



MARKET INSIGHTS GUIDES

China



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.

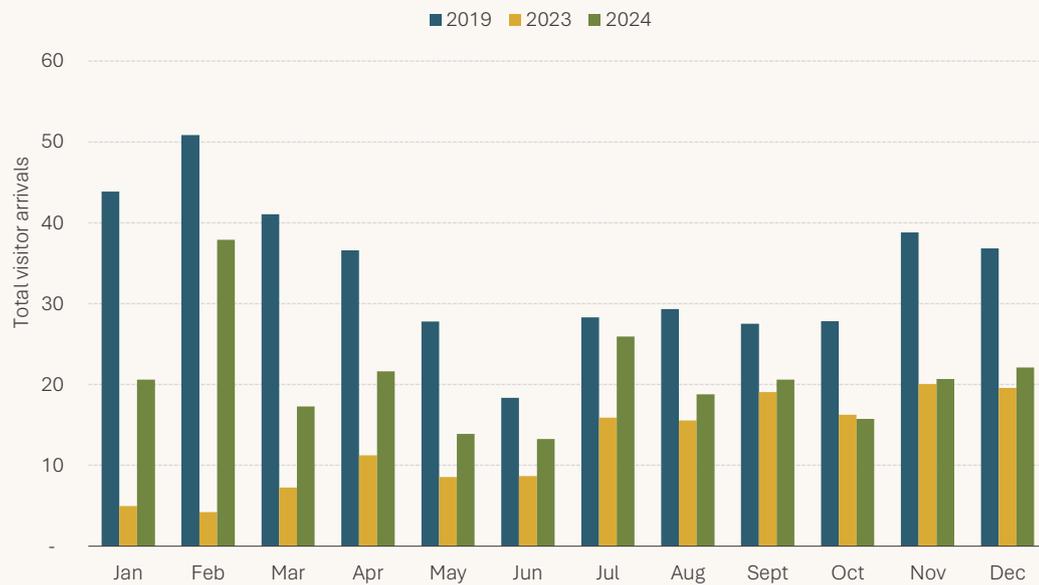


NEW ZEALAND TRAVEL INSIGHTS

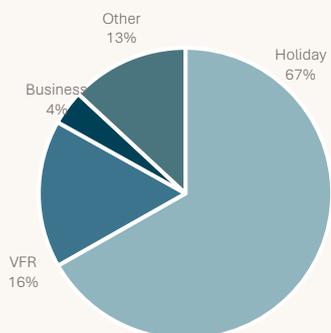
INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 247,251 international visitor arrivals from China, accounting for 7.5% of total international arrivals and making China New Zealand's third-largest international visitor market. Of these, 165,069 were holiday visitors, representing 67% of total Chinese arrivals.

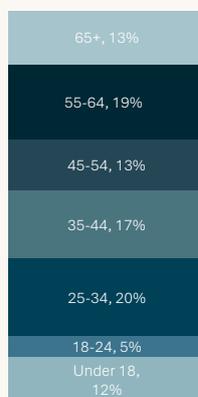
INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2024)



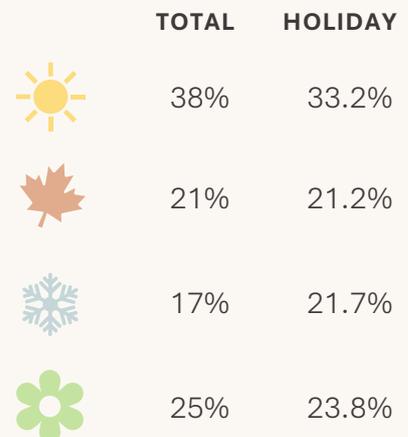
PURPOSE OF VISIT



AGE BREAKDOWN



SEASONALITY





NEW ZEALAND TRAVEL INSIGHTS

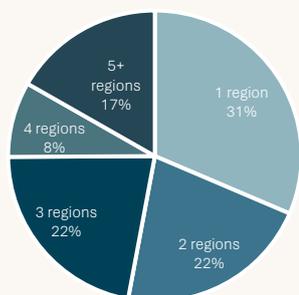
NEW ZEALAND TRIP INSIGHTS

25% of Chinese visitors travelled to more than four regions in NZ. They spent approximately \$1.4 billion, including \$1.05 billion by holidaymakers. Average spend per trip was \$6,450, rising to \$7,039 for holiday visitors. Length of stay total is 22 days, with a length of stay of 16 days for holiday visitors.

