

# Behavioural based segmentation of international visitors – through a transport lens

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Presentation for Transport Knowledge Conference  
Inclusive Access Transport Outcome

# 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:



# Government Policy Statement on Land Transport

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

**Scoping to discover existing International Visitor insights**

Completed April

**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**

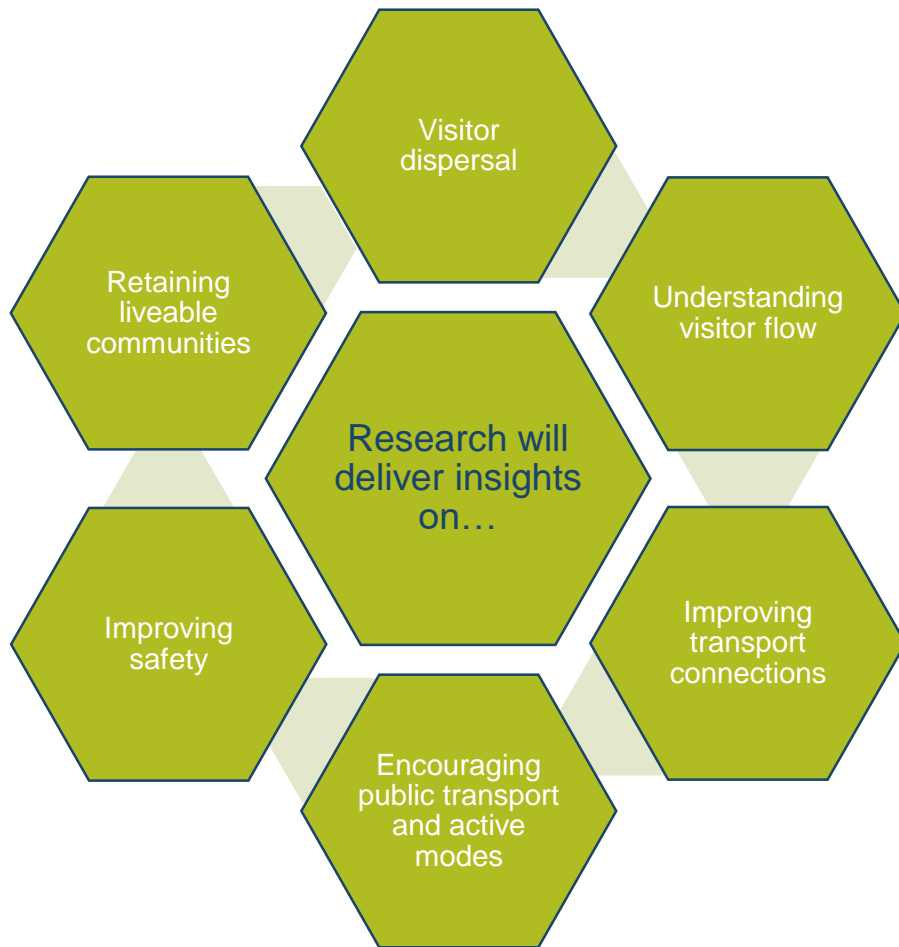
Finishing April 2020

Existing survey and data



# Research Objectives

Drawing insight from multiple sources



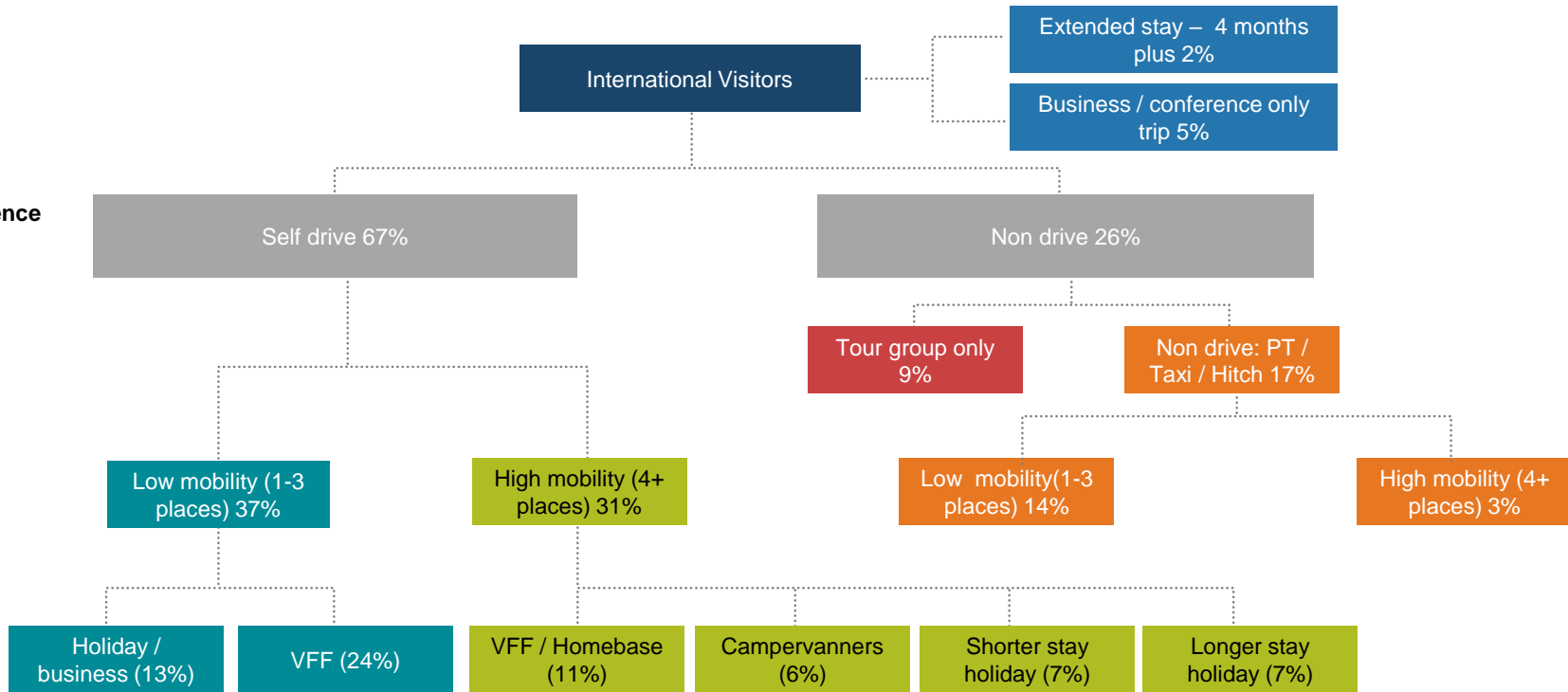
# 1. International visitor segmentation

## 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

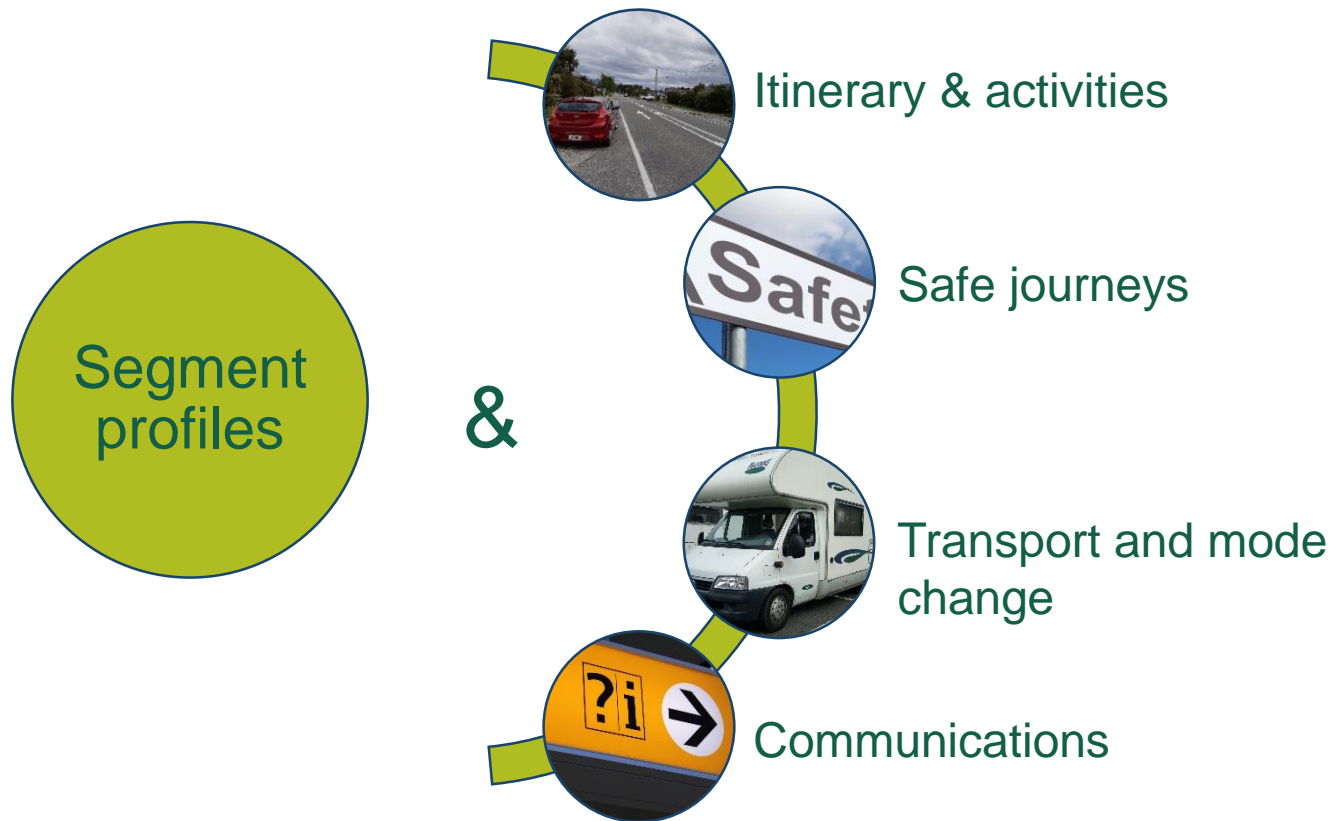


Opportunity to **influence** behaviour – modes, journey, safety

