RESEARCH SUMMARY - HIGHLIGHTS

- Cycling has high appeal, but only low participation – potential to increase cycling trails as an activity among USA visitors
- The greatest potential is among the under-45s and Independent Professionals
- Promote cycling itineraries that include other activities as this will have a broader appeal, in particularly for the inexperienced
- Key hooks when promoting specific trails should be the spectacular scenery, towns passed through, historic routes, as well as wineries, and vineyards

<table>
<thead>
<tr>
<th>Segment</th>
<th>Somewhat appealing</th>
<th>Appealing</th>
<th>Strongly appealing</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total ACs</td>
<td>27%</td>
<td>27%</td>
<td>13%</td>
</tr>
<tr>
<td>18 to 44 years</td>
<td>34%</td>
<td>36%</td>
<td>8%</td>
</tr>
<tr>
<td>Independent Professionals</td>
<td>25%</td>
<td>24%</td>
<td>20%</td>
</tr>
<tr>
<td>Organised Tourers</td>
<td>13%</td>
<td>12%</td>
<td>4%</td>
</tr>
</tbody>
</table>
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 duration, weather information, what is required to be prepared, distances and grading
- Key landscape features and key activities or places to explore should also be highlighted

Usefulness of information in deciding whether include a cycle trail in a holiday (% ACs who consider NZ appealing for cycling)\(^1\)

<table>
<thead>
<tr>
<th>Information</th>
<th>Usefulness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Duration</td>
<td>66%</td>
</tr>
<tr>
<td>Weather info by time of year</td>
<td>66%</td>
</tr>
<tr>
<td>Info required to be prepared</td>
<td>55%</td>
</tr>
<tr>
<td>Key activities or places to explore</td>
<td>52%</td>
</tr>
<tr>
<td>Distance</td>
<td>48%</td>
</tr>
<tr>
<td>Grading of the trail</td>
<td>47%</td>
</tr>
<tr>
<td>Key landscape features</td>
<td>46%</td>
</tr>
<tr>
<td>Ease of accessing start points</td>
<td>45%</td>
</tr>
<tr>
<td>Accommodation</td>
<td>42%</td>
</tr>
<tr>
<td>Proximity to main centres</td>
<td>40%</td>
</tr>
<tr>
<td>Whether includes road cycling</td>
<td>40%</td>
</tr>
<tr>
<td>Key features of the trail</td>
<td>32%</td>
</tr>
</tbody>
</table>
EXPERIENCED CYCLISTS ARE THE UNDER-45S

A QUARTER OF ACS CLASSIFY THEMSELVES AS EXPERIENCED CYCLISTS, INCREASING TO 38% AMONG THOSE AGED UNDER 45 YEARS OLD

Cycling ability (% ACs)

- Hard-core cyclist who travels to be in cycling events: 8%
- Experienced cyclist who enjoys off-road trail riding and trips: 16%
- Experienced cyclists who like to cycle to keep myself active: 21%
- Not very experienced but go on occasional cycling trips: 17%
- Can cycle but don’t do so very often: 36%
- Would like to learn how to cycle: 43%
- No interest in learning how to cycle: 23%
- Don’t know: 22%

% Experienced / Hard-core

- All ACs: 26%
- 18 to 44 years: 38%
- Independent Professionals: 19%
- Organised Tourers: 9%

Base: All ACs n = 150, 18 to 44 years n = 77, Independent Professionals n = 77, Organised Tourers n = 48

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

NEW ZEALAND
100% PURE NEW ZEALAND
ACTIVITIES OF INTEREST DURING A NEW ZEALAND HOLIDAY

35% OF ACTIVE CONSIDERERS WOULD BE INTERESTED IN CYCLE TRAILS, 17% IN MOUNTAIN BIKING

Activities of interest during a New Zealand holiday (% ACs)

- Wildlife viewing such as dolphins, whales, penguins, native birds: 76%
- Food festivals or events: 58%
- Visiting vineyards / wineries: 49%
- Bush walking or hiking: 46%
- Mountain climbing / rock climbing / abseiling / caving: 39%
- Leisure cycling/cycling trails: 35%
- Horse trekking: 31%
- Adventure activities such as bungy, hang gliding, ballooning, skydiving: 31%
- Kayaking: 30%
- Jet boating: 27%
- Fishing: 18%
- Mountain biking: 17%
- Surfing: 11%
- Golf: 10%
- Skiing / snow-boarding: 10%

