

NEW ZEALAND VISITOR PROFILE: AUSTRALIA

July 2022 - June 2023



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

Tourism New Zealand is New Zealand's national destination marketing organisation.

Market Approach

Tourism New Zealand focuses on shaping the high-quality 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, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

High Quality Visitors

Among those actively considering a New Zealand holiday, Tourism New Zealand further focuses on attracting High Quality Visitors.

These visitors are defined by the way they positively contribute to New Zealand's natural environment, culture, society and economy.

They are determined by their scope of activities, how they travel across seasons and regions, their environmental consciousness and engagement with our local culture and communities.

Mix of Markets

Our markets include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom

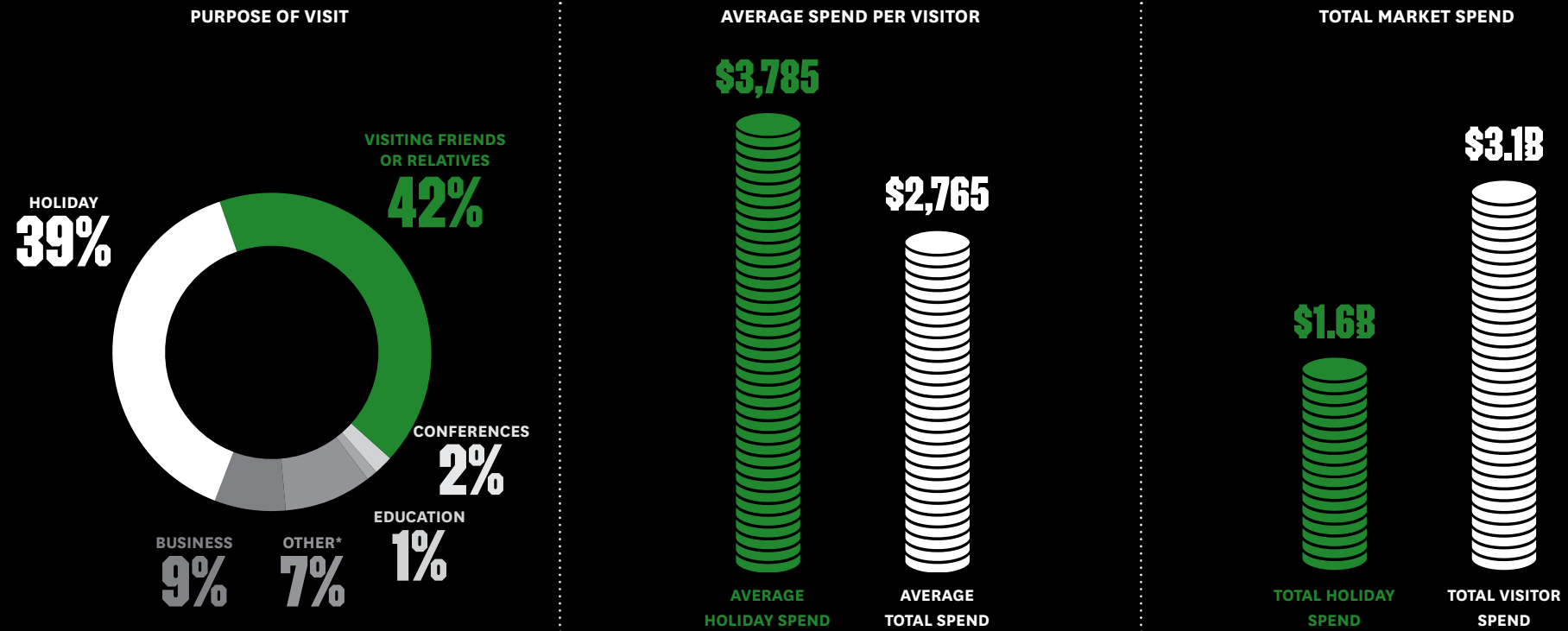


AUSTRALIA

VISITOR SNAPSHOT



Australia is New Zealand's largest visitor market. 1.2 M Australians (49% of all arrivals) arrive annually to New Zealand, and they spent 3.1B last year. 482K of these arrivals are holiday visitors (39%) who spent 1.6B last year



Source: Stats NZ International Visitor Arrivals July 2022 - June 2023
 MBIE International Visitor Survey (IVS) July 2022 - June 2023
 *Other or not stated

