

YEAR ENDING MARCH 2025

VIEWS ON TOURISM: NEW ZEALAND

VIEWS ON TOURISM[©] PROGRAMME

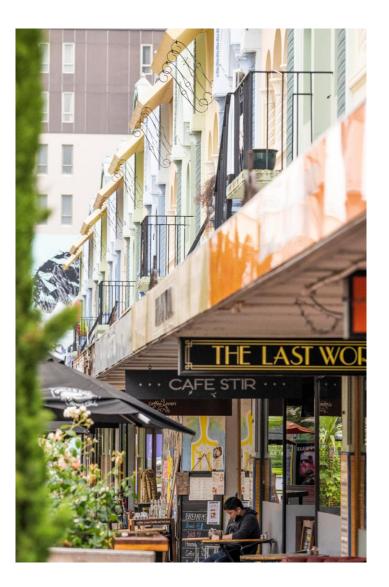
INTRODUCTION

This report updates findings of the Views on Tourism[©] research to include the year ending March 2025¹. 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).

From 1 July 2024, the wording of the question concerning whether sufficient action is being taken on negative impacts was changed. Results are therefore reported for the three most recent quarters only (July 2024 – March 2025) and findings are presented in an orange colour palette to distinguish this data from results which are based on the latest full year sample (April 2024 to March 2025).



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 survey sample is drawn from a leading online research panel.

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 three scores – one for inbound tourism, one for domestic tourism, and one for 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 scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' overall perceptions of tourism ('tourism sentiment') on an ongoing basis.



VIEWS ON TOURISM: NEW ZEALAND (YE MAR 2025)

KEY INSIGHTS



Tourism benefits & adverse impacts

Seven in ten New Zealand residents have engaged with tourism/visitors in some way during the last two years.

82% of New Zealand residents felt they had **personally benefited** from tourism activity in their local area in the year to March 2025, an increase of 2% on the year prior. As in previous years, the most commonly-reported benefits were more local businesses opening/being able to stay open (36%), and opportunities for employment/income created by tourism (36%).

At the same time, seven in ten New Zealand residents said they had been **negatively impacted** by tourism activity in their local area in the year to March 2025. This is a 4% increase on the previous year (68%). The top three concerns were consistent from year to year – more litter and waste generation, greater difficulty finding car parking, and damage to the natural environment.

Tourism Approval Rating (TAR) scores

For the year ending March 2025, the New Zealand resident TAR score for tourism overall is at the level of 'acceptance' (at 47). Both the international and domestic TAR scores have fallen from the prior year (YE March 2024) and now sit at 47 and 57, respectively.

This decline in TAR scores corresponds with significant year-on-year increases in the proportions of New Zealand residents who agree that both international and domestic visitors are putting too much pressure on the country, and on their region.

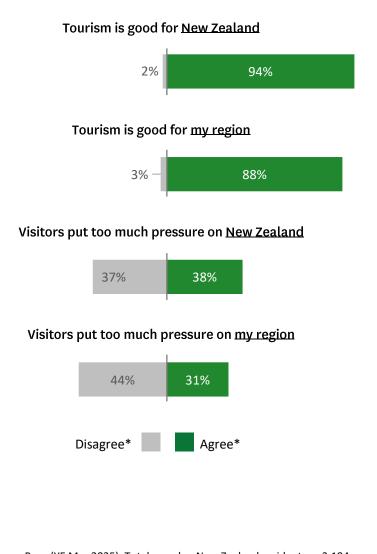
OVERALL SENTIMENT TOWARDS TOURISM ACTIVITY

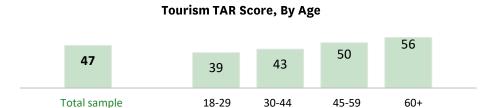
OVERALL TOURISM

While the vast majority of New Zealand residents agree that tourism is good for New Zealand (94%) and/or for their region (88%), 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. These results have been consistent across the four quarters of this measure to date.

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

The tourism TAR score is also lower than it is for the total sample amongst NZ Māori (40), Chinese (36) and Cook Island Māori (31).







