HE PAE TUKUTUKU

Tourism 2050

A Blueprint for Impact

REFRESHED AUGUST 2026

TOURISM INDUSTRY AOTEAROA

He Mihi

Haere mai rā

E ngā iwi katoa

Ki te karanga a Pae Tukutuku e

Ka huri aku mihi ki a tātau katoa

Ki ō tātau mate huhua, tangihia, poroporoakitia

Hoatu koutou ki te aio o te rangi

Ahakoa kua ngaro i te tirohanga kanohi

Ka mau tonu i ngā whakaaro

He aha te mea nui o te ao, ko te whakautu, he tangata, he whenua. Koia ko te pukahu o ngā kaupapa i ahuru ai te tangata, i tiaki hoki te whenua

Koia nei te reo mihi ki runga i a tātau

Me te kaupapa e kawe nei tātau

Kāti, tēnā koutou e hika mā.

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Foreword | Pou mua

Tourism 2050 was created by the Aotearoa New Zealand tourism industry in 2023, as a way to clearly set out our ambitions for the future of tourism. It gave the industry a shared strategy, a clear vision and a practical framework for advancing tourism in a way that delivers for our environment, our economy, the people of New Zealand and our visitors.

Three years on, the purpose of Tourism 2050 remains as important as ever. New Zealand is again experiencing growth in tourism activity, with international arrivals, expenditure and visitor satisfaction remaining strong. Tourism continues to make a major contribution to national prosperity, regional economies, employment, government revenue and the experiences that help define New Zealand to the world.

At the same time, progress has been made on many of the actions and the operating context for tourism has changed. The industry is facing stronger global competition, more frequent disruption, climate change impacts, changes in visitor expectations, local government reform, rapid development in artificial intelligence, and continuing questions about how tourism is organised, funded and managed. These issues are not peripheral. They shape whether tourism can grow well and whether the benefits of tourism can be sustained over the long term.

Our refreshed strategy responds to that changed environment. It retains the essential architecture of Tourism 2050; the vision, the values, the application of te ao Māori principles, the balanced growth model and the ten-action structure. It updates these actions to reflect new evidence, progress made since 2023 and the new policy developments now shaping the tourism system. It also strengthens the focus on implementation, including who needs to act and how progress will be measured.

The central proposition remains balanced growth. We want a tourism industry that is healthy, prosperous and internationally competitive. We also want an industry that strengthens communities, protects and restores Te Taiao, is based on strong cultural foundations and increasing Māori participation, supports quality jobs, expresses our values, and enriches the experience of visitors and residents alike. These ambitions are not in conflict. The future of tourism depends on being successful across each of them.

In the face of strong global growth trends and the challenges now before us, how we manage tourism matters more than ever. New Zealand cannot assume that its position as a premier visitor destination will simply endure. It must be actively maintained through investment, capability, competitiveness, connectivity, destination management, care for place and people, and a tourism system that is organised and funded for the future.

Tourism Industry Aotearoa will use this refreshed strategy to lead advocacy, support industry action and maintain accountability for progress. It is a statement of what the industry wants, what needs to change, and how we will work with government, local government, iwi, regions, operators and partners to advance it.

Tourism 2050 sits alongside, and reinforces, New Zealand’s Tourism Policy Statement (TPS) that was released by Government in 2026.

Together they give tourism a shared, long-term direction. The TPS sets out Government's direction for tourism; Tourism 2050 sets out industry's and in several areas, it goes further, reflecting commitments only industry can make. Both documents are aligned and share the same priority: turning aspiration into implementation.

We are proud of the contribution tourism makes to New Zealand. We also have a clear view about the work required to ensure tourism grows positively and in a balanced way. This refresh is offered as the next step in that work, with confidence in the future of tourism and in the collective ability of the industry to help shape it.

We look forward to working with all our partners and collaborators in advancing Tourism 2050.

Geoff McDonald
Chair, TIA Tourism Council

Dame Kerry Prendergast
Chair, TIA Board

TIA Tourism Council

The TIA Tourism Council comprises of 12 sector representatives, one member appointed from Tourism New Zealand, one member appointed from Air New Zealand, one member Māori representative, one member Small Business Owner representative and two members co-opted by the Council.

Geoff McDonald (Chair), *Skyline Enterprises Group*

Kristin Dunne (Deputy Chair), *Miles Partnership*

Scott Tasker, *Auckland Airport*

Callum Mallett, *SkyCity*

Hannah Ballantyne, *RealNZ*

Deryck Shaw, *Holiday Parks New Zealand*

James Doolan, *Hotel Council Aotearoa*

Anna Black, *General Travel*

Matthew Harvey, *Tourism Holdings Limited*

Andrew Wilson, *Regional Tourism New Zealand*

Kiri Hannifin, *Air New Zealand*

John Barrett, *Kapiti Island Nature Tours and Nature Lodge*

Gavin Oliver, *Ecozip Adventures*

René de Monchy, *Tourism New Zealand*

Nicole Botting, *Te Rūnanga o Ngāi Tahu*

Tansy Tompkins, *Wellington Cable Car*

About Tourism 2050 | He Whakamāramatanga

Tourism 2050 – a Blueprint for Impact was released by the tourism industry in November 2023, as a ten-action framework designed to clearly convey our ambitions for the future of tourism and our plan for getting there.

Since then, the strategy has continued to demonstrate real influence across the sector. It has helped shape the Government's Tourism Growth Roadmap, informed TIA's advocacy across a wide range of policy areas, and provided a credible platform for engagement with Ministers, officials and local government.

However, the operating context for tourism has changed in ways that now require the strategy to be refreshed. Since Tourism 2050 was launched in 2023, important progress has been made against a number of its priorities. The Tourism Policy Statement has now been launched, providing strategic direction for the tourism system. There is active engagement on sustainable tourism funding, new business capability programmes such as Akiaki and new industry data products have been developed, Tiaki continues to strengthen, and significant reforms are underway to modernise the relationship between tourism and conservation.

At the same time, the environment within which tourism operates has continued to evolve. Geopolitical uncertainty, the rapid emergence of artificial intelligence, the need for a more structured response to climate resilience and adaptation and changes to local government are all shaping the future of tourism in Aotearoa New Zealand.

This refresh responds to both the progress made and the new challenges that have emerged. While it retains the core architecture of Tourism 2050, including the vision, values, balanced growth framework and ten action structure, it updates the actions to reflect new evidence, policy developments and industry experience since 2023. It also provides greater clarity around who is responsible for advancing key actions, helping the strategy to continue driving meaningful progress for the tourism industry.

The values that gave Tourism 2050 its character remain unchanged:

Kaitiakitanga

Guardianship and protection of our natural, built and cultural resources for the benefit of current and future generations.

Manaakitanga

Showing respect, hospitality, generosity and care for others.

Whanaungatanga

A sense of family and belonging built through shared experiences and working together.

The two future horizons continue to organise the programme:

Horizon 1

Covers the period from now to 2030 and focuses on putting the right foundations in place.

Horizon 2

Covers 2030 to 2050 and describes the commercially successful, net carbon zero, high-value industry we are working toward.

The actions set out in this document are primarily over Horizon 1 and are designed to make strong progress in the near term, while setting the conditions for the longer-term ambitions present in Horizon 2. Refer to the outcomes and targets section of the Blueprint for the aspirations we have set for Tourism 2050.

Where we are right now | Tāpoi ki Aotearoa

Tourism is delivering strong outcomes for Aotearoa New Zealand. The indicators below show an industry that is growing in value, supporting jobs and communities, delighting visitors and maintaining strong support from New Zealanders. They provide an evidence-based picture of the industry today and the platform from which Tourism 2050 will be advanced from.

EXPENDITURE

$28.5b

Domestic Tourism Expenditure

$18.1b

International Visitor Expenditure

Source: Tourism Satellite Account, YE March 2025

GST

$2.5b

Domestic

$1.9b

International

Source: Tourism Satellite Account, YE March 2025

GDP

$30.6b

Tourism GDP Contribution – direct and indirect

Source: Tourism Satellite Account, YE March 2025

7.7%

Tourism GDP Contribution as percentage of total GDP (%)

Source: Tourism Satellite Account, YE March 2025

EXPORTS

17%

International tourism as percentage of export industry (%)

Source: Tourism Satellite Account, YE March 2026

VISITORS

3.65m

International Arrivals

+12%

International Visitor Spend Growth

$4,386

Average annual spend per international visitor

Source: International Visitor Arrivals YE April 2026

COMMUNITY SENTIMENT

94%

NZers who think International Tourism is Good for NZ

94%

NZers who think Domestic Tourism is Good for NZ

Source: Views on Tourism: New Zealand, YE March 2026

VISITOR SATISFACTION

88%

SATISFIED TO VERY SATISFIED

Domestic Visitor Overnight Satisfaction

Source: Domestic Visitor Survey October 2025 Wave

91%

SATISFIED TO VERY SATISFIED

International Visitor Satisfaction

89%

SATISFIED TO VERY SATISFIED

International Visitors Enjoying Māori Cultural Experiences

68

Net Promoter Score – International Visitors

Source: International Visitor Survey, YE March 2026

EMPLOYMENT

327,888

Direct + Indirect Tourism Employment

11.4%

Tourism Share of NZ Employment

Source: Tourism Satellite Account, YE March 2026

What has changed since 2023 | Whakaaweawe te ao tāpoi

Several forces have shifted significantly since Tourism 2050 was first published. These are not peripheral changes. They alter the environment in which the industry operates and the strategic choices it must make.

