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 is considering coming to New Zealand for their next holiday, and New Zealand is one of their top five destinations they would most like to visit. Tourism New Zealand commission ongoing research to understand who these people are, and what their motivations and barriers are; this research is the key information source for understanding our future visitors.
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CHINA CONSUMER PROFILE

GET TO KNOW OUR ACTIVE CONSIDERERS

Active Considerers are what we call our target audience. These people are aged 18-74, they are aware of New Zealand and it is a preferred destination to visit for a holiday in the next three years. They also indicate that they are prepared to spend ¥10,000 per person on their holiday.

GENDER SKEWS FEMALE RELATIVE TO POPULATION

ACTIVE CONSIDERERS ARE MORE LIKELY TO BE TERTIARY QUALIFIED

COLLEGE GRADUATE WITH A 4 YEAR DEGREE

73%

57%

ACTIVE CONSIDERERS HAVE HIGHER HOUSEHOLD INCOME

> ¥180K YUAN

AC 79%

NON-AC 50%

¥60K - ¥144K YUAN

AC 20%

NON-AC 47%

< ¥60K YUAN

AC 1%

NON-AC 7%

ACTIVE CONSIDERERS LIVE IN THE FOLLOWING REGIONS

BEIJING & SHENYANG 24%

GUANGZHOU & SHENZHEN 20%

CHANGSHA, CHENGDU, XIAN & WUHAN 21%

SHANGHAI, NANJING & HANGZHOU 35%
Active Considerers from China are here to get in touch with nature and broaden their minds. To help our visitors achieve this, we need to communicate how easy it is to travel around New Zealand.

**WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?**

- **70%** to get in touch with nature
- **59%** to broaden my mind
- **54%** to indulge & pamper myself
- **53%** to feel relaxed
- **53%** to have fun & enjoy myself

**WHAT DO THEY NEED MORE INFORMATION ABOUT?**

- **27%** how easy it is to travel around
- **20%** the length of time I need to experience NZ properly
- **17%** what/where the recommended things to see and do are
- **24%** how long it takes to travel between the main attractions

**HOW TO INTERPRET THIS DATA:**
27% of active considerers said they wanted to know more about how easy it is to travel around New Zealand.
WHAT CHINESE ACTIVE CONSIDERERS KNOW US FOR

- Clean & Unpolluted
- Landscapes & Scenery
- Range of Adventure
- Seeing Lots Without Travelling Far

MESSAGES WE NEED TO COMMUNICATE MORE

- Range of Experiences
- Easy to Travel Around
- Friendly People
- Unique Experiences

HOW DOES NEW ZEALAND COMPARE TO OTHER COUNTRIES?
For Chinese Active Considerers, New Zealand is in the competitive set including destinations such as Australia, Hawaii, France and Bali. Our strengths are our clean and unpolluted environment as well as our landscapes and scenery.
CHINESE INDEPENDENT PROFESSIONALS

WHO ARE THEY?

Independent Professionals (IPs) are people aged 25-54 years old. They are our largest segment within our Active Considerer target audience, making up 89% of our target audience.

WHAT DO INDEPENDENT PROFESSIONALS WANT FROM A HOLIDAY IN NEW ZEALAND?

70% TO GET IN TOUCH WITH NATURE
57% TO BROADEN MY MIND
53% TO HAVE FUN & ENJOY MYSELF
53% TO INDULGE & PAMPER MYSELF
53% TO FEEL RELAXED

WHO ARE THEY?

70% TO GET IN TOUCH WITH NATURE
57% TO BROADEN MY MIND
53% TO HAVE FUN & ENJOY MYSELF
53% TO INDULGE & PAMPER MYSELF
53% TO FEEL RELAXED

WHAT DO INDEPENDENT PROFESSIONALS WANT FROM A HOLIDAY IN NEW ZEALAND?

GENDER SKEWS FEMALE RELATIVE TO POPULATION

FEMALE 52%
MALE 48%

THEY ARE MORE LIKELY TO BE TERTIARY QUALIFIED

COLLEGE GRADUATE WITH 4 YEAR DEGREE

59%

75%

MORE LIKELY TO HAVE HIGHER HOUSEHOLD INCOME

> ¥180K YUAN
AC 69%
NON-AC 36%

¥95K - ¥180K YUAN
AC 29%
NON-AC 47%

< ¥94K YUAN
AC 3%
NON-AC 18%

WHAT DOES THEIR HOLIDAY LOOK LIKE?

ORGANISED COACH 59%
SELF DRIVE EXPLORING 26%
STAYING LESS THAN 10 DAYS
STAYING FOR 1-3 WEEKS
TRAVELLING WITH PARTNER OR SPOUSE

WHAT DO THEY NEED MORE INFORMATION ABOUT?

HOW EASY IT IS TO TRAVEL AROUND 27%
HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS 23%
THE LENGTH OF TIME NEEDED TO EXPLORE NZ PROPERLY 19%
WHAT THE RECOMMENDED THINGS ARE TO SEE AND DO 17%
Our market infographics are drawn from two different sources.

