



VIEWS ON TOURISM<sup>©</sup> PROGRAMME

# VIEWS ON TOURISM: NEW ZEALAND

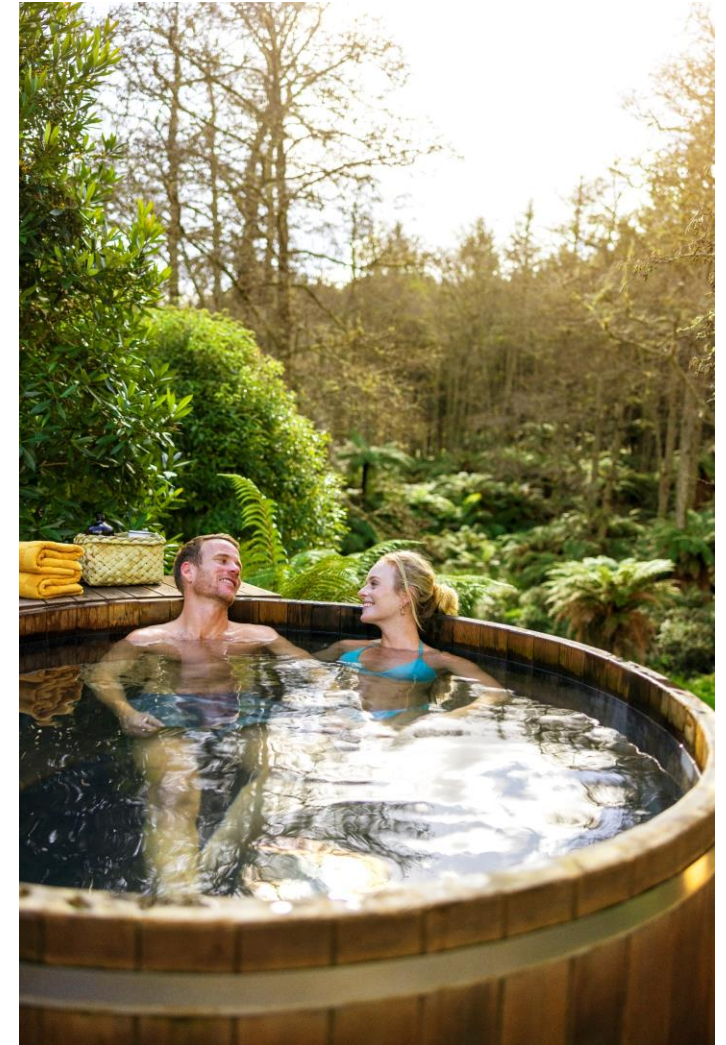
YEAR ENDING JUNE 2024

# INTRODUCTION

This report captures findings from questions included in Views on Tourism® research conducted from **July 2023 to June 2024**<sup>1</sup>. 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). **Information from the expanded survey is available in this report on the pages clearly noted as 'Oct 23 – Jun 24' and visually distinguished by the use of an orange colour palette.**



# METHODOLOGY

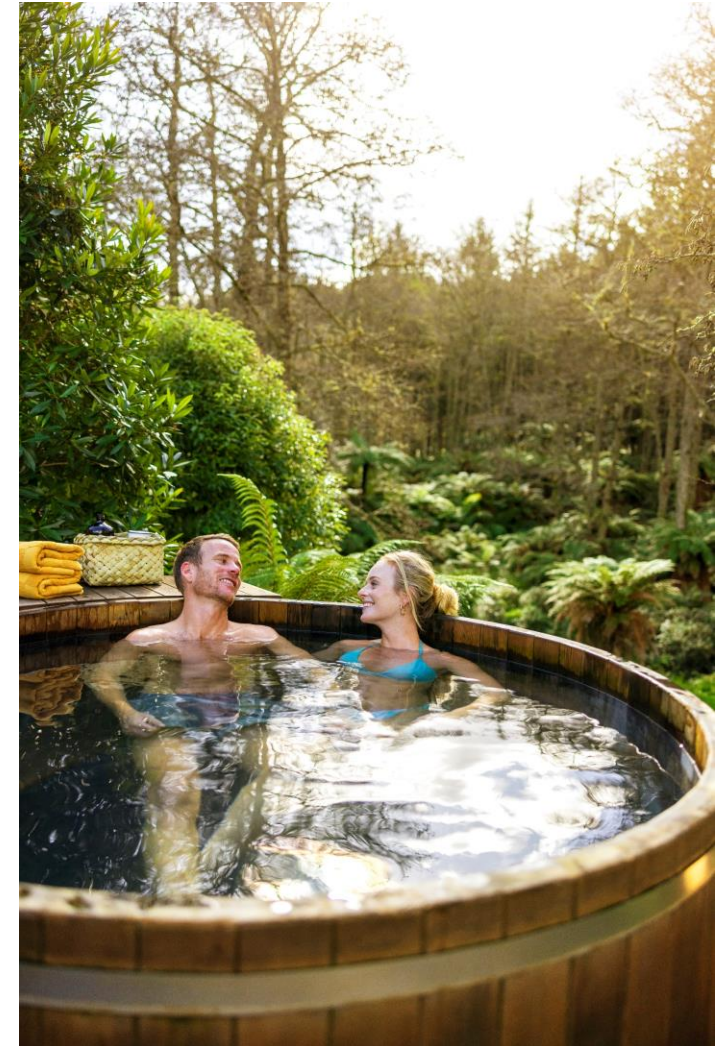
The research is undertaken with a representative (by age, gender and region) sample of at least n=250 New Zealand residents each month. The sample is collected continuously through the year and accumulates to at least n=3,000 on an annual basis.

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



While the international TAR score remains stable compared with the previous 12-month period at 49 vs 50 in YE Jun 2023, the domestic TAR score has seen a decline – currently at 59, down from 64.

The level of agreement remains high among New Zealand residents that tourism, both international and domestic, is good for New Zealand and for their region. Compared with the previous year, the sentiment is more positive towards international tourism with a higher proportion of those who agree that international tourism is good for New Zealand and for their region.

While the majority embraces tourism positively, people do feel a keener sense of the pressure from the visitors in the country, and especially in their region. Compared with previous year, there's a significant increase in the proportion of those who agree, and a significant decrease in the proportion of those who disagree, that domestic visitors put too much pressure on New Zealand and on their region. This might explain the decrease in the domestic TAR score.

81% of New Zealand residents personally benefited from tourism activity in their local area in the year ending June 2024. 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%).

Seven in ten New Zealand residents say they have been negatively impacted by tourism activity in their local area in some way. This proportion has increased compared with the previous year (70%, up from 65%). The top concerns remain consistent – more litter and waste generation, greater difficulty finding a car park, and that it takes longer to get to places due to traffic/congestion.

## KEY INSIGHTS (CONT.)



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). Note, the wording of this question is being simplified from 1 July 2024.

Consistent with previous results, New Zealand residents' concerns are mainly related to the infrastructure and living costs. They believe that key actions that could reduce the negative impacts of tourism include enhancing community infrastructure, managing and lowering living costs, improving safety, and mitigating the negative impacts of tourism on natural resources.

Looking to the future, improving community infrastructure remains the top one priority though the proportion of those who believe this should be the industry's focus has decreased compared with the previous year – 27% down from 29%. Improving safety for the community as well as for visitors prove to be concern for some specific groups, including the 18-29 age group and Auckland residents.

Almost seven in ten New Zealand residents have engaged with tourism/visitors in some way during the past two years. This proportion has increased compared with the previous year (69%, up from 66%).

A deep dive into the drivers for the 18-29 age group's lower TAR score reveals that compared with other age groups, this group has the highest level of engagement with tourism/visitors and has felt the most benefits, but at the same time experienced the most impacts. This leads to their high level of agreement that visitors put too much pressure on New Zealand and on their region, resulting in a lower TAR score for both domestic and international tourism.