Tourism is a global industry, and Aotearoa New Zealand competes within a large and dynamic international marketplace. Although New Zealand is recognised globally as a premium destination, it captures less than one percent of worldwide international tourism expenditure, underscoring both the scale of the global market and the opportunities that lie ahead.

Continued growth in aviation and cruise capacity, the expansion of the global middle class and the normalisation of travel as part of modern life, all point to an industry that will continue to grow over the decades ahead. Both aviation and cruise capacity globally is forecast to double by 2044.

Within this international context, New Zealand has its own distinct tourism system shaped by the way the industry is structured, funded and managed, and by the choices we make around sustainability, destination stewardship and industry development, and recognising the rise of Māori tourism. These factors formed the basis of the original Tourism 2050 actions.

As we look ahead in 2026, the following factors are particularly important to the future of New Zealand tourism:

Geopolitical disruption

The global rules-based order that has underpinned international trade and travel since the Second World War is under increasing pressure, creating greater risks of disruption to trade, investment and tourism.

Most recently, the Iran conflict that commenced in February 2026 disrupted global oil supplies, disrupted international aviation and supply chains, increased fuel and consumer costs, and introduced new uncertainty into international travel behaviour. While past experience tells us tourism is resilient and will recover, the duration of the current disruption and its impact on consumer confidence remain uncertain.

Disruptive events are now a recurring feature of the operating environment rather than exceptional circumstances. The tourism industry therefore needs agile and resilient structures, capability and contingency planning to build its capability to anticipate, respond to and recover from future shocks.

Artificial intelligence

Artificial intelligence has moved from an emerging consideration to a fundamental feature of how tourism operates. On the demand side, it is reshaping how travellers discover destinations, build itineraries and make booking decisions. On the supply side, it is transforming marketing, customer relationship management, business intelligence and the automation of operational systems. Through this, AI is playing an increasing role in destination discovery, industry productivity, workforce capability and customer experience transformation.

For a small, long-haul destination like New Zealand, the implications are significant. Our visibility in an AI mediated travel environment cannot be assumed. It must be actively designed for, invested in and continually maintained.

Beyond tourism itself, AI is changing how economies, businesses and societies operate. To remain competitive, the tourism industry will need to adapt quickly to these changes and harness the opportunities they create. This will require deliberate action at both a system level and within individual tourism businesses.

New Zealand's Tourism Policy Statement

In 2026, a key action of Tourism 2050 was advanced with the release by Government of New Zealand's Tourism Policy Statement. The TPS sets out the long-term direction for the visitor economy, and it serves to define the structure of the industry and the roles and responsibilities within it, including central government, local government and industry. The TPS also sets out the tourism policy objectives of Government with these having important commonality with Tourism 2050.

Under each of the policy objectives there are policy actions that are of particular relevance to Tourism 2050, including future funding arrangements, transparency for short-term rental accommodation, tourism data and insights, lifting productivity, and others.

With the TPS in place, there is greater opportunity to work jointly on those key matters of shared interest of Government and industry.

Climate change and extreme weather

The frequency and severity of extreme weather events affecting New Zealand is increasing. The 2023 Auckland Anniversary floods and Cyclone Gabrielle were the two largest weather-related insurance events in New Zealand's history, generating insurance claims of $3.8 billion and exceeding previous weather-related insured losses by more than a factor of ten.[1]

The Insurance Council of New Zealand has identified that insurers are beginning to retreat from higher risk areas through the application of risk-based pricing. This is affecting the affordability and availability of insurance in some parts of the country, with many tourism businesses operating in areas exposed to natural hazards likely to face rising insurance costs.

While the tourism industry has the Aotearoa Circle Tourism Adaptation Roadmap as an analytical foundation,[2] further work on climate resilience and adaptation remains to be done. Most notably, there is no tourism climate resilience plan in place. This represents a significant gap between where the industry is today and where it needs to be to adapt to the impacts of a changing climate.

Local government reform

Government is undertaking reforms that are reshaping how local government will operate. Current settings do not define tourism as a core council function and proposed rates caps and council amalgamations risk reduced local government investment on their tourism-related functions.

Local government is the third leg of the tourism system alongside central government and industry, responsible by default for the infrastructure, amenities and services that make destinations work.

The risk that local government's capacity to fulfil these roles is eroded through reform is a concern. Any reduction in destination management, destination promotion or tourism related investment would weaken the tourism system and limit the ability of destinations to evolve in line with visitor, community and industry needs.

Changing visitor profile

By 2030, the majority of international visitors are likely to come from younger generations who are more digitally connected, more values driven and more likely to research, plan and book their travel online. They will expect seamless digital tools and experiences throughout their journey, while still valuing the personal connections and authentic hospitality that define New Zealand's visitor proposition.

1 Automobile Association, 2025
2 Aotearoa Circle, Tourism Sector Climate Change Scenarios, 2023

Operators that fail to meet these expectations risk losing competitiveness. The industry will need to be agile in adopting and integrating digital tools across the visitor journey before, during and after travel. Getting this right presents a significant opportunity to enhance visitor experiences, strengthen competitiveness and increase value from tourism.

Global competitiveness

New Zealand is not competing in a static marketplace. Other destinations are investing heavily in marketing, infrastructure, digital capability and aviation and cruise connectivity to attract visitors and strengthen their competitive position.

We compete in a dynamic global tourism market shaped by changing consumer preferences, travel costs, safety perceptions, social media influence, emerging destinations and shifting travel trends. Demand can change quickly, and destinations must continually earn their place in travellers' consideration sets.

To succeed in this environment, New Zealand must remain competitive as a destination and maintain its visibility in key markets. This requires ongoing investment in destination marketing, connectivity, visitor experiences and the broader factors that influence destination choice.

Connectivity

For a remote destination, connectivity is not simply a transport issue; it is a core component of destination competitiveness.

For aviation, the routes available, the capacity deployed and the frequency of services all influence both New Zealand's ability to attract visitors and the cost of travel. The wider and more competitive the network, the greater the opportunity for tourism growth. With global aviation capacity forecast to grow strongly over the coming decades, New Zealand has an opportunity to expand connectivity in line with demand but also needs to remain an attractive market for airlines.[3]

Cruise connectivity is determined by the attractiveness and competitiveness of New Zealand as a destination for cruise operators. Recent regulatory and cost pressures have contributed to a 40% reduction in cruise visitation for the 2025/26 season despite continued growth in the global cruise market. The cruise industry cites New Zealand as being one of the most expensive destinations in the world for cruise operations, thereby impacting the competitiveness of the sector and its ability to grow.[4]

In both aviation and cruise, connectivity is fundamentally a commercial decision made by operators within the broader operating environment of the destination. Policy settings, regulatory frameworks, infrastructure, costs and market demand all influence the decisions that these operators make on where to deploy their available aircraft or ship capacity in order to realise the best possible commercial returns.

Domestic tourism

Domestic tourism expenditure is $28.5 billion and accounts for 61% of total tourism spending. It remains the foundation of many tourism businesses and destinations, particularly outside peak visitor periods.

Since 2023, domestic travel has become increasingly influenced by broader economic conditions. Cost of living pressures have increased price sensitivity among New Zealand travellers, affecting travel frequency, trip duration and spending patterns. These impacts are not being felt evenly, with some destinations and sectors more exposed to changes in domestic demand than others.

In this environment, destination promotion, regional events and other initiatives that stimulate domestic travel continue to play an important role in supporting tourism activity, regional economies and business resilience throughout the year.

Tourism and conservation

The nature of tourism and the role it plays in conservation is evolving, with DOC a major recipient of IVL funds and as tourism operators are seen as partners in conservation, whether from raising funds, direct conservation efforts and talking to visitors about our natural environment and how we care for it. Increasingly, tourism is seen as complementary to our national conservation efforts, and this in turn aligns to the interest of our international visitors, many of whom are drawn to our country by our nature and our stewardship of it.

3 Boeing Commercial Market Outlook, 2025; Airbus, Global Market Forecast, 2025; IATA, Long Term Air Passenger Demand projections, 2026.
4 Cruise Lines International Association, Media Release, August 2024

Māori tourism growth and influence

Research commissioned by New Zealand Māori Tourism and undertaken by BERL has quantified the role of Māori tourism in the New Zealand economy. Released in 2025, this established that in 2023, Māori tourism accounted for $1.2 billion of gross domestic product (GDP), an increase from $975 million in 2018. The research also highlighted the diversity of Māori tourism businesses across large and small businesses to Māori collectives, such as Māori trusts and commercial entities. Overall, there were 3,595 Māori tourism businesses, employing over 15,000 people. The size and growth of the Māori tourism sector highlight the importance and trajectory of the Māori tourism economy.

Growing infrastructure requirements

The quality of New Zealand's visitor experience depends on the infrastructure that supports both visitors and communities. As tourism grows, some destinations are facing infrastructure constraints that are affecting visitor experiences, community support for tourism, business productivity and the ability to grow sustainably.

