

AUSTRALIA

These packs provide a brief snapshot of our core visitor markets prior to the interruption of international travel due to Covid-19.

Queen Charlotte Track, Marlborough Sounds



**100% PURE
NEW ZEALAND**

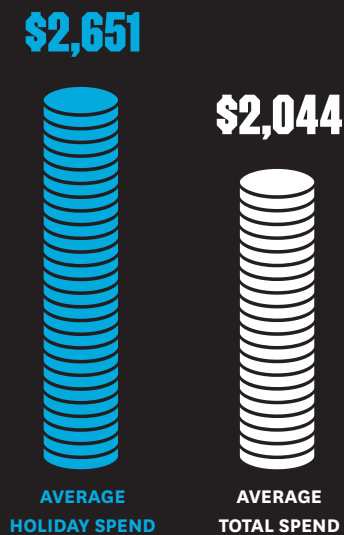
AUSTRALIA

VISITOR SNAPSHOT



Australia is New Zealand's largest market. They contribute 1.5M (40%) arrivals annually and spent \$2.7b in the past year.

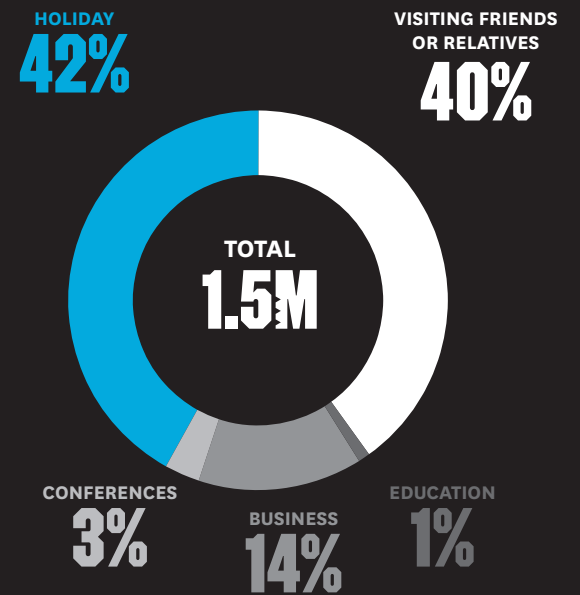
AVERAGE SPEND PER VISITOR



TOTAL MARKET CONTRIBUTION SPEND



PURPOSE OF VISIT



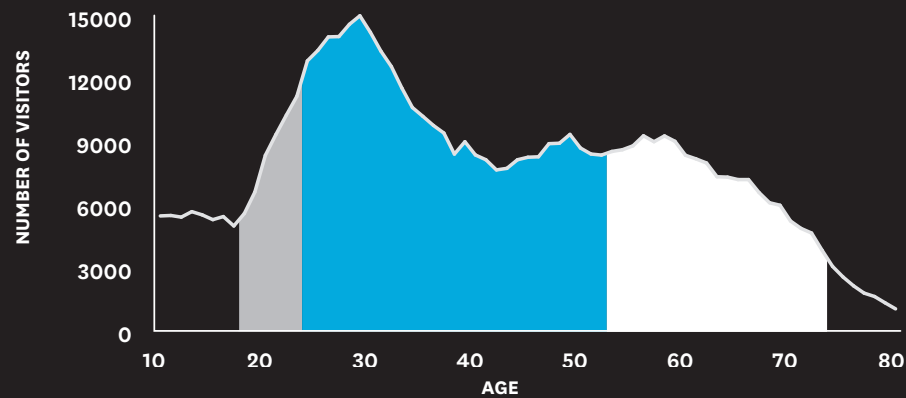
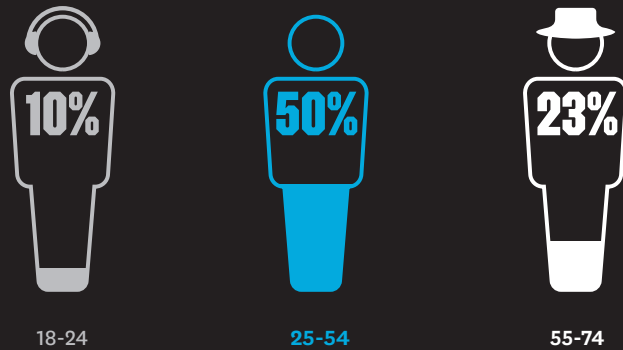
AUSTRALIA

