

CHINA

Visitors & Market Insights

July 2024



Lake Tekapo/Takapō
Canterbury



**100% PURE
NEW ZEALAND**

TOURISM NEW ZEALAND'S MARKET APPROACH

Our Purpose

Enrich Aotearoa New Zealand and all who visit.

- Tourism must enrich New Zealand and the wellbeing of New Zealanders – contributing more than what it takes.
- Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud.

Our Role

To promote New Zealand as a visitor destination to key markets around the world. Tourism New Zealand's new four-year strategy focuses on building desire for New Zealand as a year-round destination and converting that desire into off-peak arrivals. Off-peak seasons refer to the seasons between March-November in New Zealand – autumn, winter and spring.

Market Approach

Tourism New Zealand focuses on shaping the visitor mix through activity across a diverse portfolio of markets.

Our markets are determined by factors including there being an existing or potential group of people actively considering New Zealand as a destination.

Active Considerers

Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Stats NZ's International Visitor Arrivals and MBIE's International Visitor Survey.

Mix of Markets

The mix of markets covered in our Market Snapshots include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom
- India



TRAVELLER INSIGHTS

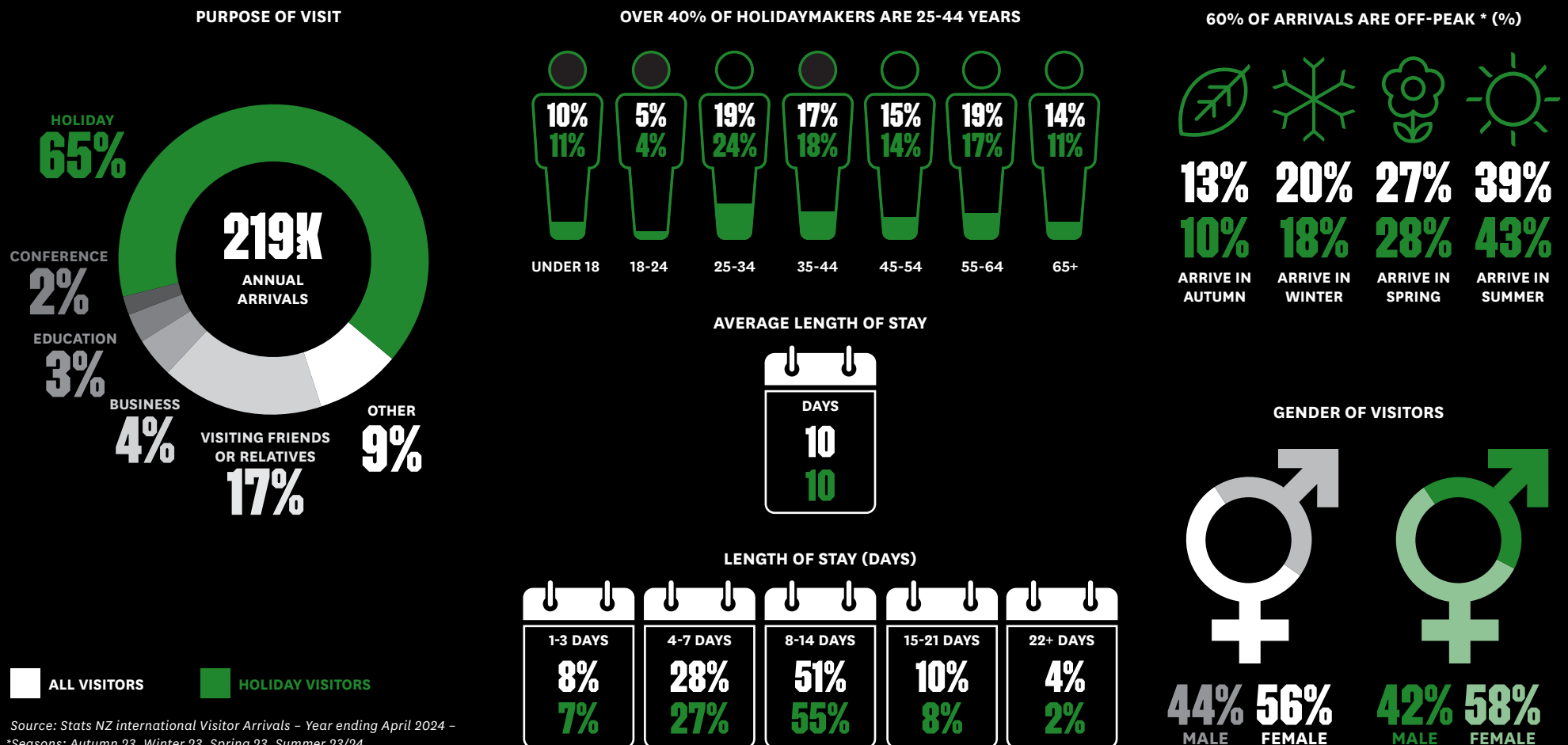
Latest China market arrival insights

CHINA

TRAVELLER INSIGHTS



Last year, 219,000 Chinese travellers (9.5% of all arrivals) visited New Zealand, with 143,000 (65%) of them being holiday visitors.



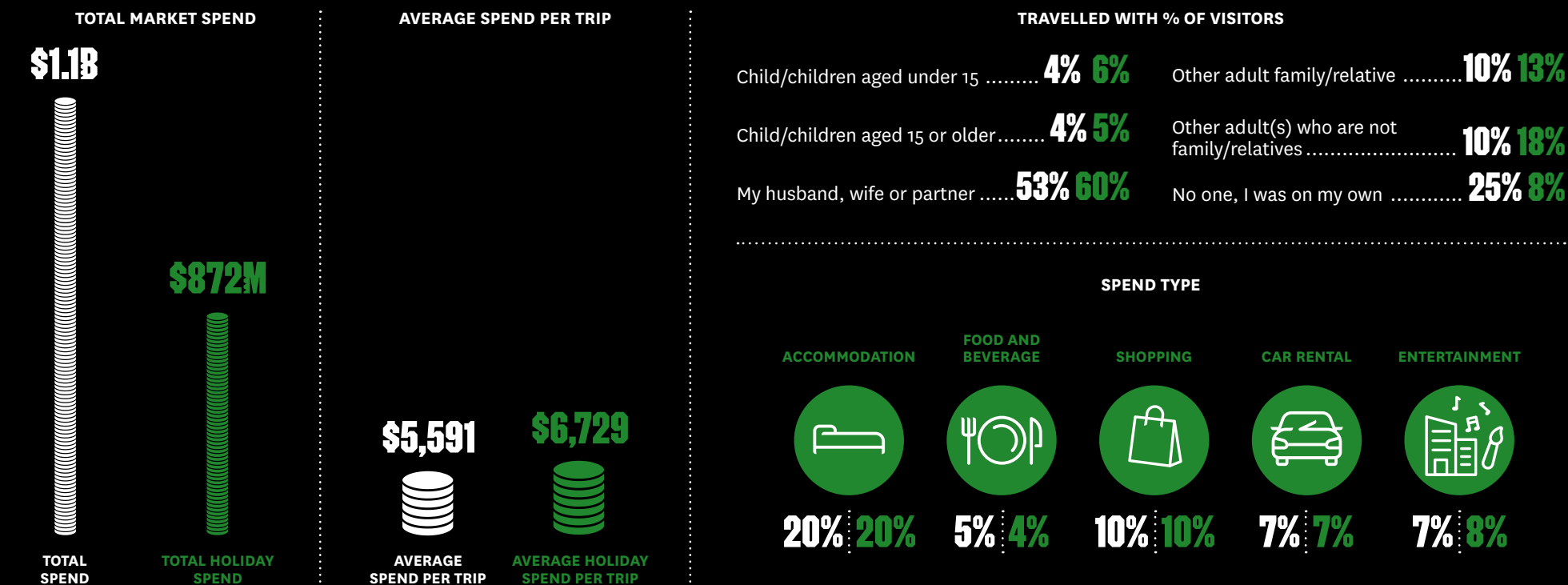
Source: Stats NZ international Visitor Arrivals – Year ending April 2024 –
 *Seasons: Autumn 23, Winter 23, Spring 23, Summer 23/24

