



MARKET INSIGHTS GUIDES

Canada



**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.

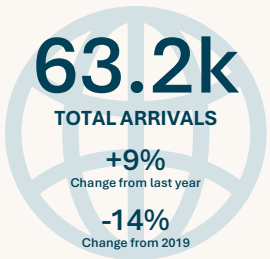
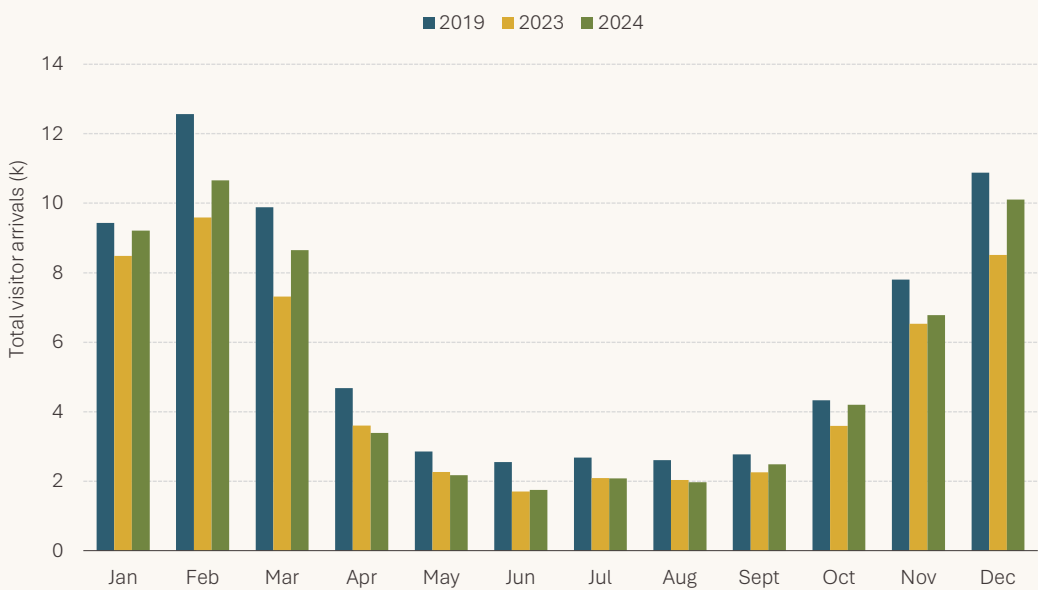


NEW ZEALAND TRAVEL INSIGHTS

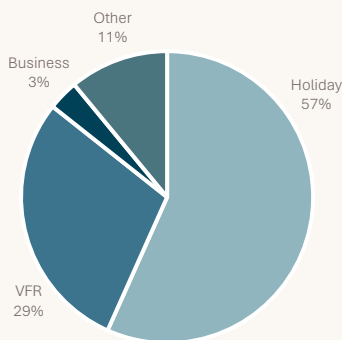
INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 63,459 international visitor arrivals from Canada, accounting for 1.9% of total international arrivals and making it New Zealand’s ninth largest international visitor market. Of these, 34,233 were holiday visitors, representing 57% of total Canadian arrivals.

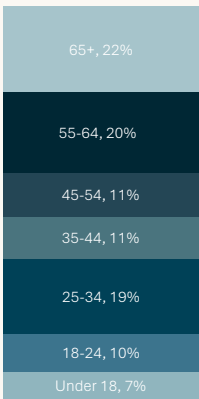
INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2023 AND 2024)



