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Active Considerer (AC) Monitor

Asia Emerging Markets (H1 FY24)

Report

January 2024

NEW ZEALAND TOURISM

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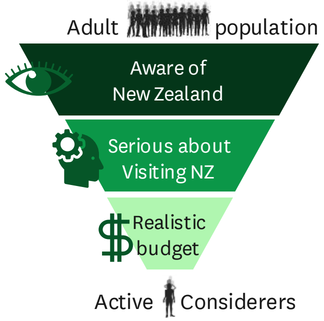
newzealand.com

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 2022 market sizing exercise

Performance Dashboard

	India Q4 FY23	India Q2 FY24	Korea Q4 FY23	Korea Q2 FY24	Singapore Q4 FY23	Singapore Q2 FY24
Incidence of Active Considerers	40%	43%	17%	17%	27%	32%
NZ as a #1 Preferred destination (total)	78%	82%	74%	65%	58%	69%
First	62%	67%	48%	41%	34%	51%
Second	16%	15%	26%	24%	24%	18%
Dreaming	16%	16%	52%	54%	47%	42%
Planning	9%	7%	13%	15%	16%	13%
Booking	75%	76%	35%	31%	37%	45%

Performance Dashboard

Brand areas to focus on

Strengths	Dial up	Strengths	Dial up	Strengths	Dial up
All seasons	Landscapes and scenery	Relationship with the land	Family friendly	Family friendly	Range of adventure
Local culture	Relax and refresh	Indigenous culture	Safe destination	Landscapes & scenery	Clean & unpolluted
Wildlife experiences	Range of experiences	Invites exploration	Range of experiences	Escape the ordinary	Unique experiences
Embraces visitors	Relationship with the land	Range of adventure	Easy to travel around	Amazing beaches	Easy to travel around
Unique experiences	Family friendly	Wildlife	Landscapes and scenery	Invites exploration	Affordable to fly to

Top 5 competitors

(% selected destination in their top five preferred destinations)

Australia	Switzerland	Singapore	Maldives	Japan
39%	39%	34%	24%	20%
Australia	Hawaii	Japan	Switzerland	Canada
47%	33%	31%	29%	26%
Japan	South Korea	Australia	Taiwan	Switzerland
48%	29%	27%	24%	24%

Top 5 questions or barriers to booking

1	What the weather is like	What the weather is like	What the weather is like
2	Range of quality food and beverage options	How easy it is to travel around	How easy it is to travel around
3	How long it takes to travel between the main attractions	How safe it is from crime	How welcoming the locals are
4	Where I should get information about organising a holiday	How long it takes to travel between main attractions	Quality and variety of food and beverage options
5	What practices are in place to keep me safe from Covid	How easy it is to travel around	How safe it is from crime

	Consideration	Preference	Consideration	Preference	Consideration	Preference
Spring	31%	20%	28%	25%	35%	28%
Summer	52%	44%	24%	23%	31%	25%
Autumn	37%	23%	27%	25%	37%	29%
Winter	30%	13%	30%	27%	24%	18%

Key insights - India

- India is an attractive market for TNZ to drive arrivals with the AC incidence now at a high of 43%, equating to a sizeable AC pool of 17.7 million people across its three target cities
- While levels of appeal of New Zealand are softer than they were pre-Covid, long-term growth in both consideration and spend are contributing to the long-term upward trend in the AC incidence. Thus, with an AC pool that is growing and larger than most key markets, and with 76% of ACs in the booking mindset, the focus should be on accelerating conversion to drive arrivals
- To move ACs into arrivals, effort needs to be placed on enhancing New Zealand's competitive positioning and addressing key concerns and barriers to booking
- The primary competitors are Australia, Switzerland, and Singapore. In response to these competitors, brand messaging should highlight New Zealand's strengths, emphasizing its welcoming hospitality and rich local culture. Additionally, messaging should look to strengthen perceptions of New Zealand's stunning landscapes and connection with the land.
- Tactical communications need to address prevalent knowledge gaps and barriers to booking by providing information on various travel options within New Zealand and aiding ACs in determining the most suitable time to visit. Promoting holiday packages between 14 – 22 days will cater to the broadest range of ACs, ensuring maximum appeal

Key insights - South Korea

South Korea remains as an attractive market for TNZ.With an AC pool size of 6.1 million people, 31% of whom are ready to book, South Korea presents a strong opportunity to drive short term arrivals

Within the AC pool, levels of preference for New Zealand have recently softened. Thus, the strategic focus should be on strengthening preference and addressing key concerns and barriers to booking to convert ACs into arrivals

Key competitors are Australia and Hawaii as well as Japan which has been steadily increasing in preference. In response to competitors, brand messaging should emphasise New Zealand's strengths in its unique culture and experiences on offer, including its wildlife experiences, and how it is a place that invites exploration. Additionally, messaging should look to strengthen New Zealand's positioning by building perceptions of New Zealand's stunning landscapes, and being a safe and family friendly destination that is easy to travel around and has a range of experiences on offer

Tactical communications need to address knowledge gaps and barriers to booking by showcasing the things to see and do in New Zealand across various seasons, providing sample itineraries and working with trade partners to offer bundled package deals on flights and accommodation. Promoting holiday packages between 10 – 16 days will cater to the broadest range of ACs, ensuring maximum appeal

Key insights - Singapore

- Singapore presents a growing opportunity for TNZ: Appeal of New Zealand as a holiday destination has recovered to 66% Oct 23, with the incidence of ACs also growing as a result to 32% Oct 23. While 32% AC incidence in Singapore is higher than most of the key markets, Singapore's small population size means that this market presents less of an opportunity to drive high volumes of arrivals (approximately 1.2 million Singaporeans are ACs)

- Among ACs, preference has recently strengthened (from 34% Apr 23 to 51% in Oct 23), surpassing previous levels. Thus, the focus in Singapore should be on maintaining this preference growth momentum among existing ACs and accelerating their conversion through the funnel by addressing key concerns and barriers to booking

- To maintain high preference levels, strategic brand messages should leverage New Zealand's strengths - namely, its beautiful landscape & scenery and unique culture that invites exploration and escapism, and build perceptions that New Zealand offers unique experiences and a range of adventure

- Japan is the key competitor, followed by South Korea and Australia based on preference. Positively, destination New Zealand advertising is cutting through, displaying higher levels of memorability than its top competitors

- Tactical marketing messages need to address key knowledge gaps and barriers to booking by reassuring ACs of New Zealand's weather, how easy it is to travel around, and how welcoming the locals are. Promoting holiday packages between 12 – 20 days will cater to the broadest range of ACs. Additionally, offering bundled deals on flights and accommodation will help facilitate conversion of Acs.

INDIA


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

Active Considerer journey funnel – India

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 (160,000 INR per person on a holiday to New Zealand)

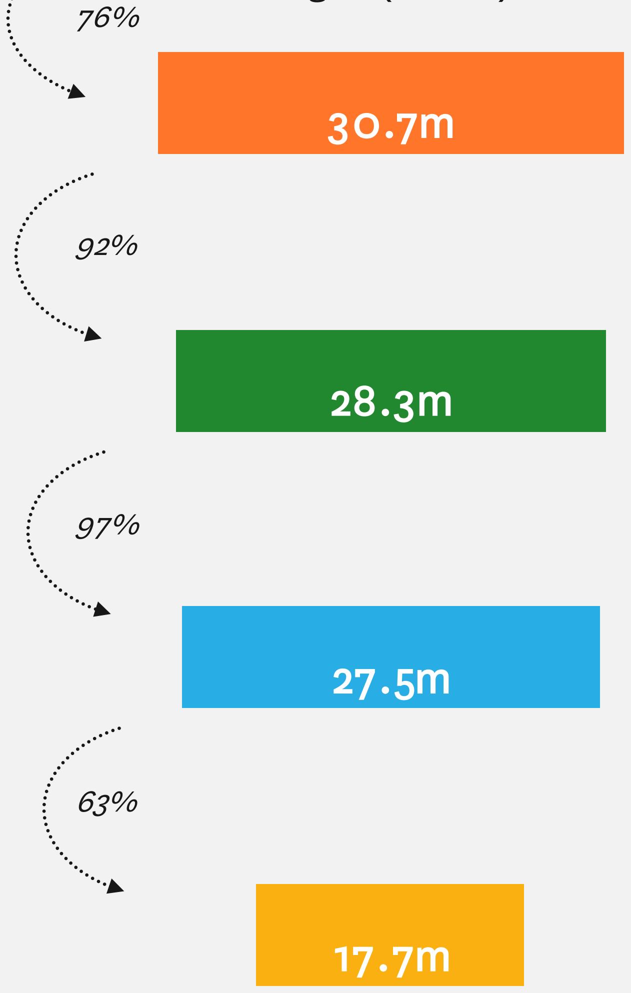
Online population, 18-74 years of age[1] (40.4m)

Find New Zealand highly appealing as a holiday destination, and...

Would seriously consider visiting in the next three years, and...

New Zealand is a preferred destination for their next holiday, and...

Willing to spend at least INR 160,000 per person on a holiday to New Zealand[2]



1. Target cities are New Delhi, Bangalore and Mumbai
2. Including accommodation and daily expenses. Based off actual market data spend (IVS 2019)

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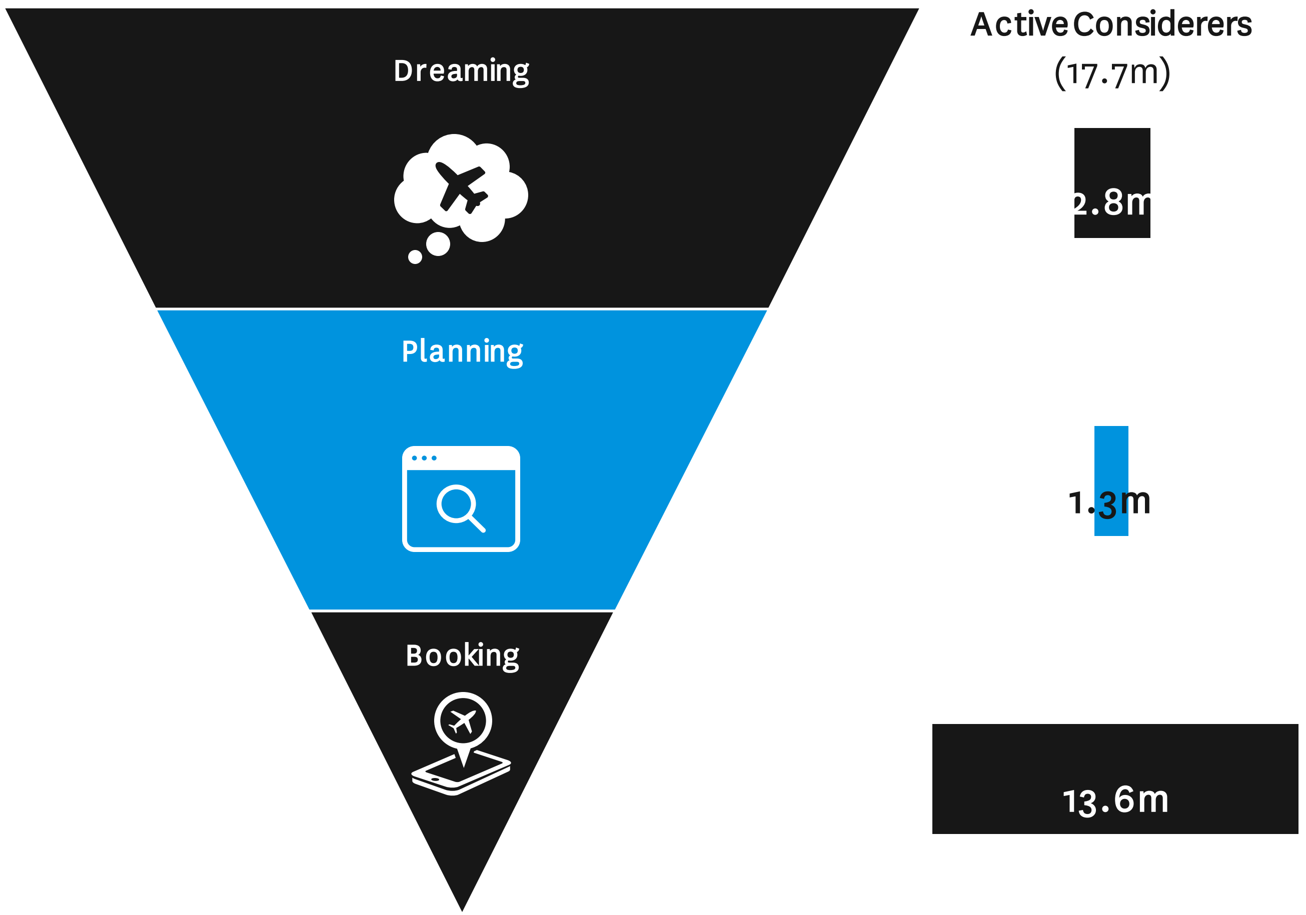
Consumer Journey funnel to New Zealand - India



Size (%)

	ACs	Priority Mindset Group
Dreaming	16%	20%
Planning	7%	10%
Booking	76%	70%

Comments

A large proportion of ACs (76%) claim to be ready to book, and this figure should be placed in context:

- '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

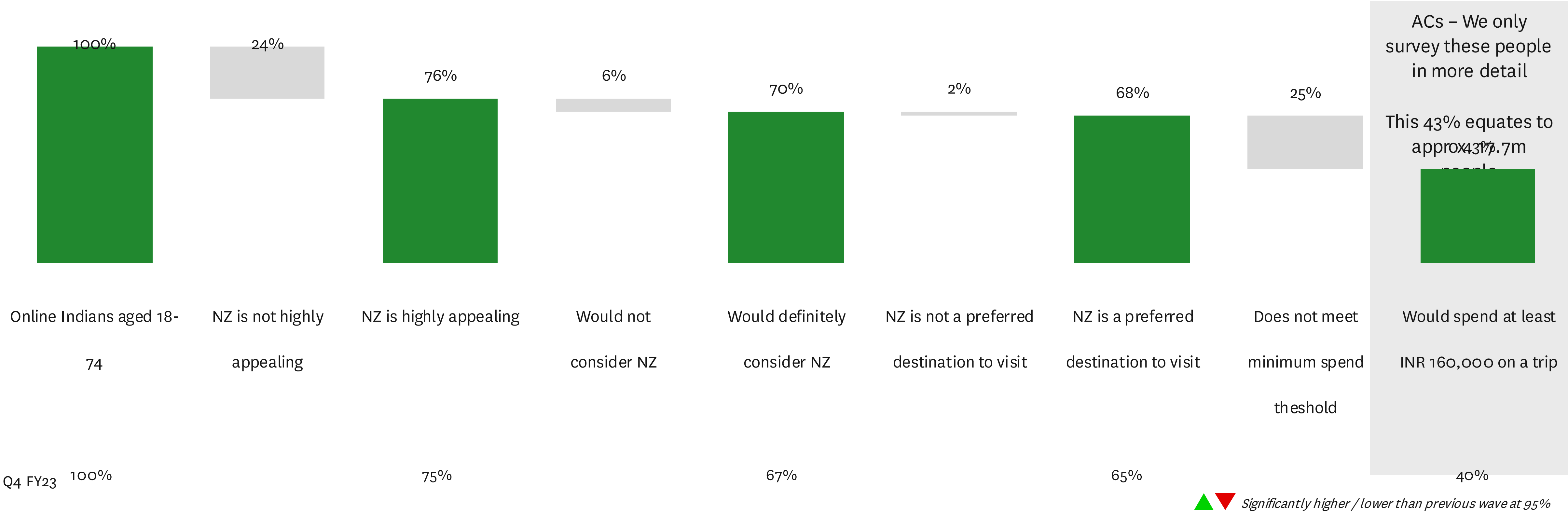
▲▼ *Significantly higher / lower than non-priority group*

Sample sizes: ACs Oct 23 n = 301, Priority Mindset Group n=65

With an AC incidence of 43%, India's three target cities represent a sizable opportunity for TNZ of 17.7 million ACs

Qualifying criteria for defining ACs

% Online users aged 18-74 in the target cities | Q2 FY24

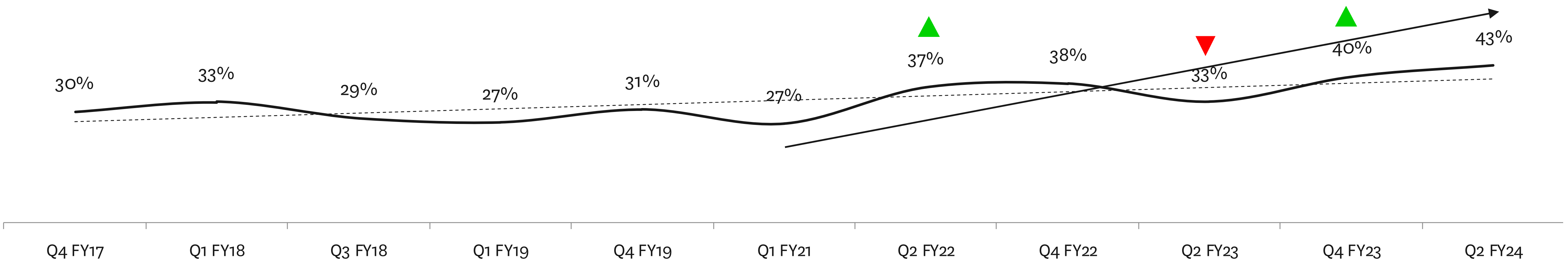


Sample size: Q4 FY23 n = 2,180 Q2 FY24 n = 906

The AC incidence has been growing over the last year, and at 43% it is at the highest level seen over the last 5 years

Incidence of ACs

% Online users aged 18-74 in the target cities



▲▼ *Significantly higher / lower than six month prior at 95%*

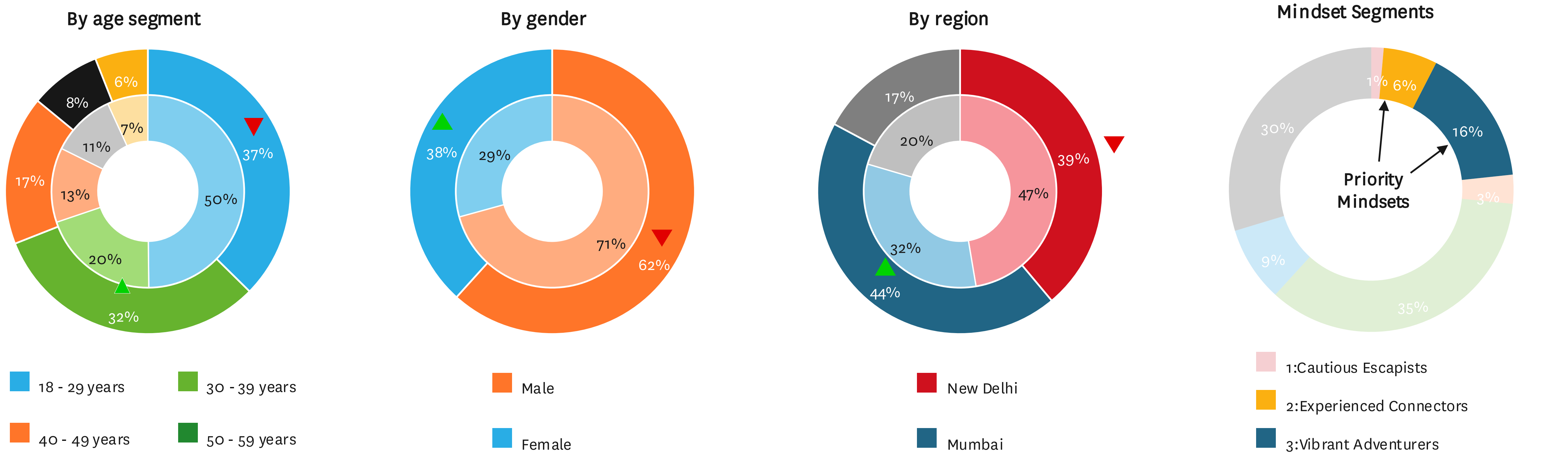
Sample size: Q4 FY17 n=741; Q1 FY18 n=816; Q3 FY18 n=817, Q1 FY19 n=763; Q4 FY19 n=726; Q1 FY21 n=1016; Q2 FY22 n=867; Q4 FY22 n = 1,419; Q2 FY23 n = 1,349; Q4 FY23 n = 2,180; Q2 FY24 n = 906

% 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 160,000 INR while holidaying in New Zealand

Compared to non-ACs, ACs are more likely to be aged 30 – 39 years and living in Mumbai; the global priority mindsets account for 22% of India's AC pool

Profile of Active Considerer
% Active Considerers | % Non Active Considerers | Q4 FY24

