

Motu Trails, Bay of Plenty



**100% PURE
NEW ZEALAND**

newzealand.com

VISITOR PROFILES

May 2019



Waitangi, Northland

Kia ora,

Welcome to the first edition of Tourism New Zealand's Visitor Profiles.

We've brought tourism data and insights about our visitors together like never before to provide a comprehensive overview of high-value visitors from our six key markets.

Visitor Profiles are one of the practical ways Tourism New Zealand is helping the tourism sector create and maintain sustainable businesses.

We know a lot about our international visitors, and we are pleased to share these insights with you in a unique, personalised way to help you grow and guide your business.

The information included in this book is designed to help guide your business decisions, giving you information about our visitors including their preferences, behaviours, expectations of a New Zealand holiday, and what motivates them to come here.

This information can help guide the design of a new product or service, or help refine existing tourism experiences to ensure they're delivering the best experience to our visitors.

Enjoy getting to know Lauren, Xiao, Melissa, James, Stefan and Takuya – our first Tourism New Zealand Visitor Profiles – and learning more about how your business can cater to their individual needs and preferences.

For more information on our international visitors, visit www.tourismnewzealand.com/research

Ngā mihi,



Stephen England-Hall
Chief Executive
Tourism New Zealand
Manaakitanga Aotearoa

Try our Visitor Profile Tool to find out which high-value visitors from our six key visitor markets are the best match for your product.



Visit www.tourismnewzealand.com/visitorprofiletool to find out more.

INTRODUCTION

HOW TO USE THIS BOOKLET

With around 100 million people actively thinking about a New Zealand holiday, Tourism New Zealand takes a strategic approach to our activity to ensure we're targeting high-value visitors. We focus our activity on attracting visitors from 15 countries who are likely to stay longer, visit outside of peak season, spend more and visit more regions. This aims to spread the benefits of international tourism across the country and throughout the year.

To better understand our visitor markets and guide our work, Tourism New Zealand conducts regular consumer research and uses this alongside official and partner data.

Sources include data on past visitors collated by the Ministry of Business, Innovation and Employment (International Visitor Survey), as well as information on our target markets which we call 'Active Considerers'. This book also includes information from Auckland International Airport.

Almost half of all holiday visitors to New Zealand are Independent Professionals (IP), which is considered a high-value segmentation by Tourism New Zealand. The six profiles included in this book are examples of independent professionals from our six key markets: Australia, China, USA, UK, Germany and Japan.

Independent professionals (25-54 years old)

- Travel as a couple taking a break from busy lives
- Motel/hotel accommodation
- Rental cars
- Travel for adventure, relaxation and luxury

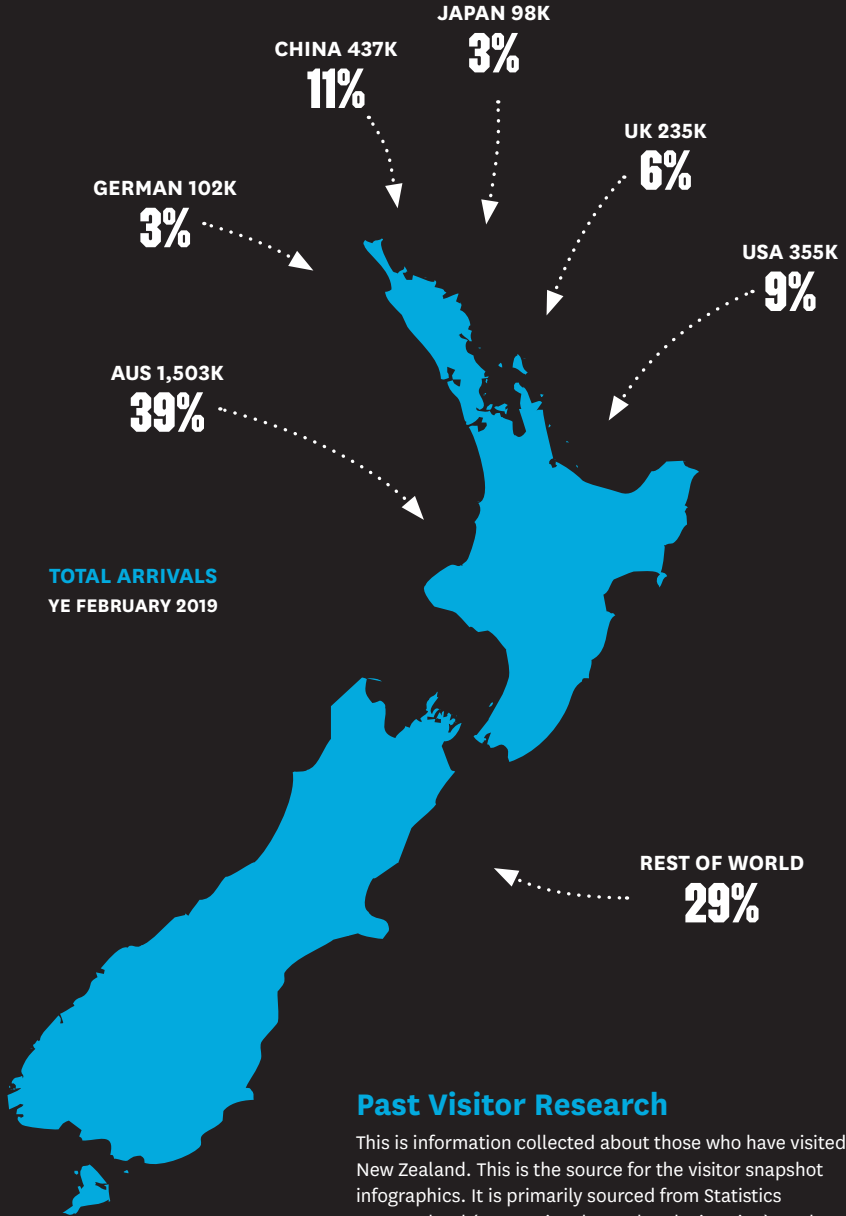
The information included in this book is designed to help guide your business decisions, giving you information about our visitors including their preferences, behaviours, expectations of a New Zealand holiday, and what motivates them to come here.

