

VIEWS ON TOURISM[©] PROGRAMME

VIEWS ON TOURISM: NEW ZEALAND

YEAR ENDING MARCH 2024

INTRODUCTION

This report captures findings from questions included in Views on Tourism® research conducted from **April 2023 to March 2024**¹. Tourism New Zealand is Angus & Associates' country-level partner for the research programme in New Zealand.

The Views on Tourism questions are designed to measure resident opinion on the value of international and domestic tourism and the extent to which tourism is having both positive and adverse impacts. The research considers New Zealand residents' views on tourism and its impacts on their region, and contrasts this with the sentiment expressed by residents of other destinations (currently Australia and Ireland) for context.

From 1 October 2023, the research has been expanded to measure sentiment towards tourism activity **overall** (as well as retaining the separate international and domestic tourism sentiment measures), and residents' views on the extent of positive and negative impacts of tourism based on the four capitals (New Zealand's economy, environment, society, and culture). **Initial information from the expanded survey is available in this report on the pages clearly noted as 'Oct 23 – Mar 24' and visually distinguished by the use of an orange colour palette.**



METHODOLOGY

The research is undertaken with a representative (by age, gender and region) sample of at least n=250 New Zealand residents each month. The sample is collected continuously through the year and accumulates to at least n=3,000 on an annual basis.

The sample is drawn from a leading online research panel and all respondents are aged 18 years or more.

For key measures, results for Australia and Ireland are included in the report to provide more context for the New Zealand results and to serve as points of comparison. The same Views on Tourism® core question set, and similar methodologies are used in those destinations.

Tourism Approval Rating (TAR)

- Each TAR is an index 'score' calculated from responses to a set of statements about the benefits of tourism activity and its impacts.
- The calculation gives equal weight to responses in relation to each statement.
- Separate TAR scores are calculated for international and domestic tourism (i.e. there are two scores – one for inbound tourism, and one for domestic tourism).
- International and domestic TAR scores are calculated using the same methodology (i.e. they are comparable in this sense).
- The TAR is plotted on a six-section scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' overall perceptions of domestic and international tourism for a destination on an ongoing basis.



KEY INSIGHTS



The percentage of New Zealanders who agree that international tourism is good for New Zealand has increased since the last quarterly report and at 93% is 3 percentage points higher than it was a year ago.

93% of New Zealand residents also agree that domestic tourism is good for New Zealand. New Zealand's domestic Tourism Approval Rating (TAR score) of 61 is 11 points higher than its international TAR score of 50. However, the international TAR score has improved over the past two years.

80% of New Zealand residents personally benefited from tourism activity in their local area in the year ending March 2024. More than one third (37%) see that tourism activity means more local businesses are open or able to stay open, and a similar proportion (37%) benefit from tourism activity providing opportunities for employment/income (for them or their family).

In the past year, 68% of New Zealand residents have been negatively impacted by tourism activity in their local area in some way. 29% have experienced more litter and waste generation and 23% experience greater difficulty finding a car park or believe that it takes longer to get to places due to traffic/congestion caused by local tourism activity (22%). These have been the top three concerns since YE Mar 2020.

Asked whether enough action is being taken to address the negative impacts of tourism, 71% agree that there is (the same result as the previous year). Key actions that New Zealand residents believe will help mitigate the negative impacts of tourism include greater improvement of community infrastructure, managing/lowering living costs, improving safety, and taking better care of the environment.

KEY INSIGHTS (CONT.)



Looking to the future, 28% of New Zealand residents would like the local tourism industry to focus most on improving community infrastructure. Others commonly believe key areas of focus should be creating employment for people in the community, attracting more of both international and domestic visitors, and encouraging visitors to travel outside of the peak season.

Two thirds of New Zealand residents (68%) have engaged with tourism/visitors in some way during the past two years. Three in ten have hosted visitors in their home. Other common activities included recommending a local or domestic tourism activity or attraction to someone they know, and interacting with someone they don't know who was visiting their region.

Based on data for the period of Oct 23 - Mar 24, the TAR score for tourism overall - which considers the positive and negative impacts of tourism - is at the level of 'acceptance' for New Zealand residents (at 51). In terms of the impacts of tourism based on the four capitals (society, culture, economy and nature), New Zealand residents think that tourism has the most positive impact on the economy while the most negative impact on the natural environment.

Two thirds of New Zealand residents are concerned about the impact that tourism could have on the natural environment. Half would like to see more effort to educate visitors and locals on why they need to protect and preserve New Zealand, in order to mitigate environmental impacts of tourism.

Views on Tourism Snapshot: New Zealand Residents

Research was conducted between April 2023 and March 2024 using Angus & Associates' [Views on Tourism](#)© programme. The sample includes n=3,113 New Zealand residents aged 18+ years.

TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism






International TAR:








Domestic TAR:








80% of New Zealand residents have experienced benefits from tourism activity in their area, and the top 5 are...


-  More local businesses opening, or being able to stay open
-  Opportunities for employment & income
-  Inspired them to travel domestically
-  Opportunities to learn more about other cultures
-  Greater appreciation of the natural environment

68% of New Zealand residents have experienced adverse impacts from tourism activity in their area, and the top 5 are...

-  More litter and waste generation
-  Greater difficulty finding a car park
-  Takes longer to get to places due to traffic and congestion
-  Damage to the natural environment
-  Higher day to day living costs

Residents most commonly want their local tourism industry to focus in the future on...

-  Improving community infrastructure
-  Creating employment for people in the community
-  Attracting more international visitors
-  Encouraging visitors to travel outside the peak season
-  Attracting more domestic visitors

The background of the slide is a photograph of a lush green forest, featuring tall trees and a dense canopy of leaves. A large, white, semi-transparent circle is positioned on the left side of the image, containing the text.

OVERALL SENTIMENT
TOWARDS TOURISM
ACTIVITY

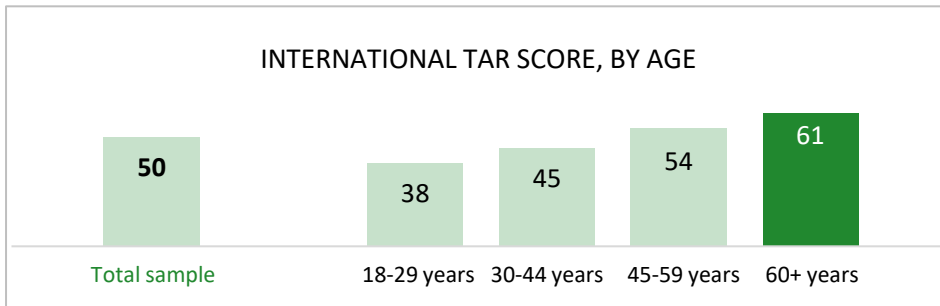
INTERNATIONAL TOURISM

The vast majority of New Zealand residents (93%) agree that international tourism is good for New Zealand and a slightly smaller proportion (87%) agree that international tourism is good for their region. These proportions are higher than they were in the previous year.

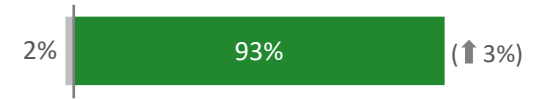
Despite the benefits of international tourism being widely acknowledged by New Zealand residents, one third (34%) believe that international visitors put too much pressure on New Zealand and more than a quarter (28%) believe that international visitors put too much pressure on their region.

