



**MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
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Methodology Update Notice | Volumes & Flows

Volumes & Flows series | July 2026 release

Produced by Vistr Limited for the TEIC
August 2026

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People, Places
and Patterns

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Introduction

The July 2026 release of the Tourism Volumes & Flows (TV&F) insights series reinstates the international components of the series, following a transition to an improved underlying telco data feed. The updated feed applies from 1 April 2026 and incorporates several methodological improvements that increase coverage and representativeness, particularly in areas with lower visitation and lighter cellular coverage.

This primer describes the changes that have been made, what users can expect to see in the updated data, and how to interpret differences from previously published values. It accompanies the user guidance as made available with original releases.

 Note: Values for periods before 1 April 2026 are unchanged from the previous release. The updated feed and associated methodology improvements apply from 1 April 2026 onwards.

What has changed

1. Transition to an improved telco data feed

Following network hardware changes made by our telco data partner, the TV&F series is now produced from an updated data feed, effective 1 April 2026. The updated feed observes a larger and more representative panel of devices than the previous feed. Coverage improves across the country, with the largest gains in areas with lower visitation and lighter cellular coverage, which were previously the most likely to be under-represented. We also used this transition as an opportunity to implement some refinements to the initial telco treatment methodology for improved representativeness going forwards.

2. Improved device identification and home-location assignment

The updated feed identifies personal devices more accurately. Two improvements matter for the published outputs:

- Non-personal devices (such as IoT sensors and monitoring equipment) are now identified from device identifiers that unambiguously distinguish a phone from an IoT device, rather than being inferred from device behaviour;
- Each device's home location is assigned more accurately, so devices are more reliably classified as local residents or as domestic visitors.

Together, these mean devices are more reliably recognised as local residents versus domestic visitors – the driver of the most visible change in this release, the step decrease in domestic monthly unique visitor counts described in the next section.

3. Updated segmentation of international length of stay

The method used to segment international devices by length of stay has been updated, improving the representation of international visitors – in particular repeat international visitors, who were previously more likely to be under-counted in regions they return to frequently.

4. Increased resolution in low-count areas

The updated feed reports counts at the lower end of the value range with greater resolution. Small-area counts that were previously reported at either a minimum reporting value or zero / null value are now resolved with more precision, improving the representation of areas with low visitor activity. The privacy protections applied to the data are unchanged: the same rounding and minimum-count rules apply in the previous and updated feeds but the overall increase in the captured device panel results in an overall shift into higher value bands.

Impact on outputs

A change point at 1 April 2026

Because the updated feed begins on 1 April 2026 and earlier periods are unchanged, the improvements introduce a change point in the series at that date. Comparisons made entirely within the period from April 2026 onwards, or entirely within the period before it, remain valid. Comparisons that span 1 April 2026 – including year-on-year comparisons for April 2026 onwards – combine the effect of the methodology improvements with genuine changes in visitation, and should be treated with care. The measures and regions where this matters most are set out below, so users know where to look.

Extensive testing and validation has been carried out to separate, as far as possible, the effect of the methodology change from genuine visitation dynamics, and to assess the comparative representativeness of the pre- and post-April series. This includes segment-level comparison across the change point (the movement is confined to the measures the methodology affects, while related measures remain continuous); benchmarking of local counts against the Stats NZ estimated resident population; benchmarking of implied length of stay against the first round of the Domestic Visitor Survey; and validation of international movements against airport arrivals and transaction data.

Together, these tests provide confidence that the post-April outputs are a more representative measure of underlying visitation, and they inform the specific guidance set out below.

Monthly unique visitor counts: a decrease in domestic, an increase in local

The most visible change in this release is in monthly unique counts, and it affects the domestic and local outputs in opposite directions: domestic monthly unique visitor counts step down materially from April 2026, while reported local (resident) counts increase

moderately with the exception of a handful of destinations that have notably high domestic visitor to resident ratio. International unique visitor counts are largely unchanged.

These movements share related causes, and the correction is not only a reassignment from domestic to local. Under the previous feed, some devices belonging to local residents – particularly devices that move less often or show little use – were excluded as IoT devices, while others were counted as domestic visitors. The updated feed identifies devices from unambiguous device identifiers and assigns home locations more accurately, so these devices are now correctly counted as local residents; a further group of non-personal devices previously counted as visitors is now excluded altogether. Because device counts are scaled against the national de facto population – and because a domestic visitor is counted in each region they visit, while a local resident is counted once – the same correction registers far more strongly in the domestic visitor counts than in the local counts. The lower domestic counts are a more accurate measure of the same underlying visitation, not a decline in actual visitor numbers.

For reference, international unique counts continue their longer-term trends across the change point, with the April–July 2026 period showing significant increases in international visitor activity following a series of successful boost-funded initiatives (Figure 2).

