Still in sight

The New Zealand Global Talent Report Q4 2025 – Q1 2026

A comparative analysis of global talent perception, interest, and barriers across two survey waves, drawing on 4,106 respondents from 138 countries.

Forward

A word before we begin

Talent moves when the moment is right. Sometimes that moment is shaped by opportunity: a better role, a clearer pathway, a company willing to back someone they believe in. Sometimes it is shaped by something larger, a sense that the world at home has changed in ways that make staying feel less certain than it once did. Often, it is both at once.

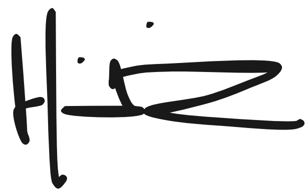
Still in Sight began as a straightforward question: how does the world's talent actually perceive New Zealand as a place to live and work? Not how New Zealand hopes it is perceived, or how it is marketed to be perceived, but how it genuinely registers in the minds of professionals in the United States, India, the Philippines, Germany, South Africa, and over a hundred other countries, when they think honestly about their options.

The first wave of the survey, conducted in Q4 2025, gave us a baseline. More than 1,300 responses from 114 countries. A picture of New Zealand seen from the outside: its strengths, its gaps, its reputation, and the barriers that sit between aspiration and action. We published the initial findings, shared them with employers and policymakers, and began the conversations that good data should start.

The second wave, completed in Q1 2026, gave us something more valuable still: a comparison. With more than 2,800 responses from 138 countries, we could begin to ask not just 'what do people think?' but 'what has changed, and why?' The answer, explored in detail across the eleven chapters that follow, is that quite a lot has changed. And the direction of travel, for New Zealand, is encouraging.

This report is designed to be read by people who make decisions. Not necessarily data specialists, though the analytical rigour is there for those who want it. The goal is a document that a Chief Executive, a Minister, or a Head of Talent can read and come away from with a clear sense of where New Zealand stands in the global talent marketplace, and what to do about it.

Two waves of data is the beginning of a story, not the end of one. We look forward to the next chapter.



Hamish Price CEO
Haines
Auckland & Wellington, May 2026

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Executive summary

The view from here

New Zealand has a talent problem, though perhaps not the one you might expect. The problem is not that the world's professionals don't want to come. They do. Across two waves of the Still in Sight survey, conducted in Q4 2025 and Q1 2026, nearly 93% of 4,106 respondents from 138 countries expressed genuine interest in living and working in New Zealand. The problem is that interest is not translating into arrival at the rate the country needs.

This executive summary distils the key findings from the report into the six things that matter most for anyone working to attract international talent to New Zealand. The chapters that follow provide the evidence, the cross-tabulations, and the analytical depth. This section provides the conclusion.

Finding 1

The mood is shifting, and shifting fast

The headline finding of the Q1 2026 wave is an acceleration in positive sentiment toward New Zealand. Net favourable perception rose from 49.9% in Q4 2025 to 58.7% in Q1 2026, an 8.8-percentage-point increase in a single cycle. Net negative perception more than halved, from 17.1% to 8.9%. Career opportunity confidence also improved, with the proportion rating NZ opportunities as 'strong' or 'very strong' rising from 40.0% to 46.4%.

This is not marginal drift. These are meaningful movements that point to a genuine shift in how globally mobile professionals are thinking about New Zealand as a destination. The external context (particularly the political turbulence in the United States and the global search for stability) is amplifying New Zealand's natural advantages at an unusually favourable moment.

> Net favourable perception rose from 49.9% to 58.7%. Net negative perception more than halved. The direction of travel is unambiguous.

Finding 2

The United States is the story of this wave

American respondents grew by 151% between waves, from 187 to 470. Their positive perception of New Zealand rose from 33.7% to 50.0%. Their 'very interested' rate jumped from 47.6% to 59.4%. In Q4 2025, Americans were the most equivocal large market in the survey. By Q1 2026, they had moved decisively into the positive category.

The forces driving this shift (political instability, social polarisation, and a desire for a fundamentally different way of life) are structural rather than cyclical. New Zealand's response should be proportionate: targeted eligibility communications, active employer recruitment in US markets, and investment in the peer networks that make the proposition credible to an audience that trusts people over institutions.

> American respondents grew 2.5x between waves. No other large market showed comparable sentiment movement. The window is open, for now.

Finding 3

The visa system remains the singlebiggest obstacle

Across every market and every sector, visa and immigration complexity is the most commonly cited concern. In Q1 2026, 54.3% of respondents cited visa complexity as a top-three worry, and a further 38.4% cited uncertainty about their own eligibility. These are not the same problem. Complexity is a process issue. Eligibility uncertainty is a communication issue, one that can be addressed without waiting for policy reform.

The August 2026 changes to the Skilled Migrant Category create two new, more accessible residence pathways. The data suggests that awareness of these changes has not yet reached the international audiences they are designed to reassure. Closing that communication gap is an immediate priority.

> 38% of respondents don’t know if they’d even qualify for a New Zealand visa. That is not a policy problem. It is a communication problem and it is solvable today.

Finding 4

97% would consider working remotely for a New Zealand employer first

The single most surprising and actionable new finding in Q1 2026 is the near-universal openness to remote work as a precursor to physical relocation. 83.6% said yes outright; a further 13.7% said maybe. Only 2.7% said no. This appetite is consistent across all major markets and sectors.

This finding represents an untapped pipeline of significant scale. It suggests that the population willing to engage with New Zealand employers is far larger than the population willing to relocate immediately. A deliberate remote-first talent programme (with employer accreditation, clear visa progression, and active international outreach) could create a warmer, more committed talent pipeline than any traditional attraction campaign.

> 97% open to working remotely for a New Zealand employer before relocating. The pipeline already exists. New Zealand just hasn't built the programme around it yet.

Finding 5

Australia is the competition. Always.

When asked which other countries they are considering alongside New Zealand, 51.1% of respondents named Australia. Canada came second at 38.6%. These two countries dominate the consideration set across virtually every market. New Zealand is almost never being evaluated in isolation. It is being compared, constantly, to a close neighbour with a larger economy and higher average salaries.

The competitive response is not to out-Australia Australia. It is to be clearly, convincingly different. Smaller. Warmer. More balanced. More genuine. The data shows that New Zealand already wins on lifestyle, work-life balance, and cultural character. The task is to make those differences feel tangible and real to someone sitting in Mumbai or Houston, not just someone who has already been to Queenstown.

Finding 6

The message is already written. Listen to it

The most-used word to describe working in New Zealand, across thousands of free-text responses, is ‘balance’. The top three open-ended themes (what talent says New Zealand should do differently) are: simplify the visa, show us the jobs, and open the remote door. These are not new recommendations invented by consultants. They are the direct words of the people New Zealand is trying to attract.

And there is a fourth message, written not in open-ended responses but in the regional awareness data. One in five internationally mobile professionals interested in New Zealand cannot name a single part of it. That number has not moved in a year, even as overall interest has grown significantly. Respondents who are familiar with four or more regions of New Zealand are 16 percentage points more likely to say they are very interested in moving than those who know no regions at all. Regional storytelling is not just good for the regions. It is a national talent attraction lever, and it is almost entirely untapped.

The opportunity cost of ignoring all of this is high. The cost of acting on it is lower than many assume. Immigration communication is not a policy change, it is a messaging decision. Employer visibility is not a structural reform, it is an outreach programme. Regional storytelling does not require a government programme, it requires employers and regions to show up where the audience already is. The work is known. The question is whether the will is there to do it.

The eleven chapters of this report provide the evidence behind each of these findings, the cross-tabulations that reveal how they vary by market and sector, and the analytical context (both from the survey data and from external sources) that explains why the numbers look the way they do. What the data cannot do on its own is act. That part is up to the people reading this.

Summary of key metrics

Key Metric	Q4 2025	Q1 2026	Change	Reference
Favourable perception (net)	49.90%	58.70%	+8.8pp	Chapter 3
Career confidence (strong/very strong)	40.00%	46.40%	+6.4pp	Chapter 3
Interest (interested or more)	89.20%	93.00%	+3.9pp	Chapter 3
US respondents: Very interested	47.60%	59.40%	+11.8pp	Chapter 8
Visa/immigration concern	63.20%	54.30%*	-8.9pp*	Chapter 7
Cost of living concern	51.00%	51.40%	+0.4pp	Chapter 7
Open to remote work before relocation	-	97.30%	New	Chapter 10
Australia cited as competitor	-	51.10%	New	Chapter 10

*The visa concern question was split into two items in Q1 2026 (‘Visa complexity/process’ at 54.3% and ‘Uncertainty about eligibility’ at 38.4%). Direct wave-on-wave comparison is not statistically valid; treat the apparent decline with caution.

Chapter 1
About this research

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1.1 Survey design and methodology

Still in Sight is an ongoing pulse survey designed to measure how global talent perceives New Zealand as a place to live and work, and critically whether that perception is shifting. It is not an academic exercise. It is a practical intelligence tool: built to help those working to attract international talent to New Zealand understand what is working, what is not, and where the conversations need to happen.

The survey is deliberately concise. Ten to fifteen questions, most of them structured multiple-choice, covering the things that actually matter in a relocation decision: how people feel about New Zealand right now, what they find attractive, what makes them hesitant, how serious their interest is, and what steps, if any, they have already taken. A short open-ended question at the end invites respondents to share, in their own words, what New Zealand could do better.

Two waves of data collection have now been completed. The first ran through Q4 2025, gathering responses across a broad international audience. The second wave launched in late March 2026 and closed in April 2026, with a refined question set that introduced two new items: one on remote work as a pathway to relocation, and one asking which other countries respondents are currently considering. Together, these two waves allow us to begin tracking directional change, with the appropriate caveat that two data points establish a trend only in the loosest sense of the word. They are, however, a meaningful start.

> Two data points do not make a definitive trend. But they do tell us which way the wind is blowing. Right now, it is blowing toward New Zealand.

1.2 Sample sizes and respondent profiles

The growth in participation between the two waves is, in itself, a finding worth noting. The Q4 2025 survey attracted 1,310 total responses. The Q1 2026 survey attracted 2,814, more than double. After excluding respondents who identified as New Zealand nationals, the analytical sample stands at 1,300 respondents for Q4 2025 and 2,806 for Q1 2026.

This growth matters for two reasons. First, it improves the statistical robustness of the Q1 2026 data: subgroup analyses by country and sector carry more weight when the underlying sample is larger. Second, the growth itself is indicative of appetite. More people engaged, from more places, in a shorter window of time. That does not happen by accident.

In terms of geography, respondents came from 114 countries in Q4 2025, rising to 138 countries in Q1 2026. The top markets by volume (the United States, India, the Philippines, Germany, the United Kingdom, and South Africa) remained consistent across both waves, though their relative weights shifted in ways explored in detail in Chapter 5. By sector, respondents were dominated by Technology and Engineering professionals across both waves, with the remainder spread across Manufacturing, Finance, Healthcare, Education, Government, and other fields. Full country and sector breakdowns, with wave-on-wave comparisons, are presented in Chapter 5.

Table 1.1 – Survey participation by wave

Wave	Total responses	Analytical sample (excl. New Zealand nationals)	Countries represented
Q4 2025	1,310	1,300	114
Q1 2026	2,814	2,806	138

1.3 How to read this report

This report is structured to be read from front to back, but it has also been written so that individual chapters stand on their own. Readers who want the top-line story will find it in Chapters 3 and 11. Those who want to understand what is happening in a specific market (the United States, for instance, or the Technology sector) should head straight to Chapters 8 and 7 respectively.

Throughout the report, percentages are rounded to one decimal place. Where wave-on-wave comparisons are made, we have been careful to note any differences in question wording or response options that might affect direct comparability. Two questions were added in Q1 2026 (on remote work openness and competing destinations) and are therefore reported in isolation without prior-wave comparison.

Where the data presents an interesting pattern, such as a particular country group reacting differently or a sector bucking a trend, we have done our best to contextualise that finding against what was happening in the world at the time. These interpretations are clearly labelled as analytical inference, not additional data. They are offered as a starting point for thinking, not as conclusions.

1.4 A note on comparability between waves

Readers should be aware of three methodological considerations when comparing Q4 2025 and Q1 2026 data.

Sample size difference. The Q1 2026 sample is more than twice the size of Q4 2025. This means percentage-based comparisons are valid, but absolute number comparisons should be made with caution. Where we present counts rather than proportions, we have noted this explicitly.

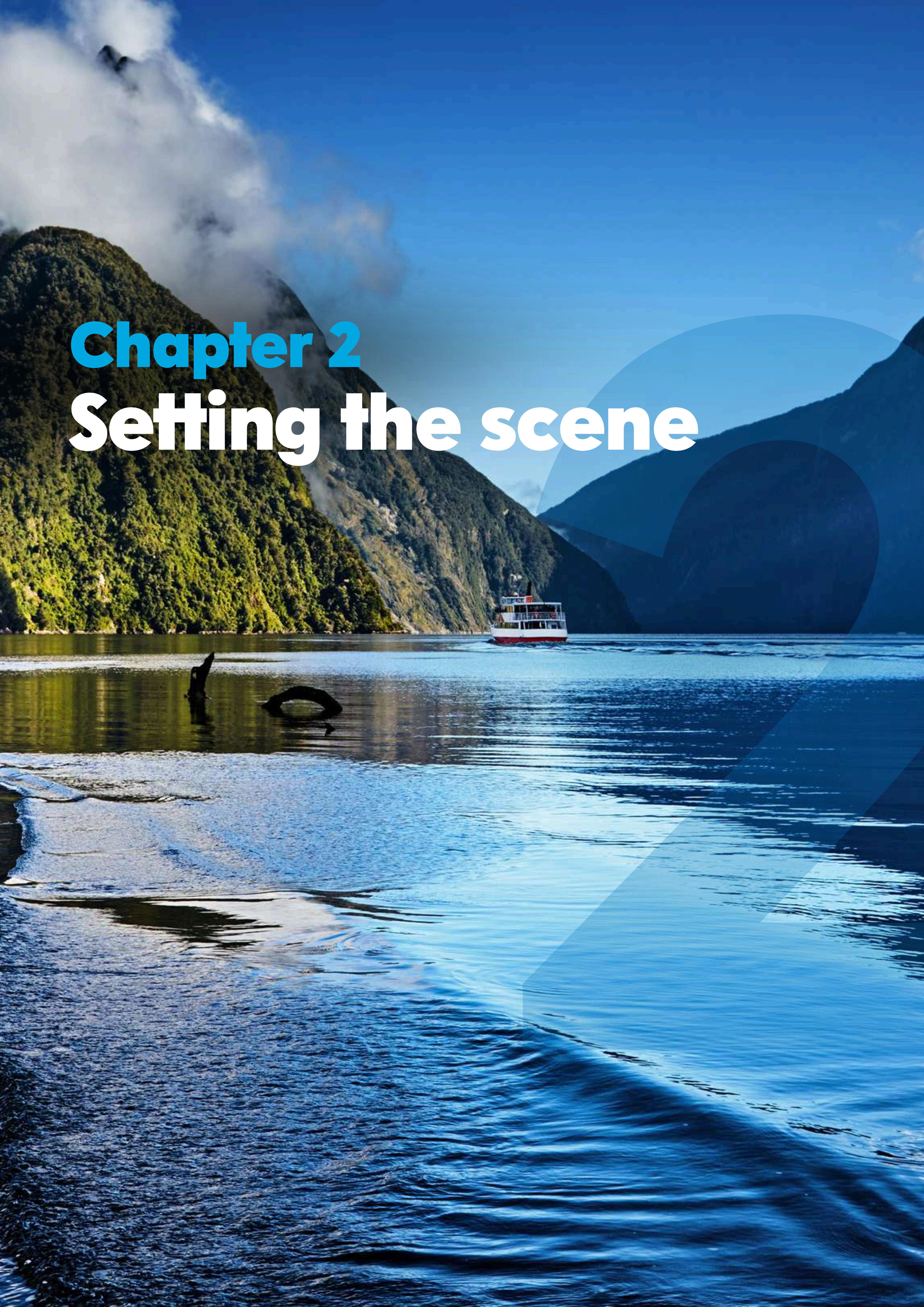
Question evolution. The core question set is consistent across both waves, allowing direct comparison on perception, opportunity rating, excitement drivers, barriers, interest level, and action taken. Two new questions appear only in Q1 2026: willingness to work remotely for a New Zealand employer, and which competing destinations respondents are considering. These are analysed in Chapter 9 without prior-wave comparisons.

Concern category relabelling. One barrier category was reworded between waves. In Q4 2025, this was listed as "Visa & immigration process". In Q1 2026, it was split into two distinct items: "Visa complexity/process" and "Uncertainty about eligibility". When comparing wave-on-wave barrier data, we have combined these two Q1 2026 items for like-for-like comparison with the Q4 2025 figure and noted where we do so.

> The question set was deliberately kept stable between waves. What changed is the world the respondents are living in and that context matters as much as the numbers themselves.

With the methodology clearly framed, we turn next to that world: the global forces shaping talent mobility in 2025 and 2026, and the particular moment in which New Zealand finds itself.

Chapter 2
Setting the scene



Chapter 2
Setting the scene

Survey data does not exist in a vacuum. When people tell us their perception of New Zealand has improved, or that they are now more seriously considering a move, we need to ask what happened in the world around them to move the needle. Numbers without context are just numbers. Numbers in context become insight.

