VIEWS ON TOURISM® PROGRAMME **VIEWS ON TOURISM: NEW ZEALAND** YEAR ENDING DECEMBER 2023

INTRODUCTION

Following are findings from questions included in Views on Tourism[©] research conducted during January 2023 to December 2023¹. Tourism New Zealand is Angus & Associates' country-level partner for the research programme in New Zealand.

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

From 1 October 2023, the research 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 is available in this report on the pages clearly noted as Q4 2023 and visually distinguished by the use of an orange colour palette.**



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, especially for international tourism.

New Zealand residents view domestic tourism more favourably than international tourism. New Zealand's domestic TAR score of 62 (approval) is 11 points higher than its international TAR score of 51 (acceptance). However, the international TAR score has improved over the past two years.

80% of New Zealand residents personally benefited from tourism activity in their local area in the year ending December 2023. More than one third (37%) 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, 66% of New Zealand residents have been negatively impacted by tourism activity in their local area in some way. 29% have experienced more litter and waste generation and 23% 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 (22%).

Asked whether enough action is being taken to address the negative impacts of tourism, 71% agree that there is (the same result as the previous year). 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, 29% 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 (68%) 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.

Based on data from Q4 2023, 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 52). In terms of the impacts of tourism based on the four capitals, New Zealand residents think that tourism has the most positive impact on the economy while the most negative impact on the natural environment.

Two thirds of New Zealand residents are concerned about the impact that tourism could have on the natural environment. More than half would like to see more effort to educate visitors and locals on why they need to protect and preserve New Zealand, in order to mitigate environmental impacts of tourism.

Views on Tourism Snapshot: New Zealand Residents

Research was conducted between January 2023 and December 2023 using Angus & Associates' Views on Tourism programme. The sample includes n=3,173 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 benefits from tourism activity in their area, and the top 5 are...



More local businesses opening, or being able to stay open



Opportunities for employment & income



Inspired them to travel domestically



Opportunities to learn more about other cultures



Greater appreciation of the natural environment

66% of New Zealand residents have experienced adverse impacts from tourism activity in their area, and the top 5 are...



More litter and waste generation



Greater difficulty finding a car park



Takes longer to get to places due to traffic and congestion



Damage to the natural environment



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

The majority of New Zealand residents (92%) agree that international tourism is good for New Zealand and a slightly smaller proportion (86%) agree that international tourism is good for their region. These proportions are higher than they were in the previous year.

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 a quarter (27%) believe that international visitors put too much pressure on their region. However, the perception that international visitors put too much pressure on New Zealand has diminished in the latest 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 amongst Māori (at 43) and Chinese New Zealanders (at 38), as well as amongst those who live in rural areas (at 48) and those who have not travelled in the past 12 months (at 47).



International tourism is good for New Zealand



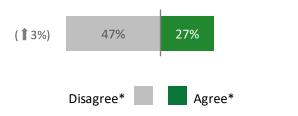
International tourism is good for <u>my region</u>



International visitors put too much pressure on New Zealand



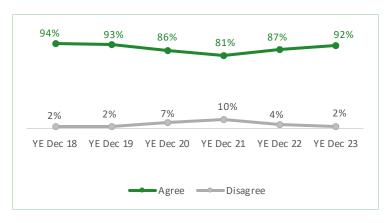
International visitors put too much pressure on my region



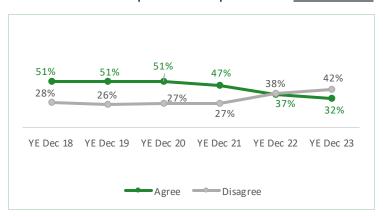
Base: Total sample - New Zealand residents n=3,173

INTERNATIONAL TOURISM

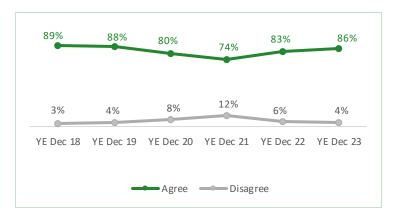
International tourism is good for New Zealand