Tourism uses a wide range of public infrastructure such as transport networks and water and wastewater services, as well as tourism-enabling infrastructure such as public amenities, visitor facilities, airports, ports, cycle trails, and tourism climate resilience investments. These assets support both residents and visitors, meaning that tourism growth must be considered as part of wider infrastructure planning and investment decisions.

The Government's 2026 National Infrastructure Plan recognises tourism as an important driver of infrastructure demand and highlights the challenges faced by destinations with high visitor numbers and relatively small resident populations. This provides an opportunity to better align long term infrastructure planning and investment with the needs of the visitor economy, supporting balanced tourism growth across New Zealand.

The tourism we want to create in New Zealand | Te waihanga

Tourism is a strategic asset for Aotearoa New Zealand. It contributes to our economy, supports communities, showcases our culture and environment and connects New Zealand to the world.

As we look to the future, the question is not whether tourism should grow, but how it should grow. The choices we make will determine the type of industry we create and the benefits it delivers for visitors, businesses, communities and the environment.

Tourism 2050 sets out a vision for a flourishing industry that enriches our country and its people. We see a future where tourism is prosperous, resilient and valued by New Zealanders as a positive force for our economy, communities, culture and environment. That vision can be seen in the kind of tourism system we are working to create across the country:

- Tourism businesses are productive, profitable and innovative, creating value for their owners, employees, investors and the communities in which they operate.
- Visitors enjoy world class experiences that are increasingly personalised and supported by technology, while retaining the authentic and human connections that define Aotearoa New Zealand.
- Tourism applies Māori principles of Hapori, Manuhiri, Ōhanga and Te Taiao that underpin how the tourism system operates.
- Māori businesses, culture, values and knowledge form an increasingly important part of the visitor experience, providing a distinct point of difference and strengthening New Zealand's position as a visitor destination.
- Domestic travellers continue to enjoy and explore their own country, supporting tourism businesses, destinations and regional economies throughout the year.
- Communities welcome tourism because it contributes positively to their place, identity, vibrancy and quality of life.
- Tourism operates to a strong sustainability ethos where deliberate steps are taken to reduce emissions and waste, create great jobs, partner with communities and cultures, and strives to be regenerative over time.
- Nature is flourishing as tourism actively contributes to conservation, biodiversity restoration and the protection of the places that make New Zealand special.
- Destination New Zealand is actively managed and developed, with national, regional and local efforts working together to enhance the quality, sustainability and competitiveness of the visitor experience.
- Strong destination promotion, regional events and effective destination management continue to support visitor demand, regional dispersal and year-round economic activity.
- Tourism is supported by sustainable funding, high quality infrastructure and ongoing investment that enables destinations, businesses and communities to thrive.
- The tourism industry operates within a well organised system, with clear roles, responsibilities and constructive partnerships between industry, local government and central government.
- The industry is resilient and adaptable, able to respond to technological change, climate challenges, market shifts and future disruptions.

Tourism continues to grow in a way that enhances New Zealand's reputation as a high-quality destination while delivering lasting benefits for current and future generations. To achieve this future, growth must be balanced across the outcomes that matter most for Aotearoa New Zealand.

Balanced growth in tourism

For the tourism industry, balanced growth refers to the even and sustainable development of various tourism related components within a region or destination.

It involves ensuring that different aspects of the tourism industry, including demand characteristics, infrastructure, attractions, accommodation and services, develop in a way that complements each other and delivers benefits to the destination, whether national, regional or local.

The goal is a well-rounded, resilient tourism ecosystem - one that isn't over-reliant on any single part, keeps demand and supply in balance, and delivers positive outcomes across the economy, visitors, community, culture and environment.

Sustainability towards regenerative

There are several terms for the positive role that tourism can and must deliver, including 'sustainability', 'regenerative', 'positive impact tourism', 'restorative' or 'net positive'. These lie on a spectrum, and each has merit.

What is more important is the underlying principle around the sort of industry we want to be, the essence of which is a positive industry, an industry for the good of all those it encounters.

The spectrum allows us to treat different parts of the industry in line with their level of progress. For instance, in some areas we may be regenerative, or close to it, whereas in other areas we have a way to go.

It is important to recognise these differences and the reasons for them, so we can broadly advance the industry as quickly as possible towards that regenerative position, even if the pace of change will be uneven across the industry.

This Blueprint is designed to drive positive change and to set the bar high, without making disingenuous claims. Integrity in how we take this forward is of utmost importance.

Our 2050 vision | He pae tukutuku

Enriching Aotearoa New Zealand through a flourishing tourism ecosystem.

This vision sets the aspiration for the tourism industry to be a prosperous, sustainable and distinctly New Zealand tourism industry that contributes broadly to the wellbeing of our country, its people and the natural world.

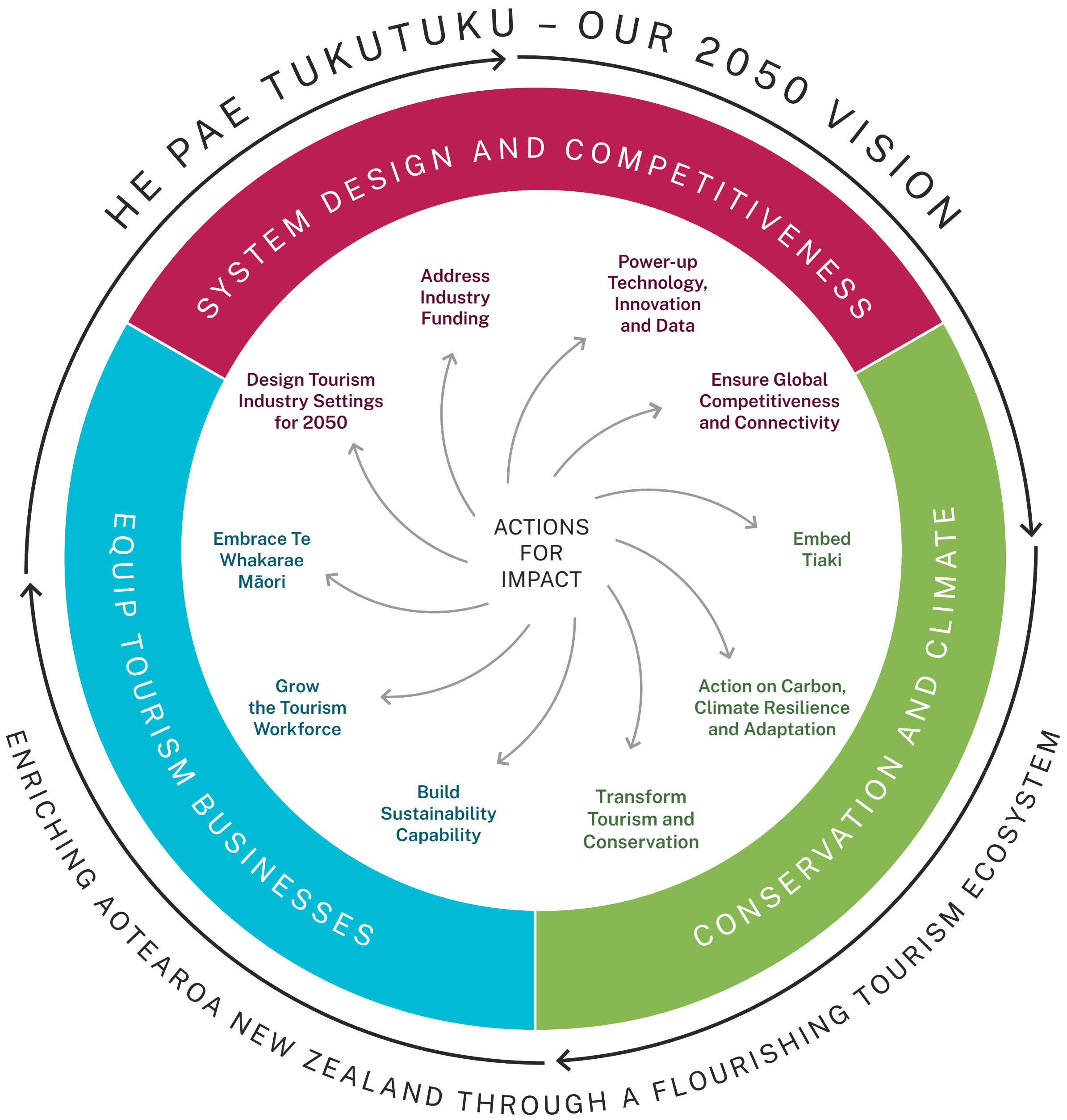
It is in step with the Government aspiration for tourism as expressed in the New Zealand's Tourism Statement.

He Pae Tukutuku symbolises the evolving relationship between tourism, visitors, and the people of Aotearoa New Zealand. It embodies the essence of a positive and reciprocal future where tourism seeks to honour and enhance the intricately woven elements that make Aotearoa New Zealand unique.

Tourism 2050 – A Blueprint for Impact

Outcome 1: Hapori (Community)
Enhance the vibrancy, culture, health and quality of life of local communities.

