

TOURIST ACTIVITY | CYCLE TOURISM

NEW ZEALAND | SERIES B5 | SEPTEMBER 2009



INTRODUCING CYCLE TOURISM

This report provides an overview of cycle tourism in New Zealand including trends and characteristics of cycle tourists. Cycling, both road cycling and mountain biking, is a popular tourist activity. New Zealand offers a variety of cycling experiences, from cycle tours of rail or wine trails, to more adventurous mountain biking.

The upcoming construction of cycleways around New Zealand will provide more cycling opportunities for tourists and locals, expanding this market further. For more information on the New Zealand Cycleway Project, see [www.tourism.govt.nz/cycleway](http://www.tourism.govt.nz/cycleway).

Cycle tourists are defined as international and domestic visitors, aged 15 years and over, who cycle (both road cycling and mountain biking) at least once while travelling in New Zealand. Residents who cycle within their local area are not included in this definition.

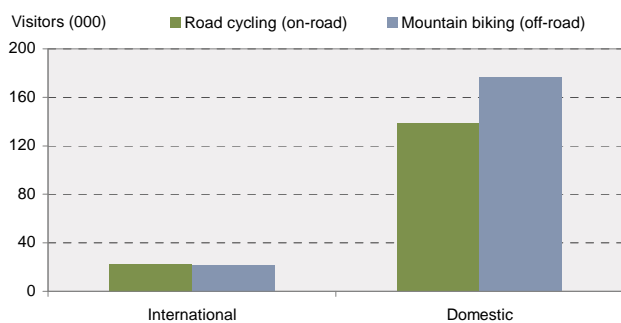
TRENDS IN CYCLE TOURISM

How many tourists cycle?

Approximately 356,900 tourists cycled in 2008. International cycle tourists made up 12% (or 42,100) of all cycle tourists, while domestic cycle tourists made up the remaining 88% (or 314,900) (excluding local residents). Two percent of all international tourists cycled while in New Zealand. One percent of domestic tourists cycled while on a trip within New Zealand.

Slightly more international tourists went road cycling (22,400) than mountain biking (21,700), whereas more domestic tourists participated in mountain biking (176,600) than road cycling (138,300) (Figure 1).

Figure 1: Road Cycling & Mountain Biking, 2008 <sup>\*\*1,2</sup>



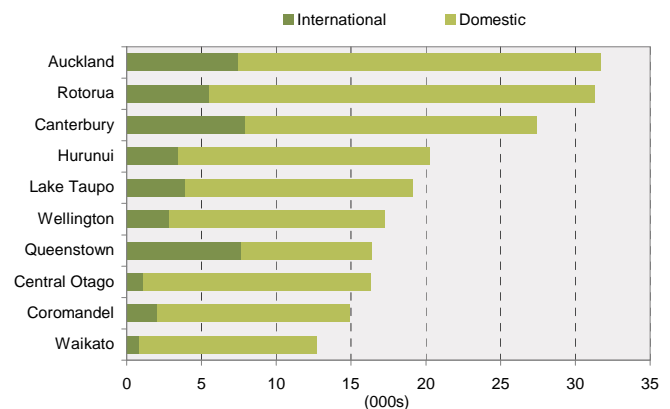
Where do tourists cycle?

The Regional Tourism Organisation (RTO) area with the most cycle tourists was Auckland (31,700), Rotorua (31,300), Canterbury (27,400) and Hurunui (20,300) (Figure 2).

The RTO areas which attracted the greatest number of international cycle tourists were Canterbury (7,900 tourists or 15% of all international cycle tourists), Queenstown (7,700 or 14%), Auckland (7,500 or 14%) and Rotorua (5,500 or 10%).

The RTO areas most commonly visited by domestic cycle tourists were Rotorua (25,700 or 11%), Auckland (24,200 or 10%) and Canterbury (19,500 or 8%).

Figure 2: Main RTOs Where International & Domestic Tourists Cycle, 2004-08 <sup>\*\*1,2</sup>



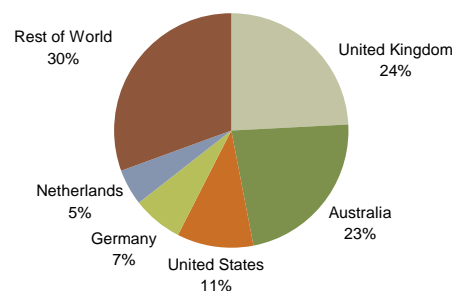
Tourists who participated in the same activity more than once in the same RTO are only counted once.

