

Tourism in New Zealand

A briefing for councils across Aotearoa

FEBRUARY 2026



Who we are

Tourism Industry Aotearoa (TIA) is the peak industry body for tourism in New Zealand, with over 1200 businesses who represent the breadth of our diverse and dynamic sector. TIA's membership spans accommodation providers, attractions, transport and hospitality, and includes businesses of all sizes – from publicly listed corporates, to the hundreds of smaller operators who enable tourism to happen in every corner

of our country and support our local economies. TIA advocates for policies that enable balanced growth – where tourism benefits the economy, communities and environment alike. Through TIA's Tourism Sustainability Commitment, tourism businesses are committed to a sustainable, thriving visitor economy that supports local communities and conservation outcomes.

Tourism is a system

Tourism is a diverse, interconnected system that touches almost every part of New Zealand's economy. It fosters global and local connection, celebrates our whenua and cultural richness and creates opportunities for people and place. Annual tourism expenditure reached \$44.4 billion in 2024, making it New Zealand's second-largest export earner. Tourism directly and indirectly supports over 300,000 jobs, or about one in ten across the country. Every \$1 million in tourism spend in a region supports between four and eight local jobs.

Tourism depends on strong partnerships between industry, central government and local councils. Councils invest in infrastructure and amenities that make places great to live and great to visit, from walking trails and parks to signage, events and amenities. Regional Tourism Organisations (RTOs), often council-funded, play a key role in marketing, events and destination management. Their efforts ensure the visitor economy aligns with community aspirations, local business needs, and national strategies.

NEW ZEALAND'S TOURISM INDUSTRY* | YE MARCH 2024

Total expenditure

\$44.4b

Domestic expenditure

\$27.5b

International expenditure

\$16.9b

Direct GDP contribution

\$17.0b

% of GDP

4.4%

% of exports

17.2%

Tourism exports

\$16.9b

Jobs supported (direct & indirect)

303,420

% of NZ total jobs (direct & indirect)

10.7%

GST generated

\$4.1b

% of tourism businesses currently recruiting jobs**

47%

% of NZers that think tourism is good for NZ***

93%

*Stats NZ Tourism Satellite Account, year ending March 2024.

**TIA Workforce Survey, August 2025.

***TIA and Tourism New Zealand 'Views on Tourism' survey, year ending June 2025.

Tourism is local

Tourism supports local employment, business diversity and investment. Across the country, 62% of all tourism spend comes from New Zealanders themselves. This domestic foundation provides resilience for regional economies and ensures that infrastructure and services, funded for visitors, also benefit residents.

Most tourism businesses are small and locally owned, employing local residents and paying local rates. In larger cities, commercial ratepayers such as hotels contribute significantly to council revenue. Across all

regions, tourism operators partner with RTOs to promote destinations, sponsor community events, and support local projects.

Through the Tourism Sustainability Commitment (TSC), more than 2,000 tourism businesses have pledged to reduce emissions, support conservation and give back to their communities. Data from the TSC annual declaration shows that a majority of operators are actively involved in environmental protection and community partnerships.

Who are our visitors?

The majority of tourism activity is driven domestically, with New Zealanders accounting for nearly two-thirds of all tourism expenditure.

Looking at our international visitors, Australia is the largest market, followed by the United States, China and the United Kingdom. New and emerging markets in Southeast Asia and India are also growing steadily. Each international visitor spends around \$5000 in New Zealand on average.