CHINA

VISITOR SNAPSHOT



Chinese visitors spent \$1.1 billion in New Zealand, with \$872 million by holidaymakers. The average spend per trip was \$5,591, rising to \$6,729 for holiday visitors. One-fifth of spending was on accommodation, and visitors were most likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

Source: MBIE, International Visitor Survey. Year ending March 2024

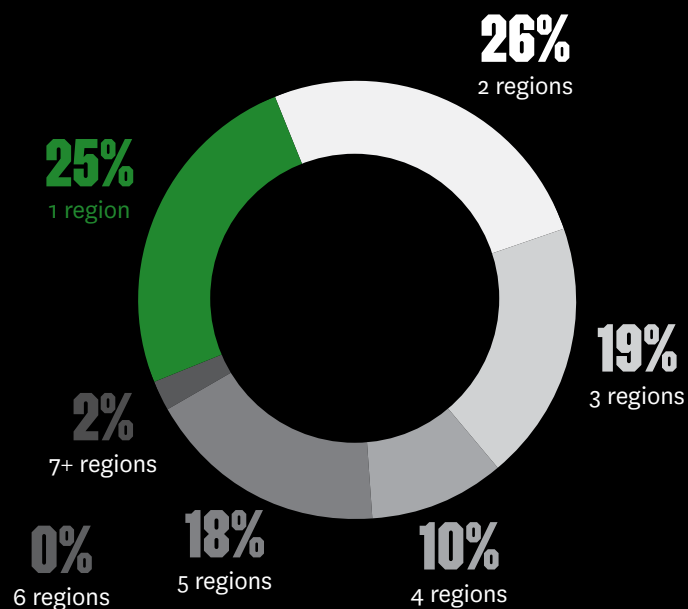
CHINA

TRAVELLER INSIGHTS

