

AUSTRALIA

Visitors & Market Insights

July 2024



Abel Tasman National Park
Nelson Tasman



100% PURE
NEW ZEALAND

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 Australia market arrival insights

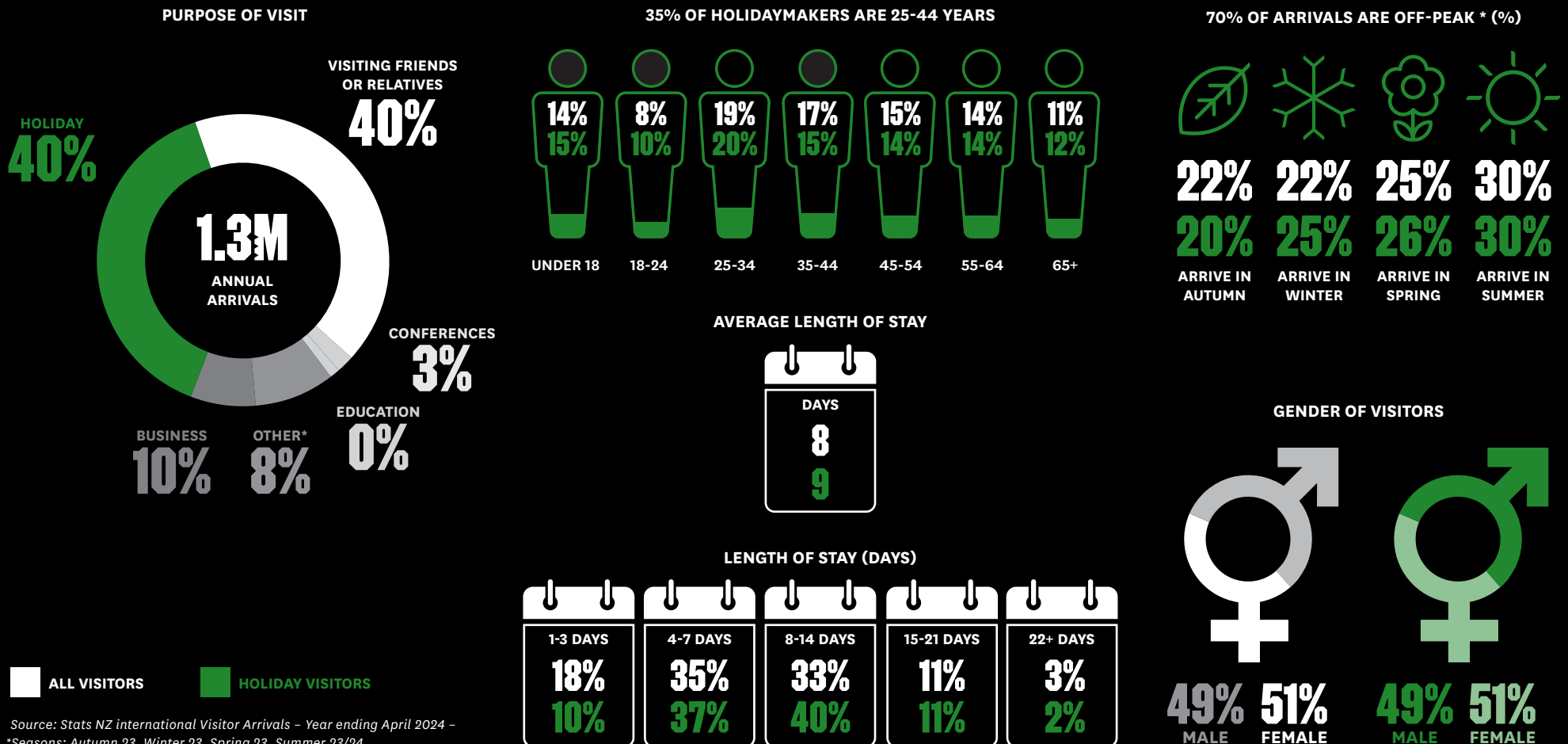


AUSTRALIA

TRAVELLER INSIGHTS



Australia is New Zealand's largest visitor market. Last year, 1.3 million Australians (44% of all arrivals) visited New Zealand, with 517,000 (40%) being holiday visitors.