The profiles are separated with tabs for quick and easy access to the information you need. Each section has pages for notes so you can include your thoughts on what this information means to your business or region.

Information about our visitor markets can be found on Tourism New Zealand's corporate website at **www.tourismnewzealand.com/research**.

PAST VISITORS

HISTORIC VIEW



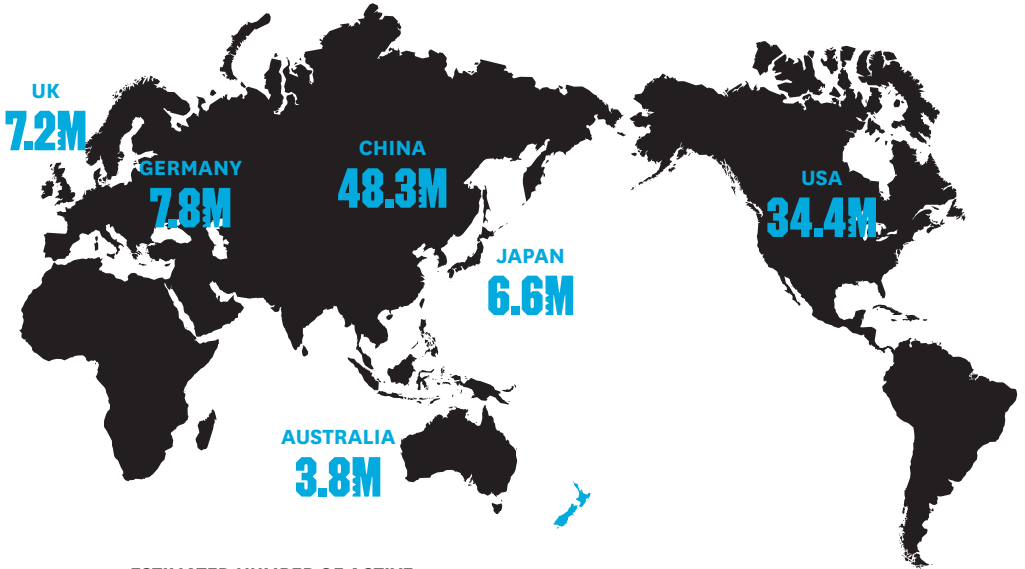
Past Visitor Research

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).

ACTIVE CONSIDERERS

FUTURE VIEW

FUTURE VIEW OF OUR TARGET AUDIENCE ACTIVE CONSIDERERS OF NEW ZEALAND



ESTIMATED NUMBER OF ACTIVE
CONSIDERERS IN OUR KEY MARKETS
YE JUNE 2018

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.



LAUREN

MELBOURNE,
AUSTRALIA

Age: 37

Work: Lawyer

Family: Married

“New Zealand is an awesome place for a short trip over a long weekend. It’s only three hours away and you’re able to squeeze a lot of activity into a short amount of time because everything is a lot closer than it is in Australia.”

LAUREN'S TRAVEL PREFERENCES

BUDGET

LUXURY

Likely to spend less on accommodation, opting for moderately priced hotels, but will spend more on activities.

CITY

NATURE

As a snowboarder, breath-taking scenery is highly appealing.

OBSERVE

IMMERSE

She wants to experience the excitement and thrills that New Zealand has to offer.

INDIVIDUAL

GROUP

Planning the trip herself, she wants freedom to choose how they spend their time.

RELAXATION

EXCITEMENT

Lauren wants to enjoy a mix of challenging and relaxing activities. It's important that she allocates some time to relax and unwind during the holiday.

STRUCTURE

SPONTANEOUS

They will have a plan for most days of their holiday so they can maximise how much they see and do.



AUSTRALIAN VISITOR FACTS

48%
under 35

42%
university educated

12%
household
income above
\$140,000AUD



TOP PREFERRED COUNTRIES TO VISIT:

- New Zealand
- UK
- USA
- Thailand

WHY NEW ZEALAND FOR LAUREN?

Lauren and her partner love to travel. New Zealand is highly appealing as a medium length holiday without having to travel too far.



