

UNITED STATES OF AMERICA

Visitors & Market Insights

July 2025

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 USA market arrival insights
International Visitor Survey



Cardrona Alpine Resort
Queenstown



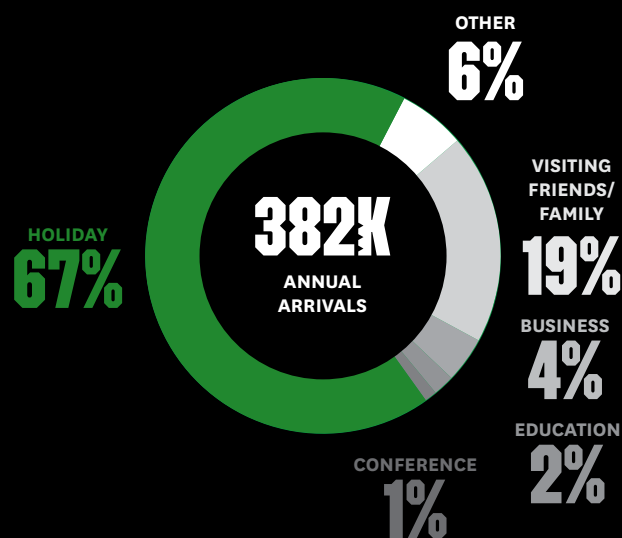
USA

TRAVELLER INSIGHTS

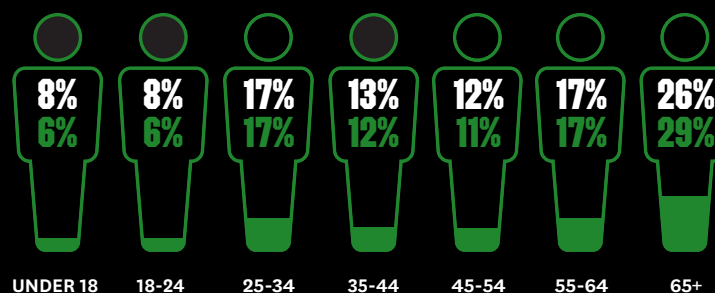


Last year, 382,000 Americans visited New Zealand, with 67% arriving for holidays. Summer was the peak season, and holidaymakers stayed an average of 10 days. Most were aged 25–44 or over 65. The majority stayed 8–14 days, showing a preference for mid-length leisure travel.

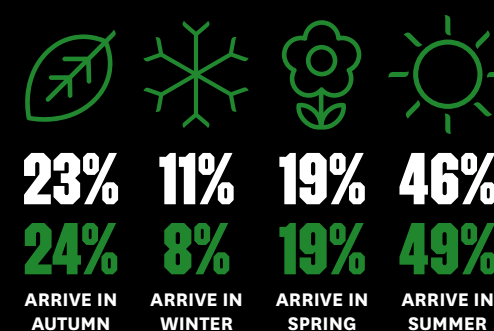
PURPOSE OF VISIT



29% OF HOLIDAYMAKERS ARE 25-44



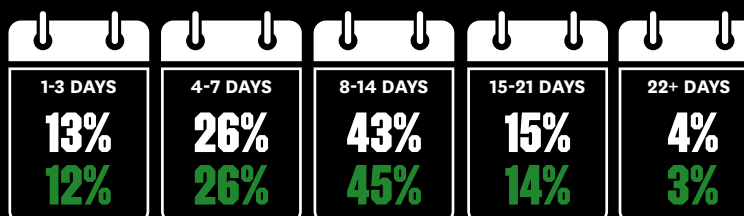
VISITATION PEAKS IN SUMMER



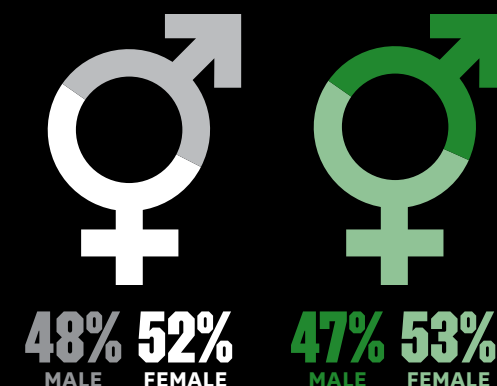
AVERAGE LENGTH OF STAY



LENGTH OF STAY (DAYS)



