



UNLOCKING THE FUTURE OF TOURISM

Views of New Zealanders

Qualitative Research conducted by Tourism New Zealand

Queenstown

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Date: 27th January 2021



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NEW ZEALAND**

What did we set out to understand?

- 1 How have the values of New Zealanders altered since COVID-19?
- 2 New Zealanders perception of the impact of tourism and how has this changed since COVID-19.
- 3 Current and future expectations of tourism amongst New Zealanders (domestic and international).
- 4 What does success look like for the country on the whole, and at a regional level?
- 5 Fundamentally what does a long-term view need to take into consideration?

How did we go about it?



Nine focus groups were conducted up and down the country with New Zealanders.



Twenty-six in-depth interviews (IDI's) were undertaken with tourism operators to gain a specific industry view.



Focus groups and interviews incorporated the following regions to capture Metro gateways, Transitional, Seasonal and Tourism-heavy destinations.



FINDINGS



Kea Point, Aoraki Mount Cook



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Exploring remains part of the nature of New Zealanders and the inability to explore overseas has made Kiwis look more closely at their own backyard



THE NEED TO EXPLORE REMAINS

Learning and exploring has been intrinsic to travel for New Zealand, and while the international travel mindset changed, their need to explore has not altered.



LOOKING FOR ALTERNATIVES

New Zealanders have been forced to look for domestic alternatives, which by their own admittance they have taken for granted and overlooked in the past.



RECONNECTING WITH THE FAMILIAR

Nostalgia and revisiting 'old gems' in a new phase of life was the trigger many needed to plan and book their last holiday, and dream about their next.



DISCOVERING NEW AND HIDDEN

The more relaxed pace of their journeys enabled some to find unknown spots and hidden gems along the way. And when this happens it strengthens their desire to continue to explore.



ALL HAS SERVED TO RENEW NEW ZEALANDERS APPRECIATION OF PLACE AND PEOPLE

New Zealanders already know what makes their country special – they're seeking what makes it **unique**

THE DOMESTIC QUEST

What was enough for
an international visitor



Beautiful



Diverse



Friendly



Accessible



Safe

...are givens for a domestic
audience who also seek...



History



Culture



Hidden Gems



Community



Personal

THE JOB TO BE DONE: We need to deepen and enrich the experiences on offer to appeal to New Zealanders.

As always, there are barriers to overcome. Here's what we heard from New Zealanders



OPPORTUNITY

Through deepening audience understanding and meeting the needs of the domestic leisure holiday visitor through creating unique experiences - we can build a solid foundation in readiness for returning international visitors.

Source: One Picture October 2020 'Unlocking Future Tourism' Qualitative Research – conducted by Tourism New Zealand



"For them it would just be £50, for us it's \$100. And when you start thinking of a family of four doing the activity, that just becomes out of reach."

Kuaotunu, Coromandel



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New Zealanders recognise that the tourism industry needs their support

- The domestic audience know and accept that there's a shortfall and the tourism industry needs support.
- Looking ahead, there is a desire amongst New Zealanders to attract a specific type of international visitor, but to do so it's important that the infrastructure exists to meet their expectations.
- There's a view/recognition that the industry won't be set up for this without the support of New Zealanders in the meantime.

As such, New Zealanders are open and receptive to being asked to help keep the industry going, BUT it needs to align with their needs from a leisure holiday

Source: One Picture October 2020 'Unlocking Future Tourism'
Qualitative Research – conducted by Tourism New Zealand



Cathedral Cove, Coromandel



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So, what are the key opportunities we uncovered to meet the needs of the domestic leisure holiday audience?

1. Tell stories that are built around the **UNIQUE** qualities that exist within the area / region to overcome perceived over-familiarity that we know exists, i.e. Encourage a reappraisal .
2. Greater alignment between regions has the potential to support transitioning from lower-value day-trips to higher-value journeys.
3. Subsequently, enabling a shift from tourism businesses operating in isolation to a broader regional positioning ladder up into a national view of a domestic tourism offering.

