MBIE TOURISM SENTIMENT SURVEY

Summer 2025/26
Report of Findings

April 2026

MINISTRY OF BUSINESS, INNOVATION & EMPLOYMENT
HĪKINA WHAKATUTUKI

ISO 20252 CERTIFIED

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1. BACKGROUND, OBJECTIVES, METHODOLOGY & SAMPLE



Background

The ***Tourism Sentiments Survey*** (TSS) is an online survey conducted twice a year to collect **New Zealanders' perspectives on the impact of tourism across the country and within individual regions.**

The survey is funded by the Ministry of Business, Innovation and Employment (MBIE) and conducted by Ipsos.

It aims to deliver consistent and reliable tourism insights to enable sustainable decision-making.

This topline report details findings from Wave 1, reflecting sentiments post summer 2025/26.





Objectives

The MBIE TTS seeks to better understand:

1. Sentiment towards tourism in New Zealand overall
2. The perceived impact of tourism in New Zealand
3. Sentiment towards tourism in different regions
4. How New Zealanders engage with tourism

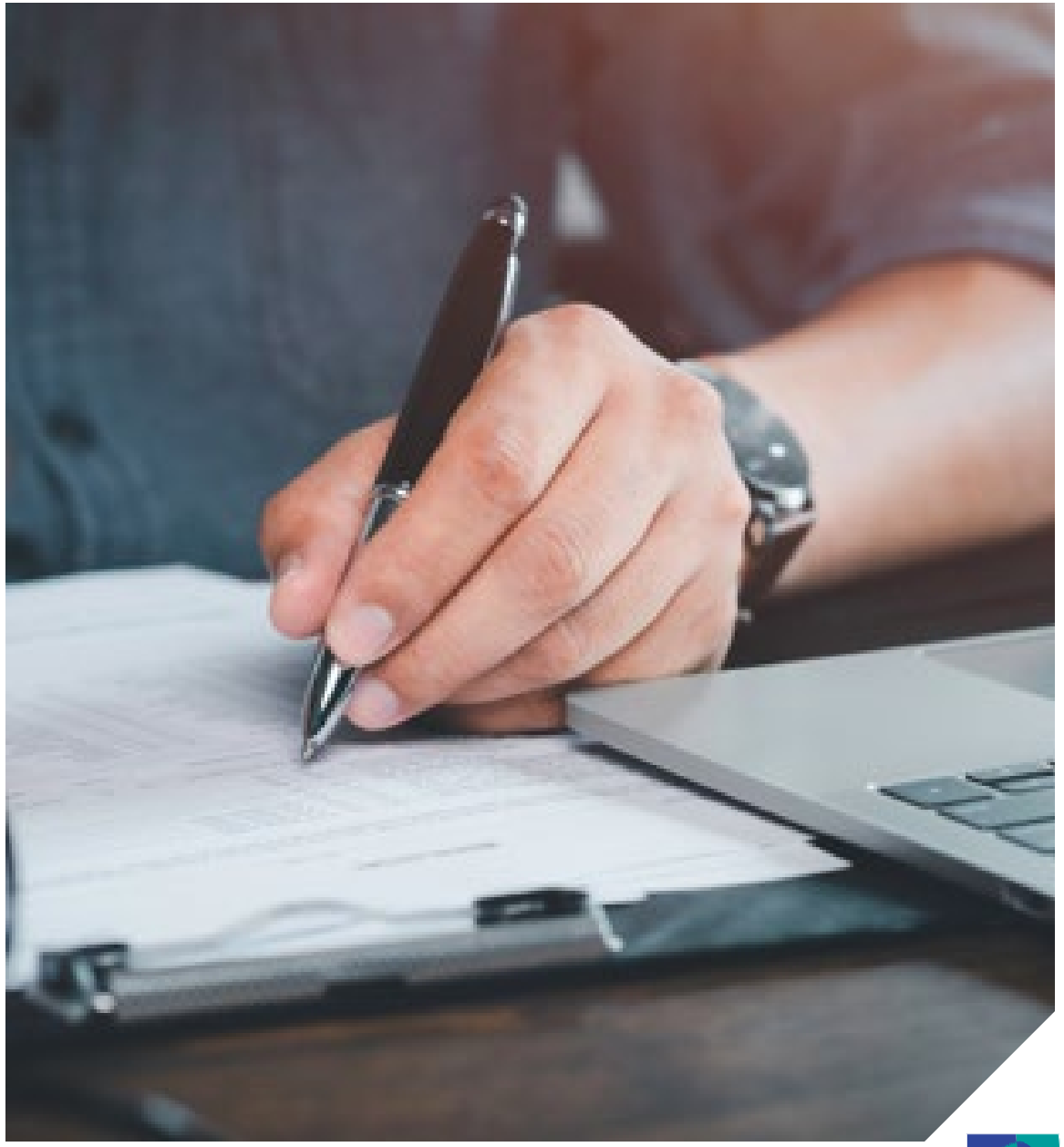
These objectives were designed in collaboration with MBIE, taking into account the needs of different stakeholders.

The report is structured around these 4 objectives.

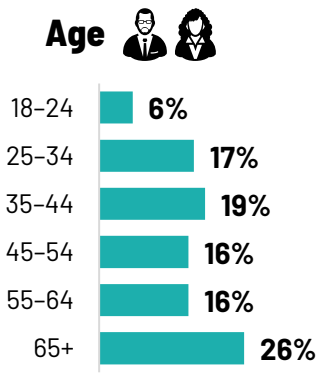
Summer 2025/26

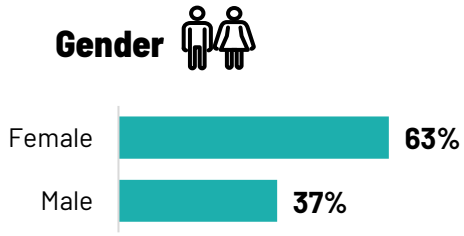
This topline report details findings from Wave 1, reflecting sentiments post-summer 2025/26.

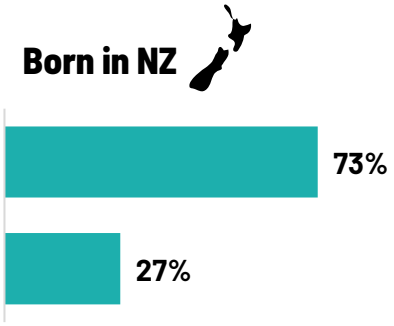
- **Fieldwork was conducted 9 Feb–9 Mar 2026**; the survey took 12 minutes on average to complete.
- Participants shared views on tourism over the summer period – Dec 2025–Feb 2026.
- **2,238 New Zealanders** took part in this wave.
- Participants were recruited via a blend of multiple online panels and non-panel sample sources.
- **Findings are representative of the NZ adult population.**
  - Strategic oversampling of participants from smaller regions and tourist hot spots (or destinations of interest) enabled analysis at the regional level.
  - All findings are weighted by region, age and gender in line with the 2023 NZ census population data.
- Quality assurance was maintained through rigorous survey development, employing cognitive testing, piloting, strict processes, and data cleaning to eliminate low-quality responses, such as overly fast completions. Please note that due to rounding, numbers presented may not add up precisely to the totals provided.

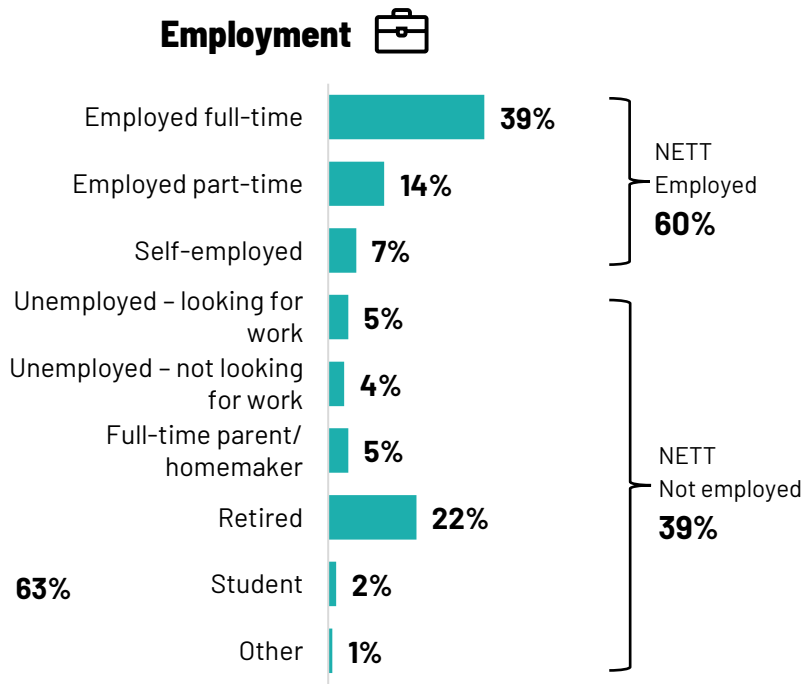


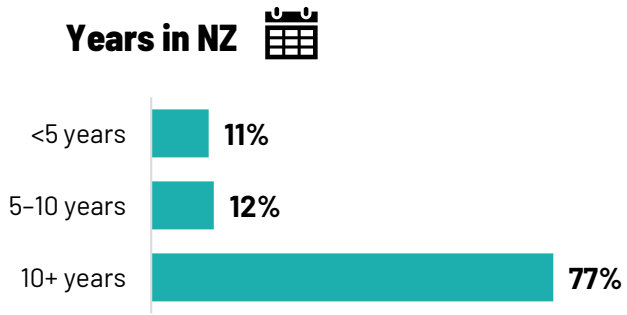
Summer 2025/26 achieved sample demographics *(unweighted)*

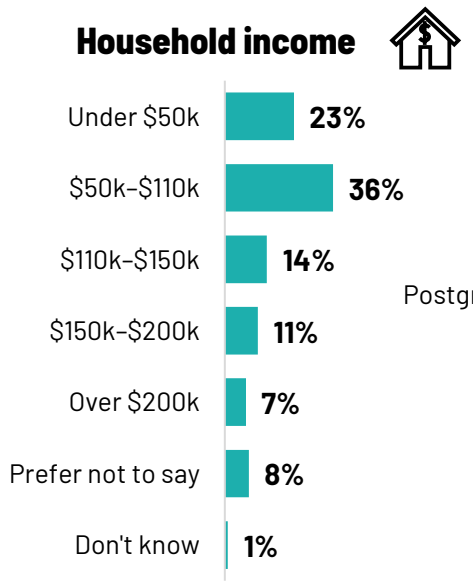


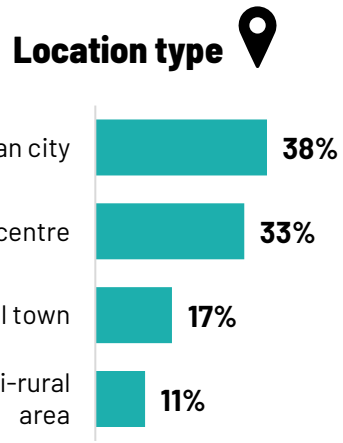


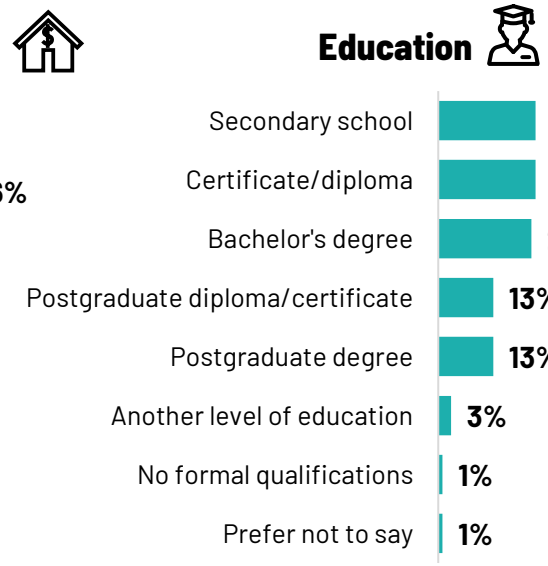


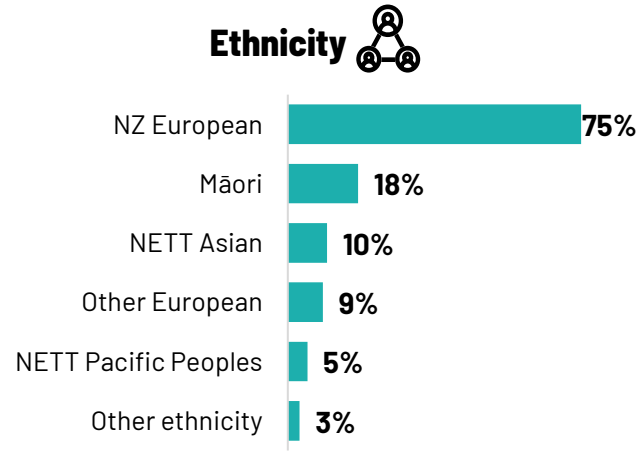












YEAR/MONTH: *What is your date of birth? /* ***GENDER:*** *Are you...? /* ***D0:*** *Which of the following best describes where you usually live? /* ***D5:*** *What is your current employment status? /* ***NZ01ETH:*** *Which ethnic group(s) do you belong to? Please select all that apply. /* ***D6:*** *What is the combined annual income of your household from all sources before tax? /* ***D4:*** *What is your highest completed educational qualification? /* ***QD1:*** *Were you born in New Zealand? /* ***QD2:*** *How many years, in total, have you been living in New Zealand?*

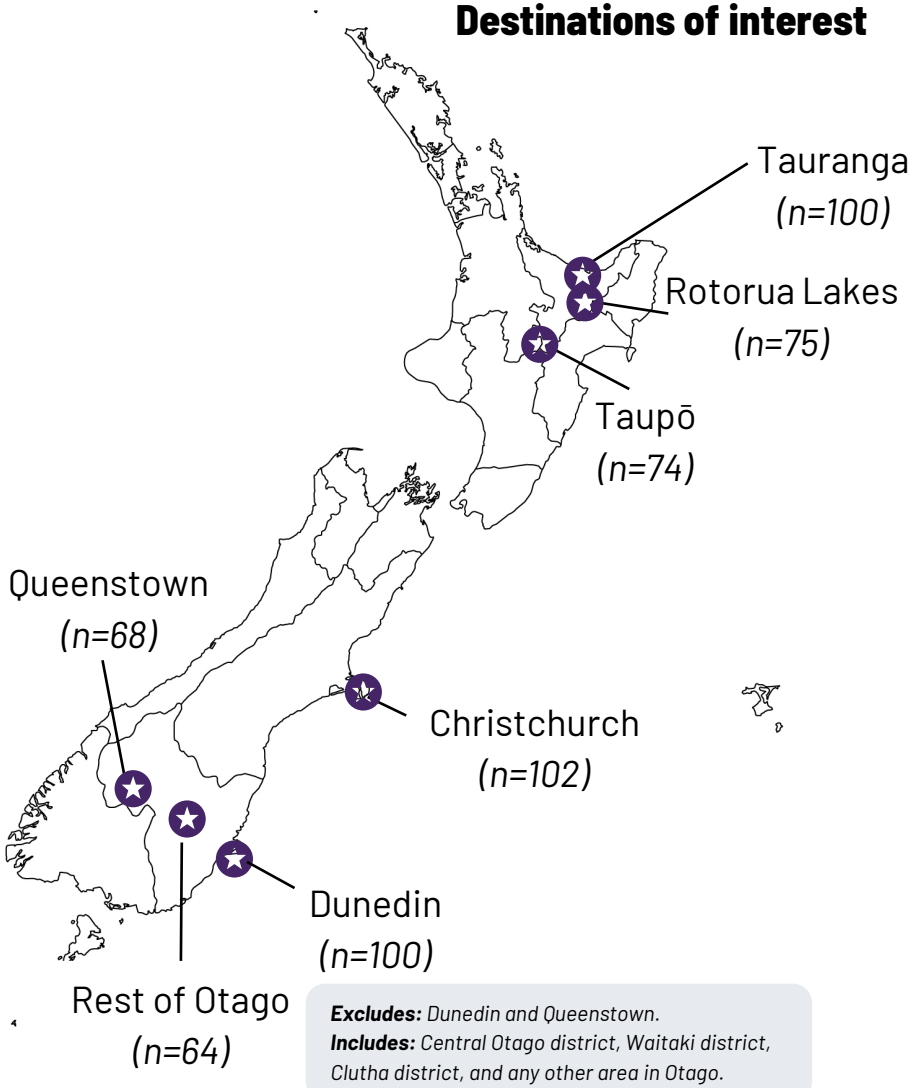
Base: *Total sample (n=2,238)*

Summer 2025/26 achieved sample demographics (continued) *(unweighted)*

Regions

		2023 Census %
Northland *(n=102)*	5%	4%
Auckland *(n=352)*	16%	33%
Waikato *(n=265)*	12%	10%
Bay of Plenty *(n=226)*	10%	6%
Gisborne *(n=74)*	3%	1%
Hawke's Bay *(n=99)*	4%	3%
Manawatū-Whanganui *(n=100)*	3%	5%
Taranaki *(n=75)*	4%	2%
Wellington *(n=150)*	7%	11%
Tasman *(n=98)*	4%	1%
Nelson *(n=75)*	3%	1%
Marlborough *(n=75)*	3%	1%
West Coast *(n=65)*	3%	1%
Canterbury *(n=150)*	7%	13%
Otago *(n=232)*	10%	5%
Southland *(n=100)*	4%	2%

Destinations of interest



Excludes: *Dunedin and Queenstown.*
Includes: *Central Otago district, Waitaki district, Clutha district, and any other area in Otago.*

All regions and destinations of interest (DOIs) achieved a minimum sample size of 60, ensuring a reasonable level of reliability in the results at the regional level.

However, caution is advised when interpreting data from regions with smaller achieved samples (e.g. West Coast n=65), as precision may be lower.

Credibility intervals by region and DOI can accessed by contacting MBIE at tr_sharedmailbox@mbie.govt.nz

QREGION: *Which region do you live in? Please select one only.* / ***BOP_LOCATION:*** *Which district of the Bay of Plenty region do you live in? Please select one only.* / ***WAIKATO_LOCATION:*** *Which district of the Waikato region do you live in? Please select one only.* / ***CANTERBURY LOCATION:*** *Which district of the Canterbury region do you live in? Please select one only.* / ***OTAGO_LOCATION:*** *Which district of the Otago region do you live in? Please select one only.*

Base: *Total sample (n=2,238)*

Interpretation note

Demographic differences

▲/▼ or **green**/**red** is statistically significantly **higher**/**lower** (at the 95% level) **compared to the total**.

+/**-** is statistically significantly **higher**/**lower** when **comparing domestic tourism to international tourism**.

Definitions

NZ summer period refers to the December–February period.

International tourism, when people living in other countries visit/holiday in New Zealand for less than 12 months.

International visitors are people living in other countries who visit/holiday in New Zealand for less than 12 months.

Domestic tourism, when people living in New Zealand visit/holiday in other NZ areas/regions for less than 12 months.



2. KEY INSIGHTS



Key findings

Objective 1. Sentiment towards tourism in New Zealand overall

9 out of 10 New Zealanders think that tourism benefits New Zealand.

Nearly half of the population feels there's 'about the right number' of international (48%) and domestic (48%) visitors. However, there is appetite to increase tourism as about one third think there are 'not enough' international (31%) and domestic (36%) visitors, with a stronger preference for domestic visitors.

New Zealanders favour international visitors who are visiting friends and family, travelling as international students, or coming as families. In contrast, 37% wish to see fewer campers, campervans, and van travellers staying outside built facilities.

Objective 2. Perceived impact of tourism in New Zealand

When considering tourism's impact on New Zealand as a whole, international visitors are perceived to have a more positive impact on the NZ economy, whereas domestic visitors positively influence community life, the natural environment, and NZ values and culture. This sentiment is echoed by 95% of New Zealanders who see tourism as economically beneficial, with highlights on *economic growth for New Zealand* (60%) and *creates employment or income opportunities* (59%), economic growth is particularly noted among Aucklanders.

Over 80% of New Zealanders see the primary negative impacts of tourism affecting the environment (83%) and community/everyday life (81%). Key negative aspects include *increases in litter and waste*, *holiday accommodation being too expensive for NZ residents*, and *reliance on seasonal, low-wage employment*. South Island regions particularly flag *increased traffic issues* as a significant concern.

Objective 3. Sentiment towards tourism in different regions

86% believe that tourism benefits their region, with the highest agreement in Nelson, West Coast, Gisborne, and Otago, where over 90% see tourism positively. Manawatū-Whanganui residents are less likely to agree.

83% of New Zealanders across all regions highlight the *boost to the local economy* as the key benefit of both international and domestic tourism. This was particularly noticed in Nelson, while Manawatū-Whanganui residents are less likely to agree.

More than a quarter in all regions except Tasman and Otago feel that they lack enough international visitors in summer; 25% of residents in Tasman and 26% in Otago feel there are too many.

Across all regions, domestic visitors are preferred over international ones. At least 25% feel they lack enough domestic visitors in summer, apart from in Tasman (14%) and Bay of Plenty (8%), which report having too many (compared to 4% total).

Objective 4. How New Zealanders engage with tourism

Some 11% of New Zealanders have worked in the tourism sector in the past year.

Over 80% haven't had the opportunity to voice their opinions on tourism development nor know where to express concerns, but 27% want to be more involved in these decisions.

During summer, nature tourism is popular among New Zealanders, with over half visiting *beaches* (53%) and others enjoying *public gardens* (36%) and *scenic walks/lookouts* (29%). Engagement varies regionally based on local offerings.

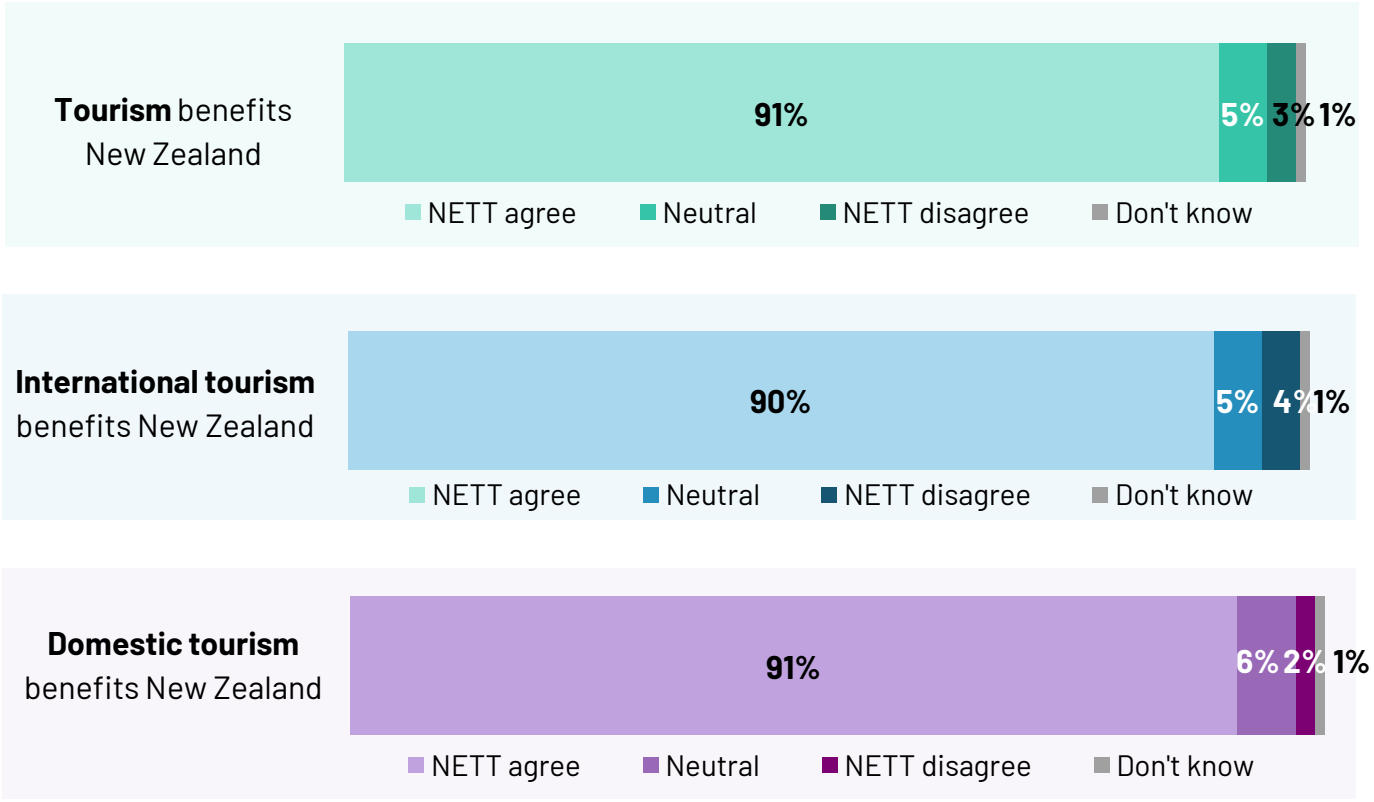
3. Objective 1
OVERALL SENTIMENT TOWARDS TOURISM IN NEW ZEALAND



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Views on tourism in New Zealand today

Across the country, 9 out of 10 think international & domestic tourism benefits New Zealand. Nationally, only 1% see tourism *as one of the most important issues facing New Zealand today, with* cost of living/inflation, healthcare & the economy *selected as more pressing problems.*



Those **significantly more likely** to agree that **tourism benefits New Zealand...**

HH income $150k–$200k ***(97%)***

Other European ***(96%)***

Bachelor's degree ***(95%)***

Aged 65+ years ***(95%)***

Not born in New Zealand ***(94%)***

Those **significantly less likely** to agree that **tourism benefits New Zealand...**

Unemployed ***(89%)***

HH income under $50k ***(88%)***

Aged 25–34 years ***(88%)***

Māori ***(87%)***

Secondary school ***(85%)***

1% of people selected **tourism** as one of the three **most important issues** facing New Zealand.

Significantly more likely to select ***tourism*** as a **top-3 most important issue facing New Zealand:**

Live in Bay of Plenty ***(4%)*** */ Tasman* ***(4%)***

Leading issues selected:

Inflation/cost of living **62%**

Healthcare/hospitals **39%**

The economy **34%**

green/red is statistically significantly **higher/lower** than the total

Q1: *What would you say are the three most important issues facing New Zealand today? Please select exactly 3 options. /* ***Q2:*** *How much do you agree or disagree with the following statements about tourism in New Zealand?*
Base: *Total sample (n=2,238)*

Number of international & domestic visitors in NZ over the summer

Almost half of New Zealanders feel there is 'about the right number' of international (48%) & domestic (48%) visitors & for about one third there are 'not enough' international (31%) & domestic (36%) visitors. More domestic tourism is encouraged; higher percentages of New Zealanders believe there are 'too many' international visitors vs domestic ones (10% vs 5%) & there are 'not enough' domestic visitors vs international visitors (36% vs 31%).

Those significantly more likely to agree that there are too many international visitors in New Zealand...
*Live in Queenstown **(33%)** / Tasman **(30%)** / rest of Otago **(22%)** / Otago **(21%)***
*Aged 18–24 years **(19%)** / 35–44 years **(14%)***
*Have worked in tourism sector **(18%)***

Those significantly more likely to agree that there is about the right number of international visitors in New Zealand...
*Live in West Coast **(66%)** / Gisborne **(65%)***
*Have lived in their region 3–6 years **(56%)***

Those significantly more likely to agree that there are not enough international visitors in New Zealand...
*Indian **(47%)** / NETT Asian **(39%)***
*Live in Rotorua Lakes **(44%)** / Northland **(43%)** / Auckland **(38%)***
*Aged 55–64 years **(38%)** / 65+ years **(36%)***
*Not born in New Zealand **(36%)***
*HH income $150k–$200k **(36%)***

International visitors in New Zealand are...



Domestic visitors in New Zealand are...



