



# New Zealand's Tourism Policy Statement

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JUNE 2026

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**New Zealand Government**  
Te Kāwanatanga o Aotearoa



**MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT**  
HIKINA WHAKATUTUKI

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# Ministerial foreword

As the Minister for Tourism and Hospitality, I am pleased to introduce New Zealand's first national Tourism Policy Statement.

At the time of publication, tourism is New Zealand's second-highest export earner and supports one in nine jobs. The Government has set an ambitious goal of doubling the value of New Zealand's exports by 2034. This includes doubling the value of tourism to our economy. When tourism grows, it boosts our economy, creating jobs and opportunities across the country. Achieving this goal will require a New Zealand Inc approach with central government, local government, iwi, communities and industry all working together with a shared purpose.

This Tourism Policy Statement sets out a clear long-term direction for the visitor economy and is intended to endure over successive governments. It translates the Tourism Growth Roadmap into a framework for how tourism is governed, coordinated and invested in over the long-term.

As more visitors choose New Zealand, it is essential that our tourism system is set up for sustainable growth so we can continue to deliver consistent and high-quality visitor experiences. The Policy Statement identifies key actions to enable the whole tourism system to work together to deliver value for both visitors and New Zealanders.

This Policy Statement does not predetermine every future choice, nor does it pre-commit funding. It leaves room for Ministers – now and in the future – to work with partners across the tourism system to set priorities, sequence action and respond to changing conditions.

While tourism has always been one of New Zealand's strengths, its future success will not be accidental. It will depend on clear choices about how we grow, where we invest and how we organise ourselves as a system. The delivery of this Policy Statement will be sequenced through an implementation plan that stages actions, clarifies priorities and timing, and monitors progress.

I invite stakeholders and partners across the tourism system to use this Statement as a shared reference point and to work with Government to translate direction into durable outcomes. Tourism has the potential to become our biggest export earner – we've done it before, and I believe we can do it again when we are united with shared purpose and direction.



A handwritten signature in blue ink, appearing to read 'Louise Upston'.

Hon Louise Upston

**Minister for Tourism and Hospitality**

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# Introduction and purpose

## Tourism that strengthens New Zealand

Tourism and hospitality play a critical role in strengthening and growing the New Zealand economy. At the time of this Statement's publication, tourism is New Zealand's second-largest export earner and provides significant employment with one in nine people being employed in the industry.

Tourism boosts our regional economies, provides great experiences for New Zealanders and international visitors, and showcases the best aspects of New Zealand to the world. Tourism is foundational to building New Zealand's international brand, reputation, relationships, wider trade and investment outcomes and visitor experiences.

Visitor spending helps sustain venues, attractions and activities that visitors and New Zealanders both utilise. In this way, tourism provides tangible benefits to residents and visitors alike by supporting businesses and facilities that might not otherwise be viable.

Whether it is New Zealand's landscapes, our authentic hospitality, or our world-class experiences, the continued growth in visitor numbers and spending underscores tourism's role in achieving our wider economic objectives.



*Mt Ruapehu, Manawatū-Whanganui*

## **Growth that protects New Zealand’s brand and competitive edge**

The Government’s *Tourism Growth Roadmap* sets an ambitious goal of doubling the 2023 value of tourism exports by 2034. In order to do this, we need to create the conditions for sustainable growth and to ensure the tourism system is set up to support this growth in the long term.

For New Zealand, stewarding tourism growth is an opportunity to protect and strengthen our international competitiveness as a destination and the integrity of the brand we take to the world. New Zealand is widely regarded internationally as a safe and welcoming country. Maintaining this reputation is central to our appeal and our competitiveness.

Since we are distant from many markets, we must also consider how well our system settings enable New Zealand to compete with other destinations to secure air and cruise links.

Sustainable growth means ensuring visitation matches regional destination capacity, backed by investment in infrastructure, housing, services and workforce capability. It also means protecting the natural and cultural assets that make New Zealand distinctive – our iconic landscapes and heritage sites, Māoritanga, museums, galleries and festivals. It is essential that what we promote internationally is consistently delivered on the ground. This requires us to protect and continually improve our high-quality visitor experience. We must also maintain community confidence and align decisions across the system so tourism can continue to grow and deliver value to both New Zealanders and visitors alike.

## **Shared direction, clear expectations, coordinated delivery**

This Tourism Policy Statement (the Statement) sets out what the Government seeks to achieve for tourism and how it plans to get there over the next decade. It clarifies priorities, principles and roles for consistent decision-making across the tourism system.

Delivering on this shared direction will require a New Zealand Inc approach – aligning central government agencies, local government, industry, mana whenua and communities around shared outcomes and coordinated delivery.

This Statement sets out eight policy objectives and the key policy actions needed to support them. These actions are not the sum total of government work in tourism going forward. The Statement does not pre-commit any additional funding.

This Statement builds on the *Tourism Growth Roadmap* and the long-term ambition articulated by the tourism industry in *Tourism 2050 – A Blueprint for Impact*, as well as other key industry publications and government strategies.

Accordingly, this Statement focuses on the decisions and trade-offs shaping outcomes, and the settings required for tourism to succeed and maintain confidence over time.

## Tourism is the whole visitor economy

In this Statement, *tourism* is understood as the whole visitor economy. For clarity and continuity, this Statement uses the term 'tourism'. However, it deliberately adopts a visitor economy perspective to guide outcomes.

The visitor economy recognises the full contribution all visitors – international and domestic – make to New Zealand and the value they create across hospitality and accommodation, attractions and activities, events, transport, retail, and placemaking. Together, tourism activities support jobs, attract investment and trade, support regional prosperity, as well as contribute to vibrant towns, cultural expression, and community wellbeing.

This perspective reflects tourism as a system shaped by the combined actions of industry, central government, local government, mana whenua and communities, with each playing a role in delivering high-quality visitor experiences alongside enduring benefits for communities.



*Doubtful Sound, Southland*

# Policy context and strategic direction

The Government's overarching objective is to enable a tourism system which:

- delivers sustained economic value for New Zealand and is attractive for investment
- creates employment for New Zealanders
- supports regional prosperity and more balanced growth
- protects and enhances natural, cultural and social assets
- remains resilient in the face of global and domestic shocks
- maintains public confidence and community support over time, and
- enriches the lives of those who visit and those who live here.

Other cross-government initiatives can support implementation of actions from this Statement. For example, *Amplify*, the Government's creative and cultural strategy, and *Tōnui Māori*, which sets out government actions to support continued iwi and Māori economic growth.

Ongoing work to cut red tape and reduce the burden of regulation will continue to be important for the productivity of tourism and hospitality businesses. Work to reduce domestic transport emissions is also critically important to meet New Zealand's international transport emissions reduction targets as a member of the International Civil Aviation Organization and the International Maritime Organization and will support tourism's resilience to fuel shocks.

To remain competitive, we need to expand our tourism capacity in line with demand and evolving visitor preferences. That means maintaining and improving quality, aligning growth with deliberate capacity-building and investment, and making clear choices about where and how tourism development is supported – not just relying on the market to drive growth.



*Welcome Rock Trails, Southland*

# Roles and responsibilities within the tourism system

Tourism involves many different entities working together.

While the broad roles of central government, local government and industry are generally understood, expectations are not always explicit and responsibility for addressing system-wide issues can be unclear. This can create uncertainty about who to engage, where decisions are made, and how cross-cutting challenges – such as mixed-use infrastructure pressures, workforce capability or community concerns – are resolved.

The purpose of setting out roles and responsibilities in this Statement is to describe how the Government expects the tourism system to operate going forward. It does not assume that these arrangements are consistently in place today.



## Core system roles

The roles below are intended to guide future behaviour and decision-making, including clearer accountability when trade-offs arise.

