VIEWS ON TOURISM© PROGRAMME

VIEWS ON TOURISM: NEW ZEALAND

YEAR ENDING SEPTEMBER 2024

angus & ASSOCIATES

INTRODUCTION

This report captures findings from questions included in Views on Tourism© research conducted from **October 2023 to September 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 now available in this report based on a full-year dataset.

[1] Tourism New Zealand uses Angus & Associates' Views on Tourism© research methodology

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

Both the international and domestic Tourism Approval Ratings (TAR) have fallen compared with YE Sep 2023: currently at 48, down from 51; and 58, down from 63, respectively. Otago and Southland have dropped into the 'limited acceptance' of tourism category. Every other region remains in the 'acceptance' category.

The level of agreement remains high among New Zealand residents that tourism - overall, international and domestic - is good for New Zealand and for their region. And positive sentiment towards international tourism has slightly increased since last year.

However, while the vast majority view tourism positively, people do feel a keener sense of the pressure from visitors in the country, and especially in their region. Compared with the previous year, there is 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.

Tourism benefits

82% of New Zealand residents personally benefited from tourism activity in their local area in the year ending September 2024, an increase of 2% compared with same period last year. 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%). There is a significant increase in the proportion of those who felt more keenly about various benefits compared with YE Sep 23, especially opportunities to learn more about their own culture (+5%), inspiration to travel domestically (+4%) and improving quality of life (+4%).

Seven in ten New Zealand residents have engaged with tourism/visitors in some way during the past two years, which is an increase on last year (70%, up from 64%).

KEY INSIGHTS (CONT.)

Tourism impacts

Seven in ten New Zealand residents say they have been negatively impacted by tourism activity in their local area in some way. This is 7% higher compared with 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.

When asked to suggest ways to reduce tourism's negative impacts, New Zealand residents mention improving infrastructure, managing and lowering costs, enhancing safety, and protecting the environment.

Future focus - Deep dive

When looking to the future, improving community infrastructure and creating more employment have been the top two priorities for New Zealand residents in every one of the past five years, including the current reporting period (YE Sep 2024). However, the emphasis on both appears to have declined slightly over time.

There has been an increasing emphasis on attracting more **international** visitors, attracting higher quality visitors, and increasing safety for visitors. Interestingly, the emphasis on attracting more **domestic** visitors has trended downward over time.

Views on Tourism Snapshot: New Zealand Residents

Research was conducted between October 2023 and September 2024 using Angus & Associates' Views on Tourism© programme. The sample includes n=3,180 New Zealand residents aged 18+ years.

TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism

	New Zealand	Australia	Ireland
Overall TAR:	**49**	51	65
International TAR:	**48** (-3)	49 (-1)	61 (-4)
Domestic TAR:	**58** (-5)	56 (-2)	69 (-1)

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

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

72% 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

angus & ASSOCIATES

(+/-) indicates change in TAR score relative to YE Sep 2023. Note that no prior year data is available for the Overall TAR scores.

OVERALL SENTIMENT TOWARDS TOURISM ACTIVITY

OVERALL TOURISM

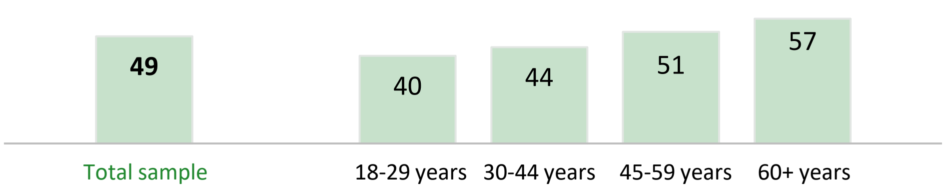
The vast majority of New Zealand residents (95%) agree that tourism is good for New Zealand; however, a smaller proportion (88%) agree that tourism is good for their region.

Despite the benefits of tourism being widely acknowledged by New Zealand residents, more than one third (36%) believe that visitors put too much pressure on New Zealand, and more than a quarter (29%) 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 49).

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 (32), Māori (41) and Indian (43) New Zealanders as well as those who have not travelled in the past 12 months (46).

TOURISM TAR SCORE, BY AGE



Base (YE Sep 2024): Total sample - New Zealand residents n=3,180
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

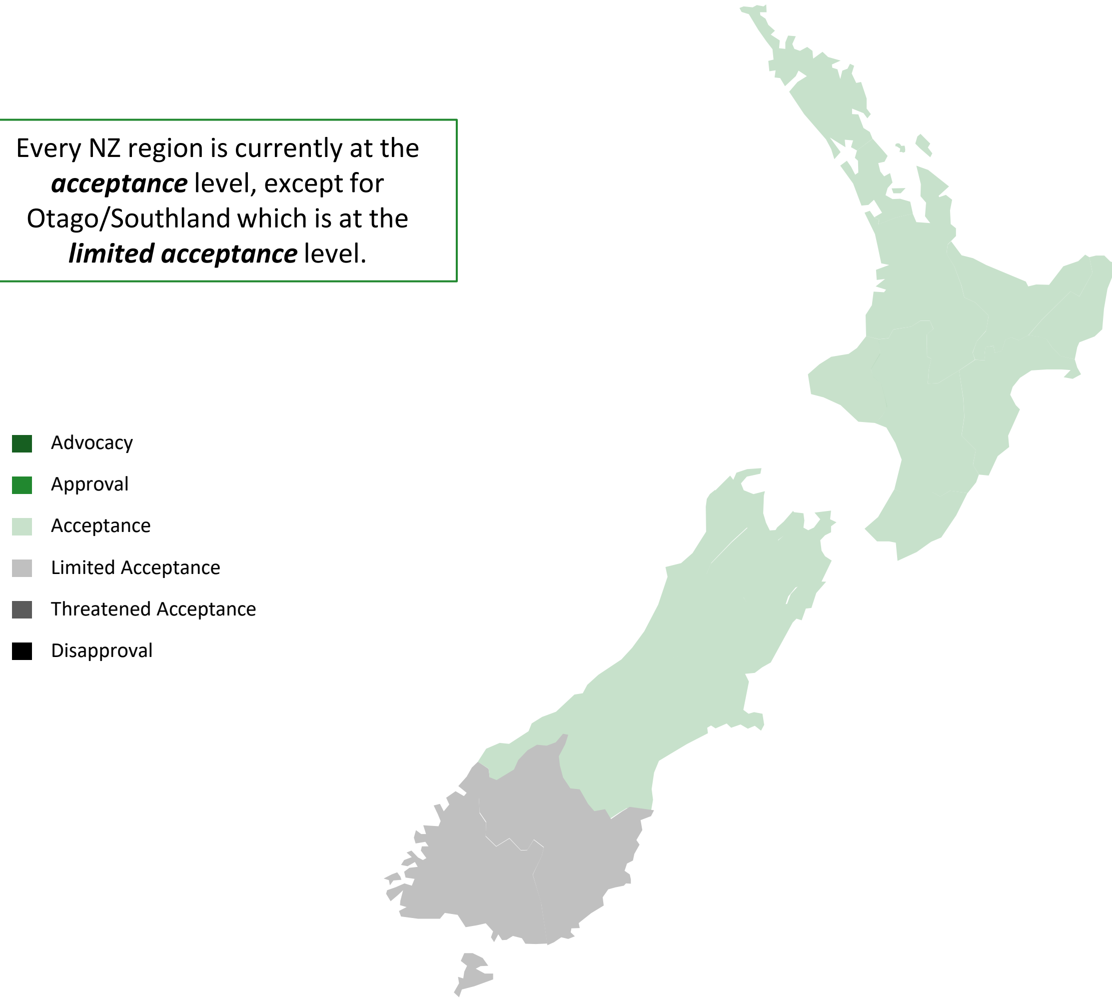
OVERALL TOURISM (CONT.)

