



VIEWS ON TOURISM[©] PROGRAMME

VIEWS ON TOURISM: NEW ZEALAND

YEAR ENDING DECEMBER 2024

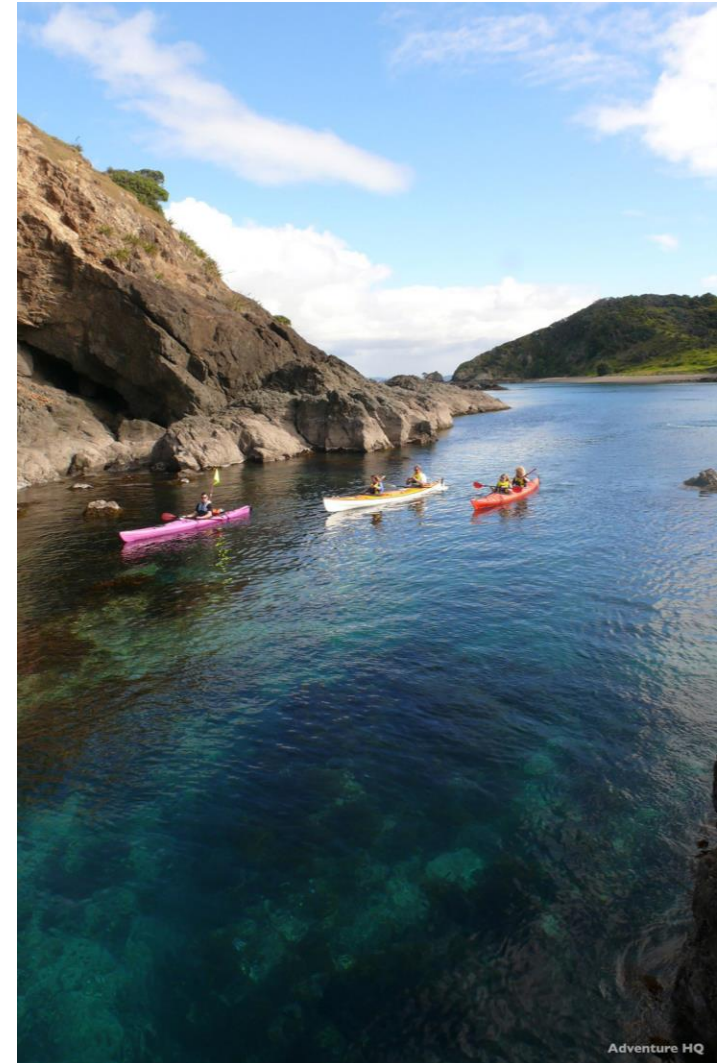
INTRODUCTION

This report captures findings from questions included in Views on Tourism® research conducted from **January 2024 to December 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 was 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). Information from the expanded survey is available in this report based on a full-year dataset.

From 1 July 2024, the wording of the question concerning whether sufficient action is being taken on negative impacts has changed. Results are therefore reported for the two most recent quarters only (July - December 2024) and presented in an orange colour palette to distinguish this data from results based on the full year's sample (January 2024 to December 2024).



METHODOLOGY

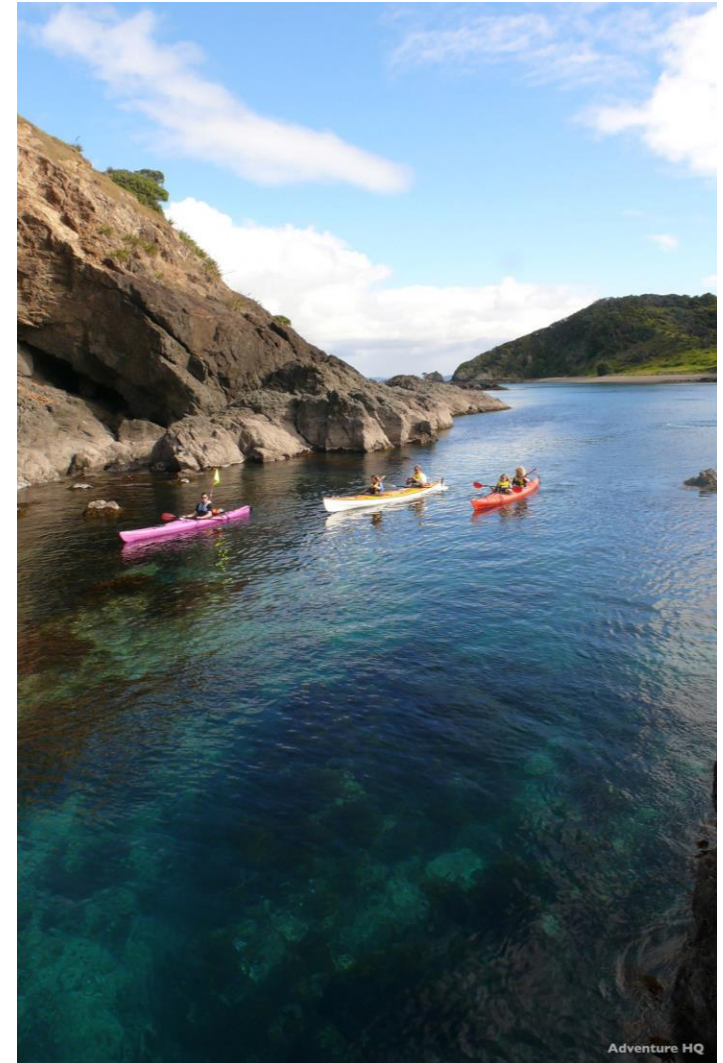
The research is undertaken with a representative (by age, gender and region) sample of at least n=250 New Zealand residents each month. The sample is collected continuously through the year and accumulates to at least n=3,000 on an annual basis.

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



Tourism benefits & impacts

Seven in ten New Zealand residents have engaged with tourism/visitors in some way during the past two years.

More than four in five New Zealand residents (82%) personally **benefited** from tourism activity in their local area in the year ending December 2024, an increase of 2% compared with the year prior. The most commonly felt benefits are consistent with previous years - with the top two being more local businesses opening or being able to stay open (38%) and opportunities for employment/income (37%).

In the year to December 2024, more than seven in ten New Zealand residents said they had been **negatively impacted** by tourism activity in their local area in some way. This is 7% higher than the previous year (72%, up from 65%). The top two concerns remain consistent – more litter and waste generation, and greater difficulty finding a car park.

South Island residents have a higher level of engagement with tourism than North Islanders, with Otago/Southland residents having the highest levels of engagement overall.

In the North Island, residents of Northland are more likely to feel benefits of tourism, while Wellingtonians are less likely to feel the adverse impacts of tourism than are residents of other regions.

KEY INSIGHTS (CONT.)



Tourism Approval Ratings (TAR)

For the year ending December 2024, 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 48).

Both the international and domestic TAR scores have fallen by four points compared with YE December 2023 - currently at 47 and 57, respectively. This decrease in TAR scores corresponds with a significant increase in the proportion of those who agree that both international and domestic visitors put too much pressure on New Zealand and on their region, compared with the previous year. And yet, eight in ten New Zealanders also feel the **benefits** of tourism in their local area, which suggests that the recovery and growth of tourism needs to be balanced with community perceptions of pressure.

By ethnicity of New Zealand residents, ‘other European’ residents show the most support for tourism with the highest TAR scores – overall (61), international (59) and domestic (70). Cook Islands Māori, Chinese and NZ Māori are the least favourable towards tourism, with lower TAR scores than other ethnic groups.

In terms of regional differences, most regions are at the level of ‘acceptance’ for overall and international tourism, except for Otago/South which is one level lower, at the ‘limited acceptance’ level.

For domestic tourism, Wellington and Canterbury are at the approval level, while every other region is at the acceptance level.

Views on Tourism Snapshot: New Zealand Residents

Research was conducted between January 2024 and December 2024 using Angus & Associates' Views on Tourism© programme. The sample includes n=3,195 New Zealand residents aged 18+ years.

TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism

Overall TAR:

International TAR:

Domestic TAR:



| Overall TAR: | | | International TAR: | | | Domestic TAR: | | |
|--------------|-----------|---------|--------------------|-----------|---------|---------------|-----------|---------|
| New Zealand | Australia | Ireland | New Zealand | Australia | Ireland | New Zealand | Australia | Ireland |
| 48 | 52 | 65 | 47 (-4) | 50 | 61 (-4) | 58 (-4) | 56 (-1) | 69 (-1) |

82% 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
- Opportunities to learn more about other cultures
- Inspired them to travel domestically
- Greater appreciation of the natural environment

73% 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
- Feel less safe driving

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
- Attracting more domestic visitors
- Encouraging visitors to travel outside the peak season

A scenic view of a beach framed by large trees, with a white circle containing text overlaid on the left side. The background shows a sandy beach, blue water, and a clear sky. Two people are visible walking on the beach. The text is centered within the white circle.

OVERALL SENTIMENT
TOWARDS TOURISM
ACTIVITY

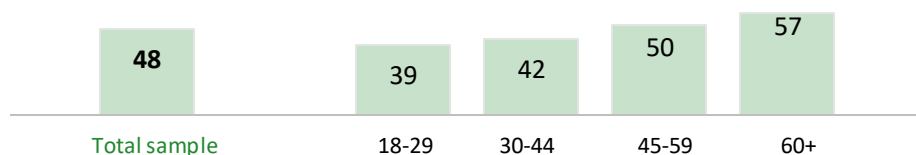
OVERALL TOURISM

While the vast majority of New Zealand residents agree that tourism is good for New Zealand (94%) and/or for their region (88%), more than one third (37%) believe that visitors put too much pressure on New Zealand, and three in ten (31%) believe that visitors put too much pressure on their region.

For the year ending December 2024, 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 48). 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 Cook Island Māori (31), Chinese (33) and NZ Māori (39).

Tourism TAR Score, By Age



| Ethnicity | Overall TAR | N= |
|-------------------|-------------|-------|
| NZ European | 49 | 2,161 |
| Other European | 61 | 215 |
| NZ Māori | 39 | 353 |
| Cook Island Māori | 31 | 45 |
| Indian | 45 | 153 |
| Chinese | 33 | 109 |
| Pacific Islanders | 47 | 96 |
| Other ethnicities | 49 | 411 |

Tourism is good for New Zealand



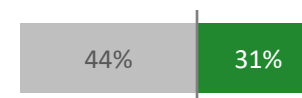
Tourism is good for my region



Visitors put too much pressure on New Zealand



Visitors put too much pressure on my region



Disagree* Agree*

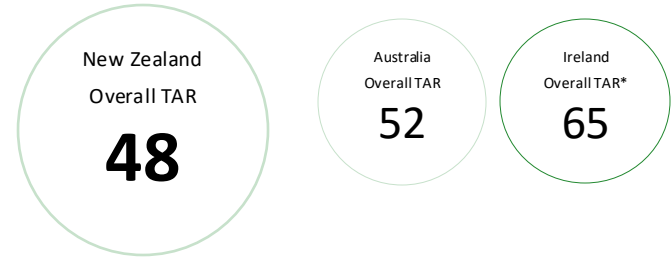
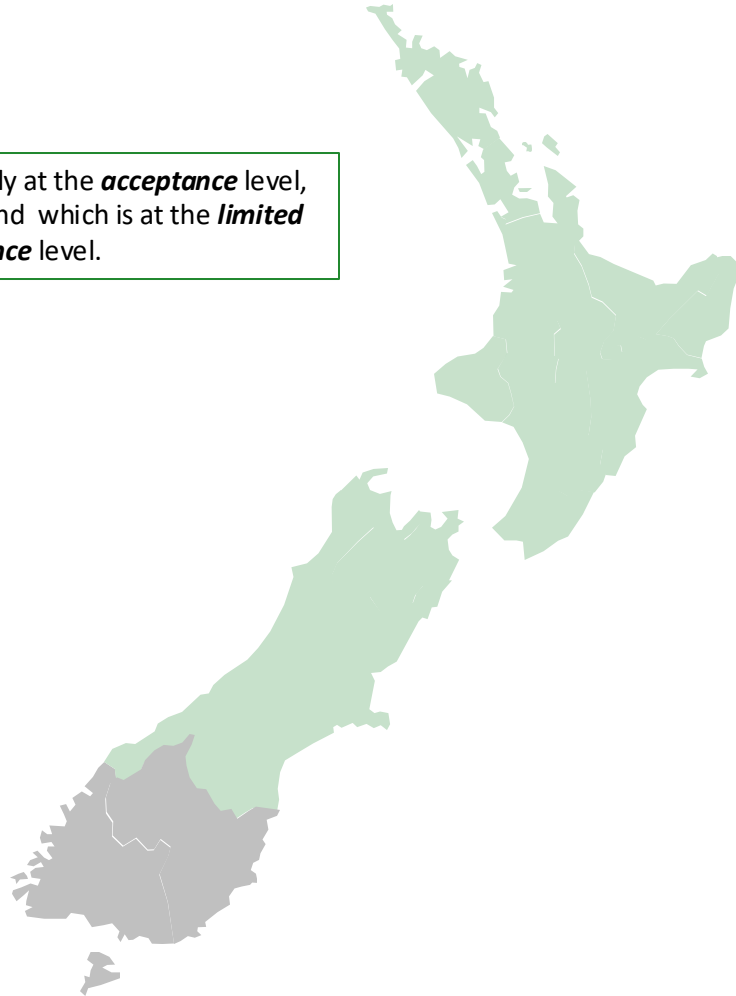
Base: Total sample - New Zealand residents n=3,195

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

OVERALL TOURISM (CONT.)

Every NZ region is currently at the **acceptance** level, except for Otago/Southland which is at the **limited acceptance** level.

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



| Region | Overall TAR | N= |
|--------------------------------------|-------------|-------|
| Northland | 47 | 117 |
| Auckland | 49 | 1,011 |
| Waikato | 51 | 288 |
| Bay of Plenty/Gisborne/Hawke's Bay | 48 | 387 |
| Taranaki/Manawatu-Wanganui | 48 | 228 |
| Wellington | 54 | 333 |
| Tasman/Nelson/Marlborough/West Coast | 43 | 125 |
| Canterbury | 47 | 391 |
| Otago/Southland | 36 | 315 |

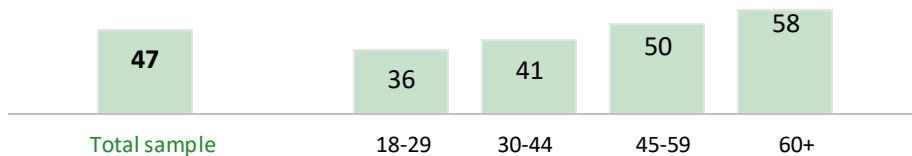
Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. Regional TAR scores should be treated as indicative only - they show there is some variance at a regional level, and they provide context for the national TAR score. More detailed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

INTERNATIONAL TOURISM

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 47). This is 4 points lower than in YE December 2023. This might be explained by the significant increase in the proportion of those who believe that international visitors put too much pressure on New Zealand and in the proportion that believe international visitors put too much pressure on their region. By age, younger New Zealand residents view international tourism less favourably than older age groups.

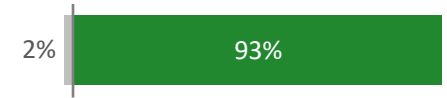
Similar to the overall TAR score, the international TAR score is also lower than it is for the total sample among Cook Island Māori (24), Chinese (33) and NZ Māori (35).

