

# UNITED KINGDOM

## Visitors & Market Insights

July 2024



# 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 UK market arrival insights

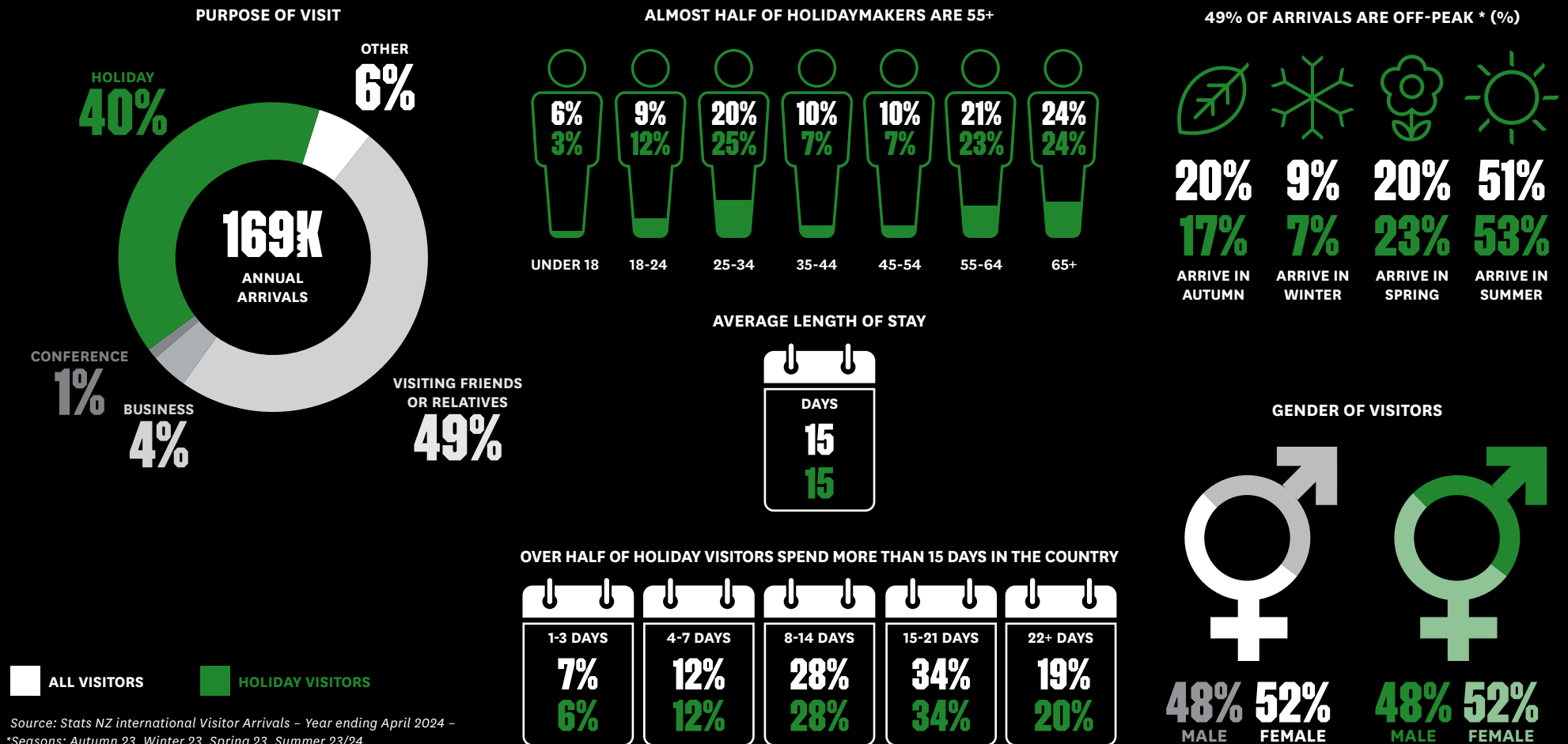




TRAVELLER INSIGHTS



Last year, 169,300 UK travellers (3.8% of all arrivals) visited New Zealand, with 68,300 (40%) of them being holiday visitors.