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

New Zealand Overall TAR **49**

Australia Overall TAR 51

Ireland Overall TAR* 65



Region	Overall TAR	N=
Northland	48	117
Auckland	48	1006
Waikato	50	288
Bay of Plenty/Gisborne/Hawke's Bay	49	388
Taranaki/Manawatū-Wanganui	52	228
Wellington	56	331
Tasman/Nelson/Marlborough/West Coast	46	121
Canterbury	50	390
Otago/Southland	36	311

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 Sep 2024): NZ residents n =3,180; AU residents n=2,426

*Ireland TAR is based on data collected during Apr-Sep 24 only, from n=2,601 Ireland residents

INTERNATIONAL TOURISM

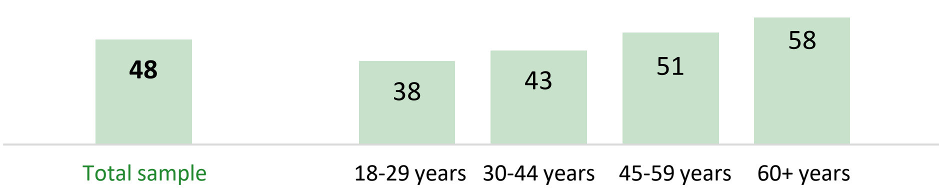
For the period YE Sep 2024, the level of agreement remains high among New Zealand residents that 'international tourism is good for New Zealand' and that 'international tourism is good for my region', with the latter up 2 points on the YE Sep 2023.

At the same time, a significant increase is apparent 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.

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 48) - 3 points lower than in the YE Sep 2023.

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 37) and Indian New Zealanders (at 45), and those who have not travelled domestically or internationally in the past 12 months (at 47).

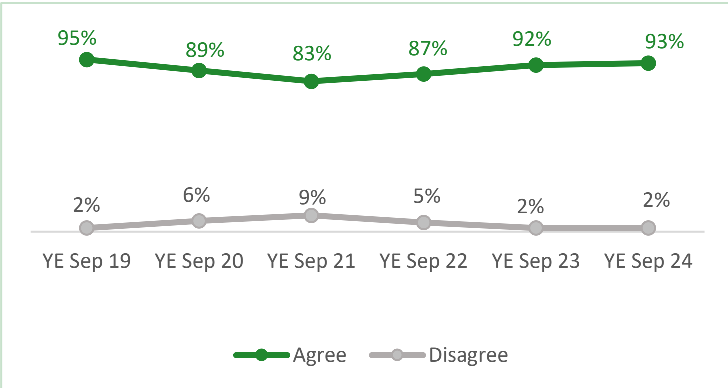
INTERNATIONAL TAR SCORE, BY AGE



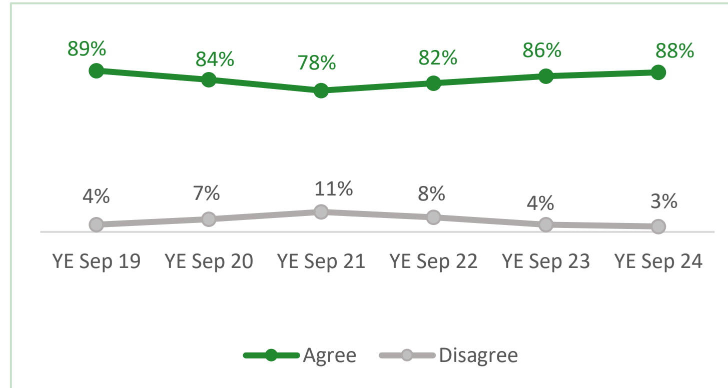
Base: Total sample - New Zealand residents n=3,180
Arrows (⬆/⬇) indicate statistically significant differences vs YE Sept 2023 at 95% confidence level
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

INTERNATIONAL TOURISM (CONT.)

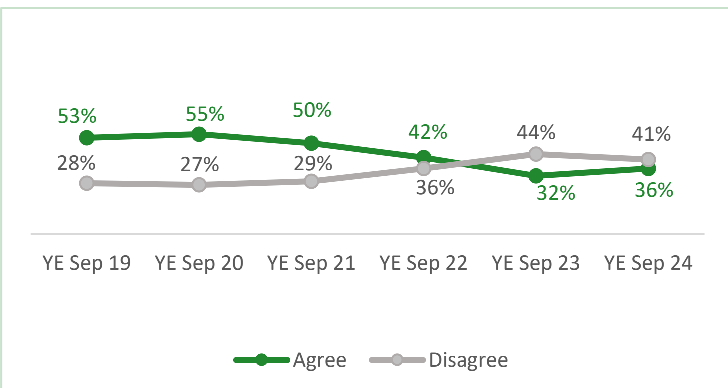
International tourism is good for New Zealand



