

Tourism System Overview

Introduction

This is an overview of the different participants in the tourism system, as of June 2026.

Tourism is one of New Zealand's most significant economic sectors.

- It generates \$46.6 billion in annual expenditure and 7.7% of GDP.
- Spending by international visitors accounts for 17% of total exports.
- Eleven per cent of all people employed in New Zealand work in tourism industries.¹

The system is complex, spanning private operators, industry bodies, local government, regional organisations, Crown entities, and government ministers and their departments, with no single entity controlling outcomes.

The demand side – visitors

The system exists to serve two distinct visitor groups.

- **International visitors** travel from overseas primarily for leisure, business, or to visit friends and relatives. They arrive primarily by air, through the gateways of Auckland, Christchurch, Wellington, Dunedin, Hamilton and Queenstown but also by cruise ships at our ports. International visitors generate foreign exchange earnings for New Zealand and are a key focus of marketing investment. Key source markets are Australia, United States and China. Established supporting markets include the United Kingdom, Germany, Japan and Canada, and other markets, particularly in South and Southeast Asia, are emerging as sources for our visitors.
- **Domestic visitors.** New Zealanders travelling in our own country account for over 60 percent of tourism expenditure (StatsNZ, Tourism Satellite Account, YE March 2025). For many destinations and businesses, domestic tourism is fundamental to achieving sustainable commercial success and supporting community wellbeing. It provides the core demand that keeps operators viable year-round, particularly outside peak international seasons, and underpins the resilience of the wider visitor economy.

The supply side

Operators

Sector associations estimate that New Zealand has around 35,000–40,000 tourism-related businesses, including more than 19,000 hospitality operators, with event businesses spread across both categories. Most tourism businesses are small- to medium-sized, locally owned enterprises. These businesses operate across multiple sub-sectors:

- **Accommodation** – hotels, motels, holiday parks, lodges, bed and breakfasts and short-term rental accommodation properties.
- **Attractions and activities** – including adventure tourism, cultural experiences, nature tourism, heritage sites, local attractions, museums, galleries.
- **Business events** – driver of high value domestic and international tourism activity for travel outside the peak season. Business events provide New Zealand an opportunity for international connection and exchange, through business, trade, investment and academic sectors.

¹ StatsNZ, Tourism Satellite Account, YE March 2025

- **Cruise** – important specialised sector with international and domestic travellers making port stops around the country, particularly over the summer and shoulder seasons. Cruise helps to drive regional dispersal.
- **Events** – public and ticketed events are a key driver of domestic travel, and some events attract international visitors. Events can be a key lever for travel outside the peak season and across regions, as well as a contributor to community vibrancy where they take place.
- **Food and beverage** – restaurants, cafés, and hospitality venues serve visitors and provide opportunities to experience New Zealand produce, products and hospitality.
- **Māori tourism** – a distinctive sub-sector offering indigenous cultural tourism grounded in iwi and hapū enterprise.
- **Tourism services** – organisations that support tourism businesses, from marketing to technology booking platforms, visitor experience specialists, health and safety and regulatory support.
- **Transport** – aviation, cruise, rental vehicles, coaches, ferries, and scenic rail.
- **Travel trade** – inbound tour operators, travel agents, incentive travel operators, and wholesale distributors who bundle and sell New Zealand experiences in international markets. Online travel agents (OTAs) also fulfil a role in getting New Zealand product to market.

Local government and the regional tourism layer

- **Local government** plays a significant role in tourism. Local authorities² make planning decisions that affect tourism development, fund and maintain infrastructure that visitors rely on, and set bylaws governing licensing, short-term rental accommodation, freedom camping, and the use of public space.
- **Regional Tourism Organisations (RTOs)** – 31 in total – operate in most regions of New Zealand. They are primarily responsible for regional destination marketing and visitor experience development. Most have developed destination management plans to shape destination strategy and delivery.

The funding of RTOs is highly variable and is predominantly through rates. Some RTOs fund activity through industry partnerships and/or commercial operations. Most either sit inside the council or are a council-controlled organisation. A small number are trusts or incorporated societies which receive council grants. Approximately half sit within the wider remit of a regional economic development agency.

