



MARKET INSIGHTS GUIDES

United Kingdom

**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.

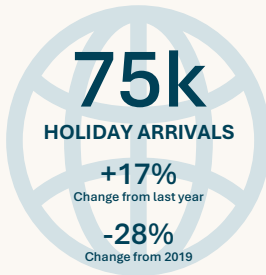
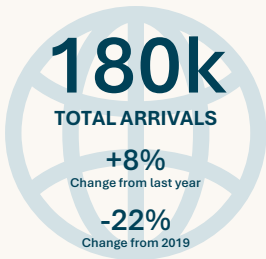
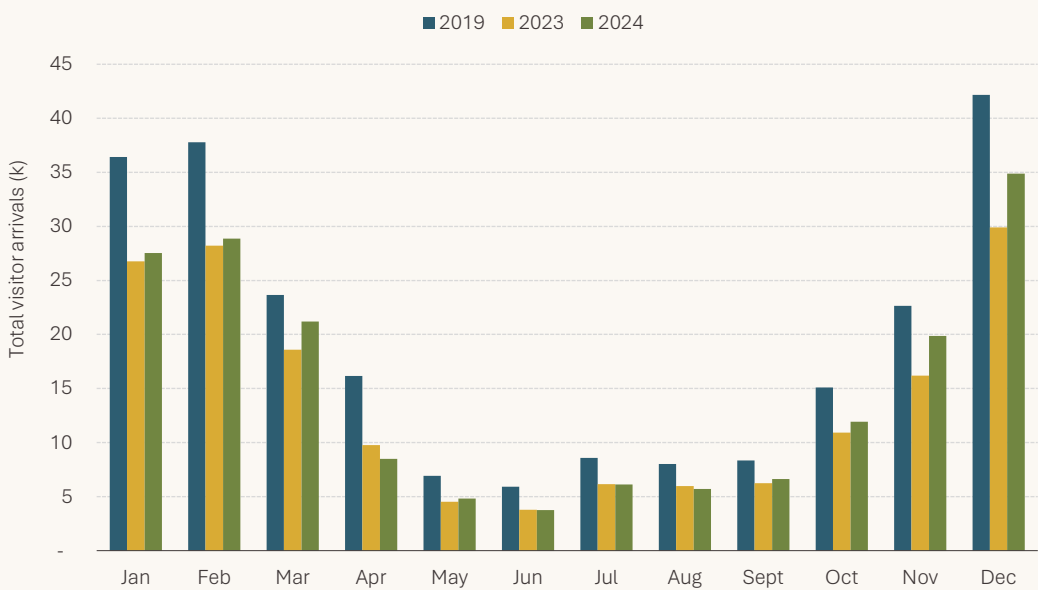


NEW ZEALAND TRAVEL INSIGHTS

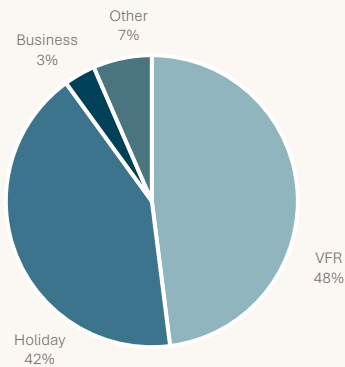
INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 179,868 international visitor arrivals from the UK, accounting for 5.4% of total international arrivals and making China New Zealand’s fourth largest international visitor market. Of these, 75,444 were holiday visitors, representing 42% of total UK arrivals.

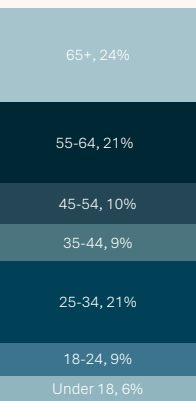
INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2023 AND 2024)







PURPOSE OF VISIT



AGE BREAKDOWN



SEASONALITY

	TOTAL	HOLIDAY
	52.4%	53.1%
	18.6%	16.9%
	8.4%	6.4%
	20.5%	23.7%



NEW ZEALAND TRAVEL INSIGHTS

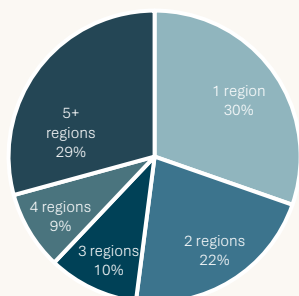
NEW ZEALAND TRIP INSIGHTS

38% of UK visitors travelled to more than four regions in NZ. They spent approximately \$941 million, including \$458 million by holidaymakers. Average spend per trip was \$5,756, rising to \$7,263 for holiday visitors. Length of stay total is 38 days, with a shorter length of stay of 33 days for holiday visitors.

