# **ŌTEPOTI DUNEDIN COMMUNITY VIEWS ON TOURISM** AND DESTINATION DEVELOPMENT NOVEMBER 2022 dunedin

# **ŌTEPOTI DUNEDIN COMMUNITY VIEWS ON TOURISM AND DESTINATION DEVELOPMENT**

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# BACKGROUND, OBJECTIVES & METHODOLOGY

## **Background and Objectives**

Currently in development, Ōtepoti Dunedin's Destination Management Plan will put the community's needs and aspirations at the heart of decision-making about tourism development in the region.

To inform preparation of the Plan, a programme of research was developed to gather perspectives from Ōtepoti Dunedin's residents, including people from all walks of life, of all ages and stages, living in communities right across Greater Dunedin. The research was designed to understand the community's hopes for the future, views on tourism in Ōtepoti Dunedin, and perspectives on how tourism could, or should, develop over a planning horizon of 30 years or more to align with and contribute to the community's aspirations for the future.

Specifically, the research objectives were to understand:

- 1. How communities see Ōtepoti Dunedin now and the vision they have for the region's future.
- 2. How tourism is viewed by communities (including the importance of tourism, its benefits, and any adverse impacts).
- 3. Challenges and opportunities for tourism businesses.
- Key areas of focus and priorities for the future regarding the development of tourism in Ōtepoti Dunedin.

The research considered not only the economic costs and benefits of tourism, but its social, cultural and environmental impacts. In doing so, it aligns with and supports Dunedin City Council's 'Refreshed Draft' Strategic Framework and the key workstreams that are identified.

## Methodology

The community research was undertaken in two stages and designed in collaboration with representatives of Dunedin City Council and a public/private sector Destination Management Plan Steering Group.

#### Stage One - Qualitative Hui/Discussion Groups

Stage One included seven Community hui or discussion groups, each involving ten or more residents of Ōtepoti Dunedin (a total of 71 people). These were designed to explore and understand the aspirations that Ōtepoti Dunedin's communities have for their future, perspectives on tourism now, and the role that tourism could play as a positive 'force for good' in the future.

With the assistance of Nadia Wesley-Smith, Manager Te Rūnanga ō Ōtākou Inc, a first hui was convened with Te Rūnanga ō Ōtāko to ensure a Mana Whenua perspective was understood.

To understand intergenerational shifts in attitudes, lifestyle and values - and how these might play out in Ōtepoti Dunedin - one group focused specifically on rangatahi or youth (15-19 year olds).

The remaining five groups were distributed across areas of Ōtepoti Dunedin; Dunedin central and inner city suburbs; Otago Peninsula/Macandrew Bay; Waikouaiti/Karitane/Blueskin Bay, Middlemarch; and Mosgiel/Strath Taieri.

Each of these groups was structured to reflect a specific age/gender/lifestage/ethnicity mix and included people in varying forms of employment, of varying socio-economic status, and with varying connection to Ōtepoti Dunedin (from new residents to those with multi-generational roots in the community). By applying these specific sample quotas, we were able to ensure that the full diversity of Ōtepoti Dunedin's population was represented in the qualitative research.



## **ÖTEPOTI DUNEDIN COMMUNITY VIEWS ON TOURISM AND DESTINATION DEVELOPMENT**

# **METHODOLOGY (CONT.)**

#### Stage Two - Community-Wide Survey

Stage Two involved a larger-scale online survey of residents which was designed to validate and build upon key findings from the qualitative research, and to quantify support for an identified range of 'tourism futures' for Ōtepoti Dunedin.

The survey questionnaire included a number of questions from Angus & Associates international, national and regional community sentiment benchmarking programme, Views on Tourism. This has enabled us to compare tourism-related attitudes, experiences and expectations of people in Ōtepoti Dunedin with those of people living in other destinations.

All responses to the survey were received online although a range of other options were made available to reduce any barriers to participation. Alternative methods available included self completion paper copies of the questionnaire, an i-pad located at the Ōtepoti Dunedin i-SITE, and telephone interviews.

The survey ran online from Monday 26th September to Tuesday 18 October. The final sample achieved was 478 residents of Ōtepoti Dunedin, aged 15 years or more.

## Recruitment and Sample Development

Several methods were used to recruit participants, both for Stages One and Two of the research programme. Angus & Associates worked with Enterprise Dunedin to develop communications about the research which was publicised across multiple media channels (traditional – including print and radio – and digital). Information about the research was also distributed via available databases and through partner agencies.

Periodic bursts of communications activity and reminders continued throughout the research period. All communications invited residents to register for the research via a dedicated URL (www.angusassociates.co.nz/dunedintourismfuture) and linked QR code.

Simultaneously, a member of Angus & Associates' field team visited all main towns/population centres across Ōtepoti Dunedin to encourage residents to register for the survey. Their schedule was designed around community events, places and activities where people congregated, and which appealed to residents from across the demographic spectrum.

Angus & Associates offered participants in the hui/discussion groups a koha of a \$100 Visa Prezzy card in appreciation of their time (each group lasted for two hours or more) and to cover travel costs. A prize draw incentive was offered to those who responded to the community-wide survey: an opportunity to win one of two \$250 Visa Prezzy cards.

#### **Analysis**

Following quality control and data cleaning procedures, the final survey sample was weighted to reflect the characteristics of Ōtepoti Dunedin's population aged 18 years or more, with regards to area, gender, and age group, based on 2018 New Zealand Census data.

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# SUMMARY: PERCEPTIONS OF OTEPOTI DUNEDIN

## Why live in Ōtepoti Dunedin?

Residents choose to live in Ōtepoti Dunedin for many and varied reasons; not least because whānau and friends also live there, but also for the educational and work opportunities available, and because it's seen as a good place to bring up a family.

#### **Regional Strengths**

These factors are reflected in perceived regional strengths: overall quality of life, quality of the natural environment, educational opportunities, affordability and sense of community. Õtepoti Dunedin is also acclaimed by residents for its recognition and celebration of local history/heritage, and the food and drink activities/experiences and other leisure activities and events that are on offer.

Different communities across Õtepoti Dunedin are seen to have different strengths. For example, Dunedin City/inner suburbs is seen favourably in relation to educational opportunities and affordability, while quality of the natural environment is seen as a particular strength of their local area by residents of Otago Peninsula and Waikouaiti Coast.

## Regional Weaknesses

At a region-wide level, Ōtepoti Dunedin's greatest weaknesses (in the context of a place to live and/or to visit) are its public transport services, roading, housing for residents, local planning and coordination, and shopping opportunities. Health services, waste management facilities, employment opportunities, resilience to disasters and climate change, public profile/image and affordability are also regarded as weaknesses by at least one-in-five participating residents.

Public transport and roading top the list of perceived weaknesses in four of the five geographic areas: Mosgiel/North Taieri and Strath Taieri being the exception. However, it is noted that in the qualitative research the mothballing of the Taieri Railway was considered a major concern by residents of Middlemarch who felt 'disconnected' from Ōtepoti Dunedin as a consequence.

#### Qualitative Insights

In the qualitative research that preceded the community-wide survey, younger residents also spoke of limited choices (in relation to shopping and entertainment) and perceived limits to work and career opportunities in Ōtepoti Dunedin.

In this context too, residents were critical of Dunedin's public transport network, its roading, and poor transport connections – road, rail, air – with other parts of New Zealand and abroad. Particular concern was voiced about infrastructure planning and development and whether infrastructure could cope with future population growth and any return to large-volume tourism activity.

Group participants spoke of a better future for Ōtepoti Dunedin being built on;

- 1. Cohesive and forward-thinking city/regional planning and development
- 2. Development of a confident, positive, vibrant and connected city
- 3. Inclusive community consultation and engagement
- 4. Prioritisation of initiatives relating to environment and climate change.

## **Destination Strengths and Weaknesses**

Many of the core strengths and weaknesses noted here pertain as much to Ōtepoti Dunedin as a place to visit as to live. Visitors and the visitor industry are **reliant** on effective and efficient public transport, good quality roading, a high standard of health service support, and excellent waste management infrastructure.

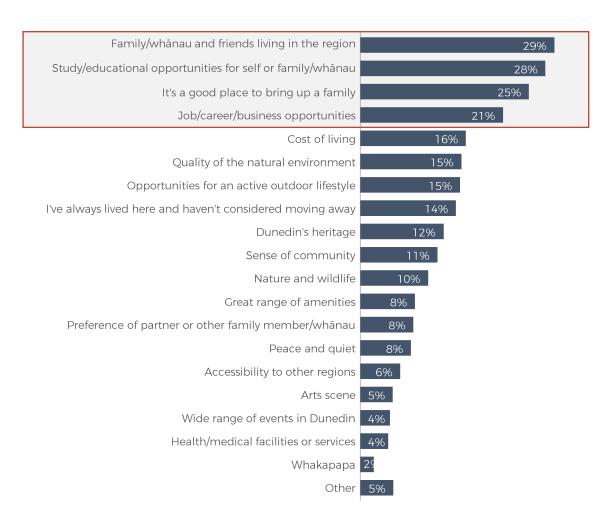
The more specifically visitor-focussed attributes of Ōtepoti Dunedin are regarded more often as regional strengths than weaknesses. For example, a third of residents regard hospitality (welcoming people) as a strength and very few as a weakness; almost 30% regard visitor activities and attractions as a strength, and just 11% as a weakness.

Nevertheless, there remain concerns about Ōtepoti Dunedin as a visitor destination, as discussed further on page 39 (Quality of Visitor Experience).



# MOTIVATIONS FOR LIVING IN ŌTEPOTI DUNEDIN

What are the main reasons you choose to live in Ōtepoti Dunedin? Please select up to 3 options



#### MORE LIKELY TO LIVE IN OTEPOTI DUNEDIN ...

#### FOR STUDY/EDUCATIONAL OPPORTUNITIES

- Younger residents (aged 15-29 years)
- Residents of CBD and inner suburbs

#### BECAUSE IT'S A GOOD PLACE TO BRING UP A FAMILY

- Residents aged 30 years or more
- Residents with children in the household
- Males

#### FOR JOB/CAREER/BUSINESS OPPORTUNITIES

- Residents aged 30-39 years and 50-59 years
- Males

#### FOR HEALTH/MEDICAL FACILITIES OR SERVICES

· Residents aged 60 years or more

#### QUALITY OF NATURAL ENVIRONMENT

· Residents of Peninsula, Waikouaiti Coast and West Harbour

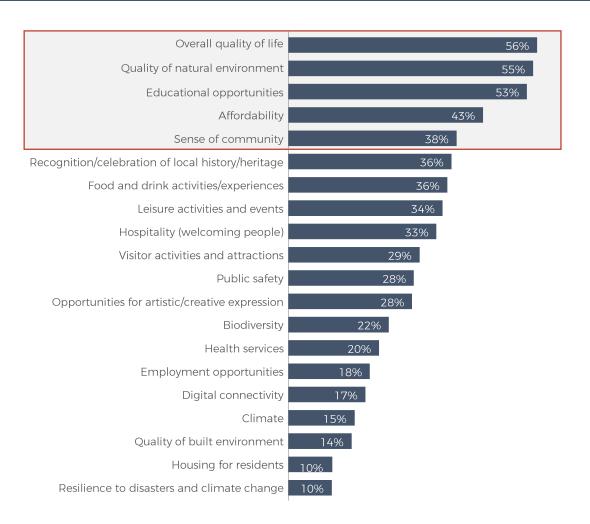
#### NATURE AND WILDLIFE

· Residents of Peninsula, Waikouaiti Coast and West Harbour



# STRENGTHS OF OTEPOTI DUNEDIN

Listed below are some of the many factors that can define whether a place is appealing to live in or to visit. Which of these do you see as current strengths of Ōtepoti Dunedin?



