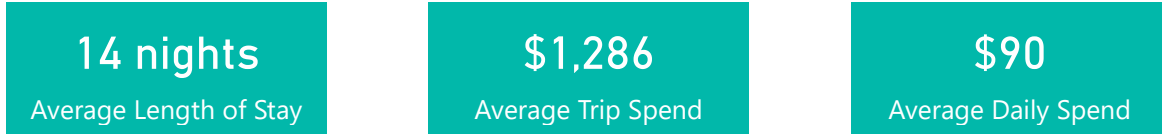


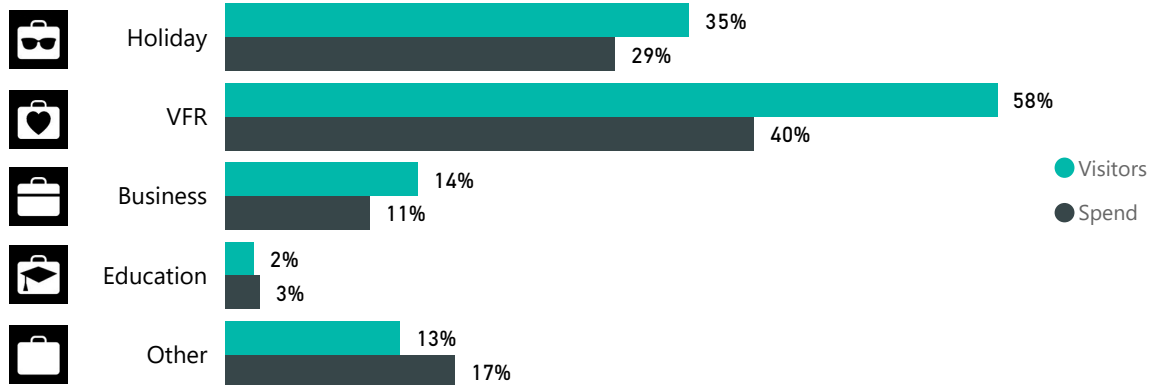
NEW ZEALAND | MARKET PROFILE 2022

MARKET OVERVIEW

