

Mood of the Nation

New Zealanders' perceptions of international visitors

November 2018



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1

Background and approach

Background

- 'Mood of the Nation' is a joint research programme run by Kantar TNS for Tourism New Zealand (TNZ) and Tourism Industry Aotearoa (TIA)
- The purpose of the 'Mood of the Nation' research programme is to provide an insight into New Zealanders' sentiment about international tourism and identify key issues that might negatively impact perceptions and tolerance for further growth
- In order to ensure visitors returning to their home act as unofficial brand ambassadors, it is essential that international visitors continue to have excellent visitor experiences
- TIA's 2025 growth framework aims to increase the value of international and domestic tourism to \$41 billion by 2025, thus the strategic focus is on building value rather than volume
- Tourism 2025 identifies visitor experience as a priority lever to help grow value
- The entire tourism industry has committed to this through Tourism 2025 and TNZ has a key role to play in supporting the achievement of this objective
- TNZ focuses on improving visitor experience and industry by shaping investment in the industry through the provision of market insights and/or marketing capability

Research approach



Method and audience

An online survey of residents in New Zealand aged 18 plus



Sample sizes

From Nov-18, the sample size for this study is approx. n=1080 people (previous n=500), to ensure we provide robust insights at the regional level. We set minimum quotas to ensure sufficient representation from traditional tourism hotspots.

Northland	n = 100	Manawatu-Whanganui	n = 81	Queenstown	n = 102
Auckland region	n = 99	Wellington region	n = 101	Elsewhere in Otago	n = 51
Rotorua	n = 50	Other North Island	n = 30	West Coast	n = 100
Gisborne / Hawkes Bay	n = 100	Christchurch	n = 106	Other South Island	n = 20
Taranaki	n = 100	Elsewhere in Canterbury	n = 44		



Fieldwork dates

Wave 1: 2nd to 6th of December, 2015

Wave 2: 17th March to 2nd April, 2016

Wave 3: 7th to 17th November, 2016

Wave 4: 13th to 22nd March, 2017

Wave 5: 13th to 23rd November, 2017

Wave 6: 5th to 21st March, 2018

Wave 7: 31st October to 13th November, 2018



Weighting

Respondents were weighted by gender, age and region to be representative of the New Zealand population based on 2017 population estimates.

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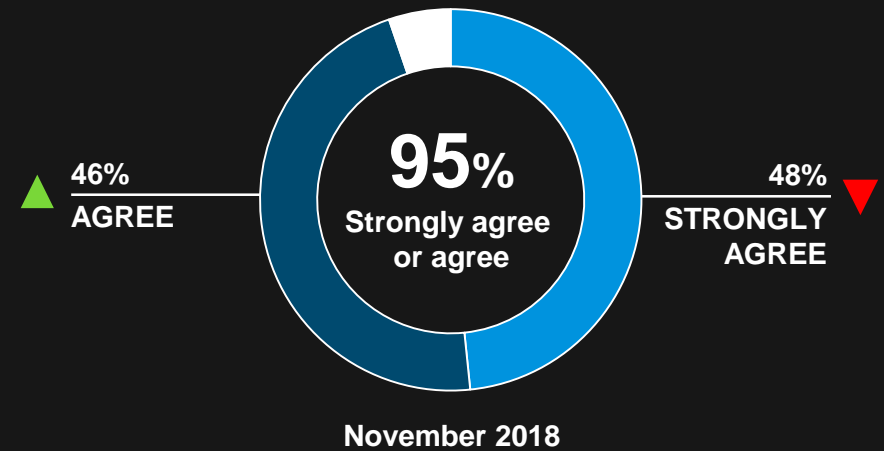
Key insights

KEY INSIGHTS (page 1 of 3)

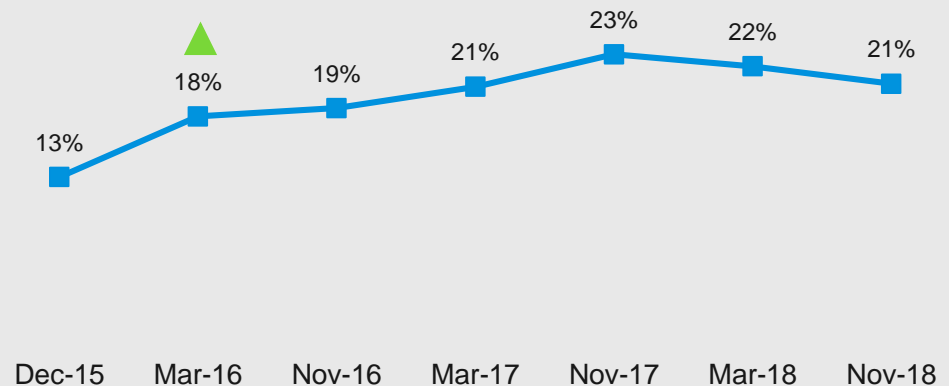


- Nearly all New Zealanders agree that international tourism is good for New Zealand
- Most people are proud that New Zealand is an attractive tourist destination and are welcoming of international visitors
- Over the years there has been an increase in the proportion of New Zealanders who think that the number of tourists is too high (currently at 21%)
- However, this trend has now stabilised, and the prevailing view (45%) remains that New Zealand attracts just the right number of international visitors

IS INTERNATIONAL TOURISM GOOD FOR NEW ZEALAND?



PERCEPTIONS THAT CURRENT NUMBER OF VISITORS IS TOO HIGH

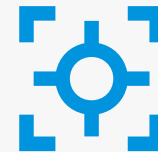
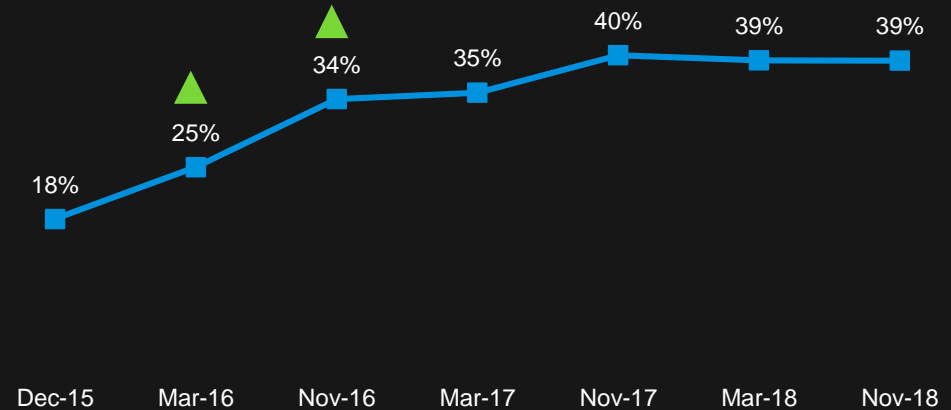


KEY INSIGHTS (page 2 of 3)



- The percentage of New Zealanders who think that international tourism puts too much pressure on New Zealand has been trending upwards since December 2015, but is now stable at 39%
- This view is driven by three key factors: (a) perceptions that New Zealand lacks infrastructure to support the growing number of tourists; (b) perceived adverse impact of tourism on the environment; (c) perceived impact on road congestion and safety
- Queenstown and Auckland are consistently seen as the areas under the most pressure
- New Zealanders' views on the impact of tourism on the country continue to be strongly influenced by personal experiences and information in the national media outlets

PERCEPTIONS THAT TOURISTS PUT TOO MUCH PRESSURE ON NEW ZEALAND



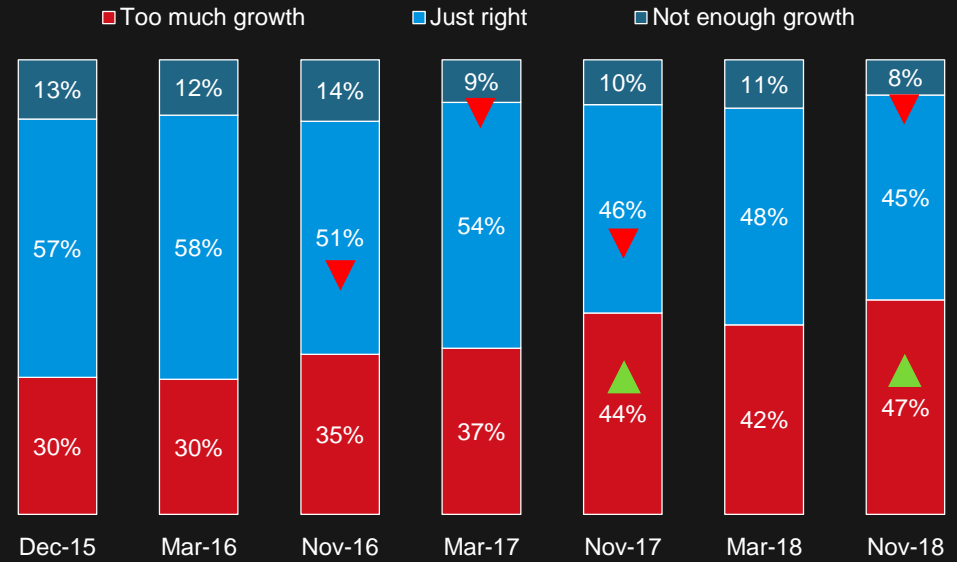
Top 5 ways tourism applies pressure

- Pressure on infrastructure
- Accommodation shortage
- Environmental damage
- Increased traffic congestion
- Declining road safety



- The proportion of New Zealanders who believe the predicted international visitor growth is “too much” has been trending upwards since December 2015. It has now increased to 47% of New Zealanders

