KANTAR

Active Considerer (AC) Monitor

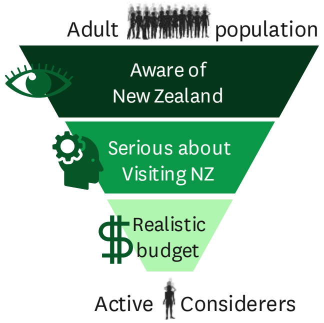
Asia Key markets (H1 FY24)

Report

January 2024

Appendix: AC Monitor research specifications

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



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

Performance Dashboard

	China Q4 FY23	China Q2 FY24	Japan Q4 FY23	Japan Q2 FY24
Incidence of Active Considerers[(1)]	50%	59%	9%	7%
NZ as a #1 Preferred destination[(2)]	82%	81%	66%	67%
First	66%	65%	41%	42%
Second	16%	16%	25%	25%
Dreaming	61%	62%	42%	38%
Planning	8%	5%	19%	23%
Booking	31%	34%	39%	39%

1. Sample sizes: Online population China Q4 FY23 (6MRA) n = 2011; Q2 FY24 (5MRA) n = 1909; Japan Q4 FY23 (6MRA) n = 16726; Q2 FY24 (5MRA) n = 17850
2. Sample sizes: ACs China Q4 FY23 (6MRA) n = 900; Q2 FY24 (5MRA) n = 750; Japan Q4 FY23 (6MRA); n = 901; Q2 FY24 (5MRA) n = 750

Performance Dashboard

Brand areas to focus on

	China – Strengths	China – Dial up	Japan – Strengths	Japan – Dial up
	Clean & unpolluted	Affordable to fly to	Clean & unpolluted	Excitement
	Escape the ordinary	Landscapes and scenery	Invites exploration	Fun and enjoyment
	Excitement	Friendly people	Indigenous culture	Family friendly
	Indigenous culture	Affordable activities	Wildlife experiences	Embraces all visitors
	Range of adventure	Embraces all visitors	Range of adventure	Easy to travel around

Top 5 competitors

(% selected destination in their top five preferred destinations)

China

Australia	Singapore	Hawaii	Bali	France
38%	32%	32%	31%	28%

Japan

Australia	Hawaii	Taiwan	Italy	Canada
54%	48%	34%	24%	23%

Top 5 knowledge gaps

China

1. How easy it is to travel around
2. How welcoming the locals are
3. What the weather is like
4. How safe it is from crime
5. How long it takes to travel between the main attractions

Japan

1. What the weather is like
2. How easy it is to travel around
3. The length of time required to fly to New Zealand
4. How safe it is from crime
5. How welcoming the locals are

Seasons

	China – Consideration	China – Preference	Japan – Consideration	Japan – Preference
Spring	38%	30%	36%	25%
Summer	32%	24%	41%	31%
Autumn	36%	25%	37%	25%
Winter	22%	14%	18%	11%

1. Sample sizes: ACs Q2 FY24 (current 5 months) China n = 750; Japan n = 750

Key insights

- China presents a significant opportunity to drive arrivals with 57.6 million potential ACs, of whom 65% list New Zealand as their top preferred destination and 27% are in the booking mindset – to convert these ACs, the focus should be on enhancing New Zealand's competitive positioning and addressing key concerns and barriers to booking
- Strategic brand messaging should focus on New Zealand's core holiday proposition with other elements such as its friendly and welcoming people and variety of adventure activities – all of which have emerged as stronger drivers of preference in 2023
- Brand messaging should also respond to key competitors such as Australia, Hawaii, Singapore and Bali, by:
    - Leveraging New Zealand's strengths in its pristine nature, exciting and unique opportunities and reputation as a place to relax and escape to
    - Additionally, it should focus on establishing a stronger competitive edge in its stunning landscapes and scenery, being a destination that embraces all visitors and invites exploration, its friendly people, and its affordability
- ACs consider spring to be the optimal season to visit New Zealand, presenting a strong opportunity to drive seasonal dispersal
- Following a considerable decline in appeal of New Zealand holidays and AC incidence during the pandemic, the last 2 years have seen significant recovery with the AC incidence rebounding from a low of 33% to 59%; however, there is still some way to go before reaching pre-pandemic levels of 69% thus efforts to continue to grow the pool should remain a consideration

Key insights

- Japan presents a sizeable immediate opportunity to drive arrivals, with 5.2 million potential ACs, of whom 42% list New Zealand as their top preferred destination and 33% 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 Australia and Hawaii
- To strengthen preference, focus on enhancing New Zealand's competitive edge on key drivers of preference
  - Strategic brand messaging should leverage New Zealand's strengths in inviting exploration through its stunning landscapes, unique experiences and range of adventure – all of which is within a pristine environment
  - Additionally, efforts should be on shaping perceptions of New Zealand as a destination that exudes fun and excitement and is family friendly and welcoming to all
- To shift ACs through the funnel, tactical messages should fill in key knowledge gaps around weather conditions, the ease of travelling around and the length of time it takes to fly to New Zealand do so – messages should be surfaced as early as the dreaming phase
- While preference to visit New Zealand is strongest in the summer, particularly among priority mindsets, there is an opportunity to drive seasonal dispersal with both spring and autumn offering similar levels of opportunity
- Following a decline post-pandemic, the appeal of New Zealand and AC incidence have yet to show signs of recovery and with an AC incidence of 7%, the AC pool is significantly smaller than it was pre-pandemic (10% in Q3 FY20) – thus, efforts to grow the pool should remain a focus

CHINA


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

Active Considerer journey funnel – China

Active Considerers definition

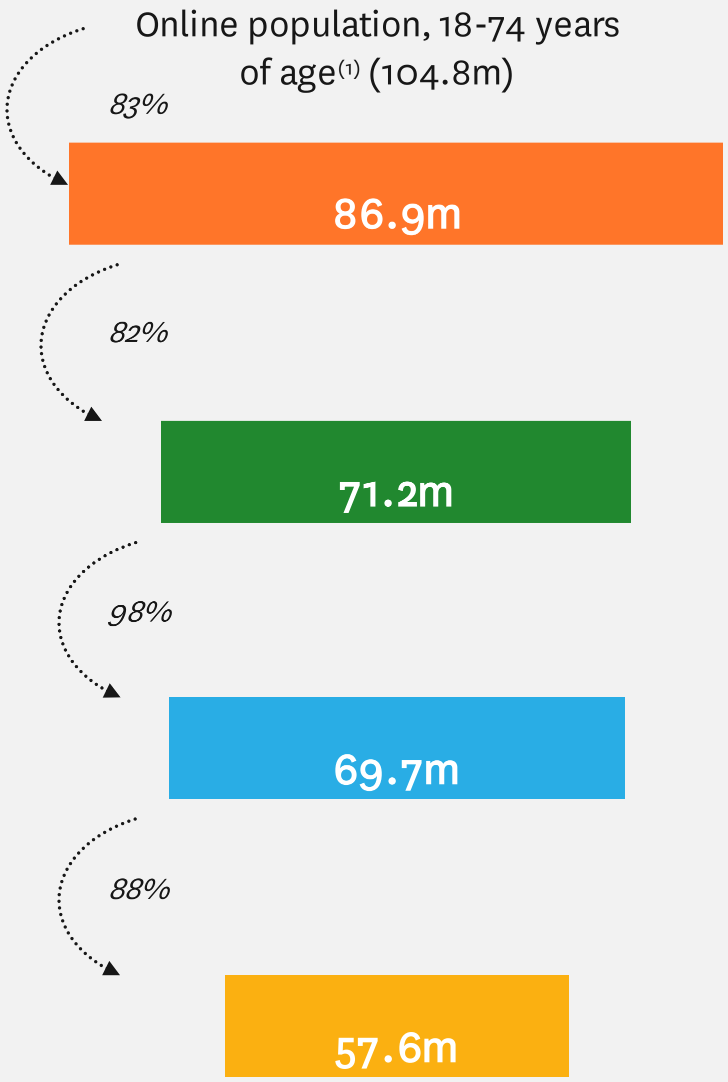
Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation and have a realistic budget for their visit (12,500 yuan per person on a holiday to New Zealand).

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

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

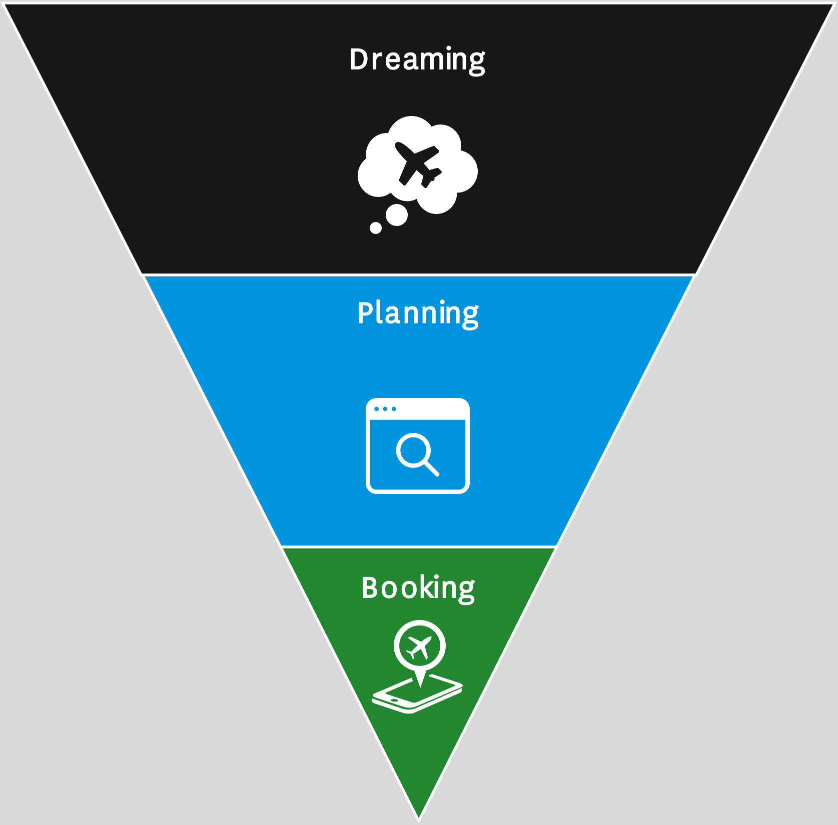
New Zealand is a preferred destination for their next holiday, and...

Willing to spend at least 12,500 yuan per person on a holiday to New Zealand[2]



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

Journey funnel to New Zealand - China



Book to come to NZ
Moment of Truth

Size (%)

	Active Considerers (57.6m)	ACs	Priority Mindset Group
Dreaming	36.3m	63%	60%
Planning	5.8m	10%	4%
Booking	15.6m	27%	36% ▲

Comments

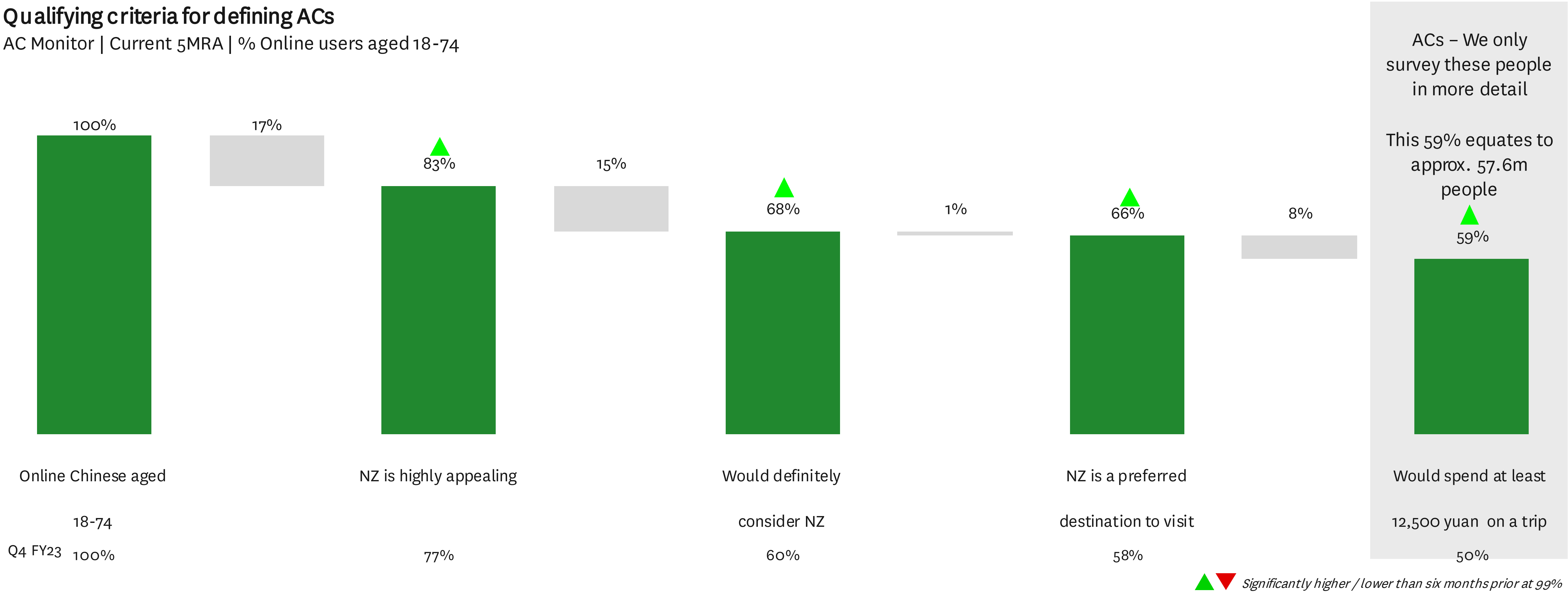
- ‘Ready to book’ is a claimed state of mind
- It doesn’t mean ACs will book a flight tomorrow if possible to do so, but that the commitment to visit New Zealand is there, and they feel confident enough to consider it a place they’d book travel to
- A number of extrinsic (e.g. price, availability) and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

The opportunity in China is significant and growing, reaching a potential market size of 57.6 million ACs

Qualifying criteria for defining ACs

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



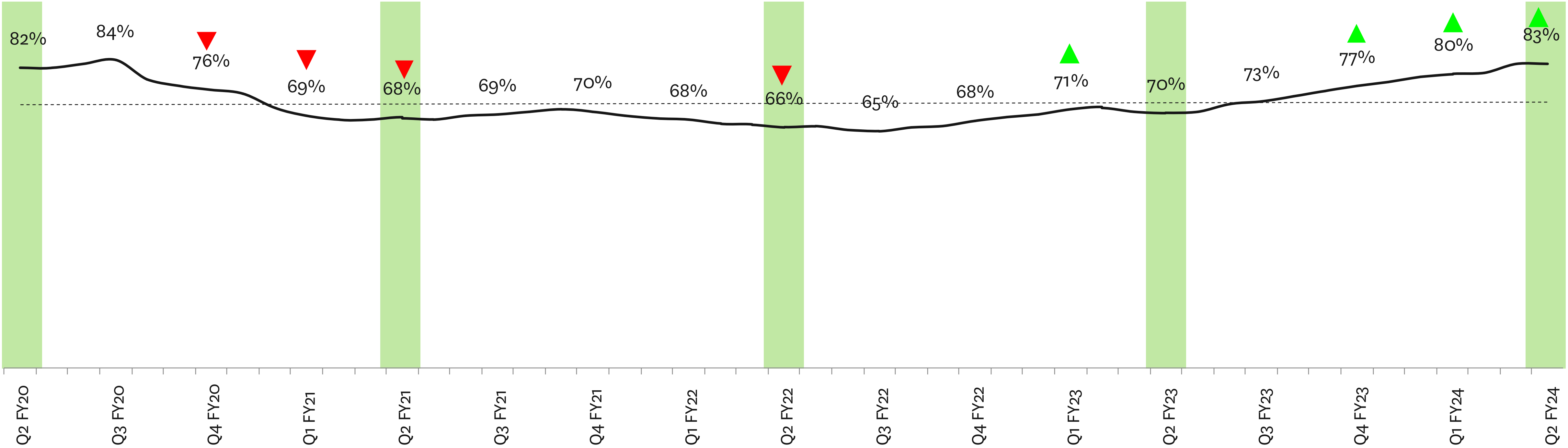
1. The approx. AC pool size is based on the online population estimates as of December 2023 and the AC incidence rate for the current five months
2. Sample size: n = 1909; Q4 FY23 n = 2011

