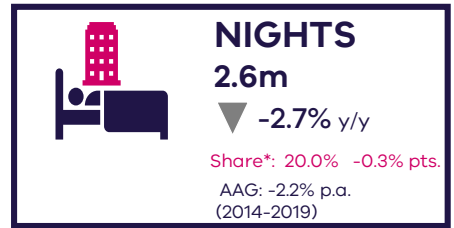
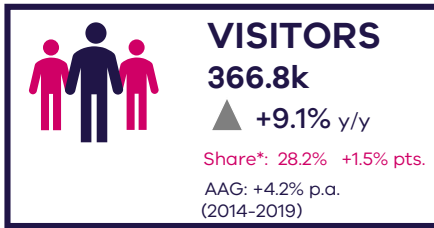
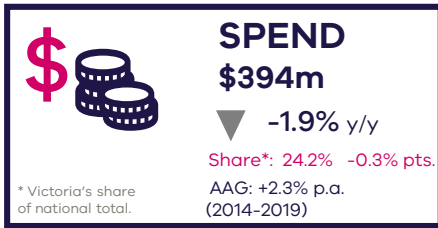


International Tourism Summary: New Zealand

Year ending December 2019

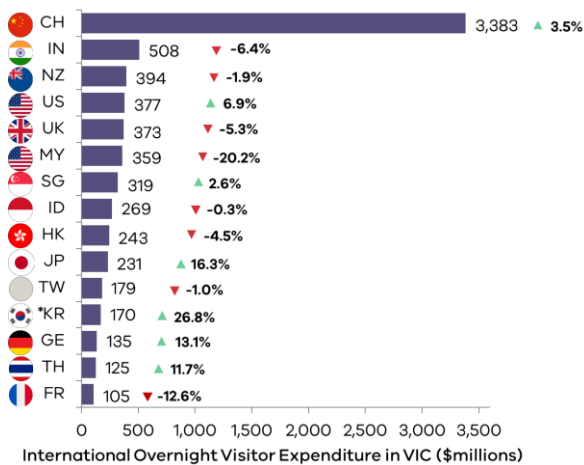


366,800 New Zealand visitors spent 2.6 million nights and \$394 million on trips to Victoria in the year ending December 2019.

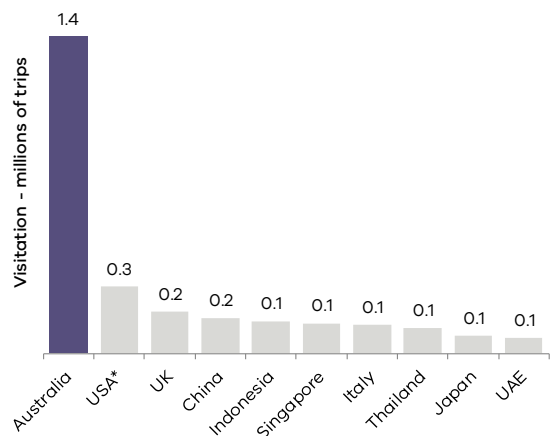


Context: In the year ending December 2019, international overnight visitors to Victoria (3.1 million) accounted for 3 per cent of total visitors to the state and 27 per cent (\$8.8 billion) of total visitor expenditure in Victoria.

International Overnight Expenditure in Victoria (\$m)



Top 10 Out-of-Region Destinations for New Zealand Travellers



New Zealand visitors spent \$394 million on trips to Victoria in the year ending December 2019, a year-on-year decline of 1.9 per cent. This represents 4.5 per cent of all international overnight visitor spend in Victoria. New Zealand is ranked Victoria's 3rd largest international market in terms of expenditure.

Australia was ranked #1 for visitation against other out-of-region destinations for New Zealand travellers in the year ending December 2019 (the same as in 2018).

*USA including Hawaii Source: Tourism Economics, YE2019

* In the year ending December 2019, all Korean visitors to Australia were from South Korea.

AUSTRALIA



Spend
\$1.6b ▼ -0.8%
Visitors
1.3m ▲ 3.2%
Nights
13.0m ▼ -1.2%

NEW SOUTH WALES



Spend
\$413m ▼ -11.2%
Visitors
445k ▲ 0.7%
Nights
3.4m ▼ -9.4%

QUEENSLAND



Spend
\$605m ▲ 4.7%
Visitors
489k ▲ 1.3%
Nights
4.8m ▼ -5.2%

The rate of decline of New Zealand expenditure on trips to Victoria (-1.9% year-on-year) was softer than the decline in New South Wales (-11.2%) but greater than the national average (-0.8%) and in contrast to growth in Queensland (+4.7%).

