

## INTRODUCTION

Following are findings from questions included in Views on Tourism research conducted during October 2022 to September 2023<sup>1</sup>. Tourism New Zealand is Angus & Associates' country-level partner for the research programme in New Zealand.

The Views on Tourism questions are designed to measure resident opinion on the value of international and domestic tourism and the extent to which tourism is having both positive and adverse impacts. The research considers New Zealand residents' views on tourism and its impacts on their region, and contrasts this with the sentiment expressed by residents of other destinations (currently Australia and Ireland) for context.

From 1 October, the research has been expanded to measure sentiment towards tourism activity overall (as well as retaining the separate international and domestic tourism sentiment measures), and residents' views on the extent of positive and negative impacts of tourism based on the four capitals (New Zealand's economy, environment, society, and culture). Initial information from the expanded survey will be available in early 2024.



## **METHODOLOGY**

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

The sample is drawn from a leading online research panel and all respondents are aged 18 years or more.

For key measures, results for Australia and Ireland are included in the report to provide more context for the New Zealand results and to serve as points of comparison. The same Views on Tourism® core question set, and similar methodologies are used in those destinations. Other destinations may join this benchmarking group over time.

#### 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**



Based on the Tourism Approval Rating (TAR score), resident sentiment towards tourism activity in New Zealand is at its highest since monitoring began in 2017, for both international and domestic tourism.

New Zealand residents view domestic tourism more favourably than international tourism. New Zealand's domestic TAR score of 63 (approval) is 12 points higher than its international TAR score of 51 (acceptance), however the international TAR score has improved in both of the past two years.

80% of New Zealand residents personally benefited from tourism activity in their local area in the year ending September 2023, a higher proportion compared with the same period last year (76%). More than one third (38%) see that tourism activity means more local businesses are open or able to stay open, and a similar proportion (37%) benefit from tourism activity providing opportunities for employment/income (for them or their family).

In the past year, 65% of New Zealand residents have been negatively impacted by tourism activity in their local area in some way. Three in ten (30%) have experienced more litter and waste generation and almost one quarter (24%) experience greater difficulty finding a car park or believe that it takes longer to get to places due to traffic/congestion caused by local tourism activity (23%).

Asked whether enough action is being taken to address the negative impacts of tourism, an average 71% agree that there is. Key actions that New Zealand residents believe will help mitigate the negative impacts of tourism include greater improvement of community infrastructure, managing/lowering living costs, improving safety, and taking better care of the environment.

# **KEY INSIGHTS (CONT.)**



Looking to the future, 30% of New Zealand residents would like the local tourism industry to focus most on improving community infrastructure. Others commonly believe key areas of focus should be creating employment for people in the community, attracting more of both international and domestic visitors, and encouraging visitors to travel outside of the peak season.

Two thirds of New Zealand residents (66%) have engaged with tourism/visitors in some way during the past two years. Almost three in ten (29%) have hosted visitors in their home. Other common activities included recommending a local or domestic tourism activity or attraction to someone they know, and interacting with someone they don't know who was visiting their region.



# Views on Tourism Snapshot: New Zealand Residents

Research was conducted between October 2022 and September 2023 using Angus & Associates' Views on Tourism© programme. The sample includes n=3,234 New Zealand residents aged 18+ years.

#### **TOURISM APPROVAL RATING (TAR)**

TAR score highlights residents' overall perceptions of tourism

#### International TAR:

New Zealand	Australia	Ireland
51	50	65





80% of New Zealand residents have experienced <u>benefits</u> 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



A greater variety of goods and services is available than otherwise would be



Greater appreciation of the natural environment

65% of New Zealand residents have experienced <u>adverse impacts</u> 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



Higher day to day living costs

#### Residents' most commonly want their local tourism industry to focus in the future on...



Improving community infrastructure



Creating employment for people in the community



Attracting more international visitors



Attracting more domestic visitors



Encouraging visitors to travel outside the peak season





## INTERNATIONAL TOURISM

Nine in ten New Zealand residents (92%) agree that international tourism is good for New Zealand; however, a slightly smaller proportion (86%) agree that international tourism is good for their region.