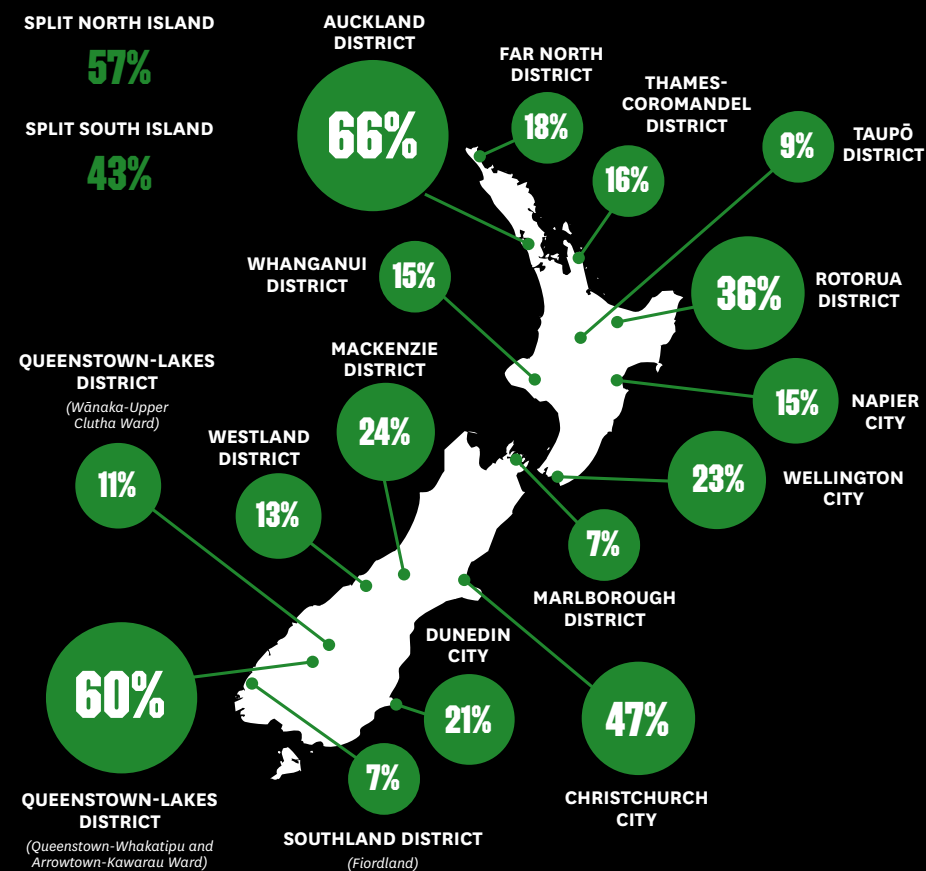


Chinese holiday visitors spent the majority of time in the North Island (57% of nights) while 43% of nights were spent in the South Island. Among them, 30% visited four or more regions, with Auckland being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



Source: MBIE, International Visitor Survey. Year ending March 2024

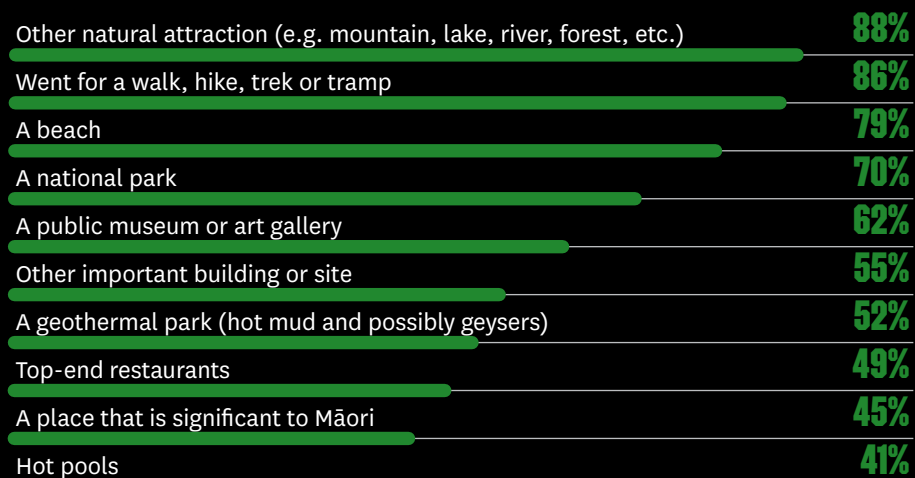
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TRAVELLER INSIGHTS

