

Statement of Intent (SOI) 2024 – 2028



**100% PURE
NEW ZEALAND**

June 2024



Lake Tekapo/Takapō
Canterbury

Presented to the House of Representatives pursuant
to section 149 of the Crown Entities Act 2004



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Our Purpose:

Enrich Aotearoa New Zealand
and all who visit

Tō mātou Koronga:

*Kia rangatira a Aotearoa me
ngā manuhiri katoa*

Foreword from the Board and Chief Executive

Tourism New Zealand’s purpose is to enrich Aotearoa and all who visit. Through our work we are committed to ensuring that we support a sustainable and productive approach to tourism growth – where visitors leave a place better and tourism contributes positively to our home.

In this 2024 - 2028 statement of intent we move from supporting recovery to rebuild. We see significant opportunities for tourism to contribute to the government’s goal of doubling exports by value in ten years and supporting tourism businesses across the country succeed.

To do this, New Zealand must stand out from its many competitors. We must create demand for a New Zealand holiday through creating a distinct brand that showcases our warm welcome, our unique culture and our stunning landscapes.

Our unique insights and expertise will support wider cross-agency efforts to double the value of exports. This includes collaborating with New Zealand Inc to outline the role tourism can play as part of the country’s export strategy.

Tourism’s value as an export earner goes beyond the economic. Travel opens New Zealand up to the world, it connects us, allowing us to grow as a country. Tourism New Zealand can help open those doors by supporting the growth of aviation capacity through creating demand for travel.

Growth doesn’t have to come with negative impacts, strategic growth can result in sustainable and productive outcomes. Without our intervention the sector will likely revert to greater growth in our peak seasons which can add pressure to infrastructure, potentially harm tourism’s social licence to operate and create untenable off-peak troughs for businesses.

Over the next four years Tourism New Zealand will be focused on growing sustainable and productive off-peak visitation through three strategic intentions.

1. Build extraordinary desire for New Zealand as a year-round destination.
2. Convert desire for New Zealand into off-peak visitation.
3. Accelerate the New Zealand tourism sector becoming a world leader in sustainability.

Tourism and the visitor economy will deliver across the year for New Zealand, utilising existing infrastructure, growing airline capacity, creating secure vs seasonal employment and ensuring visitation is spread across our seasons to ensure our home is looked after. Regions are more impacted by peak visitation than gateway destinations (those with international airports), Tourism New Zealand’s focus on off-peak growth will also help address regional growth.

This is not about growing the off-peak at the expense of the peak summer season, rather it is about increasing consideration for the off-peak, converting that into off-peak arrivals, while still marketing New Zealand as a year-round destination.

We have the opportunity to reduce the tourism sector’s seasonality challenges and create positive impact that benefits New Zealand and our communities. This statement of intent sets out how we will deliver this.

He kupu takamua nā te Poari Matua me te Tumu Whakarae

Ko te whāinga a Manaakitanga Aotearoa, kia rangatira a Aotearoa me ngā manuhiri katoa. Mā roto i ā mātou mahi, ka ngākau titikaha mātou ki te taunaki i tētahi huarahi toitū, pūkaha hoki e whanake ai te ao tāpoi, inā hoki, kia whai oranga ai ngā manuhiri i tēnei wāhi, kia whai hua ai tō tātou kāinga i ngā mahi tāpoi. Hei ngā tau e whā e tū mai nei, ka aro a Manaakitanga Aotearoa ki ngā mahi

I te tauākī whāinga 2024 – 2028, e neke nei mātou i ngā mahi tauwhiro ki ngā mahi whakatikatika. E kite nei mātou i te hirahira o ngā āheinga i te ao tāpoi me ngā mauhiri e tautoko ana i te whāinga a te kāwanatanga ki te tārua i ngā hokonga atu ki tāwāhi i roto i te tekau tau, ā, me te tautoko hoki i ngā pakihī tāpoi huri noa i te motu.

E tutuki ai tēnei, me eke rā anō a Aotearoa ki tua o ngā taumata kei reira te nui o ngā kaiwhakataetae. Me hikina ake te hiahia ki tētahi rā hararei mā roto i te waihanga i tētahi papanga waitohu motuhake e whakaatu ana i te wairua mahana, i te ahurea me ō tātou whenua taurikura.

Mā ō tātou tirohanga ahurei, tohungatanga hoki e tautoko i ngā mahi kōtuinga a ngā tari kāwanatanga kia tāruatia ai ngā hua hokonga ki tāwāhi. Me mahi ngātahi me New Zealand Inc ki te whakarārangi mai i te whai wāhitanga o te ao tāpoi ki te rautaki hokohoko o te motu.

Ko te wāriu o te ao tāpoi hei rāngai hokohoko ka eke noa ki tua atu o ngā take ōhanga. E tuwhera ana ngā āheinga haereere a Aotearoa ki te ao hei tūhonohono, ā, ka whanake ake tātou o tēnei whenua. Mā Manaakitanga Aotearoa e āwhina ki te whakatuwhera i ngā tataui i āna mahi ki te whakapoapoa i te hunga hiahia haereere.

Kauaka noa e pākino te whanaketanga i ngā wā katoa, mā te whanaketanga rautaki e hua ai ngā putanga toitū, pūkaha hoki. Ki te kore mātou e wawao, kāore e kore ka kaha ake ngā wāhanga whaikaha, me te aha, ka tino pēhia kinotia ki ngā rauhanganga, ka raruraru ngā raihana pāpori, ā, ka hua ake ngā hārua totohe-kore mā ngā pakihī tē taea te karo.

