

A serene, misty seascape with a small boat on the horizon. The water is calm, and the sky is a soft, hazy green. The overall mood is peaceful and expansive.

VIEWS ON TOURISM[©] PROGRAMME

VIEWS ON TOURISM: NEW ZEALAND

YEAR ENDING DECEMBER 2025

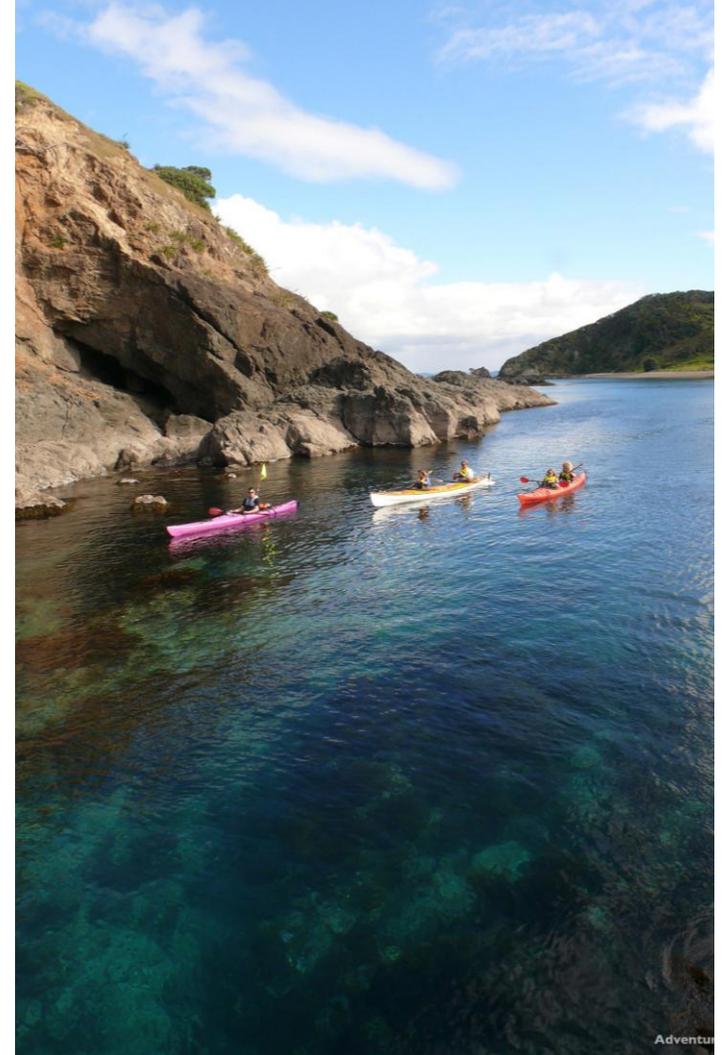
INTRODUCTION

This report updates findings of the Views on Tourism[®] research to include the year ending December 2025.¹ 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).



METHODOLOGY

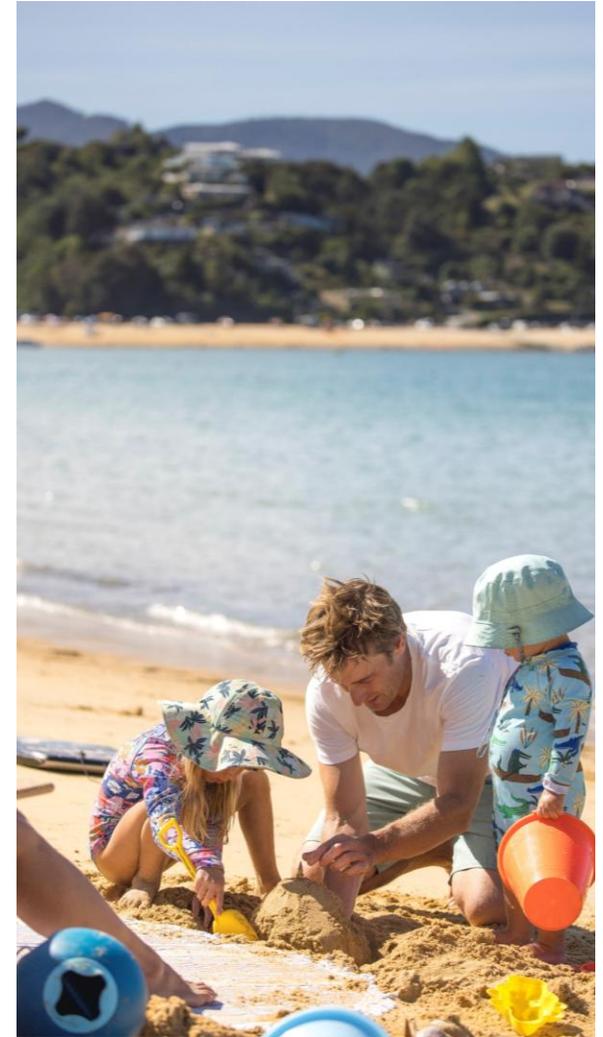
The research is undertaken with a sample of at least n=250 New Zealand residents each month, with the survey sample being representative of the New Zealand population (aged 18 years+) by age, gender and region.

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

The latest Views on Tourism® findings indicate that support for tourism remains very strong, with 95% of New Zealanders agreeing that **tourism** is good for New Zealand, and a stable 94% for each, when international and domestic tourism are considered separately. The proportion of New Zealanders agreeing that **tourism is good for their region** (and specifically, **international tourism**) has increased in the latest year (up +2%).

Tourism is thought to have an overwhelmingly positive impact on New Zealand's economy, and a positive impact on the social wellbeing of communities and New Zealand's values, culture and heritage. Opinion on tourism's environmental impact is more divided, although more New Zealanders currently consider tourism to have positive than negative impacts in this respect.

Tourism benefits & adverse impacts

More than 80% of New Zealanders surveyed in the year to December 2025 (82%) reported that they had **personally benefited** from tourism activity in their local area. This was consistent with the year prior. As in previous years, the most commonly-reported benefits were **economic** (opportunities for employment/income created by tourism - 36%, and support for local businesses - 35%).

In the same period, 73% of New Zealand survey respondents said they had been **negatively impacted** by tourism activity in their local area, which again aligned with the year prior. The top three areas in which respondents reported negative impacts were also consistent from year to year – more litter and waste generation (30%), greater difficulty finding car parking (25%), and damage to the natural environment (23%).

Since July 2024, survey respondents have each identified between 3.3 and 3.6 adverse impacts of tourism (on average). The proportion of impacts identified on which respondents reported that **enough action is being taken** dropped from 39% in Q3 2025 to 33% in the latest quarter. At the same time, a significant proportion of impacts remain 'unresolved', with respondents reporting that **NOT enough action is being taken** on 34% of the negative impacts identified in the latest quarter.

Tourism Approval Rating (TAR) scores

For the year ending December 2025, the New Zealand resident TAR score for **tourism overall** sits at the level of 'acceptance' (48). There has been a small increase in both international and domestic TAR scores in the year to December 2025, each up one point to 48 and 59, respectively.

Deep dive analysis: social license & visitor volume

This quarter's deep-dive analysis began as an investigation of the relationship between social license and seasonality but revealed little variation in sentiment across the seasons. Given this, the focus shifted to understanding how social license correlates with visitor volume specifically.

The analysis shows a positive correlation between international guest nights (as recorded in the Accommodation Data Programme) and the International TAR Score (as an indicator of social license), when viewed at a national level over the last five years. This finding is also reflected in Australian and Irish Views on Tourism® data. However, beyond this, there is no clear relationship apparent between visitor volume and social license, when considered at a regional level. As noted in the deep dive section, this aligns with other research on social carrying capacity, in which we see that visitor numbers alone are not a reliable indicator of social license. Refer to pages 48-49 for further detail.



**OVERALL
SENTIMENT
TOWARDS TOURISM
ACTIVITY**

OVERALL TOURISM

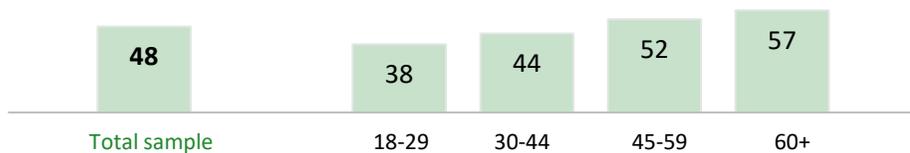
The vast majority of New Zealand residents continue to agree that tourism is good for New Zealand (95%) and/or for their region (90%). In the year to December 2025, those **disagreeing** that tourism is good for **New Zealand** have decreased slightly while those agreeing that tourism is good for **their region** have increased.

At the same time, more than one third (38%) believe that visitors put too much pressure on New Zealand, and three in ten (31%) believe that visitors put too much pressure on their region.

For the year ending December 2025, the TAR score for tourism overall, which considers the positive and negative impacts of tourism, is at the level of 'acceptance' for New Zealand residents (at 48).

By age, younger New Zealand residents view tourism less favourably than those in the older age groups. The tourism TAR score is also lower than it is for the total sample amongst NZ Māori (41), Indian (42) and Chinese (46).

