

COMMUNITY SENTIMENT

SURVEY INSIGHTS // 2022

CEDA

CENTRAL ECONOMIC
DEVELOPMENT AGENCY

TE MAURI O
MANAWATŪ
—◇♥≡^—

LOCALS' THOUGHTS ON THE VISITOR INDUSTRY

For the second year in a row, CEDA distributed a community sentiment survey to help us better understand local perceptions on the value of the visitor industry in our region, and how we can work together to sustainably grow visitor activity and value for the benefit of our community.

In the year to March 2022, the Manawātū visitor economy was worth over \$300 million to the city and region, up from \$276 million in 2021. With the closure of international borders due to COVID-19, visitors to our region have been predominantly domestic right up until the first half 2022.

Being more than two years into a pandemic that has systematically changed our tourism ecosystem, impacted businesses, highlighted talent shortages, and generally changed our way of life, we needed to better understand the community sentiment of our visitor industry. Hearing the voice of residents helps CEDA to gain a better understanding of how we can align our marketing and business support strategies and bring even more economic activity to the region, and helps measure the ongoing impact of the Manawātū Destination Management Plan.

Here's what our community had to say.

WHERE PARTICIPANTS RESIDE



62%

Palmerston North

▼ Decrease compared with 76% in 2021



11%

Feilding

▲ Increase compared with 7% in 2021



16%

Manawātū

▼ Decrease compared with 22% in 2021



11%

Other

▲ Increase compared with 8% in 2021

AGE RANGE OF PARTICIPANTS

18-24 // 3%

Consistent with 3% in 2021

25-34 // 14%

▲ Increase compared with 13% in 2021

35-44 // 19%

▲ Increase compared with 17% in 2021



65+ // 20%

▲ Increase compared with 19% in 2021

55-64 // 22%

▼ Decrease compared with 25% in 2021

45-54 // 21%

▼ Decrease compared with 23% in 2021



81%

of people believe the visitor sector is an important industry in Manawātū

▼ Decrease compared with 89% in 2021



86%

agree that the visitor industry has a positive impact on Manawātū.

▼ Decrease compared with 90% in 2021



48%

know about the [ManawatuNZ.co.nz](https://www.ManawatuNZ.co.nz) regional website

▼ Decrease compared with 56% in 2021



65%

believe the visitor sector provides good employment opportunities in Manawātū.

▼ Decrease compared with 74% in 2021



70%

support local tourism businesses in the short to medium term.

▼ Decrease compared with 75% in 2021



71%

would actively encourage friends and family to come visit.

(New question asked in 2022 survey)

WHO DID WE SURVEY?

Distributed via boosted Facebook promotions and by way of CEDA's extensive electronic direct mail databases over a period of several weeks, we heard the voices of 338 locals (a 50% increase on 2021 respondents).

OUR COMMUNITY VALUES // THE VISITOR INDUSTRY

CEDA's community sentiment survey was distributed between July and August of 2022, following the peak of Omicron and over a time when international borders fully opened. While support of the visitor industry has dropped slightly in comparison to 2021, perhaps due to the advent of Omicron and resulting uncertainty, it is still overwhelmingly positive.

TOURISM INITIATIVES

WHEN ASKED IF THEY HAD HEARD OF ANY TOURISM INITIATIVES IN MANAWATŪ, THE MAJORITY (57%) OF RESPONDENTS SAID NO.

Those who had, mentioned sports events and motorsport, along with experiences such as He Ara Kotahi and cycle trails.

Promotional initiatives which stood out were Facebook advertising promotions, the Palmy (not boring) campaign and Shop Local.

When asked why they think people visit Manawatū, locals were given a range of options.

TAKING THE GOOD WITH THE BAD

This year we added a new question to the survey, asking locals why they think people choose not to visit Manawatū. When considering community sentiment, it is important to hear the good along with the bad.

The most common theme which came through is a perception that Manawatū is boring (44%) with no major attractions or drawcards. Some locals stated weather (11%) was an issue, while others blamed location (17%) as Manawatū is off State Highway 1, or incorrectly perceived not to have a beach. Some also felt a lack of promotion (9%) was to blame.

TOP FIVE REASONS PEOPLE VISIT MANAWATŪ // ACCORDING TO LOCALS



75%

VISITING FAMILY & FRIENDS

▲ INCREASE COMPARED WITH 73% IN 2021.



63%

CONFERENCES AND BUSINESS

▼ DECREASE COMPARED WITH 66% IN 2021.



52%

EDUCATION

▼ DECREASE COMPARED WITH 54% IN 2021.



51%

SPORTING EVENTS

▼ DECREASE COMPARED WITH 54% IN 2021.



38%

FESTIVALS OR EVENTS

▼ DECREASE COMPARED WITH 41% IN 2021.

