

Statement of Intent (SOI) 2025/26-2028/29



**100% PURE
NEW ZEALAND**

February 2026



 Hump Ridge Track
Fiordland

Presented to the House of Representatives pursuant to section 149 of the Crown Entities Act 2004. New Zealand Tourism Board t/a Tourism New Zealand.



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Foreword from the Chair and Chief Executive

Last year we presented a new Statement of Intent setting out Tourism New Zealand’s strategy for the four years from 2024/25 to 2027/28. This updated Statement of Intent sets out the Tourism New Zealand strategy for the four years from 2025/26 to 2028/29 in response from a new Letter of Expectations from the Minister for Tourism and Hospitality.

Both the previous and this Statement of Intent are focused on delivering growth. Last year the strategy was focused on growth occurring in off-peak months to overcome the longstanding challenge of seasonality.

Our new Statement of Intent reflects the desire for short-term and long-term growth, addressing the Government’s two tourism objectives:

- to return visitor volumes to 2019 levels by the end of 2026; and
- to double the value of international visitor spend to \$19.8B by 2034.

The strategy provides a framework for Tourism New Zealand’s contribution to accelerate the growth of international arrivals in the short-term, alongside maintaining desire for New Zealand as a visitor destination and ensure enduring growth continues over the long-term.



Paul Brock
Board Chair



René de Monchy
Chief Executive



Section one: The nature and scope of our work

Our role

Tourism New Zealand is a Crown entity 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 to:

- 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 will have a pivotal role in helping to restore visitor volumes to 2019 levels by the end of 2026, and then drive growth to double the value of international tourism spend to \$19.8B by 2034.

We have factored stronger growth into the first two years of the strategy, providing a springboard to achieve the longer-term value growth goal. Note the timeframe for doubling the value of tourism spend is outside the period of this Statement of Intent, but the strategy has been developed with the long-term pathway to \$19.8B in mind.

As a marketing agency, our primary focus is to market New Zealand as a desirable travel destination for international visitors and help convert that demand into arrivals, working alongside partners in the sector to increase the value of visitors over time. This activity includes paid marketing, earned media coverage and public relations, marketing through our own social media channels and our newzealand.com and travel trade websites, and marketing with the travel trade such as travel agencies and airlines.

New Zealand's destination brand also provides a halo effect that supports broader export sectors. This brand equity is a critical enabler for tourism export growth and plays a broader role in strengthening New Zealand's export economy.

Although Tourism New Zealand does not lead tourism policy, destination management or product development, we support the sector to deliver a high-quality visitor experience. Our in-depth understanding of our target audience allows us to provide the sector with a range of insights that help them meet visitor needs and expectations.

Tourism New Zealand partners with industry (operators of tourism products and services), regional tourism organisations (RTOs), the Ministry of Business, Innovation and Employment (MBIE), Department of Conservation, New Zealand Māori Tourism, NZ Inc partners and key industry associations to share consumer insights, collaborate on campaign activity, and work to ensure the supply side of tourism experiences and infrastructure is aligned to the demand from international visitors.

Tourism New Zealand has responsibility for two related organisations:

- **Qualmark:** This subsidiary is 100% owned by Tourism New Zealand and is New Zealand tourism's quality assurance agency with around 2,000 paying members. Through its Sustainable Tourism Business Criteria, it independently validates and provides assurance that a tourism business will deliver quality experiences to visitors.
- **isite New Zealand:** This is the trading name of VIN Incorporated, an incorporated society controlled by Tourism New Zealand that provides visitor information and booking services across a nationwide network of isite centres. Tourism New Zealand manages the isite brand and provides governance support.

Our purpose

Tourism New Zealand's purpose is to enrich New Zealand 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 elements are important: without a visible positive contribution from tourism to New Zealand, the sector's social licence to operate is diminished. And without quality experiences, visitors are less likely to advocate for New Zealand as a destination, which in turn affects international reputation and future growth.

The New Zealand tourism sector

In marketing New Zealand as a destination, Tourism New Zealand collaborates and considers multiple stakeholders across the New Zealand tourism sector:

- **Visitors** include consumers/potential visitors considering New Zealand as a destination, and actual visitors who have often made a long-haul trip of a lifetime to New Zealand. Visitors expect a high-quality experience and can act as advocates, recommending New Zealand as a holiday destination to family, friends, and colleagues.
- The **New Zealand public** expect the tourism sector to support businesses and communities. There is also an expectation that tourism will not negatively impact the environment, infrastructure or the ability for domestic visitors to enjoy tourist activities and places. New Zealanders share tourism experiences with international visitors and employees in the sector.
- The **tourism industry** comprises organisations that provide experiences for visitors, including:
 - **accommodation:** hotels, motels, hostels, bed and breakfasts, short-term rentals
 - **transport:** airlines, cruise lines, railways, car rentals, bus companies
 - **attractions/activities:** tourism experiences, cultural sites
 - **hospitality:** restaurants, cafes, bars, wineries, catering
 - **hosting:** conference and meeting facilities
- **Intermediaries** are the organisations or individuals that distribute, market, and sell tourism products and services. They are the bridge between tourism service providers (like airlines, hotels, and tour operators) and visitors and include:
 - **travel agents:** help plan and book trips
 - **tour operators:** package and sell travel products
 - **online travel agencies (OTAs):** websites or digital platforms that allow travellers to search, compare, and book travel products e.g. Booking.com or Trip.com
 - **global distribution systems:** technology platforms connecting providers and sellers
- **Regional Tourism Organisations (RTO):** often council or local membership-funded organisations, they carry out destination marketing and destination management at a regional level.
- **Central and local government** includes the Minister for Tourism and Hospitality who is responsible for tourism in New Zealand and sets the Government's priorities for the sector. MBIE creates tourism policy and provides advice to the Government. Other NZ Inc agencies also intersect with tourism including the Department of Conservation, Immigration New Zealand, Ministry of Foreign Affairs & Trade, New Zealand Trade & Enterprise, Education New Zealand and New Zealand Story.

Section two: Operating environment

Government priorities

Aligned with the Government's goal to double the value of exports over 10 years, the Minister for Tourism and Hospitality has outlined two clear expectations:

- return visitor volumes to 2019 levels by the end of 2026; and
- double the value of international tourism spend to \$19.8B (IVS) by 2034.

Tourism New Zealand's 2025/26 Statement of Performance Expectations and performance measures reflect the above expectations.

The Tourism Growth Roadmap sets out short-term (to 2026), medium-term (to 2029) and long-term (to 2034) initiatives and investment that supports demand generation to meet volume and value targets, and supply-side initiatives to ensure the tourism system is enabled for growth and delivers positive tourism outcomes for New Zealand and international visitors.

The Government has provided additional time-bound funding to Tourism New Zealand to increase marketing activity and help achieve these outcomes. In the second

half of 2024/2025, Tourism New Zealand received an additional \$17M from the International Visitor Conservation and Tourism Levy (IVL) as part of the Government's Tourism Boost initiative. An additional \$24M in Budget 2025 was allocated from the IVL as part of the Government's Tourism Growth Roadmap, increasing TNZ's annual funding in 2025/26 to \$130M. This has helped to accelerate growth rates to date and build momentum to achieve the growth objectives. There have also been other demand-side initiatives from the Government that will contribute to growing tourism such as Regional Tourism Boost funding, Events Attraction funding, and reducing some visa barriers for visitors from China.

These demand-side initiatives are a welcome support to growing tourism. In addition, external factors can also both drive and dampen demand. Tourism New Zealand will remain agile and strategically adapt to these external dynamics to deliver growth aligned with the Government's objectives.

Contextual considerations – opportunities, risks & mitigations

Aviation capacity

Aviation capacity has been below 2019 levels due to ongoing global aircraft and engine shortages. Recent announcements of new flight routes are encouraging, and overall capacity for the upcoming summer period is expected to reach or closely match pre-pandemic levels.

Some routes may have adequate seat capacity but lack competition from multiple airlines, limiting price competitiveness and suppressing demand. Some routes can have limited availability at certain times of year.

Mitigation: Tourism New Zealand will continue to work closely with airline partners to drive consumer demand for travel to New Zealand. We will actively monitor aviation capacity and ensure marketing efforts are aligned to support strong connectivity and route performance.

Geopolitical and economic uncertainty

The geopolitical and economic outlook may increasingly deter or defer travel.

Increased global conflict can directly affect aviation routes, resulting in cancellations or denting consumer confidence and becoming an additional barrier to booking travel. In its Global Risks Report 2025, the World Economic Forum highlights that 2025-2027 is expected to be increasingly turbulent with a lack of optimism about global stability, with long-term optimism also decreasing.

In its World Economic Outlook (April 2025), the International Monetary Fund forecast slower economic growth for the remainder of the decade, below the global growth that supported strong tourism growth in the 2010s. For 2025-2030, global real gross domestic product (GDP) growth is forecast to average 3.1% per annum, compared to 3.7% in the prior decade.

Mitigation: Tourism New Zealand cannot influence these factors but maintains a portfolio of source markets and can increase/decrease investment and resource by market to take advantage of market conditions (and avoid overinvestment) and maintain the efficacy of our activity. The continued investment in the longstanding *100% Pure New Zealand* brand also helps to ensure there is a strong emotive pull towards New Zealand that can overcome these issues.

Changes in visitor segments

We expect the composition of New Zealand's international visitor profile to evolve by source market, visitor segment, and purpose of visit. There have been significant shifts in some segments in the post-pandemic period that we do not expect will return in the short- to medium-term.

