



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

Flows series | Visitor days by origin measure

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**People, Places
and Patterns**

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Introduction

For the February release, the Flows series within the Tourism Volumes & Flows (TV&F) insights series has been updated as part of continuous improvement to the estimation methodology. These updates strengthen the statistical foundations of the series by improving how attribution of visitor days by visitor origin are estimated from the underlying device observation panel.

This primer describes the changes that have been made, what users can expect to see in the updated data, and how to interpret any differences from the previous release.

 Note: These changes affect the breakdown of Visitor days by origin - the methodology used to model the headline monthly visitor days remains unchanged.

What Has Changed

1. More granular international market weighting

The model that converts device observations into visitor day estimates uses market-specific weight multipliers, derived from our international population model. Previously, some smaller international markets were grouped together for the purpose of calculating these weights:

- Germany was pooled into "Rest of Europe"
- Rest of the Americas was pooled into "Rest of World"

Both markets now receive their own independent weights. This means the visitor day estimates for these origin markets – and by extension, the broader market groups they belong to – are more accurately calibrated.

2. Simplified international market grouping

The published international origin markets have been consolidated from seven to six. "United Kingdom" and "Rest of Europe" have been combined into a single "Europe" market.

Previous	Updated
Australia	Australia
China, Japan & Korea	China, Japan & Korea
Rest of Asia	Rest of Asia
Rest of Europe	Europe
United Kingdom	(included in Europe)
Rest of World	Rest of World
USA & Canada	USA & Canada

This change improves statistical reliability and aligns market definitions with related datasets (MRTE, TECT, IVS), avoiding potential confusion from differing definitions of "Rest of Europe" across sources.

3. Updated quality filtering and raw data backfill

Quality filtering is used to narrow the raw data down to a panel of devices and associated observations considered representative of the underlying markets. Updates have been made to reflect changes in the accepted panel of devices and provide enhanced representativeness.

At the same time we have worked with our raw data provider to backfill data identified as missing from key dates in the Nov '25 - ' Jan '26 period, resulting in c.20% increase in raw data feeding the modelling for this period.

4. Suppression of small-area estimates

Visitor day by origin estimates are no longer published for areas without an active RTO, where device observation counts were found to be consistently too low to produce reliable market-level breakdowns. The 31 RTOs retained in the dataset all have sufficient device representation to support the published level of market detail.

Excluded areas: Horowhenua, Otorohanga, Rangitikei, South Waikato, Tararua, Waitomo, Waimate, Whakatane

Impact on estimates

Total visitor days: an overall decline, small uniform uplifts at RTO level

If values are summed across the entire series, totals will appear lower as results are now omitted for RTO areas without an active RTO. Users are reminded that summing results across RTO areas is not considered a valid analytical approach to the TV&F series due to risks of double counting. At an RTO level, uplift will be noted in line with the regular monthly updates to population model outputs. These are most pronounced for the international series with lesser increases for domestic totals.

Origin market shares: some shifts in international market composition

The primary impact of this methodology update is on **the distribution of visitor days across origin markets within each RTO**. Because the weighting is now more granular and the device sample broader, the estimated share attributed to each market has shifted for some regions. At the national level, these shifts are small, concentrated in the most recent 3 months of publication. Figure 2 represents these visually.

Market	Full period shift	Last 3 months shift
Rest of World	+1.0pp	+1.3pp
USA & Canada	+0.2pp	+1.2pp
Australia	+0.2pp	-0.3pp
Europe (combined)	-0.2pp	-3.4pp
Rest of Asia	-0.6pp	-0.8pp
China, Japan & Korea	-0.7pp	+1.9pp

RTO x Origin market combinations: Meaningful updates

At the RTO level, shifts can be larger - particularly for smaller RTOs where modest changes in the device sample produce more visible movements in market composition. These shifts reflect improved estimation rather than actual changes in visitor behaviour.

2 RTO areas have revisions to RTO x Origin market combinations of greater than 5 percentage points, with 12 having Moderate change (3–5 percentage points) and the remaining 17 RTOs show maximum shifts of between 1 and 3 percentage points. Across all, the most common pattern is a modest increase in Rest of World share with small offsetting movements across other markets. Figure 3 at the end of this section summarises the market share shift (in percentage points) for every published RTO x market combination in a visual heatmap.

