

# UNITED STATES OF AMERICA

## 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

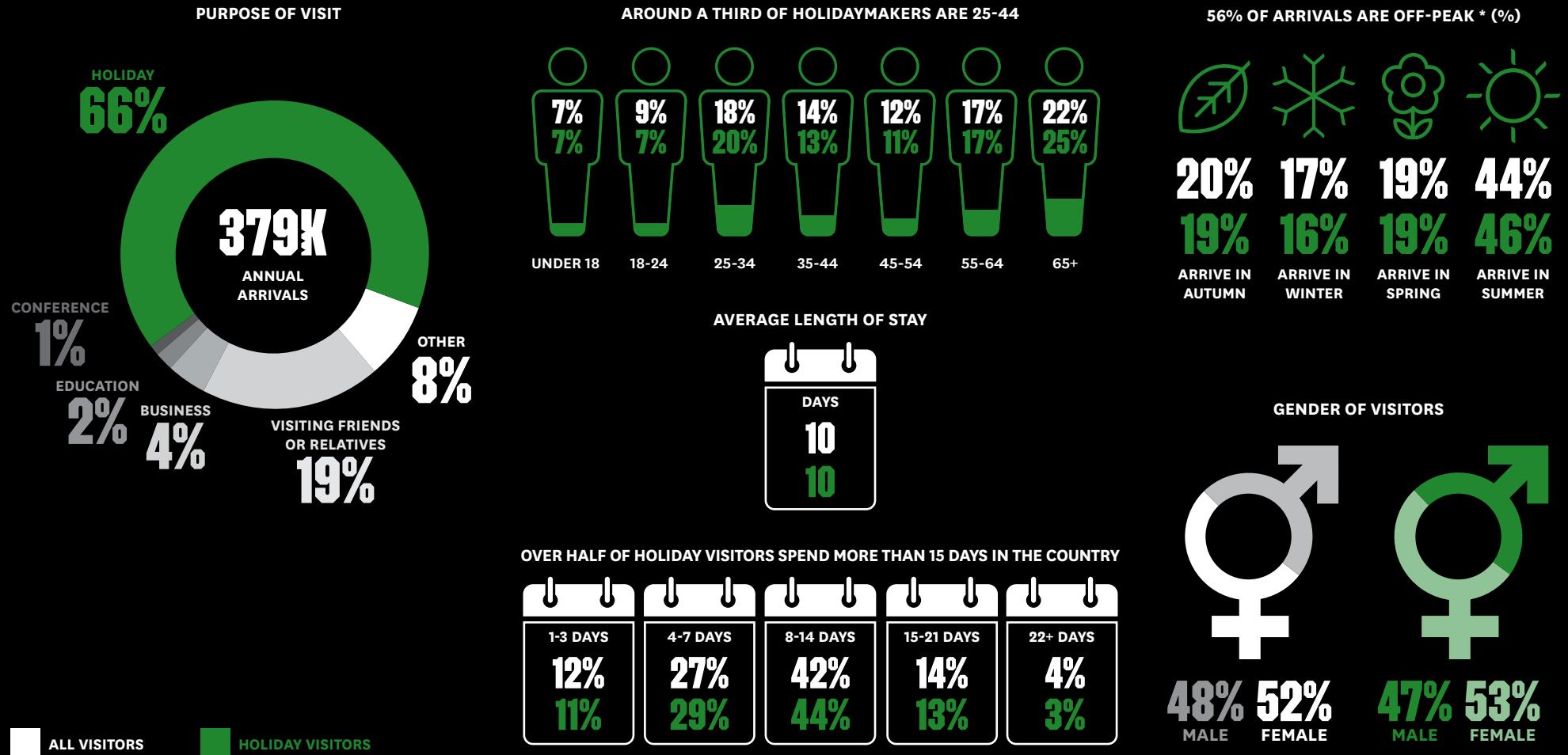
Latest USA market arrival insights



# USA



Last year, 379,000 US travellers (8.5% of all arrivals) visited New Zealand, with 250,000 (66%) of them being holiday visitors.