This chapter sets the stage for everything that follows. It covers three interconnected forces that defined the backdrop against which both waves of the Still in Sight survey were conducted: the shifting dynamics of global talent mobility, the geopolitical and economic turbulence reshaping where and why people consider moving, and New Zealand's own policy evolution as it works to position itself as a destination worth choosing.

2.1 A world in motion, slowly

Global talent mobility has not followed a straight line in the years since the pandemic. After an initial surge in cross-border movement driven by pent-up demand, the trajectory has become more complex. According to research published by Boston Consulting Group and the Center for Global Development in late 2025, the movement of highly skilled professionals across borders actually declined by 8.5 percent year-on-year as of August 2025, roughly 220,000 fewer people on the move from a tracked pool of 214 million. It was the first such decline since 2020.

But a declining headline does not tell the whole story. What BCG and CGD found beneath that number was a significant redistribution of talent flows: not less movement, but movement toward different destinations. The Gulf states, for example, had a standout year. The UAE attracted close to 178,000 highly skilled professionals in 2025, placing it among the top three global destinations for STEM and AI talent. Meanwhile, Canada and the United Kingdom (historically reliable magnets for mobile professionals) watched their market share erode.

The 2026 Worldwide Immigration Trends Report from Fragomen added further texture: global demand for skilled workers remains structurally high, with 74 percent of employers worldwide reporting difficulty finding the talent they need in 2025, double the rate of a decade earlier. The world is not short of ambition to move. What it is short of is clear, accessible, affordable pathways to do so. That context matters enormously when we look at the barriers New Zealand faces.

> Talent is still moving. The question is no longer whether people want to relocate. It is whether the destination makes it easy enough to be worth the leap.

2.2 The geopolitical and economic backdrop

Three forces in particular shaped the global mood during the period covered by this research. Each of them has a direct bearing on how our respondents answered, and why certain markets moved in the ways they did.

The United States: A country reconsidered

Perhaps the most consequential single factor in the data is what has been happening inside the United States. The return of Donald Trump to the White House in early 2025 triggered a chain reaction that has made international mobility a live question for a swath of American professionals in a way it simply was not before.

The data paints a striking picture. According to calculations from the Brookings Institution, net migration in the United States turned negative in 2025 for the first time since 1935. More people moved out of the country than moved in. A Gallup poll tracking the proportion of Americans who say they want to leave had already risen from 17 percent in 2023 to 21 percent in 2024, ahead of the election result. Post-inauguration, immigration advisers and tax lawyers reported a surge in enquiries from Americans seeking help with the legal and financial mechanics of an international move.

The destinations attracting the most attention from departing Americans skew heavily toward English-speaking and politically stable countries. Ireland, Canada, Portugal, and the UK all featured prominently in media and migration data. New Zealand, by virtue of its language, legal tradition, safety reputation, and crucially its distance from the centres of political volatility, is increasingly in that conversation. The doubling of American respondents in our survey between Q4 2025 and Q1 2026 is not a coincidence. It reflects an audience that is newly, and genuinely, looking.

Cost of living: A universal pressure

Across nearly every market represented in this survey, rising living costs have recalibrated what people expect from a relocation decision. After years of elevated inflation in many economies, household budgets are stretched and the threshold for what counts as an affordable destination has shifted accordingly. International professionals are no longer simply asking 'Can I live well there?' they are asking 'Will I be meaningfully better off than I am now?'

New Zealand faces a real tension here. Its cost of living is widely perceived as high, and that perception is not entirely unwarranted. Housing costs in Auckland and Wellington are among the highest in the Asia-Pacific region by most international benchmarks. The national median house price stood at approximately NZD 787,000 in December 2025. Rental costs in city centres have continued to rise, even as inflation in the broader economy has begun to moderate. For respondents from markets where salaries are high but relative to global comparisons (notably India and the Philippines), cost of living is the single biggest stated concern in both waves of this survey.

The nuance, however, is that New Zealand's cost of living looks different depending on where you are coming from. For Americans comparing cost-of-living indices, New Zealand is materially more affordable than several major US cities. For South Africans and Nigerians considering a move, the cost differential cuts the other way, but so does the currency advantage once you are earning in NZD. This asymmetry shows up clearly in the cross-tabulations explored in later chapters.

Remote work: The bridge that changed the game

The global normalisation of remote and hybrid work has fundamentally changed the calculus of international mobility. Professionals no longer need to secure a local job before making a move. Increasingly, they do not need to make a permanent, irreversible commitment either. Countries that have introduced digital nomad visas and remote work pathways have seen meaningful upticks in interest from globally mobile talent.

For New Zealand, this trend is particularly relevant. The Q1 2026 survey, for the first time, asked respondents whether they would consider working for a New Zealand employer remotely before physically relocating. The response was emphatic: 83.6 percent said yes, with a further 13.7 percent saying maybe. Only 2.7 percent said no outright. This is not a peripheral finding. It suggests a significant pool of talent willing to test the waters before committing and a policy and employer-practice gap that New Zealand has yet to fully capitalise on.

> 83.6% of respondents said they would consider working remotely for a New Zealand employer before relocating. That is a door New Zealand has not yet fully opened.

2.3 Where New Zealand sits in the global conversation

New Zealand is a well-regarded country with an outsized reputation for quality of life, natural beauty, and political stability. That reputation has long preceded it in global talent conversations and the data in this survey confirms it is intact. What remains a work in progress is the translation of that positive brand into a clear, navigable proposition for international professionals who are actively weighing their options.

On the policy front, the New Zealand government has taken meaningful steps. In September 2025, significant changes to the Skilled Migrant Category Resident Visa were announced, with two new pathways to residence introduced: a Skilled Work Experience pathway for professionals in ANZSCO skill levels 1 to 3, and a Trades and Technician pathway for qualified tradespeople. Both pathways reduced the New Zealand work experience requirement from up to three years to a maximum of two, and simplified wage threshold requirements. These changes, which take effect from late August 2026, are explicitly designed to make the country more internationally competitive in its pursuit of skilled talent.

That said, New Zealand's net migration gain fell sharply in 2025, to just 11,900 people in the year to October, down from 35,400 the previous year, and far below the record 135,700 recorded in 2023. That decline reflects a combination of factors: the tail-end of a post-pandemic surge, tightening fiscal conditions that dampened public sector hiring, and the persistent visa complexity that our survey respondents identify as their number one concern. The opportunity, and the urgency, is clear.

New Zealand also faces an increasingly competitive global landscape for the same talent it is seeking. Australia remains the dominant alternative in the region; Canada and the United Kingdom, despite losing some ground, remain deeply embedded in the consideration set of globally mobile professionals. The data in Chapter 9 shows that when respondents name competing destinations, Australia tops the list at considerable volume reflecting both geographical proximity and the strength of the Australian migration brand.

> New Zealand has a brand that people trust and a proposition that people want. The gap is closable. It sits between aspiration and accessible pathway.

Table 2.1 - Global context snapshot: Key forces shaping talent mobility (2025–2026)

Force	What's happening	Relevance to New Zealand
US political climate	Net migration negative for first time since 1935; rising emigration intent among professionals	American respondents doubled between waves; positive New Zealand sentiment surged
Global talent demand	74% of employers struggle to find skilled workers; shortfall projected to deepen	New Zealand competes for same globally mobile professionals sought by 130+ other countries
Cost-of-living pressure	Household budgets stretched globally; affordability now a primary relocation filter	New Zealand cost of living is top concern in survey, but relative to origin matters
Remote work normalisation	Digital nomad visas proliferating; professionals seek trial-before-commit pathways	83.6% open to remote work for New Zealand employer first, a largely untapped pipeline
New Zealand immigration reform	SMC reforms announced Sept 2025; two new residence pathways effective Aug 2026	Policy signals are positive; communication of changes lags awareness
New Zealand net migration decline	11,900 net gain in year to Oct 2025 vs 135,700 at peak in 2023	Urgency to rebuild inbound pipeline; survey interest suggests latent demand is strong

With this context in mind, the survey findings that follow are not simply statistics about New Zealand. They are a snapshot of how globally mobile professionals living through a period of genuine disruption are thinking about their options. And for New Zealand, the timing could hardly be more interesting.

Chapter 3
The headline numbers

Chapter 3

The headline numbers

Before we go deep into segments and subgroups, it is worth stepping back and asking: what does the data tell us at the highest level? Across four core questions (perception, career opportunity, interest in moving, and steps already taken) a clear and consistent picture emerges. New Zealand's appeal is growing. The direction of travel between Q4 2025 and Q1 2026 is unambiguous, and in most cases the movement is meaningful, not marginal.

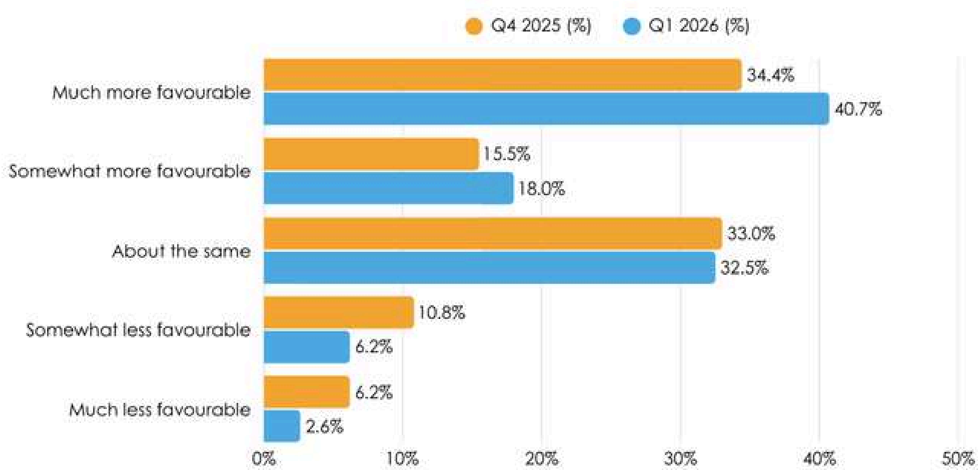
This chapter presents those top-line shifts. It is the foundation on which the rest of this report is built.

3.1 Perception of New Zealand as a place to live and work

The first and most fundamental question we ask is whether people's overall view of New Zealand, as a place to live and work, has changed over the past twelve months. In Q4 2025, 49.9% of respondents said their perception had become more favourable (combining 'somewhat' and 'much more favourable'). By Q1 2026, that figure had risen to 58.7%. The proportion who said their view had become less favourable fell from 17.1% to 8.9%.

That is a 17-percentage-point swing in positive sentiment in the space of a single survey cycle. The 'much more favourable' category alone jumped from 34.4% to 40.7%, nearly half of all respondents using the strongest possible positive language. And the proportion saying 'much less favourable' more than halved, from 6.2% to 2.6%.
These are not subtle fluctuations. Something shifted in how the world is looking at New Zealand between late 2025 and early 2026, and the external context explored in Chapter 2 goes a long way toward explaining why.

Figure 3.1: Perception change, wave-on-wave comparison



3.2 Rated career opportunities: improving confidence

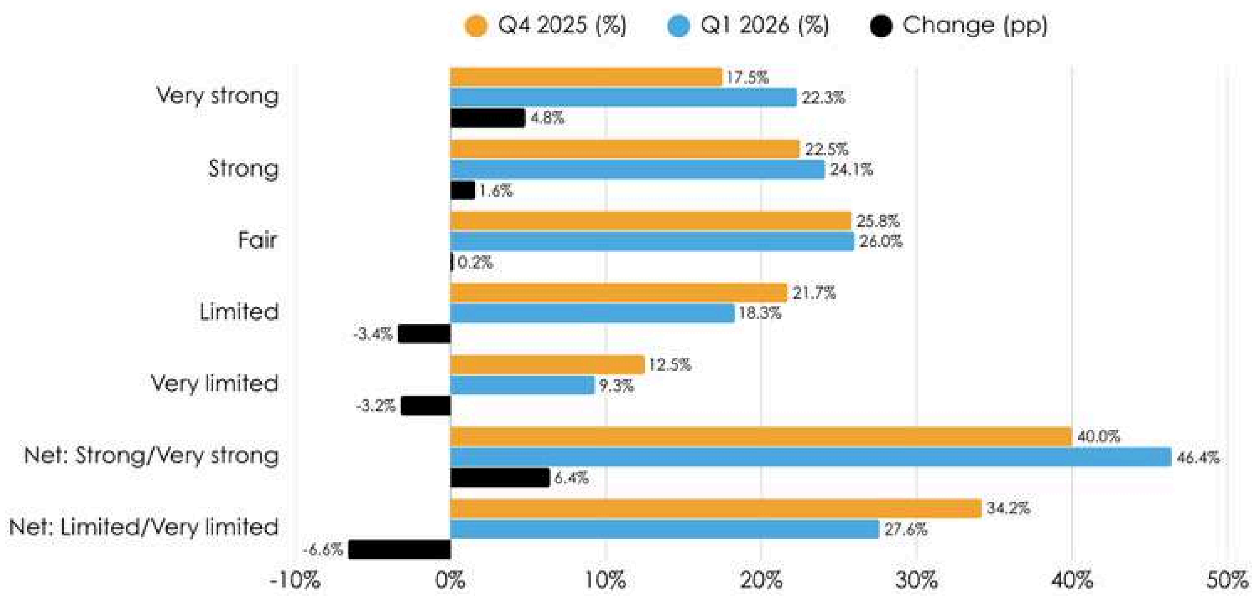
The second headline shift is in how respondents rate career opportunities in New Zealand for someone like them. This question is perhaps the most commercially grounded of the four: it asks people to make a judgment not just about how they feel about NZ, but whether they believe they could realistically build a career there.

In Q4 2025, the picture was balanced but slightly skewed toward caution: 25.8% rated opportunities as 'fair', 22.5% as 'strong', 21.7% as 'limited', 17.5% as 'very strong', and 12.5% as 'very limited'. The positive options (strong + very strong) accounted for 40.0% of responses; the negative options (limited + very limited) for 34.2%.

By Q1 2026, the balance had shifted decisively. The positive ratings (strong + very strong) rose to 46.4%, while the negative (limited + very limited) fell to 27.6%. The proportion rating opportunities as 'very strong' rose from 17.5% to 22.3%, a 4.8-point jump that brings it neck-and-neck with 'fair' as the second most common response.

This movement matters because opportunity perception is, in many ways, the most actionable metric. Sentiment about lifestyle is relatively fixed; New Zealand's landscapes are not changing. But perceptions of career prospects are shaped by what people hear, read, and experience. They can be moved by better employer visibility, more active international recruitment, and clearer communication of what opportunities actually exist.

Figure 3.2: Career opportunity rating, wave-on-wave comparison



3.3 Interest in living and working in New Zealand: still strong, and growing

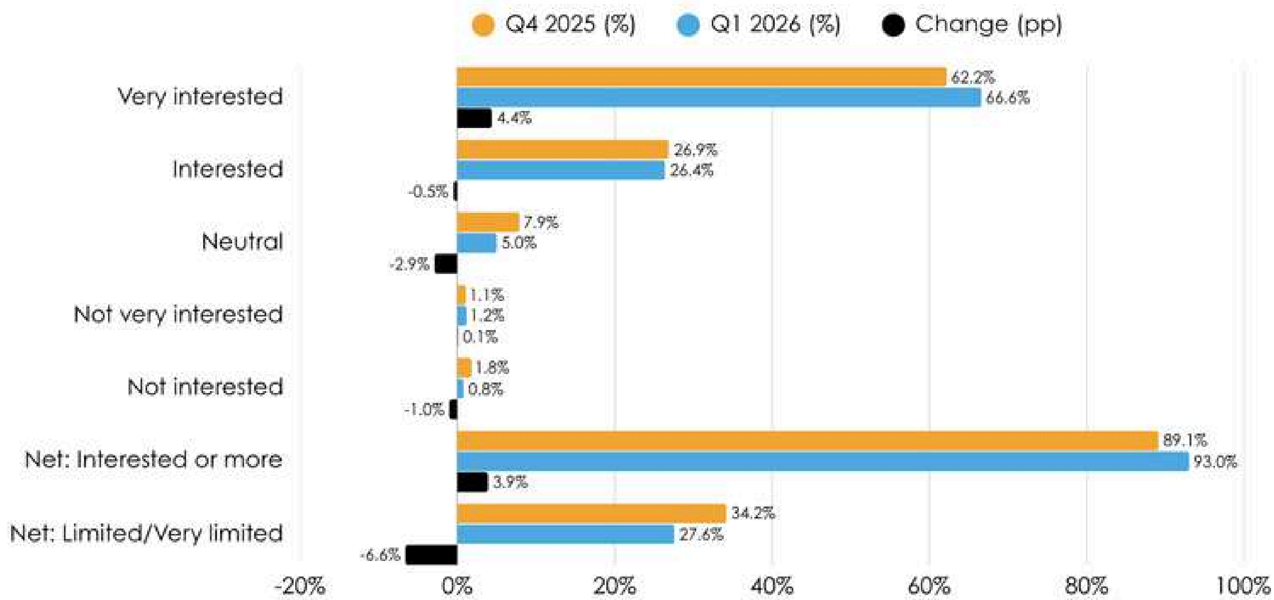
The third metric is the most direct measure of intent: how interested are respondents in actually living and working in New Zealand in the future? The Q4 2025 baseline was already striking. 62.2% said 'very interested', and a further 26.9% said 'interested'. That is 89.2% of the international respondent pool indicating some level of genuine interest. In Q1 2026 those figures rose again: 66.6% very interested, 26.4% interested, 93.0% in total.