International TAR Score, By Age



| Ethnicity | International TAR | N= |
|-------------------|-------------------|-------|
| NZ European | 49 | 2,161 |
| Other European | 59 | 215 |
| NZ Māori | 35 | 353 |
| Cook Island Māori | 24 | 45 |
| Indian | 47 | 153 |
| Chinese | 33 | 109 |
| Pacific Islanders | 44 | 96 |
| Other ethnicities | 49 | 411 |

International tourism is good for New Zealand



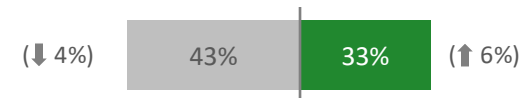
International tourism is good for my region



International visitors put too much pressure on New Zealand



International visitors put too much pressure on my region



Disagree* Agree*

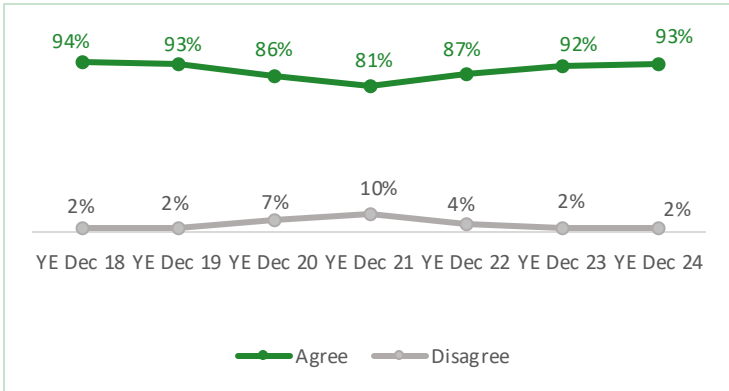
Base: Total sample - New Zealand residents n=3,195

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

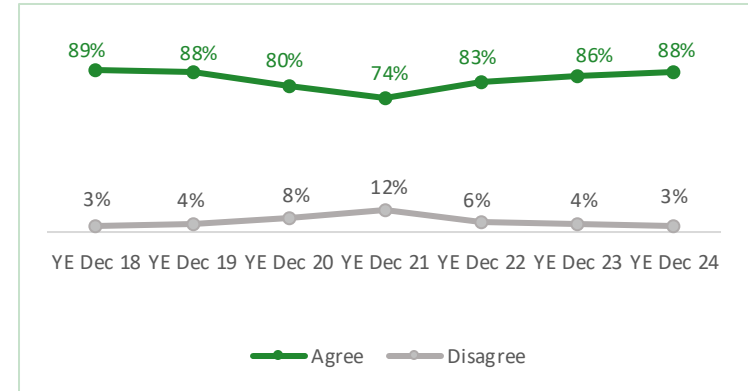
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INTERNATIONAL TOURISM (CONT.)

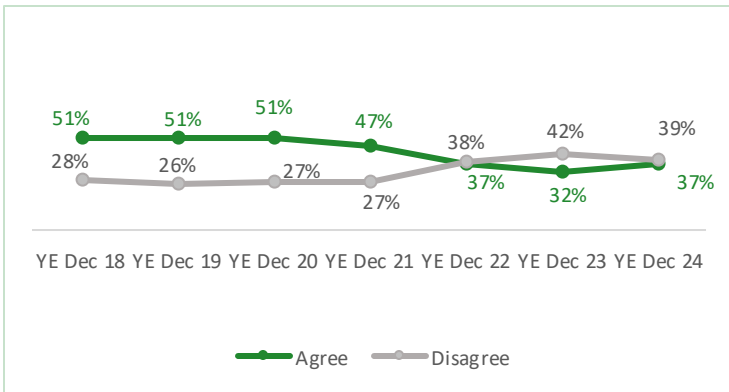
International tourism is good for New Zealand



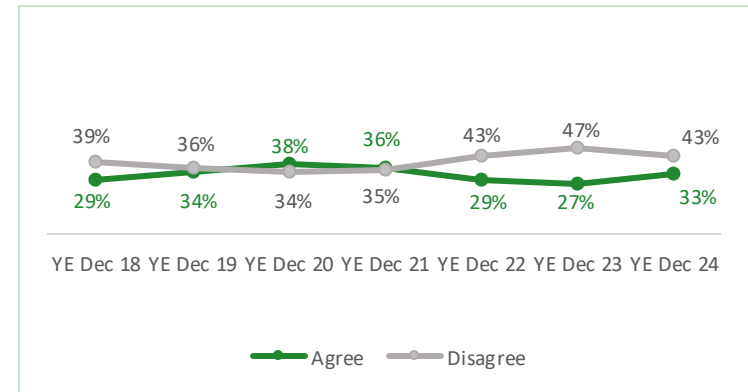
International tourism is good for my region



International visitors put too much pressure on New Zealand



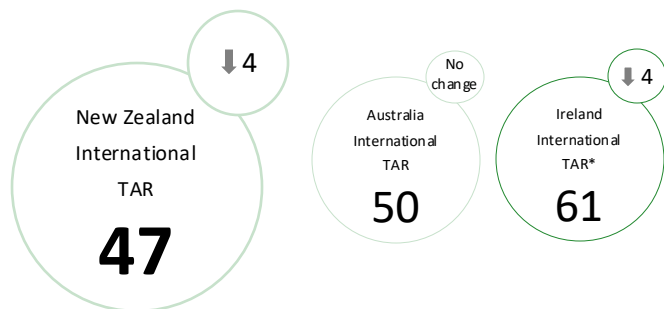
International visitors put too much pressure on my region



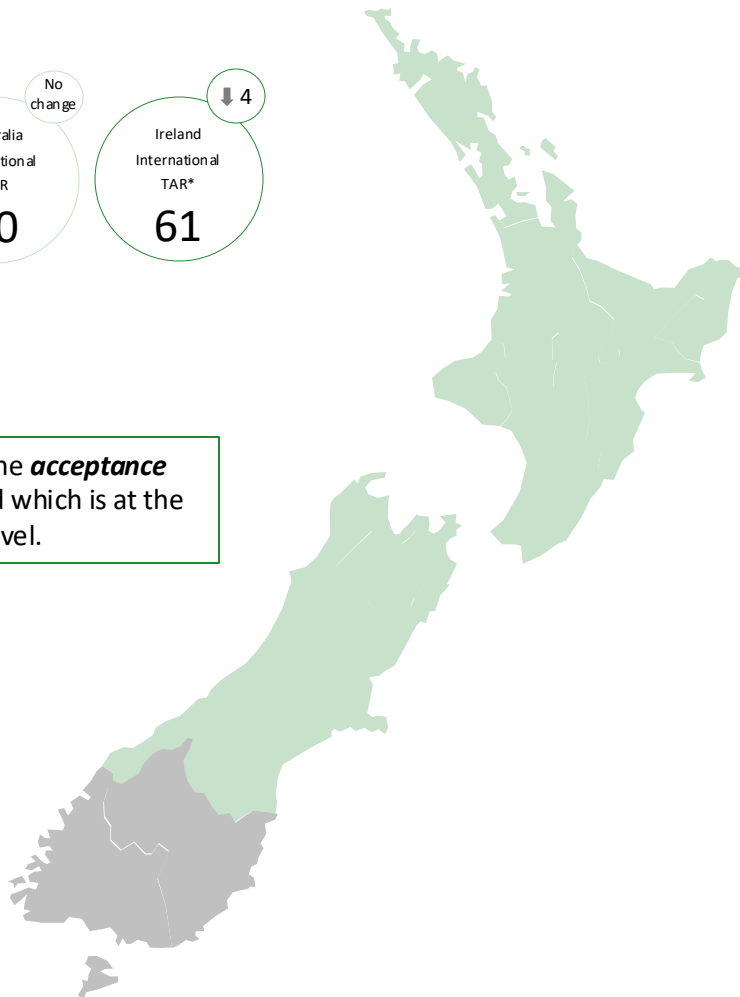
Base: Total sample - New Zealand residents: YE Dec 18 (n=2,509); YE Dec 19 (n=2,601); YE Dec 20 (n=3,034); YE Dec 21 (n=3,075); YE Dec 22 (n=3,192); YE Dec 23 (n=3,173); YE Dec 24 (n=3,195)

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

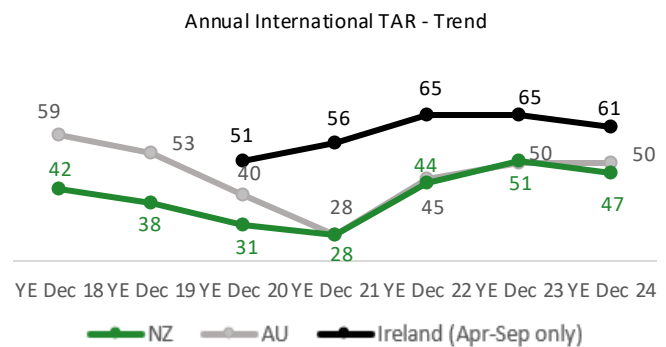
INTERNATIONAL TOURISM (CONT.)