Source: One Picture October 2020 'Unlocking Future Tourism'
Qualitative Research – conducted by Tourism New Zealand



Lake Pukaki, Mackenzie



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When we probed New Zealanders on what would encourage them to see and experience the regions, some activities came up consistently

	 Cycling	 Walking	 Food & Beverage	 Events
REFRESH	Best Family Rides	Best short walk	Wine Capital	Ballet
THRILL	Great Rides	Best Great walks	Wild Food	Sport
PLAY	Winery hopping	Best bar crawls	Pie Capital	Lantern Festival
KNOWLEDGE	Rail trail	Best City History Tours	Foraging tours	WOW

OPPORTUNITY

- There’s an opportunity to help domestic visitors link what they want to do with how they wish to feel when they’re doing it, i.e. refreshed, thrilled, fun/playful or knowledge-seeking.
- The opportunity also exists to turn regional assets into curated itineraries that appeal to the needs of the domestic visitor.

SO: There is a job to be done to find and champion the unique and interesting ‘reasons why’ for each destination so New Zealanders can feel confident that we can deliver an experience they are looking for.



Dart River, Glenorchy



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Views of Tourism in COVID times. New Zealanders still recognise the positive impacts tourism has and the importance of welcoming visitors back again



DEVELOPMENT

Tourism dollars as well as the increasing numbers have contributed towards creating better roads, infrastructure and services, which also benefits the locals.

“The development has been massive. 10 years ago, Hokitika did not have what it does now”



OPPORTUNITIES

Locals are aware of and appreciate the jobs that have been created in the experience, adventure and hospitality sector as a direct result of the growth in tourism.

“It’s definitely benefited the locals by creating more jobs, especially in hospitality”



REPUTATION

We have gone from being a small country at the corner of the world to a clean and green aspirational destination that the world has taken notice of.

“I think the biggest benefit has been making New Zealand famous. Everyone knows us now”



VIBRANT TOWNS

Many regions have gone from quiet and dull to becoming cultural hubs with a vibrant food scene, flourishing arts and crafts centres.

“I remember when everything in the town used to close by the evening. Tourism has added colour and spice to it”



CULTURE GROWTH

Tourism has enabled our more isolated regions to broaden their cultural horizons by interacting with international visitors, and allowed New Zealand to share its culture with the world.

“We are pretty isolated here in Invercargill, so it’s a great way for us to experience different cultures”

Impact of COVID

No noticeable difference in how locals think about it

Greater awareness as the sector suffers

Opportunity to boost due to our ‘almost’ COVID-free status

A noticeable slowdown across regions

Seen as important but secondary to continued personal safety

However, not without concern... New Zealanders are prepared to reconcile some of these concerns however, it's more challenging than before in light of COVID



**GROWING SENSE
OF PROTECTIONISM**



**DIFFERENTIATION
BETWEEN VISITORS**



**'US' vs 'THEM'
ATTITUDE**

“Tourism was at a tipping point before COVID. There were regions that were struggling with the increasing numbers and relatively limited infrastructure to manage their impact, especially on the environment”

SO: COVID-19 has been a reconsideration about what balance looks like for New Zealanders, forcing us to think about what balance looks like for our tourism industry, our country, and ourselves when borders reopen.



What did we hear from tourism operators?

UNCERTAINTY AND OPPORTUNITY

- **An appreciation for the support from New Zealanders**
We heard more good stories than bad, and there was acknowledgment and a sense of appreciation for how New Zealanders have supported businesses and operators.
- **A realisation that domestic tourism has untapped potential**
Especially those with a domestic and smaller group focus are now feeling vindicated by their approach, and there is a general realisation that domestic tourism is more resilient than many gave it credit for.
- **Getting by for now, but questioning what's coming**
That there are few who got through without losing any staff, and as wage subsidies are coming to an end, they are starting to think about what's next. A concern that at best they might 'just get by'.

CONCERNS

- **Their ability to sustain until international tourism is back**
They are questioning how long domestic tourism can help them sustain the dip in business, and whether they will be able to pull through by the time borders open for international visitors. Some are even starting to consider alternative means of livelihood.
- **Big and mass will eat the small and boutique**
Concerns that the government will channel their money towards those who are biggest and loudest and that smaller and more local operators will not benefit as much from the support.
- **Domestic traveller will take a back seat once the Aussie bubble opens**
That the Trans Tasman bubble will open and that our gaze will turn offshore again and inbound international travel may keep domestic visitors away if not managed correctly.

The opportunity to tell a unique New Zealand story was articulated by operators as follows, aligning to what we heard from the domestic audience



WE'VE CREATED AN INDUSTRY THAT IS FOCUSED ON THE DOLLAR

There was a boom that made for easy money, where many were not thinking deeply about the quality of the experience or their impact, but were focused more on maximising their profits.