Tourism TAR Score, By Age



Tourism is good for New Zealand



Tourism is good for my region



Visitors put too much pressure on New Zealand



Visitors put too much pressure on my region



Disagree* Agree*

Base (YE Dec 2025): Total sample - New Zealand residents n=3,164

Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 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

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



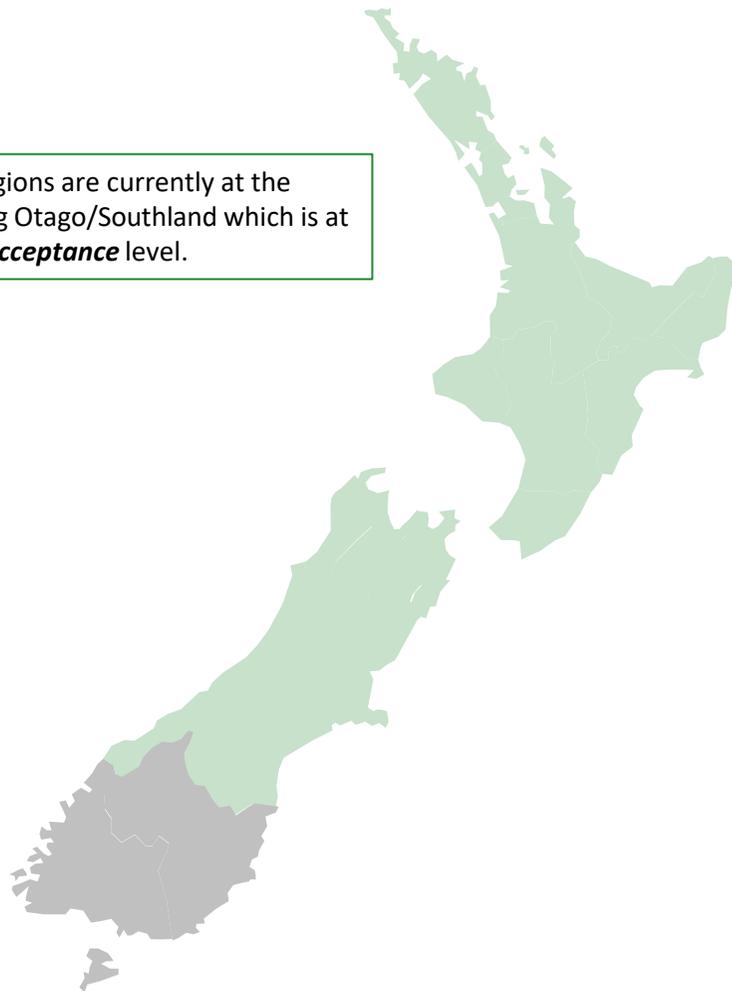
Base: Total sample - New Zealand residents: YE Dec 24 (n=3,195), YE Dec 25 (n=3,164)

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

OVERALL TOURISM (CONT.)

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	120
Auckland	50	1,001
Waikato	51	291
Bay of Plenty/Gisborne/Hawke's Bay	47	388
Taranaki/Manawatu-Wanganui	52	227
Wellington	48	326
Tasman/Nelson/Marlborough/West Coast	49	120
Canterbury	48	389
Otago/Southland	35	302

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.

OVERALL TOURISM (CONT.)

YE Dec 2024

New Zealand Overall TAR: 48



YE Dec 2025

New Zealand Overall TAR: 48



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

Annual Overall TAR - Trend



YE Dec 18 YE Dec 19 YE Dec 20 YE Dec 21 YE Dec 22 YE Dec 23 YE Dec 24 YE Dec 25

— NZ — AU — Ireland (Apr-Sep only)

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

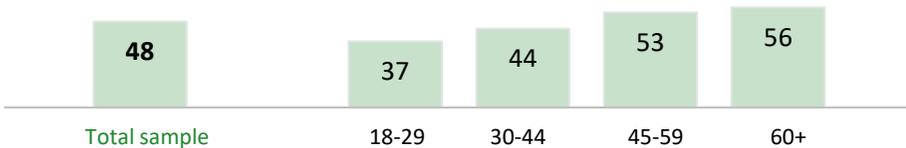
INTERNATIONAL TOURISM

The vast majority of New Zealand residents also agree that **international tourism** is good for New Zealand (94%) and/or for their region (90%). As with 'tourism overall', the proportion who agree that international tourism is good for their **region** has increased in the latest year (+2%).

Reflecting the TAR score for 'tourism overall', the international TAR score is currently at the level of 'acceptance' amongst New Zealand residents (at 48).

By age, younger residents view international tourism less favourably than older residents and, as with the overall TAR score, the international TAR score is also lower than average amongst NZ Māori (40) and Indian (44).

International TAR Score, By Age



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 (YE Dec 2025): Total sample - New Zealand residents n=3,164

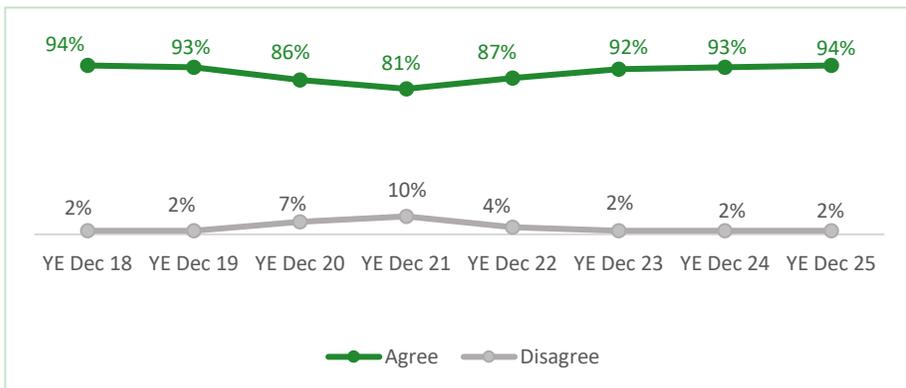
Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 at 95% confidence level

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

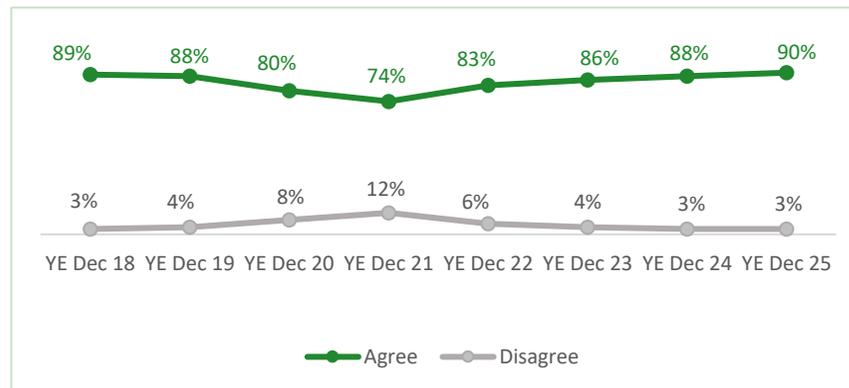
'Neither agree nor disagree' and 'Don't know' responses excluded

INTERNATIONAL TOURISM (CONT.)

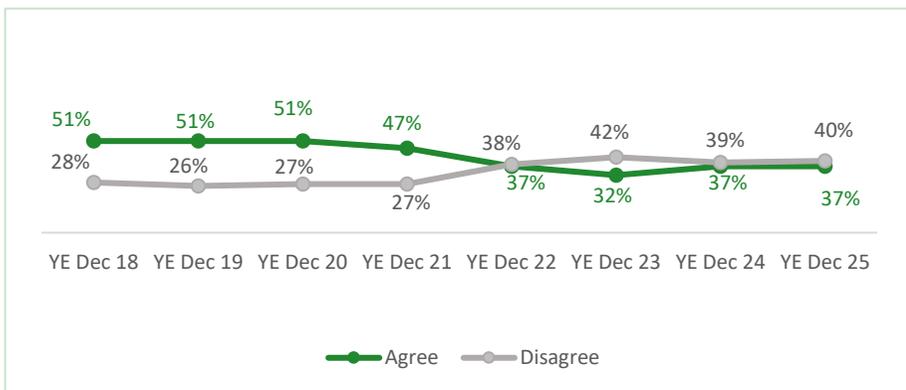
International tourism is good for New Zealand



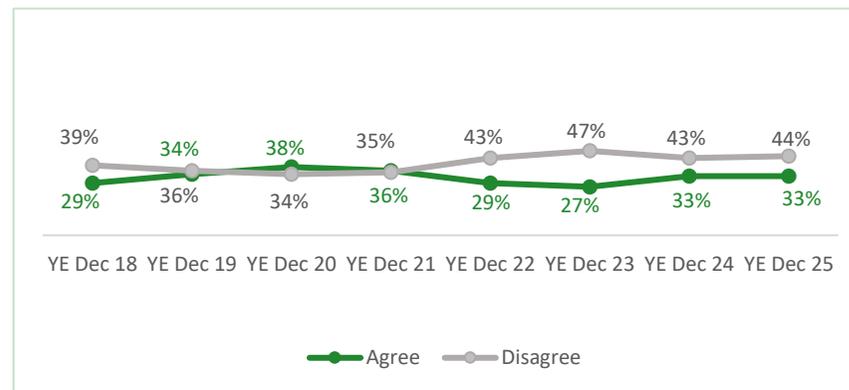
International tourism is good for my region



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 Dec 18 (n=2,509); YE Dec 19 (n=2,601); YE Dec 20 (n=3,034); YE Dec 21 (n=3,075); YE Dec 22 (n=3,192); YE Dec 23 (n=3,173); YE Dec 24 (n=3,195); YE Dec 25 (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.)

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



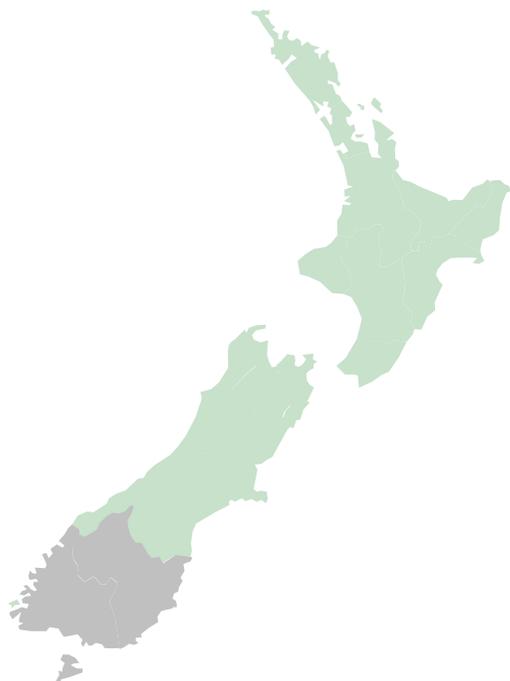
Region	International TAR	N=
Northland	48	120
Auckland	50	1,001
Waikato	52	291
Bay of Plenty/Gisborne/Hawke's Bay	48	388
Taranaki/Manawatu-Wanganui	52	227
Wellington	49	326
Tasman/Nelson/Marlborough/West Coast	48	120
Canterbury	48	389
Otago/Southland	35	302

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

INTERNATIONAL TOURISM (CONT.)