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

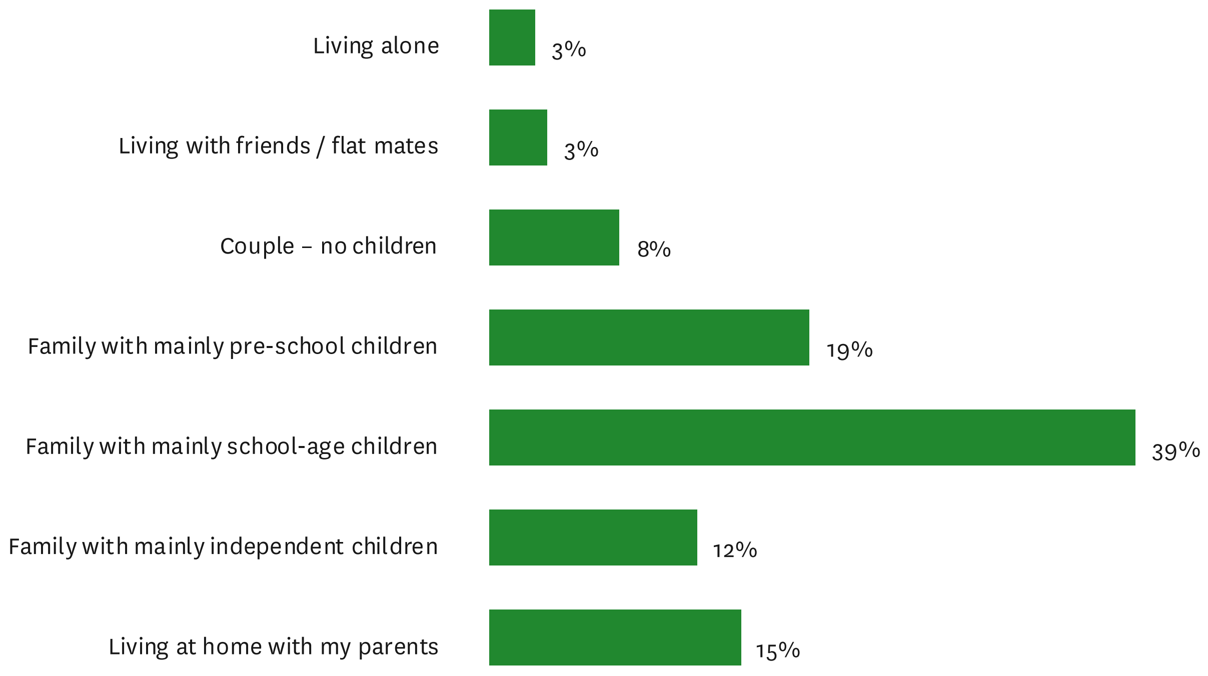


Significantly higher / lower than non AC's

The majority of the AC pool in India live with family

Household Composition

% Active Considerers | Oct 23



Household Income

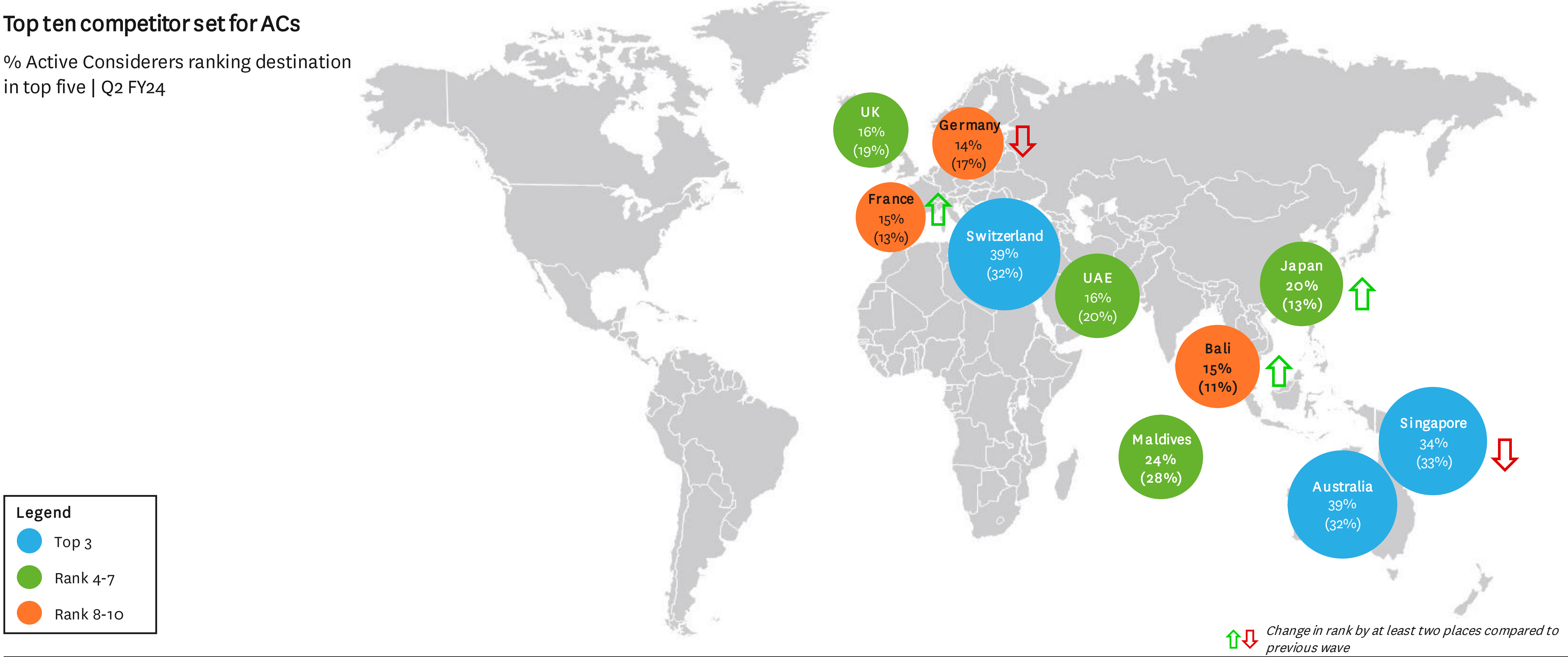
% Active Considerers | Oct 23

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 Switzerland are New Zealand's top competitors based on preference, followed by Singapore; preference for Japan is growing (as we seen in other markets also)

Top ten competitor set for ACs

% Active Considerers ranking destination in top five | Q2 FY24



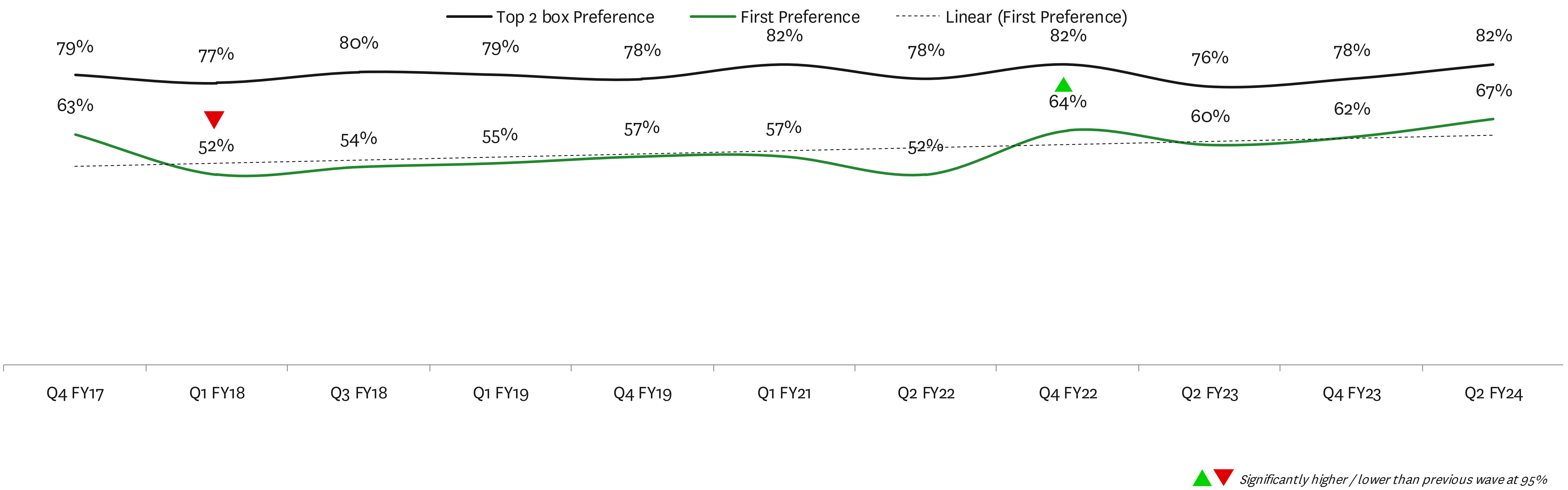
Sample size: ACs Q4 FY22 n = 300 ; Q2 FY23 n = 300; Q4 FY23 n = 300; Q2 FY24 n = 300

Q "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a vacation?"

First choice preference for New Zealand is at a high level of 67%

New Zealand as a #1 Preferred Destination

% Active Considerers



Sample size: Q4 FY17 ACs n=235; Q1 FY18 Acs n=231; Q3 FY18 Acs n=211; Q1 FY19 ACs n=206; Q4 FY19 ACs n=217; Q3 FYQ1 FY21 ACs n=300; Q2 FY22 ACs n=300; Q4 FY22 n = 300; Q2 FY23 n = 300, Q4 FY23 n = 300, Q2 FY24 n = 300
Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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 NZ 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 examples:

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

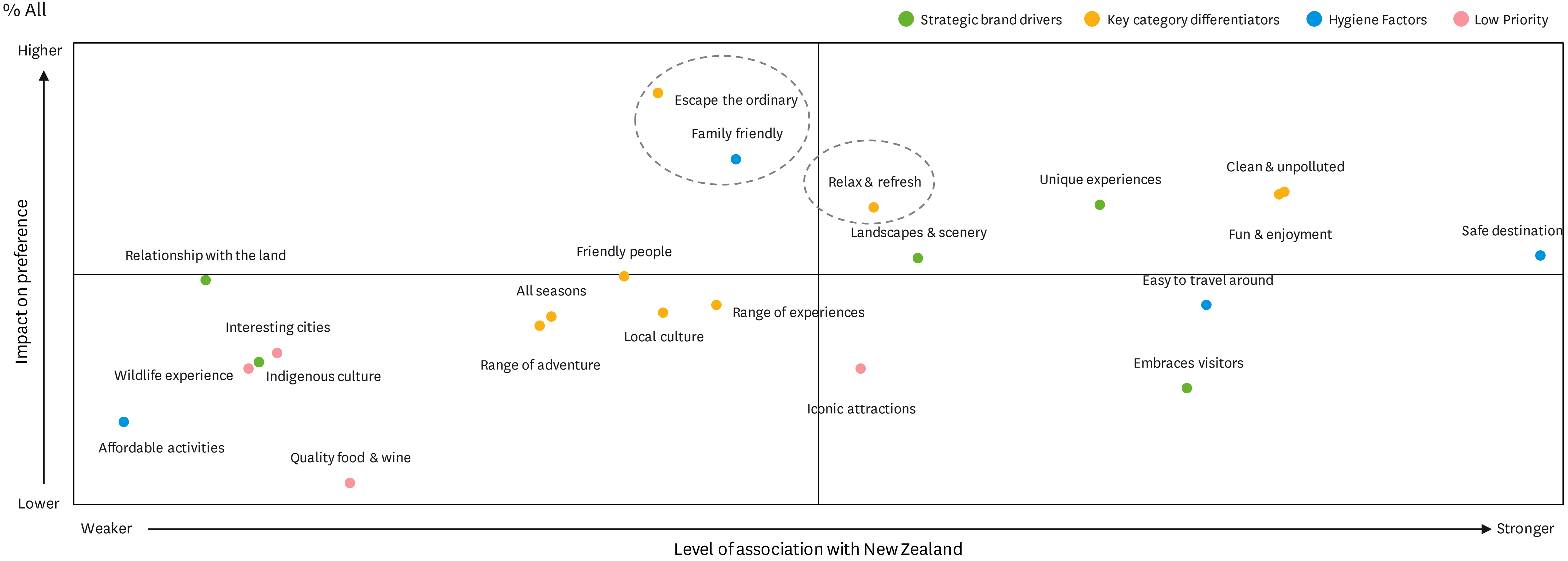
Shorthand	Full wording
Affordable activities	Things to see and do are affordable
Affordable to fly to	It's affordable to fly to this destination
All seasons	Suitable for a holiday all year round
Clean & unpolluted	The environment there is clean and unpolluted
Easy to travel around	It's easy to travel 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 performs strongly on most of the high impact drivers but there is a strategic opportunity to boost perceptions of family friendliness, being a place to escape the ordinary and being a place to relax and refresh

Brand Associations of New Zealand x Impact on preference

% All



Sample size: India Q2 FY24 n = 300
Question: "Which destinations, if any, do you associate with this statement?"
'Affordable to fly to' driver not included due to low impact and level of association
'Excitement', 'Amazing beaches' and 'Exploration' drivers added in FY24 and not included in impact analysis

New Zealand performs well across the board, particularly on embracing of visitors and having rich local culture, but there is an opportunity to boost perceptions of landscapes and scenery as well as the profound connection with the land which both serve as strategic brand drivers

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)

	Brand associations	New Zealand	Switzerland	Australia	Singapore	Maldives	Japan
Strategic Brand Drivers	Unique experiences	102	93	88	98	98	129
	Landscapes & scenery	98	107	90	99	105	107
	Relationship with the land	97	101	88	94	122	120
	Indigenous culture	100	92	104	99	89	114
	Embraces visitors	103	90	83	103	114	104
	Invites exploration	101	104	118	84	80	80
Key Category Differentiators	Escape the ordinary	101	94	88	107	113	95
	Clean & unpolluted	100	114	82	95	95	112
	Fun & enjoyment	99	111	100	98	85	100
	Relax & refresh	97	115	81	108	109	96
	Friendly people	101	100	86	113	100	91
	Range of experiences	95	118	97	93	110	91
	Local culture	104	79	95	107	82	131
	All seasons	105	99	100	100	80	79
	Range of adventure	100	99	106	98	112	63
	Amazing beaches	99	85	119	100	114	64

Actions for TNZ:

Strengths:

- All seasons
- Local culture
- Embraces visitors
- Unique experiences

Drivers to dial up:

- Landscapes and scenery
- Relax and refresh
- Range of experiences
- Relationship with the land

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Sample size: Q2 FY24 n = 300
Question: "Which destinations, if any, do you associate with this statement?"
'Exploration' 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

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New Zealand's performance on hygiene factors is comparable to other competitor destinations but there is room to boost perceptions of its family friendliness (important given the AC base skews to 30 - 49 yrs. olds who are most likely to be young families)

Relative brand positioning for Hygiene Factors and Low Priority

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

	Brand associations	New Zealand	Switzerland	Australia	Singapore	Maldives	Japan
Hygiene Factors	Family friendly	97	107	98	96	100	105
	Safe destination	101	107	73	115	97	109
	Easy to travel around	101	97	87	104	105	106
	Affordable activities	101	89	91	105	123	90
	Affordable to fly to	98	95	88	105	132	90
	Excitement	99	113	91	85	100	114
Low Priority	Interesting cities	96	101	113	89	83	131
	Wildlife experience	104	85	120	110	72	67
	Iconic attractions	100	107	101	93	87	97
	Quality food & wine	100	90	100	105	96	109

Actions for TNZ:

Strengths:

- Wildlife experience

Drivers to dial up:

- Family friendliness
- Interesting cities

Sample size: Q2 FY24 n = 300
Question: "Which destinations, if any, do you associate with this statement?"
'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

Tactical communications need to address key concerns among ACs, specifically hygiene factors such as weather, safety, and ease of travel within New Zealand

Top ten knowledge gaps

% Active Considerers | Q2 FY24

	What do ACs want to know more about before choosing New Zealand?	Q2 FY24
1	What the weather is like	47%
2	The range of quality food and beverage options	46%
3	How long it takes to travel between the main attractions	46%
4	Where I should get information about organising a holiday	46%
5	What practices are in place to keep me safe from Covid	44%
6	How safe it is to participate in adventure activities	44%
7	How easy it is to travel around	42%
8	How welcoming the locals are	41%
9	Whether there is a broad enough variety of things to see and do	40%
10	The length of time required to fly to New Zealand	37%

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Sample size: Q4 FY23 | Q2 FY24 n = 300 | 300
Question: "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"
Note: Results not comparable with Q4 FY23 as there was a lot of change in answer codes between waves

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Knowledge gaps vary by funnel stage so targeted messaging is recommended to move ACs through the funnel: for instance, messages around welcoming locals will have greater impact on Dreamers whereas those looking to book will be more influenced by messages around the variety of things to see and do

Top ten knowledge gaps, by funnel stage

% Active Considerers | Q2 FY24

Caution: Low base sizes

	What do ACs want to know more about before choosing New Zealand?	Dreaming	Planning	Booking
1	What the weather is like	43%	*Low base sizes*	46%
2	The range of quality food and beverage options	46%		45%
3	How long it takes to travel between the main attractions	30%		50%
4	Where I should get information about organising a holiday	48%		45%
5	What practices are in place to keep me safe from Covid	47%		44%
6	How safe it is to participate in adventure activities	39%		47%
7	How easy it is to travel around	49%		40%
8	How welcoming the locals are	51%		37%
9	Whether there is a broad enough variety of things to see and do	27%		44% ▲
10	The length of time required to fly to New Zealand	27%		40%

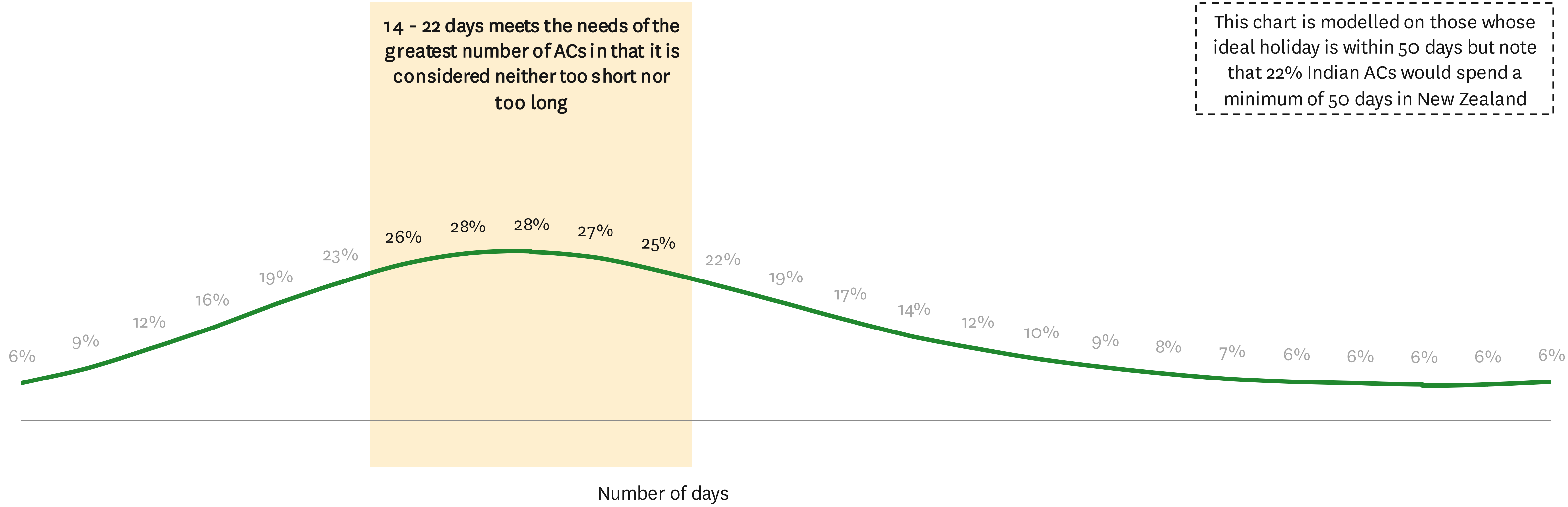
▲▼ *Significantly higher / lower than comparison group at 95%*

1. Sample size Dreaming n = 42, Planning n = 20, Booking n = 238
2. Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your n ext holiday?"