## KEY INSIGHTS (CONT.)



**Results for the following metrics based on nine months data from Oct 23 to Jun 24 are very consistent with those based on the six months data from Oct 23 to Mar 24.**

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

In terms of the impacts of tourism based on the four capitals (society, culture, economy and nature), New Zealand residents continue to think that tourism has the most positive impact on the economy and 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 July 2023 and June 2024 using Angus & Associates' Views on Tourism© programme. The sample includes n=3,049 New Zealand residents aged 18+ years.

## TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism

International TAR:








Domestic TAR:








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






81% 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

70% 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
-  Encouraging visitors to travel outside the peak season
-  Attracting more domestic visitors

The background of the slide is a photograph of a mountain valley. In the center, a white helicopter with red and black accents is flying over a valley. The mountains are rugged and have patches of snow. The sky is a pale, hazy blue. A large white circle is overlaid on the left side of the image, containing the text.

OVERALL SENTIMENT  
TOWARDS TOURISM  
ACTIVITY



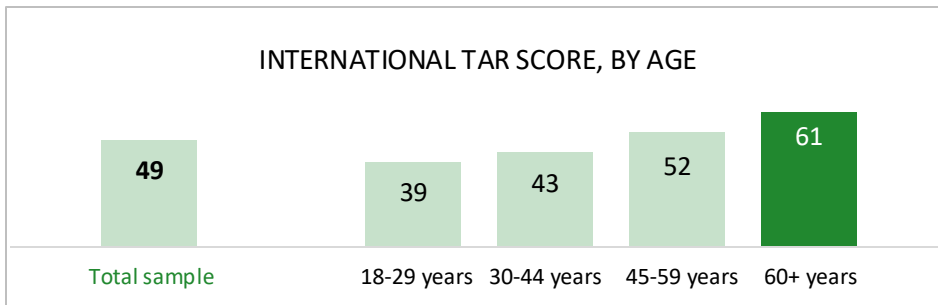
# INTERNATIONAL TOURISM

For the period YE Jun 2024, the level of agreement remains high among New Zealand residents in that 'international tourism is good for New Zealand' and that 'international tourism is good for their region'. These proportions are higher than they were in the previous 12 months.

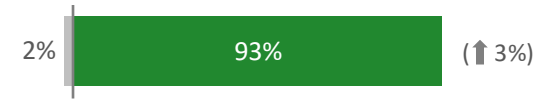
While the proportion of those who believe that international visitors put too much pressure on New Zealand stays the same as in previous year ending Jun 2023 (34%), there is a significant increase in the proportion of those who believe that international visitors put too much pressure on their region – 29% up from 25%.

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 49) - 1 point lower than previous quarter YE Mar 24.

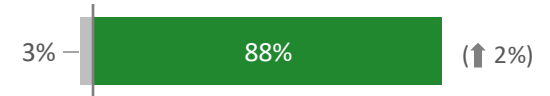
By age, younger New Zealand residents view international tourism less favourably than older age groups. The international TAR score is also lower than it is for the total sample amongst Chinese New Zealanders (at 35), NZ Māori (at 40) and Indian New Zealanders (at 40), and those who have not travelled domestically or internationally in the past 12 months (at 46).



International tourism is good for New Zealand



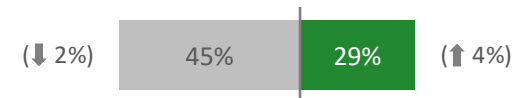
International tourism is good for my region



International visitors put too much pressure on New Zealand



International visitors put too much pressure on my region



Disagree\*    Agree\*

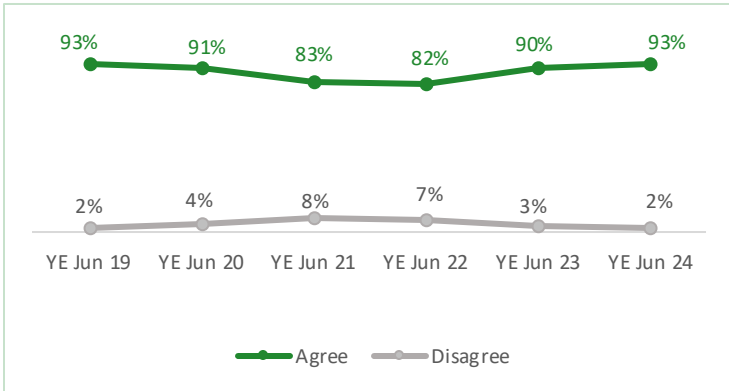
Base: Total sample - New Zealand residents n=3,049

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

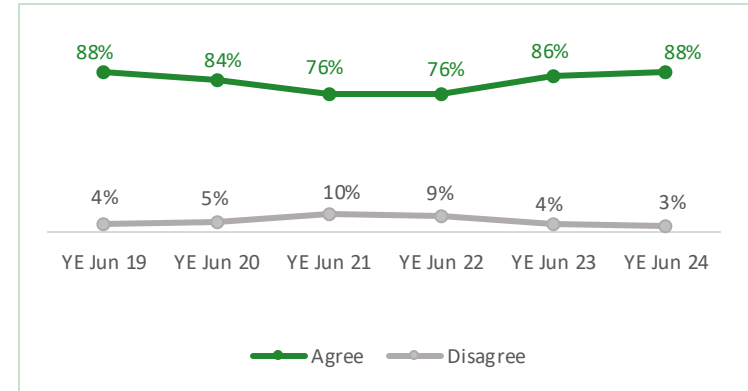
\*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

# INTERNATIONAL TOURISM (CONT.)

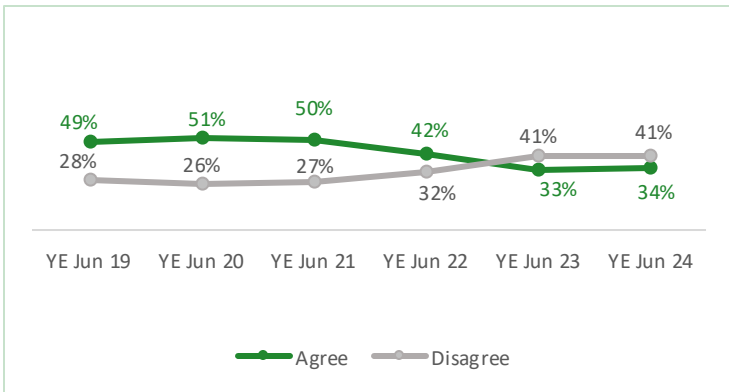
International tourism is good for New Zealand



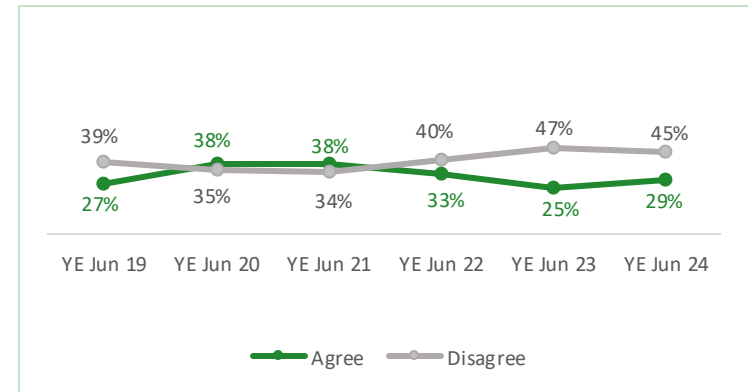
International tourism is good for my region



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 Jun 19 (n=2,487); YE Jun 20 (n=2,863); YE Jun 21 (n=3,066); YE Jun 22 (n=3,111); YE Jun 23 (n=3,259); YE Jun 24 (n=3,049)

