Regional Tourism Organisations (RTO) Benchmarking Survey

2025 Results
Final Report

31 October 2025

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Preface

This report has been prepared for the Ministry of Business, Innovation, and Employment by Natalie James, Ana Rodriguez, Stephen Knuckey, and Joey Shannon from MartinJenkins (Martin, Jenkins & Associates Ltd).

For over 30 years MartinJenkins has been a trusted adviser to clients in the government, private, and non-profit sectors in Aotearoa New Zealand and internationally. Our services include organisational performance, employment relations, financial and economic analysis, economic development, research and evaluation, data analytics, engagement, and public policy and regulatory systems.

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Established in 1993, we are a privately owned New Zealand limited liability company, with offices in Wellington and Auckland. Our firm is governed by a Board made up of Executive Partners and Independent Directors. Our Independent Directors are Jenn Bestwick and Chair David Prentice. Our Executive Partners are Sarah Baddeley, Nick Carlaw, Allana Coulon, Nick Davis, and Richard Tait. Michael Mills is also a non-shareholding Partner of our firm.

Introducing this report

This report presents the findings of the 2025 Regional Tourism Organisation (RTO) Benchmarking Survey, commissioned by the Ministry of Business, Innovation and Employment (MBIE) and delivered by MartinJenkins. The survey has also been supported by Regional Tourism New Zealand (RTNZ), a membership-based charitable trust that represents the RTO sector.

The survey was designed to collect consistent and comparable data on the financial, operational, and governance characteristics of RTOs across Aotearoa New Zealand during the 2024–2025 financial year. It provides a benchmark of the current state of RTOs, supporting informed decision-making on areas issues such as funding levels, legal structures, governance models, remuneration, and operational priorities.

We hope this report assists individual RTOs in making evidence-based decisions at the local level. This benchmarking exercise comes at a critical time for the sector. The last report was completed in 2018, and there has been no update since, making this an important opportunity to reset the baseline and capture how the sector has evolved. However, it is important to note that the results of this benchmarking survey are not directly comparable to previous iterations, as the questions have been updated to better reflect current priorities.

RTOs, primarily funded and governed by local councils, play a vital role in promoting sustainable tourism that delivers economic, environmental, social, and cultural benefits to their communities. In recent years, shifts in funding models and strategic priorities have introduced both challenges and opportunities.

Acknowledging the time and effort of RTOs

We acknowledge the considerable time and effort contributed by RTOs in completing this survey. The information provided reflects a significant commitment to transparency and sector-wide collaboration. Many RTOs had to collate detailed financial, staffing, and activity data, often across complex organisational structures. Their participation has enabled the creation of this evidence base to support benchmarking, strategic planning, and future policy development.

Our methodology and approach

Undertaking the benchmark survey

Survey design

The survey itself is structured into nine thematic sections, each designed to capture a distinct dimension of RTO operations. These thematic areas, along with a brief description, are outlined in Table 1.

Table 1: Structure of the 2025 RTO benchmarking survey

Thematic area	Description
Governance and legal structure	Captures ownership models, legal status, and governance arrangements.
Funding and revenue	Details financial sources and income breakdowns for the most recent financial year.
i-SITE operations	Focuses on funding, revenue, staffing, and operational changes in i-SITE services.
Projected funding	Documents anticipated income across funding streams for the upcoming financial year.
Staff structure and costs	Collects FTE and remuneration data across organisational roles.
Key performance indicators[1]	Requests strategic planning documents and performance metrics.
Activities and expenditure	Maps organisational effort across core tourism functions and resource allocation.
Qualmark engagement	Assesses regional uptake of Qualmark services.
Partnership programme participation	Documents industry collaboration, membership activities, and revenue generation.

[1] KPI information was collected through the survey and provided separately to MBIE. Analysis of these materials falls outside the scope of this report.

Survey response rate

A total of 30 RTOs participated in the 2025 benchmarking survey, representing a 100% response rate across the sector. This full participation reflects the strong commitment of RTOs to sector-wide collaboration and continuous improvement.

The high response rate ensures that the benchmarking data provides a representative snapshot of the sector. It also enables meaningful comparisons across different organisational types and funding tiers. The breadth of participation strengthens the reliability of insights drawn from the survey and supports evidence-based decision-making at both local and national levels.

Defining RTO funding tiers

To support meaningful comparison across a diverse sector, RTOs have been grouped into five funding tiers based on their total income[2] for the 2023–2024 financial year. These tiers provide a framework for analysing patterns in funding, staffing, and activity levels relative to available resources.

The income bands were developed through an iterative process that balanced statistical distribution with sector relevance. Initial banding was informed by the 2018 benchmarking report, then refined using 2025 survey data to reflect current income levels and ensure a reasonable spread.

The benchmarking tiers are instead derived from actual income data provided through the survey and are designed to support analytical consistency across the report. This tiering approach enables benchmarking that is sensitive to scale, while still allowing for disaggregation by other factors, such whether the RTO functions are carried out by an Economic Development Agency (EDA).

Table 2: RTO funding tiers

Tier	Income band
5	<$500k
4	$500k – $1m
3	$1m – $2m
2	$2m – $4m
1	>$4m

2 Total reported income, excluding Central Government funding, i-SITE funding or underwriting support.

Limitations of the benchmarking data

While the 2025 RTO Benchmarking Survey achieved full participation across the sector, there are still several limitations in this data set that impact interpretation of the findings.

A key challenge in designing the survey was ensuring it could accommodate the wide range of organisational types, structures, and operating contexts that exist across the RTO network. Because of this diversity, not all aspects of RTO activity are captured in this report. **The absence of certain functions or data points does not reflect a lack of value or impact.** Rather, it highlights the difficulty of applying a single benchmarking framework to a sector that is both varied and continually evolving.

Differences in RTO organisational structures

RTOs vary significantly in their organisational form, size, and scope. Some operate as stand-alone entities, while others are embedded within larger council-controlled organisations or economic development agencies. These structural differences affect how functions are resourced, reported on, and prioritised, which in turn influences the comparability of data across the sector.

In many EDA-aligned RTOs, tourism activity is integrated with broader economic development functions, making it difficult to isolate tourism-specific expenditure, staffing, and outcomes. This has implications for how consistently data can be interpreted across the two groups.

Definitional challenges regarding tourism functions and activities

There is no single, universally agreed definition of what constitutes tourism activities across the RTO network. While the survey provided a working definition to guide responses, operational realities often diverge from these boundaries, making consistent reporting difficult.

For the purposes of the survey, tourism activities were defined to include:

- Destination management and strategy
- Domestic and international marketing and promotion
- Industry capability development
- Data, research, and insights
- Business, sporting, and cultural events development, marketing, and promotion
- Other core business activities that support or enable tourism
- Major event management (if relevant)
- Venue management (if relevant)
- i-SITE operations.

In practice, it remains challenging to map the defined activity categories to the day-to-day operations of RTOs, as interpretations vary based on internal structures. For instance, some RTOs are integrated within broader regional development agencies or council units, which means data on staffing, expenditure, and outcomes is often shared across portfolios. This integration makes it difficult to isolate tourism-specific metrics.

In certain cases, RTOs included activities such as city events or venue management within their remit if these functions sat within their team. Other RTOs excluded such functions when services were delivered by third parties or funded separately. Additionally, some RTOs pool funding across functions like tourism promotion and i-SITE services without any ringfencing, further complicating the separation of tourism-related expenditure.

Even within individual RTOs, financial and staffing data is not always tracked or reported in a way that aligns with the survey's definitions. These definitional ambiguities have implications for the consistency and comparability of the data. Where standardisation was not possible, respondents were encouraged to apply their judgement and provide explanatory notes, which were considered in the analysis.

RTO boundary changes

Some RTOs have undergone recent, or ongoing, structural changes, including shifts in geographic coverage, governance arrangements, and organisational form. These changes have implications for data consistency and comparability across the sector.

Incomplete or missing data

While every effort was made to ensure a comprehensive dataset, some gaps and inconsistencies remain. In a small number of cases, complete information was not available at the time of reporting, particularly where data is not routinely tracked or disaggregated at the level required by the survey. To the extent possible, follow-up was undertaken with individual RTOs to clarify methodology or supplement missing data. However, some inconsistencies and omissions persist and where relevant, are noted in the dataset. **These gaps reflect the operational complexity and diversity of the sector.**

Legal structure, ownership, and governance

Current structural models

Understanding the legal structure and ownership models of RTOs provides context for how they operate, fulfil their statutory responsibilities, and engage with stakeholders. Across New Zealand, RTOs are established under a diverse range of legal forms, each with implications for governance, accountability, liability, and compliance.

As shown in Table 3, 14 RTOs operate as limited liability companies, many of which are also designated Council-Controlled Organisations (CCOs) under the Local Government Act 2002 (LGA). A further six RTOs function as business units within local councils, meaning they operate as internal departments, fully integrated within the council's operations and governance structures. Of these six, one (Whanganui Partners) is classified as a Council Organisation (CO) under the LGA.[3] Of the remaining RTOs, five are incorporated societies, four are charitable trusts, and one (Trust Tairāwhiti) operates as a standalone trust.

In addition to legal structure, it is important to recognise the functional diversity of RTOs. Over the past decade, there has been a noticeable trend toward integrating the RTO function within broader Economic Development Agencies (EDAs). Currently, 14 RTOs operate within EDAs.

Table 3: RTO organisation type

Structure	Count	Entities
Business unit within a council	6	Enterprise Dunedin (EDA) Destination Marlborough[4] MacKenzie Tourism (EDA) Tourism Central Otago Visit Hurunui Whanganui & Partners (Council organisation)
Charitable trust	4	Destination Hauraki Coromandel (CCO) Development West Coast (EDA)

[3] Whanganui & Partners has recently changes from a CCO to being part of Council.

[4] At the time of the survey, Destination Marlborough had recently transitioned to a council-owned model, with formal governance arrangements still being established. For the most recent financial year, Destination Marlborough was best described as a fixed-term council unit, subject to acceptance by council. That acceptance was confirmed in December 2024 and formally enacted from 1 July 2025.

		Tourism Bay of Plenty (CCO) Venture Taranaki (CCO + EDA)
Incorporated society	5	Clutha Development (EDA) Destination Kaikōura Destination Wairarapa Destination Queenstown Lake Wanaka Tourism
Limited liability company	14	CEDA (CCO + EDA) ChristchurchNZ (CCO + EDA) Destination Great Lake Taupō (CCO) Great South (CCO + EDA) Hamilton Waikato Tourism Hawke's Bay Tourism Nelson Regional Development Agency (CCO + EDA) NorthlandInc (CCO + EDA) RotoruaNZ (CCO + EDA) Tātaki Auckland Unlimited (CCO) Venture Timaru (CCO + EDA) Visit Ruapehu (CCO) Wellington NZ (CCO + EDA) Tourism Waitaki (CCO)[5]
Trust	1	Trust Tairāwhiti (EDA)

5 Tourism Waitaki did not self-report as a CCO. However, cross-referencing annual reporting for the relevant financial year, it is stated to be 100% owned by the Waitaki District Council and deemed to be a CCO under the provisions of the Local Government Act 2002 it is deemed to be a Council Controlled Organisation. Tourism Waitaki is a Limited Liability Company with a charitable constitution. It has therefore been manually reclassified as a CCO for the purpose of this report.

Governance arrangements

RTOs across the country report to a diverse range of governance groups, reflecting the variety of ownership models and local contexts in which they operate. The most common arrangement is a formal board of directors, which may be independent or include representatives from councils, industry, or other stakeholders. Many RTOs report to a single board, while others have more complex or hybrid structures. Table 4 provides an overview of the governance arrangements by RTO, coupled with their respective ownership model.

Table 4: Governance arrangements

Ownership model	Entity	Governance arrangements
CCO	CEDA	Board of directors to reflect its dual role as an EDA and RTO. Board Members are appointed through a Council Electoral College, with final approval given by each shareholder council.
	ChristchurchNZ	Governed by a formal board with standard CCO reporting and accountability. Independent board members are recruited by the organisation overseeing the council's trading entities.
	Destination Hauraki Coromandel	Governed by a Board of Trustees and supported by a joint Council Advisory Group. As a trust CCO, board appointments are overseen by the advisory group. The Chairperson is elected by the Board.
	Destination Great Lake Taupō	Operates as a CCO with director appointments made by the council or delegated to the Chief Executive. External appointments are based on skills and experience, with careful consideration of conflicts of interest. Directors typically serve three-year terms aligned with the CCO's terms of reference.
	Great South	Governed by a formal board, with appointments made by a joint shareholders committee representing its shareholders.
	Nelson Regional Development Agency	Primarily owned by Nelson City Council. Director appointments follow council policy, involving a recruitment consultant, an interview panel including board members, and final approval by the council's Governance Committee.
	NorthlandInc	Governed by a board of directors, with shareholders managing the recruitment and appointment process.
	RotoruaNZ	Directors are appointed through a skills-based process overseen by council.

	Tātaki Auckland Unlimited[6]	Operates as a Limited Liability Company (housing the RTO functions) alongside a separate Trust managing regional facilities and cultural organisations. Both Tātaki Auckland Unlimited and the Trust are governed by a shared Board of Directors with terms determined by Auckland Council. The organisation also manages a Destination Partnership Programme, supported by an industry Advisory Group that advises on tourism marketing and the Auckland Convention Bureau. The organisation reports quarterly to Auckland Council's CCO Direction and Oversight Committee.
	Tourism Bay of Plenty	A trust CCO jointly owned by Tauranga City Council and Western Bay of Plenty District Council. Trustees are appointed by the councils through an advertised process involving elected members, senior executives, and the board chair.
	Tourism Waitaki	Governed by a formal board with directors appointed by the shareholder in line with council policy. The board follows a rotation policy requiring all directors to retire over a three-year period, with eligibility for reappointment.
	Venture Taranaki	Governed by a Board of Trustees, with members appointed by its shareholder, New Plymouth District Council.
	Venture Timaru	Governed by an independent board that includes one councillor representative. Positions are advertised and appointed by Timaru District Council. The board selects its own chair.
	Visit Ruapehu	Governed by a formal board with appointments made through an application and recommendation process, subject to approval by the Mayor, CEO of Ruapehu District Council, and the RTO's General Manager.
	Wellington NZ	Operates with a formal board where directors are appointed by its shareholders, Wellington City Council and Greater Wellington Regional Council. Two board members are direct council appointees, with the remaining members representing the wider community.
Independent entity	Clutha Development	Executive Committee elected annually by members, with council appointing representatives every three years in line with the election cycle.
	Destination Kaikōura	An independent entity governed by a formal board. Members are elected at the AGM for two-year terms and may stand for re-election at the end of each term.
	Destination Wairarapa	With local authorities providing significant funding, the board comprises three council-nominated appointees (one from each Wairarapa council), typically recommended by the Mayor and approved by elected council members, alongside three elected members nominated by the membership and elected at the AGM.

