

AUSTRALIA

Visitor & Market Insights

July 2026



**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 strategy is focused on driving year-round arrivals to support economic growth.

Market Approach

Tourism New Zealand (TNZ) 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

These are international holiday travellers, aged 18-74, who find New Zealand highly appealing. New Zealand is among their top 5 preferred destinations to visit, they have serious intentions to visit in the next 3 years, and they have a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverages 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.

Markets

The markets covered in our Snapshots include:

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



VISITOR INSIGHTS

International Visitor Arrivals

International arrivals sourced from Stats NZ; includes non-New Zealand or New Zealand residents living overseas who are arriving for a stay of less than 12 months

International Visitor Survey

International Visitor Survey (IVS) commissioned by the Ministry of Business, Innovation and Employment (MBIE); captures survey data from international visitors shortly after their trip to New Zealand



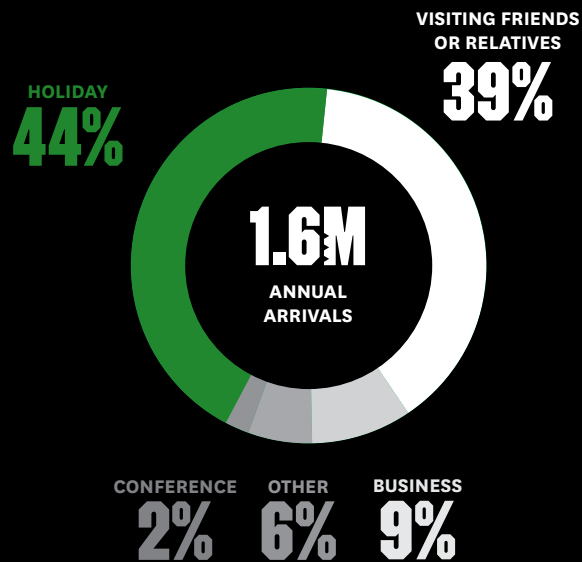
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VISITOR INSIGHTS | ARRIVALS

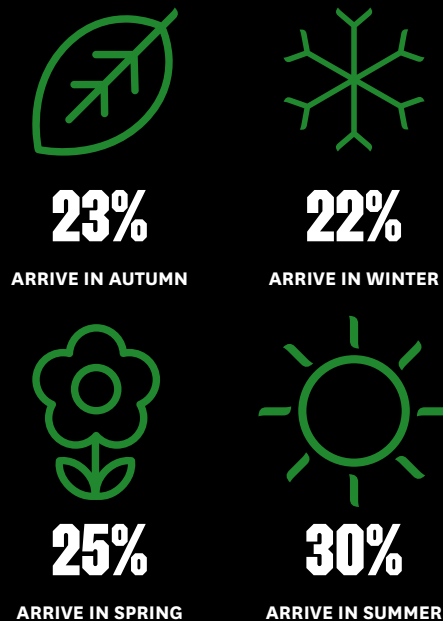


Australia is New Zealand's largest visitor market, with 1.6 million arrivals last year. Holiday visitors (44%) and those visiting friends and relatives (39%) make up the majority of arrivals. While arrivals peak in summer (30%), visitation remains relatively steady year-round

