

COMMUNITY SENTIMENT

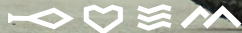
SURVEY INSIGHTS // 2025

CEDA

CENTRAL ECONOMIC
DEVELOPMENT AGENCY

TE MAURI O

MANAWATŪ



HOW OUR LOCALS VIEW OUR VISITOR INDUSTRY

Since 2021, CEDA has undertaken regular community sentiment surveys to gauge local sentiment toward the visitor sector, and to ensure we have robust, community-grounded insights informing the Manawātū Destination Management Plan (DMP). Understanding local perceptions on the value of the visitor industry in our region ensures we can work together to sustainably grow visitor activity and value for the benefit of our community.

In the year to June 2025, the Manawātū visitor economy was worth over \$340 million to the region – with international traveller value up 6.7% compared to 2024. Out of 31 regions in New Zealand that have a dedicated Regional Tourism Organisation, like CEDA, Manawātū ranks 13th for total visitor spend.

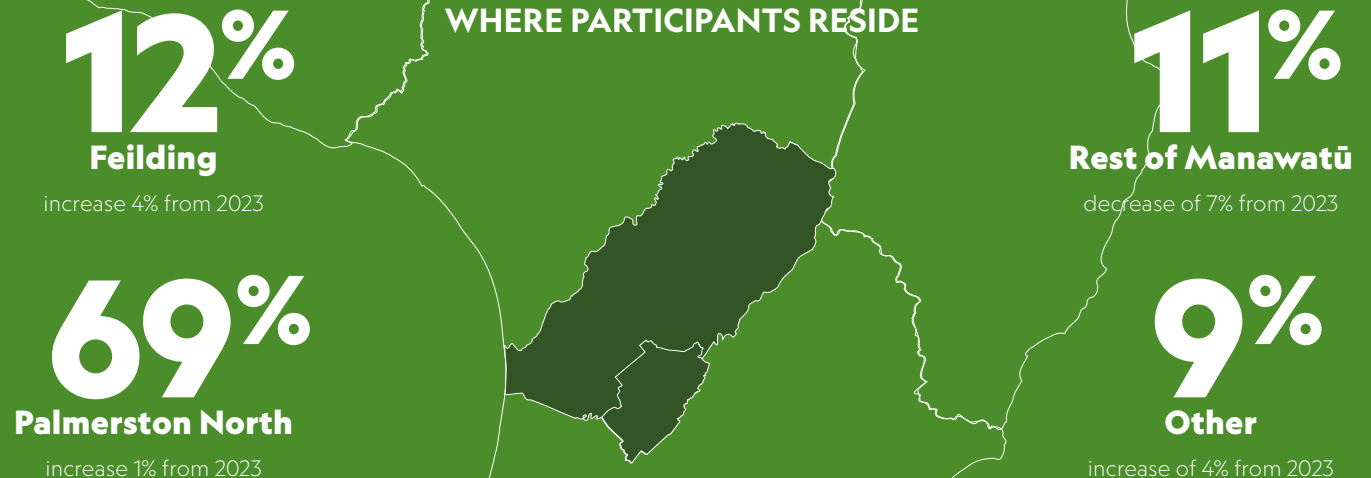
Domestic and international visitors support local businesses, create jobs, and add vibrancy to our city and region. Whether they're here for events, sports, business, retail therapy, to visit with friends and whānau, or to

explore our stunning outdoors, their impact is felt across accommodation, hospitality, arts, retail, and recreation. By engaging our community, we can better understand how locals feel about visitation in our region, allowing us to align our marketing and business support strategies to bring even more economic activity to the region, and help measure the ongoing impact of the Manawātū DMP.

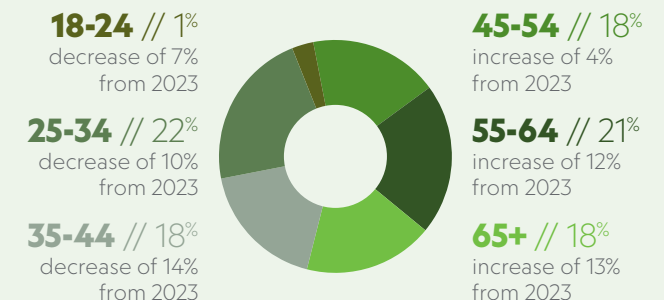
The feedback received through this survey process informs how we market Manawātū, support local businesses, and grow the value visitors bring – all while enhancing quality of life for residents.

Here's our community's thoughts.