MY EVERYDAY LIFE IN AUSTRALIA:

- ✓ Busy
- ✓ Bustling city living
- ✓ Career focused




NEW ZEALAND APPEAL:

- ✓ Proximity — Not too far to travel for a holiday
- ✓ Have fun and try new things
- ✓ Opportunity to relax and unwind towards the end of the holiday

DESIRES FOR MY HOLIDAY:

To experience the excitement and thrills New Zealand has to offer while enjoying the relaxing side of a New Zealand getaway.

TOP ACTIVITIES



Adrenaline and high intensity activities



Beaches and native forests

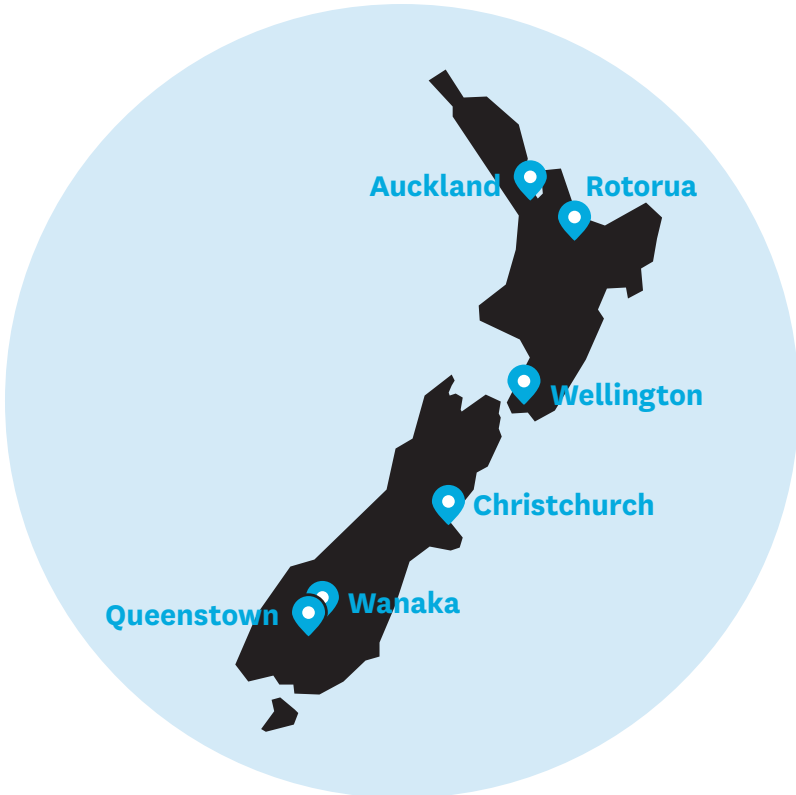


Tramping



Food and wine

LIKELY ITINERARY





OUTLINE OF LAUREN'S NEW ZEALAND HOLIDAY



Approx
\$2,700 pp



9-day stay



Independently
planned



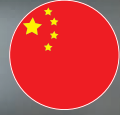
Hotel-based



Self drive/
rented vehicle

LAUREN'S EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- ✓ Lauren will have most of their days planned out to maximise how much they can see and do. This will include allocated times to relax and unwind
- ✓ She's looking for a holiday that has a mix of challenging and relaxing activities
- ✓ Over the course of their trip Lauren and her partner will predominantly travel in a rented vehicle, giving them the freedom to see and do as much as possible. They will likely rent another car in Queenstown when they travel the South Island
- ✓ During their 9-day holiday, they'll travel around both the North and South Island. Staying mostly in the main tourist areas, they'll drive to visit attractions and day trips further afield
- ✓ Having grown up with *The Lord of the Rings*, Lauren is excited to visit Hobbiton
- ✓ Lauren and her partner look forward to doing some tramping, at least a full day trek if not overnight somewhere
- ✓ Adrenaline and high intensity activities (bungy jumping, zorbing, etc.) are highly appealing, and will be a feature of the New Zealand experience
- ✓ Lauren and her partner will also explore the beautiful beaches, native forests and other natural attractions that make New Zealand unique.



XIAO BAI

SHANGHAI, CHINA

Age: 34

Work: Senior Executive

Family: Married

“The chance to escape my daily routine excites me, but planning a trip is time consuming and difficult when information is not in Mandarin. I look for guidance when planning my holiday to ensure it’s right for me and I can just focus on enjoying the moment.”

XIAO BAI'S TRAVEL PREFERENCES

BUDGET

LUXURY

Prepared to pay for great experiences and top-level attractions.
High level of service expected.

CITY

NATURE

Desire to experience nature, but not venture too far from the modern comforts of urban living.

OBSERVE

IMMERSE

Safety a key consideration – activities can be enjoyed by observation rather than needing a level of activity.

INDIVIDUAL

GROUP

Groups provide a sense of familiarity – preference for older Chinese.
Xiao Bai represents growing number of FIT Chinese visitors.

RELAXATION

EXCITEMENT

Adventure is balanced with natural attractions and rejuvenation to unwind from the bustling Shanghai life.

STRUCTURE

SPONTANEOUS

Preference is for the majority of the holiday to be planned.

LIKELY TO INFORM / INSPIRE MY HOLIDAY PLANNING:

Online influencers and bloggers on Chinese platforms such as WeChat.



