VIEWS ON TOURISM RESEARCH

Queenstown

2024 - 2025

Resident sentiment toward tourism in the Queenstown region.

Destination Queenstown (DQ) and Lake Wānaka Tourism (LWT) are committed to supporting the tourism industry to be regenerative and resilient, delivering environmental, social, cultural, and economic benefits that enrich the lives of both residents and visitors. DQ and LWT conduct research annually among resident communities across the Queenstown Lakes District to understand public views and perceptions toward tourism. Research was conducted between October 2024 and March 2025 using Angus & Associates internationally respected Views on Tourism programme and methodology. For further details about methodology please refer to the information at the end of this resource.

QUEENSTOWN RESULTS

SUMMARY

Over the past two years, community sentiment towards both international and domestic tourism in Queenstown has declined and is currently at a level well below the NZ average. Residents are feeling the strain as post-pandemic visitor numbers return, compounding the pressure from rapid population growth. While many Queenstown residents (95%) have personally benefited from tourism activity in their local area, an almost equal majority (97%) have also been adversely impacted. Three out of four Queenstown residents (73%) agree that the region needs a destination management plan. Interestingly only two out of five residents knew about Queenstown Lakes' Destination Management Plan, Travel to a Thriving Future.

TOURISM APPROVAL RATING SCORE (TAR SCORE)

The TAR score highlights resident's overall perceptions of tourism.

19

OVERALL TOURISM TAR

21

INTERNATIONAL TAR

43

DOMESTIC TAR

RESIDENTS CONTINUE TO RECOGNISE THAT TOURISM PLAYS A POSITIVE ROLE IN THEIR REGION

Resident sentiment toward tourism remained positive, with over nine out of ten residents agreeing that tourism is good for their region, higher than the New Zealand result of 89% agreeing tourism is good for their region.

96%

Tourism is good for my region
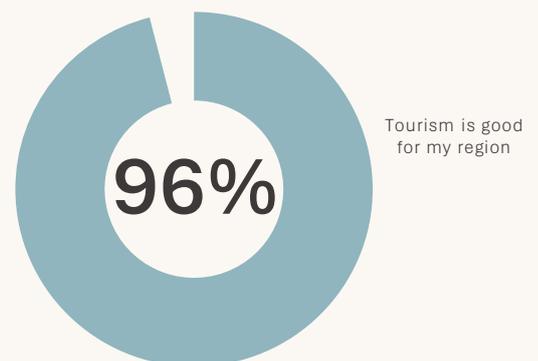
BUT EQUALLY RESIDENTS ARE CONCERNED ABOUT THE PRESSURE VISITORS ARE PLACING ON THEIR REGION

While tourism is generally seen as a force for good, concerns have been raised amount the perceived amount of pressure visitors place on their region, with almost eight out of ten reporting that they believe that tourism is exerting too much pressure. This significantly higher than the New Zealand result of 30% believing visitors are putting too much pressure on their region.

78%

Visitors are putting too much pressure on my region
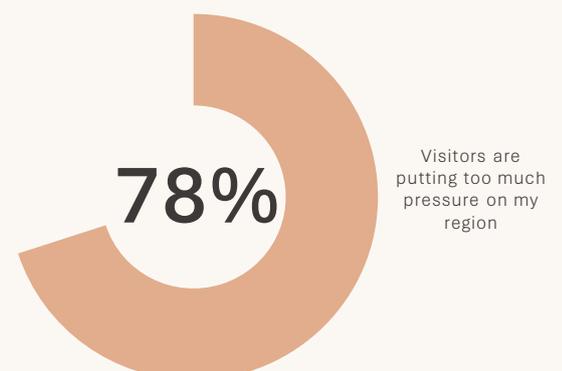
95% OF RESIDENTS HAVE EXPERIENCED BENEFITS OF TOURISM IN THEIR AREA

This proportion is significantly higher than the New Zealand benchmark (81%).

THE TOP FIVE BENEFITS ARE...

