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Singapore Active Considerer market

Full report

Tourism New Zealand

April 2022



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Objective

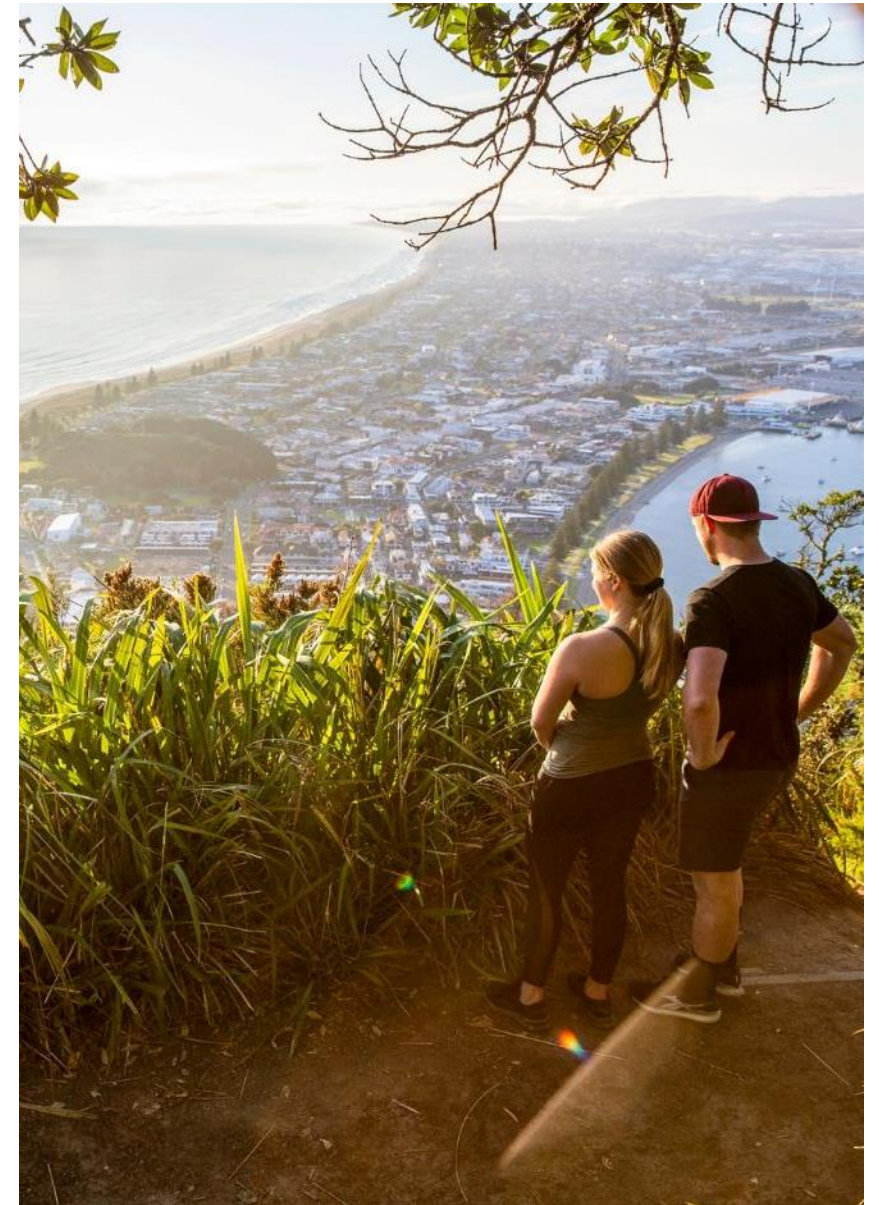
Provide an update on the size and profile of the Active Considerer (AC) audience in Singapore and their sentiment towards travelling to New Zealand, now that New Zealand borders have re-opened

BACKGROUND

- The Covid-19 pandemic has had a significant impact on the New Zealand tourism industry, now facing the most prominent economic struggle since the Global Financial Crisis
- With many international border restrictions lifting, New Zealand is reopening its borders in stages for international travellers. From May 2022, vaccinated travellers from around 60 visa-wavier countries, including Singapore, can enter New Zealand
- While the Singapore market has not been a strategic focus for New Zealand historically, with COVID-19 reshaping the travel landscape, Tourism New Zealand (TNZ) is keen to evaluate the opportunity within the Singapore market
- Specifically, TNZ needs an update on the size and profile of the AC audience in Singapore from the last dip on Sep 21 as well as an understanding of the demand to travel to New Zealand now that borders have opened

RESEARCH APPROACH

- To answer the objective, a 15-minute online survey was conducted among 499 Singaporean Active Considerers of New Zealand
- Fieldwork took place between 3rd – 15th May 2022



Key insights

1

The Singaporean market continues to be a compelling opportunity for TNZ with 26% of the total population actively considering New Zealand as a holiday destination, which is higher than many other key markets, though smaller in absolute terms (0.7M people)

2

New Zealand faces strong competition from Asian destinations – Japan remains New Zealand’s top competitor and Taiwan is growing in preference

To build a competitive edge, New Zealand should leverage its perceptions of having amazing wildlife experiences and beautiful landscapes and build perceptions of it being a place to relax, refresh and have fun

New Zealand also needs to build perceptions of affordability which is becoming more important – the perceived value proposition to travel to New Zealand is strong but all-inclusive packages may help build perceptions of value

3

Singapore has the ability to play a key role in New Zealand’s holiday demand recovery. Now that New Zealand borders are open, 45% ACs see themselves travelling to New Zealand within the next 6 months

To ensure high conversion to booking, communications need to promote flexible refund policies and ease of access to healthcare. Singaporean ACs would be open to pay extra for these additional measures

1

The size and profile of the AC market



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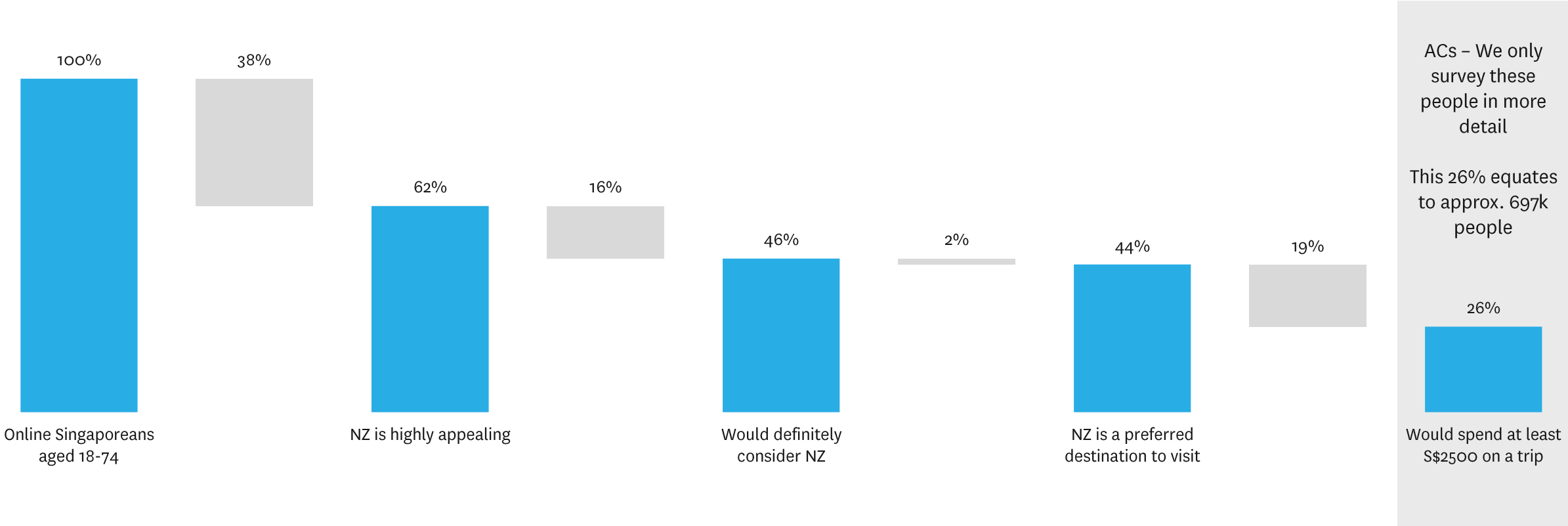


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The incidence of ACs among the online population in Singaporean is 26%, equating to approximately 697k people

Qualifying criteria for defining ACs

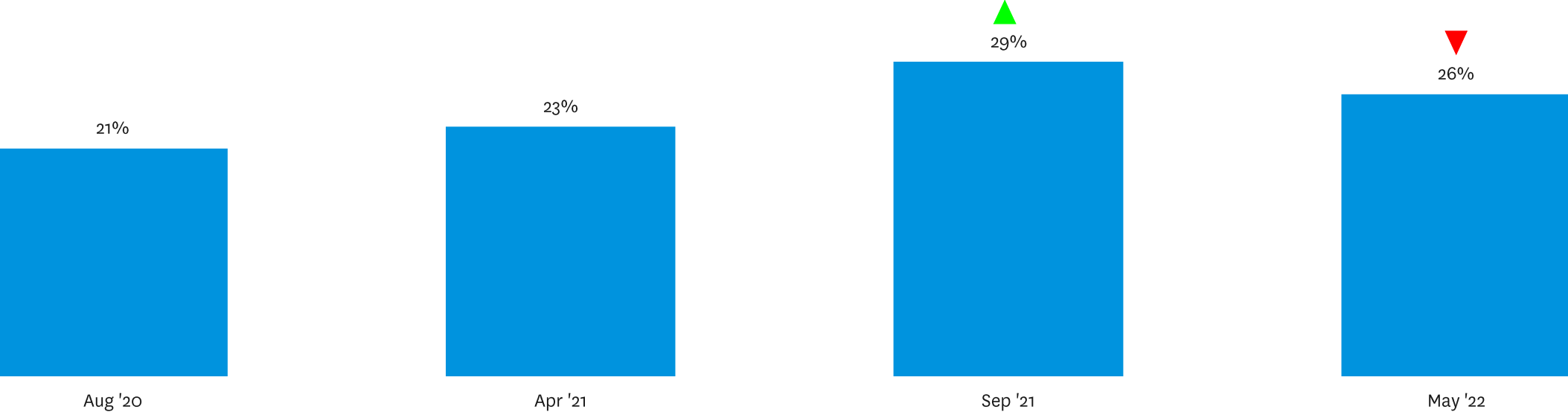
% Online users aged 18-74 | May 22



The incidence of ACs has dropped since Sep '21 although is at comparable levels to those seen at the same time last year

Incidence of ACs

% Online users aged 18-74 | Over time



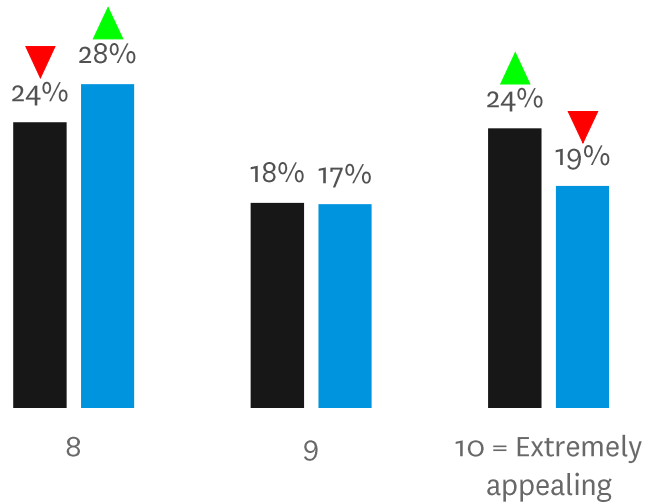
▲ ▼ Significantly higher / lower over time



The reduced AC incidence is a combination of a drop in appeal, consideration and preference for New Zealand among the Singaporean adult population

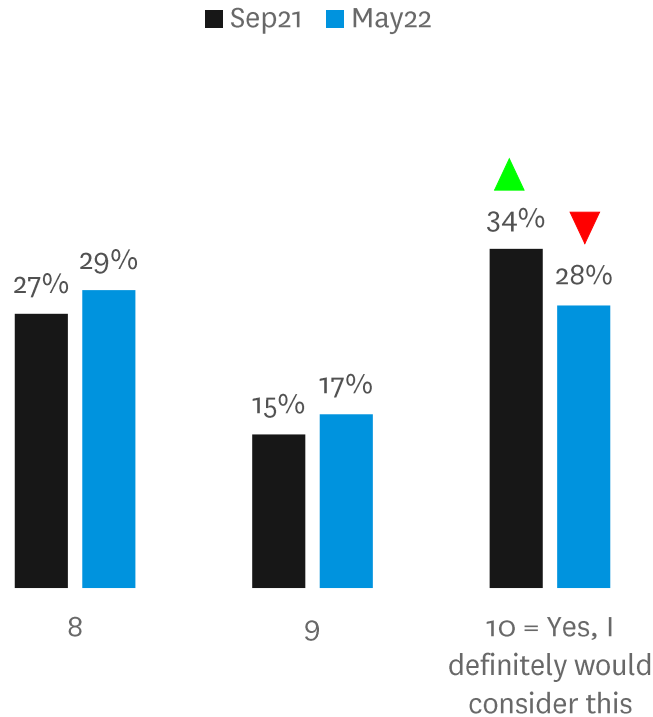
Appeal of New Zealand

% Online users aged 18-74 | May 22



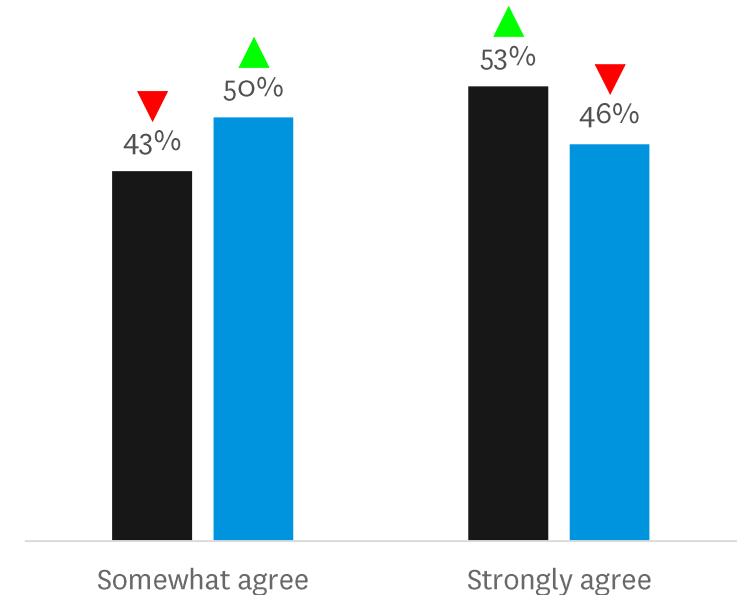
Consideration of New Zealand

% Online users aged 18-74 | May 22



Preference of New Zealand

% Online users aged 18-74 | May 22



Notes:

1. Sample sizes: Sep21, May22 n = 1780, 2,053

Q "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

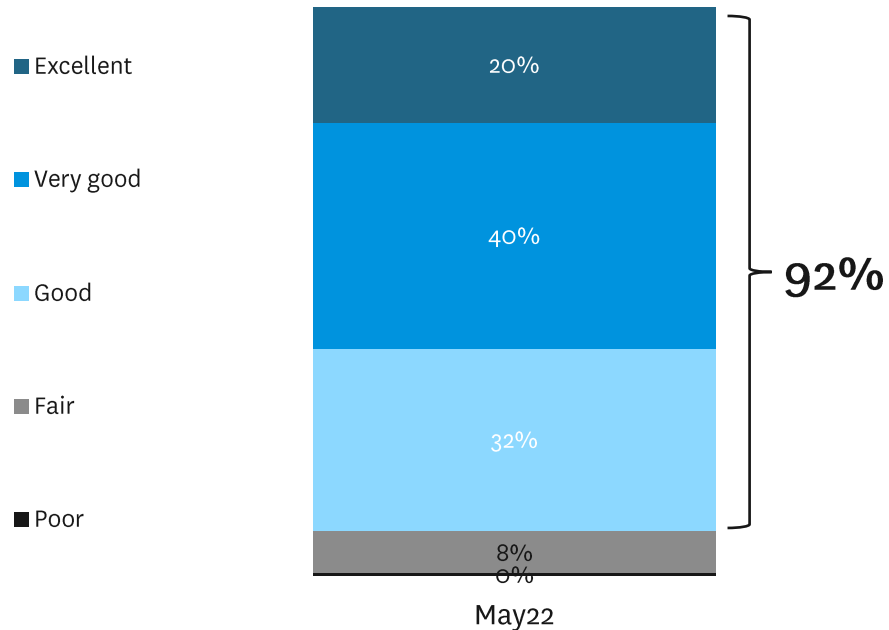
Q" Would you consider visiting New Zealand for a holiday within the next three years?"

Q" To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"

The perceived value proposition of holidays in New Zealand is good – however, all-inclusive packages are potential solutions to improve the value proposition equation further

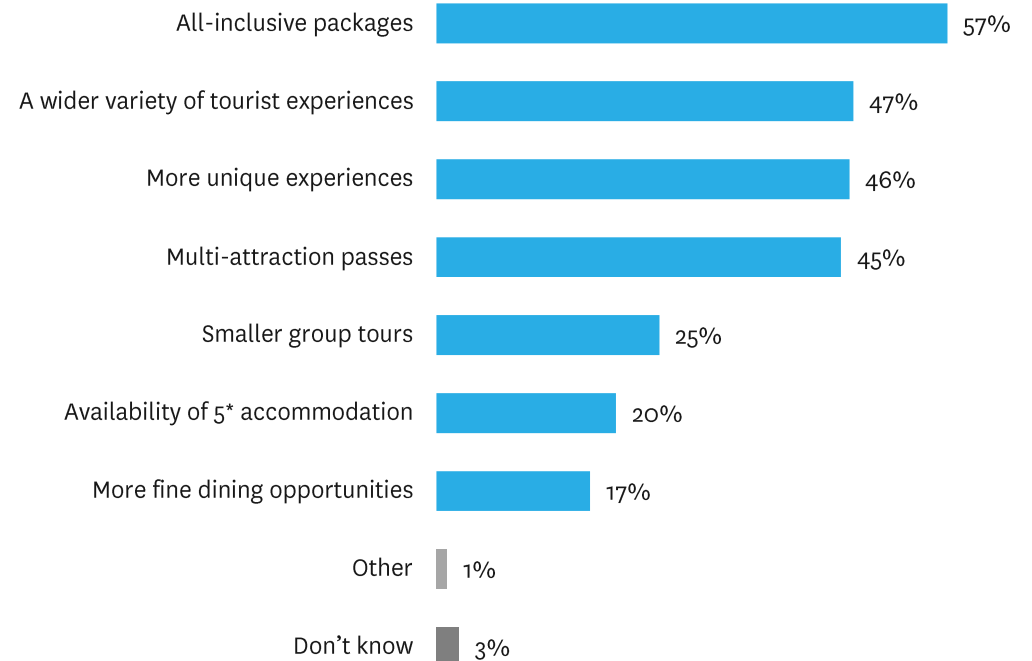
Holiday in New Zealand value for money

% Non-ACs | May 22

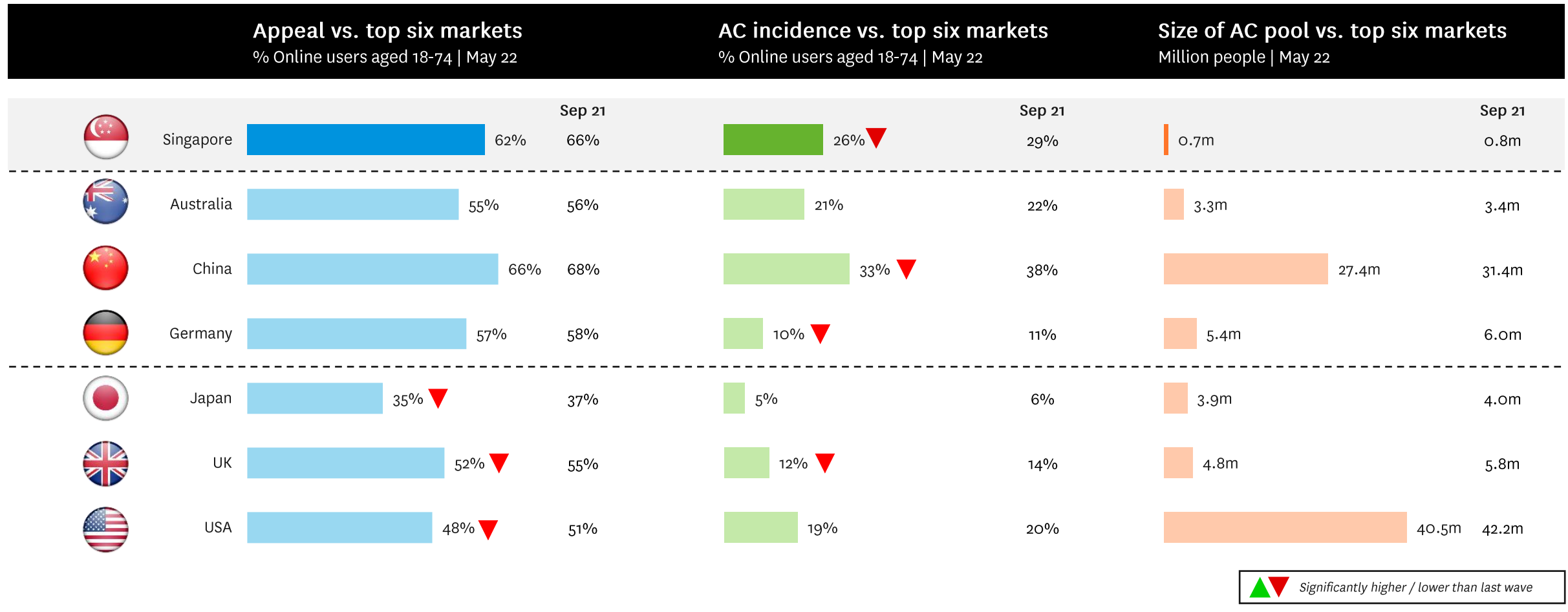


Improvements to value perceptions of holiday in New Zealand

% Non-ACs | May 22



The reduced size of the AC pool between Sep 21 and May 22 reflects a pattern seen across other markets, resulting in an incidence that remains stronger than many key markets



Notes:

1. Sample sizes: Sep21, May22 n = 1780, 2,053
2. Source for top 6 markets: AC Monitor | Online users aged 18-74 | Apr21 - Sep21 | Nov21-Apr22, Australia n = 4,425, 4,692 | China n = 2,531, 2,951 | Germany n = 9,343, 10,635 | Japan n = 20,636, 20,148 | UK n = 8,045, 10,163 | USA n = 6,122, 6,263

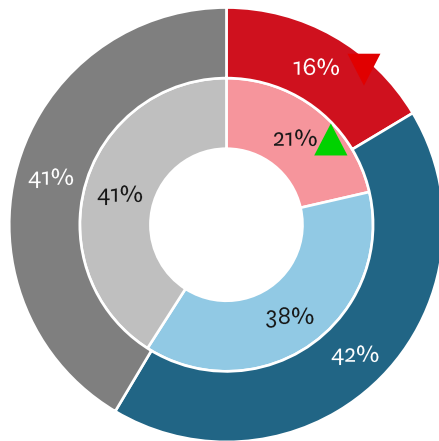


The 25-54 and 55+ age groups are fairly evenly split among our ACs, and the Passive Passengers are the largest mindset segment

Profile of Active Considerers

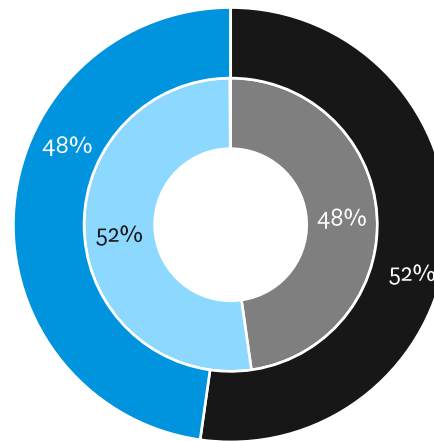
% Active Considerers vs % Non Active Considerers | May 22

By age segment



18-24 25-54 55+

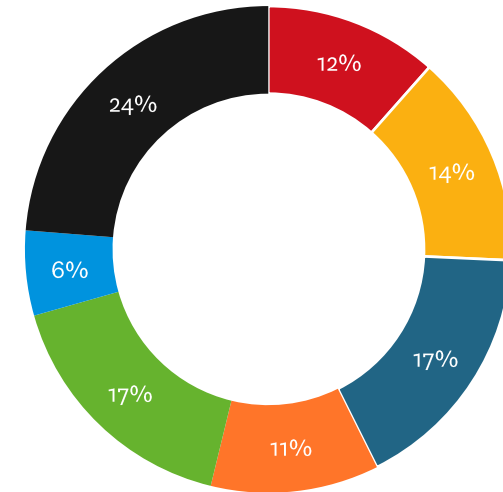
By gender



Male Female Gender diverse

Outer ring: Singaporean ACs
Inner ring: Singaporean non-ACs

Mindset Segments



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

▲ ▼ Significantly higher / lower than non-ACs at 95%



2

Desirability of New Zealand as a holiday destination

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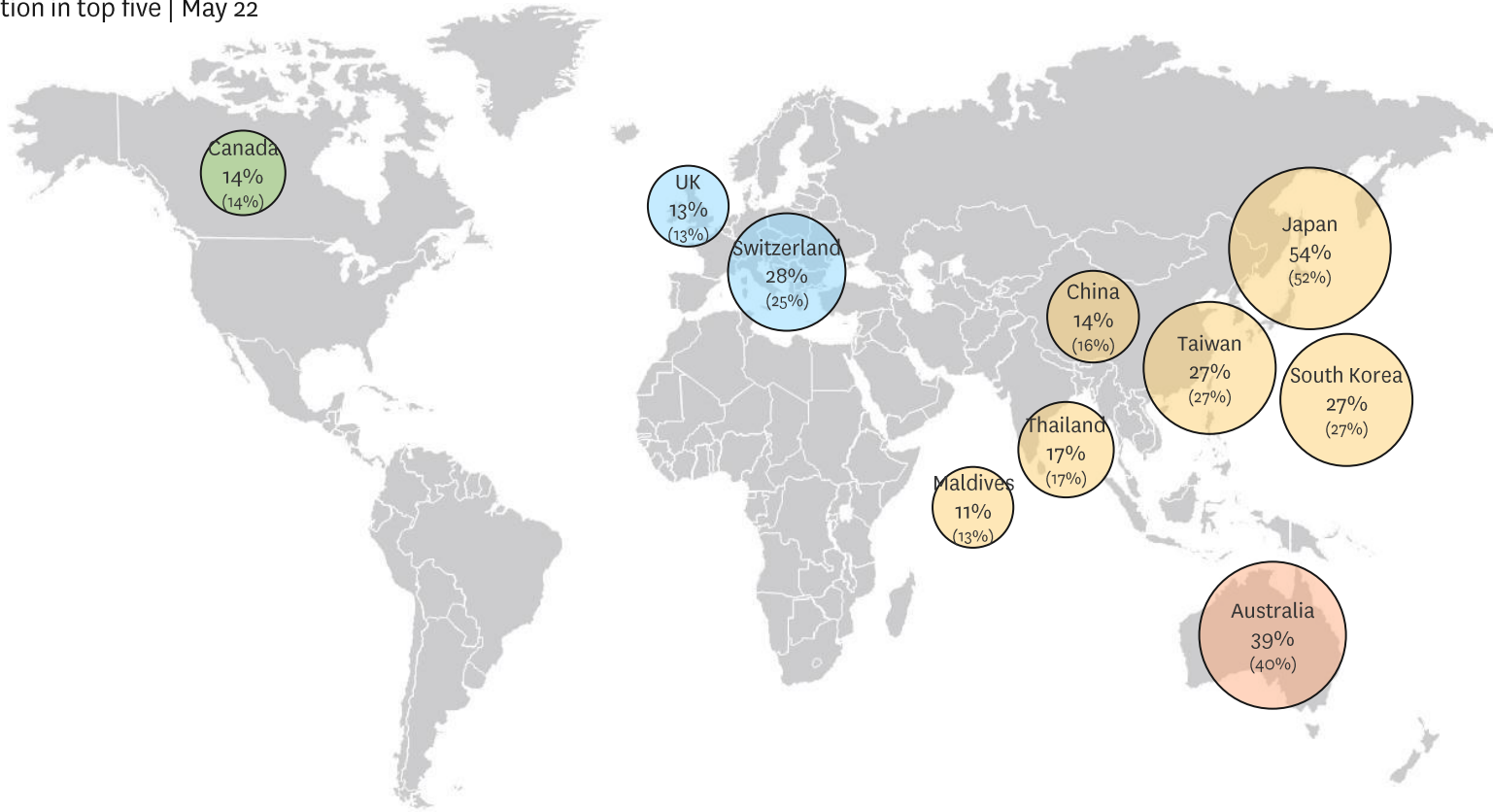