GENDER OF VISITORS



ALL VISITORS HOLIDAY VISITORS

Source: Statistics NZ international Visitor Arrivals – Year ending May 2025
 *Seasons: Winter 24, Spring 24, Summer 24/25, Autumn 25

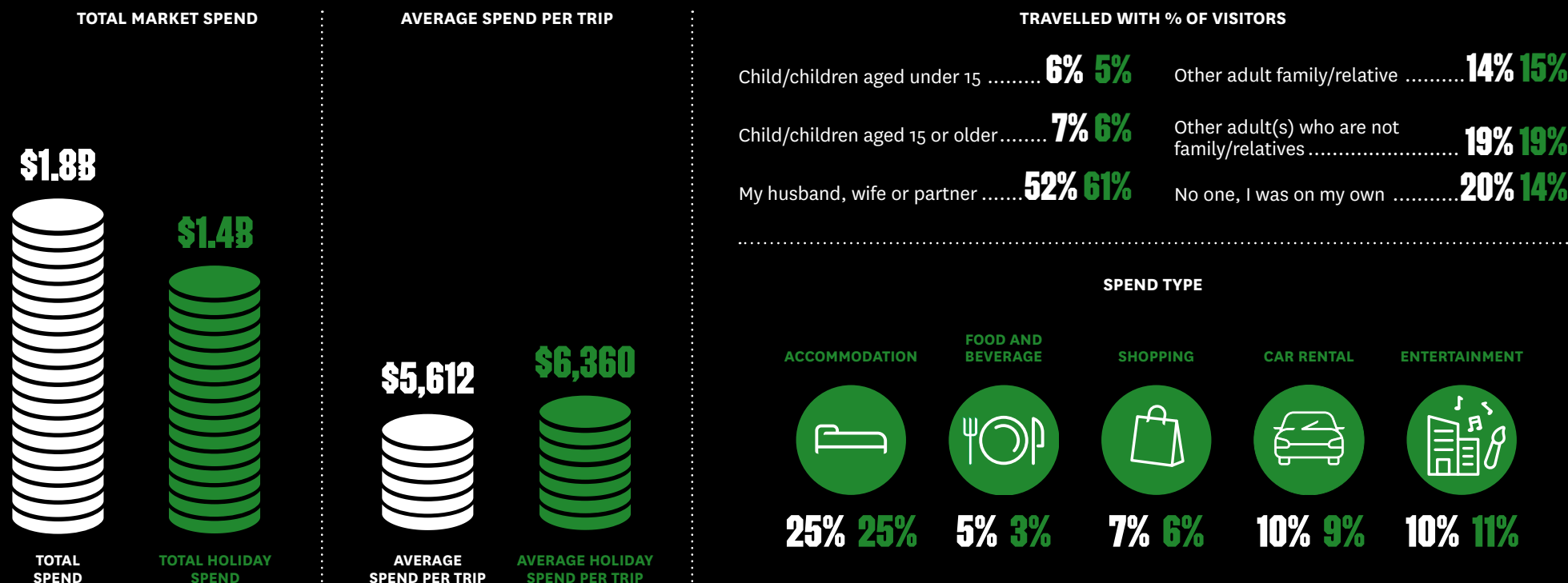
Due to rounding, the sum of individual group percentages may not total exactly 100%

USA

VISITOR SNAPSHOT



US visitors spent \$1.8bn in NZ, with \$1.4bn by holidaymakers. The average spend per trip was \$5,612, rising to \$6,360 for holidays. One quarter of spending was on accommodation, and visitors were most likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

