

# UNITED STATES

## Visitor & Market Insights

July 2026



Hobbiton™ Movie Set Tours  
Waikato



100% PURE  
NEW ZEALAND

# 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

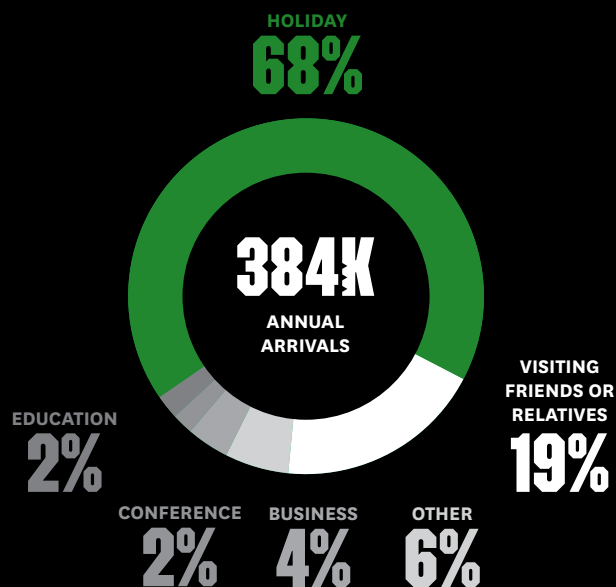
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## VISITOR INSIGHTS | ARRIVALS

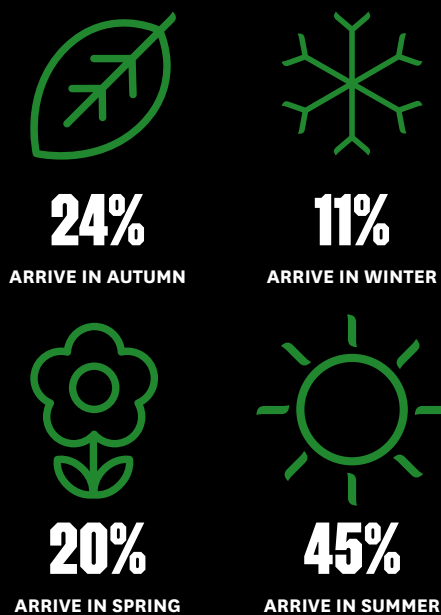


The United States is New Zealand's second-largest visitor market, with 384,000 arrivals last year. Holiday travel accounts for more than two-thirds of visitors (68%). Arrivals peak during summer (45%), although visitation remains strong across autumn and spring

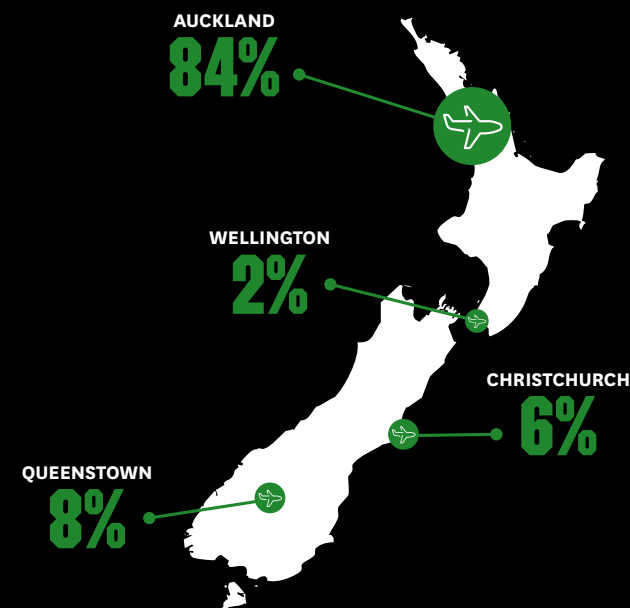
## HOLIDAY TRAVEL IS THE PRIMARY DRIVER OF US VISITATION



## NEARLY HALF OF ARRIVALS OCCUR DURING SUMMER



## AUCKLAND IS THE PRIMARY GATEWAY



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

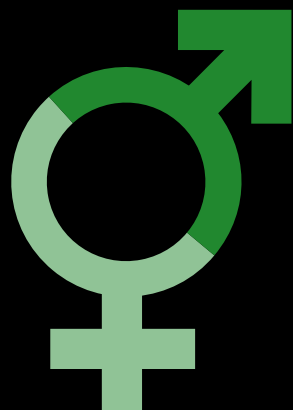
Seasons: Autumn 25/26 (April and May 2025 and March 2026), Winter 25 (June–August 2025), Spring 25 (September–November 2025), and Summer 25/26 (December 2025–February 2026).

