



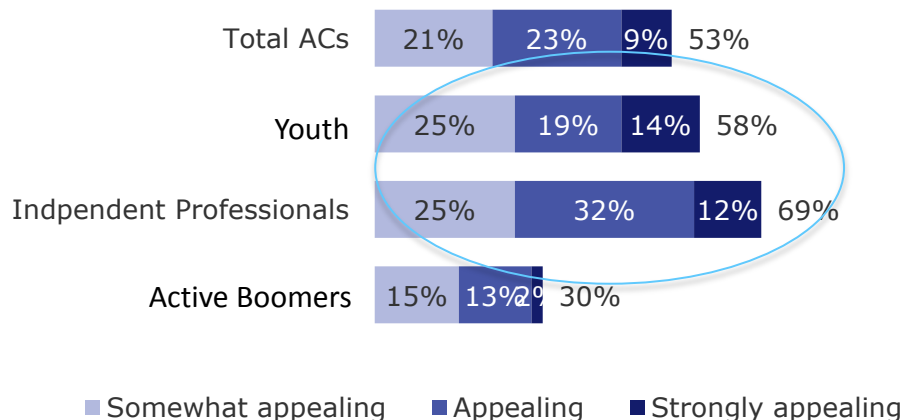
RESEARCH SUMMARY - CYCLING  
AUSTRALIAN ACTIVE CONSIDERERS MAY 2014



**100% PURE  
NEW ZEALAND**

# RESEARCH SUMMARY - HIGHLIGHTS

- Cycling has high appeal, but only low participation - potential to increase cycling trails as an activity among Australian visitors
- Greatest potential is among Youth being 18-29 year olds and Independent Professionals 30-49 year olds
- The challenge is to convert those with moderate interest into actual participation as they tend to be inexperienced cyclists, therefore promoting itineraries that alternate cycling days with days doing other activities will be of broader appeal than itineraries that focus on only daily cycling
- Key hooks when promoting specific trails should be the spectacular scenery, cafes & restaurants and towns that are featured along a trail. Other opportunities to explore should also be highlighted such as historic routes, wineries and geothermal areas
- Hard core Mountain Biking trails will attract a more niche market who are interested in cycling everyday



# PROVIDE USEFUL & PRACTICAL INFORMATION

EASY ACCESS TO PRACTICAL INFORMATION WILL BE REQUIRED TO CONVERT GENERAL INTEREST INTO ACTUAL PARTICIPATION

- Provide easy access to practical information such as what is required to be prepared, distance, duration and grading – this is particularly important to less experienced cyclists
- Key landscape features and key activities or places to explore should also be highlighted as this appeals to broader experience rather than just cycling

Usefulness of information in deciding whether include a cycle trail in a holiday (% ACs who consider NZ appealing for cycling)<sup>(1)</sup>



1. Rated on a 7 point scale where 1 is 'not at all useful' and 7 is 'extremely useful', % indicating aspect to be 'extremely useful'

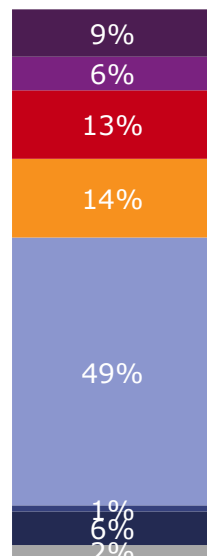


# EXPERIENCE CYCLISTS ARE INDEPENDENT PROFESSIONALS

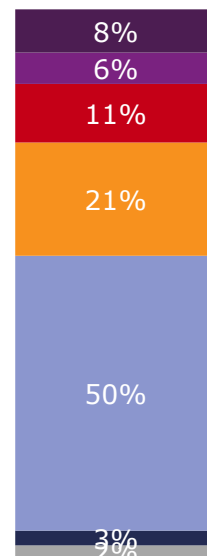
JUST OVER A QUARTER OF ACS (28%) CLASSIFY THEMSELVES AS EXPERIENCED CYCLISTS, INCREASING TO 46% AMONG INDEPENDENT PROFESSIONALS; AND OVER 60% OF AUSTRALIAN VISITORS ARE INEXPERIENCED CYCLISTS