For the year to October 2025, business travel had only recovered to 59% of 2019 volumes, compared to 89% for total arrivals. Around two-thirds of business travel is from Australia. We do not expect business travel to fully recover, with the shift to online meetings and increased cost considerations. Note that conference travel is a separate arrivals category, and we expect that to recover strongly.

Group travel out of China has also significantly declined as a preferred style of travel. This previously generated large volumes of arrivals, but consumer trends have evolved to favour more independent or smaller group travel. New Zealand is not ideally priced for low-value, short-stay group travel, and we do not expect that scale of group travel out of China to return.

Mitigation: The expected shortfall from both these segments needs to be countered by stronger growth in other markets and segments. By following global travel trends, adapting to consumer preferences, and maintaining our portfolio approach to markets we can identify markets and segments that offer the best growth opportunities.

Balancing growth with social licence

International tourism has maintained a strong social licence among New Zealanders. In the year ended June 2025, 93% of New Zealanders agreed international tourism was good for New Zealand.

There are some specific pressures in particular locations and times of the year which provide a challenge for the sector. The relatively strong volume growth required to reach 2019 arrivals volumes by December 2026 could lead to an increase in real and perceived pressures. While New Zealand has previously welcomed this volume of visitors, the rate of growth and the volume uplift in the short-term may have a detrimental impact on social licence.

Mitigation: While Tourism New Zealand is not responsible for tourism infrastructure or destination management, we do monitor social licence indicators and can play an important role in shaping visitor demand. By encouraging travel across the full year and promoting itineraries that spread visitors across multiple regions, we can help ensure more communities benefit from tourism. This approach also helps ease pressure on specific areas by supporting a more even distribution of travel across both time and place.

Section two: Operating environment

Visitor experience

For many visitors, New Zealand is a trip of a lifetime that requires significant time, money, and planning to realise. Their expectations are high, and the experience needs to live up to the promise of the destination and the 100% Pure New Zealand brand. At the same time, many other newer “on trend” destinations are opening up that we are competing with on experience.

Research from MBIE’s International Visitor Survey shows the majority of visitors are satisfied with their New Zealand experience, their expectations are met or exceeded, and they are likely to recommend New Zealand as a destination.

Mitigation: To help maintain high levels of visitor satisfaction over the long-term, Tourism New Zealand provides insights into evolving consumer preferences, and shares this with the sector to help inform new product development and market readiness.

Sustainability considerations

From research into our target ‘Active Considerer’ audience, we know consumers who want to come to New Zealand are more likely to consider sustainability as a part of their decision-making process, with 81% of them being sustainably minded. For many, New Zealand is a long-haul holiday that will result in a higher aviation carbon impact, however it is often a once-in-a-lifetime destination, and consumers are more likely to consider sustainability in their on-ground choices if on offer.

Mitigation: Through Qualmark we support tourism operators to help them meet sustainability standards that inform consumer decisions and may ensure inclusion of operator products in some international distribution channels. We also provide visitor insights to the sector.

Media inflation

New Zealand remains a niche holiday destination in a highly competitive global tourism market. Other destinations are significantly increasing their investment to attract high-quality visitors, intensifying the competition. To remain competitive, destination New Zealand must continue to innovate and invest strategically to maintain appeal. At the same time, global media cost inflation continues to impact the reach and effectiveness of Tourism New Zealand’s marketing efforts.

Mitigation: Additional funding in 2025/26 has strengthened the impact and reach of our marketing. We assess the efficiency and effectiveness of our activities to ensure resources are optimally allocated across markets. Our marketing is informed by consumer insights, enabling us to tailor campaigns that are relevant to target audiences to deliver meaningful impact. Tourism New Zealand also focuses on media optimisation and delivering campaigns that generate earned media, helping to extend our reach and maximise value for money.

Technological change

Evolving technology impacts tourism marketing, planning and booking of travel, and the on-ground experience. Artificial intelligence (AI) is playing an increasingly influential role in travel planning, with itinerary options now easily generated through AI-powered tools. Its role in travel distribution is expected to expand, reshaping how consumers book travel.

Mitigation: To remain competitive, we need to be discoverable on the right platforms, identify emerging opportunities, and continuously improve our use of data analytics and advanced tools to effectively segment and target audiences. We work closely with global digital platforms and sector partners to adapt to technological changes and align efforts across the distribution chain. For the on-ground experience, the sector must also respond to evolving consumer preferences around technology use, ensuring relevance and impact. Tourism New Zealand will share consumer insights to support this adaptation.



