



Hospitality & Tourism Employment

STRENGTHENING FUTURES 2025





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“ I enjoy working
with people,
creating positive
experiences, and
being part of **an
industry that’s
vibrant and always
changing** ”



Executive Summary

The hospitality and tourism workforce stands at an important juncture. Long-standing employment models are being tested against rising expectations for decent work and careers. This report examines how employment conditions are evolving in ways that directly impact the sector's ability to strengthen futures for both individual workers and the industry.

Drawing on 2025 data benchmarked against 2024 and 2022, the analysis reveals where the workforce is gaining ground and where systemic pressures persist. While attitudes towards productivity and profitability remain strong and workplace dignity continues to improve, key employment conditions show concerning trends: perceptions of fair pay have declined, experiences of workplace bullying have risen, and over one-third of workers intend to leave their organisations in the next twelve months.

Priority areas provide insight into where targeted investment can strengthen retention and where critical gaps require attention to secure sustainable employment across the sector: career commitment patterns, education pathways, pay adequacy, customer abuse, neurodivergent worker experiences, AI adoption readiness, and training access.



■ EXECUTIVE SUMMARY

Progress and Stability

PRODUCTIVITY AND ENGAGEMENT

In 2025, workforce attitudes toward productivity and organisational profitability remain strong, though slightly lower than in 2024. Tourism workers report marginally stronger productivity orientations, while awareness of financial realities is highest among managers, older employees, higher earners, and those with longer tenure or higher qualifications.

Work engagement is notably higher among employees with people-management responsibilities and within tourism businesses, both outperforming hospitality counterparts. Engagement peaks in very small and medium-sized organisations and rises sharply with tenure and age, climbing from low levels among newer and younger workers to very high engagement among long-serving and older employees.

- **83%** care about being productive in their jobs (91% in 2024)
- **75%** agree that organisational profitability matters (76% in 2024)
- **87%** felt they had the skills to do their jobs with confidence (90% for 2024)
- The average agreement rate across nine workplace engagement items was **64%**.
- Reported workplace dignity continued to improve, reaching **68% in 2025**, up from 62% in 2022 and 67.5% in 2024.
- Overall workplace dignity and job satisfaction remained stable at **68% in 2025**, matching 2024 and exceeding 2022 levels (62%).
- Respondents who reported they enjoyed their work were **72%**, as was the case in 2024 vs 70% in 2022.

“ Large numbers of casual staff take skill to manage so that **everyone feels included and valued**. This doesn't always occur due to lack of leadership training and support ”



TRAINING AND PROMOTION

Opportunities for training and advancement have improved markedly in 2025. The proportion of respondents rating training opportunities as good rose to 62%, up from 57% in 2024 and 41% in 2022. Demand for further training remains strong, with 70% wanting more, compared with 60% last year. Perceptions of promotion prospects also increased, reaching 53% in 2025 (up from 48% in 2024 and 42% in 2022).

Training access and promotion opportunities are shaped primarily by structural and organisational factors, such as sector, managerial responsibility, workplace size, tenure, and remuneration, rather than by individual characteristics alone, suggesting that organisational context plays a decisive role in determining who receives development opportunities and who progresses within the workforce.

CAREER COMMITMENT

Commitment to a career in hospitality and tourism remains moderate, with an average positive response of **57%**. Most employees express strong attachment to the industry, with **63%** stating they would choose the same career again and **62%** definitely want a future in the sector. Key drivers of career commitment (and inhibitors of turnover) include access to training, promotion opportunities, fair pay, and perceived dignity in the workplace.

63% “ If I could do it all over again, I would still choose to work in the hospitality and tourism industry ”

62% **Definitely want a career in the hospitality and tourism industry**

■ EXECUTIVE SUMMARY

EDUCATION

Educational attainment continues to rise, with the proportion of respondents holding a bachelor's degree increasing to **30%**, up from 28% (2024) and 25% (2023). Postgraduate qualifications have remained relatively stable over the same period, at approximately 10–12%.

NEURODIVERSITY

In 2025, **24%** of respondents identified as neurodivergent, with an additional 13% responding as unsure. This marks a significant increase from 2024, when 15% identified as neurodivergent and 10% were uncertain, potentially indicating increased diagnosis and recognition within the workforce.

AI ADOPTION

AI use in hospitality and tourism is emerging but limited, with **one in three** employees reporting any use of AI at work. Organisational support is also weak, with **51%** of employees indicate that managers do not provide resources for AI-related initiatives.

AI uptake is higher in large, urban workplaces, particularly among managers, tourism businesses, and employees with postgraduate qualifications (44%). Clear equity gaps remain, with Māori and Pacific Peoples reporting lower adoption than New Zealand Europeans, while respondents from Other Asian groups report the highest levels of use.

Navigating Challenges

Despite areas of progress, challenges around fair pay, workforce retention, and employee wellbeing continue to pose material risks for the sector. At the same time, the findings point to clear opportunities for improvement. Addressing pay adequacy, career stability, wellbeing, and inclusion will be central to strengthening the future of the hospitality and tourism workforce.

PAY AND CONDITIONS

In 2025, most respondents (59%) were in permanent full-time roles, with 26% in permanent part-time and 10% in casual or on-call positions, reflecting only minor shifts since 2022. Salaries account for 37% of pay arrangements, while 63% are hourly paid, with mean actual hours worked at 33.3 per week. Average salary is \$80,101 and mean hourly rates are \$42.78 for salaried staff and \$27.72 for hourly workers.

Despite these figures, only **48%** feel they are paid fairly (a decline from **57%** in 2024), while 57% earn below the 2025/26 Living Wage of \$28.95 (from 1 September 2025) and **8%** report pay below the Minimum Wage. Additionally, **36%** say they experience pressure not to claim entitlements such as sick leave or travel expenses.

29%

OUR MANAGERS SUPPORT US BY PROVIDING
staff resources,
funding, and
operational materials
for AI initiatives



48%

OF RESPONDENTS
feel they are
paid fairly



■ EXECUTIVE SUMMARY

CAREER WITHDRAWAL

Between 39% and 44% of respondents agreed with statements about leaving the hospitality and tourism sector entirely. When combined into a yes-no measure, **42%** were classified as intending to leave the sector.

ORGANISATIONAL TURNOVER INTENTION

Between 41% and 45% of employees intend to leave their organisation. When combined into a yes/no measure, **43%** show turnover intention, with no difference between managers and non-managers. This has increased from 28% in 2022 and 32% in 2024.

BULLYING AND HARASSMENT

Reports of negative workplace experiences have risen sharply in 2025, with **35%** of respondents reporting personal experiences of bullying or harassment at work, up from 23% in previous surveys. Customers are the main offenders of bullying and harassment experienced. Incidents witnessed by others also increased to **36%**, compared with 32% in 2024 and 34% in 2022, signalling a growing concern for workplace culture and safety.

BURNOUT

Indicators of burnout remain high across the workforce. **Two-thirds of respondents** (66%) reported feeling tired as a result of their service work, while more severe psychological strain is also evident. Around 43% reported feelings of hopelessness associated with working with customers, and 45% indicated they experience intrusive thoughts after difficult customer interactions.

NEURODIVERSITY SUPPORT

Less than one-third of all respondents report their organisation actively raises neurodiversity awareness (27%) or improves employment practices (28%).

ENVIRONMENTAL SUSTAINABILITY

In 2025, **just over half of respondents** report that their organisation's values align with their own, particularly regarding environmental sustainability, with 51% and 54% agreeing on two related measures. This indicates moderate but meaningful alignment between personal and organisational priorities.



Most employees care strongly about being **productive (83%)**



and supporting **organisational profitability (75%),**



while just over half feel they **have opportunities** for promotion and career progression **(53%)**

■ COHORTS OF INTEREST



Neurodivergent Workers

In 2025, 24% of respondents identify as neurodivergent (up from 15% in 2024), with a further 13% unsure. Neurodivergent workers report markedly lower workplace dignity and job satisfaction, higher turnover intention, and elevated burnout. They experience more than double the rate of work-related bullying compared with neurotypical workers (50% vs 24%).



Young Workers (Under 25)

Young workers comprise 18% of the workforce, down from 38% in 2024. This group shows the highest levels of turnover intention (54%), career withdrawal, and burnout. Only 41% report having promotion opportunities, compared with 57% of those aged 45–54. Younger workers also report the lowest levels of workplace dignity and job satisfaction of any age group.



Small-organisation Employees (1-5 Staff)

Employees in very small organisations account for 9% of respondents, down from 13.5% in 2024. They report less access to training and promotion than those in larger organisations and mixed experiences of pay and conditions. However, they also report the lowest rates of work-related bullying (16%) and turnover intention (20%), suggesting that despite limited formal supports, very small workplaces may offer greater stability and lower conflict.



Hospitality vs Tourism Workers

Hospitality workers reported experiencing higher levels of personal bullying and harassment compared with tourism workers (39% vs 27%, respectively). A similar pattern was observed for work-related bullying behaviours, with higher reported prevalence among hospitality workers than tourism workers (31% vs 23%). Hospitality workers also had higher turnover intention (40% vs 31%) compared with tourism workers. By comparison, tourism workers report stronger engagement, slightly higher productivity, greater access to training (69% vs 58%), and better promotion opportunities, indicating more supportive development pathways.



Managers vs Front-line Workers

In 2025, 45% of respondents report managing staff, down from 49% in 2024. Frontline workers are far more likely than managers to earn below the Living Wage, report lower job satisfaction, and experience elevated burnout. Managers, by contrast, report higher exposure to work-related bullying (30% vs 25%) but greater access to training (69% vs 58%).



Long-tenure vs Short-tenure Workers

A clear stability gradient is evident: turnover intention affects nearly half of workers with under three years' tenure (47–49%), compared with just 14% among those with more than 20 years' service. Engagement and training participation rise sharply with tenure, while burnout is concentrated among newer workers. Long-tenure employees show the strongest career commitment and retention.

01

Momentum: What's working?



Motivation remains high

80% are passionate about doing their job, 83% care about being productive and 75% care about organisational profitability.



Workplace dignity

Agreement across five workplace dignity and job-satisfaction indicators averaged 68%, indicating a sustained upward trend from 2022 (62%) through 2024 (67.5%).



Training access shows real gains

62% now rate training opportunities as good (up from 41% in 2022), yet 70% still want more training.



AI adoption is emerging

Around 33% use AI at work, yet only 29% report managerial support. Uptake is concentrated among managers, tourism roles, and higher-paid workers.



Education levels are rising

30% now hold a bachelor's degree (up from 25% in 2023), with a further 10% holding postgraduate qualifications

02 Gaps: Who gets left behind?



Turnover and wellbeing risks are unevenly distributed

Intentions to leave are concentrated among younger, short-tenure employees, especially in hospitality. Older, long-tenured workers show much stronger stability.



Progression depends on structure, not effort alone

Only 53% report promotion opportunities, shaped mainly by sector, pay, tenure, workplace size, and managerial role.



Neurodiversity visibility is rising faster than support

24% identify as neurodivergent (up from 15% in 2024), but just 38% report active organisational support.

03 Retention Risk: Where pressure builds



People leave because of conditions, not the work itself

Low pay, long or unsustainable hours, and limited career progression are the strongest drivers of exit, even among workers who enjoy hospitality and tourism.



Career commitment is moderate, not secure

While 63% would choose the industry again and 62% want a future in it, overall career commitment averages 57%.



Experience anchors people to the sector

Engagement, training, and retention rise sharply with age and tenure, while turnover intentions are concentrated among younger, short-tenure workers



Fair pay perceptions are slipping

Just 48% of workers feel they are paid fairly in 2025, down from 57% in 2024, returning to 2022 levels.



Introduction

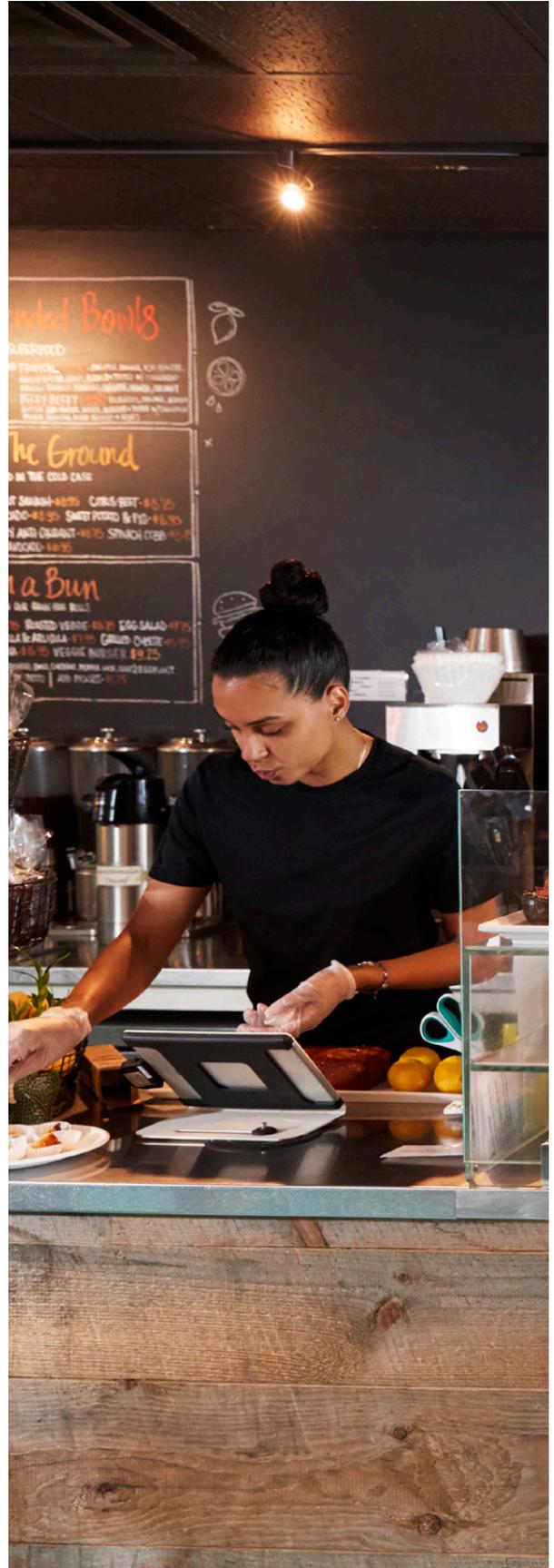
Hospitality and tourism deliver substantial economic and social value to Aotearoa New Zealand, remaining central to how the country welcomes the world. Those who work in hospitality and tourism create memorable experiences for visitors and locals alike. Their contribution is visible in the energy of cafés and restaurants, the professionalism of accommodation and attractions, and the manaakitanga shown across regions. More than a sector, hospitality and tourism represent a tangible expression of New Zealand's reputation for warmth, care, and high-quality service.