6 In the 2024/25 financial year, Tātaki Auckland Unlimited operated as an EDA. However, as of July 1, 2025, the economic development function transitioned into Auckland Council, and Tātaki Auckland Unlimited was reclassified as a Cultural, Events, and Destination Agency.

	Development West Coast	Operates under a formal trust structure. Its eight trustees are selected through a combination of community, professional, and local government pathways.
	Destination Queenstown	Formal boards, with members elected at AGMs or appointed by shareholders.
	Hamilton Waikato Tourism	Governed by an independent four-member board comprising two independent directors (including the Chair), the CEO of its shareholder Waikato Regional Airport Ltd (WRAL), and one WRAL board appointee. Directors (except the CEO) serve three-year terms. The board reports quarterly to a shareholder board and engages with four funding councils.
	Hawke's Bay Tourism	Governed by the Hawke's Bay Tourism Industry Association (HBTIA) board, which appoints its chair and another member to the Hawke's Bay Tourism Ltd (HBT) board. HBTIA also appoints an independent chair and director to HBT. Local government funders appoint an independent director. HBT reports quarterly to council funders and annually to HBTIA.
	Lake Wanaka Tourism	Formal boards, with members elected at AGMs or appointed by shareholders.
	Trust Tairāwhiti	Governed by a Board of Trustees. Trustees are appointed by Gisborne District Council for three-year terms, with staggered retirements. Up to seven trustees may be appointed, including the Gisborne Mayor or their representative. Appointments aim to balance business capability and community insight, with vacancies advertised annually.
Council group or unit	Enterprise Dunedin	Reports to the Council Economic Development Committee, which is local government elected.
	MacKenzie Tourism	Governance includes Council-elected members, and a soon-to-be-established steering group made up of tourism operators. The steering group will consist of two representatives from the MacKenzie Tourism Industry Association (MTIA) and two additional industry members selected via expressions of interest to ensure broad district-wide and sector representation.
	Tourism Central Otago	Operates as a council business unit supported by an independent Destination Advisory Board. The board consists of up to four appointed members and four co-opted members representing the CODC Mayor or councillor, Kāi Tahu, a local tourism business owner or senior manager, and a youth representative (aged 18–30). Additionally, an intern role is included for a secondary school tourism student, who participates in discussions but holds no voting rights.
	Visit Hurunui	Operates as a committee of council comprising eight members: four councillors (including the Mayor), the Chair of Hanmer Springs Thermal Pools & Spa (a council-owned tourism entity), and three representatives from regional business associations. While the business association members may be considered independent, their presence is council-determined to ensure diverse sector representation.
Fixed-term council unit	Destination Marlborough	Currently governed through the council's Economic and Finance Committee. A Destination Advisory Group is planned to be established by the end of 2025.

		Board or committee members will be appointed via an expression of interest process, with selection criteria designed to ensure a diverse representation of tourism industry sectors and expertise.
Council organisation	Whanganui Partners	Recently transitioned from a CCO to a council business unit. It is in the process of establishing a new steering group comprised of council representatives, Māori tourism, the Chamber of Commerce, and tourism operators. Previously, board appointments were made through an application and interview process by councillors; the appointment process for the new steering group is yet to be confirmed.

Board size and composition

Table 5 presents a breakdown of governance membership across RTOs, disaggregated by key stakeholder groups, including tourism industry representatives, iwi and hapū representatives, and other members.

Most RTO boards include at least some representation from the tourism industry, though the level of industry involvement varies widely. Some boards are heavily industry-led, while others have limited or no direct industry representation, with membership dominated by council-appointed or community-based individuals. In general, around one-third of RTO boards include three or more industry representatives, while a similar proportion have one or two. A smaller number of boards have no formal tourism industry members at all, reflecting a more council-driven governance model.

Table 5: Number of governance members by representative group

Entity	Tourism industry representatives	Iwi and hapū representatives	Other members	Total members
CEDA (EDA)	0	0	5	5
ChristchurchNZ (EDA)	0	0	6	6
Clutha Development (EDA)	0	0	8	8
Destination Great Lake Taupō	1	4	1	6
Destination Hauraki Coromandel	5	0	0	5
Destination Kaikōura	7	0	2	9
Destination Marlborough	0	0	0	0
Destination Queenstown	5	0	2	7
Destination Wairarapa	3	0	3	6
Development West Coast (EDA)	0	2	6	8
Enterprise Dunedin (EDA)	0	0	12	12
Great South (EDA)	0	1	5	6
Hamilton Waikato Tourism	1	0	3	4
Hawke's Bay Tourism	2	0	3	5

Visit Hurunui	0	0	8	8
Lake Wānaka Tourism	6	0	0	6
Mackenzie Tourism (EDA)	4	0	3	7
Nelson Regional Development Agency (EDA)	2	1	3	6
NorthlandInc (EDA)	-	-	-	5
RotoruaNZ (EDA)	4	2	0	6
Tātaki Auckland Unlimited	13	1	9	23
Tourism Central Otago	3	1	3	7
Tourism Waitaki	2	0	2	4
Venture Taranaki (EDA)	0	0	7	7
Venture Timaru (EDA)	0	0	5	5
Visit Ruapehu	1	1	4	6
WellingtonNZ (EDA)	2	1	5	8
Whanganui & Partners	4	1	2	7
Tourism Bay of Plenty	-	-	-	6
Trust Tairāwhiti (EDA)	0	0	7	7

Notes

1 This table includes both formal boards (for example, trusts or boards of directors) and council governance structures where no separate board exists.

2 Mackenzie Tourism noted that Mana Whenua engagement is maintained through quarterly meetings with council, focused on tourism priorities and challenges. While not a formal board seat, this arrangement is intended to ensure meaningful input from mana whenua while respecting their capacity.

3 At the time of this survey, Whanganui & Partners was in the process of being restructured. The restructure indicated a steering group of a various representatives, including Councillors, Māori Regional Tourism, Chamber of Commerce, and tourism operators. As this was not yet in place, these answers reflect the likely representation of the steering group.

4 While it did not provide figures, Tourism Bay of Plenty reported that its board includes a Mana Whenua representative, appointed via council-led iwi engagement channels. Appointments are made through a skills-based matrix, with trustee terms of three years and a two-term limit, ensuring a balance of capability and representation.

Funding and revenue

Total income

The combined total income for the 30 RTOs surveyed was just under $78 million, excluding i-SITE operations. Non-EDA RTOs accounted for a larger share of this funding, receiving $45.6 million, compared to $32.2 million received by EDA-aligned entities (Table 6).

Table 6: Total income for non-EDAs versus EDAs RTOs

Total income non-EDA entities	$45,619,000
Total income EDA entities	$32,242,405
Total	**$77,861,405**

These top-line figures masks significant variation in income levels across the network. To better understand this distribution, RTOs have been grouped by tier, based on their relative income scale and functions. Table 7 shows the average income received by RTOs in each tier, disaggregated by EDA status to capture the structural diversity of the EDA landscape. Table 8 provides the total income by RTO.

Table 7: Average total income by RTO tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$6,352,782	$13,966,042	$9,398,086
Tier 2	$3,400,000	$3,198,508	$3,265,672
Tier 3	$1,238,872	$1,378,211	$1,325,959
Tier 4	$1,070,348	$756,809	$913,579
Tier 5	$357,850	$307,401	$332,626

Table 8: Total income by RTO

Tier	Entity	Total income
1	ChristchurchNZ (EDA)	$5,953,145
	Destination Queenstown	$5,200,000
	Enterprise Dunedin (EDA)	$5,136,761
	Tātaki Auckland Unlimited	$22,732,084
	WellingtonNZ (EDA)	$7,968,440
2	Hawke's Bay Tourism	$2,898,365
	RotoruaNZ (EDA)	$3,400,000
	Tourism Bay of Plenty	$3,498,650
3	CEDA (EDA)	$1,447,638
	Destination Great Lake Taupō	$1,800,000
	Destination Marlborough	$1,163,718
	Development West Coast (EDA)	$1,100,000
	Hamilton Waikato Tourism	$1,228,591
	Lake Wānaka Tourism	$1,300,000
	Tourism Central Otago	$1,398,746
	Trust Tairāwhiti (EDA)	$1,168,979
4	Tourism Waitaki	$682,586
	Nelson Regional Development Agency (EDA)	$1,110,497
	NorthlandInc (EDA)	$1,609,569
	Destination Hauraki Coromandel	$807,117
	Destination Wairarapa	$840,043
	Great South (EDA)	$991,790

	Mackenzie Tourism (EDA)	$735,685
	Venture Taranaki (EDA)	$904,201
	Visit Ruapehu	$703,998
	Whanganui & Partners	$750,300
5	Clutha Development (EDA)	$230,000
	Destination Kaikōura	$267,000
	Hurunui Tourism	$347,802
	Venture Timaru (EDA)	$485,700

Notes

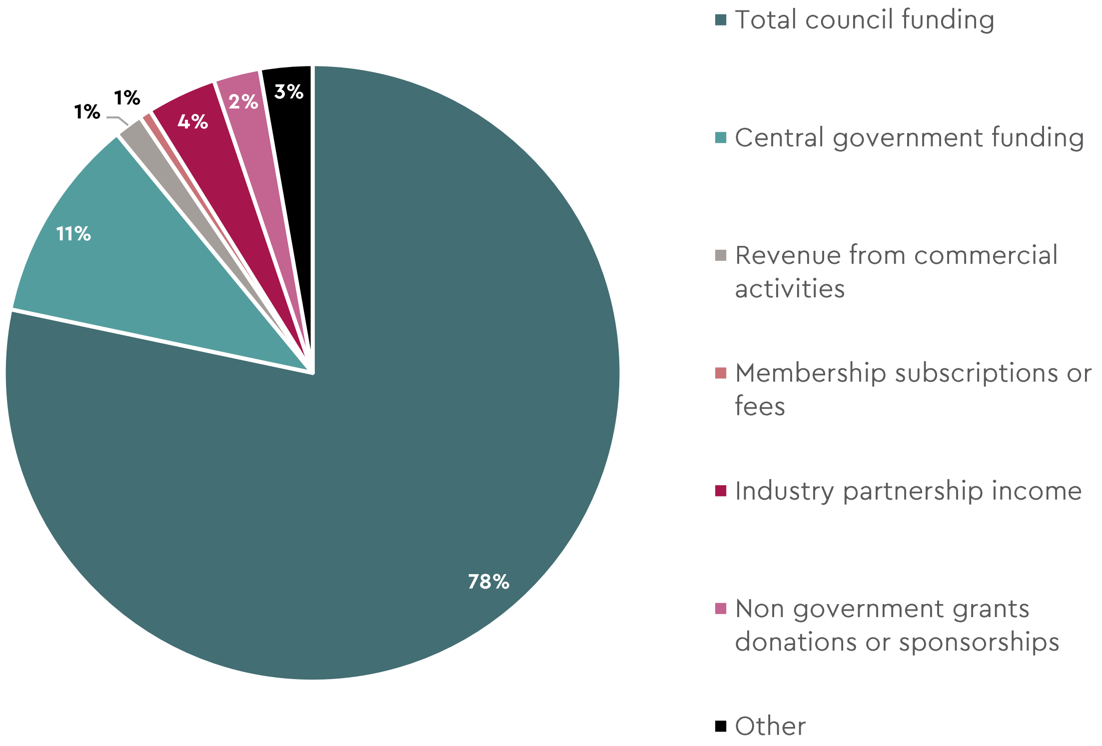
5 Tourism Waitaki's figures reflect RTO-related expenditure rather than total income. The RTO's reported income of $2.9 million is primarily derived from the Oamaru Blue Penguin Colony, a significant tourism asset. While this figure is acknowledged, it may not accurately represent funding allocated to the broader tourism sector. For consistency and fair representation across calculations, we have used their reported expenditure as a proxy here and in our overall calculations.

6 Trust Tairāwhiti Limited's reported tourism expenditure of $1.6 million has been used as the basis for tiering and overall calculations. While the Trust receives a combined economic development and tourism grant from council (reported as $428,000), it is likely that tourism activities are also funded through other sources, including the Trust's own returns. For consistency and fair representation across calculations, we have used their reported expenditure as a proxy here and in our overall calculations.

Total income by source

In addition to understanding total income levels, we examine where RTO funding comes from. Across all 30 RTOs surveyed, local government funding remains the dominant income source, accounting for approximately 78.3% of total income (excluding i-SITE operations) as shown in Figure 1. A detailed breakdown of total income by source for each RTO is provided in Table 8.