Those significantly more likely to agree that there are too many domestic visitors travelling within New Zealand...
*Live in Tasman **(18%)***
*Indian **(14%)** / NETT Asian **(10%)***
*Have worked in tourism sector **(11%)***
*Aged 35–44 years **(8%)***

Those significantly more likely to agree that there is about the right number of domestic visitors travelling within New Zealand...
*Live in Taranaki **(60%)***
*Have lived in their region 3–6 years **(56%)***

Those significantly more likely to agree that there are not enough domestic visitors travelling within New Zealand...
*Māori **(46%)***
*Live in Waikato **(43%)***

Q3/Q5: *Thinking about tourism in New Zealand during the summer period (December–February), in your opinion, do you think there are...*
Base: *Total sample (n=2,238)*

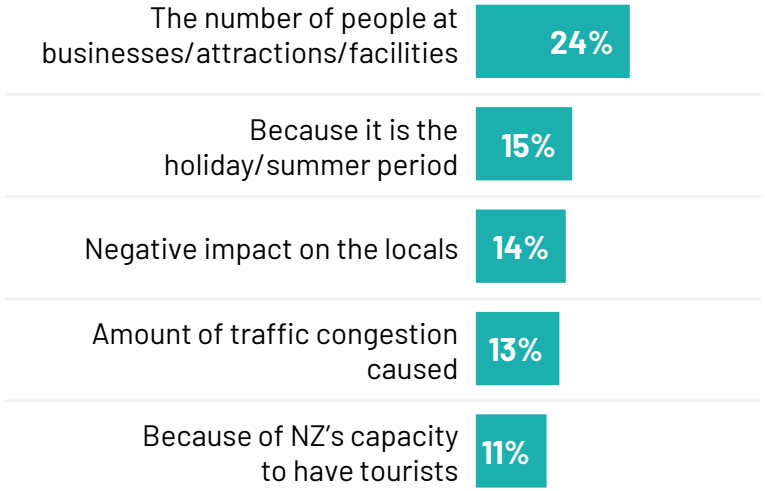
green/red is statistically significantly higher/lower than the total

+/- is statistically significantly higher/lower when comparing domestic tourism to international tourism

Reasons for perceptions of number of international visitors

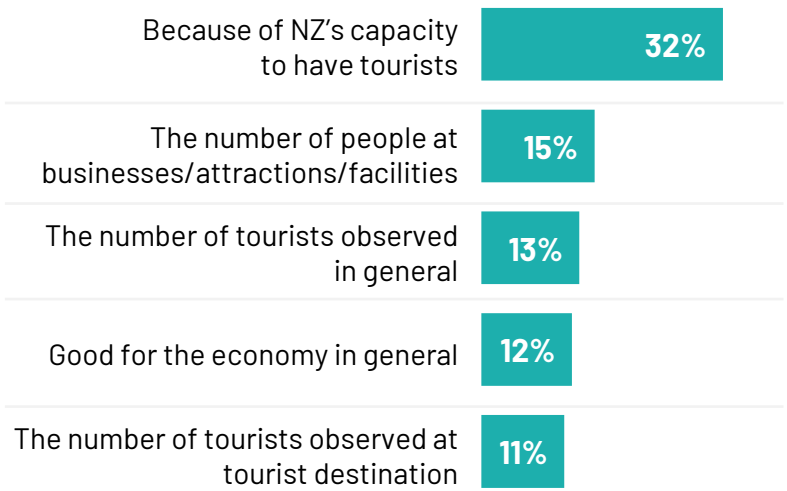
New Zealand's capacity to have tourists *was a compelling reason why the vast majority of New Zealanders considered there to be the 'right number' (48%) or 'not enough' (31%) international visitors. Among the 10% of New Zealanders who thought there were 'too many' international visitors, 24% mentioned* the number of people at businesses, attractions & facilities.

10% Too many international visitors: Top-5 themes



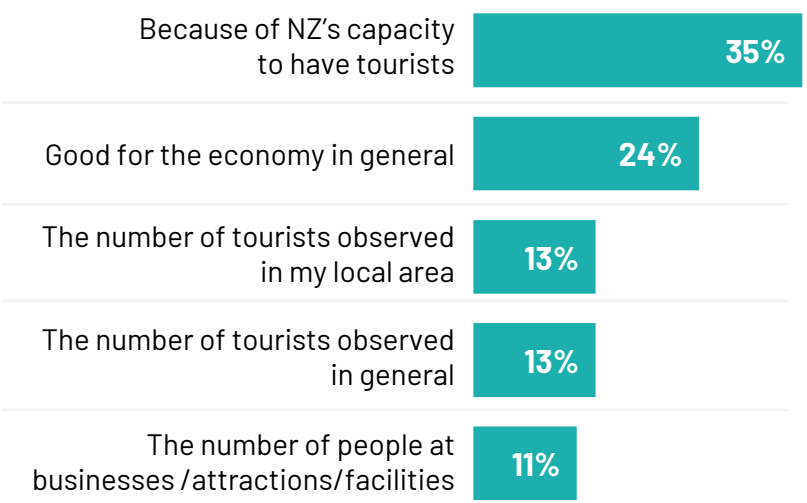
"Lots of popular destinations get really busy and overcrowded. Our infrastructure in NZ can not cope with this number of people."
– aged 18–24, Auckland

48% Right number of international visitors: Top-5 themes



"Places we have visited during the summer are busy and buzzing with excitement. Good to see businesses flourish during this time."
– aged 35–44, Auckland

31% Not enough international visitors: Top-5 themes



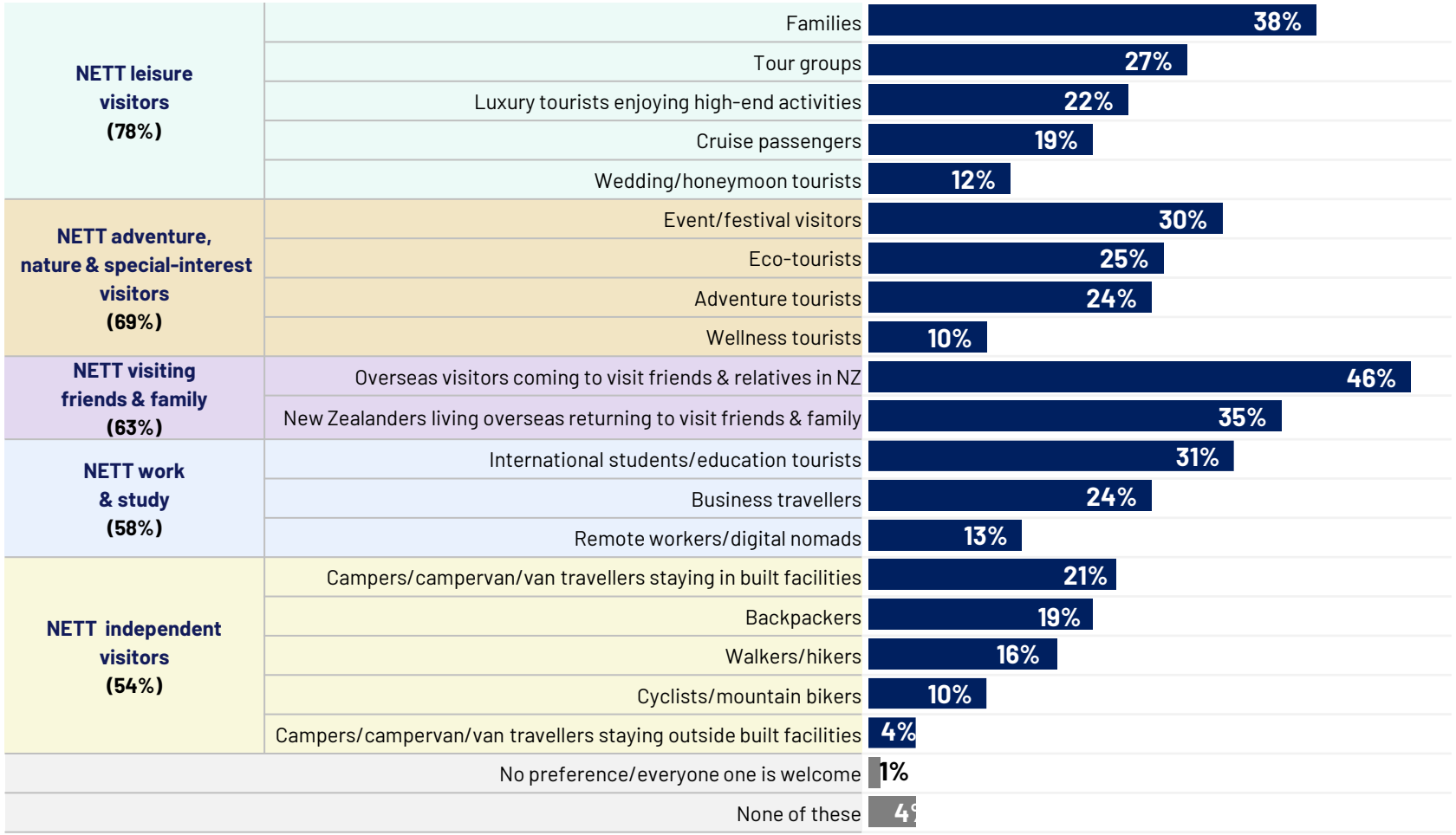
"Numbers are still below the pre-Covid period which affects businesses geared to the tourism sector."
– aged 65+, Northland

Q4: *What is it that makes you think that there are too many / about the right number of / not enough international visitors in NZ over the summer? [open-ended question]*
Base: *Those who stated – 'too many' (n=282), 'the right number' (n=1,127), 'not enough' (n=626)*

International visitors New Zealanders want to see more of

New Zealanders expressed a preference for more international visitors who come to visit friends & family, *as well as* families, international students/ education tourists, event/festival visitors & tour groups.

Types of international visitors you would like to see more of in your region



Significantly more likely to want to see more NETT leisure visitors...

*Aged 65+ years **(87%)***

*Male **(83%)***

Significantly more likely to want to see more NETT adventure, nature & special-interest visitors...

*Have worked in tourism sector **(81%)***

*Aged 65+ years **(74%)***

Significantly more likely to want to see more NETT visiting friends & family...

*NETT Pacific Peoples **(73%)***

*Unemployed **(68%)***

*Aged 65+ years **(68%)***

Significantly more likely to want to see more NETT work & study...

*Indian **(72%)** / NETT Pacific Peoples **(70%)***

*Have worked in tourism sector **(69%)***

Significantly more likely to want to see more NETT independent visitors...

*Have worked in tourism sector **(69%)***

*HH income under $50k **(60%)***

*Unemployed **(58%)***

See regional differences on next page

***Visitor type grouping:** NETT % visitor type groupings are the people who selected at least one visitor type within the group i.e. 78% of participants selected at least one of the visitor types that belongs to the 'NETT leisure visitors' grouping.*

***Q15:** What type of international visitors would you prefer to see more of in your region? [multiple choice] / **Base:** Total sample (n=2,238)*

green/red is statistically significantly higher/lower than the total

International visitors New Zealanders want to see more of in their region

Type of international visitors I would prefer to see more of in my region	Total (n=2,238)	Northland (n=102)	Auckland (n=352)	Waikato (n=265)	Bay of Plenty (n=226)	Gisborne (n=74)	Hawke's Bay (n=99)	Taranaki (n=75)	Manawatū-Whanganui (n=100)	Wellington (n=150)	Tasman (n=98)	Nelson (n=75)	Marlborough (n=75)	West Coast (n=65)	Canterbury (n=150)	Otago (n=232)	Southland (n=100)
Families	**38%**	48%▲	36%	39%	37%	43%	40%	41%	52%▲	32%	37%	37%	46%	45%	36%	34%	45%
Tour groups	**27%**	32%	28%	36%▲	32%	23%	23%	19%	23%	28%	24%	20%	29%	22%	20%	21%	35%
Luxury tourists enjoying high-end activities	**22%**	16%	26%	17%	19%	8%▼	24%	23%	9%▼	17%	32%▲	33%▲	19%	13%	28%	23%	20%
Cruise passengers	**19%**	29%▲	20%	8%▼	24%	26%	28%▲	23%	1%▼	21%	11%	22%	29%▲	7%▼	23%	20%	8%▼
Wedding/honeymoon tourists	**12%**	10%	16%▲	11%	10%	16%	17%	8%	6%	10%	14%	10%	11%	9%	8%	16%	7%
Event/festival visitors	**30%**	27%	26%	34%	28%	30%	28%	40%	39%	40%▲	15%	28%	36%	20%	32%	28%	25%
Eco-tourists	**25%**	29%	26%	26%	17%▼	31%	28%	17%	17%	27%	27%	27%	36%▲	41%▲	23%	32%▲	33%
Adventure tourists	**24%**	18%	28%	25%	26%	14%	24%	14%	20%	13%▼	23%	29%	21%	35%	25%	26%	31%
Wellness tourists	**10%**	14%	10%	11%	15%▲	10%	8%	7%	14%	7%	21%▲	12%	17%	7%	12%	8%	4%▼
Overseas visitors coming to visit friends & relatives in NZ	**46%**	49%	43%	47%	43%	41%	50%	45%	53%	47%	39%	41%	52%	53%	52%	49%	45%
NZers living overseas returning to visit friends & family	**35%**	40%	35%	34%	36%	43%	35%	48%	45%	31%	33%	32%	26%	37%	34%	37%	36%
International students/education tourists	**31%**	25%	29%	29%	30%	26%	29%	23%	41%	34%	15%▼	18%▼	19%▼	18%▼	36%	42%▲	35%
Business travellers	**24%**	11%▼	31%▲	18%▼	18%▼	10%▼	13%▼	19%	14%▼	31%	17%	13%▼	26%	10%▼	30%	15%▼	17%
Remote workers/digital nomads	**13%**	15%	15%	11%	12%	9%	12%	11%	8%	18%	22%▲	13%	11%	19%	11%	11%	9%
Campers/campervan/van travellers staying in built facilities	**21%**	28%	15%▼	25%	30%▲	26%	19%	32%▲	23%	13%▼	39%▲	26%	42%▲	41%▲	21%	26%	26%
Backpackers	**19%**	28%▲	16%	20%	23%	17%	18%	17%	21%	24%	9%▼	9%▼	7%▼	17%	17%	17%	27%
Walkers/hikers	**16%**	12%	14%	20%	14%	11%	10%	22%	18%	12%	26%▲	20%	16%	25%	20%	16%	21%
Cyclists/mountain bikers	**10%**	2%▼	7%	15%▲	12%	5%	12%	8%	12%	9%	21%▲	19%▲	11%	21%▲	12%	18%▲	11%
Campers/campervan/van travellers staying outside built facilities	**4%**	3%	4%	5%	6%	4%	7%	8%	5%	1%	1%	6%	2%	12%▲	2%	2%	7%
None of these	**4%**	5%	4%	3%	3%	1%	4%	2%	4%	6%	4%	2%	0%	0%	2%	2%	3%
No preference/everyone one is welcome	**1%**	1%	1%	0%	0%	0%	2%	2%	0%	1%	0%	1%	0%	0%	0%	0%	0%
Other	**0%**	0%	0%	0%	1%	1%	0%	0%	0%	0%	0%	1%	1%	3%	0%	0%	0%
Don't know	**0%**	0%	0%	0%	1%	0%	0%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%

▲/▼ is statistically significantly **higher/lower** than the total

Q15: *What type of international visitors would you prefer to see more of in your region? [multiple choice]*

Visitor type groupings:

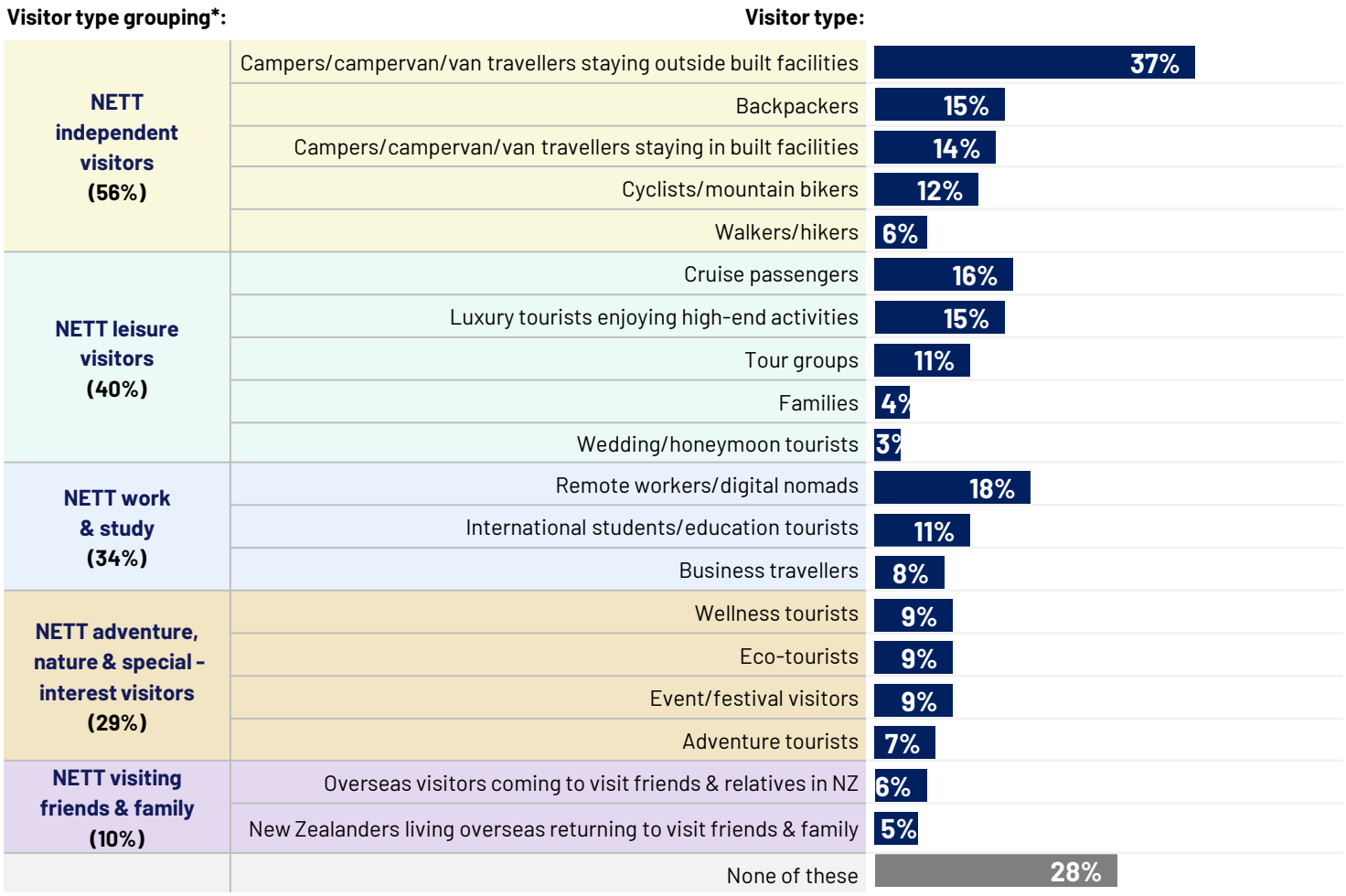
Leisure visitors	**Work & study**
Adventure, nature, special-interest visitors	**Independent visitors**
Visiting friends & family	

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International visitors New Zealanders want to see less of

37% of New Zealanders expressed a desire to see fewer campers, campervans & van travellers staying outside built facilities *compared to any other type of international visitor. This preference is notably higher than for fewer* remote workers *(18%)* & cruise passengers *(16%).*

Types of international visitors you would like to see less of in your region



***Visitor type grouping:** NETT % visitor type groupings are the people who selected at least one visitor type within the group i.e. 56% of participants selected at least one of the visitor types that belongs to the 'NETT independent visitors' grouping.*

***Q16:** What type of international visitors would you prefer to see less of in your region? [multiple choice] / **Base:** Total sample (n=2,238)*

Significantly more likely to want to see less NETT independent visitors...

Have worked in tourism sector (66%)
Aged 65+ years (64%) & 55-64 years (62%)

Significantly more likely to want to see less NETT leisure visitors...

Aged 18-24 years (57%) / 35-44 years (46%)
Have worked in the tourism sector (57%)
Not born in New Zealand (45%)

Significantly more likely to want to see less NETT work & study...

NETT Pacific Peoples (55%) / Māori (41%)
Have worked in tourism sector (50%)
Aged 18-24 years (44%) / 35-44 years (41%)

Significantly more likely to want to see less NETT adventure, nature & special-interest visitors...

Aged 65+ years (74%)
Have worked in tourism sector (48%)
NETT Pacific Peoples (45%) / Māori (38%)
HH income under $50k (37%)
Male (35%)

Significantly more likely to want to see less NETT visiting friends & family...

Have worked in the tourism sector (23%)
Aged 18-24 years (20%)
NETT Pacific Peoples (20%) / NETT Asian (15%)
HH income under $50k (15%)
Male (14%)

See regional differences on next page

green/red is statistically significantly higher/lower than the total

International visitors New Zealanders want to see less of in their region

Type of international visitors I would prefer to see less of in my region	Total (n=2,238)	Northland (n=102)	Auckland (n=352)	Waikato (n=265)	Bay of Plenty (n=226)	Gisborne (n=74)	Hawke's Bay (n=99)	Taranaki (n=75)	Manawatū-Whanganui (n=100)	Wellington (n=150)	Tasman (n=98)	Nelson (n=75)	Marlborough (n=75)	West Coast (n=65)	Canterbury (n=150)	Otago (n=232)	Southland (n=100)
Campers/campervan/van travellers staying outside built facilities	**37%**	44%	32%	36%	31%	30%	35%	34%	29%	36%	52%▲	53%▲	50%▲	49%	43%	52%▲	39%
Backpackers	**15%**	11%	17%	12%	15%	13%	13%	16%	17%	9%	20%	25%▲	20%	7%	14%	18%	7%▼
Campers/campervan/van travellers staying in built facilities	**14%**	8%	15%	12%	14%	6%	8%	17%	19%	11%	17%	12%	12%	9%	12%	17%	18%
Cyclists/mountain bikers	**12%**	10%	13%	11%	7%▼	7%	13%	6%	19%	11%	16%	8%	11%	10%	11%	10%	9%
Walkers/hikers	**6%**	4%	6%	7%	7%	3%	7%	14%▲	6%	4%	7%	7%	4%	5%	4%	4%	4%
Cruise passengers	**16%**	10%	13%	14%	10%▼	19%	19%	16%	16%	26%▲	21%	18%	13%	19%	14%	22%▲	23%
Luxury tourists enjoying high-end activities	**15%**	18%	16%	15%	12%	21%	15%	10%	18%	15%	14%	15%	8%	23%	13%	14%	15%
Tour groups	**11%**	13%	10%	10%	13%	10%	13%	16%	9%	5%▼	15%	13%	7%	15%	11%	16%▲	18%▲
Families	**4%**	5%	3%	5%	9%▲	10%▲	7%	11%▲	0%▼	4%	8%	6%	3%	4%	4%	7%▲	2%
Wedding/honeymoon tourists	**3%**	3%	2%	6%▲	8%▲	2%	4%	6%	4%	5%	6%	4%	2%	3%	1%	3%	1%
Remote workers/digital nomads	**18%**	21%	20%	18%	26%▲	12%	15%	23%	19%	15%	22%	23%	20%	20%	14%	14%	21%
International students/education tourists	**11%**	14%	13%	13%	16%	9%	14%	7%	3%▼	6%	18%	8%	6%	5%	12%	9%	11%
Business travellers	**8%**	9%	9%	6%	8%	12%	11%	7%	7%	9%	7%	7%	4%	17%▲	6%	10%	8%
Wellness tourists	**9%**	6%	9%	11%	10%	11%	17%▲	9%	6%	11%	10%	5%	10%	12%	4%	8%	15%
Eco-tourists	**9%**	8%	10%	8%	10%	6%	11%	13%	5%	8%	15%▲	8%	11%	9%	8%	10%	10%
Event/festival visitors	**9%**	15%	8%	11%	11%	18%▲	10%	10%	6%	6%	12%	10%	9%	13%	10%	8%	7%
Adventure tourists	**7%**	7%	8%	10%	12%▲	15%▲	11%	6%	4%	5%	11%	6%	5%	6%	4%	10%	11%
Overseas visitors coming to visit friends & relatives in NZ	**6%**	5%	7%	5%	5%	7%	7%	7%	3%	6%	13%▲	1%	3%	2%	5%	5%	3%
NZers living overseas returning to visit friends & family	**5%**	1%	5%	5%	10%▲	1%	9%	4%	4%	3%	6%	3%	9%	3%	4%	6%	6%
None of these	**28%**	26%	28%	25%	27%	25%	31%	29%	38%▲	31%	6%▼	20%	25%	13%▼	32%	20%▼	27%
Other	**0%**	0%	1%	0%	0%	0%	0%	0%	1%	1%	0%	0%	1%	1%	0%	1%	1%
Don't know	**0%**	1%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%	0%	0%	0%	0%	0%

▲/▼ is statistically significantly higher/lower than the total

Q16: *What type of international visitors would you prefer to see less of in your region? [multiple choice]*

Visitor type groupings:

- Independent visitors
- Leisure visitors
- Work & study
- Adventure, nature, special-interest visitors
- Visiting friends & family

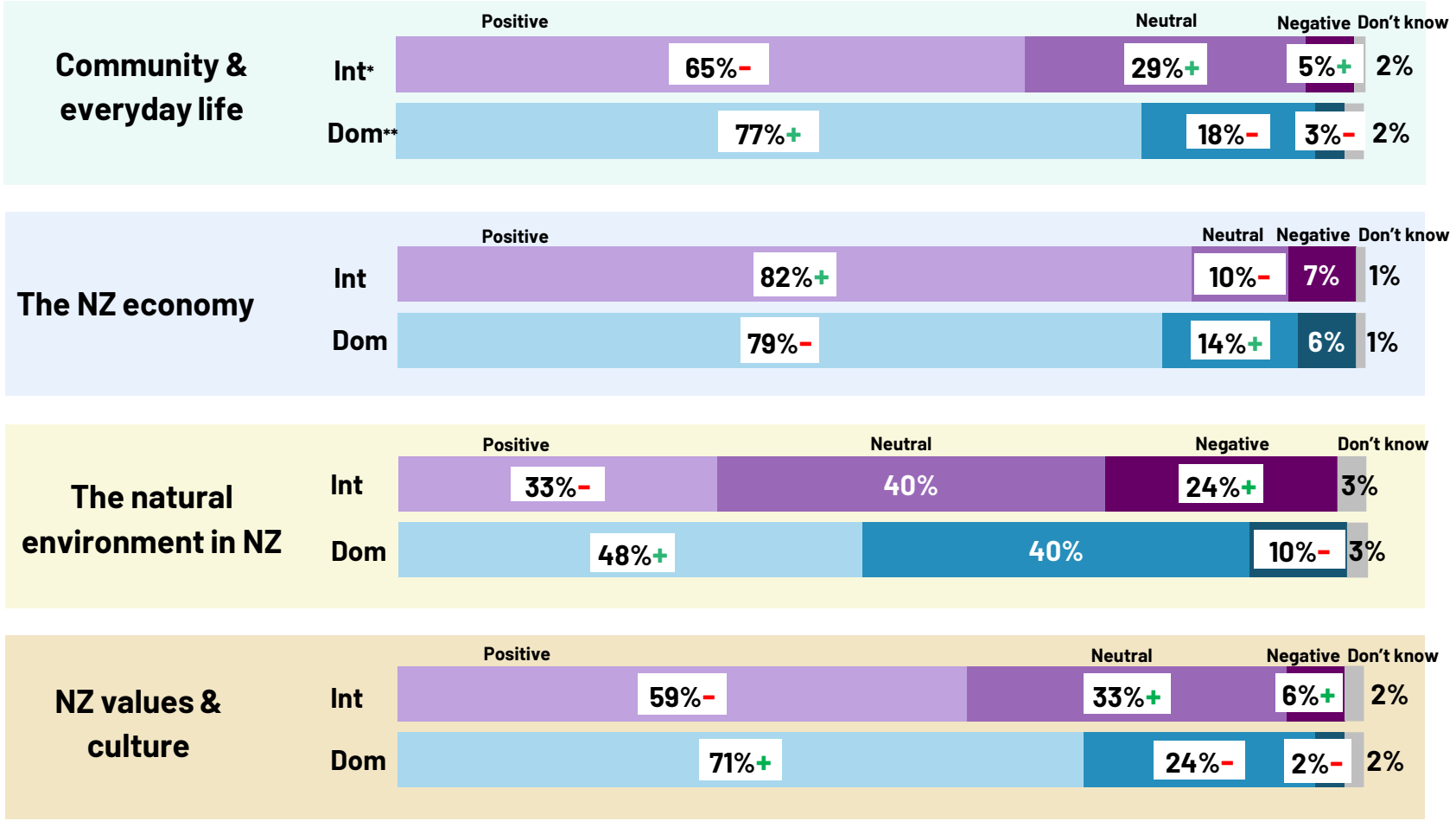
4. Objective 2 PERCEIVED IMPACT OF TOURISM IN NEW ZEALAND



Impact of international & domestic tourism on New Zealand

Domestic visitors were seen to have a more positive impact than international ones on all aspects apart from the NZ economy. *Perceptions of the impact on the* natural environment *are the least positive for both domestic & international visitors. Gisborne residents are significantly more likely to rate the impact of international visitors positively for three of the four key aspects.*

Impact of international & domestic visitors on key NZ aspects



Significantly more likely to state that tourism positively impacts key NZ aspects...

