Mood of the Nation
New Zealanders' perceptions of international tourism
December 2017
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</table>
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, freedom camping, and other pressures.

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

Area sample sizes
This wave (Nov-17) we achieved a total sample of 501. We set minimum quotas to ensure sufficient representation from traditional tourism hotspots, and what we achieved each wave in those areas is below:

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Auckland city</td>
<td>83</td>
<td>100</td>
<td>81</td>
<td>87</td>
<td>80</td>
</tr>
<tr>
<td>Wellington city</td>
<td>61</td>
<td>80</td>
<td>81</td>
<td>80</td>
<td>80</td>
</tr>
<tr>
<td>Rotorua</td>
<td>40</td>
<td>50</td>
<td>48</td>
<td>51</td>
<td>50</td>
</tr>
<tr>
<td>Christchurch</td>
<td>75</td>
<td>80</td>
<td>80</td>
<td>85</td>
<td>81</td>
</tr>
<tr>
<td>Queenstown</td>
<td>17</td>
<td>51</td>
<td>54</td>
<td>50</td>
<td>50</td>
</tr>
</tbody>
</table>

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
Wave 4: 500 online interviews were conducted over the period March 13, 2017 to March 22, 2017
Wave 5: 501 online interviews were conducted over the period November 13, 2017 to November 23, 2017

Weighting and analysis
Respondents were weighted by gender, age and region to be broadly representative of the New Zealand population based on 2017 population estimates
2
Key insights
KEY INSIGHTS (page 1 of 3)

- While the prevailing view is that New Zealand attracts just the right number of international visitors, the proportion of people who believe that New Zealand attracts too many visitors continues to trend upwards (they are however still in the minority)

- Nine in ten New Zealanders agree that international tourism is good for the country

- Most people feel they are proud that New Zealand is an attractive destination and are open to welcoming international visitors
KEY INSIGHTS (page 2 of 3)

- Increasingly more New Zealanders think that international visitors put too much pressure on New Zealand

- A lack of infrastructure to support the growing number of international visitors drives these perceptions

- Queenstown and Auckland are consistently seen as the areas under the most pressure

- What people experience first-hand in their daily lives, what they see / hear from national media, and the first-hand experiences of people they know have the most influence on what New Zealanders think about the impacts of tourism on the country

PERCEPTIONS THAT TOURISTS PUT TOO MUCH PRESSURE ON NEW ZEALAND

<table>
<thead>
<tr>
<th></th>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Environmental damage</td>
<td></td>
<td></td>
<td>40%</td>
<td>35%</td>
</tr>
<tr>
<td>Increased traffic congestion</td>
<td></td>
<td></td>
<td>34% ▲</td>
<td>25% ▲</td>
</tr>
<tr>
<td>Accommodation shortage</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overcrowding</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Freedom camping</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Top 6 ways tourism applies pressure

- Significantly higher / lower than previous wave at 95% CL

<table>
<thead>
<tr>
<th>Date</th>
<th>Impact</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>November 2017</td>
<td>40%</td>
<td></td>
</tr>
<tr>
<td>March 2017</td>
<td>35%</td>
<td>34% ▲</td>
</tr>
<tr>
<td>November 2016</td>
<td>34%</td>
<td>25% ▲</td>
</tr>
<tr>
<td>March 2016</td>
<td></td>
<td></td>
</tr>
<tr>
<td>December 2015</td>
<td>18%</td>
<td></td>
</tr>
</tbody>
</table>
The proportion of New Zealanders that believe the predicted international visitor growth is too much has significantly increased.
3

Detailed insights
There is an unanimous agreement among New Zealanders that international tourism is good for the country, though this has softened a little

International tourism is good for New Zealand
% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th></th>
<th>Mar-17</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Strongly agree</td>
<td>51%</td>
<td></td>
</tr>
<tr>
<td>Agree</td>
<td>45%</td>
<td></td>
</tr>
<tr>
<td>Top 2 box</td>
<td>96%</td>
<td></td>
</tr>
</tbody>
</table>

Base: New Zealanders aged 18 plus Nov-17 n = 501
New Zealanders are generally welcoming of and proud to host international tourists in New Zealand and want them to have an enjoyable experience, however, far less strongly agree that other New Zealanders feel the same way.