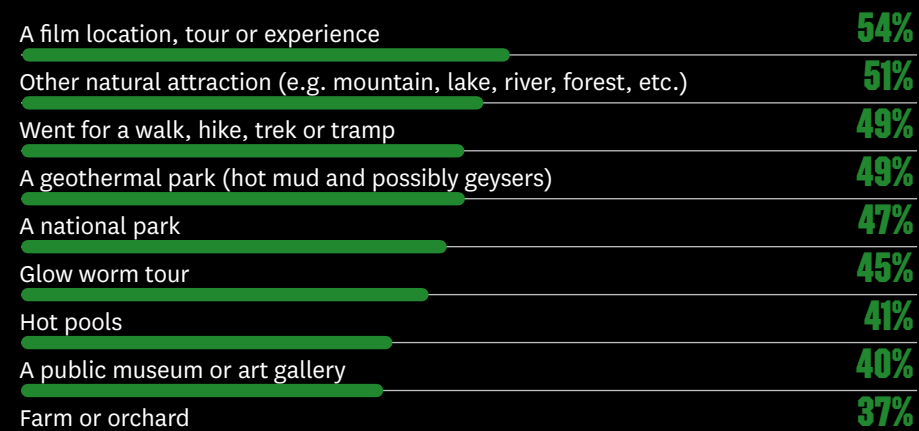


Most visitors favoured natural attractions like mountains and lakes, hiking, and national parks, with significant participation in beach visits and museum/art gallery tours. Over half of Chinese holiday visitors participated in a film inspired experience during the off-peak seasons.

TOP ACTIVITIES ENJOYED BY CHINESE IN NEW ZEALAND - SUMMER



TOP ACTIVITIES ENJOYED BY CHINESE IN NEW ZEALAND - OFF-PEAK (MAR - NOV)



88%

Other natural attractions



86%

Walk, hike, trek or tramp



79%

A beach



54%

A film location, tour or experience



51%

Other natural attractions



49%

Walk, hike, trek or tramp

CHINA

TRAVELLER INSIGHTS



Most visitors opted for hotels or booked houses or apartments online. Rental cars and taxis/shuttles were popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



56%

House/Apartment booked online (AirBnb etc)



48%

Hotel



28%

Motel, Motor Inn or Serviced Apartment



15%

Backpackers



13%

Yacht or other boat



13%

Luxury accommodation



10%

House/flat that you paid some rent for



9%

Bed and Breakfast



7%

With family or friends



3%

Youth Hostel, YMCA, YWCA

MODES OF TRANSPORT



43%

Rental car



33%

Taxi/shuttle



28%

Plane (within New Zealand)



23%

Uber or other app based



19%

Local bus service



18%

Tour bus



15%

Yacht



13%

Other bus service



10%

Helicopter



6%

Ferry (not North-to-South Island ferry)

OUR AUDIENCES

Our Active Considerers

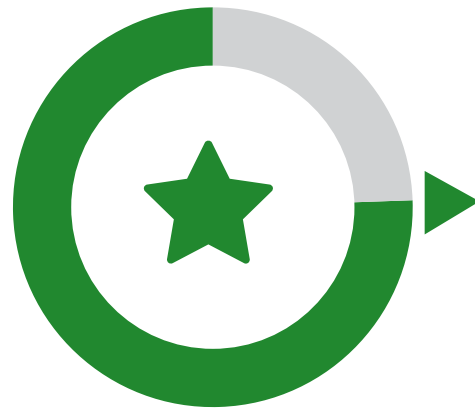
Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three years, and they have the means to do so.

CHINA

ACTIVE CONSIDERERS



There are around 63 million Active Considerers in China, with 62% identifying New Zealand as their top destination choice.



83%

OF THE CHINESE ONLINE AUDIENCE 18-74 Y/O FIND NEW ZEALAND APPEALING AS A DESTINATION (87 MILLION = 14% Y-O-Y INCREASE)



60%

OF THE ONLINE AUDIENCE 18-74 ARE ACTIVE CONSIDERERS (63 MILLION = 37% Y-O-Y INCREASE)



**#1
ACs**

62%

OF ACTIVE CONSIDERERS RANK NEW ZEALAND AS #1 PREFERRED DESTINATION (39 MILLION = 28% Y-O-Y INCREASE)

SEASONAL CONSIDERATION

When would Active Considerers visit New Zealand (Non-exclusive)



34%



47%



26%



33%

TOTAL OFF-PEAK CONSIDERATION*



81%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

*Percentage of active considerers who would consider visiting between March and November