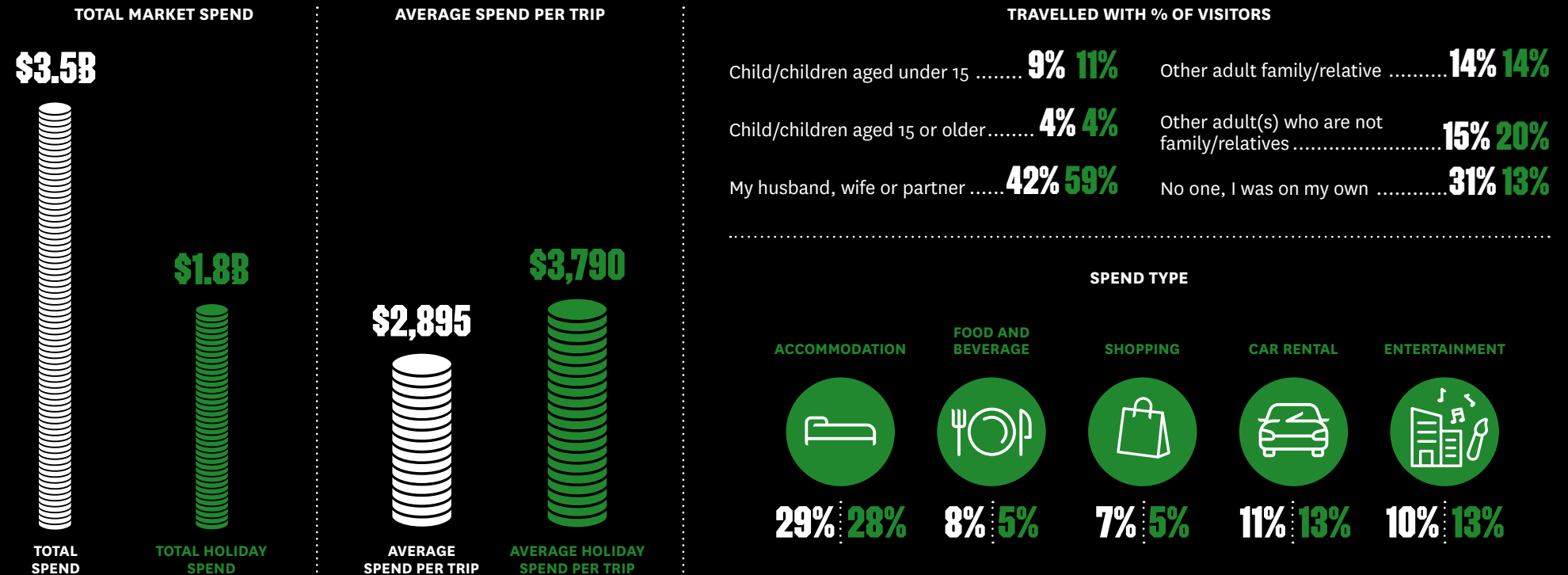
Source: Stats NZ international Visitor Arrivals - Year ending April 2024 -
 *Seasons: Autumn 23, Winter 23, Spring 23, Summer 23/24

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VISITOR SNAPSHOT



Australian visitors spent \$3.5 billion in New Zealand, with \$1.8 billion in spend by holidaymakers. The average spend per trip was \$2,895, rising to \$3,790 for holiday visitors. Nearly 30% of spending was on accommodation, and visitors were most likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