REGIONAL VISITATION

38%

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

30%

QUEENSTOWN

16%

WĀNAKA

Holiday visitors that stayed in

55%

QUEENSTOWN

21%

WĀNAKA

SPEND (\$M)

\$941m

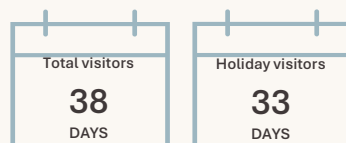
TOTAL MARKET SPEND



Total visitors
\$5,756
AVERAGE SPEND PER TRIP

Holiday visitors
\$7,263
AVERAGE HOLIDAY SPEND PER TRIP

LENGTH OF STAY



TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



I've always wanted to visit



Visiting friends and family that live in NZ



It was somewhere new, I had never been there before



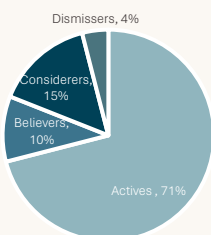
The variety of outdoor and adventure activities

SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

SUSTAINABILITY MINDSET

81%

ACTIVE OR BELIEVERS



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

CURRENT SUSTAINABLE TRAVEL CHOICES



79%

are willing to invest time and money to make sustainable choices

FUTURE SUSTAINABLE TRAVEL CHOICES



87%

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



More time consuming, less convenient

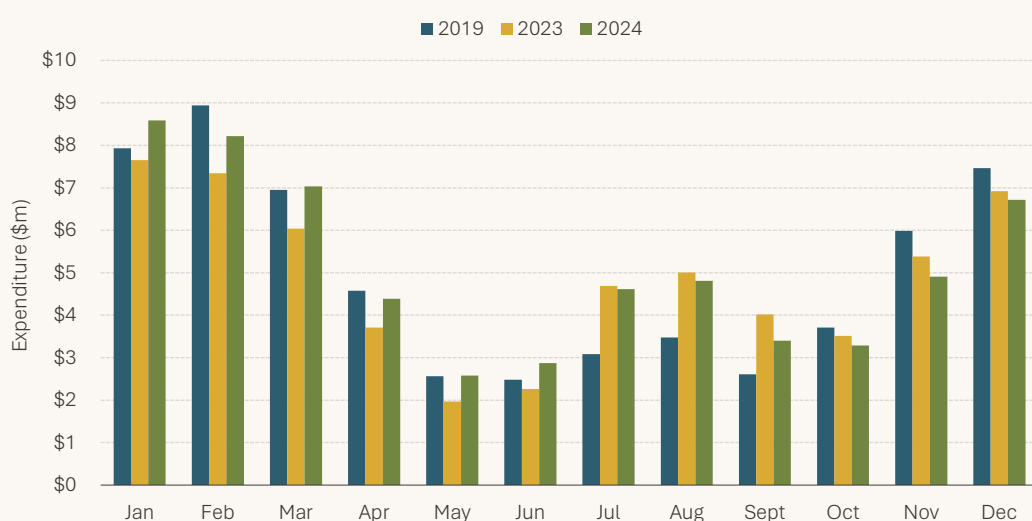


QUEENSTOWN LAKES TRAVEL INSIGHTS

TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from the UK market in the Queenstown Lakes reached \$61.4m, accounting for 9.5% of total international expenditure.

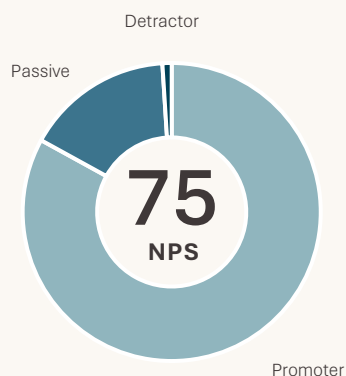
EXPENDITURE (\$M) BY MONTH (2019 AND 2023 COMPARED TO 2024)



VISITOR EXPERIENCE INSIGHTS

Queenstown Lakes boasts a Net Promoter Score (NPS) of +75 over the past 12 months from UK 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



4.2

AVERAGE NUMBER OF LOCATIONS VISITED

85%	Queenstown town centre
63%	Wānaka town centre
50%	Arrowtown
42%	Frankton
36%	Lake Hāwea
33%	Cardrona Valley
32%	Glenorchy
20%	Arthur's Point
15%	Lake Hayes
14%	Gibbston Valley
12%	Glendhu Bay + surrounds
11%	Kingston
10%	Makarora + surrounds
8%	Kelvin Heights/Peninsula
6%	Luggate