CHINESE VISITOR FACTS

32%

under 35

73%

university educated

79%

household
income above
¥180,000



TOP PREFERRED COUNTRIES TO VISIT:

New Zealand

Australia

Hawaii

France

WHY NEW ZEALAND FOR XIAO BAI?

In many ways New Zealand is the antithesis to life in China. Xiao Bai's cultural norms and life in China informs the way she sees the rest of the world, just as our understanding of the world is shaped by our culture and way of life.



MY EVERYDAY LIFE IN CHINA:

- ✓ Busy
- ✓ Time-poor
- ✓ Technology heavy
- ✓ Vibrant shopping and nightlife




NEW ZEALAND APPEAL:

- ✓ A rejuvenating holiday destination
- ✓ Where I can get in touch with nature; open spaces, beautiful landscapes & broaden my mind
- ✓ Somewhere I can relax, indulge & pamper myself

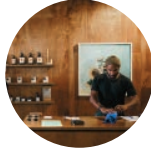
DESIRES FOR MY HOLIDAY:

To feel free-spirited, relaxed, safe and comfortable.

TOP ACTIVITIES



Short walks, views you can access by car



Premium shopping & locally made

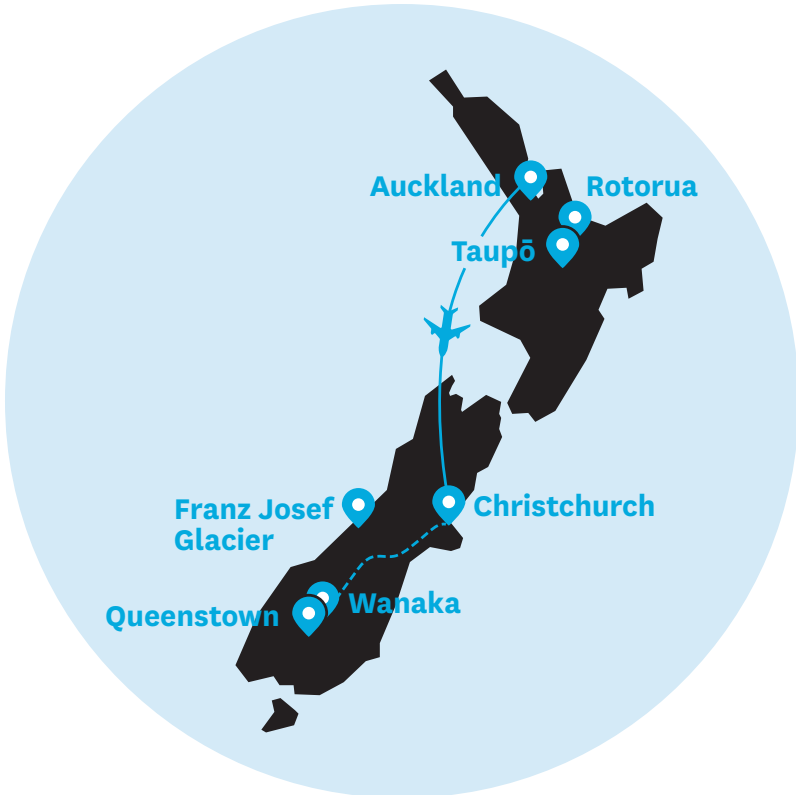


Lower intensity e.g. geothermal, national park, unique wildlife



Museums and art galleries

LIKELY ITINERARY





OUTLINE OF XIAO BAI'S NEW ZEALAND HOLIDAY



Approx
\$5,200 pp



2-week stay



Structured
sightseeing



Hotel-based



Bus travel/
rental cars

XIAO BAI'S EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- ✓ She tends to stick to the “must dos” of New Zealand rather than straying too far off the beaten track
- ✓ She's prepared to pay for great experiences and top-level service
- ✓ Given New Zealand is a long haul destination, this holiday is a big investment of time for both Xiao Bai and her partner
- ✓ Other places on Xiao Bai's list are: Milford Sound, Franz Josef Glacier, Rotorua thermal activity, glow-worm caves
- ✓ Images and sharing content with friends and family on social networks is an important part of her experience in New Zealand.



MELISSA

LOS ANGELES, USA

Age: 37

Work: Senior Executive

Family: Married with one child

USA

“New Zealand is a place I’ll only visit once, so I want to maximise my time while I’m here and do the things I want to do. This means combining a range of experiences from hiking to culture to more luxurious experiences.”

MELISSA'S TRAVEL PREFERENCES

BUDGET

LUXURY

Will be looking for flight and accommodation deals before booking her New Zealand holiday, so she can spend more of her travel budget on arrival.

CITY

NATURE

Keen to be immersed in New Zealand nature, including visiting national parks, beaches, geothermal sites and wildlife experiences.

OBSERVE

IMMERSE

Looking for a combination of challenging and relaxing activities, including national parks.

INDIVIDUAL

GROUP

Using primarily rental vehicles to explore throughout the trip.

RELAXATION

EXCITEMENT

Keen to unwind after a day of exploring by enjoying hot pools, local food and wine. Visiting local museums and galleries is also a relaxing aspect of the visit.

