

INDIA

Visitor & Market Insights

July 2026

TOURISM NEW ZEALAND'S MARKET APPROACH

Our Purpose

Enrich Aotearoa New Zealand and all who visit.

- Tourism must enrich New Zealand and the wellbeing of New Zealanders – contributing more than what it takes.
- Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud.

Our Role

To promote New Zealand as a visitor destination to key markets around the world. Tourism New Zealand's strategy is focused on driving year-round arrivals to support economic growth.

Market Approach

Tourism New Zealand (TNZ) focuses on shaping the visitor mix through activity across a diverse portfolio of markets.

Our markets are determined by factors including there being an existing or potential group of people actively considering New Zealand as a destination.

Active Considerers

These are international holiday travellers, aged 18-74, who find New Zealand highly appealing. New Zealand is among their top 5 preferred destinations to visit, they have serious intentions to visit in the next 3 years, and they have a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverages a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Stats NZ's International Visitor Arrivals and MBIE's International Visitor Survey.

Markets

The markets covered in our Snapshots include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom
- India
- Singapore



VISITOR INSIGHTS

International Visitor Arrivals

International arrivals sourced from Stats NZ; includes non-New Zealand or New Zealand residents living overseas who are arriving for a stay of less than 12 months

International Visitor Survey

International Visitor Survey (IVS) commissioned by the Ministry of Business, Innovation and Employment (MBIE); captures survey data from international visitors shortly after their trip to New Zealand

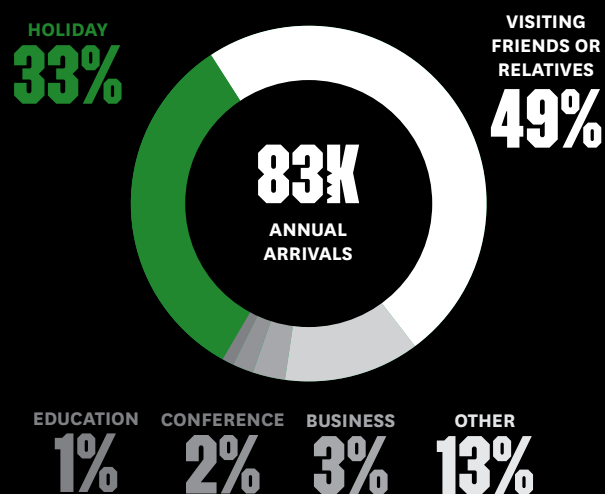
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VISITOR INSIGHTS | ARRIVALS

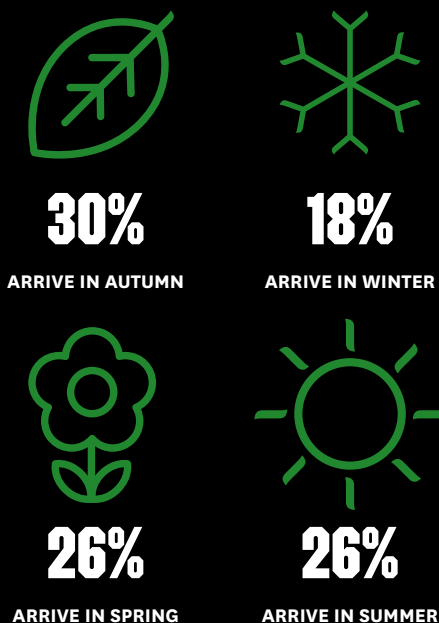


India delivered 83,000 arrivals last year, with visiting friends and relatives accounting for almost half (49%). Holiday travel remains significant (33%), with visitation distributed relatively evenly throughout the year, supporting year-round demand

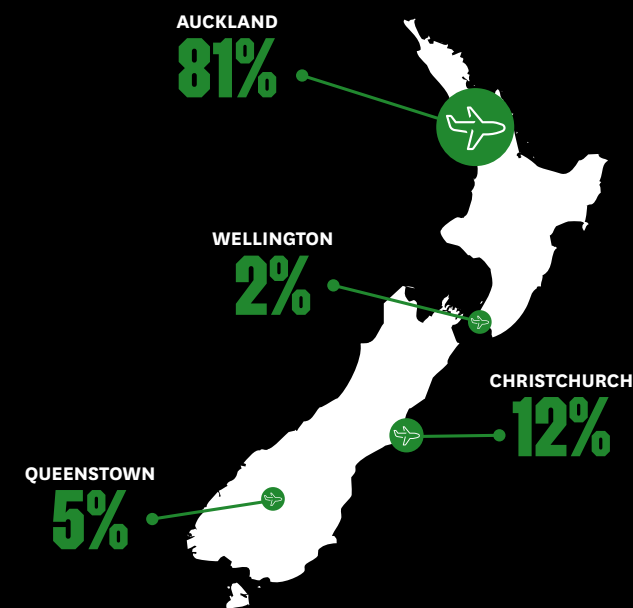
VISITING FRIENDS AND RELATIVES IS THE PRIMARY DRIVER OF INDIAN VISITATION



VISITATION IS SPREAD THROUGHOUT THE YEAR



AUCKLAND IS THE PRIMARY GATEWAY FOR INDIAN VISITORS



Source: Stats NZ International Visitor Arrivals – all arrivals – year ending March 2026

Seasons: Autumn 25/26 (April and May 2025 and March 2026), Winter 25 (June–August 2025), Spring 25 (September–November 2025), and Summer 25/26 (December 2025–February 2026).

