VIEWS ON TOURISM PROGRAMME

# **VIEWS ON TOURISM: DUNEDIN**

MARCH 2021 - JULY 2021



# RESEARCH APPROACH

Following are findings from questions included in Dunedin's Views on Tourism research<sup>1</sup> conducted during August 2020 – July 2021. This is the second report and covers the period from March to July 2021.

The questions are designed to measure resident opinion on the value of international and domestic tourism and the extent to which tourism might be having adverse impacts. The research considers Dunedin residents' views on tourism and its impacts on the city, and contrasts this with sentiment expressed by New Zealand residents about New Zealand.

The research involves drawing a representative (by age and gender) sample of at least n=300 Dunedin residents over a six month period from an online research panel. All respondents are aged 18 years or more. The New Zealand sample used as a comparison is collected in the same manner with at least n=200 population representative responses per month obtained.

Using a combination of tourism perception scores, a Tourism Approval Rating (TAR) is calculated for both international and domestic tourism. The TAR is plotted on a six-section scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' perceptions of domestic and international tourism for a destination on an ongoing basis.



# **KEY INSIGHTS**



Dunedin residents' sentiment towards international and domestic tourism remains slightly more positive than the sentiment of New Zealand residents generally. The international TAR score sits at 29 and the domestic TAR score sits at 62 (down 1 and 2 points respectively from the previous reporting period).

83 percent of Dunedin residents have personally benefitted from tourism activity in their local area – a similar proportion to the previous reporting period. The two main benefits are employment opportunities and enabling more local businesses to open/stay open. These benefits are also top of the list for all New Zealanders but are more commonly felt by Dunedin residents. Also, a higher proportion of Dunedin residents than all New Zealanders believe tourism positively impacts their appreciation of local heritage buildings and the natural environment.

In the current reporting period 76 percent of Dunedin residents indicate that have been negatively impacted by tourism activity in their local area - significantly higher than the 63 percent indicating this in the previous reporting period. The proportion of residents who have been impacted by litter and waste generation and damage to the natural environment has decreased since the last reporting period but remains higher than for all New Zealand residents. Infrastructure pressures, car parking, road congestion and driver safety are also areas of common concern and in a higher proportion than nationally.

Only 17 percent of Dunedin residents do not believe enough action is being taken to address the negative impacts, 9 percent don't know, and 74 percent think enough action is being taken.

Looking to the future, Dunedin residents would like the local tourism industry to most focus on infrastructure improvements, creating employment for people in the community, and attracting domestic visitors.

When asked what activities and attractions they would recommend to visiting friends and family, residents most commonly mentioned the Albatross Colony, museums and Larnach Castle.

Assets that residents' most strongly associate with Dunedin largely match what residents' see as being unique about Dunedin compared to other New Zealand destinations. This is heritage buildings, beaches, nature, and wildlife experiences.

## Views on Tourism: Dunedin Residents - Snapshot

### TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of international and domestic tourism



# KEY DUNEDIN ASSOCIATIONS % of residents who most associated [X] with Dunedin (of the five options) 35% 25% 25% 9% 6% Heritage Nature and Wildlife Arts & Culture Food & Beverage Beaches

### FOCUS FOR LOCAL TOURISM INDUSTRY IN FUTURE







Creating employment for people in community



Attracting more domestic visitors

### BENEFITS OF TOURISM - TOP 5

### 83% of residents have benefitted from tourism activity in their area



More local businesses opening, or being able to stay open



Opportunities for employment & income



Inspired me/us to travel domestically



Greater appreciation of historic buildings and sites



Greater appreciation of the natural environment

### **ADVERSE IMPACTS OF TOURISM - TOP 5**

# 76% of residents have experienced adverse impacts from tourism activity in their area



More litter and waste generation



Greater difficulty finding a car park



Too much pressure on community infrastructure



Damage to the natural environment



Takes longer to get to places due to traffic & congestion



**74**% of residents, on average, agree that enough action is being taken to address the negative impacts of tourism activity in their local area

# INTERNATIONAL TOURISM

The vast majority of Dunedin and New Zealand residents agree that international tourism is good for New Zealand. While fewer New Zealanders agree that international tourism is good for the region in which they live, Dunedin residents are more positive.