STRUCTURE

SPONTANEOUS

Some activities planned, but also some flexibility in the itinerary.

USA



USA VISITOR FACTS

36%
under 35

32%
university educated

14%
household
income above
\$125,000USD



TOP PREFERRED COUNTRIES TO VISIT:

New Zealand
Australia
Italy
Caribbean

WHY NEW ZEALAND FOR MELISSA?

Melissa is a busy mum, juggling family and a full-time job as a senior executive. Melissa and her husband love to travel and New Zealand has been on their wish list for some time, finding the right time to take a holiday has been a barrier to realising their dream to visit New Zealand.



MY EVERYDAY LIFE IN THE USA:

- ✓ Busy, working mum
- ✓ Time-poor
- ✓ Vibrant lifestyle living in LA



NEW ZEALAND APPEAL:

- ✓ To get in touch with nature
- ✓ To feel a sense of adventure
- ✓ To experience local culture and lifestyle

DESIRES FOR MY HOLIDAY:

To explore new things, have fun and enjoy myself, taking a break from the pressures of everyday life.

TOP ACTIVITIES



Short walks



Museums and art galleries



Food and wine

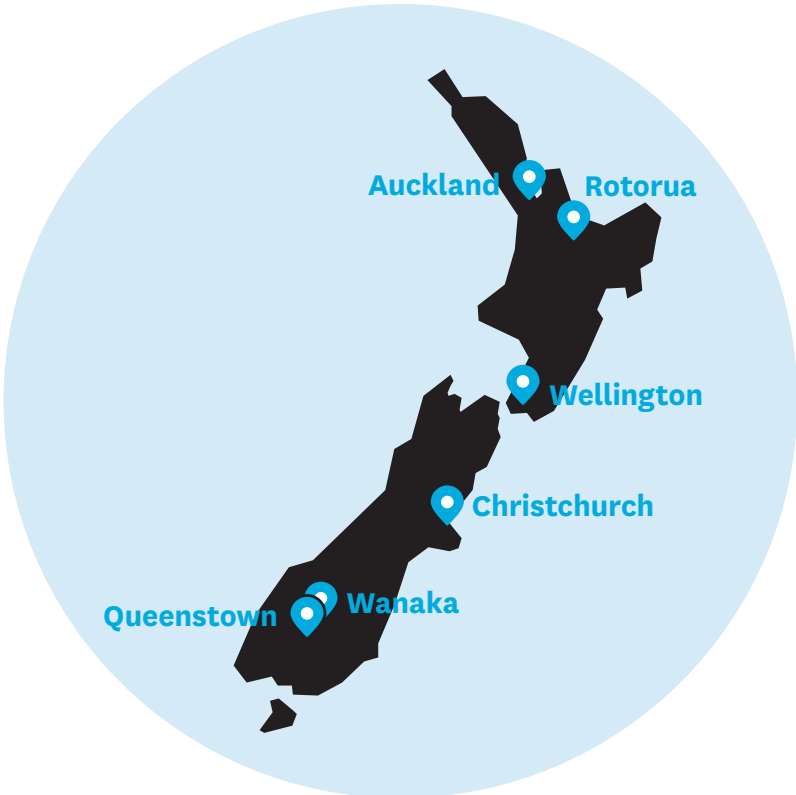


Beaches



Cultural activities

LIKELY ITINERARY





OUTLINE OF MELISSA'S NEW ZEALAND HOLIDAY



Approx
\$3,900 pp



12-day stay



Sightseeing



Hotel-based



Rental cars

MELISSA'S EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- ✓ Melissa and her husband are planning their trip themselves. They're planning a self-drive holiday to fully explore New Zealand, visiting both the North and South Islands, and spending a few days in several places
- ✓ Melissa prefers to travel comfortably, she doesn't mind spending a little more when it comes to accommodation. They'll be staying in a combination of hotels (most of the time), motels and B&B's
- ✓ They want to experience first-hand what it's like to live the local lifestyle, so they'll mostly use a rental car to get around and occasionally use a taxi
- ✓ They're excited about a holiday that has a mix of both challenging and relaxing activities
- ✓ Unlikely to stray off the beaten track, they'll focus on visiting the key tourist hot spots. They'll immerse themselves in nature, visiting national parks, beaches, geothermal sites, glaciers, and wildlife experiences – particularly glow worms and native birds
- ✓ Adrenaline and high intensity activities have little appeal to Melissa and her family
- ✓ Visiting Hobbiton and sampling local food and wines, and learning about traditional culture is also on the to-do list.



JAMES

LONDON,
UNITED KINGDOM

Age: 47

Work: Marketing Director

Family: Married



UNITED KINGDOM

“Nature is the reason I’ve come to New Zealand. Not just the inspiration from *The Lord of the Rings* but from what I’ve read and heard from others. The walks, waterfalls... all of it.”

JAMES' TRAVEL PREFERENCES

BUDGET

LUXURY

Open to mid to low-level accommodation and may stay with friends and family, allowing him to spend more on activities.

CITY

NATURE

Wants to experience the great New Zealand outdoors.

OBSERVE

IMMERSE

Looking for a balance of challenging and relaxing activities.

