

SPECIAL INTEREST SECTORS



Special Interest sectors focus on activities that have a high personal appeal to travellers. They can be the main reason for why they choose New Zealand as a destination, or one element of a broader New Zealand holiday. Special Interest sectors are a priority for Tourism New Zealand:

- Visitors who participate in Special Interest sectors generally have higher average spend than other visitors
- Special Interest activities encourage regional dispersal and product development
- They help drive non-peak travel having appeal over spring and autumn, and for ski winter travel

This infographic highlights behaviour of holiday visitors over the three years to March 2017. Data is sourced from the Ministry of Business, Innovation and Employment's International Visitor Survey.

WALKING & HIKING



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WALKING AND HIKING ARE POPULAR ACTIVITIES AND ENABLE VISITORS TO EXPERIENCE OUR LANDSCAPES AND SCENERY. THOSE VISITORS WHO DO LONGER WALKS VISIT FIVE TO SIX REGIONS ON AVERAGE WHICH HELPS SPREAD THEIR VALUE ACROSS THE COUNTRY.

WALKING AND HIKING ARE POPULAR ACTIVITIES FOR MANY TOURISTS WITH A RANGE OF OPTIONS FROM EASY SHORT WALKS TO MULTI-DAY GREAT WALKS

73%

OF HOLIDAY VISITORS PARTICIPATED IN WALKING/HIKING IN THE LAST THREE YEARS OR

1.1M

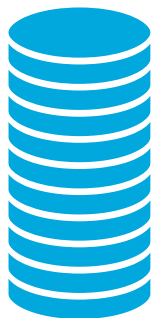
AVERAGE NUMBER PER YEAR

14%

CITE WALKING AND HIKING AS A FACTOR INFLUENCING CONSIDERATION OF NEW ZEALAND

AS THE MAJORITY OF HOLIDAY VISITORS PARTICIPATE IN A WALKING OR HIKING ACTIVITY, THE AVERAGE SPEND AND LENGTH OF STAY IS SIMILAR TO THAT OF ALL HOLIDAY VISITORS

AVG SPEND



\$4,100

VS. \$3,900 ALL HOLIDAY VISITORS

LENGTH OF STAY



**19
NIGHTS**

VS. 16 NIGHTS ALL HOLIDAY VISITORS

WALKING & HIKING



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WITH A RANGE OF WALKING OPTIONS MOST INTERNATIONAL VISITORS PARTICIPATE IN SHORT WALKS OF UP TO THREE HOURS

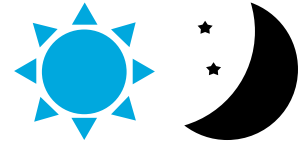
51% SHORT WALK BETWEEN
HALF HOUR & THREE HOURS