Promoting holiday packages between 14 – 22 days will cater to the broadest range of ACs, ensuring maximum appeal

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

% Active Considerers | Q2 FY24



This chart is modelled on those whose ideal holiday is within 50 days but note that 22% Indian ACs would spend a minimum of 50 days in New Zealand

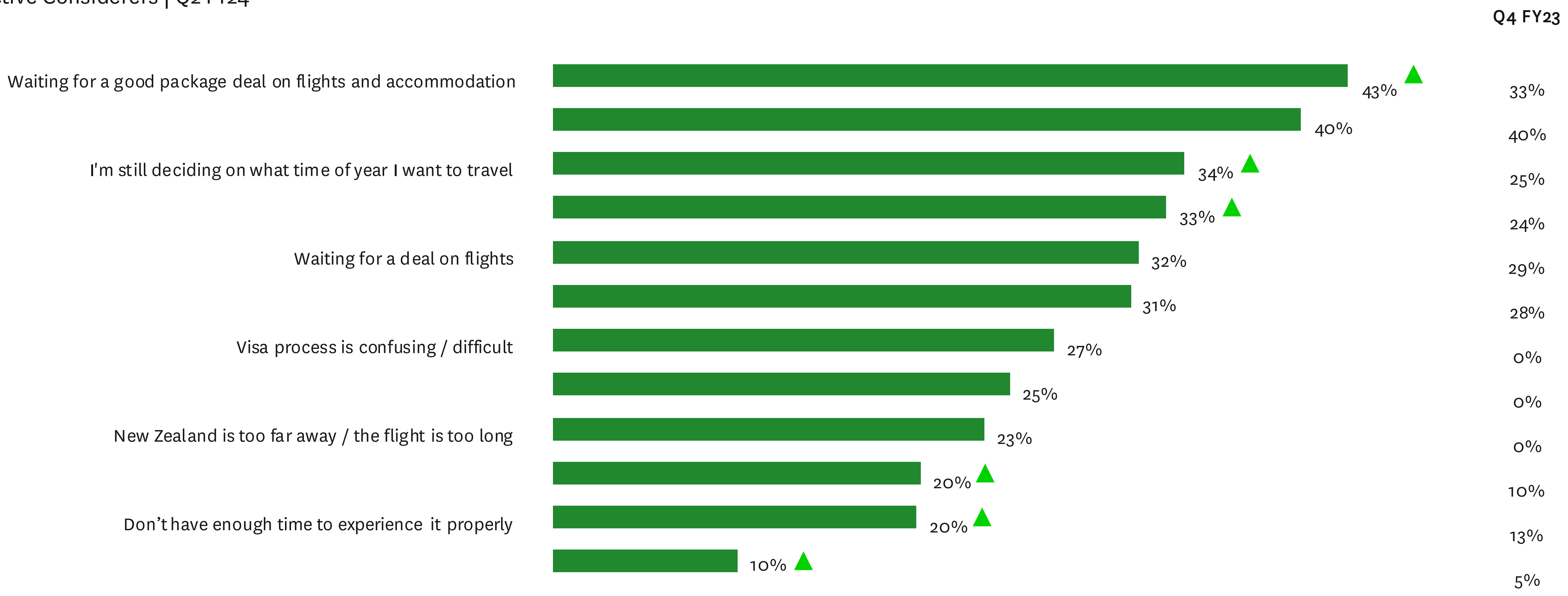
Sample size: Q2 FY24 n = 300

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 assist in encouraging ACs to book by offering information on various travel options within New Zealand and aiding ACs in determining the most suitable time to visit

Barriers to booking holiday to New Zealand

% Active Considerers | Q2 FY24



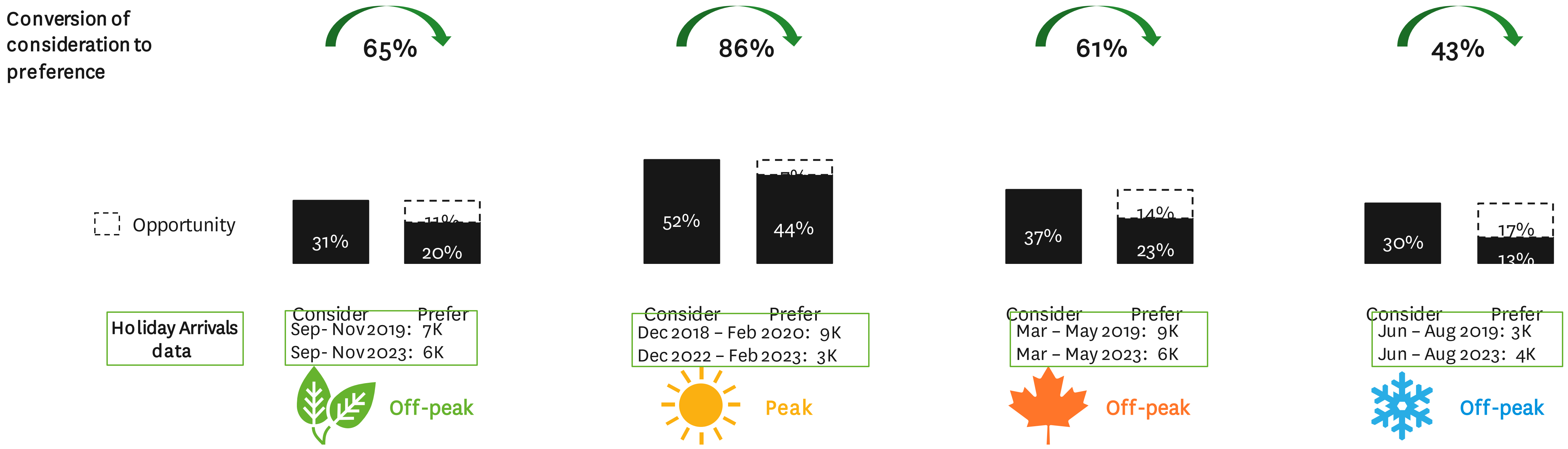
Significantly higher / lower than previous wave at 95%

Sample size: Q4 FY23 | Q2 FY24 n = 231 | 246
Question "What is stopping you from making a booking?"

Although preference is strongest for summer, there are opportunities for seasonal dispersal across off-peak seasons

Seasons – consideration & preference

% Active Considerers | Q2 FY24

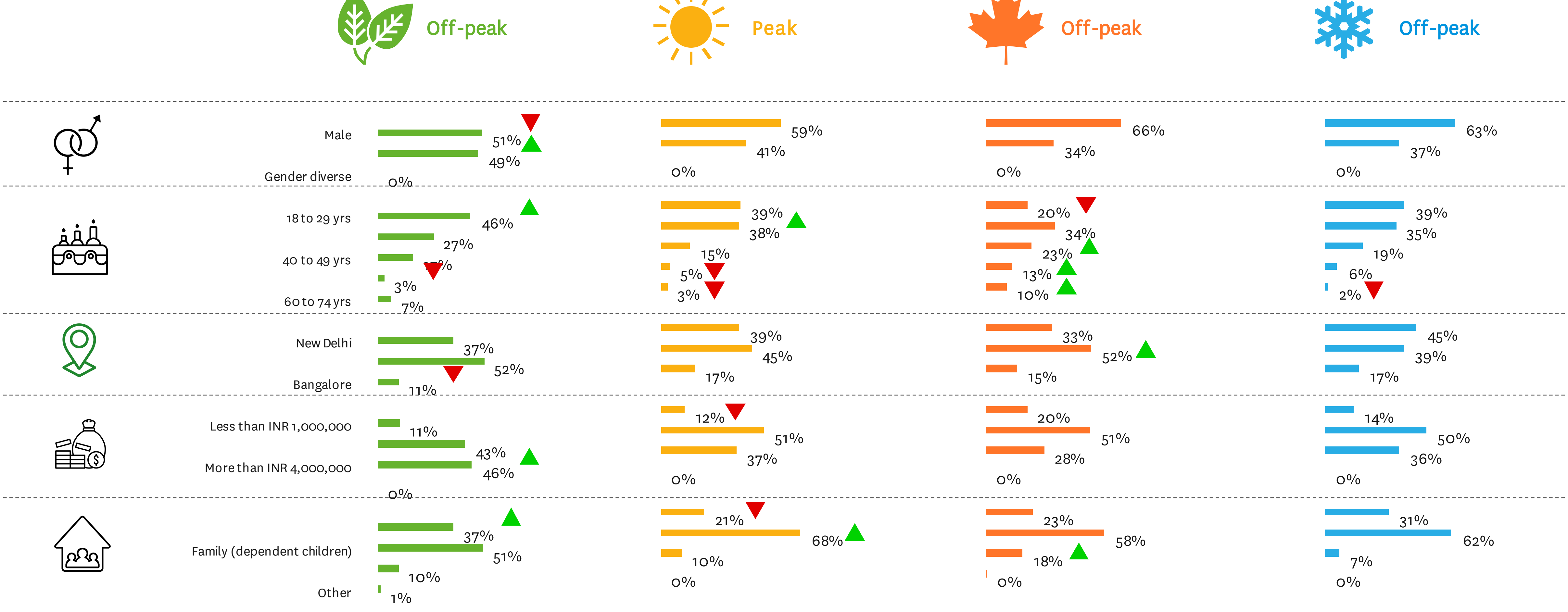


Sample size n=300
Spring 'Off-peak' refers to the period Sep, Oct, Nov; 'Peak' refers to the period Dec, Jan, Feb; Autumn 'Off-peak' refers to the period Mar, Apr, May; 'Off peak' refers to the period Jun, Jul, Aug
Stats NZ International Visitor Arrivals Dec 2018 – Nov 2019 and Dec 2022 – Feb 2023

There is some variation in the demographic profiles of considerers for each season; for instance, spring considerers skew towards females and younger ACs while autumn considerers skew towards older age groups

Profile of Seasonal Considerers

% Considerers of each season | Q2 FY24



1. Sample sizes: Spring n = 259 | Summer n = 300 | Autumn n = 248 | Winter n = 166

Significantly higher / lower than non-considerers of that season

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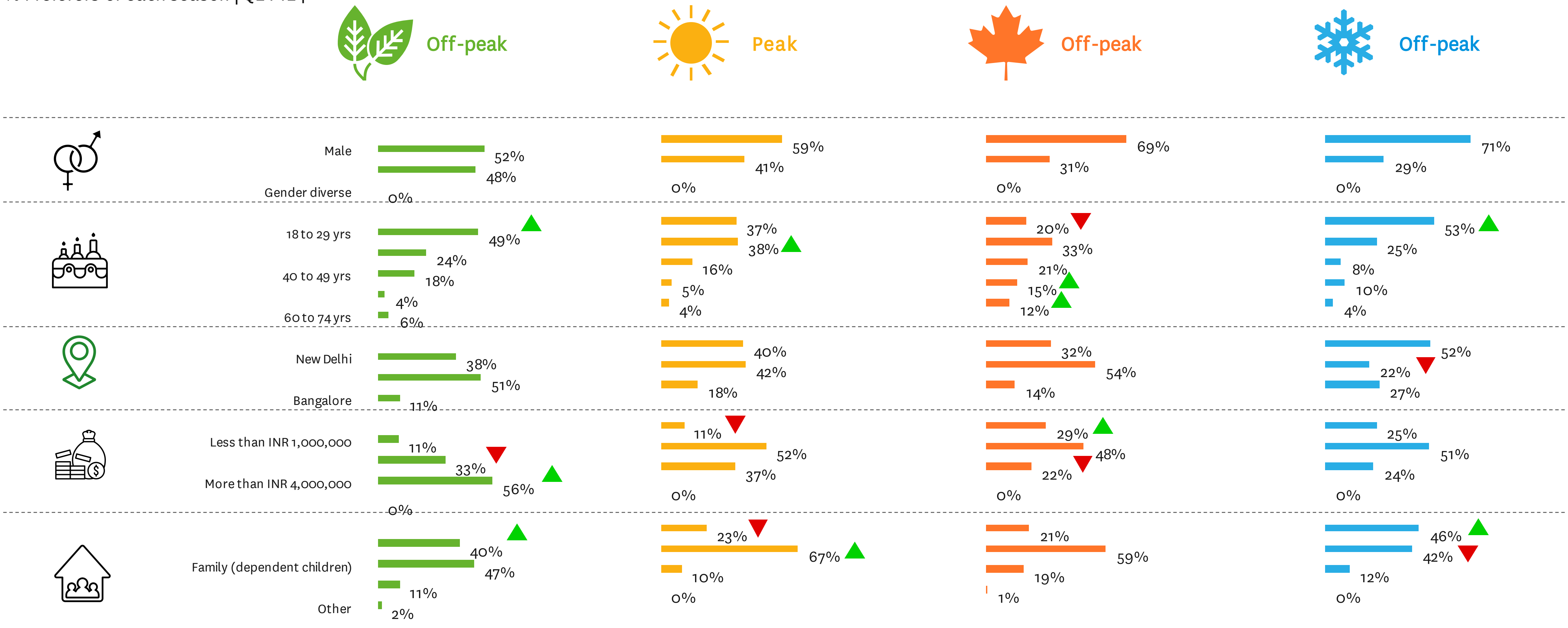
The demographic profile of preferers follows a similar trend to considerers, however winter preferers are more skewed towards younger visitors and SINKs / DINKs*

Profile of Seasonal Preferers

% Preferers of each season | Q2 FY24



- Sample sizes: Spring n = 52 | Summer n = 136 | Autumn n = 65 | Winter n = 41
- *SINKs/DINKs = Single income no Kids/Double income no Kids

Significantly higher / lower than non-preferers of that season

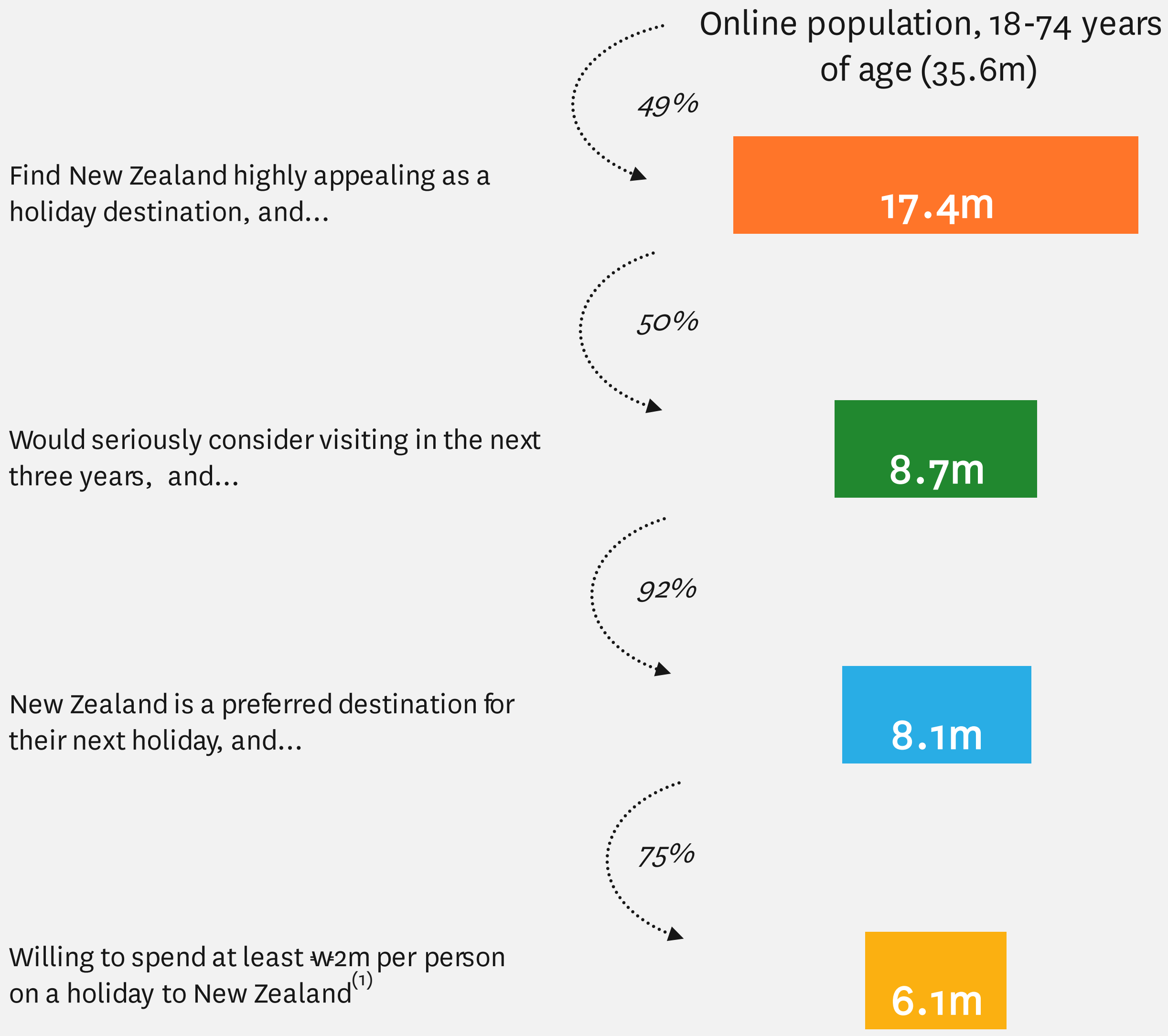
SOUTH KOREA

CANADA
USA
UK
GERMANY
CHINA
JAPAN
INDIA
SINGAPORE
AUSTRALIA
NEW ZEALAND

Active Considerer journey funnel – South Korea

Active Considerers definition

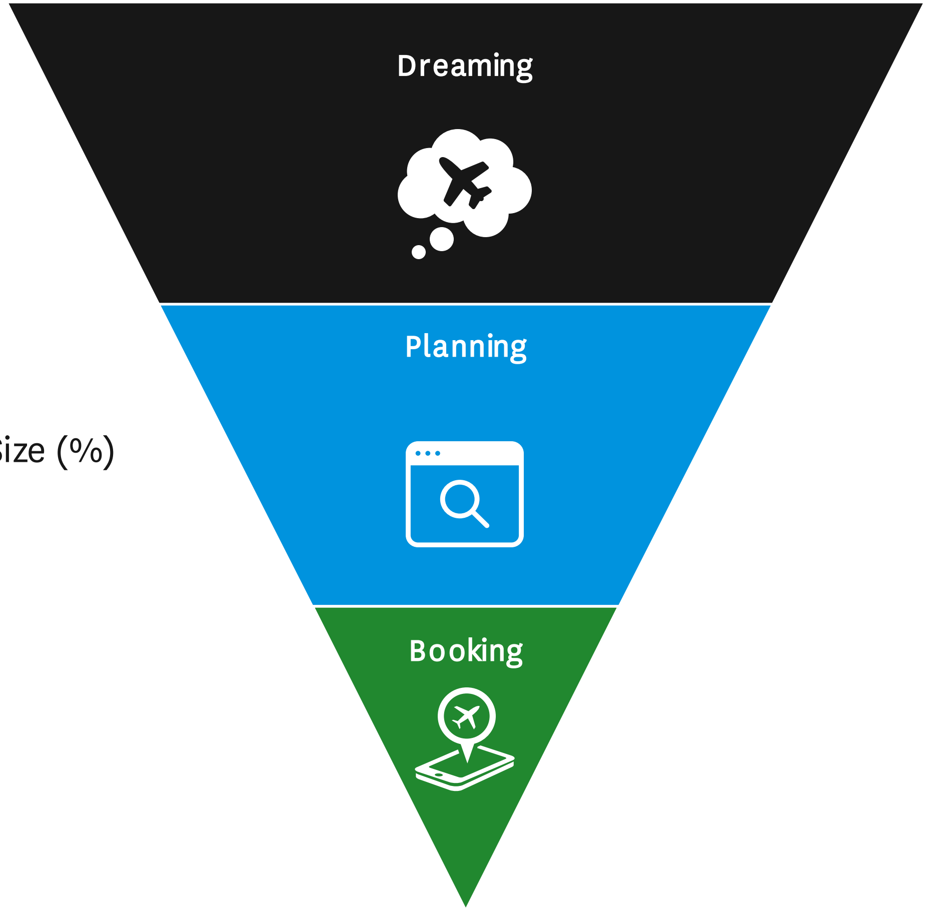
Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation and have a realistic budget for their visit (₩2m per person on a holiday to New Zealand)



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

Consumer Journey funnel to New Zealand – South Korea

Size (%)



Size (%)

	Active Considerers (6.1m)	AC's	Priority Mindset Group
Dreaming	3.3m	54%	50%
Planning	0.9m	15%	10%
Booking	1.9m	31%	41%

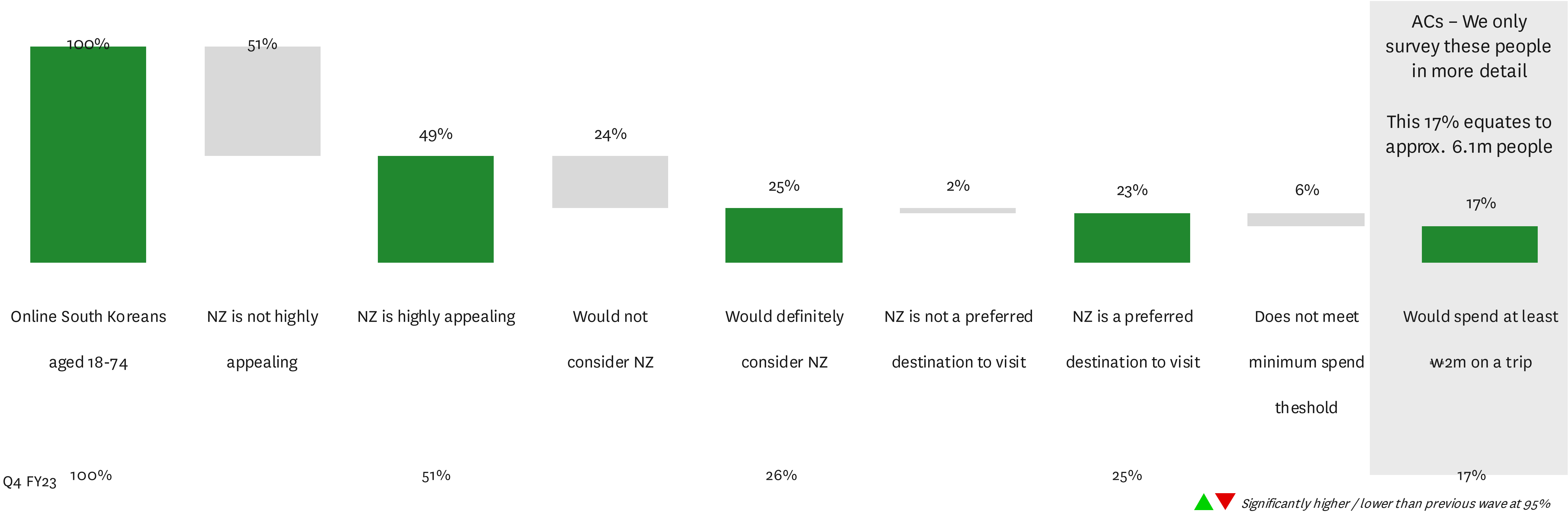
Comments

- ‘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 group*

South Korea remains a sizable opportunity for TNZ to drive arrivals with an AC incidence of 17%, equating to approximately 6.1 million people – this is unchanged from Q4 FY23