### Cycling Ability (% ACs)

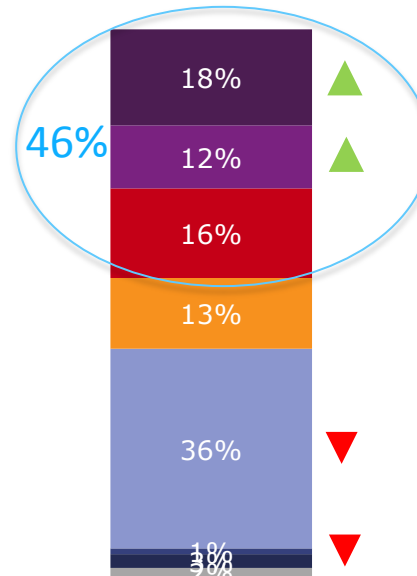
- Hard-core cyclist who travels to be in cycling events
- Experienced cyclist who enjoys off-road trail riding and trips
- Experienced cyclists who likes to cycle to keep myself active
- Not very experienced but go on occasional cycling trips
- Can cycle but don't do so very often
- Would like to learn how to cycle
- No interest in learning how to cycle
- Don't know



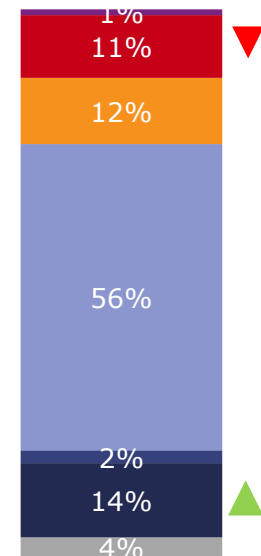
All ACs



Youth  
18-29



Independent  
Professionals  
30-49



Active  
Boomers  
55-74

% Experienced /  
Hard-core Cyclists

28%

25%

46%

12%

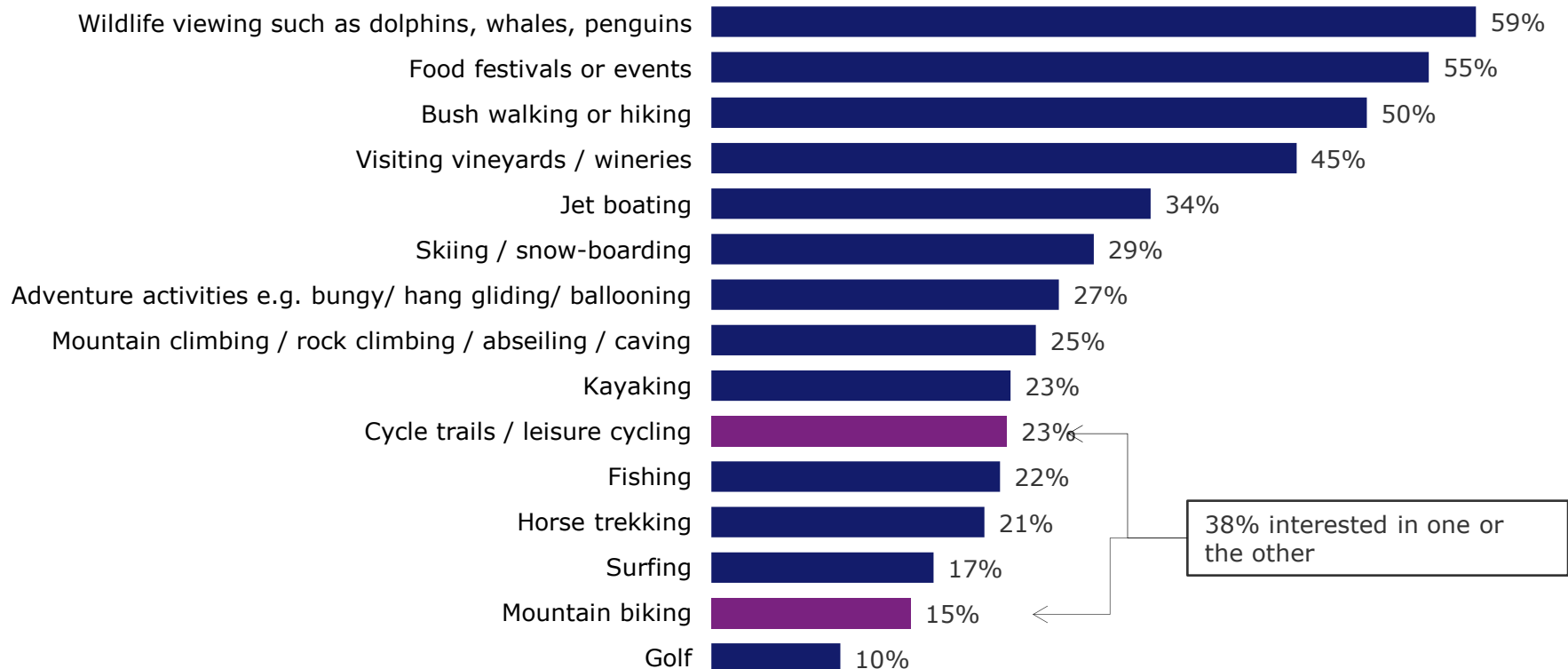
Base: All ACs n = 250, Young Adventurers n = 37, Independent Professionals n = 95, Silver Surfers n = 93