The international TAR score, which considers the positive and negative impacts of international tourism, is at the level of 'acceptance' for New Zealand residents (at a TAR score of 50).

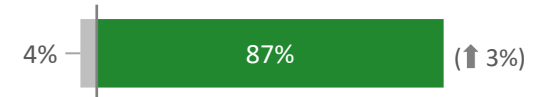
By age, younger New Zealand residents view international tourism less favourably than older age groups. The international TAR score is also lower than it is for the total sample amongst Chinese New Zealanders (at 36), NZ Māori (at 40) and Indian New Zealanders (at 45), and those who have not travelled domestically or internationally in the past 12 months (at 45).



International tourism is good for New Zealand



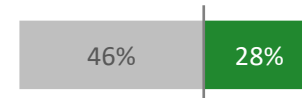
International tourism is good for my region



International visitors put too much pressure on New Zealand



International visitors put too much pressure on my region



Disagree* Agree*

Base: Total sample - New Zealand residents n=3,113

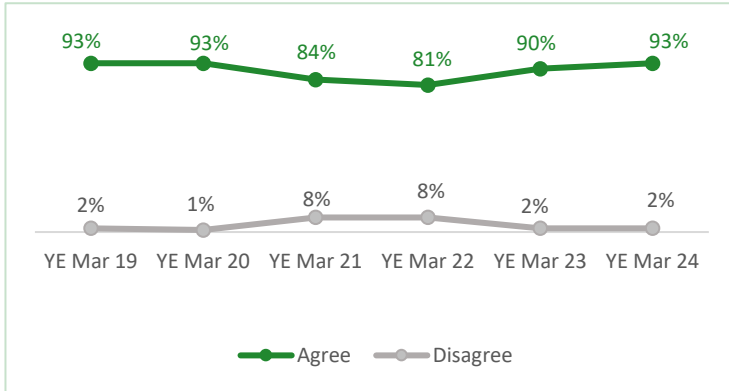
Arrows (↑/↓) indicate statistically significant differences vs YE Mar 2023 at 95% confidence level

*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree;

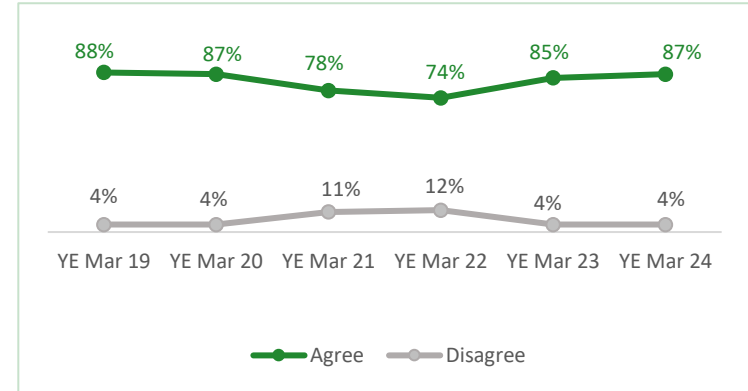
'Neither agree nor disagree' and 'Don't know' responses excluded

INTERNATIONAL TOURISM

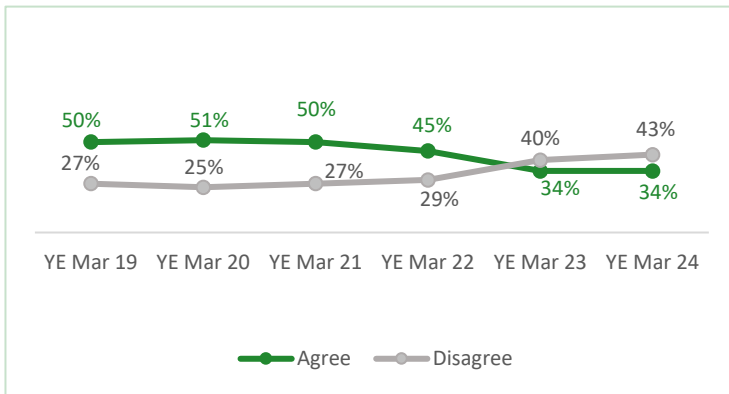
International tourism is good for New Zealand



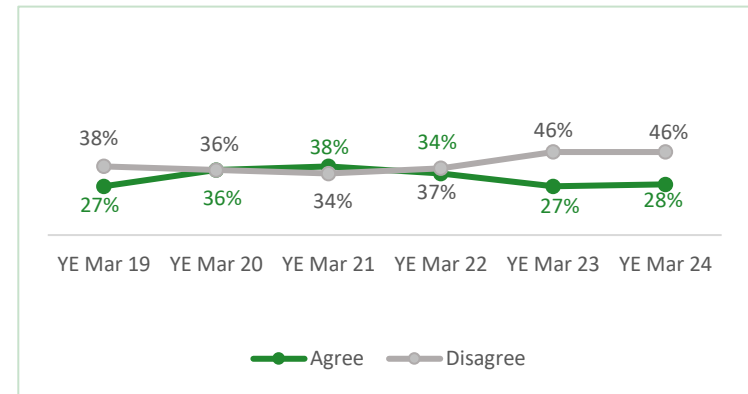
International tourism is good for my region



International visitors put too much pressure on New Zealand



International visitors put too much pressure on my region



Base: Total sample - New Zealand residents: YE Mar 19 (n=2,478); YE Mar 20 (n=2,749); YE Mar 21 (n=3,041); YE Mar 22 (n=3,097); YE Mar 23 (n=3,220); YE Mar 24 (n=3,113)

*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree;

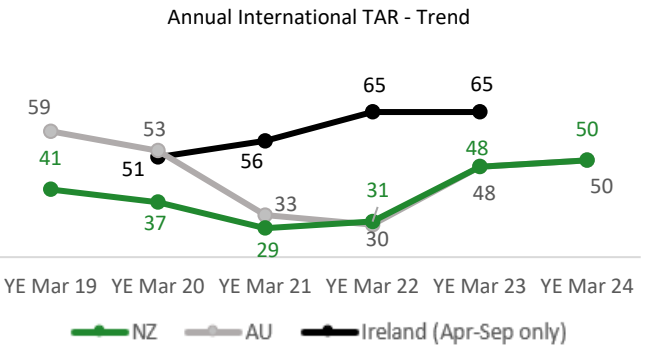
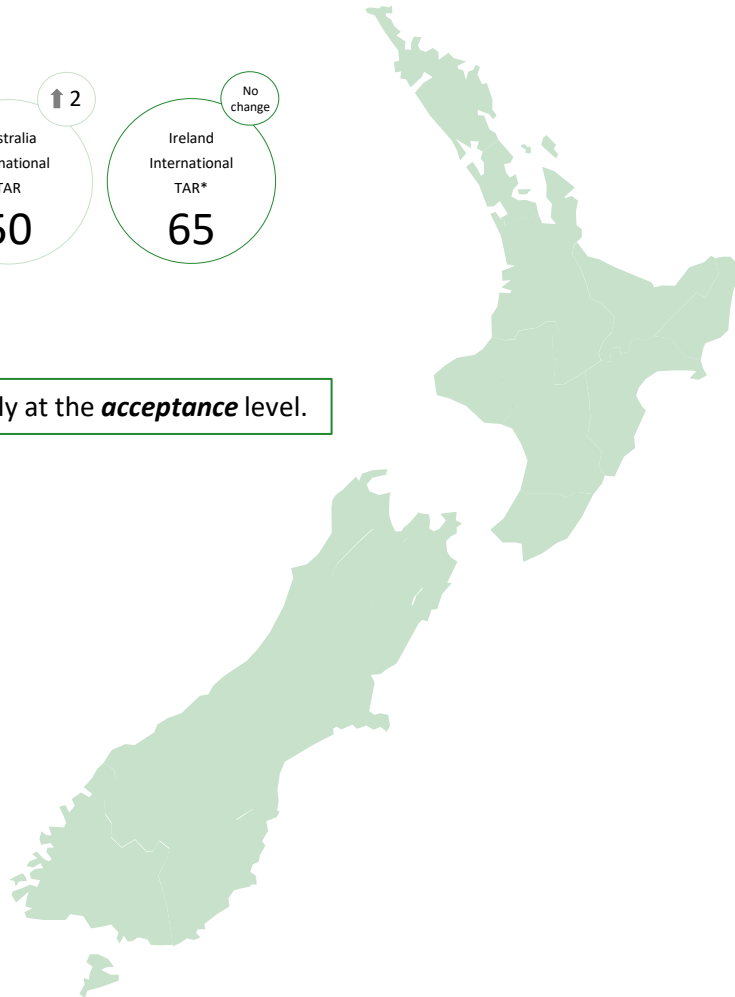
'Neither agree nor disagree' and 'Don't know' responses excluded