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

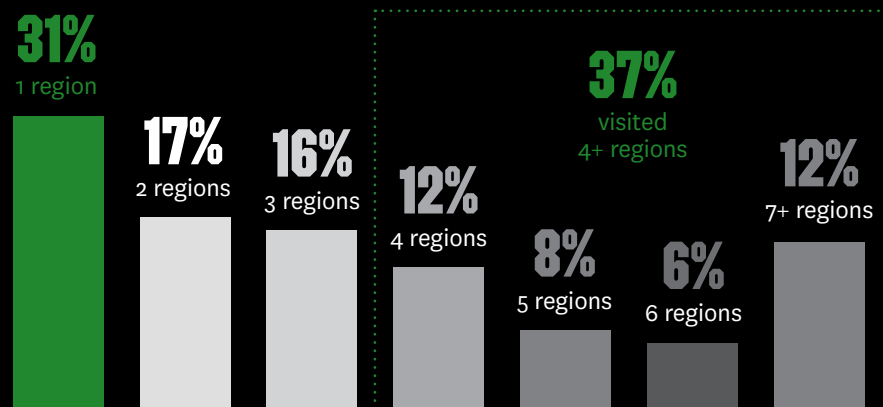
USA

HOLIDAY TRAVELLER INSIGHTS

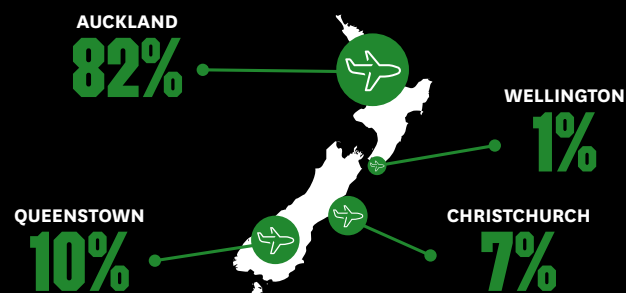


US holidaymakers tend to explore across New Zealand, with 37% visiting four or more regions. Most visited the North Island (84%) and 65% visited the South Island, with 49% visiting both. Top regions included Auckland, Queenstown-Lakes District, and Christchurch.

