

'Mood of the Nation'  
New Zealanders' perceptions of tourism  
December 2015



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# Background

- Tourism 2025 aims to increase the value of tourism to \$41 billion by 2025 with a focus on building value rather than volume
- Tourism 2025 identifies visitor experience as a key areas to help grow value with a key part of the customer journey being interaction with local communities to help create a unique and pleasurable visitor experience
- In recent years, New Zealand has seen strong volume growth in international tourism
- This has been accompanied by some negative sentiment and wide media coverage on foreign drivers and road accidents
- The purpose of the 'Mood of the Nation' research programme is to reveal New Zealanders' perceptions of the size and value of tourism as well as measure perceived benefits and downsides
- The overall aim of the research is to identify key issues that might negatively impact perceptions and tolerance for further growth

# Overview of research approach



## Method and audience

TNS conducted an online survey of residents in New Zealand aged 18 plus



## Area quotas

To ensure sufficient representation from traditional tourism areas, the following regional quotas were applied with minimum targets for key cities/towns:

	<b>Regional Quotas</b>	<b>City / Town Targets</b>
<b>Auckland region</b>	100	Minimum: N = 80 from Auckland City (Achieved: N = 83)
<b>Wellington region</b>	80	Minimum: N = 60 from Wellington City (Achieved: N = 61)
<b>Bay of Plenty</b>	50	Minimum: N = 40 from Rotorua (Achieved: N = 40)
<b>Other North Island</b>	100	
<b>Canterbury</b>	80	Minimum: N = 40 from Christchurch (Achieved: N = 75)
<b>Otago</b>	50	Minimum: N = 30 from Queenstown (Achieved: N = 17)
<b>Other South Island</b>	40	
<b>TOTAL</b>	500	



## Fieldwork dates

502 online interviews were conducted over the period December 2, 2015 to December 6, 2015



## Weighting and Analysis

Respondents were weighted by gender, age and region to be broadly representative of the New Zealand population based on the 2013 census

Regional analysis will be reported in the next wave of research based on aggregated data over the first two waves to provide the benefit of larger sample sizes



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# A range of articles related to tourist visitors featured in the media during the week of fieldwork

## 'What are you doing?' - suspected tourist driver filmed in wrong lane around corners

Tue, Dec 1 Share

Luke Appleby  
ONE News Now Reporter



A car weaving all over the road near Milford Sound prompted one man to call police - but by the time they got back to him, it was all over.



## Hahei grapples with tourist tensions



By Sophie Lowery  
Reporter

Sunday 29 Nov 2015 6:08 p.m. Join the discussion



## Popularity with tourists has its drawbacks

5:00 AM Wednesday Dec 2, 2015

Tekapo Tourism NZ

☆ f 8 t i 0 g+ 0



The picturesque church at Lake Tekapo. Photo / Dean Purcell

The guardians of one of New Zealand's most photographed churches say it is being overrun by tourists and they want visitors to chip in.

The Church of the Good Shepherd at Lake Tekapo now attracts 300,000 visitors a year and there are issues with security, safety, rubbish and hygiene.

## Motorcyclist killed in crash with tourists named

By Timothy Brown

3:20 PM Monday Nov 30, 2015

Accidents

☆ f 2.6k t i 14 g+ 0



## Auckland hotel rates will continue to rise, Hospitality Association says

JOHN ANTHONY

Last updated 17:29, December 1 2015

✉ f t g+ i ...



The 140-apartment Adina hotel opened in Auckland's Britomart precinct on Tuesday.

Auckland hotel rates are climbing and will continue to do so until more hotels are built, the Hospitality Association says.

# Key insights (1 of 2)

1

New Zealanders have mixed knowledge of the tourism industry:

- Most are aware of its value to the economy, although not all know how highly it ranks
- Few are aware of the number of New Zealanders either directly or indirectly employed by the industry, and most tend to over estimate the figure
- Few are aware of the annual number of visitors, with most under-estimating these

2

Attitudes towards current visitor numbers are generally positive with few thinking that current numbers are too high

3

Many express interest in seeing an increase in visitor numbers (28%) which is driven by strong awareness of the benefits that this would provide to the economy and employment opportunities

4

The majority think that New Zealand is well equipped to handle current international visitor numbers; for the few that believe current numbers are applying too much pressure, this is typically seen to be localised to areas such as Auckland, Queenstown and Rotorua

5

Future predicted growth brings concerns to the fore for many:

- Three in ten New Zealanders think that the predicted growth is too high – concerns about the impact increased numbers will have on New Zealand in terms of aspects such as road safety, infrastructure, the environment and over crowding start to outweigh the economic benefits for this group
- Even among those accepting of the predicted amount of growth, there is a view that New Zealand will need to adapt in terms of infrastructure and services to manage this – but there is a general confidence that there is the time and ability to do so

## Key insights (2 of 2)

6

There are a wide range of pressure points that will need to be addressed to reassure those who are worried about the amount of predicted future growth and to help drive tolerance, namely:

1. Our roads – from both a safety and congestion perspective
2. Accommodation for locals – both the price and ease of obtaining
3. Potential damage to our environment, including from littering
4. Over crowding / being too busy for New Zealanders to enjoy

7

In terms of the general benefits that international tourism provides there is strong recognition of the value that tourism brings to the economy, businesses and employment BUT fewer hold the view that tourism can provide benefits such as developments in infrastructure and recreational facilities of regions

### **Steps to help manage tolerance towards future growth:**

1. Build awareness of the wider benefits that tourism provides in terms of regional development to help further offset the perceived negatives such as over crowding
2. Ongoing initiatives will be required to increase the safety of our roads – communicate both improvements being taken to our roads but also the steps being taken to help ensure tourists have the ability to cope with our driving conditions
3. Address concerns around areas such as accommodation and potential damage to our environment

# 1

## Detailed information

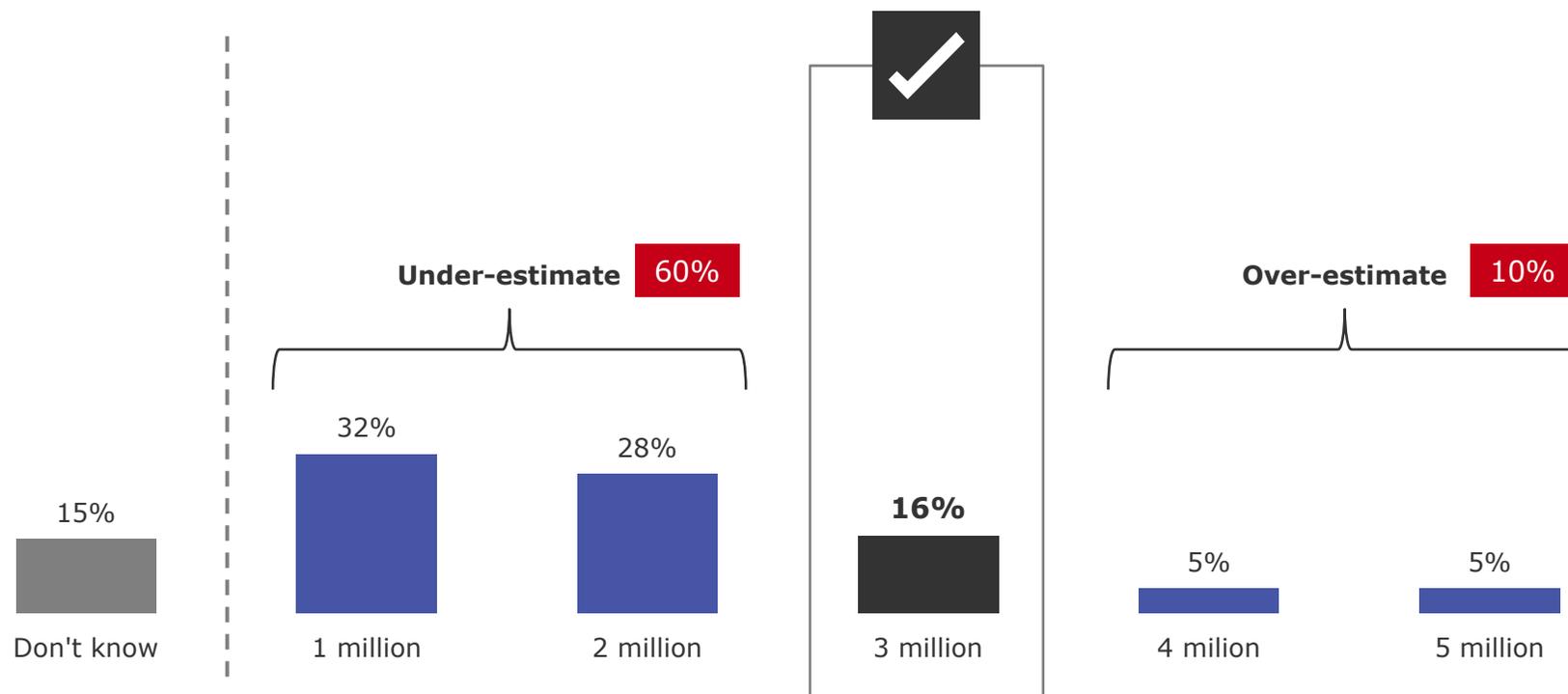


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# Few New Zealanders know the number of current international visitors each year, with many under-estimating the amount by up to 2 million

