SPECIAL INTEREST

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.
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 of holiday visitors per year

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.

**Walking and hiking**

- Average spend difference: **$4,100** vs. **$3,900** all holiday visitors
- Length of stay: **19** nights vs. **16** nights all holiday visitors

**Day or overnight walkers**

- Average 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**

- Regions visited overnight: 5 - 6
- National parks visited: 3

With a range of walking options, most international visitors participate in short walks of up to three hours.

- Short walk between half hour and three hours: **51%**
- Short walk under half hour: **24%**
- Day walk over three hours: **19%**
- Great NZ walk: **8%**
- Overnight trek/tramp: **3%**

Day or multi-day walkers spend more and stay nearly twice as long as the average holiday visitor.
WALKING IS A POPULAR ACTIVITY ACROSS ALL MAJOR MARKETS. LONGER WALKS ARE PARTICULARLY POPULAR AMONG GERMAN AND UK VISITORS.

ANY WALK VISITORS BY MARKET

<table>
<thead>
<tr>
<th>Country</th>
<th>Australia</th>
<th>China</th>
<th>USA</th>
<th>UK</th>
<th>Germany</th>
<th>Japan</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY WALK</td>
<td>29%</td>
<td>15%</td>
<td>11%</td>
<td>7%</td>
<td>6%</td>
<td>3%</td>
</tr>
<tr>
<td>SHORT WALKS</td>
<td>59%</td>
<td>52%</td>
<td>67%</td>
<td>71%</td>
<td>73%</td>
<td>43%</td>
</tr>
<tr>
<td>DAY OR OVERNIGHT WALKS</td>
<td>17%</td>
<td>14%</td>
<td>27%</td>
<td>34%</td>
<td>58%</td>
<td>18%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th></th>
<th>Promoters (9-10)</th>
<th>Passives (7-8)</th>
<th>Detractors (1-6)</th>
</tr>
</thead>
<tbody>
<tr>
<td>ALL WALKING AND HIKING</td>
<td>79%</td>
<td></td>
<td></td>
</tr>
<tr>
<td>DAY AND OVERNIGHT WALKS</td>
<td>83%</td>
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</table>
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 more.

138k average number of holiday visitors per year.

Cycle touring, mountain biking, and other cycling are included in this category.

Visitors who participate in cycling spend more and stay longer.

Average spend difference: $4,900 vs. $3,900 all holiday visitors.

Length of stay: 33 nights vs. 16 nights all holiday visitors.

Australia is the largest single market for cycling.

Cycling visitors go to more regions and are more likely to visit vineyards and wineries.

Regions visited overnight: 5 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: 9.1/10.

Net promoter score: 82%.

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

Australia 28%, China 12%, USA 10%, UK 10%, Germany 8%, Japan 3%. 
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. New Zealand has a range of world class marquee golf courses and experience courses.

2% of holiday visitors golfed in the last three years or

35k average number of holiday visitors per year

14 marquee courses

32,000 rounds played by international visitors at marquee courses in 2016 +17% vs. 2015

Golfers spend more and stay longer than average holiday visitors.

Average spend difference

$4,800 vs. $3,900 all holiday visitors

Average spend of a golf visitor from the US approximately*

$19,000 vs. $9,900 all holiday visitors

Length of stay

27 nights vs. 16 nights all holiday visitors

Most golfers are Australian visitors

Golf visitors by market

Australia 46%
China 11%
UK 7%
USA 6%
Germany 5%
Japan 3%

Holiday visitors who participate in golf have a strong propensity to visit vineyard and wineries

Holiday visitors who played golf are very likely to recommend New Zealand

Otago
Waikato
Northland
Nelson
Hawke’s Bay

41% vs. 25% of all holiday visitors

Holiday visitors who played golf have a strong propensity to visit the below regions

Visits vineyards

9.3/10

Satisfaction of New Zealand experience

85%

Net promoter score

PROMOTERS (9-10)
PASSIVES (7-8)
DETRACTORS (1-6)
SKI

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 of Visitors Per Year

SKI IS DEFINED AS ANY OF THE BELOW:

1. SKIING
2. SNOWBOARDING
3. 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

64% of Winter Visitors Who Arrive in the South Island Claimed to Ski

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

AUSTRALIA IS THE LARGEST SINGLE MARKET FOR SKIERS

<table>
<thead>
<tr>
<th>Country</th>
<th>Ski Visitors by Market</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>64%</td>
</tr>
<tr>
<td>China</td>
<td>4%</td>
</tr>
<tr>
<td>USA</td>
<td>4%</td>
</tr>
<tr>
<td>UK</td>
<td>3%</td>
</tr>
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</table>

SKIER VISITORS

18 NIGHTS VS. 16 NIGHTS ALL HOLIDAY VISITORS

SKIERS THAT VISIT ARE LIKELY TO RETURN TO NEW ZEALAND

52% Skiers on a Repeat Visit

AUSTRIAN SKIERS ON A REPEAT VISIT

59%

MARKET SATISFACTION OF NEW ZEALAND EXPERIENCE

9.1/10

NET PROMOTER SCORE

87%

PROMOTERS (9-10)

PASSIVES (7-8)

DETRACTORS (1-6)
WINE & FOOD

Wine and food experiences add depth and richness to a New Zealand holiday and are enjoyed by most visitors. Those who visit vineyards typically spend more.

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 OF HOLIDAY VISITORS PER YEAR

11% OF HOLIDAY VISITORS ATTENDED A FOOD OR WINE EVENT IN THE LAST THREE YEARS OR

171K AVERAGE NUMBER OF HOLIDAY VISITORS PER YEAR

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

AVERAGE SPEND DIFFERENCE

$4,900 VS. $3,900 ALL HOLIDAY VISITORS

LENGTH OF STAY

23 NIGHTS VS. 16 NIGHTS ALL HOLIDAY VISITORS

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 A DESTINATION

SATISFACTION OF NEW ZEALAND EXPERIENCE

9.1/10

NET PROMOTER SCORE

79%