Figure 1: Distribution of income source



Notes

7 Estimates are presented as the proportion of each income source within the total income for all RTO

Table 9: Total income by RTO, disaggregated by source

Tier	Entity	Core council	One-off council	Central government funding	Commercial revenue	Membership subscriptions or fees	Industry partnerships	Non-government	Other
1	ChristchurchNZ (EDA)	$4,167,312	$-	$1,268,243	$-	$231,831	$285,760	$-	$-
	Destination Queenstown	$5,200,000	$-	$-	$-	$-	$-	$-	$-
	Enterprise Dunedin (EDA)	$4,485,641	$-	$30,000	$-	$-	$2,780	$118,340	$-
	Tātaki Auckland Unlimited	$16,517,000	$65,000	$2,530,084	$-	$-	$1,600,000	$1,600,000	$420,000
	WellingtonNZ (EDA)	$6,032,000	$361,890	$952,050	$-	$-	$347,500	$-	$275,000
2	Hawke's Bay Tourism	$1,520,000	$100,000	$868,725	$358,409	$31,802	$10,000	$-	$9,429
	RotoruaNZ (EDA)	$3,400,000	$-	$-	$-	$-	$-	$-	$-
	Tourism Bay of Plenty	$2,411,043	$320,801	$537,666	$46,400	$-	$149,861	$-	$32,879
3	CEDA (EDA)	$1,026,022	$55,784	$307,854	$-	$-	$44,372	$-	$13,606
	Destination Great Lake Taupō	$1,750,000	$-	$-	$-	$-	$-	$-	$-
	Destination Marlborough	$1,113,718	$-	$-	$-	$-	$50,000	$-	$-
	Development West Coast (EDA)	$-	$-	$-	$-	$-	$-	$-	$1,100,000
	Hamilton Waikato Tourism	$1,108,591	$-	$-	$-	$120,000	$-	$-	$-

	Lake Wānaka Tourism	$1,300,000	$-	$-	$-	$-	$-	$-	$-
	Tourism Central Otago	$1,192,189	$-	$86,607	$-	$10,350	$101,900	$-	$7,698
	Trust Tairāwhiti (EDA)	$428,000	$-	$-	$-	$-	$-	$-	$-
4	Tourism Waitaki	$-	$-	$-	$2,900,000	$-	$-	$-	$-
	Nelson Regional Development Agency (EDA)	$630,255	$16,263	$319,954	$-	$-	$144,025	$-	$-
	NorthlandInc (EDA)	$743,800	$-	$796,850	$11,940	$-	$56,979	$-	$-
	Destination Hauraki Coromandel	$651,469	$11,000	$128,138	$-	$-	$12,820	$-	$3,683
	Destination Wairarapa	$502,372	$-	$56,625	$41,958	$67,386	$-	$110,000	$61,702
	Great South (EDA)	$837,000	$-	$122,500	$-	$-	$-	$32,290	$-
	Mackenzie Tourism (EDA)	$640,101	$-	$95,584	$-	$-	$-	$-	$-
	Venture Taranaki (EDA)	$887,897	$-	$-	$1,304	$-	$7,000	$15,000	$-
	Visit Ruapehu	$650,000	$-	$45,500	$-	$-	$-	$-	$7,700
	Whanganui & Partners	$570,000	$-	$180,300	$-	$-	$-	$-	$-
5	Clutha Development (EDA)	$35,000	$-	$-	$-	$-	$-	$-	$195,000
	Destination Kaikōura	$255,000	$-	$-	$-	$12,000	$-	$-	$-
	Hurunui Tourism	$347,802	$-	$-	$-	$-	$-	$-	$-

	Venture Timaru (EDA)	$408,000	$60,000	$-	$-	$-	$12,200	$5,500	$-

Notes

8 **CEDA:** CEDA reported its total EDA funding and confirmed that $1.47 million was internally allocated to RTO activities. CEDA does not receive separate or specific RTO funding from Councils; rather, its tourism function is supported through core EDA funding. Given this structure, a pro-rata approach was applied to estimate RTO-related funding sources based on reported tourism expenditure. CEDA's funding by source has been adjusted accordingly to align with the total income reported for RTO activities only.

9 **CEDA:** Additionally, CEDA reported industry partnership income related to Te Utanganui – the Central New Zealand Distribution Hub, which is not tourism-related. As such, this has been excluded from the Partnership Programme breakdown later in this report

10 **Enterprise Dunedin:** The $2,780 reported under industry partnerships by Enterprise Dunedin reflects income received from Council-owned properties as reimbursement for their share of an umbrella subscription to an industry association. While this is recorded as partnership income, it does not represent funding for work conducted within the RTO itself. As such, Enterprise Dunedin did not report leading any partnership initiatives in the activities section of the report.

11 **Tourism Bay of Plenty:** The reported $2.411 million in core council funding for Tourism Bay of Plenty includes i-SITE-related funding, specifically classified under "other council sources" (i.e., not from targeted or general rates). The total income figure of $2.49 million excludes commercial i-SITE activities. Projected funding for 2025/26 applies the same classification approach. This explains any apparent discrepancies in income figures across different sections of the report.

12 **Tourism Waitaki:** Tourism Waitaki's reported commercial revenue of $2.9 million is primarily driven by income from the Oamaru Blue Penguin Colony, a significant tourism asset operated by the RTO. While this figure is acknowledged here, for the purpose of calculating overall sector revenue, we have used Tourism Waitaki's reported expenditure of $682,586 as a proxy to ensure a more consistent and conservative representation.

13 **Trust Tairāwhiti:** Trust Tairawhiti Limited's total reported income is $428,000 and is sourced from a combined economic development and tourism grant from Council each year. However, the entities total expenditure is much higher at $1.168 million, reflective of the fact that it likely funds its tourism activities through other income sources, including the Trust's own returns. While this reported figure is acknowledged here, for the purpose of calculating overall council income, we have used Trust Tairāwhiti Limited's reported tourism expenditure as a proxy.

14 For both **Destination Queenstown** and **Trust Tairāwhiti**, targeted rate funding was originally reported under "membership subscriptions or fees." This has been reclassified as targeted rate funding to more accurately reflect the funding source.

15 **Venture Taranaki:** Reported $7,000 income from industry partnerships was a one-off agreement to operationalise activity across the season. As such, Venture Taranaki did not report leading any partnership initiatives in the activities section of the report.

Local government funding

Local government remains the largest single source of funding for RTOs, accounting for the majority of total income across the sector. The figures below reflect total council contributions in 2024/25, including both core funding (ongoing operational support) and one-off or project-based funding. This excludes i-SITE allocations to allow for a consistent comparison.

Table 10 presents the total local government funding received by EDA-aligned and non-EDA RTOs. While funding levels vary widely by tier, as shown in Table 11, local government funding overall was relatively balanced, with non-EDAs receiving slightly more than EDAs in aggregate (noting that they represent 14 out of 30 RTOs).

Table 10: Total council funding for non-EDAs versus EDA RTOs

	Total council funding
Total council funding non-EDA RTOs	$35,585,985
Total council funding EDA RTOs	$24,955,944
Total	**$60,541,929**

Table 11: Average council funding by tier

	EDA entities	Non-EDA entities	Overall average per tier
Tier 1	$5,015,614	$10,891,000	$7,365,769
Tier 2	$3,400,000	$2,175,922	$2,583,948
Tier 3	$750,262	$1,292,900	$1,089,410
Tier 4	$751,063	$476,968	$614,016
Tier 5	$251,500	$301,401	$276,451

Core versus one-off council funding

A total of eight RTOs reported receiving one-off council funding. Of the approximately $60.5 million in local government funding, $0.99 million (1.64%) was classified as one-off funding as shown in Table 12. A full breakdown of one-off council funding by RTO has been provided in Appendix 1.

Table 12: Core versus one-off council funding for non-EDAs versus EDA RTOs

	Core council funding	One-off council funding
Total council funding non-EDA RTOs	$35,089,184	$688,937
Total council funding EDA RTOs	$24,462,007	$496,801
Total	**$59,551,191**[7]	**$990,738**

In 2024/25, RTOs leveraged a diverse array of one-off funding streams to support strategic initiatives aligned with local and national tourism priorities. Funding was provided for specific marketing campaigns to boost regional visibility and attract visitors. In some cases, support was directed toward infrastructure and capability-building projects, such as contributions to distribution hub initiatives and the refurbishment of visitor information centres, including those co-funded with central government.

Resources were allocated to support destination management planning and delivery, including the establishment of dedicated programme roles. In addition, funding was used to deliver or expand low-carbon visitor economy sustainability programmes, and to promote central business districts as vibrant visitor destinations.

Other initiatives included the development of civics experience programmes to foster deeper engagement with local governance and heritage, cruise sector development, and the delivery of visitor ambassador programmes to enhance frontline services. In one instance, funding was also directed toward Māori outcomes work, supporting the integration of te ao Māori into destination strategies.

[7] The figure presented here differs from the $58,810,212 reported in Table 9, which includes $428,000 of reported income from Trust Tairāwhiti Limited. To better reflect funding flowing into the sector, we have instead used Trust Tairāwhiti Limited's reported expenditure for these calculations ($1.168 million). It should be noted, however, that approximately $740,979 of this amount may not derived from Council funding

Targeted versus general rates, and other council funding sources

Local government funding for RTOs primarily comes from general rates, which account for approximately 57% of the total income picture. The remaining funding is sourced from targeted rates[8] (around 39%) and other miscellaneous sources (6%).[9]

14 RTOs reported receiving local government funding through targeted rates, collectively amounting to $23.55 million, or 38.9% of the total local government funding stream. Of the 14 RTOs, 5 receive 100% of their total council funding from targeted rates. A full breakdown of targeted rates is provided Appendix 1.

These targeted rates took a variety of forms, including tourism promotion levies (commercial-only and member-decided), economic development rates, and geographically or sector-specific levies such as city centre, downtown, and capital value differentials. Some were structured with property-type differentials, while others applied to both commercial and non-commercial visitor accommodation. In one case, a contribution from a council-owned tourism asset also supported the local RTO.

In addition to general and targeted rates, six RTOs receive funding from other council-related sources, which collectively contributed $1.72 million in 2024/25. These sources include service contracts, investment income, event sponsorships, and contributions from regional or national initiatives. Miscellaneous "other" council funding by RTO is also provided in Appendix 1.

8 Levies applied to specific property types, geographic areas, or commercial sectors. These rates are often designed to directly support tourism and economic development activities, and their structure varies widely across councils.

9 In some cases, the income from targeted rates, general rates, and other income sources do not equal the total reported council income, likely due to complexity in attributing income to RTO functions by source. For this reason, these figures do not equate to 100%. A detailed breakdown, including any non-responses or anomalies, is provided in the appendix table for transparency.

Contextualising local government funding

To better understand the level of local government support, council funding for RTOs can be assessed in relation to two key financial indicators: total council income and council rates income. These measures help contextualise how significant tourism funding is within each council's broader fiscal capacity and ratepayer base.

Table 13 presents council funding contributions to RTOs as a proportion of both total council income and council rates income, based on the most recent available data (2024).

Table 13: RTO local government funding as a proportion of total council and council rates income

Tier	Entity	Total RTO council funding	Total council income ($m)	Council rates income	RTO funding as a % of total council income	RTO funding as a % of rates income
1	ChristchurchNZ (EDA)	$4,167,312	$1,592.7	$681.1	0.26%	0.61%
	Destination Queenstown	$5,200,000	$359.5	$123.7	1.45%	4.20%
	Enterprise Dunedin (EDA)	$4,485,641	$381.0	$203.9	1.18%	2.20%
	Tātaki Auckland Unlimited	$16,582,000	$4,356.8	$2,536.0	0.38%	0.65%
	WellingtonNZ (EDA)	$6,393,890	$4,356.1	$848.2	0.15%	0.75%
2	Hawke's Bay Tourism	$1,620,000	$952.0	$224.3	0.17%	0.72%
	RotoruaNZ (EDA)	$3,400,000	$370.2	$127.2	0.92%	2.67%
	Tourism Bay of Plenty	$2,731,844	$980.1	$354.7	0.28%	0.77%
3	CEDA (EDA)	$1,081,806	$307.1	$167.5	0.35%	0.65%
	Destination Great Lake Taupō	$1,750,000	$171.9	$93.7	1.02%	1.87%
	Destination Marlborough	$1,113,718	$302.0	$84.3	0.37%	1.32%
	Development West Coast (EDA)	$-	$161.1	$59.1	0.00%	0.00%
	Hamilton Waikato Tourism	$1,108,591	$1,317.8	$499.5	0.08%	0.22%
	Lake Wānaka Tourism	$1,300,000	$-	$-	0.36%	1.05%

	Tourism Central Otago	$1,192,189	$80.7	$42.0	1.48%	2.84%
	Trust Tairāwhiti (EDA)	$-	$359.5	$123.7	0.00%	0.0%
4	Tourism Waitaki	$-	$174.8	$40.8	0.00%	0.00%
	Nelson Regional Development Agency (EDA)	$646,518	$603.9	$173.7	0.11%	0.37%
	NorthlandInc (EDA)	$743,800	$1,021.2	$261.6	0.07%	0.28%
	Destination Hauraki Coromandel	$662,469	$212.2	$135.0	0.31%	0.49%
	Destination Wairarapa	$502,372	$219.6	$84.2	0.23%	0.60%
	Great South (EDA)	$837,000	$453.6	$155.9	0.18%	0.54%
	Mackenzie Tourism (EDA)	$640,101	$53.8	$16.0	1.19%	4.01%
	Venture Taranaki (EDA)	$887,897	$431.3	$182.8	0.21%	0.49%
	Visit Ruapehu	$650,000	$89.3	$28.8	0.73%	2.26%
	Whanganui & Partners	$570,000	$201.9	$73.3	0.28%	0.78%
5	Clutha Development (EDA)	$35,000	$546.5	$30.5	0.01%	0.11%
	Destination Kaikōura	$255,000	$31.0	$9.5	0.82%	2.68%
	Hurunui Tourism	$347,802	$107.9	$28.1	0.32%	1.24%
	Venture Timaru (EDA)	$468,000	$137.7	$69.9	0.34%	0.67%

Source: Total council income and income from rates information has been sourced from Statistics New Zealand. Local Authority Financial Statistics (LAFS): income and rates revenue by local authority. Data obtained via Infoshare, Statistics NZ's data portal. This dataset reports total council income (including rates) and breakdowns such as rates-based revenue for individual territorial and regional councils.