INTERNATIONAL TOURISM (CONT.)



Every NZ region is currently at the **acceptance** level.

- █ Advocacy
- █ Approval
- █ Acceptance
- █ Limited Acceptance
- █ Threatened Acceptance
- █ Disapproval



Region	International TAR	N=
Northland	55	119
Auckland	50	1,003
Waikato	51	298
Bay of Plenty/Gisborne/Hawke's Bay	51	349
Taranaki/Manawatū-Wanganui	51	243
Wellington	53	349
Tasman/Nelson/Marlborough/West Coast	43	118
Canterbury	49	407
Otago/Southland	47	227

Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. Regional TAR scores should be treated as indicative only - they show there is some variance at a regional level, and they provide context for the national TAR score. More detailed insights on regions/communities may be available from Angus & Associates or Regional Tourism Organisations.

Base (YE Mar 2024): NZ residents n=3,113; AU residents n=2,507

*Ireland TAR is based on data collected during Apr-Sep 23 only, from n=2,613 Ireland residents

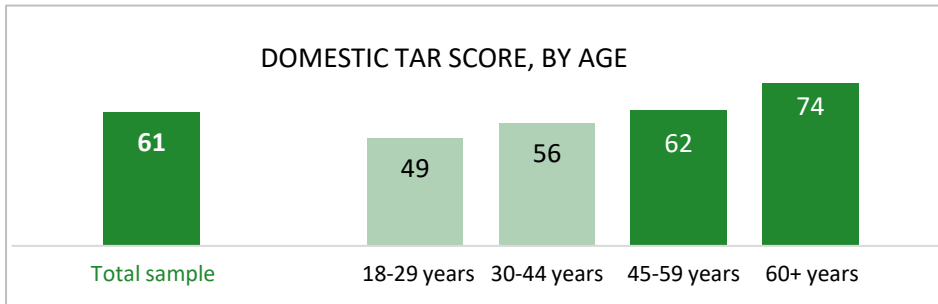
DOMESTIC TOURISM

The vast majority of New Zealand residents (93%) agree that domestic tourism is good for New Zealand and a similar proportion (91%) agree that domestic tourism is good for their region.

At the same time, one in five New Zealand residents (23%) believe that domestic tourism is putting too much pressure on New Zealand. This proportion is higher than it was in the previous year. A similar proportion (22%) believe that domestic tourism is putting too much pressure on their region.

New Zealand’s domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, is more favourable than its international TAR score. New Zealand has a domestic TAR score of 61 – this is 11 points higher than the international TAR score.

As for international tourism, support for domestic tourism has a correlation with age (older residents are more likely to be supportive). The domestic TAR score is also lower than it is for the total sample among those who have not travelled in the past 12 months (at 56). By ethnicity, it is lower than it is for the total sample amongst NZ Māori (at 51), and Chinese and Indian New Zealanders (at 43 and 50 respectively).



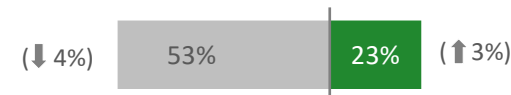
Domestic tourism is good for New Zealand



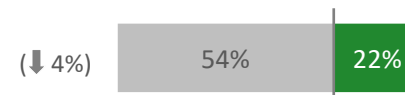
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



Domestic visitors put too much pressure on my region



Disagree* Agree*

Base: Total sample - New Zealand residents n=3,113

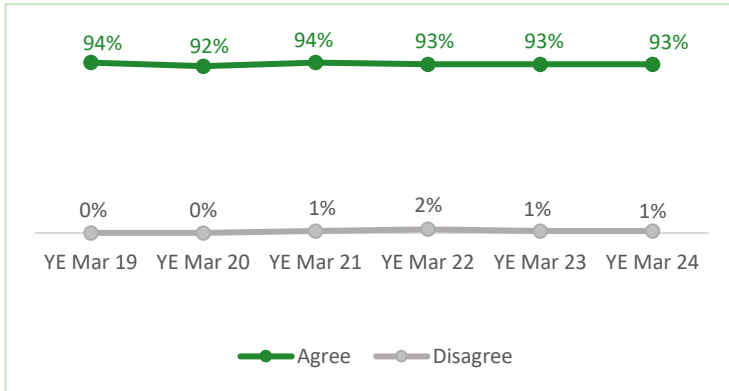
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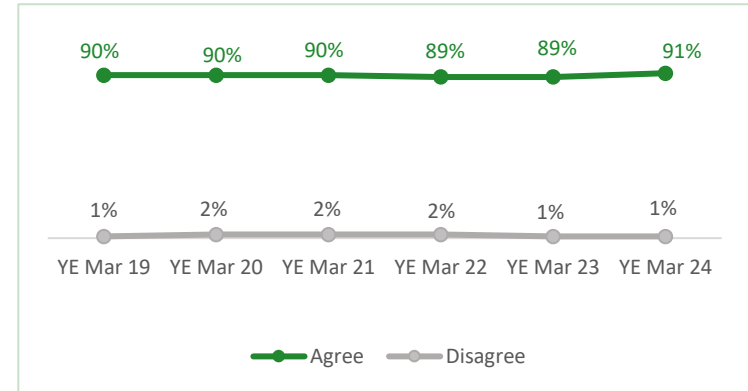
'Neither agree nor disagree' and 'Don't know' responses excluded

DOMESTIC TOURISM

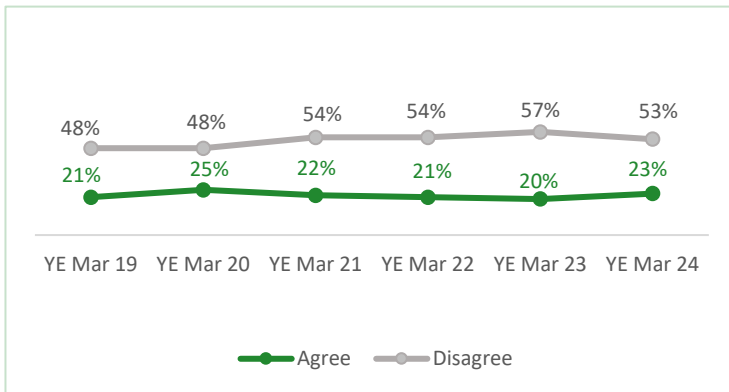
Domestic tourism is good for New Zealand