## Knowledge of annual international visitor numbers



Base: New Zealanders aged 18 plus N = 502

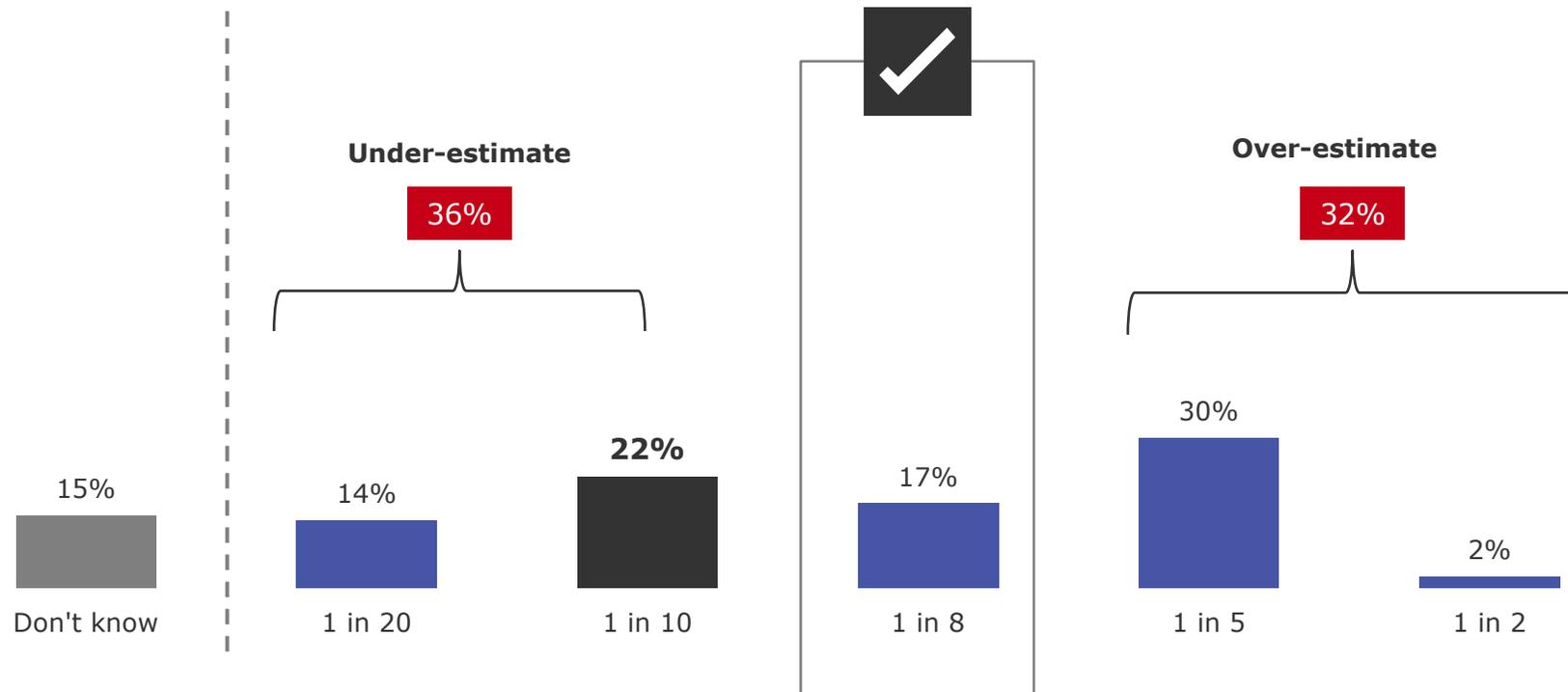


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Similarly there is low awareness of the number of workers employed in the tourism industry with most people over-estimating this

