



MARKET INSIGHTS GUIDES

India



**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 Audience 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.

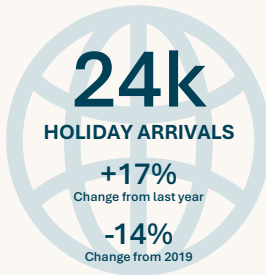
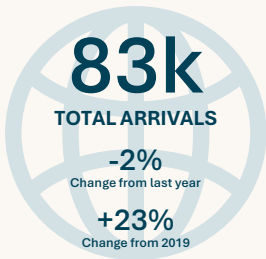
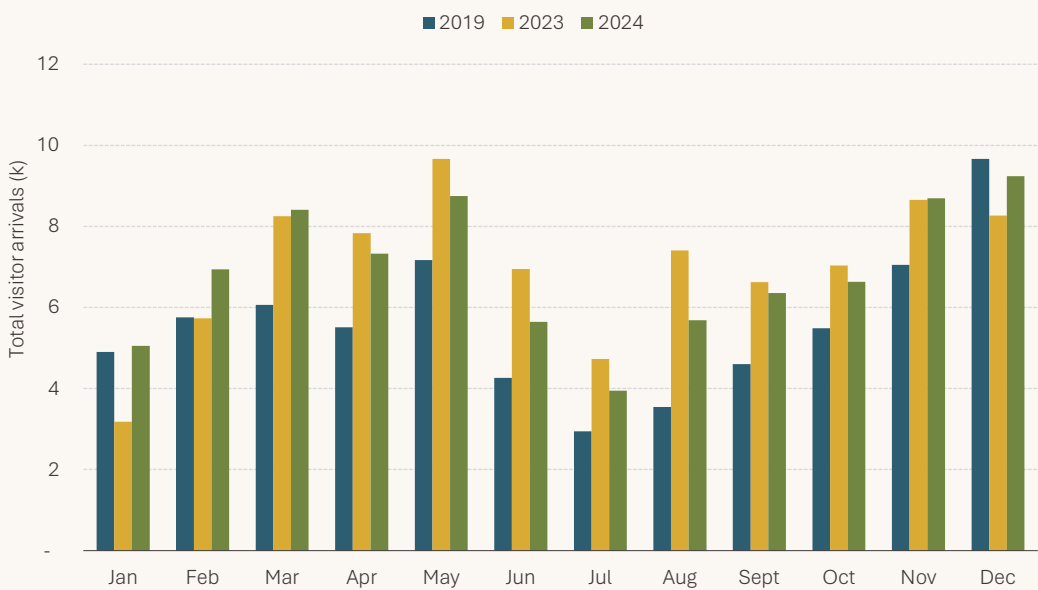


NEW ZEALAND TRAVEL INSIGHTS

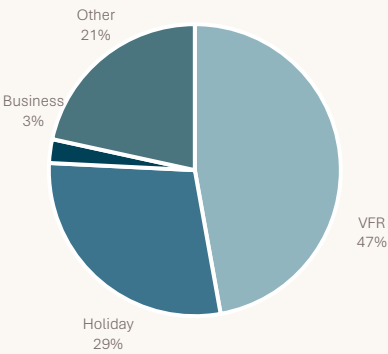
INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 83,662 international visitor arrivals from the India, accounting for 2.5% of total international arrivals and making India New Zealand’s fifth largest international visitor market. Of these, 23,655 were holiday visitors, representing 24% of total UK arrivals.

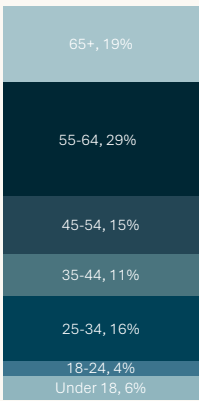
INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2024)







PURPOSE OF VISIT



AGE BREAKDOWN



SEASONALITY

	TOTAL	HOLIDAY
	24.9%	29.8%
	18.6%	31.4%
	8.4%	9.9%
	20.5%	28.8%



NEW ZEALAND TRAVEL INSIGHTS

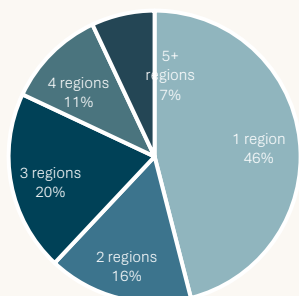
NEW ZEALAND TRIP INSIGHTS

18% of Indian visitors travelled to more than four regions in NZ. They spent approximately \$226 million, including \$87 million by holidaymakers. Average spend per trip was \$4,863, rising to \$5,654 for holiday visitors. Length of stay total is 32 days, with a length of stay of 16 days for holiday visitors.