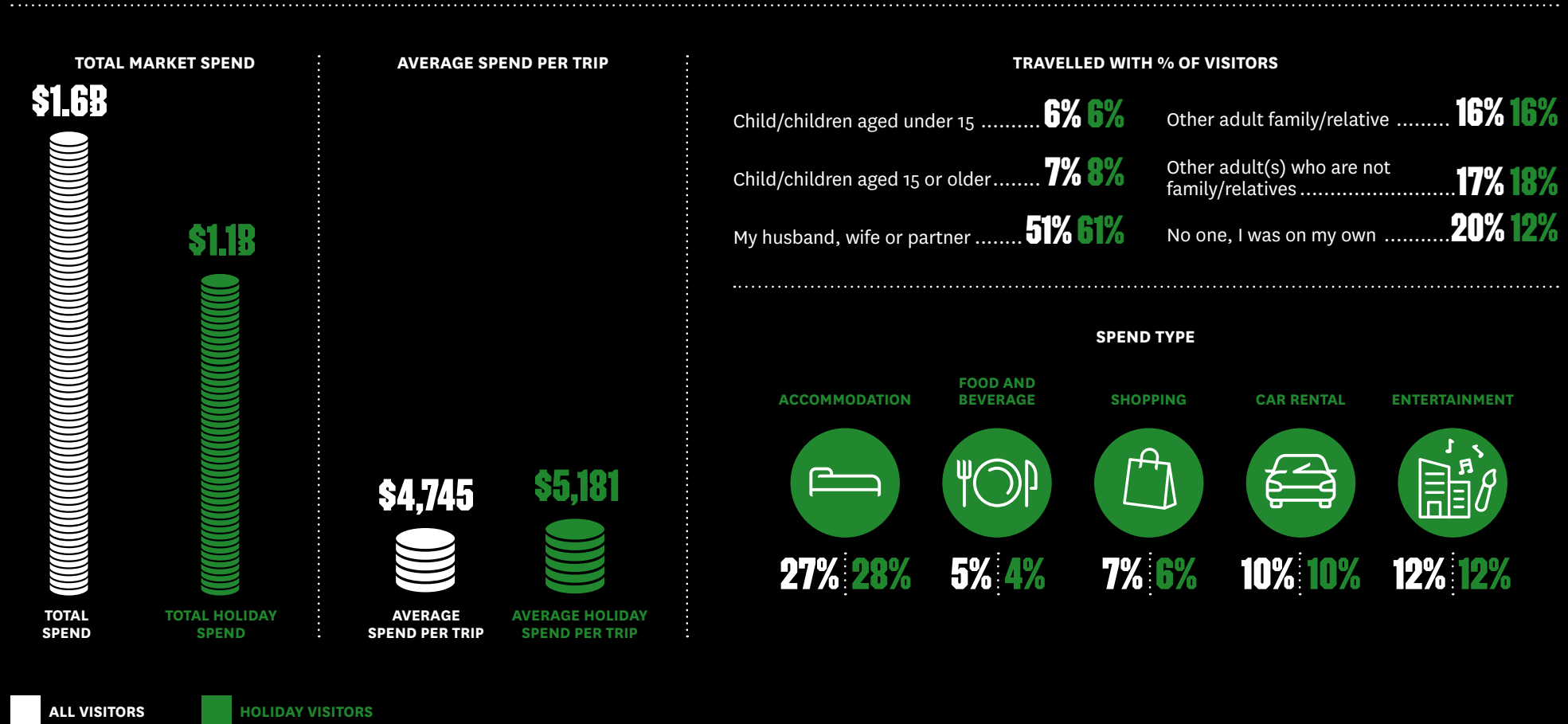
Source: Stats NZ international Visitor Arrivals – Year ending April 2024 –  
 \*Seasons: Autumn 23, Winter 23, Spring 23, Summer 23/24

# USA

## VISITOR SNAPSHOT



US visitors spent \$1.6 billion in New Zealand, with \$1.1 billion by holidaymakers. The average spend per trip was \$4,745, rising to \$5,181 for holiday visitors. Over a quarter of spending was on accommodation, and visitors were most likely to travel with their significant other.