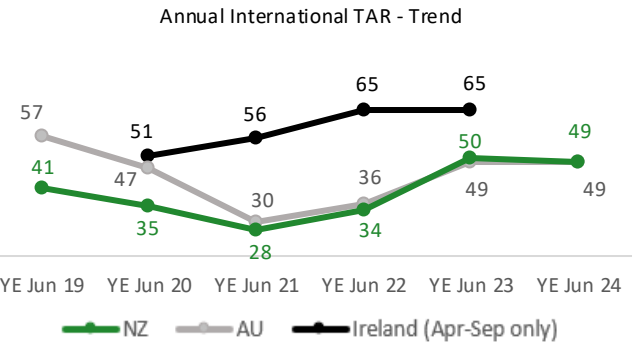
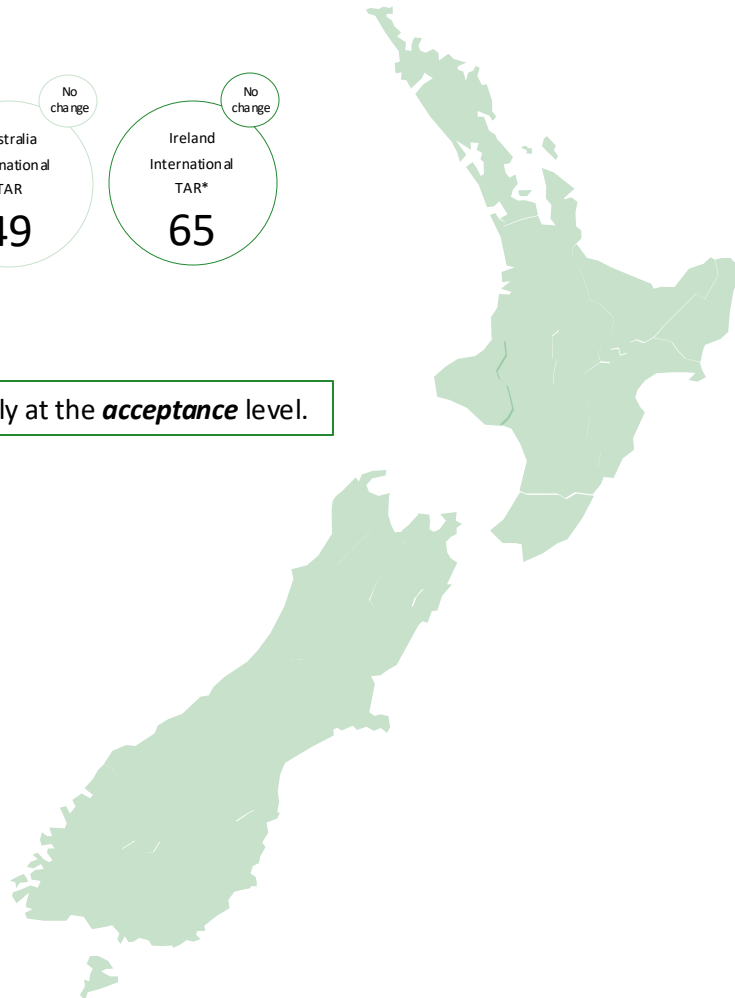
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# INTERNATIONAL TOURISM (CONT.)



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

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



Region	International TAR	N=
Northland	49	117
Auckland	49	1,000
Waikato	50	292
Bay of Plenty/Gisborne/Hawke's Bay	50	335
Taranaki/Manawatū-Wanganui	52	234
Wellington	53	334
Tasman/Nelson/Marlborough/West Coast	46	119
Canterbury	48	396
Otago/Southland	45	222

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 Jun 2024): NZ residents n =3,049; AU residents n=2,457

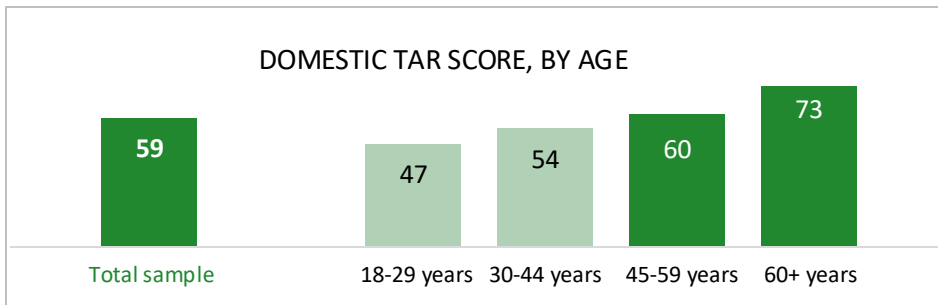
\*Ireland TAR is based on data collected during Apr-Sep 23 only, from n=2,613 Ireland residents

# DOMESTIC TOURISM

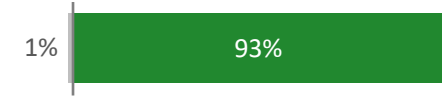
While the level of agreement remains high among New Zealand residents that domestic tourism is good for New Zealand as well as for their region, there is significant change in sentiment towards the pressure that domestic visitors have on New Zealand and on their region. Almost one in four New Zealand residents (24%) believe that domestic tourism is putting too much pressure on New Zealand and a similar proportion (23%) believe that domestic tourism is putting too much pressure on their region. These proportions are a 4% rise compared with those in the previous year ending June 2023.

New Zealand’s domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, has fallen to 59, down from 64 in the previous 12-month period. However, this remains more favourable 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 50), and Chinese and Indian New Zealanders (at 42 and 47 respectively).



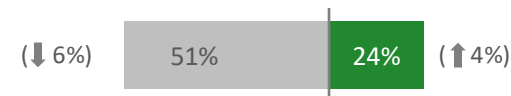
Domestic tourism is good for New Zealand



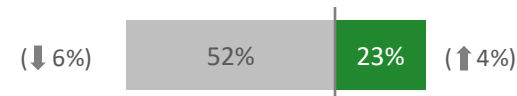
Domestic tourism is good for my region



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=3,049

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

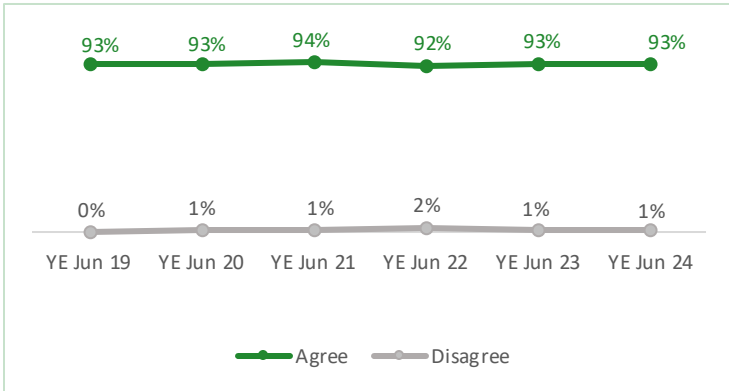
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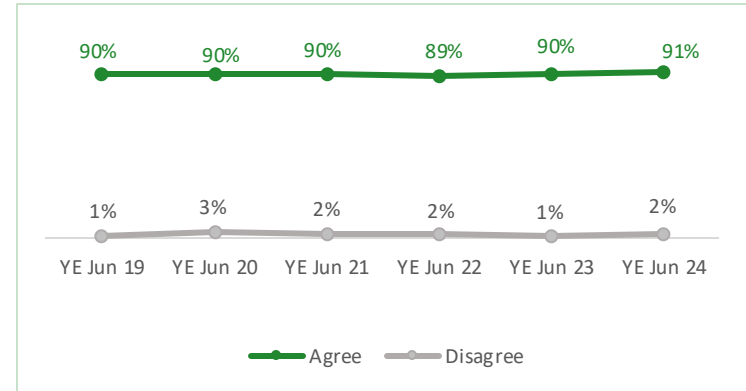


