events and to become part of the lives of those depicted on screen and in print (Croy and Walker, 2004).

In summary, media in general and in particular the fictional media is a source of organic images. The fictional media create links between place and possible visitors, largely through the personalisation of the stories told through these mediums. In cases these stories form very compelling holistic images of place. These images are noted to be dramatic tourism inducing events. Building image associations with film icons has been used to promote place and to actively induce tourism. Locations have recently promoted their use as television and film production sites, though this has been noted to be more for the initial economic impact of film production. Nonetheless, the PPE effects of being on screen are also increasingly identified. With this identification feature films especially, with their growing worldwide audiences, are being purposefully and actively used as promotional tools for tourism. The use of films in this manner is creating a range of impacts on locations. Nonetheless, for image building it is the dramatic influence of these organic agents on destination image that is of note.

NEW ZEALAND CASE

This section will provide a background and context for the re-presentation of the NFO New Zealand (2003) and Tourism New Zealand study *Lord of the Rings Market Research Summary Report*. First film in New Zealand will be introduced identifying the increased importance of the industry to New Zealand. Second, tourism in New Zealand will be introduced and the role of organic images in Tourism New Zealand's image building strategy. Third, film tourism in New Zealand will be discussed, and especially the recent rise and use of film in the image building strategy.

Film in New Zealand

The film industry of New Zealand has recently received a rather large boost thanks to international productions and the image this has created. Whilst New Zealand is not identified as an international film production location of scale, in recent years it has been utilised more frequently. Consequently, the economic significance of the film industry in New Zealand has increased in the 1990s and reputedly generated \$NZ500 million in foreign exchange in the 1999-2000 financial year (SPADA, 2001). This was a dramatic increase from the \$86 million foreign exchange earned in 1995 (Clarke, 2001). In fact it has been identified that the New Zealand creative sector, including film production, accounts for three percent of New Zealand's GDP (Anderton, 2002). Additionally, the creative sector had grown nearly nine percent in 2001-2, almost three times as much as the rest of the New Zealand economy (Anderton, 2002), and largely due to hosted international film production. The majority of this money was from large Hollywood productions that have been located in New Zealand. *Vertical Limit*, *LOTR* trilogy, and *The Last Samurai* are the three most well known.

The positive economic impacts have also been the focus of the New Zealand Government's 2001-3 protracted, contradictory and controversial discussion and decision to implement the Large Budget Screen Production Grant (LBSPG) scheme (Anderton 2003; BBC, 2003; Otago Daily Times, 2003a, b). The LBSPG's basic premise is to entice international film productions to New Zealand, and offers 12.5 percent tax break to which spend more than \$NZ50m. There was also a package for film productions spending over \$15 million, though only if 70 percent of spending was in New Zealand (One News, 2003). This has largely been on the back of Peter Jackson's bringing the \$US350 million production of *LOTR* to New Zealand, the tax break he achieved, the desire to sustain the industry, and to maintain the image of New Zealand as a film producing country. It was also developed to counter Australia's similar scheme, utilising New Zealand's marginally lower exchange rate (BBC, 2003). This move is expected to guarantee another three feature films for New Zealand, including Peter Jackson's remake of *King Kong* and Andrew Adamson production of *The Lion, the Witch and the Wardrobe*, and possibly *The Chronicles of Narnia*. This also coincides with the growing phenomena of runaway production.

Tourism in New Zealand

As compared to the burgeoning New Zealand film industry, tourism has been one of the original industries in New Zealand, and, as in a number of countries around the world, New Zealand is placing increasing emphasise on tourism to develop the economy (Ministry of Tourism, 2004). New Zealand hosted over 2 million international tourists in the year ended October 2003 (Tourism New Zealand, 2004a). Combined with over 16 million over night domestic visitors in 2001 (Tourism Research Council New Zealand, 2004) New Zealand has a substantial tourism industry in a country of just 4 million people. In fact the New Zealand tourism industry generates almost 10 percent of New Zealand's GDP with approximately \$13 billion in domestic and international tourism earnings (Ministry of Tourism, 2004).

With the size, importance and impact of the industry the Ministry of Tourism, Tourism New Zealand (TNZ), and the Tourism Industry Association of New Zealand (TIANZ) have taken a more active role in the development and management of the industry as a whole. In 2001 the *New Zealand Tourism Strategy 2010* was released and within it identified the future direction of New Zealand tourism (Tourism Strategy Group, 2001). There were four key principles leading this direction. First, tourism was needed to be sustainable, and within this securing and conserving a long term future. Second, it was also identified to be internationally competitive and this meant significantly marketing and managing a world class visitor experience. The industry was identified to need increased efficiency and effectiveness, basically translated to worker smarter. Finally, that the tourism industry provided a financial contribution to New Zealand.

