

# CYCLE TOURISM INSIGHTS

New Zealand and Australian Market Summary

Based on June 2021 survey (sample n=1,504)

SEPTEMBER 2021

# OVERVIEW OF CYCLE TOURISM MARKET – NEW ZEALAND

Approximately 27% of the New Zealand adult population have participated in a cycle tourism activity in the past year, while 18% are interested in participating in the next two years.



## AGE



7 in 10 are aged between

**18-49**

## LIFESTAGE/DEPENDENTS



**41%**

Single/couple,  
no children



**36%**

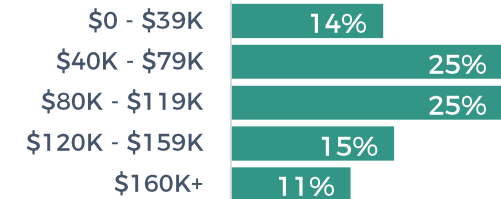
Single/couple,  
children living  
at home



**19%**

Single/couple,  
children no  
longer at home

## ANNUAL HOUSEHOLD INCOME



## ETHNICITY

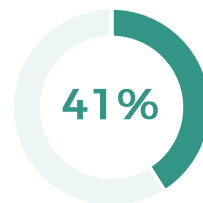
**64%**  
NZ European

**11%**  
NZ Māori

**12%**  
Asian

**4%**  
Pasifika

## DISABILITY



have some form of  
disability or impairment

## CYCLE TOURISM MARKET MAINLY IN URBAN CENTRES

Auckland **38%**

Waikato **10%**

Wellington & Wairarapa **10%**

Canterbury **15%**

Otago **5%**

# OVERVIEW OF CYCLE TOURISM MARKET – AUSTRALIA

Approximately 21% of the Australian adult population have participated in a cycle tourism activity in the past year, while 13% are interested in participating in the next two years.



## AGE



7 in 10 are aged between

**18-49**

## LIFESTAGE/DEPENDENTS



**38%**

Single/couple,  
no children



**44%**

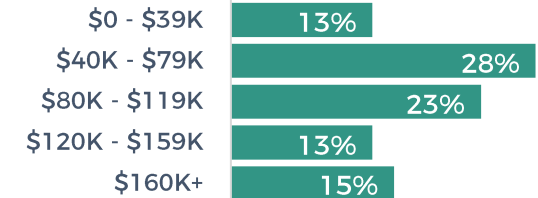
Single/couple,  
children living  
at home



**17%**

Single/couple,  
children no  
longer at home

## ANNUAL HOUSEHOLD INCOME



## ETHNICITY

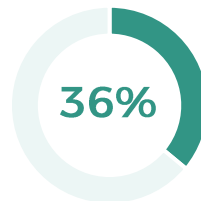
**81%**  
Australian

**9%**  
Asian

**1%**  
NZ European

**7%**  
Other European

## DISABILITY



have some form of  
disability or impairment

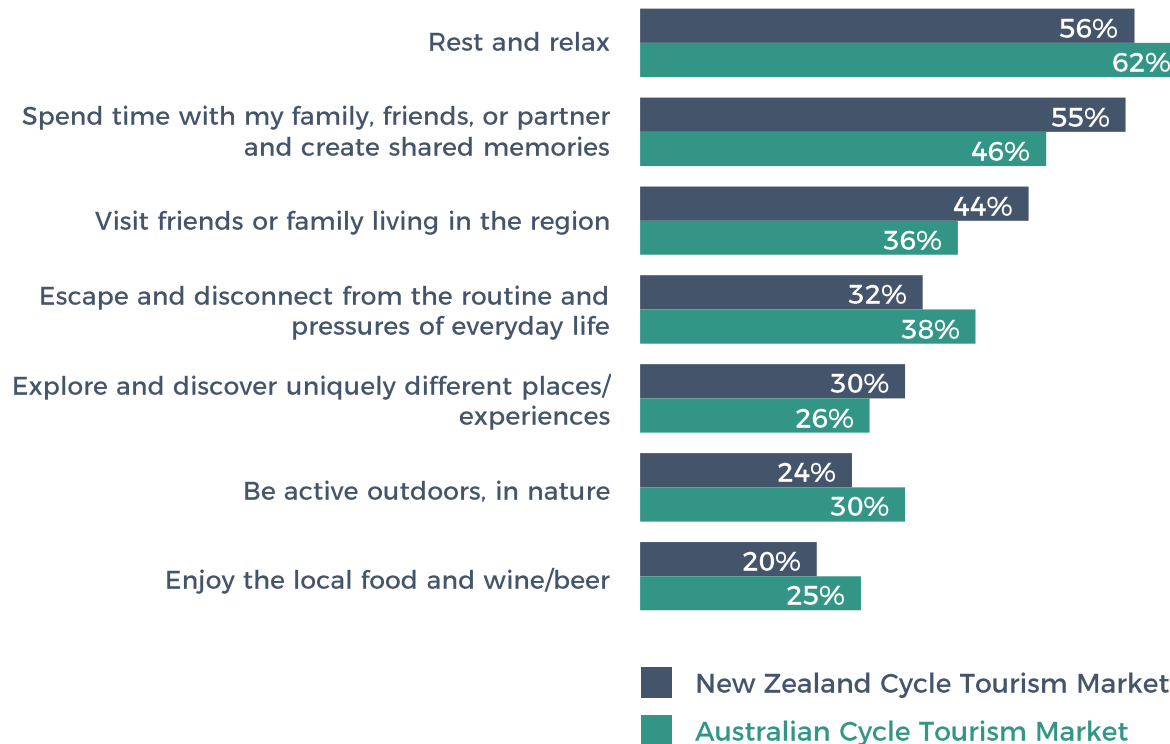
## CYCLE TOURISM MARKET MAINLY ON EASTERN SEABOARD

