



Tourism New Zealand

BYATA Conference, 17 August 2026

Our role

Market New Zealand as an international visitor destination to maximise the long-term benefit to New Zealand



We help to guide visitors on travelling safely and caring for our home, people and culture.



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



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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**

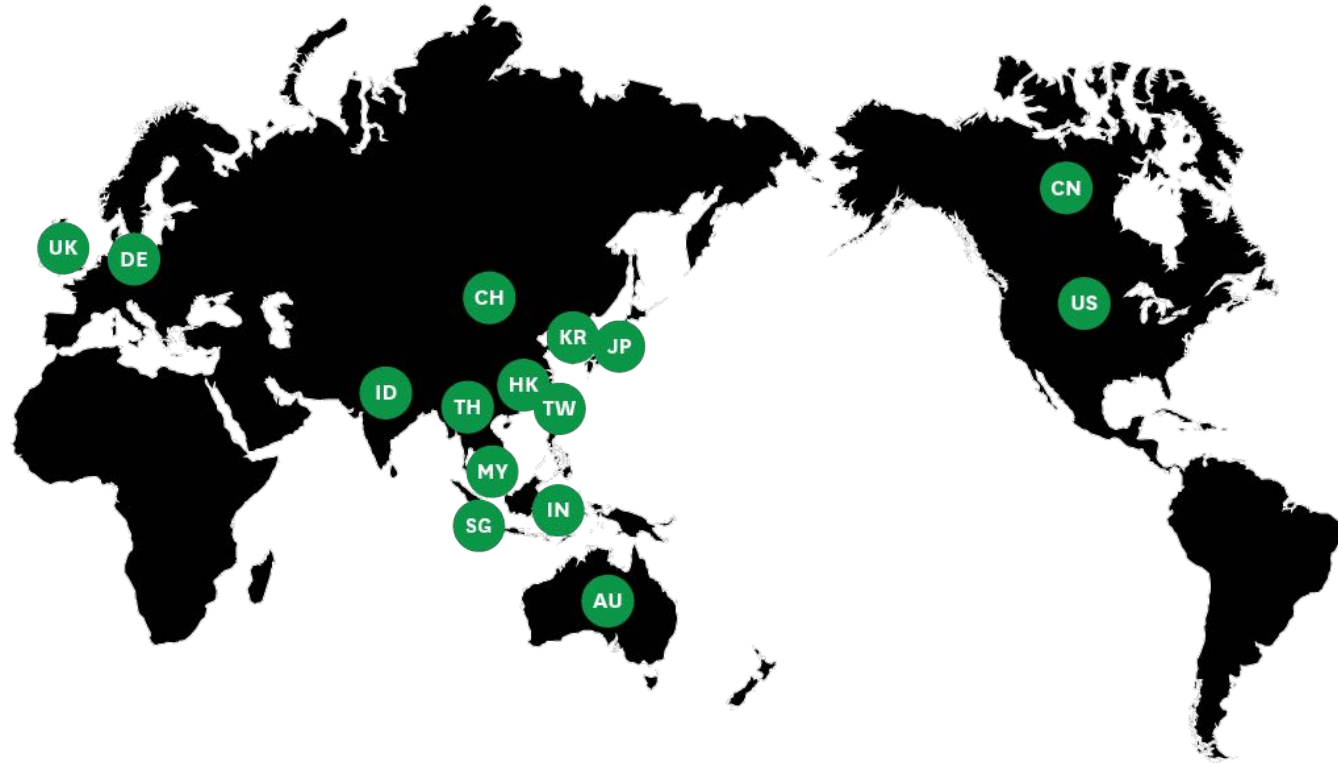


Hump Ridge Track
Fiordland



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Tourism New Zealand Market Focus



Our FY27 Focus Areas



Visitor

Accelerate conversion
and arrivals



Brand

Increase share of mind
and intention to book



Sector

Enable growth
with partners

Food & Beverage

A big opportunity for 2026-2027 alongside themes Active Escapes and Wellness

Why food & beverage?

Food is a key driver of destination choice for Active Considerers in priority markets

- US 85% | China 89% | India 97% | Australia 70%

Strong demand signals

- #1 activity Active Considerers want to do in NZ: trying local cuisine (84% globally)
- 32% cite “to enjoy local food & beverages” as a reason to visit (ranked #8)

Solid foundations

- 61% of Active Considerers already associate NZ with high-quality food & wine

Clear barrier to address

- 28% cite concerns about quality/variety of food & beverages (#6 barrier)

*Kantar: Evaluating the Michelin Guide Partnership Opportunity. March 2025

**ACM January 2026



Multiple opportunities across 3 areas

**Michelin
partnership**



**World-class F&B
tourism**



**World-class
produce**

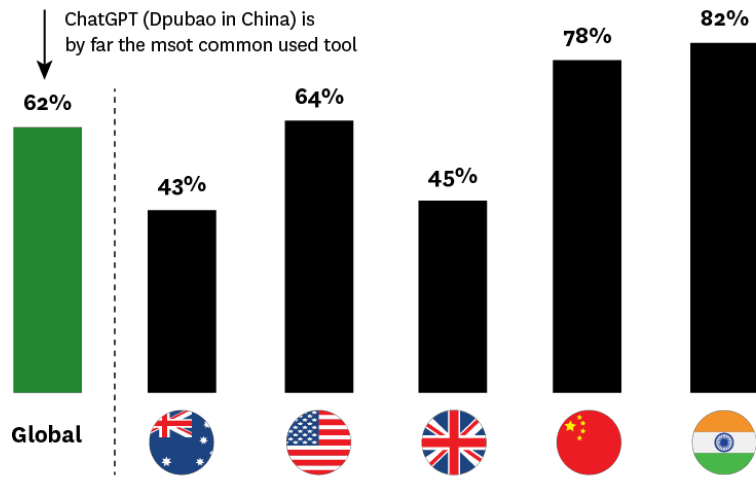


A small pause: AI is becoming a mainstream trip planning channel



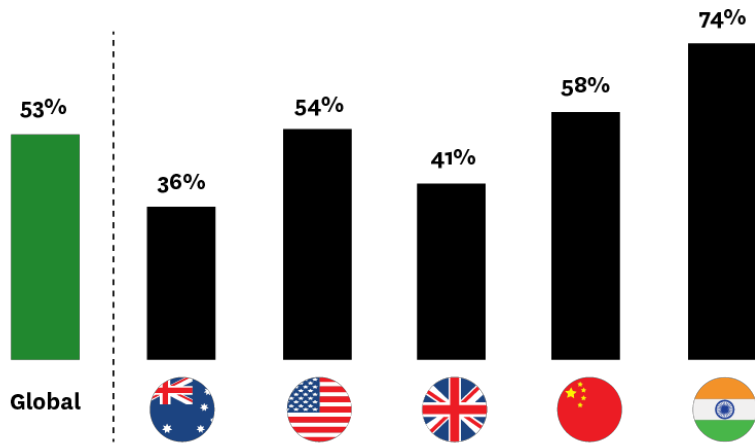
likely to use AI to plan next trip (global avg)

% Likely to use AI tools to plan next trip



expect to use AI more for future planning

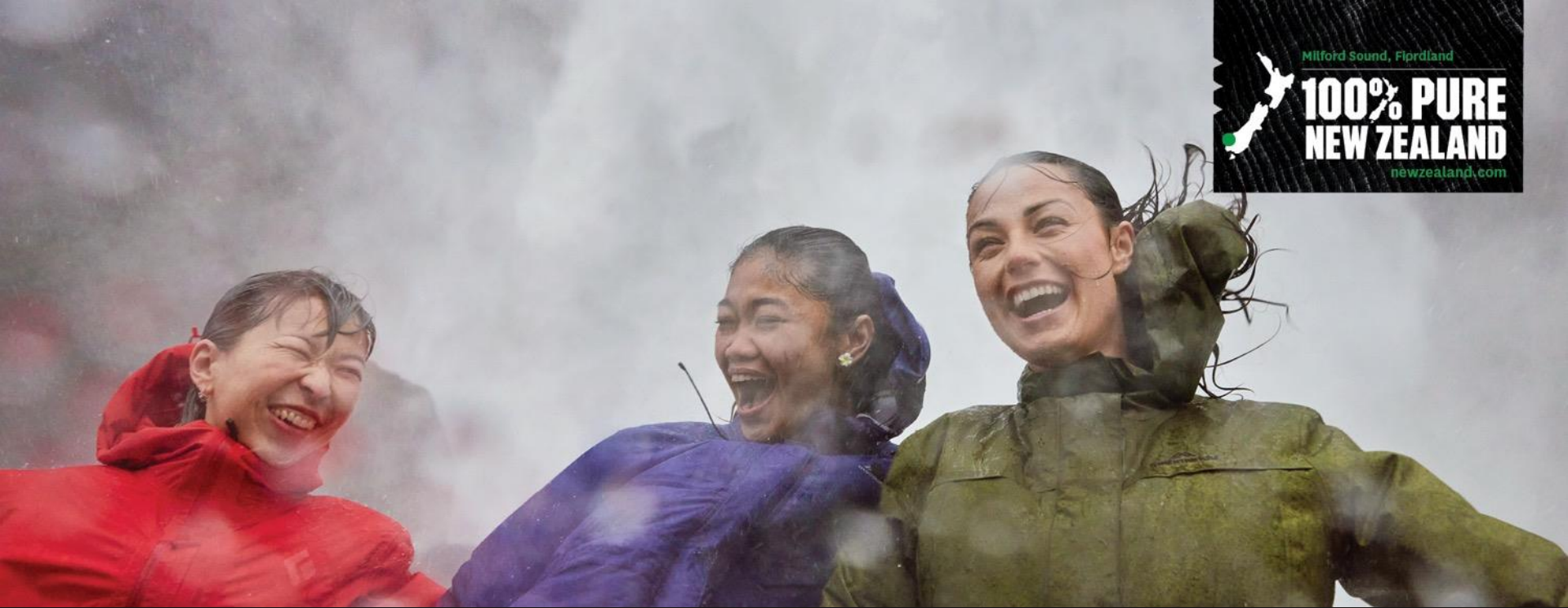
% Plan to use AI tools more in the future



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?



