



Tourism New Zealand

From interest to itinerary: building demand and confidence in destination New Zealand

Tourism growth targets

3.7M

Arrivals by June 2026

On track to recover to
2019 arrivals in 2026

3.9M

Arrivals by December 2026

Recover to 2019 international
visitor arrivals

\$14.4B

Tourism exports by June 2027

On track to double the value
of tourism exports by 2034



Omata Estate
Bay of Islands



100% PURE
NEW ZEALAND

Context – the world we are operating in



Persistent volatility



**Consumer behaviour shifts
and AI disruption**



**Balance brand and
conversion in a higher-
cost media environment**



**Maintain social licence as
tourism grows**

Our FY27 Focus Areas



Visitor

Accelerate conversion
and arrivals



Brand

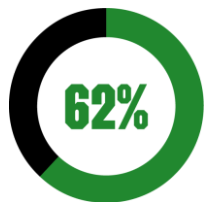
Increase share of mind
and intention to book



Sector

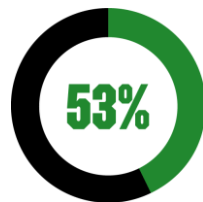
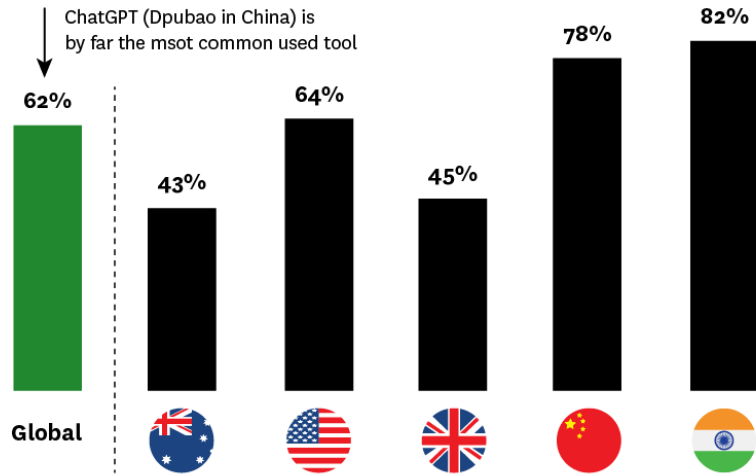
Enable growth
with partners

Making New Zealand easier to discover through AI



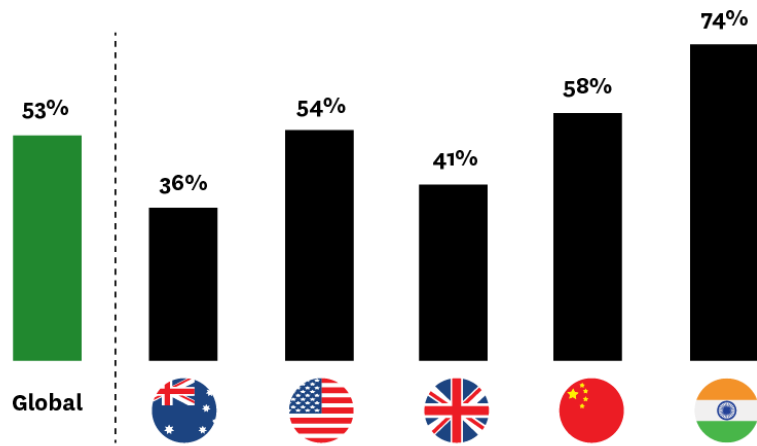
likely to use AI to plan
next trip (global avg)

% Likely to use AI tools to plan next trip



expect to use AI more
for future planning

% Plan to use AI tools more in the future



Base: Total 3753 AU 750, US 750, UK, 750, CH 752, IN 751

Q: How likely are you to use AI-based tools when planning your next holiday / vacation ? % Extremely + Very likely

Q: Do you expect to use AI more or less for future trip planning?

Why cruise is important for New Zealand's visitor economy

- Supports regional dispersal
- Strong economic contribution
- Supports local businesses and communities
- Creates advocacy for destination New Zealand



TNZ's role in the cruise system



Brand

Increase share of mind and intention to book in global audience



Marketing activity

Via trade in North America



Partnership

Enable growth with cruise partners

Positioning New Zealand as the place to visit for food and beverage



**The MICHELIN
Guide partnership**



**World-class
Food & Beverage tourism**



**World-class
produce**

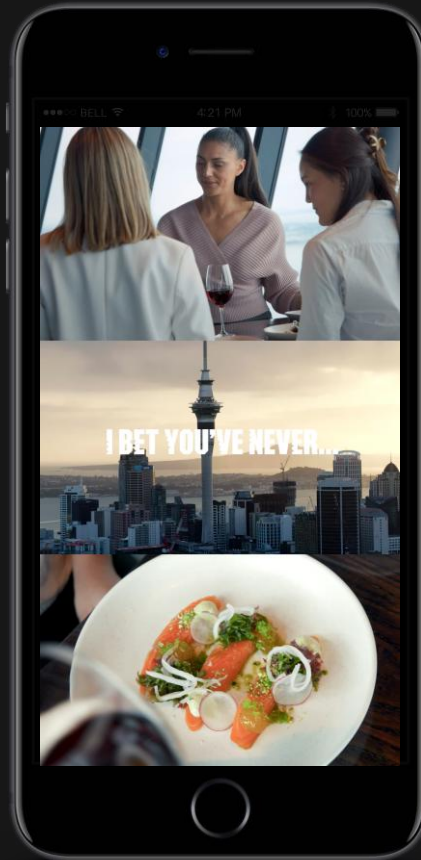
AN INVITATION TO DINNER

*New Zealand is now on the MICHELIN GUIDE
and we're inviting the world to have a seat
at our table.*

**100% PURE
NEW ZEALAND**

**WORTHY OF A
SPECIAL JOURNEY**

An Invitation to Dinner at Orbit Sky City



**100% PURE
NEW ZEALAND**

An Invitation to Dinner at Black Barn



**100% PURE
NEW ZEALAND**

ANY QUESTIONS?



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NEW ZEALAND**