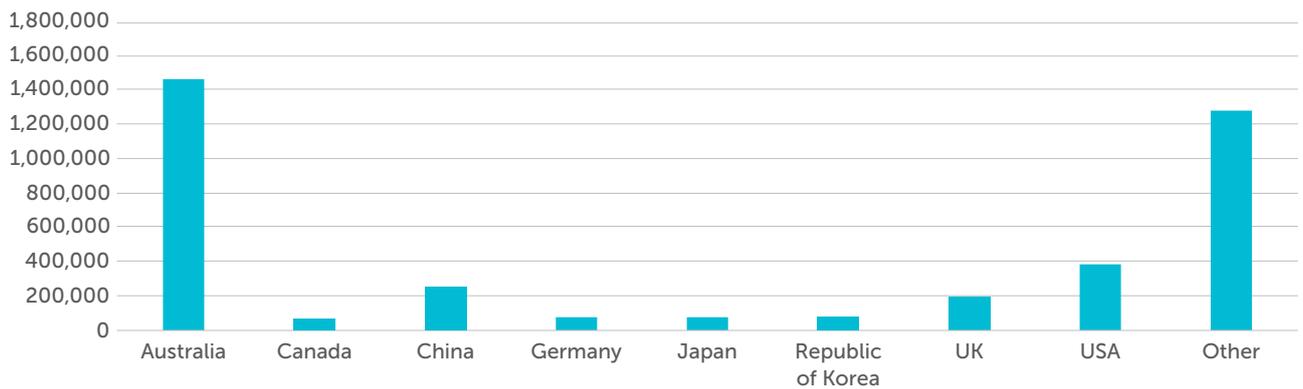
International tourism generated \$16.9 billion in export earnings in the year ended March 2024. Visitors spend on accommodation, food, experiences, and transport – driving local economic activity across multiple sectors, from logistics and retail to creative industries and construction.

What do New Zealanders think about tourism?

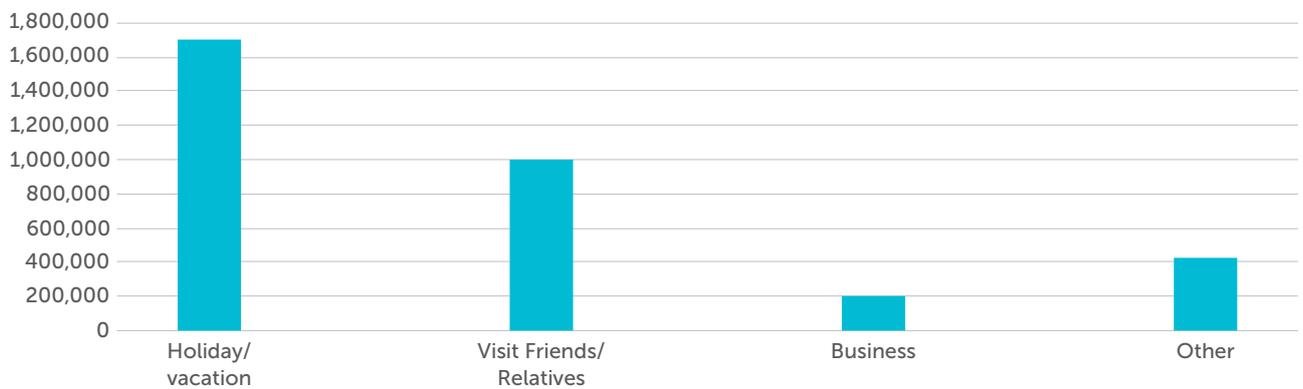
Public support for tourism remains strong: 93% of New Zealanders say tourism is good for the country. They see key benefits in job creation, keeping local businesses open, inspiring domestic travel and fostering cultural exchange. However, they also want to see the industry managed responsibly – with focus on sustainability, infrastructure and community wellbeing.

Public sentiment does however vary across regions depending on local pressures such as housing, congestion or freedom camping. Maintaining tourism's social licence requires ongoing collaboration between councils, communities and the tourism sector.

