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Active Considerer (AC) Monitor Australia (H1 FY25)

Report

January 2025

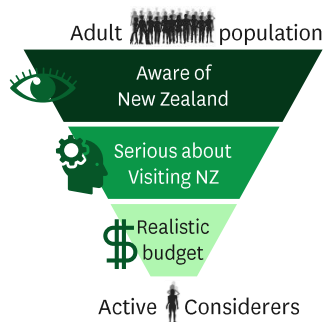# AC Monitor research specifications

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; as well as (from FY25) India and Singapore

— 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 FY25 where results are based on a 5-month period (Jul – Nov 24)

Kantar conducts a **bi-annual survey** for emerging markets:

— Canada and South Korea

— 300 ACs per country per wave

Adult population
Aware of New Zealand
Serious about Visiting NZ
Realistic budget
Active Considerers

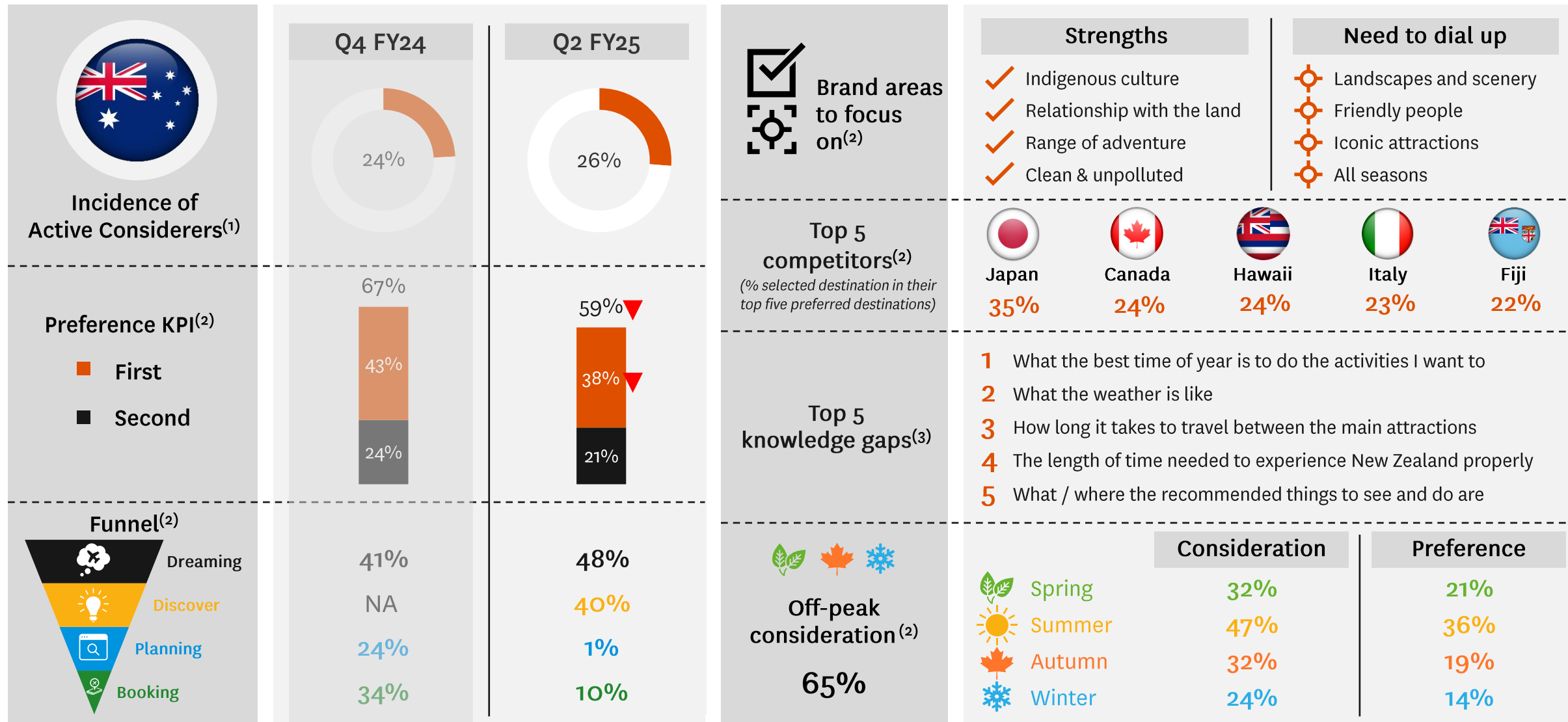We survey **Active Considerers (ACs) of New Zealand**

— 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 2024 market sizing exercise

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100% PURE NEW ZEALAND

Performance Dashboard

Incidence of Active Considerers[1]

Q4 FY24	Q2 FY25
24%	26%

Preference KPI[2]

■ First
■ Second

	Q4 FY24	Q2 FY25
Total	67%	59% ▼
First	43%	38% ▼
Second	24%	21%

Funnel[2]

	Q4 FY24	Q2 FY25
Dreaming	41%	48%
Discover	NA	40%
Planning	24%	1%
Booking	34%	10%

Brand areas to focus on[2]

Strengths
- ✓ Indigenous culture
- ✓ Relationship with the land
- ✓ Range of adventure
- ✓ Clean & unpolluted

Need to dial up
- ⊙ Landscapes and scenery
- ⊙ Friendly people
- ⊙ Iconic attractions
- ⊙ All seasons

Top 5 competitors[2]
(% selected destination in their top five preferred destinations)

Japan	Canada	Hawaii	Italy	Fiji
35%	24%	24%	23%	22%

Top 5 knowledge gaps[3]

1. What the best time of year is to do the activities I want to
2. What the weather is like
3. How long it takes to travel between the main attractions
4. The length of time needed to experience New Zealand properly
5. What / where the recommended things to see and do are

Off-peak consideration[2]

65%

	Consideration	Preference
Spring	32%	21%
Summer	47%	36%
Autumn	32%	19%
Winter	24%	14%

▲▼ *Significantly higher / lower than previous period*

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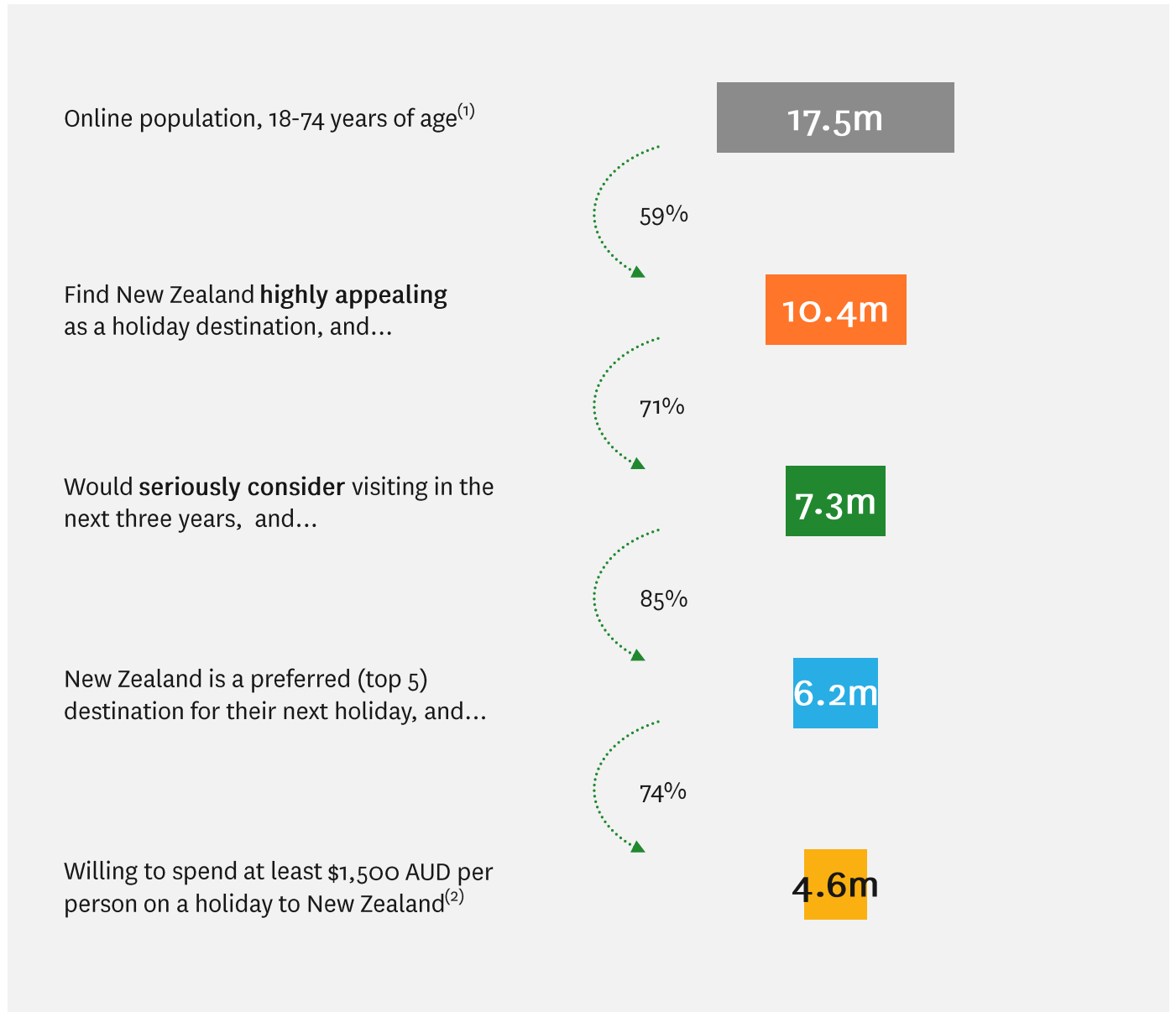
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AUSTRALIA

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1

What is the size of opportunity in Australia?
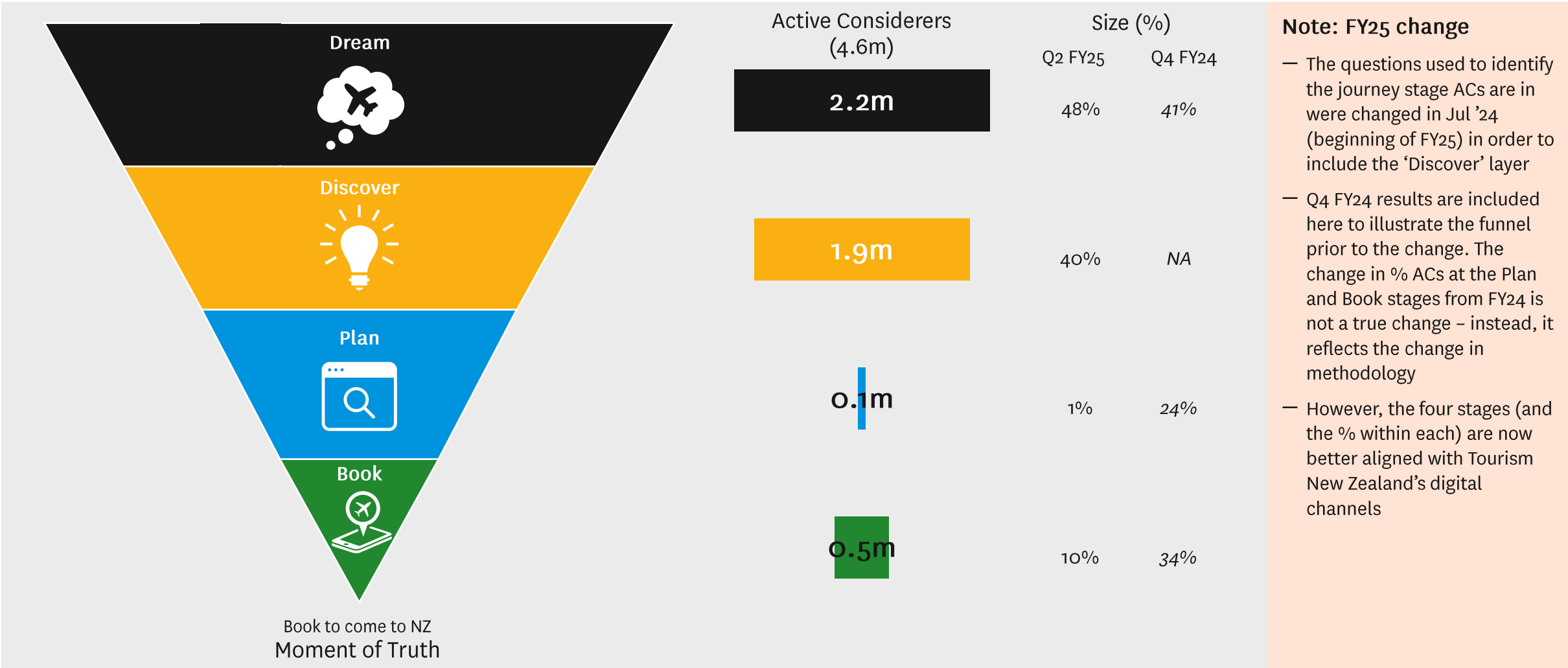
Active Considerer Funnel – Australia

Active Considerers definition

Active Considerers find New Zealand highly appealing as a holiday destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next holiday, and have a realistic budget for their visit (at least $1,500 AUD per person) to New Zealand
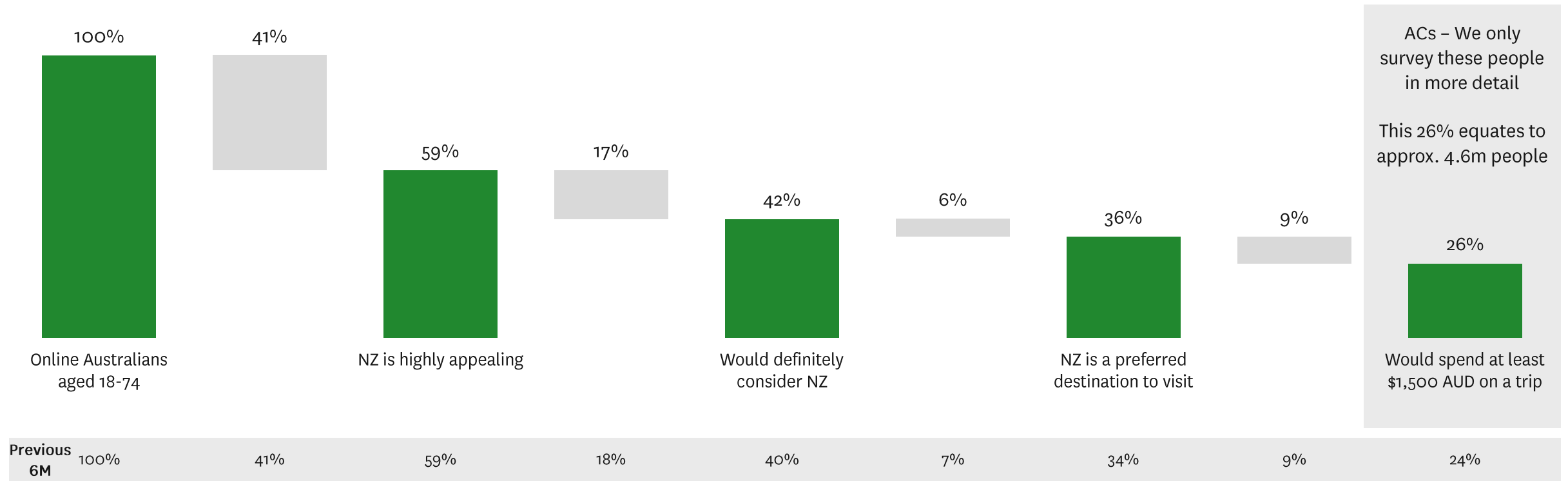
Online population, 18-74 years of age[1]

17.5m

59%

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

10.4m

71%

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

7.3m

85%

New Zealand is a preferred (top 5) destination for their next holiday, and...