Notes

16 A comparison of local funding against local authority income was not undertaken for Tourism Waitaki, Trust Tairāwhiti, and Development West Coast due to structural complexities. These entities either do not receive direct council funding for tourism activities, or their organisational models make it difficult to isolate tourism-specific funding from broader operational budgets. As a result, any comparative analysis would be unlikely to yield meaningful or accurate insights.

Central government funding

In 2024/25, central government contributions to RTOs totalled approximately $8.33 million. Much of this funding was one-off in nature, typically tied to specific initiatives such as the Regional Events Promotion Funds (REPF), Tourism Boost programmes, Destination Management projects, and creative and cultural event support. Some RTOs also received ongoing or multi-year support. In some cases, RTOs received central government funding to lead or administer collective funding arrangements.

Table 14 presents the total central government funding received by EDA-aligned and non-EDA RTOs, including how much of this was one-off or project-based. Table 15 shows the average total funding picture broken down by tier and entity type. A full breakdown of central government funding by RTO, including source agencies and purpose is provided in Appendix 1.

Table 14: Central government funding for non-EDAs versus EDA RTOs

	Total central government funding	One-off central government funding
Total council funding non-EDA RTOs	$4,433,645	$3,894,980
Total council funding EDA RTOs	$3,893,035	$3,671,321
Total	**$8,326,680**	**$7,566,301**

Table 15: Average central government funding (total) by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$750,098	$1,265,042	$956,075
Tier 2	$-	$703,196	$468,797
Tier 3	$102,618	$17,321	$49,308
Tier 4	$266,978	$82,113	$174,545
Tier 5	$-	$-	$-

Commercial and industry revenue sources

RTOs also generate income through a range of commercial and industry-based activities, including membership subscriptions, partnerships, and non–i-SITE commercial operations.

For the financial year 2024/25, 6 RTOs reported income from commercial activities (excluding i-SITEs), totalling approximately $1.142 million. Six RTOs reported revenue from membership subscriptions, contributing $0.47 million. 14 RTOs reported income from industry partnerships, totalling $2.8 million. Overall, this accounts for $4.4 million or 6% of the total revenue picture for RTOs for the financial year.

The following tables provide a detailed breakdown of commercial and industry-based revenue sources reported by RTOs in 2024/25. Table 16 compares total revenue from commercial activities, membership subscriptions, and industry partnerships between EDA-aligned and non-EDA RTOs.

Tables 17 – 19 show the average revenue per RTO tier for each income stream, offering further insight into how these revenue sources vary by organisational structure and scale. **Where values have been left blank is because no RTO in that tier reported income from that category.**

Table 16: Total commercial and industry revenue for non-EDAs versus EDA RTOs

	Commercial revenue	Revenue from membership subscriptions and fees	Industry partnerships income
Total council funding non-EDA RTOs	$1,129,353	$241,538	$1,924,581
Total council funding EDA RTOs	$13,244	$231,831	$900,616
Total	**$1,142,597**[10]	**$473,369**	**$2,825,197**

10 The figure presented here differs from the $3,360,011 reported in Table 9, which includes $2,900,000 recorded by Tourism Waitaki as income from the Penguin attraction. To more accurately reflect the total commercial revenue into the sector, we have instead used Tourism Waitaki's reported expenditure of $682,586 in this calculation.

Table 17: Average commercial revenue (excluding i-SITEs) by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$-	$-	$-
Tier 2	$-	$202,405	$134,936
Tier 3	$-	$-	$-
Tier 4	$2,649	$144,909	$73,779
Tier 5	$-	$-	$-

Table 18: Average revenue from membership subscriptions by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$77,277	$-	$46,366
Tier 2	$-	$15,901	$10,601
Tier 3	$-	$26,070	$16,294
Tier 4	$-	$13,477	$6,739
Tier 5	$-	$6,000	$3,000

Table 19: Average income from industry partnerships by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$212,013	$800,000	$447,208
Tier 2	$-	$79,931	$53,287
Tier 3	$14,791	$30,380	$24,534
Tier 4	$41,601	$2,564	$22,082
Tier 5	$6,100	$-	$3,050

Non-government and other income sources

Some RTOs also reported income from non-government grants, donations, sponsorships, and "other" miscellaneous sources. As shown in Table 20, for the financial year 2024/25:

- Six RTOs reported income from non-government grants, donations, or sponsorships, totalling $1.88 million.
- Eleven RTOs reported income from other sources, totalling $2.1 million.
- Combined, these sources contributed $3.81 million to the sector.

Other sources of funding included interest income (from general or investment accounts), value-in-kind contributions such as support from hotels, familiarisation hosting, and cruise-related partnerships, as well as revenue from cultural festival stallholder fees and allocations from parent organisation budgets.[11] A full breakdown of revenue from "other" sources has been provided in Appendix 1.

Table 20: Total commercial and industry revenue for non-EDAs versus EDA RTOs

	Non-government grants, donations, sponsorships	Other funding sources
Total council funding non-EDA RTOs	$1,710,000	$543,091
Total council funding EDA RTOs	$171,130	$1,583,606
Total	**$1,881,130**	**$2,126,697**

Table 21: Average revenue from non-government grants, donations, and sponsorships by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$39,447	$800,000	$343,668
Tier 2	$-	$-	$-
Tier 3	$-	$-	$-
Tier 4	$9,458	$22,000	$15,729
Tier 5	$2,750	$-	$1,375

[11] One entity (Development West Coast) reported a lump-sum allocation from its parent organisation's budget. As this organisation is structured as an EDA, the funding was not further disaggregated by source. As a result, its classification may differ from other RTOs, and this may influence the relative proportions of income across different funding categories in the aggregated data.

Table 22: Average income from "other" income source by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$91,667	$210,000	$139,000
Tier 2	$-	$21,154	$14,103
Tier 3	$371,202	$1,540	$140,163
Tier 4	$-	$14,617	$7,309
Tier 5	$97,500	$-	$48,750

Projected funding (2025-2026)

This section presents projected funding levels for RTOs for financial year 2025/26, based on estimates and planning assumptions provided by each RTO. Funding projections are broken down by key income sources, including council funding, central government contributions, commercial revenue (such as membership and industry partnerships), and other non-government sources.

Across all RTOs, the total nominal projected income is $76.26 million, representing a 1.99% decrease compared to current year actuals.

Table 23: Total projected income for non-EDAs versus EDAs RTOs

	Total projected funding	Total variance
Total income non-EDA entities	$42,319,376	-$3,249,624
Total income EDA entities	$33,942,427	$1,700,023
Total	**$76,261,803**	**-$1,549,601**

Table 24 shows the average income projected by RTOs in each tier, disaggregated by EDA status, as well as the total variance for each tier.

Table 24: Average total projected income by RTO tier

	EDA entities	Non-EDA entities	Total average per tier	Total variance per tier
Tier 1	$6,568,288	$12,805,800	$9,063,293	-$334,793
Tier 2	$3,600,000	$2,166,925	$2,644,617	-$621,055
Tier 3	$1,748,087	$1,636,323	$1,678,234	$358,525
Tier 4	$935,521	$709,416	$822,469	-$91,110
Tier 5	$357,850	$322,616	$340,233	$7,607

Overall, we can see significant variation by funding source:

- council funding is projected to increase by 2.6%, indicating stronger reliance on local government contributions
- central government funding is expected to decrease sharply by 78.3%, reflecting the conclusion of time-limited funding streams
- commercial and industry revenue is forecast to increase by 15.8%, and
- other non-government funding is projected to grow by 24.6%.

Figure 2 presents a comparison of total revenue by source, showing projected income for 2025/26 alongside actual income for 2024/25. Table 25 shows total projected income for each RTO, disaggregated by funding source. It also includes the expected year-on-year variation in total income compared to the previous financial year.

Figure 2: Total revenue by source comparison projected income versus actual

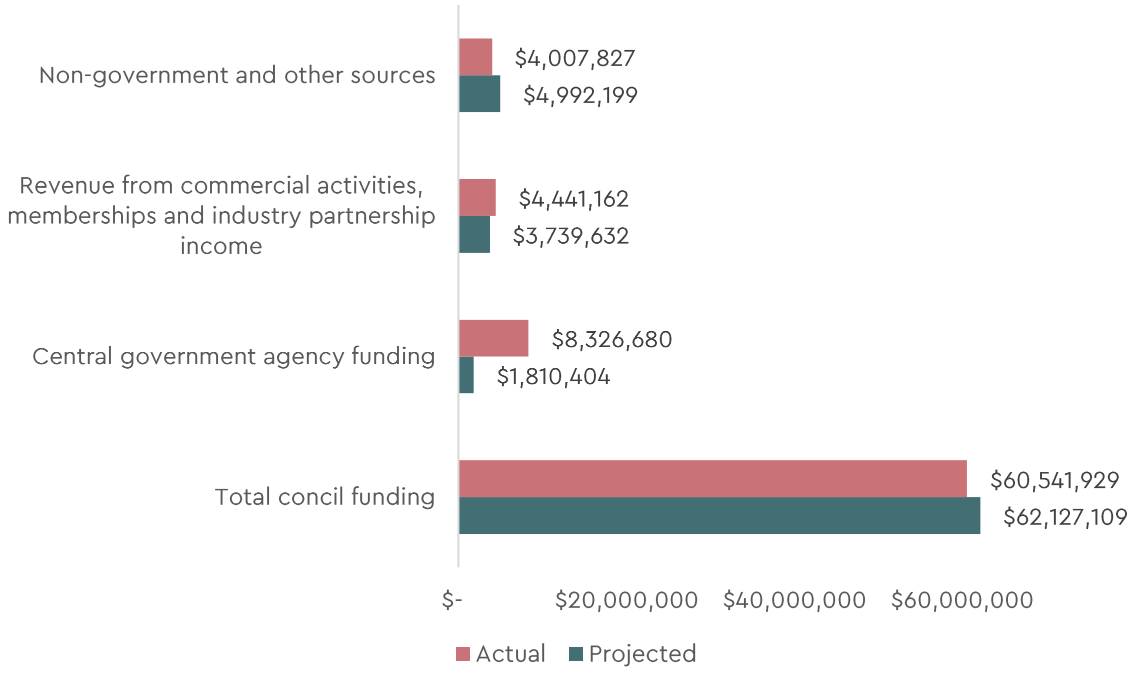


Table 25: Total projected income by RTO, disaggregated by source

Tier	Entity	Core council	One-Off council	Central government	Commercial revenue	Membership fees	Industry partnerships	Non-government	Other	Annual variation (%)
1	ChristchurchNZ (EDA)	$4,781,663	$300,000	$203,139	$-	$220,000	$-	$-	$-	-7.5%
	Destination Queenstown	$5,330,000	$-	$-	$-	$-	$-	$-	$-	2.5%
	Enterprise Dunedin (EDA)	$6,071,399	$-	$-	$-	$-	$-	$181,333	$-	21.7%
	Tātaki Auckland Unlimited	$15,505,000	$100,000	$-	$-	$-	$1,400,000	$1,839,600	$1,437,000	-10.8%
	WellingtonNZ (EDA)	$6,231,170	$750,000	$260,160	$-	$-	$400,000	$-	$306,000	-0.3%
2	Hawke's Bay Tourism	$987,500	$-	$-	$-	$133,000	$85,000	$-	$3,000	-58.3%
	RotoruaNZ (EDA)	$3,600,000	$-	$-	$-	$-	$-	$-	$-	5.9%
	Tourism Bay of Plenty	$2,333,977	$396,590	$227,583	$7,200	$-	$160,000	$-	$-	-10.7%
3	CEDA (EDA)	$1,047,835	$46,747	$269,115	$-	$-	$18,624	$-	$7,480	-4.0%
	Destination Great Lake Taupō	$1,735,241	$-	$-	$20,000	$-	$-	$-	$6,856	0.7%
	Destination Marlborough	$1,151,383	$-	$-	$-	$-	$70,000	$-	$-	5.0%
	Development West Coast (EDA)	$-	$-	$-	$-	$-	$-	$-	$1,100,000	0.0%

	Hamilton Waikato Tourism	$1,155,488	$-	$-	$-	$135,000	$-	$-	$-	5.0%
	Lake Wānaka Tourism	$1,333,000	$-	$-	$-	$-	$-	$-	$-	2.5%
	Tourism Central Otago	$1,196,002	$-	$22,643	$-	$15,000	$75,000	$-	$-	-6.4%
	Trust Tairāwhiti (EDA)	$428,000	$-	$-	$-	$-	$-	$-	$-	-63.4%
4	Tourism Waitaki	$-	$-	$-	$630,000	$-	$-	$-	$-	-7.7%
	Nelson Regional Development Agency (EDA)	$656,575	$28,020	$-	$-	$-	$138,500	$-	$-	-25.9%
	NorthlandInc (EDA)	$677,000	$-	$-	$11,000	$-	$42,000	$-	$-	-54.6%
	Destination Hauraki Coromandel	$665,888	$-	$15,875	$-	$-	$12,000	$-	$2,430	-13.7%
	Destination Wairarapa	$514,931	$-	$89,500	$31,958	$60,000	$-	$100,000	$3,000	-4.8%
	Great South (EDA)	$1,009,000	$-	$373,000	$-	$-	$27,400	$-	$-	42.1%
	Mackenzie Tourism (EDA)	$661,548	$-	$147,889	$-	$-	$-	$-	$-	10.0%
	Venture Taranaki (EDA)	$896,671	$-	$-	$5,000	$-	$4,000	$-	$-	0.2%
	Visit Ruapehu	$650,000	$-	$82,000	$-	$-	$-	$-	$-	4.0%
	Whanganui & Partners	$570,000	$-	$119,500	$-	$-	$-	$-	$-	-8.1%

5	Clutha Development (EDA)	$230,000	$-	$-	$-	$-	$-	$-	$-	0.0%
	Destination Kaikōura	$262,907	$-	$-	$-	$12,000	$8,750	$-	$-	6.2%
	Hurunui Tourism	$355,574	$-	$-	$-	$-	$6,000	$-	$-	4.0%
	Venture Timaru (EDA)	$408,000	$60,000	$-	$-	$-	$12,200	$5,500	$-	0.0%

Notes

17 CEDA's projected funding by source has been adjusted to match their total income reported for RTO activities only.

18 Destination Queenstown and Trust Tairāwhiti projected figures adjusted to include targeted rate funding reported as "Membership subscriptions or fees" funding.