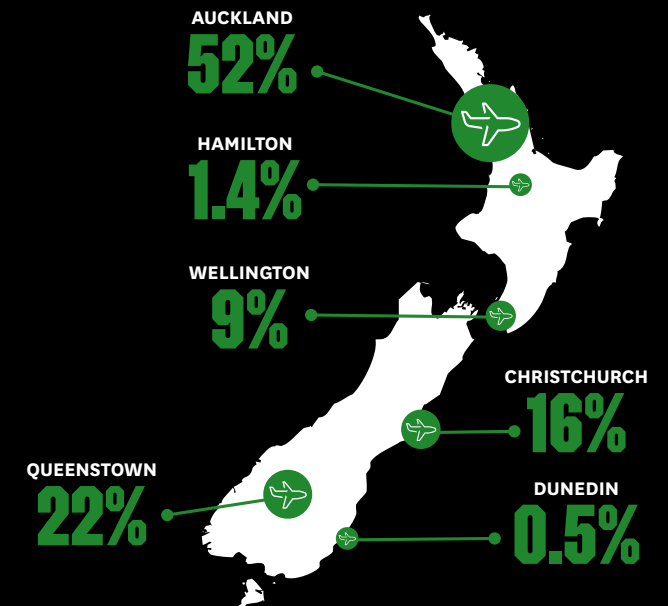
HOLIDAYS AND VISITING FRIENDS AND RELATIVES ARE THE MAIN TRAVEL DRIVERS



SUMMER SEES THE HIGHEST SHARE OF ARRIVALS



AUCKLAND AIRPORT IS THE MAIN GATEWAY WITH STRONG SOUTH ISLAND ACCESS VIA QUEENSTOWN



Source: Stats NZ International Visitor Arrivals – all arrivals – year ending March 2026

Seasons: Autumn 25/26 (April and May 2025 and March 2026), Winter 25 (June–August 2025), Spring 25 (September–November 2025), and Summer 25/26 (December 2025–February 2026).

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VISITOR INSIGHTS | WHO THESE HOLIDAYMAKERS ARE



Australian holiday travel skews toward couples (61%) taking extended holidays

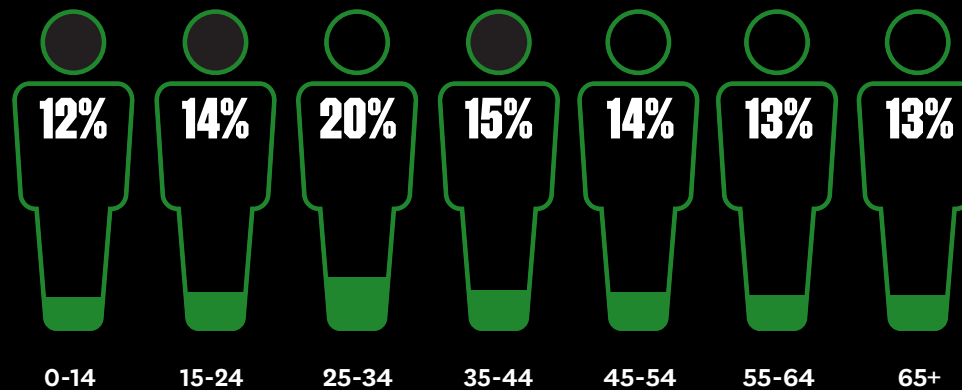
BALANCED REPRESENTATION ACROSS GENDERS



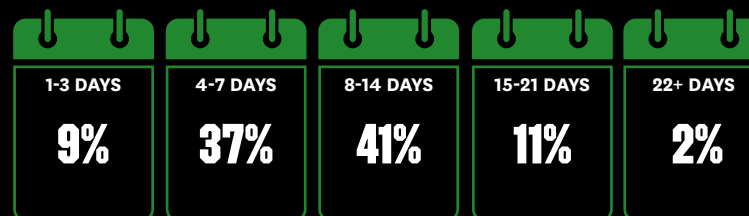
51%
FEMALE

49%
MALE

1/3 OF HOLIDAYMAKERS ARE AGED 25-44 YEARS



LENGTH OF STAY (DAYS)



AVERAGE LENGTH OF STAY



TRAVEL IS STRONGLY DRIVEN BY COUPLES AND FAMILIES



Less than 0.5% of visitors selected 'Another gender'

Sources: Stats NZ International Holiday Arrivals | Year Ending March 2026

International Visitor Survey | Year ending March 2026 | Holiday Visitors (Travel Party)

