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Active Considerer (AC) Monitor

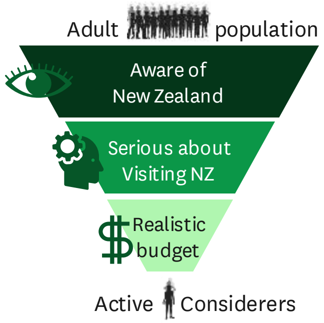
Americas (H1 FY24)

Report

January 2024

Appendix: AC Monitor research specifications

- Kantar conducts a **monthly online survey** in each of Tourism New Zealand's six tier 1 & 2 markets:
  - Australia, China, Germany, Japan, UK and USA
  - 150 ACs per country each month
  - Standard reporting is of a **six-month rolling average** which avoids month-by-month variability and ensures a focus on long term trends in the data – the exception to this is Q2 FY24 where results are based on a 5-month period (Jul – Nov 23)
- Kantar conducts a **bi-annual survey** for emerging markets:
  - Canada, India, South Korea and Singapore
  - 300 – 500 ACs per country per wave



- We survey **Active Considerers (ACs) of New Zealand**
  - ACs are those who are aware of New Zealand, **serious** about visiting and who have a **realistic** budget
- Kantar ensures a representative sample by **weighting** to the age, gender and region distribution of the online population
  - Online population estimates come from Kantar's 2023 market sizing exercise

Performance Dashboard

	USA Q4 FY23	USA Q2 FY24	Canada Q4 FY23	Canada Q2 FY24
Incidence of Active Considerers[(1)]	19%	18%	24%	28%
NZ as a #1 Preferred destination[(2)]	63%	63%	61%	57%
First	43%	46%	36%	31%
Second	19%	18%	25%	26%
Dreaming	48%	44%	60%	50%
Planning	10%	7%	18%	16%
Booking	41%	49%	22%	34%

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1. Sample sizes: Online population: USA Q4 FY23 (6MRA) n = 6310; Q2 FY23 (5MRA) n = 6269; Canada Q4 FY23 (Apr) n =1785; Q2 FY24 (Oct) n = 1374
2. Sample sizes: ACs USA Q4 FY23 (6MRA) n = 900; Q2 FY24 (5M) n = 750; Canada: Q4 FY23 (Apr '23) n = 300; Q2 FY24 (Oct '23) n = 300

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

Performance Dashboard

Brand areas to focus on

	USA – Strengths	USA – Dial up	Canada – Strengths	Canada – Dial up
	Wildlife experiences	Easy to travel around	Wildlife experience	Affordable to fly to
	Clean & unpolluted	Fun & enjoyment	Clean & unpolluted	Fun & enjoyable
	Indigenous culture	Excitement	Indigenous culture	All seasons
	Relationship with the land	Range of experiences	Safe destination	Relax & refresh
	Landscapes & scenery	Local culture	Relationship with the land	Family friendly

Top 5 competitors

(% selected destination in their top five preferred destinations)

	USA		Canada	
1	Italy	38%	Australia	34%
2	Australia	31%	Italy	33%
3	France	27%	Greece	26%
4	UK	27%	Hawaii	25%
5	Hawaii	27%	Caribbean	25%

Top 5 knowledge gaps

	USA	Canada
1	What the weather is like	Length of time required to fly to New Zealand
2	Where I should get information about organising a holiday	What the weather is like
3	How easy it is to travel around	How welcoming the locals are
4	How welcoming the locals are	How safe it is from crime
5	The length of time required to fly to New Zealand	How easy it is to travel around

Seasons

	USA Consideration	USA Preference	Canada Consideration	Canada Preference
Spring	25%	16%	23%	15%
Summer	46%	38%	48%	42%
Autumn	35%	25%	32%	21%
Winter	21%	13%	17%	12%

1. Sample sizes: ACs Q2 FY24 (5MRA) USA n = 750; Canada: Oct '22 n = 300

Key insights - USA

- With approximately 38 million ACs, the USA remains a major opportunity for TNZ to drive arrivals; however, with the AC incidence dropping from 30% Q2 FY20 to 23% Q2 FY23 to 18% in the latest quarter (Q2 FY24), the AC pool remains considerably smaller than it was pre-pandemic
  - The key contributing factor to the decline in incidence is a reduction in people's willingness to spend which most likely reflects a decline in discretionary spend and unfavourable economic conditions and the end of revenge travel
- There is a lot of pent-up demand among the existing ACs – their preference for New Zealand as a next destination to travel to is growing and 49% of ACs are ready to book a holiday – thus, to convert ACs into arrivals the emphasis should be maintaining high levels of preference for New Zealand over key competitors (Italy, Australia and France) and addressing key barriers to conversion
- Brand messages should promote New Zealand's strengths in its indigenous culture, relationship with the land, wildlife opportunities and cleanliness but do ensure these messages are balanced with other elements such as its ease of travelling around as well as opportunities to have a range of experiences, engage with local culture, and have fun – all of which emerge as stronger drivers of preference in 2023 yet represent areas New Zealand could perform better on relative to competitors
- Tactical communications should address growing knowledge gaps by guiding ACs to key information sources, such as newzealand.com, and providing travel options that highlight the ease of travelling around New Zealand. These communications should be surfaced as early as dreaming phase
- While preference to visit New Zealand is strongest for summer which creates some challenges in driving seasonal dispersal, there are opportunities to promote off-peak arrivals, particularly Autumn holidays which have stronger levels of consideration and preference than other off-peak seasons

Key insights

- Canada remains an attractive market for TNZ. The appeal of New Zealand as a holiday destination has increased since Oct 22, rising from 53% to 57%, and the AC incidence has also significantly improved, increasing from 24% in Apr 23 to 28%. This 28% incidence represents approximately 7.2 million ACs, 34% of whom are ready to book (equating to approximately 2.4 million people)

- With an AC incidence higher than all our key markets except China, the focus in Canada should be on growing preference for New Zealand among existing ACs and accelerating their conversion through the consideration funnel by addressing key concerns and barriers to booking.

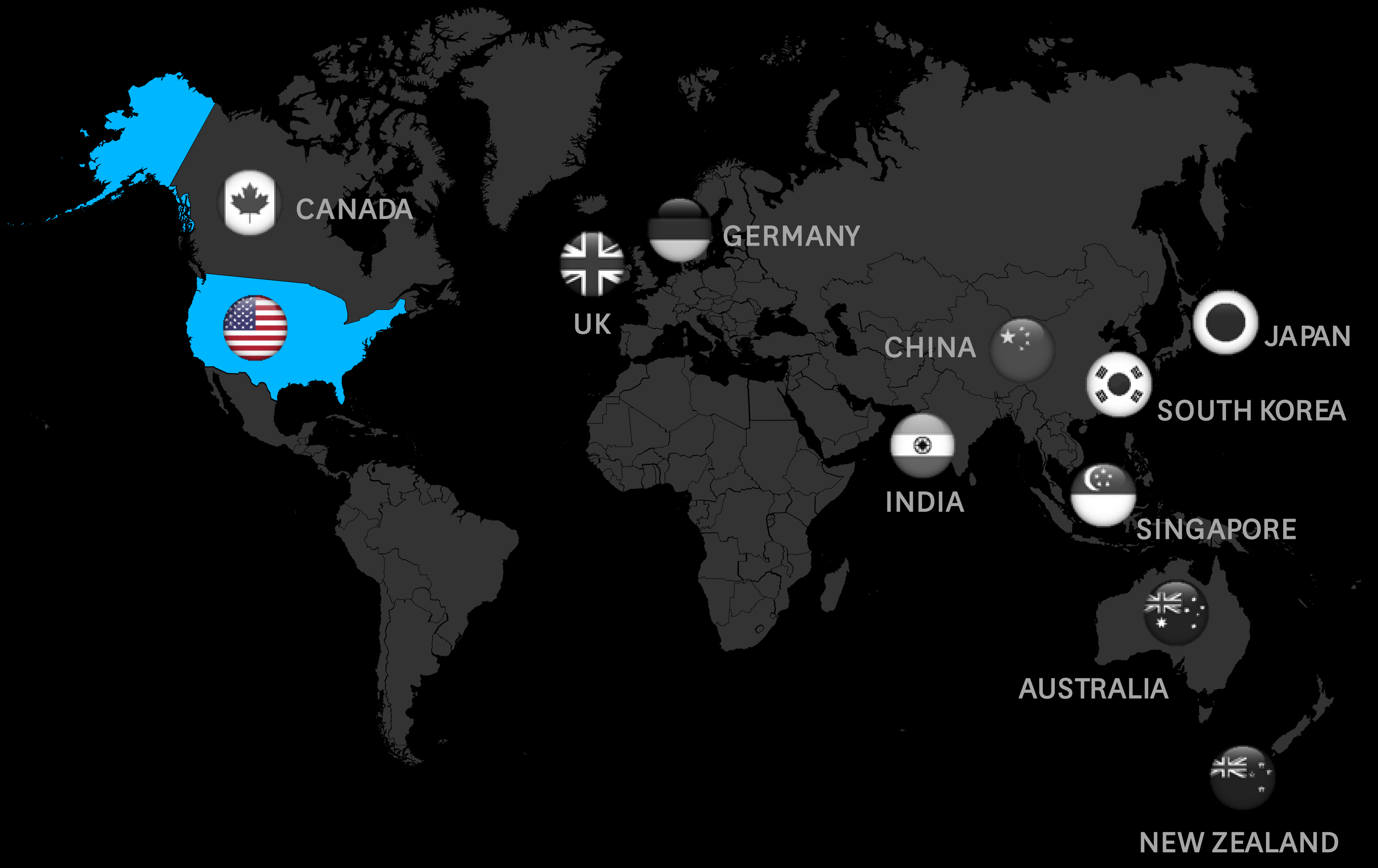
- While strategic brand messages should continue to emphasise New Zealand's strengths in its pristine environment and unique relationship with the land, the focus should be on strengthening perceptions on how New Zealand is fun and enjoyable as well as the range of experiences on offer

- Competitors to focus on are Australia, Italy and Greece as they represent the top three choices in terms of preference, although their destination advertising is at a slightly lower level of recognition to New Zealand

- Tactical marketing messages need to address key knowledge gaps and barriers to booking by helping ACs decide on the best time of the year to travel to New Zealand and the duration of their stay. Promoting holiday packages between 16 – 20 days will cater to the broadest range of ACs. Additionally, working with trade partners to offer deals on individual flights or bundled deals on flights and accommodation will help facilitate conversion of ACs - this tactical content needs to be featured across all funnel stages on channels such as YouTube and Search (see Project Connect for more detail)

- While preference to visit New Zealand is strongest for summer which creates some challenges in driving seasonal dispersal, there are opportunities to promote off-peak arrivals, particularly Autumn holidays which have stronger levels of consideration and preference than other off-peak seasons

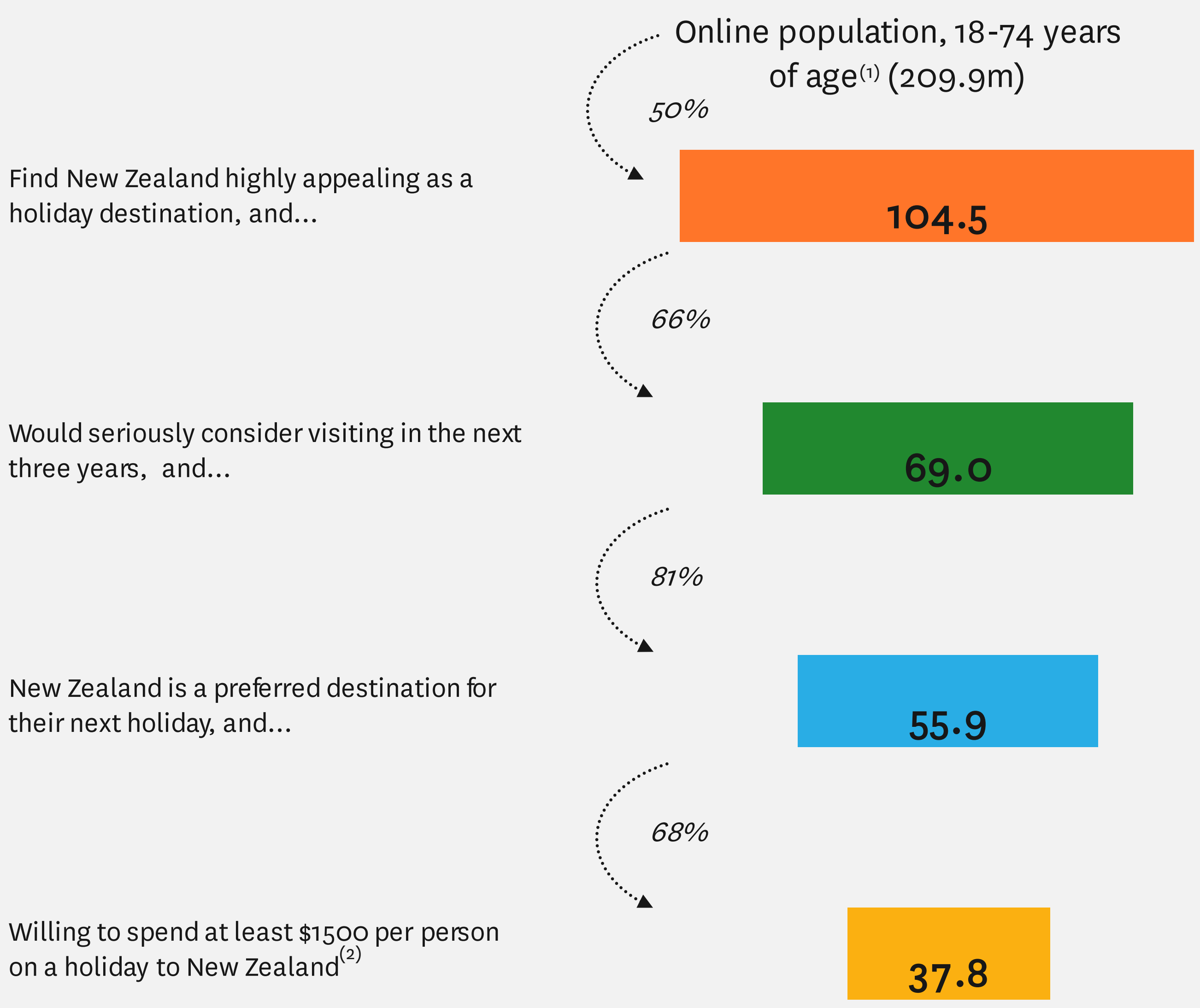
UNITED STATES OF AMERICA



Active Considerer journey funnel – USA

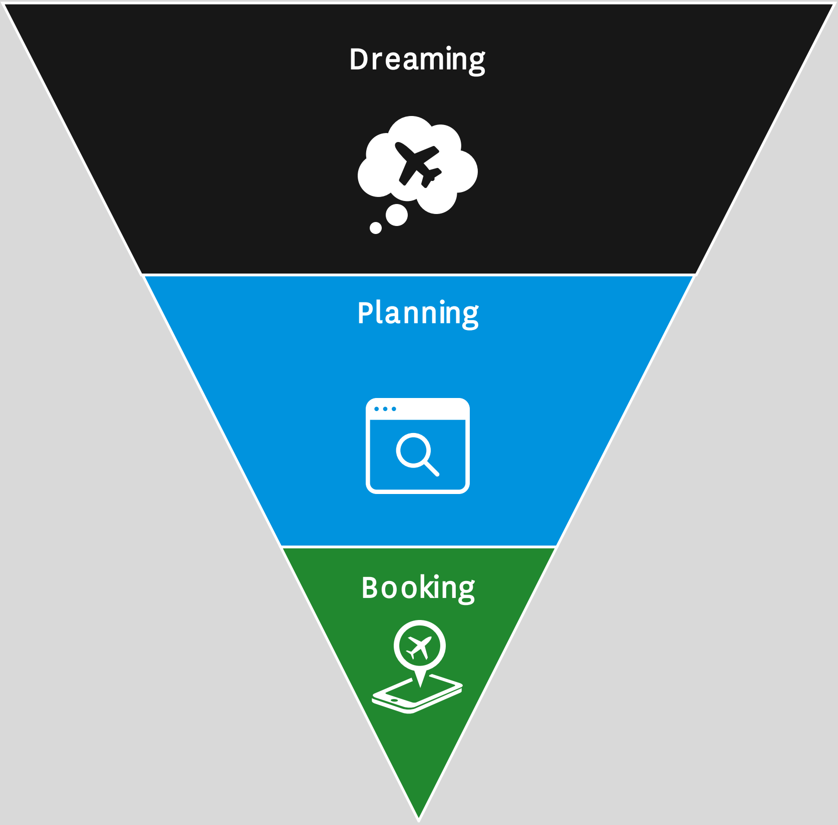
Active Considerers definition

Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation and have a realistic budget for their visit ($1500 USD per person on a holiday to New Zealand)



1. The approx. AC pool size is based on the online population estimates as of November 2023 and the AC incidence rate for the current five months
2. Including accommodation and daily expenses. Based off actual market data spend (IVS 2019)

Journey funnel to New Zealand - USA



Book to come to NZ
Moment of Truth

Size (%)

Active Considerers (37.8m)	AC's	Priority Mindset Group
16.6m	44%	54% ▲
2.7m	7%	10% ▲
18.5m	49%	35% ▼

Comments

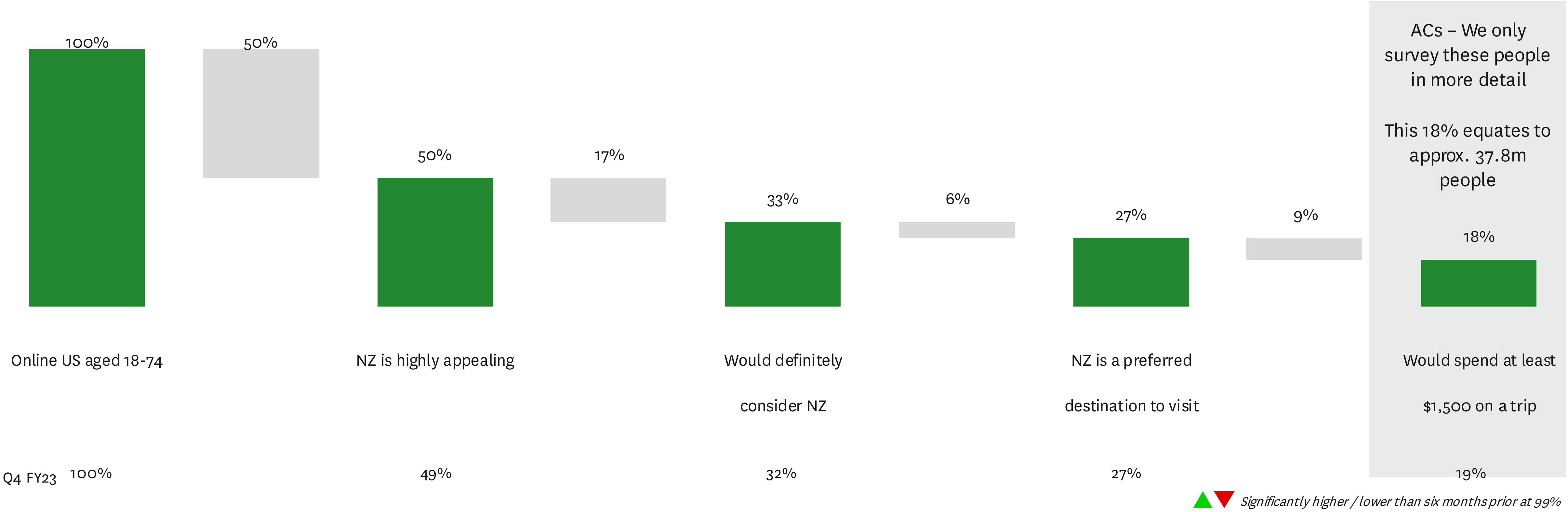
- 'Ready to book' is a claimed state of mind
- It doesn't mean ACs will book a flight tomorrow, if possible, to do so, but that the commitment to visit New Zealand is there, and they feel confident enough to consider it a place they'd book travel to
- A number of extrinsic (e.g. price, availability) and intrinsic (e.g. annual leave) factors need to align to make booking / conversion a reality
- We know that people continue researching and planning after reaching the 'ready to book' stage; it does not mean the end of engagement between consumers and TNZ / industry players

▲▼ *Significantly higher / lower than Non-Priority Mindset Group*

With an AC incidence of 18%, equating to approximately 37.8m ACs, USA presents a sizable opportunity for TNZ to convert arrivals

Qualifying criteria for defining ACs

AC Monitor | Current 5MRA | % Online users aged 18-74



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1. The approx. AC pool size is based on the online population estimates as of December 2022 and the AC incidence rate for the current five months
2. Sample size: n = 6269; Q4 FY23 n = 6310