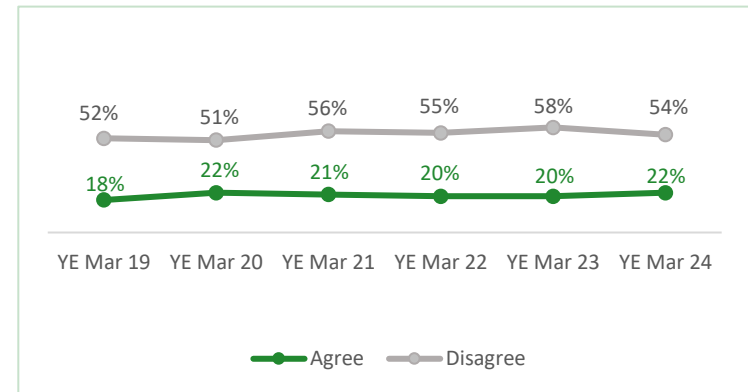
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



Domestic visitors put too much pressure on my region



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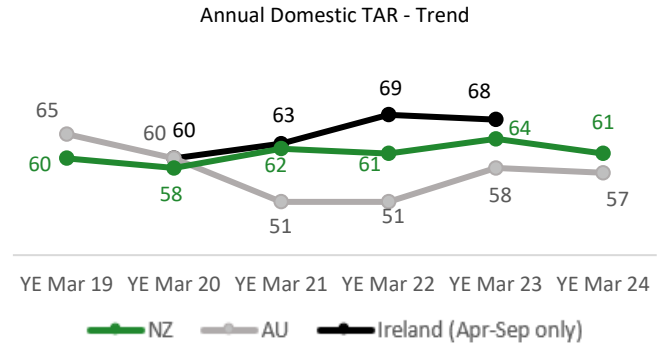
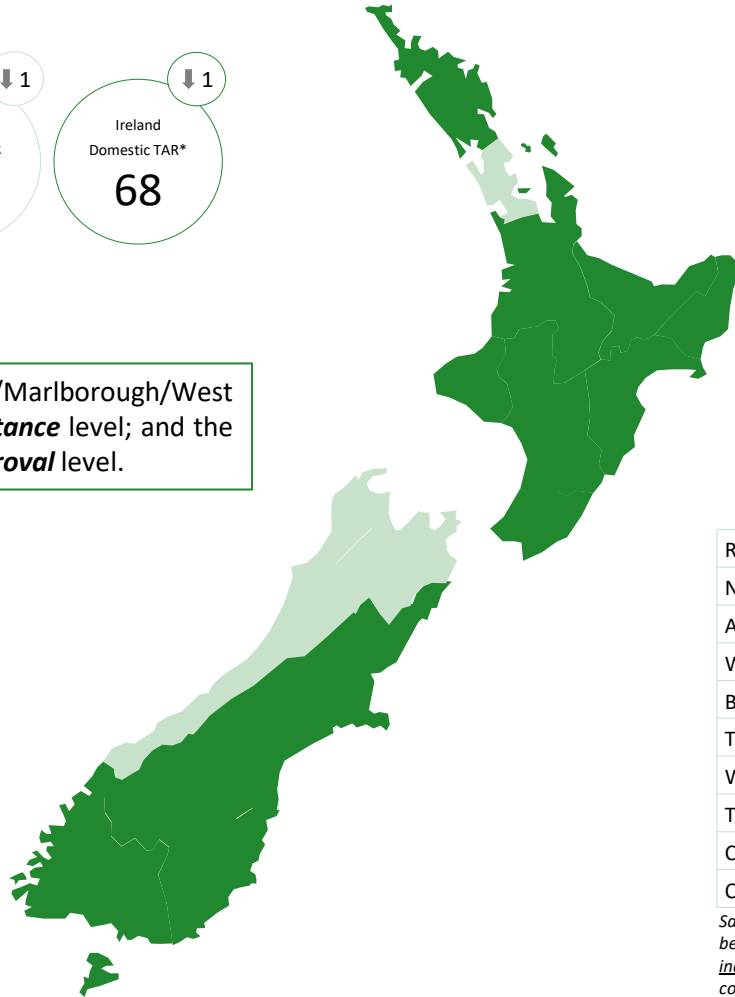
'Neither agree nor disagree' and 'Don't know' responses excluded

DOMESTIC TOURISM (CONT.)



Auckland, and Tasman/Nelson/Marlborough/West Coast are currently at the **acceptance** level; and the rest of NZ is currently at the **approval** level.

- Advocacy
- Approval
- Acceptance
- Limited Acceptance
- Threatened Acceptance
- Disapproval



Region	Domestic TAR	N=
Northland	61	119
Auckland	57	1,003
Waikato	63	298
Bay of Plenty/Gisborne/Hawke's Bay	61	349
Taranaki/Manawatū-Wanganui	62	243
Wellington	66	349
Tasman/Nelson/Marlborough/West Coast	56	118
Canterbury	66	407
Otago/Southland	60	227

