

AUSTRALIA

Visitors & Market Insights

July 2025



**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 people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Statistics New Zealand'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
- Singapore



VISITOR INSIGHTS

Latest Australia market arrival insights
International Visitor Survey

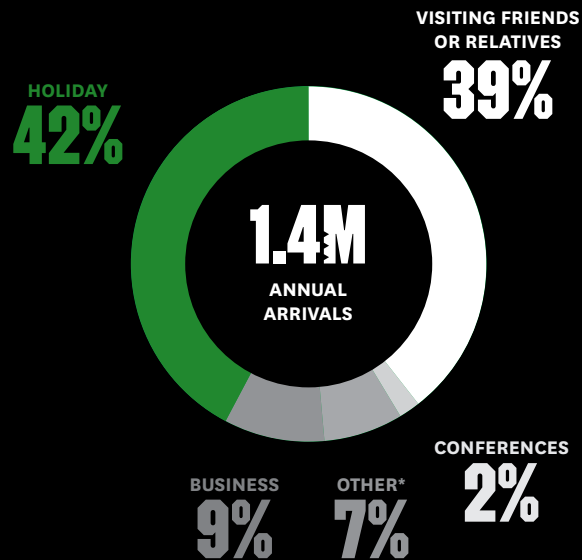
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TRAVELLER INSIGHTS

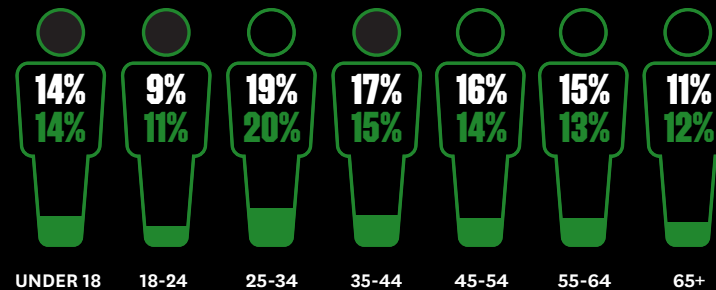


Australia is New Zealand's top visitor source, with 1.4 million arrivals last year. Holidaymakers made up 42%, mostly aged 25-34, staying an average of 9 days. Visits peak in summer but are evenly spread. Main reasons for travel include holidays (42%), visiting family (39%), and business (9%).

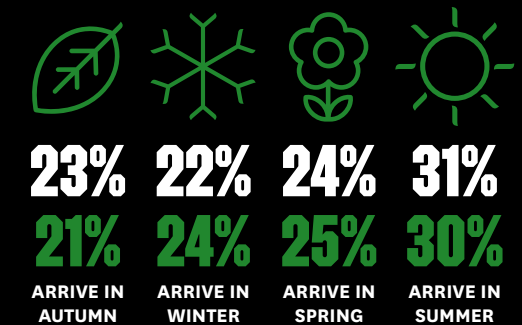
PURPOSE OF VISIT



35% OF HOLIDAYMAKERS ARE 25-44 YEARS



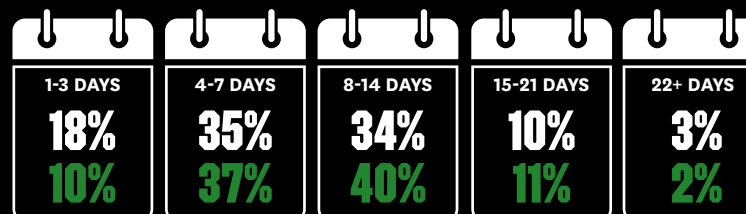
EVEN SEASONAL VISITATION PEAKS IN SUMMER



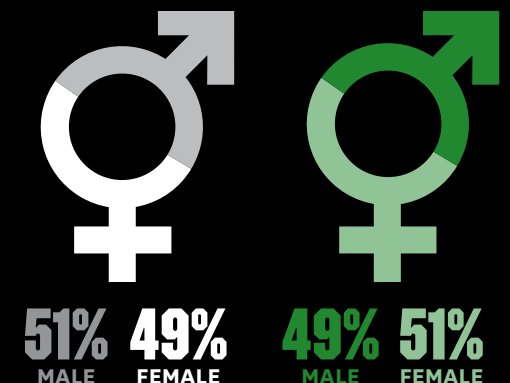
AVERAGE LENGTH OF STAY



LENGTH OF STAY (DAYS)