INDIVIDUAL

GROUP

This will be a self-planned trip. He is not interested in a group tour or a packaged deal.

RELAXATION

EXCITEMENT

The ideal holiday has a mix of challenging and relaxing activities, and the opportunity to experience local lifestyle.

STRUCTURE

SPONTANEOUS

Some activities will be planned but allowing flexibility.

UNITED KINGDOM



UK VISITOR FACTS

38%

under 35

39%

university educated

23%

household
income above
£50,000



TOP PREFERRED COUNTRIES TO VISIT:

New Zealand

Australia

Canada

USA

WHY NEW ZEALAND FOR JAMES?

James and his partner want to visit New Zealand to experience the country's iconic landscapes and scenery. While they're here, they will also look to venture outside of their comfort zone with some high adrenaline activities. He wants to experience all aspects of New Zealand, from the serene lakes and rivers to sampling local cuisine and bars, and the hospitality of locals.



MY EVERYDAY LIFE IN THE UK:

- ✓ Time-poor
- ✓ Hard-working
- ✓ City-living; hustle and bustle of everyday life



NEW ZEALAND APPEAL:

- ✓ A holiday with a mix of challenging & relaxing activities
- ✓ Opportunity to experience the great New Zealand outdoors
- ✓ Sampling local food and wine, and the hospitality of New Zealanders

DESIRES FOR MY HOLIDAY:

To experience iconic landscapes and scenery, while also venturing outside of our comfort zone with some high adrenaline activities.

James and his partner are here for an enjoyable time — they respond well to light-heartedness and banter when interacting with locals.

TOP ACTIVITIES



Nature and wildlife



Challenging and relaxing activities



Geothermal sites



Nature walks

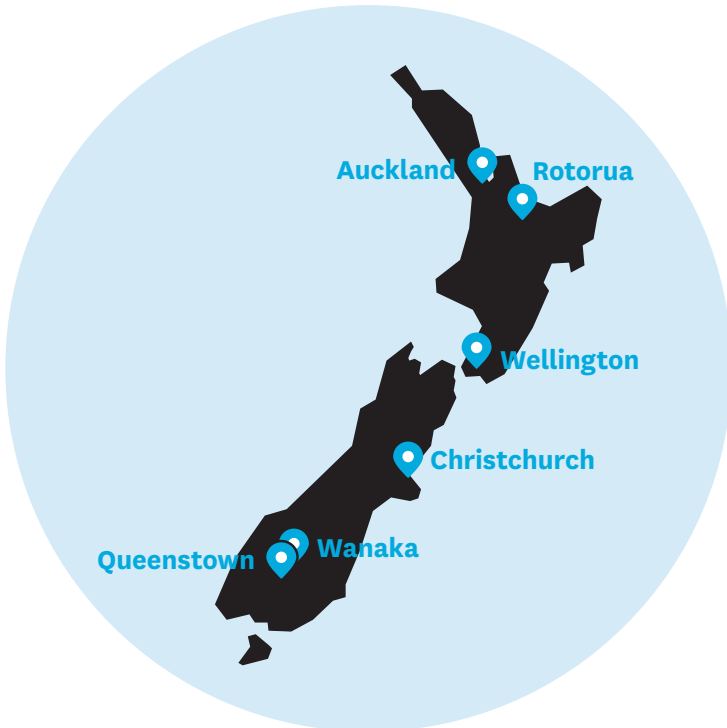


Experience Māori culture



Film locations

LIKELY ITINERARY





OUTLINE OF JAMES' NEW ZEALAND HOLIDAY



Approx
\$5,000 pp



2-3 week stay



Sightseeing



Friends and
family/hotels



Self-drive, likely a
campervan, ferry
between islands

JAMES' EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- ✓ Given the distance from London, James will have to plan and save enough annual leave from work before making this trip
- ✓ Like Kiwis, Brits have a high sense of independence - James and his partner are comfortable traveling on their own terms, which means they are prepared to look after themselves while on holiday
- ✓ James and his partner want to experience all aspects of New Zealand, from the serene lakes and rivers to sampling local cuisine and bars, and the hospitality of New Zealanders
- ✓ Along with his partner they want to experience the great New Zealand outdoors, including national parks, beaches, lakes and rivers, geothermal sites and wildlife experiences (especially seal colonies, native birds and glow worms)
- ✓ They are keen on nature walks, but prefer those under three hours' duration
- ✓ They'd like to experience Māori culture, and will stop during their road trip to visit a Māori landmark or pā site, as well as Te Papa
- ✓ High adrenaline activities are of interest to James such as rafting
- ✓ Film locations are a must-see for James. He recently watched *The Hobbit* and is excited to visit the film set while in New Zealand.



STEFAN

FRANKFURT,
GERMANY

Age: 39

Work: Finance Manager

Family: Married

“I love getting off the beaten track to feel like I’m experiencing nature in New Zealand as it should be – untouched and natural. It allows me to relax and reconnect.”

STEFAN'S TRAVEL PREFERENCES

BUDGET

LUXURY

Stefan and his partner will spend time camping, traveling in a rented vehicle and staying in good quality hotels.

CITY

NATURE

New Zealand has been a desired destination for some time. He wants to see the beauty that New Zealand is known for.