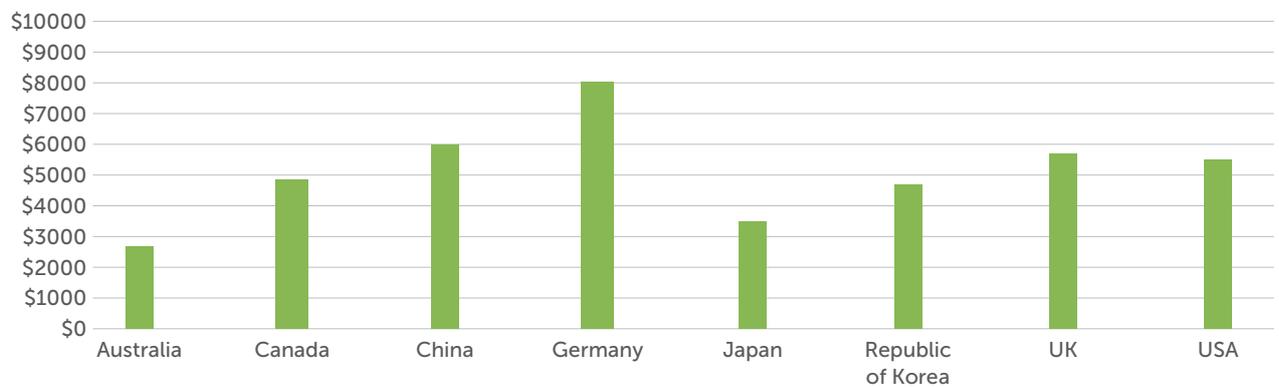
Annual international visitor arrivals by market*



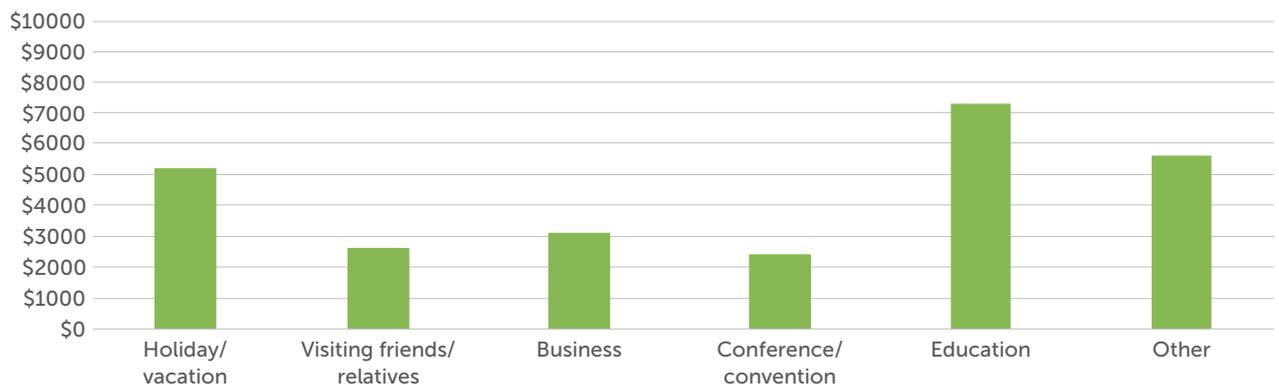
Annual international visitor arrivals by purpose*



Average spend per visitor by market**



Average spend per visitor by purpose**



*Stats NZ International Visitor Arrivals, rolling annual total to August 2025.

**MBIE International Visitor Survey, rolling annual average to June 2025.

What's the plan?

Upholding both the visitor experience and community feelings about tourism requires an approach we call 'balanced growth'. This concept is at the heart of the industry's Tourism 2050 strategy – a Blueprint for Impact which has ten priority actions to ensure all aspects of tourism, including demand characteristics, infrastructure, attractions, accommodation and services, develop in a way that complement each other and benefit our destinations and their communities. Councils also have a vital role to play in enabling and improving the tourism ecosystem. The ten actions in 2050 are:

1. Design Tourism Industry Settings for 2050
2. Address Industry Funding
3. Power-up Data and Research
4. Embrace Te Whakarae Māori
5. Achieve Net Zero Carbon
6. Champion Predator Free and Biodiversity
7. Transform Tourism and Conservation

8. Build Sustainability Capability
9. Grow the Tourism Workforce
10. Embed the Tiaki Promise.

Complementing the industry's plan, the Government is developing the Tourism Growth Roadmap which seeks to:

- Increase international arrivals to pre-pandemic levels (3.89 million) by 2026
- Double tourism export value from \$9.9 billion in 2023 to \$19.8 billion by 2034
- Grow the number of Kiwis employed in tourism and hospitality.

