

KANTAR

Report: New Zealanders' Views of Tourism

May 2023



Objective

To understand New Zealanders' views of the impacts of tourism and identify key issues that affect perceptions and tolerance for further tourism growth

Background

- Tourism must enrich New Zealand and the well-being of New Zealanders by creating jobs, restoring nature, enhancing our heritage, building our national reputation and making us proud
- Through a period of strong growth in tourism until early 2020, the impacts or costs of visitation have become clear with issues such as disparate economic contribution across regions, pressure on infrastructure, carbon emissions and congestion among others
- As New Zealand recovers from the pandemic, there is an opportunity to maximise positive benefits to New Zealand not only across economy, but also the environment, society and culture
- This research is a partnership between Tourism New Zealand (TNZ), Tourism Industry Aotearoa (TIA), Department of Conservation (DOC), Regional Tourism New Zealand (RTNZ), and Ministry of Business, Innovation and Employment (MBIE)
- The objective of this research is to provide an understanding of how New Zealanders view international and domestic tourism and identify any areas of concern that might impact tolerance and direction for tourism growth post-Covid 19

Research approach



Method and audience

An online survey of residents in New Zealand aged 18 to 74 yrs. old



Sample sizes

The sample size for this bi-annual study is approx. n = 1430 people per wave, 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 = 80 | Queenstown | n = 150 |
| Auckland region | n = 150 | Wellington region | n = 130 | Elsewhere in Otago | n = 100 |
| Rotorua | n = 100 | Other North Island | n = 130 | West Coast | n = 100 |
| Gisborne / Hawkes Bay | n = 100 | Christchurch | n = 100 | Other South Island | n = 40 |
| Taranaki | n = 100 | Elsewhere in Canterbury | n = 50 | | |



Fieldwork date

Wave 3: 28th April to 18th May, 2023



Weighting

Respondents were weighted by gender, age and region to be representative of the New Zealand population based on 2018 population estimates

KEY OUTTAKES


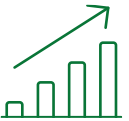



89% of NZers agree that **tourism is good** for New Zealand, with an increase over the last year and a strong appreciation of the contribution of both international and domestic tourism to New Zealand

The majority of NZers continue to understand the **economic benefits** of tourism, but there are two strong concerns that remain: (1) tourism's negative impact on traffic congestion and road accidents; (2) increasing cost of domestic holidays for NZers

The proportion of NZers who express **concern about the impact** that tourism has on New Zealand's **natural environment** has been declining over the 12 months – fewer NZers now see tourism as damaging to New Zealand's natural environment

Fewer NZers now perceive the level of tourism in their community as being excessively high compared to Nov 22 - additionally, there is still a high 37% of NZers who **would like to see more tourism** in their communities

PERFORMANCE SCORECARD MAY 23

| | Overall tourism | International tourism | Domestic tourism |
|---|-----------------|-----------------------|------------------|
|  <p>Good for New Zealand (% Strongly agree or agree)</p> | 89% | 86% | 90% |
|  <p>Important for economy (% Very important or important)</p> | 92% | 92% | 90% |
|  <p>Has positive impact on social wellbeing (% Very positive or positive)</p> | 60% | 53% | 72% |
|  <p>Has positive impact on culture, values & heritage (% Very positive or positive)</p> | 62% | 58% | 68% |
|  <p>Has positive impact on environment (% Mostly positive or somewhat positive)</p> | 35% | 26% | 42% |

Significantly higher /
 lower than Nov 22

1

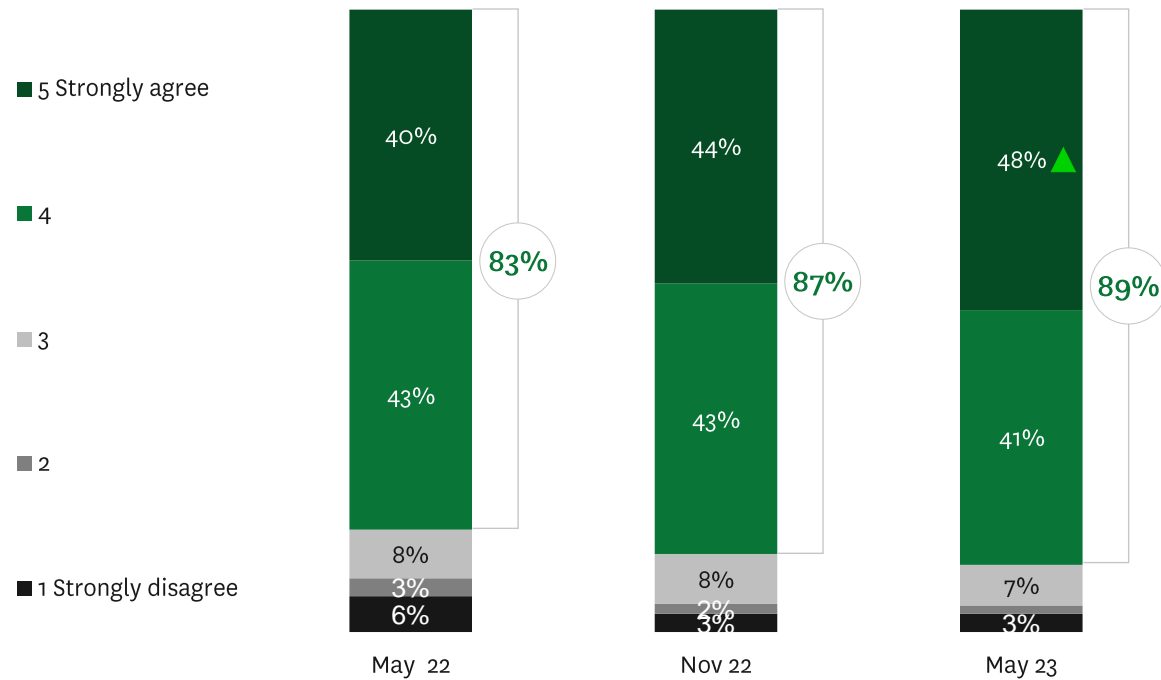
New Zealanders'
overall views on
tourism



Increasingly, NZers agree that tourism is good for New Zealand, now at a very healthy 89%

Agreement with the statement: "Tourism is good for New Zealand"