Domestic visitors vs local residents: monthly unique counts

Sum across RTOs, Jan 2025 – Jul 2026 — domestic corrects down; local (anchored to resident population) edges up

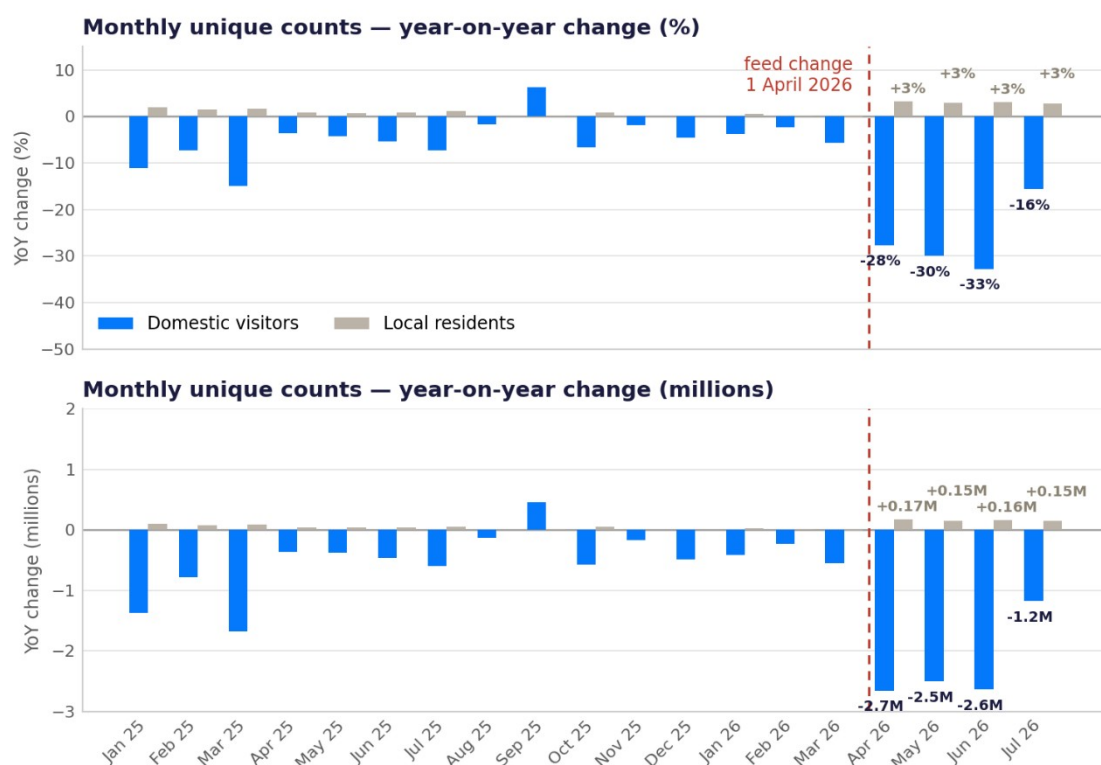


Figure 1. Domestic visitors versus local residents, monthly unique counts: year-on-year change in percentage terms (top) and absolute terms (bottom). The domestic correction coincides with a rise in local counts, which remain anchored to the resident population.

Domestic vs international: year-on-year change by month

Sum across RTOs, Jan 2025 – Jul 2026 — the April 2026 step appears only in the domestic series (labels: domestic)