Queensland **21%**  
New South Wales **30%**  
Victoria **28%**  
Western Australia **10%**

# TRAVEL MOTIVATORS AND NEW ZEALAND APPEAL

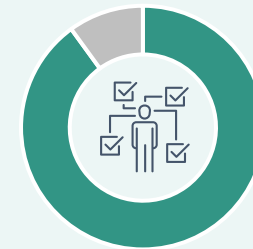
Most of the market's leisure travel is driven by opportunities to relax or reconnect with family and friends. The majority of the Australian market sees New Zealand as an appealing destination.

KEY REASONS FOR TAKING LEISURE TRIPS



The New Zealand market is more likely to be motivated to undertake leisure travel to explore different places, be active outdoors in nature and enjoy local food, wine and beer, while Australians are more likely to want to rest and relax and escape/disconnect.

AND OF THE AUSTRALIAN CYCLE TOURISM MARKET...



find New Zealand appealing as a destination for a short break or holiday



are likely to travel to New Zealand for leisure within the next three years

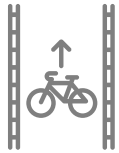
# CYCLE TOURISM DONE IN PAST YEAR

Approximately three in five of those in the cycle tourism market have done a cycle tourism activity in the past year – most commonly cycling in an urban area.

Key:

- New Zealand
- Australia

CYCLING ACTIVITIES THOSE IN THE CYCLE TOURISM MARKET HAVE PARTICIPATED IN (IN THE PAST YEAR, WHILE TRAVELLING FOR LEISURE)



**35% / 34%**

Cycled in an urban area



**13% / 12%**

Cycled to/around specific destination or attraction



**17% / 17%**

Cycled on a bike or mountain bike trail



**11% / 10%**

Cycled at a mountain bike park



**18% / 25%**

Cycled in national, regional or state park



**4% / 5%**

Multi-day 'bike-packing' or cycle touring trip



**8% / 7%**

Attended cycling event (as participant)



**7% / 7%**

Attended cycling event (as spectator)

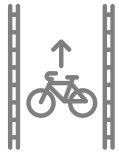
# CYCLE TOURISM ACTIVITIES INTERESTED IN (NON-PARTICIPANTS)

For those who haven't participated in cycle tourism at all, or recently, interest is strongest for cycling in regional/national parks and urban cycling.

Key:

- New Zealand
- Australia

CYCLING ACTIVITIES THE PROSPECTIVE CYCLE TOURISM MARKET IS INTERESTED IN DOING (ON A TRIP AWAY FROM HOME IN NEXT TWO YEARS)



**45% / 44%**

Cycling in an urban area



**44% / 34%**

Cycling to/around specific destination or attraction



**40% / 25%**

Cycling on a bike or mountain bike trail



**14% / 14%**

Cycling at a mountain bike park



**45% / 55%**

Cycling in national, regional or state park



**12% / 5%**

Multi-day 'bike-packing' or cycle touring trip



**4% / 4%**

Attending cycling event (as participant)



