

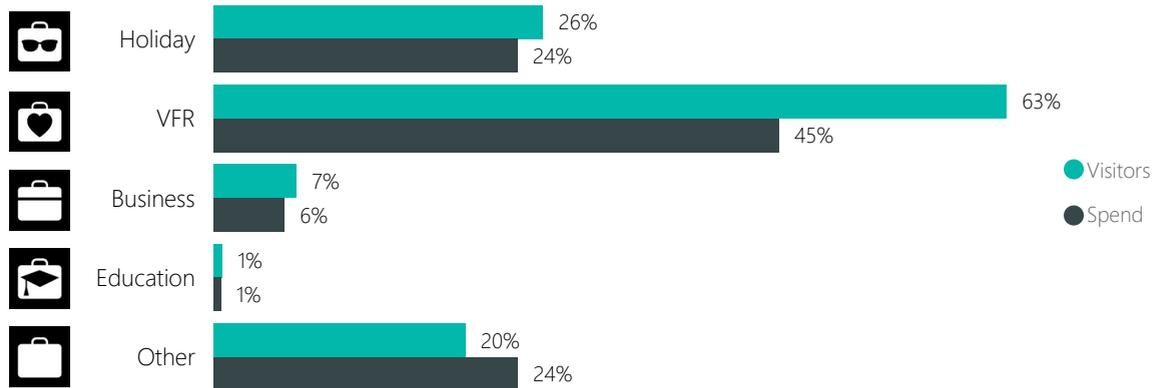
NEW ZEALAND | MARKET PROFILE 2023

MARKET OVERVIEW

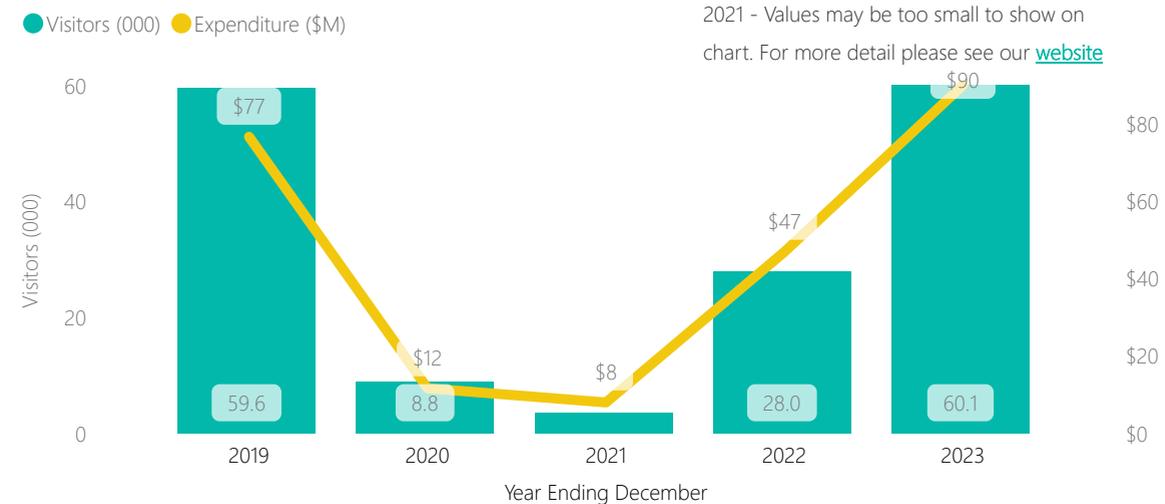
Leisure Visitation to WA¹



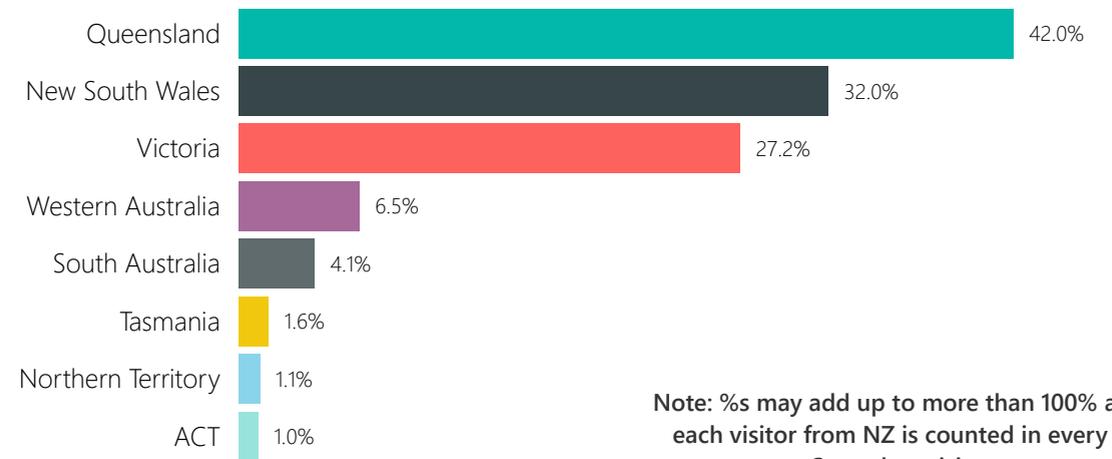
International Visitors and Spend by Purpose (WA)¹



Leisure Visitation and Spend to WA²

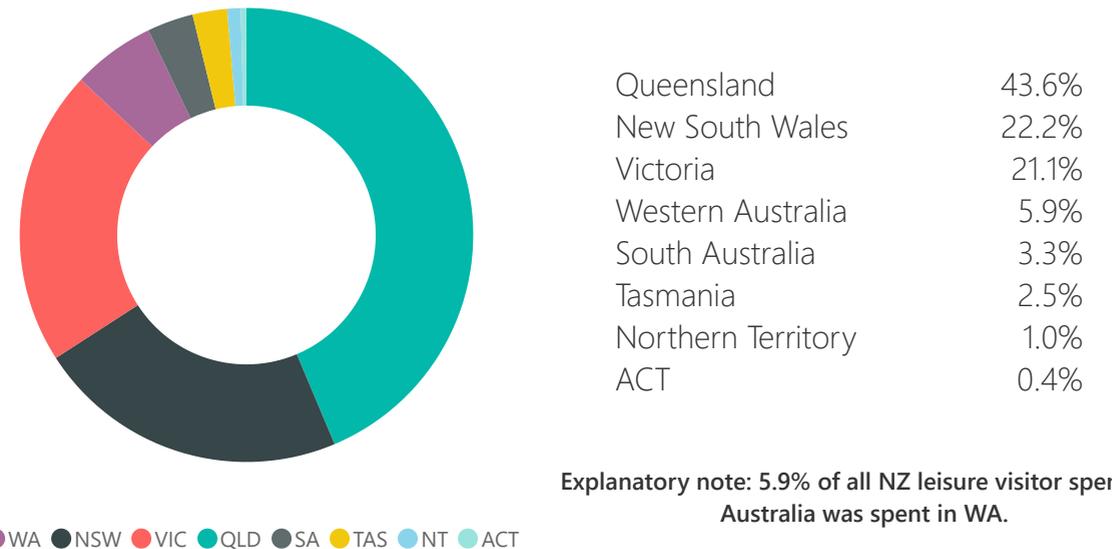


Market Share of International Leisure Visitors to Australia¹



Note: %s may add up to more than 100% as each visitor from NZ is counted in every State they visit.

Market Share of International Leisure Visitor Spend in Australia¹



Explanatory note: 5.9% of all NZ leisure visitor spend in Australia was spent in WA.