### Knowledge of New Zealand workers employed in the tourism industry (directly or indirectly)



Base: New Zealanders aged 18 plus N = 502

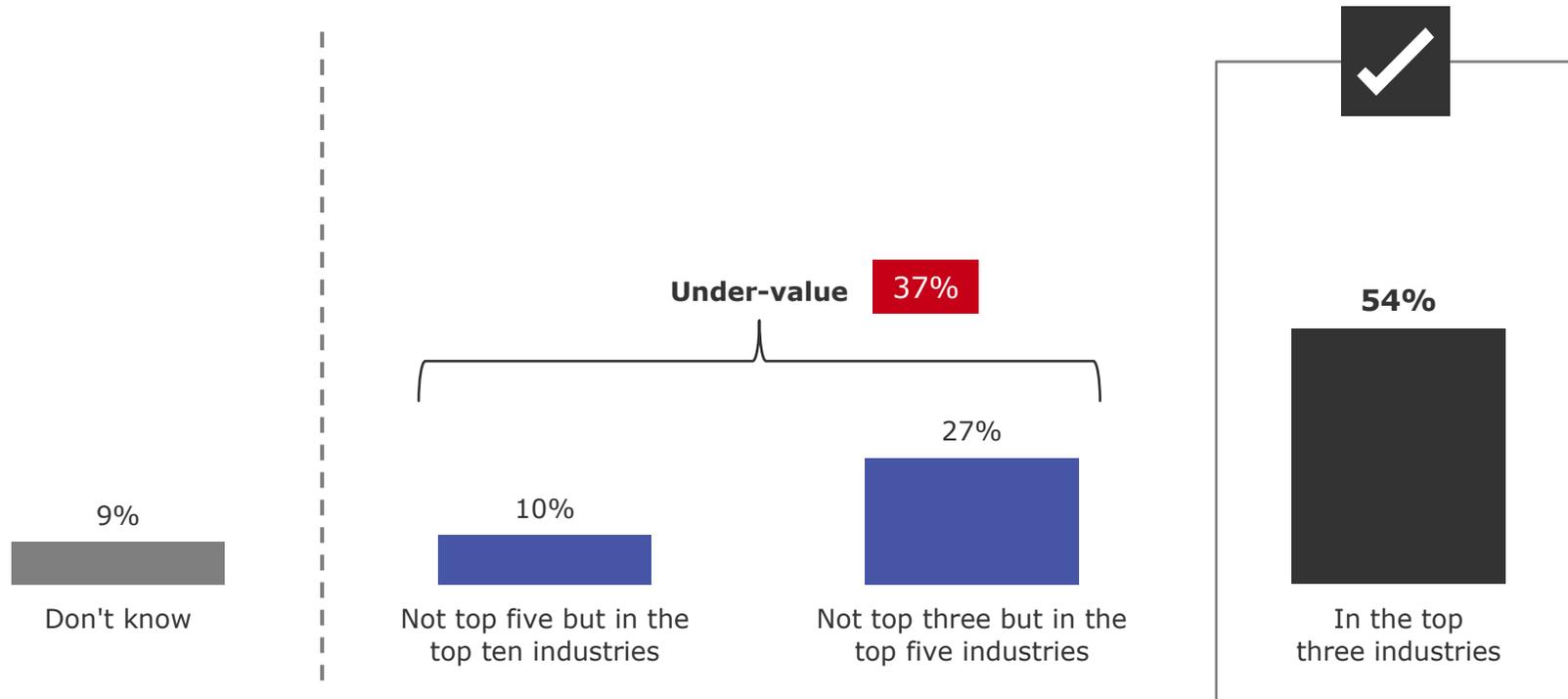


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Most New Zealanders are aware that international tourism is a key contributor to the economy but many don't know just how high it ranks

### Knowledge of the value of the tourism industry



Base: New Zealanders aged 18 plus N = 502



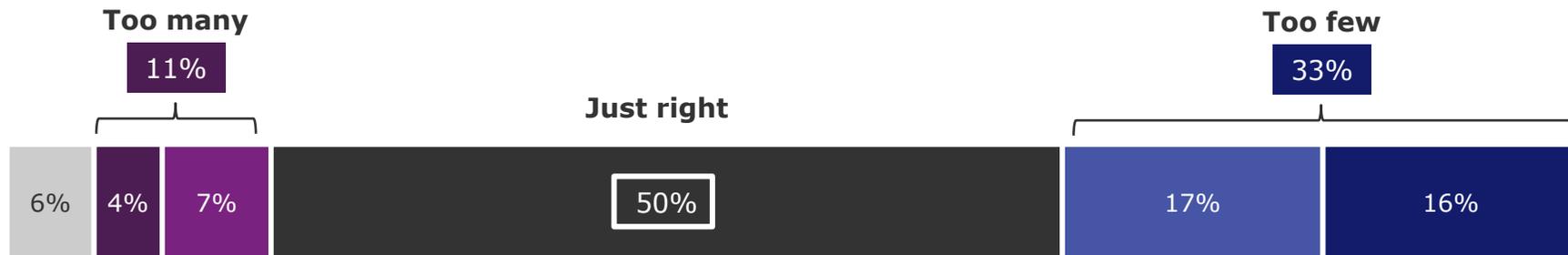
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# Few think that New Zealand attracts too many international visitors currently while many think that we should be attracting more

