

 Wānaka

Queenstown  
NEW ZEALAND



# MARKET INSIGHTS GUIDES

United States of America



**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.

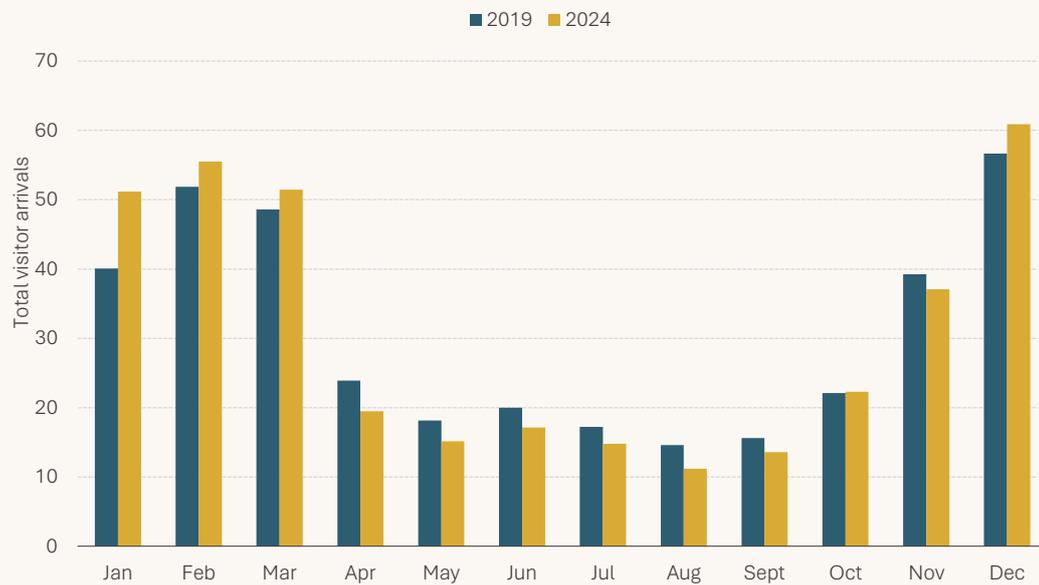


# NEW ZEALAND TRAVEL INSIGHTS

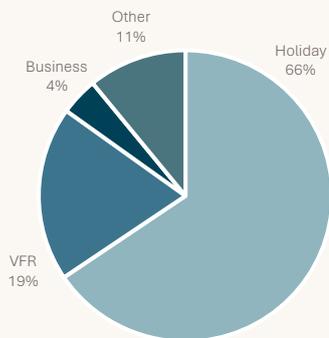
## INTERNATIONAL VISITOR ARRIVALS INSIGHTS

In 2024, New Zealand welcomed 370,212 international visitor arrivals from the United States, accounting for 11.8% of total international arrivals and making the USA New Zealand's second-largest international visitor market. Of these, 242,490 were holiday visitors, representing 66% of total USA arrivals.

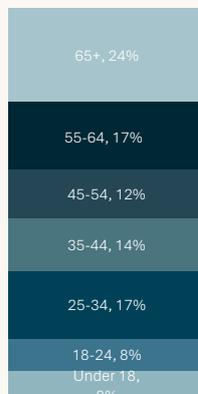
### INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2024)



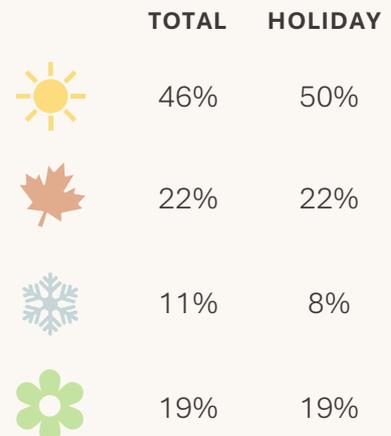
### PURPOSE OF VISIT



### AGE BREAKDOWN



### SEASONALITY





# NEW ZEALAND TRAVEL INSIGHTS

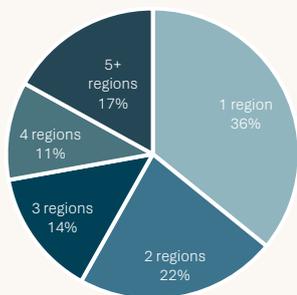
## NEW ZEALAND TRIP INSIGHTS

28% of US visitors travelled to more than four regions in NZ. They spent \$1.7 billion, including \$1.1 billion by holidaymakers. Average spend per trip was \$5,158, rising to \$5,637 for holiday visitors. Length of stay total is 17 days, with a length of stay of 14 days for holiday visitors