Attitudes towards international visitors
% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th>Personal perceptions</th>
<th>Perceptions of how other New Zealanders feel</th>
</tr>
</thead>
<tbody>
<tr>
<td>I want international visitors to have an enjoyable New Zealand experience</td>
<td>Kiwis want international visitors to have an enjoyable experience here</td>
</tr>
<tr>
<td>74%</td>
<td>56%</td>
</tr>
<tr>
<td>16%</td>
<td>32%</td>
</tr>
<tr>
<td>90%</td>
<td>89%</td>
</tr>
<tr>
<td>I am proud that New Zealand is an attractive tourist destination</td>
<td>Kiwis are proud that New Zealand is an attractive tourist destination</td>
</tr>
<tr>
<td>68%</td>
<td>58%</td>
</tr>
<tr>
<td>20%</td>
<td>29%</td>
</tr>
<tr>
<td>89%</td>
<td>88%</td>
</tr>
<tr>
<td>I am open to international tourists coming to New Zealand</td>
<td>Kiwis are open to international tourists coming to New Zealand</td>
</tr>
<tr>
<td>65%</td>
<td>30%</td>
</tr>
<tr>
<td>23%</td>
<td>53%</td>
</tr>
<tr>
<td>88%</td>
<td>83%</td>
</tr>
<tr>
<td>I take pride in making international visitors feel welcome in New Zealand</td>
<td>Kiwis take pride in making international visitors feel welcome here</td>
</tr>
<tr>
<td>58%</td>
<td>32%</td>
</tr>
<tr>
<td>29%</td>
<td>48%</td>
</tr>
<tr>
<td>87%</td>
<td>80%</td>
</tr>
</tbody>
</table>

Base: New Zealanders aged 18 plus Nov-17 n = 501

Strongly agree  Somewhat agree
Personal experience and information in the national media outlets have the most influence on views New Zealanders have about international tourism

<table>
<thead>
<tr>
<th>What influences the opinions on international tourism</th>
<th>Level of influence</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. What I experience first-hand in my daily life</td>
<td>1st most significant: 40%</td>
</tr>
<tr>
<td>2. What I see / hear about tourism from national media outlets</td>
<td>1st most significant: 36%</td>
</tr>
<tr>
<td>3. What I hear from friends / family / colleagues that they experience first hand in their daily lives</td>
<td>1st most significant: 14%</td>
</tr>
<tr>
<td>4. What I see / hear about tourism from regional media outlets</td>
<td>1st most significant: 5%</td>
</tr>
<tr>
<td>5. What I see / hear about tourism from local media outlets</td>
<td>1st most significant: 4%</td>
</tr>
</tbody>
</table>

This question has not been previously asked

Base: New Zealanders aged 18 plus Nov-17 n = 501
Only a small proportion of New Zealanders know exactly how many international visitors New Zealand attracts annually, as most underestimate the number.

Knowledge of annual visitor numbers
% 18+ year olds

- Over estimated
  - Dec-15: 10%
  - Mar-16: 15%
  - Nov-16: 13%
  - Mar-17: 13%
  - Nov-17: 14%

- Correct
  - Dec-15: 16%
  - Mar-16: 19%
  - Nov-16: 20%
  - Mar-17: 20%
  - Nov-17: 19%

- Under estimated
  - Dec-15: 60%
  - Mar-16: 50%
  - Nov-16: 62%
  - Mar-17: 55%
  - Nov-17: 49%

- Don't know
  - Dec-15: 15%
  - Mar-16: 16%
  - Nov-16: 5%
  - Mar-17: 12%
  - Nov-17: 18%

Correct answer
- Dec-15: 3m
- Mar-16: 3m
- Nov-16: 3.5m (actual 3.4m)
- Mar-17: 3.5m
- Nov-17: 3.5m (actual 3.7m)

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

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
A quarter of New Zealanders underestimate the number of people directly or indirectly employed in the tourism industry and more are unsure of this figure than previously.

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

- Over estimated
- Correct
- Under estimated
- Don't know

Correct answer 1 in 8

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
70% of New Zealanders know that tourism is one of the top three revenue earners for the country, however, only 12% know that it is number one.

Knowledge of the value of the tourism industry
% 18+ year olds, Nov-17

- **It’s number one**
  - 12% in Nov-17

- **Compared to previous waves**
  - **Mar-17**
    - It’s number one: 12%
    - It’s in the top three industries: 58%
    - It’s not top three but it is in the top five industries: 16%
    - It’s not top five but it is in the top ten industries: 4%
    - Don’t know: 10%
  - **Nov-16**
    - It’s number one: 10% (↓)
    - It’s in the top three industries: 63%
    - It’s not top three but it is in the top five industries: 17%
    - It’s not top five but it is in the top ten industries: 3%
    - Don’t know: 8% (↑)

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.

Base: New Zealanders aged 18 plus Nov-16 n = 501; Mar-17 n = 501; Nov-17 n = 501

Significantly higher / lower than previous wave at 95% CL
The common view is that New Zealand attracts just the right number of international visitors, with only just a quarter of them believing New Zealand attracts too many visitors.

Perceptions of whether New Zealand attracts too few/too many international visitors
%
18+ year olds, Nov-17

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

- Don't know: 5%
- Too few: 27%
- Just right: 46%
- Too many: 23%

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

- Don't know: 6%
- Too few: 23%
- Just right: 47%
- Too many: 23%

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

Base: New Zealanders aged 18 plus Nov-17 n = 501
While still in the minority, the proportion of New Zealanders who think that New Zealand attracts too many international visitors continues to increase.

