UNITED STATES OF AMERICA

Market information about our Visitors and our Active Considerers
Past Visitor Research
This is information collected about those who have visited New Zealand. This is the source for the visitor 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).

Throughout this document, any pages that refer to past visitor research will have a black background like this one.

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 commissions ongoing research (Kantar TNS), 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.

Throughout this document, any pages that refer to Active Considerer research will have a white background like this one.
The USA has experienced rapid growth in recent years, buoyed by big increases in air capacity.

**Purpose of Visit**
- Holiday: 207k
- Total: 320k

**Average Length of Stay**
- Holiday: 207k
- Total: 320k

**Average Spend per Visitor**
- Holiday: $3,942
- Total: $3,977

**Total Market Contribution Spend**
- Holiday: $790m
- Total: $1.162b

**Visitor Growth Trend**
Increases in air capacity have boosted visitor arrivals to over 300k.

**Sources:** Statistics New Zealand International Travel and Migration; MBIE International Visitor Forecasts; MBIE International Visitor Survey; MBIE Regional Tourism Estimates
USA

VISITOR PROFILE

Independent Professionals are the largest segment with the majority at the younger end of the 25-54 age group.

AGE PROFILE OF HOLIDAY VISITORS

- **9%**
  - **YOUTH**
  - Ages 18-24

- **43%**
  - **INDEPENDENT PROFESSIONALS**
  - Ages 25-54

- **37%**
  - **ACTIVE BOOMERS**
  - Ages 55-74

VISITOR ROUTES

With more direct air capacity, more USA visitors are arriving direct from USA rather than via Australia.

STATE OF RESIDENCE

- **24%**
  - **CALIFORNIA**

ARRIVE VIA AN AUSTRALIAN AIRPORT

- **38%**

COME DIRECT FROM USA

- **47%**

NUMBER OF VISITORS

- **5,000**
- **4,000**
- **3,000**
- **2,000**
- **1,000**
- **0**

AGE

- **10**
- **20**
- **30**
- **40**
- **50**
- **60**
- **70**
- **80**

USA | PAST VISITORS
USA VISITOR TRAVEL SEASONS

Summer is the biggest period for arrivals with some USA carriers not currently flying for the full shoulder seasons.

NEARLY HALF OF USA HOLIDAY VISITORS ARRIVE IN THE SHOULDER SEASONS

ARRIVE IN SUMMER 41%
ARRIVE IN AUTUMN 25%
ARRIVE IN WINTER 11%
ARRIVE IN SPRING 23%

USA VISITOR DESTINATIONS

USA visitors tend to visit three to four regions on average.
Top activities for USA holiday visitors.

USA HOLIDAY VISITORS VISIT ON AVERAGE TWO NATIONAL PARKS

37% Fiordland
23% Mt Aspiring
19% Aoraki / Mt Cook

USA holiday visitors stay in a variety of accommodation types and self drive transport options are widely used.

ACCOMMODATION STAYED IN

- Hotel: 60%
- Motel / Motor Inn / Serviced App: 28%
- Bed and Breakfast: 18%
- Luxury: 16%
- Backpacker / Hostel: 15%
- Family and Friends: 12%
- Camping: 10%

TRANSPORT USED

- Rental Car: 56%
- Taxi/Shuttle: 50%
- Tour Bus: 42%
- Plane: 37%
- Ferry or Boat Service: 36%
- Campervan: 36%
- Bus Service: 18%
- Cook Strait Ferry: 17%
- Train: 11%
- Helicopter: 7%
- Private Car: 6%
USA VISITOR SATISFACTION

USA visitors are highly satisfied with their time in New Zealand and many are likely to recommend New Zealand as a destination.

SATISFACTION

9.5/10

MEETING EXPECTATIONS

95% Expectations of New Zealand experience met or exceeded

61% Exceeded
34% Met
3% Worse than
2% Not sure

USA visitors have the highest satisfaction score of their New Zealand experience of all our key markets.

NET PROMOTER SCORE

85% PROMOTERS

88%

9% PASSIVES

3% DETRACTORS

UNITED STATES OF AMERICA

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 USD$1,300 per person on their holiday.
**Active Considerer Profile**

**American Active Considerers = 27.9m**

**Active Considerers from the USA 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.**

**Most Active Considerers are Independent Professionals**

- Independent Professionals: 69%
- Active Boomers: 22%

**Gender Skews Male**

- Male: 54%
- Female: 46%

**Active Considerers are Slightly More Likely to Be Tertiary Qualified**

- 4 Year University Degree or Higher: 30%
- 3 Year Degree: 32%

**Active Considerers Have Higher Household Income**

- > $125K USD: 14%
- $60K-$125K USD: 38%
- $35K-$59K USD: 23%
- < $35K USD: 28%

**Active Considerers Live in the Following Regions**

- West: 26%
- Midwest: 19%
- Northeast: 17%
- South: 38%

**What do Active Considerers Want from a Holiday in New Zealand?**

- To get in touch with nature: 70%
- To broaden my mind: 59%
- Indulge & pamper myself: 54%
- To feel relaxed: 53%
- To have fun & enjoy myself: 53%

**What do they need more information about?**

- How easy it is to travel around: 34%
- The local are to welcome tourists from my country: 30%
- The length of time I need to experience New Zealand properly: 29%
- How long it takes to travel between the main attractions: 27%
- What/where the recommended things to do and see are: 24%

**How to Interpret this Data**

34% of Active Considerers said they wanted to know more about how easy it is to travel around New Zealand.
USA

ACTIVE CONSIDERER PROFILE

For American Active Considerers, New Zealand is in the competitive set including destinations such as Australia, Italy, the Caribbean, Ireland and the UK. Our strengths are our landscape and scenery as well as our clean and unpolluted environment.