MELBOURNE



Spend
\$338m ▼ -1.9%
Visitors
333k ▲ 8.6%
Nights
2.0m ▼ -6.7%

REGIONAL VICTORIA



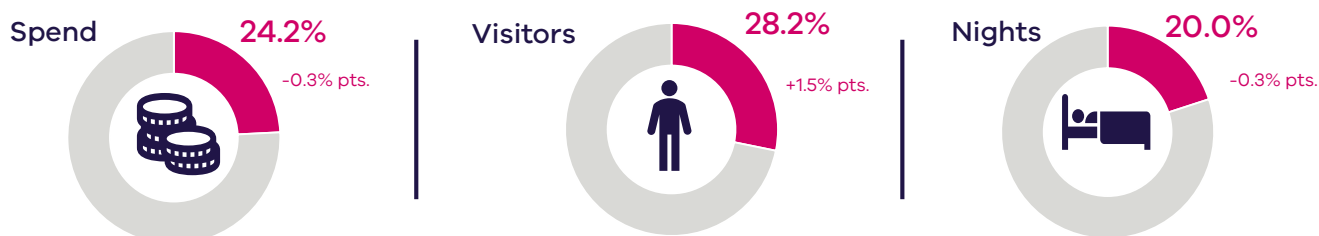
Spend
\$56m ▼ -2.4%
Visitors
69k ▲ 5.4%
Nights
620k ▲ 12.8%

In the year ending December 2019:

- 333,000 New Zealand visitors spent 2.0 million nights and \$338 million on trips to Melbourne
- 69,000 New Zealand visitors stayed 620,000 nights and spent \$56 million on trips to regional Victoria.

New Zealand Spend, Visitors and Nights by Key States Visited

Victoria's Market Share of New Zealand spend, visitors and nights



New Zealand Overnight Expenditure in Australia by Key States, 2014-2019

Expenditure by Visitors from New Zealand Year Ending December	Total Expenditure (\$ million)					Share of National %			Expenditure Per Night \$			Expenditure Per Visitor \$		
	2014	2018	2019	Av Ann 14-19	% Change 18-19	2014	2018	2019	2014	2018	2019	2014	2018	2019
New South Wales	447	466	413	-1.6% p.a.	-11.2%	28.4%	28.3%	25.4%	107	125	122	1,075	1,055	929
Victoria	352	402	394	2.3% p.a.	-1.9%	22.3%	24.5%	24.2%	122	151	152	1,180	1,196	1,074
Queensland	512	578	605	3.4% p.a.	4.7%	32.5%	35.2%	37.1%	105	115	127	1,241	1,196	1,237
Australia	1,575	1,643	1,630	0.7% p.a.	-0.8%				104	125	126	1,386	1,305	1,255

Total VIC International Expenditure	4,903	8,467	8,826	12.5% p.a.	4.2%
New Zealand's Share of VIC International Expenditure	7.2%	4.7%	4.5%		

AAG = Average Annual Growth

NB: Visitor expenditure includes expenditure on packages attributable to destination. Estimates may differ from those published by Tourism Australia

Source: Regional Expenditure Model, International Visitor Survey, December 2014-2019, Tourism Research Australia, Canberra.

Victoria received 24.2 per cent of New Zealand overnight visitors' expenditure in Australia in the year ending December 2019, behind Queensland (37.1%) and New South Wales (25.4%). New Zealand visitors' expenditure per night in Victoria (\$152) was higher than the national average (\$126) as well as Queensland (\$127) and New South Wales (\$122). Victoria received a higher total spend per visitor (\$1,074) compared with New South Wales (\$929), but lower than in Queensland (\$1,237).

New Zealand Overnight Visitation (000s) to Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Visitors %
							% change 14/19	% change 18/19	
Australia	1,136	1,189	1,219	1,233	1,259	1,299	2.7% p.a.	3.2%	
New South Wales	416	421	444	441	441	445	1.3% p.a.	0.7%	34%
Victoria	298	330	332	335	336	367	4.2% p.a.	9.1%	28%
Queensland	413	423	441	465	483	489	3.5% p.a.	1.3%	38%

New Zealand overnight visitors to Victoria increased by 9.1 per cent in the year ending December 2019, ahead of the national average (+3.2%) and key competitor states Queensland (+1.3%) and New South Wales (+0.7%) in the year ending December 2019. Over the longer term (2014 to 2019), New Zealand overnight visitors to Victoria increased at an average annual rate of 4.2 per cent, ahead of the national average (+2.7% p.a.), Queensland (+3.5% p.a.) and New South Wales (+1.3% p.a.).