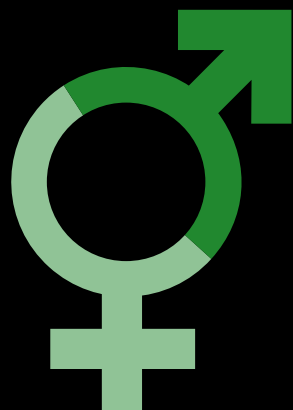
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VISITOR INSIGHTS | WHO THESE HOLIDAYMAKERS ARE



Indian holiday visitors skew older than many markets, with half aged 55 years or older. Travel is primarily undertaken with partners (60%), and most visitors stay for 8–14 days (51%).

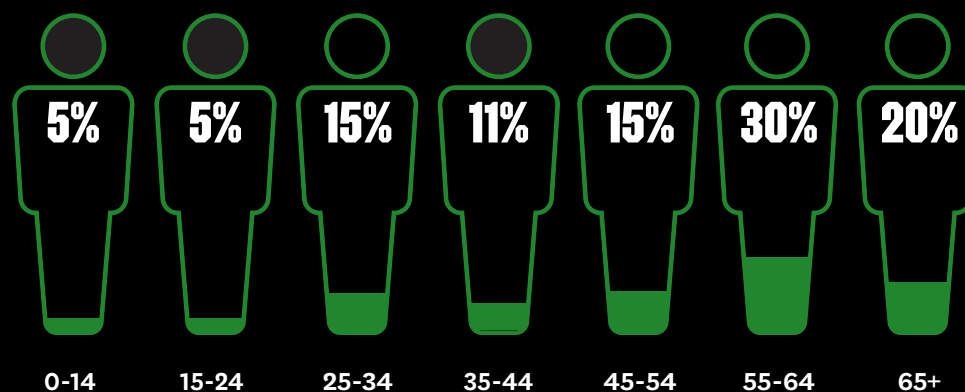
GENDER IS BROADLY
BALANCED, WITH A SLIGHT
SKEW TOWARDS FEMALES



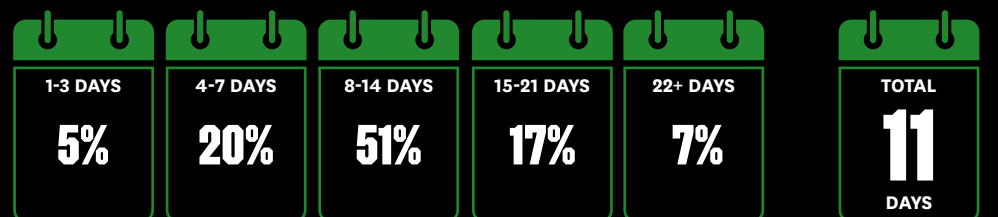
54%
FEMALE

46%
MALE

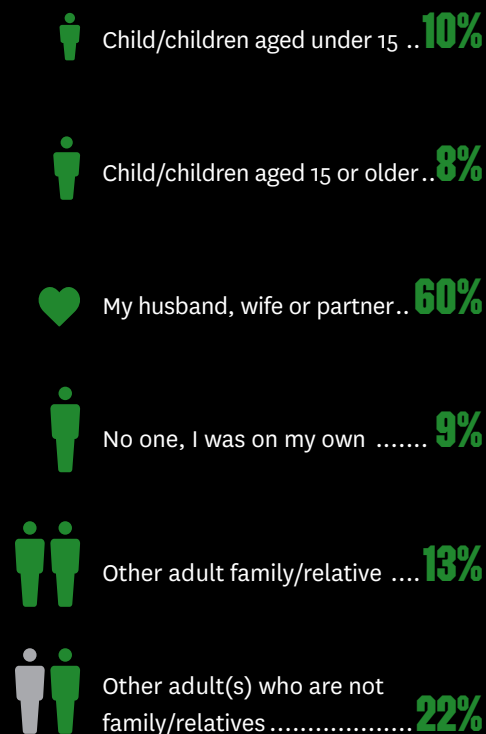
HALF OF VISITORS ARE AGED 55 YEARS OR OLDER



LENGTH OF STAY
(DAYS)



COUPLES ARE THE DOMINANT TRAVEL PARTY,
SUPPORTED BY FAMILY AND GROUP TRAVEL



Less than 0.5% of visitors selected 'Another gender'