The scale of this contribution is significant. Tourism as a whole supports 303,420 jobs, representing 10.7% of workers nationwide (Stats NZ, 2025a). Hospitality including accommodation directly employs 193,000 people and supports a further 28,000 supplier-linked jobs, bringing total jobs supported to 221,440, or 7.7% of nationwide employment (Hospitality New Zealand, 2025). Tourism's combined direct and indirect contribution to GDP rose to \$28.7 billion (excluding GST and imports sold to tourists) and accounts for 7.5% of national GDP, underscoring the sector's ongoing economic importance (Stats NZ, 2025a).

80% **AGREE**
"I am passionate about doing my job"

New Zealand's visitor economy is continuing to recover to its pre-Covid levels of visitor volumes and value. The Tourism Satellite Account reported total tourism expenditure of \$44.4 billion (including GST and imports sold to tourists) for the year ending March 2024, a 14.6% increase on the previous year (Stats NZ, 2025a). Overseas visitor arrivals reached 3.45 million in the year to October 2025, reflecting returning global demand and the continued strength of New Zealand's tourism brand (Stats NZ, 2025c).

Hospitality revenues also strengthened, reflecting increased visitor activity and domestic spending (Restaurant Association of New Zealand, 2025). The Retail Trade Survey (Stats NZ, 2025b) for the year ending March 25 showed hospitality sales were \$21.2 billion, which is a 1% increase in hospitality industries.



■ INTRODUCTION

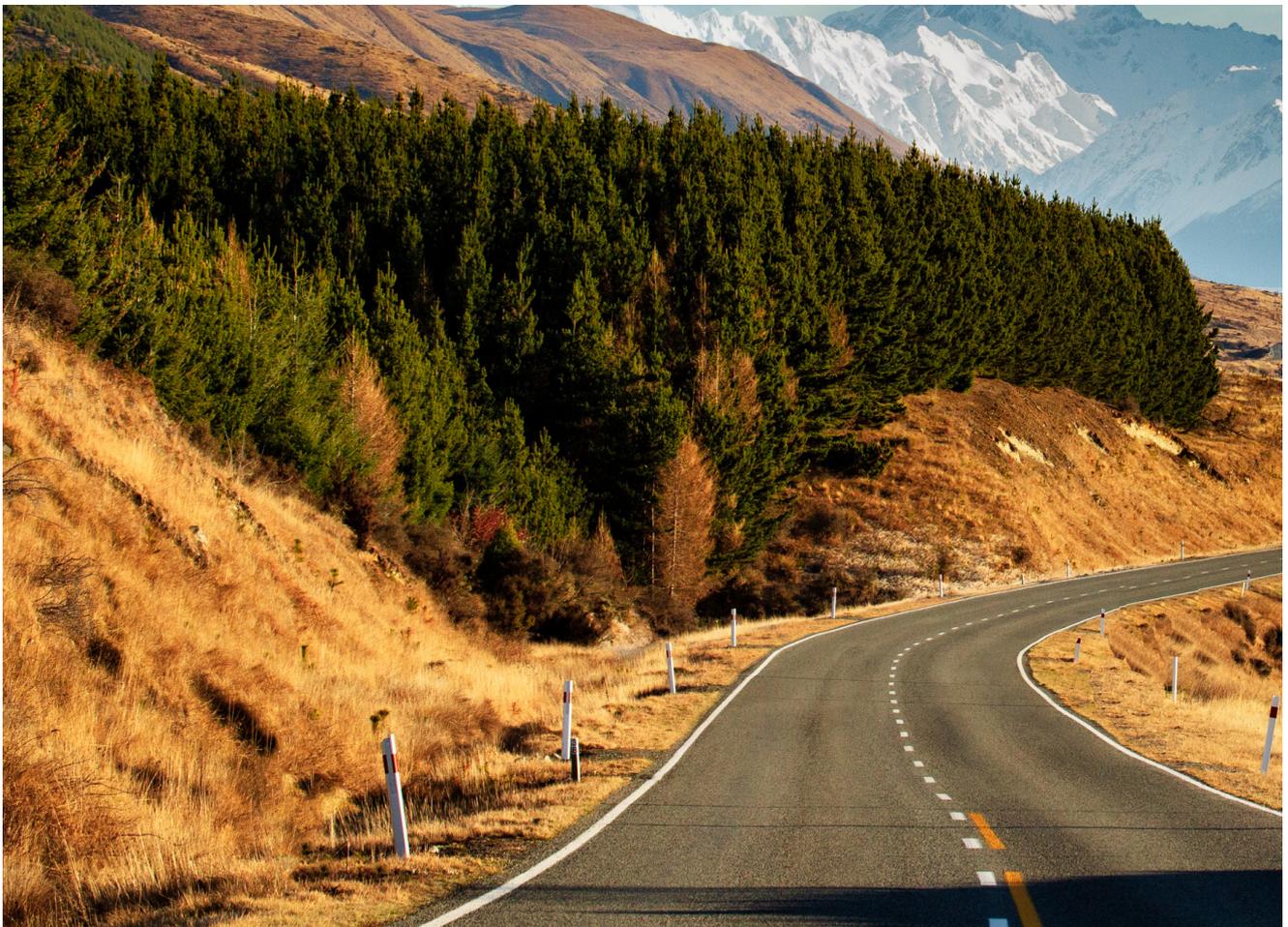
For context, core industries total increased 0.33% in the same time period. Complementary data for the year to June 2025 report \$15.99 billion in revenue across core sub-sectors such as restaurants, cafés, and bars (Restaurant Association of New Zealand, 2025). Together, these figures show a sector regaining momentum while navigating increased operating costs, shifts in consumer behaviour, and continued pressure on margins.

Hospitality and tourism serve as crucial points of entry into the labour market, particularly for young people. The sector plays an important role in building transferable skills, offering progression pathways, and supporting regional economies. For many workers, hospitality and tourism provide a foundation for future careers across a wide range of industries.

This high level of intrinsic motivation highlights the strength of worker commitment across the sector. However, it also sharpens the significance of ongoing workforce challenges. Despite renewed growth, labour

demand continues to exceed supply in many areas, and pressures related to pay, wellbeing, and retention remain prominent for both workers and employers. These dynamics reinforce the importance of robust, longitudinal evidence on employment conditions, workplace experiences, and organisational capability during periods of sector expansion.

This new research, **Hospitality and Tourism Employment Report: Strengthening Futures (2025)**, commissioned by the Ministry of Business, Innovation and Employment, builds on earlier national surveys, including Hospitality and Tourism Employment Report: Rebounds and Roads Forward (2024) (Williamson & Harris, 2024) and He Tangata: A Research Report on Tourism and Hospitality Employment Conditions in New Zealand (Williamson & Rasmussen, 2022). By providing updated insights into employment conditions and employee wellbeing, the 2025 report strengthens the evidence base needed to support sustainable, high-quality hospitality and tourism employment across Aotearoa New Zealand.



■ INTRODUCTION

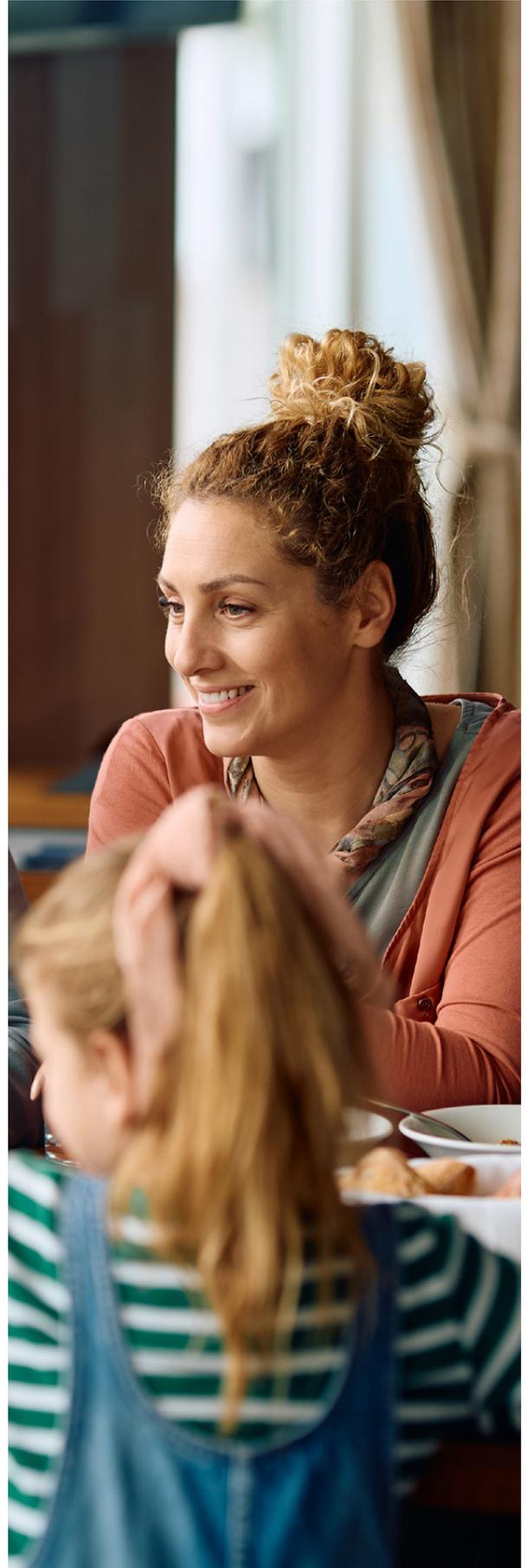
Research Design

The 2025 New Zealand Hospitality and Tourism Employment Survey was conducted from 14 October to 23 November 2025. The survey was based on the previous 2024 Rebound and Roads Forward survey (Williamson & Harris, 2024). The 2025 survey is significantly larger and more detailed than the previous surveys, with 57 questions - including 17 quantitative scales - made up of 91 items. The introduction of new questions reflects sector feedback and the ever-changing New Zealand workforce. Core questions from the 2022 and 2024 surveys were retained to enable comparison with the data collected in 2025.

A survey information sheet and an anonymous link to complete the Qualtrics XM survey were distributed via email and social media using a combination of established AUT industry networks and industry partners. At the conclusion of the survey, 1,013 participant responses were analysed using SPSS version 29. Rigorous data cleaning resulted in a final respondent number of 957. This respondent count is consistent with the previous 2022 and 2024 surveys, which recorded 902 and 1,031 respondents respectively. Descriptive statistics and comparisons of means were conducted to summarise the respondent feedback and identify trends.

During the data analysis, the 2022 and 2024 survey reports were used as benchmarks to guide presentation and cross-check results. The overall respondent numbers, demographics and findings are highly consistent with both previous reports, which illustrates the quality of the data and the robustness of the findings.

Where results are presented, the sample size is 957 unless otherwise specified. Figures in the report have been rounded for clarity. Results in tables may not equal 100%. Respondent comments are presented verbatim but, where appropriate, have been edited for readability. Ethical approval was granted by the Auckland University of Technology Ethics Committee on 7 October 2025 (Number 25/334).



Demographic Information

The demographic data is very consistent across the three iterations of the Hospitality and Tourism survey. In terms of gender, age, and ethnicity, the surveys show no significant variation from 2022 to 2025. The location of respondents is also similar across the three surveys, with four main centres and Queenstown district making up 71% of respondents in 2025, 68% in 2024, and 78% in 2022.

2022, 2024, 2025 COMPARISON: EMPLOYEES BY SECTOR: GROUPED

This section compares the distribution of respondents across hospitality and tourism sectors over three survey periods (2022, 2024, and 2025), highlighting shifts in representation among restaurants, accommodation, tourism, and fast-food businesses.

