

CHINA

These packs provide a brief snapshot of our core visitor markets prior to the interruption of international travel due to Covid-19.

Nugget Point, Catlins



**100% PURE
NEW ZEALAND**

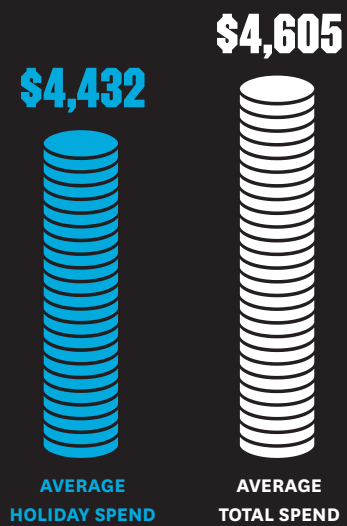
CHINA

VISITOR SNAPSHOT



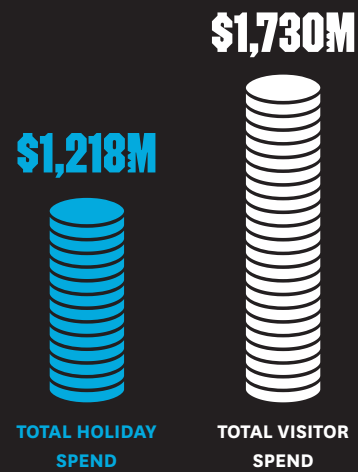
Pre-Covid, China was New Zealand's 2nd largest market by arrivals, comprising 11% of total arrivals. Chinese visitors spent \$1.7b in the past year - 15% of all visitor spend. Of which, \$333m was spent in the regions.

AVERAGE SPEND PER VISITOR

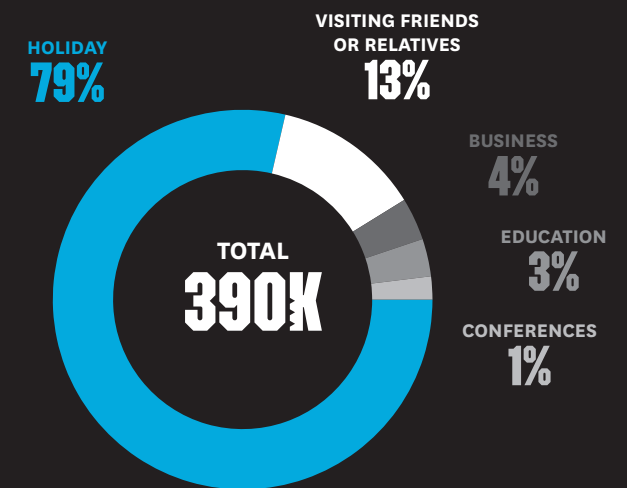


Chinese holiday visitors have a high spend per day of NZ\$476

TOTAL MARKET CONTRIBUTION SPEND



PURPOSE OF VISIT



Regions refer to RTOs excluding those home to the larger international airports: AKL, WLG, CHC, and ZQN

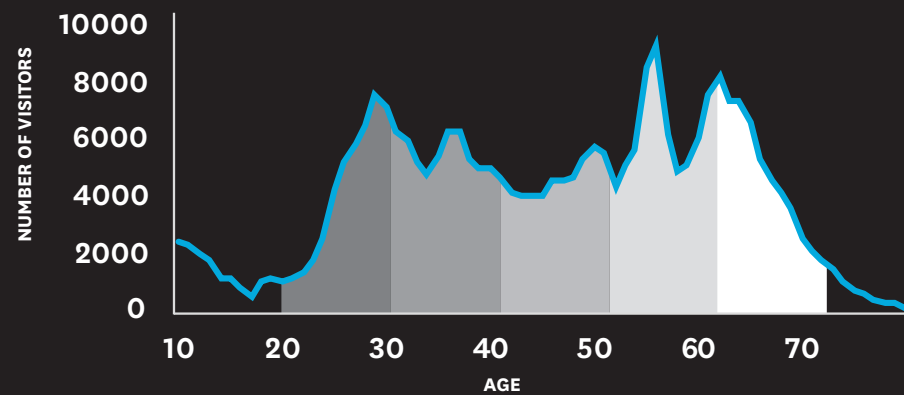
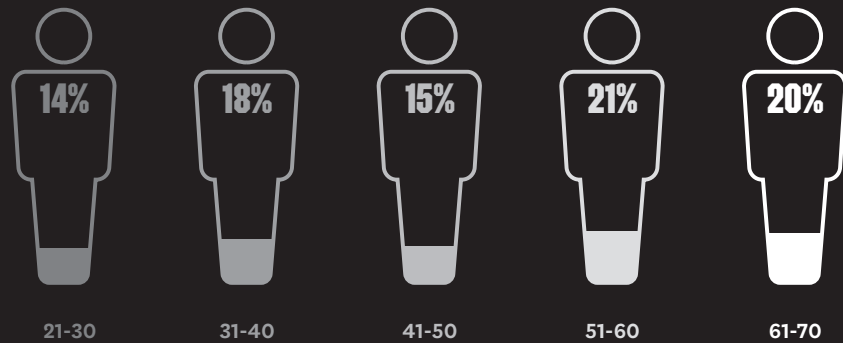