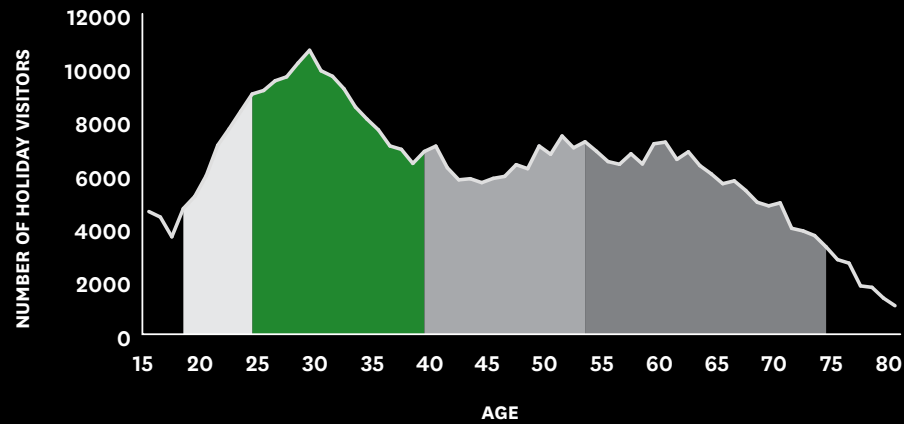
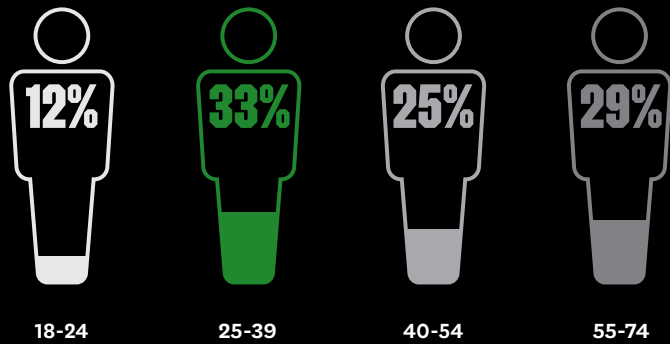
AUSTRALIA

VISITOR SNAPSHOT



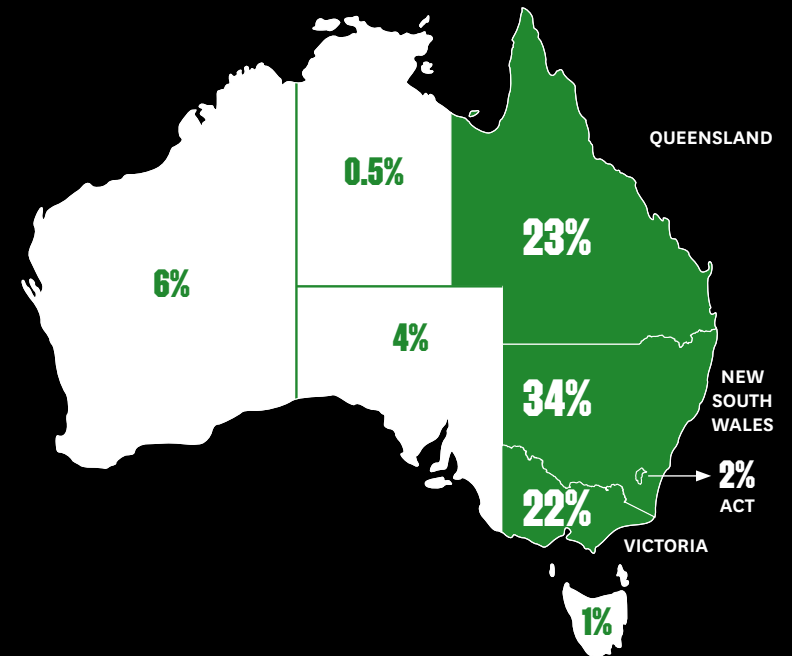
33% of Australian holiday arrivals are aged 25-39

