VIEWS ON TOURISM© PROGRAMME

VIEWS ON TOURISM: NEW ZEALAND

YEAR ENDING JUNE 2026

angus & ASSOCIATES

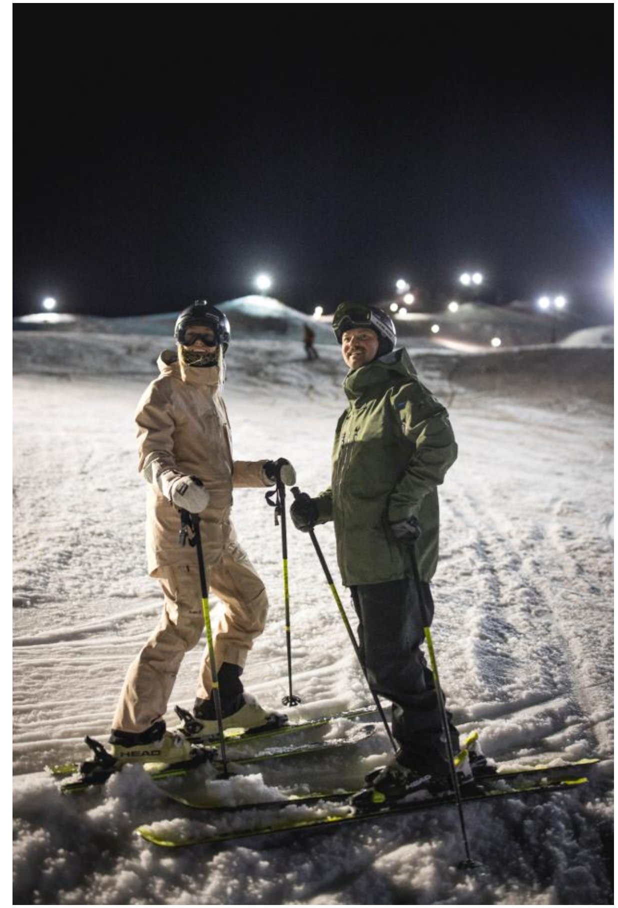
INTRODUCTION

This report updates findings of the Views on Tourism© research to include the year ending June 2026.[1] Tourism New Zealand is Angus & Associates' country-level partner for the Views on Tourism© research programme in New Zealand.

The Views on Tourism survey 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, both on the country as a whole and their region, and contrasts this with 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** (while also retaining separate international and domestic tourism sentiment measures), and
- residents' views on the impacts of tourism across the 'four capitals' (New Zealand's economy, environment, society, and culture).



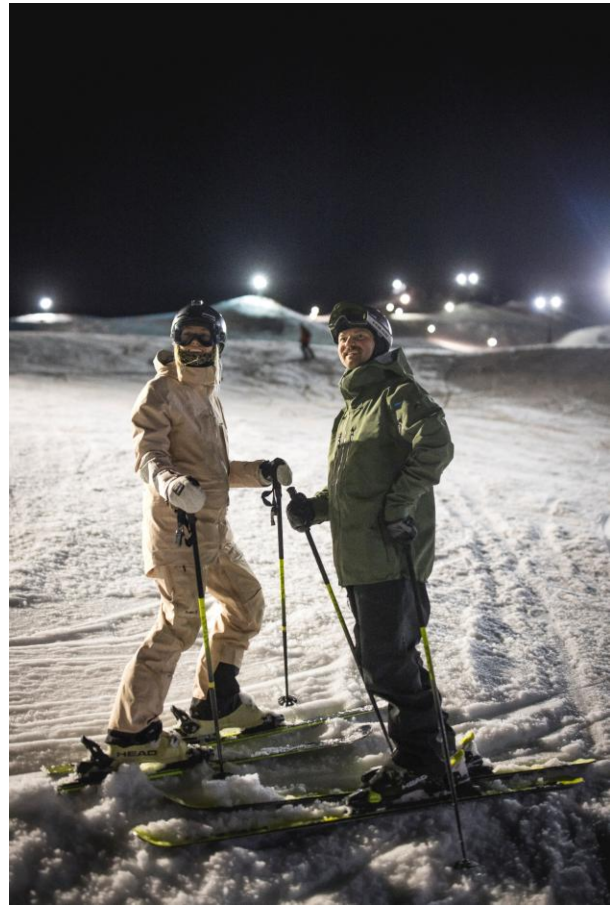
[1] Tourism New Zealand uses Angus & Associates' Views on Tourism© research methodology

METHODOLOGY

The research is undertaken with a sample of at least n=250 New Zealand residents each month, with the survey sample being representative of the New Zealand population (aged 18 years+) by age, gender and region.

Data is collected continuously through the year, and the sample accumulates to at least n=3,000 on an annual basis. The main survey sample is drawn from a leading online research panel, and additional fieldwork is undertaken by intercept in Rotorua and Queenstown to boost samples in those regions. The final dataset is weighted by age, gender and region to reflect population proportions according to 2023 Census data.

For key measures, results for Australia and Ireland are included in the report to provide context for the New Zealand results. 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 adverse impacts. The calculation gives equal weight to responses in relation to each statement.
- Separate TAR scores are calculated for international and domestic tourism and for tourism overall (i.e. there are separate scores for international tourism, domestic tourism, and tourism overall).
- All TAR scores are calculated using the same methodology (i.e. they are comparable in this sense).
- The TAR is plotted on a six-section 'social license' scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' overall perceptions of tourism ('tourism sentiment') on an ongoing basis.

KEY INSIGHTS

Tourism benefits & adverse impacts

Almost seven out of ten New Zealand residents have engaged with tourism or visitors in some capacity over the past two years. Correspondingly, a large majority of New Zealanders (83%) report personally benefiting from tourism activity within their local area. When reflecting on these positive impacts, the most common benefits cited by residents were the creation of new employment and income opportunities (36%), support for local businesses (35%), and the chance to learn more about other cultures (29%).

Despite these recognised benefits, a significant portion of the population continues to feel the negative effects of the visitor economy. Nearly three quarters of residents (74%) stated that they were negatively impacted by local tourism activity in the year ending June 2026. The most prevalent concerns regarding these adverse impacts were increased litter and waste (30%), greater difficulty finding car parking (25%), and damage to the natural environment (23%).

Tourism Approval Rating (TAR) scores

The Tourism Approval Rating (TAR) provides an index score to measure residents' overall perceptions of tourism. For the year ending June 2026, the TAR score for overall tourism in New Zealand remained stable at 47, which indicates a general level of 'acceptance' amongst the public. TAR scores for both international and domestic tourism have also held steady at 47 and 58, respectively.

While TAR scores are currently holding steady, there is a gradual upward trend in New Zealanders reporting that (international and/or domestic) tourism places too much pressure on their communities and the country. Future quarters will indicate whether this growing concern eventually drives a shift in TAR scores.

Deep dive analysis

An in-depth analysis of verbatim survey feedback from July 2024 to June 2026 reveals that public perceptions of visitor pressure centre around four core sub-themes: year-round transport and infrastructure strain (21%), local displacement and affordability (17%), destination crowding and management (16%) and environmental and resource degradation (9%). Longitudinal tracking shows some seasonal fluctuations but an overall consistency in feedback over time.

For a more detailed breakdown of these themes, please refer to the deep dive section on page 34.

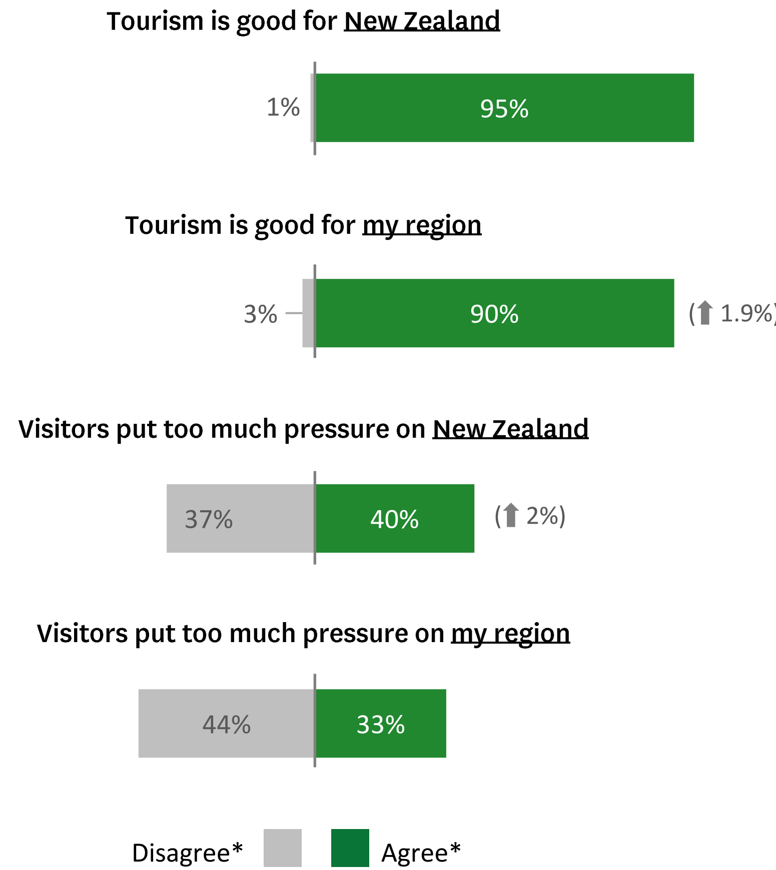
OVERALL SENTIMENT TOWARDS TOURISM ACTIVITY

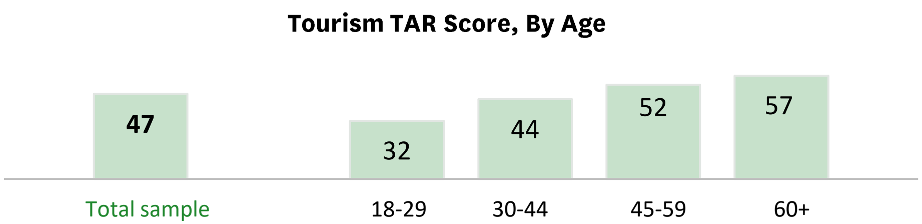
OVERALL TOURISM

The vast majority of New Zealand residents agree that tourism is good for New Zealand (95%) and/or for their region (90%). The proportion who see tourism as good for their region has increased by 2% in the latest year.

At the same time, four in ten (40%) believe that visitors put too much pressure on New Zealand, and one third (33%) that visitors put too much pressure on their region. The proportion of Kiwis who believe that tourism places too much pressure on New Zealand has increased by 2% year on year.