▲ ▼ Significantly higher / lower than other groups combined at 90% CI



# ACTIVITIES OF INTEREST DURING A NEW ZEALAND HOLIDAY

23% OF ACTIVE CONSIDERERS WOULD BE INTERESTED IN CYCLE TRAILS/LEISURE CYCLING, 15% IN MOUNTAIN BIKING



Base: All ACs n = 250



**100% PURE**  
**NEW ZEALAND**



# LEVERAGE OTHER ACTIVITIES SUCH AS WILDLIFE, FOOD AND BUSH WALKS TO ATTRACT POTENTIAL CYCLISTS

THERE IS HIGHER INTEREST IN CYCLING ACTIVITIES DURING A NEW ZEALAND HOLIDAY THAN ACTUAL PARTICIPATION, HIGHLIGHTING THE POTENTIAL TO GROW THIS ACTIVITY

- Interest in participating in cycling trails or mountain biking during a New Zealand holiday is over twice the level of current participation - highlighting the potential to significantly increase cycling activities among Australian visitors
  - Interest is highest for cycle trails (at 23%) while mountain biking is more niche (at 15%)
- Wildlife viewing, bush walking / hiking and food festivals are the other activities those interested in cycling would most like to also participate in followed by snow sports, jet boating and kayaking
  - This suggests that cycling itineraries could have greater appeal if secondary activities are included and/or highlighted