CHARACTERISTICS OF CYCLE TOURISTS

Where do cycle tourists come from?

International visitors from the United Kingdom (24%), Australia (23%) and the United States (11%) made up the largest share of all international cycle tourists (Figure 3). This is consistent with these being New Zealand's three largest international visitor markets. Germany (7%) and the Netherlands (5%) also made up significant shares of international cycle tourists.

Figure 3: Origin of International Cycle Tourists, 2004-08 <sup>\*\*1</sup>



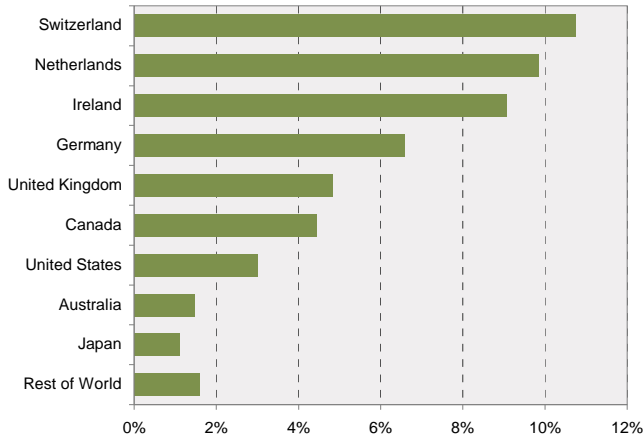
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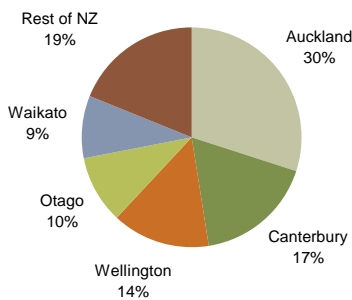
International tourists with the highest propensity, or likelihood, to cycle were from Switzerland (11% of all Swiss tourists cycled in New Zealand), followed by the Netherlands (10%), Ireland (9%) and Germany (7%) (Figure 4).

Figure 4: Propensity of International Cycle Tourists by Market, 2004-08 <sup>\*1</sup>



Domestic cycle tourists primarily came from the five large population centres - Auckland (30%), Canterbury (17%), Wellington (14%), Otago (10%) and Waikato (9%) (Figure 5).

Figure 5: Origin of Domestic Cycle Tourists, 2004-08 <sup>\*2</sup>

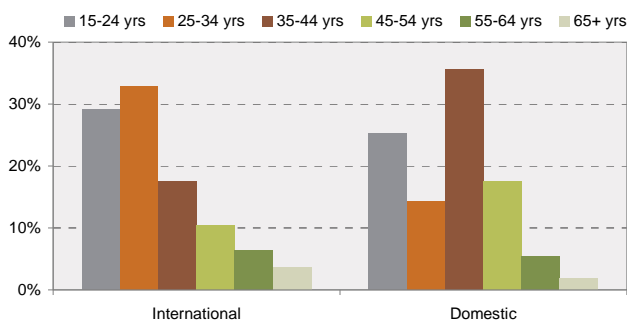


### What is the age profile of cycle tourists?

The age profiles of international and domestic cycle tourists differ noticeably (Figure 6). International visitors aged 25-34 years (33%) and 15-24 years (29%) accounted for the largest shares. This is a younger age profile than all international tourists.

Among domestic tourists, those aged 35-44 made up the largest share (36%), followed by visitors aged 15-24 years (25%). This is a younger age profile, with a higher share of 35-44 year olds than all domestic tourists.