I ngā tau e whā e heke mai nei, ka whai a Manaakitanga Aotearoa ki ngā take toro manuhiri kia toitū ai, kia pūkaha ai hoki mā roto i ēnei whāinga rautaki e toru:

1. He ehai whakaaro ake ki ngā wā totohe-kore ki Aotearoa.
2. Te takahuringa o ngā hiahia ki ngā wā totohe-kore.
3. He whakaterere ake i ngā kaupapa katoa e noho ai te ao tāpoi o Aotearoa hei toa toitūtanga i te ao whānui.

Ko tā te ao tāpoi me te ohanga manuhiri he whakaputa hua huri noa i Aotearoa nei mā te whakamahi i ngā rauhanganga o mohoa. Mā tēnei ka pakari ake ngā taunga rererangi, ka nui atu ngā tūranga mahi me te whai kia horapa kau te toro mai a ngā manuhiri puta noa i te tau hei tautiaki i tō tātou kāinga. Ka pā ngā take toro manuhiri nei ki ngā rohe, kua ko ngā wāhi ūnga nunui (ko ngā taunga rererangi nui ēnei), nā reira, me aro a Manaakitanga Aotearoa ki ngā whanaketanga totohe-kore kia whanake ake ngā rohe.

Ehara i te mea ko te whanaketanga wā totohe-kore i ngā totohe-kaha te tino aronga, engari ko te whai whakaaro noa ki ngā wā totohe-kore kia takahuria hei wāhanga totohe-nui, ā, he whakatairanga hoki i a Aotearoa hei wāhi ūnga puta noa i te tau.

He āheinga kei konei ki te whakaiti ake i ngā wero ā-kaupeka kia hua ake ngā pānga papai e puta ai he hua ki a Aotearoa me ngā hapori. Kei te tauākī whāinga e rārangi nei ngā mahi hei whakatutuki i tēnei.

Section One: The nature and scope of our work

Our Role

Tourism New Zealand is a Crown Entity, the organisation responsible for national destination marketing for New Zealand. Established under the New Zealand Tourism Board Act 1991, we also operate under the Public Finance Act 1989 and the Crown Entities Act 2004.

Our specific objectives set out under the New Zealand Tourism Board Act 1991 are:

- Market New Zealand as a destination to maximise long term benefit to New Zealand.
- Develop, implement, and promote strategies for tourism.
- Advise the Government and the New Zealand tourism industry on matters relating to the development, implementation, and promotion of those strategies

Over the next four years Tourism New Zealand's strategy, detailed in this Statement of Intent will focus on growing the value of international tourism, primarily delivered by growth in the off-peak months (March to November). This aligns with the Government goal of doubling exports by value in the next ten years and gives the tourism sector the most sustainable form of growth that will lift productivity across the sector benefitting communities throughout New Zealand.

Creating and converting demand for travel to New Zealand

As a marketing agency our primary focus is to market New Zealand as a desirable travel destination for international visitors. This is delivered through marketing activity

that includes paid marketing, earned media coverage and public relations, marketing through our own social media channels and newzealand.com website and trade marketing with the travel trade e.g. travel agencies, airlines. We also partner with aviation and trade partners to extend the reach and impact of our work as appropriate.

Those visitors who are influenced by Tourism New Zealand's work spend more, visit more regions, arrive more in the off-peak, and are more likely to recommend New Zealand as a holiday destination.

Supporting the tourism sector

While Tourism New Zealand does not lead tourism policy, destination management or product development it does support the sector to deliver a high-quality visitor experience. Our consumer understanding allows us to provide the sector with a range of insight that helps them meet visitor needs and expectations.

Tourism New Zealand partners with industry, regional tourism organisations, MBIE, Department of Conservation, New Zealand Māori Tourism and key industry associations to share consumer insights and work together to ensure that supply of tourism experiences and infrastructure is aligned to the demand.

Tourism New Zealand has two subsidiary organisations. Qualmark Limited is the industry quality assurance agency and Visitor Information Network (VIN Inc) trading as isite, provides quality information and bookings for experiences across a network of locations across New Zealand.

Our Purpose

Our purpose is to Enrich Aotearoa and all who visit

This reflects the dual need for tourism to contribute positive outcomes to New Zealand and to deliver a positive visitor experience for those who choose to visit, both

Tourism Sector

Tourism is a broad and complex sector with many different actors. Tourism New Zealand's role in marketing New Zealand requires working collaboratively across the sector.

Key components of the tourism sector include:

- **Tourism industry** – these range in size from large corporations through to self-employed individuals that deliver the experiences visitors have. It also includes the various sector organisations that represent different parts of the sector, New Zealand Māori Tourism and iwi.
- **Visitors** – first as consumers that may be considering New Zealand as a destination, and then as visitors, many of which have made a long-haul trip of a lifetime to New Zealand. They expect high-quality experiences.

are necessary. Without a visible positive contribution from tourism the sector's social licence to operate is diminished; and without providing quality experiences past visitors are less likely to advocate for New Zealand as a destination and our international reputation harmed.

- **New Zealanders** – expect a tourism sector that supports businesses and communities and does not negatively impact the environment, infrastructure and their ability to also enjoy tourist activities and places. New Zealander's can also share tourism experiences with international visitors as domestic visitors and as employees in the sector.
- **Government** – both central and local. Includes Minister for Tourism & Hospitality who is responsible for tourism in New Zealand and sets government priorities for the sector. We work closely with the Ministry of Business, Innovation and Employment who create tourism policy and provide advice to government. Regional tourism organisations (local government entities) who carry out destination marketing and management at a regional level.