GENDER OF VISITORS



Source: Statistics NZ international Visitor Arrivals – Year ending May 2025
 *Seasons: Winter 24, Spring 24, Summer 24/25, Autumn 25

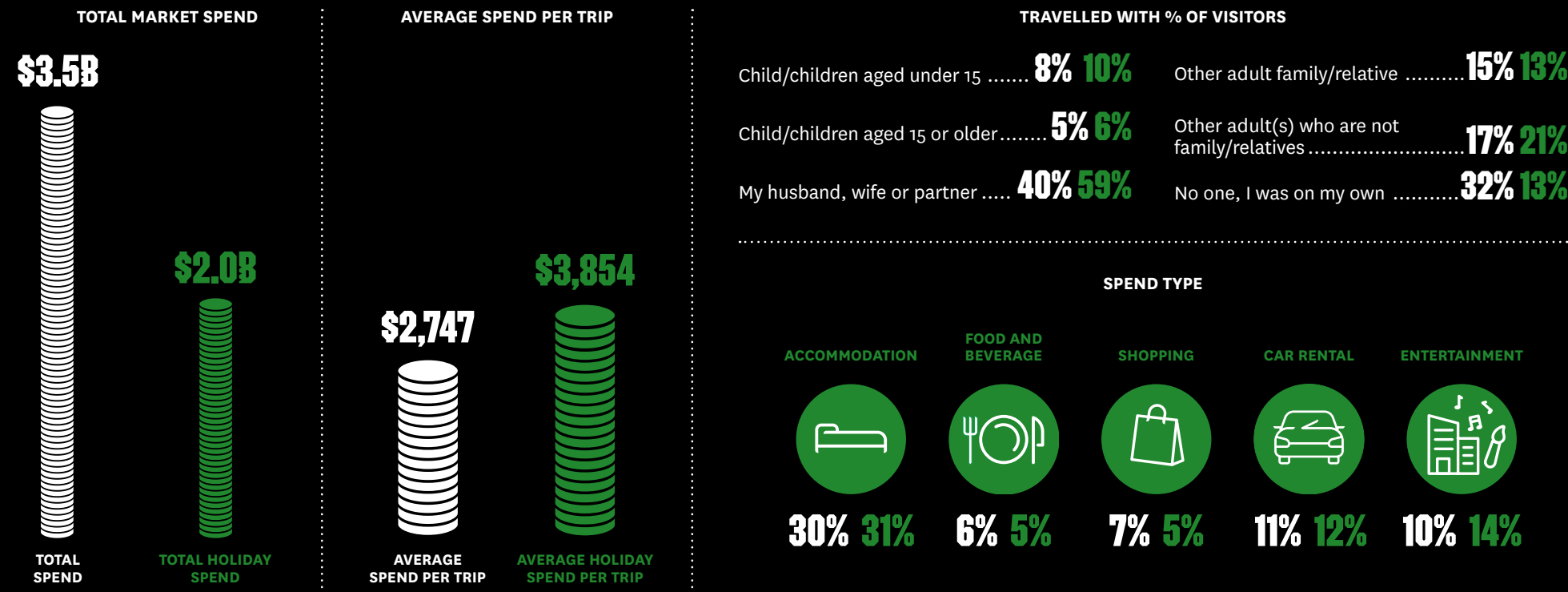
Due to rounding, the sum of individual group percentages may not total exactly 100%

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VISITOR SNAPSHOT



Australian visitors spent \$3.5bn in New Zealand, with \$2.0bn by holidaymakers. The average spend per trip was \$2,747, rising to \$3,854 for those on holidays. 30% of spending was on accommodation, and visitors were more likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

Source: MBIE, International Visitor Survey. Year ending March 2025

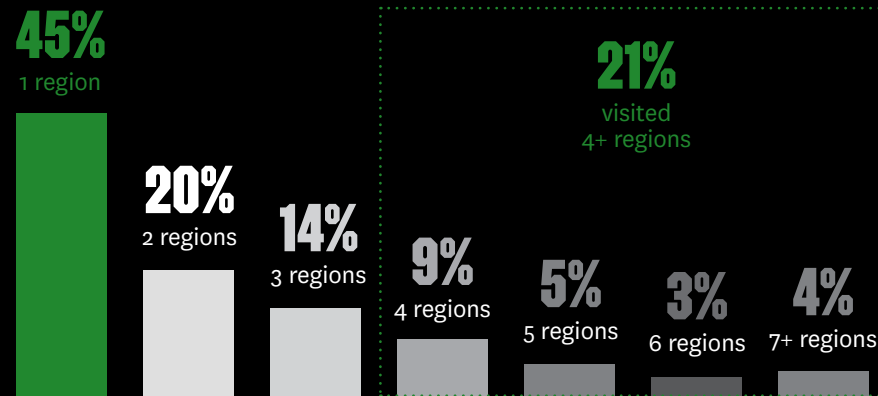
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HOLIDAY TRAVELLER INSIGHTS