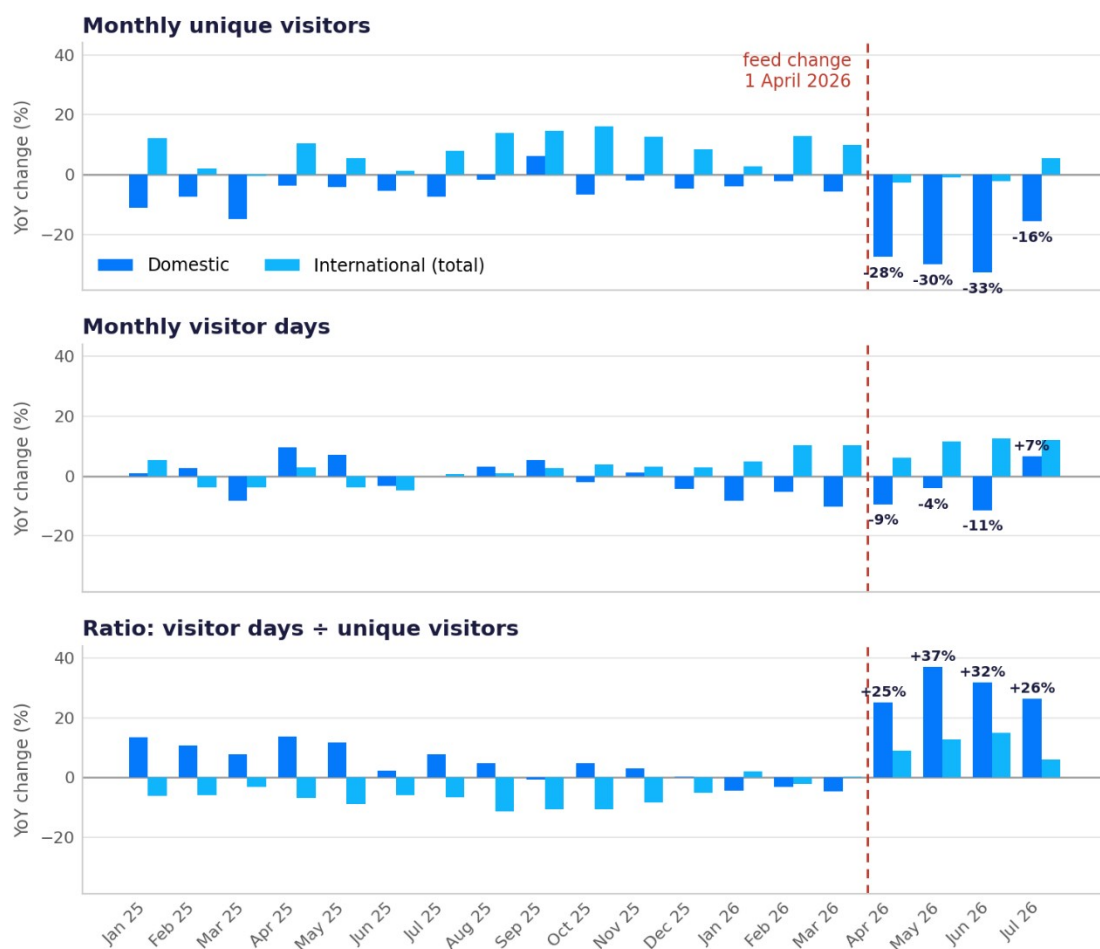


Figure 2. Domestic versus international outputs, year-on-year change by month. The April 2026 step appears only in domestic unique counts; visitor days and the international series are broadly continuous.

Both sides of this shift have been benchmarked independently:

- Local counts now align more closely with the population. Monthly unique local counts track the Stats NZ estimated resident population (ERP) at regional level, and the distribution of locals across the country matches the distribution of residents more closely than under the previous feed. Giving each region equal weight, alignment with the ERP improves from an R^2 of approximately 0.93 to 0.98; alignment for the largest regions is comparable in both feeds.
- Domestic visitor counts now align more closely with relevant survey data. Benchmarked against the first round of the Domestic Visitor Survey (DVS), the ratio of visitor days to unique visitors, which is a proxy for implied length of stay, matches the survey more closely under the new feed (Figure 3). This comparison has its own limitations: it is based on the first round of the DVS, without a full year of overlap between the two measures, and the ratio of visitor days to unique visitors is only a proxy for length of stay, subject to the limitations set out in the user guide (for

example, the improved capture of more transient visitors). However, it provides confidence that the updated feed offers a more faithful representation.

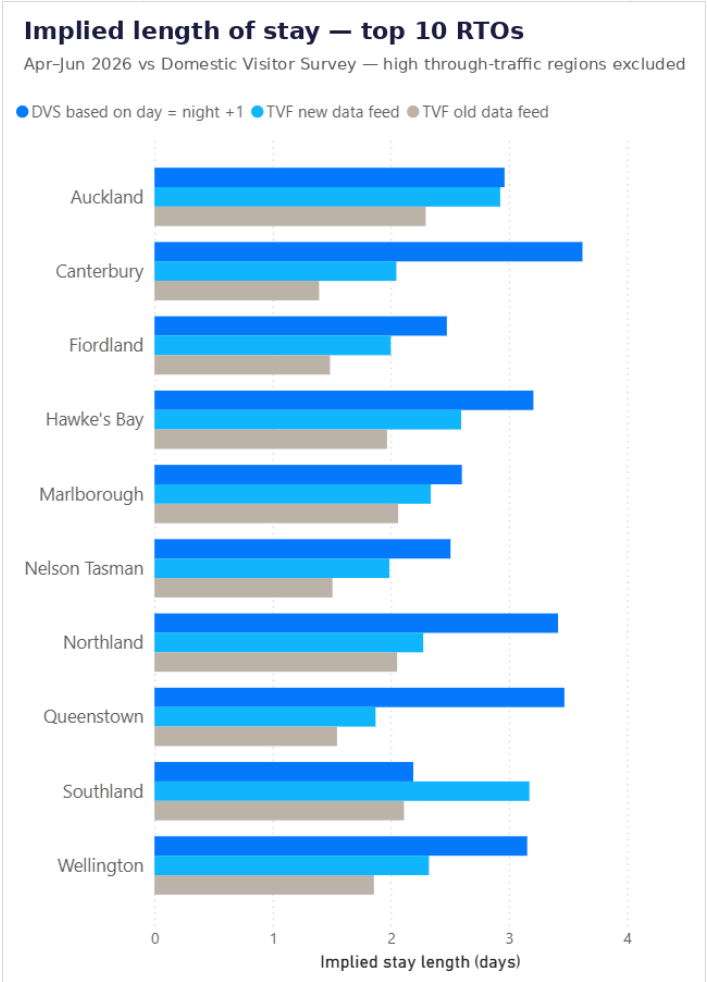


Figure 3. Implied length of stay, top 10 RTOs by stay length (high through-traffic regions excluded): Domestic Visitor Survey benchmark versus the updated and previous feeds, April–June 2026.

We will continue to monitor this alignment over the coming releases and are investigating whether a revision of historic monthly unique figures is appropriate, so that the full series can be used on a consistent basis. Any revision will be notified in advance.

Domestic monthly unique visitors, by RTO

Solid: Apr 2025 – Jul 2026. Dotted: same month one year earlier. Counts step below the prior-year path at the 1 April 2026 feed change — the corrected counts remove local residents previously misclassified as visitors. Shaded area: months on the updated feed. Y-axis scaled per region.

