CONSUMER PROFILE
NEW ZEALAND

AUSTRALIA CONSUMER DEMAND PROJECT

SUMMARY

Traveller Profile

Motivations for travel

New Zealand travellers choose a destination based on rich history and heritage, friendly and open citizens, good food and wine and world-class nature. A destination must also satisfy the rational factors of safety and security and value for money.

Where are they going?

The most-visited destination for New Zealand travellers is Australia by a significant margin, followed by the USA, Fiji, the UK and China.

Where do they want to go?

Australia makes it to the top of the list for New Zealand travellers in terms of aspiration, awareness of holiday experiences and intention to visit. The UK and the USA (ex. Hawaii) are strong competitors, particularly given their reduced proximity.

Who do they travel with?

Just under half of New Zealand consumers travel as a couple.

Perceptions of Australia

Australia is well-placed to deliver on the importance factors which are most highly ranked among New Zealand travellers, with Australia being ranked in first position for all importance factors, with the exception of history and heritage.

Traveller Behaviour

How do they prefer to travel?

- Trip length is longer than the average of international travellers, at 14 nights featuring an average of three destinations.
- Preferred styles of travel include visiting friends and family and resort holidays.
- The vast majority of New Zealand consumers participate in semi-independent or fully-independent travel as opposed to tour groups.

When do they travel?

July, September and December are the peak travel months for New Zealand consumers, with lead times typically falling between three to six months.

For travel to Australia, specifically, February-May and September-November are the peak travel periods for New Zealand travellers.

How do they plan to travel?

For early planning and inspiration, New Zealand travellers are using a combination of online and offline sources, including talking to friends and family, searching the internet, and visiting online flight and hotel booking sites.

How do they book travel?

When it comes to booking, the majority are doing so either directly via an airline's website or via a travel agent (by telephone or in person).

tripadvisor®

TripAdvisor Facts

New Zealand is the fourth largest international market viewing Australia on TripAdvisor, at 6.8% of all sessions. In 2016 this figure increased by 9.3% year-on-year. Despite New Zealand's position as the fourth largest international market viewing Australia, this represents a relatively small market share of all the international destinations they are searching.

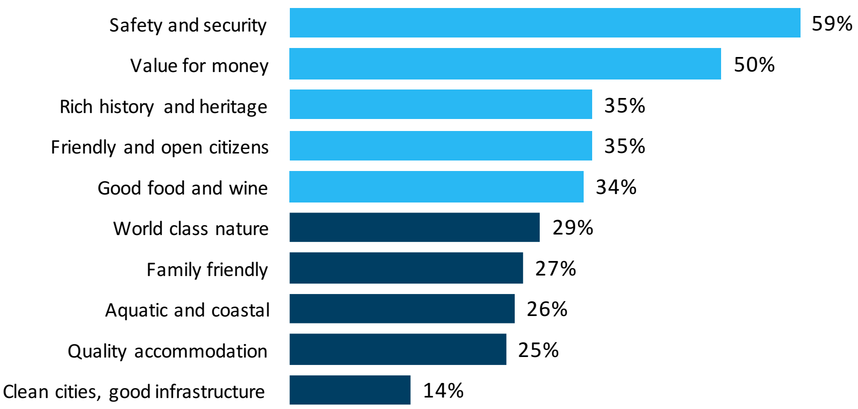
Traveller Snapshot 2017 Sources: 1. Tourism Australia, Consumer Demand Project, 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016. 3. TripAdvisor, Internal Data, December 2016.

NEW ZEALAND TRAVELLER PROFILE

The information in this fact sheet comes from Tourism Australia's (TA) international consumer research study the 'Consumer Demand Project' (CDP). The CDP was set up in 2012 to look into how global consumers view Australia and what most motivates them to visit.

Insights from the CDP have been used extensively to inform and support development of TA's strategic direction, campaign development as well as to inform the tourism industry of potential opportunities to build the value of Australian tourism. The research is used to help shape the future marketing of Australia and identify opportunities to make the country's tourism offering more attractive to overseas visitors.

Most important factors when selecting a holiday destination



Read as: 59% of respondents rate 'safety and security' among the top five most important factors when choosing a holiday destination.