Rotorua
Bay of Plenty

Section three: Our strategy and strategic intentions

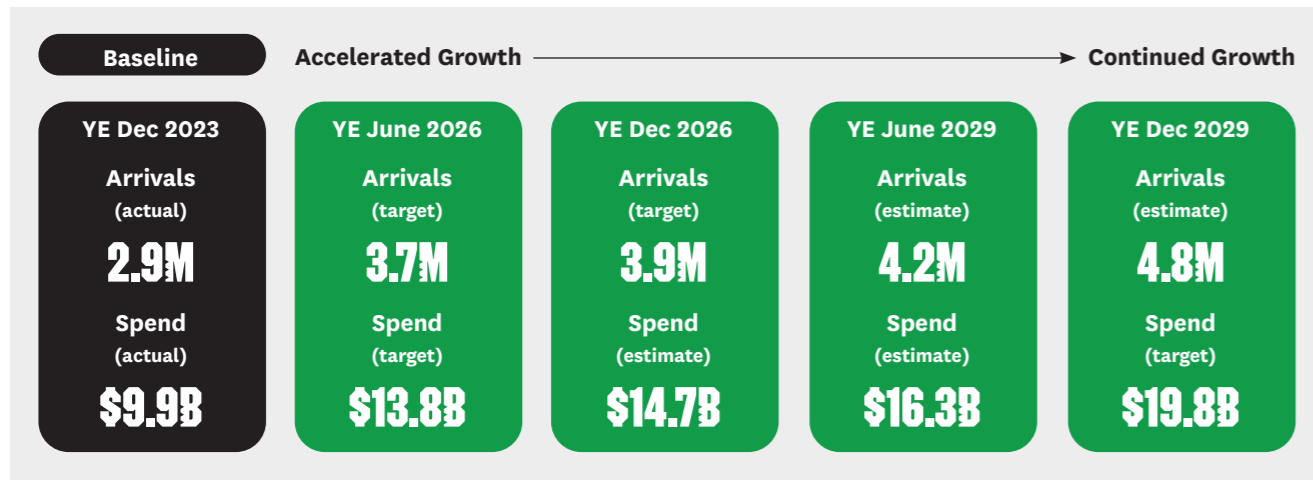
The Government has prioritised recovery to 2019 visitor volumes by the end of 2026 and doubling the value of tourism exports to \$19.8B by 2034.

This requires a significant acceleration in volume growth of circa 6% year-on-year in 2025, then 11% year-on-year in 2026. While ambitious, the near-term growth targets will provide a strong foundation for the goal of doubling the value of tourism exports by 2034.

We estimate that by June 2029, the end of this strategy’s timeframe, New Zealand will have around 4.2M annual

international visitor arrivals, responsible for around \$16.3B in spending.

To achieve long-term tourism growth, Tourism New Zealand must focus on accelerating visitor conversion and sustaining future demand. This means actively moving audiences closer to booking, and continuing to invest in brand strength across a diverse range of markets.



Maintaining a strong pool of Active Considerers ensures we have a primed audience ready to convert, while market diversity builds resilience against external shocks and supports sustained growth over time.

Tourism New Zealand has a significant role to play, but enrolling stakeholders, enlisting support, and aligning the sector in pursuit of the objectives to collectively deliver for New Zealand and international visitors is crucial.

We have developed three strategic intentions to guide our work over the next four years, and help contribute to the volume and value objectives:

1. Create enduring desire for destination New Zealand (“Brand”)
2. Convert desire into visitation (“Visitor”)
3. Partner with sector to enable growth (“Sector”)

The intentions reflect the core role of Tourism New Zealand to market New Zealand as a desirable visitor destination, converting that desire into international arrivals, and working alongside the tourism sector to ensure growth is delivered in a productive and sustainable way.

The intentions are interdependent and mutually beneficial. For example, converting visitor demand into bookings supports sector growth and enables reinvestment. Effective partnerships with the sector helps to drive

conversion via high-quality products and attractive promotions, giving visitors more reasons to book. Strong brand desire inspires and encourages operators to meet visitor needs, delivering on the promise of the brand and creating advocacy for New Zealand.



Fox Glacier
West Coast

Section three: Our four-year strategy and strategic intentions

Strategic intention one: Brand - Create enduring desire for destination New Zealand

Why this is important:

This intention is delivered through our long-standing *100% Pure New Zealand* brand and marketing activity. This ensures there is always a powerful emotional connection and relevance between our audience and destination New Zealand, helping overcome the barrier of a niche, premium, long-haul destination in an increasingly competitive global tourism landscape.

New Zealand needs to remain top of mind for potential visitors in the face of global competition and shifting travel trends.

A strong brand, and effective marketing, creates enduring desire for New Zealand and fills the ‘dream, discover, plan, book’ consumer/visitor funnel with intent (not just interest) and helps attract visitors in both the short- and long-term. It lays the groundwork for future arrivals, repeat visitation, and pricing power. When desire is sustained over time, it supports resilience in the face of economic cycles and enables destination New Zealand’s appeal to command value, rather than compete on price.