Every NZ region is currently at the **acceptance** level, except for Otago/Southland which is at the **limited acceptance** level.



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



| Region | International TAR | N= |
|--------------------------------------|-------------------|-------|
| Northland | 49 | 117 |
| Auckland | 50 | 1,011 |
| Waikato | 48 | 288 |
| Bay of Plenty/Gisborne/Hawke's Bay | 50 | 387 |
| Taranaki/Manawatu-Wanganui | 45 | 228 |
| Wellington | 50 | 333 |
| Tasman/Nelson/Marlborough/West Coast | 42 | 125 |
| Canterbury | 45 | 391 |
| Otago/Southland | 34 | 315 |

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.

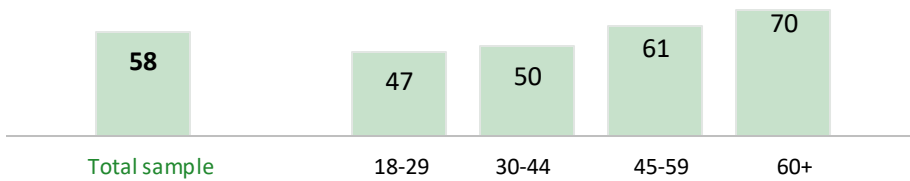
DOMESTIC TOURISM

While the level of agreement remains high among New Zealand residents that domestic tourism is good for New Zealand as well as for their region, there is a significant change in views on the pressure that domestic visitors place on New Zealand and on the regions.

New Zealand’s domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, has fallen to 58, down from 62 in the previous 12-month period. As for international tourism, support for domestic tourism has a correlation with age (older residents are more likely to be supportive).

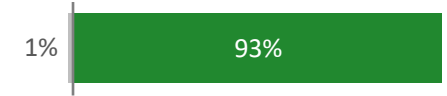
The domestic TAR score is lower than it is for the total sample amongst among Chinese (42), Cook Island Māori (47) and NZ Māori (49).

Domestic TAR Score, By Age



| Ethnicity | Domestic TAR | N= |
|-------------------|--------------|-------|
| NZ European | 61 | 2,161 |
| Other European | 70 | 215 |
| NZ Māori | 49 | 353 |
| Cook Island Māori | 47 | 45 |
| Indian | 53 | 153 |
| Chinese | 42 | 109 |
| Pacific Islanders | 55 | 96 |
| Other ethnicities | 57 | 411 |

Domestic tourism is good for New Zealand



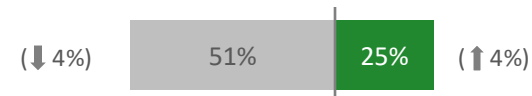
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



Domestic visitors put too much pressure on my region



Disagree* Agree*

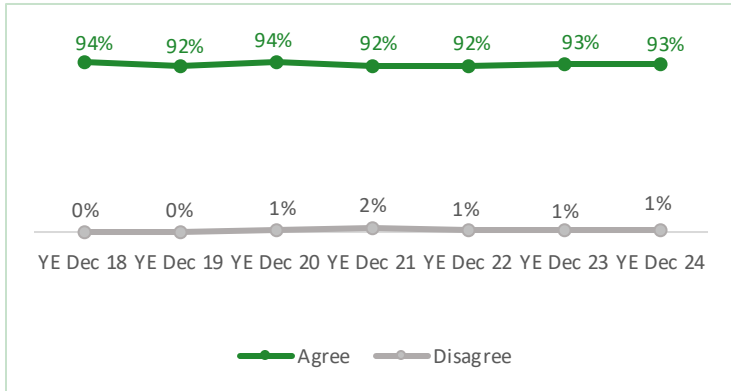
Base: Total sample - New Zealand residents n=3,195

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

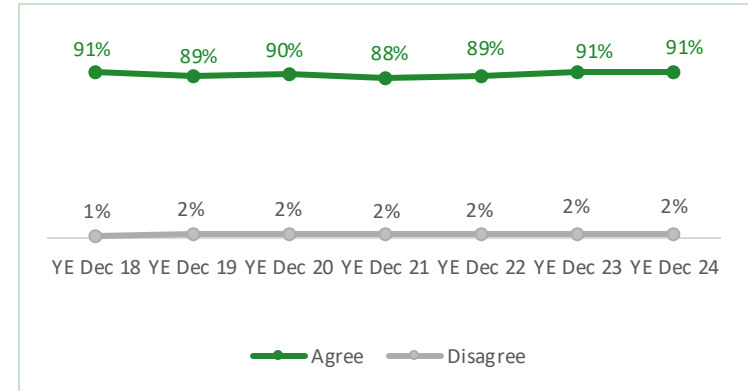
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DOMESTIC TOURISM (CONT.)

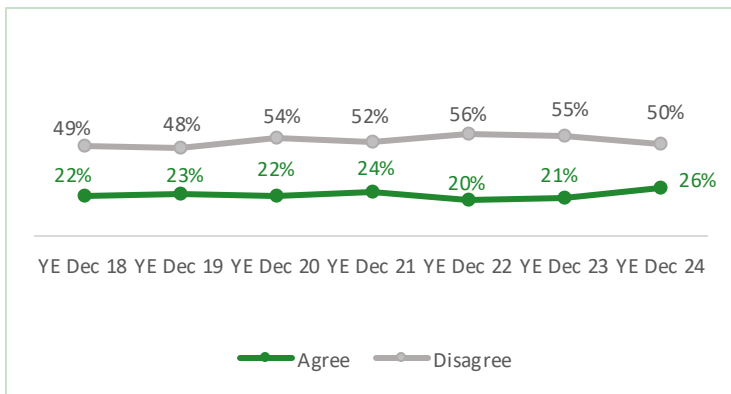
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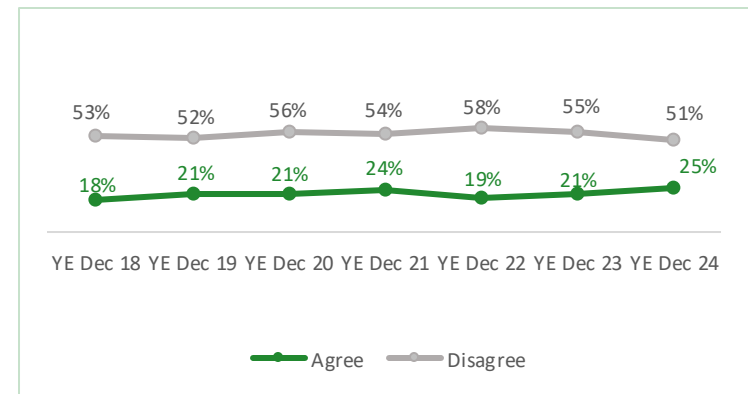
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



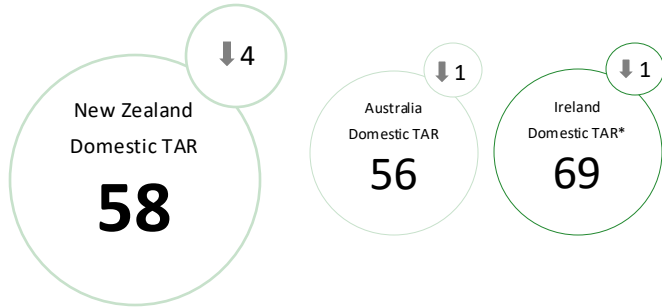
Domestic visitors put too much pressure on my region



