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Active Considerer (AC) Monitor

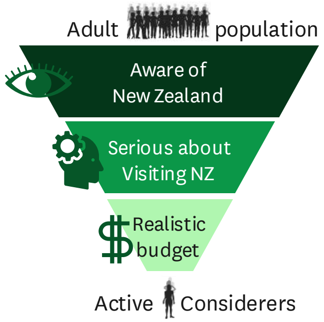
Australia (H1 FY24)

Report

January 2024

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

	Q4 FY23	Q2 FY24
Incidence of Active Considerers[1]	21%	23%
NZ as a #1 Preferred destination[2]	63%	61%
First	41%	40%
Second	22%	21%

Funnel[2]

	Q4 FY23	Q2 FY24
Dreaming	49%	44%
Planning	22%	20%
Booking	29%	36%

Brand areas to focus on[3]

Strengths	Need to dial up
Affordable to fly to	Excitement
Indigenous culture	Fun & enjoyment
Clean & unpolluted	Unique experiences
Relationship with the land	Range of experiences

Top 5 competitors[3]

(% selected destination in their top five preferred destinations)

Japan	Hawaii	Canada	UK	Italy
32%	25%	25%	23%	22%

Top 5 knowledge gaps[3]

1. How easy it is to travel around
2. What the weather is like
3. How welcoming the locals are
4. How long it takes to travel between the main attractions
5. What / where the recommended things to see and do are

	Consideration	Preference
Spring	34%	24%
Summer	41%	31%
Autumn	33%	19%
Winter	23%	14%

Key insights

- 3.9 million potential ACs, 36% of whom are ready to book - to convert these ACs, focus on strengthening their preference for New Zealand and addressing key concerns and barriers to booking
- Competitors include Japan, Hawaii and Canada
- Strategic brand messaging should focus on New Zealand's strengths in its indigenous culture and distinct relationship with the land, its range of adventure and relaxing opportunities
- Additionally, efforts should be on shaping perceptions of New Zealand as a destination that exudes fun and excitement and provides opportunities to explore and partake in diverse and unique experiences
- Tactical messages should address growing knowledge gaps around how easy New Zealand is to travel around and the length of time it takes to do so, as well as how welcoming New Zealand locals are
- While preference to visit New Zealand is strongest in the summer, there is an opportunity to drive seasonal dispersal – spring offers the greatest opportunity, particularly among priority mindsets
- Following a decline since the pandemic, the appeal of New Zealand and AC incidence are now trending directionally up. However, with an AC incidence of 23%, the AC pool remains much smaller than it was pre-pandemic (35% in Q2 FY20) and so efforts to grow the pool should remain a focus

AUSTRALIA


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

Active Considerer journey funnel – Australia

Active Considerers definition

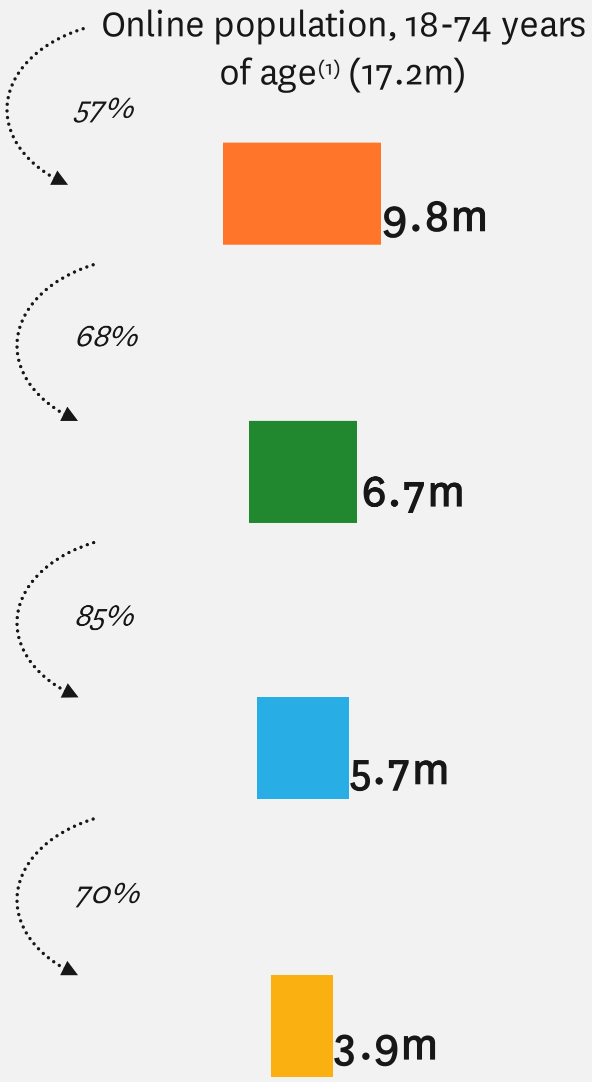
Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation and have a realistic budget for their visit ($1,500 AUD per person on a holiday to New Zealand).

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 $1,500 AUD per person on a holiday to New Zealand[2]



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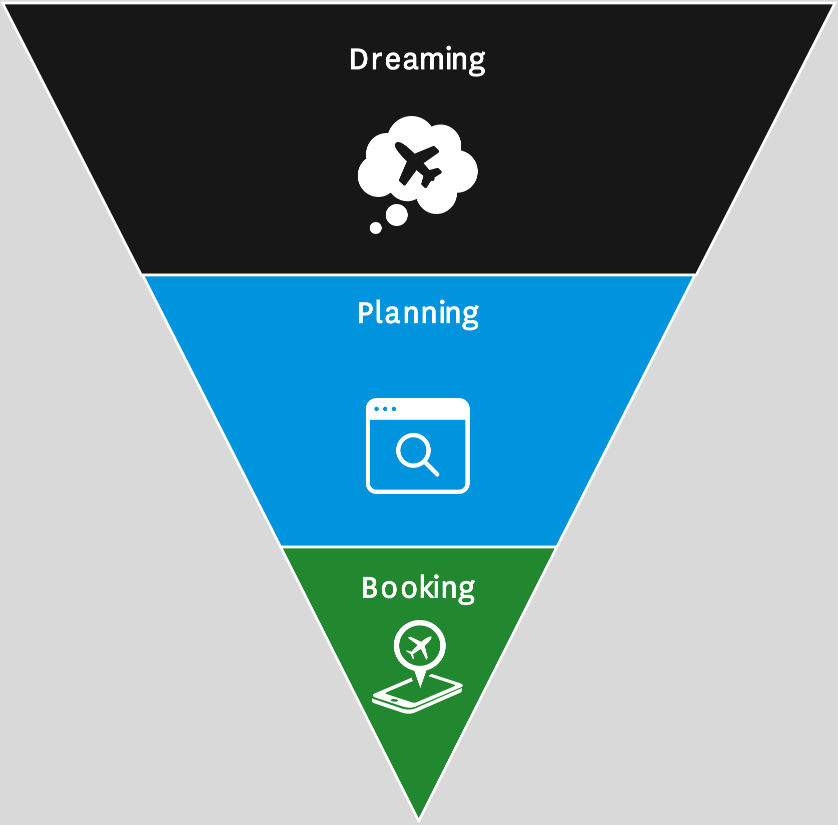
1. The approx. AC pool size is based on the online population estimates as of November 2023 and the AC incidence rate for the current five months
2. Including accommodation and daily expenses. Based off actual market data spend (IVS 2019)

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

Journey funnel to New Zealand - Australia



Book to come to NZ
Moment of Truth

Size (%)

Active Considerers (3.9m)	AC's	Priority Mindset Group
1.7m	44%	45%
0.8m	20%	26%
1.4m	36%	29% ▼