Enduring desire is built on our unique and authentic brand and marketing, developed with consumer insight, which showcases New Zealand as an outstanding destination – including our landscapes and scenery, welcoming people and unique Māori culture.

Our brand aligns the sector around a shared purpose, ensuring that our campaigns, partnerships, and experiences reinforce the brand promise and create advocates out of visitors to help share the destination story.

Our contribution:

Tourism New Zealand invests in the *100% Pure New Zealand* brand, with distinctive brand assets to ensure our work is unique and resonates with our audience. We deliver deep audience insights to help the sector understand the motivators and barriers to visiting New Zealand, and stay attuned to emerging consumer trends. We showcase iconic landscapes and natural attractions, Māori culture, warm welcoming people and the breadth of activities for visitors.

Through our marketing activity we grow share of mind, reaching the right audience through the right channels. Our Active Considerer audience already have New Zealand as a top holiday destination that they are willing and able to visit, and our work seeks to make New Zealand their most preferred destination, guiding them closer to booking. Building this primed audience provides the base for marketing activity and partnerships focused on converting demand.

When our investment in the destination brand is successful, *100% Pure New Zealand* is the “north star” aligned with the industry and wider sector and increases the impact of our brand.

Success

Success for this intention includes:

- A strong pool of Active Considerers (our target audience) across priority markets actively thinking about visiting New Zealand
- High preference for New Zealand among our target audience, relative to competing destinations
- Strong performance across all stages of the consumer/visitor journey and more consumers moving into a booking mindset
- Sustained year-round interest in New Zealand and across its regions
- A recognisable, consistent, and emotionally resonant brand that connects with audiences globally
- Amplified brand impact through collaboration with industry, earned media, and advocacy from past visitors

Strategic intention two: Visitor - Convert desire into visitation.

Why this is important:

Global interest in New Zealand is strong and as of September 2025 there are over 150M consumers in our top eight markets that we consistently research who are actively considering New Zealand as a holiday destination. To meet our growth ambitions, we must shift potential visitors from dreaming to planning, booking, and ultimately visiting.

The tourism landscape is dynamic with shifting consumer preferences, emerging source markets, and evolving global conditions. To remain competitive, we must balance our efforts across the consumer funnel ensuring we stay top of mind when visitors move from consideration into a booking mindset. To maximise short- and medium-term growth, we must invest flexibly across markets to capture growth opportunities and build long-term resilience.

Understanding and addressing the barriers to booking is critical. By working closely with partners, we can help identify and address these barriers and present compelling reasons to choose New Zealand now. This includes connecting our marketing efforts to distribution channels to support conversion.

In addition to addressing barriers to booking, it is important to actively promote compelling reasons to visit New Zealand year-round. Showcasing events, unique experiences, and tailored product offerings can help drive visitation.

Travel intermediaries and operators sell and deliver New Zealand’s tourism products and experiences. Tourism New Zealand creates demand through marketing and brand activity, and these partners convert that demand into actual bookings. Campaigns that are relevant, timely, and aligned with what the market can deliver will maximise conversion and support sector growth.

Our contribution

Tourism New Zealand balances its marketing across the consumer funnel – building future demand while actively moving audiences closer to booking. Through our market portfolio approach, we invest flexibly across key and emerging markets to capture growth and build resilience.

We work with airlines, travel trade, and conversion partners to develop campaigns that feature compelling, bookable products. Campaigns are timed to reach audiences during key booking windows. We provide training and resources to help partners confidently sell New Zealand.

We are seeing AI being used more by consumers. Travellers use AI for personalised trip planning, and travel platforms leverage it to enhance user experience and streamline bookings. Tourism New Zealand will continue to adapt its marketing work and the work we do with partners to respond to this.

Our consumer research programme provides insights into motivators, barriers, and knowledge gaps – informing campaign propositions and reducing friction in the booking journey.

We leverage events to drive timely visitation, including:

- Supporting targeted events that drive visitation or coverage of New Zealand in key international markets
- Business events that deliver economic impact and knowledge exchange, positioning New Zealand as a destination for thought leadership and innovation

Success

Moving our audience closer to booking and converting demand into arrival should result in:

- Getting more consumers who are in the booking mindset to commit by making a booking
- Effective joint venture activity with partners to drive incremental bookings
- Increased engagement via the newzealand.com website for visitors to plan and move closer to making a booking
- Growing visitor arrivals and visitor spend in support of the Government growth objectives for tourism
- Growth of visitor arrivals year-round in New Zealand
- Benefits of tourism growth are shared across regions of New Zealand
- International tourism maintains social licence among New Zealanders
- Leveraging relevant events in New Zealand to drive visitation at specific times
- A strong pipeline of business events through the Conference Assistance Programme

Section three: Our four-year strategy and strategic intentions

Strategic intention three: Sector - Partner with sector to enable growth

Why this is important:

Tourism New Zealand partnering with the sector is essential to shape visitor demand, enhance the visitor experience, and enable long-term, productive, sustainable growth for both the industry and New Zealand. When we work together, the collective impact is greater than any individual effort.