MUST DOS // FOR VISITORS

OUR OWN COMMUNITY ARE OUR GREATEST ADVOCATES FOR OUR REGION.

We asked respondents to share with us their top three 'must do' activities for visitors. While a range of responses covering the great outdoors, through to events, motor racing and places of interest were put forward, we seem to be very keen on the 2021 favourites, with no real change in trends.

Walking or cycling along the Manawatū River and visiting He Ara Kotahi is still the most popular must-do recommended by locals. Victoria Esplanade continues to be a favourite for families.

Our hospitality sector continues to receive a big shout out, with recommendations for bars, restaurants and cafes coming in strongly.

As a community, we are also proud of our local countryside, with must dos including hiking and bush walking, mountain biking, driving country roads and visiting our beaches. Te Āpiti – Manawatū Gorge is the preferred location for such activities.

"The Gorge walk is a must, all our amazing shops and the beautiful restaurants."

"Glow worms caves. Totara forest at night. Take the Sledge track to the platinum mines"

"Manawatū river walking, cycling trails. Ashhurst murals at the domain and drive up to Pohangina Totara Reserve. Saddle Road to the wind farm."

"Walk along our Awa and feed the eels. Food! So many great places! Enjoy a show, so many options with Act 3, The Globe etc."

MOST POPULAR MANAWATŪ MUST DOS // AS RECOMMENDED BY LOCALS.

37% **WALKING/CYCLING
ALONG THE
MANAWATŪ RIVER**
▼ DECREASE COMPARED WITH 42% IN 2021

20% **VISITING THE
ESPLANADE**
▼ DECREASE COMPARED WITH 30% IN 2021

26% **EATING/DRINKING
OUT**
▼ DECREASE COMPARED WITH 30% IN 2021

19% **TE ĀPITI - THE
MANAWATŪ GORGE**
▼ DECREASE COMPARED WITH 25% IN 2021

HOLIDAYS AND THE IMPACT OF COVID-19



LOCALS VIEW ON VISITORS TO OUR REGION



54%

of locals are comfortable with domestic visitors

▼ DECREASE COMPARED WITH 94% IN 2021

52%

of locals are comfortable with international visitors once borders open

▼ DECREASE COMPARED WITH 58% IN 2021

WE ASKED A SERIES OF QUESTIONS AROUND HOW LIKELY LOCALS WERE TO TAKE HOLIDAYS DOMESTICALLY OR INTERNATIONALLY, ALONG WITH THEIR THOUGHTS ON VISITORS HOLIDAYING IN OUR REGION.

The majority of respondents (78%) were likely to take a holiday in New Zealand within the next 12 months, with 41% having already planned their getaways. The most popular types of holidays planned were visiting family and friends, along with action and adventure.

Interestingly, we are not so welcoming of visitors to our region in comparison to 2021. This may be because the survey was undertaken just following the peak of Omicron and as international borders opened. In 2022, 54% of locals were comfortable with domestic visitors, compared with 94% in 2021. When it comes to international visitors, the numbers are more similar, with 52% of locals comfortable with them visiting, compared with 58% in 2021.

When asked whether COVID-19 had changed their views on the visitor sector, 26% said yes, with 11% revealing their views had changed positively, while 15% of local views had changed negatively. A change in views came about primarily from concerns around spreading the virus locally.

GROWTH OF OUR VISITOR INDUSTRY



Locally, there was some concern (23% have concern, 38% unsure) for the growth of our visitor industry, particularly in relation to the provision of unique attractions and activities, along with the public perception of Palmerston North as a visitor destination.

“There isn’t enough accommodation and quality hospitality options in the region. Hospitality in Palmerston North needs to be closer together.”

“Once again it comes down to not enough activities or venues to inspire tourists.”

“We need out of region money. We need word of mouth experiences to sell Manawatū. Everyone on the same page selling the same experience and forcing them to return”

“Not enough hotel beds, or nice enough hotels.”

When asked what would make Manawatū an even better visitor destination, repeated themes came across. Some were similar to 2021 such as hosting major events and festivals, while others were new. There is a strong push from locals for greater publicity and promotion of Manawatū as a destination, along with a cleanup of rundown buildings in the central CBD. Locals also want to see a more thriving nightlife, greater use of the river and easier public transport access to tourist activities.

“Make more use of the river with boating, canoeing and other water activities”

“To have some one-of-a-kind attraction to lure tourists and then they can explore all the hidden gems. Things like splash planet, use things like the military and air force connection we have here to develop a one-of-a-kind attraction, that’s nowhere [else] in NZ. Go big or go home.”

“Shut off Broadway and make it [for] bars and restaurants.. Make the river a hot spot in summer with pop up bars and restaurants... like Europe does.. eg Geneva”

**“More boutique shops open to 4pm
Roads safer to cycle eg cycle to Ashhurst
More entertainment in bars”**



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