Despite the benefits of international tourism being widely acknowledged by New Zealand residents, almost one third (32%) believe that international visitors put too much pressure on New Zealand, and one fourth (26%) believe that international visitors put too much pressure on their region. While still significant, these proportions are lower than they were in the previous year.

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 51).

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 among Māori (at 41) and Chinese New Zealanders (at 38), as well as among those who live in rural areas (at 47) and those who have not travelled in the past 12 months (at 45).



#### International tourism is good for New Zealand



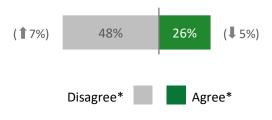
#### International tourism is good for my region



#### International visitors are putting too much pressure on New Zealand

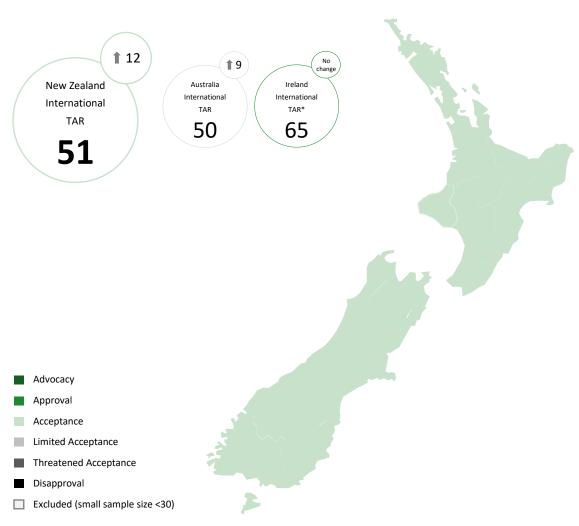


#### International visitors are putting too much pressure on my region

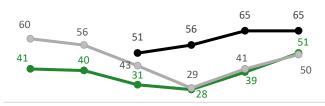


Base: Total sample - New Zealand residents n=3,234

# **INTERNATIONAL TOURISM (CONT.)**



#### **Annual International TAR - Trend**



YE Sep 18 YE Sep 19 YE Sep 20 YE Sep 21 YE Sep 22 YE Sep 23

NZ ——AU ——Ireland (Apr-Sep only)

Region	International TAR	N=
Northland	58	118
Auckland	50	1,008
Waikato	52	305
Bay of Plenty/Gisborne/Hawke's Bay	51	377
Taranaki/Manawatū-Wanganui	50	261
Wellington	55	379
Tasman/Nelson/Marlborough/West Coast	44	121
Canterbury	53	428
Otago/Southland	48	237

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 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.



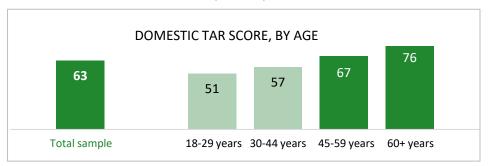
### **DOMESTIC TOURISM**

Nine in ten New Zealand residents (93%) agree that domestic tourism is good for New Zealand and a similar proportion (90%) agree that domestic tourism is good for their region.

At the same time, one in five New Zealand residents (20%) believe that domestic tourism is putting too much pressure on New Zealand, and a similar proportion (20%) believe that domestic tourism is putting too much pressure on their region. These proportions have not changed significantly from the previous year.

New Zealand's domestic TAR score, which takes into account the positive and negative impacts of domestic tourism is more favourable than its international TAR score. New Zealand has a domestic TAR score of 63 – this is 12 points higher than the international TAR score.

Like 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 58). By ethnicity, it is lower than it is for the total sample for Māori (at 53), and for Chinese and Indian New Zealanders (at 48 and 55 respectively).