Qualifying criteria for defining ACs
% Online users aged 18-74 | Q2 FY24



Sample sizes: Q4 FY23 n = 2,704 | Q2 FY24 n = 2,582

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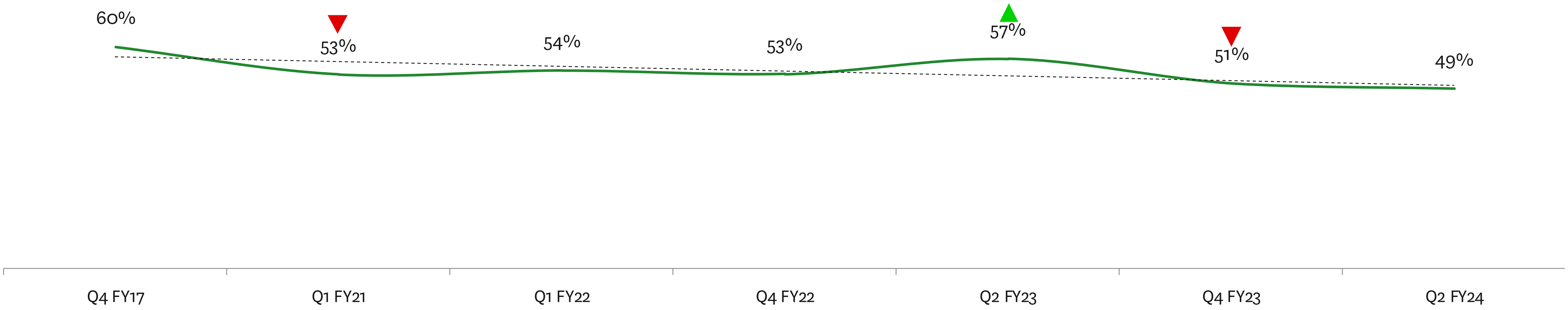
100% PURE NEW ZEALAND

Appeal of New Zealand as a holiday destination remains broadly stable over time

Appeal

% Online users aged 18-74

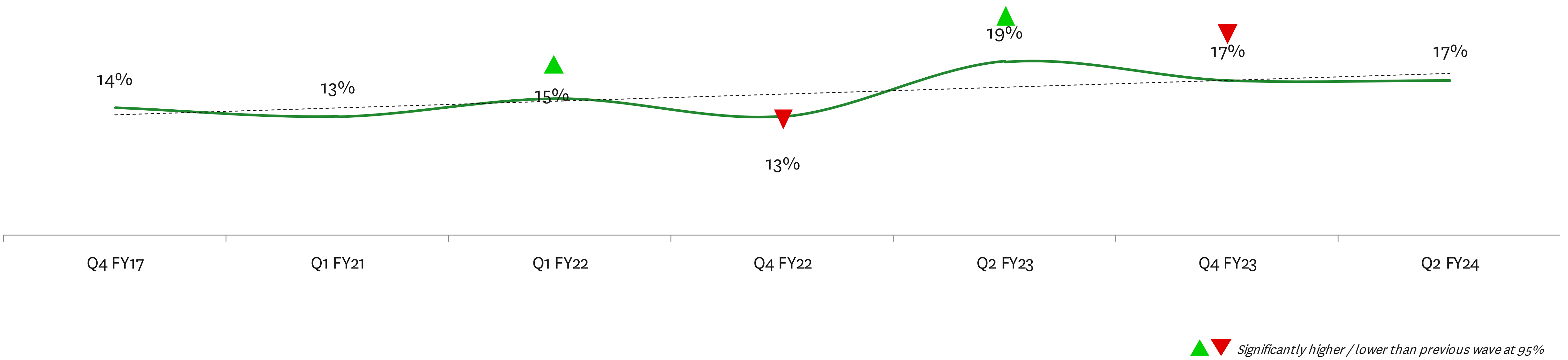


Significantly higher / lower than previous wave at 95%

Sample sizes: Q4 FY17 n = 3,386 Q1 FY21 n = 4,230; Q2 FY22 n = 2,855; Q4 FY22 n = 3,977; Q2 FY23 n = 3,147; Q4 FY23 n = 2,704; Q2 FY24 n = 2,582

The AC incidence in South Korea has fluctuated over time but the long-term trend is up

Incidence of ACs
% Online users aged 18-74



Sample sizes: Q4 FY17 n = 3,386 | Q1 FY21 n = 4,230 | Q1 FY22 n = 2,855 | Q4 FY22 n = 3,977 | Q2 FY23 n = 3,147 | Q4 FY23 n = 2,704 | Q2 FY24 n = 2,582

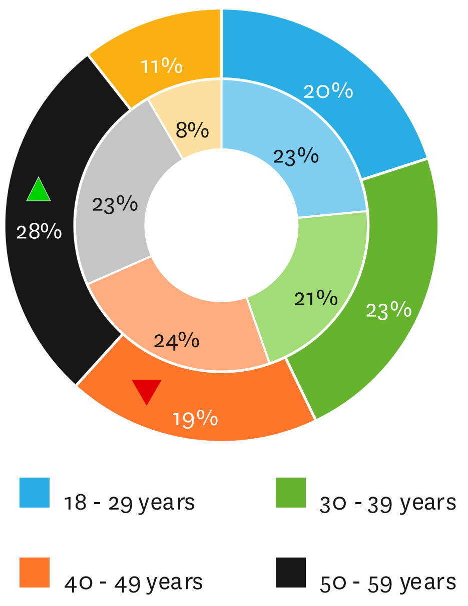
Compared to non-ACs, ACs are more likely to be male, aged 50-59 years and live in Seoul; the global priority mindsets, Experienced Connectors and Vibrant Adventurers make up 19% of the AC pool

Profile of Active Considerer

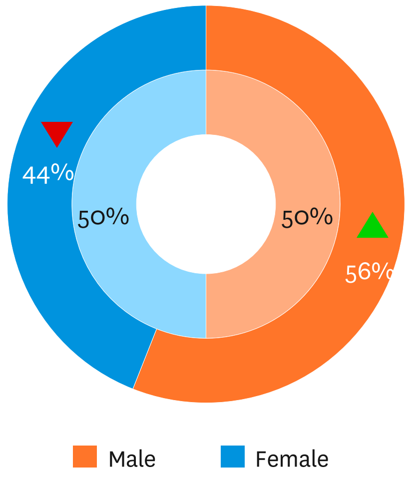
% Active Considerers vs % Non Active Considerers | Q2 FY24

Outer ring: South Korean Active Considerers
Inner ring : South Korean non-Active Considerers

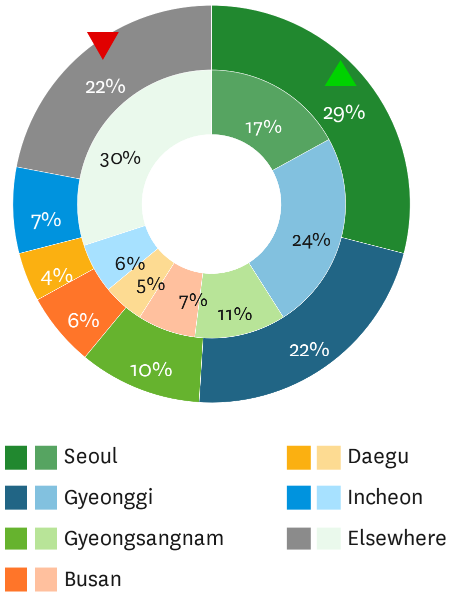
By age segment(1)



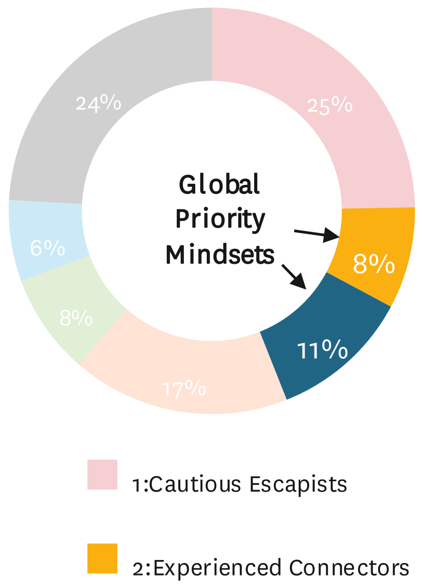
By gender(1)



By region(1)



By Mindset(2)



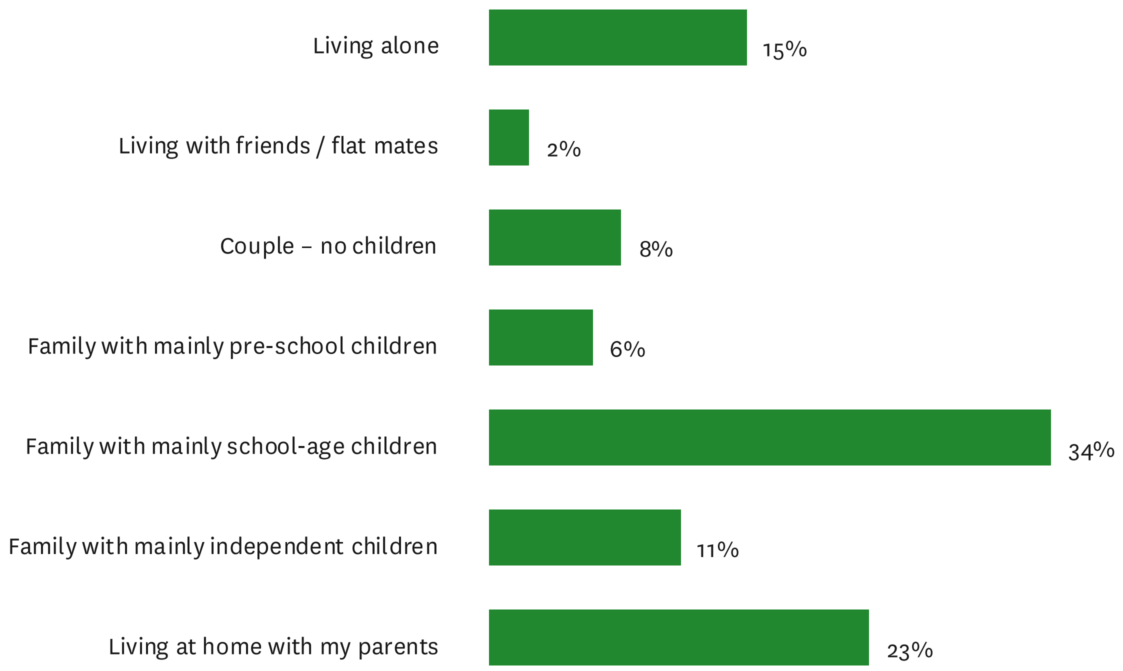
Significantly higher / lower than non AC's

1. Sample sizes: ACs n = 404 | Non ACs n = 2,178
2. Sample size: n = 299

The majority of ACs in South Korea live with family members

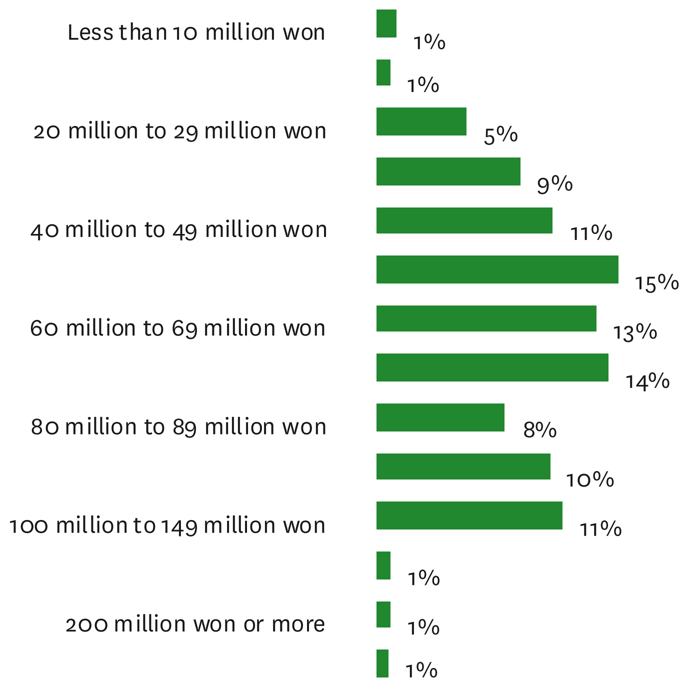
Household Composition

% Active Considerers | Oct 23



Household Income

% Active Considerers | Oct 23

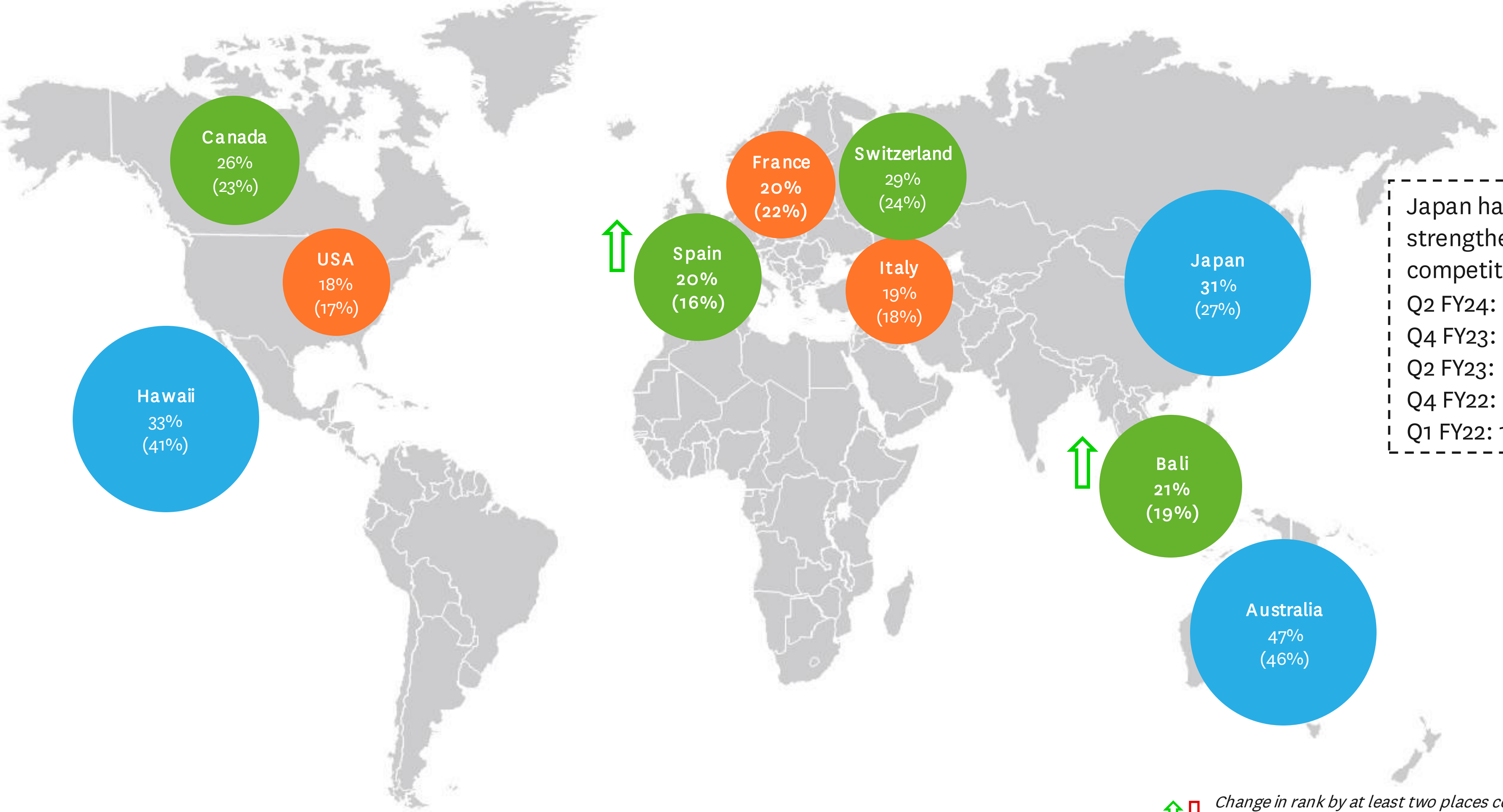


1. Sample size: n = 299
2. Q: "Which of these best describes your household?"
3. Q: "What is your total annual household income?"

Australia, Hawaii and Japan are New Zealand's top three competitors

Top ten competitor set for ACs

% Active Considerers | Q2 FY24



Japan has strengthened as a competitor over time:
Q2 FY24: 31%
Q4 FY23: 27%
Q2 FY23: 25%
Q4 FY22: 21%
Q1 FY22: 16%

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

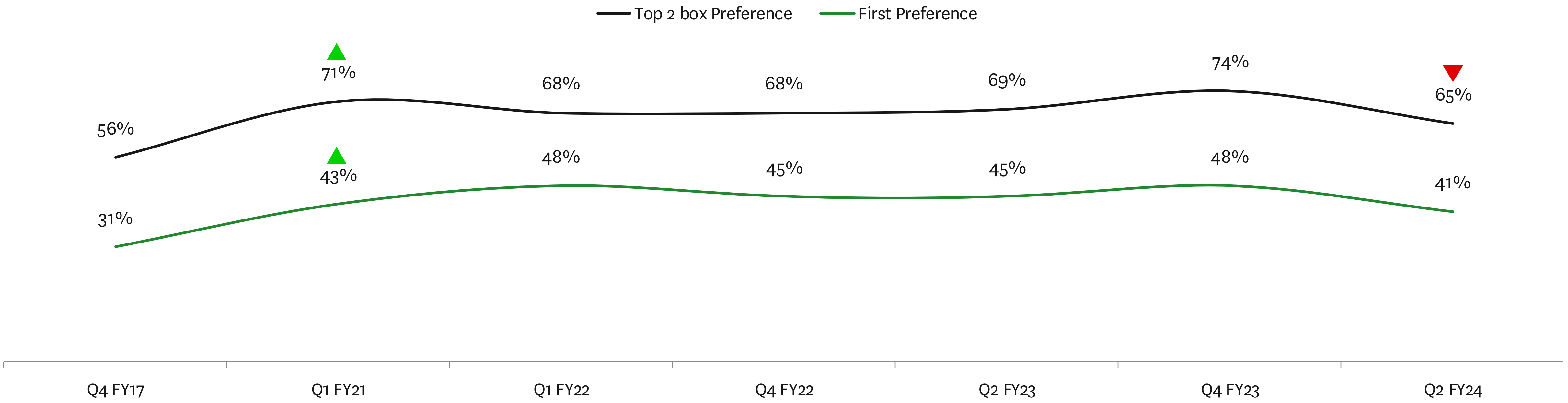
Change in rank by at least two places compared to previous wave

Sample sizes: Q4 FY23 n = 300, Q2 FY24 n = 299
% selected destination in their top five preferred destinations
Q "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"

Among ACs, preference for New Zealand has recently softened but remains relatively stable over the long-term

New Zealand as a #1 Preferred Destination

% Active Considerers



Significantly higher / lower than previous wave at 95%

Sample sizes: Q4 FY17 n = 500 Q1 FY21 n = 301, Q1 FY22 n = 300, Q4 FY22 n = 300, Q2 FY23 n = 300, Q4 FY23 n = 300, Q2 FY24 n = 299

Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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

NZ 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 examples:

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

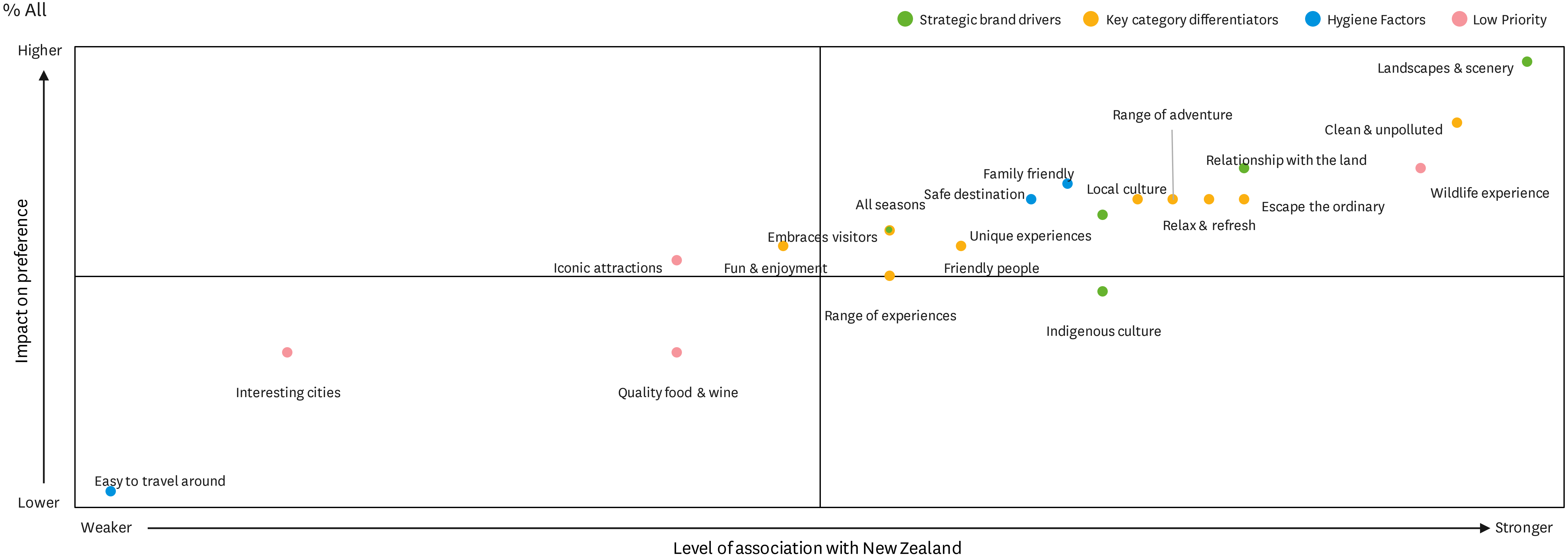
Shorthand	Full wording
Affordable activities	Things to see and do are affordable
Affordable to fly to	It's affordable to fly to this destination
All seasons	Suitable for a holiday all year round
Clean & unpolluted	The environment there is clean and unpolluted
Easy to travel around	It's easy to travel 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 performs strongly on the high impact drivers, most notably landscapes and scenery

Brand Associations of New Zealand x Impact on preference

% All



Sample size: South Korea Q2 FY24 n = 299
Question: "Which destinations, if any, do you associate with this statement?"
'Affordable to fly to' and 'Affordable activities" drivers not included due to low impact and level of association
'Escape the ordinary' driver re-worded to 'A place you can escape from the ordinary in FY24'
'Excitement', 'Amazing beaches' and 'Exploration' drivers added in FY24 and not included in impact analysis

New Zealand is in a strong position with several strategic brand strengths; however, to strengthen its competitive position further, the focus should be on building perceptions of its stunning landscapes, friendly and welcoming people and the range of experiences on offer

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)

	Brand associations	New Zealand	Australia	Hawaii	Japan	Switzerland	Canada
Strategic Brand Drivers	Landscapes & scenery	102	107	91	42	146	110
	Relationship with the land	107	95	97	75	91	102
	Unique experiences	106	93	89	75	113	108
	Embraces visitors	101	109	91	80	84	121
	Indigenous culture	112	111	100	77	41	71
	Invites exploration	111	113	80	45	99	97
Key Category Differentiators	Clean & unpolluted	107	101	83	54	145	86
	Relax & refresh	104	90	111	55	136	92
	Range of adventure	108	122	89	52	79	92
	Escape the ordinary	99	112	99	68	133	87
	Local culture	103	107	104	100	71	80
	All seasons	101	94	118	83	93	96
	Friendly people	99	75	106	131	94	111
	Fun & enjoyment	97	98	115	116	97	72
	Range of experiences	93	86	102	119	133	113
	Amazing beaches	104	134	122	53	25	90

Actions for TNZ:

Strengths:

- Relationship with the land
- Unique experiences
- Indigenous culture
- Invites exploration
- Clean and & unpolluted
- Range of adventure

Drivers to dial up:

- Landscapes and scenery
- Embraces visitors
- Friendly people
- Range of experiences

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Sample size: Q2 FY24 n = 299
Question: "Which destinations, if any, do you associate with this statement?"
'Exploration' driver added in FY24 and not included in impact analysis

Relative weakness | 100 | *Relative strength*

Heat map shading is across rows, i.e. compares attributes within each country

NEW ZEALAND TOURISM

100% PURE NEW ZEALAND

Additional focus needs to be on strengthening perceptions that New Zealand is a safe and family friendly destination that is easy to travel around

Relative brand positioning for Hygiene Factors and Low Priority

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

	Brand associations	New Zealand	Australia	Hawaii	Japan	Switzerland	Canada
Hygiene Factors	Family friendly	96	95	98	105	107	118
	Safe destination	93	97	91	128	106	118
	Easy to travel around	86	54	87	253	113	97
	Affordable to fly to	80	48	57	401	51	62
	Affordable activities	76	57	83	346	61	87
	Excitement	99	84	90	87	156	116
Low Priority	Wildlife experience	119	142	62	28	33	94
	Iconic attractions	88	107	98	121	97	138
	Interesting cities	84	93	90	169	133	106
	Quality food & wine	97	114	100	76	105	108

Actions for TNZ:

Strengths:

- Wildlife experience

Drivers to dial up:

- Family friendly
- Safe destination
- Easy to travel around
- Affordable to fly to
- Affordable activities
- Iconic attractions
- Interesting cities

Sample size: Q2 FY24 n = 299
Question: "Which destinations, if any, do you associate with this statement?"
'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 attributes within each country

To move people along the funnel, tactical communications need to address key knowledge gaps around the weather and the length of time required to travel to and around New Zealand

Top ten knowledge gaps

% Active Considerers | Q2 FY24

	What do ACs want to know more about before choosing New Zealand?	Q2 FY24	Q4 FY23
1	What the weather is like	38%	37%
2	The length of time required to fly to New Zealand	37%	32%
3	How safe it is from crime	35%	29%
4	How long it takes to travel between the main attractions	32%	26%
5	How easy it is to travel around	30% ▲	21%
6	The length of time needed to experience New Zealand properly	25%	27%
7	How safe it is to participate in adventure activities	21%	19%
8	How welcoming the locals are	20%	19%
9	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	19%	18%
10	Whether there is a broad enough variety of things to see and do	17%	16%

Ranks higher now than six months ago ▲▼ *Significantly higher / lower than previous wave at 95%*

Sample size: Q4 FY23 | Q2 FY24 n = 300 | 299
Question: "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Surfacing information about the weather will be relevant to ACs across all stages of the funnel but messaging around the length of time to fly and get around New Zealand will yield the greatest impact among planners

Top ten knowledge gaps, by funnel stage

% Active Considerers | Q2 FY24

Caution: Low base size

	What do ACs want to know more about before choosing New Zealand?	Dreaming	Planning	Booking
1	What the weather is like	38%	44%	35%
2	The length of time required to fly to New Zealand	34%	48%	37%
3	How safe it is from crime	34%	29%	39%
4	How long it takes to travel between the main attractions	36%	29%	27%
5	How easy it is to travel around	33%	29%	25%
6	The length of time needed to experience New Zealand properly	24%	26%	27%
7	How safe it is to participate in adventure activities	23%	18%	20%
8	How welcoming the locals are	20%	16%	23%
9	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	12%	29% ▲	25%
10	Whether there is a broad enough variety of things to see and do	19%	12%	18%

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

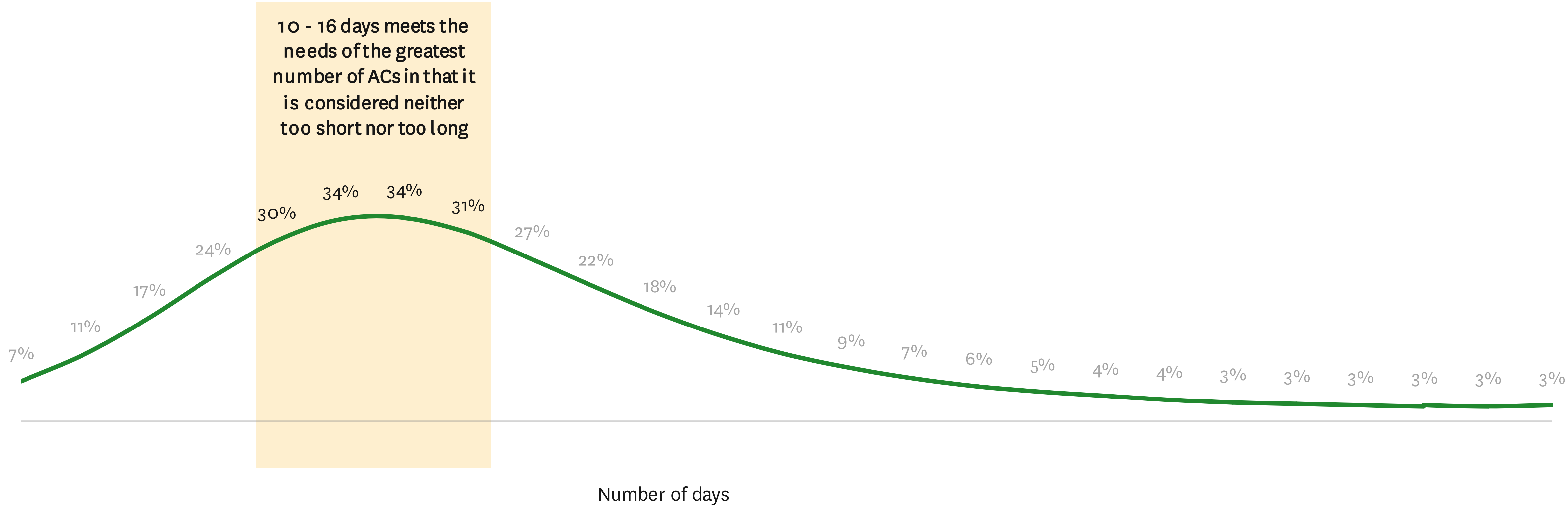
Sample size Dreaming n = 157, Planning n = 50, Booking n = 92

Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Promoting holiday packages between 10 – 16 days will cater to the broadest range of ACs, ensuring maximum appeal

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

% Active Considerers | Q2 FY24



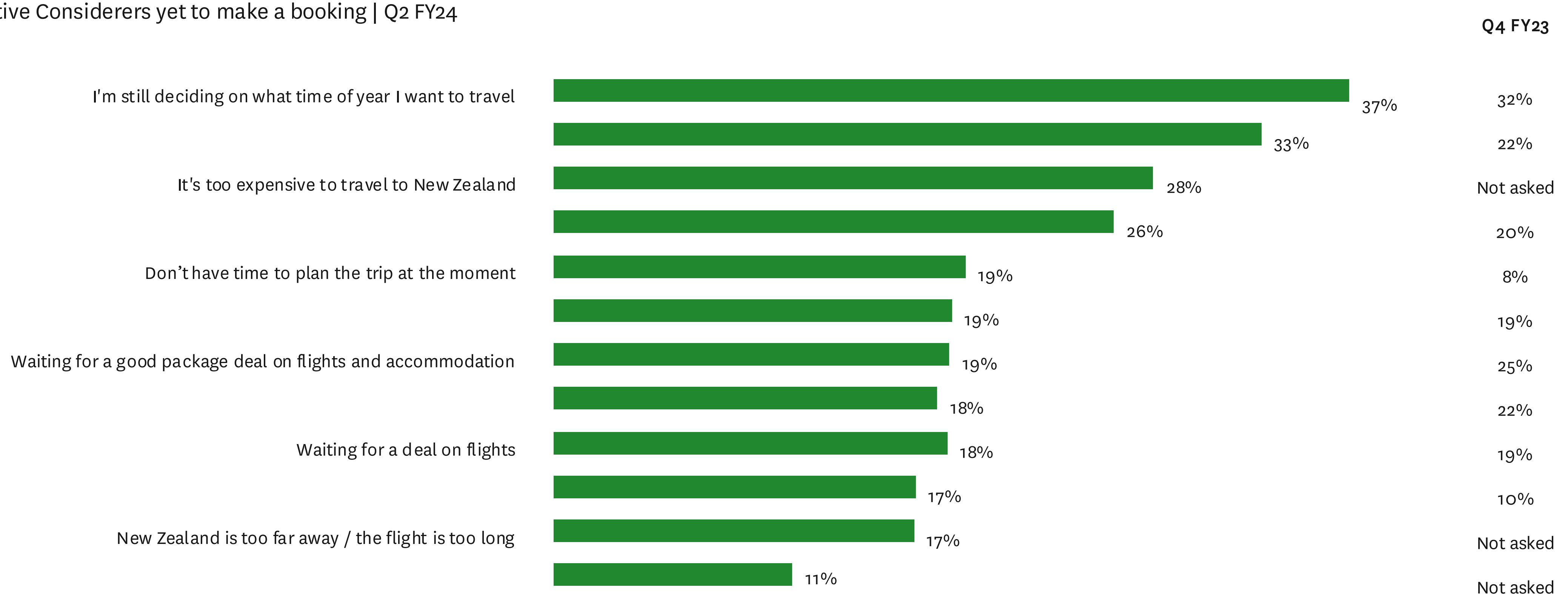
Sample size: Q2 FY24 n = 299

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 prompt ACs to book by providing advice on when time of the year to travel, and working with trade partners to offer bundled package deals on flights and accommodation

Barriers to booking holiday to New Zealand

% Active Considerers yet to make a booking | Q2 FY24



Significantly higher / lower than previous wave at 95%

Sample size: Q4 FY23 | Q2 FY24 n = 142 | 139

Q "What is stopping you from making a booking?"

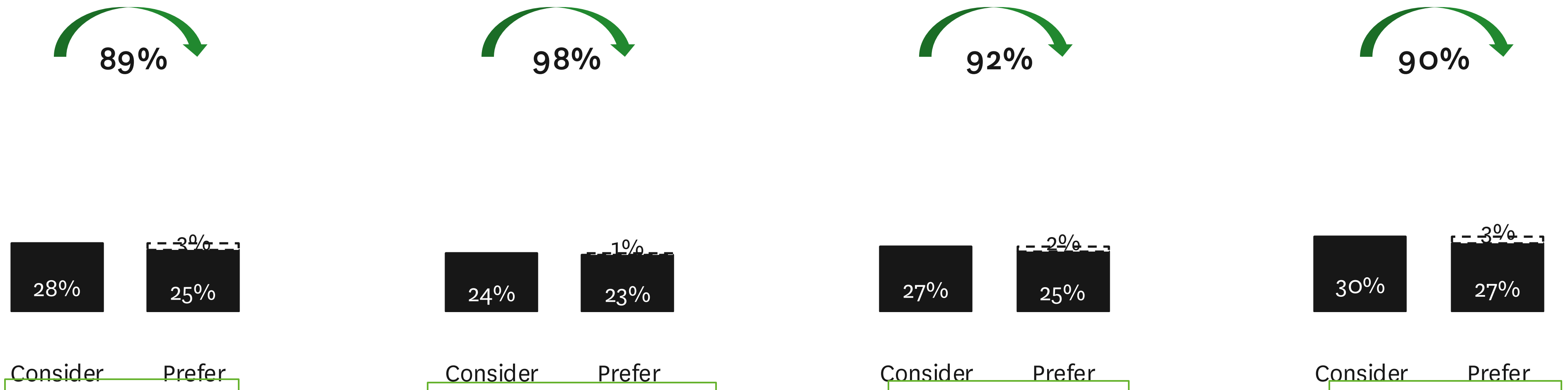
There is a strong opportunity to drive seasonal arrivals as consideration and preference are broadly similar across all seasons

Seasons – consideration & preference

% Active Considerers | Q2 FY24

Conversion of consideration to preference

Opportunity



Holiday Arrivals data	Off-peak	Peak	Off-peak	Off-peak
	Sep- Nov 2019: 15K	Dec 2018 – Feb 2019: 25K	Mar – May 2019: 13K	Jun – Aug 2019: 9K
	Sep- Nov 2023: 13K	Dec 2022 – Feb 2023: 9K	Mar – May 2023: 8K	Jun – Aug 2023: 6K

Sample size n=299

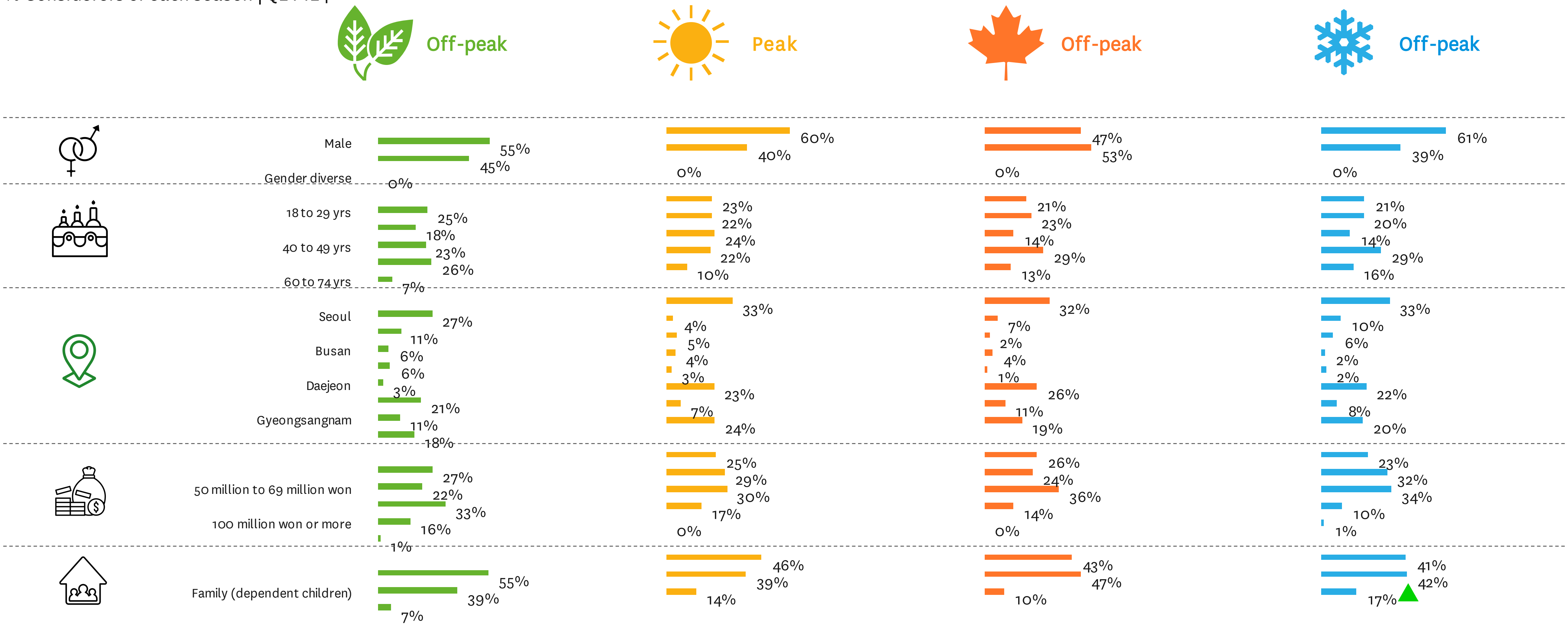
Spring 'Off-peak' refers to the period Sep, Oct, Nov; 'Peak' refers to the period Dec, Jan, Feb; Autumn 'Off-peak' refers to the period Mar, Apr, May; 'Off peak' refers to the period Jun, Jul, Aug

Stats NZ International Visitor Arrivals Dec 2018 – Nov 2019 and Dec 2022 – Feb 2023

Considerers of the various seasons are very similar in terms of their demographic profile

Profile of Seasonal Considerers

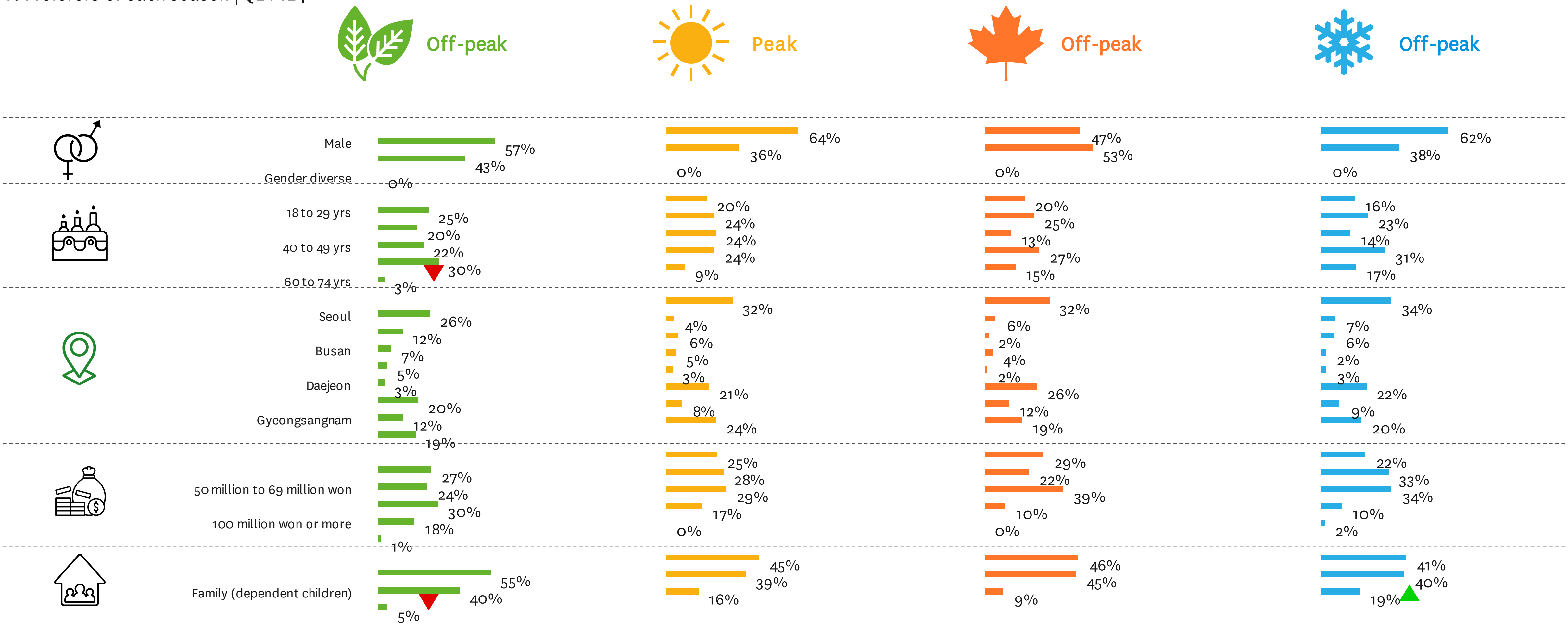
% Considerers of each season | Q2 FY24



The demographic profile of preferers of the various seasons are very similar, although spring preferers are less likely to be older

Profile of Seasonal Preferers

% Preferers of each season | Q2 FY24



SINGAPORE

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

Active Considerer journey funnel – Singapore

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 (S$2,500 per person on a holiday to New Zealand)

Online population, 18-74 years of age[1] (3.7m)

66%

Find New Zealand highly appealing as a holiday destination, and...

