

This fact sheet provides a summary of the latest tourism data for New Zealand visitors to Victoria. Information includes: visitor numbers, purpose of visit, expenditure, visitor forecasts, regional visitation and dispersal, demographics, visitor behaviour, airline used, travel style, information sources and booking methods.

## I OVERVIEW OF NEW ZEALAND VISITORS TO AUSTRALIA

### I.1 Trends

#### Total New Zealand Visitation to Australia, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
<b>Visitors (000s)</b>	741	970	1,025	1,007	1,005	1,054	3.6%	2.1%	4.8%
<b>Visitor Nights (000s)</b>	11,555	13,713	13,789	14,132	13,471	14,253	2.1%	1.0%	5.8%
<b>Average Length of Stay</b>	15.6	14.1	13.5	14.0	13.4	13.5			

New Zealand generated over one million visitors to Australia in the year ending December 2010. The number of visitors from New Zealand to Australia has increased at a rate of 3.6% per annum over the period 2000-2010. In 2010, New Zealand visitors spent 14.3 million nights in Australia. Visitor nights have grown at a rate of 2.1% per annum between 2000 and 2010. The average length of stay in Australia by New Zealand visitors was 13.5 nights in 2010.

### I.2 Main Purpose of Trip

#### New Zealand Visitors (000s) to Australia by Purpose of Trip, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
<b>Holiday</b>	323	424	444	406	407	424	2.8%	0.0%	4.3%
<b>Visiting friends &amp; relatives</b>	217	259	279	291	319	324	4.1%	5.8%	1.5%
<b>Business</b>	148	210	218	223	194	212	3.6%	0.2%	9.3%
<b>Education</b>	6	14	17	16	14	17	10.3%	4.8%	17.5%
<b>Employment</b>	15	32	34	35	33	35	8.7%	2.4%	6.1%
<b>Other</b>	31	31	33	36	39	42	2.9%	7.5%	8.7%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, 424,000 visitors came to Australia from New Zealand for holiday purposes, representing an increase of 4.3% from the previous year and no change since 2006. 324,000 New Zealand visitors came to Australia to visit friends and relatives (VFR), an increase of 1.5% from the previous year. All other sectors experienced increases in the short term with business up 9.3% year-on-year (212,000 visitors), education up 17.5% (17,000 visitors), and employment up 6.1% with 35,000 visitors in 2010.

# International Market Profile

## New Zealand

Year Ending December 2010

### 1.3 States/Territories Visited

#### New Zealand Overnight Visitation (000s) to Australia by State/Territory, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
<b>Australia</b>	741	970	1,025	1,007	1,005	1,054	3.6%	2.1%	4.8%
New South Wales	325	359	381	360	357	392	1.9%	2.2%	9.8%
<b>Victoria</b>	<b>169</b>	<b>229</b>	<b>242</b>	<b>228</b>	<b>231</b>	<b>246</b>	<b>3.9%</b>	<b>1.9%</b>	<b>6.8%</b>
Queensland	269	404	434	409	398	404	4.1%	0.0%	1.6%
South Australia	28	33	40	39	37	36	2.6%	2.1%	-4.6%
Western Australia	42	49	52	65	64	59	3.5%	5.0%	-8.0%
Tasmania	10	11	17	14	13	15	4.1%	6.9%	11.0%
Northern Territory	8	14	11	15	18	15	6.3%	2.1%	-17.1%
ACT	10	13	15	14	14	14	3.2%	1.9%	0.0%

There were 246,000 New Zealand overnight visitors to Victoria in 2010, a 6.8% increase over the previous year. Nationally, New Zealand visitation to Australia increased by 4.8% from 2009 to 2010. New Zealand visitation to Victoria has grown at an annual average rate of 1.9% between 2006 and 2010, outperforming the growth rate of key competitor Queensland (no change) and just slightly below that of the national rate (+2.1%) and that of New South Wales (+2.2%).

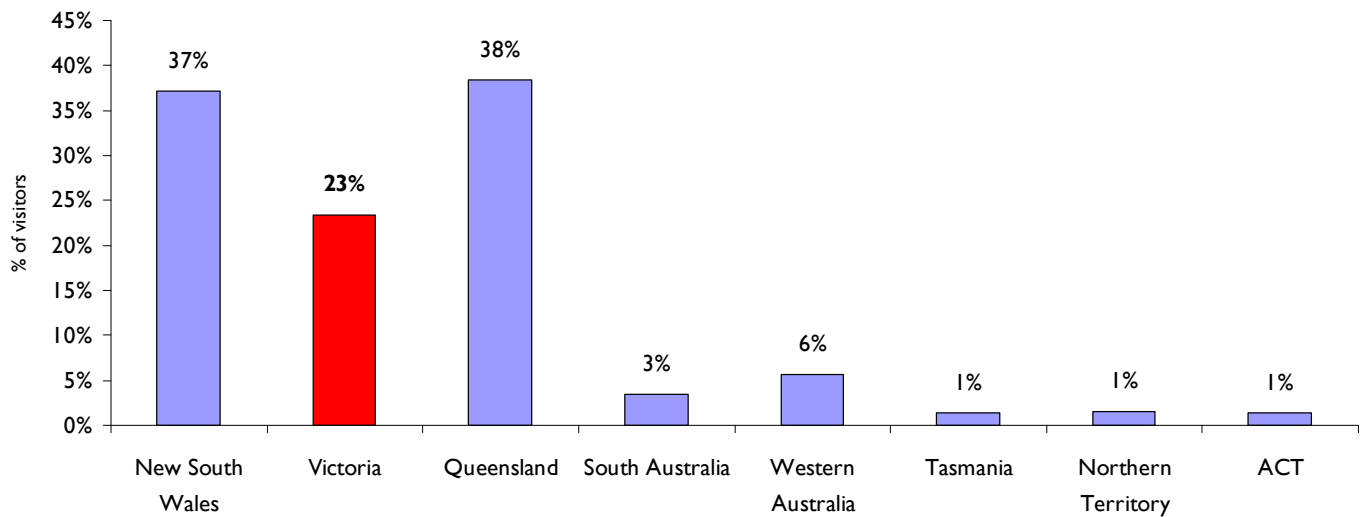
#### New Zealand Visitor Nights (000s) in Australia by State/Territory, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
<b>Australia</b>	<b>11,555</b>	<b>13,713</b>	<b>13,789</b>	<b>14,132</b>	<b>13,471</b>	<b>14,253</b>	2.1%	1.0%	5.8%
New South Wales	4,378	4,158	3,920	3,299	3,609	4,182	-0.5%	0.1%	15.9%
<b>Victoria</b>	<b>1,966</b>	<b>2,267</b>	<b>2,434</b>	<b>2,339</b>	<b>2,097</b>	<b>2,220</b>	<b>1.2%</b>	<b>-0.5%</b>	<b>5.9%</b>
Queensland	3,838	4,974	5,249	5,593	5,167	5,164	3.0%	0.9%	-0.1%
Western Australia	592	1,229	1,206	1,802	1,641	1,592	10.4%	6.7%	-3.0%
Other States & Territories	749	1,063	954	1,058	903	1,060	3.5%	-0.1%	17.4%

In 2010 the number of visitor nights spent in Victoria by New Zealand visitors increased by 5.9% from the previous year to 2.2 million visitor nights. New South Wales experienced a strong increase of 15.9% year on year to 4.2 million visitor nights while Queensland experienced a small decline of 0.1%.