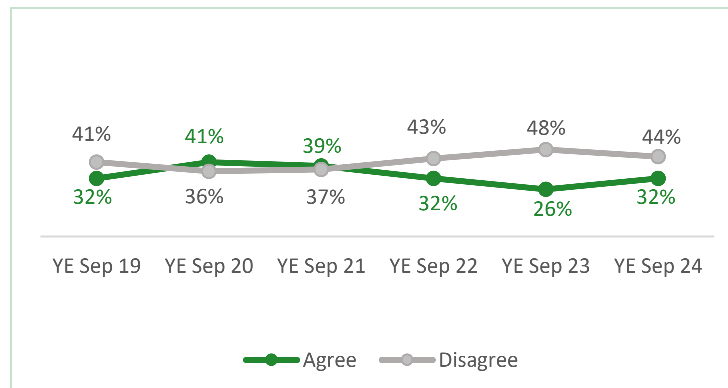
International tourism is good for my region



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 Sep 19 (n=2,504); YE Jun 20 (n=2,994); YE Sep 21 (n=3,063); YE Sep 22 (n=3,164); YE Sep 23 (n=3,234); YE Sep 24 (n=3,180)
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree;
'Neither agree nor disagree' and 'Don't know' responses excluded

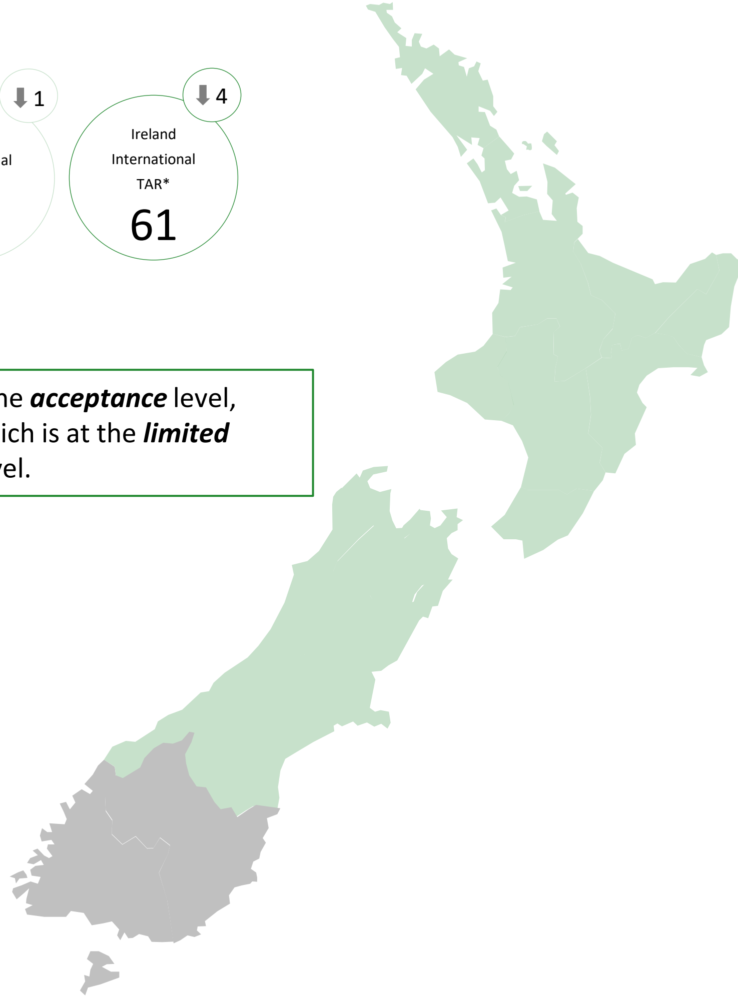
INTERNATIONAL TOURISM (CONT.)

New Zealand International TAR **48** ⬇3

Australia International TAR **49** ⬇1

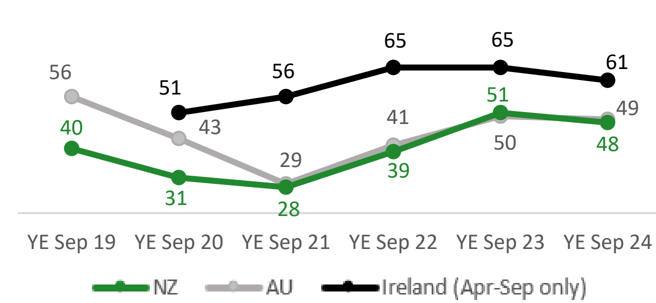
Ireland International TAR* **61** ⬇4

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

Annual International TAR - Trend



Region	International TAR	N=
Northland	50	117
Auckland	50	1006
Waikato	48	288
Bay of Plenty/Gisborne/Hawke's Bay	51	388
Taranaki/Manawatū-Wanganui	50	228
Wellington	52	331
Tasman/Nelson/Marlborough/West Coast	43	121
Canterbury	47	390
Otago/Southland	37	311

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 Sep 2024): NZ residents n =3,180; AU residents n=2,426

*Ireland TAR is based on data collected during Apr-Sep 24 only, from n=2,601 Ireland residents

