

# Mood of the Nation

## New Zealanders' perceptions of international tourism

December 2017



# Contents

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## 1

Background and approach 3

---

## 2

Key insights 6

---

---

## 3

Detailed insights 10

---

## 4

Appendix: measures by region 32

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# 1

## Background and approach

# Background



Tourism 2025 aims to increase the value of tourism to \$41 billion by 2025 with a focus on building value rather than volume



Tourism 2025 identifies visitor experience as a priority area to help grow value. An essential aspect of a unique and pleasurable visitor experience is interaction with local communities



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



This has been accompanied by some negative sentiment and broad media coverage on foreign drivers and road accidents, 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:

	Wave 1 (Dec-15)	Wave 2 (Mar-16)	Wave 3 (Nov-16)	Wave 4 (Mar-17)	Wave 5 (Nov-17)
Auckland city	83	100	81	87	80
Wellington city	61	80	81	80	80
Rotorua	40	50	48	51	50
Christchurch	75	80	80	85	81
Queenstown	17	51	54	50	50



## 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

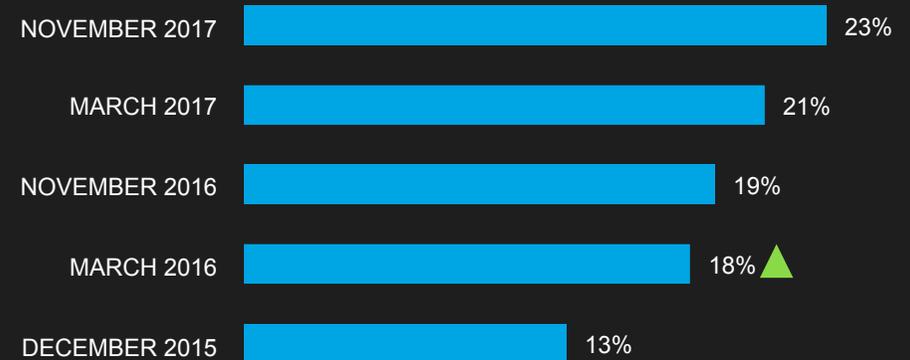
## Key insights

# KEY INSIGHTS (page 1 of 3)

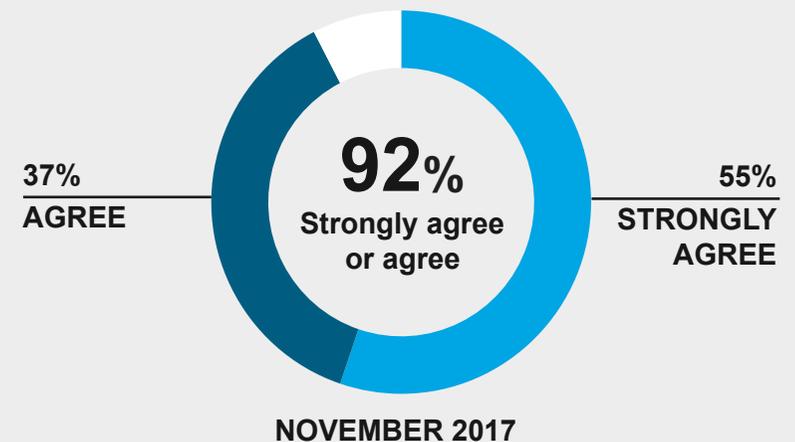


- While the prevailing view is that New Zealand attracts just the right number of international visitors, the proportion of people who believe that New Zealand attracts too many visitors continues to trend upwards (they are however still in the minority)
- Nine in ten New Zealanders agree that international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

## PERCEPTIONS THAT CURRENT NUMBER OF VISITORS IS TOO HIGH



## IS INTERNATIONAL TOURISM GOOD FOR NEW ZEALAND?

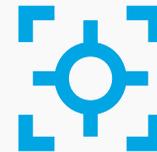
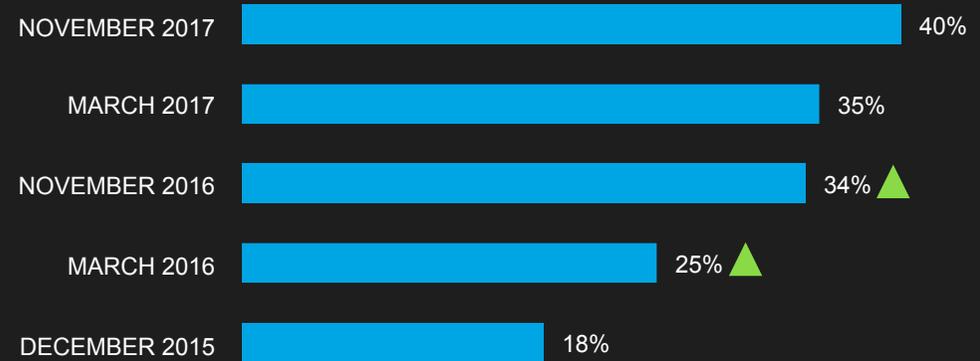


# KEY INSIGHTS (page 2 of 3)



- 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



### Top 6 ways tourism applies pressure

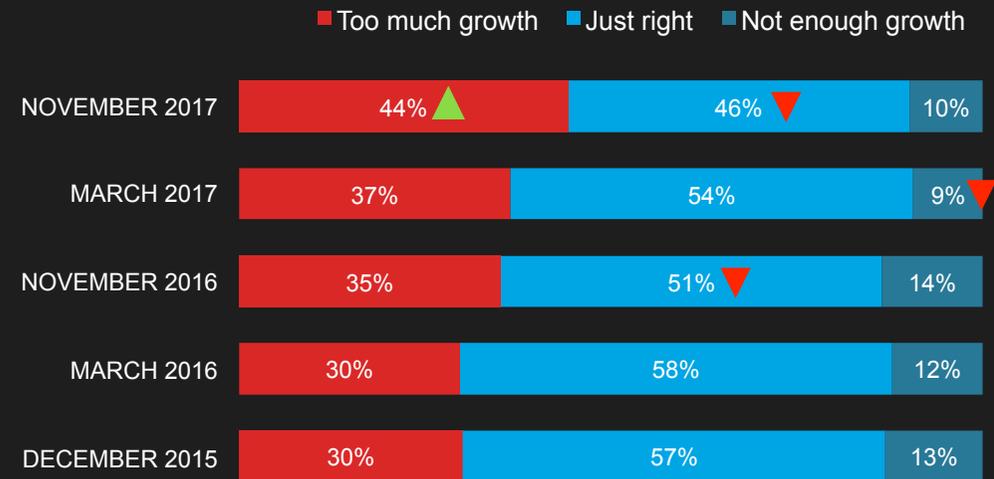
- Pressure on infrastructure
- Accommodation shortage
- Environmental damage
- Increased traffic congestion
- Overcrowding
- Freedom camping

# KEY INSIGHTS (page 3 of 3)



- The proportion of New Zealanders that believe the predicted international visitor growth is too much has significantly increased