For the year ending June 2026, 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 47). By age, younger New Zealand residents continue to view tourism less favourably than older age groups.

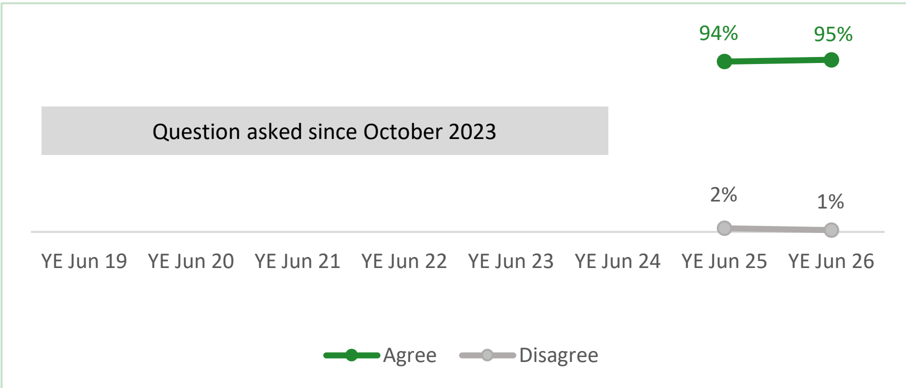




Base (YE Jun 2026): Total sample - New Zealand residents n=3,164
Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses are excluded

OVERALL TOURISM (CONT.)

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

Base: Total sample - New Zealand residents: YE Jun 25 (n=3,177), YE Jun 26 (n=3,164)
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses are excluded

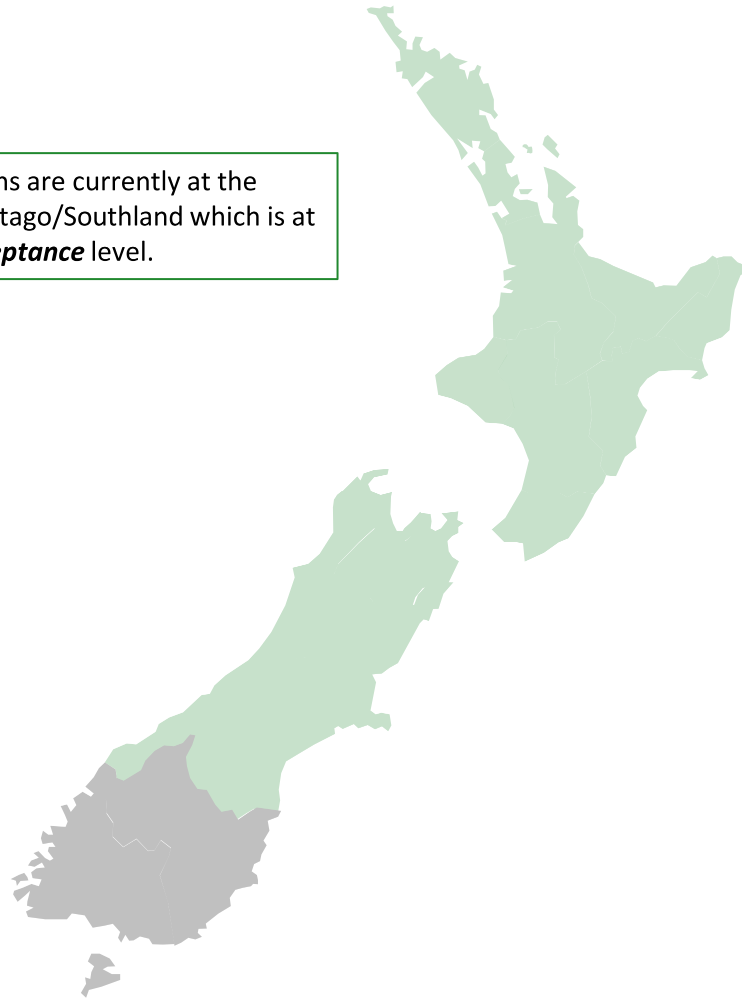
OVERALL TOURISM (CONT.)

New Zealand Overall TAR
47
No change

Australia Overall TAR
51
No change

Ireland Overall TAR*
63
⬇ 2

The majority of NZ regions are currently at the ***acceptance*** level, excluding Otago/Southland which is at the ***limited acceptance*** level.



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

Region	Overall TAR	N=
Northland	45	122
Auckland	50	1,042
Waikato	45	310
Bay of Plenty/Gisborne/Hawke's Bay	44	387
Taranaki/Manawatu-Wanganui	53	227
Wellington	51	337
Tasman/Nelson/Marlborough/West Coast	42	119
Canterbury	45	420
Otago/Southland	37	305

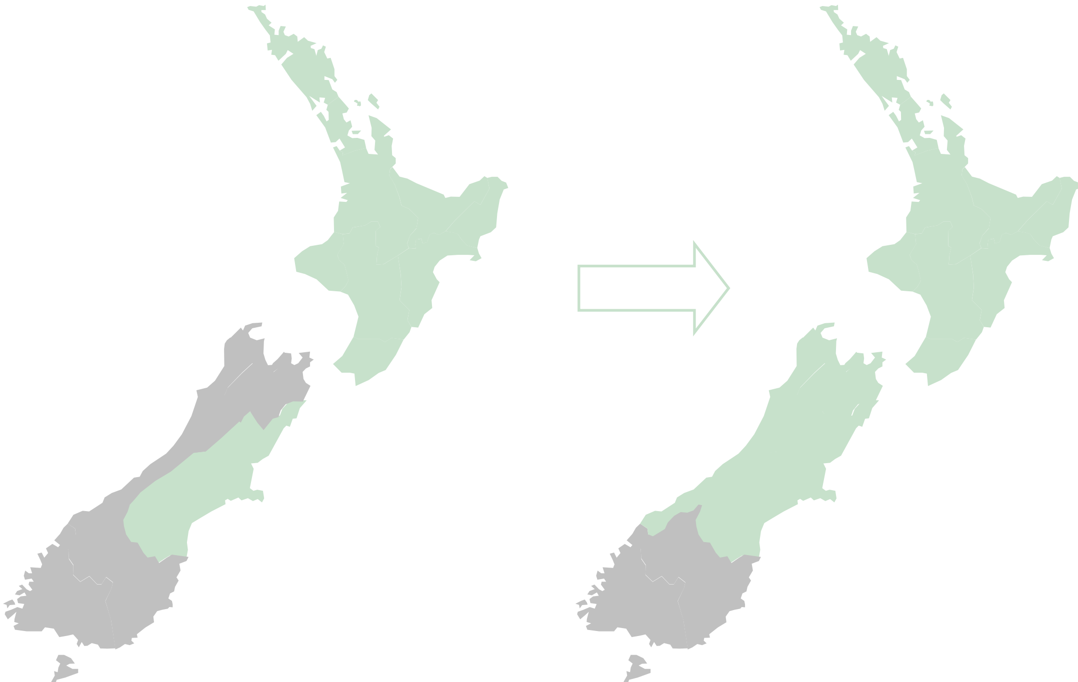
Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. Regional TAR scores should be treated as indicative only - they show there is some variance at a regional level, and they provide context for the national TAR score. More detailed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

Base (YE Jun 2026): NZ residents n =3,164; AU residents n=2,433
*Ireland TAR is based on data collected during Apr-Sep 25 only, from n=3,805 Ireland residents

OVERALL TOURISM (CONT.)

YE Jun 2025
New Zealand Overall TAR: 47

YE Jun 2026
New Zealand Overall TAR: 47



Advocacy
Approval
Acceptance
Limited Acceptance
Threatened Acceptance
Disapproval

Annual Overall TAR - Trend

Region	YoY shift in overall TAR scores
Northland	↓ 3
Auckland	↑ 1
Waikato	↓ 8
Bay of Plenty/Gisborne/Hawke's Bay	↓ 5
Taranaki/Manawatu-Wanganui	↑ 4
Wellington	↑ 3
Tasman/Nelson/Marlborough/West Coast	↑ 4
Canterbury	↓ 1
Otago/Southland	No change

Base (YE Jun 2026): NZ residents n =3,164; AU residents n=2,433
*Ireland TAR is based on data collected during Apr-Sep 25 only, from n=3,805 Ireland residents

INTERNATIONAL TOURISM

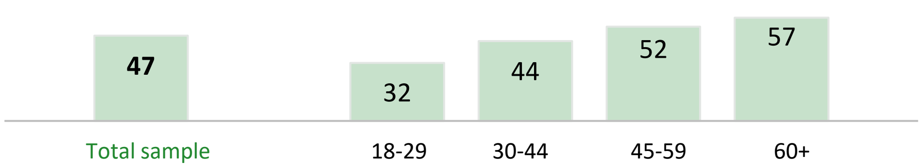
The international TAR score, which considers the positive and negative impacts of international tourism, is at the level of 'acceptance' for New Zealand residents (at 47). This matches the YE June 2025 level.

The vast majority of New Zealand residents agree that international tourism is good for New Zealand (94%) and/or for their region (90%). The proportion of New Zealand residents who believe tourism is good for their region has trended upward in the years post-COVID, from 86% in YE June 2023 to 90% in the latest year.

At the same time, almost four in ten (39%) believe that international visitors put too much pressure on New Zealand, and one third (34%) that international visitors put too much pressure on their region. Both proportions have also trended upward in the years post-COVID.

By age, younger New Zealand residents continue to view international tourism less favourably than older age groups.

International TAR Score, By Age



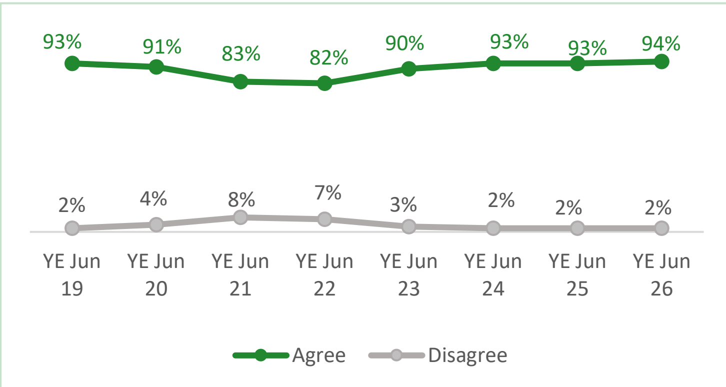
Base (YE Jun 2026): Total sample - New Zealand residents n=3,164

Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level

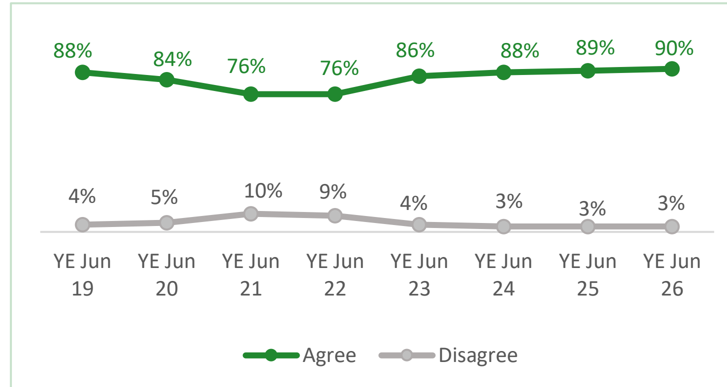
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses are excluded

INTERNATIONAL TOURISM (CONT.)