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Japan remains New Zealand's top competitor, followed by Australia

Top ten competitor set for ACs

% Active Considerers ranking destination in top five | May 22



▲ ▼ Significantly higher / lower than last wave at 95%

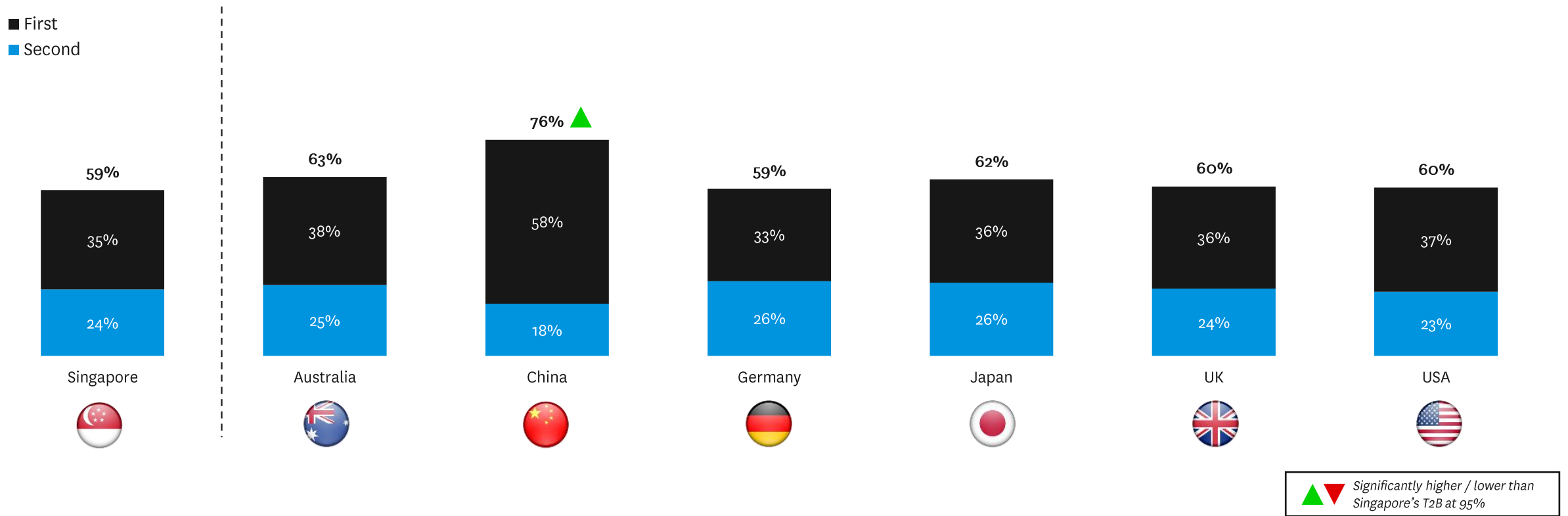


Notes:
 1. Sep 21 results are in brackets
 2. Sample sizes: Sep 21, May22 n = 500, 499
 3. Q "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"

Preference for New Zealand among Singapore ACs is comparable to most other key markets, except China where preference is much higher

Preference KPI vs. top six markets

% Active Considerers in market | May 22



Notes:

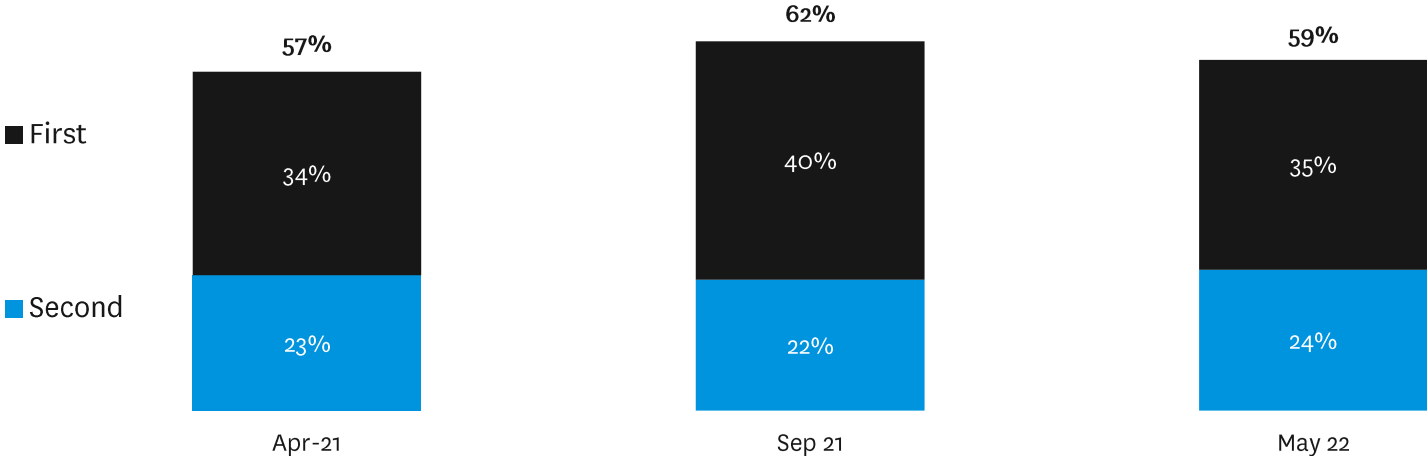
1. Sample size: Singapore ACs May22 n = 499
2. Source for top 6 markets: AC Monitor | 6MRA | Total Active Considerers | Nov21-Apr22
 Australia n = 900 | China n = 901 | Germany n = 901 | Japan n = 900 | UK n = 900 | USA n = 899
 Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"



Among ACs, preference for New Zealand remains stable

Preference KPI Singapore over time

% Active Considerers | May 22



▲ ▼ Significantly higher / lower than last wave at 95%



Notes:
1. Sample sizes: Total ACs Sep 21, May22 n = 500, 499
Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"



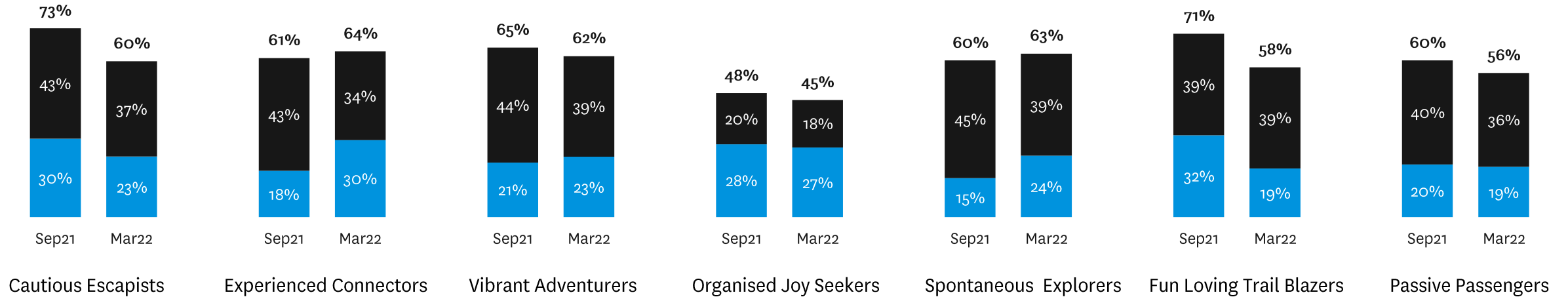
Similarly, preference by Mindset groups stays broadly stable

Preference KPI Singapore over time by Mindset segments

% Active Considerers | May 22

■ First

■ Second



▲ ▼ Significantly higher / lower than last wave at 95%



Notes

1. Sample size n approx. 60
 Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

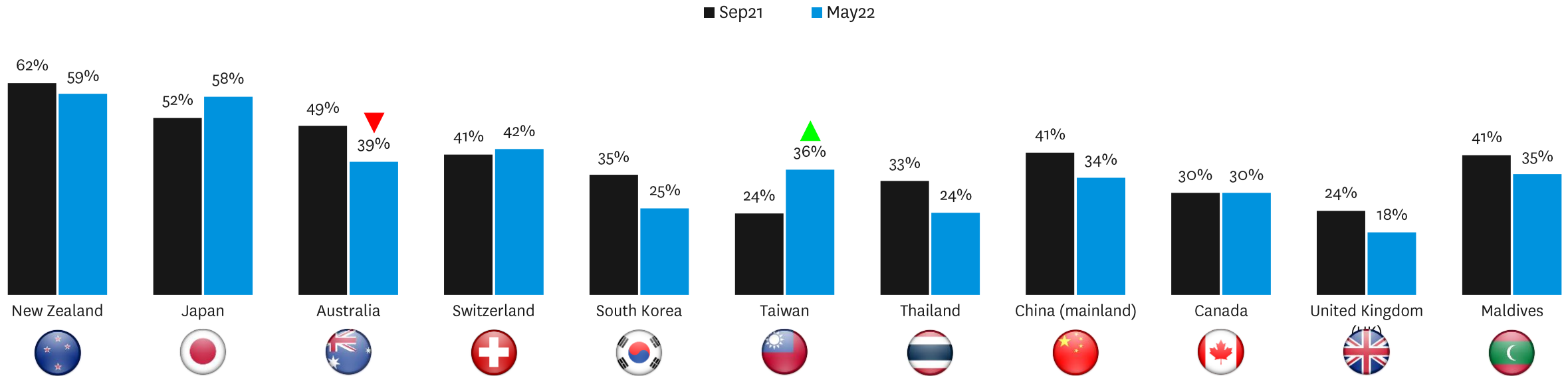
▲ ▼ Significantly higher / lower than Singapore's T2B at 95%



Among Singaporean ACs, preference for Australia has decreased compared to Sep 21 while preference for Taiwan has increased

Preference of destination of interest (T2B)

% Active Considerers | May 22



▲ ▼ Significantly higher / lower than last wave at 95%



Notes:

1. Top 10 destinations reported only
2. Sample sizes: Total ACs Sep 21, May 22 n = 500, 499
3. Scores ordered by 'first preference'
4. Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

This heat map shows the relative performance of the attributes we measure that drive preference for New Zealand. Our role is to influence how our target audience perceive New Zealand relative to its competitive set; we cannot influence our competitors, we can only influence how New Zealand is seen through our communications

Relative brand positioning

Index (see appendix) | Total Active Considerers | Brand associations | New Zealand and top five competitors | May 22

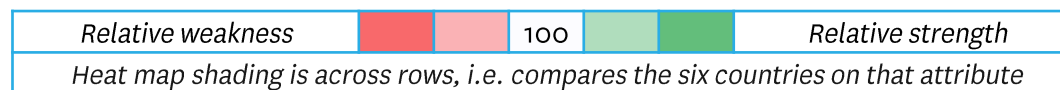
Brand associations	New Zealand	Japan	Australia	Taiwan	South Korea	Switzerland
Landscapes & scenery	107	88	106	119	79	79
Safe destination	94	114	93	103	108	100
Embraces visitors	97	99	92	109	104	115
Range of adventure	116	66	126	97	71	80
Clean & unpolluted	105	103	102	119	76	67
Fun & enjoyment	93	100	97	112	114	114
Friendly people	96	118	83	85	99	125
Range of experiences	94	112	92	102	123	94
Unique experiences	104	104	90	113	88	85
Comfortable	93	114	93	97	120	101
Escape the troubles of the world	105	87	95	118	104	89
Relax & refresh	105	88	103	124	80	89
Amazing wildlife experiences	132	50	157	71	36	49
Local culture	92	126	84	76	120	117
Quality food & wine	91	113	106	84	115	108
Affordable activities	90	78	100	61	152	188
Local experiences	101	101	91	72	109	126
Iconic attractions	90	116	106	106	99	97

Actions for TNZ:
More focus is needed on communicating:

- Iconic attractions
- Quality food and wine
- Local culture
- Comfort
- Fun & enjoyment

While leveraging our core strengths:

- Amazing wildlife experiences
- Range of adventure
- Landscapes & scenery
- Relax and refresh



3

Demand to travel
post-Covid



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Appetite for travelling overseas is high, with 94% of ACs looking to travel as frequently or more often than they did pre-Covid

Expected change to overseas holiday travel

% Active Considerers | May 22

■ Take overseas holidays more often ■ Take overseas holidays as often as I used to ■ Take overseas holidays less often



94%

are at least or more interested in travelling as often as pre-covid

Sep21

30%

55%

15%

▲ ▼ Significantly higher / lower than last wave at 95%



Notes:

1. Sample size: Sep21, May 22 n = 500, 499

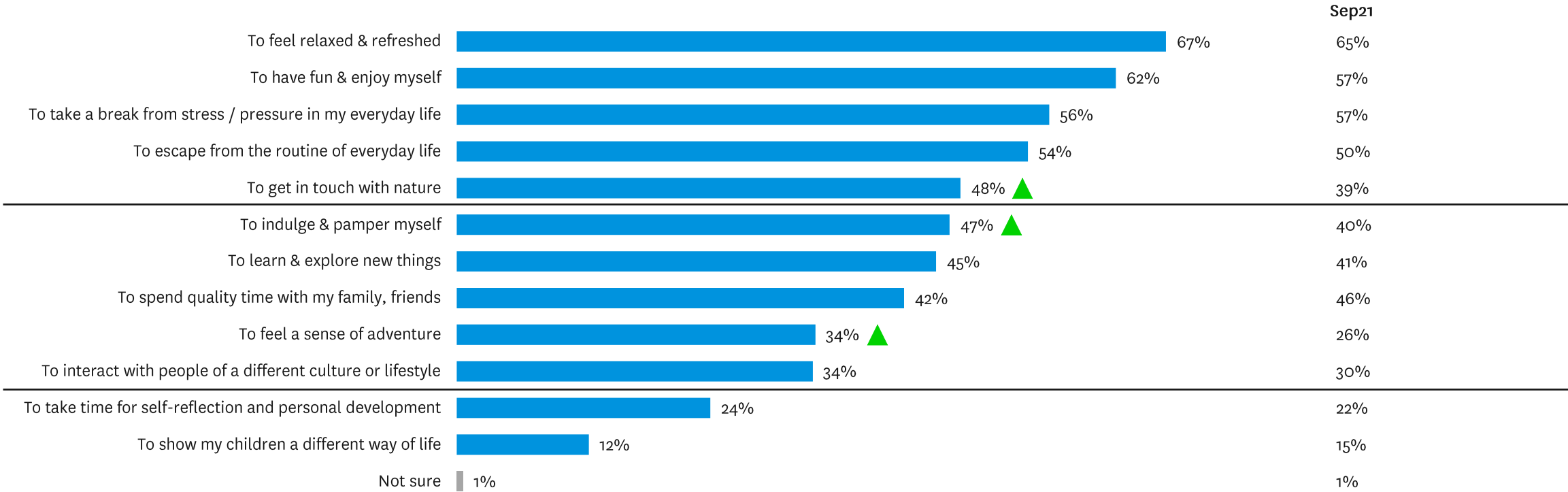
Q "Now that international travel is available again, which of the following are you most likely to do in the next 2 years?"



A need to relax, refresh and have fun continue to drive desire to take an overseas holiday while there is a growing need to get in touch with nature and to indulge

Needs or reasons that will most strongly drive desire to take an international leisure holiday

% Active Considerers | May 22



▲ ▼ Significantly higher / lower than last wave at 95%



Notes:

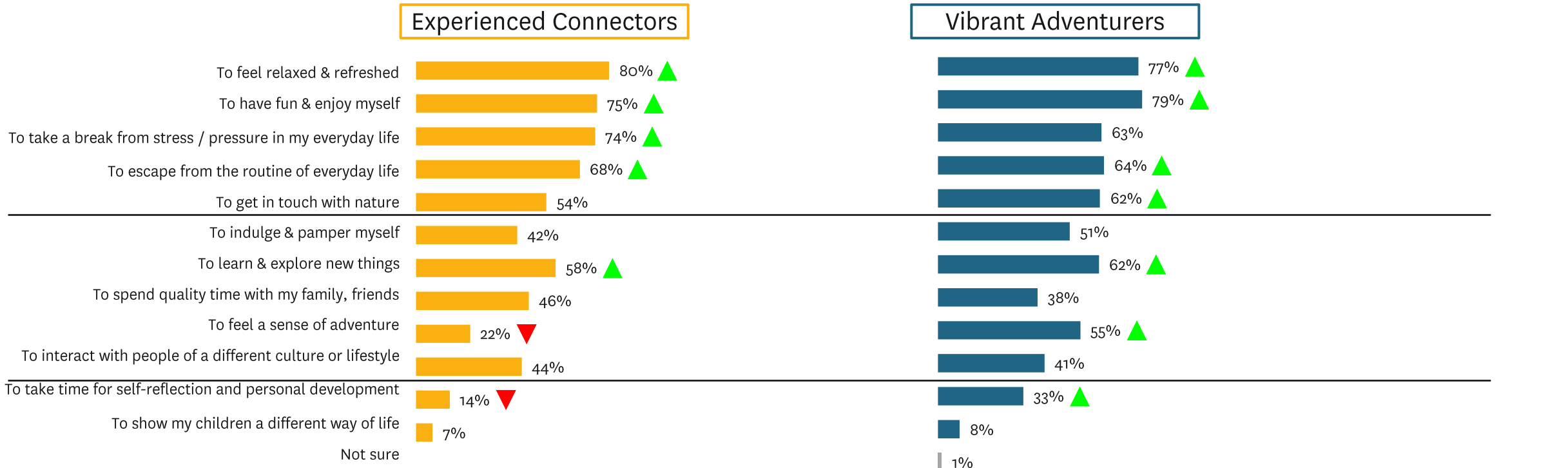
1. Sample size: Sep 21, May22 n = 500, 499
Q "Which of these needs or reasons will most strongly drive your desire to take an international leisure holiday"



A need to relax, refresh and have fun are particularly high among Experienced Connectors and Vibrant Adventurers, as is the need to take a break, escape everyday life, and learn and explore new things

Needs or reasons that will most strongly drive desire to take an international leisure holiday

% Active Considerers by Mindset | May 22



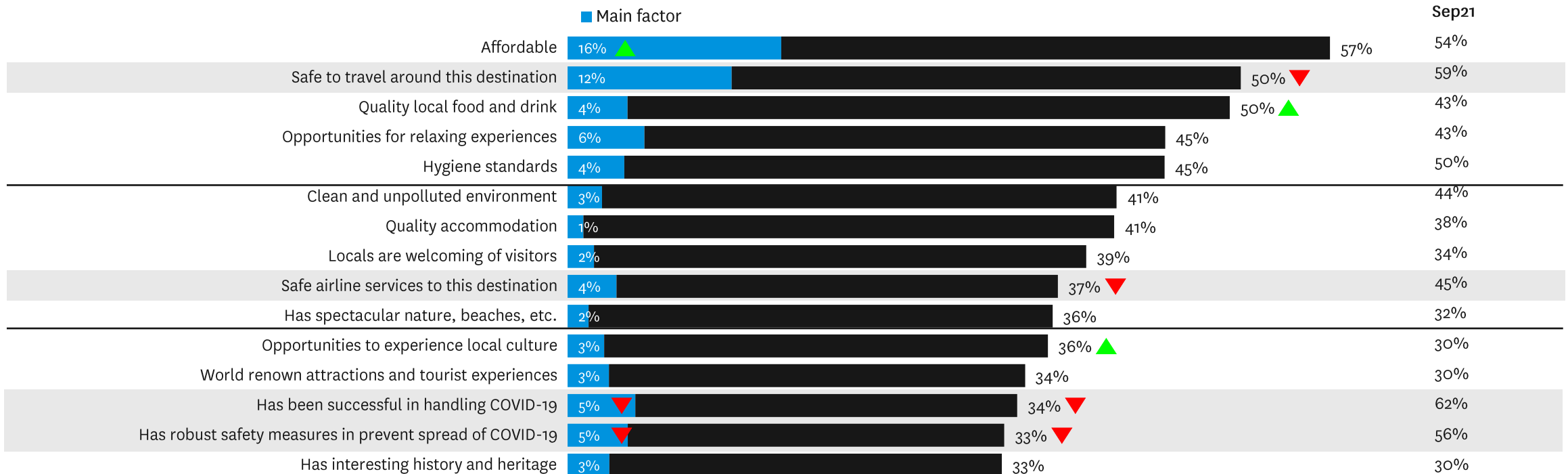
▲ Significantly higher / lower than other mindsets



Affordability is becoming more important as ACs seek and compare destinations to travel to, while signs of safety and successful handling of COVID-19 is becoming less of a priority

Destination attributes / factors sought for next overseas holiday destination

% Active Considerers | May 22



Notes:

1. Sample size: Sep 21, May 22 n = 500, 499
 Q "Which of these destination attributes will you be looking for when choosing your next overseas holiday destination?"
 Q "And which of these attributes would be the most important one?"



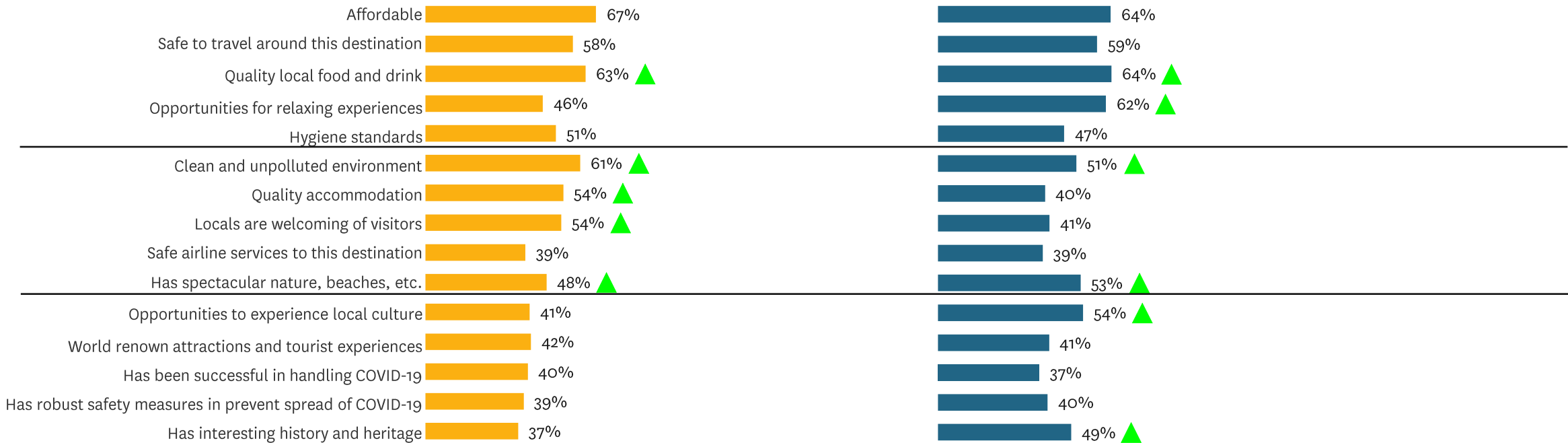
While there is some variation by mindset in terms of destination attributes sought, affordability is key for all segments

Destination attributes / factors sought for next overseas holiday destination

% Active Considerers by Mindset | May 22

Experienced Connectors

Vibrant Adventurers



▲ Significantly higher / lower than other mindsets



Notes:

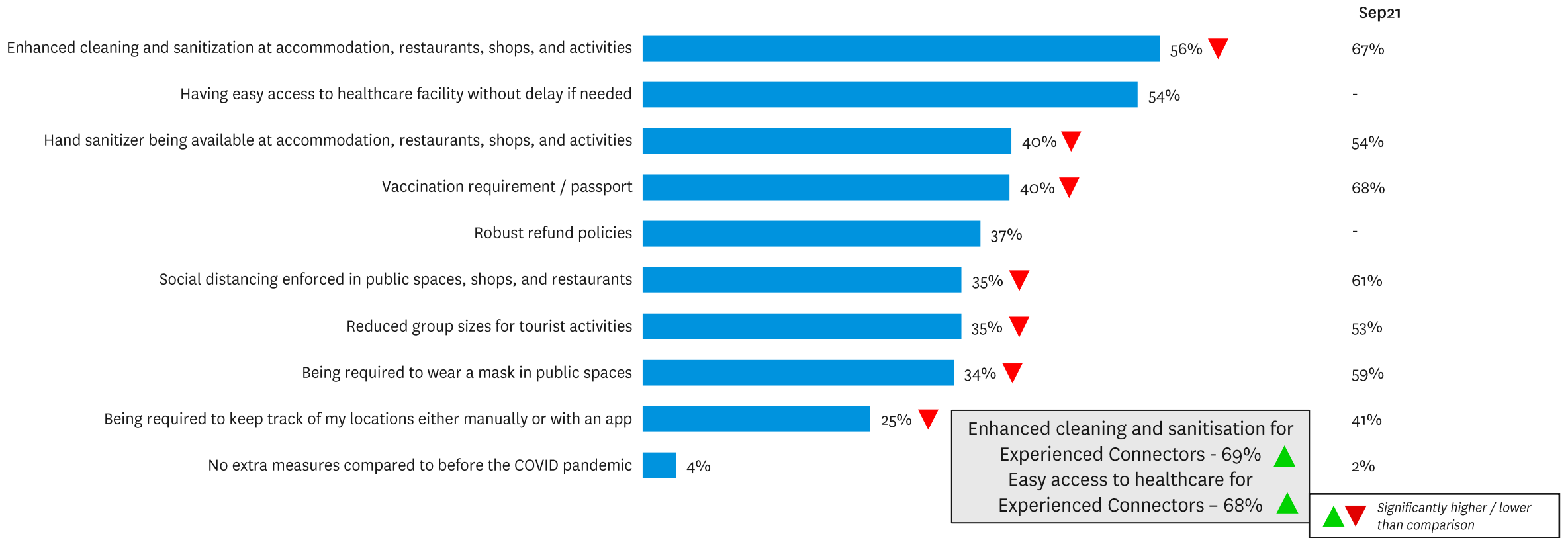
1. Sample sizes: ACs May 22 n = 68 | 84 | 85, ordered reasons by 'Total ACs'