PERCEPTIONS OF PREDICTED GROWTH



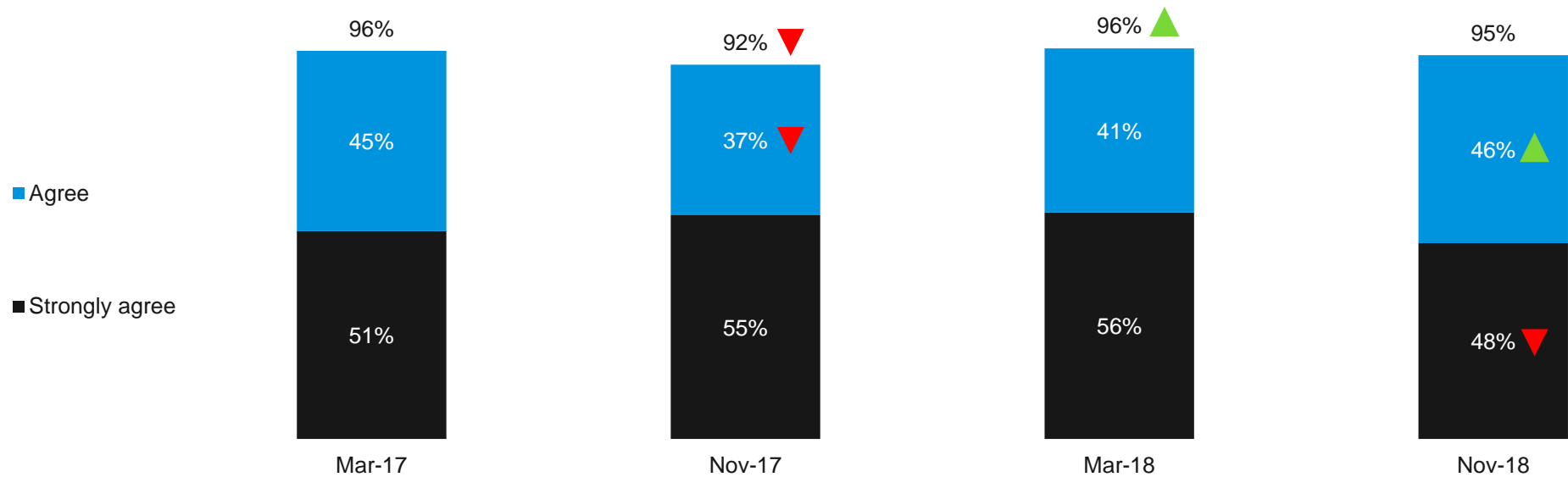
3

Detailed insights

Overall, nearly all New Zealanders agree that international tourism is good for the country, however this wave there is a drop in the proportion of Kiwis who strongly agree with this statement compared to March 2018

International tourism is good for New Zealand

% agree, 18+ year olds



Base: New Zealanders aged 18 plus: Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084

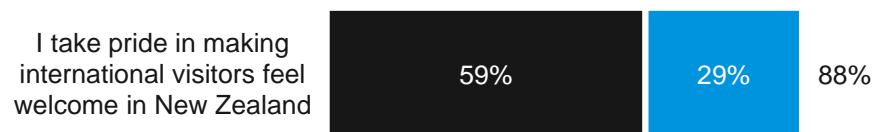
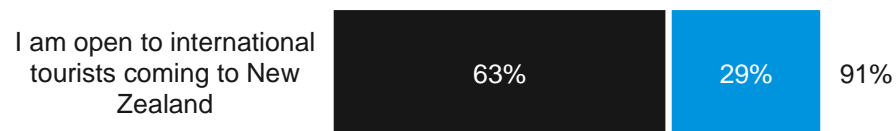
▲ Significantly higher / lower than previous wave at 95%

Most New Zealanders agree that they themselves are open and welcoming of international tourists, however they are far less likely to agree that other New Zealanders feel the same way; this is stable from the previous wave

Attitudes towards international visitors

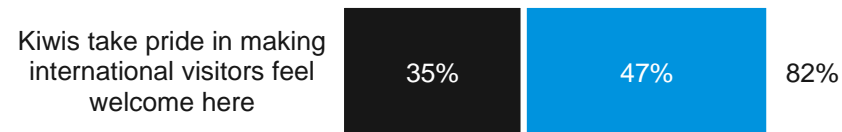
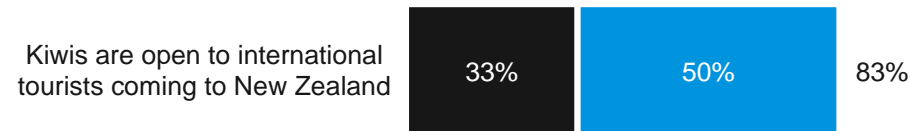
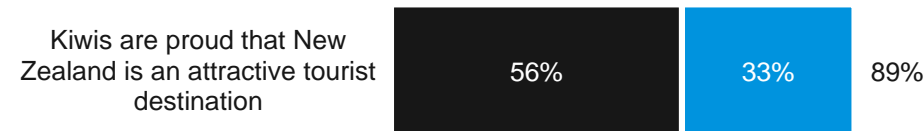
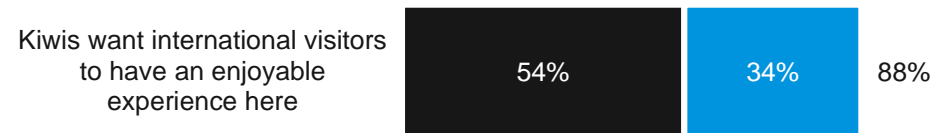
% agree, 18+ year olds, Nov-18

Personal perceptions



■ Strongly agree ■ Somewhat agree

Perceptions of how other New Zealanders feel



▲ Significantly higher / lower than previous wave at 95%

Base: New Zealanders aged 18 plus: Nov-18 n = 1,084

Personal experience and information in the national media outlets continue to have the most influence on the views New Zealanders have about international tourism

What influences the opinions on international tourism

18+ year olds, Nov-18

		<u>Level of influence</u>	
		1 st most significant	2 nd most significant
1	What I experience first-hand in my daily life	43%	21%
2	What I see / hear about tourism from national media outlets	39%	12%
3	What I hear from friends / family / colleagues that they experience first hand in their daily lives	8% ▼	40%
4	What I see / hear about tourism from regional media outlets	5% ▲	18%
5	What I see / hear about tourism from local media outlets	5%	10%

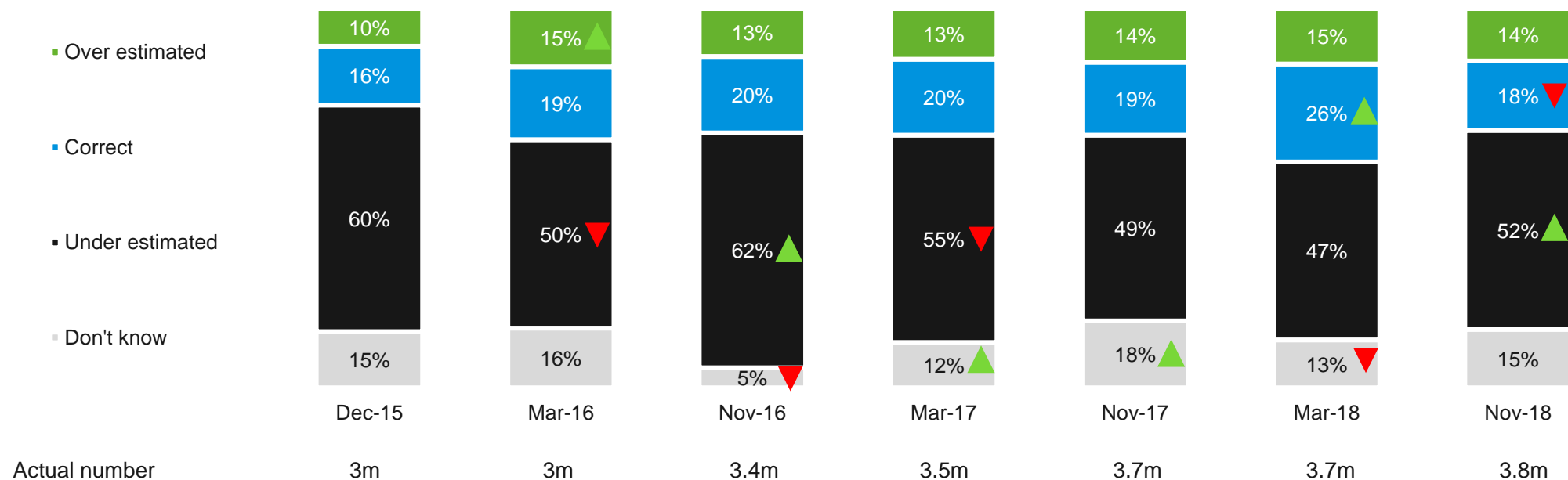
Base: New Zealanders aged 18 plus: Nov-18 n = 1,084

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

The proportion of New Zealanders who know how many international visitors New Zealand attracts annually has decreased significantly compared to March 2018, and the majority still underestimate this number

Knowledge of annual visitor numbers

%, 18+ year olds



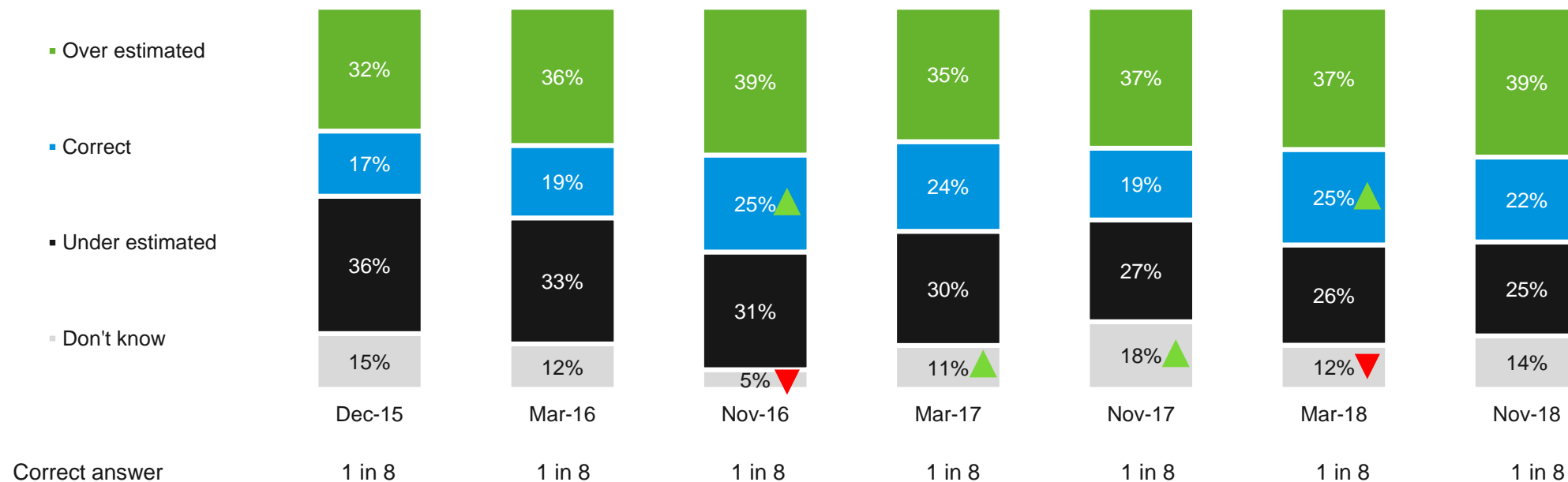
Base: New Zealanders aged 18 plus: Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084