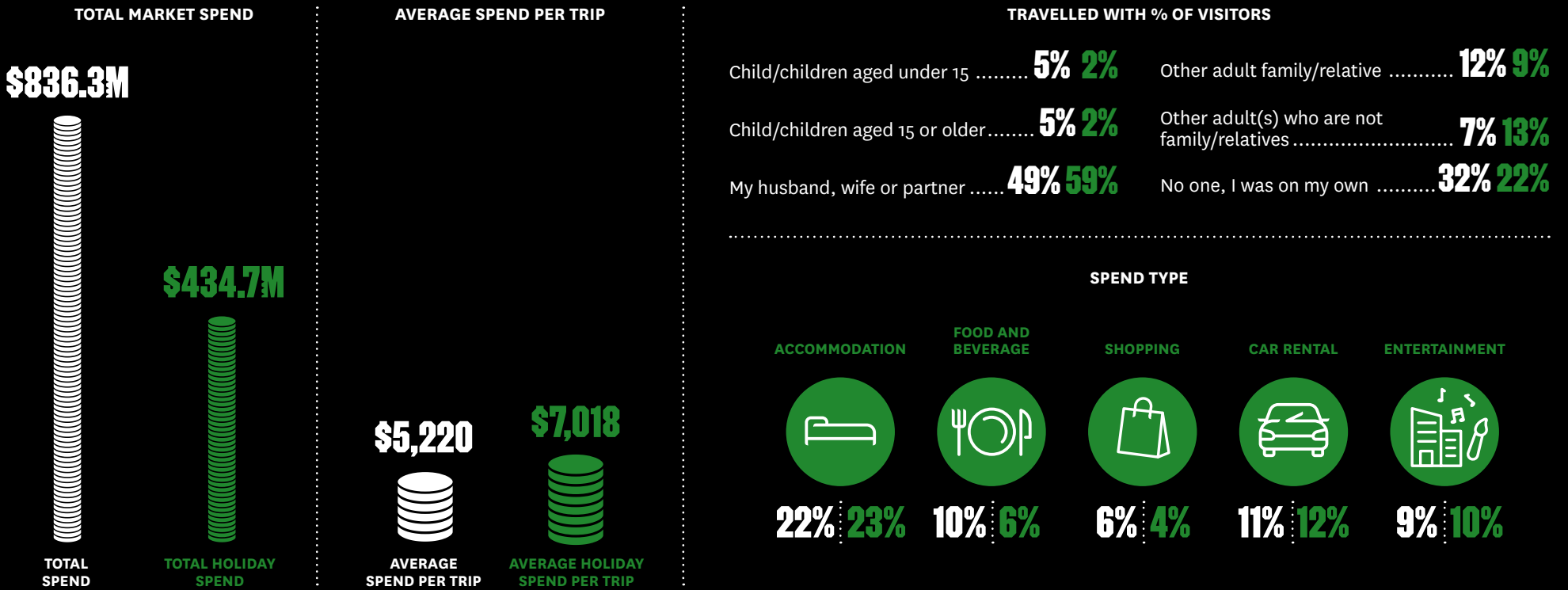
Source: Stats NZ international Visitor Arrivals – Year ending April 2024 –  
 \*Seasons: Autumn 23, Winter 23, Spring 23, Summer 23/24



VISITOR SNAPSHOT



UK visitors spent \$836.3 million in New Zealand, with \$434.7 million by holidaymakers. The average spend per trip was \$5,220, rising to \$7,018 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