Sanitisation and ease of access to healthcare are the most common Covid-19 safety measures that ACs would like to see implemented

Measures would like to see implemented at destination to feel safe

% Active Considerers | May 22



Notes:

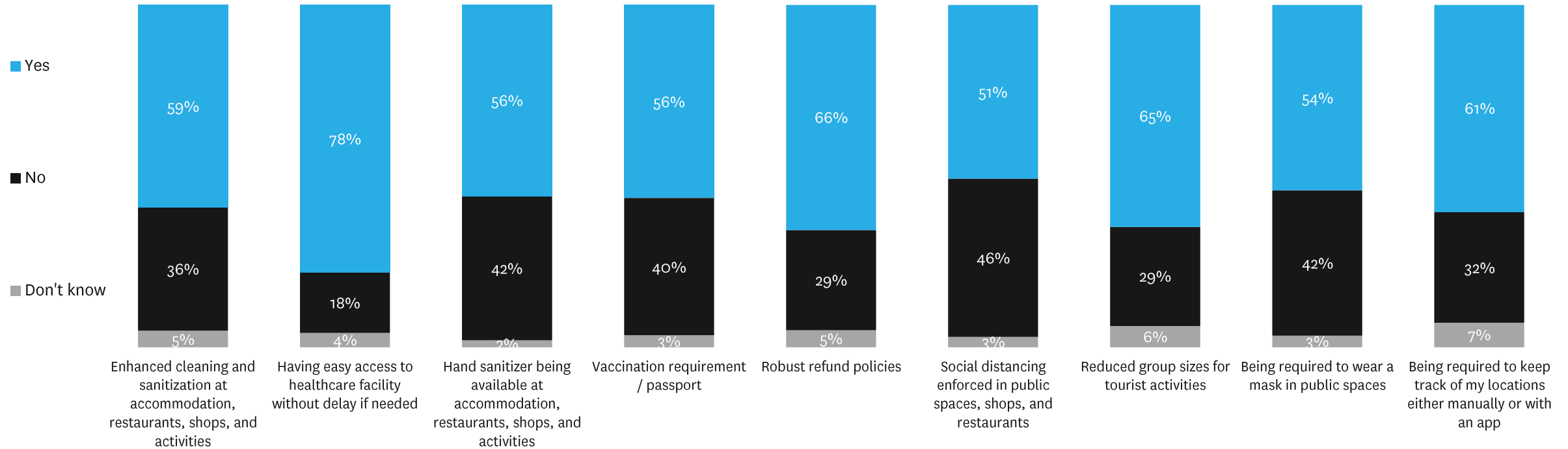
1. Sample size: May 22 n = 499, Sep 21 n = 500
 Q "Which of the following measures you would you like to see implemented at the destination so you could feel safe?"



Singaporean ACs would be open to pay extra for additional measures that would make them feel safe from Covid, particularly ease of access to healthcare

Attributes willing to pay for

% Active Considerers | May 22

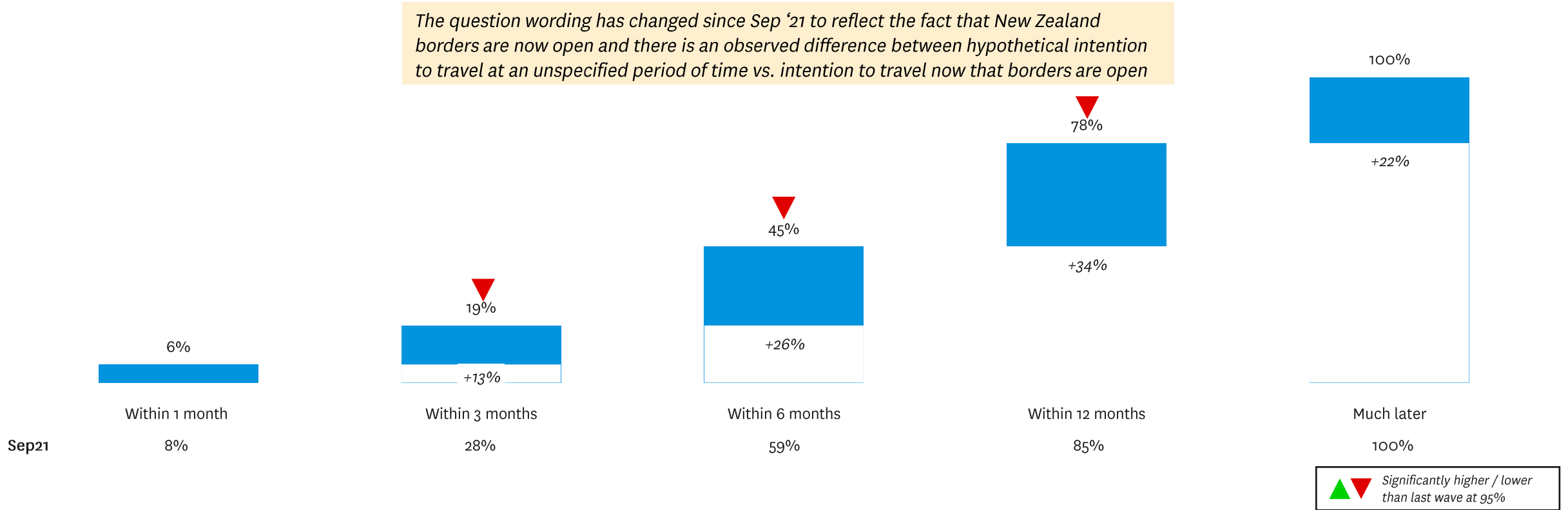


Now that New Zealand borders are open, 45% ACs see themselves travelling to New Zealand within the next 6 months

Speed of New Zealand holiday demand now that borders are open

% Active Considerers | May 22

The question wording has changed since Sep '21 to reflect the fact that New Zealand borders are now open and there is an observed difference between hypothetical intention to travel at an unspecified period of time vs. intention to travel now that borders are open



Notes:

1. Sample sizes: Sep 21, May 22 n = 500, 499

Question wording

Sep 22 "After international travel restrictions are lifted and flights are available again, how soon would you want to travel to New Zealand for a holiday?"

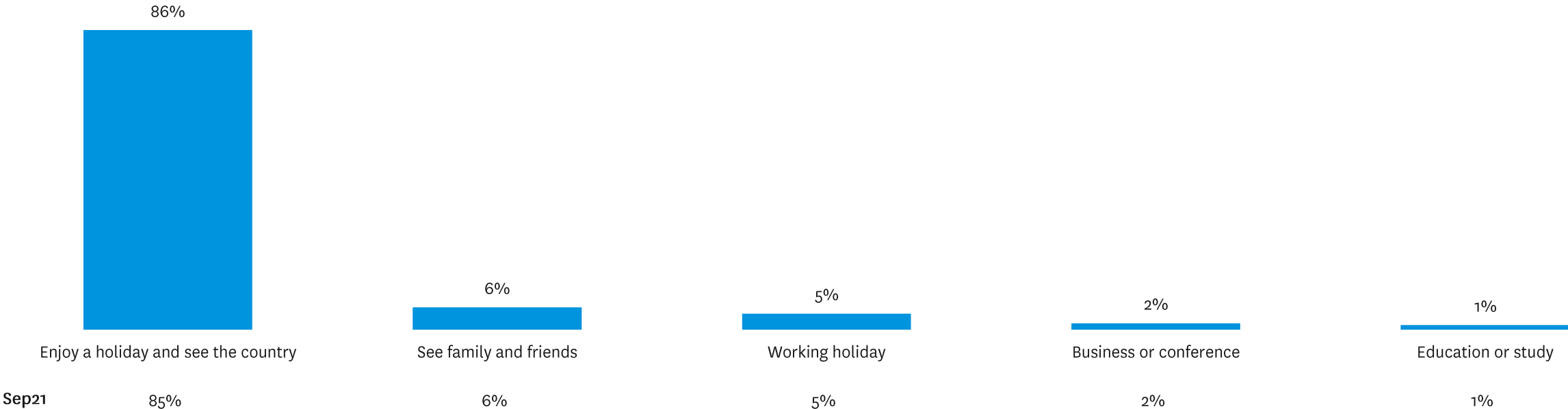
Apr 22 "New Zealand borders are now open to tourists. How soon do you how soon would you want to travel to New Zealand for a holiday?"



The key reason to book a trip to New Zealand will be to enjoy a holiday and see the country

Key reason why book a trip to New Zealand

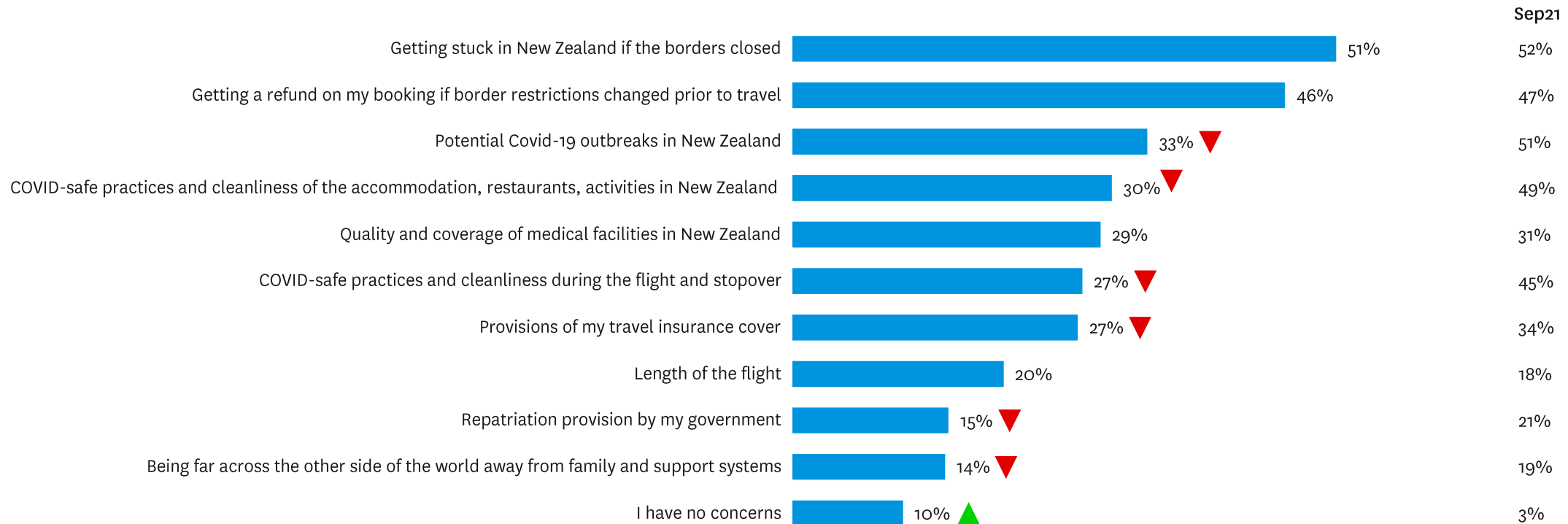
% Active Considerers | May 22



The biggest concerns for ACs when it comes to committing to booking a holiday are getting stuck in New Zealand and/or not getting a refund if border restrictions were to change, but overall, concerns are decreasing

Biggest concern when it comes to committing to booking a holiday in New Zealand

% Active Considerers | May 22



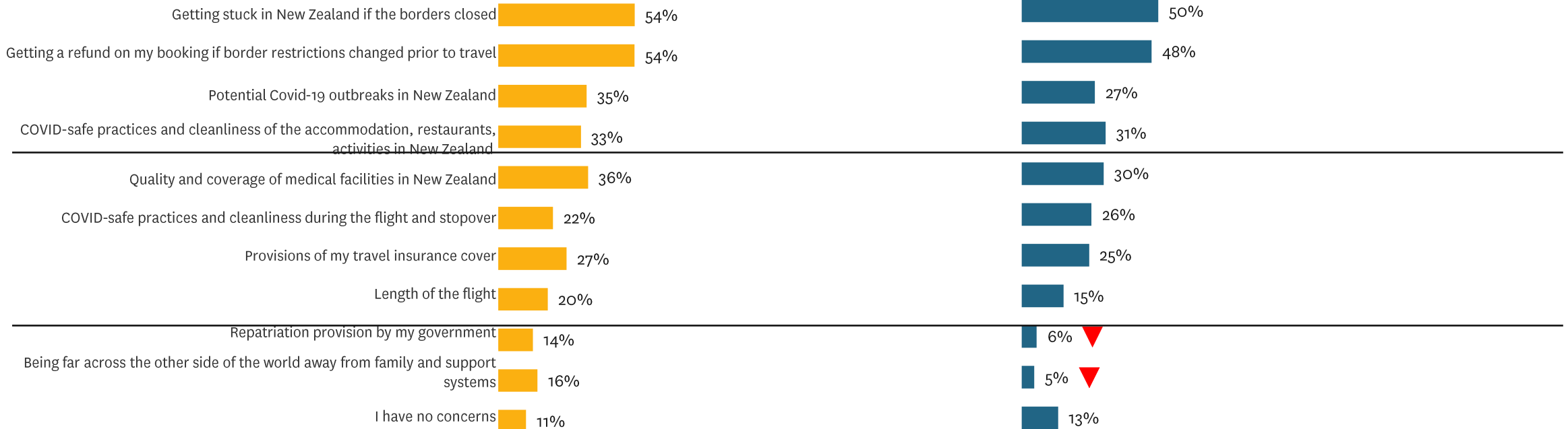
Getting stuck in New Zealand and/or not getting a refund if border restrictions were to change are the most common concerns across priority mindsets