OVERALL 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

New Zealand Overall TAR **47** Australia Overall TAR 51

Ireland

Overall TAR*

65

Region	Overall TAR	N=
Northland	49	117
Auckland	50	1,012
Waikato	52	288
Bay of Plenty/Gisborne/Hawke's Bay	49	388
Taranaki/Manawatu-Wanganui	47	228
Wellington	51	333
Tasman/Nelson/Marlborough/West Coast	40	125
Canterbury	46	391
Otago/Southland	35	312

Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. <u>Regional TAR scores should be treated as indicative only</u> - 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

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 is 3 points lower than in YE March 2024 and can be explained by significant increases in the proportion of those who believe that international visitors put too much pressure **on New Zealand** and in the proportion that believe international visitors put too much pressure **on their region**.

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

As with the overall TAR score, the international TAR score is also lower than average amongst NZ Māori (38), Chinese (36) and Cook Island Māori (27).



Agree*



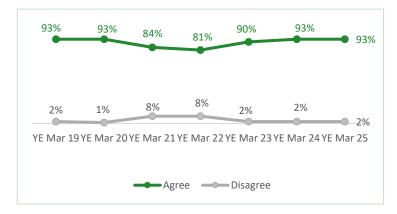
Base (YE Mar 2025): Total sample - New Zealand residents n=3,194 Arrows (1/1) indicate statistically significant differences vs YE Mar 2024 at 95% confidence level *Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

Disagree*

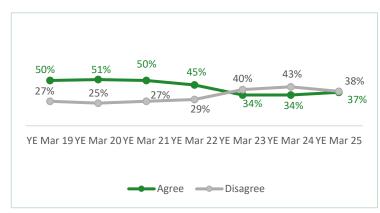


INTERNATIONAL TOURISM

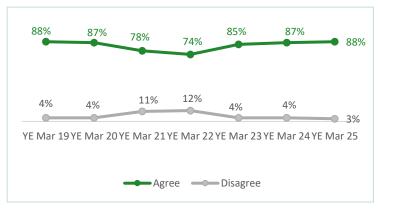
International tourism is good for New Zealand



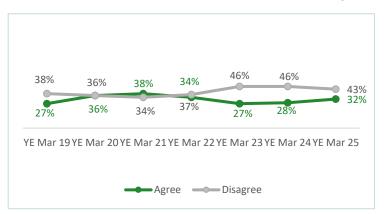
International visitors put too much pressure on New Zealand



International tourism is good for my region



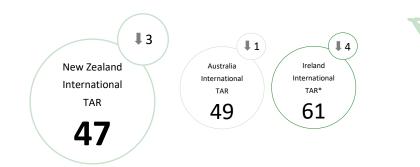
International visitors put too much pressure on my region



Base: Total sample - New Zealand residents: YE Mar 19 (n=2,478); YE Mar 20 (n=2,749); YE Mar 21 (n=3,041); YE Mar 22 (n=3,097); YE Mar 23 (n=3,220); YE Mar 24 (n=3,113); YE Mar 25 (n=3,194) *Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

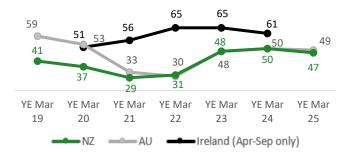


INTERNATIONAL TOURISM (CONT.)



Every NZ region is currently at the *acceptance* level, except for Tasman/Nelson/Marlborough/West Coast and Otago/Southland which are at the *limited acceptance* level.



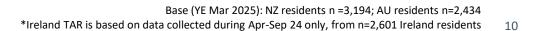


Region	International TAR	N=
Northland	51	117
Auckland	50	1,012
Waikato	51	288
Bay of Plenty/Gisborne/Hawke's Bay	50	388
Taranaki/Manawatu-Wanganui	46	228
Wellington	50	333
Tasman/Nelson/Marlborough/West Coast	39	125
Canterbury	45	391
Otago/Southland	34	312

Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. <u>Regional TAR scores should be treated as indicative only</u> - 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.



- Acceptance
- Limited Acceptance
- Threatened Acceptance
- Disapproval



DOMESTIC TOURISM

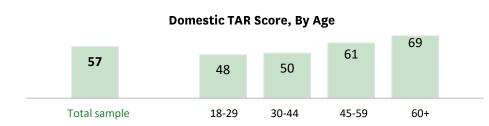
While the great majority of NZ residents continue to agree that domestic tourism is good both for New Zealand and for their region, there has been a significant change in views on the pressure exerted by domestic visitors over the last 12 months.