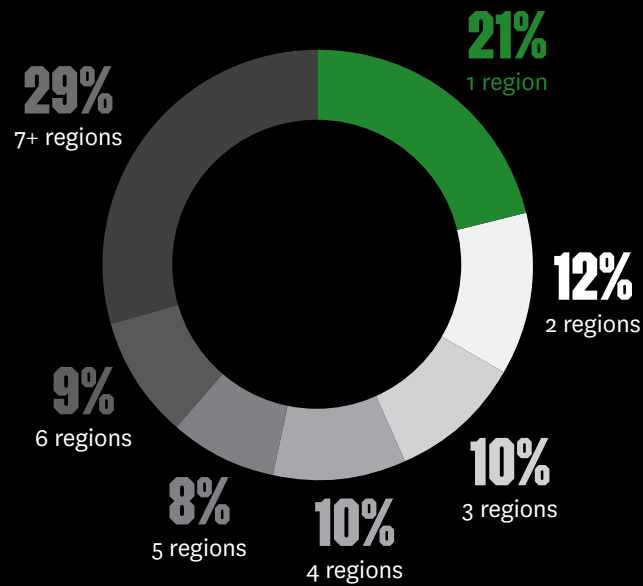


TRAVELLER INSIGHTS

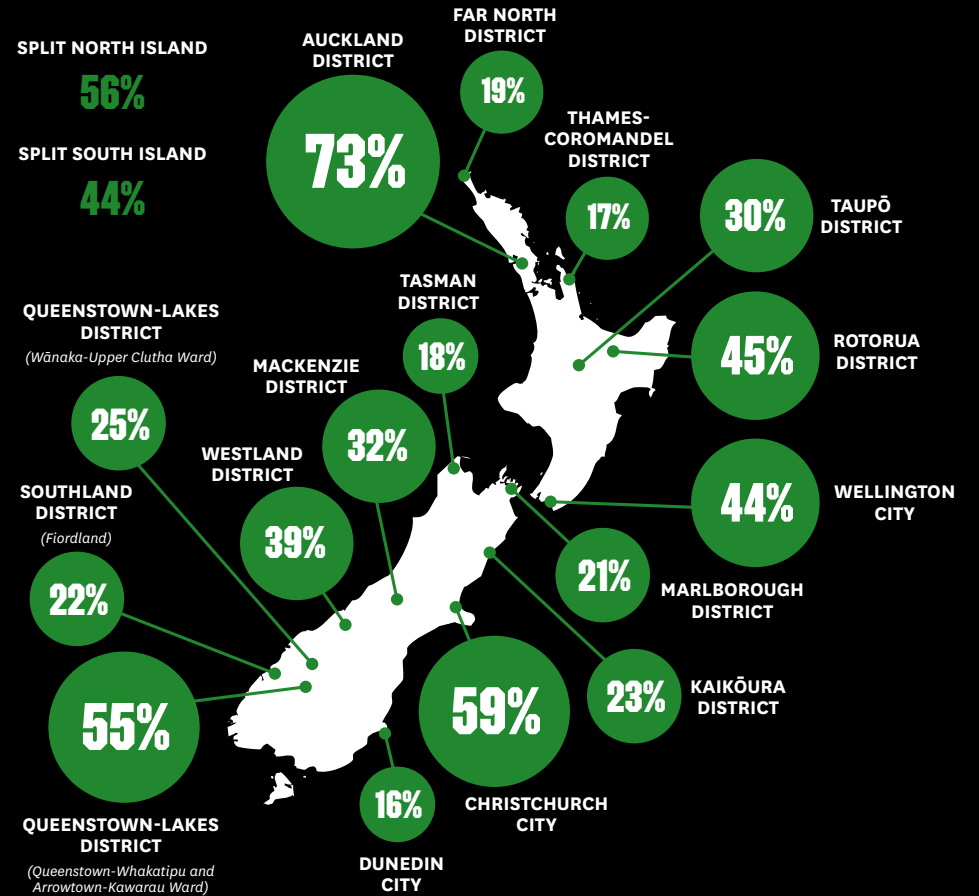


UK holiday visitors spent a fairly even amount of time in the North Island (56% of nights), and the South Island (44% of nights). Among them, 56% visited four or more regions, with Auckland being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