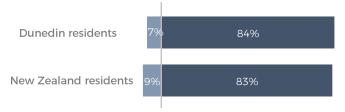
Although the benefits of international tourism are widely acknowledged by Dunedinites, 51 percent believe that international visitors put too much pressure on New Zealand, and 45 percent believe that international visitors put too much pressure on their region – both higher proportions than those recorded for the New Zealand population as a whole.

The international TAR score, which considers the positive and negative impacts of international tourism shows a level of 'limited acceptance' for both Dunedinites and New Zealanders overall. Dunedin's TAR score of 29 is slightly higher than New Zealand's TAR score of 28, but less than Otago region's international TAR score of 35.

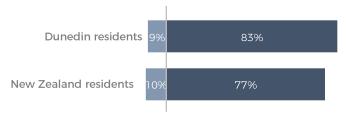
The current reporting period shows an increase in younger Dunedin residents' acceptance of international tourism and a decrease in older residents' acceptance. The TAR score for 18-29 year olds has increased from 32 to 44, and from 33 to 38 for 30-44 year olds, while the TAR score for 45-59 year olds has decreased from 22 to 13.



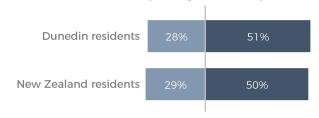
### International tourism is good for New Zealand



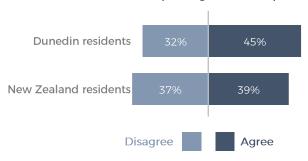
### International tourism is good for my region



### International visitors are putting too much pressure on New Zealand

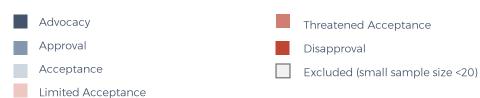


### International visitors are putting too much pressure on my region



# INTERNATIONAL TOURISM





# **DOMESTIC TOURISM**

More than nine in ten Dunedin and New Zealand residents agree that domestic tourism is good for New Zealand and for their region.

Amongst Dunedin residents, 23 percent believe that domestic visitors put too much pressure on New Zealand, and 20 percent believe that domestic visitors put too much pressure on their region – slightly less than the proportion recorded for the New Zealand population as a whole.

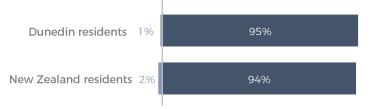
Dunedin's domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, is more favourable than its international TAR score. Dunedin has a domestic TAR score of 62 (for New Zealand it is 59). The Otago region's domestic TAR score is also 62.

Findings also suggest that the 45-59 year old segment is the age cohort least likely to support domestic tourism. This also correlates with findings relating to this group's support for international tourism.

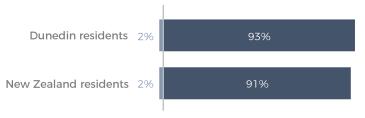
The main difference in results from this reporting period compared to the last is a higher proportion of Dunedin residents (and New Zealand residents overall) stating that domestic visitors are putting too much pressure on New Zealand.



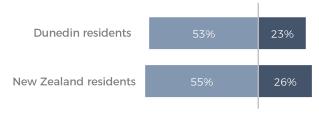
### Domestic tourism is good for New Zealand



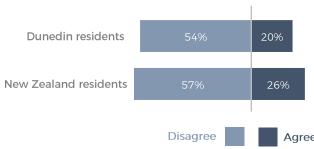
### Domestic tourism is good for my region