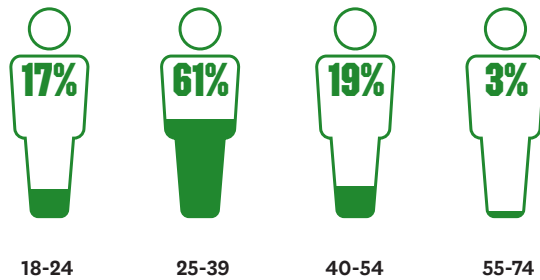


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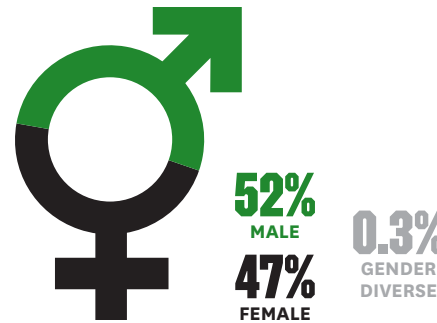
ACTIVE CONSIDERERS

Active Considerers skew 25-39, are fairly spread across the main cities in China, and 1 in 4 have a monthly household income of over 60,000CNY.

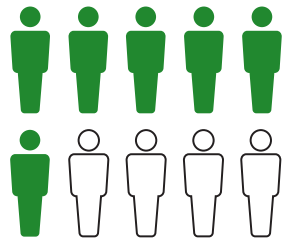
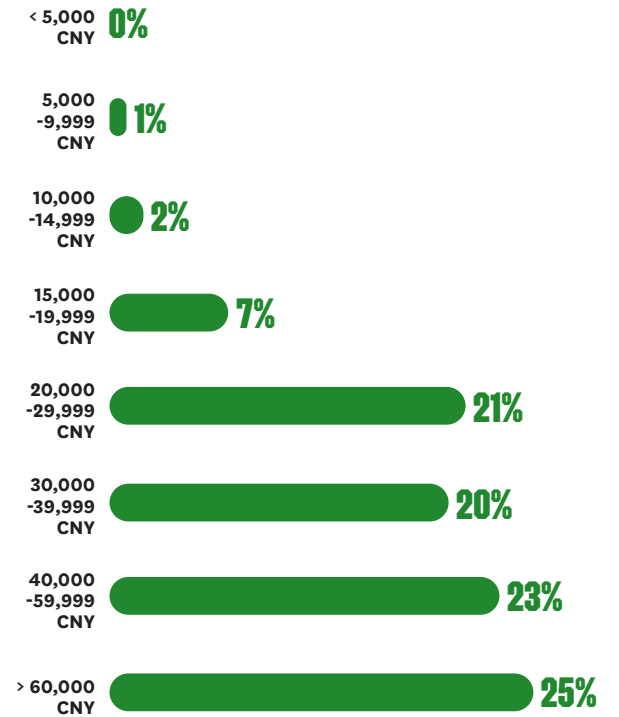
AGE SEGMENT OF ACTIVE CONSIDERERS



GENDER OF ACS



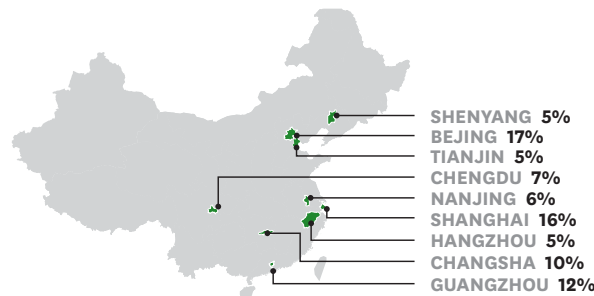
MONTHLY HOUSEHOLD INCOME SPREAD - ACS



MORE THAN 6 IN 10 ACS ARE BETWEEN 25-39

25-39

ACTIVE CONSIDERERS ARE FAIRLY SPREAD IN THE MAIN CITIES IN CHINA



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

CHINA

ACTIVE CONSIDERERS



Among Chinese Active Considerers, New Zealand is seen as a place perfect for experiencing a new culture, with beautiful natural scenery that is ideal for a family holiday.