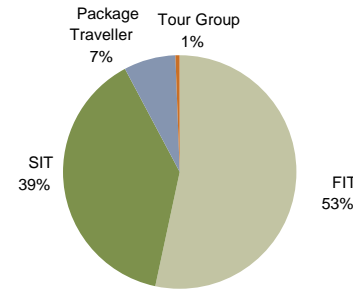
Figure 6: Age Profile of Cycle Tourists, 2004-08 <sup>\*1\*2</sup>



### What are the travel styles of international cycle tourists?

International cycle tourists were predominantly independent travellers, with 53% fully-independent travellers (FITs) and 39% semi-independent travellers (SITs). Package travellers (7%) and tour group travellers (1%) made up the remainder (Figure 7). Cycle tourists account for a larger proportion of independent travellers than all international tourists.

Figure 7: Travel Styles of International Cycle Tourists, 2004-08 <sup>\*1</sup>



*FIT: made and paid for all travel arrangements after arrival in New Zealand*  
*SIT: made and paid for at least one travel arrangement before arrival in New Zealand*

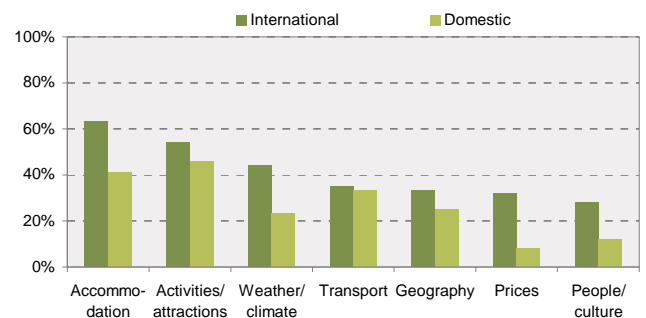
### What information do cycle tourists seek before they arrive?

Cycle tourists sought a variety of information about a region before they arrived (Figure 8). International cycle tourists tended to undertake more research about a region than domestic cycle tourists.

International cycle tourists were more likely to find out information, prior to arrival, about activities and attractions (63% of all international cycle tourists), followed by accommodation (54%), weather/climate (44%), local prices (35%), local transport (33%), people/culture (32%) and geography (28%). These are similar patterns to all international tourists.

Domestic cycle tourists search for information, prior to arrival, on accommodation (46% of all domestic cycle tourists), activities and attractions (41%), local prices (33%), local transport (25%) and weather/climate (23%). This is similar to all domestic tourists.

Figure 8: Type of Information Cycle Tourists Sought Prior to Arriving in Region, 2006-08 <sup>\*3</sup>



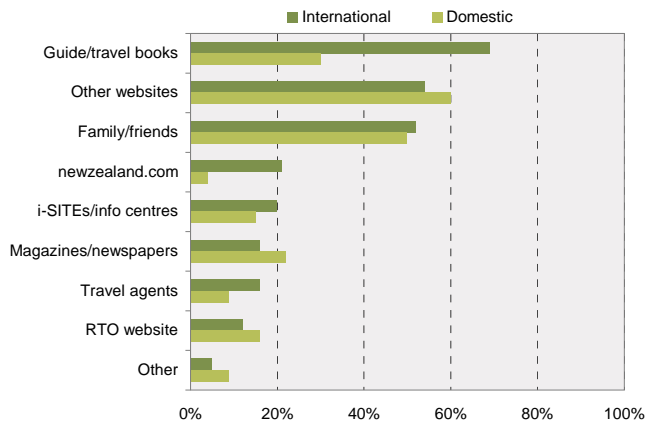
### What sources do cycle tourists use to find information?

Sixty nine percent of international cycle tourists used guide/travel books as a source of regional information, followed by other websites (54%) and advice from family/friends (52%) (Figure 9). A smaller proportion used newzealand.com (21%) and i-SITes/information centres (20%). These patterns were similar of the information sources all international tourists used.

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Domestic cycle tourists mainly used other websites (60%), advice from family/friends (50%), guide/travel books (30%) and magazines/newspapers (22%) as sources of regional information. Similar shares of all domestic tourists used these sources, although domestic cycle tourists used a greater number of sources.