Outcome 2: Manuhiri (Visitor)
Provide timeless experiences that differentiate Aotearoa New Zealand in the minds of manuhiri (local and international).



Outcome 3: Ōhanga (Economic)
Support productive and prosperous tourism businesses and the Aotearoa New Zealand economy.

Outcome 4: Te Taiao (Environment)
Invest in the protection, restoration and enhancement of Te Taiao (our natural world).

ACTION 01

Ensure global competitiveness and connectivity

The belief

New Zealand's position as a premier long-haul destination is not guaranteed. It must be actively maintained through strong aviation links, cruise attractiveness, competitive destination marketing (including by TNZ, airlines and inbound operators), satisfied visitors, sustainability, strong trade networks and a coherent response to AI-mediated travel. Equally, there needs to be balance across the supply and demand sides of the industry which is central to industry viability, visitor satisfaction and community support.

Context

Aviation connectivity is the most important structural enabler for international tourism. New Zealand must compete with other destinations for the deployment of globally scarce aircraft capacity by airlines in order to facilitate the growth of inbound visitation over time. For many airlines, New Zealand is a long-haul destination proposition that is both operationally and commercially challenging. To grow New Zealand's air capacity and connectivity over time, airlines need to have confidence that demand for travel is robust and that the country has competitive industry settings.

Domestic connectivity is equally important, including aviation, ferry services and road transport. By nature, New Zealand is a tourism destination meaning that our domestic transport modes need to function well and meet the expectations of our visitors. The state highway network is likely to be New Zealand's most used tourism asset.

At the same time, New Zealand operates within an increasingly competitive global tourism marketplace. Destinations around the world are investing heavily in marketing, aviation and cruise attraction, visitor experiences, major events and business events to strengthen their competitive position. Globally, demand stimulation from effective destination marketing is a proven tool for growing and shaping tourism. Tourism New Zealand is the primary demand generator for the industry and plays a central role in ensuring New Zealand remains visible and competitive to achieve the industry's goal for tourism's total expenditure to reach $55 billion by 2030.

The way visitors discover, evaluate and book travel is also changing rapidly, including through off-shore travel agents, tourism wholesalers, inbound tour operators, airlines and Online travel agents (OTAs). In this context, artificial intelligence is increasing the importance of how destinations present themselves in digital channels and is reshaping the competitive environment in which destinations operate. Being AI competent and trusted will increasingly be a driving and pivotal factor in our overall competitiveness as a visitor destination.

Business events and major events are important drivers of destination competitiveness. They attract high value visitors, support demand outside of traditional peak periods, generate international profile and help stimulate regional economies. Maintaining a strong pipeline of events and leveraging new, high-quality infrastructure like NZICC and One New Zealand Stadium, and ensuring New Zealand remains competitive in attracting them is an important part of growing visitation.

The cruise industry is an important aspect of tourism connectivity generating an estimated direct economic output of $574.6 million.[5] Cruise also plays an important role in regional dispersal by bringing international visitors directly into destinations throughout the country. However, cruise visitation has declined by around 40 percent despite continued global cruise growth[6], reinforcing that deployment decisions are being made in favour of competing destinations and that New Zealand cannot assume cruise visitation will return to previous levels on its own.

5 New Zealand Cruise Association, The Value of Cruise Tourism 2024/25, 2025
6 New Zealand Cruise Association, Cruise Aotearoa New Zealand 2040, Horizon 2 Transition Strategy,

There are many elements that make up a competitive destination, including the quality of the experience, ease of access and travel, value for money, destination marketing, event attraction, museums, galleries and festivals, levels of charges and taxes, host community support and the overall visitor experience. Māori culture, creativity and story-telling provide a powerful layer to who we are as destination Aotearoa New Zealand and our uniqueness globally.

The quality of the visitor experience is critical to our value proposition. The Manaaki, or hospitality, we show to our visitors is a defining attribute of New Zealand tourism, and this requires deliberate focus. Also, as AI becomes more widely applied, the personal touch will become increasingly important to the tourism experience.

Responsibility for these factors sits across industry, central government and local government yet there is currently no whole of system mechanism for monitoring, coordinating and responding to emerging competitiveness challenges. The tourism industry itself has a direct responsibility to deliver high-quality experiences that meet or exceed visitor expectations and maintain the current Net Promoter Score for New Zealand.

1

Industry to advocate to Government to restore and maintain Tourism New Zealand's baseline funding at a level commensurate with competing long-haul destinations, recognising that destination marketing directly generates a return on investment (ROI) from increased visitor expenditure and tax revenues that funds public services.

2

Industry, including airports and airlines, and Government to partner to actively support the success of established and the consideration of new aviation routes through demand stimulation; and to co-operate to ensure that New Zealand has globally competitive aviation industry settings.

3

Industry to engage with Government to develop a specific strategy for AI-enabled visitor discovery and booking, ensuring New Zealand's destination proposition is visible, compelling and accurately represented in an AI-mediated travel environment.

4

Industry to engage with Government to actively support the cruise industry strategy and targets to achieve $1 billion in direct cruise expenditure contribution by 2040 and 90% visitor satisfaction across New Zealand regions.

5

Industry to engage with Government to ensure domestic connectivity including regional aviation, Cook Strait ferry services and roading is maintained and developed as a tourism enabler, particularly for regional dispersal and shoulder-season demand.

6

Industry to engage with Government to support the attraction and growth of business events and major events as strategic drivers of international visitation, supporting regional and seasonal dispersal, economic development and destination competitiveness.

7

Industry to engage with Government to maintain an integrated view of the total charges and taxes levied on international and domestic visitors and which are impacting the competitive position of destination Aotearoa New Zealand.

8

Industry to continue to prioritise the delivery of an exceptional and sustainable visitor experience as a key determinant of the future success of the tourism industry.

ACTION
02

Design industry settings for 2050

The belief

Tourism cannot achieve its potential while responsibility for it is fragmented, informal and under-resourced across central government, local government and industry.

There are significant gains to be achieved from having well organised and clearly mandated structures for the tourism industry. Establishing clear roles, responsibilities and functions will help create a cohesive policy framework that supports the long-term growth and development of tourism.

Ultimately, the industry must have the capability, partnerships and delivery mechanisms to drive the actions and change we aspire to.

Context

Tourism operates largely through informal arrangements. Tourism New Zealand is the only tourism-specific function formally established in legislation, through the New Zealand Tourism Board Act 1991. The wider functions and responsibilities that support tourism remain largely undefined and unmandated, meaning parts of the system cannot operate as needed and are poorly positioned to defend their roles against competing priorities.

Tourism 2050 identified this structural deficiency as a key inhibitor of industry progress and welcomes the TPS as the vehicle for providing direction to all parties across the tourism system. The TPS sets out the structure of the tourism system, the roles and responsibilities within it, and what needs to be done by Government to implement it.[7]

Three specific issues have emerged that require attention:

1. There is industry concern that local government reform is narrowing the defined core functions of councils in ways that do not include tourism. Together with this narrowed purpose and rates caps and likely council mergers, the ability of local government to invest in tourism for community and economic benefit is under increasing pressure. The implications are material with local government largely funding regional tourism organisations across the country, including their roles around destination management, visitor demand, industry capability placemaking and stakeholder alignment, all of which are key parts of the tourism system. Without council investment in infrastructure and placemaking, visitor pressure points will not be fixed, impacting the quality and capacity of the industry and, critically, its community support.
2. Destination management has no clear point of national responsibility in New Zealand. This vital function is informally undertaken by councils within their own jurisdictions, with no connection to a national approach. International comparators including Ireland and Scotland have national destination management functions that proactively manage and develop tourism for broad benefit. New Zealand has a national destination framework for regional use but lacks the mechanism to produce a national plan. This gap inhibits holistic management of destination pressures, development of emerging regions, investment in new products and experiences and progress on quality, sustainability and workforce issues. The question of whether New Zealand should establish a national destination management authority, the role it will play and how it will interface with existing system structures is now under active consideration. Such a national destination function should include partnership with Māori to ensure Māori perspectives in the destination plan.

7 TIA, Sustainable Tourism Funding, March 2025

3. Short-term rental accommodation has emerged as a significant provider across the country. The industry supports innovation and advocates for a level playing field between new and traditional providers. A national regulatory framework and a compulsory registration and data-sharing system are needed to provide transparency and enable effective management of the sector.

Progress

A major industry milestone was reached with the preparation and release of New Zealand's Tourism Policy Statement by Government in 2026, a process strongly supported by TIA and the wider industry.

The challenge now is to empower the TPS to drive the change needed across the tourism system. We see the TPS as a live document that will develop over time and may ultimately lead to tourism-specific legislation to embed the roles and functions of the tourism system in law.

1

Industry to actively engage with, and support, the implementation of New Zealand's Tourism Policy Statement, advocating for its strengthening over time as the primary policy vehicle for tourism system design.

2

Industry to advocate to Government to further and clearly mandate tourism as a core function of local government, protecting councils' ability to invest in destination management and visitor infrastructure.

3

Industry to engage with Government to investigate establishing a national destination management function, modelled on proven international examples including Failte Ireland and VisitScotland, to provide overarching strategy, coordination and accountability for destination development across New Zealand.