### REGIONAL VISITATION

**28%**

OF VISITORS STAY A NIGHT IN 4+ REGIONS



Total visitors that stayed in

**33%**

QUEENSTOWN

**9%**

WĀNAKA

Holiday visitors that stayed in

**44%**

QUEENSTOWN

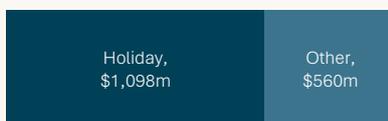
**10%**

WĀNAKA

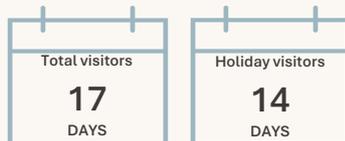
### SPEND (\$M)

**\$1.7B**

TOTAL MARKET SPEND



### LENGTH OF STAY



### TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND



Its landscapes & scenery



I've always wanted to visit



It was somewhere new, I had never been there before



The variety of outdoor and adventure activities



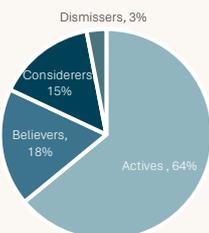
The Hobbit and Lord of the Ring Movies

## SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

### SUSTAINABILITY MINDSET

**82%**

ACTIVE OR BELIEVERS



82% of Americans who find NZ an appealing holiday destination fall into Kantar's sustainability segments of Actives or Believers, higher than the American average of 53%.

### CURRENT SUSTAINABLE TRAVEL CHOICES



**86%**

are willing to invest time and money to make sustainable choices

### FUTURE SUSTAINABLE TRAVEL CHOICES



**86%**

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



More time consuming, less convenient



Hard to identify if operations are sustainable

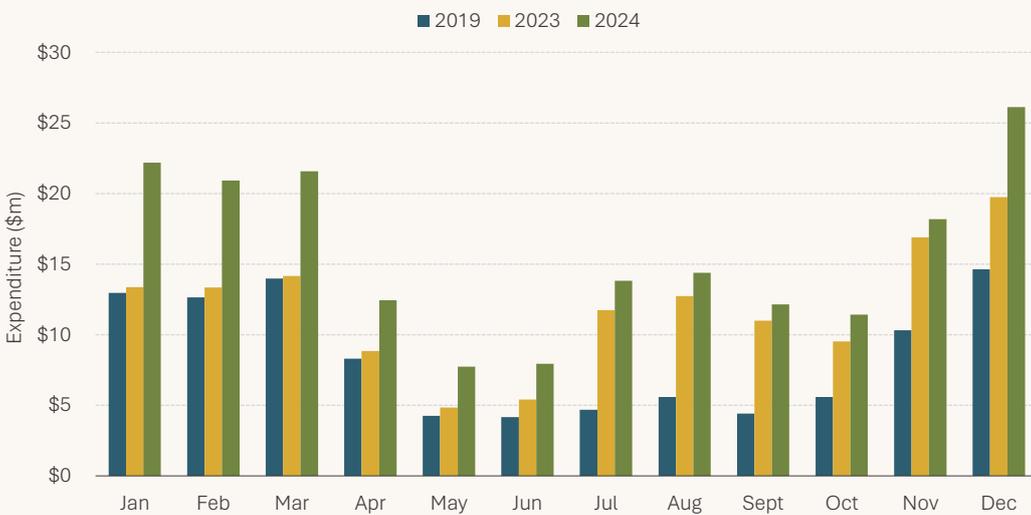


# QUEENSTOWN LAKES TRAVEL INSIGHTS

## TOURISM RELATED EXPENDITURE INSIGHTS

In 2024, total visitor expenditure from the American market in the Queenstown Lakes reached \$189m, accounting for 29% of total international expenditure and making USA the Queenstown Lakes largest international visitor expenditure market.

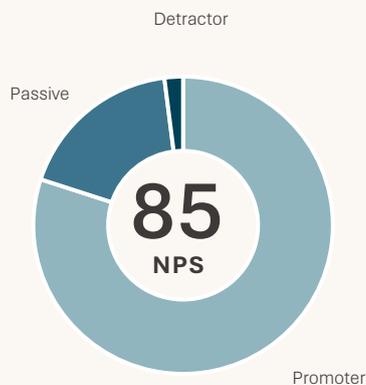
### EXPENDITURE (\$M) BY MONTH (2019 COMPARED TO 2024)



## VISITOR EXPERIENCE INSIGHTS

Queenstown Lakes boasts an impressive Net Promoter Score (NPS) of +85 over the past 12 months from the USA market indicating a strong advocacy for the region as a destination.