## Perceptions of whether New Zealand attracts too few or too many international visitors

Based on **perceived** number of current visitors:



Based on **actual** number of current visitors (after being told):



■ Don't know   ■ 1 = too many   ■ 2   ■ 3 = just right   ■ 4   ■ 5 = too few

Base: New Zealanders aged 18 plus N = 502



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Those wanting more international visitors recognise the benefits that they bring to our economy; common concerns focus on infrastructure, roads, environment and not wanting to be overcrowded

### Selection of verbatim reasons for there being....

#### Too many international visitors (11%)

- "They need to learn to **drive in NZ** conditions"
- "We **haven't got the infrastructure** to handle them"
- "Visitors don't take as much care of our **clean green environment** as they should (e.g. overseas trampers littering on the great walks)"
- "Job wise its **harder for Kiwis to get a job** because they employ the young tourists"
- "**Everywhere you look** there's overseas visitors"
- "We don't need any more **visitor drivers on the roads**. Those here now do more than enough damage."
- "You **see them everywhere**, they cram up the roads and the streets"
- "The **road toll** shows the problem"
- "They are **everywhere**"
- "Just **too many**"
- "The country is getting **over crowded**"

#### Just the right amount (50%)

- "Tourist attractions seem to always be busy but in general **not overcrowded** so I think things are balanced well"
- "NZ **doesn't have the facilities** to cope with more tourists"
- "Tourist attractions are **busy but still pleasant**"
- "There aren't enough **hotels and restaurants** to host more tourists"
- "We do well from tourism and there **aren't too many tourists around** to make it feel like too many."
- "Too many would be a **drain on resources** and harm delicate **environments**"
- "The income is great but we **don't want kiwis to be crowded out** of our own best bits"
- "Too many would cause too many problems such as **more traffic on the road**"
- "We **don't have the infrastructure** to cater for more"

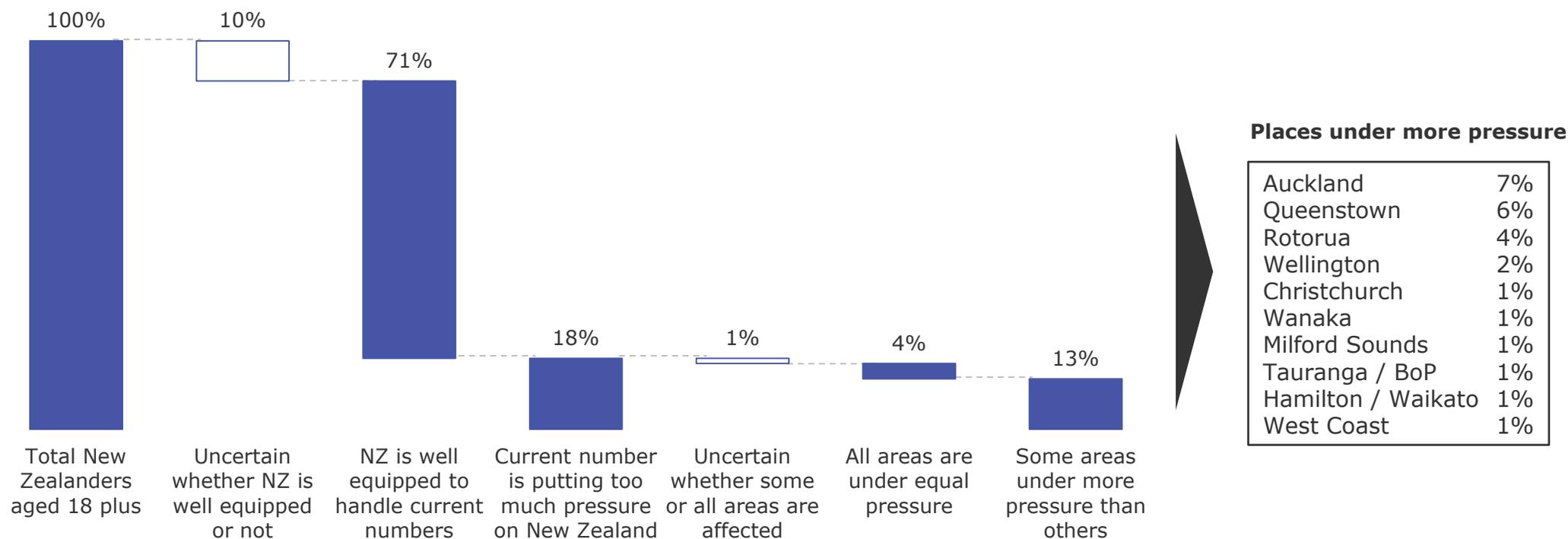
#### Too few international visitors (33%)