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VISITOR SNAPSHOT

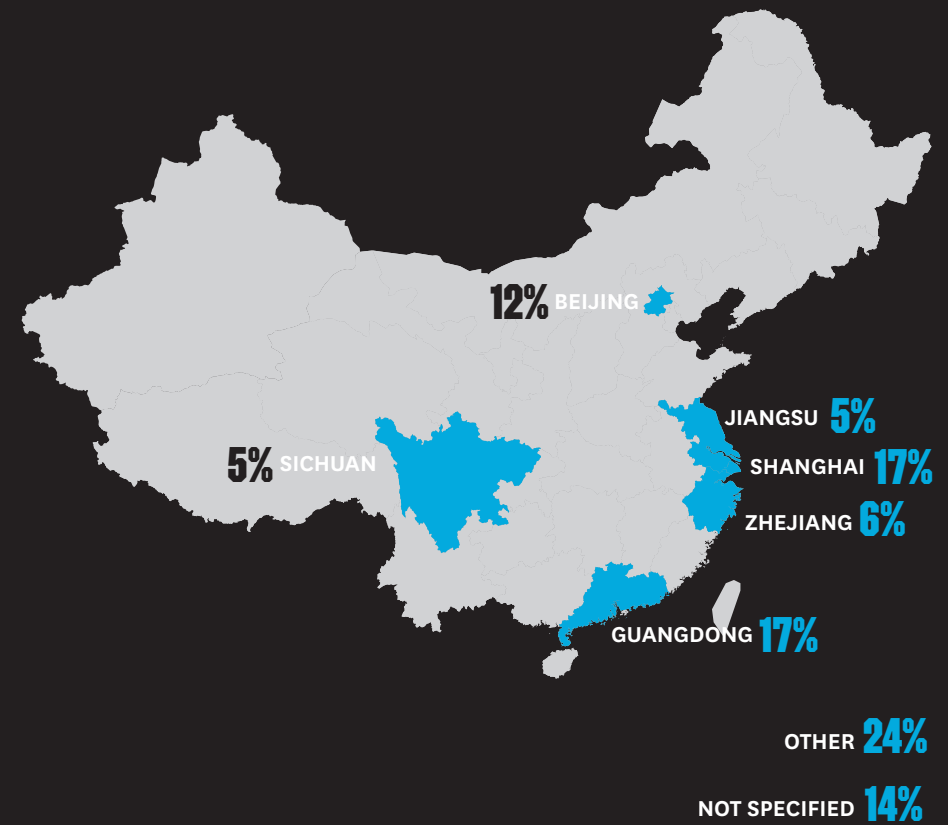
Holiday arrivals from China are reasonably balanced across ages