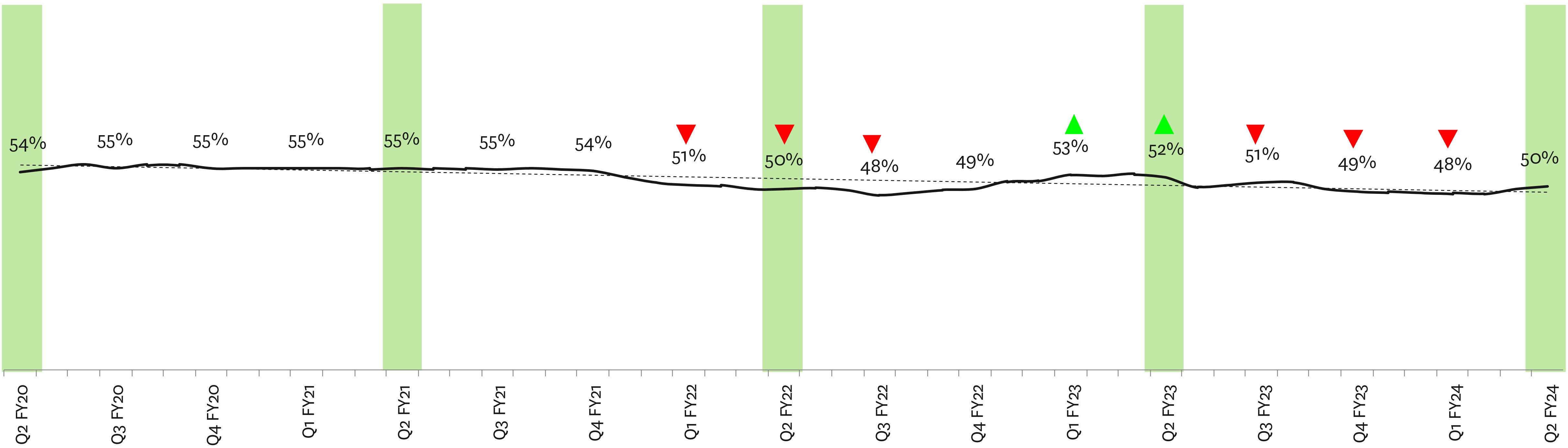
NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

Appeal of New Zealand has softened over the past year

Appeal

AC Monitor | 6MRA | Target online population aged 18-74

- Appeal is measured among the total online population aged 18 to 74 years old, and is the ‘above the funnel’ measure
- Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals
- Appeal is likely to be impacted by macro situation, scalable events (i.e., Rugby World Cup, NZ handling of Covid pandemic), and high impact earned mass-reach media TNZ efforts



Significantly higher / lower than six months prior at 99%

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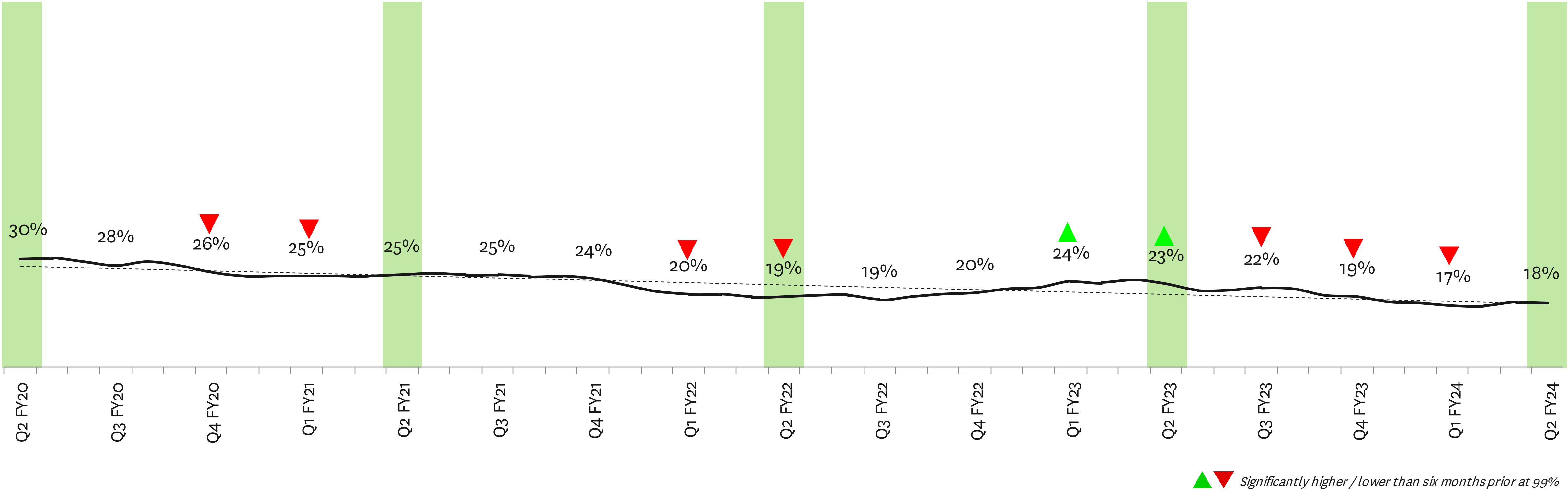
1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 3629, 3833, 4217, 4220, 4250, 4956, 5222, 6122, 6757, 6548, 5874, 6507, 6601, 5675, 6310, 7999, 6269
2. Question “Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?”

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

The AC incidence has been retracting over the last year, and at 18%, the AC pool is substantially lower than pre-pandemic levels

Incidence of ACs

AC Monitor | 6MRA | Target online population aged 18-74



1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 3629, 3833, 4217, 4220, 4250, 4956, 5222, 6122, 6757, 6548, 5874, 6507, 6601, 5675, 6310, 7999, 6269
2. % of population who find New Zealand as a holiday destination as highly appealing (%8-10), has strong consideration to holiday in New Zealand (%8-10), strongly prefers to holiday in New Zealand (%4-5), and would spend at least $1,500 USD while holidaying in New Zealand

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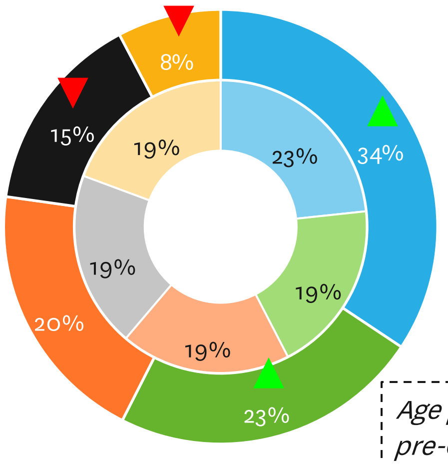
Compared to non-ACs, ACs are more likely to be aged 18-39 years, male and reside in the West; priority mindsets make up 36% of ACs

Profile of Active Considerer

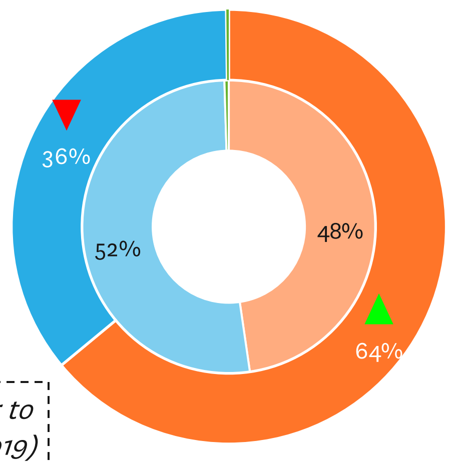
AC Monitor | Current 5MRA | Active Considerers vs Non-Active Considerers

Outer ring: USA Active Considerers
Inner ring : USA non-Active Considerers

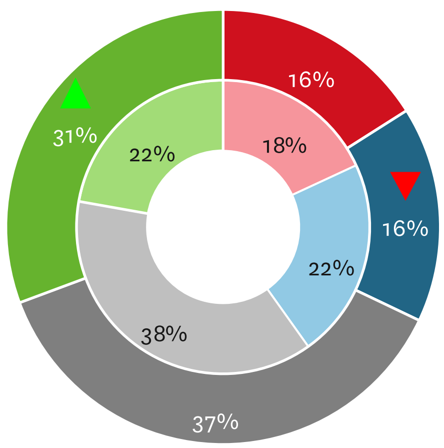
By age segment



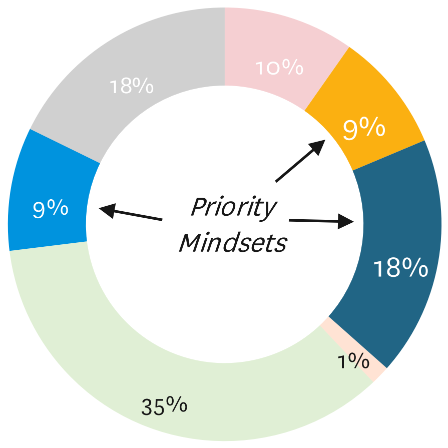
By gender



By region



Mindset Segments



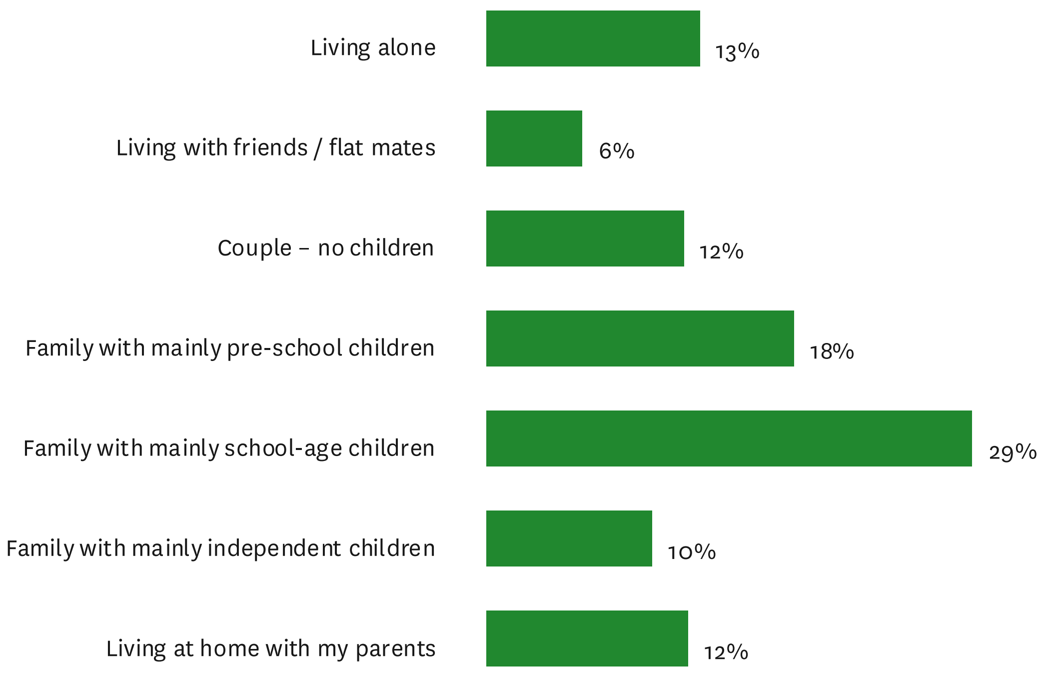
Significantly higher / lower than non-AC's

1. Sample sizes: ACs n = 750 | Non ACs n = 5519

Approaching half of ACs in the USA are families with dependent children

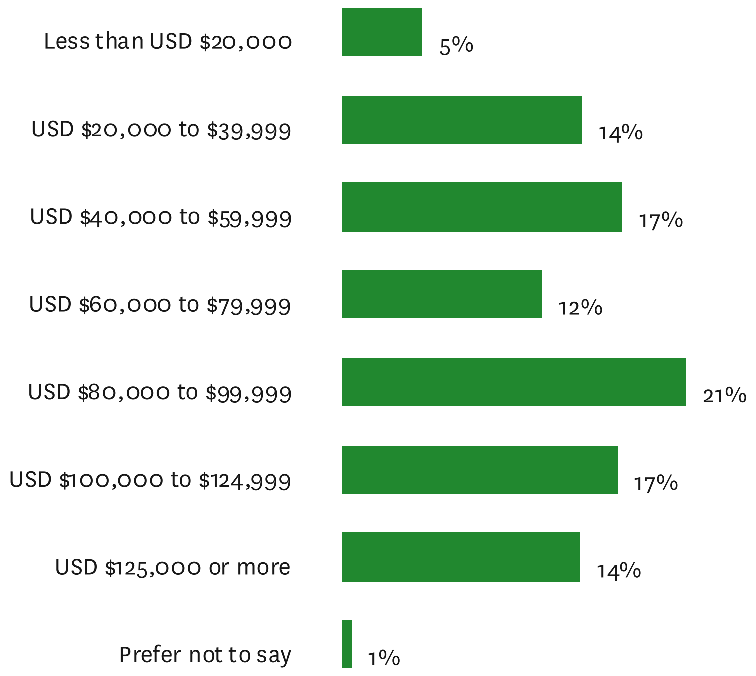
Household Composition

% Active Considerers | Current 5MRA



Household Income

% Active Considerers | Current 5MRA



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1. Sample size: n = 750
2. Q: "Which of these best describes your household?"
3. Q: "What is your total annual household income?"

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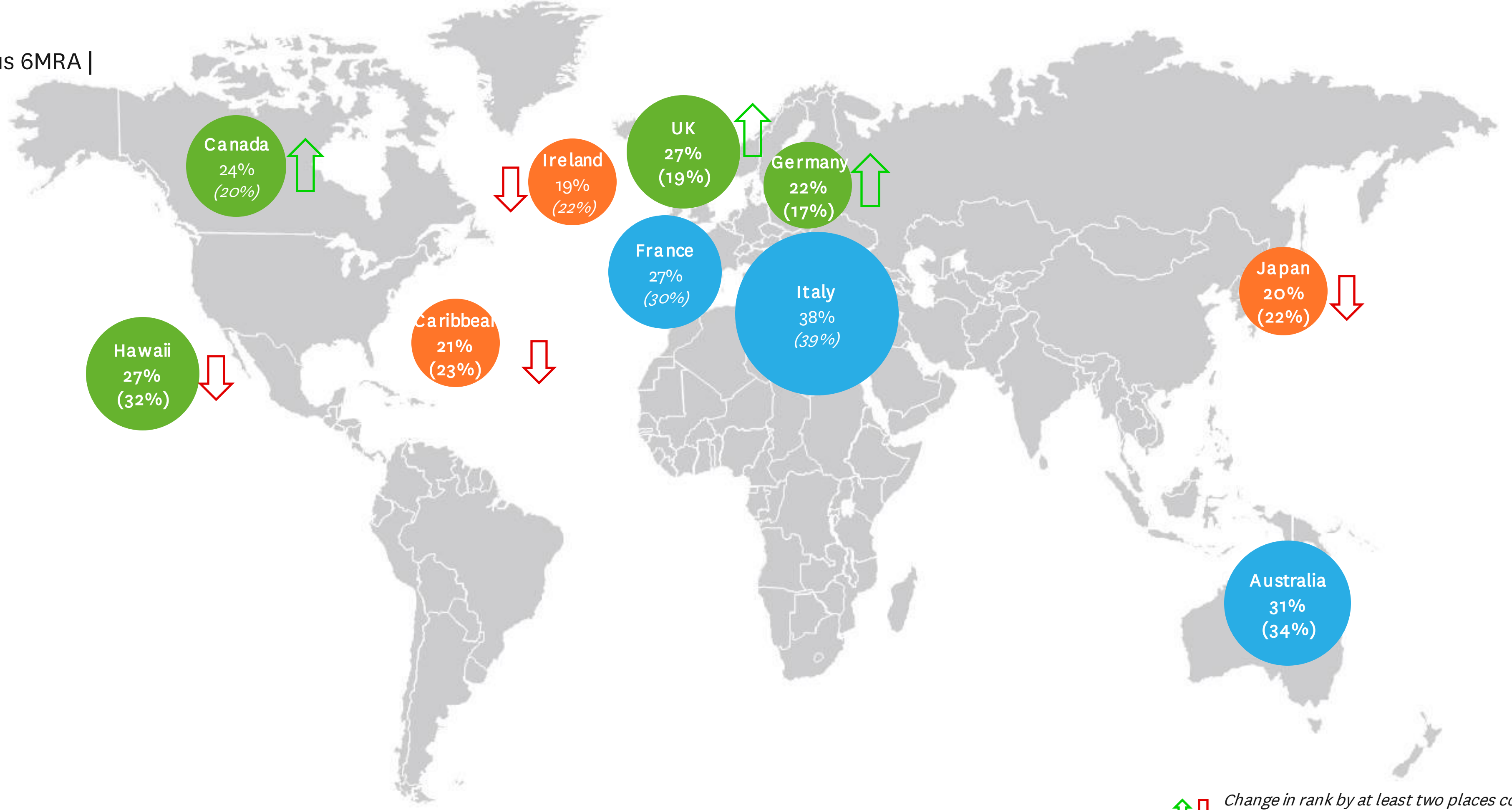
Based on preference, New Zealand's key competitors are Italy, Australia and France, closely followed by Hawaii as well as the UK, which has jumped in preference

Top ten competitor set for ACs

AC Monitor | Current 5MRA vs. Previous 6MRA | Total Active Considerers



Legend
- Top 3
- Rank 4-7
- Rank 8-10

Change in rank by at least two places compared to 6 months ago

1. Sample size: Current 5MRA n = 750; Previous 6 months n = 900
2. % selected destination in their top five preferred destinations
3. Figures in brackets denote previous 6 months
4. Question: "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"
5. *Hawaii was added to the destination list in June 22 so results for Q4 FY22 cannot be shown

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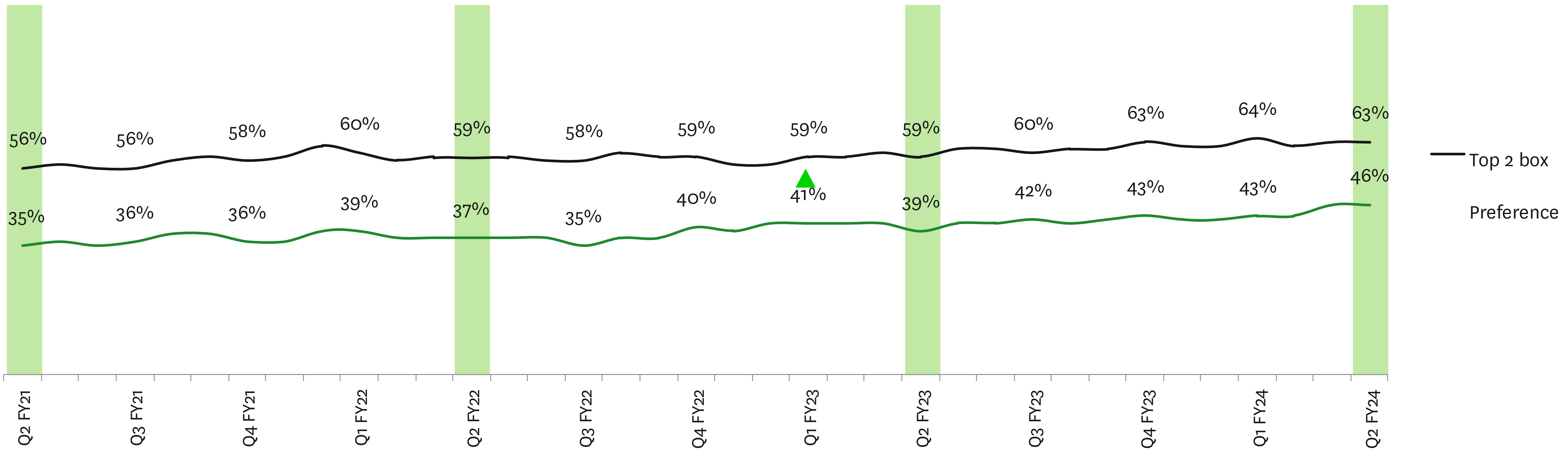
First-choice preference for New Zealand has been steadily strengthening to a high of 46%

New Zealand as a #1 Preferred Destination

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six months prior at 95%

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1. Sample size: Q2 FY21 – Q2 FY24 (6MRA) n = 909, 1059, 1050, 900, 899, 899, 899, 899, 900, 900, 900, 900, 900
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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Context to preference drivers

Using Jaccard's analysis, we estimate which destination attributes drive preference for New Zealand and how New Zealand performs relative to its key competitors in order to identify priority attributes to focus on in each market

We typically do brand preference driver analysis once a year on key markets

The brand driver analysis included in this report is based on the most recent results available: Data from Jul-23 to Dec-23.

A framework to organise and optimise how we leverage our brand associations

Strategic Brand Drivers Depending on brand positioning, what are the areas can TNZ leverage that might have higher impact on consumer decision making and connection – Drivers of unique, distinct New Zealand	**Key Category Differentiators** What are the key category issues that TNZ can use to stand out and cut-through with ACs?
Low Priority Drivers New Zealand drivers that allow us to differentiate but are not core to "who we are", does not drive mental availability, emotional resonance	**Hygiene Factors** What are the hygiene factors in the travel industry. TNZs journey should start here – Before communicating how our positioning exceeds expectations, we need to demonstrate these hygiene factors are in place.

