



MARKET INSIGHTS GUIDES

Australia

GAIN A DETAILED UNDERSTANDING OF DQ AND LWT'S GEOGRAPHIC FOCUS MARKETS THROUGH PROFILES THAT EXPLORE KEY DATA POINTS, TRAVELLER MOTIVATIONS, EXPERIENCE, EVOLVING TRENDS AND MARKET CONTEXTS

The Market Insights Guides are designed to support members by providing useful insights into visitors from the RTO's key focus markets. Each guide includes up-to-date information on visitor behaviours, current trends, and what travellers are seeking to experience both in the Queenstown Lakes district and wider New Zealand.

The guides are informed by a range of reputable district and national data sources, including the Queenstown Lakes Visitor Experience Survey, New Zealand International Visitor Survey, and International Visitor Arrivals data. Slight variations between guides exist in cases where specific data or research is unavailable, or the sample size is limited.

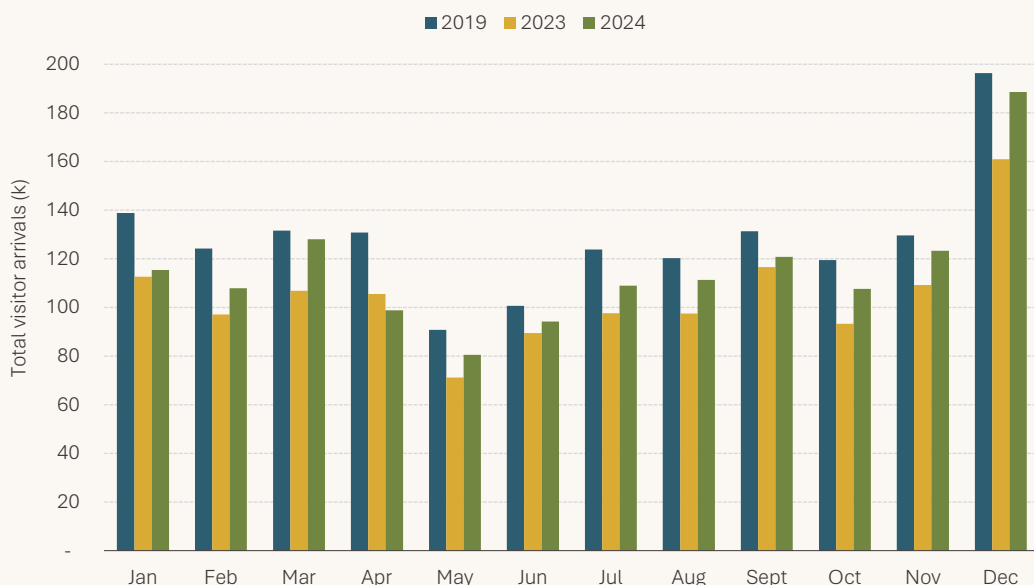


NEW ZEALAND TRAVEL INSIGHTS

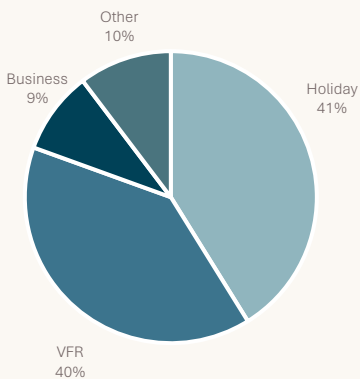
INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 1,385,310 international visitor arrivals from Australia, accounting for 42% of total international arrivals and making Australia New Zealand's largest international visitor market. Of these, 569,964 were holiday visitors, representing 41% of total Australian arrivals.

