

INDIA

Visitors & Market Insights

July 2025



**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 people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Statistics New Zealand's International Visitor Arrivals and MBIE's International Visitor Survey.

Mix of Markets

The mix of markets covered in our Market Snapshots include:

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



VISITOR INSIGHTS

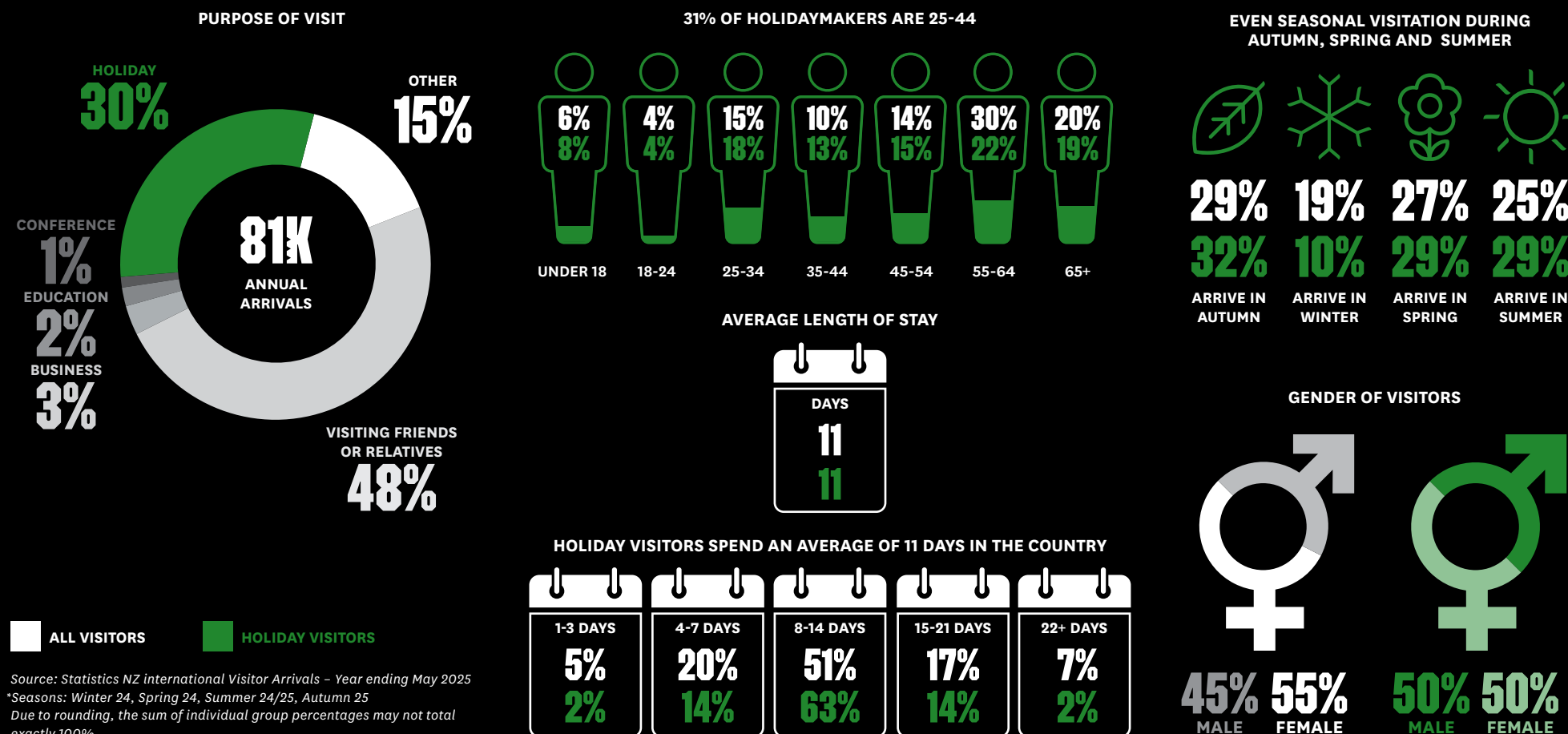
Latest India market arrival insights

INDIA

TRAVELLER INSIGHTS



Last year, 81,000 Indian visitors arrived in New Zealand, with 30% arriving for holidays. They stayed an average of 11 days, mostly across spring, summer, and autumn, with fewer visits in winter. The largest age group was 55+, and 63% stayed between 8 and 14 days. Visiting friends and family was the top travel purpose, followed by holidays.