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

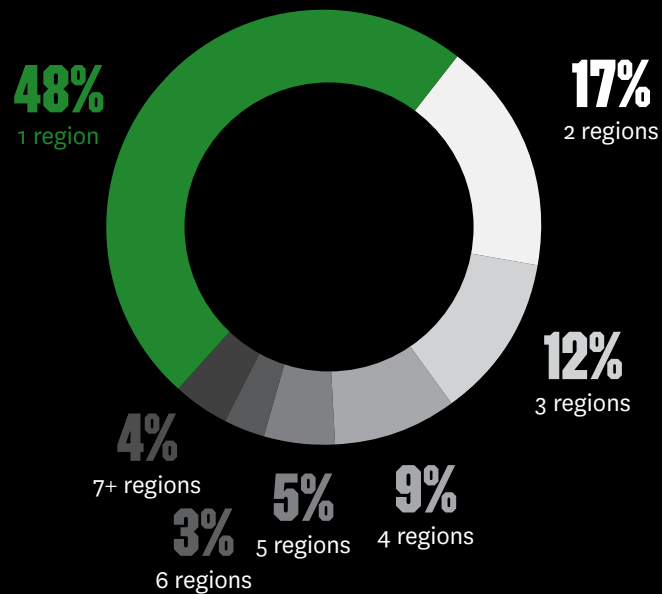
AUSTRALIA

TRAVELLER INSIGHTS

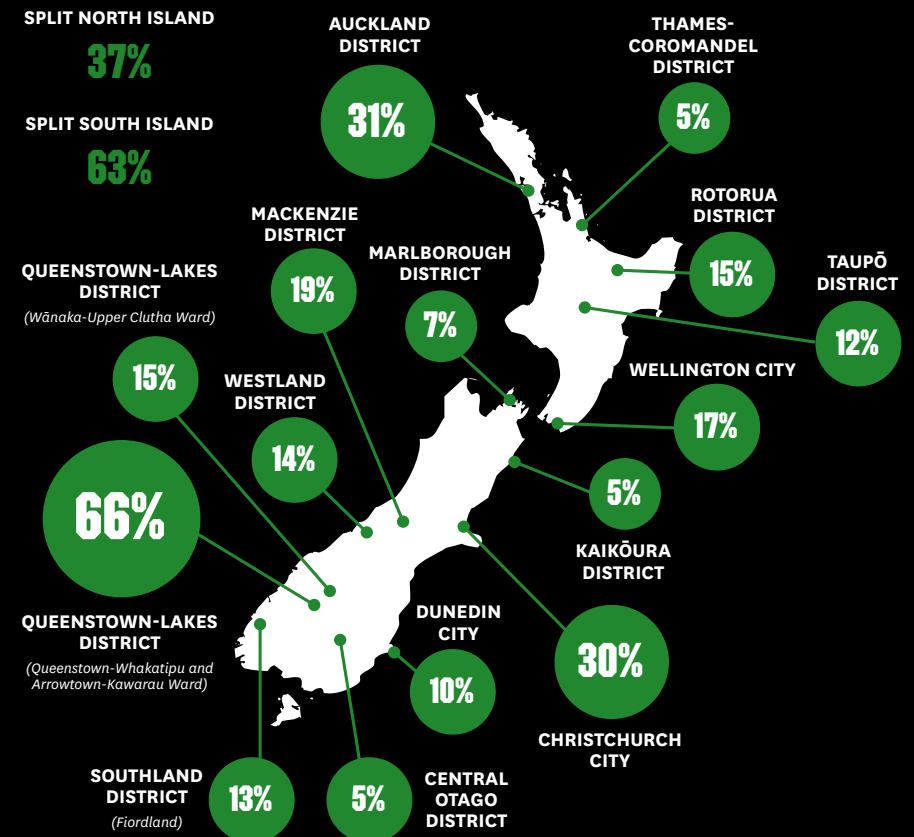


Australian holiday visitors spent the majority of their time in the South Island (63% of nights), while 37% of nights were spent in the North Island. Among them, 22% visited four or more regions, with Queenstown being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



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

AUSTRALIA

TRAVELLER INSIGHTS

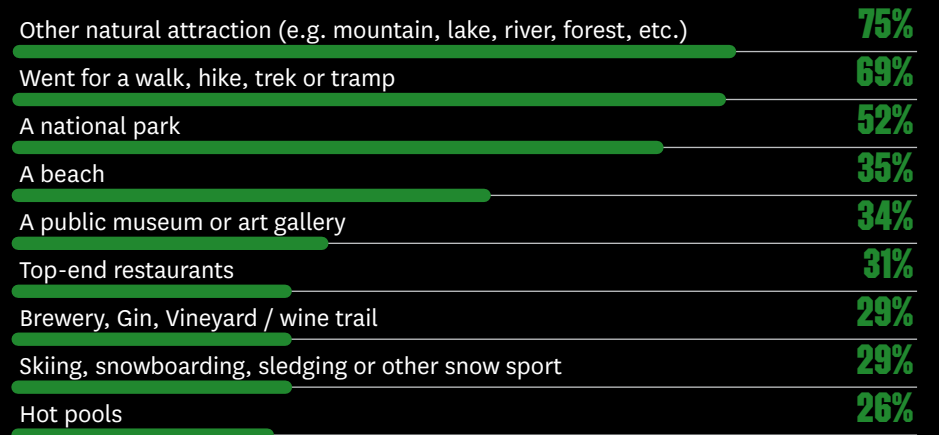


Most visitors favoured natural attractions like mountains and lakes, hiking, and national parks, with significant participation in beach visits and museum/art gallery tours. Nearly 30% of visitors engaged in snow sports during the off-peak season.