Biggest concern when it comes to committing to booking a holiday in New Zealand

% Active Considerers by Mindset | May 22

Experienced Connectors

Vibrant Adventurers



▲ ▼ Significantly higher / lower than other mindsets



4

Key channels



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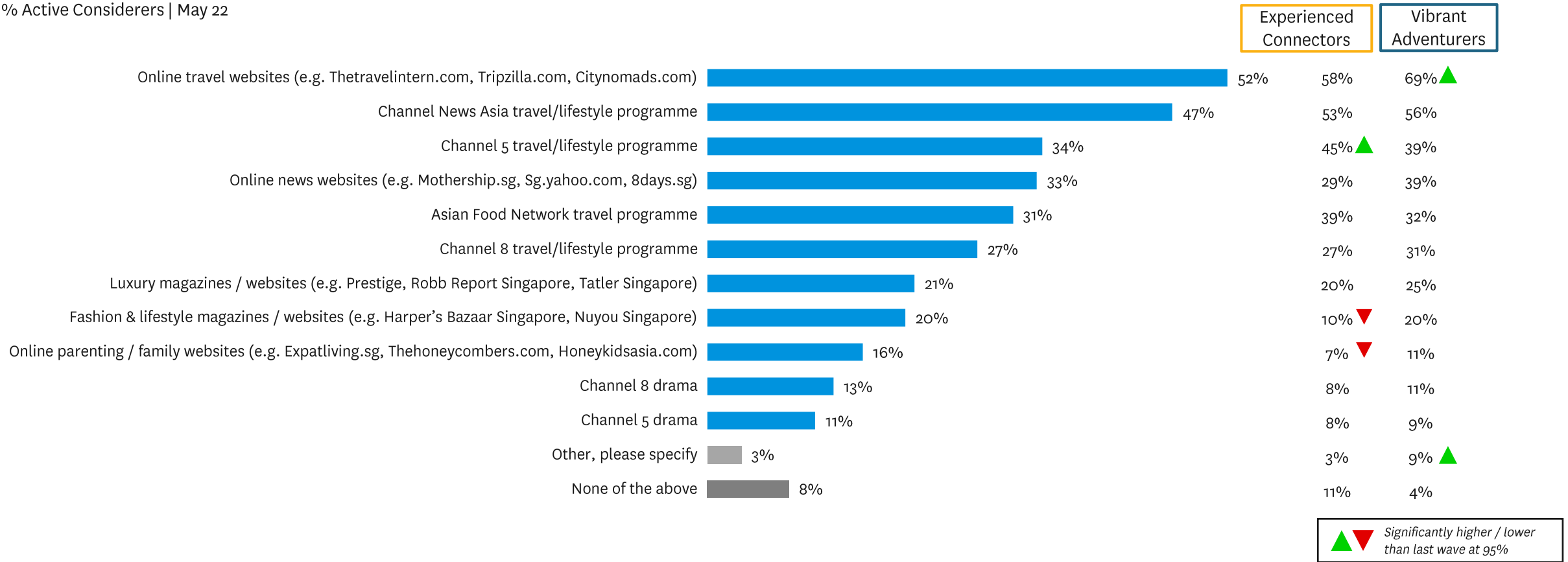


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Travel inspiration for ACs is derived from multiple channels, most notably online travel websites and Channel News Asia

Media channels for travel inspiration

% Active Considerers | May 22



Notes:

1. Sample size n = 499

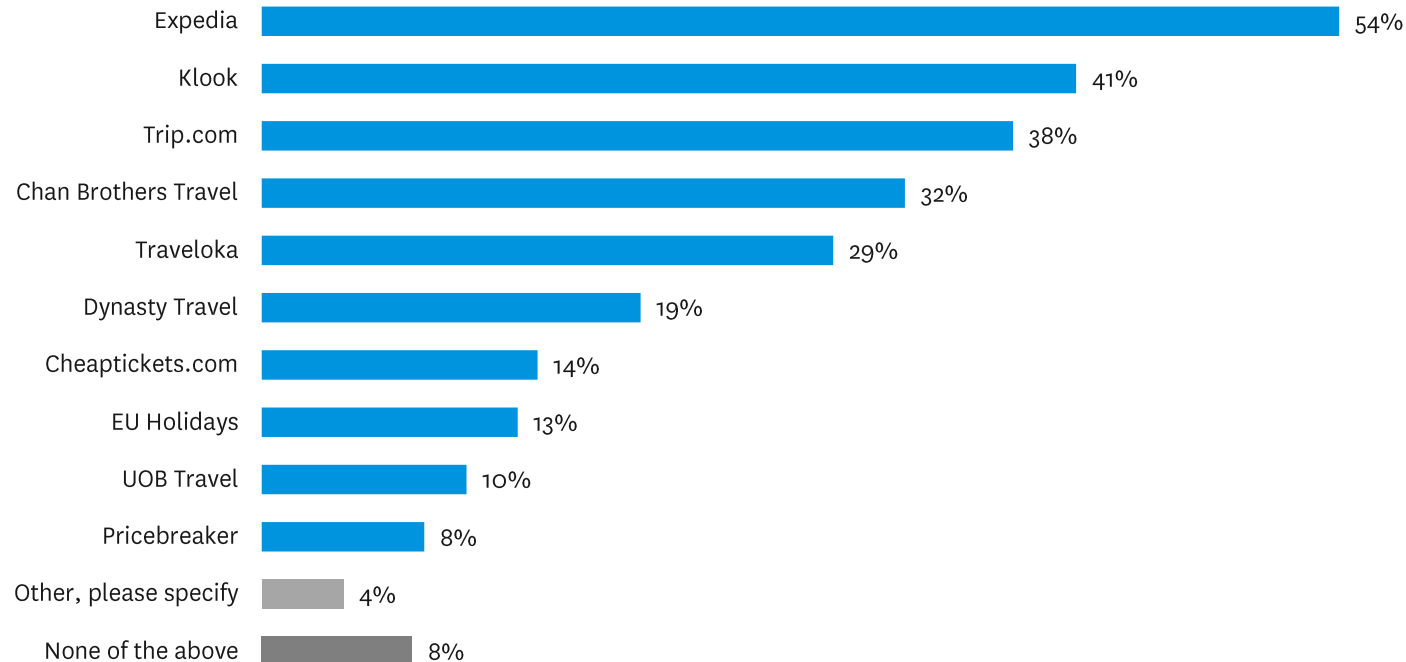
Q "Which of these media channels influences your consideration of a travel destination?"



Expedia is the top media channel used for booking travel

Channels for booking travel

% Active Considerers | May 22



	Experienced Connectors	Vibrant Adventurers
	57%	63%
	30% ▼	48%
	42%	41%
	43%	31%
	25%	25%
	10% ▼	14%
	18%	17%
	17%	7%
	5%	5%
	2% ▼	5%
	8%	5%
	4%	6%

▲ ▼ Significantly higher / lower than last wave at 95%



Notes:

- 1. Sample size n = 499
- Q "Which of the below are your preferred channels to book an international holiday?"



ACs are most likely to book flights directly with an airline or via travel aggregators while booking accommodation through travel aggregator websites

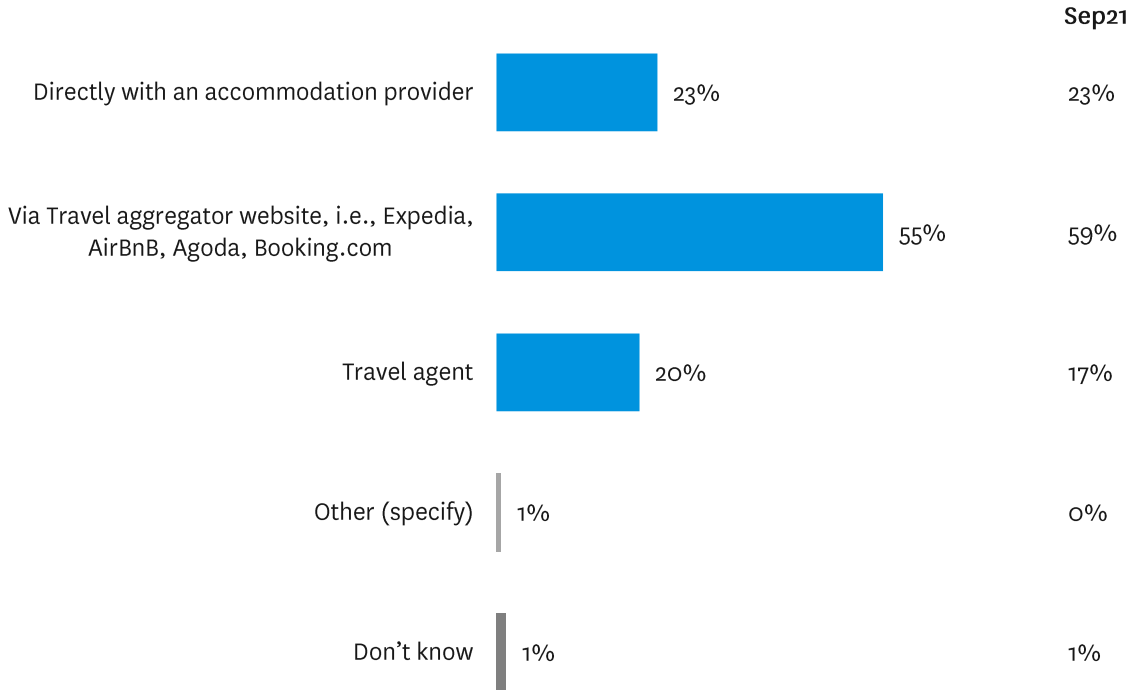
Preference to book flights to New Zealand

% Active Considerers | May 22



Preference to book your accommodation in New Zealand

% Active Considerers | May 22



Notes:
 1. Sample size: Sep 21, May 22 n = 500, 499
 Q "How would you prefer to book your flights to New Zealand?"
 Q "How would you prefer to book your accommodation in New Zealand?"



5

Appendix



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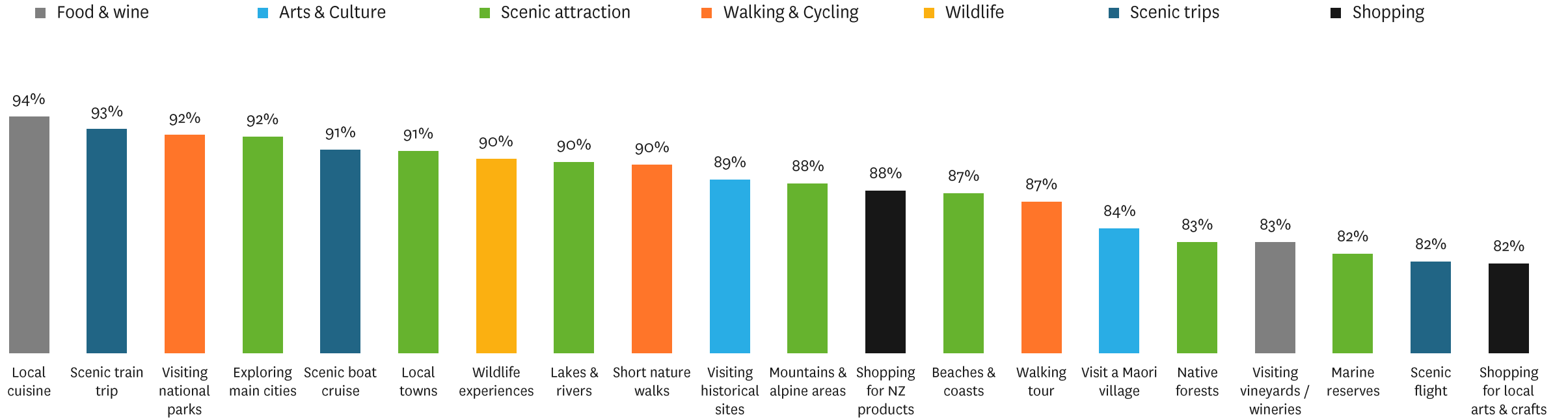


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Singaporean ACs show interest in a wide range of activities

Activities interested in doing in New Zealand (Top 20)

% Active Considerers | May 22



Notes:

1. Sample size: n = 499

Q "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"



Now that New Zealand borders are open, 38% of Elephants see themselves travelling to New Zealand within the next 6 months

