From: Jenny Lapham

To: <u>"andrew.marshall@odt.co.nz"</u>

Subject: Local Government Official Information and Meetings Act 1987 Request

Date:Thursday, 24 June 2021 11:16:00 a.m.Attachments:Dunedin Views on Tourism Report.pdf

Good morning Andrew

I refer to you request for a copy of the Tourism Survey mentioned in the Strategic Tourism Assets Protection Programme June 2021 Update considered at the Economic Development Committee meeting on Monday 21 June 2021.

Please find attached a copy of the survey as requested.

Regards

Jennifer Lapham

Governance Support Officer Civic

P 03 4774000 | E Jenny.Lapham@dcc.govt.nz Dunedin City Council, 50 The Octagon, Dunedin PO Box 5045, Dunedin 9054 New Zealand www.dunedin.govt.nz VIEWS ON TOURISM PROGRAMME

VIEWS ON TOURISM: DUNEDIN

AUGUST 2020 - JANUARY 2021



RESEARCH APPROACH

Following are findings from questions included in Dunedin's Views on Tourism research¹ conducted during August 2020 - January 2021. The questions are designed to measure resident opinion on the value of international and domestic tourism and the extent to which tourism might be having adverse impacts. The research considers Dunedin residents' views on tourism and its impacts on the city, and contrasts this with sentiment expressed by New Zealand residents about New Zealand.

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

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



KEY INSIGHTS



Dunedin residents' sentiment towards international and domestic tourism is slightly more positive than the sentiment of New Zealand residents generally. The international TAR score sits at 30 and the domestic TAR score sits at 64.

84 percent of Dunedin residents have personally benefitted from tourism activity in their local area. Almost one in two of this group believe that tourism activity means more local businesses are opening or able to stay open, and two in five believe tourism activity provides opportunities for employment/income. These two benefits are also the most widely felt benefits of tourism amongst New Zealanders as a whole.

63 percent of Dunedin residents have been negatively impacted by tourism activity in their local area. One in two of this group have found that tourism activity leads to more litter and waste being generated, more than one third have faced greater difficulty finding a car park, and more than one third have observed damage to the natural environment occurring. Asked whether enough action is being taken to address the negative impacts of tourism, an average 72 percent of the Dunedin residents that have experienced negative impacts agree that there is. Key actions that residents believe will help mitigate negative impacts of tourism include greater investment in infrastructure (especially car parking), reducing the cost of housing, and improving international visitors' driving.

Looking to the future, Dunedin residents would like the local tourism industry to most focus on creating employment for people in the community, improving community infrastructure, and attracting more domestic visitors. A number of comments regarding the recovery of tourism post-COVID-19 suggest that the industry's focus should be on increasing the value for money of tourism offerings and services in Dunedin. Several acknowledged the importance of balancing tourism's recovery with the risk of COVID-19 transmission.

Asked about the benefits of cruise ships and their passengers visiting Dunedin, residents acknowledged the increased visitor spend, greater opportunities for local merchants and the creation of jobs for local residents. Conversely, residents cited impacts of cruise ship passengers visiting the city, including increased traffic, congestion and crowding, a lack of parking and the impact of the natural environment.

Residents most commonly agree that heritage and nature and beaches are key pillars for tourism in Dunedin. Agreement that wildlife, arts and culture and food and beverage are key pillars is lower.

Views on Tourism: Dunedin Residents - Snapshot

TOURISM APPROVAL RATING (TAR)

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



KEY PILLARS FOR TOURISM IN DUNEDIN % of Dunedin residents who agree [X] is a key strength for tourism in Dunedin 91% 89% 83% 81% 72% Heritage Nature and beaches Wildlife Arts and culture Food and beverage

FOCUS FOR LOCAL TOURISM INDUSTRY IN FUTURE



Creating employment for people in community



Improving community



Attracting more domestic visitors

BENEFITS OF TOURISM - TOP 5

84% of Dunedinites have benefitted from tourism activity in their area



More local businesses opening, or being able to stay open



Opportunities for employment & income



Greater
appreciation
of historic
buildings and
sites



Greater appreciation of the natural environment



Inspired me/us to travel domestically

ADVERSE IMPACTS OF TOURISM - TOP 5

63% of Dunedinites have experienced adverse impacts from tourism activity in their area



More litter and waste generation



Greater difficulty finding a car park



Damage to the natural environment



Too much pressure on community infrastructure



h Takes longer
on to get to
ty places due
ure to traffic &
congestion



72% of Dunedin residents, on average, agree that enough action is being taken to address the negative impacts of tourism activity in their local area

INTERNATIONAL TOURISM

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

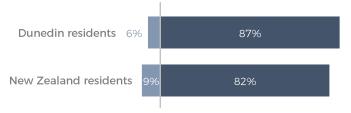
Although the benefits of international tourism are widely acknowledged by Dunedinites, 54 percent believe that international visitors put too much pressure on New Zealand, and 44 percent believe that international visitors put too much pressure on their region – both higher proportions than those recorded for the New Zealand population as a whole.