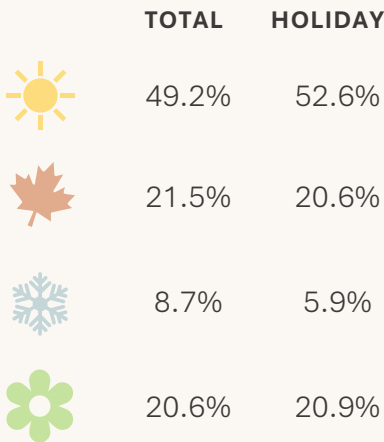
PURPOSE OF VISIT



AGE BREAKDOWN



SEASONALITY





NEW ZEALAND TRAVEL INSIGHTS

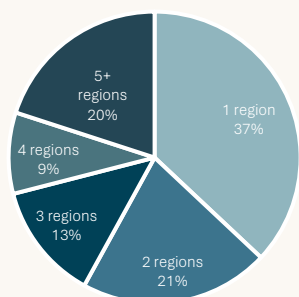
NEW ZEALAND TRIP INSIGHTS

29% of Canadian visitors travelled to more than four regions in NZ. They spent \$257 million, including \$135 million by holidaymakers. Average spend per trip was \$4,702, rising to \$4,844 for holiday visitors. Length of stay total is 31 days, with a shorter length of stay of 18 days for holiday visitors

REGIONAL VISITATION

29%

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

24%

QUEENSTOWN

6%

WĀNAKA

Holiday visitors that stayed in

32%

QUEENSTOWN

8%

WĀNAKA

SPEND (\$M)

\$257m

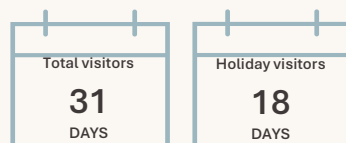
TOTAL MARKET SPEND



Total visitors
\$4,702
AVERAGE SPEND PER TRIP

Holiday visitors
\$4,844
AVERAGE HOLIDAY SPEND PER TRIP

LENGTH OF STAY



TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



It was somewhere new, I had never been there before



Visiting friends or family that live in NZ



I've always wanted to visit



The Hobbit and Lord of the Ring Movies

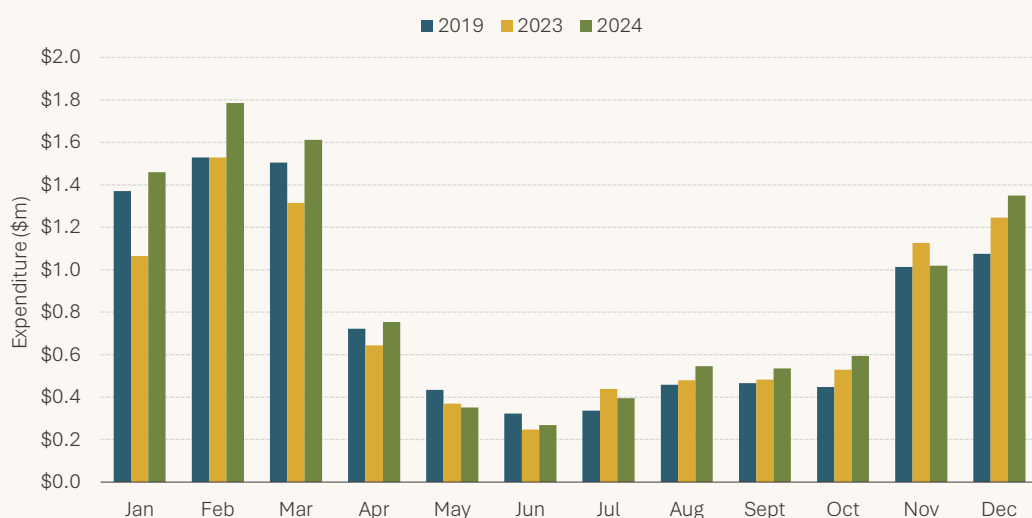


QUEENSTOWN LAKES TRAVEL INSIGHTS

TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from Canadian visitors in the Queenstown Lakes reached \$10.7, accounting for 1.7% of total international expenditure.