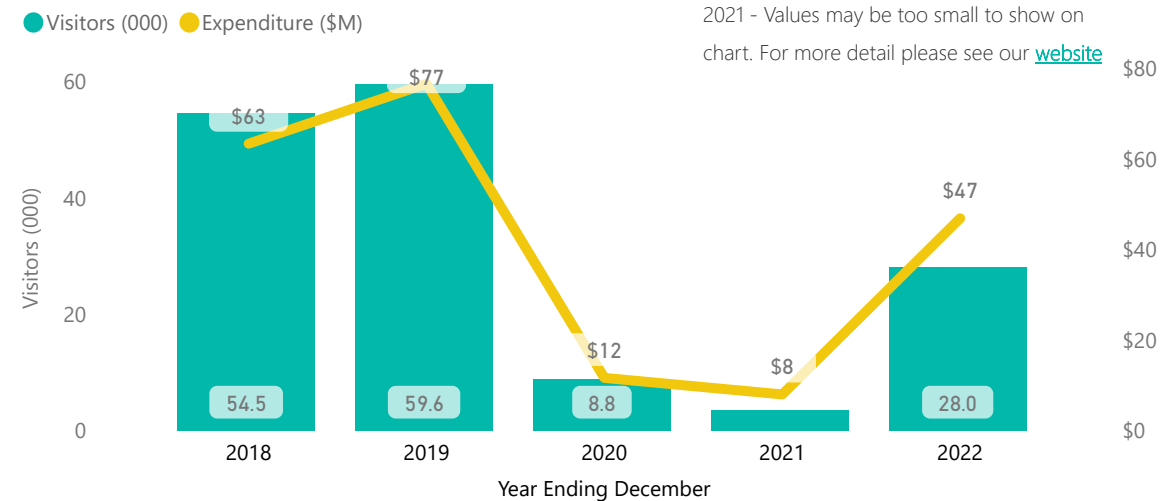
Leisure Visitation to WA¹



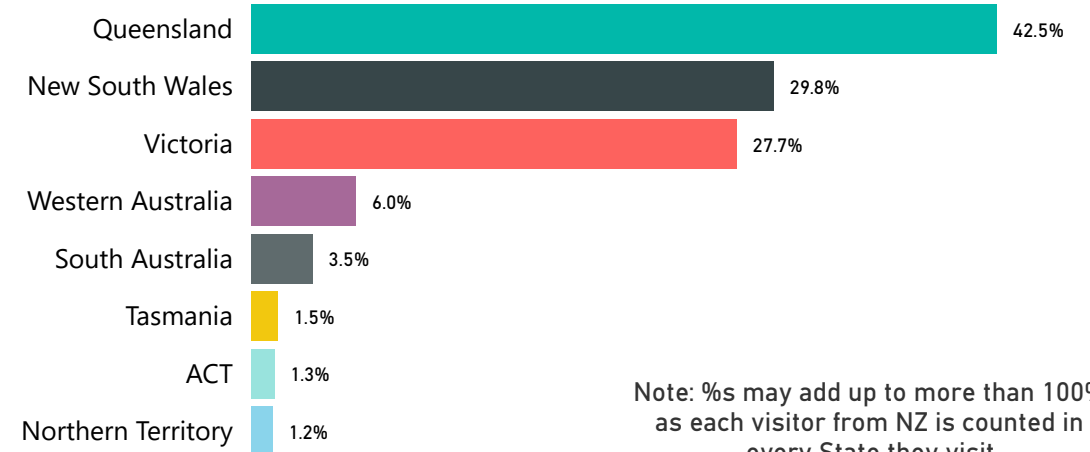
International Visitors and Spend by Purpose (WA)¹



