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.

### Total ACs

- Somewhat appealing: 9%
- Appealing: 23%
- Strongly appealing: 21%
- Total: 53%

#### Youth

- Somewhat appealing: 19%
- Appealing: 14%
- Strongly appealing: 25%
- Total: 58%

#### Independent Professionals

- Somewhat appealing: 12%
- Appealing: 32%
- Strongly appealing: 25%
- Total: 69%

#### Active Boomers

- Somewhat appealing: 30%
- Appealing: 13%
- Strongly appealing: 15%
- Total: 68%
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

<table>
<thead>
<tr>
<th>Information to be prepared</th>
<th>53%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Distance</td>
<td>52%</td>
</tr>
<tr>
<td>Duration</td>
<td>49%</td>
</tr>
<tr>
<td>Key landscape features</td>
<td>48%</td>
</tr>
<tr>
<td>Key activities or places to explore</td>
<td>46%</td>
</tr>
<tr>
<td>Grading of the trail</td>
<td>43%</td>
</tr>
<tr>
<td>Weather info by time of year</td>
<td>40%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>40%</td>
</tr>
<tr>
<td>Key features of the trail</td>
<td>40%</td>
</tr>
<tr>
<td>Proximity to main centres</td>
<td>39%</td>
</tr>
<tr>
<td>Ease of accessing start points</td>
<td>36%</td>
</tr>
<tr>
<td>Whether includes road cycling</td>
<td>34%</td>
</tr>
</tbody>
</table>

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

% Experienced / Hard-core Cyclists
- All ACs: 28%
- Youth 18-29: 25%
- Independent Professionals 30-49: 46%
- Active Boomers 55-74: 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

- Wildlife viewing such as dolphins, whales, penguins: 59%
- Food festivals or events: 55%
- Bush walking or hiking: 50%
- Visiting vineyards / wineries: 45%
- Jet boating: 34%
- Skiing / snow-boarding: 29%
- Adventure activities e.g. bungy/ hang gliding/ ballooning: 27%
- Mountain climbing / rock climbing / abseiling / caving: 25%
- Kayaking: 23%
- Cycle trails / leisure cycling: 23%
- Fishing: 22%
- Horse trekking: 21%
- Surfing: 17%
- Mountain biking: 15%
- Golf: 10%

38% interested in one or the other

Base: All ACs n = 250
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 trial 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)

<table>
<thead>
<tr>
<th>Cyclists Type</th>
<th>Unappealing</th>
<th>Neutral</th>
<th>Somewhat appealing</th>
<th>Appealing</th>
<th>Strongly appealing</th>
</tr>
</thead>
<tbody>
<tr>
<td>All ACs</td>
<td>30%</td>
<td>11%</td>
<td>21%</td>
<td>23%</td>
<td>9%</td>
</tr>
<tr>
<td>Experienced cyclists</td>
<td>19%</td>
<td>6%</td>
<td>10%</td>
<td>41%</td>
<td>18%</td>
</tr>
<tr>
<td>Inexperienced cyclists</td>
<td>24%</td>
<td>13%</td>
<td>27%</td>
<td>18%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

Grade of cycling trails would consider
(% ACs who consider NZ appealing for cycling activities)

- Easiest / Easy: 70%
- Intermediate: 50%
- Advanced: 11%
- Expert: 3%
- None of the above: 1%

Base: Consider New Zealand appealing for cycling activities n = 129
## WHAT INFORMATION VISITORS ARE INTERESTED IN WHEN PLANNING TO INCLUDE CYCLING IN THEIR HOLIDAY

<table>
<thead>
<tr>
<th>Information Required</th>
<th>Experienced</th>
<th>Inexperienced</th>
</tr>
</thead>
<tbody>
<tr>
<td>Information required to be prepared</td>
<td>53%</td>
<td>50%</td>
</tr>
<tr>
<td>Distance – of the entire trail and its sections</td>
<td>52%</td>
<td>37%</td>
</tr>
<tr>
<td>Duration – of the entire trail and its sections</td>
<td>49%</td>
<td>39%</td>
</tr>
<tr>
<td>Key landscape features along the trail</td>
<td>48%</td>
<td>45%</td>
</tr>
<tr>
<td>Key activities or places to explore along the trail</td>
<td>46%</td>
<td>42%</td>
</tr>
<tr>
<td>Grading of the trail</td>
<td>43%</td>
<td>46%</td>
</tr>
<tr>
<td>Weather information by time of year</td>
<td>40%</td>
<td>40%</td>
</tr>
<tr>
<td>Accommodation along the trail</td>
<td>40%</td>
<td>36%</td>
</tr>
<tr>
<td>Key features of the trail itself</td>
<td>40%</td>
<td>39%</td>
</tr>
<tr>
<td>Proximity to main centres</td>
<td>39%</td>
<td>44%</td>
</tr>
<tr>
<td>Ease of accessing start points by car</td>
<td>36%</td>
<td>38%</td>
</tr>
<tr>
<td>Whether the trail includes road cycling</td>
<td>34%</td>
<td>35%</td>
</tr>
</tbody>
</table>

(1) ACs: Adjusted Consensus
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)

1. Rated on a 7 point scale where 1 is 'not at all influential' and 7 is 'extremely influential'

- Includes spectacular natural landscapes and scenery
  - Extremely influential: 34%
  - Influential: 25%
  - Total: 59%

- Passes cafes and restaurants that you can stop to visit
  - Extremely influential: 32%
  - Influential: 24%
  - Total: 57%

- Passes through towns that you can stop to explore
  - Extremely influential: 27%
  - Influential: 29%
  - Total: 56%

- Follows historic routes such as original railway trails
  - Extremely influential: 17%
  - Influential: 31%
  - Total: 48%

- Passes wineries and vineyards that you can stop to visit
  - Extremely influential: 23%
  - Influential: 23%
  - Total: 46%

- Includes geothermal areas
  - Extremely influential: 23%
  - Influential: 21%
  - Total: 45%

- Offers trail features such as suspension bridges
  - Extremely influential: 15%
  - Influential: 28%
  - Total: 43%

- Includes places where you can stop to swim
  - Extremely influential: 20%
  - Influential: 18%
  - Total: 38%

- Ability to include adventure activities such as jet boating or helicopter rides
  - Extremely influential: 9%
  - Influential: 24%
  - Total: 33%

Base: Consider New Zealand appealing for cycling activities n = 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