## PERCEPTIONS OF PREDICTED GROWTH



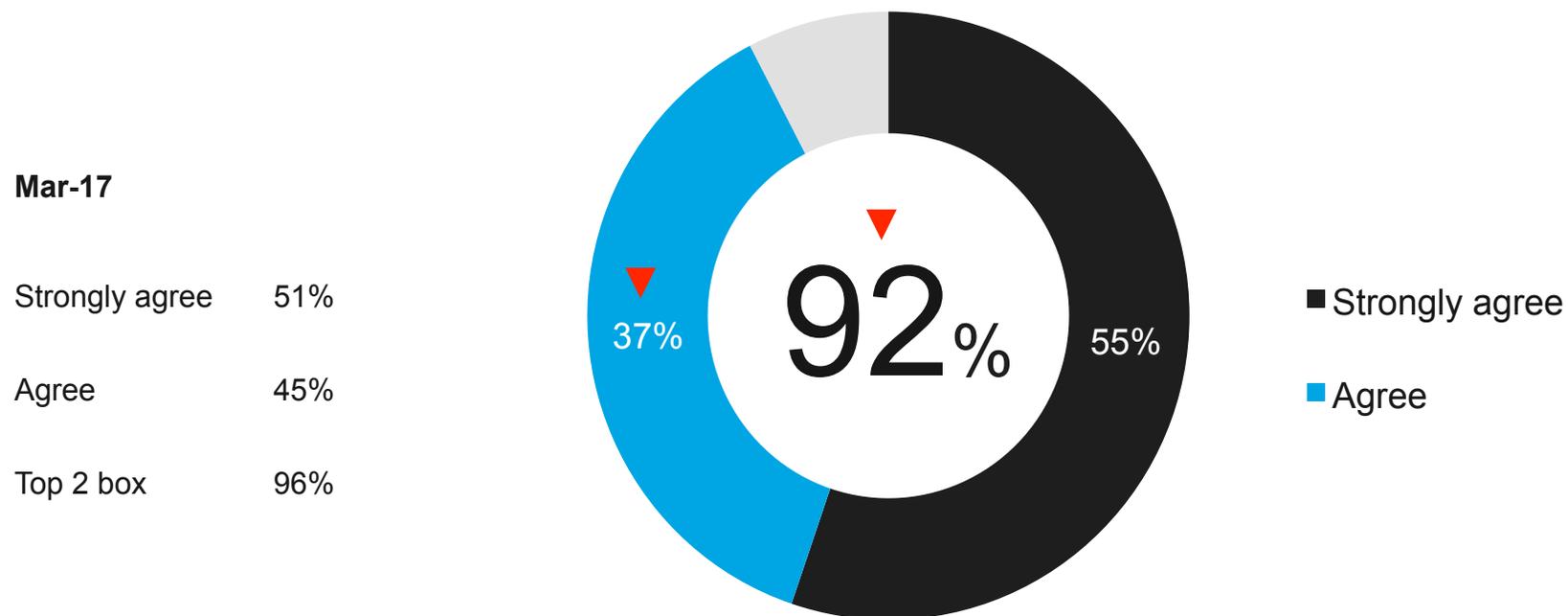
# 3

## 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



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

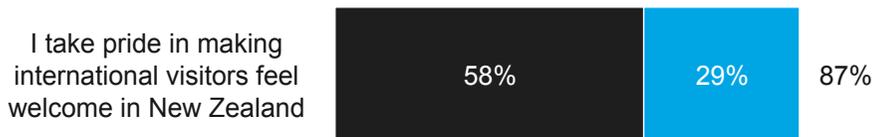
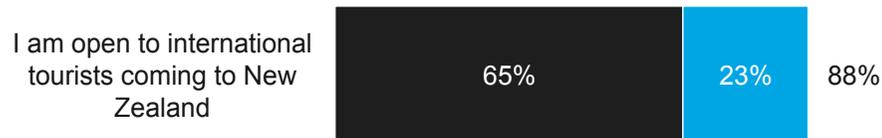
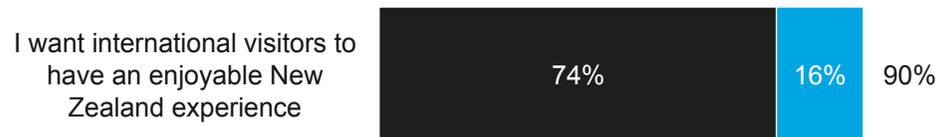
Base: New Zealanders aged 18 plus Nov-17 n = 501

# 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

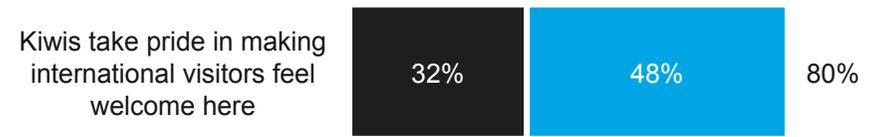
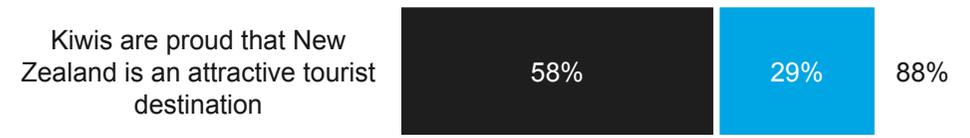
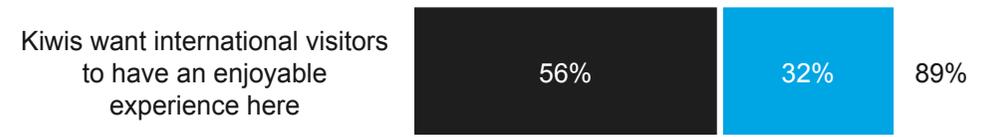
% agree, 18+ year olds, Nov-17

### Personal perceptions



■ Strongly agree ■ Somewhat agree

### Perceptions of how other New Zealanders feel



This question has not been previously asked

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

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

## What influences the opinions on international tourism

18+ year olds, Nov-17

		<u>Level of influence</u>	
		1 <sup>st</sup> most significant	2 <sup>nd</sup> most significant
1	What I experience first-hand in my daily life	40%	22%
2	What I see / hear about tourism from national media outlets	36%	14%
3	What I hear from friends / family / colleagues that they experience first hand in their daily lives	14%	38%
4	What I see / hear about tourism from regional media outlets	5%	13%
5	What I see / hear about tourism from local media outlets	4%	13%

This question has not been previously asked

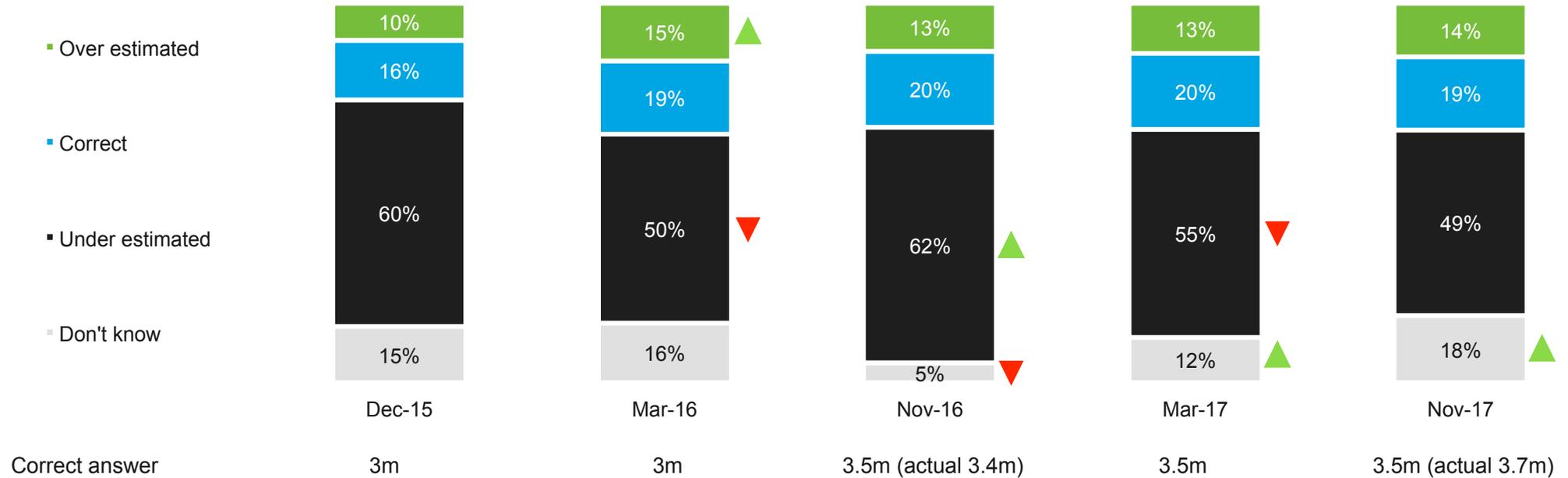
Base: New Zealanders aged 18 plus Nov-17 n = 501