Comments

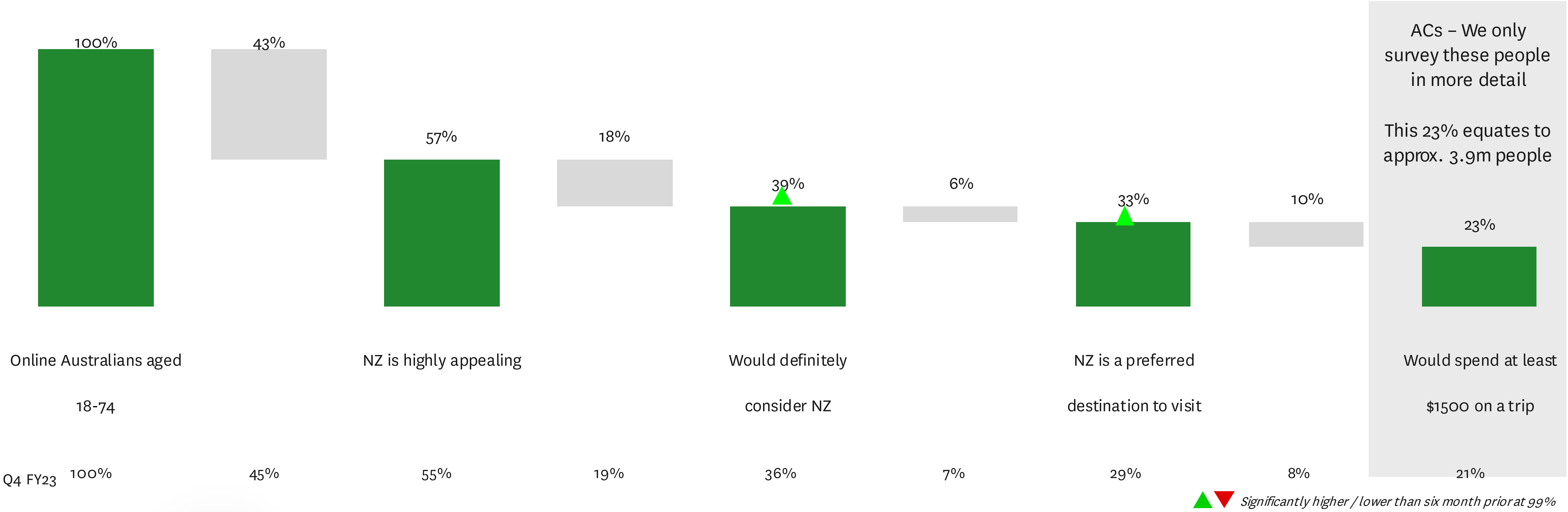
- ‘Ready to book’ is a claimed state of mind
- It doesn’t mean ACs will book a flight tomorrow if possible to do so, but that the commitment to visit New Zealand is there, and they feel confident enough to consider it a place they’d book travel to
- A number of extrinsic (e.g. price, availability) and 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*

Australia presents an attractive opportunity for TNZ, with approximately 3.9 million potential ACs

Qualifying criteria for defining ACs

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



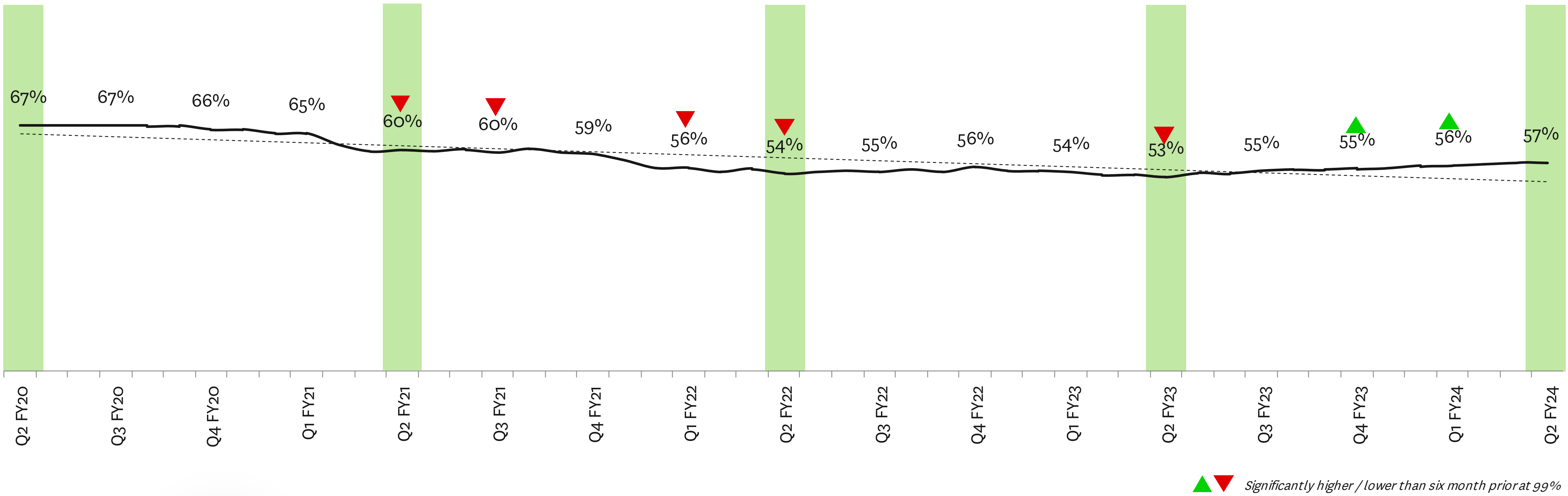
1. The approx. AC pool size is based on the online population estimates as of November 2023 and the AC incidence rate for the current five months
2. Sample size: n = 4411; Q4 FY23 n = 5043

Following a post-pandemic decline, New Zealand's appeal is recovering, however at 57% the current levels still fall short of the pre-pandemic levels of 67%

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

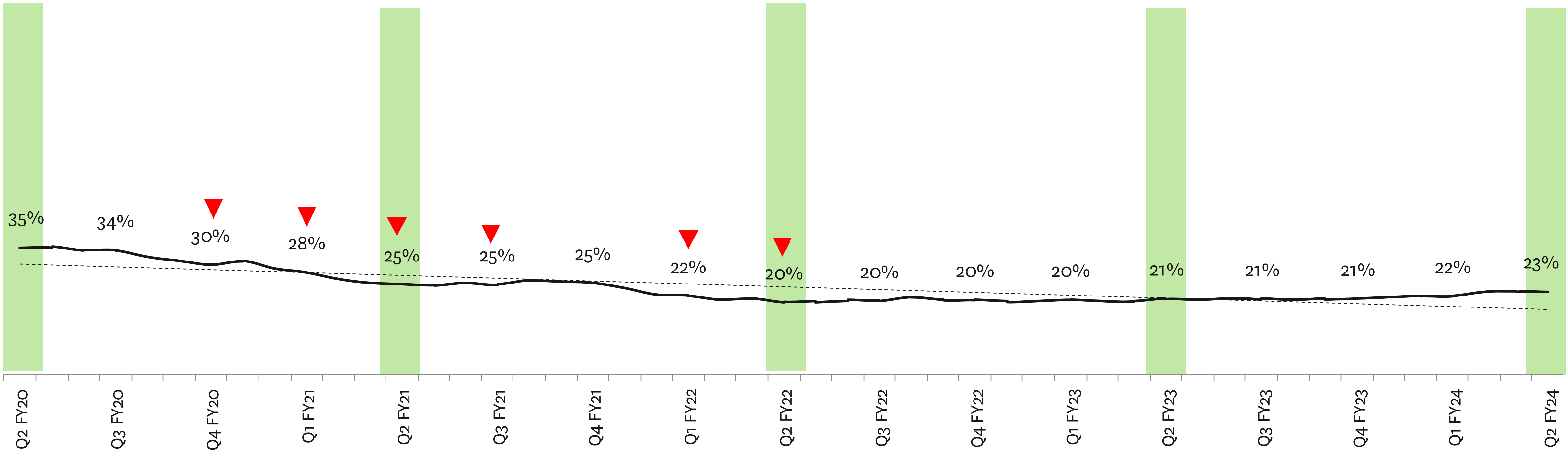


1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 2713, 2860, 3217, 3400, 3951, 4618, 4422, 4425, 4949, 4983, 4892, 4872, 4911, 5043, 5043, 4741, 4441
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

The incidence of ACs is at 23% and considerably lower than the pre-pandemic high of 35% - there is no visible recovery in the incidence of ACs just yet

Incidence of ACs

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



▲▼ *Significantly higher / lower than six month prior at 99%*

1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 2713, 2860, 3217, 3400, 3942, 4606, 4419, 4425, 4949, 4983, 4892, 4872, 4911, 5043, 5043, 4741, 4411
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 AUD while holidaying in New Zealand

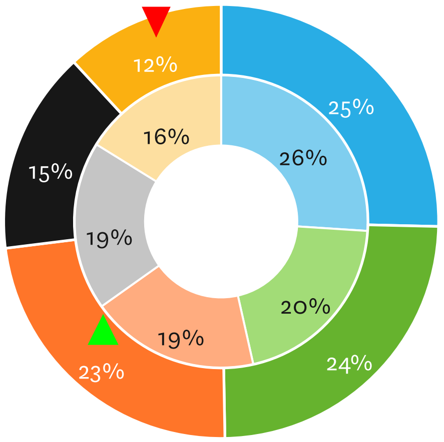
Compared to non-ACs, ACs are more likely to be aged 30-49 years; the priority mindsets make up 32% of our AC pool