AGE PROFILE OF HOLIDAY VISITORS



The highest proportion of Chinese holiday visitors come from Tier 1 cities

HOLIDAY ARRIVALS BY REGION



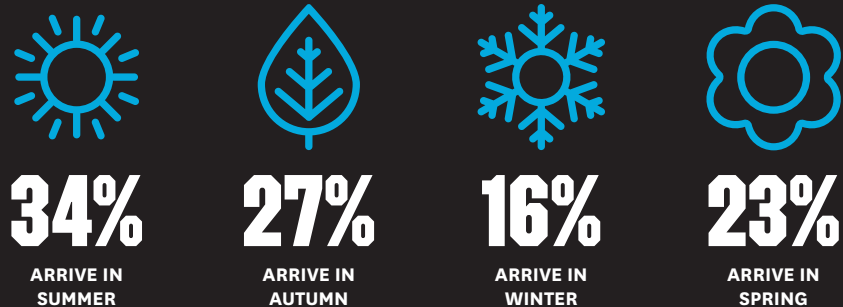
Source: Based on YE Jan Arrivals. Age demographic is determined based on their age at time of travel

CHINA

VISITOR ACTIVITIES

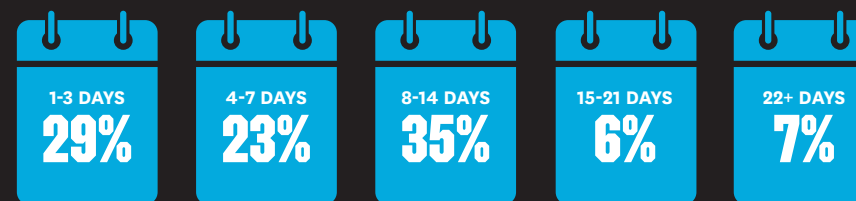


Chinese holiday arrivals are slightly skewed towards a summer holiday



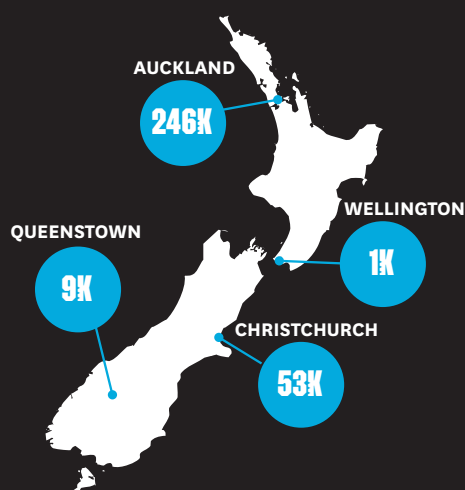
Chinese visitors tend to visit for 1-2 weeks

LENGTH OF STAY (DAYS)



TOP TRAVEL ROUTES

ROUTE	% OF ARRIVALS
SHANGHAI > AUCKLAND	19%
GUANGZHOU > AUCKLAND	9%
MELBOURNE > AUCKLAND	9%
GUANGZHOU > CHRISTCHURCH	9%
BRISBANE > AUCKLAND	8%



Popular Activities



CHINA

ACTIVE CONSIDERER PROFILE



Active Considerers (ACs) are what we call our target audience. These people are aged 18-74, and have New Zealand as a preferred holiday destination in the next three years. They also indicate that they are prepared to spend ¥10,000 per person on their holiday.

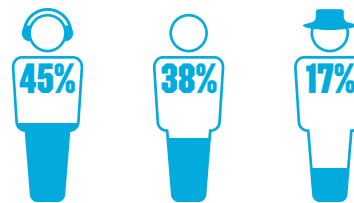
TOTAL ACTIVE CONSIDERERS

35.8M

APPROXIMATE NUMBER OF ACTIVE CONSIDERERS IN CHINA (DEC 2019)



AGE SEGMENT OF ACTIVE CONSIDERERS

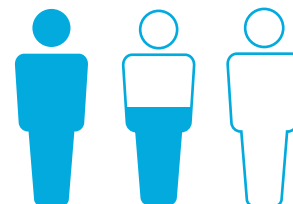
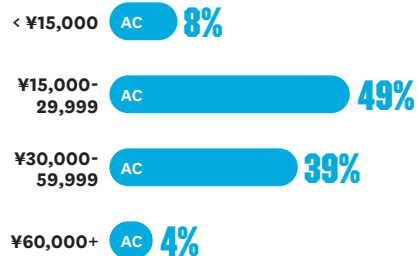