TABLE 01

Sector	2025	2024	2022
Restaurants and Cafes	27%	21%	17%
Accommodation	23%	28%	28%
Tourism/Travel/Transport	19%	20%	25%
Fast food/Other Hospitality	31%	28%	15%

GENDER

The gender distribution in 2025 is broadly consistent with that of earlier years, with women comprising approximately 60.8%, men 38.9%, and only a very small proportion identifying as another gender (0.3%).

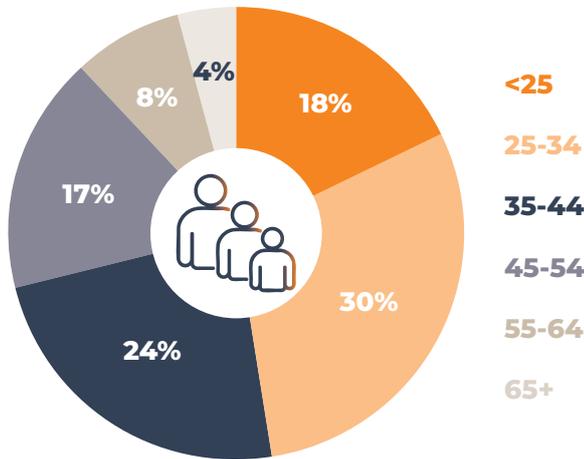


TABLE 02

Characteristic	Percentage of responses
Gender	
Female	23%
Male	19%
Another gender	31%
Age	
15–19	5%
20–24	12%
25–29	16%
30–34	15%
35–39	13%
40–44	11%
45–49	10%
50–54	7%
55–59	5%
60–64	3%
65+	4%
Ethnicity	
New Zealand	60%
Māori	13%
Other Asian	8%
Indian	5%
Pacific Peoples	4%
Chinese	4%
Filipino	3%
Middle East	2%
Other	1%

Age

FIGURE 01: AGE GROUPED



This study shows a slightly older age profile than in 2024, with 33% of respondents under 30 (down from 38%) and a smaller proportion aged 15–19 (5% compared with 8%). The largest age group was 25–34 years (30%), confirming the continued dominance of mid-career respondents. The share aged over 50 was broadly unchanged from 2024.

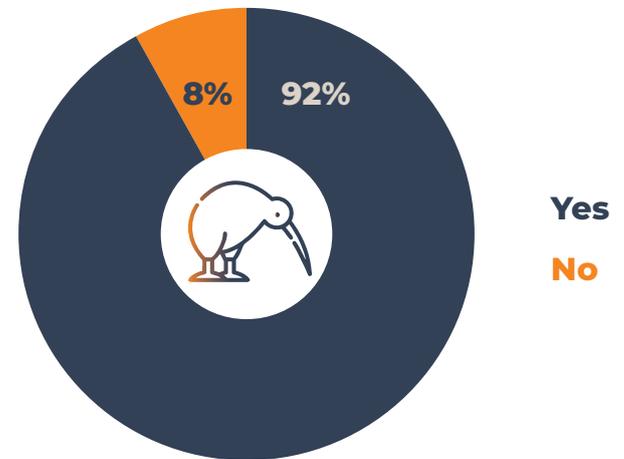
Ethnicity

TABLE 03: 2022 , 2024, 2025 COMPARISON: ETHNICITY

Ethnicity	2025	2024	2022
New Zealand European	60%	57%	62%
Māori	13%	9%	7%
Pacific Peoples	4%	5%	6%
Asian	17%	18%	13%
Other	6%	11%	12%

Citizenship Status in the Workforce

FIGURE 02: ARE YOU A NZ CITIZEN?

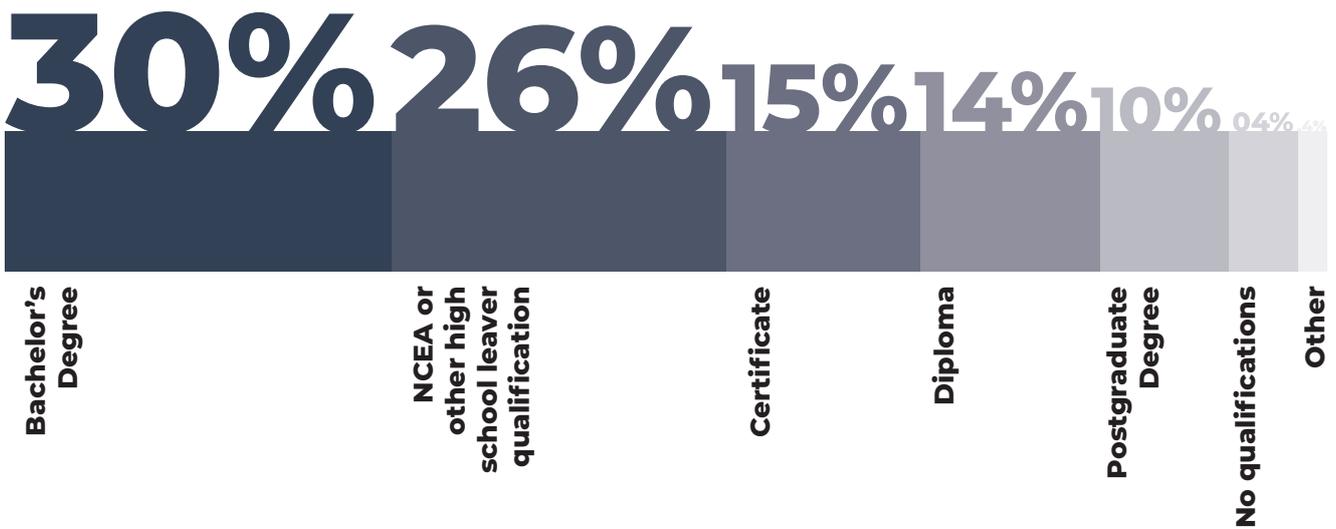


The clear majority (92%) of respondents are New Zealand citizens or permanent residents. The other 8% of respondents are mainly in the three categories of 'student visa' (31%), 'working holiday visa' (21%), and then 'other work visa' (19%). This pattern has remained stable across all three surveys, with citizens comprising 93% of respondents in 2022 and 2024.

Education

Overall, respondents' educational attainment is increasing, with a clear shift toward degree-level qualifications.

FIGURE 03: EDUCATION



2022, 2024, 2025 COMPARISON: EDUCATION

Education levels among respondents have remained relatively stable, with most holding secondary or tertiary qualifications. Bachelor's degrees are the most common (30%), while postgraduate qualifications account for 10%, and only a small proportion (4%) report having no formal qualifications.

TABLE 04

Education	2025	2024	2022
No qualifications	4%	5%	x
NCEA	26%	27%	19%
Certificate	15%	13%	15%
Diploma	14%	15%	22%
Bachelor's Degree	30%	28%	25%
Postgraduate Degree	10%	10%	12%

40%

hold a bachelor's or postgraduate qualification

Reflecting a steady rise in sector education levels



Neurodiversity

The 2025 data show that **24%** of respondents identify as neurodivergent, with a further 13% reporting uncertainty. This represents a marked increase from 2024, when 15% identified as neurodivergent and 10% were unsure.

NEURODIVERGENT SELF-IDENTIFICATION AND SENSE OF CONNECTION

This table presents responses from all survey participants (N = 899) to two questions on neurodivergent self-identification and sense of connection. The results reflect the full sample and are not limited to respondents who identify as neurodivergent.

TABLE 05

Question	Agree	Disagree	Neutral
I see myself as neurodivergent	24%	63%	13%
I feel strong ties with neurodivergent people	26%	44%	30%

ORGANISATIONAL NEURODIVERSITY AWARENESS AND EMPLOYMENT PRACTICES

Fewer than one-third of respondents report that their organisation actively raises awareness of neurodiversity or takes steps to improve employment practices for people with neurological conditions.

TABLE 06

Question	Agree	Disagree	Neutral
My organisation takes action to raise awareness of neurodiversity	24%	63%	13%
My organisation talks to all workers to improve the employment of people with neurological conditions	26%	44%	30%

Management Responsibilities

The surveys continue to attract a substantial proportion of manager respondents (45%), with more than half (over 55%) holding relatively junior leadership roles such as supervisor, duty manager, or team leader. This represents an increase over time: managers comprised 36% of respondents in 2022 and 49% in 2024.

FIGURE 04: DO YOU MANAGE STAFF?

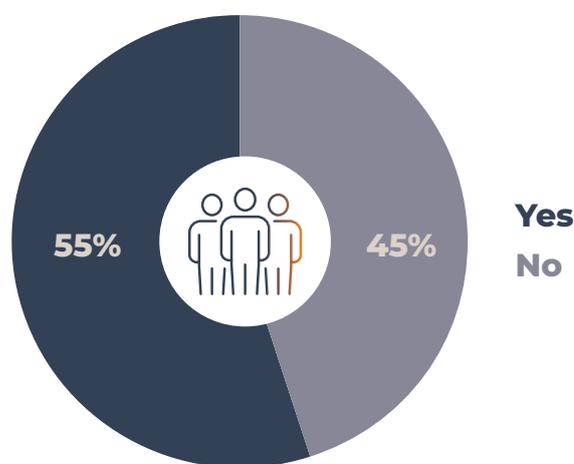
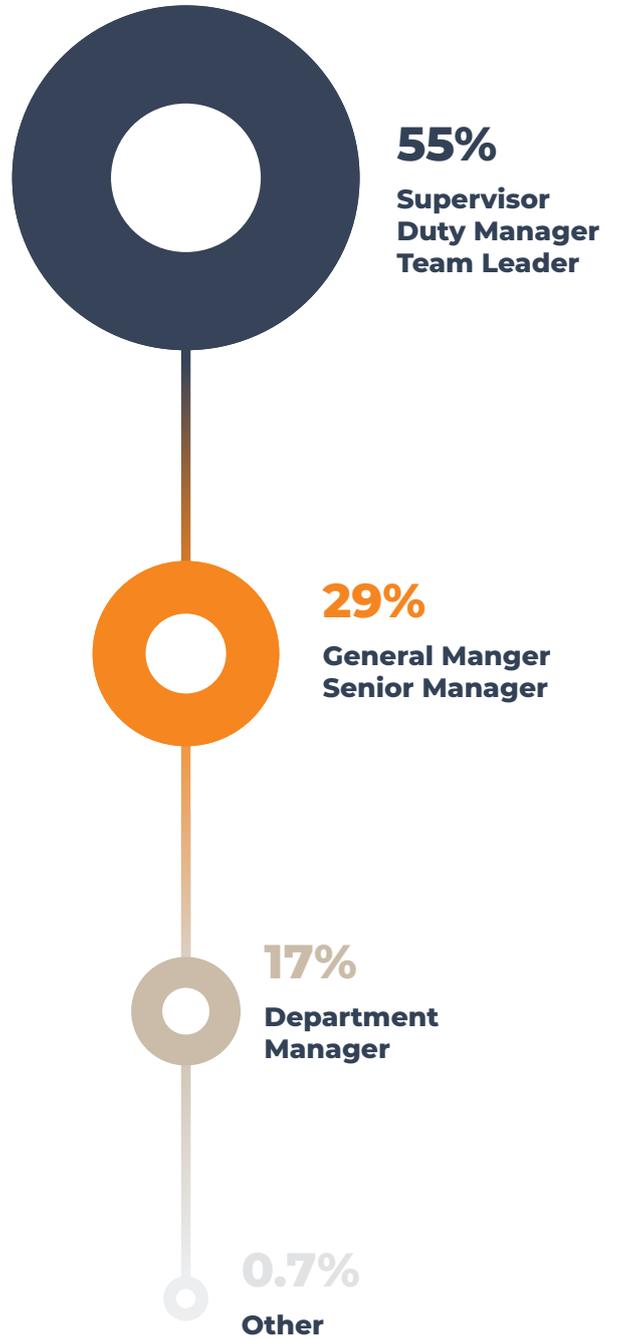




FIGURE 05: MANAGEMENT LEVEL



Job Distribution for Non-Management Positions

Hospitality roles dominate the jobs data, with front-line hospitality service roles accounting for 39% of respondents.

FIGURE 06: UNION MEMBERSHIP

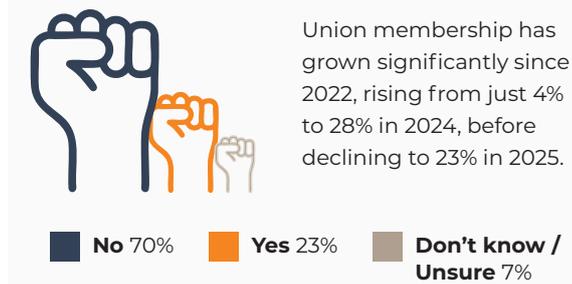
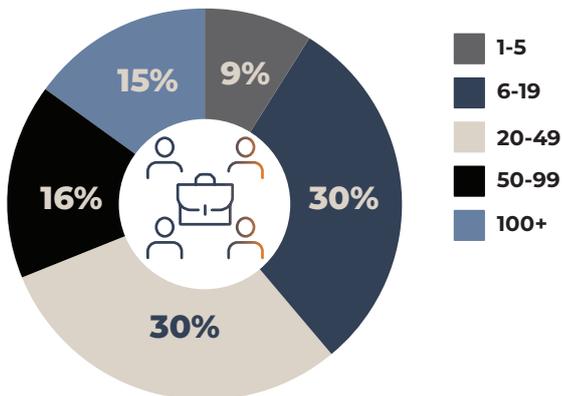


FIGURE 07: APPROXIMATELY HOW MANY PEOPLE ARE EMPLOYED IN YOUR PLACE OF WORK?



