AUSTRALIA

Market information about our Visitors and our Active Considerers
Past Visitor Research
This is information collected about those who have visited New Zealand. This is the source for the visitor snapshot infographics. It is primarily sourced from Statistics New Zealand (International Travel and Migration), and the Ministry of Business, Innovation and Employment. (International Visitor Survey).

Throughout this document, any pages that refer to past visitor research will have a black background like this one.

Active Considerer Research
An Active Considerer is someone who is considering coming to New Zealand for their next holiday, and New Zealand is one of their top five destinations they would most like to visit. Tourism New Zealand commissions ongoing research (Kantar TNS), to understand who these people are, and what their motivations and barriers are; this research is the key information source for understanding our future visitors.

Throughout this document, any pages that refer to Active Considerer research will have a white background like this one.
Australia is our largest market accounting for 40% of total arrivals. Australian visitors spent $2.5b in the past year.

Arrivals from Australia have seen strong growth in recent years and are forecast to grow above 3% per annum to 2023.
AUSTRALIA

VISITOR PROFILE

Independent Professionals are over half of Australian holiday arrivals.

AGE PROFILE OF HOLIDAY VISITORS

11% YOUTH
Ages 18-24

51% INDEPENDENT PROFESSIONALS
Ages 25-54

22% ACTIVE BOOMERS
Ages 55-74

VISITOR ROUTES

Over 80% of Australian holiday visitors are from New South Wales, Queensland and Victoria.

84% OF HOLIDAY ARRIVALS ARE FROM EASTERN STATES

47% OF AUSTRALIAN HOLIDAY VISITORS FLY DIRECT TO THE SOUTH ISLAND

TOP 5 HOLIDAY VISITOR ROUTES

- SYDNEY-AUCKLAND 95K
- SYDNEY-QUEENSTOWN 75K
- MELBOURNE-AUCKLAND 69K
- SYDNEY-CHRISTCHURCH 55K
- BRISBANE-AUCKLAND 52K
Australian arrivals are well balanced across seasons but there remains an opportunity to encourage more shoulder season travel.

**THE SUMMER MONTHS ARE MOST POPULAR BUT THE AUSTRALIAN MARKET IS IMPORTANT FOR TOURISM IN WINTER**

- Arrive in Summer: 32%
- Arrive in Autumn: 22%
- Arrive in Winter: 24%
- Arrive in Spring: 23%

**AUSTRALIANS MAKE UP THE MAJORITY OF INTERNATIONAL VISITORS WHO SKI WHILE IN NEW ZEALAND**

- Of holiday visitors who ski are from Australia: 64%

**VISITOR DESTINATIONS**

Otago and Auckland are the most visited regions and account for half of spend.
AUSTRALIA
VISITOR ACTIVITIES

Top activities for Australian holiday visitors.

- WINE & FOOD: 23%
- WALKING & HIKING: 73%
- SKI: 13%
- CYCLING: 7%
- GOLF: 2%
- NATIONAL PARK: 62%
- BEACH: 51%
- GONDOLA / CABLE CAR: 46%
- OBSERVING WILDLIFE: 71%
- MUSEUM / ART GALLERY: 44%
- SCENIC BOAT TRIP: 46%
- BARS / NIGHTCLUBS: 34%
- MĀORI CULTURAL EXPERIENCE / ACTIVITY: 34%

AUSTRALIAN SPECIAL INTEREST PARTICIPATION

- NATIONAL PARK: 62%
- BEACH: 51%
- GONDOLA / CABLE CAR: 46%
- OBSERVING WILDLIFE: 71%
- MUSEUM / ART GALLERY: 44%
- SCENIC BOAT TRIP: 46%
- WALK / HIKE / TRAMP: 73%
- BARS / NIGHTCLUBS: 34%
- MĀORI CULTURAL EXPERIENCE / ACTIVITY: 34%

VISITOR ACCOMMODATION AND TRANSPORT

Australians tend to stay in motels and hotels and many will rent a car to get around.

ACCOMMODATION STAYED IN

- MOTEL / MOTOR INN / SERVICED APPT: 44%
- HOTEL: 37%
- FAMILY AND FRIENDS: 16%
- LUXURY: 15%
- BACKPACKER / HOSTELS: 12%
- CAMPING: 11%
- BED AND BREAKFAST: 10%
- PRIVATE CAR: 24%
- RENTAL CAR: 64%
- PLANE: 10%
- TAXI / SHUTTLE: 45%
- TRAIN: 9%
- FERRY OR BOAT SERVICE: 25%
- COOK STRAIT FERRY: 8%
- BUS SERVICE: 20%
- CAMPERVAN: 6%

SELF DRIVE IS A POPULAR OPTION FOR AUSTRALIAN VISITORS
AUSTRALIA VISITOR SATISFACTION

Australians are highly satisfied with their New Zealand holiday experience.