Significant change (>5 percentage points)

Two RTOs show shifts of more than 5 percentage points in a single origin market. Both are driven by the Rest of World category, where the updated weighting of Rest of the Americas as an independent market substantially changes the estimated composition.

RTO	Key change	Detail
Wellington	Rest of World share decreases from approximately 30% to 17% (-12pp)	The previous methodology applied a pooled weight to Latin American devices that overstated this market's presence in Wellington. The reduction is redistributed across all other markets, with Rest of Asia, Europe, and Australia each gaining 2 to 4pp. Wellington's total visitor days are unaffected.
Hawke's Bay	Rest of World share increases from approximately 11% to 20% (+9pp)	The inverse of the Wellington effect; the updated weighting attributes more visitor days to Rest of World in Hawke's Bay, offset by small decreases in Australia and Rest of Asia.

Moderate change (3–5 percentage points)

Twelve RTOs show maximum single-market shifts of 3–5 percentage points. In most cases the largest shift is an increase in Rest of World share, reflecting the rebalanced Americas weighting. The remainder show shifts in Europe, China Japan & Korea, Australia, or USA & Canada driven by the broader sample and updated quality filtering

RTO	Largest shift
Waikato	Rest of World +4pp
Taranaki	Rest of World +4pp
Timaru	China, Japan & Korea -4pp
Kaikōura	USA & Canada +4pp
Southland	China, Japan & Korea -4pp
Ruapehu	Europe -4pp
West Coast	Europe +4pp
Rotorua	Rest of World +3pp
Coastal Bay of Plenty	Rest of World +3pp
Manawatū	Rest of World +3pp
Queenstown	Australia +3pp
Central Otago	Australia +3pp

Minor change (1–3 percentage points)

The remaining 17 RTOs show maximum shifts of between 1 and 3 percentage points. The most common pattern is a modest increase in Rest of World share with small offsetting movements across other markets. At this level, the changes are well within the normal range of variation for device-panel-based estimates and are unlikely to affect analytical conclusions.

This group includes: Auckland, Canterbury, Northland, Dunedin, Nelson Tasman, Marlborough, Coromandel, Taupō, Clutha, Fiordland, Hurunui, Gisborne, Wānaka, Wairarapa, Waitaki, Whanganui, and Mackenzie.

Time series continuity: Updates applied to historic data

The updated methodology has been applied consistently across the full time series (January 2024 onwards). There is no break point, splice, or discontinuity in the data. Year-on-year comparisons within the updated series are fully valid.

However, users should not compare the updated series directly against previously published figures for origin market breakdowns, as the methodological differences will appear as artificial shifts. Total visitor day comparisons with previous releases remain valid.

Supporting figures

Figure 2 shows the change in National origin market composition – full period (top) vs last 3 months (bottom). Note changes are concentrated in the most recent 3 months period.