4

Industry to advocate to Government to urgently establish a national regulatory framework for short term rental accommodation, including a compulsory registration and data sharing system to enable the oversight and management of this sector.

5

Industry to advocate for a long-term, cross-party approach to tourism development, investment and destination management through ongoing implementation and evolution of the TPS in parallel with the implementation of Tourism 2050.

6

Industry to engage with central and local government to advance priority tourism and tourism related infrastructure required to support balanced growth and destination development.

ACTION

03

Address Industry Funding

The belief

The tourism system is systemically underfunded. This imbalance must be corrected if the industry is to achieve its potential and if local government is to play its critical role in the tourism system. The outcomes we are seeking that will result from appropriate funding include better visitor experiences, conservation outcomes, community buy-in, resilient infrastructure, and vibrant regional economies and business communities.

Context

Tourism requires ongoing investment to improve quality, drive innovation and lift productivity. The current funding model for tourism is deficient and impeding industry growth and development.

There are parts of the tourism system that are not constrained:

- Central government is a significant beneficiary of tourism. Research by Sapere identifying government revenue from tourism of $10.5 billion and expenditure on tourism of $1.4 billion, a surplus of $9.1 billion annually.
- Commercial tourism businesses continue to invest in new products, experiences and services, and there is no evidence of a structural funding constraint in this area.

The structural funding deficits lies with:

- Local Government has significant tourism related responsibilities, including tourism-related infrastructure, destination management, events, amenities, climate change transition, and systems to support and enable tourism to thrive.
- Industry-good functions, including business capability, workforce development, tourism performance data and research, innovation, industry strategy, climate change adaptation, sustainability, and others.

This highlights that central government financially benefits from tourism, that commercial tourism is firmly self-sufficient, but that local government and industry-good functions do not currently have sustainable funding arrangements in place to enable the entire tourism system to operate as we need it to.

It is estimated the additional funding need is a minimum of $250 million per annum across these local government and industry areas, with local government funding being the greater part of it.

Three funding problems need to be addressed simultaneously.

First, the International Visitor Conservation and Tourism Levy which was raised to $100 per person in 2024 and is generating approximately $1 billion over five years. However, the majority of these funds are currently being used to replace baseline appropriations for Tourism New Zealand and the Department of Conservation rather than to fund additional tourism and conservation activity. This is contrary to what visitors are told when they pay the levy, and it means the transformational investment the IVL was designed to enable is not being delivered. Greater transparency of IVL spend is needed for maintaining industry and community confidence.

Second, the baseline appropriations for Tourism New Zealand and DOC visitor facilitation functions have been eroded and must be restored.

Third, local government bears significant destination management costs with only the rating base to fund them, creating a structural deficit that no current mechanism addresses. A broad industry levy, such as a national accommodation levy, along with recognition of existing industry-related contributions, represents a viable option for this third problem if done well. There is broad industry consensus that a national approach is preferable to fragmented regional solutions.

Progress

Significant progress has been made in building recognition of the tourism system's funding challenges and the need for structural reform.

Attention is now shifting from identifying the problem to investigating and advancing practical funding solutions that support local government tourism functions, industry-good activities and investment in the tourism system over the long term.

Given the shared interest in resolving these issues, progress will require collaboration between central government, local government and industry.

1

Industry to advocate to Government to reinstate IVL funds for investment in additional tourism infrastructure and conservation rather than replacing core baselines, delivering the transformational outcomes the levy was designed and communicated to visitors to achieve.

2

Industry to advocate to Government to restore baseline appropriations for Tourism New Zealand and the Department of Conservation so that IVL funds deliver additional investment rather than substitution. This includes ensuring budgets for both agencies are established at appropriate levels.

3

Industry to advocate to Government to establish transparent governance and public reporting solutions for all tourism-related funding flows including an IVL investment plan, so that visitors, industry and communities can see how funds raised from tourism are collected, governed and used.

4

Industry to advocate to advance new funding mechanisms to address identified structural tourism system funding constraints, potentially a modern national tourism levy on accommodation usage across the country, referred to as a bed tax, while undertaking deep industry engagement to explore funding options, assess costs and benefits, and determine how funds raised will be used in line with their purpose.

5

Industry to continue to promote the need for a new funding mechanism for tourism to enable needed investment across the tourism system, particularly for local government and industry-good activities, and to advance Actions set out in this Blueprint.

Industry principles for a future tourism funding mechanism:

- Be tripartite in nature, in line with international best practice. Central government, local government and industry should all have sustainable funding arrangements in place (currently only central government meets this criteria).
- Nationally applied for equity, efficiency, and sustainability across regions, while providing sufficient flexibility to allow for the unique characteristics and aspirations of different communities.
- Designed so all funds gained from tourism revenue streams are used solely for tourism purposes.
- Derived based on a robust understanding of where the costs and benefits of tourism lie.
- Be of sufficient magnitude to sustainably fund net costs where they are incurred, as well as allowing for system responsiveness and resilience. Enable industry self-sufficiency and self-determination, meaning any industry levy proceeds should be vested with industry and local government directly (with the appropriate accountability and transparency arrangements).
- Enduring, dedicated, and consistently applied to provide certainty and allow for long-term planning and execution.
- Accompanied by clear objectives, accountability arrangements and transparency regarding how funds are governed and allocated – particularly important when taxing visitors, many of whom do not vote in Aotearoa New Zealand and therefore cannot influence the creation or application of taxes.
- Prioritised for the industry's ongoing strategic journey, including supporting positive contributions across Te Taiao (environment), Hapori (community), Manuhiri (visitor) and Ōhanga (economic).

ACTION
04

Transform tourism and conservation

The belief

The wellbeing of Te Taiao and tourism is intertwined. New Zealand's natural environment is our most powerful visitor drawcard, and tourism is uniquely positioned to be a net positive contributor to conservation.

Context

New Zealand's natural environment is one of the primary reasons international visitors choose to visit. 'Landscapes and Scenery' was cited as the main reason for visiting by 47.6% of international visitors, ahead of 'Visiting Friends and Family' at 33.6%. 'Natural scenery and wilderness' were rated as good or very good by 99.1% of international visitors.

Around 2,000 tourism operators hold DOC concessions that enable them to operate on public conservation land and waters. These concessions support a wide range of activities, including overnight tramps, guided walks, boat cruises, scenic flights and ski fields. The concession system is therefore of critical importance to operators, with concession rights forming a vital part of many tourism business models.

More than 80% of New Zealanders — and over half of international visitors — visit protected natural areas managed by the Department of Conservation each year. Conservation tourism contributes around $5.4 billion annually and demand remains high. Conservation lands make up one third of New Zealand's land area on a budget approximately half the size of Christchurch City Council's. DOC estimates its current biodiversity budget of around $360 million is insufficient to halt ongoing biodiversity decline, with modelling indicating an additional $207 million per year is required simply to prevent further species and ecosystem losses.

In this context, tourism operators also have an active role to play as conservation partners, a role many are already playing and which the industry should formalise and make visible. Tourism operators play an important role in enabling safe and well managed access to conservation areas, helping DOC achieve its objective of connecting people with nature. 91% of respondents to TIA's TSC annual declaration cite that they are actively working to restore nature and many make significant contributions to conservation and biodiversity initiatives in the places where they operate.[8]

The connection of iwi as kaitiaki to conservation lands and waters is integral to how conservation places are managed, and these connections flow deeply into tourism and how it is undertaken. Increasingly, connections and partnerships with Māori will be material to how tourism operates on conservation lands and waters, including as operators, knowledge holders and conservation partners.

Progress

The Conservation Amendment Bill before Parliament in 2026 is the most significant legislative reform for the tourism-conservation interface in decades. It aims to modernise the current concession system, streamline DOC planning processes and create clearer investment pathways for tourism operators.

DOC's ability to charge international visitors for access to specific conservation sites creates a new funding stream, but the industry requires firm accountability that funds raised are reinvested in the visitor experience and conservation outcomes at those locations.

With modernisation of complex conservation legislation underway, the task for industry is to review, propose necessary changes and engage with its implementation to enable gains to be achieved over the long term.

8 TIA, Tourism Sustainability Commitment Annual Declaration, 2025.

1. Industry to actively engage on an ongoing basis with the implementation of the Conservation Amendment Bill when it is passed, working with DOC to ensure the new concession processes deliver the clarity, speed and investment certainty that operators need.

2. Operators to deepen their role as conservation partners by supporting biodiversity projects and building conservation contributions into their business plans and Tourism Sustainability Commitment action plans.

3. Industry to advocate to Government to establish transparent accountability for site-specific visitor charge revenue, with clear public reporting that funds raised are reinvested in the visitor experience and conservation outcomes at those locations.

4. Industry to advocate to Government (DOC) to develop a shared framework for measuring tourism's contribution to conservation, making visible the positive role the sector plays in protecting the places visitors come to experience and enjoy, and in ensuring visitors leave with an enduring connection to nature and our special places.

ACTION
05

Action on net zero carbon, climate resilience and adaptation

The belief

Climate change is an existential threat to the natural assets upon which Aotearoa New Zealand's visitor proposition relies and an operational risk for tourism businesses. The industry needs a coordinated plan to accelerate emissions reduction, strengthen resilience to climate related risks, and thereby strengthen our competitive position in key markets.