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

Most New Zealanders overestimate the number of people directly or indirectly employed in the tourism industry

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

%, 18+ year olds



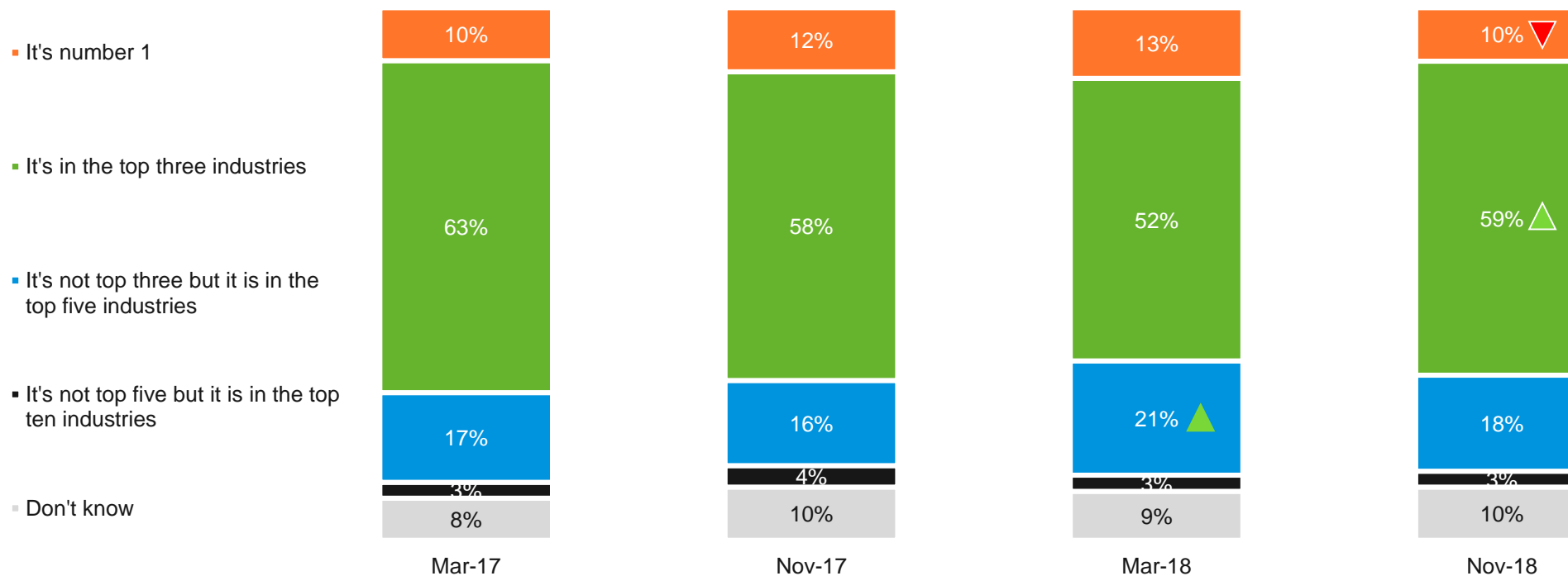
Base: New Zealanders aged 18 plus: Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084

▲ Significantly higher / lower than previous wave at 95%

70% of New Zealanders know that tourism is one of the top three revenue earners for the country, however only 10% know that it's number one

Knowledge of the value of the tourism industry

%, 18+ year olds



Base: New Zealanders aged 18 plus: Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084

▲ Significantly higher / lower than previous wave at 95%

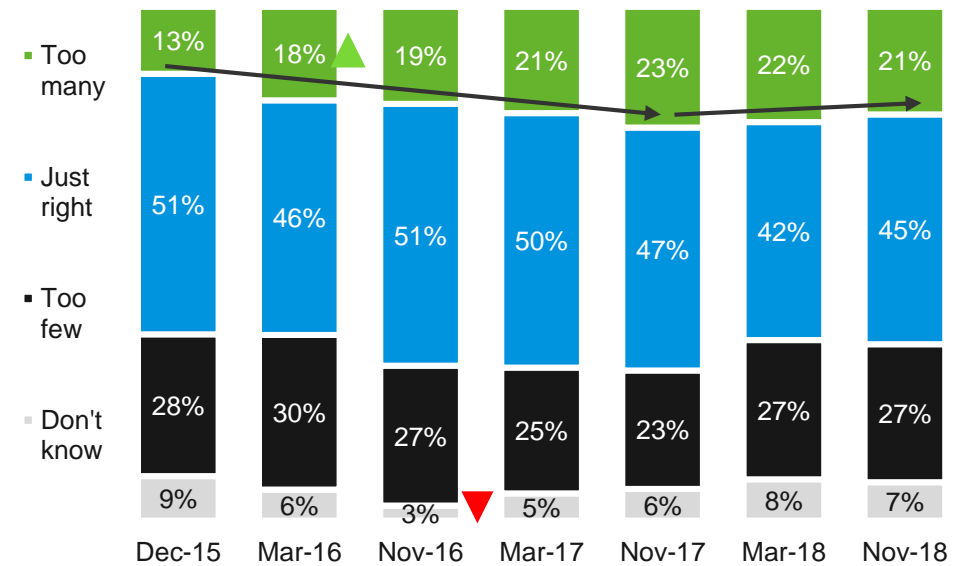
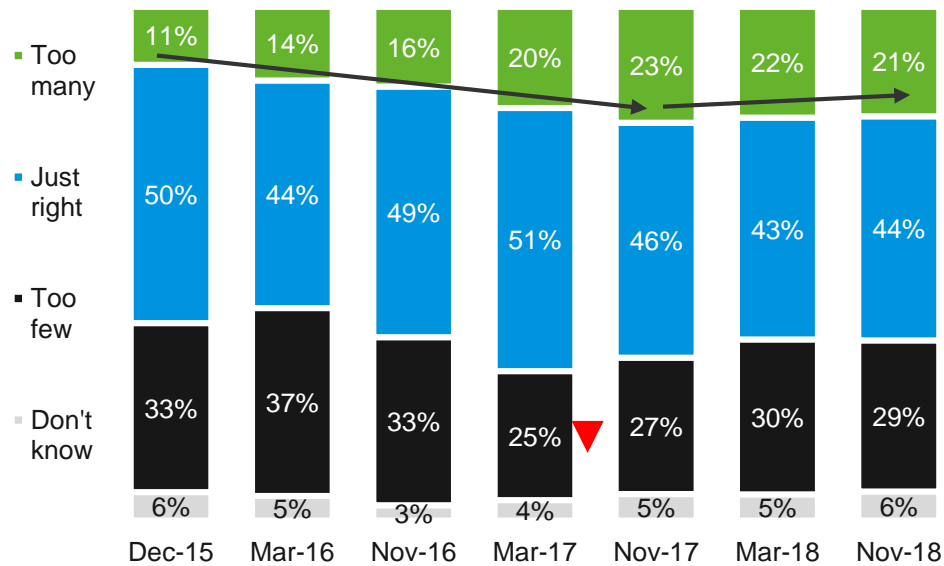
The common view is that New Zealand attracts just the right number of international visitors and only one in five New Zealanders think that the country attracts too many international visitors; a stable result over the past year

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; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084

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

A lack of adequate infrastructure, overcrowding and concerns around road safety are some of the top reasons why some New Zealanders feel there are too many international visitors, consistent with previous waves

Themed verbatim reasons for there being **too many international visitors (21%)**



Lack of Infrastructure

- “Infrastructure cannot cope – not enough hotel rooms, poor roading, pressure on resources”
- “Our infrastructure is inadequate. Freedom camping is ruining our image”
- “Small town infrastructures can’t cope”
- “We are not yet ready for so many tourists, we do not have enough infrastructure in place, especially in small towns. The government needs to step up and help because the local councils cannot do it alone”
- “The numbers are growing faster than our ability to provide infrastructure”
- “Because the infrastructure cannot cope with the influx of tourists and adversely impacts the local community. The profits made by businesses is not directly invested back to infrastructure”
- “NZ doesn’t have the infrastructure in the regions to cope with the numbers”

Overcrowding

- “Places are being overrun with tourists”
- “The country is full of tourists at all times of year, the airports are crowded”
- “Over crowded facilities”
- “There are reports of our national parks under strain from overseas visitors, so we seem to be heading to a saturation point in some areas, and our native bush/national parks are being over used, and burdened with waste from international visitors”
- “Popular spots getting too crowded”
- “Our most popular destinations are getting overrun and are losing the very uniqueness that attracts tourists”
- “Because everywhere you go the tourist centres are overcrowded”
- “Some of our naturally beautiful spots are being destroyed by too many sightseers”

Road safety

- “Cause too many accidents in rental cars”
- “Road accidents caused by or involving visitors”
- “Our roads are not coping with international drivers in some areas”
- “Our infrastructure is not built for the numbers, the roads are too busy”
- “Major problem with inappropriate driving and parking”
- “The roads are dangerous due to the number of tourists and the lack of licensing”
- “A lot of accidents come from visitors according to media”
- “Attracting visitors is nice but letting them drive without taking a driving test causes so many crashes”
- “It’s become so dangerous on the roads, especially living in a popular tourist area”

Base: n = 247

Perceived economic benefits to New Zealand, employment opportunities, and perceptions that there is still spare capacity are the main driving factors behind why some New Zealanders feel there are too few international visitors

Themed verbatim reasons for there being **too few** international visitors (29%)



Economic Benefits and Job Creation

- “Tourists are good for the economy and force investment in infrastructure. Tourism also supports employment”
- Dairy will be diminishing. We need the extra income as well as more jobs”
- “Tourists are good for the whole economy, they bring money in, lots of people are employed to look after them”
- We could always use more for the New Zealand economy - more tourist more spending more jobs better economy. Is there really a limit?”
- “We are not over run with tourists at this stage and could do with a few more to help the economy”
- “I think we could add another 1-2m and that would add to our economy”
- “We are getting more Chinese visitors every year and we need to work on this number increasing. They have so much money to spend as tourists and we need to tap into this potential multi million dollar tourist industry”
- “The more the better, especially where we live, the local economy is relying on visitors”
- “It’s always good to have more, brings money into the economy and more jobs”
- “ “We have a beautiful country and more people need to see it plus its great for our economy”
- “From what I have seen in the media it is too expensive for a lot of international tourists and we could benefit from more visitors”
- “More will generate more income to upgrade all facilities”