- Opportunities for employment and income (62%)
- More local businesses opening or being able to stay open (60%)
- A greater variety of goods and services being available than otherwise would be (49%)
- Community is more vibrant and friendly place to live (46%)
- Has enhanced the profile or identity of my/ our area (39%

97% OF RESIDENTS HAVE EXPERIENCED ADVERSE IMPACTS OF TOURISM IN THEIR AREA

This proportion is significantly higher than the New Zealand benchmark (71%).

THE TOP FIVE ADVERSE IMPACTS ARE...

- Takes longer to get places due to traffic and congestion (78%)
- Greater difficulty finding a car park (71%)
- Too much pressure on community infrastructure (67%)
- Higher day to day costs (55%)
- Feel less safe driving (57%)

TOURISM APPROVAL RATING SCORE (TAR)

The TAR score highlights resident's overall perceptions of tourism. It is a composite index score based on several responses about tourism's benefits and adverse impacts. TAR score is plotted on a scale from <0 to +100 ranging from advocacy to disapproval to track residents' perceptions over time, and there are separate scores for sentiment toward domestic and international visitors.
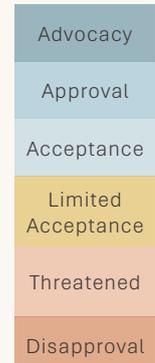
TOURISM (OVERALL) TAR

QUEENSTOWN	19
OTAGO	39
NEW ZEALAND	48

DOMESTIC TAR

QUEENSTOWN	43
OTAGO	57
NEW ZEALAND	57

INTERNATIONAL TAR

QUEENSTOWN	21
OTAGO	34
NEW ZEALAND	47

Advocacy
Approval
Acceptance
Limited Acceptance
Threatened
Disapproval

TOURISM APPROVAL RATING SCORE (TAR) COMPARED TO NEW ZEALAND

DOMESTIC TAR

Queenstown: 68, 51, 44, 43
New Zealand: 59, 64, 61, 57
(21/22, 22/23, 23/24, 24/25)

INTERNATIONAL TAR

Queenstown: 30, 28, 20, 21
New Zealand: 28, 48, 50, 47
(21/22, 22/23, 23/24, 24/25)
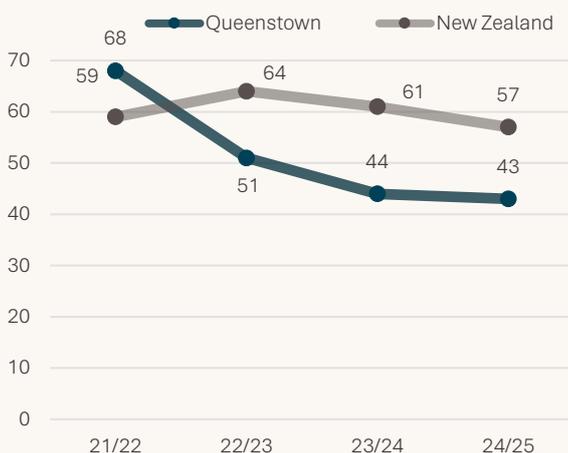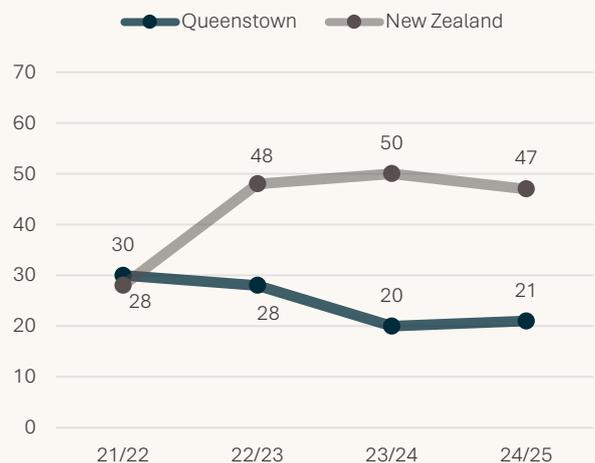
WHAT DO OUR RESIDENTS WANT FROM TOURISM?