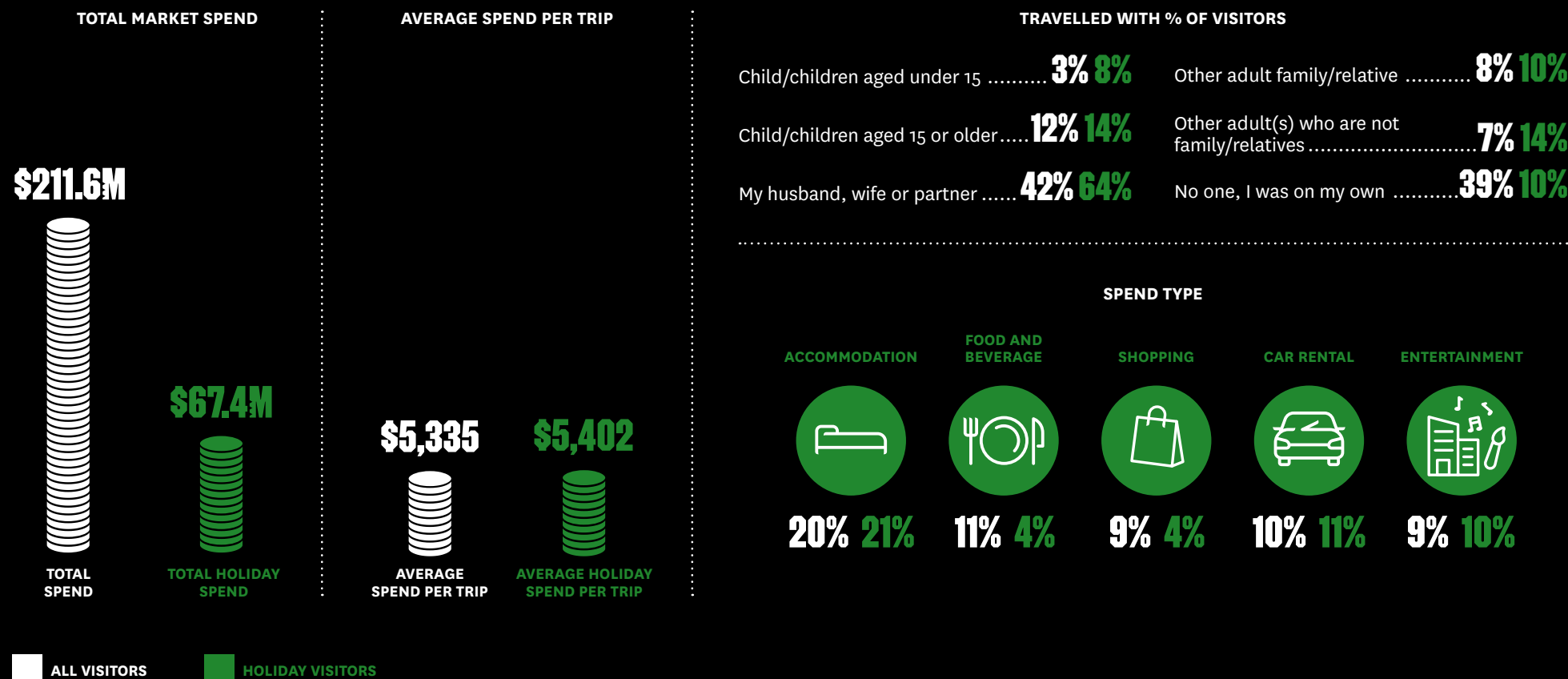


INDIA

VISITOR SNAPSHOT



Indian visitors spent \$211.6 million in NZ, with \$67.4 million by holidaymakers. The average spend per trip was \$5,335, rising to \$5,402 for holidays. 21% of spending was on accommodation, and visitors were more likely to travel with their significant other.