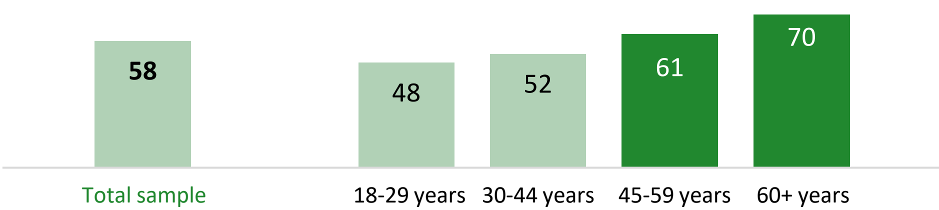
DOMESTIC TOURISM

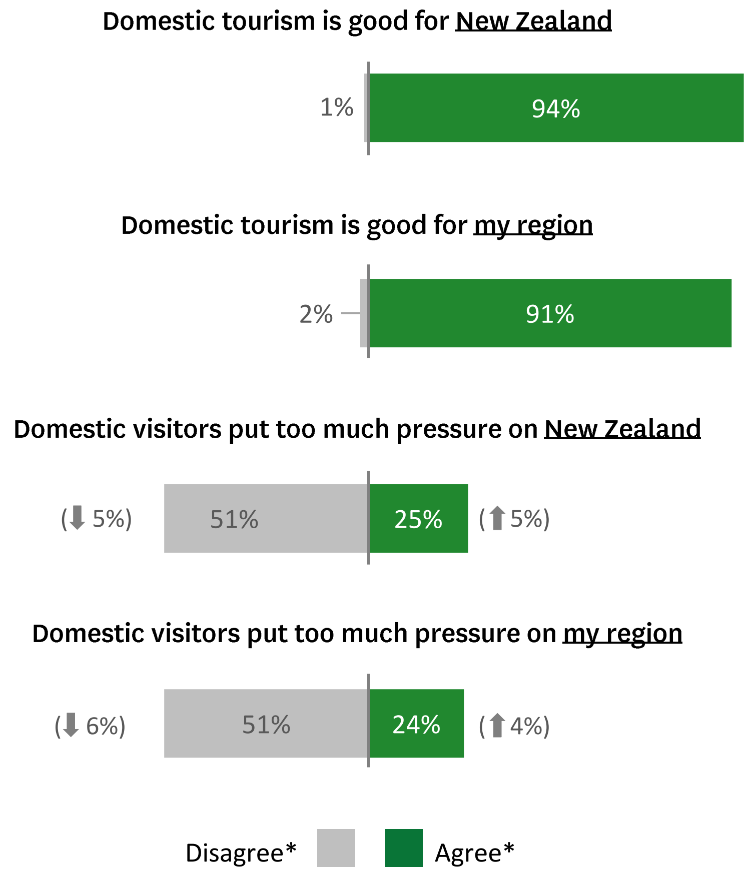
While the level of agreement remains high among New Zealand residents that domestic tourism is good for New Zealand as well as for their region, there is a significant change in views on the pressure that domestic visitors place on New Zealand and on the regions. One in four New Zealand residents (25%) believe that domestic tourism is putting too much pressure on New Zealand and a similar proportion (24%) believe that domestic tourism is putting too much pressure on their region. These proportions are significantly higher than those in the previous year (YE Sep 23).

New Zealand's domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, has fallen to 58, down from 63 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 40 and 51 respectively).

DOMESTIC TAR SCORE, BY AGE

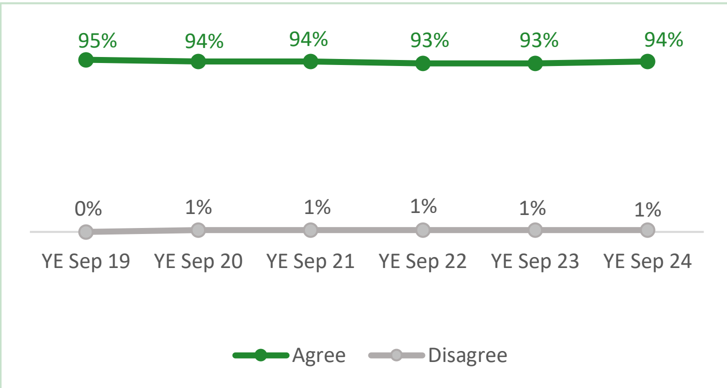




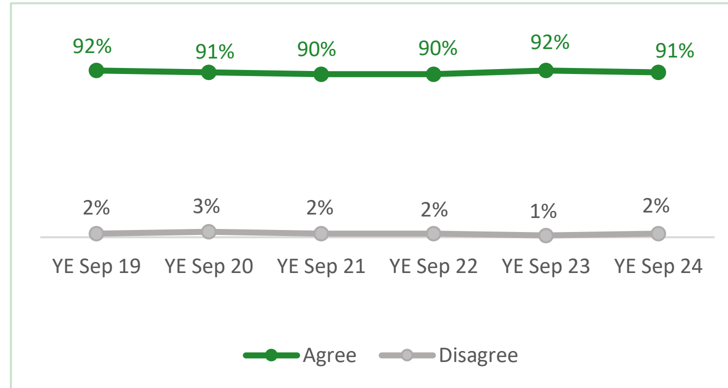
Base: Total sample - New Zealand residents n=3,180
Arrows (⬆/⬇) indicate statistically significant differences vs YE Sep 2023 at 95% confidence level
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

DOMESTIC TOURISM (CONT.)

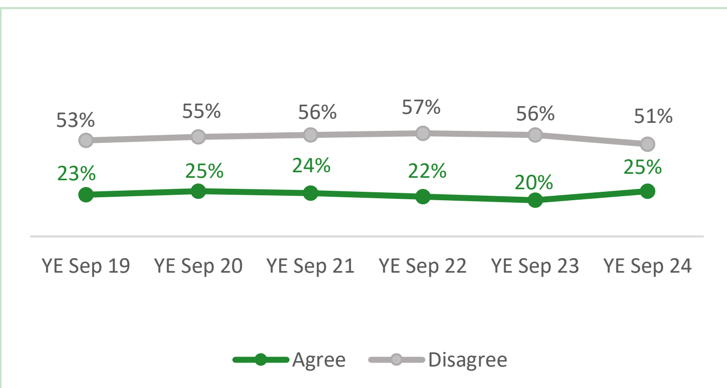
Domestic tourism is good for New Zealand



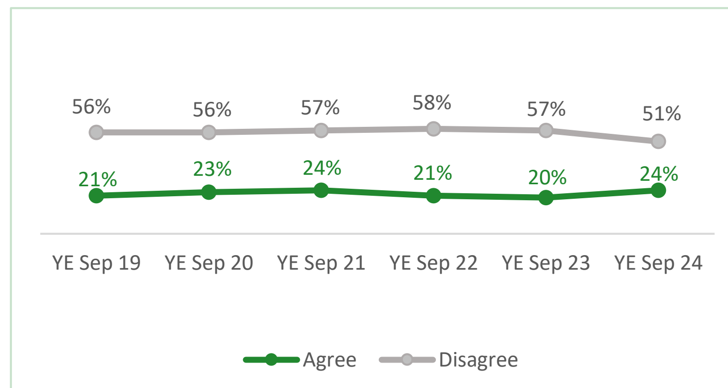
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



Domestic visitors put too much pressure on my region



Base: Total sample - New Zealand residents: YE Sep 19 (n=2,504); YE Jun 20 (n=2,994); YE Sep 21 (n=3,063); YE Sep 22 (n=3,164); YE Sep 23 (n=3,234); YE Sep 24 (n=3,180)
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree;
'Neither agree nor disagree' and 'Don't know' responses excluded

