

# NEW ZEALAND | MARKET PROFILE 2018-19

## MARKET OVERVIEW

### NEW ZEALAND LEISURE VISITATION TO WA<sup>1</sup>

- **56,400** leisure visitors to WA
- WA's **4th largest** international market by leisure visitors
- **\$64.4 million** spent by leisure visitors in WA\*
- Average daily spend: **\$98**
- Average length of stay: **12 nights**

### VISITORS AND SPEND IN WA BY PURPOSE<sup>1</sup>

#### Holiday



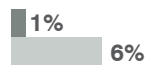
#### Visiting Friends and Relatives



#### Business



#### Education



#### Other

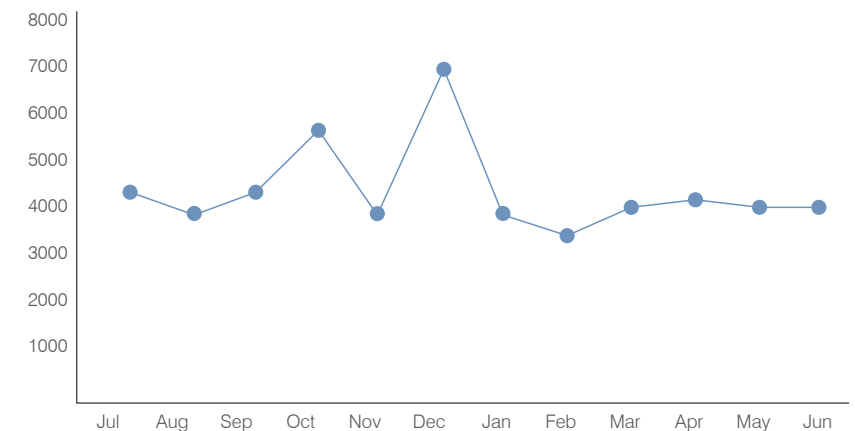


### NEW ZEALAND LEISURE VISITATION TO AUSTRALIA<sup>1</sup>

- **968,400** leisure visitors to Australia
- Australia's **2nd largest** international market by leisure visitors

### SEASONALITY - SHORT-TERM LEISURE VISITOR ARRIVALS TO WA<sup>2</sup>

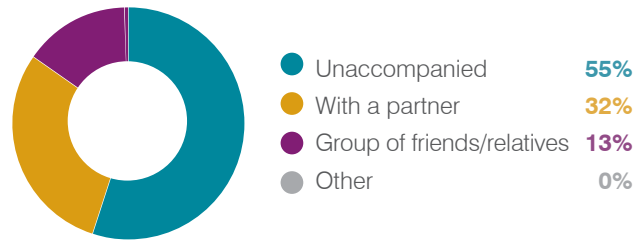
Arrivals peaked around the Christmas holiday period.



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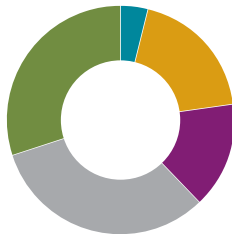
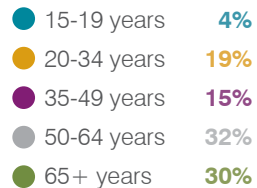
## TRIP PROFILE

### TRAVEL PARTY<sup>4</sup>

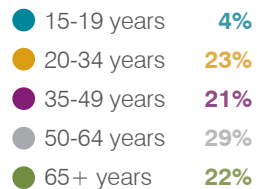


### LEISURE VISITORS BY AGE<sup>4</sup>

#### WA

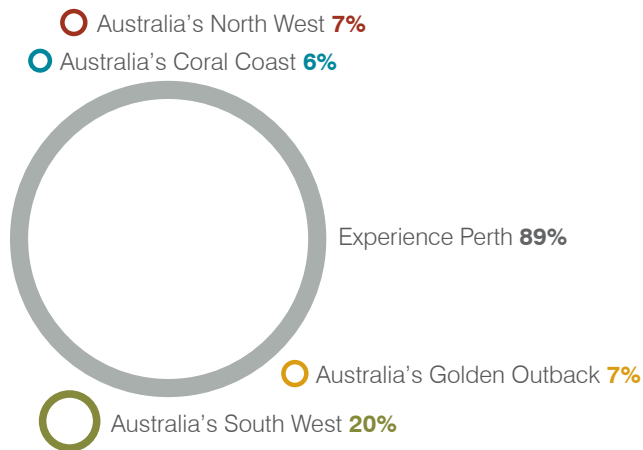


#### Australia



### REGIONAL DISPERSAL<sup>4</sup>

An average of **34%** of New Zealand leisure visitors to WA spend **at least one night in Regional WA**.