VISITOR SNAPSHOT



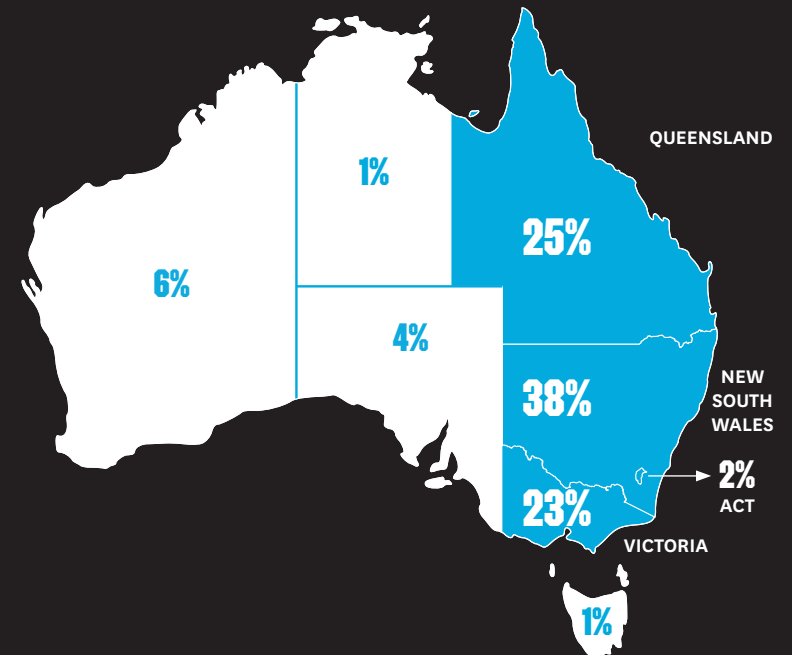
24% of Australian holiday arrivals are aged 25-34

AGE PROFILE OF HOLIDAY VISITORS



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

HOLIDAY ARRIVALS BY STATE



Source: Stats NZ international visitor arrivals Feb 2020

AUSTRALIA

VISITOR ACTIVITIES



Australian holiday arrivals are balanced throughout the entire year. They make up 27% of holiday arrivals but over winter this is 43%



31%

ARRIVE IN SUMMER



21%

ARRIVE IN AUTUMN



23%

ARRIVE IN WINTER



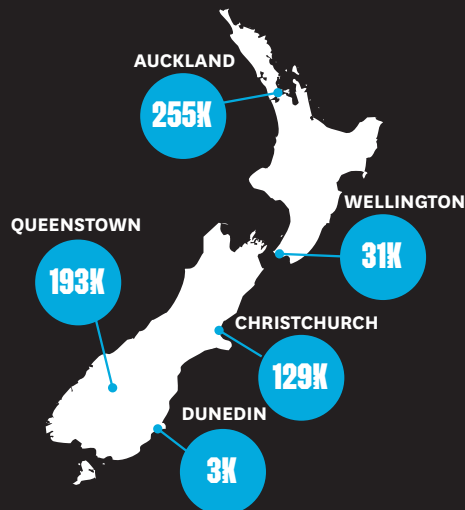
25%

ARRIVE IN SPRING



53%

OF AUSTRALIAN HOLIDAY VISITORS FLY DIRECT TO THE SOUTH ISLAND



56%

OF AUSTRALIAN HOLIDAY VISITORS RENT A CAR IN NEW ZEALAND

NZ is a short haul destination for Australians. They have the option of a short break but over half stay longer than a week while on holiday

LENGTH OF STAY (DAYS)



Popular Activities



WILDLIFE ACTIVITIES



WATER ACTIVITIES



71%

OF ALL INTERNATIONAL VISITORS WHO SKI ARE AUSTRALIAN



MUSEUMS, GALLERIES AND LIVE PERFORMANCES



ADVENTURE TOURISM

Source: Stats NZ international visitor arrivals Feb 2020
MBIE International Visitor Survey December 2019

AUSTRALIA

ACTIVE CONSIDERER PROFILE



Active Considerers (ACs) are what we call our target audience. These people are aged 18-74, and have New Zealand as a preferred holiday destination in the next three years. They also indicate that they are prepared to spend AUD \$1,500 per person on their holiday.