SO: These are the parts of a pre-COVID-19 industry that many would rather see left behind.



MĀORI CULTURE HAS BEEN UNDER VALUED AND UNDERSOLD

For visitors it's often the most compelling part of their trip. The higher level of intrigue and respect international visitors have for Māori culture points to the need of reconnecting to it ourselves.

SO: Deepening our connection with Māori culture can add value to our tourism story. But needs to be done properly.



THERE IS A NEED TO FOCUS MORE ON OUR CONSERVATION STORY

'Conservation' is a higher value story than 'natural beauty' as it is one based in care and how we look after our place, rather than just what we have - and we need to start talking more about it.

SO: Our place is well positioned - adding in a layer of how we look after it can help protect and promote it better.



AND THE OPPORTUNITY TO SCALE UP AUTHENTICITY

Taking the boutique 'experience' focused approach and adopting it to mainstream activities is a way that we can start to build authenticity into every area of the visitor journey. A shift away from 'bums on seats'.

SO: It doesn't have to be one or the other - we can build in the unique New Zealand way into every experience.

REGIONS

Omarama, Waitaki



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Plan for the future: Metro Gateways Auckland, Christchurch and Wellington

What’s happening today?

Each of the towns we spoke with were looking to mean more than just a ‘gateway’ for visitors. A view that we haven’t made the most of what our city spaces have to offer or differentiated them in the mind of visitors.

Their unique challenges

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Viewed as transition places
Being more than a stopover to the next nice view.
- 

Nothing to stand out
Little focus on parts of the city experience that can’t be had anywhere else.
- 

Moderate town vibrance
Need to dial up the buzz in the air, especially in CBD zones across all metros.
- 

Weather-dependent activities
A sense that the best of our cities is explored by bike or on foot, discouraged by any poor weather.

Key

 Working well  Working OK  Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>The scenery is too similar for those looking to escape</p> <p>A lot to see and do as a group, but too much hustle and bustle to create the introspective moments some are looking for. Also family friendly activities are far and few between, particularly in Wellington.</p>	<p>A perception that cities have more to offer</p> <p>Wellington in particular has a lot to offer to the younger mindset through it’s vibrant café culture and nightlife, but noted missing out on concerts. There is more we can do for Auckland, and Christchurch to attract more than just a transitioning visitor.</p>	<p>Not the first choice</p> <p>Cities have not been traditionally seen as par with other regions as places for sports or adventure activities. What can we offer within each city that does compete with what the region has to offer?</p>	<p>Opportunity to find a unique story for each city</p> <p>Wellington - A story that heroes the unique Wellington culture. Auckland - A story that talks to the incredible beaches and nature walks. Christchurch - A story of the rebuild of a modern city on strong traditional foundations.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #2: Change the narrative</p> <p>Demonstrate how we are more than just a stop-over for regional visits</p> <p>Promote unique experiences and share stories that demonstrate what makes each city unique vs. other global cities .</p>	<p>Rule #3: Show them our ways</p> <p>Demonstrate that cities and culture can go hand in hand</p> <p>Showcase the culture born from the unique history in each city, and create authentic experiences for visitors to see it firsthand.</p>	<p>Rule #1: Quality, not quantity</p> <p>Build to maximise the value for visitors</p> <p>Opportunity exists to leverage the unique quality of experiences being offered to engage visitors through the value of experience.</p>	<p>Rule #4: Walk the talk</p> <p>Take a lead on sustainable tourism</p> <p>Start planning for the future - think infrastructure for electric cars, a renewed focus on environmentally friendly tours etc.</p>
<p>SO: Our main metros suffer from the perception of ‘same old’ - what they need is their own unique story (and supporting infrastructure) to be able to stand out from each other, and other cities around the world.</p>			

Plan for the future: Central Otago/Queenstown

What’s happening today?

The sense amongst New Zealanders was of a regional story that’s on track, however, a tourism model that’s too focused on the dollar with the opportunity to adapt to positively impact from a social, cultural and environmental perspective.

Operators and locals alike agreed that tourism in Queenstown, as it was, wasn’t sustainable.

Their unique challenges



Environmental impact

A growing sense of frustration towards visitors from observing a lack of respect towards the land.



Rising cost of living

A large number employed in the low-wage industry are unable to maintain a good standard of living.



Overcrowding and driving

Congestion in peak seasons and dangerous driving from those visitors not used to the roads.

