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.
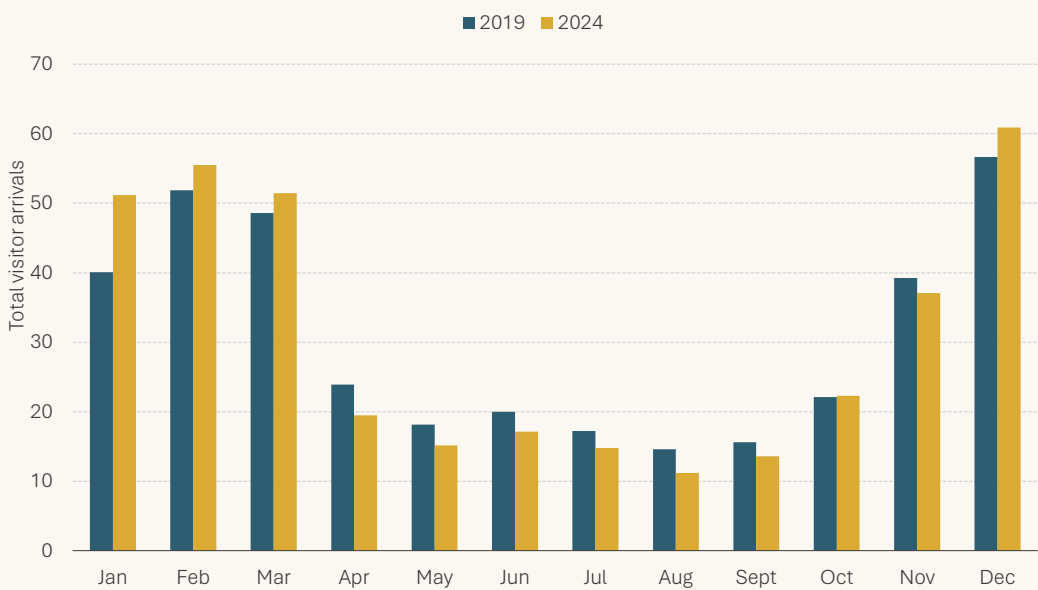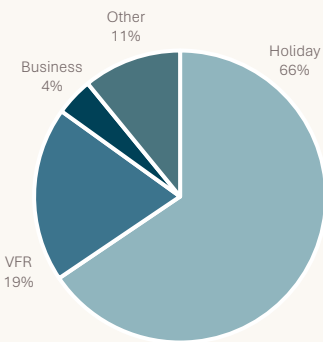
NEW ZEALAND TRAVEL INSIGHTS

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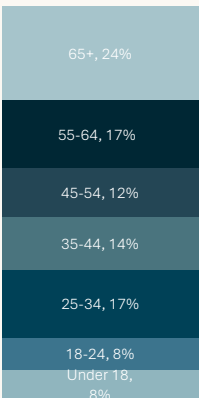
INTERNATIONAL VISITOR ARRIVALS BY MONTH (2019 COMPARED TO 2024)

■ 2019 ■ 2024

370k
TOTAL ARRIVALS
+10%
Change from last year
+5%
Change from 2019

242k
HOLIDAY ARRIVALS
+3%
Change from last year
+0%
Change from 2019

PURPOSE OF VISIT

Other 11%
Business 4%
Holiday 66%
VFR 19%

AGE BREAKDOWN

65+, 24%
55-64, 17%
45-54, 12%
35-44, 14%
25-34, 17%
18-24, 8%
Under 18, 8%

SEASONALITY

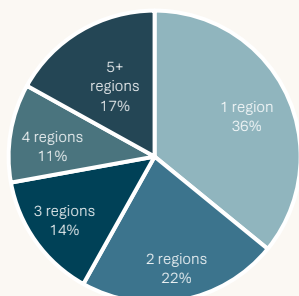|	TOTAL	HOLIDAY
☀	46%	50%
🍁	22%	22%
❄	11%	8%
❀	19%	19%
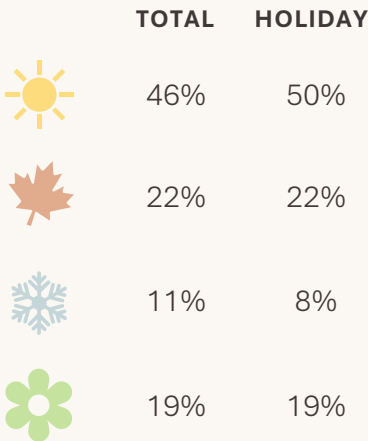
NEW ZEALAND TRAVEL INSIGHTS