Working Holiday Makers in Australia Q1 2026 BYATA Post Campaign Review

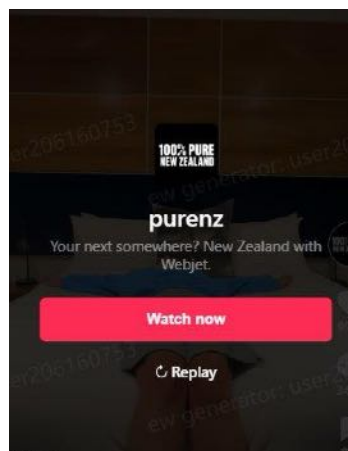
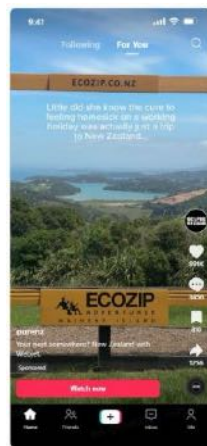
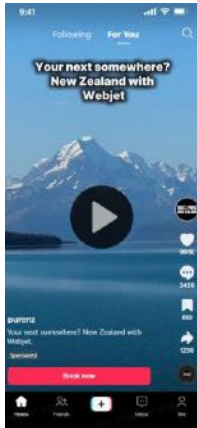
Campaign Overview

- **Strategic approach:**
 - Tourism New Zealand launched a paid media campaign to encourage European Working Holiday Makers in Australia to travel to New Zealand. BYATA worked closely with the project team, providing guidance and insights.
 - This campaign supported Tourism New Zealand's focus on driving arrivals growth in FY26, by targeting a travel-savvy Australian-based segment who are likely to visit Aotearoa New Zealand during or when they complete their working holiday in Australia.
- **Campaign dates:** 9-29 March 2026
- **Travel period:** March - June 2026
- **Ports:** Departing from all AU with a focus on the Eastern Seaboard (NSW, VIC, QLD) to Auckland, Wellington and Christchurch.
- **Target:** +1,035 incremental arrivals to New Zealand

Paid Media

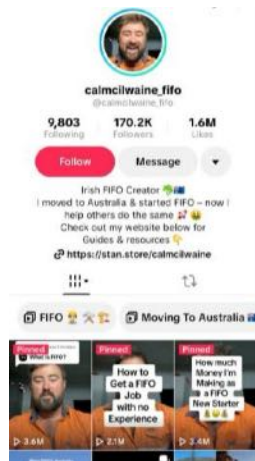
The campaign drove 106,087 referrals in total with 74% of clicks coming from Meta and the remaining 26% from TikTok.

The overall click through rate was 1.55% with a cost per click of \$0.46



Irish KOL: Cal Mcilwaine

https://www.tiktok.com/@calmcilwaine_fifo



Irish: Cal Mcilwaine (& partner)

Full Tour Operator Itinerary here

Dates: 25 - 29th Nov

Slice of home angle: Irish pubs & Guinness

- Mean Doses
- D4 Irish Pub
- Welsh Dragon Bar
- Puku Pies
- The Free House Pub

NZ adventure activities:

- Wharewaka - Waka Ama Experience
- Mt Victoria Lookout
- Wellington Cable Car
- Zealandia
- Weta Workshop

Accommodation:

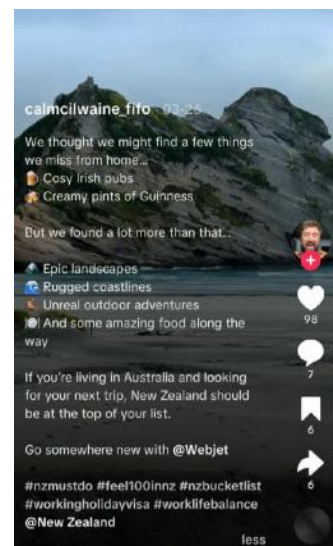
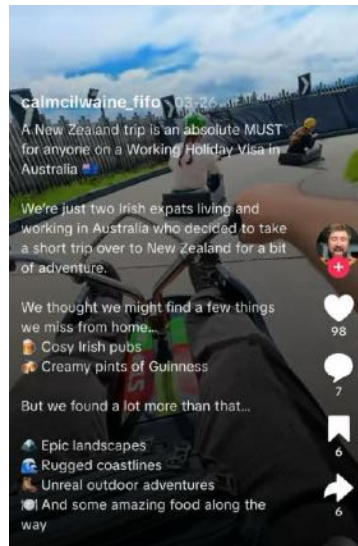
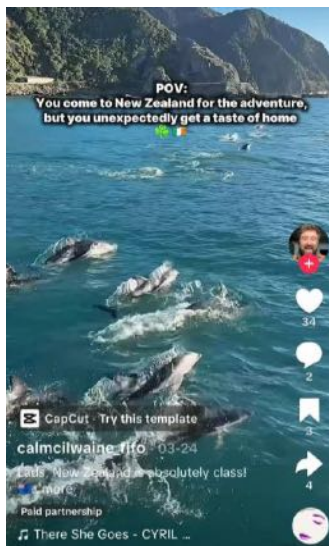
- Haka House Wellington

Meta

- The 30s CAL performed the best in terms of CTR and a cost per landing page view of \$0.33,
- 15s CAL creative drove the highest volume of LPV with a strong cost per of \$0.34

TikTok

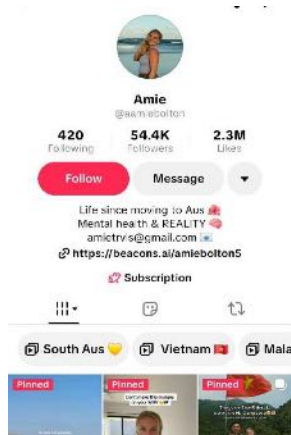
- The 15s CAL had the strongest Cost per landing page view of \$2.09 however at a slightly lower volume than some other creatives.



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UK KOL: Amie Bolton

<https://www.tiktok.com/@aamiebolton>



UK: Amie Bolton
Full itinerary here

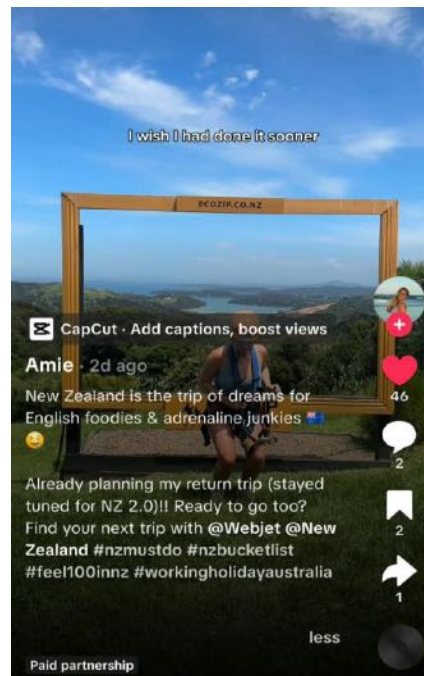
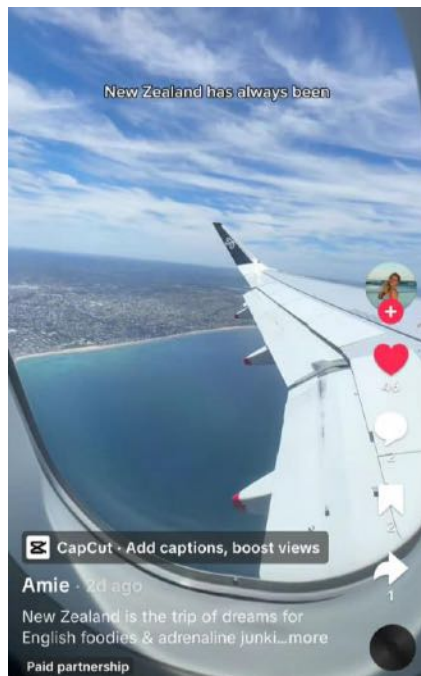
- Dates: 24 – 30th Nov
Slice of home angle: British pubs & roasts
- The Londoner Pub
 - The Green Dragon Inn (Hobbiton)
 - The Pig & Whistle Pub
- NZ adventure activities:**
- Black Water Rafting at Waitomo Caves
 - Hobbiton
 - Rotorua Gondola & Luge
 - Katoa Jetboat
 - Redwoods Tree Walk
 - Hells Gate Geothermal Walk
 - Zorb
 - Secret Spot Spa
 - All Black's Experience
 - Ziplining Waiheke
- Accommodation:**
- Hibben Lakes Hotel Cambridge
 - Ibis Hamilton
 - Haka House Rotorua
 - LyLo Auckland

Meta

- 15s Amy A creative drove the highest volume of LPV with a strong cost per of \$0.34

TikTok

- While the Amy A creative received the highest volume of PV, it saw a strong drop off rate with only 36% of people clicking on the ad, landing on the LP.