TOP ACTIVITIES ENJOYED BY AUSTRALIANS IN NEW ZEALAND - SUMMER



TOP ACTIVITIES ENJOYED BY AUSTRALIANS IN NEW ZEALAND - OFF-PEAK (MAR - NOV)



80%

Walk, hike, trek or tramp



79%

Other natural attractions



72%

Visiting a national park



75%

Other natural attractions



69%

Walk, hike, trek or tramp



52%

Visiting a national park

AUSTRALIA

TRAVELLER INSIGHTS



Most visitors opted for hotels or booked houses or apartments online. Rental cars and taxis/shuttles were popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



42%

Hotel



42%

House/Apartment booked online (AirBnb etc)



23%

Motel, Motor Inn or Serviced Apartment



13%

Family or friends



12%

Luxury accommodation



10%

Backpackers



7%

Paid camping ground/holiday park



6%

Youth hostel, YMCA



6%

Free camping

MODES OF TRANSPORT



50%

Rental car



37%

Taxi/shuttle



22%

Uber or other app based



17%

Local bus service



12%

Tour bus



9%

Bus service between towns/cities



9%

Plane (within New Zealand)



8%

Ferries



7%

Ferry between North and South Islands

OUR AUDIENCES

Our Active Considerers

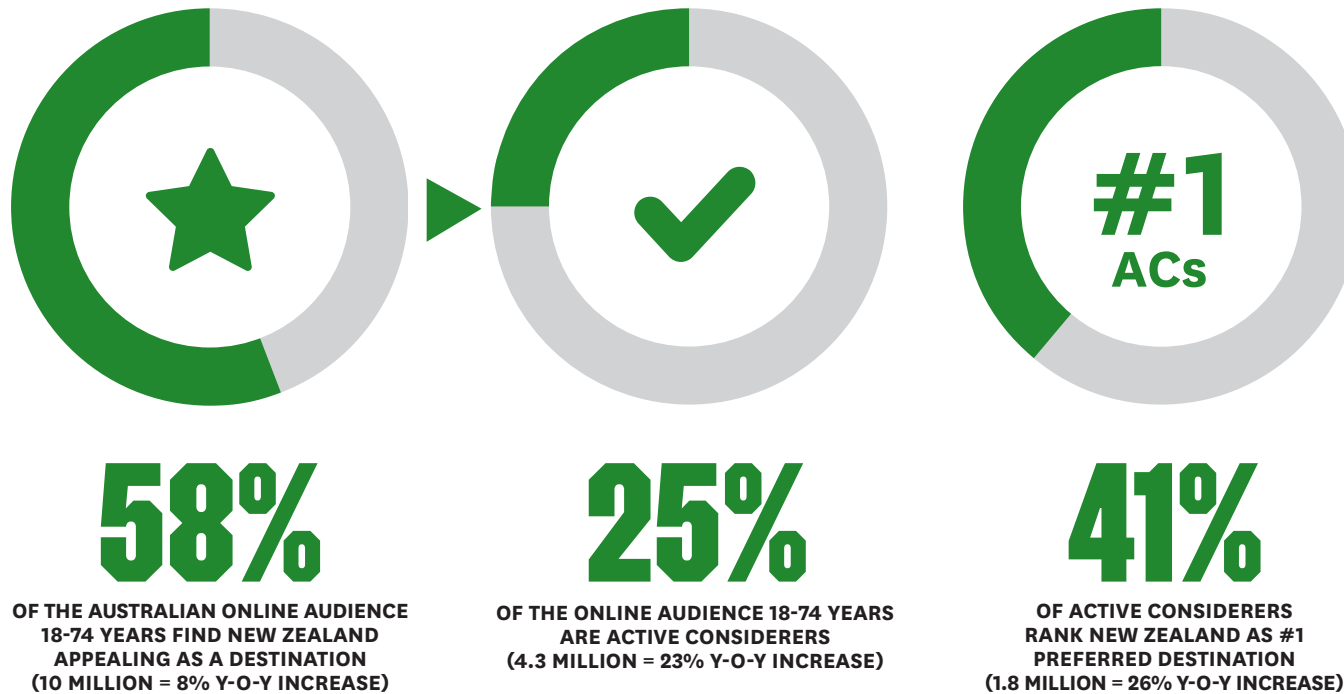
Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three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