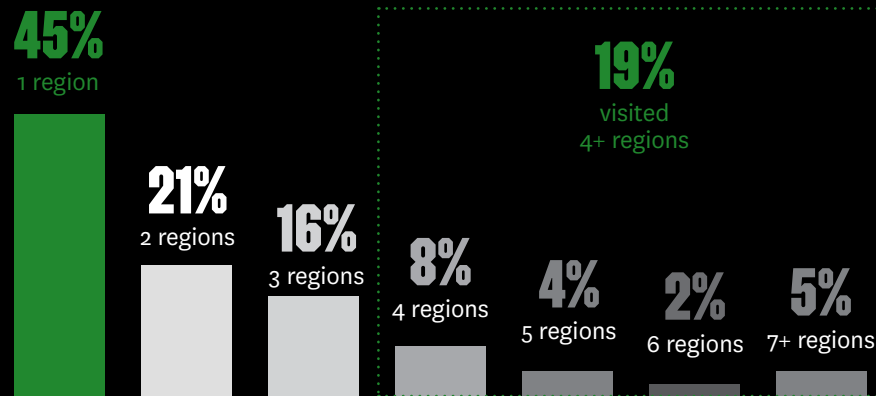
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VISITOR INSIGHTS | WHERE THEY GO



Australian holiday travel is heavily concentrated in the South Island (72%), particularly Queenstown, while 42% visit the north island

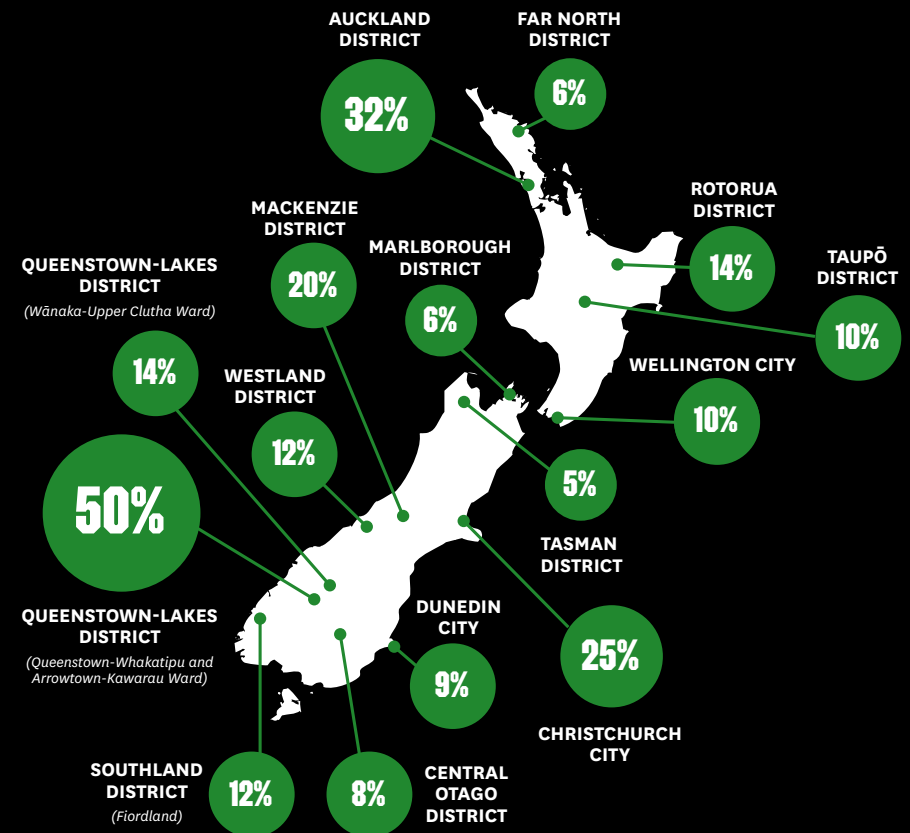
MOST HOLIDAYMAKERS EXPLORED ONE OR TWO REGIONS