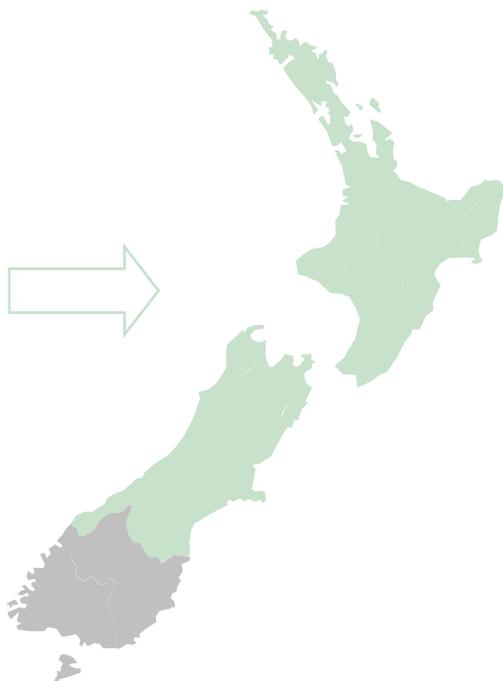
YE Dec 2024

New Zealand International TAR: 47



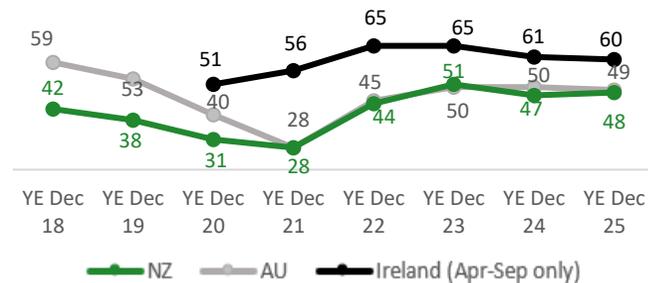
YE Dec 2025

New Zealand International TAR: 48



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

Annual International TAR - Trend



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

DOMESTIC TOURISM

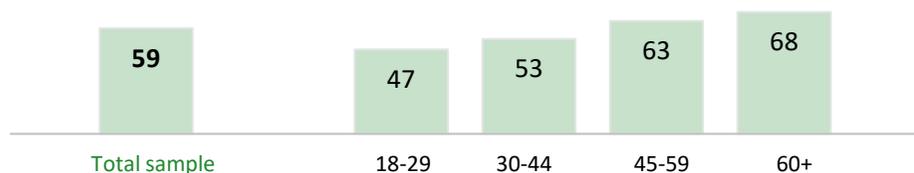
As with international tourism and tourism overall, the great majority of New Zealand residents agree that domestic tourism is good for New Zealand (94%) and/or for their region (92%). A quarter (26%) believe that domestic visitors put too much pressure on New Zealand, and a similar proportion (25%) believe that domestic visitors put too much pressure on their region. These results are unchanged year-on-year to December 2025.

New Zealand’s domestic TAR score, which takes into account both positive and negative impacts of domestic tourism, is currently at 59 (which equates to ‘acceptance’).

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

The domestic TAR score is lower than it is for the total sample amongst NZ Māori (50), Indian (50) and Chinese (53).

Domestic TAR Score, By Age



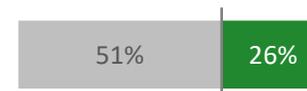
Domestic tourism is good for New Zealand



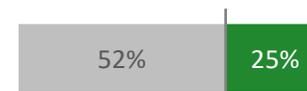
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



Domestic visitors put too much pressure on my region



Disagree* Agree*

Base (YE Dec 2025): Total sample - New Zealand residents n=3,164

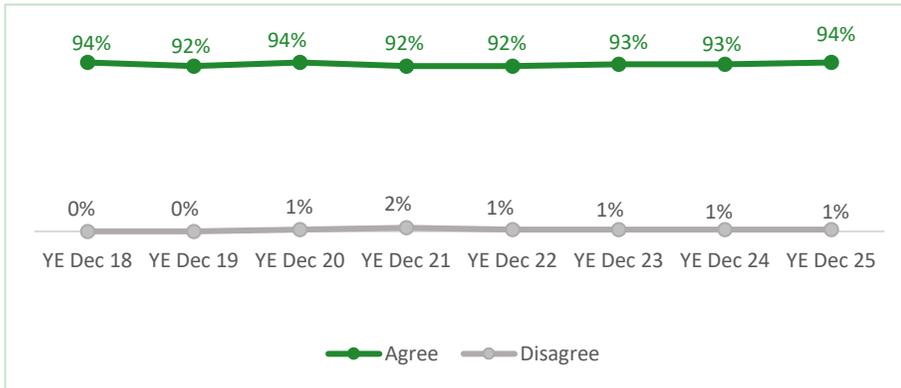
Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 at 95% confidence level

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

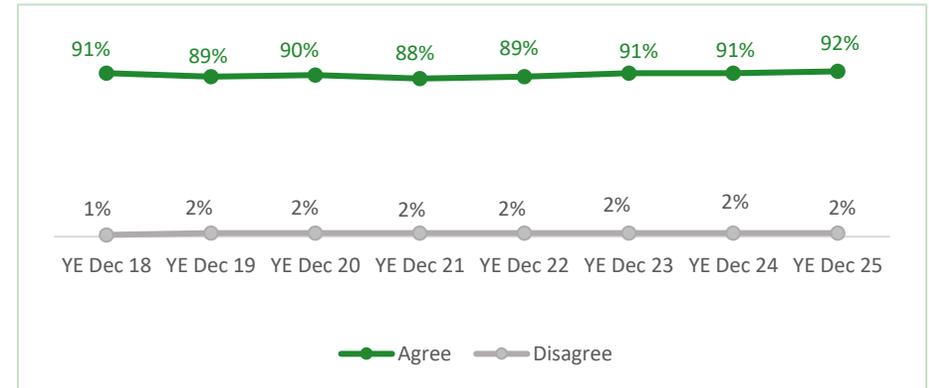
‘Neither agree nor disagree’ and ‘Don’t know’ responses excluded

DOMESTIC TOURISM (CONT.)

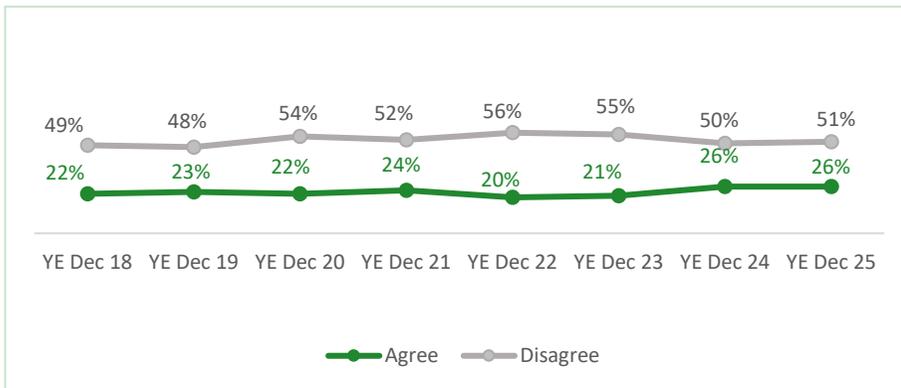
Domestic tourism is good for New Zealand



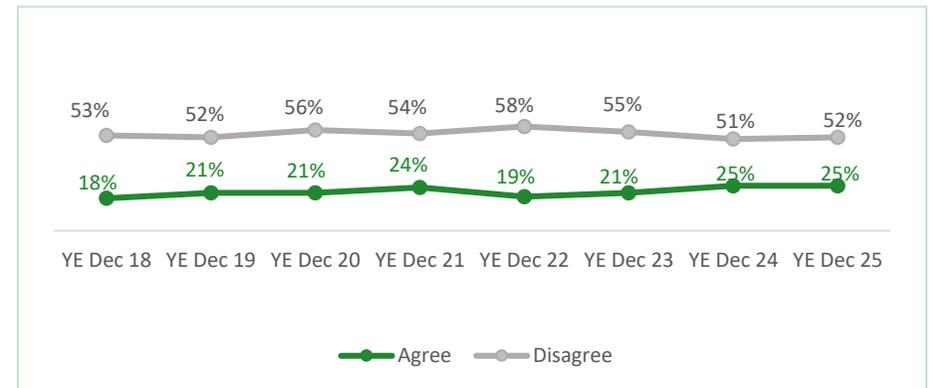
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