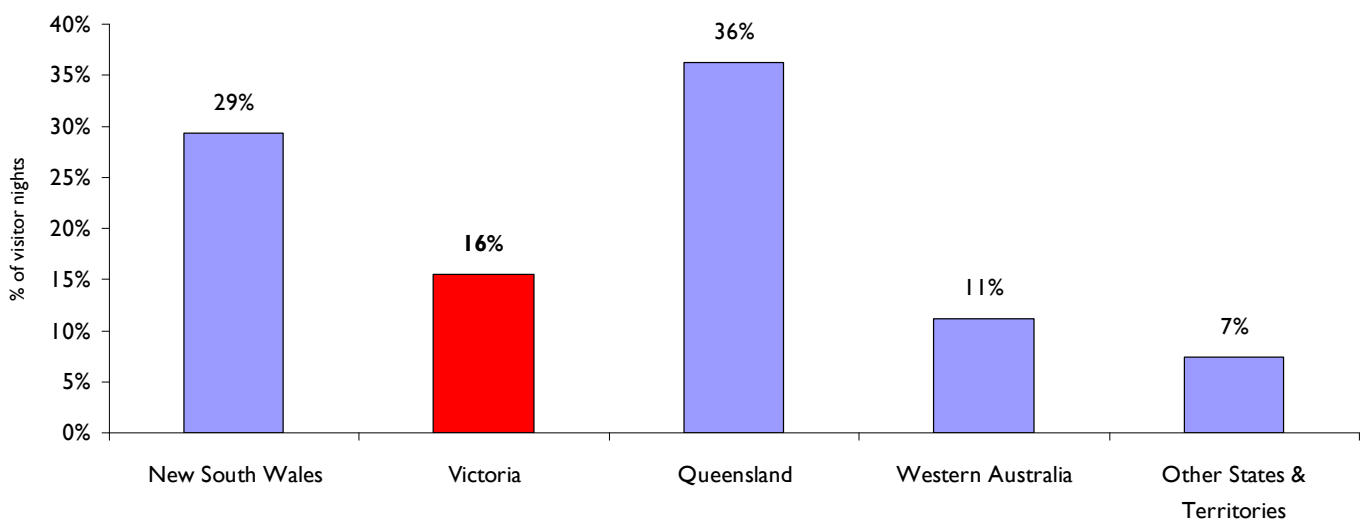
#### 1.4 Visitor/ Nights Share by State

##### New Zealand Overnight Visitors<sup>1</sup> to Australia, Year ending December 2010 – by State



23% of New Zealand visitors to Australia in 2010 stayed overnight in Victoria, compared to 38% in Queensland and 37% in New South Wales.

##### New Zealand Visitor Nights to Australia, Year ending December 2010 – Market Share by State



Victoria's market share of visitor nights spent by New Zealand travellers in 2010 was 16%, 20 percentage points behind Queensland (36%) and 13 percentage points behind New South Wales (29%).

<sup>1</sup> NOTE: The proportion of Visitors to the States and Territories will not add up to 100% as visitors can travel to multiple destinations in one trip; while the proportion of Visitor Nights to the States and Territories will add to 100% as this measure is mutually exclusive.

### 1.5 Main Purpose of Visit – Visitors to Victoria

#### New Zealand Visitation (000s) to Victoria by Main Purpose of Visit, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	
							2000-2010	2006-2010	09-10
<b>Holiday</b>	70	89	95	88	82	90	2.5%	0.3%	9.5%
<b>Visiting friends &amp; relatives</b>	48	60	65	64	75	75	4.6%	6.0%	1.0%
<b>Total Leisure</b>	118	148	160	152	157	165	3.4%	2.7%	5.4%
<b>Business</b>	41	60	63	59	57	63	4.5%	1.1%	11.0%
<b>Education</b>	-	-	6	-	-	5	-	-	-
<b>Employment</b>	-	10	7	6	5	6	-	-13.4%	7.1%
<b>Other</b>	-	7	6	7	8	7	-	0.9%	-11.8%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, there were 165,000 New Zealand overnight leisure visitors to Victoria, a 5.4% increase over the previous year and 2.7% average annual increase from 2006 to 2010, mainly due to an increase in overnight holiday visitors (up 9.5% year-on-year). Victoria also experienced a year-on-year increase in overnight business (+11.0%) visitors from New Zealand.

### 1.6 Regional Dispersal<sup>2</sup> – Visitor Nights (000s), 2 years (rolling) ending 2000 - 2010

New Zealand	2000	2 Years Ending December					2010	Ave. Annual	Ave. Annual	% change
		2006	2007	2008	2009	Change (%)		Change (%)		
							2000-2010	2006-2010	2009-2010	
<b>Regional Victoria - Nights (000s)</b>	-	849	815	1,029	1,115	892	-	1.2%	-20.0%	
<b>% of total nights in State</b>	-	17%	17%	22%	25%	21%				
Regional NSW - Nights (000s)	1,377	1,730	1,701	1,590	1,505	2,027	3.9%	4.0%	34.6%	
<b>% of total nights in State</b>	19%	21%	21%	22%	22%	26%				
Regional Qld - Nights (000s)	2,567	4,197	3,850	3,563	3,370	3,629	3.5%	-3.6%	7.7%	
<b>% of total nights in State</b>	35%	41%	38%	33%	31%	35%				
Regional Australia - Visitor Nights (000s)	5,266	8,615	8,288	8,371	8,286	8,844	5.3%	0.7%	6.7%	
<b>% of total nights in Aust</b>	25.1%	30.6%	30.1%	30.0%	30.0%	31.9%				

NB: where there is a '-', figures are unreliable and are unable to be published.

New Zealand visitors spent 892,000 nights in regional Victoria in the period two years ending December 2010, a decrease of 20.0% from the previous period, but an increase over the medium term, 1.2% average annual increase from 2006. Nights in regional Australia experienced good growth year-on-year with an increase of 6.7% to 8.8 million nights in the recent period, driven by a 34.6% increase for nights in regional New South Wales.

<sup>2</sup> "Regional" is defined as non capital city nights for each state with the exception of the Gold Coast. For example, Regional Queensland excludes nights spent in both Brisbane and the Gold Coast.

### I.7 Melbourne and Victorian Regions Visited

#### New Zealand Visitation (000s) to Victoria, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change 2000-2010	% change 2006-2010	2009-2010
Daylesford & Macedon Ranges	-	-	-	5	5	-	-	-	-
Gippsland	15	12	12	12	13	13	-1.8%	1.0%	-5.1%
Goldfields	12	13	14	15	14	13	0.9%	0.0%	-11.8%
Grampians	6	8	8	9	8	5	-1.7%	-10.1%	-31.6%
Great Ocean Road	21	28	35	39	32	34	5.1%	5.0%	5.3%
<b>Melbourne</b>	<b>292</b>	<b>420</b>	<b>436</b>	<b>427</b>	<b>408</b>	<b>430</b>	<b>3.9%</b>	<b>0.6%</b>	<b>5.5%</b>
Mornington Peninsula	6	13	11	16	15	16	11.0%	4.9%	7.4%
Murray	13	15	17	19	18	13	-0.1%	-4.1%	-27.4%
Phillip Island	-	5	5	-	6	6	-	4.3%	6.8%
Victoria's High Country	5	9	6	-	6	6	1.0%	-8.2%	0.5%
Yarra Valley & Dandenong Ranges	-	9	11	13	14	12	-	7.2%	-14.4%
<b>Regional Victoria</b>	<b>60</b>	<b>88</b>	<b>96</b>	<b>109</b>	<b>107</b>	<b>100</b>	<b>5.2%</b>	<b>3.3%</b>	<b>-6.6%</b>

NB: Where there is a '-', figures are unreliable and are unable to be published.

There were 430,000 New Zealand overnight visitors to Melbourne in the two years ending December 2010, a 5.5% increase over the previous period. New Zealand overnight visitation to Melbourne has grown at an annual average rate of 3.9% over the longer term (2000 to 2010). While regional Victoria has experienced a short term decline (-6.6%), there is good longer term growth from the New Zealand market since 2000 (+5.2%).

#### New Zealand Visitor Nights (000s) in Victoria, 2 years (rolling) ending 2000-2010

Campaign Regions	2 Years Ending December						Av Annual	Av Annual	% change
	2000	2006	2007	2008	2009	2010	% change 2000-2010	% change 2006-2010	2009-2010
Melbourne	3,151	4,013	3,886	3,744	3,321	3,425	0.8%	-3.9%	3.1%
Regional Victoria	-	849	815	1,029	1,115	892	-	1.2%	-20.0%

NB: Where there is a '-', figures are unreliable and are unable to be published.

