

Mood of the Nation

New Zealanders' perceptions of international visitors

March 2019



Introduction

New Zealand's ability to deliver a world-class visitor experience has seen the value of international tourism surpass \$16 billion per year and become New Zealand's top export earner.

The warm welcome of New Zealanders plays a critical role in the success of New Zealand as a desirable visitor destination, so 'Mood of the Nation' research is conducted twice a year to provide insight into New Zealanders' sentiment about international tourism.

The results are used to help inform industry and government activity to ensure that the sector enriches our communities.

Top line results, March 2019: Perceptions of New Zealanders

- 93% agree or strongly agree international tourism is good for the country
- 91% are proud that New Zealand is an attractive tourist destination
- 86% take pride in welcoming international visitors
- 12% are aware of tourism's value as New Zealand's number one export industry
- 46% agree New Zealand attracts the right number of international visitors
- 26% think the number of tourists is too high
- 43% percent believe tourism puts too much pressure on New Zealand
- 33% agree that the government and industry are taking actions to address the pressures of tourism

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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, to ensure we provide robust insights at the regional level. We set minimum quotas to ensure sufficient representation from traditional tourism hotspots.

*n = 500 sample used prior to November 2018

Northland	n = 100	Manawatu-Whanganui	n = 80	Queenstown	n = 101
Auckland region	n = 100	Wellington region	n = 101	Elsewhere in Otago	n = 50
Rotorua	n = 50	Other North Island	n = 30	West Coast	n = 100
Gisborne / Hawkes Bay	n = 101	Christchurch	n = 100	Other South Island	n = 20
Taranaki	n = 101	Elsewhere in Canterbury	n = 49		



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

Wave 8: 26 February to 10 March 2019



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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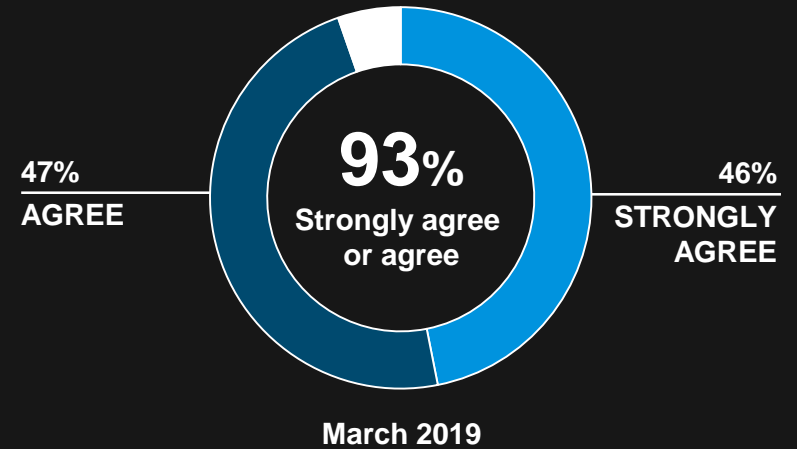
Key insights

KEY INSIGHTS (page 1 of 3)

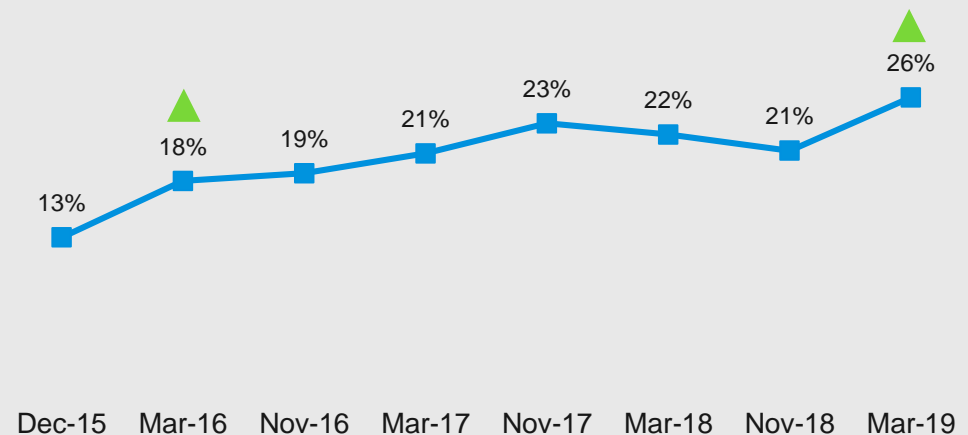


- The vast majority New Zealanders agree that international tourism is good for New Zealand
- Most people are proud that New Zealand is an attractive tourist destination and are welcoming of international visitors
- Over the years there has been an increase in the proportion of New Zealanders who think that the number of tourists is too high
- This trend has continued and is now at an all time high of 26%. Despite this, around half of New Zealanders still agree 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

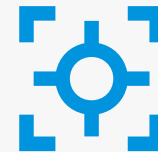
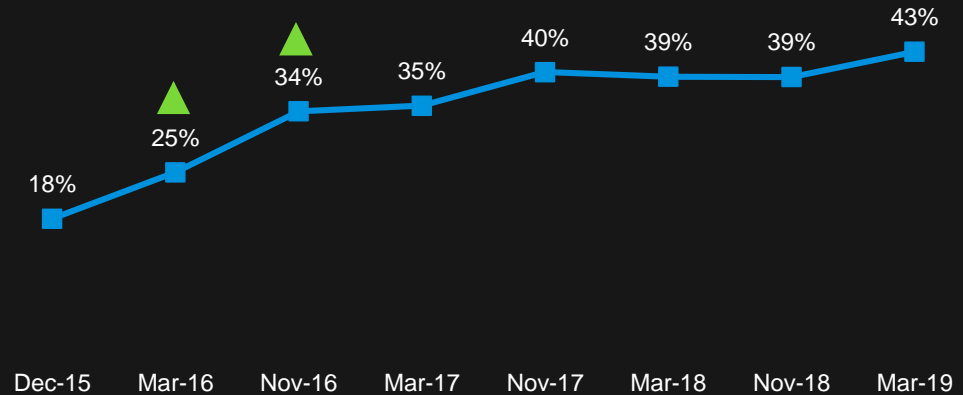


KEY INSIGHTS (page 2 of 3)



- The percentage of New Zealanders who think that international tourism puts too much pressure on New Zealand has been relatively stable in the past couple of years, but shows an indicative increase over time
- This view is driven by three key factors: (1) perceptions that New Zealand lacks infrastructure to support the growing number of tourists; (2) perceived impact on road congestion and safety; (3) perceived adverse impact of tourism on the environment
- Queenstown is consistently seen as the area most under 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

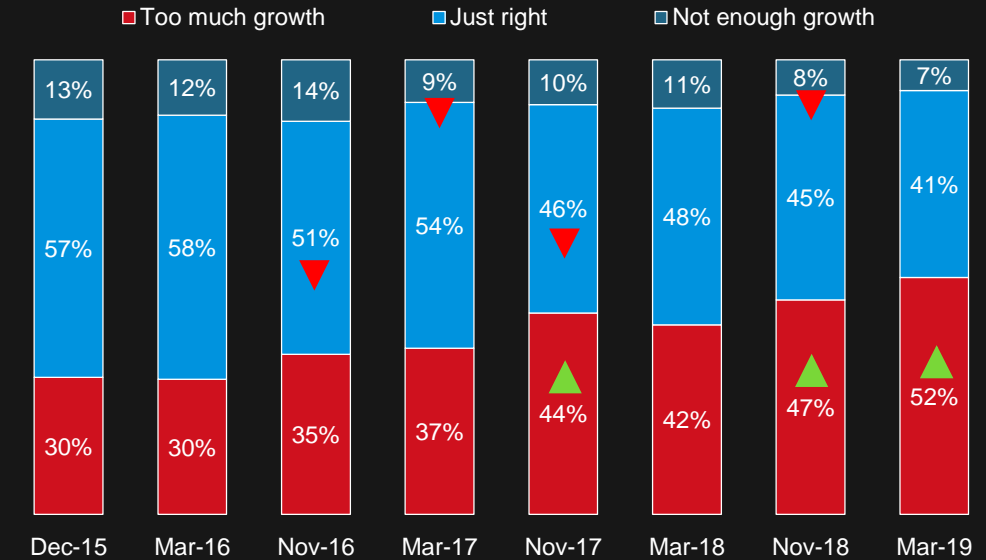
- Pressure on infrastructure
- Increased traffic congestion
- Environmental damage
- Accommodation shortage
- Overcrowding

KEY INSIGHTS (page 3 of 3)



- 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 just over half of New Zealanders (52%)

PERCEPTIONS OF PREDICTED GROWTH



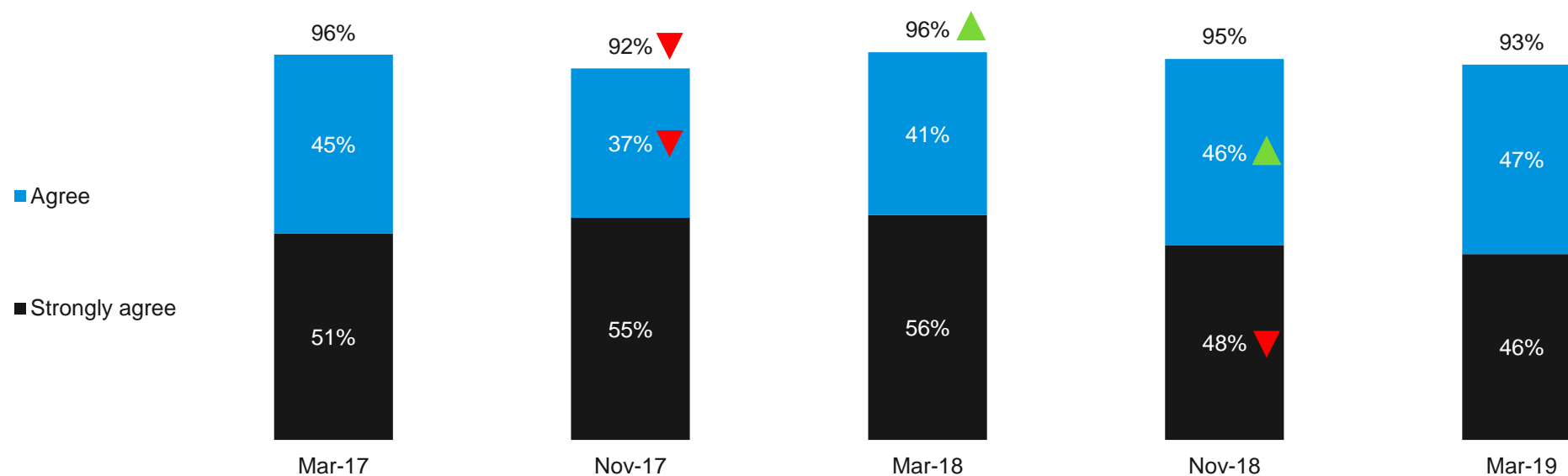
3

Detailed insights

There is a widespread agreement that international tourism is good for New Zealand, however the proportion of New Zealanders who strongly agree with the statement has declined compared to the levels seen a year ago