New Zealand's domestic TAR score, which takes into account the positive and negative impacts of domestic tourism, has fallen to 57, down from 61 in the previous 12-month period. As for international tourism, support for domestic tourism has a correlation with age (older residents are more likely to be supportive).

The domestic TAR score is lower than it is for the total sample amongst Chinese (44), Cook Island Māori (45) and NZ Māori (51).



11

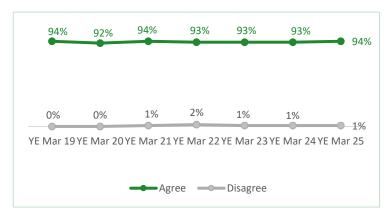


Base (YE Mar 2025): Total sample - New Zealand residents n=3,194 Arrows (**1**/**I**) indicate statistically significant differences vs YE Mar 2024 at 95% confidence level *Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded

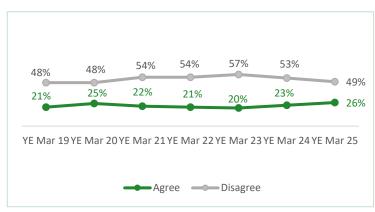


DOMESTIC TOURISM

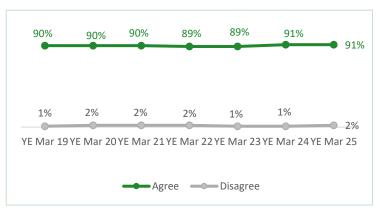
Domestic tourism is good for <u>New Zealand</u>



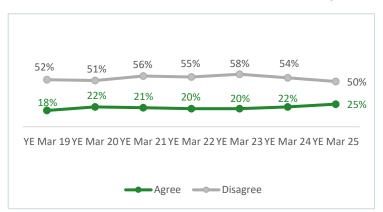
Domestic visitors put too much pressure on New Zealand



Domestic tourism is good for my region



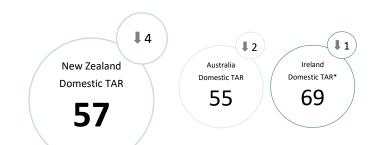
Domestic visitors put too much pressure on my region



Base: Total sample - New Zealand residents: YE Mar 19 (n=2,478); YE Mar 20 (n=2,749); YE Mar 21 (n=3,041); YE Mar 22 (n=3,097); YE Mar 23 (n=3,220); YE Mar 24 (n=3,113); YE Mar 25 (n=3,194) *Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded



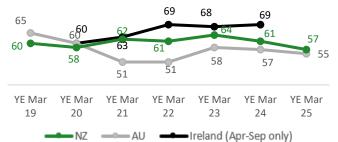
DOMESTIC TOURISM (CONT.)



Wellington, Bay of Plenty/Gisborne/Hawke's Bay and Canterbury are currently at the *approval* level; and the rest of NZ is currently at the *acceptance* level.



Annual Domestic TAR - Trend

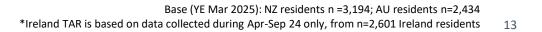


Region	Domestic TAR	N=
Northland	57	117
Auckland	57	1,012
Waikato	58	288
Bay of Plenty/Gisborne/Hawke's Bay	54	388
Taranaki/Manawatu-Wanganui	55	228
Wellington	61	333
Tasman/Nelson/Marlborough/West Coast	55	125
Canterbury	62	391
Otago/Southland	57	312

Sample sizes for some regions are relatively small - some neighboring regions have been grouped to ensure sufficient sample. <u>Regional TAR scores should be treated as indicative only</u> - 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.



- Limited Acceptance
- Threatened Acceptance
- Disapproval



Views on Tourism Snapshot: New Zealand Residents

Research was conducted between April 2024 and March 2025 using Angus & Associates' Views on Tourism[©] programme. The sample includes n=3,194 New Zealand residents aged 18+ years.

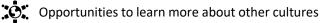
TOURISM APPROVAL RATING (TAR)

TAR score highlights residents' overall perceptions of tourism



82% of New Zealand residents have experienced benefits from tourism activity in their area, and the top 5 are...

- More local businesses opening, or being able to stay open
- 88 **Opportunities for employment & income**



- Inspired them to travel domestically
- Greater appreciation of the natural environment

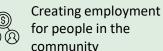
72% of New Zealand residents have experienced adverse impacts from tourism activity in their area, and the top 5 are...