6.2m

74%

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

4.6m

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Journey funnel to New Zealand – Australia

	Active Considerers (4.6m)	Size (%)	
		Q2 FY25	Q4 FY24
Dream	2.2m	48%	41%
Discover	1.9m	40%	NA
Plan	0.1m	1%	24%
Book	0.5m	10%	34%

Book to come to NZ
Moment of Truth

Note: FY25 change

— The questions used to identify the journey stage ACs are in were changed in Jul '24 (beginning of FY25) in order to include the 'Discover' layer

— Q4 FY24 results are included here to illustrate the funnel prior to the change. The change in % ACs at the Plan and Book stages from FY24 is not a true change – instead, it reflects the change in methodology

— However, the four stages (and the % within each) are now better aligned with Tourism New Zealand's digital channels

Note: The 'Discover' layer in the consumer journey funnel was added in Q2 FY25; in previous waves the funnel consisted of 'Dream', 'Plan' and 'Book' only

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With an AC incidence stable at 26%, equating to approximately 4.6 million people, Australia continues to present an attractive opportunity for TNZ

Qualifying criteria for defining ACs
AC Monitor | Current 5M | % Online users aged 18-74

| | 100% | 41% | 59% | 17% | 42% | 6% | 36% | 9% | 26% |

- 100% — Online Australians aged 18-74
- 59% — NZ is highly appealing
- 42% — Would definitely consider NZ
- 36% — NZ is a preferred destination to visit
- 26% — Would spend at least $1,500 AUD on a trip

ACs – We only survey these people in more detail

This 26% equates to approx. 4.6m people

| Previous 6M | 100% | 41% | 59% | 18% | 40% | 7% | 34% | 9% | 24% |

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

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1. The approx. AC pool size is based on the online population estimates as of November 2024 and the AC incidence rate for the current five months
2. Sample size: Q2 FY25 n = 3283 | Q4 FY24 n = 4401

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

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New Zealand's appeal is at a high level but showed little growth in the last year

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

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

▲▼ *Significantly higher / lower than six month prior at 99%*
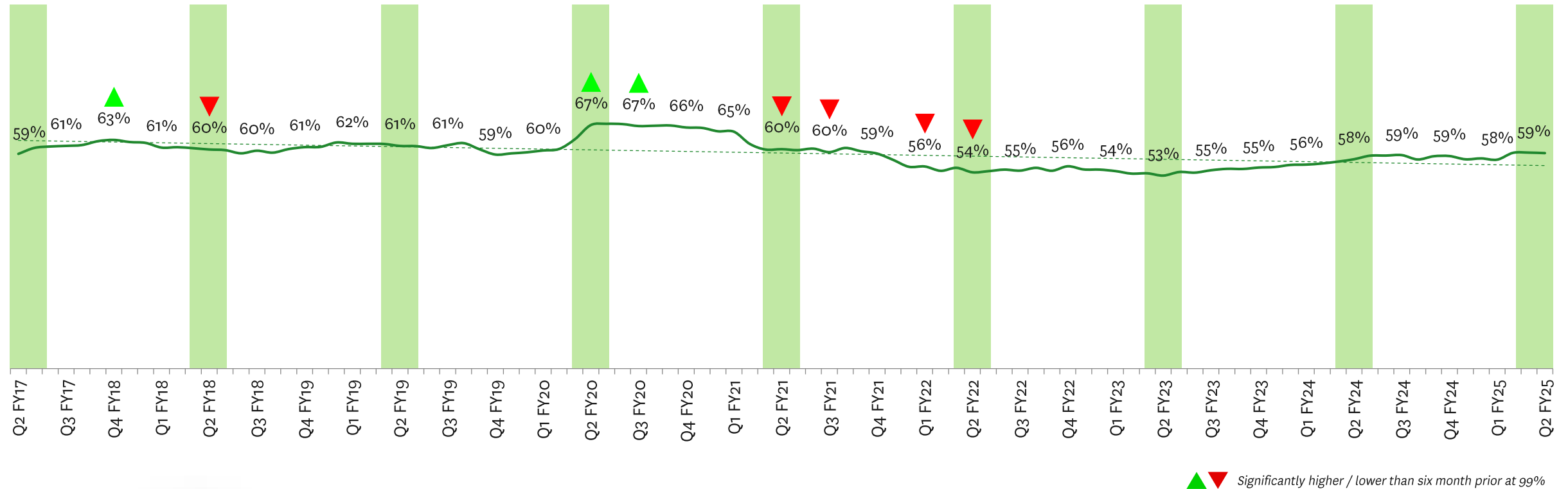
Despite a dip in Q1 FY25, the AC incidence in Australia has been showing signs of recovery over the last year
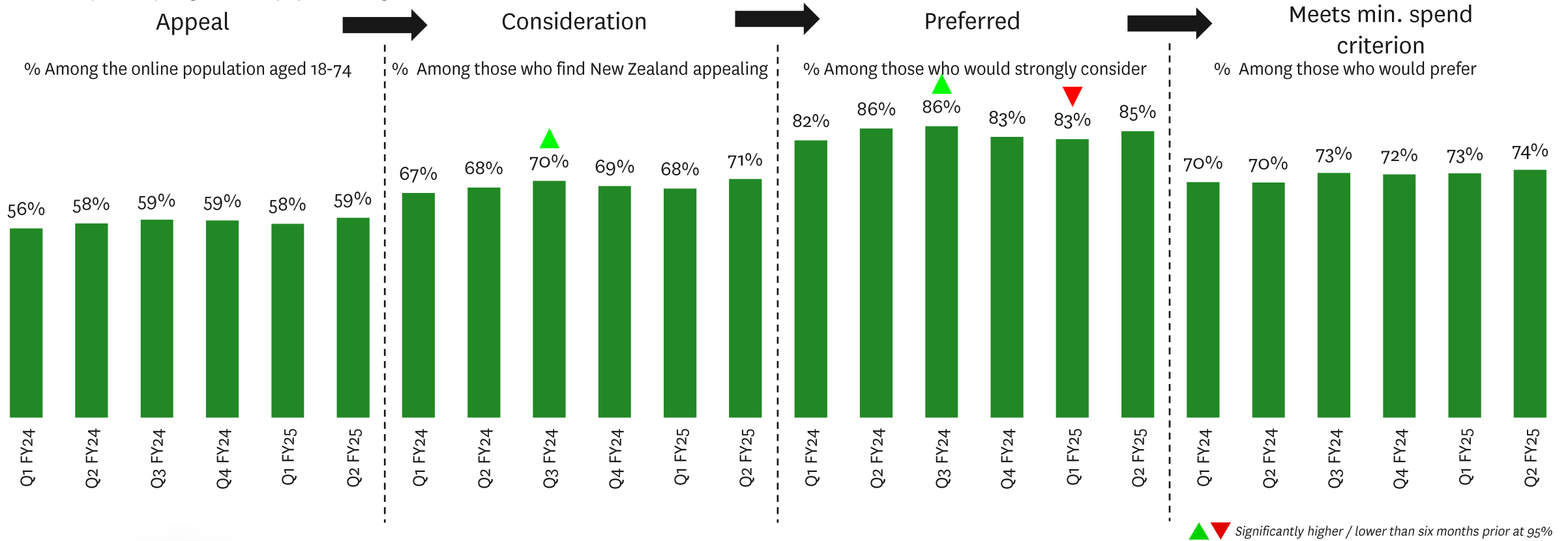
Incidence of ACs
AC Monitor | 6MRA | Target online population aged 18-74

| Q2 FY17 | Q3 FY17 | Q4 FY18 | Q1 FY18 | Q2 FY18 | Q3 FY18 | Q4 FY19 | Q1 FY19 | Q2 FY19 | Q3 FY19 | Q4 FY19 | Q1 FY20 | Q2 FY20 | Q3 FY20 | Q4 FY20 | Q1 FY21 | Q2 FY21 | Q3 FY21 | Q4 FY21 | Q1 FY22 | Q2 FY22 | Q3 FY22 | Q4 FY22 | Q1 FY23 | Q2 FY23 | Q3 FY23 | Q4 FY23 | Q1 FY24 | Q2 FY24 | Q3 FY24 | Q4 FY24 | Q1 FY25 | Q2 FY25 |
| 23% | 25% | 27% | 26% | 24% | 23% | 24% | 25% | 26% | 26% | 24% | 27% | 35% | 34% | 30% | 28% | 25% | 25% | 25% | 22% | 20% | 20% | 20% | 20% | 21% | 21% | 21% | 22% | 24% | 26% | 24% | 23% | 26% |

▲▼ *Significantly higher / lower than six month prior at 99%*
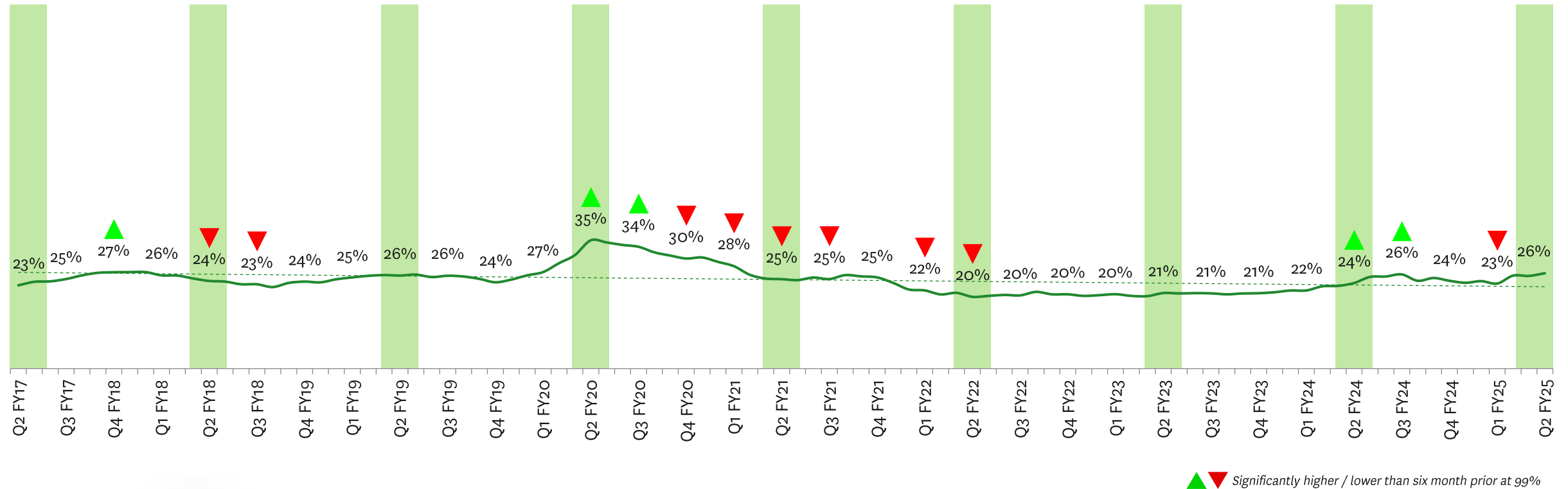
AC conversion through the funnel remains strong

Conversion of ACs through the Consideration Funnel
AC Monitor | 6MRA | Target online population aged 18-74

Appeal ➡ Consideration ➡ Preferred ➡ Meets min. spend criterion

% Among the online population aged 18-74 | % Among those who find New Zealand appealing | % Among those who would strongly consider | % Among those who would prefer

Appeal
Quarter	%
Q1 FY24	56%
Q2 FY24	58%
Q3 FY24	59%
Q4 FY24	59%
Q1 FY25	58%
Q2 FY25	59%

Consideration
Quarter	%
Q1 FY24	67%
Q2 FY24	68%
Q3 FY24	70% ▲
Q4 FY24	69%
Q1 FY25	68%
Q2 FY25	71%

Preferred
Quarter	%
Q1 FY24	82%
Q2 FY24	86%
Q3 FY24	86% ▲
Q4 FY24	83%
Q1 FY25	83% ▼
Q2 FY25	85%

Meets min. spend criterion
Quarter	%
Q1 FY24	70%
Q2 FY24	70%
Q3 FY24	73%
Q4 FY24	72%
Q1 FY25	73%
Q2 FY25	74%

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

1. Sample size: Q1 FY24 – Q2 FY25 (6MRA): Appeal n = 4741, 4240, 3961, 4401, 4512, 3283 | Consider n = 2597, 2391, 2265, 2525, 2582, 1916 | Prefer n = 1650, 1566, 1507, 1620, 1632, 1281 | Spend n = 1333, 1326, 1280, 1302, 1299, 1059
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"
3. Question "Would you consider visiting New Zealand for a holiday within the next three years?"
4. Question "To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"
5. Question "On a per person basis, how much would you be willing to spend on a holiday to New Zealand?"