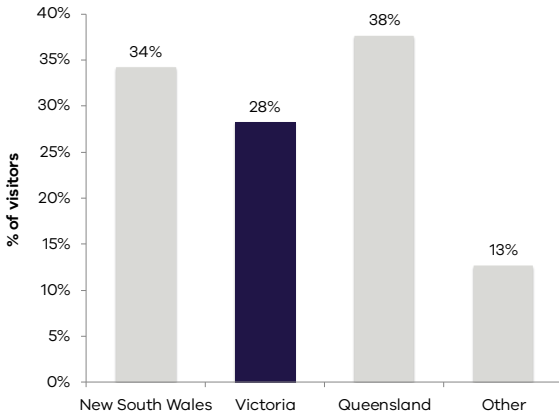
New Zealand Visitor Nights (000s) in Australia by Key States, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual		Share of Nights %
							% change 14/19	% change 18/19	
Australia	15,099	16,013	14,929	13,046	13,108	12,953	-3.0% p.a.	-1.2%	
New South Wales	4,170	4,391	4,427	3,531	3,731	3,379	-4.1% p.a.	-9.4%	26%
Victoria	2,894	3,295	3,037	2,637	2,668	2,595	-2.2% p.a.	-2.7%	20%
Queensland	4,869	5,257	5,098	4,877	5,030	4,768	-0.4% p.a.	-5.2%	37%

In the year ending December 2019, New Zealand visitor nights to Victoria declined by 2.7 per cent year-on-year, behind a slower decline nationally (-1.2%) but ahead of stronger declines in New South Wales (-9.4%) and Queensland (-5.2%). Over the longer term (2014 to 2019), New Zealand visitor nights spent in Victoria declined at an average annual rate of 2.2 per cent, softer than the decline in the national average (-3.0% p.a.) and New South Wales (-4.1% p.a.) but stronger than in Queensland (-0.4% p.a.).

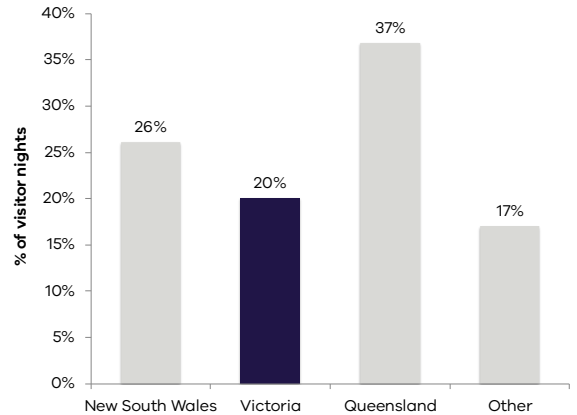
Market Share by Key States¹

New Zealand Overnight Visitors to Australia
Year ending December 2019 – Market Share by Key States



In the year ending December 2019, 28 per cent of New Zealand visitors to Australia stayed overnight in Victoria; behind Queensland (38%) and New South Wales (34%).

New Zealand Visitor Nights to Australia
Year ending December 2019 – Market Share by Key States



Victoria's market share of visitor nights spent by New Zealand travellers to Australia in the year ending December 2019 was 20 per cent; behind Queensland (37%) and New South Wales (26%).

Main Purpose of Trip (000s) to Australia by Key States Visited and Market Share

Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Employment	Other reason	Total
New South Wales	155	159	314	100	7	19	445
Market Share %	31%	33%	32%	43%	30%	43%	34%
Victoria	131	139	270	77	6	10	367
Market Share %	26%	29%	27%	33%	23%	23%	28%
Queensland	237	178	415	52	8	11	489
Market Share %	47%	37%	42%	22%	33%	26%	38%
Australia	505	481	985	233	25	43	1,299

* Total Leisure = Holiday + VFR

NB: Figures for 'Education' visitors are unreliable and are unable to be published

In the year ending December 2019, 27 per cent of New Zealand leisure visitors to Australia stayed overnight in Victoria, including 26 per cent of holiday and 29 per cent of visiting friends and relatives (VFR) visitors. New South Wales' share of New Zealand leisure visitors was higher at 32 per cent, as was Queensland's share (42%). During the same period, Victoria's share of the New Zealand business market was 33 per cent and employment market share was 23 per cent.