Section Two: Operating environment and opportunities

Beyond recovery

Following the global COVID-19 pandemic, the international tourism sector has largely recovered, although different regions and operators are at different stages of recovery. There is still work to do; future growth is not guaranteed

and if it does occur without intervention, it is likely to occur mostly in the peak season. We have an opportunity to shape future growth for the benefit of the tourism industry and New Zealand.

Seasonality and the off-peak growth opportunity

To help deliver on the government’s goal of doubling exports by value in the next ten years, there is an opportunity to substantially grow off-peak visitor spend. This is a sustainable growth model as it is achievable with less pressure on social licence and infrastructure and helps sector productivity. Tourism is currently the second largest export sector in New Zealand and prior to the pandemic was the largest, the sector can play a significant role in realising export growth goals.

and off-peak as March to November.

Most tourism destinations have seasonal highs and lows. The United Nations World Tourism Organisation and others identify seasonality as arguably the biggest challenge in tourism. There is significant opportunity in extending the peak season but there is also a recognition that this can be difficult to shift. New Zealand is no exception. New Zealand is more seasonal than other peers because of the shorter warmer period than some countries (e.g. Australia), because northern hemisphere summer holidays tend to remain in the northern hemisphere, and December and January are a significant holiday period for New Zealand’s domestic tourism.

Seasonality in tourism refers to the pattern of fluctuating tourist activity and demand for travel destinations based on the time of year. For New Zealand, we define peak as the summer months of December, January, and February

Seasonal shape of tourism in New Zealand



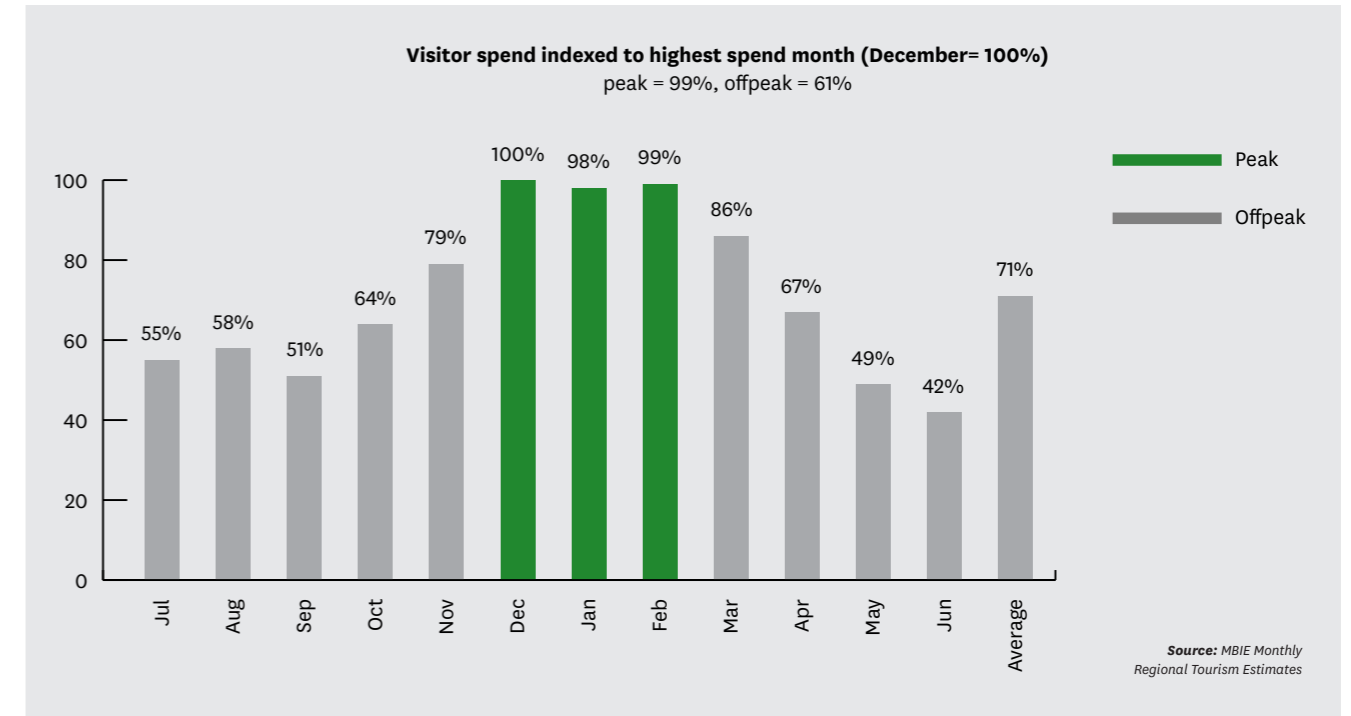
In the New Zealand tourism sector, the peaks and troughs in visitation result in many tourism operators and communities doing well three months of the year during summer and less so for the other nine. It can mean:

- Seasonal jobs that aren’t secure
- Congestion and the perception of overcrowding in summer in some locations

- Excess capacity for hotels, experiences and vehicle hire in the off-peak
- Airline connectivity reduces outside peak season.

Overall, seasonality results in sector productivity decreasing outside of summer vs. other sectors which operate more evenly across the year. We consistently hear from industry that reduced visitor numbers over off-peak is one of their key challenges.