- "The more the better - increases **NZ's international brand** and helps **the economy**"
- "Increased visitor numbers mean **more people can be employed** in the tourism industry"
- "International visitors **bring revenue into the country**, so the more we have the better it is for the economy and for individual business people"
- "It's an industry; **volume = revenue**"
- "Essential for the **economy**, essential for **employment**, trade follows tourism"
- "They bring in **money for the economy**. We all benefit."
- "We need **more tourists who are going to spend lots of money** while they're here - not just those who try to travel on the cheap"
- "Tourism **helps drive our economy** through spend"

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The majority think New Zealand is well equipped to handle current visitor numbers; a small proportion view certain areas as being under more pressure than others, particularly Auckland, Queenstown and Rotorua

**Perceptions of pressure of current tourists on New Zealand society, infrastructure and/or environment**



Base: New Zealanders aged 18 plus N = 502



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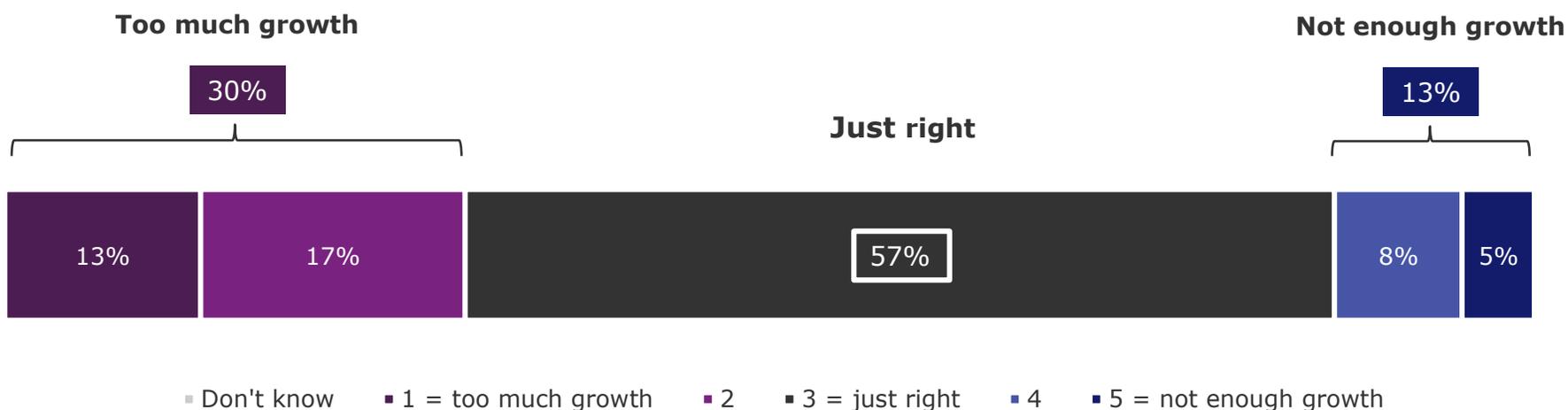
Specific ways in which current visitor numbers are perceived to be applying too much pressure are in terms of our roads, accommodation, prices for locals and polluting our environment

### Selection of verbatim ways in which current international visitors are applying too much pressure (18%)

- **“Bad roads and lack of accommodation”**
- **“Freedom campers messing up the environment and overloading public facilities. Also creating unnecessary danger on the roads and overloading emergency services”**
- **“Hard for locals to get bookings** such as hotel, motel, car rentals”
- **“Hospitality is very expensive and as a local I resent paying tourist prices”**
- **“Increased rubbish/litter especially in the remote places, not an adequate work force, too much competition for locals at traditional holiday spots.”**
- **“Lack of care for the environment** by some visitors. **Too many accidents** by overseas drivers.”
- **“Makes life competitive** for the locals”
- **“Roads are not perfect** to handle the traffic and many international tourists **cannot drive safely on NZ roads”**
- **“Scenic spots which used to be pristine are now overcrowded. Trash** - cigarette butts and litter. Increase in **road accidents** - loading up our medical services. Increase in **prices for food and accommodation**. Harder to find **remote spots for myself”**
- **“Water use, busyness of roads, cost to emergency services** of tourist accidents on roads, **cost to hospital services** of tourist accidents”
- **“We have not grown the infrastructure** to cope with the numbers”
- **“Roads, infrastructure, accommodation** demands”
- **“Road accidents, lost tourists** in the forest, up in the mountains, the list continues. this puts a **huge financial burden** on our country”