### Central government

Central government:

- sets the overall strategic direction and priorities for the tourism system
- establishes regulatory and funding frameworks, and determines the deployment of funding for tourism-related programmes and initiatives
- plans and invests in infrastructure that is a function of central government such as roads and Department of Conservation assets
- leads international destination marketing through Tourism New Zealand
- provides education and vocational skills qualifications, and
- supports the attraction of major events and international conferences.

Government has a role in ensuring tourism policy both aligns with and is supported by broader policy objectives including the economy and employment, international trade and investment, border management, infrastructure, conservation, climate, Māori development, and culture. The dispersed levers shaping outcomes in tourism necessitate ongoing coordination across government and between portfolios.

These efforts are also central to maintaining public confidence in how tourism is governed, and how central government can intervene when there are clear market failures or where there are system-wide risks or coordination gaps that individual entities cannot resolve alone. Interventions may also occur where economies of scale or other efficiencies mean outcomes are best achieved through centralised action.

An example of this role in action is central government's leadership of international destination marketing. Through the mandate, expectations and funding provided to Tourism New Zealand, the government ensures New Zealand has a strong global tourism brand to attract international visitors and aligns marketing activity with system outcomes such as dispersal, seasonality and capacity. This centralised destination marketing activity complements the conversion-focused international marketing activity of our large tourism businesses including airlines, cruise operators and hotels.

Another example is central government supporting attraction of major national events and/or coordinating and planning such events, which might require involvement of multiple government agencies (such as border agencies and Police) and local government.

## Note on Department of Conservation

New Zealand's natural environment – a third of which is under the stewardship of the Department of Conservation (DOC) – is a key foundation of our tourism proposition. DOC is a critical actor in the tourism system with lead accountabilities across the central government, local government and industry spheres outlined in the table on pages 16 to 18. It has wide-ranging responsibilities across public conservation land and waters for ecological stewardship, place-based planning, visitor infrastructure and facilities, visitor products, and managing visitor pressures.

A key part of DOC's role is administering tourism concessions on the conservation estate: setting conditions that enable access and high-quality experiences while protecting natural and cultural values.

DOC is also an integral part of industry, developing and delivering nature- and heritage-based tourism products and experiences. DOC delivers these outcomes working in partnership with mana whenua/Treaty partners, local government, community groups, Regional Tourism Organisations (RTOs) and concessionaires, aligning stewardship with access, investment and visitor experience.



*Ulva Island, Southland*

## Local government

Local government's role in placemaking is essential. Events, museums and galleries, public spaces and visitor infrastructure are foundational to tourism.

Local government:

- provides core services such as network infrastructure, public transport, museums, venues and other facilities that are intended to deliver broader community outcomes
- leads place-based planning, destination management, events development and acquisition, and engagement with local communities
- leads domestic destination marketing, and
- owns or invests in tourism facilities like airports, stadiums, galleries, and convention centres.

Local government's overall purpose includes meeting community needs for good-quality local infrastructure and public services and, in doing so, supporting local economic growth and development. Councils address local tourism needs while balancing other local responsibilities and expectations.

The tourism system benefits particularly from local government's priority focus on providing core services such as network infrastructure, public transport, museums, reserves and other facilities. The other important roles it leads include place-based planning, destination management, events development and acquisition, and engagement with local communities. Councils are often closest to the impacts of tourism growth, and they are central to shaping how tourism contributes to local outcomes through placemaking.

In many regions, councils provide funding to RTOs. RTOs are an important part of the tourism system and a critical delivery mechanism at a destination level. They translate strategy into on-the-ground action by coordinating visitor servicing, experience and itinerary development, destination management activity, and regional promotion. RTOs help align the demand and supply sides of the system, strengthen destination propositions, and ensure what is promoted can be credibly delivered by a region.

Local government also plays a leading role in domestic destination marketing of place and events. RTOs, in partnership with Tourism New Zealand and local tourism and hospitality businesses, play a vital role here.

Local government is also a major owner of, or investor in, tourism-connected activities, amenities and infrastructure which are highly reliant on the visitor economy. These include zoos, stadiums, event venues, art galleries, airports and convention centres, among others.

Under the City and Regional Deals initiative, the Government is establishing long-term agreements between central and local government. The deals will unlock funding and resource opportunities to support councils to make improvements in their respective regions. The types of opportunities included in City and Regional Deals will enable local government partners to continue supporting tourism growth, including through events.



## Industry

Industry:

- leads industry strategy
- invests in and develops commercial products and services for visitors including accommodation, hospitality, and tourism-enabling infrastructure (such as visitor accommodation, attractions and activity facilities)
- attracts, retains and upskills its workforce, and
- leads sustainability initiatives in the sector.

Industry is principally responsible for delivering high-quality visitor experiences and responding to changing market conditions or visitor preferences.

Industry associations are key entities within the tourism system. They are important delivery partners for lifting standards and supporting uptake of new approaches within their memberships. Associations also provide advocacy, business intelligence, practical tools and resources, and business capability and training support to help firms adapt and improve performance.

In addition to commercial delivery, industry has lead accountability (often through industry associations and other networks) for several system-critical functions that shape long-term outcomes, including:

- setting and lifting service quality, accessibility and customer experience standards, including through voluntary accreditation, peer learning and continuous improvement
- leading the development of workforce skills priorities and retention initiatives that support a productive, resilient sector
- embedding responsible visitor behaviour across the visitor journey, working with mana whenua and destination partners to reinforce shared expectations (for example through initiatives such as the Tiaki Promise)
- driving the adoption of rapidly emerging technologies, such as artificial intelligence (AI), to leverage their full potential for growth and business productivity gains
- leading the transition to more sustainable and lower-emissions operations, including the adoption of practical, scalable approaches that protect long-term value, and
- providing system intelligence and early warning by aggregating on-the-ground insights on demand conditions, capacity constraints and emerging risks to support timely, proportionate system responses.

Tourism businesses create and market the experiences visitors can buy. They develop market-ready products that build regional propositions, and use pricing, packaging, influence and distribution channels to shape demand. Destination marketing then builds awareness and preference for New Zealand and its regions, while industry-led activity converts that interest into sales through trade, retail and booking channels.

Iwi, hapū and Māori businesses play a distinctive and leading role in expressing culture, kaitiakitanga and place-based identity, and in shaping visitor experiences that authentically reflect Māori values and aspirations.

Transport businesses operating across the aviation, maritime and land transport sectors – airlines, airports, ferries, cruise and port operators, and rental, bus and shuttle businesses – play a key enabling role in international and regional connectivity, visitor flows and system resilience.

## Tourism system roles

### How do these roles fit together?

The table below sets out the intended division of accountabilities going forward, to guide coordination and accountability rather than describe current practice in every location. It reflects a deliberate shift toward clearer industry leadership in areas where outcomes depend primarily on commercial behaviour, operational standards and sector-wide norms, with central government focused on enabling system settings and cross-system coordination.

#### Key

**Lead:** Accountable for driving action and convening others.

**Partner:** Jointly designs/delivers, shares responsibility for outcomes.

**Enable:** Provides settings, tools, funding, guidance, or data that make delivery possible.

Cross-cutting system issue	Central government	Local government	Industry	Comment
<b>Policy, system settings and strategic direction</b>	<b>Lead</b>	Enable	Partner	Central government leads the broader economic strategy, setting overall direction and priorities for the tourism system. Government ensures the tourism system operates effectively to support outcomes for New Zealand and New Zealanders, including, as appropriate, enabling industry strategy.
<b>Tourism industry strategy</b>	Enable	Enable	<b>Lead</b>	Industry leads industry strategy, reflecting sector aspirations and how tourism businesses and organisations will contribute to economic, social, community and environmental outcomes. Local government shapes and delivers destination priorities.
<b>Tourism funding</b>	<b>Lead</b>	Partner	Partner	Central government receives revenue from tourism activity and determines the deployment of funds for tourism-related programmes and initiatives. Local government chooses to invest some rates funding into tourism-related programmes and initiatives.
<b>Domestic marketing</b>	Enable	<b>Lead</b>	Partner	Marketing to New Zealanders to travel and attend events within New Zealand is undertaken by both local government (RTOs) and tourism businesses.