Profile of Active Considerer

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

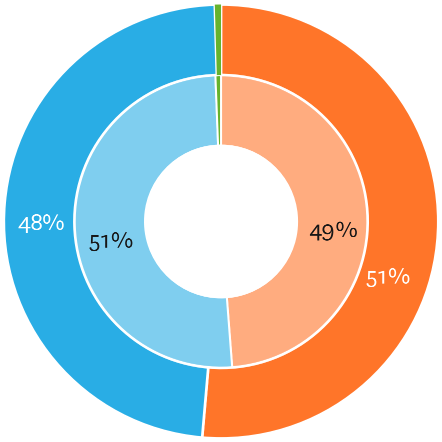
Outer ring: Australian Active Considerers
Inner ring : Australian non-Active Considerers

By age segment



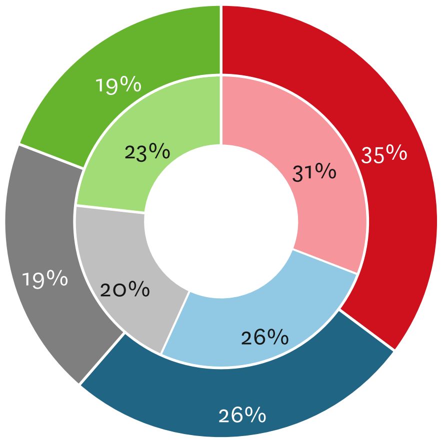
18 - 29 years
30 - 39 years
40 - 49 years
50 - 59 years

By gender



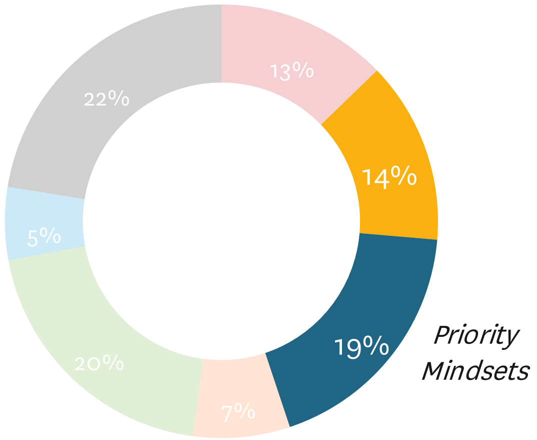
Male
Female

By region



New South Wales
Victoria

Mindset Segments



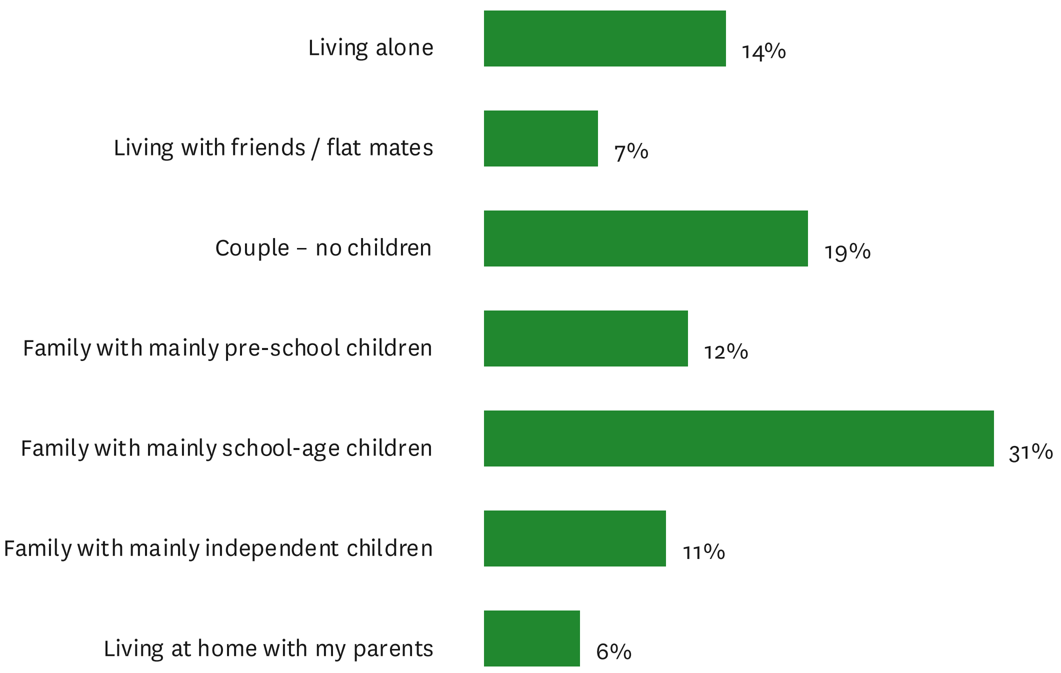
Cautious Escapists
Experienced Connectors
Vibrant Adventurers
Organised Joy Seekers
Spontaneous Explorers
Fun Loving Trail Blazers

Significantly higher / lower than non-ACs

The profile of Australian ACs is broadly split between families and non-families and leans towards those with higher incomes

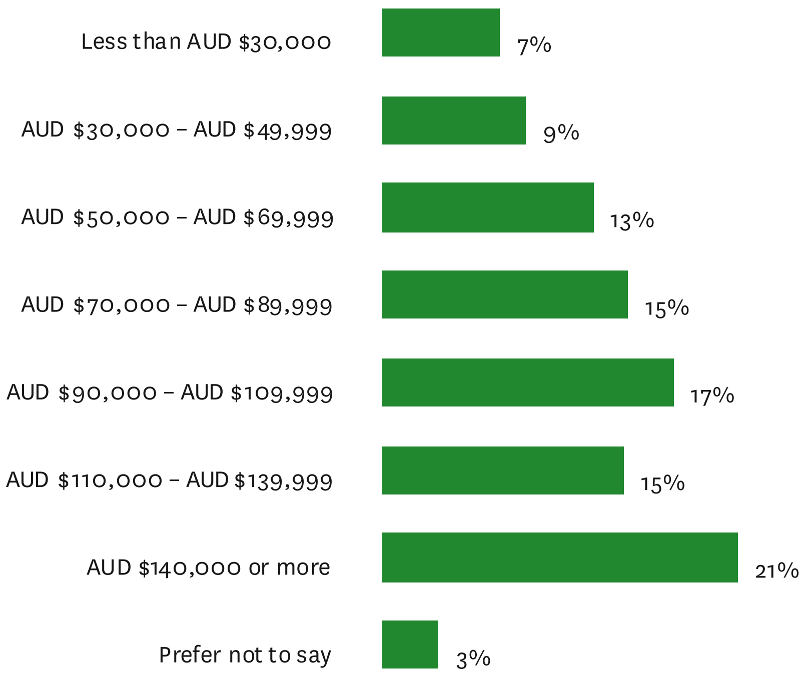
Household Composition

% Active Considerers | Current 5MRA



Household Income

% Active Considerers | Current 5MRA



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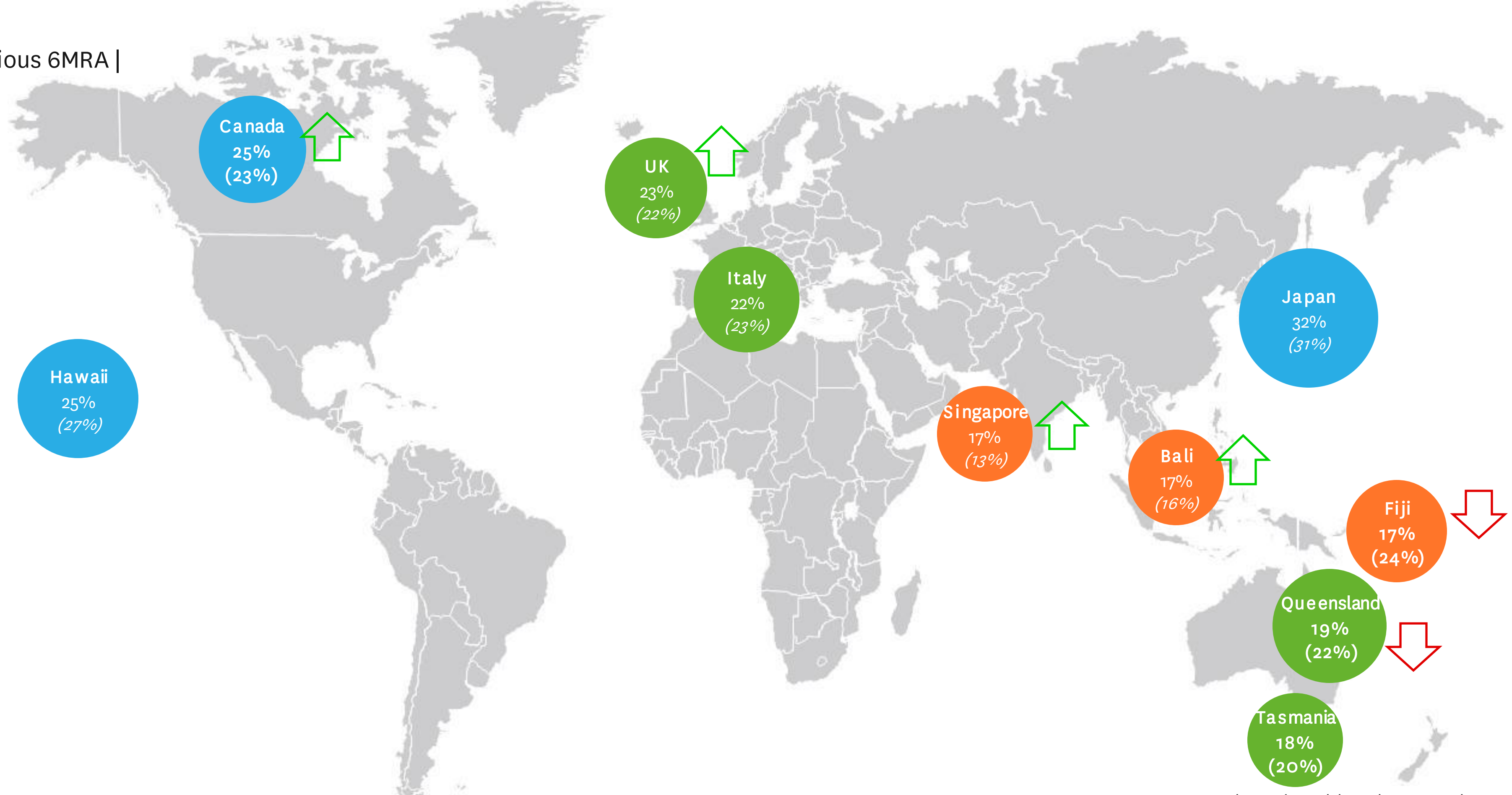
1. Sample size: n = 750
2. Q: "Which of these best describes your household?"
3. Q: "What is your total annual household income?"