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

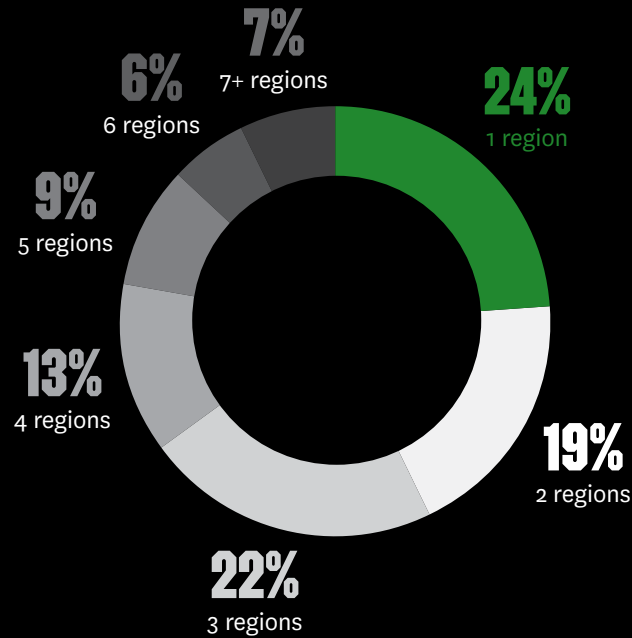
# USA

## TRAVELLER INSIGHTS

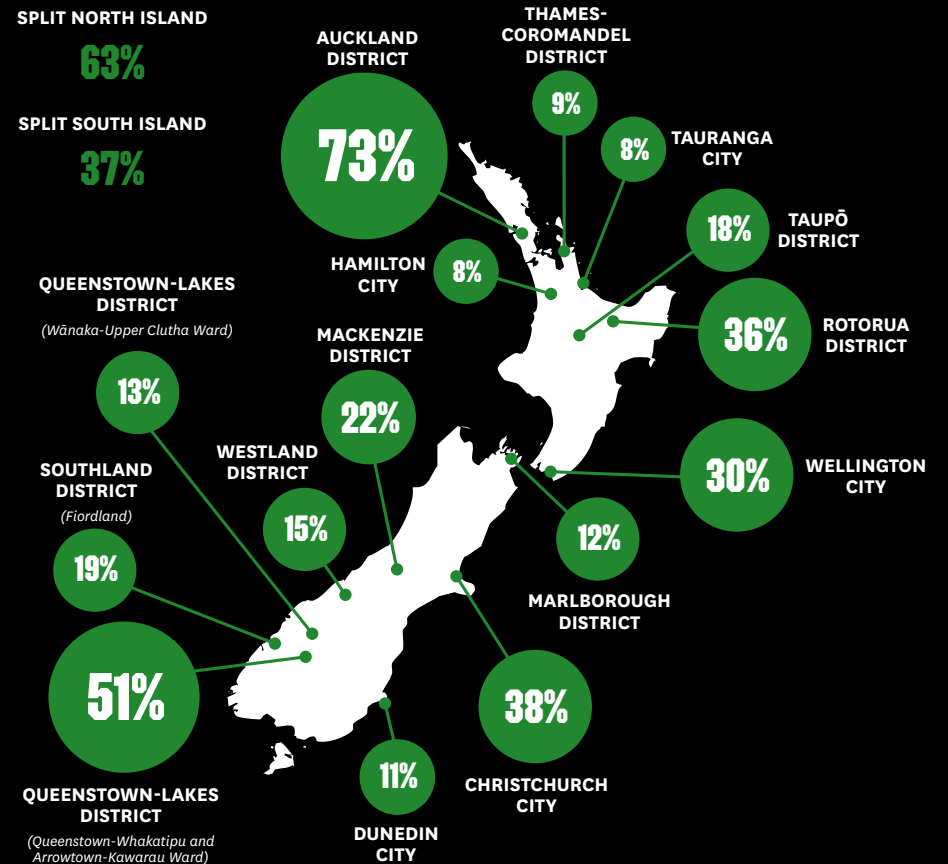


US holiday visitors spent the majority of their time in the North Island (63% of nights) while 37% of nights were spent in the South Island. Among them, 35% visited four or more regions, with Auckland being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