Domestic visitors put too much pressure on my region



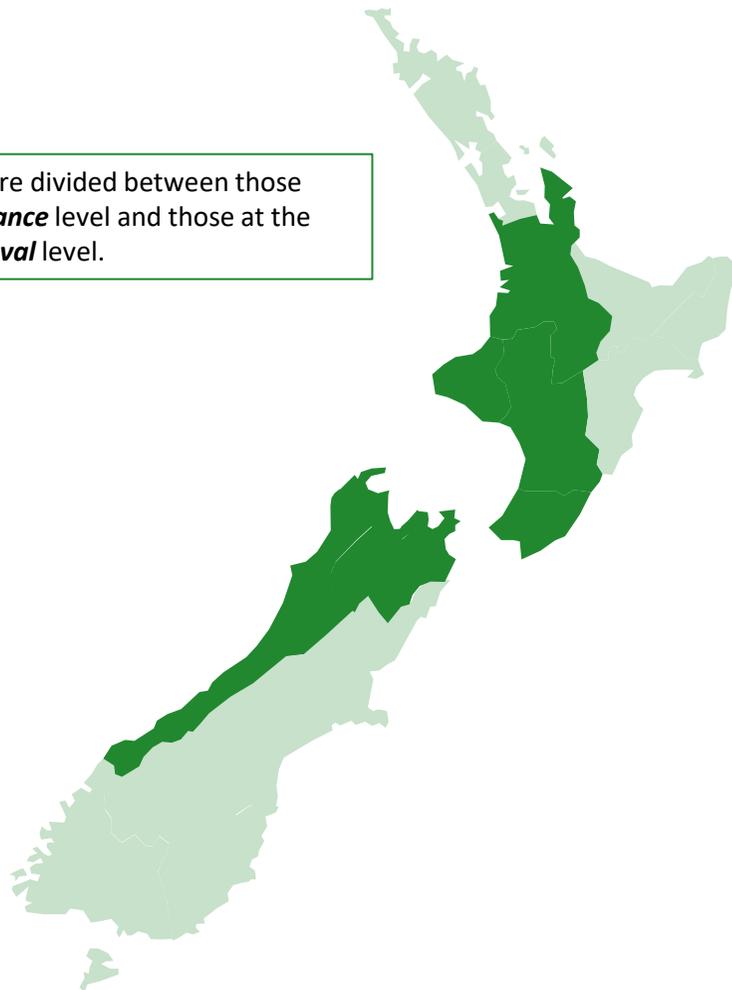
Base: Total sample - New Zealand residents: YE Dec 18 (n=2,509); YE Dec 19 (n=2,601); YE Dec 20 (n=3,034); YE Dec 21 (n=3,075); YE Dec 22 (n=3,192); YE Dec 23 (n=3,173); YE Dec 24 (n=3,195); YE Dec 25 (n=3,164)

*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 regions are divided between those currently at the **acceptance** level and those at the **approval** level.

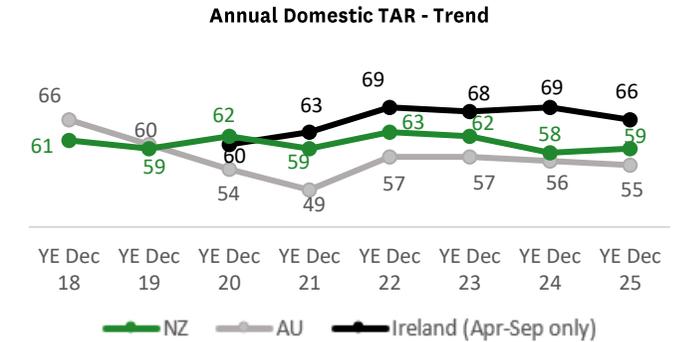
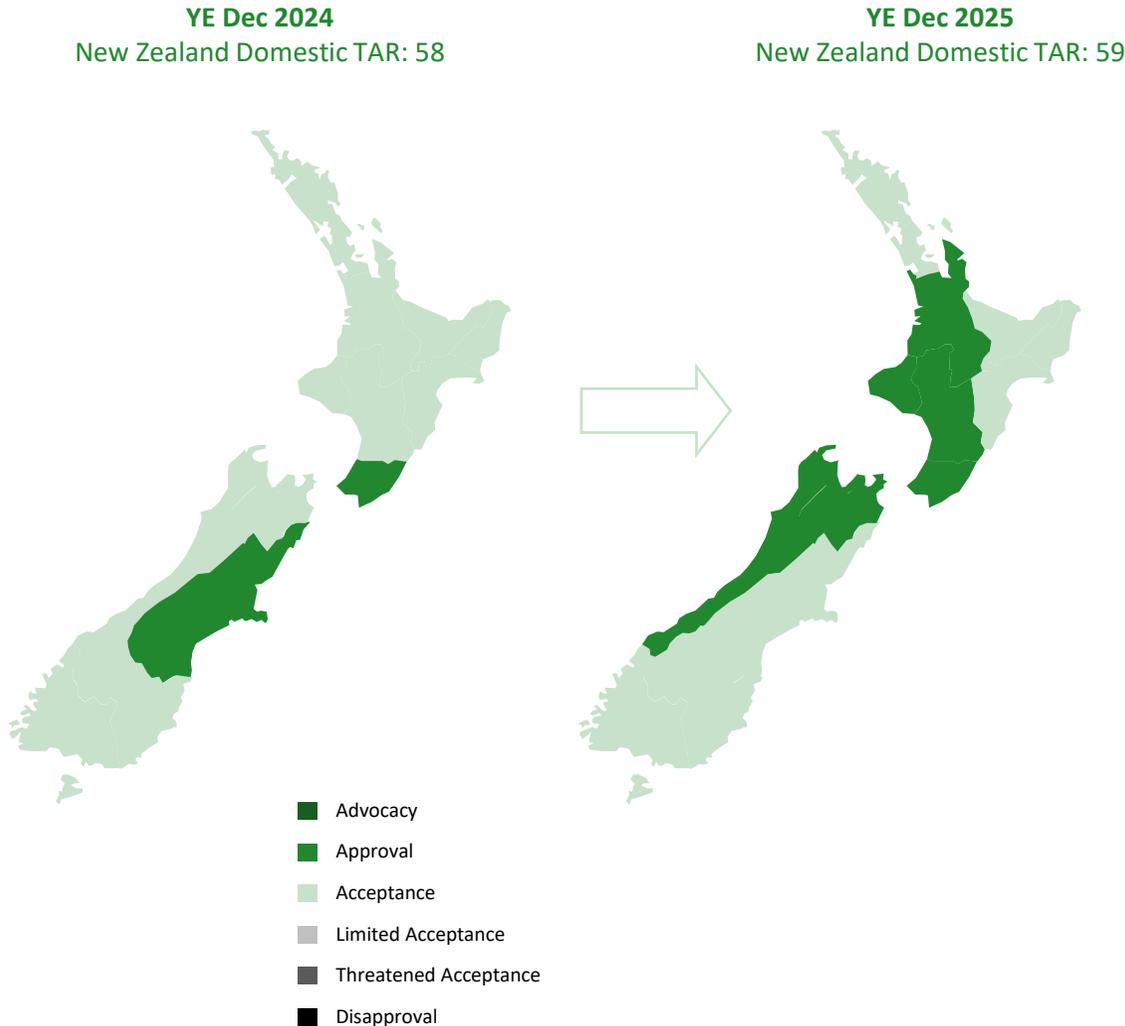
- Advocacy
- Approval
- Acceptance
- Limited Acceptance
- Threatened Acceptance
- Disapproval



Region	Domestic TAR	N=
Northland	57	120
Auckland	58	1,001
Waikato	61	291
Bay of Plenty/Gisborne/Hawke's Bay	58	388
Taranaki/Manawatu-Wanganui	62	227
Wellington	63	326
Tasman/Nelson/Marlborough/West Coast	60	120
Canterbury	59	389
Otago/Southland	54	302

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

DOMESTIC TOURISM (CONT.)



Region	YoY shift in domestic TAR scores
Northland	↑ 2
Auckland	↑ 1
Waikato	↑ 5
Bay of Plenty/Gisborne/Hawke's Bay	↑ 1
Taranaki/Manawatu-Wanganui	↑ 6
Wellington	No change
Tasman/Nelson/Marlborough/West Coast	↑ 3
Canterbury	↓ 4
Otago/Southland	↓ 3

Views on Tourism Snapshot: New Zealand Residents

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

TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism



Overall TAR:

International TAR:

Domestic TAR:

Overall TAR:			International TAR:			Domestic TAR:		
New Zealand	Australia	Ireland	New Zealand	Australia	Ireland	New Zealand	Australia	Ireland
48 <small>(No change)</small>	52 <small>(No change)</small>	63 <small>(-2)</small>	48 <small>(+1)</small>	49 <small>(-1)</small>	60 <small>(-1)</small>	59 <small>(+1)</small>	55 <small>(-1)</small>	66 <small>(-3)</small>

82% 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
- Greater variety of goods and services being available than otherwise would be

73% of New Zealand residents have experienced **adverse impacts** from tourism activity in their area, and the top 5 are...

- More litter and waste generation
- Greater difficulty finding a car park
- 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 more domestic visitors