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

Japan, Hawaii and Canada are New Zealand's top competitors in terms of preference, followed by UK and Italy, with domestic and Pacific destinations falling in popularity

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

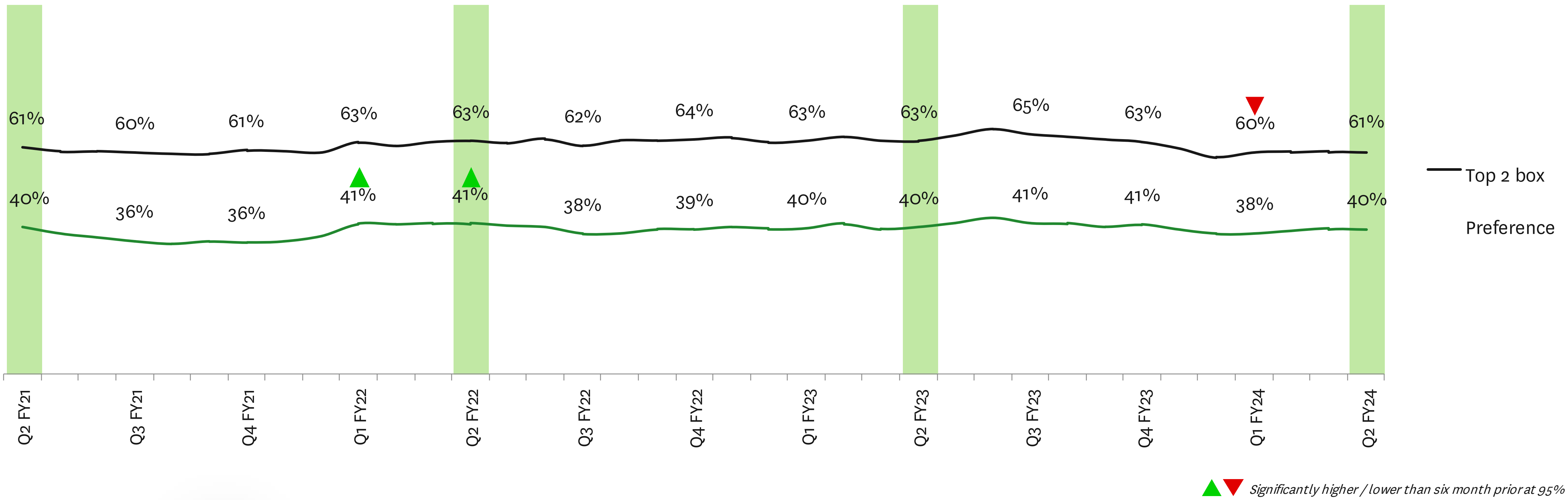
Change in rank by at least two places compared to 6 months ago

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?"

Despite Top 2 Box preference for New Zealand softening in FY24, first-choice preference remains strong and stable over time

NZ as a #1 Preferred Destination

AC Monitor | 6MRA | Total Active Considerers



1. Sample size: Q2 FY21 – Q2 FY24 (6MRA) n =902, 1053, 1052, 900, 900, 900, 900, 900, 900, 900, 900, 900,900
2. 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 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 the core needs for fun and excitement remain true, there are emerging needs for unique experiences and opportunities to explore, escape, relax and refresh, and affordability of flights

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]
Excitement	1	*	2
Landscapes & scenery	2	2	1
Fun & enjoyment	3	5	7
Range of adventure	4	1	4
Invites exploration	5	*	*
Unique experiences	6 ⇧	12 ⇧	23
Safe destination	7 ⇩	3	5
Relax & refresh	8 ⇧	18	17
Friendly people	9 ⇩	4 ⇧	10
Relationship with the land	10 ⇧	15	16
Range of experiences	11	8	6
Escape the ordinary	12 ⇧	19	18
Clean & unpolluted	13 ⇩	9	8
Embrace all visitors	14	11 ⇩	3
Affordable to fly to	15 ⇧	22	19

Latest results	2023 rank	2022 rank[1]	2021 rank[1]
Quality food & wine	16	17 ⇩	13
Iconic attractions	17 ⇧	21 ⇩	9
Family friendly	18 ⇩	6 ⇧	11
Indigenous culture	19	20	*
Easy to travel around	20 ⇩	14	12
All seasons	21 ⇧	26	25
Local culture	22 ⇩	10 ⇧	20
Interesting cities	23	23 ⇧	28
Wildlife	24	24	*
Affordable activities	25 ⇧	31 ⇩	26
Amazing beaches	26	*	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
* Not asked at that time

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

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100% PURE NEW ZEALAND

New Zealand as a destination performs strongly on the high impact drivers, most notably landscapes and scenery, range of adventure, destination safety and inviting exploration

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
4. 'Escape the ordinary' driver re-worded to 'A place you can escape from the ordinary in FY24'

Relative to competitors, New Zealand's core strengths are in its indigenous culture, relationship with the land and cleanliness, but there is an opportunity to boost perceptions of New Zealand as a place that offers fun, diverse and unique experiences

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	Japan	Hawaii	Canada	United Kingdom	Italy
Strategic Brand Drivers	Landscapes & scenery	99	92	90	132	93	94
	Invites exploration	99	96	90	112	110	101
	Unique experiences	91	131	96	98	100	116
	Relationship with the land	112	86	108	85	52	77
	Embrace all visitors	99	90	92	104	132	100
	Indigenous culture	119	91	103	75	31	54
Key Category Differentiators	Fun & enjoyment	93	101	98	108	136	106
	Range of adventure	105	76	107	127	83	76
	Relax & refresh	105	73	134	85	89	89
	Friendly people	100	109	104	101	75	95
	Range of experiences	89	117	94	111	130	120
	Escape the ordinary	95	118	100	92	94	119
	Clean & unpolluted	116	80	76	126	39	60
	All seasons	96	113	112	81	105	106
	Local culture	90	129	104	95	102	117
	Amazing beaches	107	65	152	72	54	109

Actions for TNZ:

Strengths:

- Relationship with the land
- Indigenous culture
- Range of adventure
- Relax and refresh
- Clean & unpolluted
- Amazing beaches

Drivers to dial up:

- Unique experiences
- Fun & enjoyment
- Range of experiences

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

Compared to other destinations, New Zealand is perceived to be more affordable but a less exciting place to visit

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	Japan	Hawaii	Canada	United Kingdom	Italy
Hygiene Factors	Excitement	89	121	93	107	130	117
	Safe destination	99	109	74	110	120	89
	Affordable to fly to	130	79	66	45	48	54
	Family friendly	103	85	102	97	112	91
	Easy to travel around	102	97	81	92	137	88
	Affordable activities	111	95	105	71	74	72
Low Priority	Quality food & wine	97	105	83	84	93	152
	Iconic attractions	86	112	78	106	167	143
	Interesting cities	82	128	72	107	169	153
	Wildlife experience	112	66	96	146	52	54

