



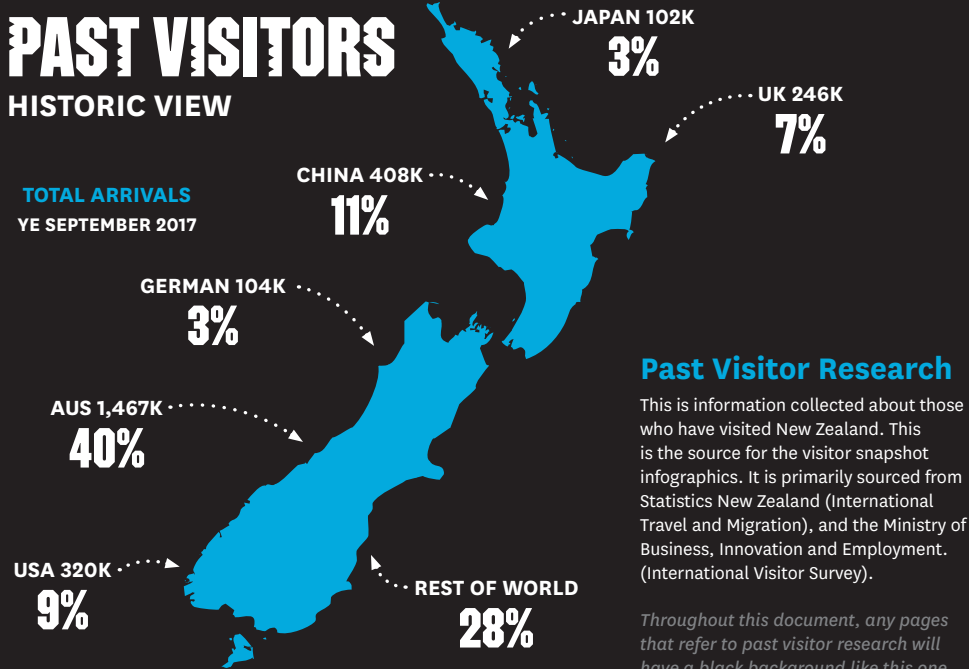
YOUTH

Market information about our
Visitors and our Active Considerers

PAST VISITORS

HISTORIC VIEW

TOTAL ARRIVALS
YE SEPTEMBER 2017



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.



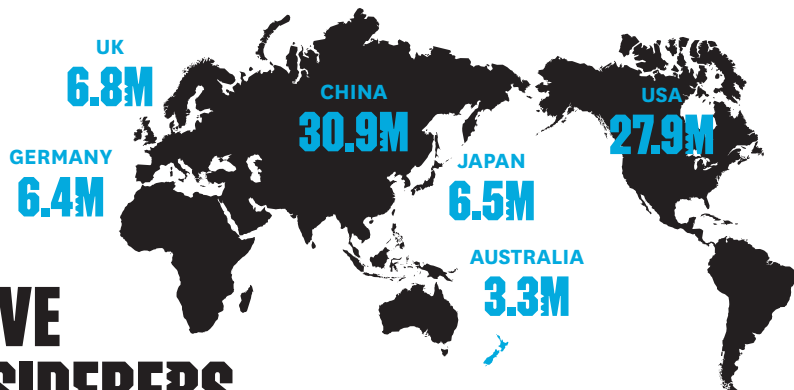
BACKPACKER

Backpackers (Youth in Germany and the UK) typically stay longer, do more activities, and visit more regions than our average holiday visitor.



ACTIVE CONSIDERERS

FUTURE VIEW



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.



PAST VISITORS

YOUTH HISTORIC DATA

Arrivals data from Statistics New Zealand allows us to measure the number of 18-24 holiday visitors to New Zealand as a proxy for the Backpacker sector. Behaviour of these visitors while in New Zealand is measured using MBIE's International Visitor Survey which uses a slightly wider 15-24 age range. This sector typically stay longer, do more activities, and visit more regions than our average holiday visitor, for these reasons TNZ have a specific focus on this youth 18-24 year old sector.

POTENTIAL FUTURE VISITOR

BACKPACKER RESEARCH

At Tourism New Zealand 'Backpackers' are defined as people aged 18-24, interested in an extended holiday that would include destinations in the Asia Pacific. Tourism New Zealand commission on-going research in the UK and Germany to better understand who these people are, and what their motivations and barriers to travel are. This research is the key information source for understanding our future Backpacker visitor.