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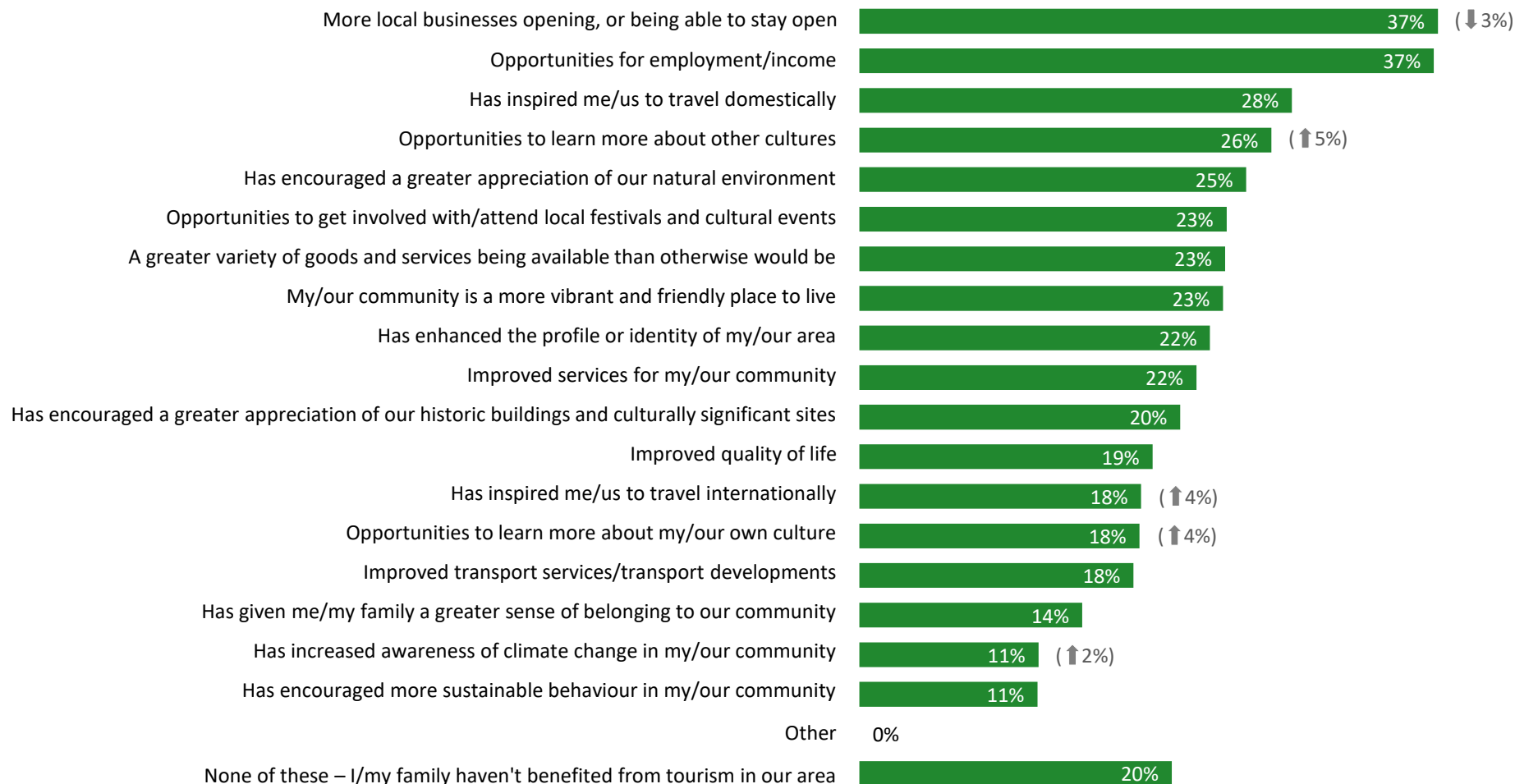


**FELT BENEFITS &
IMPACTS OF
TOURISM ACTIVITY**

BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

80% of New Zealand residents say they personally benefit from tourism activity in their local area in some way.

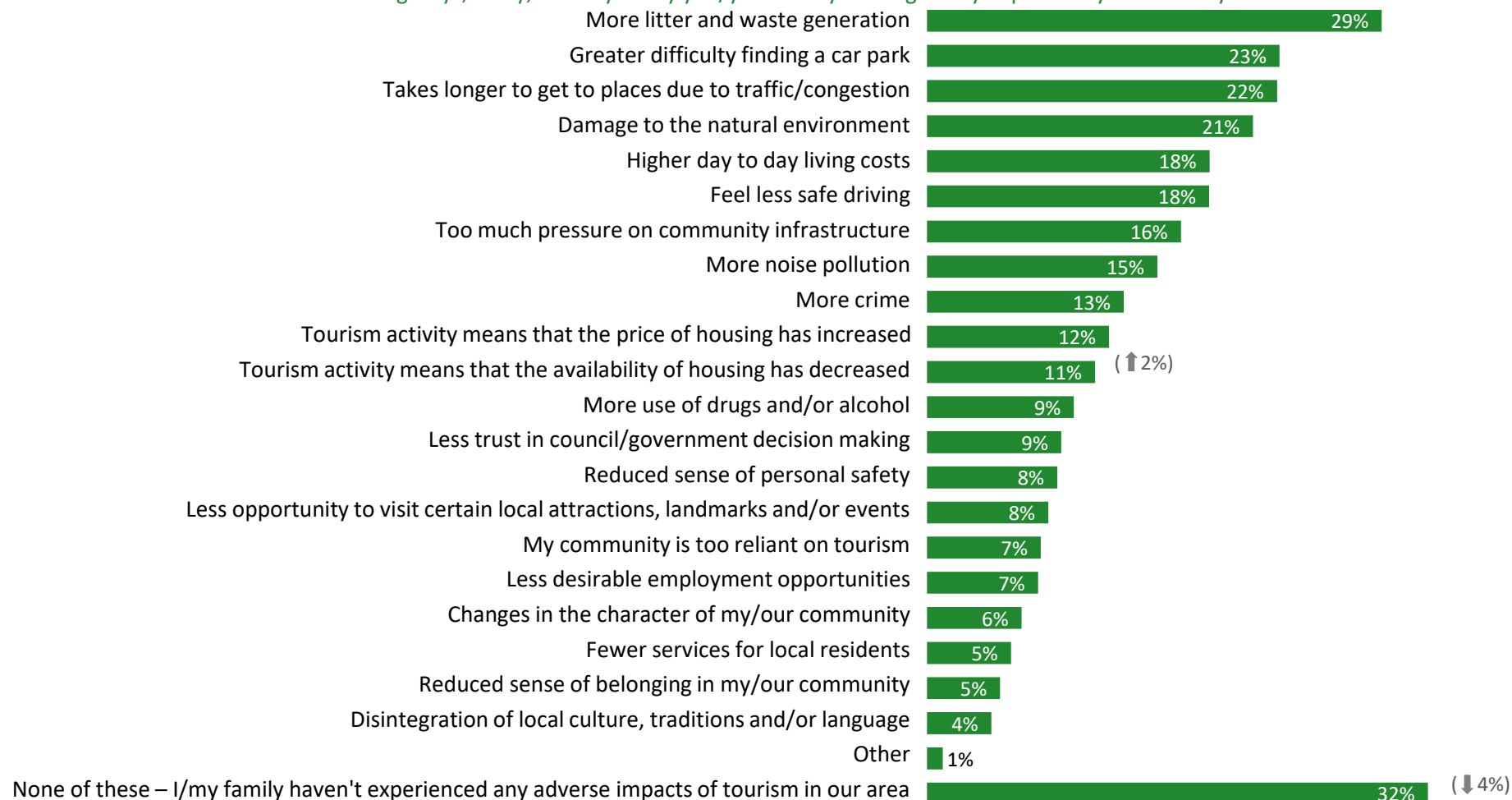
In which of the following ways, if any, would you say you/your family benefit from tourism activity in your local area?



NEGATIVE IMPACTS OF TOURISM ACTIVITY IN LOCAL AREA

In the past year, 68% of New Zealand residents say have been negatively impacted by tourism activity in their local area in some way. The top 10 concerns, and their order, remain the same as a year ago.