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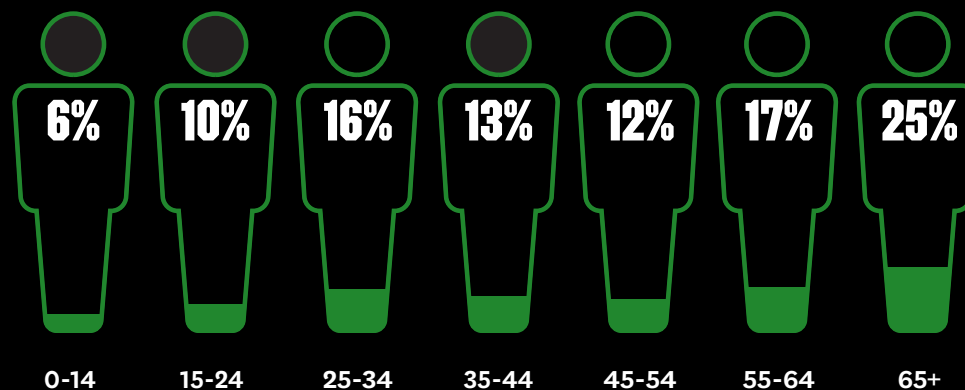
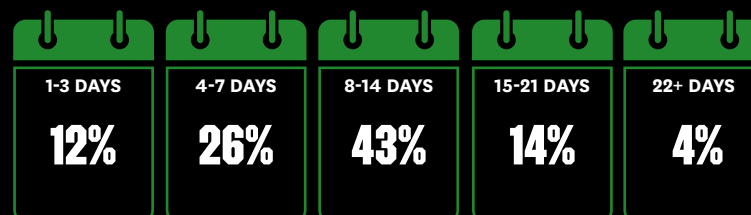
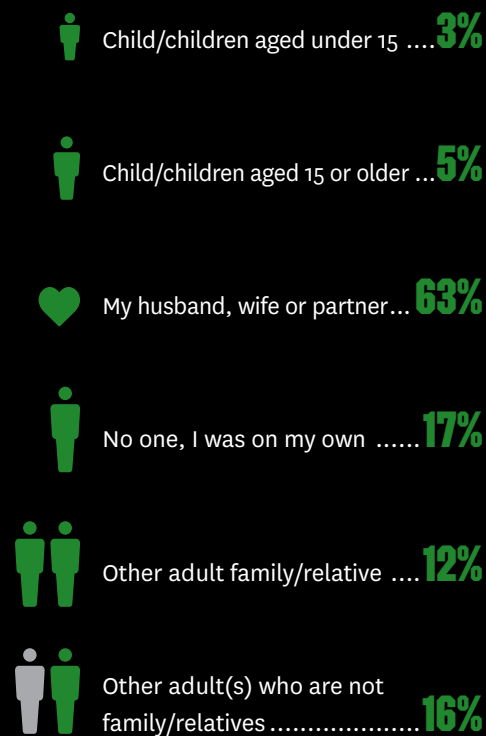
## VISITOR INSIGHTS | WHO THESE HOLIDAYMAKERS ARE



Visitors are typically couples on longer holidays, staying an average of 10 days, with more than half staying at least a week. Older travellers (55+) account for a significant share (42%)

GENDER IS BROADLY  
BALANCED52%  
FEMALE48%  
MALE

## 42% ARE AGED 55 YEARS OR OLDER

LENGTH OF STAY  
(DAYS)AVERAGE  
LENGTH OF STAYCOUPLES DOMINATE  
TRAVEL PARTY COMPOSITION

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)