Perceptions of whether New Zealand attracts too few/too many international visitors

%, 18+ year olds

Based on **perceived** number of current visitors

<table>
<thead>
<tr>
<th></th>
<th>Too many</th>
<th>Just right</th>
<th>Too few</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec-15</td>
<td>11%</td>
<td>50%</td>
<td>33%</td>
<td>6%</td>
</tr>
<tr>
<td>Mar-16</td>
<td>14%</td>
<td>44%</td>
<td>37%</td>
<td>5%</td>
</tr>
<tr>
<td>Nov-16</td>
<td>16%</td>
<td>49%</td>
<td>33%</td>
<td>3%</td>
</tr>
<tr>
<td>Mar-17</td>
<td>20%</td>
<td>51%</td>
<td>25%</td>
<td>4%</td>
</tr>
<tr>
<td>Nov-17</td>
<td>23%</td>
<td>46%</td>
<td>27%</td>
<td>5%</td>
</tr>
</tbody>
</table>

Based on **actual** number of current visitors

<table>
<thead>
<tr>
<th></th>
<th>Too many</th>
<th>Just right</th>
<th>Too few</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dec-15</td>
<td>13%</td>
<td>51%</td>
<td>28%</td>
<td>9%</td>
</tr>
<tr>
<td>Mar-16</td>
<td>18%</td>
<td>46%</td>
<td>30%</td>
<td>6%</td>
</tr>
<tr>
<td>Nov-16</td>
<td>19%</td>
<td>51%</td>
<td>27%</td>
<td>3%</td>
</tr>
<tr>
<td>Mar-17</td>
<td>21%</td>
<td>50%</td>
<td>25%</td>
<td>5%</td>
</tr>
<tr>
<td>Nov-17</td>
<td>23%</td>
<td>47%</td>
<td>23%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

Significantly higher / lower than previous wave at 95% CL
A lack of adequate infrastructure, overcrowding and increasing cost for locals are some of the top reasons why some New Zealanders feel there are too many international visitors.

Themed verbatim reasons for there being **too many** international visitors (23%)

<table>
<thead>
<tr>
<th>Lack of infrastructure</th>
<th>Overcrowding</th>
<th>Impact on domestic market</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Our infrastructure was not prepared well, and the environment is being harmed”</td>
<td>“Because our hotspots e.g. Queenstown, Auckland etc are very crowded with tourists”</td>
<td>“You don’t really see it with a naked eye, but some things are difficult for locals - for example booking into some of the DOC huts. It also spikes the prices for certain activities”</td>
</tr>
<tr>
<td>“Our infrastructure is insufficiently developed to support large numbers of visitors”</td>
<td>“Overcrowding in tourist destinations”</td>
<td>“Tourist attractions becoming too crowded, dangers on the road, accommodation in places like Queenstown expensive for average kiwi now”</td>
</tr>
<tr>
<td>“We don’t have the infrastructure to absorb the number of tourists, especially in national parks”</td>
<td>“Because when I go to enjoy some of New Zealand’s nice spots there are always tourists there!”</td>
<td>“It seems that everyone wants to shake as much money as they can out of tourists pockets, and at times that happens at the expense of locals, nature, animals etc”</td>
</tr>
<tr>
<td>“We need the visitors for the economy but our smaller towns do not have the infrastructure so if we overcrowd the experience may end up negative which won’t assist us on the international stage”</td>
<td>“Tourism is great. However sometimes it seems as though it can often cause a bit of over population at attractions, and can push locals out, who are trying to explore NZ for themselves”</td>
<td>“Drags the price up on tourist areas. It’s getting expensive for local people to visit them”</td>
</tr>
<tr>
<td>“At present we are not equipped with roading, facilities”</td>
<td>&quot;some areas are particularly congested in relation to tourism, which makes it difficult for national tourists”</td>
<td>“Personal observations in Northland and the fact we as locals have to pay tourist prices for many things”</td>
</tr>
<tr>
<td>“Infrastructure, e.g. accommodation is hard to cope”</td>
<td>“Some places can be swamped with tourists at times”</td>
<td></td>
</tr>
<tr>
<td>“Because I do not think there is enough accommodation at the moment”</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Base: n = 100

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The economic benefits to New Zealand, managed expansion and the desire to showcase our country 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 (23%)