Once told predicted future growth, many think the amount is just right but concern that the growth is too much outweighs it not being enough

### Attitudes towards predicted future growth of annual international visitors



Concern about too much growth is spread across all regions of NZ with none skewing significantly higher than others

Base: New Zealanders aged 18 plus N = 502



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Although there is concern about the impact that more international visitors will have on our infrastructure, roads and attractions, many comment that there is the time to prepare for an increase in visitor numbers

### Selection of verbatim reasons for there being....

#### Too much predicted growth (30%)

- "NZ is nice because of its low population and we DO NOT need our bush, beaches, nature reserves **over flowing with people**"
- "Too much **littering**, and too many overseas visitors causing **serious car crashes**"
- "May put too much **strain on the country's infrastructure...** Tourists may not get the quality experience they may be looking for."
- "**Litter, crowds, car crashes**"
- "Will put too much **pressure on roads and facilities**"
- "Pushes up **prices of local activities** beyond the reach of NZers"
- "Tourist spots will **become crowded** if have too many visitors"
- "It will make it **harder for NZers to enjoy** the scenery and explore activities in their own country"
- "Too many people increasing **traffic and harming the environment**"

#### Just the right amount (57%)

- "It's **enough time to prepare** for the increase in tourist numbers"
- "The infrastructure relating to tourism is in need of expansion and hopefully we will **have time to adapt**"
- "Slow increase allowing **time to develop** alongside"
- "We have the **capacity for growth** (labour and capital resources)"
- "Good increase **over a period of time** which allows providers to **upsized to accommodate growth**"
- "It will **boost the local economy**"
- It is a **sustainable growth increase** so services can be developed without a lot of difficulty"
- "NZ relies on tourism. With a growing population and increasing unemployment, increased tourism offers **opportunity for employment growth.**"
- "Creates **jobs and investment opportunities**"

#### Not enough predicted growth (13%)

- "As long as we keep building the necessary infrastructure we can **double the numbers.** Great for the **economy and employment**"
- "**More economic growth** adds to the lifestyle of New Zealanders"
- "The more visitors we get, the **better for our country economically**"
- "It is a **major industry** within the country and for our economy to grow, so must this"
- "We could handle more and its **good for the economy**"
- "We need to encourage more as it **provides income and work**"
- "There is room to increase the number of visitors, especially if we can do this **more evenly throughout the year**"
- "More visitors. More **money.** More **development.** More **employment**"
- "Great for **employment and revenue**"

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Overall the perceived positives of international tourism are more prominent than the negatives but the safety and congestion of our roads is of concern to many

### Pros and cons of international tourism<sup>(1)</sup>



Base: New Zealanders aged 18 plus N = 502

Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown



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# There are wide range of concerns that will need to be addressed to reassure those who are worried about the amount of predicted future growth

## Pros and cons of international tourism - by attitudes towards predicted future growth<sup>(1)</sup>

	Too much growth	Right amount	Not enough growth
<b>PROS:</b>			
Creates economic growth for the regions	44%	63%	72%
Creates growth opportunities for businesses	36%	59%	72%
Creates employment opportunities for residents	35%	56%	68%
Adds to the vitality of regions and local communities	29%	41%	62%
Drives improvements to recreational facilities in local communities	30%	41%	55%
Drives infrastructure development in the regions	30%	39%	48%
Connects local communities to other cultures	30%	32%	61%
<b>CONS:</b>			
Increases the risk of serious road accidents	58%	36%	28%
Results in increased traffic congestion on holiday routes	59%	35%	23%
Results in a higher number of road accidents	54%	36%	25%
Makes accommodation too expensive for New Zealand residents	55%	23%	15%
Results in increased littering	50%	19%	18%
Results in damage to New Zealand's natural environment	43%	13%	10%
Makes it hard for New Zealand residents to find accommodation vacancies	43%	12%	9%
Means attractions are too busy for New Zealand residents to enjoy	38%	12%	10%
Increases congestion in the walking areas of urban centres	30%	14%	9%
Makes it hard to find enough staff to work in the tourism industry	18%	11%	11%

Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown

Relative agreement  
Weaker  Stronger



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# 2

## Attitudes of North Islanders and South Islanders

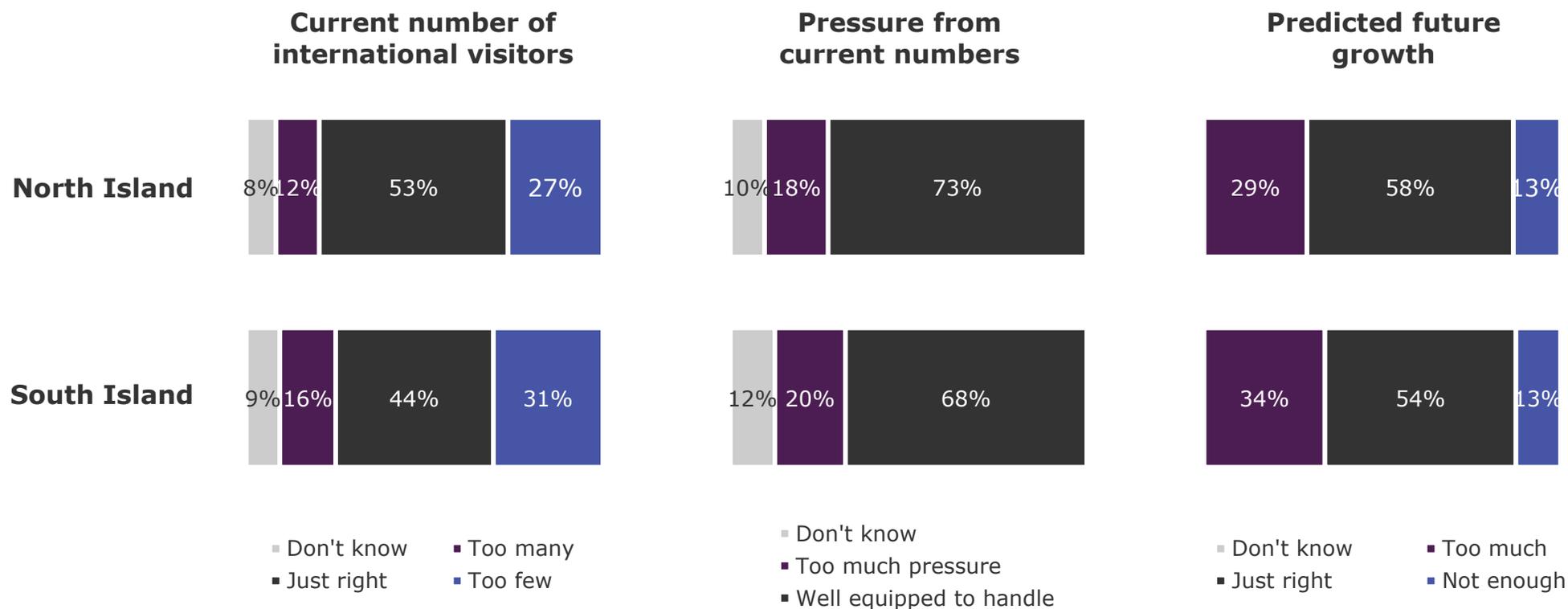


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# Attitudes towards the current number of international visitors and the predicted growth does not differ based on whether living in the North or the South Island

## Attitudes towards current number of annual international visitors and predicted growth - by North Island and South Island residency



Base: New Zealanders aged 18 plus North Island N = 331, South Island N = 171



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Positives and negatives are also generally similar although road accidents and the cost of accommodation are of higher concern to those living in the South Island than the North Island

**Pros and cons of international tourism – by North Island and South Island residency (1)**

	North Island	South Island
<b>PROS:</b>		
Creates economic growth for the regions	59%	57%
Creates growth opportunities for businesses	55%	49%
Creates employment opportunities for residents	52%	51%
Adds to the vitality of regions and local communities	41%	37%
Drives improvements to recreational facilities in local communities	41%	33%
Drives infrastructure development in the regions	37%	39%
Connects local communities to other cultures	34%	38%
<b>CONS:</b>		
Increases the risk of serious road accidents	40%	47%
Results in increased traffic congestion on holiday routes	40%	42%
Results in a higher number of road accidents	38%	48%
Makes accommodation too expensive for New Zealand residents	29%	40%
Results in increased littering	29%	26%
Results in damage to New Zealand's natural environment	21%	24%
Makes it hard for New Zealand residents to find accommodation vacancies	19%	26%
Means attractions are too busy for New Zealand residents to enjoy	18%	25%
Increases congestion in the walking areas of urban centres	18%	19%
Makes it hard to find enough staff to work in the tourism industry	12%	16%

These are significantly higher among South Islanders

Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown



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