# THE ROLE OF OUR NEW ZEALAND CYCLE TRAILS

---

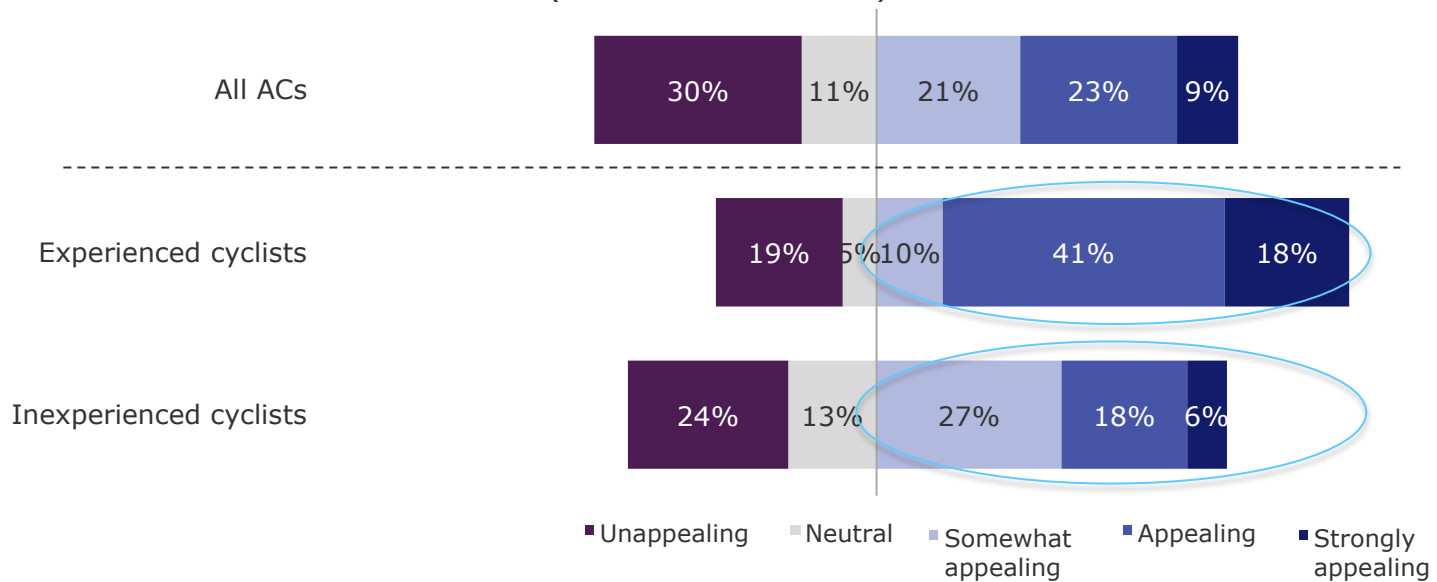
- General appeal of New Zealand as a destination for cycling trails or mountain biking tracks as part of a holiday quite broad – being at least somewhat appealing to 50% of our potential target market of Australian visitors
- This group also skews towards the under 40 age group and experienced or active cyclists within the
- Most are interested in cycle trails graded as either ‘easy’ or ‘intermediate’ with limited interest in ‘advanced’ or ‘expert’ graded trails – the focus therefore should be on promoting easier trails to the broader audience and taking a more focused approach in promoting more challenging trails
- Both the shoulder periods of October-November, as well as March-April are considered suitable times for a cycling holiday
- There is a wide range of information which is considered highly useful in deciding whether to include a cycle trail in a holiday – but in particular provide easy access to practical information such as what is required to be prepared, distance and duration alongside key landscape features and key activities or places to explore
- The features which are seen to be most influential in deciding whether to book a particular cycle trail are the scenery, cafes & restaurants and towns that the trail passes through. However, features such as geothermal areas, wineries and historic routes are also influential for many. Therefore highlighting these key features when promoting a trail is likely to most successfully build interest



# EXPERIENCED CYCLISTS HAVE MUCH GREATER APPEAL OF NEW ZEALAND CYCLE TRAILS

- 50% of inexperienced cyclists and 60% of experienced cyclists find our cycle trails somewhat – strongly appealing
- Given inexperienced cyclists make up over 60% of our potential visitors it is worthwhile appealing to these people through making cycling in New Zealand one of their great experiences while on holiday, but it may not be the primary reason for their holiday

Appeal of New Zealand for cycling trails and mountain biking – by cycling skills  
(% Active Considerers)