ACTIVITIES UNDERTAKEN



5.3

AVERAGE NUMBER OF ACTIVITIES UNDERTAKEN

Top Activities



81%

Walking / hiking



46%

Lake cruising and river activities



23%

Adrenaline activities

84%

Restaurants and cafés

81%

Walking and hiking

64%

Shopping

60%

Sightseeing

46%

Lake cruising and river activities

38%

Bars/nightclubs

23%

Adrenaline activities

22%

Art galleries, museums, historic buildings or sites

21%

Cycling/biking

19%

Cultural or heritage experiences

14%

Wineries or other wine experiences

11%

Land activities

9%

Ski, snow, ice activities

8%

Flying/air activities

8%

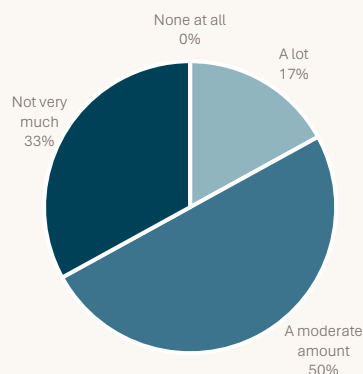
Wellness experiences

7%

Farm, animal or nature experience

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



Connecting with locals and understanding their way of life

TOP SUSTAINABLE TRAVEL BEHAVIOURS TAKEN IN REGION



Limited my environmental impact by reducing excess waste (e.g. by avoiding single-use plastics)



Explored the local area and attractions more than most other visitors would



Slowed down and stayed longer than most other visitors



Reduced carbon emissions public transport, walking/ cycling to get around



MARKET CONTEXT INSIGHTS

OVERVIEW

The UK is characterised by a strong sense of community and an increasing focus on work-life balance. While climate change and biodiversity loss remain challenges, public support for sustainability is rising. Socially, concerns around inequality, healthcare, and housing persist, but opportunities exist to enhance social equity and invest in key services. Economically, the UK remains a global trading power but faces slow growth, inflation, and a cost of living crisis. The IMF projects 1.6% GDP growth in 2025, with inflation at 3.7% by mid-year and unemployment rising to 4.6% by year-end.

ECONOMIC

The UK economy has slowed, with growth dropping from 4.0% in 2022 to 0.4% in 2023, due to high inflation and reduced spending. A late 2023 recession created uncertainty, but Q4 2024 saw slight growth, with 2024 projected at 0.9%. The UK remains a net oil importer, adding complexity to its economic landscape. Despite challenges, the economy is expected to grow 1.7% in 2025, showing early recovery signs in early 2025. However, growth forecasts have been revised down due to global uncertainties, and challenges like rising business costs and Brexit persist.

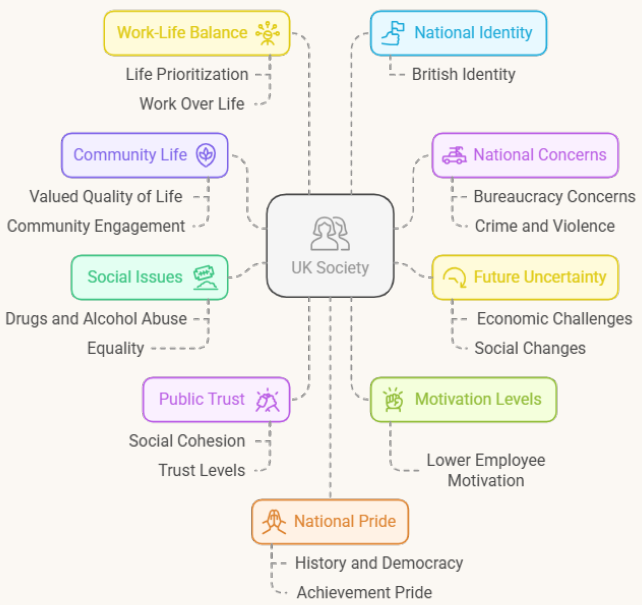
ENVIRONMENT

The UK aims for net-zero by 2050, with interim cuts of 68% by 2030 (vs 1990 levels). Emissions dropped by 50% by 2023, primarily from coal phase-out, but progress in transport and buildings is slow. While marine protection expanded, biodiversity targets were missed. The Climate Change Act (2008) and Environment Act (2021) set frameworks, but policy rollbacks hinder progress. Key challenges include accelerating renewables, electrifying transport, decarbonising industry, and addressing biodiversity loss. Household emissions remain the largest source, highlighting the need for greater adoption of sustainable practices like energy efficiency and waste reduction.

SOCIETY & CULTURE

The UK, with a population of approximately 67.6m, is increasingly diverse, though White British remains the majority (~77%). Public satisfaction with the NHS and trust in government are at record lows. Migration drives population growth, projected to reach 70m by 2026, while the aging population (65+ share rising from 19% in 2022 to 27% by 2072) presents challenges. Social attitudes have liberalised on some issues, though immigration remains contentious. Brexit continues to influence national identity. Opportunities exist in diversity, but challenges include inequality, social cohesion, and public service dissatisfaction.

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: UK total respondents (n = 1197); UK holiday respondents (n = 567)

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 UK respondents (n = 107).

MARKET CONTEXT INSIGHTS

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