

THE OPPORTUNITY TO DEVELOP AND PROMOTE A DIVERSE RANGE OF WALKING EXPERIENCES



Walking is one of the most popular activities for both New Zealanders and international visitors. Walking is considered a great way to see New Zealand's landscapes - the key motivation for overseas visitors choosing New Zealand, and over half of our international visitors use our National Parks when they visit.

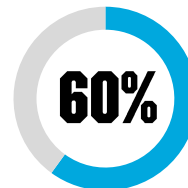
NEW ZEALAND OFFERS A RANGE OF WALKING EXPERIENCES WITH 73% OF OUR OVERSEAS VISITORS PARTICIPATING IN WALKING ACTIVITIES

73% Of holiday visitors participated in walking/hiking in the last three years or...

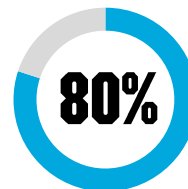
1.1M AVERAGE NUMBER PER YEAR



14% Cite walking and hiking is a factor influencing consideration of New Zealand

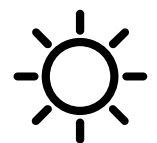
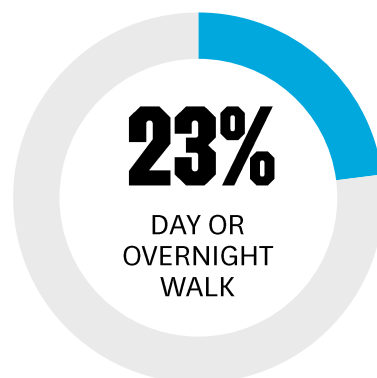
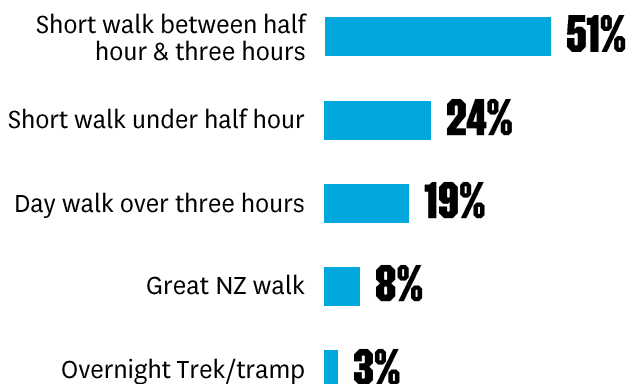


New Zealanders participate in walking*



New Zealanders visit our conservation lands and waters**

SHORTER WALKS (UNDER 3 HOURS) ARE THE MOST POPULAR WALKING EXPERIENCE

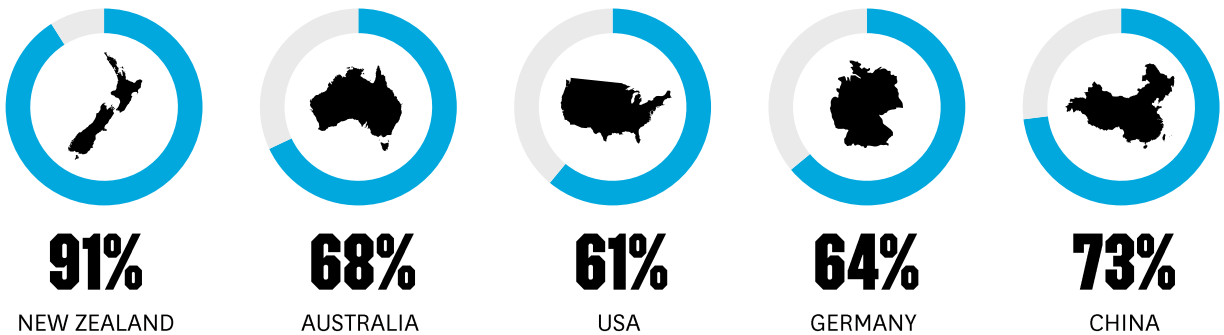


Source: IVS 3 years to March 2017 | *Source: Sport New Zealand 2013/14 Active New Zealand Survey | **Source: DOC Survey of New Zealanders 2016