# DOMESTIC TOURISM (CONT.)

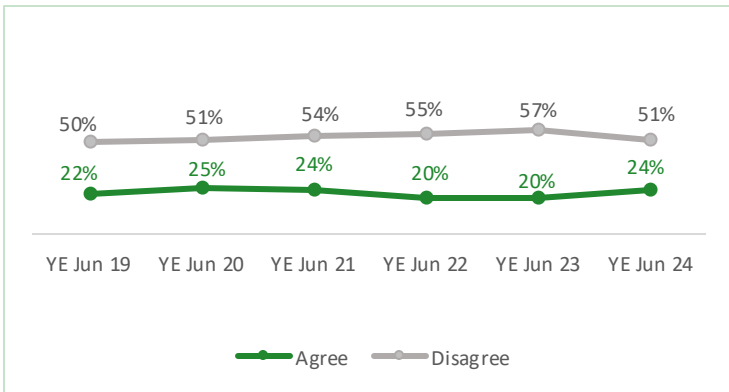
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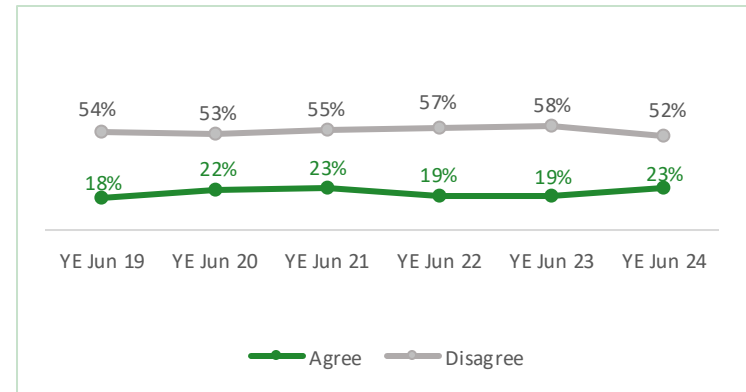
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



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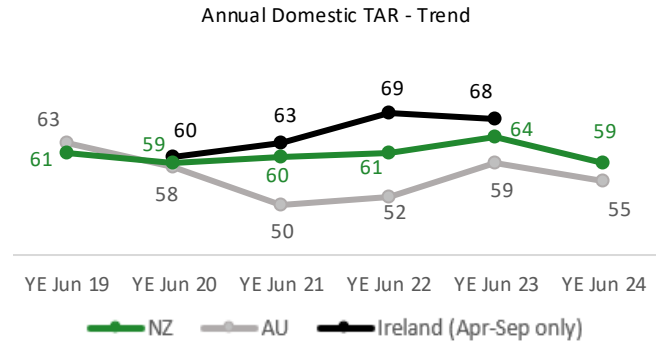
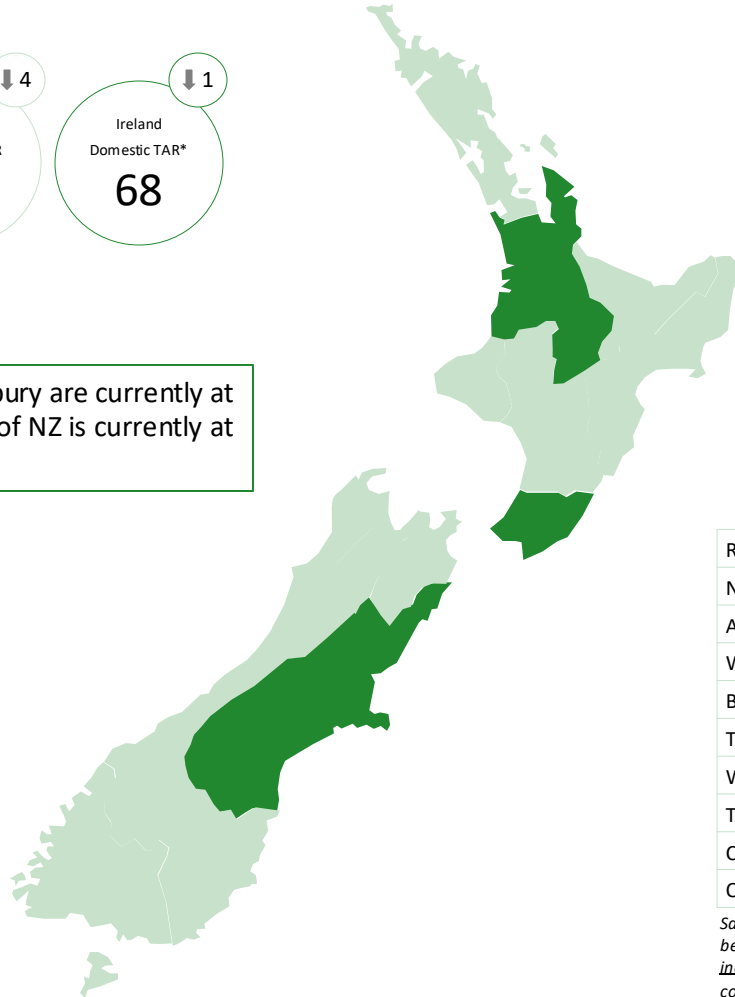
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# DOMESTIC TOURISM (CONT.)



Waikato, 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	56	117
Auckland	57	1,000
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Bay of Plenty/Gisborne/Hawke's Bay	57	335
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Base (YE Jun 2024): NZ residents n =3,049; AU residents n=2,457

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# 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, more than one third (35%) believe that visitors put too much pressure on New Zealand, and more than a quarter (28%) 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 50).

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 28, 38 and 45.

Tourism is good for New Zealand



Tourism is good for my region



Visitors are putting too much pressure on New Zealand

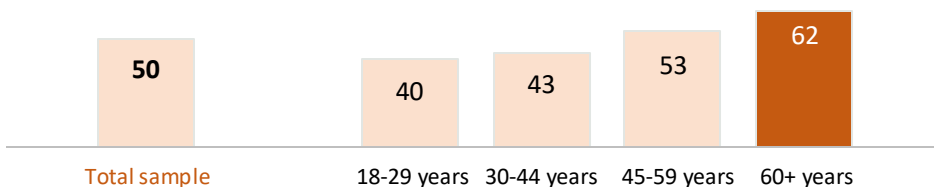


Visitors are putting too much pressure on my region




Disagree\*    Agree\*

TOURISM TAR SCORE, BY AGE



Base (Oct 23 – Jun 24): Total sample – New Zealand residents n=2,254

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

The background of the slide is a photograph of a mountain valley. In the center, a white helicopter with red and black accents is flying over a valley floor. The surrounding mountains are rugged and partially covered in snow. The entire image has a semi-transparent green overlay. A large white circle is positioned on the left side of the slide, containing the title text.