Key

Working well Working OK Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>Currently associated with play and thrill</p> <p>The perception that Queenstown is an expensive holiday can be countered to an extent by promoting family/group things to do or places to visit that are less commercial or expensive.</p>	<p>The go-to place for New Zealanders</p> <p>The vibrancy and breadth of activities have made this region a popular destination among younger groups. This works well for the most part, but locals are keen on ensuring that any subsequent unruly behaviour is kept in check.</p>	<p>Their pride and pain</p> <p>The landscape and tourism story have together made this region a globally sought after destination. Locals told us they feel priced out of activities in their place with a belief that pricing has been structured for international visitors.</p>	<p>Cultural sharing and learning have taken a backseat</p> <p>New Zealanders feel there is an opportunity to increasingly incorporate cultural learning or history to deepen the experience.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #4: Walk the talk</p> <p>Stricter policing</p> <p>Seeing rules being enforced more proactively and any wrong-doing incurring the appropriate fines - for instance ensuring freedom campers parked in unauthorised spaces are fined.</p>	<p>Rule #1: Quality, not quantity</p> <p>Discouraging ‘free’ holiday makers</p> <p>Driving home the fact that renting campervans does not warrant a free holiday in other areas, and building the necessary infrastructure to support caring for people and place.</p>	<p>Rule #3: Show them our ways</p> <p>Education on our care for the land</p> <p>Showing visitors the right way of caring for the land - for instance telling them of our connection to our rivers to demonstrate why washing their clothes in it is unacceptable.</p>	<p>Rule #2: Change the narrative</p> <p>A story that goes beyond adventure</p> <p>Dialing up the focus on local delights and stories to showcase the unique and personal experience in addition to adventure.</p>
<p>SO: Locals and operators overwhelmingly agreed on the need to focus on our social and economic development as much as the economic gains from tourism while also incorporating elements of our culture in our narrative</p>			

Plan for the future: Nelson

What’s happening today?

There was a strong sense of optimism around domestic tourism, i.e., A sense that Nelson has been put on the map amongst New Zealanders. Those we heard from in Nelson are keen that this status been maintained.

Their unique challenges



Lost Vibrancy

A noticeable downturn in restaurant/ hospitality activity.



Freedom Campers

That they came with poor driving, crowding and litter. Their absence is also providing space they appreciate.



Needing a Plan

Region would benefit from an improved unified promotional approach.



Not high value ready

A feeling that there is limited accommodation options to meet the needs of a higher-value visitor.

Key

■ Working well ■ Working OK ■ Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>An escape into nature</p> <p>The combination of accessibility to nature and climate can make Nelson a place to indulge and relax. A desire to see eco packages. Battery powered bikes and accessible walks.</p>	<p>World leading Food & Beverage potential</p> <p>A feeling that it’s been up to individual operators to tell their story with a desire for a bigger national story around South Island beer, food and wine. We also heard desire for Nelson to become a conference destination, although noting that currently they’re lacking in good infrastructure.</p>	<p>Mountain biking mecca</p> <p>We heard from those in Nelson that they believe they have all the ingredients to be a world-class mountain biking destination. Strong appetite for a focus on biking.</p>	<p>Untold stories</p> <p>Definitely of Māori culture but also of colonial history that sits on the door step of Nelson — think The Copper Mine, and the settling of the Treaty with Nelson tribes.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #1: Quality, not quantity</p> <p>A tighter, more united approach</p> <p>There are opportunities to put Nelson on the map, from hosting the Red Bull Enduro Series to being a desirable conference destination — but it requires investment and resource to elevate it.</p>	<p>Rule #3: Show them our ways</p> <p>Guide and manage where people go and stay</p> <p>A feeling that visitors need to be encouraged to invest in staying in campsites vs. car-parks with clear education around taking their waste with them.</p>	<p>Rule #4: Walk the talk</p> <p>A grassroots conservation story</p> <p>Tell the story of volunteers that have built the trails and infrastructure that as visitors they now have the opportunity to walk / ride.</p>	<p>Rule #2: Change the narrative</p> <p>That Nelson can be a destination rather than an arrival point</p> <p>A desire to re-write the story that if you don’t want to go tramping, there is nothing to do there.</p>
<p>So: There is a theme of untapped opportunity for Nelson with a desire to elevate what it can offer to the domestic market, and in turn be more than just a gateway to the great walks</p>			

Source: One Picture October 2020 ‘Unlocking Future Tourism’ Qualitative Research – conducted by Tourism New Zealand



Plan for the future: Rotorua

What’s happening today?