<table>
<thead>
<tr>
<th>Economic benefits</th>
<th>Managed expansion</th>
<th>Showcase New Zealand</th>
</tr>
</thead>
<tbody>
<tr>
<td>“Tourist bring money into the country to spend which creates jobs”</td>
<td>“I think that, with provision of facilities where they may be lacking, NZ could earn much more from the tourist industry as we certainly have the natural attractions, and this field doesn’t have the same amount of competition as some of our export efforts”</td>
<td>“I want people to see our beautiful country”</td>
</tr>
<tr>
<td>“Tourists are great for NZ. They spend a lot of money, create jobs, no crime and make us a diverse community”</td>
<td>“We have the capacity to expand to meet more tourist demand - just not too quickly”</td>
<td>“Because NZ is a great place and I think the world needs to know this. Our scenery is some of the best in the world”</td>
</tr>
<tr>
<td>“There should be more to help the economy”</td>
<td>“I’m sure we could handle more - in certain places”</td>
<td>“We are an underpopulated country and the experience is unique”</td>
</tr>
<tr>
<td>“More tourists means more money coming into the country, as long as we have the hotel rooms and facilities to handle more... Lets keep them coming”</td>
<td>“I think we could do a little bit better in off-peak times and also smaller towns etc”</td>
<td>“NZ is a great country for travel”</td>
</tr>
<tr>
<td>“We need more travellers to visit NZ so it boosts the economy”</td>
<td>“I think there is room for more visitors - especially in Central Otago, not just Queenstown”</td>
<td>“Like as many people as possible to visit and experience NZ”</td>
</tr>
<tr>
<td>“Due to the large impact it has on the economy it is beneficial to the nation if we encourage more tourists to visit our shores”</td>
<td>“So much potential as long as it is managed correctly”</td>
<td>Base: ( n = 139 )</td>
</tr>
<tr>
<td>“I think we could do with more tourism, to boost employment and add money to the economy”</td>
<td>“I’m an accommodation business owner, the more tourists, the better. But I am conscious of the pressure on infrastructure that some types of tourism causes”</td>
<td></td>
</tr>
</tbody>
</table>
Perceptions that international tourists put too much pressure on New Zealand continue to trend upwards

Perceptions that tourists put too much pressure on New Zealand
%
18+ year olds, Nov-17

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
Pressure on infrastructure is the top concern New Zealanders have with international tourism, while concerns around environmental damage and traffic congestion have significantly declined.

Perceptions of how tourism puts pressure on New Zealand

% of those who say “too much pressure”, Nov-17

- Pressure on infrastructure: 36% (Mar-17: 44%)
- Accommodation shortage: 22% (Mar-17: 29%)
- Environmental damage: 21% (Mar-17: 31%)
- Increased traffic congestion: 20% (Mar-17: 29%)
- Freedom camping: 10% (Mar-17: 13%)
- Overcrowding of scenic spots/landmarks: 9% (Mar-17: 10%)

Base: Those who say “too much pressure” Nov-17 n = 190
Notes: Agreement on a 7 point scale where 1 is ‘strongly disagree’ and 7 is ‘strongly agree’; Top two box is shown
A third of New Zealanders believe that some places are under more pressure than others, and this is increasing over time; Queenstown and Auckland are the main places perceived to be under more pressure.

### “Some places are under more pressure”

% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th>Month</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nov-17</td>
<td>35%</td>
</tr>
<tr>
<td>Mar-17</td>
<td>33%</td>
</tr>
<tr>
<td>Nov-16</td>
<td>30%</td>
</tr>
<tr>
<td>Mar-16</td>
<td>21%</td>
</tr>
<tr>
<td>Dec-15</td>
<td>13%</td>
</tr>
</tbody>
</table>

### Which places?

% Nov-17, those who say some places are under more pressure

<table>
<thead>
<tr>
<th>Place</th>
<th>Mar-17</th>
<th>Nov-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Queenstown</td>
<td>54%</td>
<td>54%</td>
</tr>
<tr>
<td>Auckland</td>
<td>48%</td>
<td>43%</td>
</tr>
<tr>
<td>Rotorua</td>
<td>19%</td>
<td>30%</td>
</tr>
<tr>
<td>Tauranga / Taupo / BoP</td>
<td>13%</td>
<td>10%</td>
</tr>
<tr>
<td>Wellington</td>
<td>10%</td>
<td>7%</td>
</tr>
<tr>
<td>Christchurch</td>
<td>10%</td>
<td>11%</td>
</tr>
<tr>
<td>National Parks / Great Walks</td>
<td>9%</td>
<td>20%</td>
</tr>
<tr>
<td>Northland / Bay of Islands</td>
<td>7%</td>
<td>5%</td>
</tr>
</tbody>
</table>

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

Significantly higher / lower than previous wave at 95% CL
The proportion of New Zealanders that feel the predicted future growth of international visitors is too high has significantly increased since March 2017.

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

- Too much growth
  - Dec-15: 30%
  - Mar-16: 30%
  - Nov-16: 35%
  - Mar-17: 37%
  - Nov-17: 44%

- Just right
  - Dec-15: 57%
  - Mar-16: 58%
  - Nov-16: 51%
  - Mar-17: 54%
  - Nov-17: 46%

- Not enough growth
  - Dec-15: 13%
  - Mar-16: 12%
  - Nov-16: 14%
  - Mar-17: 9%
  - Nov-17: 10%

Predicted growth
- 4m in 4-5 yrs
- 4m in 4-5 yrs
- 4m in 2-3 yrs
- 4m in 2-3 yrs
- 4.5m in 4-5 yrs

Base: Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501

Significantly higher / lower than previous wave at 95% CL
A lack of adequate infrastructure, overcrowding and environmental damage all feature as key reasons why New Zealanders feel there is too much predicted growth.