The international TAR score, which considers the positive and negative impacts of international tourism shows a level of 'limited acceptance' for both Dunedinites and New Zealanders overall. Dunedin's TAR score of 30 is slightly higher than New Zealand's TAR score of 27, and double the Otago region's international TAR score of 15.

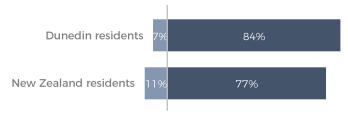
By age group, Dunedin residents aged 45-59 years appear to be less likely to support international tourism, compared to other age groups. This is also reflected amongst all New Zealand residents, although those aged 18-29 years also share the lower level of support.



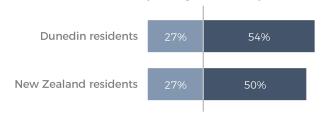
International tourism is good for New Zealand



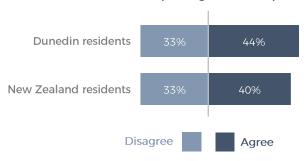
International tourism is good for my region



International visitors are putting too much pressure on New Zealand



International visitors are putting too much pressure on my region





DOMESTIC TOURISM

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

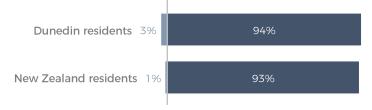
Amongst Dunedin residents, 20 percent believe that domestic visitors put too much pressure on New Zealand, and 21 percent believe that domestic visitors put too much pressure on their region - both similar proportions to those recorded for the New Zealand population as a whole.

Dunedin's domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, is more favourable than its international TAR score. Dunedin has a domestic TAR score of 64 (for New Zealand it is 62). The Otago region's domestic TAR score is six points lower than Dunedin's, at 58.

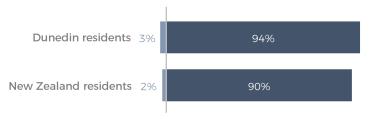
Findings also suggest that support for international tourism has a correlation with age (older residents are more likely to be supportive). However, this does not appear to the case with Dunedin residents.







