

Mood of the Nation  
New Zealanders' perceptions of international tourism  
November 2016



# Contents

---

## 1

Background and approach 3

---

## 2

Key insights 6

---

---

## 3

Detailed insights 8

---

## 4

Appendix: measures by region 27

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# 1

## Background and approach

# 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 priority area to help grow value. An essential aspect of a unique and pleasurable visitor experience is interaction with local communities



In recent years, New Zealand has seen strong volume growth in international tourism



This has been accompanied by some negative sentiment and broad 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 sample sizes

This wave (Nov-16) we achieved a total sample of 521. We set minimum quotas to ensure sufficient representation from traditional tourism hotspots, and what we achieved each wave in those areas is below:

	Wave 1 (Dec-15)	Wave 2 (Mar-16)	Wave 3 (Nov-16)
<b>Auckland city</b>	83	100	81
<b>Wellington city</b>	61	80	81
<b>Rotorua</b>	40	50	48
<b>Christchurch</b>	75	80	80
<b>Queenstown</b>	17	51	54



## Fieldwork dates

Wave 1: 502 online interviews were conducted over the period December 2, 2015 to December 6, 2015

Wave 2: 520 online interviews were conducted over the period March 17, 2016 to April 2, 2016

Wave 3: 521 online interviews were conducted over the period November 7, 2016 to November 17, 2016



In the middle of fieldwork (13<sup>th</sup>/14<sup>th</sup> November) a large earthquake struck the North Canterbury to Wellington region slowing fieldwork for a few days and potentially influencing 'the mood of the nation' towards tourism



## 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

# 2

## Key insights

# Key insights

1

New Zealanders generally under estimate the number of international visitors New Zealand gets each year, with only 20% aware the country receives 3.4 million annually

2

Just 25% know how many people are employed directly or indirectly by the tourism industry, and only 16% of the nation is aware of tourism's recent shift from being in the top three to becoming New Zealand's number one export industry

3

Negativity towards tourism is likely to grow; upon being made aware of the facts, compared to a year ago, more Kiwis believe we are getting too many visitors and that this is putting too much pressure on the country

4

Furthermore, more Kiwis now believe the forecast for international visitor growth of 4 million visitors per year, achieved in the next two to three years, represents too much growth

5

New Zealanders perceive the main benefits of international tourism to be commercial / economic while road accidents and traffic congestion are among the top concerns

6

When probed further, people with negative views towards tourism are also concerned about the lack of infrastructure to accommodate visitor numbers, detrimental consequences for the environment, and increased road risks

# 3

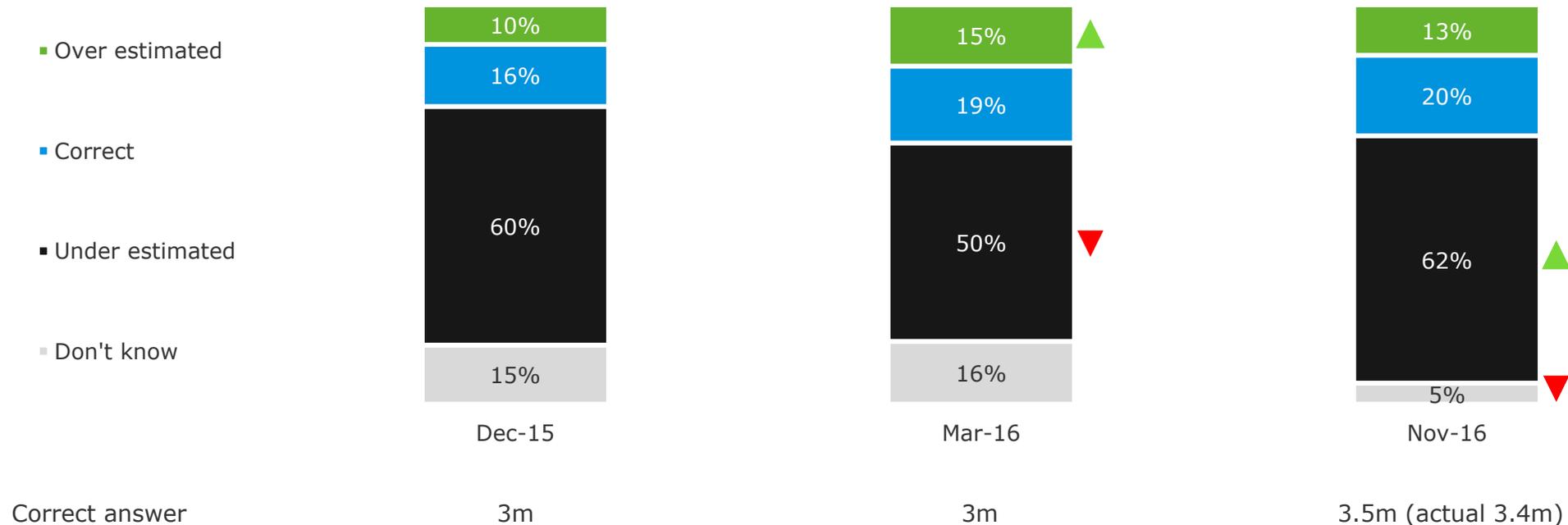
## Detailed insights

# A large proportion of the population continue to under estimate the number of international visitors New Zealand gets each year

## Knowledge of annual visitor numbers

%, 18+ year olds

North Island regions outside the major cities or Bay of Plenty are **less likely** to correctly estimate annual visitor numbers

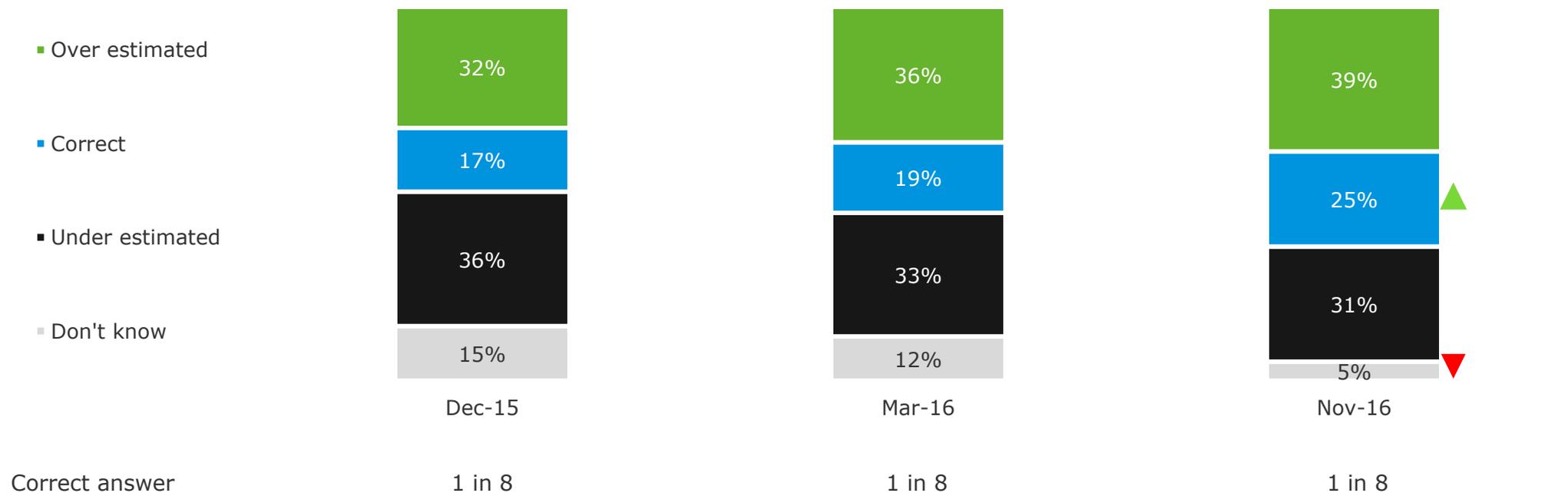


Base: New Zealanders aged 18 plus Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521