43% are interested in one or the other

Base: All ACs n = 150
LEVERAGE OTHER ACTIVITIES TO ATTRACT POTENTIAL CYCLISTS

• Interest for cycle trails is at 23% and mountain biking at 7% across all Active Considerers

• Wildlife viewing, food festivals, visiting vineyards and bush walking are the other activities those interested in cycling would also like to participate in - this suggests cycling itineraries would have greater appeal if secondary activities are included and/or highlighted
THE ROLE OF OUR CYCLE TRAILS

- General appeal of New Zealand as a destination for cycling trails and mountain biking tracks as part of holiday is high, being at least 65% out of potential target markets of North American Active Considerers
- The biggest potential is the under 45s given the high portion of experienced cyclists in this age group
- Most are interested in cycle trails graded as either ‘easy’ or ‘intermediate;’ there is limited interest in ‘advanced’ or ‘expert’ graded trails. Therefore focus should be on promoting easier trails to a broader audience, and taking a focused approached in promoting more challenging trails to more experience riders?
- Both shoulder periods, 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 useful to decide whether to include a cycle trail in a holiday – particularly important is easy access to information such as duration, weather by time of year, information required to be prepared, key activities or places to explore
- The features that are the most influential in deciding whether to book a cycle trail whilst on a holiday in New Zealand are scenery, towns passed through, following historic routes, wineries and vineyards, cafes and restaurants
EXPERIENCED CYCLISTS HAVE MUCH GREATER APPEAL OF NEW ZEALAND CYCLE TRAILS

- 97% of experienced cyclists and 62% inexperienced cyclists found our cycles trails somewhat – strongly appealing
REASSURE THERE ARE CYCLE TRAILS FOR EVERY LEVEL

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

- Easiest / Easy: 69%
- Intermediate: 56%
- Advanced: 24%
- Export: 3%
- None of the above: 1%
INFORMATION INTERESTED WHEN PLANNING TO INCLUDE A CYCLE TRAIL IN A HOLIDAY

Usefulness of information in deciding whether include a cycle trail in a holiday (% ACs who consider NZ appealing for cycling activities)\(^{(1)}\)

- Duration – of the entire trail and its sections: 66%
- Weather information by time of year: 66%
- Information required to be prepared: 55%
- Key activities or places to explore along the trail: 52%
- Distance – of the entire trail and its sections: 48%
- Grading of the trail: 47%
- Key landscape features along the trail: 46%
- Ease of accessing start points by car: 45%
- Accommodation along the trail: 42%
- Proximity to main centres: 40%
- Whether the trail includes road cycling: 40%
- Key features of the trail itself: 32%

Base: Consider New Zealand appealing for cycling activities n = 86.
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’ is charted.
### Influence of features in deciding whether to book a particular cycle trail in New Zealand

<table>
<thead>
<tr>
<th>Feature</th>
<th>6 (Somewhat influential)</th>
<th>7 (Extremely influential)</th>
<th>Total (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Includes spectacular natural landscapes and scenery</td>
<td>26%</td>
<td>54%</td>
<td>80%</td>
</tr>
<tr>
<td>Passes through towns that you can stop to explore</td>
<td>36%</td>
<td>31%</td>
<td>67%</td>
</tr>
<tr>
<td>Follows historic routes such as original railway trails</td>
<td>19%</td>
<td>43%</td>
<td>62%</td>
</tr>
<tr>
<td>Passes wineries and vineyards that you can stop to visit</td>
<td>27%</td>
<td>34%</td>
<td>61%</td>
</tr>
<tr>
<td>Passes cafes and restaurants that you can stop to visit</td>
<td>26%</td>
<td>32%</td>
<td>58%</td>
</tr>
<tr>
<td>Includes places where you can stop to swim</td>
<td>27%</td>
<td>28%</td>
<td>54%</td>
</tr>
<tr>
<td>Offers trail features such as suspension bridges</td>
<td>28%</td>
<td>26%</td>
<td>54%</td>
</tr>
<tr>
<td>Ability to include other activities such jet boating or helicopter rides</td>
<td>24%</td>
<td>18%</td>
<td>42%</td>
</tr>
<tr>
<td>Includes geothermal areas</td>
<td>10%</td>
<td>21%</td>
<td>31%</td>
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