Organisation Size

The distribution of respondents by organisation size is broadly consistent with the 2024 and 2022 surveys. The key difference is a decline in very small organisations (1-5 employees), which accounted for 9% of respondents in 2025 compared with 14% in 2022 and 13% in 2024.

Location

FIGURE 08: LOCATION OF WORK GROUPED

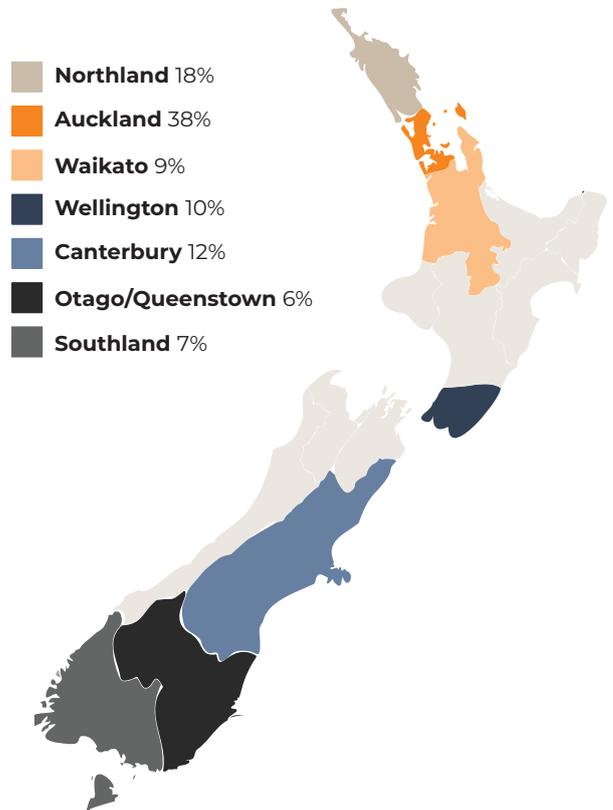
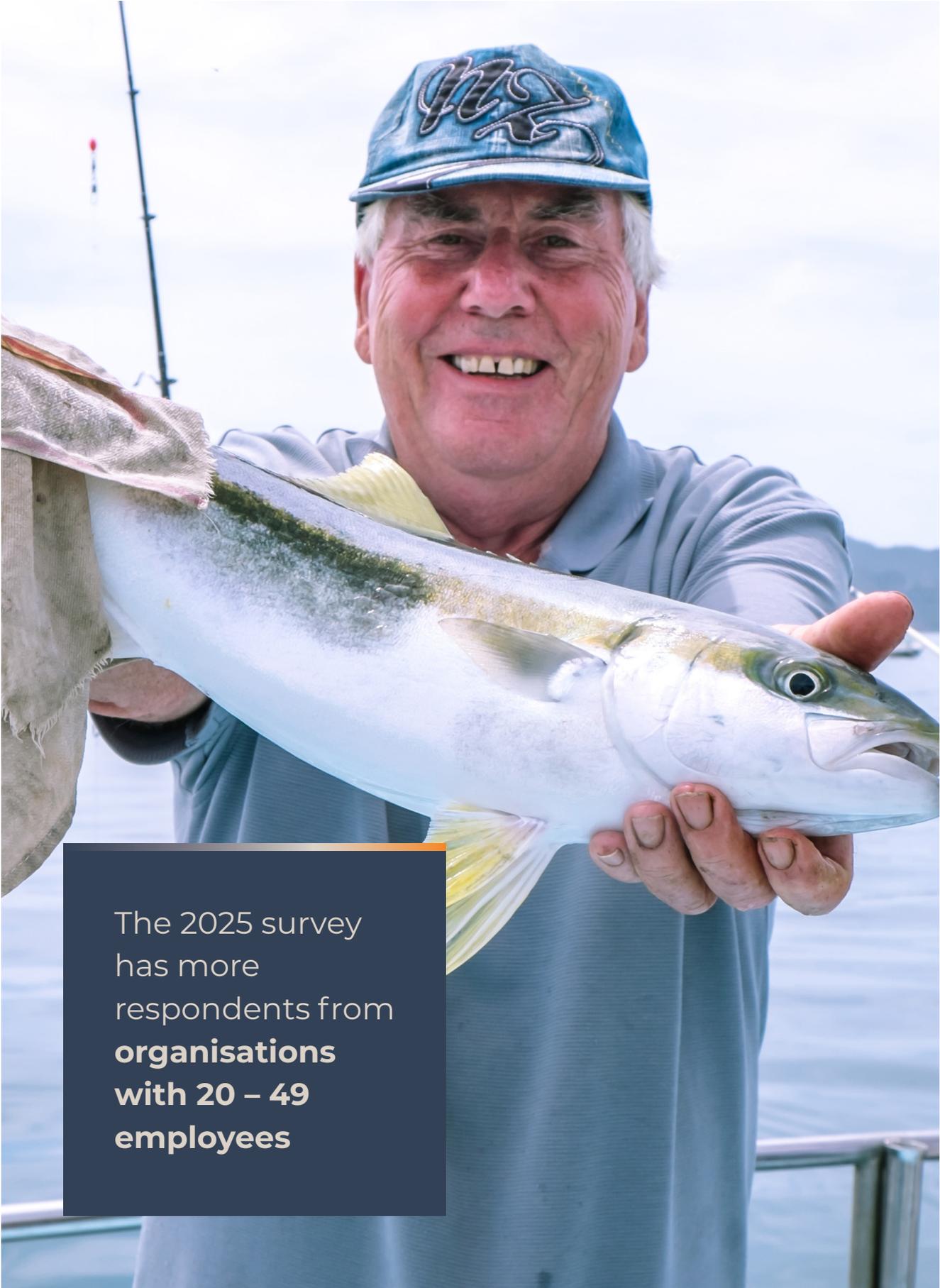


TABLE 07: NON MANAGEMENT JOBS GROUPED

NON-MANAGEMENT JOBS GROUPED	PERCENTAGE OF RESPONSES
Waiter / Food and Beverage Attendant / Bar Staff; Fast food; Barista	39%
Front Office / Housekeeping, Cleaner	19%
Kitchen Hand / Chef	14%
Tourism Business Operator, Tourism sales service, Spa	10%
Regional Tourism organisation employees; Admin	7%
Air Cabin crew; Transport	5%
Tour Guide	3%
Other	2%
Gaming Operator / Security / Door Staff	2%
IT / Finance and Marketing	1%



The 2025 survey has more respondents from **organisations with 20 – 49 employees**

Sector Tenure

Sector-tenure patterns indicate a decline in short-term employment, with fewer respondents reporting less than one year in the industry compared with previous years. Longer tenure is becoming increasingly common: 25% have worked in the sector for 5–10 years, and over half now report careers of five years or more.

FIGURE 09: YEARS OF EMPLOYMENT IN THE HOSPITALITY AND TOURISM SECTOR

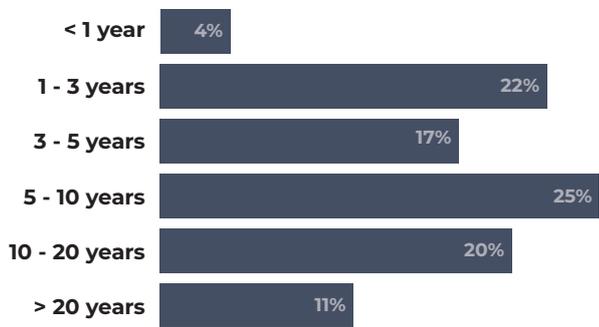


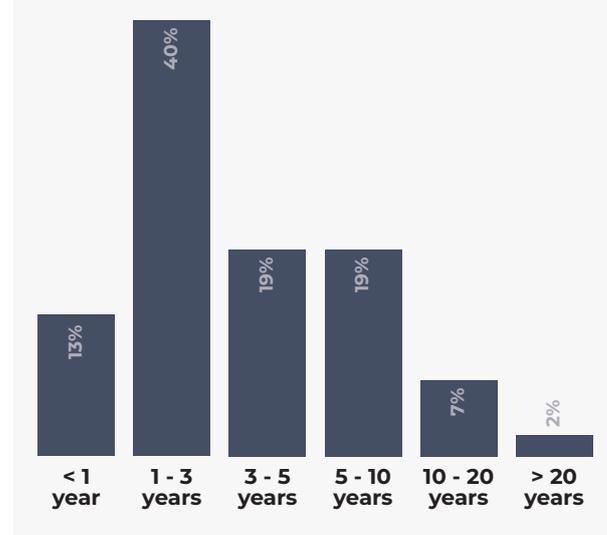
FIGURE 10: 2022, 2024, 2025 COMPARISON: SECTOR TENURE

Tenure	2025	2024	2022
Less than 1 year	4%	10%	12%
1 - 3 years	22%	26%	16%
3 - 5 years	17%	19%	14%
5 - 10 years	25%	21%	x
10 - 20 years	20%	14%	x
More than 20 years	11%	10%	x

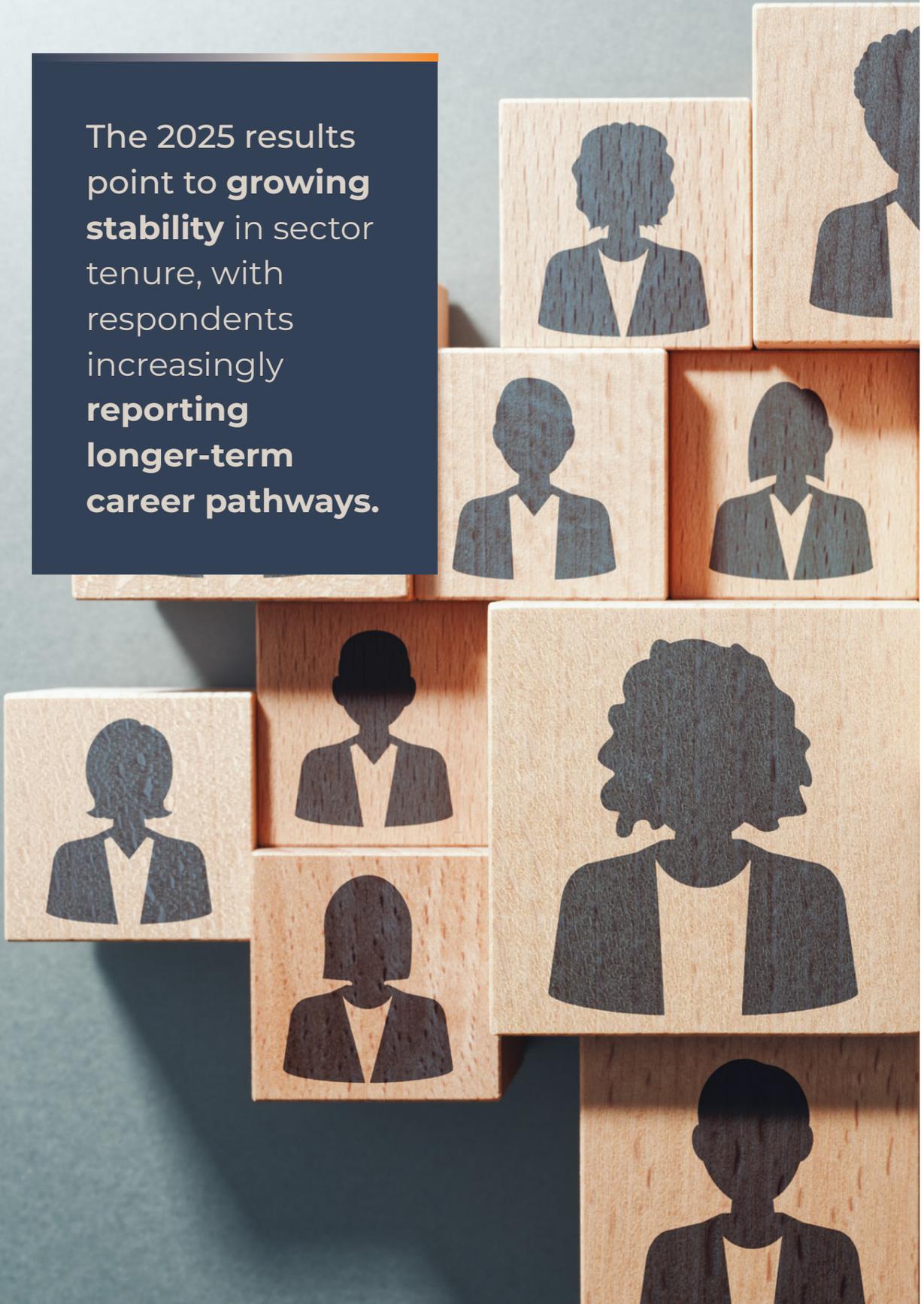
Organisational Tenure

Organisation tenure data shows the time respondents have spent working in a particular organisation, as opposed to their tenure in the sector as whole.

FIGURE 11: ORGANISATIONAL TENURE



The 2025 results point to **growing stability** in sector tenure, with respondents increasingly reporting **longer-term career pathways.**



Employment Conditions

Employment agreements, pay structures, and working conditions remain central to workforce stability in hospitality and tourism. While most respondents report having signed a written agreement, variations in employment status and perceptions of pay adequacy point to persistent challenges. These findings reinforce the need for continued attention to fair compensation, secure employment, and transparent rostering to support a more resilient and sustainable sector.