Tourism recovery across New Zealand has varied by region, with each area experiencing a different pace of rebound. Product development is essential for a resilient and sustainable tourism sector and it is important for each region (or regional cluster) to have a strong product proposition for international visitors. This means understanding changing traveller preferences, responding by evolving and diversifying to meet these needs, and delivering compelling product that attracts new and returning visitors.

As New Zealand nears a return to 2019 international visitor arrival levels, identifying the greatest capacity opportunities to help double the value of tourism exports will be critical. Building more consistent, year-round visitation will improve industry productivity and help ease the pressure on peak seasons – supporting long-term sustainability and maintaining social licence.

Sustainability is core to New Zealand’s destination promise and increasingly important to our audience, who are more environmentally conscious than the global average. Operators need to meet these expectations and help the drive for visitors to leave as advocates for destination New Zealand.

Our contribution

Partnership underpins our work across brand development, marketing, and conversion. By working together, we can ensure tourism continues to deliver meaningful benefits for New Zealand.

We will continue to partner with the sector to align on goals and share our marketing plans.

We will continue to create opportunities for the New Zealand tourism industry to participate in our marketing and partner with travel intermediaries to deliver campaigns.

We will maintain strong relationships with RTOs and industry bodies to ensure regional perspectives inform our work and help balance demand and supply.

We will share market intelligence and consumer insights to support product development and market readiness.

We will promote year-round travel through targeted marketing and by equipping the sector with insights to help them tailor offerings to seasonal opportunities, helping drive conversion of demand when capacity and product is available.

Tourism New Zealand will actively support the implementation of the Tourism Growth Roadmap announced by the Minister for Tourism and Hospitality in June 2025. Our consumer insights and market knowledge will provide valuable input into identifying opportunities and informing policy development aligned with the Roadmap’s objectives.

We will work to ensure tourism businesses across the industry have Qualmark accreditation, supporting quality assurance and a pathway to increasingly sustainable practices that meet consumer/visitor expectations.

Tiaki – Care for New Zealand is a valuable and well-established platform for positively influencing visitor behaviour. We will continue to work with industry partners to embed *Tiaki* throughout the visitor journey, helping to support social licence and strengthen community support for tourism.

Success

If we have successfully partnered with the sector we should see:

- Strong sector engagement with TNZ campaigns, toolkits, and industry resources
- Tourism New Zealand delivering activity that converts demand into bookings (referrals) for operators
- Qualmark supporting best practice and sustainable tourism operations
- Strong industry relationships and positive stakeholder ratings of Tourism New Zealand performance
- *Tiaki – Care for New Zealand* behaviours and expectations are embedded in the international visitor experience
- International visitors leave as advocates for New Zealand
- New Zealanders benefit from international tourism
- International tourism maintains social licence among New Zealanders
- Benefits of tourism growth are shared across regions of New Zealand
- Growth in visitor arrivals and visitor spend in support of the Government growth objectives for tourism



Doubtful Sound
Fiordland

Section four: Assessing performance

The Statement of Intent is informed by the Government tourism objectives

The Statement of Intent is informed by the two objectives in the Minister for Tourism and Hospitality’s Letter of Expectations: to return visitor volumes to 2019 levels by the end of 2026, and to ensure the value of international tourism is on track to reach \$19.8B by 2034.

The below shows the link between the Government objectives, our four-year strategic intentions, the first year of the four-year strategy (reflected in the Statement of Performance Expectations 2025/2026), and the activities we do to help deliver the desired impacts and outcomes.

It also shows how our activities are intended to impact the consumer/visitor funnel we use as a framework for growing desire for New Zealand, helping the audience move closer towards booking, and ultimately making a booking and having a positive experience that benefits both the visitor and New Zealand.

Underpinning our performance framework is:

- A focus on organisational health to maintain strong staff engagement and performance
- A proactive portfolio approach to our markets that ensures we have effective investment and resources in each market to reflect the potential for these markets to deliver the overall strategic goals. We constantly

monitor market performance, the forward outlook for growth and the operating environment to ensure we have our resources effectively allocated across markets. Every quarter we formally review this allocation and make decisions about whether there needs to be any reallocation to reach our desired growth objectives. This also includes managing the balance of marketing activity to convert primed demand in the short-term, and build and maintain demand for conversion in the long-term