### Domestic visitors are putting too much pressure on New Zealand

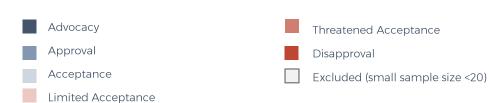


### Domestic visitors are putting too much pressure on my region



# **DOMESTIC TOURISM**

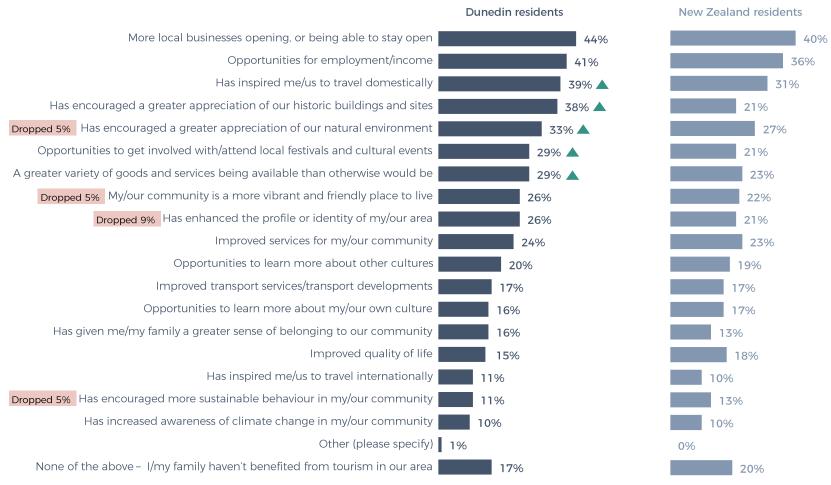






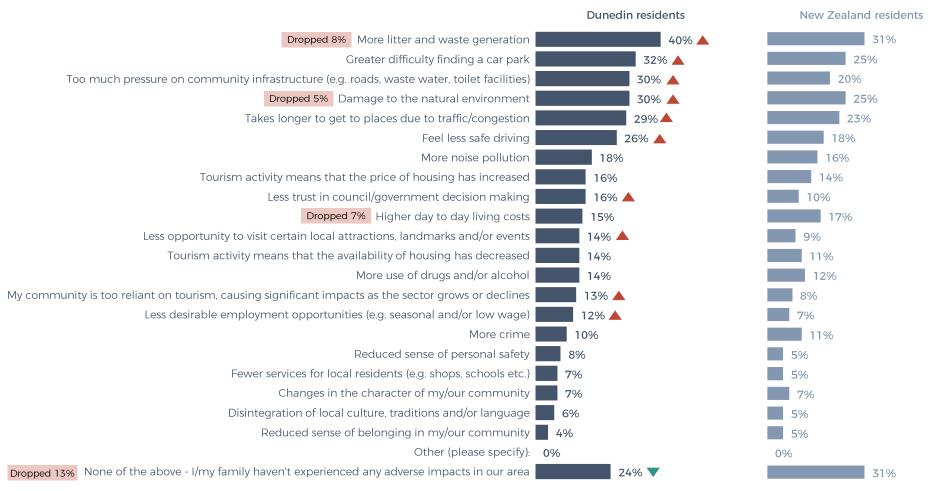
# BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

In which of the following ways, if any, would you say you/your family benefit from tourism activity in your local area?



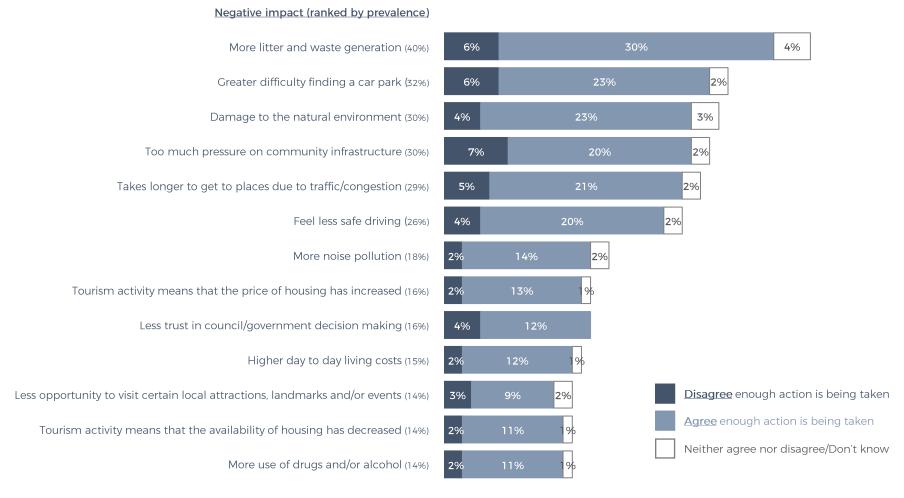
# **NEGATIVE IMPACTS FROM TOURISM ACTIVITY IN LOCAL AREA**

In which of the following ways, if any, would you say you/your family are negatively impacted by tourism in your local area?