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

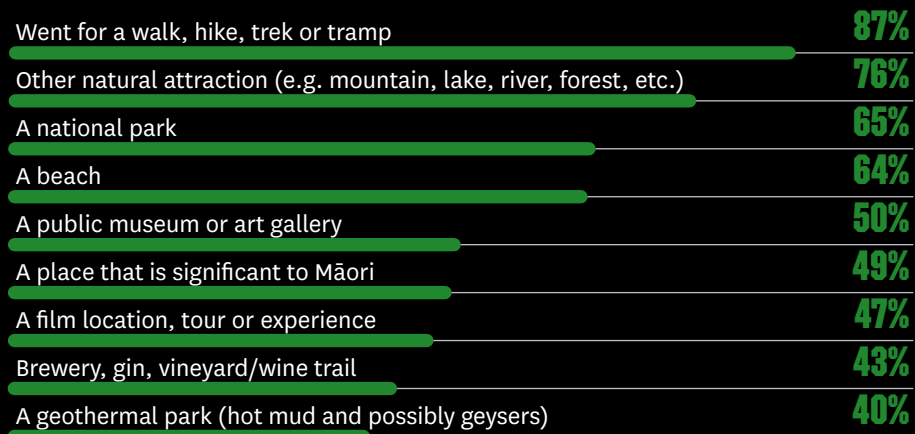
# USA

## TRAVELLER INSIGHTS

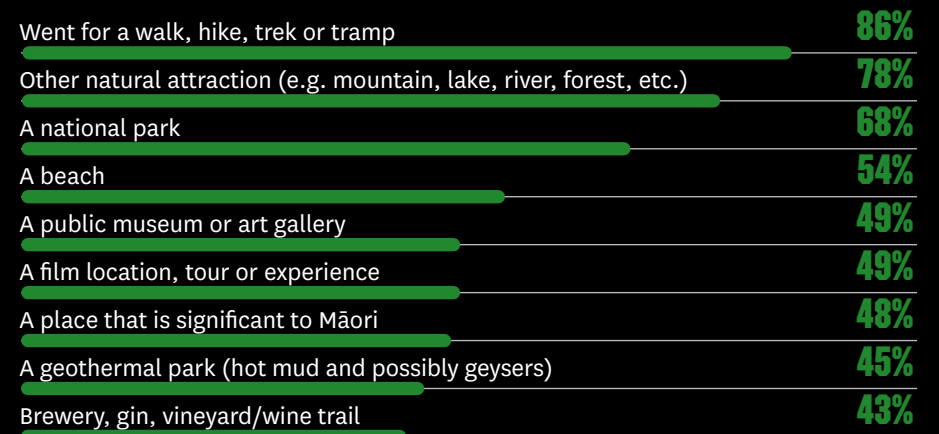


Most visitors favoured natural attractions like hiking, experiencing mountains and lakes, and national parks. The activity mix between summer and other seasons remains fairly consistent.

### TOP ACTIVITIES ENJOYED BY US VISITORS IN NEW ZEALAND - SUMMER



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



87%

Walk, hike, trek or tramp



76%

Other natural attractions



65%

A national park



86%

Walk, hike, trek or tramp



78%

Other natural attractions



68%

A national park

# USA

## TRAVELLER INSIGHTS



Most visitors opted for hotels or booking through online websites. Rental cars and app-based ride share services were popular transport options among holidaymakers.

### POPULAR ACCOMMODATION TYPES



**66%**

Hotel



**34%**

House/Apartment booked online (AirBnb etc)



**16%**

Luxury Accommodation



**16%**

Motel, Motor Inn or Serviced Apartment



**8%**

With family or friends



**8%**

Bed and Breakfast



**7%**

Other (paid) camping ground/holiday park



**7%**

Backpackers



**5%**

Free camping - staying in a tent, caravan, campervan/motorhome

### MODES OF TRANSPORT



**42%**

Rental car



**37%**

Uber or other app based



**37%**

Taxi/shuttle service



**32%**

Tour bus



**26%**

Plane (within New Zealand)