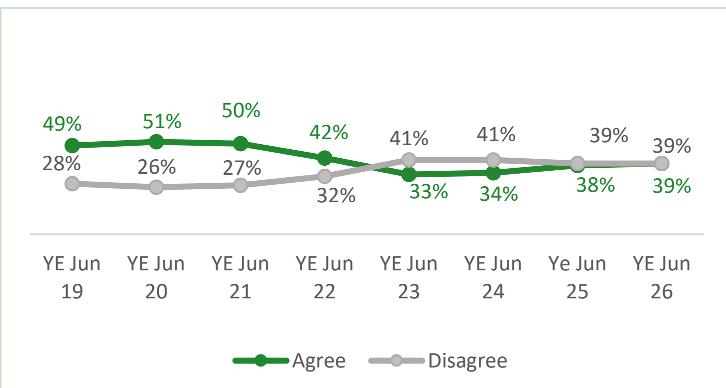
International tourism is good for New Zealand



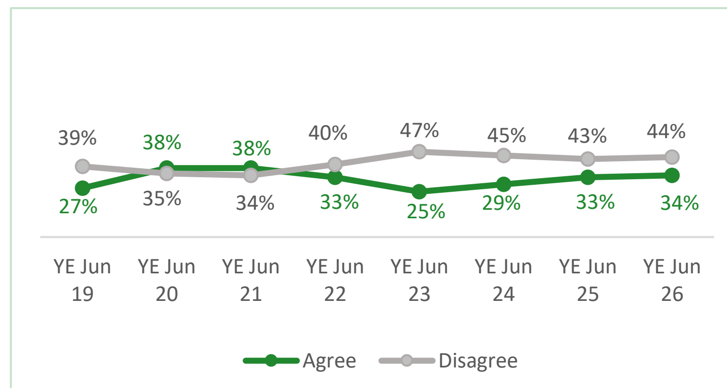
International tourism is good for my region



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); YE Jun 25 (n=3,177); YE Jun 26 (n=3,164)
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

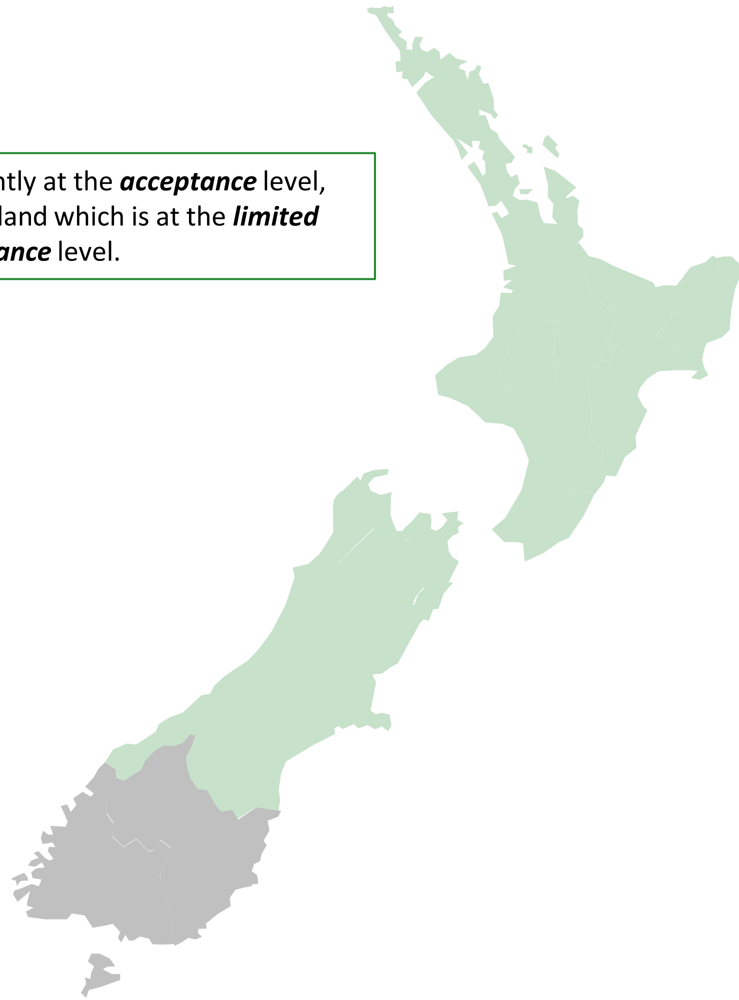
INTERNATIONAL TOURISM (CONT.)

New Zealand International TAR **47** (No change)

Australia International TAR 49 (⬇1)

Ireland International TAR* 60 (⬇1)

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	45	122
Auckland	50	1,042
Waikato	44	310
Bay of Plenty/Gisborne/Hawke's Bay	47	387
Taranaki/Manawatu-Wanganui	50	227
Wellington	50	337
Tasman/Nelson/Marlborough/West Coast	43	119
Canterbury	45	420
Otago/Southland	37	305

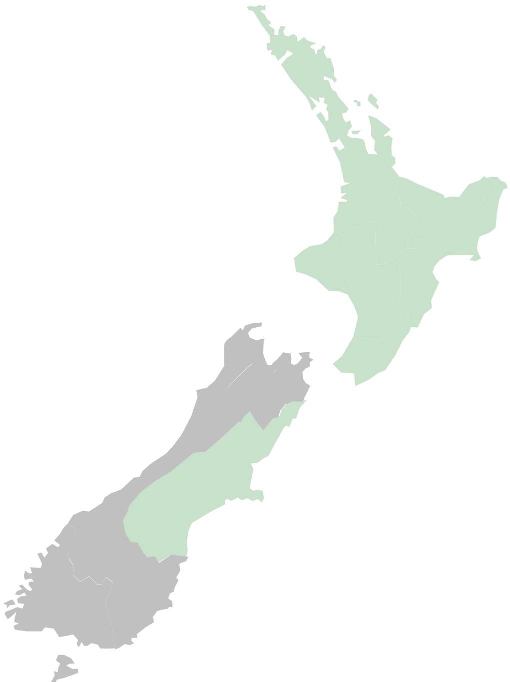
Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. Regional TAR scores should be treated as indicative only - they show there is some variance at a regional level, and they provide context for the national TAR score. More detailed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

Base (YE Jun 2026): NZ residents n =3,164; AU residents n=2,433

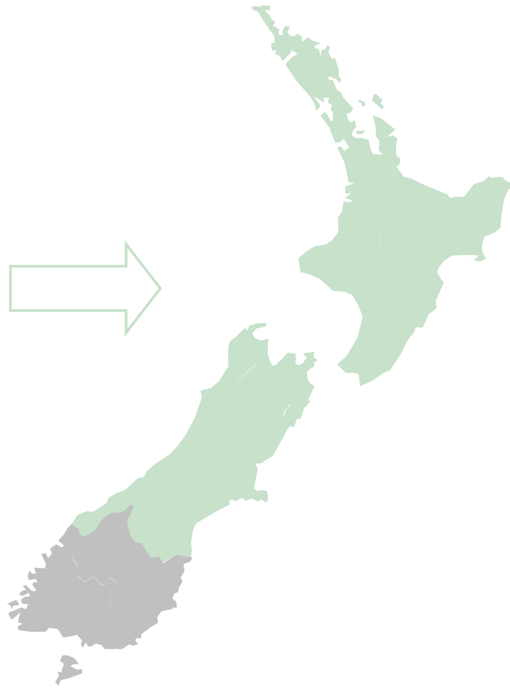
*Ireland TAR is based on data collected during Apr-Sep 25 only, from n=3,805 Ireland residents

INTERNATIONAL TOURISM (CONT.)

YE Jun 2025
New Zealand International TAR: 47

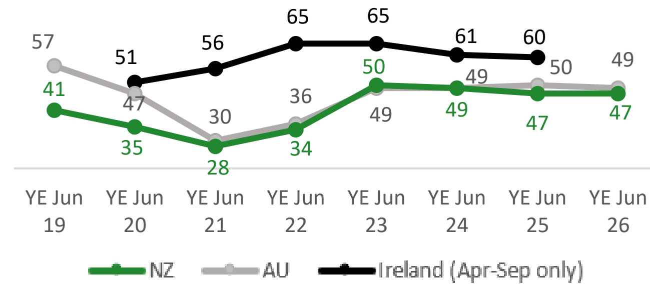


YE Jun 2026
New Zealand International TAR: 47



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

Annual International TAR - Trend



Region	YoY shift in international TAR scores
Northland	↓ 6
Auckland	↑ 1
Waikato	↓ 9
Bay of Plenty/Gisborne/Hawke's Bay	↓ 2
Taranaki/Manawatu-Wanganui	↑ 2
Wellington	↑ 2
Tasman/Nelson/Marlborough/West Coast	↑ 5
Canterbury	No change
Otago/Southland	↑ 2

Base (YE Jun 2026): NZ residents n =3,164; AU residents n=2,433
*Ireland TAR is based on data collected during Apr-Sep 25 only, from n=3,805 Ireland residents

DOMESTIC TOURISM

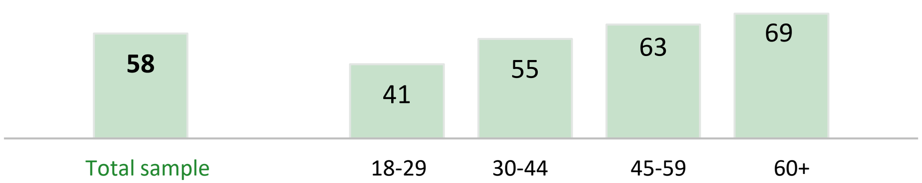
As with international tourism and tourism overall, the great majority of New Zealand residents agree that domestic tourism is good for New Zealand (94%) and/or for their region (92%).