The proportion who said they were neutral fell from 7.9% to 5.0%. Those expressing disinterest ('not very' or 'not interested') dropped from 2.9% to 2.0%. These are already small numbers, but the direction of movement is consistent: over two waves, the fence-sitters are converting, and the disinterested are becoming a smaller fraction of an already-engaged audience.

A note of methodological caution here: the survey distribution channels attract people with some existing awareness of or curiosity about New Zealand. This is not a random sample of the global working population. The high interest scores reflect the nature of who is responding, not a claim that 93% of global talent wants to move to New Zealand. Within the audience this survey is designed to reach (globally mobile professionals actively thinking about their next move), New Zealand commands near-universal interest. That is a powerful foundation.

> 93% of respondents in Q1 2026 expressed some level of interest in living and working in New Zealand. Among a globally mobile, actively-considering audience, that is an exceptionally strong foundation.

Figure 3.3: Interest level, wave-on-wave comparison



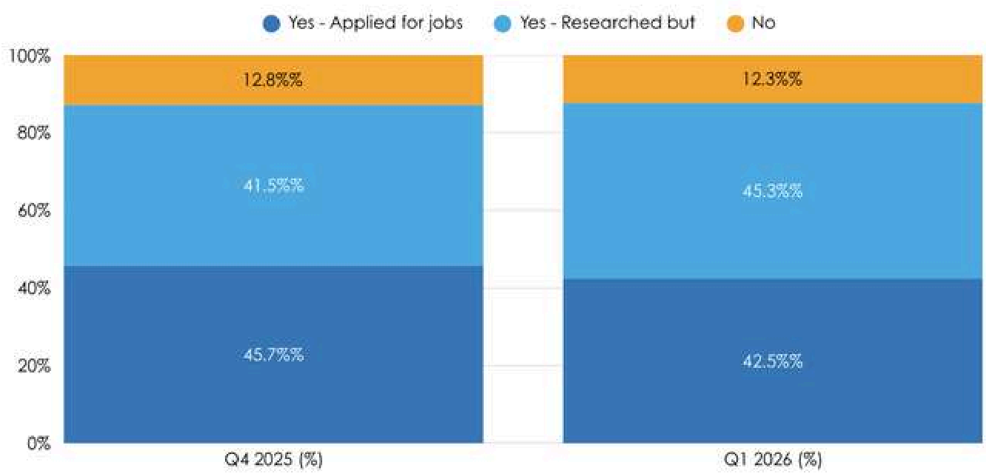
3.4 Steps already taken: active vs. passive intent

The final headline metric moves from sentiment to behaviour: have respondents actually done anything about their interest in New Zealand? The answers reveal an audience that is not merely daydreaming.

In Q4 2025, 43.1% of respondents had already applied for jobs or visas, a remarkably high proportion for a survey of this nature. A further 44.5% had researched but not yet applied. Only 12.4% had taken no steps at all. In Q1 2026, the pattern shifted slightly: the 'researched but not applied' group grew to 47.9%, while the 'applied' group dipped to 38.7%. The 'no steps' proportion held broadly stable at 13.4%.

This shift from 'applied' to 'researched' between waves could reflect the larger and more globally diverse Q1 2026 sample, which includes more respondents from markets where NZ is newer to the consideration set. It may also reflect the broader global uncertainty of the period: people researching their options more carefully before committing. Either way, the combined active engagement figure (those who have taken any step at all) remains above 86% in both waves.

Figure 3.4: Steps taken toward moving to NZ, wave-on-wave



Taken together, the four headline metrics tell a consistent and encouraging story: New Zealand's brand as a destination for globally mobile talent is strengthening. Favourable perception is rising, career confidence is improving, interest remains near-universal among the engaged audience, and the vast majority have already taken at least some concrete step toward making a move. The question (explored in the chapters that follow) is what is holding the remaining percentage back, and what it would take to convert research into applications, and applications into arrivals.

Chapter 4
Regional awareness and career visibility

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Regional awareness and career visibility

Interest in New Zealand is high. The desire to come is genuine and growing. But desire needs direction, and for a significant share of the professionals in this survey, that direction is either missing or incomplete. They know they want New Zealand. They are less sure which New Zealand. And many are not yet certain there is a career there for them at all.

This chapter examines two interconnected gaps: the narrow slice of the country that international talent can actually picture, and the uncertainty that remains about what kind of professional life New Zealand can offer. Together they represent perhaps the most actionable finding in this report. Unlike lifestyle appeal, which is built over decades, visibility can be changed deliberately and quickly.

4.1 The city cliff

Task globally mobile professionals which parts of New Zealand they are familiar with, and the pattern is steep and consistent. Auckland is known by 73.7% of Q1 2026 respondents. Wellington by 61.0%. After that, the numbers fall sharply and barely recover.

Christchurch reaches 43.9% and Queenstown 34.3%. Then the cliff. Dunedin is known to 17.1% of respondents. Rotorua to 15.4%. Tauranga to 13.4%. Hawke's Bay to 11.9%. Nelson to 10.6%. Below that, the figures are single digits across the board.
These are not obscure places. Several are home to significant regional economies, genuine skills shortages, and a quality of life that routinely outperforms the major centres on affordability and community character. But to the internationally mobile professionals who represent New Zealand's most promising talent pipeline, they are effectively invisible.

One in five respondents (20.1% in Q1 2026) said they are not familiar with any part of New Zealand at all. That figure has not moved in a year. Survey participation doubled between waves. Overall interest in New Zealand grew. And yet the proportion with zero regional familiarity is essentially unchanged. Interest in New Zealand is growing. Knowledge of New Zealand is not.

> One in five internationally mobile professionals interested in New Zealand cannot name a single part of it. And that number has not shifted in a year, even as overall interest has grown significantly.

Figure 4.1: Regional awareness in New Zealand, wave on wave

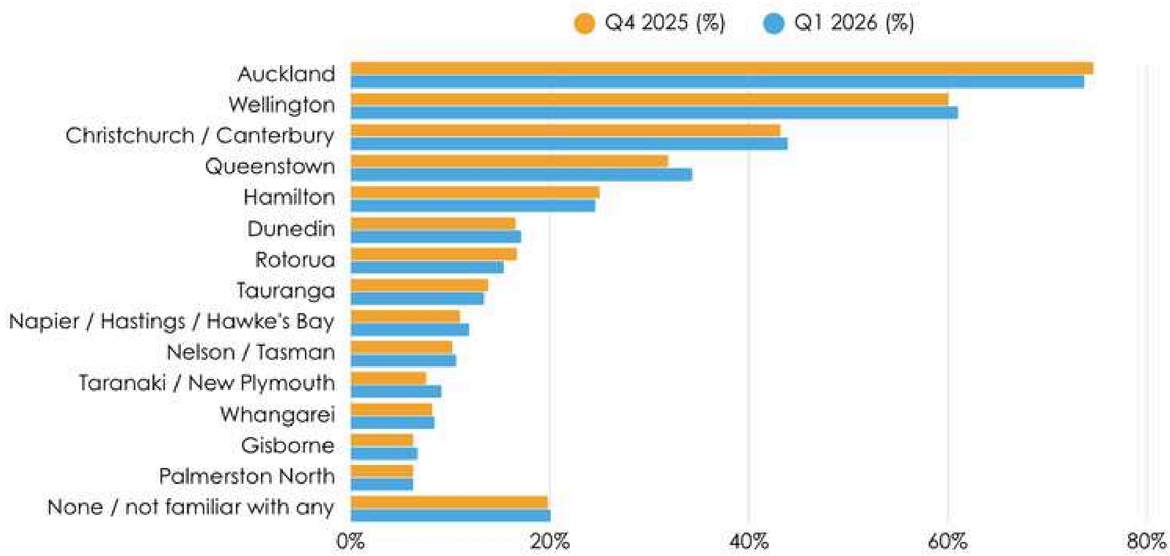


Figure 4.1: Familiarity with NZ regions and cities, Q4 2025 vs Q1 2026 (excl. NZ nationals). Multiple selections permitted.

4.2 What familiarity does to intent

The regional awareness data becomes particularly powerful when crossed with intent to move. Respondents familiar with four or more regions of New Zealand say they are very interested in moving at a rate of 74.4%. Among those who know no regions at all, that figure drops to 58.3%. That is a 16-percentage-point gap in intent, and it is driven almost entirely by familiarity.

The pattern is not perfectly linear. Respondents who know two to three regions show slightly lower intent (59.9%) than those who know just one (71.6%), which likely reflects a compositional effect rather than a genuine dip. But the directional finding is clear and consistent: the more of New Zealand a person can picture, the more seriously they consider making the move.

Career confidence follows a similar pattern. Respondents familiar with four or more regions rate NZ career opportunities as strong or very strong at 48.3%, compared to 45.0% for those with no regional familiarity. The gap is narrower than for intent, suggesting that career confidence is shaped by factors beyond geography. But the direction is the same.

This finding has a practical implication that goes well beyond regional promotion. It tells us that regional storytelling is not just good for the regions themselves. It is a lever for national talent attraction. Every time a professional in Bangalore or Chicago learns something concrete about Hawke's Bay or Nelson, they are not just learning about a region. They are building a more credible mental model of New Zealand as a place they could actually live. And that makes them more likely to come.

> Respondents familiar with four or more regions of New Zealand are 16 percentage points more likely to say they are very interested in moving than those who know no regions at all. Regional visibility is not just good for regions. It is a national talent attraction lever.

Figure 4.2: Regional familiarity vs intent and career confidence (Q1 2026)

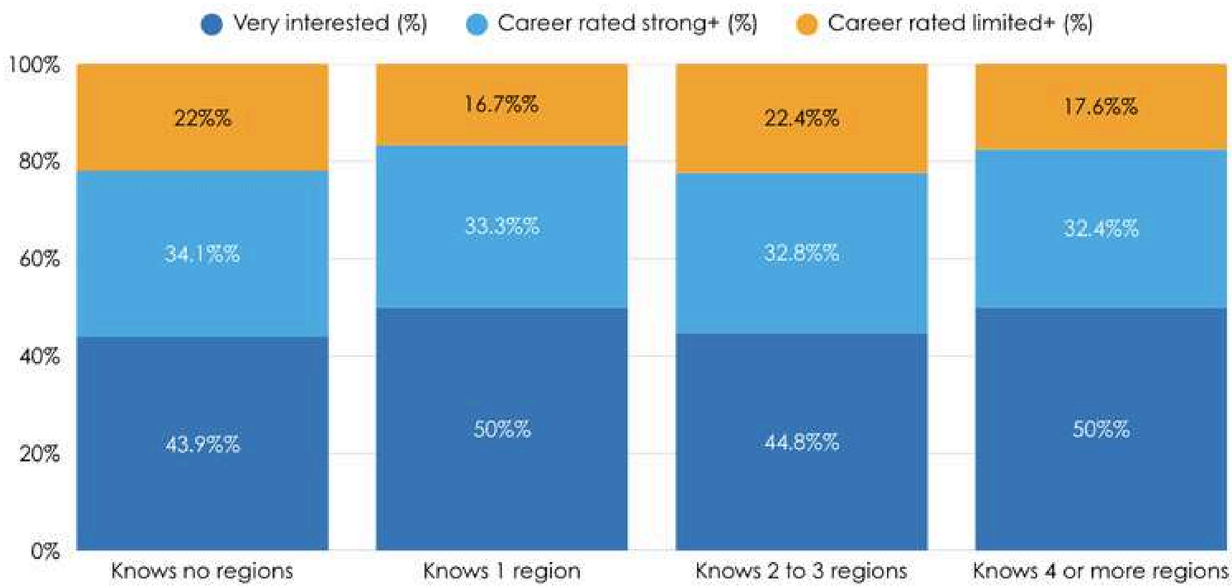


Figure 4.2: Regional familiarity cross-tabulated with intent and career confidence (Q1 2026)

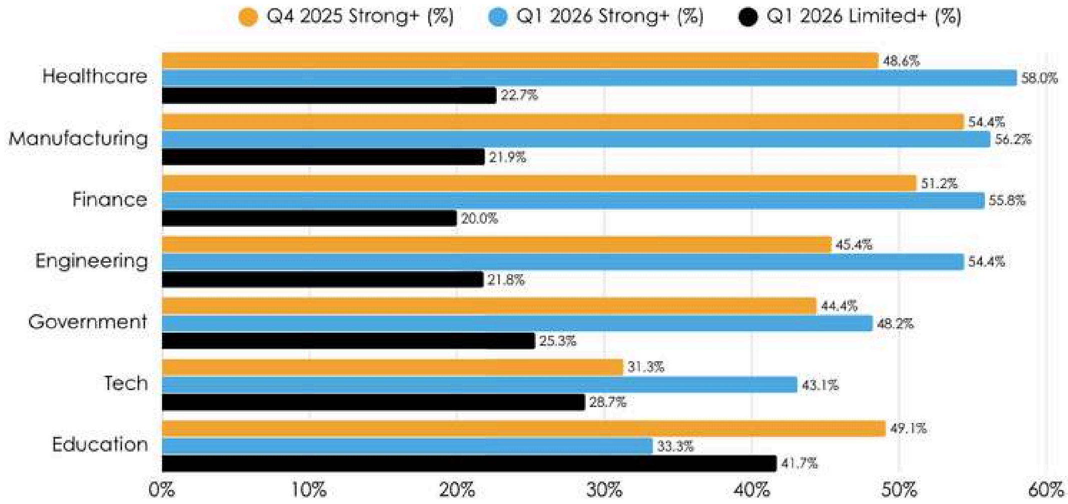
4.3 The career visibility gap

Alongside regional unfamiliarity sits a closely related problem: a significant share of interested professionals cannot clearly see what career opportunities exist in New Zealand for someone like them. In Q4 2025, 30.5% of respondents cited 'not sure what opportunities exist' as one of their top three concerns. By Q1 2026 that had fallen to 26.0%, a 4.5-point improvement and one of the few barrier metrics to show clear positive movement between waves.

But at 26%, this remains a top-five concern. And it sits in a particular category of barrier: it is not about the country being unappealing, or the visa being too complex, or the salary being too low. It is about not having enough information to make a decision. It is an information gap masquerading as hesitation. And information gaps, unlike structural barriers, can be closed by employers and agencies without waiting for policy reform.

Career confidence at the headline level improved from 40.0% to 46.4% between waves, a 6.4-point increase in the proportion rating NZ career opportunities as strong or very strong. The proportion rating them as limited or very limited fell from 34.2% to 27.6%. The direction is positive. But the range of confidence across sectors and countries reveals significant unevenness that the headline figure conceals.

Figure 4.3: Career opportunity rating by sector, Q4 2025 vs Q1 2026



4.4 How career confidence varies by sector

TThe sector-level data tells several distinct stories, and one genuinely concerning one. Healthcare and Engineering have made the strongest gains. Healthcare moved from 48.6% strong or very strong in Q4 2025 to 58.0% in Q1 2026, a 9.4-point improvement. Engineering rose 9.0 points to 54.4%. Both now sit comfortably above the overall average, suggesting that New Zealand's career narrative for these sectors is landing with international audiences, or at minimum that global labour market conditions are making the NZ offer look increasingly competitive.

Tech, which accounts for 45.5% of all respondents, rose 11.8 points from 31.3% to 43.1%. That is the largest absolute improvement of any sector. But 43.1% still places Tech below the overall average, and 28.7% of tech respondents still rate NZ career opportunities as limited or very limited. For a country with genuine technology ambitions, this is the career visibility gap that matters most in volume terms.

Manufacturing and Finance both show solid confidence at 56.2% and 55.8% respectively. Government sits at 48.2%, just above the overall average with modest improvement.

Education stands apart. It is the only sector to show a decline in career confidence between waves: from 49.1% in Q4 2025 to 33.3% in Q1 2026, a fall of 15.7 percentage points. It also has the highest proportion rating NZ career opportunities as limited or very limited, at 41.7%. This is a significant finding. Whether it reflects worsening perceptions of New Zealand's education sector specifically, a change in the composition of education respondents between waves, or the domestic funding pressures that have been publicly reported, it warrants attention. New Zealand has genuine international educator recruitment needs, and the data suggests the career proposition for that audience is not currently landing.

> Education is the only sector where career confidence in New Zealand fell between waves, dropping 15.7 percentage points. It is now the lowest-rated sector of all, with 41.7% of education professionals rating NZ career opportunities as limited or very limited.