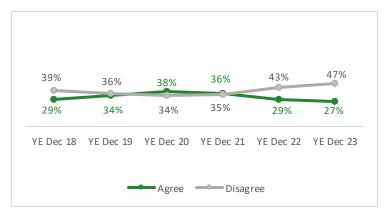
International visitors put too much pressure on New Zealand



International tourism is good for my region



International visitors put too much pressure on my region



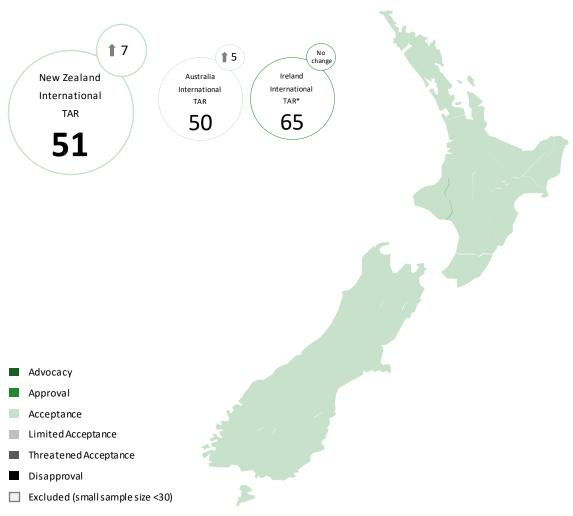
Base: Total sample - New Zealand residents: YE Dec 18 (n=2,509); YE Dec 19 (n=2,601); YE Dec 20 (n=3,034); YE Dec 21 (n=3,075); YE Dec 22 (n=3,192); YE Dec 23 (n=3,173)

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

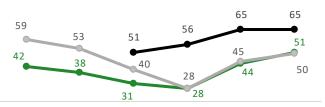
'Neither agree nor disagree' and 'Don't know' responses excluded



INTERNATIONAL TOURISM (CONT.)



Annual International TAR - Trend



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

Ireland (Apr-Sep only)

Region	International TAR	N=
Northland	58	119
Auckland	51	1,006
Waikato	51	302
Bay of Plenty/Gisborne/Hawke's Bay	51	363
Taranaki/Manawatū-Wanganui	51	252
Wellington	55	364
Tasman/Nelson/Marlborough/West Coast	43	118
Canterbury	48	417
Otago/Southland	48	232

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.



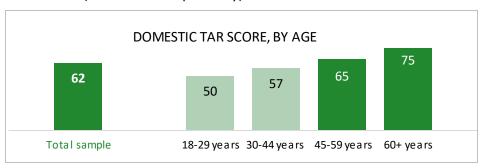
DOMESTIC TOURISM

The majority of New Zealand residents (93%) agree that domestic tourism is good for New Zealand and a similar proportion (91%) agree that domestic tourism is good for their region.

At the same time, one in five New Zealand residents (21%) believe that domestic tourism is putting too much pressure on New Zealand, and the same proportion (21%) 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 62 – this is 11 points higher than the international TAR score.

As for international tourism, support for domestic tourism has a correlation with age (older residents are more likely to be supportive). The domestic TAR score is also lower than it is for the total sample among those who have not travelled in the past 12 months (at 58). By ethnicity, it is lower than it is for the total sample amongst Māori (at 54), and Chinese and Indian New Zealanders (at 46 and 52 respectively).