Source: MBIE, International Visitor Survey. Year ending March 2025

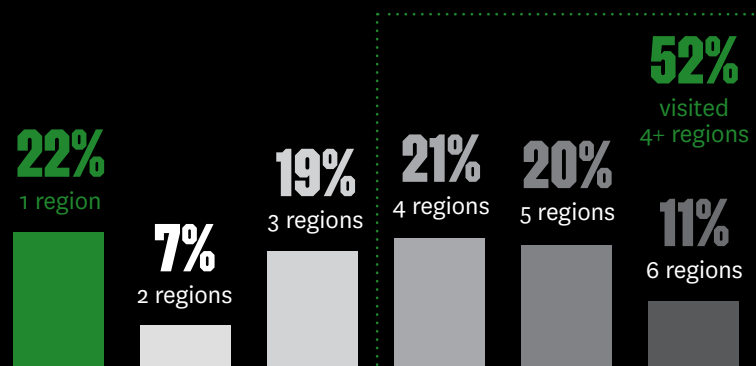
INDIA

TRAVELLER INSIGHTS

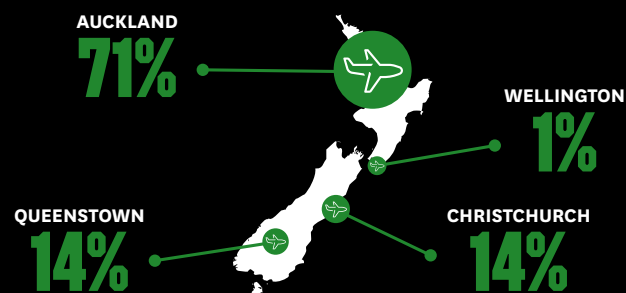


Most Indian visitors spent time in the North Island (79%) and a similarly high proportion visited the South Island (73%), with over half (52%) exploring both. Indian travellers tend to cover a wide area, with 52% visiting four or more regions. Popular destinations included Auckland, Queenstown-Lakes District, and Christchurch.

