



ADVENTURE TOURISM

MAY 2013

*Produced by Tourism New Zealand, Insights – May 2013
Key contacts: Bevan Wait & Sarah Harman*

Key Findings

1 in 2 international holiday tourists did some sort of adventure tourism during their stay in New Zealand.

1 in 3 international holiday tourists did some sort of extreme adventure tourism during their stay in New Zealand.

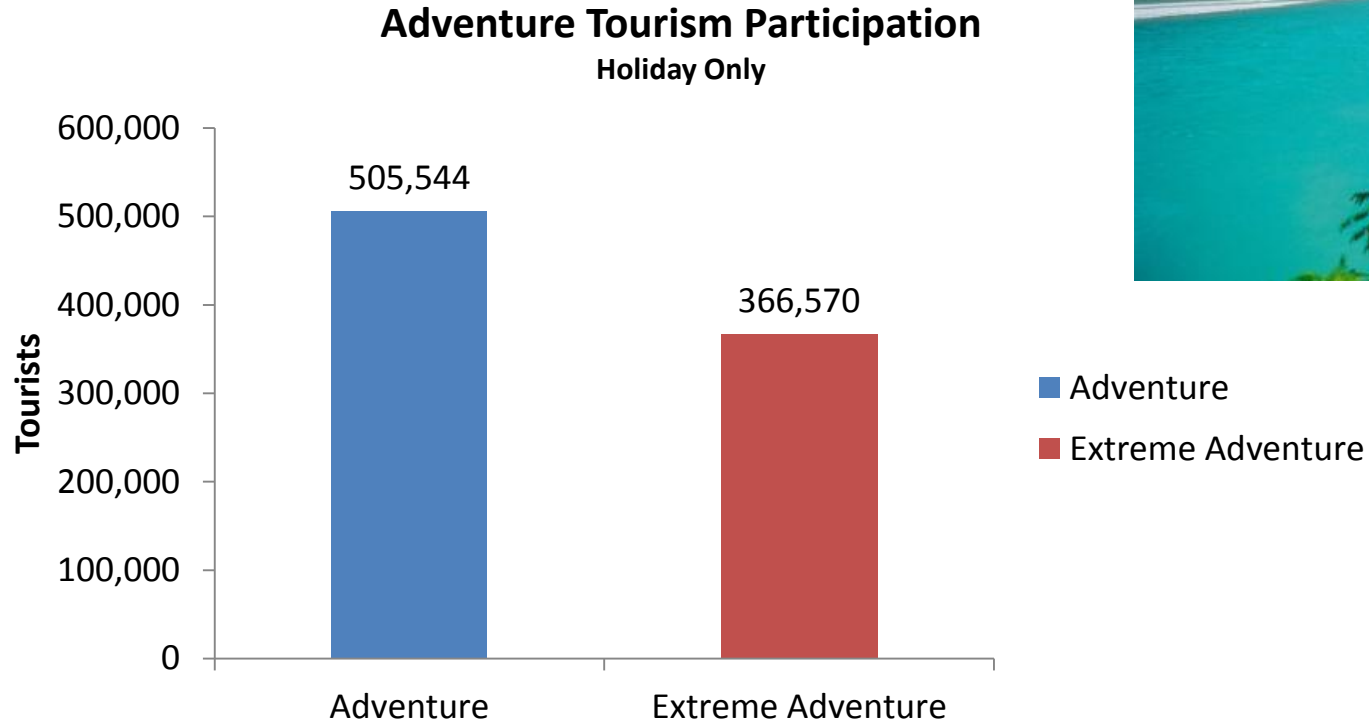
Tourists that did adventure tourism while in NZ spent a total of \$1.6 billion in New Zealand. This is equivalent to 60 per cent of all holiday related tourism expenditure.

The Netherlands and Germany are the two countries most likely to do adventure tourism while in NZ.

Jet boating, glacier walks and the luge are the most popular adventure tourism activities undertaken by international tourists.



Volumes



In 2012 over 500,000 international holiday tourists participated in some form of adventure tourism during their stay in New Zealand. This represents 51 per cent of New Zealand's holiday market.

367,000 international holiday tourists participated in extreme adventure tourism during their stay in New Zealand. This is equivalent to 37 per cent of holiday tourists.

Tourism Expenditure

\$1.6 billion

In 2012, holiday tourists that did adventure tourism activities in New Zealand spent \$1.6 billion during their stay in New Zealand