Employment Agreements and Status

Sector-tenure patterns indicate a decline in short-term employment, with fewer respondents reporting less than one year in the industry compared with previous years. Longer tenure is becoming increasingly common: 25% have worked in the sector for 5–10 years, and over half now report careers of five years or more.

FIGURE 12: WRITTEN EMPLOYMENT AGREEMENT WITH CURRENT EMPLOYER

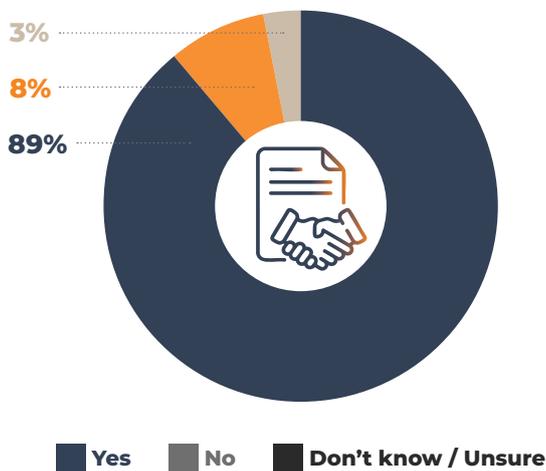


FIGURE 13: 2022, 2024, 2025 COMPARISON: WRITTEN EMPLOYMENT AGREEMENT

Signed Employee Agreement	2025	2024	2022
Yes	89%	89.7%	87.9%

Most respondents (59%) were in permanent full-time employment (Table/Figure X), while 26% were in permanent part time employment and only 10% were casual or on-call.

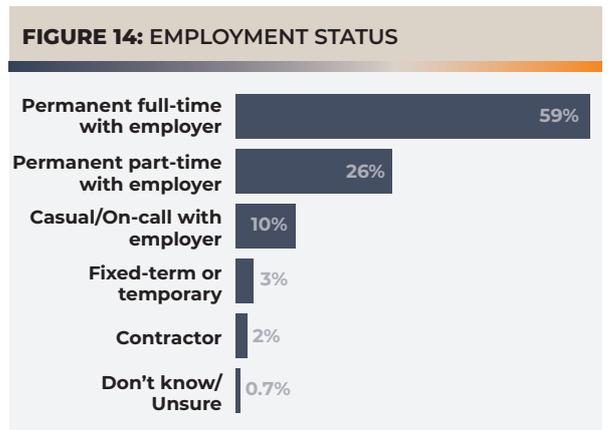


TABLE 08: 2022, 2024, 2025 COMPARISON: EMPLOYMENT STATUS

Employment status has remained largely stable over time, with permanent full-time roles easing slightly since 2022, permanent part-time roles rising, and casual work continuing its steady upward drift. Fixed-term and contractor roles remain a small minority.

Employee Status	2025	2024	2022
Permanent FT	59%	61%	62%
Permanent PT	26%	26%	18%
Casual on-call	10%	8%	6%
Fixed term/temp	3%	2%	7%
Contractor	2%	2%	3%

2025 PAY DATA

In 2025, 37% of respondents are paid a salary, 63% are paid an hourly wage. Mean actual hours worked = 33.33 per week. In 2024 this was 32.1% paid salary and 67.9% paid hourly.



The mean salary rate is
\$80,101

Mean hourly rate for		
SALARY WORKERS	HOURLY WORKERS	ALL WORKERS
\$42.78	\$27.72	\$32.73

HOURLY PAY RATES

The New Zealand 2025 Minimum Wage is \$23.50 per hour and the 2025/26 Living Wage is \$28.95. By comparison, in 2024 the Minimum Wage was \$23.15 per hour, and the Living Wage (2024/25) was \$27.80.

Hourly earnings cluster tightly within the mid-range, with the \$25–\$29.99 band representing the largest proportion of workers (37%), and relatively few employees earning at either the lowest or highest ends of the pay scale

FIGURE 15: HOURLY RATES FOR ALL WORKERS

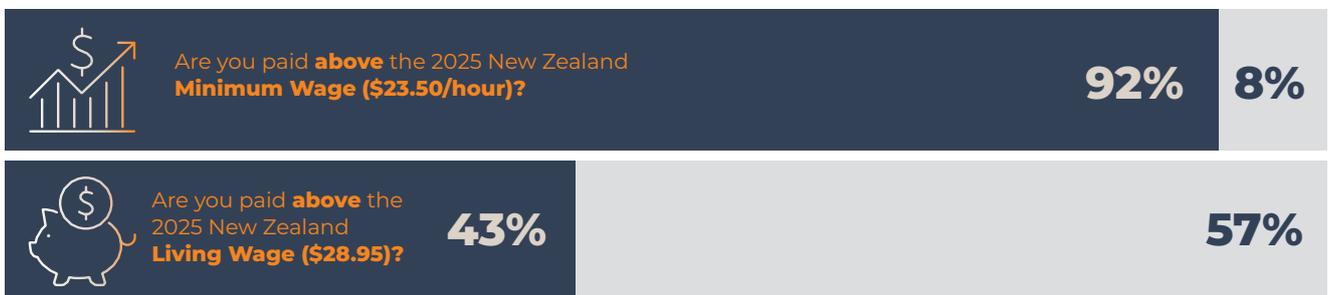


MINIMUM WAGE

Figure 16 shows that 8% report being paid less than the Minimum Wage.

■ Yes ■ No

FIGURE 16: ARE YOU PAID ABOVE MINIMUM WAGE?



There is a strong statistical relationship between respondents' location, and their being paid the Living Wage. Almost half (47%) of employees working in the main centres reported earning more than the Living Wage, while only 38% of those living in the regions do so.

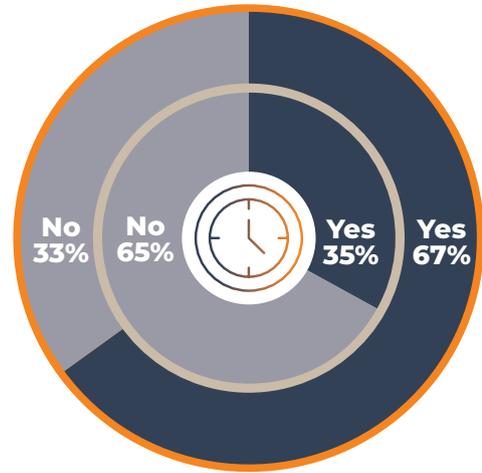
TABLE 09: MINIMUM AND LIVING WAGE COMPARISON, 2022–2025

Paid Living Wage, Minimum Wage	2025	2024	2022
Paid Min Wage: Yes	92%	99.1%	90%
Paid Min Wage: No	8%	0.9%	8%
Paid Living Wage: Yes	43%	49%	x
Paid Living Wage: No	57%	51%	x

Living Wage coverage has slipped since 2024, dropping from 49% to 43% in 2025. As a result, more than half of respondents continue to earn below the Living Wage, underscoring the sector’s ongoing difficulty in providing financially sustainable employment. Overall, the pattern is one of retreat rather than progress.

At the same time, Minimum Wage compliance remains extremely high: 92% of workers in 2025 report being paid at least the Minimum Wage, similar to 2022 but slightly below the near-universal rate seen in 2024. The overall pattern suggests a sector that meets statutory requirements but continues to lean heavily on lower pay

FIGURE 17: ROSTERS AND SHIFTS



OUTER RING
Does your weekly roster include **specific finish times** for each shift?

INNER RING
Are you ever rostered for **split shifts** (two work periods in one day separated by a long unpaid break)?

92%

RESPONDENTS
Paid at least the Minimum Wage

43%

RESPONDENTS
Paid at least the Living Wage



FAIR PAY

Respondents who indicated they were being paid fairly in 2025 were **48%**, compared with 57% in 2024 and 48% in 2022.

TABLE 10: FAIR PAY COMPARISON, 2022-2025

Fair Pay	2025	2024	2022
I feel I am being paid fairly	48%	57%	48%

Career Calling, Industry Attraction and Turnover Intention

Employment agreements, pay structures, and working conditions remain central to workforce stability in hospitality and tourism. While most respondents report having signed a written agreement, variations in employment status and perceptions of pay adequacy point to persistent challenges. These findings reinforce the need for continued attention to fair compensation, secure employment, and transparent rostering to support a more resilient and sustainable sector.

CAREER CALLING AND INDUSTRY ATTRACTION

Career calling describes a way of experiencing work as deeply meaningful and personally fulfilling, grounded in a sense of purpose and contribution that extends beyond the self. The average agreement rate across five career calling items was 72% among hospitality and tourism respondents.



63%

“ If I could do it all over again, I would still choose to work in the **hospitality/ tourism industry** ”



The 2025 qualitative findings reinforce long-standing themes in why people are drawn to hospitality and tourism. Respondents value the industry’s social, fast-paced, and varied nature, the chance to work with diverse groups, and the satisfaction of creating positive experiences. Flexibility for balancing study or other commitments remains important, alongside pragmatic drivers such as low entry barriers, quick progression, and the influence of fun, travel, passion, and family connections.

TABLE 11: QUALITATIVE INSIGHTS ON INDUSTRY ATTRACTION

Theme	Number of responses
People interaction and social connection	520
Ease of entry / job availability	420
Travel and cultural exposure	330
Passion for food, service, and hospitality	300
Flexibility and fit with study/lifestyle	260
Enjoyment of work environment (fun, fast-paced, variety)	240
Career opportunity and skill development	190
Financial motivation	170
“Fell into it” / accidental entry	150
Personal fit and identity	140

(Note: Multiple responses per respondent were permitted. Numbers indicate theme frequency).

ATTRACTION TO THE SECTOR

The dynamic nature, global reach, and the opportunity to **create meaningful experiences for people worldwide.**

“ I enjoy working with people, creating positive experiences, and being part of **an industry that's vibrant and always changing** ”

“ My parents have owned hospitality businesses since before I was born. Naturally I got into it, but when I discovered from an early age that **I had the charisma, passion for people, and skills to do this work well** - I didn't leave. ”

“ The variation in hours and the amount of hours that could be worked. Also, I enjoy the preparation and serving of food to people. I was attracted as jobs need to be started right away which meant **a stable income fast.** ”

“ I was **attracted to the dynamic, fast-paced nature of the industry.** I thrive in environments that require quick thinking, adaptability, and teamwork to achieve a common goal under pressure. ”

“ I loved **watching my aunts at the marae run the kitchen** and I wanted to do that same. ”

Career commitment

Career commitment reflects how strongly workers feel attached to hospitality and tourism, shown by their intention to stay in the industry and see it as a long-term career. The average agreement rate across seven career commitment items was 57% among hospitality and tourism respondents.

TABLE 12: CAREER COMMITMENT

Question	Agree	Disagree	Neutral
If I could go to a different job in an industry other than hospitality/tourism which paid the same, I would not do so	52%	26%	22%
I definitely want a career for myself in the hospitality/tourism industry	62%	20%	18%
If I could do it all over again, I would still choose to work in the hospitality/tourism industry	63%	19%	18%
If I had all the money, I needed without working, I would probably still continue to work in the hospitality/tourism industry	58%	29%	13%
I like this vocation too much to give it up	53%	26%	21%
This is the ideal profession for my lifelong work	50%	33%	16%
I never feel disappointed that I ever entered the hospitality/tourism industry	62%	21%	17%



SPOTLIGHT:

Neurodivergent Workers

Neurodivergent (ND) employees are evenly represented across management and front-line roles, but as a group they report limited access to training, promotion opportunities, and fair pay, alongside higher rates of bullying and harassment.

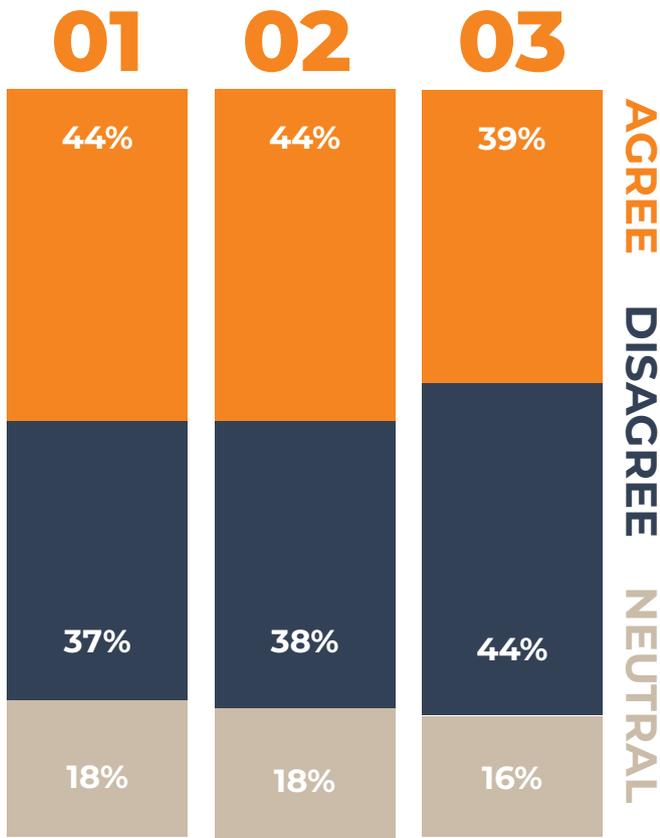
Overall, ND workers show greater exposure to workplace mistreatment

and higher intentions to leave. Organisational support for ND workers strongly enhances career commitment and satisfaction while reducing turnover intentions.