# IS ENOUGH ACTION BEING TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM?

[Of those who have been negatively impacted by tourism activity in their local area] Thinking about the areas in which tourism has negatively impacted you/your family, to what extent do you agree or disagree that enough action is being taken to address these...?



# IDEAS FOR BETTER ADDRESSING TOURISM NEGATIVE IMPACTS

[Of those who have been negatively impacted by tourism activity in their local area and strongly disagree or disagree that enough action is being taken to address these] What more do you think could be done?

### **ROADING, TRANSPORT & CAR PARKING**

"Nothing is being done to improve this, more congestion and poor traffic management, reduction in lanes of traffic make it worse."

"Better public transport"

"The removal of over a 1000 carparks in the CBD with no alternative parks have lead me to not want to go into the CBD, there is nowhere to park now."

"More car parking for disabled people"

"Stricter tests before issuing driver permits to visitors"

### HOUSING, LIVING COSTS AND SAFETY

"Airbnb houses used as mailboxes for drug logistics"

"Better checking for drugs. Harsher penalties."

"Too many houses devoted to visitor accommodation so lose community and neighbours"

"Remove freedom campsites from beach areas"

"Put more funding into what people NEED instead of what minor but loud groups want to benefit most people"

### INFRASTRUCTURE (GENERALLY)

"Developers need to pay for the services required to connect to local systems, local authorities focus on 3 waters and roads etc rather than other fluffy rubbish"

"Perhaps need a tourism tax to help fund the necessary infrastructure systems to cope with the increased numbers"

"Freedom camping sites have displaced local green space areas and not supportive of campground businesses"

"More and better accessways to beaches etc plus higher charges for using tracks and beaches"

### THE ENVIRONMENT

"More rubbish bins where allowing parking and camping"

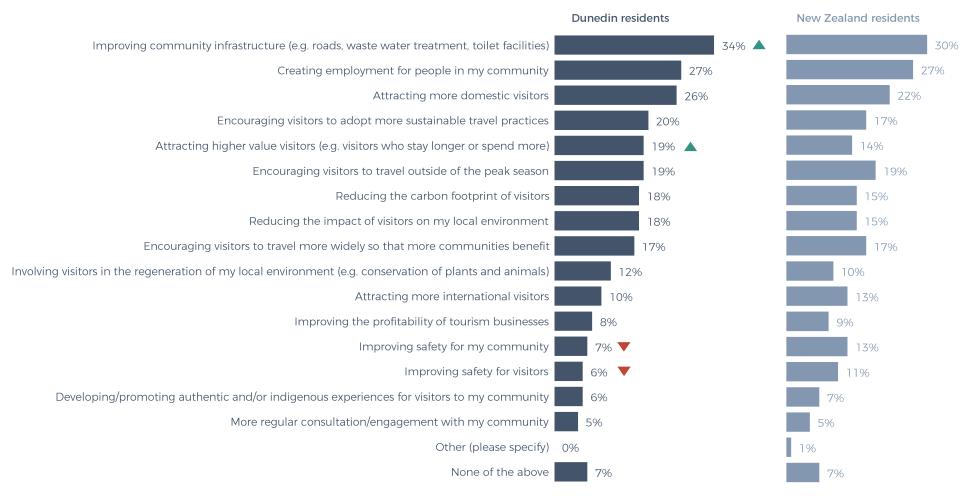
"TLA focusses too much on restricted procurement terms so that contractors never go beyond the terms to provide community service and focus on the litter free clean goal cos there is no benefit or margin left in service contracts."

"Maybe a tourism tax to cover extra costs in maintain our pristine environment."

"Stricter controls on the definition of 'self contained' vehicles and freedom camping in regards to onboard toilets. The human waste on the Otago Peninsula is terrible."