We heard that locals feel a void in the absence of international visitors, missing the vibrancy that tourism brings to their town. However, in recent years they have observed more ‘package’ visitors which subsequently has reduced the interaction they have enjoyed with visitors in the past.

Their unique challenges



Town vibrance

There is potential to improve vibrancy in the town.



Bus operators

One of the bigger ‘bus destinations’ in New Zealand, but increasingly the buses only stop in a few places and that’s it.



Transport & infrastructure

Having a car is critical to the visitor experience and there is little in the way of public transport available.



Commercial

A view that the city is more international than local operators. Economic gains that tourism brings doesn’t always stay in Rotorua.

Key

Working well Working OK Needs work


MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>More for the parents than the family</p> <p>Spa and thermal activity do help tell a story here, but the ‘rest/relaxation/pamper experience only comes to life through a few operators.</p>	<p>Pay to play</p> <p>A number of the experiences and activities are linked more to thrill than fun. Few ‘non-commercial’ options for those wanting to explore and meet others. Desire and appetite for more focus around biking.</p>	<p>Historically focused on thrill</p> <p>Luging, white water rafting, mountain biking... Rotorua has traditionally lived off adventure tourism positioning. A wide variety of options and operators.</p>	<p>Currently more commercial than authentic</p> <p>It is felt that too little to taught about some of the history of Rotorua, why it was chosen as the hub for Māori culture and the myths surrounding the thermal activity. For being such a cultural hub there is a big missed opportunity here.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #4: Walk the talk</p> <p>Opportunity to build common connection</p> <p>Between visitors and locals. Allowing visitors to experience the town on their own terms... getting them off the bus and into explore the town.</p>	<p>Rule #1: Quality, not quantity</p> <p>Looking for those visitors who do come in and stay an extra night</p> <p>Excitement took precedence when visitors had only a short stay, but a future focus to make these stops more than just the luge and Hell’s Gate.</p>	<p>Rule #2: Change the narrative</p> <p>There’s more to Rotorua than the activities</p> <p>Showcase the slower (less expensive!) parts of a Rotorua stay that are impactful..., walks around the blue lake, the story of the buried village.</p>	<p>Rule #3: Show them our ways</p> <p>The Māori story with more than just performance</p> <p>Experiencing real Māori custom in a way that enriches and educates all visitors, rather than purely entertains.</p>
<p>SO: There needs to be a balance moving forward between enhancing the activities Rotorua has built up, as well as the untapped potential of its rich Māori history and story</p>			


Plan for the future: Tauranga


What’s happening today?


Concern expressed that tourism growth opportunities haven’t been maximised in the past and a sense that their region is vulnerable to the pressure that peak season brings without the benefits of more well-rounded gains.

Their unique challenges

- 

A feeling of unique identity
Desire to create appeal for transitioning and / or cruise visitors.
- 

Economic benefit
With a high proportion of cruise visitors - a sense that economic gains are going to international operators.
- 

Concentrated crowds:
Congestion during summer, especially at Mount Maunganui, followed by dry periods/regions.
- 

Accommodation shortages
Limited hotels, resulting in high number of Airbnb’s and rising rental costs.

Key

 Working well  Working OK  Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>Leveraging the art and cultural talent of the region</p> <p>Locals are proud of their art scene and see the potential for promoting it more actively through art fairs, workshops and exhibitions.</p>	<p>A call to host more events to boost the town culture</p> <p>Keeping shops, restaurants and pubs open for longer. Hosting live events, especially to boost shoulder season tourism. Hosting big occasion events, such as NYE, Christmas.</p>	<p>Potential to go beyond surfing to become a Water Sports Hub</p> <p>Has a variety of water sports, but current focus is on promoting surfing. There is opportunity to talk about glow worm kayaking, nature cruises and other sport activities.</p>	<p>Little interest and awareness about Tauranga’s history</p> <p>A sense that Tauranga has never shared what’s unique to it. There is opportunity to boost local pride and domestic experiences by incorporating the town’s history into experiences.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #2: Change the narrative</p> <p>Showing the best of what’s on offer</p> <p>Moving away from the perception of a transition destination through sharing the Tauranga arts and culture story and promoting water activities.</p>	<p>Rule #1: Quality, not quantity</p> <p>Going beyond cruise tourism</p> <p>Shifting the focus towards independent travellers over group tours, especially cruise visitors, to maximise economic gains for the region, and creating more accommodation options.</p>	<p>Rule #3: Show them our ways</p> <p>Sharing our respect for the ocean</p> <p>Group and cruise tours limit local interaction and opportunities to share culture. Consider ways of sharing our locals connection with the ocean through experiences.</p>	<p>Rule #3: Walk the talk</p> <p>Prepping for peak season needs</p> <p>Keen to ensure the right infrastructure facilities are in place such as toilets and bins to cater for peak season especially and lead by example.</p>
<p>SO: More than anything, there is a need to step out of the shadows of Neighbouring regions by creating a unique identity for Tauranga that’s built on the culture and activities that the region has to offer</p>			