International:	Domestic:
Community & everyday life	
Northland (79%) / Gisborne (78%) NETT Asian (74%) 65+ (72%)	*NETT Asian (83%)*
The NZ economy	
65+ (94%) / 55-64 (87%) Other European (91%) Nelson (91%) NETT Upper South Island (90%) NETT South Island (85%)	*Nelson (93%) /Tasman (89%) Other European (87%) 55-64 (85%) / 65+ (85%)*
The natural environment in NZ	
NETT Asian (46%) / NETT Pacific Peoples (43%) Gisborne (45%) Rotorua Lakes (42%) Male (37%)	*Tasman (64%) NETT Pacific Peoples (64%) / NETT Asian (60%)*
NZ culture & values	
Gisborne (71%)	*35-44 (79%)*

*Int - international visitors
**Dom - domestic visitors

I6/07: *Now, thinking about international visitors only/domestic visitors, what impacts would you say international/domestic tourism in New Zealand has had on...*

Base: *Total sample (n=2,238)*

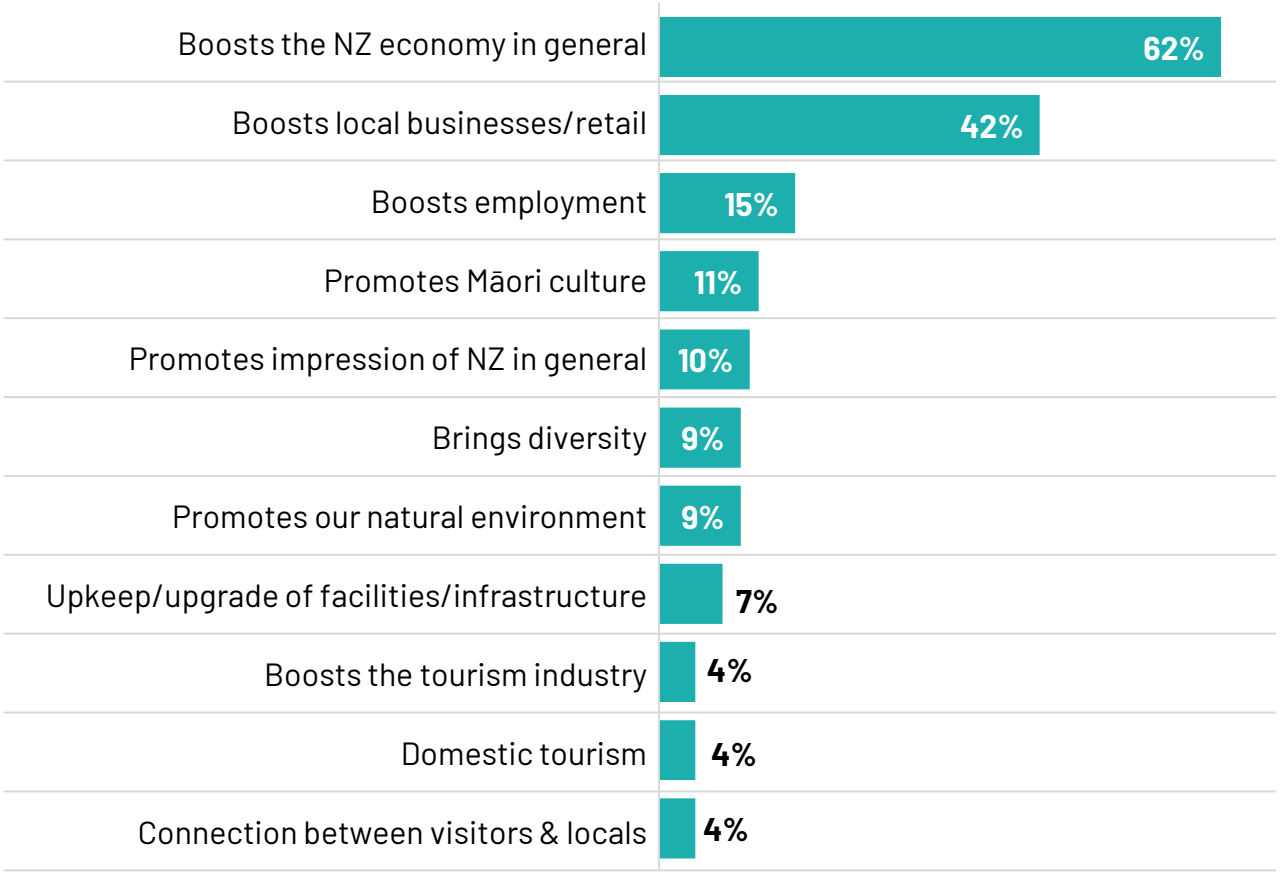
green/red is statistically significantly higher/lower than the total

+/- is statistically significantly higher/lower when comparing domestic tourism to international tourism

Benefits of tourism

Among the 91% of New Zealanders who think that tourism benefits New Zealand, the main unprompted reasons given were related to the benefits to the economy *(62%)* & boosts to local businesses *(42%).*

Benefits of tourism: Top coded responses to open-ended question



"Tourism makes towns feel more lively and connected, with more events, activities, and cultural exchanges happening."
– aged 25–34, Nelson

"Economically, it creates jobs across hospitality, transport, retail, and tour services, and supports many small and regional businesses that rely heavily on visitor spending."
– aged 35–44, Canterbury

"I think tourism is good in general because it brings people from different cultures to New Zealand and it's good for New Zealanders to appreciate that diversity."
– aged 45–54, Nelson

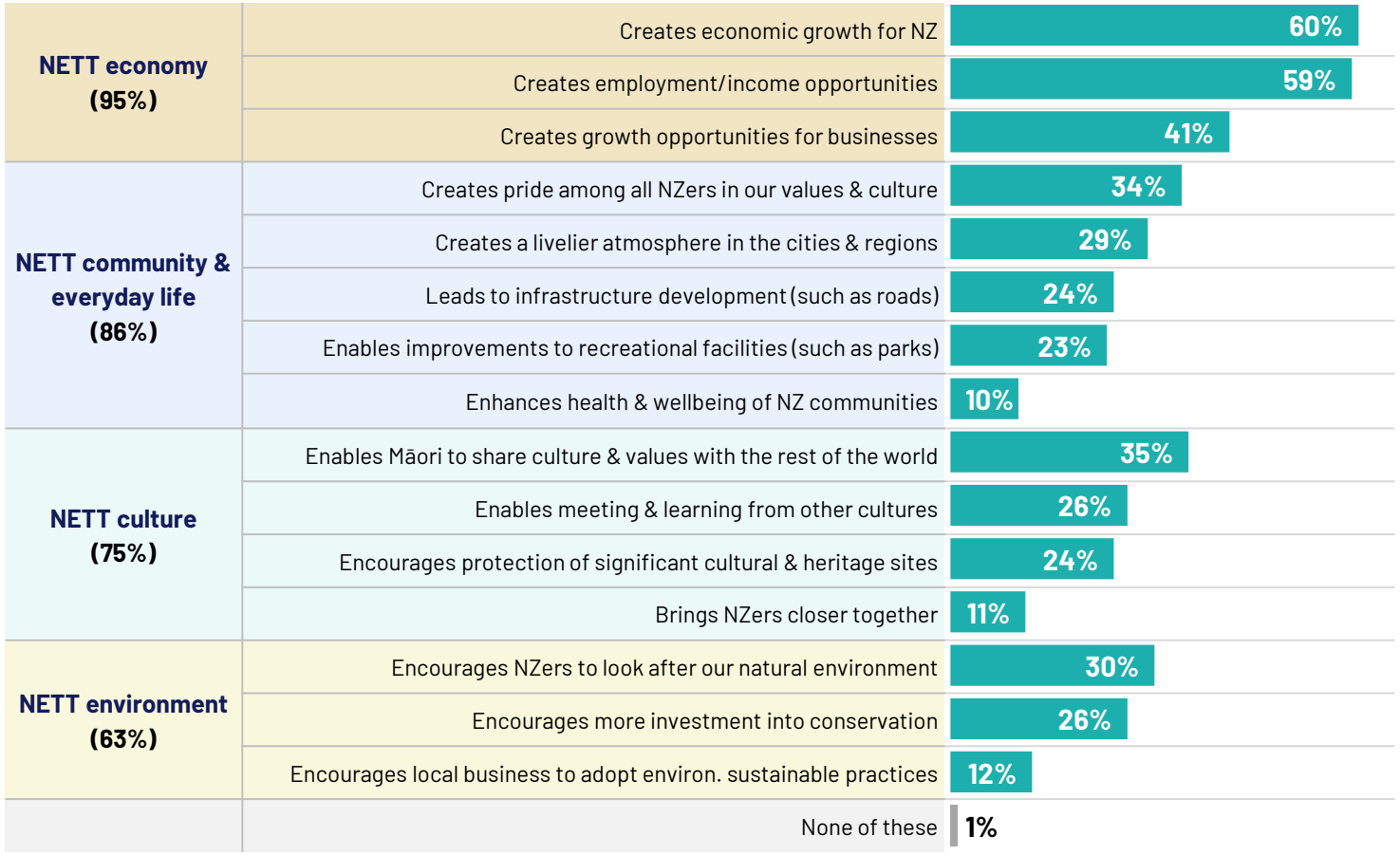
"With New Zealand being a largely environmental tourist destination, the money brought in helps emphasise the importance of our natural environment and encourages us to look after it and appreciate it more."
– aged 25–34, Manawatū-Whanganui

Q8: *What are the most significant benefits of tourism in New Zealand that you've observed or heard about? Please include any notable impacts on the community, economy, environment or culture in New Zealand.*
Base: *Those who think tourism has a positive benefit on New Zealand and provided an answer to the open-text question (n=1,721)*

Benefits of tourism

95% of New Zealanders believe tourism brings economic benefits. Notably, over half highlighted economic growth for New Zealand *(60%) &* creates employment/income opportunities *(59%) as the top advantages. However, Māori (51%) & Pacific Peoples (47%) were significantly less likely to state that tourism* creates economic growth for New Zealand.

Benefits of tourism: Top choices from provided list



Demographic differences by top-2 benefits of tourism

Creates economic growth for New Zealand

Those **significantly more likely** to state...	Those **significantly less likely** to state...
NETT Asian ***(70%)***	*Have worked in tourism sector* ***(51%)*** *Māori* ***(51%)*** */ NETT Pacific Peoples* ***(47%)***

Creates employment/income opportunities

Those **significantly more** likely to state...	Those **significantly less likely** to state...
HH income $150k–$200k ***(69%)*** *Other European* ***(69%)*** *Aged 55–64 years* ***(67%)*** */ 45–54 years* ***(64%)*** */ 65+ years* ***(64%)***	*Aged 25–34 years* ***(53%)*** */ 18–24 years* ***(40%)*** *Have worked in tourism sector* ***(43%)***

See regional differences on next page

***green/red** is statistically significantly **higher/lower** than the total*

***Impact groupings:** NETT % impact groupings are the people who selected at least one benefit within the group i.e. 95% of participants selected at least one of the benefits associated with the 'NETT economy' grouping.*

***Q10:** Please select the top-5 benefits from the options provided. [multiple choice] / **Base:** Total sample (n=2,238)*

Benefits of tourism – by region

Aucklanders are more likely to state that tourism creates economic growth for NZ *(66%), while residents of Bay of Plenty (52%), Wellington (48%) & Gisborne (44%) are significantly less likely to have this perception.*

Benefits of tourism	Total (n=2,238)	Northland (n=102)	Auckland (n=352)	Waikato (n=265)	Bay of Plenty (n=226)	Gisborne (n=74)	Hawke's Bay (n=99)	Taranaki (n=75)	Manawatū-Whanganui (n=100)	Wellington (n=150)	Tasman (n=98)	Nelson (n=75)	Marlborough (n=75)	West Coast (n=65)	Canterbury (n=150)	Otago (n=232)	Southland (n=100)
Creates economic growth for New Zealand	**60%**	55%	66%▲	56%	52%▼	44%▼	60%	56%	62%	48%▼	53%	61%	68%	54%	64%	60%	60%
Creates employment/income opportunities	**59%**	62%	59%	53%	53%	46%▼	57%	60%	52%	68%▲	53%	55%	51%	61%	62%	54%	60%
Creates growth opportunities for businesses	**41%**	45%	45%	37%	30%▼	25%▼	37%	53%▲	30%▼	42%	31%	42%	34%	39%	44%	37%	36%
Creates pride among all New Zealanders in our values & culture	**34%**	38%	31%	30%	36%	41%	26%	27%	31%	33%	40%	29%	32%	38%	45%▲	35%	31%
Creates a livelier atmosphere in the cities & regions	**29%**	20%	33%	28%	23%	30%	24%	37%	20%	32%	20%	37%	33%	35%	28%	27%	33%
Leads to infrastructure development (such as roads)	**24%**	29%	25%	29%	25%	20%	24%	16%	26%	22%	29%	28%	27%	25%	18%	26%	25%
Enables improvements to recreational facilities (such as parks)	**23%**	21%	24%	24%	21%	17%	19%	15%	28%	22%	23%	20%	29%	24%	17%	25%	25%
Enhances health & wellbeing of NZ communities	**10%**	16%	10%	13%	10%	17%	12%	11%	7%	8%	15%	11%	11%	8%	11%	8%	10%
Enables Māori to share their culture & values with the rest of the world	**35%**	36%	34%	35%	44%▲	37%	39%	31%	48%▲	43%	23%▼	17%▼	25%	23%▼	31%	29%	21%▼
Enables meeting & learning from other cultures	**26%**	28%	23%	24%	29%	28%	30%	26%	29%	24%	28%	25%	28%	42%▲	31%	30%	26%
Encourages protection of significant cultural & heritage sites	**24%**	20%	23%	25%	28%	17%	21%	22%	32%	29%	26%	25%	26%	23%	21%	23%	21%
Brings New Zealanders closer together	**11%**	12%	9%	11%	9%	19%▲	20%▲	14%	10%	13%	12%	14%	6%	7%	13%	10%	7%
Encourages New Zealanders to look after our natural environment	**30%**	35%	25%	35%	33%	27%	38%	34%	34%	31%	47%▲	41%	37%	28%	29%	32%	31%
Encourages more investment into conservation	**26%**	29%	26%	28%	23%	25%	23%	27%	25%	24%	27%	21%	29%	24%	29%	29%	21%
Encourages local business to adopt environ. sustainable practices	**12%**	10%	13%	12%	16%	19%	18%	8%	17%	10%	15%	11%	17%	17%	8%	15%	14%
None of these	**1%**	0%	0%	2%	2%	1%	4%	1%	2%	1%	1%	1%	0%	0%	1%	2%	5%▲

▲/▼ is statistically significantly **higher/lower** than the total

Q16: *What type of international visitors would you prefer to see less of in your region? [multiple choice]*

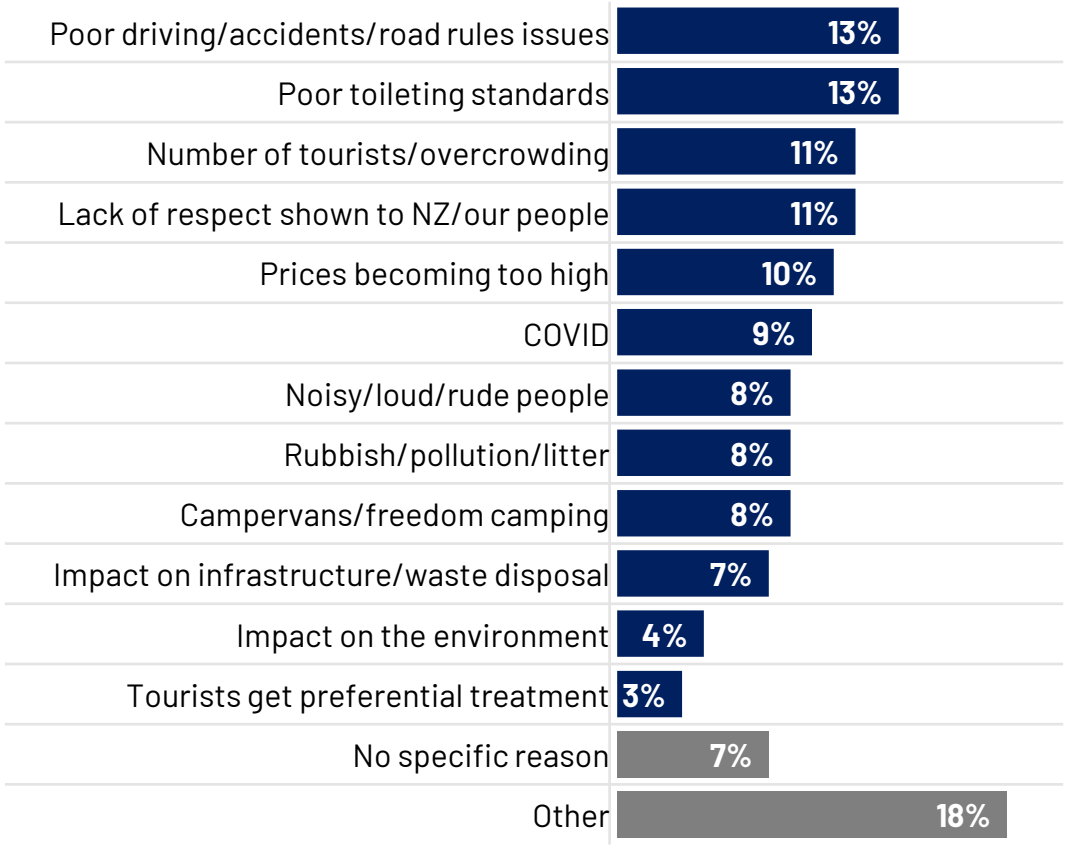
Impact groupings:

Economy	**Culture**
Community & everyday life	**Environment**

Negative impacts of tourism

Among the 3% of New Zealanders who stated that tourism has a negative impact on New Zealand, the top-2 reasons provided were poor driving *(13%)* & poor toileting standards *(13%), likely linked to freedom camping.*

Negative impact of tourism: Top coded responses to open-ended question



"Visitors from overseas drive on our roads as soon as they get off a flight so they're tired and not used to driving on the left and sadly accidents have occurred."

– aged 55–64, Auckland

"When I see vans with no toilet facilities or hear of tourist defaecating in the bush, it makes me angry and have a negative view about tourists."

– aged 55–64 years, Auckland

"It's unpleasant to go places like Queenstown now because of the number of tourists. It also makes accommodation too expensive."

– aged 35–44 years, Southland

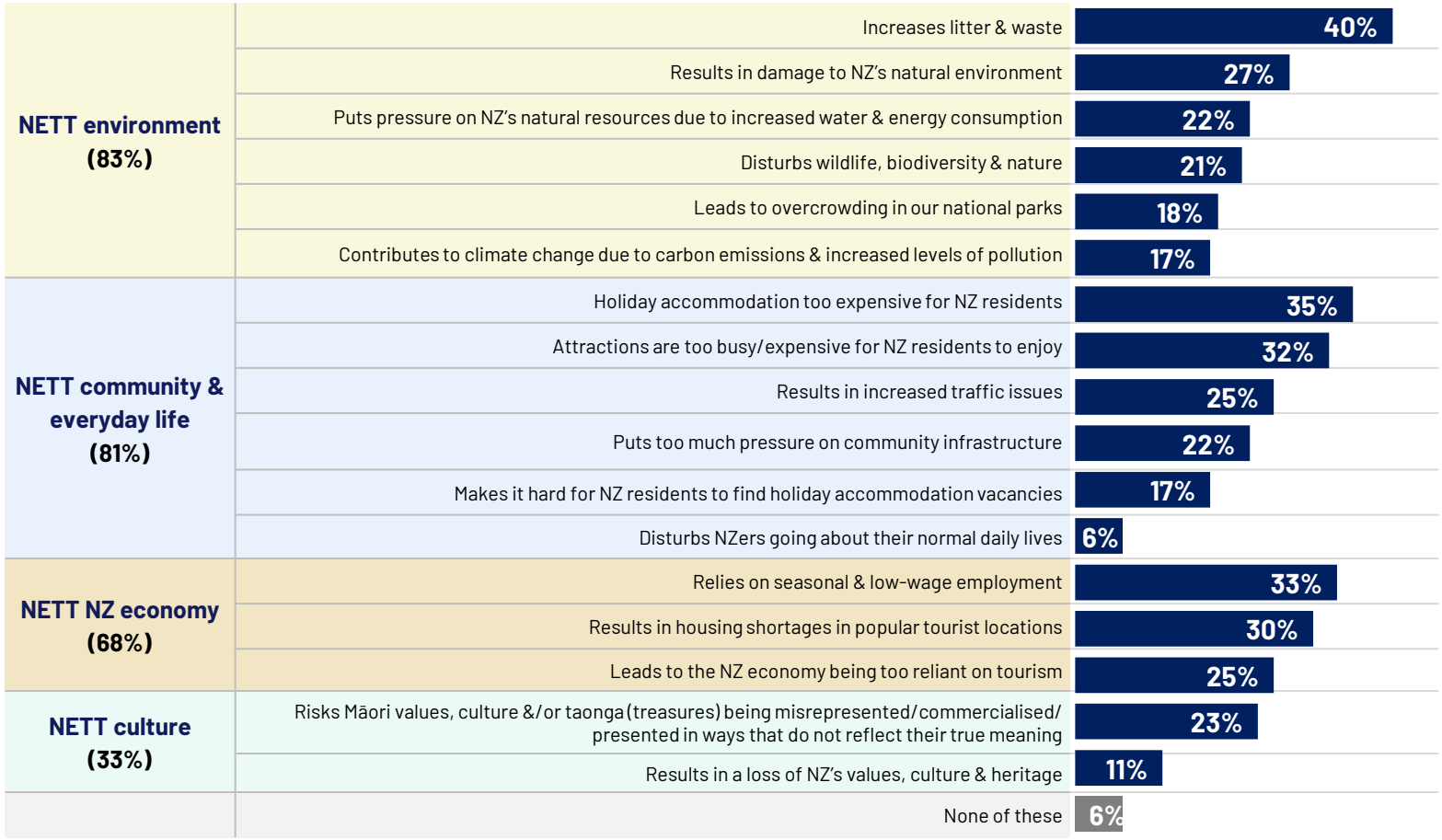
Q9: *Think back to a moment when you felt tourism negatively impacted New Zealand. What was the situation, and how did it affect your view on tourism?*

Base: *Those who think tourism has a negative impact on New Zealand and provided an answer to the open-text question (n=83)*

Negative impacts of tourism

Over 80% of New Zealanders identified the primary negative impacts of tourism as affecting the environment (83%) & community & everyday life (81%). The top-3 specific negative impacts cited were increases in litter & waste *(40%),* holiday accommodation becoming too expensive for NZ residents *(35%)* & reliance on seasonal, low-wage employment *(33%).*

Negative impacts of tourism: Top choices from provided list



Demographic differences by top-2 negative impacts of tourism

Increases litter & waste

Those **significantly more** likely to state...	Those **significantly less likely** to state...
45-54 years ***(49%)***	*Have worked in the tourism sector* ***(33%)***
	55-64 years ***(32%)***
	Other European ***(30%)*** */ NETT Pacific Peoples* ***(24%)***

Holiday accommodation too expensive for NZ residents

Those **significantly more** likely to state...	Those **significantly less likely** to state...
Rural/semi-rural area ***(43%)***	*No significant differences*
Not born in New Zealand ***(39%)***	

See regional differences on next page

***green/red** is statistically significantly **higher/lower** than the total*

***Impact groupings:** NETT % impact groupings are the people who selected at least one negative impact within the group i.e. 83% of participants selected at least one of the negative impacts associated with the 'NETT environment' grouping.*

***Q11:** Please select the top-5 negative impacts that are most concerning to you from the options provided. [multiple choice] / **Base:** Total sample (n=2,238)*

Negative impacts of tourism – by region

Four South Island regions rate increased traffic issues *significantly higher as a negative impact of tourism: Nelson (42%), West Coast (42%), Otago (38%) & Marlborough (36%).*

Negative impacts of tourism	Total (n=2,238)	Northland (n=102)	Auckland (n=352)	Waikato (n=265)	Bay of Plenty (n=226)	Gisborne (n=74)	Hawke's Bay (n=99)	Taranaki (n=75)	Manawatū-Whanganui (n=100)	Wellington (n=150)	Tasman (n=98)	Nelson (n=75)	Marlborough (n=75)	West Coast (n=65)	Canterbury (n=150)	Otago (n=232)	Southland (n=100)
Increases litter & waste	**40%**	45%	39%	45%	35%	24%▼	37%	40%	50%	30%▼	42%	49%	43%	51%	44%	45%	39%
Results in damage to NZ's natural environment	**27%**	30%	30%	25%	24%	28%	15%▼	40%▲	26%	26%	29%	27%	28%	21%	23%	31%	27%
Puts pressure on NZ's natural resources due to increased water & energy consumption	**22%**	24%	21%	22%	23%	18%	23%	19%	21%	27%	16%	16%	31%	17%	19%	22%	26%
Leads to overcrowding in our national parks	**18%**	11%	21%	13%▼	14%	11%	12%	18%	25%	20%	23%	24%	19%	12%	16%	17%	20%
Contributes to climate change due to carbon emissions & increased levels of pollution	**17%**	13%	19%	15%	13%	7%▼	12%	11%	16%	21%	18%	14%	7%▼	9%	16%	15%	11%
Makes holiday accommodation too expensive for NZ residents	**35%**	33%	29%▼	44%▲	37%	33%	37%	27%	40%	42%	43%	42%	36%	33%	33%	35%	39%
Means attractions are too busy/expensive for NZ residents to enjoy	**32%**	30%	25%▼	40%▲	37%	36%	43%▲	32%	36%	33%	30%	40%	30%	36%	38%	32%	30%
Results in increased traffic issues	**25%**	23%	22%	26%	23%	19%	20%	28%	28%	20%	26%	42%▲	36%▲	42%▲	29%	38%▲	32%
Puts too much pressure on community infrastructure	**22%**	27%	20%	16%▼	21%	17%	12%▼	18%	18%	26%	28%	27%	22%	30%	27%	29%▲	20%
Makes it hard for NZ residents to find holiday accommodation vacancies	**17%**	17%	16%	13%	15%	14%	22%	20%	14%	15%	18%	20%	15%	25%	21%	16%	21%
Disturbs NZers going about their normal daily lives	**6%**	4%	6%	7%	7%	4%	8%	10%	9%	5%	10%	6%	2%	12%	4%	8%	9%
Relies on seasonal & low-wage employment	**33%**	28%	33%	31%	28%	24%	35%	25%	27%	45%▲	30%	34%	36%	32%	30%	31%	32%
Results in housing shortages in popular tourist locations	**30%**	34%	26%	35%	27%	29%	28%	25%	31%	31%	49%▲	26%	27%	22%	34%	39%▲	37%
Leads to the NZ economy being too reliant on tourism	**25%**	22%	22%	28%	25%	24%	30%	36%▲	27%	23%	17%	30%	34%	27%	27%	29%	23%
Risks Māori values, culture &/or taonga (treasures) being misrepresented/ commercialised/presented in ways that do not reflect their true meaning	**23%**	23%	22%	27%	34%▲	29%	24%	30%	34%▲	26%	25%	12%▼	12%▼	28%	13%▼	16%▼	17%
Disturbs wildlife, biodiversity & nature	**21%**	19%	24%	19%	21%	27%	22%	24%	21%	18%	16%	15%	11%▼	15%	20%	19%	18%
Results in a loss of NZ's values, culture & heritage	**11%**	12%	11%	9%	18%▲	10%	10%	12%	10%	7%	13%	5%	13%	9%	11%	11%	12%
None of these	**6%**	6%	8%	5%	6%	4%	11%	5%	2%	6%	1%	2%	7%	0%▼	6%	5%	6%

▲/▼ is statistically significantly higher/lower than the total

Impact groupings:

Environment	Economy
Community & everyday life	Culture

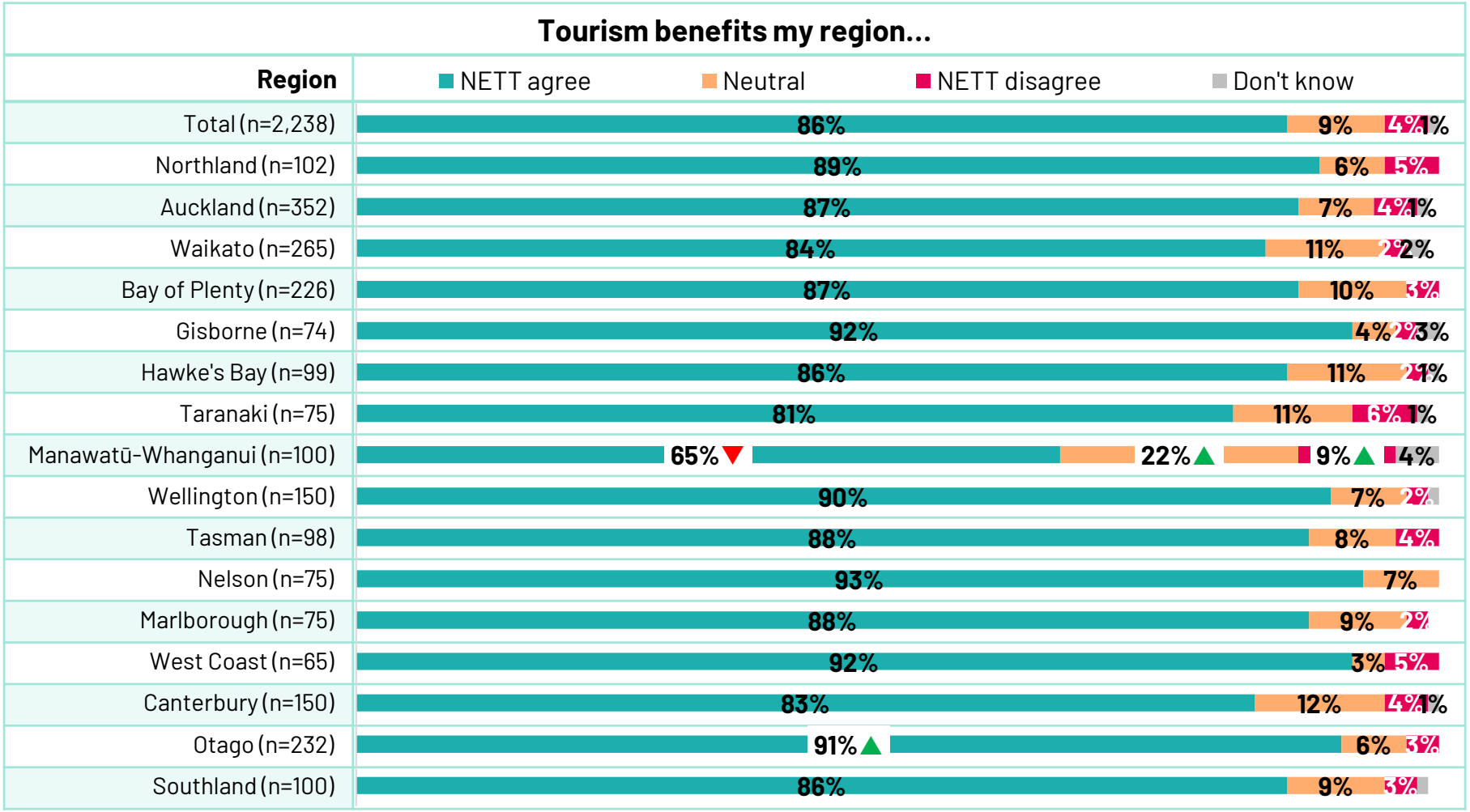
Q11: *Please select the 5 negative impacts that are most concerning to you from the options provided. [multiple choice]*

5. Objective 3 SENTIMENT TOWARDS TOURISM IN DIFFERENT REGIONS



Regional views: Perceived benefits of tourism

Overall 86% agree that tourism benefits their region, *with Manawatū-Whanganui least likely to agree. In Nelson, West Coast, Gisborne & Otago, more than 9 in 10 people agree that tourism is a benefit to their region.*



Those **significantly more likely** to agree that **tourism benefits their region...**

Southeast Asian ***(96%)*** */ Other European* ***(91%)***

Live in Dunedin ***(95%)***

HH income $150k-$200k ***(93%)***

Aged 65+ years ***(91%)***

Those **significantly less likely** to agree that **tourism benefits their region**...