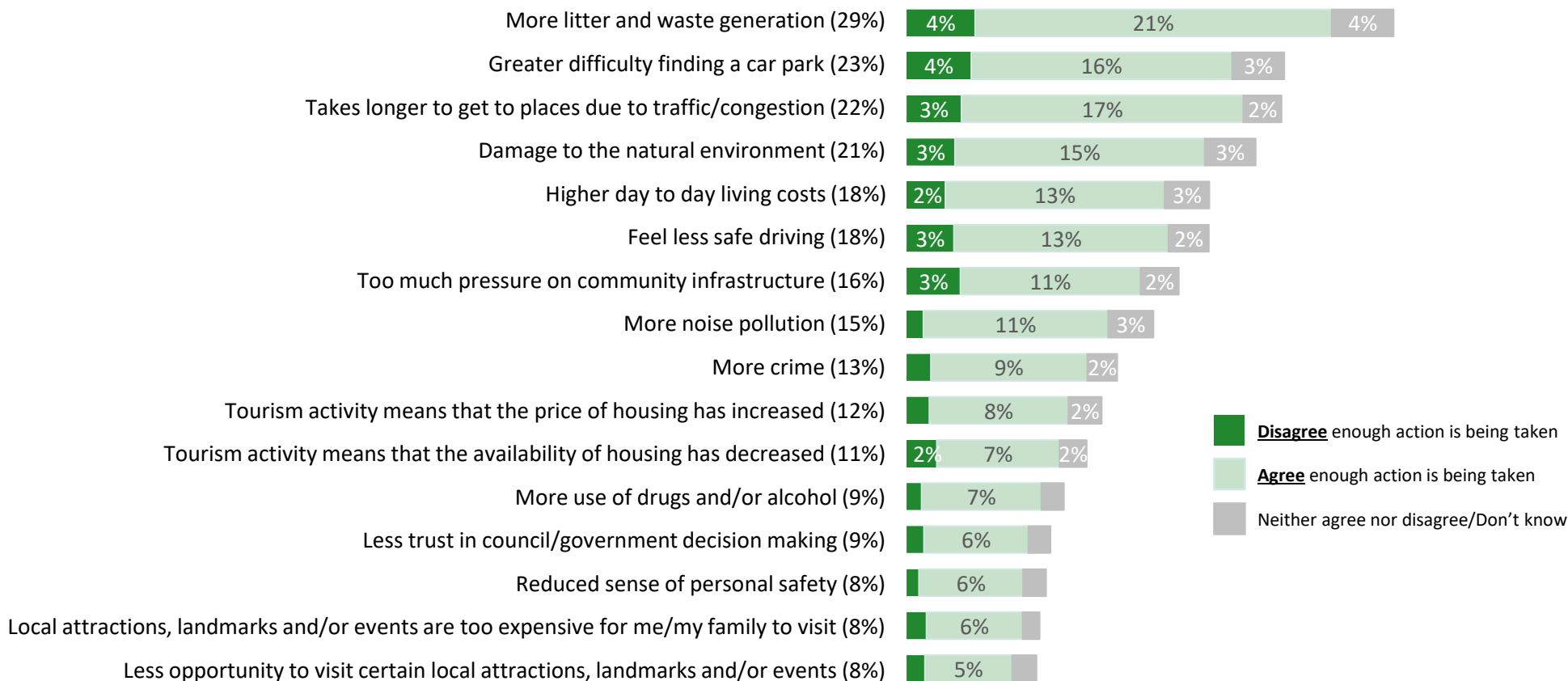
In which of the following ways, if any, would you say you/your family are negatively impacted by tourism in your local area?




ACTION TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM

To what extent do you agree or disagree that enough action is being taken to address these...?

Negative impact (ranked by prevalence)

