INTRODUCING WALKING AND HIKING

This report provides an overview of international tourists that participate in walking and hiking as an activity during their visit to New Zealand. Walking and hiking is a popular tourist activity which offers tourists a unique experience to get ‘up close and personal’ with New Zealand’s stunningly diverse and impressive landscapes. New Zealand offers thousands of kilometres of walking tracks throughout both the North and South Islands, suitable for all abilities. From short ambles through lush sub-tropical forest to world class four day hikes, on one of New Zealand’s world-renowned, Great Walks, there are endless options.

Walking and hiking tourists are defined as international visitors, aged 15 years and over, who participate in some form of walking or hiking activity (over and above a ½ hour bushwalk) at least once while travelling in New Zealand. As a priority Special Interest sector, Tourism New Zealand is committed to growing this segment through key marketing channels.

TRENDS IN WALKING AND HIKING TOURISM

How many tourists walk or hike while in NZ?

Typically one in four holiday visitors during the last five years participated in a walking or hiking activity during their visit to New Zealand. This equates to over a million international visitors, at an average of 254,000 per year.

Although Figure 2 suggests walking and hiking numbers have been declining over the last 2 years, with a slight peak in 2011, it is fair to say that walking and hiking remains a key driver of economic growth within the tourism industry. Those visitors travelling to New Zealand for walking and hiking are staying longer and are well above the total average spend of all holiday visitors.

Contributions and support by industry partners, new marketing initiatives and international promotion of New Zealand as a walking and hiking destination will all help to increase international visitor numbers within this sector. This collaboration of effort has the potential to produce significant growth opportunities for walking and hiking in New Zealand.

How much do walking and hiking tourists spend on their trip in New Zealand?

Walking and hiking travellers spend significantly more than a typical visitor during their trip to New Zealand.

On average international tourists that participate in walking and hiking spend $3,600 compared to the $2,800 average spend of all holiday visitors. There is a significant high value segment in the walking and hiking sector with over 20% of international tourists saying they spend over $5,000 on their visit to New Zealand.
Where do international tourists go walking and hiking?

The graph below looks at where international tourists were walking and hiking over the last 5 year period. The South Island hosts six of New Zealand’s ‘Great Walks’ so it’s no surprise that Mackenzie (72,800), the West Coast (50,800) and Fiordland (35,700) all feature in the top ten. Visitor numbers for this sector are dominant in the South Island with Wanaka (31,100), Canterbury (30,700), Queenstown (29,400), and Marlborough (24,300) representing a large proportion. Other popular regions include Lake Taupo (46,100), Ruapehu (31,500) and Auckland (28,000).

Figure 4: Where international tourists go walking and hiking, 2009-131

Which of New Zealands National parks are most visited by international walking and hiking tourists?

New Zealands National Parks are a key destination activity for walkers and hikers, showcasing the best of New Zealand’s lanscapes and scenery. The graph below highlights which of these National Parks are the most popular.

Figure 5: National Parks Visited, H2 – 20134

CHARACTERISTICS OF WALKING AND HIKING TOURISTS

Where do walking and hiking tourists come from?

Over the last five years international markets which provide the most walking and hiking tourists to New Zealand per year include, Australia (74,400), USA (28,900) and England (26,800). Other key contributing markets include Germany (23,500), Japan (13,300), and the Netherlands (9,200). Western markets dominate participation in walking and hiking tourism.

Figure 5: Where walking and hiking tourists come from, 2009-131

As a proportion of total market visitation, western countries show the highest propensity to participate in walking and hiking while in New Zealand. 67% of visitors from the Netherlands walk or hike in New Zealand, followed by Switzerland (59%), Germany (59%) and France (58%). The middle groups include Ireland (38%) England (34%) and Canada (31%) while rounding out the top 10 are the USA (29%), Japan (29%) and Singapore (25%).

Figure 6: Propensity of International walking and hiking tourists by Market, 2009-131
What is the age profile of walking and hiking tourists?

The age profile of international walking and hiking visitors’ highlights a strong youth segment with 49% aged 15 to 34. The largest walking and hiking demographic is 25-34 which alone accounts for 32%. Overall, walking and hiking shows clearly that there is a independent tourist segment bias, with a more youthful demographic travelling without children or dependants.

