

Consumer Demand Project 2019 New Zealand Market Fact Sheet



Current NZ Visitation and Expenditure in Australia¹

New Zealand travellers spent \$1.6b in Australia in the year ending September 2019, a 3.0 per cent year-on-year decrease. During the same period, visitation increased by 1.5 per cent to 1.3m and visitors stayed over 13.0m nights (stable at +0.6 per cent).



\$1.6b spend
-3.0% year-on-year



1.3m visitors
+1.5% year-on-year



13.0m nights
+0.6% year-on-year

Factors of importance when choosing holiday destination

New Zealand travellers look for safety and security when choosing a holiday destination. They are also considerably more likely than the 11 market total to seek out destinations that offer value for money.

Top five importance factors

% ranking each factor in their top five most important



% NZ travellers (%) 11 Market total²

Barriers to visiting Australia

Reasons New Zealanders cite for not visiting Australia include preferences for visiting other destinations, that they have already been here, and they can easily put it off for another time.

Top five barriers to visiting Australia

% of those not intending to visit Australia



■ NZ travellers ■ 11 Market total²

Research Background

The Consumer Demand Project (CDP) has been run annually by Tourism Australia since 2012. This involves a large sample survey conducted in each of Australia's core international markets, focusing on key demand drivers, travel behaviours and preferences, purchase funnel and brand health metrics. Beginning in 2016, Tourism and Events Queensland and other State Tourism Organisations (STOs) have partnered with Tourism Australia for the project.

Source: Tourism Research Australia Consumer Demand Project (CDP) 2019

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)

² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

Consumer Demand Project 2019 New Zealand Market Fact Sheet



Current NZ Visitation and Expenditure in Queensland¹

Visitors from New Zealand to Queensland declined by 1.7 per cent in the year ending September 2019 to 481,000, and they stayed 4.9m nights. During the same period, New Zealand visitor spend increased by 1.1 per cent to \$590.0m.



\$590.0m spend
+1.1% year-on-year



481,000 visitors
-1.7% year-on-year



4.9m nights
-2.6% year-on-year

Competitive purchase funnel

The funnel shows traveller attitudes to destinations throughout the travel planning cycle. Amongst Australian states and territories, Queensland ranked the highest amongst New Zealand travellers for consideration, experience awareness and intention. Queensland is the most visited Australian state.

Queensland's competitive rankings³

ranking against other state and territories by market

	INDO	NZ	SIN	MAL	KOR	JAP	CHI	IND	GER	USA	UK
Consideration	2	1	1	2	3	1	1	3	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Experience awareness	3	1	2	1	3	1	2	2	1	2	2
	3	1	1	3	1	1	2	3	1	2	2
Intention	3	1	1	1	2	1	1	2	2	2	2
	3	1	1	3	1	1	1	2	2	2	2
Visitation (YE Dec 2018) ⁴	4	1	4	4	2	1	3	3	2	2	2
	4	1	4	4	2	1	3	3	2	2	2

■ 2018 rank ■ 2019 rank

How to read this:
New Zealand travellers rank Queensland 1st out of Australian states and territories for consideration

Australia's competitive rankings – NZ market

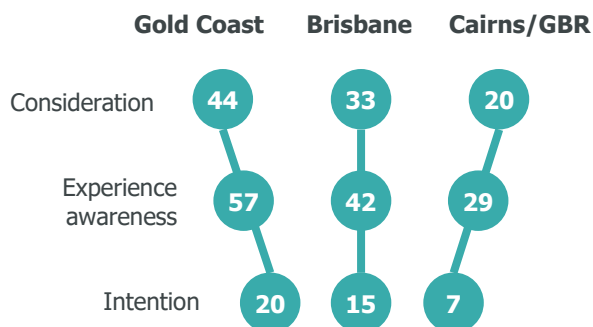
ranking against other international destinations



How to read this: Australia comes 1st in the list of destinations NZ travellers intend to visit, and ranks 1st in terms of actual visitation

Queensland destinations – NZ market

% of travellers considering Australia



How to read this: 44% of New Zealand travellers considering visiting Australia have considered visiting the Gold Coast, but only 20% intend to actually visit