Managed Expansion

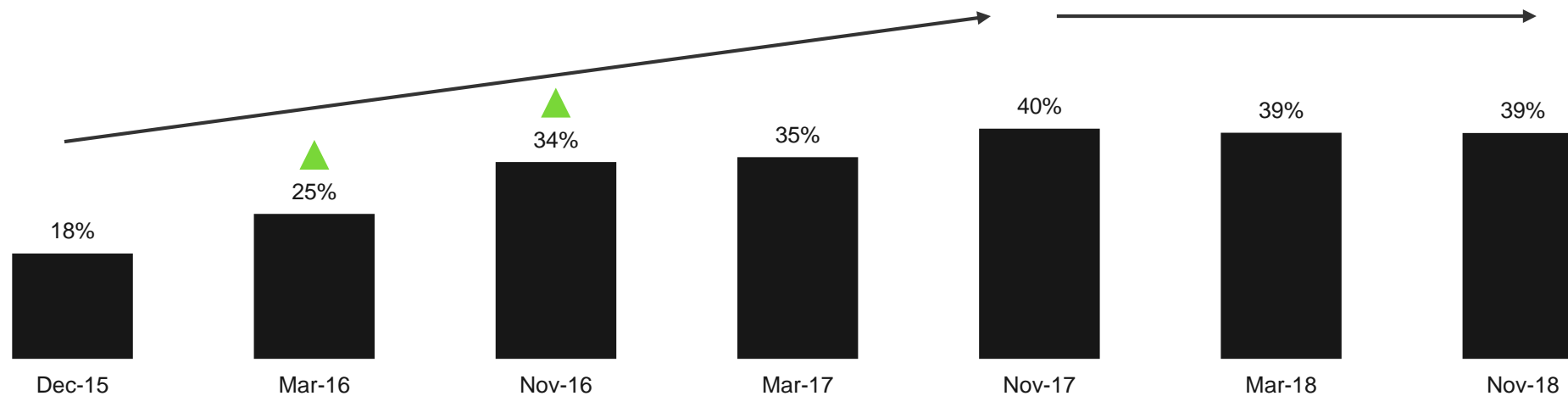
- “We have the space & infrastructure, if managed properly, to be able to cope with more tourists”
- “tourists are good for our economy, but we don't want too many if we don't have the infrastructure”
- “Our economy could do with more visitors, however there needs to be education and a responsibility towards the environment, as well as sustainability initiatives”
- “If our infrastructure can handle more visitors, let them in”
- “We could have more visitors but need the infrastructure to be able to cater for them”
- “We probably need more to boost the economy but it’s nice to keep NZ the way it is. without being overloaded with tourists”
- “There is room for expansion, but you wouldn't want the country over-run with tourists”

Base: n = 280



39% of New Zealanders think the current number of international tourists puts too much pressure on New Zealand; this has been stable over the past year

Perceptions that tourists put too much pressure on New Zealand

%, 18+ year olds



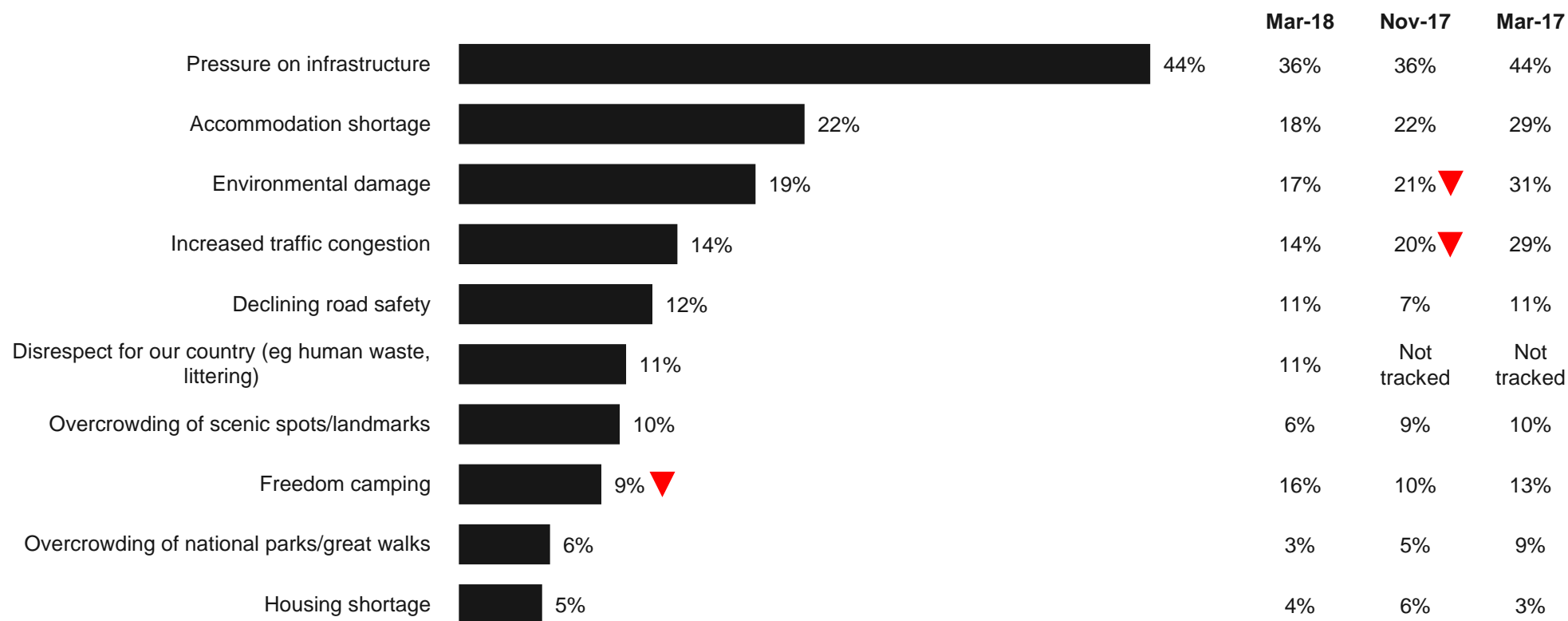
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  Significantly higher / lower than previous wave at 95%

Pressure on infrastructure continues to be the top concern New Zealanders have with international tourism, while concerns around freedom camping have decreased significantly compared to March 2018 which is likely to be a seasonal trend

Perceptions of how tourism puts pressure on New Zealand

%, those who say "too much pressure", Nov-18



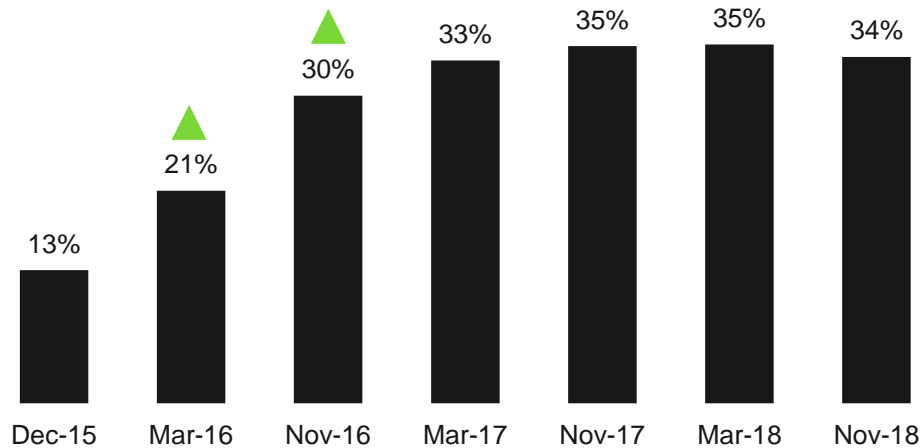
Base: Those who say "too much pressure": Nov-18 n = 449
Notes: Based on unprompted verbatim

▲ Significantly higher / lower than previous wave at 95%

A third of New Zealanders continue to believe that some places are under more pressure than others; Queenstown and Auckland continue to be the main places perceived to be under more pressure than others

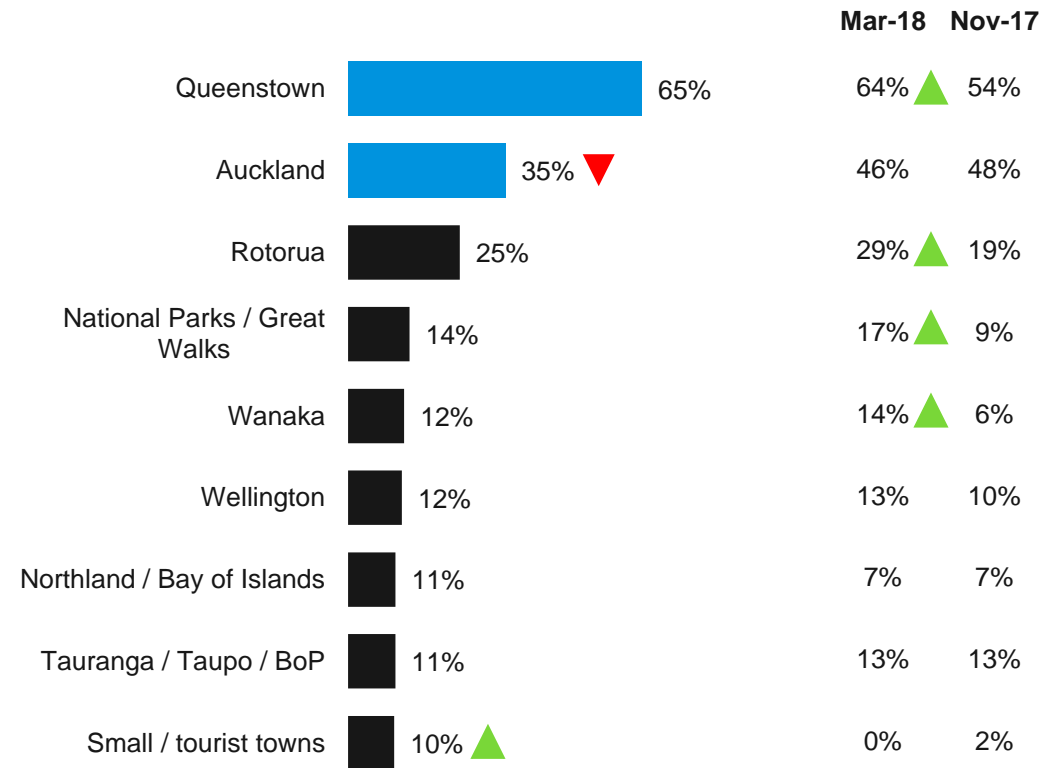
“Some places are under more pressure”

% agree, 18+ year olds



Which places?