# 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

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



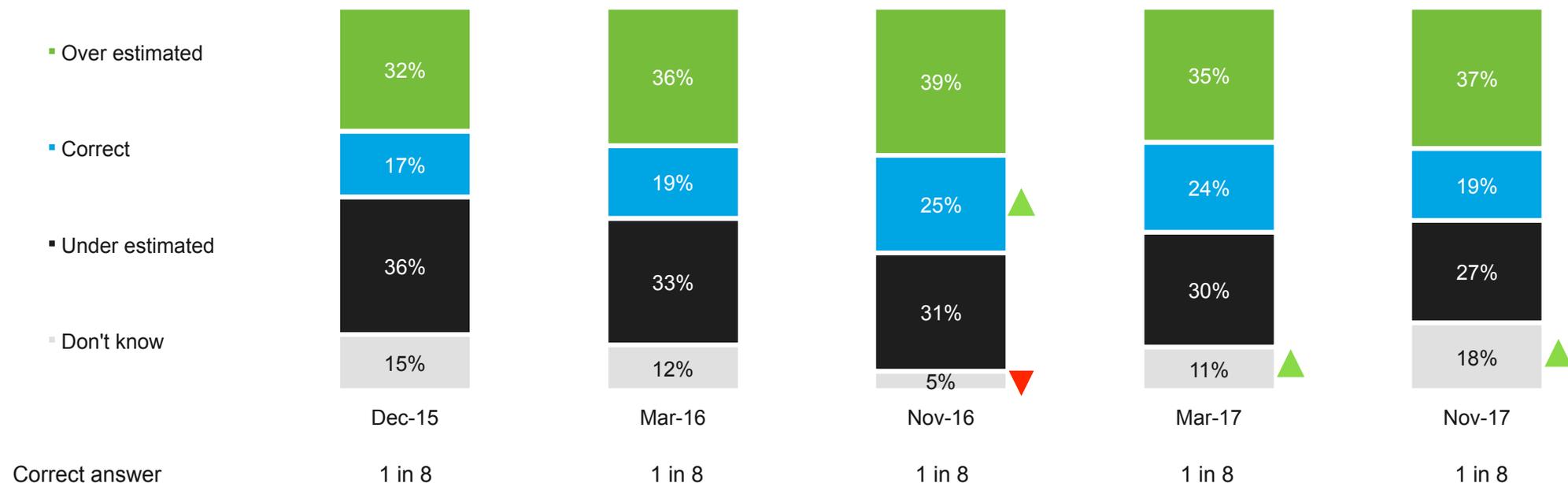
Base: New Zealanders aged 18 plus Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501

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

# 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



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

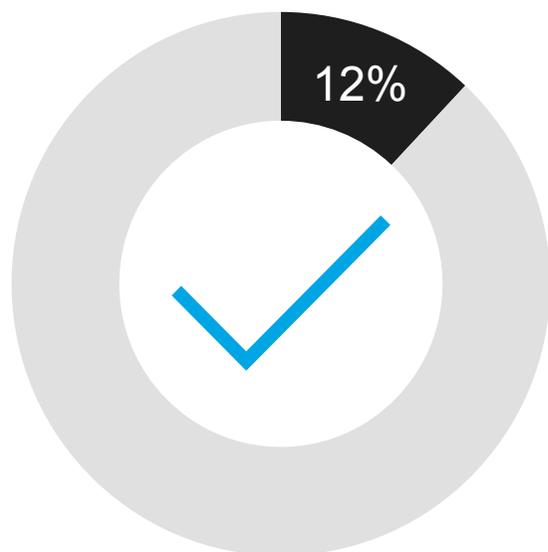
▲ ▼ Significantly higher / lower than previous wave at 95% CL

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

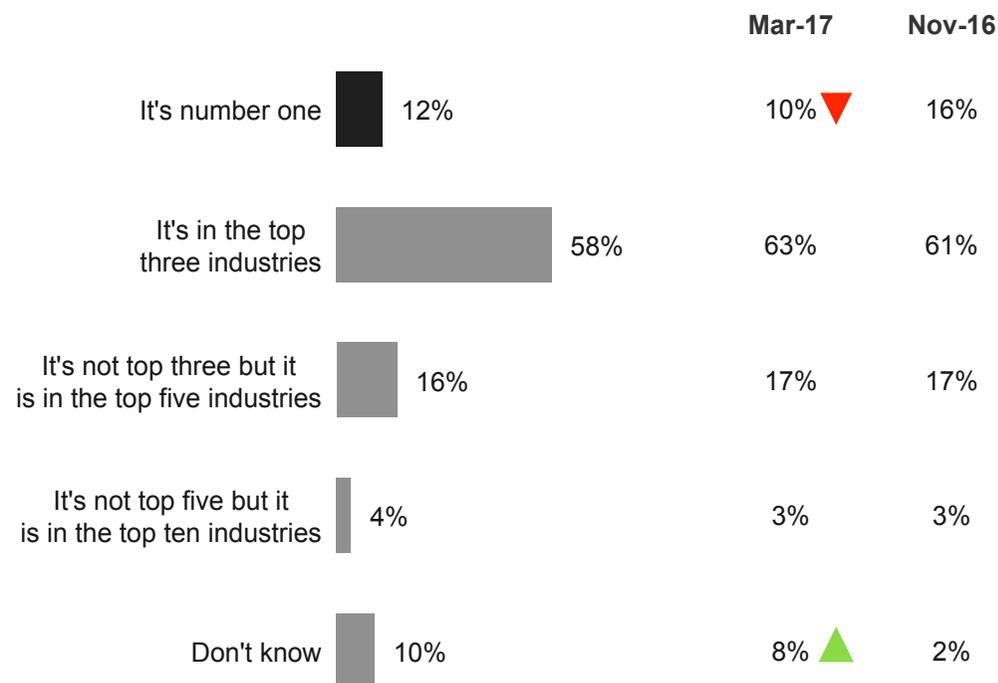
%, 18+ year olds, Nov-17

### It's number one



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

### Compared to previous waves



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

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

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:



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



Don't know
  Too few
  Just right
  Too many

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

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

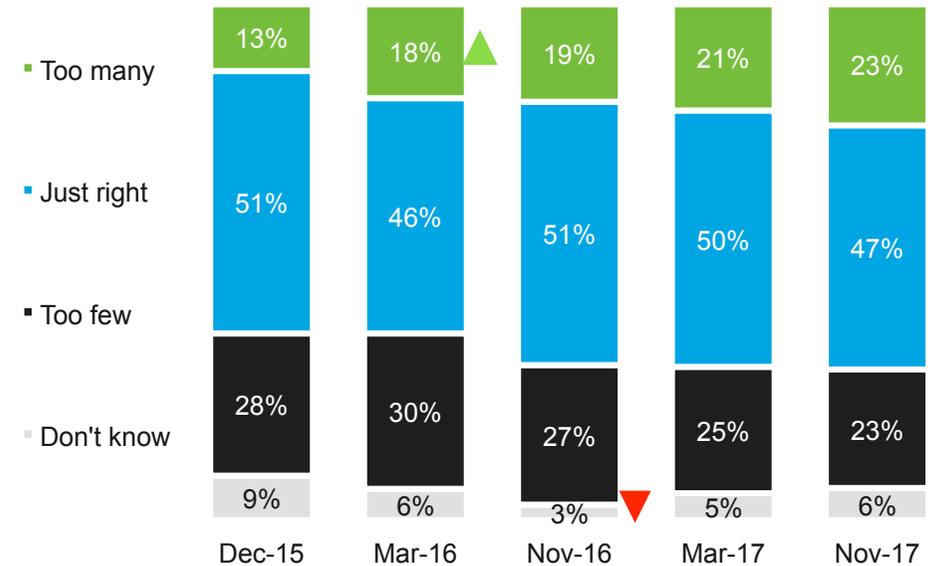
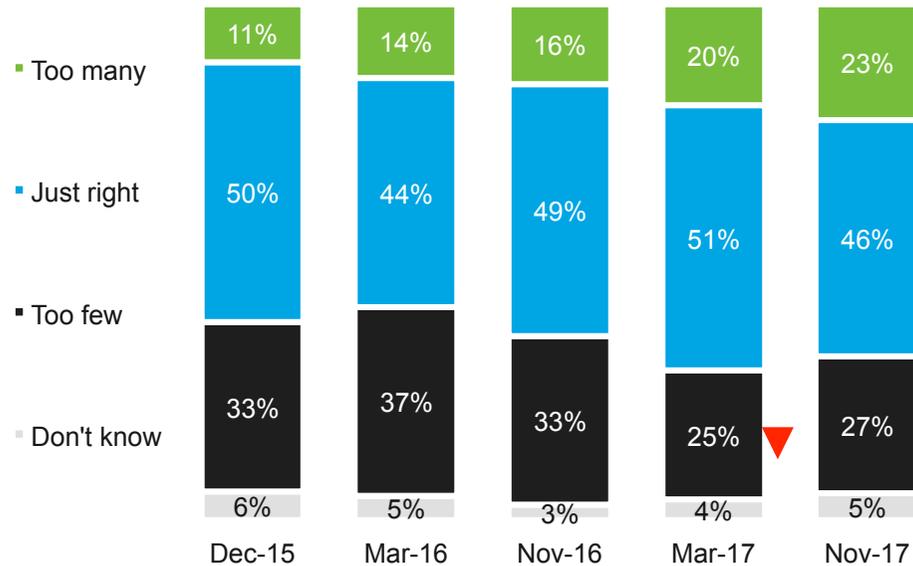
# While still in the minority, the proportion of New Zealanders who think that New Zealand attracts too many international visitors continues to increase