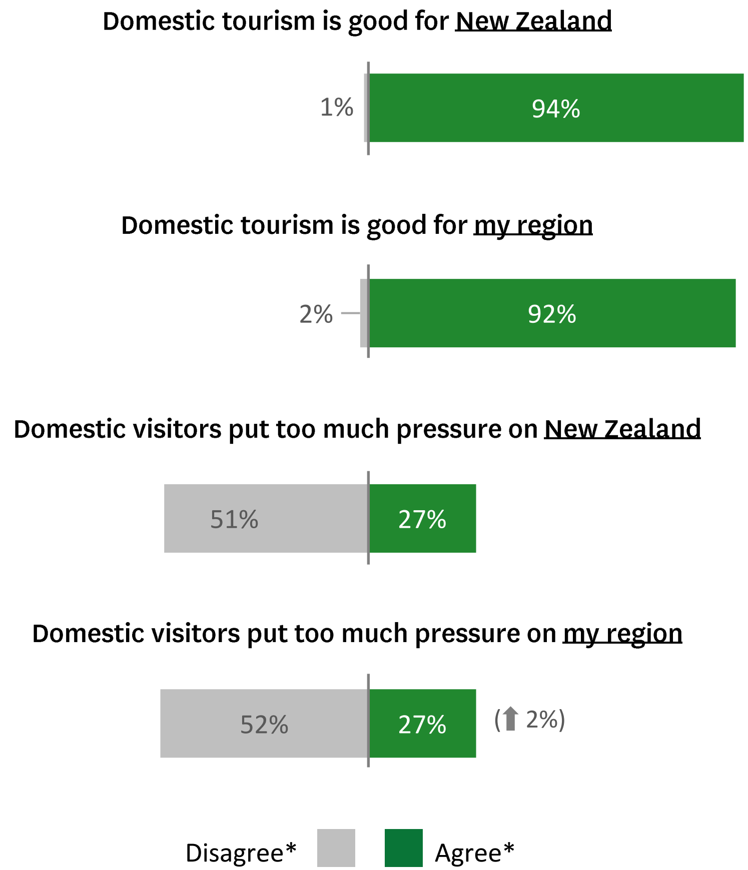
A quarter (27%) believe that domestic visitors put too much pressure on New Zealand, and the same proportion that domestic visitors put too much pressure on their region (up by 2% year on year). Both proportions have trended upward since the year ending June 2023.

New Zealand's domestic TAR score, which balances the positive and negative impacts of domestic tourism, is 58 in the year ending June 2026.

As for international tourism, support for domestic tourism has a correlation with age (older residents are more likely to be supportive).

Domestic TAR Score, By Age

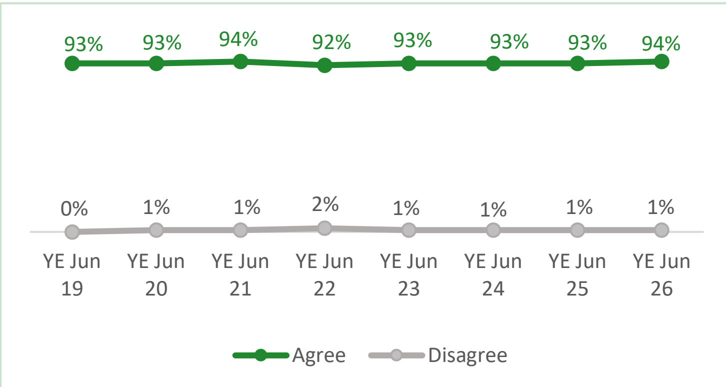




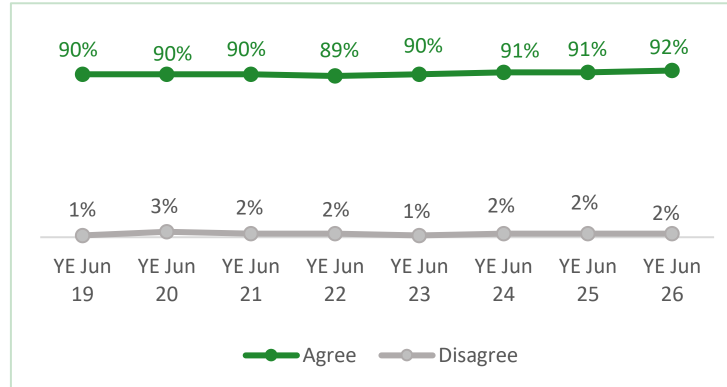
Base (YE Jun 2026): Total sample - New Zealand residents n=3,164
Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level
*Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses are excluded

DOMESTIC TOURISM (CONT.)

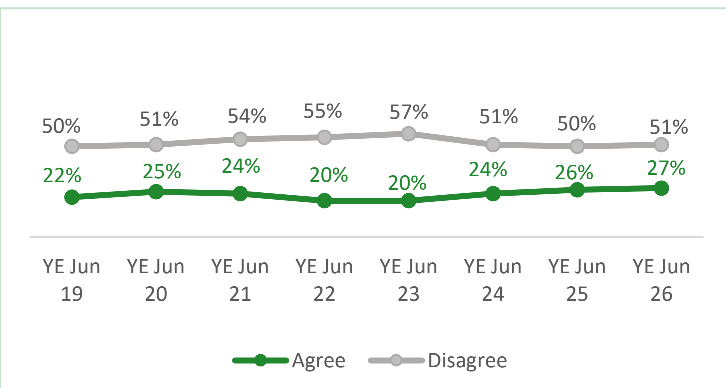
Domestic tourism is good for New Zealand



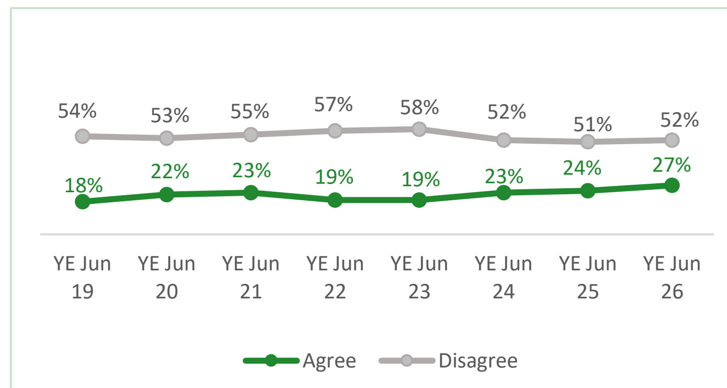
Domestic tourism is good for my region



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 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); YE Jun 25 (n=3,177); YE Jun 26 (n=3,164)

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

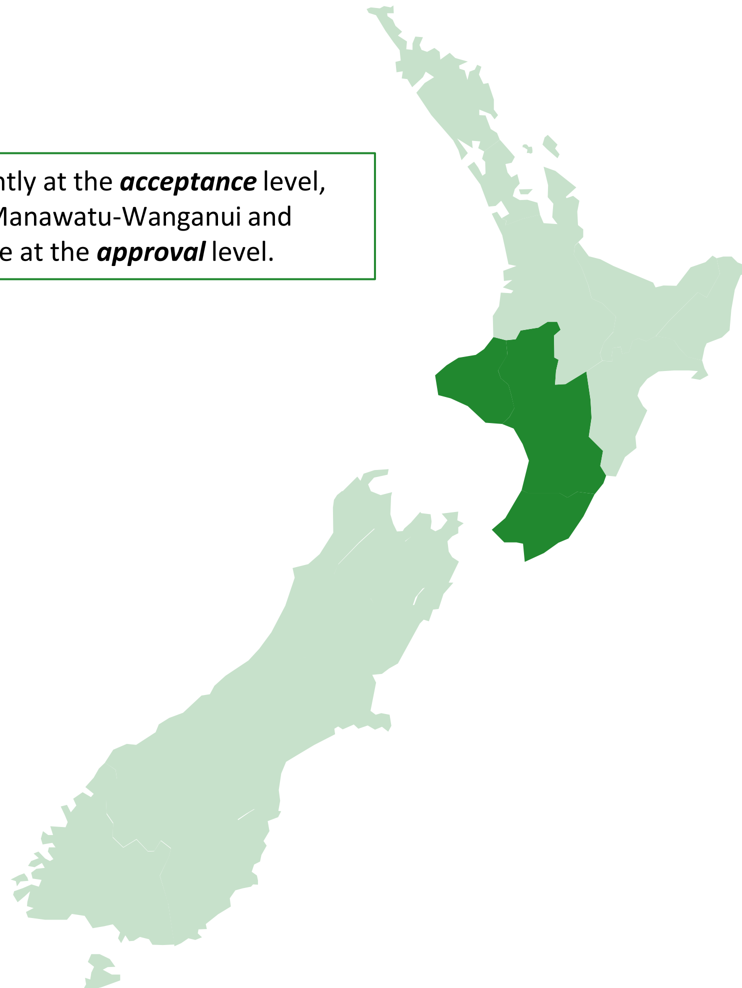
DOMESTIC TOURISM (CONT.)

New Zealand Domestic TAR **58** (No change)

Australia Domestic TAR 55 (↓1)

Ireland Domestic TAR* 66 (↓3)

Every NZ region is currently at the ***acceptance*** level, except for Taranaki/Manawatu-Wanganui and Wellington which are at the ***approval*** level.