WHAT AMERICANS KNOW US FOR

- Clean & unpolluted
- Range of adventure
- Safe destination
- Landscapes & scenery

MESSAGES WE NEED TO COMMUNICATE MORE

- Seeing lots without travelling far
- Easy to travel around
- Friendly people
- Unique experiences
**ACTIVE CONSIDERER INDEPENDENT PROFESSIONAL PROFILE**

Independent Professionals are people aged 25-54 years old. They are the largest segment within our Active Considerer target audience, making up 69% of our target audience.

**GENDER SKEWS MALE**

- 55%
- 45%

**INDEPENDENT PROFESSIONALS ARE SLIGHTLY MORE LIKELY TO BE TERTIARY QUALIFIED**

- 34%
- 36%

**INDEPENDENT PROFESSIONALS ARE MORE LIKELY TO HAVE HIGHER HOUSEHOLD INCOME**

<table>
<thead>
<tr>
<th>Household Income</th>
<th>AC</th>
<th>NON-AC</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt; $125K USD</td>
<td>13%</td>
<td>9%</td>
</tr>
<tr>
<td>$60K - $125K USD</td>
<td>41%</td>
<td>33%</td>
</tr>
<tr>
<td>$35K - $59K USD</td>
<td>26%</td>
<td>24%</td>
</tr>
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**WHAT DO INDEPENDENT PROFESSIONALS WANT FROM A HOLIDAY IN NEW ZEALAND?**

- 71% TO LEARN MORE & EXPLORE NEW THINGS
- 57% TO FEEL A SENSE OF ADVENTURE
- 54% TO BROADEN MY MIND
- 53% TO TAKE A BREAK FROM THE ROUTINE OF EVERYDAY LIFE
- 50% INTERACT WITH PEOPLE OF A DIFFERENT CULTURE

**WHAT DOES THEIR HOLIDAY LOOK LIKE?**

- 66% SELF DRIVE EXPLORING
- 34% STAYING FOR 1-2 WEEKS
- 26% TRAVELLING WITH PARTNER OR SPOUSE
- 13% TRAVELLING WITH FRIENDS
- 17% EXPERIENCE SEEKING
- 83% STAYING FOR 11 DAYS

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

- 31% HOW SAFE IT IS FROM CRIME
- 42% HOW EASY IT IS TO TRAVEL AROUND
- 29% HOW WELCOMING THE LOCALS ARE TO TOURISTS FROM MY COUNTRY
- 32% THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND
ACTIVE CONSIDERER ACTIVE BOOMER PROFILE

Active Boomers are people aged 55-74 years old. They are our second largest segment within our Active Considerer target audience, making up 22% of our target audience.

WHAT DO ACTIVE BOOMERS WANT FROM A HOLIDAY IN NEW ZEALAND?

- 80% TO LEARN MORE & EXPLORE NEW THINGS
- 78% TO HAVE FUN & ENJOY MYSELF
- 63% INTERACT WITH PEOPLE OF A DIFFERENT CULTURE OR LIFESTYLE
- 59% TO BROADEN MY MIND
- 47% TO FEEL RELAXED

WHAT DOES THEIR HOLIDAY LOOK LIKE?

- 44% SELF DRIVE EXPLORING
- 20% TRAVELLING FROM A BASE
- 20% STAYING FOR 1-2 WEEKS
- 20% STAYING FOR LESS THAN 1 WEEK
- 20% TRAVELLING WITH PARTNER OR SPOUSE

WHAT DO THEY NEED MORE INFORMATION ABOUT?

- 28% THE LENGTH OF TIME NEEDED TO EXPERIENCE NEW ZEALAND PROPERLY
- 43% HOW EASY IT IS TO TRAVEL AROUND
- 50% THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND
- 35% HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS
- 33% HOW WELCOMING THE LOCALS ARE TO TOURISTS FROM MY COUNTRY

ACTIVE BOOMERS ARE MORE LIKELY TO HAVE HIGHER HOUSEHOLD INCOME

<table>
<thead>
<tr>
<th>Income Range</th>
<th>Active Boomers (AC)</th>
<th>Non-Active Boomers (NON-AC)</th>
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<tbody>
<tr>
<td>&gt; $125K USD</td>
<td>15%</td>
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GENDER SKEWS MALE

- 54% Males
- 46% Females

ACTIVE BOOMERS ARE SLIGHTLY MORE LIKELY TO BE TERTIARY QUALIFIED

- 36% Tertiary Qualified
- 32% High School
- 24% Post High School