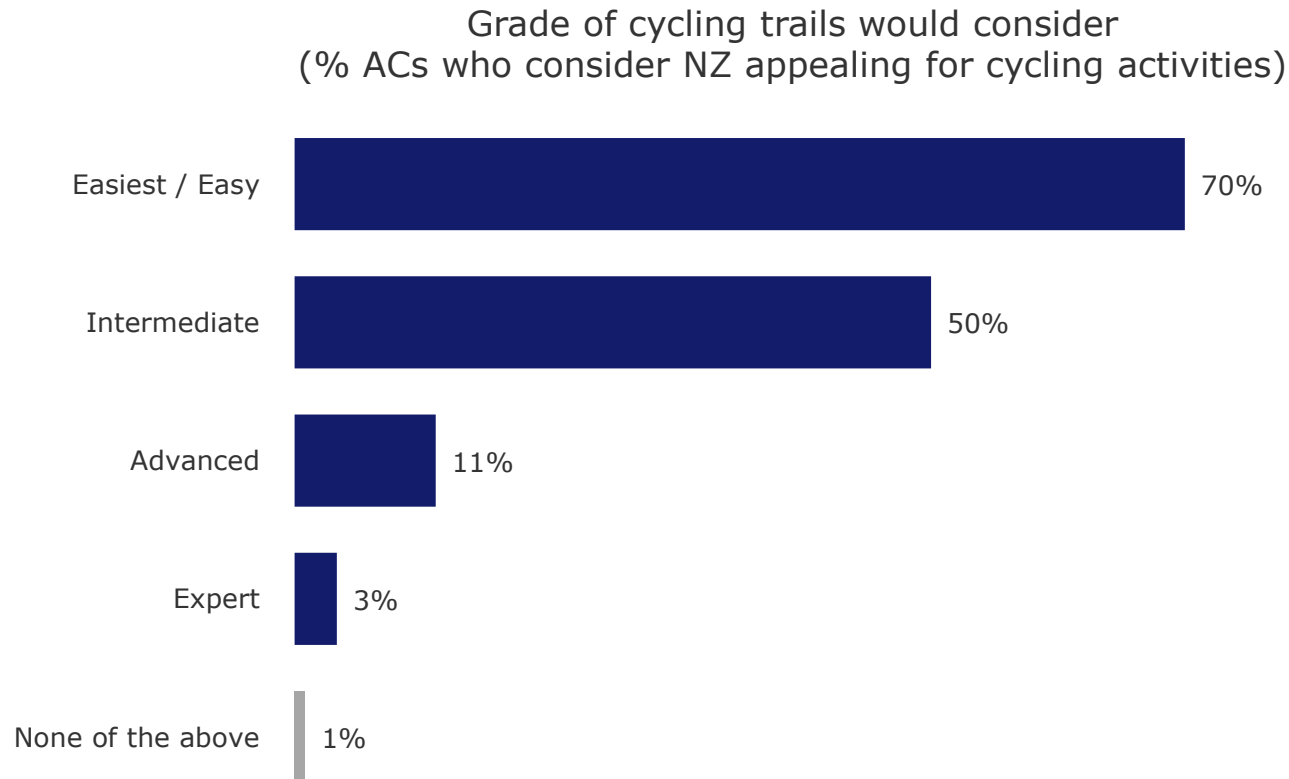
Base: All ACs n = 250, Experienced cyclists n = 69, Inexperienced cyclists n = 160