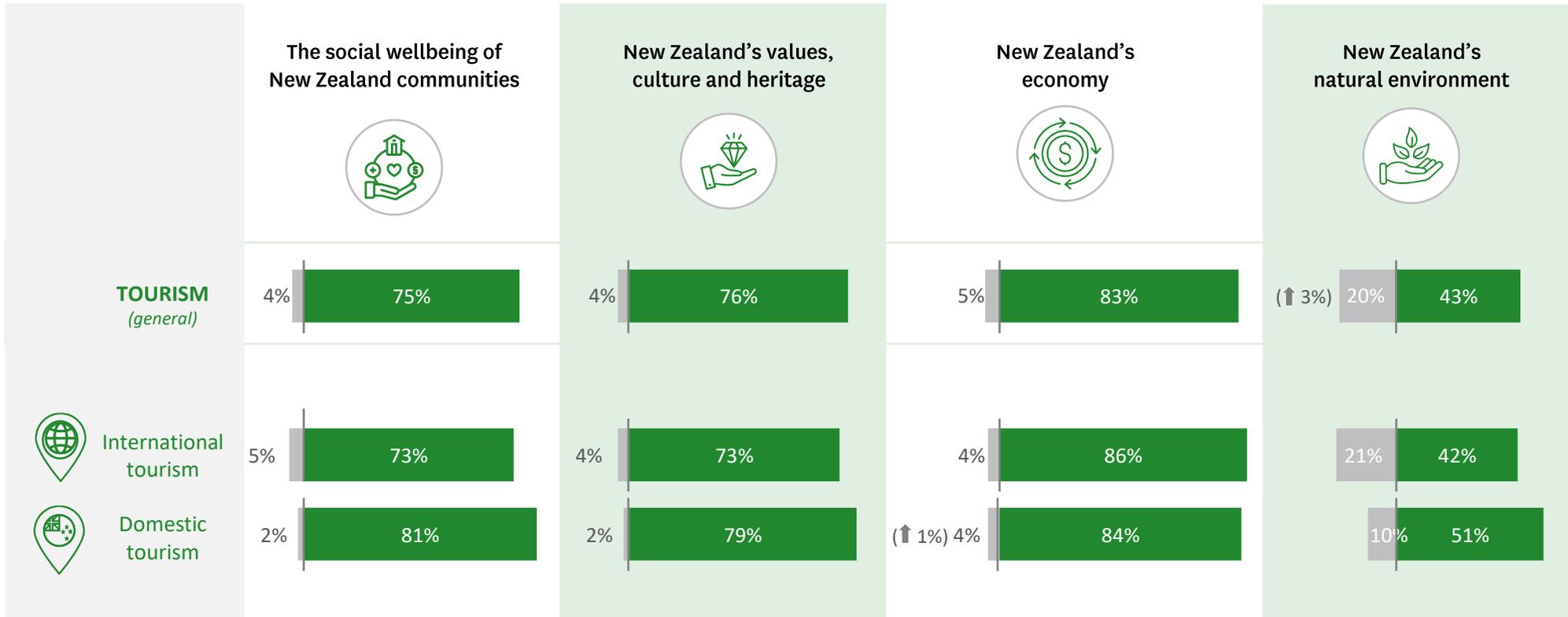


**IMPACTS OF
TOURISM BASED ON
THE FOUR CAPITALS**

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. Those who believe that tourism has a **negative** impact on the natural environment have increased in the latest year.

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



Negative* Positive*

Base (YE Dec 2025): Total sample - New Zealand residents n=3,164

*Negative = Very negative + Negative; Positive = Very positive + Positive;

'Neither positive nor negative' responses excluded

Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 at 95% confidence level



**FELT BENEFITS &
IMPACTS OF
TOURISM ACTIVITY**

BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

82% 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?



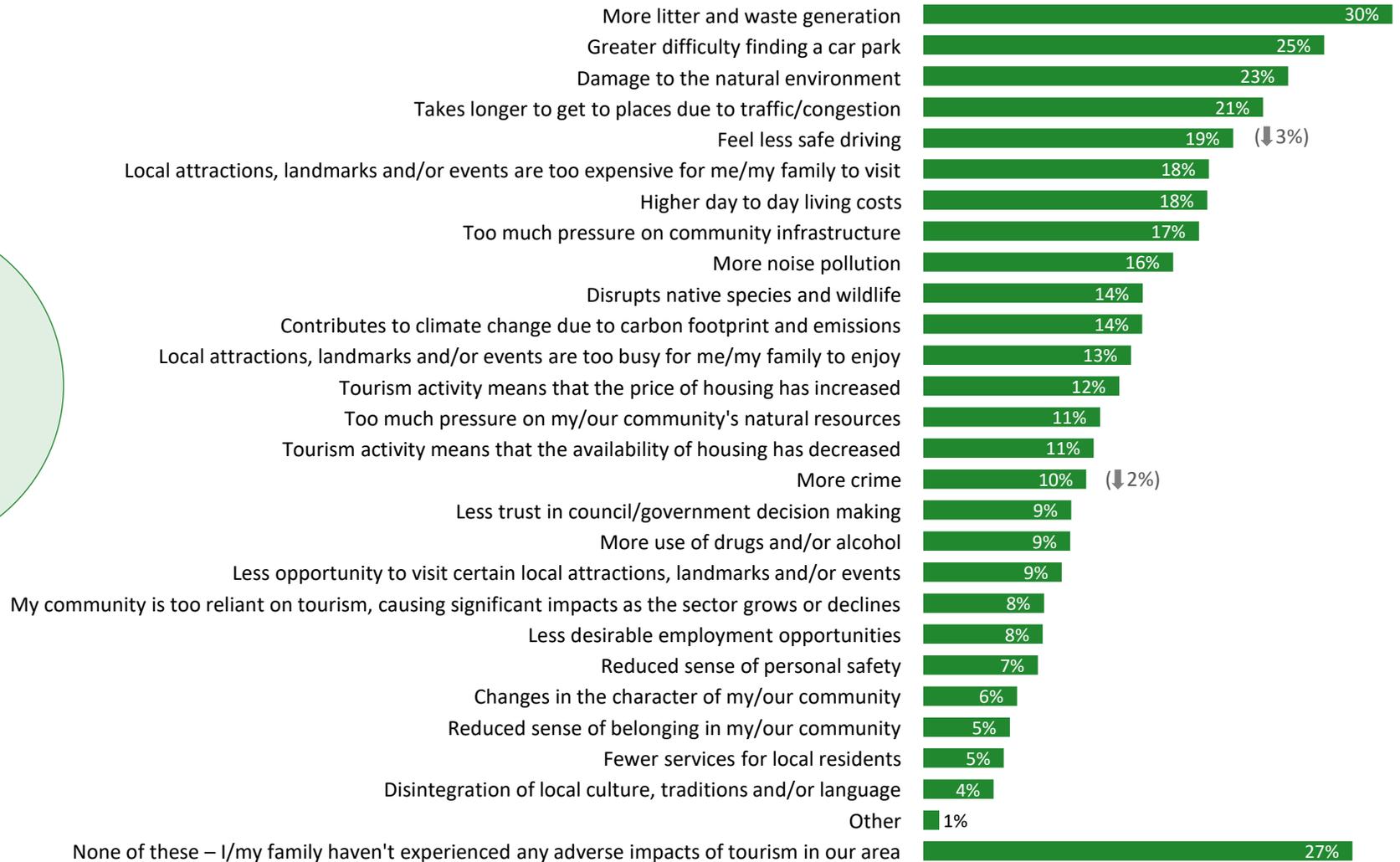
Base (YE Dec 2025): Total sample - New Zealand residents n=3,164

Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 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?

73% of NZ residents report having experienced **one or more adverse impacts** of tourism activity in their local area



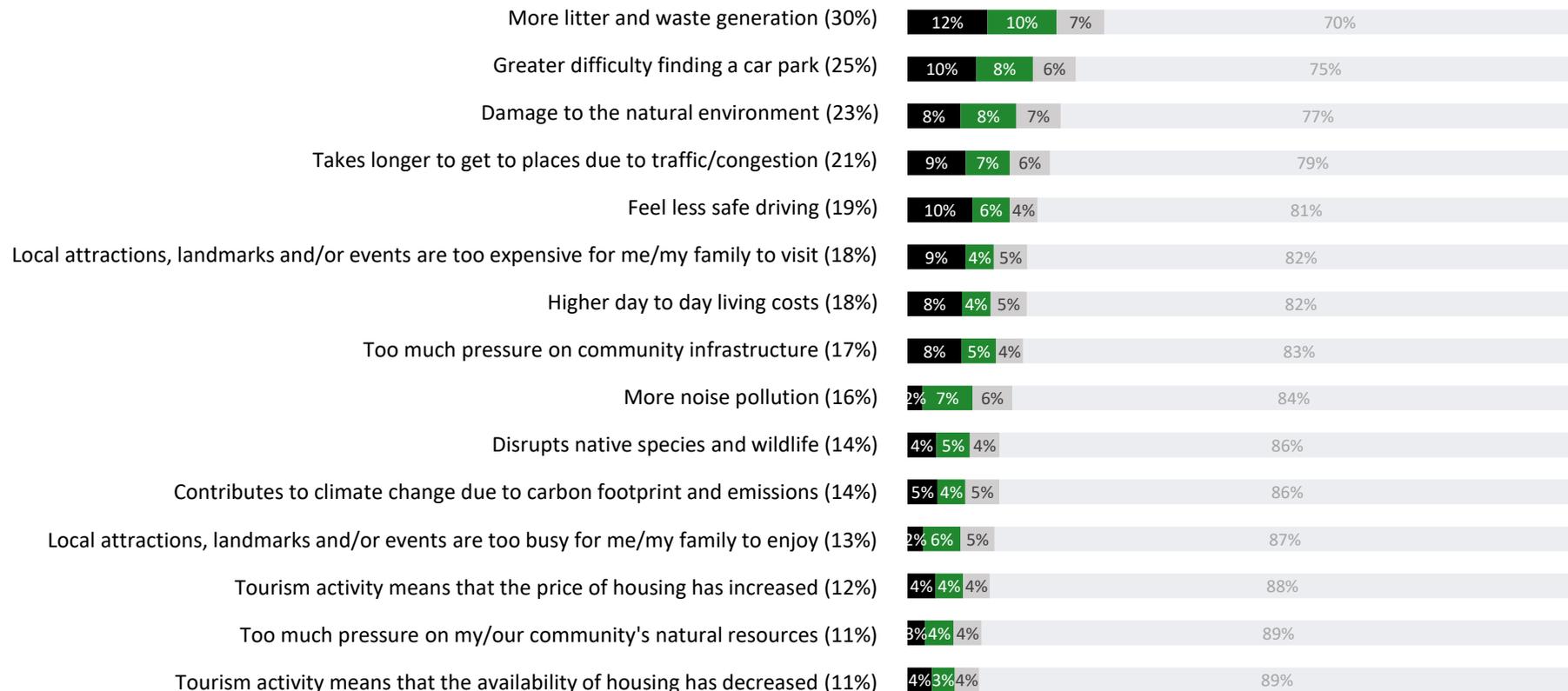
Base (YE Dec 2025): Total sample - New Zealand residents n=3,164

Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 at 95% confidence level 23

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)