Cross-cutting system issue	Central government	Local government	Industry	Comment
<b>International marketing</b>	<b>Lead</b>	Partner	Partner	Tourism New Zealand is the national tourism marketing agency. This is supported and leveraged by businesses and regions that market internationally.
<b>Place-based planning and destination management</b>	Enable	<b>Lead</b>	Partner	Management of place is an important tourism function that considers the needs for sector growth alongside community need and environmental impacts.
<b>Management of public infrastructure</b>	<b>Lead</b>	Enable	Partner	Central government plans and invests in infrastructure that is a function of central government (eg major roads, DOC assets).
<b>Management of local infrastructure</b>	Enable	<b>Lead</b>	Partner	Local government plans and invests in infrastructure that is a function of local government and primarily intended to deliver broader community outcomes (eg amenities, venues, local roads, waters, parks, seaports, airports).
<b>Product development</b>	Enable	Enable	<b>Lead</b>	Tourism businesses lead the development of commercial products and services for visitors that are both primarily commercial in purpose and supported by private investment or business revenue. Central and local government enable this activity through planning, infrastructure and investment settings.
<b>Education and skills qualification delivery</b>	<b>Lead</b>	Partner	Partner	Central government provides the educational and vocational skill qualifications (secondary school, vocational and tertiary education) required by the tourism, hospitality and events sectors.
<b>Workforce capability and development</b>	Enable	Enable	<b>Lead</b>	Industry has a direct interest in attracting, retaining and upskilling its workforce. This includes recruitment, on-the-job training, career progression, skills development, and engagement in both the development and use of government-provided programmes.

Cross-cutting system issue	Central government	Local government	Industry	Comment
<b>Data and insights</b>	<b>Lead</b>	Partner	Partner	Data and insights for the tourism sector are largely led by central government. The availability of different data and the impact of new technologies are providing new opportunities that need consideration in a coordinated system.
<b>Industry intelligence and early warning</b>	Partner	Partner	<b>Lead</b>	The industry is sensitive to market forces, capability challenges and other risks and is best placed to assess situations and respond. However, it is often reliant on government data and intelligence to inform this work.
<b>International connectivity</b>	Enable	Enable	<b>Lead</b>	International aviation and cruise connectivity is largely dependent on private sector businesses but relies on infrastructure that is enabled by central and local government.
<b>Business sustainability and emissions transition</b>	Enable	Enable	<b>Lead</b>	The industry leads sustainability initiatives in the sector and businesses participate in sustainability programmes.

### Policy actions: System roles and coordination

- **Set clear leadership and accountability across the system.** This Statement clarifies the respective responsibilities of central government, local government and industry in responding to tourism growth pressures, including how decisions and accountabilities interact.
- **Strengthen cross-agency coordination within central government.** Government will coordinate between relevant agencies, where appropriate, to identify risks early, align policy and investment decisions, and avoid duplication. Government will also ensure agencies understand and take account of this Statement, and recognise tourism’s role as a major employer, driver of regional growth, and contributor to New Zealand’s GDP and export earnings. These will include ministries, departments and agencies responsible for tourism and hospitality; border management; economic growth, trade and investment; education, skills and training; immigration and employment; Māori development; conservation; culture, heritage and sport; and our environment, cities, regions, transport and infrastructure.
- **Consider options to strengthen the tourism system.** Government will assess whether current system leadership, coordination and delivery arrangements remain fit for purpose over the long term, and consider options to strengthen them including, where appropriate, the case for new or updated institutional arrangements and/or enabling legislation.
- **Consider policy options for a national destination plan.** Government will consider options for a national destination plan which sets a shared long-term vision and strategic priorities for tourism, with clear targets, measures and reporting expectations. The plan would contribute to economy-wide outcomes, support alignment of national, regional and local objectives, and provide a holistic framework to guide coordinated decision-making, sequence growth and investment, and manage system-wide trade-offs over time.



*Mount Hikurangi, Gisborne*

# Illustrating the system in practice

## Subsector vignette: Cruise tourism

Cruise tourism highlights the importance of system coordination: high demand alone does not deliver strong economic outcomes without effective alignment across government, industry and the wider tourism system. While global cruise tourism continues to grow, New Zealand has recently experienced a persistent decline in cruise visitors and port calls. In the 2025/26 season, New Zealand cruise visitation is just over half the pre-pandemic level. Cruise lines make deployment decisions years in advance and confidence in New Zealand's settings is critical to whether we remain globally competitive.



## Cruise tourism: Predictable settings that lift value

### What success looks like

- Cruise delivers measurable net value to New Zealand across the economy, environment, communities, businesses and visitor outcomes.
- Time in port is used well, lifting spend on local food, beverage, retail, transport and experiences.
- Communities retain confidence that cruise visitation is well managed.

### How the system operates

- **Central government** shapes commercial decisions through border processing, biosecurity requirements, maritime and border charges, and conservation-related permits.
- **Local government and port authorities** manage the onshore interface and commercial agreements, including transport, amenity, waste and public facilities.
- **Cruise industry** responds to cost certainty, scheduling flexibility and the availability of high-quality shore experiences.

### Central government's role

- Strengthen cross-government coordination on settings that affect cruise deployment decisions.
- Improve transparency and predictability of charges and compliance requirements.
- Invest in practical enablers that lift value, including port readiness, shore infrastructure and better data on regional spend.

*When settings are transparent and predictable, and impacts are well managed, cruise can support regional and seasonal dispersal and regional value while maintaining community confidence.*



*Queen Anne, Port of Auckland, Auckland Harbour*



## System vignette: Domestic tourism

Domestic tourism is often overlooked as a background market but plays a distinct and foundational role in the tourism system. Domestic visitation is essential for the wider tourism economy and keeps many regional destinations viable. For many tourism businesses, domestic visitation comprises most of their trade. For the year ended March 2025, domestic tourism expenditure accounted for 61 per cent of total tourism expenditure. It provides a large base of steady demand, less exposed to international shocks, helping businesses, workforces and supply chains remain viable through downturns. A primary lever for domestic tourism is events, incentivising locals to travel within New Zealand.

Domestic travellers also help businesses test new products and itineraries. This helps operators refine quality before scaling to international markets. Because domestic travel tends to be habitual and is more likely to occur across weekends, school holidays and short breaks, it can also be deliberately shaped to support regional and shoulder-season dispersal – particularly when pricing, event calendars and transport connections are aligned.

# Domestic tourism: Stabilising the system and supporting regional economies

## What success looks like

- Tourism businesses have stable, year-round demand, supporting retention of skilled staff and higher service quality.
- Domestic travel supports regional prosperity by growing demand in a wider range of places and distributing spend beyond the main gateways.
- Domestic travellers have opportunities for enriching experiences, such as sports, festivals and cultural events, including the arts, sports, food and beverage, and Māori culture.
- Seasonality pressures are reduced through aligned event programming, targeted offers and improved access in shoulder periods.

## How the system operates

- **Events, sports and culture** are key drivers of domestic tourism and are effective tools to encourage regional and seasonal dispersal. For example, food and wine festivals, concerts and sports fixtures spread through the year offer local economic benefits.
- **Industry** uses domestic demand to trial new formats (micro-events, themed weekends, new guided products), de-risking investment and improving experience design before international expansion.
- **Regional partners and local government** shape dispersal by developing place-based propositions and event calendars, improving local wayfinding and visitor services, and supporting access to nature and amenity in peak and shoulder periods.
- **Central government/Local government** can support events and product innovation providing reasons to travel in off-peak periods (including community events that strengthen social licence and place pride).
- **Central government (through DOC)** coordinates access and visitor facilities on public conservation land (eg tracks, huts, campgrounds and holiday parks) with regional partners.
- **Transport and accommodation settings** influence whether domestic travel supports dispersal. Pricing, availability and booking friction shape short-break travel patterns and the viability of shoulder-season offers. Aviation, maritime and ground transport settings are a key part of this, including air and maritime capacity, frequency and fares on trunk and regional routes, and coordination between industry and destinations to support shoulder-period travel.