**20%**

Other ferry



**16%**

Local bus service



**13%**

The ferry between the North Island and the South Island



**12%**

Other boat or ship



# OUR AUDIENCES

## Our Active Considerers

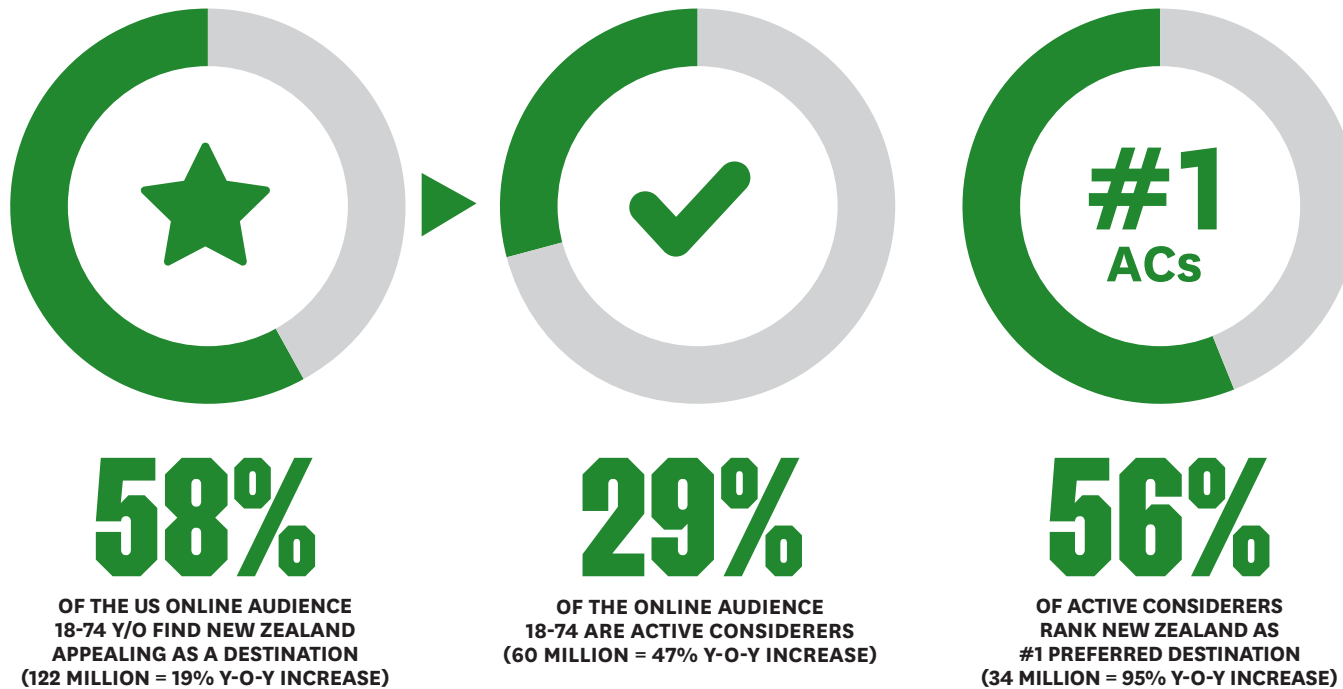
Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three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

# USA

## ACTIVE CONSIDERERS

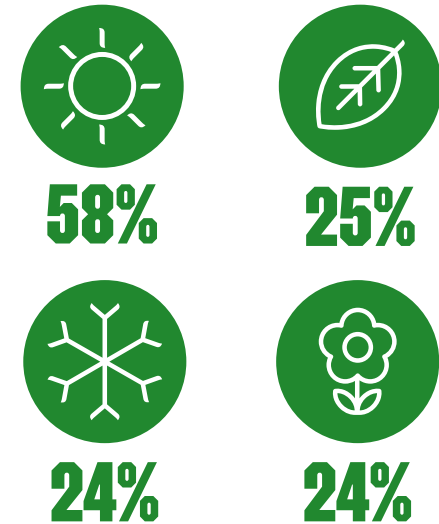


There are around 60 million Active Considerers in the USA, with 56% identifying New Zealand as their top destination choice.