Themed verbatim reasons for there being too much predicted growth (44%)

### Lack of infrastructure
- “Infrastructure isn't ready to handle those numbers”
- “From what I have learnt from the media our infrastructure in regards to DOC, they are increasingly stretched. Without significant funding, this issue will only be further exacerbated”
- “I feel concerned that our infrastructure is unable to keep up with that volume of growth”
- “Infrastructure needs to be upgraded to cope with this level of visitors. Roads are in such a poor state that more on those roads is going to lead to more accidents”
- “Because at this stage we don't have infrastructure in place to cope with 4.5 million tourists (esp. in more regional areas)”
- “Queenstown and Wanaka already have too many visitors for infrastructure like parking, roads and amenities to handle”
- “We have 1/100 kiwis homeless so perhaps accommodations should be sorted for them before we invite more tourists over which will burden accommodation issues even more”

### Overcrowding
- “I don’t want NZ to get too crowded”
- “If there are too many cars and vehicles the experience of wide open spaces, few people and nature will be diluted”
- “Overcrowding and putting pressure on our clean green image”
- “I think we’re at a good number now, too many more and the cons will start to outweigh the pros”
- “Too many people for our small country to cope with”
- “Visitor experience is lessened when over crowded. Tourism will have a negative impact from over crowding”
- “We don’t want to ruin the experience by overcrowding”
- “I think 4 million would be a max ideal amount. We wouldn't want tourists being put off because there's too many tourists. You'd need to spread out their travel times not to jam the peak season but that's when locals usually engage so they might miss out more”

### Environmental damage
- “Again, too many visitors can have a negative impact on the environment and landscape (but can be good for the economy)”
- “Too many international visitors may cause damage to the natural landscapes that we have. Maintaining exclusivity would keep NZ feeling premium”
- “Don't want our natural beauty to be degraded or destroyed by too many tourists.”
- “Too much pollution”
- “The investment in infrastructure is not following this increase in tourist numbers and that will be detrimental to our environment, and to the visitors experience”
- “More people equals more pollution, more environmental damage”
- “I doubt if we’d be able to absorb those numbers without damage to our natural environment”
- “Keep NZ beautiful and make sure we stay clean and pure, i.e. don’t copy other countries!”

Base: n = 211

© Kantar TNS November 2017
Some New Zealanders want to see increased growth in tourist numbers, but only if there is the infrastructure and resources available; other drivers are the economic growth that comes from increased tourist numbers and a perception of spare capacity.

Themed verbatim reasons for there being **not enough** predicted growth (10%)

### Managed growth
- “I think over the next 4-5 years, we could even host a few more visitors than that - as long as we have the facilities and resources, etc.”
- “The more we get the better, as long as we get the infrastructure in place first”
- “We should be able to accommodate more people but we need to make sure that we increase the facilities including the road safety”
- “With travel getting cheaper we should be doubling our number of visitors providing infrastructure can keep up with demand”
- “Growth needs to be managed so that the impact on our natural resources and infrastructure is negligible”
- “I believe that with the right resourcing and infrastructure, including the development of a variety of different tourist experiences e.g. rail trails, hiking tracks, etc. NZ is well positioned to benefit from increased tourist numbers”

### Economic growth
- “We need more growth & opportunity for everybody”
- “More would be better for the economy”
- “Increase in tourism = more money into NZ”
- “The more people here the more $$ for our economy”
- “We need tourism to grow our economy”
- “The whole economy gains from growth”
- “Because international visitors support our economy and help local businesses grow”
- “If we create a clean green tourism economy then growth can be really large”
- “More tourists, more money, more jobs”

### Spare capacity
- “We have much more spaces for more tourists”
- “I still think we can accommodate more tourists”
- “Smaller countries than ours host many more visitors each year”
- “There is more capacity available outside the main current tourist areas”
- “Plenty of scope to welcome more if dispersed seasonally and regionally”
- “4.5m is only the size of our population. places like Singapore, Bali, London, Gold Coast, Sydney etc have considerably more tourists p.a. than their population. Hence we should be able to as well”

Base: n = 54
Key perceived benefits of tourism are economic growth for the regions and local business, and employment opportunities for residents; perceptions of tourism having a positive impact on infrastructure development and recreational facilities increase.