## Key challenges

- Domestic travel is highly price-sensitive (cost of living, transport and accommodation pricing), which can reduce demand quickly and limit affordability for families.
- Demand concentrates around weekends, school holidays and peak seasons, creating congestion, workforce pressures and reducing the ability to smooth visitation across shoulder periods.
- Where campaign timing, capacity, product depth and events programming are not aligned, opportunities to smooth demand and support shoulder-season travel are limited. Gaps in data on domestic flows and impacts further constrain effective decision-making.

*Domestic tourism is not only a market segment; it is a system stabiliser and an innovation pathway that can be intentionally shaped to support regional vitality and year-round visitation.*



**Place vignette:  
Aoraki/Mt Cook**

Aoraki/Mt Cook is one of New Zealand's most iconic landscapes and is a Māori tīpuna of deep cultural significance to mana whenua. It attracts high visitor interest and carries strong expectations around environmental integrity, cultural connection, safety and experience quality. At peak times, pressures can concentrate quickly on carparks and roads, visitor facilities, walking tracks, cycle trails and staff capacity. In places like this, long-term value depends less on stimulating demand and more on how well visitation is managed.

# Aoraki/Mt Cook: Protecting value through disciplined visitor management

## What success looks like

- Visitors experience Aoraki/Mt Cook as a world-class, well-managed place.
- Environmental and cultural values are protected alongside access and enjoyment.
- Visitor pressures are anticipated and addressed before they undermine experience or confidence.

## How the system operates

- **DOC** has a core stewardship role and is progressing destination management alongside local government and mana whenua at our highest value and most visited sites on public conservation land, including Aoraki/Mt Cook.
- **DOC, local government and mana whenua** shape the wider place experience through planning, services and community engagement.
- **Industry** influences how visitors move through the place, the experiences they choose, and the standards of behaviour that are normalised.

## Central government's role

- Supports clear visitor settings (for example, access rules, parking management, capacity limits and where appropriate, booking or time-slot systems) that manage peak pressures and protect values.
- Ensures core tourism-enabling infrastructure (including access roads, parking and essential utilities) is fit for purpose to handle expected visitation.
- Enables coordinated decision-making across agencies, rather than fragmented responses.
- Reinforces shared stewardship expectations that protect what makes the place distinctive.

*This vignette illustrates this Statement's intent in practice: growth that is better shaped, better supported and more likely to endure.*



*Aoraki/Mount Cook, Canterbury*

# Policy objectives and actions

This Statement sets out eight policy objectives and the key policy actions needed to support them. It also sets out two sets of stewardship-based actions.

POLICY OBJECTIVES AND ACTIONS								STEWARDSHIP ACTIONS	
1: Evidence-led, sustainable tourism growth	2: Delivering high-quality visitor experiences	3: Tourism that works for regions and communities	4: Productive, resilient tourism and hospitality businesses	5: Strong international and domestic connectivity	6: Creating and shaping demand through targeted and effective marketing	7: Unlocking the value of events and business events	8: Investing for impact and long-term value	System roles and coordination	Implementation, oversight and review
Deliver practical tourism data and insights that industry and government can use	Provide clear, forward-looking signals about priority experience areas	Consider future funding arrangements to enable management of visitor pressures at place and delivery of sustainable tourism growth	Support industry with lifting productivity and international readiness	Work across central and local government and with the aviation, cruise and other transport sectors to increase connectivity	Sustain international demand generation for New Zealand	Undertake a review of the events system to strengthen strategy, coordination and public value	Consider future funding arrangements to enable management of visitor pressures at place and delivery of sustainable tourism growth	Set clear leadership and accountability across the system	Monitor and report on progress and outcomes
For public conservation land, integrate resident sentiment, environmental indicators, and site-level capacity into the shared evidence base	Progress a visitor accommodation strategy	Consider options to improve transparency for short-term rental accommodation	Develop a skilled workforce and business leaders	Provide continued transparency about fee and levy reviews	Better align national and regional marketing	Respond to the findings of the Events System Review with staged actions	Set clearer, enduring investment outcomes, principles and priorities for tourism-related funding, including the International Visitor Conservation and Tourism Levy (IVL)	Strengthen cross-agency coordination within central government	Establish a tourism leadership group to progress implementation
Build shared capability to use tourism insights effectively	Develop a national culinary tourism strategy	Partner with regions to support place-based tourism outcomes	Accelerate practical AI adoption across tourism and hospitality	Negotiate air services agreements to enable more connections	Provide stable, multi-year funding and performance signals to Tourism New Zealand		Publish transparent investment criteria for tourism-related funding, including the IVL	Consider options to strengthen the tourism system	Use this Statement to guide expectations of system entities
	Support Māori tourism as a core element of destination differentiation and authenticity	Embed stewardship for visitor conduct in business practice	Reduce unnecessary regulatory burden on tourism and hospitality businesses	Ensure immigration settings continue to support visitor demand	Use marketing to support dispersal and seasonality		Strengthen evaluation and learning for tourism-related funding, including the IVL	Consider policy options for a national destination plan	Refresh this Statement periodically
	Meet trade and consumer needs for quality assurance		Support industry transitioning to lower-emissions and more sustainable operations	Build a strong and resilient aviation sector	Coordinate marketing campaigns for conservation sites		Explore a cross-government approach to growing investment into tourism, including through foreign direct investment		
	Ensure there is ongoing improvement of service quality and customer experience standards			Build a sustainable and resilient cruise sector	Align demand generation with destination capacity and stewardship				
				Ensure visitors have options for reducing their carbon footprint					

Auckland and North Shore from North Head



An aerial photograph of a river winding through a lush, green forest. A small dam or weir is visible in the middle of the river, with a small red boat floating downstream. The water is a vibrant blue-green color, and the surrounding forest is dense and vibrant green. The image is oriented vertically on the page.

Policy Objective 1

# Evidence-led, sustainable tourism growth

## Evidence and insights enable confident, sustainable tourism growth

A high-performing tourism system requires evidence-led decision-making. Tourism growth that is not guided by shared, credible evidence risks becoming misaligned with visitor capacity and infrastructure readiness, eroding public confidence and undermining long-term value.

### High-quality evidence enables industry, regions, and government to plan and invest with confidence.

While New Zealand holds extensive tourism data, it is not always timely, well-integrated, or easy to use. This can make it difficult to clearly understand trends, demand, capacity and opportunities, increasing risk and limiting well-informed investment and planning decisions across the system.

Tourism doesn't grow evenly. Some places, times of year, and markets see more pressure than others. Clear, well-presented data and insights are required to identify pressure points, anticipate infrastructure and workforce needs and support informed decisions about where, when, and how tourism can grow sustainably.

Government's approach is to strengthen the availability, accessibility, and usefulness of tourism data so it can be consistently applied. Better insights will support industry-led planning and investment, improve government planning and investment decisions, reduce risk, and increase confidence for businesses, regions, and communities.

Rapid advances in technology, including the growing use of artificial intelligence, are changing how visitors discover and experience New Zealand and how tourism businesses and governments plan, operate and invest. These shifts are also expanding the volume, variety and potential value of data available to inform tourism decisions. It is therefore essential that we identify and learn from global best practice, to ensure our approach keeps pace and adopts proven methods for quality, governance and use.

This creates opportunities to improve forecasting, planning and market targeting – supporting more confident decision-making by industry, regions and government. It also raises challenges for how public tourism data is collected, integrated, safeguarded and shared. The way tourism information is shaped and used must support sustainable growth over time while maintaining confidence in the integrity and reliability of New Zealand's tourism data.

To make this work, a partnership approach will be essential. Government, local government, mana whenua and industry will increasingly rely on shared, integrated insights to inform decisions on development, investment and destination management.