- €
 - More litter and waste generation
- Greater difficulty finding a car park
- The second 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



Attracting more international visitors



Encouraging visitors to travel outside the peak season



Attracting more domestic visitors

angus & associates

A

(+/-) indicates change in TAR score relative to YE March 2024. Note that no prior year data is available for the Overall TAR scores. 14 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...



Negative* Positive*

Base (YE Mar 2025): Total sample - New Zealand residents n=3,194 *Negative = Very negative + Negative; Positive = Very positive + Positive; 'Neither positive nor negative' responses excluded 16

FELT BENEFITS & IMPACTS OF TOURISM ACTIVITY

BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

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

			82% of NZ residents
36%		More local businesses opening, or being able to stay open	report having
36%		Opportunities for employment/income	experienced one or
28%		Has inspired me/us to travel domestically	more benefits of
28%		Opportunities to learn more about other cultures	tourism activity in
24%		Has encouraged a greater appreciation of our natural environment	their local area (12%)
23%		reater variety of goods and services being available than otherwise would be	A gr
23%		My/our community is a more vibrant and friendly place to live	
23%		Opportunities to get involved with/attend local festivals and cultural events	
23%		Improved services for my/our community	
23%		Has enhanced the profile or identity of my/our area	
22%		a greater appreciation of our historic buildings and culturally significant sites	Has encouraged
20%		Encourages protection of my/our local natural environment	
20%		incourages protection of significant cultural and heritage sites in my/our area	Er
19%		Opportunities to learn more about my/our own culture	
19%		Improved quality of life	
19%		Improved transport services/transport developments	
19%		Has inspired me/us to travel internationally	
18%		ables me/my family to share our culture and values with the rest of the world	Ena
13%		Has given me/my family a greater sense of belonging to our community	
13%		Has encouraged more sustainable behaviour in my/our community	
11%		Has increased awareness of climate change in my/our community	
	0%	Other	
18% (↓2%)		None of these – I/my family haven't benefited from tourism in our area	

Base (YE Mar 2025): Total sample - New Zealand residents n=3,194

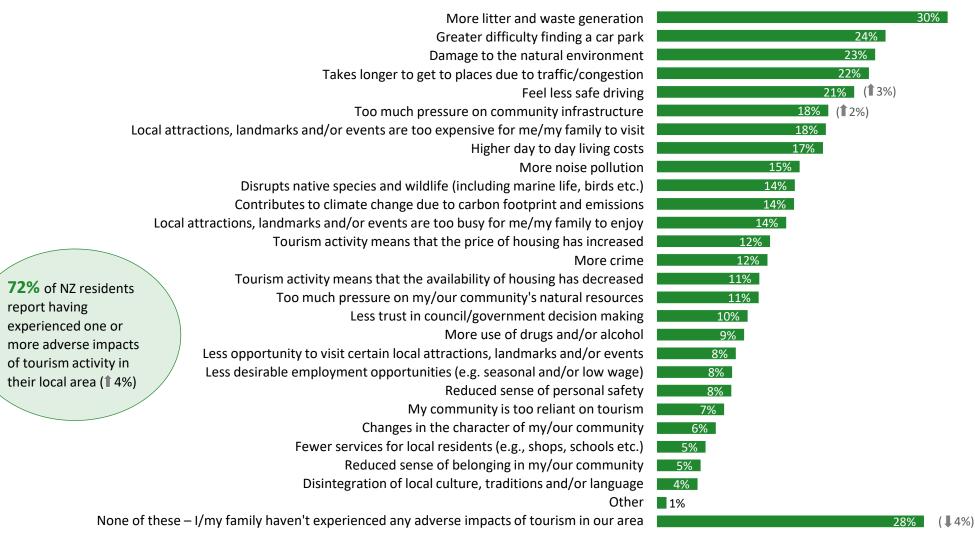
Arrows (1 / 1) indicate statistically significant differences vs YE March 2024 at 95% confidence level 18 *Option added in Oct 23 so no comparison available



070/ of NIZ we state whe

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?