YOUTH



BACKPACKER

191K

YOUTH 18-24 YEAR OLDS

10%

OF HOLIDAY ARRIVALS

65K

YOUTH HOLIDAY VISITORS WHO VISITED AUSTRALIA PRIOR TO NEW ZEALAND



OVER 600K BACKPACKERS VISITED AUSTRALIA

AVERAGE LENGTH OF STAY - YOUTH 18-24



YOUTH 18-24



AVERAGE HOLIDAY VISITOR



10% OF HOLIDAY ARRIVALS

ACCOUNTING FOR



19% OF HOLIDAY STAY DAYS

(5.4M HOLIDAY STAY DAYS)

AVERAGE SPEND DIFFERENCE - YOUTH 15-24



\$4K

VS. \$3.8K
ALL HOLIDAY VISITORS



10% OF HOLIDAY ARRIVALS

ACCOUNTING FOR



14% OF HOLIDAY SPEND

(\$940M HOLIDAY SPEND)

YOUTH

YOUTH VISITORS KEY MARKETS: GERMANY & UK

YOUTH 18-24



GERMANY

19K
VISITORS

83
DAYS

AVERAGE
LENGTH
OF STAY



UK

16K
VISITORS

41
DAYS

AVERAGE
LENGTH
OF STAY

AVERAGE SPEND
DIFFERENCE

\$5K

VS. \$3.8K
ALL HOLIDAY VISITORS

REGIONS VISITED

7.2

VS. 3.7
ALL HOLIDAY VISITORS

ACTIVITIES PARTAKEN

24

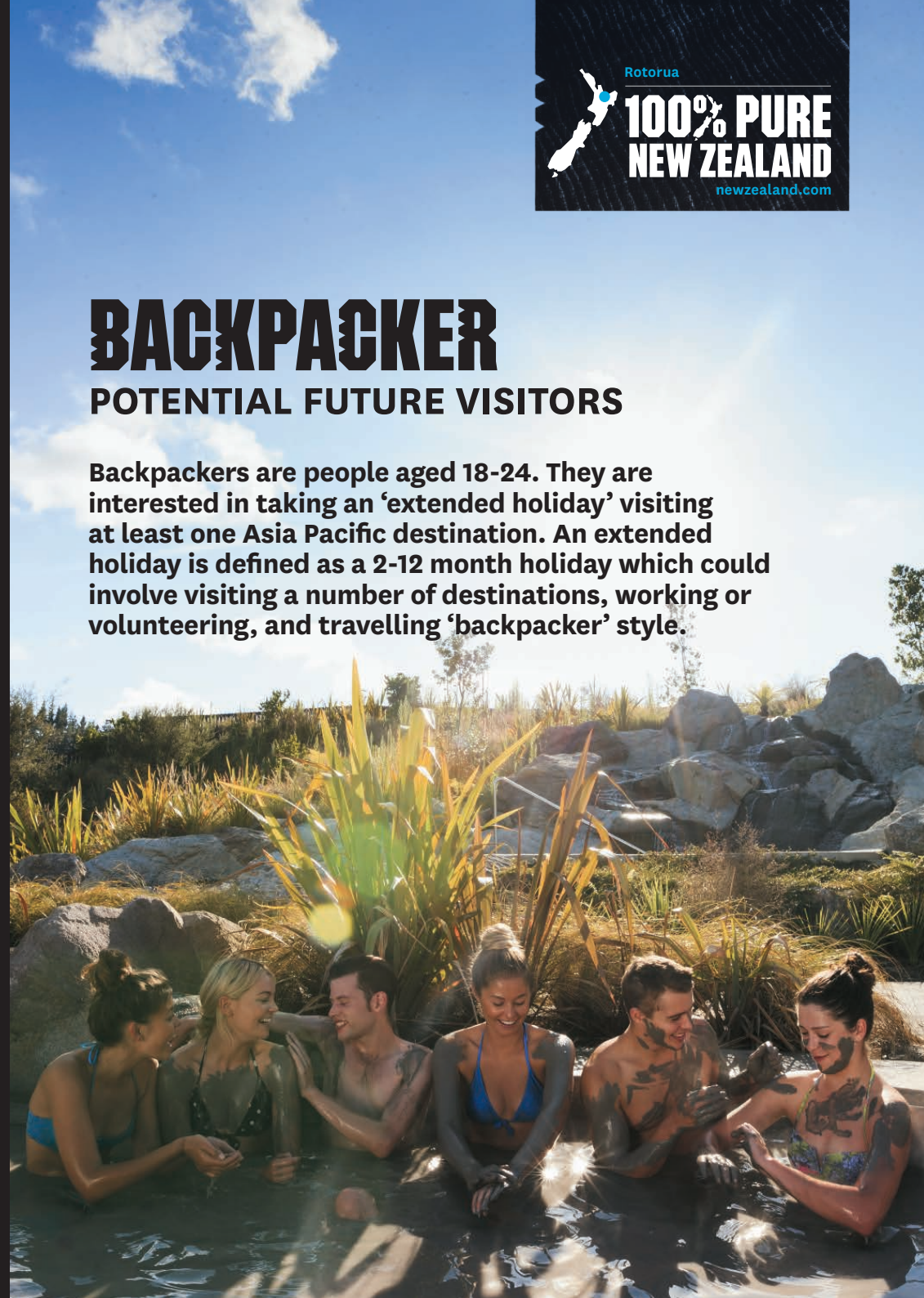
VS. 14
ALL HOLIDAY VISITORS

SOURCES: STATS NZ INTERNATIONAL TRAVEL AND MIGRATION YE DEC 2017 (HOLIDAY VISITORS), MBIE INTERNATIONAL VISITOR SURVEY YE DEC 2017 (HOLIDAY VISITORS), 3 YEARS ENDED DEC 2017 FOR GERMANY AND UK SPEND, REGION AND ACTIVITIES. *INFORMATION SOURCE FROM THE INTERNATIONAL VISITOR SURVEY (SPEND, REGIONS VISITED, ACTIVITIES) IS BASED ON A 15-24 AGE GROUP. INFORMATION FROM ARRIVALS DATA IS BASED ON A 18-24 AGE GROUP.



BACKPACKER POTENTIAL FUTURE VISITORS

Backpackers are people aged 18-24. They are interested in taking an 'extended holiday' visiting at least one Asia Pacific destination. An extended holiday is defined as a 2-12 month holiday which could involve visiting a number of destinations, working or volunteering, and travelling 'backpacker' style.