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

%, 18+ year olds

Based on **perceived** number of current visitors

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

▲ ▼ 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%)**



## Lack of infrastructure

- “Our infrastructure was not prepared well, and the environment is being harmed”
- “Our infrastructure is insufficiently developed to support large numbers of visitors”
- “We don't have the infrastructure to absorb the number of tourists, especially in national parks”
- “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 wont assist us on the international stage”
- “At present we are not equipped with roading, facilities”
- “Infrastructure, e.g. accommodation is hard to cope”
- “Because I do not think there is enough accommodation at the moment”

## Overcrowding

- “Because our hotspots e.g. Queenstown, Auckland etc are very crowded with tourists”
- “Overcrowding in tourist destinations”
- “Because when I go to enjoy some of New Zealand's nice spots there are always tourists there!”
- “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”
- “some areas are particularly congested in relation to tourism, which makes it difficult for national tourists”
- “Some places can be swamped with tourists at times”

## Impact on domestic market

- “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”
- “Tourist attractions becoming too crowded, dangers on the road, accommodation in places like Queenstown expensive for average kiwi now”
- “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”
- “Drags the price up on tourist areas. It's getting expensive for local people to visit them”
- “Personal observations in Northland and the fact we as locals have to pay tourist prices for many things”

Base: n = 100

# 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%)



## Economic benefits

- “Tourist bring money into the country to spend which creates jobs”
- “Tourists are great for NZ. They spend a lot of money, create jobs, no crime and make us a diverse community”
- “There should be more to help the economy”
- “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”
- “We need more travellers to visit NZ so it boosts the economy”
- “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”
- “I think we could do with more tourism, to boost employment and add money to the economy”
- “Supports businesses in the tourism industry for growth of economy”

## Managed expansion

- “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”
- “We have the capacity to expand to meet more tourist demand - just not too quickly”
- “I'm sure we could handle more - in certain places”
- “I think we could do a little bit better in off-peak times and also smaller towns etc”
- “I think there is room for more visitors - especially in Central Otago, not just Queenstown”
- “So much potential as long as it is managed correctly”
- “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”

## Showcase New Zealand

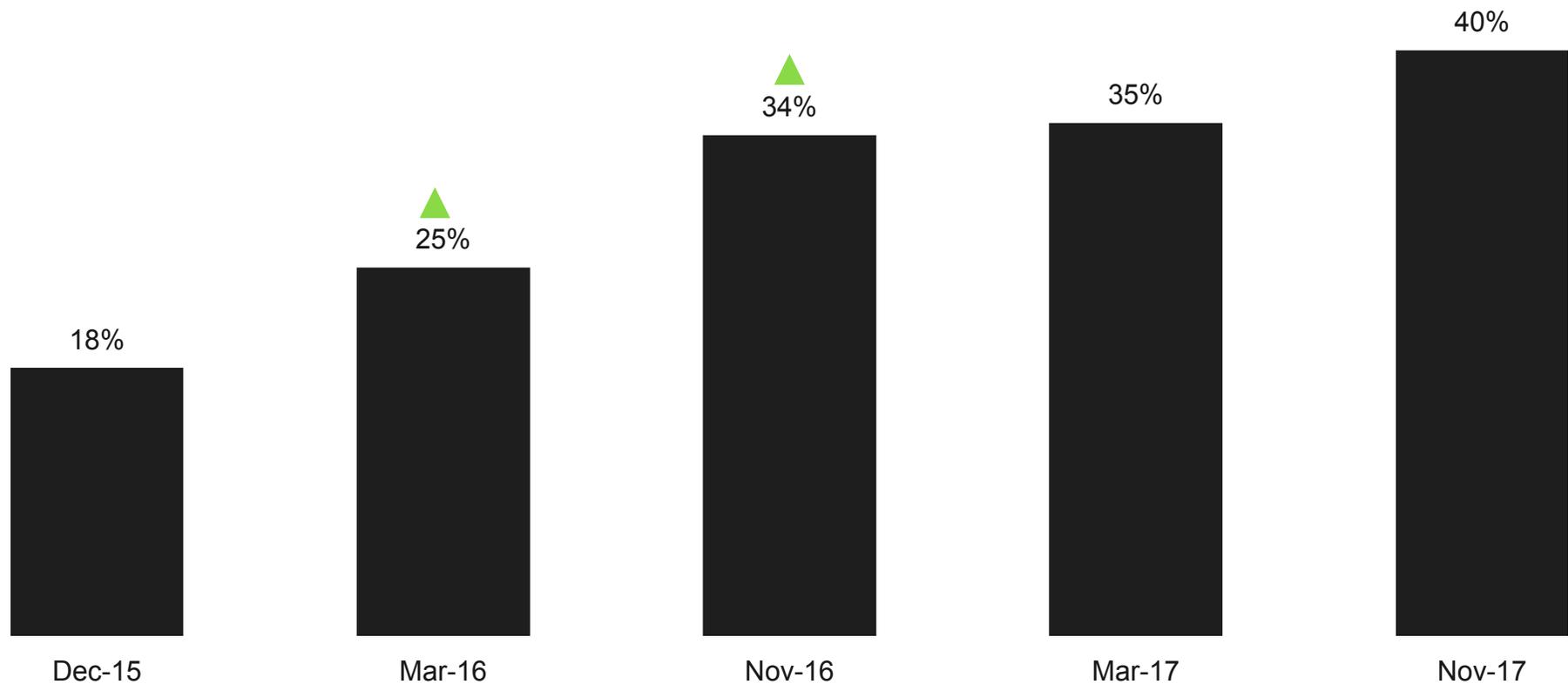
- “I want people to see our beautiful country”
- “Because NZ is a great place and I think the world needs to know this. Our scenery is some of the best in the world”
- International sporting events and movie fans attract lots of international tourists as do nature lovers looking at clean green New Zealand”
- “We are an underpopulated country and the experience is unique”
- “NZ is a great country for travel”
- “Like as many people as possible to visit and experience NZ”

Base: n = 139

# 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

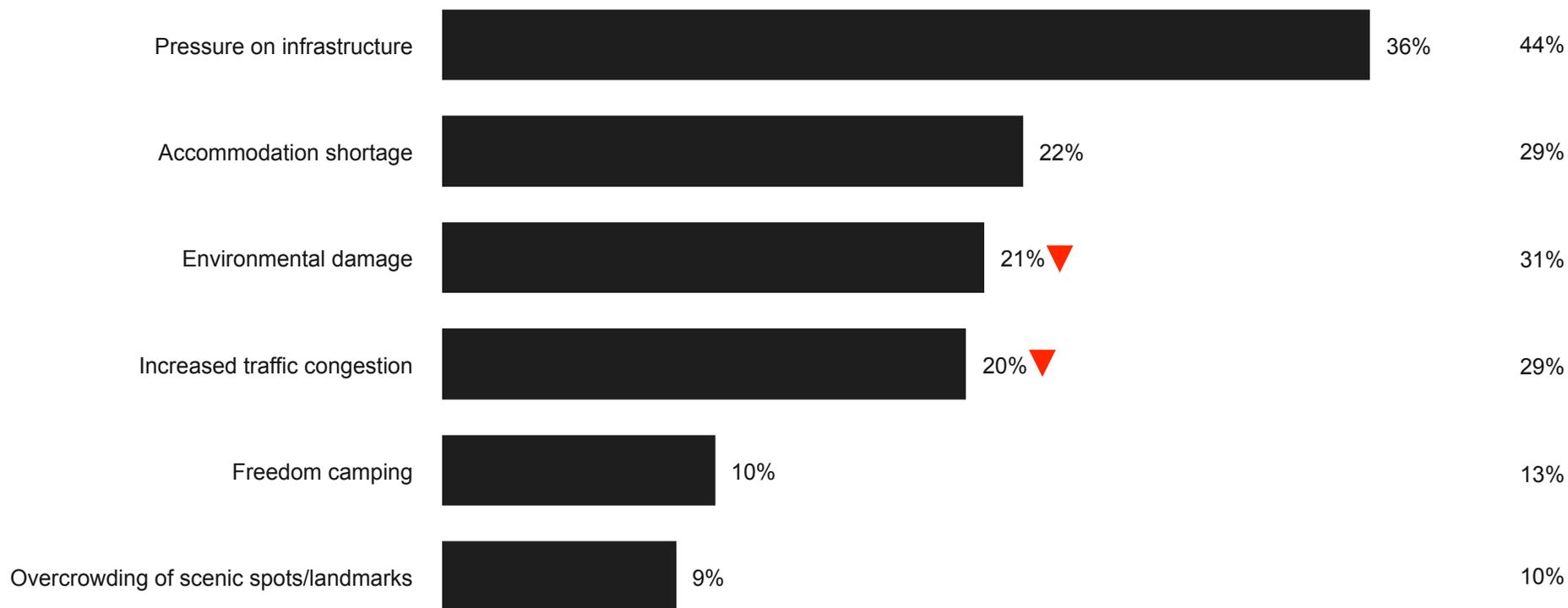
  Significantly higher / lower than previous wave at 95% CL