21-30 31-40 41-50

TERTIARY EDUCATION OF ACS (BACHELOR'S DEGREE OR HIGHER)



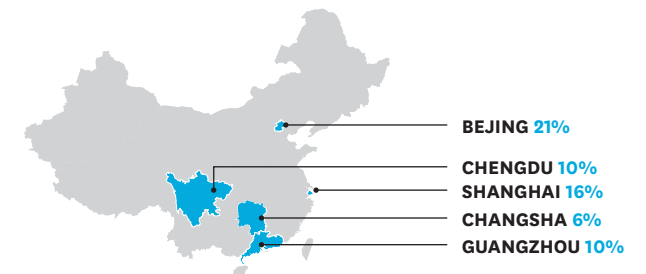
ACS MONTHLY HOUSEHOLD INCOME



NEARLY 1/2 ACS IN CHINA ARE BETWEEN

21-30

REGIONAL SPREAD OF ACS



Active considerer data is from the 6 month period ending April 2020

CHINA

ACTIVE CONSIDERER METRICS



Appeal of and preference for NZ as a holiday destination have remained high during the Covid-19 pandemic.



76%

ONLINE AUDIENCE 18-74 FIND
NEW ZEALAND APPEALING AS
A DESTINATION



64%

OF ONLINE AUDIENCE 18-74 ARE
ACTIVE CONSIDERERS



81%

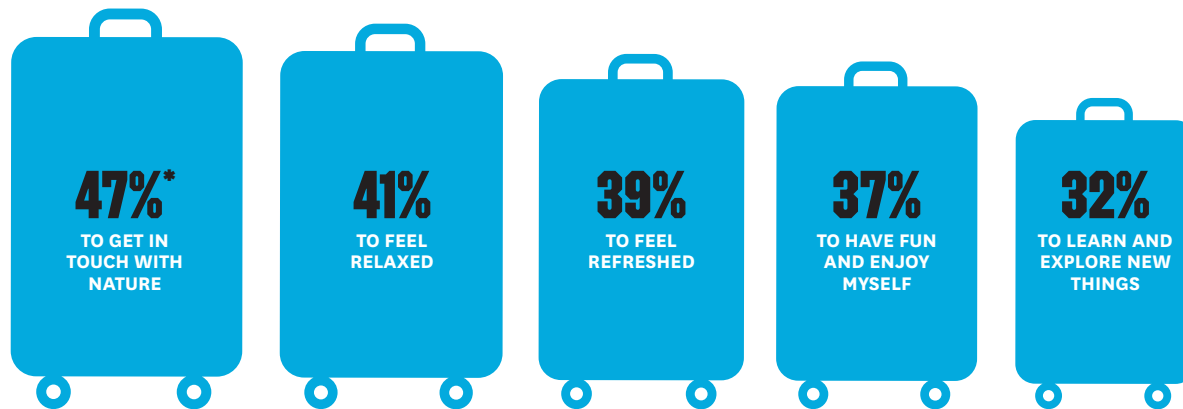
ACTIVE CONSIDERERS RANK
NEW ZEALAND #1 OR #2 AS A
PREFERRED DESTINATION

CHINA

ACTIVE CONSIDERER MINDSET

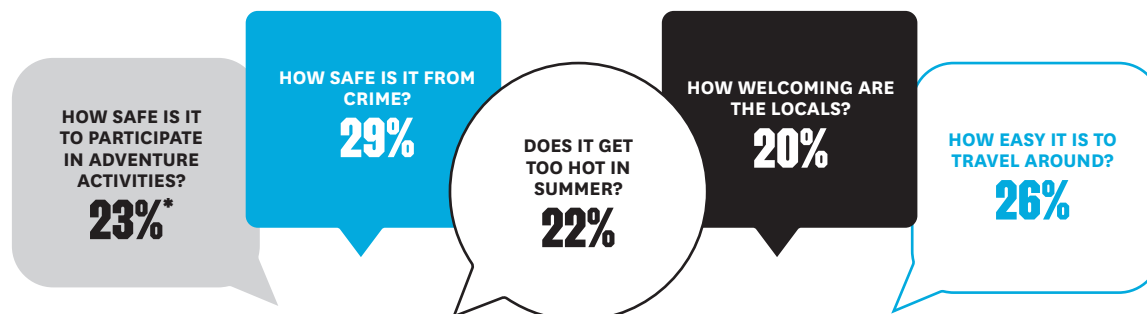


WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?