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

Pie chart:
- 1 region 36%
- 2 regions 22%
- 3 regions 14%
- 4 regions 11%
- 5+ regions 17%

Total visitors that stayed in

33% **9%**
QUEENSTOWN WĀNAKA

Holiday visitors that stayed in

44% **10%**
QUEENSTOWN WĀNAKA

SPEND ($M)

$1.7B
TOTAL MARKET SPEND

Holiday, $1,098m	Other, $560m
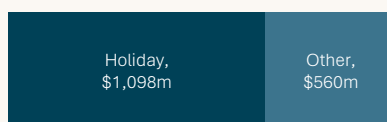
Total visitors
$5,158
AVERAGE SPEND PER TRIP

Holiday visitors
$5,637
AVERAGE HOLIDAY SPEND PER TRIP

LENGTH OF STAY

Total visitors
17 DAYS

Holiday visitors
14 DAYS
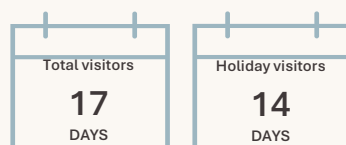
TOP FIVE MOTIVATORS FOR VISITING NEW ZEALAND

- Its landscapes & scenery
- I've always wanted to visit
- It was somewhere new, I had never been there before
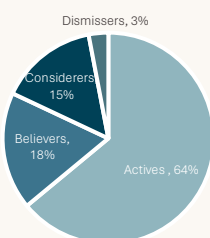- The variety of outdoor and adventure activities
- The Hobbit and Lord of the Ring Movies

SUSTAINABILITY AND TRAVEL FOR TRAVELLERS INTERESTED IN NZ

SUSTAINABILITY MINDSET

82%
ACTIVE OR BELIEVERS

Pie chart:
- Dismissers, 3%
- Considerers, 15%
- Believers, 18%
- Actives, 64%

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 $189m, accounting for 29% of total international expenditure and making USA the Queenstown Lakes largest international visitor expenditure market.
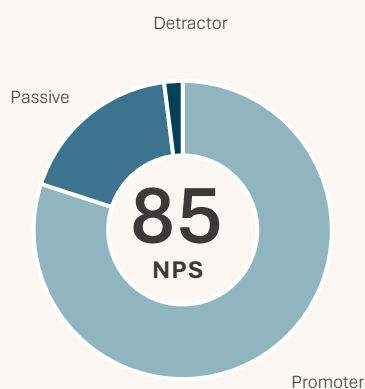
EXPENDITURE ($M) BY MONTH (2019 COMPARED TO 2024)

Legend: ■ 2019 ■ 2023 ■ 2024

$189m
TOTAL
+33%
Change from last year
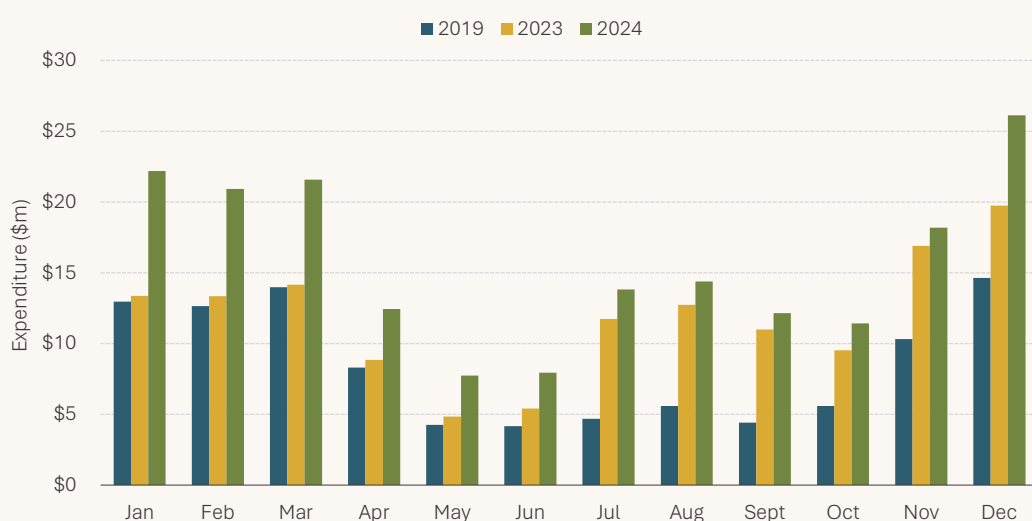
VISITOR EXPERIENCE INSIGHTS