Categorising destination brand associations to the framework…

Strategic Brand Drivers

- Landscapes & Scenery
- Embraces all visitors
- Unique experiences
- Relationship with the land
- Indigenous culture
- Exploration

Key Category Differentiators

- Clean and unpolluted
- Relax and refresh
- Friendly people
- Range of adventure
- Range of experiences
- All seasons
- Local culture
- Fun & Enjoyment
- Escape the ordinary
- Amazing beaches

Low Priority Drivers

- Wildlife experiences
- Interesting cities
- Iconic attractions/landmarks
- Quality Food and wine

Hygiene Factors

- Safe destination
- Affordable to fly to
- Affordable activities
- Family Friendly
- Easy to travel around
- Excitement

Appendix: Brand attribute wording

Wording for the preference drivers

Shorthand	Full wording
Affordable activities	Things to see and do are affordable
Affordable to fly to	It's affordable to fly to this destination
All seasons	Suitable for a holiday all year round
Clean & unpolluted	The environment there is clean and unpolluted
Easy to travel around	It's easy to travel around to see and do things
Embraces all visitors	A destination that embraces visitors of all cultures
Escape the ordinary	A place you can escape from the ordinary
Excitement	Thinking about visiting makes me feel really excited
Exploration	A place that invites exploration and discovery
Family friendly	Ideal for a family holiday
Friendly people	The locals are friendly and welcoming
Fun & enjoyment	Ideal for having fun and enjoying yourself
Iconic attractions	Has iconic attractions and landmarks

Shorthand	Full wording
Indigenous culture	Has a unique indigenous culture
Interesting cities	Has interesting cities to visit
Landscapes & scenery	Spectacular natural landscapes and scenery
Local culture	Offers opportunities to experience local culture
Quality food & wine	Offers quality local food and wine experiences
Range of adventure	Offers a wide variety of outdoor & adventure activities
Range of experiences	Offers a wide variety of tourist experiences
Relationship with the land	A destination where the people have a special relationship with the land
Relax & refresh	Ideal to relax and refresh
Safe destination	I would feel safe travelling around this destination
Unique experiences	Offers experiences that you can't get anywhere else
Wildlife	Has amazing wildlife experiences

While it is important to stay true to New Zealand's core holiday proposition, there is a need to build on other elements such as opportunities to have a variety of experiences, engage with local culture, escape and have fun – all of which are emerging as stronger drivers of preference

Top 15 drivers of preference for NZ

AC Monitor | % | 2023 (Jul-Dec 23) | Total Active Considerers | Index (see appendix)

Latest results	2023 rank	2022 rank[1]	2021 rank[1]
Fun & enjoyment	1	4 ⇧	8
Excitement	2	*	2
Easy to travel around	3 ⇧	26	24
Range of experiences	4 ⇧	19 ⇩	11
Range of adventure	5	8	6
Escape the ordinary	6 ⇧	11 ⇧	16
Unique experiences	7	10	9
Safe destination	8	6	7
Local culture	9 ⇧	13	15
Invites exploration	10	*	*
Clean & unpolluted	11	9 ⇩	3
Embrace all visitors	12 ⇧	20 ⇩	10
Relax & refresh	13	16 ⇩	5
Landscapes & scenery	14 ⇩	2	1
Wildlife	15 ⇧	28	*

Latest results	2023 rank	2022 rank[1]	2021 rank[1]
Friendly people	16	14 ⇩	4
Interesting cities	17	15 ⇧	21
Affordable activities	18 ⇧	29	28
Indigenous culture	19	17	*
Iconic attractions	20	22 ⇧	29
Relationship with the land	21 ⇩	5 ⇧	13
All seasons	22 ⇩	12 ⇧	22
Family friendly	23 ⇩	7 ⇧	12
Amazing beaches	24	*	23
Quality food & wine	25 ⇧	30 ⇩	19
Affordable to fly to	26 ⇧	31	32

Changes in brand attribution list affect comparability in ranking over time

Strategic Brand Drivers | Key Category Differentiators | Low Priority Drivers | Hygiene Factors

1. Some ranks may be missing if the statement has been removed for the current analysis period
2. 'Escape the ordinary' driver re-worded from 'Ideal for escaping normal daily life' to 'A place you can escape from the Ordinary' in FY24; 'Embraces visitors' driver re-worded from 'A destination that embraces visitors and wants them to enjoy their time there'' to 'A destination that embraces visitors of all cultures' in FY24

* Not asked at that time

⇧⇩ *Moved up / down in rank by four or more places*

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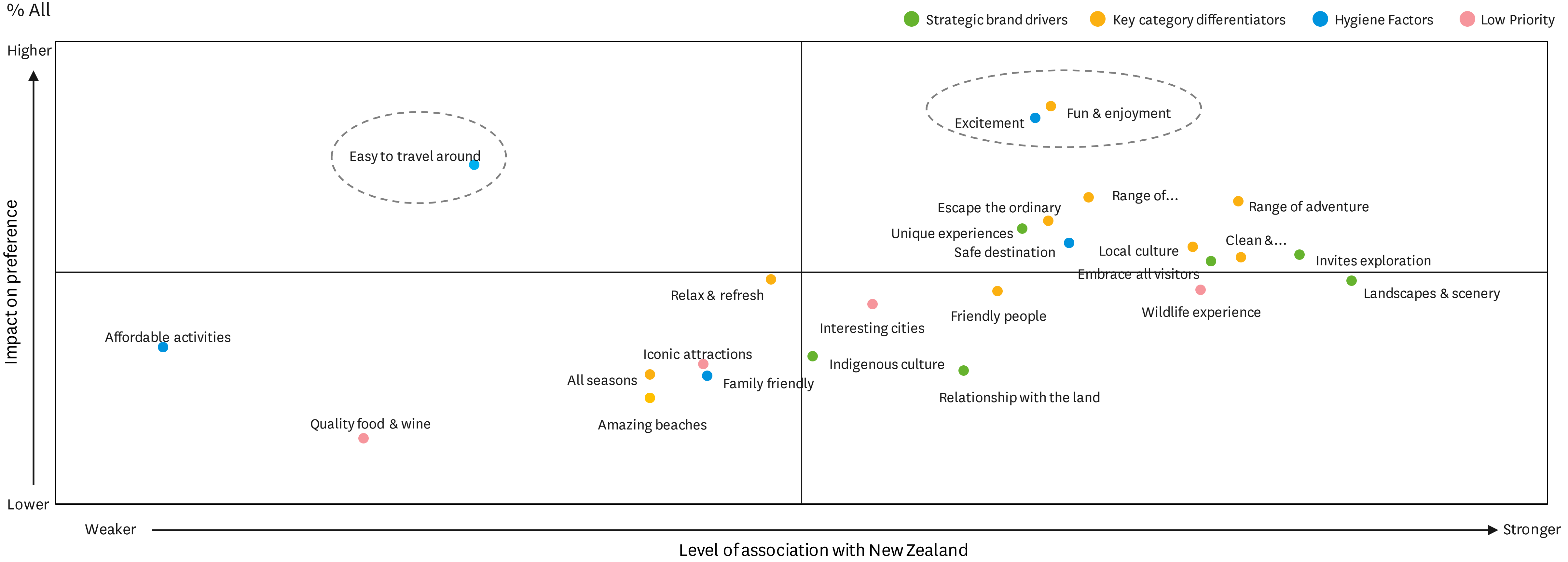
New Zealand as a destination performs well on its strategic drivers but boosting perceptions of New Zealand being easy to travel around and building the sense of fun and excitement should be a focus

Brand Associations of New Zealand x Impact on preference

% All



1. Sample size: n = 750
2. Question: "Which destinations, if any, do you associate with this statement?"
3. 'Affordable to fly to' driver not included due to low impact and level of association

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Relative to competitors, New Zealand performs well on its strategic drivers but there is an opportunity to build perceptions of several category differentiators, including the fun and enjoyment to be had, the range of experiences on offer and the local culture

Relative brand positioning for Strategic Brand Drivers and Key Category Differentiators

AC Monitor | Current 5MRA | Total Active Considerers (New Zealand and top five competitors) | Index (see appendix)

	Brand associations	New Zealand	Italy	Australia	France	United Kingdom	Hawaii
Strategic Brand Drivers	Unique experiences	101	105	91	105	96	95
	Invites exploration	103	97	109	94	86	92
	Embrace all visitors	102	95	89	114	99	96
	Landscapes & scenery	104	84	105	97	83	108
	Indigenous culture	110	84	101	90	87	88
	Relationship with the land	105	84	91	104	82	110
Key Category Differentiators	Fun & enjoyment	94	107	92	113	104	111
	Range of experiences	96	102	95	110	122	92
	Range of adventure	101	93	109	80	97	106
	Relax & refresh	101	101	87	96	80	119
	Escape the ordinary	102	101	95	96	91	101
	Local culture	98	110	95	106	103	93
	Clean & unpolluted	113	78	96	85	76	96
	Friendly people	102	103	100	80	101	95
	All seasons	98	95	100	94	92	121
	Amazing beaches	99	93	114	73	73	131

Actions for TNZ:

Strengths:

- Indigenous culture
- Relationship with the land
- Clean & unpolluted

Drivers to dial up:

- Fun & enjoyment
- Range of experiences
- Local culture

Relative weakness | 100 | *Relative strength*

Heat map shading is across rows, i.e. compares the six countries on that attribute

1. Sample size: n = 750
2. Question: "Which destinations, if any, do you associate with this statement?"

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New Zealand's performance across hygiene and low priority factors is relatively poor compared to other competitor destinations with the greatest need to boost perceptions of the higher impact drivers: excitement and easy to travel around

Relative brand positioning for Hygiene Factors and Low Priority

AC Monitor | Current 5MRA | Total Active Considerers (New Zealand and top five competitors) | Index (see appendix)

	Brand associations	New Zealand	Italy	Australia	France	United Kingdom	Hawaii
Hygiene Factors	Excitement	97	107	96	101	106	100
	Easy to travel around	93	109	95	110	115	103
	Safe destination	99	106	82	97	108	107
	Affordable activities	100	95	85	118	125	84
	Family friendly	95	107	87	100	109	115
	Affordable to fly to	100	104	58	104	132	107
Low Priority	Wildlife experience	118	54	139	69	69	77
	Interesting cities	94	123	94	106	133	74
	Iconic attractions	91	119	85	122	126	92
	Quality food & wine	90	133	92	131	99	87

Actions for TNZ:

Strengths:

- Wildlife experience

Drivers to dial up:

- Excitement
- Easy to travel around
- Family friendly

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1. Sample size: n = 750
2. Question: "Which destinations, if any, do you associate with this statement?"

Relative weakness | 100 | *Relative strength*

Heat map shading is across rows, i.e. compares the six countries on that attribute

NEW ZEALAND TOURISM

100% PURE NEW ZEALAND

Tactical communications should address growing knowledge gaps by guiding ACs to key information sources, such as newzealand.com, and providing options that highlight the ease of travelling around New Zealand

Top ten knowledge gaps

AC Monitor | Current 5MRA vs. Previous 6MRA | Total Active Considerers

	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	What the weather is like	41%	44%
2	Where I should get information about organising a holiday	35%	22%
3	How easy it is to travel around	34%	33%
4	How welcoming the locals are	34%	35%
5	The length of time required to fly to New Zealand	33%	42%
6	How safe it is from crime	32%	29%
7	The quality and variety of food and beverage options	31%	26%
8	What / where the recommended things to see and do are	29%	27%
9	How safe it is to participate in adventure activities	29%	26%
10	Driving on the left-hand side of the road	27%	23%

Ranks higher now than six months ago

Significantly higher / lower than six months prior at 95%

1. Sample size: Current 5MRA n = 450; Previous 6 months n = 450
2. Question " Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

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NEW ZEALAND TOURISM

100% PURE NEW ZEALAND

Tactical marcomms about key information sources and ease of travelling around need to be surfaced early in the AC journey as dreamers are just as likely to have these concerns as planners or those booking

Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5MRA | Total Active Considerers

	What do ACs want to know more about before choosing New Zealand?	Dreaming	Planning	Booking
1	What the weather is like	44%	47%	37%
2	Where I should get information about organising a holiday	34%	28%	37%
3	How easy it is to travel around	43%	48%	23% ▼
4	How welcoming the locals are	36%	29%	32%
5	The length of time required to fly to New Zealand	42%	36%	25%
6	How safe it is from crime	43%	37%	22%
7	The quality and variety of food and beverage options	32%	27%	31%
8	What / where the recommended things to see and do are	35%	27%	25%
9	How safe it is to participate in adventure activities	30%	13% ▼	30% ▲
10	Driving on the left-hand side of the road	27%	45% ▲	24% ▼

▲▼ *Significantly higher / lower than comparison group at 95%*

1. Sample size: Dreaming n = 217, Planning n = 47, Booking n = 186
2. Question " Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

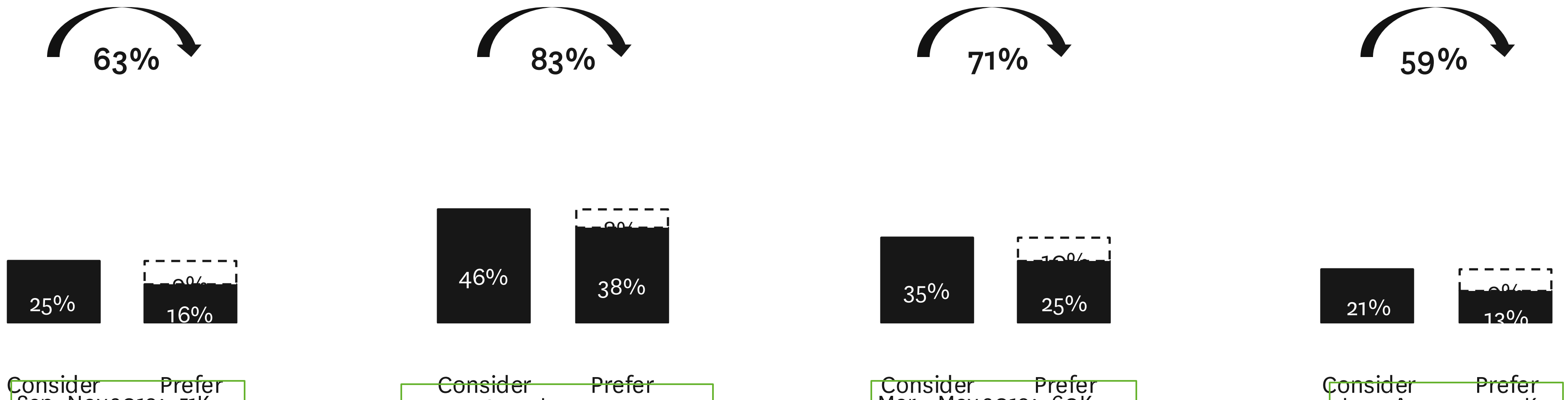
While preference to visit New Zealand is strongest for summer, there are opportunities for seasonal dispersal with autumn being the primary opportunity

Seasons – consideration & preference

AC Monitor | Current 5MRA | Total Active Considerers

Conversion of consideration to preference

Opportunity



Holiday Arrivals data	Sep- Nov 2019: 51K Sep- Nov 2023: 45K	Dec 2018 – Feb 2019: 102K Dec 2022 – Feb 2023: 73K	Mar – May 2019: 60K Mar – May 2023: 43K	Jun – Aug 2019: 27K Jun – Aug 2023: 38K
	Off-peak	Peak	Off-peak	Off-peak

1. Sample size: n = 750
2. Spring 'Off-peak' refers to the period Sep, Oct, Nov; 'Peak' refers to the period Dec, Jan, Feb; Autumn 'Off peak' refers to the period Mar, Apr, May; 'Off peak' refers to the period Jun, Jul, Aug
3. Stats NZ International Visitor Arrivals Dec 2018 – Nov 2019 and Dec 2022 – Feb 2023

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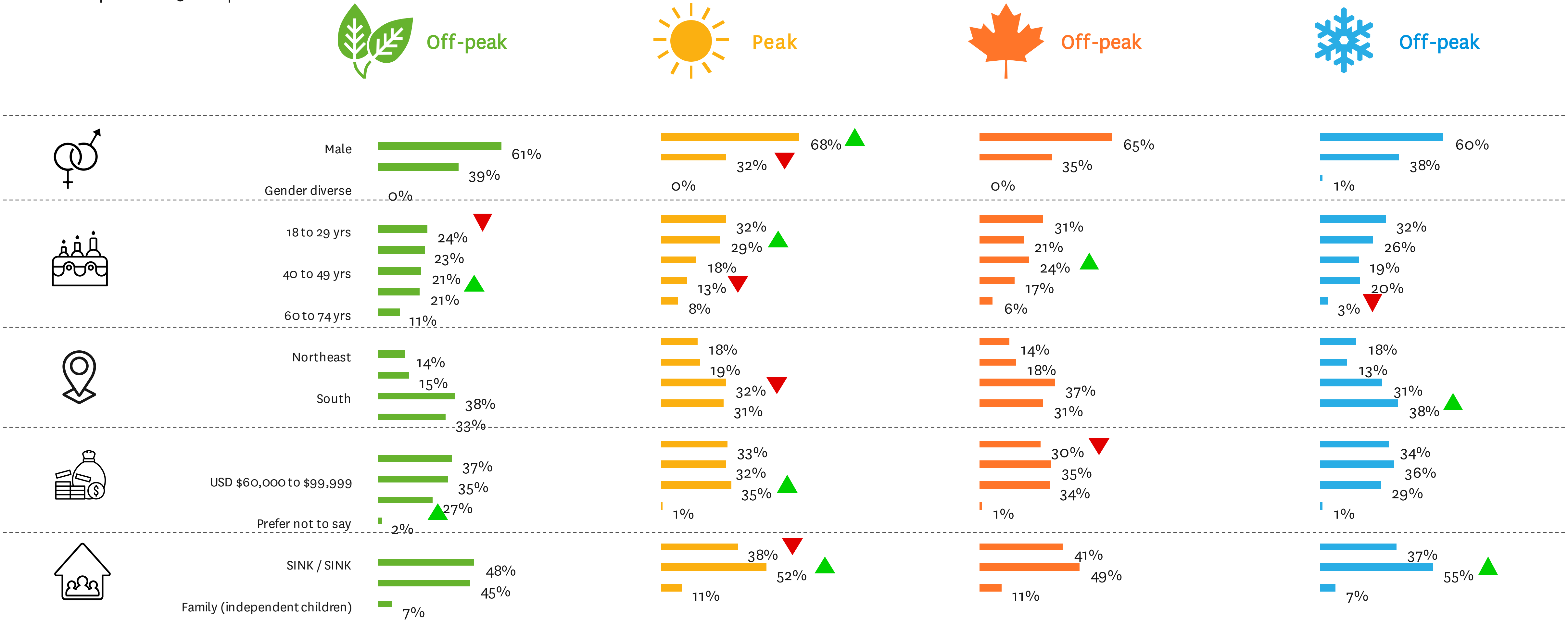
The demographic profile of shoulder season considerers skews towards those aged 40 – 59 yrs, while winter considerers skew towards families with dependent children and West USA

Profile of Seasonal Considerers

AC Monitor | Current 5MRA | Total Active Considerers



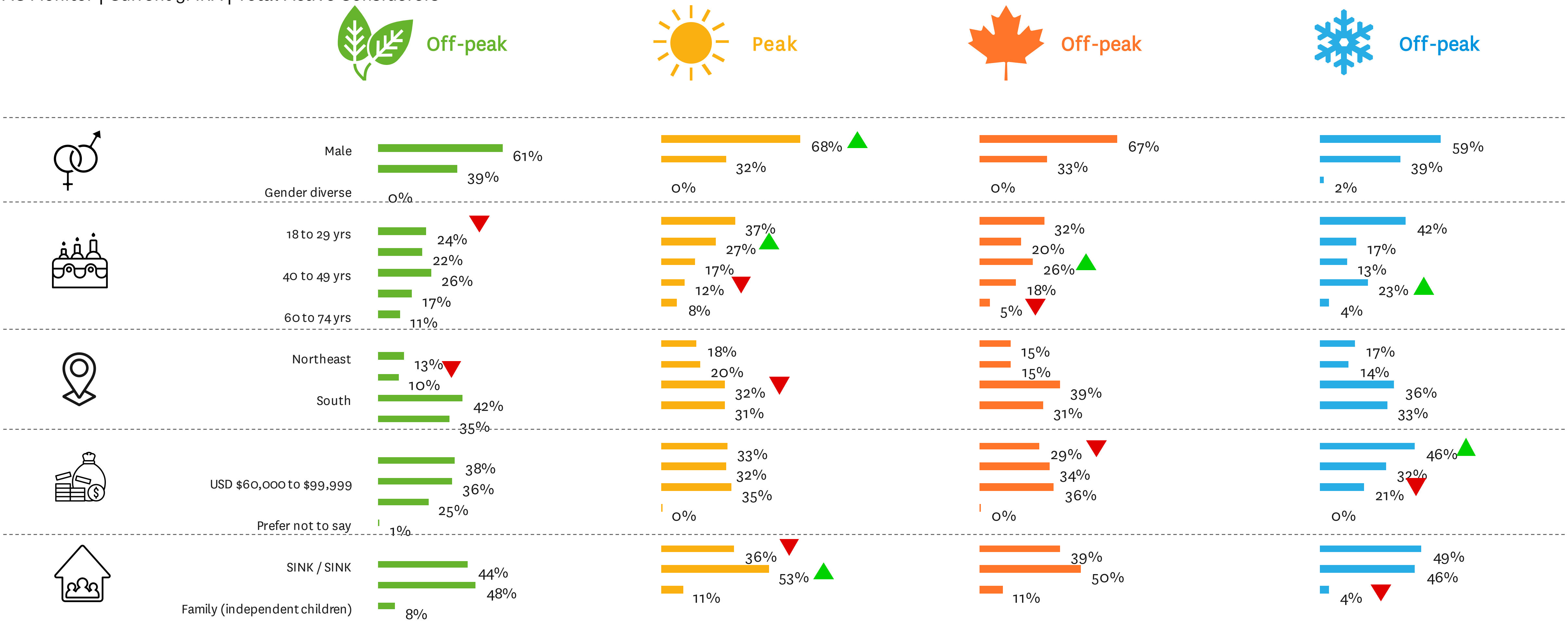
1. Sample sizes: Spring n = 2195 | Summer n = 340 | Autumn n = 251 | Winter n = 149