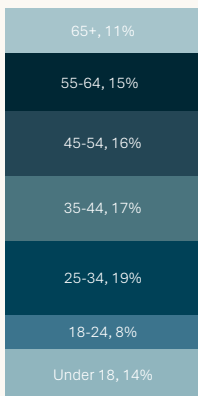
INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2023 AND 2024)



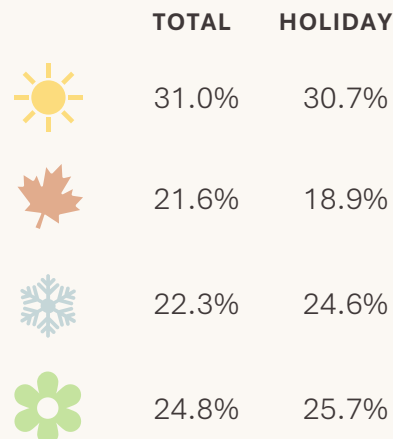
PURPOSE OF VISIT



AGE BREAKDOWN



SEASONALITY





NEW ZEALAND TRAVEL INSIGHTS

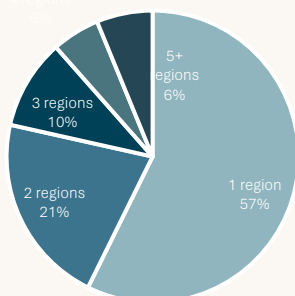
NEW ZEALAND TRIP INSIGHTS

12% of Australian visitors travelled to more than four regions in NZ. They spent approximately \$3.5 billion, including \$1.9 billion by holidaymakers. Average spend per trip was \$2,774, rising to \$3,801 for holiday visitors. Length of stay total is 11 days for both holiday makers and total visitors.

REGIONAL VISITATION

12%

OF VISITORS GO TO 4+ REGIONS



Total visitors

21%

VISIT QUEENSTOWN

6%

VISIT WĀNAKA

Holiday visitors

54%

VISIT QUEENSTOWN

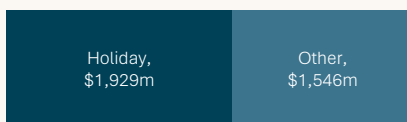
11%

VISIT WĀNAKA

SPEND (\$M)

\$3.5b

TOTAL MARKET SPEND



TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



I've always wanted to visit



The variety of outdoor and adventure activities



Visiting friends and family that live in NZ



It was somewhere new, I had never been there before

LENGTH OF STAY

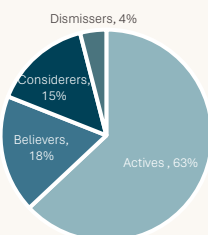


SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

SUSTAINABILITY MINDSET

81%

ACTIVE OR BELIEVERS



81% of Australian people who find NZ an appealing holiday destination fall into Kantar's sustainability segments of Actives or Believers, higher than Australia's average of 53%.

CURRENT SUSTAINABLE TRAVEL CHOICES



73%

are willing to invest time and money to make sustainable choices

FUTURE SUSTAINABLE TRAVEL CHOICES



79%

believe that in future they will have to increase efforts to travel in a more sustainable way.