MARKET OVERVIEW

In 2016, New Zealand was Australia's largest inbound market for visitor arrivals, fourth largest market for total visitor spend and third for visitor nights.

1,347,000
Visitor arrivals[1]
(↑ 3 per cent)

Holiday◊§	Visiting friends & relatives◊§
40%	34%

Business◊§	Other◊§‡
17%	9%

$2.7bn
Total spend[2]
(↑ 3 per cent)

13 nights *2	7 nights **2
Average nights stayed◊	Median nights stayed◊

*Notes: *Average nights: the sum of all nights divided by the sum of all visitors. **Median nights: represents the midpoint length of stay for which 50% of visitors stay less and 50% stay longer, removing the impact of very long stay visitors. ◊ Data refers to an average of 2012-2016. § Refers to share of arrivals of respective purpose. ‡ Other includes education, employment and others.*
Sources: 1. Department of Immigration and Border Protection, December 2016. 2. Tourism Research Australia, International Visitor Survey, December 2016.

AUSTRALIA'S POSITION AND OPPORTUNITY

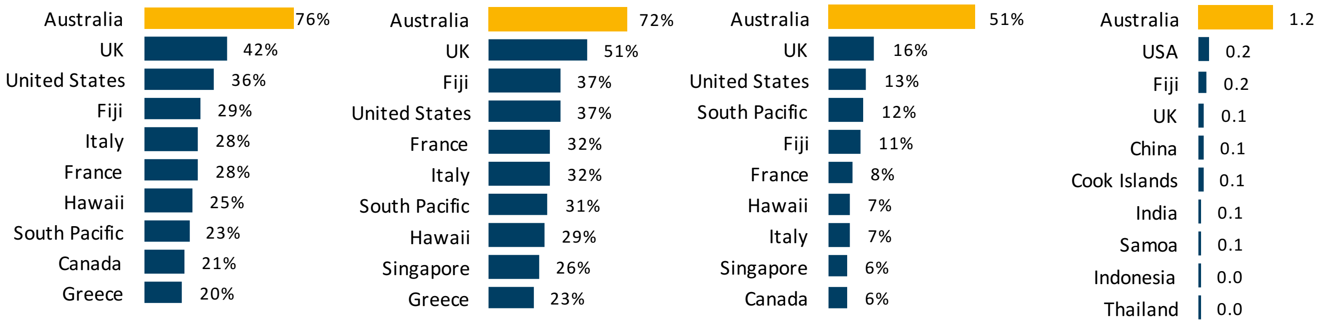
Purchase funnel

Aspiration
Which of the following destinations are you *considering travelling* to in the next 4 years?

Awareness of holiday experiences
How aware would you say you are of the holiday experiences on offer in the following destinations?

Intention
Which of the following destinations are you *actively planning* to visit for a holiday in the next 2 years?

Visitation
Millions of trips in 2016[1]