# 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

%, those who say "too much pressure", Nov-17

Mar-17



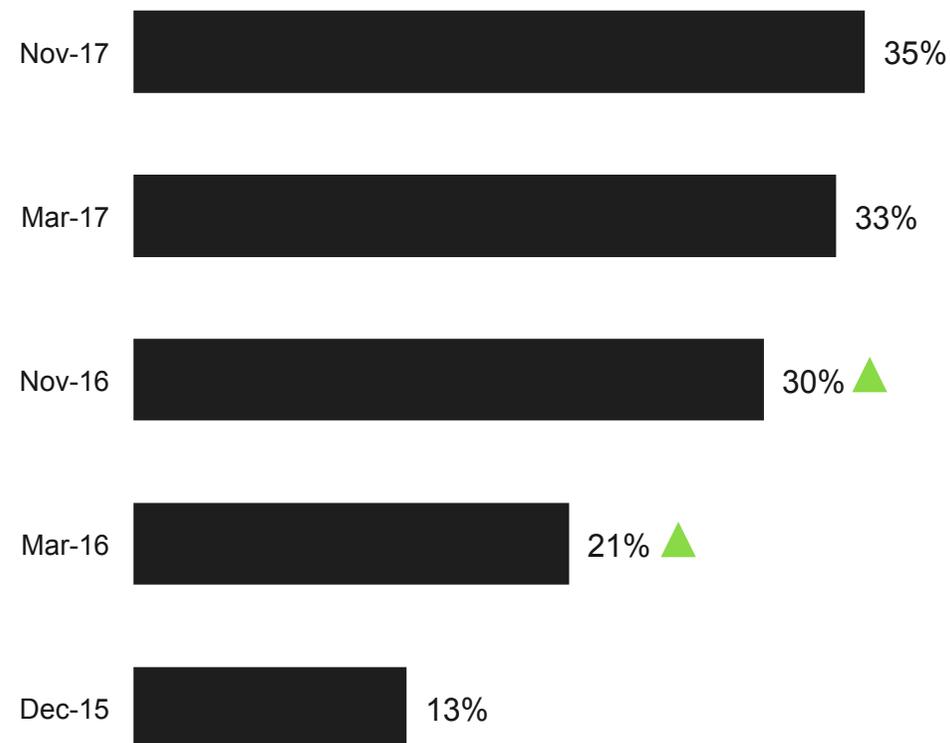
Base: Those who say "too much pressure" Nov-17 n = 190  
 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown

▲ ▼ Significantly higher / lower than Mar-17 at 95% CL

# 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

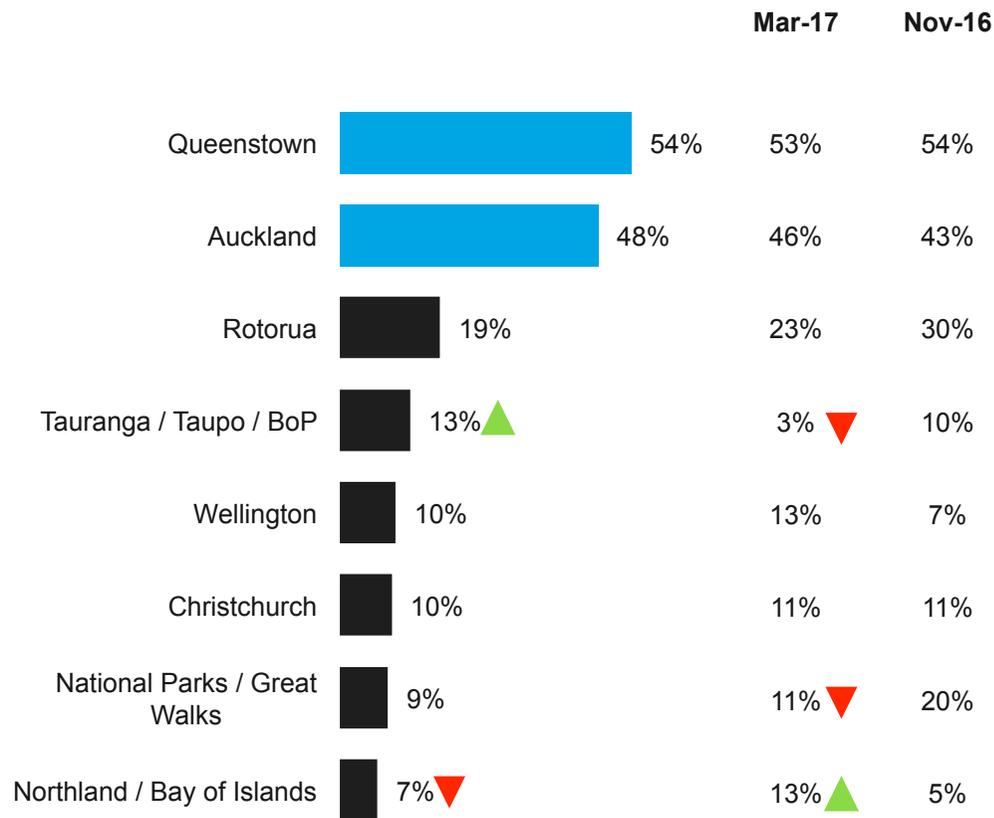
## “Some places are under more pressure”

% agree, 18+ year olds, Nov-17



## Which places?

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

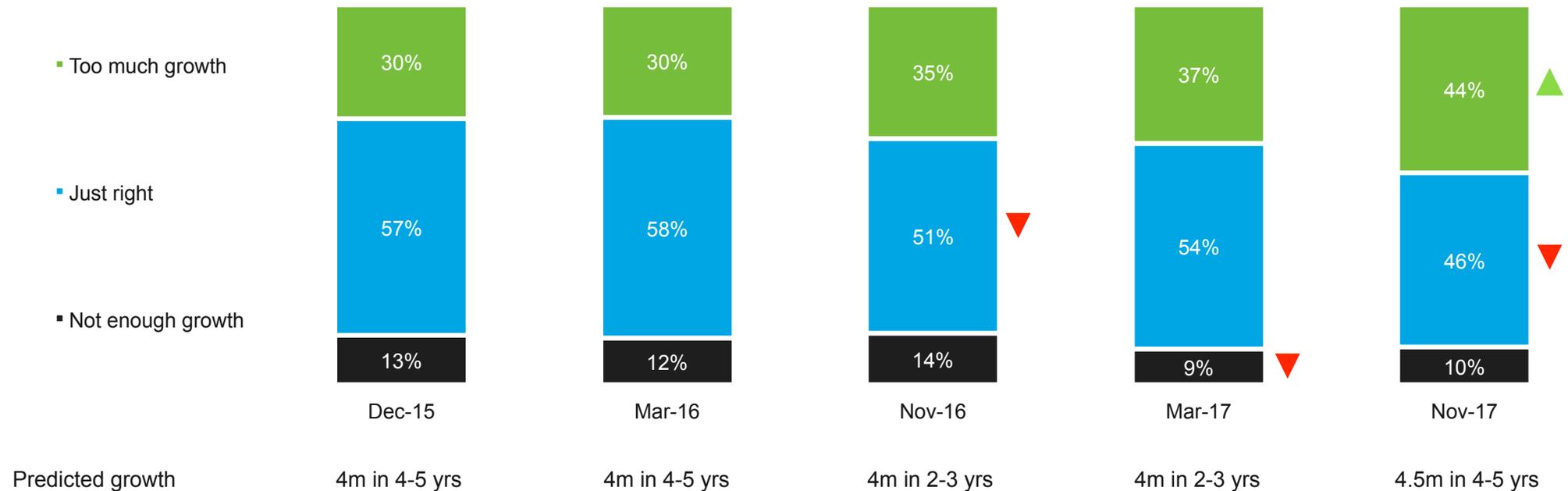


Base: New Zealanders aged 18 plus Dec-15 n = 502; Mar-16 n = 520; Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501