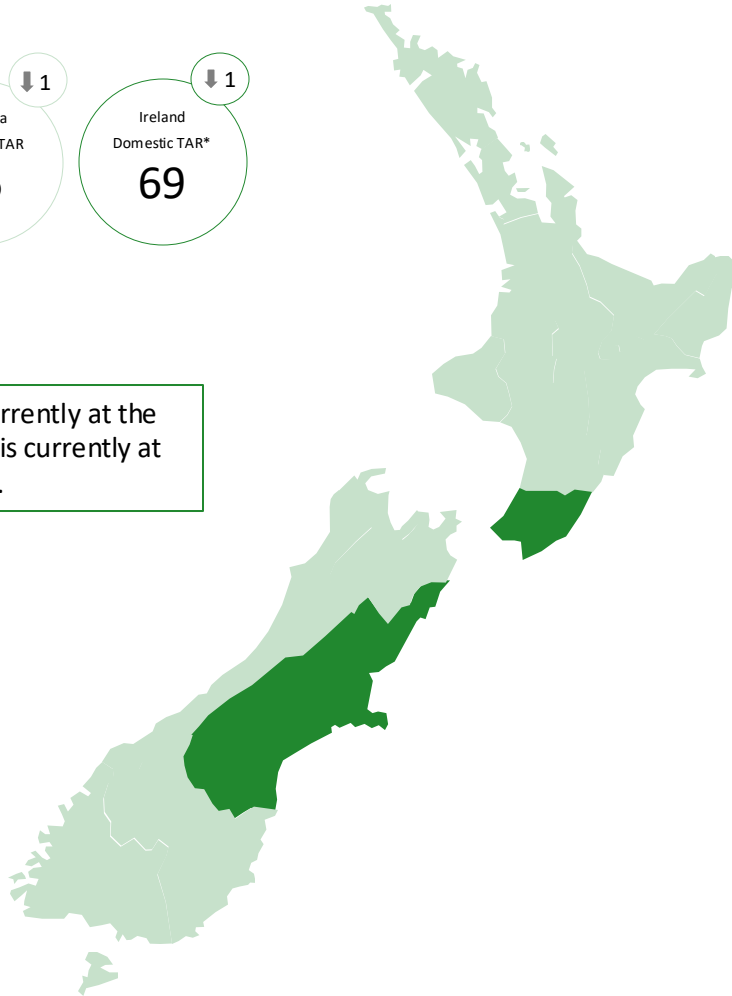
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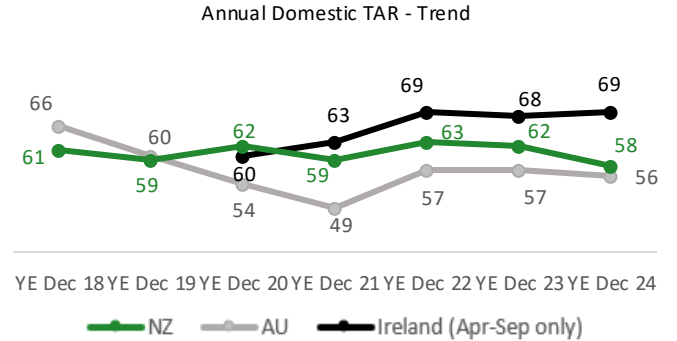
DOMESTIC TOURISM (CONT.)



Wellington and Canterbury are currently at the **approval** level; and the rest of NZ is currently at the **acceptance** level.




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



| Region | Domestic TAR | N= |
|--------------------------------------|--------------|-------|
| Northland | 55 | 117 |
| Auckland | 57 | 1,011 |
| Waikato | 56 | 288 |
| Bay of Plenty/Gisborne/Hawke's Bay | 54 | 387 |
| Taranaki/Manawatu-Wanganui | 56 | 228 |
| Wellington | 63 | 333 |
| Tasman/Nelson/Marlborough/West Coast | 57 | 125 |
| Canterbury | 63 | 391 |
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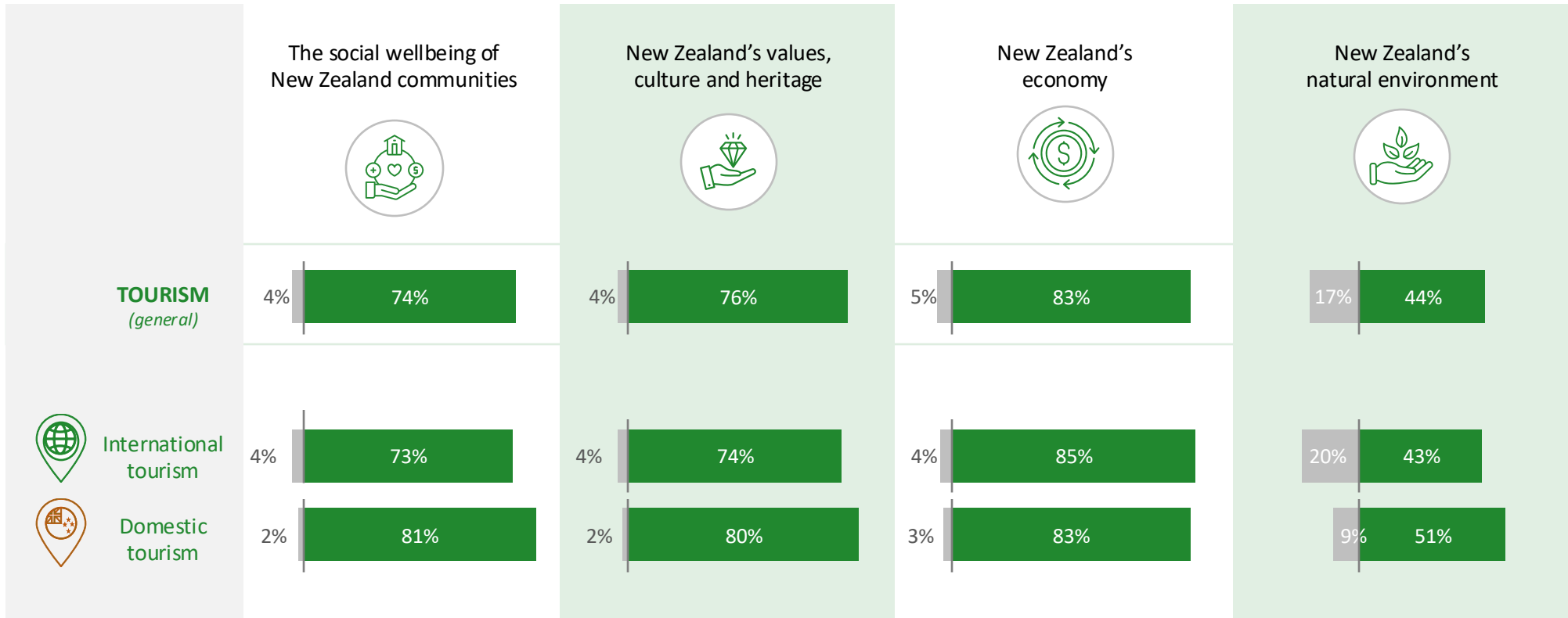
A scenic view of a beach framed by large trees, with a white circle containing text overlaid on the left side. The background shows a sandy beach, blue water, and a clear sky. Two people are walking on the beach in the distance. The text is centered within the white circle.

IMPACTS OF
TOURISM BASED ON
THE FOUR CAPITALS

POSITIVE / NEGATIVE IMPACTS OF TOURISM

New Zealand residents think tourism has the most positive impact on the economy and the most negative impact on the natural environment. The proportion seeing a positive impact has declined slightly in every category since 2023.

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



Negative* Positive*

Base (YE Dec 2024): Total sample - New Zealand residents n=3,195
 *Negative = Very negative + Negative; Positive = Very positive + Positive;
 'Neither positive nor negative' responses excluded

A scenic view of a beach framed by large trees, with a white circle containing text overlaid on the left side. The background shows a sandy beach, blue water, and a clear sky. Two people are visible walking on the beach in the distance. The text is centered within the white circle.

FELT BENEFITS &
IMPACTS OF
TOURISM ACTIVITY

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?