Secondary school ***(80%)***

Aged 18-24 years ***(79%)*** */ 25-34 years* ***(79%)***

▲/▼ // **green/red** *is statistically significantly* ***higher/lower*** *than the total*

Q13: *How much do you agree or disagree with the following statements about tourism in your region?*

International tourism benefits & views on visitor numbers to their region

Region	International tourism benefits my region: Agree	International tourism benefits my region: Disagree	The number of international visitors in my region during the summer is...
			Too many / Right number / Not enough / Don't know
Total (n=2,238)	**85%**	**4%**	8% / 48% / 32% / 11%
Northland (n=102)	88%	6%	5% / 38%▼ / 48%▲ / 12%
Auckland (n=352)	86%	5%	7% / 48% / 34% / 11%
Waikato (n=265)	86%	2%	7% / 50% / 30% / 14%
Bay of Plenty (n=226)	87%	5%	9% / 50% / 30% / 12%
Gisborne (n=74)	83%	4%	6% / 52% / 36% / 6%
Hawke's Bay (n=99)	85%	2%	8% / 55% / 26% / 12%
Taranaki (n=75)	78%	10%▲	6% / 45% / 41% / 9%
Manawatū-Whanganui (n=100)	60%▼	8%	7% / 36%▼ / 46%▲ / 12%
Wellington (n=150)	90%	1%	5% / 47% / 33% / 15%
Tasman (n=98)	88%	3%	25%▲ / 58%▲ / 14%▼ / 2%▼
Nelson (n=75)	93%▲	1%	11% / 47% / 34% / 7%
Marlborough (n=75)	89%	2%	5% / 61%▲ / 27% / 7%
West Coast (n=65)	89%	9%	13% / 55% / 26% / 5%
Canterbury (n=150)	83%	5%	8% / 53% / 29% / 10%
Otago (n=232)	88%	5%	26%▲ / 49% / 18%▼ / 6%▼
Southland (n=100)	85%	5%	8% / 44% / 42% / 6%

▲/▼ *is statistically significantly* ***higher*****/*****lower*** *than the total*

At least a quarter of residents in all regions aside from Tasman & Otago feel they have 'not enough' international visitors *during summer, with this sentiment especially strong in Northland (48%), Manawatū-Whanganui (46%) & Southland (42%).*

Conversely, a quarter of ***residents in Tasman (25%) & Otago (26%) believe there are 'too many' international visitors****.*

Compared to the average, Manawatū-Whanganui & Taranaki residents feel less benefit from international tourism, whereas Nelson residents perceive a more positive impact.

Q13: *How much do you agree or disagree with the following statements about tourism in your region? /* ***Q14:*** *Thinking about international tourism in your region during the summer, do you think there are...*

Ipsos

Regional views: Impact of international tourism on key NZ aspects

	Community & everyday life in my region		The local economy		Natural environment in my region		NZ values & culture	
Region	**Positive impact**	**Negative impact**	**Positive impact**	**Negative impact**	**Positive impact**	**Negative impact**	**Positive impact**	**Negative impact**
Total (n=2,238)	**60%**	**6%**	**83%**	**3%**	**38%**	**17%**	**60%**	**5%**
Northland (n=102)	68%	5%	84%	2%	42%	16%	71%▲	2%
Auckland (n=352)	60%	6%	82%	4%	34%	18%	59%	4%
Waikato (n=265)	61%	6%	83%	3%	40%	15%	61%	6%
Bay of Plenty (n=226)	62%	8%	81%	5%	46%▲	15%	65%	9%▲
Gisborne (n=74)	74%▲	2%	78%	1%	61%▲	5%▼	75%▲	1%
Hawke's Bay (n=99)	54%	5%	77%	2%	39%	9%▼	51%	2%
Taranaki (n=75)	66%	5%	77%	7%	43%	21%	61%	7%
Manawatū-Whanganui (n=100)	53%	3%	74%▼	2%	39%	11%	57%	4%
Wellington (n=150)	62%	4%	89%	2%	37%	12%	59%	5%
Tasman (n=98)	54%	15%▲	89%	1%	50%▲	21%	58%	4%
Nelson (n=75)	62%	7%	95%▲	0%	36%	21%	63%	2%
Marlborough (n=75)	67%	4%	91%	1%	51%▲	7%▼	64%	3%
West Coast (n=65)	62%	15%▲	87%	5%	41%	24%	52%	6%
Canterbury (n=150)	60%	4%	85%	3%	38%	20%	57%	2%
Otago (n=232)	56%	16%▲	86%	4%	38%	25%▲	53%	9%▲
Southland (n=100)	69%	6%	85%	4%	46%	12%	59%	5%

When considering the impact of international tourism, 83% of New Zealanders identified the **boost to the local economy *as the most positive aspect***, *especially in Nelson (95%). However, only 74% in Manawatū-Whanganui felt positively, likely due to fewer international visitors.*

The **natural environment *was perceived as the most negatively impacted attribute*** *(17%), especially in Otago (25%).*

Q18: *Thinking about the impacts of international tourism to your region, what impacts would you say international tourism in your region has on...*

Regional views: Domestic tourism benefits & visitor numbers

	Domestic tourism benefits my region		The number of domestic visitors in my region during the summer is...			
Region	**Agree**	**Disagree**	Too many	Right number	Not enough	Don't know
Total (n=2,238)	**84%**	**3%**	4%	50%	32%	15%
Northland (n=102)	88%	5%	8%	49%	32%	11%
Auckland (n=352)	84%	3%	3%	51%	30%	16%
Waikato (n=265)	83%	3%	5%	49%	33%	14%
Bay of Plenty (n=226)	88%	3%	8% ▲	52%	29%	11%
Gisborne (n=74)	86%	3%	8%	57%	29%	6%
Hawke's Bay (n=99)	80%	4%	6%	52%	30%	12%
Taranaki (n=75)	87%	6%	4%	55%	34%	7%
Manawatū-Whanganui (n=100)	69% ▼	3%	1%	42%	44% ▲	13%
Wellington (n=150)	89%	1%	5%	37% ▼	43% ▲	16%
Tasman (n=98)	92%	1%	14% ▲	62% ▲	16% ▼	8%
Nelson (n=75)	90%	0%	6%	57%	30%	7%
Marlborough (n=75)	85%	4%	1%	53%	33%	12%
West Coast (n=65)	90%	2%	5%	50%	41%	5%
Canterbury (n=150)	83%	3%	3%	60% ▲	25%	13%
Otago (n=232)	89%	1%	4%	48%	38%	10%
Southland (n=100)	85%	4%	2%	44%	46% ▲	8%

Across all regions, domestic visitors seem more desirable than international visitors.

At least 25% of residents in all regions aside from Tasman feel they have 'not enough' domestic visitors *during summer, with this sentiment especially strong in Manawatū-Whanganui (44%), Wellington (43%) & Southland (46%).*

Residents in the ***Tasman (14%) & Bay of Plenty (8%) regions were significantly more likely to state they have 'too many domestic' visitors over the summer.***

Q13: *How much do you agree or disagree with the following statements about tourism in your region? /* ***Q17:*** *Thinking about domestic tourism in your region during the summer, do you think there are...?*

Regional views: Impact of domestic tourism on key NZ aspects

	Community & everyday life in my region		The local economy		Natural environment in my region		NZ values & culture	
Region	**Positive impact**	**Negative impact**	**Positive impact**	**Negative impact**	**Positive impact**	**Negative impact**	**Positive impact**	**Negative impact**
Total (n=2,238)	**65%**	**3%**	**83%**	**2%**	**45%**	**10%**	**64%**	**2%**
Northland (n=102)	68%	3%	89%	1%	44%	15%	65%	1%
Auckland (n=352)	61%	3%	83%	3%	43%	11%	63%	2%
Waikato (n=265)	71%	2%	84%	2%	47%	10%	67%	3%
Bay of Plenty (n=226)	63%	6%▲	82%	3%	47%	12%	67%	2%
Gisborne (n=74)	71%	3%	80%	3%	60%▲	7%	66%	1%
Hawke's Bay (n=99)	60%	3%	79%	1%	44%	6%	51%▼	1%
Taranaki (n=75)	62%	6%	75%	3%	44%	13%	61%	1%
Manawatū-Whanganui (n=100)	60%	3%	70%▼	3%	48%	4%	63%	1%
Wellington (n=150)	70%	3%	88%	1%	47%	6%	66%	2%
Tasman (n=98)	66%	9%▲	88%	2%	57%▲	11%	63%	1%
Nelson (n=75)	69%	4%	93%▲	1%	47%	11%	69%	0%
Marlborough (n=75)	68%	3%	90%	0%	50%	3%	60%	0%
West Coast (n=65)	73%	3%	89%	2%	52%	12%	60%	5%
Canterbury (n=150)	64%	1%	82%	3%	42%	8%	66%	2%
Otago (n=232)	69%	4%	88%	1%	45%	10%	67%	2%
Southland (n=100)	73%	1%	88%	0%	51%	6%	66%	1%

Like with international visitors, when assessing the impact of domestic tourism, ***83% of New Zealanders acknowledged*** **the boost to the local economy** ***as the most positive aspect.*** *Again, this was most prominent in Nelson (93%) & least in Manawatū-Whanganui (70%).*

The **natural environment** ***was viewed as negatively impacted*** *by both domestic & international visitors, but this was notably lower at 10% for domestic visitors compared to 17% for international ones.*

There was also ***an increase in positive impact to*** **community & everyday life** ***(5 % points)*** **& NZ values & culture** ***(4 % points)*** *compared to impact of international visitors.*

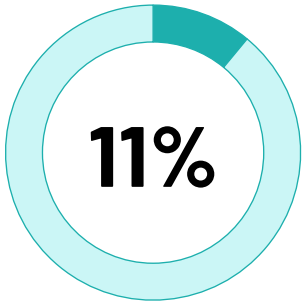
Q19: *Now thinking about domestic tourism, what impacts would you say domestic tourism in your region has on.....*

6. Objective 4 ENGAGEMENT WITH THE NEW ZEALAND TOURISM INDUSTRY



Working in tourism

More than 1 in 10 New Zealanders have been employed in the tourism sector over the past year. This workforce tends to be younger individuals, Māori, or those relatively new to New Zealand or their current region, with a notable concentration in the South Island.



have worked in the tourism sector in the last 12 months*.

88% have not worked in the tourism sector
1% don't know if they have

Those significantly more likely to have worked in the tourism sector...

- *Live in Tasman* ***(35%)*** */ Queenstown* ***(28%)*** ***/*** *West Coast* ***(21%)***
- *Been in New Zealand less than 5 years* ***(22%)***
- *Have loved in their region less than 3 years* ***(19%)***
- *Aged 18–24 years* ***(19%)***
- *Māori* ***(18%)***

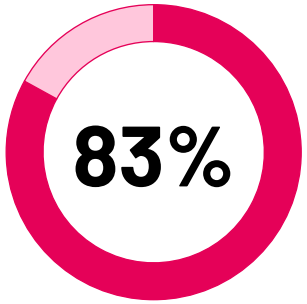
***Note:** This includes working, owning, investing, offering services, or supplying products to tourists or tourism businesses.



Q20: *Have you worked in, or with, the tourism sector (or business related to the tourism sector) in the past 12 months?*
Base: *Total sample (n=2,238)*

Influencing tourism development in their region

Over 80% of New Zealanders have not had the chance to share their views on balancing community needs with visitor demand in tourism development. Additionally, they are unaware of where to express their concerns regionally. However, 27% wish to be more involved in tourism development decisions.

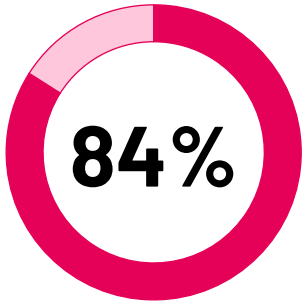


have not had the opportunity to share their views on how tourism development should balance community needs & visitor demand.

10% have had the opportunity
7% don't know

Those significantly more likely to have not had the opportunity to share their views...

- *HH income $150k-$200k* ***(89%)***

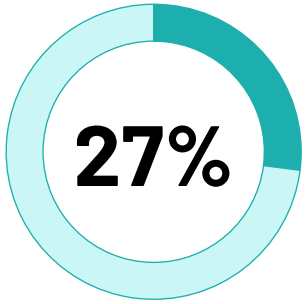


don't know where they can share any concerns they may have about tourism development in their region.

16% do know

Those significantly less likely to know where to share concerns...

- *Aged 55-64 years* ***(11%)*** */ 45-54 years* ***(10%)***



would like to be more involved in tourism development decisions in their region

50% would not like to be involved
23% don't know

Those significantly more likely to want to be involved...

- *Have worked in tourism sector* ***(51%)***
- *Live in Tasman* ***(39%)*** */ Gisborne* ***(38%)***
- *Māori* ***(35%)*** */ Other European* ***(35%)***
- *Have lived in their region 3-6 years* ***(34%)***
- *Aged 35-44 years* ***(33%)***

Q22: *Do you know where you can share any concerns you may have about tourism development in your region? /* ***Q23:*** *Have you had the opportunity to share your views on how tourism development should balance community needs and visitor demand? /* ***Q24:*** *Would you like to be more involved in tourism development decisions in your region?*

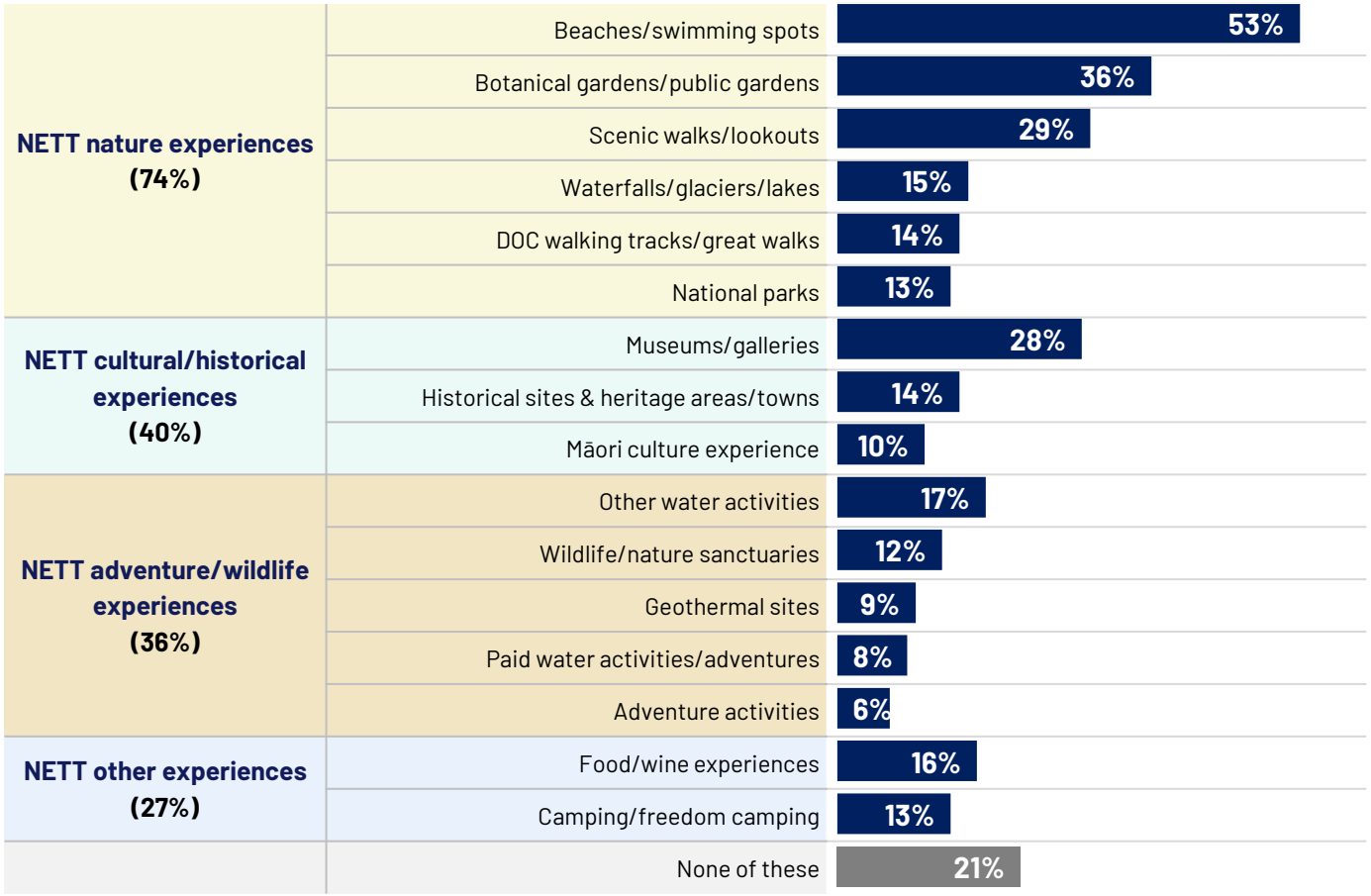
Base: *Total sample (n=2,238)*

green/red is statistically significantly higher/lower than the total

Participating in NZ tourist attractions over summer

During the summer, nature tourism is popular among New Zealanders, with over half visiting beaches *(53%) & others enjoying* public gardens *(36%) &* scenic walks or lookouts *(29%).*

Attractions visited by NZ residents during the 2025/25 summer



Significantly more likely to have had NETT nature experiences...

- *Been in NZ 5–10 years (89%)*
- *HH income $150k–$200k (84%) / over $200k (82%)*
- *Aged 25–34 years (83%) / 35–44 years (80%)*
- *Have lived in region less than 3 years (83%) / 3–6 years (82%)*
- *Have worked in tourism sector (81%)*
- *Māori (79%)*
- *Employed (78%)*

Significantly more likely to have had NETT cultural/historical experiences...

- *Have worked in tourism sector (60%)*
- *Been in NZ less than 5 years (58%)*
- *Have lived in region less than 3 years (55%)*
- *Māori (54%) / Indian (54%) / NETT Pacific Peoples (54%)*
- *Aged 35–44 years (48%)*

Significantly more likely to have had NETT adventure/wildlife experiences...

- *Have worked in tourism sector (59%)*
- *Have lived in region less than 3 years (55%)*
- *Been in NZ less than 5 years (54%)*
- *Indian (51%) / Māori (49%)*
- *Aged 18–24 years (50%) / 35–44 years (46%) / 25–34 years (42%)*

Significantly more likely to have had food/wine experiences...

- *Have worked in tourism sector (29%)*
- *Have lived in region less than 3 years (25%) / 3–6 years (21%)*
- *HH income over $200k (25%)*
- *Other European (23%) / Māori (20%)*
- *Aged 25–34 years (22%)*

Significantly more likely to have had camping experiences...

- *Have worked in tourism sector (24%)*
- *Māori (22%)*
- *Been in NZ less than 5 years (21%)*
- *Female (16%)*

green/red is statistically significantly higher/lower than the total

See regional differences on next page

***Attraction groupings:** NETT % attraction groupings are the people who selected at least one attraction within the group, i.e. 74% of participants selected at least one attraction associated with the 'NETT nature experiences' grouping.*

***Q21:** Over the last summer between December 2025 and February 2026, have you personally visited or participated in any of the following types of tourist attractions in New Zealand? [multiple choice]*

***Base:** Total sample (n=2,238)*

Participating in NZ tourist attractions over summer – by region

Engagement in different activities varies regionally based on local offerings.

Activities over summer	Total (n=2,238)	Northland (n=102)	Auckland (n=352)	Waikato (n=265)	Bay of Plenty (n=226)	Gisborne (n=74)	Hawke's Bay (n=99)	Taranaki (n=75)	Manawatū-Whanganui (n=100)	Wellington (n=150)	Tasman (n=98)	Nelson (n=75)	Marlborough (n=75)	West Coast (n=65)	Canterbury (n=150)	Otago (n=232)	Southland (n=100)
Beaches/swimming spots	**53%**	62%	57%	49%	53%	49%	40%▼	57%	56%	57%	48%	65%	46%	54%	48%	46%▼	34%▼
Botanical gardens/public gardens	**36%**	20%▼	32%	28%▼	24%▼	33%	30%	29%	42%	46%▲	27%	42%	24%▼	24%	50%▲	46%▲	37%
Scenic walks/lookouts	**29%**	23%	31%	23%	24%	17%▼	17%▼	30%	35%	38%▲	31%	32%	23%	32%	26%	29%	23%
Waterfalls/glaciers/lakes	**15%**	16%	16%	16%	16%	15%	9%	20%	9%	12%	14%	12%	11%	25%▲	15%	18%	11%
DOC walking tracks/great walks	**14%**	11%	12%	13%	15%	4%▼	12%	15%	11%	16%	30%▲	18%	14%	17%	16%	15%	15%
National parks	**13%**	3%▼	13%	8%▼	12%	6%	10%	21%▲	19%	9%	27%▲	26%▲	15%	17%	14%	17%	18%
Museums/galleries	**28%**	19%▼	32%	17%▼	16%▼	13%▼	17%▼	31%	37%	47%▲	31%	17%▼	14%▼	19%	23%	31%	27%
Historical sites & heritage areas/towns	**14%**	28%▲	14%	11%	16%	7%	6%▼	8%	14%	13%	24%▲	13%	12%	10%	13%	16%	14%
Māori culture experience	**10%**	10%	8%	14%	21%▲	22%▲	11%	12%	20%▲	8%	11%	8%	8%	8%	6%	8%	8%
Other water activities	**17%**	22%	15%	20%	24%▲	20%	16%	21%	11%	13%	27%▲	13%	33%▲	12%	16%	14%	15%
Wildlife/nature sanctuaries	**12%**	4%▼	10%	8%	9%	7%	4%▼	12%	11%	20%▲	19%▲	16%	9%	10%	17%	15%	13%
Geothermal sites	**9%**	8%	8%	14%▲	14%▲	8%	8%	4%	8%	9%	10%	10%	7%	9%	13%	4%▼	3%▼
Paid water activities/adventures	**8%**	10%	8%	9%	9%	8%	14%▲	8%	6%	5%	17%▲	3%	7%	5%	8%	8%	7%
Adventure activities	**6%**	7%	7%	5%	10%▲	7%	10%	10%	7%	4%	6%	3%	2%	2%	5%	4%	3%
Food/wine experiences	**16%**	10%	18%	12%	15%	12%	22%	13%	15%	21%	20%	20%	31%▲	4%▼	12%	15%	13%
Camping/freedom camping	**13%**	11%	10%	12%	16%	14%	15%	10%	17%	16%	3%▼	13%	25%▲	20%	15%	15%	19%
None of these	**21%**	30%▲	19%	23%	24%	13%	29%	17%	14%	19%	16%	18%	15%	25%	24%	21%	31%▲

▼/▲ is statistically significantly **higher/lower** than the total

Q21: *Over the last summer between December 2025 and February 2026, have you personally visited or participated in any of the following types of tourist attractions in New Zealand? [multiple choice]*

Base: *Total sample (n=2,238)*

Attraction groupings:

Nature experiences	Adventure/wildlife experiences
Cultural/historical experiences	Other experiences

7. DESTINATIONS OF INTEREST DEEP-DIVE

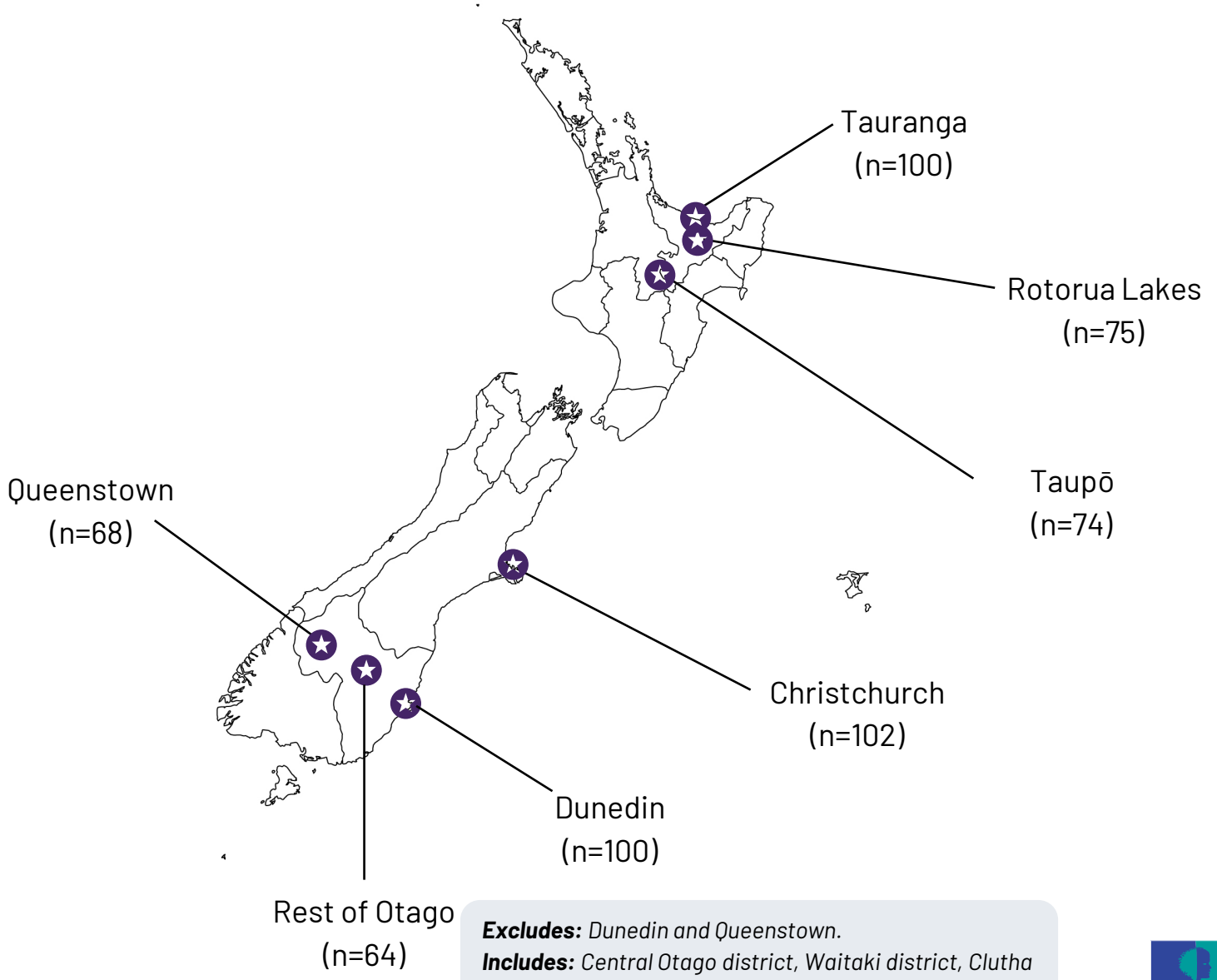


Destinations of interest

Seven DOIs were chosen for individual analysis of survey responses.

These areas were selected due to their popularity as NZ tourism destinations.

This chapter presents the views of New Zealanders who live in these DOIs, but it is important to note that they were asked questions about how tourism impacts on their wider region (e.g. Bay of Plenty) not just on their specific DOI (e.g. Rotorua).