### NET PROMOTER SCORE



### TOP MOTIVATIONS FOR VISITING THE QUEENSTOWN LAKES DISTRICT





# QUEENSTOWN LAKES TRAVEL INSIGHTS

## VISITOR EXPERIENCE INSIGHTS

### LOCATIONS VISITED



87%	Queenstown town centre
50%	Wānaka town centre
43%	Arrowtown
27%	Glenorchy
24%	Frankton
22%	Gibbston Valley
21%	Lake Hāwea
17%	Cardrona Valley
11%	Arthur's Point
11%	Glendhu Bay + surrounds
8%	Lake Hayes
7%	Makarora + surrounds
4%	Kingston
2%	Kelvin Heights

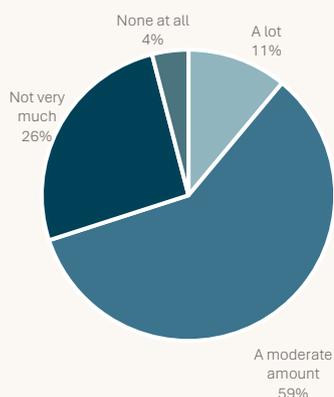
### ACTIVITIES UNDERTAKEN



<b>Top Activities</b>	<b>89%</b>	Walking/ hiking
	<b>81%</b>	Restaurants and cafés
<b>89%</b>	<b>52%</b>	Shopping
Walking / hiking	<b>48%</b>	Lake cruising and river activities
	<b>30%</b>	Wineries or other wine experiences
<b>48%</b>	<b>26%</b>	Bars/nightclubs
Lake cruising and river activities	<b>19%</b>	Adrenaline activities
	<b>19%</b>	Cycling/biking
<b>30%</b>	<b>11%</b>	Community event/giving back to the region
Wineries or other wine experiences	<b>11%</b>	Flying/air activities
	<b>11%</b>	Land activities
	<b>7%</b>	Cultural or heritage experiences
	<b>7%</b>	Ski, snow, ice activities
	<b>4%</b>	Art galleries, museums, historic buildings
	<b>4%</b>	Farm, animal or nature experience
	<b>4%</b>	Wellness experiences

## SUSTAINABLE TRAVEL ATTITUDES AND BEHAVIOURS

### INTERACTION WITH LOCALS



### TOP SUSTAINABLE TRAVEL ATTITUDES HELD

- Leaving places better than they were when you arrived
- Respecting and preserving local cultural heritage and traditions of a destination
- Protecting and restoring the local environment at a destination
- Connecting with locals and understanding their ways of life

### TOP SUSTAINABLE TRAVEL BEHAVIOURS TAKEN IN REGION

- Reduced carbon emissions public transport, walking/ cycling to get around
- Explored the local area and attractions more than most other visitors would
- 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



# MARKET CONTEXT INSIGHTS

## OVERVIEW

The USA, a global leader with a dynamic economy, is unique for its blend of innovation, multiculturalism, and influence across various sectors. Looking ahead to 2025, the economic outlook is mixed, with moderate growth expected amid challenges such as inflation, high interest rates, and global uncertainty. Political instability surrounding the current administration may add complexity and influence global geopolitical tensions.

## ECONOMIC

The US economy grew 2.3–2.8% in 2024 but contracted 0.3% in Q1 2025. Inflation remains above target (CPI 2.4%, core 2.8%), and unemployment has edged up to 4.2%. New tariffs - up to 145% on Chinese goods and 25% on steel - have disrupted trade and raised costs, fuelling economic uncertainty. Retaliation from key partners adds to instability. A slowdown is expected in 2025 (GDP +1.8–1.9%), with inflation and trade tensions likely to delay Fed rate cuts. Still, the US benefits from its large domestic market and potential AI-driven productivity gains, offering cautious optimism amid mounting headwinds.

## ENVIRONMENT

The United States is a major emitter of greenhouse gases, with high per-person emissions and reliance on fossil fuels. Overall emissions fell 19% from 2005 to 2022, but rose in 2022. Key sectors include transport, power, and industry. The US aims for a 50-52% net GHG cut by 2030, but projections suggest only a 29–39% cut. Policies like the Inflation Reduction Act and infrastructure upgrades aim to speed the transition, but challenges remain, including grid modernisation, methane, and political division. The country also faces significant biodiversity loss and climate impacts, such as extreme weather and uneven rainfall.

## SOCIETY & CULTURE

The US, with a population of over 333 million, is increasingly diverse, with non-Hispanic White individuals making up less than 60%. Ethnic minority groups are growing rapidly, and by 2055, no single racial or ethnic majority is projected. High income inequality, deep political polarisation, and an aging population (65+ making up 17.3% in 2022) create challenges. Immigration is the main growth driver as fertility rates remain low. While diversity strengthens the nation, it also strains social cohesion. Managing inequality, rebuilding trust, and fostering inclusivity are key to ensuring a more equitable and united future.

## 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 USA respondents (n = 1101); holiday USA 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 USA respondents (n = 103).

## MARKET CONTEXT INSIGHTS

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