Seasonal shape of visitor spend



There is an opportunity to lead sustained change that mitigates the tourism sector’s seasonality challenges. If properly addressed, this could:

- Support the industry to operate effectively across the year.
- Create more year-round jobs that are more attractive to employees.
- Provide more sustainable growth by better utilising excess capacity of tourism assets and infrastructure.
- Benefit smaller regions who tend to be more exposed to seasonal peaks and troughs.
- Enable industry to invest more in their products and

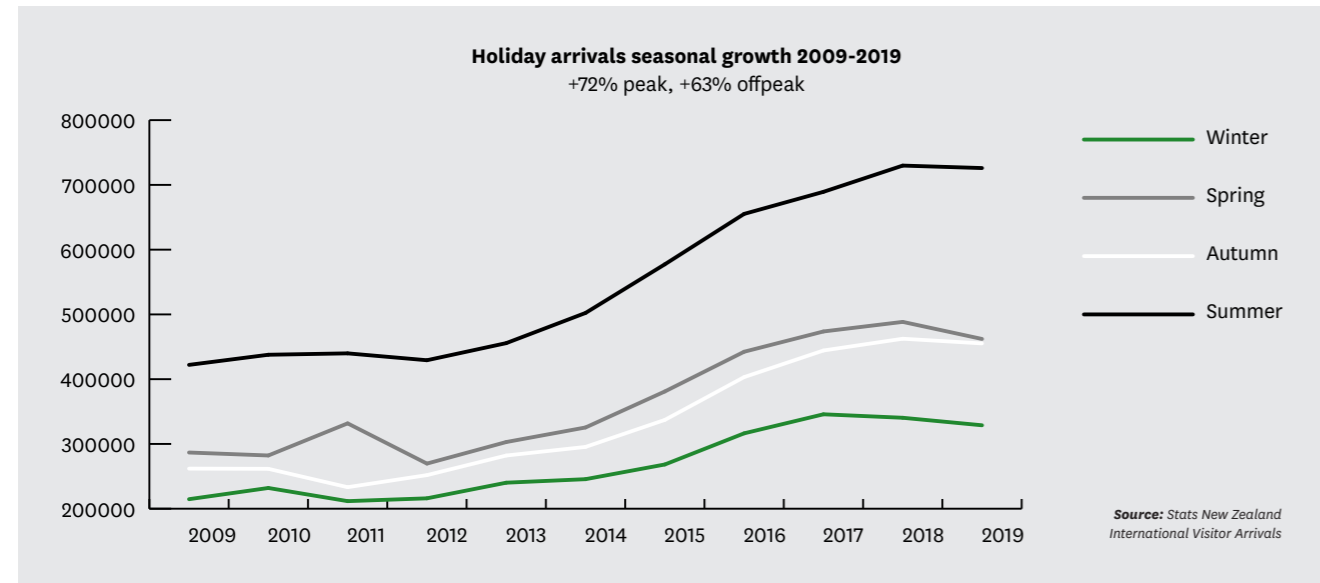
experiences and sustainability initiatives with revenue across more of the year.

- Keep New Zealand connected to the world by driving stable aviation connectivity across the year.
- Lift productivity of tourism and the visitor economy.

As New Zealand’s destination marketing organisation and as a Crown Entity, Tourism New Zealand has a role to intervene where there is market failure. Without focus, seasonality is likely to increase as a challenge as it did with the growth that occurred between 2009 and 2019. Tourism New Zealand will have a key role in helping grow off-peak international visitor spend.

Section Two: Operating environment and opportunities

Holiday visitor growth over time



Addressing the seasonality challenge in a sustainable way would support government growth aspirations. Growing off-peak visitor spend at a faster rate than peak would see more businesses operating well year-round and provide more jobs year-round, leading to more

sustainable communities. An industry that can trade well year-round has more ability to invest in sustainability initiatives, new product and experiences and staff, compared to one that does well for three months and struggles the rest of the year.

Broader contextual consideration across the four years

Growth is not guaranteed.

Whether in the peak season or off-peak growth is not guaranteed. New Zealand is a long-haul destination for most of our source markets and international tourism is a discretionary purchase. Weak economic environments and low consumer confidence can impact demand, as can oil prices, geo-political instability, or pandemics.

Growth with support from communities

Tourism provides many benefits to communities across New Zealand from employment, social amenities and vibrancy. We have seen in the past some communities have those benefits off-set from issues like congestion and pressure on shared infrastructure with too much growth too quickly. Maintaining the sectors social licence to operate is vital for the sector to maximise the benefits it provides New Zealand.

Sustainability will increase in importance.

Tourism New Zealand research shows that while sustainability is not a core driver of destination choice, it will likely increasingly become a consideration for travellers in the coming years, and our target audience are already more sustainably minded than others. New Zealand is a geographically isolated destination so aviation and the carbon associated with this will continue to be a key factor for getting to and from New Zealand. Research tells us that New Zealand is seen as a credible sustainable destination and we can continue to build on this by focusing on sector sustainability and tourism activity and movement that occurs once visitors arrive to

New Zealand. Research also tells us that consumers are looking for credible sustainability actions as they are wary of greenwashing. Tourism New Zealand can support this by working with the sector to share our consumer insight and bring more businesses into the Qualmark sustainability criteria to enhance sustainability “in destination”.

Technological change

While difficult to predict what technological advances will accelerate and be widely adopted in the future, we do know that technological advances will affect change and disrupt sectors. The role of technology could evolve to significantly impact how consumers plan and book travel, it could increasingly play a role in augmenting visitor experiences, and it will also impact the marketing channels Tourism New Zealand uses. Being aware to lead indicators of change and adaptable to make the most of opportunities will be critical to both Tourism New Zealand and the broader sector.