Activities and expenditures

Financial and human resourcing

As shown in Table 26, the total expenditure for tourism activities in 2024/25 is estimated at $39.8 million supported by a total workforce of 226.2 full-time equivalent (FTE) staff across all RTOs. For the purposes of the survey, FTE were defined as 40 hours per week.[12]

Table 26: Total (tourism) expenditure and resource for non-EDAs versus EDAs RTOs

	Total expenditure	Total FTE
Total non-EDA entities	$25,542,553	130.6
Total EDA entities	$14,264,716	95.6
Total	**$39,807,269**	226.2

Tables 27 and 28 present the average and total expenditure and FTEs across RTO tiers[13], highlighting the variation in resourcing levels by organisation scale. When disaggregated by EDA status, it is apparent that non-EDA RTOs report higher average expenditure on core tourism functions, while EDA-aligned entities report more moderate levels of spending. The same is true for FTEs allocated to supporting tourism activities (9.1 FTEs allocated in average, compared to 7.3 FTEs for EDAs).

This may suggest that non-EDA RTOs allocate a greater share of their resources directly to tourism-specific activities, while EDA-aligned organisations may distribute expenditure across a broader range of priorities.[14]

[12] If RTOs use 37.5-hour contracts, they were asked to treat these as full-time (1.0 FTE) for the purposes of the survey.

[13] Average expenditure and FTE figures exclude zeros.

[14] The figures may also underrepresent the true level of EDA aligned RTOs in tourism, due to the complexities of reporting ringfenced tourism expenditure, including challenges in disaggregating tourism-specific functions or accounting for activities delivered through integrated services that are not separately costed.

Table 27: Average total tourism expenditure by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	$2,540,928	$8,325,500	$4,854,757
Tier 2	$2,490,000	$1,756,257	$2,000,838
Tier 3	$344,849	$864,043	$734,245
Tier 4	$370,998	$280,032	$340,676
Tier 5	$318,192	$136,370	$196,977

Table 28: Average total tourism FTE by tier

	EDA entities	Non-EDA entities	Total average per tier
Tier 1	18.4	37.5	26.0
Tier 2	12.7	7.9	9.5
Tier 3	4.1	5.1	4.8
Tier 4	2.8	3.0	2.9
Tier 5	1.4	0.9	1.1

Total expenditure and human resources by RTO

To provide a more detailed picture, Table 29 presents the total expenditure and FTE for tourism-related activities for each RTO.

Table 29: Total expenditure by RTO

Tier	Entity	Total tourism expenditure	Total FTEs allocated to tourism activities
1	ChristchurchNZ (EDA)	$2,198,092	14.00
	Destination Queenstown	$2,900,000	21.00
	Enterprise Dunedin (EDA)	$2,274,808	13.90
	Tātaki Auckland Unlimited	$13,751,000	53.90
	WellingtonNZ (EDA)	$3,149,883	27.20
2	Hawke's Bay Tourism	$2,872,513	4.83
	RotoruaNZ (EDA)	$2,490,000	12.70
	Tourism Bay of Plenty	$640,000	11.00
3	CEDA (EDA)	$954,258	4.85
	Destination Great Lake Taupō	$955,000	7.00
	Destination Marlborough	$195,000	5.00
	Development West Coast (EDA)	$745,000	3.50
	Hamilton Waikato Tourism	$369,698	5.75
	Lake Wānaka Tourism	$1,480,000	7.00
	Tourism Central Otago	$320,000	2.50
	Trust Tairāwhiti (EDA)	$855,000	3.00
4	Tourism Waitaki	$462,500	1.00
	Nelson Regional Development Agency (EDA)	$595,000	3.72

	NorthlandInc (EDA)	$-	-
	Destination Hauraki Coromandel	$270,910	1.75
	Destination Wairarapa	$161,000	2.25
	Great South (EDA)	$299,488	5.10
	Mackenzie Tourism (EDA)	$349,000	2.62
	Venture Taranaki (EDA)	$204,187	4.22
	Visit Ruapehu	$365,000	3.00
	Whanganui & Partners	$359,000	2.20
5	Clutha Development (EDA)	$150,000	0.80
	Destination Kaikōura	$122,740	1
	Hurunui Tourism	$318,192	1.40
	Venture Timaru (EDA)	$-	-

Notes

19 Neither NorthlandInc nor Venture Timaru provided information on activity spend amount or FTEs.

Description of activities undertaken

This section provides an overview of the key activities carried out by RTOs across different categories, based on qualitative survey responses.

Destination management and strategy (excluding marketing)

RTOs are actively involved in implementing and reviewing Destination Management Plans (DMPs). Activities include community engagement, advisory group participation, and delivering local and regional DMP projects. Key initiatives cover product development, cruise tourism planning, post-cyclone recovery, branding, iwi relationships, and social license development. Examples include efforts toward Dark Sky Sanctuary status, the Whale Trail, and cluster development like garden festivals.

Industry capability development

Efforts to build industry capability include symposiums, workshops, and training sessions on trade, digital media, sustainability, and content creation. Programs also feature operator workshops, local awards, and trade-ready support. Online webinars and partnerships with organisations like the Chamber of Commerce support ongoing business development. Specific initiatives include education about the tourism sector, platforms to promote Māori business, and product audits and development.

Domestic marketing and promotion

Domestic marketing covers online campaigns, publications, collaborations, and regional brand strategy execution. Activities support events such as the Gardens Festival and promote cultural products like He Ara Kotahi and Hei Ara Kōrero. Channels used include digital advertising, public relations (PR), social media, radio, and partnerships with airlines and regional media. Seasonal campaigns and "always-on" digital activity target key markets such as Auckland, Wellington, Christchurch, and Nelson. RTOs also invest in website improvements, content creation, traditional collateral, and strategic partnerships to expand reach and improve efficiency.

International marketing and promotion

International efforts focus on trade events (for example, TRENZ, Explore Central North Island, Classic New Zealand Wine Trail, Nau Mai North, and Kiwilink USA/UK), trade sales calls, collaboration with other RTOs, and hosting international trade and media familiarisations. RTOs update trade resources and deliver education through webinars and market visits, in some cases, partnering with Tourism New Zealand. Marketing campaigns, including MBIE-funded initiatives, target Australia and North America through PR, consumer marketing, and trade partnerships. These activities aim to increase trade-ready products, strengthen relationships with product managers, and ensure consistent messaging.

Data, research, and insights

RTOs collect, analyse, and share tourism data to support planning and stakeholder engagement. Regular reporting includes monthly destination overviews, hotel performance, visitor surveys, and economic impact assessments. Some use external agencies for data management and deliver insights through dashboards and tailored reports. This work helps understand visitor trends, evaluate events, and develop actionable content for the industry.

Business, sporting, and cultural events operations (excluding major events)

Event-related activities included the administration and oversight of regional event funds such as the Regional Events Fund (REF), the REFP fund, and local council event funds. Support was provided for business, sporting, and cultural event development and operations, including events such as regional marathons. Activities cover event attraction, permitting, operational support, and delivering roadshows and familiarisation programs. They assist with local event strategies, funding applications, and event planning, sometimes in partnership with councils and sporting bodies. Business event functions include lead generation, subvention, and event prospecting.

Business, sporting, and cultural events marketing (excluding major events)

RTOs delivered marketing and PR campaigns to drive out-of-region visitation and local attendance at supported events. This included digital activity, promotional conversion campaigns, and leveraging owned channels to support event organisers. Business event-specific marketing was carried out through part-time convention bureau functions, Business Events Industry Aotearoa (BEIA) involvement, and participation in other events. Some RTOs implemented promotional strategies aligned with broader event or destination strategies, while others focused on advertising and communications to support major and community events. Activities also included sales, stakeholder partnership programmes, and the use of tools such as digital kiosks.

Other core tourism activities

Other core tourism activities include administration, staff management, finance, reporting, and maintaining relationships with councils and political stakeholders. RTOs also manage communications, website and collateral development, social media, and operator engagement. Participation in conferences, membership programmes, and destination partnerships is common. Additional work includes visitor experience improvements such as info boards and printed materials, as well as supporting initiatives like the Coastal Arts Trail, cruise tourism, film offices, and community grants. Some contractors provide one-on-one operator support and product development assistance.

Expenditure and resourcing by activity

Tables 30 and 31 together show how RTOs across different tiers allocate financial and human resources across core tourism activities. Table 32 and Table 33 provide a breakdown of expenditure and FTE by RTO across key tourism activities (excluding major events, which is discussed separately in Table 35). Figures 3 and 4 illustrate the overall distribution of these allocations.

Table 30: Average expenditure by tourism activity, disaggregated by tier

	Destination management and strategy (excluding marketing)	Industry capability development	Domestic marketing and promotion	International marketing and promotion	Data, research, and insights	Events operations (excluding major events)	Events marketing (excluding major events)	Other
Tier 1	$208,961	$113,942	$809,336	$884,567	$158,154	$2,782,431	$302,114	$587,372
Tier 2	$125,000	$77,117	$793,545	$297,432	$167,500	$320,864	$221,804	$502,036
Tier 3	$136,230	$49,117	$215,609	$106,208	$34,591	$10,000	$70,213	$292,961
Tier 4	$14,759	$18,704	$112,375	$47,305	$24,427	$94,083	$46,085	$68,302
Tier 5	$34,735	$11,250	$70,139	$31,151	$16,667	$-	$-	$110,355

Table 31: Average FTE by tourism activity, disaggregated by tier

	Destination management and strategy (excluding marketing)	Industry capability development	Domestic marketing and promotion	International marketing and promotion	Data, research, and insights	Events operations (excluding major events)	Events marketing (excluding major events)	Other
Tier 1	1.87	1.65	5.33	5.48	0.80	9.04	2.80	1.95
Tier 2	1.13	0.55	3.33	1.40	0.43	0.50	2.13	0.81
Tier 3	1.25	0.76	1.51	0.90	0.28	0.10	0.60	1.00
Tier 4	0.57	0.27	0.76	0.59	0.11	0.40	0.37	0.34
Tier 5	0.18	0.15	0.43	0.15	0.20	-	-	0.40