AUSTRALIA

ACTIVE CONSIDERERS

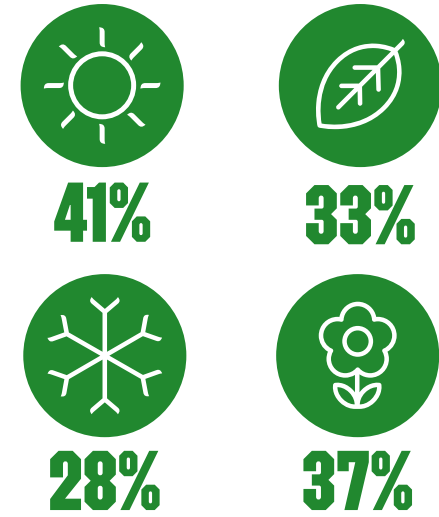


There are around 4.3 million Active Considerers in Australia, with 41% identifying New Zealand as their top choice of destination to travel to.



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

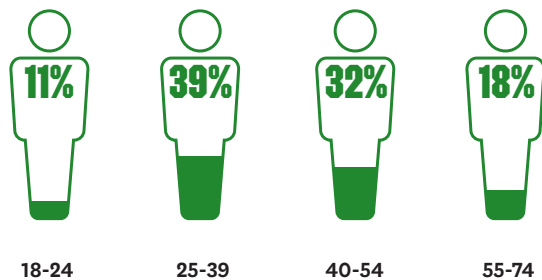


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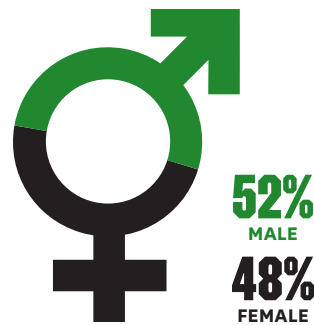
ACTIVE CONSIDERERS

Active Considerers skew 25-39, largely reside in New South Wales and Victoria and nearly 1 in 4 have a household income of over AUD \$140,000.

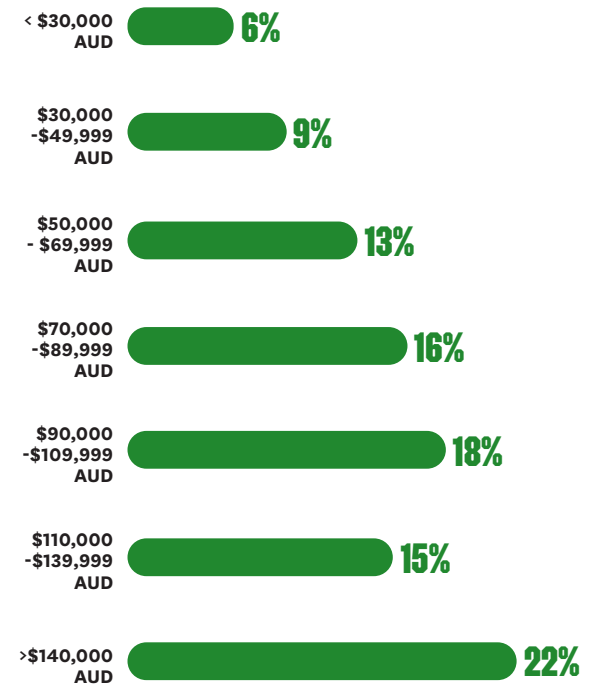
AGE SEGMENT OF ACTIVE CONSIDERERS



GENDER OF ACS



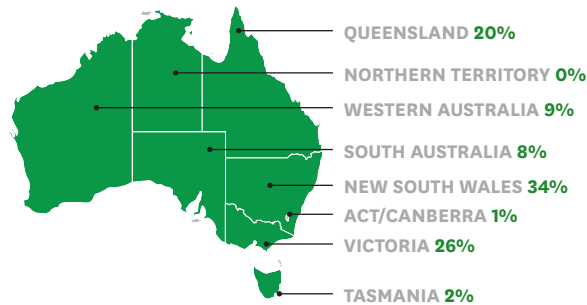
ANNUAL HOUSEHOLD INCOME SPREAD - ACS



OVER 2/3 ACS IN AUSTRALIA ARE BETWEEN

25-54

ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEABOARD



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

AUSTRALIA

ACTIVE CONSIDERERS



Among Australian Active Considerers, New Zealand is most associated with outdoor adventures, stunning landscapes, safety, cleanliness, family suitability, diverse tourist offerings, friendly locals and cultural ties to the land.