Significantly higher / lower than non-considerers of that season

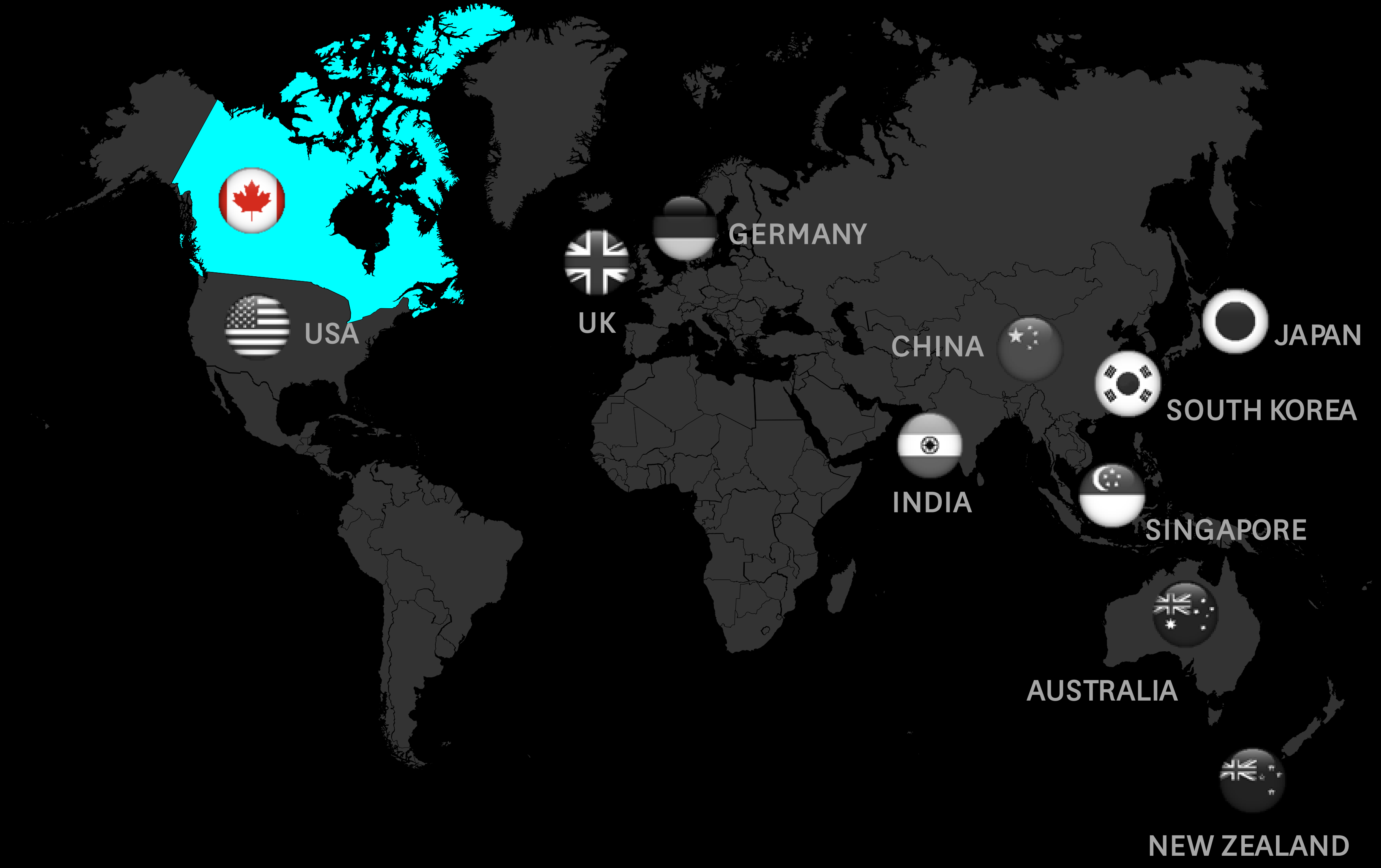
The demographic profile of winter preferers skews towards older ACs aged 50 – 59 yrs and those with lower household incomes while autumn preferers skew towards those aged 40 – 49 yrs

Profile of Seasonal Preferers

AC Monitor | Current 5MRA | Total Active Considerers



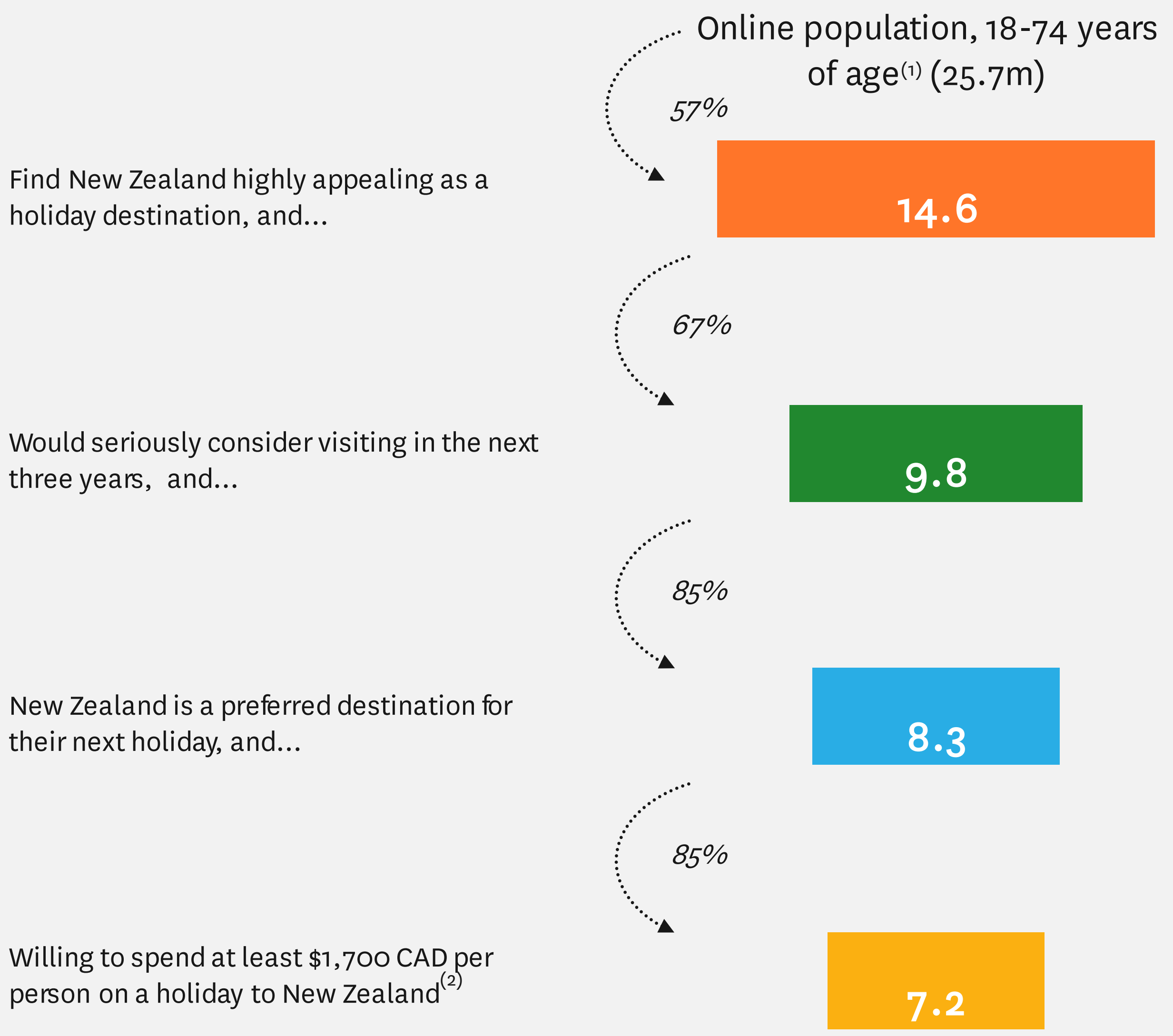
CANADA


GERMANY
UK
USA
CHINA
JAPAN
SOUTH KOREA
INDIA
SINGAPORE
AUSTRALIA
NEW ZEALAND

Active Considerer journey funnel – Canada

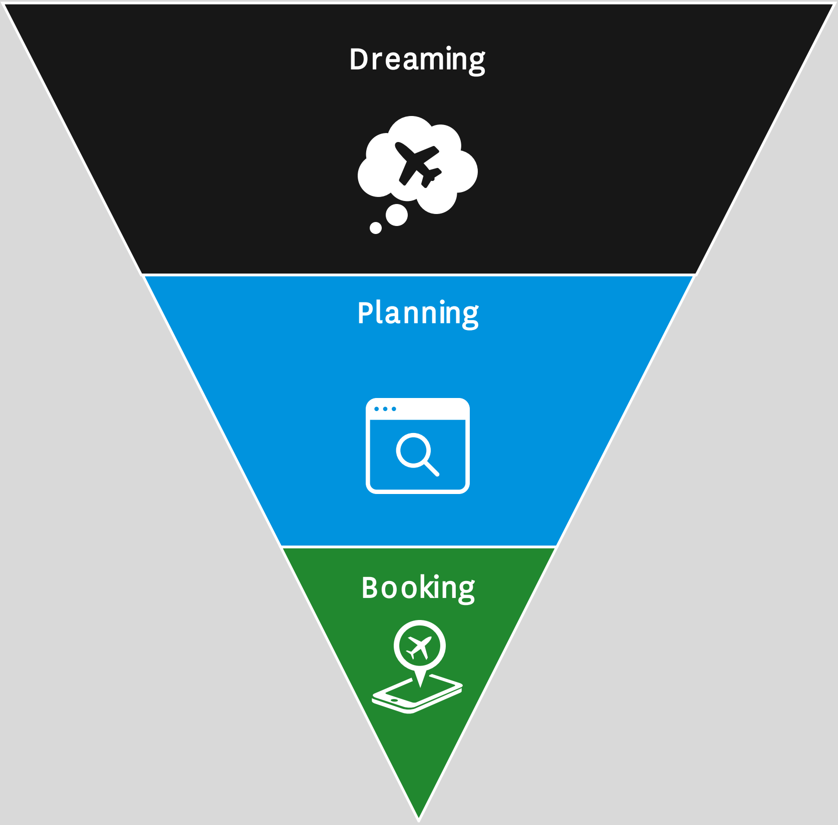
Active Considerers definition

Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation and have a realistic budget for their visit (C$1,700 per person on a holiday to New Zealand).



1. Including accommodation and daily expenses. Based off actual market data spend (IVS 2019)

Journey funnel to New Zealand – Canada



Size (%)

	Active Considerers (7.2m)	AC's	Priority Mindset Group
Dreaming	3.6	50%	51%
Planning	1.2	16%	22% ▲
Booking	2.4	34%	26% ▼

Comments

- 'Ready to book' is a claimed state of mind
- It doesn't mean ACs will book a flight tomorrow if possible to do so, but that the commitment to visit New Zealand is there, and they feel confident enough to consider it a place they'd book travel to
- A number of extrinsic (e.g. price, availability) and intrinsic (e.g. annual leave) factors need to align to make booking / conversion a reality
- We know that people continue researching and planning after reaching the 'ready to book' stage; it does not mean the end of engagement between consumers and TNZ / industry players

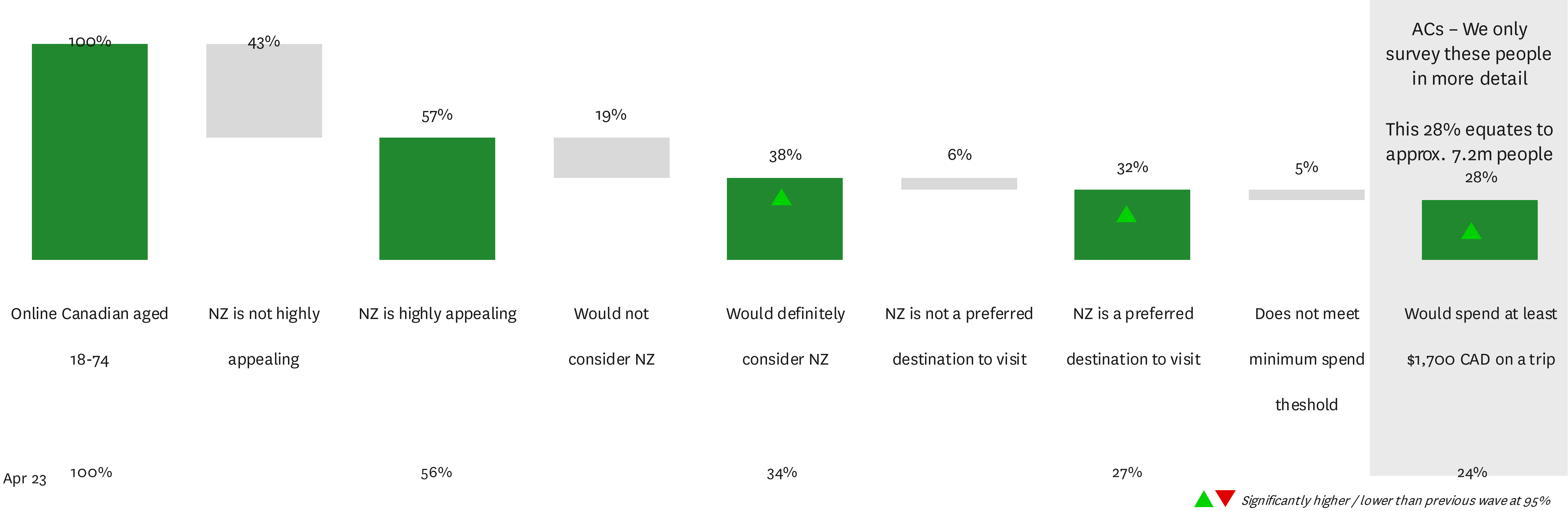
▲▼ *Significantly higher / lower than Non-Priority Mindset Group*

1. Sample sizes: Total ACs Oct 23 n = 300

The size of the opportunity in Canada is growing, with the AC incidence increasing to 28% (approximately 7.2 million people)

Qualifying criteria for defining ACs

AC Monitor | Oct 23 | % Online users aged 18-74



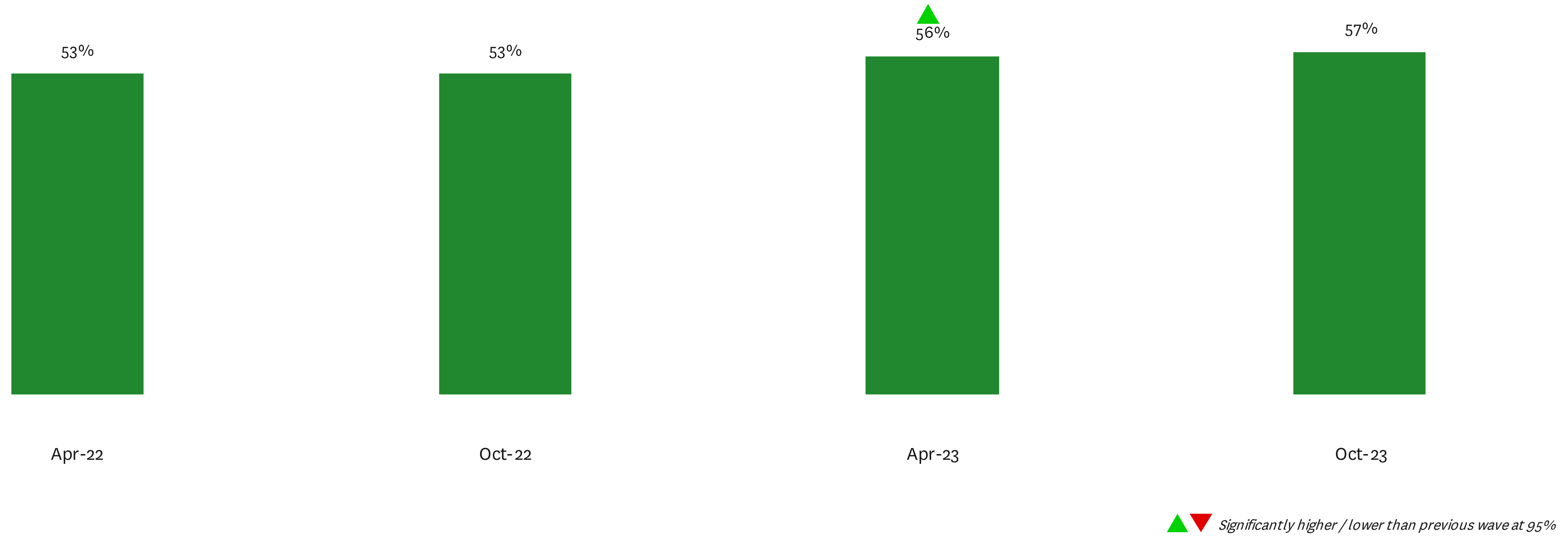
1. Sample sizes: Apr 23| Oct 23 n = 1,785 | 1,374

Appeal of New Zealand as a holiday destination is higher compared to the levels of a year ago

- Appeal is measured among the total online population aged 18 to 74 years old, and is the 'above the funnel' measure
- Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals
- Appeal is likely to be impacted by macro situation, scalable events (i.e., Rugby World Cup, NZ handling of Covid pandemic), and high impact earned mass-reach media TNZ efforts

Appeal

% Online users aged 18-74

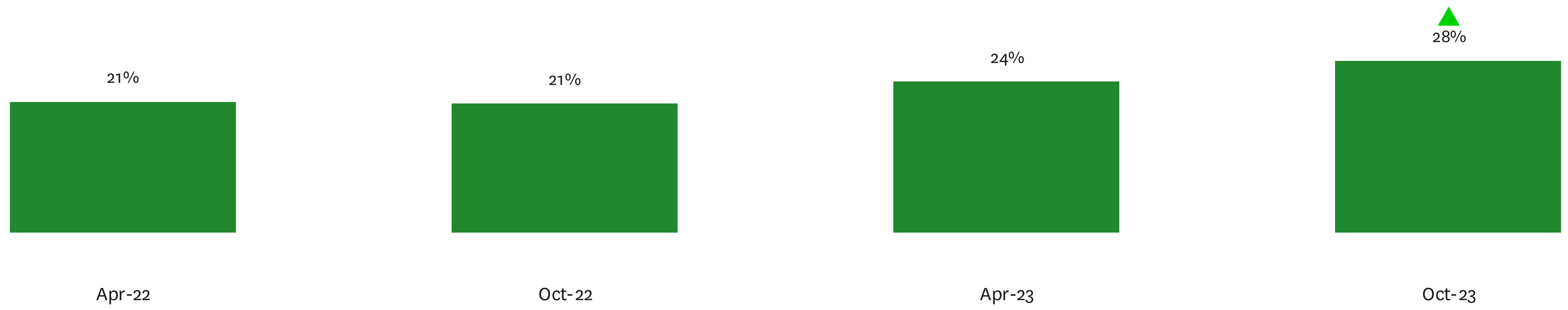


1.Sample size: Apr 22 n = 4,148 | Oct 22 n = 2,001 | Apr 23 n = 1,785 | Oct 23 n = 1,374
2.Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

The Canada market continues to grow, with a significant rise in AC incidence in the most recent period

Incidence of ACs

% Online users aged 18-74



Significantly higher / lower than previous wave at 95%

Sample sizes: Apr 22 n = 4,148 | Oct 22 n = 2,001 | Apr 23 n = 1,785 | Oct 23 n = 1,374