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; Mar-19 n = 1,083

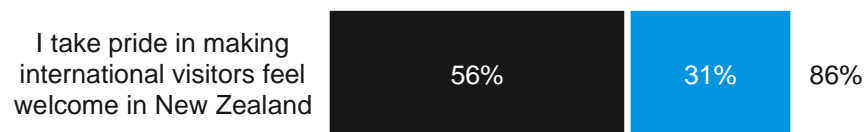
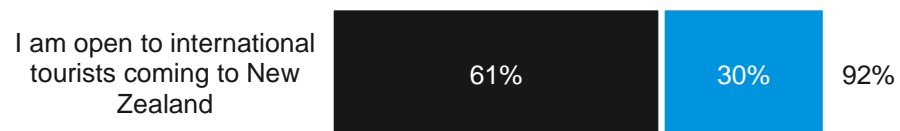
▲ Significantly higher / ▼ Significantly lower than previous wave at 95%

New Zealanders generally agree that they personally are open and welcoming of international tourists, however far fewer agree that other New Zealanders feel the same way; this is stable compared to November 2018

Attitudes towards international visitors

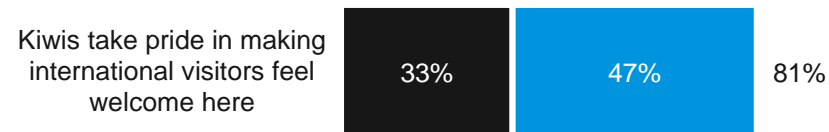
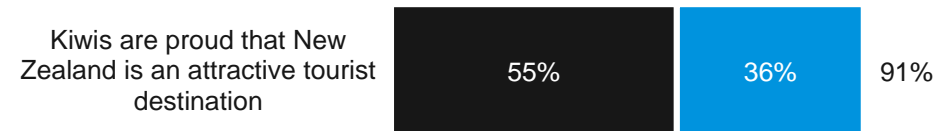
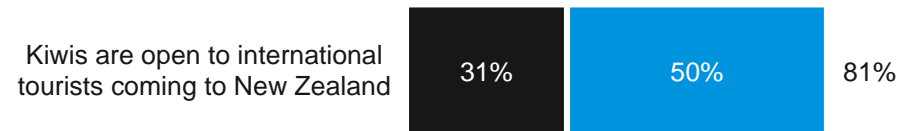
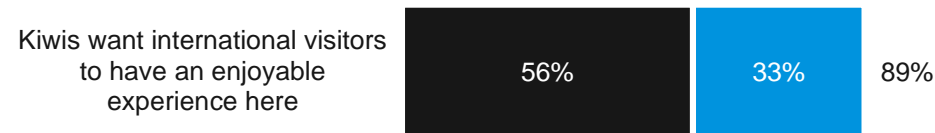
% agree, 18+ year olds, Mar-19

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: Mar-19 n = 1,083

Personal experience and information in the national media outlets have an equally large influence on the views New Zealanders have about international tourism

What influences the opinions on international tourism

18+ year olds, Mar-19

		<u>Level of influence</u>	
		1 st most significant	2 nd most significant
1	What I experience first-hand in my daily life	39%	17% ▼
2	What I see / hear about tourism from national media outlets	39%	15% ▲
3	What I hear from friends / family / colleagues that they experience first hand in their daily lives	10% ▲	37%
4	What I see / hear about tourism from regional media outlets	6%	17%
5	What I see / hear about tourism from local media outlets	5%	14% ▲

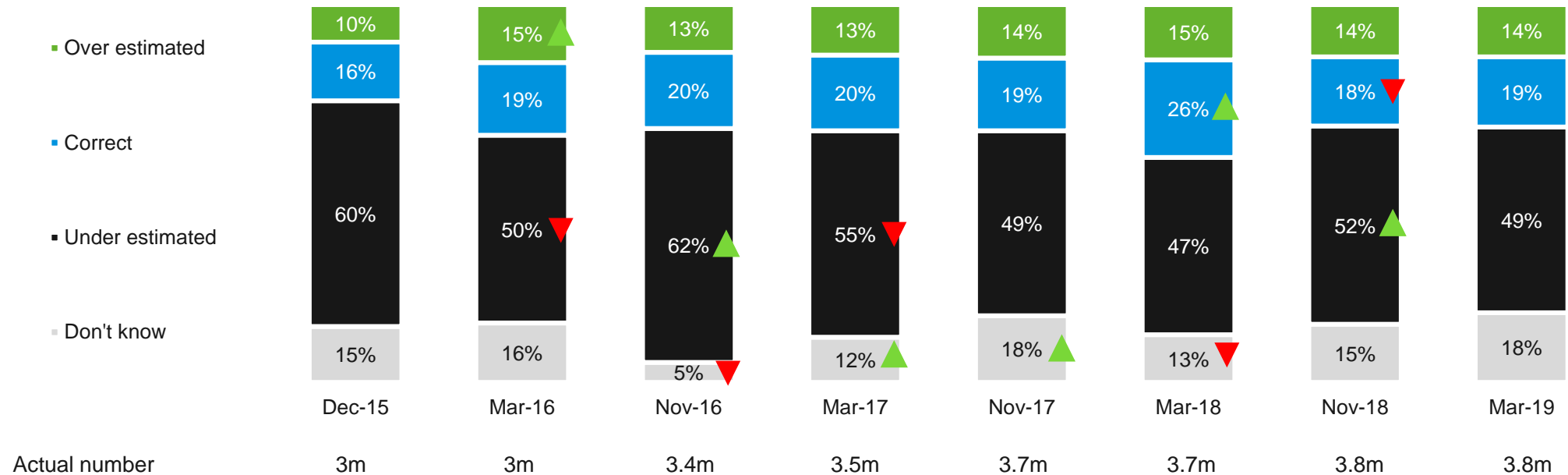
▲ ▼ Significantly higher / lower than previous wave at 95%

Base: New Zealanders aged 18 plus: Mar-19 n = 1,083

The majority of New Zealanders remain largely unaware of the annual international visitor volume

Knowledge of annual visitor numbers

%, 18+ year olds

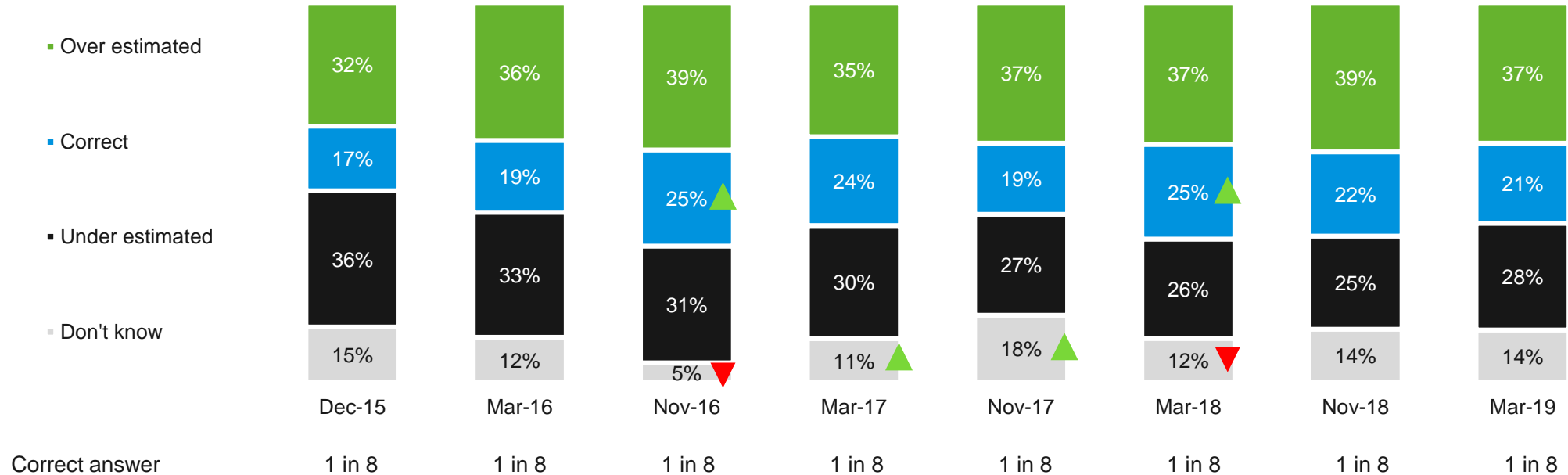


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▲ ▼ Significantly higher / lower than previous wave at 95%

Most New Zealanders overestimate the number of people directly or indirectly employed in the tourism industry; this perception has not changed over time

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



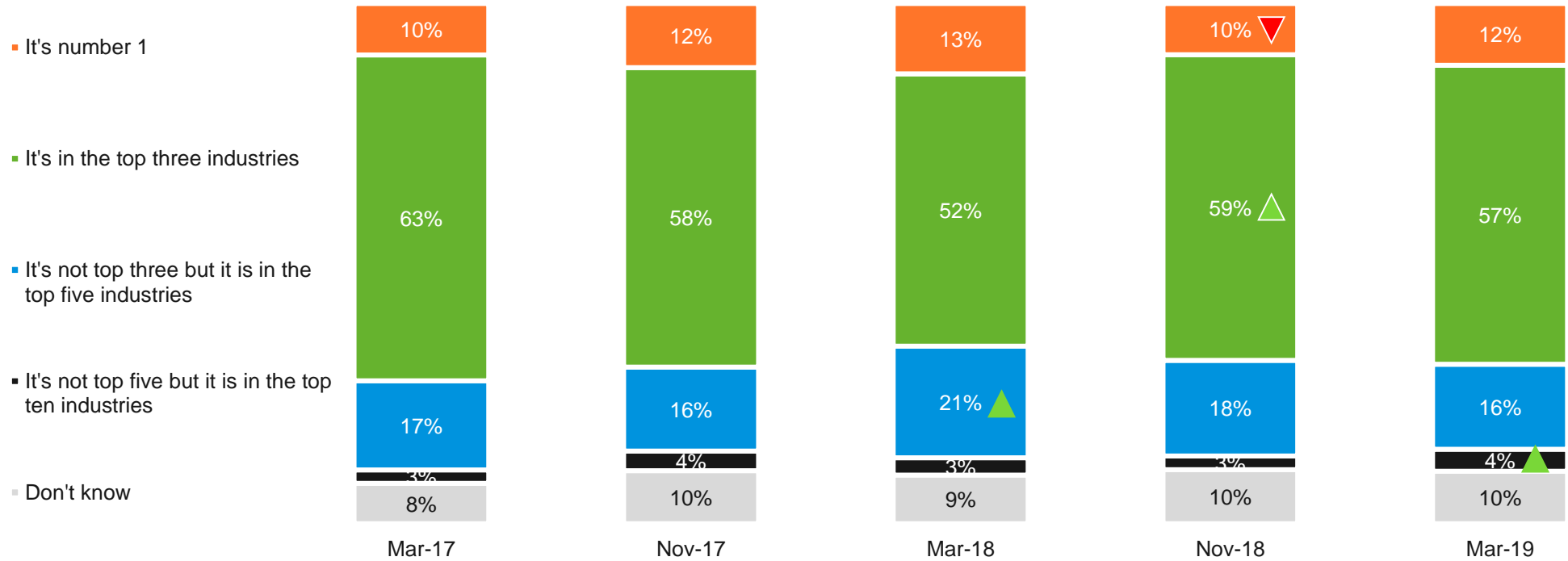
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▲ Significantly higher / lower than previous wave at 95%