Purpose of Visit to Victoria (and the Destinations Within)

Some international visitors to Victoria visit more than one destination in the state, and for different purposes. For example, a visitor might stay in Melbourne for education reasons, and visit the Great Ocean Road region for a holiday. As such, the percentages of international visitors who visited Victoria for each purpose total more than 100 per cent.

New Zealand Overnight Expenditure and Visitation to Victoria by Destination Purpose of Visit – Year Ending December 2019

Year Ending December 2019	Holiday	Visiting friends and relatives	Total Leisure*	Business	Total
Overnight Expenditure (\$M)	145	127	273	80	394
Overnight Visitors (000s)	133	168	276	74	367
Visitor Nights (000s)	625	1,270	1,895	308	2,595
Average Length of Stay	4.7	7.6	6.9	4.1	7.1
Spend per Visitor	1,092	759	989	1,074	1,074
Spend per Night	233	100	144	259	152

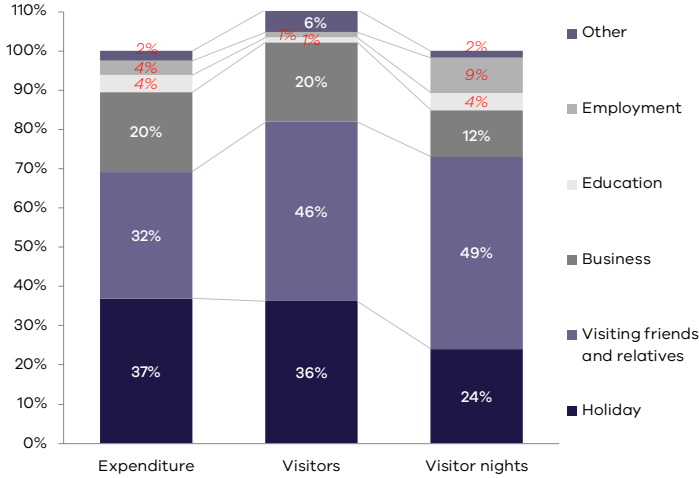
* Total Leisure = Holiday + VFR (NB total leisure may equal more than the sum of holiday + VFR, since visitors can visit more than one destination in Victoria with more than one purpose)

NB: Figures for 'Education', 'Employment' and 'Other' visitors are unreliable and are unable to be published

¹NOTE: 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.

New Zealand Overnight Expenditure, Visitors and Nights to Victoria by Purpose of Visit

Year Ending December 2019



In the year ending December 2019, over two-thirds (69%) of New Zealand visitor expenditure in Victoria was accounted for by leisure visitors, comprising holiday visitor expenditure (37%) and VFR visitor expenditure (32%)*. A further 20 per cent was accounted for by New Zealand business visitors.

During the same period, 46 percent of New Zealand visitors travelled to Victoria for VFR purposes, 36 per cent travelled for a holiday and a further 20 per cent came for business.

Almost half (49%) of all nights spent in Victoria by New Zealand visitors in the year ending December 2019 were accounted for by VFR visitors, followed by holiday (24%) and business (12%) visitors.

*Figures might not add up due to rounding.

Note: Percentages of visitors will not add up to 100% as visitors can travel to multiple destinations in Victoria with different purposes.

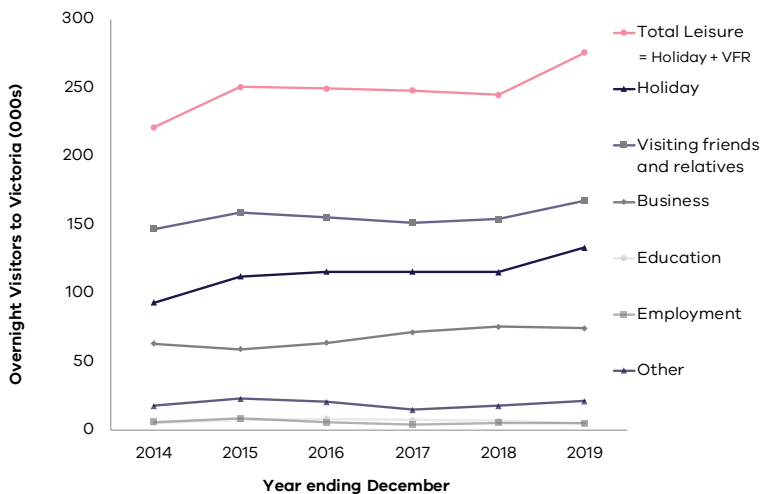
Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