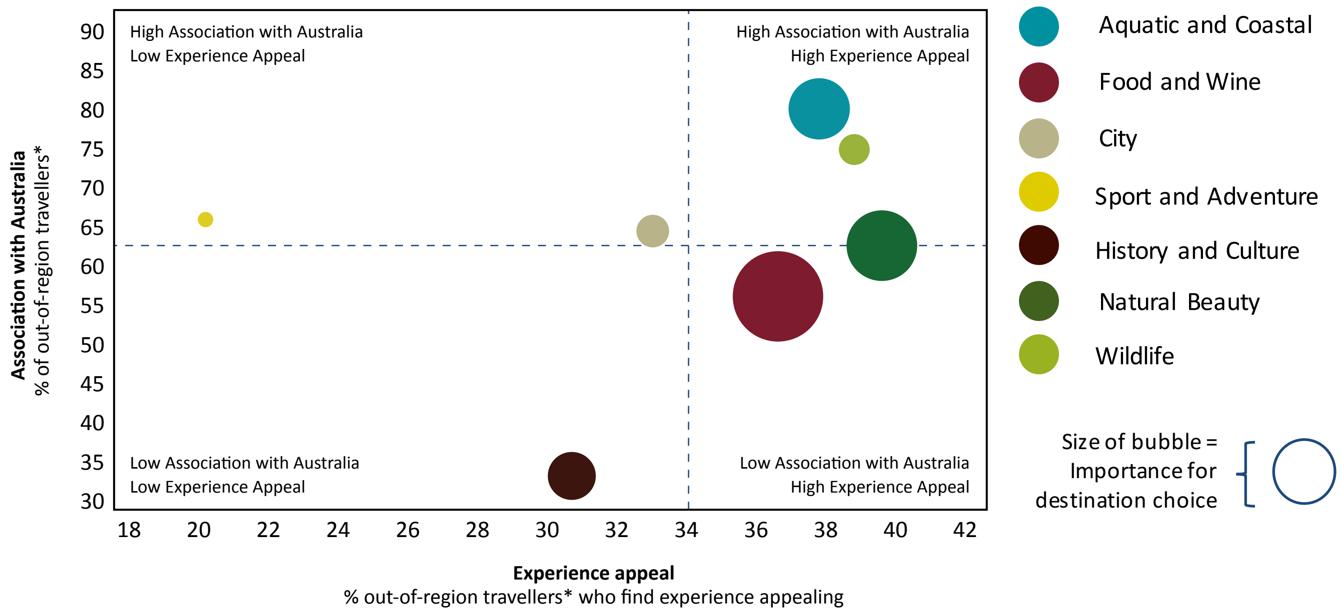
Read as: 76% of New Zealand consumers are considering travel to Australia in the next 4 years, while 51% are intending to visit in the next 2 years. Australia is ranked #1 for visitation against other out-of-region (OOR) destinations for New Zealand travellers.

*Notes: *Hawaii is included in US for visitation figures as cannot be separated. Sources: 1. Tourism Economics, YE2016.*

Opportunity matrix

The opportunity matrix is a comprehensive way to showcase the opportunity for Australian tourism through identifying the key thematic appeals and experience categories.

Among the New Zealand market, Australia performs strongest with respect to aquatic and coastal experiences. These types of experiences have a strong level of appeal and association with Australia (higher and to the right), while natural beauty experiences are considered slightly more important (larger bubble). Food and wine experiences, while important, generate average levels of association with Australia among this market.



Read as: Food and wine experiences are very important among the New Zealand market, and while there is a high level of tested appeal for Australia's food and wine experiences, the unprompted association with these types of experiences is average.

*Notes: *Out-of-region travellers refers to consumers travelling outside their region of residence.*

TOURISM AUSTRALIA

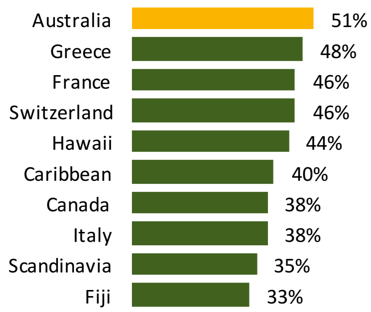
NATURE AND WILDLIFE

How does Australia rate?

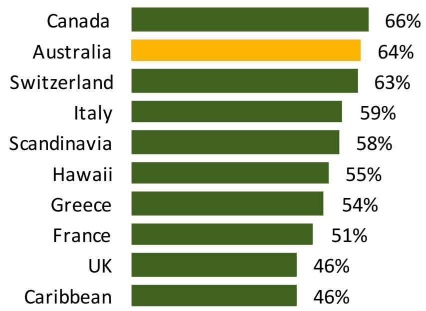
Respondents were asked to indicate which destinations they associated with the following factors.
Each respondent was provided with a list in excess of 50 international destinations.

World class nature

Respondents who have not visited Australia



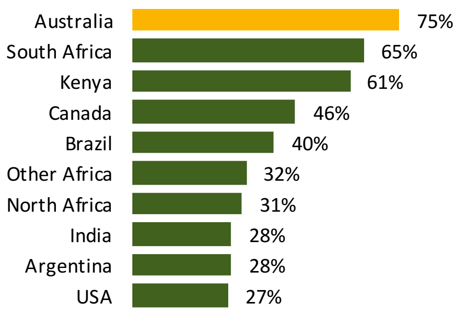
Respondents who have visited Australia



Read as: 51% of respondents who have not visited Australia associate Australia with ‘world class nature.’ This figure rises to 64% among those who have visited.