REGIONAL VISITATION

18%

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

23%

QUEENSTOWN

5%

WĀNAKA

Holiday visitors that stayed in

54%

QUEENSTOWN

15%

WĀNAKA

SPEND (\$M)

\$226m

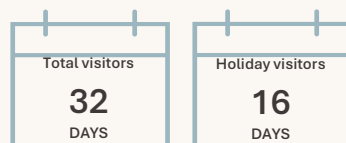
TOTAL MARKET SPEND



Total visitors
\$4,863
AVERAGE SPEND PER TRIP

Holiday visitors
\$5,654
AVERAGE HOLIDAY SPEND PER TRIP

LENGTH OF STAY



TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



I've always wanted to visit



The variety of outdoor and adventure activities



It's a safe place to visit and is less crowded



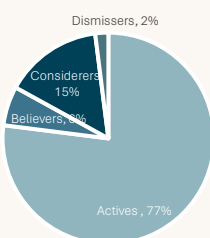
Visiting friends and family that live in NZ

SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

SUSTAINABILITY MINDSET

83%

ACTIVE OR BELIEVERS



83% of Indian people who find NZ an appealing holiday destination fall into Kantar's sustainability segments of Actives or Believers, higher than the India's average of 55%.

CURRENT SUSTAINABLE TRAVEL CHOICES



95%

are willing to invest time and money to make sustainable choices

FUTURE SUSTAINABLE TRAVEL CHOICES



95%

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



MARKET CONTEXT INSIGHTS

OVERVIEW

India is experiencing rapid economic growth, it is currently the world’s fifth-largest economy, and is projected to rank third by 2027. Currently it has a nominal GDP of approximately USD 3.9 trillion in 2024. India faces severe environmental issues, such as air and water pollution, deforestation, and waste management, with 63 of the world’s 100 most polluted cities located here. Socially, India is marked by immense diversity, with various ethnic, linguistic, religious, and cultural groups coexisting.

ECONOMIC

India continues to lead global growth, with an 8.2% GDP expansion in 2024, driven by domestic demand and government spending. Growth for 2025 is forecast at 6.4-6.5%, with easing inflation. Unemployment decreased to 3.2% in 2023-24. Challenges include global slowdown, inflation management, and structural issues like job creation and inequality. India’s economy, the fifth largest globally, is expected to be third by 2027. Opportunities stem from its large market, favourable demographics, and strong foreign direct investment, with key risks around youth unemployment and inequality.

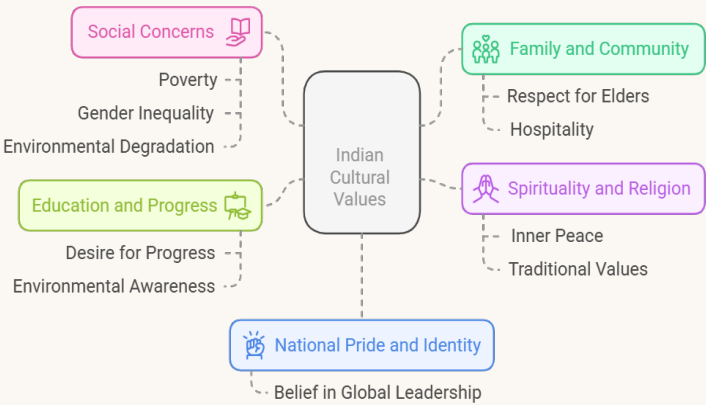
ENVIRONMENT

India faces severe environmental challenges, including air pollution (1.2 million premature deaths in 2019) and water stress, with 63 of the world’s 100 most polluted cities in 2021. New Delhi has the worst air quality among global capitals. Despite low historical per capita emissions, India’s total emissions are growing due to development and coal reliance. Biodiversity is under threat from habitat destruction, deforestation, and climate change. India targets a 45% reduction in emissions intensity by 2030 and net-zero by 2070. Opportunities lie in renewable energy, green hydrogen, and domestic manufacturing, though challenges include financing, coal phase-down, and water issues. Environmental degradation is closely tied to social inequality, with vulnerable populations most affected.

SOCIETY & CULTURE

India, with a population exceeding 1.46 billion and a median age of 28, is a nation of vast diversity (linguistic, religious, and ethnic). Although poverty has decreased, income inequality, gender disparity, and caste discrimination remain significant challenges. Population growth has slowed, with fertility below replacement level, while aging (60+ expected to rise from 7% in 2009 to 20% by 2050) and urbanisation continue. Youth, heavily influenced by social media, could contribute to a demographic dividend if skilled. However, challenges persist in addressing inequality, gender/caste disparities, creating quality jobs, and ensuring equitable access to education and healthcare.

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: Indian total respondents (n = 105); Indian holiday respondents (n = 46)

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.

MARKET CONTEXT INSIGHTS

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