*Marlborough Sounds, Marlborough*

### Policy actions: Evidence and insights

- Deliver practical tourism data and insights that industry and government can use.** Government will prioritise producing clear, timely, and actionable tourism data and insights that support industry-led planning and investment decisions, as well as effective government planning, investment, and policy settings.

Areas of focus will include improving how data and insights are presented and shared in accessible, usable formats, and strengthening collaboration between central government, local government, mana whenua and industry to ensure tourism data responds to real decision-making needs across the system. This work will also explore innovative approaches to using AI-enabled data across the tourism system.

Government will also consider more coordinated approaches to tourism data, analytics and insight functions. This may include targeted integration or consolidation to reduce duplication, improve access and ensure the system is well positioned to take advantage of new technologies.
- For public conservation land: integrate resident sentiment, environmental indicators, and site level capacity into the shared evidence base.** Government will ensure that DOC's insights and data are used to inform marketing, destination management and investment sequencing.
- Build shared capability to use tourism insights effectively.** Government will work with industry and regions to strengthen capability to interpret and apply tourism data and insights. This includes supporting effective information sharing so that evidence is consistently used to inform planning and investment decisions at national, regional, and local levels, and the benefits of improved insights are shared across the tourism system.



*Kinloch, Waikato*

Policy Objective 2

# Delivering high-quality visitor experiences



## Quality visitor experiences drive value and destination competitiveness

### A high-quality visitor experience is central to New Zealand's competitiveness as a destination.

It encourages visitors to spend more, repeat travel and recommend New Zealand to others. Over time, infrastructure pressures, congestion and inconsistent delivery can erode quality and weaken differentiation. Domestic tourism supports this objective by providing steady demand year round.

The visitor experience is dependent on several factors working well together. This includes destination stewardship, accommodation supply, infrastructure readiness, hospitality and clear signals about priority experiences. Where these elements are misaligned, quality can decline. When they are working well, the system enables businesses to provide extraordinary experiences. Delivering new and higher-quality experiences at scale also requires significant private sector investment – including foreign direct investment – supported by stable, transparent settings and data that give investors the confidence to commit capital.

Quality assurance frameworks, such as government-owned Qualmark, support trust and confidence in New Zealand's tourism offering, particularly in offshore markets. Other quality assurance pathways led by the market include review websites, trusted brands, awards or certifications. These systems make it easier for trade partners to easily understand and promote New Zealand as a destination. It also supports consistency in how the visitor experience is represented internationally, while allowing industry to differentiate and innovate within those settings. As a major provider of visitor experiences, DOC plays a critical role in shaping perceptions of quality, stewardship and value in New Zealand's tourism offering. The conservation estate is a core tourism product in New Zealand and a primary driver of destination choice.

This means that investment in biodiversity outcomes and in the upkeep and management of visitor assets on public conservation land and waters (including tracks, huts, campgrounds, signage, toilets, access and supporting facilities) is also an investment in visitor experience quality and the integrity of New Zealand's destination brand. Delivering these outcomes requires ongoing maintenance, capacity management and ecological stewardship to manage pressure at high-demand sites and to ensure that what is marketed is consistently delivered on the ground.

The Government will signal priority areas of differentiation – such as nature-based experiences, Māori culture, food and beverage and active escapes – to guide future investment, experience and product development and workforce capability.



*Poor Knights Islands, Northland*



## Night-time economy

The night-time economy offers an example of how quality visitor experiences are shaped through coordinated, place-led decisions. It brings together hospitality, events, arts and cultural activity operating in the evening and overnight, supported by transport, safety services and well-designed public spaces.

In some New Zealand cities and regional destinations, elements of this approach are already evident. These initiatives tend to be locally driven, clustering activity, investing in shared public amenities and building on the character of neighbourhoods. When well designed, they can create vibrant, welcoming and safe environments that appeal to both visitors and residents.

As part of a broader destination offering, night-time activity can help extend visitor stays, increase spend and support hospitality and creative sectors, while also contributing to more active and safer town and city centres after dark. In this way, the night-time economy illustrates how place-based coordination can deliver benefits that extend beyond tourism alone.

**Policy actions: Visitor experience and stewardship**

- **Provide clear, forward-looking signals about priority experience areas.** Government will signal where New Zealand is seeking to strengthen its competitive edge and what is expected in terms of quality and stewardship, helping regions and the private sector to plan and invest with confidence. This will be based on evidence of demand and opportunities for experience investment and development.
- **Progress a visitor accommodation strategy.** Government will work with industry and councils to develop a visitor accommodation strategy that positions New Zealand's accommodation sector for the future. The strategy will ensure New Zealand accommodation meets the needs of our visitors by delivering the right quality, quantity and mix of offerings. It will help enable sustainable growth in visitation, reinforce New Zealand's appeal and competitiveness as a destination, guide local decision-making and provide clearer, more predictable settings that build private sector investment confidence.
- **Develop a national culinary tourism strategy.** Government will work with industry and regions to develop and implement a culinary tourism strategy that lifts the visibility and value of New Zealand's food and beverage experiences. It will identify opportunities to strengthen destination differentiation and hospitality performance, support regional dispersal and extend the lifetime value of the visitor.
- **Support Māori tourism as a core element of destination differentiation and authenticity.** Government will partner with New Zealand Māori Tourism and Māori tourism leaders to strengthen the capability, commercial sustainability and international profile of Māori tourism experiences. Industry will continue supporting businesses to embrace Māori culture, including te reo Māori and tikanga.
- **Meet trade and consumer needs for quality assurance.** Government will partner with industry to assess the need for different approaches to national quality assurance. This will ensure visitors and travel partners trust New Zealand's tourism products and services.
- **Ensure there is ongoing improvement of service quality and customer experience standards.** Industry will lead the ongoing development and lifting of service quality, accessibility and customer experience standards across the tourism system, including through voluntary accreditation, peer learning, transparent benchmarking and continuous improvement. Industry will be supported by government through enabling settings and information.

Policy Objective 3

# Tourism that works for regions and communities



## Place-based tourism growth that benefits communities and earns local support

Tourism – both international and domestic – is a powerful driver of regional prosperity, employment and placemaking. However, regional tourism benefits are not automatic and are not experienced evenly. When tourism works well for communities, it improves access to, and enjoyment of, hospitality, events, facilities, museums, and galleries—so locals benefit as well as visitors.

### **Tourism as an industry has the power to make communities vibrant and grow its social licence in regions and communities.**

This is integral to delivering on the balanced growth objectives set out earlier in this Statement.

Industry also has an active stewardship role, alongside councils and mana whenua, in ensuring tourism growth is supported by the right local investment, infrastructure and business operating practices so it remains predictable, well-integrated and welcomed by communities over time.

Government’s policy direction acknowledges that in some places, the infrastructure and operational pressures from tourism are significant and may challenge what local ratepayers can afford. This is particularly experienced in places where there is a high ratio of visitors to residents. These pressures need to be managed efficiently to enable tourism growth to be sustained over the long term.

Different places face different challenges and opportunities, and effective responses must be tailored to local needs and expectations about councils keeping rates increases under control and prioritising core services for their communities. Place-based solutions, informed and led locally, are therefore essential, supported by national policy settings that provide consistency, fairness and scale.



*Craggy Range Winery, Hawke's Bay*



## Cycle tourism

The Great Rides cycle trails are one of New Zealand's most successful regional tourism assets. These world-class trails deliver significant economic, recreational and environmental benefits to communities. They boost economic growth by creating jobs, supporting local businesses and attracting new hospitality and accommodation services to set up nearby. The Great Rides also play a key role in regional dispersal, helping more communities benefit from tourism. Protecting and maintaining these trails is critical so they continue to attract both international and domestic visitors and deliver long-term economic benefits for our regions.