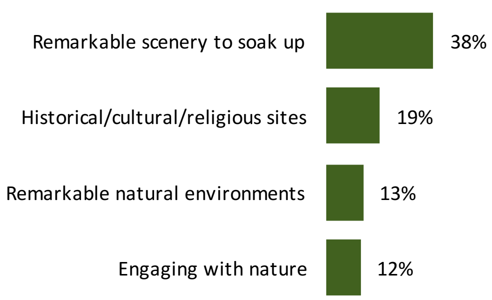
Unique and interesting wildlife

Total respondents



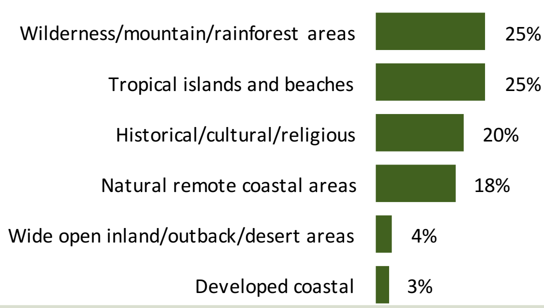
Read as: 75% of total respondents associate Australia with ‘unique and interesting wildlife.’

Elements of ‘world class nature’



Read as: 38% of respondents said that ‘remarkable scenery to soak up’ is a key element of ‘world class nature’.

Most important types of ‘world class nature’



Read as: 25% of respondents said ‘wilderness/mountain/rainforest’ environments are an important type of ‘world class nature’.

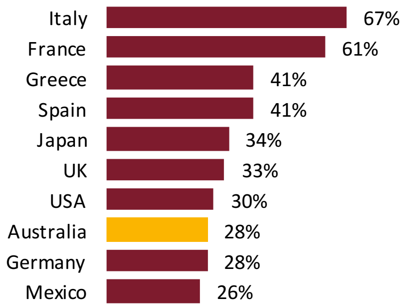
FOOD AND WINE

How does Australia rate?

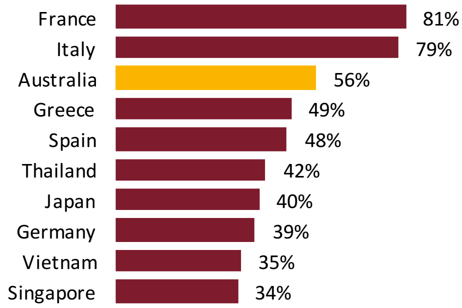
Respondents were asked to indicate which destinations they associated with the following factors. Each respondent was provided with a list in excess of 50 international destinations.

Good food and wine

Respondents who have not visited Australia

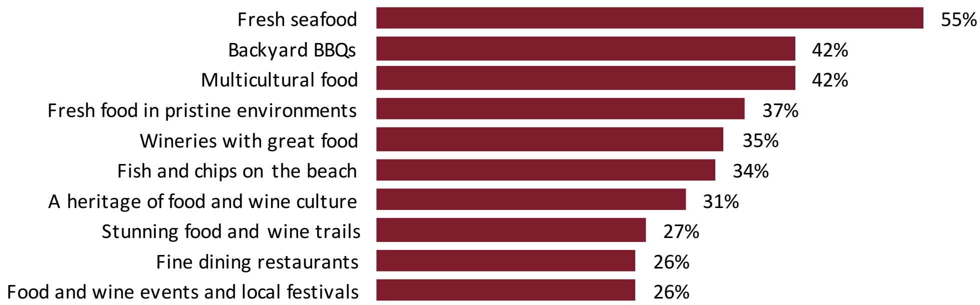


Respondents who have visited Australia



Read as: 28% of respondents who have not visited Australia associate Australia with 'good food and wine.' This figure rises to 56% among those who have visited.