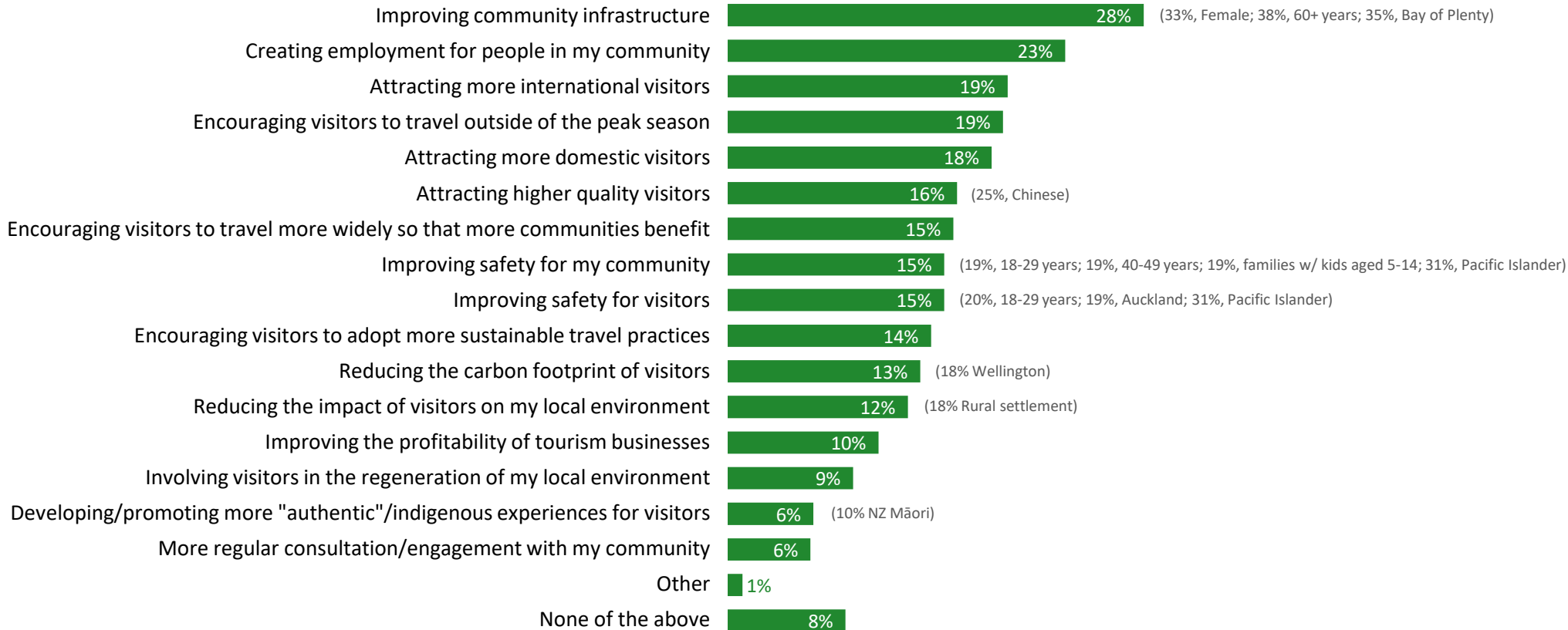




**FUTURE FOCUS
FOR LOCAL
TOURISM INDUSTRY**

FUTURE FOCUS FOR TOURISM INDUSTRY

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

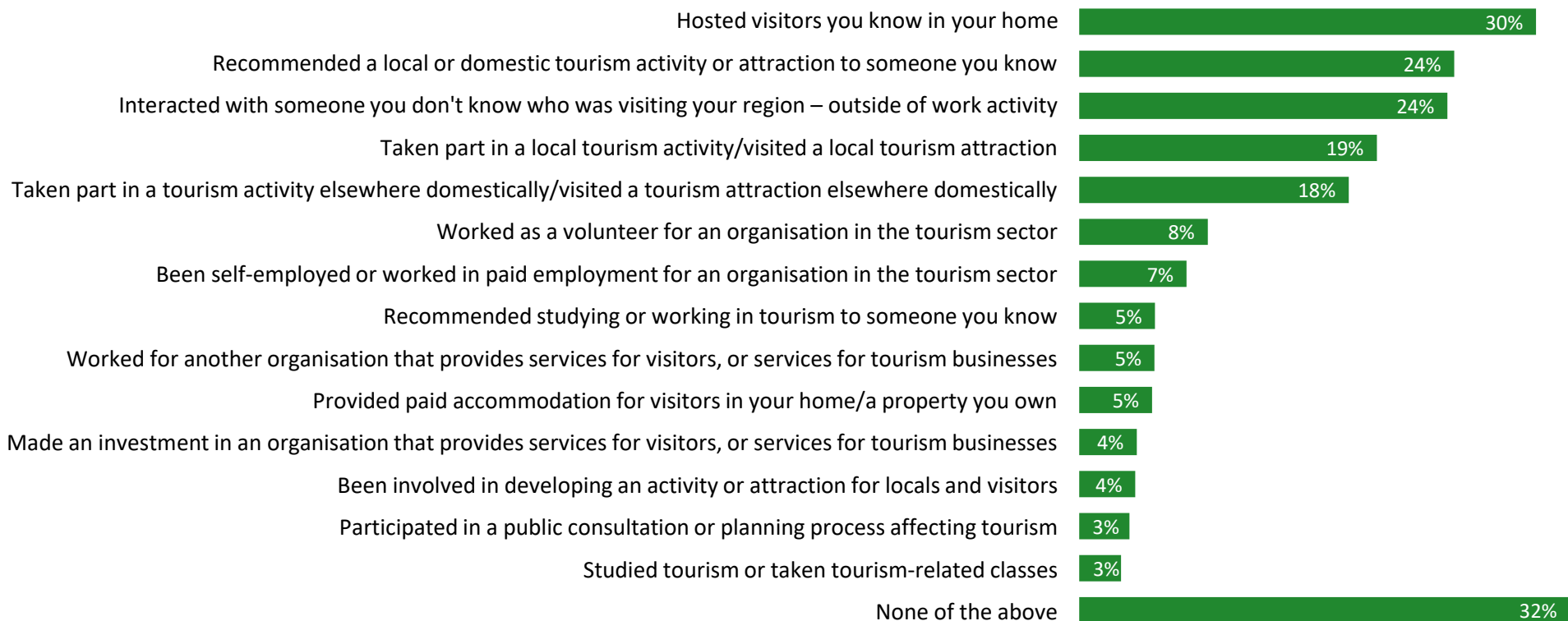





RESIDENT
ENGAGEMENT
ACTIONS WITH
VISITORS


RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

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





6 month READS:
Please bear in
mind that these
questions have
recently been added
and are 6-month
results with seasonal
influence



TOURISM OVERALL
(6 month read)

TOURISM (Overall)

The vast majority of New Zealand residents (95%) agree that tourism is good for New Zealand; however, a slightly smaller proportion (88%) agree that tourism is good for their region.

Despite the benefits of tourism being widely acknowledged by New Zealand residents, one third (35%) believe that visitors put too much pressure on New Zealand, and one fourth (27%) believe that visitors put too much pressure on their region.

The TAR score for tourism overall, which considers the positive and negative impacts of tourism, is at the level of ‘acceptance’ for New Zealand residents (at 51).

By age, younger New Zealand residents view tourism less favourably than older age groups. The tourism TAR score is also lower than it is for the total sample among Chinese, Indian and Māori New Zealanders, at respectively 31, 41 and 45.

Tourism is good for New Zealand



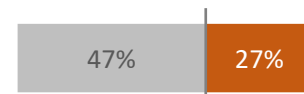
Tourism is good for my region



Visitors are putting too much pressure on New Zealand

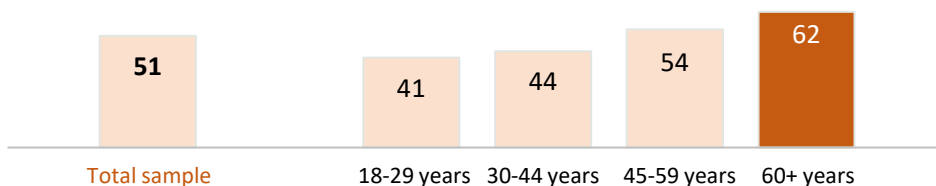


Visitors are putting too much pressure on my region




Disagree* Agree*

TOURISM TAR SCORE, BY AGE



Base (Oct 23 – Mar 24): Total sample – New Zealand residents n=1,502

*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded



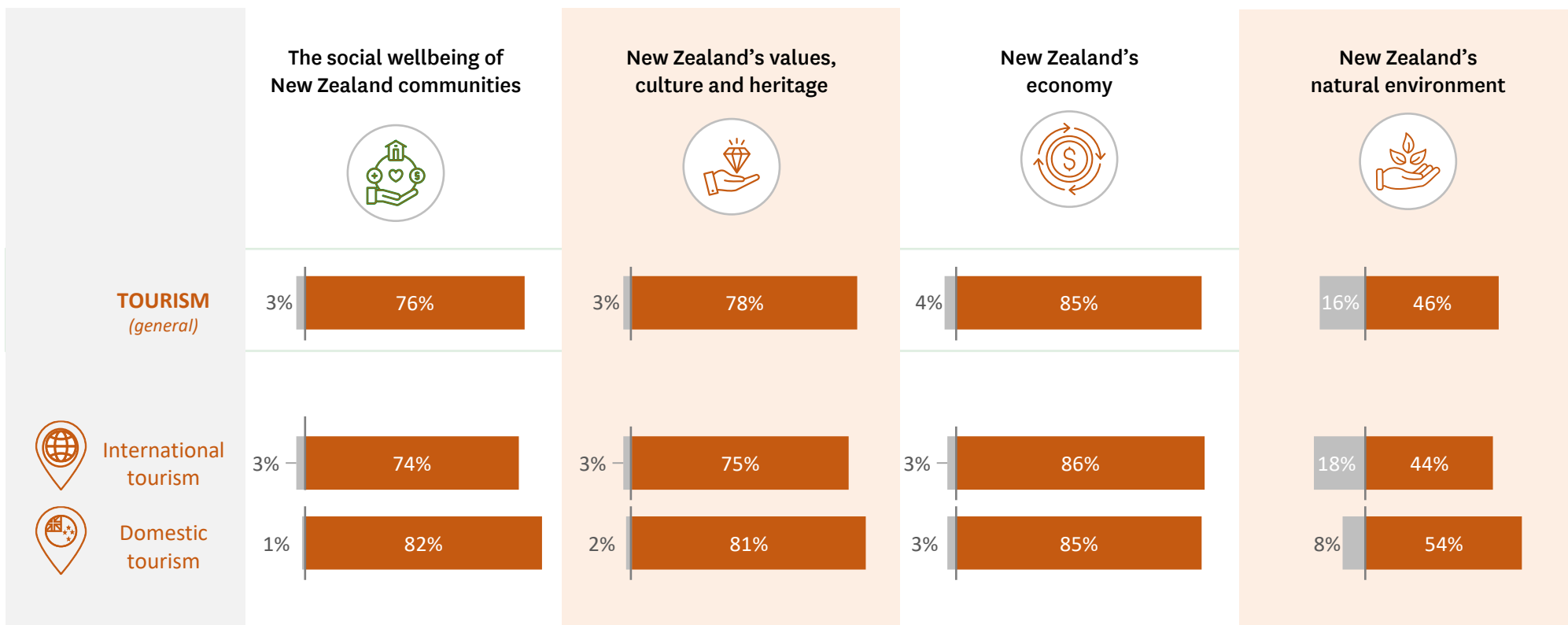
IMPACTS OF
TOURISM BASED ON
SOCIETY, CULTURE,
ECONOMY, AND
NATURE
(6 month read)

VIEWS ON TOURISM: NEW ZEALAND (YE MAR 2024)

POSITIVE / NEGATIVE IMPACTS OF TOURISM

NZ residents think tourism has the most positive impact on the economy and the most negative impact on the natural environment.