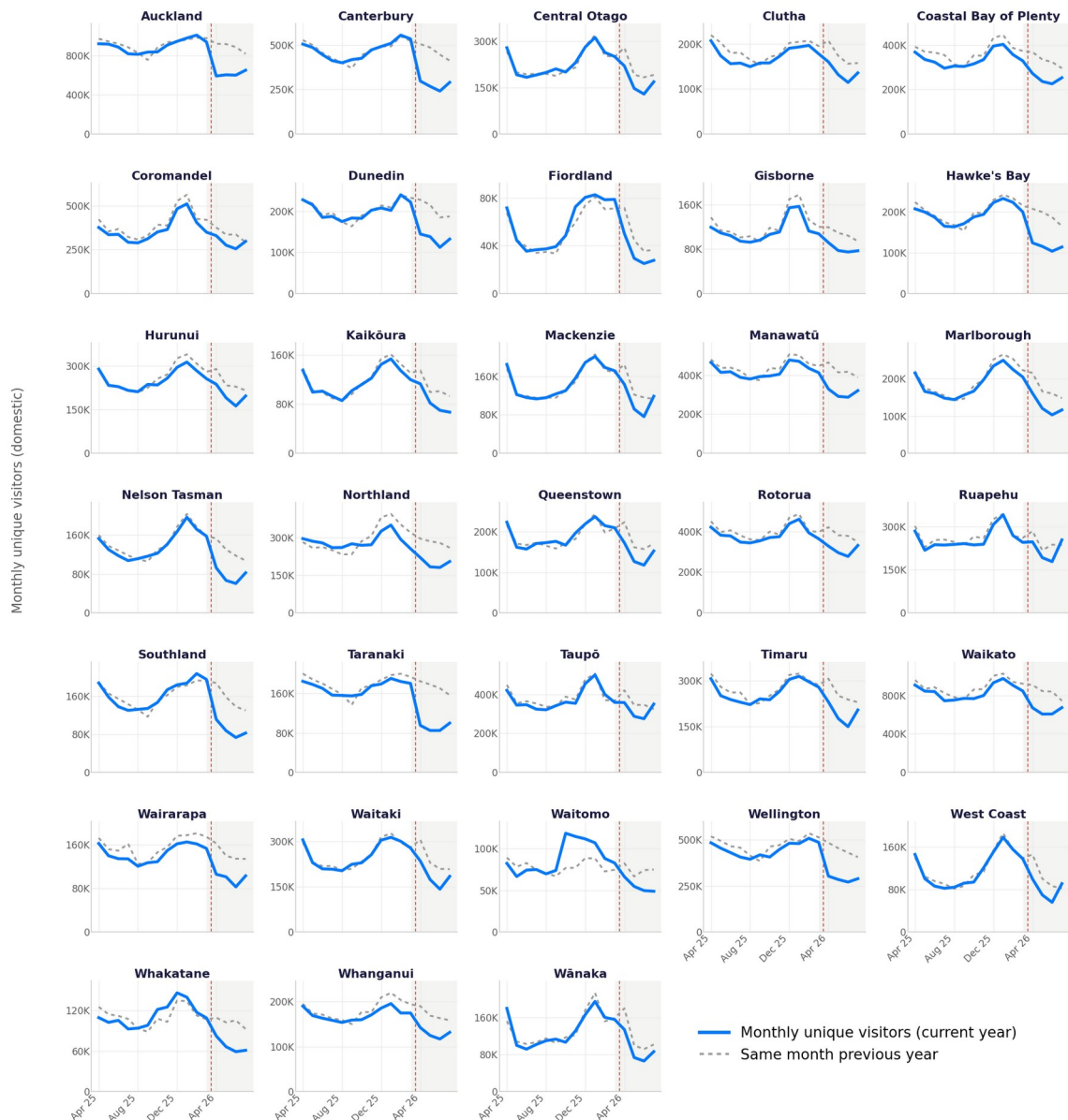


Figure 4. Domestic monthly unique visitors by RTO: April 2025 – July 2026 (solid) versus the same month one year earlier (dotted). Counts step below the prior-year path at the feed change in every region. Y-axis scaled per region.

The visitation ratio: a corresponding step increase

Users who calculate a visitation ratio by dividing monthly visitor days by monthly unique visitors (i.e. an implied average length of stay) will observe a step increase from April 2026. This is an arithmetic consequence of the more accurate (lower) denominator, not a change in visitor behaviour. This ratio is an indicative comparison rather than a modelled output, and existing limitations apply — in particular, implied stay length is less reliable for regions with high through-traffic, as set out in the methodology documentation.

Domestic visitation ratio: visitor days ÷ monthly unique visitors, by RTO

Solid: Apr 2025 – Jul 2026. Dotted: same month one year earlier. The ratio steps above its prior-year path at the 1 April 2026 feed change, reflecting the corrected (lower) unique counts — not a change in visitor behaviour. Shaded area: months on the updated feed.