The number of visitor nights spent in Melbourne by New Zealand visitors increased by 3.1% from the previous period to reach 3.4 million visitor nights in the period two years ending December 2010. Visitor nights spent in regional Victoria decreased in the short term (-20.0%).

### 1.8 Visitor Expenditure

Expenditure by New Zealand Visitors	Total Expenditure					Expenditure Share			Expenditure Per Night			Expenditure Per Visitor		
	Nominal (\$ million)			Av Ann	% Change	%			\$			\$		
	2000	2009	2010	% Change	00-10	09-10	2000	2009	2010	2000	2009	2010	2000	2009
New South Wales	362	356	410	1.3%	15.2%	8.5%	5.8%	6.5%	83	99	98	1,114	997	1,046
<b>Victoria</b>	<b>176</b>	<b>271</b>	<b>326</b>	<b>6.4%</b>	<b>20.3%</b>	<b>10.5%</b>	<b>7.2%</b>	<b>8.3%</b>	<b>90</b>	<b>129</b>	<b>147</b>	<b>1,044</b>	<b>1,175</b>	<b>1,323</b>
Queensland	273	531	526	6.8%	-0.9%	9.0%	13.7%	13.9%	71	103	102	1,014	1,335	1,301
South Australia	np	45	41	np	-8.9%	np	6.8%	5.6%	np	117	113	np	1,206	1,151
Western Australia	41	111	102	9.5%	-8.1%	3.7%	6.3%	5.3%	69	68	64	985	1,734	1,732
Tasmania	np	17	31	np	82.4%	np	6.2%	11.1%	np	136	137	np	1,282	2,108
Northern Territory	np	23	24	np	4.3%	np	5.1%	6.5%	np	72	76	np	1,249	1,572
Australian Capital Territory	np	6	12	np	100.0%	np	2.6%	4.2%	np	84	77	np	432	864
<b>Australia</b>	<b>905</b>	<b>1,360</b>	<b>1,471</b>	<b>5.0%</b>	<b>8.2%</b>	<b>8.1%</b>	<b>7.9%</b>	<b>8.4%</b>	<b>79</b>	<b>101</b>	<b>103</b>	<b>1,221</b>	<b>1,353</b>	<b>1,396</b>

NB: Visitor expenditure includes expenditure on packages attributable to destination.

Source: Tourism Research Australia expenditure allocation method applied to 2000-2010 International Visitor Survey data.

Since 2000, expenditure by New Zealand visitors in Australia has increased at an annual average rate of 5.0% to reach \$1.5 billion in 2010. New Zealand visitor expenditure in Victoria reached \$326 million in 2010 with a year-on-year increase of 20.3%, representing an 8.3% share of total international expenditure in Victoria. In 2010, Victoria achieved the highest expenditure per night result (\$147p/nt) of all states and territories.

### 1.9 Visitor Forecasts

NZ Forecasts	2010		FORECAST										Ave Annual Growth Rate (2009 - 2020)
	Vic Mkt Share	ACTUAL 2010	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020	
Visitor Numbers (000s)	23%	246	244	250	256	262	267	272	278	283	288	294	2.2% p.a.
Visitor Nights (000s)	16%	2,220	2,144	2,207	2,269	2,326	2,385	2,446	2,503	2,564	2,623	2,682	2.3% p.a.

Note 1: Based on visitors aged 15 years or over.

Note 2: Slight variations in calculations are due to rounding.

Sources: Tourism Forecasting Committee Forecast November 2010 Issue 2; International Visitor Survey, Tourism Research Australia, year ending December 2010

Average annual growth for arrivals to Australia from New Zealand is forecast at 2.2% over the period 2009-2020. Victoria is estimated to receive 294,000 overnight visitors from New Zealand by 2020. The outlook for future growth remains positive for this mature market to Australia, with the expectation of continued strong airfare competition and a broadening range of direct destination options ie. direct flights to ports such as Adelaide, Cairns and Perth. Forecast figures were released prior to the earthquake in Christchurch in February 2011.

Source: Tourism Forecasting Committee Forecast 2010 Issue 1, June 2010.

For more detailed information on tourism forecasting, market performance and economic commentary, please refer to the source at:

<http://www.ret.gov.au/tourism/tra/traforecasts/publications/Pages/default.aspx>

## 2 OVERVIEW OF NEW ZEALAND LEISURE VISITORS TO VICTORIA

The main focus of this analysis will be on leisure travellers from New Zealand to Victoria. Leisure travellers are those who travelled to Australia for holiday purposes or to visit friends and relatives (VFR).

### New Zealand Visitation to Victoria for Leisure, 2000-2010

Year Ending December	2000	2006	2007	2008	2009	2010	Av Annual	Av Annual	% change
							% change	% Change	% change
							2000-2010	2006-2010	09-10
<b>Visitors (000s)</b>	118	148	160	152	157	165	3.4%	2.7%	5.4%
% Market Share	22%	22%	22%	22%	22%	22%			
<b>Visitor Nights (000s)</b>	1,156	1,325	1,351	1,293	1,321	1,311	1.3%	-0.3%	-0.7%
% Market Share	14%	15%	15%	14%	15%	14%			
<b>Average Length of Stay</b>	9.8	8.9	8.4	8.5	8.4	7.9			

In 2010, there were 165,000 New Zealand leisure visitors who stayed in Victoria, a 5.4% increase over the previous year and 2.7% average annual increase over the period 2006 to 2010. While visitors increased, visitor nights and hence length of stay decreased. This segment spent 1.3 million visitor nights in Victoria in 2010, a 0.7% decrease from the previous year. Average length of stay decreased to 7.9 nights.

### New Zealand 'Experience Seekers' – Proportion by State/ Territory, 2007-2010

Tourism Australia defines the Experience Seekers as "looking for unique, involving and personal experiences from their holidays. Experience Seekers are long haul travellers who are less affected by the traditional barriers to travel of distance, time and cost. They are more informed, interested and curious about potential travel destinations. Experience Seekers can be found among all age groups, income levels and geographic locations."

Year ending December	2007	2008	2009	2010
<b>Total</b>	45%	49%	52%	52%
New South Wales	47%	47%	51%	52%
<b>Victoria</b>	48%	53%	55%	52%
Queensland	42%	47%	50%	51%
South Australia	53%	54%	54%	49%
Western Australia	47%	52%	53%	50%
Tasmania	54%	62%	53%	52%
Northern Territory	50%	53%	65%	52%
Australian Capital Territory	56%	35%	50%	55%

Of New Zealand overnight leisure visitors to Victoria, 52% can be defined as part of the Tourism Australia defined segment "Experience Seekers" in 2010. This is similar to the proportion of New Zealand leisure travellers to Australia generally (52%), and also for key competitors New South Wales (52%) and Queensland (51%). Over time, this proportion has increased 4 percentage points, from 48% of overnight leisure visitors to Victoria in 2006.

For more detailed information on the Experience Seekers segment, please refer to:

<http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>

## 2.1 Places Visited in Regional Victoria and Melbourne Attractions

Selected Places Visited - Overnight Visit or Daytrip (% of all Leisure Overnight Visitors to Victoria)	New Zealand All International		Selected Places Visited - Melbourne Attractions (% of Leisure Overnight Visitors to Victoria)	New Zealand All International	
	Visitors	Visitors		Visitors	Visitors
Phillip Island, penguin parade	5%	20%	Crown Casino/entertainment complex	25%	33%
Ballarat, Sovereign Hill	7%	12%	Federation Square	48%	50%
Dandenongs, Puffing Billy, Healesville Sanctuary	9%	14%	Queen Victoria Market	42%	51%
Great Ocean Road or Twelve Apostles	10%	34%	Southbank/Southgate	38%	31%
Mornington Peninsula	9%	9%	Melbourne Museum (Royal Exhibition Building)	17%	23%
Daylesford, Hepburn Springs, Macedon	-	2%	Docklands/Telstra Dome	32%	28%
Yarra Valley	6%	12%	National Gallery of Victoria (NGV)	13%	17%
Bendigo	4%	5%	Melbourne Cricket Ground (MCG)	9%	11%

Of the Victorian places visited (for an overnight visit or daytrip) 10% of New Zealand overnight leisure visitors to Victoria spent time in the Great Ocean Road region and/or the Twelve Apostles. This region is very popular generally with 34% of all international overnight leisure visitors travelling there.