"Proximity is a big positive for Dunedin - with an exceptional harbour, wonderful and interesting hills and beaches all within 15 minutes' drive or less from the city center. This lends itself to being a fantastic outdoor recreation hub for surfing, walking, boating and biking. We also have fantastic cultural offerings in our Art Gallery, Museum, Early Settlers Museum and Olveston - all again within close proximity. I always say Dunedin the City that is big enough to be interesting but small enough to feel at home!!"

"The students bring a vibrancy to the city which makes it an interesting place to live and visit."

"Unique/boutique shopping. Small but original, owner operated. Breath of fresh air from malls and national/international chains."



# STRENGTHS OF LOCAL AREAS

Listed below are some of the many factors that can define whether a place is appealing to live in or to visit. Which of these do you see as current strengths of the area in which you live? (Top 5)

Top Five	Ōtepoti Dunedin City and inner suburbs	Mosgiel / North Taieri + Strath Taieri	Otago Peninsula	Waikouaiti Coast	West Harbour
1	Overall quality of life	Overall quality of life	Quality of natural environment	Quality of natural environment	Overall quality of life
2	Educational opportunities	Sense of community	Overall quality of life	Sense of community	Sense of community
3	Quality of natural environment	Climate	Sense of community	Overall quality of life	Quality of natural environment
4	Affordability	Public safety	Biodiversity	Hospitality (welcoming people)	Hospitality (welcoming people)
5	Sense of community	Quality of natural environment	Visitor activities and attractions	Biodiversity	Biodiversity



# STRENGTHS OF LOCAL AREAS

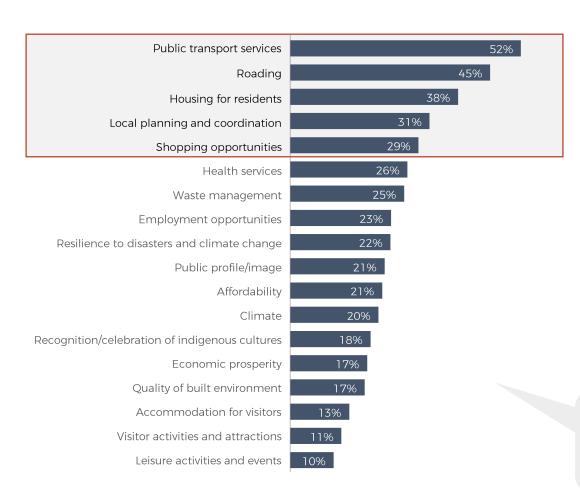
Listed below are some of the many factors that can define whether a place is appealing to live in or to visit. Which of these do you see as current strengths of the area in which you live? (Top 5)

Strengths	Dunedin City and inner suburbs	Mosgiel / North Taieri + Strath Taieri	Otago Peninsula	Waikouaiti Coast	West Harbour
Overall quality of life	53%	68%	78%	77%	72%
Sense of community	37%	50%	58%	77%	56%
Quality of natural environment	38%	31%	82%	85%	54%
Affordability	37%	27%	29%	30%	24%
Educational opportunities	39%	19%	20%	6%	5%
Leisure activities and events	27%	28%	35%	30%	16%
Public safety	25%	31%	27%	26%	20%
Food and drink activities/experiences	23%	14%	9%	19%	16%
Hospitality (welcoming people)	20%	26%	36%	41%	35%
Recognition/celebration of local history/heritage	19%	9%	21%	34%	10%
Digital connectivity	20%	7%	16%	0%	3%
Climate	13%	36%	25%	28%	18%
Housing for residents	17%	17%	12%	10%	4%
Opportunities for artistic/creative expression	17%	6%	19%	22%	29%
Public transport services	16%	16%	5%	9%	10%
Health services	14%	16%	14%	8%	13%
Biodiversity	13%	2%	57%	38%	33%
Visitor activities and attractions	14%	8%	41%	30%	13%
Employment opportunities	12%	14%	10%	3%	13%
Shopping opportunities	13%	3%	3%	0%	0%
Quality of built environment	11%	8%	14%	0%	0%
Base: Dunedin residents	n=314	n=56	n=53	n=25	n=25



# **WEAKNESSES OF OTEPOTI DUNEDIN**

Listed below are some of the many factors that can define whether a place is appealing to live in or to visit. Which of these do you see as current strengths of Otepoti Dunedin?



"The city centre is full of cars and so not a pleasant place to walk and shop. It is not safe for kids to walk into town due to inadequate pedestrian routes and pavements, without safe crossing points. Our urban planning is way behind other cities who are recognizing the value of mode shift and livable cities, with pedestrianized or low traffic green spaces. There is inadequate public transport into the city. Car parking in a few large car parks with little electric shuttle buses for all would make the city accessible for everyone."

"Heritage buildings being left to rot by developers - area blight on the city scape. It makes Princes Street feel scungy. It would be amazing for those heritage buildings to be restored."

"Given our proximity to such a variety of natural attractions with amazing views, volcanic cones, beautiful inlets and also the proximity to a number of great rides which extend to our borders - we have not created and integrated a track/trail/cycle plan around which we could build a whole new offering for Dunedin."



# **WEAKNESSES OF LOCAL AREAS**

What do you see as current weaknesses of the area in which you live? (Top 25)

Top Five	Ōtepoti Dunedin City and inner suburbs	Mosgiel / North Taieri + Strath Taieri	Otago Peninsula	Waikouaiti Coast	West Harbour
1	Roading	Public transport services	Public transport services	Public transport services	Roading
2	Public transport services	Shopping opportunities	Roading	Roading	Public transport services
3	Housing for residents	Local planning and coordination	Waste management	Health services	Shopping opportunities
4	Affordability	Roading	Local planning and coordination	Public profile/image	Resilience to disasters and climate change
5	Local planning and coordination	Affordability	Shopping opportunities	Resilience to disasters and climate change	Waste management



# **WEAKNESSES OF LOCAL AREAS**

What do you see as current weaknesses of the area in which you live?

Strengths	Dunedin City and inner suburbs	Mosgiel / North Taieri + Strath Taieri	Otago Peninsula	Waikouaiti Coast	West Harbour
Public transport services	35%	45%	51%	67%	45%
Roading	37%	33%	34%	53%	46%
Affordability	24%	32%	22%	16%	14%
Local planning and coordination	23%	35%	27%	26%	19%
Housing for residents	25%	22%	22%	30%	22%
Shopping opportunities	21%	37%	27%	17%	36%
Waste management	21%	20%	28%	28%	25%
Health services	16%	20%	21%	51%	12%
Employment opportunities	14%	15%	16%	35%	13%
Resilience to disasters and climate change	14%	8%	25%	37%	32%
Food and drink activities/experiences	11%	28%	26%	10%	9%
Public profile/image	13%	9%	6%	38%	4%
Quality of built environment	13%	8%	14%	34%	10%
Economic prosperity	11%	14%	11%	17%	3%
Recognition/celebration of indigenous cultures	11%	13%	9%	18%	23%
Climate	12%	4%	12%	0%	6%
Base: Dunedin residents	n=314	n=56	n=53	n=25	n=25



# QUALITATIVE PERSPECTIVES ON ŌTEPOTI DUNEDIN

## On Feeling Connected

People living in communities outside of Dunedin City were asked if they identified with Ōtepoti Dunedin and felt part of a wider region.

Despite their distance from Dunedin City, Waikouaiti residents felt very much part of a Greater Dunedin region. While they valued their local community, they also appreciated all that Ōtepoti Dunedin had to offer. Commuters especially enjoyed straddling both worlds; their business/professional life in the City and their family/weekend/relaxing life away.

The perspective of Middlemarch residents was very different. They felt "annexed" and "alienated" by distance, poor infrastructure and service, and a Council who they thought treated their requests for improvement – for example, to water and sewage systems – as a nuisance. Some felt that people from Ōtepoti Dunedin didn't know where Middlemarch was and visitors from other parts of New Zealand would not immediately associate the town with Ōtepoti Dunedin.

Middlemarch residents wanted to be included, consulted, and considered on issues important to their community. Used to feeling "ignored and unseen", many welcomed the opportunity to participate in this research as a sign that Dunedin City Council recognised and remembered them as part of the wider region.

"No, not at all. And to be honest, I think the council feel the same way about us. We are sort of like a little old town and Hyde is even further away. I mean, who are they? Where are they? You talk to people in Dunedin, and you give your address up at Middlemarch. And sometimes you hear them. They say, where's that? I'm part of your town" (Middlemarch)

""Don't get the same services; pay the same but for less if live more rurally." (Middlemarch) "The idea that you kind of have that rural life, but access to our city, a beautiful environment. I mean, what is not to love when you look out and see the rocks and you see the mountain." (Middlemarch)

"Everything you need in a small place ... It's kind of like what you said, the place feels very like grounded and ... if you want to get something done, you know, somebody who knows somebody." (Otago Peninsula)

## On the Benefits of Living in Ōtepoti Dunedin

There are many benefits that residents associate with living in Ōtepoti Dunedin and aspects they value and enjoy, including:

- The people are proud, grounded, practical and genuine. They are friendly and talk to strangers.
- It is a real place with a sense of community, with a heart and soul. Real people live here, with real jobs and real lives. People, social groups, and places overlap and are connected so people know each other. It is seen as more real and authentic than Queenstown for example.
- Dunedin is a unique place with its own character. It is quirky, different, and unexpected and does not need to compare itself or compete with other places.
- Residents have the best of both worlds, with accessible and beautiful nature and wildlife, rural and city living and amenities within easy reach.
- Dunedin is a great place to bring up a family.
- It has a stunning natural environment and scenery, easy access to beaches, forests, mountains, and agricultural landscapes. Dunedin is more connected to the planet compared with other cities.
- The European heritage and architecture are unique.
- · There is much that is accessible and free.



# QUALITATIVE PERSPECTIVES ON ŌTEPOTI DUNEDIN

## On the Downsides of Living in Otepoti Dunedin

Even Ōtepoti Dunedin's strongest supporters offered up some criticisms of the City and wider region.

Some younger residents feel that Ōtepoti Dunedin is too small and quiet and that there is a limited choice of activities and events. Music venues are closing and there are few shopping opportunities (including big brand stores). They are put off by perceived limits on professional and job opportunities in Ōtepoti Dunedin and lured by job options and bigger salaries in other parts of New Zealand or Australia. Some are seeking a warmer climate and 'cooler', more exciting vibe, in places like Nelson or Queenstown.

Many residents who took part in the discussion groups were critical of Ōtepoti Dunedin's public transport network and of its isolation and poor connections with other parts of New Zealand (and abroad), with no international flights, no train, and no public transport to and from the airport.

Others criticise poor infrastructure development and planning, including roading, and public parking, which they worry will not cope with future population growth and a return to "mass tourism". They also worry about the 'fate' of South Dunedin if climate change is not addressed.

The downside of living in a 'smallish' city is that it can limit progression and development, through fear of change, lack of courage and blue sky thinking, and limited investment. Some dislike the 'two degrees of separation' and that everyone knows each other.

Attitudinally, some Ōtepoti Dunedin people can be uncooperative, unwilling to collaborate and reluctant to act or take responsibility. While people have great ideas, it is hard to get support to develop them.

Accordingly, some feel there has been a lack of progress in Ōtepoti Dunedin, with businesses closing and a quiet and uninviting city centre. There is a view that a few powerful people have too much influence in the city centre (property/landowners) and that there is a tendency for wealthy local individuals to invest outside of the city.