Figure 4.4: Career opportunity rating by country, Q4 2025 vs Q1 2026

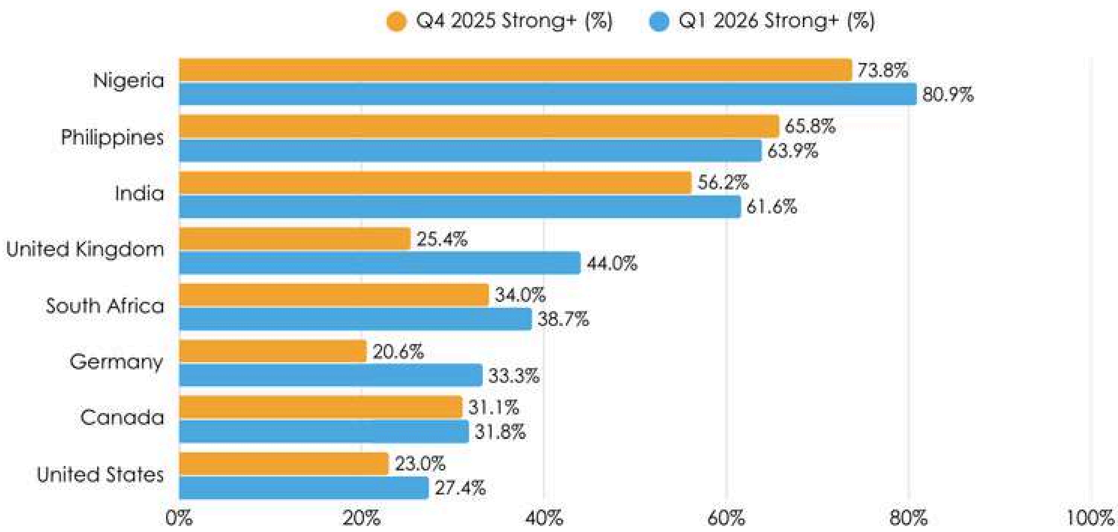


Table 4.4: Career opportunity rating (strong or very strong) by country, Q4 2025 vs Q1 2026

4.5 How career confidence varies by country

Country-level career confidence data reveals three distinct groups: markets where New Zealand's career proposition is genuinely resonating, markets where confidence is improving rapidly, and markets where a significant gap remains.

High-confidence markets

Nigeria leads all markets at 80.9% strong or very strong, up 7.0 points from Q4 2025. The Philippines and India follow at 63.9% and 61.6% respectively, both well above the overall average. These are markets where New Zealand's career proposition, while perhaps imperfectly understood in geographic detail, is widely seen as offering a meaningful professional step forward. The combination of career aspiration and lifestyle motivation in these markets creates a high-propensity audience that targeted career visibility investment would convert efficiently.

Rapidly improving markets

The most striking movements between waves belong to the UK and Germany. UK career confidence rose 18.6 points in a single cycle, from 25.4% to 44.0%. Germany rose 12.7 points to 33.3%. Both markets started from a low base and have moved sharply toward the positive. The UK improvement is a particularly notable signal: a market with long-standing lifestyle interest in New Zealand is now beginning to build genuine career conviction alongside it. If that trend continues into a third wave, it will represent a meaningful shift in how New Zealand's professional landscape is understood in a key English-speaking source market.

The persistent gap: United States and Canada

The United States remains the most career-uncertain large market in the survey. Only 27.4% of American respondents rate NZ career opportunities as strong or very strong, the lowest figure of any major market. Given that American respondents grew 2.5x between waves and now represent the single largest national group in the Q1 2026 sample, this is the most consequential career visibility gap in the dataset. Americans are coming to this survey in large and growing numbers, motivated by powerful external forces. But they cannot yet see the professional future that New Zealand might offer them clearly enough to act on that motivation. Canada shows a similarly low career confidence figure at 31.8%, essentially unchanged from 31.1% in Q4 2025.

Figure 4.5: Regional familiarity by sector (Q1 2026)

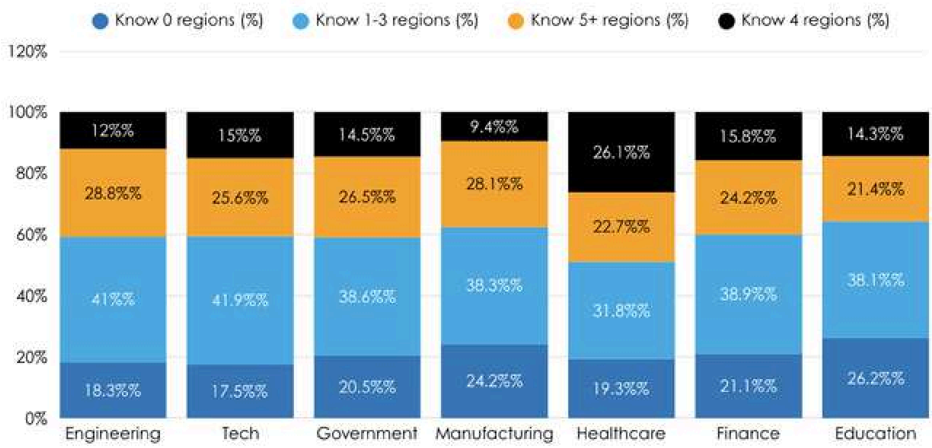


Figure 4.5: Regional familiarity by sector (Q1 2026)

4.6 The regional-career connection

When regional familiarity is examined at sector and country level, a consistent pattern emerges. The sectors and markets with the weakest regional knowledge also tend to show the lowest career confidence. The connection is directional and meaningful.

By sector, Education professionals have the poorest regional knowledge of any group: 26.2% know no regions of New Zealand at all, the highest zero-familiarity rate of any sector. Fewer than 36% know four or more regions. They are also the sector with the lowest career confidence. Finance and Manufacturing show above-average zero-familiarity rates at 21.1% and 24.2% respectively, and both sit below the overall career confidence average. Healthcare, by contrast, has the highest share of respondents knowing four or more regions at 48.9%, and the highest career confidence rating.

By country, Nigeria shows the highest zero-familiarity rate of any major market at 27.7%, yet maintains the highest career confidence. This tells us something useful: career confidence can be built independently of geographic knowledge, through professional networks, employer brand, and sector reputation. But for most markets, the two tend to move together. India and the UK, two markets with the strongest regional knowledge at averages of 4.21 and 3.96 regions respectively, also show the largest improvements in career confidence between waves.

Figure 4.6: Regional familiarity by country (Q1 2026)

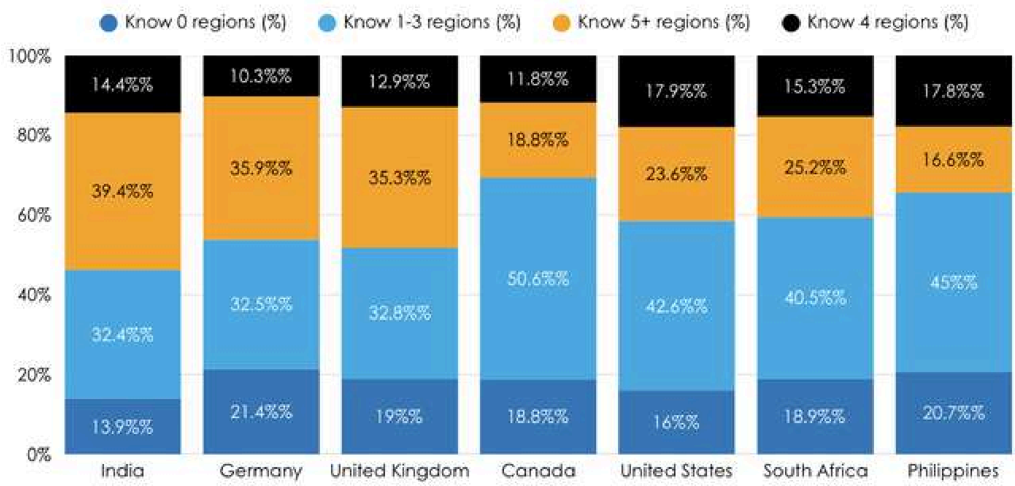


Figure 4.6: Regional familiarity by country of residence (Q1 2026)

4.7 What this means for employers and regions

The findings in this chapter converge on a single practical insight. New Zealand's talent attraction challenge is not just national, it is geographic. The country is being evaluated through its most famous cities, and its career market is being imagined rather than understood. Both of those problems are solvable, but they require deliberate action.

For regions, the implication is direct. International talent cannot consider what it cannot see. Regions with genuine skills shortages, affordable housing, and strong lifestyle credentials are simply absent from the mental map of the globally mobile professionals who might be their best recruitment source. Regional storytelling, specific, concrete, and employer-led, is not a secondary priority. It is a prerequisite for being part of the conversation at all.

For employers, the career visibility gap is an opportunity as much as a problem. A visible employer, actively recruiting internationally with clear role descriptions and honest salary context, does not just fill positions. It improves the career confidence of an entire market segment.

And for the US market specifically, the combination of low career confidence (27.4% strong+) and the fastest respondent growth of any market in the survey represents a compounding opportunity. American professionals are looking at New Zealand with real intent. What they need is a clearer picture of what they would be looking at.

Chapter 5
Who's looking at New Zealand?

Chapter 5

Who's looking at New Zealand?

A survey is only as useful as the audience it captures. Understanding who our respondents are, where they live, what they do, and how that composition changed between waves, is essential context for everything that follows. It also tells its own story about which markets are heating up and which parts of the global talent pool are most actively considering New Zealand as a destination.

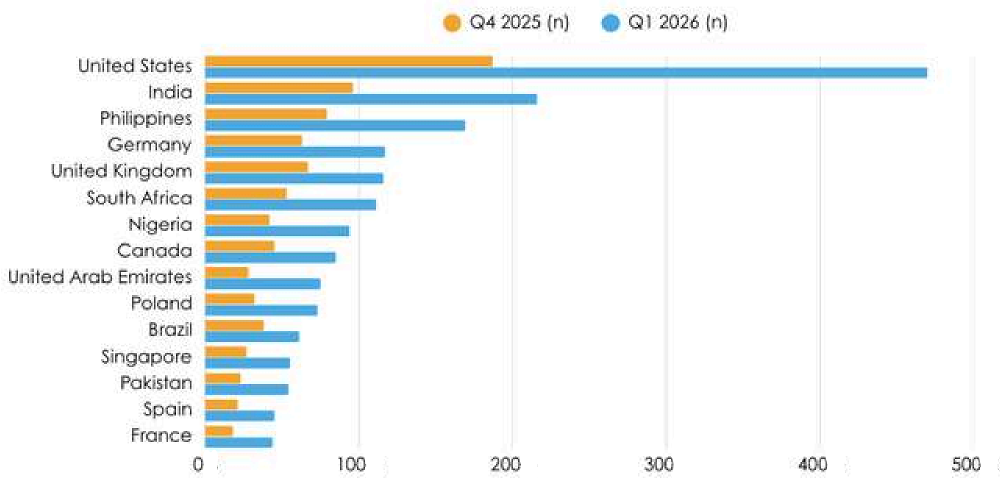
5.1 Geographic breakdown, where respondents live today

The Q4 2025 survey captured responses from 114 countries. By Q1 2026, that had grown to 138. The top ten markets remained consistent across both waves, but the relative weights shifted in ways that carry meaningful implications for targeting and messaging.

The United States remains the single largest source market in both waves, and its dominance grew: from 187 respondents in Q4 2025 to 470 in Q1 2026, a 151% increase that far outpaces the overall survey growth rate of 116%. India and the Philippines maintained their positions as the second and third largest markets respectively, with both growing at broadly in line with the overall sample. Germany moved ahead of the United Kingdom into fourth position by Q1 2026, while the UAE showed the strongest proportional growth of any top-ten market at 168%.

Beyond the top ten, the survey captured meaningful numbers from Spain, France, Italy, Argentina, Malaysia, and Mexico in Q1 2026, markets that were present but smaller in the first wave. This broadening of the geographic base reflects both the wider distribution of the survey and what appears to be growing organic interest from markets that have not traditionally featured heavily in New Zealand's talent attraction efforts.

Figure 5.1: Top 15 respondent countries by wave



> The UAE showed 168% growth between waves, the fastest of any top-ten market. Among a pool of highly mobile, globally connected professionals, interest in New Zealand is broadening well beyond its traditional English-speaking base.

5.2 Regional groupings, reading the map

Grouping respondents by region helps identify broader patterns. Four regional clusters account for the majority of responses in both waves.

North America (US + Canada) is the single largest regional block, representing 17.8% of the Q4 2025 sample and 19.8% of Q1 2026: a growing share. The growth is almost entirely driven by the US, as explored in Chapter 8.

South and Southeast Asia (India, Philippines, Pakistan, Singapore, Malaysia) represents 20.4% of Q4 2025 and 19.7% of Q1 2026: broadly stable as a share, though growing strongly in absolute volume. This region consistently shows the highest levels of interest and most favourable career opportunity ratings, making it a high-propensity audience for targeted outreach.

Western Europe (UK, Germany, Poland, Spain, France, Netherlands, Italy) accounts for 19.3% of Q4 2025 and 21.0% of Q1 2026. Germany's rise to fourth overall and the emergence of Spain, France, and Italy as meaningful markets suggests that NZ's European appeal is broadening beyond its traditional UK base.

Africa (South Africa, Nigeria) represents 7.3% of Q4 2025 and 7.3% of Q1 2026: stable share, strong absolute growth. Both markets show high interest and, particularly in Nigeria's case, very strong career opportunity optimism. Distance is the key friction point.

Table 5.2: Regional share of respondents (Q1 2026)

Region	Q4 2025 (n)	Q4 2025 (%)	Q1 2026 (n)	Q1 2026 (%)
North America	232	17.80%	555	19.80%
South & SE Asia	265	20.40%	552	19.70%
Western Europe	251	19.30%	590	21.00%
Africa	95	7.30%	205	7.30%
Middle East	65	5.00%	160	5.70%
Latin America	72	5.50%	140	5.00%
Eastern Europe	72	5.50%	156	5.60%
East Asia & Pacific	45	3.50%	110	3.90%
Other / Not specified	203	15.60%	338	12.10%

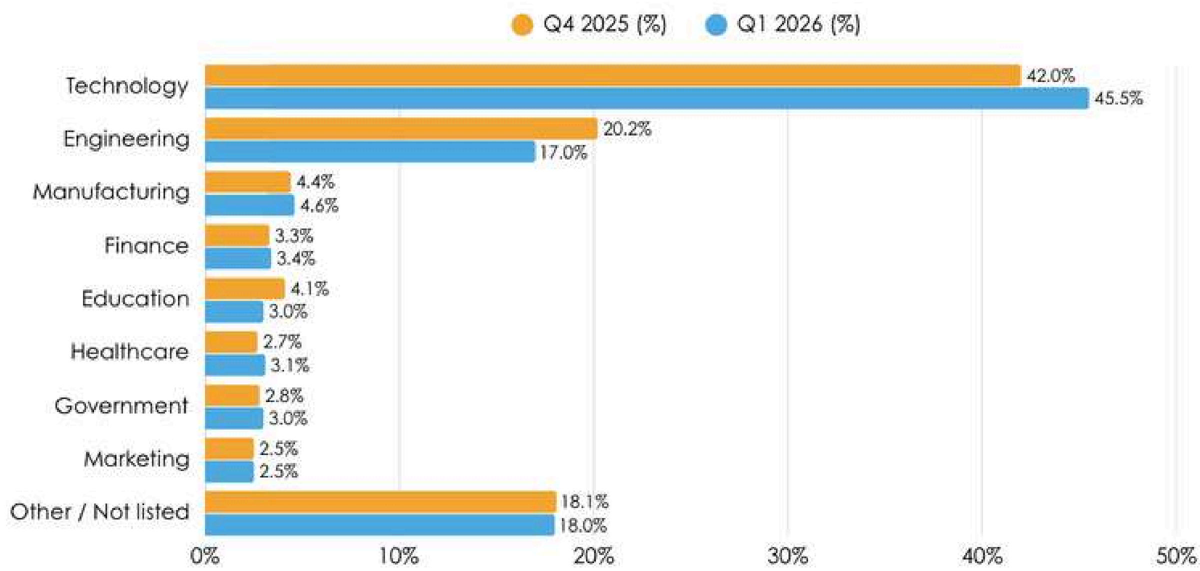
5.3 Sector breakdown, a talent pool dominated by tech

The sector profile of respondents is striking in its consistency across both waves. Technology professionals account for approximately 42 to 46% of respondents in both surveys, a concentration that reflects the global mobility of tech workers and the reach of digital channels through which the survey was distributed.

Engineering is a solid second at around 17 to 20%, followed by a long tail of Manufacturing, Finance, Healthcare, Education, Government, and Marketing professionals. This composition is not accidental: globally mobile talent in the early 21st century skews heavily toward knowledge economy roles, and tech workers in particular are both more geographically flexible and more likely to actively research international opportunities.

For New Zealand, the tech and engineering concentration in the respondent pool is a signal worth heeding. These are professions in which New Zealand faces genuine shortages and where the perception gap between 'interested in NZ' and 'confident in NZ career prospects' is one of the report's more important findings.

Figure 5.3: Sector breakdown by wave



5.4 The growth story, which markets moved most

The overall 116% growth in survey participation between waves masks significant variation at the country level. Understanding which markets grew fastest (and why) is important context for where New Zealand should direct attention and investment in its talent attraction efforts.

The UAE's 168% growth stands out as the strongest proportional increase among major markets. The UAE has become a significant hub for internationally mobile professionals, particularly from South Asia and Africa, who use it as a staging post. Many of these professionals hold multiple passports, have experience working across borders, and are actively evaluating longer-term relocation options. New Zealand's growing UAE interest base represents an indirect pipeline from a broad range of origin countries.

The United States' 151% growth is the headline finding of this wave, explored in detail in Chapter 8. France and Pakistan both showed strong growth of over 130%, suggesting that markets which were previously peripheral to New Zealand's talent attraction conversation are beginning to engage more actively. The United Kingdom's comparatively modest 73% growth, which sits below the survey average, may reflect both the maturity of the existing NZ-UK talent relationship and the pull of post-Brexit European mobility options that are diverting some attention.

> The fastest-growing markets are not always the ones with the highest absolute volumes. The UAE, France, and Pakistan are all growing at rates that suggest emerging rather than established interest and emerging interest is precisely when intervention has the most impact.