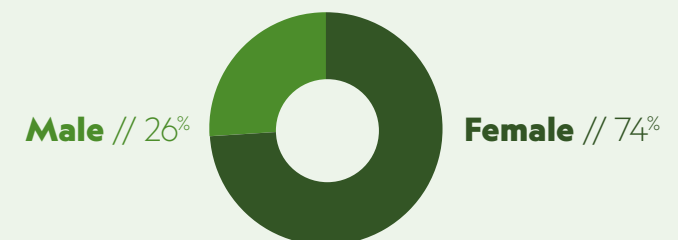
WHERE PARTICIPANTS RESIDE



AGE RANGE OF PARTICIPANTS



GENDER



Respondents were given the option to self-select from the following options: *Female, Male, Prefer Not to Say, and Prefer to Self-Describe.*



86%

of people believe the visitor sector is an important industry in Manawatū.

compared with 77% in 2023



87%

agree that the visitor industry has a positive impact on Manawatū.

compared with 81% in 2023



62%

know about the [ManawatuNZ.co.nz](https://www.ManawatuNZ.co.nz) regional website

compared with 53% in 2023



76%

believe the visitor sector provides good employment opportunities in Manawatū.

compared with 72% in 2023



81%

support local tourism businesses in the short to medium term.

compared with 75% in 2023



77%

would actively encourage friends and family to come visit.

compared with 68% in 2023

WHO DID WE SURVEY?

CEDA's community sentiment survey was distributed via a boosted Facebook promotion and by way of CEDA's extensive electronic direct mail databases over a period of several weeks. We heard the voices of 337 locals – a significant increase of nearly 15% from 2023 – improving precision in our results. The survey also achieved a broader district reach this year, notably Feilding up 12% from 8% in 2023, while Palmerston North remained the core base at 69% vs 68% in 2023. These results give us confidence that the insights here reflect both city and district perspectives.

The survey was distributed between 8th July and 4th August. Undertaking the survey during winter months – as opposed to in Autumn in previous years – can impact the comments and sentiments felt by participants, largely due to weather conditions, the events calendar at this time of year, and cost-of-living increases experienced at these times across the country. Despite these environmental impacts, the results are still overwhelmingly positive.

TOURISM INITIATIVES

WHEN ASKED IF THEY HAD HEARD OF ANY TOURISM INITIATIVES IN MANAWATŪ, THE MAJORITY (53%) OF RESPONDENTS SAID YES.

This is a positive increase from 49% in 2023. Common themes of initiatives respondents had seen were around outdoor experiences like our walkways, cycle trails, Te Āpiti - Manawatū Gorge track, mountain bike tracks and glamping. Others noted large events at the Arena, Manfeild and The Regent as standing out to them along with relatively new festivals such as Salud and Sip & Savour.

Tourism promotional initiatives which stood out were social media videos and advertising promotions including the "Wait. What?" Local Advocacy Campaign, which CEDA undertook in 2025. This is a positive result as the primary audience for this campaign was locals, indicating the current marketing channels are reaching the desired market.

TAKING THE GOOD WITH THE BAD

When considering community sentiment, it is important to hear the good along with the bad. We asked locals why they think people choose not to visit Manawatū. Through this anecdotal feedback we see the most common theme was a perception that Manawatū is boring with no major attractions or drawcards. Some locals cited the environment as being a reason people choose not to visit either due to poor weather or a lack of naturally occurring activities in the city such as a beach. The most notable feedback within this section was that despite a poor reputation, this feels like a hangover that is fading. Respondents can see a positive shift, slowly but surely, away from this negative perception and many believe that if people experienced the region firsthand, those old misconceptions would disappear entirely.

When a region is proud of what they have to offer, visitors feel it too.

TOP FIVE REASONS PEOPLE VISIT MANAWATŪ // ACCORDING TO LOCALS

The top five remains unchanged from 2023.



71%

VISITING FAMILY AND FRIENDS

compared with 78% in 2023



55%

CONFERENCES AND BUSINESS

compared with 54% in 2023



47%

SPORTING EVENTS

compared with 46% in 2023



46%

EDUCATION

compared with 49% in 2023



41%

FESTIVALS OR EVENTS

compared with 38% in 2023



35%

WALKING, TRAMPING, HIKING

compared with 7.6% in 2023

Another notable change was the rise in locals who view walking, tramping, and hiking as a major drawcard for visitors. This year, 35% of respondents identified these outdoor activities as a key reason to visit Manawatū, a significant increase from just 7.6% in 2023.

MANAWATŪ

MUST DOS // FOR VISITORS

OUR OWN COMMUNITY ARE OUR GREATEST ADVOCATES FOR OUR REGION.