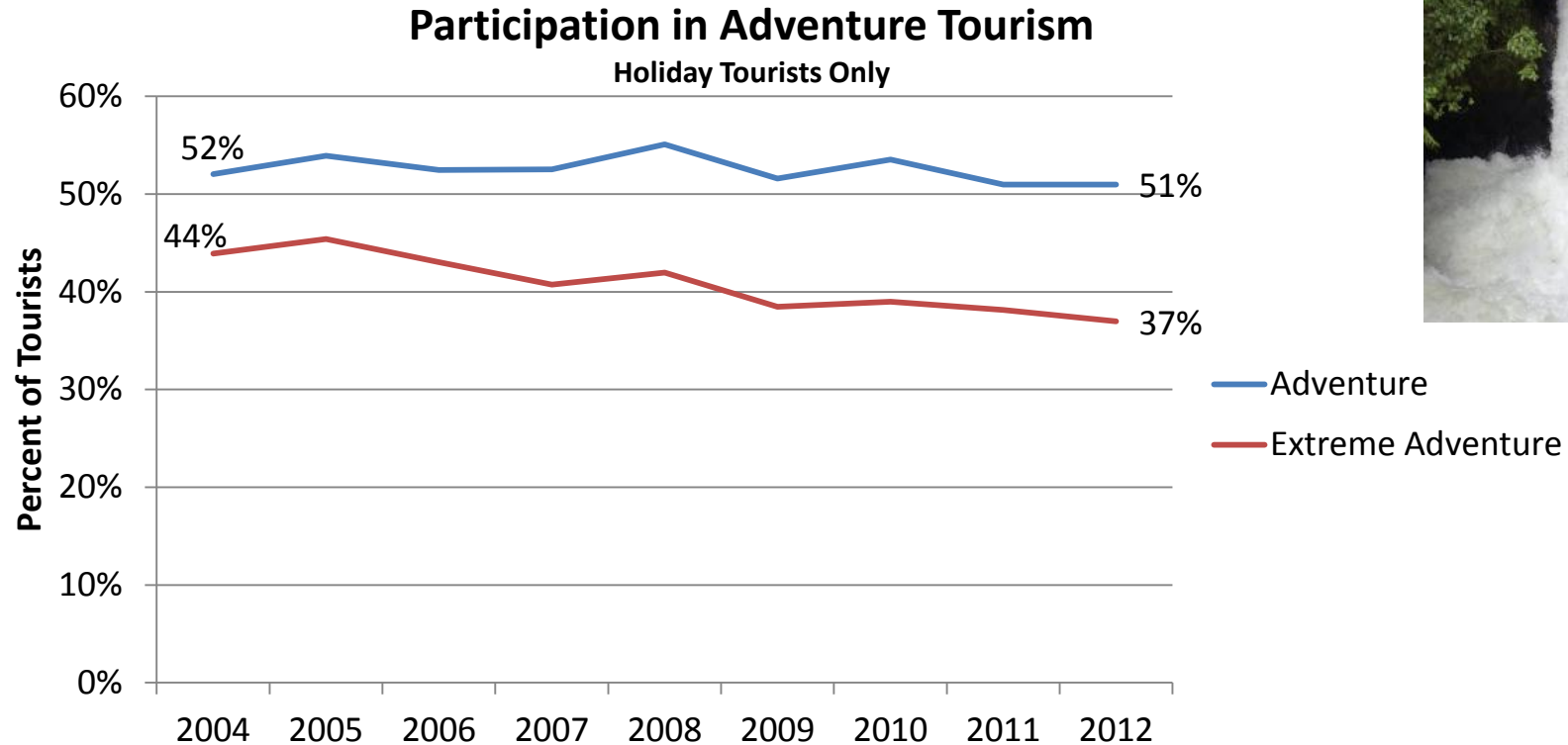
This is equivalent to **60%** of holiday related tourism expenditure

International holiday tourists that do adventure tourism activities in New Zealand spend **\$3,200** each per person

Note: this expenditure is not just on adventure tourism activities. It includes all expenditure made by tourists that did adventure tourism activities within New Zealand eg accommodation, food, beverage, transport, other activities etc.