NUMBER OF REGIONS VISITED PER VISIT



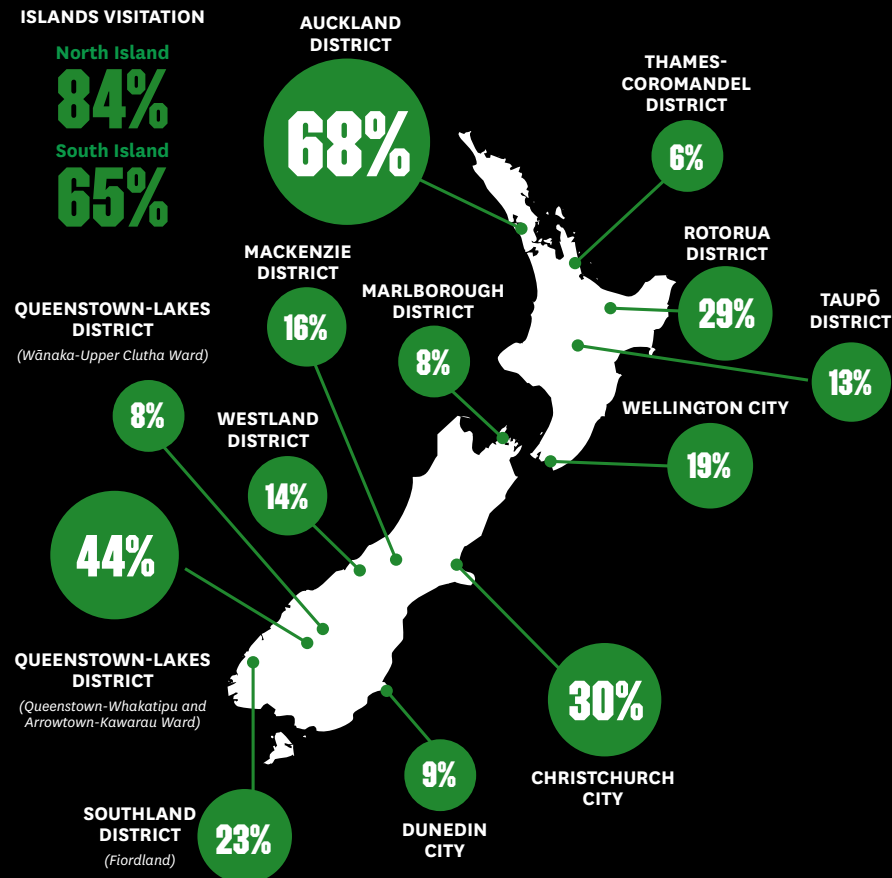
ARRIVAL AIRPORT



REGIONS VISITED PER VISIT

ISLANDS VISITATION

North Island
84%
South Island
65%



USA

HOLIDAY TRAVELLER INSIGHTS



American travellers are primarily drawn to New Zealand's natural beauty—mountains, lakes, hiking trails, and national parks. Beyond nature, film locations, museums and art galleries, and places significant to Māori also hold strong appeal.

TOP ACTIVITIES ENJOYED BY AMERICANS IN NEW ZEALAND



83%

Walk, hike, trek or tramp



81%

Other natural attractions



70%

Visiting a national park



62%

A beach



48%

A film location,
tour or experience

46%

Glow worm tour

USA

HOLIDAY TRAVELLER INSIGHTS



Most visitors from the US opted for hotels or booked private accommodations online. Rental cars were the most popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



66%

Hotel



35%

House/apartment booked
online (AirBnb etc)

21%

Luxury
accommodation

16%

Motel, motor inn or
serviced apartment

8%

Paid camping ground/
holiday park

8%

Bed and Breakfast



6%

Family or friends



4%

In a hut at a National Park/
Department of Conservation area

4%

Free camping

MODES OF TRANSPORT



40%

Rental car



35%

Uber or other
app based

33%

Taxi/shuttle



30%

Plane
(within New Zealand)

27%

Tour bus



18%

Other ferry



15%

Other boat or ship



13%

Local bus service



10%

The ferry between the North
Island and the South Island

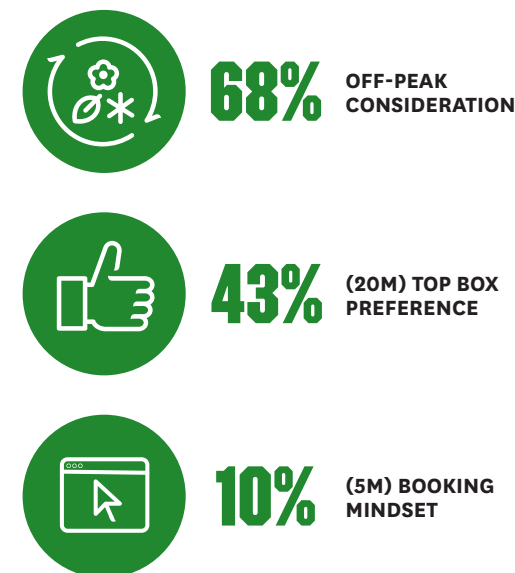
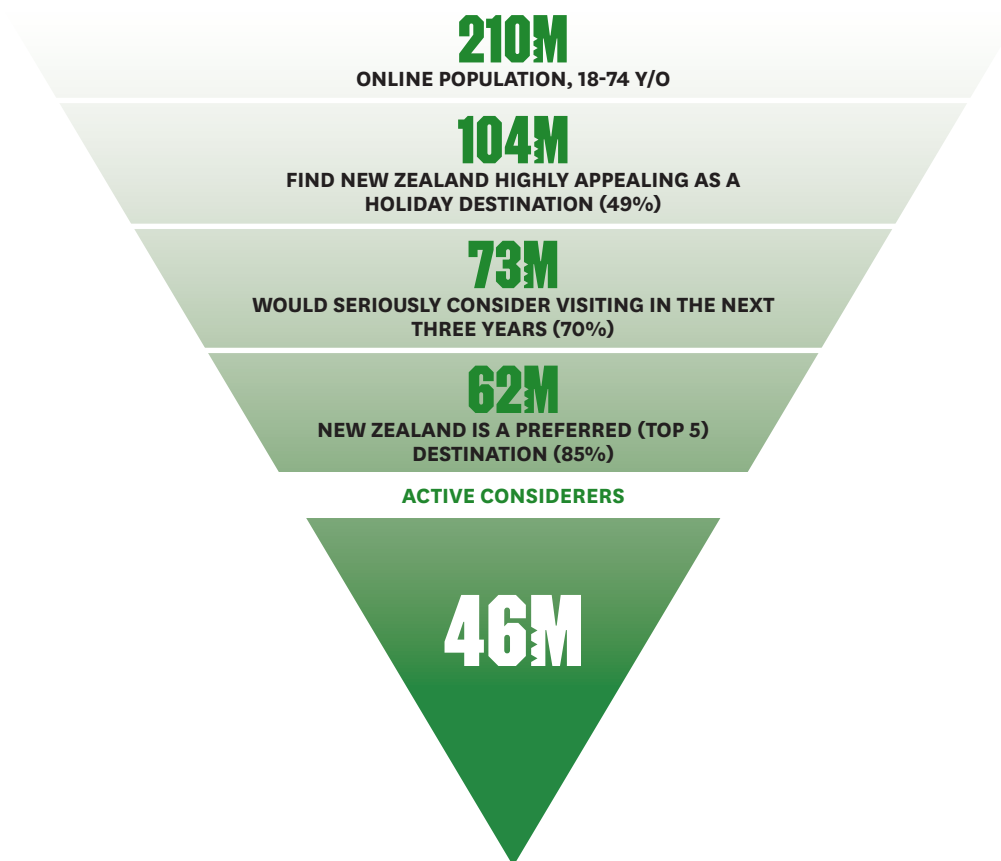
OUR FUTURE TRAVELLERS

