New Zealand High Value Travellers

Those identified as High Value Travellers (HVT's) engage in domestic leisure travel, spend more than the average traveller on leisure trips, and are aligned to Queensland's competitive offering, indicating they are interested in having the types of leisure experiences Queensland has to offer.

Research Background
The research has been designed to provide a better understanding of the needs, attitudes and behaviours of the New Zealand HVT segment. This research is based on an online survey of 2,997 New Zealand residents aged 18 years or more who had travelled internationally for leisure purposes within the last two years. Quotas were set to ensure the sample reflected population proportions in relation to gender and age within region. All data collection was completed in January/February 2019.

$5k +

Spent NZ$5,000+ on last trip

+

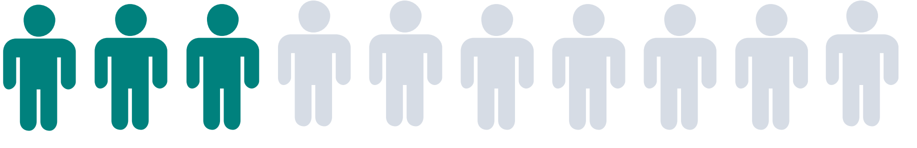
Top 3 ideal travel experiences contain 2 or more Queensland attributes

=

High
Value
Traveller

Adventure Experiences; Arts & Culture; Availability of 4-5 star (premium) accommodation; Beaches, Islands, Reef & Coastal Experiences; Dinosaurs & Pre-historic Experiences; Family Holiday Destination; Good Food & Wine/Beverages; World Class Natural Landscapes/Wildlife Experiences; Participation Events; Road Trips & Self-Guided Journeys; Great Shopping; Spectator Sports.

29% of New Zealand's outbound leisure travellers aged 18+ can be classified as High Value Travellers



490,000 New Zealanders

Worth NZ$2.5 billion p.a.

Worth NZ$266.1 million p.a. for Queensland

The High Value Traveller segment is estimated to spend NZ$2.5 billion on outbound leisure travel each year, of which more than 10 per cent (or NZ$266.1 million) is spent on travel to Queensland.

The HVT segment can be further broken down into three distinct life stage segments:

The Younger
High Value Traveller

The Family
High Value Traveller

The Older
High Value Traveller

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Younger High Value Travellers

The Younger High Value Traveller

31% of HVTs (an estimated 152,000 individuals)

Singles/couples who have never had children (typically 18-39, some in 40s)

Prominent in Auckland (38%) and Wellington (15%)

Worth NZ$840 million p.a. (and spend an estimated NZ$64.8 million p.a. on travel to Queensland)

Drivers of destination choice

Driver	%
Activities/experiences available	47%
Weather, climate or season	43%
Natural environment/scenery	39%
Family or friends I wanted to visit	34%
People/culture	34%

Sources of travel inspiration

60% Friends and family

56% General internet searches

45% Social media

40% Travel review website

Information they seek:

77% Activities, attractions and things to do
73% Accommodation
61% Transport options/schedules
56% Weather/climate

Information channels they use:

67% General internet searches
44% Friends and family
40% Travel review websites
35% Official tourism websites for destination

Booked prior to visit:

84% Accommodation
46% Activities, attractions things to do
40% Local Transport
8% None of the above

Travel motivations

Motivation	%
Quality time with family, friends or partner	55%
Relax, recharge and feel refreshed	52%
Explore and discover uniquely different places and experiences	50%
Escape from routine and pressures of everyday life	46%
To experience adventure and excitement	40%

Travel experiences on most recent trip

72% Shopping
52% Scenic sight seeing
44% Beaches, islands, reef and coastal experiences
43% City experiences and events
41% Food and beverage experiences/events
39% Visited iconic, historic and heritage landmarks
33% Walking and hiking
32% Arts and culture
29% Road trips and self guided tours

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Family High Value Travellers

The Family
High Value Traveller

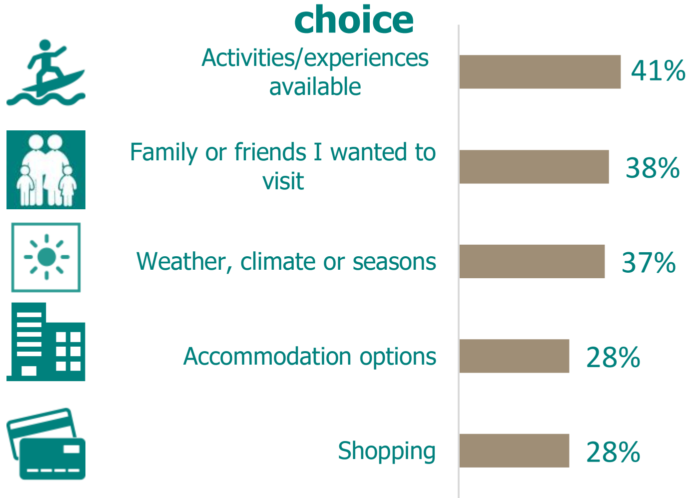
41% of HVTs (an estimated 200,000 individuals)