REGIONAL VISITATION

25%

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

39%

QUEENSTOWN

11%

WĀNAKA

Holiday visitors that stayed in

51%

QUEENSTOWN

15%

WĀNAKA

SPEND (\$M)

\$1.4B

TOTAL MARKET SPEND



Total visitors

\$6,450

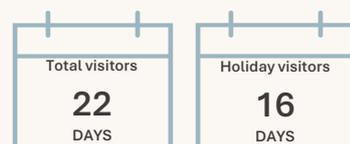
AVERAGE SPEND PER TRIP

Holiday visitors

\$7,039

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



The variety of outdoor and adventure activities



I've always wanted to visit



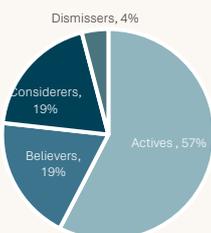
It's a safe place to visit and less crowded

SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

SUSTAINABILITY MINDSET

76%

ACTIVE OR BELIEVERS



76% of Chinese who find NZ an appealing holiday destination fall into Kantar's sustainability segments of Actives or Believers, higher than China's average of 49%.

CURRENT SUSTAINABLE TRAVEL CHOICES



95%

are willing to invest time and money to make sustainable choices

FUTURE SUSTAINABLE TRAVEL CHOICES



94%

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

PERCEIVED BARRIERS THAT PREVENT SUSTAINABLE TRAVEL



Destinations lack sustainable infrastructure



More time consuming, less convenient



Hard to identify if operations are sustainable

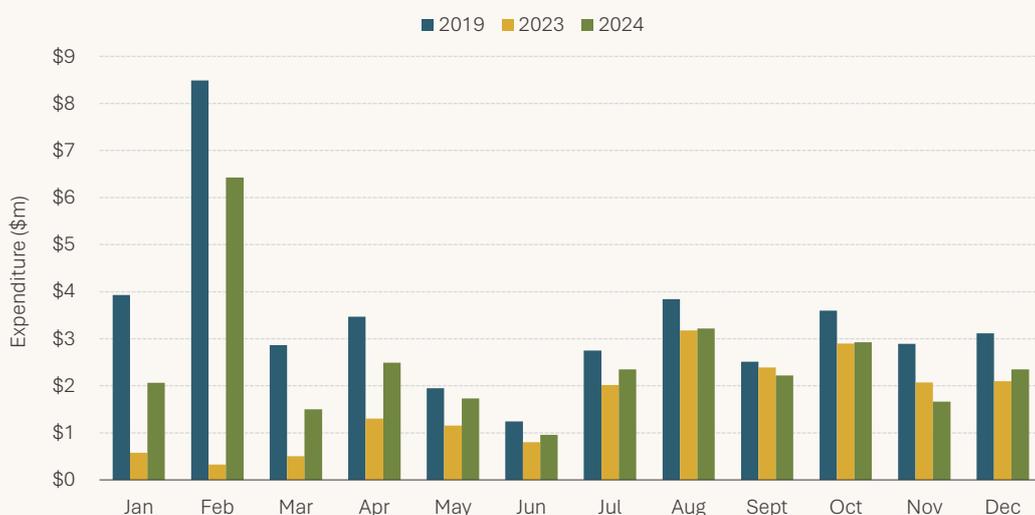


QUEENSTOWN LAKES TRAVEL INSIGHTS

TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from the Chinese market in the Queenstown Lakes reached \$29.9m, accounting for 5% of total international expenditure. It is important to note that this data source doesn't capture app-based payment methods like Alipay or WeChat, which is increasingly popular in the Chinese market.

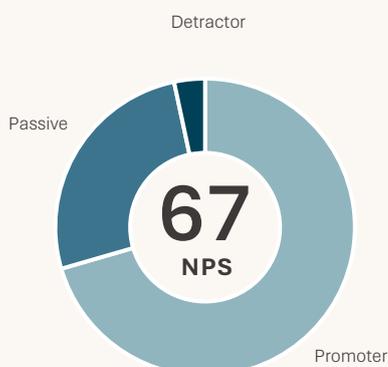
EXPENDITURE (\$M) BY MONTH (2019 AND 2023 COMPARED TO 2024)



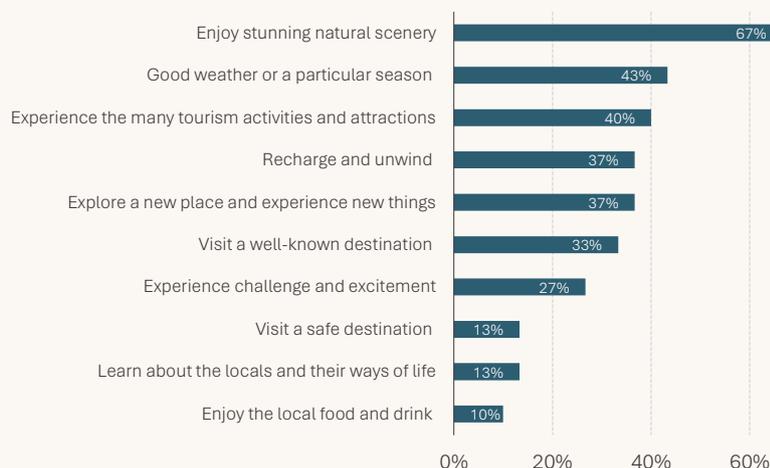
VISITOR EXPERIENCE INSIGHTS*

Queenstown Lakes boasts a Net Promoter Score (NPS) of +67 over the past 12 months from Chinese visitors indicating advocacy for the region as a visitor 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

