



West Coast Tourism Summit

3rd September

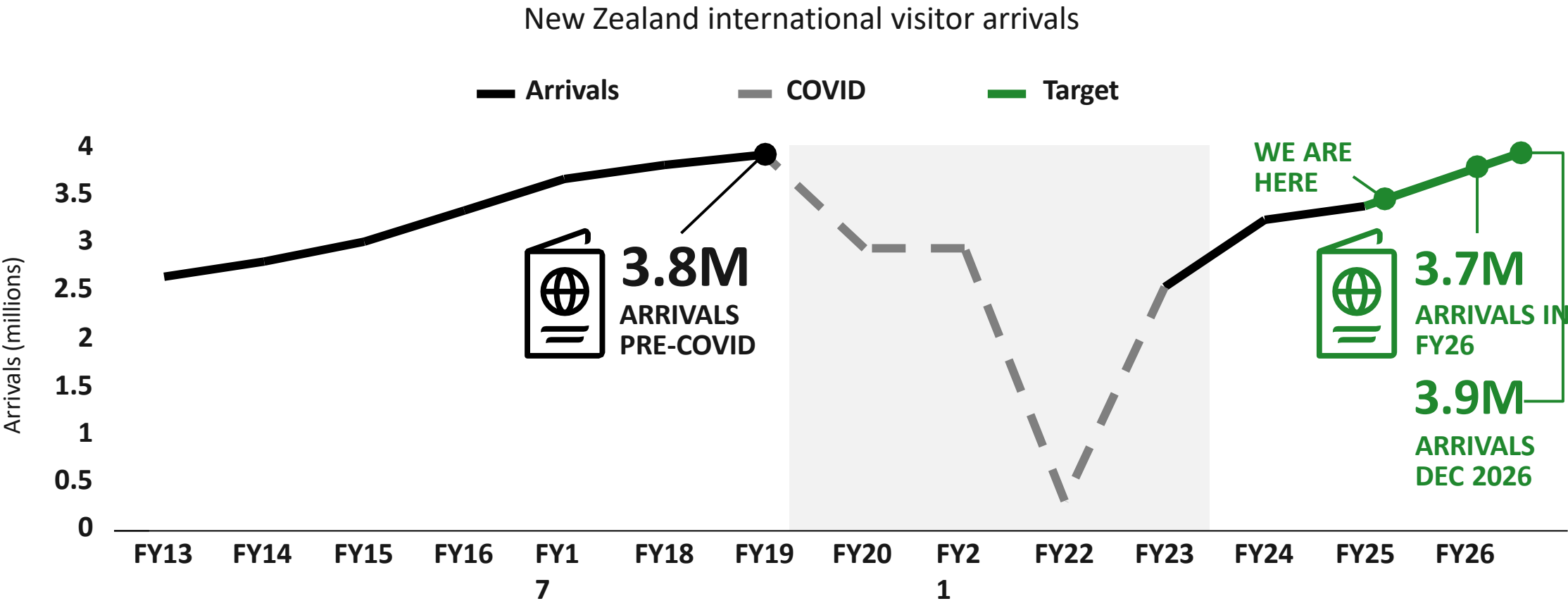
Tourism New Zealand FY26 Growth Aspiration