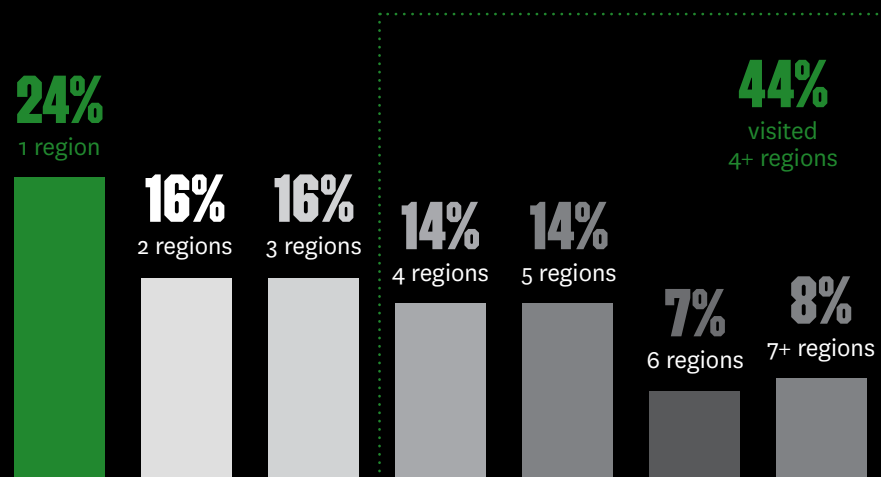
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## VISITOR INSIGHTS | WHERE THEY GO



US visitors combine iconic destinations with regional exploration. Nearly half visit both islands (48%), and 44% explore four or more regions.

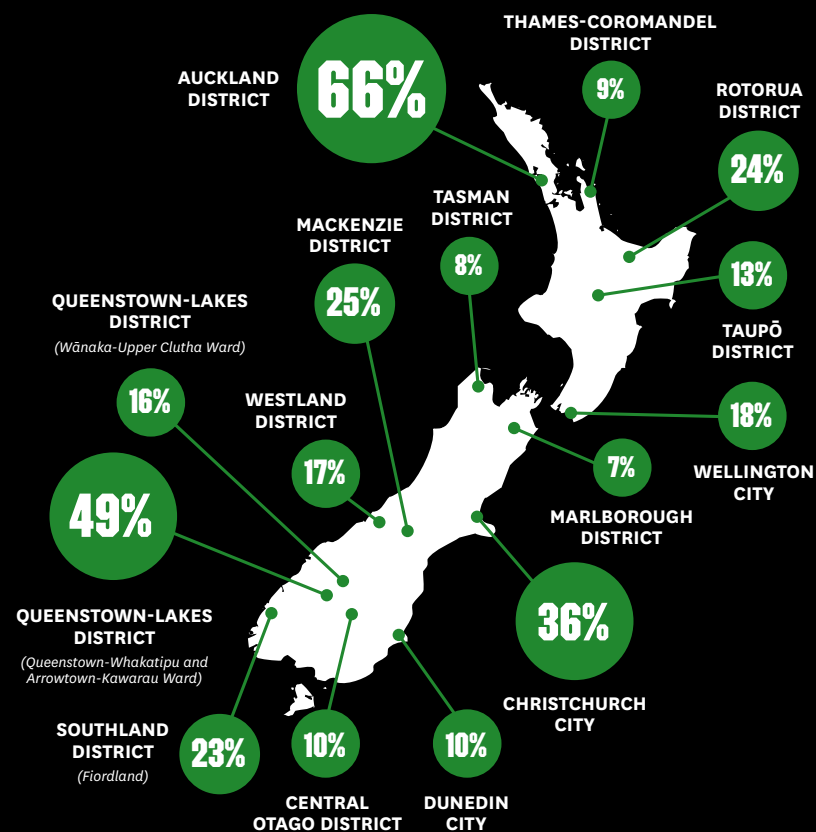
## 44% INCLUDE FOUR OR MORE REGIONS IN THEIR ITINERARY