Following a considerable decline in appeal for New Zealand throughout the pandemic, it has since rebounded to pre-pandemic levels

Appeal

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

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



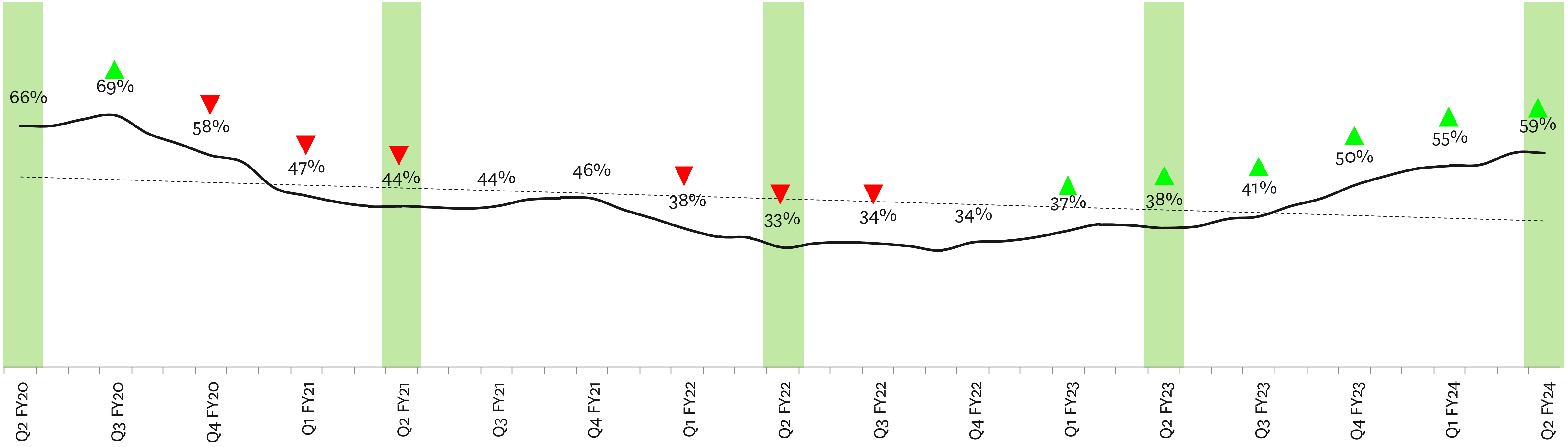
Significantly higher / lower than six months prior at 99%

1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 1361, 1338, 1592, 1964, 2095, 2641, 2558, 2531, 3025, 2921, 3029, 2851, 2637, 2432, 2011, 2357, 1909
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

Over the last year, the AC incidence has had a strong growth momentum, reaching a post-pandemic high of 59%

Incidence of ACs

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



Significantly higher / lower than six months prior at 99%

1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 1361, 1338, 1592, 1964, 2078, 2623, 2557, 2531, 3025, 2921, 3029, 2851 2637, 2423, 2011, 2357, 1909
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 12,500 yuan while holidaying in New Zealand

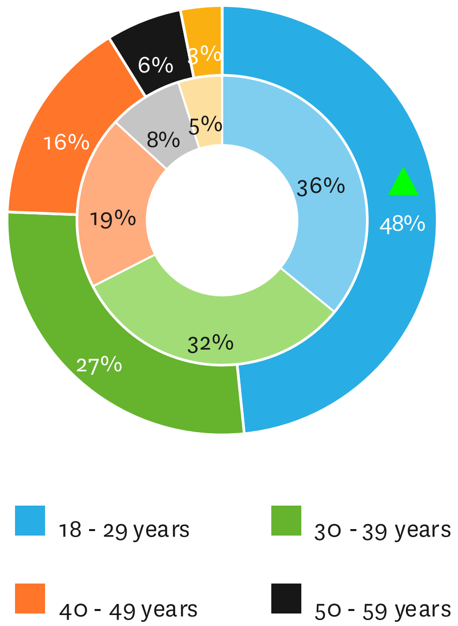
Those aged under 40 years old make up 76% of ACs; the priority mindsets make up 42% of ACs

Profile of Active Considerer

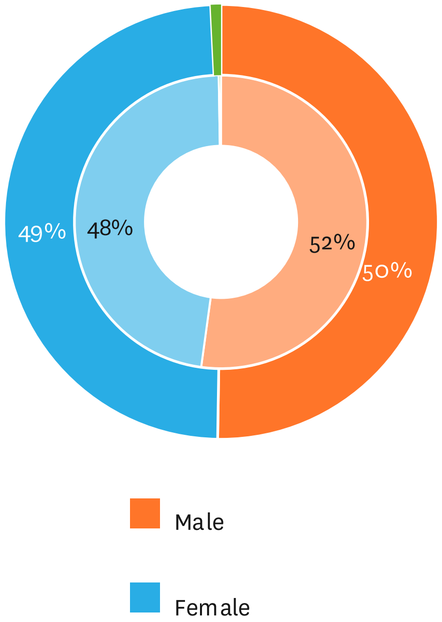
AC Monitor | Current 5MRA | Active Considerers vs Non-Active Considerers

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

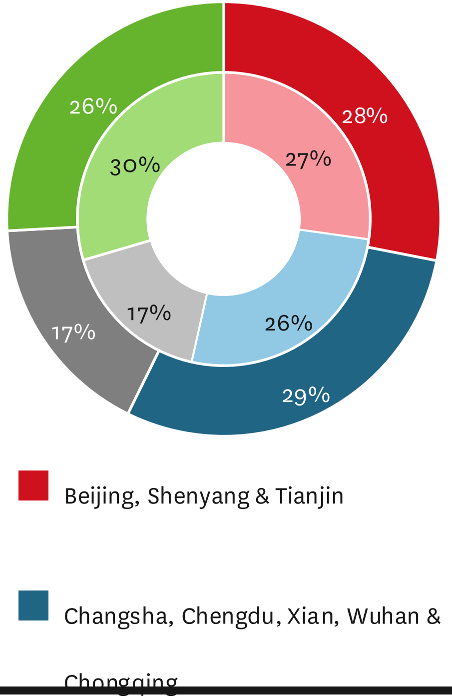
By age segment



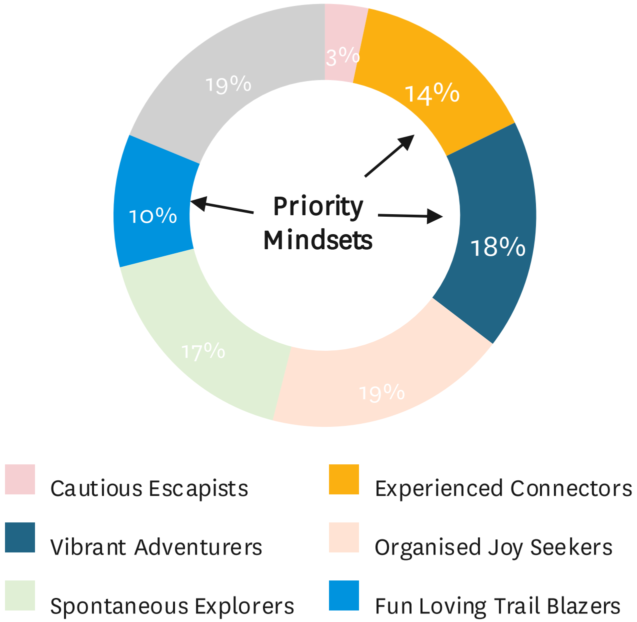
By gender



By region



Mindset Segments



Significantly higher / lower than non-ACs

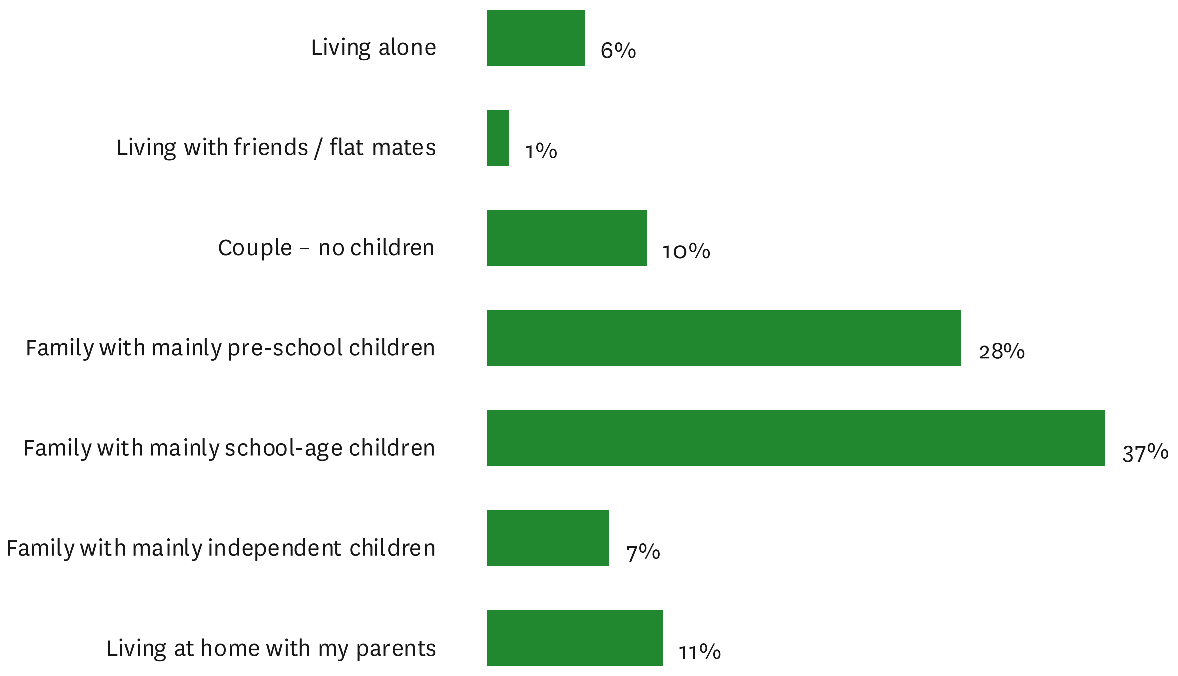
1. Sample size AC | Non-AC n = 859 | 1050

The profile of Chinese ACs is largely made up of younger family households

CHINA

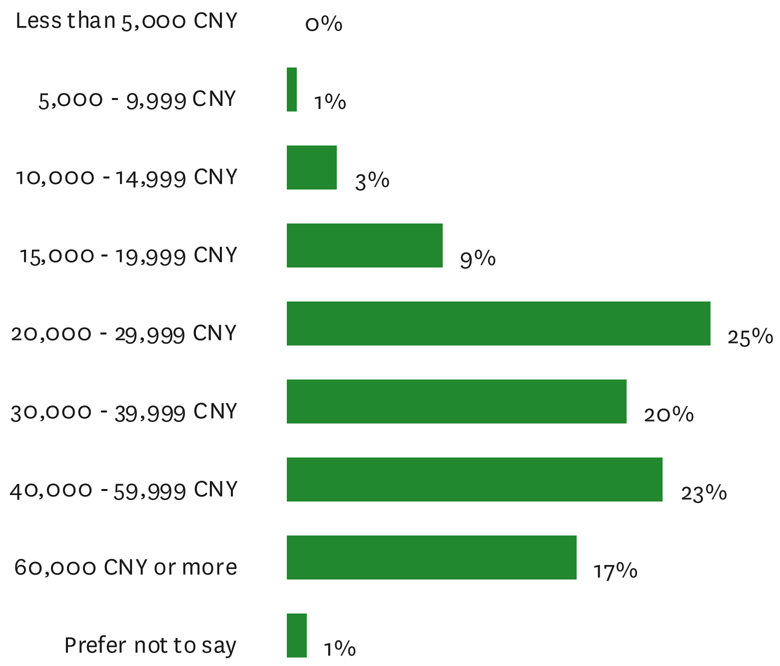
Household Composition

% Active Considerers | Current 5MRA



Household Income

% Active Considerers | Current 5MRA

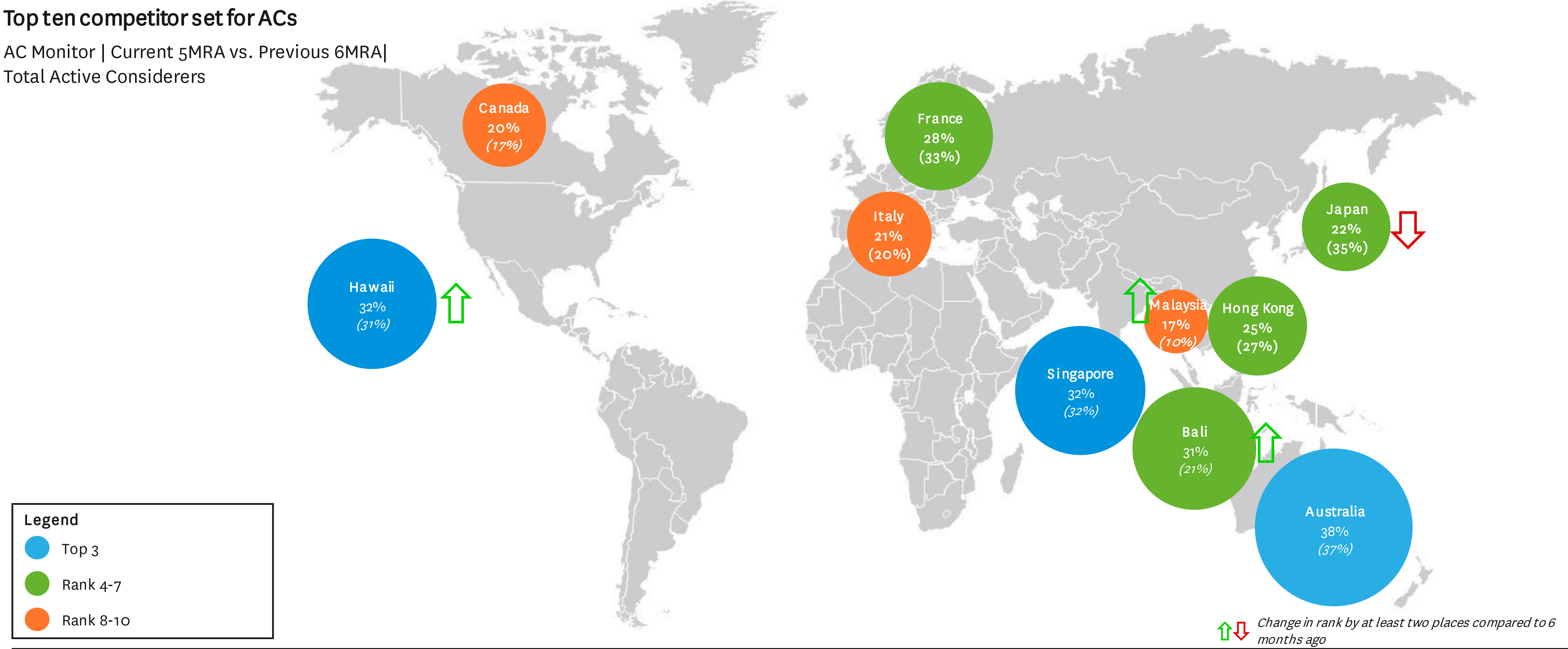


1. Sample size: n = 750
2. Q: "Which of these best describes your household?"
3. Q: "What is your total monthly household income?"

Based on preference, Australia remains New Zealand's top competitor, followed by Hawaii, Singapore and Bali which has grown in preference considerably, while Japan has declined

Top ten competitor set for ACs

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



1. Sample size: Current 5MRA n = 750; Previous 6 months n = 900, 749
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?"