AGE PROFILE OF HOLIDAY VISITORS



80% of Australian holiday visitors are from Queensland, NSW or Victoria

HOLIDAY ARRIVALS BY STATE



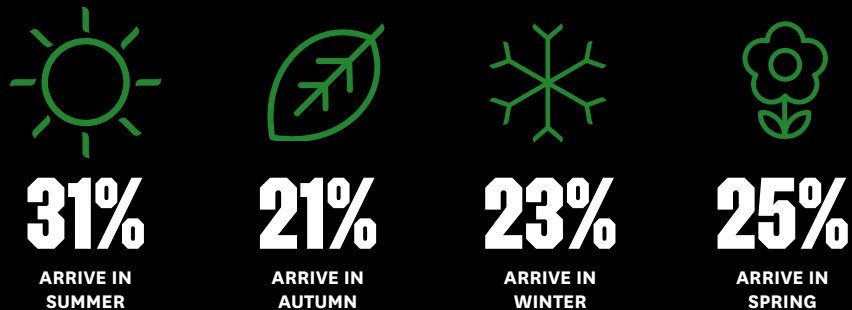
Source: Stats NZ International Visitor Arrivals July 2022 – June 2023
 MBIE International Visitor Survey (IVS) July 2022 – June 2023

AUSTRALIA

VISITOR SNAPSHOT



The distribution of Australian holiday arrivals throughout the year is uniform. They account for nearly half of the total holiday arrivals annually (46%), but their proportion increased to 67% during the winter months

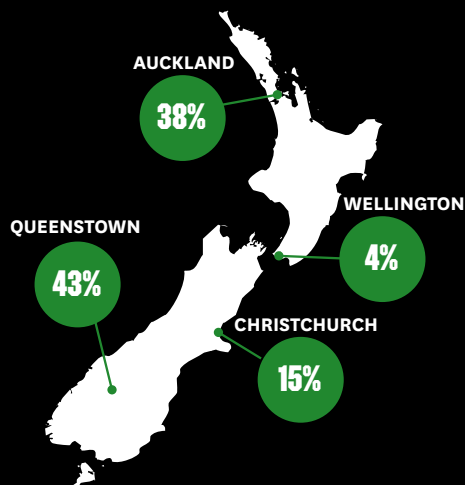
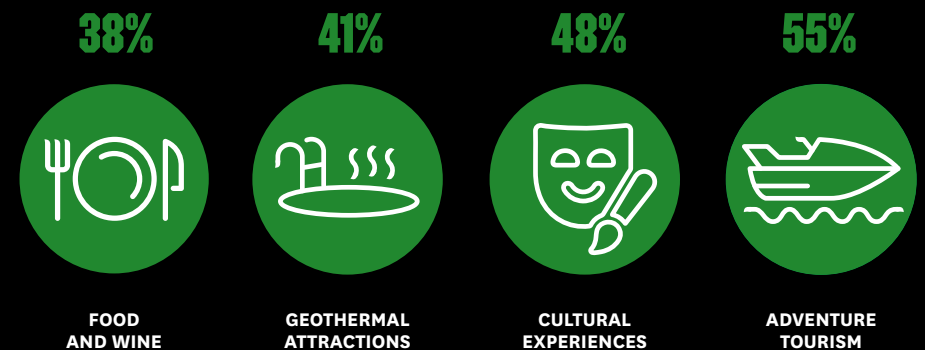


Whilst New Zealand is a short haul destination for Australians more than half stay longer than a week while on holiday

LENGTH OF STAY (DAYS)