We asked respondents to share with us their 'must do' activities for visitors. Many responses discussed the great outdoors, events, motor racing and places of interest. A visit to Victoria Esplanade and a walk or cycle along the Manawatū River to He Ara Kotahi continues to be the most popular activity that locals recommend along with other family-friendly parks and activities. Our residents praise our hospitality sector, with recommendations for bars, restaurants and cafes right across the region coming in strongly. Sightseeing, hiking and bushwalking at Te Āpiti - Manawatū Gorge, mountain biking and visiting our beaches got glowing reviews and were mentioned with pride by our survey participants. Perhaps the biggest changes were the increase in recommendations for shopping, particularly at The Plaza, as well as arts and cultural activities such as visiting one of our museums, watching a quality show at a theatre or feeding the Urban Eels.

"Manawatū River Walk & Victoria Esplanade. Discover the shopping and culinarily experiences offered with in the region events (always something on)."

"Visit a ton of trails and hiking areas around the region. ManawatūNZ is a great site for information on that, if it's summertime... the river loop down at Foxton is perfect for people especially with kids or plenty of horse-riding activities and farm experiences to do."

"Tour the small villages, visiting the cafes and seeing the countryside. Sledge track and the glow worm caves. Visit the beaches."

"Rangiwahia hut, farm experience in some form see sheep, Pohangina glow worms, often things on at The Globe."

"Spend a day following the art trails, and enjoy local cafes along the way. Enjoy the gorge, scenery history. Stay & relax at a gorgeous rural retreat and perhaps enjoy a ride on the Rangitikei River."

"Visit the beaches/fishing; tramping/ hiking; rural cafes/pubs for meals (small kiwi town experience). Horse races - this is something that could be explored more - a cheap family day out when there is no entry fee and activities for kids."

LOCALS' VIEW ON INDUSTRY AND VISITORS



We asked a series of questions around how locals felt about welcoming visitors into our region, including if they would actively encourage friends and family to visit Manawatū.

The majority of respondents (77%) said they would actively encourage friends and family living outside of Manawatū to come and visit. Only 10% said they wouldn't, while 13% were unsure. The biggest barrier for those that said no or maybe was that they weren't sure what they would do with their visitors when they got here.

This year's survey has solidified our communities' support of both domestic and international visitors to our region. In 2025, 88.9% of locals were comfortable with domestic visitors, a slight decrease from 90% in 2023 but relatively stable given the larger pool of respondents. Our community are also happy to welcome international visitors to our region, with 86% of locals comfortable with this market increasing, compared with 91% in 2023. The majority of those who had reservations about visitors to the region were concerned with infrastructure including accommodation options, parking and traffic in the region.

LOCALS' VIEW ON GROWING VISITORS TO THE REGION



89%

of locals are comfortable with growing the number of domestic visitors to Manawatū.

Compared with 90% in 2023

86%

of locals are comfortable with growing the number of international visitors to Manawatū.

Compared with 91% in 2023

GROWTH OF OUR VISITOR INDUSTRY



Through this survey, we have been able to get insights into our locals' thoughts on the growth of our visitor industry. The majority (59%) of participants have no concerns about this industry's growth, however, 12% of participants have concerns and 29% were unsure on the matter. Concerns centred around infrastructure including accommodation options, parking and traffic in the region, as well as external perceptions of the region.

Here were some of their concerns:

"My main concern is the lack of parking."

"Lack of infrastructure and quality accommodation."

"Lack of positive visibility nationally and internationally. Perception of the lack of fun things to do here."

When we asked people how we can make Manawātū an even better destination for visitors, we noticed a few recurring themes. Some ideas echoed what we have heard in previous years, while others brought fresh perspectives to the table. Anecdotal feedback focused on infrastructure upgrades including more parking, improved roading and painting of CBD buildings and shops. Others focused on enhanced vibrancy by attracting more events to the region and seeking further investment from big businesses.

"More celebration of arts and culture! We do so many cool things that so many people wouldn't even know about."

"More shops and better shops. More events. Better events."

"More beautiful places to share meals, eateries with views where you can stroll around a place with energy."

"A better night life. Maybe a night market in the square. Climbing wall. A river market on Sundays."

"Build a unique character by developing events, locations and attractions that contribute to this."

"Fresher, more vibrant and fun looking city. Better maintained buildings and more gardens around the city streets. Better parking. Bigger marketing drive showcasing all that the area has to offer."

"Create festivals and concerts in Palmy or other big events to draw people here, especially young peoples events as they will be more likely to return if they have a good time."



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