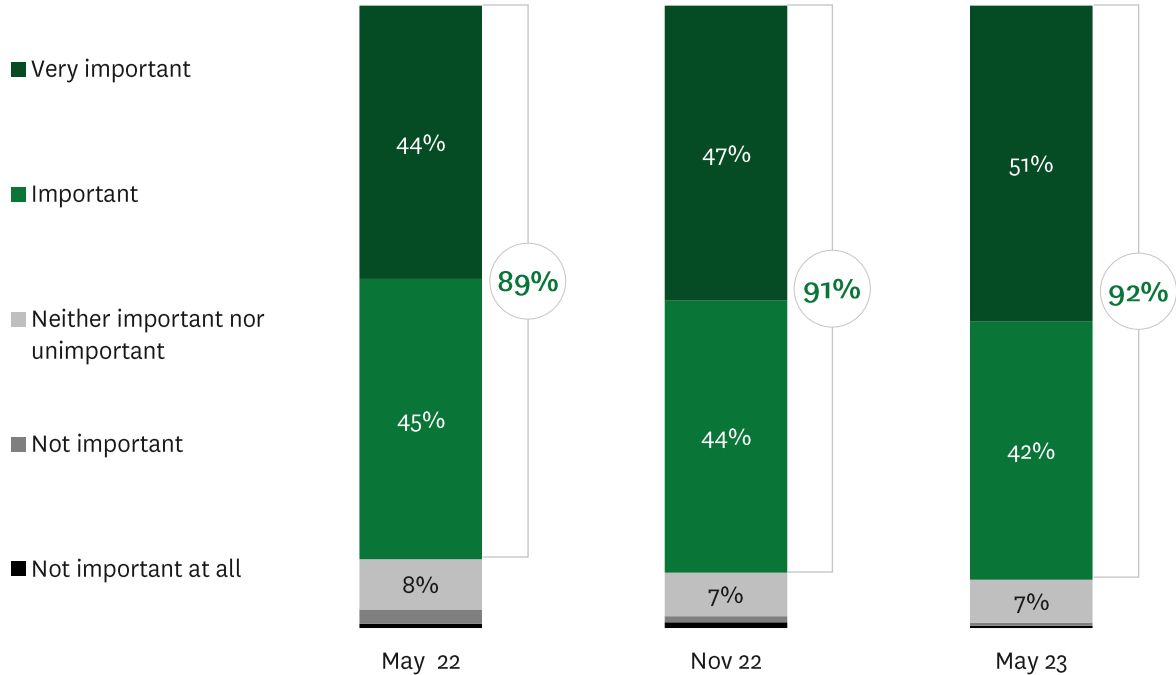
% All NZers, 18+ year olds



The role of tourism in the New Zealand economy is widely appreciated, with a very healthy 92% of NZers agreeing that it is important to New Zealand economy

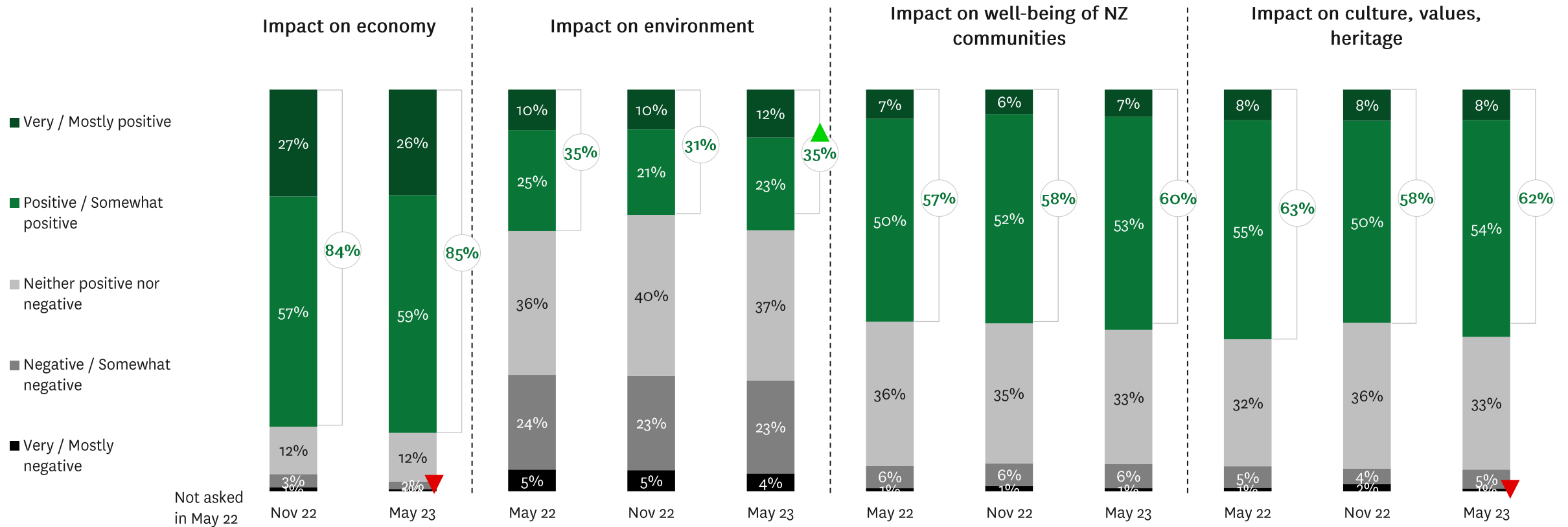
Importance of Tourism for the New Zealand economy

% All NZers, 18+ year olds



Perceptions of the positive impacts of tourism across all four capitals hold, with perceptions of the positive impacts on the environment recovering to levels seen a year ago

Impact of tourism on New Zealand across four capitals: economy, environment, society and culture



Albeit some minor shifts from Nov 22, the majority of NZers continue to understand the wider benefits of tourism

Perceived benefits of tourism (May 23)