Career withdrawal intentions

Individual survey items show 39–44% agreement with statements about leaving the sector. When combined into a yes-no measure, **42%** of respondents intend to leave hospitality and tourism altogether.

TABLE 13: CAREER WITHDRAWAL INTENTIONS



Figures do not add up to 100% because of rounding.

- 01.** I am thinking about leaving hospitality/tourism for an occupation in a different industry.
- 02.** I intend to look for a new occupation in a different industry
- 03.** I am actively searching for an alternative to my occupation

The 2025 qualitative findings on turnover intention show patterns consistent with 2024, with dissatisfaction driven by low pay, unsociable hours, poor work-life balance, and cumulative stress. A strong push-pull dynamic persists: limited career progression within hospitality and tourism contrasts with perceived opportunities elsewhere.

TABLE 14: QUALITATIVE INSIGHTS ON REASONS FOR LEAVING THE HOSPITALITY AND TOURISM SECTOR

Theme	Number of responses
Low pay / financial insecurity	360
Poor work-life balance and unsociable hours	300
Lack of career progression	240
Studying / moving into another career	220
Stress, burnout, and mental health	210
Poor treatment from customers	190
Poor management / toxic environment	170
Physical demands, injury, and health	140
Desire for change / new challenges	130
Industry instability / job insecurity	95

(Note: Multiple responses per respondent were permitted. Numbers indicate theme frequency.)

Overall, **pay, hours, and career stagnation** form the core drivers for leaving or considering leaving the hospitality and tourism sector. Many respondents do not dislike the work itself, but feel it is unsustainable long-term, especially when balancing health, family, financial security, and personal aspirations.



REASONS FOR LEAVING THE HOSPITALITY AND TOURISM SECTOR

“ I’m now looking to move into a role that **offers greater stability, regular hours, and long-term career growth.** ”

“ Dealing with nasty people has **taken its toll on the body and soul.** ”

“ After working forty hours a week and paying tax and union fees, I receive \$783.75. **I am responsible for myself and my partner financially** and not including medical and groceries, our expenses total \$720.92 a week. ”

“ I am ready to look for something that is more for me and offers more money. I am currently not in a position to continue in the hospitality sector on my wages and **am looking for something that is going to further my career.** ”

“ It is mainly **because of the slogan “the customer is always right”.** This statement creates a sense of entitlement to the customers, regarding hospitality workers as less than and can be treated however they see fit. ”

“ Working in hospitality is a good job for me as I am young, studying and need to earn money. **But eventually I want to have a bigger career more fitted to my interests.** ”

Organisational Turnover Intention

Employee retention at the organisational level is a pressing concern. Between 41% and 45% of employees agree with statements suggesting they intend to leave their organisation. When responses are combined into a simple yes-no measure, **43%** show turnover intention. This trend is consistent across managers and non-managers, indicating the issue spans all levels of the organisation.

TABLE 15: ORGANISATIONAL TURNOVER INTENTION

Question	Agree	Disagree	Neutral
I am currently looking for another organisation to work for	41%	41%	19%
I often think of leaving this organisation	45%	38%	17%
I will probably leave this organisation in the next 12 months	43%	37%	20%

FIGURE 18: TURNOVER INTENTION



Organisational turnover intention is significantly higher in hospitality (40%) than tourism (31%). It is lowest in very small workplaces with 5 or less staff (20%) but peaks in mid-sized establishments with 20–49 employees (46%).

Tenure is strongly related to stability. Almost half of those with under three years' service intend to leave (47–49%), compared with about one in five among those with 3–10 years' tenure and just 14% among those with over 20 years.

Age shows a clear gradient with more than half of workers under 25 planning to leave (54%), declining steadily to only 11% among those aged 65 and over.

There are no statistically significant differences in turnover intention by gender, ethnicity, or location, although workers with a bachelor's degree are more likely to be intending to move compared with those with lower or higher qualifications.



KEY INSIGHTS

Overall, younger, short-tenure employees, particularly in hospitality and mid-sized workplaces, show the highest rates of career turnover intention. More experienced and older workers are markedly more likely to remain.

As pay increases, career commitment rises sharply, indicating a strong positive relationship between earnings and employees' willingness to invest in a hospitality or tourism career. However, higher pay alone does not substantially reduce job or career turnover intentions, suggesting that retention hinges on more than wages.



Quiet Quitting

Quiet quitting behaviours are evident among a notable minority of employees, with around **one-third avoiding** extra hours and non-mandatory meetings, and just over half limiting work strictly to official hours. These patterns point to boundary-setting rather than widespread disengagement, possibly linked to burnout and work-life balance concerns.

TABLE 16: QUIET QUITTING

Question	Agree	Disagree	Neutral
At work, I consciously choose not to work beyond the minimum expected of me	36%	46%	18%
No matter how urgent a task is, it's only right for me to work on it during official work hours	52%	29%	19%
At work, I choose not to work extra hours to enhance the quality of my work beyond the minimum expected of me	37%	45%	18%
I choose not to check work-related emails/messages after work hours if I am not required to do so	44%	40%	16%
At work, I choose not to attend non-mandatory meetings	36%	42%	22%
MY EMPLOYER does not expect me to work extra hours, or check work related emails after hours	46%	32%	22%

The top drivers of Career Commitment are also the top inhibitors of Turnover Intention:



Access to, and satisfaction with, training



Opportunities for promotion



Perception of fair pay



Perceived dignity in the workplace

TABLE 17: QUALITATIVE INSIGHTS INTO ENTRY AND EXIT DYNAMICS IN TOURISM AND HOSPITALITY EMPLOYMENT

WHY PEOPLE ENTER	WHY PEOPLE LEAVE
Enjoy working with people, social interaction, meeting new people	Emotional exhaustion from customers, abuse and/or constant emotional labour
Easy to get a job, low barriers to entry	Pay too low to survive long-term, especially as responsibilities grow
Flexible hours that fit study or lifestyle	Unsociable hours, weekends, nights and/or poor work-life balance
Fun, fast-paced and energetic environment	Stress, burnout, understaffing and/or high pressure
Passion for food, service, hospitality	Passion eroded by poor management and lack of support
Travel opportunities, cultural exposure	Industry instability, seasonal work and/or lack of security
Opportunity to gain skills and progress	Little real career progression or wage growth
Short-term income while studying	Becomes unsustainable after study ends
“Fell into it” or convenient option	Desire for a “real”, stable, respected career





Decent Work and Engagement

Workplace dignity, job satisfaction, and engagement have strengthened across the sector, supported by higher scores among older, longer-tenured, and better-paid employees. At the same time, Decent Work outcomes are mixed, with only moderate levels of satisfaction regarding pay, rest, and value alignment.

TABLE 18: DECENT WORK

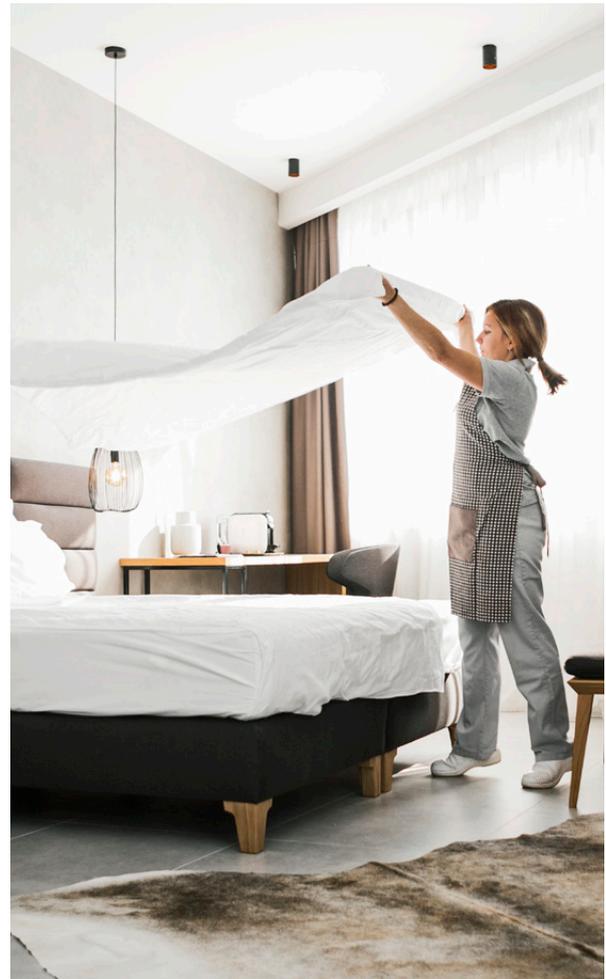
Question	Agree	Disagree	Neutral
I am properly paid for my work	52%	34%	14%
I feel I am paid enough based on my qualifications and experience	48%	38%	14%
I am rewarded adequately for my work	46%	37%	17%
I have time to rest during the work week	60%	25%	15%
I have enough time for non-work activities	56%	30%	14%
I have free time during the work week	59%	26%	15%
My organisation's values, particularly its commitment to environmental sustainability, are consistent with my personal values	51%	22%	27%
My organisation demonstrates values that align with my own, especially in relation to environmental sustainability	54%	21%	25%

Agreement with items concerning free time and rest (3 items) averaged 59%, reflecting moderate perceptions of work–life balance. In contrast, value alignment with employers was lower, with an average agreement rate of **53%** (2 items).

Average agreement across five workplace dignity and job-satisfaction measures reached **68%**, marking a continued improvement since 2022 (62%) and consolidating gains made in 2024 (67.5%).

TABLE 19: WORKPLACE DIGNITY/SATISFACTION

Question	Agree	Disagree	Neutral
I feel like a human being at work	70%	18%	12%
I often feel like I am fully alive	62%	22%	16%
In my workplace I am treated as a person not just a human resource	67%	20%	13%
I feel respected at work	68%	17%	15%
I enjoy my working environment	72%	15%	13%



67%

“ In my workplace I am treated as a person not just a human resource ”

The average agreement rate across nine workplace engagement items was **64%** among hospitality and tourism respondents.

TABLE 20: WORKPLACE ENGAGEMENT

Question	Agree	Disagree	Neutral
At my work, I feel bursting with energy	56%	26%	18%
At my job, I feel strong and vigorous	60%	22%	18%
When I get up in the morning, I feel like going to work	53%	30%	17%
I am enthusiastic about my job	68%	16%	16%
My job inspires me	59%	23%	18%
I am proud of the work that I do	75%	13%	12%
I feel happy when I am working intensely	69%	16%	15%
I am immersed in my work	71%	13%	16%
I get carried away when I am working	64%	15%	21%

Work engagement is **notably higher** among employees with people-management responsibilities (62% compared with 46% for non-managers) and is also higher in tourism businesses (60%) than in hospitality (47%).

Engagement also varies by **workplace size**, peaking in very small organisations (67%), while larger workplaces (100+) show markedly lower levels (54%), suggesting structure and scale play a meaningful role in shaping how connected employees feel to their work.

Work engagement **rises sharply** with both tenure and age, climbing from low levels among newer and younger workers (38%) to very high engagement among long-serving and older employees (89%).

Work engagement **increases with both education and pay**, rising steadily from lower-qualified and lower-paid workers to peak levels among degree holders and those earning \$30 or more per hour.



KEY INSIGHTS

Work engagement is impacted by structural and organisational factors - such as sector, managerial responsibility, workplace size, tenure, and remuneration - rather than by individual characteristics alone.

While engagement softens slightly at the very highest pay bands, the overall pattern is clear: investment in skills and fair remuneration is strongly associated with a more engaged workforce.



Training, Development and Advancement

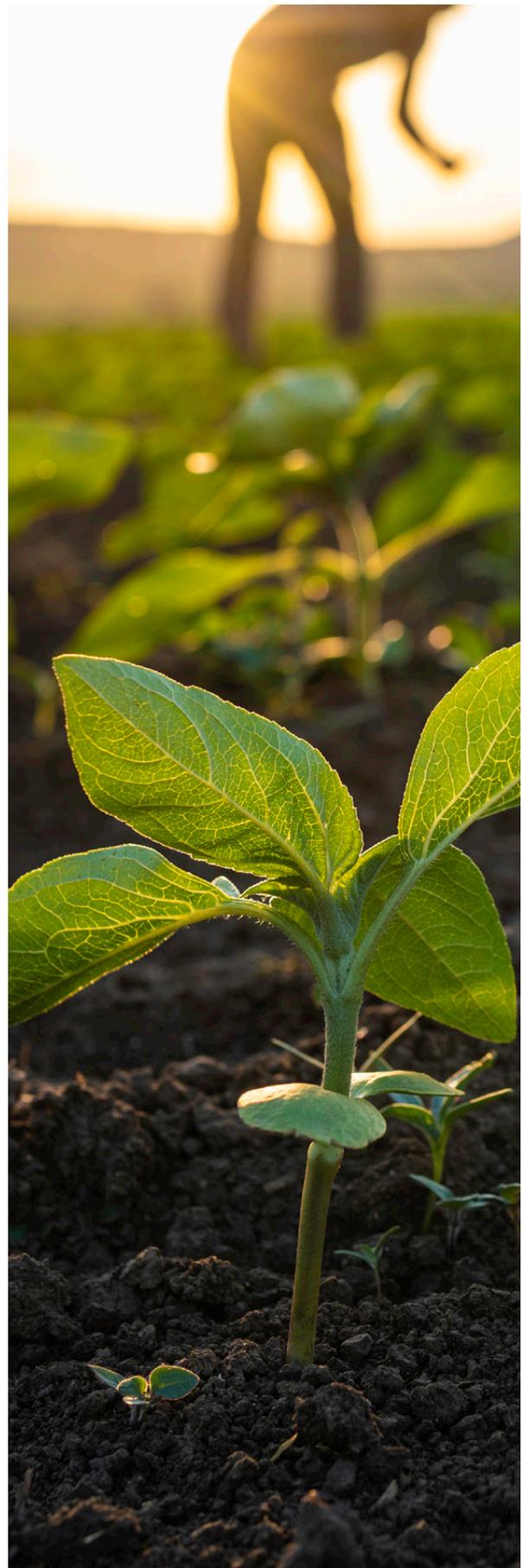
Workplace dignity, job satisfaction, and engagement have strengthened across the sector, supported by higher scores among older, longer-tenured, and better-paid employees. At the same time, Decent Work outcomes are mixed, with only moderate levels of satisfaction regarding pay, rest, and value alignment.