New Zealanders are still largely unaware that tourism is New Zealand's number 1 export industry, with most thinking it is in second or third position

Knowledge of the value of the tourism industry

%, 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; Mar-19 n = 1,083

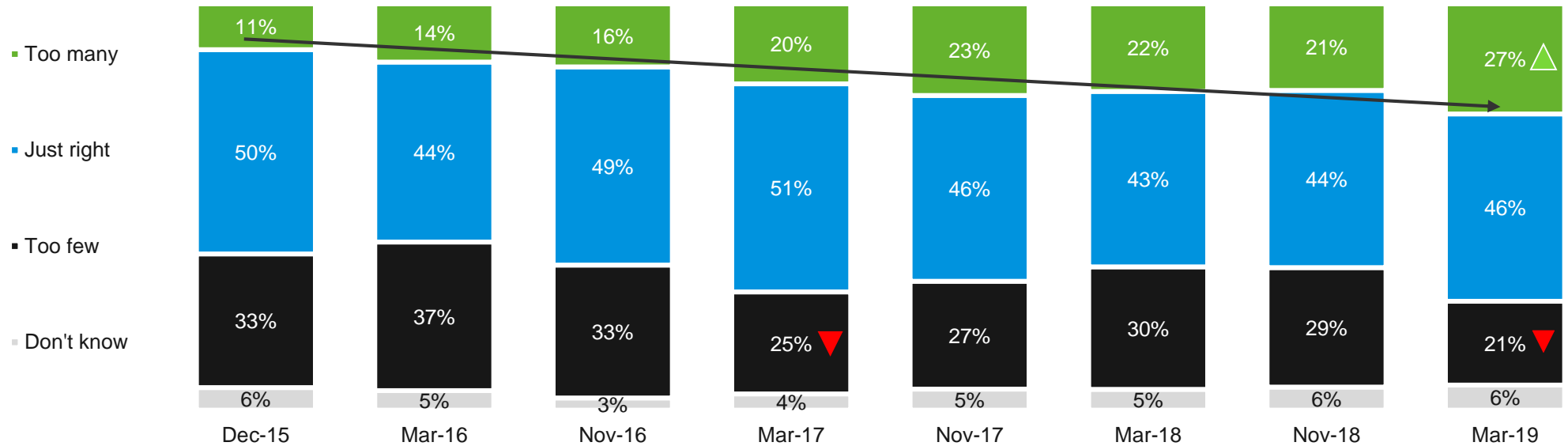
▲ ▼ Significantly higher / lower than previous wave at 95%

There has been a significant shift in the perception of international visitor volumes, with more New Zealand saying that current volumes are too high compared to November 18

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

%, 18+ year olds

Based on **perceived** 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; Mar-19 n = 1,083

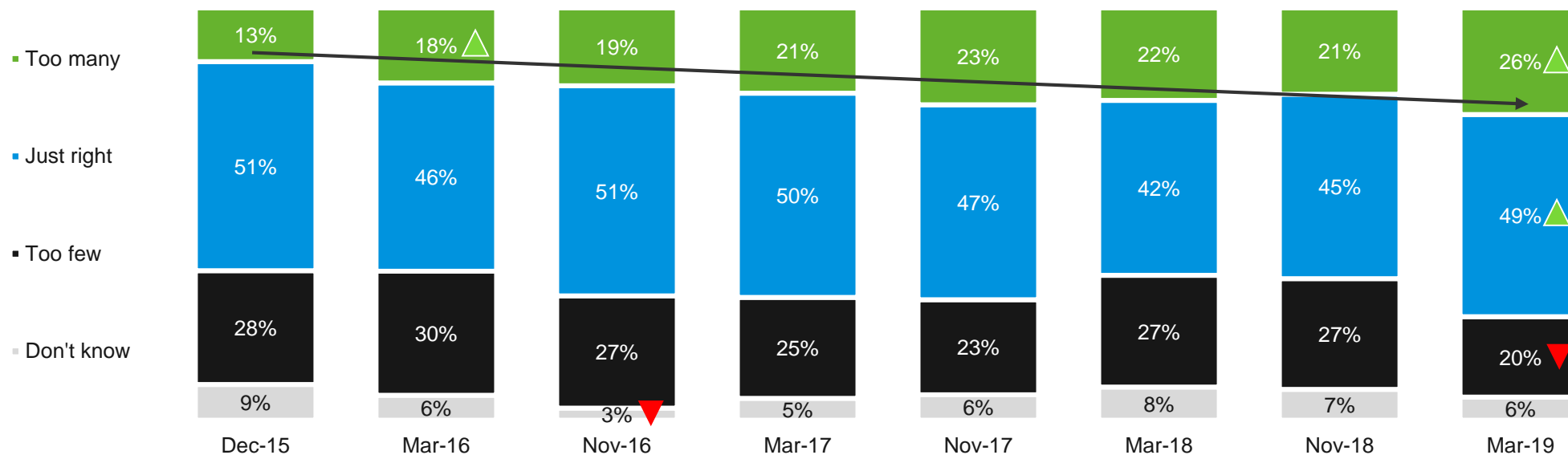
▲ ▼ Significantly higher / lower than previous wave at 95%

While most Kiwis think that New Zealand attracts the right number of visitors, the proportion who think visitor numbers are too high has increased significantly compared to November 2018

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

%, 18+ year olds

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; Mar-19 n = 1,083

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

Overcrowding, a lack of adequate infrastructure, and concerns around environmental damage remain the top reasons why some New Zealanders feel there are too many international visitors

Themed verbatim reasons for there being **too many international visitors (26%)**



Overcrowding

- “The crowds spoil the remote experience, and lead to urbanisation in what were remote, back-country places, e.g. Wanaka, Arthurs Pass, Glenorchy, Tekapo, Arrowtown, even Queenstown. They have lost their charm”
- “Overcrowding in tourist locations in both the North and South Islands”
- “Main cities are constantly filled with international tourists all year round, making it very crowded”
- “Often tourists overcrowd certain attractions in NZ which makes it hard for New Zealanders to enjoy the attractions themselves”
- “Overcrowding in all our tourist destinations”
- “Limited number of tourist destinations, concentrating people in “bottle neck” areas”
- “Popular spots such as Milford Sound and Queenstown are bursting at the seams”

Lack of Infrastructure

- “Too much pressure on local councils and infrastructure, e.g. freedom camping and waste. More central government money is needed to assist local councils/ ratepayers to bear the burden”
- “We are not yet geared up to take many more tourists. We need further develop the infrastructure and amenities. Tourism is starting to impact on our ‘clean green’ image”
- “We run a serious risk of killing the goose that lays the golden egg If we don’t do something very soon to improve our infrastructure in relation to tourism”
- “New Zealand doesn’t have the infrastructure to support the number of overseas tourists coming in, and NZ holiday makers are being negatively impacted by the volume of overseas tourists”
- “We have to make sure the infrastructure can cope with the number of visitors & also keep facilities available for domestic travellers”

Environmental damage

- “I would like to see fewer low budget (e.g. campers, backpackers) and more high budget tourists who would not create as much waste and pollution but contribute to the economy in a more efficient manner. It is hard to market ourselves as 100% pure when there are campervans in parks and waste/rubbish left lying around”
- “It seems more recently that there are a lot of tourists – especially freedom campers – who are disrespectful to our environment”
- “It is impacting too much on the environment. It needs to be more regulated”
- “There’s always lots of tourists around and too many of them end up destroying our scenic areas and the environment, overflowing camping grounds and freedom camping”
- “There are too many ‘freedom campers’. Tourists cause erosion of the environment”
- “We’re seeing the impact of visitor numbers on our environment”

Base: n = 277

Perceived economic benefits to New Zealand, employment opportunities, and perceptions that there is still capacity if managed well 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 (27%)



Economic Benefits and Job Creation

- “Tourism is worth a lot of money to NZ. Also it creates employment for many new Zealanders. Although tourism is significant, and we are accommodating to the needs of overseas guests, there is room to increase, as there is so much more that we can offer, we need to be prepared for increased numbers as more and more people see NZ as a holiday destination”
- “Good for the economy, providing they spend money here”
- “It would be more beneficial to the economy for a larger number of tourists to visit NZ”
- “International visitors contribute a huge amount of money to the economy”
- “More visitors would help boost the economy further”
- “New Zealand has many beautiful and interesting places and we could do with much more international tourists and visitors to add a boost to our economy”
- “More tourists will generate jobs and income for the country”
- “We have much more potential - lets bring in more money as this equals jobs. Also more exposure means better opportunities for us internationally too”
- “We could accommodate more, a higher number of tourists means a higher number of jobs and a better economy”
- “New Zealand is a beautiful place. It has a lot offer. Tourism could create more jobs for New Zealanders”

Managed Expansion

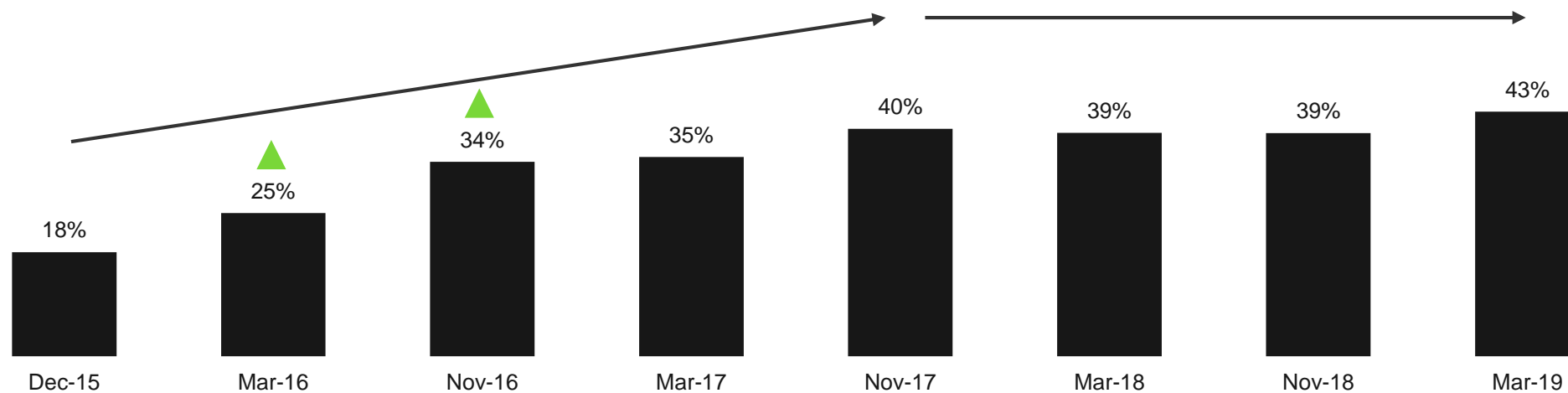
- “There are more visitors than Queenstown can handle. With improvements to the town it would not be too many”
- “Tourism industry can support more tourists providing infrastructure for them is improved proportionately”
- “Some regions get a lot of tourism but I think there is room to expand tourism in other regions”
- “Managed properly there is room for more”
- “We have the capacity to absorb and service many more. The limiting factor is our infrastructure, and to some degree, our attitude to providing quality service. We could learn a lot from countries like Spain”
- “More would be good for the economy, but we need to balance it with looking after our natural environment - the reason tourists come here”