¹ Tourism Research Australia, International Visitor Survey, Year Ending September 2019 (spend refers to expenditure in Australia only)
³ INDO = Indonesia, SIN = Singapore, MAL = Malaysia, KOR = South Korea, JAP = Japan, CHI = China, IND = India, GER = Germany
⁴ Tourism Research Australia, International Visitor Survey, Year Ending December 2018 (CDP visitation based on December data)

Consumer Demand Project 2019 New Zealand Market Fact Sheet



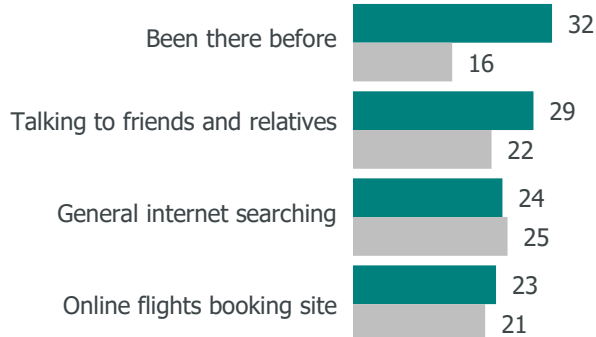
Sources for travel planning

Compared to the other markets, New Zealand consumers are more likely to rely on previous visits and the visits of friends as relatives as inspiration.

Bookings for flights were most commonly booked online through the airline. Similarly, tours and accommodation were booked directly via operators online.

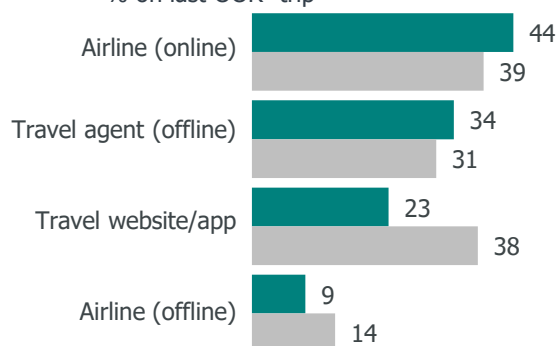
Sources of inspiration for last trip

% on last OOR⁵ trip



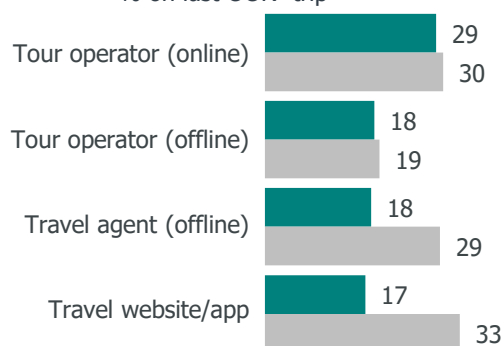
Sources used to book flights for last trip

% on last OOR⁵ trip



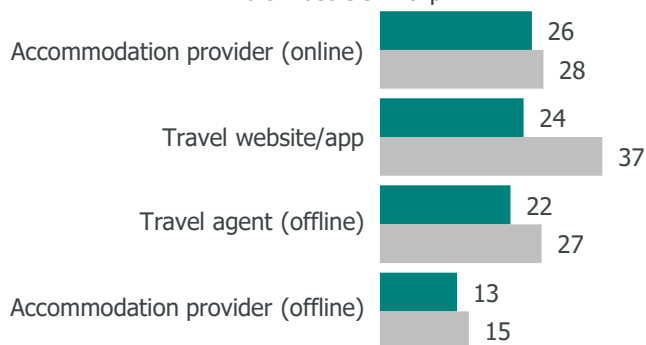
Sources used to book tours for last trip

% on last OOR⁵ trip



Sources used to book accommodation for last trip

% on last OOR⁵ trip



■ New Zealand travellers ■ 11 Market total²



² Aggregate result of all international markets surveyed: China, Germany, India, Indonesia, Japan, Malaysia, NZ, Singapore, South Korea, UK, USA

⁵ OOR Trip – Out of Region Trip (New Zealander travelling outside New Zealand)