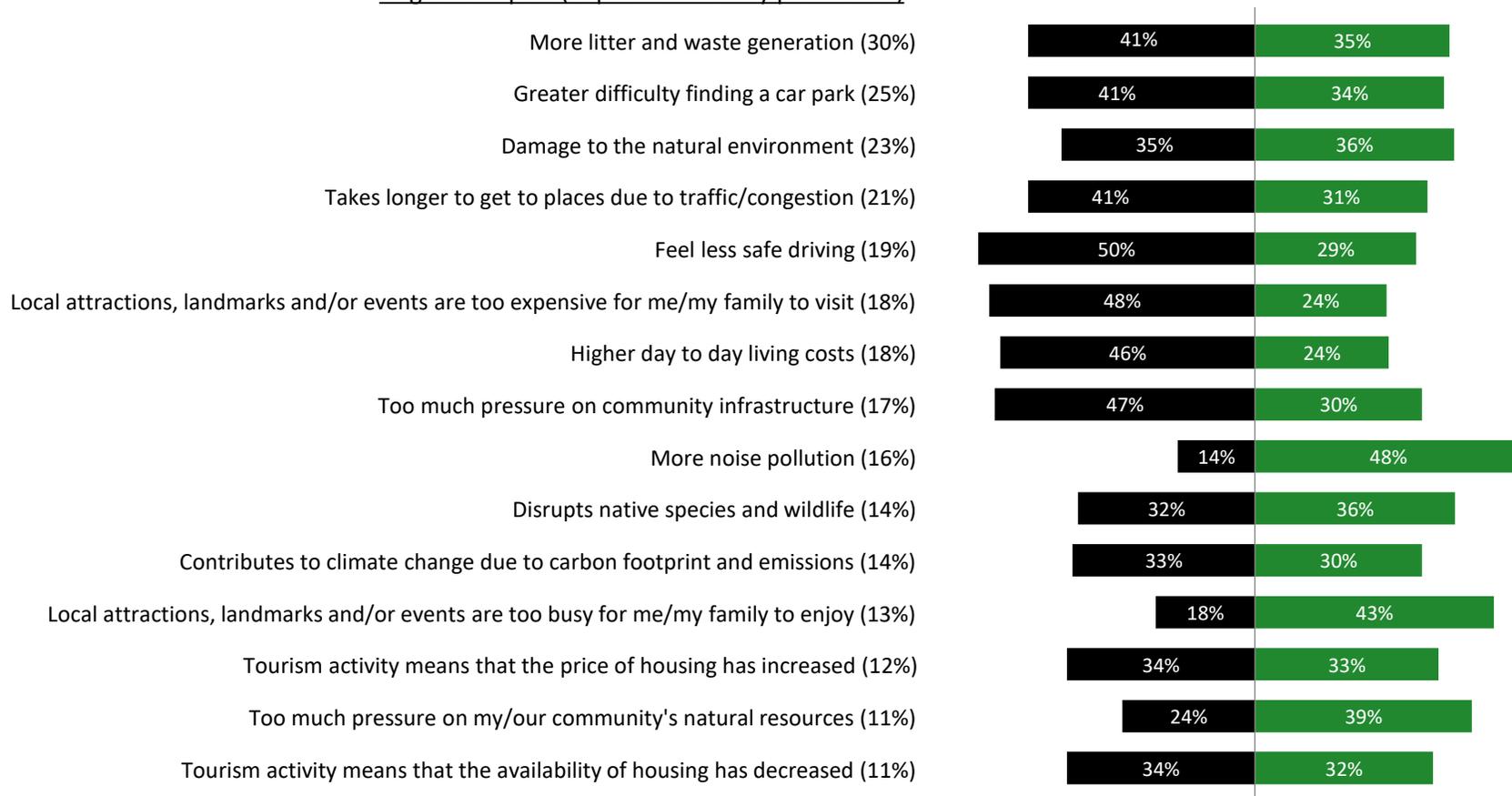
Not enough action taken
 Enough action taken
 Don't know
 No adverse impact

Base (YE Dec 2025): 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?

Negative impact (Top 15 - ranked by prevalence)



Not enough action is being taken ■ **Enough** action is being taken

Base (YE Dec 2025): New Zealand residents negatively impacted by tourism n=2,310
'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 3.3 to 3.6 negative impacts of tourism (on average) since July 2024.¹ This average has fluctuated slightly over the six 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 decreased from 39% in Q3 2025 to 33% in the latest quarter. At the same time, a significant proportion of impacts remain ‘unresolved’, with respondents reporting that NOT enough action is being taken on 34% of the negative impacts identified in the latest quarter.



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)

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

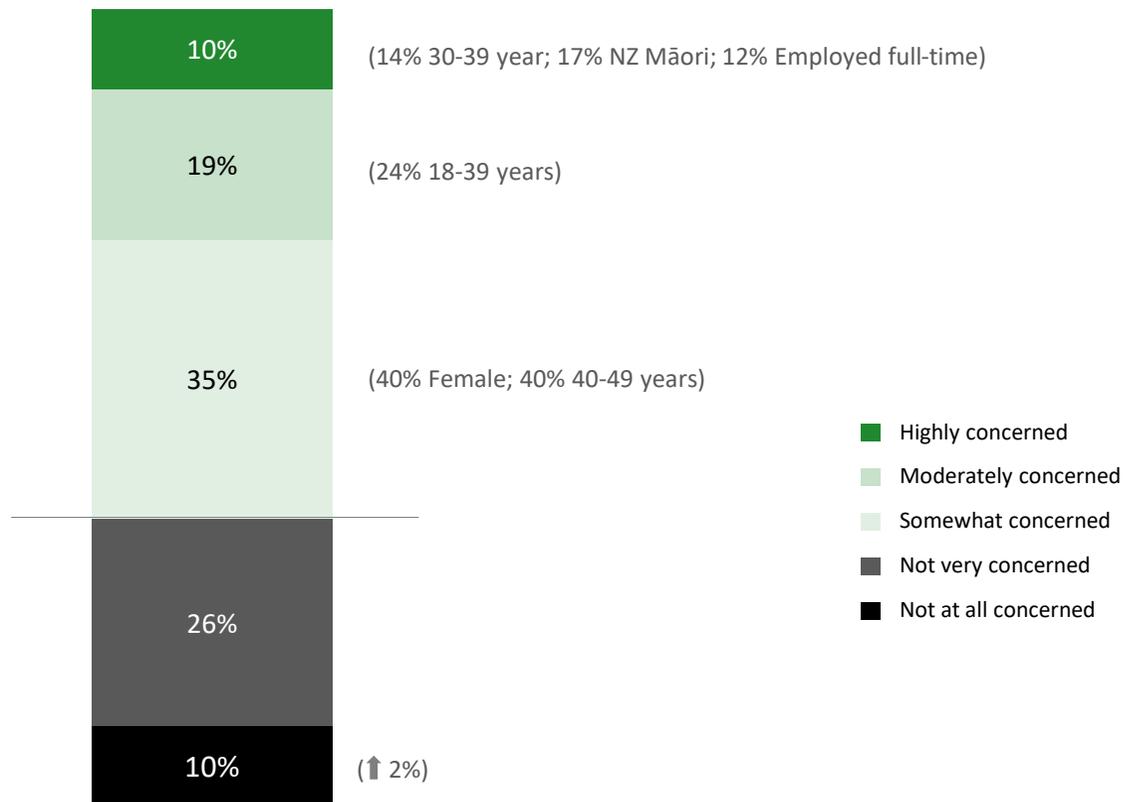


**ENVIRONMENTAL
IMPACTS OF
TOURISM**

CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

Almost two-thirds of New Zealand residents are at least 'somewhat concerned' about the impact tourism could be having on the natural environment. One in ten are 'highly concerned', with this sentiment being most common amongst Māori and those in the 30-39 age group.

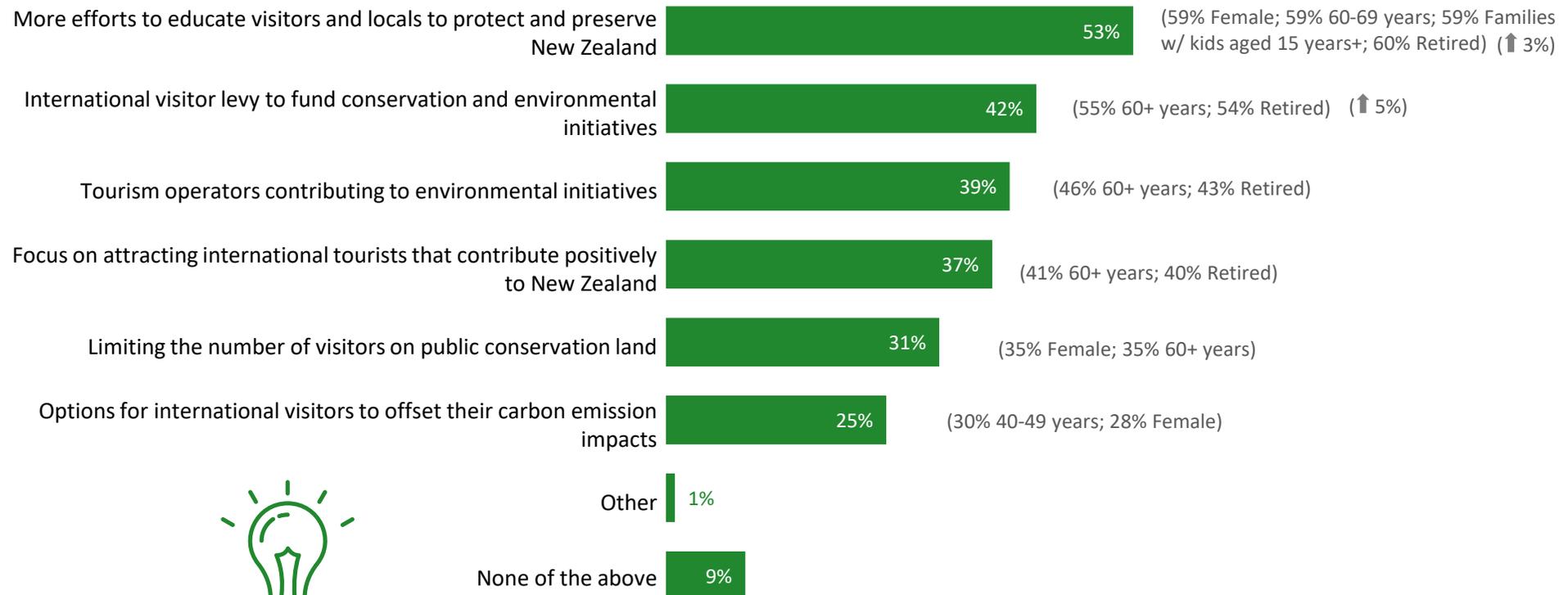
How concerned are you with any impact tourism could be having on New Zealand's natural environment?