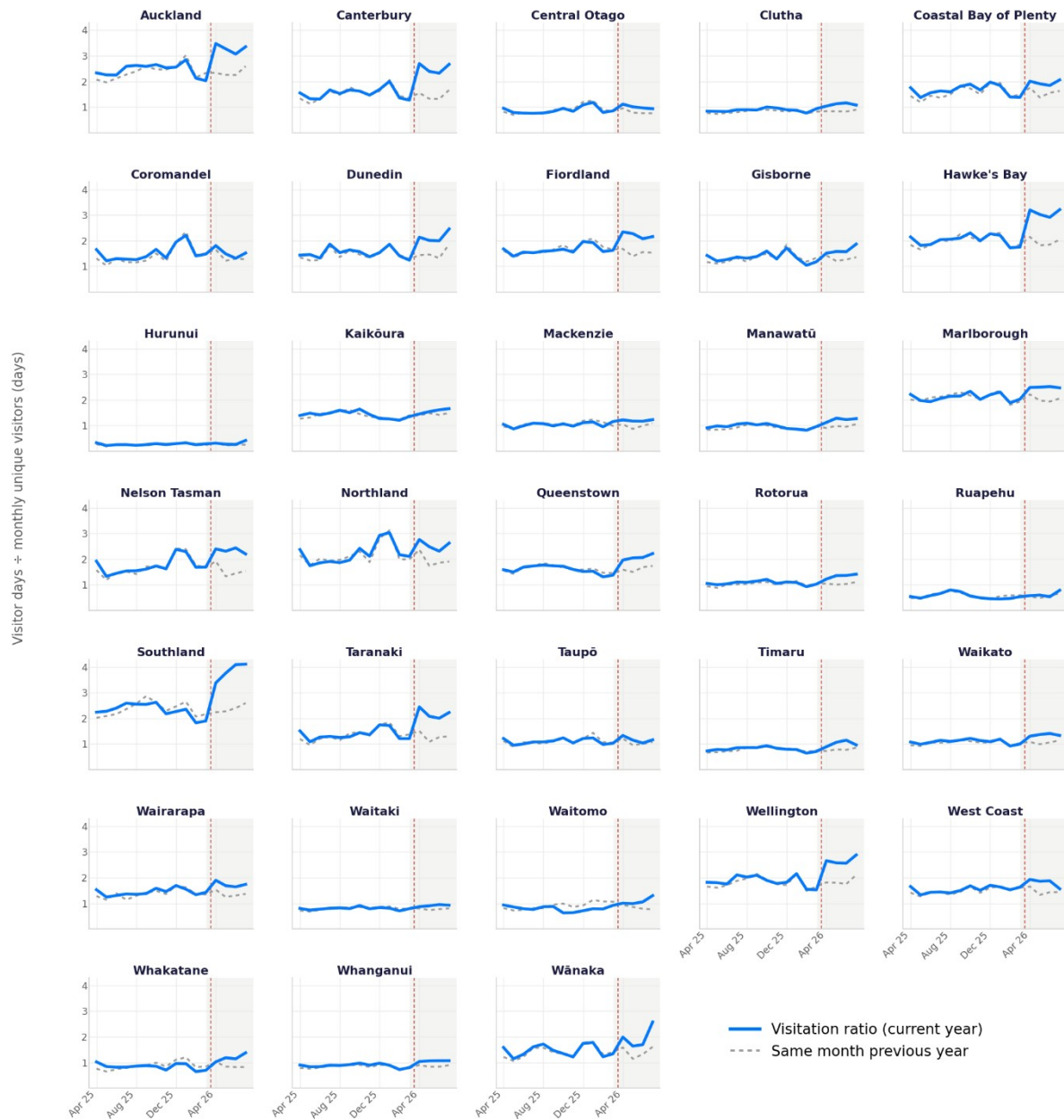


Figure 5. Domestic visitation ratio (visitor days ÷ monthly unique visitors) by RTO: current year (solid) versus the same month one year earlier (dotted). The ratio steps above its prior-year path at the feed change — reflecting the corrected (lower) unique counts — with the size of the departure varying by region.

International visitor counts: strong growth, corroborated

With the international components reinstated, most regions show international visitation trends consistent with expectations and with independent official statistics. Nationally, international visitation continued to grow over the period, including strong growth across the North Island and within the southern trans-Tasman ski market over winter.