Chapter 6
What draws people in

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What draws people in

Understanding what attracts people to New Zealand is not simply a question of marketing positioning. It reveals the authentic currency that New Zealand holds in the minds of globally mobile talent. The things that make it genuinely different from the 138 other countries those respondents could choose. This chapter examines the pull factors in detail: what the top-line numbers show, how they compare across the two waves, and (critically) how they differ by nationality and by sector.

6.1 Top excites overall, wave-on-wave

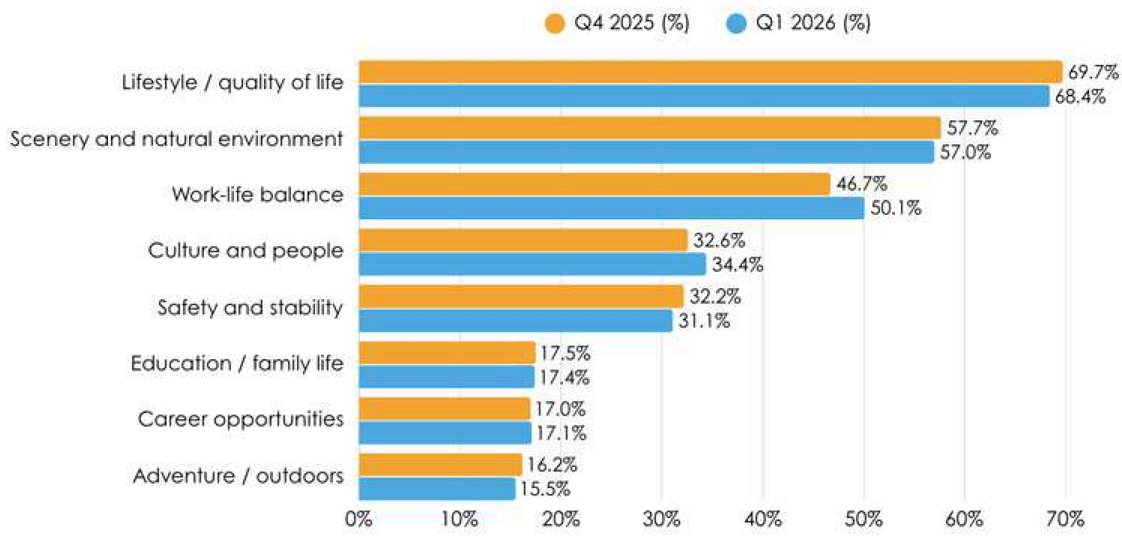
Respondents were asked to select up to three things that most excite them about New Zealand. Across both waves, the results are strikingly consistent at the top of the list, but there are meaningful movements in the middle that are worth unpacking.

Lifestyle and quality of life remains unchallenged at number one: cited by 69.7% in Q4 2025 and 68.4% in Q1 2026. Scenery and natural environment holds firm in second place at 57.7% and 57.0% respectively. Together, these two factors account for the dominant share of New Zealand's emotional appeal. Their consistency across both waves suggests these are not passing enthusiasms but deeply embedded parts of the country's global identity.

The most notable movement between waves is in work-life balance, which rose from 46.7% to 50.1%, crossing the majority threshold for the first time. This is a meaningful signal. In a global context of burnout, long hours cultures, and political instability,
New Zealand's reputation as a place where people can actually live their lives (not just work in them) is resonating more strongly than before. Culture and people nudged up from 32.6% to 34.4%, suggesting that the human dimension of New Zealand's appeal is gradually gaining ground alongside its physical attractions.

Career opportunities, as a stated excite factor, held almost perfectly flat: 17.0% in Q4 2025 and 17.1% in Q1 2026. This is the one dimension where New Zealand's pull is notably weaker than its lifestyle proposition, a gap that corresponds directly with the career opportunity perception data in Chapter 3 and the barriers explored in Chapter 7.

Figure 6.1: Top excites, wave-on-wave comparison



6.2 How excitement differs by nationality

The overall rankings conceal considerable variation by market. When we break the data down by country of residence, a more nuanced and strategically useful picture emerges. One where the same destination means quite different things depending on where you are coming from.

United States – lifestyle and culture lead

American respondents index notably higher than the global average on lifestyle (75.1%), scenery (67.4%), and culture & people (48.5%). Work-life balance, while present, ranks fourth for this group at 37.2%, below the global average. For US respondents, New Zealand appears to represent a fundamentally different way of life rather than simply a better version of what they already have. The culture dimension (at 48.5%, fully 14 points above the global figure) suggests that for Americans, it is New Zealand's social character as much as its physical beauty that is drawing them in. Given the political and social turbulence in the United States during this period, this is not surprising.

India – work-life balance dominates

Indian respondents flip the typical hierarchy: work-life balance is their top excite factor at 62.5%, above even lifestyle (70.4%) and scenery (55.1%). Career opportunities rank higher here than in most other markets, reflecting a practical, professionally-grounded motivation for considering New Zealand. This is an audience that is attracted to the idea of a more balanced professional life, not merely a more beautiful one.

Philippines – career and work-life balance above scenery

Filipino respondents show a distinctly different profile from most markets: work-life balance is their top factor at 64.5%, with lifestyle second at 58.6%. Most notably, career opportunities ranks fourth at 34.9%, nearly double the global average. This reflects the Philippines' status as a major labour-exporting nation, where international migration is often driven primarily by professional and economic aspiration rather than lifestyle preference. New Zealand needs to speak the career opportunity language more fluently to this audience.

United Kingdom – quality of life above everything

British respondents show the highest lifestyle score of any major market: 83.6%, fully 15 points above the global average. Adventure and outdoors also ranks unusually high at 29.3%. For a population well-acquainted with urbanised, high-cost living in a politically complex post-Brexit environment, New Zealand appears to represent a genuinely different quality of existence. The pull is physical and aspirational.

Germany – nature and culture as primary draws

German respondents are unique in placing scenery and natural environment at the top of their rankings (70.9%), ahead of lifestyle (60.7%). Culture and people scores unusually high at 58.1%, second only to lifestyle for this group and well above the global average. Germans appear drawn to New Zealand's authenticity and distinctiveness as a society, not just its physical environment.

South Africa – safety and stability stands out

South African respondents show a markedly different profile from most markets. Safety and stability scores 54.1%, the highest of any country group and nearly 23 points above the global average. Education and family life also ranks at 31.5%, compared to 17.4% globally. This is an audience for whom the practical security dimensions of a relocation decision carry exceptional weight, reflecting the real-world conditions in South Africa that are motivating their consideration of moving.

> Safety and stability is cited by 54% of South African respondents, compared to just 24% of Americans. The same destination means very different things depending on what you are leaving behind.

Table 6.2: Top excites by country of residence (Q1 2026)

Country	Top Factor (1st)	2nd Factor	3rd Factor	Standout vs Global Avg
United States	Lifestyle 75.1%	Scenery 67.4%	Culture 48.5%	Culture +14.1pp
India	Lifestyle 70.4%	Work-life 62.5%	Scenery 55.1%	Work-life +12.4pp
Philippines	Work-life 64.5%	Lifestyle 58.6%	Scenery 52.7%	Career opps +17.8pp
United Kingdom	Lifestyle 83.6%	Scenery 64.7%	Work-life 46.6%	Lifestyle +15.2pp
Germany	Scenery 70.9%	Lifestyle 60.7%	Culture 58.1%	Culture +23.7pp
South Africa	Lifestyle 66.7%	Safety 54.1%	Work-life 51.4%	Safety +23.0pp
Nigeria	Lifestyle 59.6%	Work-life 53.2%	Safety 42.6%	Career opps +23.3pp
Canada	Scenery 68.2%	Lifestyle 65.9%	Work-life 48.2%	Scenery +11.2pp

6.3 How excitement differs by sector

Sector also shapes the attraction profile, though generally with less dramatic variation than nationality. The common thread across all sectors is that lifestyle leads, but the relative weight of work-life balance, safety, and career opportunity varies in ways that have implications for how New Zealand communicates its proposition to different professional communities.

Technology professionals lead with lifestyle (70.9%) and scenery (63.2%), but work-life balance is slightly lower for this group (47.6%) than for engineering or healthcare workers. Culture and people scores the highest of any sector here at 38.8%, suggesting that tech talent is drawn to New Zealand's social environment as well as its physical one.

Engineering professionals place work-life balance second, ahead of scenery, one of several sectors where this ordering appears, alongside Government, Manufacturing, and Healthcare. Safety and stability also ranks higher than average for engineers at 34.5%, reflecting the demographics of the engineering respondent pool, which skews toward markets where stability is a primary concern.

Finance professionals show the highest lifestyle score of any sector (76.8%) and the highest work-life balance score after government workers (51.6%). For an industry defined by long hours and high pressure, New Zealand's reputation for a different kind of professional life appears to be a powerful draw.

Healthcare workers, notably, have the lowest lifestyle score of any sector (58.0%) and the highest career opportunities score among the major sectors at 28.4%, well above the 17.1% global average. For this professional group, the decision to relocate is often driven by pragmatic factors including career development pathways, professional progression, and registration recognition, rather than lifestyle alone. Work-life balance still ranks second for healthcare at 51.1%, but the overall profile is more career-grounded than most sectors.

Manufacturing professionals stand out on a different metric: career opportunities ranks third for this group at 31.2%, the highest career score of any sector and nearly double the global average. Combined with elevated safety and stability scores (35.2%), the manufacturing profile suggests a sector where the relocation conversation is anchored as much in professional progression as in lifestyle aspiration. New Zealand's industrial base is small relative to other destinations, and the data suggests manufacturing talent who do consider it are doing so for substantive professional reasons.

Table 6.3: Top excites by sector (Q1 2026, top 4 factors per sector)

Sector	Lifestyle	Scenery	Work-life balance	Culture & people
Technology	70.9%	63.2%	47.6%	38.8%
Engineering	64.9%	50.4%	54.0%	26.7%
Healthcare	58.0%	48.9%	51.1%	38.6%
Finance	76.8%	62.1%	51.6%	31.6%
Education	73.8%	57.1%	42.9%	32.1%
Government	60.2%	50.6%	56.6%	33.7%
Manufacturing	66.4%	39.8%	54.7%	33.6%

6.4 The consistent winners: lifestyle, nature, and work-life balance

Regardless of where respondents come from or what they do for a living, three factors dominate New Zealand's pull proposition: lifestyle and quality of life, scenery and natural environment, and work-life balance. These are not categories that New Zealand can manufacture or manufacture differently, they are genuine, defensible competitive advantages that the country has built over many decades.

What this data suggests is that New Zealand does not need to reinvent its pitch. The foundation of its appeal is solid and stable. What it does need to do is build on that foundation, bridging from lifestyle aspiration to career confidence, from 'I would love to live there' to 'I believe I can build a career there'. That bridge-building is the work that sits behind the barrier data in Chapter 7.

Chapter 7
What holds people back

Chapter 7

What holds people back

The pull factors in Chapter 6 tell us what New Zealand has going for it. This chapter tells us what is standing between aspiration and action. Respondents were asked to select up to three concerns about moving to New Zealand. Their answers reveal a barrier landscape that is both familiar and addressable, if New Zealand chooses to address it.

7.1 Top concerns overall, wave-on-wave

A note on comparability before the analysis begins. Between Q4 2025 and Q1 2026, the visa concern was split into two separate items: 'Visa complexity/process' and 'Uncertainty about eligibility'. These had previously been captured together as 'Visa & immigration process'. For the purposes of wave comparison, the two Q1 2026 items are presented separately (reflecting how respondents actually experienced the question) and also combined (for like-for-like comparison with Q4 2025).

With that caveat in place: visa and immigration complexity remains the single most cited concern in both waves, by a clear margin. In Q4 2025, 63.2% of respondents cited it as one of their top three concerns. In Q1 2026, 54.3% cited 'Visa complexity/process' and a further 38.4% cited 'Uncertainty about eligibility', giving a combined rate of 92.7% when counted across respondents who selected either. Even allowing for the double-counting inherent in that combined figure, the visa and immigration category clearly retains its position as the dominant barrier.

Cost of living holds steady in second place: 51.0% in Q4 2025, 51.4% in Q1 2026. It is one of the few barriers that did not shrink between waves, suggesting it is either a structural concern or (more likely) one that is growing in salience as global awareness of New Zealand's housing and cost environment increases.

Housing, which was third in Q4 2025 at 34.7%, fell to fifth in Q1 2026 at 30.3%, overtaken by the newly separated 'Uncertainty about eligibility' category. Salary levels held broadly flat at 32.5% and 31.0% respectively. 'Not sure what opportunities exist' (essentially an information gap) fell meaningfully from 30.5% to 26.0%, which may reflect better awareness generated by the first survey wave and associated outreach.

Table 7.1: Top concerns, wave-on-wave comparison

Concern	Q4 2025 (%)	Q1 2026 (%)	Change (pp)
Visa & immigration (combined Q4 / split Q1)	63.20%	54.3% + 38.4%	n/a
Visa complexity / process (Q1 only)	n/a	54.30%	n/a
Uncertainty about eligibility (Q1 only)	n/a	38.40%	n/a
Cost of living	51.00%	51.40%	0.4
Housing	34.70%	30.30%	-4.4
Salary levels	32.50%	31.00%	-1.5
Not sure what opportunities exist	30.50%	26.00%	-4.5
Distance from home / global hubs	21.80%	19.40%	-2.4
Economic outlook	15.80%	13.40%	-2.4
Healthcare capacity	10.60%	9.10%	-1.5

7.2 Visa and immigration: the stubborn number one

The visa and immigration barrier is the most important finding in this report. It is the only thing that sits between New Zealand and a very large pool of people who want to be there. It ranked first in Q4 2025. It ranked first (in two forms) in Q1 2026. It is not trending down meaningfully. And it crosses every nationality and every sector.

The splitting of this concern into two distinct items in Q1 2026 ('visa complexity' and 'uncertainty about eligibility') is analytically valuable because it reveals that the problem has two distinct dimensions. Complexity is a process problem: the visa system is perceived as difficult to navigate. Uncertainty is a knowledge problem: people do not know whether they would even qualify. These require different interventions.

Complexity calls for genuine simplification of the pathway architecture. Uncertainty calls for better communication, clearer eligibility information, and active guidance for different professional profiles.

The September 2025 changes to the Skilled Migrant Category, described in Chapter 2, are a step in the right direction, but the data suggests that awareness of these changes has not yet translated into reduced concern. Communications about immigration reform are not reaching the people they are designed to reassure. That gap is actionable.

> The visa complexity problem is real. But 38% of respondents cited uncertainty about eligibility, meaning they do not know whether the rules apply to them. That is not a policy problem. That is a communication problem, and it can be solved.

7.3 Cost of living and housing, a growing shadow

Cost of living is the most persistent barrier in the dataset. Unlike most other concerns, it did not improve between waves, holding at just over 51% in both surveys. This consistency is significant: it suggests the concern is structural rather than perceptual, and that it is not being softened by positive sentiment toward New Zealand in other areas.

Auckland's housing affordability challenges are well-documented domestically. What is perhaps less appreciated is how those challenges read internationally. For professionals from India or the Philippines (where salaries are lower in absolute terms) the prospect of paying Auckland or Wellington rents on New Zealand wages presents a real financial calculation, not just a vague concern. For Americans or Brits, by contrast, the comparison looks different: New Zealand's major cities are expensive by local standards but not necessarily by the standards of London or San Francisco.

Housing fell from third to fifth place between waves, dipping from 34.7% to 30.3%, which may reflect an improvement in the information available to respondents about housing options beyond the main centres, or simply a compositional shift in the respondent pool. Either way, cost of living and housing together remain a formidable double barrier for a significant proportion of the audience.

7.4 Salary expectations and the opportunity visibility gap

Salary levels (31.0% in Q1 2026) and 'not sure what opportunities exist' (26.0%) are closely related concerns, both pointing to a fundamental information asymmetry about what the New Zealand job market can offer internationally.

The salary concern is partly a data problem. New Zealand salaries in technology and engineering are competitive by some regional comparisons but lag behind major US, UK, and Australian markets for senior roles. Respondents who have researched the market (particularly those from high-earning US technology roles) can easily find themselves discouraged by what appears on paper to be a step down in earnings, without the full picture of lower cost of living, different tax structures, and quality of life premiums.

'Not sure what opportunities exist' declining from 30.5% to 26.0% between waves is one of the more encouraging movements in the barrier data. It suggests that the first wave of survey activity and associated outreach may have improved the information environment slightly.

But at 26%, this remains a top-five concern, a meaningful share of interested professionals who simply do not know enough about the New Zealand job market to feel confident taking the next step.

7.5 Country-specific friction points

The barrier profile varies meaningfully by nationality, and these differences have direct implications for how New Zealand tailors its talent attraction messaging by market.

United States – eligibility uncertainty leads

American respondents are most preoccupied with whether they would qualify: uncertainty about eligibility tops their concern list at 46.6%, above even visa complexity (50.0%). They also show elevated salary concern (36.2%) and opportunity visibility gap (36.6%), both well above the global averages. For a population accustomed to high salaries and abundant job market information, New Zealand's relative opacity on both fronts is a material friction point.

India – cost is king

For Indian respondents, cost of living leads all concerns at 60.2%, making it their most acute worry by a significant margin. Visa complexity follows at 57.4%. Salary levels are also elevated at 36.6%. The financial arithmetic of a New Zealand relocation is the dominant lens through which Indian talent evaluates the proposition and the numbers need to stack up convincingly before intent converts to action.