TABLE 21: 2022, 2024, 2025 COMPARISON: TRAINING

Training	2025	2024	2022
Have had formal training	64%	53%	16%
Have had informal training	76%	76%	38%
Training opportunities good	62%	57%	41%
I have the skills to do my job with confidence	87%	90%	x
Would like more training	70%	60%	51%

TABLE 22: TRAINING 2025

Question	Agree	Disagree	Neutral
I have had formal training by my employer for skills or qualifications as part of my job	64%	24%	12%
I have had informal, 'on-the-job' training as part of my job	76%	12%	12%
I receive supportive feedback from managers/owners	67%	18%	15%
I feel the training and development opportunities I have been offered are good	62%	21%	17%
I have the skills to do my job with confidence	87%	6%	7%
I would like more training and development	70%	11%	19%



Patterns of Training Participation and Promotion Opportunities Across the Workforce



Tenure effect

Longer tenure boosts training participation (52% less than 1 year to 74% at 5-10 years) and promotion opportunities (37% less than 1 year to 59% at 5-10 years).



Age patterns

Training increases with age (56% under-25s to 69% at 65+), and promotion opportunities peak among 45-54-year-olds (57%), lowest for under-25s (41%).



Pay is critical

Training participation jumps from 41% (paid less than \$21.50 an hour) to 75-80% (\$30+), and promotion opportunities follow a similar trend, reaching 70% for those earning over \$50 an hour.



Workplace type and size matter

Training participation is higher in tourism (69%) compared to hospitality (58%). Training peaks in medium-sized workplaces (50-99 employees) at 72%, while promotion opportunities rise with size from 35% (1-5 staff) to 61% (50-99 staff).



Education matters

Highest training rates among those with a bachelor's degree (66%) and postgraduate degree (63%), compared to 58-62% for diploma or school-level qualifications. Promotion opportunities show no significant difference by qualification.



Managers and sector differences

Employees who manage staff have higher training participation (69% vs 58%) and more promotion opportunities (57% vs 40%). Tourism businesses outperform hospitality for both training (69% vs 58%) and promotion opportunities (55% vs 42%).



Ethnicity differences

New Zealand European and Māori employees have similar training participation (63% each), Pacific Peoples slightly lower (55%), while Filipino and Other Asian groups report the highest rates (74% and 72%).

AI Adoption

AI adoption remains modest and uneven across the sector, with only around one-third of workers using AI and a majority reporting limited managerial support.

TABLE 23: AI USAGE

Question	Agree	Disagree	Neutral
I use artificial intelligence to support my job functions	33%	53%	14%
I spend some of my time working with artificial intelligence	32%	55%	13%
I work with artificial intelligence when making certain work decisions	29%	59%	12%
I believe that by using AI for my tasks, I can perform better	35%	49%	16%
Our managers support us by providing staff resources, funding, and operational materials for AI initiatives	29%	51%	20%

AI uptake is higher in larger, city-based workplaces and concentrated among managers and tourism businesses. It is strongly linked to education and pay, reaching 44% among those with postgraduate qualifications. Equity gaps persist, with Māori and Pacific Peoples reporting lower adoption than New Zealand Europeans, while Other Asian groups show the highest use. Gender differences are minimal, and neurodivergence appears to have no significant effect.

33%

“ I use artificial intelligence to support my job functions ”



35%

“ I believe that by using AI for my tasks, I can perform better ”

Across the workforce, feeling **productive** was remarkably consistent, with only small differences by demographics or workplace characteristics; the one clear exception was that tourism workers were slightly more likely than hospitality workers to report being productive.

Caring about organisational **profitability** showed sharper divides: managers, tourism workers, older staff, higher-paid staff, and those with longer tenure or higher qualifications were all more likely to prioritise their organisation's financial performance, signalling that financial awareness grows with experience, earnings, and the commercial context people work in.

While most respondents care deeply about being productive and supporting profitability, perceptions of promotion opportunities and career progression remain moderate.

TABLE 24: GROWTH WITH THE COMPANY

Question	Agree	Disagree	Neutral
I have opportunities for promotion in my workplace	53%	30%	17%
As I become more skilled at my job, I am likely to get promoted or get more pay	53%	30%	17%
I care about being useful/productive in my job	83%	8%	9%
I care about my organisation being profitable	75%	11%	14%

TABLE 25: GROWTH COMPARISON 2022-2025

Growth	2025	2024	2022
I have opportunities for promotion in my workplace	53%	48%	42%
As I become more skilled at my job, I am likely to get promoted or get more pay	53%	49%	39%
I care about being useful/productive in my job	83%	91%	x
I care about my organisation being profitable	75%	76%	x

Wellbeing at Work

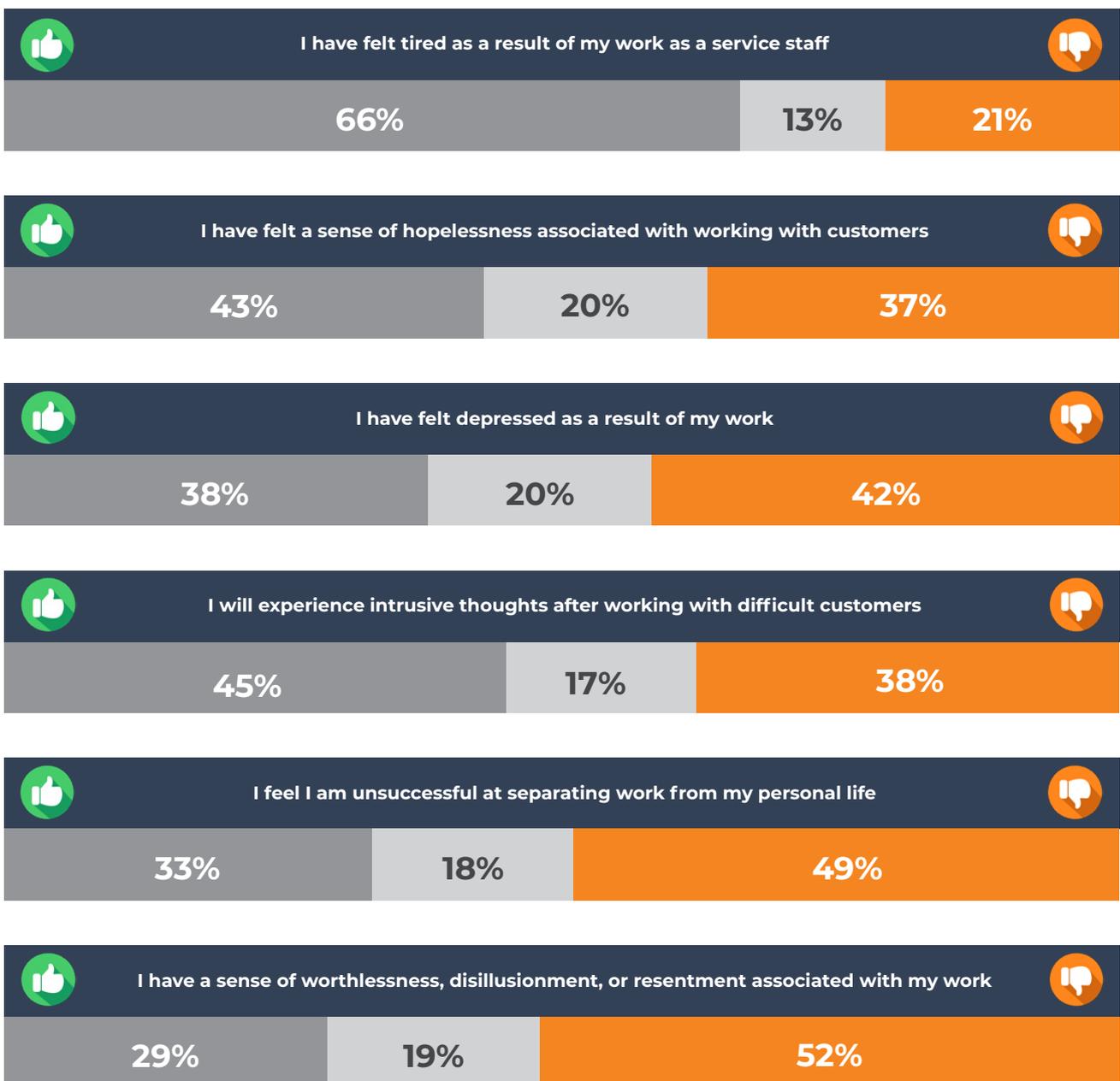
Overall, wellbeing indicators present a mixed picture across the hospitality and tourism workforce. Burnout and bullying and harassment remain material concerns, particularly for younger and neurodivergent workers, while workplace safety knowledge and safety climate continue to be strong.

Burnout

Respondents reported experiencing signs of burnout, with many workers feeling emotionally drained and struggling to maintain boundaries between work and personal life. While feelings of hopelessness and stress after difficult customer interactions are common, fewer staff express deep resentment or a complete inability to separate work from home.

FIGURE 19: BURNOUT

■ AGREE ■ NEUTRAL ■ DISAGREE



Burnout is unevenly distributed across roles and groups, with higher rates among people managers and hospitality employees compared with their counterparts in tourism. Younger workers are particularly exposed, with burnout declining steadily with age, suggesting early-career roles carry a disproportionate emotional and psychological load. Gender, pay, location, business size, tenure, and qualification level show no strong statistical relationship with burnout.

Neurodivergent employees report substantially higher levels of burnout than their neurotypical peers. Over half (54%) of neurodivergent respondents reported experiencing burnout, compared with less than a quarter (22%) of neurotypical workers, indicating a significant support and inclusion gap. While nearly half of all respondents (48%) agree that action is taken against bullying and discrimination based on neurodivergence, this still suggests considerable room for improvement in organisational responses.



Workplace Bullying and Harassment

Bullying and harassment remain significant concerns in hospitality and tourism workplaces, with 35% of respondents reporting personal experiences of bullying and harassment (PEBH) in the workplace and 36% witnessing such behaviour. Reports of bullying have increased compared to previous years, rising from 23% in 2022 to 35% in 2025. In addition, many employees face work-related pressures such as ignored opinions, unreasonable deadlines, and excessive monitoring, contributing to stress and burnout. In 2025 customers were found to be the main offenders of PEBH.

FIGURE 20: BULLYING AND HARASSMENT: COMPARISON 2022 - 2025

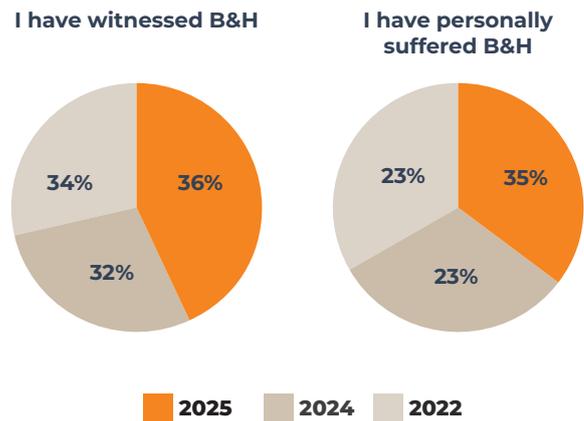
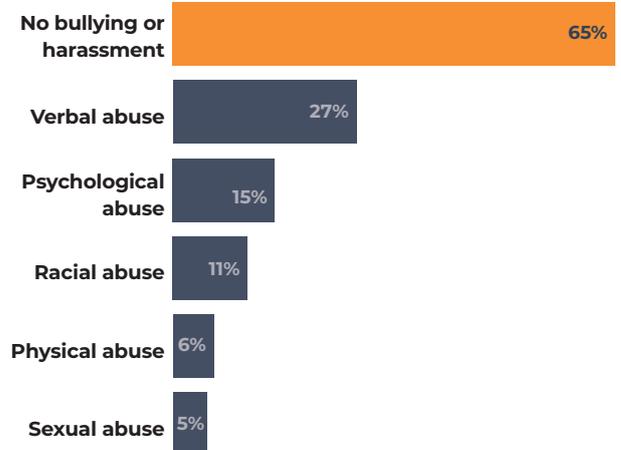


FIGURE 21: PERSONAL EXPERIENCES OF WORKPLACE BULLYING AND HARASSMENT



Rates of reported PEBH in the workplace are strongly concentrated in the lower pay bands with 48% those earning less than \$21.50 per hour reporting PEBH, while only 20% those earning between \$35-50 per hour report PEBH.