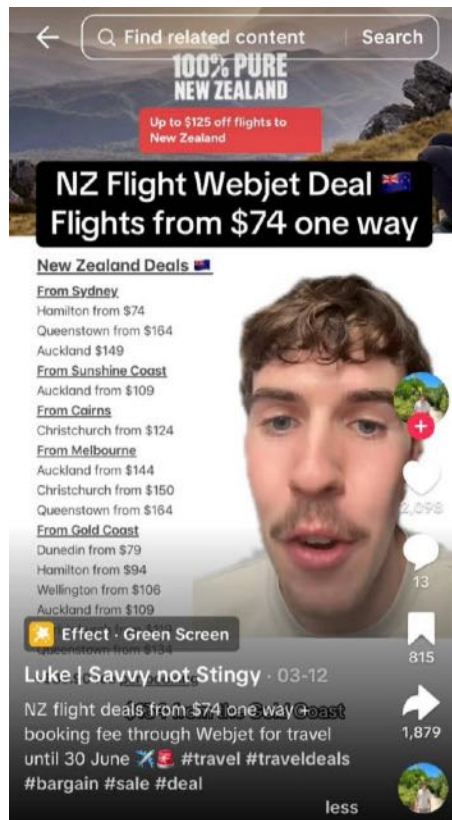
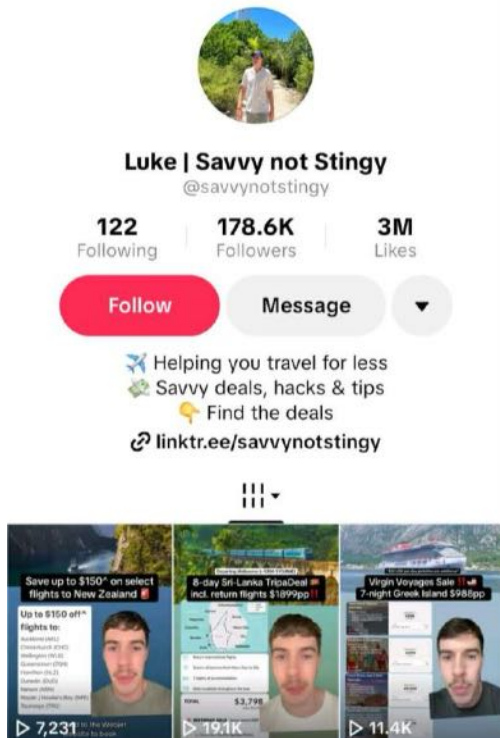


NEW ZEALAND

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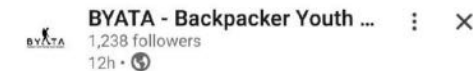
KOL (organic): Luke Savvy Not Stingy

<https://www.tiktok.com/@savvynotstingy>



BYATA support

- Member eDM
- LinkedIn post



Tourism New Zealand Campaign Update - LETS GET BEHIND THIS! 🇳🇿

Tourism New Zealand is launching a paid media campaign to encourage European Working Holiday Makers in Australia to travel to New Zealand. **BYATA - Backpacker Youth and Adventure Tourism Association** has been working closely with the project team, providing guidance and insights, and we're encouraged to see more initiatives of this kind being brought to market.

This campaign supports Tourism New Zealand's focus on driving arrivals growth in FY26, by targeting a travel-savvy Australian-based segment who are likely to visit Aotearoa New Zealand during or when they complete their working holiday in Australia.

You'll find full details below, including ways you can get involved and support the campaign.

🗣️ Campaign: Come for a slice of home, stay for the adventure in New Zealand

📌 Strategic approach:

Tourism New Zealand is partnering with **Webjet.com.au** on a conversion campaign promoting New Zealand as a desirable and preferred holiday destination for the WHV audience in Australia (18–35-year-olds who have lived in the UK or Ireland).

Tourism New Zealand Campaign Update



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Campaign: Come for a slice of home, stay for the adventure in New Zealand
Strategic approach:

- Tourism New Zealand is partnering with Webjet AU on a conversion campaign promoting New Zealand as a desirable and preferred holiday destination for the WHV audience in Australia (18–35-year-olds who have lived in the UK or Ireland).
- There's a focus on driving leisure arrivals into key New Zealand gateway destinations across both North and South Islands.
- The campaign aims to drive incremental growth in leisure visitation into New Zealand.
- The campaign leverages influencer content and TikTok and Meta trends to bring to life "Come for a slice of home, but stay for the adventure," using homesick itineraries to extend reach and engagement with younger, experience-led audiences and drive traffic to webjet.com.au

Campaign dates: 9-29 March 2026

Travel period: March - June 2026

Ports: Departing from all AU, with a focus on the Eastern Seaboard (NSW, VIC, QLD) to Auckland, Wellington and Christchurch.



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Golden Bay
Nelson Tasman

Youth Holiday Visitation Insights Update

BYATA Conference August 2026



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News flash!

Released last Friday....

June 2026

International Visitor Arrivals



Year ending June 2026:

3.7M arrivals, up +9% (+299K) YoY

94% recovered vs calendar year 2019



June 2026 monthly:

201K arrivals, up 15K on June 2025

95% recovered vs June 2019



Arrivals from Australia were a record
for any year and United States arrivals
were record for a June year

Key Youth Traveller Insights Summary

Youth travellers represent the largest share of all arrivals (28%)—and their value extends well beyond visitor numbers

Youth and backpacker travellers are helping New Zealand's tourism recovery. Holiday arrivals among 18–34-year-olds have recovered to 96% of 2019 levels, with 577,000 arrivals in the year ending May 2026

Youth travellers deliver significant economic value, contributing \$2.2 billion to the economy last year, up 4% year-on-year, with an average trip spend of \$4,500

They stay longer (+3 days), travel more widely and visit more regions, while participating in a broader range of experiences than the average holiday visitor

Youth travel supports regional dispersal. Backpackers are especially likely to explore both islands, visit four or more regions, and use a wide mix of accommodation and transport

Future youth travellers are seeking a mix of nature, adventure, relaxation and authentic experiences - These span beautiful landscapes and local food to cultural discovery and opportunities to escape the everyday.

Sources:

Stats NZ International Arrivals YE May 2026 | *Recovery calculated against calendar year 2019

MBIE, International Visitor Survey | YE March 2026 |

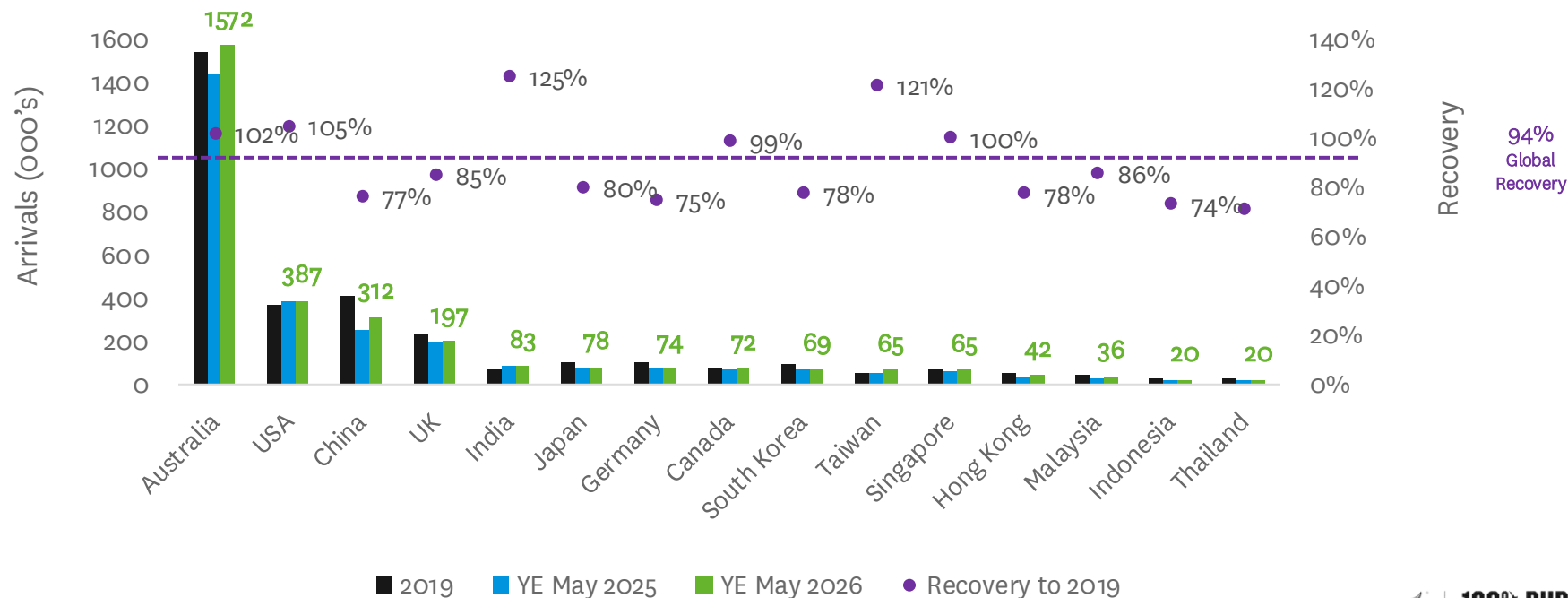
* Youth Travellers = Holiday Visitors 18-34 y/o