The national level

- **Many businesses choose to be a member of one or more tourism sector associations.** Each association represents the interests of their members to government and local government, while also providing business intelligence, resources, business capability and training support, and sales and networking opportunities to their members.
- **Cabinet ministers, including the Minister for Tourism and Hospitality, Minister of Conservation and others whose departments are listed below,** make decisions about policy settings and investment of relevant appropriations (included fees and levies that are collected). In many cases the Cabinet makes the ultimate decision.

² Currently comprised of territorial authorities and regional councils, but the Government has announced it will reform this structure.

- **Ministry of Business, Innovation and Employment (MBIE)** is the lead advisor to the Minister for Tourism and Hospitality on tourism, events and hospitality sector policy and related investment advice. MBIE implements the Minister’s policy and investment decisions, partners with the events sector to attract and leverage major events, administers the International Visitor Conservation and Tourism Levy (IVL), publishes tourism data, and provides second opinion advice on relevant policy programmes led by other ministers. MBIE also leads policy advice for the Minister of Immigration on immigration policy, which includes visa settings for international visitors and workers.
- **Tourism New Zealand (TNZ)** is a Crown entity and is responsible for marketing New Zealand as a visitor destination in international markets. TNZ operates under the New Zealand Tourism Board Act 1991 and reports to the Minister for Tourism and Hospitality. It manages the 100% Pure New Zealand brand and delivers marketing activity through offshore offices in key source markets. TNZ also manages the i-SITE visitor information network brand in partnership with local operators and owns the Qualmark quality assurance function.
- **The Department of Conservation (DOC) | Te Papa Atawhai** manages approximately one third of New Zealand's land area, including national parks, reserves, tracks, and huts, as well as conservation waters such as marine reserves. The conservation estate is the foundation of New Zealand's nature-based tourism offering. DOC manages the balance between visitor access and ecological protection, and also administers commercial activity (including tourism and hospitality) on public conservation lands and waters under the Conservation Act 1987 and other conservation legislation.
- **NZ Transport Agency Waka Kotahi** oversees the roading and cycling network that visitors depend on for regional access and dispersal. Transport connectivity is a major determinant of where visitors go and how long they stay.
- **Border agencies** play a critical role in the visitor experience.
 - Most of New Zealand’s visitors do not need a visa to come here and instead can travel on a New Zealand electronic Travel Authority (NZeTA). **Immigration New Zealand** administers the NZeTA via an app and its website. It also collects the International Conservation and Tourism Visitor Levy (IVL – more on this below) from visitors who are required to pay it alongside visa or NZeTA fees.
 - **New Zealand Customs** manages the entry and exit of people and goods, enforcing border controls and contributing to national security. Customs is the first point of contact on arrival.
 - **Biosecurity New Zealand**, a business unit of Ministry for Primary Industries, manages biosecurity at the border, screening passengers, baggage, and freight to protect New Zealand's export-dependent economy and unique biodiversity.
- **New Zealand Māori Tourism** provides advisory services and general business information for Māori tourism businesses.

Funding mechanisms

The tourism system is funded through a mix of sources:

- **General taxation** funds MBIE's departmental activities advising the Minister for Tourism and Hospitality, and most of the Department of Conservation’s and TNZ’s operations.
- **The International Visitor Conservation and Tourism Levy (IVL)**, currently set at NZ\$100, is a per capita levy collected from most international visitors to fund conservation, infrastructure used for tourism (including the cost of operating the infrastructure) and other initiatives

related to tourism. Ministers for Tourism and Hospitality, Conservation and Finance jointly make decisions annually on investing IVL revenues.

- **Rates** are a source of funding for RTOs, venues and local events, many placemaking activities (such as events, public spaces and visitor infrastructure) and, in some places, the provision of key tourism experiences (museums, galleries and zoos).
- **Commercial revenue**, including operator fees (eg concessions), levies and visitor charges, funds a range of product, service delivery and infrastructure investment.
- **User-based** charges are widely used (eg visa fees, border processing levies) that means some government functions that service visitors are cost recovered.