Base: n = 211



43% of New Zealanders think the current number of international tourists puts too much pressure on New Zealand; this perception has stabilised in recent years

Perceptions that tourists put too much pressure on New Zealand

%, 18+ year olds



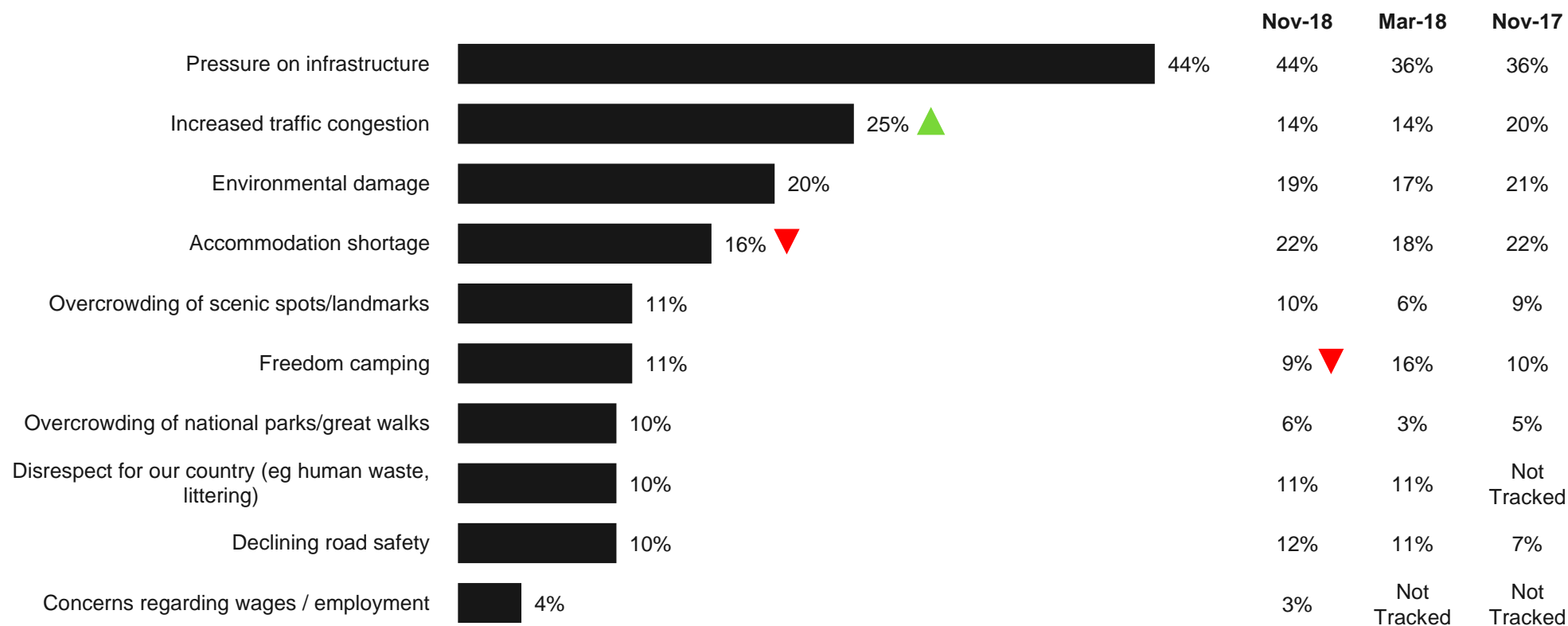
Base: New Zealanders aged 18 plus: Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084; Mar-19 n = 1,083

  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 traffic congestion have increased significantly compared to November 2018

Perceptions of how tourism puts pressure on New Zealand

%, those who say "too much pressure", Mar-19



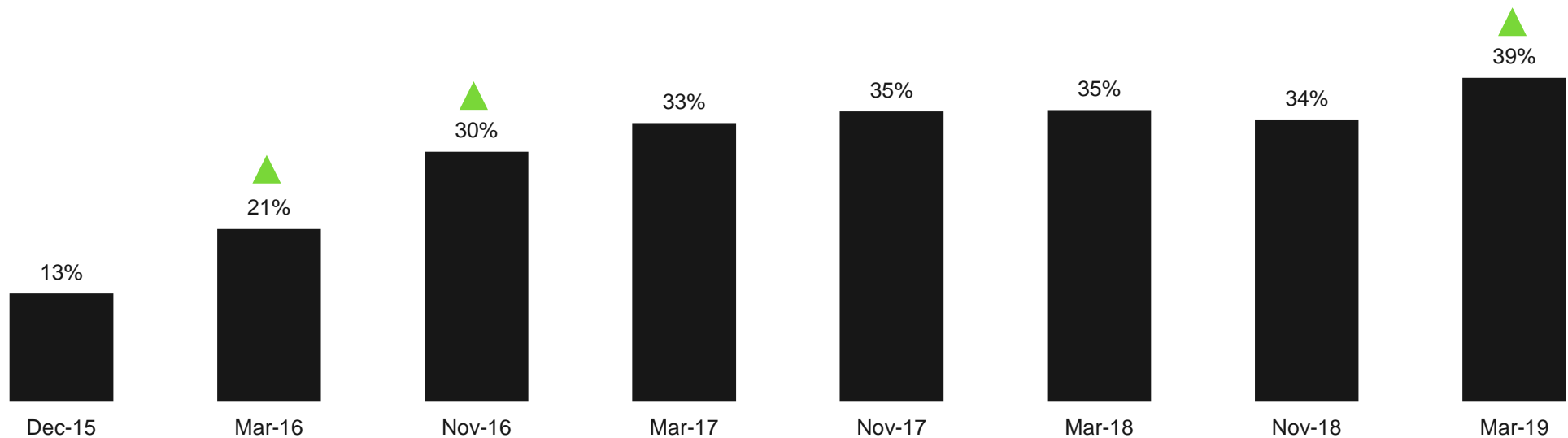
Base: Those who say "too much pressure": Mar-19 n = 472
Notes: Based on unprompted verbatim

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



There has been a significant increase in the proportion of New Zealanders who believe that some places are under more pressure than others, rising to 39%

“Some places are under more pressure”

% agree, 18+ year olds



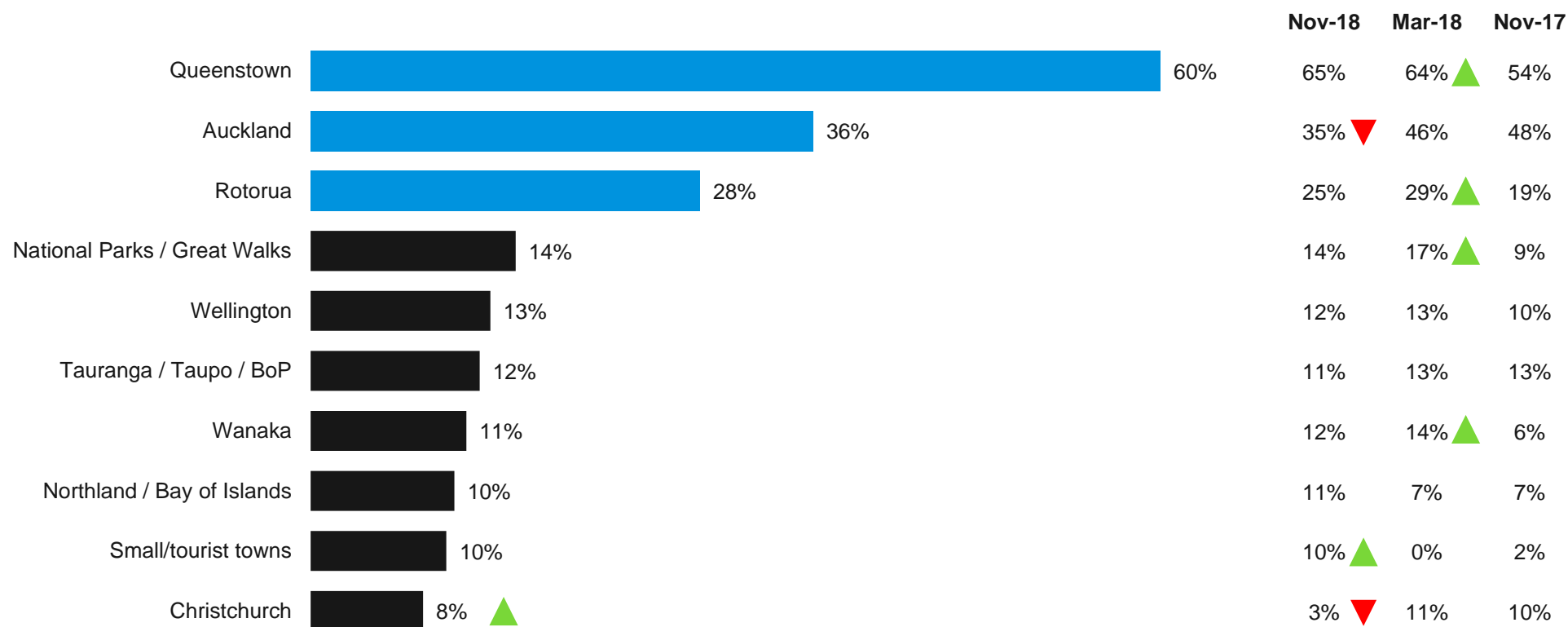
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  Significantly higher / lower than previous wave at 95%

Queenstown, Auckland and Rotorua continue to be the top three locations perceived to be under more pressure than others

Which places?

%, Mar-19, those who say some places are under more pressure

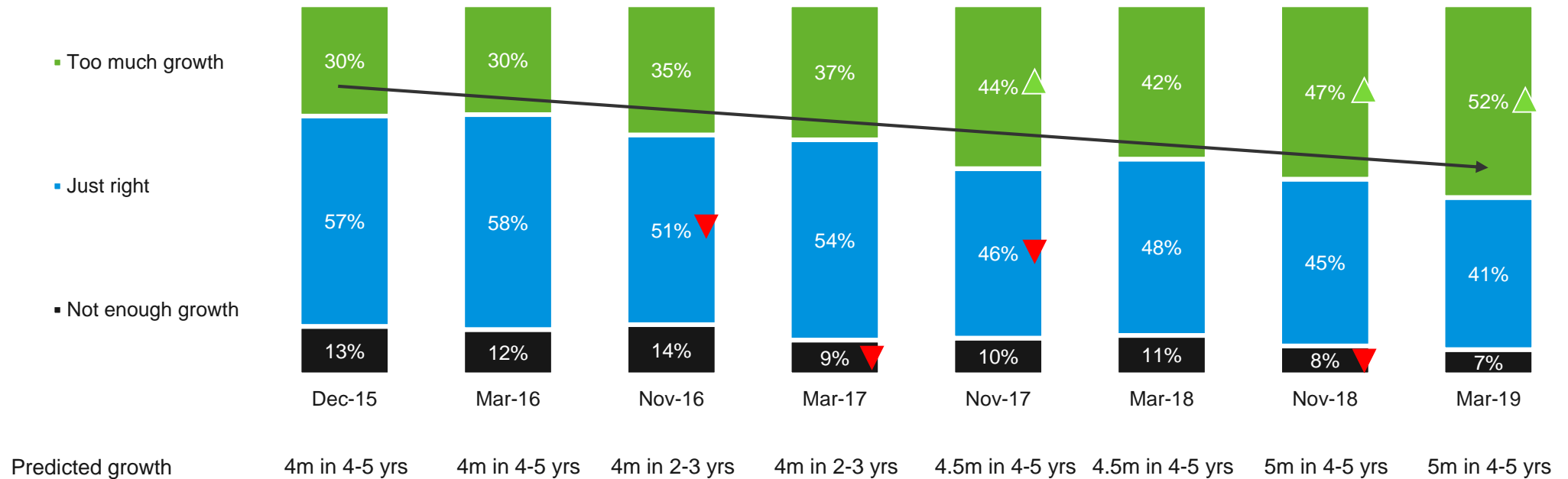


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▲ ▼ Significantly higher / lower than previous wave at 95%