## TRAVEL COMMONLY SPANS BOTH ISLANDS



## MAJOR CITIES ANCHOR ITINERARIES, WITH ICONIC REGIONS BROADENING EXPLORATION



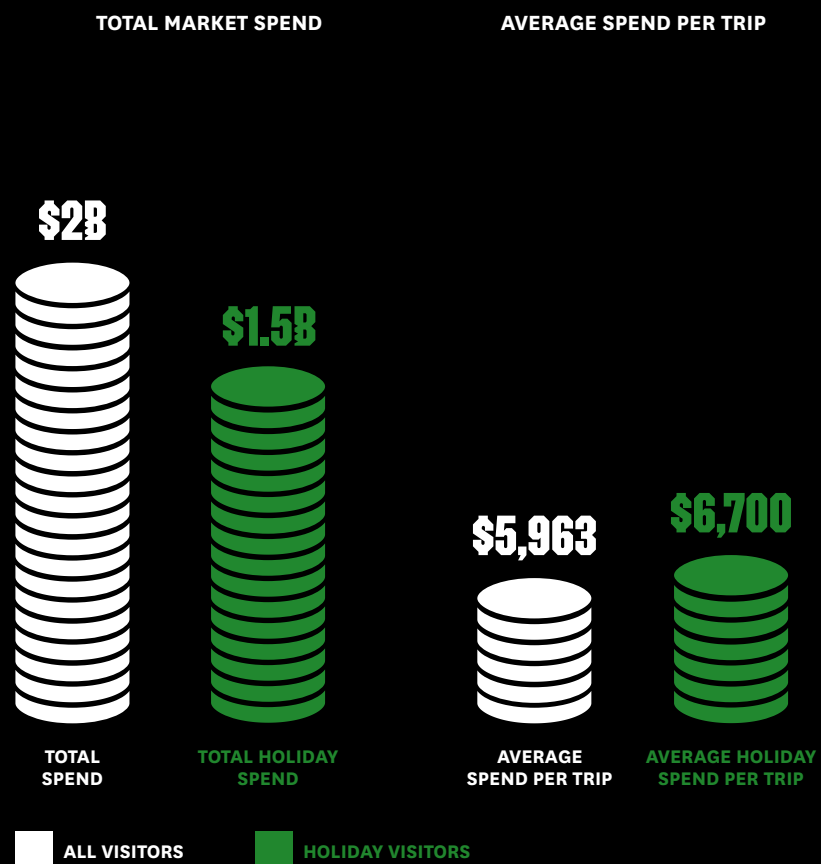
Source: MBIE, International Visitor Survey | Year ending March 2026 | Holiday Visitors

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## VISITOR INSIGHTS | HOW MUCH THEY SPEND



The United States ranks second overall for visitor spend in New Zealand, contributing NZ\$2 billion last year. Holiday visitors accounted for NZ\$1.5 billion of that, spending an average of NZ\$6,700 per trip.



## ACCOMMODATION IS THE LARGEST SPENDING CATEGORY

## ACCOMMODATION



30%

## FOOD AND BEVERAGE



3%

## SHOPPING



6%

## CAR RENTAL



9%

## ENTERTAINMENT



12%

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## VISITOR INSIGHTS | WHAT THEY DO