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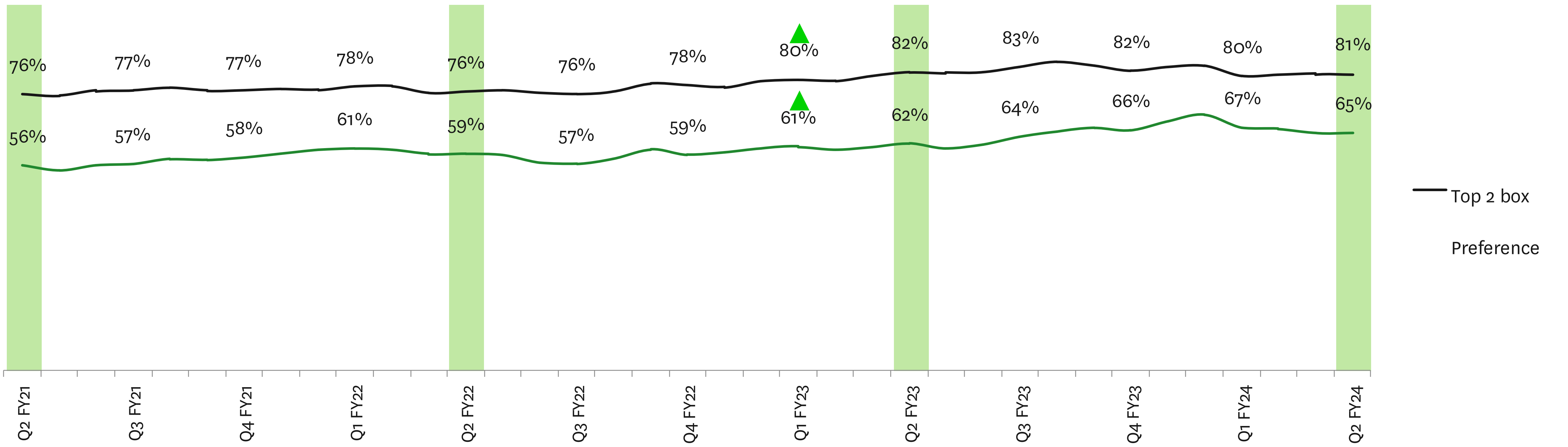
NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

Following a period of growth, preference for New Zealand has been stable over the last 12 months

New Zealand as a #1 Preferred Destination

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six months prior at 95%

1. Sample size: Q2 FY21 – Q2 FY24 (6MRA) n = 904, 902, 900, 901, 902, 1053, 1052, 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 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

There is an opportunity to build on New Zealand's core holiday proposition of amazing landscapes and being clean & unpolluted with other elements such as its friendly and welcoming people and variety of adventure activities which emerge as stronger drivers of preference in 2023

Top 15 drivers of preference for New Zealand

AC Monitor | % | 2023 (Jan-Dec 23) | Total Active Considerers

	2023 rank	2022 rank[1]	2021 rank[1]
Clean & unpolluted	1 ⇧	5 ⇧	11
Excitement	2	*	1
Affordable activities	3	6	6
Landscapes & scenery	4	1	2
Embrace all visitors	5 ⇧	18 ⇩	9
Escape the ordinary	6 ⇩	2	5
Affordable to fly to	7	4 ⇧	17
Range of adventure	8 ⇧	23	25
Friendly people	9 ⇧	21	14
Local culture	10	9	12
Range of experiences	11	12 ⇩	8
Invites exploration	12	*	*
Relax & refresh	13 ⇩	7 ⇧	15
Fun & enjoyment	14 ⇩	3	4
Amazing beaches	15	*	31

	2023 rank	2022 rank[1]	2021 rank[1]
Safe destination	16	16 ⇩	3
All seasons	17 ⇩	11 ⇧	24
Wildlife	18	20	*
Quality food & wine	19 ⇩	15	16
Indigenous culture	20 ⇧	25	*
Unique experiences	21 ⇩	10 ⇧	23
Family friendly	22 ⇩	13 ⇧	18
Easy to travel around	23	26	26
Iconic attractions	24	27	28
Interesting cities	25 ⇧	29	27
Relationship with the land	26 ⇧	30	29

Changes in brand attribution list affect comparability in ranking over time

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

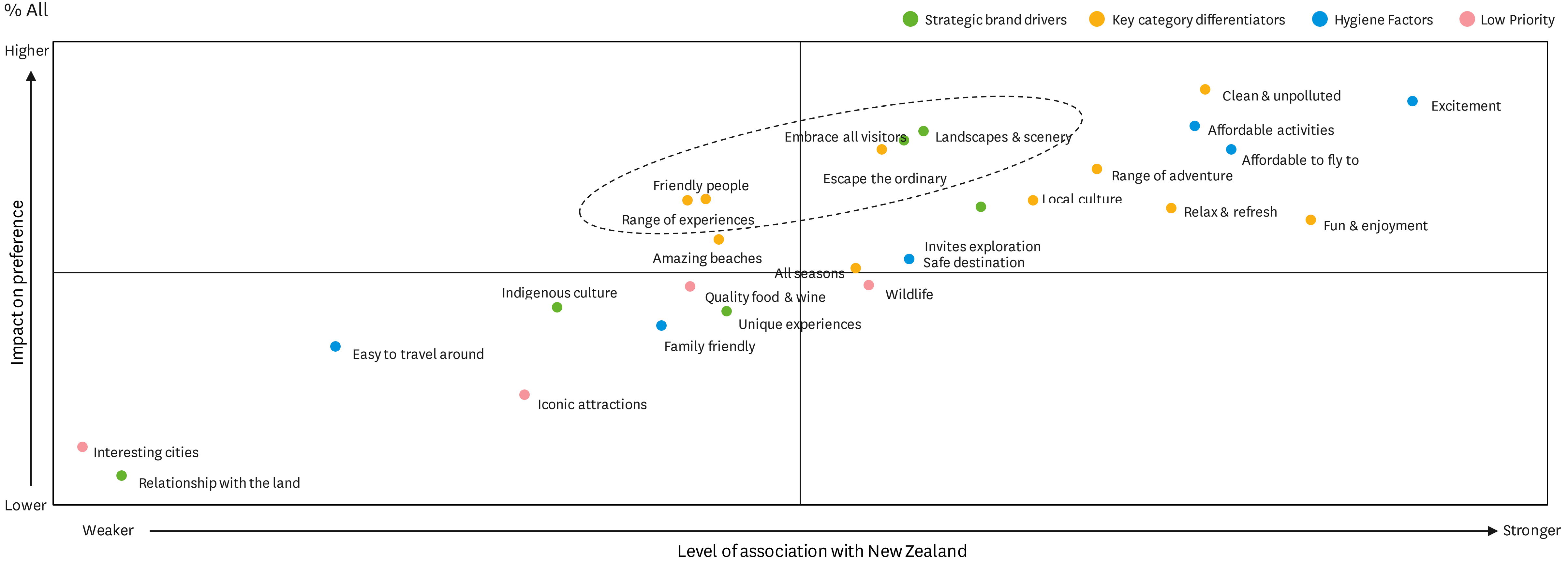
1. Some ranks may be missing if the statement has been removed for the current analysis period
* Not asked at that time

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

New Zealand as a destination performs strongly on the highest impact drivers, excitement, cleanliness and affordability, but there is an opportunity to boost perceptions of its stunning landscapes, welcoming and friendly people, range of experiences and sense of escapism

Brand Associations of New Zealand x Impact on preference

% All



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

100% PURE NEW ZEALAND

Relative to competitors, New Zealand performs well across the board, but focus is needed on building a greater competitive edge on high impact drivers, specifically landscapes and scenery, being a destination that embraces all visitors and invites exploration and friendly people

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	Australia	Singapore	Hawaii	Bali	France
Strategic Brand Drivers	Landscapes & scenery	97	108	99	108	96	94
	Embraces all visitors	99	109	100	88	100	97
	Invites exploration	100	107	78	114	98	98
	Indigenous culture	103	111	93	92	91	84
	Unique experiences	102	101	96	96	90	103
	Relationship with the land	99	92	104	114	99	92
Key Category Differentiators	Clean & unpolluted	104	102	82	99	100	88
	Escape the ordinary	104	93	83	111	97	94
	Range of adventure	103	108	90	92	97	89
	Friendly people	98	94	112	92	98	111
	Local culture	101	96	94	106	98	96
	Range of experiences	101	96	96	103	91	108
	Relax & refresh	103	93	89	96	110	95
	Fun & enjoyment	102	99	91	94	105	95
	Amazing beaches	95	110	95	111	112	82
	All seasons	100	92	101	94	108	106

Actions for TNZ:

Strengths:

- Cleanliness
- Escape the ordinary
- Indigenous culture
- Range of adventure
- Relax and refresh

Drivers to dial up:

- Landscapes and scenery
- Embraces all visitors
- Invites exploration
- Friendly people
- Amazing beaches

KANTAR

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

Relative weakness			100			*Relative strength*
Heat map shading is across rows, i.e. compares the six countries on that attribute						

NEW ZEALAND TOURISM

100% PURE NEW ZEALAND

Compared to other destinations, New Zealand is perceived to be a more exciting and safe destination to visit but less affordable which could hinder conversion

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	Australia	Singapore	Hawaii	Bali	France
Hygiene Factors	Excitement	104	85	91	105	104	95
	Affordable activities	96	95	98	102	110	112
	Affordable to fly to	93	99	104	108	102	121
	Safe destination	103	95	101	99	90	94
	Family friendly	100	96	102	100	101	95
	Easy to travel around	97	96	106	97	98	116
Low Priority	Wildlife experiences	103	124	75	86	105	76
	Quality food & wine	100	96	90	98	107	110
	Iconic attractions	98	101	96	101	96	116
	Interesting cities	94	100	111	94	94	128

Actions for TNZ:

Strengths:

- Excitement
- Destination safety

Drivers to dial up:

- Affordable activities
- Affordable to fly to

Tactical communications need to address key logistical knowledge gaps regarding safety, travel ease and time needed to explore New Zealand, and reassure ACs that they will feel welcomed here

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	33%	28%
2	How welcoming the locals are	28%	25%
3	What the weather is like	28%	29%
4	How safe it is from crime	28%	25%
5	How long it takes to travel between the main attractions	27%	21%
6	The length of time needed to experience New Zealand properly	26% ▲	16%
7	What / where the recommended things to see and do are	25%	21%
8	Whether New Zealand is a place that is accepting of people from diverse backgrounds and lifestyles	24%	*
9	The quality and variety of food and beverage options	23%	21%
10	Where I should get information about organising a holiday	23%	19%

Ranks higher now than six months ago

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

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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?"
* Not asked at that time

100% PURE NEW ZEALAND

Tactical messages should be surfaced earlier in the AC journey funnel as dreamers have several knowledge gaps

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	33%	*Sample size too low*	32%
2	How welcoming the locals are	29%		26%
3	What the weather is like	30%		25%
4	How safe it is from crime	29%		26%
5	How long it takes to travel between the main attractions	29%		23%
6	The length of time needed to experience New Zealand properly	23%		29%
7	What / where the recommended things to see and do are	27%		22%
8	Whether New Zealand is a place that is accepting of people from diverse backgrounds and lifestyles	22%		28%
9	The quality and variety of food and beverage options	24%		21%
10	Where I should get information about organising a holiday	26%		19%

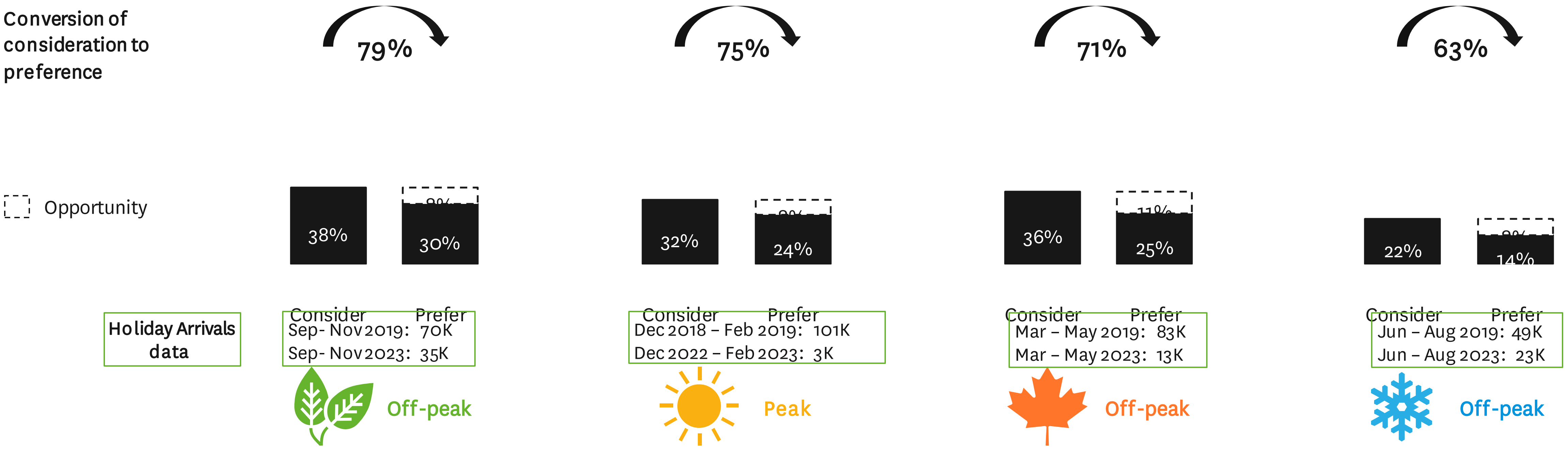
Significantly higher / lower than comparison group at 95%

1. Sample size Dreaming n = 269, Planning n = 19, Booking n = 162
2. Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Spring is the most considered and preferred season to visit New Zealand, followed by summer and autumn, presenting a strong opportunity for seasonal dispersal

Seasons – consideration & preference

AC Monitor | Current 5MRA | Total Active Considerers



KANTAR

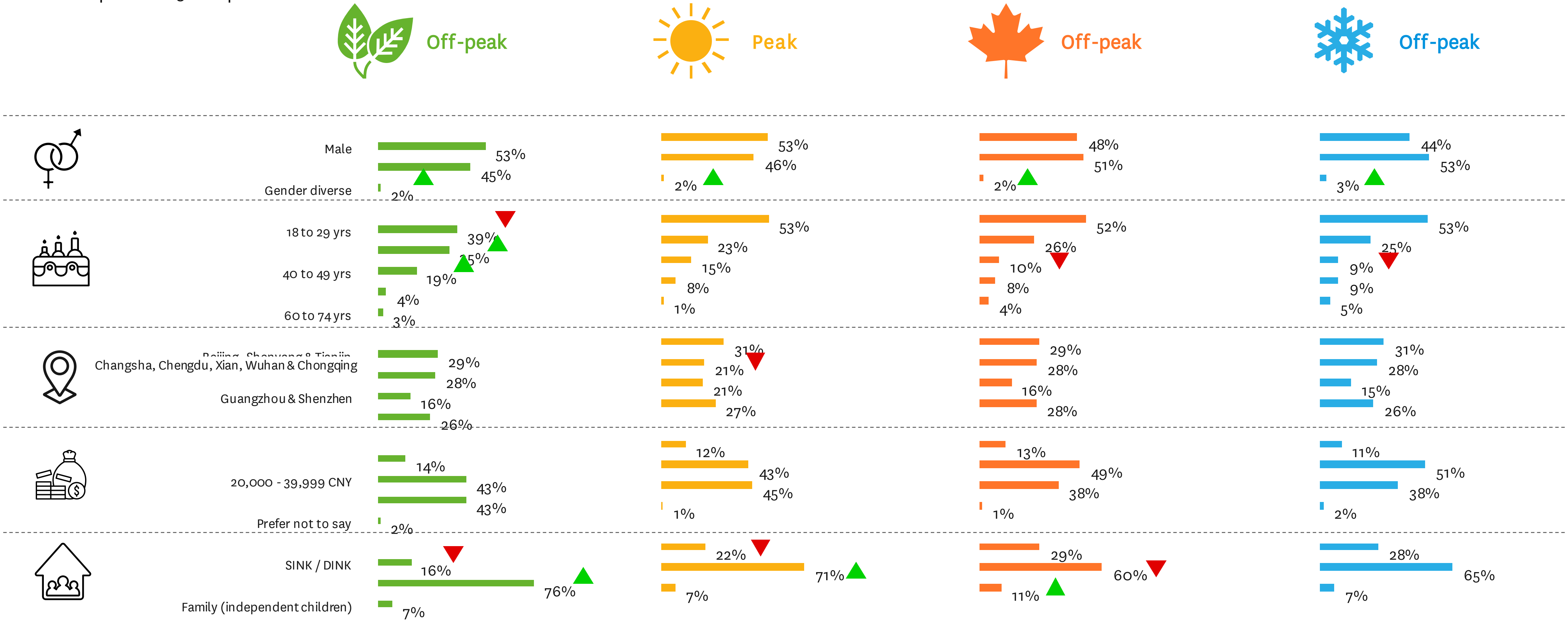
1. Sample size n = 750
2. Question: "At what time(s) of year would you consider visiting New Zealand?" When would you prefer to visit New Zealand?"
3. Spring 'Off-peak' refers to the period Sep, Oct, Nov; 'Peak' refers to the period Dec, Jan, Feb; Autumn 'Off-peak' refers to the period Mar, Apr, May;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