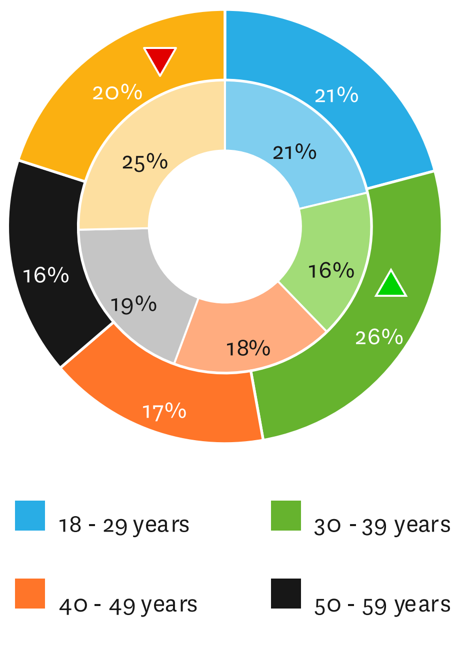
ACs are concentrated in Ontario and Quebec, with a greater proportion of 30-39 year olds making up the AC pool compared to non ACs; Canada's priority mindsets make up 46% of the AC pool

Profile of Active Considerer

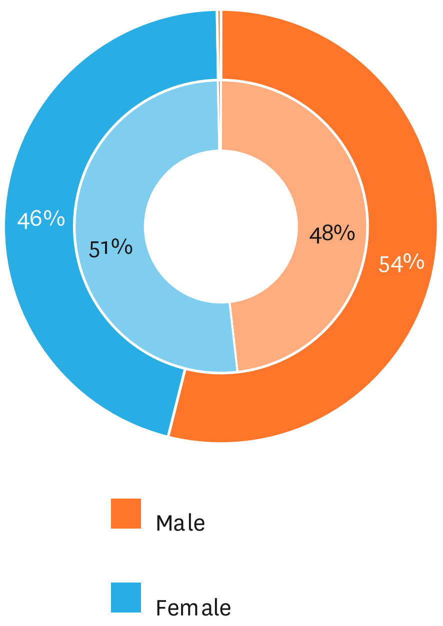
% Active Considerers vs Non-Active Considerers | Oct 23

Outer ring: Canada Active Considerers
Inner ring : Canada non-Active Considerers

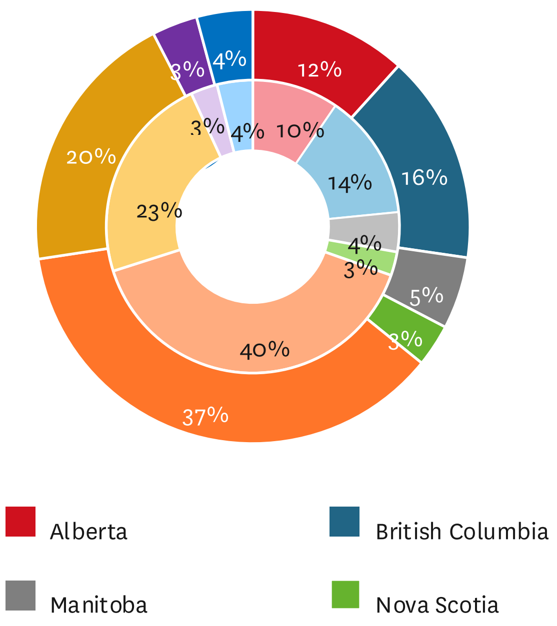
By age segment



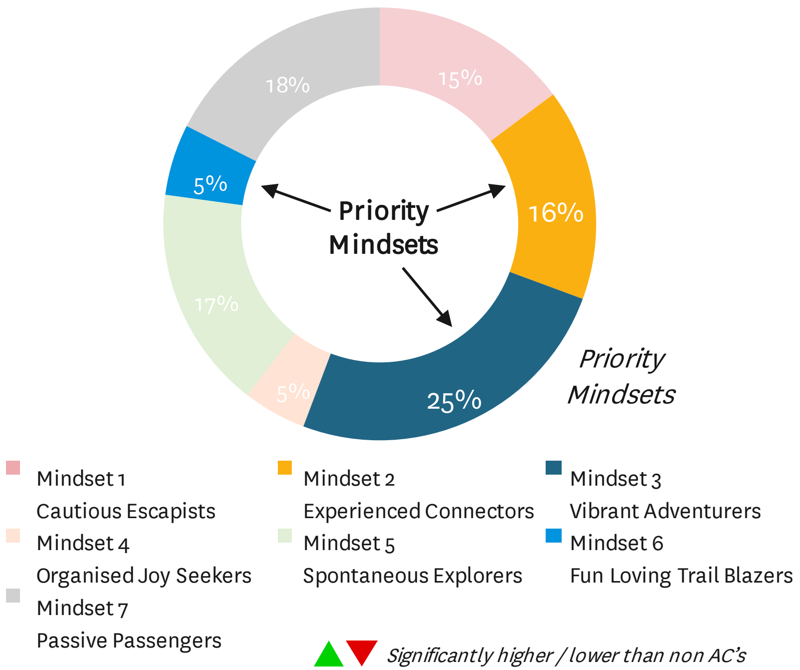
By gender



By region



Mindset Segments



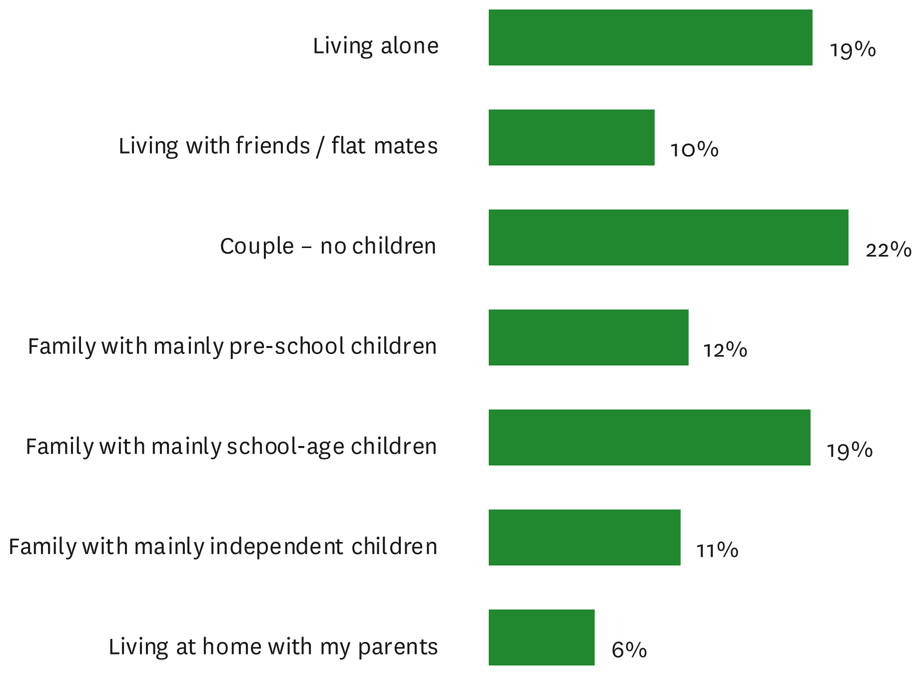
Significantly higher / lower than non AC's

1. Sample sizes: ACs n = 362 | Non ACs n = 1,009

The profile of Canadian ACs is broadly split between those with families and those without

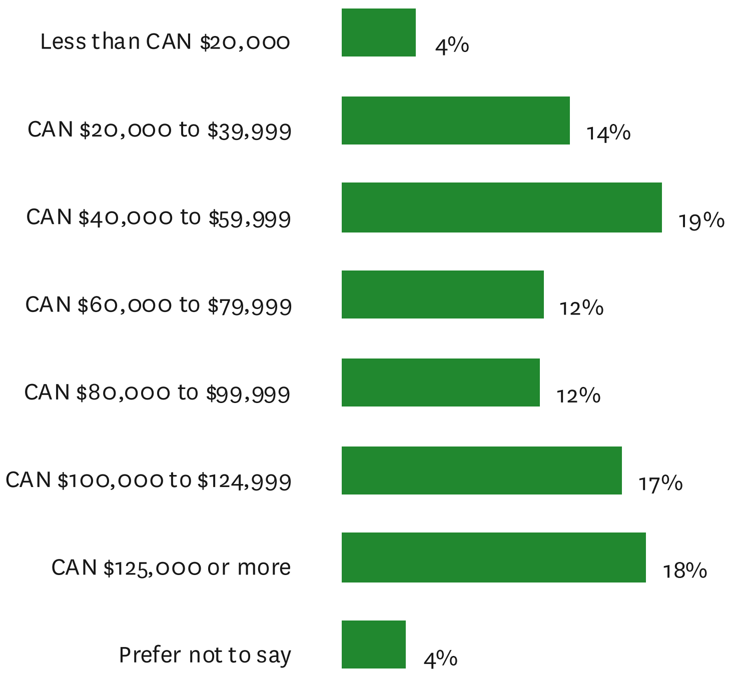
Household Composition

% Active Considerers | Oct 23



Household Income

% Active Considerers | Oct 23

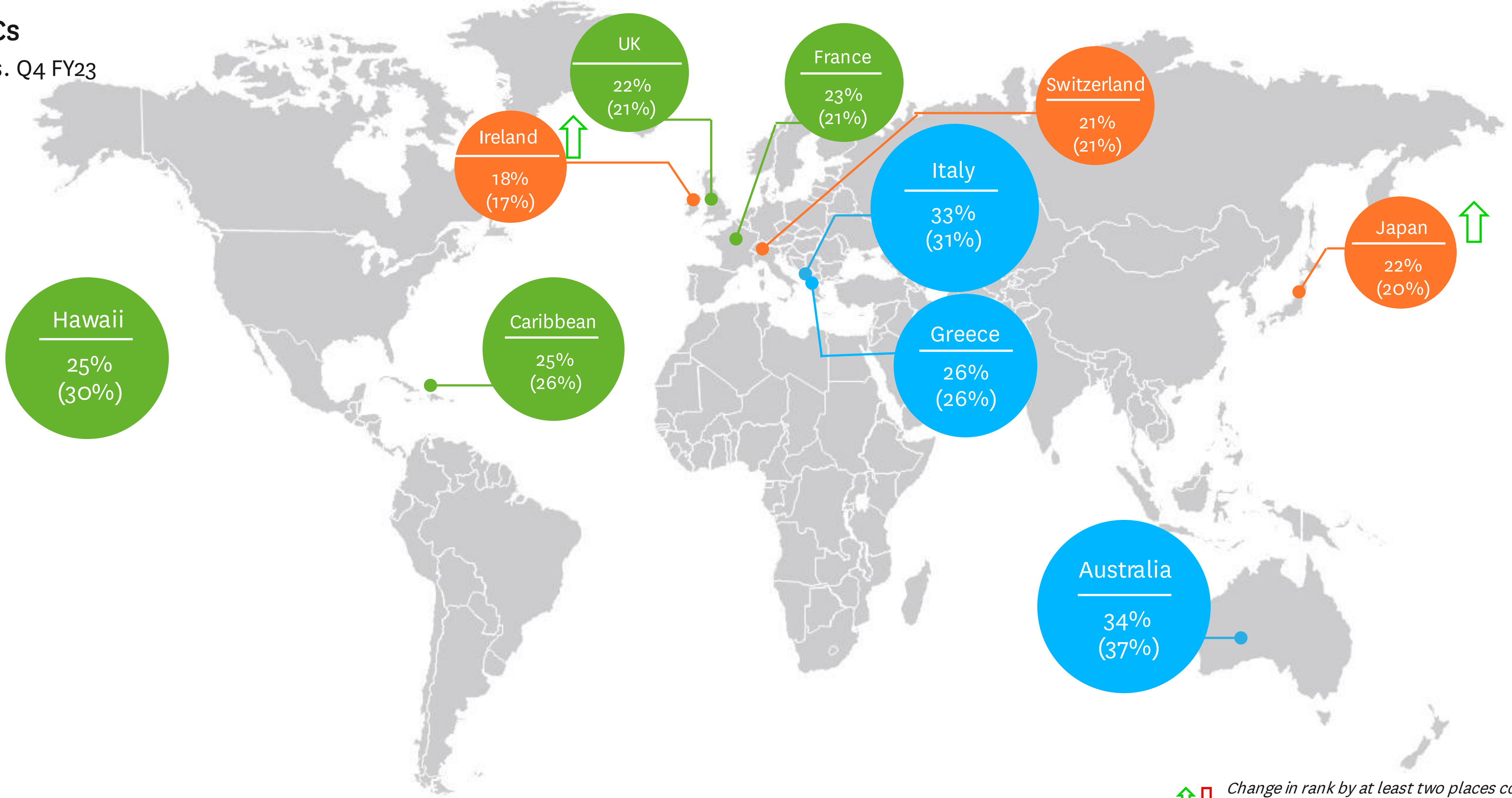


1. Sample size: n = 300
2. Q: "Which of these best describes your household?"
3. Q: "What is your total annual household income?"

Australia and Italy continue to be New Zealand's top competitors within the Canada market based on preference

Top ten competitor set for ACs

% Active Considerers | Q2 FY24 vs. Q4 FY23



Legend
- Top 3
- Rank 4-7
- Rank 8-10

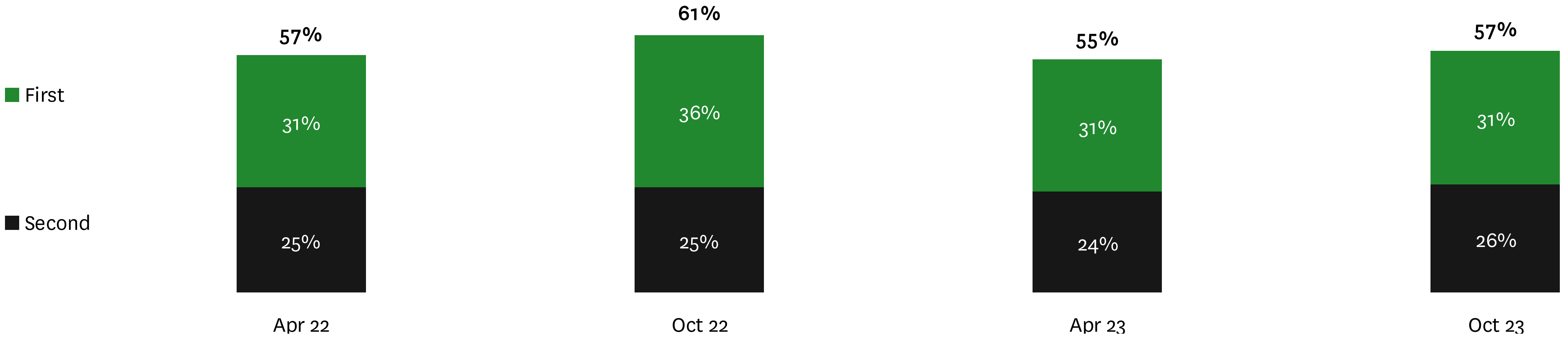
Change in rank by at least two places compared to 6 months ago

1. Sample size: Total ACs Oct 23 | Apr 23 n = 300 | 300
2. % selected destination in their top five preferred destinations
3. Figures in brackets denote previous 6 months
4. Question "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"

Levels of preference for New Zealand remain broadly stable over time among high quality visitors

New Zealand as a #1 Preferred Destination

% Active Considerers | Priority Mindsets



First preference scores:

	Apr 22	Oct 22	Apr 23	Oct 23
Priority Mindsets	29%	▲ 40%	34%	35%

▲▼ *Significantly higher / lower than previous wave at 95%*

1. Sample sizes: Total ACs Apr | Oct 22 | Apr23 | Oct23 n = 500 | 300 | 300 | 300; Priority Mindsets Apr | Oct 22 | Apr23 | Oct23 n = 218 | 142 | 141 | 140
2. Total % = ACs ranking New Zealand top two out of top five preferred destination to visit
3. Question “Can you please rank those destinations in order of preference where 1 is your most preferred destination?”

Context to preference drivers

Using Jaccard's analysis, we estimate which destination attributes drive preference for New Zealand and how New Zealand performs relative to its key competitors in order to identify priority attributes to focus on in each market

We typically do brand preference driver analysis once a year on key markets

The brand driver analysis included in this report is based on the most recent results available: Data from Jan-22 to Dec-22.

A framework to organise and optimise how we leverage our brand associations

Strategic Brand Drivers Depending on brand positioning, what are the areas can TNZ leverage that might have higher impact on consumer decision making and connection – Drivers of unique, distinct New Zealand	**Key Category Differentiators** What are the key category issues that TNZ can use to stand out and cut-through with ACs?
Low Priority Drivers New Zealand drivers that allow us to differentiate but are not core to "who we are", does not drive mental availability, emotional resonance	**Hygiene Factors** What are the hygiene factors in the travel industry. TNZs journey should start here – Before communicating how our positioning exceeds expectations, we need to demonstrate these hygiene factors are in place.

Categorising destination brand associations to the framework...

Strategic Brand Drivers

- Landscapes & Scenery
- Embraces all visitors
- Unique experiences
- Relationship with the land
- Indigenous culture
- Exploration

Key Category Differentiators

- Clean and unpolluted
- Relax and refresh
- Friendly people
- Range of adventure
- Range of experiences
- All seasons
- Local culture
- Fun & Enjoyment
- Escape the ordinary
- Amazing beaches

Low Priority Drivers

- Wildlife experiences
- Interesting cities
- Iconic attractions/landmarks
- Quality Food and wine

Hygiene Factors

- Safe destination
- Affordable to fly to
- Affordable activities
- Family Friendly
- Easy to travel around
- Excitement

Appendix: Brand attribute wording

Wording for the preference drivers

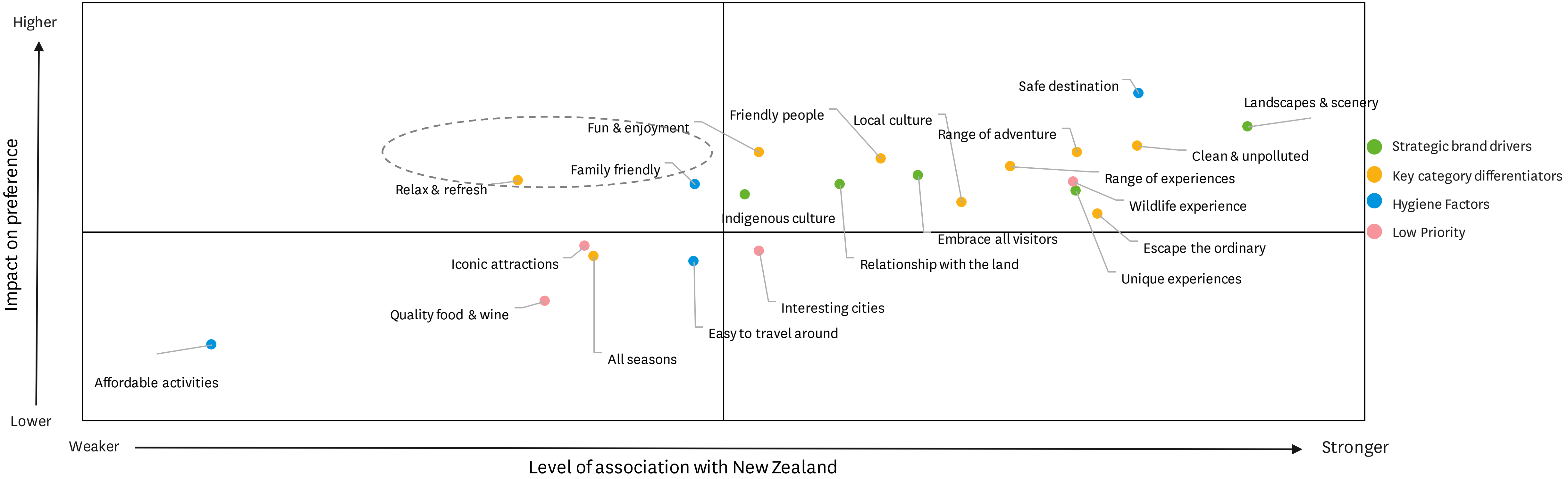
Shorthand	Full wording
Affordable activities	Things to see and do are affordable
Affordable to fly to	It's affordable to fly to this destination
All seasons	Suitable for a holiday all year round
Clean & unpolluted	The environment there is clean and unpolluted
Easy to travel around	It's easy to travel around to see and do things
Embraces all visitors	A destination that embraces visitors of all cultures
Escape the ordinary	A place you can escape from the ordinary
Excitement	Thinking about visiting makes me feel really excited
Exploration	A place that invites exploration and discovery
Family friendly	Ideal for a family holiday
Friendly people	The locals are friendly and welcoming
Fun & enjoyment	Ideal for having fun and enjoying yourself
Iconic attractions	Has iconic attractions and landmarks

Shorthand	Full wording
Indigenous culture	Has a unique indigenous culture
Interesting cities	Has interesting cities to visit
Landscapes & scenery	Spectacular natural landscapes and scenery
Local culture	Offers opportunities to experience local culture
Quality food & wine	Offers quality local food and wine experiences
Range of adventure	Offers a wide variety of outdoor & adventure activities
Range of experiences	Offers a wide variety of tourist experiences
Relationship with the land	A destination where the people have a special relationship with the land
Relax & refresh	Ideal to relax and refresh
Safe destination	I would feel safe travelling around this destination
Unique experiences	Offers experiences that you can't get anywhere else
Wildlife	Has amazing wildlife experiences