### TRAVEL PACKAGES<sup>4</sup>

**8%** of New Zealand leisure visitors to WA arrived on a **travel package**

*(i.e. paid for their flight to Australia and at least one other component of their trip as one packaged price).*

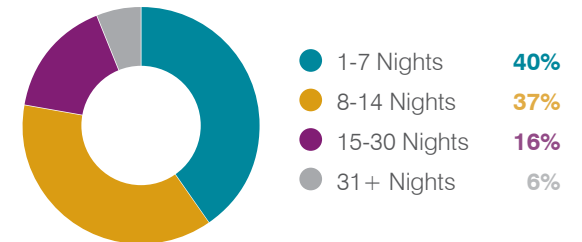
### REPEAT VISITORS<sup>4</sup>

**94%** of New Zealand leisure visitors to WA are on a **return visit** to Australia.

### OTHER STATES VISITED<sup>4</sup>

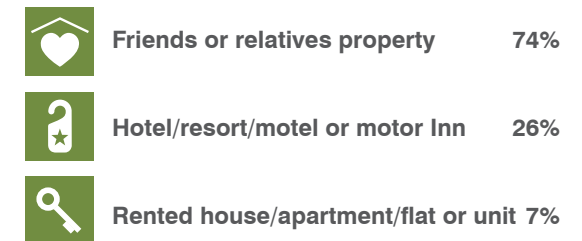
**Three quarters (73%)** of New Zealand leisure visitors to WA **only visit WA** on their trip.

### LENGTH OF STAY – LEISURE VISITORS TO WA<sup>4</sup>



### TOP 3 ACCOMMODATION CHOICES FOR LEISURE VISITORS TO WA<sup>4</sup>

Proportion staying in this accommodation type (%)



**6%** of New Zealand visitors to WA caravan or camp, equivalent to an average of **3,300** New Zealand visitors a year<sup>4^</sup>

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## MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

**High Value Travellers** (HVTs) are a new target audience for Tourism Western Australia.

### DEFINITION OF A HIGH VALUE TRAVELLER



Travel Long Haul



Considering or intending to visit Australia.



Motivated by nature and wildlife, aquatic and coastal, and food and wine experiences



Represent "high value": above average trip expenditure, and a higher likelihood to stay longer and disperse further

### WHAT NZ HVTs ARE LOOKING FOR IN A HOLIDAY DESTINATION GENERALLY<sup>3</sup>



World class nature & wildlife



A safe and secure destination



Good food, wine, local cuisine and produce



A destination that offers value for money



World class coastlines, beaches and marine wildlife

### HVTs BARRIERS TO VISITING AUSTRALIA<sup>3</sup>

For travellers from New Zealand, **competition from other destinations** is the primary barrier to visiting Australia. NZ travellers are more inclined to feel they have 'been there, done that' than other markets, or to **put off a visit** for another time. There is a need to foster a **sense of urgency** to visit by continuing to raise awareness of the experiences and offerings that are **unique to WA**.

#### Top 3 Barriers to visiting Australia



Other places I'd prefer to go



Already been there & want to see other places



It is easy to put off for another time

### HVTs DESTINATION CHOICE AND FIRST BOOKING TIMEFRAMES<sup>5</sup>

Based on last out of region holiday

According to their last holiday, New Zealanders tend to **decide on their holiday destination and make their first booking 3-6 months ahead of the trip**.

### HVTs TOP SOURCES FOR INSPIRATION, INFORMATION & BOOKING<sup>3</sup>

#### Inspiration



Been there before



Talking to F&R



General Internet searching



Online flights booking site



Travel agent (offline)

#### Booking



##### Flights

Airline (online)  
Travel agent (offline)  
Travel website/app



##### Activities

Operator (online)  
Operator (offline)  
Travel agent (offline)



##### Accommodation

Travel website/app  
Accomm. Provider (online)  
Travel agent (offline)