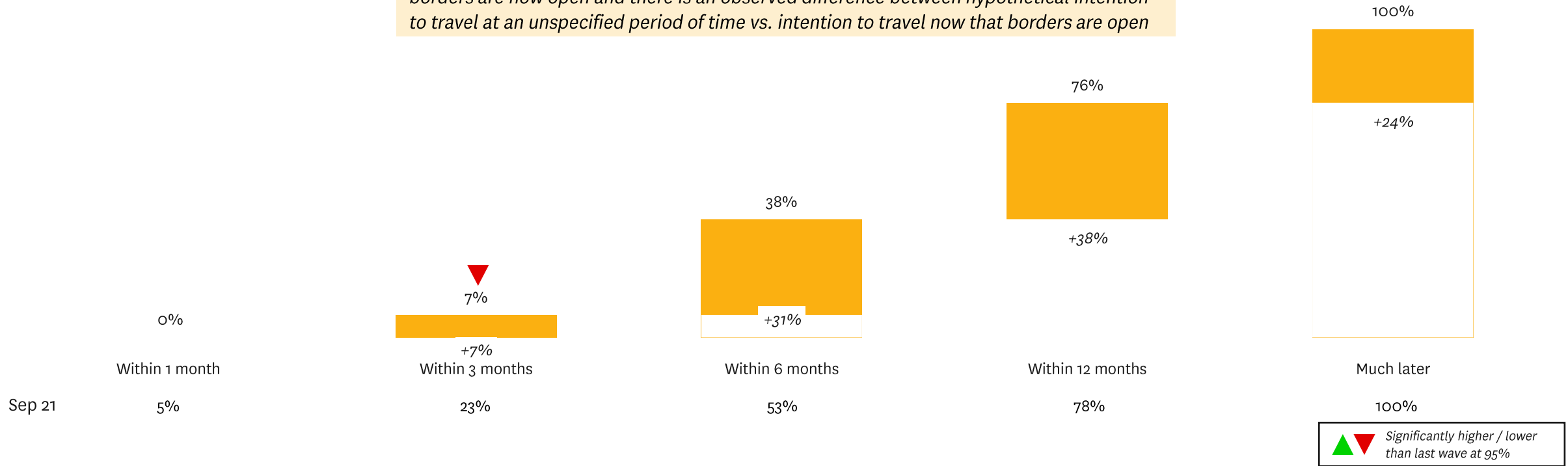
CAUTION SMALL SAMPLE

Speed of New Zealand holiday demand recovery after restrictions are lifted

% Active Considerers by Mindset 2 (The Elephants) | May 22



The question wording has changed since Sep '21 to reflect the fact that New Zealand borders are now open and there is an observed difference between hypothetical intention to travel at an unspecified period of time vs. intention to travel now that borders are open



▲ ▼ Significantly higher / lower than last wave at 95%



Now that New Zealand borders are open, 34% Lions see themselves travelling to New Zealand within the next 6 months

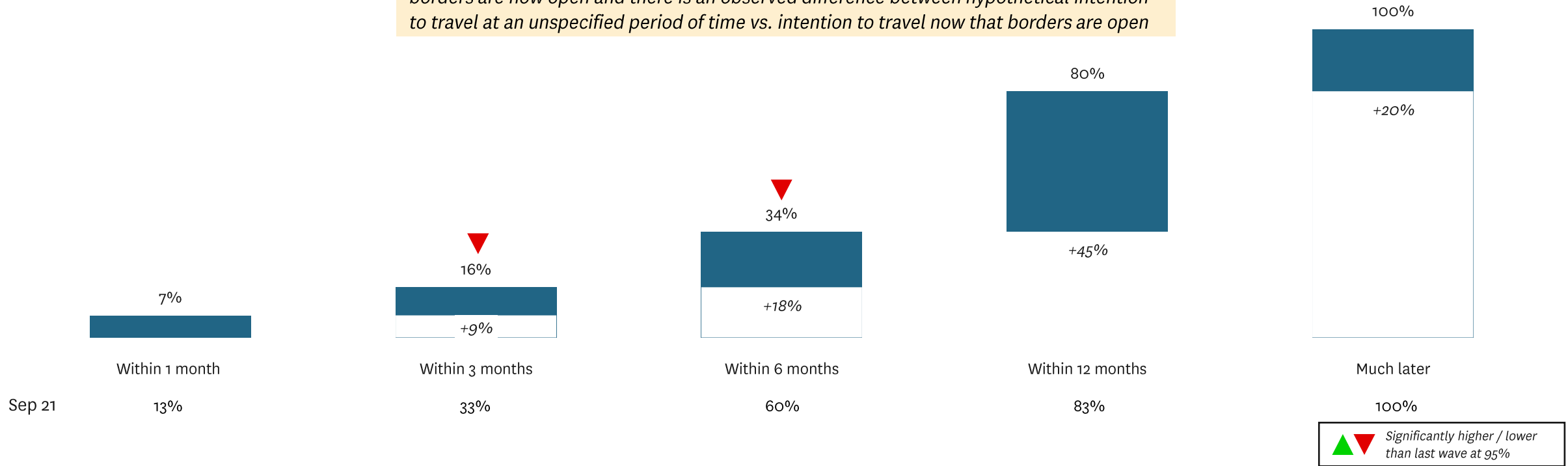
CAUTION SMALL SAMPLE

Speed of New Zealand holiday demand recovery after restrictions are lifted

% Active Considerers by Mindset 3 (The Lions) | May 22



The question wording has changed since Sep '21 to reflect the fact that New Zealand borders are now open and there is an observed difference between hypothetical intention to travel at an unspecified period of time vs. intention to travel now that borders are open



Now that New Zealand borders are open, 47% Peacocks see themselves travelling to New Zealand within the next 6 months

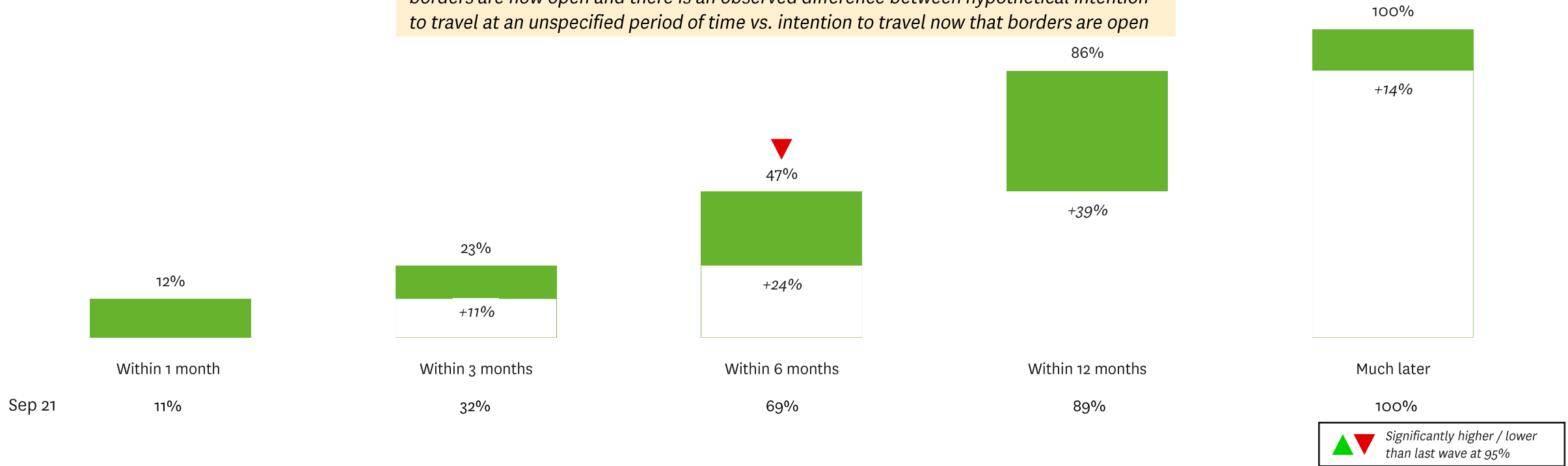
CAUTION SMALL SAMPLE

Speed of New Zealand holiday demand recovery after restrictions are lifted

% Active Considerers by Mindset 5 (The Parrots) | May 22



The question wording has changed since Sep '21 to reflect the fact that New Zealand borders are now open and there is an observed difference between hypothetical intention to travel at an unspecified period of time vs. intention to travel now that borders are open



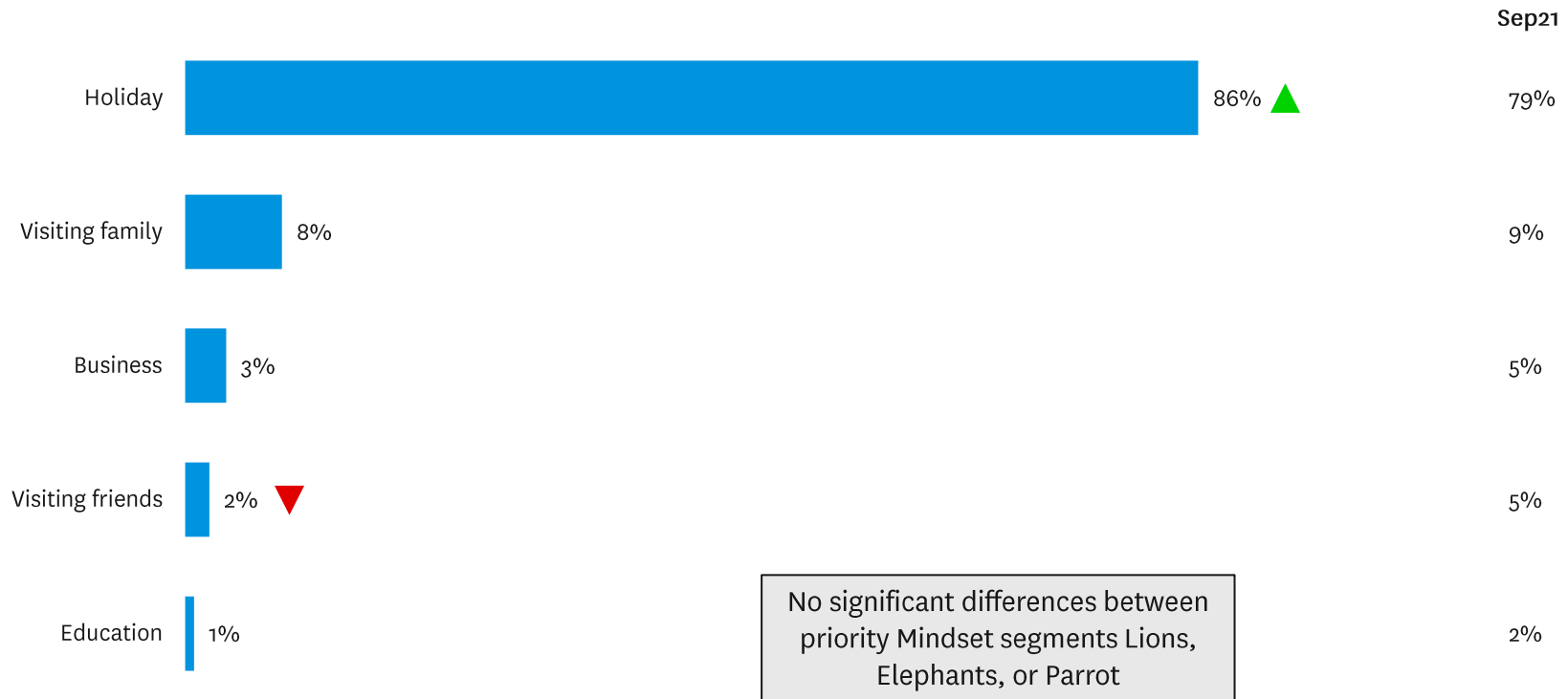
▲ ▼ Significantly higher / lower than last wave at 95%



The main reason for the next overseas trip is most likely to be leisure

Main reason for the next overseas trip

% Active Considerers | May 22



▲ ▼ Significantly higher / lower than last wave at 95%



Notes:

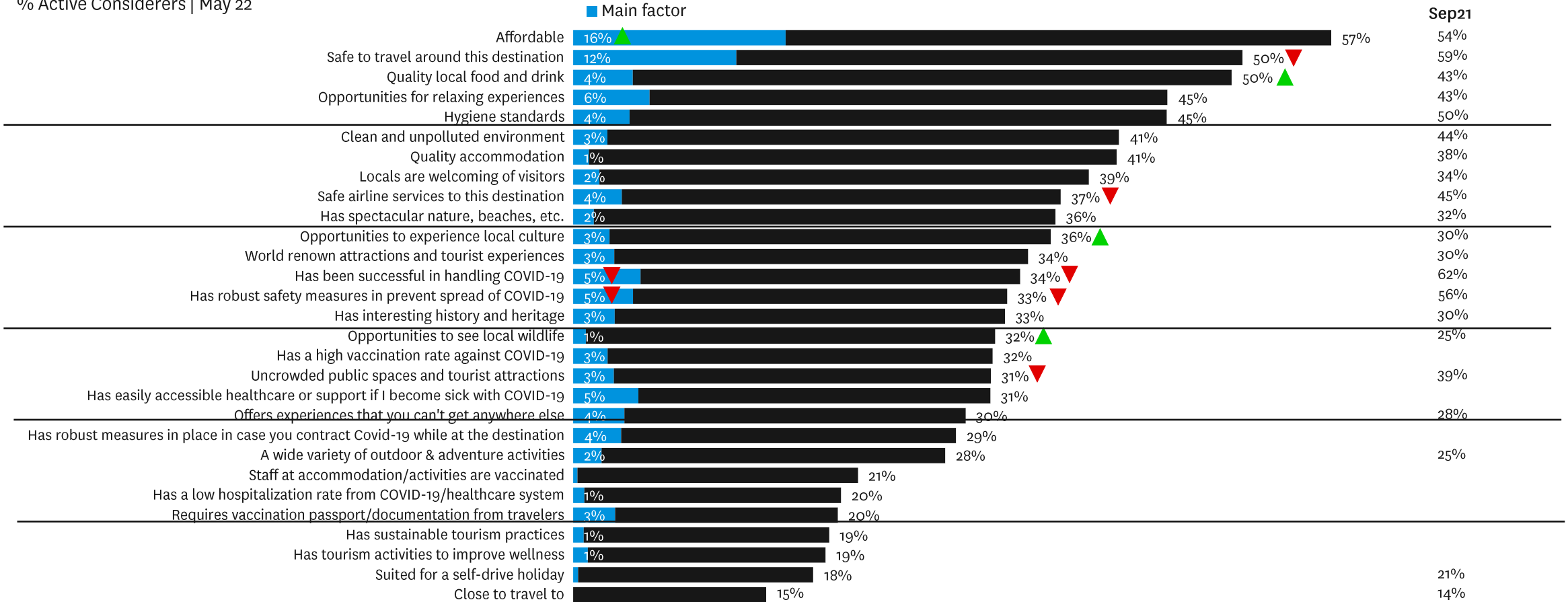
1. Sample size: Sep 21, May 22 n = 500, 499
Q "What will be the reasons for your next overseas trip?"