### Policy actions: Regions and communities

- **Consider future funding arrangements to enable management of visitor pressures at place and delivery of sustainable tourism growth.** For further detail, see Action 1 under Policy Objective 8 – Investing for impact and long-term value.
- **Consider options to improve transparency for short-term rental accommodation.** Government will work with local government and the sector to assess options, including establishing a register for short-term rental accommodation.
- **Partner with regions to support place-based tourism outcomes.** Government will work with regions and mana whenua to establish a clear partnership pathway that brings together tourism development objectives, regional resilience, destination management capability, and seasonality and dispersal initiatives. This will include:
  - providing a framework for the ongoing development and implementation of regional destination management plans that focus on achievable outcomes, with short-, medium- and long-term priorities and actions
  - enabling priority outcomes at a place level, including for public conservation land or waters where these are central to the destination
  - providing access to data, guidance and capability support, and
  - improving coordination between central government agencies, councils and mana whenua to support year-round, well-managed visitation.
- **Embed stewardship for visitor conduct in business practice.** Industry, working with destination partners, will lead the consistent embedding of shared expectations for visitor behaviour across the visitor journey. This includes strengthening and extending initiatives such as the Tiaki Promise so they are visible, reinforced and normalised from booking through to on-the-ground experience, aligned with local destination management priorities.



*Rocky Rights Surf Patch, Taranaki*

Policy Objective 4

# Productive, resilient tourism and hospitality businesses



## Tourism and hospitality business capability and resilience drive long-term value

**A resilient tourism system depends on productive, innovative and profitable businesses that are able to adapt to changing markets, workforce conditions and environmental expectations.**

Tourism in New Zealand is characterised by a large number of small- and medium-sized enterprises, many of which face persistent challenges with access to finance, high regulatory compliance costs, productivity, skills development, workforce retention and digital capability.

Business productivity and resilience matter because they support good visitor experiences, stable jobs and the ability for regions to cope with changes or shocks. The alternative is businesses that are less able to invest, innovate or respond to changing conditions, increasing pressure on communities and public systems during economic downturns.

Government's policy direction recognises that business evolution is necessary if tourism is to remain competitive and deliver employment over the long term. Some businesses will find this transition easier than others but maintaining existing models at all costs would undermine long-term resilience. Government will act as an enabler and partner in this transition, focusing on lifting capability, reducing the compliance burden, enabling the workforce pipeline and creating an environment that supports industry-led change.

Evolution of digital technologies is rapidly changing the landscape for how visitors access information about New Zealand and for how businesses adapt and grow. A New Zealand Inc effort is required now to make confident, effective and responsible use of AI the norm across the sector. The Government has established enabling settings for AI adoption across the economy. For tourism, opportunities from AI solutions include improved marketing and customer experience (for example, discovery, personalisation and service) as well as other productivity-enhancing measures that streamline back-office and operational processes. Supporting smaller businesses to move beyond basic use of technology will unlock greater benefits for the wider tourism system.



*Auckland Viaduct, Auckland*

### Policy actions: Business resilience and productivity

- **Support industry with lifting productivity and international readiness.** Government will focus on creating the conditions for businesses to succeed. Government will support industry with capability-building that enables firms to compete in international markets, adopt higher-value business models, and invest and innovate with confidence, particularly in areas identified for sustainable growth.
- **Develop a skilled workforce and business leaders.** Industry will lead a coordinated approach to defining priority skills, attracting workforce and supporting retention, and building pathways for developing talent and leadership capability across tourism and hospitality. Government will align enabling systems to strengthen the workforce pipeline – including vocational education, training, jobseeker and immigration settings. This includes workforce planning, investing in school and post-secondary school education and training, setting skills standards, endorsing vocational education programmes and upskilling jobseekers.
- **Accelerate practical AI adoption across tourism and hospitality.** Government will work with industry to embed enabling settings and provide guidance to help businesses use AI to lift productivity, unlock growth, strengthen customer experience and compete more effectively in domestic and international markets – while partnering with industry to scale proven approaches in a fast-moving technology environment. Guidance will also support businesses to share and use data in ways that keep control of it, protect customer and commercial information, and ensure benefits flow back to New Zealand, aligned with relevant wider government AI and digital initiatives. Industry associations and RTOs will lead practical upskilling for tourism businesses, including through delivery partners, building the capability to adapt as tools and models evolve.
- **Reduce unnecessary regulatory burden on tourism and hospitality businesses.** Government will work across agencies and with industry to identify opportunities to simplify, align and improve the design of regulatory and compliance settings affecting tourism and hospitality, with the aim of reducing administrative burden and cost while achieving core regulatory goals (including for health and safety, consumer outcomes and environmental standards). This will include prioritising changes where there is clear evidence that the costs outweigh benefits, and improving guidance, effectiveness of communication channels and consistency of application.
- **Support industry transitioning to lower-emissions and more sustainable operations.** Industry will continue to lead the adoption of practical, scalable approaches to reduce emissions and environmental impacts across tourism and hospitality operations, protecting long-term value and competitiveness. Government will enable this transition through guidance, alignment with national climate initiatives and support for proven approaches.

Policy Objective 5

# Strong international and domestic connectivity



## Reliable air, sea and land links enable a resilient visitor economy

### **A resilient and growing visitor economy depends on sufficient and reliable international and domestic connectivity.**

International air connections are vital for New Zealand and require sustained effort to secure adequate capacity for visitors to travel here in a competitive global market. We also need to attract more cruise ships to New Zealand if we are to take advantage of growing global demand for cruise travel and appetite for New Zealand as a destination. New Zealand's international connectivity depends on many factors working together, including border and visa settings, fuel security, infrastructure, airport and port capability, competitiveness of New Zealand for airlines relative to other potential destinations, consumer demand (from both visitors and New Zealanders heading overseas) and aligned marketing investment. The strength and consistency of New Zealand's international brand play a central role in sustaining demand and attracting visitors. At the same time, these connections are exposed to disruption from a suite of factors, such as geopolitical dynamics, supply chain challenges, changes in exchange rates and the purchasing power of visitors to New Zealand.

Our domestic travel connections and related infrastructure are also critical. Good connections within New Zealand – by air, sea, road and rail – help with the dispersal of visitors throughout the country and support regional economic development. A healthy system requires air links, sea links and core land transport infrastructure to be reliable and efficient, with capacity to get visitors to their destinations.

Each air and cruise connection is valuable. Government recognises it is essential to sustain the confidence of international and regional airlines and cruise lines in New Zealand as a destination and in our connectivity settings. When carriers can plan and operate with confidence, routes are more commercially viable, capacity is more stable, and visitors and freight can move efficiently. The Government's announcement to make RNZAF Base Ohakea a permanent 24/7 alternative airport for wide-body international aircraft signals our commitment to strengthening aviation resilience and reliability.

Air connections also play a vital role in the transport of high-value and perishable products, and changes in passenger capacity flow through to air freight capacity, costs and access to some markets and domestic regions. If confidence declines, our competitiveness is lowered or routes are scaled back or withdrawn, this directly impacts whether visitors come to New Zealand or travel elsewhere.

Government will continue its leadership role in international engagement and negotiations and will partner with industry to grow our international connectivity. Government will also enable domestic connectivity through regional development funding, working with local government to maintain and develop regional links.

This objective underpins the Statement by ensuring that New Zealand has the connections to enable tourism growth and to support regional economies, and our connectivity is supporting long-term resilience.