82% of NZ residents report having experienced one or more benefits of tourism activity in their local area (↑ 2%)



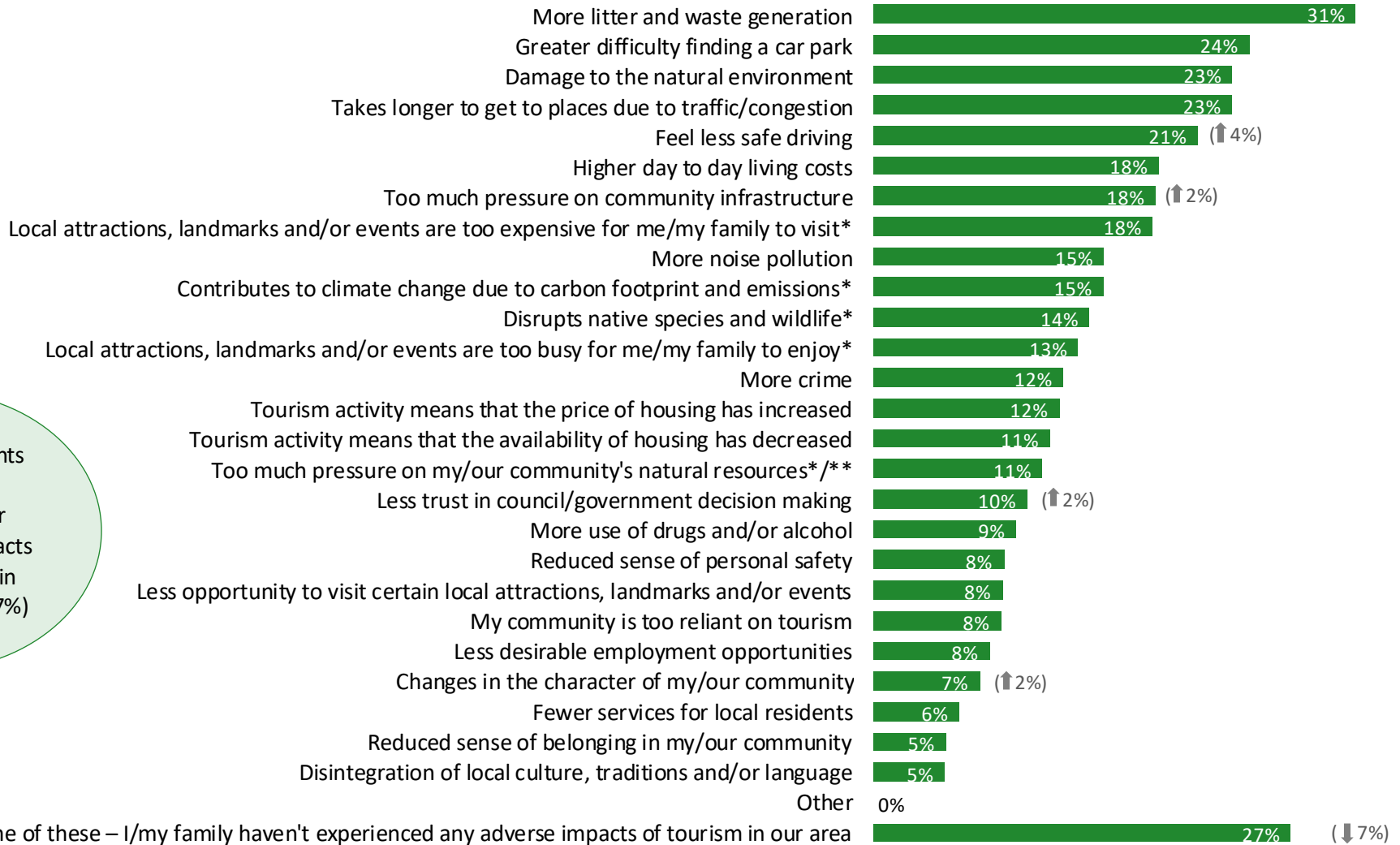
Base (YE Dec 2024): Total sample - New Zealand residents n=3,195

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

*Option added in Oct 23 so no comparison available

NEGATIVE IMPACTS OF 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?



73% of NZ residents report having experienced one or more adverse impacts of tourism activity in their local area (↑7%)

**e.g., through increased water and energy consumption

Base (YE Dec 2024): Total sample - New Zealand residents n=3,195

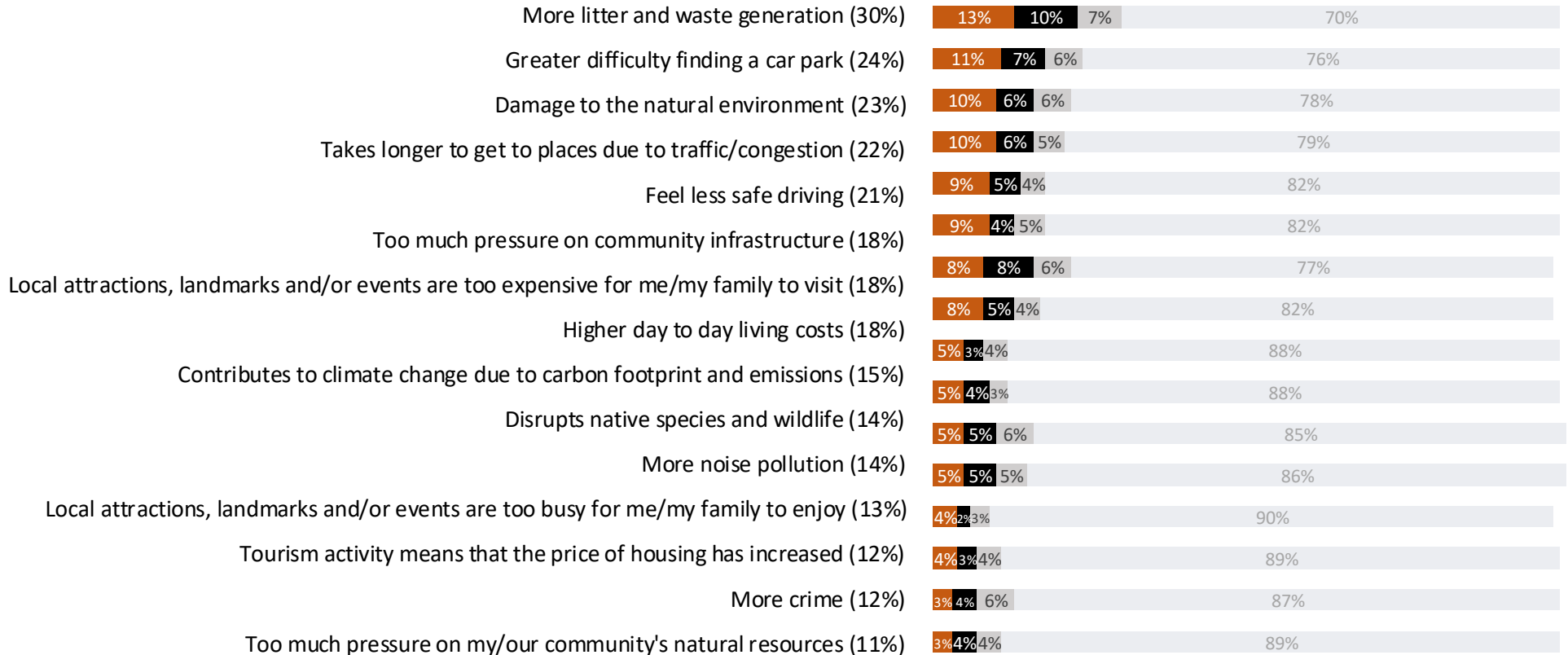
Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2023 at 95% confidence level 20

*Options added in Oct 23 so no comparison available

ACTION TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM

Thinking about the areas in which tourism has negatively impacted you/your family, would you say that:
not enough action is being taken/enough action is being taken/don't know/no adverse impact?*

Negative impact (Top 15 - ranked by prevalence, Jul - Dec 2024 only)