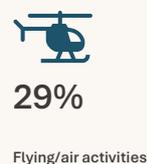
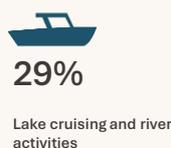


88%	Queenstown town centre
46%	Wānaka town centre
42%	Arrowtown
31%	Glenorchy
31%	Lake Hāwea
12%	Frankton
8%	Lake Hayes
4%	Cardrona Valley

ACTIVITIES UNDERTAKEN



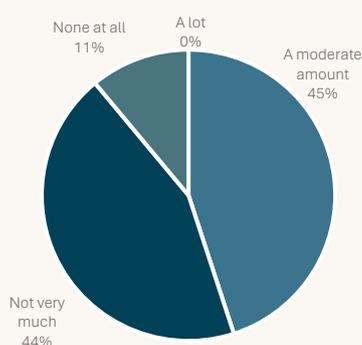
Top Activities



71%	Restaurants and cafés
67%	Shopping
63%	Walking, hiking, climbing, trekking, tramping
58%	Sightseeing
29%	Flying/air activities
29%	Lake cruising and river activities
25%	Farm, animal or nature experience
13%	Art galleries, museums, historic buildings or sites
13%	Land activities
8%	Cultural or heritage experiences
8%	Ski, snow, ice activities
4%	Adrenaline activities
4%	Bars/nightclubs
4%	Wellness experiences
4%	Wineries or other wine experiences
4%	Wellness experiences

SUSTAINABLE TRAVEL ATTITUDES AND BEHAVIOURS*

INTERACTION WITH LOCALS



TOP SUSTAINABLE TRAVEL ATTITUDES HELD

- Protecting and restoring the local environment at a destination
- Considering over-tourism and the negative impact of tourists
- Leaving places better than they were when you arrived
- Connecting with locals and understanding their ways of life

TOP SUSTAINABLE TRAVEL BEHAVIOURS TAKEN IN REGION

- Limited my environmental impact by reducing excess waste (e.g. by avoiding single-use plastics)
- Travelled outside of peak seasons to limit the impact of overcrowding
- Explored the local area and attractions more than most other visitors would
- Took time to care for the natural environment in some way (e.g. litter collection, tree planting)

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



MARKET CONTEXT INSIGHTS

OVERVIEW

China's economic rise has made it a global force, though rapid growth brings challenges. The country is a leader in renewable energy despite environmental issues. Rapid societal changes, including income inequality, corruption, a growing middle class, increasing urbanisation, and a tech-savvy population, signal a shifting society with significant potential for innovation. In 2025, China's economy is expected to stabilise with a focus on technological innovation, green development, and domestic consumption. The government targets a 5% GDP growth in 2025 with hopes to navigate global uncertainties.

ECONOMIC

China's economy expanded by 5.0% in 2024, supported by policy easing and resilient exports. However, domestic demand remained subdued, weighed down by the ongoing property market correction and fragile consumer confidence. Economic momentum slowed further into early 2025, with inflation staying exceptionally low. The IMF forecasts growth to decelerate to 4.0% in 2025, reflecting continued real estate challenges and the drag from US tariffs. In response, policy is expected to prioritise domestic consumption, strategic sectors, and high-tech development. While China offers opportunities in its vast internal market, robust manufacturing base, and global green tech leadership (e.g., solar, EVs), it also faces structural challenges: rebalancing toward consumption, managing demographic decline, reducing debt, and navigating intensifying geopolitical and trade tensions.

ENVIRONMENT

As the world's largest greenhouse gas emitter, China grapples with deep environmental challenges rooted in its rapid industrial growth - air and water pollution, soil degradation, and biodiversity loss. Climate vulnerability is high. China has pledged to peak CO₂ emissions before 2030 and achieve carbon neutrality before 2060. It leads globally in renewable energy and EV uptake, with major investments in grid modernisation and storage. However, reliance on coal remains entrenched, with ongoing approvals for new coal plants signalling policy tension between environmental goals and energy security. Opportunities include influencing global green tech affordability and improving local air quality. Yet, China must overcome major hurdles: phasing out coal responsibly, ensuring grid resilience, addressing water scarcity, and aligning climate goals with development and geopolitical priorities.

SOCIETY & CULTURE

China has lifted millions of its citizens out of poverty, but inequality remains - between urban and rural populations, and across regions. The household registration system continues to limit access to services for internal migrants. Extensive social controls shape public life. China is now facing a demographic challenge, with population decline beginning in 2022 due to rapid ageing and falling birth rates - placing pressure on labour supply and social welfare systems. Urbanisation is ongoing, and a tech-savvy middle class is rising, blending modern aspirations with traditional values. Opportunities lie in harnessing the domestic consumer market, investing in education and health, and expanding digital services. Key challenges include managing demographic shifts, reducing inequality, and maintaining social cohesion amid tight political oversight.

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 = 1101); holiday respondents (n = 772)

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 = 103).

MARKET CONTEXT INSIGHTS

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