**IMPACTS OF  
TOURISM BASED ON  
THE FOUR CAPITALS**

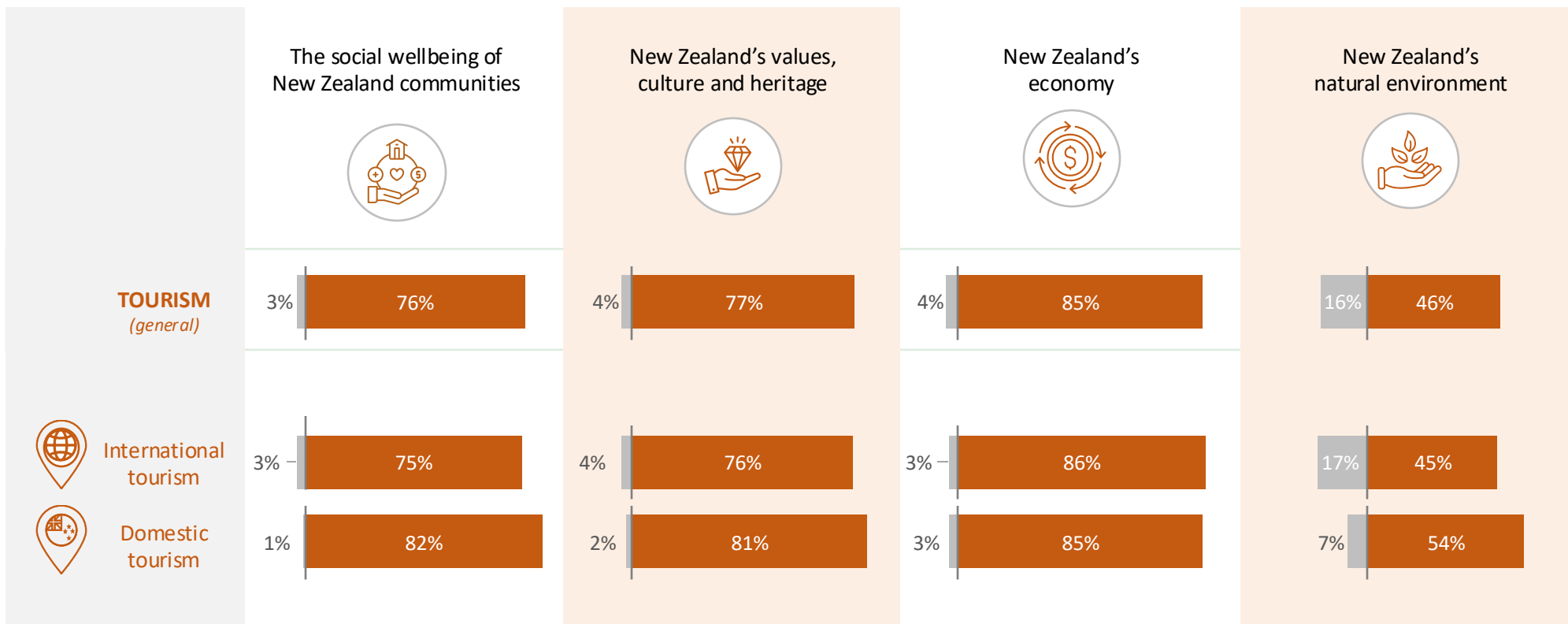


VIEWS ON TOURISM: NEW ZEALAND (YE JUN 2024)

# 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

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



Negative\* Positive\*

Base (Oct 23 – Jun 24): Total sample – New Zealand residents n=2,254  
 \*Negative = Very negative + Negative; Positive = Very positive + Positive;  
 'Neither positive nor negative' responses excluded

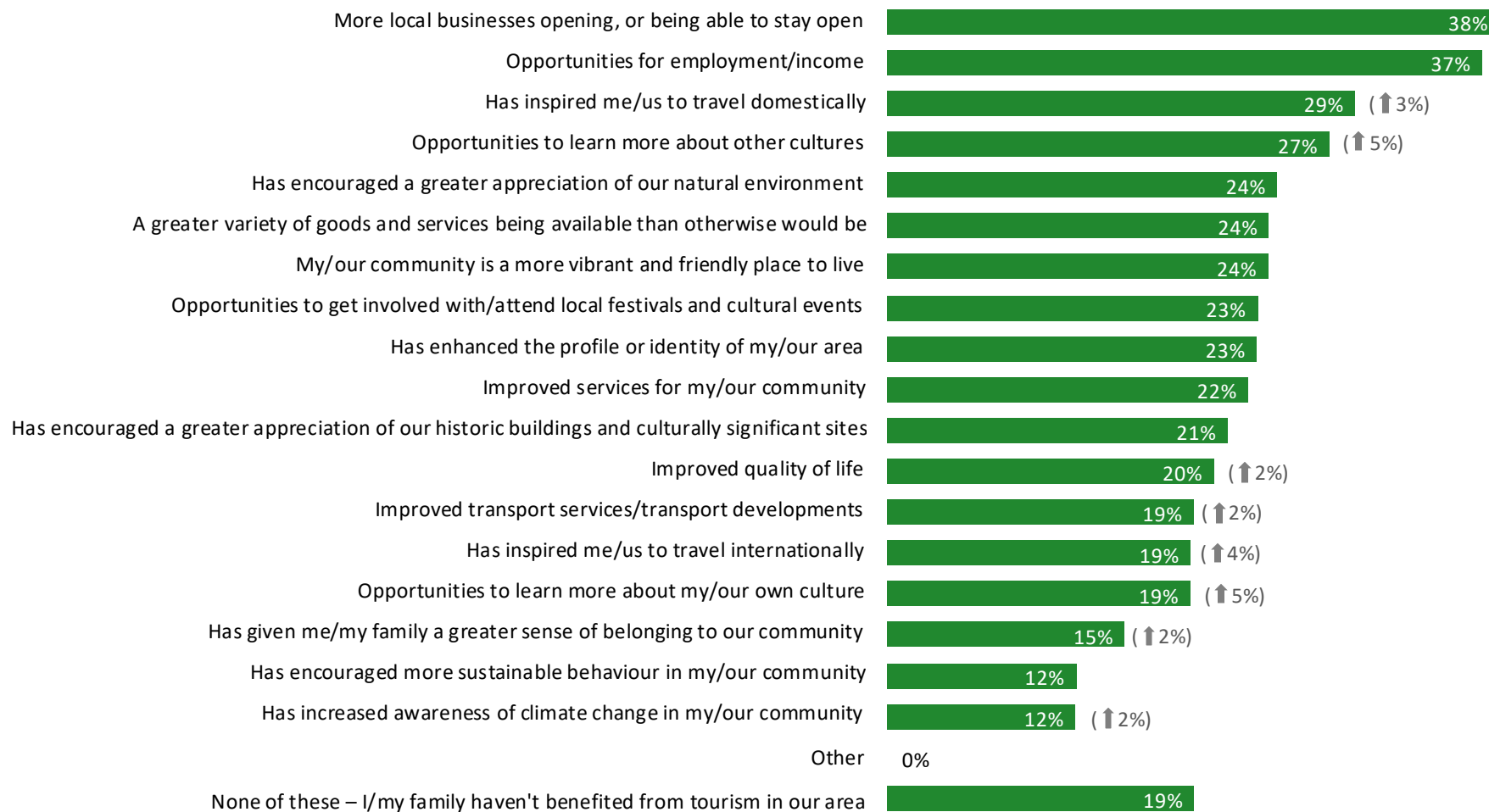
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**FELT BENEFITS &  
IMPACTS OF  
TOURISM ACTIVITY**

# BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

**81%** of New Zealand residents say they personally benefit from tourism activity in their local area in some way.

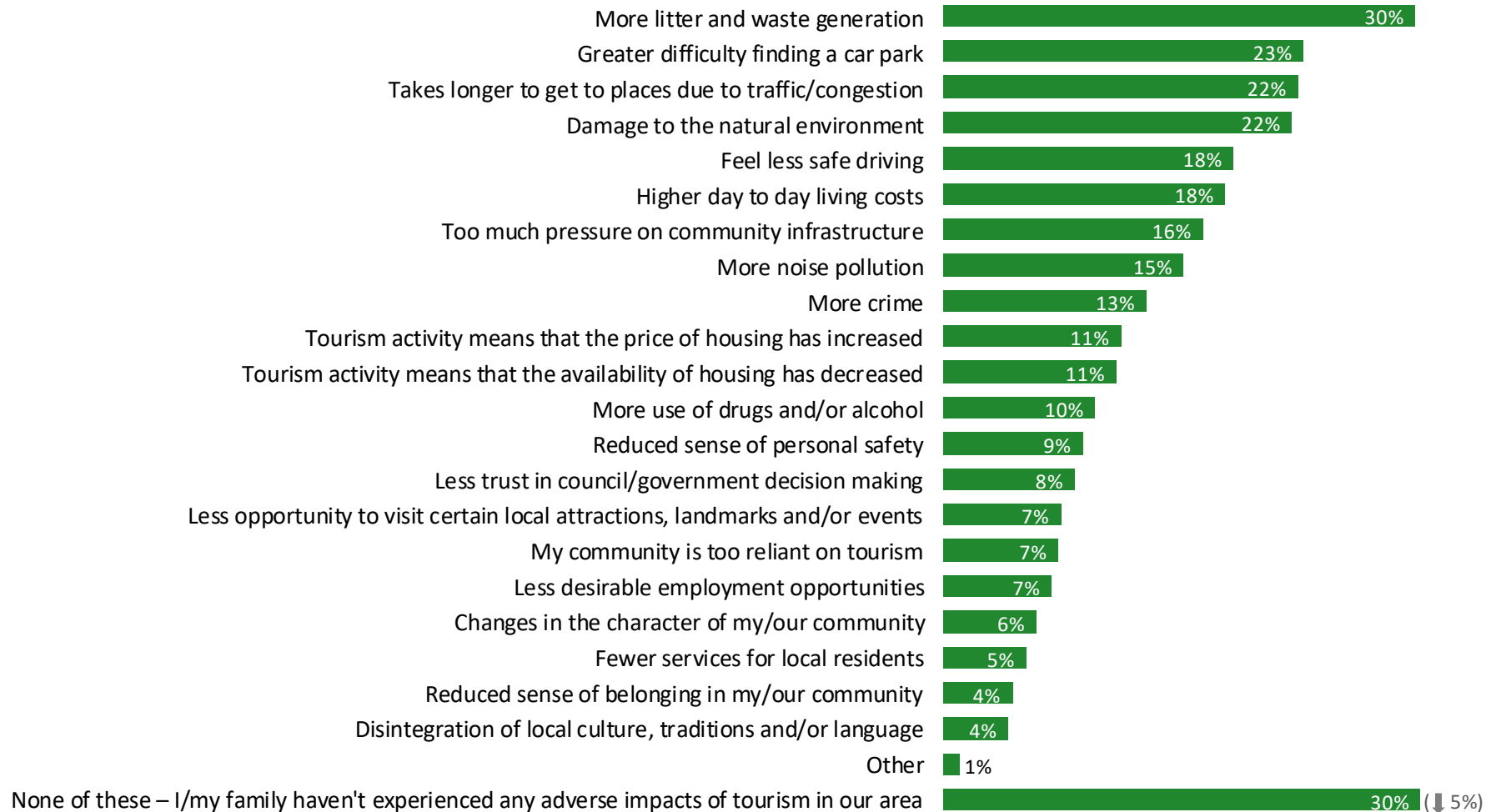
In which of the following ways, if any, would you say you/your family benefit from tourism activity in your local area?



# NEGATIVE IMPACTS OF TOURISM ACTIVITY IN LOCAL AREA

**70%** of New Zealand residents say they have experienced adverse impacts of tourism activity in their local area in some way. There has been no statistically significant movement in the individual concern levels.