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

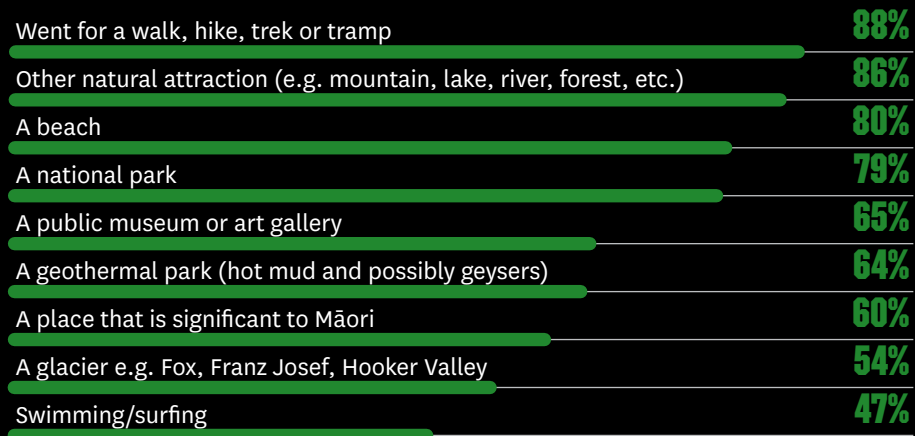


TRAVELLER INSIGHTS

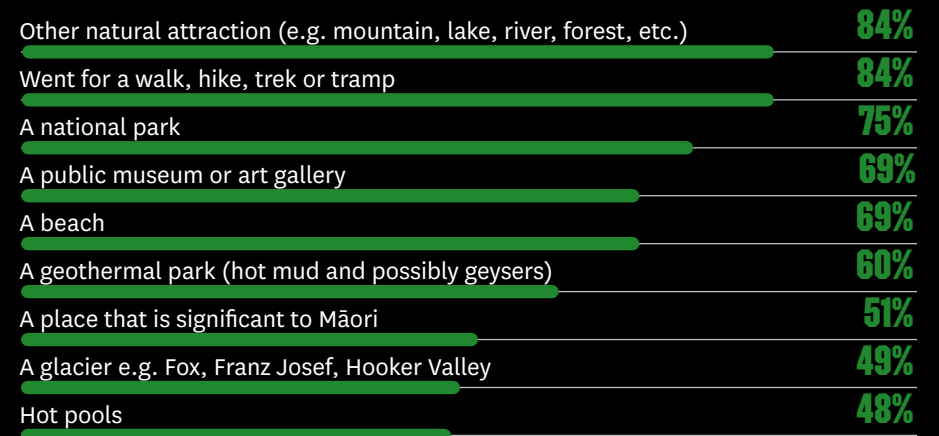


Most visitors favoured natural attractions like mountains and lakes, hiking, and national parks, with significant participation in beach visits and museum/art gallery tours. Nearly half of visitors visited hot pools during the off-peak season.

TOP ACTIVITIES ENJOYED BY UK VISITORS IN NEW ZEALAND - SUMMER



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



88%

Walk, hike, trek or tramp



86%

Other natural attractions



80%

A beach



84%

Other natural attractions



84%

Walk, hike, trek or tramp



75%

A national park



TRAVELLER INSIGHTS



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

POPULAR ACCOMMODATION TYPES



**57%**

Hotel



**39%**

House/Apartment booked online (AirBnb etc)



**27%**

With family or friends



**27%**

Motel, Motor Inn or Serviced Apartment



**22%**

Backpackers



**18%**

Other (paid) camping ground/holiday park



**17%**

Youth Hostel, YMCA, YWCA



**13%**

Bed and Breakfast



**11%**

Luxury Accommodation

MODES OF TRANSPORT



**40%**

Taxi/shuttle service



**36%**

Rental car



**28%**

The ferry between the North Island and the South Island



**25%**

Local bus service



**23%**

Uber or other app based



**23%**

Plane (within New Zealand)



**22%**

Tour bus



**13%**

Car or van owned by you/family/friend(s)/company



**13%**

Other boat or ship



# OUR AUDIENCES

## Our Active Considerers

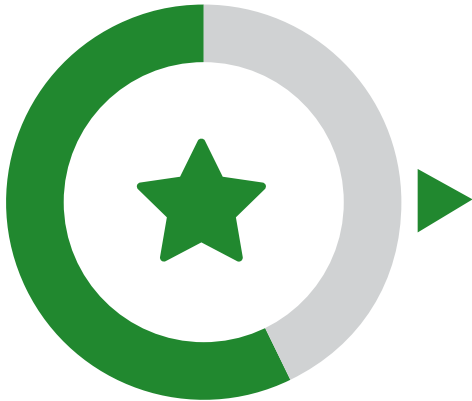
Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three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

**UK**

**ACTIVE CONSIDERERS**



There are around 8.4 million Active Considerers in the UK, with 43% identifying New Zealand as their top destination choice.