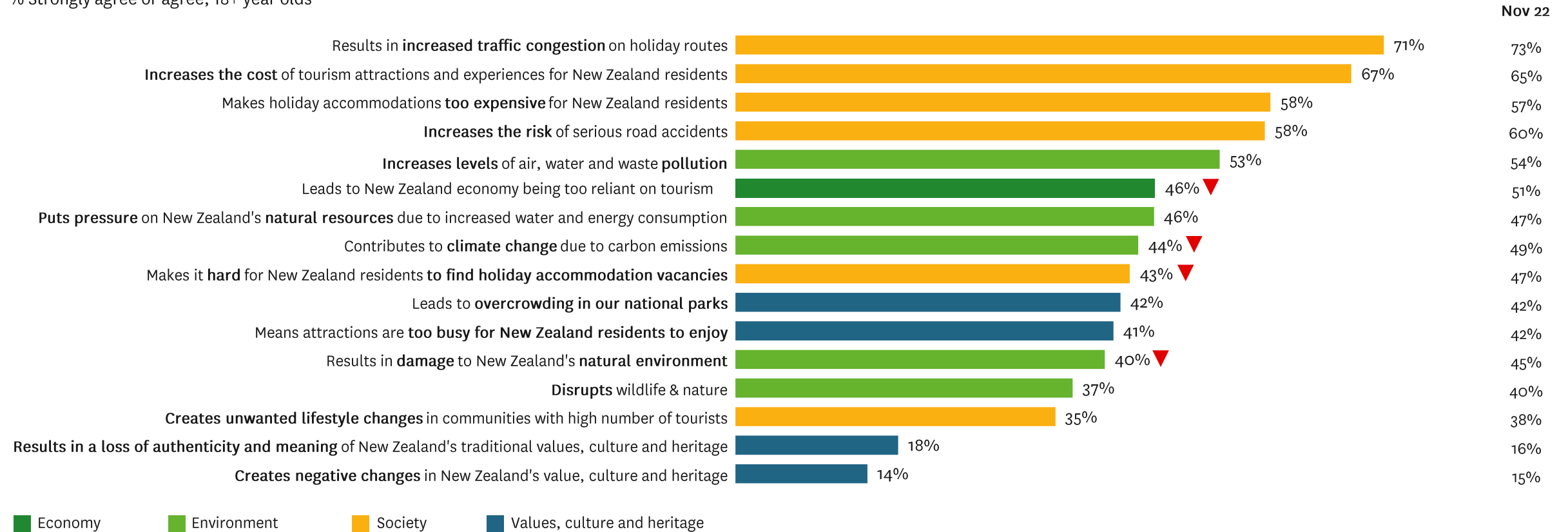
% 'Strongly agree' or 'Agree' with the statement, 18+ year olds



Some concerns relating to tourism remain traffic congestion, increased cost of tourism experiences and accommodation for NZers - the association of tourism with environmental damages has retracted this wave

Perceived downsides of tourism

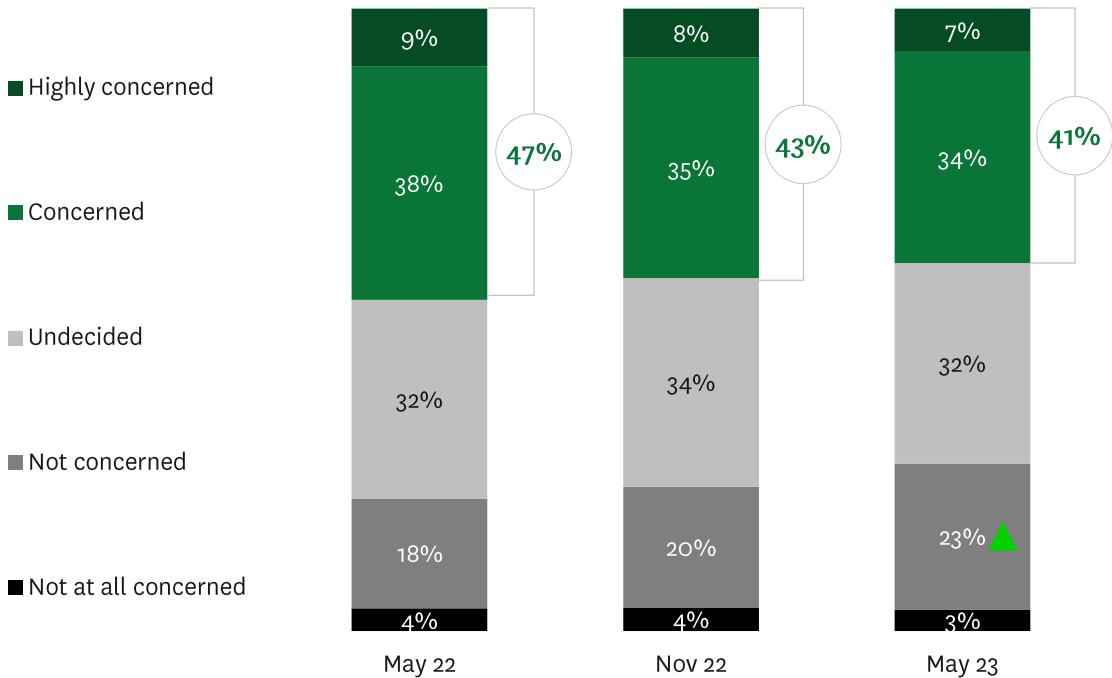
% Strongly agree or agree, 18+ year olds



The proportion of NZers who express concern about the impact that tourism has on New Zealand's natural environment has been declining over the 12 months

Levels of concern around impact of tourism on NZ natural environment

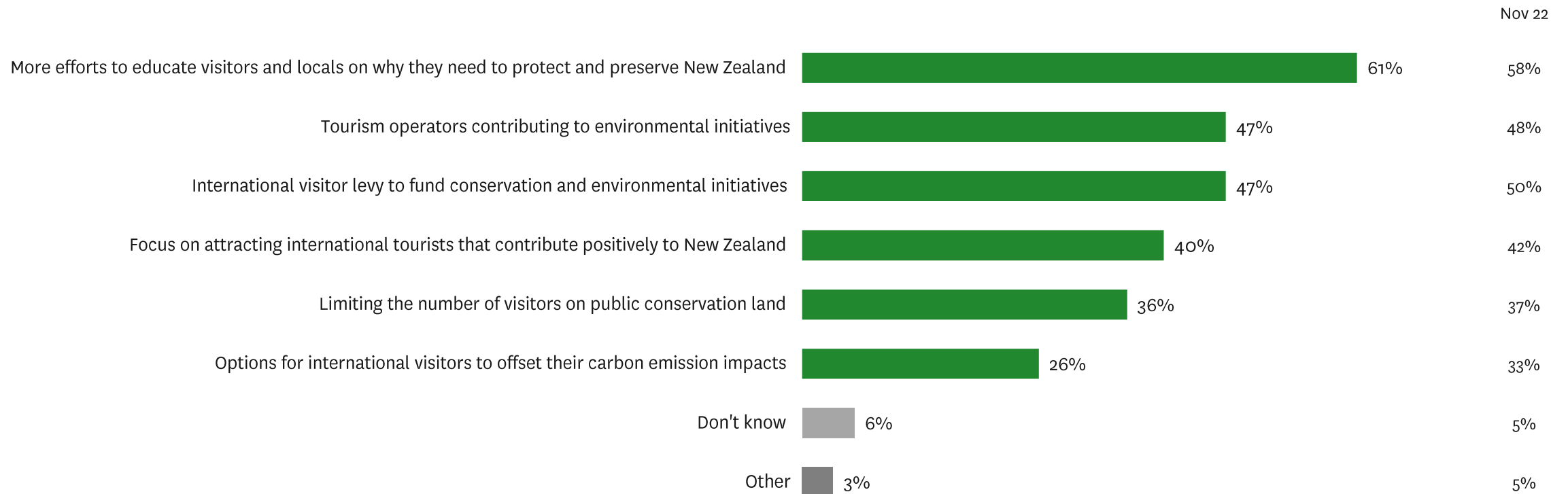
% All NZers, 18+ year olds



NZers' expectations about the mitigation of the environmental impacts of tourism hold, and include visitor education, contributions by the tourism operators, and visitor levy