Current associations with Australian food and wine

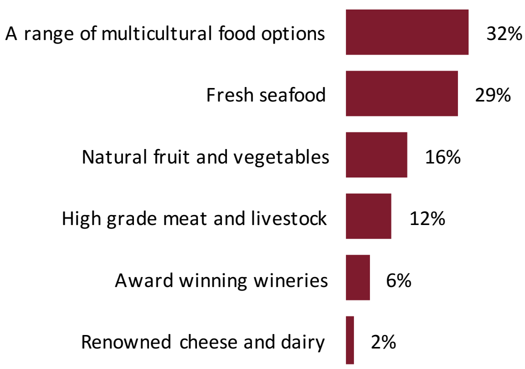


Read as: 55% of respondents associate Australian food and wine with 'fresh seafood'.

Elements of 'good food and wine'

Read as: 28% of respondents said 'interesting street-food' is a key element of 'good food and wine.'

Important types of 'good food and wine'



Read as: 32% of respondents said 'a range of multicultural food options' is an important type of 'good food and wine'.

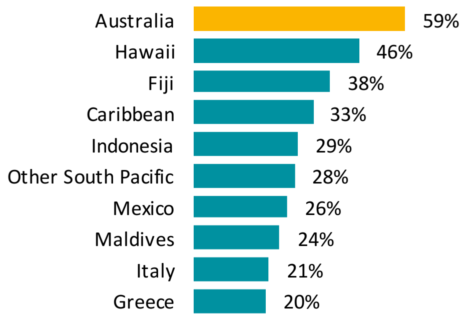
AQUATIC AND COASTAL

How does Australia rate?

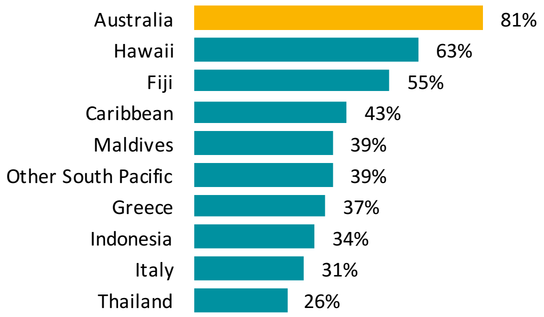
Respondents were asked to indicate which destinations they associated with the following factors.
Each respondent was provided with a list in excess of 50 international destinations.

Aquatic and coastal

Respondents who have not visited Australia



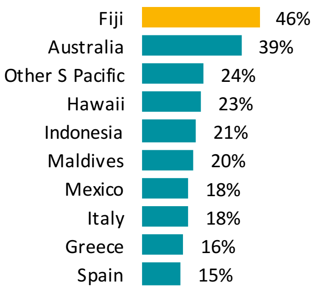
Respondents who have visited Australia



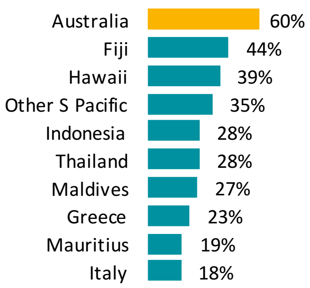
Read as: 59% of respondents who have not visited Australia associate Australia with 'aquatic and coastal' experiences. This figure rises to 81% among those who have visited.

Remote coastal, beach and aquatic locations

Respondents who have not visited Australia



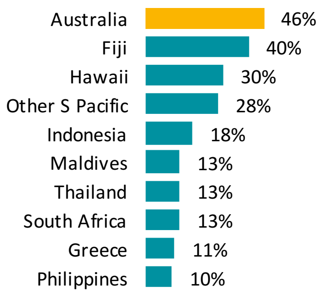
Respondents who have visited Australia



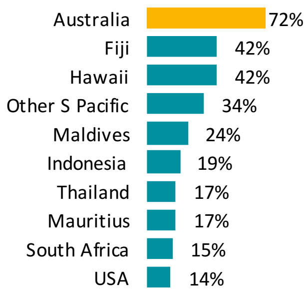
Read as: 60% of respondents that have visited Australia associate Australia with 'remote coastal, beach and aquatic locations'.

Aquatic wildlife

Respondents who have not visited Australia



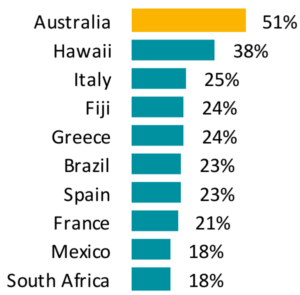
Respondents who have visited Australia



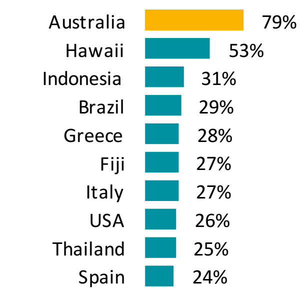
Read as: 72% of respondents that have visited Australia associate Australia with 'aquatic wildlife'.