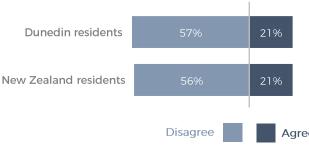
Domestic tourism is good for my region

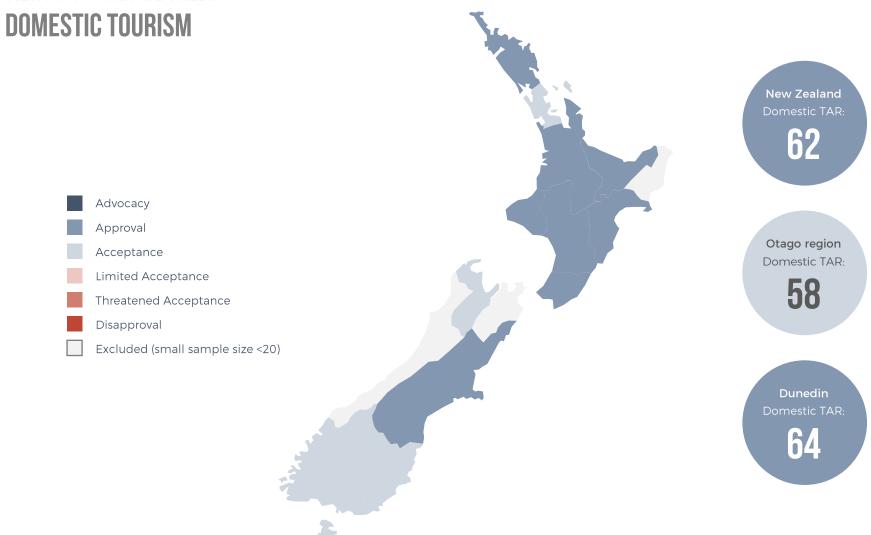


Domestic visitors are putting too much pressure on New Zealand



Domestic visitors are putting too much pressure on my region

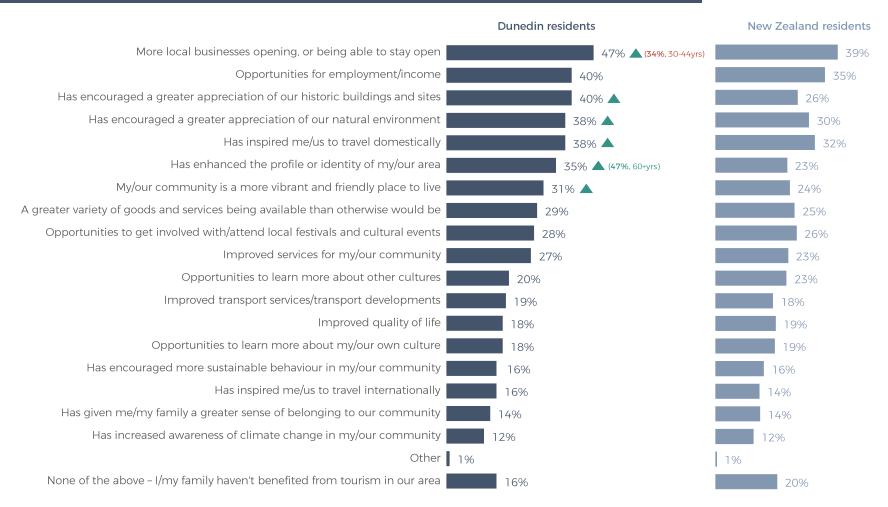






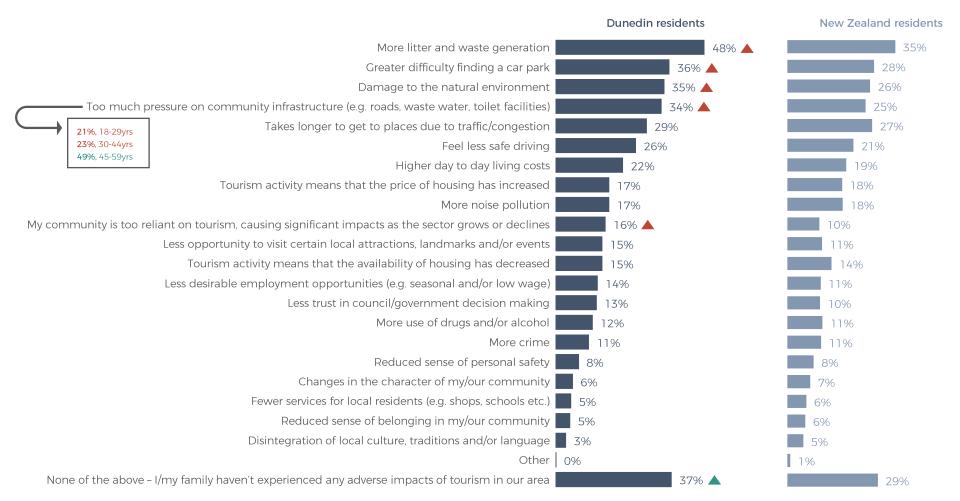
BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

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



NEGATIVE IMPACTS FROM TOURISM ACTIVITY IN LOCAL AREA

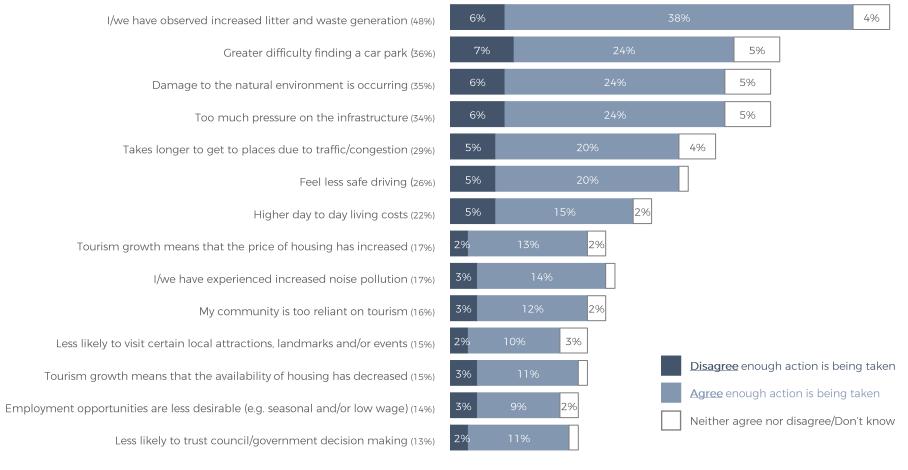
In which of the following ways, if any, would you say you/your family are negatively impacted by tourism in your local area?