In relation to the second principle TNZ has, in addition to direct marketing initiatives (induced images), implemented complementary programmes of international media hosting and leveraging off existing images and events (organic images). This image building and promotion process effectively utilises TNZ's limited financial resources by using other groups' resources to provide the images and then creating association to New Zealand. Specifically, the results of hosting media are stories in the target markets' general media explicitly about New Zealand, building and enhancing the awareness of New Zealand and motivating the audience to visit. Association with existing images in films, such as *LOTR* and *Whale Rider*, and events, such as the *America's Cup* and the *Speight's Coast to Coast*, reflects and reinforces the core images that TNZ are promoting and build a more complex image, explicitly of New Zealand, in the audiences' mind. The result of this image association creates increased complexity and hence reliability of the audiences' images of New Zealand for basing a destination choice decision. The programmes of media hosting and association with existing images utilise organic (autonomous) agents of image formation, being the general media and word-of-mouth. These agents provide a perceived credibility that could not be provided with direct marketing efforts, or induced agents (Gartner, 1993). Additionally, these programmes obtain much more market coverage than could be obtain with the direct initiatives.

Film (and) Tourism in New Zealand

In New Zealand the anecdotal effects of film on tourism have also been noted. The first film to create international tourism awareness of New Zealand was the hang-gliding and extreme skiing film *Off the Edge*, creating a lot of exposure for the adventure tourism industry (Bruce, 2001). Additionally, *The Piano*, the critically acclaimed film by Jane Campion, was used in international tourism advertising (Figure 2), though not before discussion of how real the images in the film would be perceived (Hill, 1994; NZPA, 1994). *The Piano* was positive for tourism and the Waitakere area has also achieved an international profile as a film production area (Hill, 1994; Auckland Regional Council, 2000). Karekare Beach, where the piano was left in the film, as depicted in the poster, is now a film induced tourism site receiving visitors from around the world (Thompson, 2000), as exemplified in a later film set in the area *Topless Women Talk about Their Lives*.

Figure 2: *The Piano* Used in New Zealand Promotional Poster



Source: Tourism New Zealand 2003

Increasingly aware of the high international profile films get and create, TNZ very quickly developed promotional material aligned with *LOTR* trilogy for the films' international releases. Utilising the organic images of the films, and complementing this with induced images in advertising and the TNZ tourist website, *100% Pure New Zealand*, TNZ hoped for the explicit link to be drawn between the scenes in *LOTR* and New Zealand. The results, it was planned, would enhance awareness of New Zealand and create a more complex image of the country on which to base decisions. This was additionally complemented with extensive international media hosting, resulting in numerous mentions of New Zealand being the location of *LOTR* films in magazine articles and television shows. In these efforts it was reported that for the release of the first film £1.27m was spent to promote New Zealand as Middle Earth (BBC, 2001). Over 2002 and 2003 \$1.5million was provided by the Government to TNZ for promotions related to the *America's Cup* and *LOTR*. The impacts of this investment have been noted by TNZ (2003: 6) as "invaluable for the tourism profile of New Zealand". Overall, the New Zealand Government had budgeted \$9 million for the promotion of New Zealand specifically in connection to the *America's Cup* and *LOTR* (Clarke, 2001).

These advertisements and promotional strategies have been in place since the release of *The Fellowship of the Ring* and are still a main feature of the website, Figure 3. *LOTR* has been attributed to peak usage rates of the TNZ website since the release of the first film (TNZ, 2002). The *LOTR* films have also been reported to have attracted "tens of thousands of fans ... to the twin antipodal islands to see the movie locales first-hand" (Haupt, 2003). Following the success of using *LOTR*, TNZ has prominently placed films shot in New Zealand on their website, including *The Last Samurai*, *Whale Rider*, and the recently released *Perfect Strangers*. Locations of the film sites and tour routes of the movies are also identified on the website.

Figure 3: Films on the 'Front Page' of the TNZ tourist website



Source: Tourism New Zealand 2004b

Nonetheless, the results of using *LOTR* as an image building tool are largely anecdotal, hence *LOTR* has attracted a number of research reports. These reports have been largely to justify the Government's investment in the films, and to obtain funding for future film productions. The report for the New Zealand Film Commission, *Scoping the Lasting Effects of The Lord of the Rings*, was largely focused on the direct economic impacts of the films, and inline for who the report was written for is largely focused on the film industry. Nonetheless, a brief review of Walker's (2002) thesis does identify a link with tourism, though for the purpose of the report may have underplayed a significant lasting effect of film

on the New Zealand economy. In this vein, TNZ commissioned NFO New Zealand to implement further research to identify the influence of *LOTR* on international visitors to New Zealand and those searching on TNZ's tourism information website. Leading the research was to understand the extent to which *LOTR* influenced visitors to come to New Zealand. The key objective of the research was therefore to identify the level of awareness and resulting impact of *LOTR* on current and potential international visitors' travel decision-making. This report would specifically identify and measure the influence of *LOTR* as an image building tool and support the above noted anecdotal findings.