Actions for TNZ:

Strengths:

- Affordable to fly to
- Affordable activities
- Wildlife experience

Drivers to dial up:

- Excitement

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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

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Tactical communications need to address growing knowledge gaps around how easy New Zealand is to travel around and the length of time it takes to do so as well as how welcoming the locals are

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	How easy it is to travel around	44% ▲	33%
2	What the weather is like	42%	43%
3	How welcoming the locals are	30% ▲	20%
4	How long it takes to travel between the main attractions	30% ▲	24%
5	What / where the recommended things to see and do are	27%	21%
6	The length of time needed to experience New Zealand properly	27% ▲	32%
7	How safe it is from crime	27%	27%
8	The quality and variety of food and beverage options	25% ▲	17%
9	How safe it is to participate in adventure activities	24%	20%
10	Where I should get information about organising a {#hHoliday}	22%	22%

Ranks higher now than six months ago ▲▼ *Significantly higher / lower than six month 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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There is an opportunity to guide ACs through the funnel with tactical messages that address knowledge gaps; for instance, dialling up information about safety and the quality of food and beverage options will help convert bookings

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	How easy it is to travel around	46%	46%	40%
2	What the weather is like	40%	40%	45%
3	How welcoming the locals are	25%	30%	37%
4	How long it takes to travel between the main attractions	28%	32%	32%
5	What / where the recommended things to see and do are	26%	31%	26%
6	The length of time needed to experience New Zealand properly	28%	29%	24%
7	How safe it is from crime	27%	18%	32% ▲
8	The quality and variety of food and beverage options	20%	20%	32% ▲
9	How safe it is to participate in adventure activities	19%	24%	29%
10	Where I should get information about organising a holiday	22%	15%	26%

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

1. Sample size; Dreaming n = 205, Planning n = 91, Booking n = 154
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 is strongest for summer, there are opportunities for seasonal dispersal, particularly spring due to its higher levels of preference over other off-peak seasons

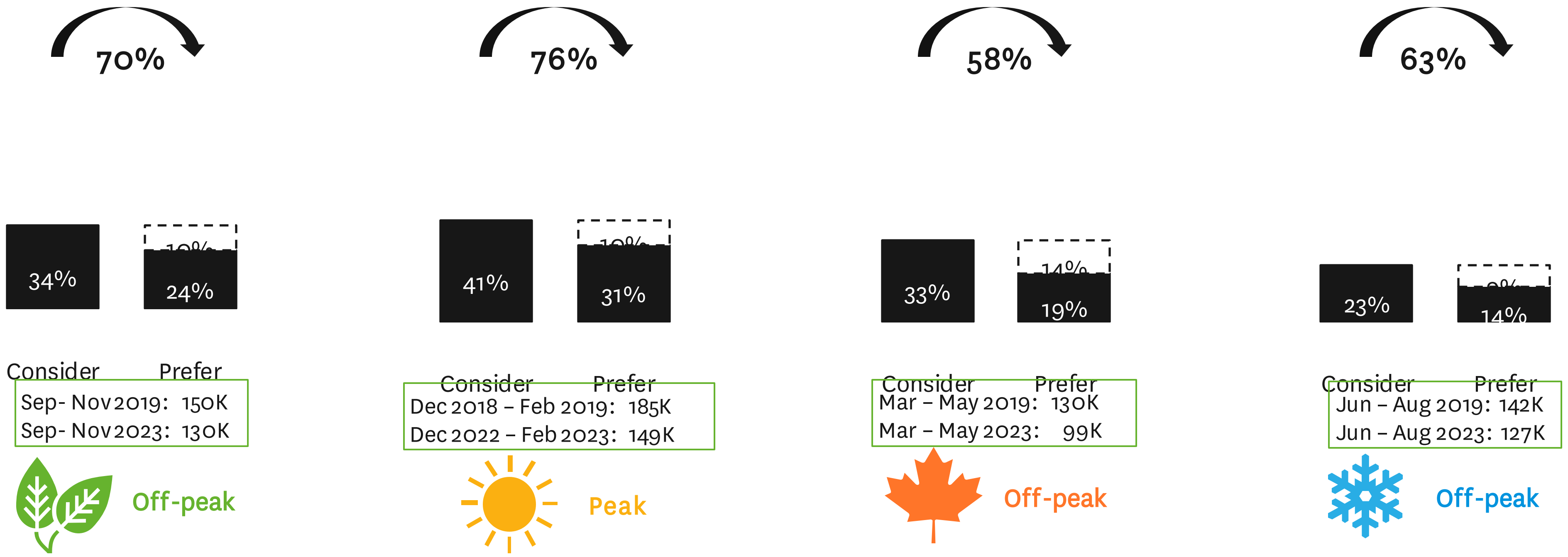
Seasons – consideration & preference

AC Monitor | Current 5MRA | Total Active Considerers

Conversion of consideration to preference

Opportunity

Holiday Arrivals data

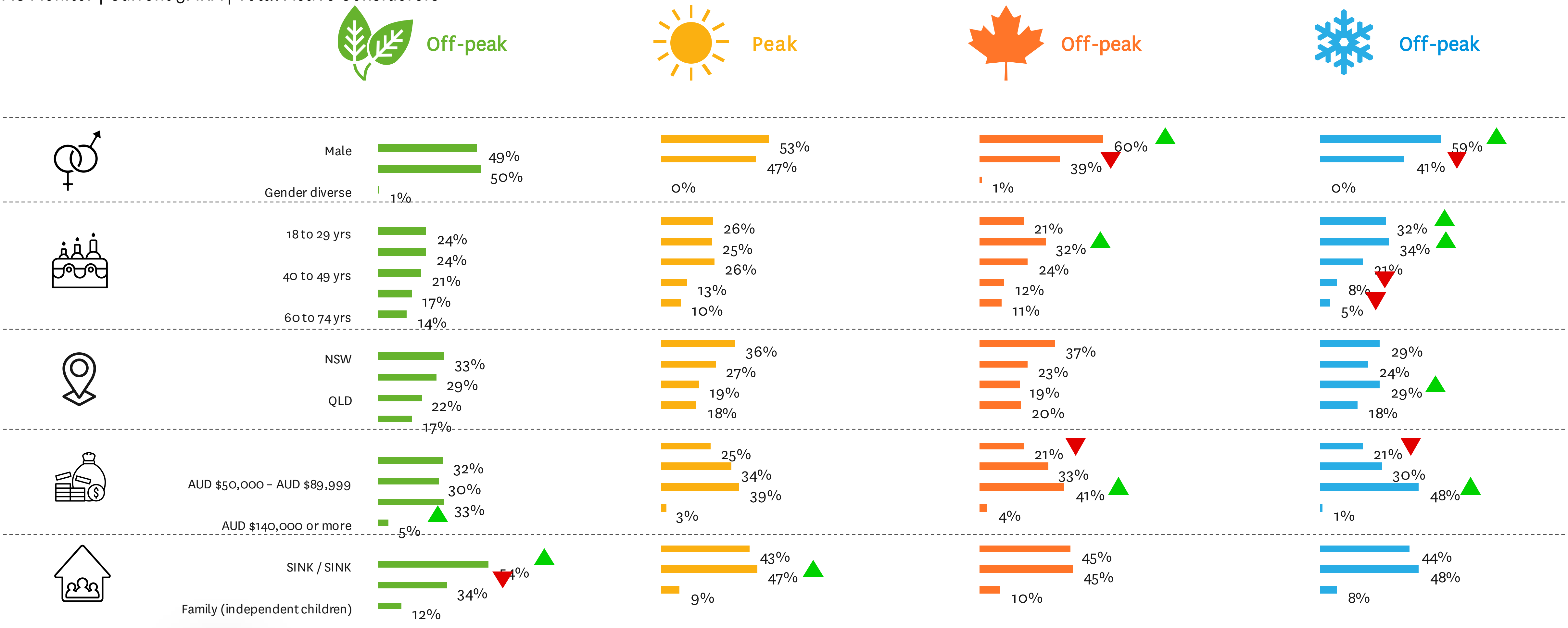


1. Sample size: n = 750
2. Question: “At what time(s) of year would you consider visiting New Zealand?” When would you prefer to visit New Zealand?”
3. Spring ‘Off-peak’ refers to the period Sep, Oct, Nov; ‘Peak’ refers to the period Dec, Jan, Feb; Autumn ‘Off-peak’ refers to the period Mar, Apr, May; ‘Off peak’ refers to the period Jun, Jul, Aug
4. Stats NZ International Visitor Arrivals Dec 2018 – Nov 2019 and Dec 2022 – Feb 2023

The demographic profiles of autumn and winter considerers skew towards males, younger ACs and those with higher household incomes