Excludes: *Dunedin and Queenstown.*
Includes: *Central Otago district, Waitaki district, Clutha district, and any other area in Otago.*

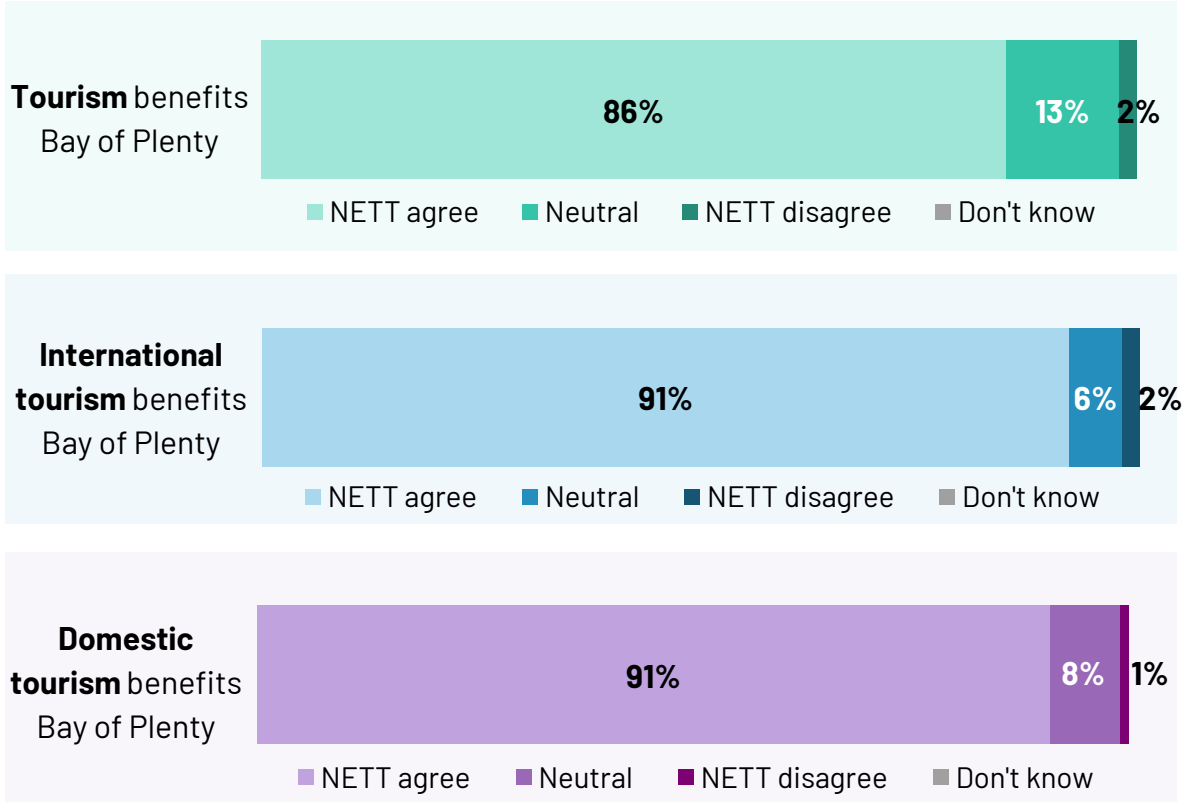
TAURANGA



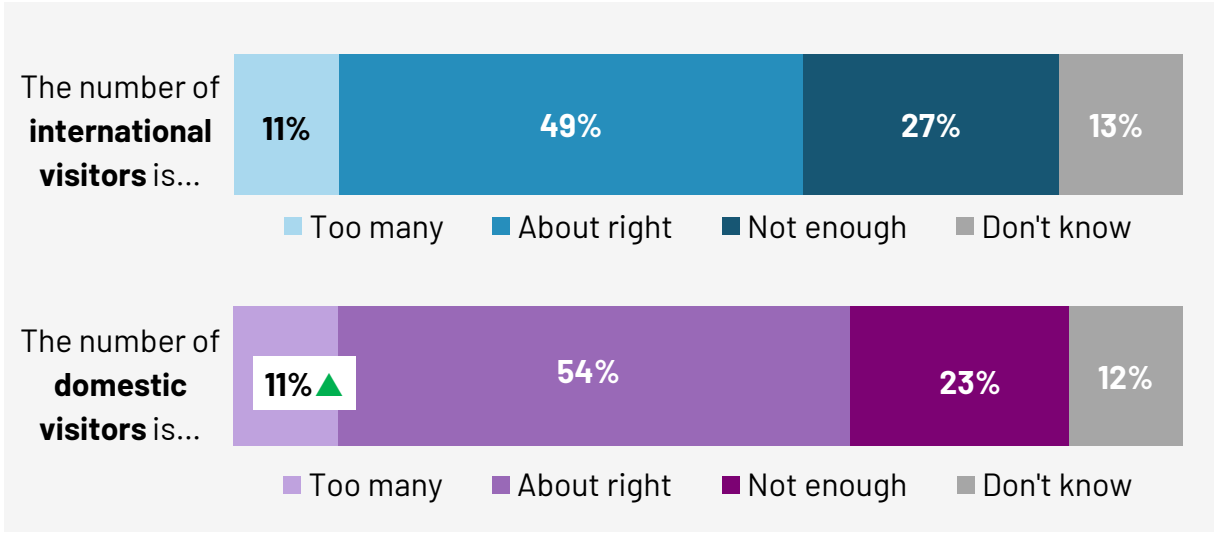
Tauranga residents: Tourism benefits & visitor numbers

Among Tauranga residents, 86% believe that tourism benefits the Bay of Plenty, aligning closely with the 88% from Rotorua Lakes. Approximately half feel the region receives 'about the right number' of international (49%) & domestic (54%) visitors during summer. However, a quarter feel there are 'not enough' international (27%) & domestic (23%) visitors. Tauranga residents have a smaller appetite for more visitors in the Bay of Plenty region than Rotorua Lakes ones.

Perceived benefit of tourism to Bay of Plenty



Perceived number of visitors in Bay of Plenty during the summer



▼/▲ is statistically significantly higher/lower than the total

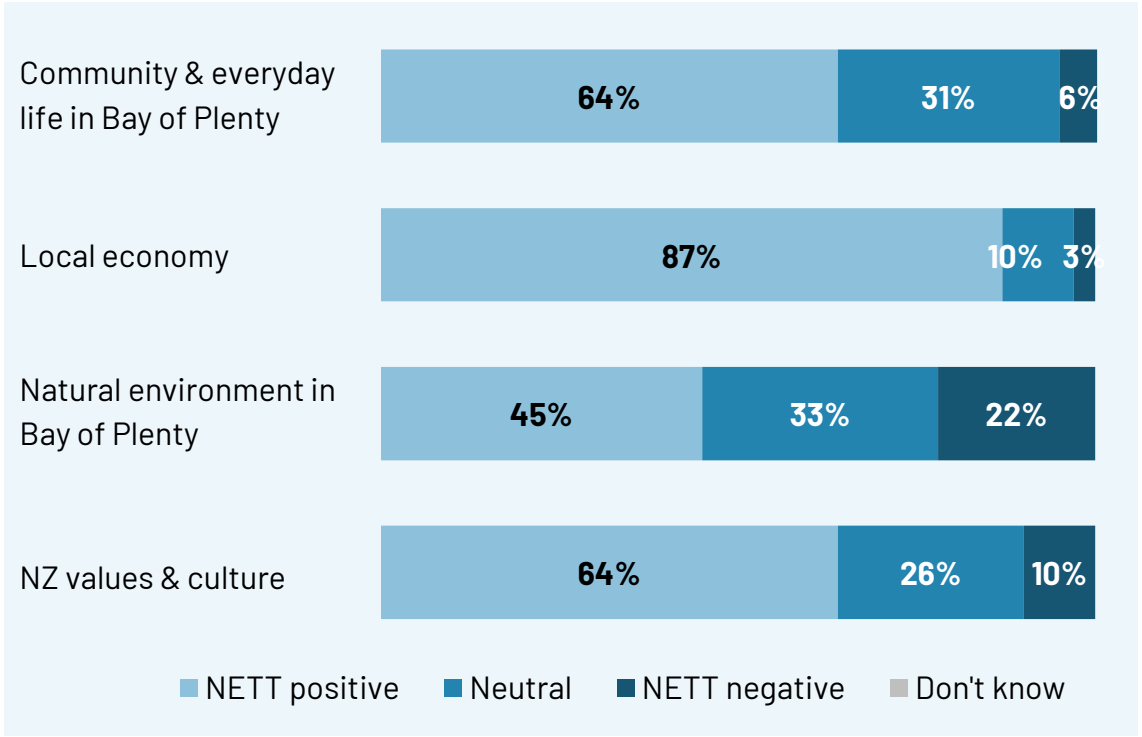
Q13: *How much do you agree or disagree with the following statements about tourism in Bay of Plenty? /* ***Q14/Q17:*** *Thinking about tourism in Bay of Plenty during the summer, do you think there are...*

Base: *Tauranga residents (n=100)*

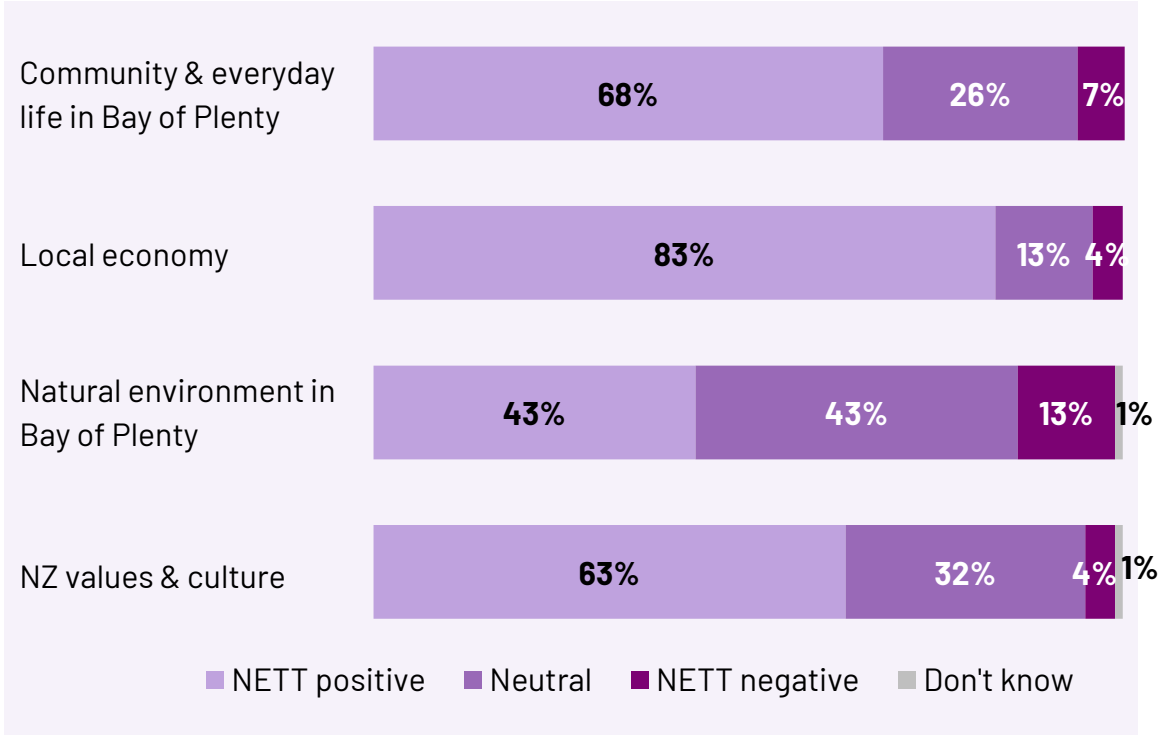
Tauranga residents: Impact of tourism on key regional aspects

Tauranga residents, like those in other regions, highlight the boost to the local economy *as the most positive impact of both international (87%) & domestic (83%) tourism. A majority (63%-68%) also perceive tourism as beneficial for the* community, everyday life & NZ values & culture. *However, tourism's positive impact on the* natural environment *is significantly lower, with only 43%-45% agreement. Although not statistically significant, more Tauranga residents view international tourism (22%) as negatively impacting the* natural environment *compared to domestic tourism (13%).*

Impact of international tourism in Bay of Plenty on...



Impact of domestic tourism in Bay of Plenty on...



Q18: *Thinking about the impacts of international tourism to Bay of Plenty, what impacts would you say international tourism in Bay of Plenty has on... /* ***Q19:*** *Now thinking about domestic tourism, what impacts would you say domestic tourism in Bay of Plenty has on...*

Base: *Tauranga residents (n=100)*

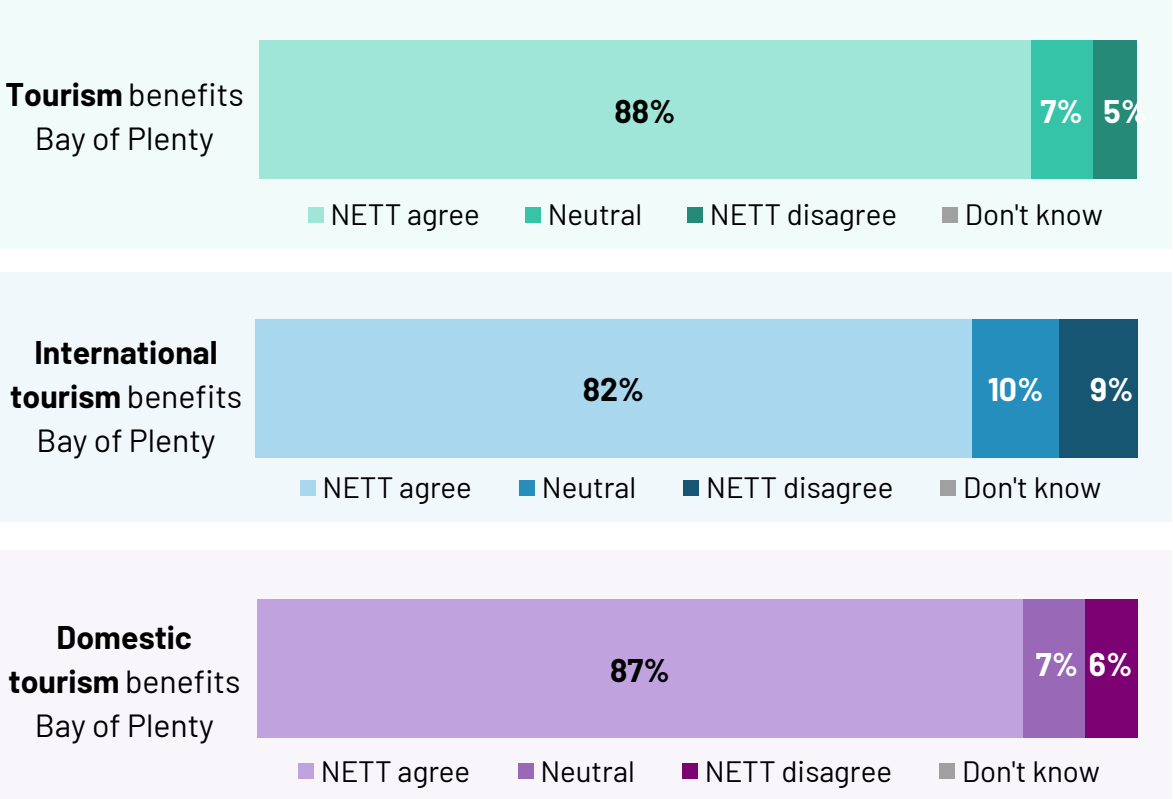
ROTORUA LAKES



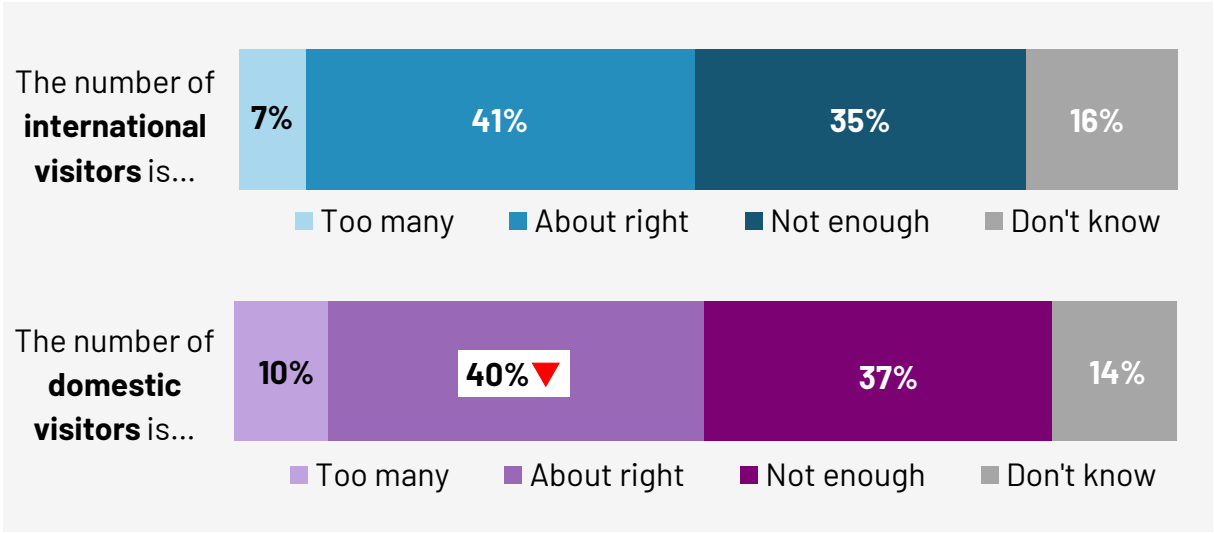
Rotorua Lakes residents: Tourism benefits & visitor numbers

Among Rotorua Lakes residents, 88% believe tourism benefits the Bay of Plenty, aligning closely with the 86% from Tauranga. About 40% feel the region receives 'the right number' of international (41%) & domestic (40%) visitors during summer, while roughly one third believe there are 'not enough' international (35%) & domestic (37%) tourists. Rotorua Lakes' residents have a greater appetite for more tourists in the Bay of Plenty region compared to those from Tauranga.

Perceived benefit of tourism to Bay of Plenty



Perceived number of visitors in Bay of Plenty during the summer



▼/▲ is statistically significantly higher/lower than the total

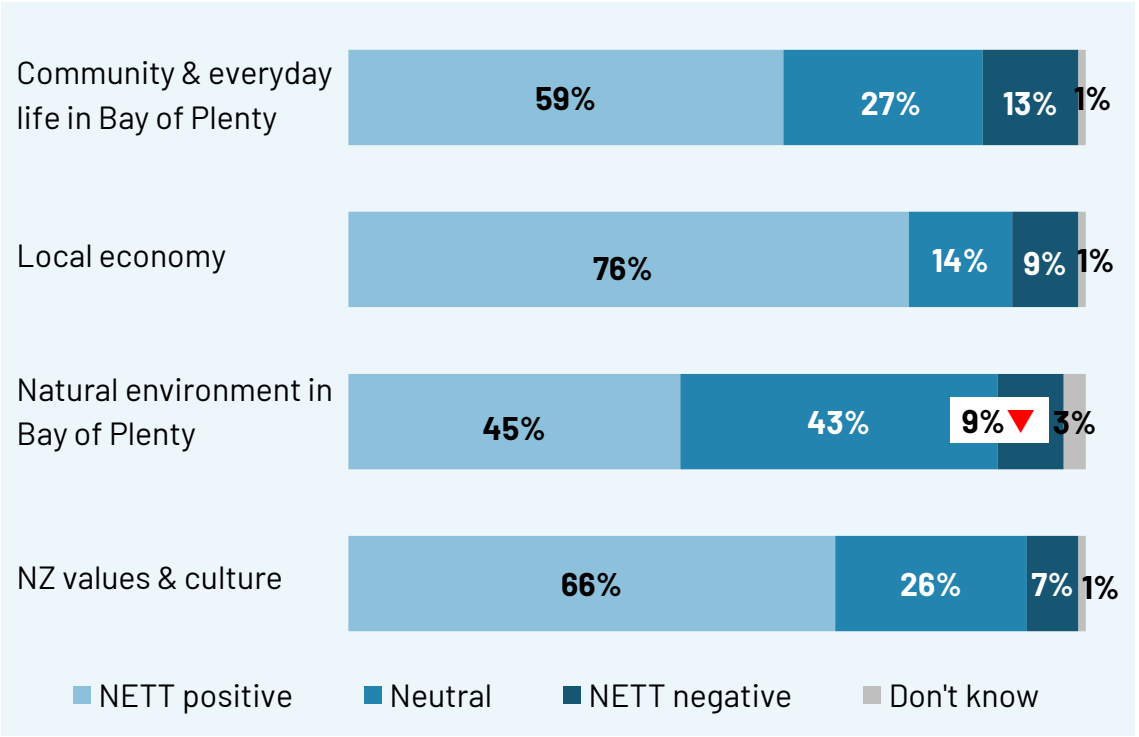
Q13: *How much do you agree or disagree with the following statements about tourism in Bay of Plenty?* / ***Q14/Q17:*** *Thinking about tourism in Bay of Plenty during the summer, do you think there are...*

Base: *Rotorua Lakes residents (n=75)*

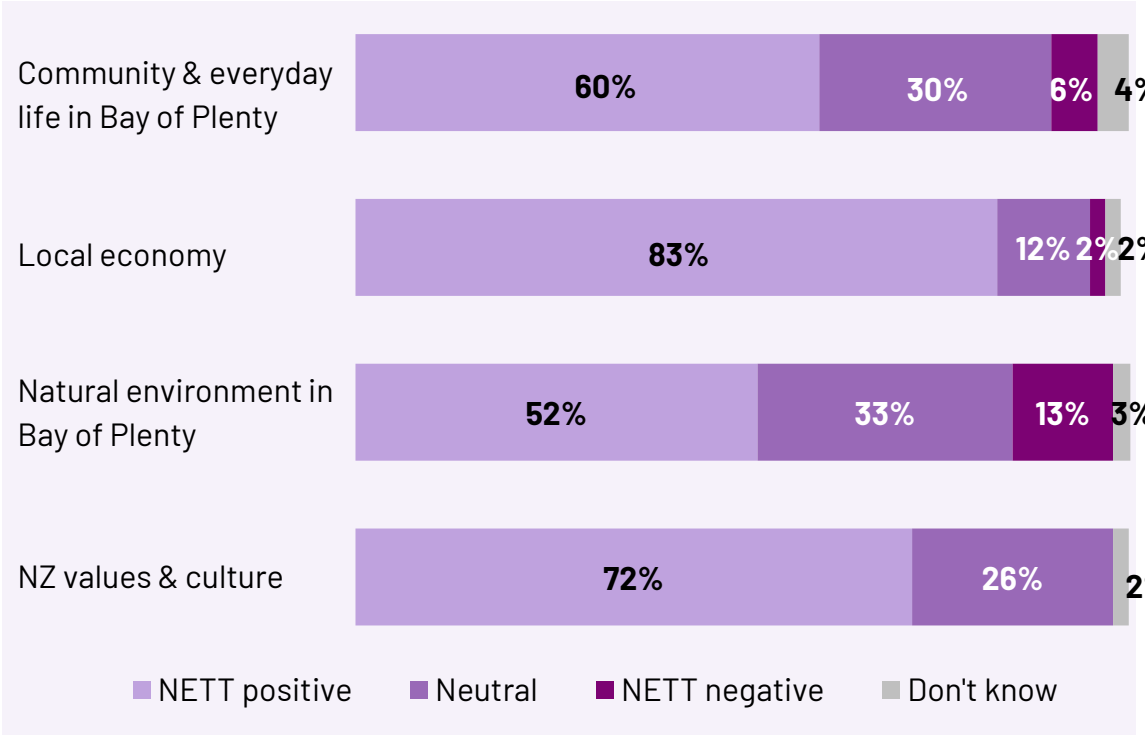
Rotorua Lakes residents: Impact of tourism on key regional aspects

Rotorua Lakes residents, like those in other regions, highlight the boost to the local economy *as the most positive impact of both international (76%) & domestic (83%) tourism. A majority (59%–72%) also perceive tourism as beneficial for the* community, everyday life & NZ values & culture. *Perceptions of tourism's* environmental *impact remain least positive (45%–52%).*

Impact of international tourism in Bay of Plenty on key aspects



Impact of domestic tourism in Bay of Plenty on key aspects



▼/▲ is statistically significantly **higher**/**lower** than the total

Q18: *Thinking about the impacts of international tourism to Bay of Plenty, what impacts would you say international tourism in Bay of Plenty has on... /* ***Q19:*** *Now thinking about domestic tourism, what impacts would you say domestic tourism in Bay of Plenty has on...*

Base: *Rotorua Lakes residents (n=75)*

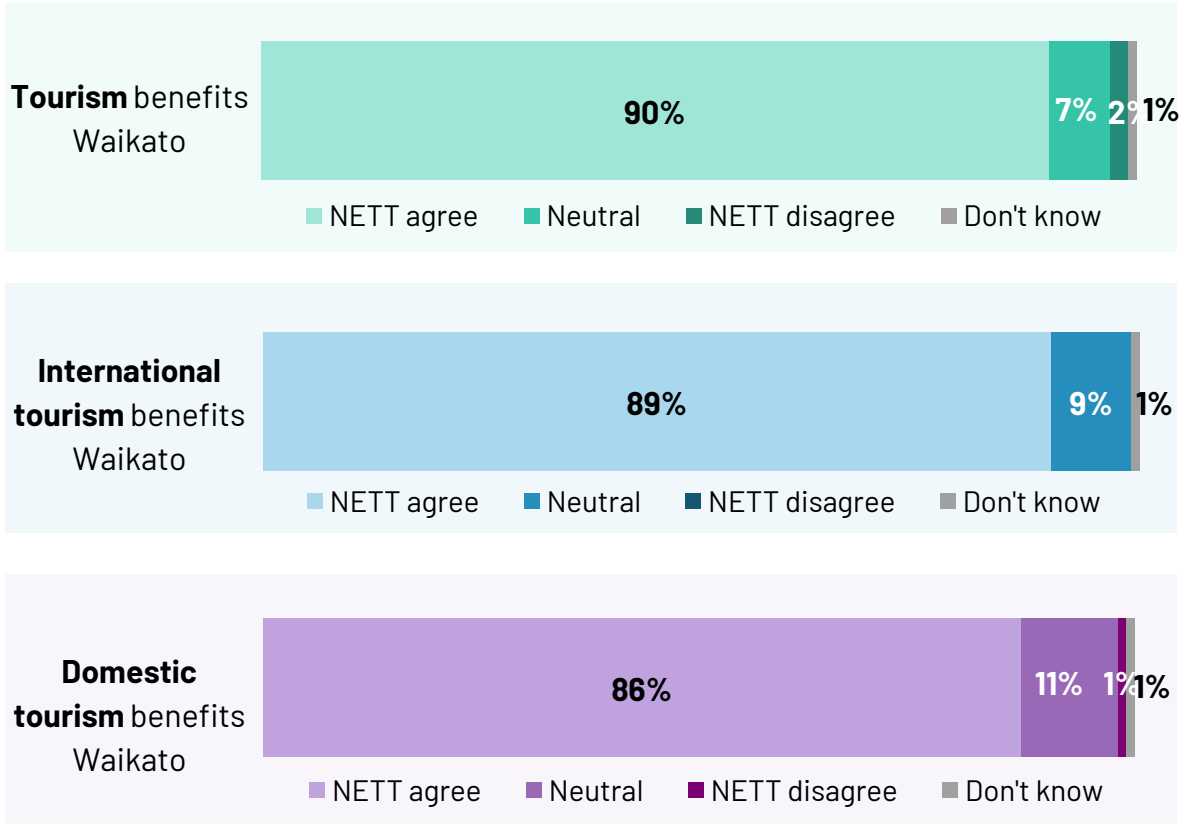
TAUPŌ



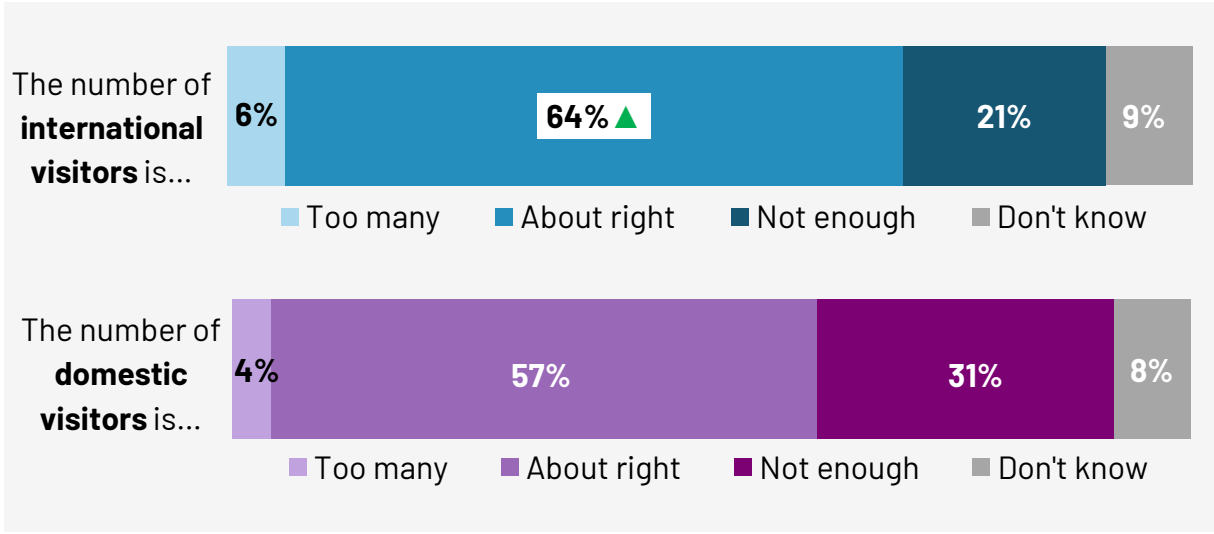
Taupō residents: Tourism benefits & visitor numbers

Among Taupō residents, 90% believe that tourism benefits the Waikato. More than half feel the region receives the 'right number' of international (64%) & domestic (57%) visitors during summer. However, 21% & 31 respectively believe there are 'not enough' international & domestic visitors.