Sustainable funding

Tourism makes a significant contribution to New Zealand’s exports and broader economy and will play an important role in the Government goal of doubling exports within ten years. Our strategic intention is ambitious but focused on improving tourism’s overall contribution to New Zealand while improving the productivity and sustainability of the sector. Tourism New Zealand continues to look at the efficiently and impact of our activities to ensure spend is appropriately allocated across activities and markets. However, funding reductions will be a risk to fully realising our strategy and outcomes.

Section Three: Our four-year strategy and strategic intentions

Our four-year strategy aligns to the Government’s export growth goals.

Our ambition in the four-year period is:

- Grow visitor spend by \$5B at the end of 2027/28.
- Off-peak growth accounts for 70% of total growth, growing by \$3.5B to \$8.7B by the end of 2027/28

This is from a base of \$8.2B total spend and \$5.2B offpeak spend and in the 2022/23 year as measured in MBIE’s International Visitor Survey. The 2023/24 result will not be available to late 2024.



Our goal is not about growing the off-peak at the expense of the peak summer season, rather it is about increasing consideration for the off-peak, converting that into off-peak arrivals, while still marketing New Zealand as a year-round destination.

Improving the seasonality of international tourism demand for New Zealand will positively impact sector productivity, jobs, sustainability, regional development, and product development. The remit of Tourism New Zealand means it has the mandate and opportunity to resolve the long-standing seasonality challenge of the sector. However, we cannot do this alone and will need to engage and work with the sector to realise our ambition.

We have three strategic intentions to realise this opportunity:

1. Build extraordinary desire for New Zealand as a year-round destination.
2. Convert desire for New Zealand into off-peak visitation.
3. Accelerate the New Zealand tourism sector becoming a world leader in sustainability.

We need to ensure that there is first desire for a New Zealand as a destination, and work to make that desire year-round. By increasing the year-round desirability of New Zealand we can then focus on converting that desire into the off-peak. By growing visitation and spend in off-peak months, the industry gets more revenue year-round that positively impacts employment, asset utilisation, air connectivity, and allows businesses to invest in new experiences and sustainability initiatives. At the same time, we will grow the number of Qualmark accredited businesses, improve visitor awareness and industry support of Tiaki – Care for New Zealand and share consumer insights so the sector can prepare for the visitor of tomorrow.

OUTCOME:

Total tourism growth of **\$5B**
Off-peak delivers **70%** of total growth
Off-peak visitor spend growth of **\$3.5B** to **\$8.7B** by end of 2027-28

Achieved through three strategic intentions



Build extraordinary desire for New Zealand as a year-round destination



Convert desire for New Zealand into off-peak visitation



Accelerate the New Zealand tourism sector becoming a world leader in sustainability



Queenstown Otago

Section Three: Our four-year strategy and strategic intentions

Strategic intention one: Build extraordinary desire for New Zealand as a year-round visitor destination.

Why this is important:

Before we can get more visitors to come to New Zealand in off-peak months, we must first ensure that New Zealand remains a desirable holiday destination, and that desire for a holiday is not just in peak seasons, but at any time of the year.

This requires a concerted effort across our consumer and trade marketing activity to showcase the best of New Zealand year-round and ensure that the best off-peak experiences are a core part of this. This should help potential visitors and the travel trade see the benefits of what an off-peak holiday looks like but also maintain the broad year-round appeal of New Zealand as a destination.

A strong destination brand also has a broader impact on perceptions of New Zealand as a nation and on other export sectors.

What success will look like:

This intention is about continuing to build our destination brand. If successful we will see the following outcomes:

- Strong overall appeal of New Zealand as a holiday destination.
- Overall and off-peak consideration of New Zealand as a holiday destination increases.
- Strong preference for New Zealand as a holiday destination relative to competing destinations.

Our contribution:

We will achieve this through our marketing work that delivers effective campaigns to the right audience, maximising our reach through the right combination of channels.

Brand

Marketing campaigns that build desire for New Zealand as a holiday destination outright will remain a priority, but there will be additional focus on improving perceptions of New Zealand as a viable year-round destination. This provides both a platform to enable conversion of more visitors into off-peak months and ensures we invest in long term brand building for desirability of New Zealand for years to come.

We will continue to create bold and distinctive marketing campaigns informed by consumer insight using paid advertising, earned media coverage through public relations, our own newzealand.com consumer website and our social media channels. Our key aspects of differentiation from nature, Māori culture, people, and experiences are pivotal in making New Zealand stand out from the crowd.

Marketing campaigns are also utilised to support trade marketing and business events, ensuring consistency across consumer and business marketing.

Audience

Focusing on those who are actively considering New Zealand as a destination we will work to increase the proportion of those who are considering New Zealand in the off-peak. This audience already has New Zealand as a top holiday destination they are willing to visit and are already sustainability minded. We need to present the off-peak experience to this existing audience to enable more conversion into off-peak rather than peak season arrivals.

Using our research programme and local market knowledge we will seek to identify new audiences who may be more predisposed to holidaying in New Zealand in the off-peak and target these audiences if there is value in doing so.

Channels

Using a combination of paid marketing, earned media and public relations, and owned and social media channels to maximise reach and optimising our activity to increase the likelihood of booking a trip. Increasing media costs will require focus and creativity in how campaigns are developed and executed.

We know that many consumers using newzealand.com are still discovering more about what a New Zealand holiday can be and therefore we have an ability to increase consideration for off-peak travel.