In order to gather this information, questions were inserted into two separate surveys during February and March 2003. It must be noted that this was only one year after the release of the first film of the trilogy, *The Fellowship of the Ring*, and just after the international release of *The Two Towers*. It has also been noted in TNZ research that generally there is a destination selection time by international visitors of more than 6 to 12 months prior to travel (TNZ, 2004c). The two surveys the questions were inserted in were first the pre-existing Visitor Information Network annual face-to-face survey of users of Visitor Information Centres (n=774 international visitors). Second, an existing online survey on the purenz.com website (n=916 potential international visitors). NFO New Zealand (2003) produced a four page report summarising the research findings: *Lord of the Rings Market Research Summary Report*. The main findings and conclusions of the report were most visitors and potential visitors were aware of the *LOTR* films. A majority of visitors and potential visitors had watched one of the films, and 95 percent of current visitors knew that *LOTR* was filmed in New Zealand.

The impacts of the *LOTR* films were that 9 percent of visitors indicated that *LOTR* was one reason, though not the main reason, to visit New Zealand, and 0.3 percent stated that *LOTR* was the main reason for visiting New Zealand. Sixty-five percent of potential visitors noted that they were more likely to visit New Zealand as a result of the films or the associated publicity. The scenery presented in the films and publicity was the main influencing factor. It was additionally identified that the films raised awareness of New Zealand, and this increased motivation or likelihood to visit New Zealand.

CASE STUDY: New Zealand's Interactive Traveller

One of the key outcomes from *New Zealand Tourism Strategy 2010* for TNZ, New Zealand's international tourism marketing organisation, was to focus their marketing the ideal tourist: 'the interactive traveller' (Rotherham & Hirschberg, 2003; TNZ, 2004d). This included the four principles above, and reinforced the change in focus over the previous decade to on the value of tourists, rather than the number of tourists. In general TNZ (2004e: 1) define the interactive travellers as "regular international travellers who consume a wide range of tourism products and services. They are travellers who seek out new experiences that involve engagement and interaction, and they demonstrate respect for natural, social and cultural environments". The interactive traveller's key reason to visit New Zealand is to interact with the landscape, though there are commonalities in their collective behaviours (Table 1). A few features of this collective behaviour is that they are more likely got to the cinema, as well as other contemporary and historical cultural experiences, and they are also more likely to be high users of technology (TNZ, 2004d).

Table 1: Characteristics of the Interactive Traveller

- 25-34 or 50-64 years
- Without children – haven't had or empty nesters
- Up-to-date with news and current affairs
- Contemporary and historic cultural experiences
- High users of technology
- Healthy
- Liberal
- Entertain at home
- Enjoy challenging situations
- Enjoy fine wine and cuisine
- High levels of disposable income
- Have influence on their peer group

Source: Tourism New Zealand, 2004e

TNZ implemented research projects on identifying and targeting the interactive traveller. One of these projects identified the decision-making process of interactive travellers (TNZ, 2004c). From this research TNZ identified interactive travellers had relatively short planning times, and placed importance on technology in this process. Nonetheless, friends and family were the most important source of information and recommendations. The main focus in the pre-site visit was searching for places to visit and things to do, rather than places to stay and how to get around, and was identified as a key phase in the holiday experience. Contrastingly, the decisions made before visiting the destination are for accommodation and transport. Again a lot of these plans are investigated and confirmed via websites. Basically, the icons of the destination are identified before travelling and the holiday is based around these icons. Then the accommodation and transport is booked before travelling, to get to the first icon at least. Once in the country, there is much more reliance on the information collected prior to travelling and information from locals and information centres to get to the other pre-trip identified icons.

The interactive traveller in the pre-site stages collects amounts of information, mainly from the internet about a proposed destination (induced sources). These sources provide expectations of the icons of the destination and a general travel plan is created. When on-site the extensive expectations are compared to the real experience and this would either confirm or contradict expectations. At this stage many interactive travellers have the capacity to change their travel behaviour due to the low levels of pre-confirmed arrangements, and thus can dramatically modify their overall satisfaction levels, as compare to a pre-determined trip without the flexibility to modify dissatisfying travel experiences.

LOTR and other films are very prominent on the TNZ website, as noted above, and websites are a primary source of travel information. Even though there may be a perceived lack of credibility with the website, due to its induced agent nature, it would be likely that the films, and especially *LOTR*, will become destination icons of New Zealand, and consequently be a feature of a general travel plan. Additionally *LOTR* is often mentioned in other information sources regarding New Zealand, reinforcing not only the iconic feature, though also the credibility. Thus the *LOTR* locations and tours of the movies identified on the website, match well with the icon features noted by the TNZ decision making research and assistance in identifying the information required by the interactive traveller.

Nonetheless, what was missed in the TNZ research on interactive travellers was what sparks the initial destination motivation and choice, the organic images that create or influence the awareness of and motivation to visit a destination. The Figure 1 model

portrays the importance of organic images in the initial image formation and motivation to visit a site. The model also shows how organic images create awareness, availability and expectations, along with induced images, and form the basis of the decision-making process. It is these organic images that are the most important in the formation of an evaluative image that decides on a specific destination to visit (MacInnis & Price, 1987; Baloglu & McCleary, 1999). With the characteristic of watching films, and it would be assumed based on the other characteristics, of watching critically acclaimed films, the *LOTR* trilogy would have been a 'must see'. Thus *LOTR*, for the ideal interactive traveller, would have also been a source of the motivating and image enhancing organic image. This would be especially reinforced by *LOTR* and New Zealand coverage in the general media targeted, by TNZ through the international media hosting programme to the interactive traveller.