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

NOTES:  
 Base: Total Visitors n = 9172  
 Source: International Visitors Survey - Ministry of Business, Innovation and Employment, Jul-18 to Jun-19

# International visitor segmentation outputs





# 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

Self Drive high-mobility  
Campervanners



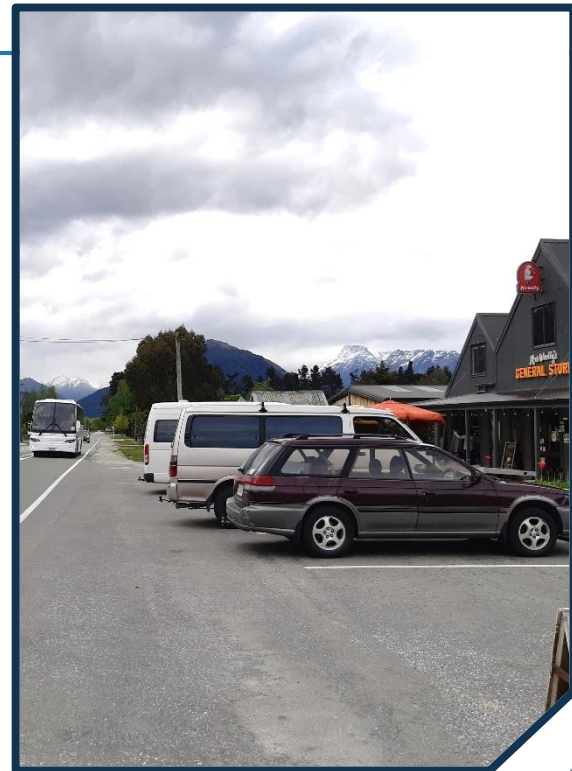
Self Drive low-mobility Holiday /  
Business