"I've got one observation. Yep. I worked for [FUNDING ORGANISATION] trying to give away money and it was very hard to give it away in Dunedin because people were uncooperative <laugh> go to Invercargill and they just suck it up. But Dunedin, I could, I had huge amounts of money to give to the art gallery, but we had five live motions on the floor. Only one of which was seconded. And after 18 months I couldn't get rid of it. I think Dunedin is not conservative. It's just uncooperative. (Otago Peninsula)

"Especially with the development of the new hospital too. There's no car parking. There's no new car parking for that whole three blocks of the new hospital. (Mana Whenua)

"Yeah, even though I am, you know, raised in Dunedin, I've got my eyes on (a career at) The Beehive at the moment." (Rangatahi)



# QUALITATIVE PERSPECTIVES ON ŌTEPOTI DUNEDIN

## On the Best Possible Future for Otepoti Dunedin

There were four main themes in residents' kõrero on a best possible future for Ōtepoti Dunedin.

- 1. Cohesive and forward-thinking city/regional planning and development
  - · Population stable or growing.
  - Infrastructure development which is ahead of (or at least keeps pace with)
    the city's needs, including traffic management, roading, water, sewage,
    parking, speed limits, public transport, internet, a working train and support
    for an electric car fleet.
  - Urban regeneration which supports venues to stay open, new businesses to open, all businesses to thrive, and heritage buildings to be renovated.
  - Good management, leadership and vision at Community Board, Local and Central Government level.
  - Forward planning to support ongoing development, including the new hospital (and associated businesses).
  - Continual improvement Ōtepoti Dunedin has come a long way but can still learn from cities which have managed development well (and not).
  - Well-managed, controlled, and sustainable growth. Residents want to see 'investment' in new people, businesses, job opportunities, housing, and places in Ōtepoti Dunedin, but they do not want to live in a crowded, overpopulated city.
  - Quality / affordable housing.
  - Diverse economic base/sectors.
  - High quality, skilled jobs (in a range of sectors).
  - Protection of special and historical places.
  - Developing and maintaining inner city green spaces.
  - Development of the harbour.

# 2. Building a confident, positive, vibrant, modern, connected and thriving city with a soul

- A small-town community feel, where the friendliness and character stays.
- A 'smart', more digitally connected and technically advanced place, especially for younger and business-focused residents.
- A diverse and inclusive society.
- A wide choice of activities, events, facilities, amenities.
- A thriving business sector.
- A spread of industries and employment opportunities.
- A positive and proactive destination for visitors and one which encourages youth to come and stay.
- · Being proud of Ōtepoti Dunedin and its unique character.
- · History and architecture are maintained.
- An exciting entertainment and cultural hub and less focus on the party/drinking culture.
- A revamped main street and a city centre with more to do (to attract more visitors and foot traffic).
- A stronger link with and promotion of Ōtepoti Dunedin's education (University) connections; the Oxford or Cambridge of New Zealand.
- A stronger focus on the arts and promoting Ōtepoti Dunedin as an art destination, with world renowned shows, galleries, events, promoting local and international art.

"...I really admire the university and like what you said about thinking about it as a Cambridge or Oxford town. I think that's really inspiring. I'd like my daughter, you know, when she's there, you know, through life to have that university feeling of Dunedin and I'm really proud of it to on the world stage." (Otago Peninsula)



# QUALITATIVE PERSPECTIVES ON ŌTEPOTI DUNEDIN

## On the Best Possible Future for Ōtepoti Dunedin (continued)

#### 3. Community consultation and engagement

This should be inclusive, and planning informed by local knowledge and people who care about their communities

#### 4. Environment and climate change prioritised

- Sustainability, biodiversity, nature, and wildlife are at the forefront of all planning and development
- Renewable energy and low/no carbon options are championed and prioritised
- There is less rubbish and pollution
- Immediate action/planning for South Ōtepoti Dunedin; a clear plan.
- A bustling, sustainably focused city, fantastic waterfront, lots of things going on, trains and railways not just used for freight

"And someone mentioned like being cleaner, like I think, even just George Street, they could do so much more on George Street as a main shopping street. Even if the buses were electric, so they weren't spitting out like exhaust every 10 minutes when they go past it would just be so much more enjoyable" (Rangatahi)

"Also. I'd like to see a managed in South Dunedin or at the very least like some sustainability around that because we had flooding in 2015, that was mismanagement, but it's also environmental concerns."

(Rangatahi)

The Destination Management Plan must be community lead and focused, with a fair allocation of wealth / resources." (Mana Whenua)

"Wildlife, albatross, hoiho, want to see everything that we have now. Plenty of green spaces in the city itself (town belt is a really special area - make sure that stays as the city inevitably grows). Architecture conservation, keep our old buildings, a point of difference. Housing solutions - need to get onboard with the going up not out, to keep our green spaces and wildlife, a bit of a mind shift needed. Food security - no market gardens left now, need to take food security seriously, don't build on productive land, be selfsufficient within our local area (especially given connections can get cut off). Community gardens, food planting. Personal safety and security. Accessibility for older people and disabled. Shops for older people not just young people. Keeping road/air connections open. An education/academic center. Parks/spaces for families and children. Sustainable transport, cycleways, shared pathways." (Waikouaiti)



# QUALITATIVE PERSPECTIVES ON ŌTEPOTI DUNEDIN

## The Inverse: Fears for Ōtepoti Dunedin's Future

In reflecting on the future, and what might be a worst possible scenario for Ōtepoti Dunedin, residents focused on two main themes.

- 1. Inaction and/or a lack of foresight and planning that impacts Ōtepoti Dunedin's character, local businesses, and infrastructure development
  - Profit motivated; small businesses may be driven out and replaced by chain stores, everything with no character or soul.
  - An outsourced economy, resulting in more low-value jobs, more poverty and associated social problems.
  - Local voices ignored, meaning there is no local input and no sense of belonging and inclusivity.
  - Progress thwarted by bureaucracy, local politics, red tape, nimbyish people 'feathering their own nests' at the expense of the community.
  - Infrastructure not keeping pace.
  - Ōtepoti Dunedin stagnating.
- 2. Uncontrolled growth / poor urban design / cookie cutter houses

Some have a vision of Ōtepoti Dunedin as an over-populated and dirty concrete jungle with expensive and unaffordable housing, more poverty, homelessness, more (youth) crime, poor mental health, and other social problems.

"That Dunedin doesn't progress (building a new hospital but region needs modernization/doesn't look 'go ahead'), hope it continues to be a progressive and important city. Campus needs updating, need to keep that attraction for the students who bring money here, losing them would mean economic loss. Lost opportunities for creative sector." (Central)

"Because, you know, and even in 2070 is going to look nothing like what that looks like now, you know, the tides coming in, the oil's running out and where we are here, so it's going be way different, but it has to be, and this is the point is here, we are here at the point where we decide what we want to do, whether we want to just charge on the same way we've been going or start putting things into place now. So green spaces, sustainable environment. And for me, just talking for me, um, considered, um, visitor management in terms of numbers considered visitor management, because just, you know, getting more people through is it's not working for us as a community. It's not actually working long term for tourism as a community, as an industry because, the more people, the bigger, the impact and it changes what's there.

You know, we all know that." (Mana Whenua)

"Vogel street, that's progress but downside is potential loss of interesting creative things. Empty spaces/buildings. Demoralizing to see empty streets/buildings." (Waikouaiti)

"Lots of great ideas but it's the execution that's the problem. Ideas good but things need to happen. Lots of people love what's here, has a great future."

(Waikouaiti)

"Dunedin has lost its international appeal (lost airline connection), risking being out on a limb down here, unless we do something to attract more tourists. Have become second fiddle to Christchurch (when they build their stadium will be even worse). The whole country has become unwelcoming to tourists, Dunedin especially vulnerable." (Waikouaiti)





## VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# SUMMARY: VIEWS ON TOURISM IN ŌTEPOTI DUNEDIN

#### **Tourism Engagement**

With one-in-five survey respondents working in paid employment in the tourism sector, Ōtepoti Dunedin's community survey sample contains a higher proportion of people employed in tourism than is found in a New Zealand-wide population sample (9%). It also contains larger proportions of people engaged with tourism in other ways: from casual interaction with visitors, to participation in public consultation or planning processes that affect tourism in the region.

It is not surprising that research relating to tourism attracts the attention and participation of people with a particular interest in the subject matter. It does mean that the findings will reflect the views of those in the community most aware of tourism in Ōtepoti Dunedin and potentially most affected – positively or negatively – by the way in which tourism develops in the future.

#### Views on International and Domestic Tourism

Almost 90% of residents see international (inbound) tourism as a force for good, both at national (for New Zealand) and regional (for Ōtepoti Dunedin) levels. Even higher proportions see domestic tourism as good for the country and their region.

At the same time, almost 40% of Ōtepoti Dunedin residents believe that international tourism places too much pressure on their region, and almost 20% believe that domestic tourism does likewise.

These findings underpin regional Tourism Approval Ratings of **38 for international tourism** (which is broadly in line with the New Zealand average of 39 but well above the Otago regional average of 29) and **71 for domestic tourism** (above the New Zealand average of 62 and Otago regional average of 56).

From these findings we can conclude that while tourism is highly valued by residents of Ōtepoti Dunedin, there are concerns about the impact that it currently has on the region.

#### Relative Importance of Tourism

Tourism (including Accommodation and Food Services), is seen as the most important sector of Dunedin's economy by 16% of residents, putting it third in ranking behind Education and Training (55%) and Health Care and Social Assistance (28%).

Furthermore, more than half of Ōtepoti Dunedin residents who work outside of the tourism/accommodation and food services sector - for example, in retail trade, construction, financial services and education - believe that the region's tourism activities and recreational assets are important to the success of the sector in which they work.

#### Benefits of Tourism

Residents indicate that tourism provides a raft of economic, social, cultural and environmental benefits for Ōtepoti Dunedin. Most significant amongst these are the support that tourism provides for local businesses (more businesses are able to open, or stay open) and tourism's contribution to community vibrancy.

Just 10% of residents have NOT benefited from tourism in their area (well below the New Zealand average of 24%).

## Tourism's Adverse Impacts

At the same time, 80% of residents indicate that they have experienced some negative impact of tourism in their area (well above the national average of 65%). Most commonly these impacts relate to litter and waste, carparking and traffic congestion, damage to the natural environment and pressures on community infrastructure.

Based in part on korero in the discussion groups, cruise is seen as a key contributor to environmental impacts (including marine pollution and coastal erosion) and pressures on community infrastructure (including roading, public transport, public toilet and waste management facilities).



# VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# **SUMMARY (CONT.)**

#### Mitigation of Adverse Impacts

While in many instances residents acknowledge that action is being taken to mitigate the adverse impacts of tourism, there are some areas in which it is thought that further action is needed. More than 10% of residents believe that further action is needed on carparking; almost 10% believe that further action is needed to address the generation of litter and waste, and damage to the natural environment.

#### On What Should the Industry Focus?

Given these concerns, it is not surprising that residents of Ōtepoti Dunedin would like to see a greater focus on improving community infrastructure and encouraging visitors to adopt more sustainable travel practices. Indeed, both are significantly more important to residents of Ōtepoti Dunedin than to residents of other regions in which similar research has been undertaken.

Ōtepoti Dunedin's residents would also like their local tourism industry to focus on attracting more domestic visitors, attracting higher value visitors, reducing the carbon footprint of visitors, creating employment for people in their community and encouraging visitors to travel more widely within the region so that more communities benefit. (The latter was also an important theme in the discussion groups undertaken earlier in Middlemarch and Waikouaiti).

Relative to New Zealand norms, Ōtepoti Dunedin residents are also more likely to call for efforts to reduce the impact of visitors on their local environment, to involve visitors in the regeneration of their local environment, and to develop/promote more authentic and/or indigenous experiences for visitors.