RE-PRESENTING THE RESULTS

A selection of variables of the face-to-face survey was kindly provided by TNZ and NFO New Zealand so that the author could undertake a more detailed analysis of the information contained. Especially of interest to the author was how the *LOTR* films created motivations and awareness of New Zealand and the influence of these in the pre-site anticipation phase of travel, and how these translated into the decision to visit New Zealand. With the original aim and objectives of the survey it must be noted that there are some limitations for analysis for this new perspective; these issues will be discussed in the conclusion. The analysis of the Visitor Information Network (VIN) annual face-to-face survey (n=774 international visitors) will be presented in three parts. First, the demographics of the sample and information about their travel whilst in New Zealand will be presented to provide a context for the results and a comparison to New Zealand's international visitors. Second, the awareness of the *LOTR* films and the awareness of the filming of *LOTR* in New Zealand will be presented. This section will provide evidence of the success of the film in creating exposure and evidence of TNZ's programme of associating the *LOTR* films to New Zealand. Third, the influence of the *LOTR* films on destination selection will be presented. These results will identify the flow of the Figure 1 model from organic image exposure, in the form of the films and associated general media. The results will then imply the role of the induced images, through to destination choice.

Demographic and Travel Profile

Table 2 presents the demographic characteristics of the VIN face-to-face survey sample. Table 1 also provides a comparison to the demographic profile of New Zealand's international visitors as obtained from the *International Visitor Arrivals* (IVA) (Statistics New Zealand, 2003). As can be identified slightly more females responded. Fifty-five percent of respondents under 34 years and 22 percent were over 55 years. The age profile of the sample differs greatly from the international visitor population, except for the older age cohorts. A large proportion of respondents were from the United Kingdom (32%), three times more than any other country. Thus the country of origin did not reflect overall international tourist characteristics to New Zealand, where traditionally Australians would normally out number any other visitor group 3 to 1 at the least. Just over 50 percent of respondents came from countries with English as a first language. Nonetheless, this should not limit the awareness of *LOTR* as the books and films of *LOTR* have been translated and released in many countries around the world. This is exemplified by New Line Cinema's 18 official *LOTR* websites catering for different languages (New Line Cinema, 2004).

Table 2: Demographic profile of respondents to the VIN face-to-face survey

	Frequency	Percent	IVA YE Nov 2003*
Gender			
Male	339	43.8	51.8
Female	435	56.2	48.2
Total	774	100.0	100.0
Age			
Under 15	-	-	8.3
15-24	186	24.0	12.7
25-34	240	31.0	21.1
35-44	102	13.2	17.6
45-54	72	9.3	17.1
55-64	105	13.6	14.6
65+	66	8.5	8.5
Refused	3	0.4	-
Total	774	100.0	100.0
Country of origin			
UK	250	32.3	12.5
Australia	78	10.1	33.0
USA	71	9.2	10.1
Canada	56	7.2	1.9
Germany	52	6.7	2.5
Netherlands	42	5.4	1.3
Switzerland	36	4.7	0.8
Japan	30	3.9	7.3
Israel	30	3.9	0.3
Sweden	20	2.6	0.6
Korea	16	2.1	5.4
France	15	1.9	0.7
Other Europe	38	4.8	-
Other Asia	29	3.9	-
Other	11	1.4	-
Total	774	100.0	76.4

* Source TNZ 2004f and Statistics New Zealand 2003

Noting the differences in the demographic profile of the sample to the IVA, the travel profile will now be presented. The inherent sampling difficulties of surveying at visitor information centres lead to certain groups being under represented; this may also explain some differences in the demographic profiles. Undertaking surveys at visitor information centres inherently under samples repeat visitors, or those that have already obtained information from other sources such as guide books or accommodation providers. Information centre surveys also inherently under sample those visiting friends and relatives (VFR), or those in organised tours, as the hosting group are commonly used as the source of information. Again, business travellers are also generally under represented in visitor information centre surveys.

The travel behaviour of the sample and a comparison to the *International Visitor Survey* (IVS) (NFO New Zealand, 2002) is presented in Table 3. As would be expected, the purpose of visit is largely focused on holiday and vacation visitors, under representing VFR and business travellers. First time visitors to New Zealand additionally make up a dominate part of the sample, over represented as compared to the IVS. The differences between the high levels first time visitors could be in part explained by repeat visitors knowing about the

area being visited, and thus not going to information centres. Also this could be explained, in part, by now knowing people in New Zealand from previous trips that they have other information sources at their disposal. Those surveyed also were predominately travelling alone, as couples or with friends. This does in part reflect the IVS travel party, though over states the couple and friends, and understates family groups.