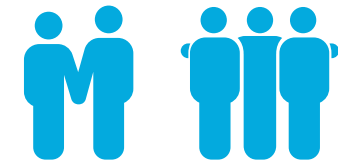
*the 41-50 age group are the most interested in getting in touch with nature (66%)

WHAT DO THEY NEED MORE INFORMATION ABOUT?

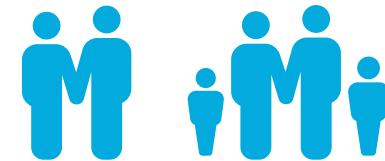


*31-40 age group are the most concerned about activity safety (30%)

WHO ARE THEY MOST INTERESTED IN TAKING TRIPS WITH?

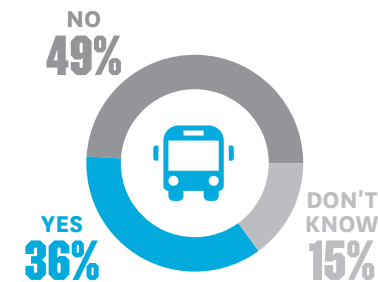


21-30 year old Active Considerers are interested in trips with their partner or group of friends.



31-50 year old Active Considerers are interested in trips with their partner or as a family with their children.

DO THEY PLAN ON TRAVELLING IN AN ORGANISED TOUR?



Nearly 1/3 ACs from China plan to travel in an organized tour group.

1/3
OF ACS FROM CHINA PLAN TO TRAVEL IN AN ORGANIZED TOUR

42%
OF 31-40 YEAR OLDS PLAN TO TRAVEL IN AN ORGANISED TOUR

CHINA

WHILE BORDERS ARE CLOSED, WE ARE SEEING PENT UP DEMAND TO TRAVEL TO NEW ZEALAND WHEN IT BECOMES POSSIBLE



WHO IS LIKELY TO BOOK A TRIP IN THE NEXT THREE MONTHS?²



Younger – 41% are under 34 years old

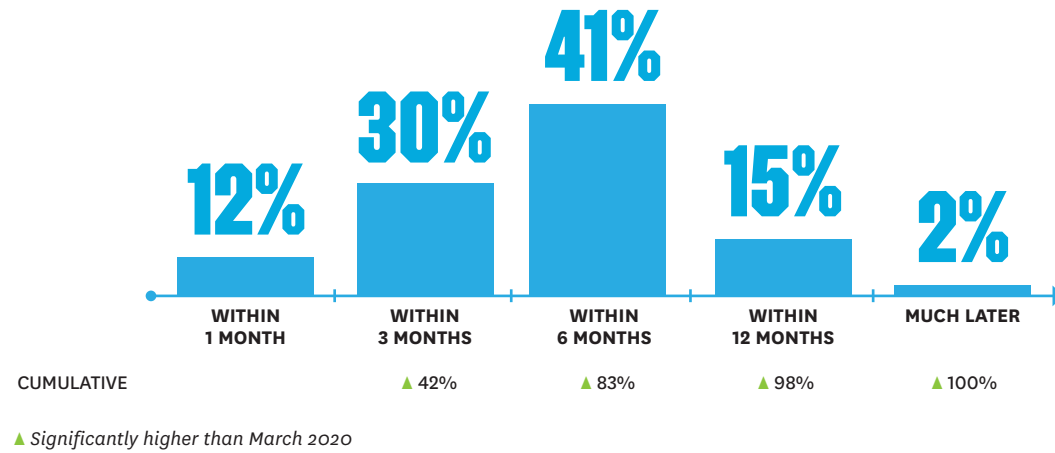


More likely to be single



From Tier-1 cities

SPEED OF NEW ZEALAND HOLIDAY DEMAND RECOVERY AFTER RESTRICTIONS ARE LIFTED¹



1. Active considerer monitor, TNZ, April 2020

2. Covid-19 Travel Sentiment Survey, McKinsey & Company, April 2020