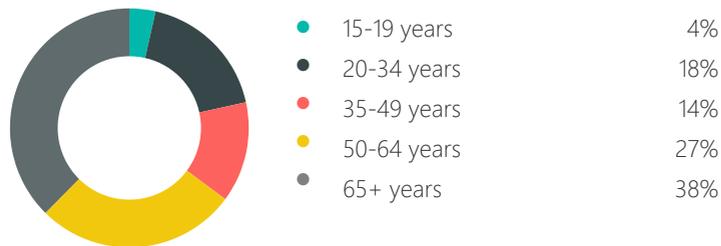
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TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

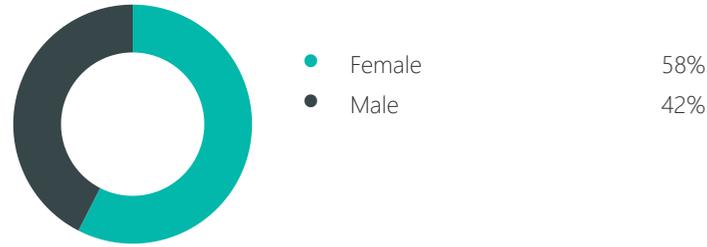
Seasonality - Short-term Leisure Visitor Arrivals to WA⁴



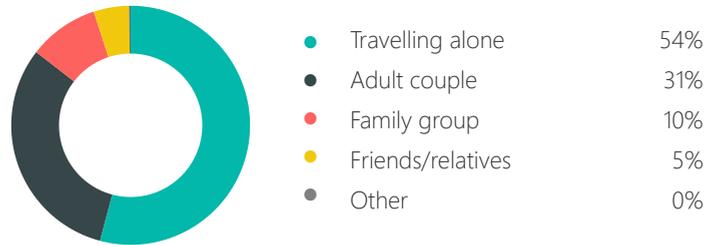
Age³



Gender³



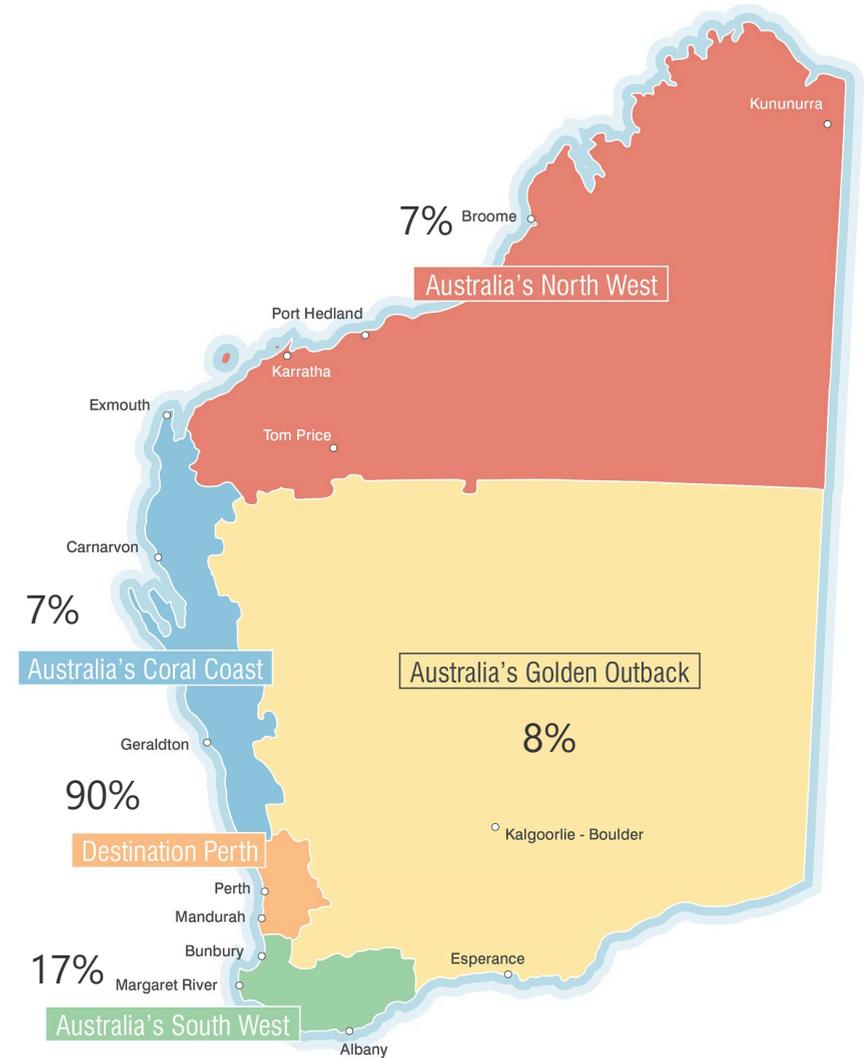
Travel Party³



Length of Trip³



Regional Dispersal³