There is a slight bias towards males with 51% of international walking and hiking tourists being male to 49% female.

Figure 7: Age of walking and hiking tourists, 2009-13

![Age Profile Chart]

What are the travel styles of international walking and hiking tourists?

International walking and hiking tourists are predominantly independent travellers (89%). The rest of the split are those that travel either as part of a tour group (4%) or as part of a package deal (7%).

Figure 9: Travel style, 2009-13

![Travel Style Chart]

What are the digital trends of walking and hiking tourists?

Walking and hiking visitors to newzealand.com stay longer and view more content than the average organic visitor. The average visit time is 13:04 and walking and hiking visitors will view 10.3 pages on average. Proportionally more walking and hiking traffic hits the site in late winter and early spring.

With the majority of the Great Walks situated in the South Island, this causes a slight bias at 52% of international visitors searching regions here rather than in the North. The top five searched for locations include; Auckland, Queenstown, Fiordland, Rotorua and the Coromandel.

What other content do walking and hiking visitors to newzealand.com view?

An analysis of digital data suggests walking and hiking visitors are much more likely to use the “Travel Guide” section of the site, with particular interest in self-drive, currency and geography information.

Walking and hiking visitors are more likely to be interested in activities such as boat cruises, volcanic/geothermal activities and cycling tours than the average visitor. The most popular listed activities searched by walking and hiking tourists were based around Middle Earth, adventure tourism, backpacking and nature and wildlife activities. An overall trend is that walking and hiking tourists are researchers and tend to search and gather information on activities.

Image: Routeburn Track, Key Summit.
Who do walking and hiking tourists travel with?
International walking and hiking tourists are predominantly travelling as a couple (40%). Walking and hiking also presents a significant segment of visitors that travel alone (27%), above the average (24%). Walkers and hikers are less likely to travel with family and friends (1%), Family Whanau (10%) or Tour Group (4%), but are more likely to travel with friends (14%) than the total international holiday arrivals average (11%). As with the age profile (see Fig 7) this graph highlights a preference to travel as a couple, without children or dependants.

Figure 10: People travelled with, 2009-13

55% of international walking and hiking tourists travelled in a pair, matching figures and statements from above. 27% travelled alone, 5% as three people, 4% as a four but 8% travelled as a group of 5 or more.

Figure 11: The number of people travelled with, 2009-13

What are the main purposes of travel for walking and hiking tourists?
International walking and hiking tourists are predominantly holiday visitors (71%). There is also a portion of VFR (Visiting Friends and Relatives) making up 17% of the market. 4% of visitors are here primarily for Education, while 3% of walkers and hikers are visiting New Zealand for business (as their main purpose of visit).

Figure 12: Purpose of visit, 2009-13

How long do international walking and hiking tourists stay in New Zealand?
Because walking and hiking tourists are generally from Western markets (who stay in New Zealand longer than the average) their length of stay is significantly longer. Walking and hiking activity can require longer stay days due to the hikes themselves having a set duration, which then additionally requires further days travelling to and from the track location. Over 40% stay more than 20 nights, compared to only 17% of total holiday arrivals.

Figure 13: Length of stay, 2009-13
What accommodation do walkers and hikers use?
The most common accommodation types used by walking and hiking visitors are hotels (51%) followed by backpackers and hostels (39%). Other accommodation used included motels (34%) and holiday parks/camping grounds (32%). Private dwellings (23%) and guest and hosted (18%) were followed by and DOC sites (15%). There is additional evidence of a growing luxury market with almost 9% of this segment choosing to stay in resorts, luxury lodges and retreats.

Image: Hooker Valley, Aoraki / Mt Cook

![Image: Hooker Valley, Aoraki / Mt Cook](image)

What transport do walking and hiking tourists use?
The most common transport option used by walking and hiking tourists was a car/van (60%). Both scheduled coach services (45%) and commercial ferry or boat (42%) are significantly higher than the international visitor average. Aeroplanes (28%) and car tour/taxi (26%) are both also slightly above average. The campervan/motorhome transport option is significantly higher among walkers and hikers at 17%, however coach tours (15%) are well below the average.