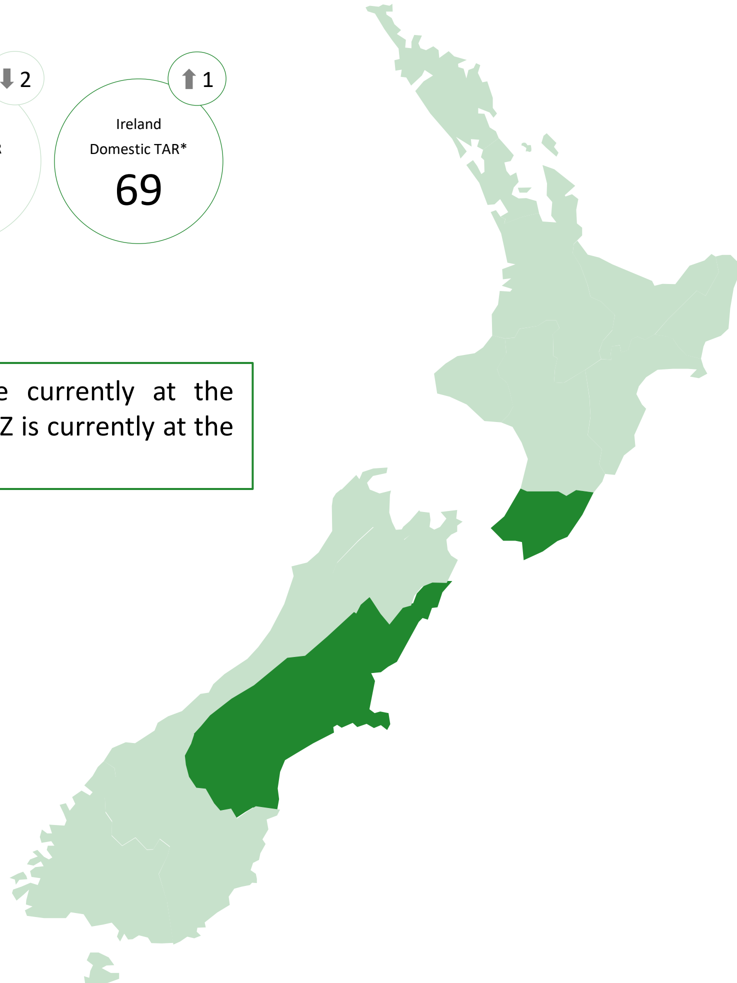
DOMESTIC TOURISM (CONT.)

⬇5
New Zealand Domestic TAR
58

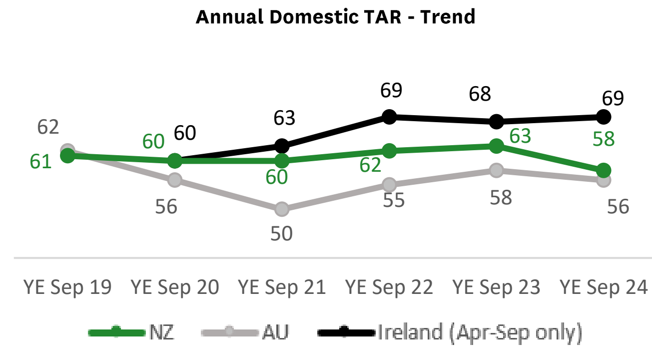
⬇2
Australia Domestic TAR
56

⬆1
Ireland Domestic TAR*
69

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	58	117
Auckland	57	1006
Waikato	57	288
Bay of Plenty/Gisborne/Hawke's Bay	55	388
Taranaki/Manawatū-Wanganui	57	228
Wellington	65	331
Tasman/Nelson/Marlborough/West Coast	55	121
Canterbury	64	390
Otago/Southland	57	311

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 Sep 2024): NZ residents n =3,180; AU residents n=2,426

*Ireland TAR is based on data collected during Apr-Sep 24 only, from n=2,601 Ireland residents

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.

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

	The social wellbeing of New Zealand communities		New Zealand's values, culture and heritage		New Zealand's economy		New Zealand's natural environment	
	Negative*	Positive*	Negative*	Positive*	Negative*	Positive*	Negative*	Positive*
TOURISM *(general)*	3%	75%	4%	76%	4%	84%	17%	44%
International tourism	4%	74%	4%	75%	4%	86%	19%	43%
Domestic tourism	2%	82%	2%	80%	3%	84%	9%	52%

Negative* Positive*

Base (YE Sep 2024): Total sample - New Zealand residents n=3,180
*Negative = Very negative + Negative; Positive = Very positive + Positive;
'Neither positive nor negative' responses excluded