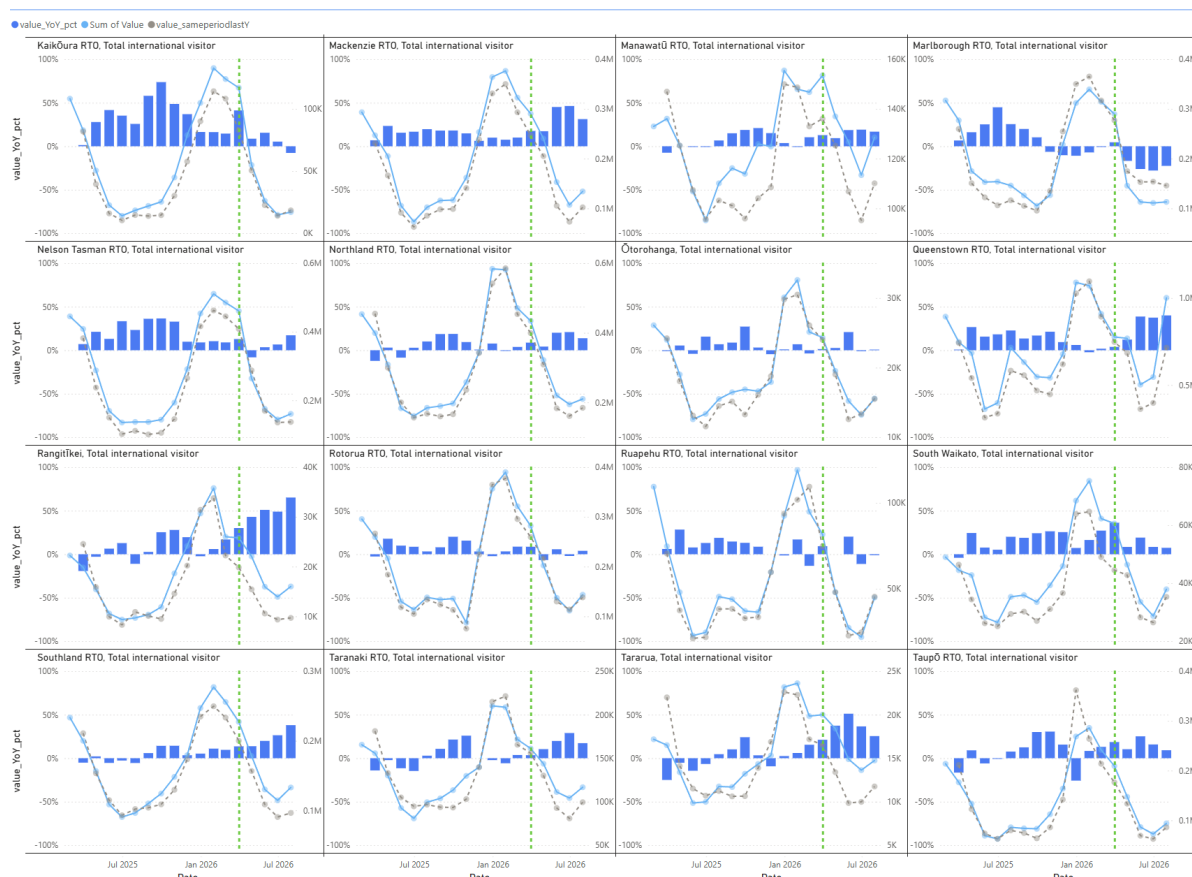


Figure 6. Total international visitors by RTO: monthly totals against the previous year, with year-on-year change (RTO level; snapshot of example regions).

Outputs across all markets have been assessed against other key benchmark data series and passed validation as being an accurate representation of on-the-ground dynamics.

Improved representation of returning international visitors

Outputs based on the revised methodology have also highlighted some historical inaccuracies – in particular in the treatment of repeat international visitors (for example, an Australian visitor returning for a second ski trip within five years). Under the previous methodology, such devices could be classified as quasi-resident on the basis that the device was first observed in the dataset more than 12 months earlier, rather than requiring the device to have been observed consistently for more than 365 days.

The result is that year-on-year increases are somewhat exaggerated for regions with a significant share of repeat visitation – growth that has been particularly strong given recent boost-funded campaign activity focused on the Australian market.

Regions showing notable movements

A small number of regions show larger movements than usual in this release. All were flagged in initial quality assurance and have been reviewed in depth. In each case the movement reflects a combination of genuine market change and the methodology improvements described above:

Region	Movement	What is behind it
Queenstown	Strong increase in international visitation	Genuine growth, corroborated by airport arrivals and transaction data; improved representation of repeat visitors adds to the measured increase.
Wānaka	Strong increase in international visitation	As for Queenstown; the region shares the same visitor market dynamics.
Coastal Bay of Plenty	Decline in international counts against a rising national trend	Severe weather events in early 2026 and associated disruption, with the sharpest decline aligned to the weather event itself; an unusually strong prior-year base; and potentially some residual methodology effects. The decline appears more pronounced in daily series than in monthly totals.
Gisborne	Larger than usual movements	Consistent with weather-related impacts and corroborated against benchmark datasets; the region's lower visitor counts also make it more sensitive to the improved low-end resolution.

Some of the most significant increases are reported in Queenstown and Wānaka. These have been further validated against independent sources: airport arrivals, spend/transaction data and other market-share indicators which align closely with the revised TVF results.

Stats NZ provisional border data shows international air arrivals into Queenstown Airport up approximately 18% for April to mid-August 2026 year-on-year, against national growth of around 2.5% – lifting Queenstown's share of national international air arrivals from around 14% to 16% across the window, and to nearly 20% at the peak of the winter season: likely a genuine gain in market share, led by Australian visitors.

Daily visitation in the TV&F series tracks these arrivals closely, with the ratio of the two remaining stable across the 1 April change point (Figures 8 and 9). Part of the measured increase also reflects the improved representation of repeat visitors under the updated length-of-stay segmentation; both effects act in the same direction.

Queenstown market share: international arrivals vs short-stay visitor days, April-July

The two measures move together in both years. The ratio of visitor-day share to arrivals share is essentially unchanged across the feed change (average 0.63 in 2025, 0.63 in 2026) — the reported share gain reflects genuine arrivals growth.

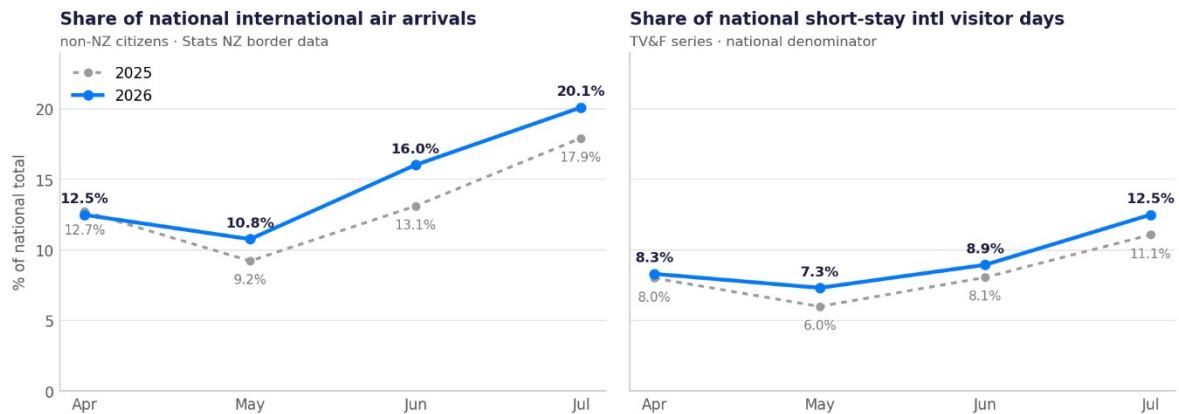


Figure 7. Queenstown market share: international arrivals versus short-stay visitor days, both as a share of the national total, April-July 2025 vs 2026. The ratio of the two shares is essentially unchanged across the feed change (0.63 in both years).