Philippines – visa and cost are almost equal

Filipino respondents cite visa complexity (65.7%) and cost of living (64.5%) at almost identical rates, the highest scores for either concern of any major market. Uncertainty about eligibility is also elevated at 46.2%. This is a highly motivated audience (recall that 87% are 'very interested' in moving to New Zealand) being held back primarily by practical process and financial barriers. The opportunity cost of not solving these frictions is particularly high here.

Germany – distance is a distinctive concern

German respondents are notable for placing 'distance from home/global hubs' third among their top concerns at 35.0%, the highest of any major market and well above the global average of 19.4%. For European professionals accustomed to short flights to major cities and frequent trips home, New Zealand's geographic remoteness is a real trade-off, not just an abstract consideration. Cost of living leads at 48.7%, followed by visa complexity at 42.7%.

South Africa – visa, cost, and eligibility cluster together

South African respondents have a high-anxiety barrier profile: visa complexity (58.6%), cost of living (58.6%), and uncertainty about eligibility (49.5%) all register above global averages. Housing is also elevated at 36.0%. Given that safety and stability is their top excite factor, this is an audience under real pressure to make the move work, which makes the practical barriers feel more acute, not less.

Table 7.2: Concerns by country of residence (Q1 2026)

Country	Visa complexity	Uncertainty eligibility	Cost of living	Salary levels	Housing	Opps gap	Distance
Global avg	**54.30%**	**38.40%**	**51.40%**	**31.00%**	**30.30%**	**26.00%**	**19.40%**
United States	50.00%	46.60%	44.90%	36.20%	20.90%	36.60%	26.00%
India	57.40%	33.30%	60.20%	36.60%	28.70%	22.70%	13.40%
Philippines	65.70%	46.20%	64.50%	28.40%	31.40%	21.30%	12.40%
United Kingdom	46.60%	39.70%	44.00%	31.00%	33.60%	21.60%	22.40%
Germany	42.70%	27.40%	48.70%	32.50%	29.90%	20.50%	35.00%
South Africa	58.60%	49.50%	58.60%	27.00%	36.00%	26.10%	18.90%
Nigeria	58.50%	36.20%	48.90%	23.40%	24.50%	20.20%	21.30%
Canada	34.10%	32.90%	57.60%	32.90%	35.30%	18.80%	16.50%

Key: Relative score compared to global average

← Below global average   Above global average →

7.6 Sector-specific friction points

Sector shapes the barrier profile somewhat less dramatically than nationality, but there are meaningful differences worth noting, particularly for Healthcare and Finance, which show the highest visa concern rates of any sector.

Healthcare professionals cite visa complexity at 63.6%, the highest of any sector, and uncertainty about eligibility at 40.9%. This likely reflects the additional layers of registration and qualification recognition that healthcare workers face when moving internationally, on top of the standard visa process. For a sector where New Zealand has real and urgent workforce shortages, this is a friction point that deserves targeted policy attention.

Finance professionals follow closely with visa complexity at 62.1% and uncertainty about eligibility at 43.2%, the highest eligibility uncertainty score of any sector. They also show an elevated 'not sure what opportunities exist' figure at 30.5%, suggesting that the finance sector's NZ career market is particularly opaque to international talent. Given New Zealand's ambitions in financial services and fintech, this visibility gap is a missed opportunity.

Education professionals have cost of living as their top concern at 60.7%, the highest cost concern of any sector. This likely reflects the salary reality: education professionals in New Zealand earn competitively by local standards but below the levels that some internationally mobile educators may have encountered in premium markets. The 'not sure what opportunities exist' figure for education is also elevated at 38.1%, suggesting poor international awareness of New Zealand's teaching and academic job market.

Technology and engineering professionals, while sharing the global pattern of visa and cost concerns, show broadly average barrier profiles, suggesting that for NZ's largest respondent group, the barriers are well-understood and consistent with global expectations rather than NZ-specific friction points.

Table 7.3: Concerns by sector (Q1 2026, top 5 concerns per sector)

Sector	Visa complexity	Uncertainty eligibility	Cost of living	Salary levels	Housing	Opps gap
Technology	53.10%	38.50%	50.70%	31.90%	31.50%	22.80%
Engineering	54.60%	33.80%	51.50%	34.00%	26.50%	22.30%
Healthcare	63.60%	40.90%	54.50%	27.30%	34.10%	20.50%
Finance	62.10%	43.20%	52.60%	24.20%	26.30%	30.50%
Education	45.20%	38.10%	60.70%	28.60%	32.10%	38.10%
Government	51.80%	44.60%	53.00%	33.70%	32.50%	24.10%
Manufacturing	55.50%	32.80%	56.20%	28.90%	38.30%	20.30%

The barrier picture is, in many ways, more actionable than the pull factor picture. New Zealand's lifestyle appeal is already there. It does not need to be built. What it needs is for the practical pathway to be made clearer, more accessible, and better communicated. The visa system, the cost of living narrative, and the salary and opportunity visibility gap are all areas where deliberate intervention can shift the data. And the next two chapters show that at least some of the talent in this survey is already very close to the tipping point.

Chapter 8

The United States, a market in motion

Chapter 8

The United States, a market in motion

No single market in this dataset tells a more interesting story than the United States. Between Q4 2025 and Q1 2026, the number of American respondents rose from 187 to 470, a 151% increase that is well above the overall survey growth rate of 116%. Their sentiment shifted dramatically. And the external context around why Americans are considering leaving their country makes this one of the most consequential chapters in the report.

We have given the United States its own dedicated chapter because the scale of the shift, and its implications for New Zealand, warrants the depth. This is not just a rising market. It is a market that may be entering a structurally different relationship with the idea of international relocation.

8.1 The numbers: a dramatic sentiment shift

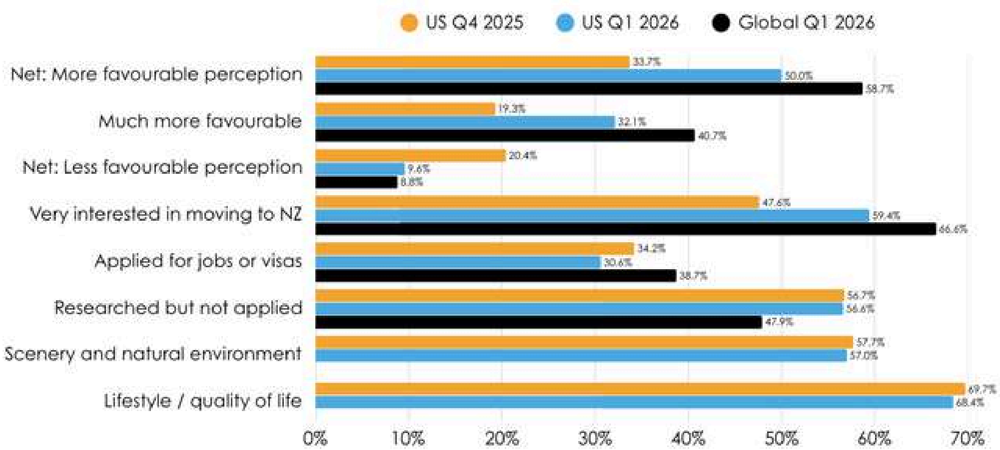
In Q4 2025, American respondents were the most equivocal of all major markets. Just 33.7% said their perception of New Zealand had become more favourable, well below the global average of 49.9%. The single largest response category for American respondents was 'about the same' at 46.0%. Nearly one in five said their view had become less favourable.

By Q1 2026, that picture had transformed. The proportion of American respondents saying their perception had become more favourable rose to 50.0%, a 16.3-percentage-point increase. 'Much more favourable' alone jumped from 19.3% to 32.1%, while 'much less favourable' collapsed from 7.0% to 1.7%. In a single survey cycle, Americans moved from being the most sceptical large market to being broadly in line with the global average.

The interest data tells a similar story. In Q4 2025, 47.6% of American respondents described themselves as 'very interested' in living and working in New Zealand, the lowest 'very interested' figure of any major market. By Q1 2026, that had risen to 59.4%, a 11.8-point jump that represents one of the largest single-market movements in the dataset.

> American respondents rating NZ as 'much more favourable' jumped from 19.3% to 32.1% in a single survey cycle. No other large market showed comparable movement in either direction.

Figure 8.1: US respondent sentiment, wave-on-wave vs global average



8.2 What's driving American interest in New Zealand

The survey data does not ask respondents why their perception has changed, but the external context of early 2026 offers a clear interpretive framework. The convergence of political, social, and economic forces in the United States during this period created conditions that are structurally favourable for New Zealand's talent attraction proposition in a way that has rarely existed before.

Political and social climate

The return of Donald Trump to the White House in January 2025 triggered what Brookings Institution researchers described as the first negative net migration balance for the United States since 1935. Americans began leaving in measurable numbers: approximately 10,000 to Ireland alone in 2025, double the prior year's figure; more Americans moved to Germany in 2025 than vice versa; record applications for British and Irish passports were recorded. Tax lawyers and immigration advisers reported surging enquiries from Americans exploring their options.

The political climate appears to be doing something that New Zealand marketing campaigns could never achieve alone: making international relocation feel urgent, rather than aspirational, for a meaningful segment of the American professional class. The 21% of Americans who told Gallup they wanted to leave (up from 17% in 2023) represents a pool of perhaps 50 to 70 million people. Even a small fraction of that group converting to active consideration represents an extraordinary opportunity for New Zealand.

New Zealand's specific appeal to Americans

For Americans considering their options, New Zealand offers a combination of attributes that few other destinations can match. It is English-speaking with a familiar legal tradition. It has a stable, functioning democracy that ranks highly on global governance indices. It is geographically remote from the centres of political conflict, a feature that, in the current climate, reads as a benefit rather than a drawback. And it has a cultural character: laid-back, direct, egalitarian, that resonates with the progressive professional class that forms the core of the current emigration movement.

The data bears this out. American respondents score culture and people at 48.5%, the highest of any major market and 14 points above the global average. For Americans, it is not just the mountains that are drawing them in. It is the people and the way of life they represent.

Tech talent: the dominant American profile

The sector profile of American respondents is heavily skewed toward technology: 285 of 470 Q1 2026 US respondents (60.6%) identified as working in tech, well above the global tech share of 45.5%. This matters because tech workers are among the most geographically mobile of any professional group, often work with globally distributed teams already, and are disproportionately represented in the demographic most likely to be considering leaving the US for political and social reasons. New Zealand's emerging technology sector (and its genuine shortage of senior tech talent) creates a direct alignment between what American workers want to offer and what New Zealand needs.

8.3 The unique barriers American talent faces

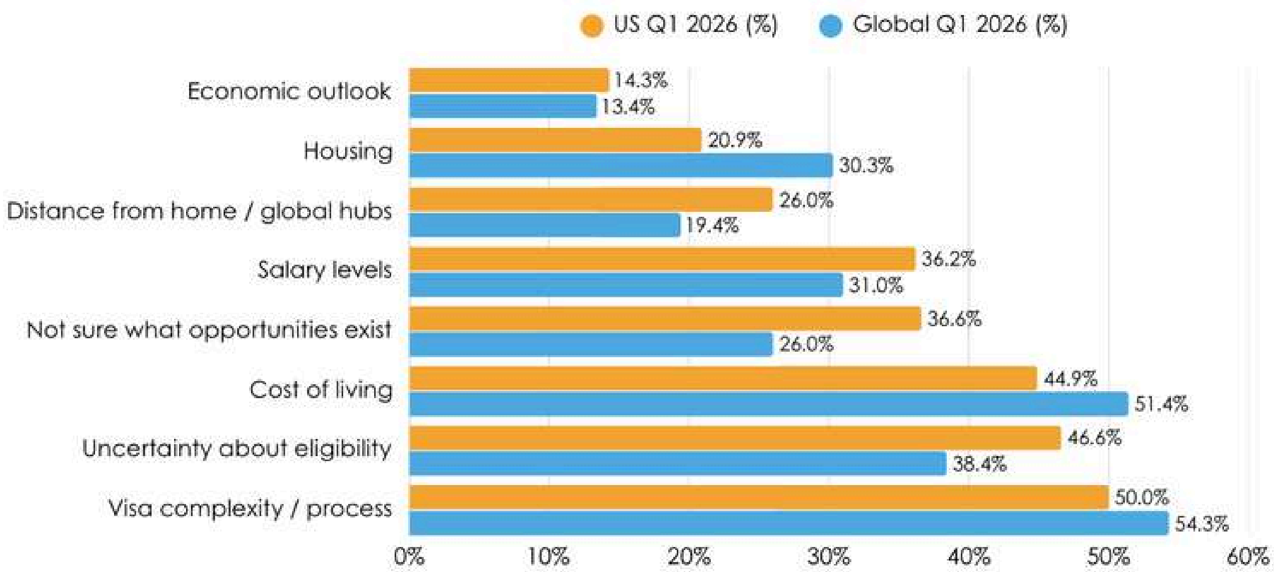
Despite the significant shift in sentiment, American respondents face a barrier profile that is distinctive in important ways and understanding it is essential to converting their growing interest into actual arrivals.

Uncertainty about eligibility is the leading unique concern for Americans, cited by 46.6%, the highest of any major concern category for this group and well above the global average of 38.4%. This reflects a genuine information gap: Americans are less familiar with New Zealand's immigration system than, say, British or Australian nationals who have historically engaged more with the Trans-Tasman pathway. Many American professionals simply do not know whether they would qualify for a skilled migrant visa, what the process would look like, or what it would cost.

Salary levels concern 36.2% of American respondents, compared to 31.0% globally. This is the market most likely to be comparing New Zealand salaries with the elevated compensation packages available in US technology hubs. Senior tech roles in San Francisco or New York routinely pay multiples of what equivalent positions offer in Auckland. For American professionals at that level, the lifestyle premium needs to be very clearly articulated to make the numbers feel worthwhile.

'Not sure what opportunities exist' at 36.6%, also above the global average, underlines the information asymmetry problem. New Zealand employers are largely unknown brands to most American professionals. Without visible employer presence, active recruitment, or credible peer networks of Americans already living and working in New Zealand, the opportunity landscape remains invisible.

Figure 8.2: US respondent barrier profile vs global average (Q1 2026)



8.4 The opportunity for New Zealand

The American market represents arguably the single largest untapped opportunity in New Zealand's international talent attraction strategy. The conditions that are driving American interest (political instability, social polarisation, the search for a different kind of life) are structural forces that will not reverse quickly. And New Zealand's competitive position in the English-speaking world makes it a credible alternative in a way that, say, Germany or Japan cannot be for most American professionals.

But the window is not unlimited, and New Zealand is not the only destination competing for this audience. Canada, Ireland, Portugal, and the UK are all actively marketing to the same cohort. What distinguishes New Zealand is the combination of distance (which self-selects for genuinely committed movers) and a quality-of-life proposition that most other destinations cannot match. The country that wins serious American movers will be the one that makes the eligibility and opportunity picture clearest, fastest.

Three practical priorities emerge from the data. First: targeted eligibility communications for the American market, making it simple for a US tech professional to understand whether they qualify and what the pathway looks like. Second: employer visibility. American professionals need to see New Zealand companies actively recruiting, with real role descriptions and competitive (in context) compensation packages. Third: peer networks. Americans who have already made the move are the most credible voice for this audience. Growing and amplifying those networks is high-return activity.

> American professionals are not asking whether New Zealand is a good place to live. They already know the answer. They are asking whether they can get in, whether there is a job for them, and whether the money will work. Answer those three questions clearly, and the market opens.

Chapter 9
New in Q1 2026

Chapter 9

New in Q1 2026

The Q1 2026 survey introduced two questions that did not appear in the original Q4 2025 wave. Both were designed to probe dimensions of talent attraction that the first survey had left unexplored: whether remote work might serve as a bridge to physical relocation, and which competing destinations were in play alongside New Zealand. The responses to both questions are among the most practically actionable findings in this report.

9.1 Remote work as a bridge: an overwhelming yes

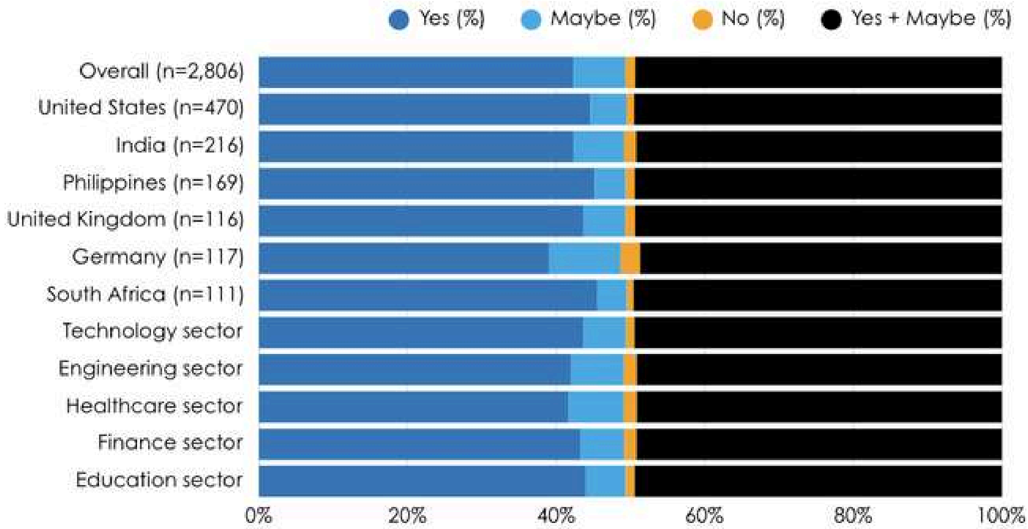
Respondents were asked: 'Would you consider working for a New Zealand employer remotely before relocating?' The answer was unambiguous. 83.6% said yes. A further 13.7% said maybe. Only 2.7% said no outright. Aggregating the definite and probable responses, 97.3% of respondents are either open to or actively interested in remote work as a precursor to physical relocation.