Profile of Seasonal Considerers

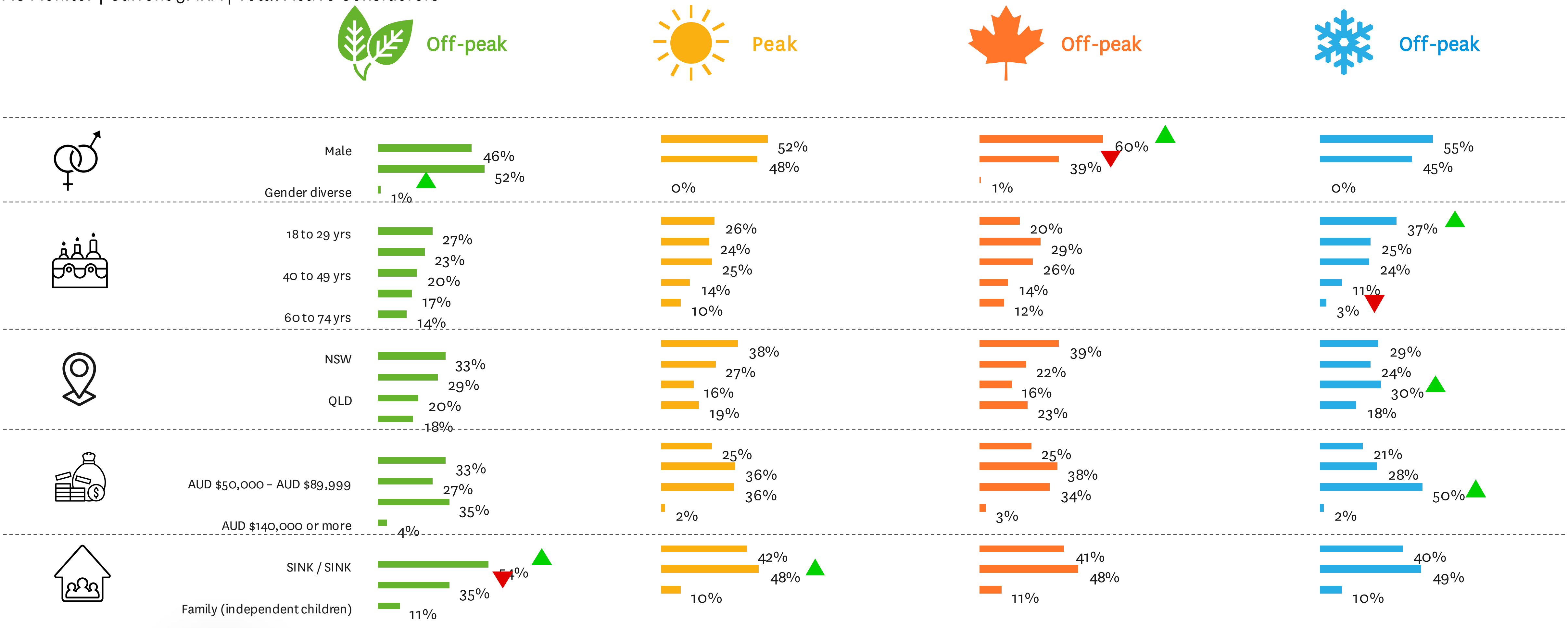
AC Monitor | Current 5MRA | Total Active Considerers



The profile of autumn preferers is similar to that of spring and summer, whereas winter preferers skew younger, higher household income and are more likely to be from Queensland

Profile of Seasonal Preferers

AC Monitor | Current 5MRA | Total Active Considerers



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

Significantly higher / lower than non-preferers of that season

Appendix

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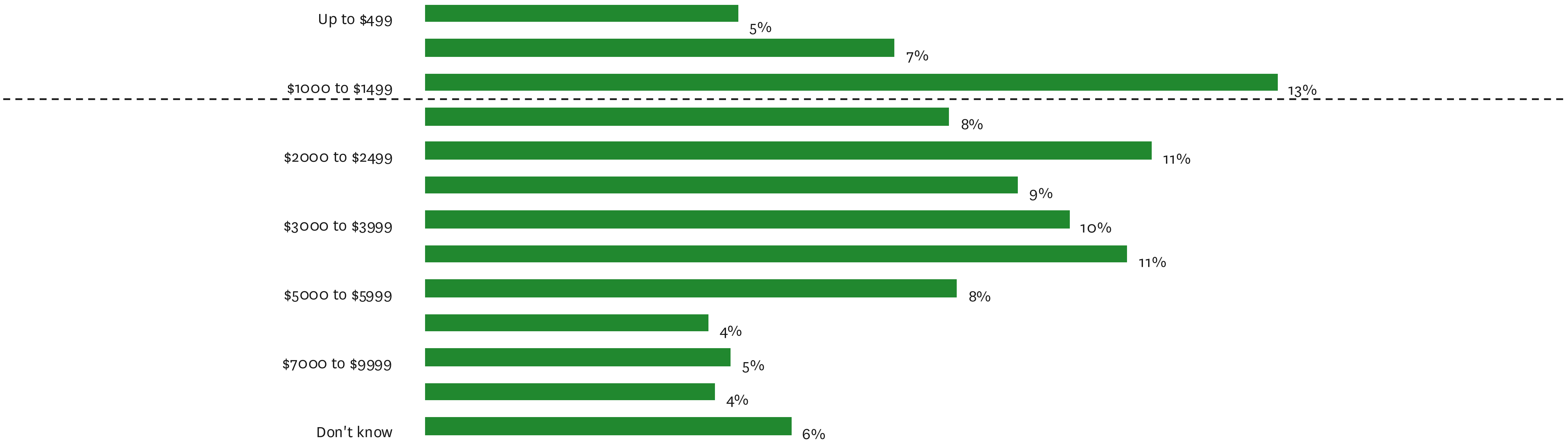
100% PURE NEW ZEALAND
newzealand.com

Among those who agree New Zealand is a preferred destination, 25% do not meet the current spend criteria of $1,500AU

Spend on holiday in New Zealand

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



Sample sizes: n = 1105

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"

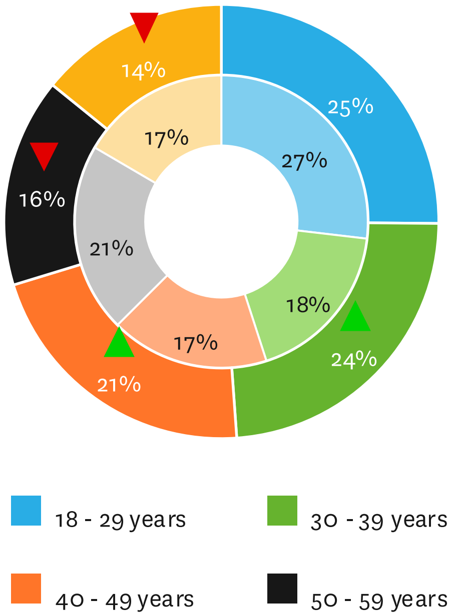
Compared to those who do not find New Zealand appealing, those who do are more likely to be aged 30 – 49 years and reside in New South Wales

Profile of those who find New Zealand appealing

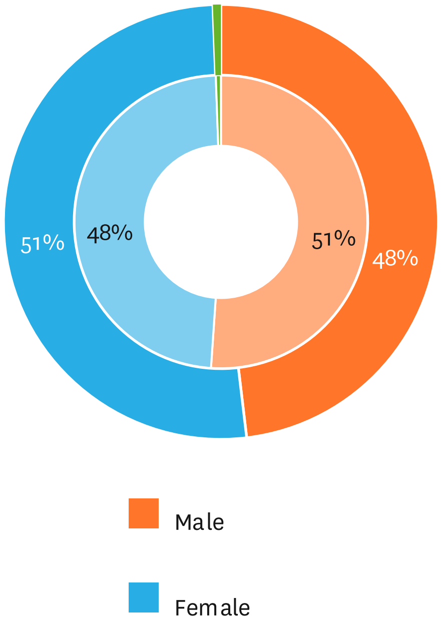
AC Monitor | Current 5MRA | Those who would find New Zealand appealing vs. not

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

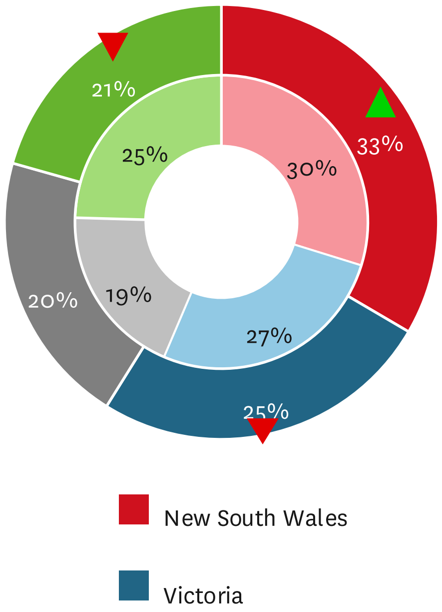
By age segment



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 = 2020 | Those who do not find New Zealand appealing n = 1591