The Roadmap's seven workstreams – workforce, infrastructure, regions and communities, visitor experience, system coordination and data, system funding, and connectivity – have clear intersections with local government activity.

Councils, Regional Tourism Organisations and their role

Great places to live are great places to visit and local councils invest in infrastructure, amenities and services that both residents and visitors enjoy.

Regional Tourism Organisations (RTOs) are funded by councils and are responsible for domestic and international marketing, events, destination management and visitor engagement. RTOs come in all shapes and sizes and can cover a single or multiple council jurisdiction. Their structures can also range across Council Controlled Organisations, units within councils, and incorporated societies and trusts. Collectively, councils make up 90% of RTO funding nationwide, however this investment in tourism activity and the work of RTOs varies widely between destinations.

RTOs work in partnership with their local tourism businesses and provide capability support. Programmes can include marketing clusters, improving sustainability practices, cultural competency, digital capability, working with international travel trade, enhancing product offerings, pricing and quality assurance. RTOs also provide guidance on product/experience development and advocating for investment to advance the sector and enhance the destination. Carrying out regional, district and local event promotion is a core function to stimulate domestic visitation.

RTOs have developed Destination Management Plans (DMPs) which are a shared vision for how tourism should operate in a region. The plans align local tourism strategies and activity with the achievement of council and community goals, sustainability initiatives, and contributing to infrastructure planning and development. They include:

- Analysis of visitor and community needs
- Identification of priority markets and experiences
- Strategies for sustainable growth and environmental protection
- Plans for infrastructure, amenities, and access
- Community and stakeholder engagement
- Governance, funding, and implementation actions
- Monitoring and evaluation of progress.

Well-grounded plans are key to shaping the nature and quality of regional tourism. TIA is a strong supporter of DMPs and favours ongoing funding for their implementation.

Some tourism issues relevant for councils

There are a number of areas of collaboration for councils with the government and industry which include funding for mixed-use infrastructure and destination management, sustainable use of the International Visitor Levy, short-term rental regulation, responsible camping, modernised conservation partnerships, sustainability acceleration through the TSC and workforce support through housing and transport planning.

Funding for mixed-use infrastructure and destination management

There is a lack of sustainable funding in the tourism system which means there has been persistent under investment especially for destination management plan implementation. Central Government receives significant revenue from GST and taxes, but Local Government typically only has its rating base to fund its costs. There is often a disconnect between where visitors go and where New Zealanders pay rates, which means some regions have high costs to support tourism activity.

TIA and the industry are seeking a sustainable funding mechanism along with funds from the International Visitor Levy to be able to follow through on plans for infrastructure, destination management, network design, quality improvement, capability building and others. We have been and will continue to actively work with LGNZ and the government on this issue.

Accommodation and short-term rentals

There is strong industry support for a centralised registration and data-sharing system that would collect information from all short-term rental accommodation providers. A refined regulatory framework would enable consistent application at a territorial level for planning and compliance, record activity levels, and include a mandatory code of conduct to address amenity issues and guest/operator behaviour, ensuring a safe and positive guest experience.

Freedom camping

TIA supports a strong responsible camping framework that allows for the effective management of this part of the tourism system.

TIA supports the legislative framework that allows for the effective management of this part of the tourism

system established by the Freedom Camping Act 2011 that defines and regulates freedom camping and the roles of local government; and the Self-contained Motor Vehicles Legislation Act 2023. The 2023 Act means that freedom camping can only take place on non-camping designated local authority land if the vehicle has been certified as self-contained. Some regions may have implemented bylaws which designate where freedom camping can take place.

Vehicles that are not self-contained are allowed, but they can only stay at commercial holiday parks or at other designated camping facilities and DOC camping grounds that have services. The Self-containment requirement came into force for rental camper vehicles in December 2024 and June 2026 for privately owned camper vehicles.