Of the Melbourne attractions visited 48% of New Zealand overnight leisure visitors to Victoria spent time at Federation Square, compared to 50% of all international overnight leisure visitors to Victoria. The highest result for all the listed Melbourne Attractions for international overnight leisure visitors generally was the Queen Victoria Markets (51% of overnight leisure visitors to Victoria).

## 2.2 New Zealand Region of Origin

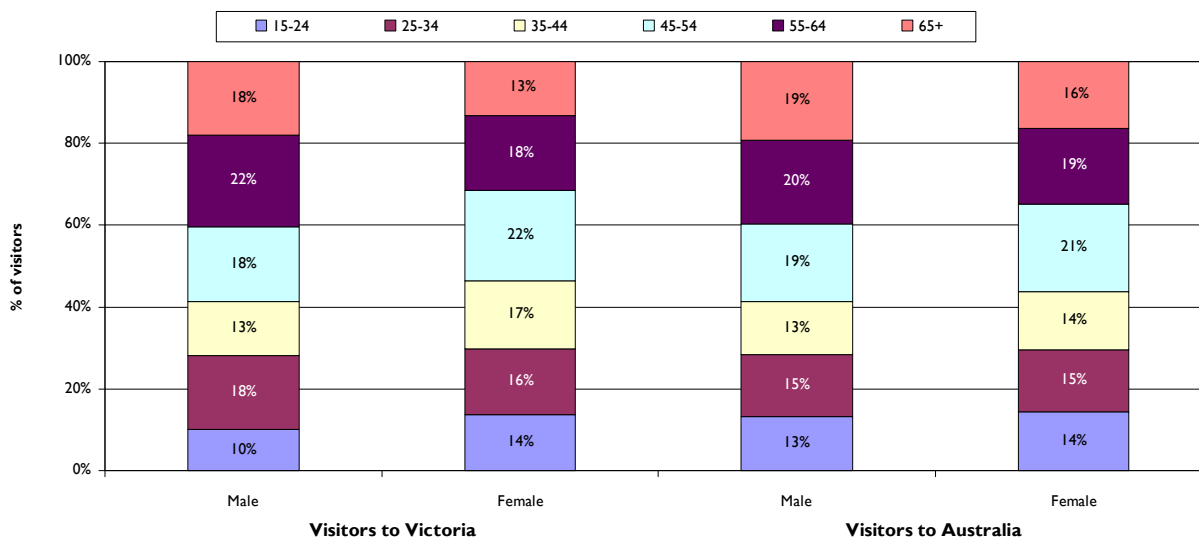
New Zealand Regions	Visitors to Victoria	Visitors to Australia	Visitors to New South Wales	Visitors to Queensland
Auckland	42%	38%	42%	34%
Canterbury	16%	15%	13%	17%
Waikato	9%	7%	7%	7%
Bay of Plenty	8%	9%	8%	9%
Wellington	7%	9%	9%	8%
Otago	5%	5%	4%	5%
Manawatu-Wanganui	-	3%	3%	4%
Nelson	-	2%	2%	2%
Hawke's Bay	-	3%	3%	4%

NB: Where there is a '-', figures are unreliable and are unable to be published.

In 2010, 42% of New Zealand overnight leisure visitors to Victoria live in Auckland (as their usual place of residence), followed by Canterbury (16%), Waikato (9%) and the Bay of Plenty (8% of visitors).

## 2.3 Demographic Profiling

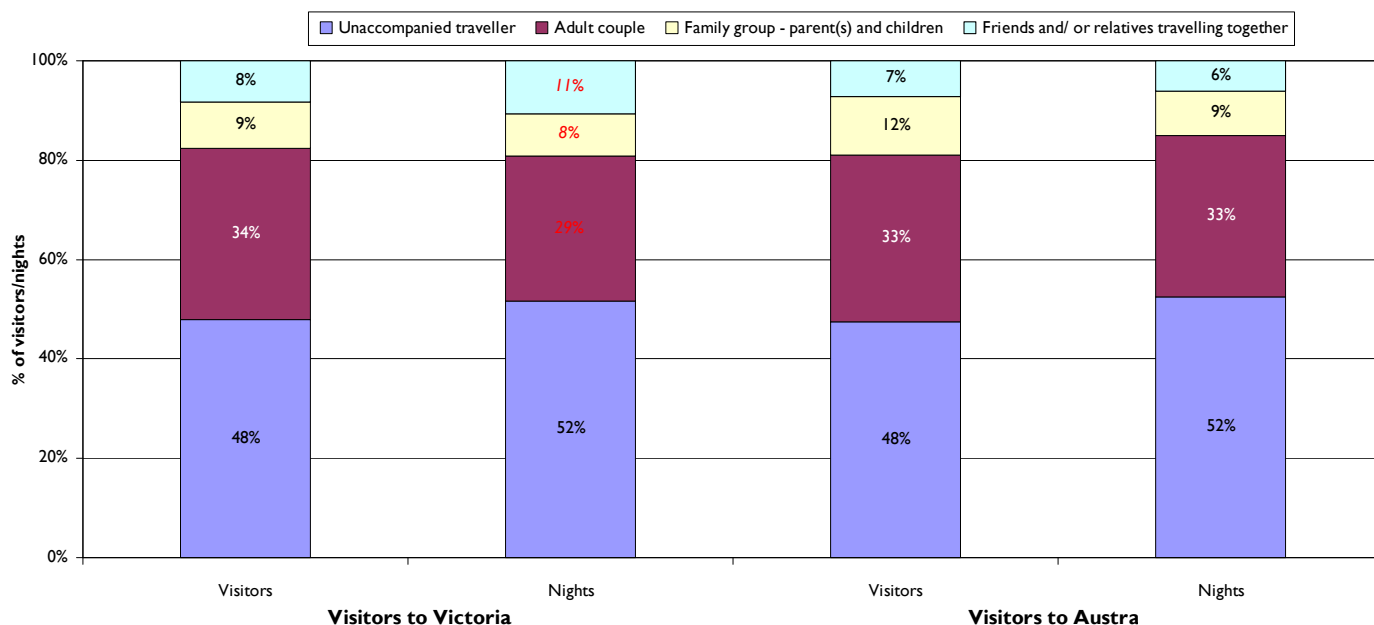
### Age Group & Gender (% of overnight leisure visitors from New Zealand)



New Zealand overnight leisure visitors to Victoria comprised of 43% males and 57% females in 2010. These visitors were evenly spread across the age brackets with the highest proportion from the 55 to 64 age group for males (22%) and 45 to 54 age group for females (22%). New Zealand leisure visitors to Australia had a similar pattern with 19% of males and 21% of females aged between 45 and 54 years and 20% of males and 19% of females between 55 and 64 years.