#### Domestic tourism is good for New Zealand



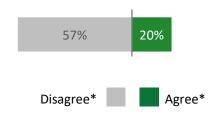
#### Domestic tourism is good for my region



#### Domestic visitors are putting too much pressure on New Zealand

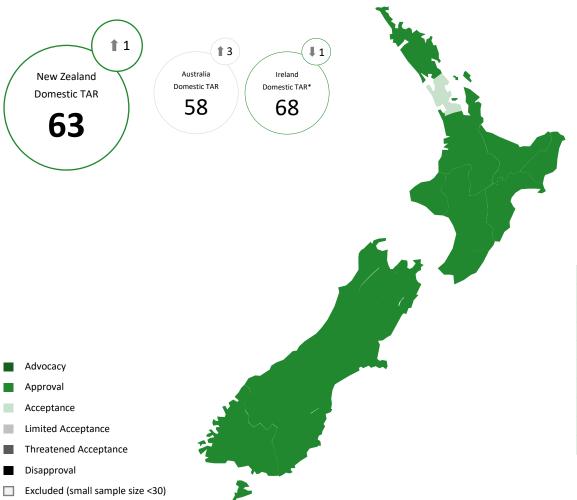


#### Domestic visitors are putting too much pressure on my region

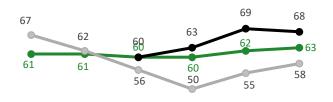


Base: Total sample - New Zealand residents n=3,234

# **DOMESTIC TOURISM (CONT.)**



#### **Annual Domestic TAR - Trend**



YE Sep 18 YE Sep 19 YE Sep 20 YE Sep 21 YE Sep 22 YE Sep 23



Region	Domestic TAR	N=
Northland	64	118
Auckland	59	1,008
Waikato	62	305
Bay of Plenty/Gisborne/Hawke's Bay	63	377
Taranaki/Manawatū-Wanganui	67	261
Wellington	67	379
Tasman/Nelson/Marlborough/West Coast	65	121
Canterbury	70	428
Otago/Southland	64	237

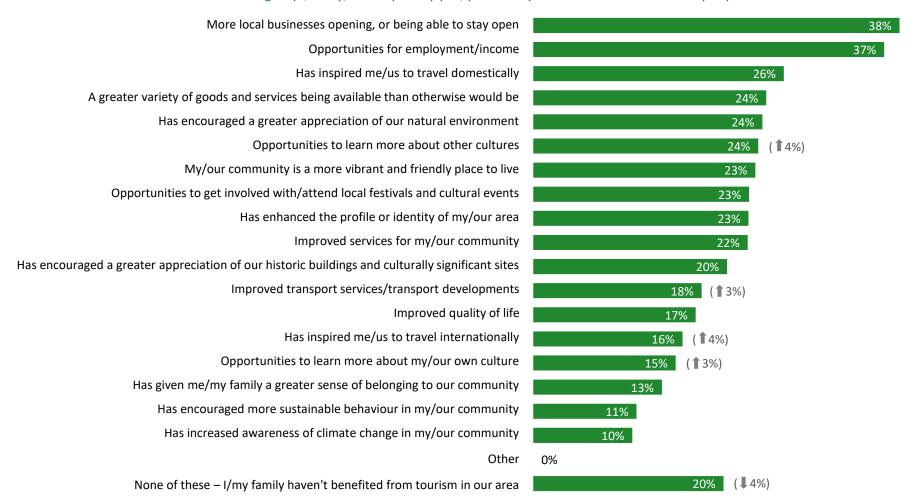
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## BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

80% of New Zealand residents personally benefit from tourism activity in their local area in some way. This proportion is higher than last year.

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

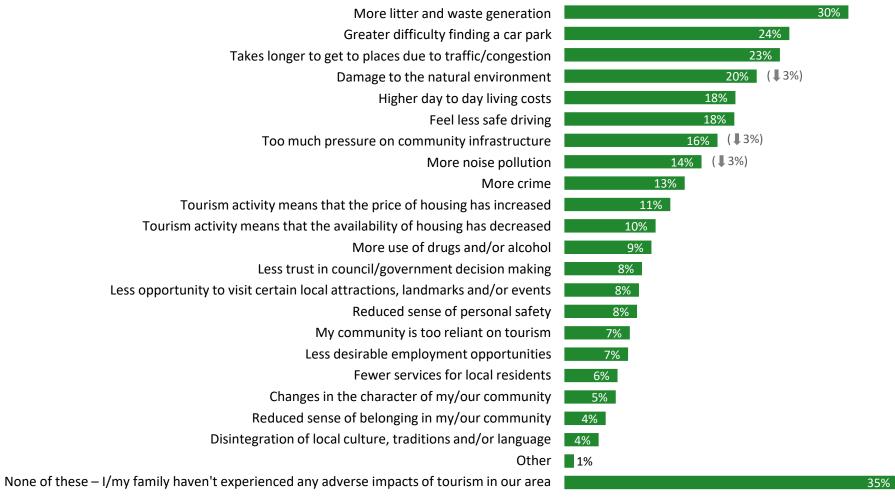




## **NEGATIVE IMPACTS OF TOURISM ACTIVITY IN LOCAL AREA**

Improvement is evident for the negative impacts of damage to the natural environment, pressure on community infrastructure, and noise pollution.