Queenstown's share of national short-stay international visitors — daily

Feb 2025 – Jul 2026. The share lifts at 1 April 2026, coinciding with the feed change — but also with Easter and the school holidays (3–6 Apr 2026 vs 18–21 Apr 2025) and a matching spike in ZQN arrivals. April monthly share: 8.3% vs 8.0% a year earlier.



Figure 8. Queenstown's share of national short-stay international visitors, daily, February 2025 – July 2026. The lift at 1 April 2026 coincides with Easter and the school holidays (3–6 April 2026, versus 18–21 April 2025) and a matching spike in Queenstown Airport arrivals; the April monthly share is 8.3% versus 8.0% a year earlier.

Daily peak visitor count per international border arrival

— Queenstown — New Zealand (all ports) daily, Mar-Jun 2026

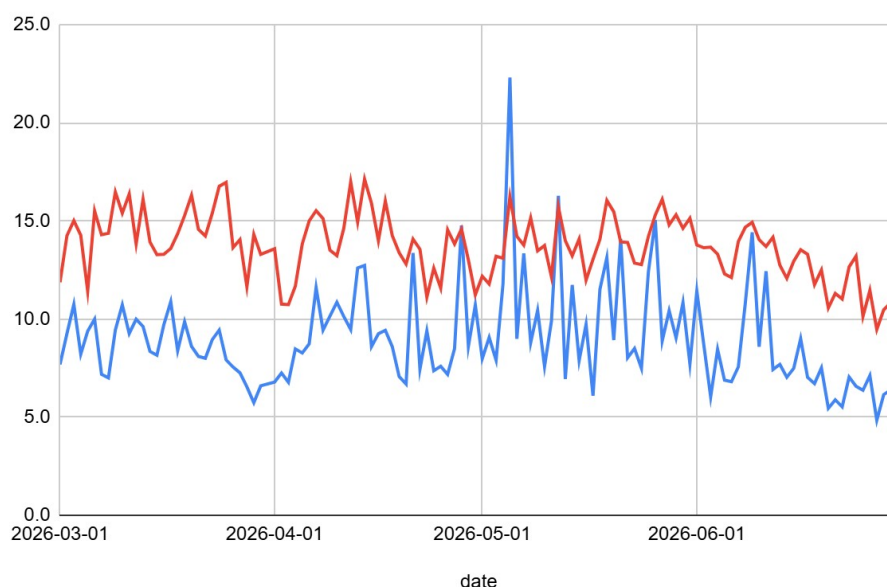


Figure 9. Daily peak visitor count per border arrival, Queenstown versus national. The stable ratio across 1 April 2026 indicates the reported increase reflects genuine arrivals growth rather than a measurement artefact.

For these regions in particular, users are advised not to interpret year-on-year changes that span 1 April 2026 as a pure measure of market movement.

Of the four regions above, Coastal Bay of Plenty shows the most pronounced downward movement, illustrated below. Monthly international visitation tracked well above the prior year through to March 2026 before falling below it from April onwards — a period in which the severe weather events, the strong prior-year base and the change point all coincide, which is why year-on-year figures for this region warrant particular care.