We will look to extend the reach of our work by leveraging existing and new partnerships with media partners, brand partnerships, advocacy, trade and aviation partners.

Strategic intention two: Convert desire for New Zealand into off-peak visitation.

Why this is important:

Where the first strategic intention focuses on New Zealand's destination brand and off-peak desirability, there is still a job to do to convert that desire into arrivals and spend outside the peak season.

Converting desire to visit New Zealand into off-peak arrivals will provide more visitor spend for tourism operators in months when, for many, revenues typically decline, assets are under-utilised, and seasonal jobs end. Growth focused in the off-peak makes the tourism sector more productive, benefitting communities across New Zealand. It is also the time of year where communities have less pressure on mixed use infrastructure.

What success will look like:

Success will ultimately mean that visitor spend in the off-peak grows by \$3.5B from \$5.2B in 2022/23 to \$8.7B by the end of 2027/28, outpacing growth in the peak season. If successful we will see the following outcomes:

- The value of annual off-peak spend reaches \$8.7B in 2027/28.
- Off-peak spend accounts for 70% of total growth.
- Total visitor spend grows by \$5.0B (peak + off-peak growth)
- Regions benefit from more off-peak visitors and spend.
- Business events bids and wins increase to utilise new infrastructure and showcase New Zealand expertise.
- Effective conversion activity and joint ventures with airline and travel trade partners which will have an off-peak emphasis.

Improving demand for off-peak visitation will encourage airlines to offer year-round rather than seasonal flights.

Our contribution

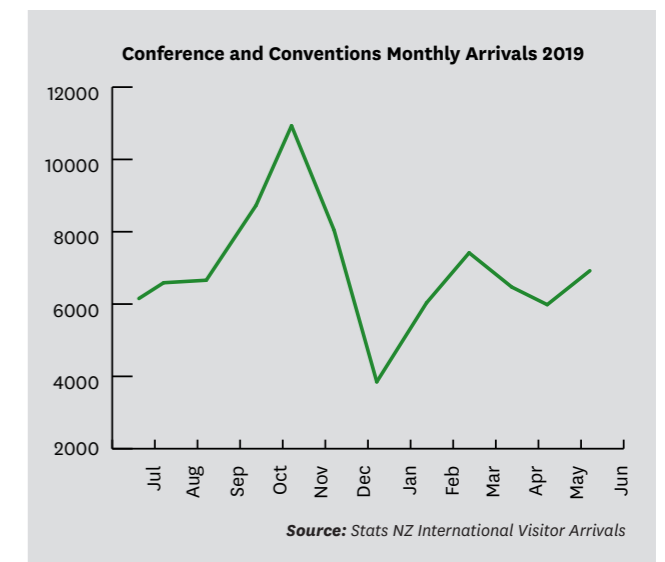
To achieve this, we will need to balance our investment into our markets and consumer segments to deliver for both short-term and long-term success. In each market we will need to evaluate a specific job to be done each year to maximise conversion opportunities whilst ensuring a long-term pipeline of visitors through long-term brand building. Some of our markets may already be more pre-disposed to visiting in the off-peak and we can look to grow arrivals in the near term. Other markets may have a relatively low

visitation rate in the off-peak, this may require a consistent effort over time to change consumer perceptions with more off-peak arrivals coming to fruition in years two, three and four of the strategy.

Our trade activity will focus on converting consideration and preference for New Zealand into off-peak arrivals. Whether that is trade training and educating the trade of the New Zealand proposition outside of peak season or focusing joint venture campaigns exclusively on off-peak travel periods.

Conversion doesn't only occur through the travel trade, our marketing work delivered through paid, earned or social media and newzealand.com has a role to play in not just building desire and preference but also enabling conversion whether that is via the trade sector or directly with a consumer booking a flight to New Zealand. Tourism New Zealand does conversion activity in close partnership with the New Zealand industry.

Our Business Events work that supports bids for conferences delivers not only the associated tourism spend but facilitates knowledge exchanges and exposure for New Zealand in a range of fields. Business events also have the benefit of being more even through the year and January and February having the lowest number of visitors. With new convention centres recently opened or due to open, there is an opportunity for New Zealand to win more major conferences that support off-peak months and showcase New Zealand expertise and facilitate knowledge and commercial exchange.



Section Three: Our four-year strategy and strategic intentions

Strategic intention three: Accelerate the New Zealand tourism sector becoming a world leader in sustainability.

Why this is important:

Creating and converting off-peak demand will provide the sector with more revenue year-round, more year-round jobs, and greater ability to invest in new product, experiences and sustainability initiatives.

Regardless of whether visitors come in the peak or off-peak season, expectations of a New Zealand holiday are high, and the sector needs to meet those expectations and be ready to evolve and adapt to changing consumer needs over time. Our destination brand can only be successful if the experience of what the brand promises is met or exceeded, turning past visitors into advocates for destination New Zealand.

What success will look like:

- More tourism operators are accredited with Qualmark against sustainable tourism criteria.
- Strong domestic social licence for tourism and recognition of the positive benefits of tourism
- Strong advocacy of New Zealand as destination from past visitors.
- Greater integration of Tiaki – Care for New Zealand across the sector resulting in greater visitor awareness.
- Positive stakeholder assessment of Tourism New Zealand's work and influence in achieving desired sector outcomes.
- Consumer research available for industry to use and help them adapt to consumer needs and emerging trends.

Our contribution

Growing the number of tourism businesses who have Qualmark sustainable tourism criteria accreditation and lifting more businesses into the gold standard and guiding consumer decision making through Qualmark's sustainable business criteria.