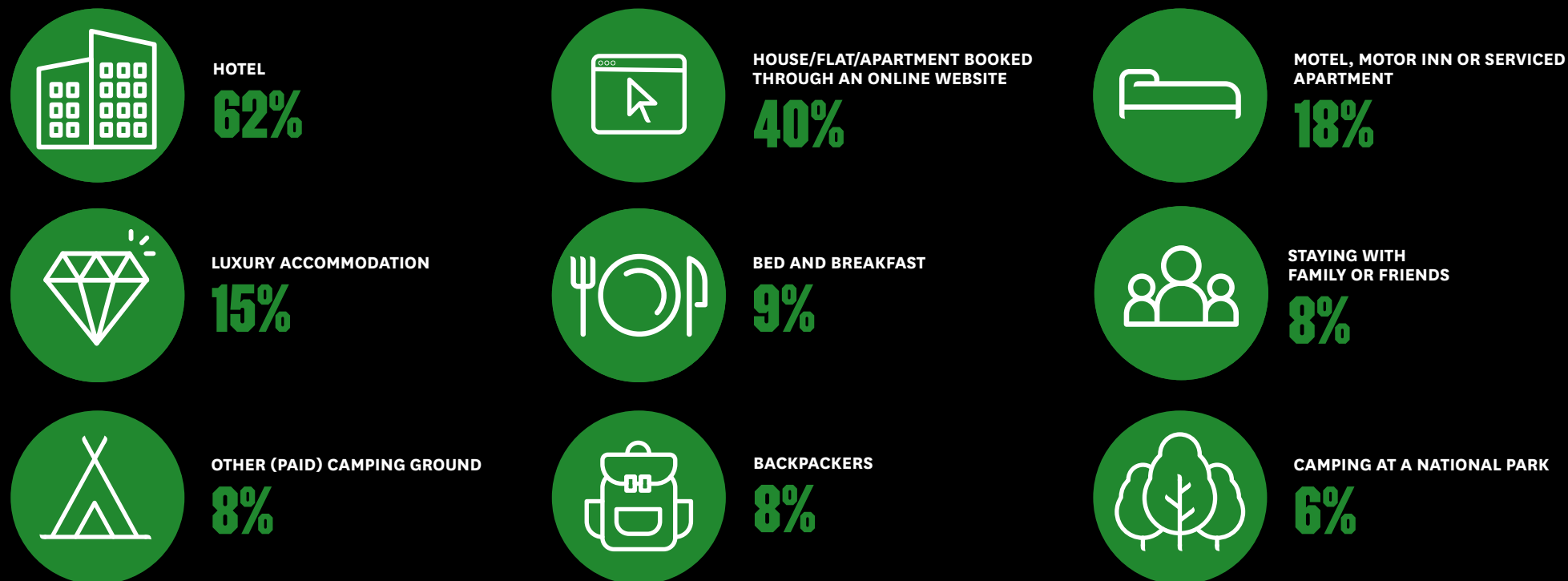
Iconic landscapes and cultural experiences define US itineraries

## TOP ACTIVITIES ENJOYED BY US VISITORS ON HOLIDAY IN NEW ZEALAND



**USA****VISITOR INSIGHTS | WHERE THEY STAY**

Hotels are the preferred accommodation choice followed by online-booked rentals and premium accommodation. US visitors are more likely than many markets to choose luxury accommodation

**POPULAR ACCOMMODATION TYPES**

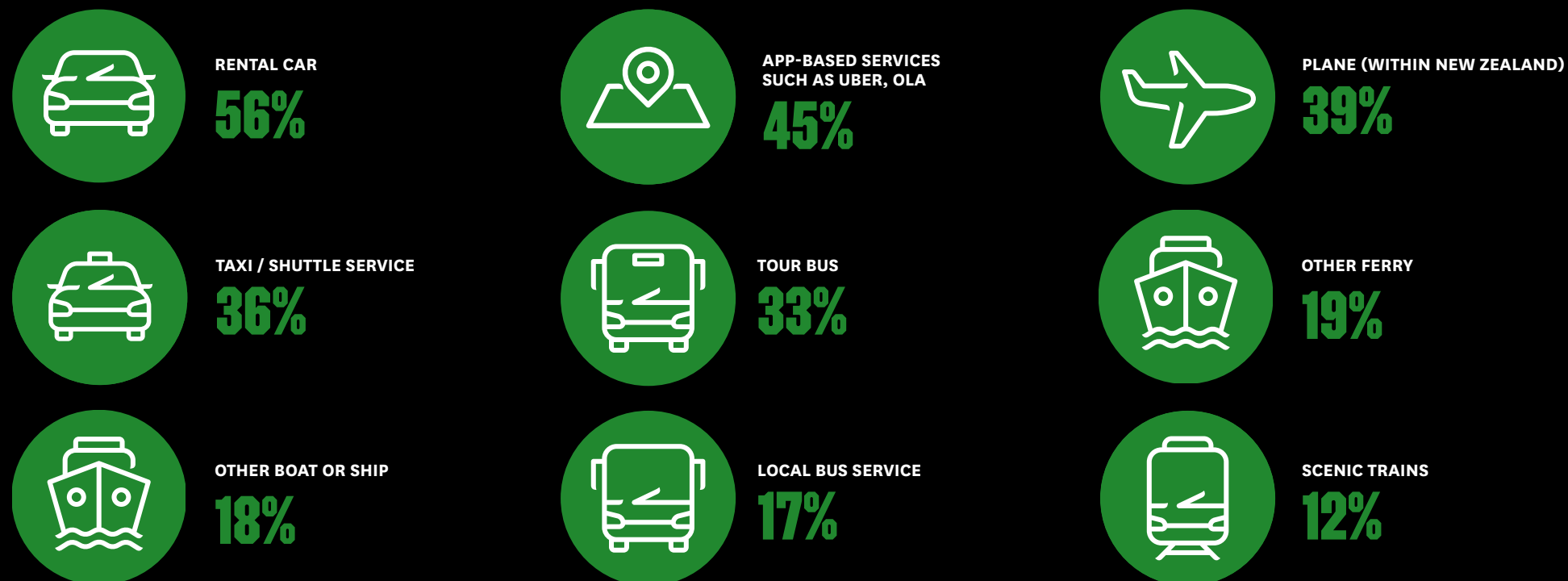
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## VISITOR INSIGHTS | HOW THEY TRAVEL