Pros of international tourism
% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Nov-16</th>
<th>Mar-17</th>
<th>Change</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates economic growth for the regions</td>
<td>55%</td>
<td>54%</td>
<td>1%</td>
</tr>
<tr>
<td>Creates growth opportunities for businesses</td>
<td>56%</td>
<td>53%</td>
<td>-3%</td>
</tr>
<tr>
<td>Creates employment opportunities for residents</td>
<td>52%</td>
<td>50%</td>
<td>-2%</td>
</tr>
<tr>
<td>Adds to the vitality of regions and local communities</td>
<td>37%</td>
<td>35%</td>
<td>-2%</td>
</tr>
<tr>
<td>Connects local communities to other cultures</td>
<td>27%</td>
<td>33%</td>
<td>6%</td>
</tr>
<tr>
<td>Drives infrastructure development in the regions</td>
<td>27%</td>
<td>25%</td>
<td>-2%</td>
</tr>
<tr>
<td>Drives improvements to recreational facilities in local communities</td>
<td>27%</td>
<td>31%</td>
<td>4%</td>
</tr>
</tbody>
</table>

Base: New Zealanders aged 18 plus Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501
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% CL
There has been a significant increase in perceived adverse impact of tourism on road accidents, natural environment, increased city foot traffic, overcrowding at attractions and staff recruitment

Cons of international tourism
% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th>Impact</th>
<th>Mar-17</th>
<th>Nov-16</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results in increased traffic congestion on holiday routes</td>
<td>39%</td>
<td>41%</td>
</tr>
<tr>
<td>Increases the risk of serious road accidents</td>
<td>33%</td>
<td>40%</td>
</tr>
<tr>
<td>Results in a higher number of road accidents</td>
<td>31%</td>
<td>42%</td>
</tr>
<tr>
<td>Results in increased littering</td>
<td>33%</td>
<td>32%</td>
</tr>
<tr>
<td>Makes accommodation too expensive for New Zealand residents</td>
<td>28%</td>
<td>32%</td>
</tr>
<tr>
<td>Results in damage to New Zealand’s natural environment</td>
<td>23%</td>
<td>30%</td>
</tr>
<tr>
<td>Increases congestion in the walking areas of urban centers</td>
<td>15%</td>
<td>18%</td>
</tr>
<tr>
<td>Makes it hard for New Zealand residents to find accommodation vacancies</td>
<td>22%</td>
<td>24%</td>
</tr>
<tr>
<td>Means attractions are too busy for New Zealand residents to enjoy</td>
<td>15%</td>
<td>19%</td>
</tr>
<tr>
<td>Makes it hard to find enough staff to work in the tourism industry</td>
<td>11%</td>
<td>13%</td>
</tr>
</tbody>
</table>

Base: New Zealanders aged 18 plus Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501
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% CL
People residing in Wellington and Otago have stronger perceptions of economic benefits of tourism, while other North Island regions outside of Wellington and Bay of Plenty have weaker perceptions – this emphasises the importance of regional

**Pros of international tourism by region**

% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th>Benefit</th>
<th>Auckland</th>
<th>Wellington</th>
<th>Bay of Plenty</th>
<th>Other North Island</th>
<th>Canterbury</th>
<th>Otago</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates growth <strong>opportunities for businesses</strong></td>
<td>49%</td>
<td>66%</td>
<td>53%</td>
<td>49%</td>
<td>55%</td>
<td>66%</td>
</tr>
<tr>
<td>Creates <strong>employment opportunities</strong> for residents</td>
<td>49%</td>
<td>63%</td>
<td>59%</td>
<td>45%</td>
<td>54%</td>
<td>55%</td>
</tr>
<tr>
<td>Creates <strong>economic growth</strong> for the regions</td>
<td>49%</td>
<td>67%</td>
<td>63%</td>
<td>46%</td>
<td>61%</td>
<td>69%</td>
</tr>
<tr>
<td>Connects local communities to <strong>other cultures</strong></td>
<td>40%</td>
<td>39%</td>
<td>42%</td>
<td>27%</td>
<td>34%</td>
<td>47%</td>
</tr>
<tr>
<td>Adds to the <strong>vitality of regions</strong> and local communities</td>
<td>33%</td>
<td>49%</td>
<td>41%</td>
<td>38%</td>
<td>45%</td>
<td>46%</td>
</tr>
<tr>
<td>Drives <strong>infrastructure development</strong> in the regions</td>
<td>31%</td>
<td>35%</td>
<td>35%</td>
<td>35%</td>
<td>36%</td>
<td>39%</td>
</tr>
<tr>
<td>Drives improvements to <strong>recreational facilities</strong> in local communities</td>
<td>28%</td>
<td>33%</td>
<td>31%</td>
<td>32%</td>
<td>33%</td>
<td>37%</td>
</tr>
</tbody>
</table>

Heat map shading is across rows

Base: Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65
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 stronger among those residing in Otago and North Island regions outside the major cities or Bay of Plenty