A research programme that provides accessible and understandable insights for the broader tourism sector to highlight consumer needs and emerging trends so that the sector can evolve in time to meet these needs, including what visitors want to experience at different times of the year so the sector can meet needs in both peak and off-peak seasons.

Working alongside partners to grow awareness of Tiaki - Care for New Zealand to influence visitor behaviour. This includes marketing activity as well as encouraging more of the industry choosing to participate in the programme so visitors have more visibility of Tiaki and the visitor behaviour standard throughout their journey in New Zealand.

Partnership with key stakeholders in the tourism sector so that they actively participate in Tourism New Zealand's work, understand our intentions and work, create reciprocal relationships where each partner benefits and create positive outcomes for visitors, the sector and New Zealand.

Providing advice and working alongside central and local government. Specifically, sharing Tourism New Zealand's knowledge of consumers, source markets and marketing expertise that help informs initiatives and policy.



Focus Areas Year 1 – 2024-2025

In the first year of our strategy, we have three distinct focus areas that reflect what is needed as first steps in a four-year strategy. Our strategic intentions reflect our four-year strategy. The below is where we will focus our work in year one to enable success in subsequent years.



Build consideration for off-peak travel to New Zealand

Build desire for New Zealand as a year-round destination and then focus on shaping that desire into consideration to visit NZ off-peak, (March-November)



Grow off-peak arrivals

Focus our brand, trade and partnership activity to convert our target audience into off-peak visitors.



Support sector sustainability and enhance visitor experience

Work with the sector to grow the number of sustainable tourism businesses, connect off-peak visitors with them, and create future demand through advocacy of visitor experiences.

Further details on these focus areas are outlined in Tourism New Zealand’s Statement of Performance Expectations 2024-2025.

Section Four: Assessing Performance

Our goal over the period is to grow total visitor spend by \$5B and off-peak visitor spend by \$3.5B to \$8.7B by the end of 2027/28. Off-peak should account for 70% of total growth.

This is based on the known 2022/23 visitor spend as reported in the International Visitor Survey. The 2023/24 result will not be known until late 2024.

We will utilise the International Visitor Survey to measure progress toward this goal but note that while it is a tier 1 measure of visitor spend, it does not capture wider export value of tourism such as aviation and short-term education which is reflected annually in Statistics New Zealand’s Tourism Satellite Account.

This target contributes to the broader Government goal of doubling exports by value within ten years and aligns with

Tourism New Zealand’s input into that strategy.

The below illustrates the linkages between government goals, our four-year strategic intentions, focus areas for year one of the strategy and the activities we undertake as part of our role.

Our Statement of Performance Expectations 2024-2025 contains more detail on how we will go about achieving the focus areas for the year, the specific performance targets we have set, and how our activities classes contribute to these.

GOVERNMENT GOAL: Doubling exports by value within ten years.			
TOURISM NEW ZEALAND FOUR YEAR AMBITION: Increase value of tourism by \$5B by end of 2027/28 Off-peak tourism spend contributes 70% of this by growing by \$3.5B to \$8.7B by end of 2027/28			
Four year strategy	Strategic intention 1	Strategic intention 2	Strategic intention 3
Statement of intent	Build extraordinary desire for New Zealand as a year-round visitor destination	Convert desire for New Zealand into off-peak visitation	Accelerate the New Zealand tourism sector becoming a world leader in sustainability
Year 1 of 4 Plan	2024-25 Focus Area 1	2024-25 Focus Area 2	2024-25 Focus Area 3
Statement of Performance Expectations	Build consideration for off-peak travel to New Zealand	Grow off peak arrivals	Support sector sustainability and enhance visitor experience
How our work contributes to achieving outcomes	Activity 1: Paid Marketing Campaigns		
	Develop and deliver brand and demand driving campaigns to the tourism consumer		
	Activity 2: Earned Media		
	Build desire, appeal, and awareness via New Zealand stories through third-party earned content and partnerships		
	Activity 3: Trade and Business Events		
Inspire, educate and partner with trade and tourism sector along with other sector experts to spread key tourism and business events messages and campaign information through their channels			
Activity 4: Owned Channels			
Develop, deliver and analyse engaging content and messages supporting our activity through TNZ owned channels, including newzealand.com			
Activity 5: Engage, Inform, Work with Sector and Government			
Engage, inform and work with the tourism sector, Government, and other agencies in New Zealand to support and strengthen the recovery of the sector.			

Section Five: Capability and organisational health

Our values

Tourism New Zealand’s whānau is dispersed across offices in nine countries around the world. Three core values bind our organisation: Courage or Māia, Care or Manaaki,

and Connection or Hononga. For each value we specify characteristics that help us to live these values and a whakataukī that reminds us of what the value is about.



People strategy

Our People Strategy is designed to support our team to thrive and meaningfully contribute to our organisational goals. This strategy has recently been updated to ensure our people are set up to deliver on our four-year strategic intentions and annual business plan. There are three focus areas in the people strategy:

- Leadership – where we lead with our values, inspire extraordinary impact, and adapt to emerging trends that shape the sector and our work.

- Capability – we learn fast, building skills for now and the future, development strengthens the impact of our people, and innovation amplifies the value created.
- Performance – high performance leads to world-class work and work that delivers the desired outcomes for New Zealand and visitors.

Pou Ārahi Māori strategy

Māori culture is one of the key factors that distinguish us as a unique destination. It is important that our work authentically represents Māori culture. To do so we need to have strong reciprocal working relationships with iwi and

Māori stakeholders, and internally Tourism New Zealand should have the capability and confidence to enable those partnerships and storytelling. Our sustainability strategy is also informed by tikanga and mātauranga Māori.