NUMBER OF REGIONS VISITED PER VISIT



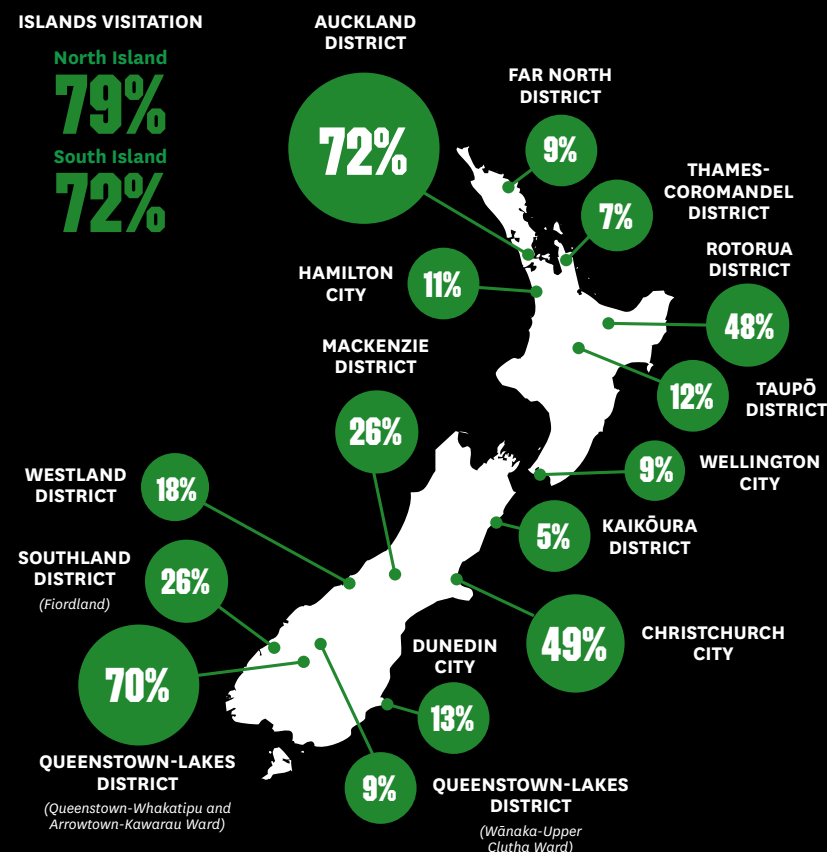
ARRIVAL AIRPORT



REGIONS VISITED PER VISIT

ISLANDS VISITATION

North Island
79%
South Island
72%



Source: MBIE, International Visitor Survey | Year ending March 2025 | Holiday Visitors
NZ Stats - Holiday Arrivals (Port of Arrival)

INDIA

TRAVELLER INSIGHTS



Indian holidaymakers are strongly drawn to New Zealand's natural beauty, especially mountains, lakes, geothermal parks, beaches, and glow worm tours. Walking, hiking, as well as visits to gardens and museums also feature prominently in their travel activities.

TOP ACTIVITIES ENJOYED BY INDIAN VISITORS IN NEW ZEALAND



Source: MBIE, International Visitor Survey | Year ending March 2025 | Holiday Visitors

INDIA

TRAVELLER INSIGHTS



Most holiday visitors from India opted for hotels or online-booked private accommodations. Motel/serviced apartments and luxury accommodation was also popular. Rental cars were the most popular transport option among holidaymakers.

POPULAR ACCOMMODATION TYPES



61%

Hotel



41%

House/Apartment booked online (AirBnb etc)



24%

Motel, Motor Inn or Serviced Apartment



21%

With family or friends



19%

Luxury Accommodation



8%

Bed & Breakfast



7%

Free camping in tent, caravan or motorhome



5%

Other e.g. campervan, holiday park



5%

Farm-stay or Home-stay

MODES OF TRANSPORT



34%

Rental car



24%

Tour bus



23%

Plane (within New Zealand)