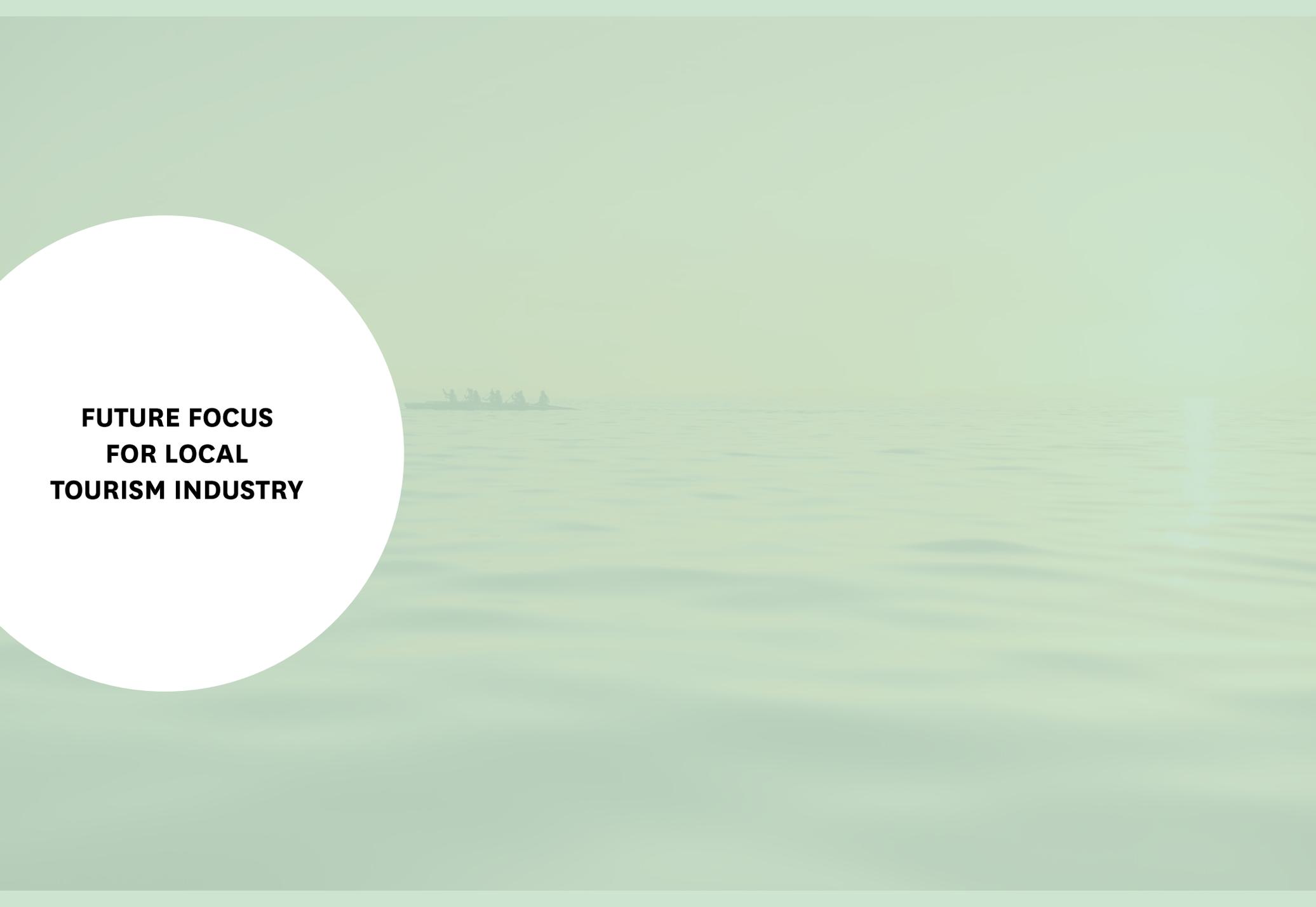


MEASURES TO MITIGATE ENVIRONMENTAL IMPACTS

More than half of New Zealanders surveyed would like to see a greater education effort in place to protect New Zealand’s environment. Support for an/the international visitor levy (IVL) to fund conservation and environmental initiatives has increased significantly in the latest year.

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





**FUTURE FOCUS
FOR LOCAL
TOURISM INDUSTRY**

FUTURE FOCUS FOR TOURISM INDUSTRY

The desired areas of future focus have been relatively consistent over time. The proportion of residents indicating that they would like to see a greater focus on attracting more international visitors has increased in the latest year.

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



Base (YE Dec 2025): Total sample - New Zealand residents n=3,164

Arrows (↑/↓) indicate statistically significant differences vs YE Dec 2024 at 95% confidence level

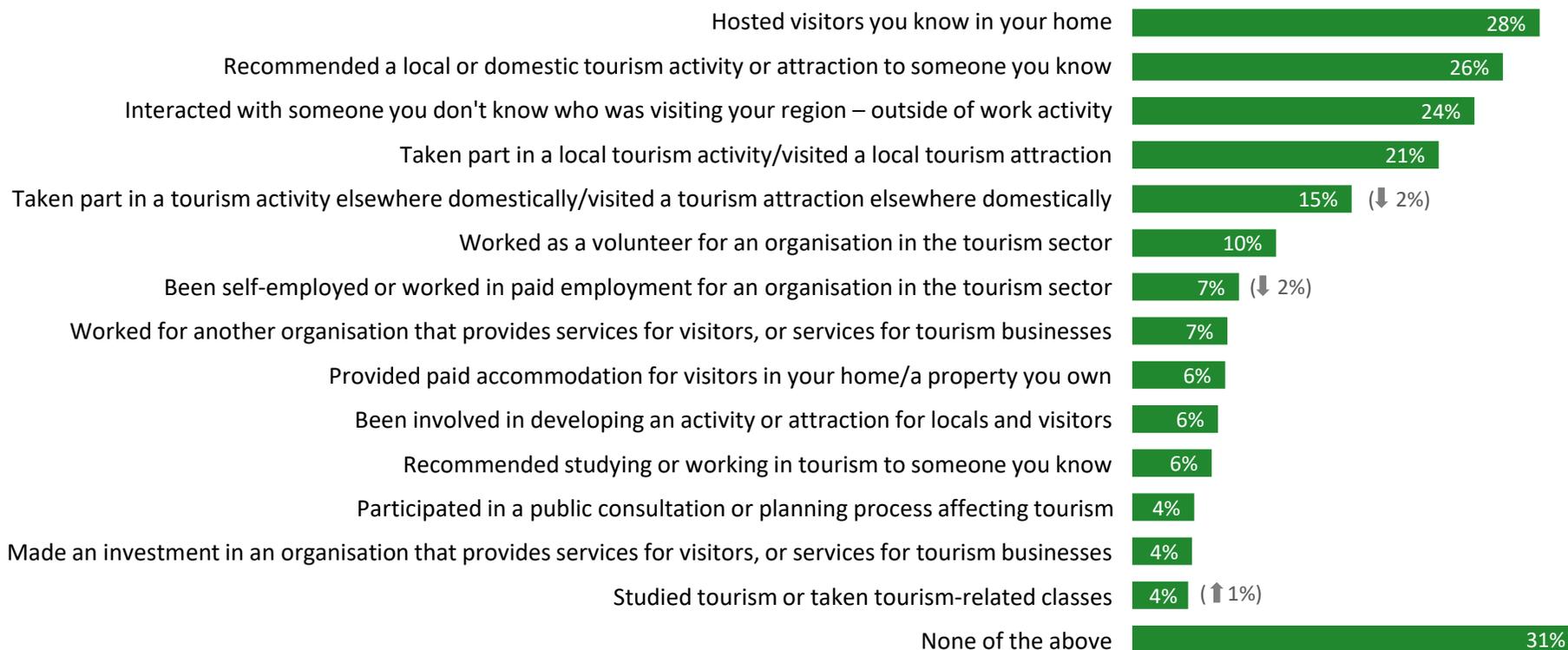


**ENGAGEMENT WITH
TOURISM/VISITORS**

ENGAGEMENT WITH TOURISM/VISITORS

69% of New Zealand residents have engaged with tourism/visitors in some way during the past two years. A year-on-year decline in the proportion of respondents indicating that they had taken part in a domestic tourism activity aligns with other evidence of a currently subdued domestic tourism market.