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

Region	Domestic TAR	N=
Northland	54	122
Auckland	59	1,042
Waikato	56	310
Bay of Plenty/Gisborne/Hawke's Bay	53	387
Taranaki/Manawatu-Wanganui	65	227
Wellington	63	337
Tasman/Nelson/Marlborough/West Coast	58	119
Canterbury	59	420
Otago/Southland	52	305

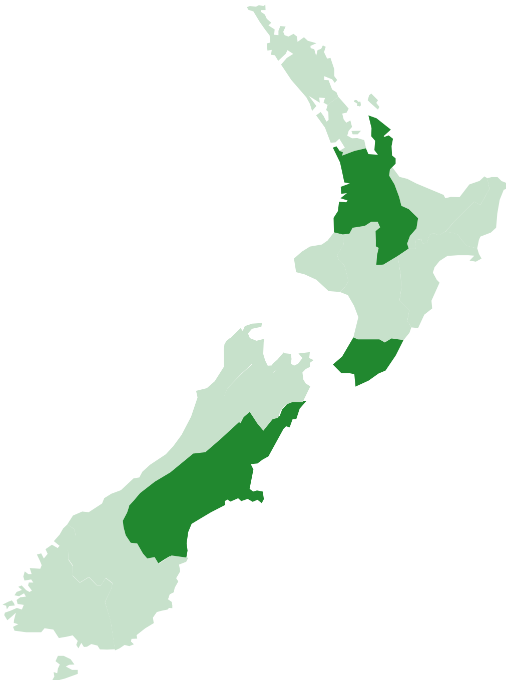
Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. Regional TAR scores should be treated as indicative only - they show there is some variance at a regional level, and they provide context for the national TAR score. More detailed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

Base (YE Jun 2026): NZ residents n =3,164; AU residents n=2,433

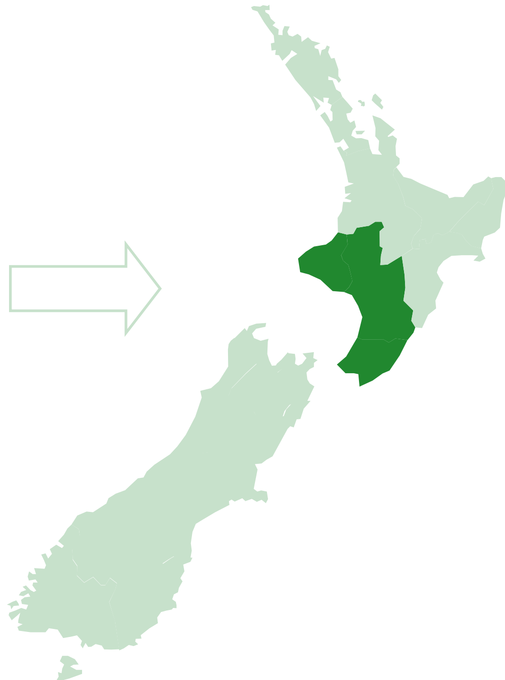
*Ireland TAR is based on data collected during Apr-Sep 25 only, from n=3,805 Ireland residents

DOMESTIC TOURISM (CONT.)

YE Jun 2025
New Zealand Domestic TAR: 58

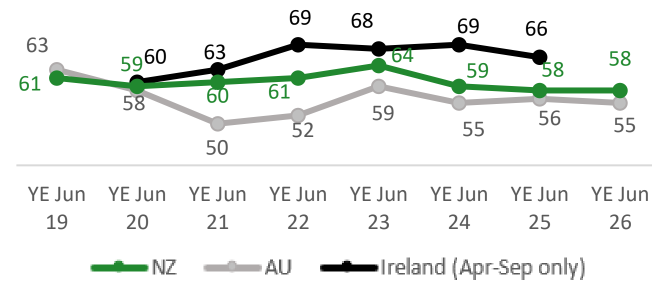


YE Jun 2026
New Zealand Domestic TAR: 58



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

Annual Domestic TAR - Trend



Region	YoY shift in domestic TAR scores
Northland	↓ 4
Auckland	↑ 3
Waikato	↓ 4
Bay of Plenty/Gisborne/Hawke's Bay	↓ 4
Taranaki/Manawatu-Wanganui	↑ 7
Wellington	↑ 2
Tasman/Nelson/Marlborough/West Coast	No change
Canterbury	↓ 1
Otago/Southland	↓ 6

Base (YE Jun 2026): NZ residents n =3,164; AU residents n=2,433
*Ireland TAR is based on data collected during Apr-Sep 25 only, from n=3,805 Ireland residents

Views on Tourism Snapshot: New Zealand Residents

Research was conducted between July 2025 and June 2026 using Angus & Associates' Views on Tourism© programme. The sample includes n=3,164 New Zealand residents aged 18+ years.

TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism

	New Zealand	Australia	Ireland
Overall TAR:	**47**	51	63 (-2)
International TAR:	**47**	49 (-1)	60 (-1)
Domestic TAR:	**58**	55 (-1)	66 (-3)

Advocacy
Approval
Acceptance
Limited Acceptance
Threatened Acceptance
Disapproval

83% of New Zealand residents have experienced benefits from tourism activity in their area, and the top 5 are…

- Opportunities for employment & income
- More local businesses opening, or being able to stay open
- Opportunities to learn more about other cultures
- Inspired them to travel domestically
- Improved services for communities

74% 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
- Damage to the natural environment
- Takes longer to get to places due to traffic and congestion
- 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 higher quality visitors

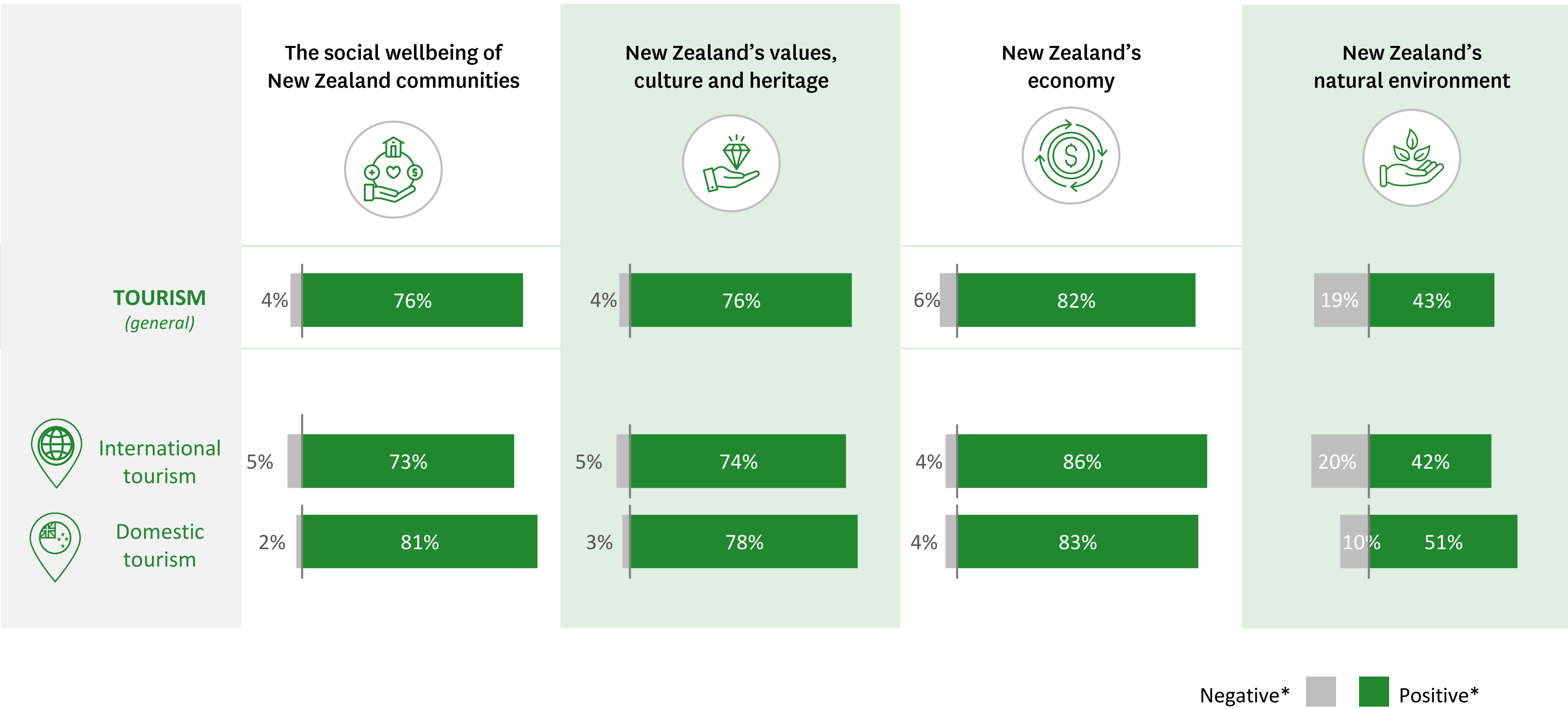
(+/-) indicates change in TAR score relative to YE Jun 2025.

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…



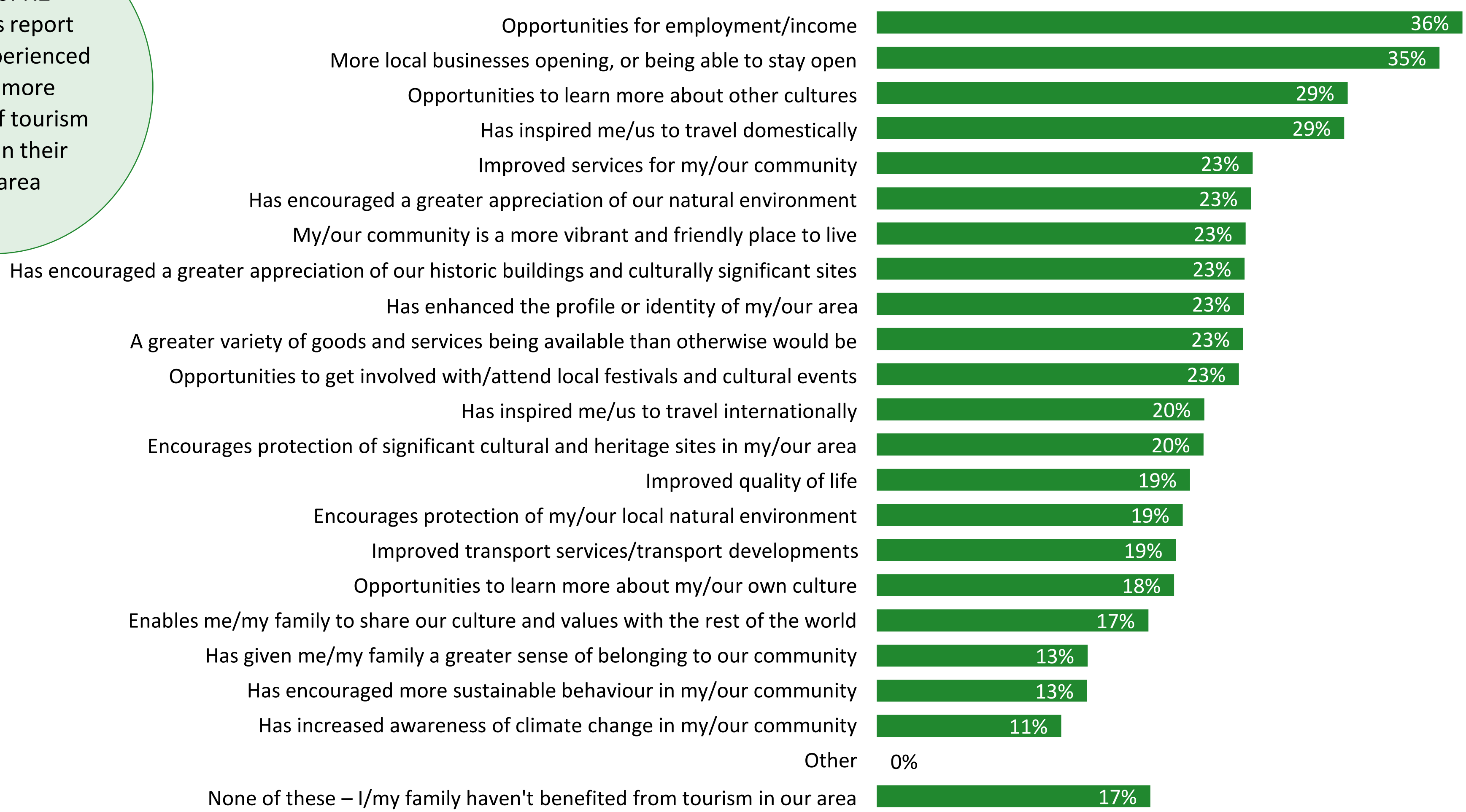
Base (YE Jun 2026): Total sample - New Zealand residents n=3,164
*Negative = Very negative + Negative; Positive = Very positive + Positive;
'Neither positive nor negative' responses are excluded

FELT BENEFITS & IMPACTS OF TOURISM ACTIVITY

BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

83% of NZ residents report having experienced one or more benefits of tourism activity in their local area

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



Base (YE Jun 2026): Total sample - New Zealand residents n=3,164
Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level

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?