Perceived benefit of tourism to Waikato



Perceived number of visitors in Waikato during the summer



▼/▲ is statistically significantly **higher**/**lower** than the total

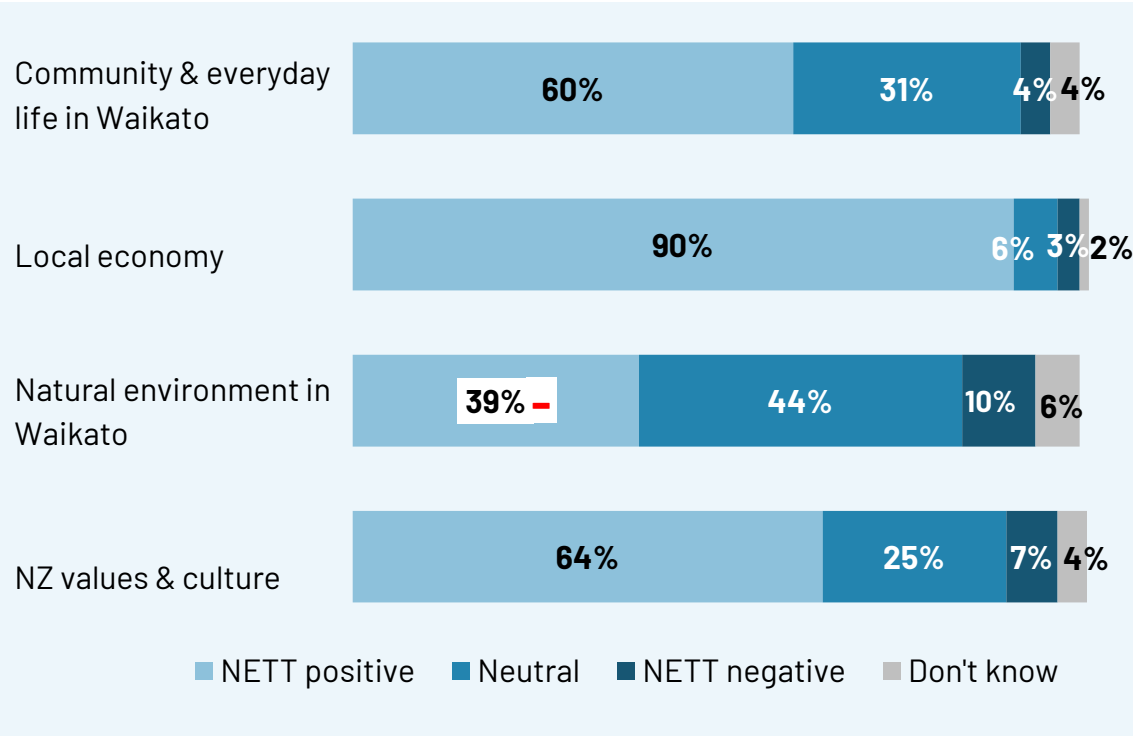
Q13: *How much do you agree or disagree with the following statements about tourism in Waikato?* / ***Q14/Q17:*** *Thinking about tourism in Waikato during the summer, do you think there are...*

Base: *Taupō residents (n=74)*

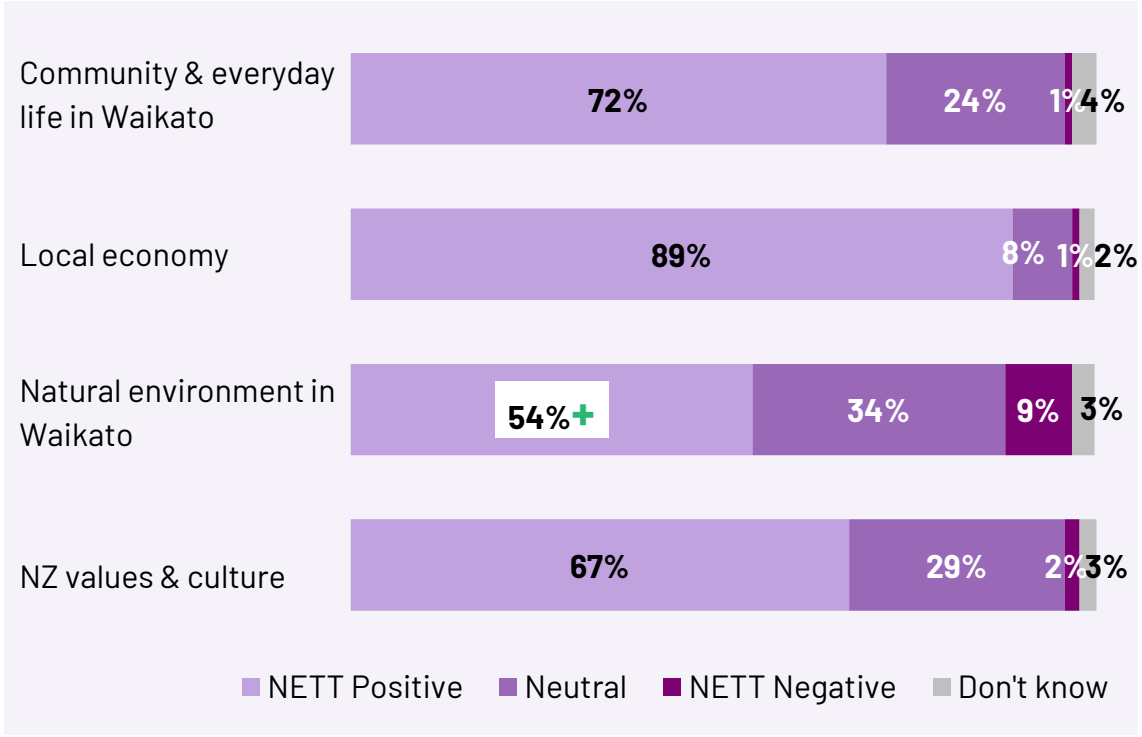
Taupō residents: Impact of tourism on key regional aspects

Taupō residents, similar to other regions, recognise the positive impact of both international (90%) & domestic (89%) tourism on the local economy. *A substantial majority (60%–72%) also view tourism as beneficial for the* community, daily life & NZ values & culture. *Although the overall perception of tourism's* environmental *impact remains least positive, Taupō residents are statistically significantly more inclined to see domestic tourism as having a positive* environmental *effect (54%) as opposed to international tourism (39%).*

Impact of international tourism in Waikato on...



Impact of domestic tourism in Waikato on...



+/- is statistically significantly higher/lower when comparing domestic tourism to international tourism

Q18: *Thinking about the impacts of international tourism to Waikato, what impacts would you say international tourism in Waikato has on... /* ***Q19:*** *Now thinking about domestic tourism, what impacts would you say domestic tourism in Waikato has on...*

Base: *Taupō residents (n=74)*

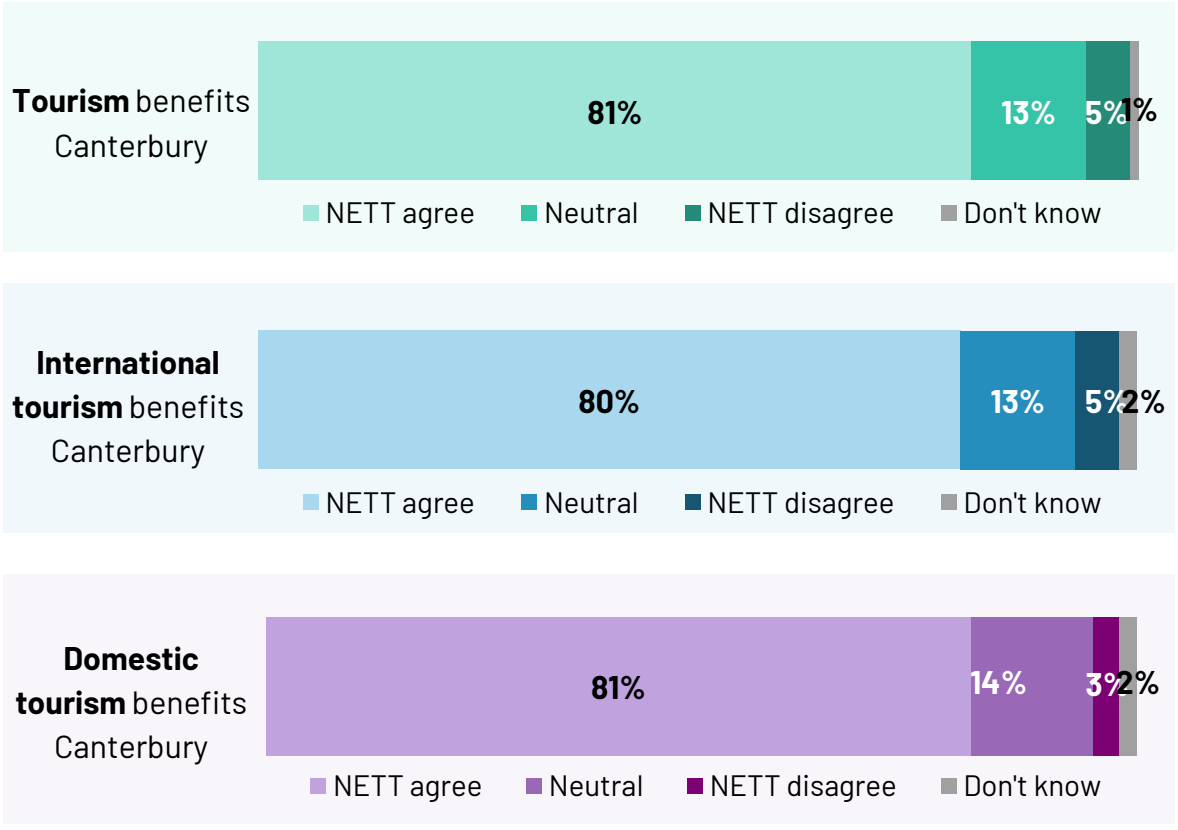
CHRISTCHURCH



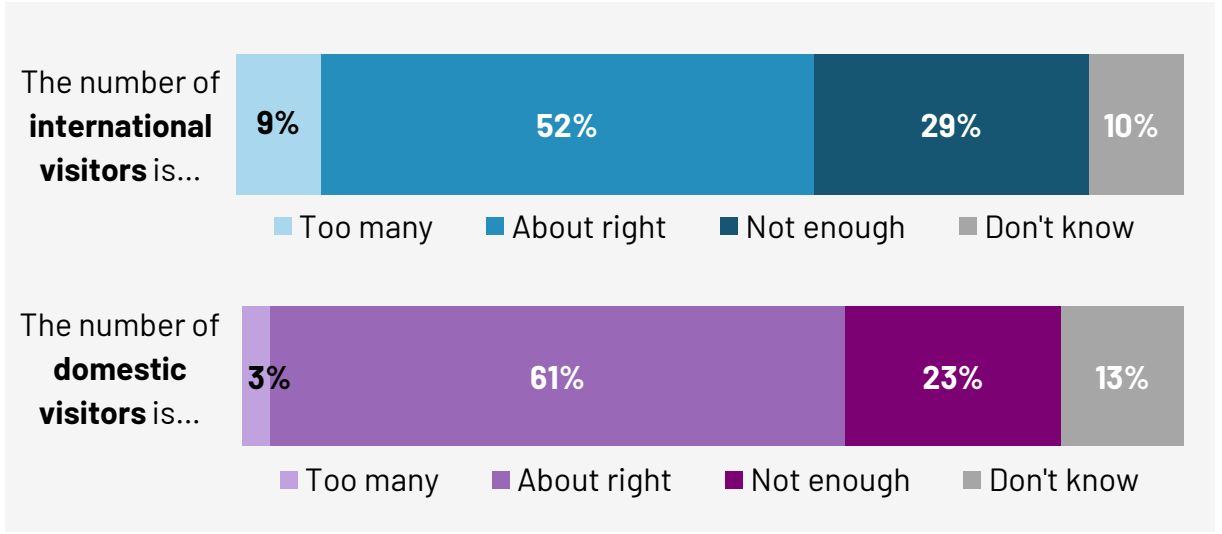
Christchurch residents: Tourism benefits & visitor numbers

Among Christchurch residents, 81% believe that tourism benefits Canterbury. More than half feel the region receives the 'right number' of international (52%) & domestic (61%) visitors during summer. However, 29% & 23% respectively believe there are 'not enough' international & domestic visitors.

Perceived benefit of tourism to Canterbury



Perceived number of visitors in Canterbury during the summer

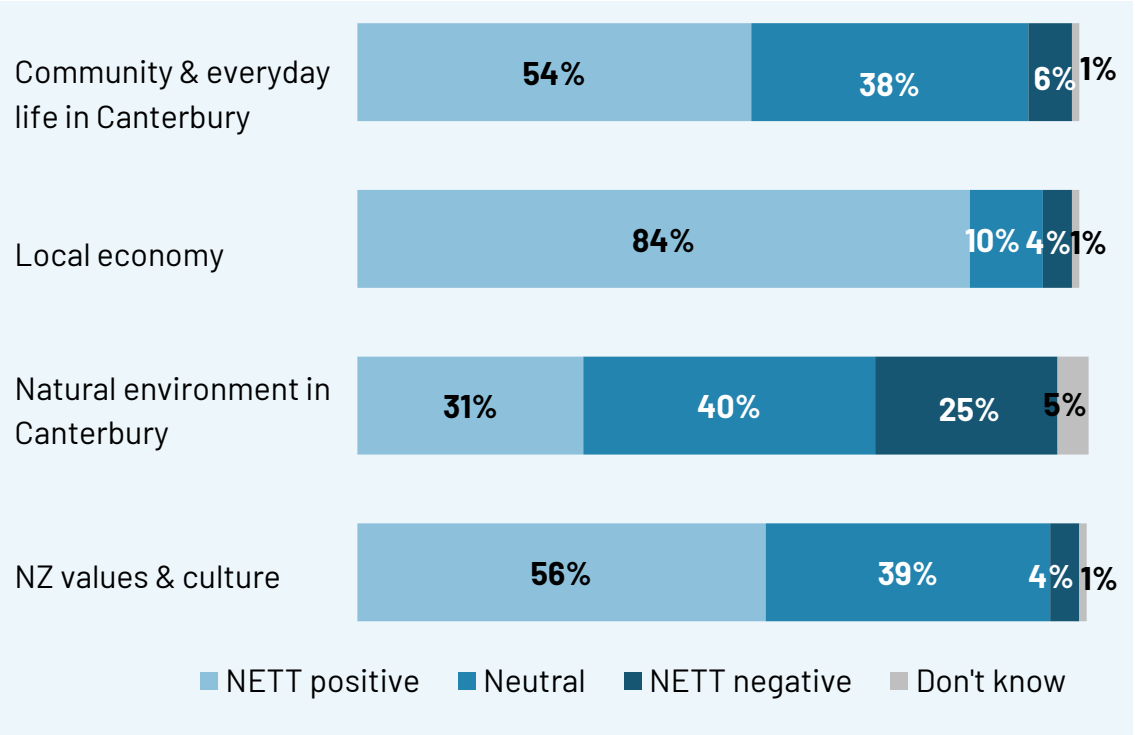


Q13: *How much do you agree or disagree with the following statements about tourism in Canterbury? /* ***Q14/Q17:*** *Thinking about tourism in Canterbury during the summer, do you think there are...*
Base: *Christchurch residents (n=102)*

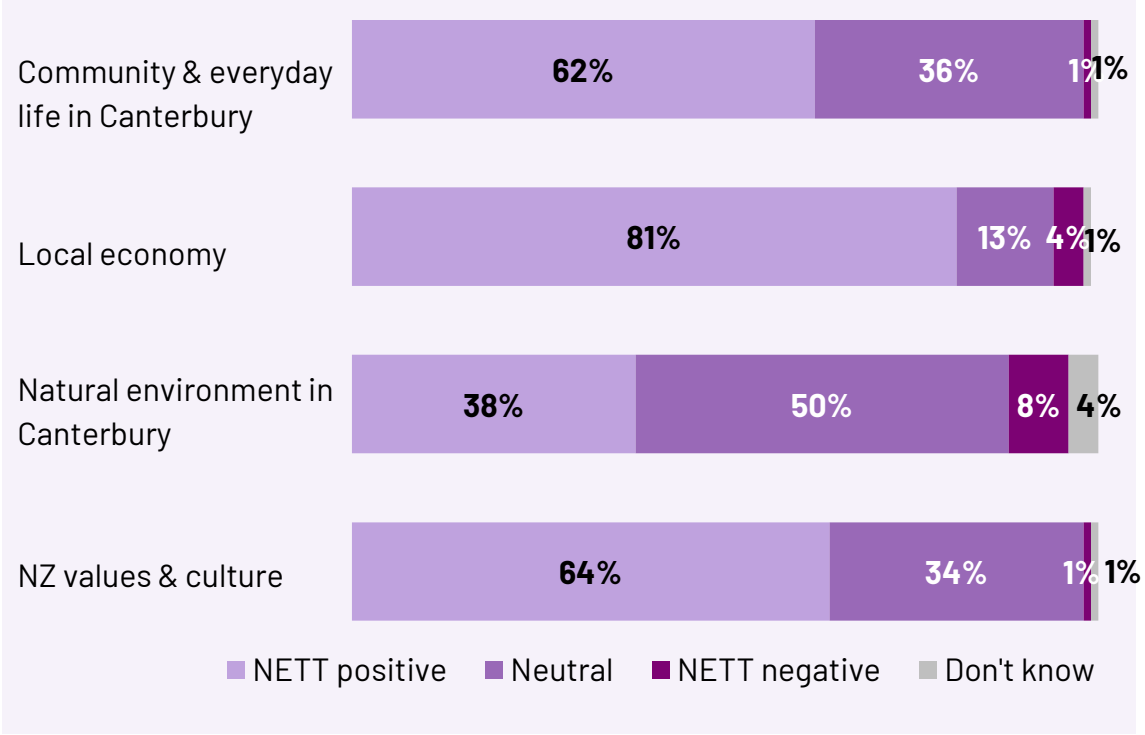
Christchurch residents: Impact of tourism on key regional aspects

Christchurch residents, akin to other regions, identify the boost to the local economy *as the most positive impact from both international (84%) & domestic (81%) tourism. A majority (54%–64%) see tourism positively affecting the* community, daily life & NZ values & culture, *while the* environmental *impact of tourism is viewed less favourably (31%–38%). Although not statistically significant, Christchurch residents prefer domestic visitors' influence on* community, daily life & NZ values, *perceiving them as having a less negative effect on Canterbury's environment.*

Impact of international tourism in Canterbury on key aspects



Impact of domestic tourism in Canterbury on key aspects



Q18: *Thinking about the impacts of international tourism to Canterbury, what impacts would you say international tourism in Canterbury has on... /* ***Q19:*** *Now thinking about domestic tourism, what impacts would you say domestic tourism in Canterbury has on...*

Base: *Christchurch residents (n=102)*

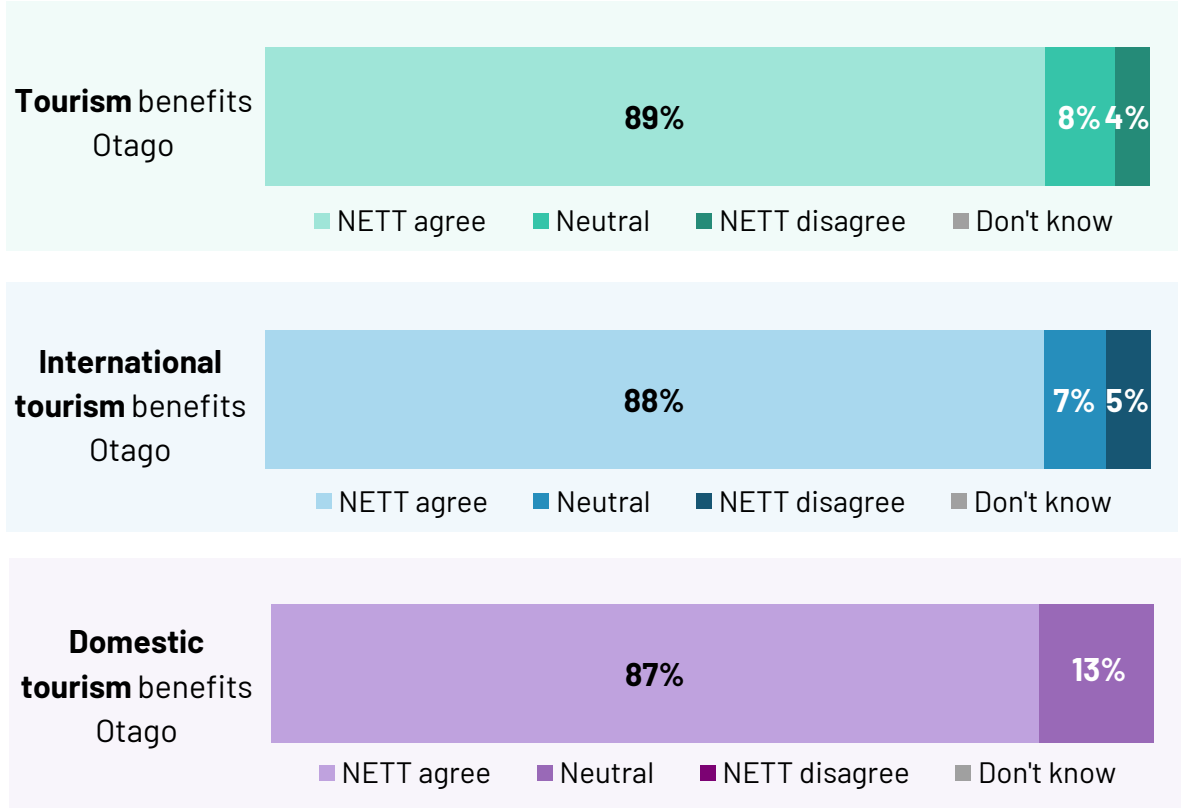
QUEENSTOWN



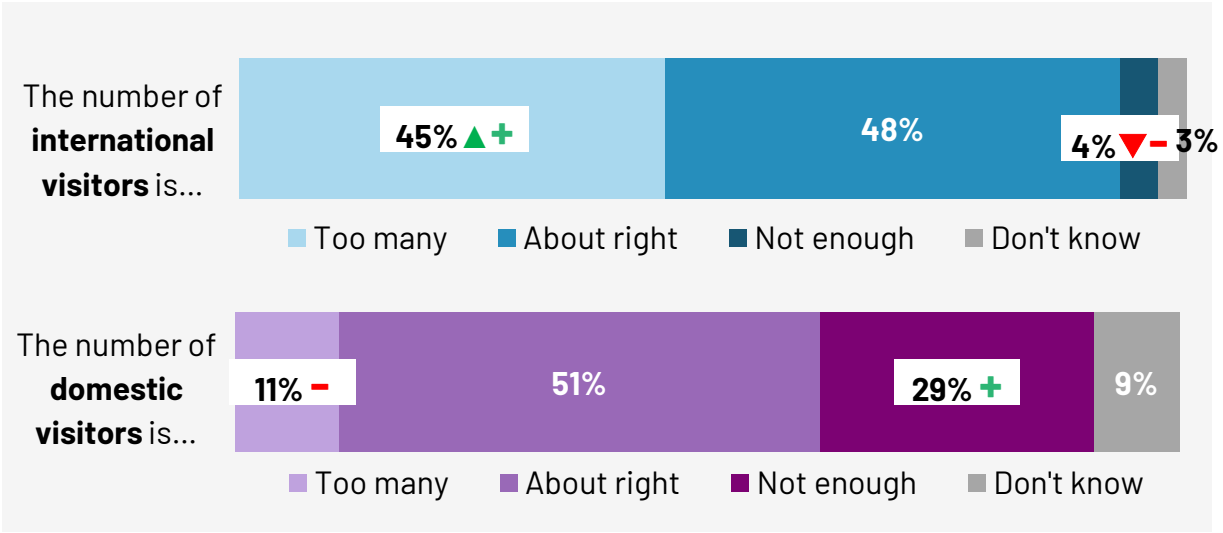
Queenstown residents: Tourism benefits & visitor numbers

Among Queenstown residents, 89% believe tourism benefits Otago. About half feel the region receives the 'right number' of international (48%) & domestic (51%) visitors during summer. However, unlike other regions, 45% of Queenstown residents feel there are 'too many' international visitors vs 11% for 'too many' domestic visitors. More than a quarter (29%) believe there are 'not enough' domestic visitors during summer.

Perceived benefit of tourism to Otago



Perceived number of visitors in Otago during the summer



Q13: *How much do you agree or disagree with the following statements about tourism in Otago?* / ***Q14/Q17:*** *Thinking about tourism in Otago during the summer, do you think there are...*

Base: *Queenstown residents (n=68)*

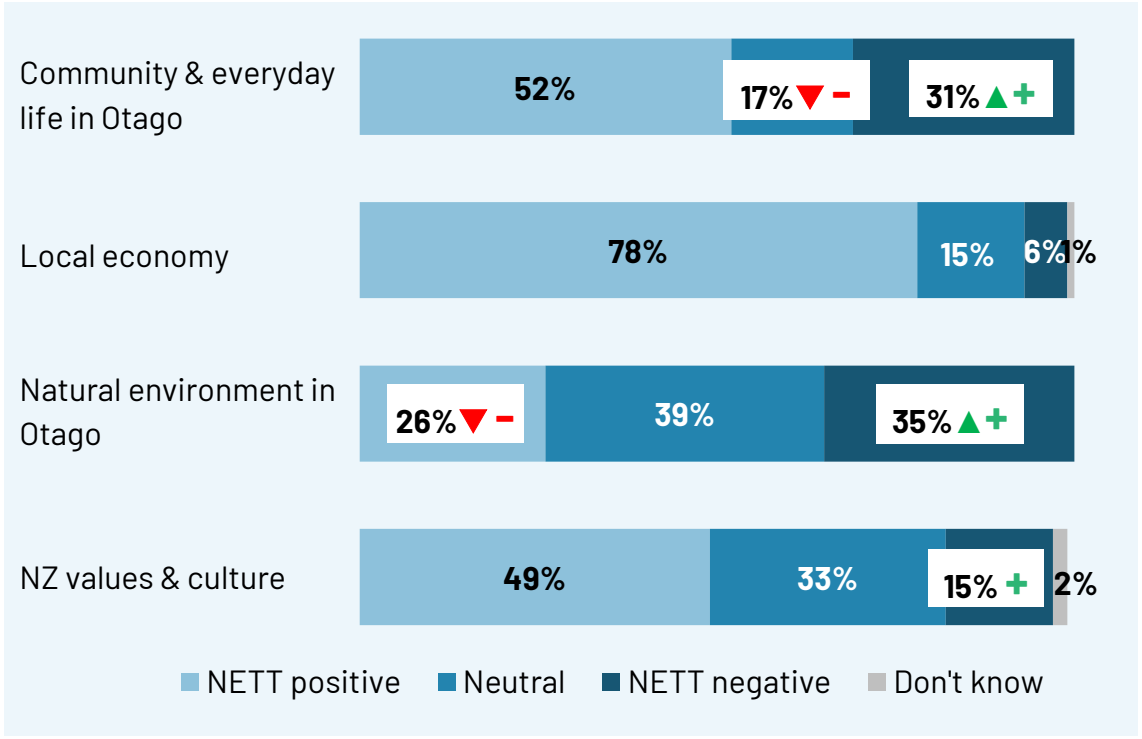
▼/▲ is statistically significantly ***higher/lower*** than the total

+/- is statistically significantly ***higher/lower*** when comparing domestic tourism to international tourism

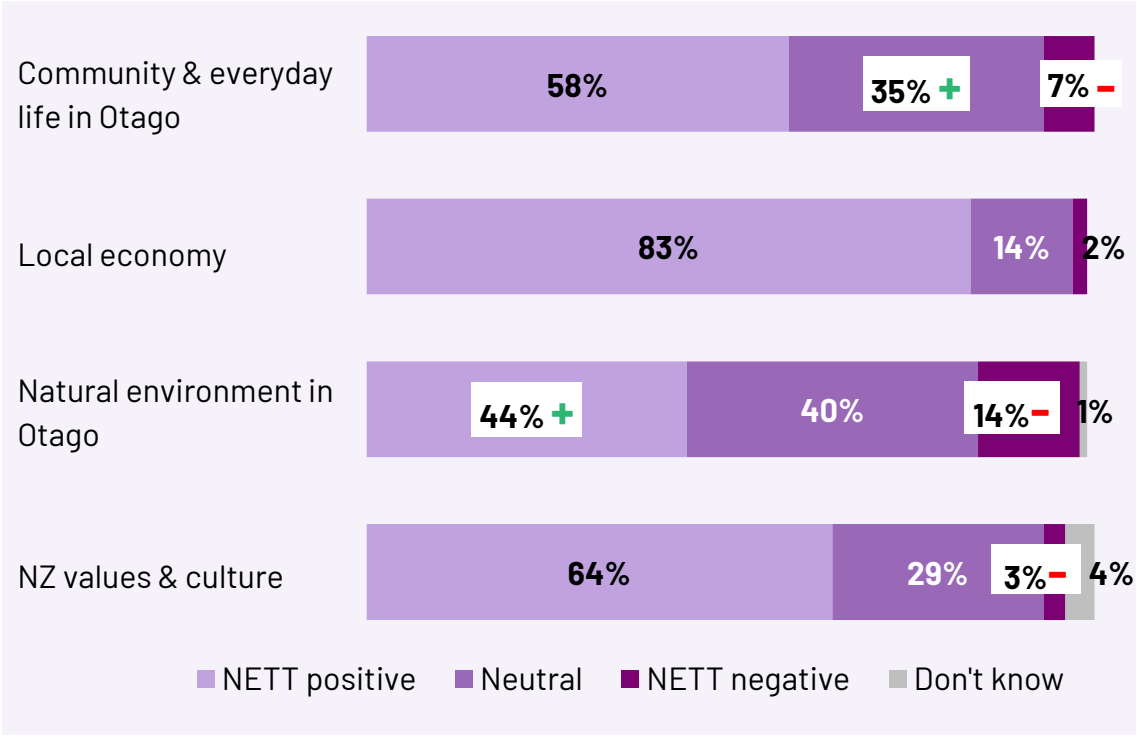
Queenstown residents: Impact of tourism on key regional aspects

Queenstown residents recognise the boost to the local economy *as the top benefit of both international (78%) & domestic (83%) tourism. Over half view international tourism as positively impacting* community & everyday life *(52%), yet 31% see a negative impact vs just 7% for domestic tourism. Moreover, 64% believe domestic tourism enhances* NZ values & culture, *while only 49% state the same for international tourism, which is also perceived more negatively than domestic (15% vs 3%). The* natural environment *impact is viewed negatively, with international tourism having more negative (35%) than positive (26%) effects, whereas domestic tourism is seen more favourably, with 44% positive & 14% negative impact.*

Impact of international tourism in Otago on key aspects



Impact of domestic tourism in Otago on key aspects



Q18: *Thinking about the impacts of international tourism to Otago, what impacts would you say international tourism in Otago has on... /* ***Q19:*** *Now thinking about domestic tourism what impacts would you say domestic tourism in Otago has on...*

Base: *Queenstown residents (n=68)*

▼ / ▲ *is statistically significantly* ***higher/lower*** *than the total*

+/- *is statistically significantly* ***higher/lower*** *when comparing domestic tourism to international tourism*