**Backpackers = Holiday Visitors 18-34 y/o who stayed at a backpacker or youth hostel

TNZ Active Considerer Monitor – June 2026 (6 Months Average)

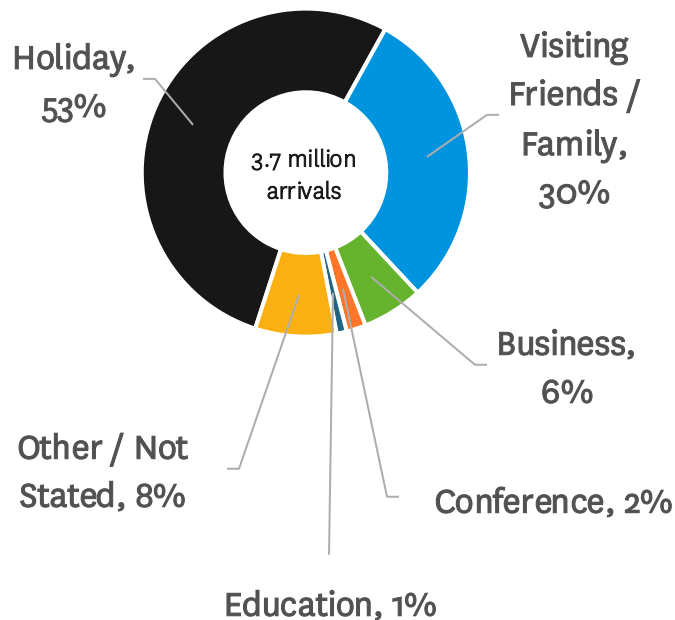
International arrivals recovery is close to pre-pandemic levels (94%), led by Australia which contributes 43% of total arrivals

3.7 million arrivals in the year to May 2026 — up 8.5% year on year, 94% global recovery

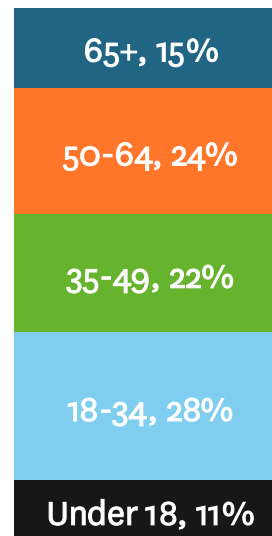


Holiday travel (53%) continues to drive inbound tourism, while visitors aged 18-34 account for more than a quarter (28%) of all arrivals

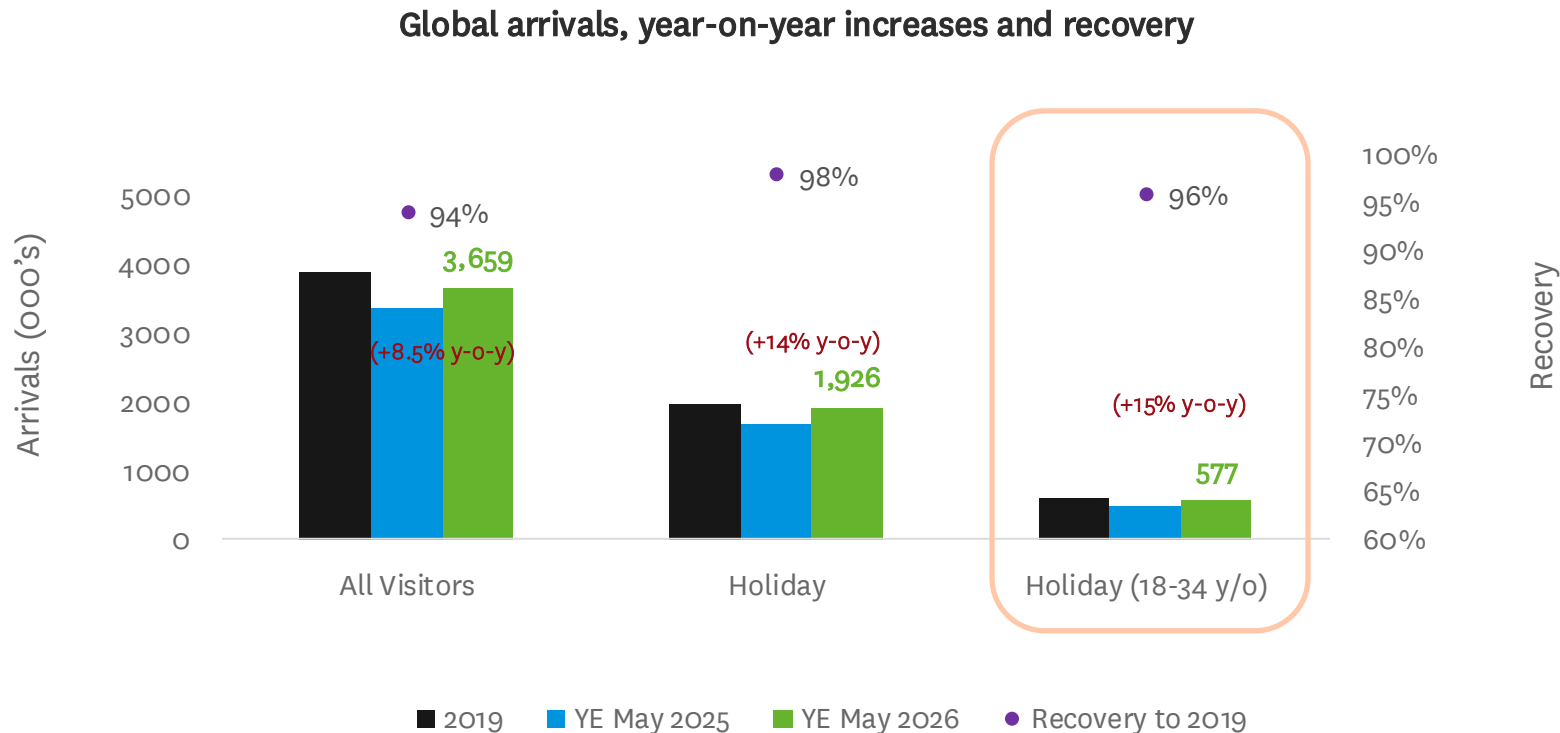
Breakdown of Visitor Purpose



Arrivals Share by Age

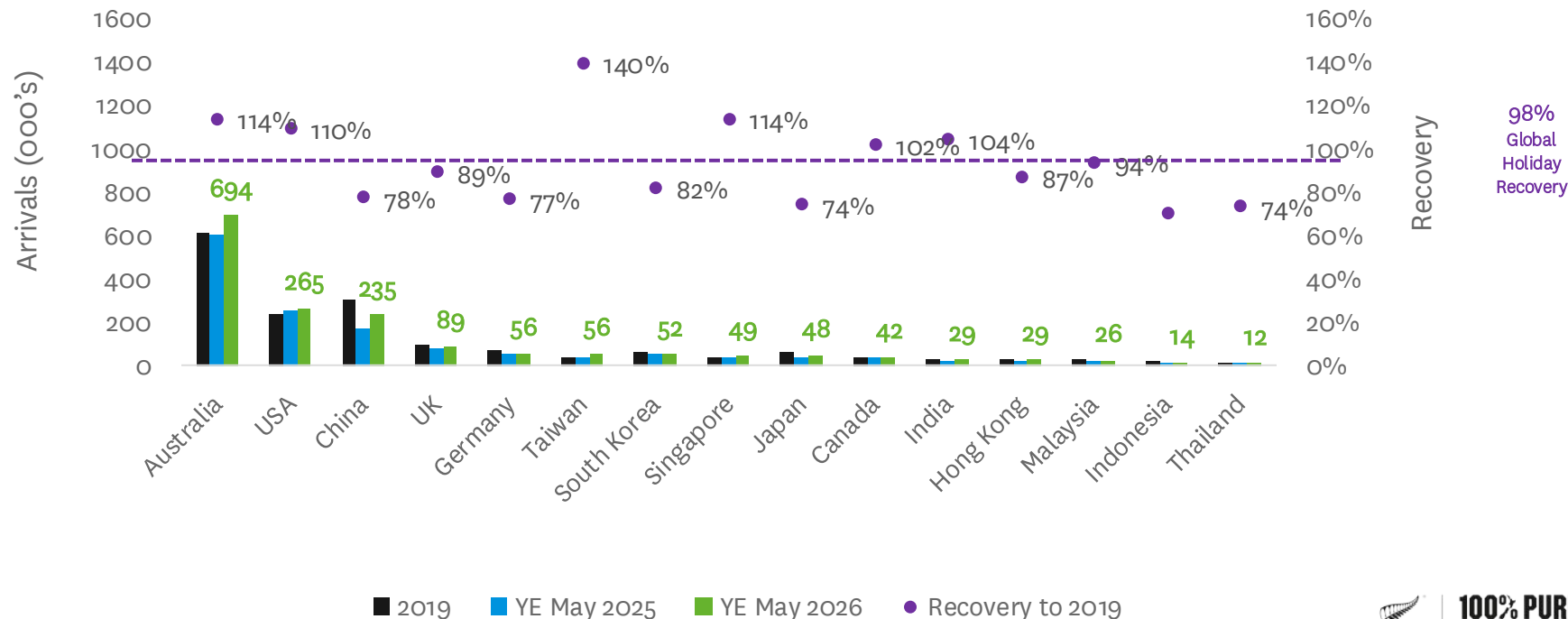


Youth arrivals continue to lead the recovery, increasing 15% year-on-year and reaching 96% of 2019 levels