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

The demographic profiles are broadly similar across considerers of each season although spring considerers skew towards those aged 40 – 49 years and families with dependents

Profile of Seasonal Considerers

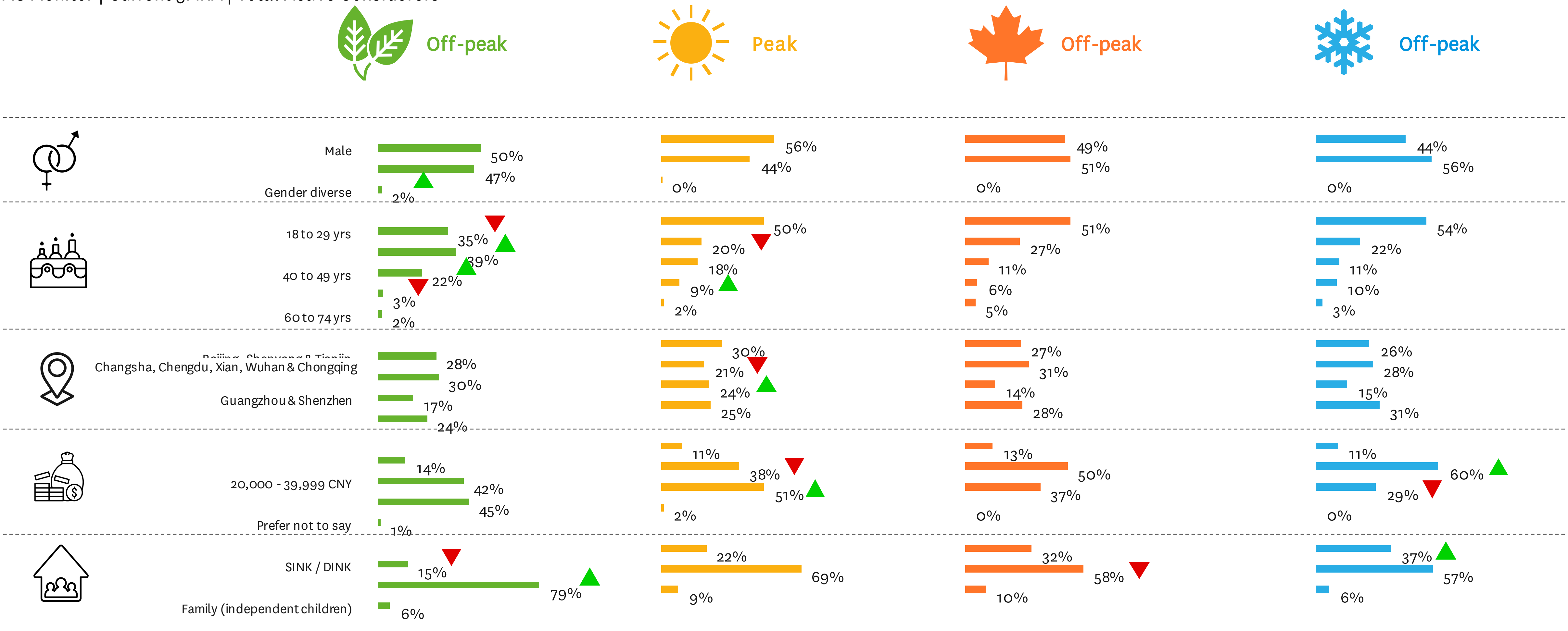
AC Monitor | Current 5MRA | Total Active Considerers



The profile of winter preferers skews towards lower household incomes while spring preferers skew more towards those aged 30 – 49 yrs and families with dependent children

Profile of Seasonal Preferers

AC Monitor | Current 5MRA | Total Active Considerers



1. Sample sizes: Spring n = 227 | Summer n = 191 | Autumn n = 184 | Winter n = 102

Significantly higher / lower than non-preferers of that season

JAPAN


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

Active Considerer journey funnel – Japan

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 (Y100,000 per person on a holiday to New Zealand).

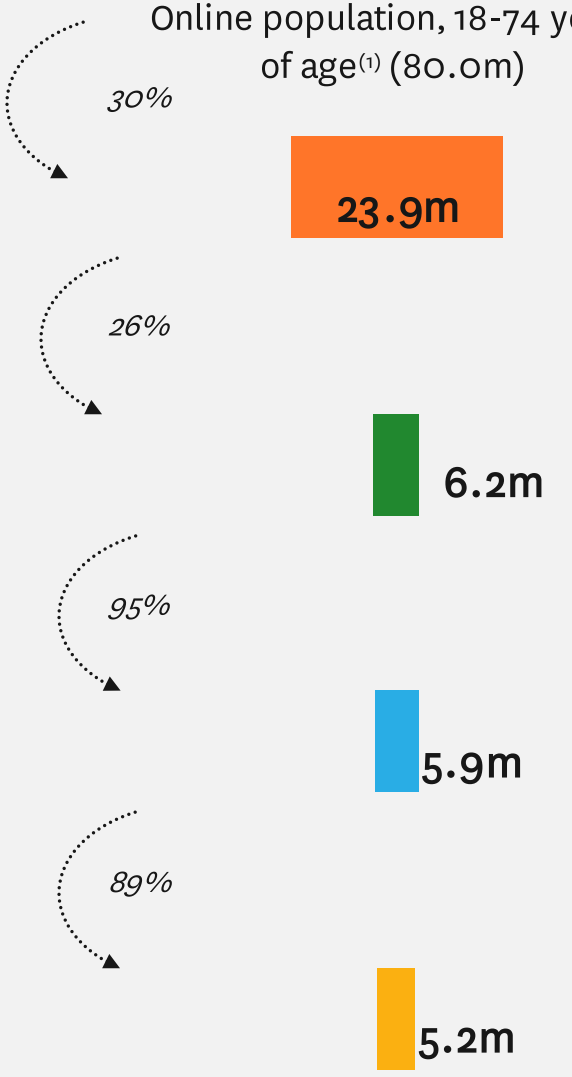
Online population, 18-74 years of age(1) (80.0m)

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 Y100,000 per person on a holiday to New Zealand(2)

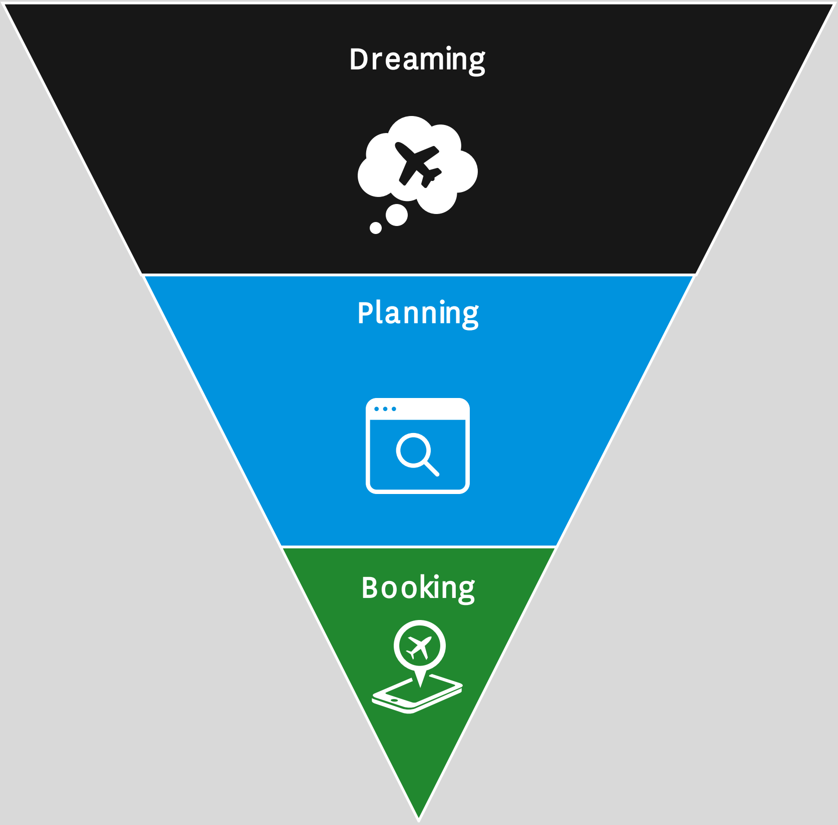


KANTAR

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 - Japan



Book to come to NZ
Moment of Truth

Size (%)

Active Considerers (5.2m)	ACs	Priority Mindset Group
2.3m	44%	28% ▼
1.2m	23%	29% ▲
1.7m	33%	42%

Comments

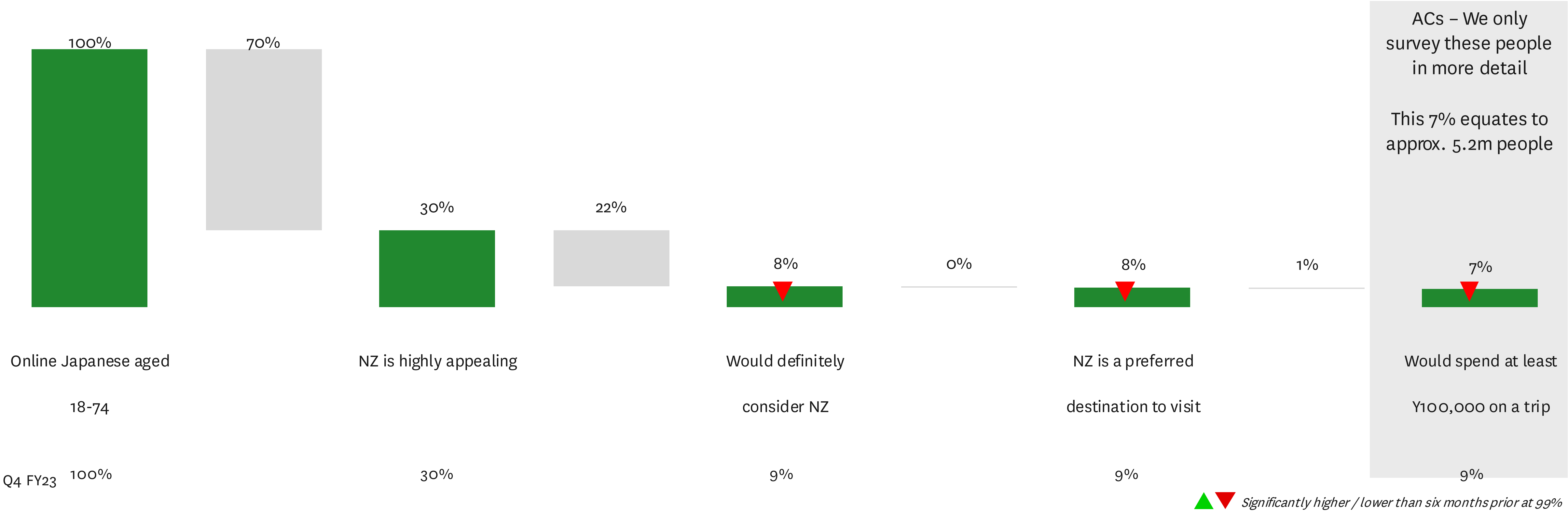
- ‘Ready to book’ is a claimed state of mind
- It doesn’t mean ACs will book a flight tomorrow if possible to do so, but that the commitment to visit New Zealand is there, and they feel confident enough to consider it a place they’d book travel to
- A number of extrinsic (e.g. price, availability) and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

The AC incidence in Japan has slipped in the last 6 months, yet Japan remains a sizable opportunity for TNZ with 5.2 million potential ACs

Qualifying criteria for defining ACs

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



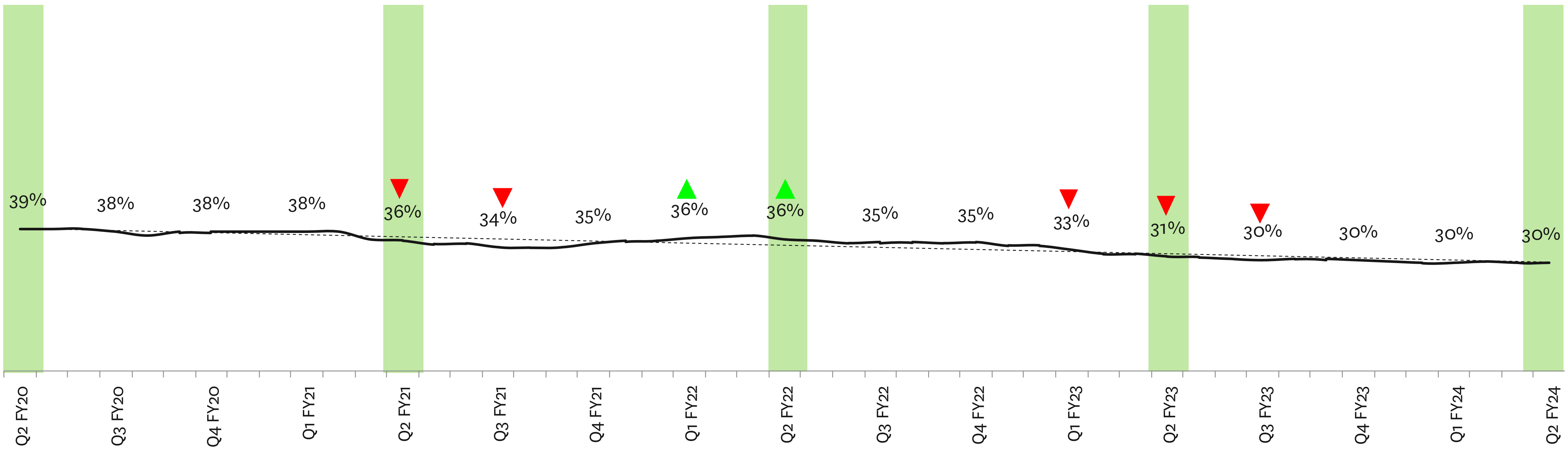
1. The approx. AC pool size is based on the online population estimates as of December 2023 and the AC incidence rate for the current five months
2. Sample size n = 17850 | Q4 FY23 n = 16726

The appeal of New Zealand holidays has been stable over the last 12 months and remains significantly lower than the pre-pandemic levels

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

Appeal

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



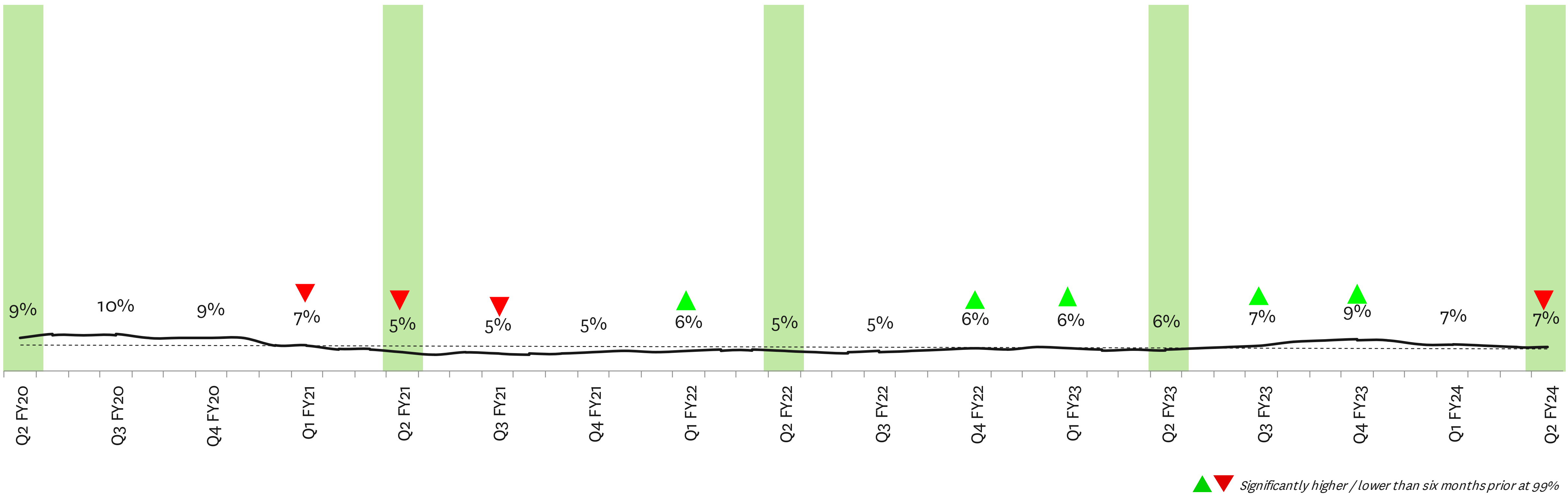
Significantly higher / lower than six months prior at 99%