Figure 2: National Origin Market Composition — Full Period vs Last 3 Months

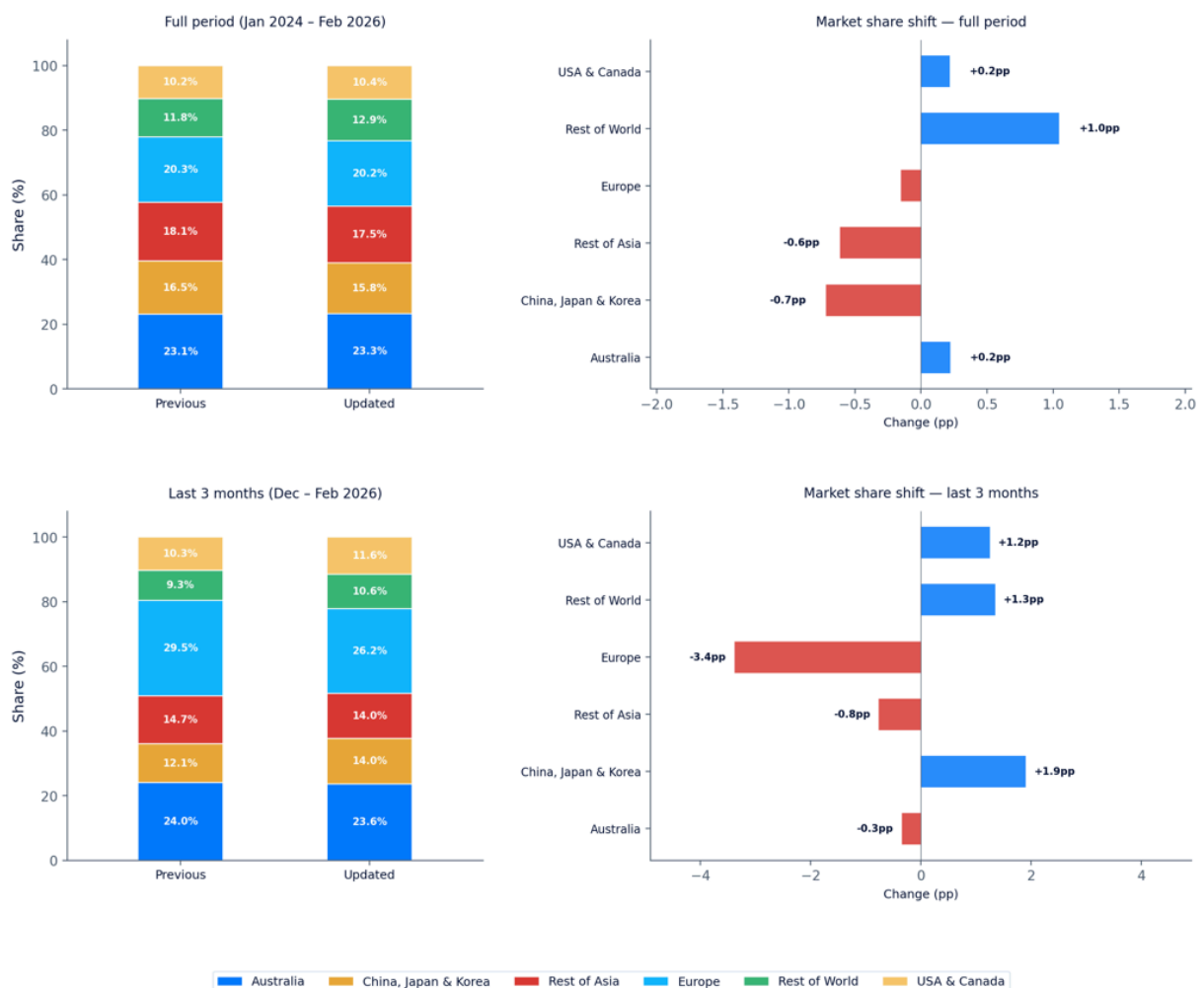


Figure 3 shows the market share shift (in percentage points) for every published RTO × market combination. Blue shading indicates an increase in that market's share; red indicates a decrease. RTOs are sorted by the magnitude of their largest shift, with the most affected at the bottom. The majority of cells show shifts of less than 3 percentage points.