Measures NZers would like to see in place to mitigate environmental impacts of tourism

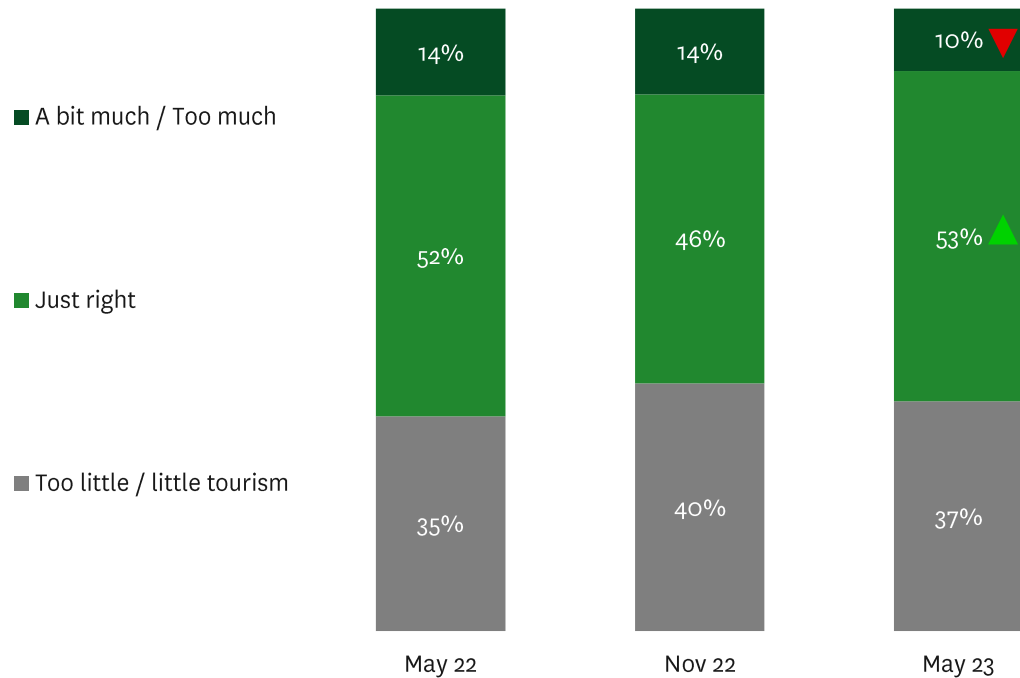
% All NZers, 18+ year olds



Fewer NZers consider that there is too much tourism in their communities compared to Nov 22; additionally, 37% of NZers would like to see more tourism in their communities

Perceptions of the level of tourism in (your) community

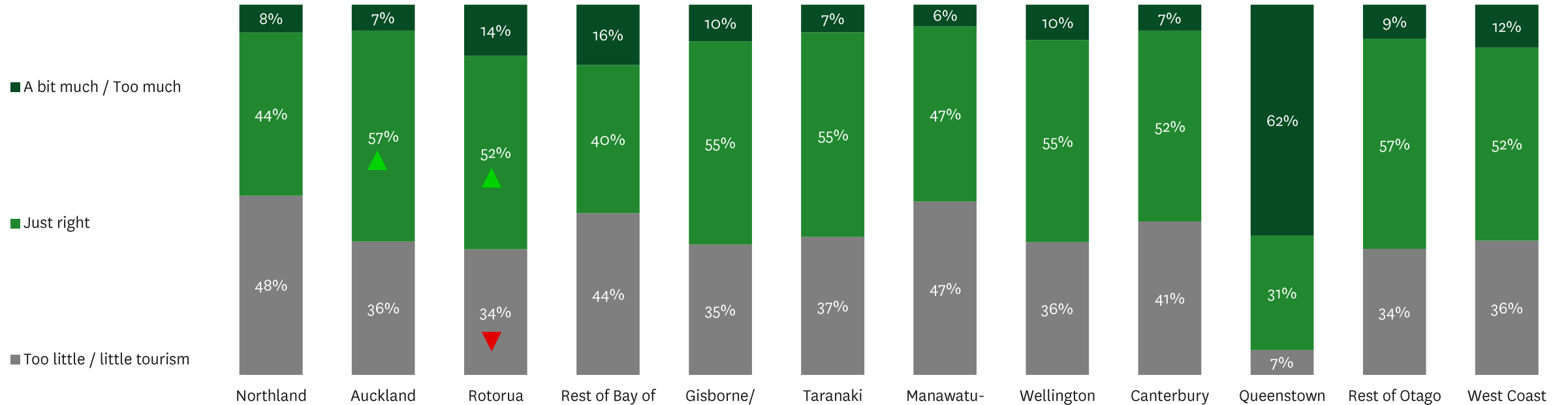
% All NZers, 18+ year olds



Perceptions of the level of tourism in communities

Perceptions of the level of tourism in (your) community (May 23)

% All NZers, 18+ year olds



| Nov 22 | | Northland | Auckland | Rotorua | Rest of Bay of Plenty | Gisborne/Hawkes Bay | Taranaki | Manawatu-Whanganui | Wellington | Canterbury | Queenstown | Rest of Otago | West Coast |
|--------|-----------------------------|-----------|----------|---------|-----------------------|---------------------|----------|--------------------|------------|------------|------------|---------------|------------|
| | A bit much / Too much | 13% | 12% | 13% | 9% | 13% | 7% | 15% | 8% | 11% | 64% | 13% | 12% |
| | Too little / little tourism | 45% | 46% | 50% | 47% | 43% | 45% | 40% | 32% | 36% | 6% | 30% | 41% |

Sample size: May 23 n = 1431

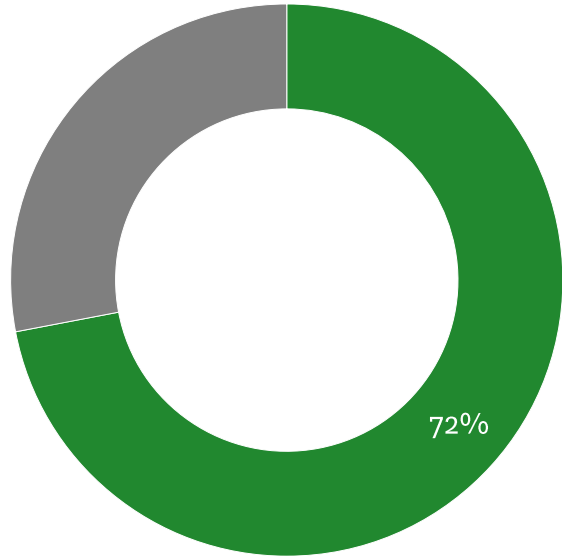
Northland = 100 | Auckland = 150 | Rotorua = 100 | Bay of Plenty = 50 | Gisborne/Hawkes Bay = 100 | Taranaki = 100 | Manawatu-Whanganui = 81 | Wellington = 130 | Canterbury = 150 | Queenstown = 150 | Rest of Otago = 100 | West Coast = 100 : 5 point scale where 1 = too little and 5 = too much

