Our market infographics are drawn from two different sources.

**HISTORIC VIEW: Past Visitor Research**
This is information collected about those who have visited New Zealand. **This is the source for the Market 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).

**FUTURE VIEW: Active Considerer Research**
An Active Considerer is someone who has New Zealand in the top five of next destination choice. **This is the source of information for the Consumer Profile infographics,** helping us understand how our target audience sees New Zealand as a holiday destination.
CHINA IS OUR SECOND LARGEST TOURISM MARKET. IT IS EXPERIENCING PHENOMENAL GROWTH WITH THE TOTAL VALUE OF VISITORS APPROACHING $2 BILLION.

### Purpose of Visit

- **Visiting Friends/Relatives:** 44K
- **Business:** 13K
- **Education:** 9K
- **Conferences:** 2K
- **Other:** 21K
- **Total:** 397K

### Average Length of Stay

- **Holiday Visitors:**
  - **Holiday:** 308K
  - **Holiday Stay Days:** 2.5M
  - **Total Stay Days:** 6.7M

### Holiday Visitors

- **Repeat Visitors:** 9%
- **First Time Visitors:** 91%

### Average Spend

- **Holiday:** $4,630
- **Total:** $4,903

### Spend Contribution

- **Holiday:** $1.316B
- **Total:** $1.749B

**Sources:** Statistics New Zealand International Travel and Migration; MBIE International Visitor Forecasts; MBIE International Visitor Survey (Holiday Visitors); MBIE Regional Tourism Estimates; Sabre Market Intelligence; Immigration New Zealand
CHINA HAS BEEN A MAJOR DRIVER OF TOURISM GROWTH, ACCOUNTING FOR 26% OF ARRIVAL GROWTH AND 31% OF HOLIDAY ARRIVAL GROWTH IN THE LAST THREE YEARS.

CHINA MARKET SNAPSHOT

STRONG GROWTH FROM CHINA SET TO CONTINUE

CHINA ARRIVALS (000)

TOTAL UP 34% ON 2014

HOLIDAY UP 40% ON 2014

921K FORECAST BY 2022

HOLIDAY VISITORS

FREE INDEPENDENT TRAVELLERS

GROUP VISITORS

GROWTH IN GENERAL VISA APPLICATIONS*

GROWTH IN GROUP VISA APPLICATIONS*

25%

38%

61%

39%

* COMPARED TO LAST YEAR.
OVER HALF OF OUR CHINESE HOLIDAY VISITORS ARE INDEPENDENT PROFESSIONALS.
MAJORITY OF CHINESE HOLIDAY VISITORS COME VIA AN AUSTRALIAN PORT ALTHOUGH DIRECT AIR CAPACITY FROM CHINA TO NEW ZEALAND IS INCREASING SIGNIFICANTLY.

51% ARRIVE VIA AN AUSTRALIAN PORT
34% COME DIRECT FROM CHINA
9% COME VIA HONG KONG
4% VIA SINGAPORE

DIRECT CHINA-TO-NEW ZEALAND AIR CAPACITY IN 2016 VS. 2015 +64%

PROVINCE OF RESIDENCE

BEIJING 14%
SHANGHAI 16%
GUANGDONG 13%

OTHERS
ZHEJIANG 7%
JIANGSU 4%
SICHUAN 4%
SHANDONG 2%
LIAONING 2%
FUJIAN 2%
HUbei 2%
NOT DEFINED 19%
SUMMER IS A POPULAR TIME TO VISIT BUT CHINESE VISITOR GROWTH IN THE SHOULDER SEASONS IS VERY STRONG.

KEY TRAVEL PERIOD OF CHINESE NEW YEAR OCCURS DURING OUR SUMMER PEAK

ARRIVE IN SUMMER 33%
ARRIVE IN AUTUMN 30%
ARRIVE IN WINTER 14%
ARRIVE IN SPRING 23%

THE CHINESE HOLIDAY VISITOR GROWTH RATE IN SPRING AND AUTUMN SHOULDER SEASONS EXCEEDS THE SUMMER PEAK

SUMMER HOLIDAY ARRIVAL GROWTH VS. LAST YEAR +21%
SPRING AND AUTUMN HOLIDAY ARRIVAL GROWTH VS. LAST YEAR +41%
AUCKLAND, OTAGO AND THE BAY OF PLENTY ARE THE MOST VISITED REGIONS. AUCKLAND AND OTAGO ACCOUNT FOR MOST OF THE SPEND.
CHINA MARKET SNAPSHOT

TOP ACTIVITIES FOR CHINESE HOLIDAY VISITORS.