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

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

Negative impact (ranked by prevalence)



IDEAS FOR BETTER ADDRESSING TOURISM NEGATIVE IMPACTS

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

CAR PARKING

"Cycle lanes could be cut out and parking on the streets could be added as they used to be. Parking buildings should be part of the new hospital build, but there is no provision for that in the current plans."

"Need more carparks instead of taking them away with bike lanes etc"

"The Dunedin City Council could stop actively reducing the number of parking spots around the city centre"

INFRASTRUCTURE (GENERALLY)

"Quality of roads strongly needs improvement, more frequent buses on weekends"

"Spend more money on infrastructure at council and government level"

"Sustainable transport options, bike and e-scooter lanes"

"The Council and government need to dramatically improve roads and the availability of services like public toilets in towns and rest areas on highways"

"Get traffic signals to be synchronised to keep traffic moving... ease up on the car being an enemy"

HOUSING

"Houses should be selling for their worth relative to the economic situation. It has spiralled up where now we are just competing with wealthy foreigners for property in our own country."

"I'm not sure how to fix it BUT the housing prices and shortage in Dunedin is crazy and I worry for my family if my rental ever goes up for sale and we have to try find somewhere else to live!"

"Only allow NZ citizens to buy houses and land in NZ"

"When there is a housing shortage and local families are living in hotels, why are people allowed to buy and convert houses in to AirBnB's? Short term rentals really aren't helping the matter and if people can't find a place to rent, how exactly are they going to even think about buying."

INTERNATIONAL VISITORS & DRIVING

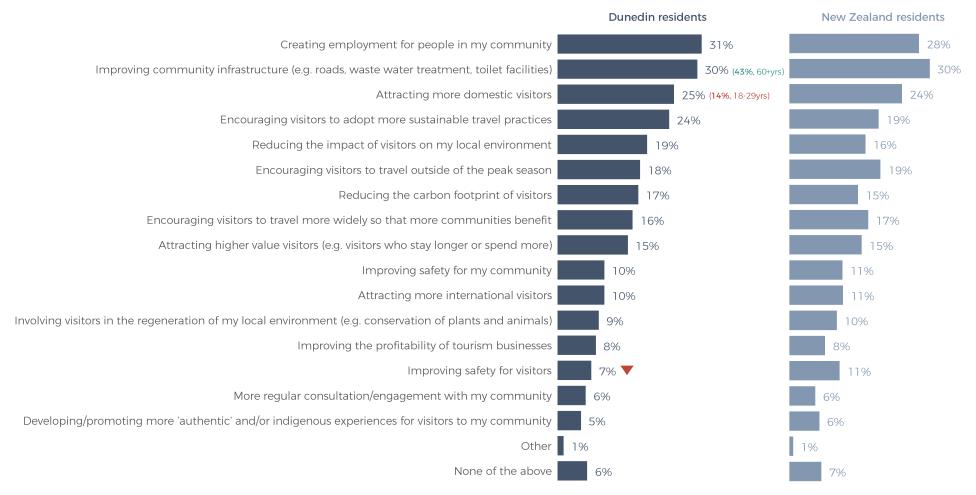
"Perhaps a short written driving test for international visitors who are renting vehicles to drive on NZ roads; covering basic common sense scenarios and NZ-specific safety issues like driving in wet or windy conditions, right of way at intersections, driving on hills, MAXIMUM speeds on any roads, and the potential harm or fatalities that could result from disregarding any of these rules. Perhaps include a map highlighting main roads that are one-way in major NZ cities in vehicle rental information packets."

"The international visitors are either not truly qualified drivers or do not have driving experience on NZ roads. They should not be allowed to freedom drive on NZ roads unless they can prove competency."