Cons of international tourism by region
% agree, 18+ year olds, Nov-17

<table>
<thead>
<tr>
<th>Issue</th>
<th>Auckland</th>
<th>Wellington</th>
<th>Bay of Plenty</th>
<th>Other North Island</th>
<th>Canterbury</th>
<th>Otago</th>
</tr>
</thead>
<tbody>
<tr>
<td>Results in increased traffic congestion on holiday routes</td>
<td>38%</td>
<td>38%</td>
<td>33%</td>
<td>50%</td>
<td>36%</td>
<td>49%</td>
</tr>
<tr>
<td>Increases the risk of serious road accidents</td>
<td>30%</td>
<td>46%</td>
<td>33%</td>
<td>47%</td>
<td>50%</td>
<td>55%</td>
</tr>
<tr>
<td>Makes accommodation too expensive for New Zealand residents</td>
<td>30%</td>
<td>23%</td>
<td>25%</td>
<td>36%</td>
<td>35%</td>
<td>38%</td>
</tr>
<tr>
<td>Results in increased littering</td>
<td>26%</td>
<td>33%</td>
<td>29%</td>
<td>38%</td>
<td>35%</td>
<td>41%</td>
</tr>
<tr>
<td>Results in a higher number of road accidents</td>
<td>23%</td>
<td>42%</td>
<td>38%</td>
<td>46%</td>
<td>50%</td>
<td>52%</td>
</tr>
<tr>
<td>Increases congestion in the walking areas of urban centres</td>
<td>23%</td>
<td>17%</td>
<td>13%</td>
<td>34%</td>
<td>20%</td>
<td>28%</td>
</tr>
<tr>
<td>Results in damage to New Zealand's natural environment</td>
<td>22%</td>
<td>28%</td>
<td>25%</td>
<td>41%</td>
<td>27%</td>
<td>32%</td>
</tr>
<tr>
<td>Makes it hard to find enough staff to work in the tourism industry</td>
<td>22%</td>
<td>7%</td>
<td>15%</td>
<td>15%</td>
<td>17%</td>
<td>33%</td>
</tr>
<tr>
<td>Makes it hard for New Zealand residents to find accommodation vacancies</td>
<td>19%</td>
<td>16%</td>
<td>13%</td>
<td>32%</td>
<td>22%</td>
<td>34%</td>
</tr>
<tr>
<td>Means attractions are too busy for New Zealand residents to enjoy</td>
<td>17%</td>
<td>11%</td>
<td>17%</td>
<td>30%</td>
<td>23%</td>
<td>22%</td>
</tr>
</tbody>
</table>

Heat map shading is across rows

Base: Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65
Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown
While those who are particularly negative about tourism are likely to be more concerned about the environmental impact, most New Zealanders are concerned about the effect tourism has on road safety.

**Cons of international tourism by attitude towards tourism numbers**

<table>
<thead>
<tr>
<th>Rank</th>
<th>Cons</th>
<th>Most negative</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Results in increased traffic congestion on holiday routes</td>
<td>1</td>
</tr>
<tr>
<td>2</td>
<td>Increases the risk of serious road accidents</td>
<td>2</td>
</tr>
<tr>
<td>3</td>
<td>Results in a higher number of road accidents</td>
<td>3</td>
</tr>
<tr>
<td>1</td>
<td>Results in damage to New Zealand’s natural environment</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Results in increased traffic congestion on holiday routes</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Increases the risk of serious road accidents</td>
<td></td>
</tr>
</tbody>
</table>

Base: Nov-17 n = 501

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; n = 72
4
Appendix: measures by region
Otago, Bay of Plenty and Canterbury residents were the most likely to correctly estimate annual visitor numbers

Knowledge of annual visitor numbers – by region

% correct Mar-17

Total New Zealand: 20%
Auckland: 20%
Wellington: 18%
Bay of Plenty: 32%
Other North Island: 19%
Canterbury: 18%
Otago: 28%

% correct Nov-16

Total New Zealand: 20%
Auckland: 21%
Wellington: 18%
Bay of Plenty: 29%
Other North Island: 13%
Canterbury: 18%
Otago: 28%

Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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Wellington residents were the most likely to know how many workers are employed in the tourism industry.

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

<table>
<thead>
<tr>
<th>Region</th>
<th>Over estimated</th>
<th>Correct</th>
<th>Under estimated</th>
<th>Don't know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total New Zealand</td>
<td>37%</td>
<td>19%</td>
<td>27%</td>
<td>18%</td>
</tr>
<tr>
<td>Auckland</td>
<td>37%</td>
<td>15%</td>
<td>27%</td>
<td>21%</td>
</tr>
<tr>
<td>Wellington</td>
<td>28%</td>
<td>30%</td>
<td>28%</td>
<td>14%</td>
</tr>
<tr>
<td>Bay of Plenty</td>
<td>28%</td>
<td>23%</td>
<td>38%</td>
<td>11%</td>
</tr>
<tr>
<td>Other North Island</td>
<td>40%</td>
<td>15%</td>
<td>25%</td>
<td>20%</td>
</tr>
<tr>
<td>Canterbury</td>
<td>32%</td>
<td>25%</td>
<td>29%</td>
<td>14%</td>
</tr>
<tr>
<td>Otago</td>
<td>44%</td>
<td>19%</td>
<td>18%</td>
<td>19%</td>
</tr>
</tbody>
</table>

Correct answer: 1 in 8

- % correct Mar-17: Total New Zealand 24%, Auckland 23%, Wellington 28%, Bay of Plenty 28%, Other North Island 25%, Canterbury 26%, Otago 21%
- % correct Nov-16: Total New Zealand 25%, Auckland 23%, Wellington 33%, Bay of Plenty 20%, Other North Island 25%, Canterbury 25%, Otago 29%

Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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North Island regions outside the major cities or Bay of Plenty have significantly improved in the proportion of residents who correctly estimate that tourism is New Zealand’s biggest revenue earner.