GERMANY

BACKPACKER PROFILE



German Potential Future Visitors = \$3.8m

OTHER DESTINATIONS GERMAN BACKPACKERS ARE INTERESTED IN INCLUDE



AUSTRALIA



USA



CANADA



JAPAN



SPAIN

THESE DESTINATIONS ARE OUR KEY COMPETITORS

GERMAN BACKPACKERS DREAMING ABOUT COMING TO NEW ZEALAND WANT TO KNOW MORE INFORMATION ABOUT

TRANSPORT
OPTIONS
36%

THINGS TO
SEE AND DO
43%

ACCOMMODATION
OPTIONS
59%

LOCAL
CULTURE
36%

HOW TO INTERPRET THIS DATA

59% of Backpackers dreaming about coming to New Zealand said they want to know more about accommodation options in New Zealand

WHAT DO GERMAN BACKPACKERS KNOW US FOR



Landscapes & scenery



Safe destination



Friendly people



Place to base yourself and chill out

MESSAGES WE NEED TO COMMUNICATE MORE



Fun & Enjoyment



Unique experiences

UK

BACKPACKER PROFILE



UK Backpacker Active Considerers = 2.7m

OTHER DESTINATIONS UK BACKPACKERS ARE INTERESTED IN INCLUDE



AUSTRALIA



USA



SPAIN



JAPAN



FRANCE

THESE DESTINATIONS ARE OUR KEY COMPETITORS

UK BACKPACKERS DREAMING ABOUT COMING TO NEW ZEALAND WANT TO KNOW MORE INFORMATION ABOUT

TRANSPORT
OPTIONS
36%

THINGS TO
SEE AND DO
38%

ACCOMMODATION
OPTIONS
48%

HOW LONG
IT TAKES TO
TRAVEL BETWEEN
ATTRACTIONS
& LOCATIONS
32%

HOW TO INTERPRET THIS DATA

48% of Backpackers dreaming about coming to New Zealand said they want to know more about accommodation options in New Zealand

WHAT DO UK BACKPACKERS KNOW US FOR



Landscapes & scenery



Safe destination

MESSAGES WE NEED TO COMMUNICATE MORE



Fun & Enjoyment



Easy to travel around



Range of experiences

100% PURE
NEW ZEALAND
newzealand.com