OBSERVE

IMMERSE

Hiking and exploring in nature are activities that Stefan and his partner are very interested in.

INDIVIDUAL

GROUP

They want to travel freely without worrying about other people's schedules.

RELAXATION

EXCITEMENT

They want to see and do all that New Zealand's natural landscape has to offer, including hikes and visits to national parks.

STRUCTURE

SPONTANEOUS

They will likely plan all details of their holiday themselves.



GERMAN VISITOR FACTS

56%
under 35

20%
university educated

15%
household income
above €48,000



TOP PREFERRED COUNTRIES TO VISIT:

New Zealand
Australia
Canada
USA

WHY NEW ZEALAND FOR STEFAN?

Stefan and his partner have been dreaming of visiting New Zealand for a while. Many of their friends and family have visited and say it's a beautiful country. He wants to see the natural beauty New Zealand is world famous for. Hiking and exploring in nature are activities that Stefan and his partner are most interested in, and is what drew them to New Zealand.



MY EVERYDAY LIFE IN FRANKFURT:

- ✓ Busy city living
- ✓ Routine-centric
- ✓ Time-poor



NEW ZEALAND APPEAL:

- ✓ Natural beauty
- ✓ Being in the outdoors
- ✓ Walking in national parks
- ✓ Culture

DESIRES FOR MY HOLIDAY:

Completing some of the Great Walks and visiting National Parks.

Stefan and his partner are highly interested in understanding and learning about Māori culture; and will visit several landmarks of Māori significance including the Waitangi Treaty Grounds.

TOP ACTIVITIES



Nature/Wildlife



Hiking

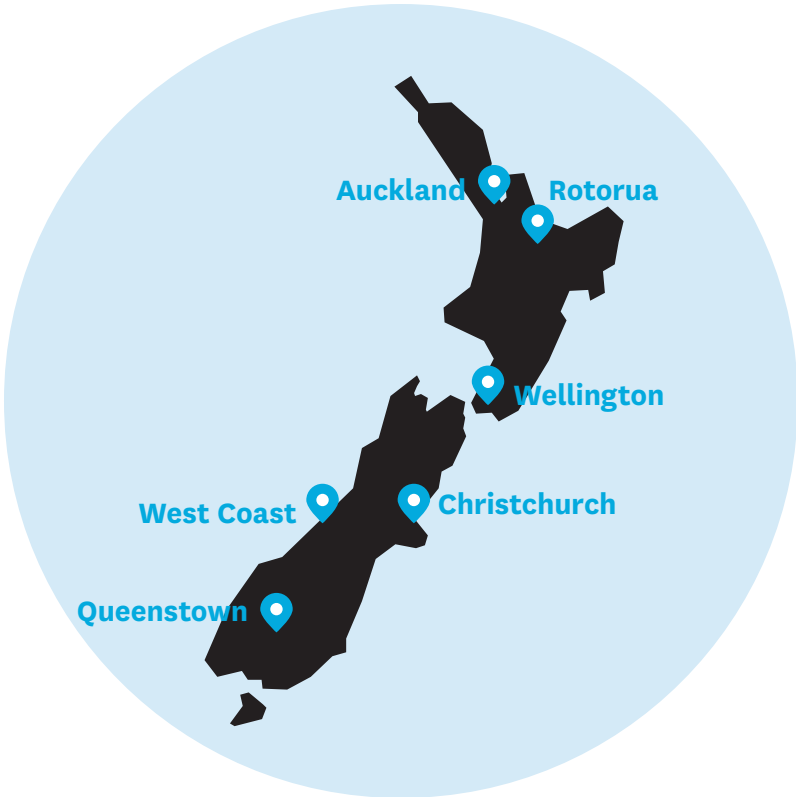


Sightseeing



Culture

LIKELY ITINERARY





OUTLINE OF STEFAN'S NEW ZEALAND HOLIDAY



Approx
\$6,400 pp



3-week stay



Independently
planned



Camping and
hotels



Self drive/
rented vehicle

STEFAN'S EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- ✓ Stefan and his partner are most excited about spending a few nights in the Franz Josef area as well as near the Nelson Lakes National Park
- ✓ They are less interested in adventure activities or 'tourist attractions' like bungee jumping – and more excited about day walks
- ✓ They are planning on exploring the geothermal attractions while in Rotorua
- ✓ They're also planning on joining a scenic boat tour, hoping to see whales and dolphins
- ✓ Learning about Māori culture is another highlight for them and they plan on visiting several landmarks of Māori significance including the Waitangi Treaty Grounds
- ✓ On some of their more relaxed days they'll visit places like Te Papa and the Auckland Art Gallery.



TAKUYA

TOKYO, JAPAN

Age: 39

Work: Partnership Manager

Family: Married

“When we do travel internationally, we want somewhere safe and easy to travel around with good quality accommodation, so we can have a comfortable stay, and somewhere that has plenty for us to do!”

TAKUYA'S TRAVEL PREFERENCES

BUDGET

LUXURY

Prefers to travel in comfort.

CITY

NATURE

Keen to see New Zealand's spectacular natural landscapes and scenery.