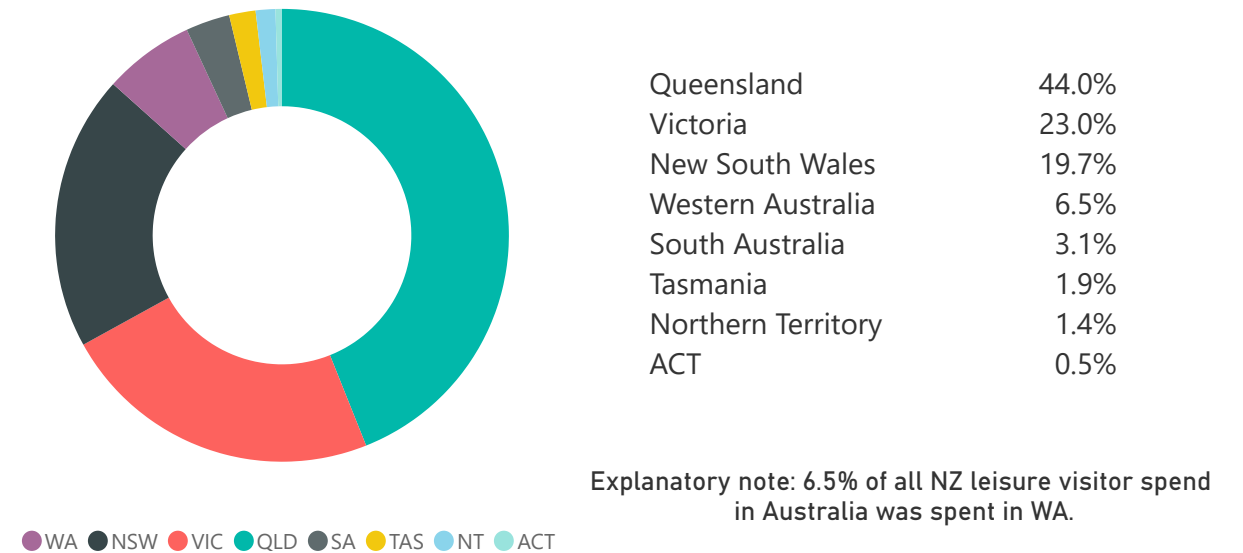
Leisure Visitation and Spend to WA²



Market Share of International Leisure Visitors to Australia¹



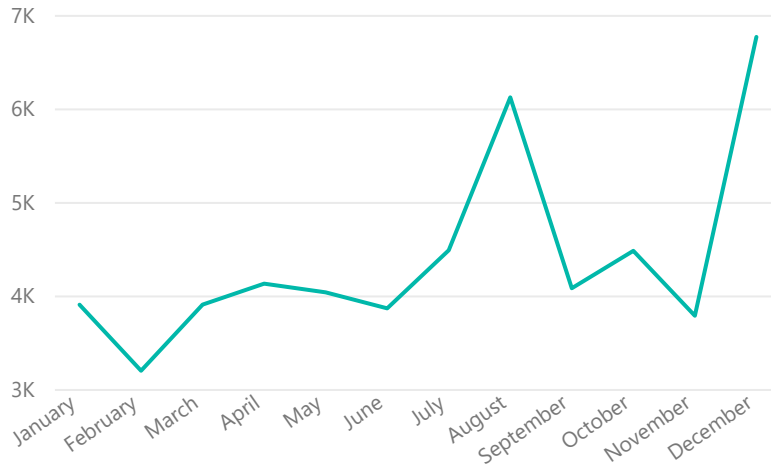
Market Share of International Leisure Visitor Spend in Australia¹



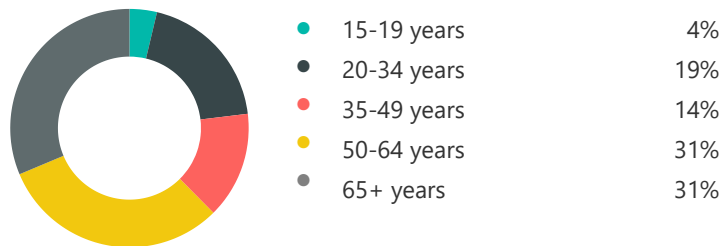
NEW ZEALAND | MARKET PROFILE

TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

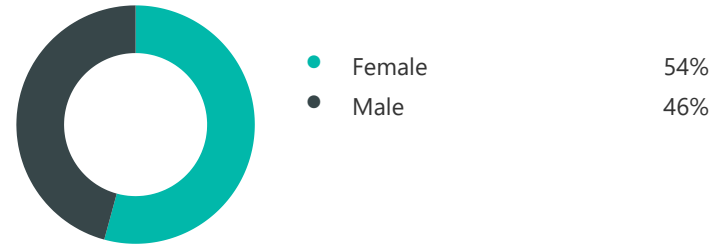
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