Participation in Adventure Tourism

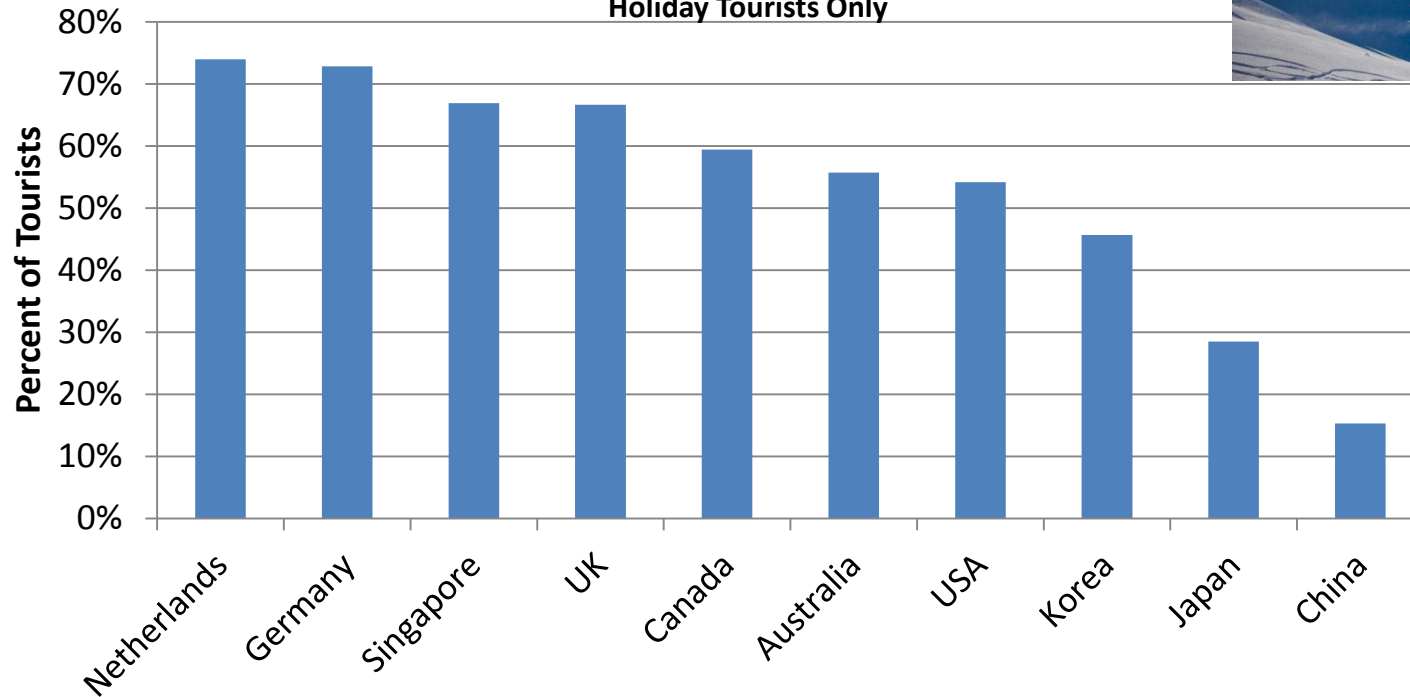


Participation in adventure tourism has remained relatively constant over the last decade. Participation in extreme adventure tourism has however seen a decreasing trend.

Participation by Market



Participation in Adventure Tourism
Holiday Tourists Only



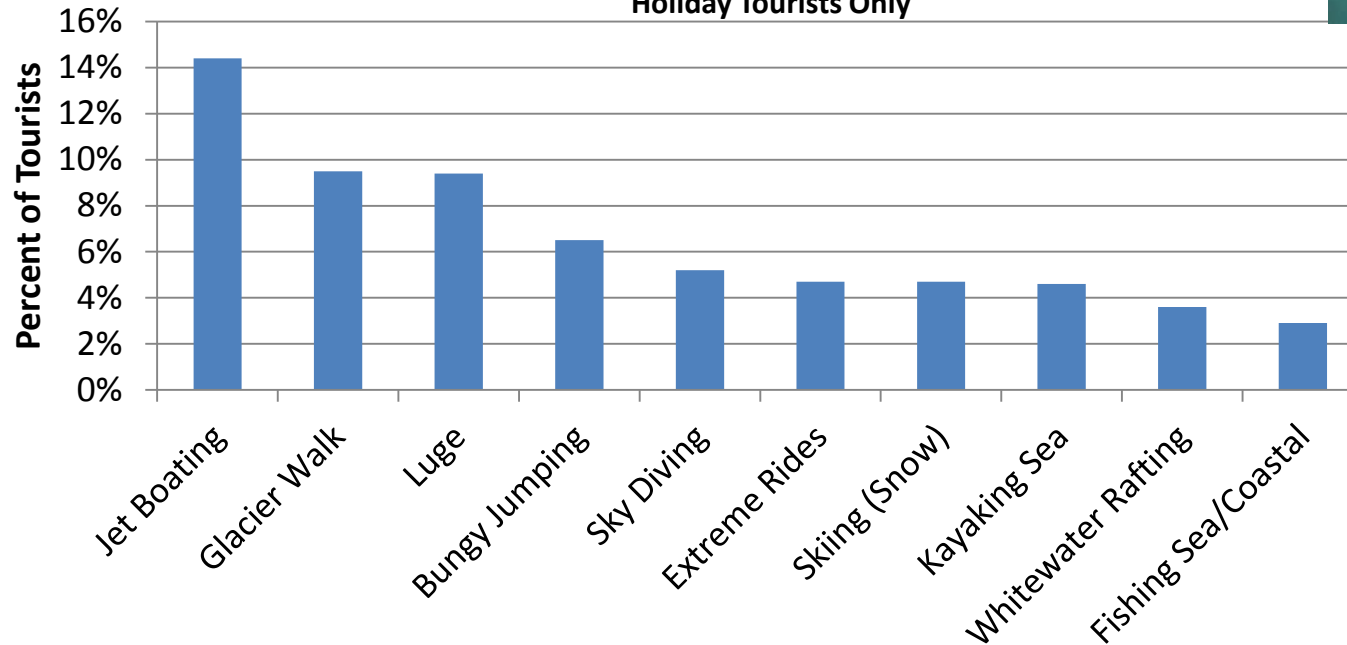
From New Zealand's top ten holiday markets Dutch, German, Singaporean, UK and Canadian tourists are the most likely to participate in adventure tourism activities while in New Zealand.