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TRIP PROFILE (TWO YEAR AVERAGE - 2019/23)

Top 5 Activities for Leisure Visitors to WA³

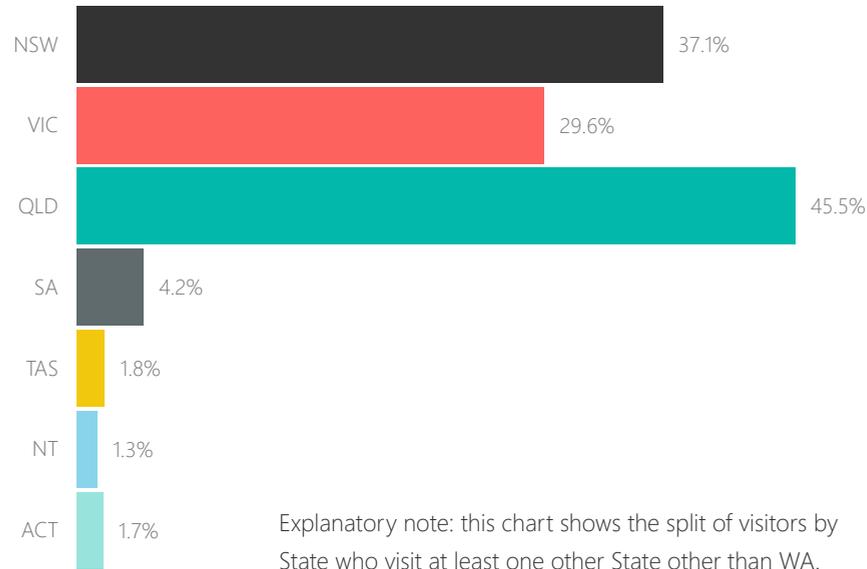
1	Eat out / dine at a restaurant and/or cafe	92%
2	Go shopping for pleasure	77%
3	Go to the beach	65%
4	Pubs, clubs, discos etc	48%
5	Sightseeing/looking around	70%

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	75%
2	Friends or relatives property	72%
3	Hotel/resort/motel or motor Inn	31%