**55%**

OF THE UK ONLINE AUDIENCE 18-74 Y/O FIND NEW ZEALAND APPEALING AS A DESTINATION (24.8 MILLION = STABLE Y-O-Y)



**19%**

OF THE ONLINE AUDIENCE 18-74 ARE ACTIVE CONSIDERERS (8.4 MILLION = 5% Y-O-Y INCREASE)



**43%**

OF ACTIVE CONSIDERERS RANK NEW ZEALAND AS #1 PREFERRED DESTINATION (3.6 MILLION = 35% Y-O-Y INCREASE)

**SEASONAL CONSIDERATION**

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



**50%**



**27%**



**18%**



**26%**

**TOTAL OFF-PEAK CONSIDERATION\***



**57%**

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

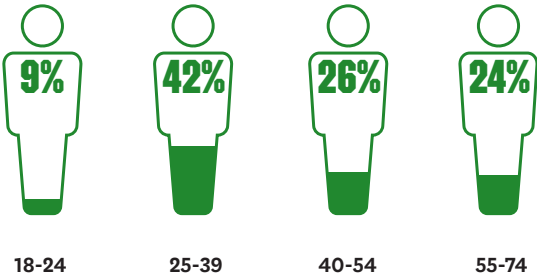


ACTIVE CONSIDERERS

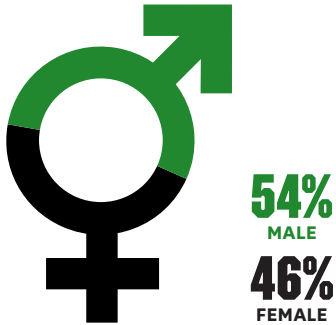


Active Considerers skew 25-39, are relatively spread through England, Scotland and Wales, and nearly 1 in 3 have a household income of over £60,000.