%, Nov-18, those who say some places are under more pressure

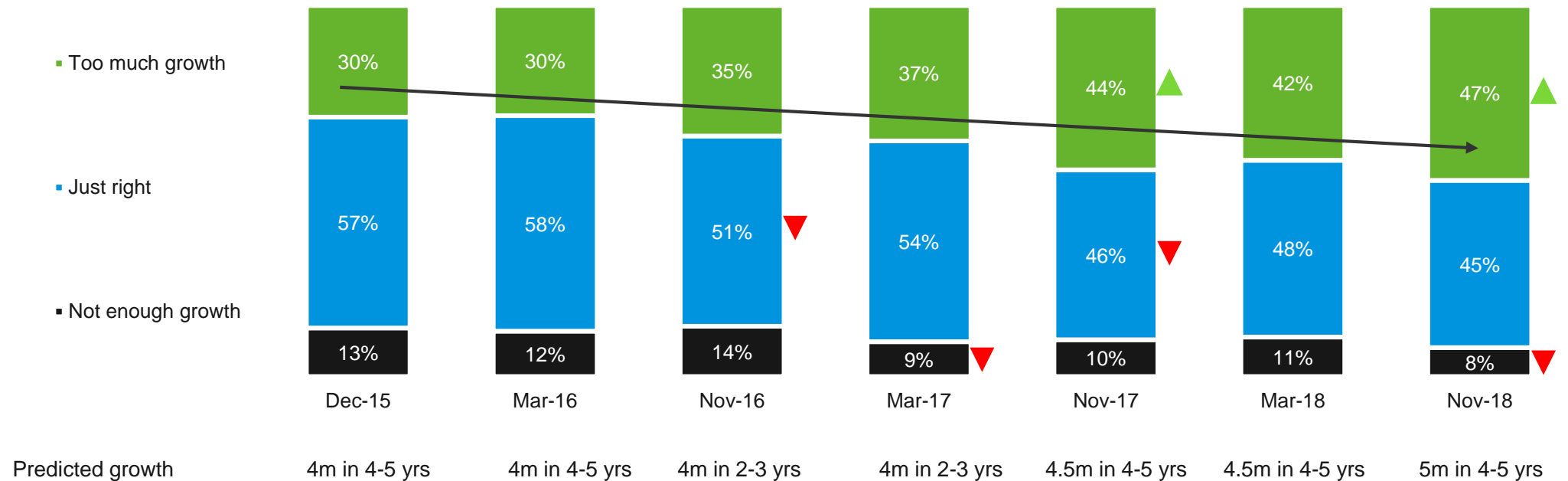


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▲ ▼ Significantly higher / lower than previous wave at 95%

The proportion of New Zealanders that feel the predicted future growth of international visitors is too high has been trending upwards since December 2015, and has increased significantly in November 2018

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



Base: New Zealanders ages 18 plus: Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084

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

A lack of adequate infrastructure and overcrowding are the key reasons why New Zealanders feel there is too much predicted growth

Themed verbatim reasons for there being **too much predicted growth** (47%)



Lack of infrastructure

- “NZ infrastructure can’t handle the substantial growth of international visitors, while also trying to cope with substantial growth of population”
- “Our infrastructure doesn’t increase very fast so increasing the number of visitors by that much will potentially change the vibe of popular tourist destinations”
- “Facilities to cope - more toilets and stopping places and suitable freedom camping areas”
- “We don’t have public transport or facilities in place to meet demand”
- “A big increase without adjusting the spending on the infrastructure of New Zealand might not be a good idea. Upgrading roads, making sure native areas are better protected etc”
- “Unless a major amount of money is poured into our infrastructure and roading, including accommodation toilets etc. there will be chaos in our cities and rural areas”

Environmental damage

- “May start to have a significant effect on the environment, and become unmanageable”
- “Concerned about negative impacts on the environment”
- “They come to see paradise but it is being destroyed in the process. Part of the beauty is in the low numbers of our population; wilderness is not full of people”
- “We pride ourselves on being a green country, with more people visiting this could be sabotaged”
- “Educating visitors on appropriate treatment of our natural environment needs to keep up with numbers”
- “I think 3.8m is more than enough. It is wrecking the environment”
- “Environmental impacts and sustainability”

Overcrowding

- “We are small and are being overwhelmed at tourist hotspots”
- “It depends where they go. Another million through places like Queenstown and the Coromandel is a nightmare”
- “I don’t want it to be too busy, I like that NZ is quiet”
- “Too many tourists can ruin the places they come to visit”
- “We are a country of 4.5 million but feel like we are a country of 10 million, in places”
- “Our roads will get too blocked and the tourist attractions too crowded”
- “Roads will get busier, shops and beaches more crowded”
- “Experience overseas tells me that unrestricted tourism ruins the experience, ie France”

Base: n = 544

Economic growth and perceptions that we have capacity to accommodate more visitors if the growth is well managed are the main reasons why New Zealanders think there is not enough predicted growth

Themed verbatim reasons for there being **not enough** predicted growth (8%)



Economic growth

- “As commodity markets wane, tourism will be a good alternative”
- “Because its needed for economy growth”
- “We as a country can always do better and everyone benefits from the increased economy”
- “They come here and spend money. This improves our GDP and can improve our services”
- “Need more to boost the economy”
- “Because tourism should be our priority for this country's future economy”
- “More tourist stimulates economic opportunities”
- “We can always do with more tourists as they generate revenue for our businesses”
- “More people more money”

Managed growth

- “I think we need to encourage more visitors as that increases our overall GDP but once again, we're limited, particularly in smaller rural communities with the infrastructure. Small communities struggle with Council rates to build the facilities to accommodate these extra visitors”
- “With the right infrastructure we can cater for more”
- “There are still off seasons around this area. If we can bring people around off season, it is not a problem”
- “We have the destination just need more infrastructure”
- “The more the merry provided we can accommodate them”
- “We need the income but we have to expand the infrastructure”

Capacity for more

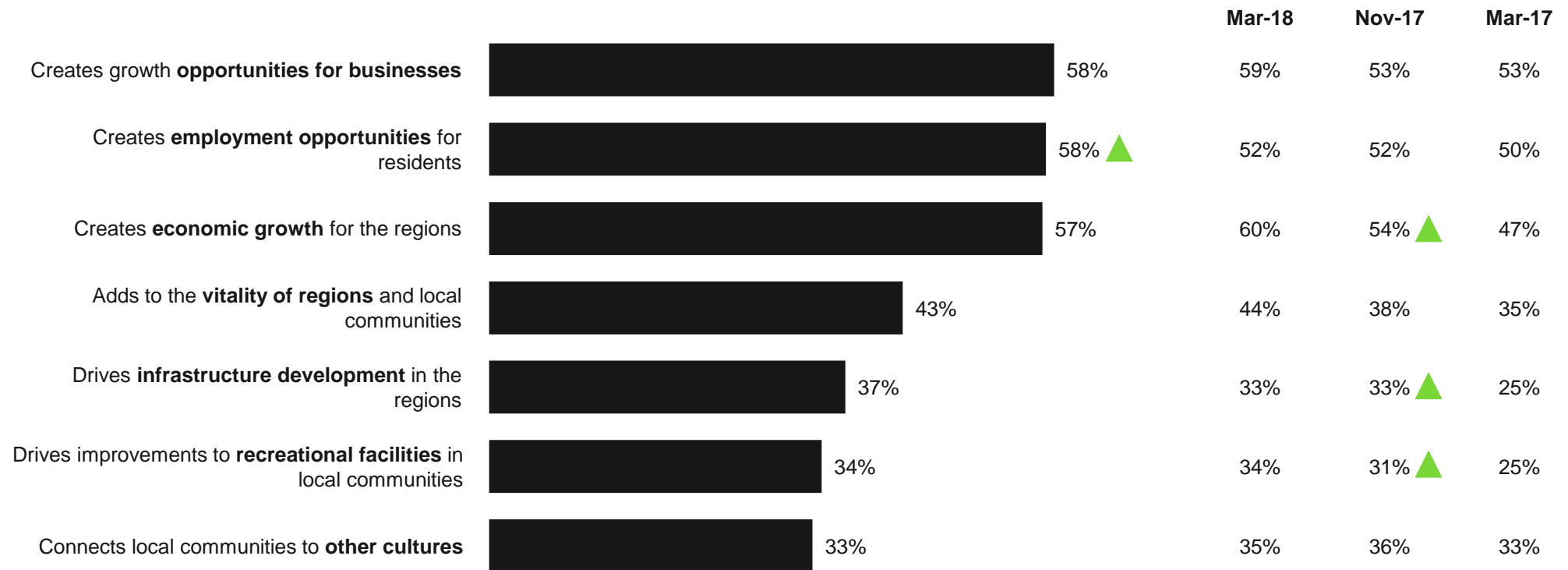
- “If we have the room let them come. The more that come the more friends our country will have”
- “The more the better”
- “We are a beautiful country - let's share it!!”
- “If we are at 3.8m now 5m in 5 years time isn't huge growth”
- “We have plenty of empty spaces in NZ to explore. Get the tourists out of the main cities and show them the real NZ”
- “Room for more”
- “It should be doubled and it should be easily achievable”

Base: n = 88

Key perceived benefits of tourism centre around economic benefits and employment; employment opportunities for locals as a predicted benefit shows a significant increase from March 2018