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With 4.6 million ACs and strong conversion through the funnel, Australia presents a sizable opportunity to drive arrivals

		Appeal % Online users aged 18-74	AC incidence % Online users aged 18-74	Size of AC pool Million people
	Australia	59%	26%	4.6
	China	85%	58%	62.1
	USA	55%	28%	59.5
	UK	57%	23%	10.3
	Germany	57%	16%	8.6
	Japan	31%	5%	3.8
	India	75%	34%	13.9
	Singapore	59%	23%	0.8
	South Korea	48%	14%	5.4
	Canada	55%	28%	7.8
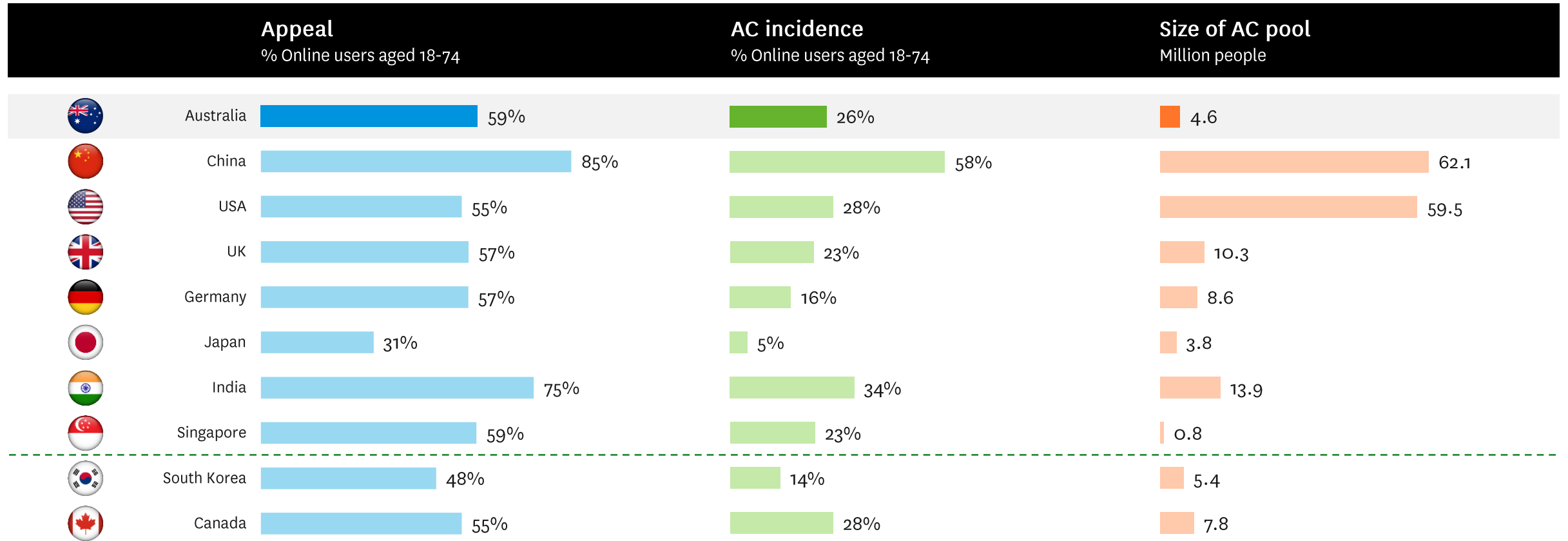
Compared to non-ACs, ACs are more likely to be aged 50 - 59 years; apart from this difference, the profiles of ACs and non-ACs are similar

Profile of Active Considerers
AC Monitor | Current 5M | Active Considerers vs Non-Active Considerers

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

By age segment
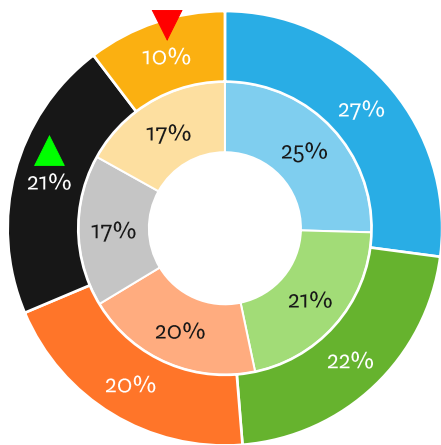
- 18 - 29 years
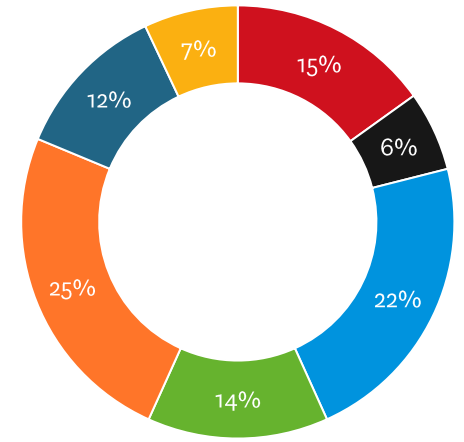- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years
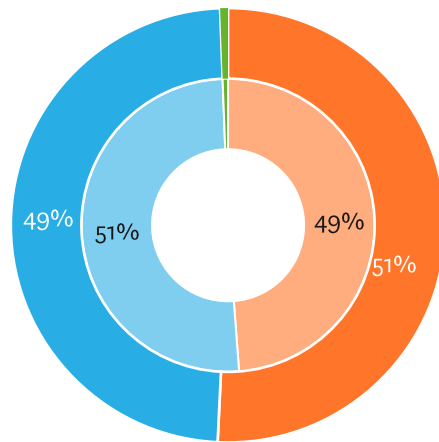
By gender

- Male
- Female
- Gender diverse

By region
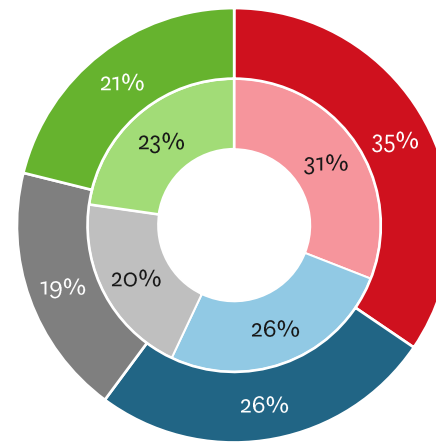
- NSW
- VIC
- QLD
- Rest of Aust

Household Composition

- Living alone
- Living with friends / flat mates
- Couple – no children
- Family with mainly pre-school children
- Family with mainly school-age children
- Family with mainly independent children
- Living at home with my parents

▲ ▼ *Significantly higher / lower than non-ACs*

Interest in visiting New Zealand in the summer has increased over the last 6 months, however the opportunity to drive off-peak arrivals remains sizable, even with the decline in preference for spring
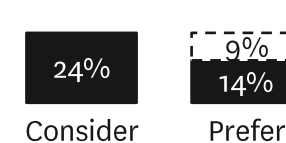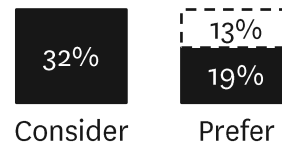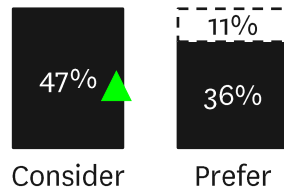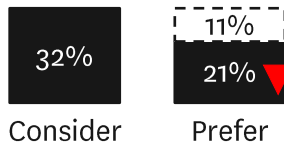
Seasons – Consideration & Preference
AC Monitor | Current 5M | Total Active Considerers

Conversion of consideration to preference

	65%	**76%**	**59%**	**61%**	Off-peak consideration

☐ Opportunity

	Spring Off-peak		Summer Peak		Autumn Off-peak		Winter Off-peak		
	Consider	Prefer	Consider	Prefer	Consider	Prefer	Consider	Prefer	
Current	32%	21% (11% opp)	47% ▲	36% (11% opp)	32%	19% (13% opp)	24%	14% (9% opp)	65%

Off-peak consideration donut: **65%**
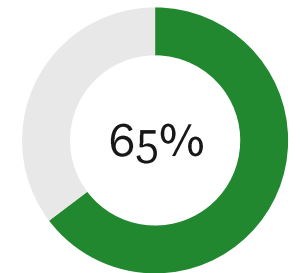
Previous 6M	36%	25%	41%	32%	30%	19%	24%	16%	68%

🌱 Spring Off-peak   ☀ Summer Peak   🍁 Autumn Off-peak   ❄ Winter Off-peak   🌱 🍁 ❄

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

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Over the last year, the interest to travel to New Zealand in summer has been increasing while autumn experienced a dip in interest; despite this, total off-peak consideration remains broadly stable

Seasonal Consideration
AC Monitor | 6MRA | Total Active Considerers

Total Off-Peak: 68% · 70% · 68% · 66% · 65%

Summer: 42% · 40% · 41% · 46% ▲ · 47% ▲

Spring: 35% · 36% · 36% · 35% · 32%

Autumn: 35% · 35% · 30% ▼ · 29% ▼ · 32%

Winter: 25% · 26% · 24% · 24% · 24%

Q2 FY24 · Q3 FY24 · Q4 FY24 · Q1 FY25 · Q2 FY25

- Total Off-Peak
- Spring
- Summer
- Autumn
- Winter

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

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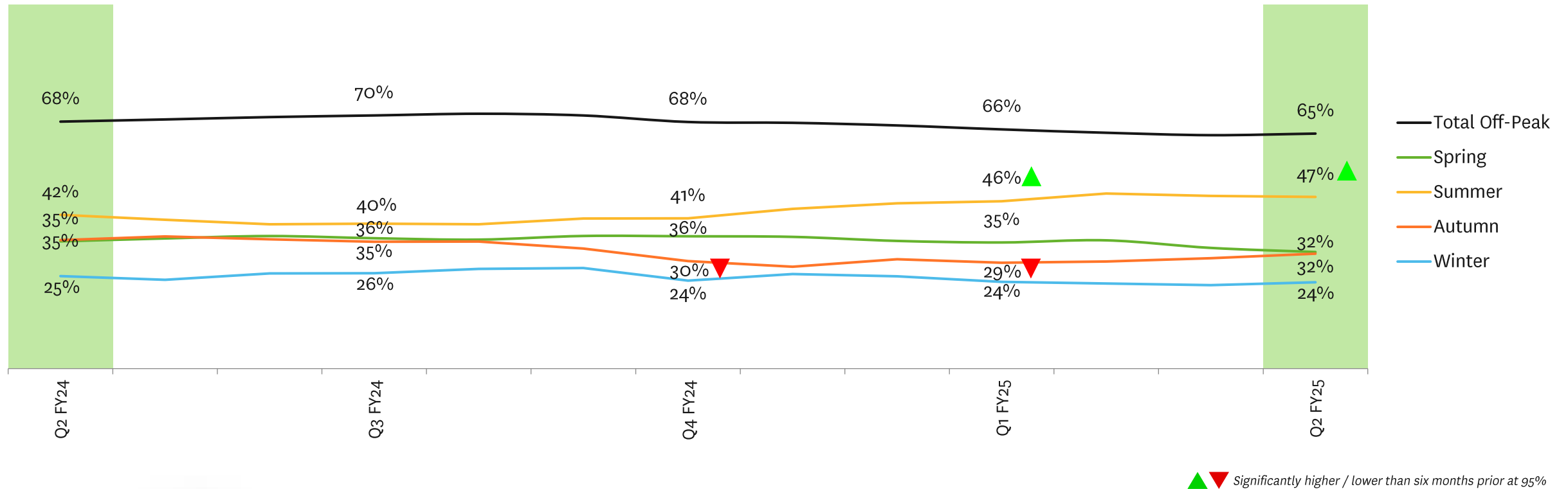
Preference to travel to New Zealand across off-peak seasons has dipped over the last few quarters, driven by a decrease in preference for both autumn and spring

Seasonal Preference
AC Monitor | 6MRA | Total Active Considerers

— Total Off-Peak
— Spring
— Summer
— Autumn
— Winter

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

1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 900, 900, 900, 901, 751
2. Question "When would you prefer to visit New Zealand?"
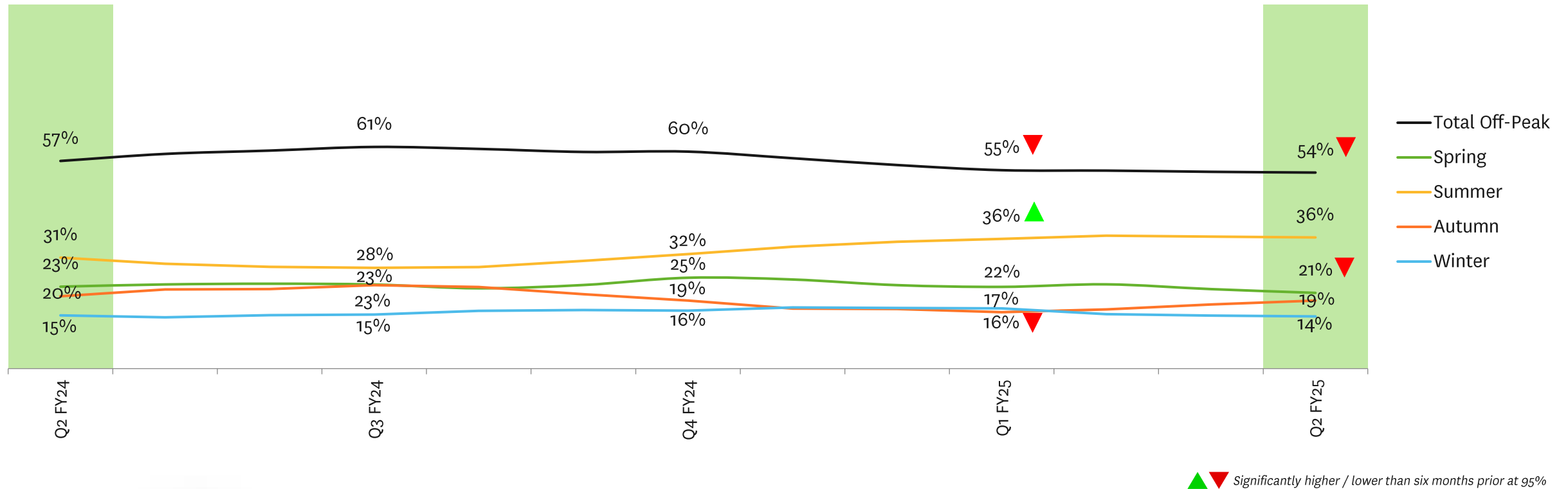
Spring considerers skew older and towards New South Wales, while winter considerers skew younger and towards Queensland – consider this when targeting; autumn may be a more lucrative opportunity as these considerers skew towards higher income households

