Destination Queenstown and Lake Wānaka Tourism TNZ SEA Roadshow Report

July 2025

1. Overview

Across four markets, over 400 frontline agents from Singapore, Malaysia, Indonia and Thailand, participated in training sessions, while more than 250 product managers, MICE specialists, and business leaders attended the in-market networking events. A live-streamed training session was hosted on the SEA Trade Facebook group to reach buyers unable to attend in person.

The event successfully reinforced New Zealand's positioning as a year-round, experience-led destination, and provided insights into the evolving landscape of Southeast Asian travel behaviour.

2. Market Background

Singapore

- Arrivals: 57,924 visitors in the 12 months ending May 2025, a 89.7% recovery vs. 2019.
  Travel Patterns: 75% travelled during off-peak periods.
- Key Trends:
  Resilient travel intent despite economic headwinds (0–2% growth forecast for 2025).
  Increasingly cautious spending; travellers prioritising social-worthy, bundled experiences.
  Planning further ahead; school holidays and long weekends remain top travel periods.
  Rise of influencer-run travel agencies (e.g. SoTravel), peer-led storytelling, and Red Note platform popularity.
- Singaporeans travel to New Zealand to experience unique landscapes and culture, connect with nature, and feel refreshed and relaxed. Traditional peak travel seasons in Singapore are Chinese New Year from late May to late June (around school holidays) and Deepavali from mid-November to the end of December.

Malaysia

- Arrivals: 28,587 visitors, a 68.4% recovery vs. 2019.
- Travel Patterns: 86.8% travelled off-peak.
- Key Trends:
  Rising outbound interest post-pandemic; strong value-for-money mindset.
  Increased demand for halal-certified, community-based and bundled experiences.
  Growing influence of Muslim travel creators and peer-led recommendations.
  Rising travel tax from July 2025 may affect discretionary spending.
- Malaysians enjoy travelling to New Zealand for self-drive and campervan holidays. Malaysia's peak travel seasons are end-of-term school holidays in mid-February to mid-March and mid-May to June, Labaran holidays in April, and around Chinese New Year.

Indonesia

- Arrivals: 19,650 visitors, a 70.9% recovery vs. 2019.
  Travel Patterns: 82.2% travelled during off-peak periods.
- Key Trends:
  Affluent middle-class expected to double by 2030.
  Millennials and Gen Z driving outbound growth; prefer nature, soft adventure, culinary and cinematic storytelling.
  Influencers central to travel decisions; surge in mobile-shot short-form travel films.
  Preference for under-the-radar destinations, peaceful environments, and shared group experiences.
- Indonesian travellers are interested in soft adventure, nature, wildlife, landscapes, and trying local cuisine. Indonesia has a strong off-peak arrival. The peak travel seasons are school holiday periods, including Labaran Holidays in April and mid-December to early January.

Thailand

- Arrivals: 20,076 visitors, a 70.8% recovery vs. 2019.
  Travel Patterns: 86.6% travelled off-peak.
- Key Trends:
  Outbound travel surpassed pre-COVID levels in 2025; led by Millennials.
  Influencer content (especially YouTube vloggers) impacts 80% of bookings.
  Focus on value deals, budget-friendly packages, and emotive, experiential travel.
  Tech-savvy travellers prioritising seamless planning, local storytelling and community connections.
- Thais are high-spend visitors, and view New Zealand as having a positive and premium brand image. Thailand has strong off-peak arrivals. The peak travel seasons are during the Songkran Festival in April, their shoulder season, and the school holidays in June, mid-December to early January.

3. Event Objectives

Objectives

- Showcase New Zealand as a year-round destination for travel sellers focusing on off-peak.
- Build strong selling capability of travel sellers.
- Engage with existing and new networks of travel sellers and build on business relationships.
- Provide a platform for negotiating new and existing contracts with travel sellers.
- Stimulate the development of products.
- Increase New Zealand's share of voice in the travel trade in South East Asia.

4. Attendance/Attendees

Buyers:
Around 400 frontline sellers attended training and more than 250 product managers, directors, MICE managers attended networking events across Malaysia, Indonesia, Thailand and Singapore.
Livestream training organised on SEA Facebook group for buyers are not able to attend in person.

Sellers:
28 NZ companies, Auckland airport and Air New Zealand

Queenstown and Wānaka operators: The Helicopter Line/Totally Tourism, Ngai Tahu Tourism, Nomad Safaris, RealNZ, Millennium & Copthorne Hotels, Sudima Hotels New Zealand

5. Market Insights

Singapore

- Rest & relaxation remains top motivator; social-worthy, meaningful experiences are in demand.
- Gen Z travellers stretching budgets with bundled offerings.
- Instagram, TikTok, and influencer-created short videos are key inspiration sources.

Airlines:
- 38 weekly direct flights to NZ (AKL & CHC) via Air NZ & Singapore Airlines.
- SQ upgrading one AKL flight to A380 (Jan–Mar 2026); 23K extra CHC seats (Nov 2025–Feb 2026).
- Premium seat demand +95–114%; fares up 40% vs 2019.

Malaysia

- Early travel planning (1–6 months); strong interest in off-peak seasons.
- Demand for experiences over traditional itineraries.
- Religious/cultural sensitivity important – Halal-friendly services well received.

Airlines:
- 8x weekly nonstop flights by Malaysia Airlines; indirect services via SQ, NZ, Batik Air.
- Premium seat demand up 103–179%; fares increased 1–12%.

Indonesia

- 75% of travellers are value-driven but willing to adjust daily habits to save for travel.
- Mobile-first consumers inspired by relatable influencer content and aspirational visual storytelling.
- Visa processing times influence early bookings.

Airlines:
- No direct Jakarta–NZ service.
- Air NZ operates seasonal Bali–AKL; indirect routes via SQ and QF.

Thailand

- Price sensitivity increasing; value-centric mindset driving bookings.
- High digital influence on destination and flight decisions.
- Strong preference for autumn travel and short booking windows.

Airlines:

- No direct NZ flights; 84% transit via SYD, MEL, SIN, HKG or KUL.
- OTA and influencer campaigns are key to converting FIT market.

7. Summary

- Southeast Asia continues to show strong recovery, with SEA outbound travel in growth mode despite cautious consumer spending.
- SEA travelers predominantly favor New Zealand's off-peak seasons; 85% of active considerers indicate seasonal flexibility.
- New Zealand resonates well as a nature-rich, emotionally engaging, and experience-driven destination.
- Influencers, video content, and bundled value-based offerings are critical for visibility and conversion.
- Digital inspiration and indirect bookings via OTAs are growing; traditional trade remains essential in MY, ID, and TH.
- Muslim-friendly offerings (e.g. halal food) significantly influence destination choice in Malaysia and Indonesia.
- Education and continuous trade engagement are vital to ensure New Zealand remains top-of-mind for SEA agents.
- There is a strong opportunity to grow off-peak visitation to Queenstown through tailored campaigns, trade partnerships, and influencer collaborations aligned with school holidays and religious festivals in SEA.
- The increased visa application fee (from October 2024) can be an obstacle for some Southeast Asian travelers in Malaysia, Indonesia and Thailand.

8. Event Images

Group photo in Singapore

Queenstown and Wānaka operators

With SEA TNZ and Air NZ team


Yangzi representing DQ and LWT


Meeting TNZ in market representative Esther Ng for MICE