Developed coastal and beach locations

Respondents who have not visited Australia



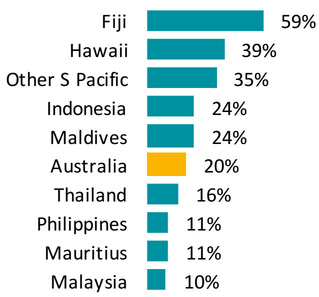
Respondents who have visited Australia



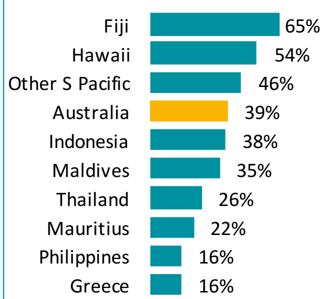
Read as: 79% of respondents that have visited Australia associate Australia with 'developed coastal and beach locations'.

Tropical islands and locations

Respondents who have not visited Australia



Respondents who have visited Australia

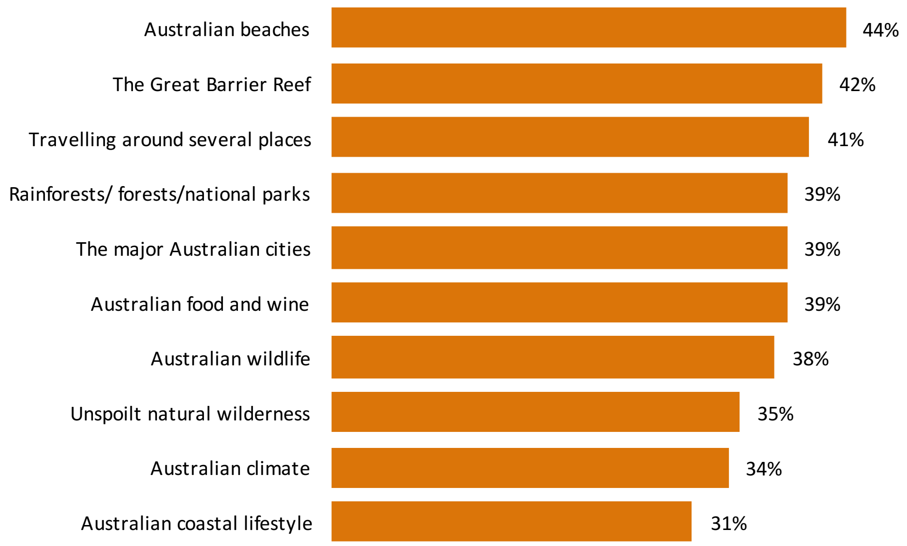


Read as: 39% of respondents that have visited Australia associate Australia with 'tropical islands and locations'.

ATTRACTIONS AND EVENTS

Attractions and events play a valuable role in attracting visitors to Australia in addition to encouraging visitors to disperse throughout the country and extend their stay.

Top 10 Australian attractions



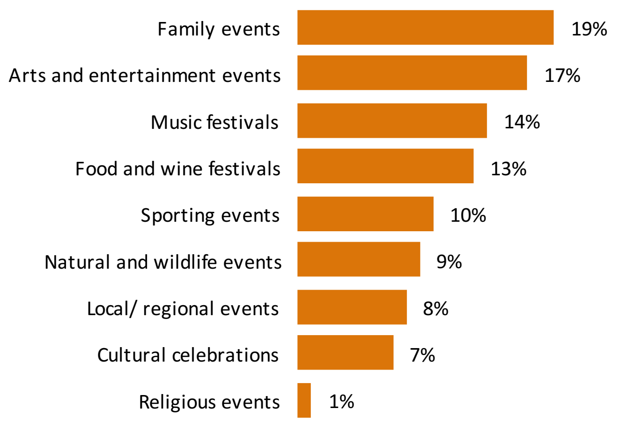
Read as: 44% of respondents indicate 'Australian beaches' as an appealing Australian attraction.