Plan for the future: Taupō and Ruapehu

What’s happening today?

An appreciation of what tourism has given, and a growing appreciation of Aucklanders and how much they bring to their area, which was noticed in the second lockdown especially.

Their unique challenges



Short Stays

Visitors just popping in for an evening after the Tongariro crossing or just using Taupō for a base to ski from.



Seasonality

Desire to strengthen proposition outside of ski season, building a story around staying by the lake for summer with a variety of activities.



Reasons to stay in town

A story defined by the natural spaces and places around them leaves the city with less opportunity to be dynamic.

Key

Working well Working OK Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>A focus on ‘after ski’, not a weeks break</p> <p>Strong in a ‘post ski’/ post thrill wind down, with the likes of Wairakei and DeBretts. Lakeside camping and family fun focused areas add to this in some ways.</p>	<p>More individual than social</p> <p>It’s easier to plan small and individual itineraries than stag dos or family getaways. There is a lack of a central ‘why’, like wineries on Waiheke or breweries in Manawatu.</p>	<p>Skiing, boating, skydiving... a good mix of thrill</p> <p>Catering well to the thrill crowd, especially the Mountain. Little improvement is needed.</p>	<p>Opportunity to focus on history through story telling</p> <p>Similar to Rotorua, a number of rich stories can be told about the area, without focus.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #1: Quality, not quantity</p> <p>Easing congestion for locals</p> <p>While appreciative of the visitors, the ease of getting around town has made many locals realise what they were giving up day to day.</p>	<p>Rule #2: Change the narrative</p> <p>Building connections between visitors and hosts</p> <p>Encouraging time spent in the main centre to cross paths with more than the typical spots. Keeping the town vibrant for everyone.</p>	<p>Rule #3: Show them our ways</p> <p>Less focus on bums on seats</p> <p>For the likes of boat tours to the carvings, a sense that there was a missed opportunity in talking about more of the story behind them, the importance of the lake and what it means.</p>	<p>Rule #4: Walk the talk</p> <p>Continued focus on hiking etiquette and safe driving</p> <p>Reducing visible impacts on the likes of the Tongariro crossing and on the Desert Road.</p>
SO: A town that has thrived on Thrill, but needs to dial up fun for the entire family to extend trips past a weekend			

Plan for the future: Invercargill and Hokitika

What’s happening today?

There was a sense that these regions haven’t experienced some of the challenges as they relate to high visitor numbers. There’s an appetite to grow tourism, while being mindful of not repeating the mistakes of other regions in doing so.

Their unique challenges



Dangerous driving

Trickier roads are cause for concern with visitors that are not familiar to them.



Limited local interaction

A large percentage of campervans and group tours restricts local interaction and investment.



Freedom camping

Although lower in tourist numbers, these regions are seeing issues like littering and toileting grow.



Not as well known as other destinations

Desire to be seen as destinations in their own right.