Context

Scientific evidence shows that global temperatures are tracking beyond the Paris Agreement aspiration of limiting warming to 1.5°C above pre-industrial levels. As a result, many climate related impacts are now unavoidable and will require adaptation as well as mitigation.[9]

Under this scenario, we can expect increased coastal erosion and inundation, frequent extreme rainfall and flooding, drought risk in some regions, impacts on alpine environments and glaciers, and changes affecting agriculture, infrastructure and tourism. These impacts are likely to increase insurance costs, the cost of capital and the difficulty of obtaining planning approvals. In some high-risk areas, insurance may become unavailable altogether.

In 2023, the Aotearoa Circle developed climate change scenarios for the tourism sector with these being orderly, disorderly and hothouse.[10] Under each scenario, there are impacts that need to be managed and mitigated. For instance, the lowest scenario that was based on 1.6°C increase by 2050 would see New Zealand sea level rise of 0.2 meters, 10 fewer snow days and 15 more extreme heat days.

The industry does not have a systematic plan for assessing these risks, prioritising responses or funding adaptation. This is an important gap for industry to address, including how it sits within the Government's National Adaptation Plan.[11] This will include incorporating the perspectives and interests of Māori operators and communities.

Alongside adaptation, reducing emissions remains a key priority. While international and national frameworks provide direction (United Nations' Paris Agreement and New Zealand's Second Emissions Reduction Plan 2026–2030), meaningful progress ultimately depends on action by individual tourism operators.[12]

TIA's Tourism Sustainability Commitment and the Akiaki platform provide primary tools for operator action. Further development of these tools and application by operators is needed to deepen their impact and to lift operator capability.

TIA's membership of the Glasgow Declaration on Climate Action in Tourism is intended to drive and demonstrate further action within the international framework.[13]

The most significant transport-related levers for tourism's long-term emissions profile include aviation and cruise. Progress on developing sustainable aviation fuel at scale is essential, alongside the development and adoption of lower-emission and alternative fuels for the cruise sector.

While aviation emissions are currently technology constrained, there is more we can do to reduce non-aviation emissions (37% of total tourism emissions in 2019). The Tourism 2050 target is to reduce these emissions by 30% below the 2019 level by 2030. With most of these non-aviation emissions being land-based transport, there is progress being achieved and more can be

9 Intergovernmental Panel on Climate Change (IPCC), Climate Change Synthesis Report, 2023
10 Aotearoa Circle, Tourism Sector Climate Change Scenarios, 2023
11 MCERT, National Adaptation Plan, 2023
12 MCERT, New Zealand's Second Emission Reduction Plan, 2026
13 UN Tourism, The Glasgow Declaration on Climate Action in Tourism, 2023

done. For instance, of the 40,000 Rental Vehicle Association's member fleet, 23.5% are hybrid vehicles, and 1.5% are electric.[14] Accelerating this progress can yield significant emission reduction gains for the industry.

Climate transition has many aspects including operational efficiency, integration of low carbon technologies, innovation and emission reductions, each of which fundamentally strengthens the industry and its competitive position.

1

Industry to develop a tourism sector climate change resilience plan and decarbonisation roadmap that builds on the Aotearoa Circle work to define adaptation pathways and sector emissions reductions and investment requirements.

2

Industry to advocate to Government to specifically include tourism within its National Adaptation Plan, with clear roles for central and local government to advance.

3

Operators to measure their carbon emissions, set credible reduction targets and engage with the Tourism Sustainability Commitment as the primary tool for tracking and publicly reporting progress, and engage with Akiaki to increase capability to act to reduce emissions.

4

Industry to advance the Glasgow Declaration on Climate Action in Tourism, using the five pathways of Measure, Decarbonise, Regenerate, Collaborate and finance to guide climate action and provide international accountability.

5

Industry to advocate to Government to develop and advance sustainable transport fuel pathways for tourism, including a sustainable aviation fuel mandate with a supporting programme, and support for lower-emission and alternative marine fuels for cruise.

6

Industry to advocate to Government to develop its tourism emissions measurement system to include sector-level tourism reporting.

[14] Rental Vehicle Association, 2026

ACTION

06

Build sustainability capability

The belief

The long-term success of tourism in Aotearoa New Zealand will increasingly depend on our ability to demonstrate measurable positive outcomes for nature, culture and communities. Tourism aspires to not only reduce impacts, but to actively contribute to environmental restoration, cultural vitality and community wellbeing. The challenge is to make sustainability a mainstream business capability across the industry and in so doing ensuring we are a sustainable and globally competitive industry.

Context

While climate action is a critical part of sustainability, building sustainability capability extends more broadly to how tourism businesses contribute to economic, visitor, community and environmental outcomes. Achieving a sustainable tourism industry requires action from tourism businesses across the sector which involves reducing impacts while enhancing the natural, cultural and community assets that enable the tourism industry.

TIA established the Sustainability Commitment in 2017 as a strategic intervention to support tourism businesses to operate sustainably using an economic, community, visitor and environment framework. It has the vision to lead the world in sustainable tourism.

TIA member uptake has been strong and the TSC Annual Declaration provides a set of indicators on the actions undertaken. The TSC sets out 12 commitments for operators to advance as they progress on their sustainability journey.

Tourism is uniquely placed to make a major contribution to our national efforts to restore our environment. Nature is a central part of our product as a destination and many tourism businesses operate in these natural places.

The step to protect and restore Te Taiao has been taken on by many businesses and now we are advancing this right across the industry.

Predators kill an estimated 25 million native birds each year and some 4,000 species native to New Zealand are threatened or at risk.[15] Reversing this decline will require sustained and coordinated effort, including from the tourism industry which operates in and showcases many of New Zealand's natural environments and biodiversity.

Under this Action, the tourism industry and the many businesses within it will contribute to initiatives to support New Zealand's national goal of becoming Predator Free by 2050. These efforts also provide an opportunity to engage visitors in conservation and build their understanding and support.

Sustainability is a journey. Continued action will help shift the sector towards nature positive or regenerative tourism. There is also growing recognition of the connection between improved sustainability performance and long-term business success.

Progress

TIA's Akiaki online learning platform is the primary tool for building sustainability capability across the industry. It currently offers eleven modules with strong uptake, but lacks NZQA accreditation, which limits its currency with employers, employees and training systems. Gaining accreditation for Akiaki modules as micro-credentials would give operators and their people recognised qualifications for sustainability learning and create a pathway toward broader industry-wide credentialling.

The Tourism Sustainability Commitment provides the accountability framework within which Akiaki sits, and growing participation in the TSC remains a core industry priority.

[15] Department of Conservation, Towards a Predator Free New Zealand, Predator Free Strategy.

1

Industry to grow Akiaki into the primary capability platform for the sector, expanding module coverage, engagement and practical implementation support to improve overall sustainability capability.

2

Operators to engage with the TSC by developing and implementing their own action plans and completing the annual TSC Declaration that provides the baseline for sustainability accountability and reporting annually on progress.

3

Industry to adopt Predator Free 2050 as a tourism mission and support operator participation through conservation related activities and partnerships.

4

Industry to work with accreditation agencies, including Qualmark, to ensure sustainability performance is recognised within quality assurance frameworks.

ACTION
07

Power-up data, technology and AI

The belief

In a world where AI is reshaping every aspect of how tourism operates, from how visitors discover destinations to how operators run their businesses, New Zealand's tourism industry must have the data architecture, digital infrastructure and AI capability to compete and to make informed decisions.

Context

New Zealand's tourism data programme is operated by MBIE and covers the key variables the industry depends on, including visitor volumes and spend, satisfaction, community sentiment and economic contribution. It is the foundation for evidence-based decision making across the tourism system. However, parts of the programme rely on time-limited IVL funding rather than secure baseline appropriations, which puts longitudinal data series at risk and creates uncertainty for long-term planning. Securing this funding is an immediate priority.

The programme also has known gaps. Coverage, sustainability indicators, regional disaggregation, timeliness and the depth of analysis and interpretation available to industry all have room to improve. Within this system, there are specific interests of Māori, including data sovereignty, Māori visibility in the digital ecosystem and participation in the design of the data architecture.

At the same time, the nature of tourism data is changing fundamentally. AI and related technologies are creating access to near real-time information on visitor behaviour, bookings, itineraries, inventory and customer feedback. This shift has the potential to transform both how tourism businesses operate and how the tourism system is understood and managed.

For operators, AI can automate routine tasks and free up capacity for higher-value visitor interactions. At the system level, it offers a depth and timeliness of insight that traditional survey-based data cannot provide.

AI will fundamentally change the visitor experience, including destination discovery, booking behaviours, itinerary planning, personalisation of experiences, storytelling, service delivery and more. How we embrace this change while preserving the authenticity and human connection that makes our visitor experience exceptional and uniquely kiwi will be key.

At the same time, AI provides a huge opportunity for operators to gain efficiency, productivity and improve performance. This highlights the multiple dimensions that AI will touch on across both the demand and supply sides of the tourism industry.

New Zealand's AI Strategy,[16] released in July 2025, identifies AI as central to national productivity and growth, with themes of accelerating adoption, reducing barriers to investment, building capability and trust and aligning internationally. Each of these applies directly to tourism.