PERCEIVED BARRIERS THAT PREVENT SUSTAINABLE TRAVEL



More expensive



Hard to identify if operations are sustainable



Not sure if sustainability claims are trustworthy

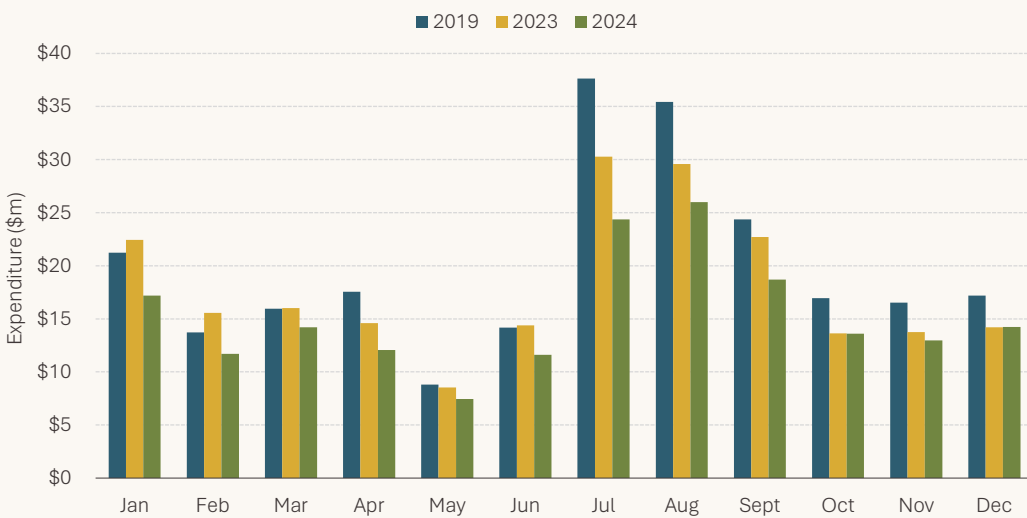


QUEENSTOWN LAKES TRAVEL INSIGHTS

TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from Australian visitors in the Queenstown Lakes reached \$184m, accounting for 28% of total international expenditure.

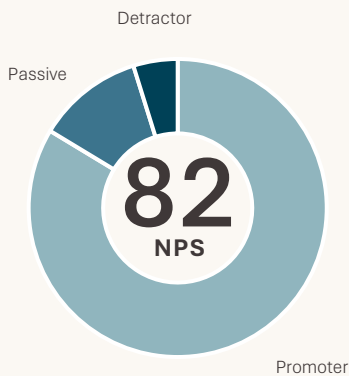
EXPENDITURE (\$M) BY MONTH (2019 AND 2023 COMPARED TO 2024)



VISITOR EXPERIENCE INSIGHTS

Queenstown Lakes boasts an impressive Net Promoter Score (NPS) of +82 over the past 24 months from Australian visitors indicating strong advocacy for the region as a visitor destination.

NET PROMOTER SCORE



TOP MOTIVATIONS FOR VISITING THE QUEENSTOWN LAKES DISTRICT





QUEENSTOWN LAKES TRAVEL INSIGHTS

VISITOR EXPERIENCE INSIGHTS

LOCATIONS VISITED

4.7
AVERAGE NUMBER OF LOCATIONS VISITED

94%	Queenstown town centre
71%	Arrowtown
53%	Wānaka town centre
51%	Frankton
37%	Glenorchy
33%	Cardrona Valley
24%	Lake Hāwea
23%	Arthur's Point
20%	Gibbston Valley
18%	Lake Hayes
12%	Kingston
8%	Kelvin Heights/Peninsula
8%	Glendhu Bay + surrounds
6%	Makarora + surrounds
4%	Luggate

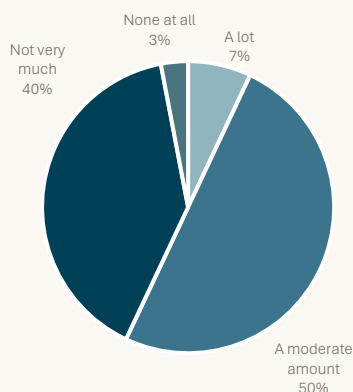
ACTIVITIES UNDERTAKEN

5.3
AVERAGE NUMBER OF ACTIVITIES UNDERTAKEN

Top Activities	79%	Restaurants and cafés
	69%	Shopping
69%	69%	Walking and hiking
Walking / hiking	67%	Sightseeing
	37%	Lake cruising and river activities
37%	33%	Wineries or other wine experiences
Lake cruising and river activities	25%	Ski, snow, ice activities
	24%	Art galleries, museums, historic buildings or sites
23%	22%	Cycling/biking
Wineries and other related experiences	19%	Bars/nightclubs
	16%	Adrenaline activities
	15%	Cultural or heritage experiences
	13%	Flying/air activities
	11%	Wellness experiences
	9%	Community event/giving back to the region
	8%	Farm, animal or nature experience
	8%	Golf
	8%	Land activities