Profile of Seasonal Considerers
AC Monitor | Current 5M |
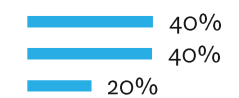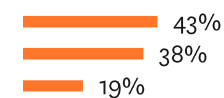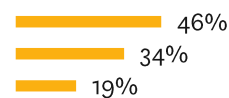Total Active Considerers

	Spring Off-peak	Summer Peak	Autumn Off-peak	Winter Off-peak
Male	49%	53%	54%	51%
Female	49%	46%	45%	48%
Gender diverse	1%	1%	1%	1%
18 to 29 yrs	20% ▼	26%	27%	36% ▲
30 to 39 yrs	22%	21%	20%	26%
40 to 49 yrs	19%	21%	19%	10% ▼
50 to 59 yrs	24%	23%	22%	22%
60 to 74 yrs	15% ▲	9%	12%	5% ▼
NSW	29% ▼	36%	33%	33%
VIC	27%	25%	27%	20%
QLD	18%	18%	18%	28% ▲
Rest of Australia	26% ▲	21%	21%	19%
Less than AUD $49,999	13%	13%	10% ▼	12%
AUD $50,000 – AUD $89,999	22%	21%	22%	20%
AUD $90,000 – AUD $139,999	33%	32%	38% ▲	34%
AUD $140,000 or more	30%	30%	28%	32%
SINK / DINK	43%	46%	43%	40%
Family (dependent children)	36%	34%	38%	40%
Family (independent children)	21%	19%	19%	20%

The demographic profile of off-peak considerers skews towards higher-income households, making this audience a more lucrative target market

Profile of Off-Peak Considerers
AC Monitor | Current 5M | Off-Peak Considerers

	Off-Peak Considerers	Peak-Only Considerers
Male	52%	49%
Female	47%	51%
Gender diverse	1%	0%
18 to 29 yrs	28%	25%
30 to 39 yrs	23%	20%
40 to 49 yrs	17% ▼	24%
50 to 59 yrs	21%	22%
60 to 74 yrs	11%	9%
NSW	33%	38%
VIC	26%	25%
QLD	20%	17%
Rest of Australia	21%	20%
Less than AUD $49,999	11% ▼	19%
AUD $50,000 – AUD $89,999	24%	25%
AUD $90,000 – AUD $139,999	34%	28%
AUD $140,000 or more	29%	22%
SINK / DINK	41%	47%
Family (dependent children)	41%	34%
Family (independent children)	19%	19%

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

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With 65% off-peak consideration, the opportunity to drive off-peak arrivals among Australian ACs is sizeable with each shoulder season presenting equal levels of opportunity

Seasonal Consideration	Total off-peak % ACs		🌿 Spring Off-Peak	☀️ Summer Peak	🍁 Autumn Off-Peak	❄️ Winter Off-Peak
Australia	65%		32%	47%	32%	24%
China	84%		34%	30%	44%	31%
USA	65%		26%	49%	35%	20%
UK	57%		21%	48%	26%	19%
Germany	62%		31%	45%	24%	18%
Japan	68%		32%	42%	35%	18%
India	75%		31%	45%	36%	29%
Singapore	78%		35%	26%	39%	24%
South Korea	78%		35%	22%	38%	19%
Canada	63%		21%	50%	39%	23%

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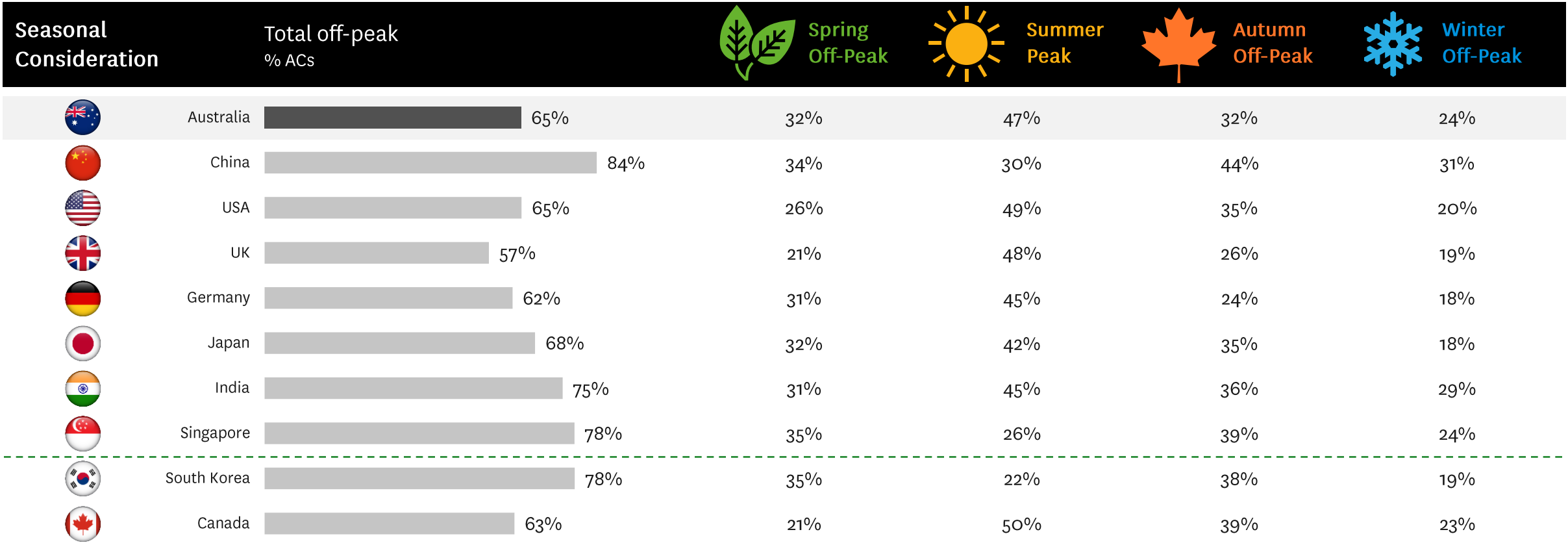
2 How can TNZ drive desirability of New Zealand as a holiday destination?

Marketing messages should emphasize the key motivations for visiting New Zealand which remain consistent over time, namely its beautiful scenery and opportunities for relaxation as well as fun

Reasons to visit New Zealand for a holiday
AC Monitor | Current 5M | Total Active Considerers

Previous 6 months

Reason	Current	Previous 6 months
To experience beautiful landscapes/scenery	56%	60%
To feel relaxed and refreshed	51%	50%
To have fun & enjoy myself	48%	55%
To learn & explore new things	44%	49%
To enjoy local food and beverages	42%	40%
To take a break from the routine, stresses and pressures of everyday life	39%	41%
To get in touch with nature	36%	41%
To feel a sense of adventure	35%	42%
To create lasting memories through photography	28%	28%
To interact with people of a different culture or lifestyle	28%	29%
To connect and spend time with important people in my life	26%	28%
To visit a place that has inspired me through film / TV	25% ▲	18%
To indulge & pamper myself	22%	16%
To embrace challenges and personal growth	14%	13%
To show my children a different way of life	13%	17%
For a specific event (e.g. sport event, family wedding etc.)	9%	10%

▲▼ *Significantly higher / lower than previous period*

Sample size: Current 5M n = 300 | Previous 6M n = 450
Question "Why do you want to visit New Zealand for a holiday?"

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Compared to peak-only considerers, off-peak considerers are more likely to have been inspired to visit New Zealand through film / TV, and to indulge and pamper themselves

Reasons to visit New Zealand for a holiday
AC Monitor | Current 5M | Off-Peak Considerers

Peak-Only Considerers

Reason	Off-Peak	Peak-Only
To feel relaxed and refreshed	54%	46%
To experience beautiful landscapes/scenery	53%	61%
To have fun & enjoy myself	52%	42%
To learn & explore new things	42%	47%
To enjoy local food and beverages	41%	42%
To feel a sense of adventure	38%	30%
To get in touch with nature	38%	32%
To take a break from the routine, stresses and pressures of everyday life	37%	43%
To visit a place that has inspired me through film / TV	29% ▲	18%
To create lasting memories through photography	27%	30%
To interact with people of a different culture or lifestyle	27%	30%
To indulge & pamper myself	25% ▲	15%
To connect and spend time with important people in my life	25%	28%
To embrace challenges and personal growth	16%	10%
To show my children a different way of life	12%	15%
For a specific event (e.g. sport event, family wedding etc.)	10%	7%

▲ ▼ *Significantly higher / lower than Peak-Only Considerers*

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Sample size: Off-Peak Considerers n = 192 | Peak-Only Considerers n = 108
Question "Why do you want to visit New Zealand for a holiday?"

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Japan, Hawaii and Canada remain New Zealand's top competitors in terms of preference; the interest in Europe is growing while Tasmania has slipped out of the top 10, leaving Queensland as the only domestic competitor within the top 10

Top ten competitor set for ACs
AC Monitor | Current 5M vs. Previous 6M |
Total Active Considerers

Canada
24%
(24%)

UK
21%
(21%)

France
19%
(15%)

Italy
23%
(22%)

Greece
18%
(15%)

Japan
35%
(39%)

Hawaii
24%
(24%)

Bali
17%
(21%)

Fiji
22%
(22%)

Queensland
22%
(19%)
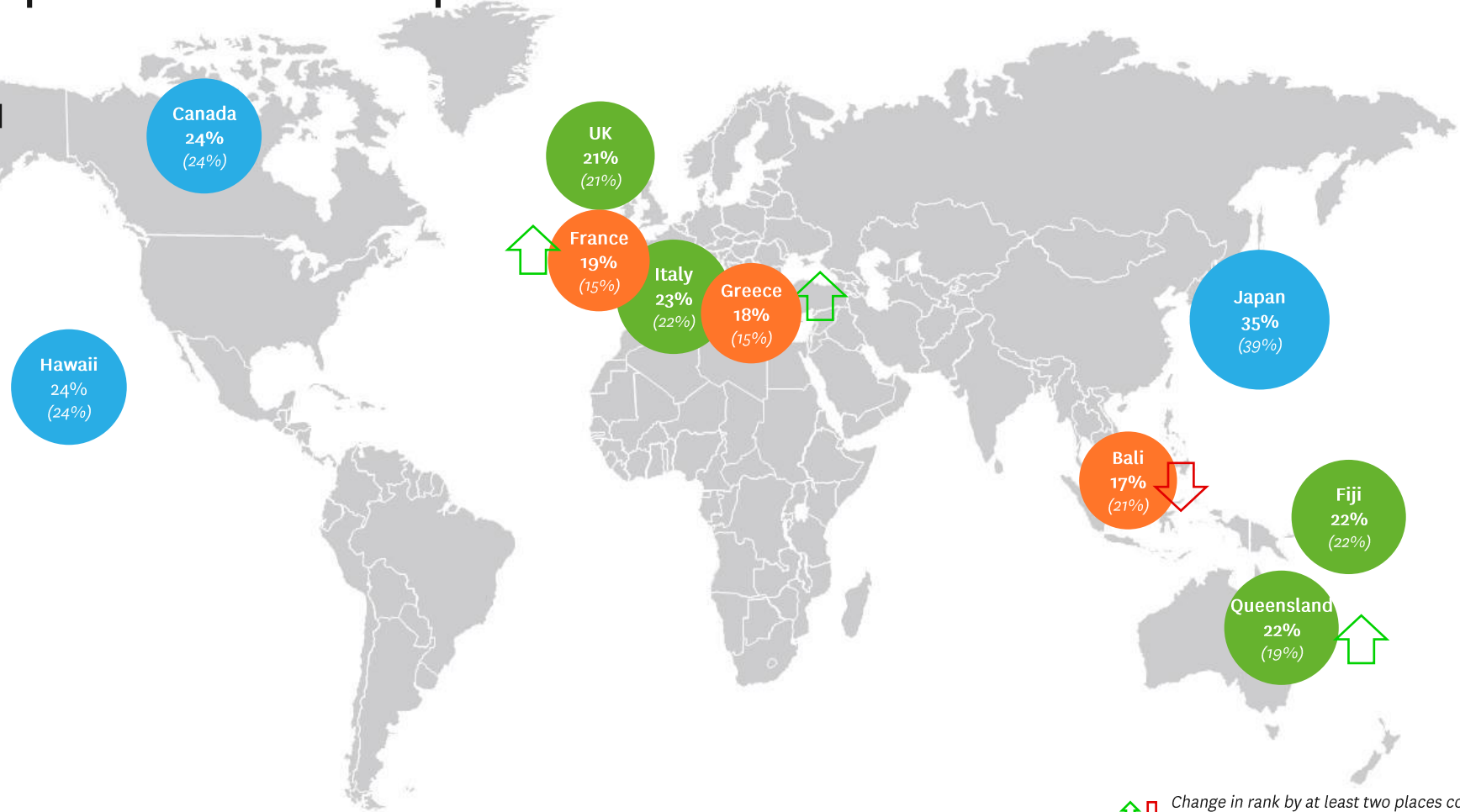
Tasmania has dropped from ranking 8th to ranking 11th at the close of the year

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 5M n = 751; 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?"