Realising the potential of AI for data and insight requires infrastructure that does not yet exist. A new data architecture is needed, covering common classification standards, data sovereignty principles, privacy protections, governance arrangements and commercial frameworks for data sharing between public and private parties. Without this architecture, the shift to technology-enabled data will be fragmented and the benefits will accrue unevenly.

[16] MBIE, New Zealand's Strategy for Artificial Intelligence: Investing with Confidence, 2025

Progress

AI and technology adoption is already occurring across the tourism system, and the traditional data programme continues to provide its essential foundation. However, the industry has not yet established the standards, governance or capability needed to make the most of technology-enabled data. Building this foundation should be treated as a priority alongside securing the long-term funding of the existing programme.

1

Industry to engage with Government to continue improving core tourism datasets through secure long-term funding, stronger coverage, improved quality and more timely dissemination, to ensure these datasets provide trusted data on the key indicators that are of most importance to the ongoing functioning of the tourism system.

2

Industry to engage with Government to develop a tourism data architecture framework, establishing classification standards, data sovereignty rules, privacy settings and governance arrangements.

3

Industry to develop a tourism aI adoption programme specifically designed for small and medium operators, drawing on MBIE's Responsible AI Guidance for Businesses and providing practical tools, case studies and supported implementation pathways.

4

Industry to advocate for tourism businesses to have direct management of industry-relevant data, and investment in real-time and regional data capability for effective destination management decisions at regional and national levels. To be activated as new funding mechanisms are advanced.

5

Industry to engage with the Government's New Zealand's National AI Strategy and Science Investment Plan to ensure tourism is represented as a priority sector for AI adoption support and research investment.

6

Industry to engage with Government on ensuring there is quality data and insight into Māori tourism.

ACTION

08

Embrace Te Whakarae Māori

The belief

There is enormous opportunity for tourism and Māori in deepening the role of Māori within tourism as something that differentiates Aotearoa New Zealand in our international markets.

Context

New Zealand Māori Tourism established that Māori tourism businesses contributed $1.2 billion in 2023, up from $975 million in 2018, forming an important and growing part of our visitor experience.[17]

Demand for Ahurei Māori (cultural capital) experiences is evident. With 36.5% of international visitors directly experiencing Māori culture,[18] there is opportunity to build on this demand as a key contributor to the visitor experience, enriching both visitors and local communities.

Te Whakarae Māori reflects and celebrates the concepts of manaaki, tiaki and aroha (hospitality, care, and compassion and love).

'Ko au te whenua, te whenua ko au'

This whakataukī speaks to the inextricable relationship tangata (people) have to whenua (land) through shared whakapapa (genealogy).

Te Whakarae Māori aims to integrate kaupapa Māori (Māori approach) and Mātauranga (Māori knowledge systems) models into the tourism industry as a means of ensuring it is beneficial to all our communities: both people and whenua. For Māori, this means recognition of people, place and purpose of tourism, and its role in creating economic, cultural, social and environmental value.

Under this Action, industry will adopt and promote Te Whakarae Māori to elevate the role of Māori voices within the tourism industry and to advance Te Tiriti o Waitangi within tourism and in furthering the nation building narrative in Aotearoa New Zealand.

Te Whakarae Māori acknowledges the enriching potential of incorporating te ao Māori (Māori worldview), mātauranga Māori (Māori knowledge systems) and Pākihi Māori (Māori business) into the fabric of tourism within Aotearoa New Zealand.

Te Whakarae Māori lays a taki (challenge) to the industry that substantial progress and the building of capability are required to elevate the importance of Māori voices. This action cannot be done alone and needs to be reciprocal in nature.

Progress

In accepting this taki, a project is underway through TIA to give life to Te Whakarae Māori. The project is designed to foster connection between operators and local iwi, hapū and whānau. This project has been funded by a grant and will take place over two years to mid-2028.

A key objective of the project is to build the capability of operators who want to engage with local iwi, hapū and whānau, but don't know how. Outputs from the project will be knowledge, guidance and tools that will enable all operators to play their part in advancing this key aspect of the industry strategy.

Te Whakarae Māori is not a standalone initiative. Rather, it is an enabler across all aspects of this Blueprint and a centre-point for actions that strengthen the visitor experience, the tourism industry, Māori participation and wider societal outcomes.

[17] BERL, Value of Māori Tourism, Commissioned by New Zealand Maori Tourism, 2023

[18] MBIE, International Visitor Survey, YE March 2026

1

Industry and operators to support TIA's Te Whakarae Māori project, including engaging as a project participant and/or as a user of the project findings, tools and resources.

2

Operators to build relationships with local iwi, hapū and whānau at those places in which they operate and actively learn about and embrace Māori culture and te reo me ōna tikanga.

3

Industry and operators to appropriately carry the stories of the people and places in which they operate thereby celebrating our unique culture in Aotearoa New Zealand and enriching the experiences of our visitors.

4

Industry to support Māori tourism data collection, research, and other insights.

ACTION 09

Grow the tourism workforce

The belief

A skilled, motivated and resilient workforce is fundamental to the growth and quality of tourism. A system-wide response is needed to attract people into the industry, support rewarding careers, and ensure tourism businesses are employers of choice. Central to this is a productive highly-skilled and high-value workforce that enables a stronger industry and better visitor experiences.

Context

Tourism is a major employer in New Zealand, directly and indirectly supporting 327,888 jobs, representing 11.4% of total employment.[19]

TIA's Workforce Survey tracks tourism operators' experiences in operating and attracting their workforce. Consistently, 'Lack of Quality Applicants' is the top-ranked challenge (45% in August 2025,) as it has consistently been over recent years.

Workforce forecasts show that achieving the Government's goal of doubling tourism exports by 2034 will require approximately 100,000 additional workers. This equates to around 10,000 to 13,000 new entrants each year, before accounting for workforce turnover.[20]

The workforce challenge is structural. Tourism continues to face fragmented training systems, limited visibility within the education sector, persistent negative perceptions of tourism careers, regional and seasonal workforce barriers, mismatched employer and employee expectations and the absence of a national coordinating function for workforce development.

Tourism provides Māori opportunities for employment, enterprise, cultural capability and leadership. At the same time, Māori workforce participation offers wide benefits across the industry.

The education system is important, including secondary schools, polytechnics, private training organisations and universities. Each has an important role to play, requiring courses and curriculum that support both the vocational and professional roles in tourism.

Since 2023, the secondary and vocational education systems have undergone significant reform.

Tourism has been announced as an industry-led secondary school subject in the refreshed New Zealand Curriculum for Years 12 and 13. The curriculum for this subject will be developed by industry the Services Industry Skills Board and the Tourism Teachers Association, with the subject to be fully rolled-out in 2029.

The Services Industry Skills Board will also play an important role in on-the-job skill development that is important for building the diverse skills, expertise and experience needed across the tourism industry.

These developments are important in shaping the future pipeline of talent into the tourism industry, both vocational and professional.

With these factors to build the New Zealand workforce in place, immigration will continue to be a necessary complement to domestic workforce growth, not a substitute for it. The TIA Workforce Survey found that 33% of respondents were accredited through the Accredited Employer Work Visa and 33% were planning to hire Working Holiday Visa holders. Immigration New Zealand has generally been responsive to tourism workforce and skill needs in adjusting the settings where appropriate to do so.

19 Stats NZ, Tourism Satellite Account, Year ended March 2025
20 Ringa Hora Service Workforce Development Council, Tourism, Hospitality and Events Workforce, 2025

Progress

Significant progress has been made in understanding the tourism workforce challenge. The challenge now is implementation. Delivering the workforce needed to support future industry growth will require coordinated action across education, workforce planning, employer capability and immigration settings.

There are four priority areas for action:

1. Inspiring young people to consider tourism careers.
2. Forecasting future workforce needs and enabling seasonal flexibility.
3. Strengthening tourism education pathways to support the flow of talent into the industry.
4. Supporting operators to become employers of choice that attract, retain and develop their people.

Longer term, consideration is needed around a dedicated entity to oversee the tourism workforce requirements, perhaps as part of a national destination authority, with the ability to coordinate workforce planning, capability development and implementation of long-term workforce initiatives across the sector. A key function of this entity will be to provide leadership, action and accountability to tourism workforce development.

1

Industry to advocate to Government to investigate establishing a national functionality for tourism workforce development, potentially within a national destination authority, with a mandate to advance the long-term growth plan for the tourism workforce.

2

Industry to support the development and implementation of tourism as a subject for the New Zealand Curriculum, Years 12 and 13.

3

Industry to advocate to Government for a strong education system for tourism, from schools to private training organisations, polytechnics and institutes of technology and through to universities, to support the flow of well-educated talent into the industry.

4

Industry to continue to grow Akiaki as a business capability platform for operators and their staff, including workforce modules.

5

All operators to implement the TSC Employer of Choice commitment and complete the TSC's annual declaration.

6

Industry to advocate to Government to operate an enabling immigration system to support tourism workforce shortages, recognising the short- and long-term tourism workforce needs.

7

Industry to advocate to Government for an ongoing process to forecast future workforce needs so we can plan for and train the future tourism workforce.