Domestic tourism is good for New Zealand



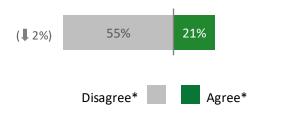
Domestic tourism is good for my region



Domestic visitors put too much pressure on New Zealand



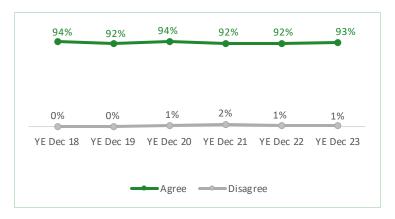
Domestic visitors put too much pressure on my region



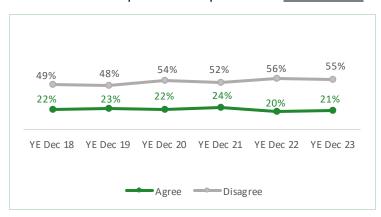
Base: Total sample - New Zealand residents n=3,173

DOMESTIC TOURISM

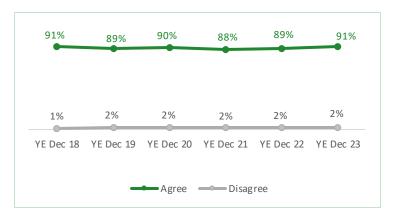
Domestic tourism is good for New Zealand



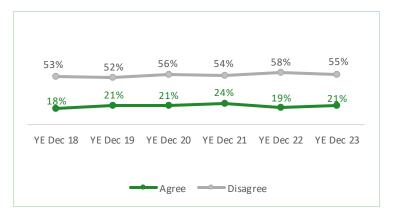
Domestic visitors put too much pressure on New Zealand



Domestic tourism is good for my region



Domestic visitors put too much pressure on my region



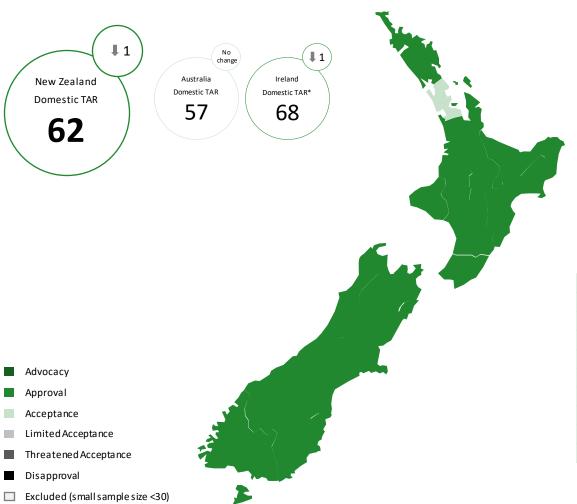
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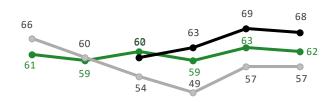
'Neither agree nor disagree' and 'Don't know' responses excluded



DOMESTIC TOURISM (CONT.)



Annual Domestic TAR - Trend



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

AU Ireland (Apr-Sep only)

Region	Domestic TAR	N=
Northland	64	119
Auckland	58	1,006
Waikato	63	302
Bay of Plenty/Gisborne/Hawke's Bay	63	363
Taranaki/Manawatū-Wanganui	64	252
Wellington	68	364
Tasman/Nelson/Marlborough/West Coast	60	118
Canterbury	65	417

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.