## **Priority Impacts**

When asked to prioritise tourism's potential impacts for planning purposes, residents identified economic and environmental impacts as of greatest importance (allocating 28 and 27 of a total 100 points respectively).

#### Risks

When considering the potentially adverse impacts of tourism, Ōtepoti Dunedin residents identified a number of risks associated with tourism development. From varying perspectives, these related to: -

- Failures to plan or invest appropriately in the connectivity/infrastructure/ facilities that are needed.
- · Changing the character of Ōtepoti Dunedin.
- Excluding by pricing out or by crowding out local people from valued activities and attractions.
- Too few visitors, or alternatively too many (eroding the quality of the visitor experience and impacting the environment).

## Visitor Experience

Two-thirds of Ōtepoti Dunedin's residents believe the quality of the current visitor experience is either 'good' or 'excellent', noting that there is a lot to see and do in the region, it is unique as a destination, and that established tourism operators are doing the region proud.

At the same time, a significant proportion (almost 30% of residents) characterise the visitor experience as 'average', attributing this to poor or indifferent service, a lack of progress/new development in recent times, and poor maintenance of some local facilities and infrastructure.

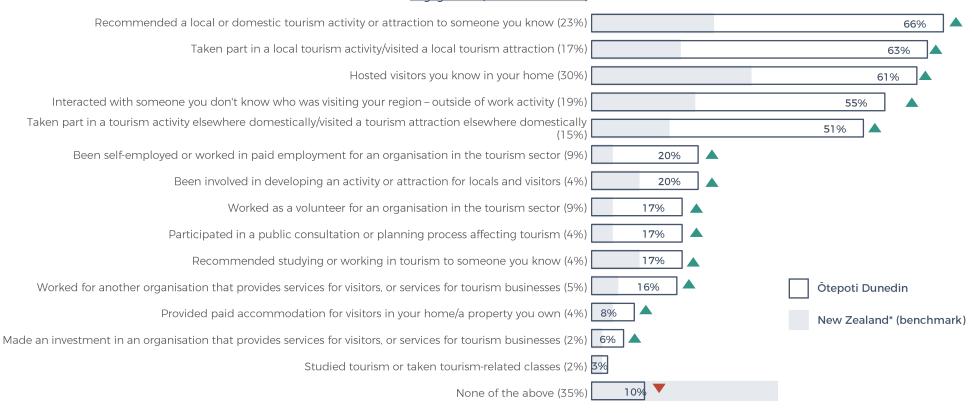
Some residents believe the region simply has little to offer visitors. Given the role that locals play as advocates for the region, this suggests there is both an opportunity and a need to address the local market and to build awareness of all that the region has to offer and, in doing so, to engender a sense of pride.



# **CURRENT TOURISM ENGAGEMENT**

Which of the following have you personally done in the last two years (if any)?

#### **Engagement (% of New Zealand)**

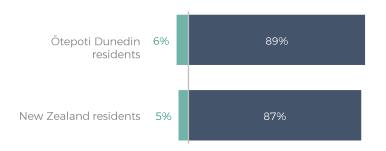




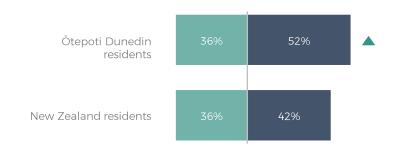
# INTERNATIONAL TOURISM

Thinking about international tourism (i.e. international visitors coming to New Zealand) to what extent do you agree or disagree with each of the following...

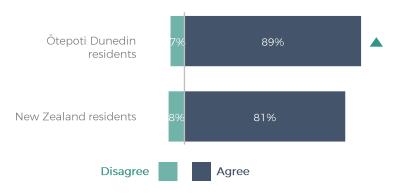
## International tourism is good for New Zealand



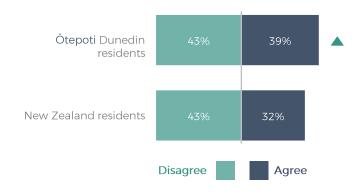
## International visitors are putting too much pressure on New Zealand



## International tourism is good for my region



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

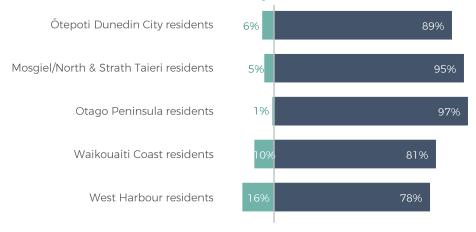


Base: Dunedin residents (n=478)

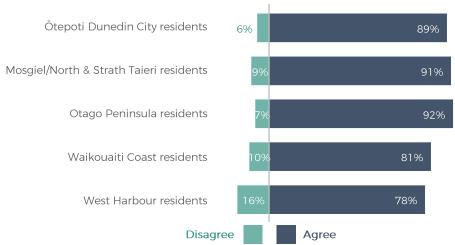
# VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# INTERNATIONAL TOURISM

## International tourism is good for New Zealand



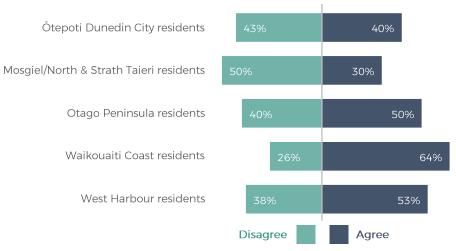
## International tourism is good for my region



## International tourism is putting too much pressure on New Zealand



## International tourism is putting too much pressure on my region

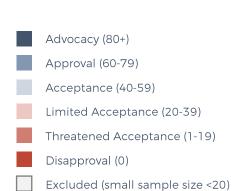


Base : Ōtepoti Dunedin residents (n=478)

('neither agree nor disagree' and 'don't know' responses not shown)

# VIEWS ON TOURISM IN ŌTEPOTI DUNEDIN

INTERNATIONAL TOURISM APPROVAL RATING





Dunedin sub-area	TAR Score
Ōtepoti Dunedin City (and inner suburbs)	38
Mosgiel / North Taieri & Strath Taieri	47
Otago Peninsula	34
Waikouaiti Coast	14
West Harbour	19



Otago Inbound TAR:

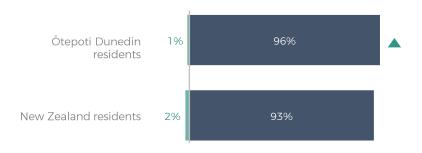
Dunedin Inbound TAR:



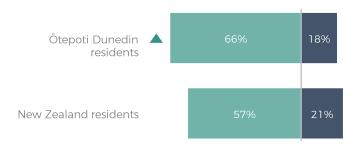
# **DOMESTIC TOURISM**

Thinking about domestic tourism (i.e. New Zealanders travelling within New Zealand) to what extent do you agree or disagree with each of the following...

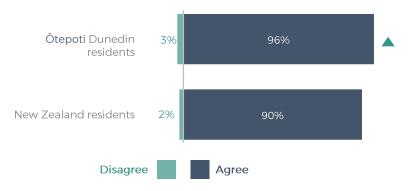
#### Domestic tourism is good for New Zealand



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

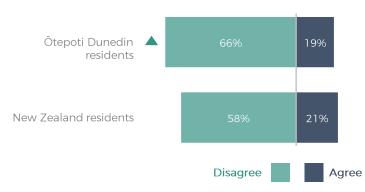


## Domestic tourism is good for my region



vs New Zealand residents at the 95% confidence interval

# Domestic visitors are putting too much pressure on my region

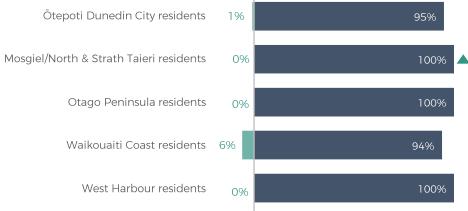




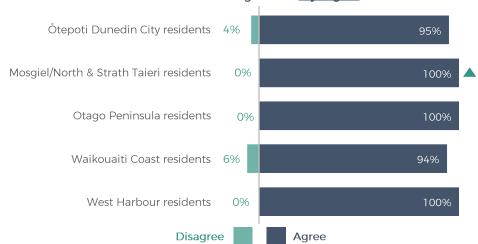
# VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# **DOMESTIC TOURISM**

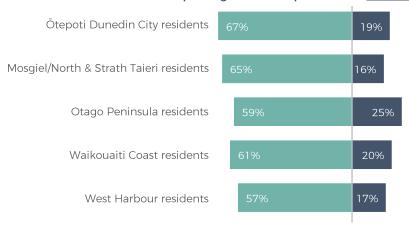
# Domestic tourism is good for <u>New Zealand</u>



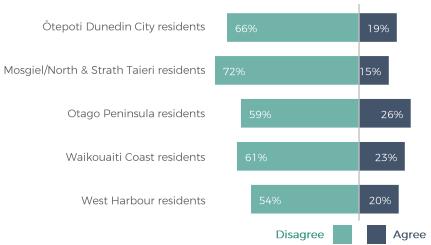
# Domestic tourism is good for my region



#### Domestic tourism is putting too much pressure on New Zealand



## Domestic tourism is putting too much pressure on my region



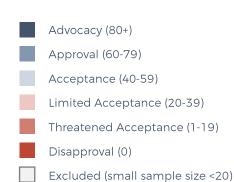
Base : Ōtepoti Dunedin residents (n=478)

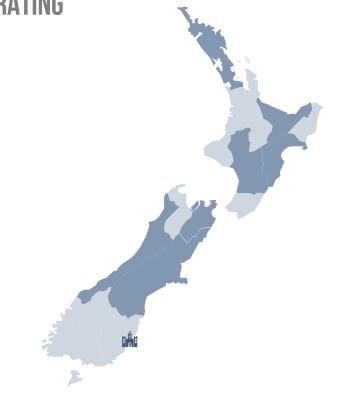
Base: NZ Residents (n=3,164) from A&A Views on Tourism Programme YE Sep 2022 ('neither agree nor disagree' and 'don't know' responses not shown)



# VIEWS ON TOURISM IN OTEPOTI DUNEDIN

DOMESTIC TOURISM APPROVAL RATING





Dunedin sub-area	TAR Score
Ōtepoti Dunedin City (and inner suburbs)	70
Mosgiel / North Taieri & Strath Taieri	77
Otago Peninsula	67
Waikouaiti Coast	64
West Harbour	69







# **RELATIVE IMPORTANCE OF TOURISM**

In your opinion, which if the following sectors are the most important to Ōtepoti Dunedin economy currently? And in the future (perhaps in 20-30 years time)?