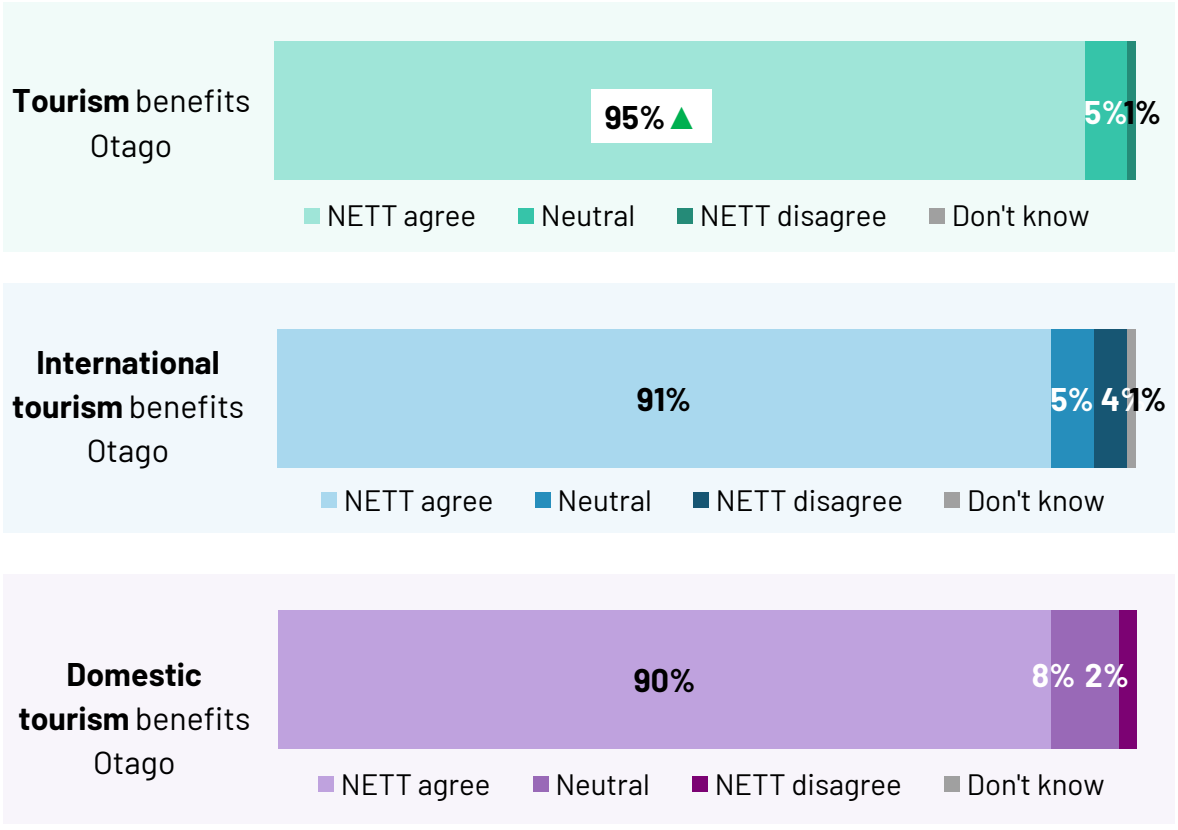
DUNEDIN



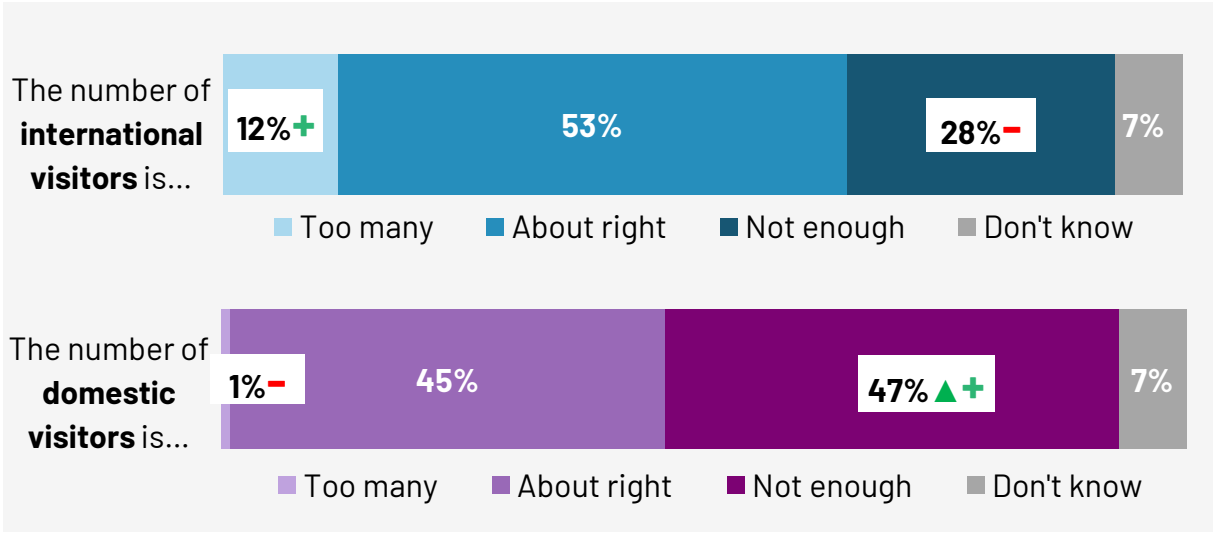
Dunedin residents: Tourism benefits & visitor numbers

Among Dunedin residents, 95% believe tourism benefits Otago. About half feel the region receives the 'right number' of international (53%) & domestic (45%) visitors in summer. Similar to their Queenstown neighbours, Dunedin residents feel there are 'too' many international visitors (12%), while only 1% think there are 'too many' domestic visitors. Nearly half (47%) believed there were 'not enough' domestic visitors to Otago during the summer period.

Perceived benefit of tourism to Otago



Perceived number of visitors in Otago during the summer



Q13: *How much do you agree or disagree with the following statements about tourism in Otago? /* ***Q14/Q17:*** *Thinking about tourism in Otago during the summer, do you think there are...*

Base: *Dunedin residents (n=100)*

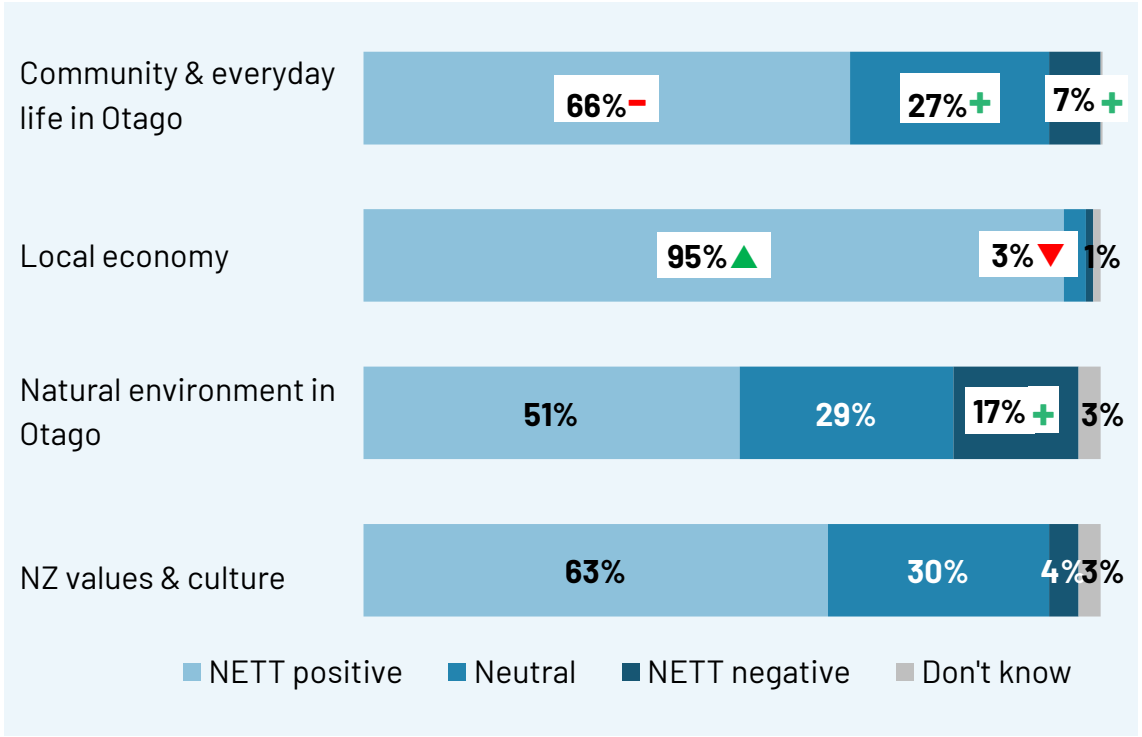
▼/▲ *is statistically significantly* ***higher/lower*** *than the total*

+/- *is statistically significantly* ***higher/lower*** *when comparing domestic tourism to international tourism*

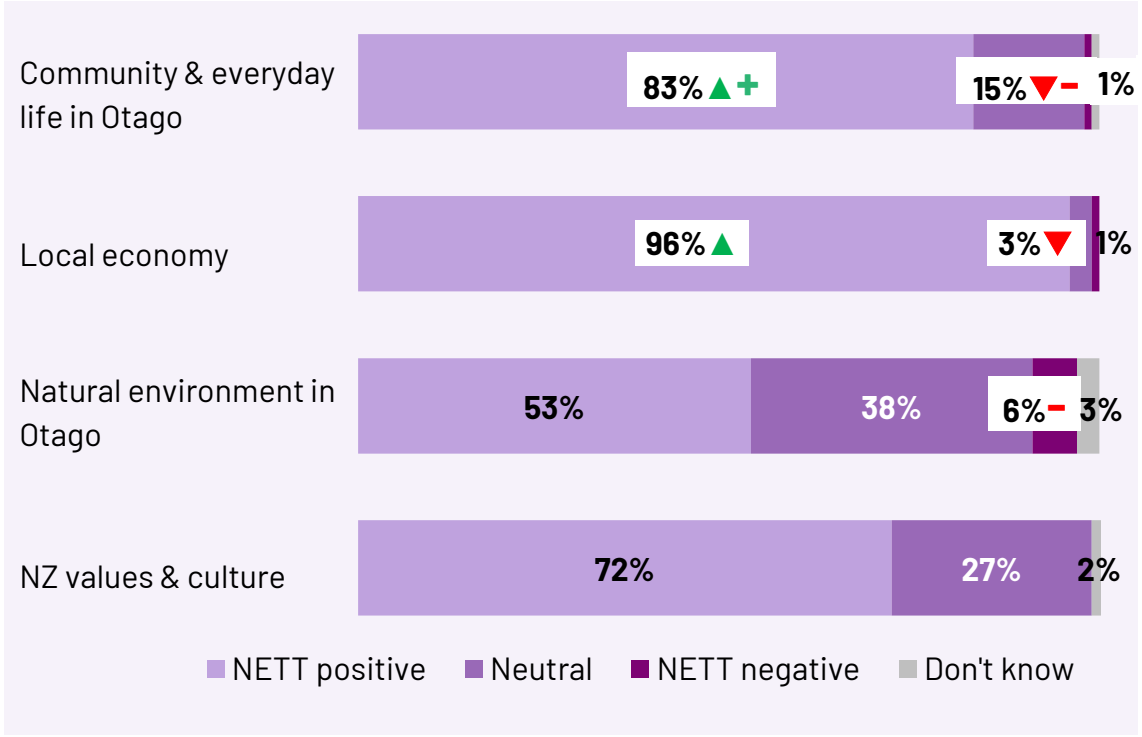
Dunedin residents: Impact of tourism on key regional aspects

Dunedin residents acknowledge the boost to the local economy *as the primary benefit of both international (95%) & domestic (96%) tourism. While 66% see international tourism as positively impacting* community life, *7% note a negative impact vs just 1% for domestic tourism. Further, 72% believe domestic tourism enhances* NZ values & culture, *compared to 63% for international tourism, which also has a negative perception among 4% vs 0% for domestic.* Environmental *impacts of tourism are perceived least positively, with international tourism viewed as having a considerably more negative impact (17%) on the* environment *than domestic tourism (6%).*

Impact of international tourism in Otago on key aspects



Impact of domestic tourism in Otago on key aspects



Q18: *Thinking about the impacts of international tourism to Otago, what impacts would you say international tourism in Otago has on... /* ***Q19:*** *Now thinking about domestic tourism what impacts would you say domestic tourism in Otago has on...*

Base: *Dunedin residents (n=100)*

▼/▲ *is statistically significantly* ***higher/lower*** *than the total*

+/- *is statistically significantly* ***higher/lower*** *when comparing domestic tourism to international tourism*

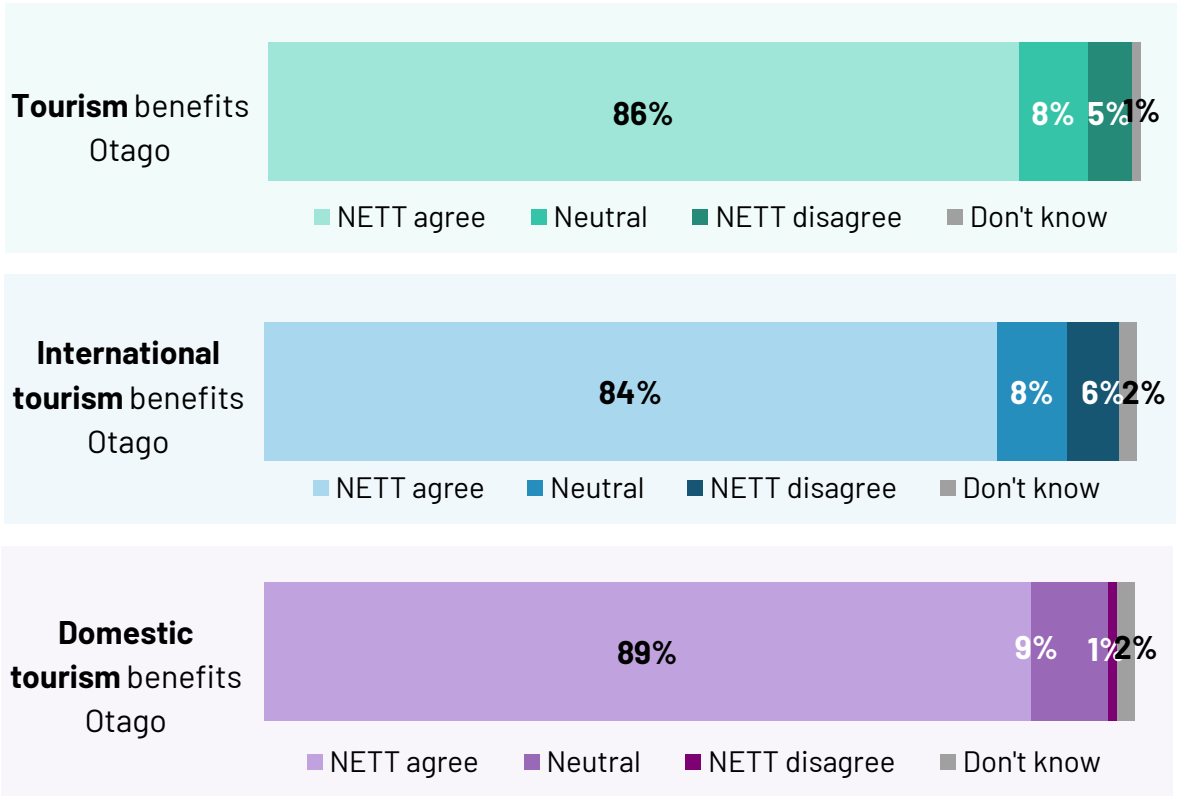
REST OF OTAGO



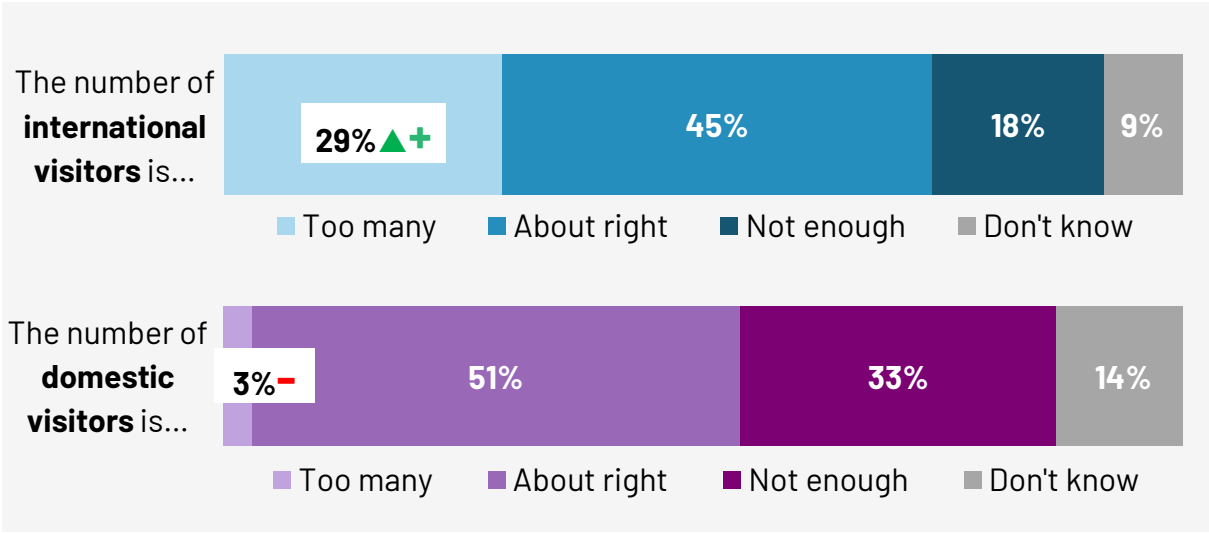
Rest of Otago residents: Tourism benefits & visitor numbers

Among residents in the rest of Otago, 86% believe that tourism benefits Otago. About half feel the region receives the 'right number' of international (45%) & domestic (51%) visitors during summer. Similar to Queenstown & Dunedin, Rest of Otago residents feel there are 'too many' international visitors (29%), while only 3% think there are 'too many' domestic visitors. One third (33%) believe there are 'not enough' domestic visitors to Otago in summer.

Perceived benefit of tourism to Otago



Perceived number of visitors in Otago during the summer



Q13: *How much do you agree or disagree with the following statements about tourism in Otago? /* ***Q14/Q17:*** *Thinking about tourism in Otago during the summer, do you think there are...*

Base: *Residents of all districts of Otago excluding Dunedin and Queenstown (n=64)*

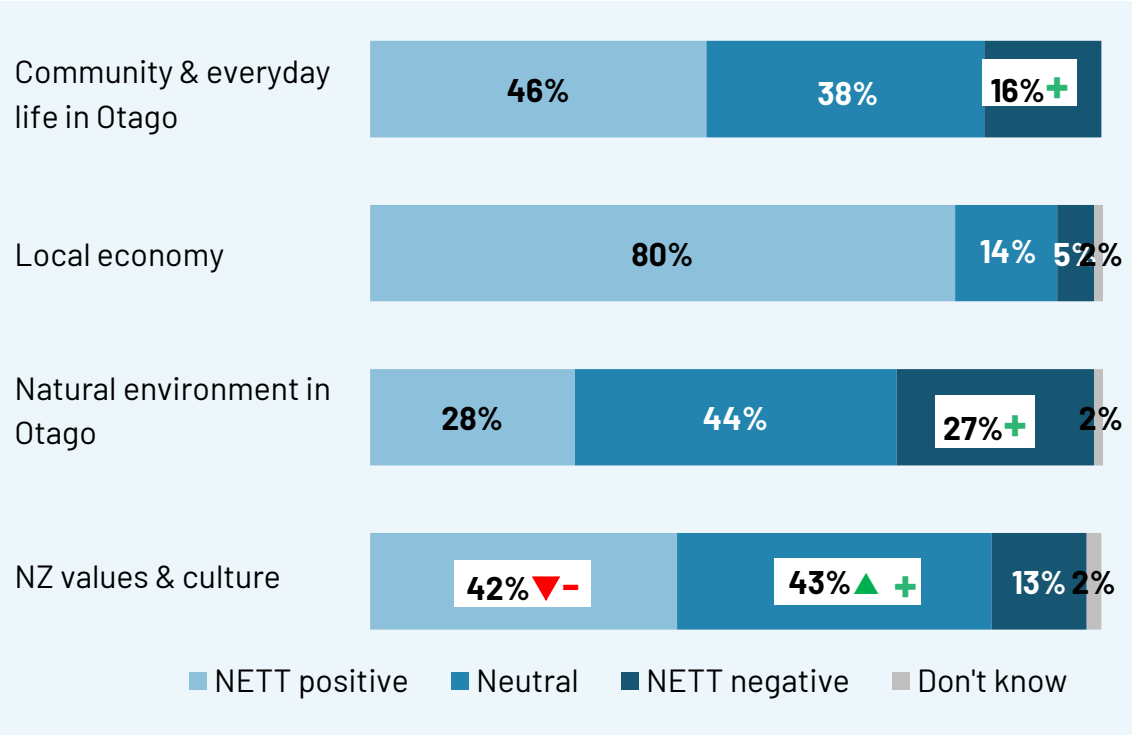
▼/▲ is statistically significantly higher/lower than the total

+/- is statistically significantly higher/lower when comparing domestic tourism to international tourism

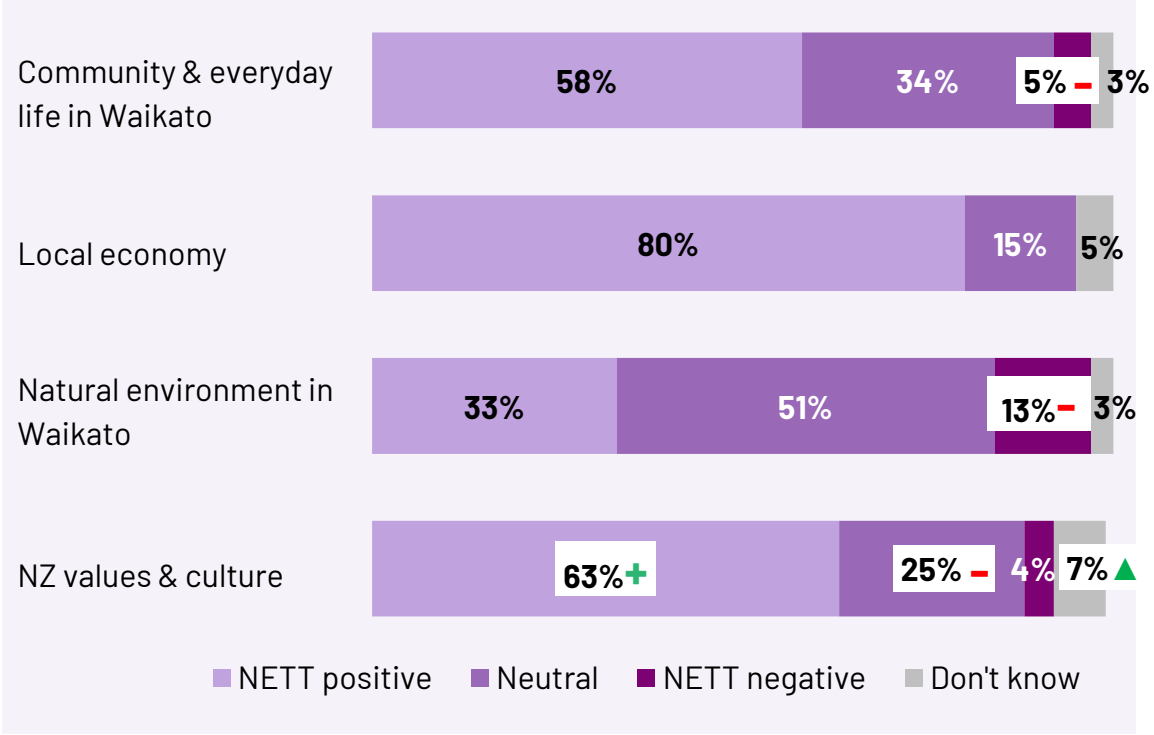
Rest of Otago: Impact of tourism on key regional aspects

Rest of Otago residents recognise the boost to the local economy *as the top benefit of both international (80%) & domestic (80%) tourism. Over half view domestic tourism as positively impacting* community & everyday life *(58%) &* NZ values & culture *(63%), whereas a smaller proportion stated the same about international tourism (46% & 42% respectively). The* natural environment *impact is viewed negatively, with international tourism seen as having about equal negative (28%) & positive (27%) impacts, while domestic tourism has 33% positive impact & 13% negative impact.*

Impact of international tourism in Otago on key aspects



Impact of domestic tourism in Otago on key aspects



Q18: *Thinking about the impacts of international tourism to Otago, what impacts would you say international tourism in Otago has on... /* ***Q19:*** *Now thinking about domestic tourism what impacts would you say domestic tourism in Otago has on...*

Base: *Residents of all districts of Otago excluding Dunedin and Queenstown (n=64)*

▼/▲ is statistically significantly **higher/lower** than the total

+/- is statistically significantly **higher/lower** when comparing domestic tourism to international tourism

8. APPENDIX



Additional context

In July 2025, the Ministry of Business, Innovation and Employment (MBIE) tasked Ipsos with conducting the biannual **'Tourism Sentiments Survey' (TSS)** for New Zealanders aged 18 and older.

This survey examines **perceptions of tourism's social, cultural, economic, and environmental impacts at regional and destination levels.**

Conducted biannually after each summer and winter season, the survey strategically over-represents smaller regions and key tourism destinations such as Queenstown and Rotorua.

The primary audience for these findings is the broader tourism and hospitality sector, particularly regional tourism organisations (RTOs).

Supported by the Tourism Evidence and Insights Centre, this initiative aims to deliver consistent and reliable tourism insights to enable sustainable decision-making.



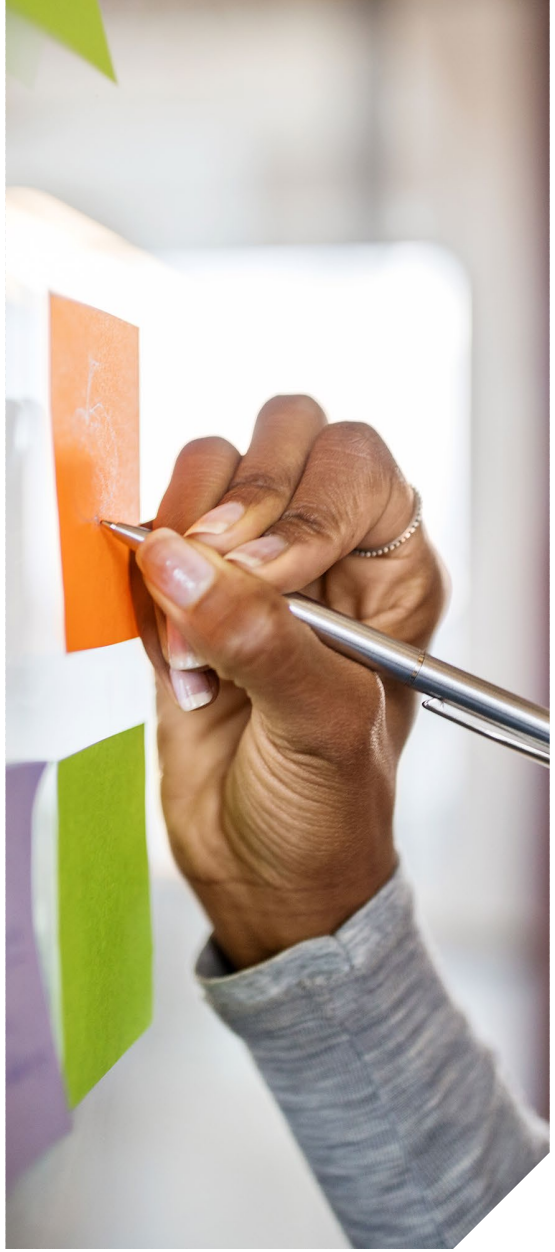
Survey development

In partnership, MBIE & Ipsos crafted the 12-minute TTS targeting the four primary objectives.

These questions will be consistent across each wave to track changes over time.

- Ipsos & MBIE conducted **stakeholder interviews** with Tourism NZ, Department of Conservation, Regional Tourism NZ & Tourism Industry Aotearoa to shape the survey's development.
- The survey benefited from **extensive review**, undergoing more than 19 rounds of revisions.
- **Language assessments** ensured accessibility for all respondents, examining vocabulary, jargon, sentence length & complexity.
- The survey was **cognitively tested** with 10 New Zealanders, leading to minor adjustments to enhance clarity & interpretation.
- Ipsos implemented thorough **QA processes**, including script & device testing (e.g. mobile & desktop).
- A **pilot test** was conducted with 30 participants to uncover any administrative issues & verify that responses were accurately captured prior to the full survey launch.





Achieved sample summer 2025/26

2,238 New Zealanders took part in wave 1, surpassing the 1,800 target.

Fieldwork: 9 Feb–9 March 2026. Participants shared views on tourism over the summer period – Dec 2025–Feb 2026.

Quotas for region, age, gender, and ethnicity were met through strategic oversampling, ensuring at least 60 responses per region/DOI.

The **survey achieved a 62% completion rate**, meaning 62% of panel participants who began the survey fully completed it. In panel calculating a traditional response rate is not feasible because participants are pre-recruited and agree to participate in multiple surveys over time.

Sampling method

The survey aims to gather insights from up to 1,800 New Zealanders aged 18+, twice a year after the summer & winter tourism seasons.

This approach ensures representation across region, gender and age.