SEVEN IN TEN HOLIDAY VISITORS EXPLORED THE SOUTH ISLAND



QUEENSTOWN IS THE MOST VISITED DESTINATION, FOLLOWED BY AUCKLAND AND CHRISTCHURCH

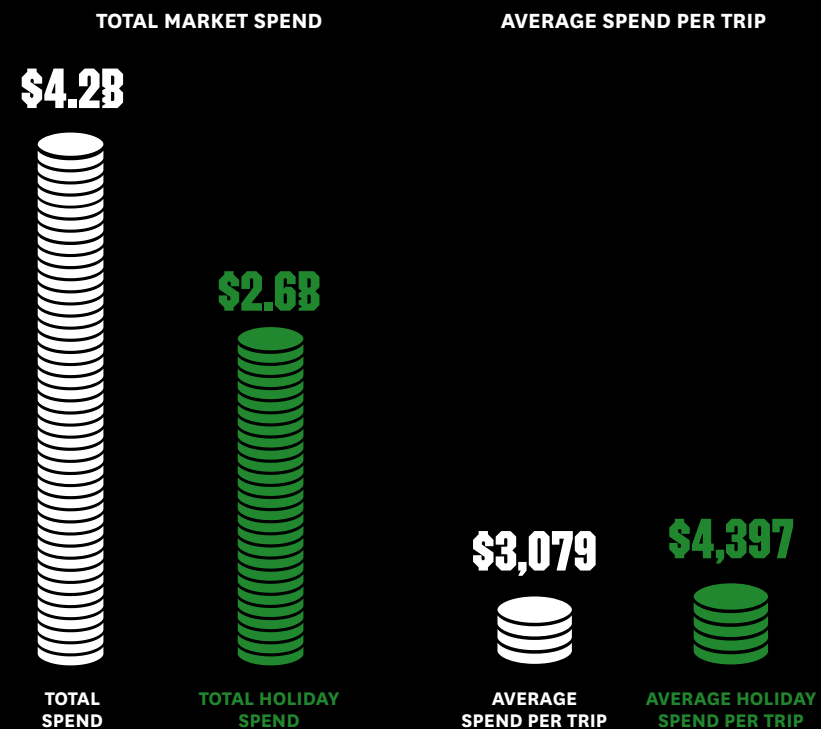


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VISITOR INSIGHTS | HOW MUCH THEY SPEND



Australian visitors spent NZ\$4.2 billion in New Zealand last year, with holidaymakers contributing over half (NZ\$2.6 billion). Holidaymakers also spend around 40% more per trip than the average Australian visitor