Sources: Stats NZ International Holiday Arrivals | Year Ending March 2026

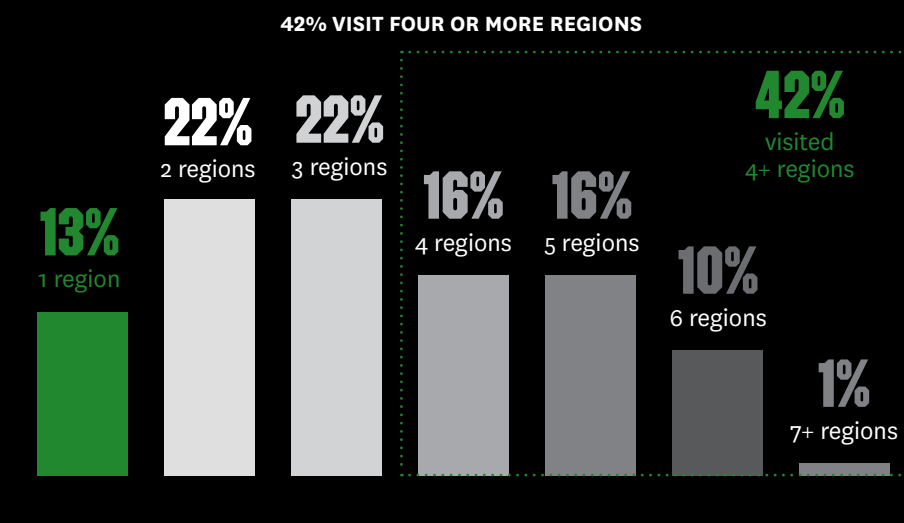
International Visitor Survey | Year ending March 2026 | Holiday Visitors (Travel Party)

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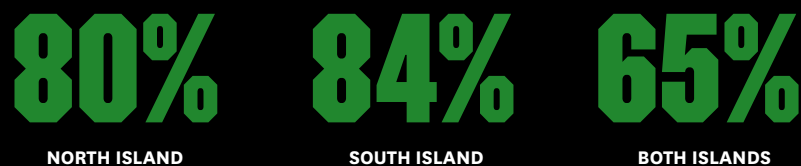
VISITOR INSIGHTS | WHERE THEY GO



Indian holidaymakers travel widely across New Zealand, with 84% visiting the South Island, and 80% visiting the North Island. Nearly two-thirds (65%) explore both islands, and over 40% visit four or more regions

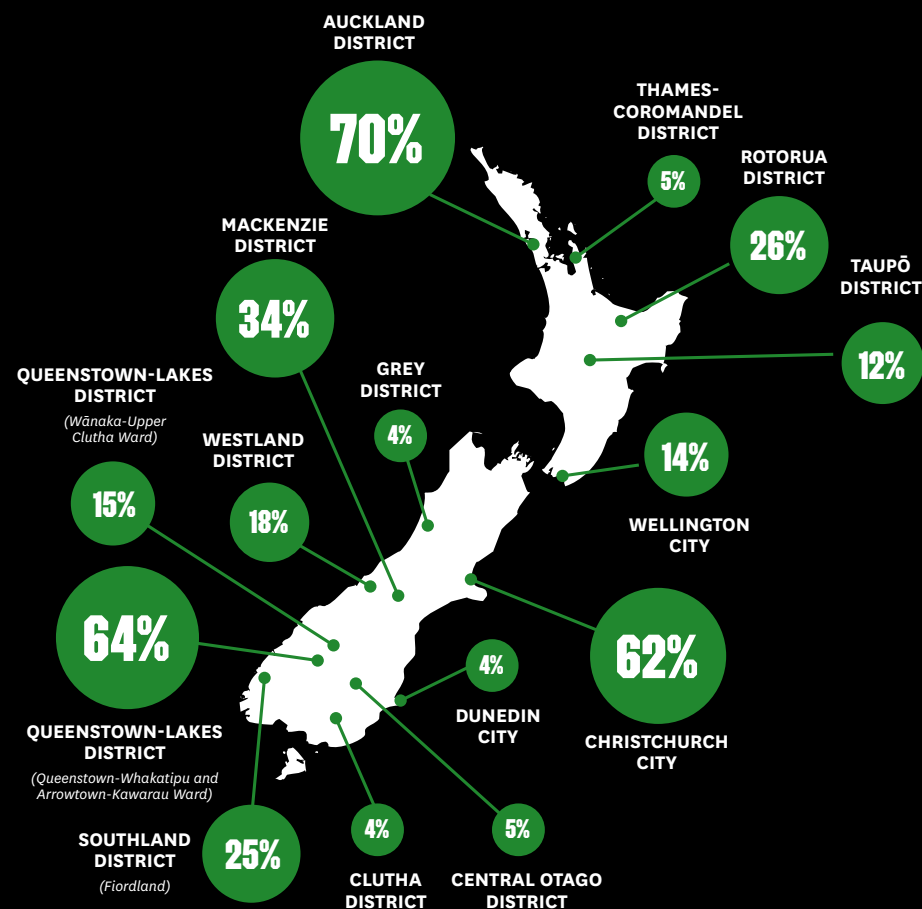


NEARLY TWO-THIRDS EXPLORE BOTH ISLANDS



Source: MBIE, International Visitor Survey | Year ending March 2026 | Holiday Visitors