**Policy actions: Strengthening travel connectivity**

- **Work across central and local government and with the aviation, cruise and other transport sectors to increase connectivity.** Government will continue to lead cross-agency engagement with the aviation, cruise and other transport sectors, including on relevant policy settings. This will provide opportunities for sector-focused engagement with ministers, such as the International Air Travel Tourism Roundtable and the Cruise Forum, to ensure the sectors are supported to grow and build greater international and regional capacity.
- **Provide continued transparency about fee and levy reviews.** Government will continue to provide transparency about the timing, service level changes or requirements, and cost drivers for reviews of its fees and levies. It will consider the impact of fee and levy increases for system-wide cost pressures on aviation and cruise connectivity. Government will also give as much lead time as possible to ensure airlines and cruise lines can adjust their fares to minimise impacts on demand.
- **Negotiate air services agreements to enable more connections.** Government will prioritise negotiating or amending air services agreements that support New Zealand's key trade and tourism opportunities with our core and emerging markets, with input from industry. It will also work on enabling more connections to these markets.
- **Ensure immigration settings continue to support visitor demand.** Government will consider practical opportunities for immigration settings to support tourism growth, such as the trial enabling eligible Chinese and Pacific visitors to come to New Zealand from Australia visa free. Government will continue to ensure visa and travel authority processes are quick and easy.
- **Build a strong and resilient aviation sector.** Industry and government will partner through the Aviation Council to progress the Aviation Action Plan, which includes ambitions to ensure that aviation sector businesses (both international and domestic) thrive and aviation infrastructure enables economic growth.
- **Build a sustainable and resilient cruise sector.** Central and local government will work in partnership with ports, cruise lines and destination communities to support coordinated growth of the sector, ensure port and destination capacity is fit for purpose, deliver high quality visitor experiences and maintain community confidence over time.
- **Ensure visitors have options for reducing their carbon footprint.** Industry and government will partner to ensure visitors are aware of options in the transport system to reduce emissions from their travel, including public transport and the EV charging network.

**Policy Objective 6**

**Creating and shaping demand through targeted and effective marketing**



## Sustaining visibility and shaping demand across regions and seasons

New Zealand's ability to sustain a resilient tourism system depends not only on the quality of our visitor experiences but on our continued visibility and relevance in highly competitive international and domestic markets. This includes protecting the strength of the 100% Pure New Zealand brand, built through decades of investment and consistent delivery and now one of the world's leading destination brands.

Marketing remains a core system function, generating demand for New Zealand as a destination and shaping that demand over time, influencing visitor mix, and supporting the efficient use of the tourism offering across regions and seasons. Continued investment in marketing is therefore essential to protect the value of past and ongoing investment in tourism product, infrastructure and capability, and to support stable demand through periods of volatility and recovery.

**Effective marketing plays a critical role in aligning demand with the strategic direction set out in this Statement.**

Over time, this contributes to stronger export value, more resilient businesses, and improved alignment between visitor demand and destination capacity.

International marketing is led by Tourism New Zealand in partnership with regions and industry. Inbound tour operators (ITOs) also play a role in shaping international demand through trade-facing marketing and sales activity.

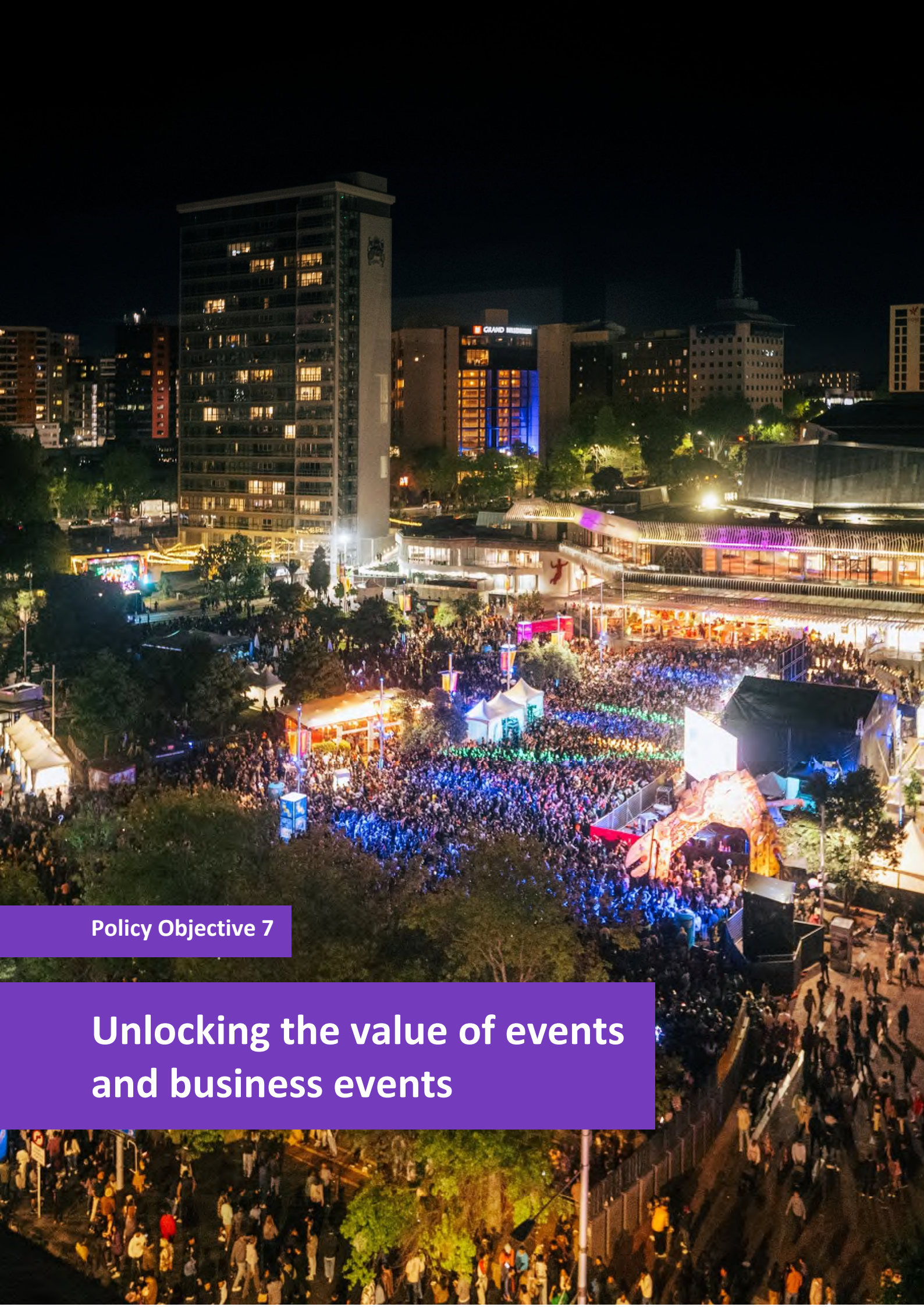
Maintaining a strong and credible market presence is not a short-term lever, but a long-term enabler of sustainable tourism performance and is essential to sustain demand and air connectivity. Domestic marketing is led by local government and its agencies, including Regional Tourism Organisations. Their role involves promoting the events and experiences that cause New Zealanders to travel more frequently in New Zealand, supporting the viability of tourism and hospitality businesses, especially during off-peak periods. This objective reinforces this Statement's strategic direction by ensuring marketing activity creates and converts demand for New Zealand while also supporting system outcomes.



*Abel Tasman National Park*

**Policy actions: Targeted and effective marketing**

- **Sustain international demand generation for New Zealand.** Government will maintain investment in international destination marketing to ensure New Zealand continues to attract visitors in highly competitive global markets, supporting arrivals, export value, and aviation and cruise connectivity over the medium to long term.
- **Better align national and regional marketing.** Government will support macro-regions to develop clear, enduring propositions for international visitors. This will enable Tourism New Zealand to work effectively with destination partners (including councils, RTOs and industry), build a strong understanding of our regional offering with visitors and offshore trade partners and help reduce fragmentation and duplication in marketing activity.
- **Provide stable, multi-year funding and performance signals to Tourism New Zealand.** Government will provide clear baseline funding signals to enable longer-term planning, market development and campaign sequencing. Government will also work with Tourism New Zealand on its core accountability documents to ensure stable performance signals that reinforce this Statement's strategic direction and support consistent delivery over time.
- **Use marketing to support dispersal and seasonality.** Campaign design and market focus will be used to encourage visitation beyond peak periods and to a broader range of destinations where capacity exists.
- **Coordinate marketing campaigns for conservation sites.** DOC will partner with Tourism New Zealand and RTOs to ensure that marketing activities align with conservation and operational priorities and avoid directing demand to sites operating near or at capacity during seasonal peaks. It will use marketing to support dispersal and shoulder periods where capacity exists.
- **Align demand generation with destination capacity and stewardship.** Marketing settings will take account of infrastructure readiness, environmental limits and community outcomes, ensuring demand is shaped to support sustainable growth. This includes aligning campaign timing and market focus with key supply indicators such as accommodation availability and aviation capacity/route connectivity, particularly where dispersal or shoulder-season objectives rely on air access.