24% SHORT WALK
UNDER HALF HOUR

19% DAY WALK OVER
THREE HOURS

3% OVERNIGHT
TREK/TRAMP

8% GREAT
NZ WALK



DAY OR
OVERNIGHT WALK

23%

DAY OR MULTI-DAY WALKERS SPEND MORE AND STAY NEARLY TWICE AS LONG AS THE AVERAGE HOLIDAY VISITOR

AVG SPEND DIFFERENCE



\$4,800

VS. \$3,900 ALL HOLIDAY VISITORS

LENGTH OF STAY

31

NIGHTS

VS. 16 NIGHTS ALL HOLIDAY VISITORS

DAY AND OVERNIGHT WALKERS VISIT MORE REGIONS

REGIONS VISITED OVERNIGHT
3.5 ALL HOLIDAY VISITORS



5 - 6 REGIONS

NATIONAL PARKS VISITED
1.6 ALL HOLIDAY VISITORS



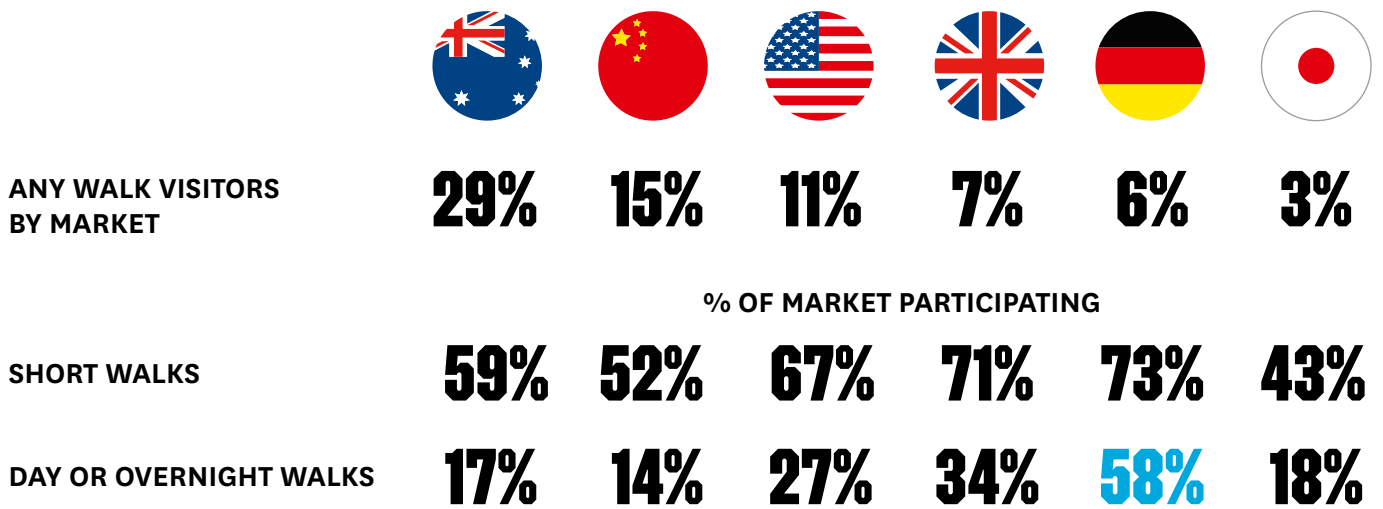
3 NATIONAL PARKS

WALKING & HIKING



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WALKING IS A POPULAR ACTIVITY ACROSS ALL MAJOR MARKETS. LONGER WALKS ARE PARTICULARLY POPULAR AMONG GERMAN AND UK VISITORS

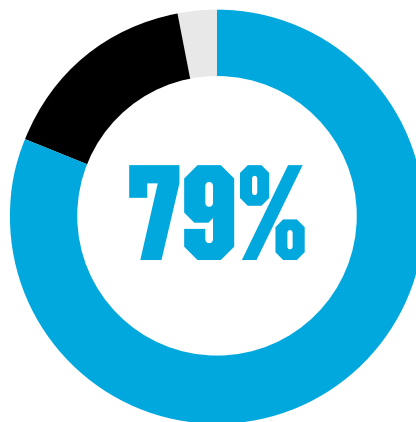


WALKERS AND HIKERS ARE HIGHLY SATISFIED WITH THEIR OVERALL NEW ZEALAND EXPERIENCE AND ARE LIKELY TO RECOMMEND NEW ZEALAND AS A DESTINATION

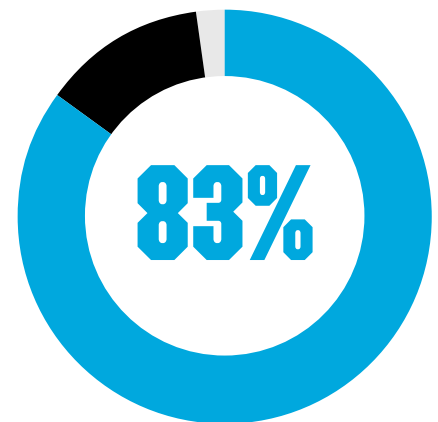
SATISFACTION OF NEW ZEALAND EXPERIENCE



NET PROMOTER SCORE ALL WALKING AND HIKING



NET PROMOTER SCORE DAY AND OVERNIGHT WALKS



● Promoters (9-10)
 ● Passives (7-8)
 ● Detractors (1-6)

CYCLING



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CYCLING IS A GROWING SPECIAL INTEREST AND A WAY TO HAVE A UNIQUE HOLIDAY EXPERIENCE. THOSE WHO CYCLE WHILE IN NEW ZEALAND TEND TO VISIT MORE REGIONS AND ARE MORE LIKELY TO ENJOY NEW ZEALAND WINE AT A VINEYARD.