Table 3: Respondents New Zealand travel information

	Frequency	Percent	IVS YE Sep 2002 [^]
Purpose of visit			
Holiday/Vacation	645	83.3	58
Visit friends/relatives	81	10.5	18
Business	14	1.8	15
Education/Study	29	3.7	+
Other	5	0.6	10
Total	774	100.0	101 [#]
First visit to NZ			IVS YE Jun 2002 [^]
First visit	580	74.9	55.9
Not first visit	194	25.1	44.1
Total	774	100.0	100.0
People travelled with in NZ			
Travelled alone	255	32.9	34.8
Couple	309	39.9	28.5
Family group	46	5.9	11.3
Friends	122	15.8	8.3
Business associates	3	0.4	4.9
Family and friends	16	2.1	1.3
Two or more couples	10	1.3	*
Tour groups	10	1.3	8.8
School trip/Student group	3	0.4	1.6
Total	774	100.0	99.5 [#]

+ Not noted

Does not total 100 due to rounding or unavailable data

* Number suppressed, based on sample size of less than 30 respondents

[^] Source NFO New Zealand, 2002; Tourism New Zealand, 2004^f

Considering the demographic and travel profile of those surveyed, and especially the differences to the New Zealand international visitor, the rest of this section will discuss the awareness and influence of the *LOTR* films.

Awareness

Nearly all of the international visitors surveyed were aware of *LOTR* films, Table 4. Only seven percent were not aware of either *The Fellowship of the Ring* or *The Two Towers*. The lower percentage aware of *The Two Towers* could be explained by the timing of the survey, just after the film's release. This is also represented in the numbers that have watched each of the films. Three quarters of those surveyed had watched *The Fellowship of the Ring*, whilst just over half had watched *The Two Towers*. The results also show that those that have watched *The Two Towers* have watched both films.

Table 4: Awareness and Watched LOTR

	Count	Pct of Cases
Aware of <i>The Lord of the Rings</i>		
Yes - <i>The Fellowship of the Ring</i>	720	93.0
Yes - <i>The Two Towers</i>	663	85.7
No, not aware of <i>The Lord of the Rings</i>	53	6.8
Total	1,436	185.5 [#]
Watched <i>The Lord of the Rings</i>		
Yes - <i>The Fellowship of the Ring</i>	537	74.5
Yes - <i>The Two Towers</i>	389	54.0
No, did not watch <i>The Lord of the Rings</i>	167	23.2
Total	1,093	151.6 [#]

[#] Totals more than 100 due to multiple responses

Of the international visitors, 89 percent were aware LOTR was made in New Zealand before they arrived in the country. This translates to 95 percent of those that are aware of the LOTR films knew that they were made in New Zealand before they arrived. This also indicates that the association TNZ has created between the films and the place, New Zealand, with the international media hosting programme has worked extremely well. It must be additionally noted that in the many interviews (not in New Zealand) with the stars and those behind the camera did explicitly talk about New Zealand, and very positively as well. What these results do indicate is that the organic agent of the films did create a memorable image. The association then created between the LOTR and New Zealand in the general media, another organic agent, was also very effective and complemented the memorable images of the films. The image was additionally inherently positive, as reflected in the fact that those aware of the films, and that they were filmed in New Zealand still decided to visit. This indicates that the LOTR films and the general media coverage added to the complexity of the image of New Zealand provided additional grounds or basis for a decision to be made, not necessarily a specific reason or motivation to visit.

Table 5: Aware LOTR Films Made In New Zealand

	Frequency	Percent
Aware films made in NZ	686	88.6
Not aware films made in NZ	34	4.4
Don't know	1	0.1
Not aware of films	53	6.8
Total	774	100.0

What this part of the results did not identify is the source of the information about LOTR films, nor where it was identified that the films were shot in New Zealand. Thus, some of this information may have also been sourced from induced sources, such as the website mentioned above. Nonetheless, the above indications are still valid, and would in fact further emphasise the development of the link between the films and New Zealand in inducing people to check the website. On the other hand, people thinking of visiting a long haul destination, such as New Zealand, would generally complete a detailed information search, including the internet. On this search they would have found out, if they did not already know, that LOTR was filmed in New Zealand due to its prominent placement on the TNZ website, as noted above, and the LOTR coverage in general media articles about New Zealand.

The Influence of the *LOTR* Films on Destination Selection

Though *LOTR* enhanced the complexity of the image of New Zealand, and thus informed the decision making process, no one noted that *LOTR* was the only reason for visiting New Zealand. In fact it was not noted as a decision making factor at all by many. Nonetheless, two people stated *LOTR* was the main reason for visiting New Zealand, Table 6. Of the two, one had worked on the film, and the other wanted to see if scenery was like in the film and to see where the film was made. An additional 64 people stated *LOTR* was a reason, though not the main reason. In total 8.6 percent of the sample were influenced, to a degree, to visit New Zealand due to the *LOTR* films.

Table 6: Were the *LOTR* Films the Reason for Travelling to New Zealand

	Frequency	Percent
Only reason	0	0.0
Main reason	2	0.3
One reason - not main	64	8.3
Not a reason	620	80.1
No response	88	11.4
Total	774	100.0

The question in the survey did limit the frame of responses to those in the table, and thus other possible roles of the films in the decision making process were not assessed. As noted above, these limitations will be further discussed in the conclusion. Nonetheless, those 66 international visitors that stated that *LOTR* was a reason for visiting New Zealand were then asked what specifically about the films encouraged them to visit, Table 7. The scenery presented in the films was identified as the major motivator. Though there were also a proportion of *LOTR* fans.