Figure 3: Distribution of expenditure by activity across RTOs

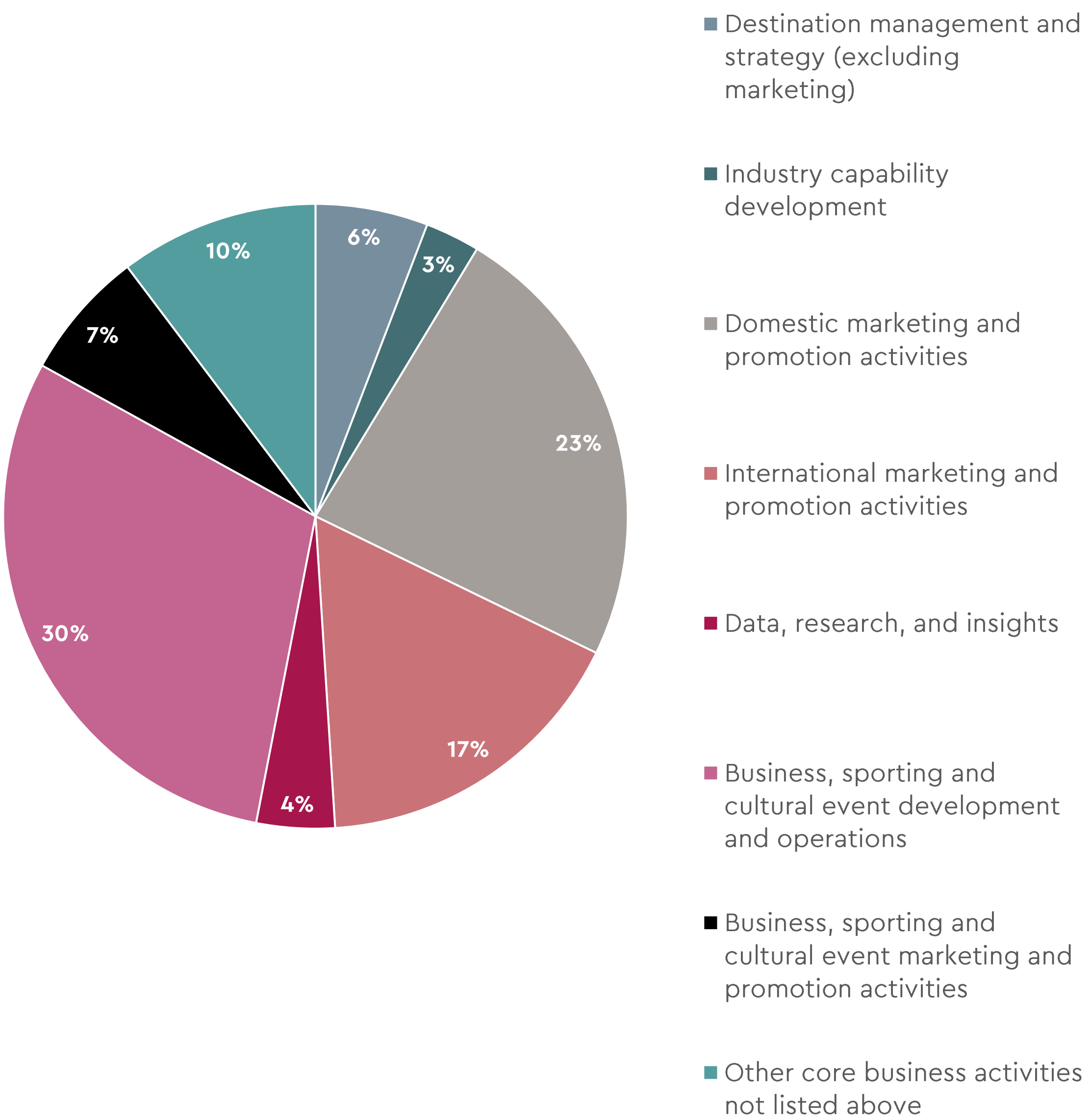


Figure 4: Distribution of FTEs by activity across RTOs

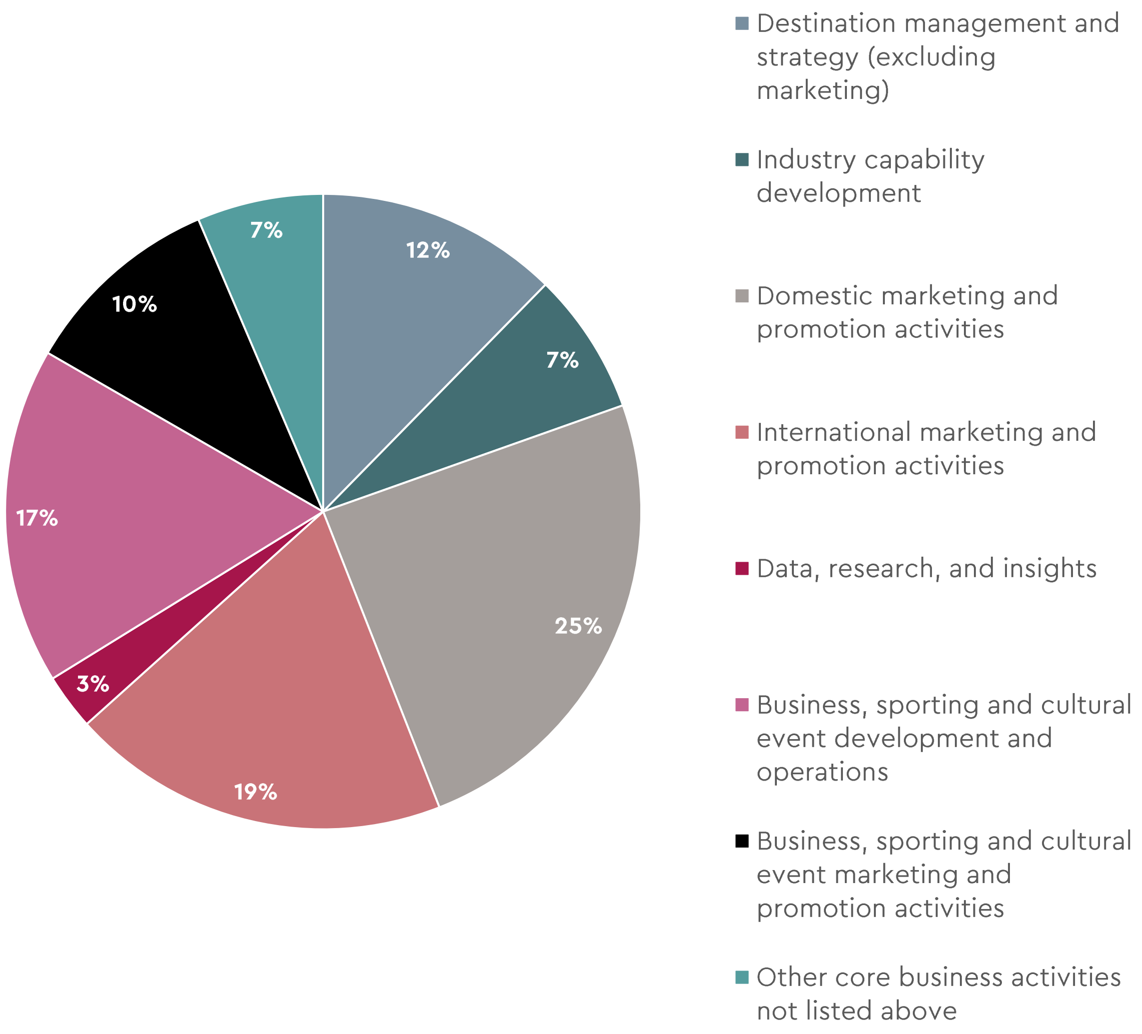


Table 32: Total expenditure by RTO, disaggregated by tourism activity

Tier	Entity	Destination management and strategy	Industry capability development	Domestic marketing	International marketing	Data, research, insights	Events operations	Events marketing	Other	Total
1	ChristchurchNZ (EDA)	$100,000	$117,000	$200,000	$1,000,000	$171,092	$300,000	$100,000	$210,000	$2,198,092
	Destination Queenstown	$500,000	$200,000	$1,000,000	$1,000,000	$200,000	$-	$-	$-	$2,900,000
	Enterprise Dunedin (EDA)	$64,803	$8,768	$476,682	$195,117	$90,827	$412,711	$61,158	$964,743	$2,274,808
	Tātaki Auckland Unlimited	$160,000	$130,000	$900,000	$1,700,000	$265,000	$10,000,000	$596,000	$-	$13,751,000
	WellingtonNZ (EDA)	$220,000	$-	$1,470,000	$527,720	$63,850	$417,013	$451,300	$-	$3,149,883
2	Hawke's Bay Tourism	$-	$119,235	$1,080,636	$132,295	$-	$320,864	$290,411	$929,072	$2,872,513
	RotoruaNZ (EDA)	$100,000	$-	$1,100,000	$730,000	$260,000	$-	$300,000	$-	$2,490,000
	Tourism Bay of Plenty	$150,000	$35,000	$200,000	$30,000	$75,000	$-	$75,000	$75,000	$640,000
3	CEDA (EDA)	$93,380	$43,816	$255,007	$11,666	$29,137	$-	$161,446	$359,806	$954,258
	Destination Great Lake Taupō	$175,000	$75,000	$385,000	$130,000	$30,000	$-	$-	$160,000	$955,000
	Destination Marlborough	$-	$-	$75,000	$10,000	$-	$-	$50,000	$60,000	$195,000

	Development West Coast (EDA)	$50,000	$50,000	$360,000	$220,000	$45,000	$10,000	$10,000	$-	$745,000
	Hamilton Waikato Tourism	$-	$14,000	$194,865	$68,000	$18,000	$-	$74,833	$-	$369,698
	Lake Wānaka Tourism	$150,000	$50,000	$200,000	$200,000	$50,000	$-	$-	$830,000	$1,480,000
	Tourism Central Otago	$100,000	$20,000	$120,000	$30,000	$25,000	$-	$25,000	$-	$320,000
	Trust Tairāwhiti (EDA)	$249,000	$91,000	$135,000	$180,000	$45,000	$-	$100,000	$55,000	$855,000
4	Tourism Waitaki	$-	$2,500	$250,000	$5,000	$20,000	$-	$35,000	$150,000	$462,500
	Nelson Regional Development Agency (EDA)	$15,000	$25,000	$150,000	$115,000	$30,000	$125,000	$85,000	$50,000	$595,000
	NorthlandInc (EDA)	$-	$-	$-	$-	$-	$-	$-	$-	$-
	Destination Hauraki Coromandel	$7,598	$12,820	$31,506	$37,364	$58,943	$-	$122,679	$-	$270,910
	Destination Wairarapa	$5,000	$-	$77,000	$13,000	$-	$-	$66,000	$-	$161,000
	Great South (EDA)	$20,718	$10,000	$85,136	$93,344	$30,290	$35,000	$25,000	$-	$299,488
	Mackenzie Tourism (EDA)	$20,000	$50,000	$60,000	$70,000	$39,000	$60,000	$-	$50,000	$349,000

	Venture Taranaki (EDA)	$-	$4,309	$57,732	$57,038	$7,182	$26,416	$20,000	$31,510	$204,187
	Visit Ruapehu	$15,000	$40,000	$210,000	$25,000	$5,000	$-	$10,000	$60,000	$365,000
	Whanganui & Partners	$20,000	$5,000	$90,000	$10,000	$5,000	$224,000	$5,000	$-	$359,000
5	Clutha Development (EDA)	$40,000	$20,000	$70,000	$15,000	$5,000	$-	$-	$-	$150,000
	Destination Kaikōura	$5,000	$2,500	$44,500	$55,740	$15,000	$-	$-	$-	$122,740
	Hurunui Tourism	$59,206	$-	$95,917	$22,714	$30,000	$-	$-	$110,355	$318,192
	Venture Timaru (EDA)	$-	$-	$-	$-	$-	$-	$-	$-	$-

Notes

20 Event funding excludes major events, which is discussed separately in Table 35.

21 Lake Wanaka Tourism's figures include personnel costs and business overheads.

22 Visit Ruapehu's figure exclude personnel costs but include administrative fees, bank fees, and accountant's fees.

23 Visit Hurunui reported product development and visitor experience work under the "other" category, though they acknowledged these activities may more appropriately align with destination management. Their classification approach tends to reserve "destination management" for specific strategic projects, while budgeting product development separately. This may result in underreporting of destination management activities in comparative analysis.

Table 33: Total FTE by RTO, disaggregated by tourism activity

Tier	Entity	Destination management and strategy	Industry capability development	Domestic marketing	International marketing	Data, research, insights	Events operations	Events marketing	Other	Total
1	ChristchurchNZ (EDA)	2.00	1.00	2.00	2.50	-	3.00	0.50	3.00	14.00
	Destination Queenstown	2.00	2.00	6.00	10.00	1.00	-	-	-	21.00
	Enterprise Dunedin (EDA)	1.00	0.50	3.25	3.00	0.65	2.25	1.50	1.75	13.90
	Tātaki Auckland Unlimited	3.00	4.00	8.00	8.00	1.20	23.50	4.00	2.20	53.90
	WellingtonNZ (EDA)	1.35	0.75	7.40	3.90	0.35	7.40	5.20	0.85	27.20
2	Hawke's Bay Tourism	0.40	0.60	1.50	0.70	0.10	0.50	0.40	0.63	4.83
	RotoruaNZ (EDA)	0.50	-	5.00	3.00	0.20	-	4.00	-	12.70
	Tourism Bay of Plenty	2.50	0.50	3.50	0.50	1.00	-	2.00	1.00	11.00
3	CEDA (EDA)	1.00	1.60	1.60	0.25	0.25	-	0.15	-	4.85
	Destination Great Lake Taupō	3.00	0.50	2.00	0.50	-	-	-	1.00	7.00
	Destination Marlborough	1.00	-	1.00	1.00	-	-	1.00	1.00	5.00
	Development West Coast (EDA)	0.50	0.20	0.70	1.80	0.10	0.10	0.10	-	3.50

	Hamilton Waikato Tourism	1.00	0.75	2.25	0.25	0.25	-	1.25	-	5.75
	Lake Wānaka Tourism	1.00	0.50	2.00	2.00	0.50	-	-	1.00	7.00
	Tourism Central Otago	1.50	-	-	0.50	-	-	0.50	-	2.50
	Trust Tairāwhiti (EDA)	1.00	1.00	1.00	-	-	-	-	-	3.00
4	Tourism Waitaki	-	0.05	0.30	0.10	0.05	-	0.40	0.10	1.00
	Nelson Regional Development Agency (EDA)	0.41	0.26	0.89	0.89	0.15	0.41	0.41	0.30	3.72
	NorthlandInc (EDA)	-	-	-	-	-	-	-	-	-
	Destination Hauraki Coromandel	0.38	0.38	0.50	0.50	-	-	-	-	3.4
	Destination Wairarapa	0.25	-	1.00	0.25	-	-	0.75	-	2.25
	Great South (EDA)	1.25	0.25	1.00	1.00	0.10	1.00	0.50	-	5.10
	Mackenzie Tourism (EDA)	0.40	0.20	0.30	1.00	0.20	0.30	0.02	0.20	2.62
	Venture Taranaki (EDA)	1.15	0.75	0.46	0.46	0.10	0.25	0.46	0.59	4.22
	Visit Ruapehu	0.25	0.25	1.00	1.00	-	-	-	0.50	3.00
	Whanganui & Partners	0.50	0.05	1.40	0.10	0.05	0.05	0.05	-	2.20
5	Clutha Development (EDA)	0.20	0.10	0.40	0.10	-	-	-	-	0.80

Destination Kaikōura	0.20	0.20	0.20	0.20	0.20	-	-	-	1.00
Hurunui Tourism	0.15	-	0.70	0.15	-	-	-	0.40	1.40
Venture Timaru (EDA)	-	-	-	-	-	-	-	-	-

Notes

24 Destination Hauraki Coromandel reported a total 3.4 FTEs for tourism activities but only disaggregated 1.75 FTEs by activity.

25 Destination Kaikōura FTEs by activity were set to total 1 FTE, we have assumed an equal distribution by activity.

Procurement of data products and services

As part of the survey, RTOs were asked to indicate the percentage of their total data, research, and insights expenditure allocated to third-party or external services in the most recent financial year. 18 RTOs reported at least some proportion of data, research, and insights and expenditure as being allocated to the procurement of external products and services, totalling $1.61 million.

RTOs invested in a broad suite of data, research, and insights activities to support evidence-based decision-making, strategic planning, and performance monitoring across the visitor economy. These activities spanned both recurring and project-based initiatives, reflecting the sector's growing emphasis on data-informed approaches.

Core activities included the development and maintenance of online dashboards and reporting tools, monthly regional performance reports, and visitor profiling research. RTOs also accessed accommodation data, economic structure reports, and regional economic forecasting to better understand tourism's contribution to local economies.

Community sentiment and visitor perception research featured prominently, alongside regular reporting on key indicators such as spend, guest nights, and employment. Some RTOs undertook feasibility studies for major events, while others evaluated campaign effectiveness and business event impacts.

Brand and market perception tracking, benchmarking of hotel performance, and analysis of electronic card spend data were also common. Several RTOs contributed to shared research programmes or co-funded data initiatives with economic development teams.