1. Sample size: Q2 FY20 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 11109, 10671, 11887, 15267, 21088, 25834, 24125, 20636, 21659, 20878, 17468, 19183, 20353, 17270, 16726, 20374, 17850
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

The AC incidence has declined in the latest quarter

Incidence of ACs

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



KANTAR

1. Sample size: Q2 FY21 – Q1 FY24 (6MRA), Q2 FY24 (5MRA) n = 19929, 24141, 23591, 20636, 21659, 20878, 17468, 19183, 20353, 17270, 16726, 20374, 17850
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 Y100,000 while holidaying in New Zealand

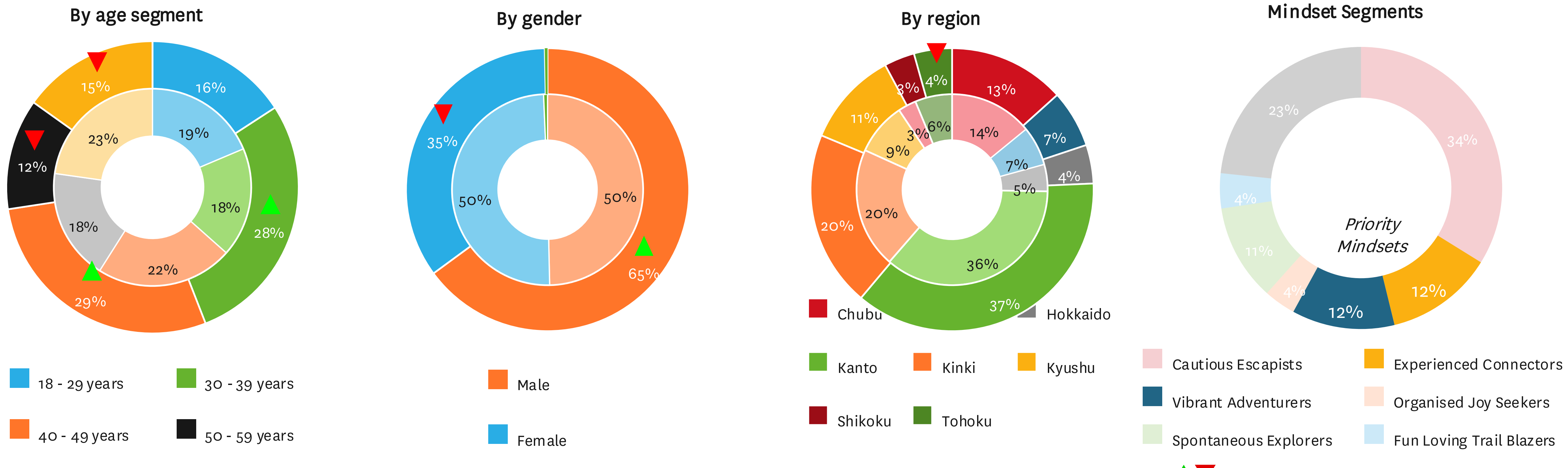
NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

Compared to non-ACs, ACs are more likely to be aged 30-49 years and male; priority mindsets make up 24% of ACs

Profile of Active Considerer

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

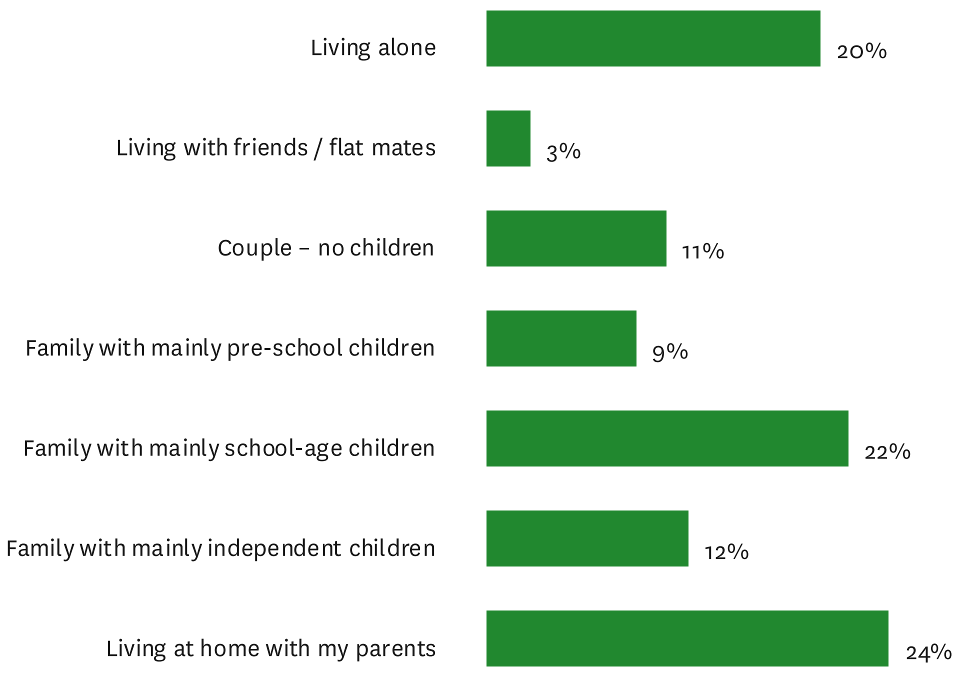
Outer ring: Japan Active Considerers
Inner ring : Japan non-Active Considerers



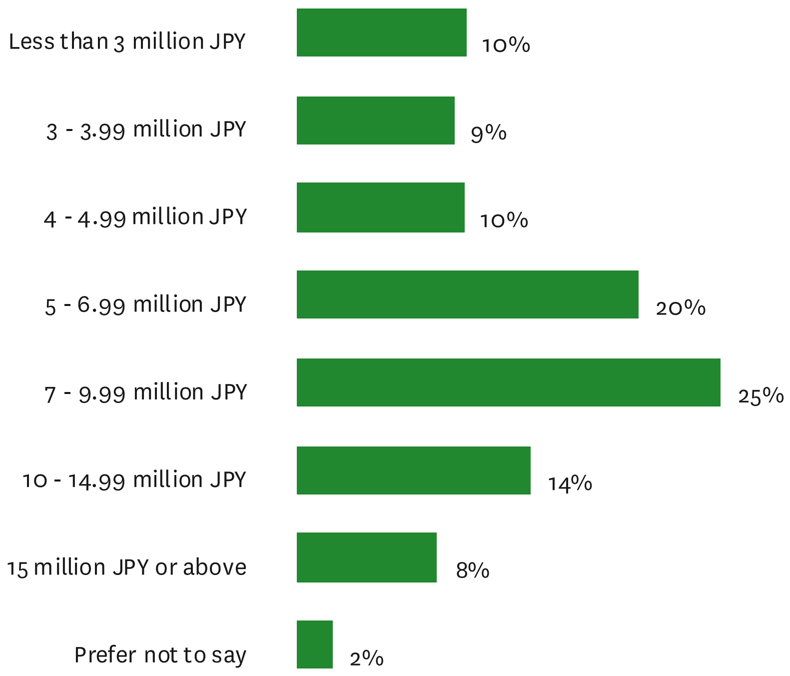
Significantly higher / lower than non-ACs

Those with a household income of 5 – 10 million JPY make up almost half of the AC pool

Household Composition
% Active Considerers | Current 5MRA



Household Income
% Active Considerers | Current 5MRA

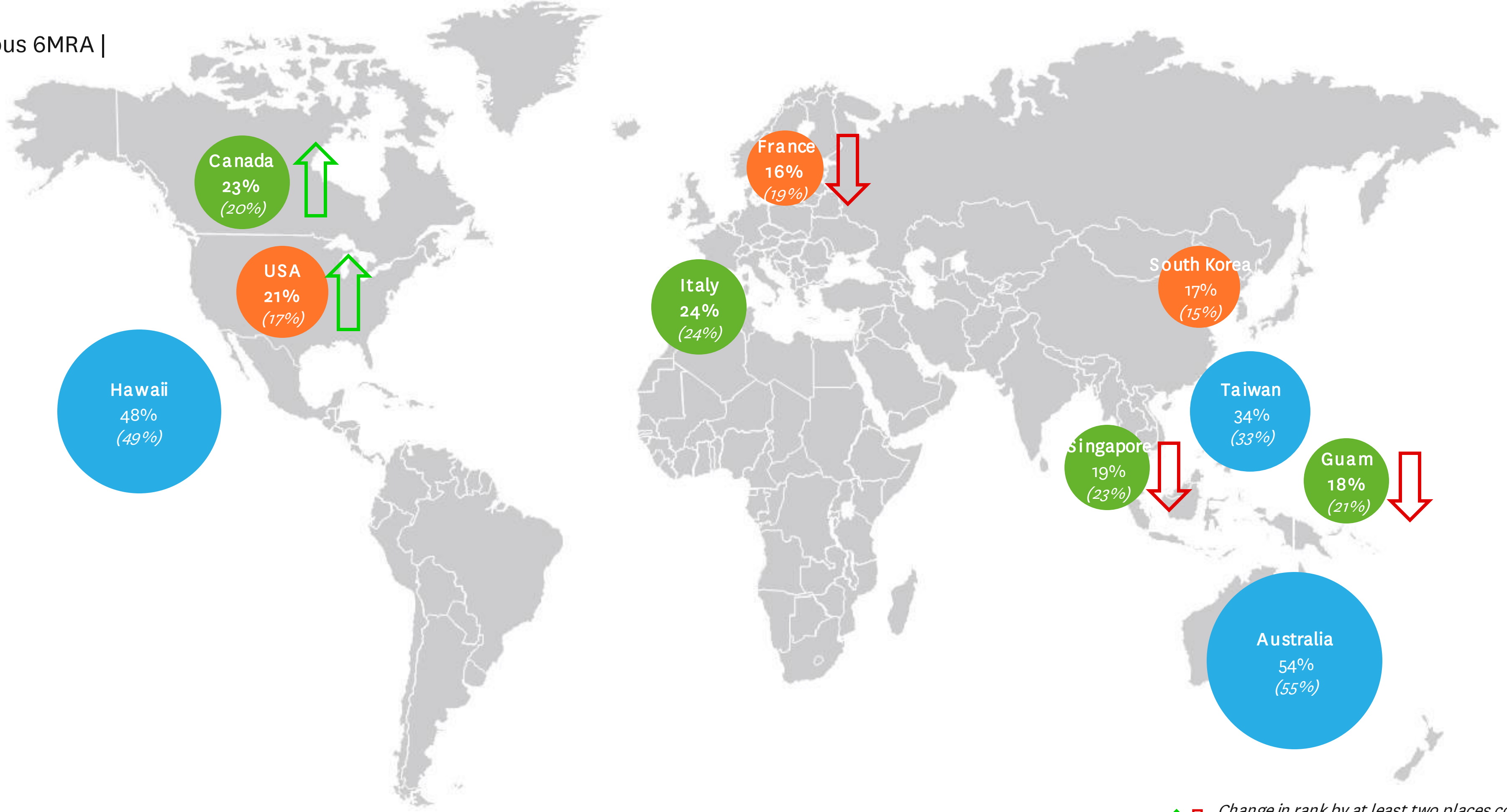


1. Sample size: n = 750
2. Q: "Which of these best describes your household?"
3. Q: "What is your total annual household income?"

Based on preference, Australia and Hawaii are key competitors to watch among Japanese ACs

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

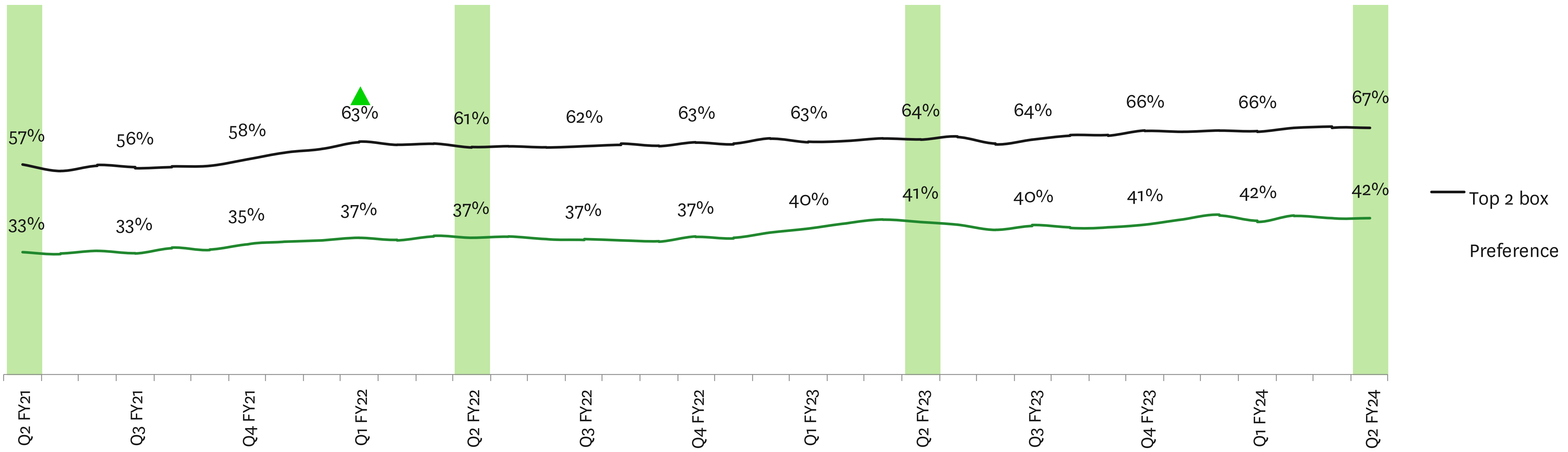
Change in rank by at least two places compared to 6 months ago

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?"

Preference for New Zealand has steadily grown over the last two to three years, with first-choice preference now at a peak of 42%

New Zealand as a #1 Preferred Destination

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six month prior at 95%

KANTAR

1. Sample size: Q2 FY21 – Q2 FY24 (6MRA) n = 902, 1053, 1052, 900, 900, 900, 900, 900, 900,900, 901,901,900,900
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

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 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

The focus should be on promoting New Zealand as a fun, exciting destination that invites exploration through its stunning landscapes, amazing wildlife, pristine environment, local culture and its diverse and novel range of adventure and experiences; the need for safety and feeling embraced is reducing

Top 15 drivers of preference for New Zealand

AC Monitor | % | 2023 (Jan-Dec 23) | Total Active Considerers

Latest results	2023 rank	2022 rank(1)	2021 rank(1)
Excitement	1	*	1
Landscapes & scenery	2	1	2
Wildlife	3	5	*
Fun & enjoyment	4	4	5
Clean & unpolluted	5	8	7
Invites exploration	6	*	*
Range of adventure	7 ⇧	12 ⇩	4
Relax & refresh	8 ⇩	2 ⇧	9
Unique experiences	9 ⇧	14 ⇩	10
Local culture	10 ⇧	16	15
Safe destination	11 ⇩	3	3
Range of experiences	12 ⇧	20	17
Iconic attractions	13 ⇧	25 ⇩	21
Family friendly	14 ⇧	18	16
Embrace all visitors	15 ⇩	7	8

Latest results	2023 rank	2022 rank(1)	2021 rank(1)
Indigenous culture	16	13	*
Friendly people	17 ⇩	10	11
Escape the ordinary	18 ⇩	6	6 ⇧
Interesting cities	19	22	25
Quality food & wine	20	21	23
Amazing beaches	21	*	27 ⇩
All seasons	22	24 ⇩	20
Easy to travel around	23 ⇧	28	28
Relationship with the land	24	27	26
Affordable activities	25 ⇧	30	29
Affordable to fly to	26 ⇧	31	32

Changes in brand attribution list affect comparability in ranking over time

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

1. Some ranks may be missing if the statement has been removed for the current analysis period
* Not asked at that time

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

New Zealand as a destination performs strongly on the high impact drivers, most notably landscapes and scenery and wildlife, but there is an opportunity to boost perceptions of family friendliness

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

Relative to competitors, New Zealand performs strongly on cleanliness as well as its strategic drivers – the exception to this is a place which embraces visitors as well as fun and enjoyment