▲ ▼ Significantly higher / lower than Nov 22

While the perceived need for more investment into core infrastructure to support tourism remains high, there is less demand for improving leisure-related activities

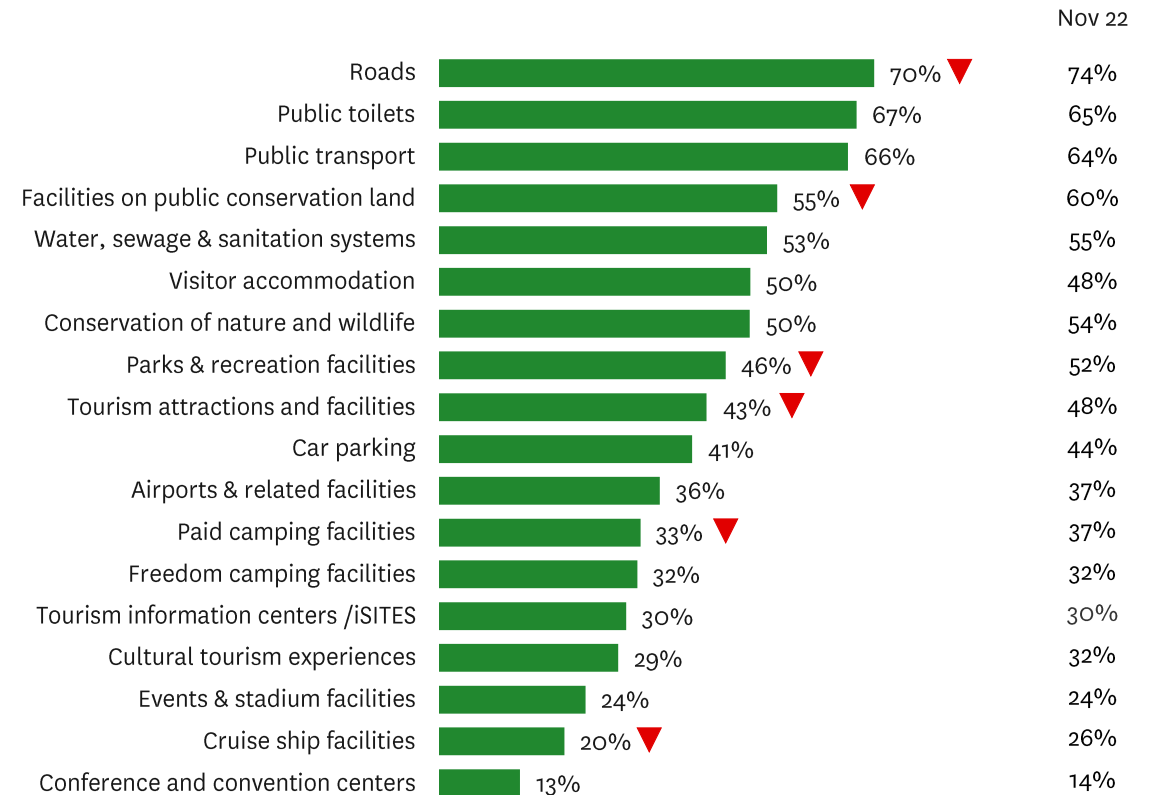
% NZers who think there is a need to invest more into infrastructure

% All NZers, 18+ year olds



Nov 22 69%

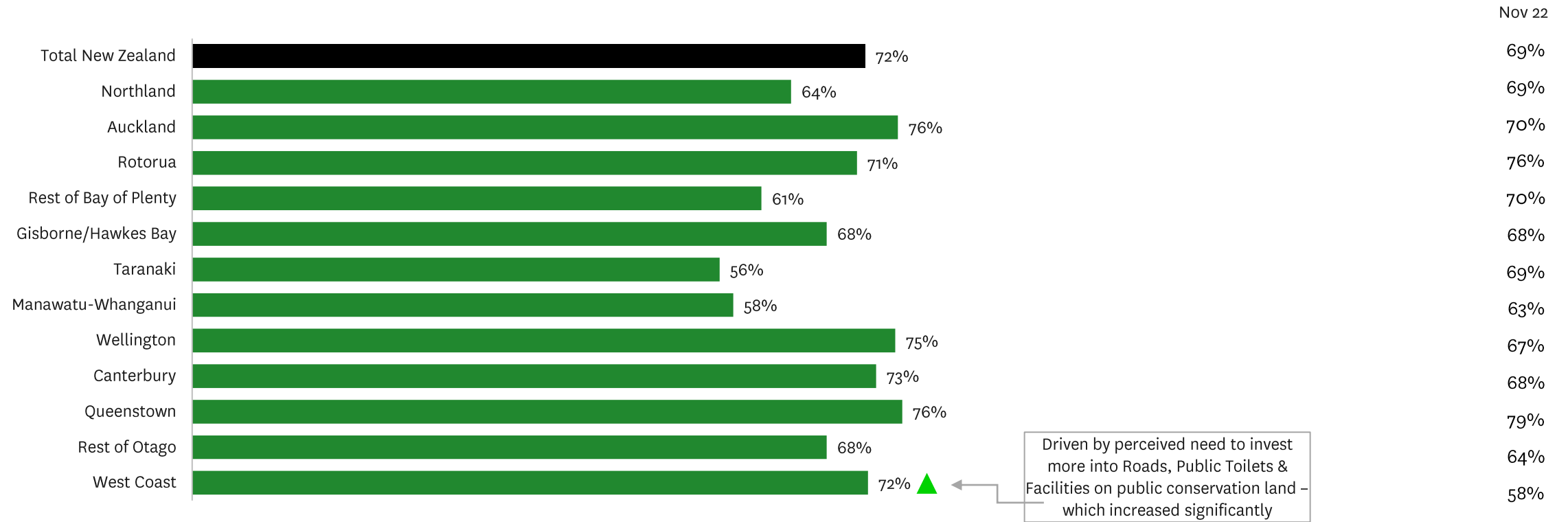
Priority areas for investment to support tourism in New Zealand