SUSTAINABLE TRAVEL ATTITUDES AND BEHAVIOURS





INTERACTION WITH LOCALS



TOP SUSTAINABLE TRAVEL ATTITUDES HELD

-  Respecting and preserving local heritage and traditions of a destination
-  Protecting and restoring the local environment at a destination
-  Leaving places better than they were when you arrived
-  Considering over tourism and the negative impacts of tourists

TOP SUSTAINABLE TRAVEL BEHAVIOURS TAKEN IN REGION

-  Limited my environmental impact by reducing excess waste (e.g. by avoiding single-use plastics)
-  Reduced carbon emissions public transport, walking/cycling to get around
-  Explored the local area and attractions more than most other visitors would
-  Travelled outside of peak season to limit impacts



QUEENSTOWN PERCEPTIONS INSIGHTS*

DESTINATION PERCEPTIONS INSIGHTS

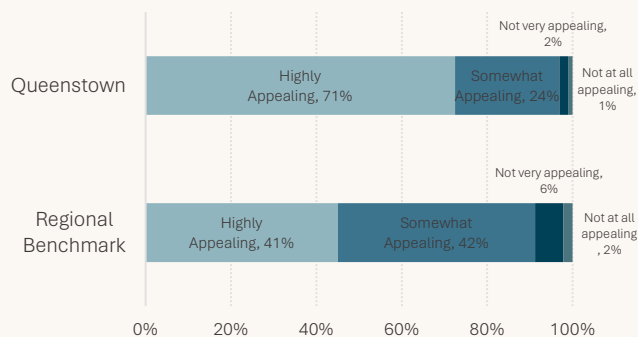
Queenstown remains a highly appealing destination, with 95% of Australian respondents stating they find it highly or somewhat appealing. 40% of Australian travellers intend to visit New Zealand, and of that 40%, 74% of respondents will definitely or probably visit in the next 12 months