AUCKLAND, QUEENSTOWN, AND CHRISTCHURCH FORM THE CORE VISITOR CIRCUIT

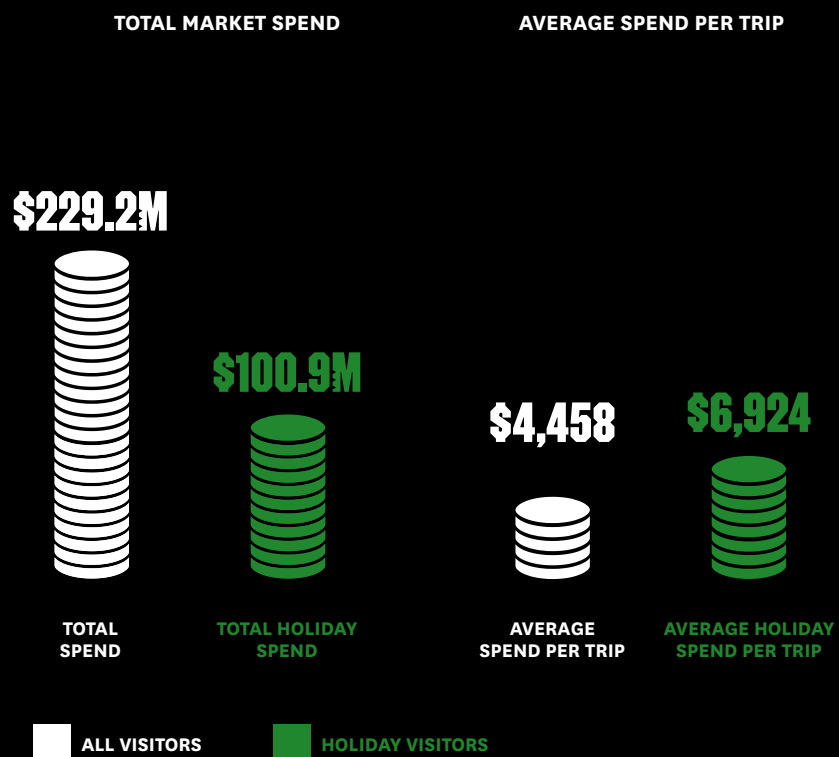


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VISITOR INSIGHTS | HOW MUCH THEY SPEND



Indian visitors contributed NZ\$229 million to the New Zealand economy last year, including NZ\$101 million from holiday travel. Average holiday spend approaches NZ\$7,000 per trip, reflecting the value of this growing market

ACCOMMODATION, ENTERTAINMENT, AND SHOPPING
ACCOUNT FOR OVER HALF OF HOLIDAY EXPENDITURE

ACCOMMODATION



26%

FOOD AND BEVERAGE



8%

SHOPPING



13%

CAR RENTAL



9%

ENTERTAINMENT



14%

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VISITOR INSIGHTS | WHAT THEY DO



Indian holidaymakers are strongly attracted to New Zealand's natural scenery, with mountains, lakes, beaches, national parks, and walking experiences among the most popular activities. Film locations, jet boating, geothermal attractions, and glaciers further enhance the appeal

TOP ACTIVITIES ENJOYED BY INDIANS ON HOLIDAY IN NEW ZEALAND



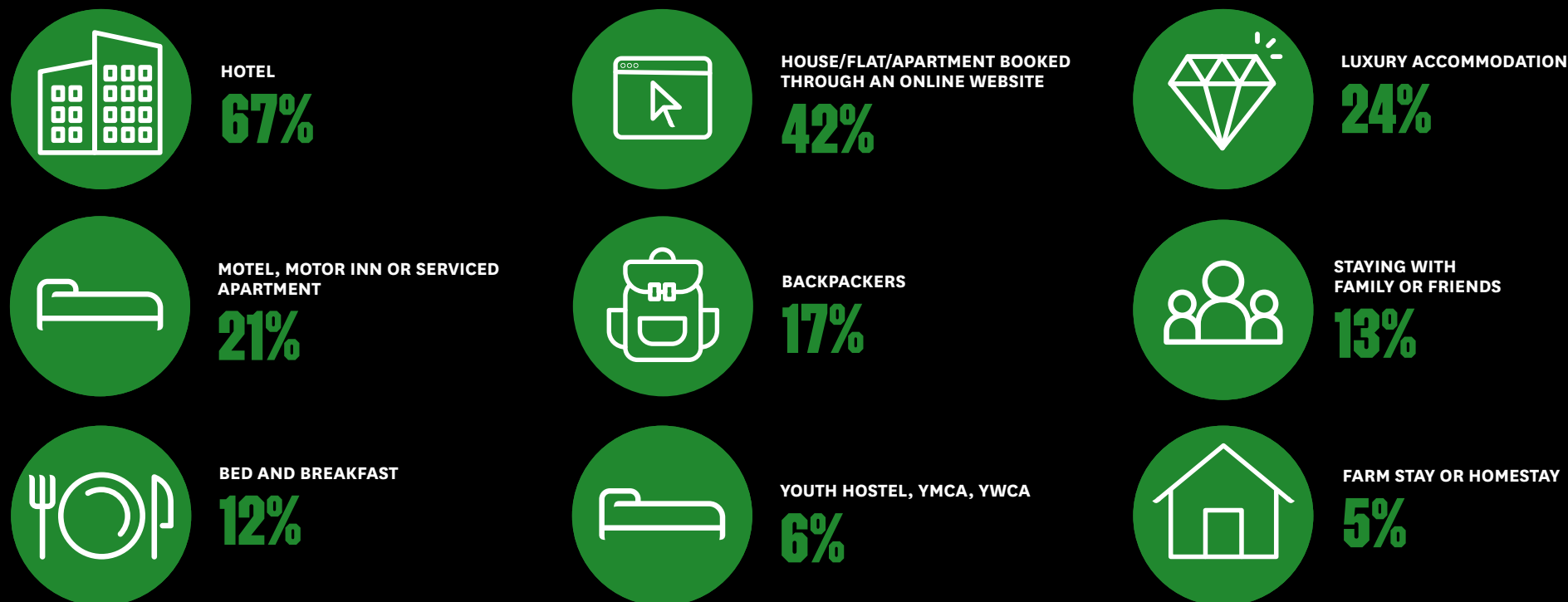
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VISITOR INSIGHTS | WHERE THEY STAY