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.

USA**ACTIVE CONSIDERERS**

New Zealand is highly appealing to 49% of USA's online population aged 18-74 — that's 104 million people. Of these, 73 million would seriously consider visiting, 62 million rank it in their top five destinations, and 46 million are willing to spend a realistic budget — representing a sizeable pool of Active Considerers.



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Americans indicate they are willing to spend at least USD1500 pp on a holiday to New Zealand.

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

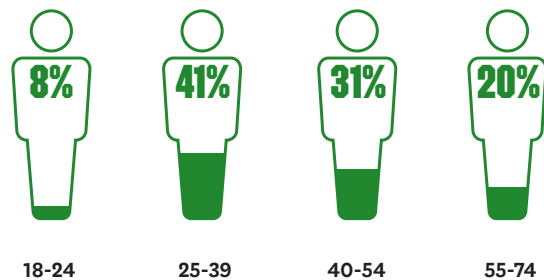
USA

ACTIVE CONSIDERERS

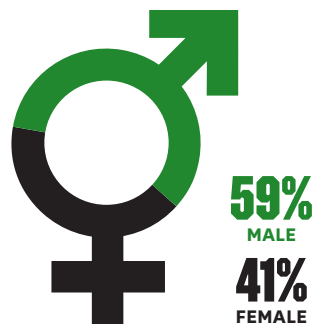


Active Considerers skew 25-39, largely reside in California, Texas and New York and nearly one-third have a household income of USD \$100,000 or over.