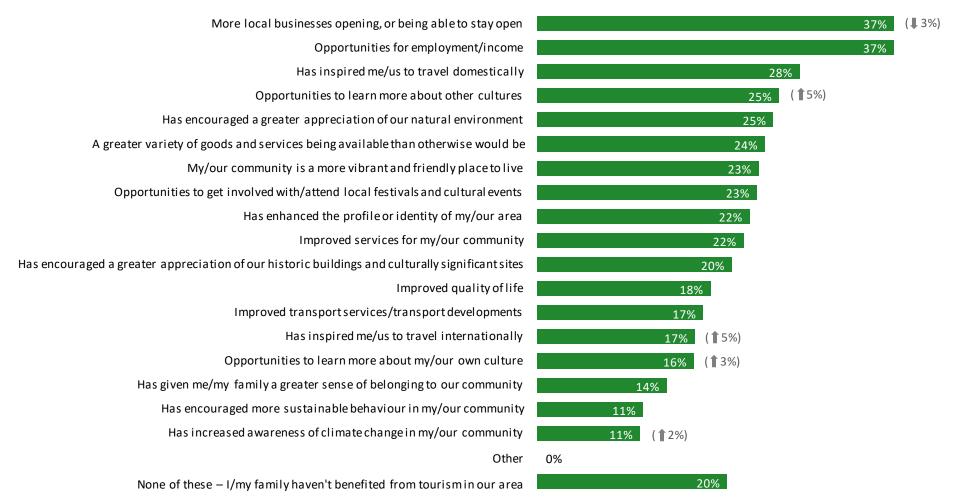
Otago/Southland



BENEFITS FROM TOURISM ACTIVITY IN LOCAL AREA

80% of New Zealand residents personally benefit from tourism activity in their local area in some way.

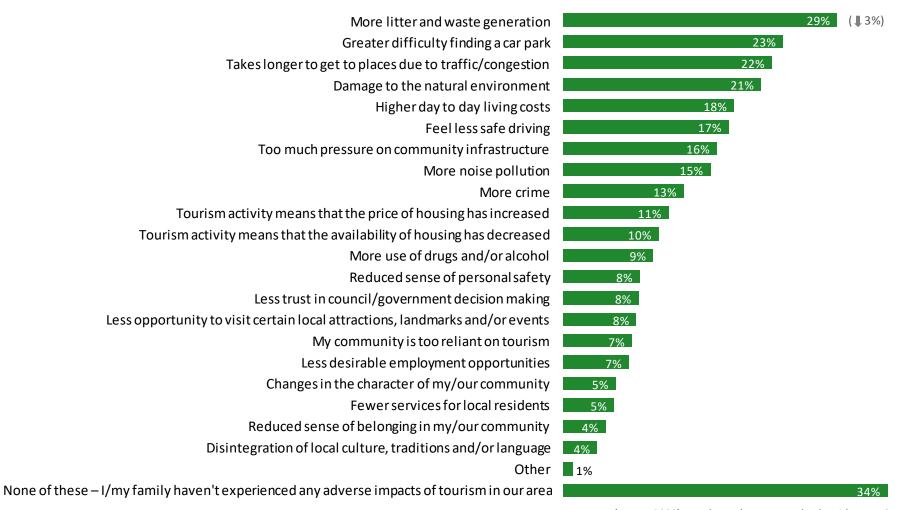
In which of the following ways, if any, would you say you/your family benefit from tourism activity in your local area?





NEGATIVE IMPACTS OF TOURISM ACTIVITY IN LOCAL AREA

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 (29%) 4% 21% Greater difficulty finding a car park (23%) 4% 16% Takes longer to get to places due to traffic/congestion (22%) 3% 16% Damage to the natural environment (21%) 3% 15% Higher day to day living costs (18%) 2% 13% Feel less safe driving (17%) 3% 12% Too much pressure on community infrastructure (16%) 3% 11% More noise pollution (15%) 11% More crime (13%) 2% 9% Tourism activity means that the price of housing has increased (11%) 8% Tourism activity means that the availability of housing has decreased (10%) More use of drugs and/or alcohol (9%) 7% Reduced sense of personal safety (8%) 6% **Disagree** enough action is being taken Less trust in council/government decision making (8%) 6% Agree enough action is being taken Less opportunity to visit certain local attractions, landmarks and/or events (8%) Neither agree nor disagree/Don't know My community is too reliant on tourism (7%) Less desirable employment opportunities (7%) 5%



IDEAS FOR BETTER ADDRESSING TOURISM NEGATIVE IMPACTS

COMMUNITY INFRASTRUCTURE

"Local roads are in a bad way there needs to be more road repairs done in my area, more resources need to be put into this."

"Stop listening to the woke community and fix our roads and footpaths so that tourists can travel on better roads and footpaths, and keep our toilet facilities cleaner, more often and open."

"Toilets are always rundown from overuse. Less tourists would help."

"Local councils could actively repair all the major potholes in my community, they are making it so unsafe for both pedestrians and drivers making it harder to get around the local area for both tourists and residents."