New Zealand's key Asian markets of Korea, Japan and China are the least likely to participate in Adventure tourism. Only 15 per cent of Chinese tourists do some form of adventure tourism while in New Zealand.

Top Adventure Activities



Participation in Adventure Tourism Activities – Top 10
Holiday Tourists Only

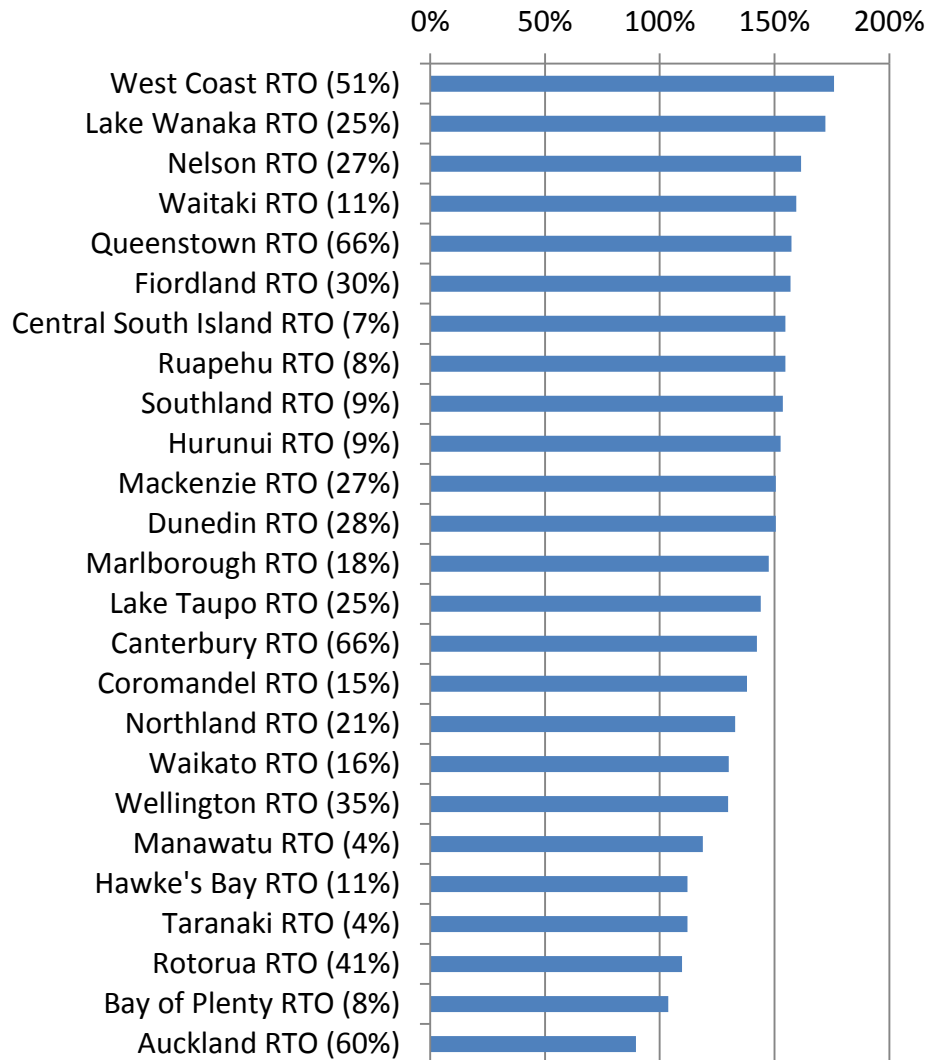


Jet boating, glacier walking, luge, bungee jumping and sky diving are the most popular adventure tourism activities for international holiday tourists.

Jet boating is the most popular activity (over 14 per cent of intl holiday tourists) due to its appeal to a wide demographic range.

Popular Regions for Adventure Tourism

Regions Visited - Index



Regions that over index in terms of visitation for international holiday tourists that do adventure tourism are:

- The West Coast
- Lake Wanaka
- Nelson
- Waitaki
- Queenstown
- Fiordland
- Central South Island
- Ruapehu

On a volume basis the regions most visited by adventure tourism tourists are:

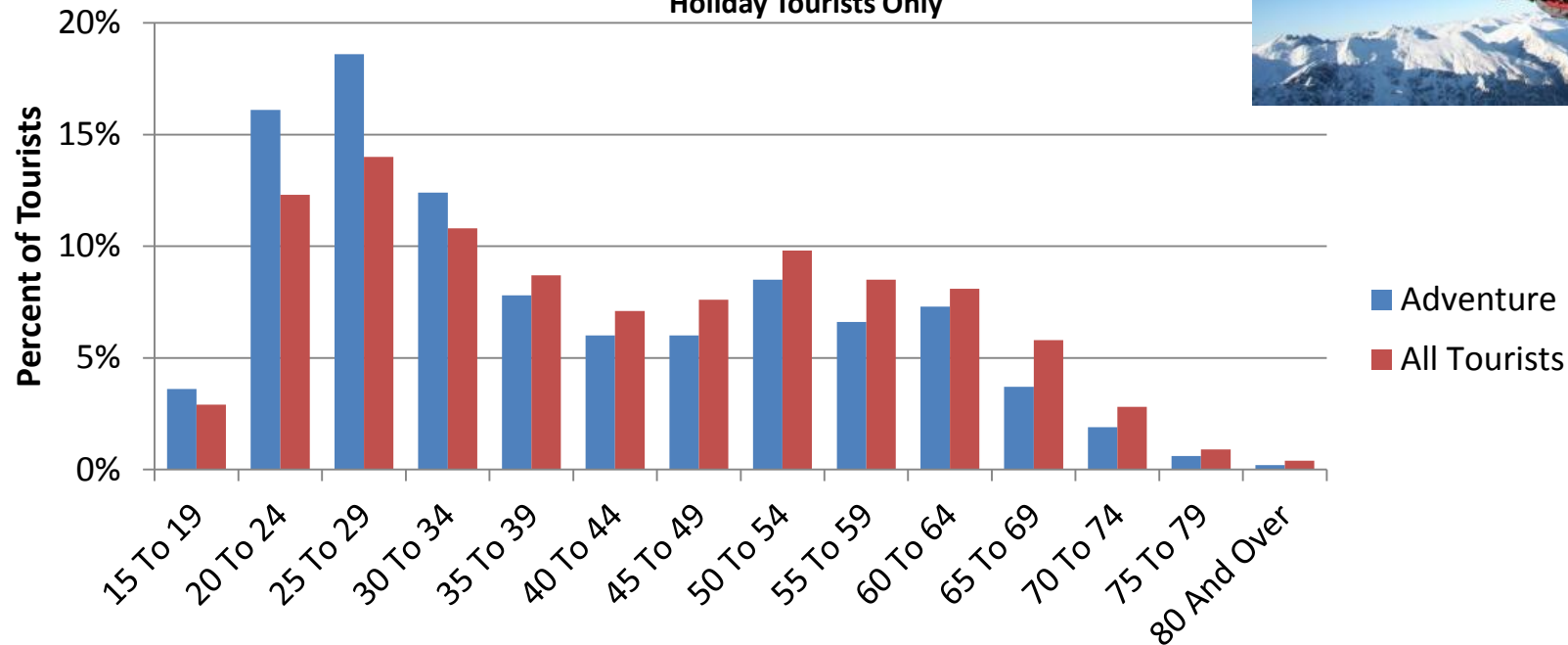
- Canterbury
- Queenstown
- Auckland
- West Coast
- Rotorua
- Wellington
- Fiordland

Note: volumes are shown on the Y axis titles

Participation by Age



Participation in Adventure Tourism
Holiday Tourists Only



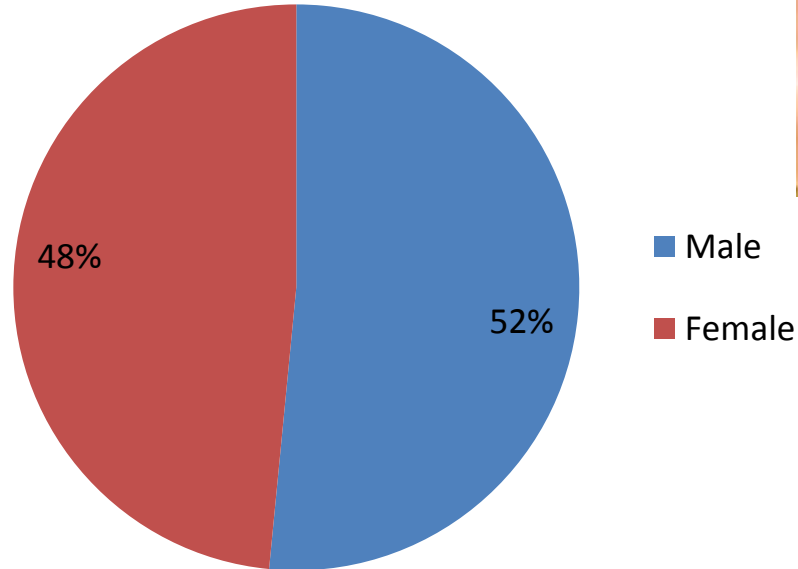
Unsurprisingly youth are more likely to participate in adventure tourism activities. The most likely age group to undertake adventure tourism during their stay in New Zealand are 20 to 29 year olds.

Middle aged and older tourists still participate in adventure tourism, it is simply they are slightly less likely to do adventure tourism activities during their stay in NZ.

The older tourists get the less likely they are to be interested in participating in adventure tourism.