# REASSURE POTENTIAL VISITORS THAT OUR CYCLE TRAILS ARE FOR ALL LEVELS

MOST AUSTRALIAN VISITORS ARE MORE INTERESTED IN EASY AND INTERMEDIATE CYCLE TRAILS



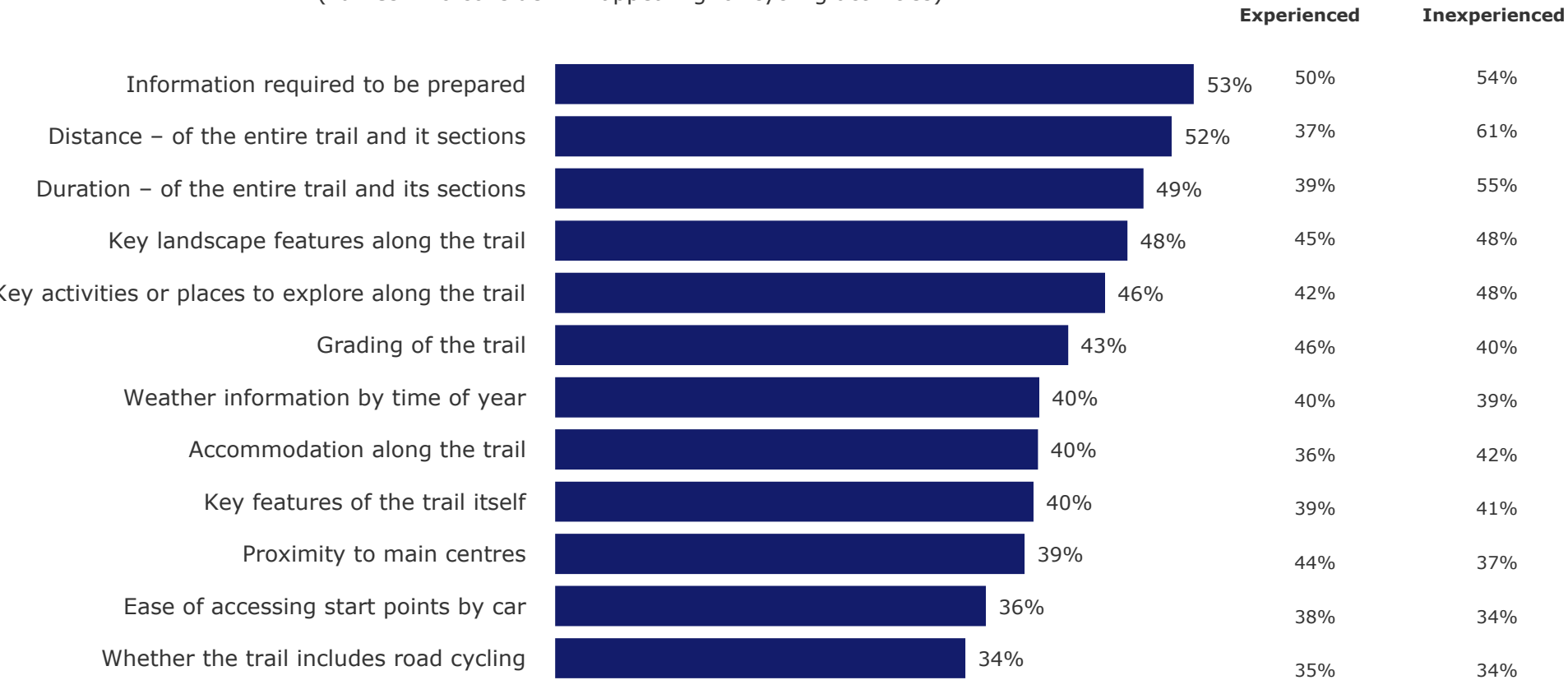
Base: Consider New Zealand appealing for cycling activitiesn = 129