Successful handling of the Covid-19 and on-going health measures will play a key part in ACs choice of holiday destinations

Destination attributes / factors after international travel restrictions are lifted

% Active Considerers | May 22



Notes:

1. Sample size: Sep 21, May 22 n = 500, 499

Q "Which of these destination attributes will you be looking for when choosing your next overseas holiday destination?"

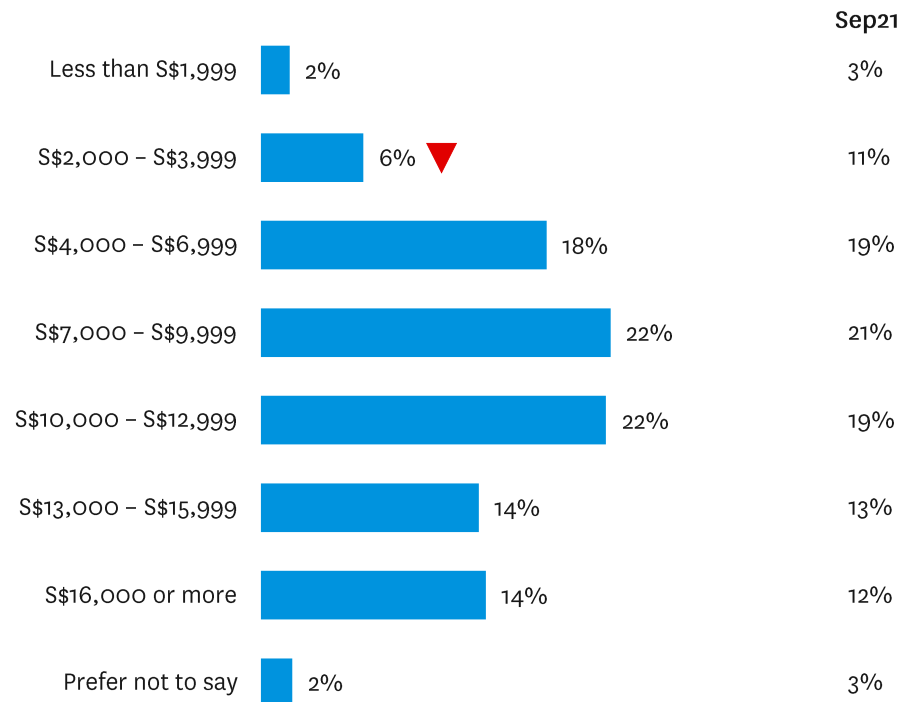
Q "And which of these attributes would be the most important one?"



ACs are most likely to book flights and accommodation through travel aggregator websites

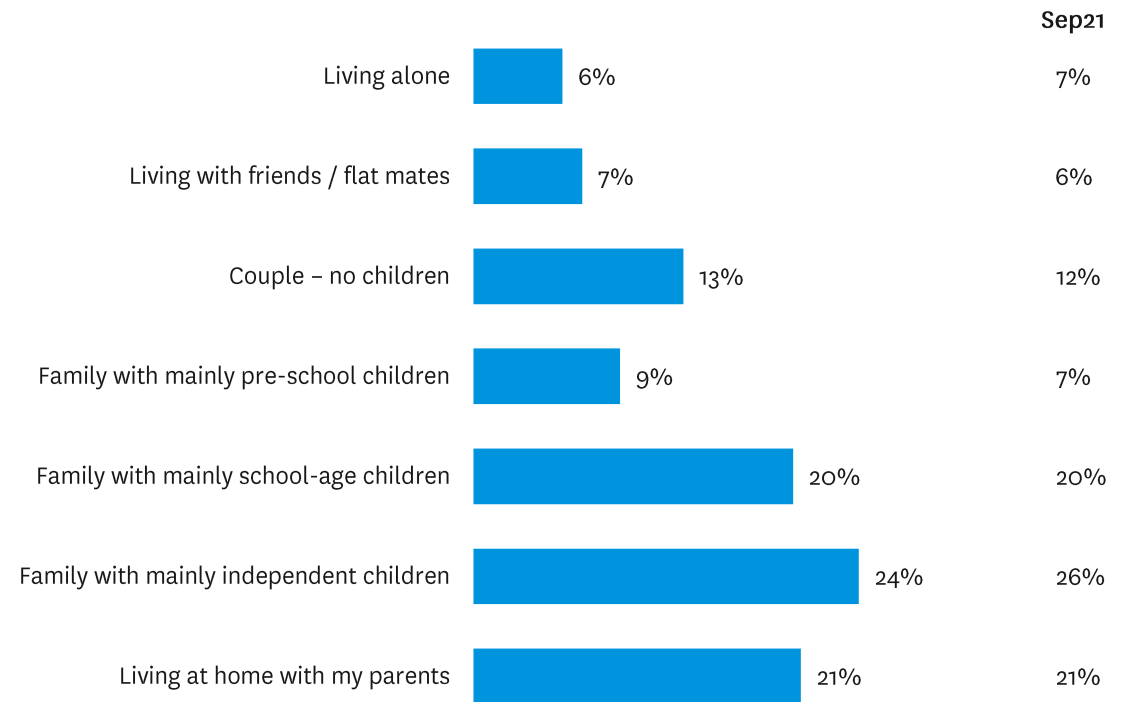
Monthly household income

% Active Considerers | May 22



Household composition

% Active Considerers | May 22



Notes:

- 1. Sample size: Sep 21, May 22 n = 500, 499
- Q "What is your total monthly household income?"
- Q "Which of these best describes your household?"



Full wording for the preference drivers

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
Amazing beaches	Has amazing beaches
Blending in with locals	Ideal for blending in with locals and not being seen as a tourist
Challenging	Ideal for physically and mentally challenging yourself
Clean & unpolluted	The environment there is clean and unpolluted
Comfortable	I'd feel comfortable visiting, despite any cultural differences
Easy to travel around	It's easy to travel around to see and do things
Embraces visitors	A destination that embraces visitors and wants them to enjoy their time there
Excitement	Thinking about visiting makes me feel really excited
Family friendly	Ideal for a family holiday
Friendly people	The locals are friendly and welcoming
Fun & enjoyment	Ideal for having fun and enjoying yourself
History & heritage	Offers opportunities to experience history and heritage
Iconic attractions	Has iconic attractions and landmarks

Shorthand	Full wording
Interesting cities	Has interesting cities to visit
Landscapes & scenery	Spectacular natural landscapes and scenery
Local culture	Offers opportunities to experience local culture
Local experiences	Offers opportunities to experience how it is to live like a local
Place to escape	Ideal for escaping normal daily life
Popular	A popular destination that lots of people want to visit
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
See lots without travelling far	Once there, you can see a lot without having to travel far
Unique experiences	Offers experiences that you can't get anywhere else
Unique wildlife	Opportunities to see local wildlife
Working holiday	Ideal for a longer term working holiday



Appendix: brand positioning ‘how to’

ACs are biased towards 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	Competitor 1	Competitor 2	Competitor 3	Competitor 4	Competitor 5
Landscapes & scenery						
Safe destination						
Embraces visitors						
Range of adventure						
Clean & unpolluted						
Fun & enjoyment						
Friendly people						
Range of experiences						
Unique experiences						
Comfortable						
Escape the troubles of the world						
Landscapes & scenery						

— We look at how a given number of competitors perform on a given number of attributes to derive an index that measures expected performance

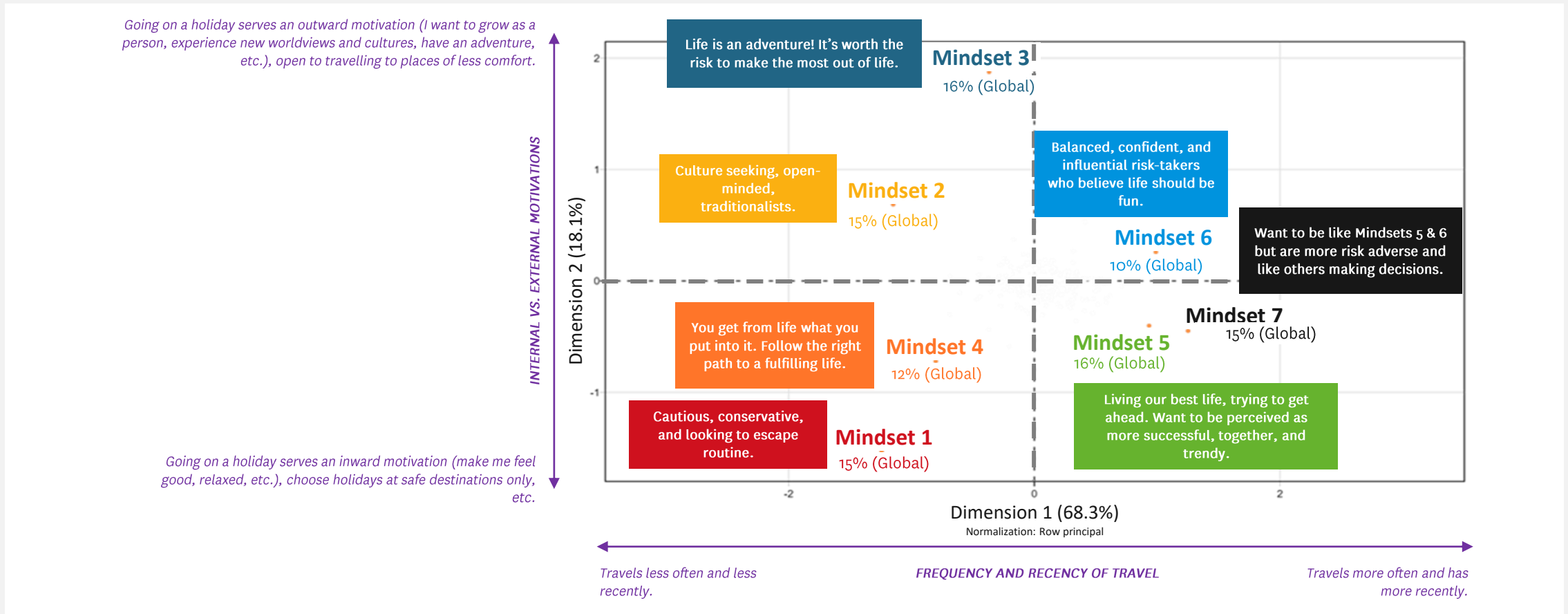
— It’s key to note that the score is relative – any change to the competitor and / or attribute sets will result in a change in the indices

— For example, if next quarter the top five competitors are different to the ones from this quarter, the scores reported for New Zealand next quarter will be different to the ones reported this quarter



Mindset Introduction

A Visual Representation



Mindset Introduction

Side-by-side



Mindset 1

"The Beavers"

These cautious close-to-homers avoid taking unnecessary risks in life, like consistency and predictability and letting others lead. They have concerns about safety and worry about the future. They follow rules and are late adopters and value family stability and thrift. Travel is less important, but they travel to escape routine, feel pampered and connect with others and it gives them a sense of rejuvenation, appreciating and excitement.



Mindset 2

"The Elephants"

These open-minded traditionalists like to make their own decisions, support their community and prefer to share credit. They value curiosity, authenticity learning & honesty. They travel for a different worldview, to learn new cultures and experience new things while spending time with others. They're confident travellers who like researching & value experience over money. They'll travel 10 hours plus and 2 + weeks for international holidays & feel grateful and appreciative for travel.



Mindset 3

"The Lions"

These adventurous risk takers like to make the most out of life. They like experimentation and prefer fun and open-minded, colourful settings and value freedom. Travel has a high importance, and they are motivated by uniqueness, adventure, and a different worldview. They like researching and will spend more to get off the beaten track. They're resilient & will sacrifice other things to travel, seeking less common destinations. Travel makes them feel bold and daring.



Mindset 4

"The Dolphins"

These self-reliant planners believe they get from life what they put into it. They avoid unnecessary risk and make their own decisions. Valuing duty, family, knowledge and wealth they like to pamper themselves when travelling and spend time with family and friends. They choose safe destinations, enjoy nature, escaping routine, cuisine and prefer to spectate. While they're less frequent travellers travel gives them joy, rejuvenation, freedom, confidence.



Mindset 5

"The Parrots"

These striving leaders are living their best life, getting ahead & want to be perceived as successful, trendy & important. They value adventure, status, wealth, excitement & romance. They travel to reconnect with self & others, explore nature and a different worldview. They tend to be spontaneous, will do a few shorter trips, avoid sightseeing & like packages & guided tours for ease of travel. Amazement, naughty & quirky are feelings they tap into while traveling.



Mindset 6

"The Penguins"

These balanced, confident achievers are open to risk-taking and experimentation and believe life should be fun. They tend to be influential and value wealth, status, excitement as well as tradition, social responsibility, freedom and loved ones. They travel often & to interesting places to meet people, learn cultures and reconnect with themselves and others. Travel gives them a sense of rejuvenation, joy, boldness and confidence.



Mindset 7

"The Peacocks"

These idealistic dreamers want to be like Parrots and Penguins but are more risk-averse in life and like it when others make decisions for them. While they value status and wealth, they prefer consistency. Something of a less-confident traveller, new is not that important, they like travelling locally & do little research or sightseeing. They tend to follow influencers and consult travel agents. They travel to reflect, grow and connect and feel understood.