# **FUTURE FOCUS FOR TOURISM INDUSTRY**

On which of the following would you like your local tourism industry to most focus in the future?



# **RECOVERY OF TOURISM**

What other comments do you have, if any, on the recovery of tourism in your community following the COVID-19 pandemic?

"Make it cheaper for the average Kiwi"

"We need help from government and local government. to improve, promote and keep tourism in NZ and area going. Soon there will be nothing left both tourism operators as well as the city centre is dying."

"I feel like places charge way too much for tourist attractions or shops aimed at tourists. It would be nice if us locals weren't priced out of things in our own backyard. Then the impact of reduction in international visitors would be less intense for the business owners too. I don't understand why they try and get a years worth of profit in one tourist season instead of having steady business year round. NZers love travel and seeing things in New Zealand. Its just cheaper to go to Bali then to have a holiday here. I know nothing about business but that's my humble opinion."

"Stop moaning and put in the work. If you choose to be in the service business then provide service, be open when the public and visitors are around, stay open longer, train your staff in service appreciate customers, look for a point of difference do the simple things well."

"Lower taxes on the smaller businesses who can cater to many tourists in smaller centres"

"Could be more support for smaller tourism businesses"

"Make sure they are covid free and have sufficient funds"

"Only allow clean burning cruise liners into the Country... And only if they prove all their waste is held on board the ship between berths" "I think we have placed too much value on international tourists and we need to diversify. encourage film and tv companies here"

"More emphasis on high end tourism and reduction in totals international tourist numbers. Stop government (local and national) providing free facilities for freedom campers, let commercial operators provide these facilities at a cost to the tourist."

"Charges should cover the costs of rubbish removal, maintenance of bush walks & tracks, accessways to beaches etc"

"1. Establish more safety procedures for New Zealand as a destination to be safer for tourists to come to New Zealand.

2. Enforcing more training for locals to be aware of the adverse effects of tourism on the local

community."



# **RECOMMENDED ACTIVITIES**

What Dunedin activities and attractions would you recommend to friends and family visiting you?

The three most commonly recommended activities and attractions were the Albatross Colony (mentioned by 31 percent of respondents), Museums (mentioned by 27 percent), and Larnach Castle (mentioned by 26 percent). Beaches were also mentioned frequently - either in general or by specific reference to certain areas such as St Clair or Tunnel beach. Olveston Historic Home and Dunedin Railway Station were also commonly mentioned.

"The centre of the city where visitors arrive have a variety of buildings, shops, food outlets, and able to walk around to city and mingle among the citizens. There are also buses that can be used to take visitors to other suburbs."

"Concerts and/or out days - such as carnivals"

"Tunnel Beach, Railway Station and other historic buildings, Albatross Colony, Harbour nature cruises"

"Larnach Castle, Heritage Walks, Silver Peaks, Pineapple track, glow works at Ross Creek, Ross Creek, St Clair and St Kilda beaches, Aramoana, Botanic Gardens, Farmers Market, Museums, Knox and First Church, University of Otago." "Beaches. Can't think of anymore."

"Larnach Castle, Speights Brewery, Railway Station"

"Nature walks and beaches, cafes and restaurants, street art and historic buildings and the penguins"

"The Taieri Gorge train. Don't let us loose it"

"Baldwin street, Allan's beach"

"Albatross colony
Larnach Castle
Penguin Place
Otago Museum
Toitu Settlers Museum
Dunedin Art Gallery
Orokonui Wildlife Sanctuary
Quarantine Island, Port to Port ferry
the Monarch wild life trips"

"Wildlife at the Peninsula as well as visiting Larnach castle. Also cycling from city to Portobello. Driving along the coast to Taieri Mouth as beaches are beautiful."

"Larnach Castle. sandfly Bay. tunnel beach. Mt Cargill walk or drive. railway station. Toitu. Otago museum. heritage precinct."

# WHAT MAKES DUNEDIN UNIQUE?

What, if anything, do you think makes Dunedin unique compared to other New Zealand destinations?