Table 7: Specifically What about the *LOTR* Films Encouraged you to Visit New Zealand

What encouraged to visit New Zealand	Frequency	Pct of Cases
The scenery (Unspecified)	57	86.4
See if scenery like it is in film	12	18.2
Fan/Love <i>The Lord of The Ring</i>	9	13.6
To see where the film was made	8	12.1
Just raised my awareness of NZ	7	10.6
Working on <i>The Lord of the Rings</i>	1	1.5
Don't know	1	1.5
Total	95	143.9 [#]

[#] Totals more than 100 due to multiple responses

Again this question, although directed to be open ended, may underplay the role of the film in the creation of motivations and in the decision-making process. The depth and time requirement to identify this depth was not available in the implementation of this long survey. The scenery responses do reflect the core images of TNZ promotional material.

CONCLUSIONS

The development of place placement in films is increasing. There is also growing awareness of PPE and especially for tourism. Nonetheless, the process of film generating PPE is generally not appreciated and thus understated when assessing the effects of films on a destination. It has been identified that films create awareness and motivations to visit a destination. They also build on the existing images of a destination and enhance the complexity of that image. The images held are the basis of expectations, and hence selection of a destination from a selection in the evoked set. This selection or decision is based on the destination's ability to satisfy motivations. The matching or comparison of expectations to experience then provides levels of satisfaction or a satisfaction gap.

The role of organic agents in image building, decision making and in satisfaction has become increasingly important in New Zealand where, with the growing and internationally successful film industry, the use of film images has increased for tourism promotion. Additionally, the *LOTR* films have become an inherent part of any general media story about New Zealand. This association of *LOTR* with New Zealand was substantially aided by TNZ's international media hosting programme. The use of the films and the general media articles, as organic images, was complemented by TNZ direct promotional efforts using images and associations with the films; induced images. Nonetheless, reports on the influence of the films on the image of New Zealand were largely anecdotal. In efforts to identify the influence or PPE of *LOTR* on New Zealand's image and tourism TNZ and NFO New Zealand implemented a study. The report showed a direct influence of *LOTR* on travel behaviour, though at relatively low levels. The data from the VIN face-to-face survey was kindly supplied to the author for further analysis. From the analysis it was identified that, though there were differences between the sample and New Zealand's international visitors' profile, the films indeed built and enhance New Zealand's tourism image. This enhancement of the image, through these organic and induced sources, was subsequently converted into travel behaviour, where visitors noted the role of *LOTR* as a decision making factor.

As noted in the presentation of results, there were some issues and assumptions made in the survey and its implementation that may have not identified the full role of *LOTR* in the building of New Zealand's international image. There were not many questions focused on *LOTR* in the long survey, additionally they were largely summative. By summative it is meant that the questions summarised or assumed precursors in the question, these were then indicated by the response though could not be concluded, thus the results summarised a number of responses in one question. From this issue, as noted above, the results indicate a strong link between *LOTR* and New Zealand, as shown by the awareness of the films being shot in New Zealand. A direct link between the films is also identified. Though the link between the *LOTR* and travel behaviour to New Zealand may be underplayed by not identifying lower though still significant levels of importance in the decision making process.

On these issues, and as relayed through the above discussion, the research was included in a much larger pre-existing survey. The timing and existence of the Visitor Information Centre (VIC) survey fitted well with the timeframe the information need was identified. Thus the VIC survey was also the most logical and expedient move to gain access to international visitors. This is also in an environment with increased security, especially at locations where international visitor congregate such as airports, which increasingly limits access to larger numbers of visitors for the purpose of research. Extending the individual survey timeframe was also limited so not to deter potential interviewees. The survey was also responsive to a need to find information about the impacts of the image building strategy within a short timeframe. This reactive need, and to fit within an existing survey on a limited budget, limited the ability to fully devise and investigate the role of *LOTR* in building New Zealand's international tourism image. Nonetheless in a longer term initiative by TNZ they continue to monitor the role of *LOTR* through the International Visitor Survey (IVS), though again these

are limited by tight timeframes and limited ability to obtain detailed information from respondents.

In conclusion, the results indicate a significant link between *LOTR* and the international image of New Zealand. Nonetheless, the films' role in building this image is still under-defined. The implementation of a programme of complementary image building agents by TNZ has been a significant investment in resources and image, and one that has arguably paid off. The images presented in the *LOTR* films are indicatively positive for international travellers, and the explicit association with New Zealand developed in the general media and direct promotional materials has supported the positive image. Overall, this indicates that *LOTR* and the TNZ programme have been good for New Zealand tourism. This also indicates that there is more research require to further determine exactly how good *LOTR* has been for New Zealand tourism, and what specific impact *LOTR* has had on the image of New Zealand as a tourism destination. Future research should specifically assess how *LOTR* enhances New Zealand's evaluative image, and at what level of importance this is in travellers' decision making factors. Research should also determine the translation of this enhanced image into travel behaviour. This may also include change in behaviour in the destination, such as visiting *LOTR* film sites, though not an overall determinate of the visit to New Zealand. This research will need to take a longer term view, especially considering the time taken in the decision making process, and the staggered time of release and exposure *LOTR* will have.

