

## Tourism Sentiment Survey (TSS) and Views on Tourism (VoT) comparison

The tables below compare key indicators between the Tourism Sentiment Survey (Summer 2025/26) and Views on Tourism (year ended December 2025) and methodologies. Differences in these results are likely to be attributable to the survey methodology applied, including the sampling approach, timing of the fieldwork and questionnaire design.

### Key indicators comparison – Tourism Sentiment Survey (TSS) and Views on Tourism (VoT)

Theme	TSS – Summer 2025/26	VoT – year ended December 2025
Tourism benefits New Zealand (overall)	91 per cent agree tourism benefits NZ 90 per cent agree international tourism benefits NZ 89 per cent agree domestic tourism benefits NZ	95 per cent agree tourism is good for NZ 94 per cent agree international tourism is good for NZ 94 per cent agree domestic tourism is good for NZ
Tourism benefits respondent's region	86 per cent agree tourism benefits their region	90 per cent say tourism is good for their region
Tourism as a national issue	1 per cent rank tourism in top three national issues	Not measured
International visitor numbers – 'about right'	48 per cent say the number of international visitors is about right	Not measured
International visitors – pressure vs numbers	10 per cent say there are too many international visitors	38 per cent say visitors put too much pressure on NZ
Domestic visitor numbers – 'about right'	48 per cent say the number of domestic visitors is about right	Not measured
Economic benefit of tourism	95 per cent say tourism benefits the NZ economy	82 per cent say they personally benefit from tourism
Key economic benefits	Economic growth 60 per cent; jobs/income 59 per cent	Employment/income 36 per cent; support for local businesses 35 per cent
Negative impacts – environment	83 per cent identify environmental impacts as a concern	Almost two-thirds are at least 'somewhat concerned' about environmental impact
Negative impacts – community / everyday life	81 per cent identify community impacts as a concern	73 per cent report any negative impacts overall
Engagement with tourism decision-making	>80 per cent have not had a say; 27 per cent want more involvement	4 per cent have participated in public consultation or planning processes affecting tourism; 7 per cent want more engagement
Worked in the tourism sector (past 12 months)	11 per cent report working in tourism	7 per cent in paid employment for a tourism sector organisation; 7 per cent employed in services for visitors or tourism businesses

## Survey methodology comparison (at a glance): TSS vs VoT

Aspect of method	Tourism Sentiment Survey – Summer 2025/26 (Wave 1)	Views on Tourism – New Zealand (YE Dec 2025)
<b>Purpose</b>	Understand <b>resident sentiment and perceived impacts</b> post-season, with strong <b>regional and destination focus</b>	Track <b>resident social licence and attitudes</b> to tourism over time
<b>Survey owner / provider</b>	MBIE / Ipsos	Tourism New Zealand / Angus & Associates
<b>Frequency</b>	Biannual (post-summer and post-winter)	Continuous, reported annually
<b>Fieldwork period</b>	Single wave, post-summer (Summer 2025/26). This TSS wave was in the field 9/02/26-9/03/26.	Continuous collection across the year (Jan–Dec 2025)
<b>Target population</b>	NZ residents aged 18+	NZ residents aged 18+
<b>Sample size</b>	n = 2,238 (Wave 1 only)	≥250 per month; n = 3,164 annually
<b>Sampling approach</b>	Non-probability online sample (multiple panels + river sampling)	Online panel + targeted intercepts ie fieldwork (Rotorua, Queenstown)
<b>Regional coverage</b>	Full regional coverage + destinations of interest, minimum ~60 per area	National + regions (some regions grouped due to size)
<b>Oversampling</b>	Deliberate oversampling of small regions and key destinations	Limited – some regional boosting only
<b>Weighting</b>	RIM weighting by region, age, gender, ethnicity Weighted using 2023 Census data	Post-stratification by age, gender, region Weighted using 2023 Census data
<b>Weighting efficiency</b>	62.6% RIM weighting efficiency for reporting at the regional level.	Not explicitly reported
<b>Trend measurement</b>	Designed for trend, but Wave 1 only so far	Strong trend continuity (long-running programme)
<b>Key headline metric</b>	Percent agrees / sentiment measures + regional diagnostics	Tourism Approval Rating (TAR) – social licence index
<b>Treatment of uncertainty</b>	Credibility intervals by region & destination, flagged when >±10%	Significance testing reported; no explicit CI by region
<b>Reporting caution</b>	Explicit CI thresholds; cautious interpretation clearly signposted	Notes small regional bases are “indicative only”