Figure 9: Source of Information International Cycle Tourists Use Prior to Arriving in Region, 2006-08 \*3

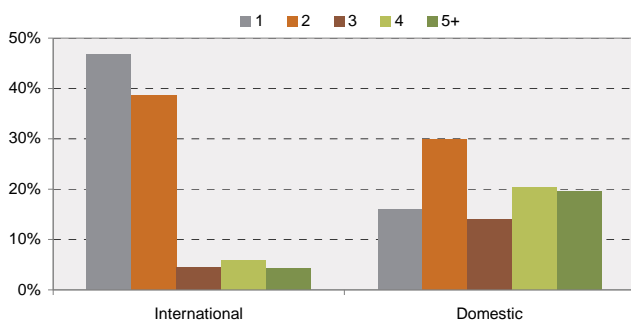


### Who do cycle tourists travel with?

The greatest share of international cycle tourists travelled alone (47%), while 28% travelled with their partner/spouse. Ten percent travelled with family and 13% with friends. Among domestic cycle tourists, 37% travelled with family, 21% travelled with friends and 16% travelled alone or with a partner/spouse.

These patterns were also reflected in the group size profile, where international cycle tourists mostly travelled alone (47%) or in pairs (39%). Most domestic cycle tourists travelled in pairs (30%). Sixteen percent travelled alone and a significant share (54%) travelled in groups of 3 or more (Figure 10).

Figure 10: Cycle Tourists by Group Size, 2004-08 \*1\*2

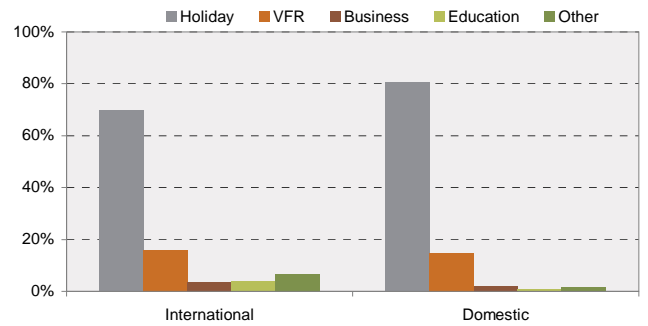


### What are the main purposes of travel of cycle tourists?

Cycle tourists are predominantly holiday travellers (Figure 11). Most (70%) of all international cycle tourists were on holiday, while 16% were visiting friends and relatives. Only 4% of business travellers went cycling. This compares to 51% of all international tourists on holiday, 28% visiting friends and relatives and 15% on business.

Eighty one percent of domestic cycle tourists were on holiday, 15% visiting friends and relatives and 2% were on business. This compares to 40% of all domestic tourists on holiday, 30% visiting friends and relatives and 24% on business.

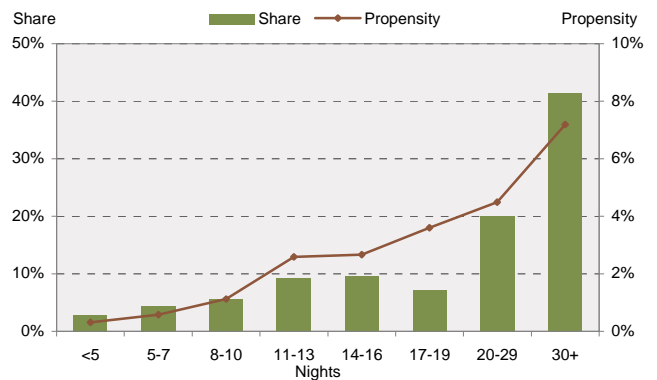
Figure 11: Cycle Tourists' Purpose of Travel, 2004-08 \*1\*2



### How long do international cycle tourists stay in New Zealand?

International cycle tourists typically stayed in New Zealand for long periods. Forty one percent of international cycle tourists stayed for more than a month while 20% stayed 20-29 nights. Cycling propensity increases with length of stay. Those staying for 30 or more nights had the highest propensity to cycle (7%) (Figure 12).