21%

Uber or other app based



20%

Taxi/shuttle



17%

Other boat or ship



13%

Local bus service



11%

Car or van owned by you/ family/friend(s)/company



11%

Scenic trains

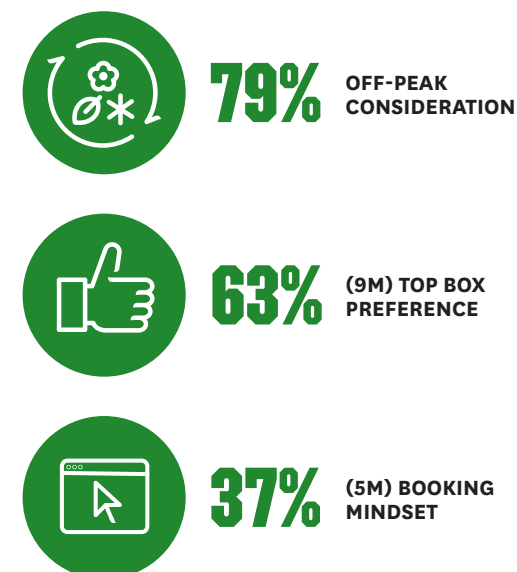
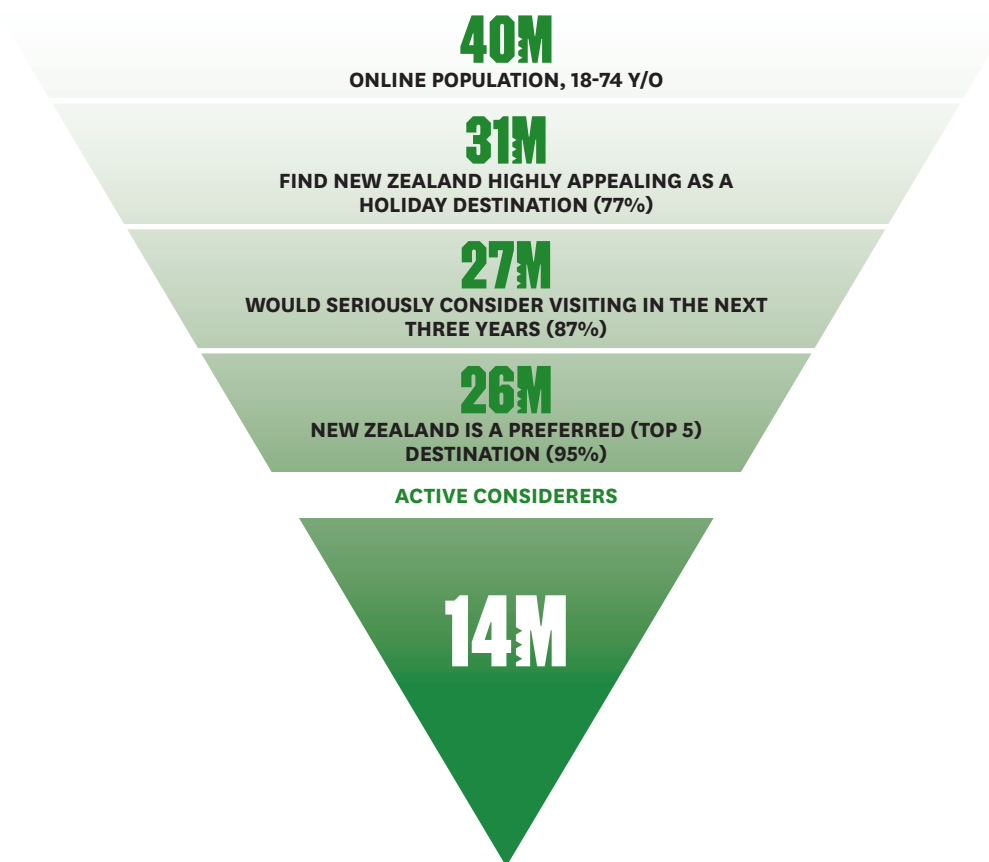
OUR FUTURE TRAVELLERS

Our Active Considerers

They are Tourism New Zealand's marketing audiences. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

INDIA**ACTIVE CONSIDERERS**

There are around 14 million Active Considerers in India*, with about 9 million identifying New Zealand as their top destination choice.



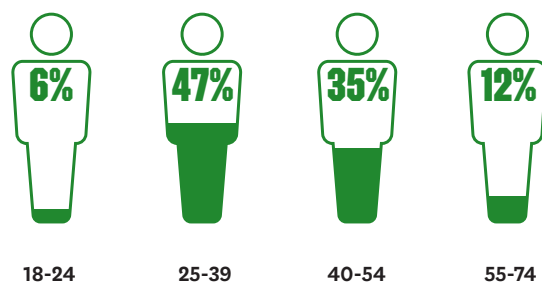
Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Indian ACs indicate they are willing to spend at least INR 160,000 pp on a holiday to New Zealand. *In India, our target cities are New Delhi, Bangalore and Mumbai

Source: Active Considerer Monitor data 6-month period ending June 2025

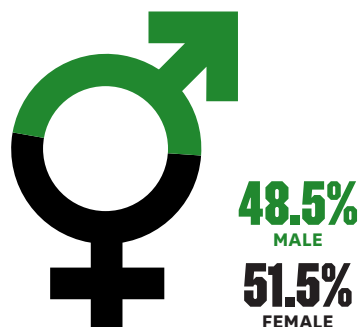
INDIA**ACTIVE CONSIDERERS**

Active Considerers are predominantly aged 25–54, with more than 1 in 5 reporting an annual household income above INR 5M