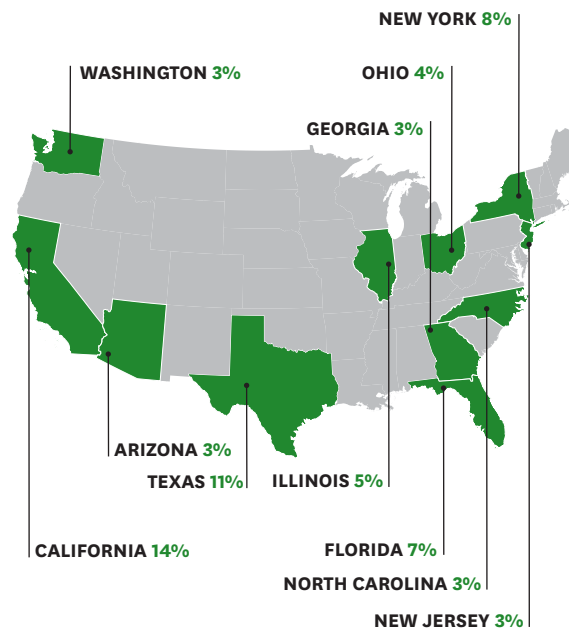
AGE SEGMENT OF ACTIVE CONSIDERERS



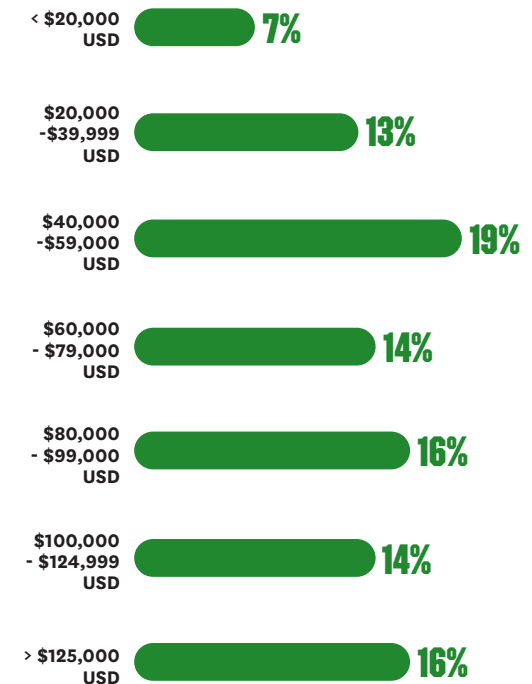
GENDER OF ACs



ACTIVE CONSIDERERS SKEW LARGELY WHERE THERE ARE DIRECT FLIGHT ROUTES



ANNUAL HOUSEHOLD INCOME SPREAD - ACs



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

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USA**ACTIVE CONSIDERERS**

Among Americans, New Zealand is highly regarded for its stunning natural landscapes, diverse outdoor and tourist experiences, and unique offerings not found elsewhere. Visitors also associate it with excitement, safety, cultural immersion, and opportunities to see amazing wildlife.

BRAND ASSOCIATIONS

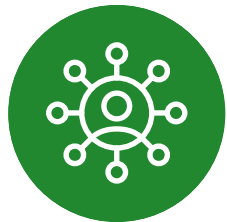
SPECTACULAR NATURAL
LANDSCAPES AND SCENERY

73%

OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES

70%

THINKING ABOUT VISITING MAKES
ME FEEL REALLY EXCITED

70%

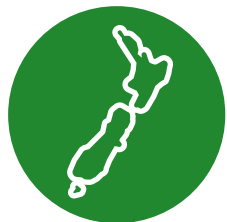
OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES

69%

OFFERS EXPERIENCES THAT YOU
CANNOT GET ANYWHERE ELSE

68%

I WOULD FEEL SAFE TRAVELLING
AROUND THIS DESTINATION

68%

A PLACE YOU CAN ESCAPE FROM
THE ORDINARY

68%

OFFERS OPPORTUNITIES TO
EXPERIENCE LOCAL CULTURE

68%

HAS AMAZING
WILDLIFE EXPERIENCES

68%

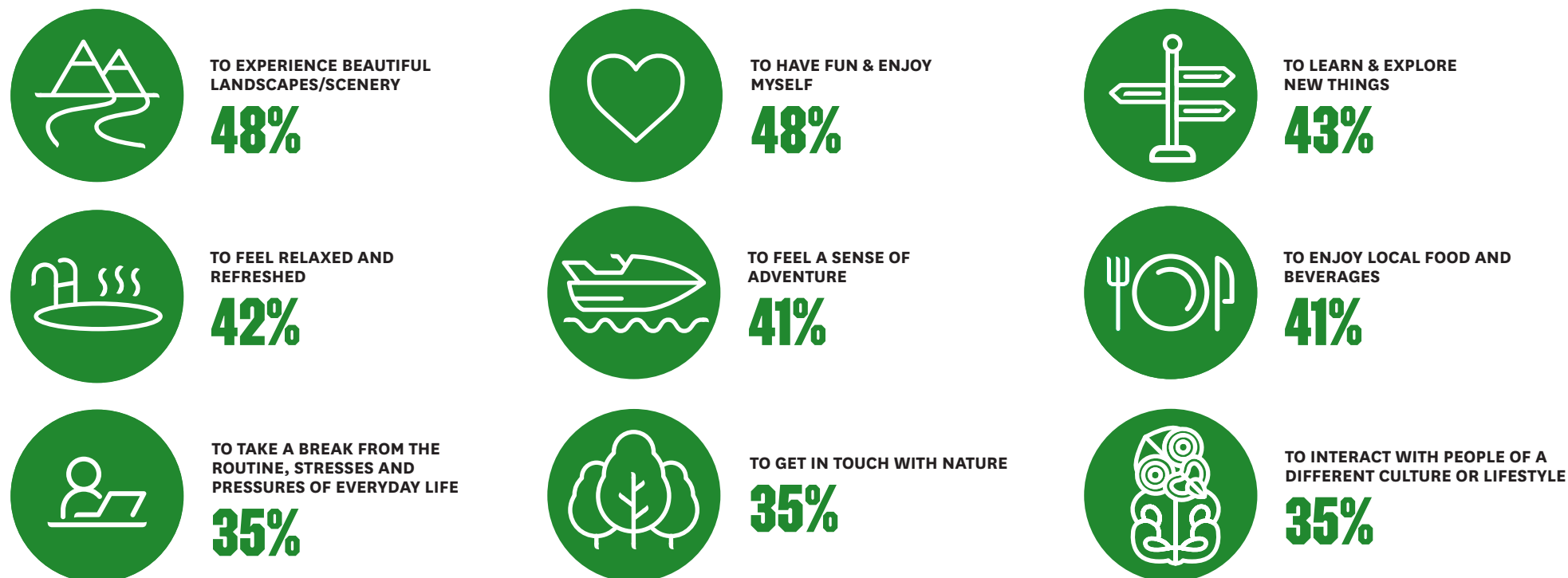
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Source: Active Considerer Monitor data 6-month period ending June 2025

USA**ACTIVE CONSIDERERS**

The top reasons people want to visit New Zealand for a holiday are to experience its beautiful landscapes and scenery, have fun and enjoy themselves, and learn and explore new things. Other key motivations include relaxation, adventure, local food, cultural interactions, connecting with nature, and escaping everyday stress.

REASONS TO VISIT NEW ZEALAND



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Americans indicate they are willing to spend at least USD1500 pp on a holiday to New Zealand.

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

USA**ACTIVE CONSIDERERS**

Potential visitors are most interested in experiencing New Zealand's beaches and coasts, trying local cuisine, and exploring lakes, rivers, and waterfalls. Other popular activities include wildlife experiences, visiting heritage sites, exploring cities, shopping for local products, exploring nature reserves, and taking scenic boat cruises.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



TRYING LOCAL CUISINE

90%

BEACHES & COASTS

90%

LAKES, RIVERS AND WATERFALLS

89%HISTORICAL SITES AND
HERITAGE SITES**87%**

WILDLIFE EXPERIENCES

87%SHOPPING FOR NEW ZEALAND
MADE PRODUCTS, ARTS AND
CRAFTS**87%**

EXPLORING MAIN CITIES

87%VISITING NATIONAL PARKS,
NATURE RESERVES OR NATIVE
FORESTS**86%**

SCENIC BOAT CRUISE

86%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Americans indicate they are willing to spend at least USD1500 pp on a holiday to New Zealand.

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

USA

ACTIVE CONSIDERERS



US Active Considerers would like more information on flight times, ease of getting around, and the best time of year to visit. Also about local hospitality, safety, weather conditions, and food and beverage options, to solidify their travel intentions.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



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NGA MIHI