New Zealand Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Holiday	93	112	115	116	115	133	7.4% p.a.	15.5%
Visiting friends and relatives	147	159	155	152	154	168	2.7% p.a.	8.9%
Total Leisure	221	251	249	248	245	276	4.5% p.a.	12.7%
Business	63	59	63	71	75	74	3.3% p.a.	-1.7%
Education	5	7	8	7	7	-	-	-
Employment	6	8	5	-	5	-	-	-
Other	18	23	20	15	18	21	3.7% p.a.	19.7%

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

New Zealand Overnight Visitation (000s) to Victoria by Destination Purpose of Visit, 2014-2019

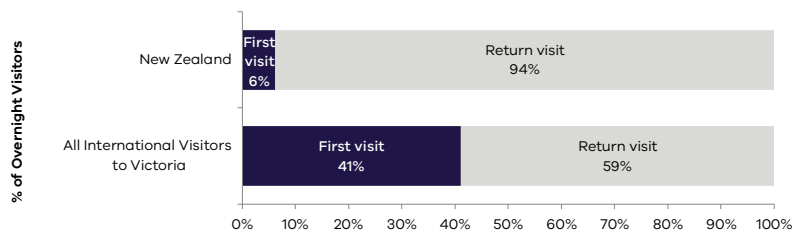


Of all the main purpose segments, the New Zealand holiday market has provided the strongest growth to overnight visitor numbers to Victoria over the past five years (+7.4% p.a.), followed by business (+3.3% p.a.) and VFR (+2.7% p.a.).

New Zealand leisure visitors to Victoria overall have increased at an average annual rate of 4.5 per cent over the period 2014-2019.

Repeat Visitation to Australia

Repeat Visitation to Australia (% of New Zealand overnight visitors to Victoria vs all international overnight visitors to Victoria)



In the year ending December 2019, only six per cent of overnight visitors from New Zealand to Victoria were visiting Australia for the first time, compared with 41 per cent of international overnight visitors to Victoria overall.

Melbourne and Regional Victoria Overnight Visitation

New Zealand Overnight Visitation (000s) to Victoria, 2014-2019

Year Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	275	304	303	305	307	333	3.9% p.a.	8.6%
Regional Victoria	54	66	67	65	66	69	4.9% p.a.	5.4%
Victoria	298	330	332	335	336	367	4.2% p.a.	9.1%

There were 333,000 New Zealand overnight visitors to Melbourne in the year ending December 2019, an 8.6 per cent increase over the previous year. New Zealand visitors to Melbourne have grown at an average annual rate of 3.9 per cent over the period 2014 to 2019.

In the year ending December 2019, there were 69,000 New Zealand overnight visitors to regional Victoria, a 5.4 per cent increase year-on-year. Over the longer term (2014-19), New Zealand overnight visitors to regional Victoria have grown at an average annual rate of 4.9 per cent per annum.

New Zealand Visitor Nights (000s) to Victoria, 2 years² (rolling), 2014-2019

2 Years Ending December	2014	2015	2016	2017	2018	2019	Av Annual % change 14/19	% change 18/19
Melbourne	4,773	5,168	5,271	4,727	4,315	4,094	-3.0% p.a.	-5.1%
Regional Victoria	965	1,022	1,061	947	990	1,169	3.9% p.a.	18.1%
Victoria	5,739	6,189	6,332	5,674	5,304	5,263	-1.7% p.a.	-0.8%