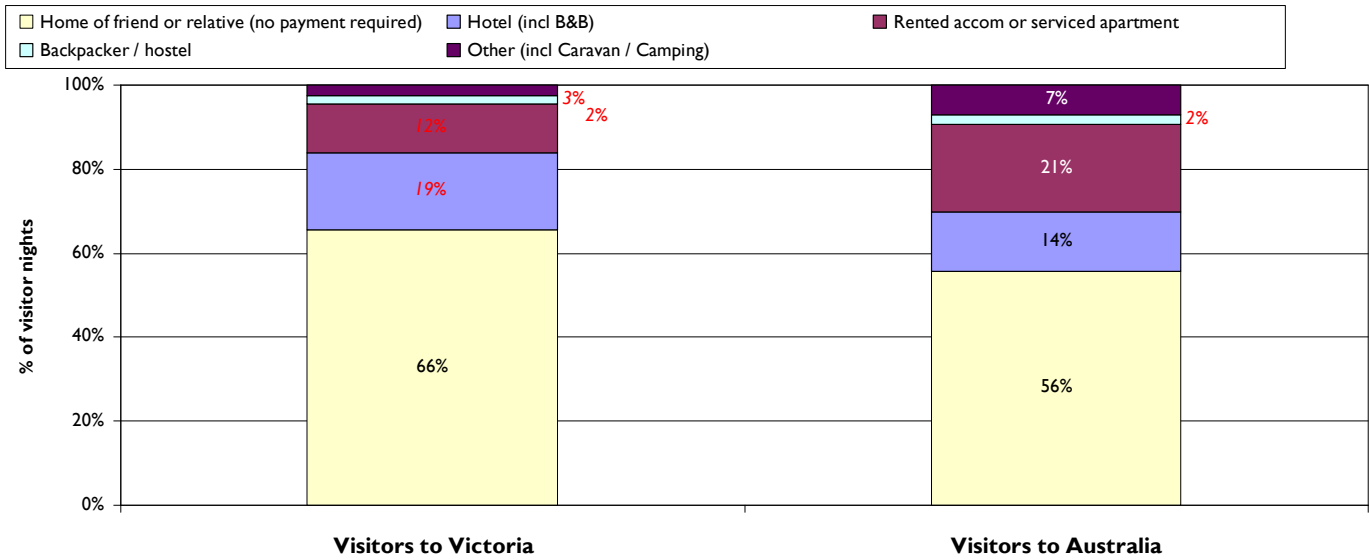
## 2.4 Detailed Visitor Behaviour

### Travel Party Description (% of overnight leisure visitors from New Zealand)



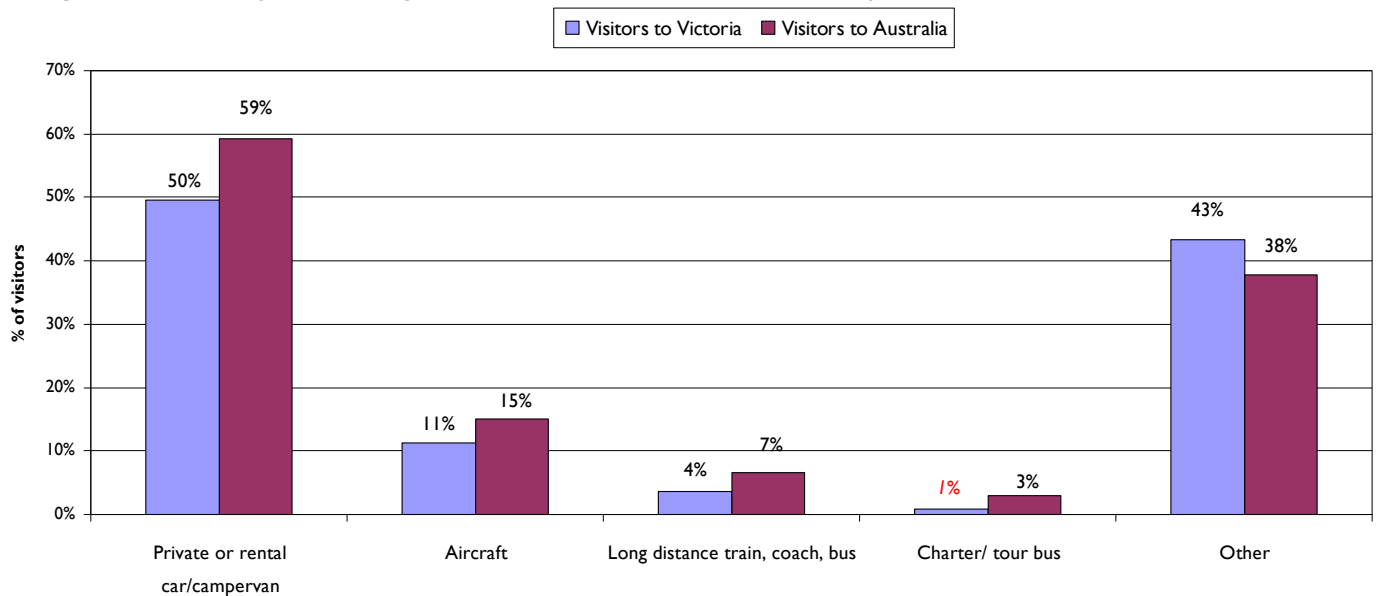
The majority of overnight leisure visitors to Victoria from New Zealand in 2010 travelled either alone (48%) or in an adult couple (34%). Solo travellers spent more nights in Victoria than adult couples with 52% of visitor nights in Victoria spent by unaccompanied travellers (compared to 29% of nights spent by adult couples). These results were reasonably consistent with the national trend as illustrated in the chart above.

**Accommodation (% of visitor nights spent by New Zealand leisure visitors)**



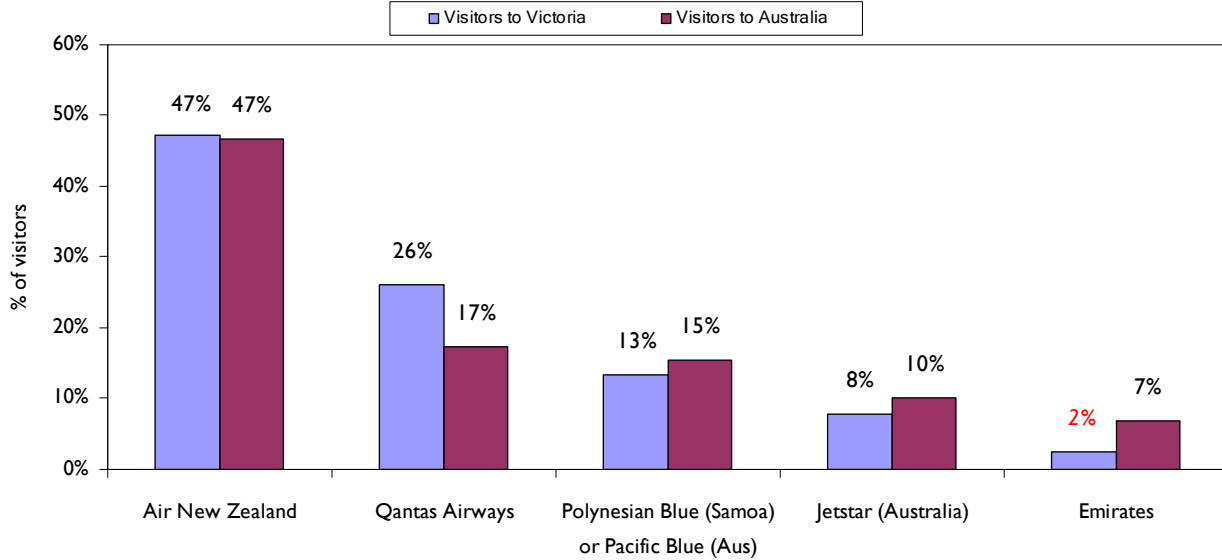
In 2010, 66% of nights spent by leisure visitors to Victoria from New Zealand were with friends or relatives. New Zealand leisure visitors to Australia spent 56% of visitor nights with friends or relatives, 21% were spent in rented accommodation or serviced apartments, 14% in hotels or B&Bs, and 7% at other accommodations (excluding backpacker/hostel).