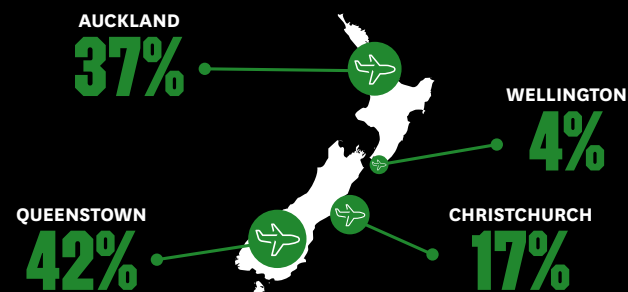


Most Australian tourists visited the South Island (70%), while 47% explored the North Island, and 17% visited both. Among them, 21% visited four or more regions. Queenstown was the most popular destination, followed by Auckland and Christchurch.

NUMBER OF REGIONS VISITED PER VISIT



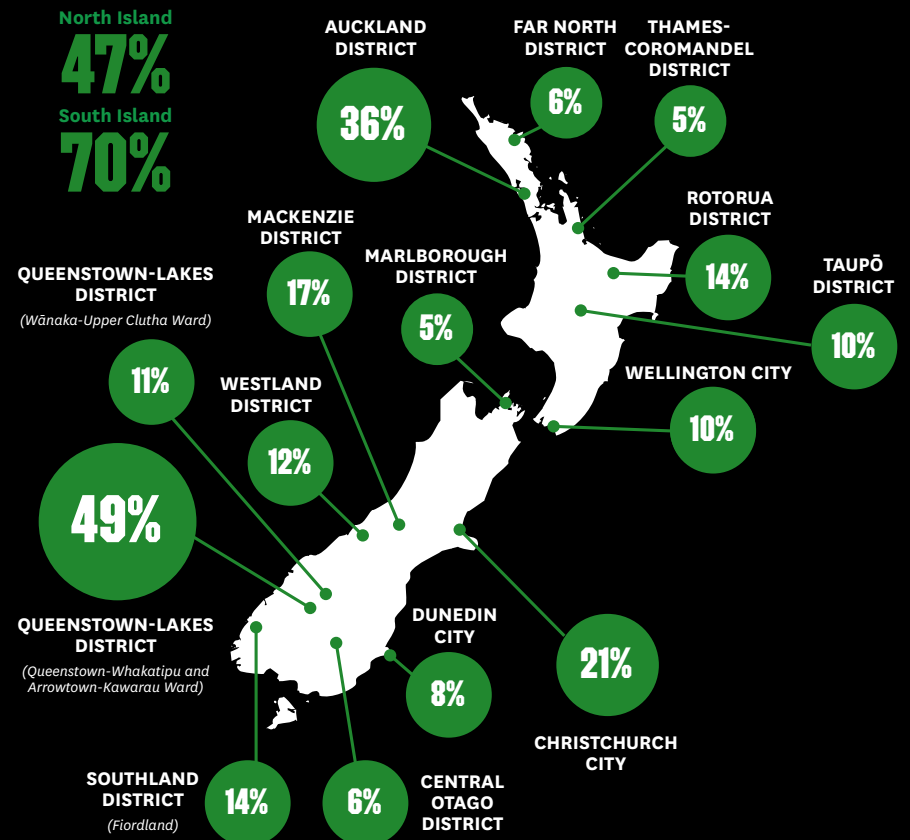
ARRIVAL AIRPORT



Source: MBIE, International Visitor Survey | Year ending March 2025 | Holiday Visitors
NZ Stats - Holiday Arrivals (Port of Arrival)

REGIONS VISITED PER VISIT

ISLANDS VISITATION



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HOLIDAY TRAVELLER INSIGHTS



Australians holidaying in New Zealand are drawn to its natural beauty, with mountains, lakes, hiking trails, and national parks topping the list. Many also enjoy beach visits, museums and galleries, along with brewery, gin and wine trails. Other popular experiences include hot pools, film locations, and geothermal parks.