Other States Visited³



Number of States Visited³



Group Tour v Free Independent Travellers (FIT)³

98% 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

14% of NZ leisure visitors to WA arrived on a travel package

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IMPORTANCE FACTORS, DESTINATION CONSIDERATIONS AND ASSOCIATIONS

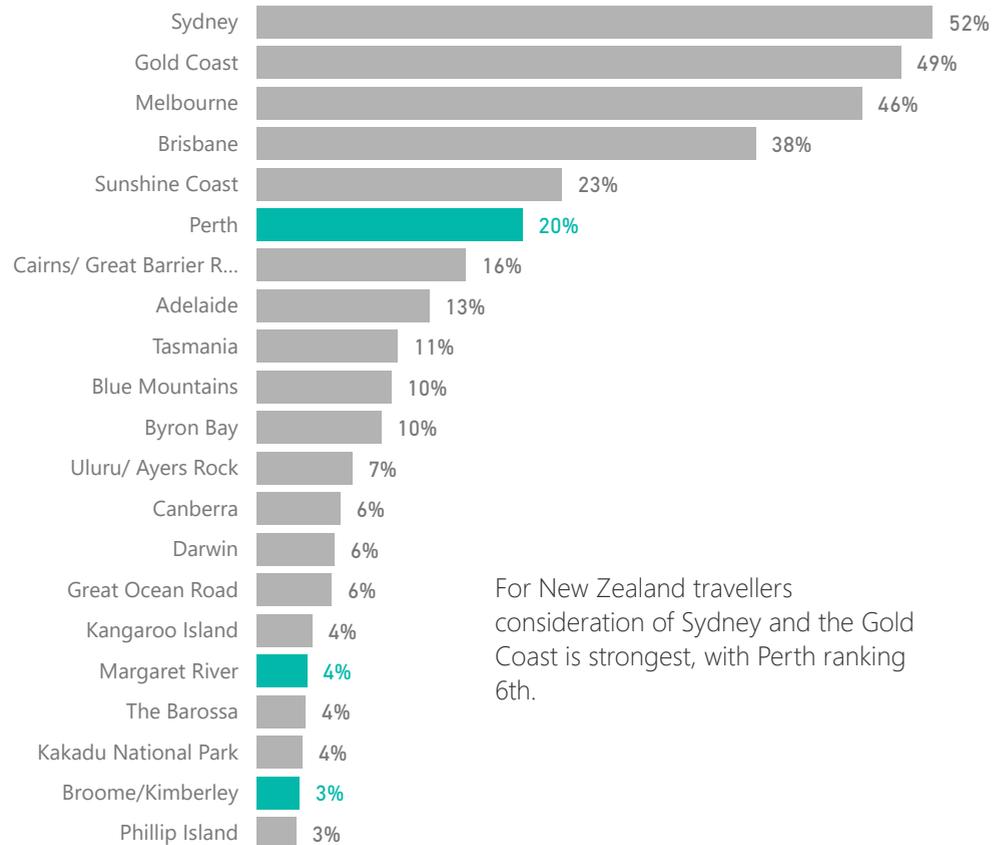
Out of region (OOR) travellers



Travelled outside of their region within the last 5 years for leisure and/or intend to travel outside of their region for leisure within the next 2 years

Consideration of Australian Destinations ⁵

(those considering a trip to Australia in the next 4 years)



For New Zealand travellers consideration of Sydney and the Gold Coast is strongest, with Perth ranking 6th.

Which factors are most important when choosing a destination ⁵

- 1 A safe and secure destination 50%
- 2 Value for money 49%
- 3 Appealing climate or weather 33%
- 4 Good food, wine/beverages, local cuisine and produce 26%
- 5 A family friendly destination 24%
- 6 Beautiful natural environments e.g. mountains, rivers, forests 23%

New Zealand travellers state that they are looking for a safe and secure destination as well as value for money when deciding upon a holiday destination, similar to the global view.

What OOR travellers associate with destinations ⁵

	Sydney	Melbourne	Brisbane	Perth	Margaret River	Broome/Kimberley region
A family friendly destination	38%	39%	36%	22%	7%	6%
A vibrant city lifestyle	67%	61%	37%	22%	2%	3%
Beautiful natural environments	18%	15%	13%	14%	20%	16%
Different and interesting local wildlife	11%	11%	11%	11%	12%	13%
Good food, wine/beverages	43%	48%	28%	19%	11%	5%
Interesting events and festivals	51%	48%	29%	16%	4%	4%
Value for money	24%	26%	22%	12%	4%	3%

New Zealand travellers associate Margaret River most strongly with beautiful natural environments, while Sydney and Melbourne are strongly associated with a vibrant city lifestyle and interesting events/festivals.

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NOTES & REFERENCES

Notes

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

References

1. Tourism Research Australia – International Visitor Survey, YE Dec 23
2. Tourism Research Australia – International Visitor Survey, YE Dec 19/20/21/22/23
3. Tourism Research Australia – International Visitor Survey, 2 yr average, YE Dec 19/23 (2020-2022 cannot be used)
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 23
5. Tourism Australia – Consumer Demand Project, July - December 2023.

Published by Tourism WA, April 2024

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