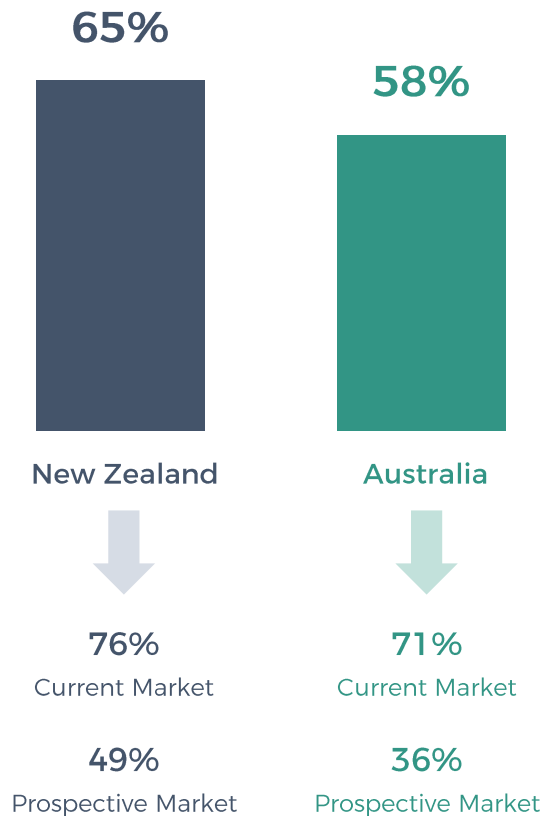
**10% / 9%**

Attending cycling event (as spectator)

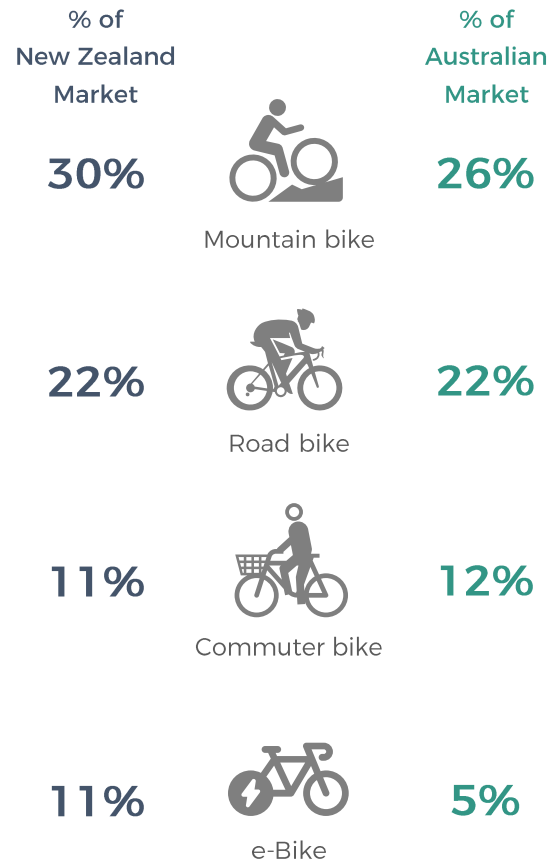
# BIKE OWNERSHIP AND CYCLING FREQUENCY

Bike ownership/access is relatively high, especially amongst the *current* cycle tourism market, but the majority of the market are not regular cyclists.

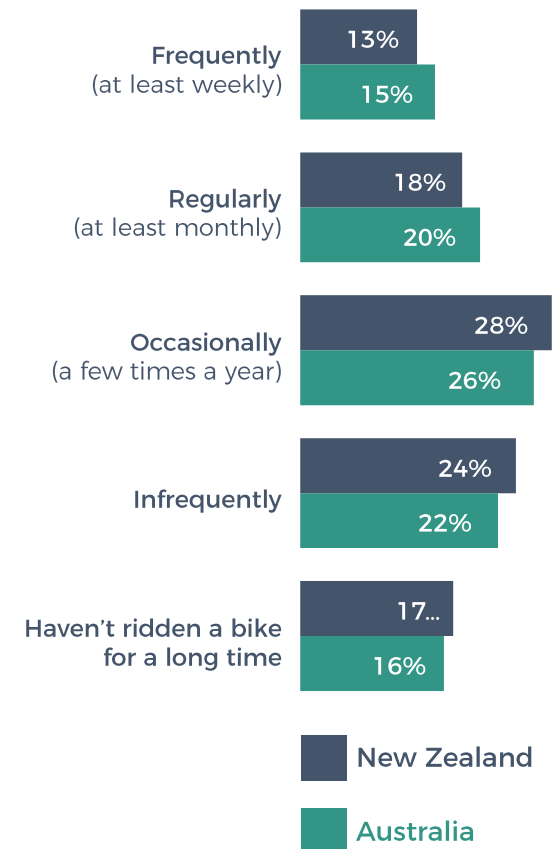
% OF CYCLE TOURISM MARKET THAT OWNS A BIKE OR HAS EASY ACCESS TO ONE



TYPE OF BIKE (of those who own or have easy access to a bike)