Knowledge of the value of the tourism industry – by region
%
Nov-17

<table>
<thead>
<tr>
<th>Region</th>
<th>Correct (New Zealand’s number one export industry)</th>
<th>Under estimated</th>
<th>Don’t know</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total New Zealand</td>
<td>12%</td>
<td>78%</td>
<td>10%</td>
</tr>
<tr>
<td>Auckland</td>
<td>15%</td>
<td>77%</td>
<td>9%</td>
</tr>
<tr>
<td>Wellington</td>
<td>8%</td>
<td>83%</td>
<td>9%</td>
</tr>
<tr>
<td>Bay of Plenty</td>
<td>6%</td>
<td>89%</td>
<td>5%</td>
</tr>
<tr>
<td>Other North Island</td>
<td>14%</td>
<td>74%</td>
<td>13%</td>
</tr>
<tr>
<td>Canterbury</td>
<td>6%</td>
<td>82%</td>
<td>12%</td>
</tr>
<tr>
<td>Otago</td>
<td>24%</td>
<td>68%</td>
<td>8%</td>
</tr>
</tbody>
</table>

% correct Mar-17
Total New Zealand: 10%
Auckland: 13%
Wellington: 10%
Bay of Plenty: 11%
Other North Island: 4%
Canterbury: 7%
Otago: 23%

% correct Nov-16
Total New Zealand: 16%
Auckland: 17%
Wellington: 9%
Bay of Plenty: 28%
Other North Island: 17%
Canterbury: 10%
Otago: 32%

Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65
There is no significant difference between the regions in perceptions of international visitor numbers

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

%, Nov-17

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

Total New Zealand:
- 23% Too many
- 47% Just right
- 23% Too few
- 6% Don't know

Auckland:
- 23% Too many
- 48% Just right
- 21% Too few
- 8% Don't know

Wellington:
- 17% Too many
- 46% Just right
- 31% Too few
- 6% Don't know

Bay of Plenty:
- 14% Too many
- 48% Just right
- 34% Too few
- 4% Don't know

Other North Island:
- 27% Too many
- 49% Just right
- 20% Too few
- 4% Don't know

Canterbury:
- 25% Too many
- 48% Just right
- 21% Too few
- 6% Don't know

Otago:
- 23% Too many
- 44% Just right
- 23% Too few
- 2% Don't know

Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65
Aucklanders are least likely to think that we are well equipped to deal with the pressure from tourism.

Perceptions of the pressure that tourists put on New Zealand – by region
%
Nov-17

- Too much pressure
  - Total New Zealand: 40%
  - Auckland: 41%
  - Wellington: 35%
  - Bay of Plenty: 26%
  - Other North Island: 45%
  - Canterbury: 35%
  - Otago: 46%

- Well equipped to handle
  - Total New Zealand: 51%
  - Auckland: 44%
  - Wellington: 57%
  - Bay of Plenty: 66%
  - Other North Island: 51%
  - Canterbury: 58%
  - Otago: 48%

- Don't know
  - Total New Zealand: 9%
  - Auckland: 15%
  - Wellington: 7%
  - Bay of Plenty: 8%
  - Other North Island: 4%
  - Canterbury: 7%
  - Otago: 6%

Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65
North Island residents outside the major cities or Bay of Plenty are more likely to feel the predicted growth is too much, significantly increasing since March this year.

Attitudes towards predicted future growth of annual international visitors – by region
%
Nov-17

- Too much growth
  - Total New Zealand: 44%
  - Auckland: 37%
  - Wellington: 34%
  - Bay of Plenty: 34%
  - Other North Island: 52%
  - Canterbury: 51%
  - Otago: 44%

- Just right
  - Total New Zealand: 46%
  - Auckland: 53%
  - Wellington: 57%
  - Bay of Plenty: 52%
  - Other North Island: 39%
  - Canterbury: 37%
  - Otago: 45%

- Not enough growth
  - Total New Zealand: 10%
  - Auckland: 10%
  - Wellington: 9%
  - Bay of Plenty: 14%
  - Other North Island: 9%
  - Canterbury: 12%
  - Otago: 11%

Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

Significantly higher / lower than other New Zealand at 95% CL
Significantly higher / lower than Mar-17 at 95% CL