Base (YE Mar 2025): Total sample - New Zealand residents n=3,194

Arrows (/ /) indicate statistically significant differences vs YE March 2024 at 95% confidence level 19

*Options added in Oct 23 so no comparison available

**e.g., through increased water and energy consumption

angus & associates

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, Jul 2024 – Mar 2025 only)

More litter and waste generation (30%)	13% 10% 7%	70%
Greater difficulty finding a car park (24%)	10% 7% 6%	76%
Damage to the natural environment (23%)	8% 8% 7%	77%
Takes longer to get to places due to traffic/congestion (22%)	10% 6% 6%	78%
Feel less safe driving (21%)	10% 6% 5%	79%
Too much pressure on community infrastructure (18%)	<mark>9% 5%</mark> 4%	82%
Local attractions, landmarks and/or events are too expensive for me/my family to visit (18%)	9% 5% 4%	82%
Higher day to day living costs (17%)	<mark>9% 4%</mark> 5%	83%
More noise pollution (15%)	5% 4% 6%	85%
Disrupts native species and wildlife (including marine life, birds etc.) (14%)	2 <mark>%</mark> 6% 6%	85%
Contributes to climate change due to carbon footprint and emissions (14%)	<mark>5% 5%</mark> 5%	86%
Local attractions, landmarks and/or events are too busy for me/my family to enjoy (14%)	<mark>3%</mark> 5% 5%	86%
Tourism activity means that the price of housing has increased (12%)	<mark>5% 3%</mark> 4%	88%
More crime (12%)	<mark>4%</mark> 4% <mark>3%</mark>	89%
Too much pressure on my/our community's natural resources (11%)	<mark>3%</mark> 4%	89%

Not enough action taken Enough action taken No adverse impact

Don't know

Base (Jul 24 - Mar 25): Total sample - New Zealand residents n=2,384



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?*

<u>Negative impact (Top 15 - ranked by prevalence, Jul 2024 - Mar 2025 only)</u>		
More litter and waste generation (30%)	44%	33%
Greater difficulty finding a car park (24%)	43%	31%
Damage to the natural environment (23%)	36%	35%
Takes longer to get to places due to traffic/congestion (22%)	45%	29%
Feel less safe driving (21%)	49%	28%
Too much pressure on community infrastructure (18%)	50%	29%
Local attractions, landmarks and/or events are too expensive for me/my family to visit (18%)	48%	27%
Higher day to day living costs (17%)	50%	21%
More noise pollution (15%)	33%	30%
Disrupts native species and wildlife (including marine life, birds etc.) (14%)	17%	40%
Contributes to climate change due to carbon footprint and emissions (14%)	33%	34%
Local attractions, landmarks and/or events are too busy for me/my family to enjoy (14%)	22%	37%
Tourism activity means that the price of housing has increased (12%)	43%	26%
More crime (12%)	40%	32%
Too much pressure on my/our community's natural resources (11%)	28%	37%
		_

Enough action is being taken

Not enough action is being taken

Base (Jul 24 – Mar 25): Total sample – New Zealand residents n=2,384 'Don't know' and no impact responses excluded

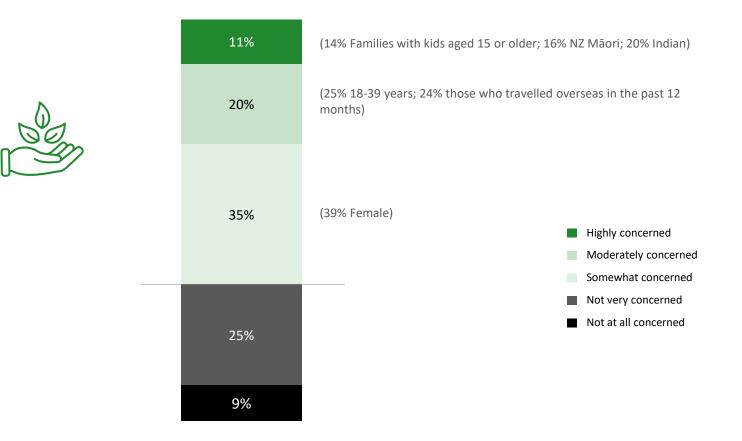


ENVIRONMENTAL IMPACTS OF TOURISM

CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

Two-thirds 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?