TOP ACTIVITIES ENJOYED BY AUSTRALIANS IN NEW ZEALAND



75%

Other natural attractions



73%

Walk, hike, trek or tramp



60%

Visiting a national park



37%

A beach



36%

Museum or art gallery



29%

Brewery, gin, vineyard /
wine trail

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HOLIDAY 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



45%

Hotel



43%

House/apartment booked online (AirBnb etc)



25%

Motel, motor inn or serviced apartment



12%

Luxury accommodation



11%

Family or friends



8%

House / flat that you paid some rent for



7%

Paid camping ground/ holiday park



6%

Backpackers



4%

Bed and Breakfast

MODES OF TRANSPORT



54%

Rental car



31%

Taxi/shuttle



21%

Uber or other app based



13%

Local bus service



13%

Tour bus



10%

Other boat or ship



9%

Ferries



7%

Plane (within New Zealand)



6%

Car or van owned by you / family / friend(s) / company

OUR FUTURE TRAVELLERS

Active Considerers

They are Tourism New Zealand's marketing audiences. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination within the next three years and a realistic budget for their trip.

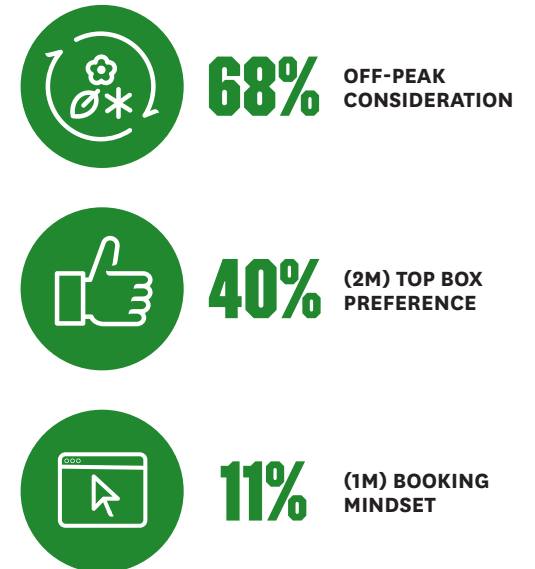
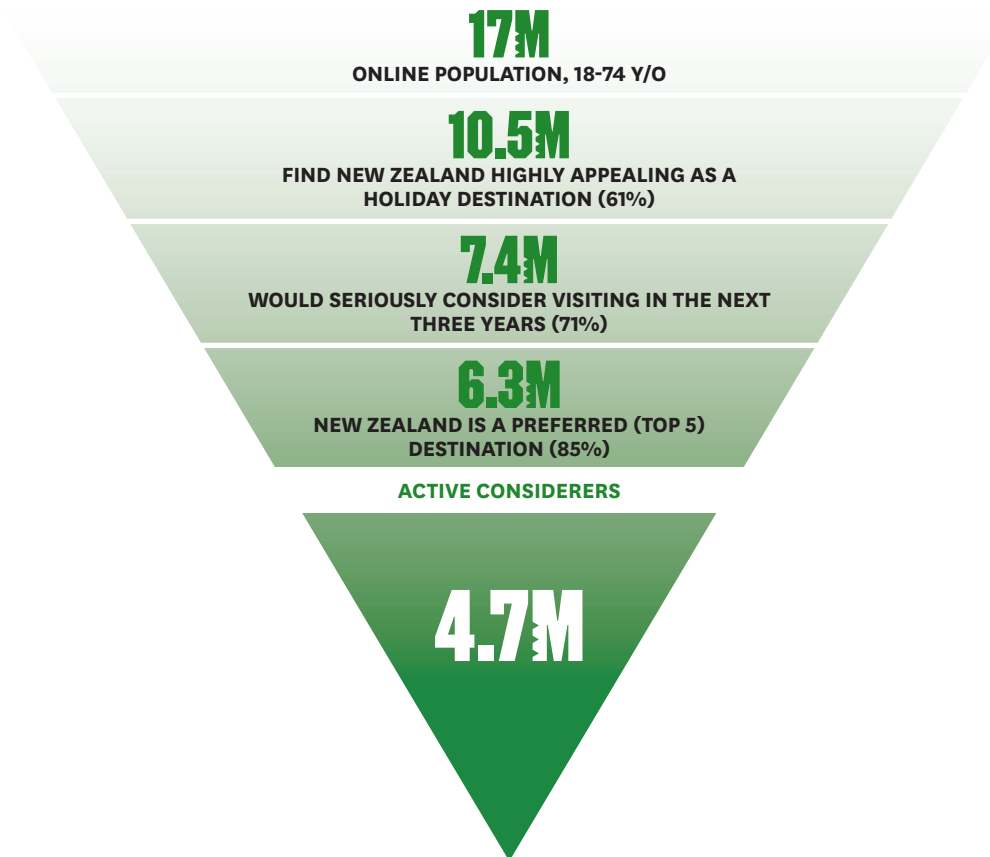