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

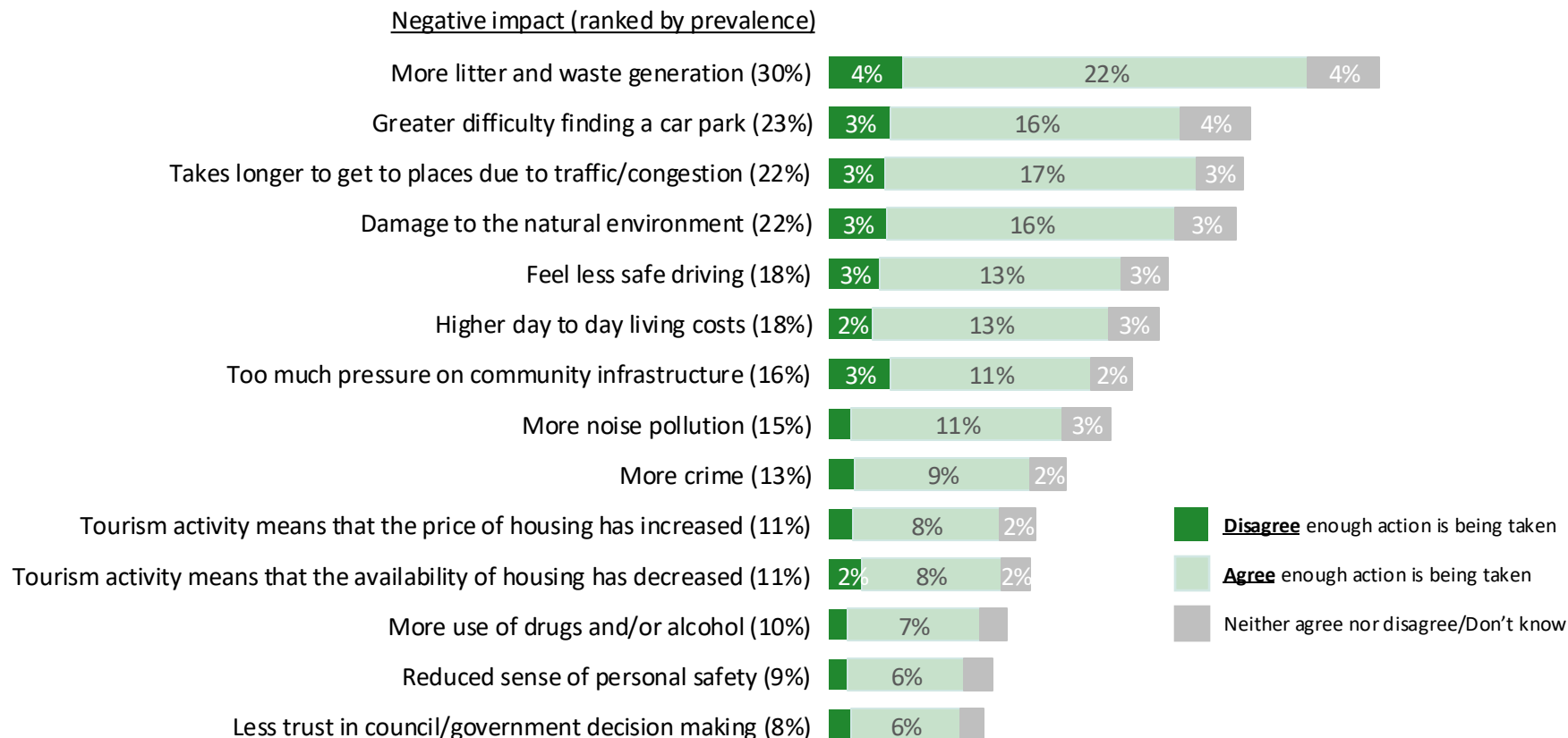




# ACTION TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM

**71%** of New Zealand residents agree that sufficient action has been taken.

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





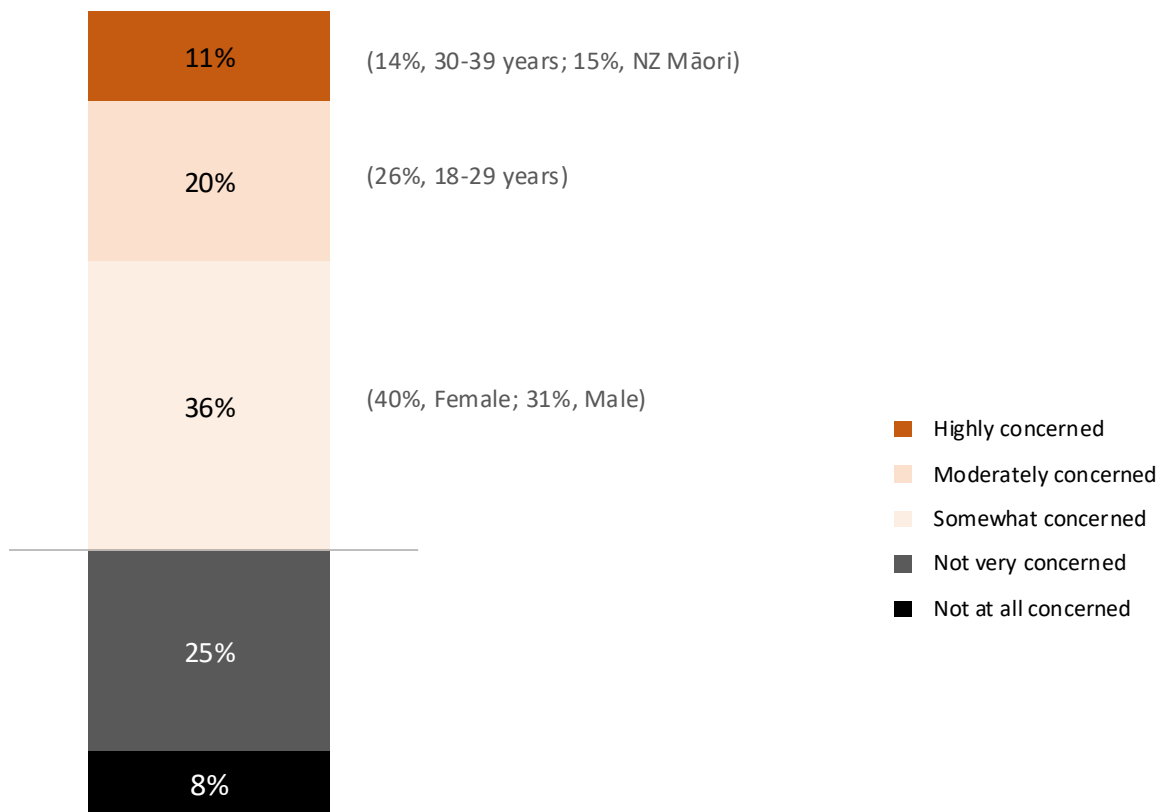
ENVIRONMENTAL  
IMPACTS OF  
TOURISM

VIEWS ON TOURISM: NEW ZEALAND (YE JUN 2024)

# CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

**67%** of NZ residents are concerned, to different degrees, with the impact tourism could be having on NZ's natural environment.

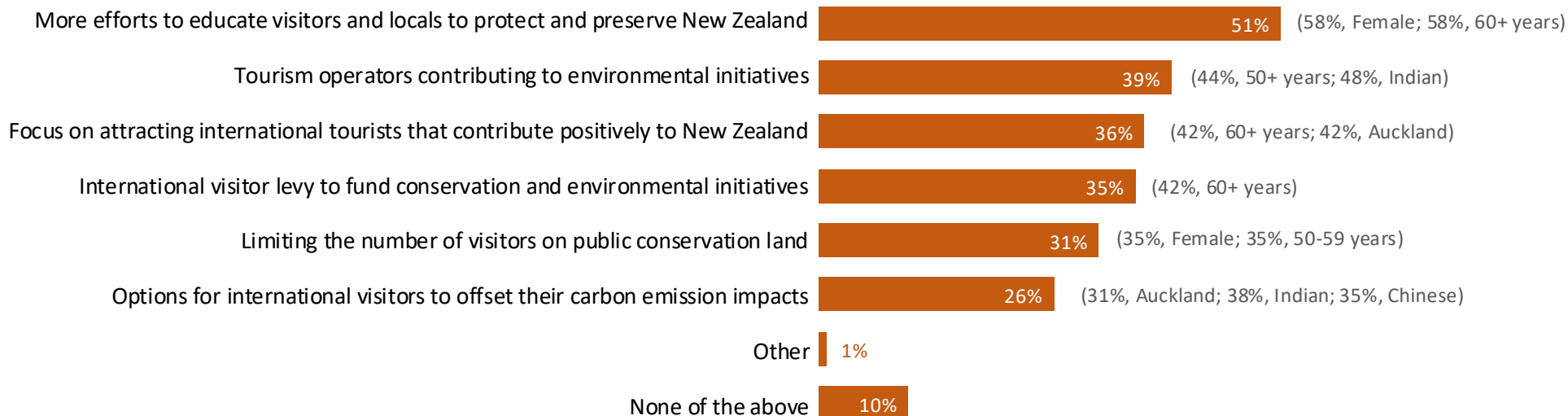
How concerned are you with any impact tourism could be having on New Zealand's natural environment?




# MEASURES TO MITIGATE ENVIRONMENTAL IMPACTS

A greater education effort on the need to protect New Zealand’s environment is the top-ranked measure.

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



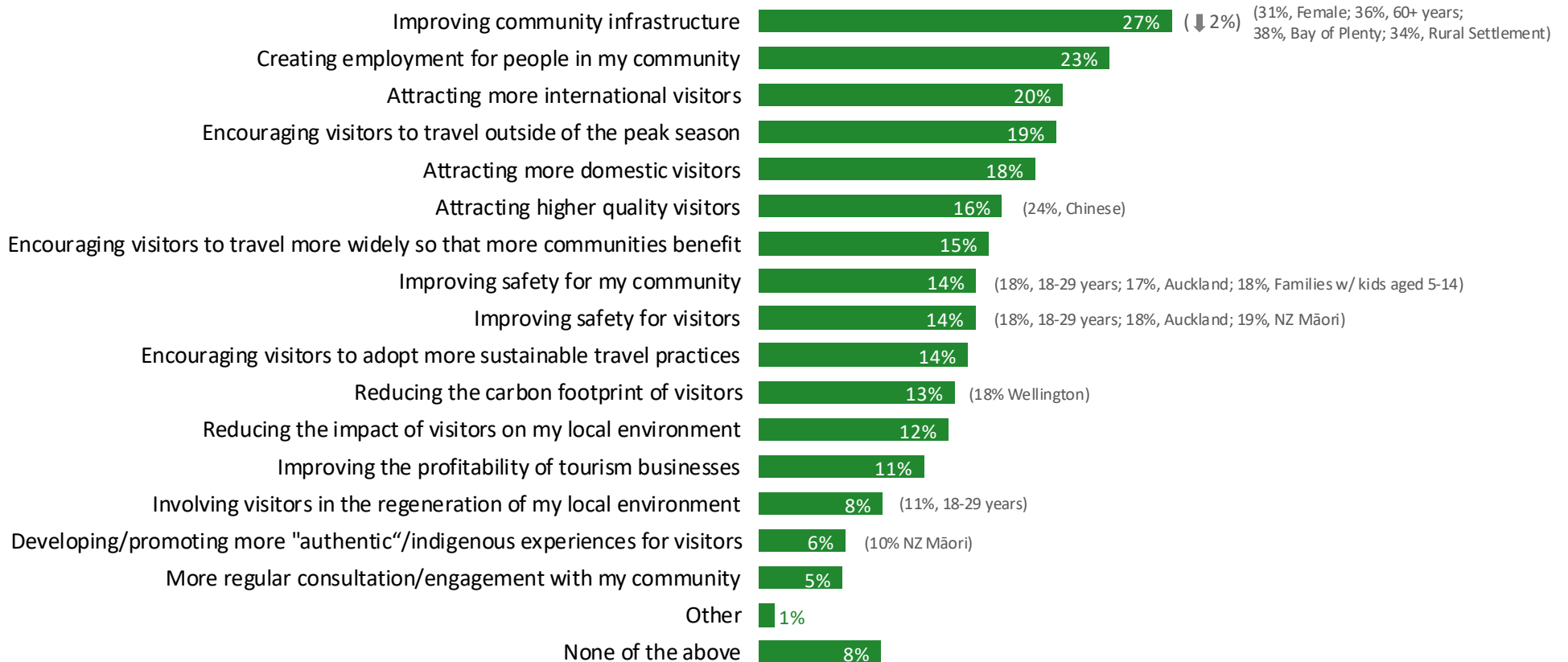


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**FUTURE FOCUS  
FOR LOCAL  
TOURISM INDUSTRY**