▲ ▼ 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



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

# 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

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

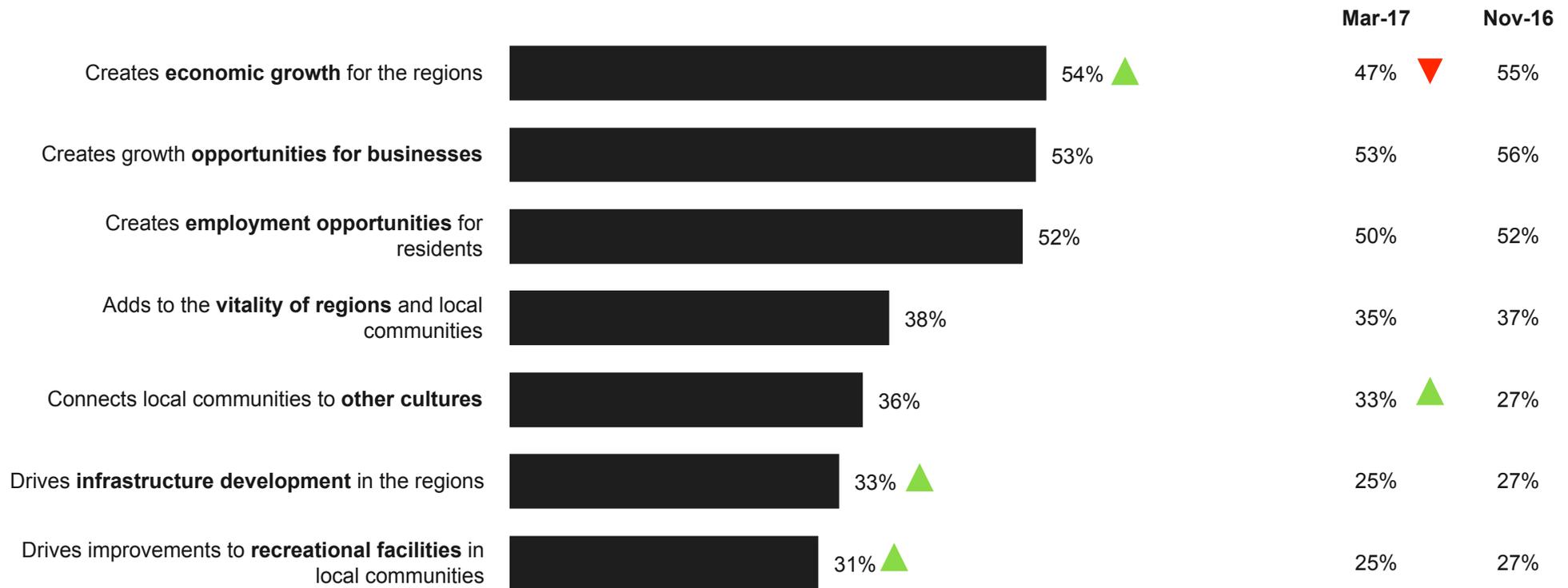
- “We have much more spaces for more tourists”
- “I still think we can accommodate more tourists”
- “Smaller countries than ours host many more visitors each year”
- “There is more capacity available outside the main current tourist areas”
- “Plenty of scope to welcome more if dispersed seasonally and 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



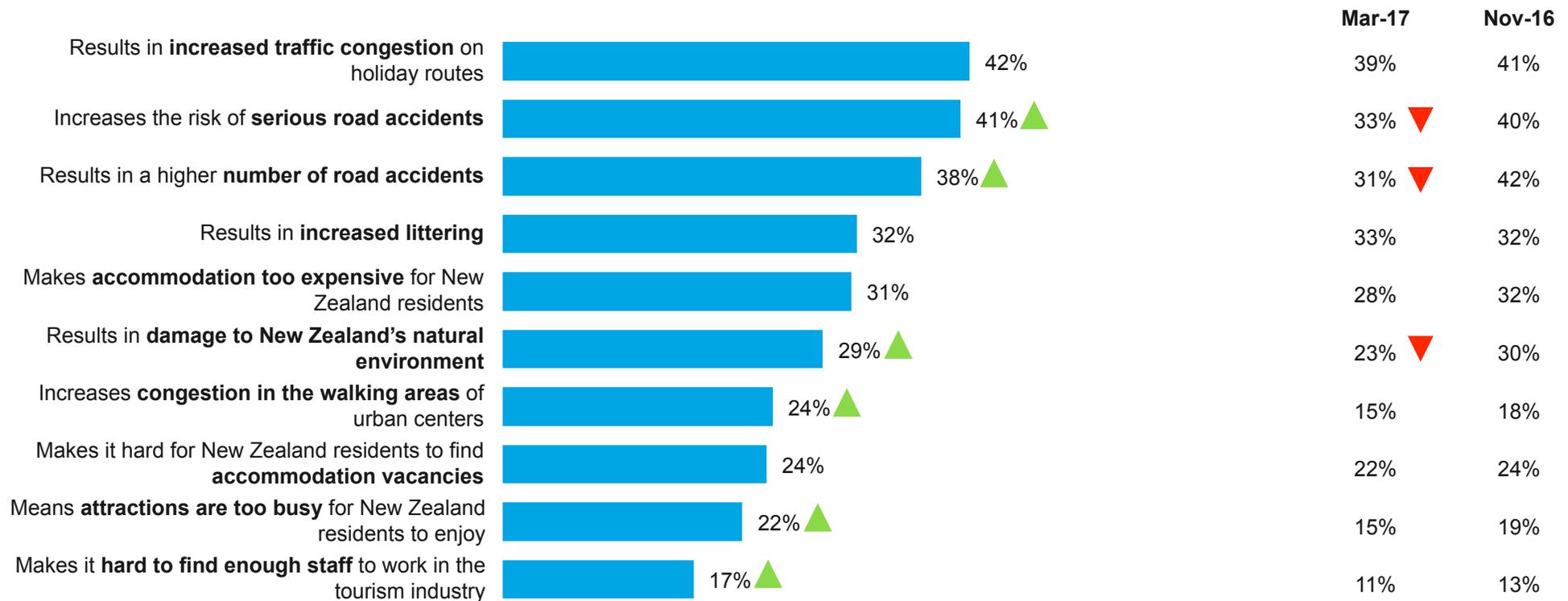
Base: New Zealanders aged 18 plus Nov-16 n = 521; Mar-17 n = 500; Nov-17 n = 501  
 Notes: Agreement on a 7 point scale where 1 is 'strongly disagree' and 7 is 'strongly agree'; Top two box is shown