The proportion of New Zealanders who think that the predicted growth in annual visitor numbers is too high continues to move upwards, increasing significantly again this March to over half of New Zealanders

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; Mar-19 n = 1,083

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

A lack of adequate infrastructure, overcrowding and environmental concerns are the key reasons why New Zealanders feel there is too much predicted growth, this view is consistent with previous waves

Themed verbatim reasons for there being **too much predicted growth (52%)**



Lack of infrastructure

- “We're not prepared for that many, it's good for businesses, not so good for our infrastructure”
- “Our current roads and accommodation providers will not handle that number”
- “Infrastructure cannot keep up. Given the West Coast experience with freedom camping, demand has outstripped supply, and regulations are inadequate”
- “Because more tourists seem to be freedom campers and NZ is not equipped to cater for more until upgrades are done to facilities”
- “Lack of infrastructure and room - we are overrun and its damaging the experience”
- “Lack of resources (hotels, experiences, overloaded tourist hotspots, facilities and weird public holiday rules) to cope with this number that will lead to a less than desirable tourist experience and could start to cause tourists to look elsewhere”

Overcrowding

- “Because there needs to be space for NZ citizens to enjoy the tourist spots too. If the number of internationals gets too high it will overcrowd the popular spots, attractions, and accommodation”
- “Parts of NZ are all ready getting overcrowded with tourists”
- “I live in a high tourism area: too many campervans and hire cars on the roads that can not cope with the volume”
- “This number is very big. We have got the same roads and places to live or accommodate. So everywhere will be very crowded”
- “If we have too many visitors it will diminish the experience for many visitors e.g. popular destinations being too crowded, unable to get accommodation at peak times, restaurants in tourist destinations being fully booked etc.”
- “Places will become overcrowded”

Environmental damage

- “We cant take care of our natural environment as it is and they want to bring in more visitors which means more pollutants in the environment we mean to protect”
- “Still concerned that too many will have a significant impact on the environment - specifically thinking about freedom tourists that are causing waves of disapproval through regional area”
- “Need to increase the number of wealthier tourists that have a greater impact on our economy and decrease the number of 'low end' tourists i.e. freedom campers. They add very little to our economy and have a negative impact on our scenery e.g. leave litter behind, leave toilet waste behind in parking areas etc. Whatever they bring financially to NZ is offset by what we have to spend to clean up after them”
- “Overloading and damage to our environment”

Base: n = 575

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; this view is consistent with previous waves

Themed verbatim reasons for there being **not enough** predicted growth (7%)



Economic growth

- “The more visitors the better for local business”
- “Economy would do better with more sooner”
- “We need more visitors to improve our economy”
- “We can not get enough tourists as the positive result is more income and employment opportunities for our locals”
- “More people means more money comes into the county for businesses to benefit”
- “More visitors. More money spent. More exposure”
- “We need this as a form of international income”
- “Visitors can help to grow our economy we should bring more and more visitors here”
- “Plenty of income to be made!”

Managed growth

- “We could do with more growth if we are prepared for it”
- “Room for more tourists provided infrastructure is improved to accommodate them. Much of New Zealand's natural beauty is not limiting tourist numbers”
- “We are not ready to host that many visitors. We need to expand our roads and all others areas to accommodate them”
- “We have a small population, there is room if properly planed by local councils”
- “Of course we need to be prepared to give tourists a good service and experience and education about how to behave within NZ. But most tourists are well behaved - possibly even better than many Kiwis. Perhaps try and market a more expensive tourism market rather than backpackers who likely spend very little and use a lot more of our (free) tax payer facilities”

Capacity for more

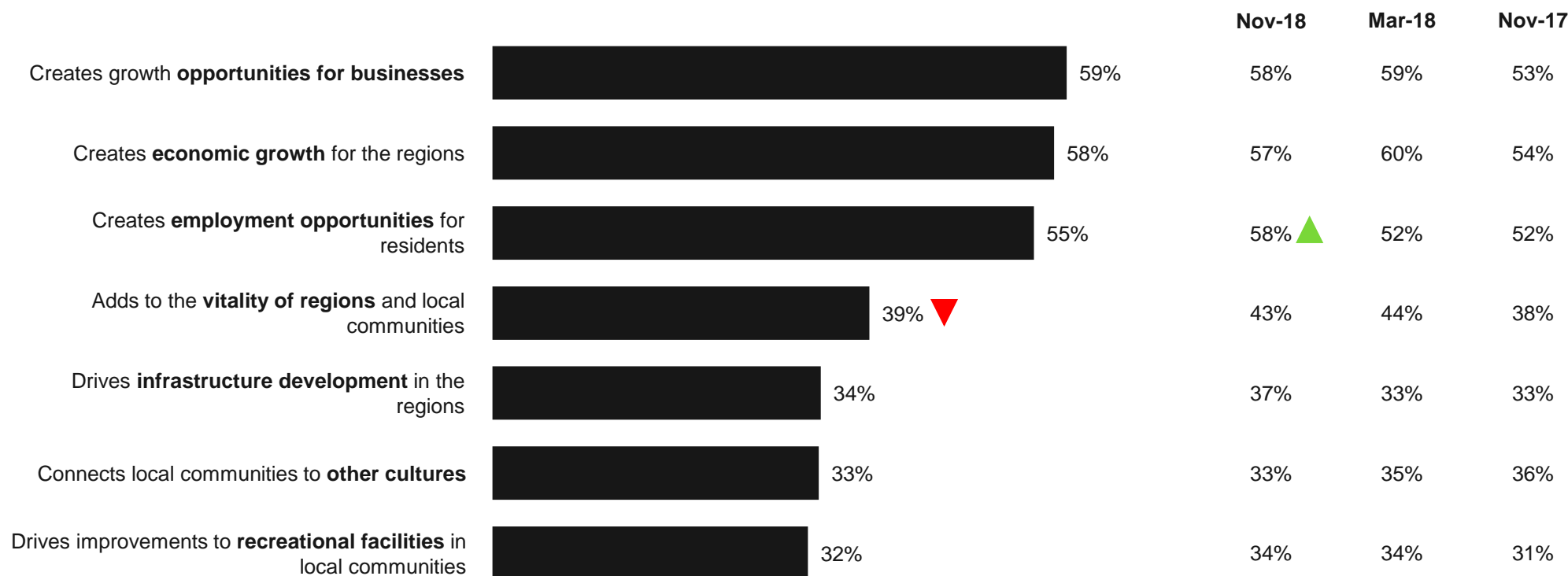
- “We want at least 10 million”
- “More is better”
- “More is great for our country”
- “It will make New Zealand grow. Its people will do better and young folk will be inspired”
- “The more the better”
- “The more the merrier!”
- “We could have more”
- “NZ has a lot to offer with many attractions throughout the country”
- “We need more”
- “We can attract more visitors”
- “Should be more”
- “Plenty of space, plenty of scope”

Base: n = 65

Key perceived benefits of tourism centre around economic benefits and employment; less New Zealanders are convinced that tourism adds vitality to regions and local communities compared to November 2018

Pros of international tourism

% agree, 18+ year olds, Mar-19



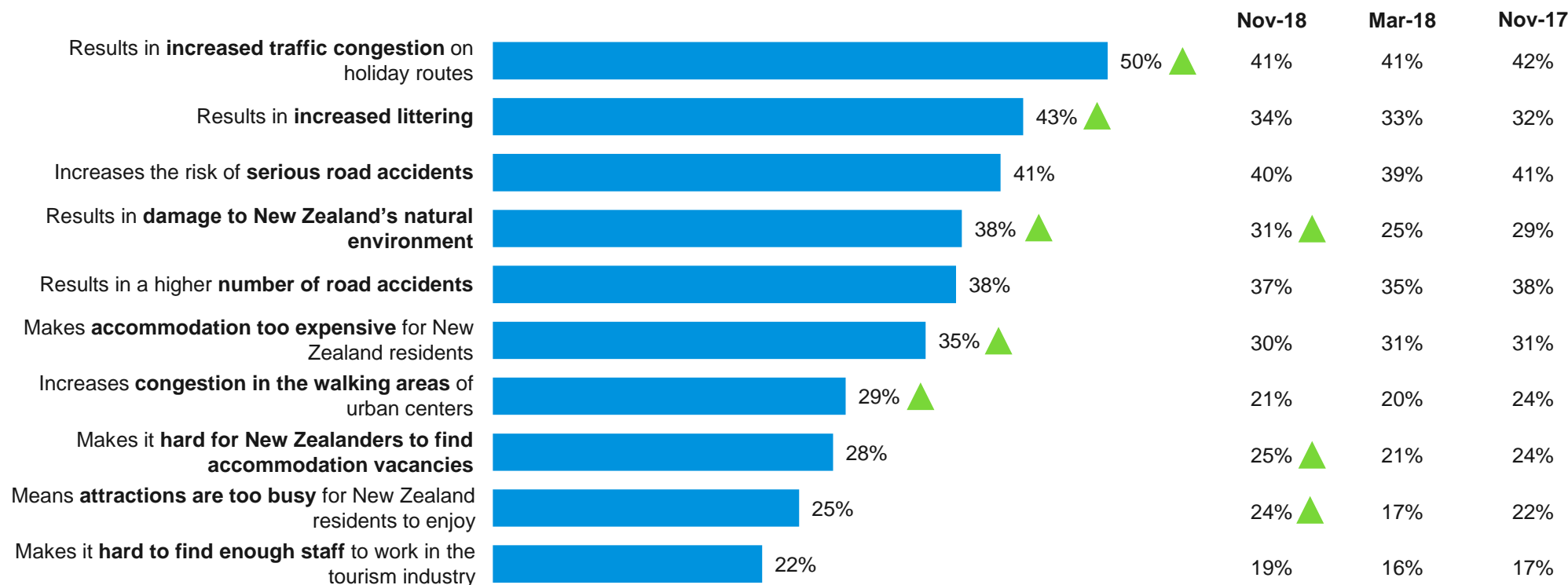
Base: New Zealanders aged 18 plus: Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084; Mar-19 n = 1,083
 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown

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

On the adverse impacts of tourism, significantly more New Zealanders agree that it contributes to traffic congestion, environmental damage, high accommodation prices and urban congestion compared to both November 2018 and a year ago levels

Cons of international tourism

% agree, 18+ year olds, Mar-19



Base: New Zealanders aged 18 plus: Nov-17 n = 501; Mar-18 n = 555; Nov-18 n = 1,084; Mar-19 n = 1,083
 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 Auckland and Wellington having some of the strongest perceptions of benefits from tourism