CYCLING IS A SIGNIFICANT SPECIAL INTEREST ACTIVITY WITH NEARLY 10% OF HOLIDAY VISITORS PARTICIPATING IN SOME FORM OF CYCLING WHILE IN NEW ZEALAND

9%

OF HOLIDAY VISITORS PARTICIPATED
IN A CYCLING ACTIVITY IN THE LAST
THREE YEARS OR

138K

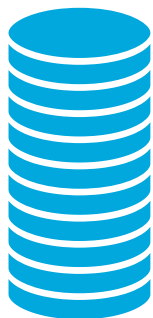
AVERAGE NUMBER OF
VISITORS PER YEAR

CYCLING IS DEFINED AS ANY OF THE BELOW:

**NZ CYCLE TRAIL
CYCLE TOURING
MOUNTAIN BIKING
OTHER CYCLING**

VISITORS WHO PARTICIPATE IN CYCLING SPEND MORE AND STAY LONGER

AVG SPEND DIFFERENCE



\$4,900

VS. \$3,900 ALL HOLIDAY VISITORS

LENGTH OF STAY

33

NIGHTS

VS. 16 NIGHTS ALL HOLIDAY VISITORS

CYCLING



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AUSTRALIA IS THE LARGEST SINGLE MARKET FOR CYCLING

CYCLING VISITORS
BY MARKET



28%



12%



10%



10%



8%



3%

CYCLING VISITORS GO TO MORE REGIONS AND ARE MORE LIKELY TO VISIT VINEYARDS AND WINERIES

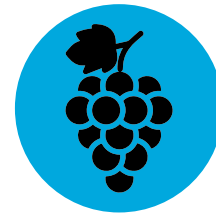
REGIONS VISITED OVERNIGHT



5 REGIONS

VS. 3.5 ALL HOLIDAY VISITORS

VISIT VINEYARDS



44%

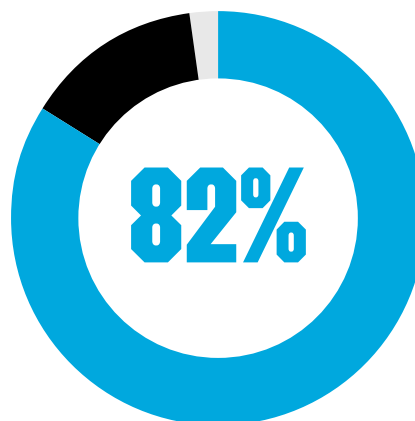
VS. 25% OF ALL HOLIDAY VISITORS

CYCLISTS ARE HIGHLY SATISFIED WITH THEIR OVERALL NEW ZEALAND EXPERIENCE AND ARE LIKELY TO RECOMMEND NEW ZEALAND AS A DESTINATION


SATISFACTION OF NEW ZEALAND EXPERIENCE




NET PROMOTER SCORE



 Promoters
(9-10)

 Passives
(7-8)

 Detractors
(1-6)

GOLF



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GOLF IS A GROWING NICHE SPECIAL INTEREST, TARGETING A HIGH VALUE VISITOR. GOLF VISITORS ALSO HAVE EXTREMELY HIGH SATISFACTION WITH THEIR NEW ZEALAND EXPERIENCE.

GOLF IS A NICHE SPECIAL INTEREST SECTOR THAT ALIGNS WITH THE PREMIUM MARKET

2%

OF HOLIDAY VISITORS GOLFED
IN THE LAST THREE YEARS OR

35K

AVERAGE NUMBER OF
HOLIDAY VISITORS PER YEAR

**NEW ZEALAND HAS A RANGE OF
WORLD CLASS MARQUEE GOLF
COURSES AND EXPERIENCE COURSES**

14
MARQUEE
COURSES

27
EXPERIENCE
COURSES

32,000

ROUNDS PLAYED BY
INTERNATIONAL VISITORS IN 2016

+17% VS. 2015

GOLFERS SPEND MORE AND STAY LONGER THAN AVERAGE HOLIDAY VISITORS

AVG SPEND

\$4,800



VS. \$3,900 ALL HOLIDAY VISITORS

**AVERAGE SPEND OF A GOLF VISITOR
FROM US APPROXIMATELY***

\$19,000



*INDUSTRY DATA OF GOLF HOLIDAY PACKAGES SOLD

LENGTH OF STAY

27

NIGHTS

VS. 16 NIGHTS ALL HOLIDAY VISITORS

GOLF



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MOST GOLFERS ARE AUSTRALIAN VISITORS