**Transportation used (% of overnight leisure visitors from New Zealand)**



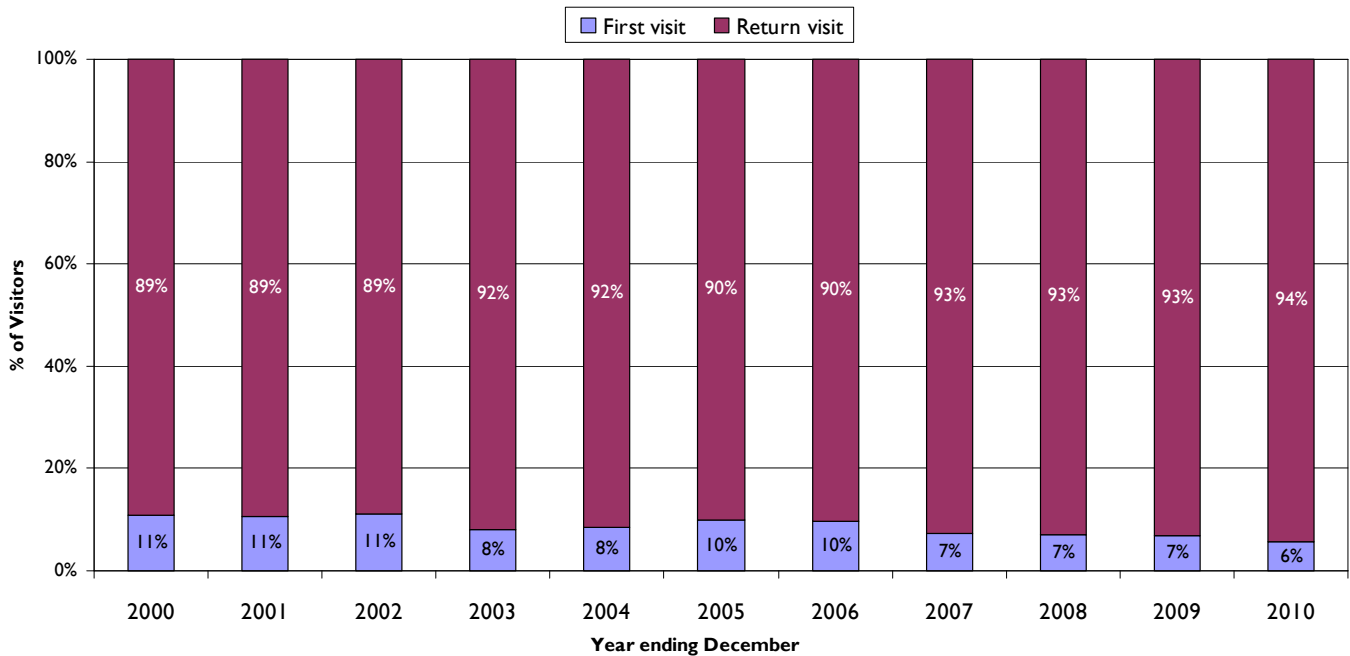
Of the 165,000 New Zealand leisure visitors who stayed overnight in Victoria in 2010, 50% used a private or rental car, campervan or a motor-home on their trip.

**Departure Airline used (% of overnight leisure visitors from New Zealand)**



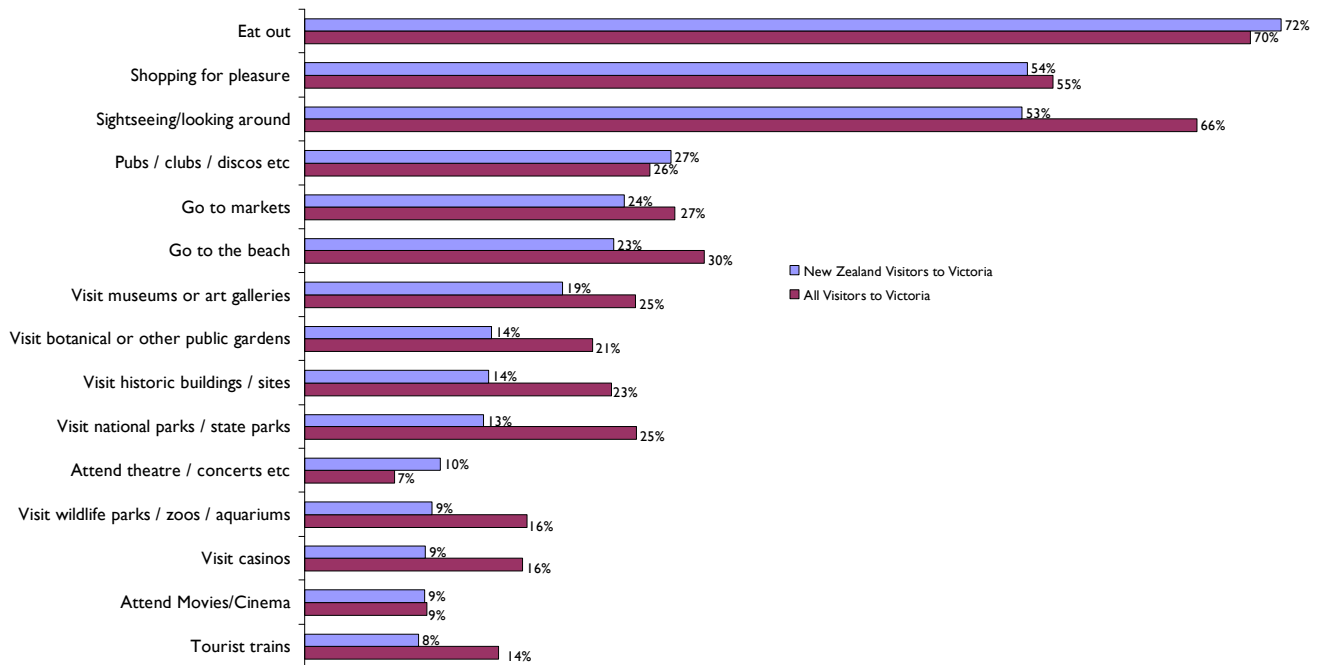
Among New Zealand leisure visitors to Australia in 2010, the leading airline used for departure was Air New Zealand (47%). For overnight leisure visitors to Victoria, Air New Zealand was also the most popular (47%), however they were more likely than visitors to Australia generally from New Zealand to use Qantas (26% compared to 17%).

**Repeat Visitation to Victoria (% of overnight leisure visitors from New Zealand)**



The New Zealand leisure travel market is Australia's most mature. In 2010 the proportion of overnight leisure visitors from New Zealand who visited Victoria for the first time was 6%, a decrease from 2000 (11%). This has led to an increase in repeat leisure visitors from New Zealand to Victoria – in 2000 repeat visitors made up 89% of all New Zealand visitors and increased to 94% in 2010. In 2010 the same proportion of New Zealand leisure visitors to Australia were repeat visitors (94%).

### Top 15 Activities (% of overnight leisure visitors from New Zealand)



Note: New Zealand visitor activities are based on three years to December 2010.

New Zealand leisure visitors who stayed overnight in Victoria enjoyed a mix of indoor and outdoor activities on their trips.