This is one of the most strategically significant findings in either wave of the survey. It suggests that the population of potential talent available to New Zealand employers is far larger than the population willing to relocate immediately. For every person who is ready to pack up and move, there are multiple others who would engage with a New Zealand employer, build a relationship with the organisation and the country, and convert to relocation over time, if that option were available.

The global normalisation of remote work since 2020 has made this model both technically feasible and culturally normal. Professionals across markets are accustomed to working across time zones, collaborating with distributed teams, and evaluating employers through extended digital relationships rather than a single in-person interview. New Zealand's time zone (which aligns reasonably well with Asia-Pacific markets during business hours and provides overlapping windows with parts of Europe and the Americas) is a practical enabler of this model, not a barrier to it.

> 97.3% of respondents are open to working remotely for a New Zealand employer before physically relocating. That is not a niche preference. That is a near-universal signal that the pathway exists. New Zealand has not yet built it.

Figure 9.1: Remote work openness, overall and by key market (Q1 2026)



What this means in practice

Germany is the only major market where the 'yes' rate falls meaningfully below the global average at 76.1%, though even here the combined yes-and-maybe figure sits at 94.9%. The slightly lower enthusiasm among German respondents may reflect that population's historically higher preference for physical colocation and its elevated concern about distance as a barrier.

South Africa shows the highest definite 'yes' rate at 90.1%, closely followed by the Philippines at 89.3% and the United States at 88.3%. The markets with the most urgent motivations to relocate (South Africa and the Philippines) are also the most enthusiastic about any pathway that makes the transition possible, including a remote-first model. American professionals, driven by political and lifestyle motivation, show similarly high openness.

For New Zealand employers and policymakers, the implication is clear. A deliberate remote-first talent pipeline, where New Zealand companies actively recruit internationally for remote roles, with a relocation pathway built in, could unlock a substantially larger pool of engaged, committed talent than traditional 'relocate first, work later' models. The infrastructure for this model (remote work norms, digital collaboration tools, existing expatriate communities) already exists. What is needed is the strategic will to build the programmes around it.

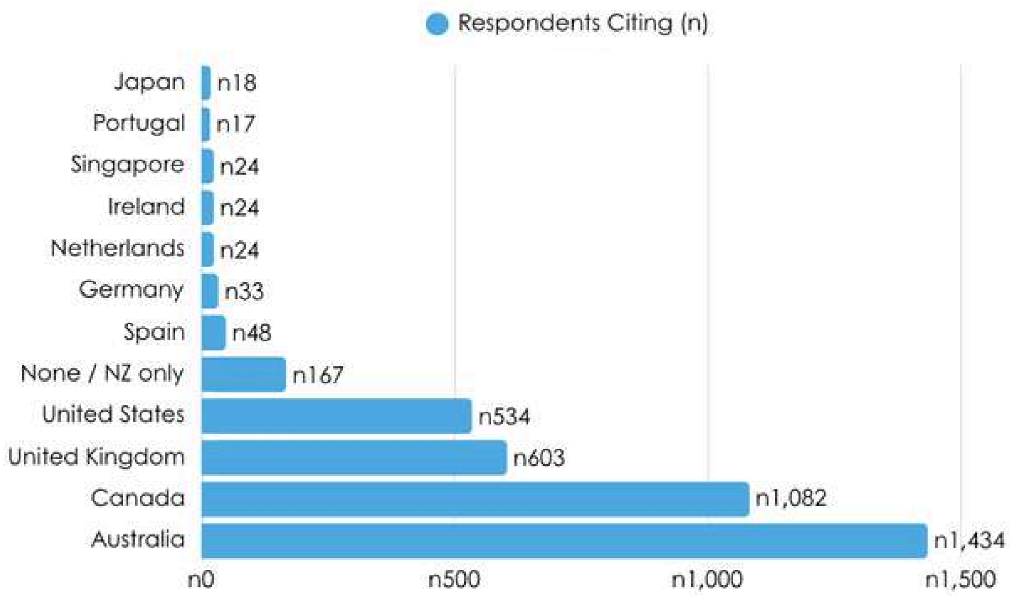
9.2 The competition: who else is in the running?

The second new question asked respondents which other countries they are currently considering alongside New Zealand. This is perhaps the most strategically useful data in the survey for understanding New Zealand's competitive positioning. Not just how people feel about New Zealand in isolation, but where it sits in a consideration set.

The answer is dominated by two names. Australia was cited by 1,434 respondents, representing 51.1% of the Q1 2026 analytical sample. Canada was cited by 1,082 respondents (38.6%). Together, these two countries were named by close to three-quarters of the respondent pool, making them by far the most common alternatives to New Zealand in the consideration set. The United Kingdom was third at 21.5% (603 respondents), followed by the United States at 19.0% (534 respondents).

Beyond the top four, no other single destination was cited by more than 2% of respondents. Spain (48), Germany (33), Ireland (24), Singapore (24), the Netherlands (24), Japan (18), and Portugal (17) all appear, but at volumes that reflect niche preference rather than systematic competition.

Figure 9.2: Competing destinations cited alongside NZ (Q1 2026)



The Australia question

Australia's dominance of the competing destination data is the single most important competitive intelligence finding in this survey. It is not surprising, Australia and New Zealand share a migration zone, a common professional recognition framework for many occupations, geographic proximity relative to other options, and a broadly similar lifestyle proposition. For most of the markets in this survey, if you are considering New Zealand, you are also considering Australia. They are often evaluated side by side.

This creates both a challenge and an opportunity for New Zealand. The challenge: Australia has a larger economy, more jobs, higher average salaries, and arguably a more internationally visible tech and finance sector. The opportunity: New Zealand offers a distinctly different (and in several important respects, superior) lifestyle proposition. Smaller cities, less traffic, lower crime, closer to nature, and a social culture that many respondents describe as warmer and more genuine. The talent attraction task for New Zealand is not to out-compete Australia on professional proposition, but to differentiate clearly on the dimensions where it genuinely wins.

How the competition varies by market

The competitive set shifts meaningfully by country of origin. American respondents prioritise Canada (187 mentions) over Australia (151), reflecting the geographical logic of North American alternatives and Canada's similar political culture. Indian and Filipino respondents overwhelmingly have Australia first (126 and 131 mentions respectively), reflecting Australia's strong presence in those countries' migration conversations. British respondents also show Australia at the top, consistent with the longstanding 'work and travel' relationship between the UK and Australia.

9.3 Implications for New Zealand's talent attraction strategy

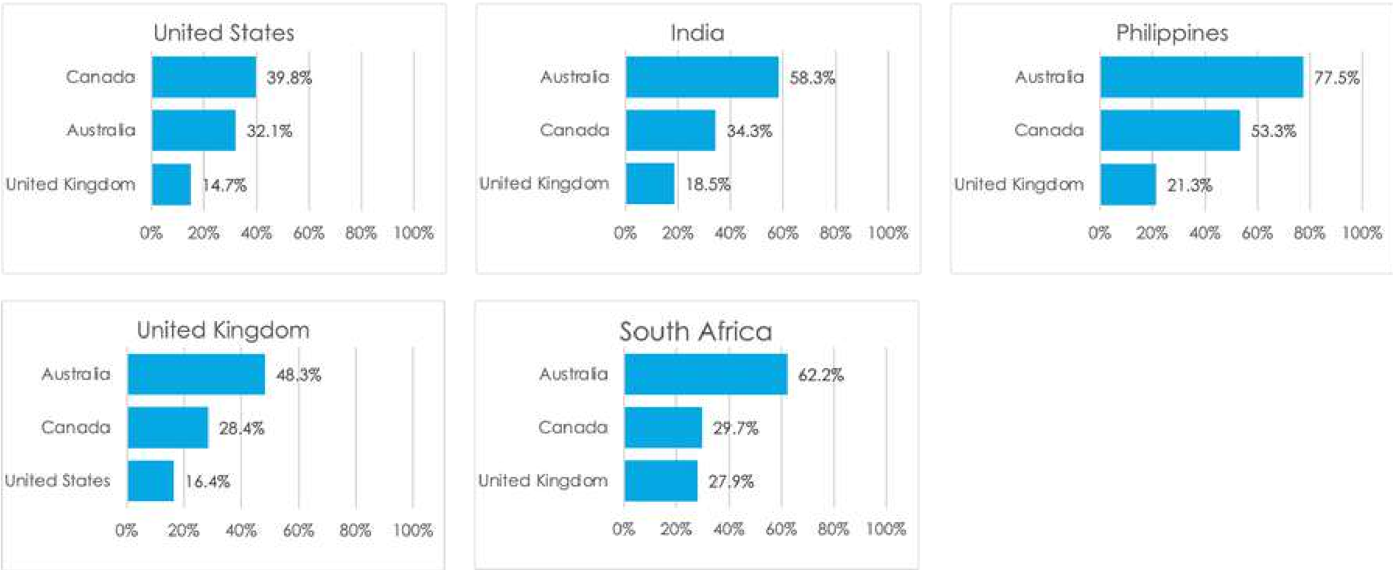
The two new questions in Q1 2026 combine to tell a coherent strategic story.

First: New Zealand is not being evaluated in isolation. It is almost universally being considered alongside Australia, and frequently alongside Canada and the UK. Any New Zealand talent attraction strategy that does not explicitly address and counter those comparisons is working with incomplete intelligence.

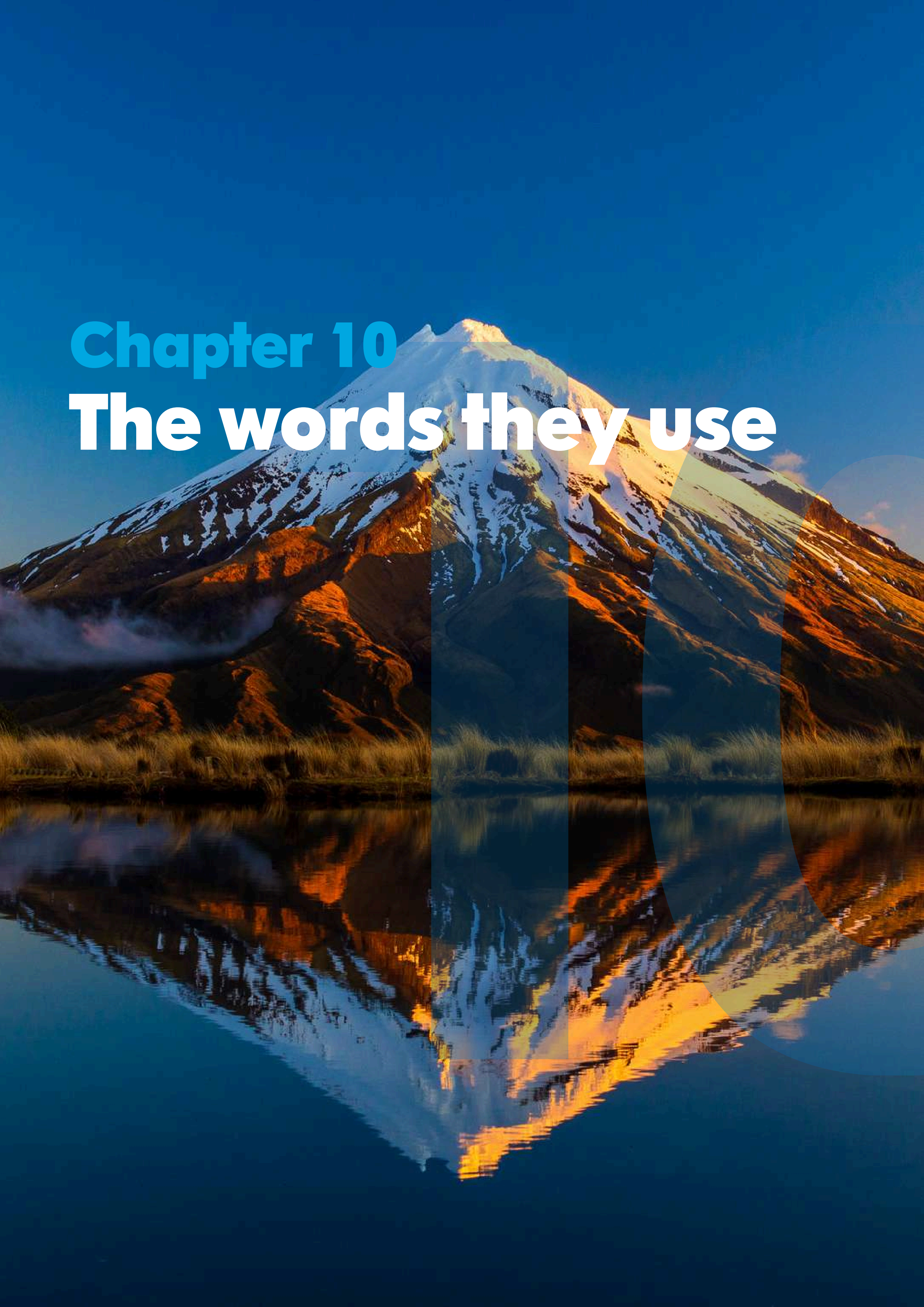
Second: the remote work pathway is a genuine competitive differentiator that New Zealand has not yet fully activated. If Australia, Canada, and the UK are not systematically offering remote-first entry pathways, New Zealand has the opportunity to move first and capture a pipeline of talent that might otherwise remain in the consideration-not-committed category indefinitely.

Third: the 6.0% of respondents who said they are only considering New Zealand, and not any other country, represent a small but highly committed audience. Understanding what drove that singular focus and building the pathways that convert the broader 94% comparison-shopping audience into arrivals, is the work of a sustained, well-resourced talent attraction programme.

Table 9.3: Competing destinations by country of origin (Q1 2026, top 3 per market)



Chapter 10
The words they use



Chapter 10
The words they use

Numbers tell you what. Words tell you why, and how. The Still in Sight survey includes qualitative elements that sit alongside the structured multiple-choice questions: a request for three words that come to mind when thinking about working in New Zealand, and a single sentence on what New Zealand could do to attract more talent. Both are rich sources of insight that quantitative analysis alone cannot replicate. This chapter analyses both.

10.1 Top word associations, working in New Zealand

Respondents were asked to share the three words that come to mind when they think about working in New Zealand. Across thousands of individual responses, the patterns that emerge are striking in their consistency and in what they reveal about the nature of New Zealand's brand in the minds of global talent.

The dominant cluster of words across both waves centres on three interconnected ideas: balance, life, and nature. 'Balance' is the single most frequently used word in both Q4 2025 (202 mentions) and Q1 2026 (568 mentions). 'Life' follows in second place. 'Nature' is third. Together, these three words encapsulate the core of what New Zealand means to globally mobile professionals: a place where life is balanced, where the natural world is close and central, and where the relationship between work and everything else feels fundamentally different.

The next tier of words deepens the picture. 'Opportunity' and 'opportunities' together are among the most common, a positive signal that career potential registers as part of the word association, even if it does not dominate. 'Peace' and 'peaceful' appear consistently, suggesting that for many respondents, New Zealand carries connotations of calm and stability that go beyond just physical environment. 'Safety' and 'safe' form another cluster. 'Friendly' and 'culture' reflect the social dimension of New Zealand's appeal.

Notably, between Q4 2025 and Q1 2026, two words gained significant ground. 'Growth' rose from a minor mention to the ninth most common word in Q1 2026 (120 mentions), a signal that career development and professional opportunity are becoming more salient in how this audience thinks about New Zealand. 'Stability' also emerged more prominently (102 mentions in Q1 2026), appearing for the first time in the top twenty and likely reflecting the global instability that characterised the period between surveys. 'Adventure' made the top twenty in Q1 2026 (94 mentions), a new entrant that speaks to the growing interest from markets where New Zealand's outdoor lifestyle carries particular resonance.

> The single most-used word to describe working in New Zealand, across more than four thousand responses, is 'balance'. That one word captures New Zealand's entire talent proposition better than any marketing slogan could.

Table 10.1: Top 20 word associations, working in New Zealand (Q1 2026)

Word / Theme		Q4 2025 (mentions)	Q1 2026 (mentions)	Thematic cluster
Balance		202	568	Work-life balance
Life		188	468	Work-life balance
Nature		148	358	Natural environment
Opportunity		114	295	Career & growth
Peace		70	180	Safety & stability
Peaceful		56	147	Safety & stability
Quality		70	146	Quality of life
Beautiful		78	137	Natural environment
Growth		n/a	120	Career & growth
Safety		55	117	Safety & stability
Opportunities		54	116	Career & growth
Friendly		40	113	Culture & people
Culture		39	103	Culture & people
Stability		n/a	102	Safety & stability
Lifestyle		n/a	99	Quality of life
Work-life		46	97	Work-life balance
Good		51	95	General positive
Adventure		n/a	94	Adventure & outdoors
Safe		48	94	Safety & stability
Balanced		n/a	91	Work-life balance

10.2 What talent would tell New Zealand to do differently

The open-ended sentence question, 'In one sentence, what could New Zealand do to attract more talent like you?', produced thousands of individual responses across both waves. Rather than quote individual answers (which would risk over-representing particular voices), the most analytically useful approach is to identify the dominant themes that emerge when the full corpus is examined.