Dunedin's historical architecture and access to unique wildlife are the two most common things that residents think makes Dunedin unique compared to other destinations. Both were mentioned by one in five respondents. There is also pride in the friendliness of the local people, and the student/university feel of the city. One in ten respondents mentioned the compactness of the city (with easy access to multiple attractions and an easily accessible CBD) as a unique destination characteristic.

"Lots of old buildings"

"Student culture"

"There is a bit of everything and it is easy to access without wasting time travelling to get to each destination, sea, bush, mountains as well as lots of choice with food"

"Architecture! Easily walkable CBD, Dunedin Gothic"

"Heritage buildings
University precincts as part of city
Friendly people helpful to tourists
Smaller size so easy to get around, find parking
etc. yet has a city feel"

"Diversity, welcoming community, vibrant, variety of activities (in and outdoors, day and night life)"

"Victorian & Edwardian architecture, Otago peninsula and harbour and a large number of worthwhile cultural opportunities in a relatively small area"

"Awesome scenery, people and the sunrise and set are stunning + Aurora are possible catch too."

"History and wildlife. Good food."

"Original major settlement of NZ, first university, more Scottish influence in the city and architecture" "Combination of nature and art"

"Railway station"

"Friendliness of the people, Historic buildings.

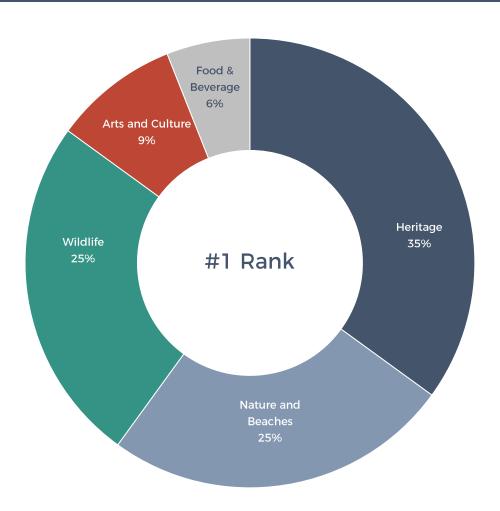
Peaceful"

"Wildlife on our door step. Nice small town not major city so still have intimacy feel"

"Dunedin is different from everywhere in New Zealand because Dunedin is home to the world's only land-breeding albatross colony, the Royal Seagull Centre, where you'll also find sea lions, seals and seals. feathers and rare penguins."

# **DUNEDIN'S KEY STRENGTHS**

Which of the following do you most associate with Dunedin? [Rank in order of association from 1 most associate to 5 least associate]



	Overall Rank
#1	Heritage
#2	Nature and Beaches
#3	Wildlife
#4	Arts & Culture
#5	Food and Beverage



# SAMPLE DEMOGRAPHICS — DUNEDIN RESIDENTS

Total S	amp	le
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Gender	
Male	48%
Female	52%
Age	
18 - 19 years	4%
20 - 24 years	9%
25 - 29 years	6%
30 - 34 years	6%
35 - 39 years	9%
40- 44 years	8%
45 - 49 years	6%
50 - 54 years	8%
55 - 59 years	9%
60 - 64 years	9%
65 - 69 years	10%
70 - 74 years	8%
75+ years	9%
Base: Total Sample	n=301

### Total Sample

Travel in Past 12 Months	
Travelled in New Zealand	74%
Travelled outside New Zealand	3%
Have not travelled	24%
Household Composition	
My husband, wife or partner	55%
My mother and/or father	2%
My child/children aged under 5	7%
My child/children aged 5 - 14	11%
My child/children aged 15+	13%
Other family/relatives	7%
Other person(s)	12%
None of the above - I live alone	16%
Prefer not to say	3%
Base: Total Sample	n=301

### Total Sample

Ethnicity	
New Zealand European	87%
Other European	5%
New Zealand Māori	9%
Cook Island Māori	1%
Pacific Peoples	2%
Chinese	1%
Indian	1%
African	0%
North American	0%
Latin American	0%
South American	0%
Middle Eastern	1%
Other	4%
Prefer not to say	1%
Base: Total Sample	n=301