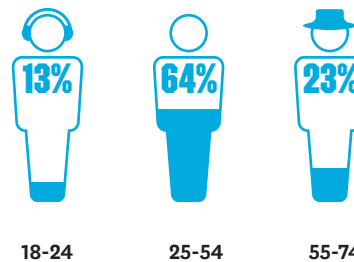
TOTAL ACTIVE CONSIDERERS

5.8M

APPROXIMATE NUMBER OF AUSTRALIAN ACTIVE CONSIDERERS (DEC 2019)



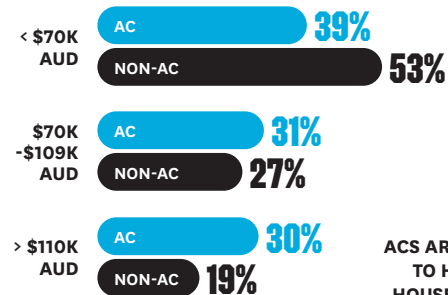
AGE SEGMENT OF ACTIVE CONSIDERERS



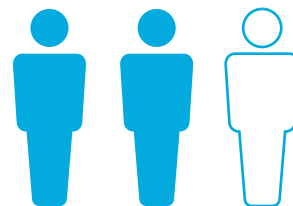
TERTIARY EDUCATION OF ACS (BACHELOR'S DEGREE OR HIGHER)



HOUSEHOLD INCOME SPREAD ACS VS NON-ACS



ACS ARE MORE LIKELY TO HAVE A HIGHER HOUSEHOLD INCOME



NEARLY 2/3 ACS IN AUSTRALIA ARE BETWEEN

25-54

ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEA BOARD



Active considerer data is from the 6 month period ending April 2020

AUSTRALIA

ACTIVE CONSIDERER METRICS



Appeal of and preference for NZ as a holiday destination has remained high during the Covid-19 pandemic.