Singles/couples with children living at home (typically 30-59, some in 20s)

Prominent in Auckland (35%), Wellington (11%), Waikato (10%),and Canterbury (14%)

Worth NZ$786 million p.a. (and spend an estimated NZ$105.2 million p.a. on travel to Queensland)

Drivers of destination choice



Sources of travel inspiration

62% Friends and family

55% General internet searches

37% Airline websites - direct

35% Travel review website

Information they seek:

74% Accommodation
72% Activities, attractions and things to do
54% Weather/climate
53% Transport options/schedules

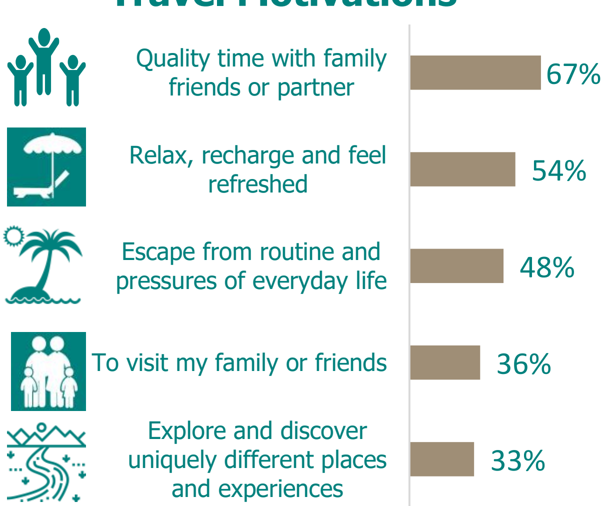
Information channels they use:

65% General internet searches
49% Friends and family
32% Travel review websites
28% Official tourism websites for destination

Booked prior to visit:

82% Accommodation
44% Local transport
42% Activities, attractions and things to do
7% None of the above

Travel Motivations



Travel experiences on most recent trip

63% Shopping
53% Family activities
50% Beaches, islands, reef and coastal experiences
44% Scenic sightseeing
42% Food and beverage experiences/events
38% City experiences and events
35% Iconic historic and heritage experiences
32% Natural landscapes and wildlife experiences
29% Theme parks

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Older High Value Travellers

The Older High Value Traveller

25% of HVTs (an estimated 122,000 individuals)

Singles/couples with children no longer living at home
(typically 50+, largest group 60-69)

Prominent in Auckland (29%), Canterbury (16%), Wellington (12%) and Waikato (10%)

Worth NZ$889 million p.a. (and spend an estimated NZ$96.1 million p.a. on travel to Queensland)

Drivers of Destination Choice

- Activities/experiences available: 46%
- Convenient travel options: 41%
- Activities/experiences available: 39%
- Family or friends I wanted to visit: 39%
- Natural environment/scenery: 38%

Sources Travel Inspiration

- 68% General Internet Searches
- 55% Friends and Family
- 43% Travel Review Website
- 41% Airline Websites - Direct

Information they seek:

70% Accommodation
63% Transport options/schedule
62% Activities, attractions and things to do
56% Weather/climate

Information channels they use:

72% General internet searches
41% Friends and family
39% Travel review websites
36% Official tourism websites for destination

Booked prior to visit:

81% Accommodation
42% Local transport
29% Activities, attractions, things to do
13% None of the above

Travel Motivations

- Quality time with family friends or partner: 56%
- Relax, recharge and feel refreshed: 56%
- Explore and discover uniquely different places and experiences: 50%
- Escape from routine and pressures of everyday life: 37%
- To experience adventure and excitement: 33%

Travel experiences on most recent trip

74% Shopping
53% Iconic, historic and heritage landmarks
52% Scenic sightseeing
50% Beaches, islands, reef and coastal experiences
48% Road trips and self-guided journeys
45% City experiences and events
38% Food and beverage experiences
37% Family activities
36% Natural landscapes and wildlife experiences
36% Arts and culture

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