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





## **ACTION TAKEN TO ADDRESS THE NEGATIVE IMPACTS OF TOURISM**

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

#### Negative impact (ranked by prevalence) More litter and waste generation (30%) 4% 22% Greater difficulty finding a car park (24%) 16% Takes longer to get to places due to traffic/congestion (23%) 4% 17% Damage to the natural environment (20%) 3% 14% Higher day to day living costs (18%) 3% 13% Feel less safe driving (18%) 3% 12% Too much pressure on community infrastructure (16%) 3% 11% More noise pollution (14%) 19 11% More crime (13%) 9% Tourism activity means that the price of housing has increased (11%) 8% Tourism activity means that the availability of housing has decreased (10%) 7% More use of drugs and/or alcohol (9%) 7% Less trust in council/government decision making (8%) 6% **Disagree** enough action is being taken Less opportunity to visit certain local attractions, landmarks and/or events (8%) 5% Agree enough action is being taken Reduced sense of personal safety (8%) Neither agree nor disagree/Don't know My community is too reliant on tourism (7%) 5% Less desirable employment opportunities (7%)



## IDEAS FOR BETTER ADDRESSING TOURISM NEGATIVE IMPACTS

#### **COMMUNITY INFRASTRUCTURE**

"The infrastructure needs to be improved overall and roads need repair in many areas already. Tourists are not going to all areas of the city, so improvements to where they most go will help."

"More bins/recycling options/greater penalties for littering."

"More toilets should be made available; they are difficult to find."

"Build another bridge, remove vehicles from the CBD."

"Council providing more parking."

"Make certain areas rubbish free so that everyone who visits has to take their rubbish away with them. It works at Okahu Bay,

Auckland."

"Better public transport."

"Better roads in Northland."

"The local authorities need to invest heavily in infrastructure 3 waters, roads and services facilities."

"Stop removing carparks for bus & cycle lanes."

"Build them properly and maintain them... get the trucks off the road."

"Roads need to be more resilient."

"Spend more on roads to bring a better standard."

"Repair the roads and footpaths."

"This infrastructure is really lacking, and service has diminished from our local council."

#### LIVING COSTS

"Costs need to be lowered for food, gas, clothes etc., everything is such bad quality these days but is so overpriced."

"The local markets need to be upkept so they can provide residents with affordable food."

"The government and councils need to cut back on spending."

#### **SAFETY**

"More permanent police presence – they do increase this at peak times in Mangawhai - however it is not always enough... also CCTV camera network would help."

"Crime in general needs heaps of work."

"Strict checking on local driving rules before tourists can hire a vehicle."

"Maybe the presence of police on foot in the CBD and other shopping areas will help both tourists and residents feel more at ease."

#### **NATURAL ENVIRONMENT**

"Everything needs to be done to save our environment. It's gone so far beyond just the damage of tourism; I absolutely despair over climate change. I consider it to be the human race's greatest existential crisis."

"Enforce maximum noise limits for vehicles and activities."

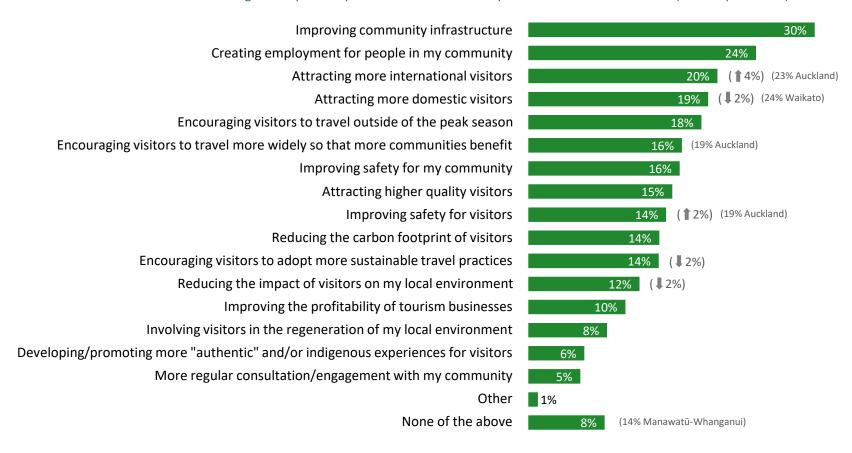
"Restrictions on numbers visiting."