KANTAR

100% PURE
NEW ZEALAND

As with ACs as a whole, Japan, Canada and Hawaii are the top competitors among off-peak considerers – both Queensland and Tasmania are within the top 10

Top ten competitor set for off-peak considerers
AC Monitor | Current 5M vs. Previous 6M |
Off-Peak Considerers

Canada
25%
(27%)

UK
23%
(21%)

France
20%
(14%)

Italy
23%
(21%)

Greece
18%
(14%)

Japan
37%
(41%)

Hawaii
23%
(24%)

Fiji
18%
(22%)

Queensland
20%
(18%)

Tasmania
18%
(20%)
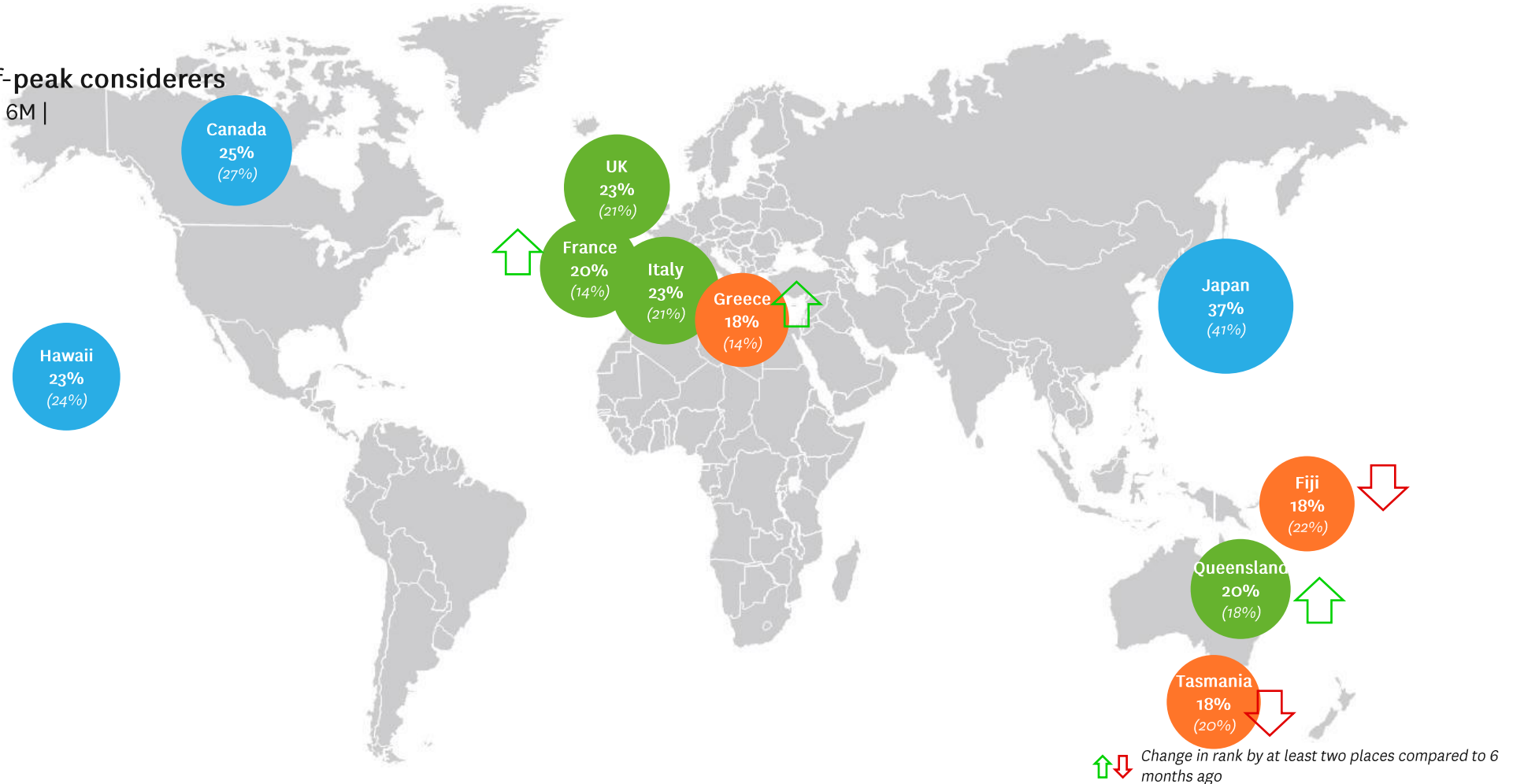
Bali has gone from 9th position to 11th position and Singapore from 10th to 15th position

Legend
- 🔵 Top 3
- 🟢 Rank 4-7
- 🟠 Rank 8-10

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

KANTAR

100% PURE NEW ZEALAND

Among ACs, preference for New Zealand has recently dipped, but the long-term trend is stable

New Zealand Preference KPI
AC Monitor | 6MRA | Total Active Considerers

Over the past 2 years, preference appears to decline in the first half of the year (Q1 / Q2) and increase in the second half (Q3 / Q4)

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

KANTAR

100% PURE NEW ZEALAND

26
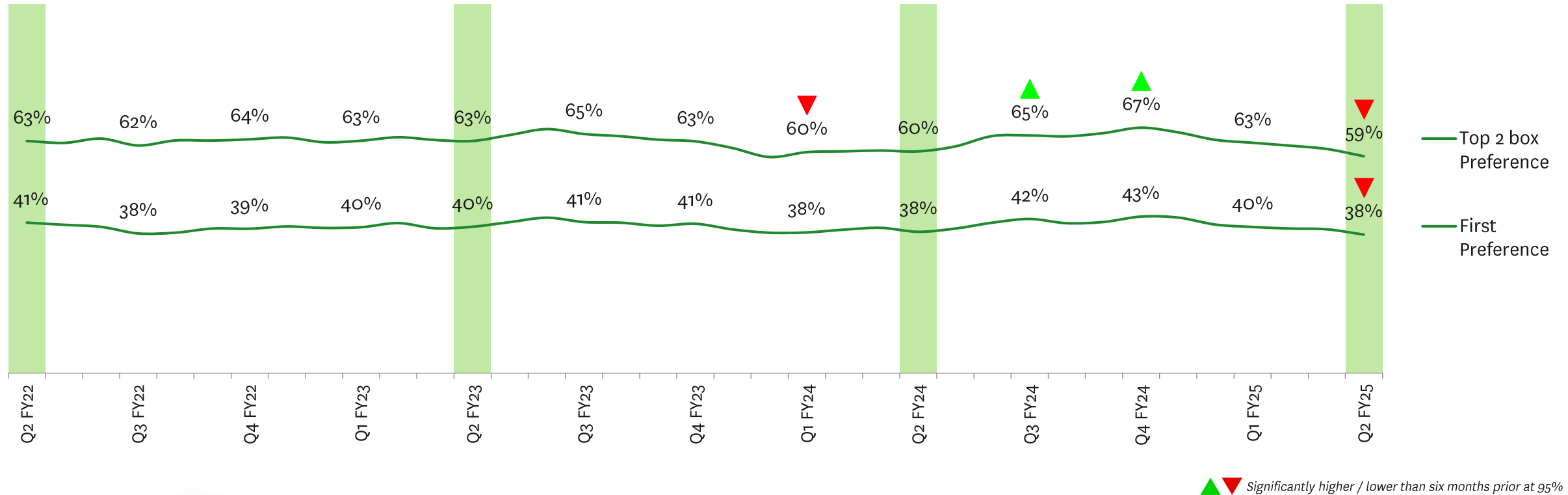
Among off-peak considerers, preference for New Zealand peaked in Q4 FY24 but has since returned to levels seen a year ago

New Zealand Preference KPI
AC Monitor | 6MRA | Off-peak Considerers
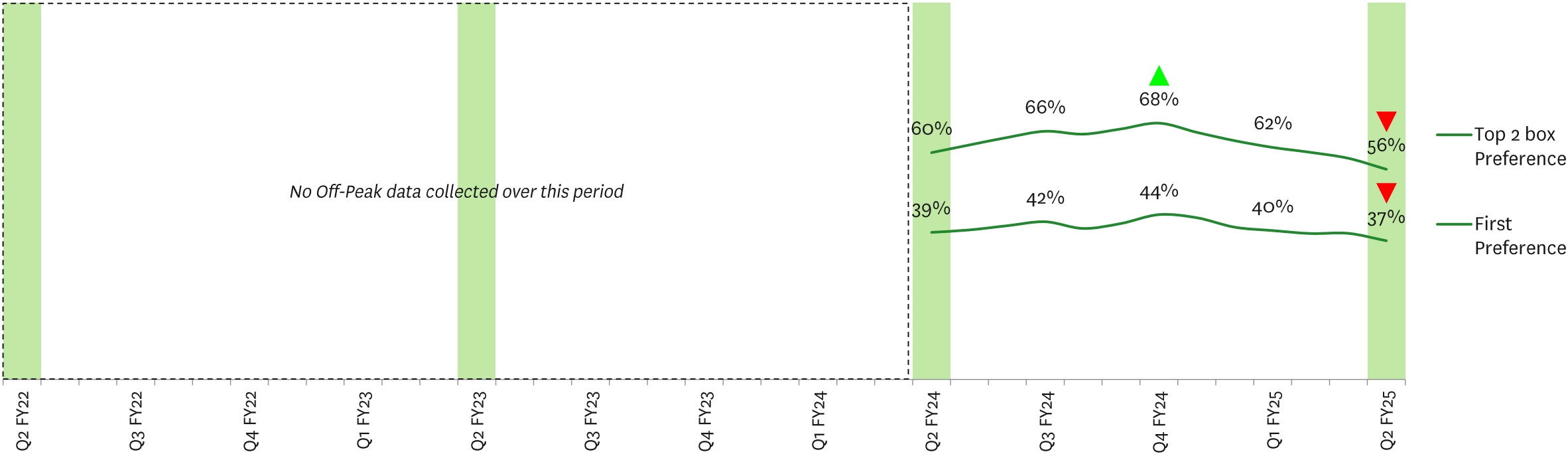
No Off-Peak data collected over this period

Top 2 box Preference: 60%, 66%, 68%, 62%, 56%

First Preference: 39%, 42%, 44%, 40%, 37%

Q2 FY22 | Q3 FY22 | Q4 FY22 | Q1 FY23 | Q2 FY23 | Q3 FY23 | Q4 FY23 | Q1 FY24 | Q2 FY24 | Q3 FY24 | Q4 FY24 | Q1 FY25 | Q2 FY25

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

1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 606, 625, 618, 595, 489
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

KANTAR

100% PURE NEW ZEALAND

A framework to organise and optimise the brand associations that matter

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** NZ

Channels: Paid, Owned, Earned

Key Category Differentiators

What are the key category issues that TNZ can use to stand out, motivate and **drive cut-through** with ACs?

Channels: Paid, Owned, Earned & Trade

Low Priority Drivers

NZ Drivers that allow us to **differentiate** but are not core to "who we are", does not drive mental availability, emotional resonance

Channels: Owned

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

Channels: Owned, Trade

Categorising brand associations to the framework...

Strategic Brand Drivers

- Relax & refresh
- All seasons
- Landscapes & scenery
- Relationship with the land
- Unique experiences
- Iconic attractions
- Friendly people
- Indigenous culture

Key Category Differentiators

- Local culture
- Clean & unpolluted
- Wildlife experience
- Range of experiences
- Quality food & wine
- Range of adventure
- Amazing beaches
- Escape the ordinary

Low Priority Drivers

- Interesting cities

Hygiene Factors

- Safe destination
- Fun & enjoyment
- Family friendly
- Excitement
- Easy to travel around
- Affordable to fly to
- Affordable activities

Context to preference driver analysis

Using Jaccard's analysis, we estimate which brand attributes and destination attributes drive preference for New Zealand and how New Zealand performs relative to its key competitors in order to identify priorities for 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-24 to Nov-24

KANTAR

While excitement, nature, adventure continue to drive preference for NZ, there is an opportunity to promote 'all seasons", "iconic" and leverage "clean/unpolluted

Drivers of preference for NZ
AC Monitor | Rank | 2024 (Jul-Dec 24) | Total Active Considerers

Latest results	2024 rank	2023 rank	2022 rank[1]
Excitement	1	1	*
Landscapes & scenery	2	2	2
Range of adventure	3	4	1
Clean & unpolluted	4 ⬆	13	9
Friendly people	5	9 ⬇	4
Safe destination	6	7	3
Range of experiences	7	11	8
Iconic attractions	8 ⬆	17	21
Family friendly	9 ⬆	18 ⬇	6
All seasons	10 ⬆	21 ⬆	26
Easy to travel around	11 ⬆	20 ⬇	14
Fun & enjoyment	12 ⬇	3	5
Affordable to fly to	13	15 ⬆	22
Unique experiences	14 ⬇	6 ⬆	12
Indigenous culture	15	19	20

Latest results	2024 rank	2023 rank	2022 rank[1]
Local culture	16 ⬆	22 ⬇	10
Escape the ordinary	17 ⬇	12 ⬆	19
Relationship with the land	18 ⬇	10 ⬆	15
Quality food & wine	19	16	17
Amazing beaches	20 ⬆	26	*
Relax & refresh	21 ⬇	8 ⬆	18
Interesting cities	22	23	23
Wildlife experience	23	24	24
Affordable activities	24	25 ⬆	31

Changes in brand attribution list affect comparability in ranking over time

Strategic Brand Drivers
Key Category Differentiators
Low Priority Drivers
Hygiene Factors

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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 five or more places

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

31

New Zealand as a destination performs more strongly on the higher impact drivers, most notably landscapes and scenery, but more could be done to build perceptions of 'excitement', the top driver of preference, as well as 'all seasons' and 'iconic attractions'

Brand Associations of New Zealand x Impact on preference
AC Monitor | Current 5M | Total Active Considerers

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

Impact on preference (Higher / Lower)

Excitement

Landscapes & scenery

Clean & unpolluted

Range of adventure

Friendly people

Range of experiences

Safe destination

All seasons

Iconic attractions

Easy to travel around

Family friendly

Fun & enjoyment

Affordable to fly to

Unique experiences

Indigenous culture

Escape the ordinary

Relationship with the land

Local culture

Amazing beaches

Relax & refresh

Quality food & wine

Interesting cities

Wildlife experience

Affordable activities

Average

Weaker ⟶ Stronger

Level of association with New Zealand

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

32

Among off-peak considerers there is also room to build perceptions of friendliness and the ease of travelling around New Zealand

Brand Associations of New Zealand x Impact on preference | Off-Peak Considerers

AC Monitor | Current 5M | Off-Peak considerers

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

Average

Higher

Impact on preference

Excitement

Landscapes & scenery

Clean & unpolluted

Friendly people

Range of adventure

Range of experiences

Safe destination

All seasons

Iconic attractions

Easy to travel around

Family friendly

Average

Affordable to fly to

Fun & enjoyment

Unique experiences

Indigenous culture

Local culture

Relationship with the land

Escape the ordinary

Amazing beaches

Relax & refresh

Quality food & wine

Interesting cities

Wildlife experience

Lower

Weaker ⟶ Stronger

Level of association with New Zealand

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100% PURE NEW ZEALAND

New Zealand's key competitive strengths include its indigenous culture and land relationship, its range of adventure and wildlife experiences and its cleanliness; however, focus is needed on boosting its competitive positioning across several strategic drivers and category differentiators

Relative brand positioning for Strategic Brand Drivers and Key Category Differentiators
AC Monitor | Current 5M | Total Active Considerers (New Zealand and top five competitors) | Index (see appendix)