2.4m

76%

Would seriously consider visiting in the next three years, and...

1.9m

96%

New Zealand is a preferred destination for their next holiday, and...

1.8m

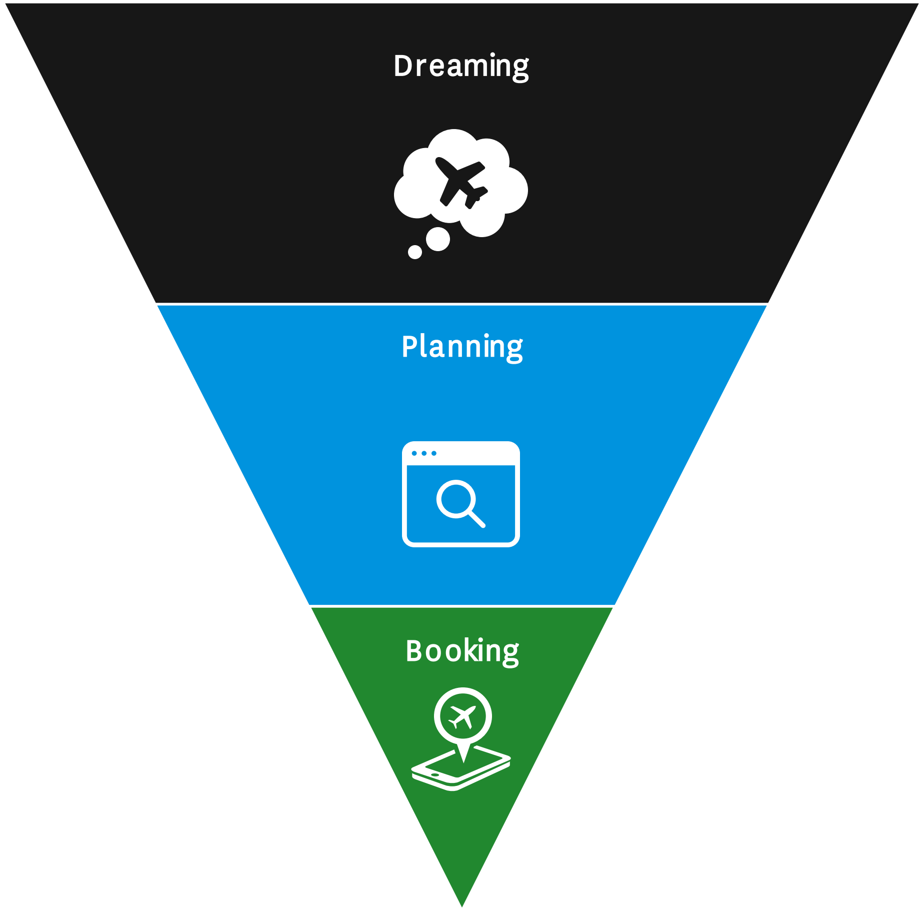
68%

Willing to spend at S$2500 per person on a holiday to New Zealand[2]

1.2m

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

Journey funnel to New Zealand – Singapore



	Active Considerers (1.2m)	Size (%) AC's	Size (%) Priority Mindset Group
Dreaming	0.5m	42%	38%
Planning	0.2m	13%	15%
Booking	0.5m	45%	47%

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

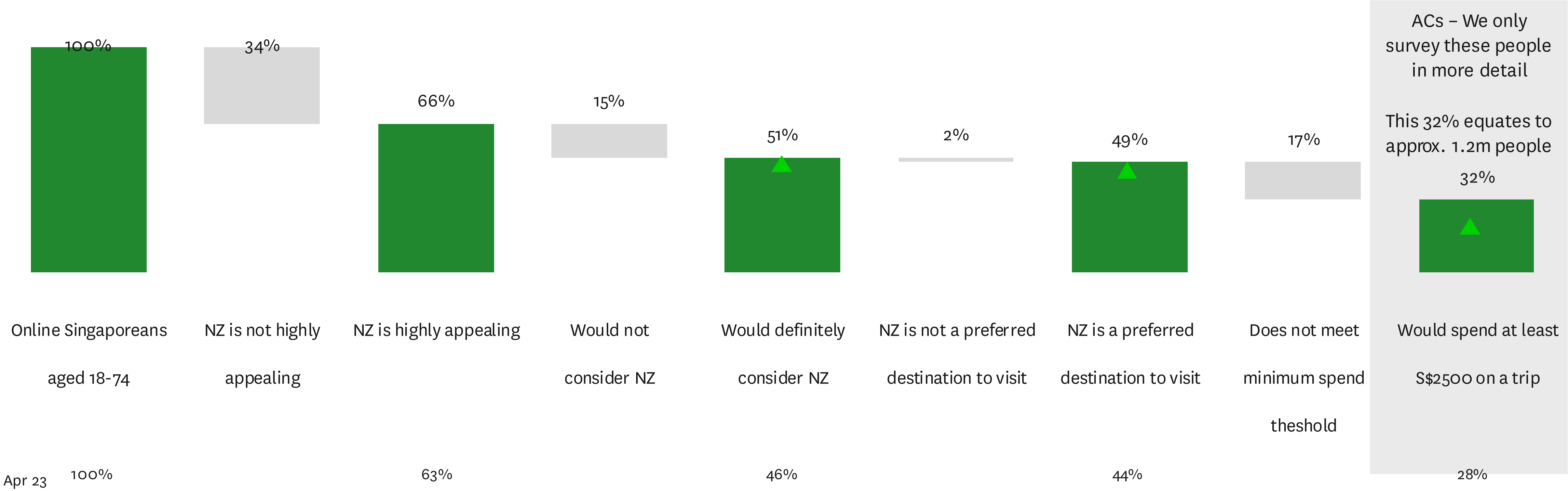
▲▼ *Significantly higher / lower than non-priority group*

Sample sizes: ACs Oct 23 n = 301, Priority Mindset Group n=76

The size of the opportunity in Singapore is growing, with the AC incidence increasing to 32% (approximately 1.2 million people)

Qualifying criteria for defining ACs

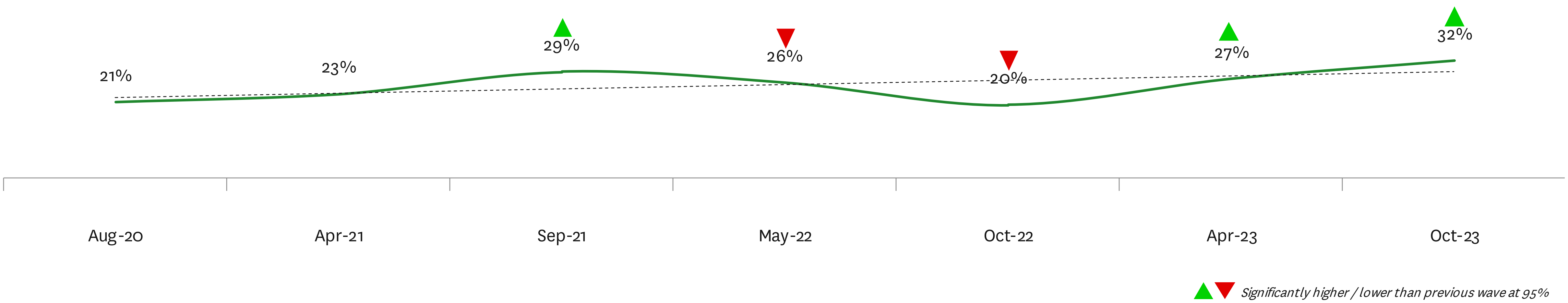
AC Monitor | Q2 FY24 | % Online users aged 18-74



Significantly higher / lower than previous wave at 95%

The incidence of ACs has rebounded from the dip in Oct 22 and, at 32%, is now at the highest levels seen in Singapore

Incidence of ACs
% Online users aged 18-74



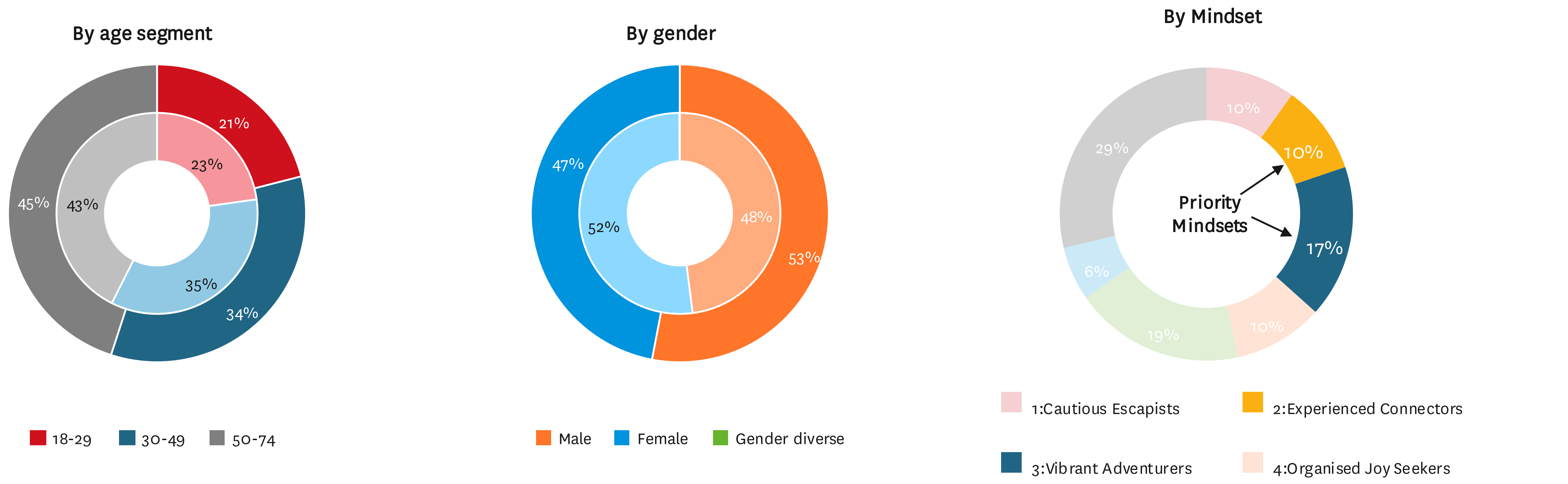
Sample sizes: Aug 20 n = 2,139 | Apr 21 n = 1,372 | Sep 21 n = 1,780 | May 22 n = 2,053 | Oct 22 n = 1,617 | Apr 23 n = 1,162 | Oct 23 n = 982

The global priority mindsets, Experienced Connectors and Vibrant Adventurers, make up 27% of Singapore's AC pool

Profile of Active Considerers

% Active Considerers vs % Non-Active Considerers | Q2 FY24

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



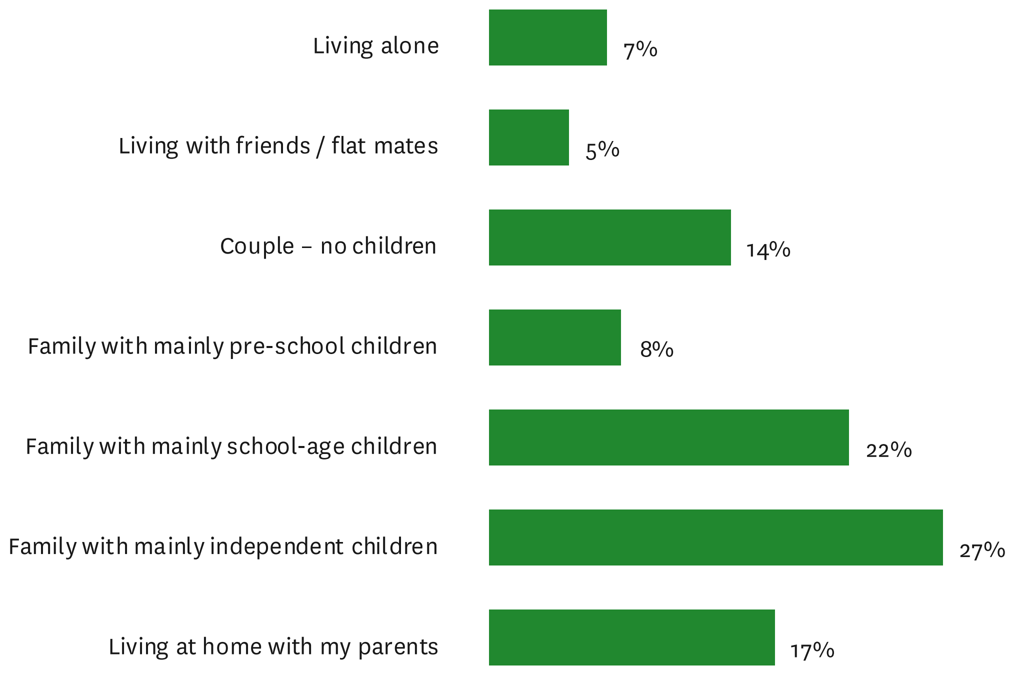
Significantly higher / lower than non AC's

Sample sizes: ACs n = 306 | Non ACs n = 673

The majority of ACs in Singapore live with family members

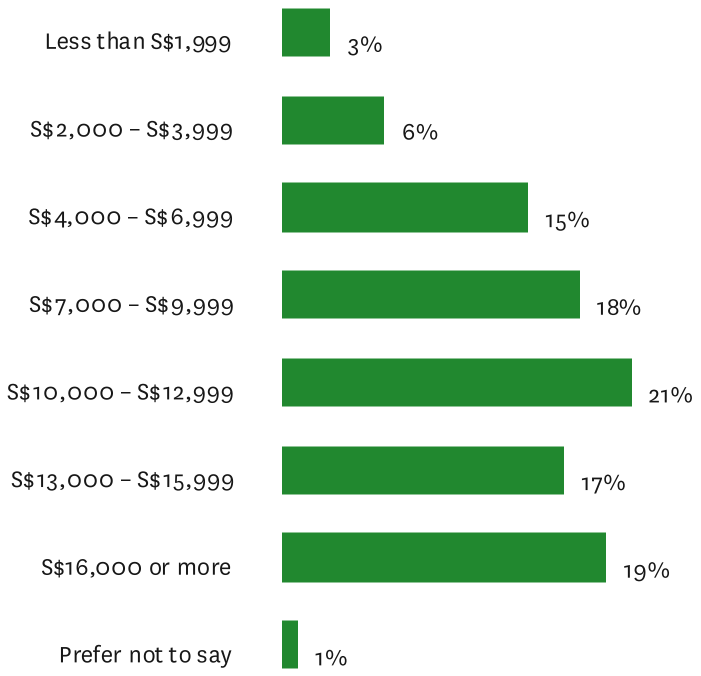
Household Composition

% Active Considerers | **Q2 FY24**



Household Income

% Active Considerers | Oct 23

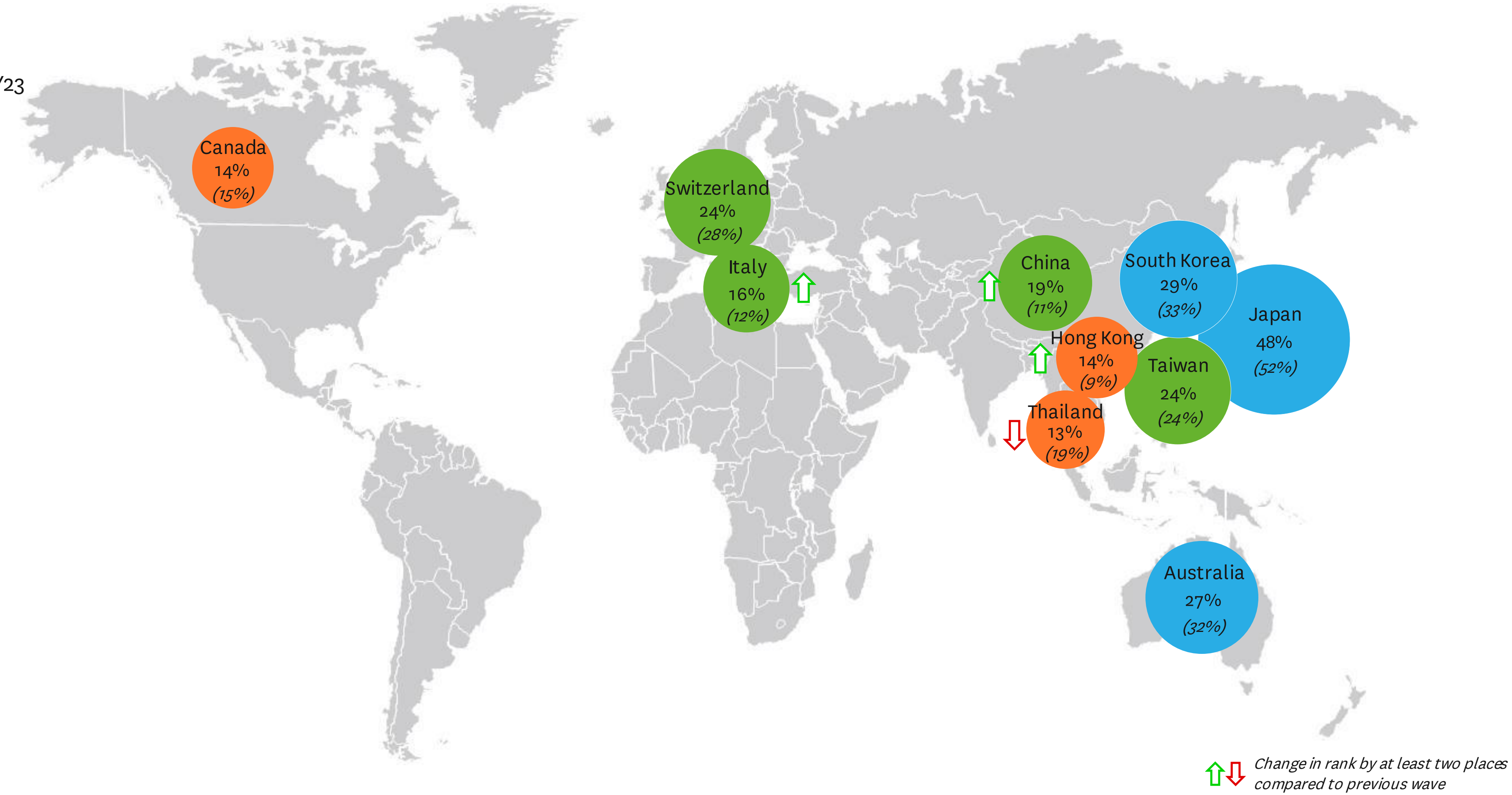


1. Sample size: n = 301
2. Q: "Which of these best describes your household?"
3. Q: "What is your total monthly household income?"