Pros of international tourism

% agree, 18+ year olds, Nov-18



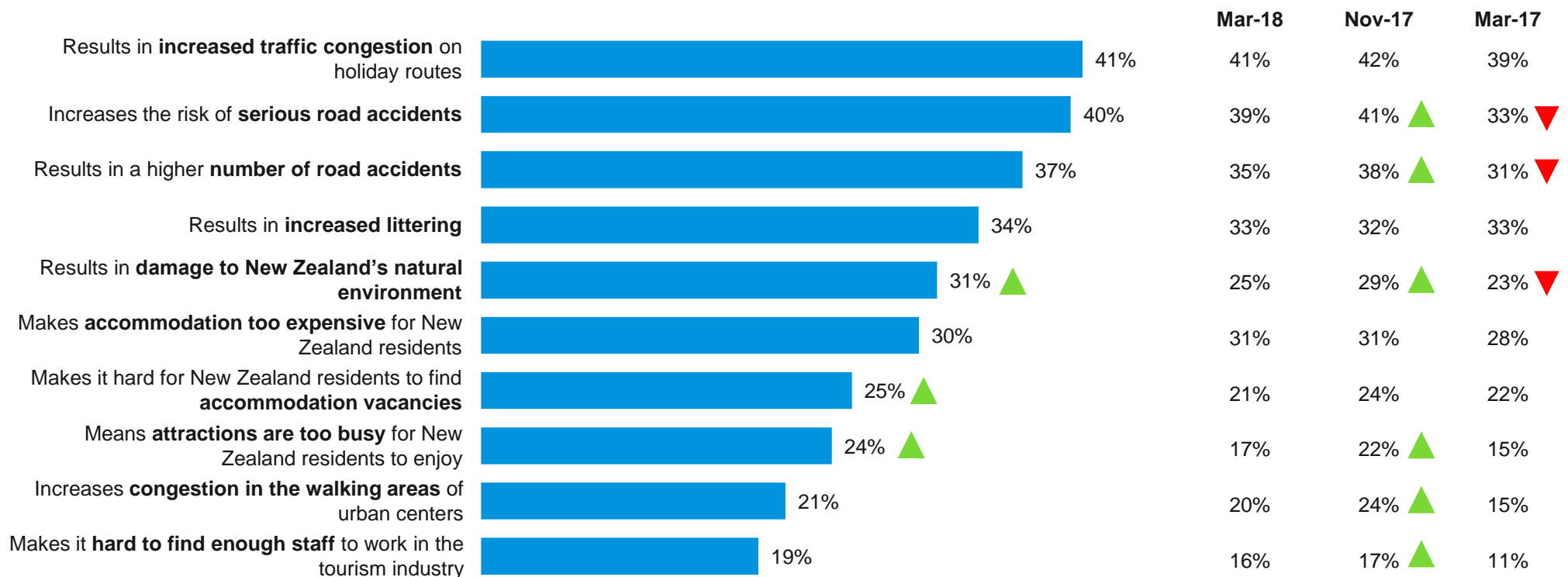
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 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown

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

There has been a significant increase in perceived adverse impact of tourism on the environment and ease of domestic travel (possibly a seasonal trend); traffic congestion and road safety continue to be the main concerns for New Zealanders

Cons of international tourism

% agree, 18+ year olds, Nov-18



Base: New Zealanders aged 18 plus: Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084
 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 previous wave at 95%

The strength of perceived benefits of international tourism varies by region, with residents of Gisborne / Hawkes Bay and West Coast having some of the weakest perceptions of benefits of tourism

Pros of international tourism by region

% agree, 18+ year olds, Nov-18

	Northland	Auckland	Bay of Plenty	Gisborne /Hawkes Bay	Taranaki	Manawatu-Whanganui	Wellington	Canterbury	Otago	West Coast
Creates growth opportunities for businesses	63%	62%	52%	51%	53%	51%	58%	59%	65%	52%
Creates employment opportunities for residents	52%	66%	59%	45%	50%	54%	57%	55%	68%	46%
Creates economic growth for the regions	57%	60%	46%	50%	59%	59%	51%	60%	64%	49%
Connects local communities to other cultures	30%	32%	30%	23%	39%	40%	35%	32%	41%	33%
Adds to the vitality of regions and local communities	44%	50%	51%	37%	38%	46%	34%	39%	42%	39%
Drives infrastructure development in the regions	34%	46%	28%	21%	33%	38%	28%	34%	36%	31%
Drives improvements to recreational facilities in local communities	30%	37%	41%	34%	34%	33%	28%	35%	33%	34%
<i>Base n =</i>	100	99	60	100	100	81	101	150	153	100

Heat map shading is across rows

Base: Auckland n = 99, Wellington n = 101, Bay of Plenty n = 60, Other North Island n = 401, Canterbury n = 150, Otago n = 153
 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown



Perceptions of negative impact of tourism are strongest among those residing in the South Island, and Otago especially

Cons of international tourism by region

% agree, 18+ year olds, Nov-18

	Northland	Auckland	Bay of Plenty	Gisborne /Hawkes Bay	Taranaki	Manawatu-Whanganui	Wellington	Canterbury	Otago	West Coast
Results in increased traffic congestion on holiday routes	38%	33%	46%	40%	39%	38%	40%	49%	61%	66%
Increases the risk of serious road accidents	42%	32%	41%	50%	43%	38%	35%	48%	59%	64%
Makes accommodation too expensive for New Zealand residents	25%	26%	29%	22%	27%	35%	28%	39%	46%	39%
Results in increased littering	34%	22%	32%	37%	28%	33%	37%	44%	53%	54%
Results in a higher number of road accidents	39%	30%	40%	49%	35%	34%	33%	43%	55%	61%
Increases congestion in the walking areas of urban centres	21%	19%	15%	24%	10%	13%	23%	21%	34%	28%
Results in damage to New Zealand's natural environment	30%	24%	28%	36%	30%	32%	39%	39%	41%	40%
Makes it hard to find enough staff to work in the tourism industry	16%	15%	19%	14%	16%	16%	12%	24%	41%	23%
Makes it hard for New Zealand residents to find accommodation vacancies	21%	19%	25%	26%	23%	25%	31%	32%	42%	27%
Means attractions are too busy for New Zealand residents to enjoy	21%	21%	22%	21%	13%	19%	28%	33%	31%	27%
	Base n = 100	99	60	100	100	81	101	150	153	100

Base: Auckland n = 99, Wellington n = 101, Bay of Plenty n = 60, Other North Island n = 401, Canterbury n = 150, Otago n = 153

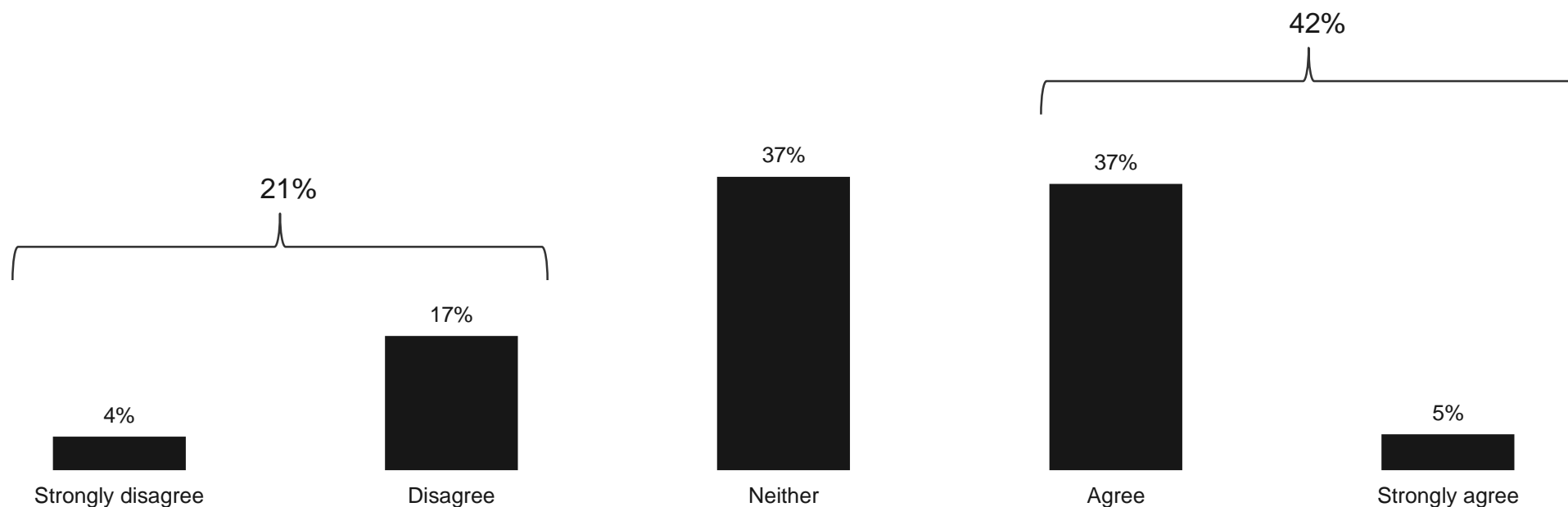
Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown



While a large proportion of New Zealanders agree that the government and industry are taking actions to address the pressures of tourism growth, about 20% do not believe that

Agreement that action is being taken to address the pressures of tourism growth
% 18+ year olds, Nov-18