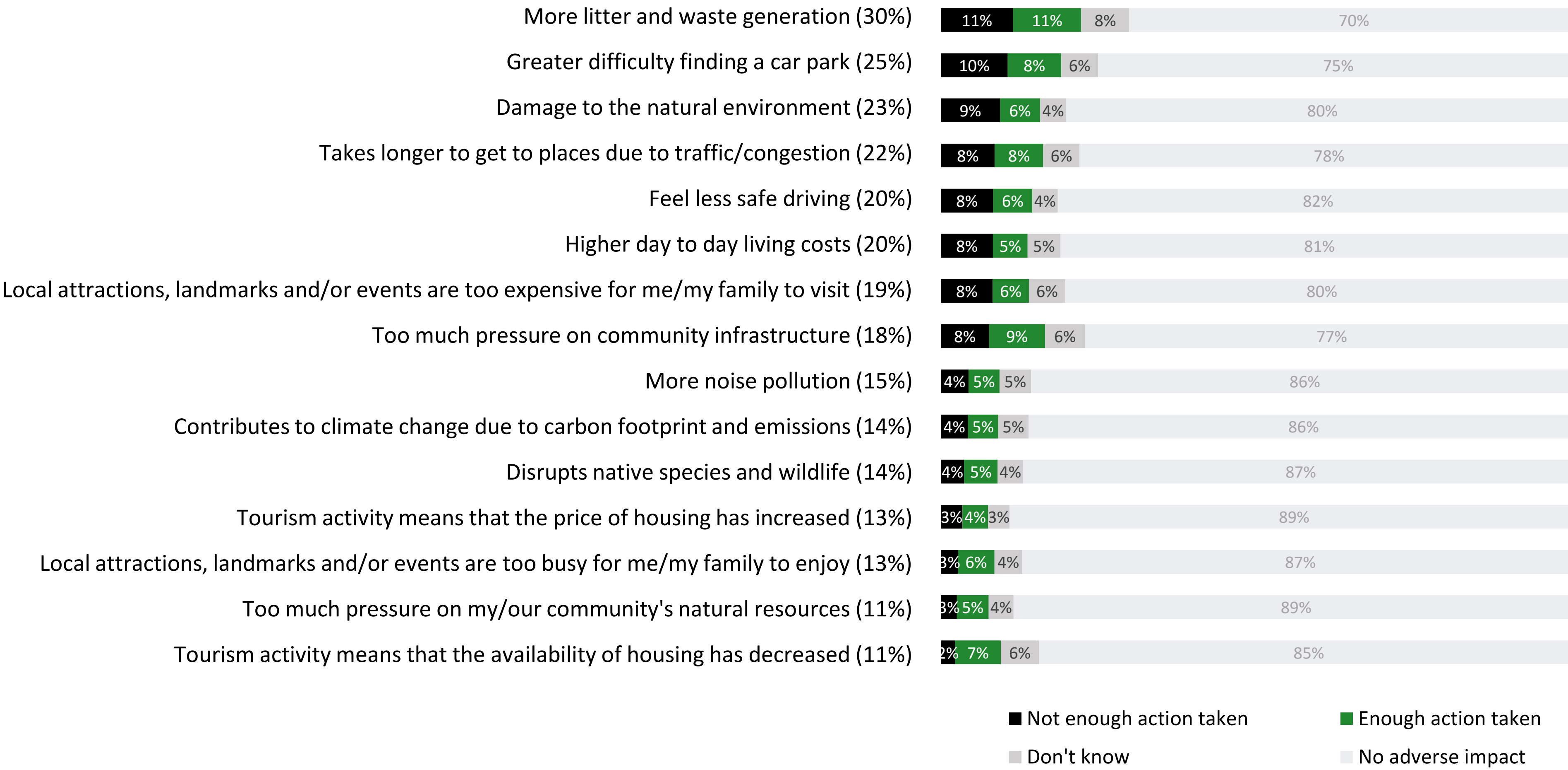
74% of NZ residents report having experienced one or more adverse impacts of tourism activity in their local area

Base (YE Jun 2026): Total sample - New Zealand residents n=3,164
Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level

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?

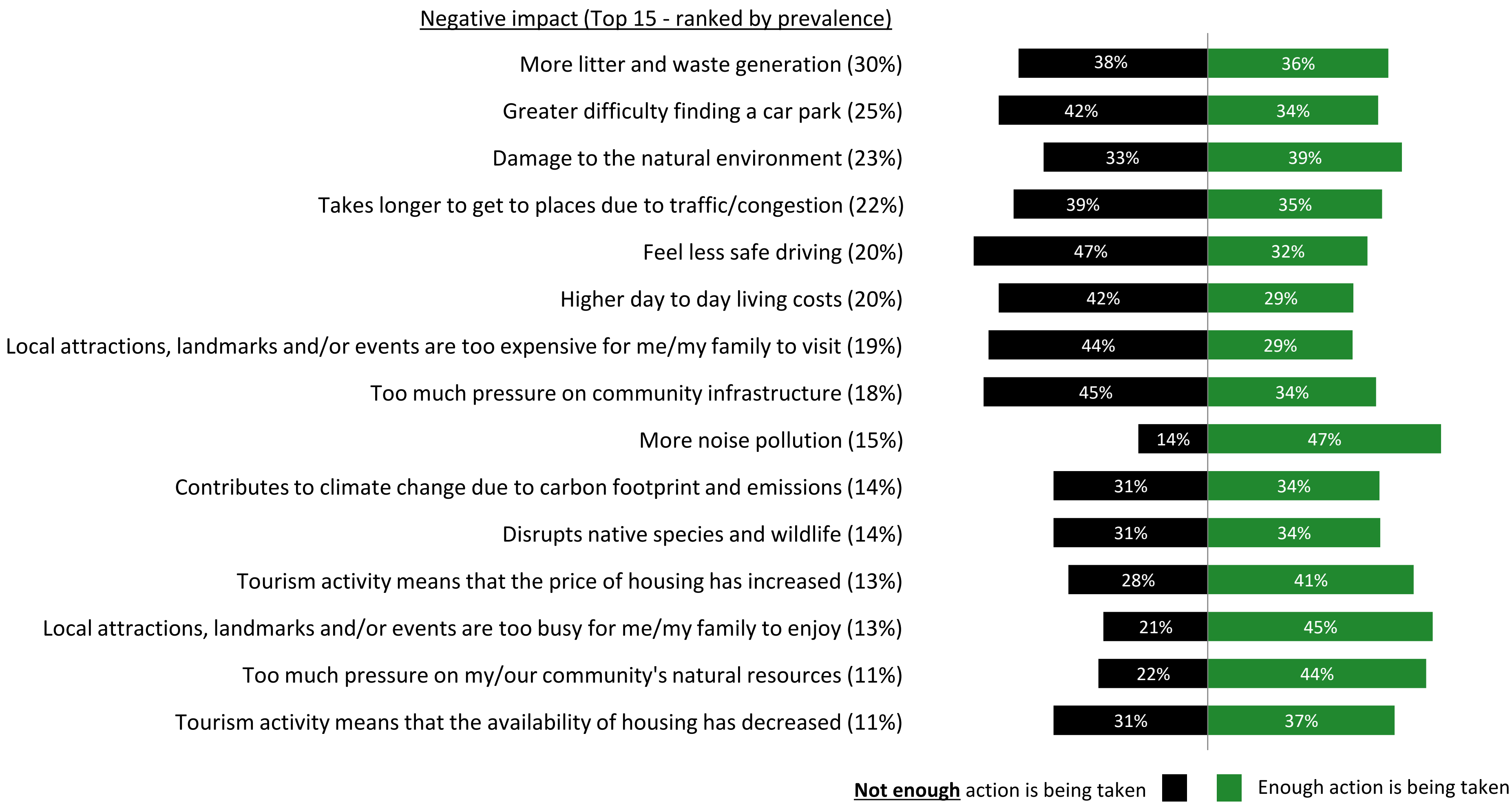
Negative impact (Top 15 - ranked by prevalence)



Base (YE Jun 2026): Total sample - New Zealand residents n=3,164

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?