BRAND ASSOCIATIONS



OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES
83%



SPECTACULAR NATURAL
LANDSCAPES AND SCENERY
82%



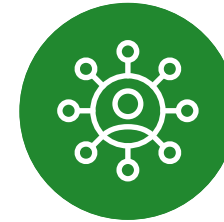
I WOULD FEEL SAFE TRAVELLING
AROUND THIS DESTINATION
80%



THE ENVIRONMENT THERE IS
CLEAN AND UNPOLLUTED
79%



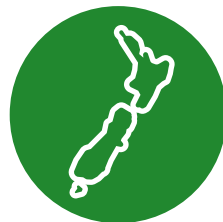
IDEAL FOR A FAMILY
HOLIDAY
78%



OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES
78%



THE LOCALS ARE FRIENDLY AND
WELCOMING
77%



A DESTINATION WHERE THE
PEOPLE HAVE A SPECIAL
RELATIONSHIP WITH THE LAND
77%



IDEAL FOR HAVING FUN AND
ENJOYING YOURSELF
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

AUSTRALIA

ACTIVE CONSIDERERS



New Zealand's beautiful landscapes, nature, enjoyment and relaxation are key reasons to visit.

REASONS TO VISIT NEW ZEALAND



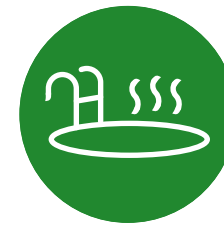
TO EXPERIENCE BEAUTIFUL
LANDSCAPES/SCENERY

58%



TO HAVE FUN & ENJOY
MYSELF

52%



TO FEEL RELAXED AND
REFRESHED

50%



TO LEARN & EXPLORE
NEW THINGS

47%



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

40%



TO GET IN TOUCH WITH NATURE

39%



TO FEEL A SENSE OF
ADVENTURE

37%



TO INTERACT WITH PEOPLE OF A
DIFFERENT CULTURE OR LIFESTYLE

31%



TO CONNECT AND SPEND TIME WITH
IMPORTANT PEOPLE IN MY LIFE

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

AUSTRALIA

ACTIVE CONSIDERERS



Active Considerers highly value the opportunity to have wildlife encounters, taste local cuisine, explore towns, participate in nature activities, and engage with Māori culture.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



WILDLIFE EXPERIENCES
91%



TRYING LOCAL CUISINE
90%



EXPERIENCING LOCAL TOWNS
90%



BEACHES & COASTS
90%



VISITING NATIONAL PARKS, NATURE RESERVES OR NATIVE FORESTS
90%



HISTORICAL SITES AND HERITAGE SITES
90%



LAKES, RIVERS AND WATERFALLS
89%



MOUNTAINS & ALPINE AREAS
88%



MAORI CULTURAL EXPERIENCES
88%

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

AUSTRALIA

ACTIVE CONSIDERERS



Key concerns and knowledge gaps for potential visitors include weather conditions, ease of transportation, travel distances in New Zealand, and recommendations for activities and attractions.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



WHAT THE WEATHER IS LIKE
42%



HOW EASY IT IS TO TRAVEL AROUND
34%



HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS
31%



WHAT/WHERE THE RECOMMENDED THINGS TO SEE AND DO ARE
29%



HOW SAFE IS IT FROM CRIME
27%



THE LENGTH OF TIME NEEDED TO EXPERIENCE NEW ZEALAND PROPERLY
26%



HOW WELCOMING THE LOCALS ARE
25%



WHERE I SHOULD GET INFORMATION ABOUT ORGANISING A HOLIDAY
23%



THE QUALITY AND VARIETY OF FOOD AND BEVERAGE OPTIONS
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

NGĀ MIHI