AUSTRALIA

ACTIVE CONSIDERERS



New Zealand appeals to 61% of Australia's 18–74 online population — that's 10.5 million people. Of these, 7.4 million would seriously consider visiting, 6.3 million rank it in their top five destinations, and 4.7 million are willing to spend a realistic budget — representing a sizeable pool of Active Considerers.



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years and Australians indicate they are willing to spend at least \$1,500AUD on a holiday to NZ.

Source: Active Considerer Monitor data 6-month period ending June 2025

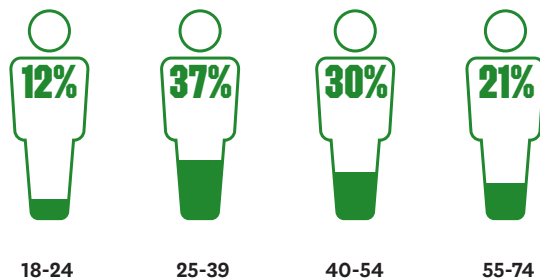
AUSTRALIA

ACTIVE CONSIDERERS

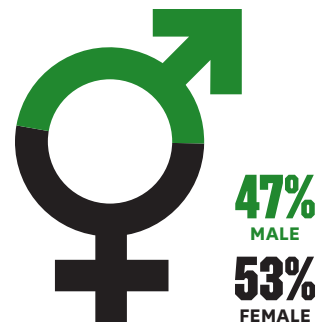


Active Considerers skew to 25-39 years old, largely reside in New South Wales and Victoria and over 1 in 5 have a household income of over AUD \$140,000.

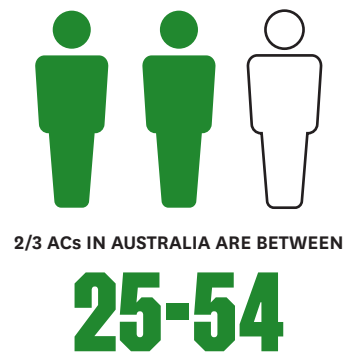
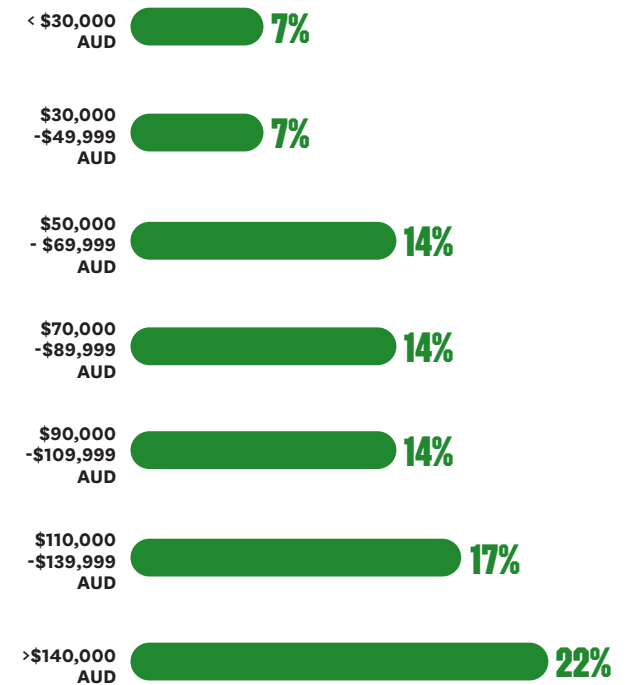
AGE SEGMENT OF ACTIVE CONSIDERERS



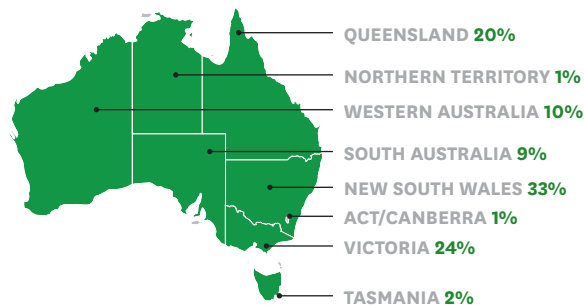
GENDER OF ACs



ANNUAL HOUSEHOLD INCOME SPREAD - ACs



ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEABOARD



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

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AUSTRALIA

ACTIVE CONSIDERERS



Among Australians, New Zealand is renowned for its stunning landscapes, outdoor adventures, and family-friendly appeal.