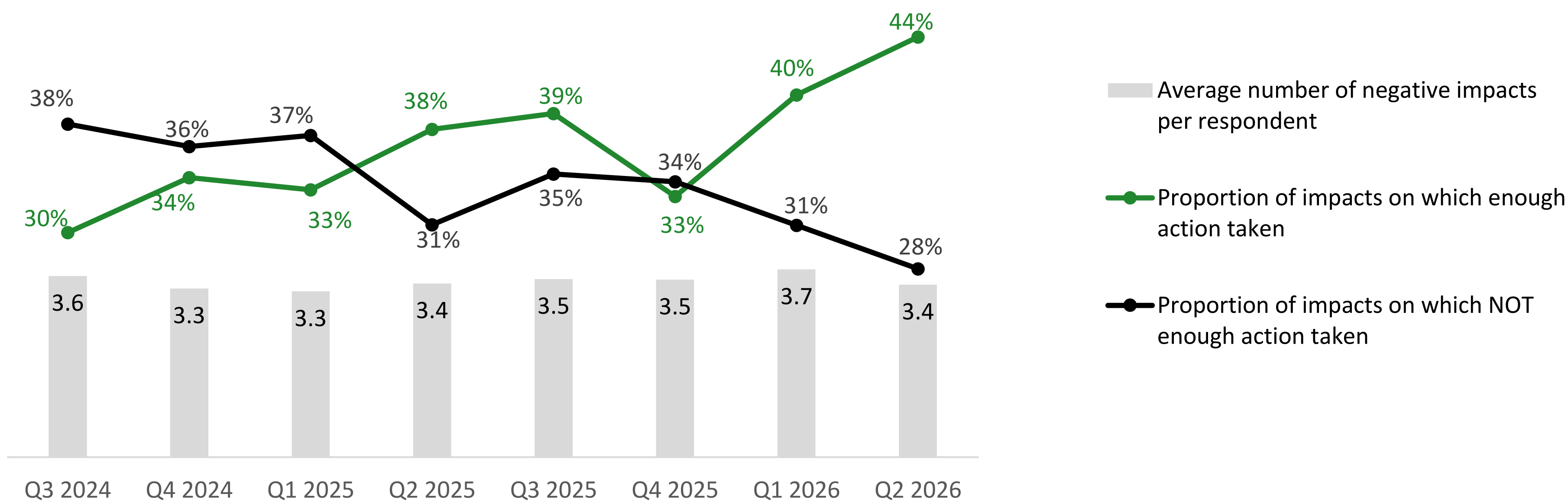
Base (YE Jun 2026): New Zealand residents negatively impacted by tourism n=2,341
'Don't know' and no impact responses excluded

ACTION TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM

As shown in the chart below, survey respondents have each identified from 3.3 to 3.7 negative impacts of tourism (on average) since July 2024.[1] This average has fluctuated slightly over the seven quarters shown, as has views on the adequacy of action being taken to address these.

The proportion of impacts identified on which respondents report that **enough action is being taken** has increased from 40% in Q1 2026 to 44% in the latest quarter, continuing an underlying upward trend seen since this question was introduced in Q3 2024. This corresponds with an underlying downward trend in the proportion of Kiwis who report that **NOT enough action** is being taken on tourism's adverse impacts.

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?



Base: Total sample - New Zealand residents: Q3 2024 (n=796), Q4 2024 (n=798), Q1 2025 (n=791), Q2 2025 (n=792), Q3 2025 (n=792), Q4 2025 (n=789), Q1 2026 (n=790), Q2 2026 (n=793)

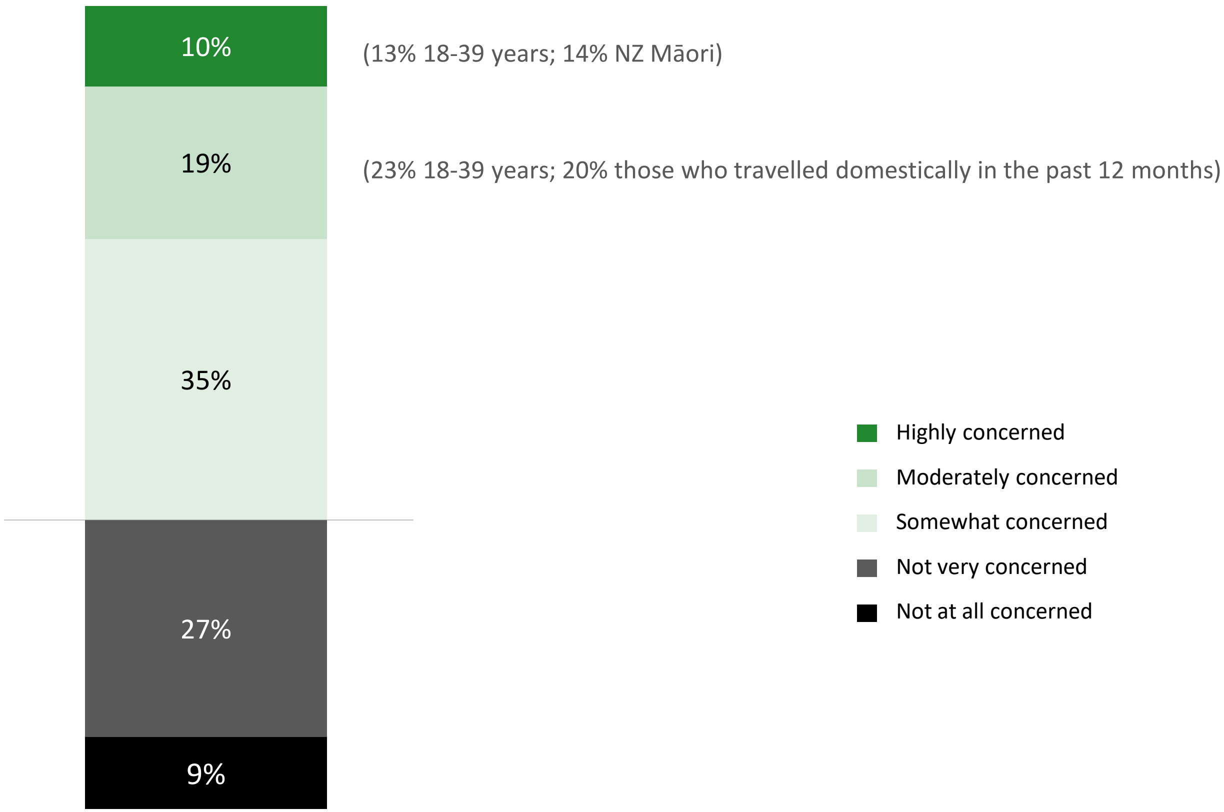
[1] The current question concerning action on negative impacts was introduced from 1 July 2024 so no prior data has been presented here.

ENVIRONMENTAL IMPACTS OF TOURISM

CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

Almost two-thirds (64%) 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?

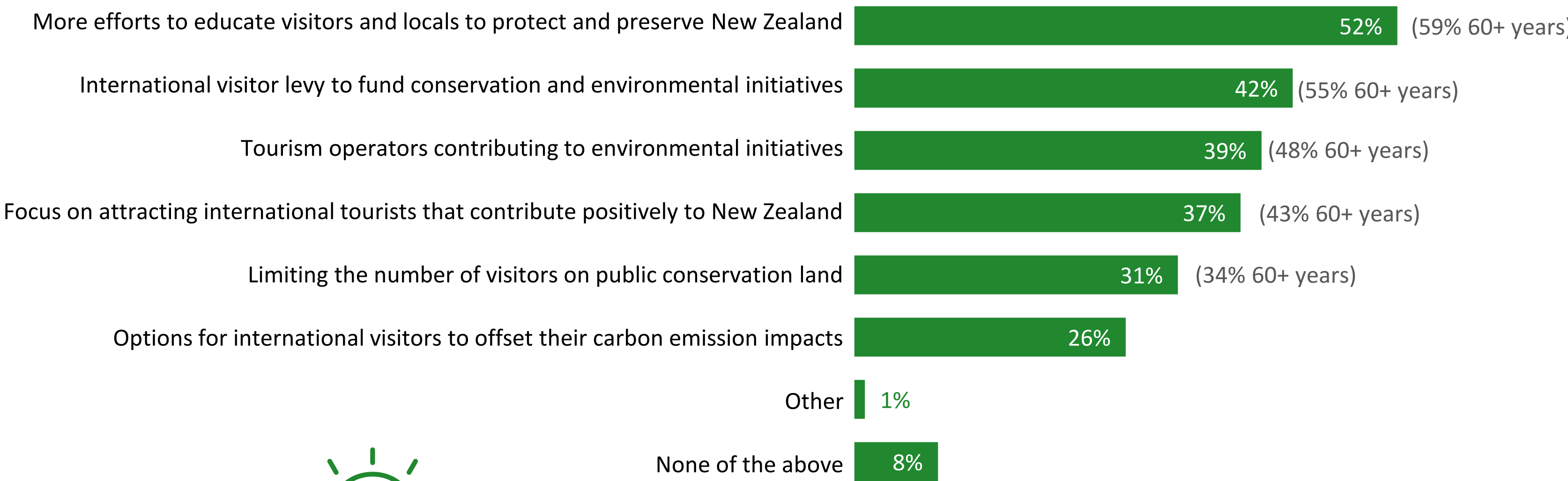


Base (YE Jun 2026): Total sample – New Zealand residents (excluding Don't know/Not sure): n=3,070

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?