The industry response in getting their vehicles certified under the 2023 Act has been a major exercise, with over 25,000 rental camping vehicles certified as self-contained as of January 2026, and with a similar number of private vehicles certified.

TIA advocates for appropriate investment by central and local government to ensure that implementation is monitored and that the system operates as intended over the long term, including for insight, information, infrastructure, regulation and enforcement. This should include maintenance of infrastructure and sufficient environmental protection, including for rubbish and recycling that matches user pressures.

TIA does not support total bans on freedom camping as this would impact on New Zealanders who regard it as a birth right and unfairly penalise the vast majority of overseas visitors who behave appropriately when camping. Instead, TIA encourages campers to consider all options that are legally available to them. New Zealand is very well served across these available options, including having an extensive holiday park network and DOC facilities for campers to enjoy.

TIA convenes the Responsible Camping Forum that includes representatives from local government, tourism operators, industry associations, camping associations and central government agencies. Together, the Forum considers issues and solutions to enable well-functioning responsible camping.

Tourism and conservation

Tourism and conservation are intertwined in New Zealand. Our industry strategy called for modernising the conservation settings and the Government has recently consulted on proposals to modernise how businesses work on public conservation land including how to make it easier for them to work with the Department of Conservation. Transforming this relationship means tourism generated revenue supports conservation goals and enables high-quality visitor experiences. In this way, tourism can be a greater active driver of environmental stewardship and improve key facilities at conservation attractions such as visitor centres, car parking and access. Half of the funds generated by the International Visitor Levy go towards conservation efforts.

Tourism Sustainability Commitment

75% of travellers want more sustainable travel options and tourism must accelerate emission reductions across aviation, accommodation, transport and attractions while managing their operations for climate adaptation. Through TIA's Tourism Sustainability Commitment, 2,000 operators have signed up to measure and reduce emissions, give back to their communities and improve their visitors' experience. Tourism businesses are focused on reducing and eliminating carbon emissions. Targets for non-aviation emissions are to be 30% below 2019 levels by 2030.

Tourism's 'Tiaki Promise'

To help educate visitors about being prepared and caring for New Zealand the industry developed 'TIAKI – Care for New Zealand'. Tiaki is a set of guiding principles for both visitors to follow to keep everyone safe, protect our environment, respect our culture and build a sense of connectedness. Tiaki supports community outcomes because it sets an expectation for visitors and operators alike to experience our country with manaakitanga. In acting in line with Tiaki, visitors and our industry are more likely to act to care for and protect our environment and to engage with and enrich the communities they visit and interact with.

Workforce development and employment

People are at the heart of the visitor experience and tourism employers are committed to developing their staff. Each year around 50% of tourism businesses are recruiting for staff and that is across a full spectrum from entry level to skilled strategic roles. Workforce supply challenges still persist however, especially where the roles are in remote locations and seasonal in nature. While the attraction and development of local talent is optimal for tourism employers, the industry also utilises overseas staff and working holiday visas to fill those roles. This workforce stays in the region to work, but by also traveling around the country they contribute to the economy in multiple ways.

Tourism supporting jobs, business, and communities

The way your council plans for and prioritises tourism directly influences the benefits your community receives. Tourism activity generates significant spend, supports local businesses and sustains employment. The following tables highlight tourism's economic footprint by region and territorial authority, including total tourism spend, direct tourism jobs and jobs per

million dollars of spend. These figures illustrate how tourism delivers real, measurable outcomes for every part of Aotearoa New Zealand.