Table 34 provides a breakdown of the total expenditure on third-party procurement of data products and services, as well as the proportion of overall spending allocated to this area. Among those RTOs that provided a response, the majority reported allocating 100% of this expenditure to external providers. However, entities such as Whanganui & Partners, CEDA, RotoruaNZ, and Tātaki Auckland Unlimited all retained a portion of this work in-house. Trust Tairāwhiti reported that the totality of data, research, and insights expenditure was for internal work programmes.

Table 34: Total expenditure on procurement of data products and services by RTO

Tier	Entity	Total procurement expenditure	% of data, research, and insights expenditure
1	ChristchurchNZ (EDA)	$171,092	100%
	Destination Queenstown	$200,000	0%
	Enterprise Dunedin (EDA)	$90,827	100%
	Tātaki Auckland Unlimited	$265,000	65%
	WellingtonNZ (EDA)	$63,850	100%
2	Hawke's Bay Tourism	$-	0%
	RotoruaNZ (EDA)	$260,000	90%
	Tourism Bay of Plenty	$75,000	100%
3	CEDA (EDA)	$29,137	96%
	Destination Great Lake Taupō	$30,000	100%
	Destination Marlborough	$-	0%
	Development West Coast (EDA)	$45,000	0%
	Hamilton Waikato Tourism	$18,000	100%
	Lake Wānaka Tourism	$50,000	0%
	Tourism Central Otago	$25,000	100%
	Trust Tairāwhiti (EDA)	$45,000	0%
4	Tourism Waitaki	$20,000	100%
	Nelson Regional Development Agency (EDA)	$30,000	0%
	NorthlandInc (EDA)	$-	0%
	Destination Hauraki Coromandel	$58,943	0%
	Destination Wairarapa	$-	0%

	Great South (EDA)	$30,290	100%
	Mackenzie Tourism (EDA)	$39,000	100%
	Venture Taranaki (EDA)	$7,182	100%
	Visit Ruapehu	$5,000	100%
	Whanganui & Partners	$5,000	50%
5	Clutha Development (EDA)	$5,000	100%
	Destination Kaikōura	$15,000	100%
	Hurunui Tourism	$30,000	0%
	Venture Timaru (EDA)	$-	0%

Notes

26 RotoruaNZ also reported additional expenditure for a permanent contractor responsible for maintaining dashboards and reporting for RotoruaNZ. However, the figure of $260,000 refers specifically to spending on external data providers, which has been reflected in the table above.

27 Great South initially reported external procurement of data produces at $65,000. However, for consistency with the expenditure section, we have used the figure of $30,290, which more closely reflects direct spending attributable to RTO functions. It's important to note that within the EDA model, investments impact multiple functional areas, and there are no clear-cut demarcations in spending. This highlights the challenge of isolating RTO-specific expenditure.

Major event management

RTOs were also asked to indicate whether their organisation was involved in major event management within their region. For the purposes of this survey, a major event was defined as one that is, or has the potential to be, internationally significant. This includes events that generate international interest, profile, or visitation from outside New Zealand; offer elements that are uniquely representative of New Zealand; and have evidence of international engagement or visibility.

10 RTOs reported that major event management sits within their core functions, collectively dedicating $18.6 million and 20.5 FTE to this area. Of these 10 RTOs, all reported providing funding to major event organisers. Only two (Tātaki Auckland Unlimited and Enterprise Dunedin) also reported managing major events in house. These totals are presented in Table 35.

A further three RTOs[15] indicated that while they undertake major event-related work, it technically sits outside their formal remit.

Table 35: Total expenditure and resources allocated to major events by RTO

Tier	Entity	Major event expenditure	Major event FTE
1	ChristchurchNZ (EDA)	$4,990,000	4.00
	Enterprise Dunedin (EDA)	$795,730	5.00
	Tātaki Auckland Unlimited	$5,470,550	2.42
	WellingtonNZ (EDA)	$5,322,200	6.50
2	RotoruaNZ (EDA)	$550,000	2.00
4	Mackenzie Tourism (EDA)	$95,584	0.30
	Venture Taranaki (EDA)	$926,700	0.10
	Whanganui & Partners	$224,000	-
5	Venture Timaru (EDA)	$245,000	0.20
	Hurunui Tourism	$0	0

Notes

28 Hurunui Tourism stated that major event management is part of their RTO functions, but no expenditure or FTE figures were provided.

[15] Great South, Hamilton Waikato Tourism, and Hawke's Bay Tourism.

Venue management

RTOs were asked if they are involved in venue management for their region. Table 36 shows the data for the two RTOs reported that venue management sits within their core functions, collectively dedicating $15.7 million and 59 FTE to this area. Both WellingtonNZ and RotoruaNZ reported that this is a function that they manage in-house, rather than providing funding to third-party venue management entities.

Two additional RTOs (Tātaki Auckland Unlimited and Whanganui & Partners) indicated that while they undertake venue-management-related work, it is not one of their core functions.

Table 36: Total expenditure and resources allocated to venue management by RTO

Tier	Entity	Venue management expenditure	Venue management FTE
1	WellingtonNZ (EDA)	$13,549,309	42
2	RotoruaNZ (EDA)	$2,200,000	17

Industry partnerships

Finally, RTOs were asked whether they had led any industry partner programmes within their region. A total of 12 RTOs responded 'yes'. Overall, these industry partnership programmes generated approximately $2.69 million for the sector. Due to challenges in data collection, total expenditure associated with running these programmes is not available. Table 37 provides the description of these partnership programmes.

Table 37: Partnerships breakdown

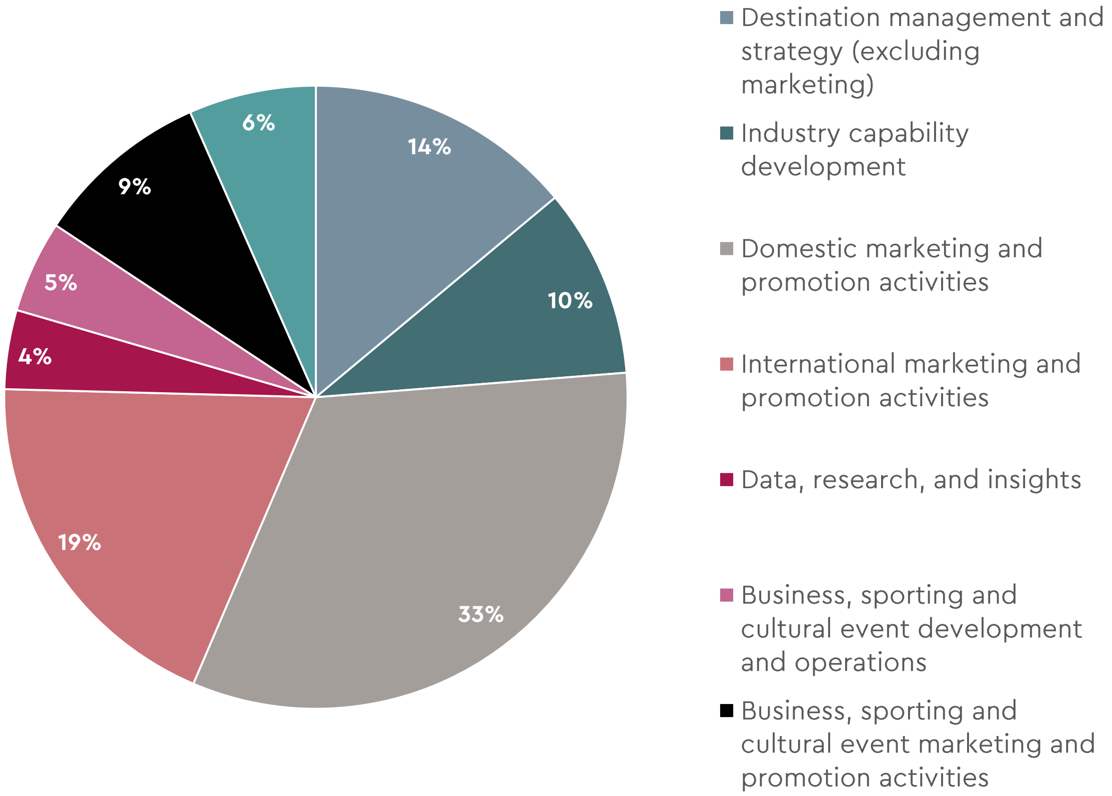
Tier	Entity	Description of partnership programmes
1	ChristchurchNZ (EDA)	Description of partnership programmes is provided in their **Destination Partner Programme Prospectus.**
	Tātaki Auckland Unlimited	**Destination Partnership Programme:** Industry programme supporting tourism and business event attraction, promotion, and marketing.
	WellingtonNZ (EDA)	**Team Wellington:** Trade-focused international partnership for long-term destination development **Classic New Zealand Wine Trail:** Touring route product. **Business Events:** Business events attraction and development.

2	Hawke's Bay Tourism	**Great Wine Capitals Initiative:** Global network membership with branding and activation activities promoting regional wine tourism.
3	Destination Marlborough	**Trade Membership Team:** Access to trade representation and annual trade events. **Brochure Display:** Distribution via i-SITEs. **Visitor Guide Inclusion:** Featured in print and digital regional guides
	Hamilton Waikato Tourism	**Hamilton Waikato Tourism:** Membership programme providing marketing and promotional benefits.
	Tourism Central Otago	**Central Otago Business Events:** Partnership programme for participation in business events and incentive travel promotion.
4	Nelson Regional Development Agency (EDA)	**Destination Partnership Programme (including Food and Beverage):** Supports destination marketing, referrals, networking, product development, business events, and capability development.
	NorthlandInc (EDA)	**International Marketing Group (IMG)** – Extends international marketing reach through offshore trade shows and events.
	Destination Hauraki Coromandel	**GOOD FOR YOUR SOUL – Kaitiaki:** A regenerative tourism and sustainability initiative funded by tourism-related contributions.
	Great South (EDA)	**Inbound Operator Sales Calls:** Sales training with inbound tour operators.
5	Venture Timaru (EDA)	**South Canterbury Outstanding Food Festival:** Promoting South Canterbury produce with eateries producing a dish to hero local produce.

Distribution of time spent across tourism activities

Figure 5 shows the distribution of time spent by RTOs across core activities, with the greatest focus on domestic marketing and promotion, followed by international marketing and destination management and strategy functions. It's important to note that this time allocation was based on a broad estimate and should be considered indicative rather than definitive.

Figure 5: Distribution of estimated time (%) by activity



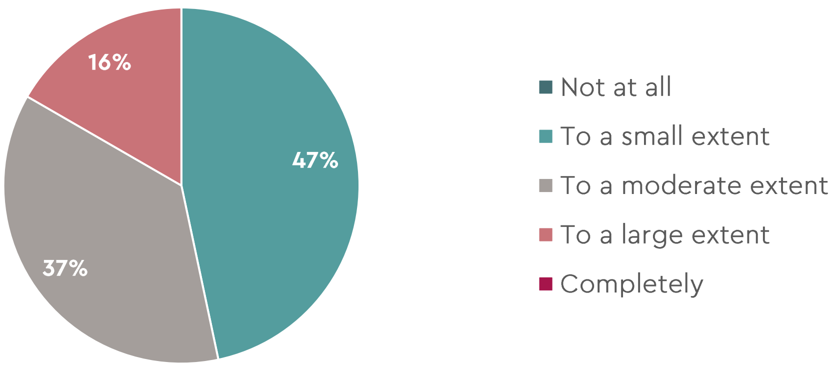
Notes

29 Survey respondents were asked to provide an estimate of how time is allocated across core activities. Not all responses totalled 100%, largely due to difficulties in attributing time, particularly where functions support RTO activities but are delivered elsewhere within an EDA or parent organisation. This measure should be considered a blunt tool, intended to provide a broad indication of where time is most spent rather than a precise accounting.

Qualmark engagement

Figure 6 shows how RTOs assess the extent to which businesses in their regions are making the most of the opportunities available through Qualmark. The responses show varying degrees of engagement with Qualmark across the country. However, patterns in the qualitative responses (described below) reveal consistent themes regarding why some operators are highly engaged while others are less so, including perceived value, cost barriers, and the level of support or exposure provided through the programme.

Figure 6: Extent to which businesses in your region are making the most of opportunities available through Qualmark



Qualmark opportunities for businesses

Three organisations reported that businesses in their region, to a large extent, are making the most of the opportunities available through Qualmark.

- They indicated that there in strong uptake in their region, and that Qualmark certification allows operators to be included in familiarisation opportunities. Operators also recognise it shows a commitment to best practice.
- Qualmark is also used to support operator risk assurance, especially with overseas travel trade.

- However, these RTOs note that operators need to see more value, and more are asking what they get for the fees they pay.

11 RTOs reported that, to a moderate extent, businesses in their region are making the most of the opportunities available through Qualmark.

- While there is a reasonable number of Qualmark-accredited operators in these regions, many RTOs noted that the full value of the programme is still not widely understood or utilised.
- For most businesses, the main motivation to become Qualmark certified is to participate in Tourism NZ (TNZ)-led activities, such as famils and enhanced visibility on newzealand.com. A smaller number use the audit feedback for business development, particularly newer operators.
- Several RTOs highlighted concerns from operators, especially small to medium-sized businesses, about the cost and perceived lack of tangible benefits. There is a view that Qualmark lacks global recognition and may not be as relevant as other sector-specific or internationally recognised certifications.
- While some operators continue to invest in maintaining their Qualmark status, others question its value. According to one response, Qualmark has not operated well in their region, causing businesses to lose interest in opportunities to be involved. In many cases, the cost of Qualmark certification prevents high-quality operators from participating, which in turn limits what the region can present through TNZ opportunities.
- RTOs are continuing efforts to increase uptake, but they emphasise the need for clearer benefits to justify the investment, particularly for smaller business

Finally, 14 RTOs reported that businesses are only to a small extent making the most of Qualmark opportunities.