Key

■ Working well ■ Working OK ■ Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>Pride in the offering, but desire more promotion</p> <p>Extensive cycleways, birdlife and conservation, and a food culture they are proud of! But also a sense that there is more that can be done to make New Zealanders aware of what’s on offer.</p>	<p>Not closely aligned to this pillar</p> <p>Locals feel the greater opportunity is telling the story that’s rooted in their history, place and people. There was a desire to avoid being perceived as a ‘party place’.</p>	<p>Potential to dial up the less conventional thrill offerings</p> <p>Not traditionally promoted as ‘thrill destinations’ but activities like treetop walks, mountain biking, fishing trips and horse riding is available to visitors.</p>	<p>Surface level understanding among New Zealanders</p> <p>They have a rich Māori heritage, an interesting gold mining history and some fantastic museums- everything New Zealanders know exists, but have limited knowledge of - and there is opportunity to dial it up.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #1: Quality, not quantity</p> <p>Encourage spending locally</p> <p>Build the number and quality of the activities we have to offer to encourage visitors (particularly independent travellers) to stay longer and spend more.</p>	<p>Rule #4: Walk the talk</p> <p>Preparing for growing numbers</p> <p>Ensuring the right rules and infrastructure are in place to manage growing numbers, along with rules and regulations from the onset.</p>	<p>Rule #3: Show them our ways</p> <p>Showcase our culture through our care for the place</p> <p>Connection and responsibility towards the land is an intrinsic part of the culture of these regions and there is an eagerness to share this with the world.</p>	<p>Rule #2: Change the narrative</p> <p>Communicate in the voice of locals</p> <p>Families who have been involved with the evolution of these regions for generations can add a unique and personal touch to visitor experiences- opportunity to involve them in storytelling.</p>
<p>SO: There is appetite for tourism growth in these regions, but with a cautious mindset. Tackling challenges early and systematically while investing in tourism infrastructure is how many defined the way towards success</p>			

Plan for the future: Whangarei and New Plymouth

What’s happening today?

Both naturally gifted areas of New Zealand that also boast of a rich history and culture (including greater Māori presence), but with locals who feel like they’d been forgotten by the international visitor.

Their unique challenges



Maintaining balance

Locals appreciate their relative distance from tourism, but are conflicted by desire for economic development.



Keeping locals engaged

A resistance to freedom campers came through strongly.



Investment

Desire for funding to get a number of big ideas for tourism development underway.

Key

Working well Working OK Needs work

MEETING THE DOMESTIC NEEDS			
REFRESH	PLAY	THRILL	KNOWLEDGE
<p>Sand, surf and sun</p> <p>Both are blessed with some of the best beaches in New Zealand, but this is seasonal, and weather dependent. There is a desire to see family friendly indoor activities as well.</p>	<p>Boost live events, with emphasis on Māori music</p> <p>There is opportunity to host more live events, with a particular focus on Māori music, starting with promoting the artists and their music on radio.</p>	<p>Introducing more festivals</p> <p>Encouraging more festivals that fuel the economy as well as a level of excitement for locals and domestic travellers a like. A successful example of this is Americana for New Plymouth.</p>	<p>Opportunity to bring the unique rich and raw history to life</p> <p>For Taranaki especially around Parihaka and the land wars. A compelling topic, but still fresh for many... it being their grandparents who were directly affected by it.</p>
RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE			
<p>Rule #3: Show them our ways</p> <p>Hero-ing the Māori Culture</p> <p>An awareness that Māori culture is highly intriguing to international visitors and can help their experience stand apart from other countries - Think Ta moko, Māori music, cultural tours etc.</p>	<p>Rule #2: Change the narrative</p> <p>Authentic Story-telling</p> <p>Effectively telling the true story of the regions that will enable visitors to experience authenticity and feel a connection to us and our land – THINK Invasion of Parihaka for Taranaki.</p>	<p>Rule #1: Quality, not quantity</p> <p>Encouraging visitors to go beyond the free experiences</p> <p>Use free experiences like Māori Rock Carvings and the walks to create value, but actively focus on targeting smaller numbers and higher spend by creating luxury experiences.</p>	<p>Rule #4: Walk the talk</p> <p>Protecting the land</p> <p>Ensuring that we do not chop down or impact our forests for building infrastructure when tourism picks up. Also educating others to respect our land by leading with example.</p>
<p>SO: Being away from the tourism limelight has resulted in many stories left untold and places remaining untouched in both these regions, so there is immense potential to deliver authentic and unique experiences</p>			

Where to from here?

- This research demonstrates that New Zealanders will have different expectations of the tourism industry when borders reopen. It will take a nation-wide and industry-wide collaborative approach to deliver on this. We have the opportunity to build more value into domestic tourism, ensuring New Zealanders feel just as satisfied with a domestic holiday as they would and international leisure holiday
- This research was conducted by One Picture on behalf of Tourism New Zealand. This qualitative research was undertaken to determine and understand New Zealanders' perceptions of tourism before and during COVID-19, as well as what they'd like future tourism within New Zealand to take into consideration.



Hooker Valley Track, Aoraki Mount Cook



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QUESTIONS?

Get in touch! Email: comms@tnz.govt.nz

**THANK YOU
NGĀ MIHI**

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