Figure 12: International Cycle Tourists' Length of Stay, 2004-08 \*1

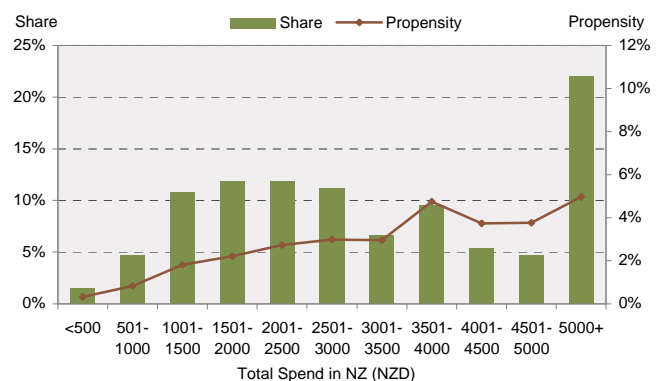


### How much do international cycle tourists spend on their trip in New Zealand?

International cycle tourists spent significantly more on average per trip (\$3,895) than all international tourists (\$2,662). In terms of average daily expenditure, cycle tourists spent less (\$86 per night) than all international tourists (\$127 per night). This is linked to their longer length of stay.

Propensity to cycle tended to be higher for those who spent more (Figure 13). For those who spent more than \$5,000, the propensity was highest at 5%.

Figure 13: International Cycle Tourists' Spend, 2004-08 \*1



All references to spend exclude international airfares

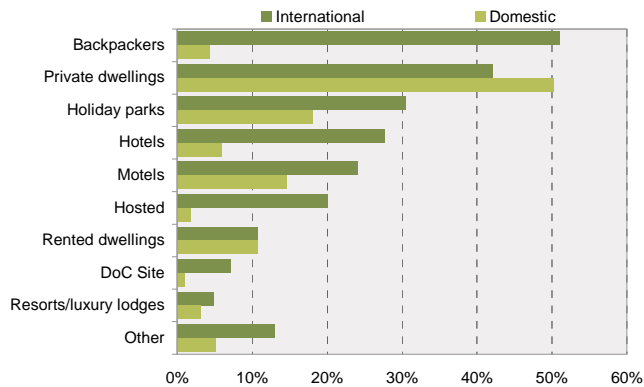
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### What accommodation types do international cycle tourists use?

Half of all international cycle tourists stayed in backpackers (51% stay in a backpackers at some point on their trip), followed by private dwellings (42%), holiday parks (30%), hotels (28%), motels (24%) and hosted accommodation (20%) (Figure 14).

Domestic cycle tourists stayed in private dwellings (50%), followed by holiday parks (18%), motels (15%) and rented dwellings (11%).

Figure 14: Accommodation Used by Cycle Tourists, 2004-08 <sup>\*1</sup>



### What other activities do cycle tourists do?

International cycle tourists also participated in a variety of other outdoor activities, such as walking/trekking, sightseeing, volcanic/geothermal attractions and boating. They also undertook more urban activities such as dining, shopping, museums/galleries, gardens, entertainment and heritage attractions.

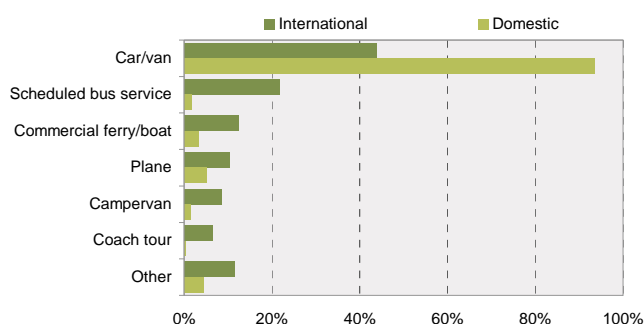
Domestic cycle tourists participated in similar activities, including walking/trekking, sightseeing, swimming and other scenic, natural and water attractions. Dining, shopping and visiting friends and relatives were also popular activities for domestic cycle tourists.

### What transport do cycle tourists use?

Almost half (44%) of all international cycle tourists used a car or van to get to the region where they cycled (Figure 15). This was followed by scheduled bus service (22%), commercial ferry/boat (12%) and plane (10%).

Domestic tourists mainly used a car or van on their cycling trips, with 94% using this form of transport. A small proportion (5%) travelled by plane.

Figure 15: Transport Used by Cycle Tourists, 2004-08 <sup>\*1\*2</sup>



### How satisfied are international cycling tourists?

International visitors who went mountain biking were more satisfied with this activity than those who went road cycling (Figure 16).

Overall, international visitors were moderately satisfied with road cycling, with an average satisfaction rating of 7.1 out of 10. The most satisfied road cyclists were from Australia and USA/Canada (7.6 and 7.4 respectively), while Asian visitors were the least satisfied with road cycling (6.1). Satisfaction with road cycling was below the average satisfaction of all international tourists (8.2).