- Many operators sign up primarily because they believe it is a requirement to work with TNZ, particularly to access famils and attend trade shows.
- However, there is a widespread perception that the return on investment is low, especially for small, domestically focused businesses. Common concerns include the cost of Qualmark, duplication with other compliance and certification requirements, and limited engagement or visibility from TNZ in some regions.
    - Some RTOs report that TNZ does not regularly include their region in famils or campaigns, reducing the incentive for operators to maintain Qualmark certification.
- Some RTOs noted that only a few operators in their area are currently Qualmarked, with some having recently discontinued due to lack of value. While a few businesses see benefits (which is often depending on the quality of the assessor) many operators do not view Qualmark as a high priority.

i-SITE operations

Current i-SITE operations

At the time of the survey, a total of 11 RTOs were operating 17 i-SITEs across the country, supported by 87.4 full-time equivalent (FTE) staff.[16]

In total, $2.26 million in funding was provided by councils or other sources to underwrite i-SITE operations across the network. This figure reflects the direct financial support required to maintain i-SITE services in cases where revenue was insufficient to cover operating costs. A breakdown of the total number of i-SITEs, FTEs, and underwriting funding by RTO is provided in Table 38.

Table 38: i-SITE breakdown by RTO

Tier	Entity	Number of i-SITEs	Underwrite (total funding)	Revenue	FTE (total)
1	Enterprise Dunedin (EDA)	1	942,948.0	$290,995	8.9
	WellingtonNZ (EDA)	1	220,509.0	$401,836	4.0
2	RotoruaNZ (EDA)	4	-	$2,400,000	45.0
	Tourism Bay of Plenty	1	542,949.0	$237,160	5.0
3	Destination Marlborough	2	-	$1,250,000	6.5
	Lake Wānaka Tourism	1	-	$500,000	4.0
	Tourism Central Otago	2	189,833.0	$26,016	2.0
	Trust Tairāwhiti (EDA)	1	-	$802,477	5.0
4	Destination Wairarapa	1	43,787.0	$14,485	3.2
	Visit Ruapehu	2	-	$-	-
	Whanganui & Partners	1	325,000.0	$55,882	3.8

16 While there are a larger number of i-SITES in operation nationwide, this report focuses exclusively on those operated by RTOs.

Changes to i-SITE operations since 2019

Table 39 sets out how the 30 RTOs surveyed have changed their i-SITE operations since 2019. Of these, seven RTOs have completely ceased operating any i-SITEs. The reasons provided include:

- post-COVID, it was no longer viable to maintain an i-SITE; in some cases, boards have placed them into hibernation with the intention to reopen as visitor centres in the future
- costs associated with running i-SITEs exceeded the income generated
- financial decisions deeming the operation no longer sustainable
- shutdowns directly due to the impacts of COVID-19
- councils faced high operational costs and chose to withdraw i-SITE contracts from RTOs, often preferring community groups to manage them instead, and
- the traditional i-SITE business model, reliant on bookings and advertising revenue, has become financially unsustainable due to changing visitor behaviours. Despite ongoing efforts, many RTOs continue to struggle to balance demand for in-person visitor support with the funding required to maintain i-SITE operations.

One RTO (RotoruaNZ) opened a new i-SITE at Waipa.

Table 39: Changes in i-SITE operations

	Total RTOs	Proportion of RTOs
RTOs that have decreased i-SITE operations	9	30%
RTOs that have increased i-SITE operations	1	3%
RTOs that did not operate any i-SITEs in 2019 and still do not	13	43%
RTOs with an unchanged number of i-SITEs since 2019	7	23%
Total	**30**	**100%**

Staff structure and costs

Combined, all 30 RTOs surveyed employed 250.5 full-time equivalents (FTEs) (excluding i-SITE operations), with total remuneration costs of $26.64 million.[17] As expected, larger RTOs employed more staff and had higher overall remuneration costs.[18] However, the average remuneration cost per FTE was consistent across RTOs of all sizes.

These figures are provided in Tables 40 and 41, with Table 42 showing the total remuneration costs by function role, disaggregated by tier, rounded to the nearest thousand.

Table 40: Total FTE and remuneration by tier

Tier	Total FTE	Total remuneration
Tier 1	131.9	$14,431,760
Tier 2	31.5	$3,037,968
Tier 3	48.3	$5,093,243
Tier 4	33.2	$3,528,382
Tier 5	5.6	$550,960

Notes

30 Both Nelson Regional Development Agency and RotoruaNZ provided estimates to this question in the survey.

[17] The total FTE dedicated to core tourism activities reported in the previous section (226.2) differs slightly from the overall staff count provided here. This discrepancy likely reflects challenges in accurately resolving how roles are distributed across functions, particularly in organisations where staff contribute to multiple areas or where tourism functions are embedded within broader structures.

[18] Remuneration costs were defined in the survey as direct salary expenses only, including base salary or wages, employer KiwiSaver contributions, ACC levies, and other direct employment costs. Overheads, indirect costs, and organisational contributions were excluded.

Table 41: Average FTE and remuneration by tier

Tier	Average FTE	Average remuneration costs	Average remuneration per FTE
Tier 1	26.4	$2,886,352	$108,452
Tier 2	10.5	$1,012,656	$100,747
Tier 3	6.0	$636,655	$105,886
Tier 4	3.3	$352,838	$110,790
Tier 5	1.4	$137,740	$94,907

Table 42: Average remuneration by role, disaggregated by tier

role	Tier 1	Tier 2	Tier 3	Tier 4	Tier 5
Executive level	$211,636	Suppressed	$178,195	$157,307	Suppressed
Senior management	$156,006	$129,612	$130,421	$107,058	$100,375
Mid-level management	$103,565	$102,438	$84,275	$93,464	Suppressed
Specialists and analysts	$85,415	$-	$88,947	$86,760	$76,111
Junior or support roles	$79,697	$82,662	$64,510	$83,134	Suppressed

Notes

31 Meaningful categorising of roles across RTOs proved challenging due to variations in job titles, responsibilities, and organisational structures. As a result, the figures presented should be interpreted as indicative rather than definitive.

32 Averages have been rounded to help protect individual salary confidentiality. Where data is based on a single salary, it has been suppressed.

Appendix 1: Detailed breakdown of income streams

Local authority funding

One-off funding breakdown

Table 43 provides a breakdown of the one-off council funding RTOs received, along with total amounts and funding purposes

Table 43: One-off council funding breakdown by RTO

Tier	Entity	Total one-off funding amount	Description of funding
1	Tātaki Auckland Unlimited	$65,000	Auckland Council Māori outcomes work
	WellingtonNZ (EDA)	$120,000	Destination Management Programme Resource (Destination Wellington WCC)
		$100,000	Delivery of Low-Carbon Visitor Economy Sustainability Programme (Destination Wellington WCC)
		$40,000	Local central business district promotion (Destination Wellington WCC)
		$25,000	Expansion of the Low-Carbon Visitor Economy Sustainability Programme (Destination Wellington WCC)
		$20,000	Civics Experience Programme Development (Greater Wellington Regional Council)
		$101,890	i-SITE refurbishment (Wellington City Council – matched by MBIE)
3	CEDA (EDA)	$20,000	Support of marketing campaign
		$129,164	Contribution to Te Utanganui distribution hub initiative
4	Nelson Regional Development Agency (EDA)	$16,263	Visitor Information Ambassador Programme
5	Venture Timaru (EDA)	$60,000	Cruise sector work

Targeted rate breakdown

Table 44 provides a breakdown of the funding RTOs received from targeted rates, including total amounts and descriptions of the rates applied.

Table 44: Targeted rate funding breakdown by RTO

Tier	Entity	Total targeted rate amount	% of council funding	Description of rate(s)
1	Destination Queenstown	$4,950,000	95%	Tourism promotion levy (commercial only, member-decided)
	Enterprise Dunedin (EDA)	$500,000	11%	Economic development rate (tourism)
	Tātaki Auckland Unlimited	$1,117,000	7%	City centre targeted rate
	WellingtonNZ (EDA)	$6,032,000	94%	Downtown targeted rate
2	RotoruaNZ (EDA)	$3,400,000	100%	Economic development targeted rate
	Tourism Bay of Plenty	$2,056,523	75%	Tauranga City Council - commercially rated properties
3	Destination Marlborough	$909,288	100%	Commercial rate
		$204,430		Tourism targeted rate
	Lake Wānaka Tourism	$1,235,000	95%	Tourism promotion levy (commercial only, member-decided)
	Tourism Central Otago	$1,192,189	100%	Tourism – targeted rate with property type differential
4	Destination Hauraki Coromandel	$137,986	52%	Rate – capital value differential by district for commercial or industrial properties
		$209,793		Economic development targeted rate
	Mackenzie Tourism (EDA)	$520,504	81%	Tourism & Economic Development Targeted Rate
	Visit Ruapehu	$170,000	74%	Non-commercial visitor accommodation rate
		$310,000		Commercial rate

5	Destination Kaikōura	$255,000	100%	Commercial rate
	Hurunui Tourism	$276,085	100%	Targeted tourism rate
		$71,717		Contribution from Hanmer Springs Thermal Pools & Spa

Other council funding sources

In addition to general and targeted rates, several RTOs receive funding from other council-related sources, which collectively contributed $1.6 million in 2024/25. Table 45 provides a breakdown of these additional income streams by RTO.

Table 45: Other council funding sources

Tier	Entity	Total amount	Description of "other" sources
1	Tātaki Auckland Unlimited	$65,000	Long Term Plan
	WellingtonNZ (EDA)	$583,957	Destination Wellington; Regional Economic Development (GWRC); Regional Trails (9 funding councils); WCC CAPEX (i-SITE)
2	Hawke's Bay Tourism	$120,000	Initiative investment; Event sponsorship
	Tourism Bay of Plenty	$86,520	Whakatane District Council Service Contract
3	Trust Tairāwhiti (EDA)	$745,700	MBIE

Notes

33 The reported amount of $745,700 for Trust Tairāwhiti is listed as income from "MBIE". However, without further context, it is unclear whether this represents central government funding. In the absence of definitive clarification, we have retained it in this category.

Central government funding streams

Table 46 provides a breakdown of central government funding by RTO, including the total amount received during the financial year, the total one-off funding component, source agencie(s), and the purpose of the funding.

Table 46: Central government funding breakdown

Tier	Entity	Total funding	One-off funding	Source agency	Purpose of funding
1	ChristchurchNZ (EDA)	$1,268,243	$1,268,243	MBIE; Tourism New Zealand, Creative NZ	Capability building for Buskers Event; Creative and cultural events incubator; ICCA sponsorship; Regional Events Fund; Regional Tourism Boost
	Enterprise Dunedin (EDA)	$30,000	$30,000	MBIE	Regional Event Promotion Fund
	Tātaki Auckland Unlimited	$2,530,084	$2,530,084	MBIE; TNZ	Business Events Subvention Fund;[19] Pasifika 2025; Regional Investment Fund; Regional Tourism Boost
	WellingtonNZ (EDA)	$952,050	$740,000	Lotteries Commission; MBIE	Destination Management Project - Civics Footsteps of Change; Electrifying the Great Rides; Tourism Boost Central NZ collective.
2	Hawke's Bay Tourism	$868,725	$867,725	MBIE	Post-cyclone recovery; Regional Events Fund (last tranche, post-covid); Regional Events Promotion Fund
	Tourism Bay of Plenty	$537,666	$-		
3	CEDA (EDA)	$307,854	$232,690	Internal Affairs Lotteries grant; Ministry Business,	He Ara Kotahi, Hei Ara Korero project; Regional Event Promotion Fund

19 The $132,000 reported for the Business Events Subvention Fund may not have been received directly by Tātaki Auckland Unlimited, but rather through a related entity such as a regional convention bureau. Due to the relatively small value, this has not been further disaggregated.

				Innovation & Employment	
	Tourism Central Otago	$86,607	$86,608	MBIE	Regional Event Promotions Grant
4	Nelson Regional Development Agency (EDA)	$319,954	$134,954	MBIE	Te Tauihu Regional Events Fund and REPF, administration costs including salary costs for administering the fund (does not continue in 25/26)
	NorthlandInc (EDA)	$796,850	$796,850	MBIE Resilience; NZTA; Regional Events Funding	
	Destination Hauraki Coromandel	$128,138	$128,138	MBIE	Regional event fund; Regional events promotion fund
	Destination Wairarapa	$56,625	$56,625	MBIE	Regional Events Promotional Fund
	Great South (EDA)	$122,500	$373,000	MBIE	Regional Events Promotional Fund ; Regional Tourism Boost Fund
	Mackenzie Tourism (EDA)	$95,584	$95,584	MBIE Regional Events Fund	Regional Events Fund: Covid recovery to support event sector and stimulate domestic demand via events
	Visit Ruapehu	$45,500	$45,500	MBIE	Regional Events Promotion
	Whanganui & Partners	$180,300	$180,300	MBIE	Regional Events Promotional Fund

Other income sources

Some RTOs also reported income from non-government grants, donations, or sponsorships, as well as other miscellaneous sources. Table 47 provides a breakdown of these income streams by RTO.

Table 47: Revenue from other sources

Tier	Entity	Income from other sources	Description of other funding sources
1	Tātaki Auckland Unlimited	$2,020,000	Operational revenue from commercial activities like stallholder fees, rentals, memberships.
	WellingtonNZ (EDA)	$275,000	VIK hotels, VIK Wellington City Ambassador Programme hours, VIK famils (operators / accommodation / hospitality), CentrePort (cruise)
2	Hawke's Bay Tourism	$9,429	Interest
	Tourism Bay of Plenty	$32,879	Interest and dividends
3	CEDA (EDA)	$13,606	Interest
	Development West Coast (EDA)	$1,100,000	Parent organisation budget allocation
	Tourism Central Otago	$7,698	Investment Account Interest
4	Destination Hauraki Coromandel	$3,683	Interest
	Destination Wairarapa	$171,702	Interest ($3,430), banking hub hosting ($43,787), Wairarapa Monopoly sales and tourism services ($14,485)
	Great South (EDA)	$32,290	NA
	Venture Taranaki (EDA)	$15,000	NA
	Visit Ruapehu	$7,700	Interest
5	Clutha Development (EDA)	$195,000	Interest
	Venture Timaru (EDA)	$5,500	NA

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