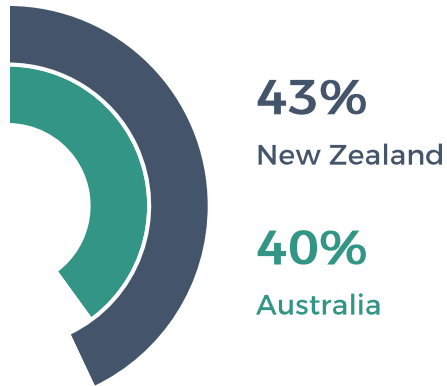
FREQUENCY OF CYCLING ACTIVITY



# FUTURE CYCLE TOURISM PLANS / INTEREST

Around two in five in the market are planning to participate in a cycle tourism activity or experience in the next year.

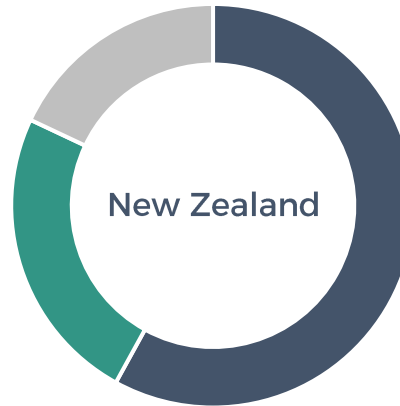
% OF MARKET PLANNING TO UNDERTAKE A CYCLE TOURISM ACTIVITY IN THE NEXT YEAR



Key reasons for interest in participating in a cycle tourism activity:

-  Fun and enjoyable experience
-  Opportunity to explore nature and scenery
-  Opportunity to improve fitness/physical activity

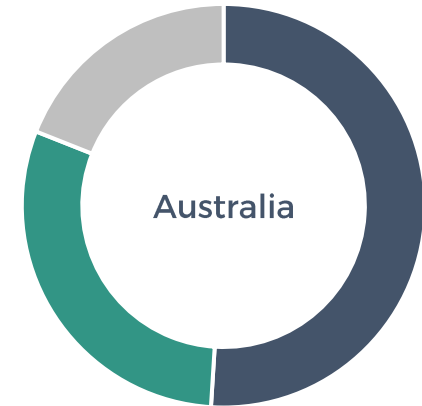
LEVEL OF INTEREST IN DOING A CYCLE TOURISM ACTIVITY IN THE NEXT THREE YEARS  
(of those in the market who aren't planning to participate in cycle tourism in the next year)