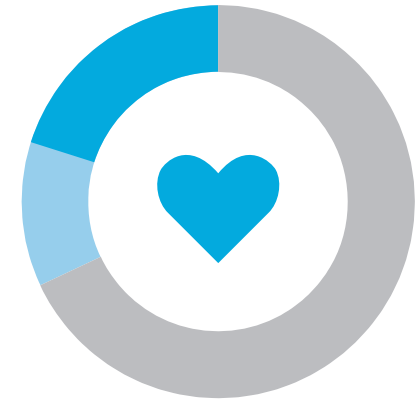
67%

ONLINE AUDIENCE 18-74 FIND
NEW ZEALAND APPEALING AS
A DESTINATION



32%

OF ONLINE AUDIENCE 18-74 ARE
ACTIVE CONSIDERERS



63%

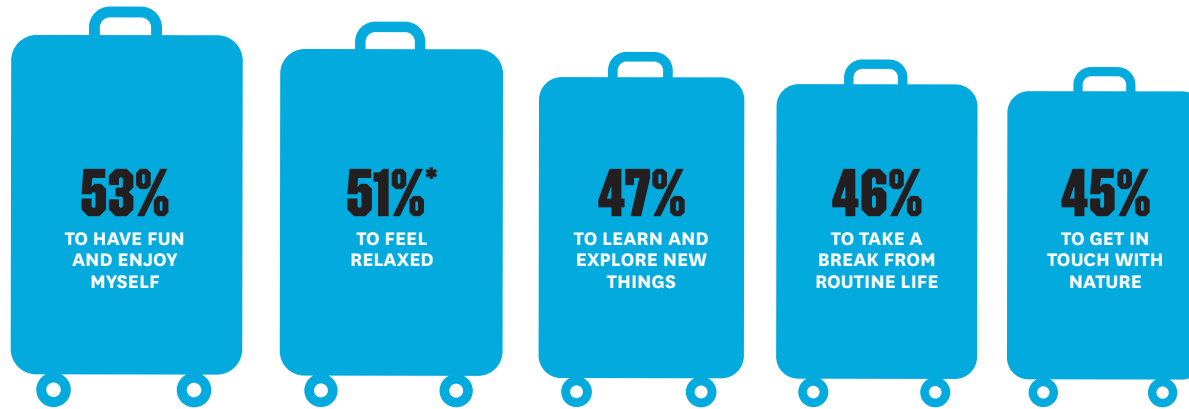
ACTIVE CONSIDERERS RANK
NEW ZEALAND #1 OR #2 AS A
PREFERRED DESTINATION

AUSTRALIA

ACTIVE CONSIDERER MINDSET

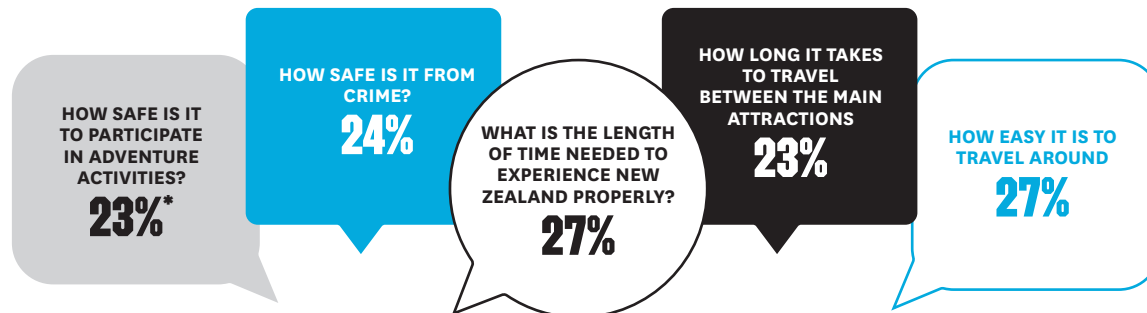


WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?



*the 55-74 age group are the most interested in wanting to feel relaxed (61%)

WHAT DO THEY NEED MORE INFORMATION ABOUT?



*the 55-74 age group are the least concerned with safety in adventure activities (14%)



Most often, Active Considerers are interested in trips with their partner or as a family with their children.

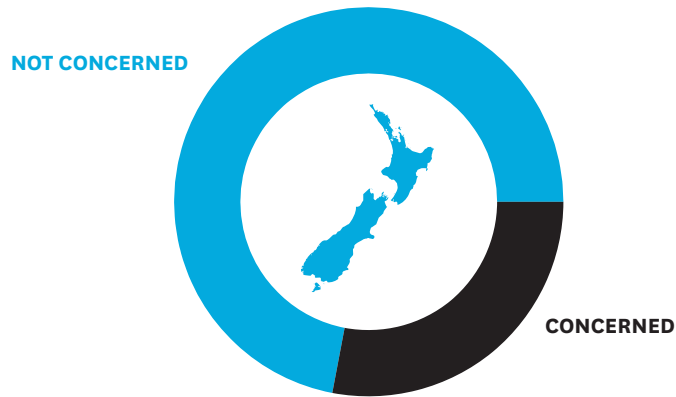


AUSTRALIA

DEMAND FOR NEW ZEALAND REMAINS STRONG, DESPITE COVID-19



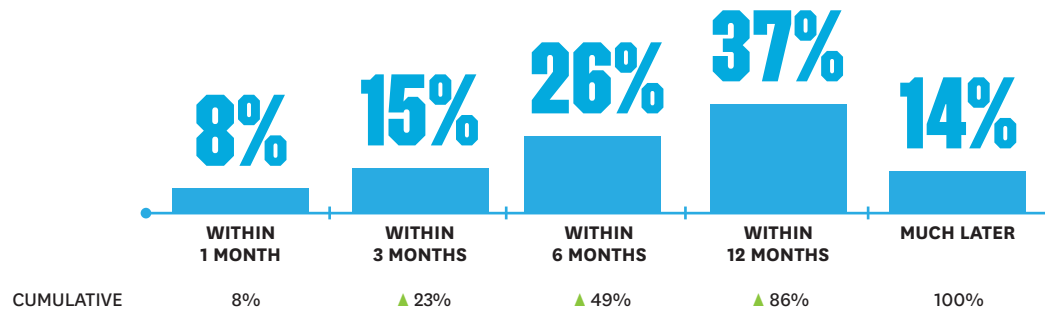
% ACs CONCERNED ABOUT TRAVELLING TO NEW ZEALAND ONCE BORDER RESTRICTIONS ARE LIFTED



72%

OF AUSTRALIAN ACs HAVE NO CONCERN ABOUT TRAVELING TO NEW ZEALAND

SPEED OF NEW ZEALAND HOLIDAY DEMAND RECOVERY AFTER RESTRICTIONS ARE LIFTED



▲ Significantly higher than March 2020

Sample: Active Considerers (AC) March Total n=300. April Total n=300. Non-Active Considerers (non-AC) Total n=300.

47%

OF AUSTRALIAN ACs HAVE AN IMPROVED PERCEPTION OF NEW ZEALAND FOLLOWING NEW ZEALAND BORDER CLOSURES

58%

OF AUSTRALIAN ACs HAVE MISSED BEING ABLE TO TRAVEL INTERNATIONALLY DURING THE PANDEMIC – FOR 15% THIS WAS THE THING THEY MISSED THE MOST