Four themes account for the vast majority of responses. Visa and immigration simplification dominated, appearing in 1,122 of 2,806 Q1 2026 responses, just over 40% of all answers. Opportunity visibility came second, with references to jobs, roles, hiring, and recruitment appearing in 1,031 responses. Salary and compensation competitiveness featured in 157 responses. Remote work pathways were mentioned in 131 responses.

What is striking is the alignment between the quantitative barrier data in Chapter 7 and the qualitative open-ended responses. Respondents are not pointing to obscure or unexpected friction points. They are identifying, in their own words, exactly the same barriers the structured questions reveal. The consistency between the two data streams adds considerable confidence to the findings.

Theme 1: Simplify the visa

The single most common thread running through the sentence responses is a plea for visa simplification. Respondents speak of catch-22 systems, unclear eligibility, bureaucratic complexity, and the gap between New Zealand's reputation as a welcoming country and the reality of its immigration process. The language is often direct: 'ease the visa process', 'make immigration simpler', 'streamline the pathway'. Several respondents specifically reference the experience of needing to already be in New Zealand to get the experience required to get into New Zealand; a circular logic that frustrates prospective migrants from the outside. The reforms announced for August 2026 address some of this, but the message from this data is that the work is not done, and crucially that existing reforms are not yet being communicated effectively.

Theme 2: Show us the jobs

The second major theme is opportunity visibility. Respondents want to see New Zealand employers, with real jobs, recruiting internationally. They want virtual job fairs, direct access to hiring managers, searchable databases of open roles, and clearer communication of what sectors are actively hiring. The information asymmetry is stark: New Zealand's job market is largely invisible to most of the world's talent, and talented professionals who are interested but uncertain will not take a leap of faith into the unknown. They need evidence that the opportunity is real and accessible. Several respondents referenced the difficulty of finding NZ-specific job boards or understanding which companies are willing to sponsor international talent.

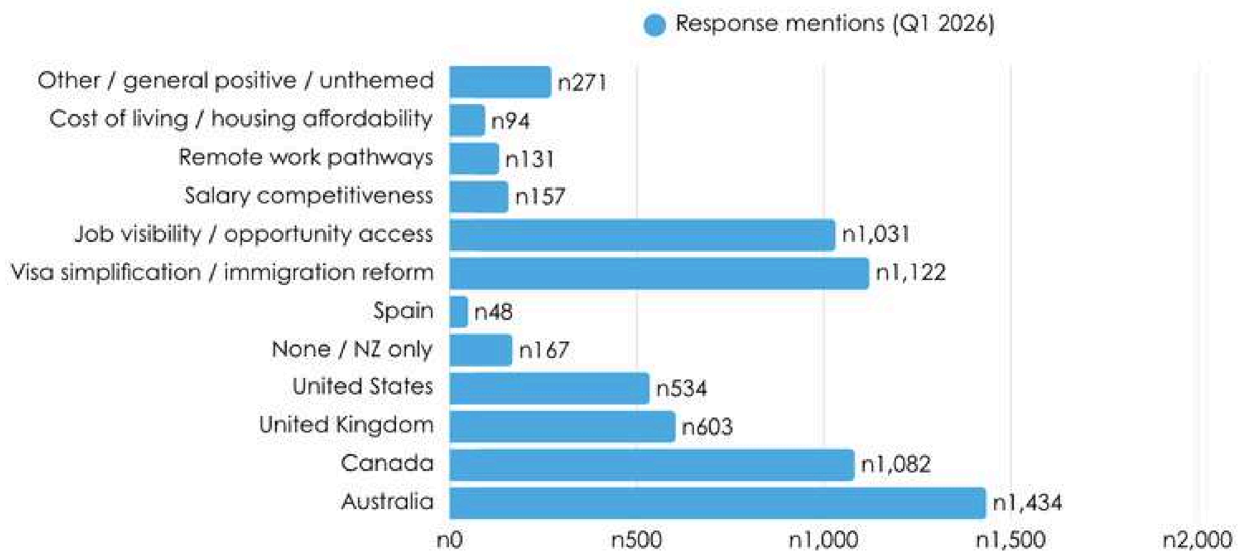
Theme 3: Be more competitive on pay

Salary competitiveness appears in 157 responses, a smaller theme in volume terms, but an important one for the highest-earning segments of the respondent pool. The pattern here is not outrage at low salaries per se, but a request for clarity and competitiveness. Respondents understand that New Zealand salaries are lower than some comparable markets, but they want to see that the gap is acknowledged, contextualised (relative to cost of living and quality of life), and where possible narrowed. Several responses specifically note that salary competitiveness in combination with lifestyle premium is a convincing package, but that the salary piece needs to be visible and competitive enough not to immediately disqualify NZ from consideration.

Theme 4: Open the remote door

The 131 responses mentioning remote work as a pathway to relocation echo the quantitative finding in Chapter 9. Respondents are asking New Zealand employers and policymakers alike to create formal remote-first pathways that allow talent to begin the relationship without requiring an immediate physical move. The language used is practical and specific: 'offer remote opportunities', 'let us work digitally while we sort out the visa', 'remote to start, relocate when ready'. This is not a request for permanent remote work as a substitute for moving, it is a request for a bridge. And the data suggests that most of the people asking for that bridge intend to cross it.

Figure 10.2: Themes in open-ended responses, 'What could NZ do better?' (Q1 2026)



The qualitative data in this chapter does something the numbers alone cannot do: it puts a human voice behind the statistics. These are real people, in real places, thinking seriously about a move to New Zealand. They are not vaguely interested. They are engaged enough to write a sentence about what would make the difference. Listening to what they are saying, and acting on it, is the most direct path from survey data to real talent arrivals.

Chapter 11

What this means for New Zealand

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This final chapter draws the threads together. It is not a summary; each chapter stands on its own for that purpose. What this chapter provides is an interpretive lens: what do two waves of data, read together and placed in global context, actually suggest about where New Zealand sits in the international talent marketplace, and what it should do about it?

We close with appropriate humility about the data. Two survey waves establish a direction, not a certainty. The trends observed here are real and meaningful, but they are early-stage signals rather than confirmed trajectories. With each additional wave of data, the picture will sharpen. For now, the data is directionally clear and the direction is encouraging.

11.1 The emerging trends, with appropriate caveats

Across the four core metrics tracked in both waves, the trajectory is consistently positive. Favourable perception of New Zealand rose from 49.9% to 58.7%. Career opportunity confidence improved from 40.0% to 46.4% (strong/very strong). Interest in moving remained at near-universal levels among the engaged audience, rising from 89.2% to 93.0%. The barrier profile, while persistent, showed modest improvement in several categories.

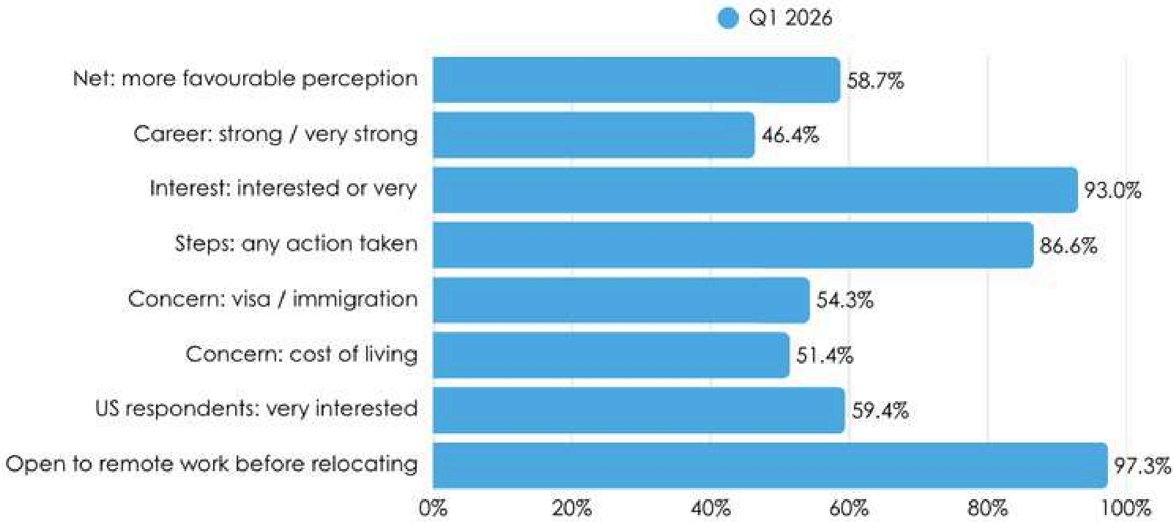
These movements are large enough to be meaningful and consistent enough to suggest a real underlying shift rather than sampling noise. The increases are not concentrated in a single market or sector. They appear across geographies and professional backgrounds, lending them credibility as a genuine directional signal.

The critical caveat is this: the survey captures a self-selected audience that is, by definition, already interested in New Zealand. The trends observed here describe what is happening within that audience, not among the broader global talent population. They tell us that New Zealand's engaged pipeline is warming. They do not tell us how the unconverted majority of global talent thinks about New Zealand. A question that future research should address.

A second caveat concerns the pace of external change. Several of the forces driving favourable sentiment, particularly the political climate in the United States, are inherently volatile. A shift in US political dynamics, an improvement in economic conditions in source markets, or a strengthening of competing destinations' offers could moderate or reverse some of these trends. Two data points, as we have noted throughout this report, establish a direction. They do not guarantee it will continue at the same rate.

> The direction is clear. The magnitude is encouraging. But New Zealand's competitive advantage in global talent attraction is not a permanent feature of the landscape. It is an opportunity that requires deliberate, sustained investment to capitalise on.

Figure 11.1: Summary trend dashboard, key metrics Q4 2025 vs Q1 2026



*Visa concern comparison affected by question split between waves; treat directional change with caution.

11.2 Where the opportunity is sharpest

Not all parts of the global talent market represent equal opportunity for New Zealand. The cross-tabulation analysis throughout this report identifies four areas where the combination of high interest, strong alignment with New Zealand's proposition, and manageable barriers makes the opportunity particularly acute.

The United States: structural tailwind, act now

The forces driving American interest in New Zealand (political instability, social polarisation, the search for a genuinely different way of life) are structural and show no sign of abating. American professionals are not merely curious about New Zealand; a meaningful proportion are actively planning. The barriers they face (eligibility uncertainty, salary perception, opportunity visibility) are all addressable. This is the highest-priority market for dedicated investment in the near term, while the tailwind is blowing.

South and Southeast Asia: high intent, high volume

India, the Philippines, and to a lesser extent Pakistan represent a very large pool of highly motivated talent with strong interest levels. India and the Philippines both show 87% 'very interested' rates in Q1 2026. The barriers here (cost of living, visa complexity) are real but well-understood. What this audience needs is not a different message but a clearer pathway; specific, accessible information about visa routes, salary expectations, and career development that is tailored to their professional profiles and origin markets.

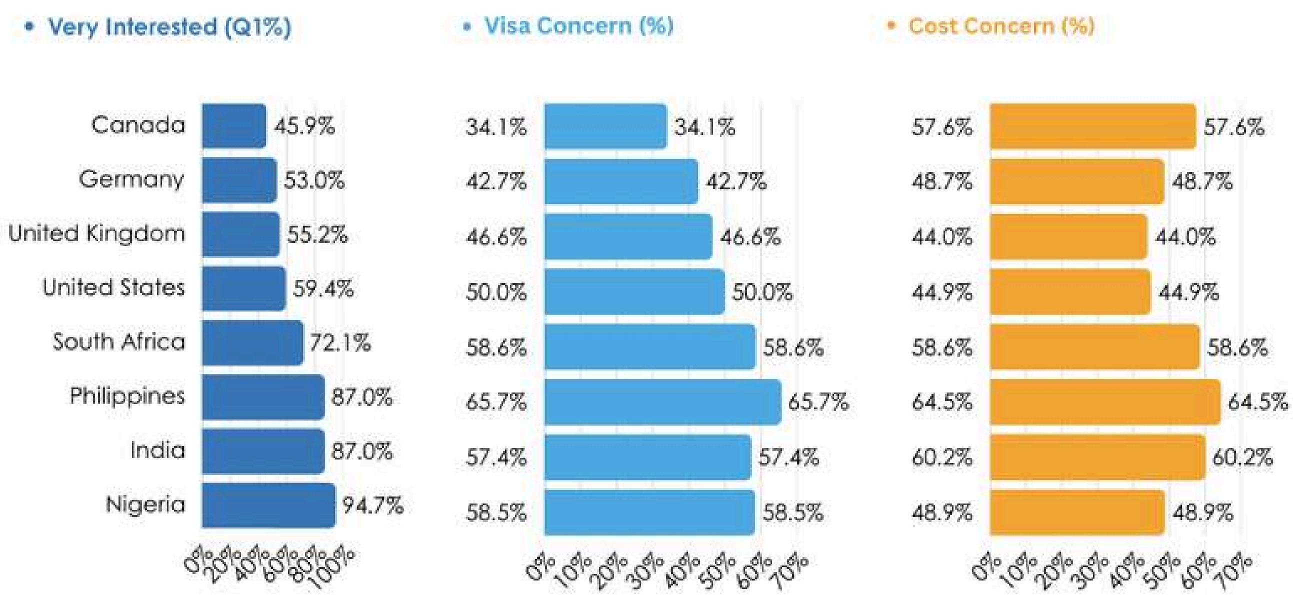
Africa: overlooked and underserved

Nigeria's 94.7% 'very interested' rate is the highest of any market in the survey. South Africa's 72.1% is strong and rising sharply from 56.6% in Q4 2025. Both markets show high safety and stability motivation, strong work-life balance appeal, and a genuine desire to build careers in New Zealand. Yet these markets receive relatively little of New Zealand's international talent attraction investment. The data suggests that a modest, targeted effort here, particularly in Nigeria, which is producing large numbers of internationally mobile technology and engineering professionals, could yield disproportionate results.

The remote work pipeline: across all markets

The 97.3% openness to remote work before relocating is not a market-specific finding. It is a universal signal. Across every nationality and every sector, the appetite for a remote-first entry pathway is near-total. The opportunity here is not about identifying the right market: it is about building the right programme. A formal remote-work-to-relocation pipeline, with employer participation, visa pathway clarity, and active talent outreach, could unlock a pipeline that no amount of traditional talent attraction marketing can replicate.

Figure 11.2: Market opportunity matrix, interest vs barrier intensity (Q1 2026)



11.3 Recommended areas of focus for talent attraction

The data points consistently toward four strategic priorities. These are not new ideas; they are the ideas that the data validates most clearly as the points of maximum leverage.

1. Fix the front door: visa clarity and eligibility communication

The visa barrier is not primarily a policy problem at this point. It is a communication problem. The August 2026 SMC reforms create new, clearer pathways. The immediate priority is ensuring that those pathways are communicated to the right international audiences in language they can understand and act on. This means market-specific guides for the top source countries (US, India, Philippines, South Africa), professional-profile-specific eligibility checks, and direct engagement with the immigration advisers and online communities that globally mobile talent actually uses.

2. Make the jobs visible: employer presence and active recruitment

New Zealand employers are largely invisible in international talent markets. The 26% of respondents who cite 'not sure what opportunities exist' as a barrier are not lacking interest, they are lacking information. The solution is active international employer presence: participation in international virtual job fairs, partnerships with platforms used by globally mobile professionals, and a coordinated effort to help New Zealand employers understand the international talent market and recruit from it. The survey data also suggests that technology employers have a particularly strong opportunity to attract US talent in the current climate, if they are willing to recruit actively.

3. Build the bridge: remote-first talent pathways

97.3% of respondents are open to working remotely for a New Zealand employer before relocating. That number is not an invitation to delay action on relocation pathways. It is an invitation to create a new, complementary one. A formal remote-to-relocate programme, with employer accreditation, clear visa progression, and active outreach to internationally mobile professionals, could create a pipeline that is larger, warmer, and more committed than any cold attraction campaign could generate. Several comparable countries (Estonia, Portugal, Barbados) have demonstrated that purpose-built remote worker programmes can generate measurable talent attraction results in relatively short timeframes.

4. Tell the right story to the right audiences

New Zealand has one overall proposition but multiple audiences, each of which hears it differently. Americans respond to culture, escape, and a genuinely different way of life. South Africans respond to safety and stability. Filipinos respond to career opportunity and family life. Indians respond to work-life balance and professional growth. Germany responds to nature and authentic community. A talent attraction strategy that speaks in a single voice to all of these audiences will underperform compared to one that modulates its message by market, anchored in the same authentic New Zealand story, but told through the lens that resonates most for each specific audience.

A final word

New Zealand has something that very few countries can credibly claim in 2026: a genuine, unforced, universally recognised appeal to the people the world most needs; talented, globally mobile professionals who are actively looking for a better place to build their working lives. The mountains and the oceans and the quality of life are not fabrications of a marketing team. They are real. And the data in this report shows that they are being felt.

What this survey also shows is that feeling is not the same as acting. Between the 93% who are interested and the fraction who arrive, there is a gap that visa complexity, salary uncertainty, and opportunity invisibility conspire to maintain. Those gaps are not features of the New Zealand landscape, they are features of systems and processes that can be changed. And that is the most important thing this report can say: the opportunity is real, the audience is ready, and the barriers are fixable.

End of Report

Still in Sight:
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Q4 2025 to Q1 2026
Produced by Haines
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