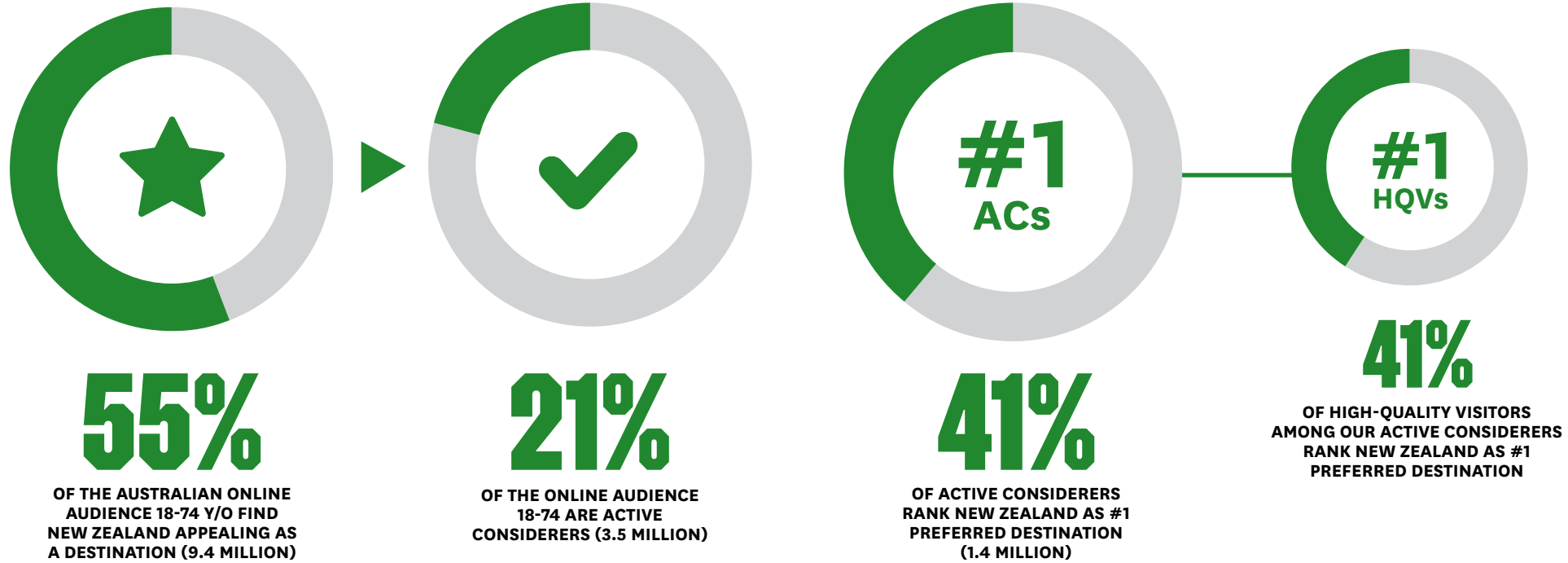
Popular Activities



Source: Stats NZ International Visitor Arrivals July 2022 – June 2023
MBIE International Visitor Survey (IVS) July 2022 – June 2023

AUSTRALIA

ACTIVE CONSIDERER METRICS



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. Within our AC pool, we further target High Quality Visitors (HQVs) for conversion to arrivals. They see more regions, are sustainability minded and have higher preference for and urgency to visit New Zealand.

Active Considerer Monitor data 6-month period ending June 2023



AUSTRALIA

ACTIVE CONSIDERERS AND HIGH QUALITY VISITORS – PROFILE

TOTAL ACTIVE CONSIDERERS

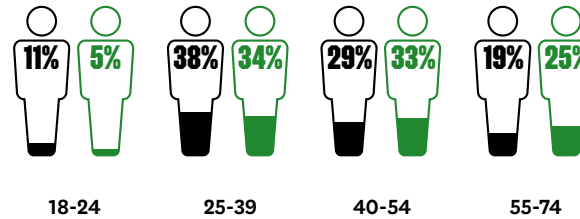
3.5M

APPROXIMATE NUMBER OF AUSTRALIAN ACTIVE CONSIDERERS

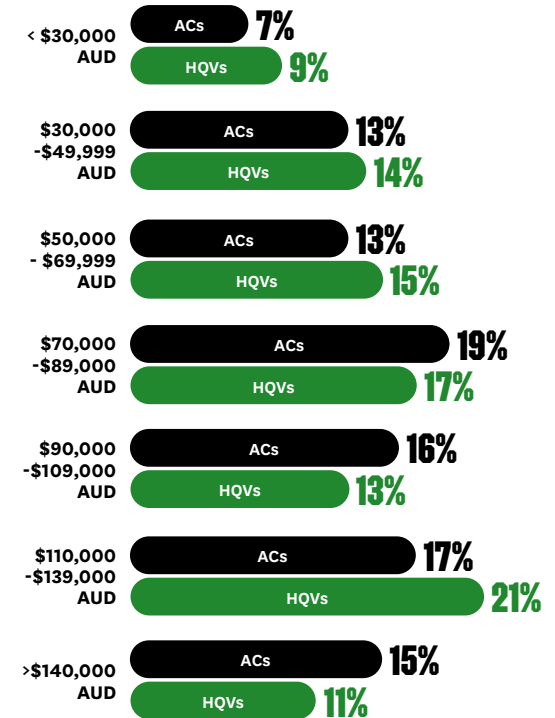
33%
OF THEM ARE HQVs (1.2M)



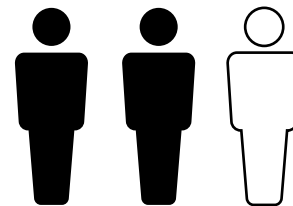
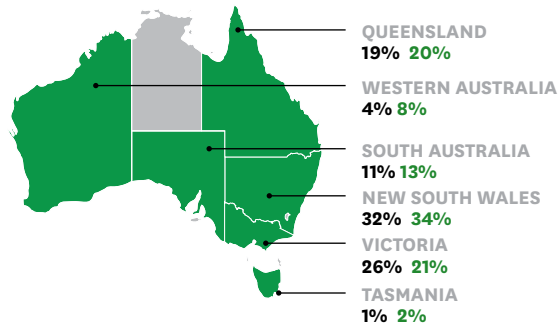
AGE SEGMENT OF ACTIVE CONSIDERERS