Hotels are the dominant accommodation choice (67%), while online-booked rentals also play an important role (42%). Luxury accommodation attracts almost a quarter of visitors, highlighting demand for premium experiences

POPULAR ACCOMMODATION TYPES



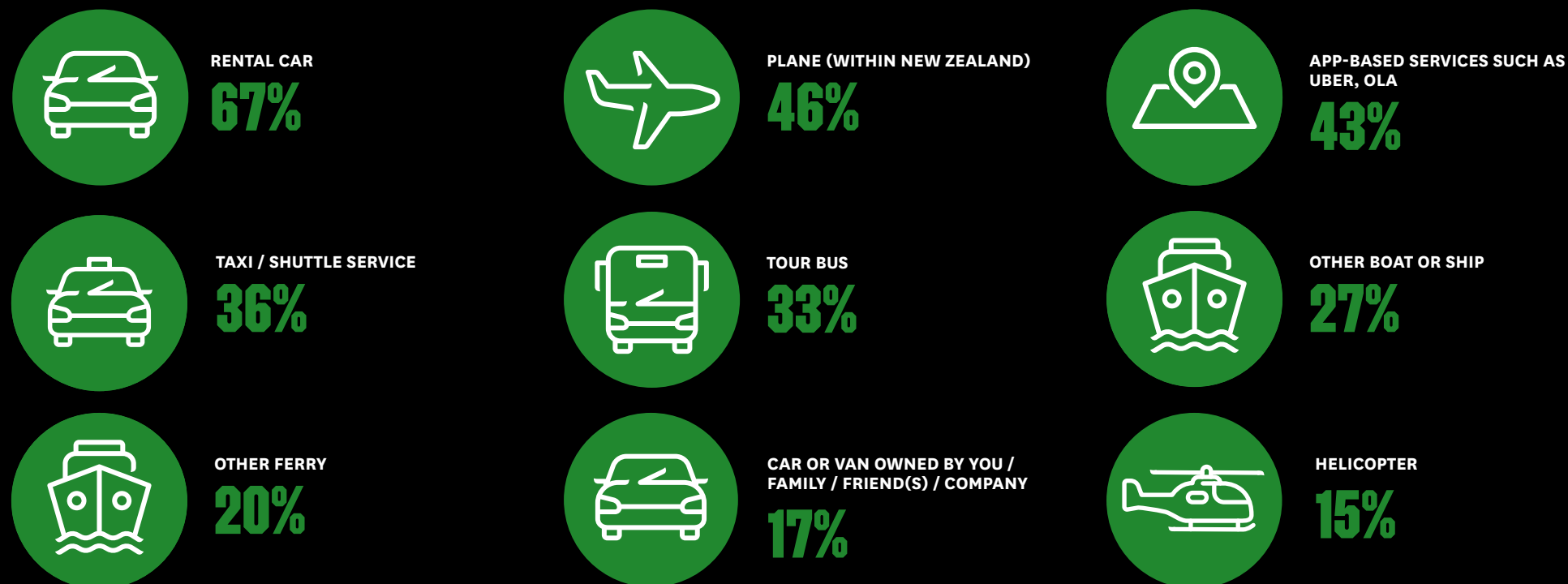
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VISITOR INSIGHTS | HOW THEY TRAVEL



Self-drive and domestic aviation support nationwide exploration, complemented by rideshare services. Tour buses and ferry services also support travel across multiple destinations

HOW THEY TRAVEL



OUR FUTURE TRAVELLERS

Active Considerers

Who qualifies as an Active Considerer?

Active Considerers are travellers who meet all four criteria:

- **High appeal** – Find New Zealand highly appealing as a holiday destination
- **Strong intent** – Would seriously consider visiting in the next three years
- **Destination preference** – Agree that New Zealand is a preferred destination for their next holiday
- **Realistic budget** – Have a minimum spend level aligned to the market

NOTE: In China and India, we do not target the entire online populations, rather we target specific cities.