Our commitment to being a good employer - equal employment opportunities

Tourism New Zealand implements and monitors policy across the seven elements of being a good employer as defined by the Human Rights Commission.

- Leadership, accountability, and culture.
- Recruitment, selection, and induction.
- Employee development, promotion, and exit.
- Flexibility and work design.
- Remuneration, recognition, and conditions.
- Harassment and bullying prevention.
- Safe and healthy environments.

Diversity and inclusion

As a global organisation, Tourism New Zealand will always have a diverse workforce from different countries, cultures, and backgrounds and experiences. Our Diversity and Inclusion Policy ensures diversity and inclusion are at the heart of all our policies, procedures, and practices and we work hard to create an inclusive and high performing work environment.

Tourism New Zealand has a Kia Toipoto Action Plan to help close any gender or ethnic pay gaps. The plan focuses on ensuring people practices are free from conscious and unconscious bias, flexible working conditions are available to all and don’t undermine development of remuneration, and ensuring gender and ethnicity representation is balanced across the organisation.

Safe environments and wellbeing

Tourism New Zealand provides our staff with a work environment that allows to work safely and thrive to achieve their individual and organisational goals. Tourism New Zealand has a Safety and Wellbeing Framework with supporting policies and procedures. This framework is regularly reviewed, and policies and procedures updated

to ensure we meet our obligations under health and safety legislation.

Tourism New Zealand runs three safety and wellbeing committees to ensure employee participation in safety and wellbeing across our markets.

Sustainability

Sustainability is an increasingly important aspect of the tourism industry and we have developed Te Waharoa, our strategy which guides us on how we can be more sustainable. Tourism New Zealand’s approach to sustainability is informed by mātauranga Māori. The purpose of this strategy is to enhance the mana and mauri of Aotearoa New Zealand’s nature and people through our work.

Tourism New Zealand reports on its carbon emissions as part of the Carbon Neutral Government Programme. Our goal is to reduce carbon emissions by 42% in 2030 compared to a baseline year of 2019.

Systems and technology

Tourism New Zealand leverages technology to deliver world-class marketing and employee digital platforms. Utilising the best of cloud and SaaS technology this ensures that we can deliver efficiency and productivity benefits to a globally distributed workforce.

Following a period of investment in new platforms to enable the organisation to act at scale with potential visitors and the international travel trade programs, we are now focussing on streamlining and optimising the organisation’s existing systems.

There are two focus areas for ongoing development:

1. Improving Tourism New Zealand’s security posture in light of the increasing sophistication of cyber security threats ensuring our IT infrastructure model is designed to mitigate risks within our systems, remain future proofed, ensure connectivity, and be cost effective.
2. Leveraging the advances in AI technology to drive productivity improvement organisation-wide.

Section Six: Subsidiary companies

Qualmark Limited

Qualmark Limited (Qualmark) is the official tourism quality assurance agency in New Zealand. It is owned by Tourism New Zealand and endorsed across the tourism industry.

Qualmark's role is to:

- Enable visitors to select accommodation, transports, activity, and attractions with confidence knowing that the business has been independently quality assessed.
- To work with operators and the New Zealand tourism industry to deliver a superior customer experience, customer safety, and social and environmental best practice for a long-term sustainable industry.

Qualmark's evaluation systems assess a range of quality criteria that includes health and safety, environmental, people, and economic attributes. If a tourism business

meets the criteria a bronze, silver, or gold award is given. Accommodation providers also have access to a star grading which is common practice in the sector to help guide consumer decision making. Qualmark also provides support and advice on how tourism business can meet and move up the criteria standards.

Qualmark has recently had its assurance criteria evaluated and endorsed by the Global Sustainable Tourism Council. This provides Qualmark with an international endorsement that ensures both members and consumers that Qualmark certification meets global standards of sustainability.

Qualmark has approximately 2,200 licence holders who are annually assessed against the criteria. Qualmark supported tourism business throughout the pandemic by pausing licence fees, which were reintroduced in 2023.

isite

Visitor Information Network (trading as isite New Zealand) is New Zealand's official visitor information network. With over 50 sites across New Zealand, it is where visitors can find an array of information about where to go, what to do and make bookings. The isite brand is managed by Tourism New Zealand. Each isite is individually owned and operated by private and public owners. isite governance is provided via an incorporated society. Accredited members must meet staff standards in training, professionalism, and information technology.

Once visitors arrive in New Zealand, they need to find out what to do and where to go. Visitor information centres remain an important source to find this information. TNZ supports the isite network to provide quality information to visitors. To fulfil this role, isite New Zealand has developed a new strategy that identifies its inherent strength with customers as "no one can connect you to this place like us."

As a network, isite aspires to:

- be the trusted provider of visitor information and booking services for Aotearoa New Zealand.
- be a network of friendly guides providing unbiased, independent advice that combines their deep knowledge, local expertise and shared value set.
- be strongly connected to the communities in which they operate.
- enrich the experience of all manuhiri.

The networks brand promise is 'walk in a visitor, leave an explorer' providing inspiration for those who seek.

To achieve this as a network, the organisation has three focus areas:

- Build brand – increase isite appeal and the instore storytelling experience to enhance the visitor experience.
- Visitor engagement - convince international visitors that an isite will provide the most complete answer and enrich the experience of our manuhiri.
- Member value - enable isite personnel to deliver the brand promise – the trusted guide – efficiently, reliably, and productively.



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