International visitors were highly satisfied with their mountain biking experience (8.4 out of 10). Visitors from UK/Ireland and Australia were most satisfied with mountain biking (8.8 and 8.7) while European visitors were least satisfied (7.4). Satisfaction with mountain biking is higher than all international tourists average satisfaction rating (8.2).

Figure 16: Satisfaction of International Cycle Tourists, 2006-08 <sup>\*3</sup>

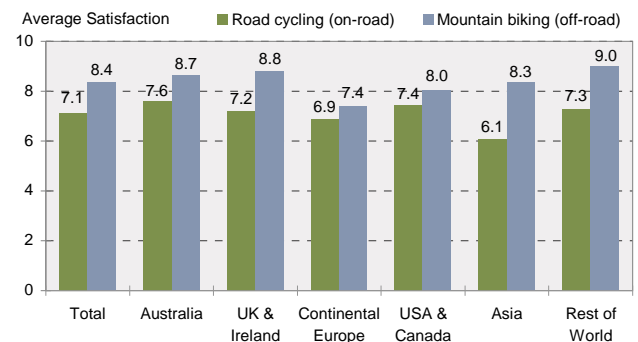


Table 1: Trends in Cycle Tourism, 2004-2008 <sup>\*1\*2</sup>

KEY INDICATORS	2004	2005	2006	2007	2008
<b>Cycle tourists</b>					
Total	345,000	232,400	234,400	294,600	356,900
International	58,800	59,400	54,100	55,000	42,100
Domestic	286,200	172,900	180,200	239,500	314,900

Data is sourced from the IVS<sup>1</sup> and DTS<sup>2</sup>. Because of sample errors, data may exhibit volatility. Therefore readers should interpret the results with caution and place greater emphasis on general trends.

Table 2: Cycle Tourists by Key Regions and Source Markets 2004-08 <sup>\*1\*2</sup>

Top 5 Destination Regions	Auckland	Rotorua	Canterbury	Hurunui	Lake Taupo	Total
International	7,500	5,500	7,900	3,500	4,000	53,900
Domestic	24,200	25,700	19,500	16,800	15,200	238,700
Total	31,700	31,300	27,400	20,300	19,100	292,600
% Share	11%	11%	9%	7%	7%	100%

Top 5 International Source Markets	United Kingdom	Australia	United States	Germany	Netherlands	Total
Tourists	13,000	12,300	5,800	3,700	2,800	53,900
% Share	24%	23%	11%	7%	5%	100%

Top 5 Domestic Source Markets	Auckland	Canterbury	Wellington	Otago	Waikato	Total
Tourists	71,900	41,500	34,300	24,200	21,600	238,700
% Share	30%	17%	14%	10%	9%	100%

#### DATA SOURCES

<sup>1</sup> IVS: International Visitor Survey, [www.tourismresearch.govt.nz/ivs](http://www.tourismresearch.govt.nz/ivs)

<sup>2</sup> DTS: Domestic Travel Survey, [www.tourismresearch.govt.nz/dts](http://www.tourismresearch.govt.nz/dts)

<sup>3</sup> RVM: Regional Visitor Monitor, [www.tourismresearch.govt.nz/rvm](http://www.tourismresearch.govt.nz/rvm)

Note: Due to low sample sizes, the data for Figures 2-17 have been combined for 2006-2008 or 2004-2008, as indicated.

This report is available on [www.tourismresearch.govt.nz/actprofiles](http://www.tourismresearch.govt.nz/actprofiles).

#### IMAGE CREDITS

Wellington Willis St. (Positively Wellington Tourism), [www.WellingtonNZ.com](http://www.WellingtonNZ.com)

Cardrona Ski Field, [www.cardrona.com](http://www.cardrona.com)

Southern Traverse (Michael Jacques), [www.karapoti.co.nz](http://www.karapoti.co.nz)

Wai-O-Tapu Champagne Pool (Destination Rotorua), [www.rotoruaNZ.com](http://www.rotoruaNZ.com)

Lake Taupo Lodge, [www.laketapuolodge.co.nz](http://www.laketapuolodge.co.nz)