■ Not enough action taken ■ Enough action taken
■ Don't know ■ No adverse impact

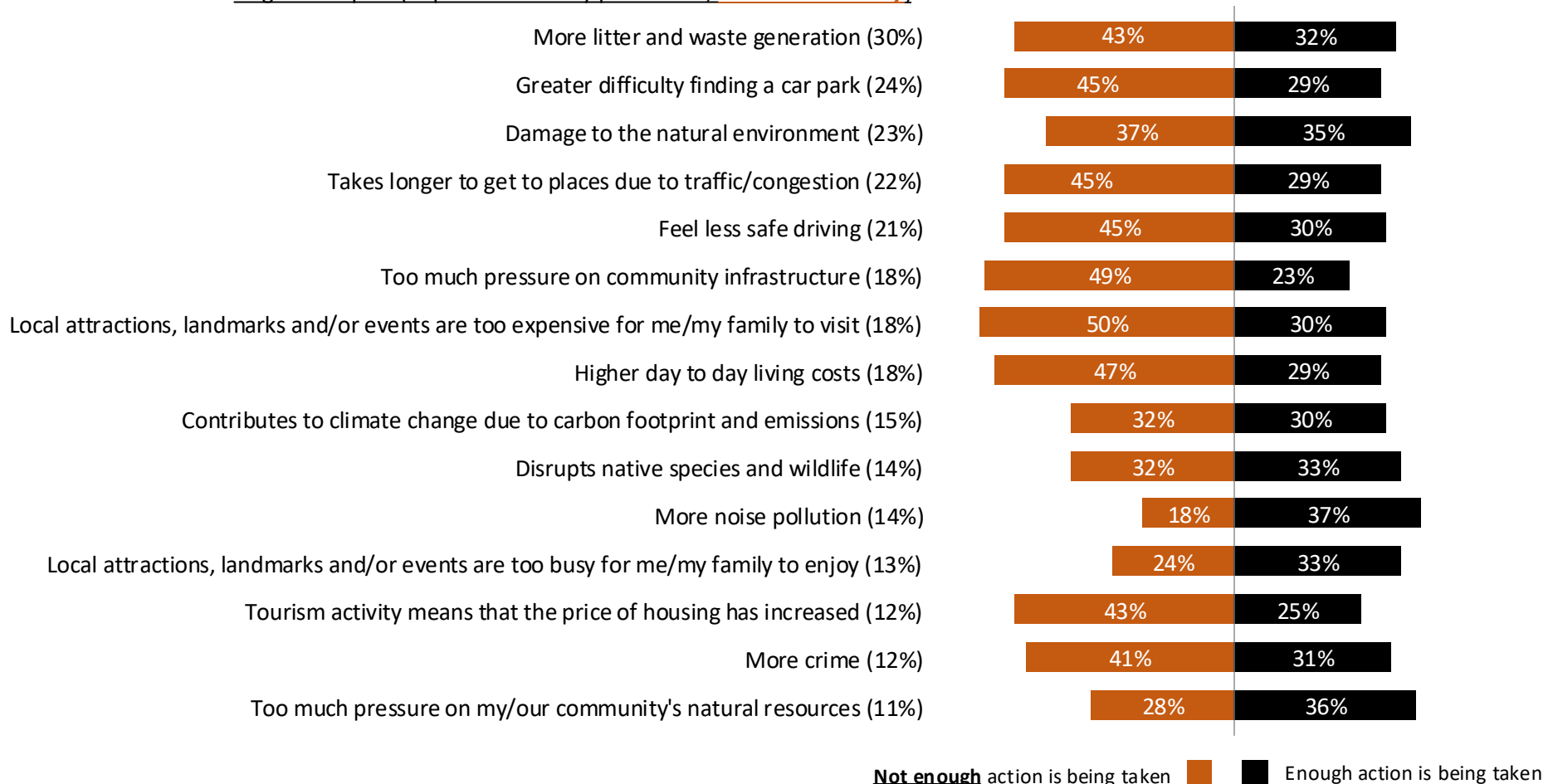
* Note question change from July 2024

Base (Jul 24 – Dec 24): Total sample – New Zealand residents n=1,594

ACTION TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM

Thinking about the areas in which tourism has negatively impacted you/your family, would you say that:
not enough action is being taken/enough action is being taken?*

Negative impact (Top 15 - ranked by prevalence, Jul - Dec 2024 only)



* Note question change from July 2024

Base (Jul 24 – Dec 24): Total sample – New Zealand residents n=1,594
'Don't know' and no impact responses excluded

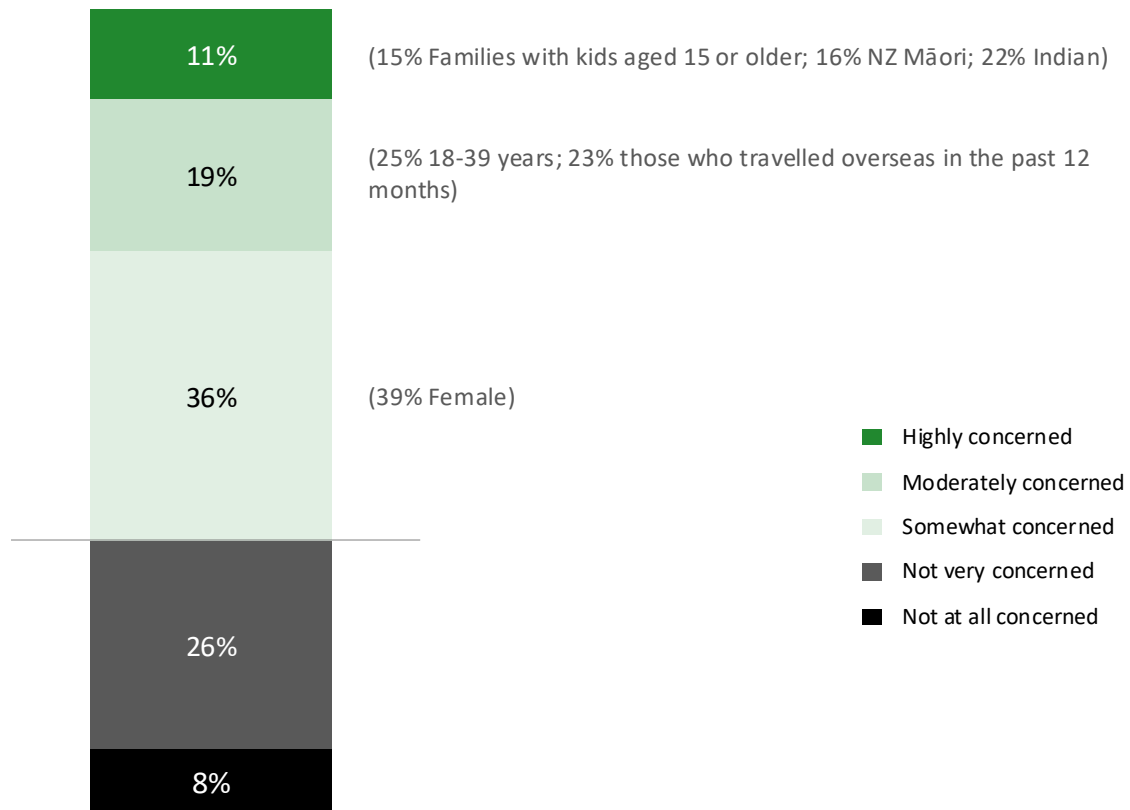
A scenic view of a beach framed by large trees, with a white circle containing text overlaid on the left side. The background shows a sandy beach, blue water, and a clear sky. Two people are visible walking on the beach in the distance. The text is centered within the white circle.

**ENVIRONMENTAL
IMPACTS OF
TOURISM**

CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

Two-thirds of NZ residents are concerned, to varying degrees, with the impact tourism could be having on New Zealand's natural environment.