OBSERVE

IMMERSE

Happy to observe New Zealand culture, not interested in immersing himself like a local.

INDIVIDUAL

GROUP

Plans to use a hire car for some parts of the trip, but may use a tour bus if hesitant about driving in New Zealand.

RELAXATION

EXCITEMENT

Wants to have a good time and is interested in relaxing and recharging. Little interest in high adrenaline activities.

STRUCTURE

SPONTANEOUS

Most activities will be planned, with some flexibility in the schedule.



JAPANESE VISITOR FACTS

45%
under 35

55%
university educated

7%
household income
above ¥15,000,000



TOP PREFERRED COUNTRIES TO VISIT:

- New Zealand
- Australia
- Hawaii
- Guam

WHY NEW ZEALAND FOR TAKUYA?

Takuya and his partner have heard so many amazing things about New Zealand’s natural environment and want to experience it for themselves. They want to visit spectacular landscapes and scenery, while having a relaxing break from their busy life in Tokyo.



MY EVERYDAY LIFE IN TOKYO:

- ✓ Busy
- ✓ Time-poor
- ✓ Hard-working
- ✓ Vibrant city lifestyle





NEW ZEALAND APPEAL:

- ✓ Relax and rejuvenate
- ✓ A break from his busy life
- ✓ Landscape and scenery

DESIRES FOR MY HOLIDAY:

Interested in relaxing activities while in New Zealand, including enjoying local cuisine, short walks, hot pools and breath-taking scenery.

TOP ACTIVITIES



Natural landscape and scenery



Short walks

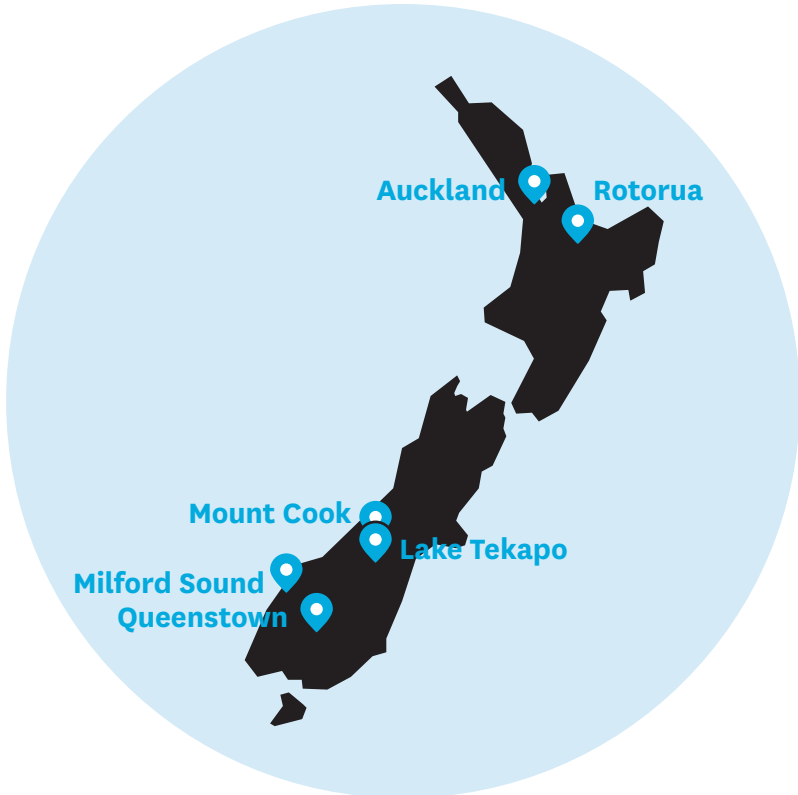


Hot pools



Local food and wine

LIKELY ITINERARY





OUTLINE OF TAKUYA'S NEW ZEALAND HOLIDAY



Approx
\$3,100 pp



1-week stay



Structured
sightseeing



Hotel-based



Bus travel/
hire car

TAKUYA'S EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- ✓ Takuya and his partner are planning most of their trip through a travel agent who can help them make the most out of their time in New Zealand
- ✓ They're not interested in high adrenaline activities, they want to come to New Zealand to have a good time and to feel refreshed and recharged
- ✓ They will mostly stay in hotels and will hire a car for parts of their trip. Takuya is a little hesitant about driving in New Zealand so will also look to use tour buses to visit attractions
- ✓ During their holiday they will travel around both the North and South Island, visiting some of the major tourist spots. They won't have enough time for lesser known areas
- ✓ Takuya and his partner are interested in relaxing activities while in New Zealand, including local cuisine, short walks, hot pools and breath-taking scenery
- ✓ Seeing the beautiful natural landscapes and scenery are a top priority for Takuya and his partner, including mountain ranges, beaches, lakes and rivers, and other natural attractions that make New Zealand unique.

NOTES

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ONLINE TOOL

Want to know which visitor market best suits your tourism offering? Or have an idea for a new tourism product or experience and want to know where to target your marketing? Try our Visitor Profile Tool to find out which high-value visitors from our six key visitor markets are the best match for your product.

Visit www.tourismnewzealand.com/visitorprofiletool to find out more.

**100% PURE
NEW ZEALAND**
newzealand.com