## 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



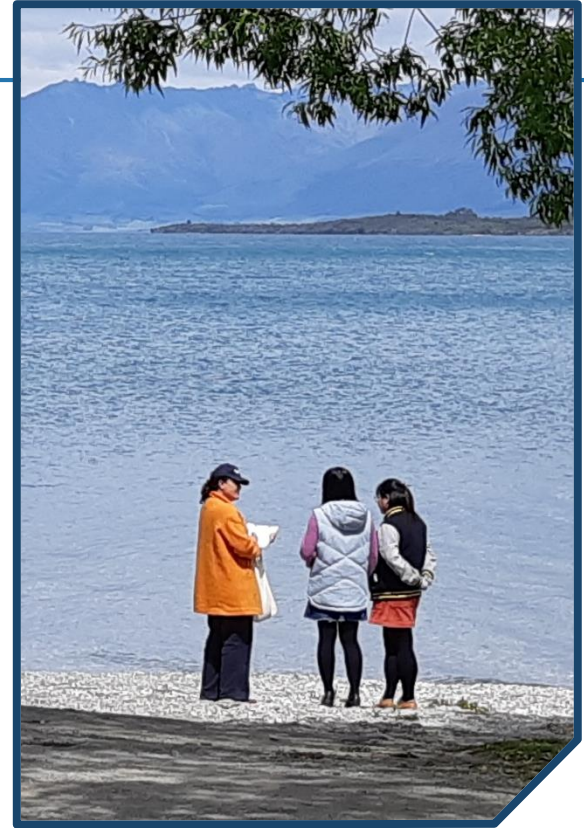
# Paymark enrichment outputs



# 3. Qualitative exploration

## Intercept interviews

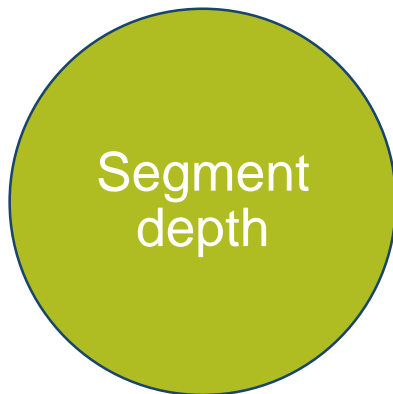
- Key international visitor segments are being explored through qualitative intercept interviews
- This provides deep understanding of visitor needs, motivations and behaviour



# Qualitative exploration outputs



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



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# Qualitative exploration outputs

## Examples of initial shoulder season findings

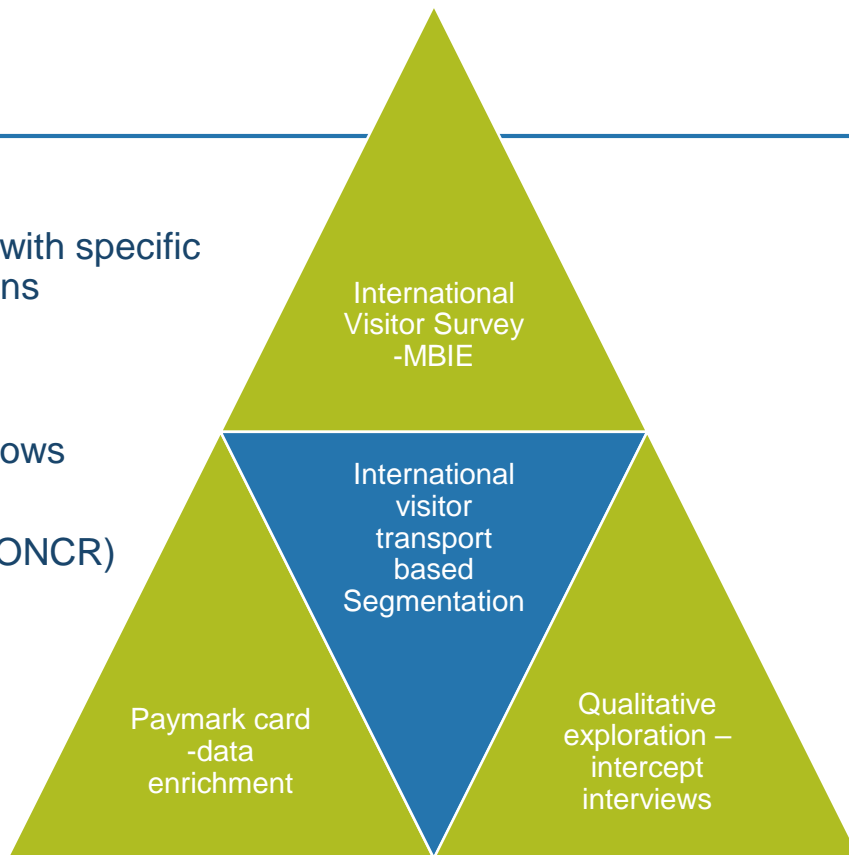
- There are many aspects of New Zealand roads affecting people's sense of safety, these include:



# 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**