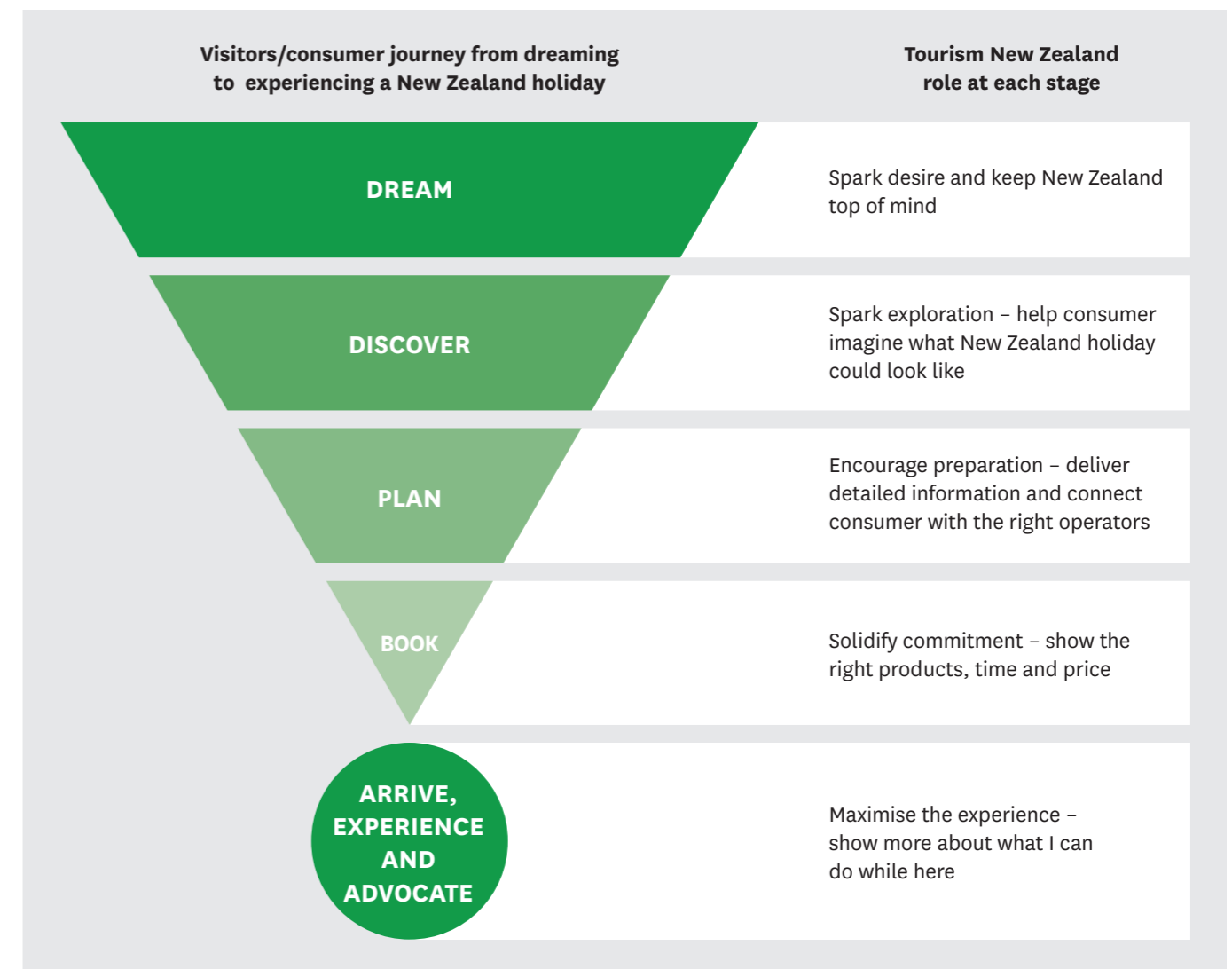
- An approach to marketing that ensures we have a constant and consistent presence across key channels to engage audiences where we use data, automation, testing frameworks and constant optimisation. As well as this in-campaign optimisation, we conduct post-campaign reviews to ensure our spending on any activity is efficient in delivering the desired results and maximises the impact of specific activities. This approach helps to inform planning for future activity by taking learnings from past activity, applying these learnings to future activity
- Regular monitoring of progress toward targets includes utilising best practice, forward-looking data for proactive decision-making, and evaluation of data accuracy and new data sources that can provide strong signals to future performance