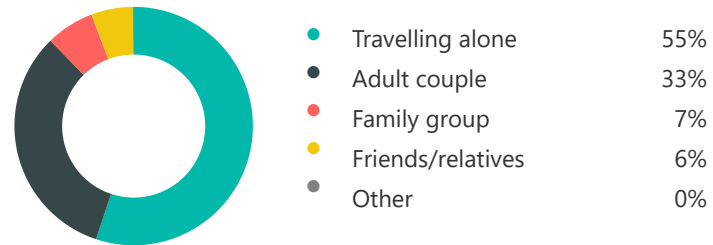
Age³



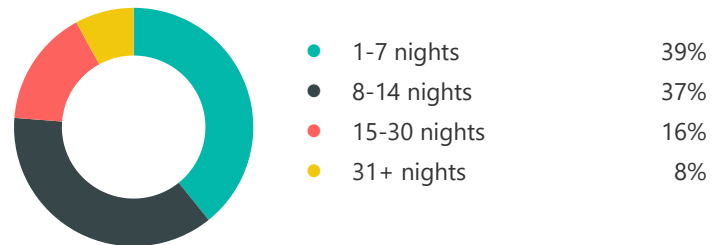
Gender³



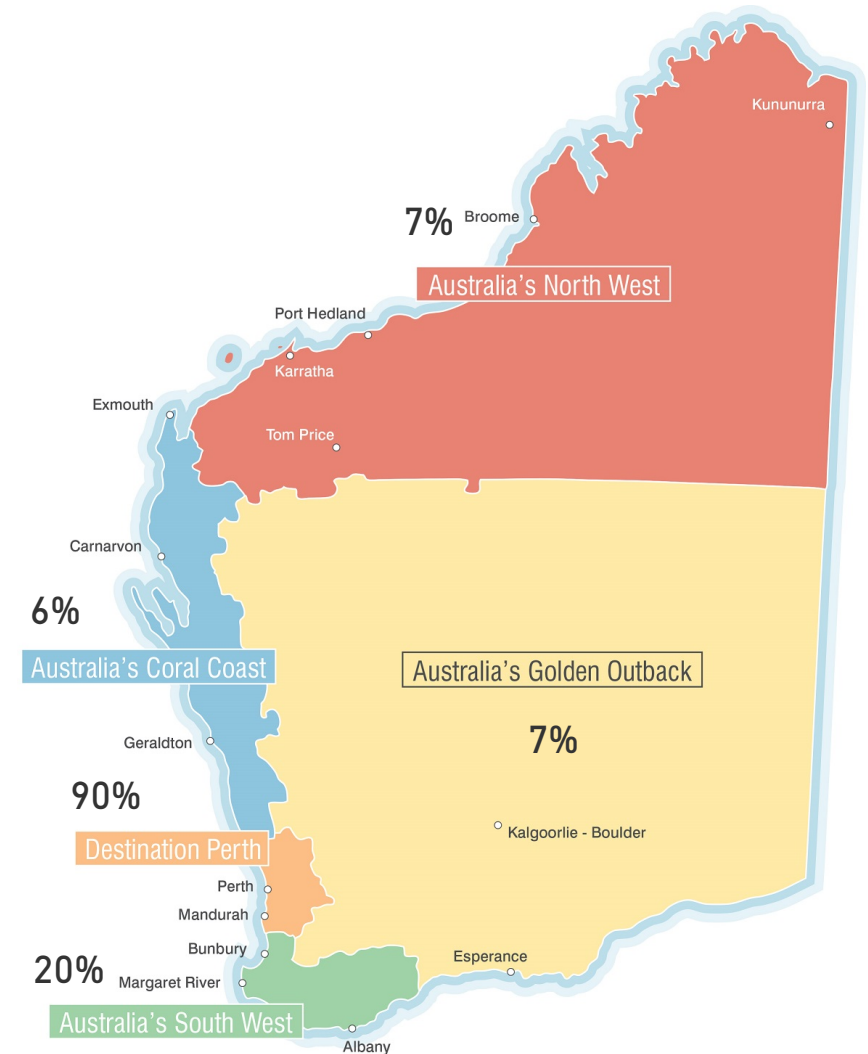
Travel Party³



Length of Trip³



Regional Dispersal³



Note: Due to the small number of international visitors to WA, trip details post 2019 cannot be provided at this time.