Self-drive and domestic aviation underpin travel. Rental cars are the most common option (56%), with domestic flights, rideshare services, tour buses, and ferries supporting broader exploration

## 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



USA

## ACTIVE CONSIDERERS | JOURNEY FUNNEL



An estimated 51 million Americans qualify as Active Considerers, with nearly half (47%) ranking New Zealand as their preferred destination. Around seven million are already in a booking mindset



**67%** OFF-PEAK CONSIDERATION\*



**47%** (24M) TOP PREFERENCE\*\* AMONG ACTIVE CONSIDERERS



**14%** (7M) 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

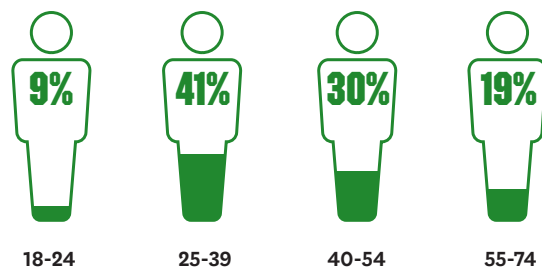
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## ACTIVE CONSIDERERS | WHO THEY ARE &amp; WHERE THEY LIVE

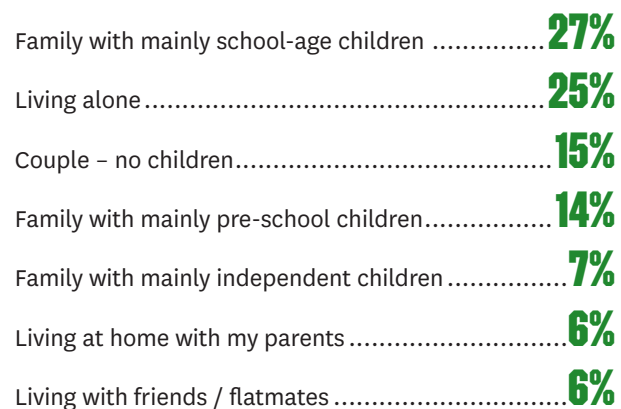


Active Considerers are affluent adults aged 25–54 (71%), concentrated in key states including California, New York, Florida, and Texas. Families dominate, alongside a sizeable segment of solo households