▲ ▼ Significantly higher / lower than previous wave at 95% CL

# A quarter of New Zealand adults know that 1 in 8 Kiwis are directly or indirectly employed in the tourism industry, significantly higher last wave

Knowledge of New Zealand workers employed in the tourism industry (directly or indirectly)  
%, 18+ year olds



Base: New Zealanders aged 18 plus Dec-15 N = 502; Mar-16 N = 520; Nov-16 N = 521

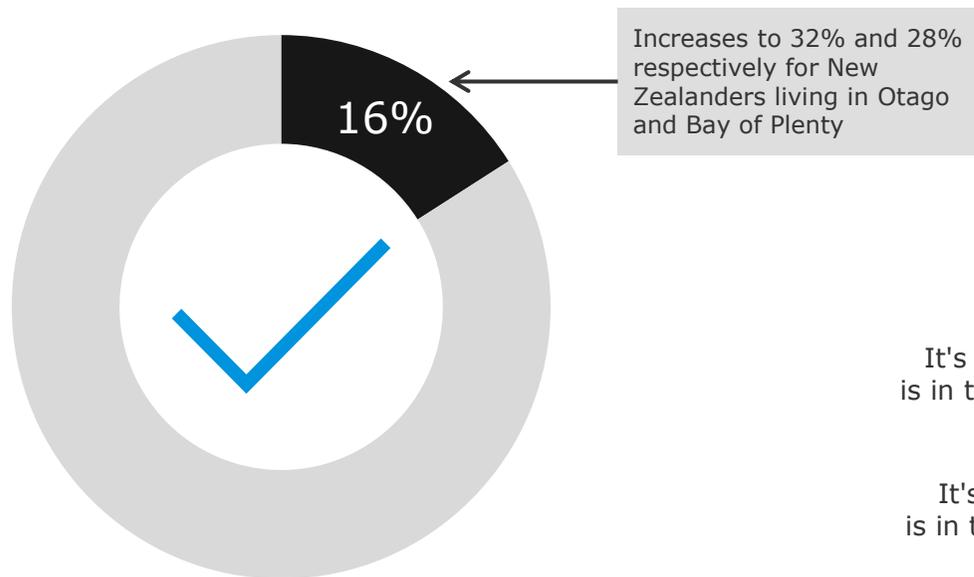
▲ ▼ Significantly higher / lower than previous wave at 95% CL

# Only 16% of the nation know the true value of the tourism industry since its recent shift to become New Zealand's number one export industry

## Knowledge of the value of the tourism industry

%, 18+ year olds, Nov-16

### It's number one



The value of the tourism industry moved from being in the top three to becoming New Zealand's number one export industry between the Mar-16 and Nov-16 waves

### Compared to previous waves

Dec-15 & Mar-16

	Nov-16	Dec-15 & Mar-16
It's number one	16%	NA
It's in the top three industries	61%	55%
It's not top three but it is in the top five industries	17%	27%
It's not top five but it is in the top ten industries	3%	10%
Don't know	2%	8%

Base: New Zealanders aged 18 plus Dec-15 and Mar-16 N = 1,022; Nov-16 N = 521

As the number of visitors is generally under estimated, when people learn the actual number, they are more likely to think New Zealand gets enough or too many visitors each year

Perceptions of whether New Zealand attracts too few/too many international visitors  
%, 18+ year olds, Nov-16

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



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



■ Don't know   ■ Too few   ■ Just right   ■ Too many

Base: New Zealanders aged 18 plus Nov -16 n = 521

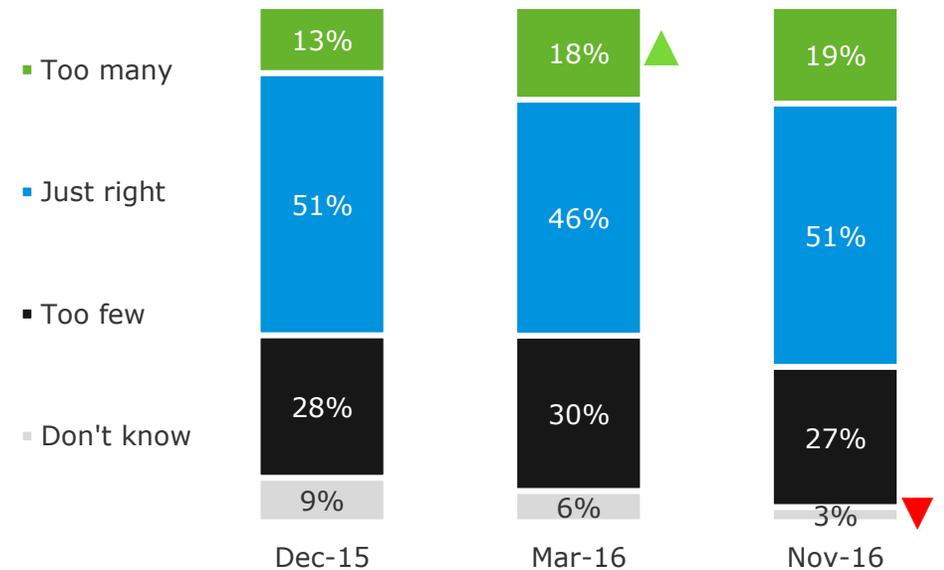
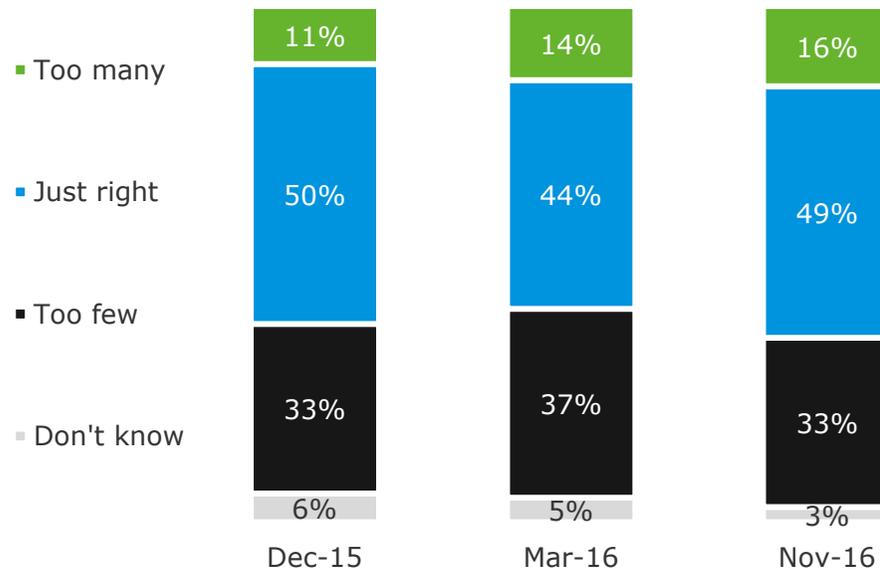
▲ ▼ Significantly higher / lower than "perceived" at 95% CL

# The proportion of people that believe New Zealand attracts too many visitors has grown in the past year, indicating potential 'anti-tourist' sentiment

Perceptions of whether New Zealand attracts too few/too many international visitors  
%, 18+ year olds

Based on **perceived** number of current visitors

Based on **actual** number of current visitors



Base: New Zealanders aged 18 plus Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521

▲ ▼ Significantly higher / lower than previous wave at 95% CL

# These people believe New Zealand does not have the infrastructure to support the current number of tourists, leading to damage to the natural environment and tourist destinations being less accessible for Kiwis

Themed verbatim reasons for there being **too many** international visitors (19%)



## Lack of infrastructure

- "Our infrastructure doesn't support it that well. In Wellington central it can be annoying when a boat load of visitors visit - there's just not enough room"
- "Our infrastructure is suffering especially on walking tracks"
- "The country is too small. The infrastructure is struggling to cope. The numbers should be kept down, with a good mix of high-end tourists and backpackers, not the multitudes who just want to "tick us off" their list"
- "The infrastructure, facilities and accommodations seem to be stretched out to the limit"
- "There is not the infrastructure to cope with all the visitors that come in and it is changing communities from places where people could live and work to tourist centres where prices are so high that people are unable to afford to live"