Neurodivergent respondents report personal experiences of bullying and harassment (PEBH) at markedly higher rates (51%) than neurotypical workers (32%). Māori workers also experience elevated mistreatment, with 42% reporting PEBH compared with 30% of New Zealand European workers. Higher rates are also reported by Pasifika (53%) and Indian (48%) respondents, while Filipino workers report the lowest levels (19%).

Experiences of Work-related Bullying Behaviours

The average agreement rate across six items indicating experiences of work-related bullying behaviours was **37%** among hospitality and tourism respondents.

TABLE 26: EXPERIENCES OF WORK-RELATED BULLYING BEHAVIOURS

Question	Agree	Disagree	Neutral
Someone withholding information which affects your performance	31%	49%	20%
Being ordered to do work below your level of competence	36%	44%	20%
Having your opinions ignored	43%	40%	17%
Being given tasks with unreasonable deadlines	36%	46%	18%
Excessive monitoring of your work	37%	45%	18%
Pressure not to claim something to which by right you are entitled (e.g. sick leave, holiday entitlement, travel expenses)	36%	48%	16%

Digging Deeper

Cross-tabulated results present responses from a six-item scale of work-related bullying and harassment behaviours (WRBH) behaviours experienced (Table 26). For cross-tabulation purposes, the six-item WRBH scale was recoded into a yes-no indicator.

Age is strongly related to WRBH behaviours experienced, with **33%** of the youngest employees (less than 25) reporting WRBH, the rate falls to 17% of those 55-64, and 14% of those over 65. Employees who manage staff **report higher rates** of WRBH than Frontline workers (30% vs 25%). **Hospitality** workers report significantly higher levels of WRBH experienced than Tourism employees (31% + 39% vs 23% + 27%).

WRBH is lowest (16%) in very small workplaces (1-5 staff) and gradually rises to over double the rate (36%) in the largest organisations (100+ employees). WRBH is more common in employees with 1-3 years tenure (33%), with all other tenure lengths reporting between 22-27%.

Employees who identify as neurodivergent report having experienced WRBH at **more than twice** the levels (50%) of those who are neurotypical (24%).

Gender, ethnicity, location, and qualification level are not strongly statistically related to WRBH experienced.

WRBH levels positively correlate with career turnover intention, job turnover intention, and burnout.

FIGURE 22: MAIN OFFENDERS OF PERSONAL BULLYING AND HARASSMENT EXPERIENCED



Experiences of bullying and harassment perpetrated by customers nearly doubled between 2024 and 2025, signalling increasing pressures on frontline staff.

TABLE 27: OMPARISON 2022-2025 OF MAIN OFFENDERS OF B&H WITNESSED

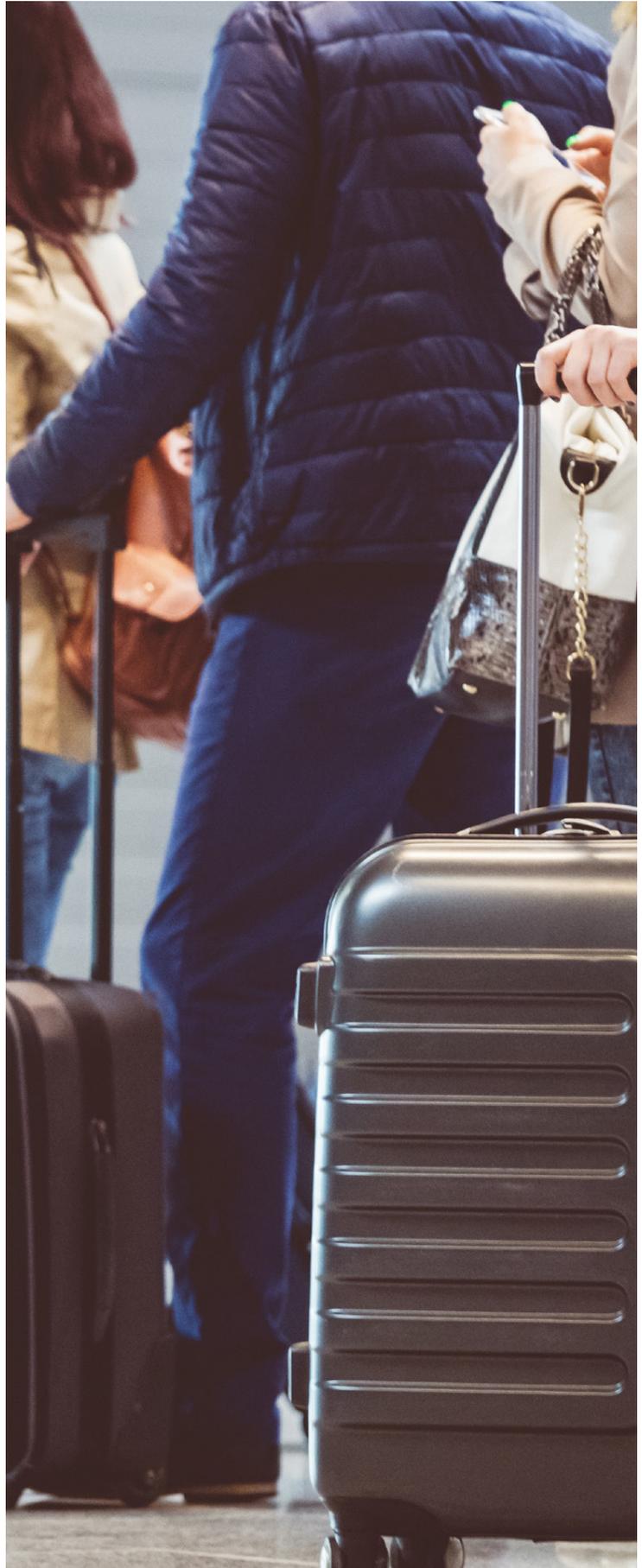
B&H Offenders	2025	2024	2022
Co-workers/Other Employees	55%	35%	XX
Owners/Managers/Supervisors	51%	39%	XX
Customers	51%	26%	XX

43%

Felt a **sense of hopelessness** associated with working with customers

35%

Have personally experienced workplace bullying and harassment – with **customers being the main offender**



Witnessing Workplace Bullying

36% of respondents personally witnessed some form of workplace bullying. Verbal abuse was the most prevalent behaviour (83%), followed by psychological (42%) and then racial abuse (32%). Physical (15%) and sexual abuse (14%) were less common but still notable indicators of harm.

FIGURE 23: MAIN TYPES OF BULLYING AND HARASSMENT



Main offenders of workplace bullying witnessed

Reports of bullying or harassment witnessed mostly involved co-workers or other employees (55%), followed closely by owners/managers/supervisors and customers (both 51%). Incidents involving suppliers or contractors were rare, making up only 2% of reported cases.

Workplace Safety Knowledge and Climate

Workplace safety knowledge and climate remain strong across the sector, with consistently high levels of agreement regarding both individual understanding of workplace safety (WPS) requirements and perceptions of organisational WPS climate. On average the agreement rate across three WPS knowledge items was 89% among hospitality and tourism respondents.

TABLE 28: WORKPLACE SAFETY KNOWLEDGE

Question	Agree	Disagree	Neutral
I know how to perform my job in a safe manner	91%	3%	6%
I know how to use safety equipment and standard work procedure	88%	5%	7%
I know how to reduce the risk of accidents and incidents in the workplace	88%	4%	8%

FIGURE 24: WORKPLACE SAFETY CLIMATE
 The average agreement rate across 6 WPS climate items was **77%** among hospitality and tourism respondents.



91%

I know how to perform my job in a safe manner

78%

The health and safety of workers is a high priority with management where I work





Conclusion

Hospitality and tourism in Aotearoa New Zealand continue to attract workers through strong social connection, flexibility, and the satisfaction of creating positive experiences. This report shows many employees have high levels of passion and pride in the work they perform. In 2025, workforce attitudes toward productivity and organisational profitability remain strong, and overall workplace dignity and job satisfaction has improved slightly. In this sense, the sector offers meaningful work for many.

However, the central challenge facing hospitality and tourism is retention. Across the findings, a clear pattern emerges in which early enthusiasm gives way to strain as careers progress. Workers indicate they move through an emotional arc: enjoyment and commitment, followed by a plateau where skills and responsibilities increase faster than pay, stability, and support, which can lead to burnout, disengagement, and eventual exit from the sector.

People are
attracted by the
NATURE
of the work

But they ***leave***
because of the
CONDITIONS
of the work

Hospitality and tourism work often suits early-career needs, offering flexibility and rapid entry, but becomes harder to sustain as financial and other responsibilities grow. The evidence suggests that many workers do not leave because they dislike the work itself, but because the conditions of work no longer appeal. These risks are not evenly distributed. Turnover intentions and burnout are concentrated among younger and shorter-tenure employees, particularly in hospitality and mid-sized workplaces. Alongside this churn exists a stable cohort of older, longer-tenured employees who have found sustainable pathways within the industry, suggesting that retention is achievable when conditions align with life-stage requirements.

There are **clear opportunities for strengthening futures**. Improvements in training, promotion opportunities, and workplace dignity demonstrate that change is possible. Career commitment is strongly shaped by fair pay, progression, training, and respectful treatment, reinforcing that retention depends on organisational choices rather than individual resilience.

Emerging boundary-setting behaviours suggest workers are making efforts to manage strain, signalling both warning signs and opportunities for more sustainable job design. Experiences of bullying, harassment, and emotional exhaustion highlight the growing importance of psychosocial safety. Neurodivergent employees face especially elevated risks, pointing to missed opportunities for inclusion and retention.

Work to strengthen futures for workforce retention and performance will require sustained attention to inclusion, innovation, pay, progression, and wellbeing. If these conditions are addressed, the sector's strong foundations of productivity and passion can be built upon.





Recommendations

Hospitality and tourism are not constrained by worker motivation, but by the conditions that enable sustained participation. Retention and productivity are shaped by progression, training quality, pay adequacy, workplace dignity, and safety, not by individual resilience or passion alone.

These recommendations focus on strengthening workforce retention, capability, and wellbeing in hospitality and tourism, building on existing initiatives and evidence from the Strengthening Futures report.

STABILISE

Create conditions that make staying viable

TARGET EARLY-CAREER RETENTION AS A PRODUCTIVITY PRIORITY

Focus workforce and training initiatives on workers under 30 and within their first three years, aligning early-career development with clear pay and progression signals to reduce churn and protect productivity investment.

PROGRESS

Turn skills and experience into recognised career advancement

FRAME RETENTION AND EXPERIENCE AS CORE PRODUCTIVITY ASSETS, SUPPORTING VALUED CAREERS ACROSS THE LIFE COURSE

Embed workforce stability and tenure as explicit productivity metrics in sector strategy and workforce planning. Ensure pay scales, training pathways, and public messaging reflect that hospitality and tourism careers build valuable expertise over time, not just entry-level experience.

INCLUDE

Make good work accessible to the people already in the sector

EMBED NEURODIVERSITY-INCLUSIVE PRACTICE ACROSS EXISTING WORKFORCE GUIDANCE, WITH A CLEAR EMPHASIS ON RETENTION

Integrate neurodiverse-inclusive approaches that reduce bullying, sensory overwhelm, burnout, and early exit for neurodivergent workers, recognising that these workers form a significant portion of the hospitality and tourism workforce and face elevated risks without such supports. These practices – such as clearer communication, predictable processes, reasonable accommodations, capability-building for managers, and sensory-aware environments – reduce retention risks for neurodivergent workers and can also enhance workplace culture, wellbeing, and retention outcomes for the wider workforce.

PROTECT

Treat psychosocial harm as a core employment risk

EXPLICITLY RECOGNISE CUSTOMER-DRIVEN HARM IN SAFETY FRAMEWORKS AND SET CLEAR STANDARDS

Ensure health and safety practice properly covers customer-driven bullying and harassment as a primary psychosocial risk for employees, and support sector-wide standards that set clear expectations for customer behaviour and zero tolerance for abuse.

FUTURE-PROOF

Build capability and sustainability for the next phase of growth

ALIGN DIGITAL INVESTMENT WITH FRONTLINE USE AND LONG-TERM WORKFORCE DEVELOPMENT

Ensure digital and AI tools are designed for practical use in frontline roles – such as scheduling, training support, and service delivery – and help workers build skills and experience over time.





Final words from respondents

“ **The people are the best part.** You learn to work with different personalities, build strong teams, and handle challenges under pressure. **The industry also teaches valuable life skills** such as patience, leadership, and emotional control. Every day feels different, and that variety keeps it interesting.

“ The work can be directly translated into other people’s wonderful experiences, such as the gratitude after helping guests solve their travel problems, and making guests feel warm recognition in strange cities. This kind of feedback of **“being needed and creating happiness”** is very intuitive and creates a strong sense of accomplishment.



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