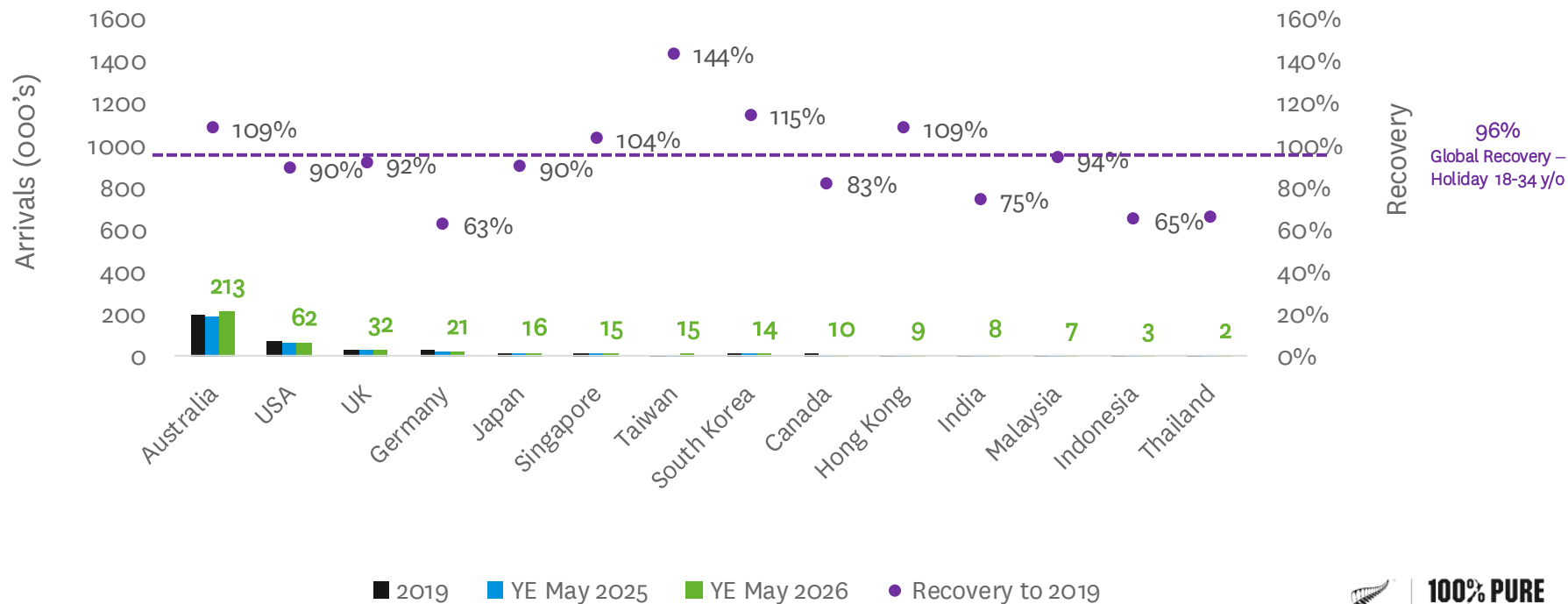
Australia accounts for 36% of holiday arrivals, followed by the USA (14%), China (12%), and the UK (5%)

1.9 Million holiday arrivals in the year to May 2026 — up 14% year on year, 98% global recovery



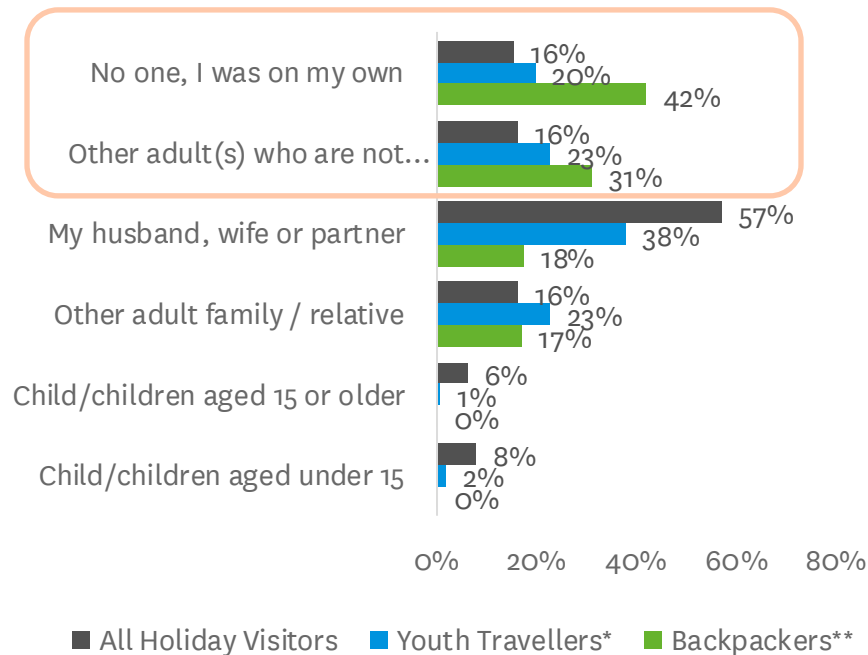
Australia represents 37% of holiday 18-34 y/o arrivals, followed by China (14%), USA (11%), the UK (5%) and Germany (4%)

577,000 holiday arrivals 18-34 y/o in the year to May 2026 — up 15% year on year, 96% global recovery

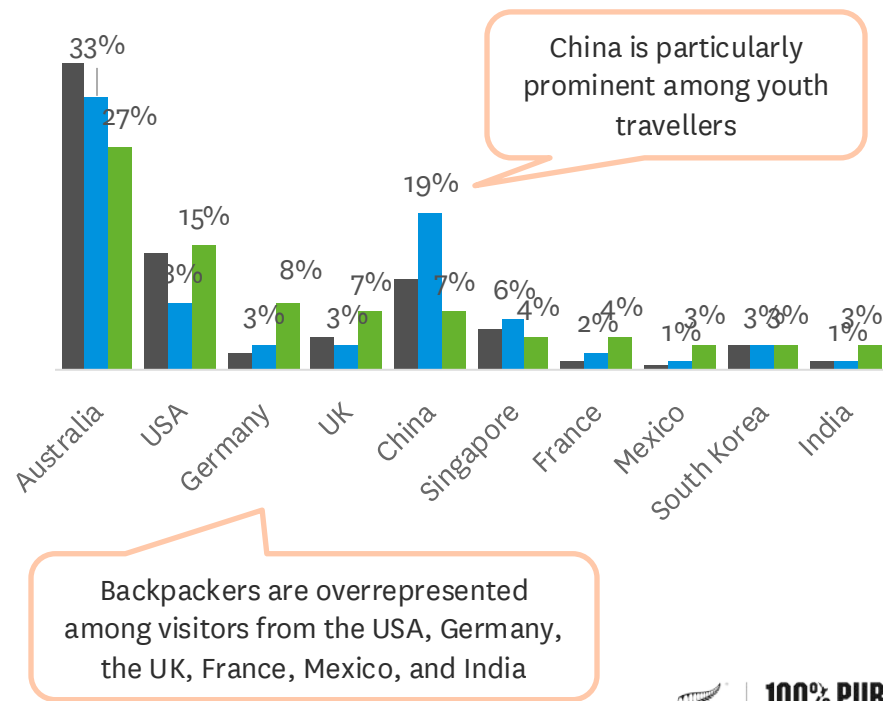


Most youth travellers travelled independently or with other adults, with Australia accounting for the largest share of holiday visitors