Gender

Gender of Adventure Tourists
Holiday Tourists Only

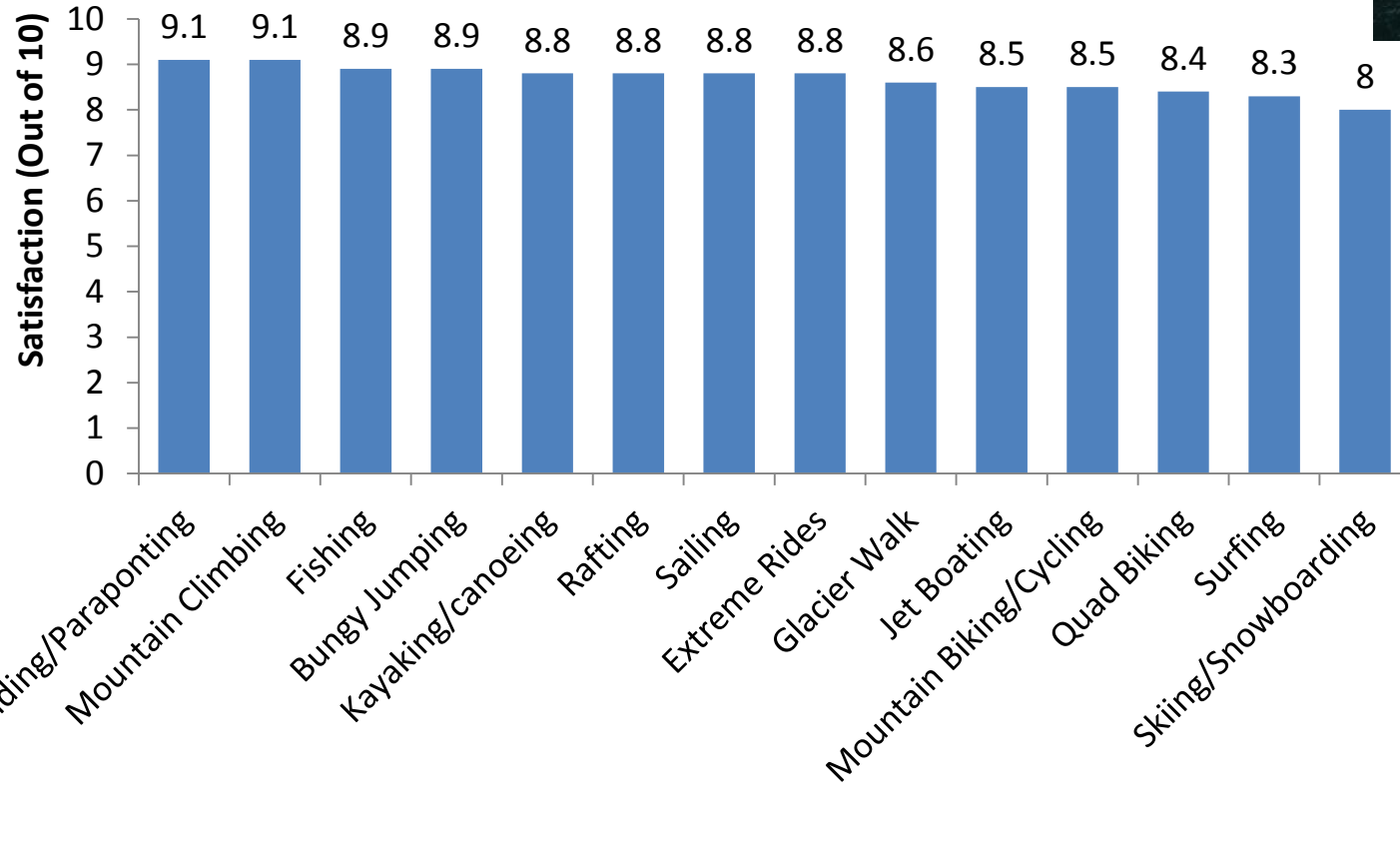


Adventure tourism is done by both males and females during their stay in NZ, and is not a gender specific genre.

Satisfaction



Satisfaction



Satisfaction with adventure tourism activities is high. The lowest scoring adventure tourism product based on satisfaction is skiing and snowboarding where expense seems to drive satisfaction down.

Source: MBIE; International Visitor Survey, 2010 to 2012

NEWZEALAND.COM

The screenshot shows the homepage of the New Zealand Tourism website. At the top, the text "100% PURE NEW ZEALAND" is displayed in white on a dark background. To the right of this text are navigation links: "Australia" with a dropdown arrow, "Sign in" and "Sign up" in blue, and a "Trip Planner" icon. A search bar with a magnifying glass icon is also present. Below the navigation bar is a horizontal menu with links: "Destinations", "Things to do", "Facts about New Zealand", "Getting here", "Getting around", and "Accommodation". The main content area features a large, dark image of two people exploring a cave with headlamps. The text "Find creatures that dwell in ancient caves" is overlaid on the left side of the image. Several callout boxes are present: "Adventure" near the top right, "Waitomo Caves" near the center, and "Hamilton - Waikato" near the bottom left. At the bottom of the image, the text "Kia Ora Welcome to New Zealand" is displayed, followed by a "Like" button and a counter showing "823k".