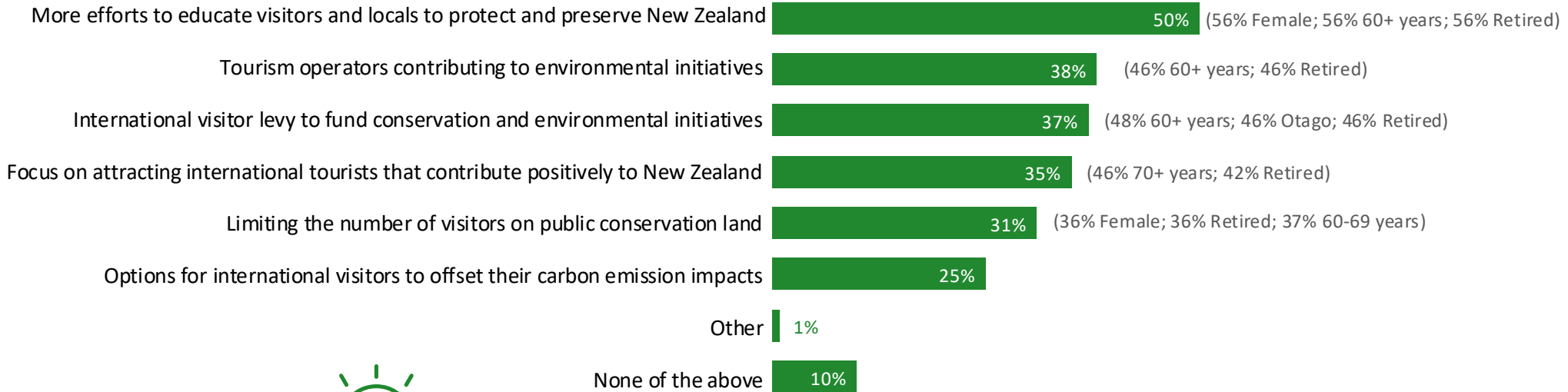
How concerned are you with any impact tourism could be having on New Zealand's natural environment?




MEASURES TO MITIGATE ENVIRONMENTAL IMPACTS

Half of New Zealanders surveyed would like to see a greater education effort in place to protect New Zealand's environment.

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



A scenic view of a beach framed by large trees, with a white circle containing text overlaid on the left side. The background shows a sandy beach, blue water, and a rocky outcrop in the distance. Two people are walking on the beach. The text is centered within the white circle.

**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)



Base (YE Dec 2024): Total sample - New Zealand residents n=3,195

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

*Option added in Oct 23 so no comparison available

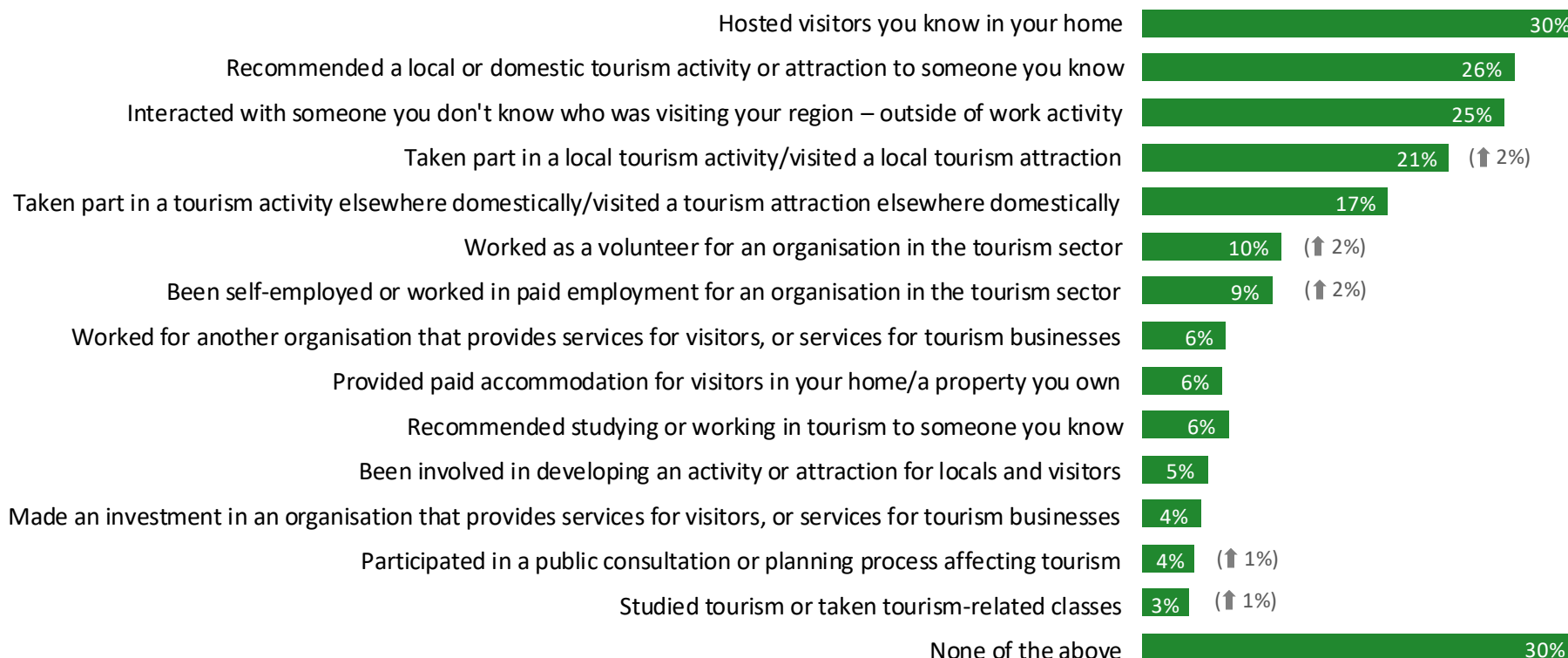
A scenic view of a beach framed by trees, with a white circle containing text overlaid on the left side. The background shows a sandy beach, blue water, and a rocky island in the distance. Two people are walking on the beach. The text is centered within the white circle.

RESIDENT
ENGAGEMENT
ACTIONS WITH
VISITORS

RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

70% of New Zealand residents have engaged with tourism/visitors in some way during the past two years.

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



A scenic view of a beach framed by trees, with a white circle containing the text 'SAMPLE PROFILE' overlaid on the left side. The background shows a sandy beach, blue water, and a rocky outcrop in the distance. Two people are walking on the beach. The entire image has a light green tint.

SAMPLE PROFILE

SAMPLE PROFILE

| Gender | |
|---|--------------|
| Male | 48% |
| Female | 52% |
| Gender diverse / Prefer not to say | Less than 1% |
| Age | |
| 18 – 29 years | 22% |
| 30 – 39 years | 17% |
| 40 – 49 years | 17% |
| 50 – 59 years | 17% |
| 60 – 69 years | 13% |
| 70+ years | 14% |
| Travel in Past 12 Months | |
| Travelled around New Zealand | 75% |
| Travelled to Australia | 22% |
| Travelled overseas (outside of Australasia) | 26% |
| Have not travelled | 15% |
| Base: Total sample | n=3,195 |

| Region | |
|------------------------|---------|
| Northland | 4% |
| Auckland | 32% |
| Waikato | 9% |
| Bay of Plenty | 7% |
| Gisborne | 1% |
| Hawke’s Bay | 4% |
| Taranaki | 2% |
| Manawatū-Whanganui | 5% |
| Wellington & Wairarapa | 10% |
| Tasman | 1% |
| Nelson | 1% |
| Marlborough | 1% |
| West Coast | 1% |
| Canterbury | 12% |
| Otago | 8% |
| Southland | 2% |
| Base: Total sample | n=3,195 |

| Ethnicity | |
|----------------------------------|---------|
| New Zealand European | 68% |
| Other European | 7% |
| New Zealand Māori | 11% |
| Cook Island Māori | 1% |
| Indian | 5% |
| Chinese | 3% |
| Pacific Islander | 3% |
| Other | 13% |
| Household Composition | |
| My husband, wife or partner | 56% |
| My mother and/or father | 7% |
| My child/children aged under 5 | 11% |
| My child/children aged 5 - 14 | 17% |
| My child/children aged 15+ | 13% |
| 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=3,195 |



angus
& ASSOCIATES