Leisure events

Respondents were asked to what extent they agreed with the following statement:
When travelling internationally I always look to time my trip and places visited with an event or festival of interest.

Read as: 23% of respondents indicate that they always look to time their trip and places visited with an event or festival of interest.

Most appealing events to attend overseas



Read as: 19% of respondents indicate 'family events' as appealing elements when travelling overseas.

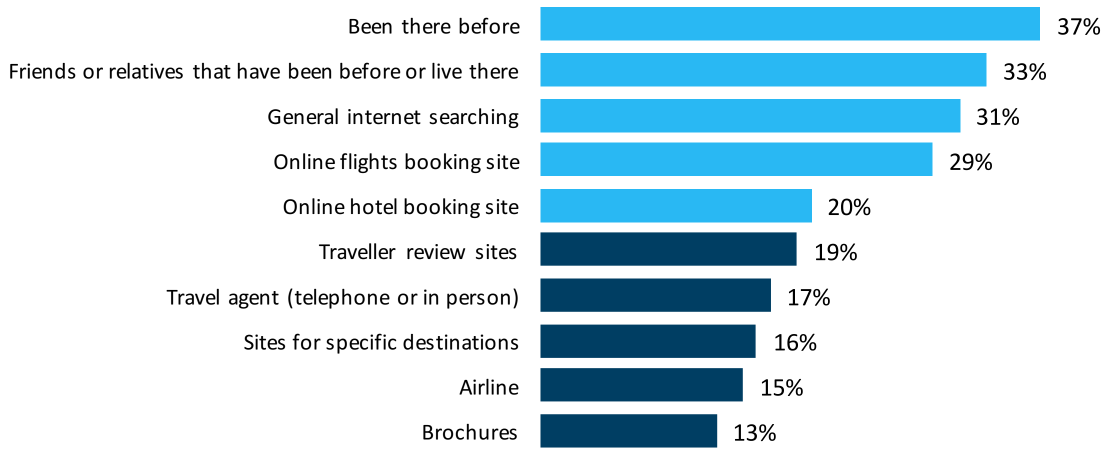
Events with the greatest influence on destination choice

Read as: 40% of respondents indicate the influence of 'major sporting events' on destination choice.

PLANNING AND BOOKING INFORMATION SOURCES

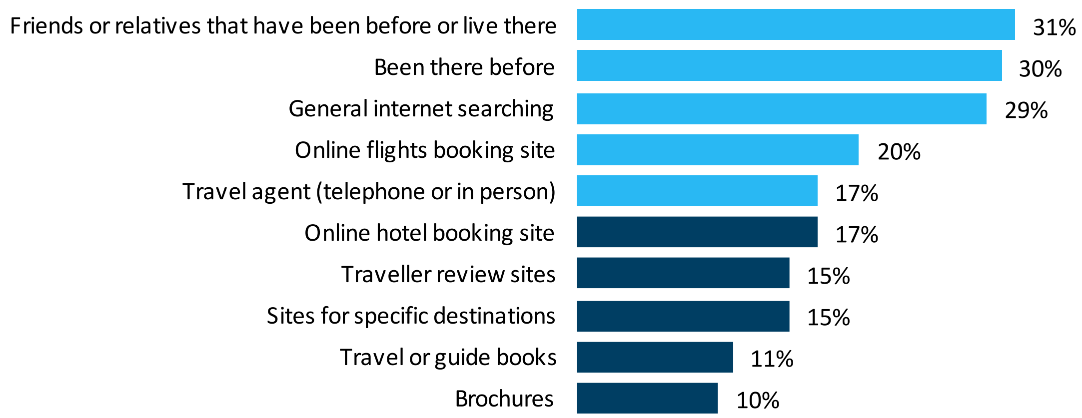
The following charts highlight the information sources that New Zealand consumers use to plan and book their holidays.