"Encourage visitors to use public transport."

"T2 lane on motorway"

"Time on parking in the shopping area should be for a short time only, not all day while visitors walk or ride bikes around the attractions."

"Stop closing or selling carparks"

"More road signage"

"Better public transport infrastructure, probably; particularly electric buses & trains, EV charging stations etc."

"People leaving plastic rubbish on the beach would be reduced if rubbish bins were more available."

LIVING COSTS

"Reduced costs/discounts for New Zealanders"

"Reduce and reverse inflation and enforce the reduction of the cost of goods and services."

"Local cards get priority."

"Help people get into their first home more"

SAFETY

"Prevent tourists from driving immediately after they arrive. Enforce an 8-hour break for sleep before driving."

"Info prior to arriving on road etiquette and rules"

NATURAL ENVIRONMENT

"High fines for littering"

"Wildlife need to be protected more with more laws"

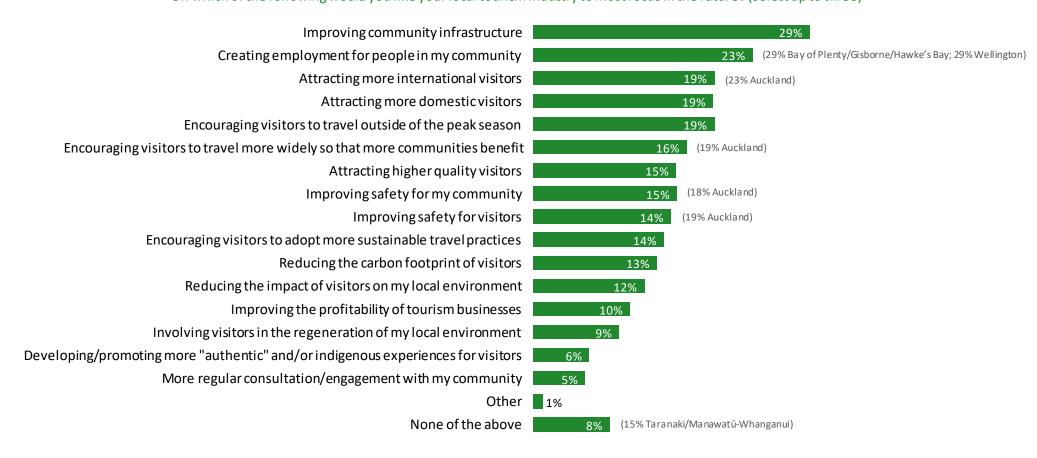
"If roading was better and there was less congestion then emissions would reduce."

"More trees to help reduce vehicle sound and pollution"



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 (Q4 2023)

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

Among those who commented on this question during August to December 2023, the most commonly mentioned themes include the recovery of tourism observed in the community, the number of tourists, and the need to provide more attractions/activities/offerings for visitors. Other themes identified related to 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.

"Great to have tourists back but infrastructure needs to be able to accommodate them."

"We need to boost tourism right up again to help with the economy."

"Seems to returning to normal with many visitors to our area."

"Our community needs more waste disposal & recycling options and more public toilets for visitors. The emptying of current waste bins and cleaning of toilets needs to increase to meet the demands of use."

"Would be nice if it was cheaper to travel around the country. Petrol and flights are so expensive."

"Many small businesses struggle to make it through, because we are too reliant on international visitors."

"The Westcoast South Island is dependent upon tourism, this place is so far behind the rest of new Zealand, it is ancient. They need an upgrade on everything, infrastructure and new council."

"Auckland is undergoing some big longer-term changes in travel in and around the city, which will have a very positive impact on how our city functions"

"More things should be built around the Wellington area."

"South Island tourism is still lagging behind North Island and there are hopes to recover in the coming year."

"Pleased it is starting to return to normal with overseas visitors. (Tourism) Helps the economy."

"After the pandemic, any tourism is good for New Zealand and my community. It brings back variety, vibrancy and friendliness to the community, while allowing jobs and businesses to be resume to what it was."