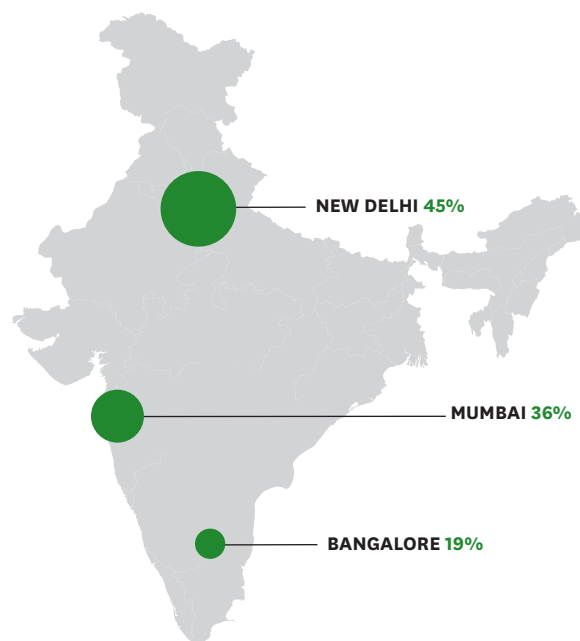
MOST ACS ARE CONCENTRATED IN THE 25–54 AGE BRACKET (80%+)



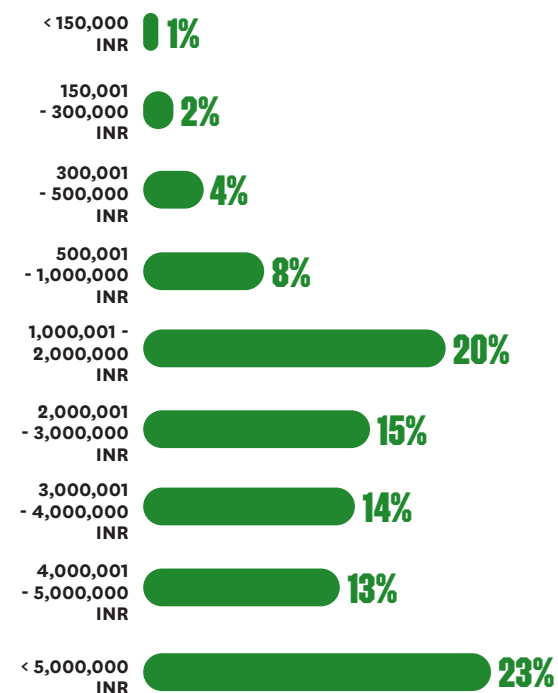
GENDER OF ACS



SPREAD OF ACS ACROSS MAIN CITIES



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



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

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Source: Active Considerer Monitor data 6-month period ending June 2025

INDIA**ACTIVE CONSIDERERS**

Most Indian Active Considerers associate New Zealand with spectacular natural scenery, a clean environment, and feeling safe and ideal for family holidays. It is also viewed as offering a wide range of experiences and activities, ease of travel, and a sense of excitement and escape.