**58%**  
Interested

**24%** Neither interested  
nor disinterested

**18%** Not interested



**52%**  
Interested

**30%** Neither interested  
nor disinterested

**19%** Not interested



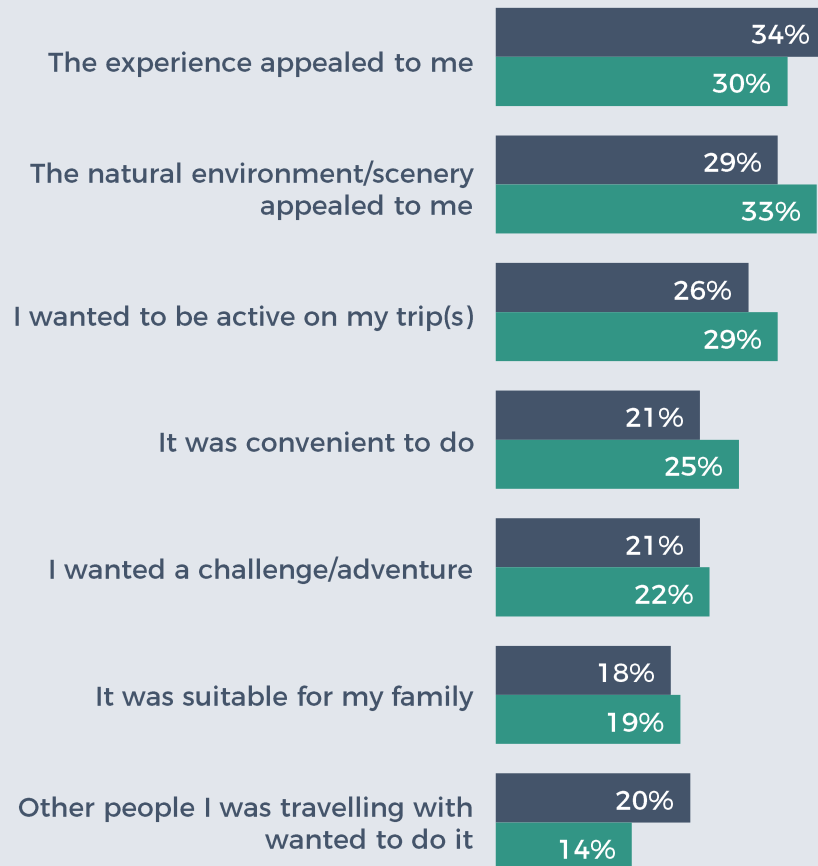
# DRIVERS OF CYCLE TOURISM ACTIVITY

The appeal of the experience and the surrounding natural environment are key drivers of cycle tourism participation.

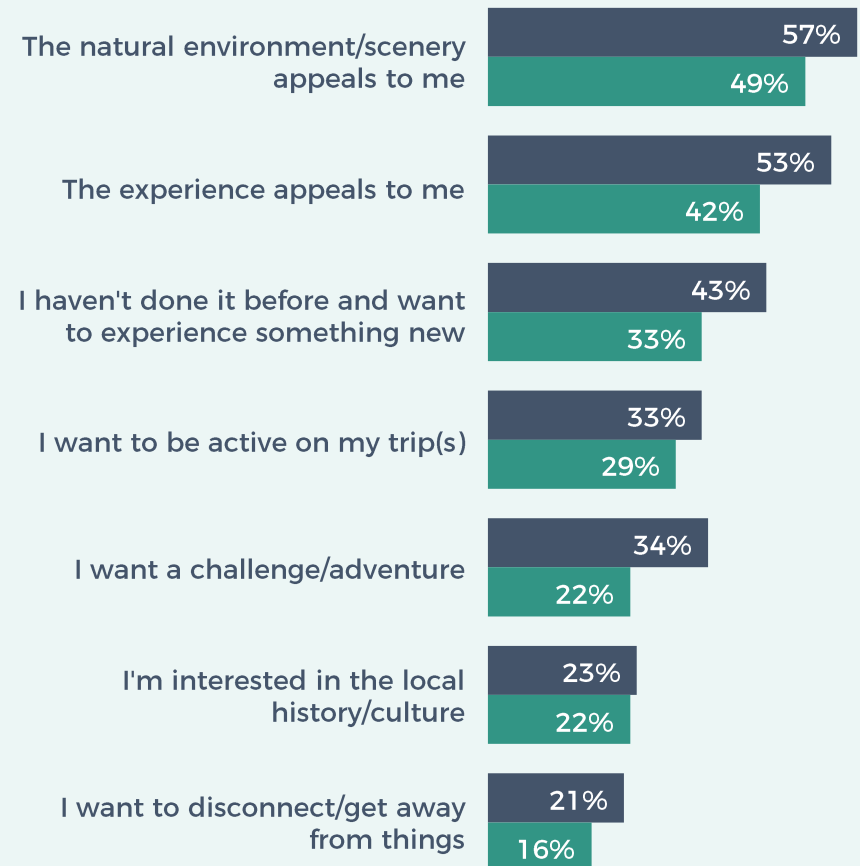
Key:



KEY REASONS THE **CURRENT** CYCLE TOURISM MARKET DID A CYCLE TOURISM ACTIVITY IN THE PAST YEAR



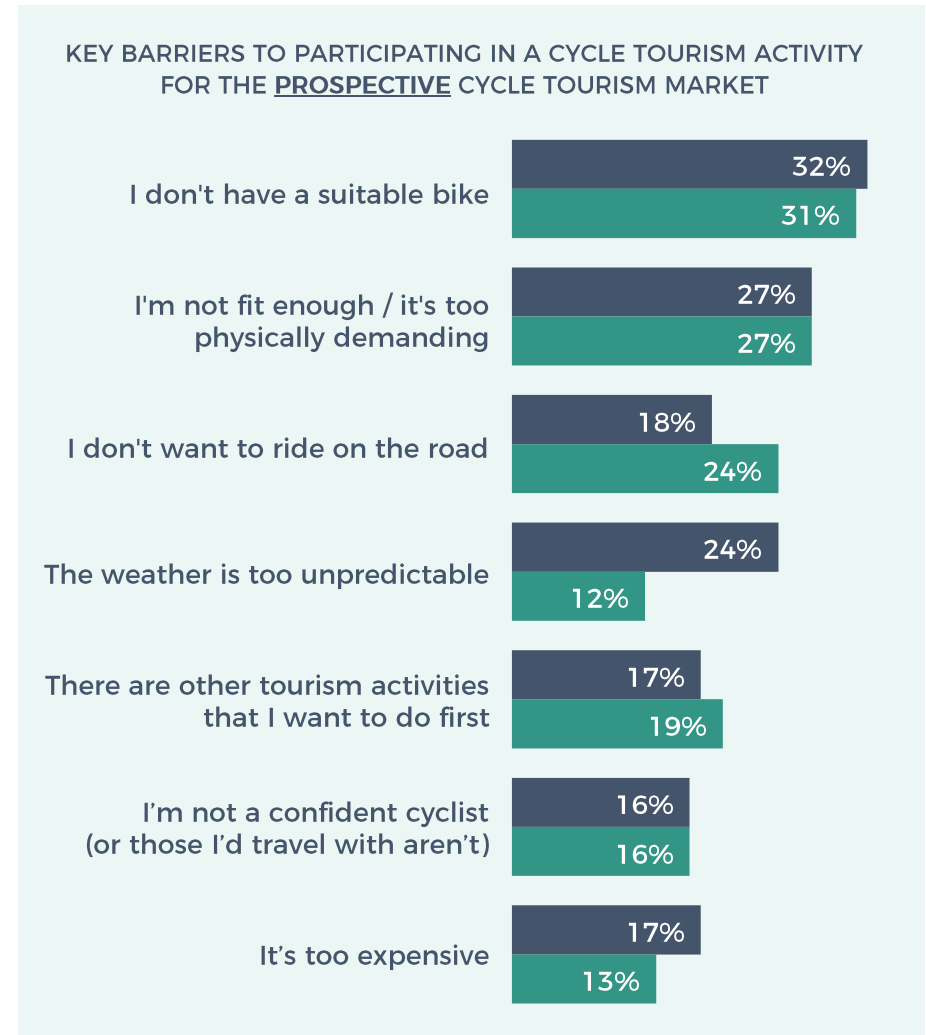
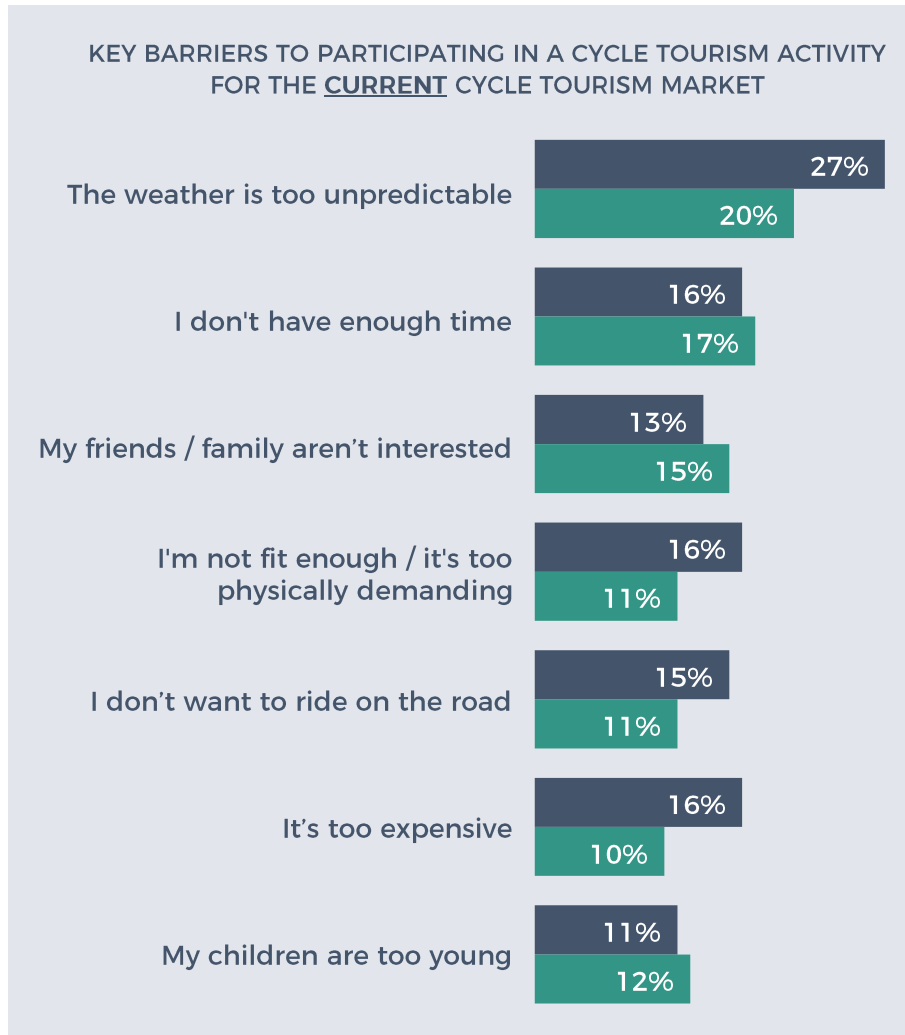
KEY REASONS THE **PROSPECTIVE** CYCLE TOURISM MARKET IS INTERESTED IN DOING A CYCLE TOURISM ACTIVITY IN FUTURE