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	Australia	Hawaii	Taiwan	Italy	Canada
Strategic Brand Drivers	Landscapes & scenery	106	111	88	50	68	132
	Invites exploration	114	112	74	59	72	99
	Unique experiences	105	104	85	76	105	105
	Embrace all visitors	87	92	116	108	140	115
	Indigenous culture	112	124	87	68	52	45
	Relationship with the land	105	93	88	103	107	95
Key Category Differentiators	Fun & enjoyment	94	99	98	117	109	102
	Clean & unpolluted	125	105	65	35	60	110
	Range of adventure	107	110	98	50	56	106
	Relax & refresh	103	94	105	73	82	115
	Local culture	104	102	76	108	123	91
	Range of experiences	99	112	79	72	133	122
	Friendly people	97	93	94	157	73	89
	Escape the ordinary	97	95	108	81	124	108
	Amazing beaches	95	121	140	30	70	57
	All seasons	93	86	126	124	106	65

Actions for TNZ:

Strengths:

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

Drivers to dial up:

- Embrace all visitors
- Fun & enjoyment
- All seasons

Relative weakness | 100 | *Relative strength*

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

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

New Zealand stands out from several competitors for its wildlife experiences, but performs less competitively on hygiene factors, most notably excitement, family friendliness and ease of travelling around

Relative brand positioning for Hygiene Factors and Low Priority

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

	Brand associations	New Zealand	Australia	Hawaii	Taiwan	Italy	Canada
Hygiene Factors	Excitement	95	98	90	122	126	107
	Safe destination	100	95	94	128	66	115
	Family friendly	89	95	116	130	99	96
	Easy to travel around	92	69	121	149	120	95
	Affordable activities	100	72	78	232	80	84
	Affordable to fly to	83	62	90	347	59	68
Low Priority	Wildlife experiences	112	118	82	29	49	132
	Iconic attractions	93	102	102	101	120	103
	Interesting cities	89	99	82	135	176	110
	Quality food & wine	102	110	69	49	212	98

Actions for TNZ:

Strengths:

- Wildlife experience

Drivers to dial up:

- Excitement
- Family friendliness
- Easy to travel around

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

Tactical communications need to continue to fill in key knowledge gaps around weather conditions, the ease of travelling around and the length of time required to fly to New Zealand

Top ten knowledge gaps

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

	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	What the weather is like	36% ▲	29%
2	How easy it is to travel around	33%	29%
3	The length of time required to fly to New Zealand	31%	27%
4	How safe it is from crime	27%	24%
5	How welcoming the locals are	26%	22%
6	What / where the recommended things to see and do are	26%	26%
7	The quality and variety of food and beverage options	25%	21%
8	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	24%	24%
9	How long it takes to travel between the main attractions	23%	26%
10	The length of time needed to experience New Zealand properly	20%	19%

Ranks higher now than six months ago

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

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

Tactical communications should be surfaced as early as the dreaming phase when key knowledge gaps start to emerge; however, messages about the length of time required to fly to New Zealand will be most effective among planners

Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5MRA | Total Active Considerers

	What do ACs want to know more about before choosing New Zealand?	Dreaming	Planning	Booking
1	What the weather is like	35%	38%	36%
2	How easy it is to travel around	37%	34%	27%
3	The length of time required to fly to New Zealand	26%	41% ▲	31%
4	How safe it is from crime	33%	29%	19%
5	How welcoming the locals are	24%	32%	25%
6	What / where the recommended things to see and do are	25%	30%	25%
7	The quality and variety of food and beverage options	26%	23%	24%
8	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	23%	26%	24%
9	How long it takes to travel between the main attractions	24%	24%	22%
10	The length of time needed to experience New Zealand properly	19%	17%	24%

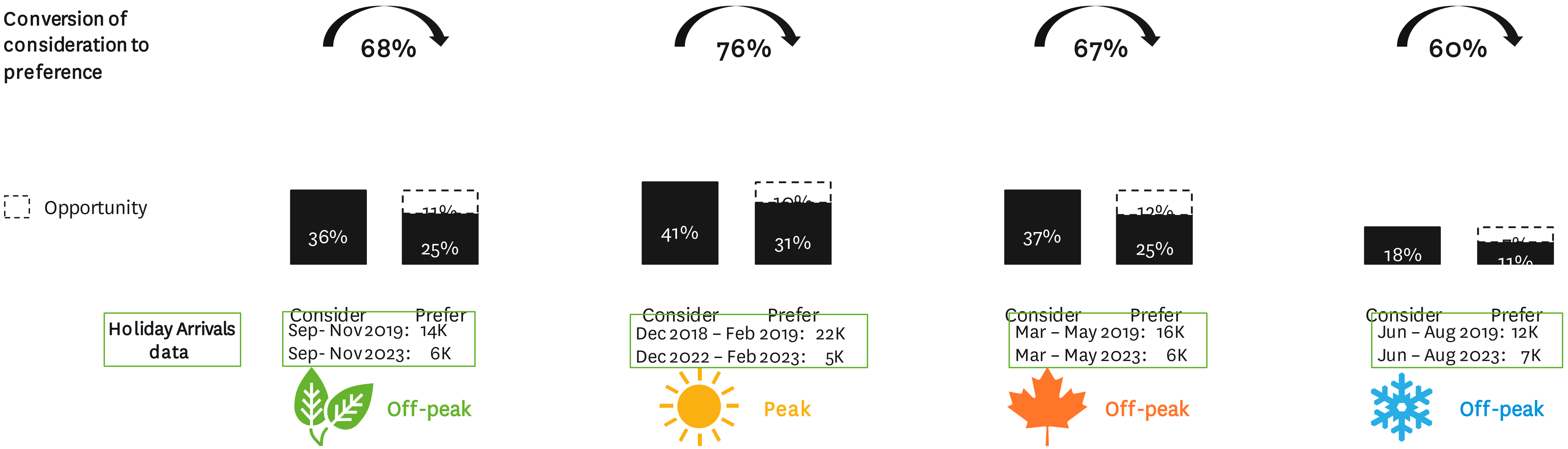
▲▼ *Significantly higher / lower than comparison group at 95%*

1. Sample size: Dreaming n = 204, Planning n = 101, Booking n = 145
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, preference is also relatively high for both spring and autumn presenting opportunities for seasonal dispersal

Seasons – consideration & preference

AC Monitor | Current 5MRA | Total Active Considerers



KANTAR

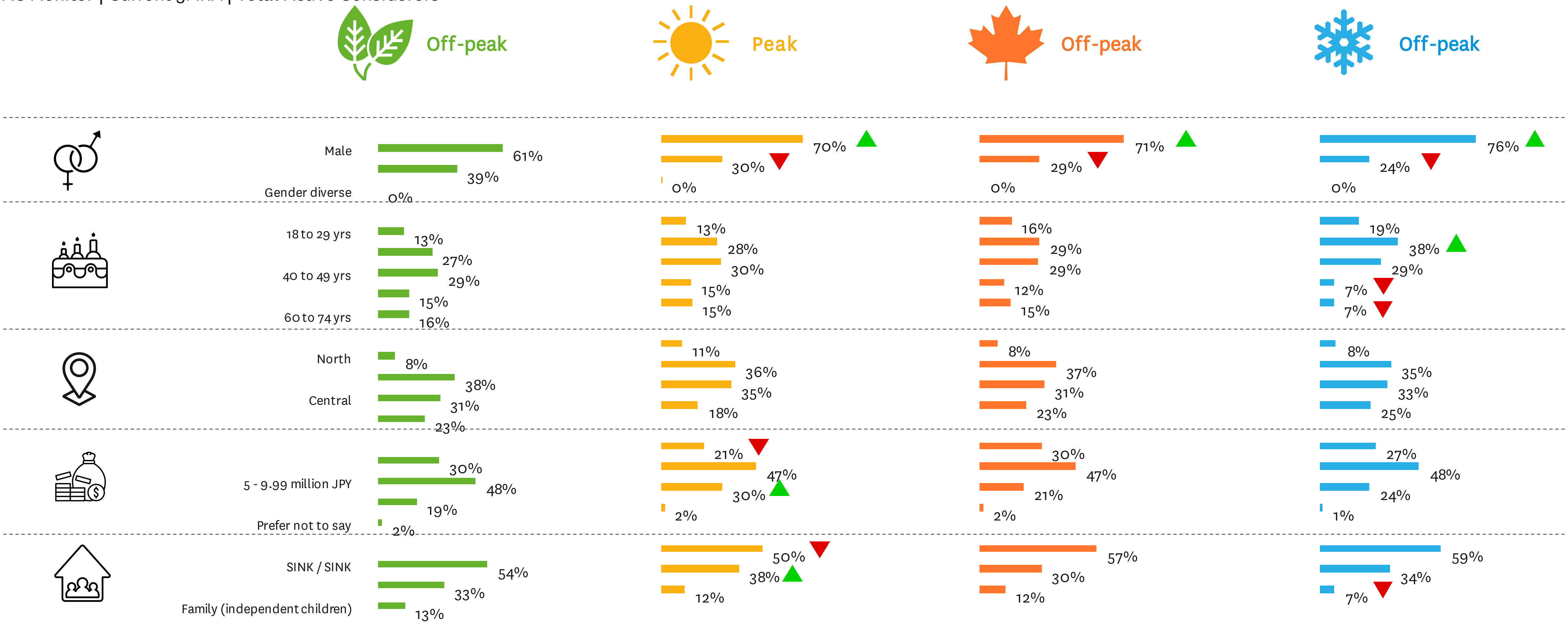
1. Sample size: Q2 FY24 (5MRA) n = 750
2. Question: "At what time(s) of year would you consider visiting New Zealand?" When would you prefer to visit New Zealand?"
3. Spring 'Off-peak' refers to the period Sep, Oct, Nov; 'Peak' refers to the period Dec, Jan, Feb; Autumn 'Off-peak' refers to the period 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

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

The demographic profiles of off-peak considerers skew towards lower income households while winter considerers also have a strong skew towards males and those aged 30 – 39 years

Profile of Seasonal Considerers

AC Monitor | Current 5MRA | Total Active Considerers



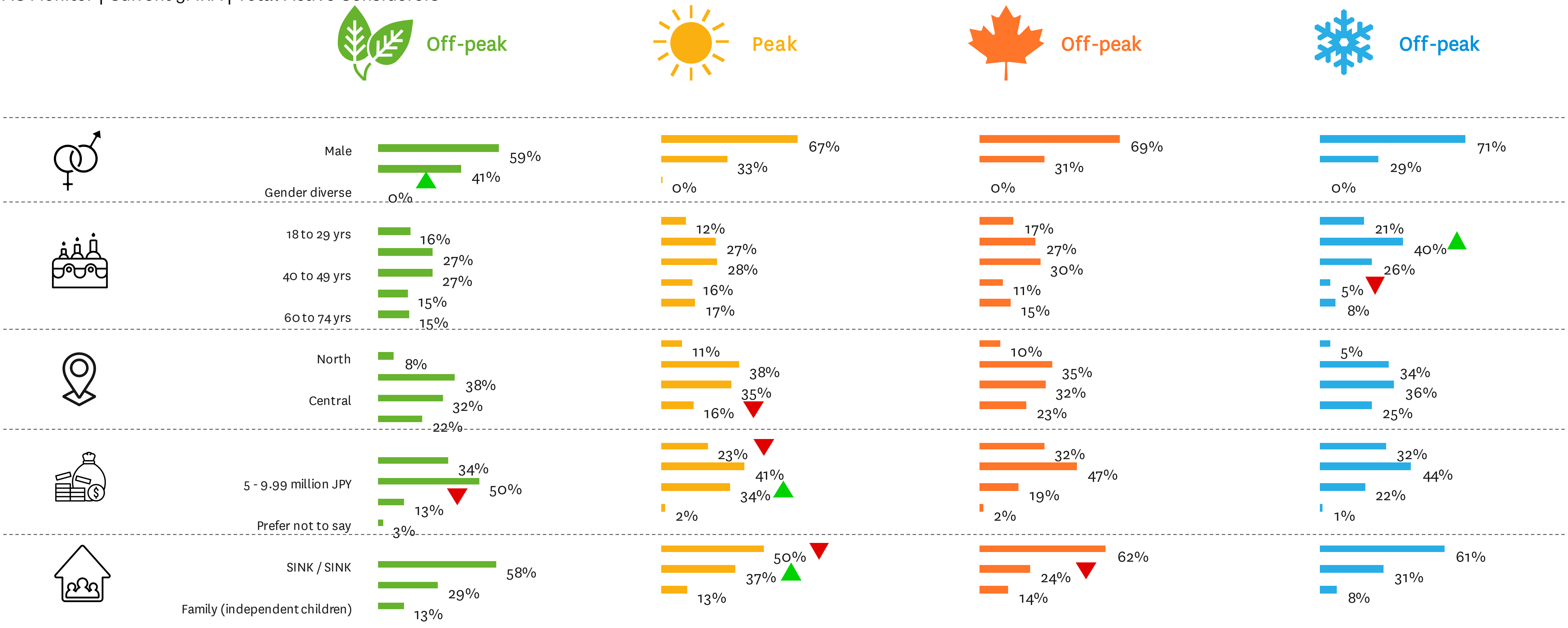
1. Sample sizes: Spring n = 284 | Summer n = 290 | Autumn n = 265 | Winter n = 119

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

The demographic profiles of off-peak preferers are similar to those of considerers – they skew towards lower income households while winter preferers also skew towards 30 – 39 yrs group

Profile of Seasonal Preferers

AC Monitor | Current 5MRA | Total Active Considerers



1. Sample sizes: Spring n = 201 | Summer n = 227 | Autumn n = 179 | Winter n = 72

Significantly higher / lower than non-preferers of that season

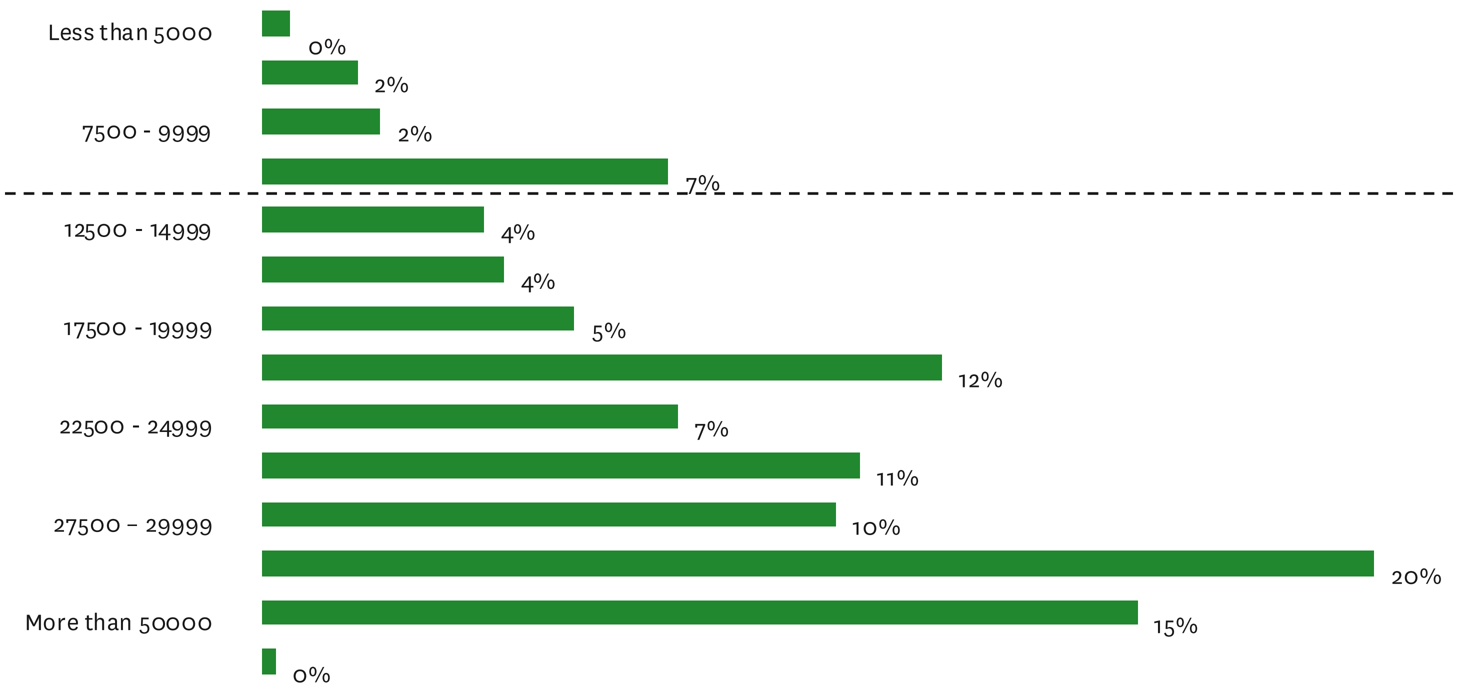
Appendix

Amongst Chinese population who agree that New Zealand is a preferred holiday destination, 18% do not meet the current spend threshold criteria of 12,500 yuan