AREAS OF FOCUS FOR TOURISM

Looking to the future, three out of five Queenstown residents would like the local tourism industry to focus most on improving community infrastructure. Other priorities include attracting higher quality visitors, encouraging visitors to travel outside of the peak season and reducing the impact of visitors on the local environment.
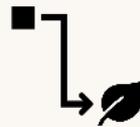
| Improving infrastructure | Attracting higher quality visitors | Encourage visitors to travel outside of the peak | Reducing the impact of visitors on the local environment | Encouraging visitor dispersal to benefit more communities | Promoting sustainable travel practices |

RESIDENTS RECOGNISE THE NEED FOR AN EFFECTIVELY IMPLEMENTED DESTINATION MANAGEMENT PLAN (DMP).

Three out of four Queenstown residents (73%) agree that the region needs a destination management plan. Interestingly only two out of five residents new about Queenstown Lakes' Destination Management Plan, Travel to a Thriving Future.

73% of residents agree that the region needs a DMP
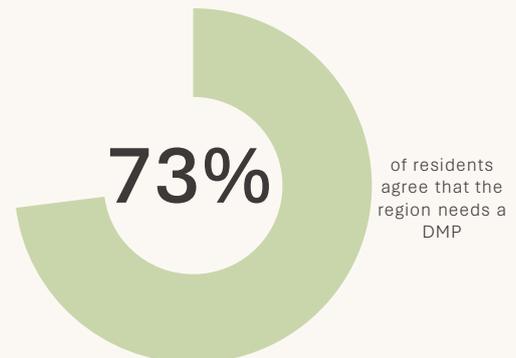
WHY THIS RESEARCH IS CONDUCTED

The success of a regenerative and sustainable destination depends on both the benefits tourism brings and the strength of local community support.

The Queenstown Lakes District tourism industry is committed to ensuring its operations are regenerative and resilient, delivering benefits environmentally, socially, culturally and economically, enriching the lives of the people who live here and the people who visit.

A welcoming community and ability to provide authentic Manaakitaka (hospitality), is vital. Monitoring resident attitudes and perceptions towards tourism through this research is key to guiding the industry's ongoing development.

INTERESTED TO LEARN MORE ABOUT THE FUTURE OF THE TOURISM INDUSTRY IN THE QUEENSTOWN LAKES DISTRICT?

Learn more about Queenstown Lakes' Destination Management plan, Travel to a Thriving Future.

Travel to a thriving future
Haereka whakamua ki to ao taurikura

A Regenerative Tourism Plan
Te Mahere Whakahaumanu Tāpoi

This is the district's roadmap to ensuring our district remains a special place for future generations, and a place we can continue to be proud to share with visitors for years to come.

METHODOLOGY

This report presents findings from research conducted in the Queenstown Lakes District between October 2024 and March 2025. It builds on three previous waves of research conducted during the same period over the past three years.

The research was based on Angus & Associates' Views on Tourism® methodology[1]. Core questions explored residents' views on the value of international and domestic tourism, as well as tourism's positive and negative impacts on the community. These were supplemented with a small set of questions tailored to the Queenstown Lakes District.

Queenstown Lakes District residents' responses are compared with those of a nationally representative sample of New Zealanders aged 18 and over (the NZ Benchmark'), who completed the Views on Tourism® survey during the same period. The national sample comprised of n=1,516 participants.

The Queenstown Lakes District sample included n=519 residents (Queenstown residents n=251; Wānaka residents n=268). Participants were recruited through intercepts at various local sites, including libraries, recreation centres, supermarkets, retail stores, and markets. Experienced Angus & Associates' researchers conducted the fieldwork, with site selection ensuring broad community representation across the Queenstown Lakes District.

Residents were invited to complete the survey on-site or receive a link via email. They could scan a QR code to use their own device or complete the survey on a tablet provided. This approach aimed to maximise accessibility and convenience.