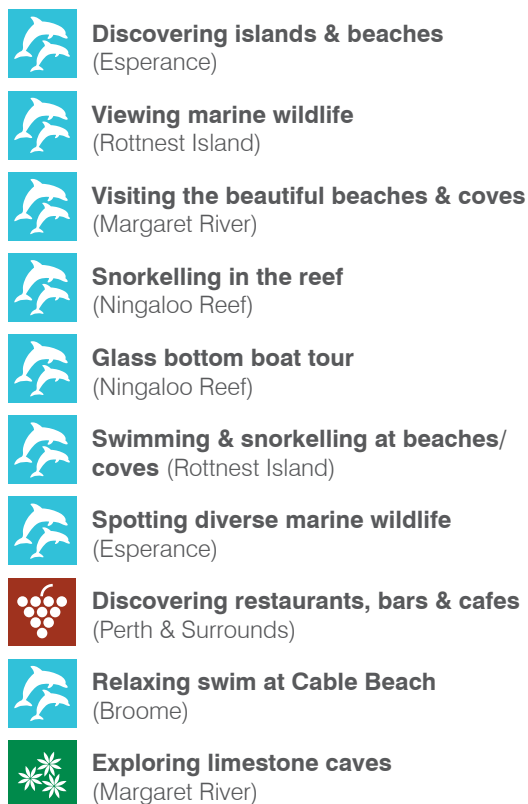
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## APPEALING WA DESTINATIONS AND EXPERIENCES

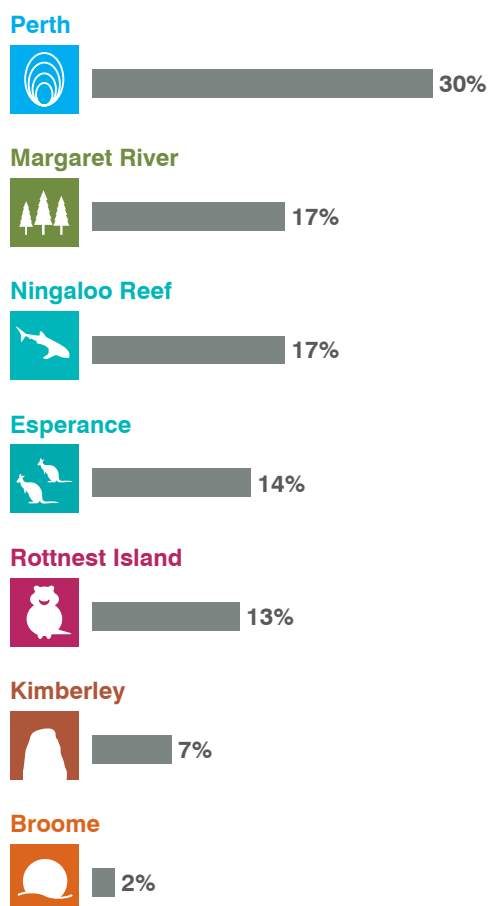
In research undertaken in 2018, **NZ HVTs** were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

These results indicate that NZ HVTs have a strong preference **aquatic and coastal experiences** over a range of destinations.

### MOST APPEALING EXPERIENCES<sup>5</sup>



### MOST APPEALING DESTINATION<sup>5</sup>



### WHY THESE DESTINATIONS AND EXPERIENCES APPEAL<sup>5</sup>

#### Perth & Surrounds

*"I like to choose places that have as many things as possible to do"*

*"Civilisation & easier to travel to. Metro but close enough to nature"*

*"The city and what it has to offer within a close travelling area"*

#### Margaret River

*"Heard there are some great wineries and restaurants there"*

#### Ningaloo Reef

*"This reef might be less tourist-crowded than the great barrier reef but with the same sea life"*

### Notes

\* Expenditure excludes pre-paid package spend.

'Leisure' comprises both holiday visitors and those visiting friends and relatives (VFR).

^ 'Caravan and camping visitors' spent at least one night in commercial or non-commercial caravan or camping accommodation while on their trip.

### References

1. Tourism Research Australia – International Visitor Survey, YE Jun 19
2. Australian Bureau of Statistics via Tourism Research Australia – Visitor Arrivals and Departures (State of Stay: WA, Category of Traveller: Short Term Visitor Arrival, Main purpose of trip: Leisure, Country (TRA benchmarks)), YE Jun 19
3. Tourism Australia – Consumer Demand Project 2019 New Zealand Report
4. Tourism Research Australia – International Visitor Survey, 3 year average (YE Jun 2017/18/19)
5. BDA – International High Value Travellers - Western Australia State Report, 2019

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**For more information,**  
**please contact:**  
**research@westernaustralia.com**