## Damaging nature

- "I worry that our environment will suffer. There are a number of nature sites that are now suffering from too many visitors"
- "Our country and resources aren't meant to host those millions of visitors without damaging the nature and not leaving a footprint which takes ages to recover"
- "We are losing our natural sightseeing It is becoming more touristy"
- "Because one of the things that makes NZ such an amazing country, and what people come to see is the untouched wilderness. In the last ten years alone it's disappearing, tourists are over-running our wonderful natural places - for example the Tongariro crossing - more like a motorway these days. Freedom campers are ruining the quiet beauty of the countryside with parties leaving empty beer bottles and mounds of toilet roll"

## Overcrowding

- "Overcrowding at tourist sites - national parks etc. Hard to find good quality accommodation at an affordable price. Some sites are having restrictions put on them and New Zealanders are finding it hard to visit them because tourists are given priority"
- "We seem to be overrun by international visitors"
- "Don't want it to feel over crowded"
- "It's become unpleasant for Kiwis to tour their own country, as every attraction is overcrowded with tour buses, long lines, and feeling totally overrun"
- "Locals battle to visit their own country because it is over run by tourists"
- "My part of NZ is overcrowded with visitors, their vehicles and their rubbish, and our town is not allowed to make enough money off them to provide facilities for them and the people who look after them"

# Those who think New Zealand should attract more visitors recognise the economic benefits this can achieve

Themed verbatim reasons for there being **too few** international visitors (27%)



## Economic growth

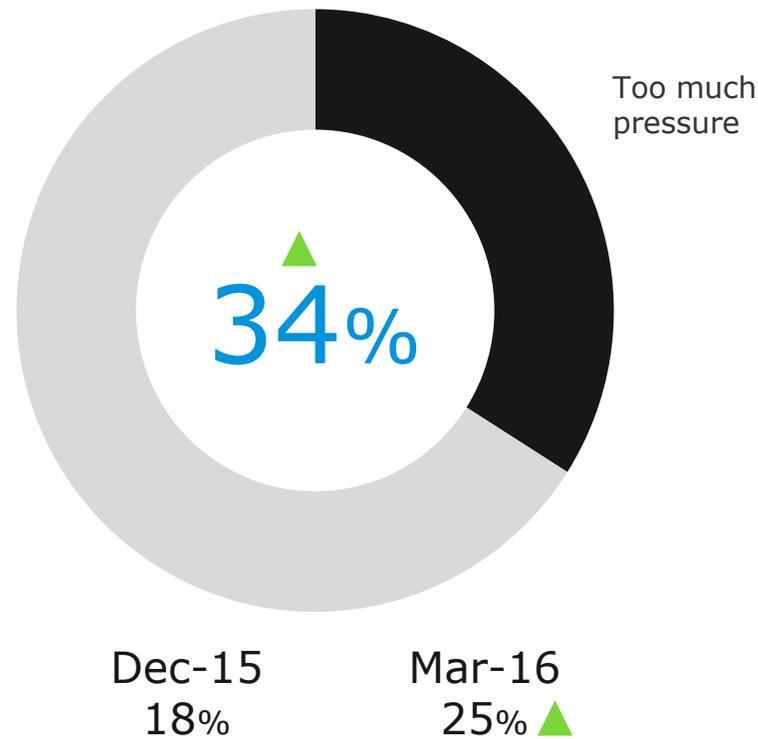
- "Because the more visitors we get, the better for the economy"
- "Because tourism needs as many as it can get; they spend money which is good for our economy"
- "Good revenue from tourism and always room for more"
- "Tourism brings in a huge amount of money for the country"
- "Good for NZ economy"
- "I feel as though we could target more high yield tourists by improving our tourism infrastructure e.g. five star hotels and better transport links such as rail"
- "I feel we need more tourists to generate more revenue for retail and other attractions"
- "We have the space and the resources to handle more. Resulting in more jobs and a better economy"
- "I live in Matamata where Hobbiton is a huge employer. More visitors would be great for our local economy"
- "In my opinion you can never have too many tourists and provided we can accommodate them, bring them on"
- "International visitors are good for NZ's economy and culture"
- "It is good for regional economies such as Queenstown and Wanaka where there are too few employment opportunities"
- "It would be very good for the economy if we could have more tourists"
- "It's good for them to come and spend money in local industries"
- "Living in a small town we now rely on tourists bringing income into the area"
- "More is only better . That means more jobs , more growth"

## Showcase New Zealand

- "Great country and needs to be promoted"
- "It's a beautiful country with a lot to offer and more people should visit"
- "It's a great country and everyone should see it. Contrast with Australia we should get a similar level of tourists"
- "More visitors=more free publicity"
- "New Zealand is a special country. I believe more people should come to NZ and see and know how beautiful it is here"
- "NZ has lots of things and people to show international visitors, but it could do better"
- "We live in the most beautiful place in the world, you travel around NZ and you only see tourists in random spots across the country. There is a lot of NZ to see, and a lot of it isn't set up for tourism or tourists"

# The proportion of Kiwis who think the current number of tourists is putting too much pressure on the country has almost doubled in the past year

Perceptions of the pressure that tourists put on New Zealand  
%, 18+ year olds, Nov-16



▲ ▼ Significantly higher / lower than previous wave at 95% CL

# The pressures are mainly seen to be on infrastructure, the natural environment and road safety

## How do tourists put too much pressure on New Zealand?



### Pressure on infrastructure

- "Infrastructure in smaller towns is not able to cope with strong visitor demand. Many tourists do not respect the environment around them, leaving rubbish and taking things that should not be taken"
- "Infrastructure is not significantly in place to deal with the current numbers or increase, especially roads and facilities (i.e. for campervans and freedom campers) in the south island and the southern lakes in particular"
- "It is not the number of visitors that is the problem, but that there is not the infrastructure available and perhaps there needs to be a bigger buy in by New Zealanders"
- "Need to put better infrastructure and systems in place to ensure protection of the environment and make sure we have the services to provide what tourists are paying for"
- "Our infrastructure is under pressure and crumbling, and is not allowed to be enlarged to cope"

### Environmental damage

- "Accommodation, general facilities and lack of supervision/rules regarding camping, litter and keeping the environment clean"
- "Amenities, space, traffic, opportunities, rubbish, noise, and high possibility of irreversible environmental damage"
- "Environment issues, littering, using public spaces as toilets and accommodation issues for example"
- "The freedom camping seems to be out of control. With little thought for residents it effects and the damage, littering and outdoor toileting. There needs to be harsher penalties for disrespecting locals and the environment"
- "Environmental aspects like freedom campers leaving areas polluted"
- "Freedom campers ruining the environment by dumping rubbish and human waste"
- "Strained infrastructure; freedom camping issues soiling the environment"

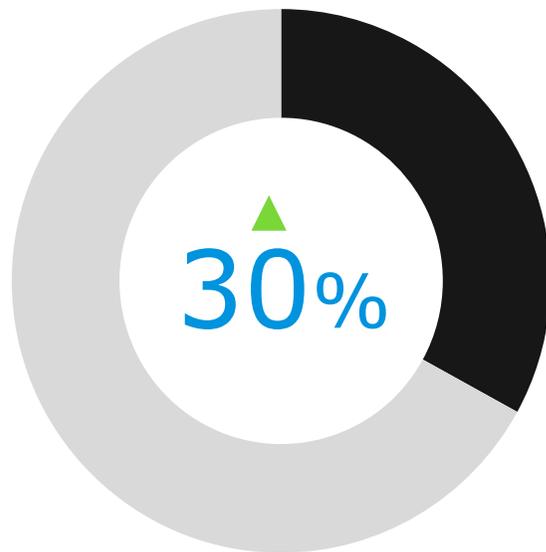
### Road safety and traffic

- Filling up roads, using water, requiring council to put in more infrastructure, but ratepayers foot the bill. Travel affects the environment"
- "Traffic congestion, incorrect driving habits from visitors, unfamiliar drivers trying to handle unfamiliar driving conditions"
- "In regard to roads, we have narrow roads in places with many bottle necks. I also don't think that cities were built with such growth in mind initially"
- "Increased traffic causes congestion on the roads and significantly contributes to pollution of the air. In order to be able to adequately service increasing numbers of tourists we need to ensure our roads are properly maintained"
- "They don't know our road rules and are putting New Zealand lives in danger with their driving, which increases pressure on doctors, hospitals, ACC, St John etc."
- "Roads, traffic - volumes & accidents"