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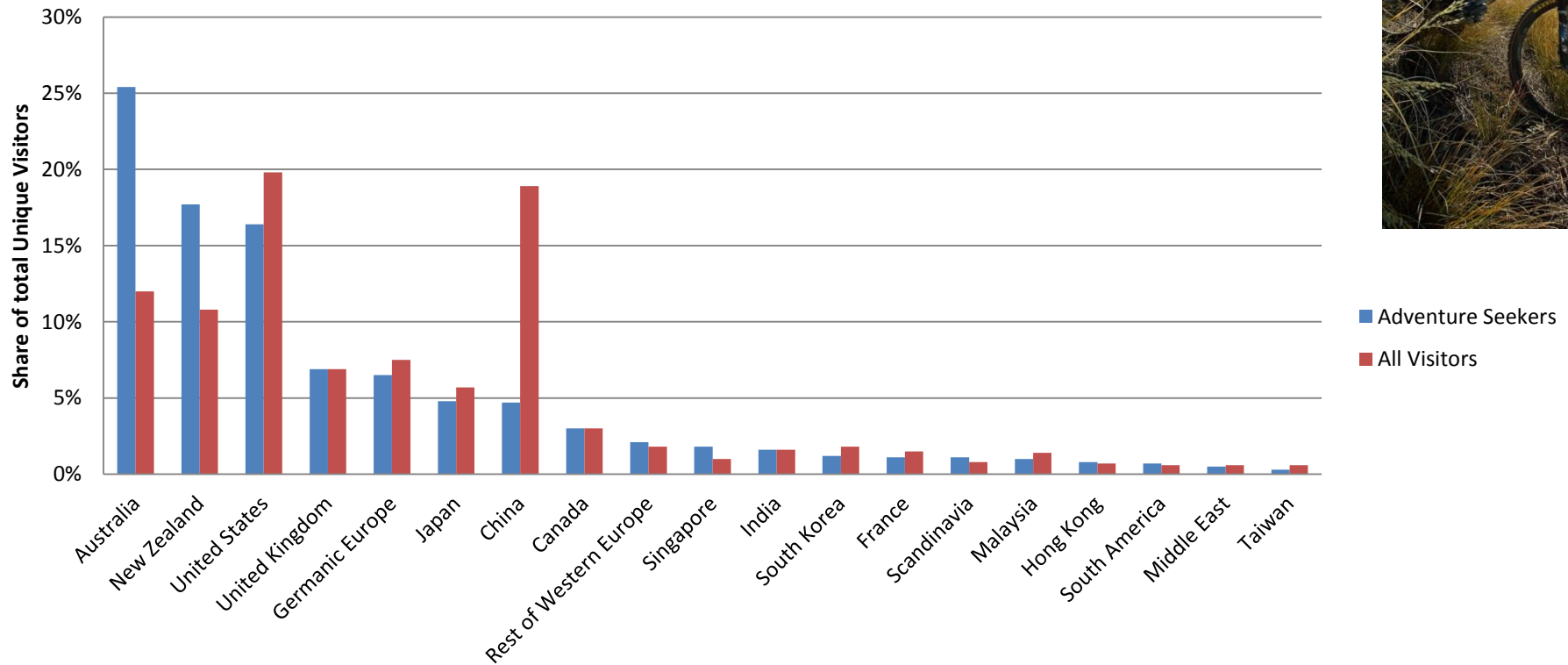


Adventure seekers on newzealand.com

- In the 12 months to April 2013:
 - 30% of visitors to the site consumed adventure content (~3.6m unique visitors)
 - 11% consumed extreme adventure content (~1.3m unique visitors)
 - 9% of business listing referrals went to adventure operators (72,000 referrals)
- Consume North Island and South Island content equally
 - Top 5 regions: Auckland, Queenstown, Christchurch-Canterbury, Rotorua, West Coast
 - The West Coast significantly over-indexes as a region of interest for adventure seekers on newzealand.com
- Adventure seekers behave much like any other visitor in terms of accommodation preferences
- Adventure seekers are more likely than the average visitor to visit the site from within Australia or New Zealand