NEARLY 30% OF SPENDING WAS ON ACCOMMODATION

ACCOMMODATION



FOOD AND BEVERAGE



SHOPPING



CAR RENTAL



ENTERTAINMENT



ALL VISITORS HOLIDAY VISITORS

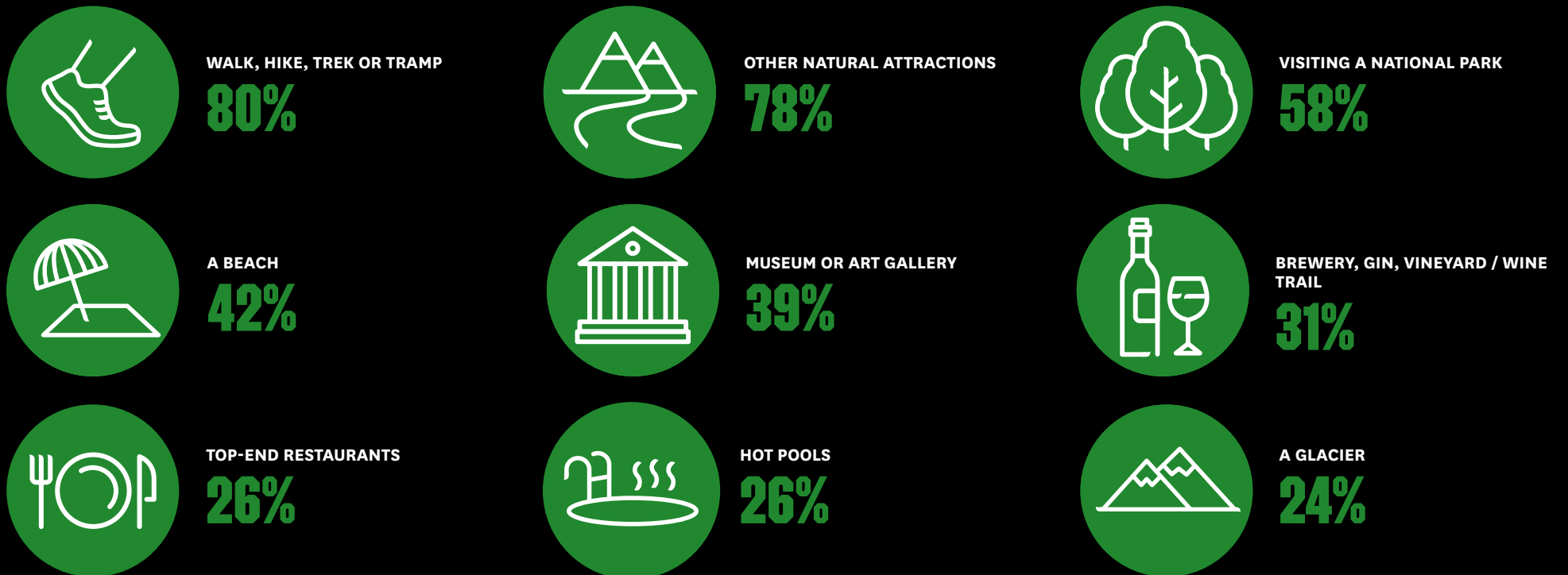
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VISITOR INSIGHTS | WHAT THEY DO



New Zealand's natural landscapes drive Australian visitation, while cultural attractions and food and wine experiences further enhance the appeal

TOP ACTIVITIES ENJOYED BY AUSTRALIANS ON HOLIDAY IN NEW ZEALAND



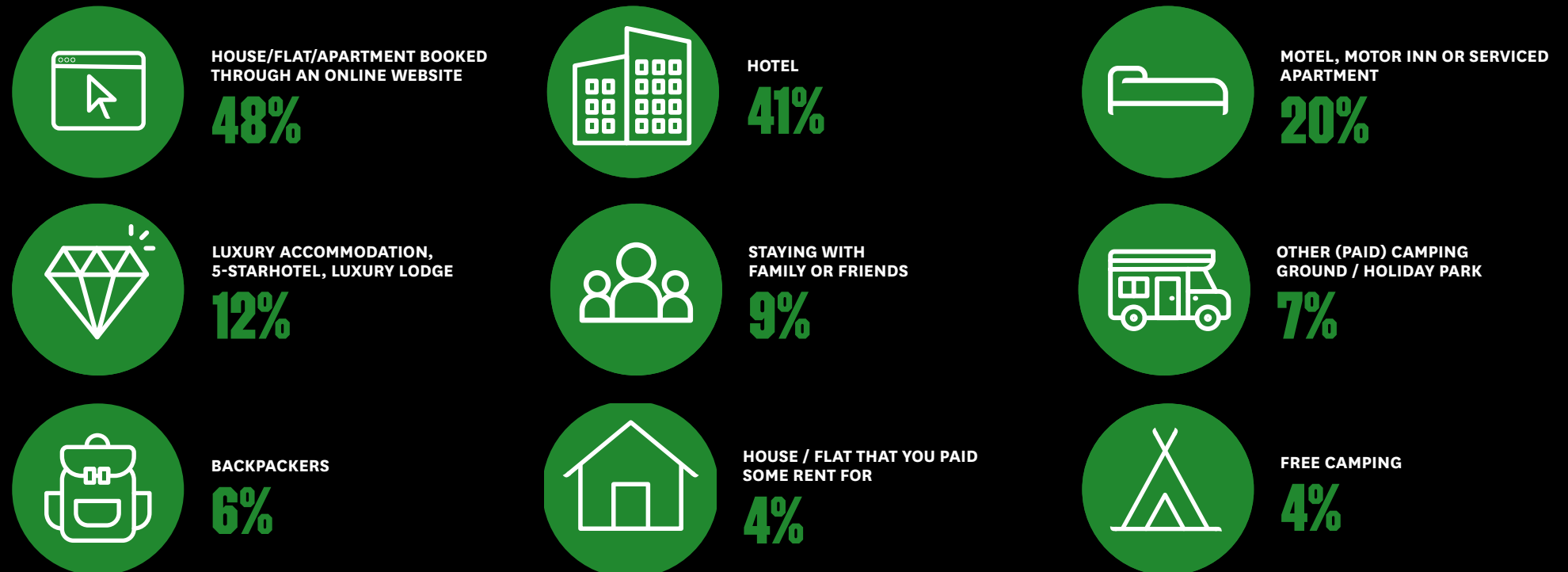
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VISITOR INSIGHTS | WHERE THEY STAY