## RANKED AS #1 MOST IMPORTANT SECTOR TO DUNEDIN ECONOMY

**CURRENTLY** IN THE FUTURE **Education and Training** 55% 42% Health Care and Social Assistance 28% 30% Tourism / Accommodation and Food Services 16% Construction 16% 13% Electricity, Gas, Water and Waste Services 14% 13% Retail Trade 9% 13% Arts and Recreation Services 12% 10% Administrative and Support Services 11% 6% Public Administration and Safety 10% 15% 9% Mining 2% Rental, Hiring & Real Estate Services 7% 17% Information Media and Telecommunications 7% 15% Professional, Scientific and Technical Services 7% 10% 5% Manufacturing 14% 4% Agriculture, Forestry and Fishing 12% 4% 3% Transport, Postal and Warehousing Financial and Insurance Services 3% 18% 6% Wholesale Trade 0% Other sector\* 11% 32%

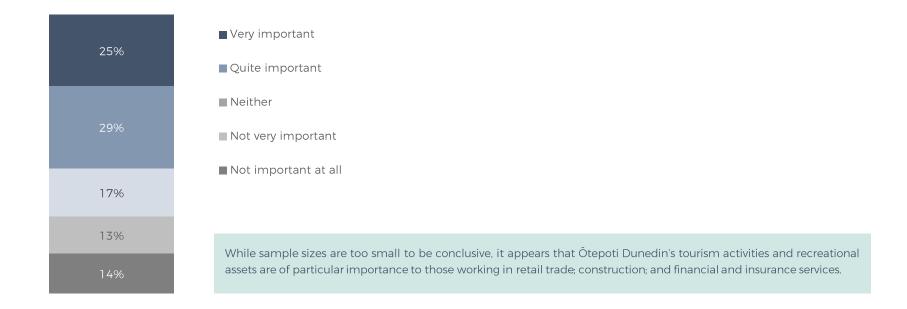


# IMPORTANCE OF TOURISM TO OTHER SECTORS

How important would you say that Ōtepoti Dunedin's tourism activities and recreational assets are to the success of the sector in which you work (e.g. because of the visitor expenditure or other activity that they bring; because they attract people to live and work in the region)?

**54**%

of Ōtepoti Dunedin residents who work outside of the tourism industry (i.e. not in tourism, accommodation or food services) believe that Ōtepoti Dunedin's tourism activities and recreational assets are important to the success of the sector in which they work





# **BENEFITS OF TOURISM**

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

#### Benefit (% of New Zealanders who have experienced benefit) More local businesses opening, or being able to stay open (39%) 52% My/our community is a more vibrant and friendly place to live (22%) 50% Has encouraged a greater appreciation of our historic buildings and sites (20%) 47% Opportunities to get involved with/attend local festivals and cultural events (22%) 46% Opportunities for employment/income (35%) 43% Has encouraged a greater appreciation of our natural environment (23%) 43% A greater variety of goods and services being available than otherwise would be (23%) 35% Has enhanced the profile or identity of my/our area (21%) 31% Improved services for my/our community (22%) 28% Has inspired me/us to travel domestically (26%) 27% Opportunities to learn more about other cultures (20%) 22% Has encouraged more sustainable behaviour in my/our community (12%) 19% Improved quality of life (17%) 18% Has inspired me/us to travel internationally (12%) 17% **Ötepoti Dunedin** Has given me/my family a greater sense of belonging to our community (12%) 17% New Zealand (benchmark) Improved transport services/transport developments (15%) 16% Opportunities to learn more about my/our own culture (12%) 16% Has increased awareness of climate change in my/our community (9%) 13% Other (0%) 0%

10%



None of these - I/my family haven't benefited from tourism in our area (24%)

# VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# **ADVERSE IMPACTS OF TOURISM**

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

""We are all impacted by the cruise ship visits. They are an environmental disaster, they don't take responsibility for the

damage they cause, and

they exploit their staff."

# Negative impact (% of New Zealand who have experienced impact)



More crime (13%)

Other (1%) 2%

Fewer services for local residents (5%)

Reduced sense of personal safety (9%) 4%

Changes in the character of my/our community (6%)

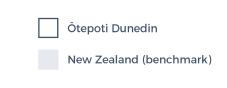
Reduced sense of belonging in my/our community (4%)

Disintegration of local culture, traditions and/or language (4%) 5%

7%

**7**%

"We have particularly enjoyed being able to walk to and from school past the bottom of Baldwin Street for the last 2.5 years without my children and I having to breath in the fumes of multiple tour buses parked idling on North Road, and without having to negotiate our way through hordes of tourists who aren't even looking with their eyes, only their phones. I would be really happy if the tour buses never came back, they provide nothing good for our community."





None of these - I/my family haven't experienced any adverse impacts of tourism in our area (35%)

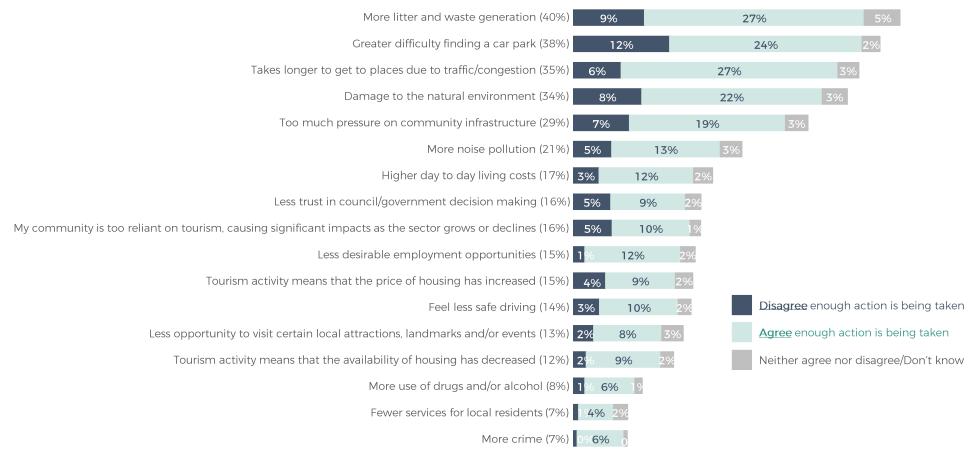
20%

# VIEWS ON TOURISM IN ŌTEPOTI DUNEDIN

# **SUFFICIENT ACTION TO MITIGATE IMPACTS?**

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 taken to address these...

#### Negative impact (ranked by prevalence)





# VIEWS ON TOURISM IN ŌTEPOTI DUNEDIN

# **IDEAS FOR MITIGATING ADVERSE IMPACTS**

[Asked of those negatively impacted by tourism activity and who disagree that enough action is being taken to address these] What more do you think could be done?

"Stopping cruise ship entry - climate change is our nuclear-free moment."

Different types of visitors have different emission profiles. We should be disincentivizing frequent jet setters with short stays."

"It's not just a tourism issue. We need better infrastructure to segregate cars, pedestrians and bikes. Need better public transport to tourists don't have to drive. Buses are ok if drivers are properly trained and not excessive numbers."

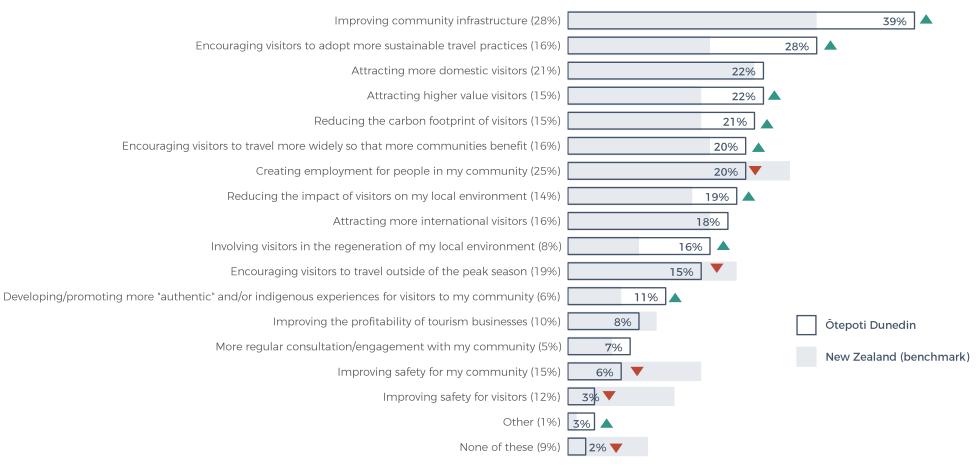
"Have lower rates and entrance fees for locals. Or an annual Dunedin activity card/membership which gets you lower rates to local attractions. For inspiration look at the 'wild card' initiative in South Africa."



# **DESIRED TOURISM FOCUS**

On which of the following would you like your local tourism industry to focus most in the future? Please select up to three options

## Future focus (% of New Zealanders who selected focus)





# **TOURISM IMPACT PRIORITIES**

Following are four areas in which action could be taken to ensure that tourism has positive impacts. To help in prioritising action plans, please tell us how important you think each of these is by allocating a total of 100 points between them.





27%

TOURISM IMPACT PRIORITIES

## A positive impact on the environment

(e.g. building understanding and an appreciation of the natural environment; contributing funds for conservation; encouraging volunteer activity such as tree-planting; creating demand for active transport)



(e.g. providing new and enjoyable experiences for locals and visitors; providing opportunities for recreation and physical/mental health benefits; encouraging cross-cultura exchange; providing opportunities to learn new skills)



#### A positive impact on communities

(e.g. creating amenities, services and events for local people to enjoy; building vibrant communities; generating local pride)

### VIEWS ON TOURISM IN OTEPOTI DUNEDIN

## RISKS ASSOCIATED WITH TOURISM DEVELOPMENT

And considering the potentially adverse impacts of tourism, what are the greatest risks that you see in future development of tourism in Ōtepoti Dunedin (if any)?

#### Poor Decision-Making

Decisions based around tourism need to be evidence based and use international experience, this evidence needs to be communicated to businesses and councils. Need a joined-up approach e.g., if parking is centralized, then shuttle buses for those with reduced mobility, better public transport, easy opportunities to hire bikes, e-bikes and scooters"

#### Poor Connectivity/Infrastructure/Facilities

"Dunedin being left behind due to poor inbound and outbound access. Lack of quality regards hospitality - both facility and experience. Nothing but Eco tourism." as real attractions."

"Locals who want Dunedin to stay in the dark ages and have no progress."

"Poor public transport service and parking facilities."

Our biggest risk is no international flights and/or losing domestic flights. I believe we need to focus on our strengths and not waste money/resources trying to be something else. Dunedin Domestic tourism is strong, and we want to be a mecca for international tourism so no need to try and be one. Instead attract quality tourists and focus on given them amazing time - i.e., not mass tourism."

#### Too Few Visitors

"The greatest risk is that we get fewer international visitors because of the carbon cost of travel. At the same time domestic travel may decrease as those kiwis with the resources seem to be heading overseas post covid. Covid did raise awareness of what we have here in NZ, and we need to continue to promote what is different about Ōtepoti - basically our wildlife, our scenic values and the proportion of historic buildings."

#### Changing Character of Ōtepoti Dunedin

"Selling our soul -- e.g., with the kind of large intrusive hotels of dubious architectural merit (and actually mostly apartments) as proposed in recent past that are completely out of sympathy with the natural and built environment."

"Dunedin losing its romanticism, it's University town culture (international students), being branded as 'white'"

#### Over-Promising

"That it will a boring campaign to invite people here to see we have crap facilities that we don't care about - look at the dinosaur park - where are the dinosaurs people come here think it will be an awesome destination playground and are underwhelmed."

#### Narrow Focus / Over-Reliance on Tourism

"Our addiction to cruise ship visits. We should take on board research from Otago Uni about their very detrimental environmental impacts. Prof Higham and other staff are experts in this. Also wages in tourism are low, and jobs are very insecure."

"We can't afford to have all our eggs in one basket - e.g., we can't rely too heavily on cruise ships and allow them to dictate the opportunities and services on offer"

### One-Dimensional (European) Focus

"More disengagement of Kai Tahu and our hapu. So much is white people's heritage which is frustrating as that's not what international visitors want to see. It's the natural environment and our cultural heritage. I'd also think that a significant risk is the lack of appropriate funding for our community sector, which has always been chronically underfunded. How can our nfp's continue into the future if tourists receive an underfunded service?"



### VIEWS ON TOURISM IN OTEPOTI DUNEDIN

## RISKS ASSOCIATED WITH TOURISM DEVELOPMENT (CONT.)

And considering the potentially adverse impacts of tourism, what are the greatest risks that you see in future development of tourism in Otepoti Dunedin (if any)?