Many New Zealanders want to see more invested in infrastructure

% NZers who think there is a need to invest more into infrastructure by region

% All NZers, 18+ year olds



2

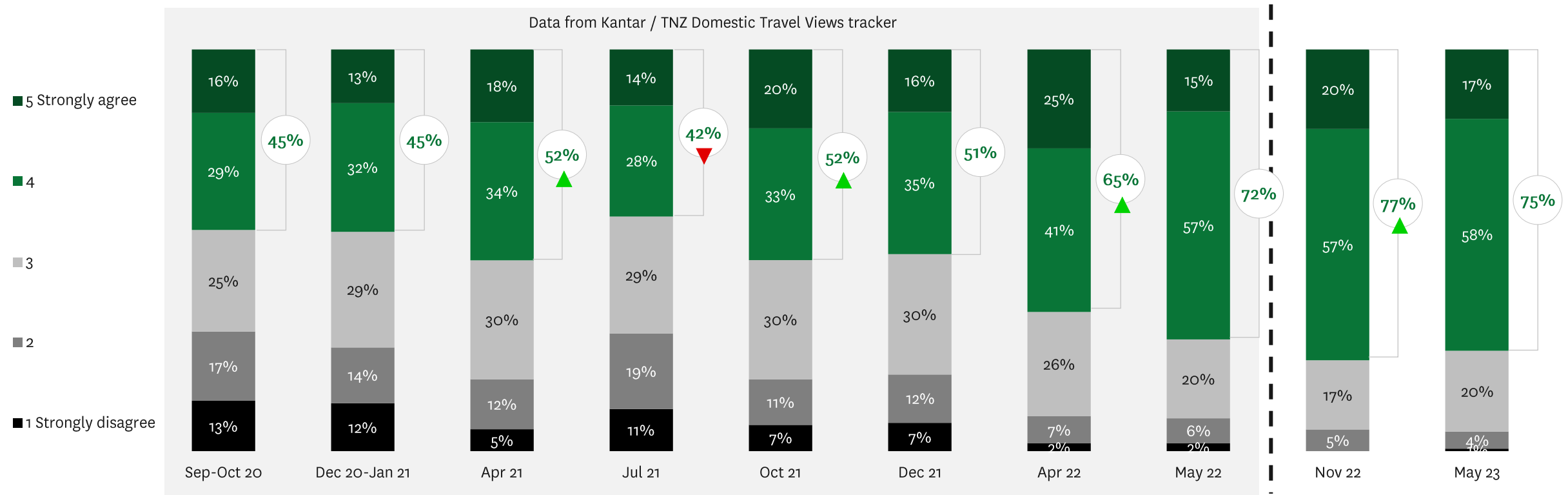
New Zealanders' views on international tourism



The majority of NZers are open to international tourists coming to New Zealand

Agreement with the statement: “New Zealanders are open to international tourists coming to New Zealand”

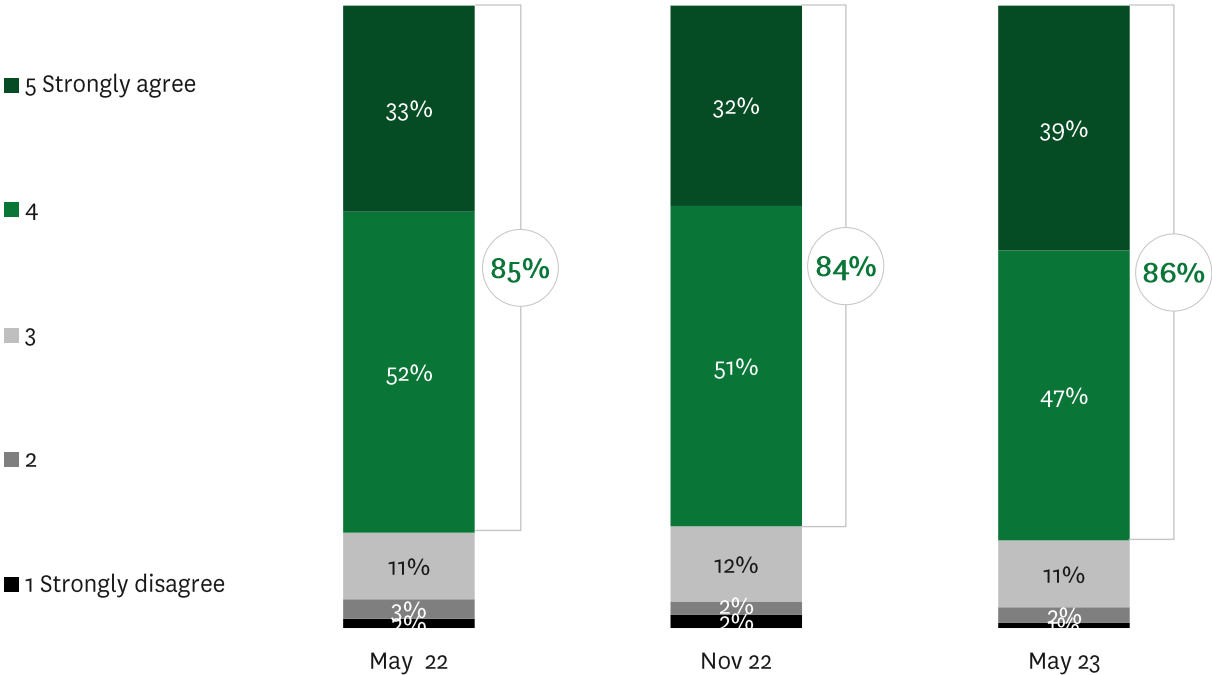
% All NZers, 18+ year olds



The overall sentiment towards international tourism remains strongly positive

Agreement with the statement: “International tourism is good for New Zealand”