Online-booked holiday rentals are the leading accommodation choice among Australian holidaymakers, followed closely by hotels

POPULAR ACCOMMODATION TYPES



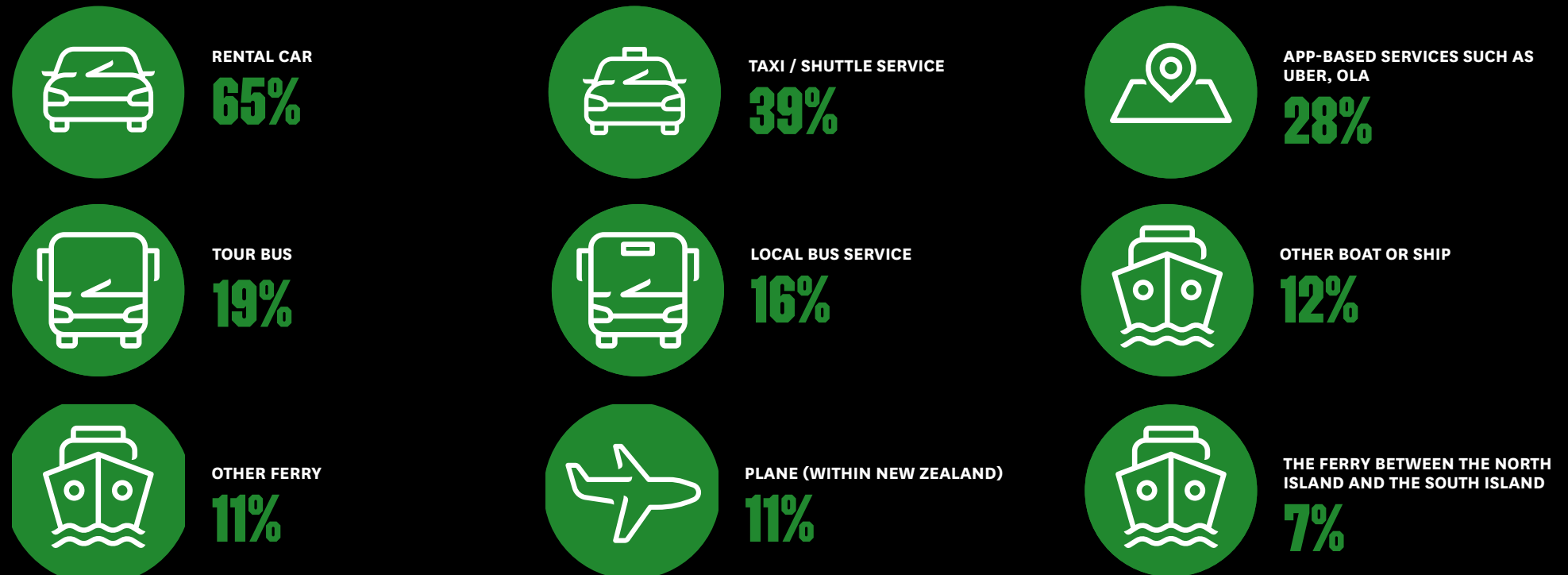
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VISITOR INSIGHTS | HOW THEY TRAVEL



Rental cars are the primary mode of transport for Australian holidaymakers, complemented by taxis, shuttles, and rideshare services

HOW THEY TRAVEL



OUR FUTURE TRAVELLERS

Active Considerers

Who qualifies as an Active Considerer?