Travel Party



Country of Residency

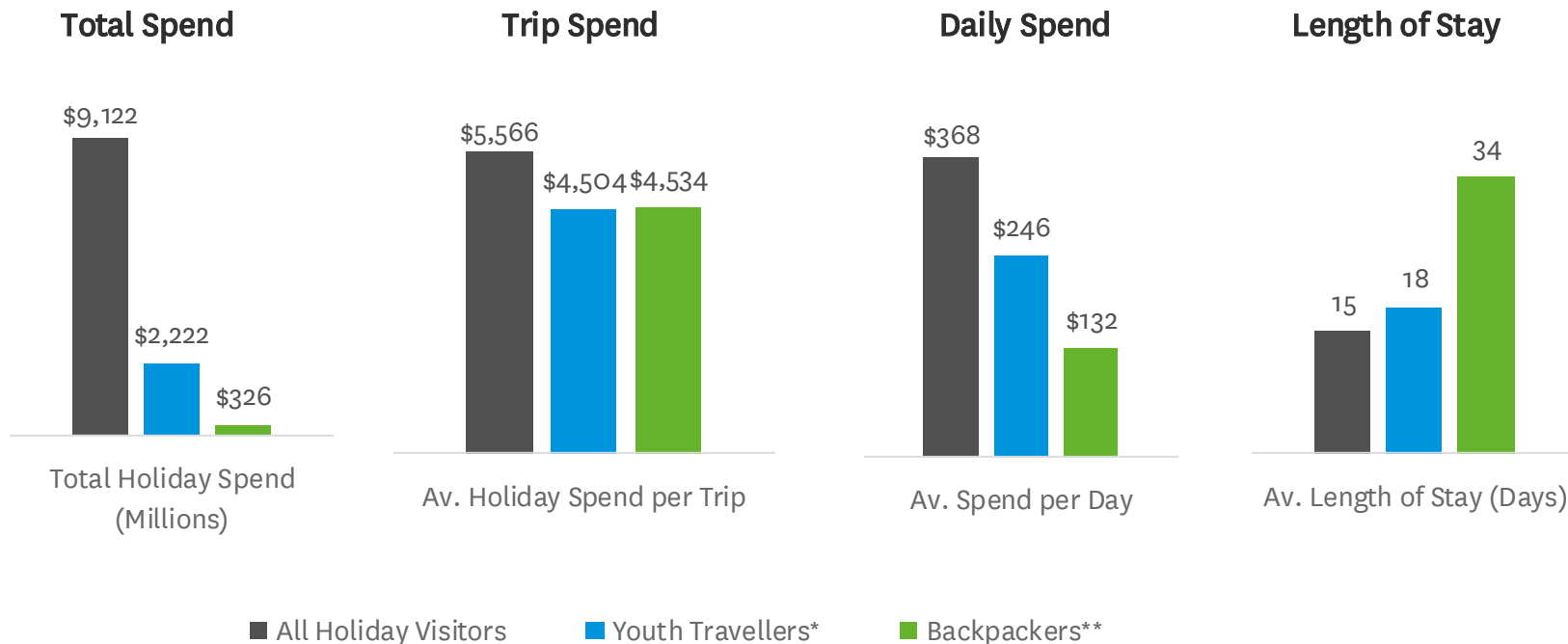


Source: MBIE, International Visitor Survey | YE March 2026 |

* Youth Travellers = Holiday Visitors 18-34 y/o

**Backpackers = Holiday Visitors 18-34 y/o who stayed at a backpacker or youth hostel

Backpackers stay almost twice as long, generating similar trip spend despite lower daily expenditure



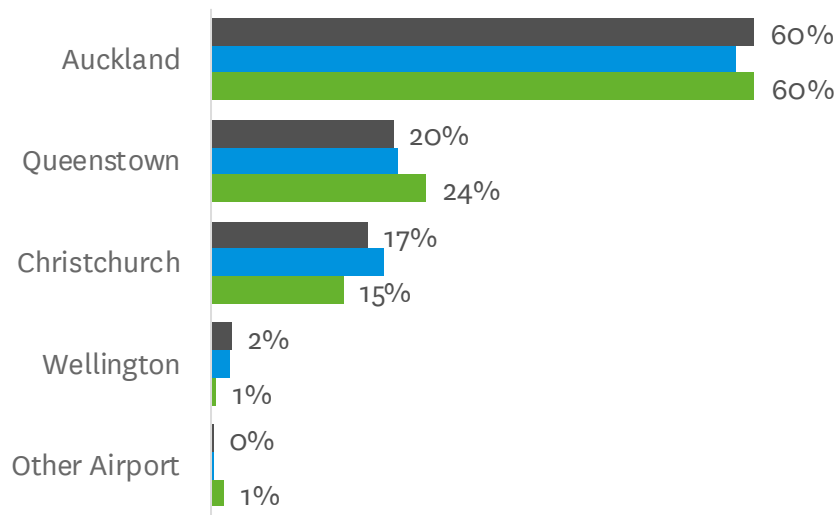
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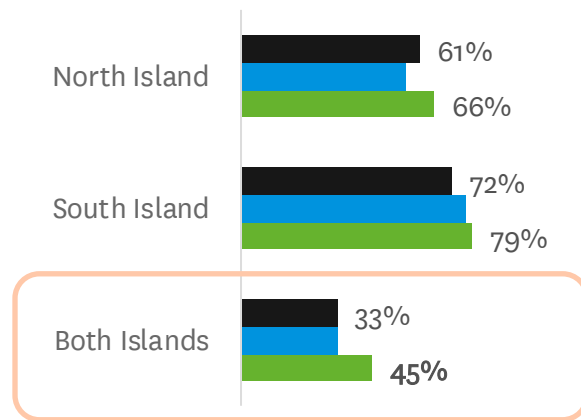
**Backpackers = Holiday Visitors 18-34 y/o who stayed at a backpacker or youth hostel

Backpackers are significantly more likely to visit both islands, supporting nationwide dispersal

Auckland is the main gateway to New Zealand



Island Visitation



■ All Holiday Visitors

■ Youth Travellers*

■ Backpackers**

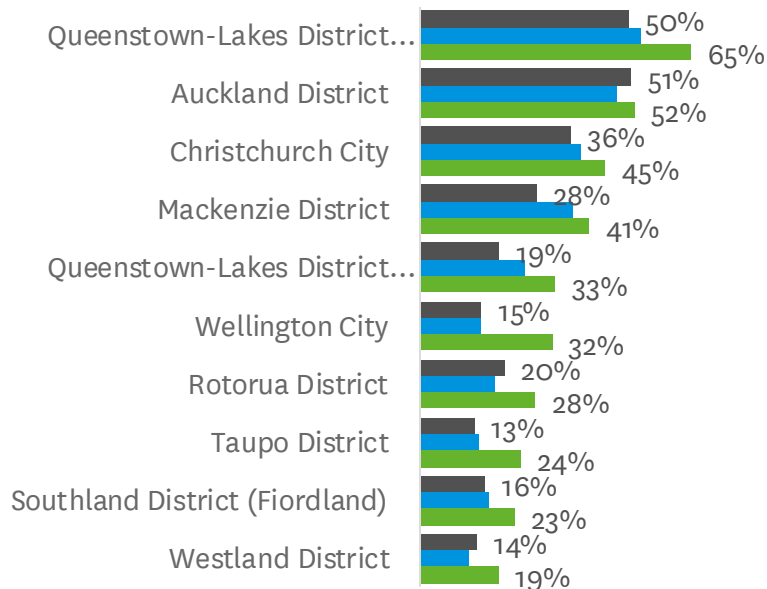
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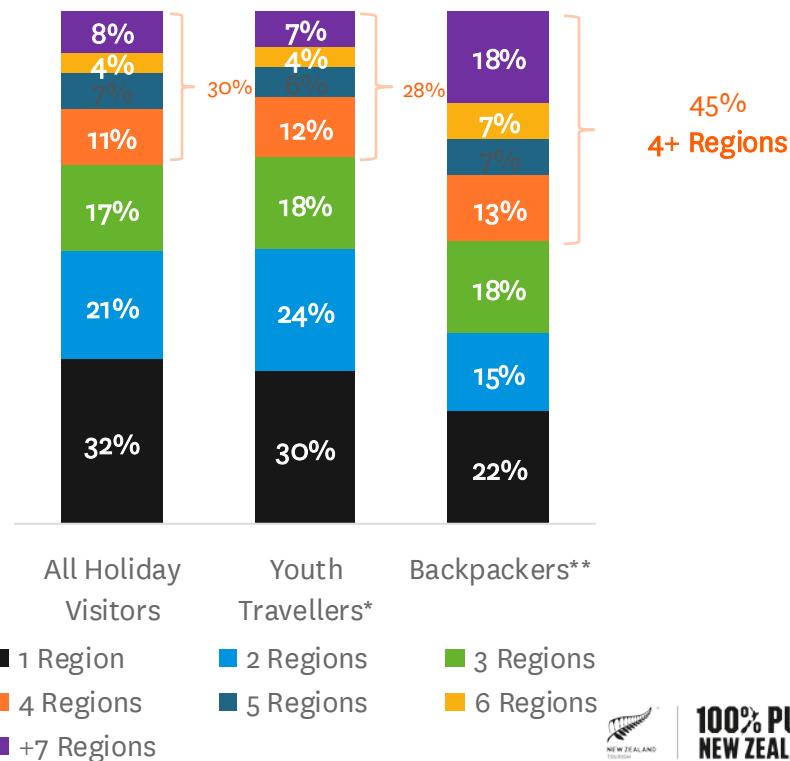
Nearly half of backpackers visit four or more regions, making them one of New Zealand's most geographically dispersed visitor groups