#### **Business Impacts**

"Forgetting how important tourism is for Dunedin to stay globally connected to other places, people and business opportunities."

"Properties converted to short stay rentals e.g., Airbnb drive up housing prices for locals and undercut professional accommodation providers."

"Tourism industry must be independent and commercially viable to support investment and growth."

#### Planning and Leadership

"The current Dunedin mayor and council. They have done all they can to destroy Dunedin city centre as a place to visit. Their abandonment of the Taieri Gorge railway has been a disgrace. Their championing of cycling over all else has led to shared pathways being dangerous for pedestrians. Their incompetence in sorting St Clair beach is legendary. If they (and many of the council staff) continue as they have been doing Dunedin will not be worth visiting, if indeed you can get here."

"Repeating the mistakes of the past in allowing non-sustainable tourism practices to continue and continuing the over-reliance on a narrow range of tourism ventures, which may or may not prove to be sustainable in the longer term."

#### Excluding / Pricing Out Locals

"Pre covid, the amount of tourists was driving locals out of the city and local attractions, this doesn't work for 2 reasons 1, business struggles in the off season making it hard to retain staff. 2. I used to work in tourism and one thing that the overseas tourists asked was "where are the NZ'ers, we would like to talk to one", if we are to bring people here, we need to make it real for them."

"A return to pre-Covid numbers of cruise visitors who create waste the city has to deal with. Individuals & businesses profit but expenses are paid by the public."

"Exclusion of local people from any benefits of tourism (and potentially increase in costs as a result - Queenstown is a prime local example of how tourism utterly fails the community). "

"When we had high international visitors, we found we were strangers in our own country. Lining up in a shop and only hearing foreign languages. Poor driving skills and habits. Some international visitors going through NZ on the cheap, sleeping in cars vans on the side of the road."

#### Too Many Visitors Eroding Quality of Experience and Impacting Environment

"Attractions become overcrowded, visitor experience is diminished, and natural environment suffers."

"We must use this opportunity to create tourism opportunities that have a positive effect on the city and its biodiversity rather than just trying to minimize impact."

"Waste and impact on environment, promote regenerative tourism Also, not embracing it enough! i think greater tourism, particularly domestic tourists would encourage more businesses and make Dunedin a more exciting place to live."

"Exploiting & damaging our natural resources, e.g., wildlife and vegetation."

"Too many people here at one time. Freedom camping in places where it is not appropriate. Rubbish and human waste not being disposed of properly. Tourists not appreciating our biculturalism. Tourists not respecting wildlife."

"The spread of the city across the valuable farmland of the Taieri Plains."

Killing the golden goose - too many people will change the nature of Dunedin. Too many visitors will make a farce of the un-spoilt and remote beauty parts of Ōtepoti and jeopardize the environments needed for wildlife breeding etc.



## **QUALITY OF VISITOR EXPERIENCE**

Based on what you know or have observed, how would you rate the quality of the experience that visitors currently have in Ōtepoti Dunedin?

**65**%

of Ōtepoti Dunedin residents rate the quality of the current visitor experience in Ōtepoti Dunedin as either good or excellent. Almost 30% characterise the quality of experience as average and a small proportion, as poor.

"But the authenticity, pride, and innovation/flexibility of current operators/hosts are real strengths."

■ Excellent

Good

Average

54%

Poor

Extremely poor

Visitors are thought to have an excellent or good experience because:

- Ōtepoti Dunedin exceeds their expectations
- · There is a lot to see and do
- It is a unique destination
- Established tourism operators do a fantastic job

Visitors are thought to have a poor or extremely poor experience because:

- There are limited offerings (not much to do)
- There has been little progress or development in recent times
- They experience poor or indifferent service
- The harbourfront is inaccessible / lacking
- Maintenance of some local facilities and infrastructure is poor.

Visiting family and friends are always surprised by how much there is to see and do - and how beautiful it is here."

"Have you been to Dunedin recently? Have a walk on St Clair esplanade and go down the steps to the beach; if you don't break a leg, you might enjoy the view of an eroding beach covered with boulders left be DCC. Have you tried shopping in Dunedin. The traffic is so badly organized that it takes 25 mins to cross New World car park. The place is a disaster."

""Know for a fact that tourists find it terribly lacking that Dunedin has no waterfront destinations in town. The esplanade has terrible beach access, not enough parking, and nothing but a few mediocre cafes which are usually overcrowded. It baffles visitors that the harbour is nothing but a warehouse precinct, when it is so beautiful and screaming to be home to a boardwalk, shops, eateries, and attractions - such as an aquarium. Locals would flock there even if we had no tourists. The Octagon and George Street are dying - no anchor stores in the mall and soon limited car access. Dunedin needs a harbour front destination."



28%

2%

VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# **QUALITATIVE PERSPECTIVES ON TOURISM IN ŌTEPOTI DUNEDIN**

"And look at how locals have been impacted in Qt ... can no longer afford to live there ... reinforces importance of a community focus." (Middlemarch)

#### On Tourism Now

Some residents associate Ōtepoti Dunedin with older, middle aged and well-heeled travelers and cruise passengers (and don't see the city as a destination for families or young people). Others recognise that students encourage visiting family and friends, and in that sense, the city is attractive to younger visitors.

Most residents described Ōtepoti Dunedin as a destination for everyone and everybody, from "wealthy golf playing elite" to backpackers, concert goers, parents of students, business travelers, sports fans and hospital rebuild staff. Visitors are seen to come from all age groups and demographics, from around New Zealand and the world. Most are valued and welcomed if they respect Ōtepoti Dunedin and "follow the rules"

At the same time, Ōtepoti Dunedin residents acknowledge they need to treat visitors respectfully, as guests, and appreciate the time and effort they have made to visit. Also, to be thankful for the money visitors inject into the economy and businesses, the jobs they support, and the life, culture, and vibrancy they bring to the city.

One resident noted that she felt ashamed of the way Ōtepoti Dunedin greeted visitors, including cruise passengers, and felt this is not how people should treat guests to their city and country.

"Visitors should be willing to spend money ... according to their means ... or otherwise feed back into the economy in some other way ... culturally, interacting, and sharing somehow." (Otago Peninsula) Some residents observes that visitors to Ōtepoti Dunedin do not spend much time in the city and did not stay the extra day or two after a concert or event to explore the surrounding area.

Others felt Õtepoti Dunedin is somewhat of an afterthought; tacked on to a trip to Queenstown or around the South Island, rather then a destination in itself. This is disappointing and something which they hope will be addressed when planning for a more sustainable and 'slower' tourism future.

#### On the Benefits of Tourism

A minority see potential benefits for Ōtepoti Dunedin residents if there are no visitors at all. This is akin to turning back the clock for older residents to a time when community spirit, caring for each other, and working collectively and collaboratively were the norm.

Others with this view believe that tourism has had detrimental impacts on local communities and towns in other places, including Queenstown, and do not want Ōtepoti Dunedin to 'suffer the same fate'.

"t's hard for me to say because, um, I grew up in the fifties and sixties when there was nothing and life was beautiful all the time." (Otago Peninsula)

"Maybe not all bad ...we think there'd be more, uh, community focus, you know, so using the resources, what we've got here and making, making them go a bit further. Um, and, and that would possibly, you know, that might counteract a bit of a loss of quality of life, style, and life, if we could, um, balance that with communities, um, helping each other out. Right. Yeah. Um, connection. But you know, it's, it's, there'll be a breakdown of the way we basically live really." (Otago Peninsula)



### VIEWS ON TOURISM IN OTEPOTI DUNEDIN

# **QUALITATIVE PERSPECTIVES ON TOURISM IN ŌTEPOTI DUNEDIN**

#### On the Benefits of Tourism (cont.)

However, most feel that any potential negatives associated with visitors are far outweighed by the positive impacts they have. Indeed, such is the perceived value of tourism that, without visitors, many residents can envisage Ōtepoti Dunedin descending into a negative, downward spiral:

- · Becoming boring, quiet, less interesting, with less vitality and life
- There will be fewer facilities and amenities for local people
- There will be less nightlife, fewer cafes, bars, and restaurants
- There will be no concerts or large events and fewer cultural opportunities
- There will be less investment in the city and businesses will close down
- People will lose their jobs and move away
- Schools and other community services will close (without the population to support them)
- There will be no money for infrastructure development, so the city will get increasingly dysfunctional. South Ōtepoti Dunedin will be abandoned, and its residents moved on
- The absence of international students will have huge implications for the University. There will be no new people, no new ideas and thinking.

A further observation is that people will take less pride in their city and/or community if there are no visitors. Visitors, be it to your home or city, promote pride. Visitors also drive investment, improvements and help to raise standards above and beyond what local people expect and demand.

The following comments are illustrative of sentiment.

"Couldn't think of positives. Would miss random chats with tourists, learning about other people and their perspectives, learn about other cultures. Less jobs, less people, less vibrancy. Meet all sorts of people from different walks of life." / "Not being able to share Dunedin with others, we're proud of Dunedin, we'd be lonely, nice to share Dunedin with others. People are astounded at how beautiful it is." (Mosgiel)

"If no tourists, all gets very stale. Boil in own juices / become more inward looking.

We will lose connection to the outside world." / "Makes general population more excited about Dunedin." (Central)

"I think tourism and visitors are essential to Dunedin's survival. Was part of slow food movement, people would travel thousands of miles for authentic experiences, boutique experiences, Dunedin without visitors would be very quiet but need to think about what types of visitors we want. Want authenticity. Terrified our restaurants will close, growing/diverse/every changing cuisine would disappear - I'm thinking of myself. Lose diversity, new influences, adding new flavors and new things. If don't have people arriving won't grow. Holds us accountable as well, encourages us to change, protects our road connection." (Waikouaiti)

"Without students, Dunedin would be dead. (So, what is it like when the students go away?) I mean, it's empty. It's empty. Yeah. Yeah. I mean even how does that feel? Even this week? Its mid-semester breaks and it's empty." (Rangatahi)

"Their expectations are a lot higher. You've got a lot more, um, entitlement of people in the world and that word in hospitality, especially with the younger ones, their entitlements of coming and what they expect out of hospitality. They want higher quality and better coffee and more choice." (Otago Peninsula)



## QUALITATIVE PERSPECTIVES ON TOURISM IN ŌTEPOTI DUNEDIN

On the Benefits of Tourism (cont.)

"Less diversity -, like yeah. Like shops. Yeah. Um, and like, okay. I guess with diversity, I mean, you know, if someone comes in from, if someone was to arrive here from a foreign country and they're, oh, I wanna start up a restaurant with my cuisine, like that's diversity right there." (Younger)

"Well, it's just nice to meet some new people because this is your green, new town.

You walk past somebody, you know, they sometimes stop and talk to you, or you stop and talk to them, or they just say hi or whatever." (Middlemarch)

"....your house again, would you have to do the housework in the gardening?

Probably not. we sort of put on a show and we sort of give everything tidy and we make the city better. Actually, get out of your pajamas for the day." / "Lose all those things that kind of bring us joy." (Otago Peninsula)

"Miss opportunity for Dunedin people to show their pride in the place, would be strange, lose opportunity to tell stories about yourself. Not necessarily miss much personally, like living in small city. But wouldn't gain experiences that are developed (brings money in and investment - things we have happening wouldn't happen without visitors: e.g., Maintenance of heritage, protection of wildlife)." / "Would become stunted; visitors and tourists keep us competitive, tidy your house, show pride in yourself, keeps us competitive and to the top of our game, why bother vacuuming if no-one's coming. Visitors essential - lonely, quiet, less colorful, visitors are vital, isolating, Dunedin is still quiet, hasn't got that buzz, people are looking quite sad, if there's not the trade then more businesses will close." (Central)

"Incentive for council to tidy things up for visitors, wouldn't be as well maintained without visitors, encourages us to impress, have pride in environmental practices."