Pros of international tourism by region

% agree, 18+ year olds, Mar-19

	Northland	Auckland	Bay of Plenty	Gisborne /Hawkes Bay	Taranaki	Manawatu-Whanganui	Wellington	Canterbury	Otago	West Coast
Creates growth opportunities for businesses	52%	64%	54%	55%	46%	51%	67%	47%	62%	54%
Creates employment opportunities for residents	53%	59%	52%	54%	41%	44%	59%	48%	60%	55%
Creates economic growth for the regions	48%	61%	53%	59%	50%	51%	64%	52%	66%	55%
Connects local communities to other cultures	23%	35%	30%	42%	35%	33%	42%	22%	29%	40%
Adds to the vitality of regions and local communities	31%	38%	35%	49%	33%	38%	46%	34%	44%	39%
Drives infrastructure development in the regions	25%	37%	26%	27%	23%	37%	37%	26%	42%	28%
Drives improvements to recreational facilities in local communities	22%	39%	24%	35%	30%	29%	39%	20%	30%	37%
<i>Base n =</i>	100	100	60	101	101	80	101	149	151	100

Heat map shading is across rows

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; this is consistent with November 2018

Cons of international tourism by region

% agree, 18+ year olds, Mar-19

	Northland	Auckland	Bay of Plenty	Gisborne /Hawkes Bay	Taranaki	Manawatu-Whanganui	Wellington	Canterbury	Otago	West Coast
Results in increased traffic congestion on holiday routes	54%	48%	38%	46%	50%	45%	43%	59%	71%	56%
Increases the risk of serious road accidents	39%	38%	30%	41%	42%	48%	36%	45%	69%	59%
Makes accommodation too expensive for New Zealand residents	36%	38%	18%	33%	29%	31%	21%	41%	51%	37%
Results in increased littering	42%	46%	36%	39%	39%	34%	40%	48%	51%	57%
Results in a higher number of road accidents	36%	34%	22%	28%	31%	44%	32%	42%	63%	44%
Increases congestion in the walking areas of urban centres	22%	38%	17%	18%	18%	24%	23%	34%	50%	25%
Results in damage to New Zealand's natural environment	35%	36%	33%	39%	33%	33%	35%	41%	54%	41%
Makes it hard to find enough staff to work in the tourism industry	22%	24%	8%	19%	14%	22%	12%	25%	55%	22%
Makes it hard for New Zealand residents to find accommodation vacancies	22%	28%	15%	26%	23%	24%	20%	36%	46%	27%
Means attractions are too busy for New Zealand residents to enjoy	19%	31%	17%	14%	20%	21%	20%	30%	39%	24%

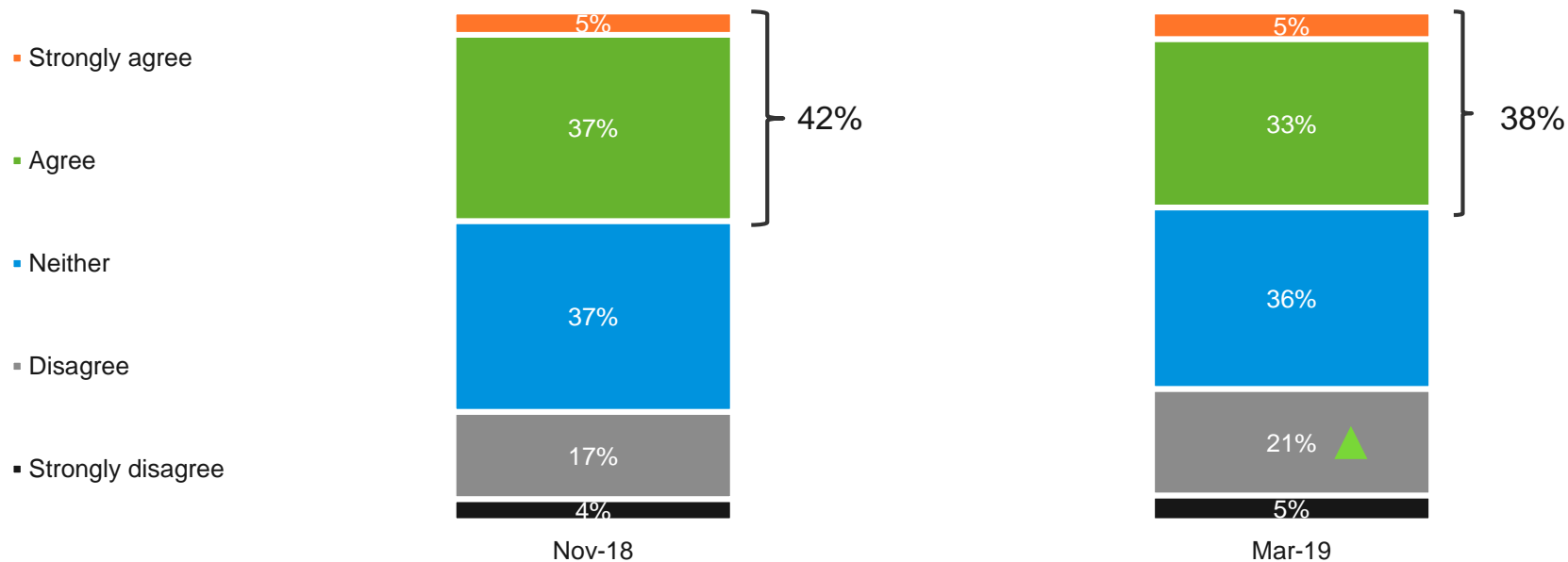
Base n = 100 100 60 101 101 80 101 149 151 100



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, around 26% do not believe that, up from 21% in November 2018

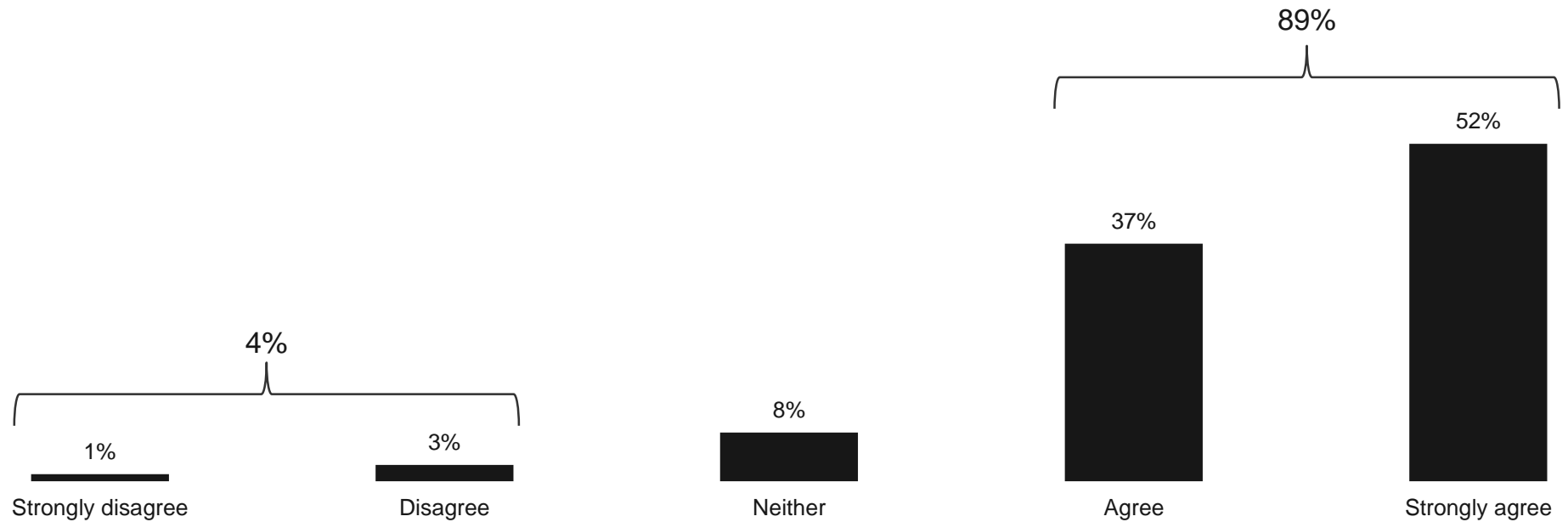
Agreement that action is being taken to address the pressures of tourism growth
 % 18+ year olds, Mar-19



Base: New Zealanders aged 18 plus: Nov-18 n = 1,084; Mar-19 n = 1,083

The overwhelming majority of New Zealanders believe that the initiatives such as Tiaki are important in helping inform people on how to travel responsibly in New Zealand

Believe that an initiatives such as Tiaki are important
% 18+ year olds, Mar-19



Base: New Zealanders aged 18 plus: Mar-19 n = 1,083

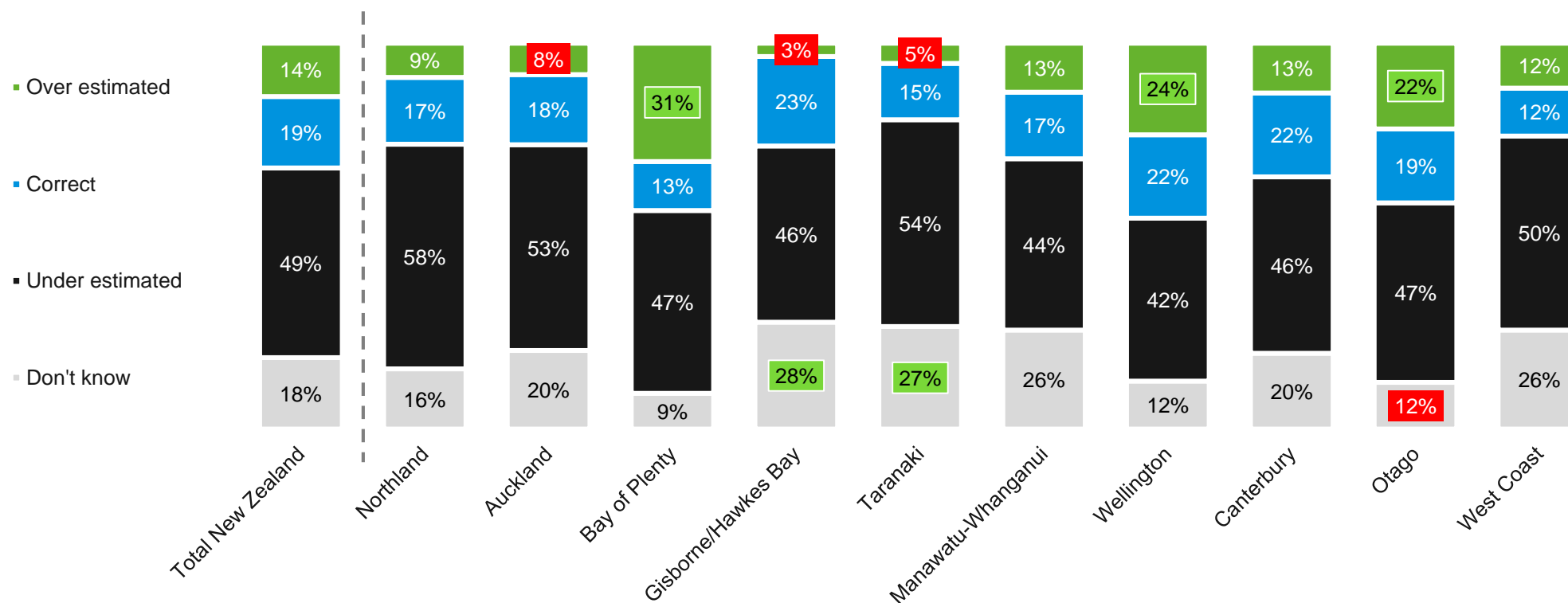
4

Appendix: measures by region

Bay of Plenty, Wellington and Otago residents are more likely to overestimate annual visitor numbers