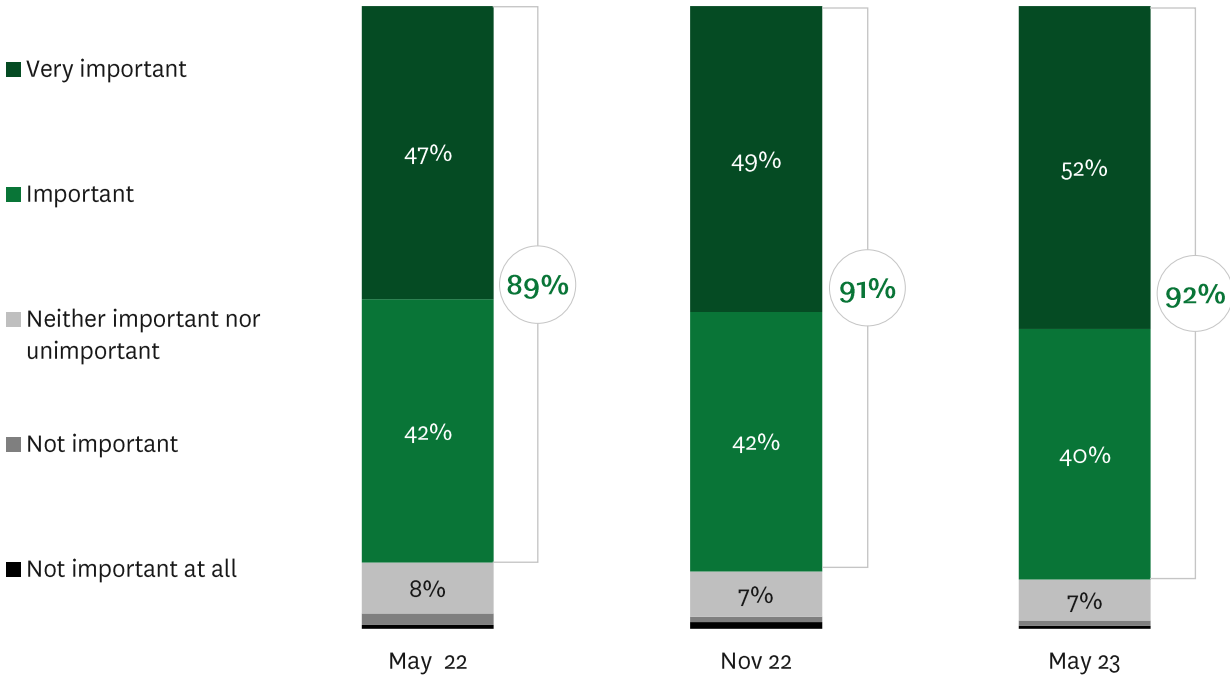
% All NZers, 18+ year olds



The vast majority of NZers believe that international tourism is important for the New Zealand economy

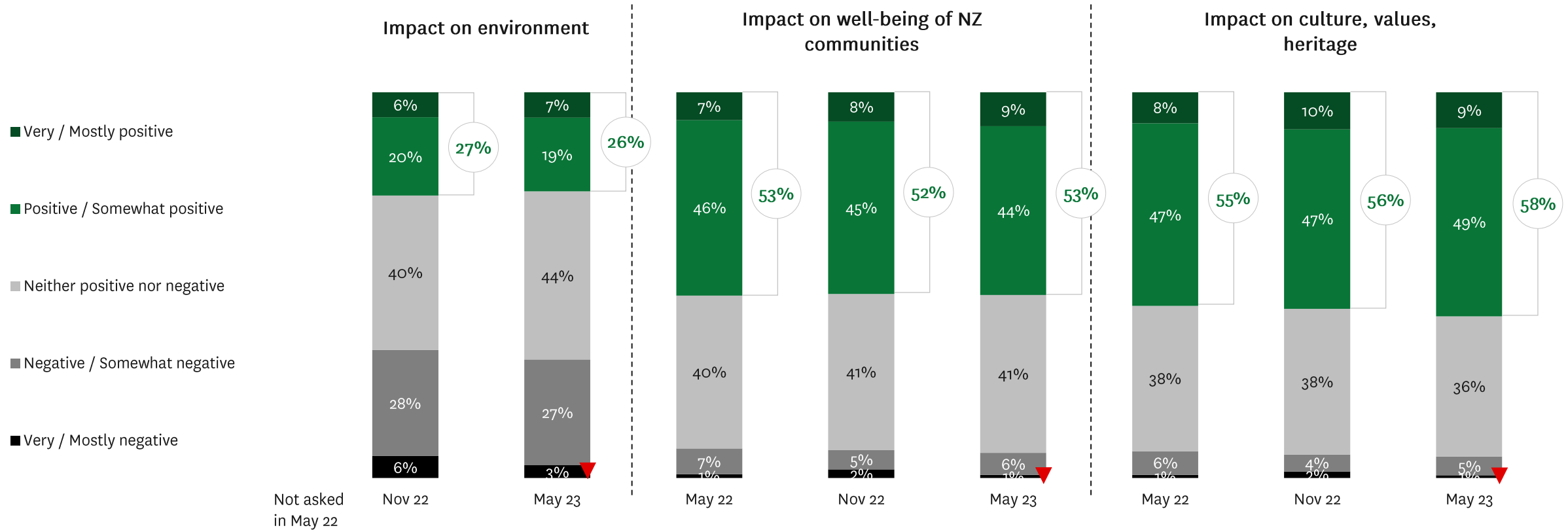
Importance of international Tourism for the New Zealand economy

% All NZers, 18+ year olds



NZers' perceptions of the impacts of international tourism are stable, with a slight upward trend seen for culture, values and heritage

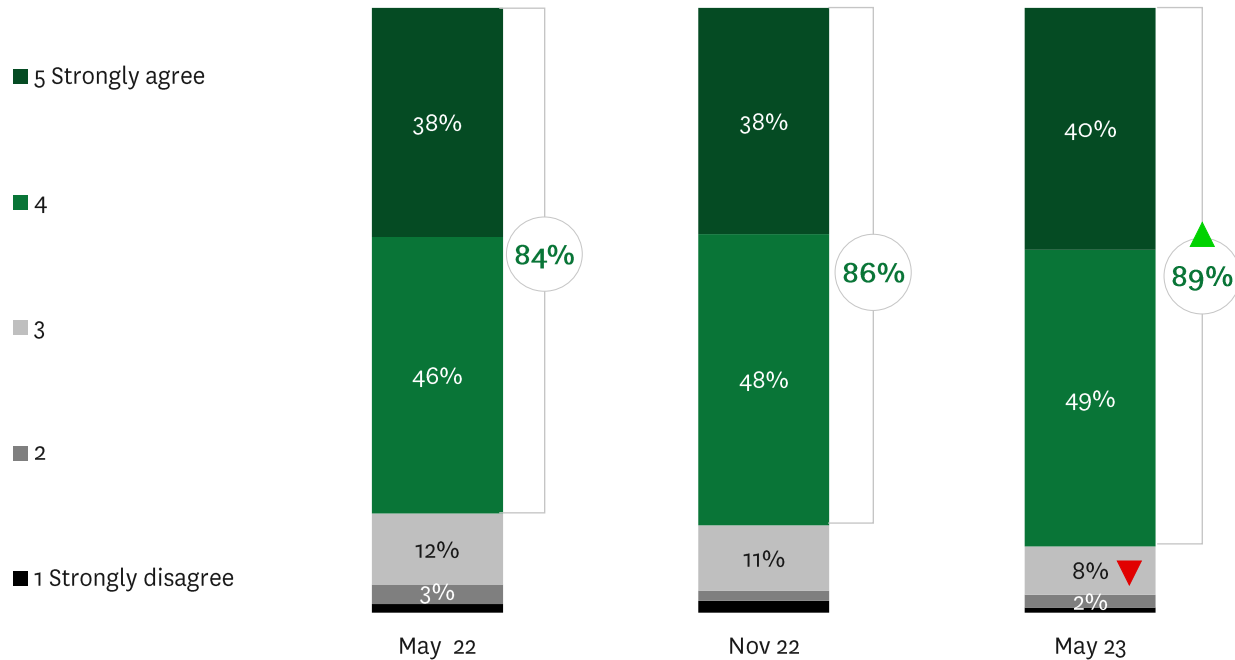
Impact of international tourism on New Zealand across three capitals: environment, society and culture