Where visitors stayed



■ All Holiday Visitors ■ Youth Travellers* ■ Backpackers**

Number of Regions Visited



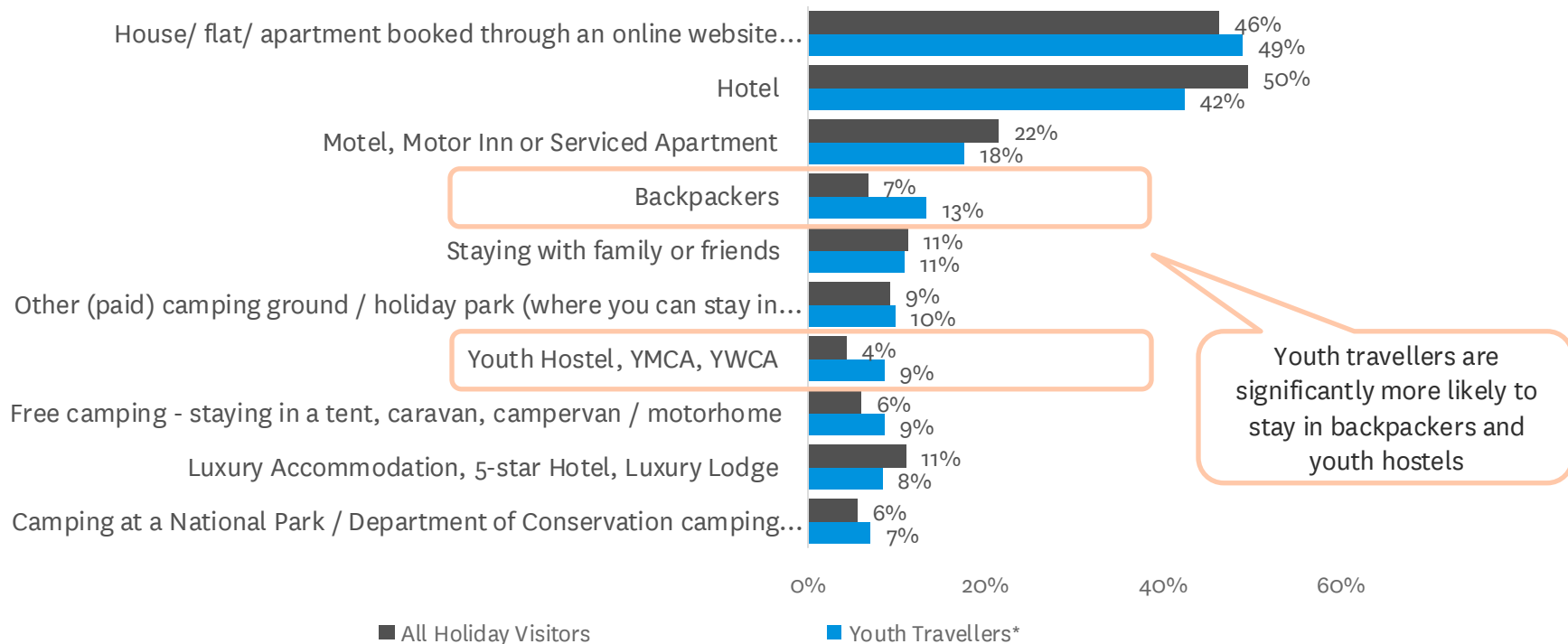
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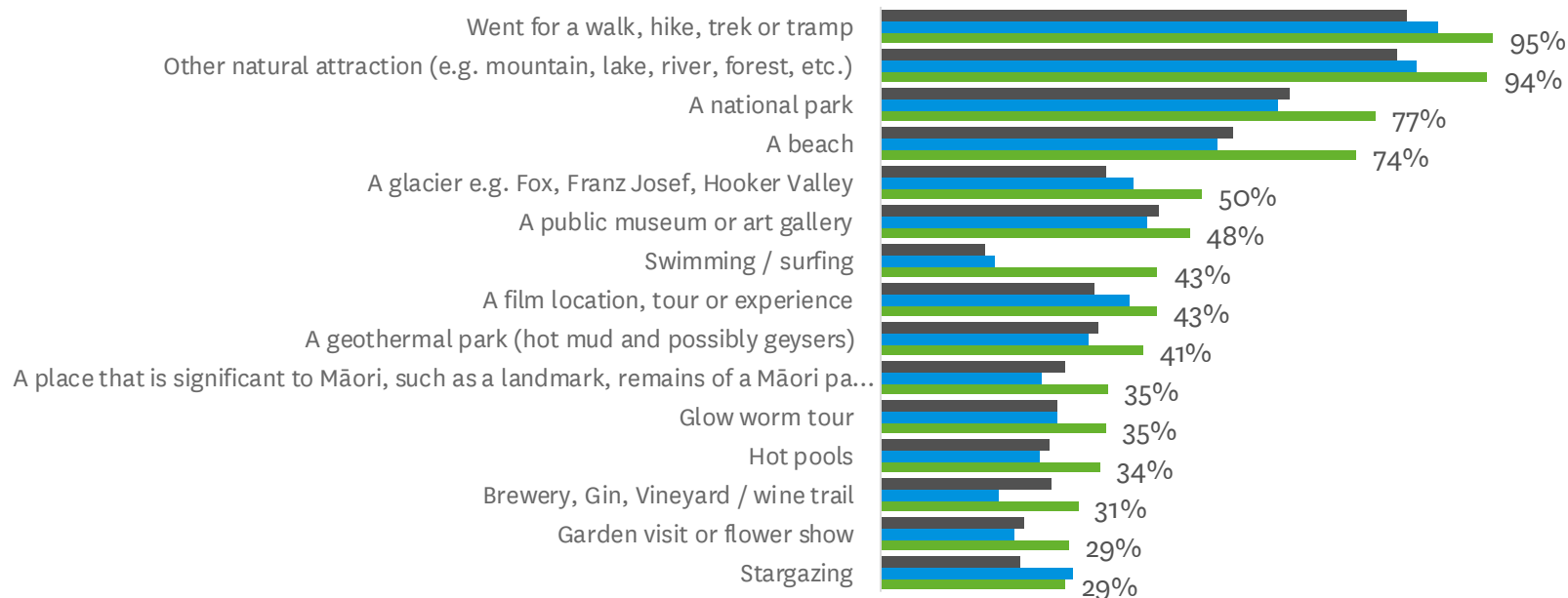
Youth travellers combine conventional accommodation with lower-cost and more flexible options

Accommodation Preferences



Nature-based activities lead for youth travellers, alongside museums, film locations and Māori cultural places. Stargazing is a particular favourite

Activities Undertaken



■ All Holiday Visitors

■ Youth Travellers*

■ Backpackers**

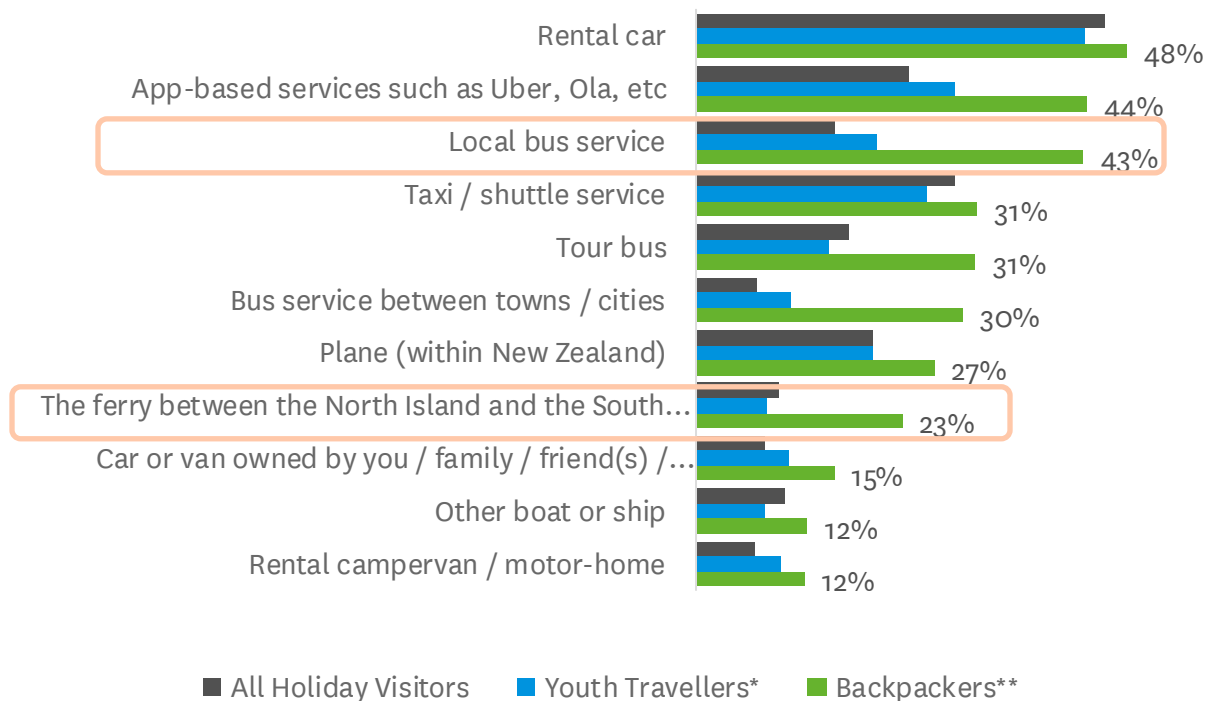
Source: MBIE, International Visitor Survey | YE March 2026 |