BRAND ASSOCIATIONS

**SPECTACULAR NATURAL
LANDSCAPES AND SCENERY**

78%

**THE ENVIRONMENT THERE
IS CLEAN AND UNPOLLUTED**

78%

IDEAL FOR A FAMILY HOLIDAY

77%

**I WOULD FEEL SAFE TRAVELLING
AROUND THIS DESTINATION**

77%

**IT IS EASY TO TRAVEL AROUND TO
SEE AND DO THINGS**

75%

**OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES**

75%

**OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES**

75%

**THINKING ABOUT VISITING MAKES
ME FEEL REALLY EXCITED**

75%

**A PLACE YOU CAN ESCAPE THE
ORDINARY**

75%

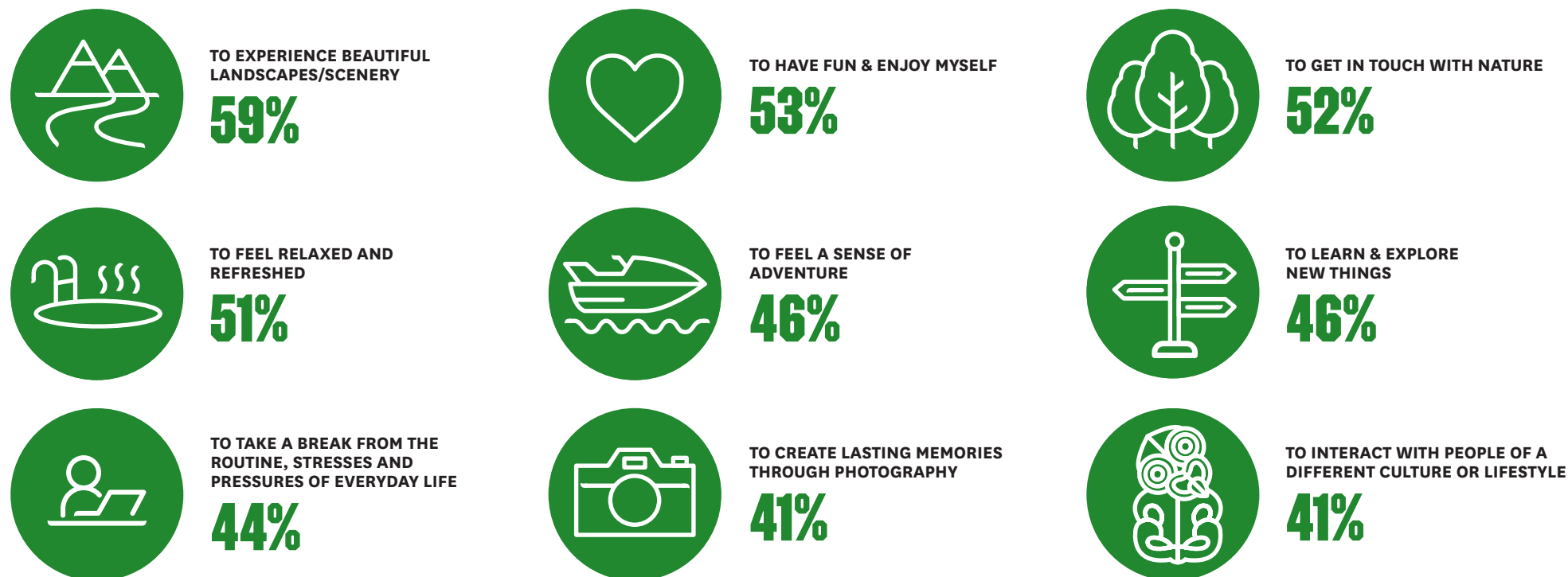
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INDIA**ACTIVE CONSIDERERS**

New Zealand's beautiful landscapes, nature, enjoyment, and relaxation are key reasons to visit. Additionally, Indian visitors seek to learn new things, take a break, and create lasting memories through photography, among other experiences.