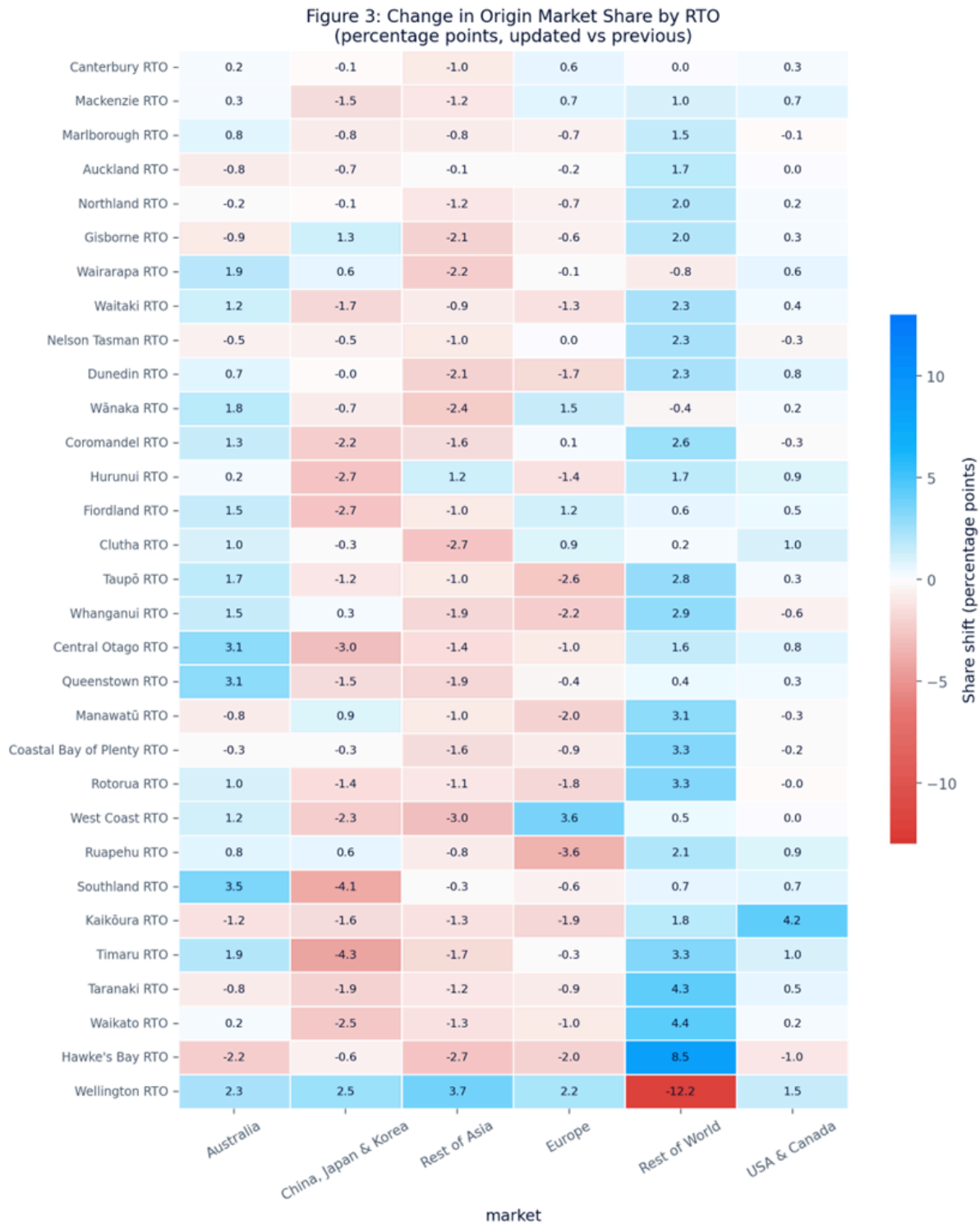


Figure 4 shows the Wellington RTO market composition change in detail. The Rest of World share decreases substantially (-12pp) and is redistributed across all other markets.

Note that Wellington's total visitor days are unaffected – only the attributed composition changes.

Figure 4: Wellington RTO — Origin Market Change



FAQs | Frequently Asked Questions

Q: Have the total visitor day numbers changed?

RTO level totals have changed only in line with the monthly revisions to the international population model. The methodology changes do not impact the total visitor day estimates.

Q: Why have market shares changed?

The distribution across origin markets has been refined. The updated weighting applies market-specific multipliers where previously some markets were pooled together.

Q: Is the new data more or less accurate?

More accurate. The broader sample and independent market weights reduce estimation bias.

Q: Why was Europe consolidated from two markets into one?

The combined category has a larger device sample (more stable estimates) and avoids confusion with differing "Rest of Europe" definitions in MRTE/TECT.

Q: Why were some geographic areas removed?

Estimation of Visitor days by Origin relies on highly granular samples of devices. In smaller areas these sample sizes were becoming too small to support reliable market-level estimates. To maintain publication consistency, these areas have been removed from the published outputs, in line with standard practice for tourism insights publications.

Q: Can I compare year-on-year within the updated series?

Yes. The methodology is applied consistently across all months.

Q: Can I compare with previously published figures?

For origin market breakdowns, no. The revised outputs should be used as the basis for all historic comparisons. Total visitor day comparisons with previous releases remain valid.