NEW ZEALAND | MARKET PROFILE

TRIP PROFILE (THREE YEAR AVERAGE - 2017/18/19)

Top 5 Activities for Leisure Visitors to WA³

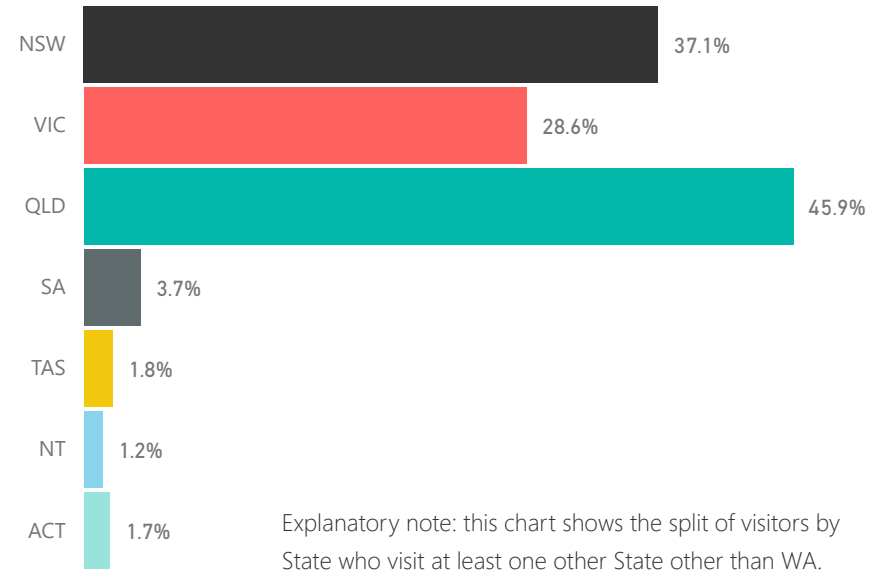
- | | | |
|---|--|-----|
| 1 | Eat out / dine at a restaurant and/or cafe | 91% |
| 2 | Go shopping for pleasure | 74% |
| 3 | Go to the beach | 60% |
| 4 | Pubs, clubs, discos etc | 47% |
| 5 | Sightseeing/looking around | 66% |

NOTE: Activity may have taken in place in WA or elsewhere in Australia during the trip.

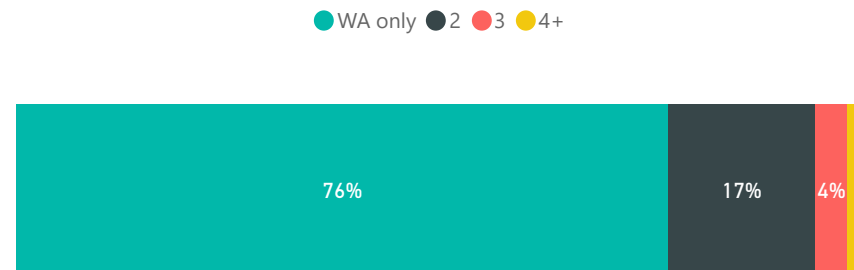
Top 3 Accommodation Choices for Leisure Visitors to WA³

- | | | |
|---|---------------------------------|-----|
| 1 | Other Private Accommodation | 77% |
| 2 | Friends or relatives property | 72% |
| 3 | Hotel/resort/motel or motor Inn | 27% |

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

99% of NZ leisure visitors to WA are free independent travellers. Equally, 99% of NZ leisure visitors to the rest of Australia are free independent travellers, so only a small proportion are likely to be on a group tour.

Repeat Visitors³

94% of NZ leisure visitors to WA are on a return visit to Australia

Travel Packages³

6% of NZ leisure visitors to WA arrived on a travel package

NEW ZEALAND | MARKET PROFILE

MOTIVATIONS, BARRIERS, PLANNING AND BOOKING

Definition of a High Yield Traveller (HYT)



Willing to travel out of their region.



High overall trip expenditure with a minimum of \$200 per person per night

What HYTs are looking for in a holiday destination generally ⁶

- 1 Safety & security
- 2 Value for money
- 3 Good food & wine
- 4 Friendly citizens
- 5 Family friendly

Safety and value for money are clearly most important for New Zealand, both have become more important in recent times and are more important in NZ than for other markets. Good food and wine and friendly citizens are also important.

HYTs Destination Choice and First Booking Timeframes ⁵

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.