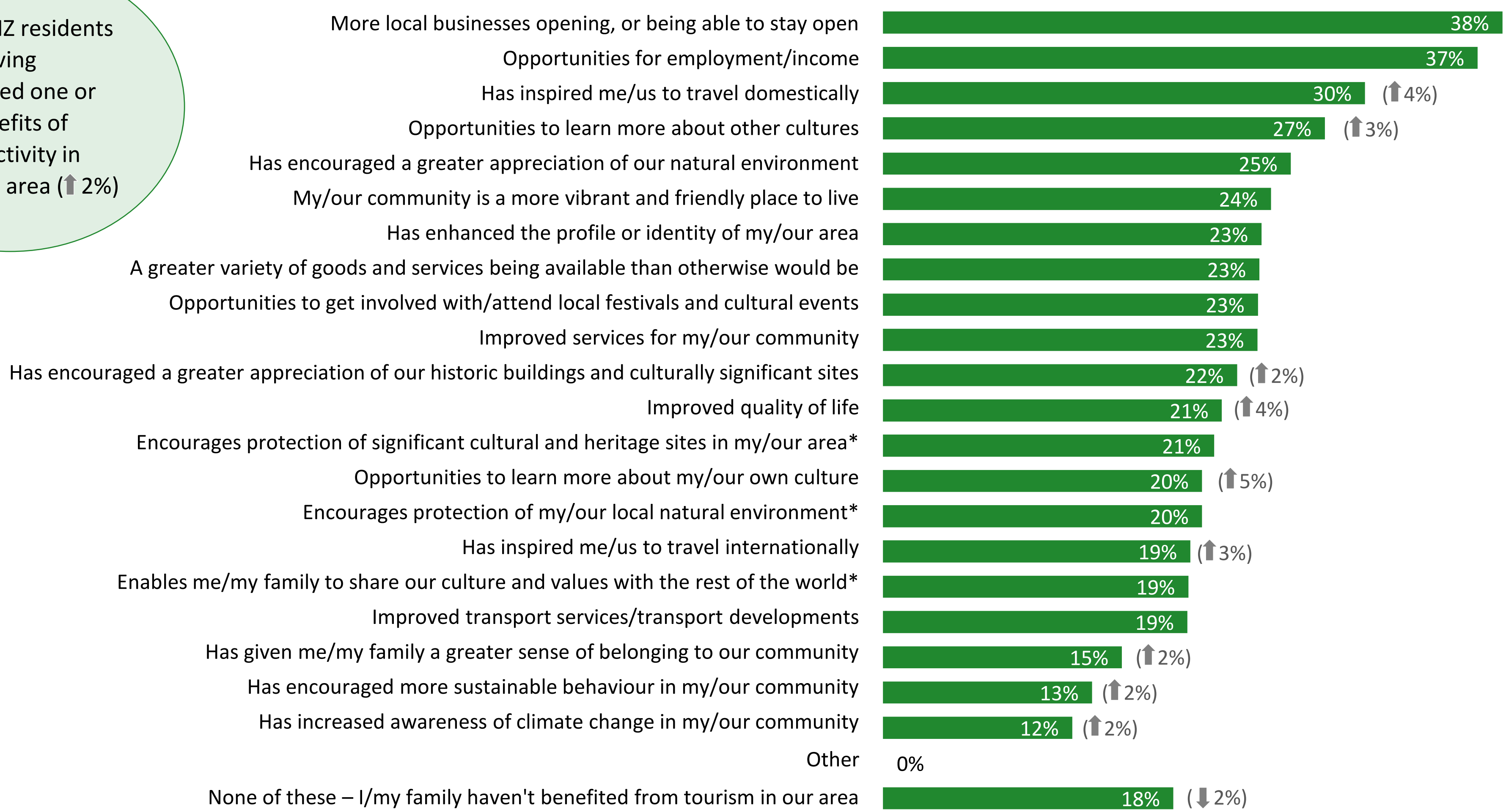
angus & ASSOCIATES

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?

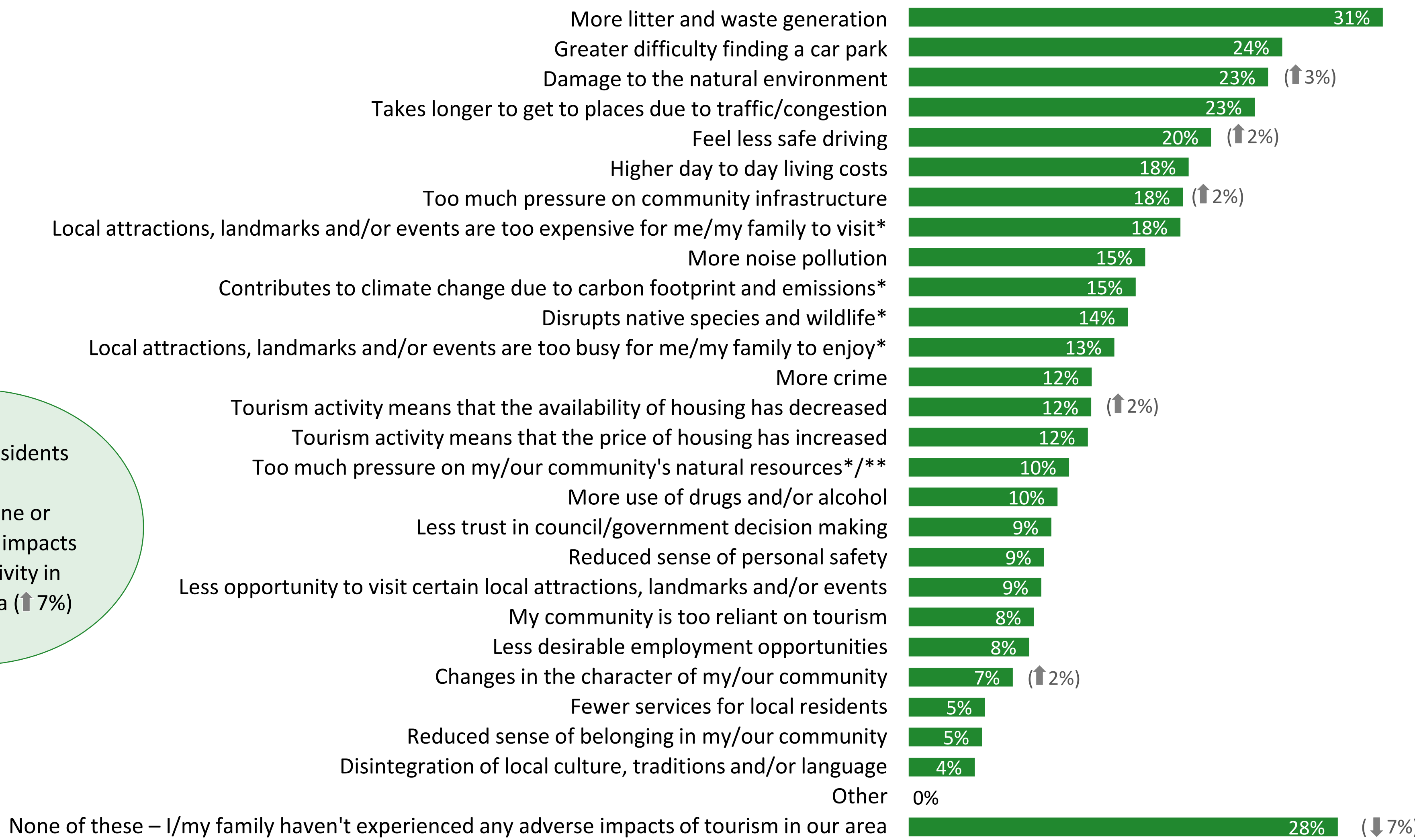
82% of NZ residents report having experienced one or more benefits of tourism activity in their local area (↑ 2%)



Base (YE Sep 2024): Total sample - New Zealand residents n=3,180
Arrows (↑/↓) indicate statistically significant differences vs YE Sep 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?