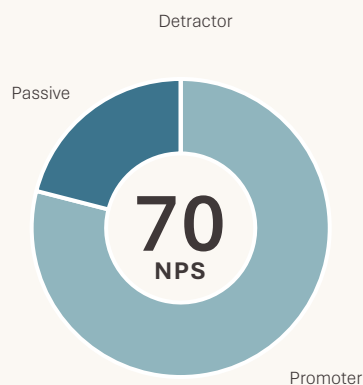
EXPENDITURE (\$M) BY MONTH (2019 AND 2023 COMPARED TO 2024)



VISITOR EXPERIENCE INSIGHTS*

Queenstown Lakes has a Net Promoter Score (NPS) of +70 over the past 12 months from the Canadian market indicating advocacy for the region as a destination.

NET PROMOTER SCORE



TOP MOTIVATIONS FOR VISITING THE QUEENSTOWN LAKES DISTRICT



* the sample size for this market is limited; please interpret the results with caution.



QUEENSTOWN LAKES TRAVEL INSIGHTS

VISITOR EXPERIENCE INSIGHTS*

LOCATIONS VISITED



4.4

AVERAGE NUMBER OF LOCATIONS VISITED

86%	Queenstown town centre
57%	Arrowtown
57%	Wānaka town centre
36%	Glenorchy
36%	Lake Hāwea
32%	Frankton
29%	Arthur's Point
25%	Cardrona Valley
18%	Glendhu Bay + surrounds
18%	Makarora + surrounds
14%	Kelvin Heights/Peninsula
11%	Luggate
7%	Gibbston Valley
7%	Kingston
7%	Lake Hayes

ACTIVITIES UNDERTAKEN



4.8

AVERAGE NUMBER OF ACTIVITIES UNDERTAKEN

Top Activities



86%

Walking / hiking



28%

Lake cruising and river activities



28%

Wineries or other wine experiences

86%

Walking/ hiking

69%

Restaurants and cafés

66%

Shopping

59%

Sightseeing

28%

Lake cruising and river activities

28%

Wineries or other wine experiences

24%

Art galleries, museums, historic buildings or sites

24%

Cycling/biking

17%

Bars/nightclubs

17%

Cultural or heritage experiences

14%

Adrenaline activities

14%

Farm, animal or nature experience

10%

Community event/giving back to the region

7%

Ski, snow, ice activities

7%

Wellness experiences

3%

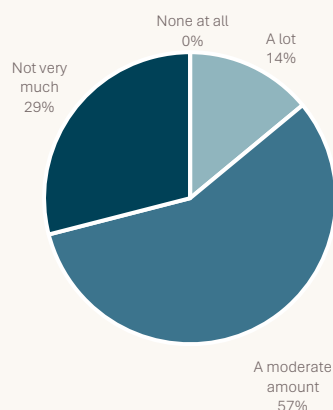
Golf

3%

Land activities

SUSTAINABLE TRAVEL ATTITUDES AND BEHAVIOURS*

INTERACTION WITH LOCALS



TOP SUSTAINABLE TRAVEL ATTITUDES HELD



Respecting and preserving local cultural heritage and traditions of a destination



Leaving places better than they were when you arrived



Protecting and restoring the local environment at a destination



Considering overtourism and the negative impacts of tourism

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



Slowed down and stayed longer than most other visitors



Travelled outside of peak seasons to limit the impact of overcrowding

* the sample size for this market is limited; please interpret the results with caution.

MARKET CONTEXT INSIGHTS

OVERVIEW

Canada is a high-income, resource-rich country with a stable political system and a diverse, growing population of around 40 million. Economic growth moderated to 1.1% in 2024 due to high interest rates, with a cautious recovery expected in 2025. The country is a global leader in clean technology and climate policy, though challenges remain around emissions from the energy sector and fragmented climate action. Canada faces structural pressures from an ageing population, housing affordability, and interprovincial disparities, but its strengths in multiculturalism, education, and innovation offer strong foundations for inclusive and sustainable growth.