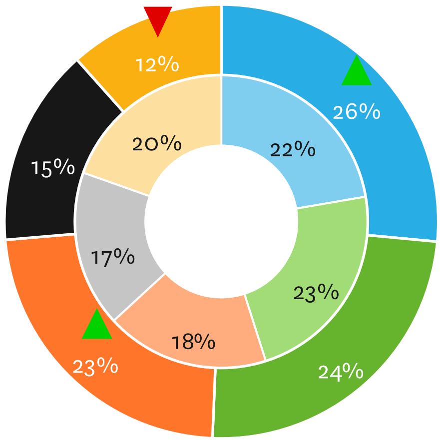
Compared to non-considerers, the profile of serious considerers is skewed more towards those aged 18-29 and 40-49 years, as well as those who live in New South Wales

Profile of those who would seriously consider visiting New Zealand

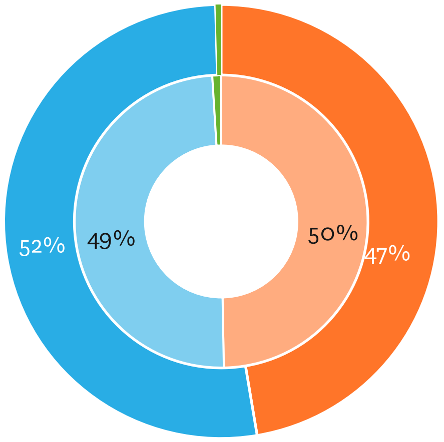
AC Monitor | Current 5MRA | Those who would seriously consider vs. not

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

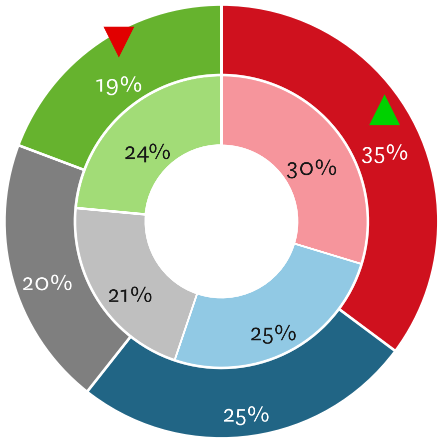
By age segment



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 = 1322 | Those who would not seriously consider visiting New Zealand n = 698

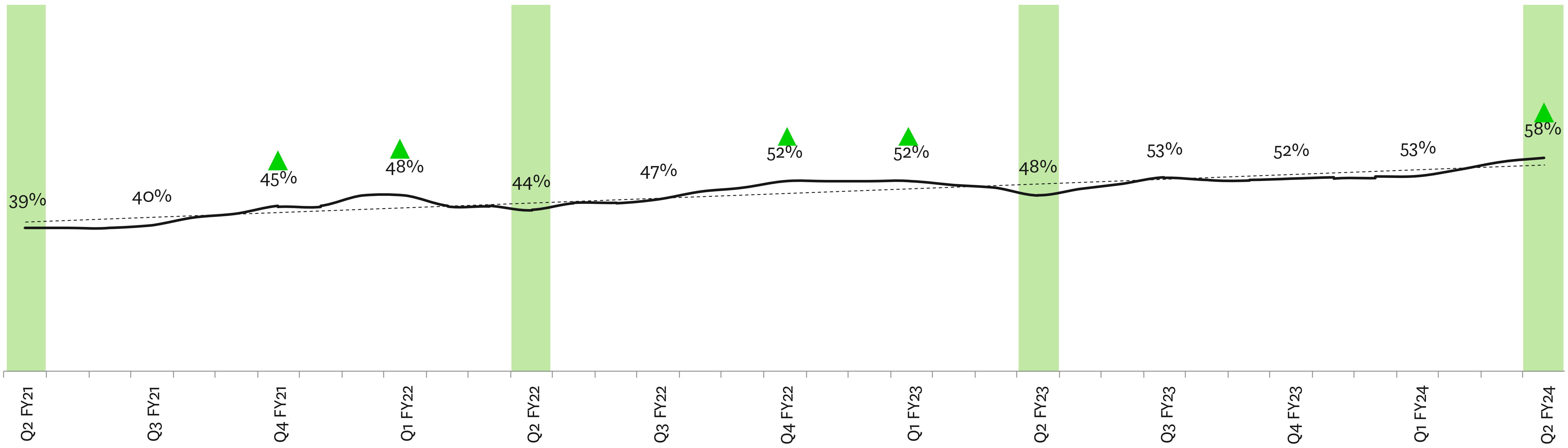
KANTAR

100% PURE NEW ZEALAND

Awareness of Destination New Zealand advertising has increased in the latest quarter, supporting a long-term upward trend since Covid

Seen New Zealand advertised or promoted recently (Prompted Awareness)

AC Monitor | 6MRA | Total Active Considerers



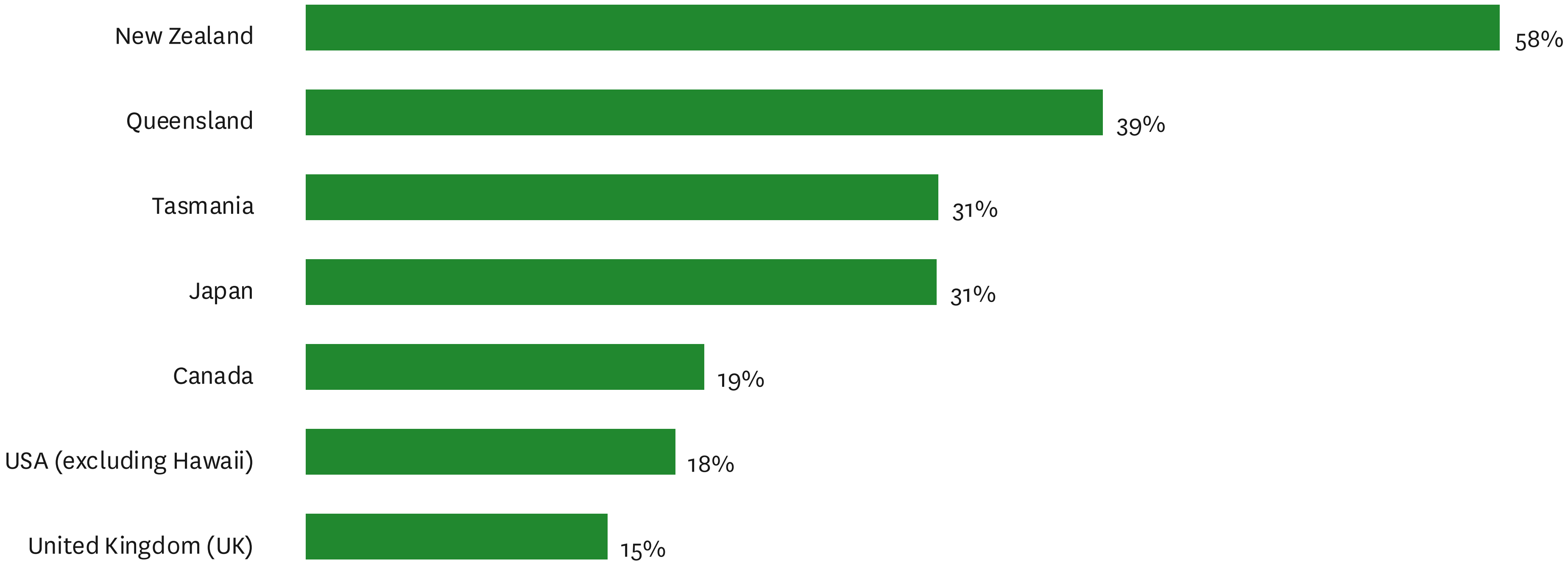
Significantly higher / lower than six month prior at 99%

1. Sample size: Q2 FY21– Q1 FY24 (6MRA), Q2 FY24 (5M) n = 751, 1053, 1052, 900, 900, 900, 900, 900, 900, 900, 750
2. Question "Which of these holiday destinations have you seen advertised or promoted recently?"