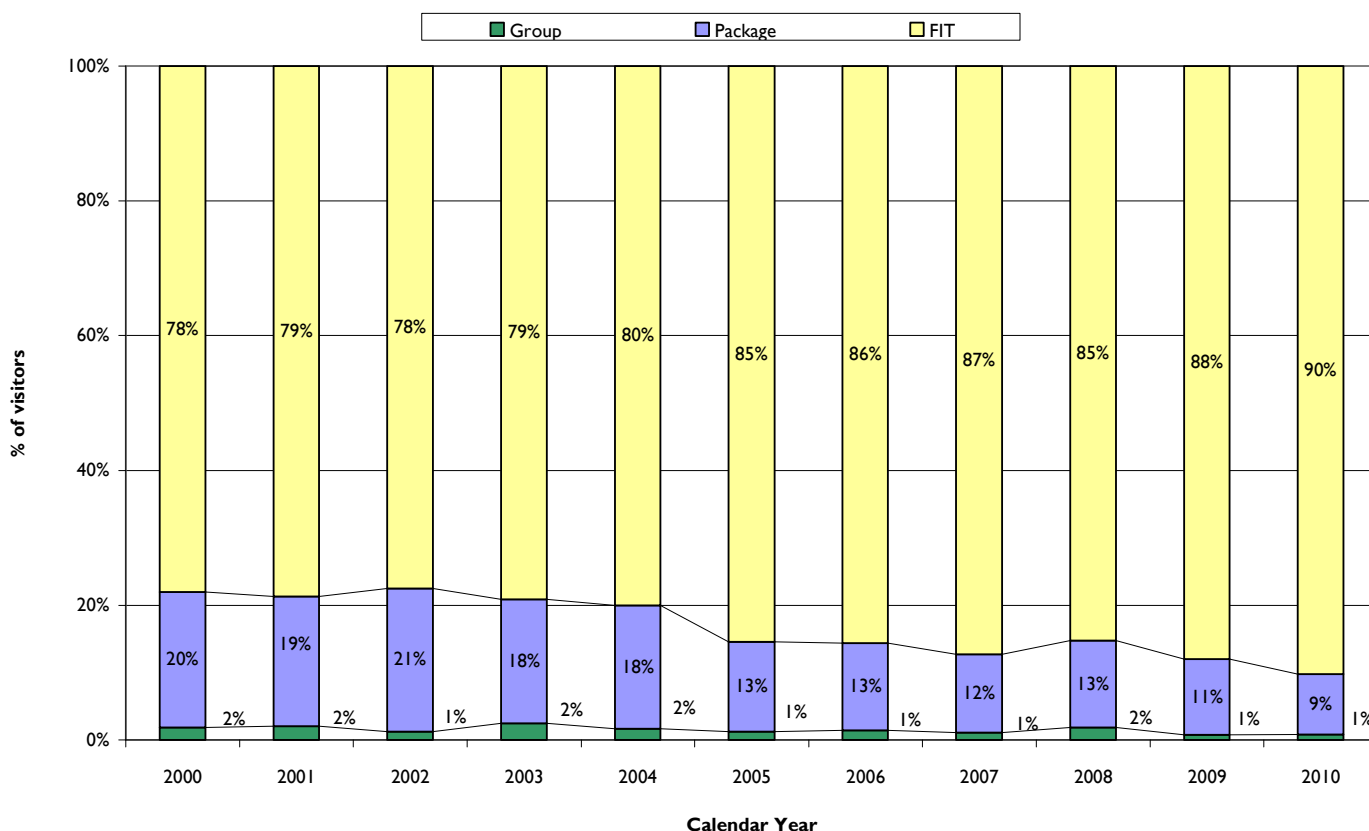
Of the most common activities on their trip as listed above, they are slightly more likely to attend theatre or concerts (10% compared to 7%), to enjoy dining out (72% compared to 70%) and going to pubs, clubs and discos (27% compared to 26%).

Unlike some markets, New Zealand leisure visitors do not display a greater likelihood to do a number of particular activities than the average international overnight leisure visitor to Victoria. There are many possible reasons that this is the case including the high repeat visitation of the market and their familiarity with Australia and Victoria, or the varied interests of the market generally when they travel.

### 3 TRAVEL STYLE

#### 3.1 Group, package & Fully Independent Travel (FIT)\* travel

##### Trends in Group, Package and FIT travel among New Zealand leisure visitors to Australia, 2000-2010



Since 2000 the FIT segment has continued to account for approximately 78% to 90% of New Zealand leisure visitors to Australia, reflecting the maturity of the market. In 2010 the FIT segment accounted for 90% of leisure visitors, the highest result for the decade. Trends suggest a decrease in the utilisation of packaged offers with only 9% of visitors in 2010 travelling on a package (compared to 20% in 2000).

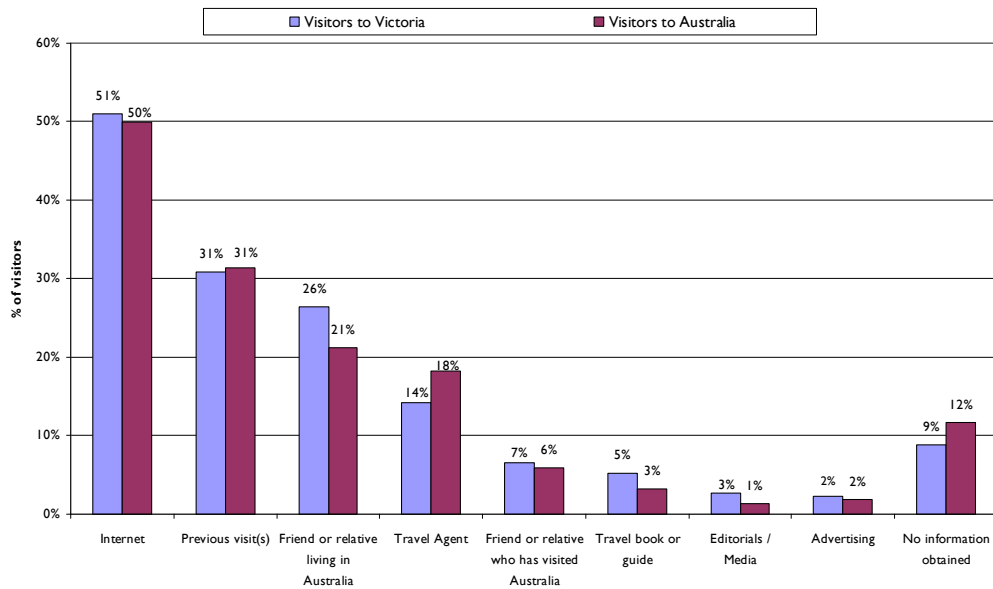
\* NOTE: Group, Package and FIT are derived using the following method.

'Group' travellers refer to those who responded yes to question "Did you travel to Australia on a group tour?". 'Package' travellers refer to those who responded yes to question "Did you arrive in Australia on a travel package?" (minus 'Group' travellers). The remaining travellers who were not 'group' or 'package' are referred to as 'FIT' travellers.

## 4 INFORMATION SOURCES & BOOKING METHODS

### 4.1 Information Sources

#### Information Sources by New Zealand Leisure Visitors to Australia and Victoria, 2010

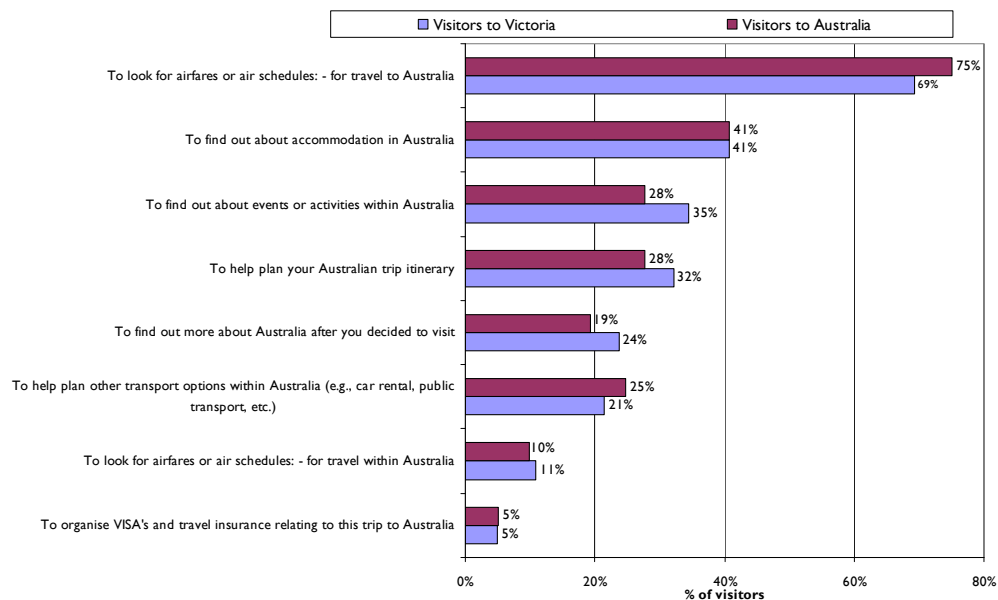


Base: Valid responses

NB: Information Sources with a value below 2% have been omitted.