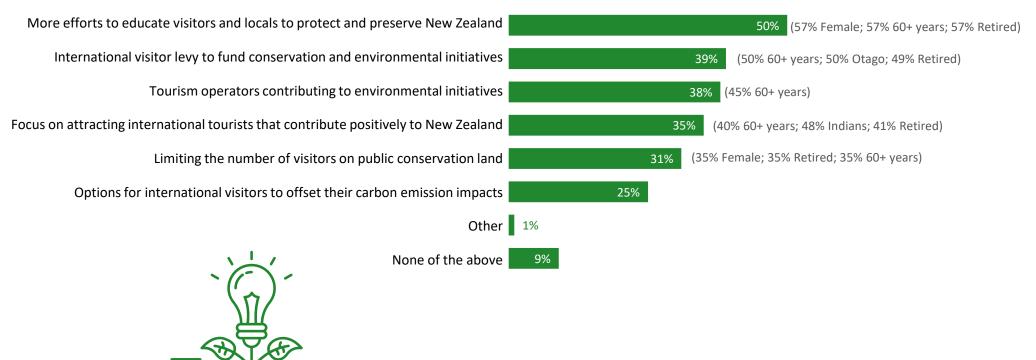




MEASURES TO MITIGATE ENVIRONMENTAL IMPACTS

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?





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)

Improving community infrastructure	28%
Creating employment for people in my community	24%
Attracting more international visitors	19%
Encouraging visitors to travel outside of the peak season	18%
Attracting more domestic visitors	17%
Attracting higher quality visitors	15%
Encouraging visitors to travel more widely so that more communities benefit	15%
Improving safety for visitors	14%
Encouraging visitors to adopt more sustainable travel practices	13%
Reducing the impact of visitors on my local environment	13%
Improving safety for my community	13% (↓ 2%)
Reducing the carbon footprint of visitors	13%
Protecting or enhancing cultural heritage sites*	12%
Improving the profitability of tourism businesses	11%
Involving visitors in the regeneration of my local environment	8%
More regular consultation/engagement with my community	6%
Developing/promoting more "authentic" and/or indigenous experiences for visitors to my community	6%
Other	1%
None of the above	8%



RESIDENT ENGAGEMENT ACTIONS WITH VISITORS

RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

70% of New Zealand residents have engaged with tourism/visitors in some way during the past two years.

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

Hosted visitors you know in your home	30%
Recommended a local or domestic tourism activity or attraction to someone you know	27% (1 3%)
Interacted with someone you don't know who was visiting your region – outside of work activity	25%
Taken part in a local tourism activity/visited a local tourism attraction	21% (1 2%)
Taken part in a tourism activity elsewhere domestically/visited a tourism attraction elsewhere domestically	17%
Worked as a volunteer for an organisation in the tourism sector	10% (1 2%)
Been self-employed or worked in paid employment for an organisation in the tourism sector	9% (1 2%)
Worked for another organisation that provides services for visitors, or services for tourism businesses	6%
Provided paid accommodation for visitors in your home/a property you own	6%
Recommended studying or working in tourism to someone you know	6%
Been involved in developing an activity or attraction for locals and visitors	5%
Made an investment in an organisation that provides services for visitors, or services for tourism businesses	4%
Participated in a public consultation or planning process affecting tourism	4% (1%)
Studied tourism or taken tourism-related classes	3%
None of the above	30%



SAMPLE PROFILE

SAMPLE PROFILE

Gender	
Male	48%
Female	51%
Gender diverse / Prefer not to say	1%
Age	
18 – 29 years	22%
30 – 39 years	17%
40 – 49 years	17%
50 – 59 years	17%
60 – 69 years	13%
70+ years	14%
Travel in Past 12 Months	
Travelled around New Zealand	75%
Travelled to Australia	24%
Travelled overseas (outside of Australasia)	27%
Have not travelled	14%
Base: Total sample	n=3,194

Region	
Northland	4%
Auckland	32%
Waikato	9%
Bay of Plenty	8%
Gisborne	1%
Hawke's Bay	4%
Taranaki	2%
Manawatū-Whanganui	5%
Wellington & Wairarapa	10%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	1%
Canterbury	12%
Otago	8%
Southland	2%
Base: Total sample	n=3,194

Ethnicity	
New Zealand European	68%
Other European	7%
New Zealand Māori	11%
Cook Island Māori	1%
Indian	5%
Chinese	4%
Pacific Islander	3%
Other	13%
Household Composition	
My husband, wife or partner	57%
My mother and/or father	7%
My child/children aged under 5	11%
My child/children aged 5 - 14	16%
My child/children aged 15+	13%
Other family/relatives	9%
Other person(s)	7%
None of the above - I live alone	17%
Prefer not to say	1%
Base: Total sample	n=3,194