"They need to test overseas licence holders before they are allowed to drive in NZ"

FUTURE FOCUS FOR TOURISM INDUSTRY

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



RECOVERY OF TOURISM

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

Most comments from Dunedin residents relate to the need to stay cautious regarding the ongoing COVID-19 pandemic, and to tourism operators offering incentives or increasing value for money for domestic travellers. The tourism industry's challenging road to recovery and an increase of domestic visitors in the local area were also noted.

"Tourism prices, meaning locals cannot afford to venture in their own backyard"

"I know that Dunedin will feel the pinch this summer with no tourist ship cruises so it is important that Council/tourism industry target more New Zealanders to check out their back yard with Dunners at the top of awesome destinations to visit"

"The absence of tourists has certainly had a negative effect on the local community. However, like many industries, the profits are privatised, and the costs socialised. The tourism industry has to meet a greater share of the cost of tourism in terms of its negative effects on the environment and quality of life of NZ residents. Inevitably, I believe this means fewer tourists, stricter requirements on so-called 'freedom camping', and a change in the mentality that NZ's beauty and relaxed lifestyle is something that can be commercially exploited with no regard to the social costs."

"Central Otago is generally a hotspot for international tourists, which has seen a huge decrease because of Covid. However, I think there has been an increase in domestic tourism, which is great to see. Yet, most NZers (especially Aucklanders) seem to flock to Queenstown and Wanaka, and I would love to see a push for NZers to see a wider range of places within Otago, and NZ in general. This would help smaller communities and local businesses recover better, rather than just pushing money into a couple of bigger towns/cities."

"Our border needs to be closed until the roll out of the Covid-19 vaccination"

"Tourist operators need to have discount for locals"

"Need to attract higher value international travellers - discourage freedom camping. If they want to come to NZ then pay the price." "I think tourism is finding it very difficult without international travellers, even with increased domestic tourism"

"We need quality not quantity. Less numbers but staying longer and thus spending more. Less emphasis on cruise ships. They spend very narrowly and very locally compared to bus tours or FIT's."

"Ensuring there is public transport connecting every town, and shuttles to tourist sites as not everyone has a car or is a confident driver. It's much easier for people without cars to travel to tourist sites in other countries than it is in NZ."

"Discourage the low value freedom campers who do not value the environment and spread their human waste around the peninsula. They are disgusting and don't add much value outside of renting a van."



CRUISE SHIP VISITS - BENEFITS

In what ways, if any, would you say you/your family have benefitted from cruise ships and their passengers visiting Dunedin?

The economic benefits of cruise ships berthing in Dunedin are widely acknowledged, including bringing in more money for the region and providing greater opportunities for local businesses. Provision of more employment opportunities for locals and increasing the vibrancy of Dunedin are other noted benefits.

"Just seeing the large ships come in with visitors browsing and looking around this area gives me a positive feeling about living here"

"They bring in money and we are proud in our region to show them our benefits and history"

"More vibrancy. Greater feeling of being part of a wider community. Personal interactions with tourists."

"They visit local shops and spend their money.
Encourages local artists and craftsman at the
local marketplace set up in the Octagon when
cruise ships come into town."

"More money spent and more jobs"

"Cruise ships have injected a lot of money into the city by their visits which is good for everyone in Dunedin"

"They are able to provide employment for local vendors through the selling of local produce/product"

"Increased awareness of the city as a destination"

"More foot traffic and help local business"

"It has meant that some of our favourite attractions - train trips, nature trips etc have been able to prosper and that the local community can enjoy them"

"When there were cruise ships the city was a much brighter and vibrant place, and there were greater opportunities for new businesses to grow and thrive"

"Opened up tourism opportunities eg Albatross colony"

"I used to have a shop in the Octagon and the cruise ships provided us with the majority of our income"

CRUISE SHIP VISITS — NEGATIVE IMPACTS

And, in what ways, if any, would you say <u>you/your family</u> have been negatively impacted from cruise ships and their passengers visiting Dunedin?

Traffic and congestion caused by cruise passengers visiting Dunedin were top of mind for most respondents, with several actively avoiding the city when a cruise ship is in town. Other negative impacts experienced include overcrowding in the city, a lack of parking because of cruise ship buses and the general impact on the environment.

"High priced admission to local attractions"

"Increased visitor numbers put a strain upon local amenities"

"Covid-19 was bought here and risked my family's lives"

"Makes town super busy, I tend to avoid the mall and Octagon on cruise ship days"

"There is a manageable amount of extra traffic, but some very poor infrastructure choices have been made regarding traffic flow between Port Chalmers and the Octagon. The Octagon gets clogged with cruise buses, the new bus hub has been put in a very strange and unhelpful location, and it's always inconvenient to find routes around both the university and stadium."