REFERENCES

- Altheide, D.L. (1997) Media Participation in Everyday Life. *Leisure Sciences*. 19. 17-29.
- Anderton, J. (2002, 15th November) NZ Film and Television Industry Conference. *Beehive.govt.nz*. Retrieved 9th January 2004 from <http://www.beehive.govt.nz/ViewDocument.cfm?DocumentID=15481>.
- Anderton, J. (2003, 30th June) Film and Television Industry Receives Commitment. *Beehive.govt.nz*. Retrieved 9th January 2004 from <http://www.beehive.govt.nz/ViewDocument.cfm?DocumentID=17193>.
- Auckland Regional Council (2000) *Auckland Regional Council: Waitakere Ranges - Regional Park*. Auckland: Auckland Regional Council.
- Baloglu, S. and McCleary, K.W. (1999) A Model of Destination Image Formation. *Annals of Tourism Research*. 26 (4): 868-897.
- BBC (2001, 22nd November) Rings Tickets Prove Hot Property (Electronic Version). *BBC News: UK Edition*. Retrieved 9th January 2004 from <http://news.bbc.co.uk/1/hi/entertainment/film/1669856.stm>.
- BBC (2003, 1st July) New Zealand Offers Film Grants (Electronic Version). *BBC News*. Retrieved 13th January 2004 from <http://news.bbc.co.uk/1/hi/entertainment/film/3035134.stm>.
- Beeton, Sue (2001) Smiling for the Camera: The Influence of Film Audiences on a Budget Tourism Destination. *Tourism, Culture and Communication*. 3 (1). 15-26.
- Belch, G.E., and Belch, M.A. (1998) *Advertising and Promotion: An Integrated Marketing Communications Perspective: International Edition*. 4th edition. McGraw Hill: Boston.
- Bruce, D. (2001) NZ Hang-Gliding Pioneer Returns. *Otago Daily Times*. 18th January. 11.
- Burns, D., B.L. Driver, M.E. Lee, D. Anderson, and P.J. Brown (1994) *Pilot Tests for Implementing Benefits-Based Management*. The Fifth International Symposium on Society and Resource Management: Advances in Amenity Resource Management. Colorado. June 8th.
- Busby, G. and Klug, J. (2001) Movie-Induced Tourism: The Challenge of Measurement and Other Issues. *Journal of Vacation Marketing*. 7 (4). 316-332.
- Butler, R.W. (1990) The Influence of the Media in Shaping International Tourist Patterns. *Tourism Recreation Research*. 15 (2). 46-53.
- Clarke, H. (2001) Some Facts about *The Lord of the Rings*. *Prime Minister Helen Clarke: The Lord of the Rings*. Retrieved 19th January 2003 from <http://www.executive.govt.nz/minister/clark/lor/lor.htm>.
- Croy, W.G. and Walker, R.D. (2004) Fictional Media, Film and Tourism. In D. Hall, L. Roberts, and M. Mitchell (Editors). *New Directions in Rural Tourism*. Ashgate.
- Gartner, W. C. (1993) Image Formation Process. *Journal of Travel and Tourism Marketing*. 2. 191-215.
- Hammitt, W.E (1980) Outdoor Recreation: Is it a Multi-Phase Experience? *Journal of Leisure Research*. 12 (2). 107-115.
- Hill, D. (1994) Beatson Doesn't Play The Piano. *Admark*. 31st March. 48.
- Houpt, S. (2003, 4th January) Our Next Stop will be Frodo's Hut (Electronic Version). *The Globe and Mail*. Retrieved 23rd January 2004 from <http://www.Globeandmail.com/servlet/ArticleNews/printarticle/gam/20030104/RVTRAV>.