Active Considerers are travellers who meet all four criteria:

- **High appeal** – Find New Zealand highly appealing as a holiday destination
- **Strong intent** – Would seriously consider visiting in the next three years
- **Destination preference** – Agree that New Zealand is a preferred destination for their next holiday
- **Realistic budget** – Have a minimum spend level aligned to the market

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ACTIVE CONSIDERERS | JOURNEY FUNNEL



New Zealand has broad appeal among Australians, with 5.7 million qualifying as Active Considerers and 40% of those ranking it among their top holiday destination to visit



70%

OFF-PEAK CONSIDERATION*



40%

(2.3M) TOP PREFERENCE** AMONG ACTIVE CONSIDERERS



12%

(661K) BOOKING MINDSET***

*Off-Peak Consideration: Would consider travelling during autumn, winter, or spring, in addition to or instead of summer.

**Top Preference: Rank New Zealand as their #1 destination choice

***Booking Mindset: Ready to make firm bookings or have already booked their trip

Source: Active Considerer Monitor data six-month period ending May 2026

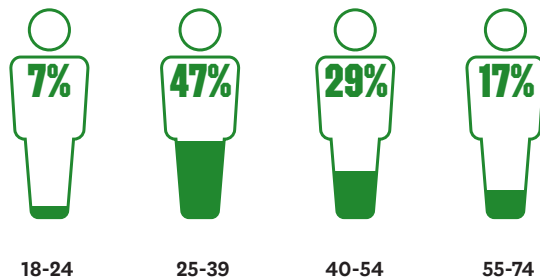
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ACTIVE CONSIDERERS | WHO THEY ARE & WHERE THEY LIVE

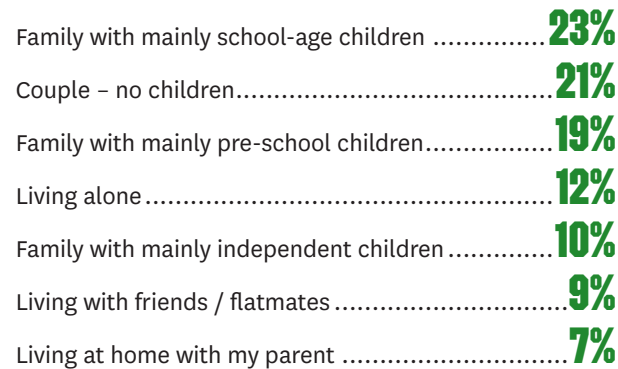


Active Considerers are predominantly aged 25-54, financially comfortable, and concentrated in Australia's east coast