		New Zealand	Japan	Canada	Hawaii	Italy	Fiji
Strategic Brand Drivers	Landscapes & scenery	102	98	123	95	89	93
	Friendly people	93	94	109	105	86	113
	Iconic attractions	87	122	115	88	138	64
	All seasons	94	94	92	116	98	107
	Unique experiences	89	122	97	101	113	83
	Indigenous culture	122	91	73	115	59	120
	Relationship with the land	119	91	89	115	61	109
	Relax & refresh	93	73	83	125	90	136
Key Category Differentiators	Range of adventure	110	82	115	104	83	101
	Clean & unpolluted	118	100	113	90	64	101
	Range of experiences	84	106	114	96	120	91
	Local culture	87	113	88	99	110	108
	Escape the ordinary	86	107	101	104	110	101
	Quality food & wine	102	109	79	76	176	71
	Amazing beaches	94	50	53	161	87	150
	Wildlife experience	128	67	173	89	45	85

Actions for TNZ:

Strengths:
— Wildlife experiences
— Indigenous culture
— Relationship with the land
— Range of adventure
— Clean & unpolluted

Drivers to dial up:
— Landscapes and scenery
— Friendly people
— Iconic attractions
— All seasons
— Unique experiences
— Relax and refresh

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

KANTAR   100% PURE NEW ZEALAND

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

Relative brand positioning for Hygiene Factors and Low Priority

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

		New Zealand	Japan	Canada	Hawaii	Italy	Fiji
Hygiene Factors	Excitement	88	109	95	99	124	94
	Safe destination	104	118	114	78	100	85
	Family friendly	102	87	98	116	79	113
	Easy to travel around	105	103	92	103	93	100
	Fun & enjoyment	89	94	111	102	115	99
	Affordable to fly to	163	109	45	61	43	136
	Affordable activities	122	96	84	83	67	130
Low Priority	Interesting cities	83	135	117	69	163	54

Actions for TNZ:

Strengths:
— Affordable to fly to
— Affordable activities

Drivers to dial up:
— Excitement
— Fun & Enjoyment

Relative weakness [100] Relative strength

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

100% PURE NEW ZEALAND
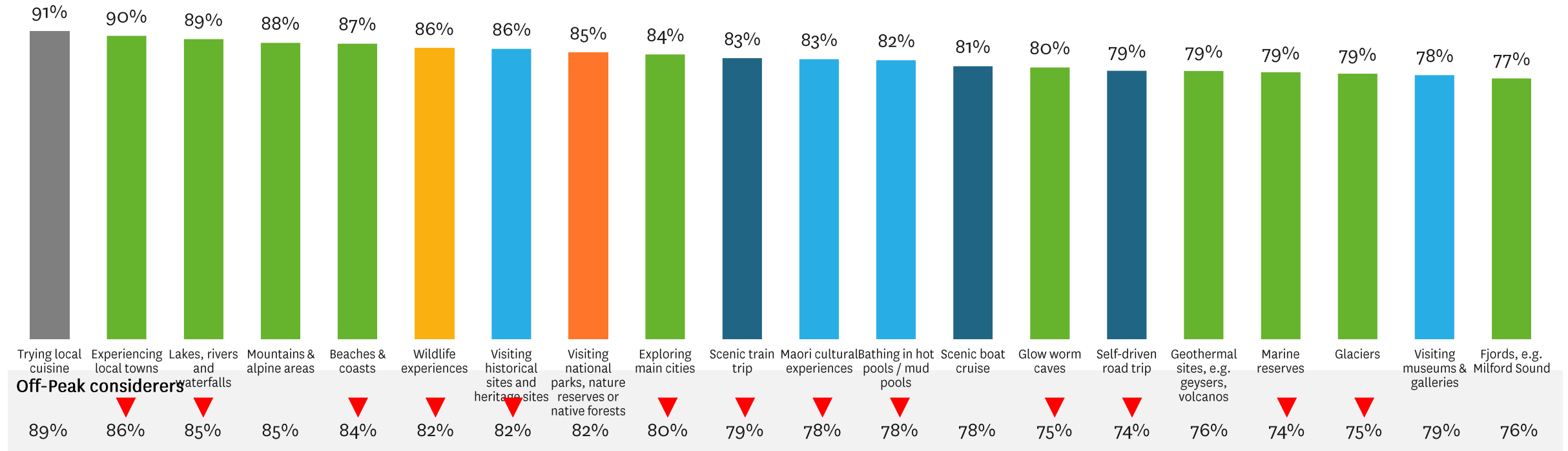
The most common activities of interest are food and scenery related, presenting an opportunity to promote local cuisine and exploration as key holiday experiences; off-peak considerers have softer levels of interest across all activities than ACs as a whole, but interest levels are still high

Activities interested in doing in New Zealand (Top 20)
AC Monitor | Current 5M | Total Active Considerers

Legend: ■ Food & Wine   ■ Arts & Culture   ■ Scenic attractions   ■ Walking & Cycling   ■ Wildlife   ■ Scenic trips   ■ Shopping   ■ Other land sports   ■ Water Sports   ■ High adrenaline

Activity	Top bar %	Off-Peak considerers %
Trying local cuisine	91%	89%
Experiencing local towns	90%	86% ▼
Lakes, rivers and waterfalls	89%	85% ▼
Mountains & alpine areas	88%	85%
Beaches & coasts	87%	84%
Wildlife experiences	86%	82% ▼
Visiting historical sites and heritage sites	86%	82% ▼
Visiting national parks, nature reserves or native forests	85%	82%
Exploring main cities	84%	80% ▼
Scenic train trip	83%	79% ▼
Maori cultural experiences	83%	78% ▼
Bathing in hot pools / mud pools	82%	78% ▼
Scenic boat cruise	81%	78%
Glow worm caves	80%	75% ▼
Self-driven road trip	79%	74% ▼
Geothermal sites, e.g. geysers, volcanos	79%	76%
Marine reserves	79%	74% ▼
Glaciers	79%	75% ▼
Visiting museums & galleries	78%	79%
Fjords, e.g. Milford Sound	77%	76%

1. Sample size: Total ACs n = 300 | Off-Peak Considerers n = 192
2. Question "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"

▲▼ *Significantly higher / lower than Peak-Only Considerers*

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36

4

How can TNZ maximise impact along consumer path to purchase?

Guiding ACs on the ideal times of year for various activities should be a priority as this is a key knowledge gap and provides an opportunity to promote off-peak travel; positively, weather related concerns have reduced

Top ten knowledge gaps
AC Monitor | Current 5M vs. Previous 6M | Total Active Considerers

> Project Koru also found that some of these messages also need to be addressed at the brand level not just the tactical level (planning and booking)
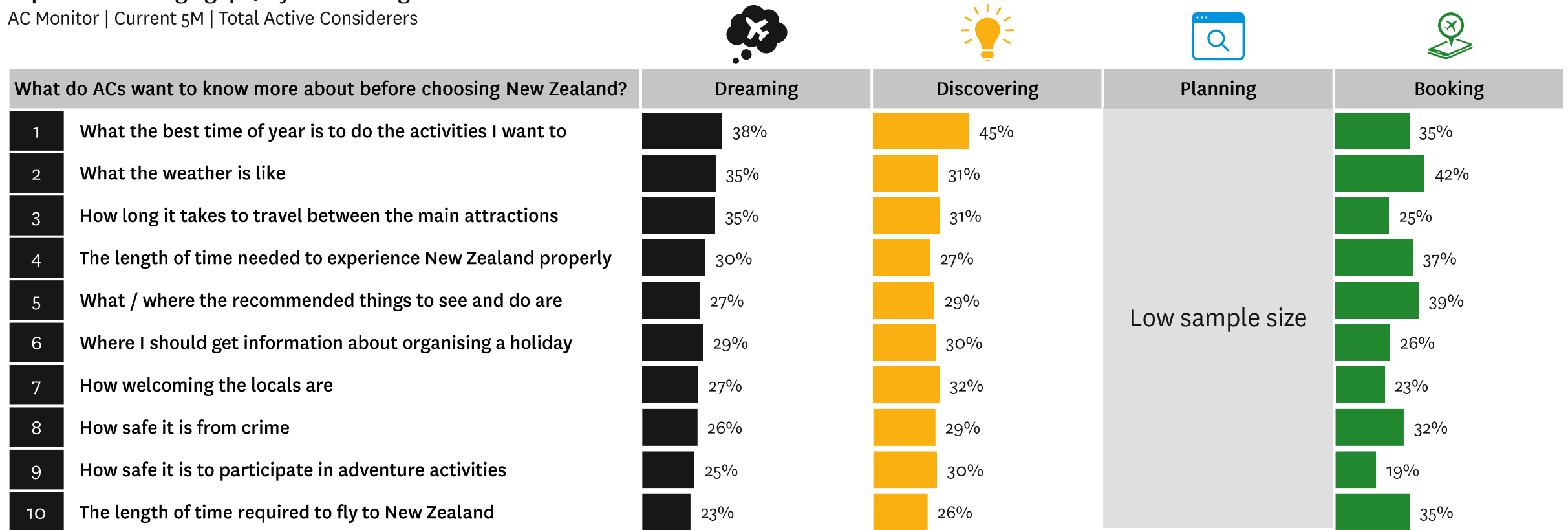
	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	What the best time of year is to do the activities I want to	40%	NA
2	What the weather is like	34% ▼	42%
3	How long it takes to travel between the main attractions	32%	31%
4	The length of time needed to experience New Zealand properly	29%	26%
5	What / where the recommended things to see and do are	29%	29%
6	Where I should get information about organising a holiday	29%	23%
7	How welcoming the locals are	29%	25%
8	How safe it is from crime	28%	27%
9	How safe it is to participate in adventure activities	26%	22%
10	The length of time required to fly to New Zealand	25% ▲	17%

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

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1. Sample size: Current 5M n = 451 | Previous 6M 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?"

100% PURE NEW ZEALAND

Dialling up messaging around the best time of year to certain activities will have the greatest impact on Discoverers, while recommendations things to see and do in New Zealand will help to convert Bookers

Top ten knowledge gaps, by funnel stage
AC Monitor | Current 5M | Total Active Considerers

What do ACs want to know more about before choosing New Zealand?		Dreaming	Discovering	Planning	Booking
1	What the best time of year is to do the activities I want to	38%	45%		35%
2	What the weather is like	35%	31%		42%
3	How long it takes to travel between the main attractions	35%	31%		25%
4	The length of time needed to experience New Zealand properly	30%	27%		37%
5	What / where the recommended things to see and do are	27%	29%		39%
6	Where I should get information about organising a holiday	29%	30%	Low sample size	26%
7	How welcoming the locals are	27%	32%		23%
8	How safe it is from crime	26%	29%		32%
9	How safe it is to participate in adventure activities	25%	30%		19%
10	The length of time required to fly to New Zealand	23%	26%		35%

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

1. Sample size: Dreaming n = 209 | Discovering n = 193 | Planning n = 6 | Booking n = 43
2. Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

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39

Messages that relay the best time of year for certain activities would be most effective among off-peak considerers who show greater appetite for this information; by contrast, messages around safety in adventure activities can be dialled down for this segment

Top ten knowledge gaps for Off Peak Considerers
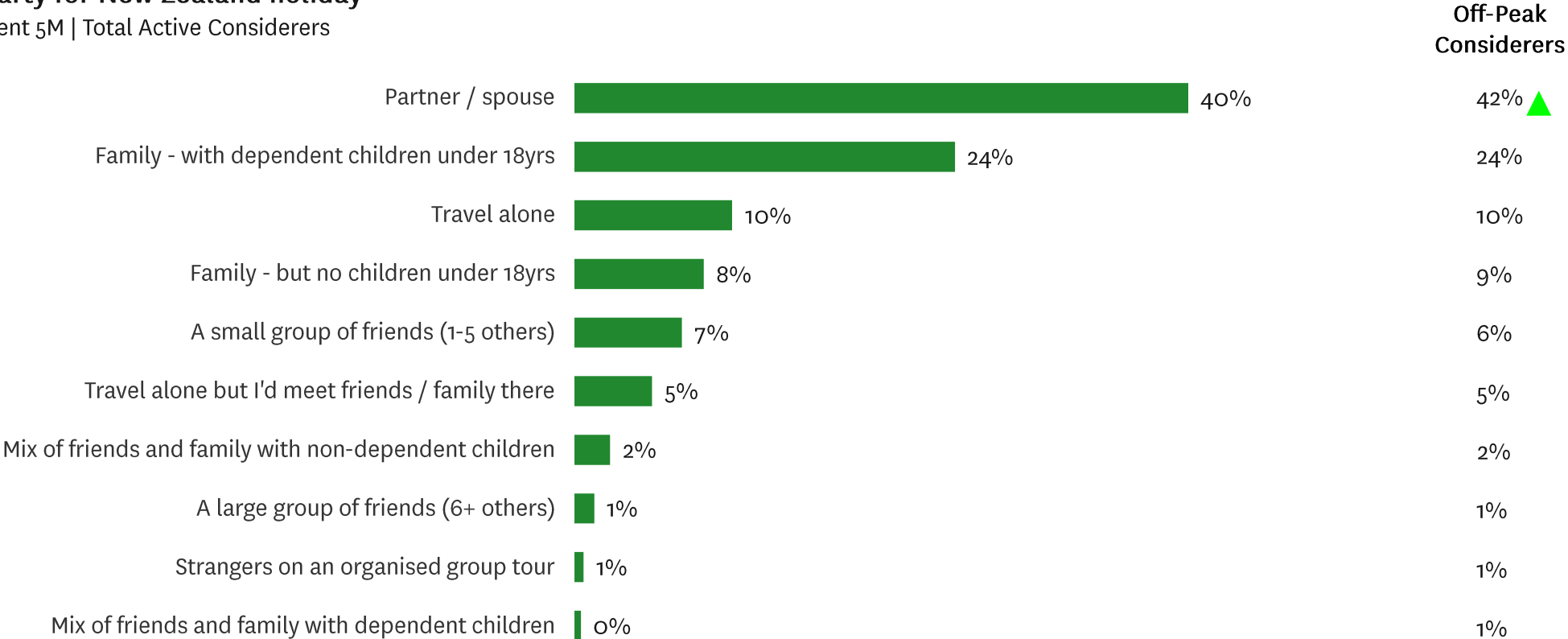AC Monitor | Current 5M | Off-Peak Considerers