BRAND ASSOCIATIONS



OFFERS OPPORTUNITIES TO EXPERIENCE LOCAL CULTURE

63%



SPECTACULAR NATURAL LANDSCAPES AND SCENERY

63%



IDEAL FOR A FAMILY HOLIDAY

62%



IT IS AFFORDABLE TO FLY TO THIS DESTINATION

61%



I WOULD FEEL SAFE TRAVELLING AROUND THIS DESTINATION

61%



A PLACE YOU CAN ESCAPE FROM THE ORDINARY

61%



THE ENVIRONMENT THERE IS CLEAN AND UNPOLLUTED

61%



HAS AMAZING BEACHES AND COASTLINES

61%



A DESTINATION THAT EMBRACES VISITORS OF ALL CULTURES.

60%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

CHINA

ACTIVE CONSIDERERS



Getting in touch with nature, learning and exploring, and relaxation are key reasons to visit for our Chinese Active Considerers.

REASONS TO VISIT NEW ZEALAND



TO GET IN TOUCH WITH NATURE

46%



TO LEARN & EXPLORE NEW THINGS

41%



TO FEEL RELAXED AND REFRESHED

40%



TO EXPERIENCE BEAUTIFUL LANDSCAPES/SCENERY

38%



TO HAVE FUN & ENJOY MYSELF

36%



TO TAKE A BREAK FROM THE ROUTINE, STRESSES AND PRESSURES OF EVERYDAY LIFE

30%



TO INTERACT WITH PEOPLE OF A DIFFERENT CULTURE OR LIFESTYLE

29%



TO CONNECT AND SPEND TIME WITH IMPORTANT PEOPLE IN MY LIFE

23%



TO INDULGE & PAMPER MYSELF

19%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

CHINA

ACTIVE CONSIDERERS



Our Active Considerers are highly interested in experiencing New Zealand’s beaches and coasts, and living like a local including exploring local towns and trying our cuisine.

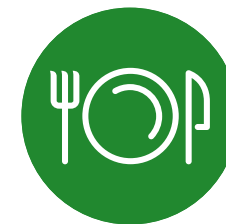
ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



BEACHES & COASTS
83%



EXPERIENCING LOCAL TOWNS
83%



TRYING LOCAL CUISINE
81%



BATHING IN HOT/MUD POOLS
79%



MARINE RESERVES (PROTECTED CONVERSATION AREAS)
79%



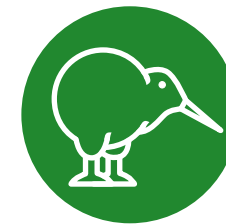
TRYING LOCAL WINE OR BEER
79%



MUSEUMS & GALLERIES
78%



HISTORICAL SITES AND HERITAGE SITES
78%



WILDLIFE EXPERIENCES
78%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

CHINA

ACTIVE CONSIDERERS



Key concerns and knowledge gaps for prospective visitors include safety of adventure activities, weather conditions and the quality and variety of cuisine available.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



HOW SAFE IT IS TO PARTICIPATE IN ADVENTURE ACTIVITIES

27%



WHAT THE WEATHER IS LIKE

25%



THE QUALITY AND VARIETY OF FOOD AND BEVERAGE OPTIONS

24%



HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS

24%



HOW EASY IT IS TO TRAVEL AROUND

23%



HOW WELCOMING THE LOCALS ARE

22%



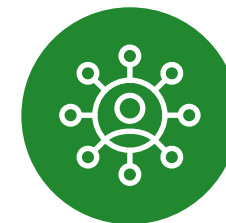
WHAT/WHERE THE RECOMMENDED THINGS TO SEE AND DO ARE

21%



THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND

20%



WHETHER THERE IS A BROAD ENOUGH VARIETY OF THINGS TO SEE AND DO

20%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor data 6-month period ending May 2024

NGĀ MIHI