NEW ZEALAND IS CLEARLY SEEN AS A PLACE THAT OFFERS GREAT WALKING EXPERIENCES

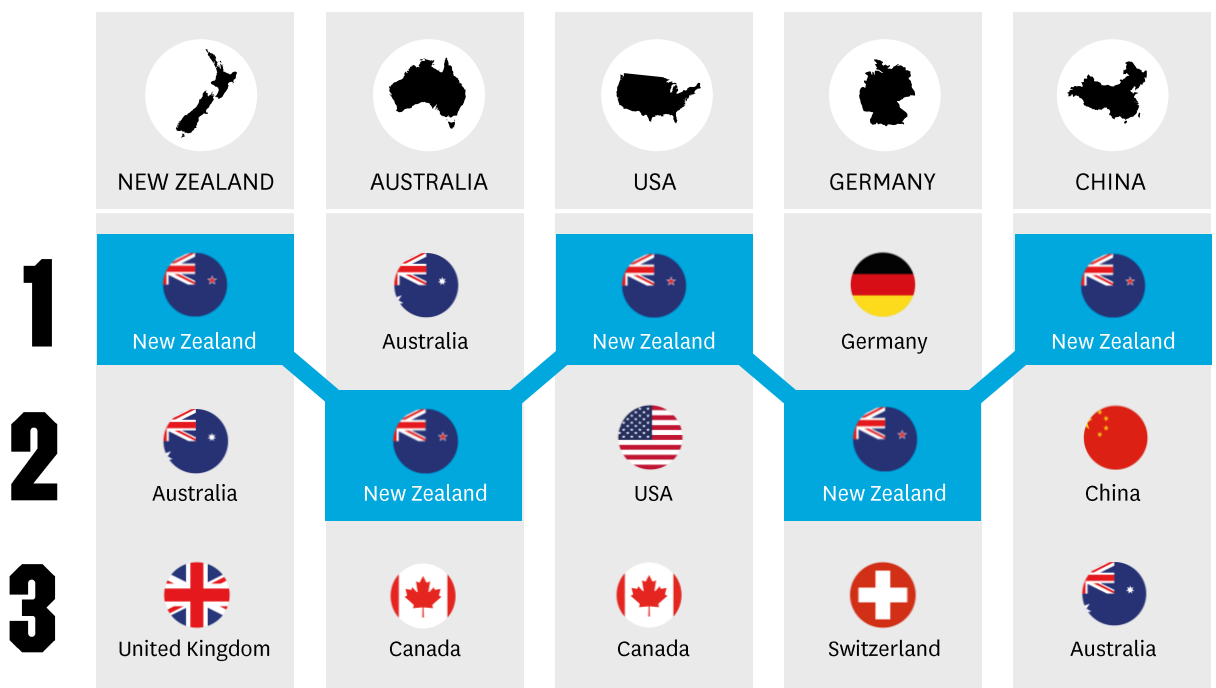
Recent research undertaken by Tourism New Zealand and the Department of Conservation, highlighted the significant opportunity for developing new walking experiences that meet the needs of both New Zealanders and international visitors. Research indicates that New Zealand is clearly associated as a place offering great walking experiences.

(% Target audience)



TOP 3 COUNTRIES ASSOCIATED WITH OFFERING A GREAT WALKING EXPERIENCE

New Zealand ranks number one or two as a destination with great walking experiences among our international target audience, and tops the list among our domestic audience.

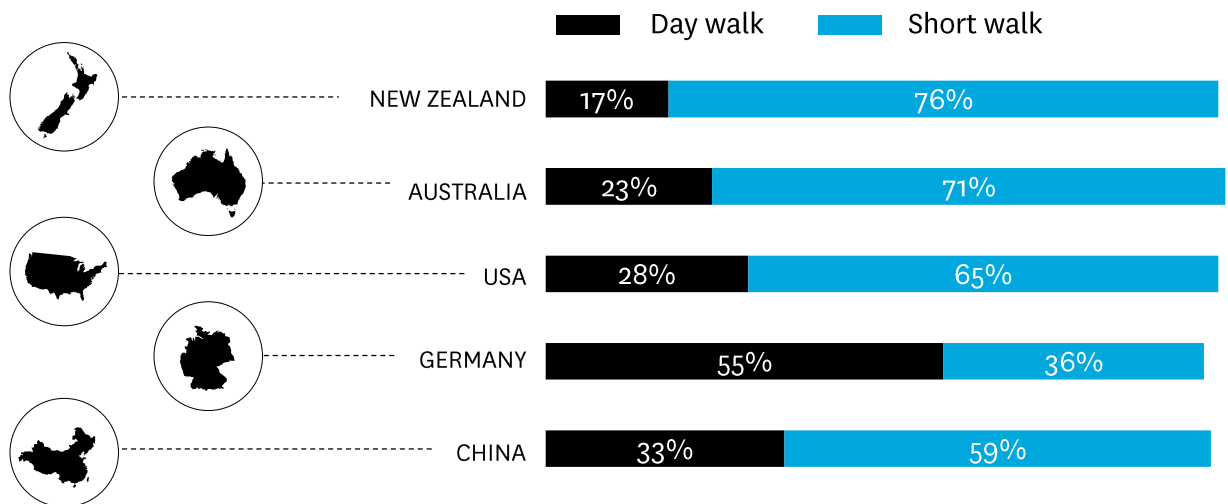


Source: Kantar TNS research, July 2017

SHORTER WALKS PRESENT A SIGNIFICANT OPPORTUNITY FOR A GREAT WALKING EXPERIENCE

Research indicates that all markets, with the exception of Germany, prefer to participate in our shorter walking experiences (30 minutes to 3 hours). Potential visitors from Germany see our day walks (4-9 hours) as more attractive. This indicates a significant opportunity to develop and promote a broad range of short and day walking experiences to meet the needs of our consumers, whether they be locals, or international visitors.

PREFERRED WALK TO DO (% Target audience)



LEVEL OF DIFFICULTY, AND OUR LANDSCAPES AND SCENERY ARE THE KEY DRIVERS THAT INFLUENCE THE CHOICE OF WALK

Understanding what motivates our walkers when choosing a particular track, ensures that we are able to meet our visitors' needs, and ensures a great experience.



Source: Kantar TNS research, July 2017