▲ ▼ 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



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

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

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

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

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

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

1

Results in increased traffic congestion on holiday routes

2

Increases the risk of serious road accidents

3

Results in a higher number of road accidents

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

1

Results in damage to New Zealand's natural environment

2

Results in increased traffic congestion on holiday routes

3

Increases the risk of serious road accidents

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

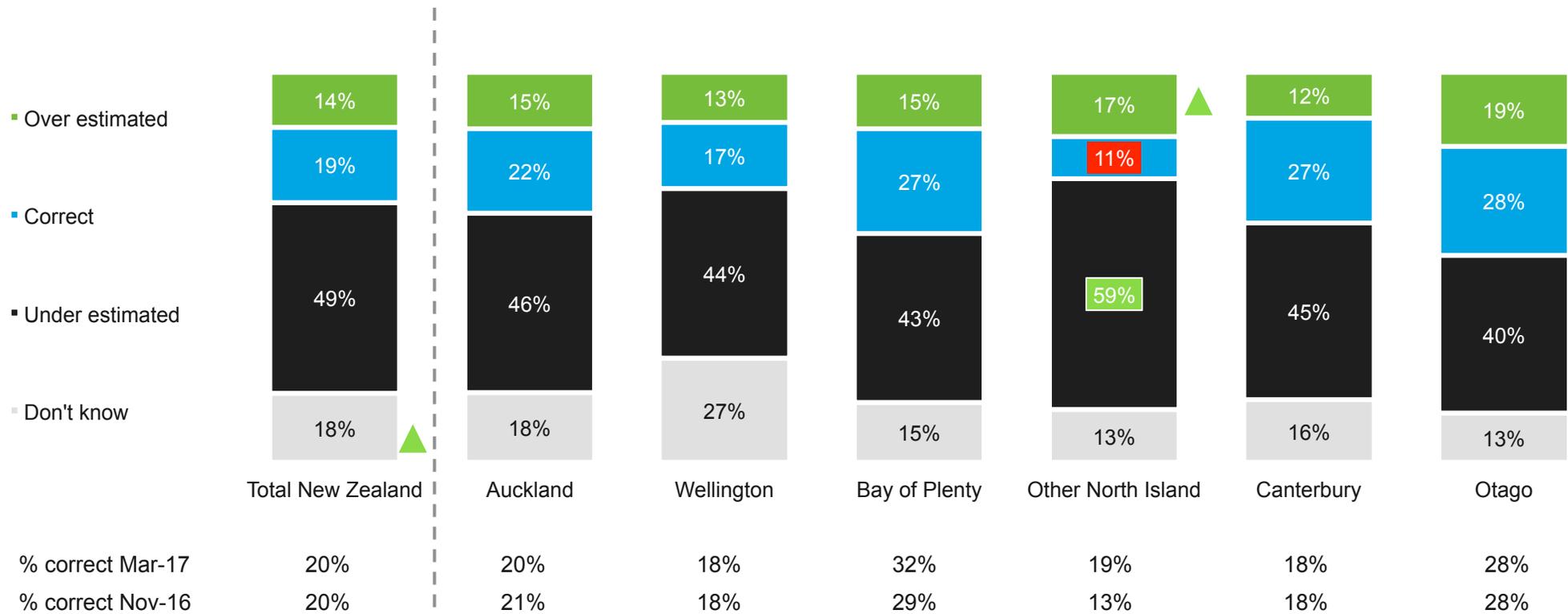
# 4

## 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

%, Nov-17



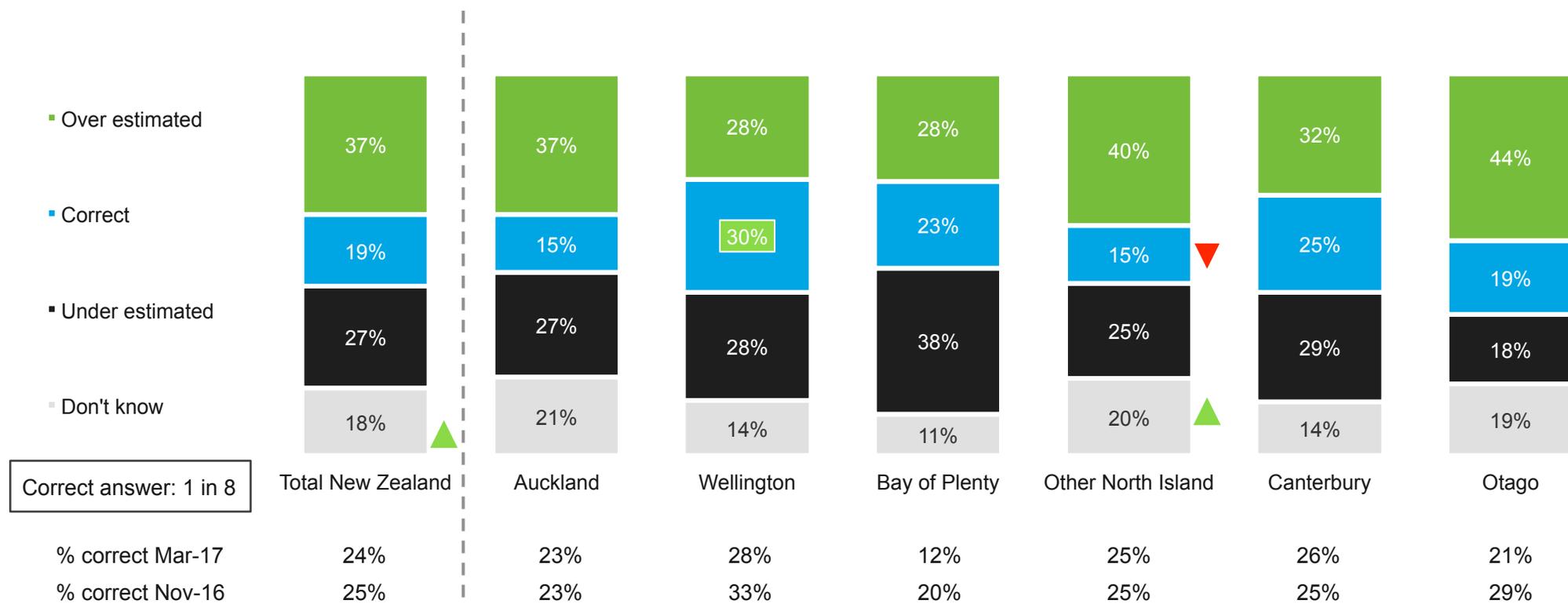
Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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

# 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

%, Nov-17



Correct answer: 1 in 8

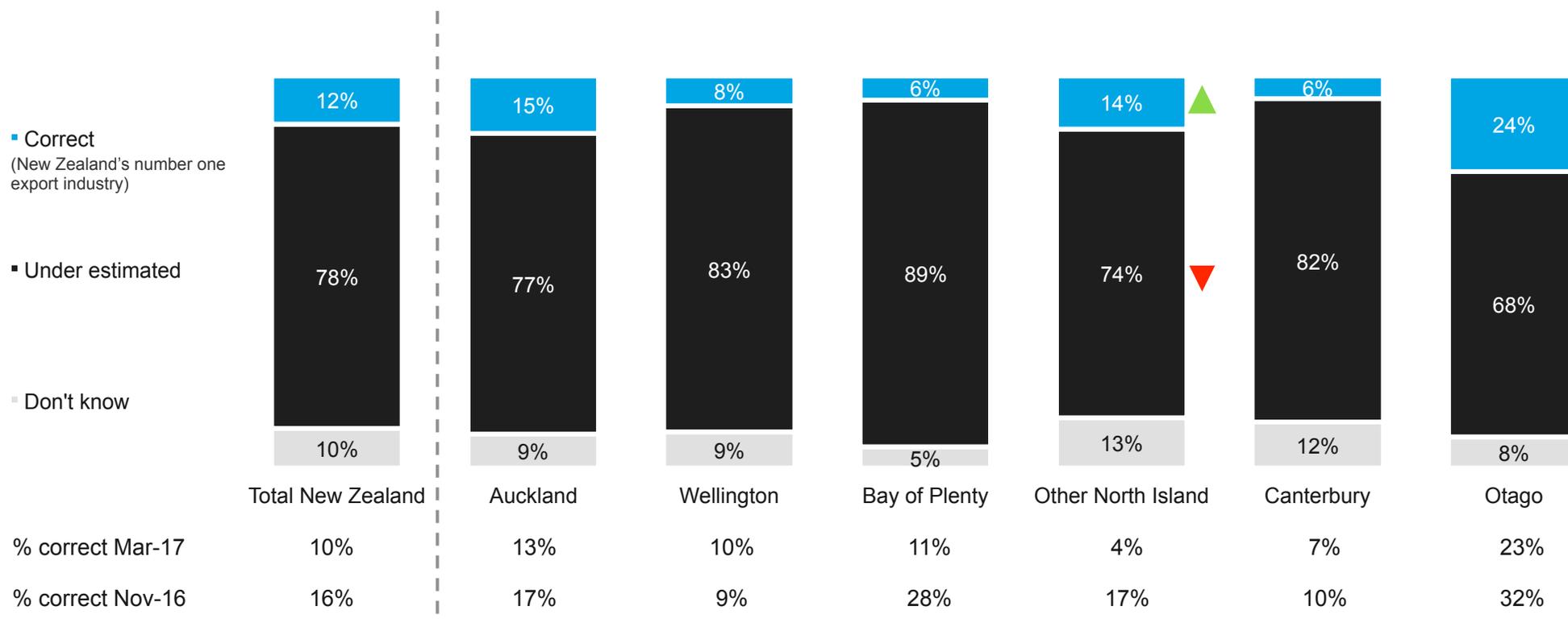
Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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