DIRECT TOURISM SPEND AND JOBS BY REGION AND TERRITORIAL AUTHORITY*

Region	Tourism spend (\$m)	Jobs	Jobs per \$1m spend
Northland	\$1208	6751	5.6
Auckland	\$8276	52,747	6.4
Waikato	\$3455	18,545	5.4
Bay of Plenty	\$2160	12,922	6.0
Te Tairāwhiti Gisborne	\$158	1266	8.0
Hawke's Bay	\$818	5161	6.3
Taranaki	\$493	3642	7.4
Manawatū-Whanganui	\$1195	8061	6.7
Wellington	\$2384	14,777	6.2
Tasman	\$372	2145	5.8
Nelson	\$401	2864	7.1
Marlborough	\$460	2547	5.5
West Coast	\$532	2294	4.3
Canterbury	\$4184	26,428	6.3
Otago	\$4257	19,345	4.5
Southland	\$765	3233	4.2

Territorial Authority (TA)	Tourism spend (\$m)	Jobs	Jobs per \$1m spend
Far North District	\$546	2777	5.1
Whangārei District	\$522	3248	6.2
Kaipara District	\$140	725	5.2
Auckland	\$8276	52,747	6.4
Thames-Coromandel District	\$501	2318	4.6
Hauraki District	\$113	575	5.1
Waikato District	\$326	2182	6.7
Matamata-Piako District	\$184	966	5.3
Hamilton City	\$1057	7228	6.8
Waipā District	\$228	1448	6.3
Ōtorohanga District	\$40	263	6.6
South Waikato District	\$98	555	5.6
Waitomo District	\$120	280	2.3
Taupō District	\$789	2728	3.5
Western Bay of Plenty District	\$122	730	6.0
Tauranga City	\$1020	7471	7.3
Rotorua District	\$779	3326	4.3
Whakatāne District	\$165	1198	7.3
Kawerau District	\$10	31	3.2
Ōpōtiki District	\$64	167	2.6
Te Tairāwhiti Gisborne District	\$158	1266	8.0
Wairoa District	\$27	78	2.9
Hastings District	\$297	2081	7.0
Napier City	\$430	2528	5.9
Central Hawke's Bay District	\$64	475	7.4
New Plymouth District	\$392	3060	7.8
Stratford District	\$28	135	4.9
South Taranaki District	\$73	447	6.1
Ruapehu District	\$147	707	4.8
Whanganui District	\$183	1343	7.3
Rangitīkei District	\$72	395	5.5
Manawatū District	\$86	521	6.0
Palmerston North City	\$499	3881	7.8

Territorial Authority (TA)	Tourism spend (\$m)	Jobs	Jobs per \$1m spend
Tararua District	\$64	359	5.6
Horowhenua District	\$144	855	6.0
Kāpiti Coast District	\$200	1138	5.7
Porirua City	\$110	610	5.5
Upper Hutt City	\$76	336	4.4
Lower Hutt City	\$218	1219	5.6
Wellington City	\$1538	10,343	6.7
Masterton District	\$105	538	5.1
Carterton District	\$26	91	3.5
South Wairarapa District	\$110	503	4.6
Tasman District	\$372	2145	5.8
Nelson City	\$401	2864	7.1
Marlborough District	\$460	2547	5.5
Kaikōura District	\$169	568	3.4
Buller District	\$91	281	3.1
Grey District	\$117	517	4.4
Westland District	\$324	1496	4.6
Hurunui District	\$211	725	3.4
Waimakariri District	\$127	792	6.2
Christchurch City	\$2632	18,774	7.1
Selwyn District	\$156	1013	6.5
Ashburton District	\$270	1753	6.5
Timaru District	\$272	1321	4.9
Mackenzie District	\$324	1313	4.1
Waimāte District	\$23	169	7.4
Waitaki District	\$210	859	4.1
Central Otago District	\$286	1585	5.5
Queenstown-Lakes District	\$2826	11,576	4.1
Dunedin City	\$835	4868	5.8
Clutha District	\$101	457	4.5
Southland District	\$340	1051	3.1
Gore District	\$87	365	4.2
Invercargill City	\$338	1817	5.4

*Estimates modelled by Infometrics with sources including MBIE's Monthly Regional Tourism Estimates (MRTE), Tourism Electronic Card Transaction (TECT) data, and Stats NZ's Tourism Satellite Account (TSA). All data YE March 2024.



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