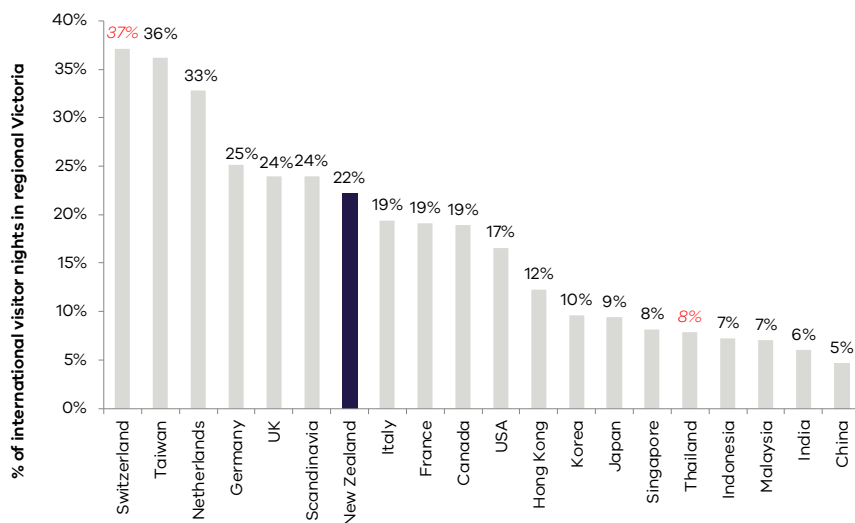
New Zealand visitors spent 4.1 million nights in Melbourne in the two years ending December 2019, a decline of 5.1 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in Melbourne declined at an average annual rate of 3.0 per cent.

In the two years ending December 2019, New Zealand visitors spent 1.2 million nights in regional Victoria, representing an increase of 18.1 per cent compared with the two years ending December 2018. During the period 2014 to 2019 (using two years of data per annum*), visitor nights spent in regional Victoria increased at an average rate of 3.9 per cent.

* where 2014 includes years ending December 2013 and 2014 and 2019 includes years ending December 2018 and 2019.

Regional Dispersal

Regional Dispersal of Top 20 International Overnight Markets to Victoria – 2 Years Ending December 2019



Of the 5.3 million nights spent in Victoria by New Zealand visitors in the two years ending December 2019, 22 per cent (1.2 million) of them were spent in regional Victoria.

New Zealand visitors to Victoria have the 7th highest rate of overnight dispersal of all the state's top 20 international markets.

Note: Percentages in red are based on small survey samples and are subject to high levels of sampling variability. Results should be interpreted with caution.

² Two years of data are used to increase reliability of the figures.

Places Visited in Regional Victoria and Melbourne Attractions

Places Visited in Regional Victoria – Year Ending December 2019

Selected Places Visited - Overnight Visit or Daytrip (% of all Overnight Visitors to Victoria)	New Zealand Visitors	All International Visitors
Ballarat, Sovereign Hill	4%	6%
Bendigo	3%	3%
Daylesford, Hepburn Springs, Mt. Macedon	2%	1%
Geelong & the Bellarine Peninsula	7%	9%
Great Ocean Road/Twelve Apostles	6%	33%
Healesville Sanctuary	-	2%
Mornington Peninsula	6%	8%
Phillip Island/Penguin Parade	3%	17%
Puffing Billy and Dandenong Ranges	3%	10%
Victorian Snowfields	-	2%
Wilson's Promontory	-	3%
Yarra Valley	6%	12%

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

In the year ending December 2019, seven per cent of New Zealand overnight visitors to Victoria spent time (daytrip or overnight) in the Geelong and the Bellarine Peninsula, compared with nine per cent of international overnight visitors to Victoria overall.

Six per cent (6%) of New Zealand overnight visitors to Victoria went each of the following: the Yarra Valley (compared with 12 per cent of international visitors overall), Great Ocean Road/Twelve Apostles region (compared with 33 per cent of international visitors overall) and the Mornington Peninsula (compared with eight per cent of international overnight visitors to Victoria overall).

Melbourne Attractions Visited – Year Ending December 2019

Selected Places Visited - Melbourne Attractions (% of Overnight Visitors to Victoria)	New Zealand Visitors	All International Visitors
Australian Centre for the Moving Image (ACMI)	-	4%
Brunswick Street	11%	10%
Chadstone Shopping Centre	10%	15%
Chapel Street	9%	9%
Crown Casino/entertainment complex	18%	19%
Docklands/Marvel Stadium (prev. Etihad Stadium)	21%	19%
Federation Square	26%	38%
Melbourne CBD Shopping Precinct	53%	63%
Melbourne Cricket Ground (MCG)	5%	6%
Melbourne Museum (Royal Exhibition Building)	10%	16%
Melbourne Zoo	4%	8%
National Gallery of Victoria (NGV)	11%	17%
Queen Victoria Market	26%	44%
Shrine of Remembrance	5%	12%
Southbank/Southgate	29%	26%
St Kilda	21%	28%