	What do ACs want to know more about before choosing New Zealand?	Off-Peak Considerers	Peak-Only Considerers
1	What the best time of year is to do the activities I want to	44% ▲	34%
2	What the weather is like	35%	31%
3	How long it takes to travel between the main attractions	32%	32%
4	The length of time needed to experience New Zealand properly	30%	28%
5	What / where the recommended things to see and do are	28%	30%
6	Where I should get information about organising a holiday	30%	27%
7	How welcoming the locals are	26%	32%
8	How safe it is from crime	28%	29%
9	How safe it is to participate in adventure activities	23% ▼	32%
10	The length of time required to fly to New Zealand	20% ▼	35%

▲▼ *Significantly higher / lower than Peak-Only Considerers*

KANTAR

1. Sample size: Off-Peak Considerers n = 297 | Peak-Only Considerers n = 154
2. Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

40

Australian ACs are most likely to travel to New Zealand with their spouse / partner followed by travelling as a family group

Likely travel party for New Zealand holiday
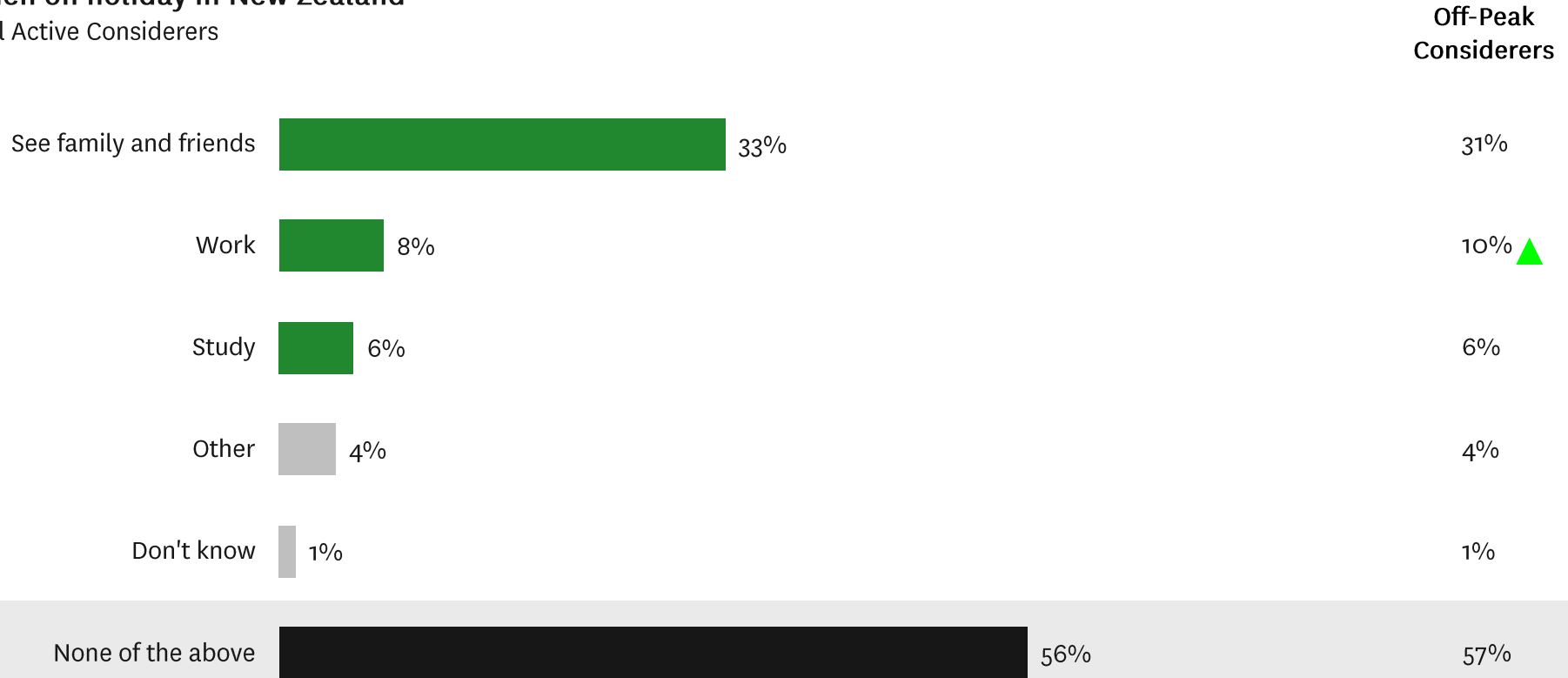AC Monitor | Current 5M | Total Active Considerers

Off-Peak Considerers

Travel party	%	Off-Peak Considerers
Partner / spouse	40%	42% ▲
Family - with dependent children under 18yrs	24%	24%
Travel alone	10%	10%
Family - but no children under 18yrs	8%	9%
A small group of friends (1-5 others)	7%	6%
Travel alone but I'd meet friends / family there	5%	5%
Mix of friends and family with non-dependent children	2%	2%
A large group of friends (6+ others)	1%	1%
Strangers on an organised group tour	1%	1%
Mix of friends and family with dependent children	0%	1%

▲▼ *Significantly higher / lower than Peak-Only Considerers*

1. Sample size: Total ACs n = 751 | Off-Peak Considerers n = 489
2. Question "Who are you most likely to travel with on your trip to New Zealand?"

Over half of the AC pool intend to visit New Zealand for a holiday only, while 33% would look to visit family and friends; off-peak considerers are more likely to work during their holiday

Additional intentions when on holiday in New Zealand
AC Monitor | Current 5M | Total Active Considerers

Off-Peak Considerers

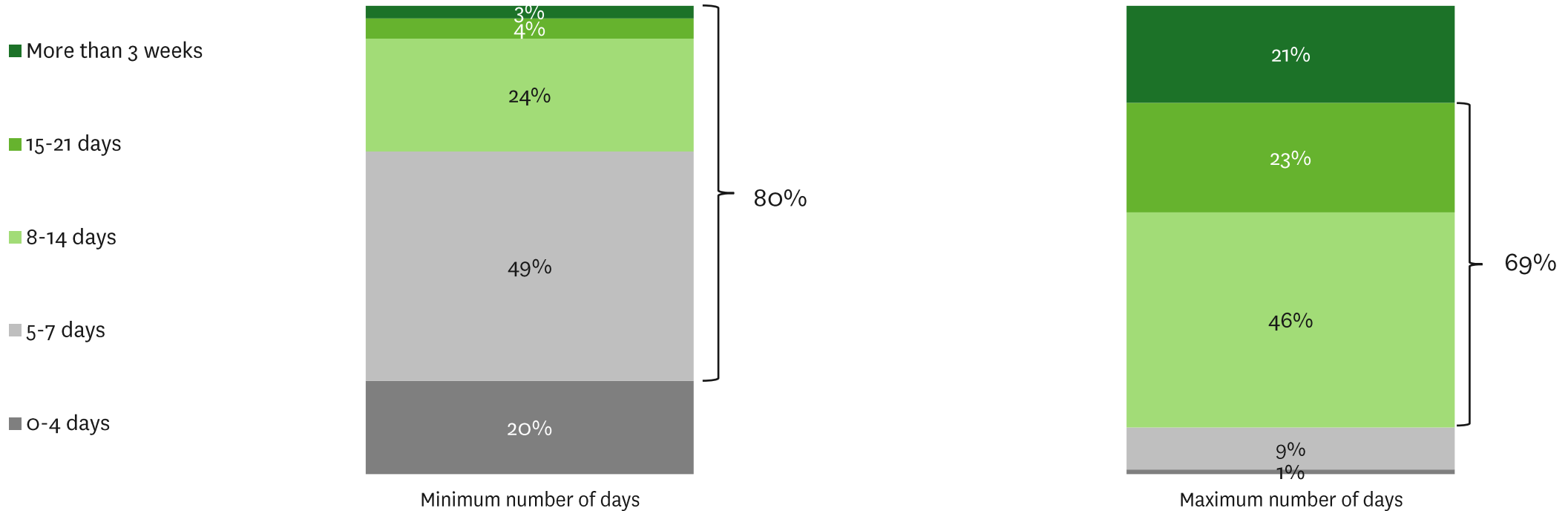| Category	Total	Off-Peak Considerers
See family and friends	33%	31%
Work	8%	10% ▲
Study	6%	6%
Other	4%	4%
Don't know	1%	1%
None of the above	56%	57%

This represents ACs who are considering travelling to New Zealand for a holiday ONLY

▲▼ *Significantly higher / lower than Peak-Only Considerers*

KANTAR

100% PURE NEW ZEALAND

The vast majority of ACs would spend a minimum of 5 – 7 days in New Zealand and a maximum of 8 – 21 days

Ideal minimum and maximum numbers of days spent on holiday in New Zealand
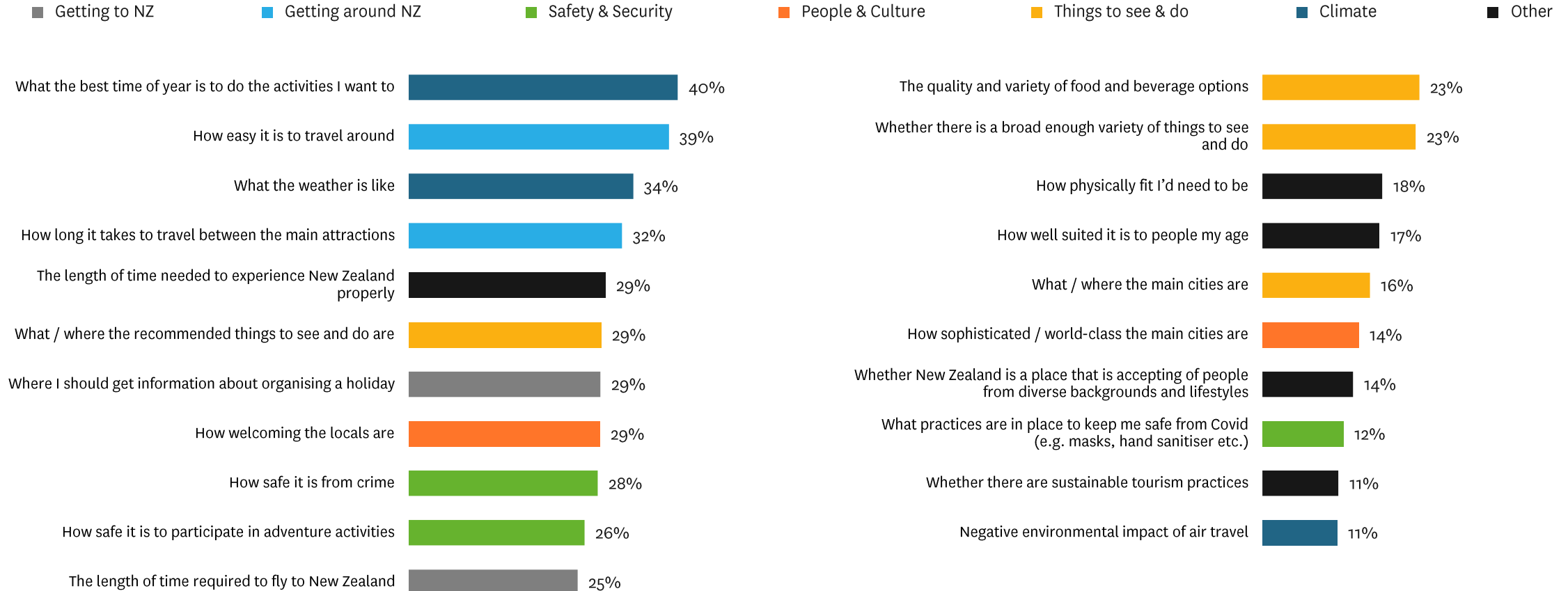AC Monitor | Current 5M | Total Active Considerers

Legend:
- ■ More than 3 weeks
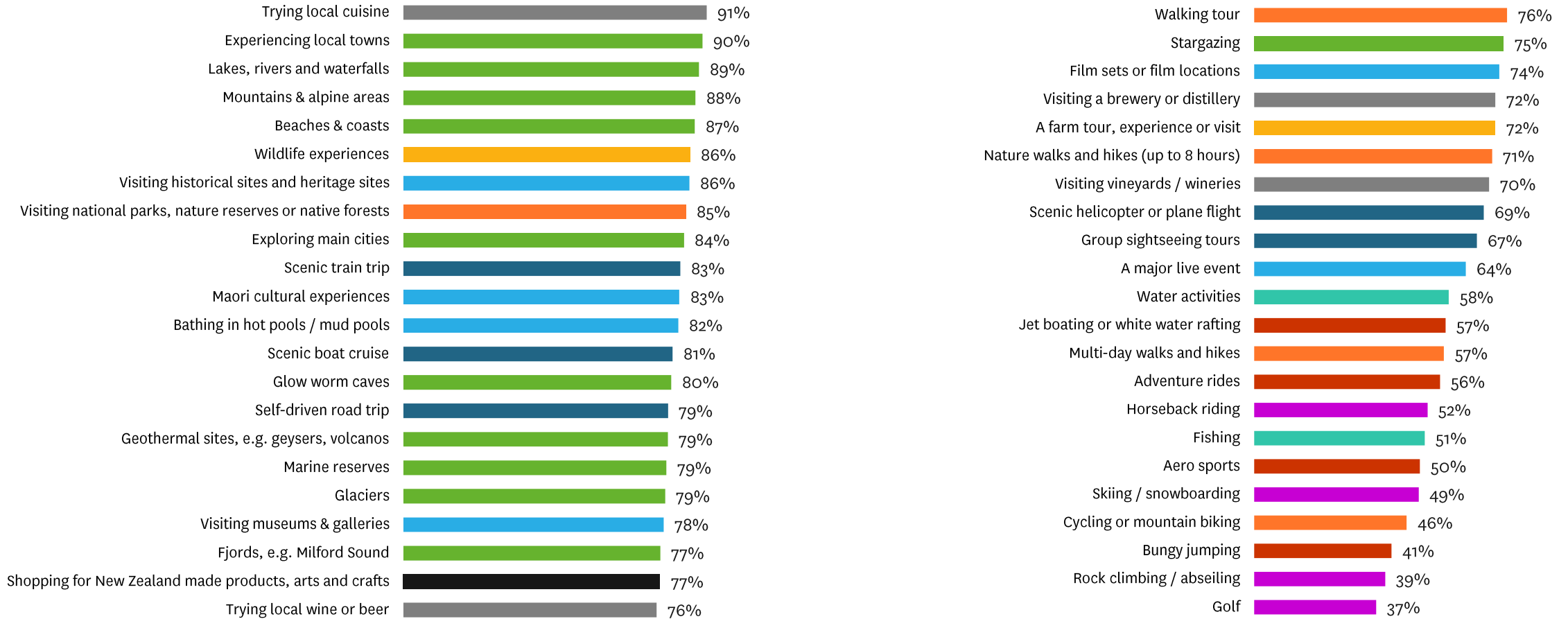- ■ 15-21 days
- ■ 8-14 days
- ■ 5-7 days
- ■ 0-4 days