Thinking about the positive or negative impacts of tourism, what impacts would you say tourism has on...



Negative* Positive*

Base (Oct 23 – Mar 24): Total sample – New Zealand residents n=1,502
 *Negative = Very negative + Negative; Positive = Very positive + Positive;
 'Neither positive nor negative' responses excluded

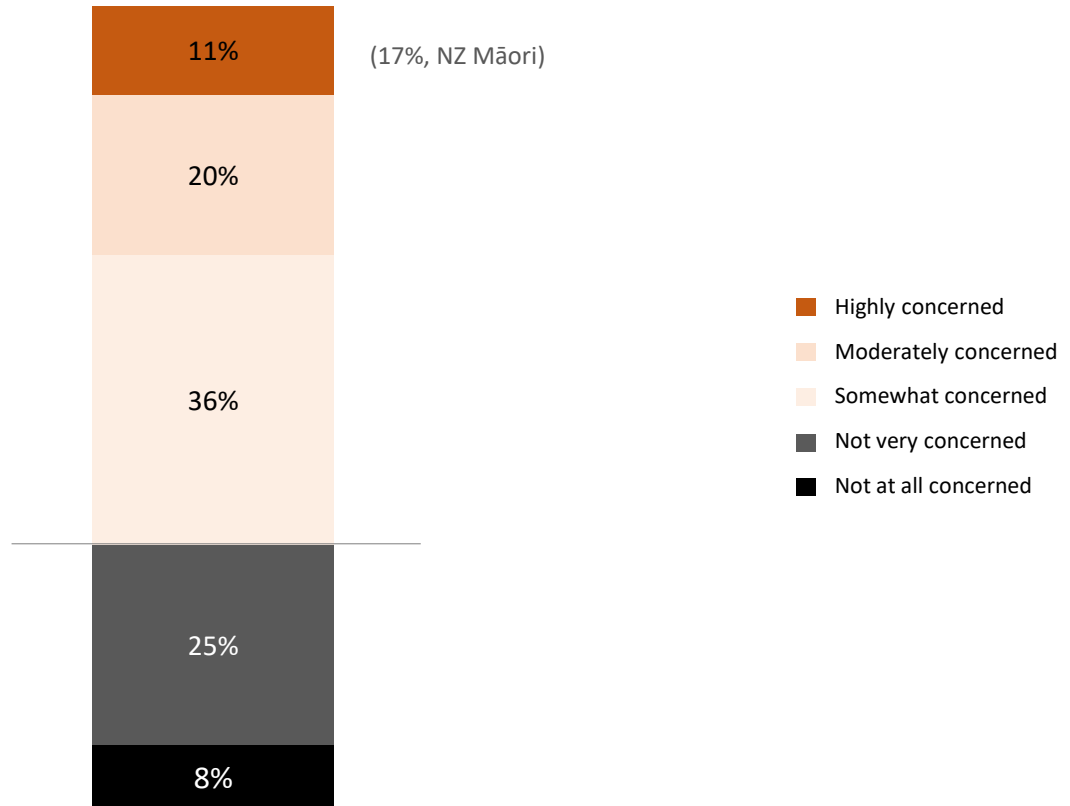


**ENVIRONMENTAL
IMPACTS OF
TOURISM
(6 month read)**

CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

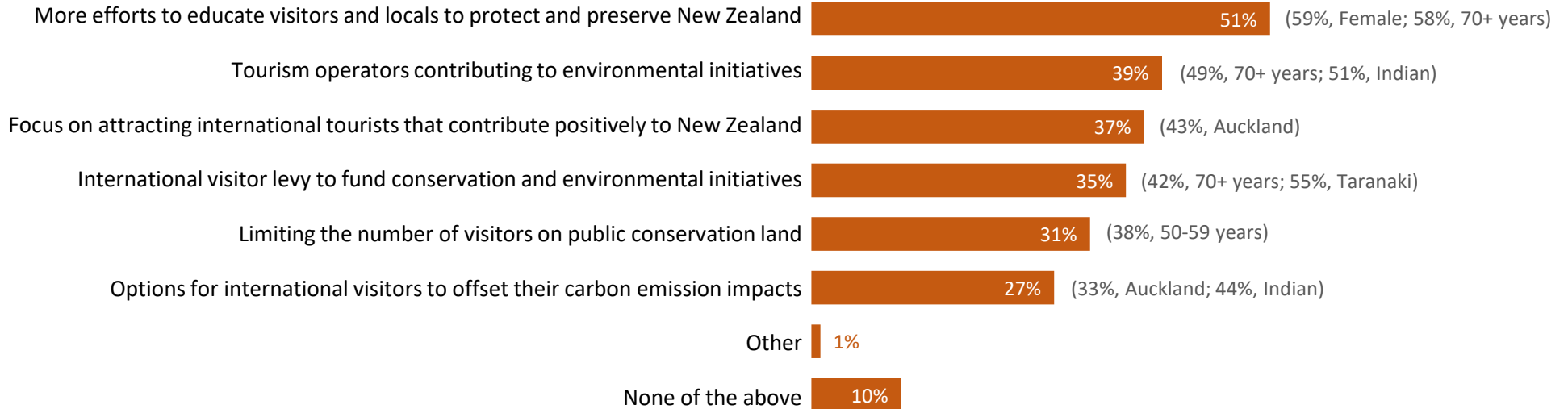
Oct 23 –
Mar 24


How concerned are you with any impact tourism could be having on New Zealand's natural environment?



MEASURES TO MITIGATE ENVIRONMENTAL IMPACTS

What measures would you like to see in place to mitigate environmental impacts of tourism?





**FUTURE FOCUS
FOR LOCAL
TOURISM INDUSTRY
(6 month read)**

FUTURE FOCUS FOR TOURISM INDUSTRY

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





SAMPLE PROFILE

SAMPLE PROFILE

Gender	
Male	49%
Female	51%
Gender diverse / Prefer not to say	0%
Age	
18 – 29 years	21%
30 – 39 years	17%
40 – 49 years	17%
50 – 59 years	18%
60 – 69 years	12%
70+ years	15%
Travel in Past 12 Months	
Travelled around New Zealand	73%
Travelled to Australia	18%
Travelled overseas (outside of Australasia)	21%
Have not travelled	18%
Base: Total sample	n=3,113

Region	
Northland	4%
Auckland	32%
Waikato	10%
Bay of Plenty	7%
Gisborne	1%
Hawke's Bay	4%
Taranaki	2%
Manawatū-Whanganui	5%
Wellington (& Wairarapa)	11%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	1%
Canterbury	13%
Otago	6%
Southland	2%
Base: Total sample	n=3,113

Ethnicity	
New Zealand European	68%
Other European	6%
New Zealand Māori	12%
Cook Island Māori	1%
Indian	5%
Chinese	3%
Pacific Islander	3%
Other	11%
Household Composition	
My husband, wife or partner	56%
My mother and/or father	7%
My child/children aged under 5	12%
My child/children aged 5 - 14	18%
My child/children aged 15+	14%
Other family/relatives	10%
Other person(s)	8%
None of the above - I live alone	16%
Prefer not to say	1%
Base: Total sample	n=3,113