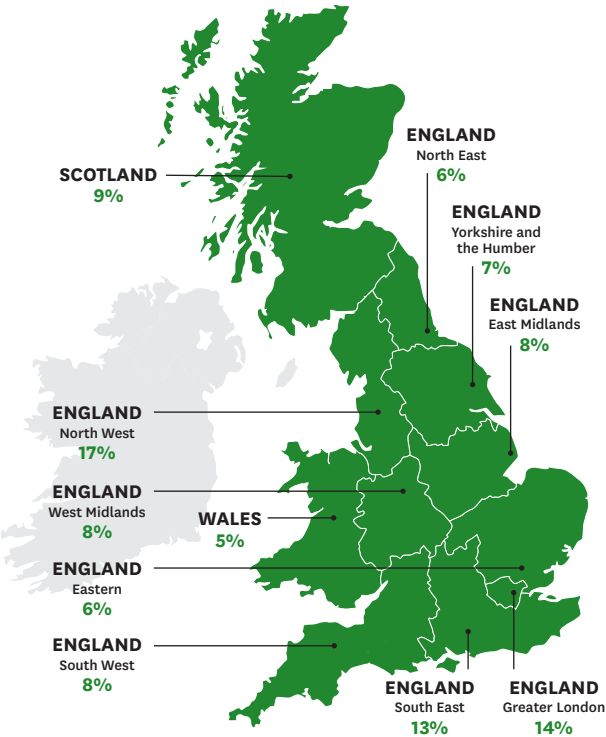
OVER 40% ACS ARE BETWEEN 25-39 YEARS



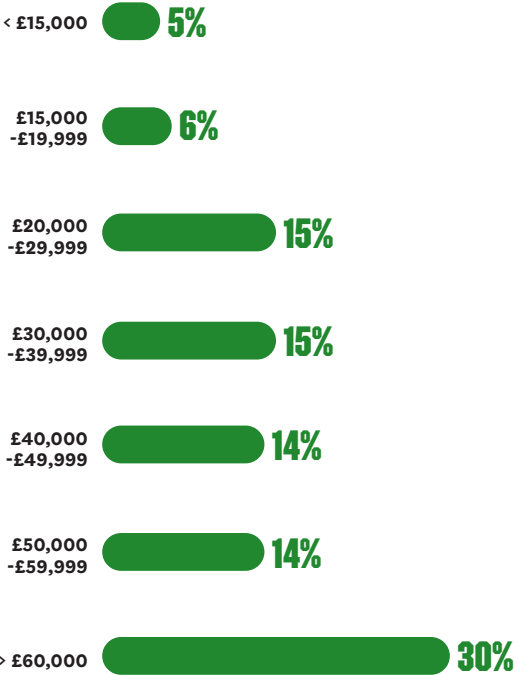
GENDER OF ACS



ACTIVE CONSIDERERS LIVE MAINLY IN NORTH WEST ENGLAND



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



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



Among UK Active Considerers, New Zealand is most associated with stunning landscapes, a pristine environment, safety, diverse outdoor and adventure offerings.

BRAND ASSOCIATIONS



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



**UK**  
ACTIVE CONSIDERERS



For potential visitors from the UK, New Zealand's beautiful landscapes, enjoyment and to learn and explore new things are key reasons to visit.

REASONS TO VISIT NEW ZEALAND



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



Active Considerers highly value the opportunity to taste local cuisine, explore towns, participate in nature activities, and experience historical and heritage sites.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



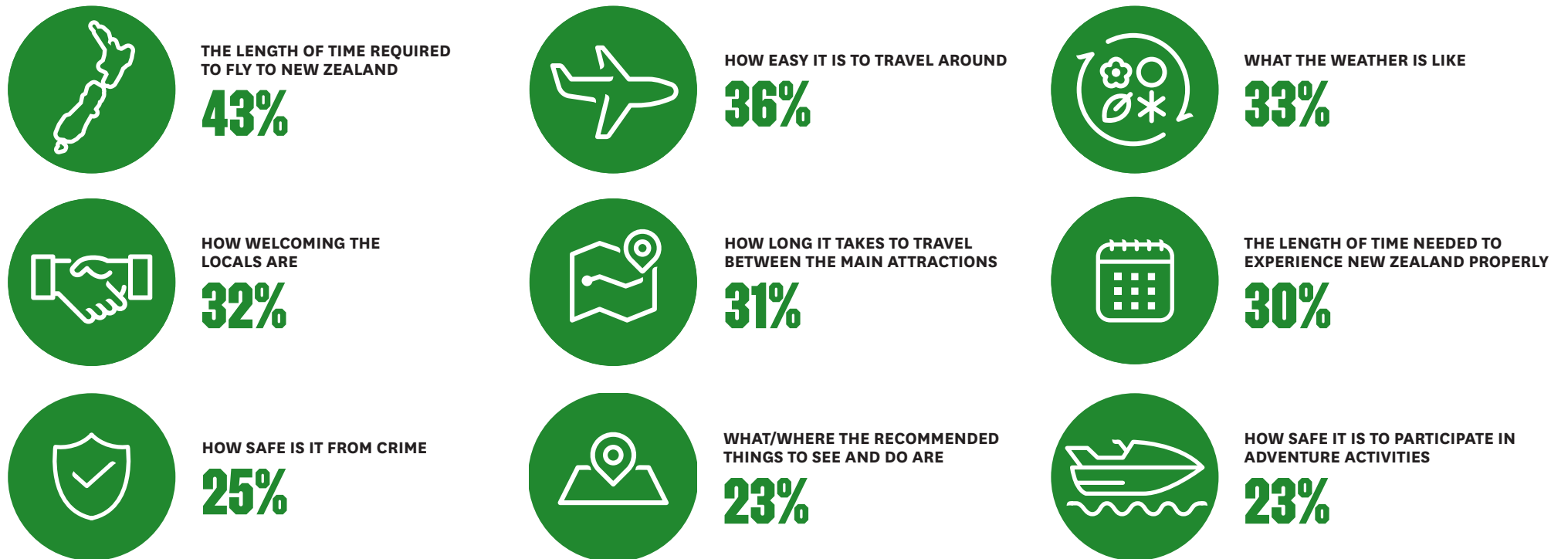
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Source: Active Considerer Monitor data 6-month period ending May 2024



Key concerns and knowledge gaps for prospective visitors include flight time to New Zealand, ease of travel on the ground, weather conditions, and how welcoming the locals are.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



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.

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NGĀ MIHI