### **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)





# **TOURISM RECOVERY COMMENTS (Q3 2023)**

What other comments do you have, if any, on the recovery of tourism in your community or New Zealand following the Covid-19 pandemic?

Among those who commented on this question during July to September 2023, 30% observed that tourism is recovering, 17% commented about the number of tourists, and 16% commented about the need to provide more attractions/activities/offerings for visitors. Other themes identified include concern about the cost of living and/or travel prices, that recovery has been difficult after Covid-19, and that there is a need for infrastructure improvement and investment in community facilities.

"Slow to ramp back up but it should return to normal levels soon."

"It's slowly coming back, but there are still risks involved."

"I feel like tourism has bounced back quite strongly in Canterbury, which has been good to see."

"Now that visitor numbers equal or surpass pre-Covid numbers and tourism is embedded in our economic structure there needs to be a huge investment in infrastructure and related services to support the industry."

"Get as many people in as possible and get them spending."

"Better attractions & activities."

"Be aware more visitors is good, but employment also becomes an issue."

"New Zealand see overseas and local tourists as cash cows, it is far too expensive to do half the experiences you would like to. The cost of tourism in NZ needs to come down."

"Hamilton in particular lacks a good range of quality accommodation."

"Greater connectivity between airports and the city which must be attractive, affordable for all visitors, and reliable."

"Still struggling to get business and staff."

"There needs to be a greater investment in infrastructure to handle higher numbers."

"We need to build tourism up again, it creates jobs, keeps businesses afloat and adds to our GDP."

"Need more money spent on infrastructure in Auckland CBD."





# RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

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







# **SAMPLE PROFILE (UNWEIGHTED)**

Gender	
Male	49%
Female	50%
Gender diverse	1%
Prefer not to say	0%
Age	
18 – 29 years	20%
30 – 39 years	18%
40 – 49 years	18%
50 – 59 years	18%
60 – 69 years	12%
70+ years	14%
Travel in Past 12 Months	
Travelled in New Zealand	74%
Travelled outside New Zealand	15%
Have not travelled	19%
Base: Total sample	n=3,234

Region	
Northland	4%
Auckland	31%
Waikato	9%
Bay of Plenty	7%
Gisborne	1%
Hawke's Bay	4%
Taranaki	3%
Manawatū-Whanganui	5%
Wellington (& Wairarapa)	12%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	1%
Canterbury	13%
Otago	5%
Southland	2%
Base: Total sample	n=3,234

Ethnicity	
New Zealand European	70%
Other European	6%
New Zealand Māori	12%
Cook Island Māori	1%
Indian	5%
Chinese	3%
Pacific Islander	3%
Other	10%
Household Composition	
My husband, wife or partner	56%
	56% 7%
My husband, wife or partner	2 2
My husband, wife or partner My mother and/or father	7%
My husband, wife or partner My mother and/or father My child/children aged under 5	7% 12%
My husband, wife or partner My mother and/or father My child/children aged under 5 My child/children aged 5 - 14	7% 12% 18%
My husband, wife or partner My mother and/or father My child/children aged under 5 My child/children aged 5 - 14 My child/children aged 15+	7% 12% 18% 14%
My husband, wife or partner My mother and/or father My child/children aged under 5 My child/children aged 5 - 14 My child/children aged 15+ Other family/relatives	7% 12% 18% 14% 10%
My husband, wife or partner My mother and/or father My child/children aged under 5 My child/children aged 5 - 14 My child/children aged 15+ Other family/relatives Other person(s)	7% 12% 18% 14% 10% 8%