Japan remains New Zealand's top competitor by far, followed by South Korea and Australia

Top ten competitor set for ACs[1]

% Active Considerers | Q2 FY24 vs. Q4 FY23

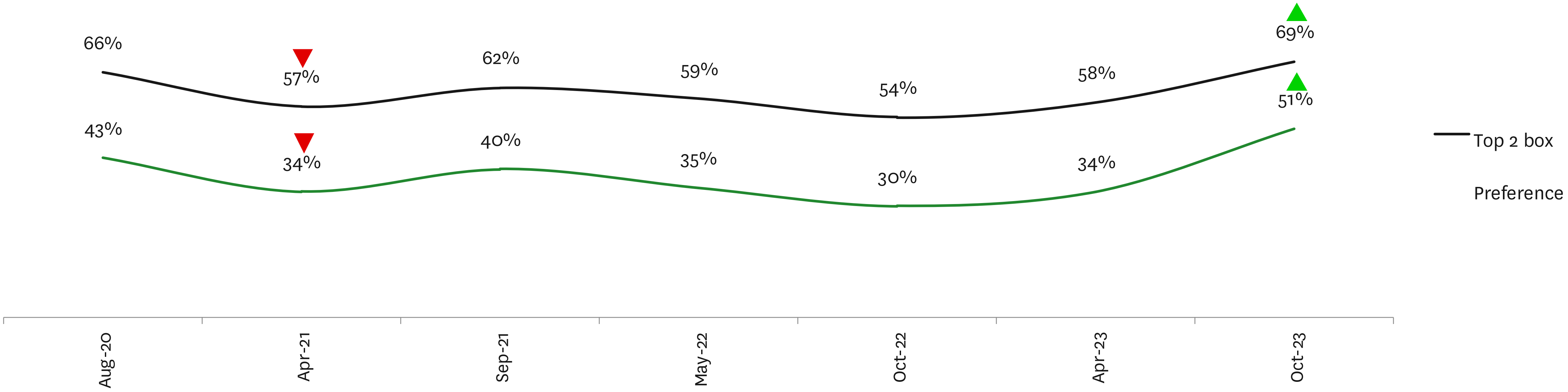


Sample size: ACs Apr 23 | Oct 23 n = 302 | 301
% selected destination in their top five preferred destinations
Figures in brackets denote previous 6 months
Question "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"

Preference for New Zealand has recently strengthened, surpassing historical levels

New Zealand as a #1 Preferred Destination

% Active Considerers | Over time



Significantly higher / lower than six month prior at 95%

Sample sizes: ACs Aug 20 | Apr 21 | Sep 21 | May 22 | Oct 22 | Apr23 | Oct 23 n = 403 | 300 | 500 | 499 | 300 | 302 | 301
Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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 NZ 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 examples:

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 preforms strongly on most of the high impact drivers, although perceptions of its friendly people need to improve

Brand Associations of New Zealand x Impact on preference

% All markets

Sample size: Singapore Oct 23 n = 301
Question: "Which destinations, if any, do you associate with this statement?"
'Affordable to fly to' driver not included due to low impact and level of association
'Escape the ordinary' driver re-worded to 'A place you can escape from the ordinary in FY24'
'Excitement', 'Amazing beaches' and 'Exploration' drivers added in FY24 and not included in impact analysis

KANTAR

100% PURE NEW ZEALAND

Relative to competitors, New Zealand's strengths lie in its unique landscapes, culture and being a place to explore and escape; however, there is room to improve perceptions of the unique experiences and range of adventures on offer

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)

	Brand associations	New Zealand	Japan	South Korea	Australia	Taiwan	Switzerland
Strategic Brand Drivers	Landscapes & scenery	110	105	64	91	57	113
	Embraces visitors	100	96	89	90	114	110
	Unique experiences	96	109	94	95	77	128
	Indigenous culture	106	95	96	101	99	78
	Relationship with the land	96	120	79	96	133	74
	Invites exploration	109	94	75	107	76	95
Key Category Differentiators	Clean & unpolluted	91	120	85	97	108	113
	Fun & enjoyment	96	97	108	102	103	107
	Range of experiences	109	75	76	117	80	116
	Range of adventure	93	106	102	92	121	110
	Relax & refresh	105	99	105	77	64	121
	Friendly people	109	90	77	92	73	122
	Escape the ordinary	110	96	78	86	87	96
	All seasons	96	107	104	102	88	104
	Local culture	106	83	83	108	75	124
	Amazing beaches	110	76	70	157	78	73

Actions for TNZ:

Strengths:

- Escape the ordinary
- Amazing beachs
- Landscapes & scenery
- Invites exploration
- Range of experiences

Drivers to dial up:

- Range of adventure
- Clean & unpolluted
- Unique experiences

Sample size: Singapore Oct 23 n = 301
Question: "Which destinations, if any, do you associate with this statement?"
'Exploration' 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 is perceived to be a friendlier destination than its top competitors but is not as easy to travel around or as affordable to fly to as other destinations

Relative brand positioning for Hygiene Factors and Low Priority

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

	Brand associations	New Zealand	Japan	South Korea	Australia	Taiwan	Switzerland
Hygiene Factors	Family friendly	123	67	50	149	50	78
	Safe destination	97	102	97	98	113	97
	Easy to travel around	85	119	108	100	119	107
	Affordable activities	97	97	119	73	177	59
	Affordable to fly to	88	105	138	89	171	62
	Excitement	94	110	101	101	97	106
Low Priority	Wildlife experience	106	87	96	98	84	109
	Iconic attractions	94	99	113	102	127	88
	Quality food & wine	85	124	109	93	133	94
	Interesting cities	93	111	120	93	112	87

Actions for TNZ:

Strengths:

- Family friendly
- Wildlife experience

Drivers to dial up:

- Easy to travel around
- Affordable to fly to
- Quality food and wine
- Iconic attractions
- Interesting cities

Sample size: Singapore Oct 23 n = 301
Question: "Which destinations, if any, do you associate with this statement?"
'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

Tactical communications need to be addressing prevalent concerns for booking a holiday to New Zealand, most notably hygiene factors such as weather, safety, and ease of travel within New Zealand

Top ten knowledge gaps

% Active Considerers

	What do ACs want to know more about before choosing New Zealand?	Oct 23	Apr 23	Oct 22
1	What the weather is like	43%	41%	48%
2	How easy it is to travel around	36%	37%	41%
3	How welcoming the locals are	35%	28%	26%
4	The quality and variety of food and beverage options	33% ▲	24%	26%
5	How safe it is from crime	31%	25%	30%
6	How long it takes to travel between the main attractions	31%	31%	25%
7	The length of time required to fly to New Zealand	29%	31%	32%
8	How safe it is to participate in adventure activities	29%	27%	21%
9	What / where the recommended things to see and do are	29%	23%	24%
10	Whether there is a broad enough variety of things to see and do	26% ▲	16%	20%

Ranks higher now than six months ago

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

Sample size: Oct22 | Apr 23 | Oct 23 n = 300 | 302 | 301
Question: "Putting thoughts about costs 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 recommended to move ACs through the funnel: messages around weather, safety and the ease of traveling around New Zealand will have greater impact on Planners than Dreamers and Bookers

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	What the weather is like	38%	50%	44%
2	How easy it is to travel around	38%	42%	32%
3	How welcoming the locals are	36%	27%	37%
4	The quality and variety of food and beverage options	30%	34%	35%
5	How safe it is from crime	31%	37%	30%
6	How long it takes to travel between the main attractions	29%	40%	29%
7	The length of time required to fly to New Zealand	23%	38%	32%
8	How safe it is to participate in adventure activities	28%	38%	27%
9	What / where the recommended things to see and do are	30%	24%	29%
10	Whether there is a broad enough variety of things to see and do	21%	24%	32%

Ranks higher now than six months ago

Significantly higher / lower than comparison group at 95%

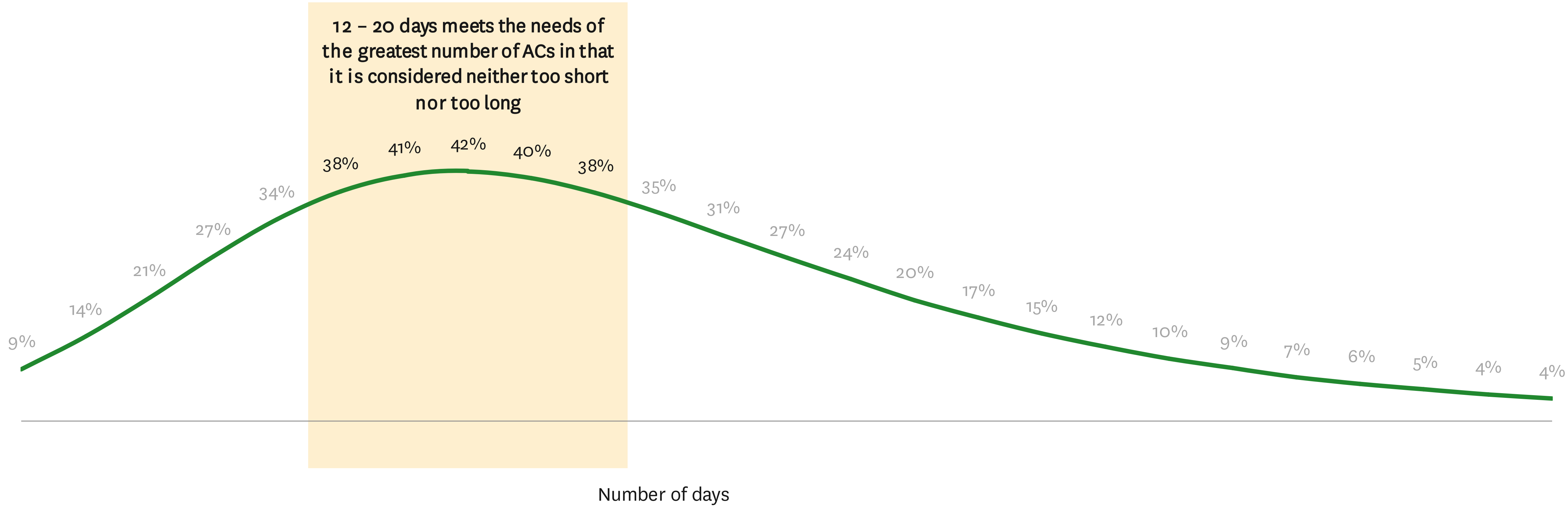
Sample size: Dreaming n = 127, Planning n = 40, Booking n = 134

Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Promoting holiday packages between 12 – 20 days will cater to the broadest range of ACs, ensuring maximum appeal

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

% Active Considerers | Q2 FY24



Sample size: Oct 23 n = 301

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 move ACs to the booking stage by working with trade partners to promote deals on flights and accommodation and assisting them to decide on when to visit New Zealand

Barriers to booking a holiday to New Zealand

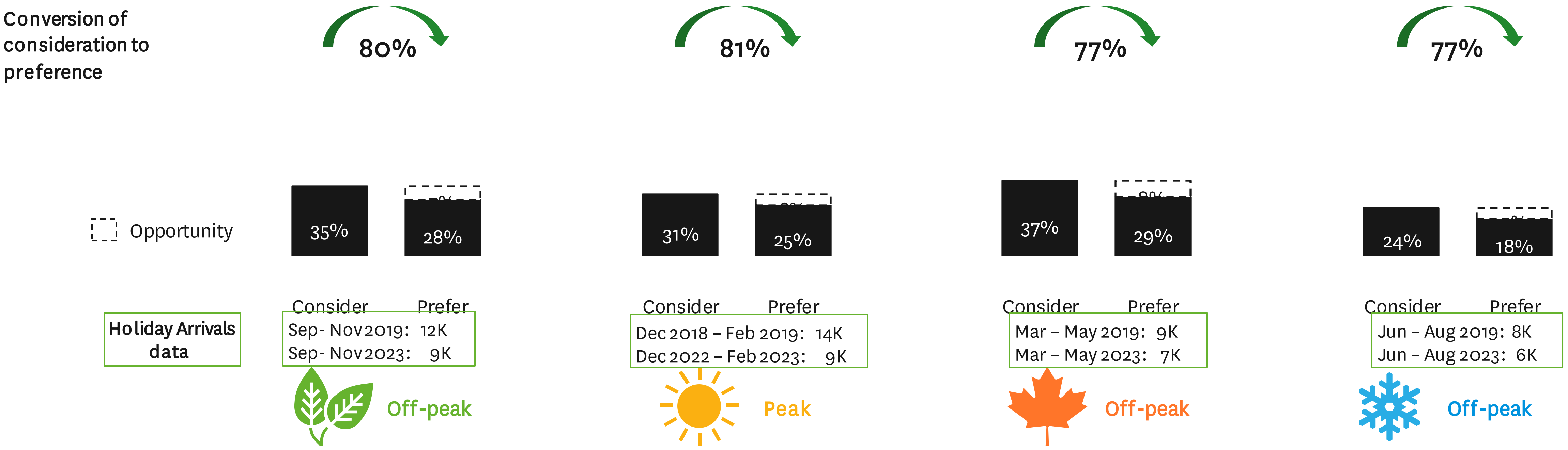
% Active Considerers | Q2 FY24

Sample size: Apr 23| Oct 23 n = 157 | 156
Question "What is stopping you from making a booking?"

Levels of consideration are broadly similar across summer and shoulder seasons presenting an opportunity to drive seasonal dispersal

Seasons – consideration & preference

% Active Considerers | Q2 FY24



Sample size n=301

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

Stats NZ International Visitor Arrivals Dec 2018 – Nov 2019 and Dec 2022 – Feb 2023

The demographic profile of considerers of each season varies, with summer considerers skewing towards males and higher income ACs and winter considerers skewing younger and lower income ACs

Profile of Seasonal Considerers

% Considerers of each season | Q2 FY24

	Spring (Off-peak)	Summer (Peak)	Autumn (Off-peak)	Winter (Off-peak)
Male	54%	63% ▲	53%	48%
Female	46%	37% ▼	47%	52%

	Spring (Off-peak)	Summer (Peak)	Autumn (Off-peak)	Winter (Off-peak)
18 to 29 yrs	25%	27%	20%	34% ▲
30 to 39 yrs	21%	19%	8% ▼	15%
40 to 49 yrs	18%	14%	20%	16%
50 to 59 yrs	14%	16%	20%	10%
60 to 74 yrs	22%	24%	31%	25%

	Spring (Off-peak)	Summer (Peak)	Autumn (Off-peak)	Winter (Off-peak)
Less than S$10,000	45%	31% ▼	39%	57% ▲
S$10,000 - S$15,999	33%	39%	43%	33%
S$16,000 or more	21%	29% ▲	18%	9% ▼
Prefer not to say	1%	1%	1%	1%

	Spring (Off-peak)	Summer (Peak)	Autumn (Off-peak)	Winter (Off-peak)
SINK / DINK	46%	41%	44%	45%
Family (dependent children)	37% ▲	35%	24%	30%
Family (independent children)	17% ▼	25%	32%	26%

1. Sample sizes: Spring n = 106 | Summer n = 90 | Autumn n = 112 | Winter n = 72

▲▼ *Significantly higher / lower than non-considerers of that season*

The demographic profile of spring preferers leans more heavily towards those aged 30-39 age group and families with dependent children while summer preferers skew towards higher incomes

Profile of Seasonal Preferers

% Preferers of each season | Q2 FY24

	Spring (Off-peak)	Summer (Peak)	Autumn (Off-peak)	Winter (Off-peak)
Male	55%	63%	52%	43%
Female	45%	37%	48%	57%
18 to 29 yrs	18%	23%	19%	30%
30 to 39 yrs	24% ▲	15%	6% ▼	18%
40 to 49 yrs	18%	15%	22%	10%
50 to 59 yrs	16%	19%	21%	11%
60 to 74 yrs	24%	29%	32%	32%
Less than S$10,000	41%	32%	38%	53%
S$10,000 - S$15,999	34%	36%	47%	38%
S$16,000 or more	24%	32% ▲	14%	7% ▼
Prefer not to say	1%	0%	1%	2%
SINK / DINK	42%	41%	44%	42%
Family (dependent children)	40% ▲	32%	22%	25%
Family (independent children)	19% ▼	27%	34%	34%

1. Sample sizes: Spring n = 180 | Summer n = 232 | Autumn n = 144 | Winter n = 105

▲▼ *Significantly higher / lower than non-preferers of that season*

1 Appendix

KANTAR

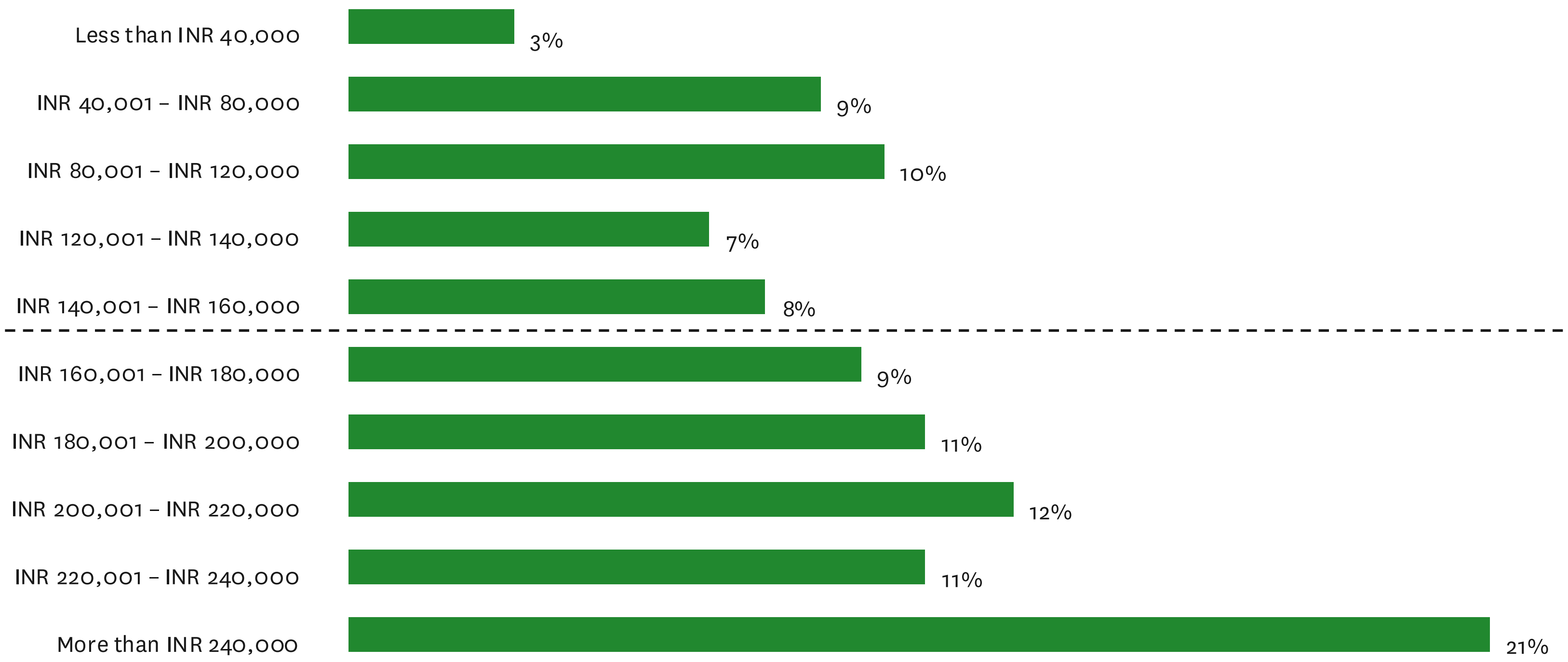
NEW ZEALAND TOURISM
100% PURE NEW ZEALAND
newzealand.com

Of those in India who identify New Zealand as a preferred destination, 37% do not meet the current spend threshold of INR 160,000

INDIA

Spend on holiday in New Zealand

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



Sample size: n = 639
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 30-49 years and live in Mumbai

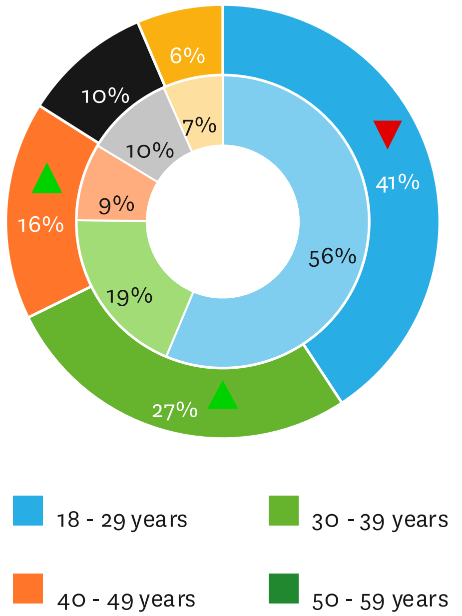
INDIA

Profile of those who find New Zealand appealing

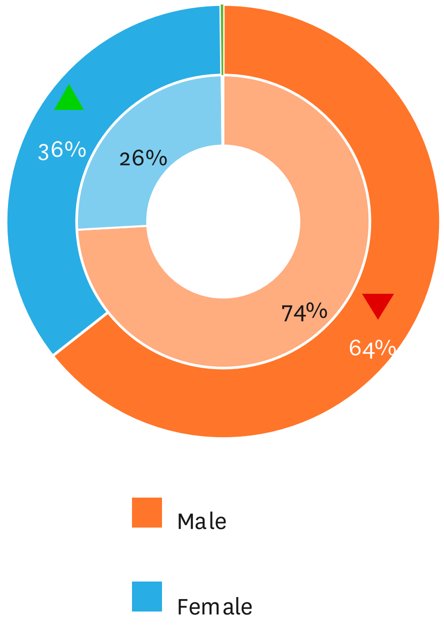
Those who find New Zealand appealing vs. not | Q2 FY24