(Mosgiel)





## SUMMARY: CHALLENGES & OPPORTUNITIES FOR TOURISM BUSINESSES

And what do you believe will be the biggest opportunities for tourism businesses in Ōtepoti Dunedin over the next 10 years?

Forty-four respondents worked in tourism/accommodation/food services in Ōtepoti Dunedin (or approximately 9% of the total sample). Of these, eight were owners or managers.

It is perhaps not surprising as businesses look to rebuild post-COVID that the largest group of industry respondents identified 'increasing visitor expenditure' as the biggest **opportunity** for tourism businesses.

Others saw significant opportunity in collaboration – both within the sector and with other sectors – and gains to be realised from 'buy local' initiatives and development of cycle tourism in the Ōtepoti Dunedin.

Relatively few respondents identified NEW product/business development as a leading opportunity but those who did focused on cycle tourism; storytelling in relation to Ōtepoti Dunedin's culture and heritage; and food and drink experiences.

Top-of-mind in relation to **challenges** is workforce and the difficulties of attracting and retaining staff in a highly competitive labour market.

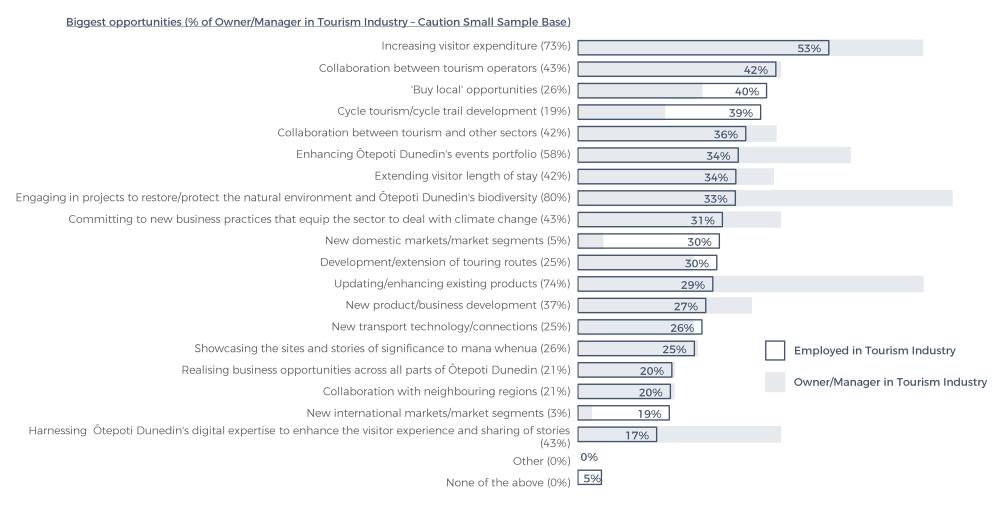
With a longer term view perhaps, adaptation to the impacts of climate change and managing the impact of tourism on the environment were both identified as major challenges for the sector; as was adaptation to meet changing consumer needs or expectations.

Opportunities	Тор	Challenges
Increasing visitor expenditure	1	Workforce/attracting and retaining staff
Collaboration between tourism operators	2	Impacts of <b>climate change</b>
'Buy local' opportunities	3	Managing the impact of tourism on the <b>environment</b>
Cycle tourism/cycle trail development	4	Uncertain market conditions
Collaboration between tourism and other sectors	5	Meeting changing consumer needs or expectations



# OPPORTUNITIES FOR TOURISM BUSINESSES IN ŌTEPOTI DUNEDIN

And what do you believe will be the biggest opportunities for tourism businesses in Ōtepoti Dunedin over the next 10 years?





# CHALLENGES FOR TOURISM BUSINESSES IN ŌTEPOTI DUNEDIN

What do you believe will be the biggest challenges that tourism businesses in Ōtepoti Dunedin will face over the next 10 years?

Biggest challenges (% of Owner/Manager in Tourism Industry - Caution Small Sample Base)





## NEW PRODUCT/BUSINESS DEVELOPMENT OPPORTUNITIES

What opportunities do you see for new product/business development?

Cycle Tourism is an area which is seeing significant growth and Dunedin only just scratches the surface in this area. We have a beautiful harbour which has very little interaction in terms of tourism product. The Monarch and Port to Port being the only two really. I would like to see the development of fun"" tourism product as well to support what I define as interesting product i.e., Heritage and wildlife attractions."

"Current visitor experiences are too staid and often take too long - e.g., Taieri Gorge railway is great for the gorge section but takes too long and then you have the return journey so do it all again. Visitors often want relatively short, high impact activities. This will also mean that more tickets can be sold as more outings can be done each day. I also don't feel we do enough to tell the story of our history - all cultures (Māori, European, Chinese)"

"Opening up more walks through properties, connecting land with food production, and more support for current events and festivals as these are usually produced with a lot of volunteer labor and little funding, these events if further supported in marketing resources would ensure that new products could be introduced and developed like the Farmers Market has done for food producers. People travelling want to meet the locals and interact with them."





# SUMMARY: ŌTEPOTI DUNEDIN'S TOURISM FUTURE

Overall, there is optimism and hope for a positive tourism future for Õtepoti Dunedin; one built on a diverse mix of visitors and a wide range of experience offerings.

#### **Must-Do Experiences**

According to residents, four out of six of Ōtepoti Dunedin's 'must-dos' for visitors relate to outdoor experiences and the natural environment: nature and beach experiences, wildlife experiences, scenic tours (harbour and land) and walking and hiking experiences.

Rounding out the top six are experiences of the region's heritage, and food and drink experiences. A close seventh is arts and cultural experiences.

Also identified as significant in Dunedin's visitor experience offering are cycling experiences, night sky experiences, meeting/interacting with local people, rural/small town experiences and engagement with mana whenua.

#### Ōtepoti Dunedin's Tourism Future - Key Concepts

Looking to the future, residents are most supportive of a tourism future for Ōtepoti Dunedin that is built on the following concepts (listed in order of support):

- 1. A place where education and lifelong learning are valued and celebrated
- 2. A place where visitors enjoy and learn about local wildlife
- 3. A global leader in conservation, where protecting biodiversity and the environment are top priorities
- 4. A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation
- 5. A place with a diverse and thriving food and drink scene
- A place with a full year-round calendar of sporting, arts, music, culinary and cultural events.

- 7. A place that celebrates early settler history and achievements, where visitors can explore old parts of the region and their heritage buildings/sites.
- 8. A place that celebrates the sites, stories and histories of significance to mana whenua
- 9. An inclusive society that celebrates diversity.
- 10. A place that invests in and celebrates creativity in all its forms.

These key concepts find broad support across all communities of Ōtepoti Dunedin, although emphases shift to some extent by community. For example, residents of Otago Peninsula, Waikouaiti Coast and West Harbour all elevate "a global leader in conservation" to first place in their thinking about the type of place they would like Ōtepoti Dunedin to be.

#### Aspirational Points of Difference

More generally, conservation and the environment feature large in residents' aspirations for the future and the unique points of difference they would like to see for Ōtepoti Dunedin in the year 2050.

As well as the traditionally acknowledged strengths of Ōtepoti Dunedin (wildlife and heritage), also prominent in thinking about future points of difference are a year-round calendar of events and the **character** of Ōtepoti Dunedin as a culturally vibrant, forward-thinking and inclusive place for residents and visitors.

### Realising the Vision for Ōtepoti Dunedin's Tourism Future

Feedback from residents indicates that realising the desired vision for Ōtepoti Dunedin's tourism future will demand greater commitment to conservation and the environment and efforts to protect biodiversity, drive down carbon emissions, deal with pollution, improve waste management practices, and adapt to climate change. It will also require a step-change in public transport and regional connectivity, and improved planning and development of core infrastructure across the region.



# MUST-DO EXPERIENCES IN ŌTEPOTI DUNEDIN

What do you see as the "must-dos" for visitors to Ōtepoti Dunedin?





## TOURISM FUTURES — KEY CONCEPTS



A place where education and lifelong learning are valued and celebrated



A place where visitors enjoy and learn about local wildlife



A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation



A place with a diverse and thriving food and drink scene



A place that celebrates the sites, stories and histories of significance to mana whenua



A global leader in conservation, where protecting biodiversity and the environment are top priorities



A place with a full year-round calendar of sporting, arts, music, culinary and cultural events



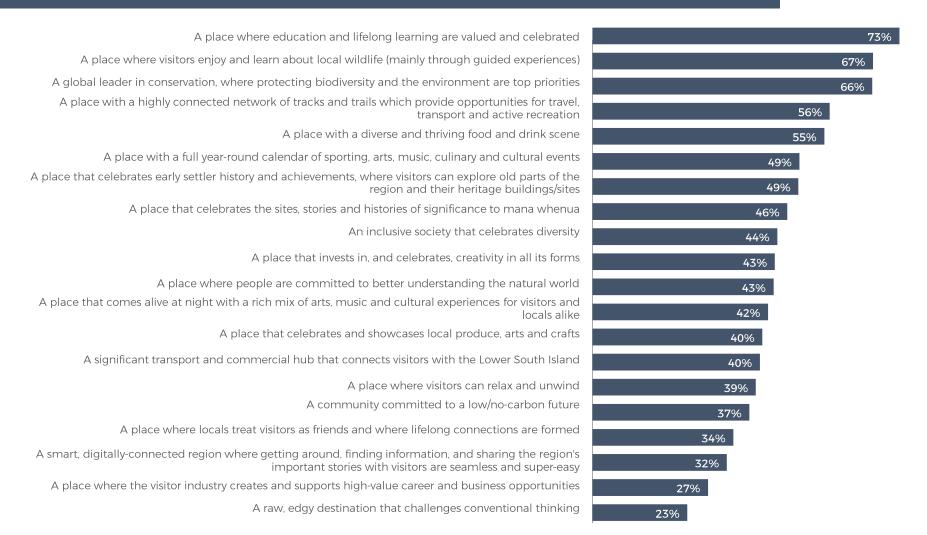
An inclusive society that celebrates diversity



A place that celebrates early settler history and achievements, where visitors can explore old parts of the region and their heritage buildings/sites

## TOURISM FUTURES — KEY CONCEPTS

Which of these concepts reflect the type of destination that you would like Ōtepoti Dunedin to be in the future?





# TOURISM FUTURES — KEY CONCEPTS (TOP 5 — ALL $\bar{0}$ TEPOTI DUNEDIN )

And which five would you say best reflect the type of destination that you would like Ōtepoti Dunedin to be in the future?



A place where education and lifelong learning are valued and celebrated



A global leader in conservation, where protecting biodiversity and the environment are top priorities



A place where visitors enjoy and learn about local wildlife



A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation



A place with a diverse and thriving food and drink scene



# TOURISM FUTURES — KEY CONCEPTS (TOP 5 BY AREA)

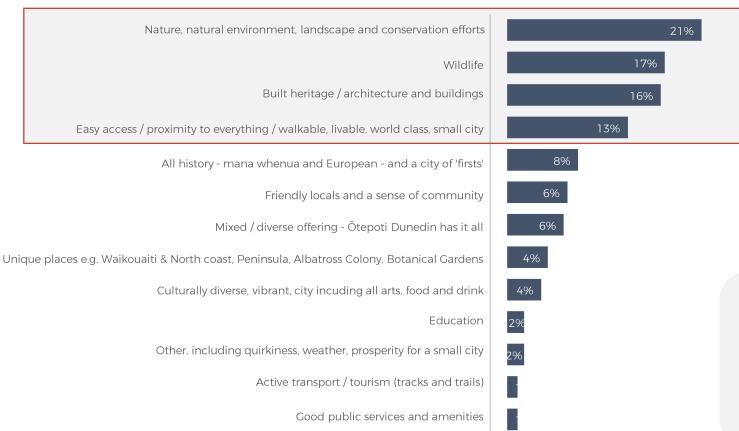
And which five would you say best reflect the type of destination that you would like Ōtepoti Dunedin to be in the future?