Knowledge of annual visitor numbers – by region

%, Mar-19

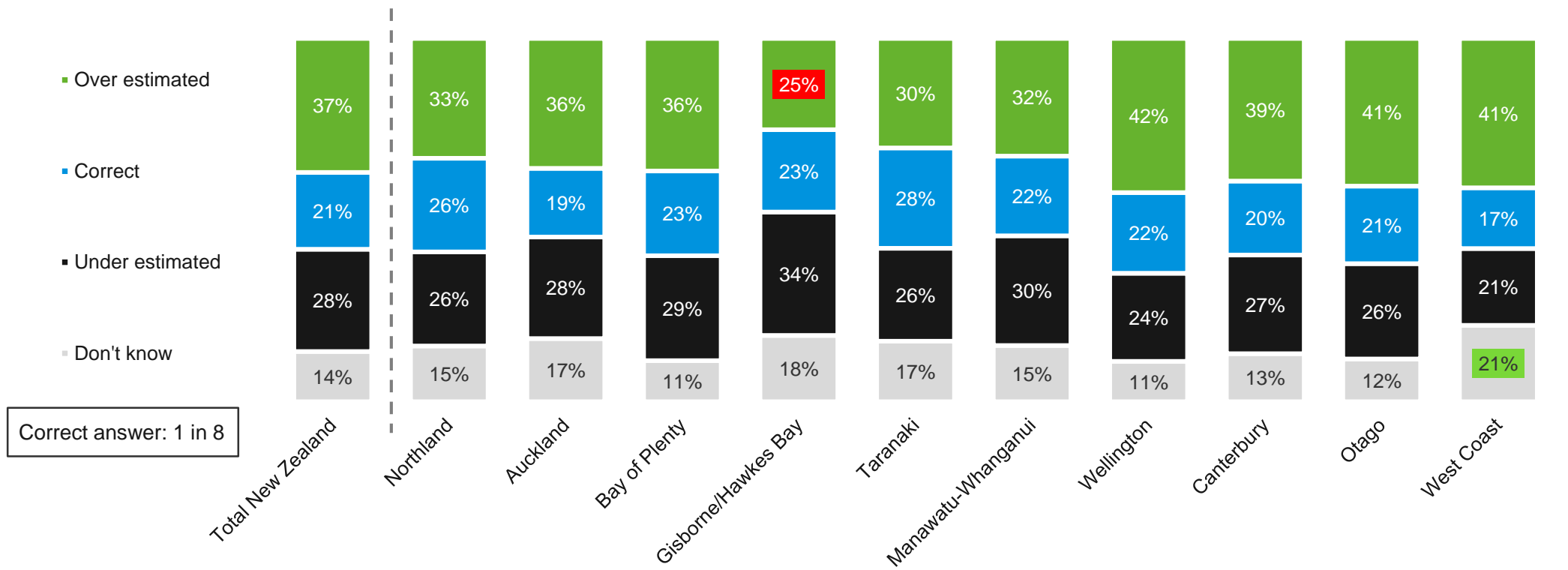


Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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
%, Mar-19



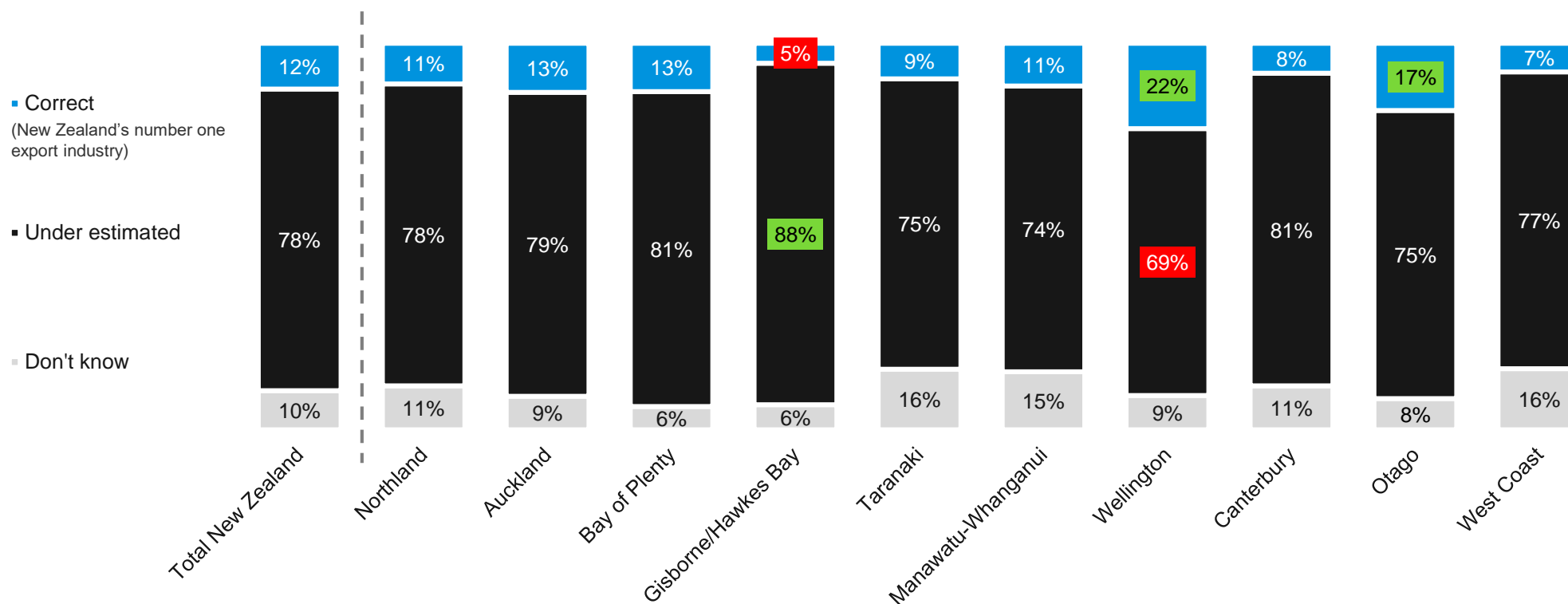
Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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

Wellington has the highest proportion of residents who are aware of the value of tourism, however this is still relatively low at 22%

Knowledge of the value of the tourism industry – by region

%, Mar-19

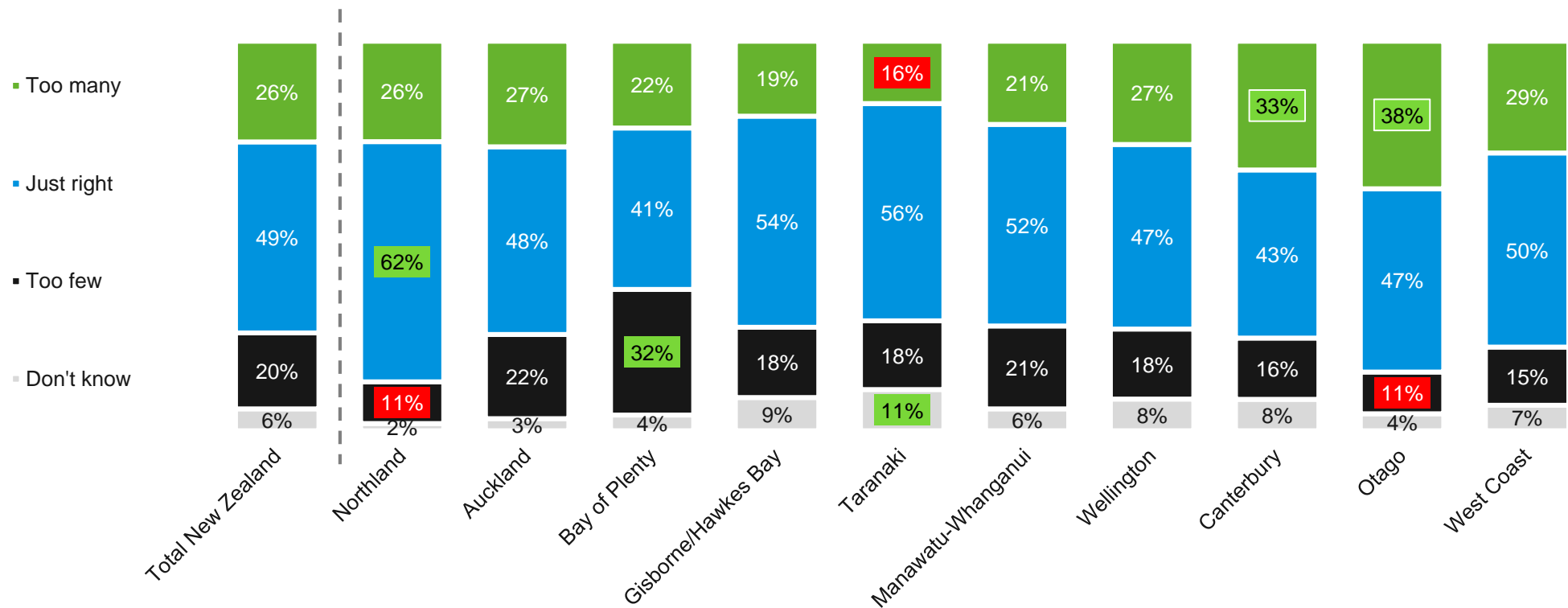


Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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

Otago and Canterbury 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
%, Mar-19