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Youth travellers and backpackers rely on a diverse transport mix, combining rental cars with rideshare, buses, taxis, and other transport options

Transport Usage



Source: MBIE, International Visitor Survey | YE March 2026 |

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Future Visitors - Youth

Tourism New Zealand's marketing audiences are 'Active Considerers' – people who are highly interested in visiting New Zealand and are realistically planning a trip within the next three years

Reasons to visit are similar across age groups amongst Active Considerers, led by landscapes and scenery, relaxation, nature, and fun

What Motivates Future Visitors – By Age

Why do you want to visit New Zealand for a holiday?	18 - 34	35 - 49	50 - 64	65 - 74	Global
To experience beautiful Landscapes/scenery	1	1	1	1	51%
To feel relaxed and refreshed	3	2	2	3	43%
To have fun & enjoy myself	2	4	4	7	41%
To get in touch with nature	4	3	3	2	41%
To learn & explore new things	5	6	6	4	37%
To take a break from the routine, stresses and pressures of everyday life	6	5	5	8	37%
To enjoy local food and beverages	7	7	7	5	35%
To feel a sense of adventure	8	8	8	9	33%
To interact with people of a different culture or lifestyle	9	9	9	6	32%
To create lasting memories through photography	10	10	10	11	28%

Top reasons to visit consistent, with landscapes & scenery leading. Chinese, German, and Japanese Active Considerers have a stronger affinity for nature

What Motivates Future Visitors – By Country of Residency

Why do you want to visit New Zealand for a holiday?	Australia	China	Germany	India	Japan	Singapore	UK	USA	Global
To experience beautiful Landscapes/scenery	1	4	1	1	1	1	1	1	51%
To feel relaxed and refreshed	3	2	5	5	3	2	4	4	43%
To have fun & enjoy myself	2	5	10	2	6	5	3	2	41%
To get in touch with nature	8	1	2	9	2	3	7	9	41%
To learn & explore new things	4	6	3	4	11	6	2	3	37%
To take a break from the routine, stresses and pressures of everyday life	7	8	4	3	8	4	6	5	37%
To enjoy local food and beverages	6	3	8	8	4	7	9	7	35%
To feel a sense of adventure	5	12	6	6	9	8	5	8	33%
To interact with people of a different culture or lifestyle	10	10	7	7	7	9	8	6	32%
To create lasting memories through photography	9	7	11	10	10	11	10	10	28%

Chinese Active Considerers place greater importance on experiencing local food and beverages

The need for more research to do about NZ is a key barrier for 18–34s, but also includes other groups, such as 35–49s and 65–74s

Barriers to Booking – By Age

What is stopping you from making a booking?	18 - 34	35 - 49	50 - 64	65 - 74	Global
I am still deciding on what time of year I want to travel	4	1	1	1	29%
I have more research to do about New Zealand as a holiday destination	1	2	5	2	29%
Waiting to accrue enough annual leave	2	4	3	9	26%
Waiting for a good package deal on flights and accommodation	5	3	4	3	24%
Waiting for a deal on flights	6	5	2	4	23%
Waiting for the right life circumstances to travel	3	6	6	7	22%
Do not have enough time to experience it properly	7	7	11	6	12%
It's too expensive to travel to New Zealand	10	9	7	5	11%
New Zealand is too far away / the flight is too long	9	8	12	8	11%
Visa process is confusing / difficult	8	10	9	12	10%

Waiting for the right life circumstances is particularly relevant for younger travellers, making it an important conversion nudge for this group

Conversion nudges differ by market, but information gaps are a common barrier

Barriers to Booking – By Country of Residency

What is stopping you from making a booking?	Australia	China	Germany	India	Japan	Singapore	UK	USA	Global
I am still deciding on what time of year I want to travel	1	3	2	6	4	1	1	2	29%
I have more research to do about New Zealand as a holiday destination	2	1	3	2	2	3	7	1	29%
Waiting to accrue enough annual leave	6	2	10	5	1	6	2	5	26%
Waiting for a good package deal on flights and accommodation	3	6	5	4	9	2	3	3	24%
Waiting for a deal on flights	4	10	1	3	8	4	5	4	23%
Waiting for the right life circumstances to travel	5	9	4	1	6	5	4	6	22%
Do not have enough time to experience it properly	9	7	11	9	3	12	9	10	12%
It's too expensive to travel to New Zealand	8	11	7	10	7	7	11	11	11%
New Zealand is too far away / the flight is too long	12	8	8	8	5	9		12	11%
Visa process is confusing / difficult	10	5	9	7	11	11	8	9	10%

Youth travellers need reassurance on when to visit and easiness to get around, with quality and variety of F&B more important to them than other groups

Knowledge Gaps – By Age

What are some of the concerns you have about choosing New Zealand for your next holiday?	18 - 34	35 - 49	50 - 64	65 - 74	Global
How easy it is to travel around	2	1	1	2	33%
What the best time of year is to do the activities I want to	1	3	5	3	32%
What the weather is like	6	2	3	6	30%
The length of time required to fly to New Zealand	10	5	2	1	30%
How welcoming the locals are	4	6	4	11	29%
How long it takes to travel between the main attractions	5	4	7	5	29%
The quality and variety of food and beverage options	3	7	9	10	28%
How safe it is from crime	11	8	6	7	27%
What / where the recommended things to see and do are	8	11	10	8	26%
How safe it is to participate in adventure activities	7	9	11	13	26%

Knowledge gaps vary by market, with ease of travelling around NZ a key information need for several – particularly in Australia, China and Singapore

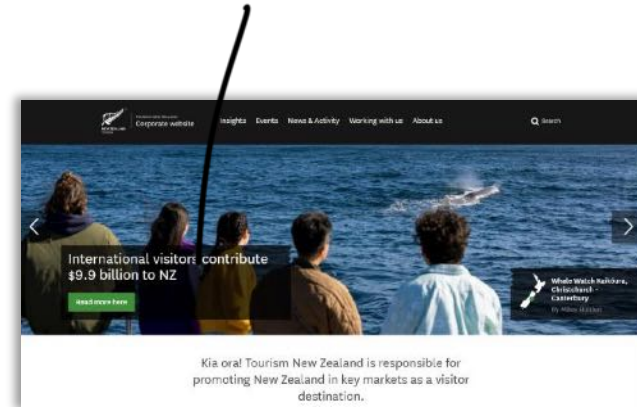
Knowledge Gaps – By Country of Residency

What are some of the concerns you have about choosing New Zealand for your next holiday?	Australia	China	Germany	India	Japan	Singapore	UK	USA	Global
How easy it is to travel around	1	1	9	5	2	1	3	4	33%
What the best time of year is to do the activities I want to	3	6	3	2	7	3	2	3	32%
What the weather is like	2	10	2	11	4	4	4	2	30%
The length of time required to fly to New Zealand	10	14	1	6	9	7	1	1	30%
How welcoming the locals are	8	3	4	8	3	5	5	6	29%
How long it takes to travel between the main attractions	5	7	5	1	8	2	6	8	29%
The quality and variety of food and beverage options	9	4	8	4	5	6	8	7	28%
How safe it is from crime	6	5	16	15	1	11	7	5	27%
What / where the recommended things to see and do are	4	8	12	9	6	9	13	10	26%
How safe it is to participate in adventure activities	11	2	6	3	12	8	12	9	26%

Safety from crime is a more important consideration for Japanese Active Considerers

Useful Links

- Browse our website: [tourismnewzealand.com](https://www.tourismnewzealand.com)
- Browse our latest opportunities: <https://www.tourismnewzealand.com/work-with-us/marketing-activity/>
- Become Qualmark accredited: <https://www.qualmark.co.nz/>
- Share the Tiaki promise: <https://www.tourismnewzealand.com/work-with-us/tiaki/>
- Connect with your local iSite: <https://www.tourismnewzealand.com/work-with-us/isite-new-zealand/>
- Join the Tourism Business Database to receive commission free referrals to your website: <https://www.newzealand.com/nz/tourism-business-database/>
- Review our Insights & Research Hub: <https://www.tourismnewzealand.com/insights/>
- Keep up to date with Tourism news: <https://www.tourismnewzealand.com/news-and-activity/>
- Register for our Newsletter: <https://www.tourismnewzealand.com/contact-us/newsletter-sign-up>
- Register for our upcoming events: <https://www.tourismnewzealand.com/events/>
- Follow us on LinkedIn: [Tourism New Zealand LinkedIn](#), [Tourism New Zealand Travel Trade LinkedIn](#)
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