Figure 15: Top ten activities walking and hiking tourists over index on, 2009-13 *1

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percent of Tourists</th>
</tr>
</thead>
<tbody>
<tr>
<td>(3%) Climbing</td>
<td></td>
</tr>
<tr>
<td>(10%) Cycle Sports</td>
<td></td>
</tr>
<tr>
<td>(24%) Canoeing, Kayaking, Rafting</td>
<td></td>
</tr>
<tr>
<td>(11%) Whale Watching</td>
<td></td>
</tr>
<tr>
<td>(11%) Sky Diving/Parachuting</td>
<td></td>
</tr>
<tr>
<td>(16%) Swimming</td>
<td></td>
</tr>
<tr>
<td>(30%) Wildlife Encounters</td>
<td></td>
</tr>
<tr>
<td>(17%) Dolphin Watching</td>
<td></td>
</tr>
<tr>
<td>(25%) Bird Watching</td>
<td></td>
</tr>
<tr>
<td>(5%) Horse Trekking/Riding</td>
<td></td>
</tr>
</tbody>
</table>

What other activities do walkers and hikers participate in?
International walking and hiking visitors show a strong preference for sporting related activities. Cycling is very popular with walkers and hikers. Other activities walkers and hikers are more likely to participate in than a typical visitor are, climbing, cycle sports, canoeing/kayaking/rafting, whale watching, sky diving/parachuting, swimming and other wildlife encounters. Not surprisingly they are also into dolphin and bird watching and they additionally enjoy horse trekking/riding (see Fig15).

Figure 14: Accommodation used, 2009-13 *1

![Figure 14: Accommodation used, 2009-13 *1](image)

Figure 16: Transport used, 2009-13 *1

![Figure 16: Transport used, 2009-13 *1](image)

How satisfied are international walking and hiking tourists?
New Zealand typically provides a high level of satisfaction for all international holiday tourists and this is no different for walkers and hikers. Walking and hiking supports an average satisfaction rating of 9 across all markets. Most markets represented in Figure 17 (below) show a higher than average satisfaction rating. France and USA both offer the highest average of 9.3, from a possible 10. This suggests that the product on offer is meeting and exceeding tourist expectations.
TOURIST SPECIAL INTEREST | WALKING AND HIKING

Figure 17: Average satisfaction ratings of walking and hiking tourists, 2008-12.

![Average satisfaction ratings of walking and hiking tourists, 2008-12](image)

**SIZING THE OPPORTUNITY FOR WALKING AND HIKING TOURISM**

**The Active Considerer**

The Active Consider (AC) is Tourism New Zealand’s global target audience. The active considerer is defined as being aware of New Zealand, find New Zealand a highly appealing travel destination, are seriously considering visiting New Zealand in future, have New Zealand as one of their preferred destinations for their next holiday and are willing to spend a certain amount on a trip to New Zealand.

It is with this audience that Tourism New Zealand has tested the appeal of walking and hiking as a holiday activity and the association of New Zealand as a destination for walking and hiking.

**Size of the potential active considerer - walking and hiking tourism population**

In terms of markets with the largest populations of active considerers who state they are personally interested in and would specifically travel for a walking or hiking holiday, China (6.6 million ACs) and the USA (4.9 million) represent the largest potential markets, followed by Germany (1.0m), UK (1 m), Australia (0.8 m) and Japan (0.8m).

![Estimated size of AC Population that are personally interested in and would specifically plan travel for a holiday that involves walking and hiking (m).](image)

**Consideration of New Zealand for a walking and/or hiking holiday**

In Japan 92% of active considerers interested in walking & hiking state that New Zealand would be their single most preferred destination or on their holiday shortlist. This is followed by China (88%), Australia (88%) and Germany (83%).

![% of ACs interested in walking and hiking who would consider travelling to New Zealand.](image)

DATA SOURCES

*1 IVS: International Visitor Survey, YE Jun 2009 - YE Jun 2013
*2 newzealand.com analytics via Adobe Site Catalyst
*3 Tourism New Zealand – Active Considerer Monitor, Dec 2012 - Feb 2013
*4 IVS: International Visitor Survey, H2 - 2013