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HISTORIC VIEW
TOTAL ARRIVALS
YE SEPTEMBER 2017

- AUS 1,467K (40%)
- CHINA 408K (11%)
- USA 320K (9%)
- UK 246K (7%)
- JAPAN 102K (3%)
- GERMANY 104K (3%)
- REST OF WORLD 28%
CHINA MARKET SNAPSHOT

CHINA IS OUR SECOND LARGEST VISITOR MARKET. IT IS IN A TRANSITION PERIOD INTO MORE FREE INDEPENDENT TRAVELLERS (FIT) AND AWAY FROM TRADITIONAL GROUP TOURS

PURPOSE OF VISIT

- VISITING FRIENDS / RELATIVES: 51K
- BUSINESS: 17K
- EDUCATION: 10K
- CONFERENCES: 3K
- OTHER: 23K

TOTAL: 407K

AVERAGE LENGTH OF STAY

- HOLIDAY: 303K
- HOLIDAY STAY DAYS: 2.7M
- TOTAL STAY DAYS: 7.4M
- HOLIDAYS: 9 DAYS
- ALL VISITORS: 18 DAYS

HOLIDAY VISITORS

- REPEAT VISITORS: 9%
- FIRST TIME VISITORS: 91%

AVERAGE SPEND

- HOLIDAY: $4,091
- TOTAL: $4,068

TOTAL SPEND

- HOLIDAY: $1.160B
- TOTAL: $1.503B

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
AFTER A SUSTAINED PERIOD OF STRONG GROWTH 2016/17 SAW A MODERATION IN GROWTH RATES. HOWEVER LONG TERM GROWTH FORECAST FOR CHINA REMAIN STRONG.

CHINA ARRIVALS FORECAST TO GROWTH 12.1% P.A. FROM 2017 TO 2023 TO 913K

CHINESE HOLIDAY VISITORS ARE INCREASINGLY CHOOSING TO TRAVEL AS FIT RATHER THAN GROUP
CHINA
MARKET SNAPSHOT

OVER HALF OF OUR CHINESE HOLIDAY VISITORS ARE INDEPENDENT PROFESSIONALS.

AGE PROFILE HOLIDAY VISITORS

4%  BACKPACKERS  18-24
55%  INDEPENDENT PROFESSIONALS  25-54
31%  ACTIVE BOOMERS  55-74
CHINA MARKET SNAPSHOT

WITH DIRECT FLIGHTS FROM MORE CHINESE CITIES FEWER VISITORS ARE COMING TO NEW ZEALAND VIA AUSTRALIA.

43% ARRIVE VIA AN AUSTRALIAN AIRPORT
41% COME DIRECT FROM A CHINA
12% COME VIA HONG KONG
2% COME VIA SINGAPORE

BEIJING 5%
SHANGHAI 16%
GUANGZHOU 14%
SHENZHEN 3%
CHONGQING 2%
CHENGDU 1%

PROVINCE OF RESIDENCE

GUANGDONG 15%
BEIJING 14%
SHANGHAI 16%
Others 41%
Summer is a popular time to visit as it coincides with Chinese New Year.

Key travel period of Chinese New Year occurs during our summer peak.

- Arrive in Summer: 31%
- Arrive in Autumn: 29%
- Arrive in Winter: 17%
- Arrive in Spring: 23%
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: 47%
- Geothermal Park: 60%
- Scenic Tour Bus or Train: 52%
- Beach: 65%
- National Parks: 60%
- Farm / Orchard: 65%
- Walk / Hike / Tramp: 72%
- Observing Wildlife: 81%
- Scenic Boat Trip: 49%
- Museum / Art Gallery: 45%
- WALK / HIKE / TRAMP 72%
- OBSERVING WILDLIFE 81%
- SCENIC BOAT TRIP 49%
- GEOTHERMAL PARK 60%
- MAORI CULTURAL EXPERIENCE / ACTIVITY 71%
- NATIONAL PARKS 60%
- MUSEUM / ART GALLERY 45%
- BEACH 65%
- FARM / ORCHARD 65%
- SCENIC TOUR BUS OR TRAIN 52%
- HOT POOLS 47%
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></th>
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<tbody>
<tr>
<td>HOTEL</td>
<td>69%</td>
</tr>
<tr>
<td>MOTEL / MOTOR INN / SERVICED APPT</td>
<td>35%</td>
</tr>
<tr>
<td>BED AND BREAKFAST</td>
<td>24%</td>
</tr>
<tr>
<td>FAMILY AND FRIENDS</td>
<td>24%</td>
</tr>
<tr>
<td>LUXURY</td>
<td>11%</td>
</tr>
<tr>
<td>BACKPACKER / HOSTEL</td>
<td>7%</td>
</tr>
<tr>
<td>CAMPING</td>
<td>4%</td>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>TRANSPORT USED</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>TOUR BUS</td>
<td>61%</td>
</tr>
<tr>
<td>PLANE</td>
<td>42%</td>
</tr>
<tr>
<td>RENTAL CAR</td>
<td>33%</td>
</tr>
<tr>
<td>TAXI / SHUTTLE</td>
<td>29%</td>
</tr>
<tr>
<td>BUS SERVICE</td>
<td>11%</td>
</tr>
<tr>
<td>FERRY OR BOAT SERVICE</td>
<td>9%</td>
</tr>
<tr>
<td>PRIVATE CAR</td>
<td>9%</td>
</tr>
<tr>
<td>TRAIN</td>
<td>7%</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.

8.9/10

Expectations of New Zealand experience met or exceeded

- 25% Exceeded
- 61% Met
- 14% Unmet

Overall, Chinese visitors are largely happy with their New Zealand experience. However there is a portion whose expectations are not met.

CHINESE MARKET SNAPSHOT

73% LIKELY TO RECOMMEND NEW ZEALAND AS A DESTINATION

NET PROMOTER SCORE

4% DETRACTORS

69%

73% PROMOTERS

22% PASSIVE