72% 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

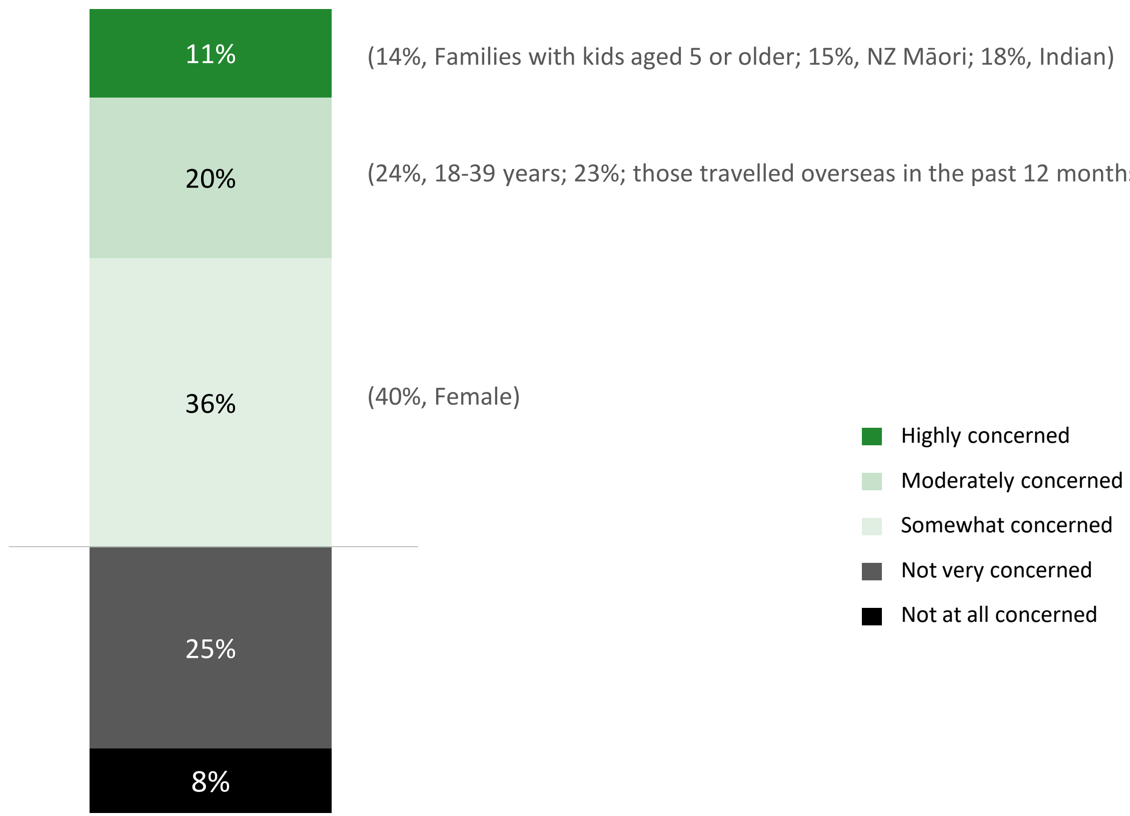
Base (YE Sep 2024): Total sample - New Zealand residents n=3,180
Arrows (↑/↓) indicate statistically significant differences vs YE Sep 2023 at 95% confidence level
*Options added in Oct 23 so no comparison available

ENVIRONMENTAL IMPACTS OF TOURISM

CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

67% 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?

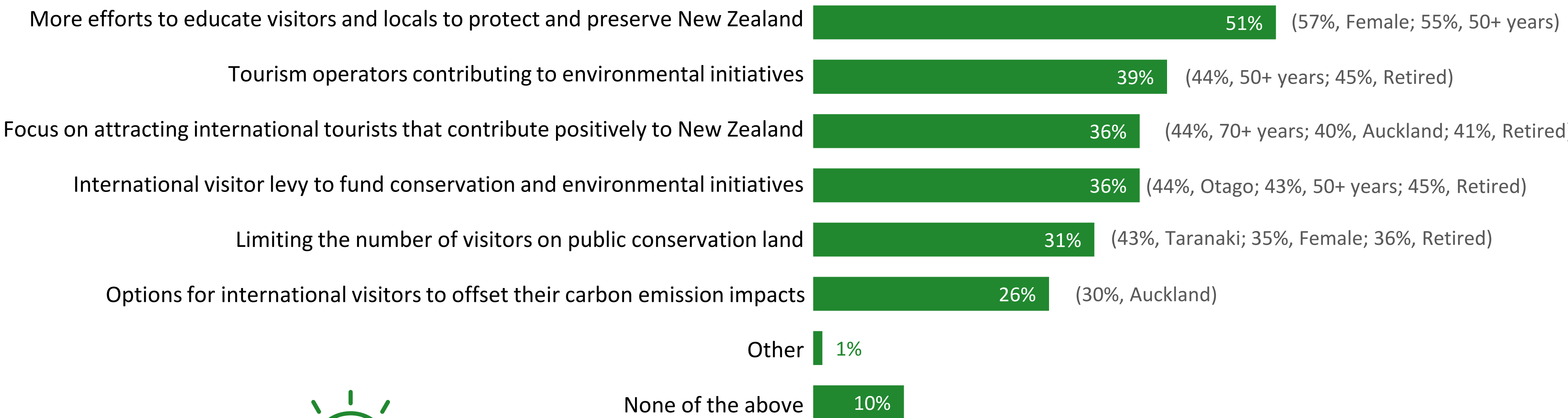


Base (YE Sep 2024): Total sample – New Zealand residents (excluding Don't know/Not sure): n=3,065

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?