"I believe prices were hiked up to take the tourist dollars which meant Dunedinites have also had to pay more"

"Octagon closed too much with traffic diverted. Drop tourists off elsewhere. We are the ratepayers and are getting treated like second class citizens."

"Can't always get to the attractions I want to due to overcrowding"

"More people and traffic and less care for the environment often displayed by those who come off the ships"

"I feel they're not good for the environment, harbour has had to be dredged to accommodate the ships which negatively affects biodiversity" "More rubbish lying around"

"Transport / parking allocated for tourists and taken from locals"

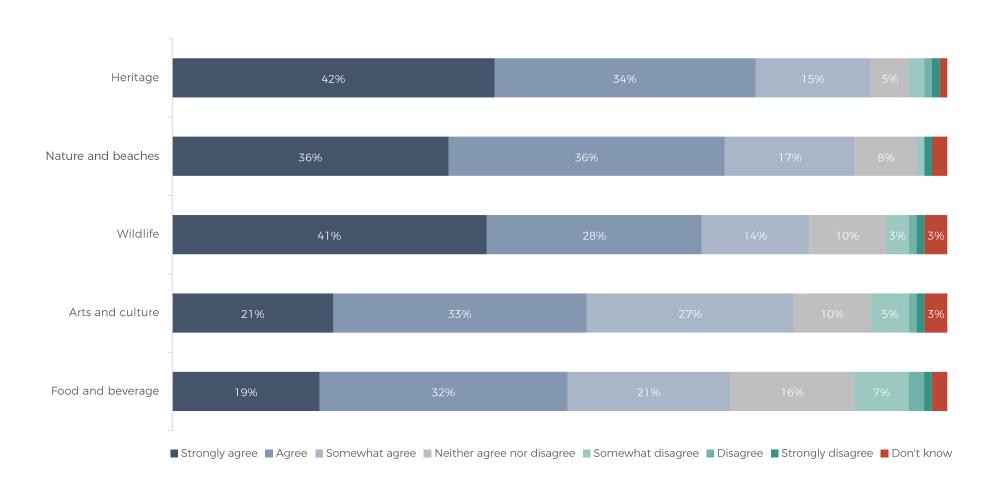
"Availability of parking in the CBD"

"The centre of the city can be very busy on cruise ship days, so takes longer to get around the city"

"When cruise ships are in the whole city is impacted in small ways. Usually by everything (roads, venues, stores) getting massively congested. You have to plan your driving route around knowing if a ship is in or not, because if one is in the main road through town is closed off, leading to more traffic on other routes, leading to traffic jams. If there is more than one in at a time? Better off to just stay home that day, cause you won't be able to get anything done."

DUNEDIN'S KEY STRENGTHS

To what extent do you agree or disagree with each of the following... [X] is a key strength for tourism in Dunedin





DEMOGRAPHICS — DUNEDIN RESIDENTS

Total	Samp	le
TOtal	Jailib	

Gender	
Male	51%
Female	49%
Age	
18 - 19 years	2%
20 - 24 years	9%
25 - 29 years	10%
30 - 34 years	8%
35 - 39 years	10%
40- 44 years	7%
45 - 49 years	7%
50 - 54 years	6%
55 - 59 years	10%
60 - 64 years	7%
65 - 69 years	10%
70 - 74 years	8%
75+ years	6%
Base: Total Sample	n=319

Total Sample

Travel in Past 12 Months			
Travelled in New Zealand	81%		
Travelled outside New Zealand	15%		
Have not travelled	16%		
Household Composition			
My husband, wife or partner	57%		
My mother and/or father	4%		
My child/children aged under 5	9%		
My child/children aged 5 - 14	15%		
My child/children aged 15+	8%		
Other family/relatives	6%		
Other person(s)	9%		
None of the above - I live alone	18%		
Prefer not to say	3%		
Base: Total Sample	n=319		

Total Sample

Ethnicity	
New Zealand European	81%
Other European	6%
New Zealand Maori	8%
Cook Island Maori	1%
Pacific Islander	2%
Chinese	3%
Indian	1%
African	0%
North American	1%
Latin American	0%
South American	1%
Middle Eastern	1%
Other	3%
Prefer not to say	3%
Base: Total Sample	n=319