NEW QUESTION



Base: New Zealanders aged 18 plus: Nov-18 n = 1,084

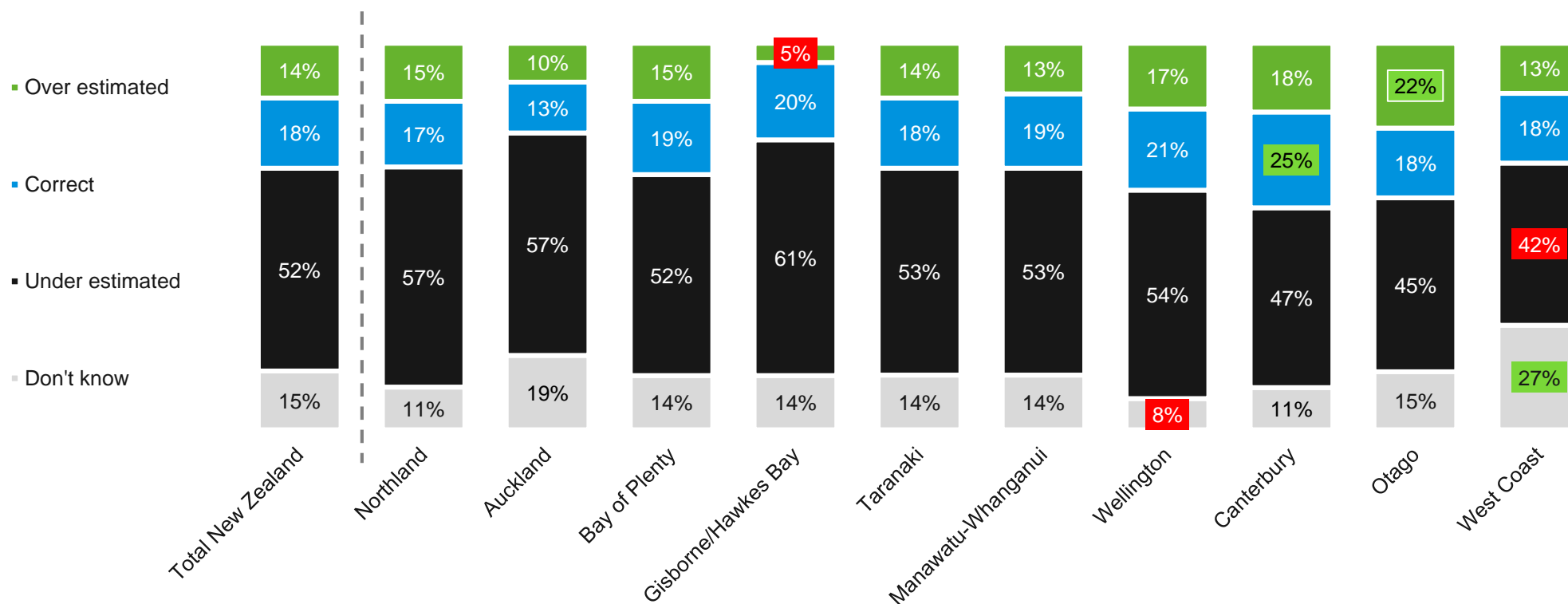
4

Appendix: measures by region

Otago residents are more likely to overestimate annual visitor numbers

Knowledge of annual visitor numbers – by region

%, Nov-18



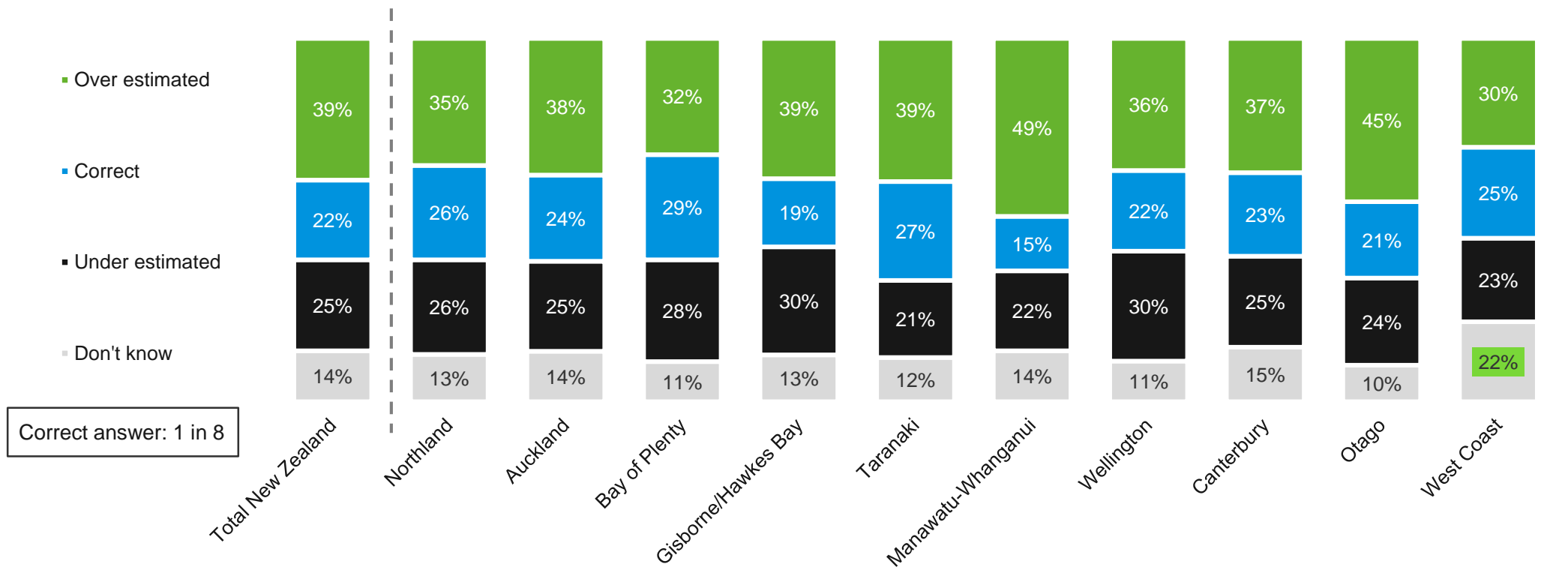
Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%

Knowledge of the number of New Zealand workers employed in the tourism industry is relatively similar across the New Zealand regions

Knowledge of New Zealand workers employed in the tourism industry – by region

%, Nov-18



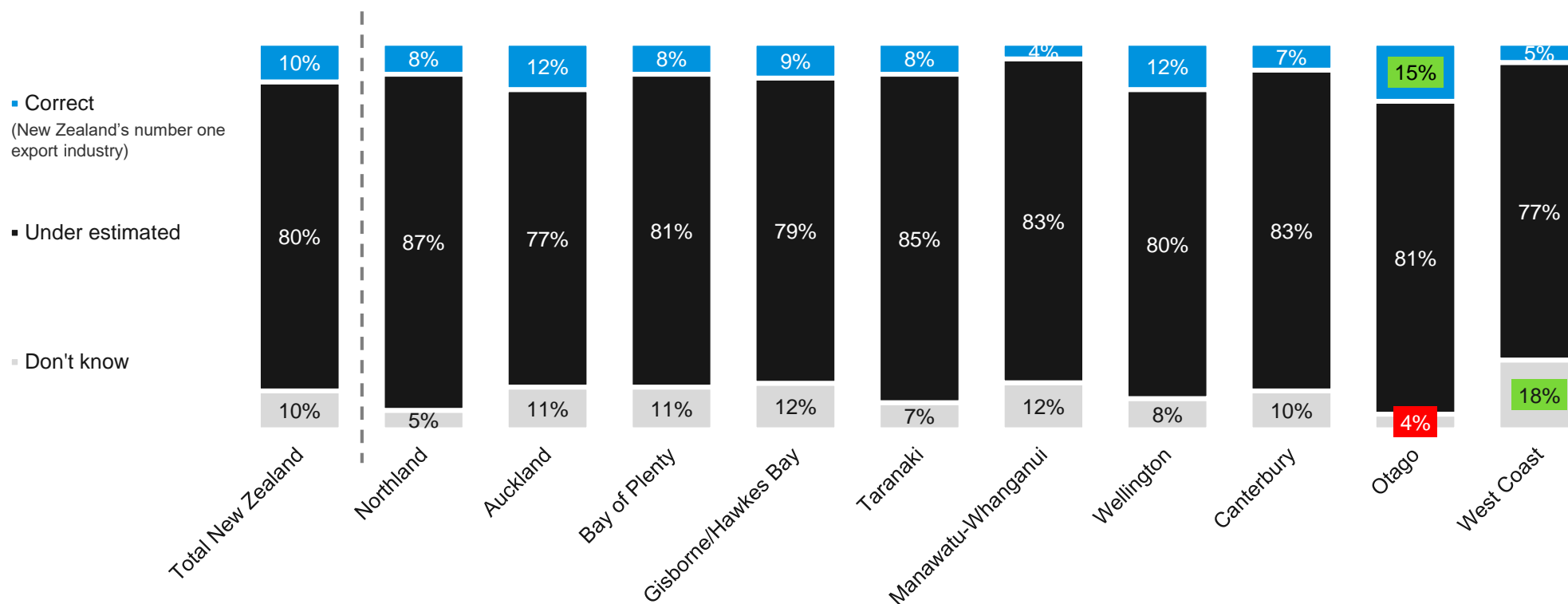
Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%

Knowledge of the value of the tourism industry shows no major differences between the regions

Knowledge of the value of the tourism industry – by region

%, Nov-18



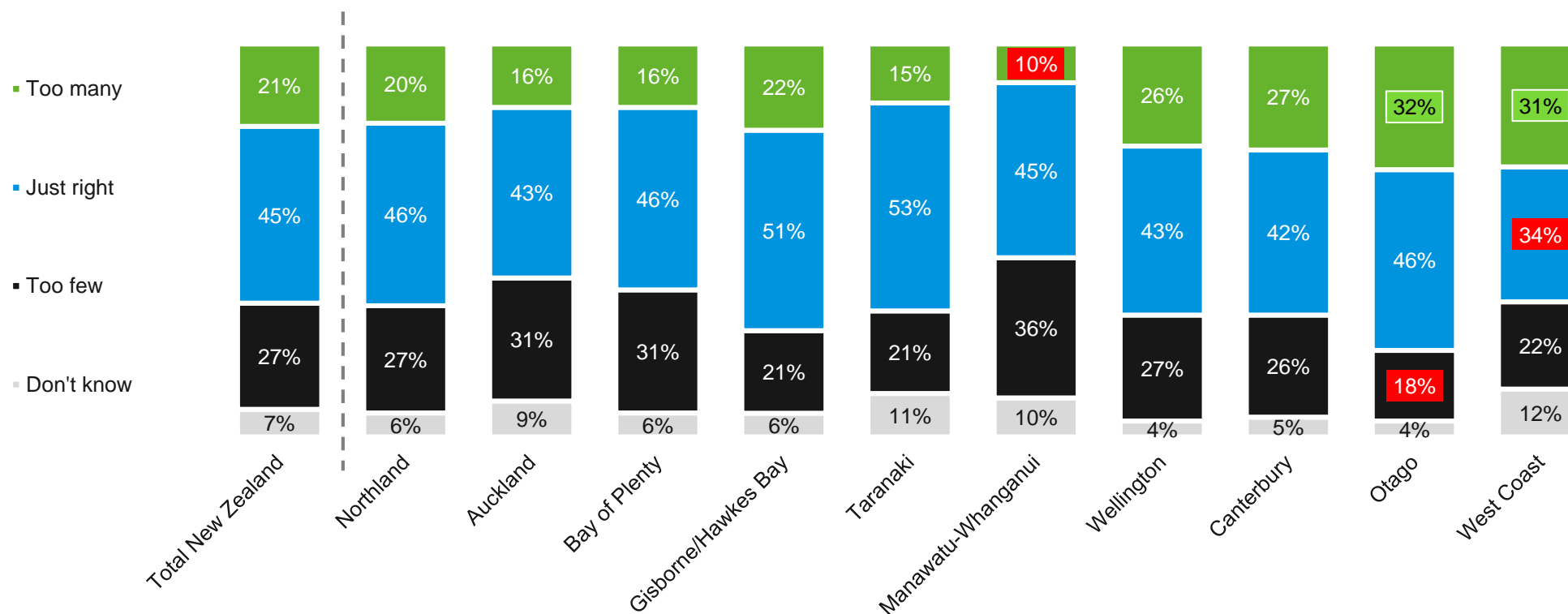
Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%