ANNUAL HOUSEHOLD INCOME SPREAD - ACs VS HQVs



ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEABOARD



AROUND 2/3 ACs IN AUSTRALIA ARE BETWEEN

25-54

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KEY

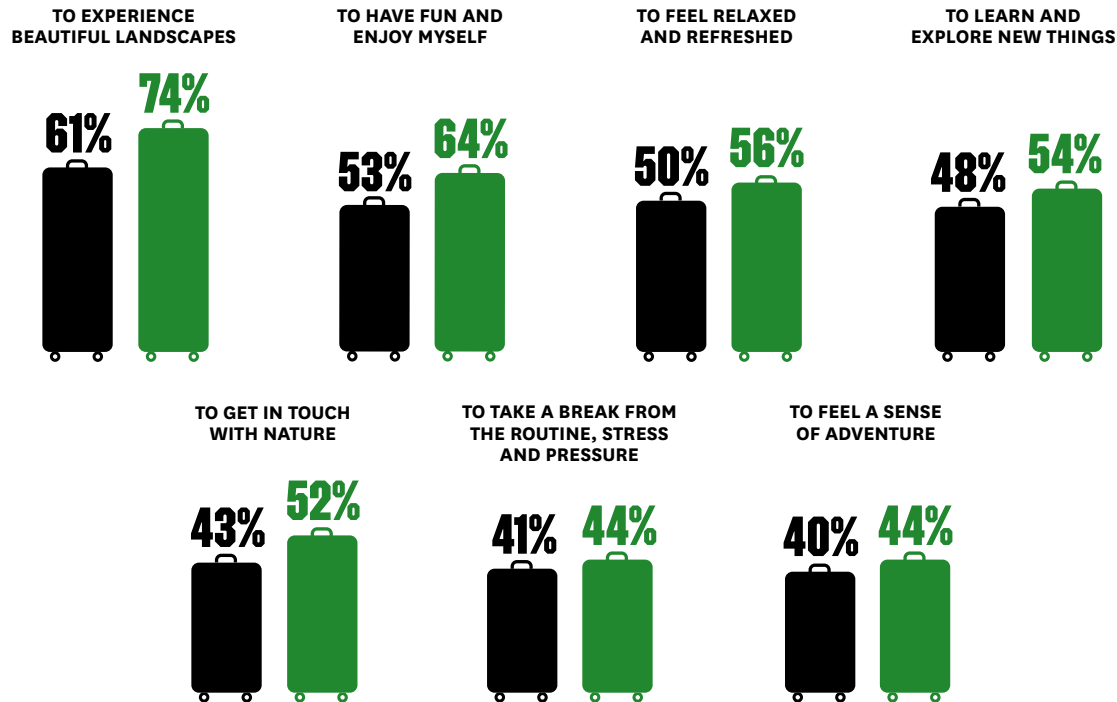
- Active Considerers
- High Quality Visitors

AUSTRALIA

ACTIVE CONSIDERERS AND HIGH QUALITY VISITORS – MOTIVATIONS AND BARRIERS



REASONS FOR VISITING NEW ZEALAND ON HOLIDAY



KNOWLEDGE GAPS



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Active Considerer Monitor data 6-month period ending June 2023

KEY

- Active Considerers
- High Quality Visitors

AUSTRALIA

ACTIVE CONSIDERERS AND HIGH QUALITY VISITORS – INTEREST IN ACTIVITIES



LOCAL CUISINE

93% **99%**



NATIVE FORESTS

92% **97%**



LAKES, RIVERS, WATERFALLS

90% **97%**



HISTORICAL AND HERITAGE SITES

91% **97%**



BEACHES AND COASTS

91% **96%**



MĀORI CULTURAL EXPERIENCES

88% **96%**



LOCAL TOWNS

91% **95%**



VISITING NATIONAL PARKS, NATURE RESERVES OR NATIVE FORESTS

90% **94%**



MOUNTAINS AND ALPINE AREAS

89% **94%**

KEY

- Active Considerers
- High Quality Visitors

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