- MacInnis, D.J. and Price, L.L. (1987) The Role of Imagery in Information Processing: Review and Extensions. *Journal of Consumer Research*. 13 (March). 473-491.
- Meyrowitz, J. (1985) *No Sense of Place: The Impact of Electronic Media on Social Behaviour*. New York: Oxford University Press.
- Ministry of Tourism (2004) The Tourism Industry. *Ministry of Tourism*. Retrieved 9th January 2004 from <http://www.tourism.govt.nz/aboutus/au-tourismindustry.html>.
- New Line Cinema (2004) The Lord of the Rings. *New Line Cinema*. Retrieved 13th January 2003 from <http://www.lordoftherings.net/>.
- New Zealand Institute of Economic Research (2002) *Scoping The Lasting Effects Of The Lord Of The Rings: Report To The New Zealand Film Commission*. Wellington: New Zealand Institute of Economic Research.
- NFO New Zealand (2002) *New Zealand International Visitors Survey: Results for the 12 Months to September 2002* (Electronic Version). Wellington. Retrieved 27th January 2004 from <http://www.tourisminfo.co.nz/doclibrary/IVS/IVSQuarterlyReportSept02.pdf>.
- NFO New Zealand (2003) *Lord of the Rings Market Research Summary Report*. Wellington: NFO New Zealand.
- Nielsen, C. (2001) *Tourism and the Media: Tourist Decision-Making, Information, and Communication*. Elsternwick. Hospitality Press Pty Ltd.
- NZPA (New Zealand Press Association) (1994) 'Piano' Gives NZ World Springboard. *New Zealand Herald*. 24th March. 24.
- One News (2003, 30th June) Cash Incentives for Film, TV Makers (Electronic Version). *One News*. Retrieved 30th June 2003 from www.nzzoom.com.
- Otago Daily Times (2003a, 25th March) Tax Breaks a One-off (Electronic Version). *Otago Daily Times*. Retrieved 9th January 2004 from <http://www.odt.co.nz/>.
- Otago Daily Times (2003b, 1st July) Grants to Encourage Films Made in NZ (Electronic Version). *Otago Daily Times*. Retrieved 9th January 2004 from <http://www.odt.co.nz/>.
- Riley, R.W. (1994) Movie Induced Tourism. In A.V. Seaton (Editor). *Tourism: The State of the Art*. England, John Wiley and Sons Limited: 453-458.
- Riley, R.W., D. Baker and C.S. Van Doren (1998) Movie Induced Tourism. *Annals of Tourism Research*. 25 (4). 919-935.
- Riley, R.W. and C.S. Van Doren (1992) Movies as Tourism Promotion: A 'Pull' Factor in a 'Push' Location. *Tourism Management*. 13 (3). 267-274.
- Rotherham, F., and Hirschberg, L. (2003) Model Tourists. *Unlimited*. August. 30-39.
- SPADA (Screen Producers and Directors Association of New Zealand) (2001) *Survey of Screen Production in New Zealand 2000*. Wellington: Screen Producers And Directors Association of New Zealand.
- Statistics New Zealand (2003) *Tourism, International Visitor Arrivals: November 2003*. Wellington: Statistics New Zealand.
- Thompson, W. (2000, 19th August) Disney Heads to Henderson. *New Zealand Herald*. 10.
- Tooke, N. and M. Baker (1996) Seeing is Believing: the effect of Film on Visitor Numbers to Screened Locations. *Tourism Management*. 17 (2). 87-94.
- Tourism New Zealand (2002) *Tourism New Zealand Annual Report: 20012-2002*. Wellington.
- Tourism New Zealand (2003) *Tourism New Zealand Annual Report: 2002-2003*. Wellington.

- Tourism New Zealand (2004a) Visitor Arrivals. *Tourism New Zealand*. Retrieved 9th January 2004 from http://www.tourisminfo.govt.nz/cir_randd/index.cfm?fuseaction=Arrivals&subaction=Tab2.
- Tourism New Zealand (2004b) 100% Pure New Zealand. *Tourism New Zealand*. Retrieved 19th January 2004 from <http://www.purenz.com>.
- Tourism New Zealand (2004c) Interactive Travellers: How do They Plan Their Holidays? (Electronic Version). *Tourism New Zealand*. Retrieved 9th January 2004 from <http://www.tourisminfo.govt.nz/documents/Int%20active5%20front.pdf>.
- Tourism New Zealand (2004d) Interactive Traveller Information Flyers. *Tourism New Zealand*. Retrieved 9th January 2004 from http://www.tourisminfo.govt.nz/cir_pub/index.cfm?fuseaction=253
- Tourism New Zealand (2004e) Interactive Travellers: Who are They? (Electronic Version). *Tourism New Zealand*. Retrieved 9th January 2004 from <http://www.tourisminfo.govt.nz/documents/Flyer%202.pdf>.
- Tourism New Zealand (2004f) International Visitors Survey. *Tourism New Zealand*. Retrieved 19th January 2004 from http://www.tourisminfo.govt.nz/cir_randd/index.cfm?fuseaction=Survey.
- Tourism Research Council New Zealand (2004) Total Day Trips and Overnight Trips by Quarter. *Tourism Research Council New Zealand*. Retrieved 9th January 2004 from <http://www.trcnz.govt.nz/Surveys/Domestic+Travel+Survey/Data+and+Analysis/Table+Total+Trips+by+Quarter.htm>.
- Tourism Strategy Group (2001) *New Zealand Tourism Strategy 2010*. Wellington: Tourism Strategy Group.
- Turner, G. (1999) *Film as Social Practice*. 3rd Edition ed. London: Routledge.
- Walker, R.D. (2002) *Film Friendly Queenstown: Tourism, Film, Local Government and the Community*. A thesis submitted for the partial fulfilment of Master of Tourism. Dunedin, New Zealand: University of Otago,
- Woodside, A.G. and D. Sherrell (1977) Traveller Evoked, Inept, and Inert Sets of Vacation Destinations. *Journal of Travel Research*. 16 (1). 14-18.
- Woodside, A.G. and Lysonski, S. (1989) A General Model of Traveler Destination Choice. *Journal of Travel Research*. 27 (4): 8-14.