INDIA**ACTIVE CONSIDERERS | JOURNEY FUNNEL**

An estimated 16 million Indian travellers qualify as Active Considerers, with nearly two-thirds (65%) ranking New Zealand as their preferred destination. Interest extends beyond summer, with more than 80% willing to travel in off-peak periods



82% OFF-PEAK CONSIDERATION*



65% (10M) TOP PREFERENCE** AMONG ACTIVE CONSIDERERS



33% (5M) BOOKING MINDSET***

*Off-Peak Consideration: Would consider travelling during autumn, winter, or spring, in addition to or instead of summer.

**Top Preference: Rank New Zealand as their #1 destination choice

***Booking Mindset: Ready to make firm bookings or have already booked their trip

Source: Active Considerer Monitor data six-month period ending May 2026

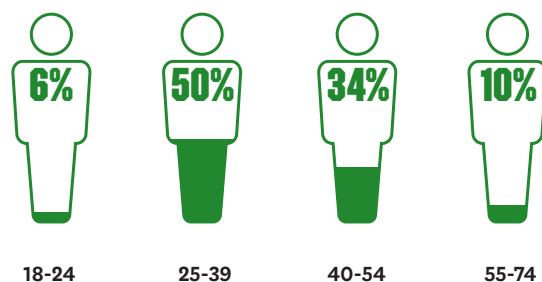
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ACTIVE CONSIDERERS | WHO THEY ARE & WHERE THEY LIVE

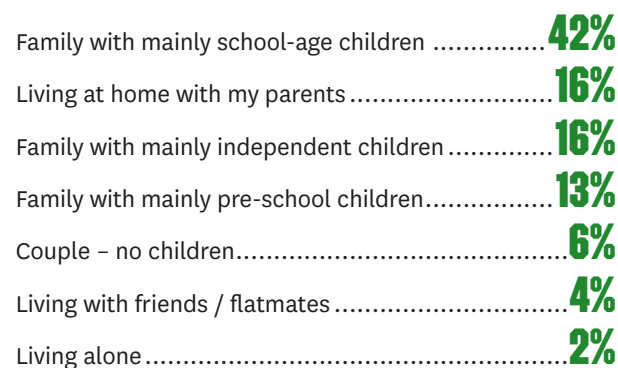


Active Considerers are affluent, family-oriented, and concentrated in major cities. They are predominantly aged 25–54 (84%) with New Delhi and Mumbai as key source regions

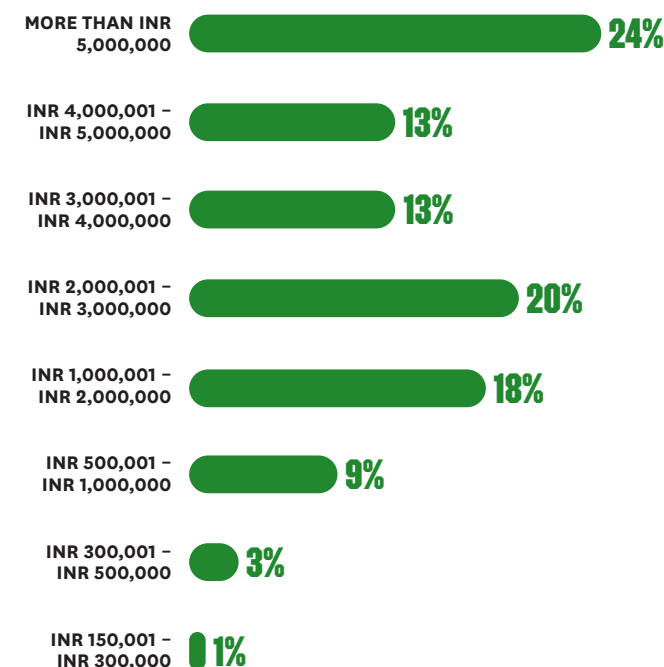
AGE SEGMENT OF ACTIVE CONSIDERERS



FAMILIES ARE THE DEFINING HOUSEHOLD SEGMENT



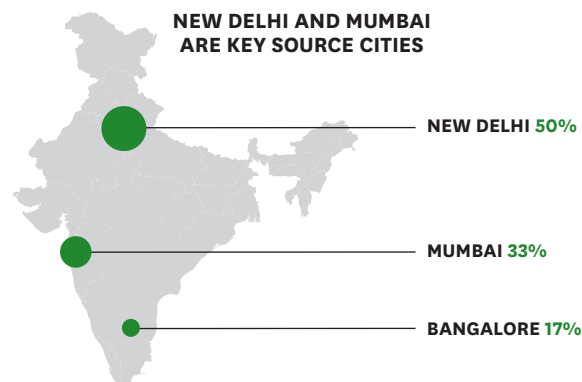
HOUSEHOLD INCOME IS SPREAD WIDELY AMONG ACS