# 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



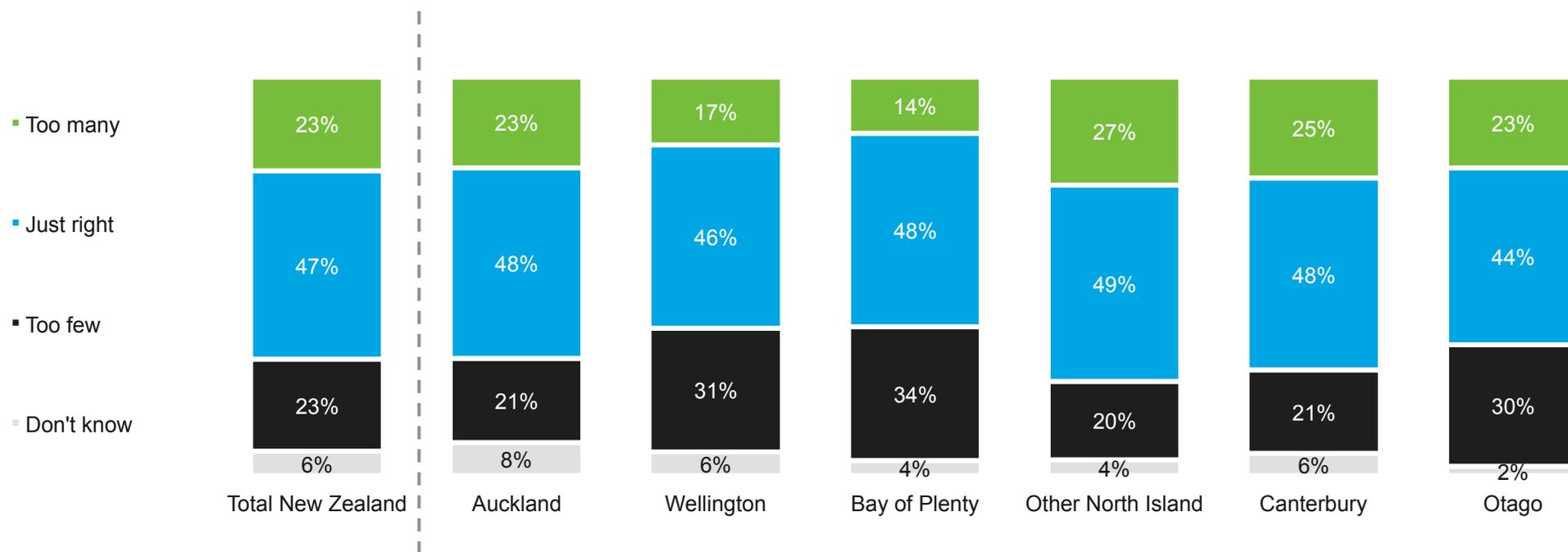
Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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

# 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



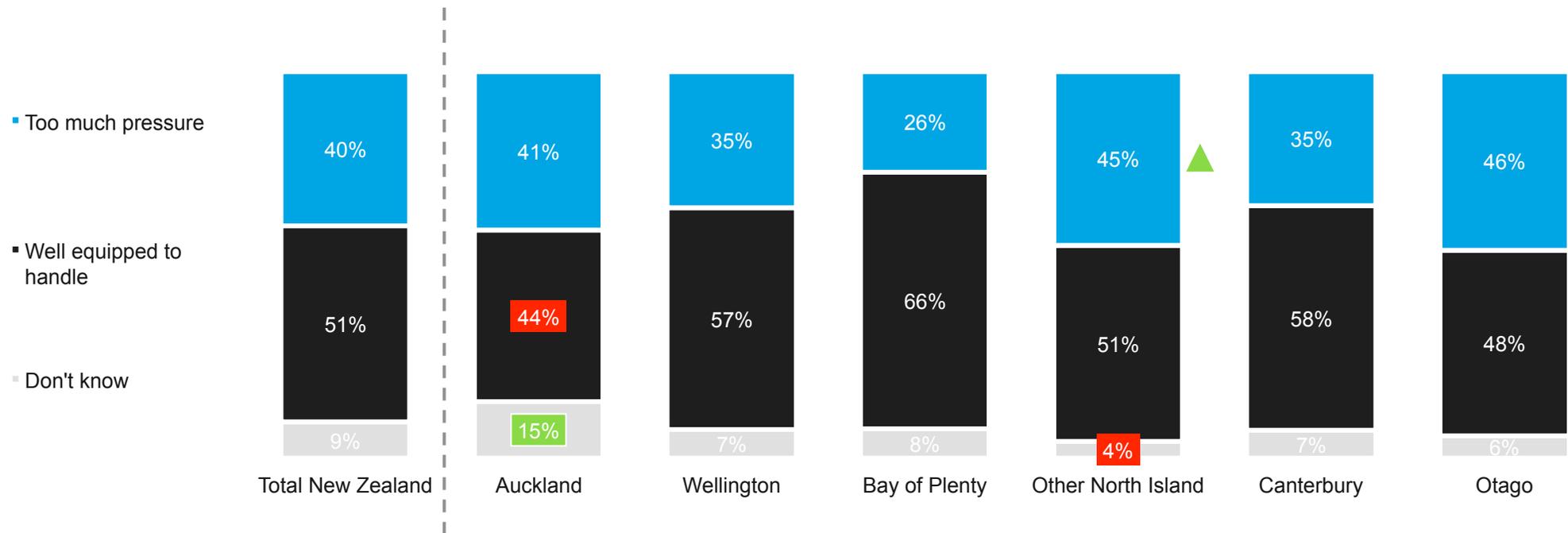
Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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

# 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



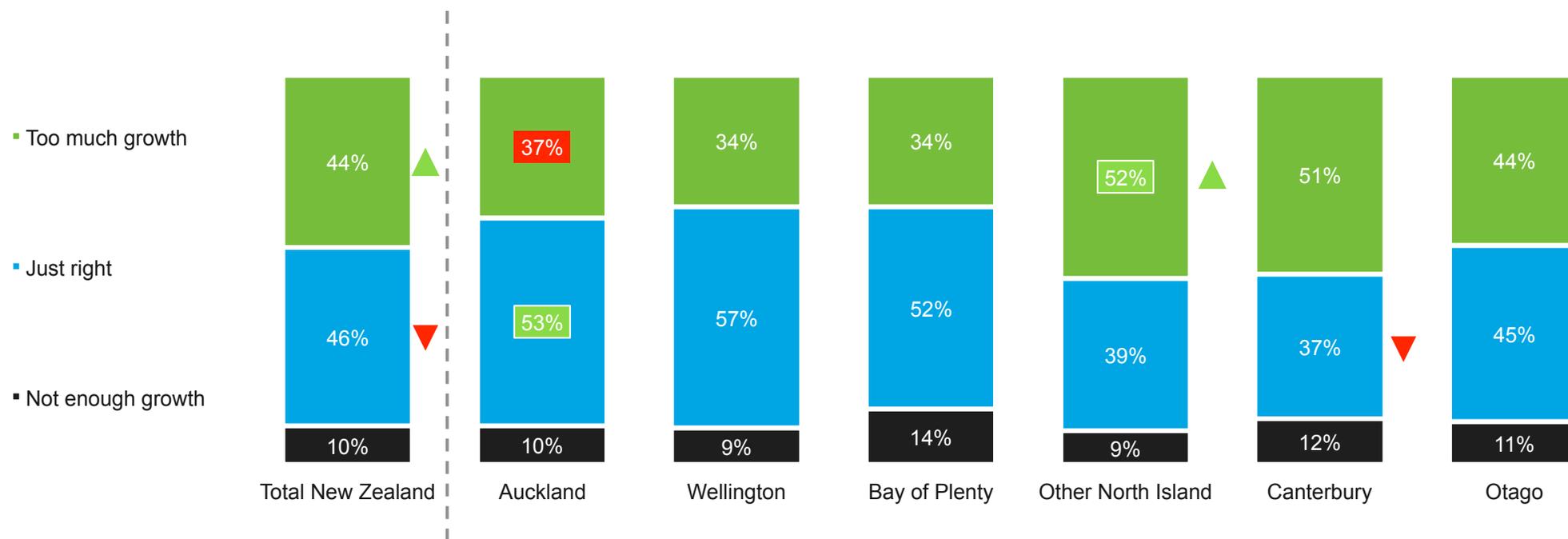
Base: Total NZ n = 501, Auckland n = 100, Wellington n = 100, Bay of Plenty n = 60, Other North Island n = 55, Canterbury n = 101, Otago n = 65

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

# 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



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