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

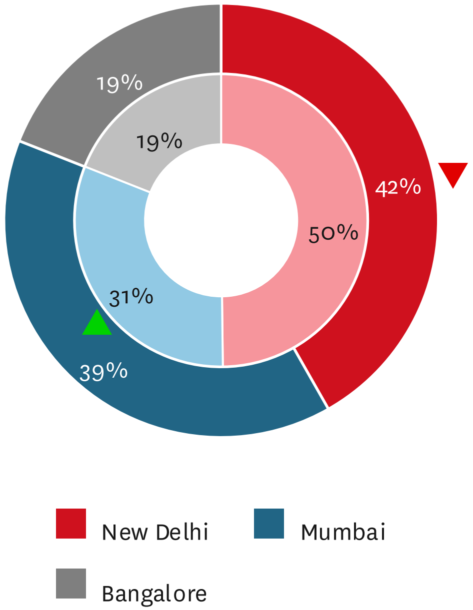
By age segment



By gender



By region



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

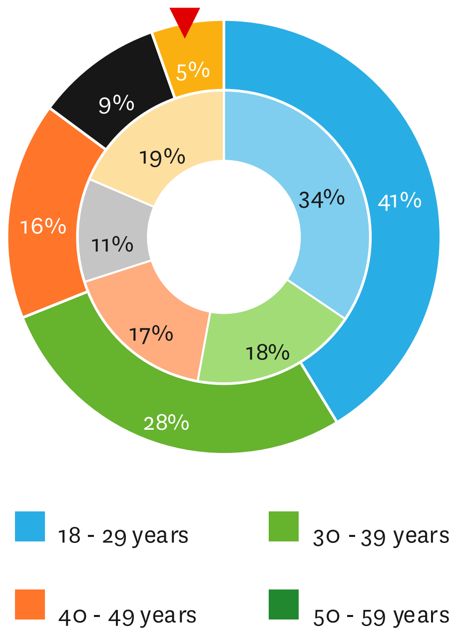
Sample size: Those who find New Zealand appealing n = 721 | Those who do not find New Zealand appealing n = 185

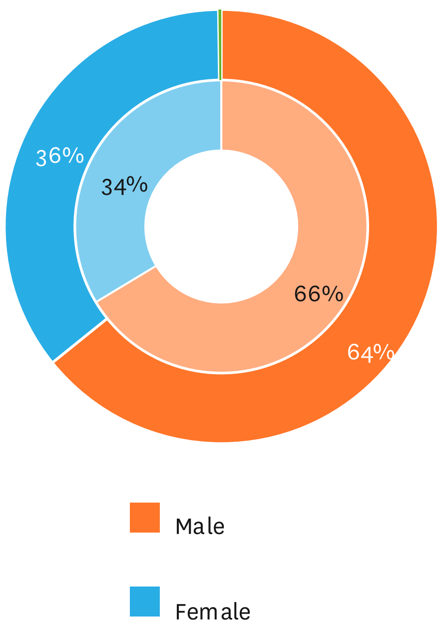
In India, the profile of considerers is more skewed towards those aged 18 – 39 years and Mumbai habitants than that of non-considerers

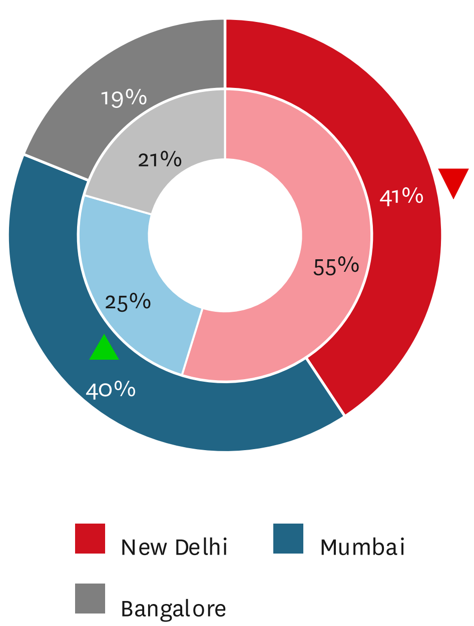
INDIA

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







Significantly higher / lower than those who would not seriously consider

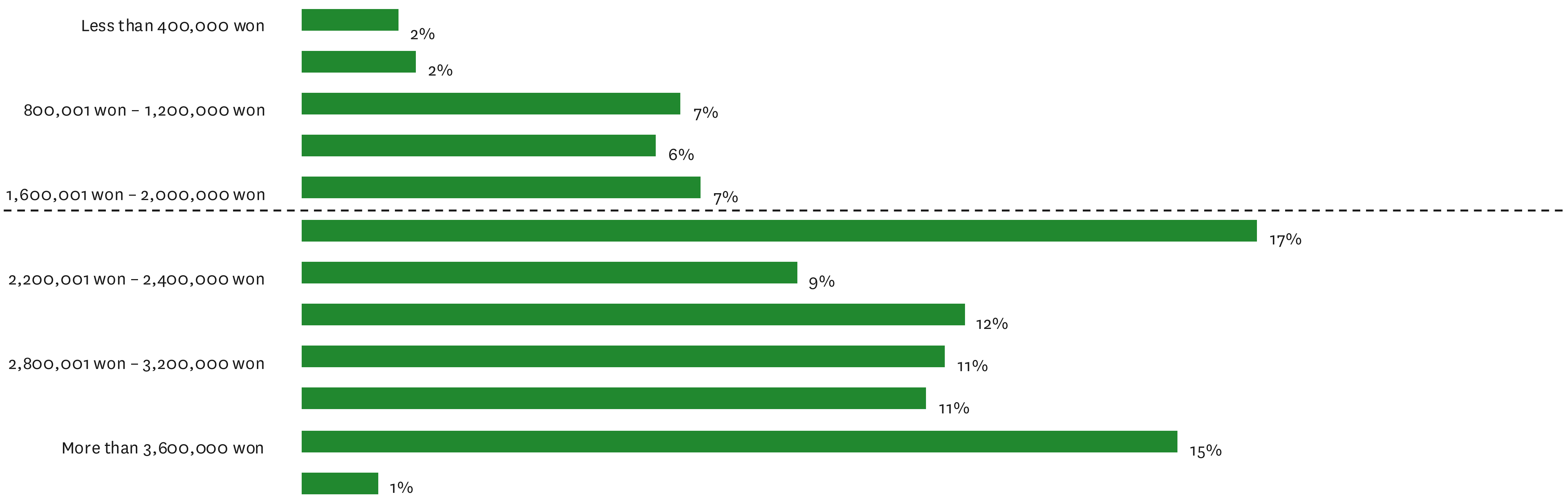
Sample size: Those who would seriously consider visiting New Zealand n = 661 | Those who would not seriously consider visiting New Zealand n = 60

Of those in South Korea who agree New Zealand is a preferred destination, 24% do not meet the current spend criteria of ₩2m

SOUTH KOREA

Spend on holiday in New Zealand

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



KANTAR

Sample size: n = 555
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"

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

Older travellers aged 50-74 years account for a larger proportion of those who find New Zealand appealing vs. those who do not

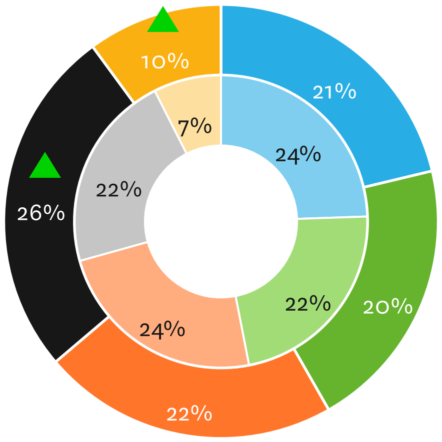
SOUTH KOREA

Profile of those who find New Zealand appealing

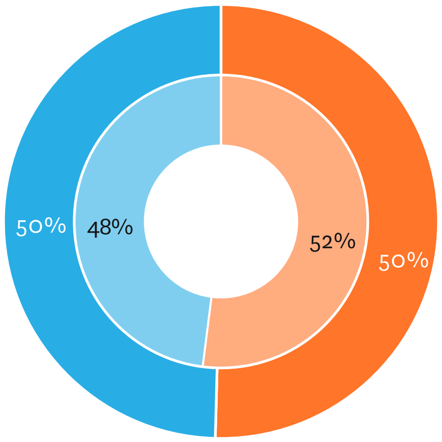
Those who find New Zealand appealing vs. not | Q2 FY24

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

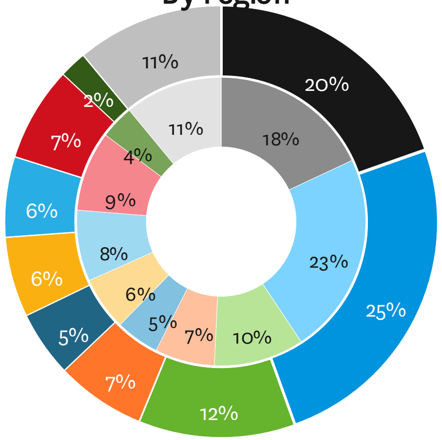
By age segment



By gender



By region



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

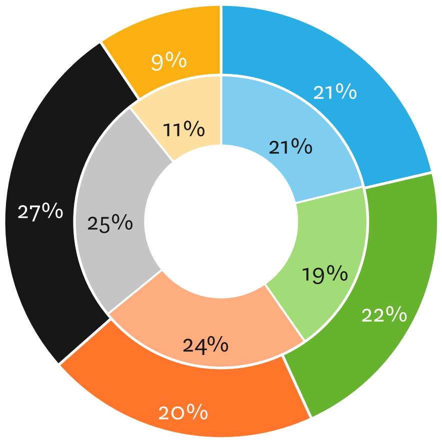
Compared to non-considerers, the profile of serious considerers is more skewed towards males and habitants of Seoul

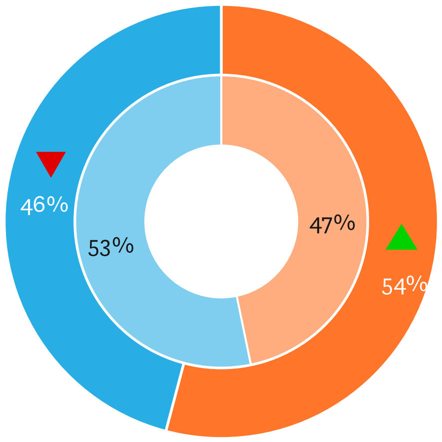
SOUTH KOREA

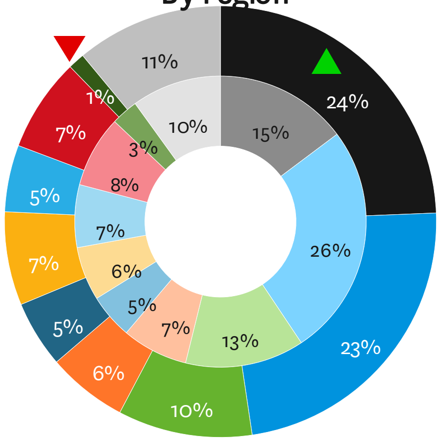
Profile of those who would seriously consider visiting New Zealand

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







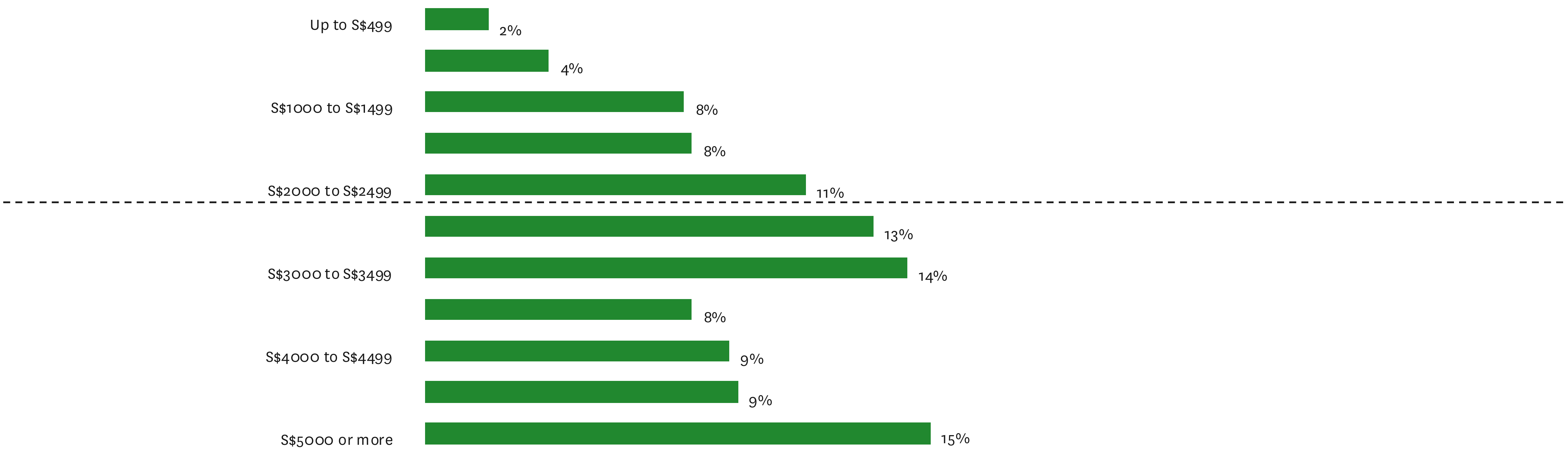
Significantly higher / lower than those who would not seriously consider

In Singapore, 33% of those who agree that New Zealand is a preferred destination do not meet the current spend threshold of S$2,500

SINGAPORE

Spend on holiday in New Zealand

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



Sample sizes: Oct 23 n = 459
Question "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"

KANTAR

100% PURE NEW ZEALAND

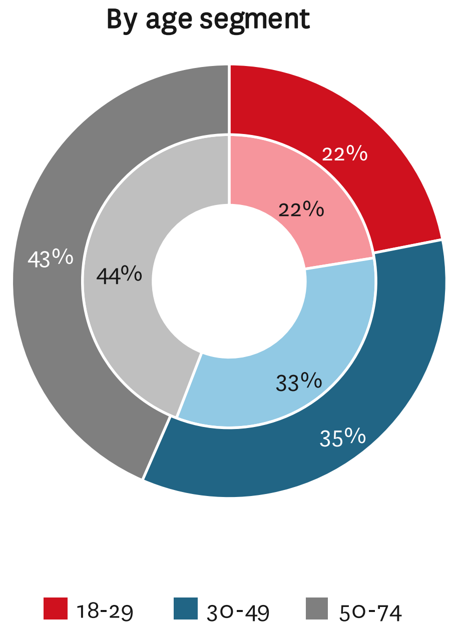
In Singapore, the profile of those who find New Zealand appealing is comparable to that of those who do not

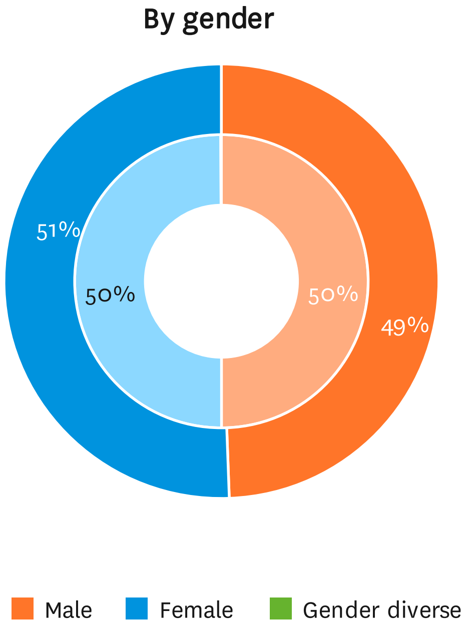
SINGAPORE

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





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

Sample sizes: Those who find New Zealand appealing n = 650 | Those who do not find New Zealand appealing n = 332

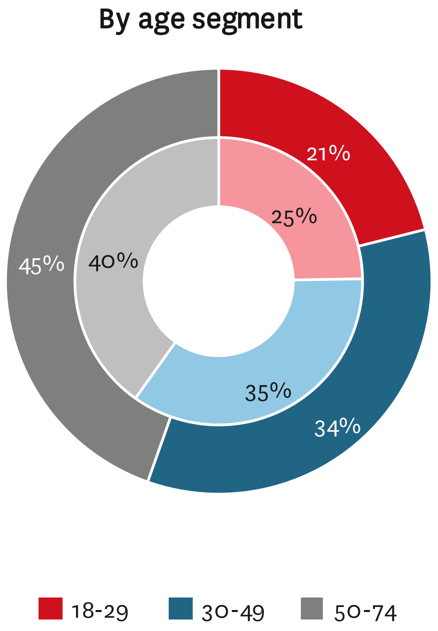
In Singapore, the profile of those who would seriously consider visiting New Zealand is more skewed towards male than those who would not consider

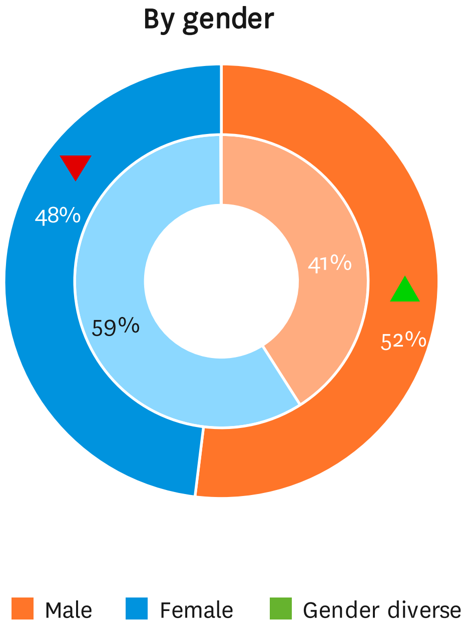
SINGAPORE

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



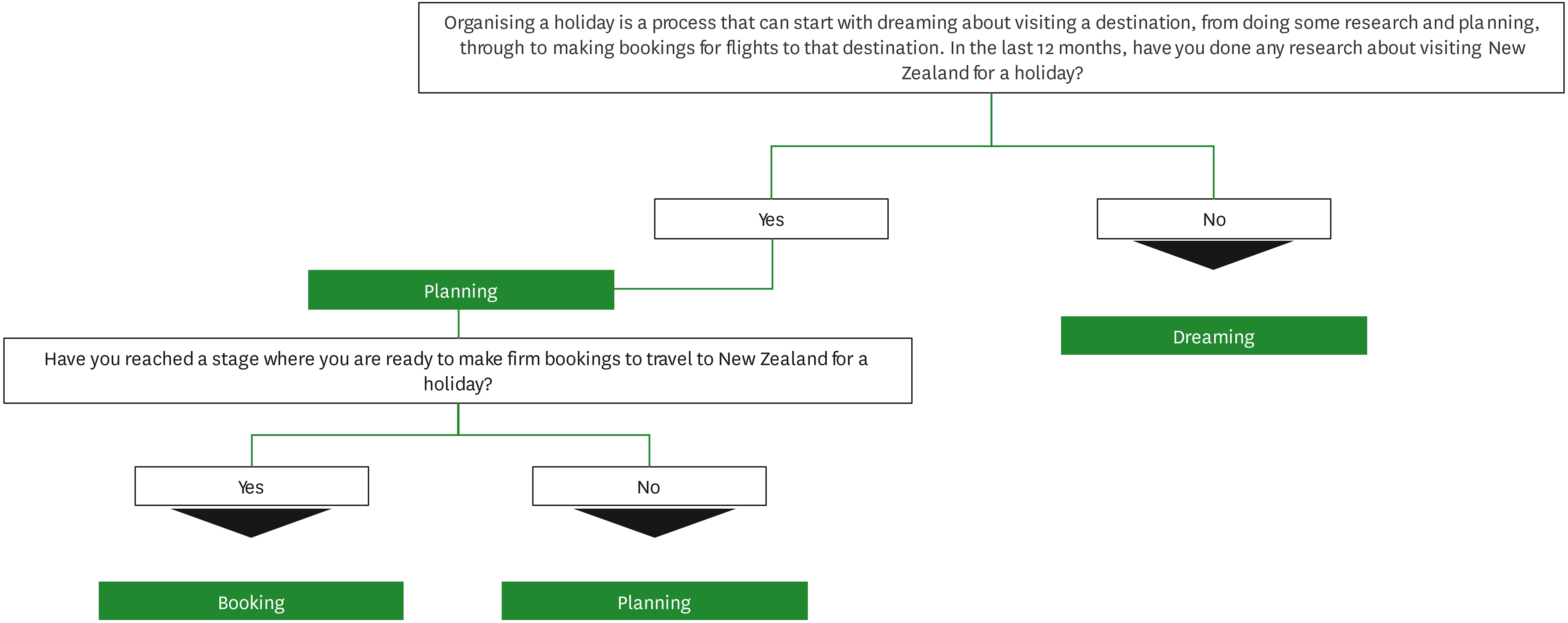


Significantly higher / lower than those who would not seriously consider

Sample sizes: Those who would seriously consider visiting New Zealand n = 491 | Those who would not seriously consider visiting New Zealand n = 158

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