New Zealand as a destination displays strong associations with high impact drivers, including destination safety, cleanliness and spectacular landscapes and scenery; however, more could be done to drive a sense of relaxation, refreshment and family friendliness

Brand Associations of New Zealand x Impact on preference

% All markets



1. Sample size: n = 300
2. Question: "Which destinations, if any, do you associate with this statement?"
3. 'Affordable to fly to' driver not included due to low impact and level of association
4. 'Escape the ordinary' driver re-worded to 'A place you can escape from the ordinary in FY24'
5. 'Excitement', 'Amazing beaches' and 'Exploration' drivers added in FY24 and not included in impact analysis

New Zealand compares favourably to key competitors across TNZ's strategic brand drivers, particularly its unique culture and relationship with the land, but there is an opportunity to strengthen perceptions across several key category differentiators

Relative brand positioning for Strategic Brand Drivers and Key Category Differentiators

% Active Considerers | Q2 FY24 | Total (New Zealand and top five competitors) | Index (see appendix)

		New Zealand	Australia	Italy	Greece	Hawaii	Caribbean
Strategic Brand Drivers	Landscapes & scenery	104	99	91	98	106	80
	Embrace all visitors	101	92	103	96	91	115
	Relationship with the land	108	101	75	88	118	72
	Unique experiences	103	102	94	103	93	87
	Indigenous culture	118	125	29	49	120	80
	Invites exploration	99	111	90	109	96	89
Key Category Differentiators	Clean & unpolluted	121	94	60	71	89	90
	Fun & enjoyment	92	107	96	100	107	122
	Friendly people	102	93	103	89	105	96
	Range of adventure	99	106	82	91	116	105
	Range of experiences	95	102	102	102	98	115
	Relax & refresh	91	79	100	124	118	130
	Local culture	95	96	110	111	89	113
	Escape the ordinary	105	94	91	109	88	92
	All seasons	91	111	89	109	124	100
	Amazing beaches	86	108	81	110	128	138

Actions for TNZ:

Strengths:

- Clean & unpolluted
- Indigenous culture
- Relationship with the land

Drivers to dial up:

- Fun & enjoyment
- Relax & refresh
- All seasons
- Amazing beaches

Relative weakness | 100 | *Relative strength*

Heat map shading is across rows, i.e. compares the six countries on that attribute

1. Sample size: n = 300
2. Question: "Which destinations, if any, do you associate with this statement?"
3. 'Exploration' driver added in FY24 and not included in impact analysis

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New Zealand is perceived to be a safer and friendlier destination than its top competitors but is not as affordable as European destinations and Hawaii

Relative brand positioning for Hygiene Factors and Low Priority

% Active Considerers | Q2 FY24 | Total (New Zealand and top five competitors) | Index (see appendix)

		New Zealand	Australia	Italy	Greece	Hawaii	Caribbean
Hygiene Factors	Safe destination	109	96	93	93	94	74
	Family friendly	96	96	95	90	113	122
	Easy to travel around	99	101	110	99	93	92
	Affordable activities	98	78	110	123	84	121
	Affordable to fly to	87	75	105	125	107	163
	Excitement	101	97	87	114	103	90
Low Priority	Wildlife experience	122	136	50	48	68	79
	Iconic attractions	92	102	129	119	94	80
	Interesting cities	97	98	138	111	74	81
	Quality food & wine	92	94	151	111	82	86

Actions for TNZ:

Strengths:

- Safe destination
- Wildlife experience

Drivers to dial up:

- Affordable to fly to
- Iconic attractions
- Quality food & wine

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1. Sample size: n = 300
2. Question: "Which destinations, if any, do you associate with this statement?"
3. 'Excitement' and 'Amazing beaches' driver added in FY24 and not included in impact analysis

Relative weakness			100			*Relative strength*

Heat map shading is across rows, i.e. compares the six countries on that attribute

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

Tactical communications need to alleviate common concerns among ACs, such as length of flight to New Zealand, as well as growing concerns around the weather, how welcoming locals are and safety from crime

Top ten knowledge gaps

% Active Considerers | Over time

		Oct-23	Apr-23	Oct-22	Apr-22
1	Length of time required to fly to New Zealand	45%	39%	41%	42%
2	What the weather is like	▲ 44%	34%	36%	31%
3	How welcoming the locals are	▲ 36%	19%	22%	25%
4	How safe it is from crime	▲ 33%	23%	28%	26%
5	How easy it is to travel around	30%	▼ 24%	34%	31%
6	What / where the recommended things to see and do are	▲ 30%	20%	25%	21%
7	How long it takes to travel between the main attractions	27%	27%	24%	22%
8	Driving on the left-hand side of the road	27%	22%	24%	21%
9	Where I should get information about organising a holiday	26%	20%	22%	17%
10	The quality and variety of food and beverage options	26%	20%	19%	19%

Ranks higher now than six months ago

▲▼ *Significantly higher / lower than previous wave at 95%*

1. Sample size: Apr 22 n = 500 Oct 22 n = 300 Apr 23 n = 300 Oct 23 n = 300
2. Question "Putting thoughts aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Knowledge gaps vary by funnel stage so targeted messaging is needed to move ACs through the funnel: messages around how welcoming the locals are will be the most impactful among Dreamers whereas messages around the weather will have greater impact on those booking than planning

Top ten knowledge gaps, by funnel stage

% Active Considerers | Q2 FY24

	What do ACs want to know more about before choosing New Zealand?	Dreaming	Planning	Booking
1	The length of time required to fly to New Zealand	49%	49%	37%
2	What the weather is like	43%	36%	49%
3	How welcoming the locals are	39%	32%	33%
4	How safe it is from crime	33%	32%	34%
5	How easy it is to travel around	34%	28%	26%
6	What / where the recommended things to see and do are	28%	34%	31%
7	How long it takes to travel between the main attractions	23%	27%	34%
8	Driving on the left-hand side of the road	28%	36%	21%
9	Where I should get information about organising a holiday	28%	21%	27%
10	The quality and variety of food and beverage options	26%	19%	29%

Ranks higher now than six months ago

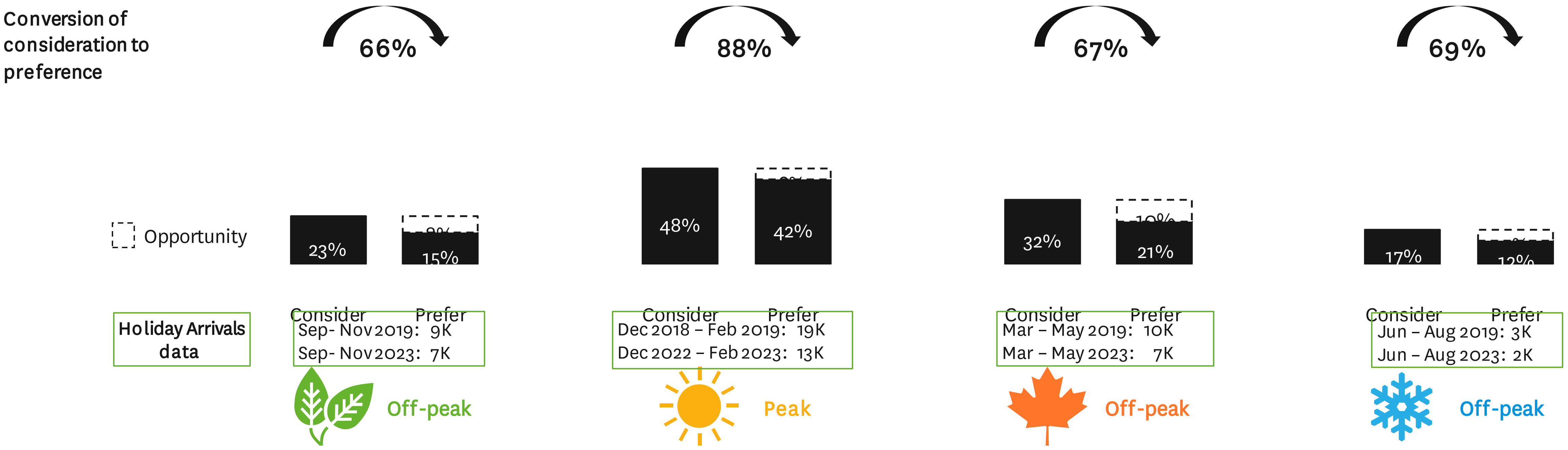
Significantly higher / lower than comparison group at 95%

1. Sample size Dreaming n = 159, Planning n = 48, Booking n = 93
2. Question "Putting thoughts aside about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Autumn offers the greatest opportunity to drive arrivals non-peak arrivals, but preference is strongest for summer

Seasons – consideration & preference

% Active Considerers | Q2 FY24



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1. Sample size Oct 23 n = 300
2. Spring 'Off-peak' refers to the period Sep, Oct, Nov; 'Peak' refers to the period Dec, Jan, Feb; Autumn 'Off-peak' refers to the period Mar, Apr, May; 'Off peak' refers to the period Jun, Jul, Aug
3. Stats NZ International Visitor Arrivals Dec 2018 – Nov 2019 and Dec 2022 – Feb 2023

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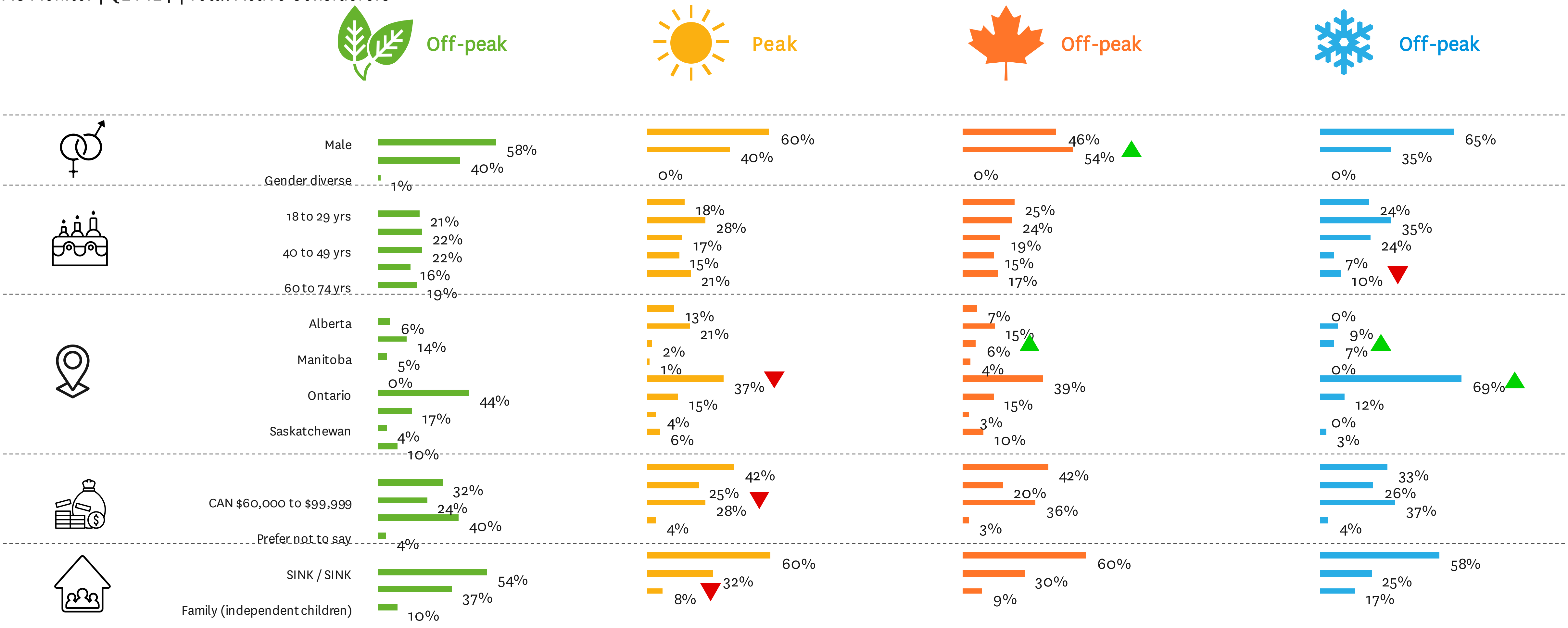
The demographic profile of considerers of each season is broadly similar although autumn considerers skew towards females and there is some regional variation

Profile of Seasonal Considerers

AC Monitor | Q2 FY24 | Total Active Considerers



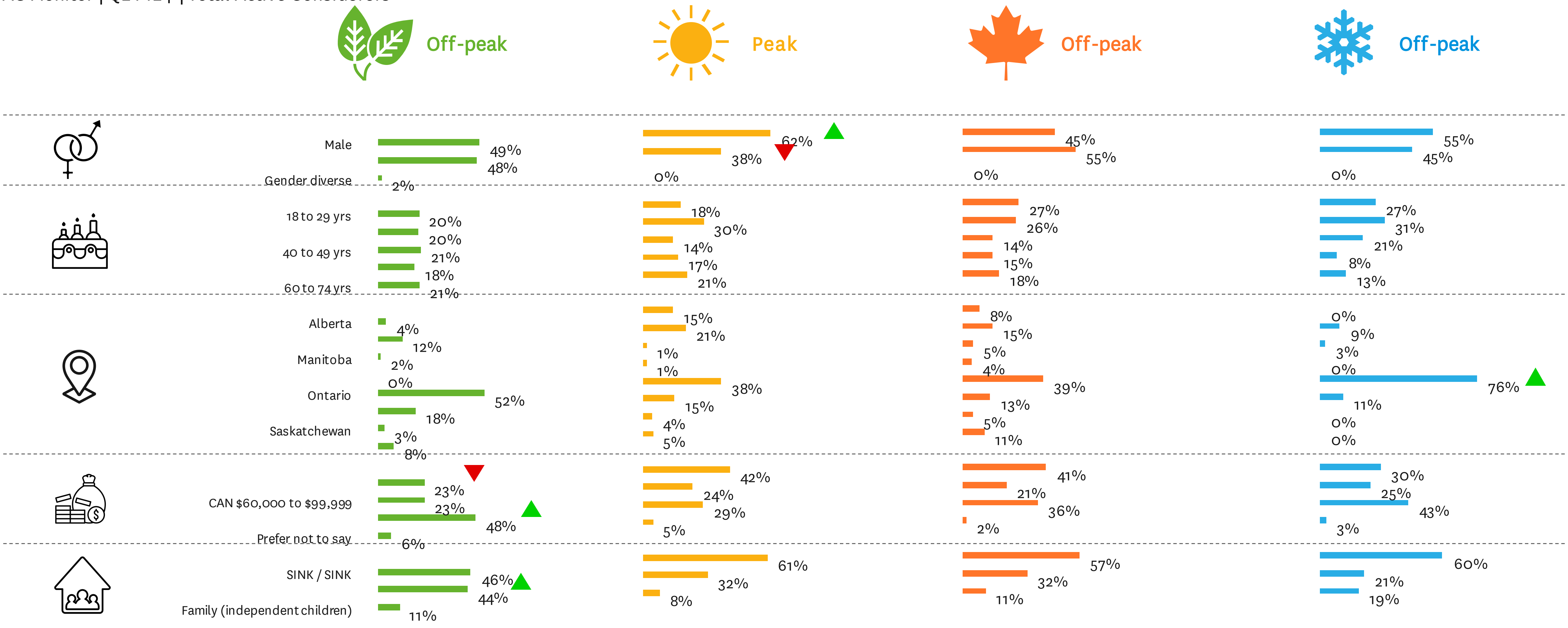
1. Sample sizes: Spring n = 71 | Summer n = 142 | Autumn n = 96 | Winter n = 46

Significantly higher / lower than non-considerers of that season

The demographic profile of summer preferers skews towards males while the profile of Autumn preferers skews towards higher income households and families with dependent children

Profile of Seasonal Preferers

AC Monitor | Q2 FY24 | Total Active Considerers



1. Sample sizes: Spring n = 47 | Summer n = 124 | Autumn n = 64 | Winter n = 32

Significantly higher / lower than non-preferers of that season

1 Appendix

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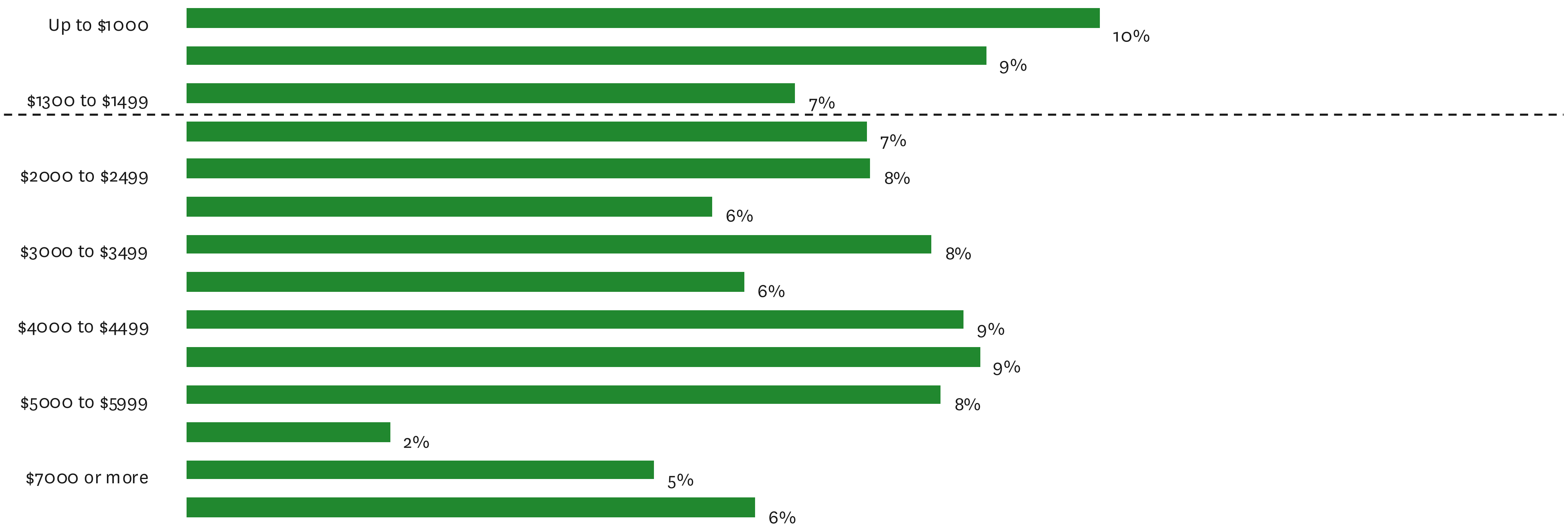
Among those in the USA who agree that New Zealand is a preferred holiday destination, 26% do not meet the current spend threshold of $1,500 USD

USA

Spend on holiday in New Zealand

% Those who agree NZ is a preferred holiday destination | Current 5MRA



Notes:
Sample sizes: n = 1226
Q "On a per person basis, how much would you be willing to spend on a holiday to New Zealand? Please include accommodation and daily expenses but do not include flights"

Compared to those who do not find New Zealand appealing, those who do are more likely to be aged 18-29 or 40-49 years, male and reside in the West

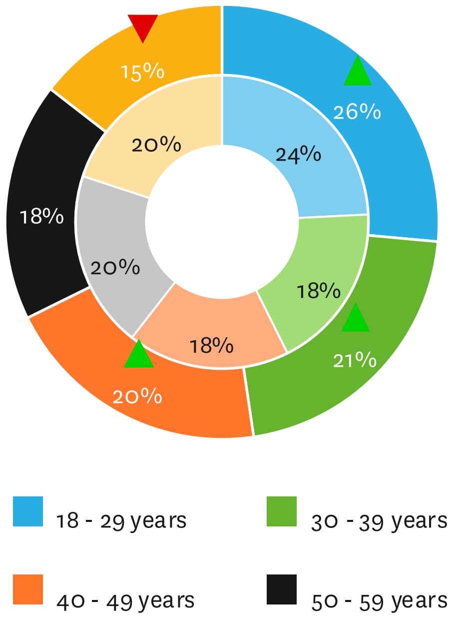
USA

Profile of those who find New Zealand appealing

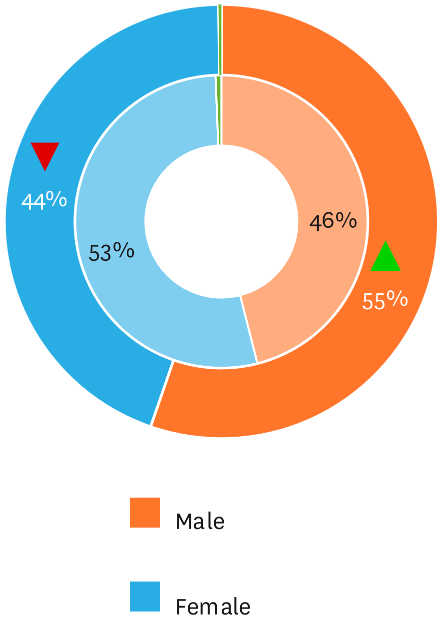
AC Monitor | Current 5MRA | Those who find New Zealand appealing vs. not