Also on the rise is the perception that some places are under more pressure than others; in particular, Queenstown, Auckland and Rotorua

“Some places are under more pressure”

% agree, 18+ year olds, Nov-16



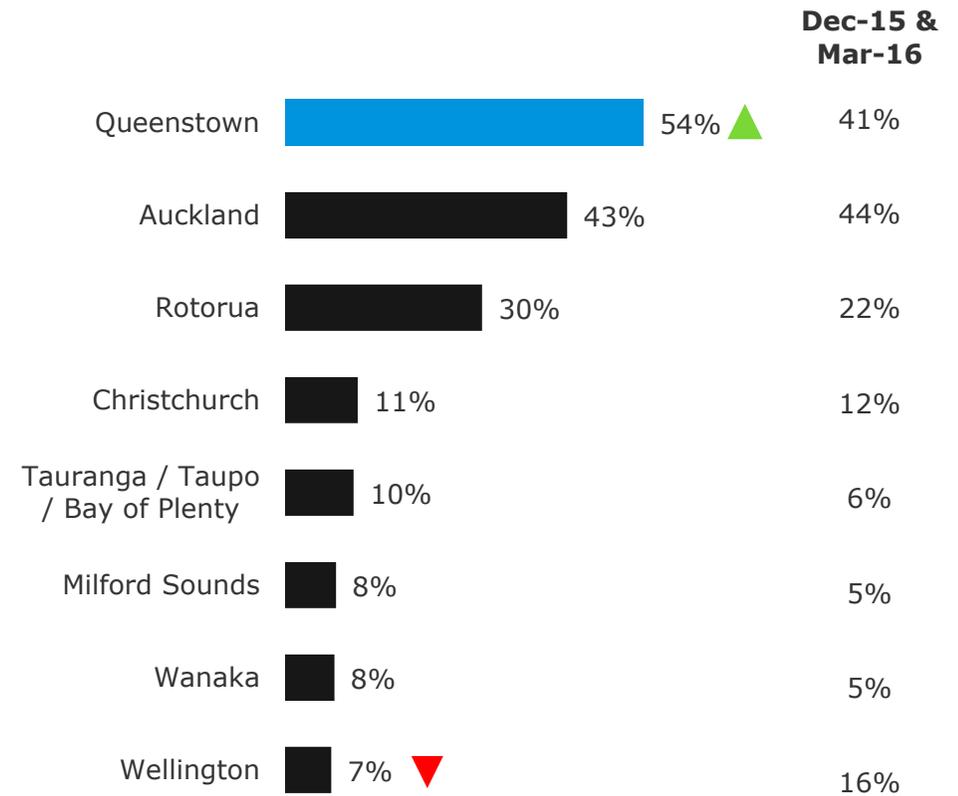
Dec-15  
13%

Mar-16  
21% ▲

▲ ▼ Significantly higher / lower than previous waves at 95% CL

Which places?

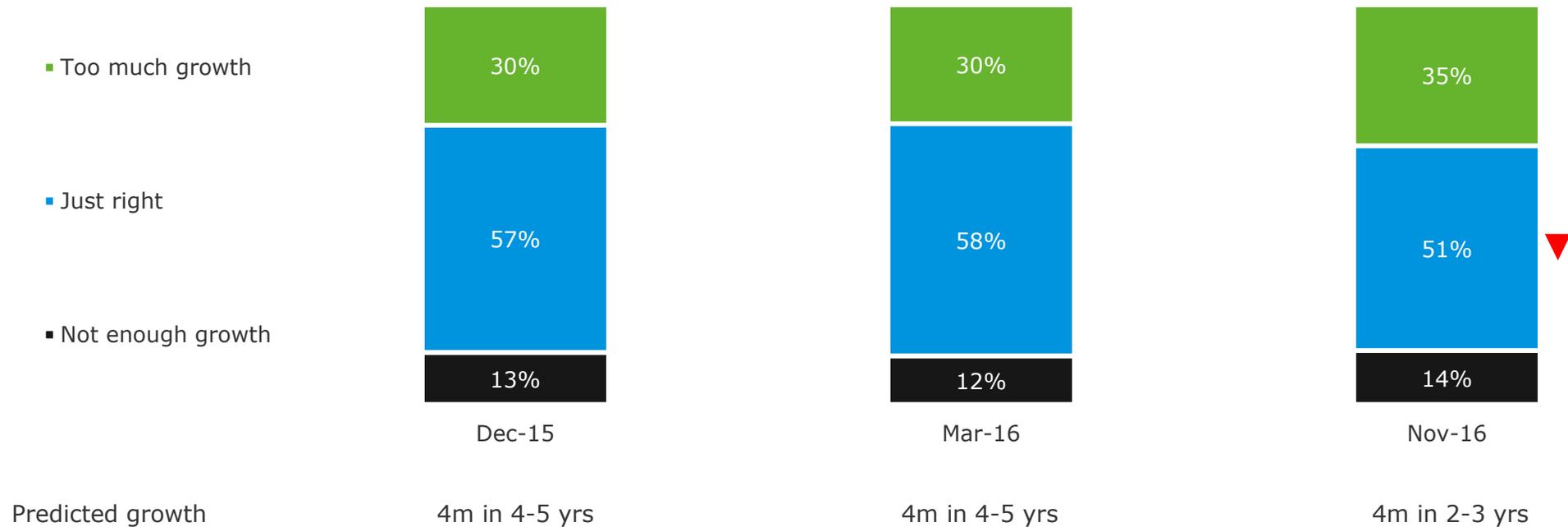
%, Nov-16, those who say some places are under more pressure



▲ ▼ Significantly higher / lower than Dec-15 & Mar-16 at 95% CL

Though the majority of Kiwis continue to believe that 4 million visitors annually is just right, the proportion that believe this is too much growth has indicatively increased

Attitudes towards predicted future growth of annual international visitors  
%, 18+ year olds



Base: Dec-15 N = 502; Mar-16 N = 520; Nov-16 N = 521

▲ ▼ Significantly higher / lower than previous wave at 95% CL

Once again, the lack of infrastructure, the impact on the natural beauty of New Zealand as well as concern around the increased number of tourists in road accidents is driving negative perceptions...

Themed verbatim reasons for there being **too much** predicted growth (35%)

### Lack of infrastructure

- "Having more visitors puts more pressure on infrastructure. Our roads in the cities are busy already. Increased use of accommodation etc., means that councils have to spend more money and ratepayers foot the bill - but councils don't tax the visitors. Also it uses our resources like water and they don't pay for it"
- "I don't think our facilities and infrastructure are expanding to absorb this very seasonal demand"
- "Our infrastructure doesn't support it - we can hardly manage our own population level"
- "The infrastructure is not there to support the increase in tourism. Also, the Department of Conservation needs more funding and new strategic plans to cater for these tourists"
- "The infrastructure won't accommodate it"

### Ruin the natural beauty

- "Environmental effects on our natural beauty. If we are not careful it'll all be gone in the blink of an eye"
- "I think we are close to our limit. Visitors are already ruining some of our natural attractions and growth is beginning to compromise our natural habitat"
- "Overfishing, freedom camping, spreading disease and affecting natural environment"
- "Because we do not currently put enough money into developing infrastructure and safeguards to guard our natural environment at present to cope with that influx"
- "There will be too many people in Auckland and all the touristy places around NZ. Will possibly increase damage to environment and wildlife"
- "Concerned about environmental effect of tourism"