MORE THAN 80% ARE AGED

25-54

NEW DELHI AND MUMBAI ARE KEY SOURCE CITIES



*Doesn't include those selecting 'prefer not to answer'

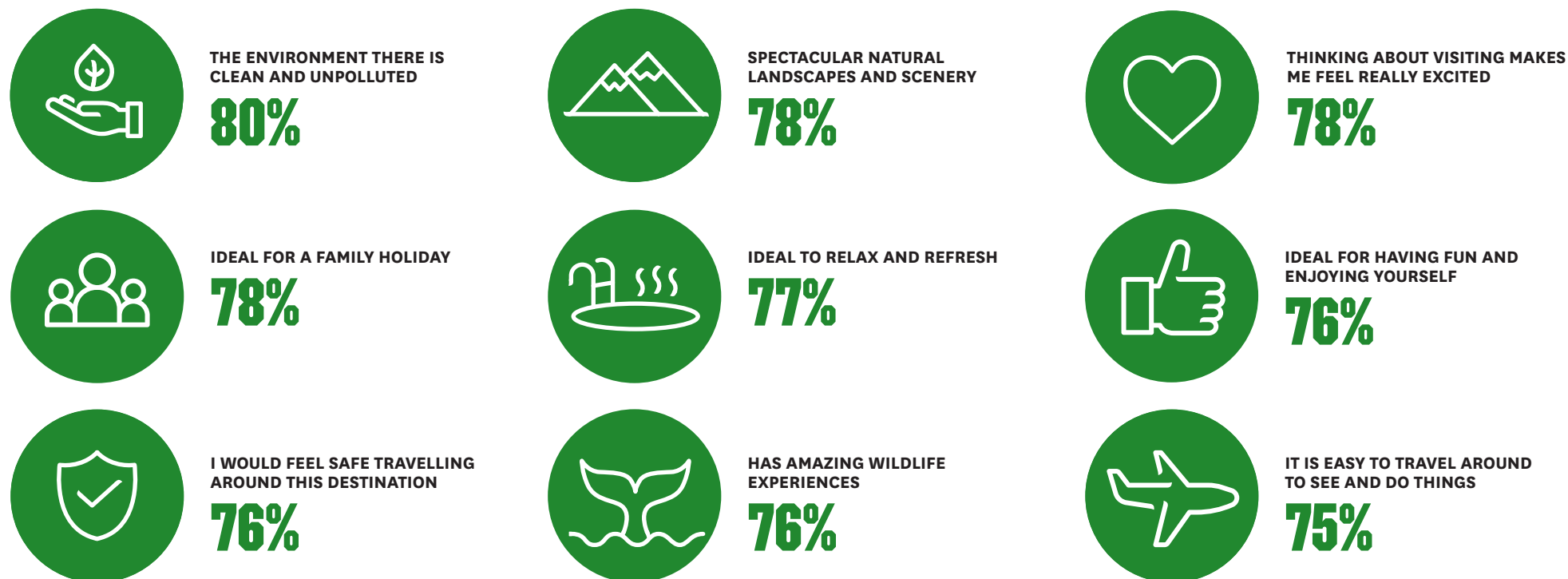
Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | HOW THEY SEE NEW ZEALAND



Active Considerers associate New Zealand with spectacular scenery, clean environments, safety, wildlife, relaxation, and family-friendly experiences. The destination is also seen as exciting, enjoyable, and easy to explore



Source: Active Considerer Monitor data six-month period ending May 2026

INDIA**ACTIVE CONSIDERERS | REASONS TO VISIT NEW ZEALAND**

Fun, scenery, and discovery are the strongest motivations to visit. Relaxation, escaping daily routines, cultural experiences, adventures, and food and beverages further contribute to New Zealand's appeal