Workforce and training

The secondary education system provides a pipeline of people into the workforce, including both vocational and professional roles. Tertiary providers including polytechnics, universities and private training establishments contribute to the workforce pipeline, particularly in hospitality and tourism management. Several interconnected government agencies have roles in shaping the education system:

- **The Ministry of Education** advises the Minister of Education on education policy for all levels – primary, secondary and tertiary. The Curriculum Centre | Te Poutāhū at the Ministry is responsible for delivery of national curricula, assessment, and teaching expertise for years 013.
- **The Tertiary Education Commission** leads the government's relationship with the tertiary education sector, invests government funding in tertiary education organisations, and provides career services from education to employment.
- **The New Zealand Qualifications Authority** manages the New Zealand Qualifications and Credentials Framework, runs the assessment system for secondary schools, and independently checks the quality of tertiary education providers, except universities.
- **The Services Industry Skills Board (ISB)** is the industry-facing body responsible for workforce planning and the development of standards, qualifications, micro-credentials in tourism, hospitality, events, retail, and related sectors. The Services ISB works with employers to ensure qualifications reflect industry needs.

Data and intelligence

- **MBIE** publishes a range of data, such as the Monthly Regional Tourism Estimates (MRTEs - derived from electronic card transaction data), International Visitor Survey (IVS), Tourism Sentiment Survey (TSS), Accommodation Data Programme (ADP) and the Visitor Flows and Volumes (VfV) and Domestic Visitor Survey (DVS). It supports a dissemination platform for this data.
- **Statistics New Zealand** produces official statistics, such as the annual Tourism Satellite Account (TSA) and international travel and migration statistics, both partially funded by MBIE. The TSA is the definitive measure of tourism's contribution to GDP, exports and employment.
- **TNZ** produces market intelligence for international visitor markets and how New Zealanders feel about tourism in their country.
- **Sector associations** run issues-based surveys of their membership on matters such as business confidence, workforce, and sustainability. They also disseminate summarised industry data and insights to their members.

- **Businesses** produce their own data to support their product and service development and to inform their future investments and planning. Some businesses share this information with other businesses as a way of supporting their and the sector's objectives.

Key government artefacts relating to the tourism system

- **Tourism Growth Roadmap** (MBIE, 2025) – Targets increasing the number of international visitors to New Zealand to at least 2019 levels by 2026 (3.89 million), doubling the value of 2023 tourism exports (\$9.9 billion³) by 2034 (\$19.8 billion), and growing the number of Kiwis in tourism and hospitality jobs.
- **New Zealand's Tourism Policy Statement** (MBIE, 2026) – sets a clear long-term direction for tourism in New Zealand. It identifies eight key objectives for the tourism system to deliver growth that benefits businesses, workers and communities, and actions to achieve those objectives.
- **Tourism New Zealand Statement of Intent and Statement of Performance Expectations** (annual) – TNZ's operational documents set out how TNZ will support achievement of Government targets for international tourism.
- **Going for Growth** (Treasury/MBIE, 2025) – the Government's overarching economic growth framework. Tourism sits explicitly within the *Promoting Global Trade and Investment* pillar, with the doubling-exports target applying directly. This pillar also includes actions to undertake trade missions and negotiate free trade agreements, which can encompass market access and air services agreements, influencing source market potential and connectivity.
- **Going for Growth with Māori | Tōnui Māori** sets out pragmatic actions the Government will pursue over 2025-2026 to support continued Māori economic growth. This includes promoting Māori tourism as a unique selling proposition and platform for export growth.
- **New Zealand Tourism Investment Prospectus** (Invest New Zealand, 2025) – prospectus to attract investment in the tourism sector.
- **Emissions Reduction Plan (ERP)** (Ministry for the Environment, 2026) – tourism is a significant emitter (aviation, domestic transport) and has an interest in reducing emissions and adapting to the changing climate. Tourism has obligations under the ERP framework which shapes the long-term operating environment for tourism.
- **Aviation Action Plan** (Ministry of Transport / Associate Transport Minister, 2025) – 25 initiatives covering connectivity, regulation and infrastructure; aviation access is a direct enabler of visitor arrivals. Ambition to grow and future-proof the aviation sector.
- **Government response to the National Infrastructure Plan** (Treasury, 2026) – sets out how the Government will respond to the Infrastructure Commission's 16 recommendations. The Government has agreed to support all of the Commission's recommendations (including three 'in principle', with further work to be done). This includes developing a 30-year National Infrastructure Plan.

³ Export target is based on International Visitor Survey data for year ended December 2023, which does not include air transport exports.