ECONOMIC

Canada’s economy grew by an estimated 1.1% in 2024, as higher interest rates continued to weigh on household consumption and business investment (IMF, 2024). Inflation declined to 2.6% in early 2025—within the Bank of Canada’s target range—after peaking above 8% in 2022 (BoC, 2025). Unemployment remains relatively low at 5.8% (Statistics Canada, 2025), though job creation has slowed. GDP growth for 2025 is projected at 1.4–1.6%, with the central bank expected to cautiously ease monetary policy. Risks include high household debt, housing affordability, and global trade uncertainty—particularly from the US and China. Opportunities lie in Canada’s strong services sector, growing clean tech ecosystem, abundant natural resources, and a stable financial system (OECD, 2024). Long-term structural challenges include productivity stagnation, demographic aging, and interprovincial economic disparities.

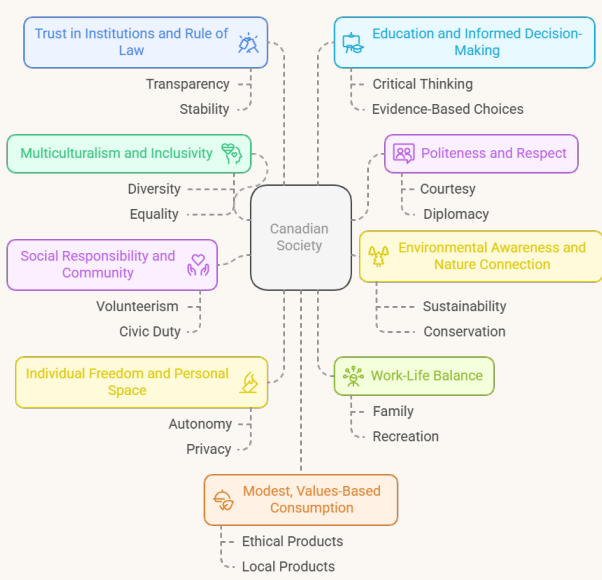
ENVIRONMENT

Canada, the world’s second-largest country by area, is both rich in biodiversity and vulnerable to climate change impacts. Warming is occurring at twice the global average (Environment and Climate Change Canada, 2023). The country aims to reduce GHG emissions by 40–45% below 2005 levels by 2030 and reach net-zero by 2050. Emissions fell by 8.4% from 2005 to 2021, largely due to electricity decarbonisation, but oil and gas production remains a major emissions source (ECCC, 2023). Canada’s carbon pricing framework is internationally recognised, and public investment is flowing into EVs, hydrogen, renewables, and nature-based solutions. However, challenges remain: emissions from transportation and oil sands, slow grid integration, and provincial fragmentation in climate policy. Canada also faces pressures on freshwater resources, declining biodiversity, and the need to climate-proof infrastructure.

SOCIETY & CULTURE

Canada has a population of around 40 million, and continues to grow through high levels of immigration - contributing to one of the most multicultural societies globally. More than 23% of the population is foreign-born. While quality of life is high, challenges persist in housing affordability, Indigenous inequality, and healthcare system strain. The median age is 41.6, and nearly 19% of the population is over 65, making aging a growing concern for labour markets and pension systems. Canada is officially bilingual, with ongoing efforts to advance Indigenous reconciliation and preserve linguistic and cultural heritage. Social cohesion is generally strong, but polarisation around climate, migration, and economic inequality has increased in recent years. Opportunities lie in Canada’s inclusive values, educated workforce, and global cultural engagement—particularly through the arts, tech, and education sectors.

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: total respondents (n = 361); holiday respondents (n = 185)

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 respondents (n = 29).

MARKET CONTEXT INSIGHTS

- IMF (2024). World Economic Outlook: Canada.
- Statistics Canada (2025). Labour Force Survey, March 2025.
- OECD (2024). Canada Economic Survey.
- Environment and Climate Change Canada (2023). National Inventory Report 1990–2021: GHG Sources and Sinks in Canada.
- Climate Action Tracker (2024). Canada Country Assessment.
- WWF Canada (2023). Living Planet Report Canada.
- Statistics Canada (2024). Population and Demographic Statistics.
- OECD (2024). Society at a Glance: Canada Highlights.
- Indigenous Services Canada (2024). Annual Report to Parliament.