# BARRIERS TO PARTICIPATION

The main barriers to cycle tourism participation are the weather being too unpredictable, not being fit enough, and not having a suitable bike.

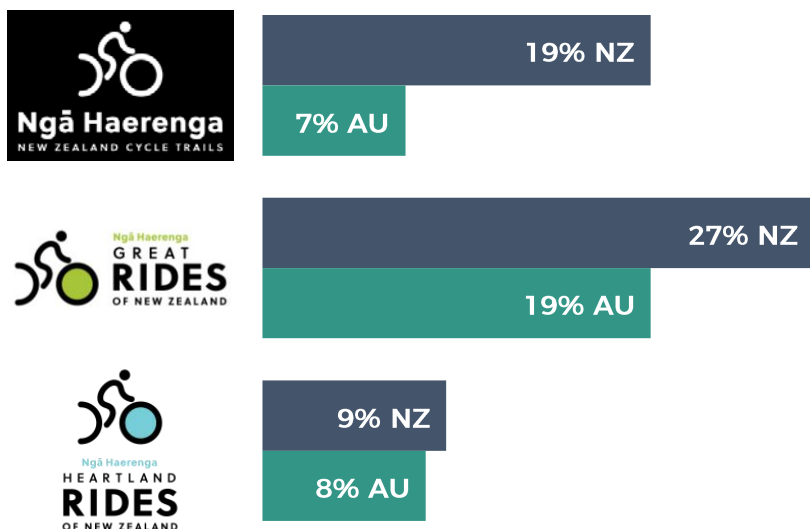
Key:



# KNOWLEDGE AND INTEREST - NGĀ HAERENGA NEW ZEALAND CYCLE TRAILS

Although brand awareness is relatively low, 62% of the New Zealand cycle tourism market and 34% of the Australian cycle tourism market have been on at least one of the New Zealand Cycle Trails.