### Driving

- "Don't think we are prepared for that amount of international tourists. Think we need to concentrate on getting our rail system and bus tours up to scratch. Too many international drivers driving rental vehicles"
- "I worry that too many tourists means more traffic accidents due to poor driving. I also am not impressed when this increase could mean more freedom campers who I feel destroy local areas of beauty"
- "Too much congestion on our roads and they need to sit a driving test before being allowed behind the wheel"
- "We need to build the infrastructure to cope. Also need stricter driver (foreign) control/education"
- "It's good for the economy but bad for road accidents"

... while those who think New Zealand should attract more visitors recognise the economic benefits this could deliver

Themed verbatim reasons for there being **not enough** predicted growth (14%)



### Economic growth

- "Any increase in visitors to NZ is a positive, as long as we are planning for increased tourist numbers now"
- "Because it's true. Growth provides more jobs, encourages cultural awareness builds smaller communities makes us part of the big world. Isolationism is a backward step"
- "International visitors are good for the economy and culture of New Zealand"
- "New Zealand's economy depends on tourism"
- "The more tourists the merrier; more jobs for us and a better economy. We can accommodate a much larger tourist infrastructure"
- "We are nowhere near bogged down by tourists yet so more is not going to matter. They also improve our economy"
- "Still heaps of opportunity for tourism and developing it further"
- "Because it will help to keep more people in work"
- "I have not seen any evidence suggesting we cannot take more tourists"
- "Make the most of all the opportunities tourists bring about but manage the industry well"
- "More tourists equals more dollars for our economy"
- "More visitors more money spent, will justify growing the infrastructure"
- "More visitors will create opportunities"
- "NZ could really benefit with more people coming and spending money here - as long as we control the industry to ensure that it is New Zealanders who benefit. I really struggle when I take someone from overseas who wants a souvenir and it says made in China on the label"
- "We need them to come for the economy"

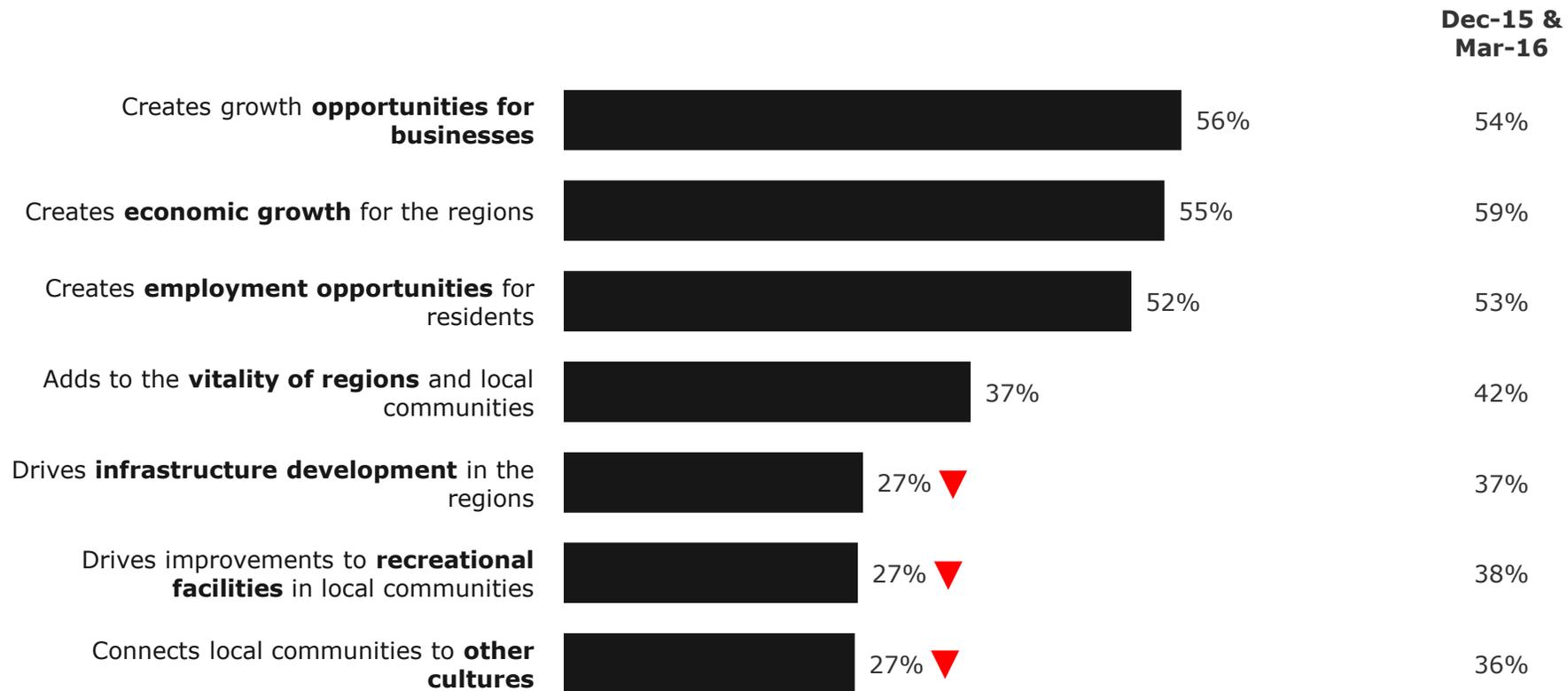
### Brand building

- "New Zealand is a beautiful country. No amount of visitors is enough for any country where admiration can only bring accolades and therefore will positively impact on the country's overall image in the international world"
- "In my opinion tourism is one of the main contributors to the NZ economy. International markets for NZ products can decrease or even fall away. The brand NZ is unique and with the right marketing and handling it can secure a good source of income for NZ residents"

# Commercial benefits continue to be the most recognised pros of international tourism, while significantly fewer people than in previous waves see the social benefits of tourism

## Pros of international tourism

% agree, 18+ year olds, Nov-16



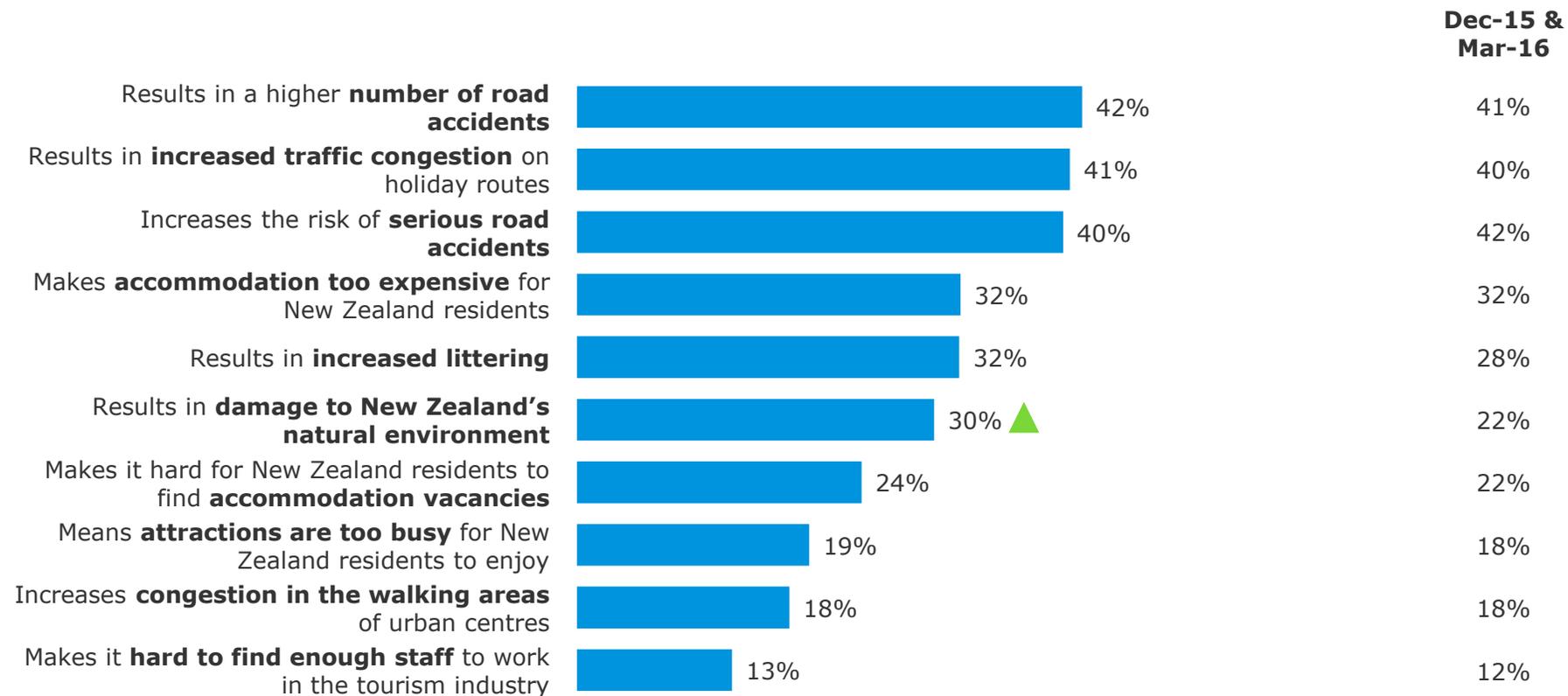
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 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown

▲ ▼ Significantly higher / lower than Dec-15 & Mar-16 at 95% CL

# There is greater concern now than in previous waves about damage to New Zealand's natural environment as a result of international tourism

## Cons of international tourism

% agree, 18+ year olds, Nov-16



Base: New Zealanders aged 18 plus Dec-15 and Mar-16 N = 1,022; Nov-16 N = 521  
 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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# Canterbury and Bay of Plenty residents are less likely to see the benefits of tourism, while people from Otago are the most enthusiastic about the commercial and social growth opportunities that tourism can provide

## Pros of international tourism by region

%, 18+ year olds, Nov-16

	Auckland	Wellington	Bay of Plenty	Other North Island	Canterbury	Otago
Creates growth <b>opportunities for businesses</b>	55%	57%	50%	68%	53%	60%
Creates <b>economic growth</b> for the regions	55%	54%	63%	56%	51%	61%
Creates <b>employment opportunities</b> for residents	54%	53%	51%	53%	47%	54%
Adds to the <b>vitality of regions</b> and local communities	33%	43%	38%	44%	36%	43%
Drives <b>infrastructure development</b> in the regions	27%	30%	35%	28%	25%	36%
Drives improvements to <b>recreational facilities</b> in local communities	23%	29%	43%	34%	23%	26%
Connects local communities to <b>other cultures</b>	24%	32%	30%	30%	21%	35%

Heat map shading is across rows

Base: Auckland N = 101, Wellington N = 108, Bay of Plenty N = 58, Other North Island N = 60, Canterbury N = 105, Otago N = 69  
 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown



# Otago residents are also more cognisant of the negative aspects of international tourism, while Wellingtonians are far less concerned about the cons of tourism than the rest of the country

## Cons of international tourism by region

%, 18+ year olds, Nov-16

	Auckland	Wellington	Bay of Plenty	Other North Island	Canterbury	Otago
Results in a higher <b>number of road accidents</b>	38%	23%	42%	48%	47%	59%
Results in <b>increased traffic congestion</b> on holiday routes	39%	28%	46%	45%	35%	61%
Increases the risk of <b>serious road accidents</b>	36%	25%	46%	42%	50%	58%
Makes <b>accommodation too expensive</b> for New Zealand residents	34%	12%	33%	33%	35%	34%
Results in <b>increased littering</b>	28%	23%	28%	29%	37%	50%
Results in <b>damage to New Zealand's natural environment</b>	34%	15%	30%	25%	28%	36%
Makes it hard for New Zealand residents to find <b>accommodation vacancies</b>	28%	13%	30%	22%	23%	27%
Means <b>attractions are too busy</b> for New Zealand residents to enjoy	20%	14%	23%	17%	12%	24%
Increases <b>congestion in the walking areas</b> of urban centres	18%	11%	23%	16%	11%	38%
Makes it <b>hard to find enough staff</b> to work in the tourism industry	13%	12%	9%	7%	14%	47%

Heat map shading is across rows

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



Those who are particularly negative about tourism are likely to be more concerned about the environmental impact and expense for Kiwis than about road accidents

Cons of international tourism by attitude towards tourism numbers

Most New Zealanders tend to agree that the top three cons of tourism are...

1

Results in a higher number of road accidents

2

Results in increased traffic congestion on holiday routes

3

Increases the risk of serious road accidents

But the top three cons for people that are **most negative**<sup>(1)</sup> about tourism are...

1

Results in damage to New Zealand's natural environment

2

Makes accommodation too expensive for New Zealand residents

3

Results in increased littering

1. Most negative if they answered number of visitors as too high and predicted growth as too much growth and believes the current number of visitors is putting too much pressure on society, infrastructure and environment

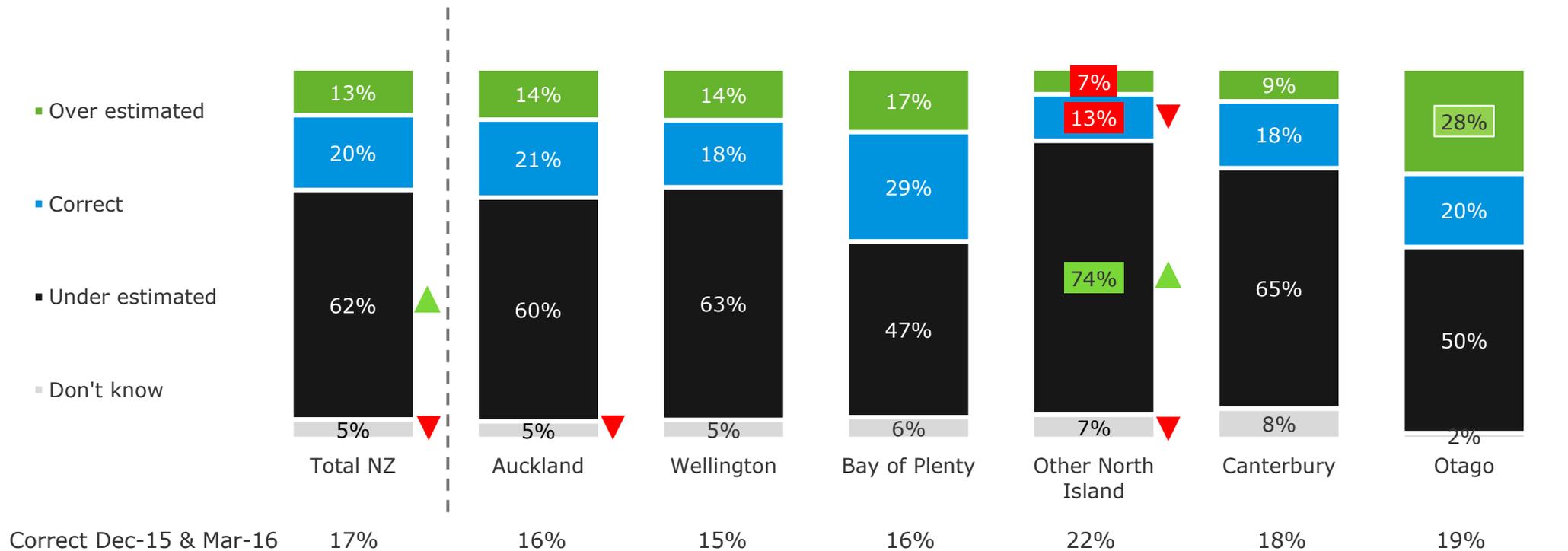
# 4

## Appendix: measures by region

# North Island regions outside the major cities or Bay of Plenty are less likely to correctly estimate annual visitor numbers