Among New Zealand overnight leisure visitors to Victoria in 2010 the leading information source used was the internet (51%) followed by previous visits (31%) and word of mouth from an Australian resident (26%).

#### Reasons for using the Internet by New Zealand Leisure Visitors to Australia and Victoria, 2010

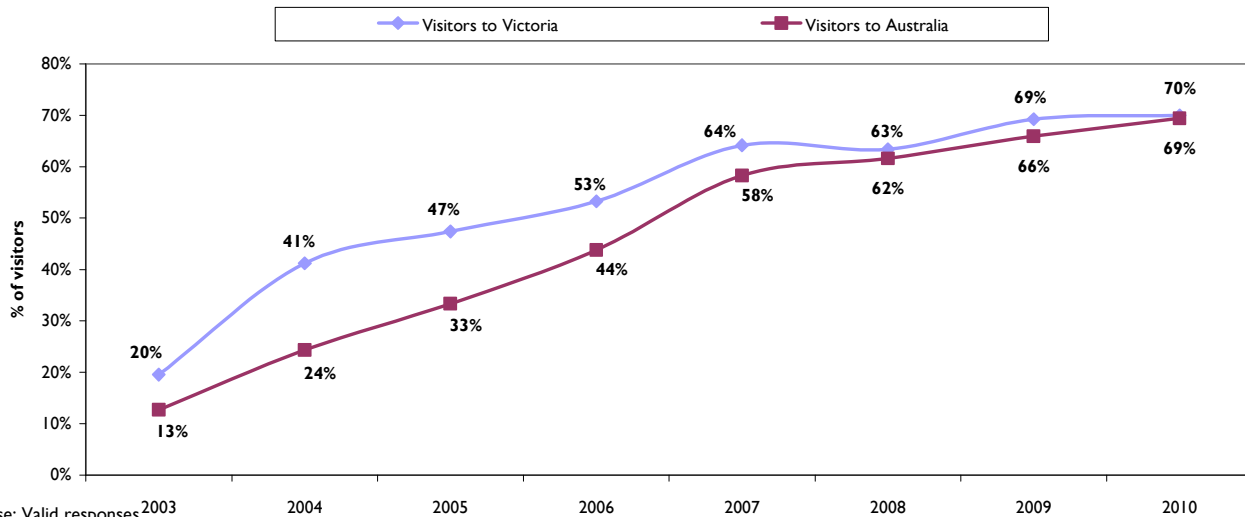


Base: Those who used the Internet as an Information Source.

Of New Zealand overnight leisure visitors to Victoria who used the internet in their holiday planning, 69% used it to look for airfares and schedules for their trip to Australia. Other uses included looking for accommodation (41%), to find out about events and activities (35%), and to help plan an itinerary (32%).

## 4.2 Internet Booking

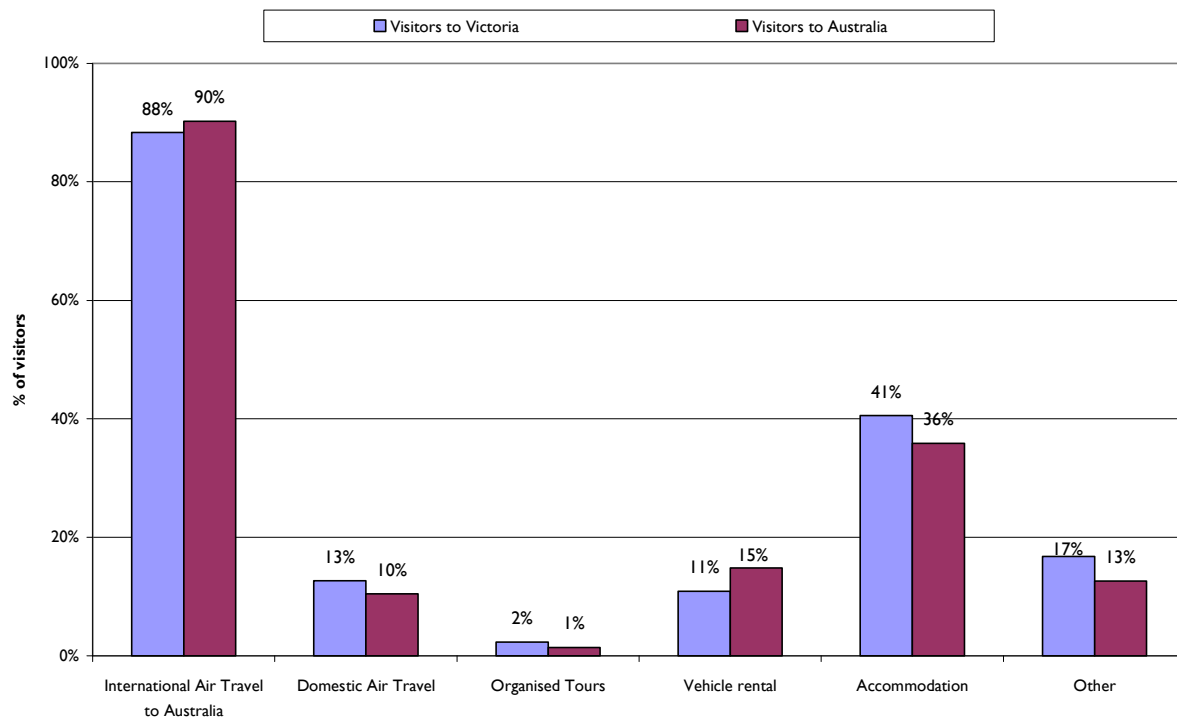
### Incidence of Online Booking among New Zealand Overnight Leisure Visitors, 2003-2010



Base: Valid responses

Strong growth in the incidence of online booking among NZ leisure visitors to Australia is evident, increasing from 13% in 2003 to 69% in 2010. Overnight leisure visitors to Victoria from New Zealand were slightly more likely to book at least one component of the trip online, with 70% reporting usage of online booking methods in 2010.

### Trip Components Booked Online among New Zealand Overnight Leisure Visitors, 2010



Base: Booked on-line

Among leisure visitors from New Zealand booking travel online, international air fares (88% and 90%) and accommodation (41% and 36%) were the most frequently purchased components by visitors to Victoria and Australia.

### 4.3 Planning and Booking Horizons

	Visitors to Australia	Visitors to Victoria
Planning Horizon (average weeks)	11.9	10.4
Booking Horizon (average weeks)	9.1	8.3

Among New Zealand leisure visitors to Australia, the average planning horizon was 11.9 weeks with a slightly shorter horizon for visitors to Victoria (10.4 weeks). However, 35% of visitors to Australia indicated a lead time of less than 4 weeks for planning (38% for visitors to Victoria).

For leisure visitors to Australia, flight booking occurred an average of 9.1 weeks prior to departure, with overnight leisure visitors to Victoria recording a slightly shorter lead time of 8.3 weeks. 43% of flight bookings to Australia and 44% of flight bookings among overnight leisure visitors to Victoria occurred within a month of departure.

Sources:

- *International Visitor Survey*, year ending December 2000-2010, Tourism Research Australia
- *International Tourism Expenditure in Australia's regions 2000-2010*, Tourism Research Australia
- Tourism Forecasting Committee Forecast 2010: Issue 1 (June 2010) and Issue 2 (December 2010).
- Tourism Australia Corporate Website: <http://www.tourism.australia.com/en-au/marketing/experience-seekers.aspx>, February 2010.

Further information: [www.tourism.australia.com/Markets.asp](http://www.tourism.australia.com/Markets.asp)

[www.tourism.vic.gov.au/facts-and-figures/](http://www.tourism.vic.gov.au/facts-and-figures/)

Figures that are unreliable and unable to be published are represented by '-'. Percentages in red italics are unreliable and should be used with caution.

Figures might not add up due to rounding.