DESTINATION APPEAL

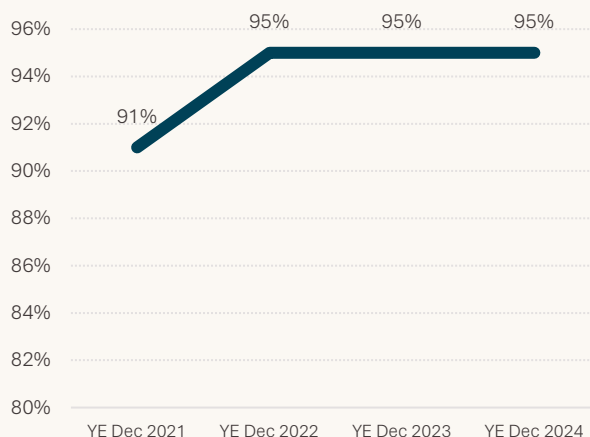


95%

FIND QUEENSTOWN HIGHLY OR SOMEWHAT APPEALING



APPEAL OVER TIME



Percentage of respondents that find Queenstown somewhat or very appealing

PROPENSITY TO VISIT



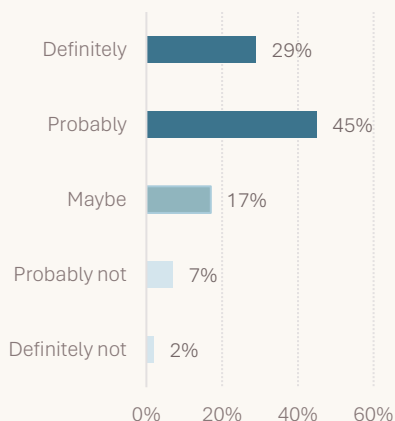
40%

OF AUSTRALIAN TRAVELLERS INTEND TO VISIT NZ IN THE NEXT 12 MONTHS



74%

OF TRAVELLERS INTEND TO VISIT NZ IN THE NEXT 12 MONTHS INTEND TO VISIT QUEENSTOWN



EXPERIENCE ASSOCIATIONS

Top Associations



45%

Walking / hiking



42%

Adrenaline activities



23%

Skiing/ snowboarding

- 45%** Restaurants, Cafés & Bars
- 45%** Walking & Hiking
- 44%** Adrenaline Activities
- 44%** Scenic Sight-Seeing
- 42%** Skiing/Snowboarding
- 35%** Nature, Wildlife & Eco-tourism
- 33%** Family Activities
- 30%** Water-based Activities
- 28%** Cycling/Mountain Biking
- 27%** History & Heritage
- 27%** Gardens, Parks & Reserves
- 25%** Shopping
- 20%** Spa & Wellness
- 17%** Wineries, breweries or distilleries
- 17%** Fishing or Hunting

* Note Destination Perceptions research is only carried out for the Queenstown region NOT Queenstown Lakes (which is Queenstown and Wānaka)



MARKET CONTEXT INSIGHTS

OVERVIEW

Australia's cultural identity is deeply connected to its ecosystems, from the Great Barrier Reef to the outback, which are increasingly threatened by climate change. Despite a history of economic prosperity, recent signs of a slowdown reflect global shifts, complicating the impact of climate change. Economic growth is expected to be sluggish, with GDP rising 2-2.5%. Mining, energy, and tourism will remain key to economic performance, while the transition to renewable energy, rising demand for critical minerals, and infrastructure investments will drive long-term growth. China's economic trajectory and geopolitical tensions will also remain influential.

ECONOMIC

Australia's economy, the 14th largest globally in 2023, has shown resilience despite slowing growth. After decades of expansion, GDP rose just 0.3% in the September 2024 quarter and 0.6% in the December 2024 quarter, with annual growth at 1.0%. Inflation eased to 2.4% in early 2025, though underlying pressures persist. The labour market remains tight (4.1% unemployment). Key sectors include finance, construction, healthcare, mining, and manufacturing. Growth in 2025 is projected at 1.5-2.0%, amid global uncertainty. Opportunities lie in strong population growth and renewables, while challenges include inflation, housing, productivity, and trade tensions.

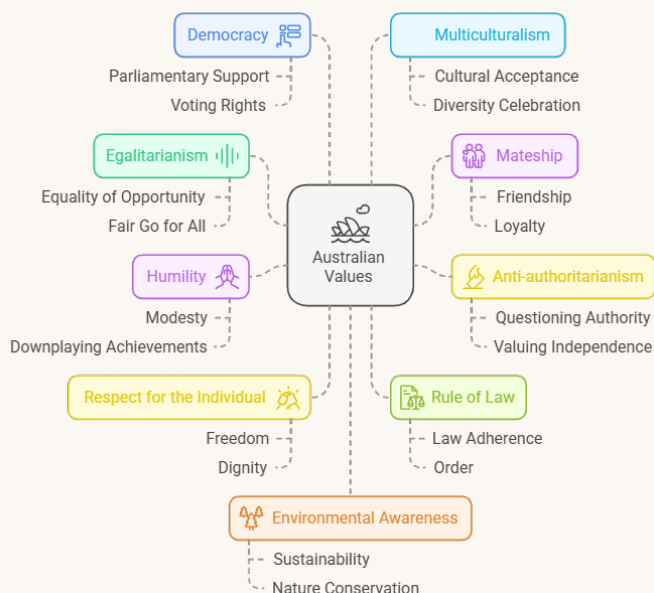
ENVIRONMENT

Australia is targeting a 43% cut in greenhouse gas emissions by 2030 (from 2005 levels) and net-zero by 2050 but remains one of the most carbon-intensive countries, with high per capita emissions. By 2023, emissions had dropped 28% including land use changes, but just 2% when excluding them. Coal still generates nearly half of the country's electricity. Biodiversity is in decline. While projections show the 2030 goal is nearly achievable (42.6-42.7% reduction), actual progress excluding land use changes lags (17-21%). Climate change threatens ecosystems, water security, and agriculture, while public support for stronger climate action continues to grow.

