AUSTRALIA

These packs provide a brief snapshot of our core visitor markets prior to the interruption of international travel due to Covid-19.
Australia is New Zealand’s largest market. They contribute 1.5M (40%) arrivals annually and spent $2.7b in the past year.

Source: Stats NZ international visitor arrivals Feb 2020
MBIE International Visitor Survey December 2019
24% of Australian holiday arrivals are aged 25-34

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

Source: Stats NZ international visitor arrivals Feb 2020
Australian holiday arrivals are balanced throughout the entire year. They make up 27% of holiday arrivals but over winter this is 43%.

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)**

<table>
<thead>
<tr>
<th>Days</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>1-3 DAYS</td>
<td>11%</td>
</tr>
<tr>
<td>4-7 DAYS</td>
<td>35%</td>
</tr>
<tr>
<td>8-14 DAYS</td>
<td>38%</td>
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<tr>
<td>15-21 DAYS</td>
<td>11%</td>
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<tr>
<td>22+ DAYS</td>
<td>5%</td>
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**Popular Activities**

- **Wildlife Activities**: 71% of all international visitors who ski are Australian.
- **Water Activities**: 71% of all international visitors who ski are Australian.
- **Museums, Galleries and Live Performances**: 71% of all international visitors who ski are Australian.
- **Adventure Tourism**: 71% of all international visitors who ski are Australian.

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

**ACTIVE CONSIDERER PROFILE**

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

**TOTAL ACTIVE CONSIDERERS**

- Approximate number of Australian Active Considerers (Dec 2019): 5.8M

**AGE SEGMENT OF ACTIVE CONSIDERERS**

- 18-24: 13%
- 25-54: 64%
- 55-74: 23%

**TERTIARY EDUCATION OF ACS (BACHELOR’S DEGREE OR HIGHER)**

- AC: 46%
- Non-AC: 29%

**HOUSEHOLD INCOME SPREAD ACS VS NON-ACS**

- < $70K AUD: AC 39%, Non-AC 53%
- $70K - $109K AUD: AC 31%, Non-AC 27%
- > $110K AUD: AC 30%, Non-AC 19%

**ACTIVE CONSIDERERS LIVE MAINLY ON THE EASTERN SEA BOARD**

- Queensland: 21%
- Western Australia: 8%
- New South Wales: 31%
- Victoria: 26%
- South Australia: 9%

ACs are more likely to have a higher household income.
Appeal of and preference for NZ as a holiday destination has remained high during the Covid-19 pandemic.

- **67%** of online audience aged 18-74 find New Zealand appealing as a destination.
- **32%** of online audience aged 18-74 are active considerers.
- **63%** of active considerers rank New Zealand #1 or #2 as a preferred destination.

*Metrics are from April 2020*
Australia
Active considerer mindset

What do active considerers want from a holiday in New Zealand?

- 53% to have fun and enjoy myself
- 51% to feel relaxed
- 47% to learn and explore new things
- 46% to take a break from routine life
- 45% to get in touch with nature

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

What do they need more information about?

- How safe is it to participate in adventure activities? 24%
- How safe is it from crime? 23%
- How long it takes to travel between the main attractions? 23%
- What is the length of time needed to experience New Zealand properly? 27%
- How easy it is to travel around? 27%

*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.

Active considerer data is from the 6 month period ending April 2020
DEMAND FOR NEW ZEALAND REMAINS STRONG, DESPITE COVID-19

72% of Australian ACs have no concern about traveling to New Zealand

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

SPEED OF NEW ZEALAND HOLIDAY DEMAND RECOVERY AFTER RESTRICTIONS ARE LIFTED

<table>
<thead>
<tr>
<th>Timeframe</th>
<th>Cumulative</th>
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<tbody>
<tr>
<td>Within 1 month</td>
<td>8%</td>
</tr>
<tr>
<td>Within 3 months</td>
<td>23%</td>
</tr>
<tr>
<td>Within 6 months</td>
<td>49%</td>
</tr>
<tr>
<td>Within 12 months</td>
<td>86%</td>
</tr>
<tr>
<td>Much later</td>
<td>100%</td>
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Covid-19 metrics are from April 2020

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