INDIA

Market information about our Visitors and our Active Considerers
Past Visitor Research
This is information collected about those who have visited New Zealand. This is the source for the visitor snapshot infographics. It is primarily sourced from Statistics New Zealand (International Travel and Migration), and the Ministry of Business, Innovation and Employment (International Visitor Survey).

Throughout this document, any pages that refer to past visitor research will have a black background like this one.

Active Considerer Research
An Active Considerer is someone who is considering coming to New Zealand for their next holiday, and New Zealand is one of their top five destinations they would most like to visit. Tourism New Zealand commissions ongoing research (Kantar TNS), to understand who these people are, and what their motivations and barriers are; this research is the key information source for understanding our future visitors. To ensure we gather information from a relevant audience in the Emerging Markets, we only survey those respondents that are in a higher socio-economic position.

Throughout this document, any pages that refer to Active Considerer research will have a white background like this one.
India is the largest of our emerging markets with over 60K total arrivals and is experiencing strong growth.

**Visitor Snapshot**

- **Purpose of Visit**
  - Business: 2K
  - Conferences: 1K
  - Education: 1K
  - Other: 7K
  - Visiting Friends/Relatives: 22K

- **Average Length of Stay**
  - Holiday Stay: 30K (0.4m days)
  - Total Stay: 63K (3.2m days)

- **Holiday Visitors**
  - First Time Visitors: 75%
  - Repeat Visitors: 25%

- **Total Visitors**
  - First Time Visitors: 93%
  - Repeat Visitors: 7%

**Visitor Growth Trend**

Robust growth out of India is expected to continue with total arrivals forecast to reach 108K by 2024.

- **Indian Arrivals (000)**
  - Total Arrivals: +18% on LY
  - Holiday Arrivals: +15% on LY

**2018-2024 Indian Arrivals Forecast to Grow at 8.3% per annum to 108K**

Sources: Statistics New Zealand International Travel and Migration; MBIE International Visitor Forecasts; MBIE International Visitor Survey
INDIA
VISITOR PROFILE

Independent Professionals make up over half of holiday arrivals and there is a skew to the younger end of this segment.

AGE PROFILE OF HOLIDAY VISITORS

8%
YOUTH
Ages 18-24

55%
INDEPENDENT PROFESSIONALS
Ages 25-54

28%
ACTIVE BOOMERS
Ages 55-74

VISITOR ROUTES

With no nonstop air services from India to New Zealand, most visitors arrive via Australia or South East Asian ports.

NEARLY THREE QUARTERS OF INDIAN HOLIDAY VISITORS COME VIA SINGAPORE OR AUSTRALIA

CHINA 3%
HONG KONG 10%
BANGKOK 5%
KUALA LUMPUR 6%
SINGAPORE 34%
AUSTRALIA 37%

NUMBER OF VISITORS

2000
1500
1000
500
0

AGE
10 20 30 40 50 60 70 80
INDIA
VISITOR TRAVEL SEASONS

Indian holiday visitors favour summer and autumn with May being a popular month helping boost arrivals in the late autumn shoulder.

HOLIDAY VISITOR ARRIVALS BY SEASON

- **ARRIVE IN SUMMER**: 35%
- **ARRIVE IN AUTUMN**: 31%
- **ARRIVE IN WINTER**: 9%
- **ARRIVE IN SPRING**: 25%

MONTH OF ARRIVAL

- **TOTAL**
- **HOLIDAY**

<table>
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<tr>
<th>Month</th>
<th>April 17</th>
<th>May 17</th>
<th>June 17</th>
<th>July 17</th>
<th>Aug 17</th>
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INDIA
ACTIVE CONSIDERERS

Active Considerers are what we call our target audience. These people are aged 18-74, they are classified as being in a higher socio economic position, they are aware of New Zealand, and it is a preferred destination to visit for a holiday in the next three years. They also indicate that they are prepared to spend INR 120k per person on their holiday.
Active considerers from India want to come to New Zealand to get in touch with nature and explore new things. To help our visitors achieve this, we need to communicate how easy it is to travel around and how welcoming the locals are.

**WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?**

- To get in touch with nature: 67%
- To explore and learn new things: 60%
- To indulge and pamper myself: 51%
- To broaden my mind: 44%

**WHAT DO THEY NEED MORE INFORMATION ABOUT?**

- How safe it is from crime: 40%
- How welcoming the locals are: 36%
- How easy it is to travel around: 35%
- How to interpret this data: 36% of Active Considerers said they wanted to know more about how welcoming the locals are
India

Active Considerer Profile

For our Indian Active Considerers, New Zealand is in the competitive set including destinations such as Australia, Switzerland, USA, Singapore, and the UK. Our strengths are our clean and unpolluted environment as well as our landscapes & scenery.

What Indians Know Us For

- Clean & unpolluted
- Landscapes & scenery
- Affordable activities

Messages We Need to Communicate More

- Unique experiences
- Easy to travel around
- Friendly people
- Range of experiences
INDIA

ACTIVE CONSIDERER INDEPENDENT PROFESSIONAL PROFILE

Independent Professionals are people aged 25-54 years old. They are the largest segment within our Active Considerer target audience, making up 84% of our target audience.

WHAT DO THEY NEED MORE INFORMATION ABOUT?

WHERE SHOULD I GET INFORMATION ABOUT
HOW TO ORGANISE A HOLIDAY
37%

HOW SAFE IT IS TO PARTICIPATE IN ADVENTURE ACTIVITIES
36%

HOW WELCOMING THE LOCALS ARE
36%

HOW SAFE IT IS FROM CRIME
41%

WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY

TO GET IN TOUCH WITH NATURE
65%

TO EXPLORE AND LEARN NEW THINGS
61%

TO INDULGE AND PAMPER MYSELF
53%

TO BROADEN MY MIND
43%

HOW TO INTERPRET THIS DATA

36% of Active Considerers said they wanted to know more about how welcoming the locals are.

GENDER SKews MALE

INDEPENDENT PROFESSIONALS ARE MORE LIKELY TO BE TERTIARY QUALIFIED

INDEPENDENT PROFESSIONALS HAVE A HIGHER HOUSEHOLD INCOME

<table>
<thead>
<tr>
<th>Income Level</th>
<th>Active Considerers (AC)</th>
<th>Non-Active Considerers (NON-AC)</th>
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</thead>
<tbody>
<tr>
<td>&gt; 601K INR</td>
<td>78%</td>
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</tr>
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<td>376K - 601K INR</td>
<td>11%</td>
<td>19%</td>
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<td>151K - 376K INR</td>
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<tr>
<td>&lt; 151K INR</td>
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