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



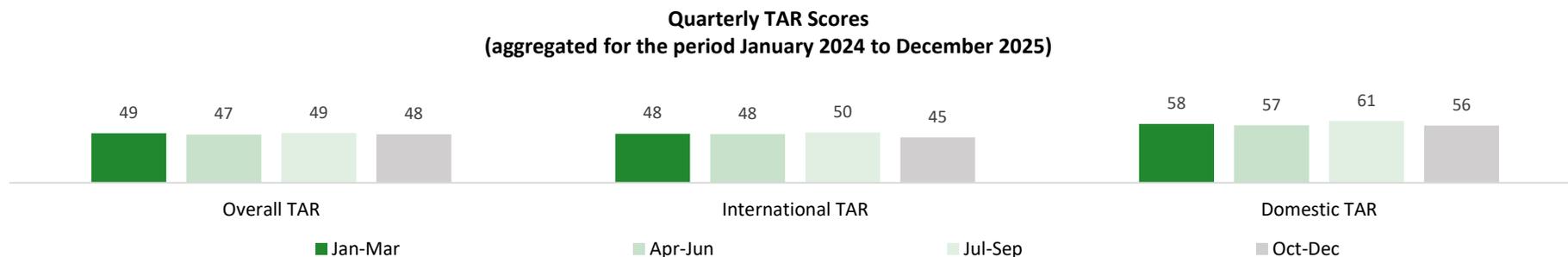


**DEEP DIVE:
SOCIAL LICENCE &
VISITOR VOLUME**

SOCIAL LICENSE & VISITOR VOLUME

This quarter’s deep-dive examines the relationship between **social license** - the ongoing acceptance and approval of tourism activities by local communities and other stakeholders – and **visitor volume**.

The analysis began by exploring how social license varied **by season**, based on the assumption that communities may experience the benefits and impacts of tourism differently at different times of year, especially given peak and off-peak visitor flows. Using the TAR Scores as indicators of social license, this analysis revealed little variation in sentiment across the seasons, as shown in the chart below.

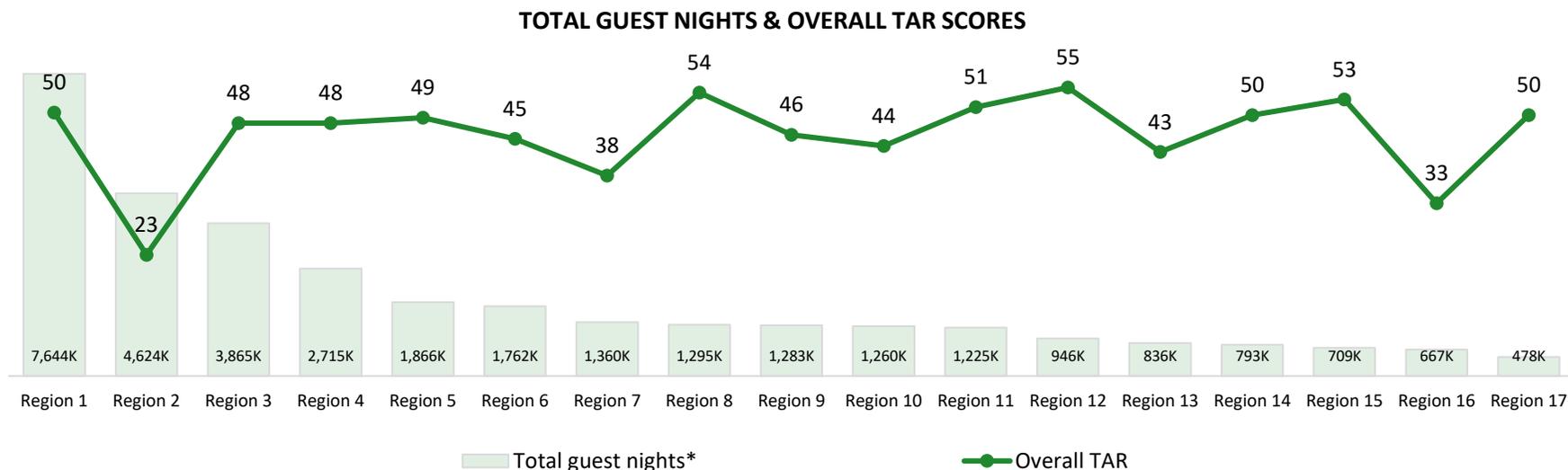


Given this, the focus shifted to understanding **how social license correlates with visitor volume more generally**. As shown below, there is a positive correlation between **international guest nights** (as recorded in the Accommodation Data Programme) and the **International TAR Score**, when viewed at a national level over the last five years. This relationship can also be seen in the Views on Tourism data in Australia and Ireland.



SOCIAL LICENSE & VISITOR VOLUME (CONT.)

However, beyond this, there is **no clear relationship** between visitor volume (as reflected in total commercial guest nights) and social license, when considered at a regional level.



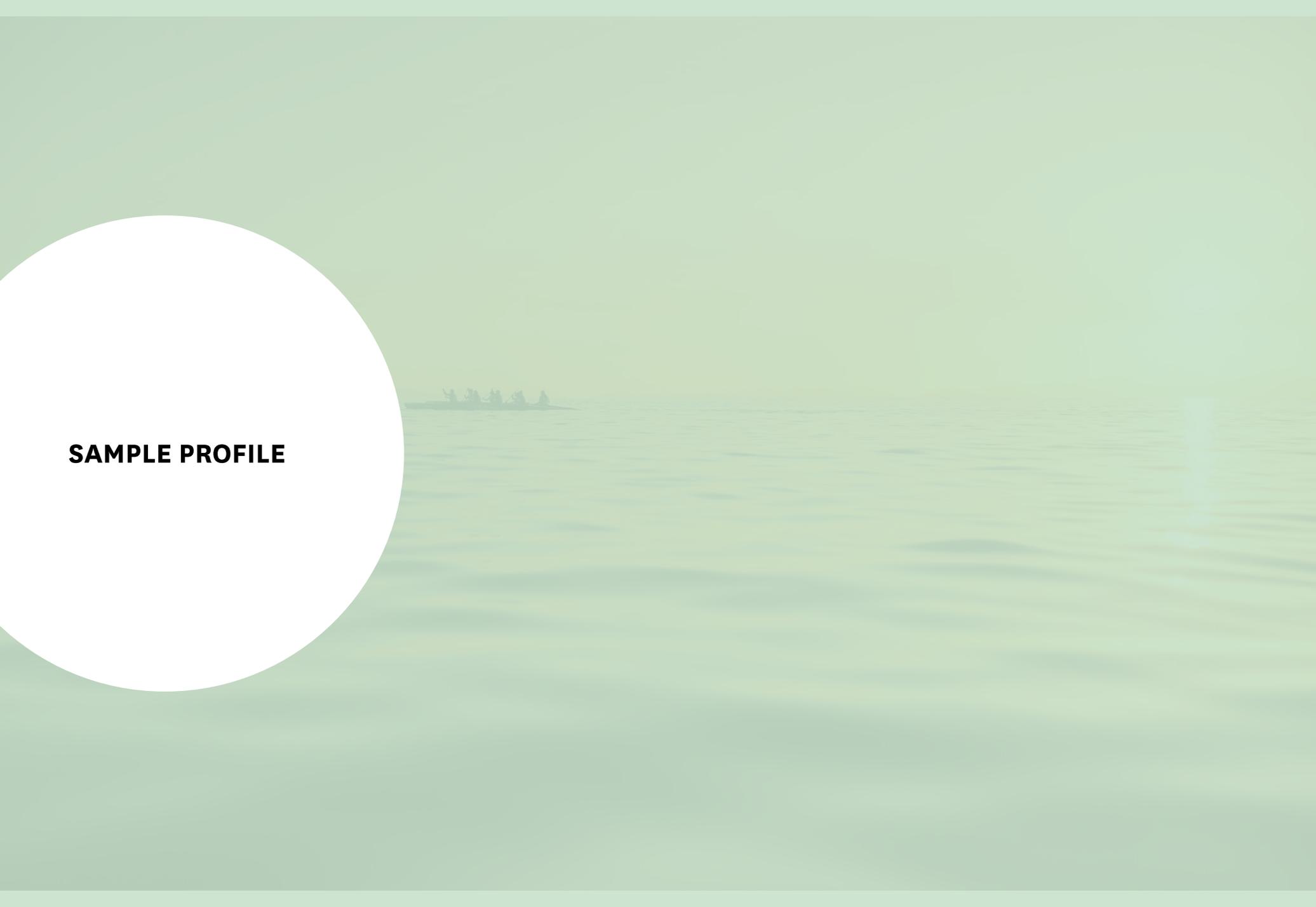
This aligns with other research on social carrying capacity, in which we see that visitor volume alone is not a reliable indicator of social license. A destination can host high volumes of visitors with limited social friction **if tourism is well-planned, benefits are visible, and impacts are managed**. Conversely, social license can be threatened at relatively low levels of visitation if tourism disrupts housing, impacts access to local services, or adversely affects local identity. Volume sensitivity can also vary based, for example, on culture, values, a community’s past experience of tourism, and key tourism characteristics (such as visitor type, visitor activities, and regional dispersal).

Importantly, this indicates that there is no objectively ‘right’ visitor volume, and that numbers **alone** cannot be used as a proxy measure for social license. It is **community sentiment** that is the critical metric for understanding both social license to operate, and a destination’s (social) carrying capacity.

It is in this context that **perception of visitor numbers** could be a potentially useful metric. In another jurisdiction, we have found a strong correlation between social license and a respondent’s perception of volume (as high, moderate, or low) and this measure is used alongside reported benefits and adverse impacts of tourism to assist with destination management planning and decision-making.



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%	14%
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	14%	14%
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%	2%
Manawatū-Whanganui	5%	5%
Wellington & Wairarapa	11%	10%
Tasman	1%	1%
Nelson	1%	2%
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	68%	68%
Other European	7%	7%
New Zealand Māori	12%	12%
Cook Island Māori	1%	1%
Indian	5%	5%
Chinese	4%	4%
Pacific Islander	3%	3%
Other	13%	12%
Household Composition		
My husband, wife or partner	55%	55%
My mother and/or father	7%	7%
My child/children aged under 5	11%	11%
My child/children aged 5 - 14	17%	17%
My child/children aged 15+	13%	13%
Other family/relatives	8%	8%
Other person(s)	7%	7%
None of the above - I live alone	19%	19%
Prefer not to say	1%	1%
Base: Total sample	n=3,164	



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& ASSOCIATES