CHINA

Spend on holiday in New Zealand

% Online users aged 18-74 | Current 5MRA



KANTAR

Sample sizes: n = 1211

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

Compared to those who do not find New Zealand appealing, those who do are more likely to be aged 18-29 years and live in Changsha, Chengdu, Xian, Wuhan or Chongqing

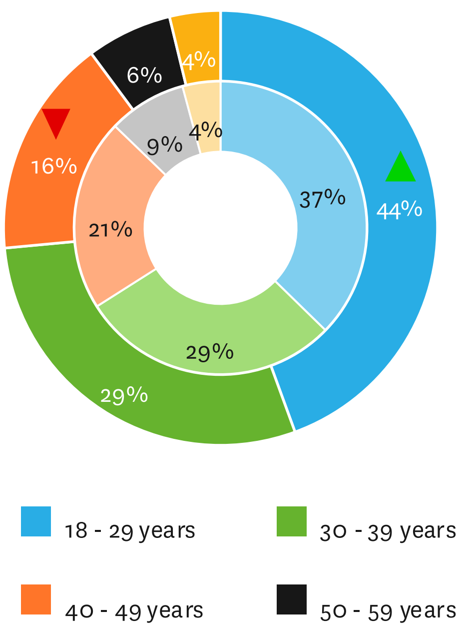
CHINA

Profile of those who find New Zealand appealing

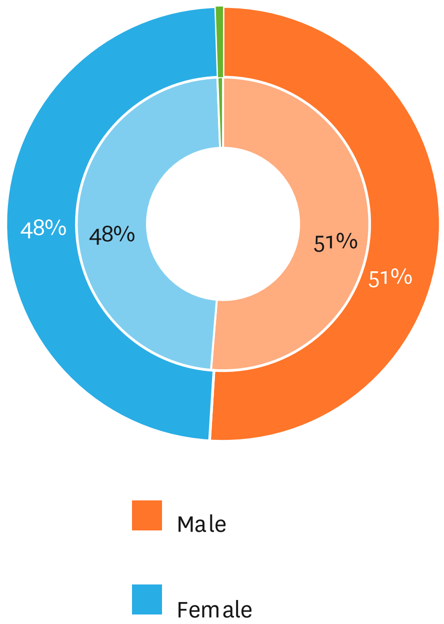
AC Monitor | Current 5MRA | Those who find New Zealand appealing vs. not

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

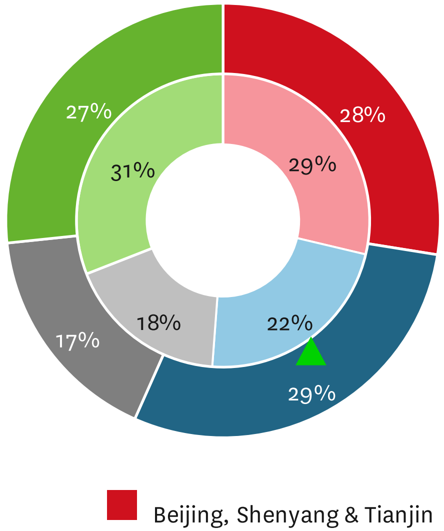
By age segment



By gender



By region



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

1. Sample sizes: Those who find New Zealand appealing n = 1554 | Those who do not find New Zealand appealing n = 355

The profile of those who would seriously consider visiting New Zealand are more likely to be aged 18 -29 years

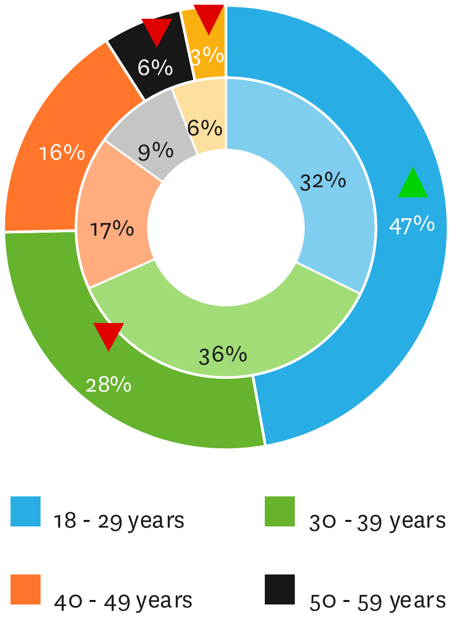
CHINA

Profile of those who would seriously consider visiting New Zealand

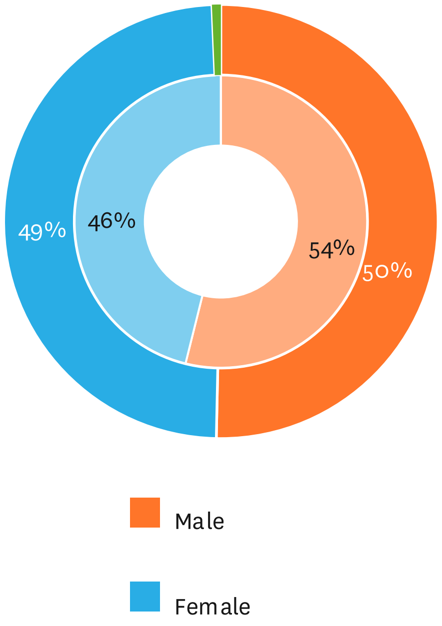
AC Monitor | Current 5MRA | Those who would seriously consider vs. not

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

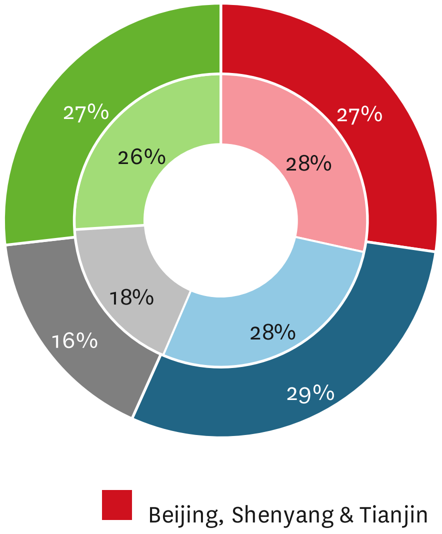
By age segment



By gender



By region



Significantly higher / lower than those who would not seriously consider

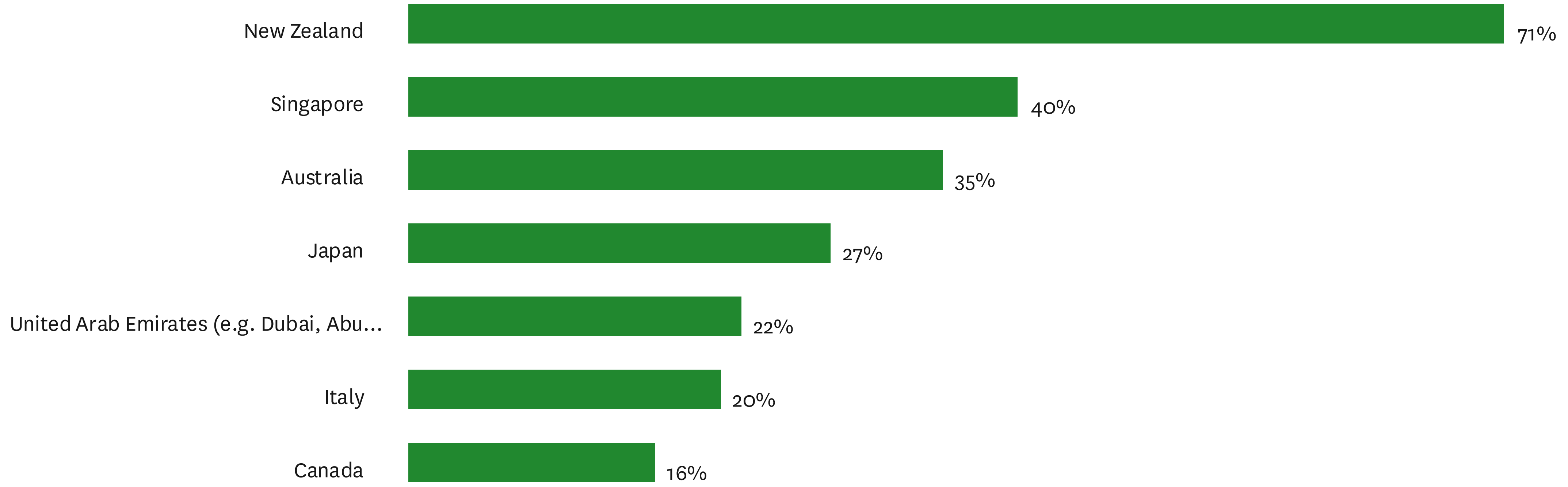
1. Sample sizes: Those who would seriously consider visiting New Zealand n = 1241 | Those who would not seriously consider visit ing New Zealand n = 313

In terms of recall of destination advertising or promotion, New Zealand generates the greatest levels, by far, followed by Singapore and Australia

CHINA

Holiday destinations seen advertised or promoted recently (Prompted Awareness)

AC Monitor | Current 5MRA | Total Active Considerers



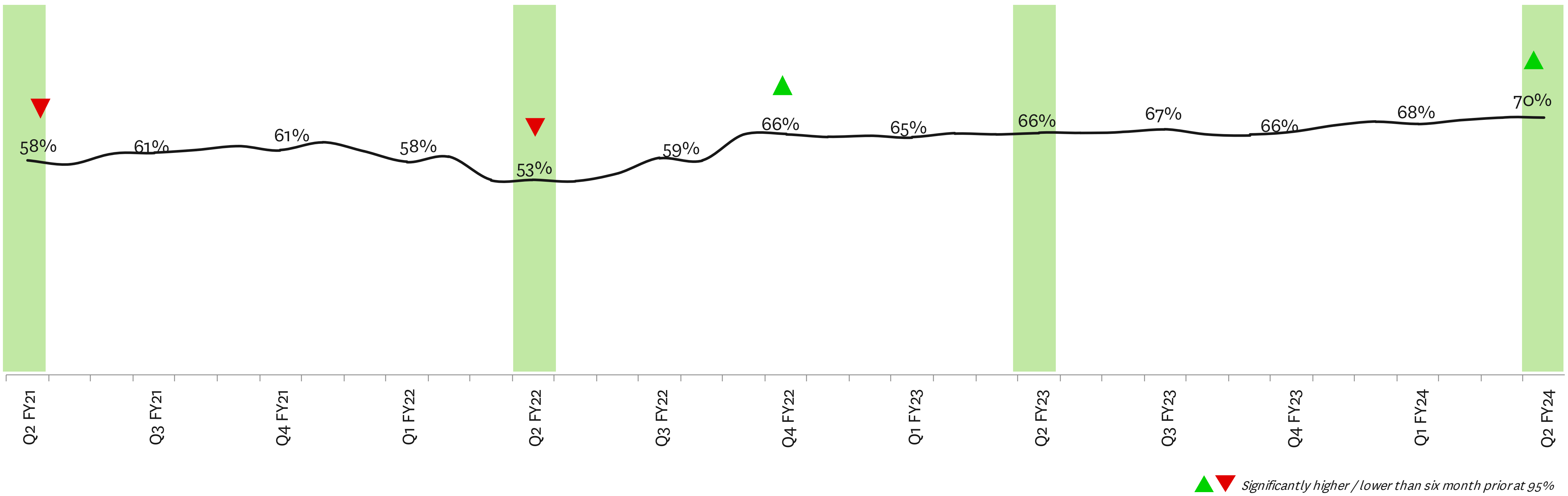
1. Sample sizes: n = 750
2. Question "Which of these holiday destinations have you seen advertised or promoted recently?"

Advertising awareness for New Zealand has recently increased to 70%, the highest levels seen

CHINA

Seen New Zealand advertised or promoted recently (Prompted Awareness)

AC Monitor | 6MRA | Total Active Considerers



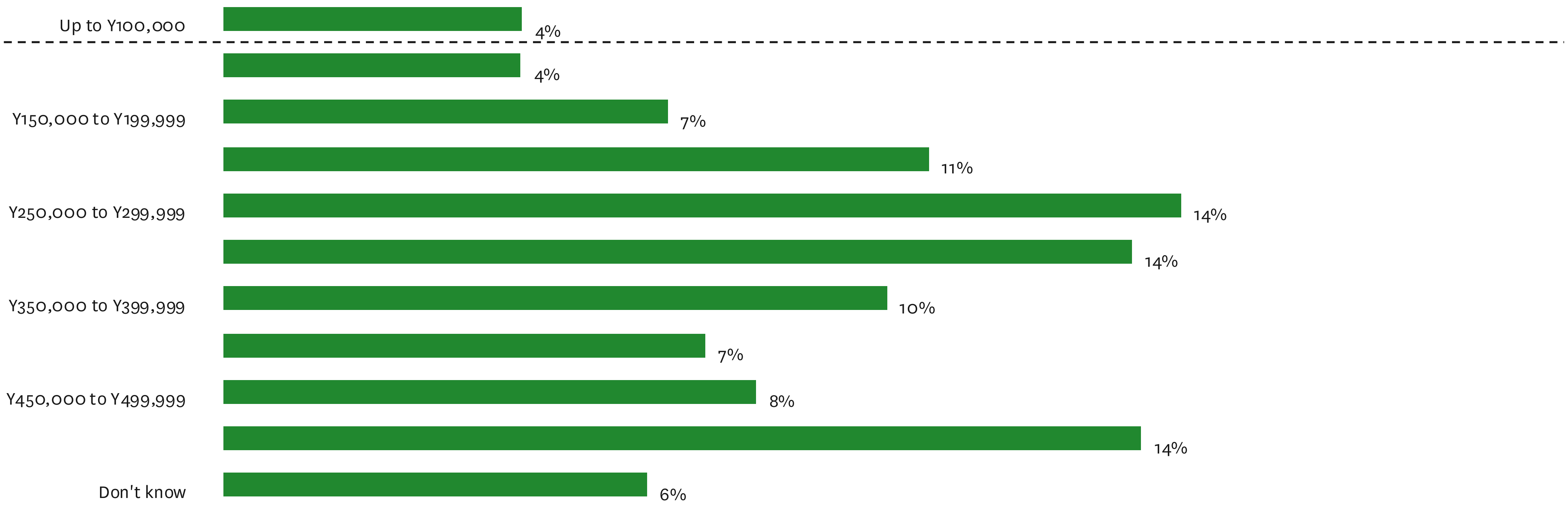
1. Sample size: Q3 FY21– Q2 FY24 (6MRA) n = 603, 1166, 1164, 900, 901, 901, 901, 902, 902, 901, 900, 900, 900
2. Q "Which of these holiday destinations have you seen advertised or promoted recently?"