ACTION 10

Embed Tiaki

The belief

Tiaki, Care for New Zealand, is the most powerful expression of what we stand for as a destination. Rooted in Māori values, Tiaki has enormous scope for changing the way we care for our place, people and manuhiri - extending well beyond its original intent as a guide for visitor behaviour.

Context

Tiaki, Care for New Zealand was created in 2018 by a group of government and industry parties through a collective desire to share New Zealanders' connection to the land with visitors and travellers, helping them travel safely and conscientiously. It guides international and domestic travellers in their attitudes toward people and place, showing them how to contribute to preserving and protecting what makes our home so special, so it can continue to be enjoyed long into the future.

This is not a marketing campaign to increase demand, rather it is an initiative to educate and support positive behaviour to protect our country for generations to come. Tiaki has been set up to be used widely across the sector, enabling operators and RTOs to promote it and incorporate it into their communications with visitors.

Grounded in te ao Māori, Tiaki centres on caring for the environment, people and place, ensuring tourism delivers positive outcomes for communities and future generations. The guiding vision, Toitū te taiao, toitū te tangata, toitū Aotearoa, reinforces this ambition through a clear behavioural framework. Visitors are encouraged to respect tikanga and culture, keep themselves and others safe, protect and restore nature, and contribute meaningfully to communities.

At the same time, there is a strong strategic opportunity. Global travel trends increasingly favour sustainable and values-led tourism experiences. Tiaki provides a distinctive platform by aligning visitor behaviour with a uniquely New Zealand perspective grounded in connection to nature and culture.

Progress

The impact of Tiaki comes from awareness of it and ultimately how it changes behaviours of visitors and the industry itself.

There is a major job to expose all new visitors to Tiaki and what it stands for. Currently, awareness by outgoing international visitors is around 10%[21] but is higher with domestic (31%) visitors and campers in Queenstown (48%).[22] In addition, around 80% of tourism businesses actively share Tiaki with their visitors.[23]

These results highlight the need to ensure the reach of Tiaki to our visitors and that ongoing and elevated effort is required to lift recognition and deepen its impact. To support the ongoing work from the industry, the Government recently committed $500k from the IVL to expand the Tiaki programme and support responsible visitor travel.

21 MBIE, International Visitor Survey, March 2026.
22 Air New Zealand, Monitor Survey, May 2026
23 TIA, TSC Annual Return, 2025

1

Industry to promote Tiaki universally across visitors, operators and communities as the expression of kaitiakitanga that defines how New Zealand does tourism.

2

Industry and operators to leverage Tiaki to create positive change by delivering measurable improvements in visitor behaviour and reducing negative impacts on communities and the environment.

3

Industry to investigate further development and broadening of Tiaki to increase its recognition and use by industry and visitors.

4

Industry to investigate behaviour change from Tiaki, by both visitors and operators.

Making it happen | Whakamana tūāpapa

Tourism 2050 is an industry strategy and its implementation depends on the combined efforts of industry, government and individual operators working from a shared understanding of what needs to be done and why.

TIA will use this strategy to guide its advocacy, engage with Ministers and officials on the government-facing actions, support implementation across the industry, and report publicly on progress.

The TIA Tourism Council will provide governance oversight and accountability for delivery of the ten actions.

Individual operators also have a critical role to play. Advancing the Tourism Sustainability Commitment, Tiaki, Te Whakarae Māori, Predator Free 2050, AI adoption and workforce development are not actions that TIA can deliver on behalf of the industry. Success depends on individual businesses taking action within their own operations. The cumulative effect of many businesses making progress is what will move the industry forward.

Government has a critical enabling role and New Zealand's Tourism Policy Statement is the foundation for this to occur. Several of the most significant actions in this strategy, including tourism system funding reform, strengthening tourism's role within local government, establishing national destination management arrangements and modernising conservation legislation, can only be advanced through government decisions. TIA will continue to advocate clearly, constructively and persistently for progress in these areas.

Progress will be measured and reported publicly. This refresh establishes the 2030 milestones against which progress will be assessed. We will update these indicators and revise the strategy again as the operating environment changes and as we make progress toward the 2050 vision.

Ngā mihi nui ki a koutou katoa.

Outcomes and targets | Whakataunga

Our vision to 'enrich Aotearoa New Zealand through a flourishing tourism ecosystem' is to ensure that a prosperous, sustainable and distinctively New Zealand tourism industry contributes to the wellbeing of our country, its people and the natural world.

Progress towards this vision is assessed across four outcomes and targets are derived from the 10 action areas outlined earlier.

Outcome 1: Hapori (Community)

Enhance the vibrancy, culture, health, and quality of life of local communities.

Area	Data source	Base	Rationale	Target
New Zealanders' perception of tourism	TNZ, TIA, DOC, New Zealanders' Views of Tourism	89% (YE May 2023)	A key indicator of the health of tourism is the views of the host communities towards it	90% of New Zealanders' think tourism is good for New Zealand and will be sustained over the period to 2030
Seasonality	Stats NZ, International Visitor Arrivals	Proportion of off-peak arrivals to peak season arrivals is 1 to 1.64 (2019)	The ratio between peak and off-peak international arrivals indicates if travel activity is getting more or less concentrated across the year. Balanced arrivals across the year supports industry productivity	Proportion of off-peak arrivals to peak season arrivals is 1 to 1.6 or less by 2030

Outcome 2: Manuhiri (Visitor)

Provide timeless experiences that differentiate Aotearoa New Zealand in the minds of manuhiri (local and international).

Area	Data source	Base	Rationale	Target
Domestic visitor satisfaction	TIA, Domestic Visitor Satisfaction	86% (YE May 2023)	To maintain and improve the performance of tourism in meeting the needs of domestic visitors	Domestic visitor satisfaction is sustained at 90% over the period to 2030
International visitor satisfaction	MBIE, International Visitor Survey	90% (Quarter 1, 2023)	To maintain and improve the performance of tourism in meeting the needs of international visitors	International visitor satisfaction is sustained at 90% over the period to 2030
Participation in Māori cultural experiences	MBIE, International Visitor Survey	46.9% (YE March 2020)	To substantially increase the numbers of international visitors participating in Māori cultural experiences. The intention is to build stronger indicators and targets for Māori tourism supply and demand over time	70% of international visitors participated in a Māori cultural experience by 2030
Tiaki awareness	MBIE, International Visitor Survey	14% (Quarter 1, 2023)	To establish an indicator for understanding how international visitors can be great visitors within Aotearoa New Zealand through their awareness of Tiaki	30% of international visitors are aware of, and supported by, the Tiaki Promise by 2030.

Outcome 3: Ōhanga (Economic)

Support productive and prosperous tourism businesses and the Aotearoa New Zealand economy. The industry is striving for value growth. By increasing the average spend per visitor, coupled with the visitor mix, increased length of stay and modest volume growth, TIA expects tourism's total expenditure will reach $55 billion per annum by 2030 (inflation adjusted).

Area	Data source	Base	Rationale	Target
Contribution to GDP, Exports and Employment	StatsNZ: Tourism Satellite Account	9.1% of GDP 19.9% of Exports 13.2% of employment (YE Mar 2020)	To ensure that tourism is sustaining its contribution to the wider economy	Tourism contribution to GDP, Exports and Employment is sustained over the period to 2030
Visitor mix	StatsNZ: Tourism Satellite Account	42.7% International 57.3% Domestic (YE Mar 2020)	To signal the importance of maintaining a balance between international and domestic tourism	Proportion of international and domestic visitor spend is between 55-60% domestic and between 40-45% international in 2030

Outcome 4: Te Taiao (Environment)

Invest in the protection, restoration and enhancement of Te Taiao (our natural world).

Area	Data source	Base	Rationale	Target
Aviation carbon emissions	StatsNZ, Greenhouse Gas Emissions	3,587 kilotonnes of carbon dioxide equivalent in (2019)	Aviation carbon emissions make up 63% of tourism's total emissions making it a key area to focus on over the longer term, even though it is a hard to abate sector.	Aviation sector to be Net Carbon Zero by 2050
Non-Aviation carbon emissions	StatsNZ, Greenhouse Gas Emissions	2,244 kilotonnes of carbon dioxide equivalent in (2019)	The industry has more control over the non-aviation emissions that make up 37% of tourism emissions. Mostly land transport and other sectors like accommodation	Non-aviation tourism to reduce carbon emissions by 30% below the 2019 level by 2030
Carbon reduction	TIA, TSC Annual Survey	41.3% of TIA members act to reduce their carbon emissions	Reducing tourism industry carbon emissions requires action from all tourism businesses	95% of TIA members are measuring, managing and reducing their carbon emissions by 2030
Waste reduction	TIA, TSC Annual Survey	87.8% of TIA members act to reduce their waste	Reducing tourism industry waste requires action from all tourism businesses	95% of TIA members are managing their waste to minimise negative impacts by 2030
Predator free and biodiversity	TIA, TSC Annual Survey	68.6% of TIA members act to restore nature	Having every tourism business contributing will add impetus towards protecting and restoring our biodiversity	95% of TIA Members are actively supporting and championing predator free and/or biodiversity initiatives by 2030

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