Тор	Ōtepoti Dunedin City and inner suburbs	Mosgiel / North Taieri + Strath Taieri	Otago Peninsula	Waikouaiti Coast	West Harbour
1	A place where education and lifelong learning are valued and celebrated	A place where education and lifelong learning are valued and celebrated	A global leader in conservation, where protecting biodiversity and the environment are top priorities	A global leader in conservation, where protecting biodiversity and the environment are top priorities	A global leader in conservation, where protecting biodiversity and the environment are top priorities
2	A global leader in conservation, where protecting biodiversity and the environment are top priorities	A place where visitors enjoy and learn about local wildlife (mainly through guided experiences)	A place where visitors enjoy and learn about local wildlife (mainly through guided experiences)	A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation	A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation
3	A place where visitors enjoy and learn about local wildlife (mainly through guided experiences)	A global leader in conservation, where protecting biodiversity and the environment are top priorities	A place where education and lifelong learning are valued and celebrated	A place that celebrates early settler history and achievements, where visitors can explore old parts of the region and their heritage buildings/sites	A place where visitors enjoy and learn about local wildlife (mainly through guided experiences)
4	A place with a diverse and thriving food and drink scene	A place with a full year-round calendar of sporting, arts, music, culinary and cultural events	A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation	A place where visitors enjoy and learn about local wildlife (mainly through guided experiences)	A community committed to a low/no-carbon future (including a zero-emission transport network)
5	A place with a highly connected network of tracks and trails which provide opportunities for travel, transport and active recreation	A significant transport and commercial hub that connects visitors with the Lower South Island	A place that celebrates early settler history and achievements, where visitors can explore old parts of the region and their heritage buildings/sites	A place where education and lifelong learning are valued and celebrated	A place that celebrates the sites, stories and histories of significance to mana whenua



# **ŌTEPOTI DUNEDIN'S UNIQUE POINTS OF DIFFERENCE**

And what is it that sets Ōtepoti Dunedin apart from other regions of New Zealand (or elsewhere) - what is the unique point of difference that Ōtepoti Dunedin has?



"Great things come in small packages. We have an amazing array of experiences within a short proximity of the city center. Cultural, historical, natural and even recreationally."

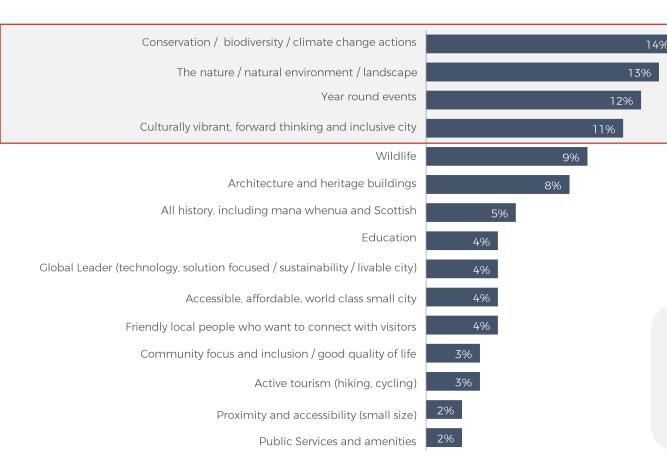
"The same way in which Dunedin's unique wildlife tourism was created (by those outside council) we could create similar experiences for music. Dunedin is world-renowned for the Dunedin Sound."

"Whether they're walking on city footpaths or offroad tracks, or waiting for a bus, Dunedin people
will say hello, and more often than not they will
strike up a conversation with total strangers. It's
local characteristic that people who move to
Dunedin from northern cities comment on and
enjoy. When Dunedin folk are out for a walk and
the person coming towards them doesn't even
make eye contact, we think "you're not from
these parts".



## POINTS OF DIFFERENCE TO ASPIRE TO

Earlier, we asked about Ōtepoti Dunedin's unique point of difference. Looking into the future, what do you think we should aspire to as a unique point of difference for Ōtepoti Dunedin in 2050?



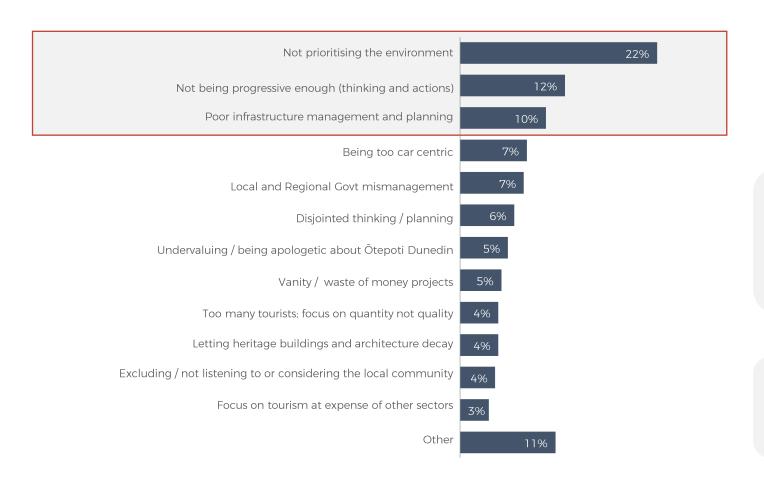
"Our proximity proposition and the ability to connect to so many experiences in such a short distance. This lends itself to being a fantastic walking/cycling city which in turns lends itself to connecting to the great rides and the regions."

"A place that is still unafraid to be different knowing that it is still choosing its own pathway to ensure a sustainable future for its entirety."

"A "slow tourism" destination where visitors stay longer for a deeper connection. more intensive community hub housing means pooling of resources and less commuting. keeping arable land for food production, halting urban sprawl. getting to grips with the fact that constant growth is unhealthy and unsustainable - need to strive for stability and sustainability."

## WHAT SHOULD WE STOP DOING?

To achieve this vision of the future for Ōtepoti Dunedin, what needs to change? What should we stop doing (that we're doing now?



"Constant arguments about how car-centered we should be. Get over it. You're dinosaurs. It's parochial and embarrassing. There are smarter ways to move around our beautiful city, and smarter designs."

"Just do the best of what you've got. Yeah. Make a change positive." (Middlemarch)



## WHAT SHOULD WE START DOING?

To achieve this vision of the future for Ōtepoti Dunedin, what needs to change? What should we ... start doing?

Promoting a unique, holistic, connected tourism offering / more

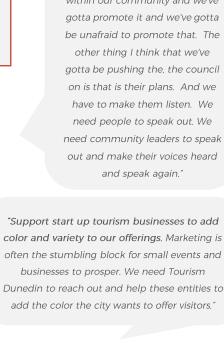
Being more supportive of arts, music, culture and events and celebrating a

Improved employment / career opportunities and choices for youth

"We've gotta invest in leadership within our community and we've gotta promote it and we've gotta be unafraid to promote that. The other thing I think that we've gotta be pushing the the council.

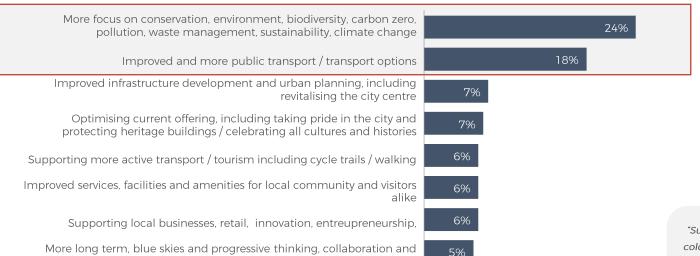
"Be more inclusive, respect

tangata whenua and grow,



"Underpin all tourism business plans/strategies with a response to climate change. Help tourism businesses move to a more circular economic model of sustainable growth. Help tourism business develop year-round markets Start thinking of Dunedin as being a global

leader..."



3%

Other

collaboration and less working in silos

more vibrant, culturally rich city

More community focus and consultation

Encouraging slow tourism; linger / stay longer





### **APPENDIX**

# **SURVEY DATA WEIGHTING**

	Pre-Weighting	Post-Weighting
Ōtepoti Dunedin sub-regions:		
Ōtepoti Dunedin City and inner suburbs	66%	82%
Mosgiel / North Taieri + Strath Taieri	12%	12%
Otago Peninsula	11%	2%
Waikouaiti Coast	5%	1%
West Harbour	5%	2%
Other (Please specify)	1%	1%
Age:	%	%
15 - 29 years	13%	32%
30 - 39 years	18%	13%
40 - 49 years	21%	14%
50 - 59 years	22%	15%
60 - 69 years	17%	12%
70+ years	8%	13%
Prefer not to answer	1%	1%
Gender:		
Female	59%	51%
Male	38%	46%
Prefer not to answer	3%	3%
Base: Total Sample	n=	478



### **APPENDIX**

# **SAMPLE PROFILE (UNWEIGHTED)**

Grew up in Ōtepoti Dunedin	
Yes - I grew up in Ōtepoti Dunedin	38%
No-I didn't grow up in Ōtepoti Dunedin	62%
Base: Total Sample	n=478

Multigeneration	
Yes - My parents grew up in Ōtepoti Dunedin	69%
No - My parents didn't grow up in Ōtepoti Dunedin	31%
Base: Grew up in Ōtepoti Dunedin	n=183

Arrival in Ōtepoti Dunedin	
Prior to 1980	8%
1980 - 1989	12%
1990 - 1999	10%
2000 - 2009	25%
2010 - 2019	28%
2020 or later	17%
Base: Did not grow up in Ōtepoti Dunedin	n=295

Household Composition	
My husband, wife or partner	69%
My mother and/or father	1%
My children aged under 5	12%
My children aged 5 to 17	25%
My children aged 18 or older	7%
Other family/whānau	5%
Other person(s)	10%
None of the above - I live alone	13%
Prefer not to answer	4%
Base: Total Sample	n=478

Ethnicity	
New Zealand European	79%
Māori	5%
Samoan	1%
Chinese	1%
Indian	1%
Other	16%
Prefer not to answer	6%
Base: Total Sample	n=478



### **APPENDIX**

# **SAMPLE PROFILE (UNWEIGHTED)**

Occupation	
Employed full-time in paid work	49%
Self-employed	17%
Employed part-time in paid work	16%
Unpaid/volunteer work	7%
Studying	9%
Looking after family and/or home	5%
Retired	13%
Looking for work or unemployed	1%
Beneficiary	1%
Prefer not to answer	1%
Base: Total Sample	n=478

Industry	
Administrative and Support Services	5%
Agriculture, Forestry and Fishing	2%
Arts and Recreation Services	5%
Construction	3%
Education and Training	14%
Electricity, Gas, Water and Waste Services	2%
Financial and Insurance Services	3%
Health Care and Social Assistance	12%
Information Media and Telecommunications	3%
Manufacturing	3%
Mining	1%
Other Services	3%
Professional, Scientific and Technical Services	9%
Public Administration and Safety	4%
Rental, Hiring & Real Estate Services	1%
Retail Trade	5%
Tourism / Accommodation and Food Services	12%
Transport, Postal and Warehousing	2%
Wholesale Trade	1%
Other	10%
Base: Employed / Self-employed	n=373