Traffic by Market

Adventure Seekers' Traffic to newzealand.com by market

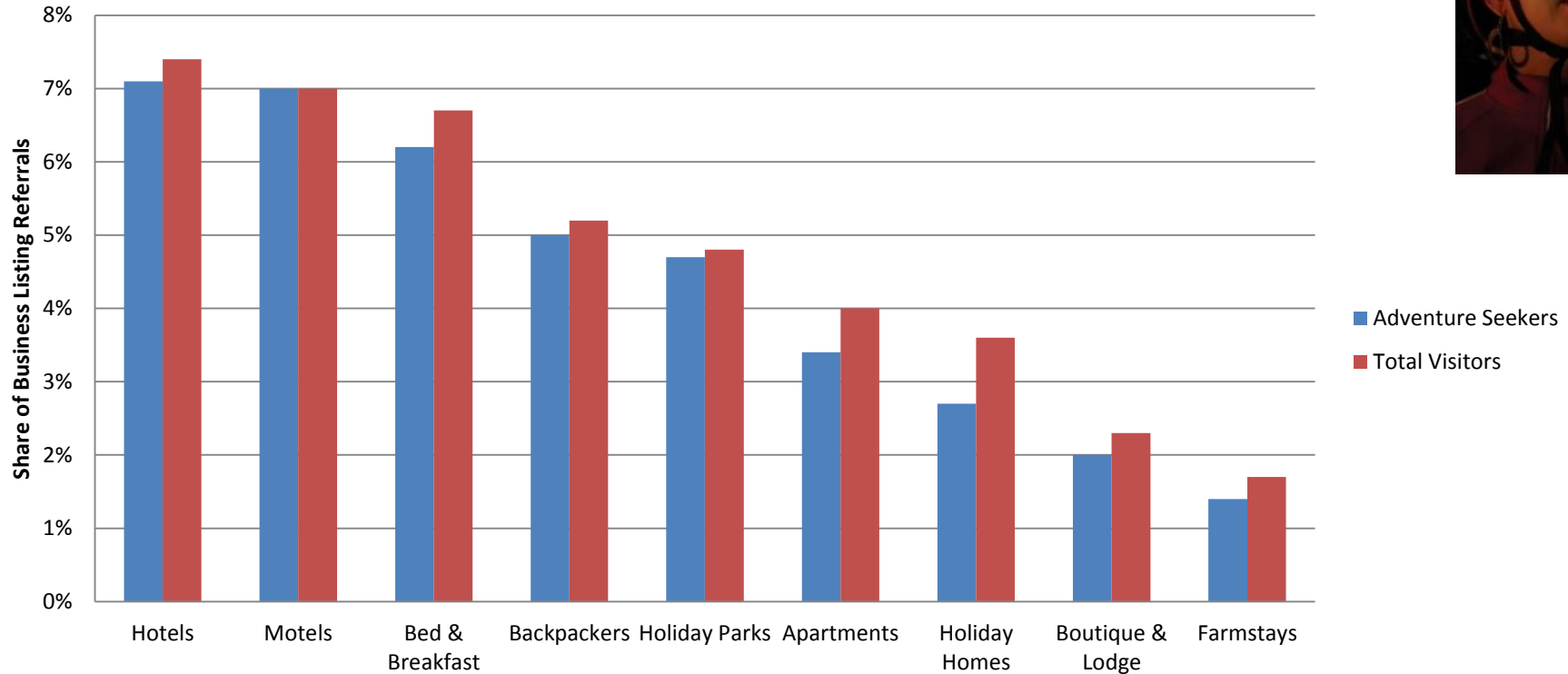


Adventure seekers are more likely to be in Australia and New Zealand

Note: Chinese visitors are far less likely to view any content other than campaign pages, which affects their likelihood to enter the 'adventure seekers' segment.

Accommodation Searches

Top Accommodation Types for Adventure Seekers on newzealand.com



Adventure seekers seek the same accommodation types as everyone else

A scenic landscape at dusk or dawn. In the foreground, a suspension bridge with a covered walkway extends from the right side of the frame. The bridge has a metal truss structure and is supported by cables. Below the bridge, a calm lake reflects the sky and the surrounding landscape. In the middle ground, there are several small, forested islands in the lake. The background features a range of mountains with snow-capped peaks, illuminated by a soft, warm light from the setting or rising sun. The sky is a deep blue, transitioning to a lighter hue near the horizon. The overall mood is serene and majestic.

CONCLUSION

Conclusion

Over half of our international holiday tourists undertake some sort of Adventure tourism while in New Zealand. Adventure tourism is undertaken by young and old, male and female and is popular in most markets. Adventure tourism is a mainstream New Zealand product that helps to generate a significant proportion of New Zealand's tourism related expenditure.

It is recommended adventure tourism is well represented in New Zealand's marketing – particularly in Australian and Western markets.



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DEFINITIONS

Adventure Tourism Definition

For this research outdoor adventure tourists are defined as anyone that did these activities while in New Zealand:

- | | |
|---------------------|------------------------|
| Abseiling | Mountain Climbing |
| Ballooning | Parachuting |
| Bungy Jumping | Paraponting |
| Canoeing | Blackwater Rafting |
| Caving | Whitewater Rafting |
| Extreme Rides | Sailing |
| Fishing | Scuba Diving/Snorkling |
| Glacier Walk | Skiing |
| Heliboarding/Skiing | Snowboarding |
| Jet Boating | Rock Climbing |
| Kayaking | Surfing |
| Luge | Water Skiing |
| Mountain Biking | |



Developed in conjunction with TIA. Note this list is purely for research purposes and is not a formal definition or exhaustive list.

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Extreme Adventure Definition

For this research extreme adventure tourists are defined as anyone
That did these activities while in New Zealand:

Abseiling	Mountain Climbing
Bungy Jumping	Parachuting
Canoeing	Paraponting
Caving	Blackwater Rafting
Extreme Rides	Whitewater Rafting
Glacier Walking	Scuba Diving/Snorkling
Heliboarding/Skiing	Snowboarding
Jet Boating	Rock Climbing
Kayaking	Surfing
Luge	Water Skiing
Mountain Biking	4wd Sports

Developed using Support Adventure adventure tourism definitions



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