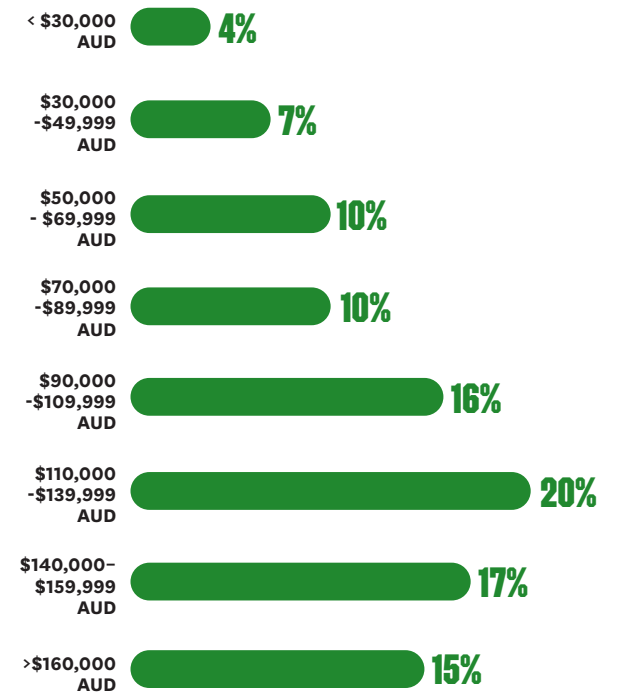
AGE SEGMENT OF ACTIVE CONSIDERERS



FAMILIES AND COUPLES MAKE UP THE LARGEST HOUSEHOLD GROUPS



THE MAJORITY OF ACTIVE CONSIDERERS HAVE HOUSEHOLD INCOMES ABOVE \$110K



25-54

ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEABOARD



**Doesn't include those selecting 'prefer not to answer'*

Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | HOW THEY SEE NEW ZEALAND



Nature, adventure, safety, family-friendly appeal, and a unique Indigenous culture define New Zealand's appeal among Australian Active Considerers



Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | REASONS TO VISIT NEW ZEALAND



Australians are drawn to New Zealand for its natural beauty, adventure, opportunities to unwind, and local food & beverage experiences



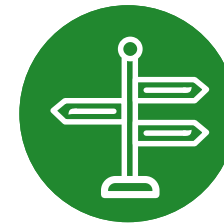
TO EXPERIENCE BEAUTIFUL
LANDSCAPES/SCENERY

51%



TO HAVE FUN & ENJOY
MYSELF

44%



TO LEARN & EXPLORE
NEW THINGS

39%



TO FEEL A SENSE OF
ADVENTURE

38%



TO FEEL RELAXED AND
REFRESHED

38%



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

34%



TO ENJOY LOCAL FOOD AND
BEVERAGES

33%



TO GET IN TOUCH WITH NATURE

29%



TO INTERACT WITH PEOPLE OF A
DIFFERENT CULTURE OR LIFESTYLE

26%

Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY WOULD LIKE TO SEE & DO IN NEW ZEALAND



Our Australian active considerers highly value opportunities to taste local cuisine, explore towns, enjoy New Zealand's beaches and cities, and immerse themselves in the country's scenic nature and cultural heritage



HISTORICAL SITES AND
HERITAGE SITES

88%



LAKES, RIVERS AND WATERFALLS

86%



TRYING LOCAL CUISINE

85%



EXPERIENCING LOCAL TOWNS

84%



BEACHES & COASTS

84%



MOUNTAINS AND ALPINE AREAS

83%



VISITING NATIONAL PARKS,
NATURE RESERVES OR NATIVE
FORESTS

83%



WILDLIFE EXPERIENCE

82%



SCENIC TRAIN TRIP

82%

Source: Active Considerer Monitor data six-month period ending May 2026

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ACTIVE CONSIDERERS | WHAT THEY NEED TO KNOW BEFORE VISITING NEW ZEALAND



Planning a New Zealand holiday centres on transport, timing, attractions, and travel logistics



HOW EASY IT IS TO TRAVEL
AROUND

39%



WHAT THE WEATHER IS LIKE

32%



WHAT TIME OF YEAR IS BEST FOR
THE ACTIVITIES I WANT TO DO

32%



WHAT/WHERE THE RECOMMENDED
THINGS TO SEE AND DO ARE

30%



HOW LONG IT TAKES TO TRAVEL
BETWEEN THE MAIN ATTRACTIONS

30%



HOW SAFE IT IS FROM CRIME

26%



THE LENGTH OF TIME NEEDED TO
EXPERIENCE NEW ZEALAND PROPERLY

25%



HOW WELCOMING THE
LOCALS ARE

24%



THE QUALITY AND VARIETY OF
FOOD AND BEVERAGE OPTIONS

24%

Source: Active Considerer Monitor data six-month period ending May 2026

NGA MIHI