HYTs Top Sources for Inspiration, Information & Booking ⁵

Inspiration

- 1 Been there before
- 2 Talking to F&R
- 3 General internet searching
- 4 Online flights booking site
- 5 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)

Top 5 Barriers to HYTs visiting Australia ⁶

- 1 Expensive airfares
- 2 There are other places I would prefer to travel to/ have planned to travel to
- 3 High cost of travelling around
- 4 The current financial/economic situation is not favourable
- 5 I have already travelled there and now want to see other places

Competition from other destinations is the main barrier for NZ travellers who 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.

NEW ZEALAND | MARKET PROFILE

APPEALING WA DESTINATIONS AND EXPERIENCES

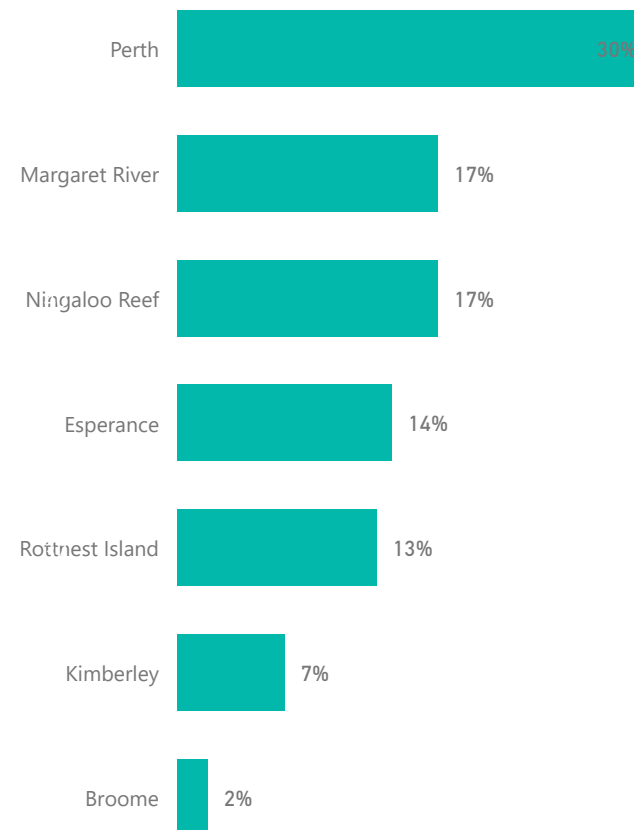
In research undertaken in 2018, NZ HYTs were shown information and pictures of selected WA destinations and experiences. They were then questioned about those selected destinations and experiences, and the results are shown below.

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

Most Appealing Experiences⁷

- 1 **Discovering islands & beaches**
(Esperance)
- 2 **Viewing marine wildlife**
(Rottnest Island)
- 3 **Visiting the beautiful beaches & coves**
(Margaret River)
- 4 **Glass bottom boat tour**
(Ningaloo Reef)
- 5 **Snorkelling in the reef**
(Ningaloo Reef)
- 6 **Swimming & snorkelling at beaches/coves**
(Rottnest Island)
- 7 **Spotting diverse marine wildlife**
(Esperance)
- 8 **Discovering restaurants, bars & cafes**
(Perth & Surrounds)
- 9 **Relaxing swim at Cable Beach**
(Broome)
- 10 **Exploring limestone caves**
(Margaret River)

Most Appealing Destination⁷



Why These Destinations and Experiences Appeal⁷

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"

Perth & Surrounds

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

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

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

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 19
2. Tourism Research Australia – International Visitor Survey, YE Dec 18/19/20/21/22
3. Tourism Research Australia – International Visitor Survey, 3 yr average, YE Dec 17/18/19
4. 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 Dec 19
5. Tourism Australia – Consumer Demand Project 2019.
6. Tourism Australia – Consumer Demand Project 2022.
7. BDA – International High Value Travellers - Western Australia State Report, 2019

Published by Tourism WA, April 2023

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