REASONS TO VISIT NEW ZEALAND



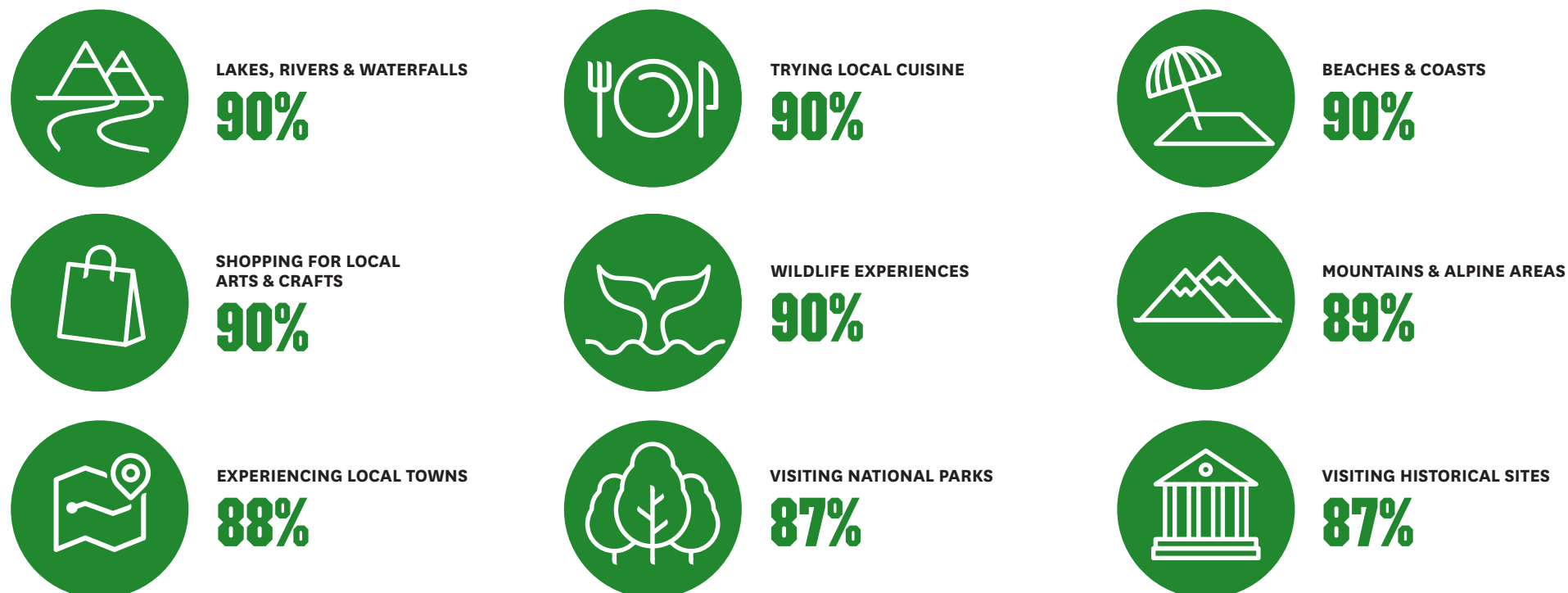
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INDIA**ACTIVE CONSIDERERS**

The top activities of interest include lakes, rivers, waterfalls, local cuisine, beaches, and wildlife experiences, each attracting 90% of respondents. Other popular interests include mountains, local towns, national parks, and heritage sites.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



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INDIA**ACTIVE CONSIDERERS**

Indian Active Considerers want more information on travel times between attractions, the best times to visit for activities, the quality and variety of food and beverages, and flight duration.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



HOW LONG IT TAKES TO TRAVEL
BETWEEN THE MAIN ATTRACTIONS

49%



WHAT TIME OF YEAR IS BEST TO
DO THE THINGS I WANT TO

47%



THE RANGE OF QUALITY FOOD
AND BEVERAGE OPTIONS

44%



THE LENGTH OF TIME REQUIRED TO
FLY TO NEW ZEALAND

43%



WHERE I SHOULD GET INFORMATION
ABOUT ORGANISING A HOLIDAY

42%



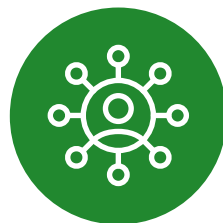
HOW WELCOMING
THE LOCALS ARE

42%



WHAT/WHERE THE RECOMMENDED
THINGS TO SEE AND DO ARE

42%



WHETHER THERE IS A BROAD ENOUGH
VARIETY OF THINGS TO SEE AND DO

41%



HOW EASY IT IS TO TRAVEL AROUND

41%

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NGA MIHI