# 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)



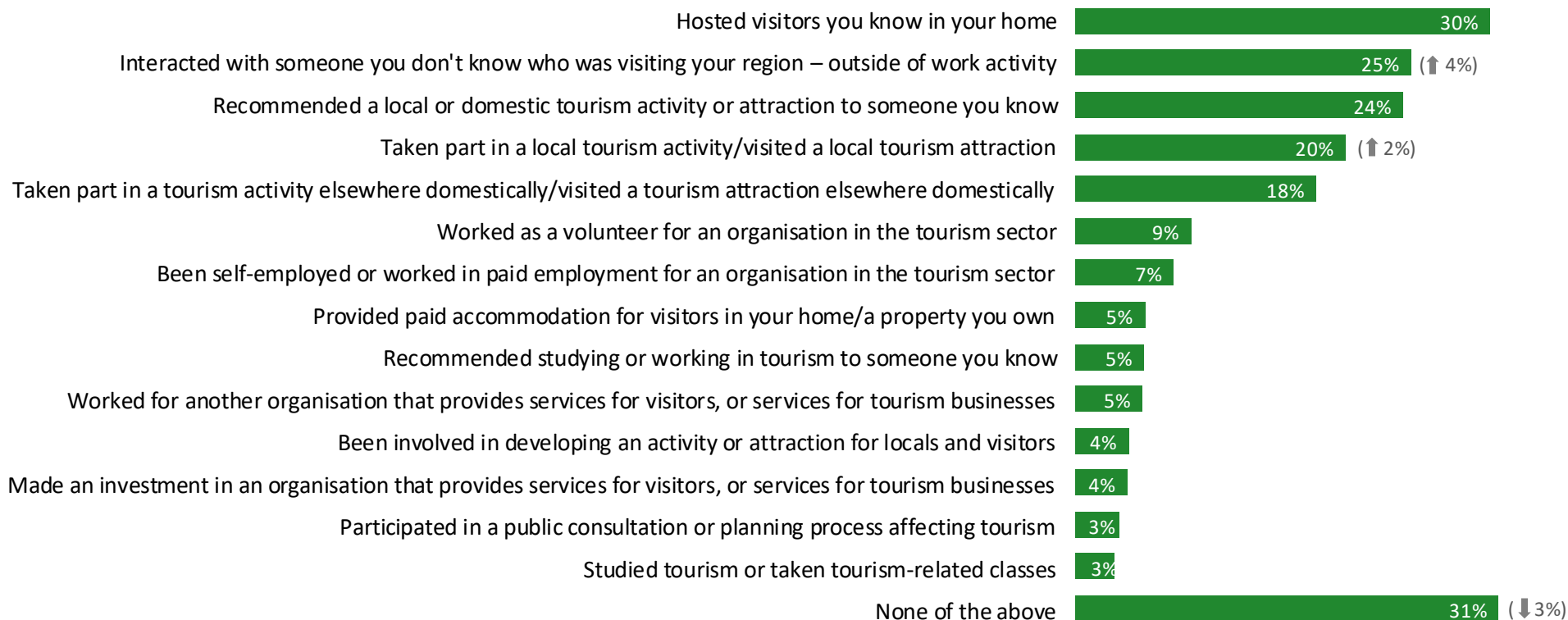
The background of the slide is a photograph of a mountain valley with a helicopter in flight. The image is overlaid with a semi-transparent green filter. A large white circle is positioned on the left side of the slide, containing the text.

RESIDENT  
ENGAGEMENT  
ACTIONS WITH  
VISITORS

# RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

69% 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)?





DEEP DIVE





# SNAPSHOT ON 18-29 GROUP

Correlation analysis shows that -

- The more engagement with tourism, the more benefits felt as well as the more adverse impacts felt
- The more benefits felt from tourism, the higher level of agreement that ‘tourism is good for NZ/region’
- The more impacts felt from tourism, the higher level of agreement that ‘visitors put too much pressure on NZ/region’

This is the case for young New Zealanders – they have the highest level of engagement, thus the most benefits felt, and at the same time, the most impacts experienced.



## MOST LIKELY TO HAVE

*Note: (% 18-29 group vs % Total sample)*

- Worked as a volunteer for an organisation in the tourism sector (13% vs 9%)
- Been self-employed or worked in paid employment for an organisation in the tourism sector (12% vs 7%)
- Recommended studying or working in tourism to someone you know (10% vs 5%)
- Worked for another organisation that provides services for visitors, or services for tourism businesses (8% vs 5%)
- Studied tourism or taken tourism-related classes (8% vs 3%)
- Been involved in developing an activity or attraction for locals and visitors (7% vs 4%)
- Provided paid accommodation for visitors in your home/a property you own (6% vs 5%)
- Participated in a public consultation or planning process affecting tourism (5% vs 3%)



## LEAST LIKELY TO HAVE NOT ENGAGED AT ALL IN TOURISM (21% vs 31%)



## MOST LIKELY TO FEEL BENEFIT FROM

- Inspiration to travel domestically (35% vs 29%)
- Improved quality of life (27% vs 20%)
- Opportunities to learn more about their own culture (23% vs 19%)
- More sustainable behaviour encouraged in community (16% vs 12%)



## LEAST LIKELY TO HAVE NOT BENEFITTED AT ALL FROM TOURISM (13% vs 19%)



## MOST LIKELY TO FEEL IMPACT FROM

- Higher day to day living cost (25% vs 18%)
- Increased price of housing due to tourism activity (14% vs 11%)
- More use of drugs and/or alcohol (13% vs 10%)
- Less opportunity to visit certain local attractions, landmarks and/or events (12% vs 7%)
- Reduced sense of personal safety (12% vs 9%)
- Fewer services for local residents (9% vs 5%)
- Change in character of their community (8% vs 6%)
- Reduced sense of belonging in my/our community (7% vs 4%)
- Disintegration of local culture, traditions and/or language (7% vs 4%)



## LEAST LIKELY TO HAVE NOT EXPERIENCED ANY ADVERSE IMPACTS AT ALL (17% vs 30%)

An aerial photograph of a mountain valley with a helicopter in the center. The image is overlaid with a semi-transparent green filter and a large white circle on the left side. The text 'SAMPLE PROFILE' is centered within the white circle.

## SAMPLE PROFILE

## SAMPLE PROFILE

Gender	
Male	49%
Female	51%
Gender diverse / Prefer not to say	0%
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	72%
Travelled to Australia	20%
Travelled overseas (outside of Australasia)	23%
Have not travelled	18%
Base: Total sample	n=3,049

Region	
Northland	4%
Auckland	33%
Waikato	10%
Bay of Plenty	6%
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=3,049

Ethnicity	
New Zealand European	68%
Other European	6%
New Zealand Māori	11%
Cook Island Māori	1%
Indian	5%
Chinese	4%
Pacific Islander	3%
Other	13%
Household Composition	
My husband, wife or partner	55%
My mother and/or father	8%
My child/children aged under 5	12%
My child/children aged 5 - 14	17%
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	2%
Base: Total sample	n=3,049



angus  
& ASSOCIATES