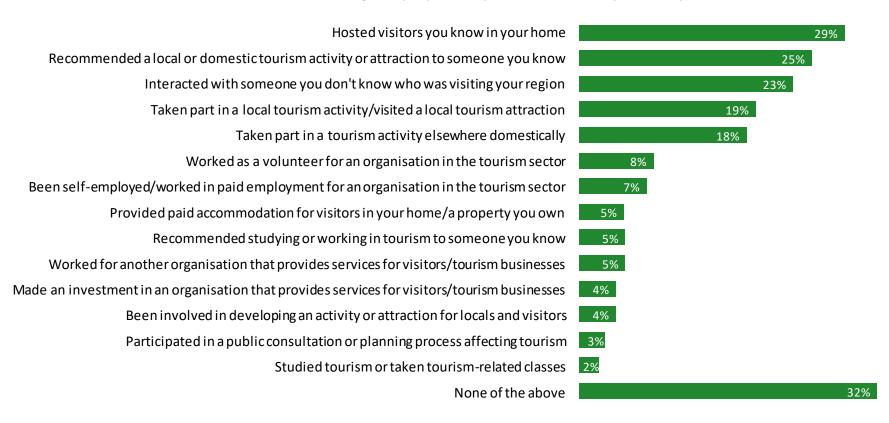
"Cruise ships are the biggest problem - cause congestion in places like Akaroa, crowded local bus services and they don't spend all that much as they eat on ship."





RESIDENT ENGAGEMENT ACTIONS WITH TOURISM/VISITORS

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





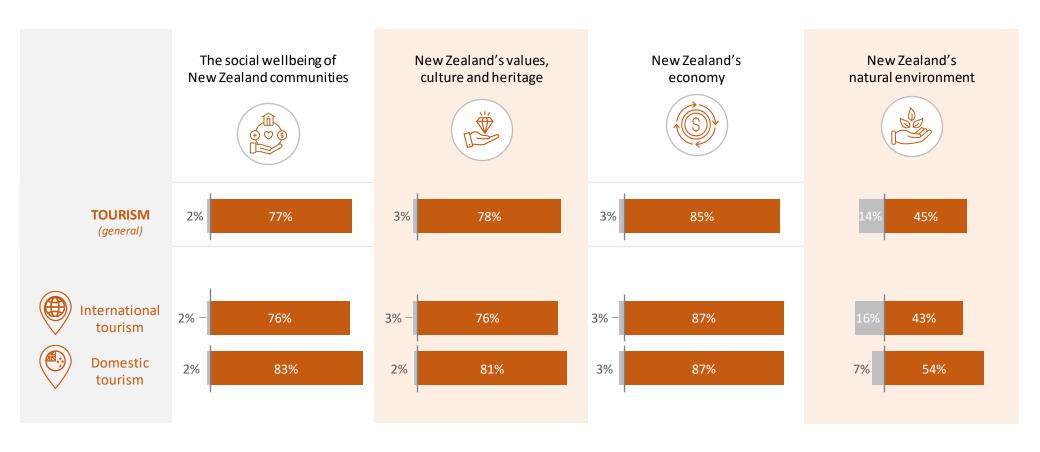




POSITIVE / NEGATIVE IMPACTS OF TOURISM

New Zealand residents think that 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*