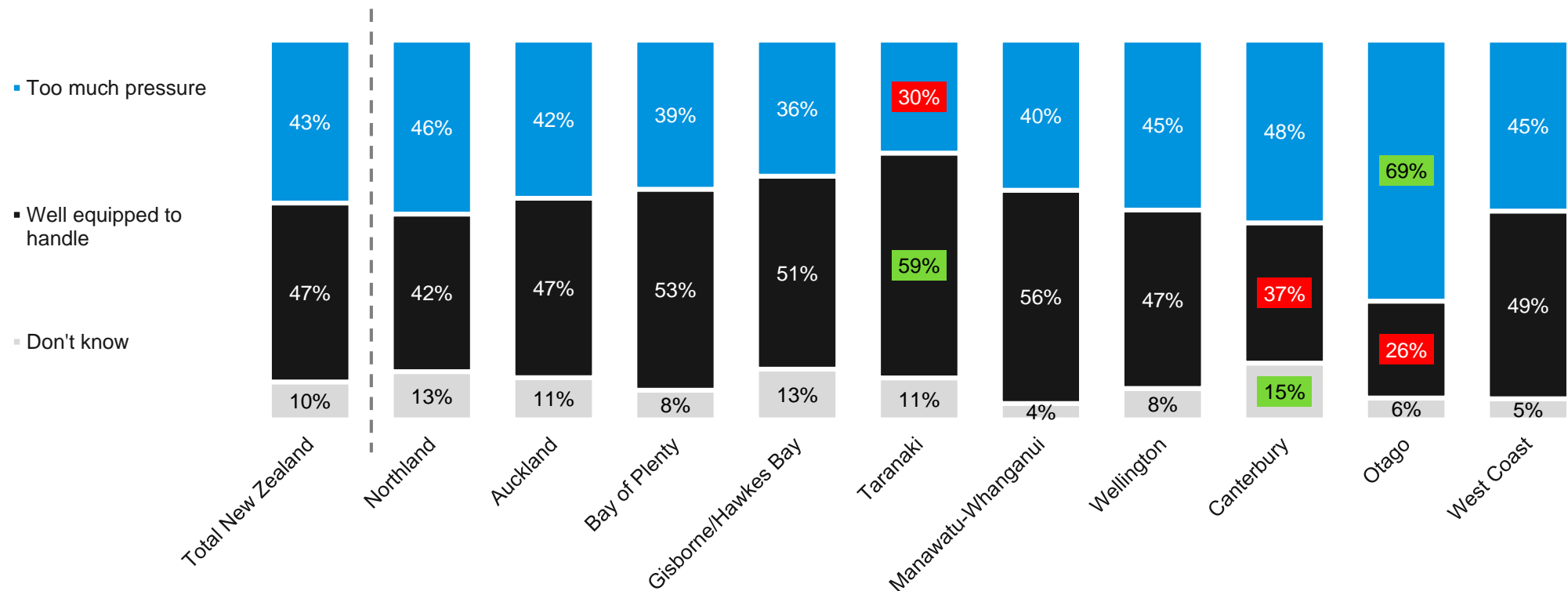
Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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

Otago residents are the most likely to think that there is too much pressure from international visitors

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

%, Mar-19

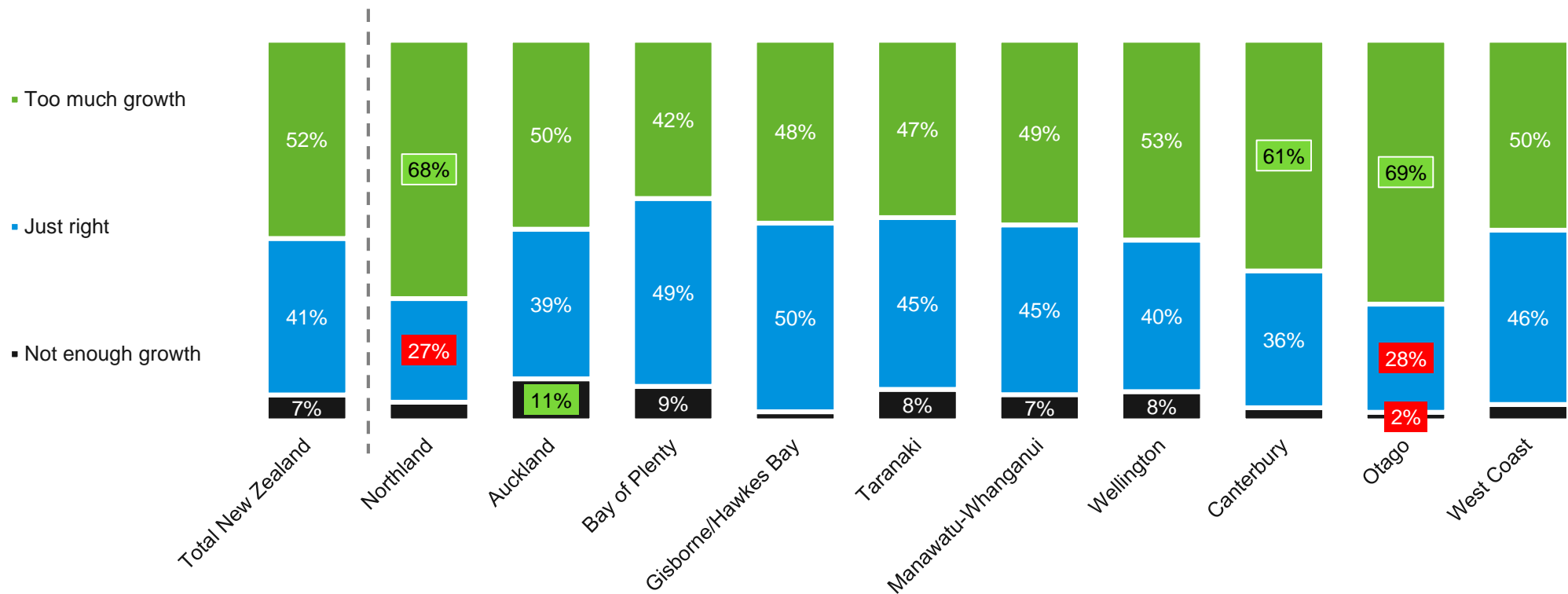


Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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

Otago, Northland and Canterbury residents are more likely to think that the predicted growth is too much

Attitudes towards predicted future growth of annual international visitors – by region
%, Mar-19



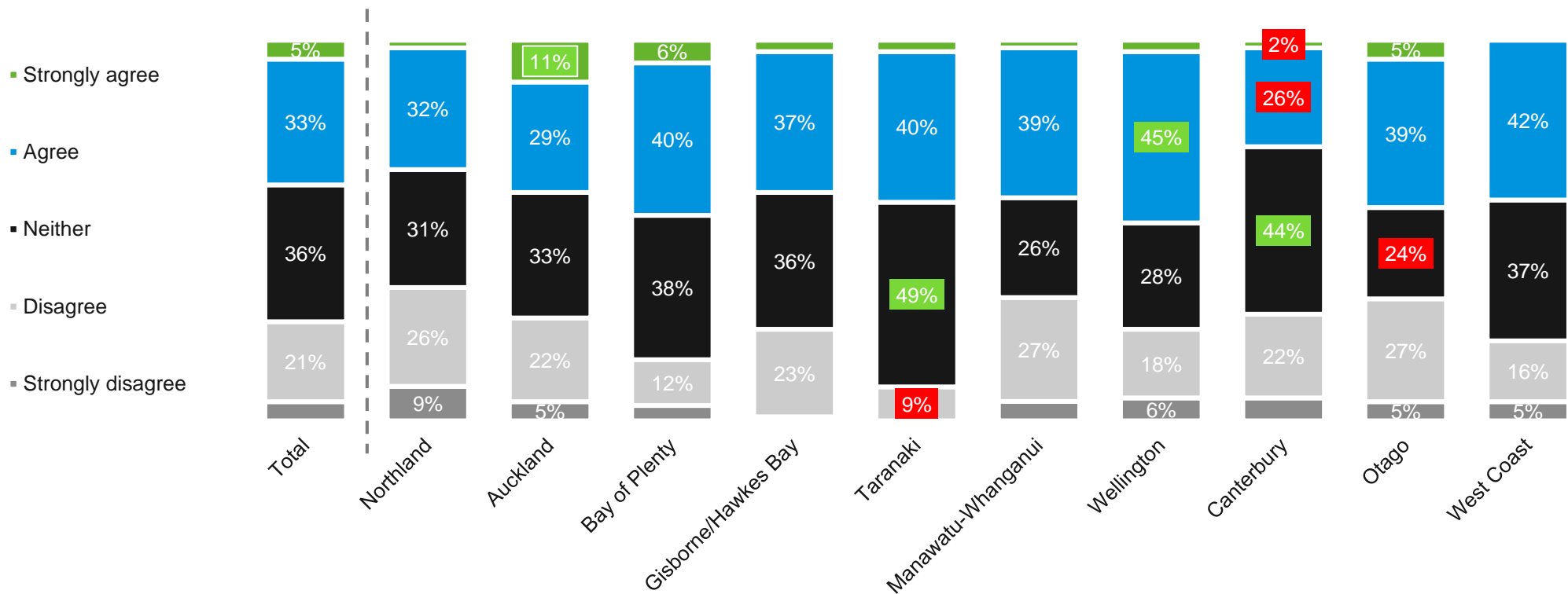
Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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

Canterbury residents have the lowest level of agreement that action is being taken to address the pressures of tourism growth

Agreement that action is being taken to address the pressures of tourism growth

% 18+ year olds, Mar-19

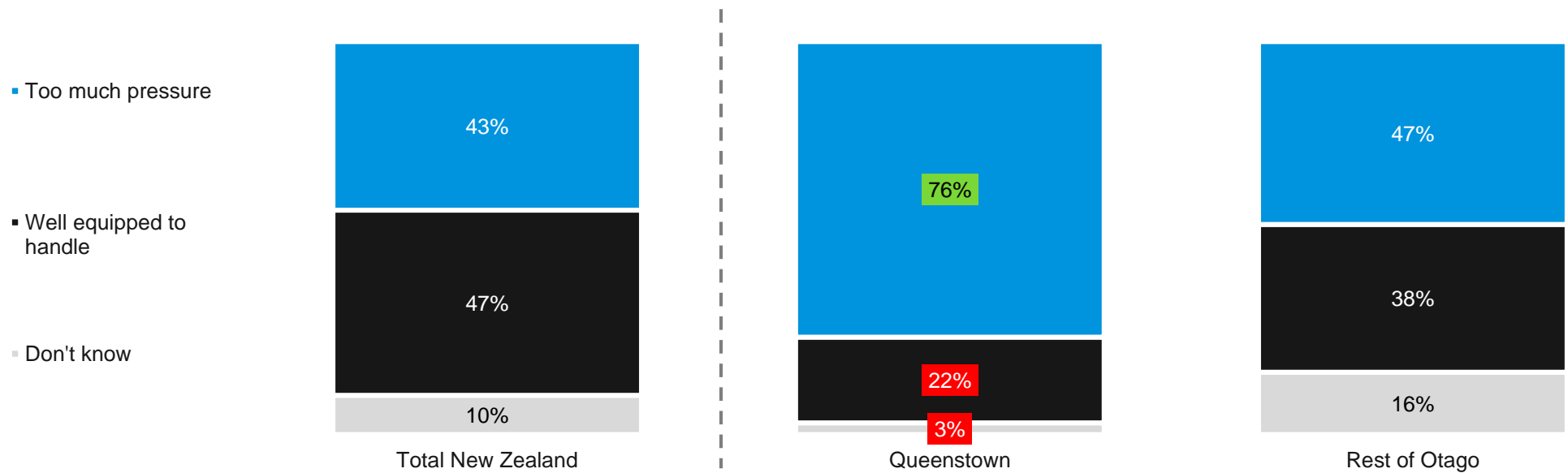


Base: Total NZ n = 1,083, Northland n = 100, Auckland n = 100, Bay of plenty n = 60, Gisborne/Hawkes Bay n = 101, Taranaki n = 101, Manawatu-Whanganui n = 80, Wellington n = 101, Canterbury n = 149, Otago n = 151, West Coast n = 100

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

Queenstown residents are more likely to think that there is too much pressure from international visitors compared to the rest of Otago

Perceptions of the pressure that tourists put on New Zealand – by region
%, Mar-19



Base: Total NZ n = 1,083, Queenstown n = 101, Rest of Otago n = 50

Queenstown significantly higher / lower than rest of Otago at 95%