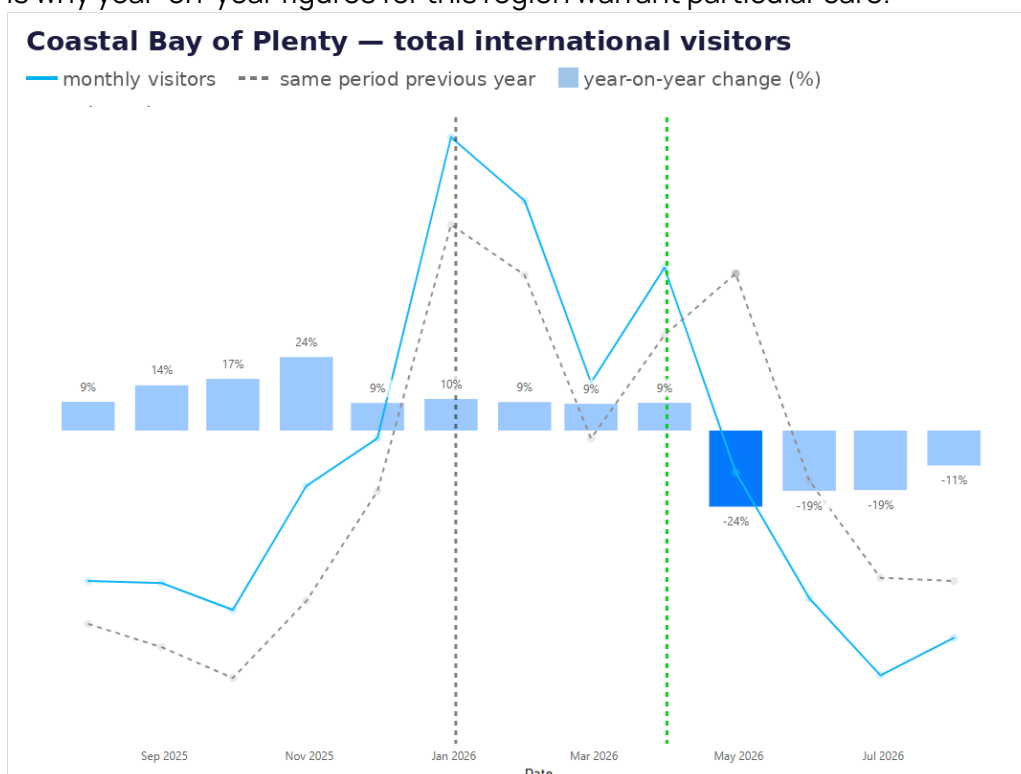


Figure 10. Coastal Bay of Plenty, total international visitors: monthly year-on-year change. Strong growth to March 2026 gives way to declines from April–May, coinciding with severe weather impacts and a strong prior-year base. As can be seen the temporal trend is broadly aligned with the prior year, but shows a marked shift downwards.

Regions with very low visitor counts

A handful of regions with very low overall visitor activity show strong apparent change in this release. This is an expected consequence of the increased resolution at the lower end of the value range: counts previously reported at a minimum reporting value are now resolved more precisely, which registers as artificially large year-on-year change in the smallest areas. These movements are a measurement improvement, not a change in visitation, and we recommend against citing year-on-year figures for very low-count areas in this release.

Visitor days by origin: a known issue for Southland origin

As previously communicated, quality assurance has identified an issue affecting the Visitor Days by Origin measure within the Flows series, in which some device home locations have been incorrectly assigned to the Southland region. This inflates reported visitor days from domestic visitors with a Southland home origin. The cause has been traced to a device assignment issue and a correction is being prepared; corrected values will be provided in an upcoming release and notified. In the interim, users should treat visitor-day estimates attributed to Southland-origin domestic visitors with caution. Other origin regions are not materially affected.

Time series continuity and user guidance

The updated feed applies from 1 April 2026 onwards. Values for earlier periods are unchanged from the previous release. In practical terms:

Comparison	Guidance
Within April 2026 onwards (e.g. April vs June 2026)	Valid – produced on a consistent basis.
Within periods before April 2026	Valid – unchanged from previous releases.
Spanning 1 April 2026 (e.g. year-on-year for April 2026 onwards)	Treat as indicative. Changes combine methodology improvements with genuine market movement. Apply particular care for domestic monthly unique visitor counts, for the regions listed above, and for very low-count areas. Do not calculate for Queenstown, Wānaka, Mackenzie, Gisborne and Coastal Bay of Plenty.
Very low-count areas	Avoid citing year-on-year change in this release.

We are investigating whether corrections to historical periods are appropriate – in particular for the monthly unique visitor count series, so that the full series can be used on a consistent basis. Users should expect that any further revisions will be smaller than the changes in this release, and all revisions will be notified in advance through the TEIC.

FAQs | Frequently Asked Questions

Q: Have values before April 2026 changed?

No. Values for periods before 1 April 2026 are unchanged from the previous release. The updated feed and methodology improvements apply from 1 April 2026 onwards.

Q: Domestic monthly unique visitor counts are lower from April 2026. Have visitor numbers fallen?

No. The lower counts reflect more accurate device classification: some local residents were previously misclassified as domestic visitors, overstating unique visitor counts. The updated counts better reflect actual visitation – local counts align more closely with the estimated resident population, and implied stay length aligns more closely with the first round of the Domestic Visitor Survey.

Q: Is the new data more or less accurate?

More accurate. The updated feed observes a larger and more representative device panel, filters non-personal devices more effectively, and resolves low counts with greater precision. Outputs have been benchmarked against independent official statistics, including airport arrivals and transaction data.

Q: Can I compare year-on-year?

Within the period from April 2026 onwards, yes – and within earlier periods, yes. Year-on-year comparisons for April 2026 onwards currently span the 1 April change point and should be treated as indicative, particularly for domestic monthly unique counts and the regions highlighted in this notice.

Q: Why do some small regions show very large changes?

The updated feed resolves low counts with greater precision. In areas with very low visitor activity this registers as artificially large year-on-year change. These movements reflect the measurement improvement, not a change in visitation.

Q: Queenstown and Wānaka show very strong international growth. Is that real?

Substantially, yes – although the magnitude reported in TV&F is somewhat exaggerated by under-reporting in previous periods. Independent border data shows international air arrivals into Queenstown Airport up approximately 18% year-on-year for April to mid-August 2026, against national growth of around 2.5%. Improved representation of repeat visitors under the updated methodology adds to the measured increase.

Q: Has privacy protection changed?

No. The same rounding and minimum-count privacy rules apply in the previous and updated feeds. This has been verified directly.

Q: Will there be further revisions?

Possibly. We are investigating whether corrections to historical periods are appropriate, in particular for the monthly unique visitor count series, and a correction to the Southland-origin visitor days issue is being prepared. Any revisions will be smaller than the changes in this release and will be notified in advance.