GOLF VISITORS
BY MARKET



46%



11%



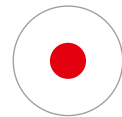
6%



7%



5%



3%

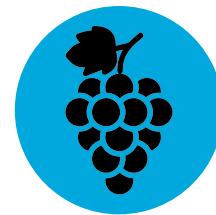
HOLIDAY VISITORS WHO PARTICIPATE IN GOLF HAVE A STRONG PROPENSITY TO VISIT VINEYARD AND WINERIES

GOLFERS ARE MORE LIKELY TO VISIT THE BELOW REGIONS



**OTAGO
WAIKATO
NORTHLAND
NELSON
HAWKES BAY**

VISIT VINEYARDS



41%

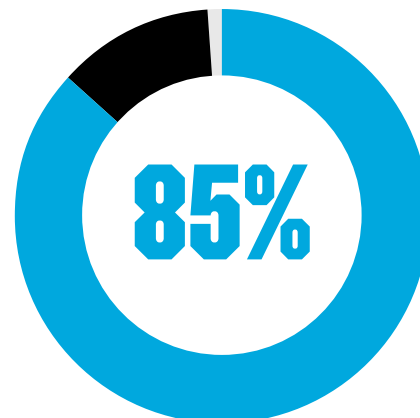
VS. 25% OF ALL HOLIDAY VISITORS

HOLIDAY VISITORS WHO GOLF ARE VERY LIKELY TO RECOMMEND NEW ZEALAND

SATISFACTION OF
NEW ZEALAND EXPERIENCE



NET PROMOTER SCORE



Promoters
(9-10)



Passives
(7-8)



Detractors
(1-6)

SKI



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SKI DRIVES WINTER TRAVEL PRIMARILY FROM AUSTRALIA BY LEVERAGING A KEY NATURAL RESOURCE AND PROVIDING A PLATFORM FOR A WINTER HOLIDAY EXPERIENCE. MANY SKIERS VISIT NEW ZEALAND MULTIPLE TIMES.

SKI IS A VITAL SECTOR TO ENSURING A STRONG WINTER SEASON FOR THE TOURISM INDUSTRY

7%

OF HOLIDAY VISITORS SKIED IN
THE LAST THREE YEARS OR

110K

AVERAGE NUMBER PER YEAR

SKI IS DEFINED AS ANY OF THE BELOW:

SKIING
SNOWBOARDING
SNOW SPORTS

SKI VISITORS PROVIDE A TOURISM BOOST IN WINTER, PARTICULARLY TO THE SOUTH ISLAND



30%

OF ALL HOLIDAY
VISITORS
IN WINTER
CLAIM TO SKI
AND

64%

OF WINTER
VISITORS WHO
ARRIVE IN THE
SOUTH ISLAND
CLAIMED TO SKI



LENGTH OF STAY

18

NIGHTS

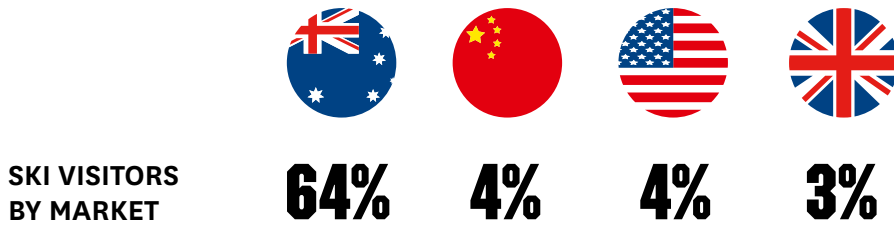
VS. 16 NIGHTS ALL HOLIDAY VISITORS

SKI



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AUSTRALIA IS THE LARGEST SINGLE MARKET FOR SKIING



SKI VISITORS
BY MARKET

SKIERS THAT VISIT ARE LIKELY TO RETURN TO NEW ZEALAND



52%
SKIERS ON A
REPEAT VISIT



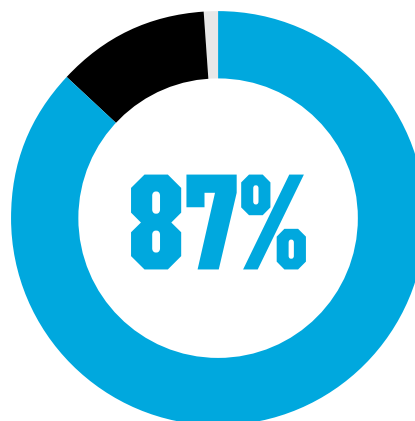
AUSTRALIAN SKIERS
ON A REPEAT VISIT

SKIERS HAVE AN EXCELLENT VISITOR EXPERIENCE WITH STRONG SATISFACTION AND ARE VERY LIKELY TO RECOMMEND NEW ZEALAND AS A DESTINATION