Overall Australian visitors rate their New Zealand experience very positively.

SATISFACTION

9.1/10

MEETING EXPECTATIONS

95%

Expectations of New Zealand experience met or exceeded

30% Exceeded

59% Met

3% Worse than

2% Not sure

NET PROMOTER SCORE

80% LIKELY TO RECOMMEND NEW ZEALAND AS A DESTINATION

83% PROMOTERS

3% DETRACTORS

14% PASSIVES

AUSTRALIA ACTIVE CONSIDERERS

Active Considerers are what we call our target audience. These people are aged 18-74, they are aware of New Zealand, and it is a preferred destination to visit for a holiday in the next three years. They also indicate that they are prepared to spend AUD $1,500 per person on their holiday.
Australia
ACTIVE CONSIDERER PROFILE

Australian Active Considerers = 3.3m

MOST ACTIVE CONSIDERERS ARE INDEPENDENT PROFESSIONALS

GENDER SKEWS MALE

ACTIVE CONSIDERERS ARE MORE LIKELY TO BE TERTIARY QUALIFIED

ACTIVE CONSIDERERS HAVE HIGHER HOUSEHOLD INCOME

ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEA BOARD

WHAT DO THEY NEED MORE INFORMATION ABOUT?

WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?

WHAT/WHERE THE RECOMMENDED THINGS TO DO AND SEE ARE

HOW EASY IT IS TO TRAVEL AROUND

HOW LONG IT TAKES TO TRAVEL BETWEEN THE MAIN ATTRACTIONS

HOW TO INTERPRET THIS DATA

27% of Active Considerers said they wanted to know more about how easy it is to travel around New Zealand.
For our Australian Active Considerers, New Zealand is in the competitive set including destinations such as Canada, UK, USA, France and Hawaii. Our strengths are our clean and unpolluted environment, as well as our range of adventure.

WHAT AUSTRALIANS KNOW US FOR

- Clean & unpolluted
- Range of adventure
- Affordable activities
- Affordable to fly to

MESSAGES WE NEED TO COMMUNICATE MORE

- Seeing lots without travelling far
- Easy to travel around
- Friendly people
- Unique experiences
- Landscapes & scenery
AUSTRALIA

ACTIVE CONSIDERER INDEPENDENT PROFESSIONAL PROFILE

Independent Professionals are people aged 25-54 years old. They are the largest segment within our Active Considerer target audience, making up 70% of our target audience.

WHAT THE TRANSPORT OPTIONS ARE FOR TRAVEL WITHIN NEW ZEALAND

18%

WHAT DO INDEPENDENT PROFESSIONALS WANT FROM A HOLIDAY IN NEW ZEALAND?

TO HAVE Fun AND ENJOY MYSELF - 61%
TO LEARN AND EXPLORE NEW Things - 59%
TO TAKE A BREAK FROM Routine LIFE - 53%
TO FEEL RELAXED - 53%
TO FEEL REFRESHED - 51%

WHAT DOES THEIR HOLIDAY LOOK LIKE?

STAYING FOR 1-2 WEEKS
TRAVELLING WITH PARTNER OR SPOUSE
SELF DRIVE EXPLORING

WHAT DO THEY NEED MORE INFORMATION ABOUT?

WHAT/WHERE THE RECOMMENDED Things TO DO AND SEE ARE
HOW EASY IT IS TO TRAVEL AROUND
WHAT THE TRANSPORT OPTIONS ARE FOR TRAVEL WITHIN NEW ZEALAND
AUSTRALIA
ACTIVE CONSIDERER ACTIVE BOOMER PROFILE

Active Boomers are people aged 55-74 years old. They are the second largest segment of our Active Considerer target audience, making up 20% of our target audience.

GENDER - IN LINE WITH TOTAL POPULATION

ACTIVE BOOMERS ARE MORE LIKELY TO BE TERTIARY QUALIFIED

ACTIVE BOOMERS ARE MORE LIKELY TO HAVE HIGHER HOUSEHOLD INCOME

WHAT DO ACTIVE BOOMERS WANT FROM A HOLIDAY IN NEW ZEALAND?

WHAT DOES THEIR HOLIDAY LOOK LIKE?

WHAT DO THEY NEED MORE INFORMATION ABOUT?

WHAT/WHERE THE RECOMMENDED THINGS TO DO AND SEE ARE

HOW EASY IT IS TO TRAVEL AROUND

THE LENGTH OF TIME NEEDED TO EXPERIENCE NEW ZEALAND PROPERLY

STAYING FOR 1-2 WEEKS
TRAVELLING WITH PARTNER OR SPOUSE
SELF DRIVE EXPLORING

Renting, borrowing or purchasing a vehicle to travel NZ in. They have high mobility across regions so typically do more activities.