## BRAND/PRODUCT AWARENESS



## PREVIOUS EXPERIENCE OF NEW ZEALAND CYCLE TRAILS (AVERAGE)

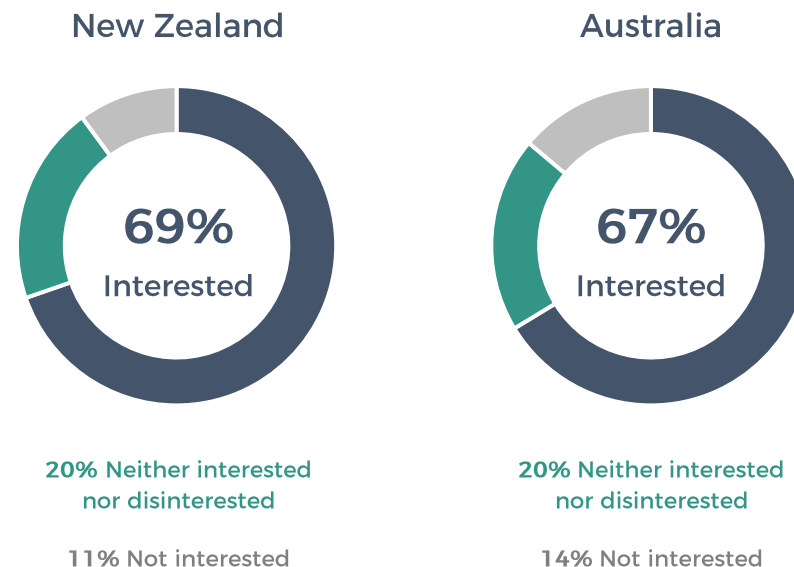
**2.3 trails**

Based on 62% of Kiwis who've been on at least one New Zealand Cycle Trail

**1.8 trails**

Based on 34% of Australians who've been on at least one New Zealand Cycle Trail

## LEVEL OF INTEREST DOING A CYCLE TOURISM ACTIVITY ON A NGĀ HAERENGA NEW ZEALAND CYCLE TRAIL WITHIN THE NEXT THREE YEARS



Approximately two thirds of the cycle tourism market are interested in doing a cycle tourism activity on Ngā Haerenga New Zealand Cycle Trails in the next three years.

# IDEAL CYCLE TRAIL EXPERIENCE – NEW ZEALAND

The ideal experience for most New Zealanders would last less than a day, underscoring the importance of promoting trail sections as well as complete trails.

## LENGTH OF EXPERIENCE



**25%**  
Want to cycle for more than a day

## ACCOMMODATION

(of those who want to cycle for more than a day)



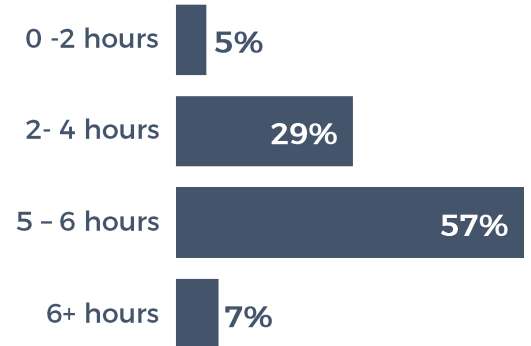
**26%**  
Bed and breakfast



**25%**  
Airbnb/rented holiday house

## DAILY CYCLING HOURS

(of those who want to cycle for more than a day)



## TRAVEL PARTY



**32%** Partner only



**17%** Family only



**16%** Alone

## BIKE USAGE



**69%** Bike



**25%** E-bike

**6%** Don't know/Other

## LEVEL OF SUPPORT



**19%**  
Full guided tour

**41%** Partial support  
(e.g. shuttle/luggage transfers)

**37%** Independent trip  
(e.g. self-directed riding)

**3%** Don't know

# IDEAL CYCLE TRAIL EXPERIENCE – AUSTRALIA

The ideal experience for a fifth of Australians would last three or more days. A third want full support on their experience where all logistics are taken care of, including an accompanying guide.

## LENGTH OF EXPERIENCE



**27%**  
Want to cycle for  
more than a day

## ACCOMMODATION

(of those who want to cycle for more than a day)



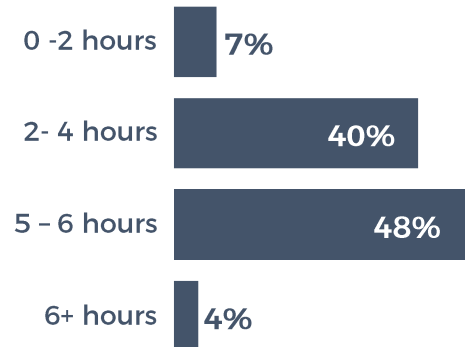
24%  
Hotel



22%  
Holiday park

## DAILY CYCLING HOURS

(of those who want to cycle for more than a day)



## TRAVEL PARTY



35% Partner only



18% Alone



16% Family only

## BIKE USAGE



69% Bike



26% E-bike

6% Don't know/Other

## LEVEL OF SUPPORT



**33%**  
Full guided tour

45% Partial support  
(e.g. shuttle/luggage transfers)

18% Independent trip  
(e.g. self-directed riding)

4% Don't know

# VISITOR EXPENDITURE

The average daily expenditure for Ngā Haerenga Great Rides New Zealand trail users is \$228 per person, and the average total trip spend is \$697 per person. Users with above average expenditure include Aucklanders, those aged 60+, multi-day users, and users with the trail as main trip reason.

EXPENDITURE DURING VISIT TO THE AREA (PER PERSON)  
(including time spent on and off Great Ride, and prepaid costs)