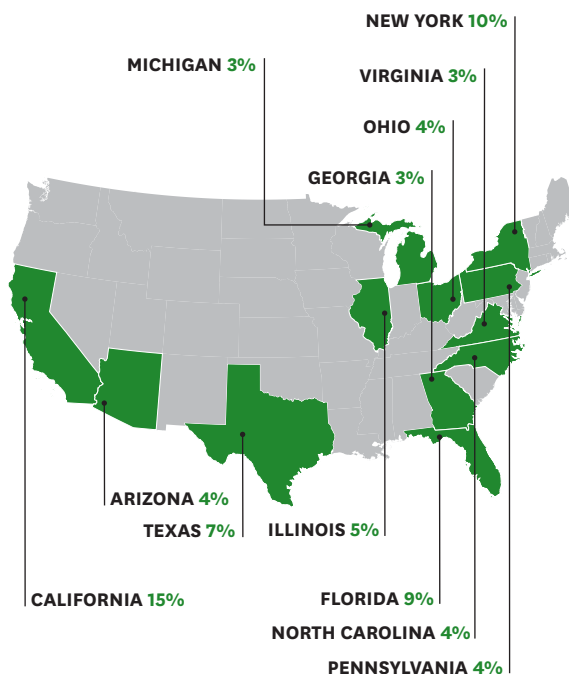
## SEVEN IN TEN ARE AGED 25–54



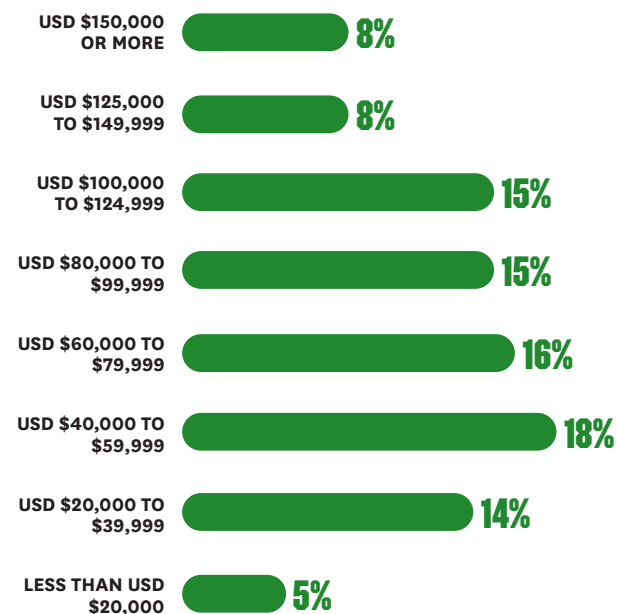
## FAMILIES AND COUPLES MAKE UP THE LARGEST HOUSEHOLD GROUPS



## CALIFORNIA IS THE LARGEST SOURCE STATE



## HOUSEHOLD INCOME OF ACTIVE CONSIDERERS IS WIDELY SPREAD



\*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



Nature, culture, and unique experiences define New Zealand's appeal, including spectacular scenery, Māori culture, adventure, authenticity, and opportunities to escape the ordinary



SPECTACULAR NATURAL  
LANDSCAPES AND SCENERY

**71%**



OFFERS A WIDE VARIETY  
OF TOURIST EXPERIENCES

**67%**



THINKING ABOUT VISITING MAKES  
ME FEEL REALLY EXCITED

**67%**



IDEAL FOR HAVING FUN AND  
ENJOYING YOURSELF

**67%**



OFFERS A WIDE VARIETY OF OUTDOOR  
AND ADVENTURE ACTIVITIES

**67%**



HAS A UNIQUE INDIGENOUS  
CULTURE

**66%**



A PLACE YOU CAN ESCAPE FROM  
THE ORDINARY

**66%**



OFFERS OPPORTUNITIES TO  
EXPERIENCE LOCAL CULTURE

**66%**



THE ENVIRONMENT THERE IS  
CLEAN AND UNPOLLUTED

**66%**

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

USA

## ACTIVE CONSIDERERS | REASONS TO VISIT NEW ZEALAND



Scenery, discovery, and enjoyment drive visit intent, with Active Considerers seeking beautiful landscapes, new experiences, relaxation, cultural connection, and local food and beverages



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

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

Nature, wildlife, and authentic local experiences are key drivers of interest, complemented by local cuisine, heritage attractions, and opportunities to explore towns and cities



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

USA

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



Timing, travel, and logistics are key considerations, with Active Considerers seeking guidance on flights, seasonal conditions, transport, safety, and getting around New Zealand



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

NGA MIHI