- MAORI CULTURAL EXPERIENCE / ACTIVITY 71%
- HOT POOLS 43%
- GEOTHERMAL PARK 67%
- SCENIC TOUR BUS OR TRAIN 43%
- BEACH 71%
- NATIONAL PARKS 69%
- OBSERVING WILDLIFE 84%
- WALK / HIKE / TRAMP 71%
- SCENIC BOAT TRIP 58%
- FARM / ORCHARD 67%
- WALK / HIKE / TRAMP 71%
- NATIONAL PARKS 69%
- OBSERVING WILDLIFE 84%
- WALK / HIKE / TRAMP 71%
- SCENIC BOAT TRIP 58%
- FARM / ORCHARD 67%
- NATIONAL PARKS 69%
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- SCENIC BOAT TRIP 58%
- FARM / ORCHARD 67%
THE MAJORITY OF CHINESE VISITORS STAY IN HOTELS WHILE IN NEW ZEALAND AND TOUR BUSES REMAIN A POPULAR OPTION FOR GETTING AROUND.

<table>
<thead>
<tr>
<th>ACCOMMODATION STAYED IN</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>HOTEL</td>
<td>68%</td>
</tr>
<tr>
<td>MOTEL / MOTOR INN / SERVICED APPT</td>
<td>34%</td>
</tr>
<tr>
<td>FAMILY AND FRIENDS</td>
<td>19%</td>
</tr>
<tr>
<td>LUXURY</td>
<td>17%</td>
</tr>
<tr>
<td>BACKPACKER / HOSTELS</td>
<td>11%</td>
</tr>
<tr>
<td>CAMPING</td>
<td>3%</td>
</tr>
</tbody>
</table>

TRANSPORT USED
Tour bus is the most popular option, although the proportion is down from 53% last year.

<table>
<thead>
<tr>
<th>TRANSPORT</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>TOUR BUS</td>
<td>48%</td>
</tr>
<tr>
<td>PLANE</td>
<td>38%</td>
</tr>
<tr>
<td>RENTAL CAR</td>
<td>33%</td>
</tr>
<tr>
<td>HELICOPTER</td>
<td>22%</td>
</tr>
<tr>
<td>TAXI / SHUTTLE</td>
<td>21%</td>
</tr>
<tr>
<td>PRIVATE CAR</td>
<td>20%</td>
</tr>
<tr>
<td>BUS SERVICE</td>
<td>12%</td>
</tr>
<tr>
<td>FERRY OR BOAT SERVICE</td>
<td>12%</td>
</tr>
<tr>
<td>COOK STRAIT FERRY</td>
<td>10%</td>
</tr>
<tr>
<td>YACHT</td>
<td>10%</td>
</tr>
</tbody>
</table>
Overall, Chinese visitors are highly satisfied with their New Zealand experience - although their satisfaction score is slightly lower than scores from key western markets.

THE MAJORITY OF CHINESE VISITORS ARE HIGHLY SATISFIED WITH THEIR NEW ZEALAND EXPERIENCE. THERE IS AN OPPORTUNITY TO EXCEED EXPECTATIONS FOR MORE CHINESE VISITORS.

<table>
<thead>
<tr>
<th>SATISFACTION</th>
<th>MEETING EXPECTATIONS</th>
</tr>
</thead>
<tbody>
<tr>
<td>8.9/10</td>
<td>95% Expectations of New Zealand experience met or exceeded</td>
</tr>
<tr>
<td></td>
<td>61% Met</td>
</tr>
<tr>
<td></td>
<td>34% Exceeded</td>
</tr>
<tr>
<td></td>
<td>4% Worse</td>
</tr>
<tr>
<td></td>
<td>1% Not sure</td>
</tr>
</tbody>
</table>

Overall, Chinese visitors are highly satisfied with their New Zealand experience - although their satisfaction score is slightly lower than scores from key western markets.

NET PROMOTER SCORE

4% DETRACTORS

78% LIKELY TO RECOMMEND NEW ZEALAND AS A DESTINATION

82% PROMOTERS

13% PASSIVE