Behavioural based segmentation of international visitors – through a transport lens

Presentation for Transport Knowledge Conference
Inclusive Access Transport Outcome

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International visitors through a transport lens

• International tourism is New Zealand’s largest export industry.

• New Zealand is generally used as a ‘fly-drive destination’. This can put pressure on our infrastructure and the experience of international travellers in New Zealand.

The Transport outcomes framework and mode neutrality will shape the conference sub-themes:

- Inclusive access:
  Enabling all people to participate in society through access to social and economic opportunities, such as work, education, and healthcare.

- Healthy and safe people:
  Protecting people from transport-related injuries and harmful pollution, and making active travel an attractive option.

- Economic prosperity:
  Supporting economic activity via local, regional, and international connections, with efficient movements of people and products.

- Environmental sustainability:
  Transitioning to net zero carbon emissions, and maintaining or improving biodiversity, water quality, and air quality.

- Resilience and security:
  Mitigating and managing the risks from natural and human-made hazards, anticipating and adapting to emerging threats, and recovering effectively from disruptive events.
In 2015 there were eight mentions of tourism in the Government Policy Statement on Land Transport - by 2018, there were thirty-three.

Key Strategic Direction for Accessibility: Nationally important tourism connections safe, efficient, resilient and minimise greenhouse gas emissions

Better access to support tourism

Sustainable economic development of regions

Increase mode shift from private vehicle to walking, cycling and public transport

Organisational Objective: To provide a land transport system which meets the needs of international tourism and to minimise negative impacts from international tourism.
Discovery process

International visitor foundational insights

1. Transport focussed Segmentation of International Visitors
   - Finishing end of 2019

2. Enrichment of International Visitor segments using Paymark spend data
   - Finishing end of 2019

3. Qualitative Exploration of key segments
   - Finishing April 2020

Scoping to discover existing International Visitor insights

Completed April

Existing survey and data
Research Objectives

Drawing insight from multiple sources

- Visitor dispersal
- Understanding visitor flow
- Retaining liveable communities
- Improving safety
- Improving transport connections
- Encouraging public transport and active modes
- Research will deliver insights on…

Research will deliver insights on…
1. International visitor segmentation

Key dimensions

- Statistical analysis found key behavioural elements:
  - self-drive vs non-drive
  - mobility, ie, number of locations stayed

- Other differentiating factors:
  - purpose of visit
  - length of stay
  - mode of travel
International visitor transport based segmentation

- **Self drive 67%**
- **Non drive 26%**

 **Opportunity to influence**
- modes, journey, safety

 **Impact on**
- infrastructure-parking, congestion, roads

- **Extended stay – 4 months plus 2%**
- **Business / conference only trip 5%**

- **Low mobility (1-3 places) 37%**
- **High mobility (4+ places) 31%**
- **Low mobility (1-3 places) 14%**
- **High mobility (4+ places) 3%**

- **Holiday / business (13%)**
- **VFF (24%)**
- **VFF / Homebase (11%)**
- **Campervanners (6%)**
- **Shorter stay holiday (7%)**
- **Longer stay holiday (7%)**

**NOTES:**
- Base: Total Visitors n = 9172
International visitor segmentation outputs

- Segment profiles
- Itinerary & activities
- Safe journeys
- Transport and mode change
- Communications

(Waka Kotahi NZ transport agency)
International visitor segmentation outputs

Examples of initial IVS segmentation findings

- Dispersal of campervanners compared to low mobility visitors
- Non-driver high-mobility more likely to have different arrival and departure cities
- Those visiting friends and family are most prepared for driving
- High-mobility visitors most motivated by spectacular landscapes
2. Paymark enrichment

Key dimensions

- Paymark captures 75% of all electronic card payments and provides:
  - card origin
  - merchant
  - geographical data
- 3.5 million international visitors segmented
- Enriches with additional behavioral insights and illustrations of tourist flows
Paymark enrichment outputs

Segment profiles &

- Itinerary and visitor flows
- Spend
- Activities and accommodation
3. Qualitative exploration

Intercept interviews

- Key international visitor segments are being explored through qualitative intercept interviews
- This provides deep understanding of visitor needs, motivations and behaviour
Qualitative exploration outputs

NZTA Interviewers with Christine from Korea who is Instagram-ing around New Zealand with her Mum

- Itinerary and visitor flows
- Safety
- Mode choice
- Segment depth

&
There are many aspects of New Zealand roads affecting people’s sense of safety, these include:

- Pressure to travel at 100km/hour on winding roads
- Roundabouts / traffic circles, not always sure on direction or who goes first
- Other drivers following too closely
- Driving on left hand side
- Sometimes limited passing lanes
- Fewer median barriers
- Sometimes limited passing lanes

Examples of initial shoulder season findings
Actionable insights

Fusion of research

- Tailored presentations can be created for groups with specific interests, eg, Queenstown, mode shift, campervans
- Actionable insights will be used to:
  - inform transport infrastructure planning
  - understand dispersal, itineraries and visitor flows
  - input into safety programme
  - input into One Network Road Classification (ONCR)
  - encourage mode shift
  - target communications
  - retain liveable communities
  - inform destination management planning
  - responsible camping.
The International visitor behavioural segmentation will be ready for release in May 2020

For questions and further information please contact Carol Christie, Senior Insights Specialist at carol.christie@nzta.govt.nz