New Zealand is the most prominent holiday destination that ACs can recall from recent advertising, followed by other Australian states

Holiday destinations seen advertised or promoted recently (Prompted Awareness)

AC Monitor | Current 5MRA | Total Active Considerers



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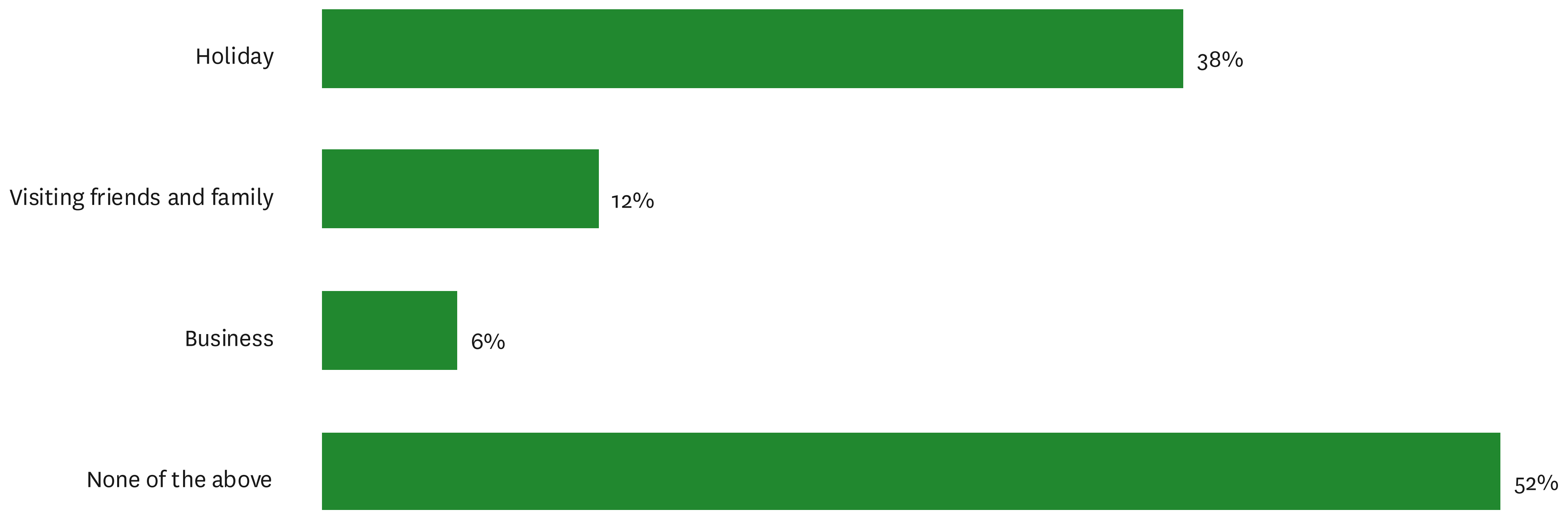
1. Sample sizes: n = 750
2. Question "Which of these holiday destinations have you seen advertised or promoted recently?"

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

Approaching half of Australian non-ACs have previously visited New Zealand, most commonly for a holiday

Reasons for previous visits to New Zealand (if any)
Non-ACs | AC Monitor | Current 5MRA

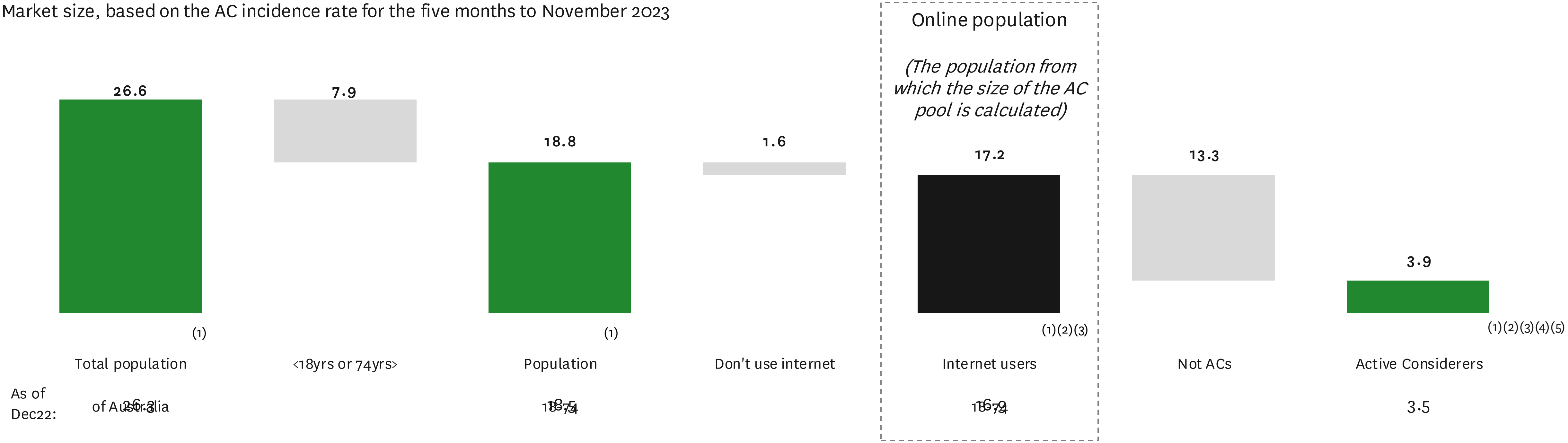


1. Sample sizes: n = 2844
2. Question "Have you visited New Zealand for any of the following reasons before?"

Australia Market Sizing

Nov 23 | Million people

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



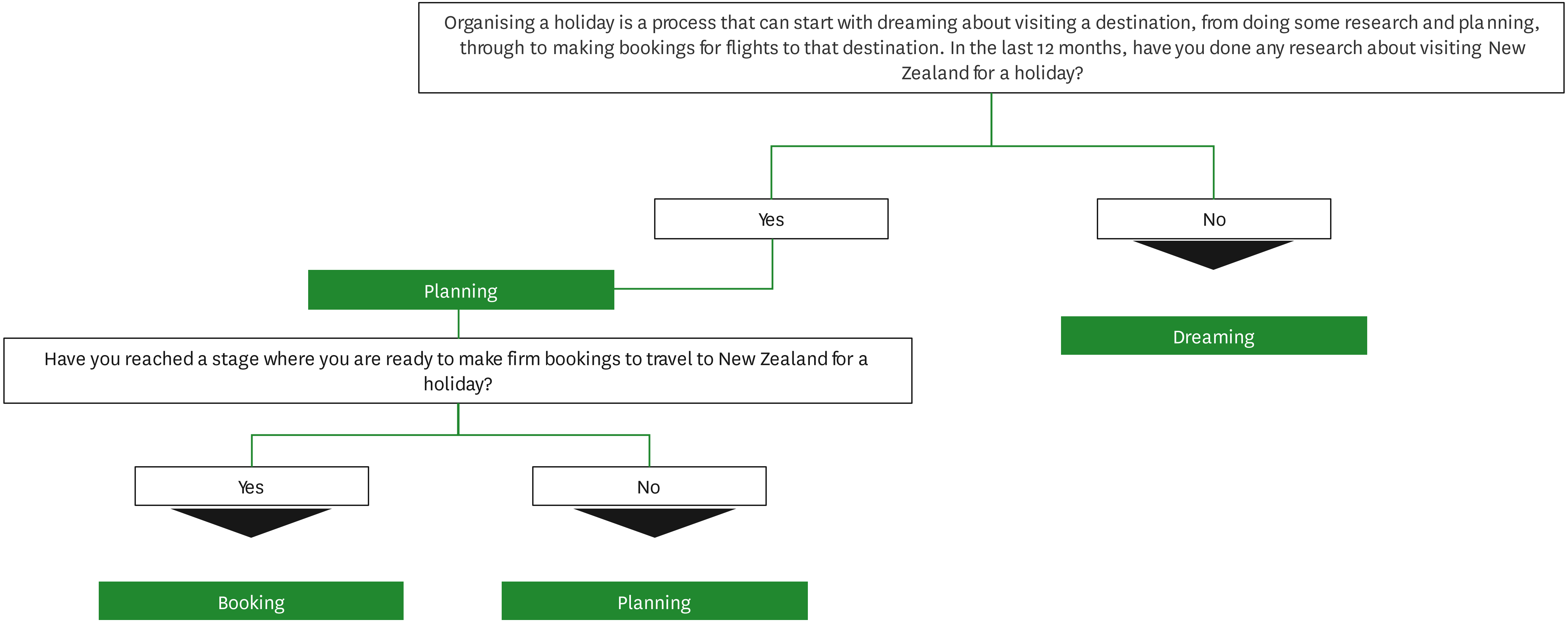
SOURCES/NOTES:
(1) Australian Bureau of Statistics, Australian Demographic Statistics, Table 8 Estimated resident population, by age and sex; Time period: 30 June 2023; Coverage: All Australian residents
(2) Australian Bureau of Statistics, Population clock; Time period as at mid January 2024
(3) Kantar 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

KANTAR

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

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