As an incentive, participants could enter a prize draw to win their choice of either a Lasting Legacy Pack (five native trees planted in the Queenstown Lakes District on their behalf with Trees that Count and a $150 donation made in their name to Love Queenstown / Love Wānaka), or a selection of organic wines from Amisfield shipped to their door. All respondents were aged 18 or older. Following quality control and data cleaning, the final sample was weighted to reflect the Queenstown Lakes District's adult population by sub-area, age, and gender, using 2023 Census usual resident counts.

Throughout the report, blue and red arrows/font highlight statistically significant differences between Queenstown Lakes District results and the national benchmark, and year-on-year changes. Significance is reported at the 95% confidence level.

Tourism Approval Rating: A Tourism Approval Rating (TAR) is calculated for both international and domestic tourism, using a combination of tourism perception scores. The TAR is plotted on a six-section scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' perceptions of tourism on an ongoing basis.

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1. Destination Queenstown and Lake Wānaka Tourism use Angus & Associates Views on Tourism Research Methodology

SAMPLE PROFILE

	Queenstown	Queenstown Lakes District
Gender		
Male	44%	42%
Female	55%	57%
Gender Diverse	1%	1%
Prefer not to say	0%	1%
Age		
18 – 19 years	1%	1%
20 – 29 years	12%	10%
30 – 39 years	34%	28%
40 - 49 years	18%	20%
50 – 59 years	16%	16%
60 – 69 years	10%	13%
70+ years	8%	13%
Travel in Past 12 Months		
Travelled in New Zealand	65%	68%
Travelled outside New Zealand	63%	61%
Have not travelled	6%	6%
Base: Total Sample (unweighted)	n=251	n=519

	Queenstown	Queenstown Lakes District
Queenstown Lakes District		
Central Queenstown	29%	14%
Arrowtown, Arthurs Point, Whakatipu Basin	24%	12%
Frankton and surrounding suburbs	45%	22%
Outer Whakatipu	2%	1%
Wānaka	-	39%
Lake Hāwea	-	8%
Outer Wānaka	-	5%
Ethnicity		
New Zealand European	53%	65%
Other European	26%	21%
New Zealand Māori	4%	3%
South American	4%	3%
Latin American	3%	1%
North American	3%	2%
Chinese	2%	2%
Other	8%	7%
Prefer not to say	2%	2%
Base: Total Sample (unweighted)	n=251	n=519

	Queenstown	Queenstown Lakes District
Occupation		
Employed full-time in paid work	56%	47%
Employed part-time in paid work	14%	16%
Unpaid/volunteer work	2%	4%
Self-employed	21%	22%
Studying	0%	1%
Looking after family and/or home	4%	5%
Looking for work or unemployed	1%	1%
Retired	11%	16%
Beneficiary	1%	1%
Other	1%	1%
Household Composition		
My husband, wife or partner	71%	74%
My mother and/or father	2%	2%
My child/children aged under 5	12%	11%
My child/children aged 5 - 14	17%	20%
My child/children aged 15+	8%	8%
Other family/relatives	3%	4%
Other person(s)	23%	18%
None of the above - I live alone	7%	8%
Prefer not to say	2%	3%
Base: Total Sample (unweighted)	n=251	n=519

	Queenstown	Queenstown Lakes District
Administrative and support services	11%	10%
Agriculture, foresty and fishing	1%	3%
Arts and recreation services	3%	4%
Construction	12%	11%
Education and training	6%	7%
Electricity, gas, water and waste services	1%	1%
Financial and insurance services	3%	3%
Health care and social assistance	12%	11%
Information media & telecommunications	1%	3%
Manufacturing	1%	2%
Mining	0%	0%
Professional, scientific & technical services	8%	9%
Public administration and safety	2%	2%
Rental, hiring and real estate services	3%	2%
Retail trade	8%	10%
Tourism incl. accommodation & hospitality	30%	25%
Transport, post and warehousing	2%	2%
Wholesale trade	2%	2%
Other	7%	8%
Base: Employed (paid) or Self-employed	n=251	n=519