### SEASONAL CONSIDERATION

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



### TOTAL OFF-PEAK CONSIDERATION\*



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

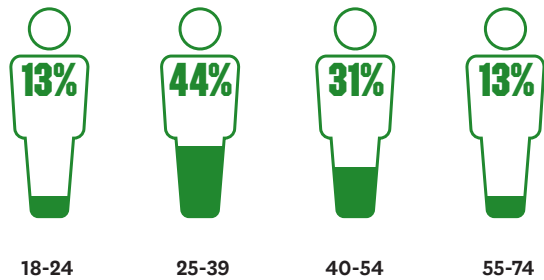


# USA

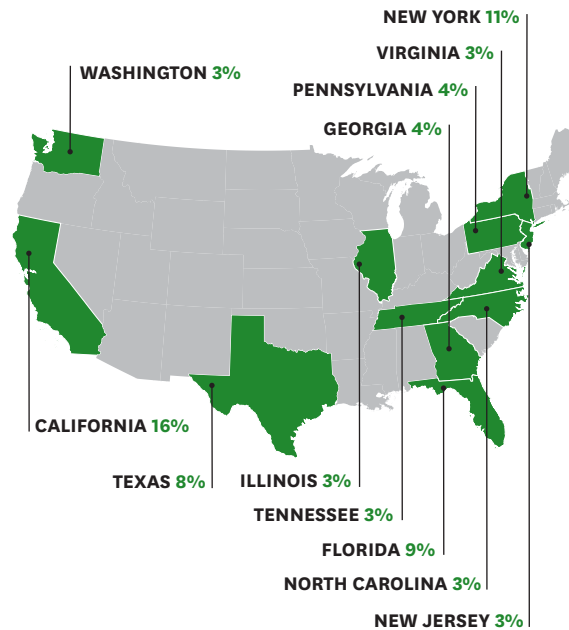
## ACTIVE CONSIDERERS

Active Considerers skew 25-39 and are more likely to be male. They largely reside in California, New York, Florida and Texas and nearly 4 in 10 have a household income of over USD\$100,000.

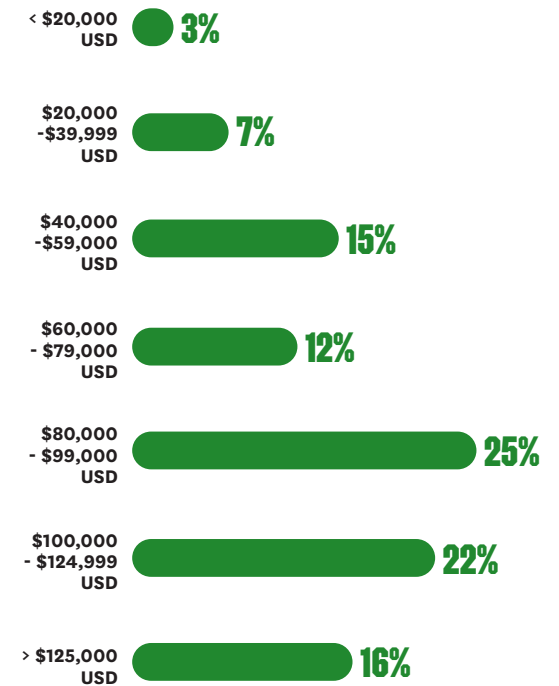
OVER 2/3 ACS ARE BETWEEN 25-54 YEARS



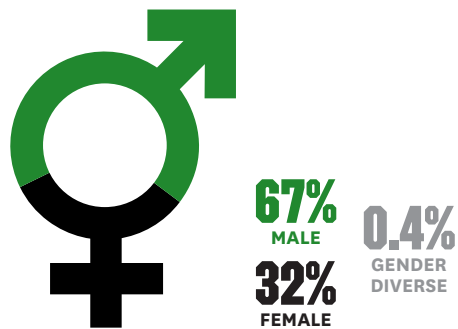
ACTIVE CONSIDERERS SKEW LARGELY WHERE THERE ARE DIRECT FLIGHT ROUTES



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



GENDER OF 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



# USA

## ACTIVE CONSIDERERS



Among US Active Considerers, New Zealand is renowned for stunning natural landscapes, being a safe place to escape the ordinary and offering a broad range of activities and experiences.