Otago and West Coast residents are more likely to perceive there to be too many tourists annually

Perception of current number of international visitors (based on actual number) – by region

%, Nov-18



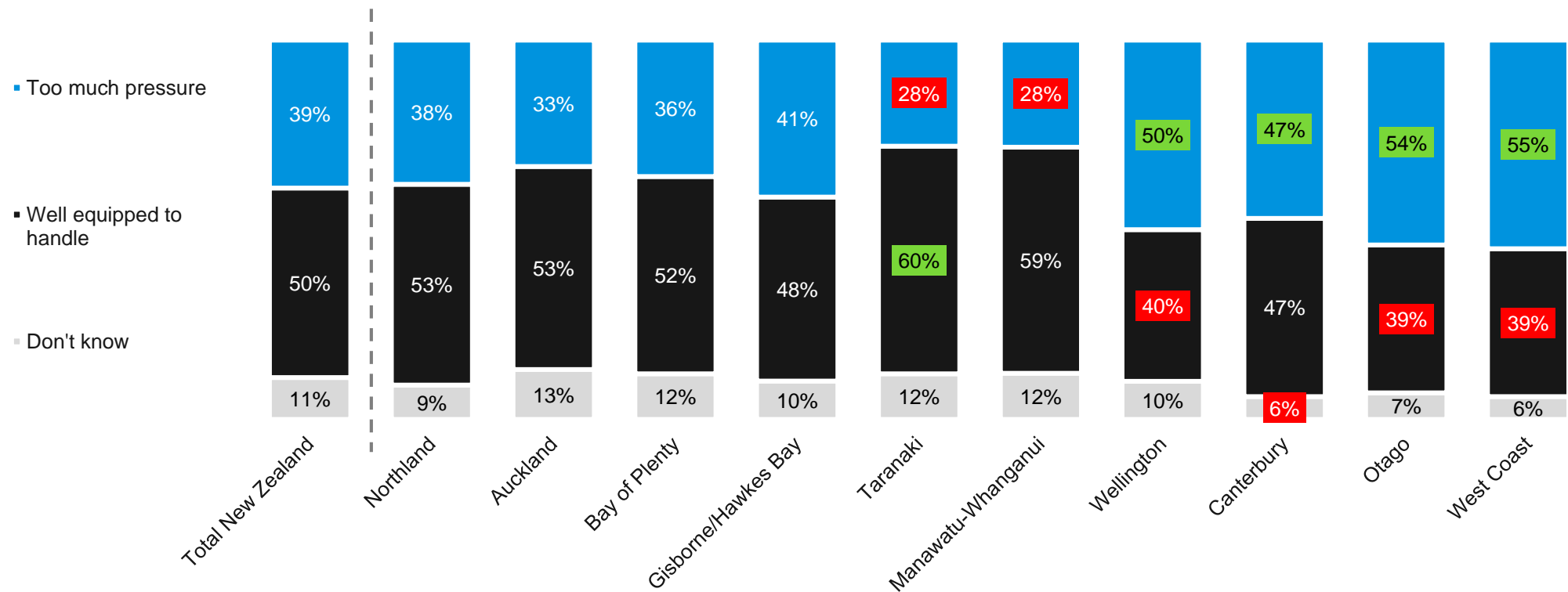
Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%

Residents of Wellington, Canterbury, Otago and West Coast are more likely to think that there is too much pressure from international visitors

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

%, Nov-18



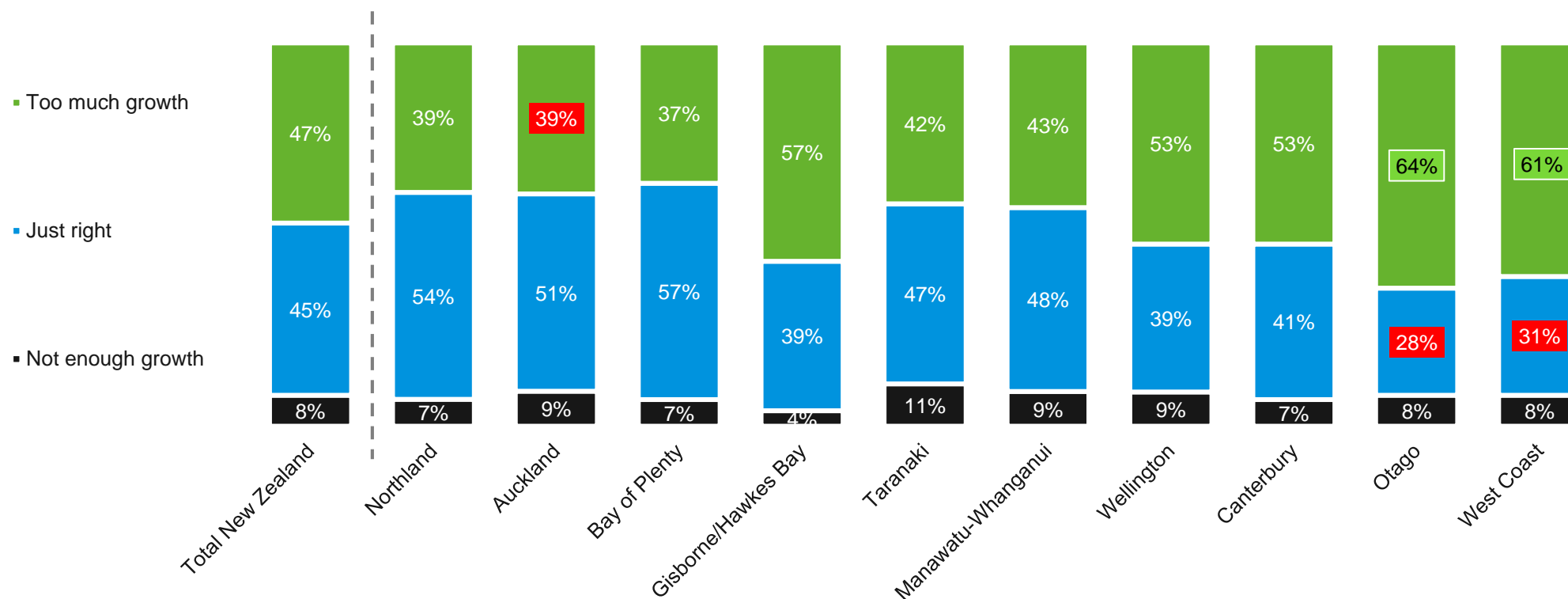
Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%

Otago and West Coast residents are more likely to think that the predicted growth is too much

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

%, Nov-18



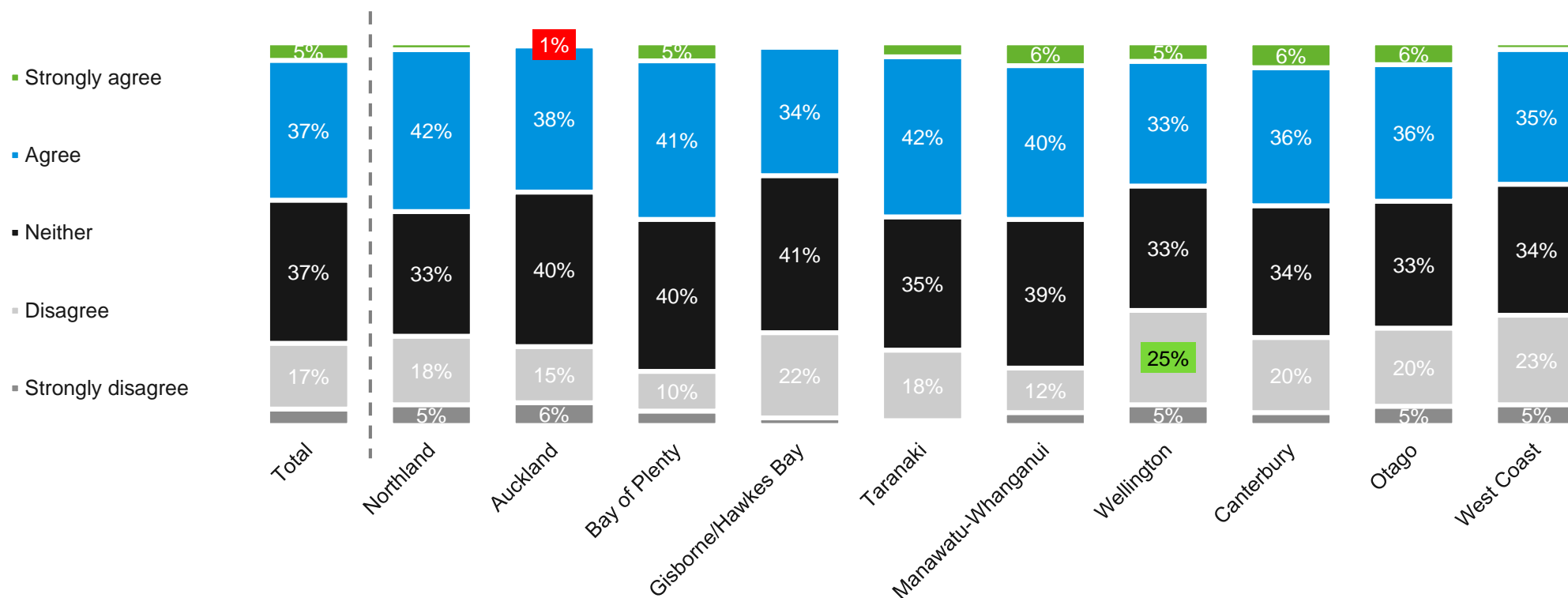
Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%

The level of agreement that action is being taken to address the pressures of tourism growth is largely consistent across the regions

Agreement that action is being taken to address the pressures of tourism growth
% 18+ year olds, Nov-18

NEW QUESTION



Base: Total NZ n = 1,084, Northland n = 100, Auckland n = 99, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 100, Taranaki n = 100, Manawatu-Whanganui n = 81, Wellington n = 101, Canterbury n = 150, Otago n = 153, West Coast n = 100

Significantly higher / lower than all other New Zealand regions at 95%