There is a growing recognition among NZers of the importance of international tourism to post pandemic economic recovery

Agreement with the statement: “**International** tourism is an important part of New Zealand’s post pandemic economic recovery”

% All NZers, 18+ year olds



3

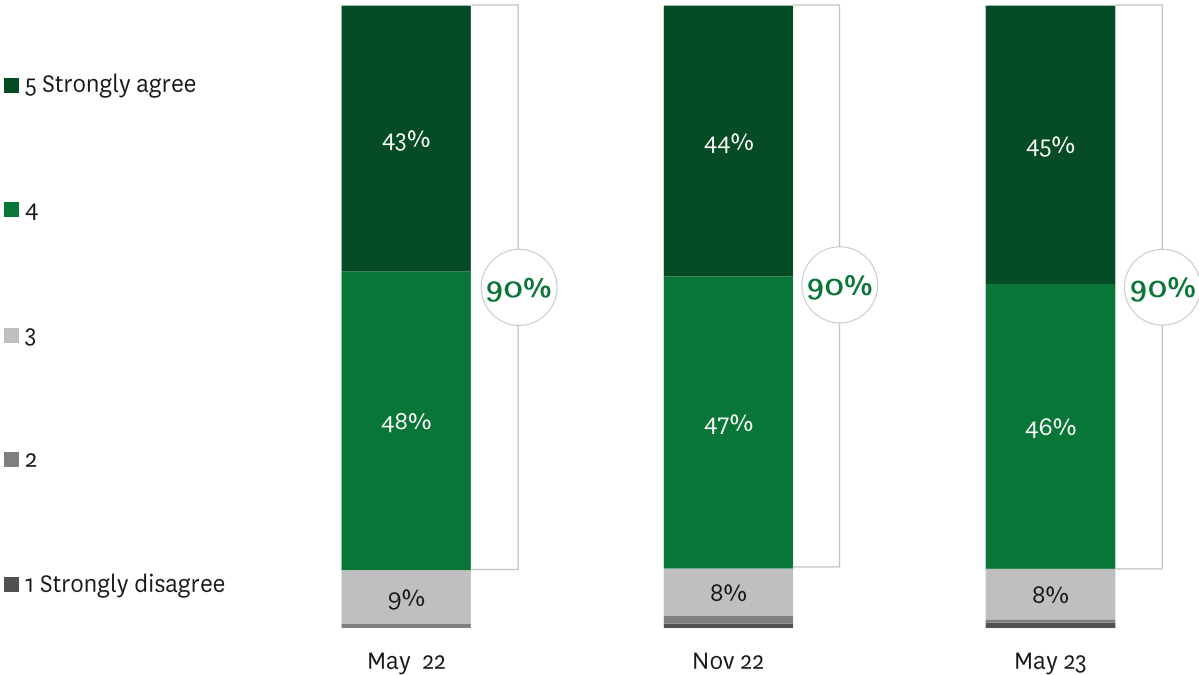
New Zealanders' views
on
domestic tourism



The vast majority of NZers continue to agree that domestic tourism is good for New Zealand

Agreement with the statement: “Domestic tourism is good for New Zealand”

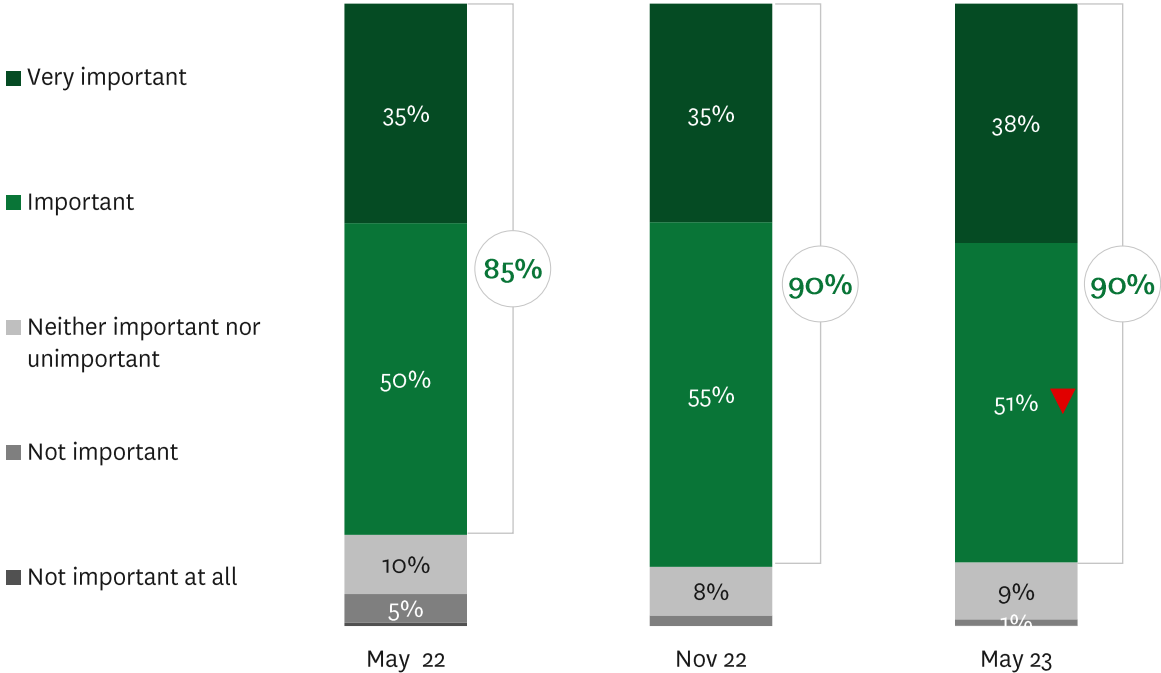
% All NZers, 18+ year olds



The vast majority of NZers continue to agree that domestic tourism plays a crucial role in contributing to New Zealand's economy

Importance of domestic Tourism for the New Zealand economy

% All NZers, 18+ year olds



Perceptions of domestic tourism's impacts on the environment, social well-being of local communities and culture & values remain consistently positive, above the levels for international tourism

Impact of **domestic** tourism on New Zealand across three capitals: environment, society and culture