There is a strategic over-representation of smaller regions & DOI or tourist hubs, such as Queenstown & Rotorua. This strategy provides valuable insights for key stakeholders, including RTOs & the wider tourism & hospitality sectors.

Participants were recruited via a blend of multiple online panels & non-panel sample sources (e.g. river sampling), reaching them in digital spaces such as online games & social media.

Strict quotas were applied for age, gender, ethnicity & region, while more flexible quotas at the regional level ensured the sample was balanced, avoiding skewed demographics, e.g. an overwhelmingly female sample in Auckland.

Other demographic factors such as urban/rural split, household income, education, length of time in New Zealand were monitored.

In panel surveys, where participants are pre-recruited for multiple surveys, traditional response rates do not apply. The survey's robustness & integrity rely on a large sample size & comprehensive demographic representation, achieved by adhering to strict quotas across regions, age, ethnicity & gender.

Data cleaning & weighting

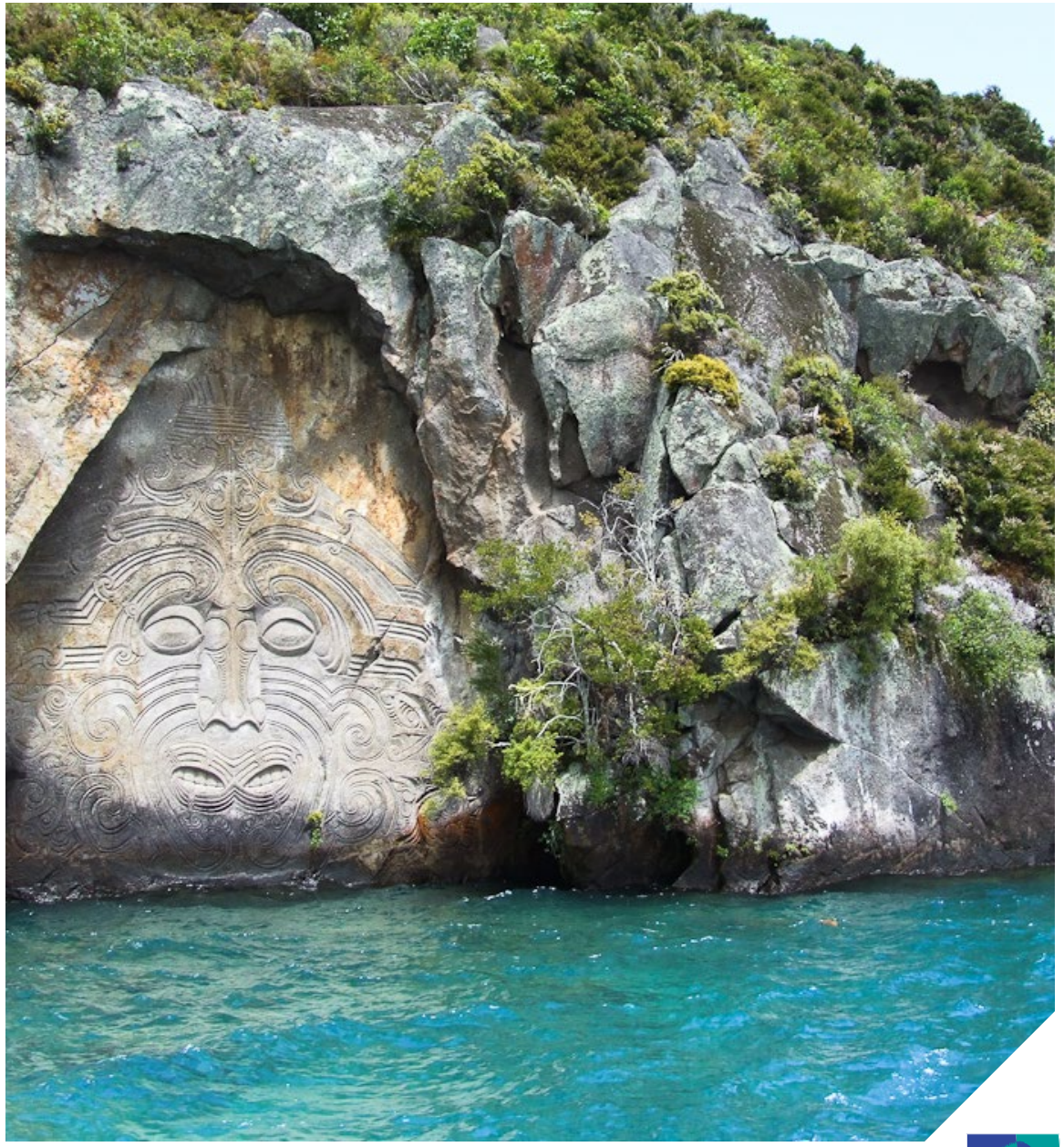
Data cleaning

From the initial 2,257 responses, **19 responses were considered low quality and removed**, leaving 2,238 valid responses.

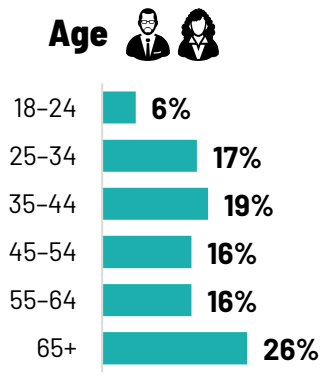
The data was meticulously reviewed, with a focus on verbatim responses to ensure relevance, coherence, engagement, while also checking for duplication. While completion speed, measured by responses finished in less than one third of the median time, was used as a secondary indicator for flagging possible issues, the main criterion for exclusion focused on content quality. Responses were also evaluated for flatlining – repetitive patterns in at least two thirds of questions, such as selecting the same option consistently, following obvious patterns like alternating between options, and providing contradictory answers across related questions.

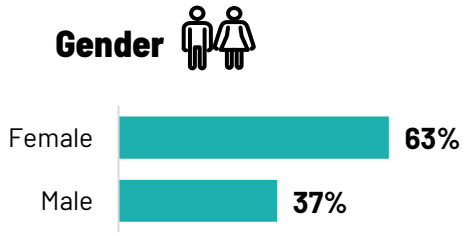
Data weighting

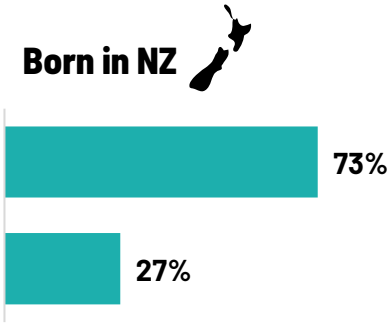
- The topline report findings are representative of the NZ population.
- Data weighting by region, age and gender aligns with the 2023 NZ census population data.
- A 62.6%RIM weighting efficiency was achieved.

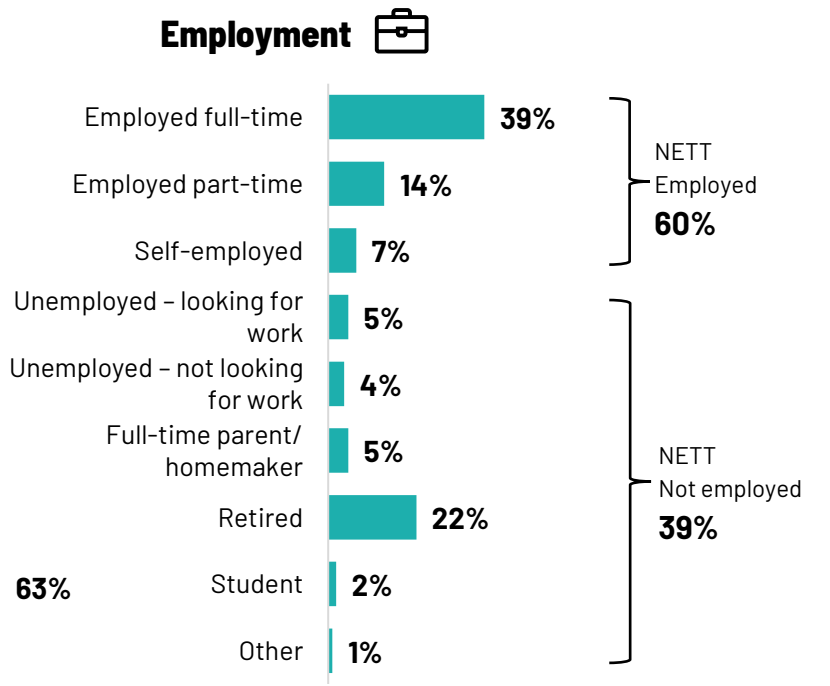


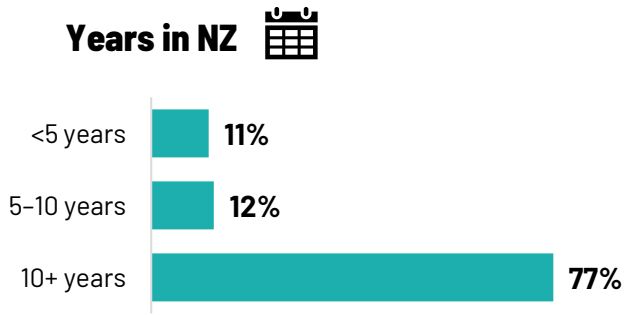
Summer 2025/26 achieved sample demographics *(unweighted)*

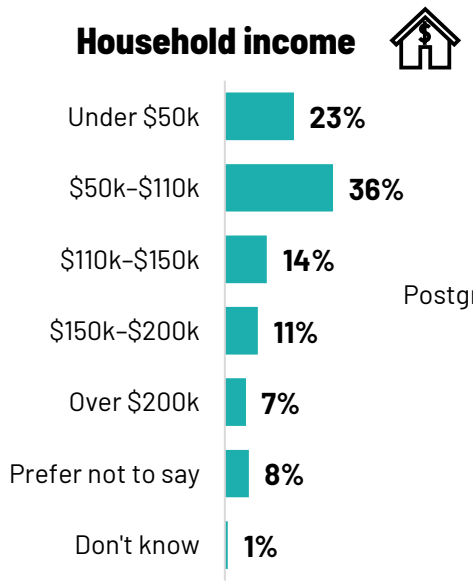


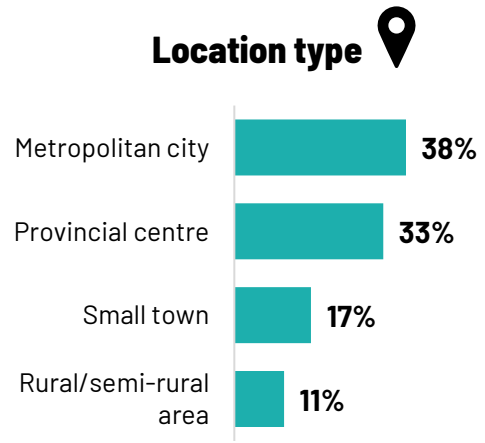


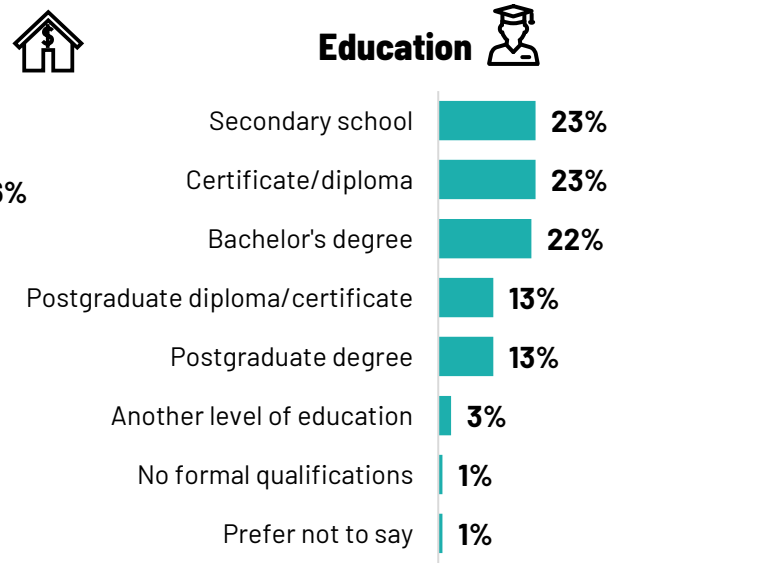


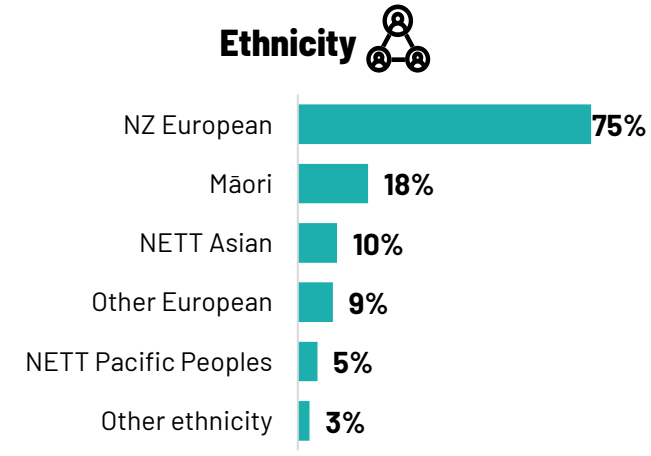








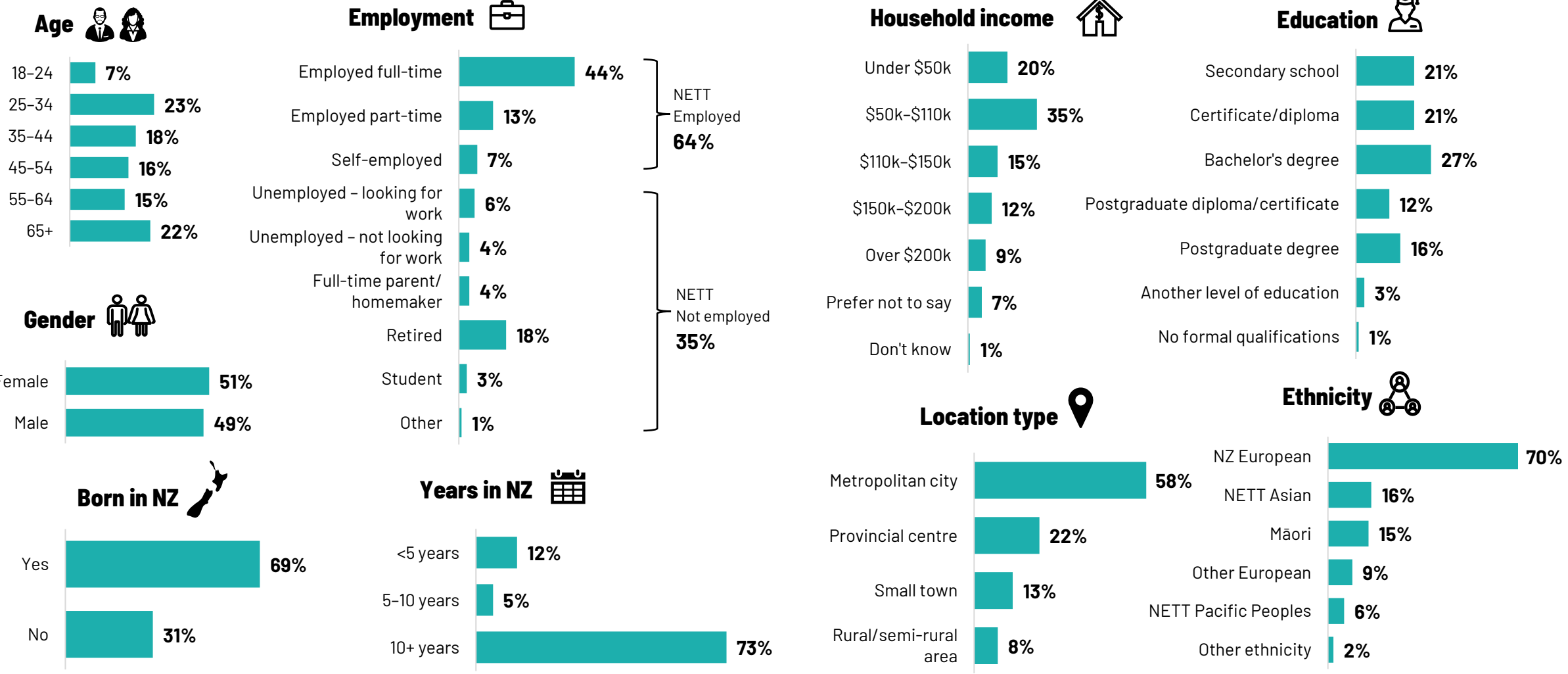




YEAR/MONTH: *What is your date of birth? /* ***GENDER:*** *Are you...? /* ***D0:*** *Which of the following best describes where you usually live? /* ***D5:*** *What is your current employment status? /* ***NZ01ETH:*** *Which ethnic group(s) do you belong to? Please select all that apply. /* ***D6:*** *What is the combined annual income of your household from all sources before tax? /* ***D4:*** *What is your highest completed educational qualification? /* ***QD1:*** *Were you born in New Zealand? /* ***QD2:*** *How many years, in total, have you been living in New Zealand?*

Base: *Total sample (n=2,238)*

Summer 2025/26 sample demographics *(weighted)*



YEAR/MONTH: *What is your date of birth? /* ***GENDER:*** *Are you...? /* ***D0:*** *Which of the following best describes where you usually live? /* ***D5:*** *What is your current employment status? /* ***NZ01ETH:*** *Which ethnic group(s) do you belong to? Please select all that apply. /* ***D6:*** *What is the combined annual income of your household from all sources before tax? /* ***D4:*** *What is your highest completed educational qualification? /* ***QD1:*** *Were you born in New Zealand? /* ***QD2:*** *How many years, in total, have you been living in New Zealand?*

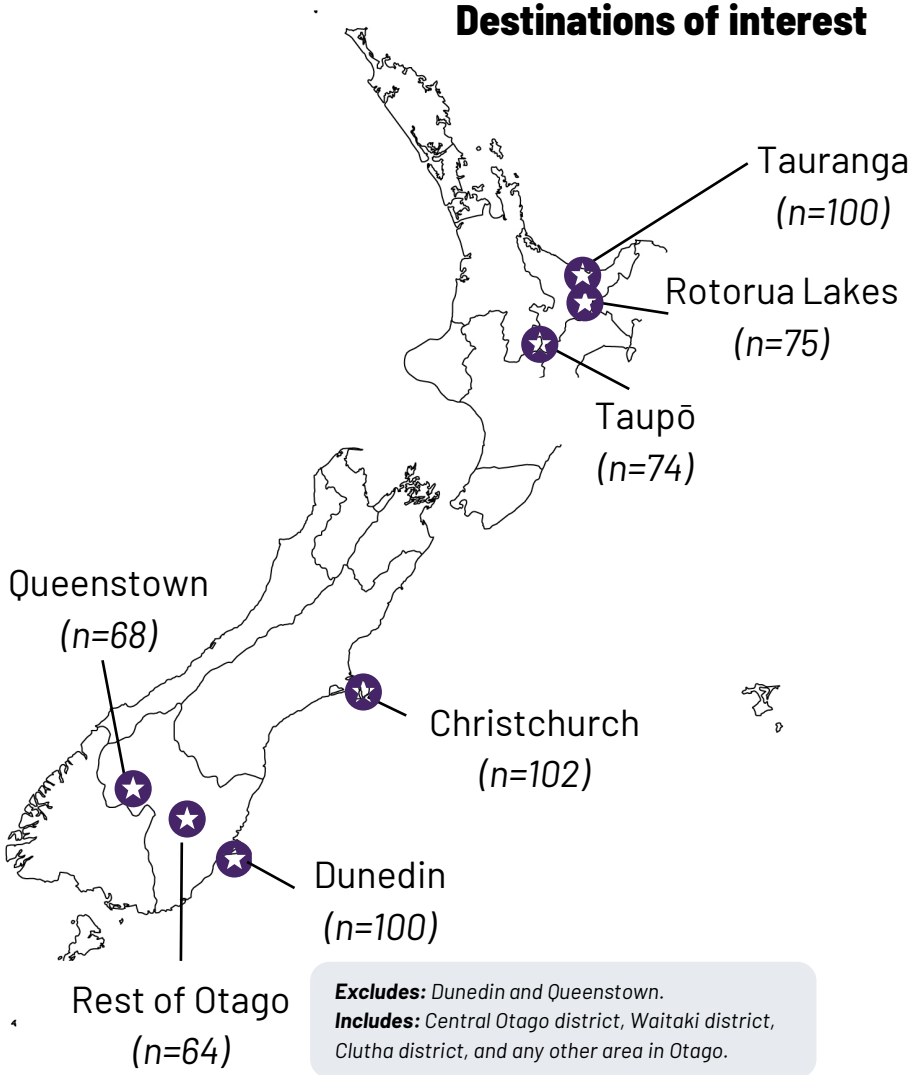
Base: *Total sample (n=2,238)*

Summer 2025/26 achieved sample demographics *(unweighted)*

Regions

		2023 Census %
Northland *(n=102)*	5%	4%
Auckland *(n=352)*	16%	33%
Waikato *(n=265)*	12%	10%
Bay of Plenty *(n=226)*	10%	6%
Gisborne *(n=74)*	3%	1%
Hawke's Bay *(n=99)*	4%	3%
Manawatū-Whanganui *(n=100)*	3%	5%
Taranaki *(n=75)*	4%	2%
Wellington *(n=150)*	7%	11%
Tasman *(n=98)*	4%	1%
Nelson *(n=75)*	3%	1%
Marlborough *(n=75)*	3%	1%
West Coast *(n=65)*	3%	1%
Canterbury *(n=150)*	7%	13%
Otago *(n=232)*	10%	5%
Southland *(n=100)*	4%	2%

Destinations of interest



Excludes: *Dunedin and Queenstown.*
Includes: *Central Otago district, Waitaki district, Clutha district, and any other area in Otago.*

All regions and destinations of interest (DOIs) achieved a minimum sample size of 60, ensuring a reasonable level of reliability in the results at the regional level.

However, caution is advised when interpreting data from regions with smaller achieved samples (e.g. West Coast n=65), as precision may be lower.

Credibility intervals by region and DOI can accessed by contacting MBIE at tr_sharedmailbox@mbie.govt.nz

QREGION: *Which region do you live in? Please select one only.* / ***BOP_LOCATION:*** *Which district of the Bay of Plenty region do you live in? Please select one only.* / ***WAIKATO_LOCATION:*** *Which district of the Waikato region do you live in? Please select one only.* / ***CANTERBURY LOCATION:*** *Which district of the Canterbury region do you live in? Please select one only.* / ***OTAGO_LOCATION:*** *Which district of the Otago region do you live in? Please select one only.*

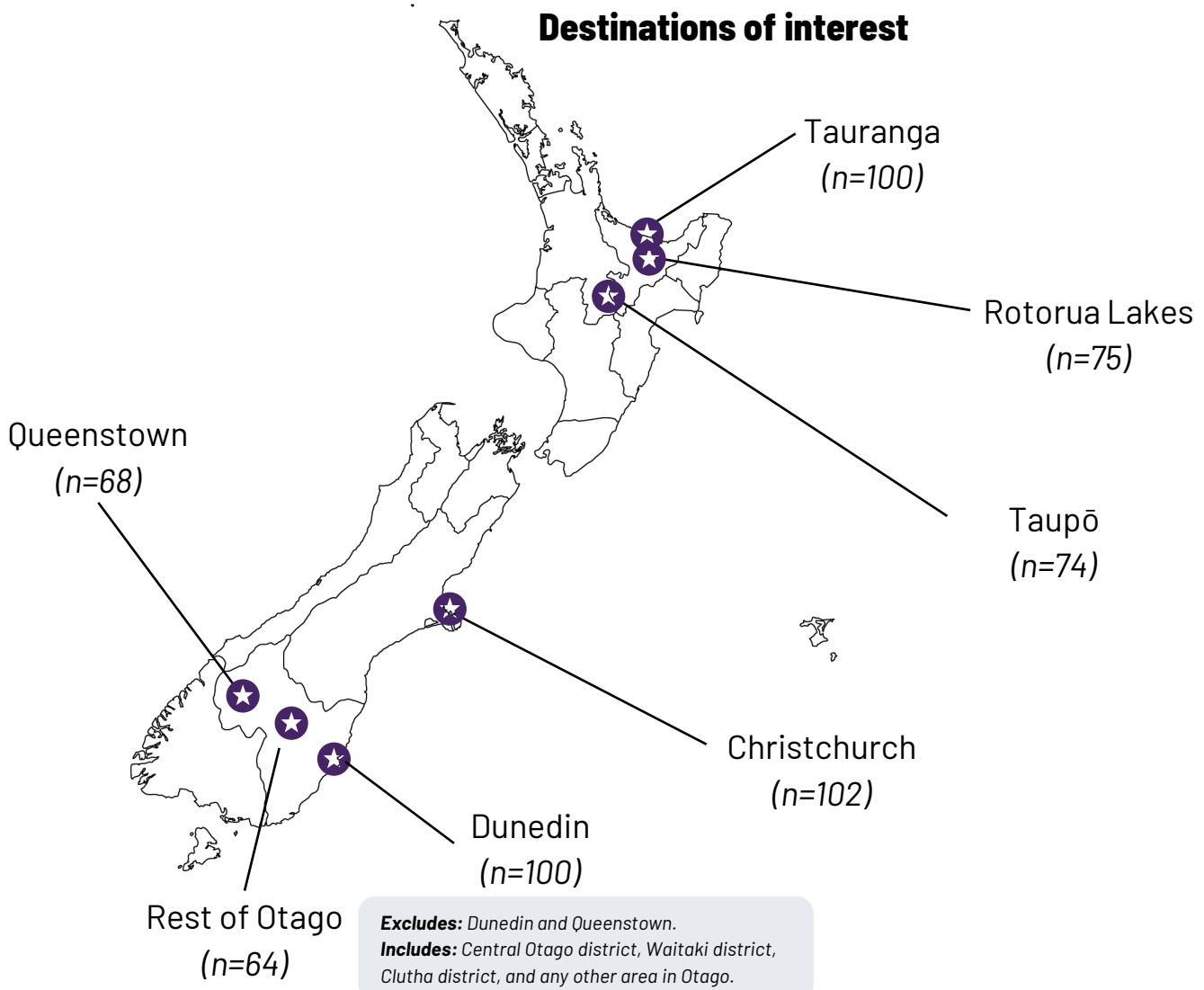
Base: *Total sample (n=2,238)*

Summer 2025/26 sample demographics *(weighted)*

Regions

Northland *(n=102)*	4%
Auckland *(n=352)*	33%
Waikato *(n=265)*	10%
Bay of Plenty *(n=226)*	7%
Gisborne *(n=74)*	1%
Hawke's Bay *(n=99)*	3%
Manawatū-Whanganui *(n=100)*	5%
Taranaki *(n=75)*	2%
Wellington *(n=150)*	11%
Tasman *(n=98)*	1%
Nelson *(n=75)*	1%
Marlborough *(n=75)*	1%
West Coast *(n=65)*	1%
Canterbury *(n=150)*	13%
Otago *(n=232)*	5%
Southland *(n=100)*	2%

Destinations of interest



Excludes: *Dunedin and Queenstown.*
Includes: *Central Otago district, Waitaki district, Clutha district, and any other area in Otago.*

QREGION: *Which region do you live in? Please select one only.* / ***BOP_LOCATION:*** *Which district of the Bay of Plenty region do you live in? Please select one only.* / ***WAIKATO_LOCATION:*** *Which district of the Waikato region do you live in? Please select one only.* / ***CANTERBURY LOCATION:*** *Which district of the Canterbury region do you live in? Please select one only.* / ***OTAGO_LOCATION:*** *Which district of the Otago region do you live in? Please select one only.*

Base: *Total sample (n=2,238)*

Summer 2025/26 demographics used for weighting *(counts)*

- The tables illustrate the unweighted counts (achieved sample) next to the adjusted values post weighting, which are used in reporting.
- This comparison shows how sample representation is adjusted to match NZ population metrics, ensuring accurate reflection of the target demographic.
- Data has been weighted to the 2023 NZ census population data by region, age and gender achieving a RIM weighting efficiency of 62.6%.

Region	Unweighted		Weighted	
Total	***2,238***	**%**	***2,238***	**%**
Northland	*102*	5%	*86*	4%
Auckland	*352*	16%	*737*	33%
Waikato	*265*	12%	*219*	10%
Bay of Plenty	*226*	10%	*147*	7%
Gisborne	*74*	3%	*22*	1%
Hawke's Bay	*99*	4%	*77*	3%
Taranaki	*75*	4%	*55*	2%
Manawatū-Whanganui	*100*	3%	*112*	5%
Wellington	*150*	7%	*239*	11%
Tasman	*98*	4%	*27*	1%
Nelson	*75*	3%	*24*	1%
Marlborough	*75*	3%	*23*	1%
West Coast	*65*	3%	*16*	1%
Canterbury	*150*	7%	*297*	13%
Otago	*232*	10%	*113*	5%
Southland	*100*	4%	*45*	2%

Gender	Unweighted		Weighted	
Total	***2,238***	**%**	***2,238***	**%**
Male	*827*	63%	*1,088*	49%
Female	*1,403*	37%	*1,137*	51%

Age	Unweighted		Weighted	
Total	***2,238***	**%**	***2,238***	**%**
18–24	*125*	6%	*158*	7%
25–34	*391*	17%	*506*	23%
35–44	*419*	19%	*398*	18%
45–54	*365*	16%	*347*	16%
55–64	*348*	16%	*344*	15%
65+	*590*	26%	*484*	22%

YEAR/MONTH: *What is your date of birth? /* ***GENDER:*** *Are you...? /* ***QREGION:*** *Which region do you live in? Please select one only.*
Base: *Total sample (n=2,238)*

THANK YOU

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DETAILS:
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