Outer ring: Those who find NZ appealing
Inner ring : Those who do not find New Zealand appealing

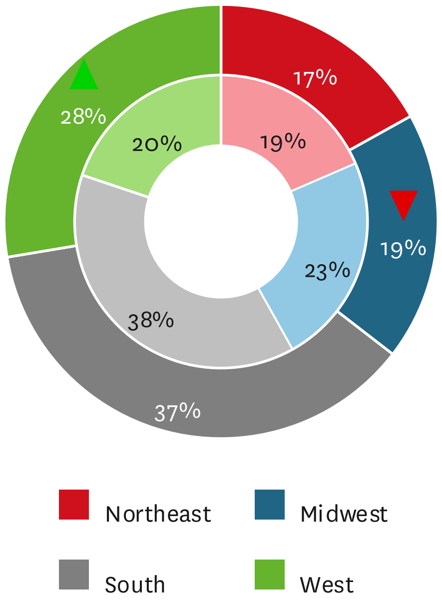
By age segment



By gender



By region



Significantly higher / lower than those who do not find New Zealand appealing

1. Sample sizes: Those who find New Zealand appealing n = 2807 | Those who do not find New Zealand appealing n = 3,462

KANTAR

100% PURE NEW ZEALAND

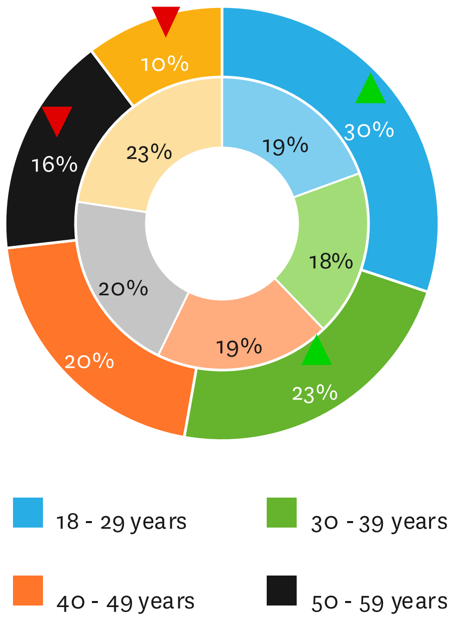
Compared to non-considerers of New Zealand, serious considerers are more likely to be aged 18 - 39 years or 40-49 years and male

USA

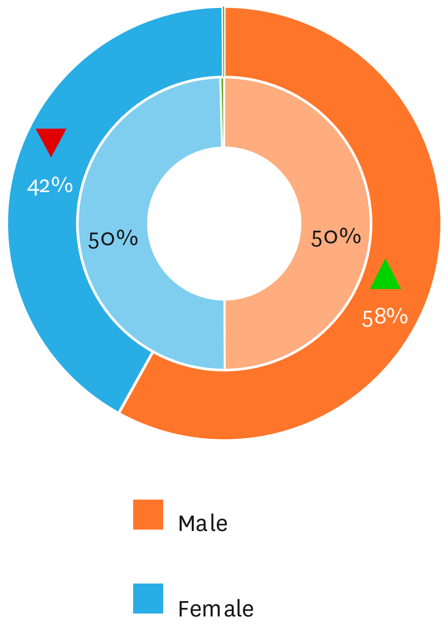
Profile of those who would seriously consider visiting New Zealand
AC Monitor | Current 5MRA| Those who would seriously consider vs. not

Outer ring: Those who would seriously consider visiting New Zealand
Inner ring : Those who would not seriously consider

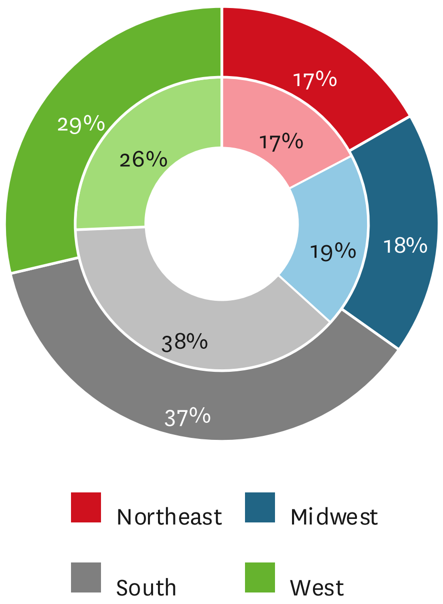
By age segment



By gender



By region



Significantly higher / lower than those who would not seriously consider

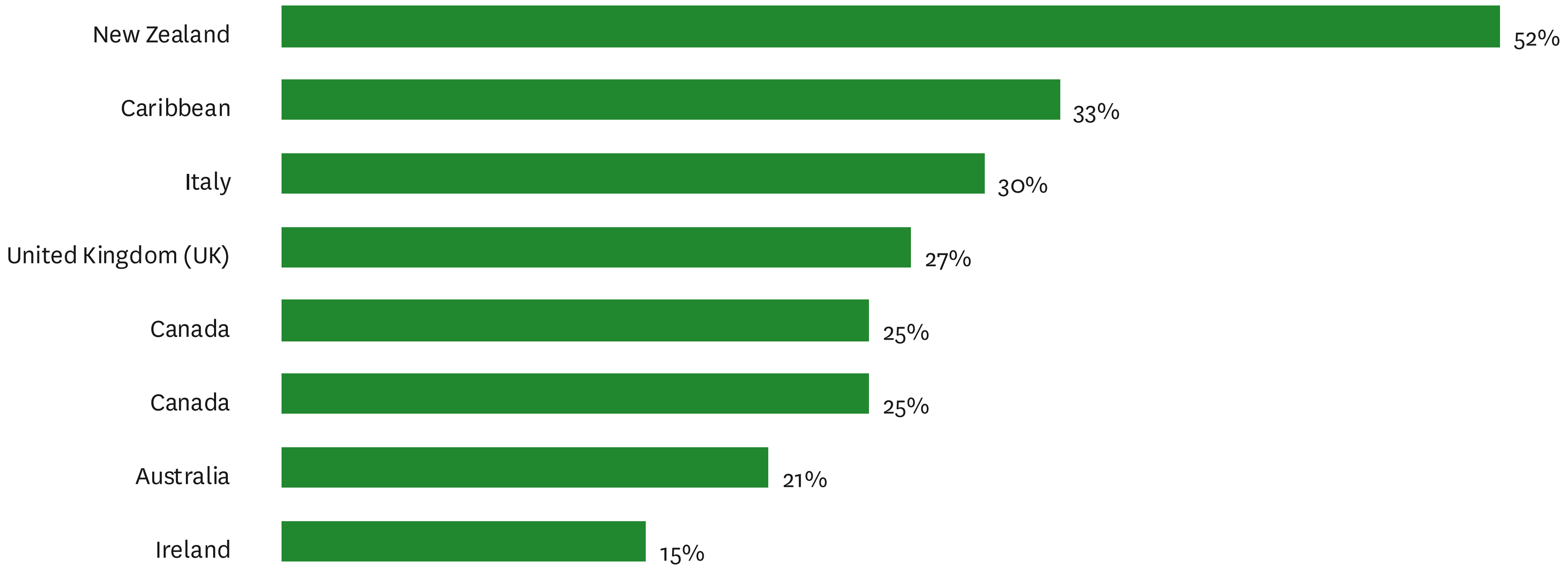
1. Sample sizes: Those who would seriously consider visiting New Zealand n = 1627 | Those who would not seriously consider visiting New Zealand n = 1180

New Zealand is, by far, the most prominent holiday destination recalled from any recent advertising or promotional activity

USA

Holiday destinations seen advertised or promoted recently (Prompted Awareness)

AC Monitor | Current 5MRA | Total Active Considerers



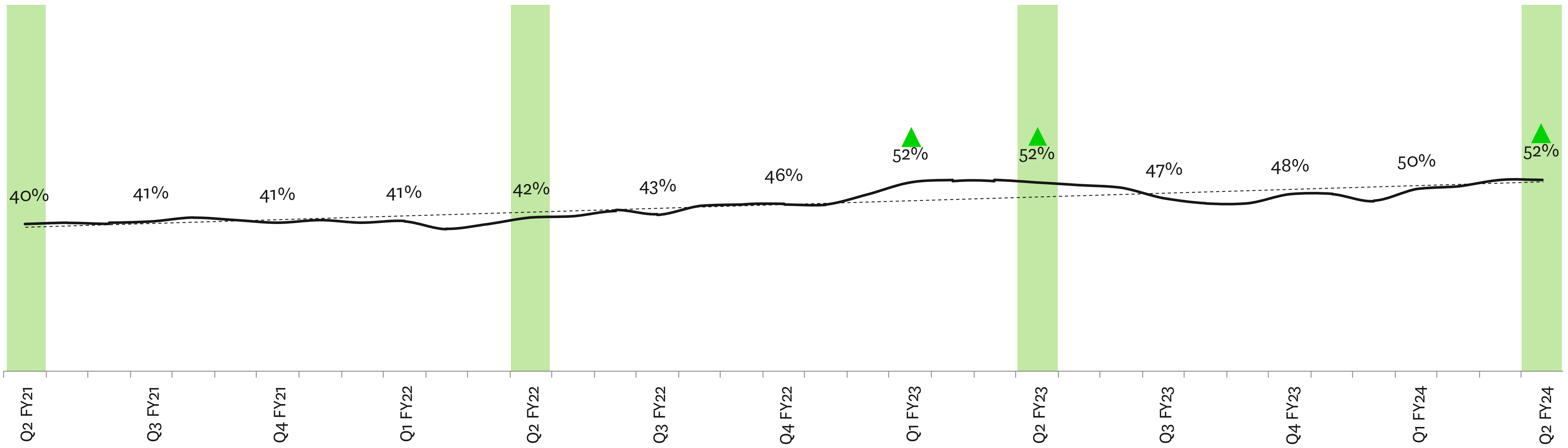
1. Sample sizes: n = 750
2. Q "Which of these holiday destinations have you seen advertised or promoted recently?"

Prompted awareness for New Zealand has increased in the latest quarter with a long-term upward trend

USA

Seen New Zealand advertised or promoted recently (Prompted Awareness)

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six month prior at 99%

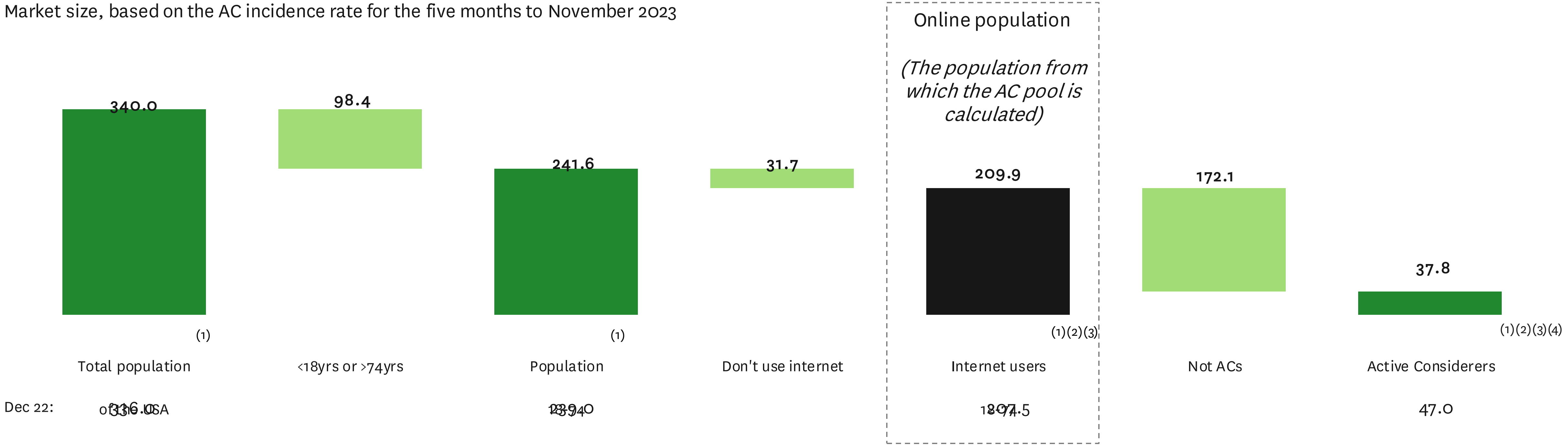
1. Sample size: Q2FY 21 - Q2 FY24 (6MRA) n = 459, 1059, 1050, 900, 899, 899, 899, 899, 900, 900, 900, 900, 900
2. Q "Which of these holiday destinations have you seen advertised or promoted recently?"

USA Market Sizing

USA

Nov 23 | Million people

Market size, based on the AC incidence rate for the five months to November 2023



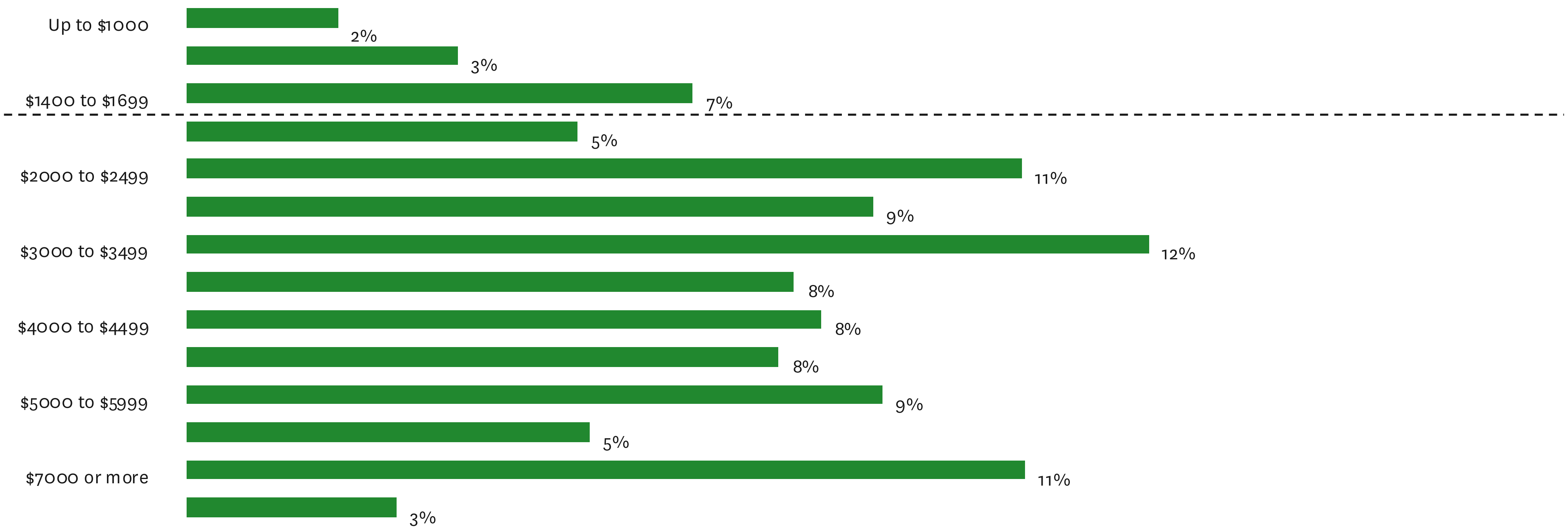
SOURCES/NOTES:
(1) US Census Bureau, Annual Estimates of the Civilian Population by Single Year of Age and Sex for the United States and States; Time period ending: July 2023; Coverage: Civilian population
(2) Worldometer population clock, USA; Time period as at mid January 2024
(3) Kantar Population Profiler, Internet usage by age; Time period: 2020
(4) Tourism New Zealand, Active Considerer Monitor Australia; Time period: Jul-Nov 2023, under the latest AC definition
(5) Kantar Analysis

Amongst Canadians who agree that New Zealand is a preferred holiday destination, 12% do not meet the current spend threshold of $1,700 CAD

CANADA

Anticipated spend on holiday in New Zealand

% Those who agree NZ is a preferred holiday destination | Q2 FY24



KANTAR

Notes:
Sample sizes: n = 425
Q "On a per person basis, how much would you be willing to spend on a holiday to New Zealand? Please include accommodation and daily expenses but do not include flights"

100% PURE NEW ZEALAND

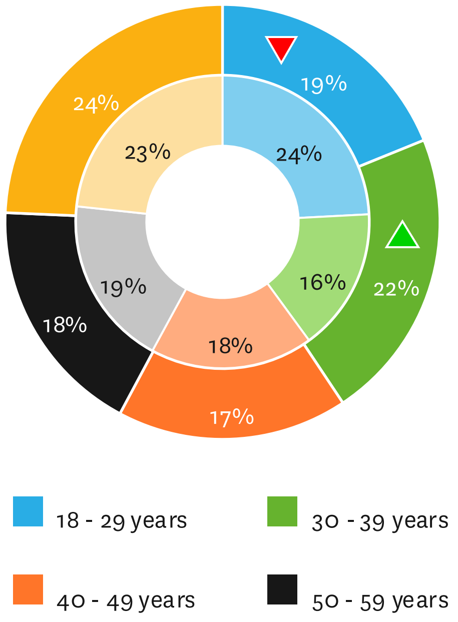
Compared to those who don't find New Zealand appealing, the profile of those who do is skewed more towards those aged between 30-39 years

CANADA

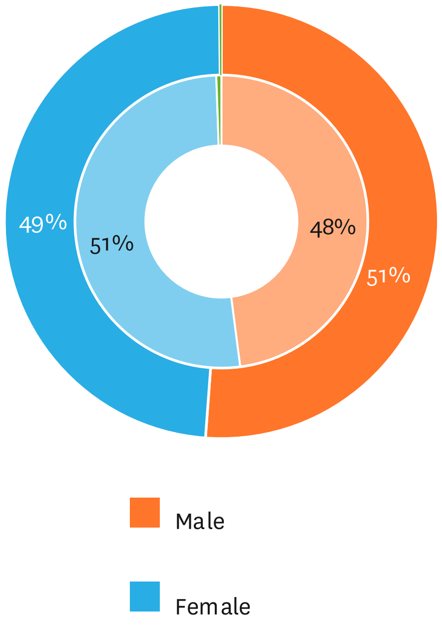
Profile of those who find New Zealand appealing
Those who find New Zealand appealing vs. not | Q2 FY24

Outer ring: Those who find NZ appealing
Inner ring : Those who do not find New Zealand appealing

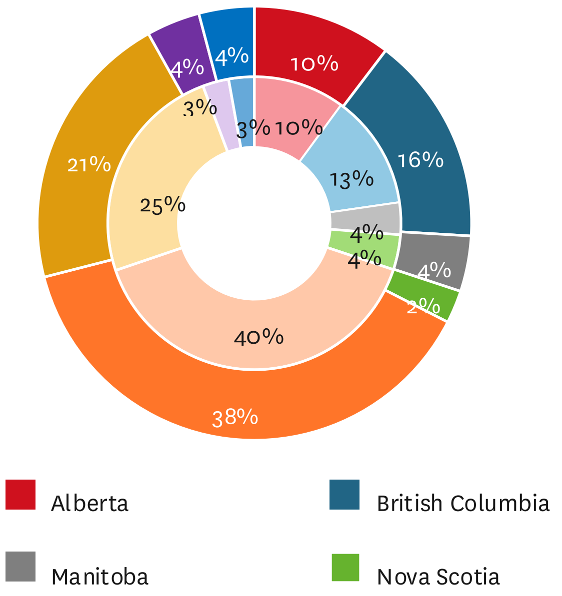
By age segment



By gender



By region



Significantly higher / lower than those who do not find New Zealand appealing

1.Sample sizes: Those who find New Zealand appealing n = 771 | Those who do not find New Zealand appealing n = 600

Compared to non-considerers, the profile of serious considerers in Canada is skewed more towards those aged between 18-40 years and residing in Ontario

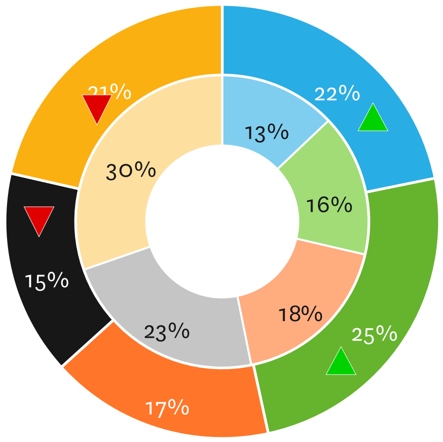
CANADA

Profile of those who would seriously consider visiting New Zealand

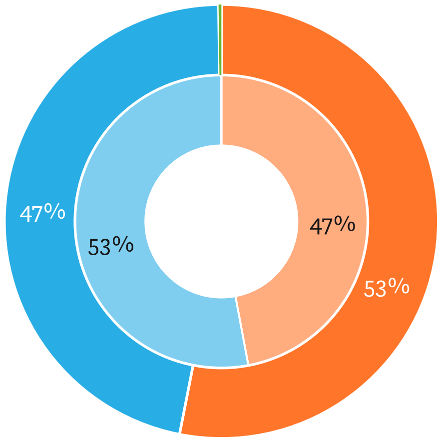
Those who would seriously consider vs. not | Q2 FY24