BRAND ASSOCIATIONS



SPECTACULAR NATURAL
LANDSCAPES AND SCENERY

85%



OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES

82%



I WOULD FEEL SAFE TRAVELLING
AROUND THIS DESTINATION

79%



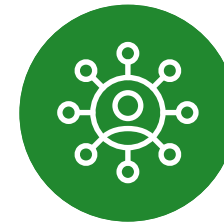
IDEAL FOR A FAMILY
HOLIDAY

78%



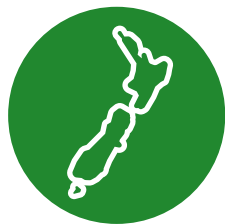
THE ENVIRONMENT THERE IS
CLEAN AND UNPOLLUTED

77%



OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES

77%



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

76%



HAS A UNIQUE
INDIGENOUS CULTURE

75%



OFFERS OPPORTUNITIES TO
EXPERIENCE LOCAL CULTURE

75%

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Source: Active Considerer Monitor data 6-month period ending June 2025

AUSTRALIA

ACTIVE CONSIDERERS



New Zealand's beautiful landscapes, nature, enjoyment, and relaxation are key reasons to visit. Additionally, Australian visitors seek to learn new things, take a break, and enjoy local food and beverages, among other experiences.

REASONS TO VISIT NEW ZEALAND



TO EXPERIENCE BEAUTIFUL
LANDSCAPES/SCENERY

55%



TO HAVE FUN & ENJOY
MYSELF

51%



TO FEEL RELAXED AND
REFRESHED

47%



TO LEARN & EXPLORE
NEW THINGS

46%



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

38%



TO GET IN TOUCH WITH NATURE

35%



TO FEEL A SENSE OF
ADVENTURE

34%



TO ENJOY LOCAL FOOD AND
BEVERAGES

33%



TO CREATE LASTING MEMORIES
THROUGH PHOTOGRAPHY

27%

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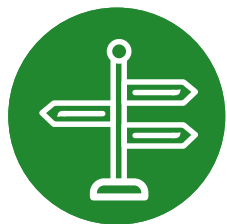
AUSTRALIA

ACTIVE CONSIDERERS



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.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



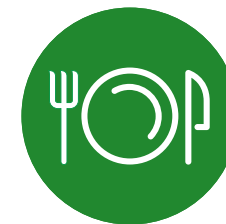
EXPERIENCING LOCAL TOWNS

92%



LAKES, RIVERS AND WATERFALLS

92%



TRYING LOCAL CUISINE

91%



HISTORICAL SITES AND
HERITAGE SITES

90%



BEACHES & COASTS

90%



SCENIC TRAIN TRIP

89%



EXPLORING MAIN CITIES

89%



VISITING NATIONAL PARKS,
NATURE RESERVES OR NATIVE
FORESTS

89%



WILDLIFE EXPERIENCE

87%

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Source: Active Considerer Monitor data 6-month period ending June 2025

AUSTRALIA

ACTIVE CONSIDERERS



Key knowledge gaps for prospective Australian visitors include ease of transportation, the best time of year to travel, New Zealand's weather conditions, recommended activities and attractions, and travel distances within the country.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



HOW EASY IT IS TO TRAVEL
AROUND

42%



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

35%



WHAT THE WEATHER IS LIKE

35%



WHAT/WHERE THE RECOMMENDED
THINGS TO SEE AND DO ARE

29%



HOW LONG IT TAKES TO TRAVEL
BETWEEN THE MAIN ATTRACTIONS

29%



HOW SAFE IT IS FROM CRIME

29%



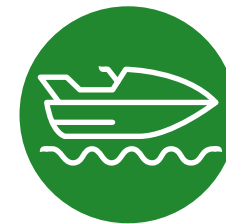
THE LENGTH OF TIME NEEDED TO
EXPERIENCE NEW ZEALAND PROPERLY

28%



HOW WELCOMING THE
LOCALS ARE

26%



HOW SAFE IT IS TO PARTICIPATE
IN ADVENTURE ACTIVITIES

25%

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NGA MIHI