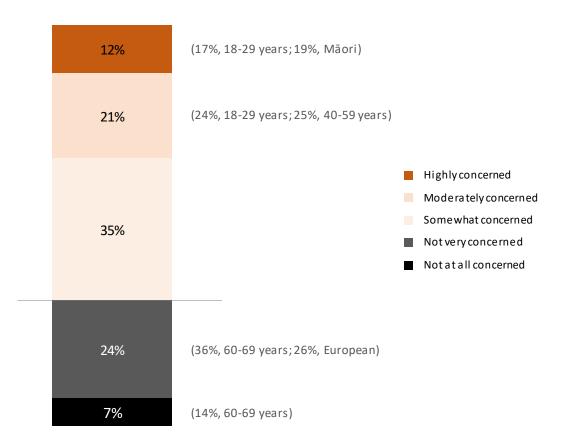
Positive*



CONCERN ABOUT ENVIRONMENTAL IMPACTS OF TOURISM

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

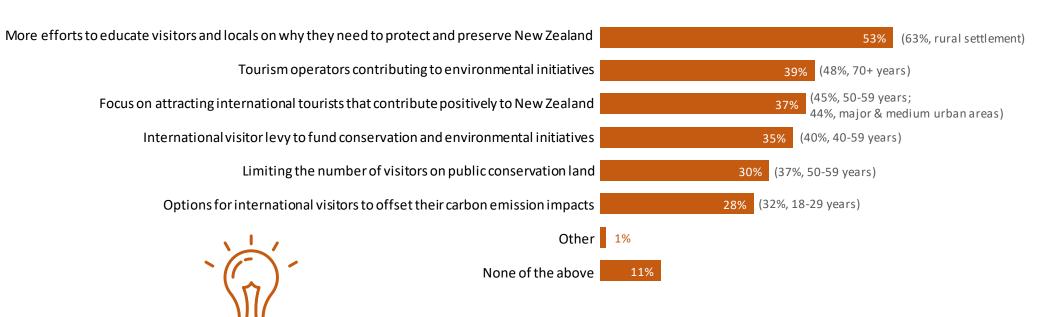






MEASURES TO MITIGATE ENVIRONMENTAL IMPACTS

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

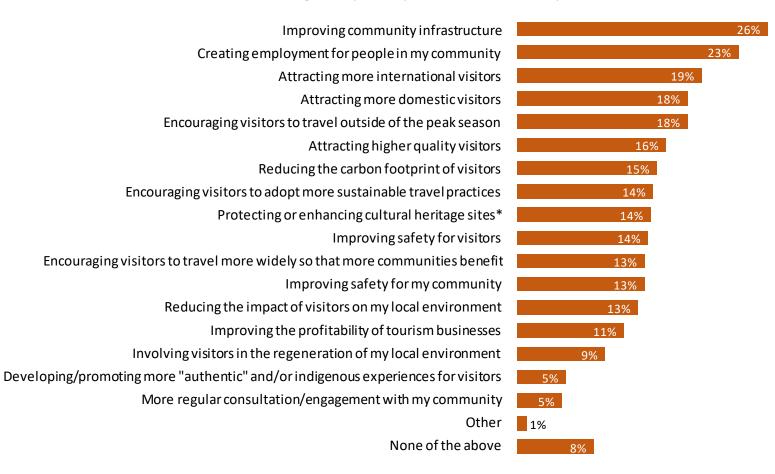






FUTURE FOCUS FOR TOURISM INDUSTRY

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







SAMPLE PROFILE

Gender	
Male	49%
Female	50%
Gender diverse / Prefer not to say	1%
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 around New Zealand	73%
Travelled to Australia	17%
Travelled overseas (outside of Australasia)	19%
Have not travelled	18%
Base: Total sample	n=3,173

Region	
Northland	4%
Auckland	32%
Waikato	10%
Bay of Plenty	7%
Gisborne	1%
Hawke's Bay	4%
Taranaki	3%
Manawatū-Whanganui	5%
Wellington (& Wairarapa)	11%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	1%
Canterbury	13%
Otago	5%
Southland	2%
Base: Total sample	n=3,173

Ethnicity	
New Zealand European	69%
Other European	6%
New Zealand Māori	12%
Cook Island Māori	1%
Indian	5%
Chinese	3%
PacificIslander	3%
Other	12%
Household Composition	
My husband, wife or partner	57%
My husband, wife or partner My mother and/or father	57% 7%
My mother and/or father	7%
My mother and/or father My child/children aged under 5	7% 12%
My mother and/or father My child/children aged under 5 My child/children aged 5 - 14	7% 12% 18%
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 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 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%