### BRAND ASSOCIATIONS



SPECTACULAR NATURAL LANDSCAPES AND SCENERY

**68%**



A PLACE YOU CAN ESCAPE FROM THE ORDINARY

**67%**



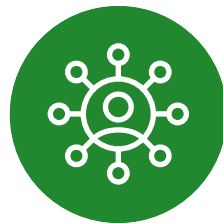
I WOULD FEEL SAFE TRAVELLING AROUND THIS DESTINATION

**67%**



OFFERS A WIDE VARIETY OF OUTDOOR & ADVENTURE ACTIVITIES

**67%**



OFFERS A WIDE VARIETY OF TOURIST EXPERIENCES

**67%**



THE ENVIRONMENT THERE IS CLEAN AND UNPOLLUTED

**66%**



IDEAL FOR HAVING FUN AND ENJOYING YOURSELF

**66%**



HAS A UNIQUE INDIGENOUS CULTURE

**64%**



A DESTINATION THAT EMBRACES VISITORS OF ALL CULTURES

**64%**

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

# USA

## ACTIVE CONSIDERERS



Our beautiful landscapes, the opportunity for relaxation and overall enjoyment are key reasons to visit.

### REASONS TO VISIT NEW ZEALAND



TO EXPERIENCE BEAUTIFUL  
LANDSCAPES/SCENERY

**45%**



TO FEEL RELAXED  
AND REFRESHED

**40%**



TO HAVE FUN &  
ENJOY MYSELF

**40%**



TO LEARN & EXPLORE  
NEW THINGS

**39%**



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

**36%**



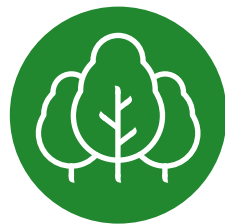
TO FEEL A SENSE  
OF ADVENTURE

**34%**



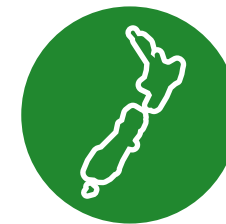
TO INTERACT WITH PEOPLE OF A  
DIFFERENT CULTURE OR LIFESTYLE

**32%**



TO GET IN TOUCH  
WITH NATURE

**32%**



TO SHOW MY CHILDREN A  
DIFFERENT WAY OF LIFE

**23%**

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

# USA

## ACTIVE CONSIDERERS



Our Active Considerers are highly interested in experiencing New Zealand’s cuisine, exploring our beaches and coasts, and visiting historical and heritage sites.

### ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



TRYING LOCAL CUISINE  
**83%**



BEACHES & COASTS  
**82%**



HISTORICAL SITES AND HERITAGE SITES  
**80%**



SHOPPING FOR LOCAL ARTS & CRAFTS  
**78%**



MUSEUMS & GALLERIES  
**78%**



VISITING NATIONAL PARKS, NATURE RESERVES OR NATIVE FORESTS  
**78%**



WILDLIFE EXPERIENCES  
**77%**



EXPLORING MAIN CITIES  
**77%**



TRYING LOCAL WINE OR BEER  
**76%**

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



**USA**

ACTIVE CONSIDERERS

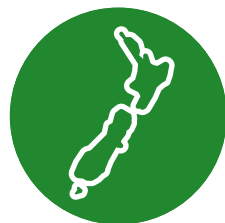


Key concerns and knowledge gaps for potential US visitors include weather conditions, flight time to New Zealand and ease of travelling within New Zealand.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



WHAT THE WEATHER IS LIKE  
**39%**



THE LENGTH OF TIME REQUIRED TO FLY TO NEW ZEALAND  
**35%**



HOW EASY IT IS TO TRAVEL AROUND  
**35%**



HOW WELCOMING THE LOCALS ARE  
**34%**



THE QUALITY AND VARIETY OF FOOD AND BEVERAGE OPTIONS  
**32%**



HOW SAFE IT IS TO PARTICIPATE IN ADVENTURE ACTIVITIES  
**31%**



HOW SAFE IS IT FROM CRIME  
**30%**



WHERE I SHOULD GET INFORMATION ABOUT ORGANISING A HOLIDAY  
**29%**



WHAT PRACTICES ARE IN PLACE TO KEEP ME SAFE FROM COVID (E.G. MASKS, HAND SANITISER ETC.)  
**28%**

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