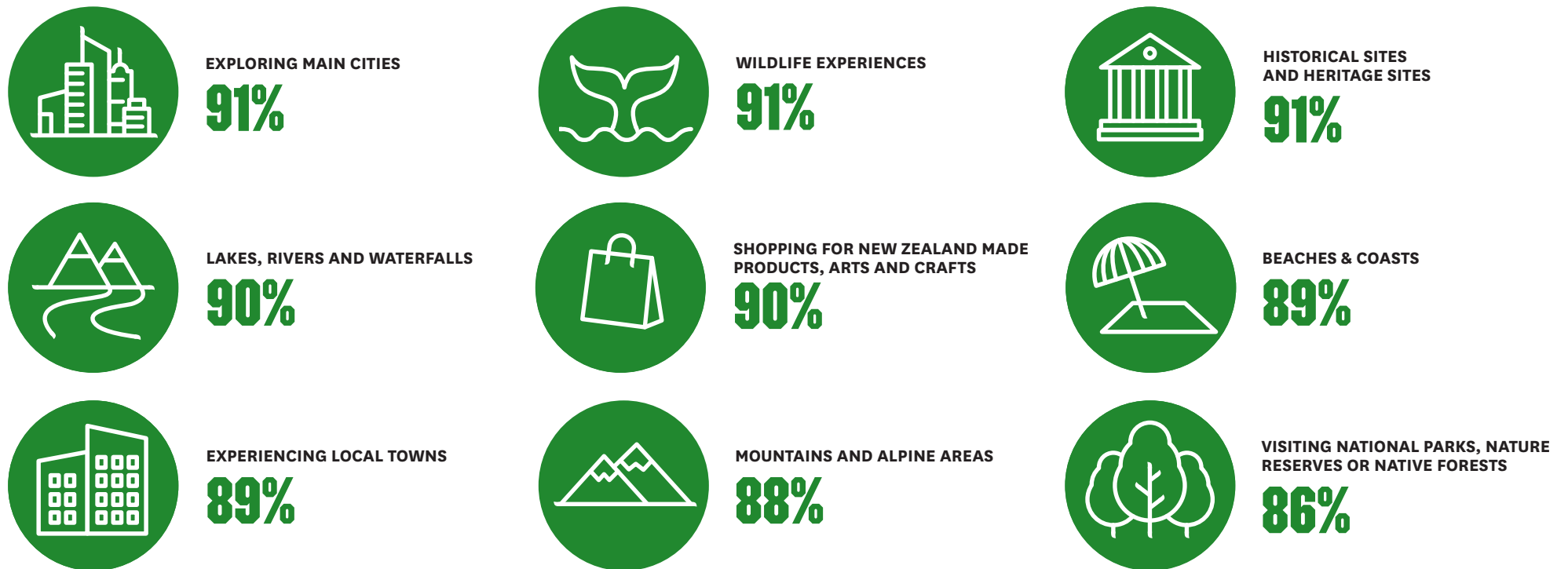
Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY WOULD LIKE TO SEE & DO IN NEW ZEALAND



Indian Active Considerers are interested in a broad mix of experiences, including cities, wildlife, heritage attractions, shopping, lakes, beaches, mountains, and national parks. Interest spans both iconic natural attractions and urban experiences



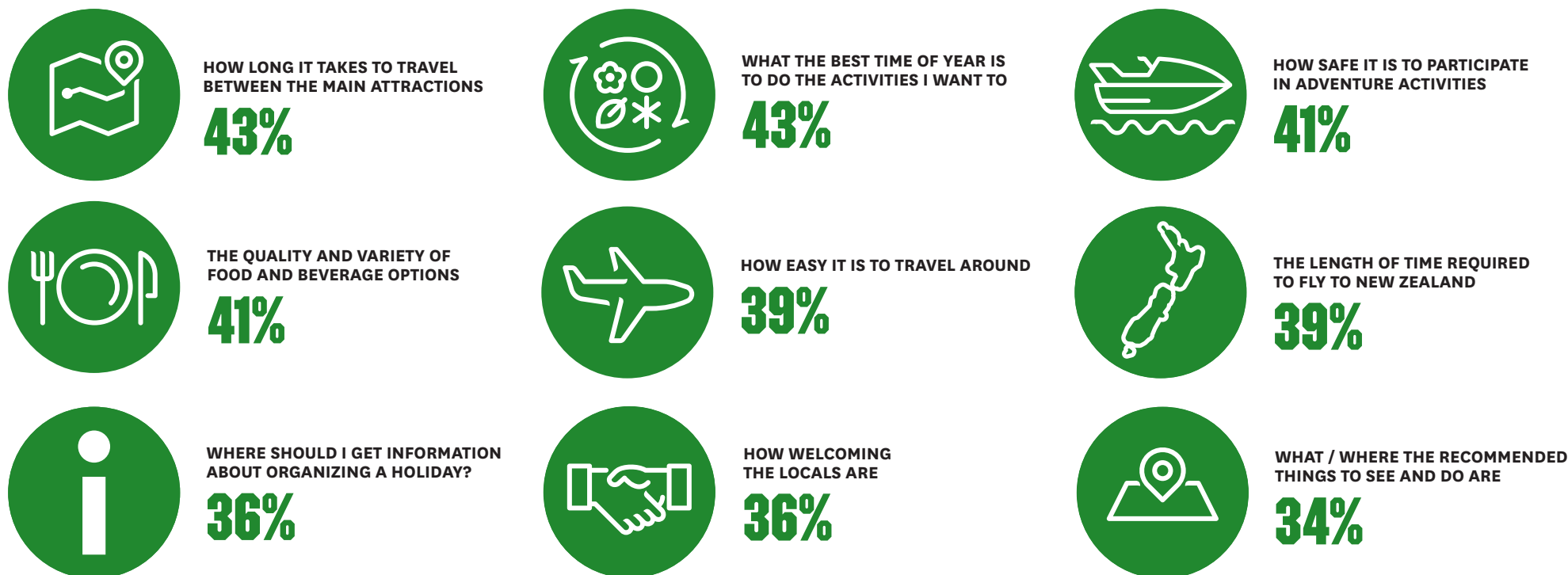
Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY NEED TO KNOW BEFORE VISITING NEW ZEALAND



Indian Active Considerers seek practical information about travel times between attractions, the best time to visit, safety, food options, transport, and how to plan their holiday



Source: Active Considerer Monitor data six-month period ending May 2026

NGA MIHI