PURPOSE: Enrich New Zealand and all who visit					
OBJECT: Ensure that New Zealand is marketed as a visitor destination to maximise long-term benefits to New Zealand					
FUNCTIONS: to develop, implement, and promote strategies for tourism and to advise the Government and the New Zealand tourism industry on matters relating to the development, implementation, and promotion of these strategies.					
GOVERNMENT OBJECTIVES: Return visitor volumes to 2019 levels by the end of 2026 and ensure that tourism value at the end of the strategy period is on track toward doubling the value of international tourism exports to \$19.8B by the end of 2034.					
Strategic Intentions	Focus Areas (FY26 SPE)	Delivered through activity	Impact of activity (on the consumer funnel)	Impact of activity (as measured in FY26)	Outcomes (as measured in FY26)
Create enduring desire for destination New Zealand	Increase share of mind and intention to book	<ul style="list-style-type: none"> • Paid marketing campaigns • Earned media • Trade and business events • Owned channels 	<ul style="list-style-type: none"> • Increase desire and preference for NZ • Grow audience pool • Move consumers from dreaming toward booking 	<ul style="list-style-type: none"> • Engaged users • Equivalent advertising value 	<ul style="list-style-type: none"> • Global brand preference • Booking mindset
Convert desire into visitation	Accelerate conversion and arrivals	<ul style="list-style-type: none"> • Paid marketing campaigns • Earned media • Trade and business events • Owned channels • Government / sector engagement 	<ul style="list-style-type: none"> • Move consumers from planning to booking • Consumers make a booking • More business events bid on, won and hosted 	<ul style="list-style-type: none"> • Trade and airline joint venture ROI • Value of conference bids supported 	<ul style="list-style-type: none"> • Total visitor arrivals • International visitor spend
Partner with sector to enable growth	Partnering with industry for growth	<ul style="list-style-type: none"> • Paid marketing campaigns • Earned media • Trade and business events • Owned channels • Government / sector engagement 	<ul style="list-style-type: none"> • Visitor experience meets or exceeds expectations • Visitors advocate for NZ • Sector and New Zealand benefits from international tourism 	<ul style="list-style-type: none"> • Referrals to industry • Stakeholder rating of Tourism New Zealand 	<ul style="list-style-type: none"> • Recommend NZ as a holiday destination • New Zealanders agree international tourism is good for New Zealand

Consumer/Visitor funnel

This is a framework for how we move consumers into consideration of New Zealand, creating desire and then moving them closer to making a booking and turning up as visitors over time. We allocate our marketing effort across the funnel depending on the overall objectives and specific market jobs to do. While our activity next year is heavily focused on moving consumers from dreaming to booking,

and then converting those bookings to deliver more visitors, we still maintain brand and marketing activity to encourage more consumers to actively consider New Zealand, building a pipeline of demand to support long-term growth.



Section five: Capability and organisational health

Global workforce

Tourism New Zealand's whānau is dispersed across offices in nine countries around the world.

We are committed to being a good employer and use the seven elements of being a good employer as defined by the Human Rights Commission to monitor this.

- 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

People strategy

Our People Strategy is designed to support our employees to thrive and meaningfully contribute to our organisational goals. There are three focus areas in the People Strategy:

- Leadership – we lead with our values to inspire extraordinary impact; the organisation is adaptive and future fit; and leadership sees and embraces emerging trends to shape our work and the sector

- Capability – we learn fast to build skills for now and the future; development strengthens the impact of our people; and adaptability and innovation amplifies the value created
- Performance – high performance leads to world-class work; we deliver work that enriches New Zealand and those who visit; and we adopt new technology to create a step change in our productivity.

Diversity and inclusion

As a global organisation, Tourism New Zealand has a diverse workforce from different countries, cultures, 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 ethnicity pay gaps. The plan focuses on ensuring people practices are free from conscious and unconscious bias and ensures gender and ethnicity representation is balanced across the organisation.

Safe environments and wellbeing

Tourism New Zealand provides our staff with a work environment that ensures they work safely. 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 different time zones.

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.

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.

Systems and technology

Tourism New Zealand leverages technology to deliver world-class marketing and employee digital platforms. Using 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 focusing on streamlining and optimising the organisation's existing systems. There are two focus areas for ongoing development:

- Improving Tourism New Zealand's security posture considering 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.
- Leveraging the advances in AI technology to drive productivity improvement organisation-wide.

Section six: Subsidiary companies and related entities

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 evaluation systems assess a range of quality criteria including health and safety, environment, 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 star grading, which is common practice in the sector to help guide consumer decision-making. Qualmark also provides support and advice on how tourism businesses can meet and move up the criteria standards.

Qualmark is endorsed by the Global Sustainable Tourism Council. This provides Qualmark with an international endorsement that ensures both members and consumers know that Qualmark certification meets global standards of sustainability. This is particularly important in some trade channels that will only list products which meet defined sustainability criteria.

Qualmark has approximately 2,000 licence holders who are annually assessed against the criteria. Qualmark supported tourism businesses throughout the pandemic by pausing licence fees, which were reintroduced in 2023.

isite

VIN Incorporated (an incorporated society trading as isite New Zealand) is New Zealand’s official visitor information network. With 47 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.




Wainui Beach
Tarāwhiti Gisborne

Tourism New Zealand
+64 4 462 8000



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