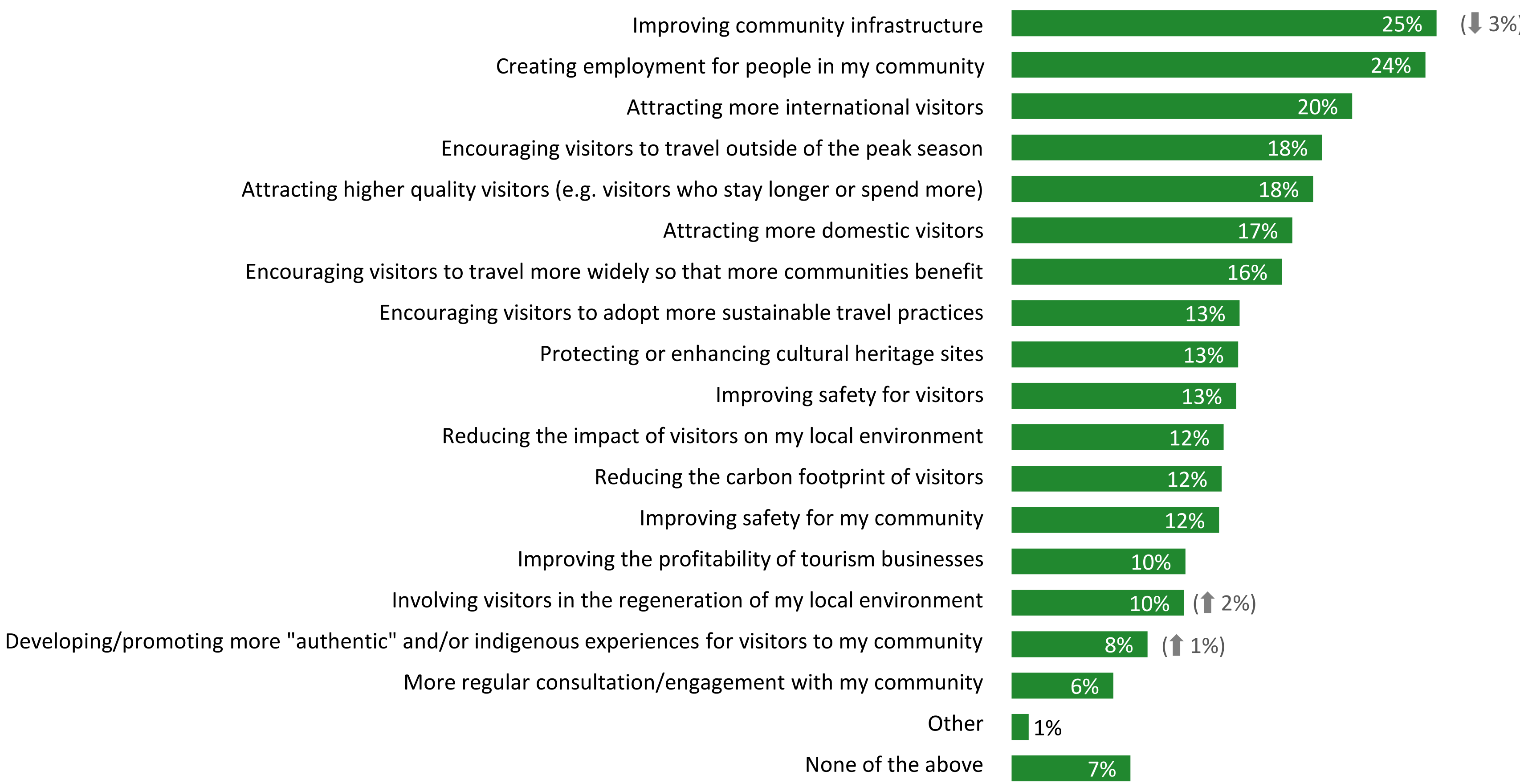


Base (YE Jun 2026): Total sample - New Zealand residents n=3,164

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 Jun 2026): Total sample - New Zealand residents n=3,164
Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level

RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

68% 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)?

Base (YE Jun 2026): Total sample - New Zealand residents n=3,164
Arrows (⬆/⬇) indicate statistically significant differences vs YE Jun 2025 at 95% confidence level

DEEP DIVE: PERCEPTIONS OF VISITOR PRESSURE

PERCEPTIONS OF VISITOR PRESSURE

The Views on Tourism survey has asked respondents "what else could be done" to mitigate tourism impacts since its launch in 2017. However, a methodology update on 1 July 2024 changed the preceding question regarding specific negative impacts. Consequently, verbatim responses can only be reliably aggregated for the past two years.

This quarter's deep dive analyses the specific suggestions made by survey respondents over these past two years, alongside their responses to the broader question: "*What other comments do you have, if any, on tourism in your community or in New Zealand?*". By examining this verbatim feedback, the analysis captures public perceptions of visitor volume and pressure at popular locations, revealing four core sub-themes:

1. ***Transport & Infrastructure Strain*** (21%): Concerns regarding traffic congestion, parking shortages, road maintenance, public toilet availability, waste management, and the overall strain on civic services.
2. ***Local Displacement & Affordability*** (17%): Issues surrounding the high cost of attractions for local residents, feelings of being "pushed out" of community facilities, increased ratepayer burdens, rising housing costs, and growing calls for resident discount programmes.
3. ***Destination Crowding & Management*** (16%): Frustrations with overcrowding at tourist hotspots, sudden surges from cruise ship arrivals, and peak summer queues, leading to demands for visitor caps, bed taxes, or entry levies.
4. ***Environmental & Resource Degradation*** (9%): Observations of natural habitat disruption, widespread littering, negative impacts on wildlife, water overuse, and ongoing issues related to freedom camping.

"Tourists should have the same restrictions to places like Mt Eden, as local residents. They should walk up, not ride up in heavy buses which damage the environment."

"The roads in Northland are TERRIBLE, not suitable for purpose and 2 major highway SH1 parts (Mangamukus and Bryderwyns) have been closed for so long tourism has declined enormously and businesses are struggling."

"Waitangi is too expensive, even for locals, as are many other major local tourist attractions."

"Roadworks at peak times why? Park and ride facility at The Mount particularly? We and my friends and family have avoided The Mount this Christmas and New Year and now all public holidays as the congestion is a major problem."

"Port Marlborough has become greedy and no longer sufficient free or metered parks for public, creating chaos on main road."

"We have many cruise ships coming into the Port of Tauranga. The vast majority hop on a bus to Rotorua or Hobbiton. It would be great to find a way to encourage them to stay and spend some money here."

"Encourage more visitors to travel New Zealand on coaches driven by professional, licensed drivers. This is about to implemented (hopefully) on the Milford Sound road which is not a drive to be undertaken by the fainthearted!"

"Reduce numbers by requiring people to book. limit access by making access available by licensed tour boats or vehicles only. See Cathedral Cove."

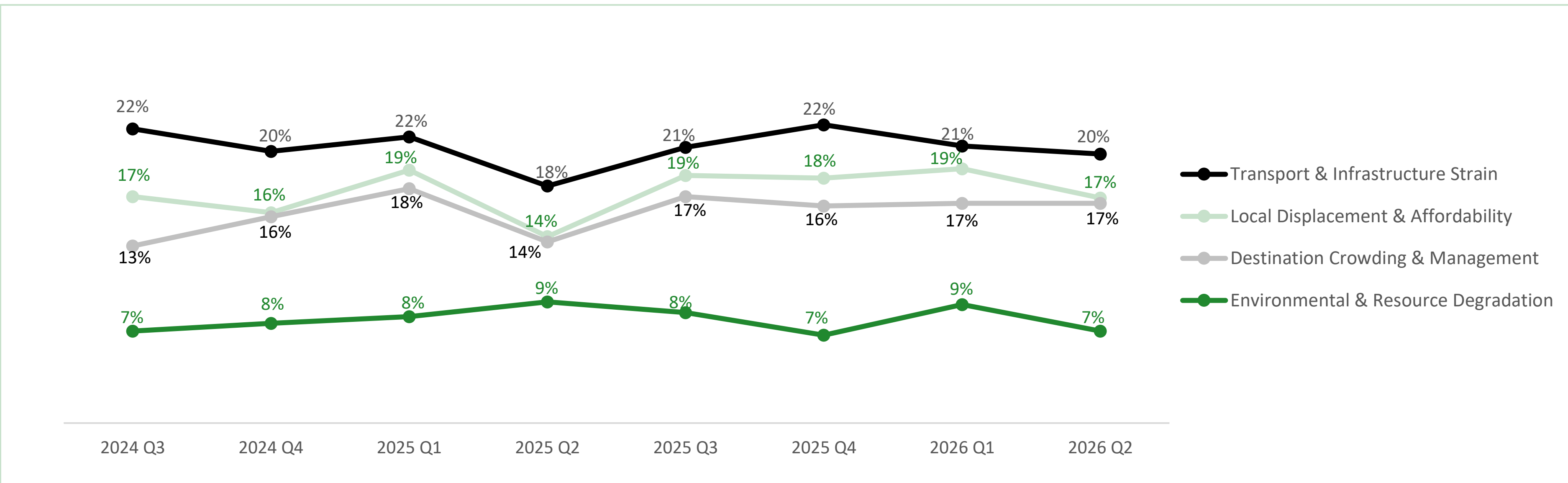
"Our air spaces continue to expand with noise, whilst this is to be expected being a busy tourist area and one that is limited by the landscape, it would be nice to give locals a 'rest' from noise e.g. noisy Milford Sound planes, (this comment is me being selfish here!) but for 20 years these planes fly over our house ever day as the weather allows . would be nice for flight path to be altered maybe monthly so it not so continuous..."

PERCEPTIONS OF VISITOR PRESSURE (cont.)

Key Longitudinal Findings (Q3 2024 – Q2 2026)

As illustrated in the following chart, tracking these themes over the past eight quarters reveals some seasonal fluctuations, but an overall consistency over time:

- ***Infrastructure Strain***: Transport and infrastructure deficits have remained the most prominent issue across all eight quarters to date.
- ***Local Displacement***: Concerns regarding local displacement and affordability have peaked repeatedly at 19% over multiple quarters, demonstrating that these concerns are not confined to the peak summer visitor season (Q1).
- ***Destination Crowding:*** While comments relating to crowding and destination management reached their highest point during the summer peak of early 2025 (Q1), the frequency of this feedback has remained relatively stable since July 2025, with no obvious seasonal peaks or troughs.
- ***Environmental and Resource Degradation***: This theme has consistently registered as the lowest overarching concern, remaining relatively flat within a narrow 7-9% band throughout the entire two-year period.



SAMPLE PROFILE

SAMPLE PROFILE

	Weighted	*Unweighted*
Gender		
Male	49%	48%
Female	51%	51%
Gender diverse / Prefer not to say	<1%	1%
Age		
18 – 29 years	20%	22%
30 – 39 years	19%	17%
40 – 49 years	16%	17%
50 – 59 years	16%	17%
60 – 69 years	14%	13%
70+ years	15%	14%
Travel in Past 12 Months		
Travelled around New Zealand	73%	73%
Travelled to Australia	24%	24%
Travelled overseas (outside of Australasia)	28%	28%
Have not travelled	15%	15%
Base: Total sample	n=3,164	

	Weighted	*Unweighted*
Region		
Northland	4%	4%
Auckland	33%	32%
Waikato	10%	9%
Bay of Plenty	7%	7%
Gisborne	1%	1%
Hawke's Bay	3%	4%
Taranaki	2%	3%
Manawatū-Whanganui	5%	5%
Wellington & Wairarapa	11%	10%
Tasman	1%	1%
Nelson	1%	1%
Marlborough	1%	1%
West Coast	1%	1%
Canterbury	13%	12%
Otago	5%	8%
Southland	2%	2%
Base: Total sample	n=3,164	

	Weighted	*Unweighted*
Ethnicity		
New Zealand European	69%	69%
Other European	6%	6%
New Zealand Māori	12%	12%
Cook Island Māori	1%	1%
Indian	4%	4%
Chinese	4%	4%
Pacific Islander	3%	3%
Other	12%	13%
Household Composition		
My husband, wife or partner	55%	54%
My mother and/or father	7%	7%
My child/children aged under 5	11%	10%
My child/children aged 5 - 14	18%	17%
My child/children aged 15+	13%	13%
Other family/relatives	8%	8%
Other person(s)	6%	7%
None of the above - I live alone	18%	18%
Prefer not to say	1%	1%
Base: Total sample	n=3,164	

angus
& ASSOCIATES