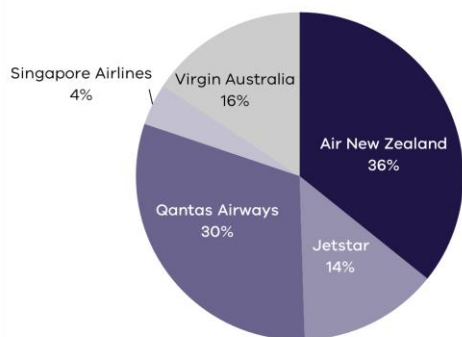
NB: Where there is a '-', figures are unreliable and are unable to be published.

The most visited Melbourne attractions by New Zealand overnight visitors to Victoria were the CBD shopping precinct (53 per cent compared with 63 per cent of international visitors overall), Southbank/Southgate (29 per cent compared with 26 per cent of international visitors overall), Federation Square (26 per cent compared with 38 per cent of international visitors overall) and the Queen Victoria Market (26 per cent compared with 44 per cent of international visitors overall).

Other attractions that New Zealand visitors were more likely to visit compared to international visitors overall were Docklands/Marvel Stadium (21 per cent compared with 19 per cent of international overnight visitors overall) and Brunswick Street (11 per cent compared with 10 per cent of international overnight visitors overall).

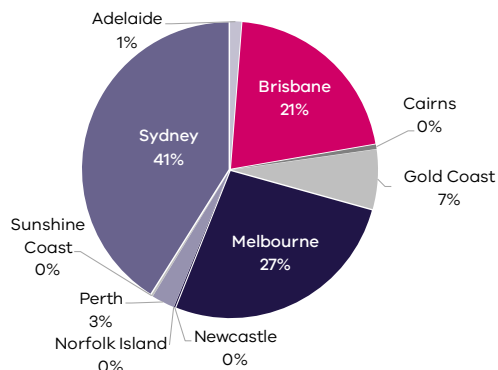
Aviation³

Airline Market Share – Direct Seats into Melbourne from New Zealand – Year ending December 2019



In the year ending December 2019, Air New Zealand contributed 36 per cent of the 1.3 million available seats on direct flights from New Zealand to Melbourne, followed by Qantas Airways (30%), Virgin Australia (16%) and Jetstar (14%).

Direct Flight Market Share – Direct Seats into Australian Airports from New Zealand – Year ending December 2019



In the year ending December 2019, Melbourne received 27 per cent of the 5.0 million available seats on direct flights from New Zealand to Australia. Sydney received the highest share (41%) and Brisbane received 21 per cent of available seats.

³ Note: Aviation capacity is measured by "available seats", which includes international visitors and Australian residents returning home.

Sources:

- International Visitor Survey (IVS), years ending December 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Regional Expenditure Model (REX) 2014-2019, Tourism Research Australia (data released 8 April 2020)
- Tourism Australia Consumer Demand Project, Tourism Economics, April 2020
- International Airlines Operated Flights and Seats, year ending December 2019, Department of Infrastructure and Regional Development (BITRE)
- Visitor Arrivals and Departures, year ending December 2019, Tourism Research Australia

Base for IVS and Expenditure data: Only those trips where International visitors aged 15 years or over who have stayed in Australia for less than 12 months are in scope. Expenditure includes package expenditure.

Figures that are unreliable and unable to be published are represented by '-'. Figures might not add up due to rounding.

To view the full suite of 15 International Tourism Summaries (Victoria's top 15 international markets in terms of expenditure, visitors and nights), see <https://www.business.vic.gov.au/tourism-industry-resources/research/international-research>

For further information on IVS and Expenditure data sources used please refer to our Guide to Tourism Data Sources and Definitions document found here: <https://www.business.vic.gov.au/tourism-industry-resources/research/teve-research>

For further information on Tourism Australia's Consumer Demand Project, see <http://www.tourism.australia.com/en/markets-and-research/reports/consumer-research.html>

Further information on international visitor statistics: <https://www.tra.gov.au/international>;
<http://www.tourism.australia.com/en/markets-and-research/market-regions.html>

Factsheet produced by the TEVE Research Unit, May 2020.

Due care is taken in the production of this factsheet, however DJPR accepts no responsibility for the use of this information.