**100% PURE  
NEW ZEALAND**

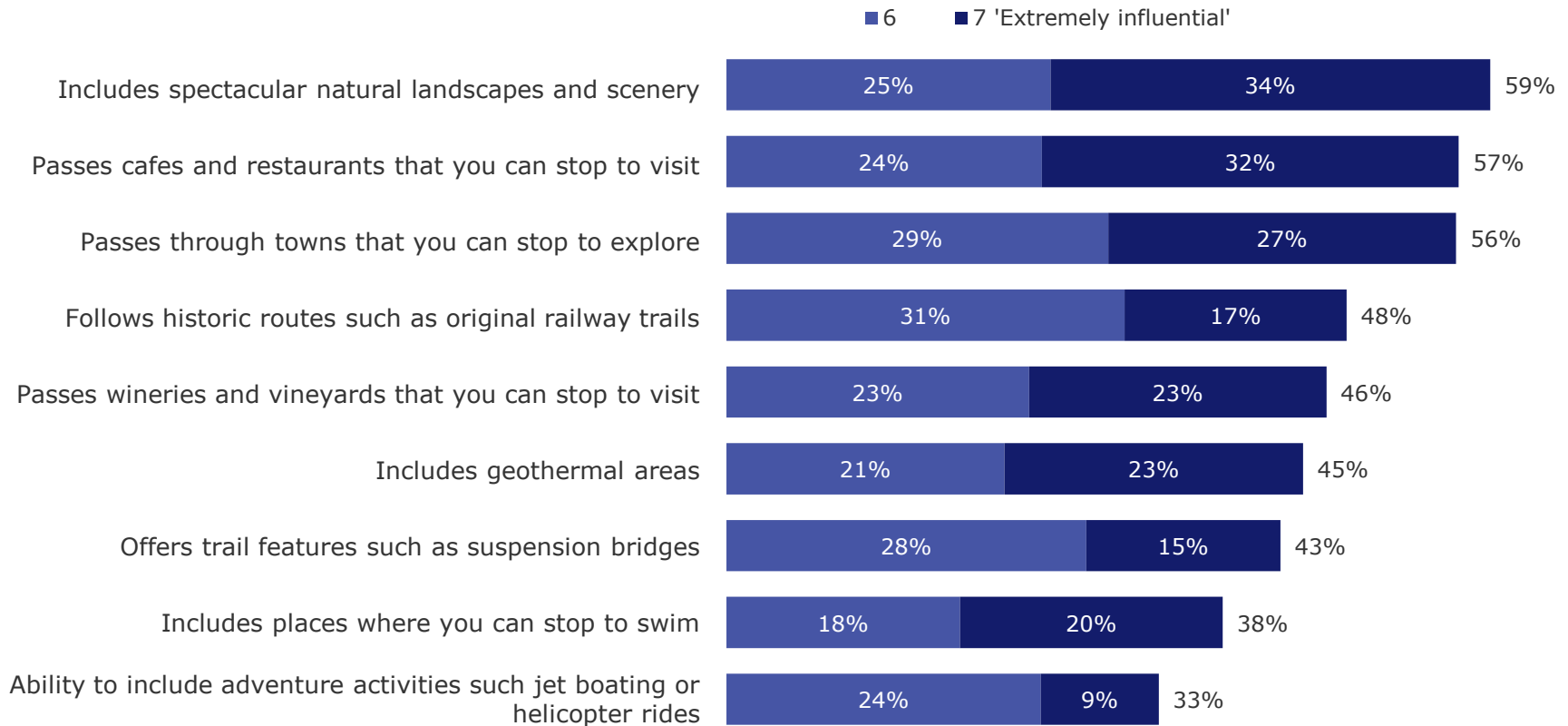
# WHAT INFORMATION VISITORS ARE INTERESTED IN WHEN PLANNING TO INCLUDE CYCLING IN THEIR HOLIDAY

Usefulness of information in deciding whether include a cycle trail in a holiday  
 (% ACs who consider NZ appealing for cycling activities)<sup>(1)</sup>



# THE BIGGEST INFLUENCERS WHEN PLANNING TO INCLUDE A CYCLE TRAIL IN A HOLIDAY – SCENERY, CAFES & TOWNS

Influence of features in deciding whether to book a particular cycle trail in New Zealand  
 (% ACs who consider NZ appealing for cycling activities)<sup>(1)</sup>



Base: Consider New Zealand appealing for cycling activitiesn = 129  
 1. Rated on a 7 point scale where 1 is 'not at all influential' and 7 is 'extremely influential'





Autumn in Queenstown



---

THANK YOU



**100% PURE  
NEW ZEALAND**