Outer ring: Those who would seriously consider visiting New Zealand
Inner ring : Those who would not seriously consider

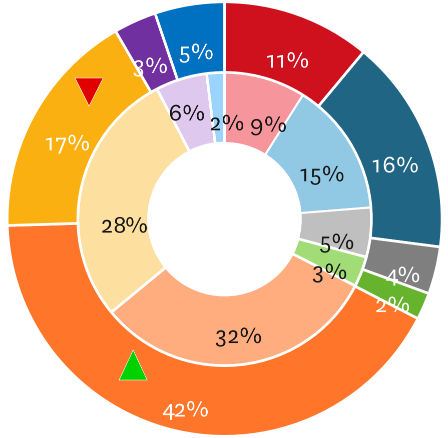
By age segment



By gender



By region



Significantly higher / lower than those who would not seriously consider

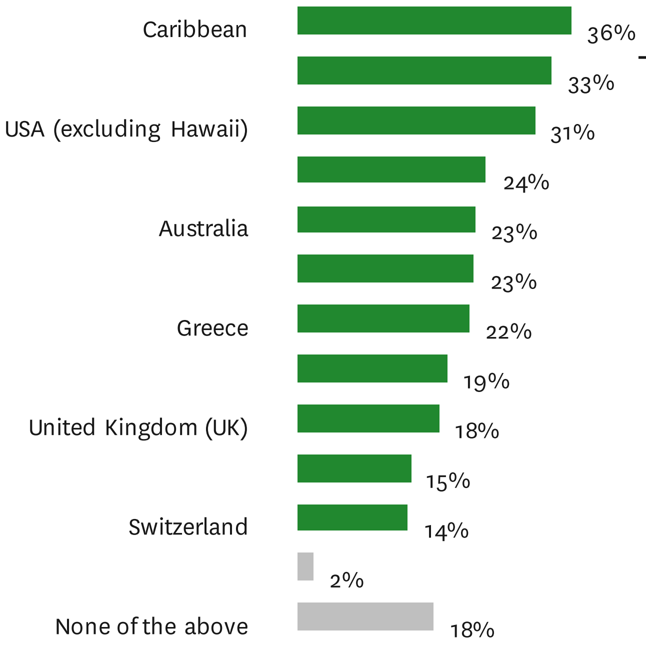
1.Sample sizes: Those who would seriously consider visiting New Zealand n = 506 | Those who would not seriously consider visiting New Zealand n = 264

Destination New Zealand advertising has comparable levels of memorability to its top competitors; recall is strongest on social media, followed by TV and other sources on the internet

CANADA

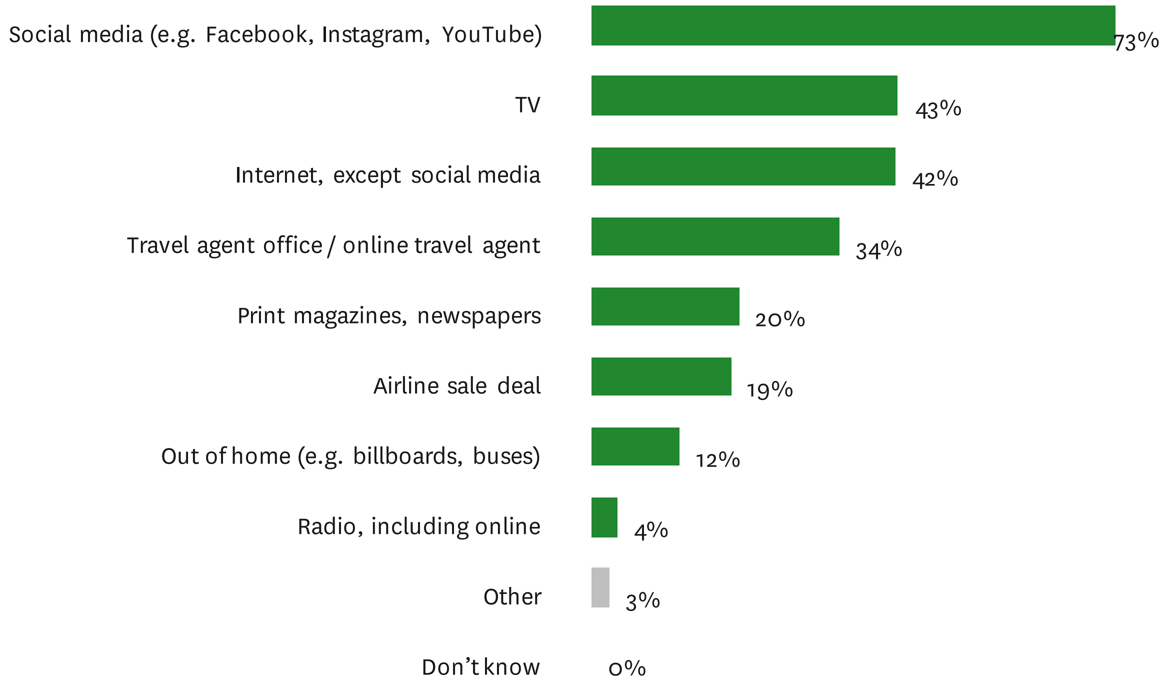
Holiday destinations seen advertised recently (prompted awareness)

% Active Considerers | Q2 FY24



Channels recalled seeing New Zealand content (prompted awareness)

% Those who recall seeing New Zealand content | Oct 23



KANTAR

1. Sample size: Prompted Awareness n = 300 | Prompted Awareness NZ n = 91
2. Q "Which of these holiday destinations have you seen advertised or promoted recently?"
3. Q "You mentioned that you have seen some advertisements or content prompting New Zealand. Where have you seen these?"

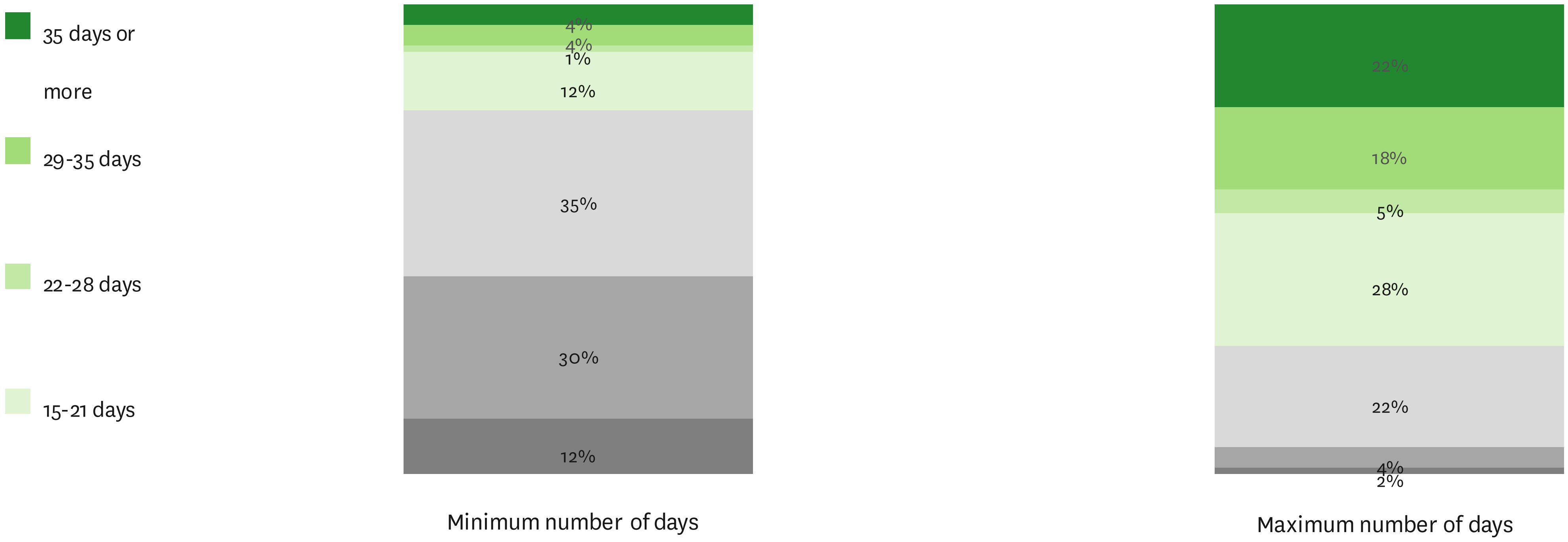
100% PURE NEW ZEALAND

The ideal number of holiday days to spend in New Zealand ranges from 1 week to 1 month

CANADA

Ideal minimum and maximum numbers of days spent on holiday in New Zealand

% Active Considerers | Q2 FY24

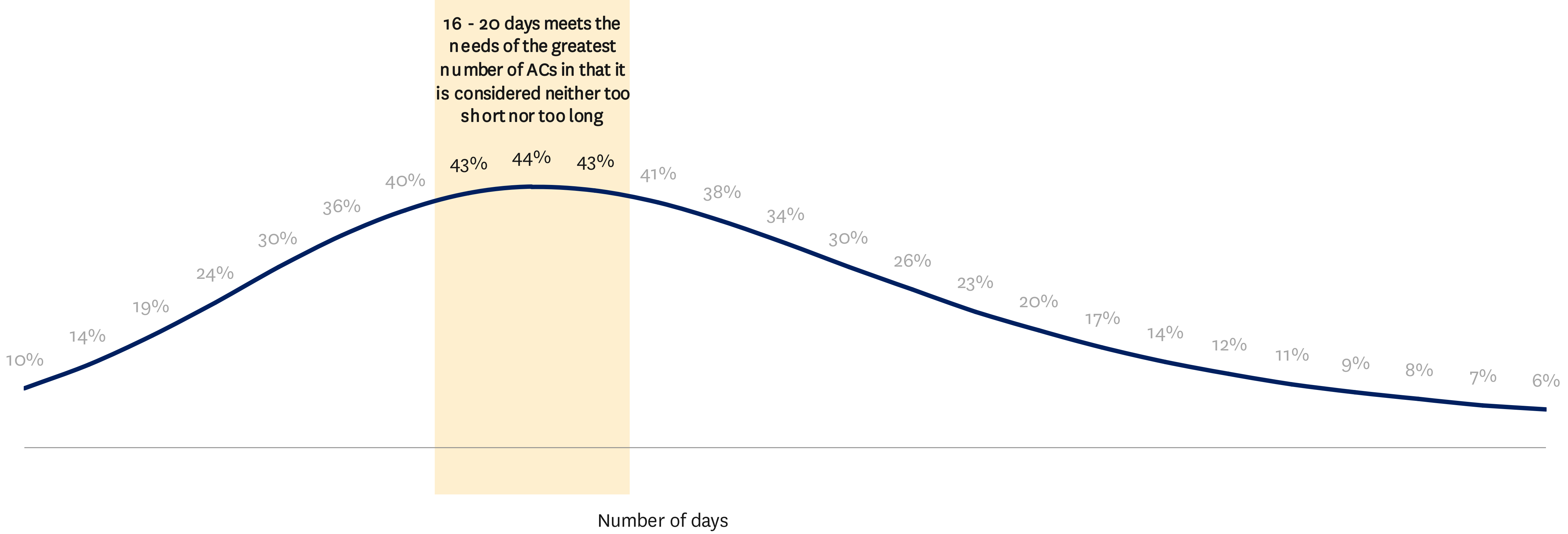


Promoting holiday packages between 16 – 20 days will cater to the broadest range of ACs, ensuring maximum appeal

CANADA

Desired length of holiday in New Zealand (% for whom the number of days is neither too long or too short)

% Active Considerers | Q2 FY24



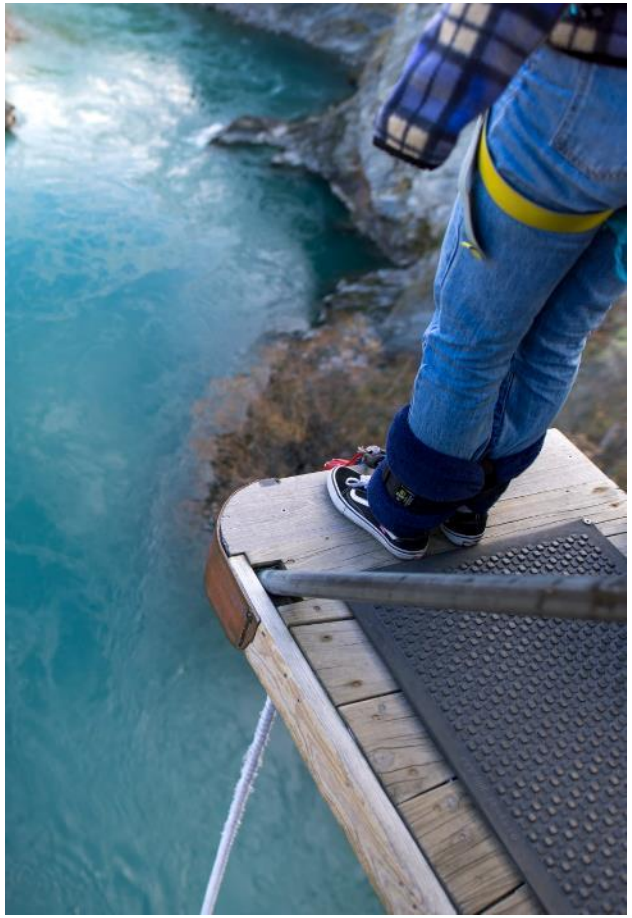
Notes:
1.Sample size: n = 300
Q "Thinking about a future holiday in New Zealand, what would be the minimum and maximum amount of time you would ideally spend in New Zealand?"

TNZ can help shift ACs to the booking stage by working with trade partners to offer deals on flights and assisting them to decide on when to visit New Zealand

CANADA

Barrier to booking holiday to New Zealand

% Active Considerers | Q2 FY24



1. Sample size: Canada Apr 23| Oct 23 n = 300 | 300
2. Question "What is stopping you from making a booking?"

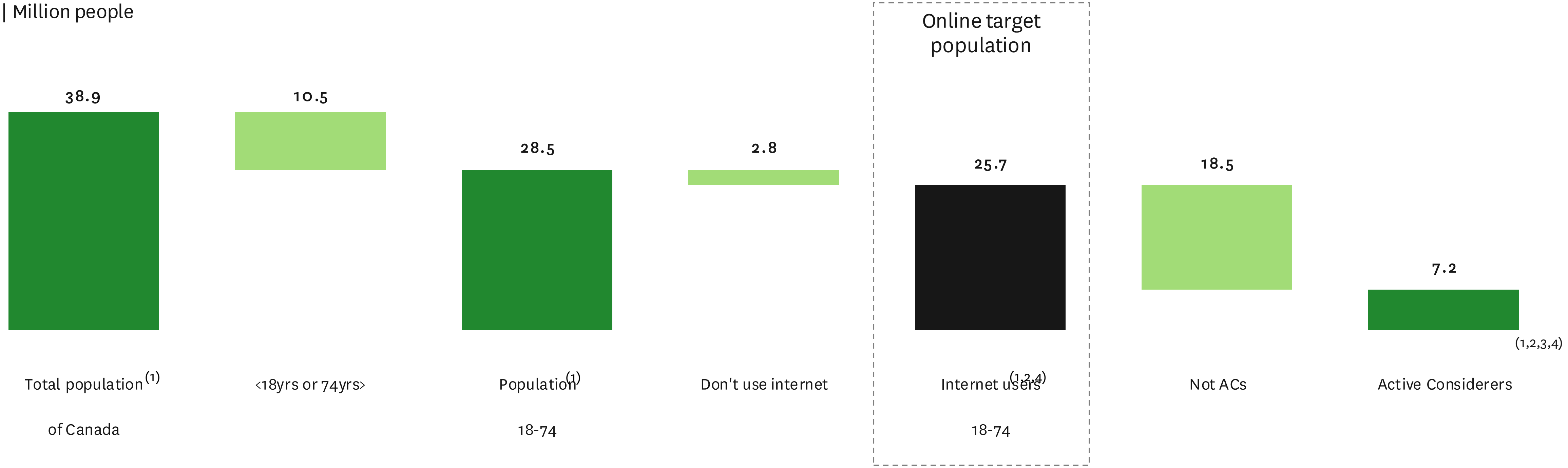
Significantly higher / lower than comparison at 95%

Canada Market Sizing

CANADA

Market size, based on the AC incidence rate for Q2 FY24

Oct23 | Million people

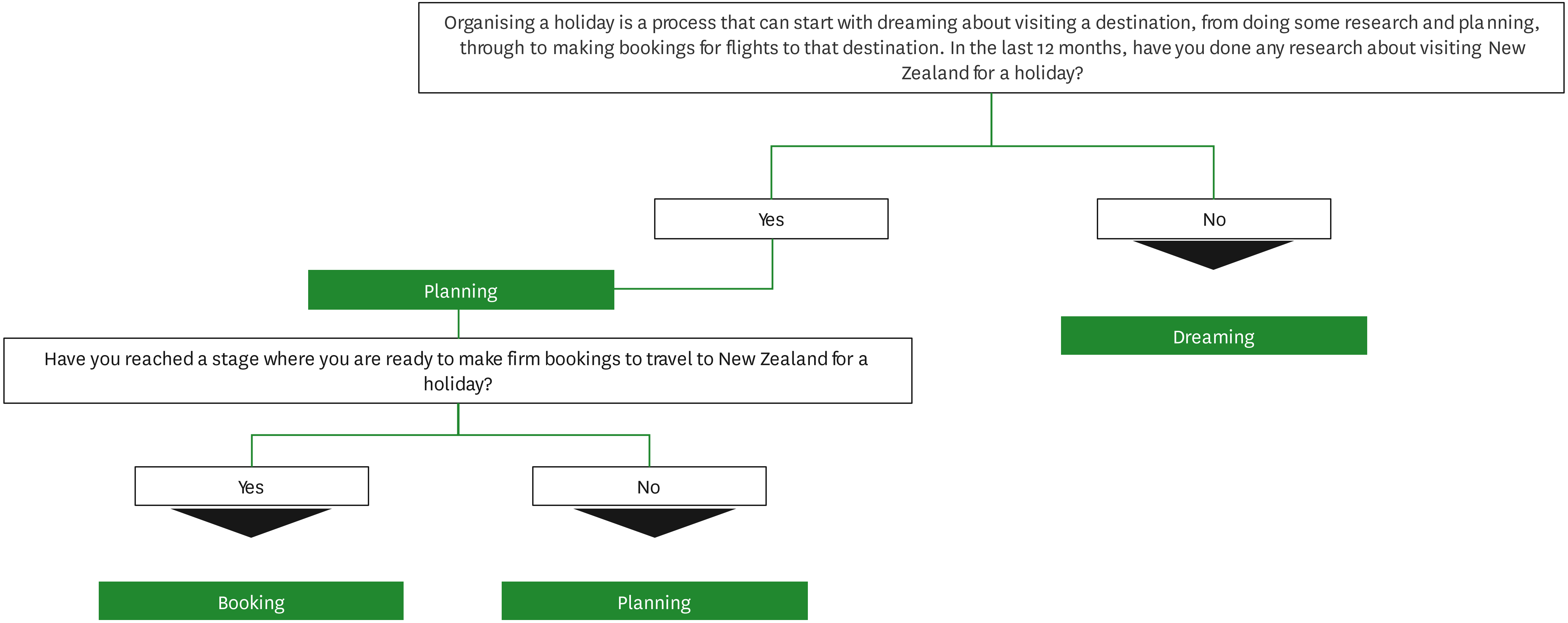


SOURCES/NOTES:

(1) Statistics Canada, Population estimates on July 1st, by age and sex; Time period: at 1 Jul 2022; Coverage: Total population
(2) Kantar Population Profiler, Internet usage by age; Coverage: Canada; Time period: 2020
(3) Tourism New Zealand, Active Considerer Monitor Canada; Time period: Oct 23 dip, under the latest AC definition
(4) Kantar Analysis

Appendix: Visitor consideration funnel

We ask two questions to determine where someone is in the visitor consideration funnel …



Appendix: Brand positioning 'how to'

ACs are biased by their predisposition to New Zealand by design. Because we're already talking to people that really like the idea of visiting New Zealand, New Zealand tends to get rated much more favourably on the brand attributes than competitors do. To better understand relative performance, we need to adjust for this bias and provide an indexed view of performance:

- A score of 100 means performance is in line with expectations after adjusting for bias
- Above 100 indicates a relative strength
- Below 100 indicates a relative weakness

Scores are **relative**, i.e. removing / adding attributes and / or destinations from the analysis would give different scores

Brand associations	New Zealand	Japan	Australia	Taiwan	South Korea	Thailand
Spectacular natural landscapes and scenery						
The locals are friendly and welcoming						
Ideal to relax and refresh						
I would feel safe travelling around this destination						
Things to see and do are affordable						
Affordable to fly to this destination						

- We look at how a given number of competitors perform on a given number of attributes to derive an index that measures expected performance
- It's key to note that the score is relative – any change to the competitor and / or attribute sets will result in a change in the indices
  - For example, when we look at the top 10 versus when we look at the 12 monitor attributes, the scores reported for those same attributes will be different in each attribute set