SOCIETY & CULTURE

Australia, home to around 27.2 million people, is a diverse society shaped by Indigenous heritage, colonial history, and immigration (31% overseas born). While living standards are high, challenges include income inequality, elderly poverty, housing stress, and institutional distrust. Population ageing (17.3% aged 65+ in 2024) and low fertility mean migration drives growth, fuelling discourse on racism and cohesion. Younger generations are more vocal on climate and justice. Despite this, strengths remain in health, education, skilled migration, and cultural values like mateship and fairness.

VALUES AND MOTIVATIONS



ABOUT

Destination Queenstown (DQ) and Lake Wānaka Tourism (LWT) are the Regional Tourism Organisations (RTOs) responsible for destination marketing, both domestically and internationally, and destination management, delivering selected initiatives from the Queenstown Lakes' destination management plan.

The RTOs' role is to market Queenstown and Wānaka as leading tourism destinations. This focuses on attracting high contributing visitors and supporting the delivery of the destination management plan to ensure we have a resilient and future focused industry, within a thriving community and environment. DQ and LWT communicate and connect with visitors to generate preference for our region and to create understanding of our place and our values. We help businesses to be resilient and prepared for the future through capability building and we engage with our community and show leadership in caring for our place.

The RTO strategy has evolved to support the goals of Travel to a Thriving Future, as well as continuing to support the visitor economy with values aligned marketing, product development and capability building in line with a regenerative tourism future.

FOCUS GEOGRAPHIC MARKETS

The RTOs prioritise key geographic markets based on strategic considerations, including aviation connectivity, the likelihood of visitors choosing Queenstown/Wānaka, and alignment with the behaviours of high-contributing visitors. This approach maximises return on investment for members while enabling effective collaboration with partners such as Tourism New Zealand. By aligning with Tourism New Zealand's international marketing efforts, the impact of regional initiatives can be further amplified.

PRIORITY FOCUS MARKETS

- New Zealand
- Australia
- China
- United States of America

SECONDARY FOCUS MARKETS

- India
- Southeast Asia (Malaysia, Singapore, Indonesia)
- United Kingdom
- Europe (Germany)

ADDITIONAL MARKET PRESENCE

- Japan
- South Korea

SOURCES

NEW ZEALAND TRAVEL INSIGHTS

International Visitor Arrivals Insights, based on International Visitor Arrivals data (year ended December 2024), accessed via [Infoshare, Stats NZ](#) on 15 March 2025.

New Zealand Trip Insights, based on International Visitor Survey data (year ended December 2024), accessed via [Tourism New Zealand International Visitor Survey Dashboard](#) on 15 March 2025. Time period: 1 January 2024 – 31 December 2024. Sample size: Australia total respondents (n = 2776); Australia holiday respondents (n = 1129)

Intersect of Sustainability and Travel Insights, based on Tourism New Zealand research [The Role of Sustainability in Destination and Operator Choice](#) (December 2023), accessed on 16 March 2025.

QUEENSTOWN LAKES TRAVEL INSIGHTS

Tourism Related Expenditure Insights, based on Marketview data (year ended December 2024), accessed through Marketview Council Tool on 28 March 2025.

Visitor Experience Insights and Sustainable Travel Attitudes and Behaviours Insights, based on Queenstown Lakes Visitor Experience Survey, Destination Queenstown and Lake Wānaka Tourism, conducted by Angus & Associates. Time period: 1 January 2023 – 31 December 2024. Sample size: total Australian respondents (n = 509).

Destination Perceptions Insights, based on Queenstown Destination Perceptions Survey, Destination Queenstown, conducted by Angus & Associates. Time period: 1 January 2024 – 31 December 2024. Sample size: total Australian respondents familiar with Queenstown (n = 1279).

MARKET CONTEXT INSIGHTS

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