3.7M
ARRIVALS IN FY26

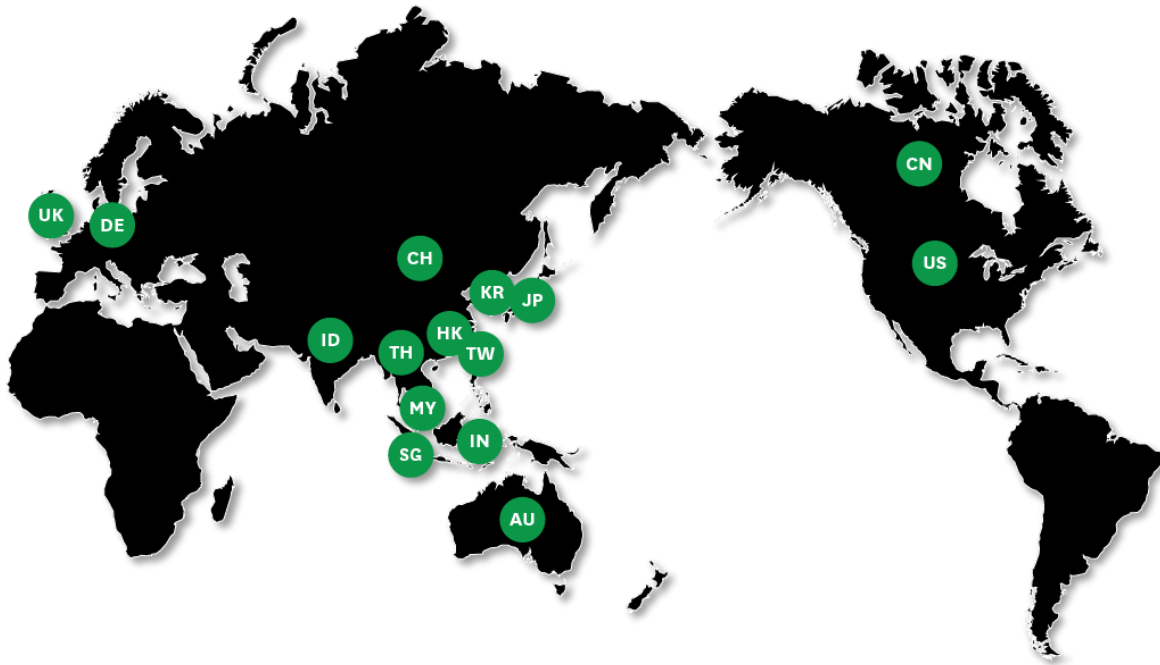
3.9M
ARRIVALS BY DEC 2026

Need 1,000 extra visitors a day to achieve FY26 growth target



Market focus and growth targets

Commercial in confidence



Market	FY26 Target growth rate
Australia	10%
US	6%
Canada	10%
China	25%
Taiwan	5%
Hong Kong	11%
UK	10%
Germany	11%
Japan	10%
Korea	0%
India	10%
Singapore	5%
Thailand	7%
Malaysia	5%
Indonesia	18%
Rest of World	10%
Total	10%

FY26 Business Challenges



Accelerate conversion and arrivals



Increase share of mind and intention to book



Partner with industry for growth

Australia – Market approach



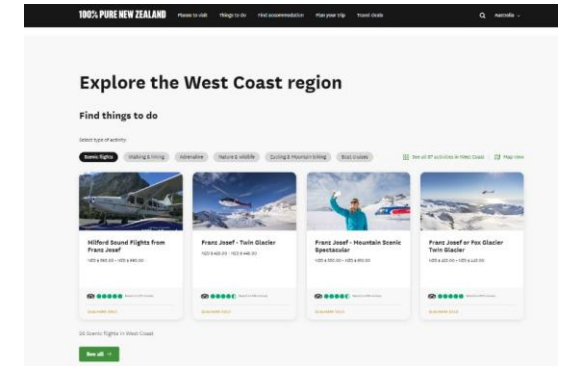
Australian visitor growth lies in overcoming stubborn barriers

- Lack of urgency and compelling triggers to book travel to New Zealand
- Interesting but not motivating destination to travel to now
- Trans-Tasman capacity not recovered with reduced airline competition



Key interventions to drive arrivals

1. Ensure New Zealand is top of mind and a salient destination
2. Full funnel campaigns & trade partnerships to convert arrivals all year around
3. Incentives to drive arrivals at scale



Ways for industry to engage include;

Explore Self-Famil Programme

Accessing Travel trade via;

- Travel Trade Website
- Trade Newsletter – Monthly eDM
- 100% Pure New Zealand Travel Specialists FB group
- Consumer Website / TDB

North America – Market approach



Lack of urgency to book despite all-time high preference

- Opportunity to leverage the strength of the US dollar
- Current shift towards travelling off-peak provides opportunity to grow year-round arrivals
- Key is extending seasonal services to deliver long-term year-round capacity growth

Key Interventions to drive arrivals

- Campaigns to deliver year round arrivals, including capitalising on key commerce moments
- Differentiated experience led proposition by season that drives urgency to book
- Increased reach with conversion partners

Ways for industry to engage include;

- Explore Programme
- Kiwi Link - October
- Circulate news and updates via the Trade content team
- Ensure products and deals loaded on newzealand.com
- Ensure key IBOs/Wholesalers up to date
- Contact TNZ team if visiting market for market update

China – Market approach



Barriers more prevalent

- Lack of urgency to book requires a proposition which incentivises travel
- Diluted share of voice requires an integrated plan to book pathway, with media, trade and e-commerce partners
- Visa requirements and leave availability seeing lost share to short haul, visa friendly destinations

Key Interventions to drive arrivals

- Campaigns connected to commerce moments targeting all seasons with value deals and timebound offers
- Building a new audience through shorter itineraries and/or dual destination
- Addressing key barriers through high impact celebrity reach

Opportunities for industry

Connect on relevant platforms for:

- Travel inspiration
- Travel planning and booking
- Payments

Understanding of Chinese visitor expectations for:

- Dining
- Accommodation
- Getting around
- Sightseeing and Entertainment

Supported by Global Brand activity