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

Detractor
Passive
Promoter

85
NPS

TOP MOTIVATIONS FOR VISITING THE QUEENSTOWN LAKES DISTRICT

Motivation	%
Enjoy stunning natural scenery	73%
Explore a new place and experience new things	67%
Experience the many tourism activities and attractions	53%
Experience challenge and excitement	43%
Visit a well-known destination	37%
Recharge and unwind	37%
Participate in sport / activity (e.g. golf, skiing or hiking)	34%
Good weather or a particular season	29%
Enjoy the local food and drink	28%
Visit a safe destination	18%

QUEENSTOWN LAKES TRAVEL INSIGHTS

VISITOR EXPERIENCE INSIGHTS

LOCATIONS VISITED

3.3
AVERAGE NUMBER OF 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

4.8
AVERAGE NUMBER OF ACTIVITIES UNDERTAKEN

Top Activities

89%
Walking / hiking

48%
Lake cruising and river activities

30%
Wineries or other wine experiences

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

SUSTAINABLE TRAVEL ATTITUDES AND BEHAVIOURS

INTERACTION WITH LOCALS

None at all 4%
A lot 11%
Not very much 26%
A moderate amount 59%
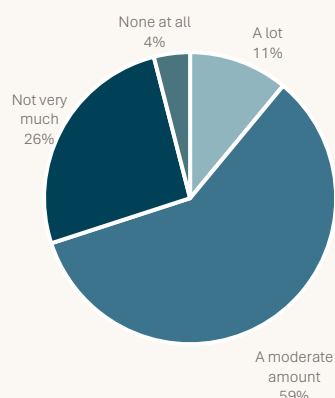
TOP SUSTAINABLE TRAVEL ATTITUDES HELD

- 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.

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.
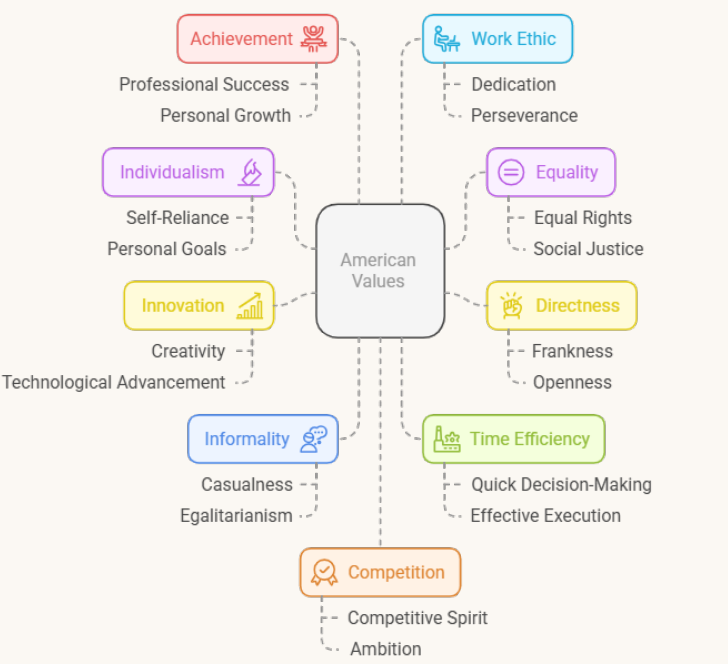
ENVIRONMENT

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.

VALUES AND MOTIVATIONS.

American Values

- **Achievement**
  - Professional Success
  - Personal Growth
- **Work Ethic**
  - Dedication
  - Perseverance
- **Individualism**
  - Self-Reliance
  - Personal Goals
- **Equality**
  - Equal Rights
  - Social Justice
- **Innovation**
  - Creativity
  - Technological Advancement
- **Directness**
  - Frankness
  - Openness
- **Informality**
  - Casualness
  - Egalitarianism
- **Time Efficiency**
  - Quick Decision-Making
  - Effective Execution
- **Competition**
  - Competitive Spirit
  - Ambition

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 Marketveiw 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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