## Knowledge of annual visitor numbers – by region

%, Nov-16



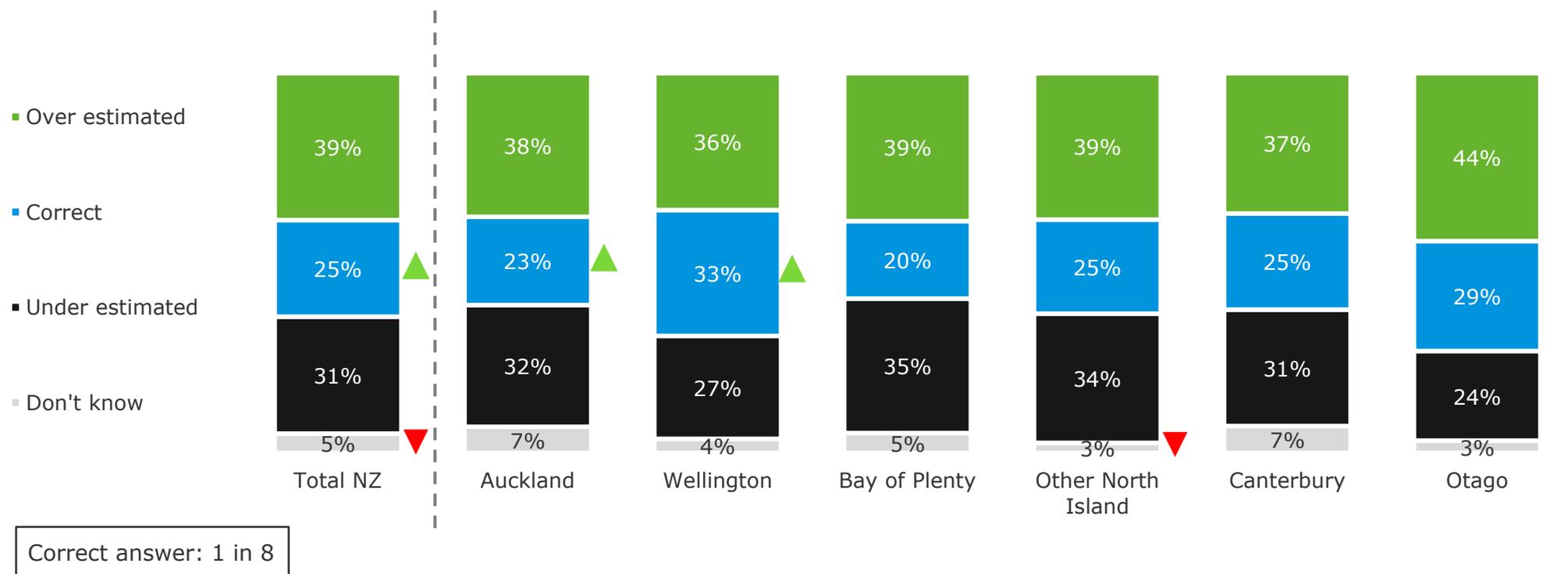
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Significantly higher / lower than other New Zealand at 95% CL

Significantly higher / lower than Dec-15 & Mar-16 at 95% CL

# The improvement seen in correct estimation of employment in the tourism industry at an overall national level are particularly attributable to Auckland and Wellington regions

Knowledge of New Zealand workers employed in the tourism industry – by region  
%, Nov-16

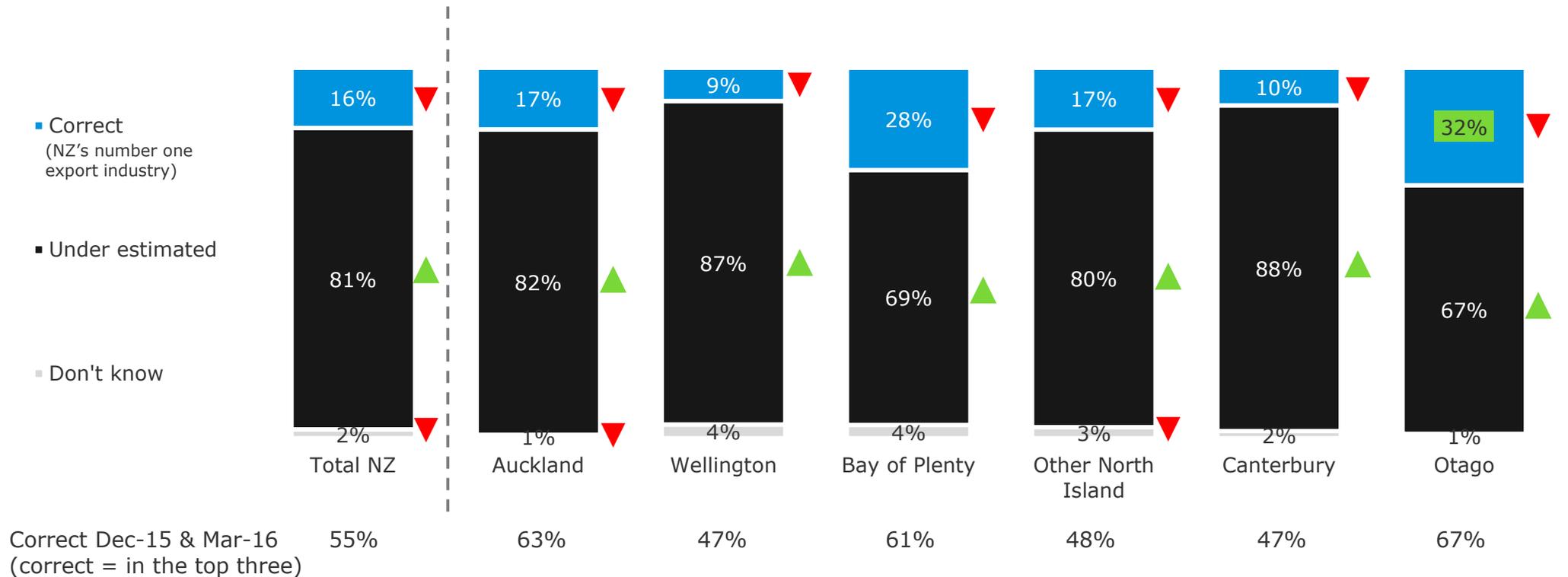


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# New Zealanders living in Bay of Plenty and Otago have the highest knowledge of the value of the tourism industry