SATISFACTION OF
NEW ZEALAND EXPERIENCE



NET PROMOTER SCORE



Promoters (9-10) Passives (7-8) Detractors (1-6)

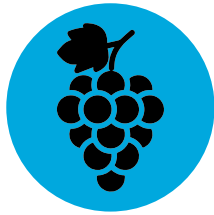
WINE & FOOD



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WINE AND FOOD EXPERIENCES ADD DEPTH AND RICHNESS TO A NEW ZEALAND HOLIDAY AND ARE ENJOYED BY MOST VISITORS. THOSE WHO VISIT VINEYARDS TYPICALLY BEING HIGHER VALUE.

NEARLY A QUARTER OF HOLIDAY VISITORS EXPERIENCE NEW ZEALAND WINE BY VISITING A VINEYARD OR WINERY



25%

OF HOLIDAY VISITORS VISITED A VINEYARD OR WINERY IN THE LAST THREE YEARS OR

372K

AVERAGE NUMBER PER YEAR



11%

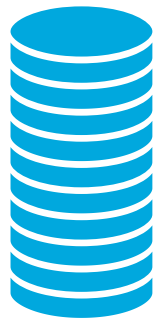
OF HOLIDAY VISITORS ATTENDED A FOOD OR WINE EVENT IN THE LAST THREE YEARS OR

171K

AVERAGE NUMBER PER YEAR

HOLIDAY VISITORS WHO VISITED A VINEYARD OR ATTENDED A FOOD OR WINE EVENT SPEND MORE AND STAY LONGER

AVG SPEND



\$4,900

VS. \$3,900 ALL HOLIDAY VISITORS

LENGTH OF STAY

23

NIGHTS

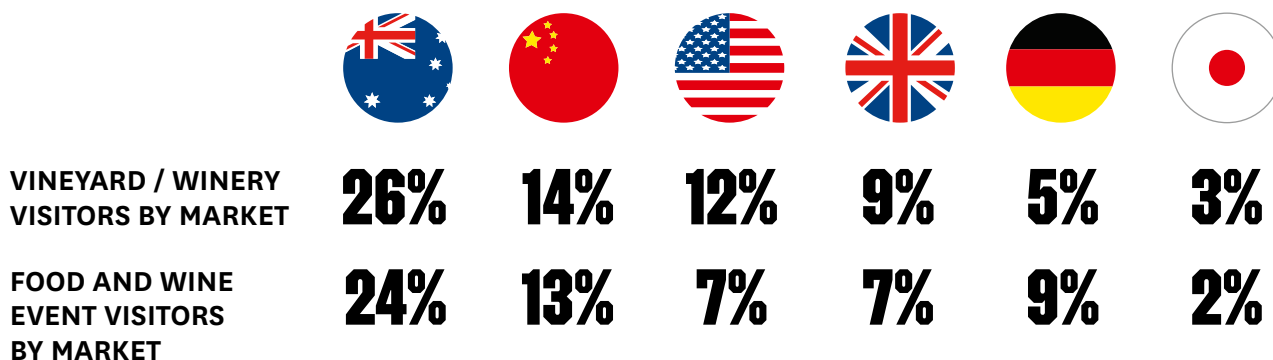
VS. 16 NIGHTS ALL HOLIDAY VISITORS

WINE & FOOD



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A QUARTER OF VISITORS TO VINEYARDS AND WINERIES
OR FOOD AND WINE EVENTS ARE AUSTRALIAN



WINE AND FOOD VISITORS HAVE AN EXCELLENT VISITOR EXPERIENCE WITH STRONG SATISFACTION AND ARE VERY LIKELY TO RECOMMEND NEW ZEALAND AS DESTINATION

SATISFACTION OF
NEW ZEALAND EXPERIENCE



NET PROMOTER SCORE