Policy Objective 7

## Unlocking the value of events and business events

## Leveraging events to drive year-round demand, regional vitality and high-value visitor activity

Events and business events are central to a well-functioning tourism system. They support year-round visitation, regional dispersal, increased domestic travel, place-making and high-value travel. They also create opportunities to showcase New Zealand's capabilities, creativity and expertise to the world. At a local level, events provide opportunities to generate value from key venues such as our stadiums and convention centres, contribute to building vibrant communities, support local jobs and businesses and create lasting benefits for our communities.

Different types of events perform different functions within the system. **Mega and major events** can elevate New Zealand's profile on the international stage, attract visitors at a significant scale and build investment and trade connections. **Regional events** promote domestic travel and contribute to positive social outcomes. **Business events** generate high-value travel, support knowledge exchange, build investment and trade connections and strengthen off-peak demand. **Community and cultural events** strengthen local identity, provide opportunities to express and grow visitor interest in Māori culture and help sustain social licence for tourism activity.

**From a strategic perspective, a balanced and coherent approach to events is essential.**

Over-reliance on any single type of event can limit resilience and narrow economic growth opportunities, while fragmented investment can dilute impact. Government's policy direction therefore provides certainty that events are a core component of the tourism system, while recognising the need for differentiated approaches.

This objective supports this Statement's wider goals by reinforcing regional vitality and strengthening New Zealand's global reputation as both a destination and a place to do business.



*Te Pae Convention Centre, Christchurch*

**Policy actions: Events and business events**

- **Undertake a review of the events system to strengthen strategy, coordination and public value.** Government is undertaking a review of how New Zealand plans for, invests in and delivers events across the full events ecosystem, with a view to developing a well-coordinated, outcomes-focused system that maximises public value from government investment. The review will consider the appropriate role of central government across different event types; opportunities to improve how outcomes and value are defined and assessed; investment, funding and risk settings (including co-investment and risk-sharing); governance and system coordination (including the central–local interface); and enabling regulatory and legislative settings to support an internationally competitive events ecosystem.
- **Respond to the findings of the Events System Review with staged actions.** Government will integrate decisions arising from the review into the Statement implementation plan and will progress actions in a staged way that recognises the distinct roles of mega, major, regional, business, community and cultural events, and improves system settings over time.



*Cuba Street, Wellington*

Policy Objective 8

# Investing for impact and long-term value



## Strengthening investment settings to support sustainable growth, confidence and long-term system value

Public investment plays a critical role in shaping the tourism system. It signals priorities, influences private and regional investment decisions, and can enable or constrain system change. Where investment processes are short-term, unclear or fragmented, confidence can be undermined and effort diverted into lobbying rather than delivery.

**Significant and efficient investment and a coordinated approach will be essential to achieving the strategic objectives of this Statement.**

Current tourism funding arrangements are showing signs of pressure, particularly at local government level, and will require fit-for-purpose, sustainable settings to support future growth and desired outcomes. Long-term challenges such as visitor-related infrastructure pressure, environmental stewardship, productivity and regional capacity cannot be addressed through short-term, ad-hoc funding decisions. They require clear priorities, consistency over time and alignment with broader system outcomes.

Government's policy direction is to consider fit-for-purpose future funding arrangements, including establishing clearer, longer-term funding objectives, principles and priorities that will enable meaningful system change, address market failures and system pressure points, and provide transparency in how decisions are made.

Being explicit about future investment objectives, principles and priorities means acknowledging that not all good ideas will be funded by government. Clear prioritisation is necessary to achieve lasting value. Public funding should also encourage private investment (including foreign direct investment) rather than replace it, and provide the long-term certainty investors need to commit to improvements in quality, sustainability and productivity.

This objective underpins the credibility of this Statement as an enduring framework, supporting investor confidence and reinforcing trust in public funding processes.



*Urlar Gladstone Winery, Wairarapa*

### Policy actions: Investment impact and value

- **Consider future funding arrangements to enable management of visitor pressures at place and delivery of sustainable tourism growth.** Government will consider future funding arrangements to support the strategic objectives of this Statement and which could support regions to target investment toward local priorities. This includes exploring an accommodation levy policy in 2027, which was agreed to by central government and Auckland Council through the Auckland City Deal.
- **Set clearer, enduring investment outcomes, principles and priorities for tourism-related funding, including the International Visitor Conservation and Tourism Levy (IVL).** Government will develop, in consultation with the industry, strategic outcomes, principles and key priority focus areas to guide investment decisions over time, supporting sector engagement, transparency and improving the impact of investments.
- **Publish transparent investment criteria for tourism-related funding, including the IVL.** Government will make available the criteria and processes used to decide tourism investments, including how specific government or macro-regional priorities could be supported by investment from that funding. This will include expectations for impact, value-for-money and contribution to long-term system outcomes.
- **Strengthen evaluation and learning for tourism-related funding, including the IVL.** Government will continue to improve how the impacts of tourism investment are monitored, reported and evaluated, and use lessons learned to inform future prioritisation.
- **Explore a cross-government approach to growing investment into tourism, including through foreign direct investment.** Government will consider how multiple levers can be strengthened and aligned, including clear market signals through provision of data and insights on priority experiences, planning and consenting settings, infrastructure sequencing, conservation concession settings, investment promotion and other regulatory tools.



*New Zealand Māori Arts and Crafts Institute, Te Puia, Rotorua*

# Implementation, oversight and review



Delivering the intent of this Statement requires clear accountability, sustained oversight and ongoing engagement with the tourism system. Without effective governance, even well-designed policy frameworks risk losing impact over time.

This Statement is ambitious and will require careful sequencing; Government will develop an implementation plan, in consultation with industry and other system partners, to stage actions and clarify priorities and timing. As implementation progresses, ministers may need to consider whether existing institutional arrangements, roles and resourcing remain appropriate or whether changes are required to support effective delivery and stewardship of the tourism system.

This Statement is intended to provide confidence to industry, local government, mana whenua, communities and investors by clarifying direction, expectations and decision-making principles. It also anticipates robust debate, particularly in areas where trade-offs are unavoidable. Clear oversight and transparency are therefore essential to maintaining trust and alignment.

Government will establish appropriate mechanisms to monitor progress, advise on implementation and ensure this Statement remains relevant as conditions change. Periodic refresh will enable the Statement to adapt while retaining its core strategic direction.

#### **Policy actions: Implementation and review**

- **Monitor and report on progress and outcomes.** Government will establish mechanisms and measures to monitor implementation of this Statement and provide periodic public updates on progress, including how key policy, investment and regulatory decisions align with this Statement's objectives and contribute to intended system-level outcomes.
- **Establish a tourism leadership group to progress implementation.** Government will partner with the industry and local government to set up a group comprising representatives from central government, local authorities, industry bodies and strategic partners. The group will provide advice on priorities for each part of the system's respective actions and develop approaches where actions are joint.
- **Use this Statement to guide expectations of system entities.** Government will use this Statement to inform strategic expectations for Tourism New Zealand, MBIE tourism functions and relevant agencies, supporting consistent interpretation and application across the system.
- **Refresh this Statement periodically.** Government will review and update this Statement in line with progress towards the Tourism Growth Roadmap goal to double the 2023 value of tourism exports by 2034 and to reflect emerging trends, risks and evidence, while preserving its long-term strategic direction and role as an enduring guide for the tourism system.

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