Of Japanese population who agree that New Zealand is a preferred holiday destination, 4% do not meet the current spend threshold criteria of Y100,000

JAPAN

Spend on holiday in New Zealand

% Online users aged 18-74 | Current 5MRA



Sample sizes: n = 1044
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"

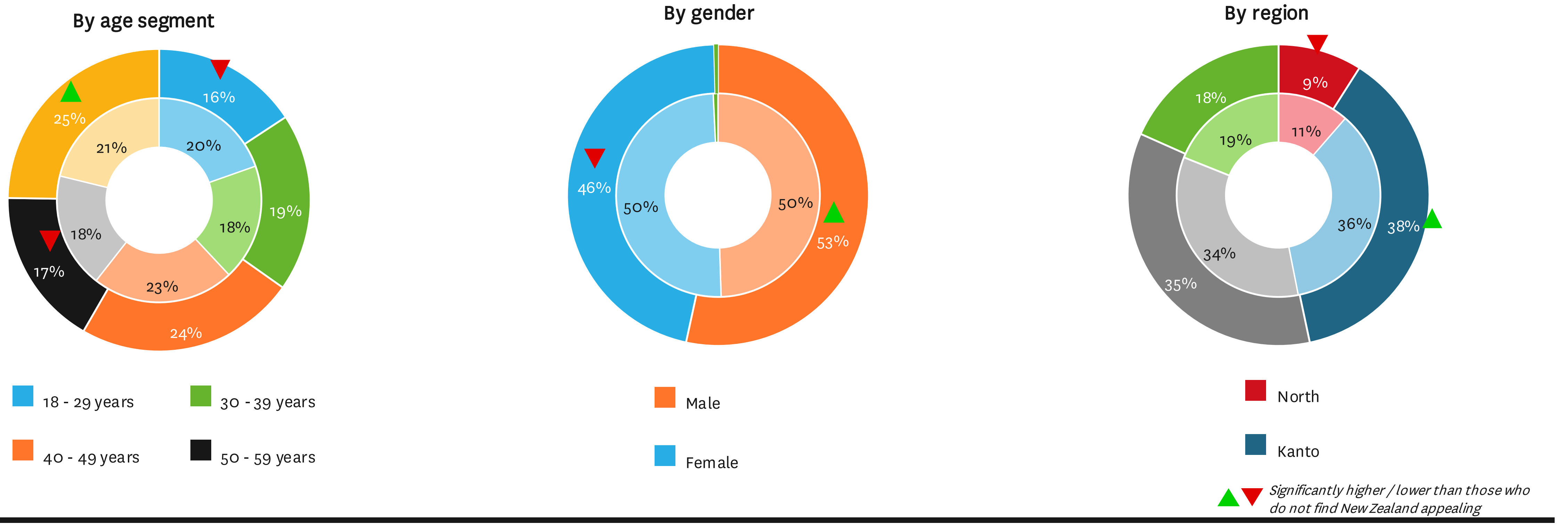
Older travellers aged 60-74 years, males and those in live in Kanto make up a larger proportion of those who find New Zealand appealing than those who do not

JAPAN

Profile of those who find New Zealand appealing

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

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



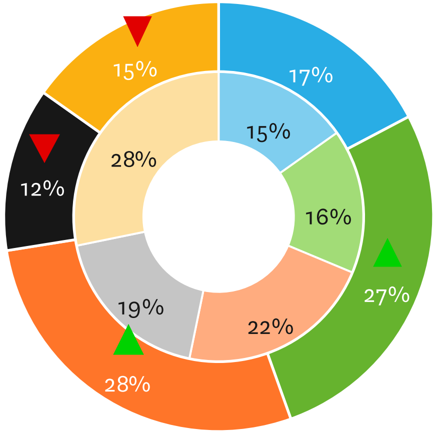
Compared to non-considerers, the profile of serious considerers is skewed away from older travellers (aged 50-74 years) and females

JAPAN

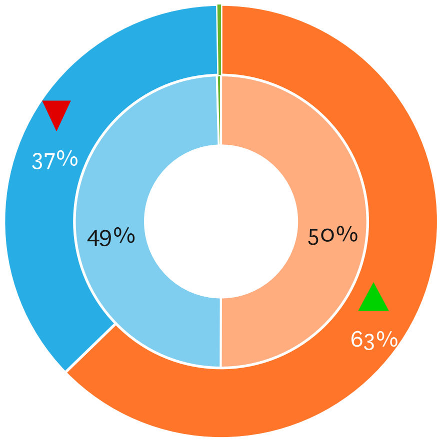
Profile of those who would seriously consider visiting New Zealand
AC Monitor | Current 5MRA | Those who would seriously consider vs. not

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

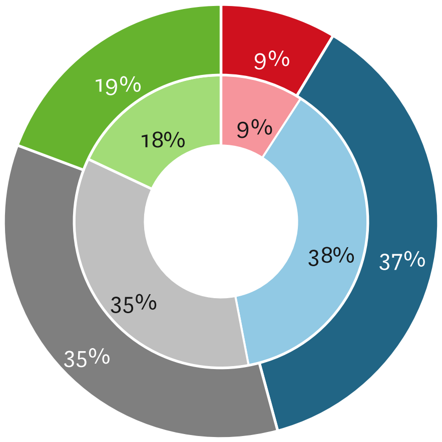
By age segment



By gender



By region



Significantly higher / lower than those who would not seriously consider

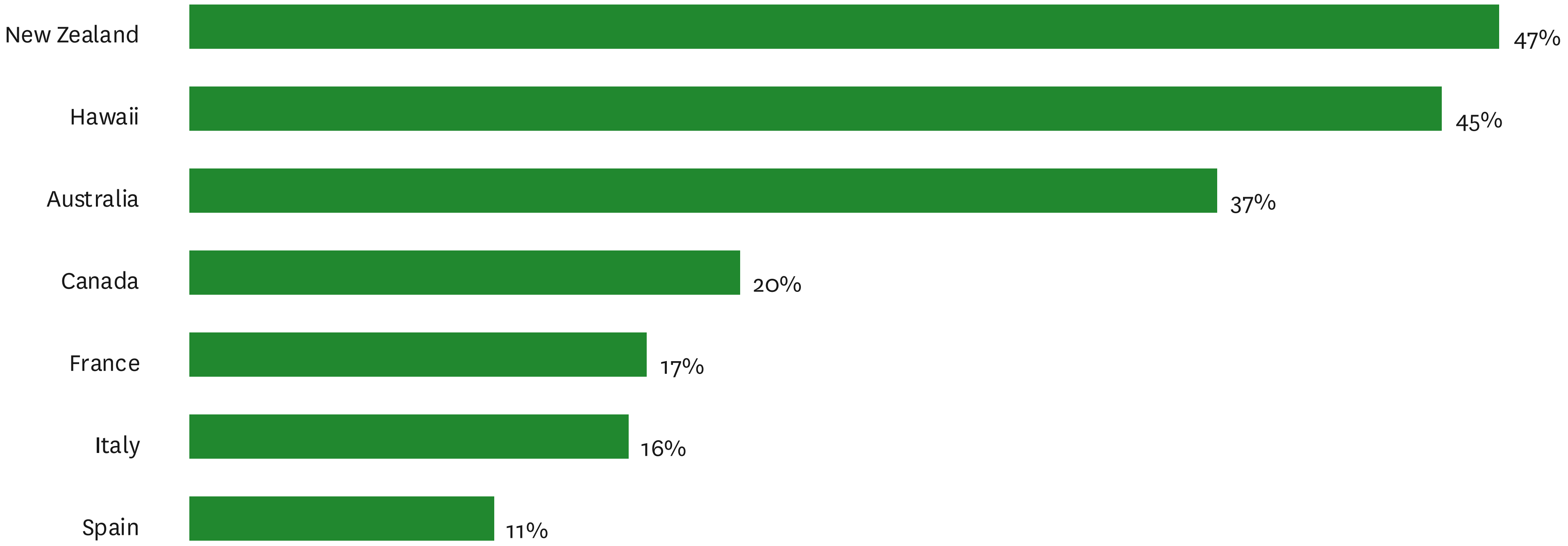
1. Sample sizes: Those who would seriously consider visiting New Zealand n = 1105 | Those who would not seriously consider visiting New Zealand n = 4117

Recall of advertising / promotion of New Zealand as a holiday destination is strong but similar to Hawaii

JAPAN

Holiday destinations seen advertised or promoted recently (Prompted Awareness)

AC Monitor | Current 5MRA | Total Active Considerers



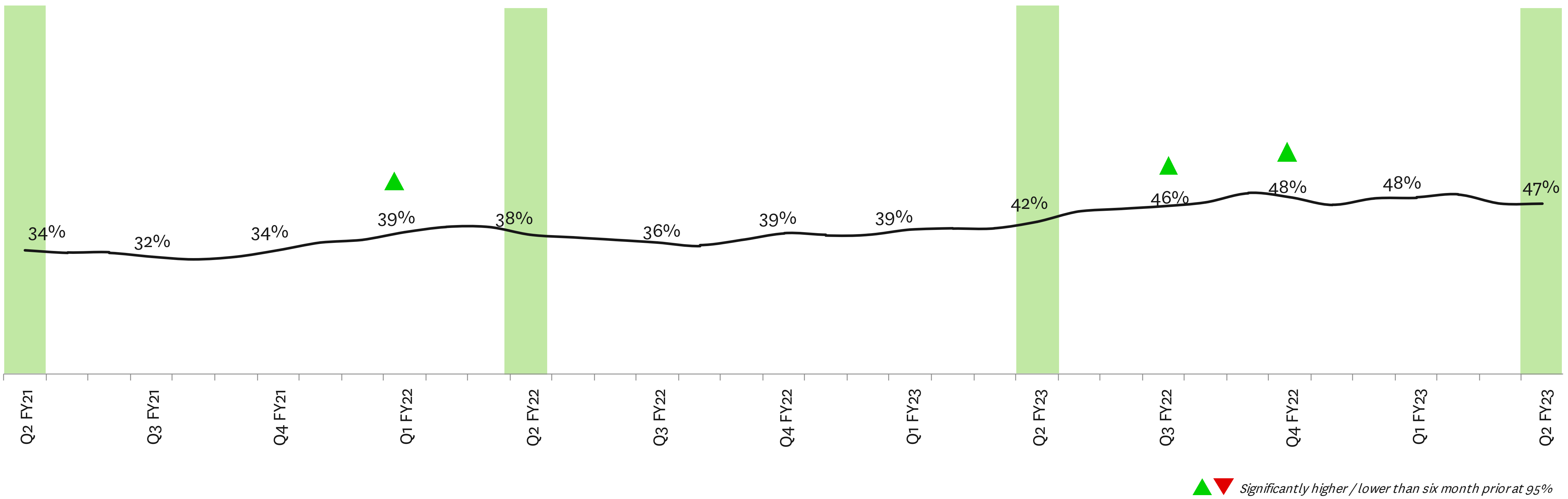
1. 1. Sample sizes: n = 750
2. Q "Which of these holiday destinations have you seen advertised or promoted recently?"

Advertising awareness for New Zealand amongst Japanese travellers has strengthened in the last year

JAPAN

Seen New Zealand advertised or promoted recently (Prompted Awareness)

AC Monitor | 6MRA | Total Active Considerers

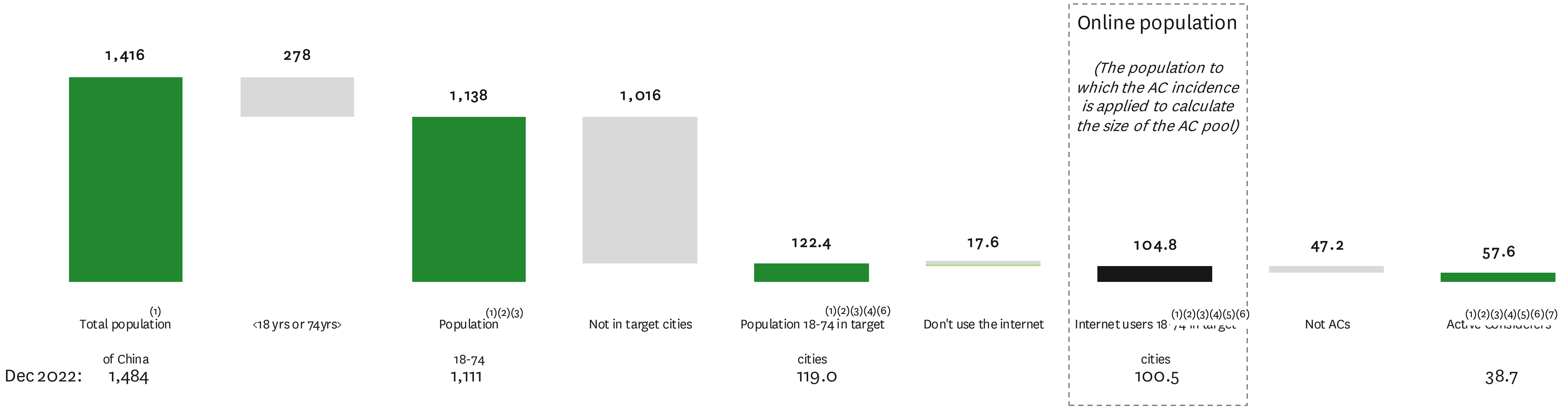


1. Sample size: Q3 FY21– Q2 FY24 (6MRA) n = 753, 1051, 1051, 902, 901, 900, 900, 900, 900, 901, 901, 900, 900
2. Q "Which of these holiday destinations have you seen advertised or promoted recently?"

Chinese Market Sizing

Nov 23| Million people

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



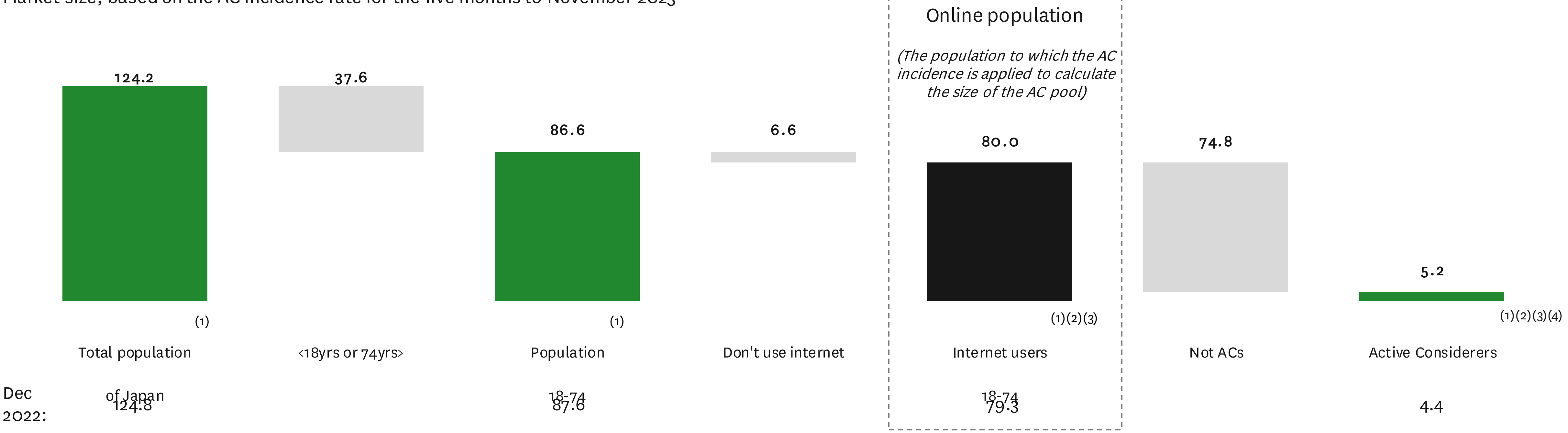
SOURCES/NOTES:

(1) National Bureau of Statistics of China, China Statistical Yearbook 2019, Total population by age and region; Time period: 2019; Coverage: All Chinese individuals, excludes Hong Kong, Macau and Taiwan
(2) Worldometer population clock, China; Time period as at mid January 2024
(3) United Nations, The World's Cities in 2018, Data Booklet; Time period: 1 July 2021; Coverage: Population of Chinese urban agglomerations with 1 million inhabitants or more
(4) Target Cities: Beijing, Changsha, Chengdu, Guangzhou, Hangzhou, Nanjing, Shanghai, Shenyang, Shenzhen, Wuhan, Xi'an, Chongqing and Tianjin
(5) CNNIC, Statistical Report on Internet Development 45th China Internet Network; Time period: June 2022; Coverage: Chinese residents aged 6+; Internet user definition: Have used Internet in the past 6 months
(6) Tourism New Zealand, Active Considerer Monitor China; Time period: Jul-Nov 2023, under the latest AC definition
(7) Kantar Analysis

Japan Market Sizing

Nov 23 | Million people

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



SOURCES/NOTES:
(1) Statistics Bureau of Japan, Population Estimates by Age (Five-Year Groups) and Sex, Time period: Provisional estimates January 1, 2024; Coverage: Total population
(2) Ministry of Internal Affairs and Communications, Communications Usage Trend Survey in 2020; Time period: September 2020; Coverage: Population aged 6+
(3) Tourism New Zealand, Active Considerer Monitor Japan; Time period: Jul-Nov 2023, under the latest AC definition
(4) Kantar Analysis

Appendix: Visitor consideration funnel

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

Organising a holiday is a process that can start with dreaming about visiting a destination, from doing some research and planning, through to making bookings for flights to that destination. In the last 12 months, have you done any research about visiting New Zealand for a holiday?

- Yes → **Planning**
  - Have you reached a stage where you are ready to make firm bookings to travel to New Zealand for a holiday?
    - Yes → **Booking**
    - No → **Planning**
- No → **Dreaming**

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