## Knowledge of the value of the tourism industry – by region %, Nov-16

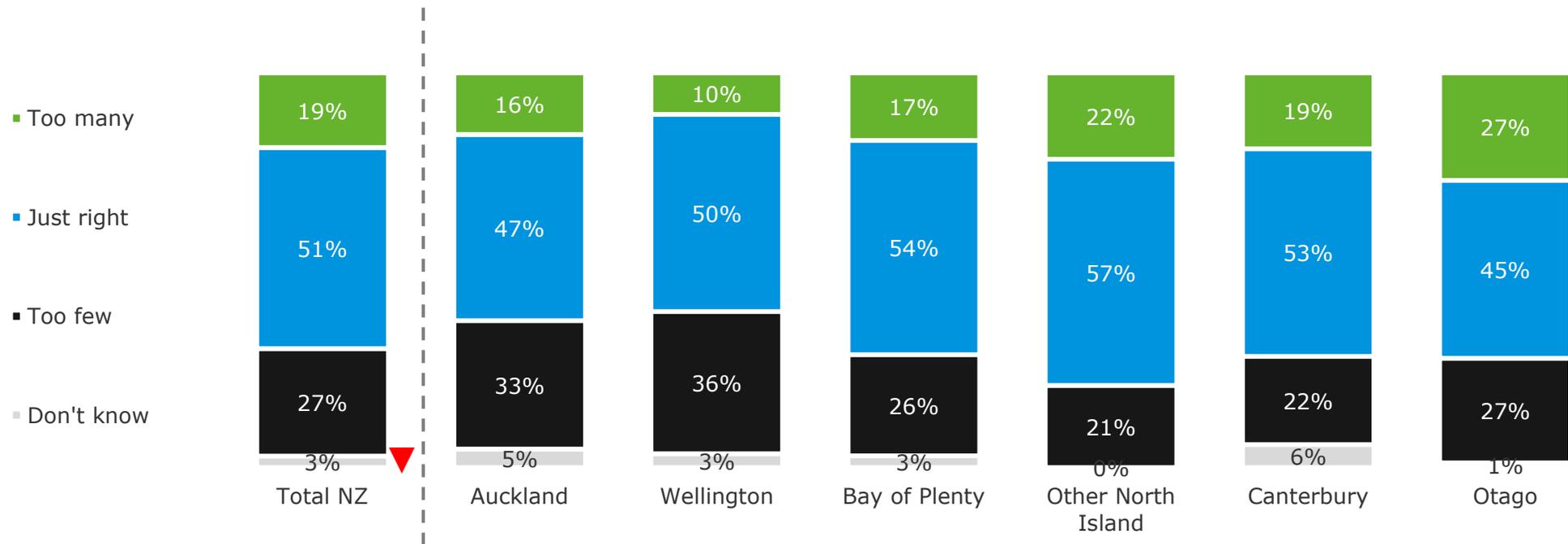


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▲ ▼ Significantly higher / lower than other New Zealand at 95% CL  
▲ ▼ Significantly higher / lower than Dec-15 & Mar-16 at 95% CL

# There is little difference by region in terms of perceptions of the current number of international visitors

Perception of current number of international visitors (based on actual number) – by region  
%, Nov-16



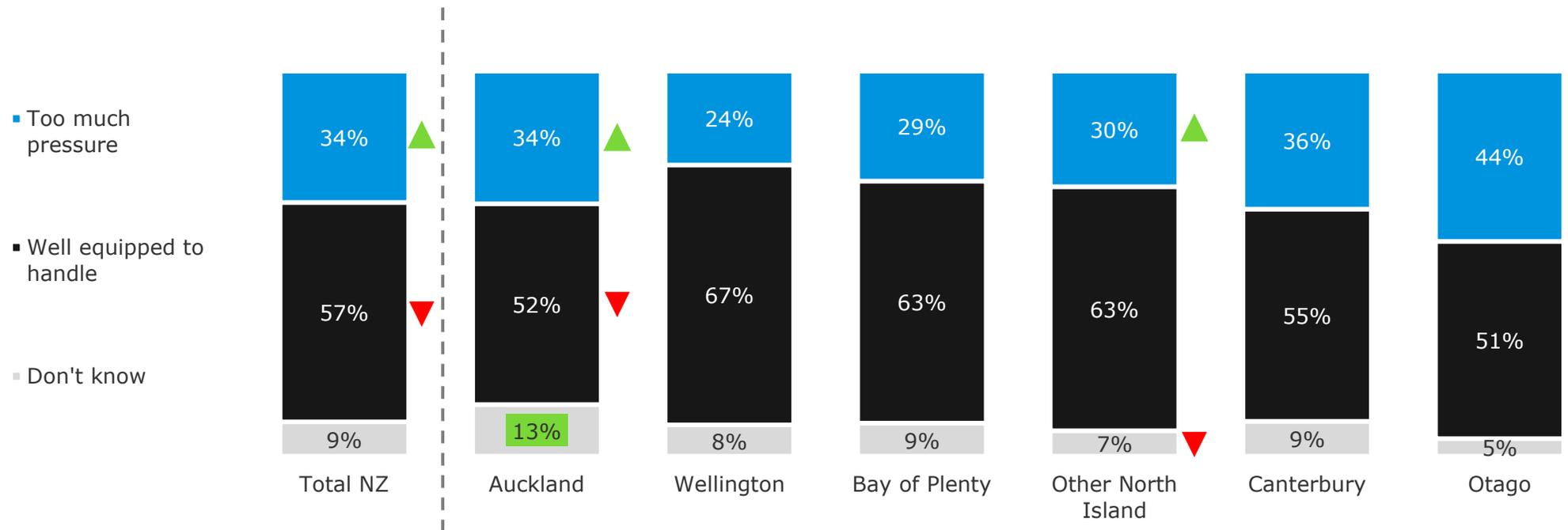
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▲ ▼ Significantly higher / lower than Dec-15 & Mar-16 at 95% CL

# The overall increase seen in agreement that current tourist numbers are placing too much pressure on New Zealand are particularly attributable to Auckland and other North Island regions (not including Wellington and BOP)

## Perceptions of the pressure that tourists put on New Zealand – by region

%, Nov-16



Base: Total NZ N = 521, Auckland N = 101, Wellington N = 108, Bay of Plenty N = 58, Other North Island N = 60, Canterbury N = 105, Otago N = 69

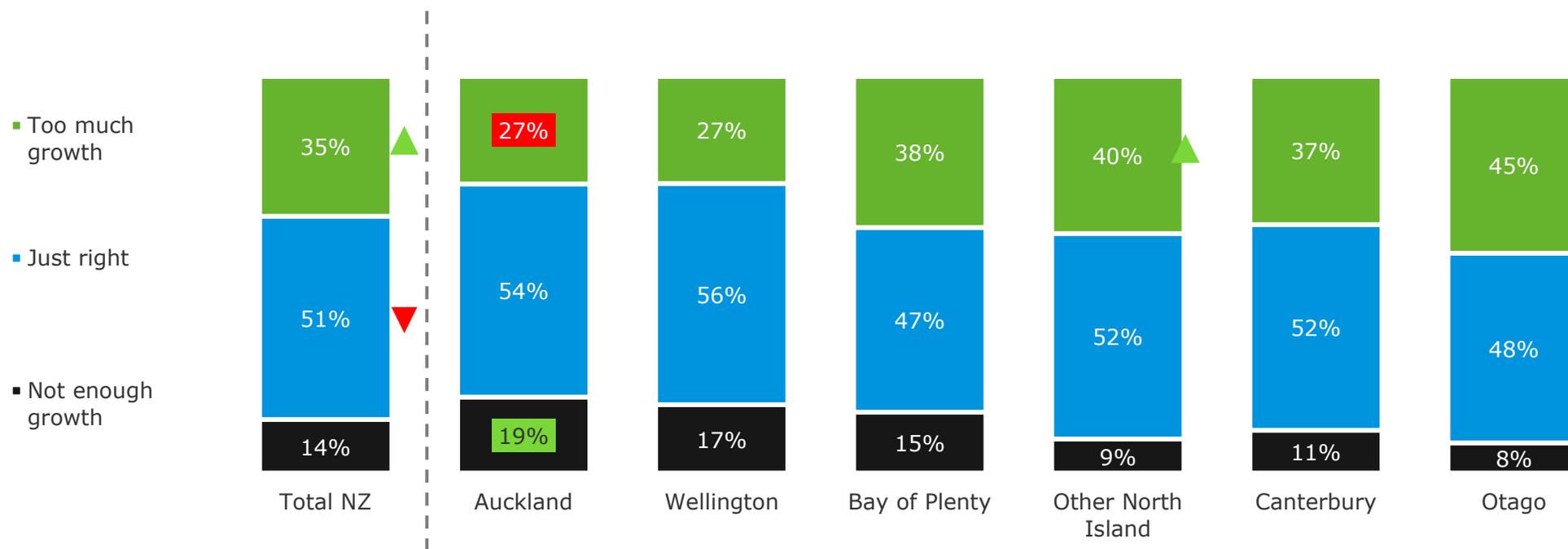
Significantly higher / lower than other New Zealand at 95% CL

Significantly higher / lower than Dec-15 & Mar-16 at 95% CL

# Auckland and Wellington residents are least concerned about too much predicted growth, while those living in Otago express the greatest concern

## Attitudes towards predicted future growth of annual international visitors – by region

%, Nov-16



Base: Total NZ N = 521, Auckland N = 101, Wellington N = 108, Bay of Plenty N = 58, Other North Island N = 60, Canterbury N = 105, Otago N = 69

Significantly higher / lower than other New Zealand at 95% CL

Significantly higher / lower than Dec-15 & Mar-16 at 95% CL