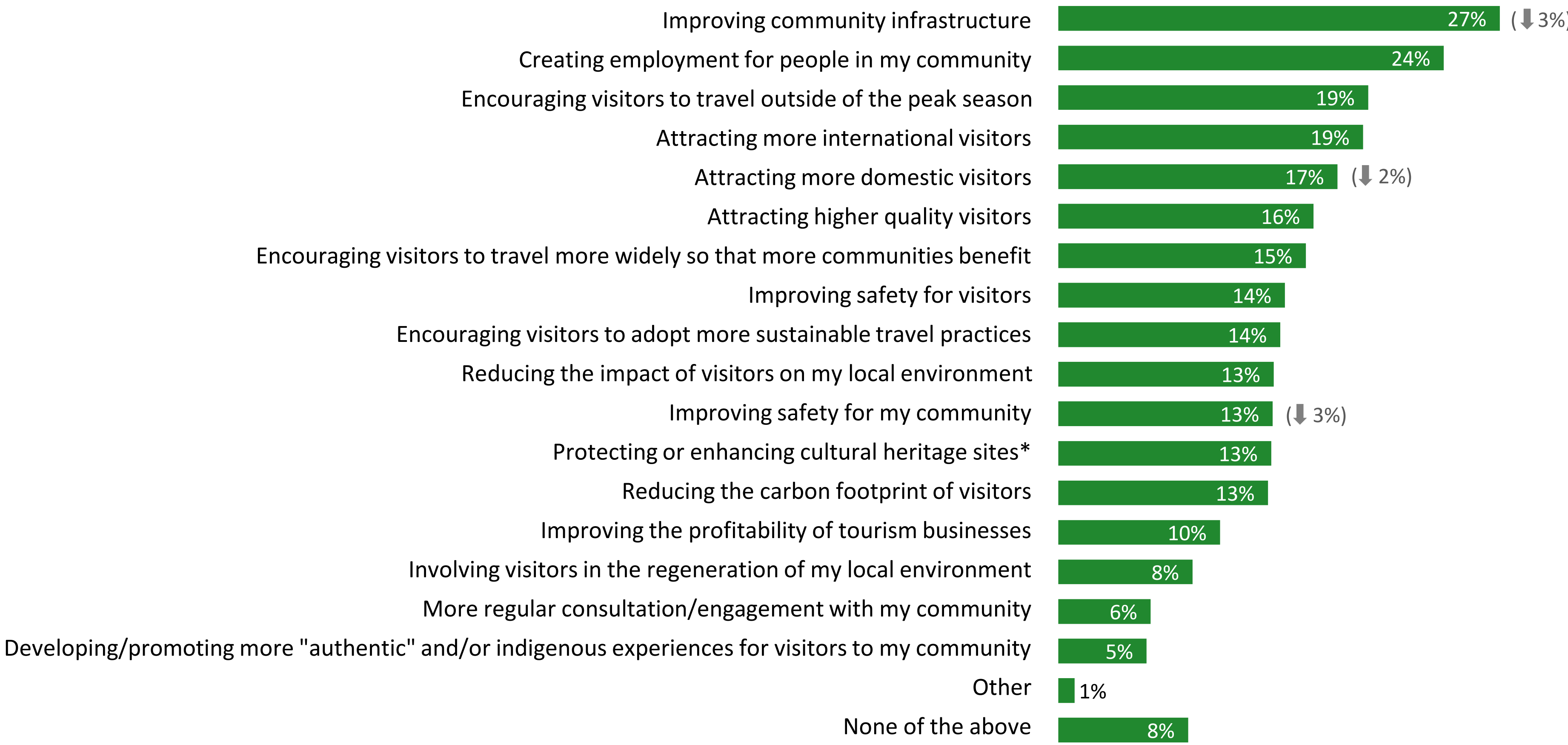


Base (YE Sep 2024): Total sample - New Zealand residents n=3,180

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 Sep 2024): Total sample - New Zealand residents n=3,180
Arrows (⬆/⬇) indicate statistically significant differences vs YE Sep 2023 at 95% confidence level
*Option added in Oct 23 so no comparison available

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.

Base (YE Sep 2024): Total sample - New Zealand residents n=3,180
Arrows (⬆ / ⬇) indicate statistically significant differences vs YE Sep 2023 at 95% confidence level

DEEP DIVE

SNAPSHOT ON FUTURE FOCUS OF TOURISM INDUSTRY

The top 10 areas of desired future focus for the tourism industry are shown for the five-year period ending September 2024. These are presented in rank order for the year ending September 2024 (from most to least frequently selected) and their ranking also shown for each of the last five years.

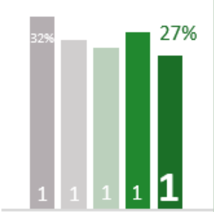
FOR THE PAST 5 YEARS

- Improving community infrastructure and creating employment for people in the community have consistently been the top two priorities since 2020 but are slightly less prominent than they were.
- There has been a considerable increase in support for attracting more international visitors, which is the third ranked priority for the last two years, while support for attracting domestic visitors has declined.
- The emphasis on encouraging visitors to adopt more sustainable travel practices has declined slightly and is currently the eighth-ranked priority.
- Improving safety for visitors has gained more attention, making it into the top ten issues for the first time in 2024.

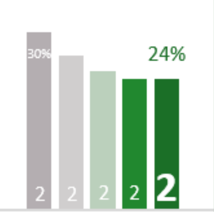
FOR YE SEPTEMBER 2024

- Otago residents are more likely to place emphasis on improving community infrastructure and encouraging visitors to travel outside of the peak season.
- Compared with other regions, residents of Auckland, Bay of Plenty and Manawatu-Whanganui are more likely to place emphasis on improving safety for visitors.
- Younger people are more likely to prioritise improving safety for visitors and the community, protecting or enhancing cultural heritage sites, and reducing the environmental impact of visitors. Older/retired people are more likely to prioritise improving community infrastructure, encouraging visitors to travel outside of the peak season, attracting more international visitors, and higher quality visitors.
- Māori New Zealanders are more likely to emphasise improving safety for visitors, protecting or enhancing cultural heritage sites, and developing more authentic and/or indigenous experiences for visitors.

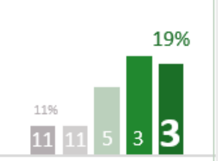
TOP 10 AREAS FOR FUTURE FOCUS 2020-2024



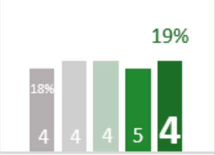
Improving community infrastructure



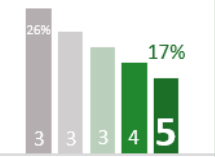
Creating employment for people in my community



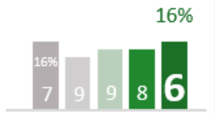
Attracting more international visitors



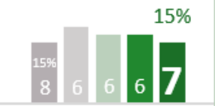
Encouraging visitors to travel outside of the peak season



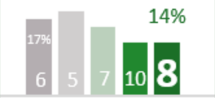
Attracting more domestic visitors



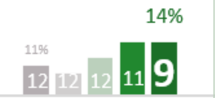
Attracting higher quality visitors



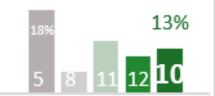
Encouraging visitors to travel more widely so that more communities benefit



Encouraging visitors to adopt more sustainable travel practices



Improving safety for visitors



Reducing the impact of visitors on my local environment

Legend

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	74%
Travelled to Australia	21%
Travelled overseas (outside of Australasia)	24%
Have not travelled	16%
Base: Total sample	n=3,180

Region	
Northland	4%
Auckland	32%
Waikato	9%
Bay of Plenty	8%
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=3,180

Ethnicity	
New Zealand European	67%
Other European	6%
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	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	1%
Base: Total sample	n=3,180

Sample distribution is modelled to the 2018 population estimates, amended as necessary based on relevancy.