Preferred sources for *early planning and holiday inspiration*



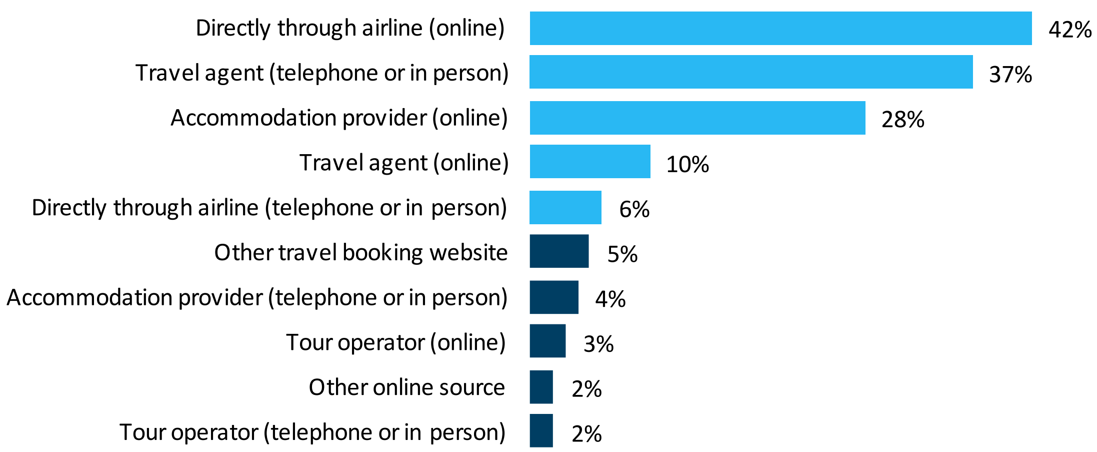
Read as: 37% of respondents indicate '(having) been there before' as a preferred source during the early stages of planning a holiday.

Preferred sources for *seeking information a holiday destination*



Read as: 31% of respondents indicate 'friends or relatives that have been before or live there' as a preferred source for seeking information about a holiday destination.

Preferred sources used to *book a holiday*



Read as: 42% of respondents indicate booking 'directly through (an) airline (online)' as a preferred source when booking a holiday.

RESPONDENT PROFILE

Gender

Male	46%
Female	54%

Age

Under 29 years	14%
30 - 39 years	20%
40 - 49 years	20%
50-59 years	20%
60-69 years	16%
70+ years	10%

Place of residence

Auckland / Northern North Island	39%
Wellington / Southern North Island	21%
Central North Island	16%
Christchurch / Central South Island	11%
Otago / Southern South Island	9%
Nelson / Northern South Island	4%

Income

Under $39,999	8%
$40,000 to $59,999	17%
$60,000 to $79,999	17%
$80,000 to $99,999	17%
$100,000 to $119,999	13%
$120,000 to $149,999	11%
$150,000 to $199,999	8%
$200,000 to $299,999	4%
$300,000 or more	6%

Living situation

Partner	38%
Partner and kids	36%
Alone	10%
Housemates	6%
Parents	4%
Single parent	3%
Relatives/family	2%
Other	1%

Employment status

Work full time	54%
Work part time	18%
Retired	14%
Home duties	5%
Full time student	3%
Looking for work	3%
Other	1%

Occupations

Professional	37%
Manager	14%
Clerical and admin	13%
Labourer / trade	11%
Self-employed	10%
Other	6%
Community worker	4%
Sales worker	4%
Farmer	1%

ABOUT THE RESEARCH

The Consumer Demand Project (CDP) research is carried out by BDA Marketing Planning, a consultancy who specialise in international demand side strategy development and consumer research. It helps determine the strategic priorities to achieve the Tourism 2020 goal, by providing a comprehensive assessment of Australia's current destination appeal and the latent demand potential. The research is conducted annually across eleven of Australia's key tourism markets: China, Germany, India, Indonesia, Japan, Malaysia, New Zealand, Singapore, South Korea, UK and USA. In 2016, the following markets were integrated into the program: Hong Kong, Taiwan, Canada, Brazil, France and Italy. Over the last five years, Tourism Australia have spoken to over 90,000 international long-haul travellers via online research panels.

WANT TO KNOW MORE?

Fact sheets for seventeen of Australia's key tourism markets can be accessed at: http://www.tourism.australia.com/statistics/consumer-demand-research.aspx

For more information, please contact:

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