Minimum number of days:
- 3%
- 4%
- 24%
- 49%
- 20%

80%

Maximum number of days:
- 21%
- 23%
- 46%
- 9%
- 1%

69%

5 | Appendix

Knowledge gaps (full list)

AC Monitor | Current 5M | Total Active Considerers

Legend: ■ Getting to NZ ■ Getting around NZ ■ Safety & Security ■ People & Culture ■ Things to see & do ■ Climate ■ Other

Item	%
What the best time of year is to do the activities I want to	40%
How easy it is to travel around	39%
What the weather is like	34%
How long it takes to travel between the main attractions	32%
The length of time needed to experience New Zealand properly	29%
What / where the recommended things to see and do are	29%
Where I should get information about organising a holiday	29%
How welcoming the locals are	29%
How safe it is from crime	28%
How safe it is to participate in adventure activities	26%
The length of time required to fly to New Zealand	25%

Item	%
The quality and variety of food and beverage options	23%
Whether there is a broad enough variety of things to see and do	23%
How physically fit I'd need to be	18%
How well suited it is to people my age	17%
What / where the main cities are	16%
How sophisticated / world-class the main cities are	14%
Whether New Zealand is a place that is accepting of people from diverse backgrounds and lifestyles	14%
What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	12%
Whether there are sustainable tourism practices	11%
Negative environmental impact of air travel	11%

1. Sample size: Total ACs n = 451
2. Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

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100% PURE NEW ZEALAND

50

Activities interested in doing in New Zealand (full list)

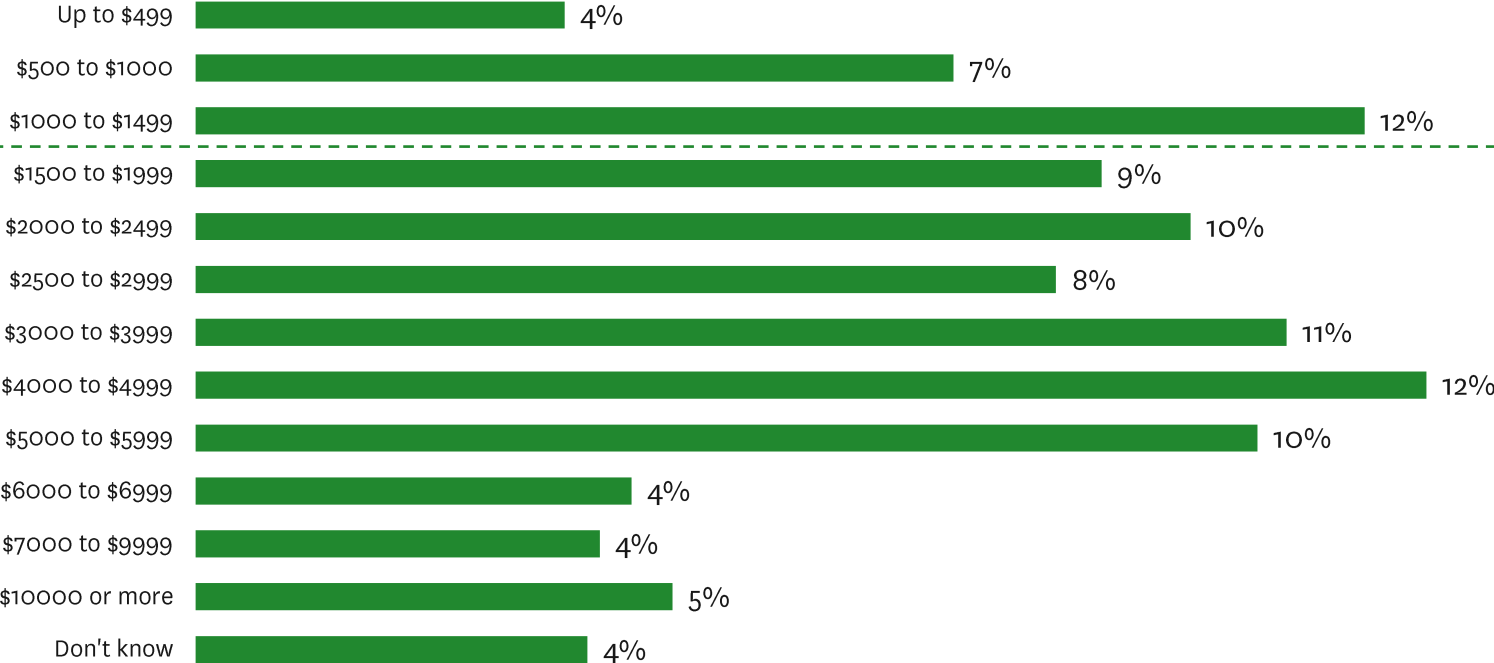AC Monitor | Current 5M | Total Active Considerers

Legend: ■ Food & Wine ■ Arts & Culture ■ Scenic attractions ■ Walking & Cycling ■ Wildlife ■ Scenic trips ■ Shopping ■ Other land sports ■ Water Sports ■ High adrenaline

Activity	%
Trying local cuisine	91%
Experiencing local towns	90%
Lakes, rivers and waterfalls	89%
Mountains & alpine areas	88%
Beaches & coasts	87%
Wildlife experiences	86%
Visiting historical sites and heritage sites	86%
Visiting national parks, nature reserves or native forests	85%
Exploring main cities	84%
Scenic train trip	83%
Maori cultural experiences	83%
Bathing in hot pools / mud pools	82%
Scenic boat cruise	81%
Glow worm caves	80%
Self-driven road trip	79%
Geothermal sites, e.g. geysers, volcanos	79%
Marine reserves	79%
Glaciers	79%
Visiting museums & galleries	78%
Fjords, e.g. Milford Sound	77%
Shopping for New Zealand made products, arts and crafts	77%
Trying local wine or beer	76%

Activity	%
Walking tour	76%
Stargazing	75%
Film sets or film locations	74%
Visiting a brewery or distillery	72%
A farm tour, experience or visit	72%
Nature walks and hikes (up to 8 hours)	71%
Visiting vineyards / wineries	70%
Scenic helicopter or plane flight	69%
Group sightseeing tours	67%
A major live event	64%
Water activities	58%
Jet boating or white water rafting	57%
Multi-day walks and hikes	57%
Adventure rides	56%
Horseback riding	52%
Fishing	51%
Aero sports	50%
Skiing / snowboarding	49%
Cycling or mountain biking	46%
Bungy jumping	41%
Rock climbing / abseiling	39%
Golf	37%

1. Sample size: Total ACs n = 300
2. Question "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"

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100% PURE NEW ZEALAND

51

Of those who agree that New Zealand is a preferred destination, 23% do not meet the spend threshold of $1500AU

Spend on holiday in New Zealand

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

Category	%
Up to $499	4%
$500 to $1000	7%
$1000 to $1499	12%
$1500 to $1999	9%
$2000 to $2499	10%
$2500 to $2999	8%
$3000 to $3999	11%
$4000 to $4999	12%
$5000 to $5999	10%
$6000 to $6999	4%
$7000 to $9999	4%
$10000 or more	5%
Don't know	4%

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1. Sample size: n = 1059
2. Question "On a per person basis, how much would you be willing to spend on a holiday to New Zealand? Please include accommodation and daily expenses"

100% PURE NEW ZEALAND

NEW ZEALAND TOURISM

52

57% of ACs would be willing to spend between $2500 and $6000AU on a holiday in New Zealand

Spend on holiday in New Zealand among ACs
AC Monitor | Current 5M | Total Active Considerers

	Total Active Considerers	Off-Peak Considerers
$1500 to $1999	12%	13%
$2000 to $2499	13%	13%
$2500 to $2999	11%	12%
$3000 to $3999	15%	14%
$4000 to $4999	17%	17%
$5000 to $5999	14%	14%
$6000 to $6999	6%	7%
$7000 to $9999	5%	5%
$10000 or more	6%	6%

▲▼ *Significantly higher / lower than Peak-Only Considerers*

KANTAR

100% PURE NEW ZEALAND
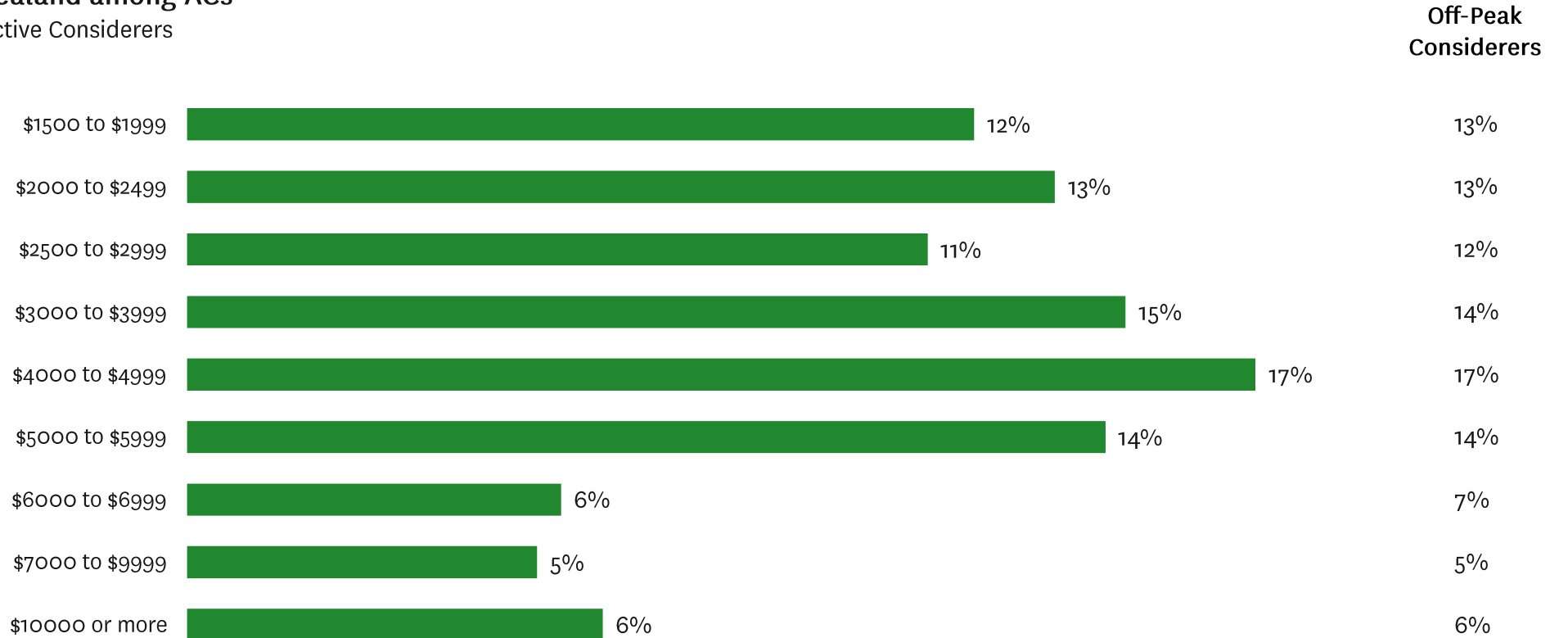
There are no significant demographic differences seen between those who find New Zealand appealing versus those who do not find it appealing

Profile of those who find New Zealand highly appealing
AC Monitor | Current 5M | Those who find New Zealand highly appealing vs. not

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

By age segment
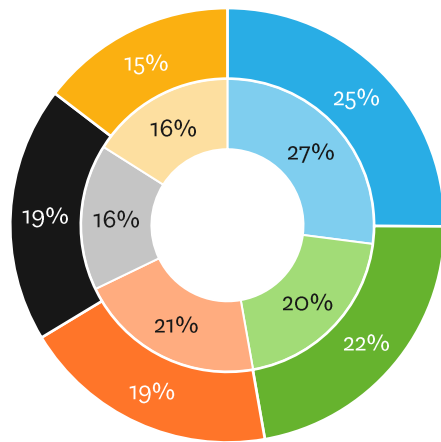
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years
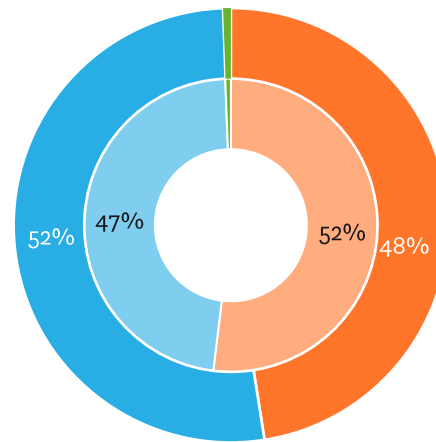
By gender

- Male
- Female
- Gender diverse

By region

- NSW
- VIC
- QLD
- Rest of Australia
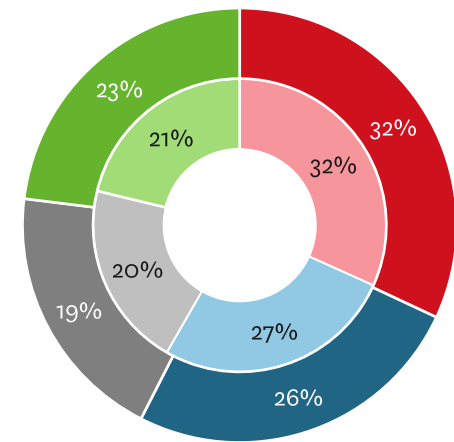
▲▼ *Significantly higher / lower than those who do not find New Zealand appealing*

1. Sample size: Those who find New Zealand appealing n = 1916 | Those who do not find New Zealand appealing n = 1367

The demographic profile of those who would consider visiting New Zealand is similar to those who would not

Profile of those who would seriously consider visiting New Zealand
AC Monitor | Current 5M | Those who find New Zealand highly appealing

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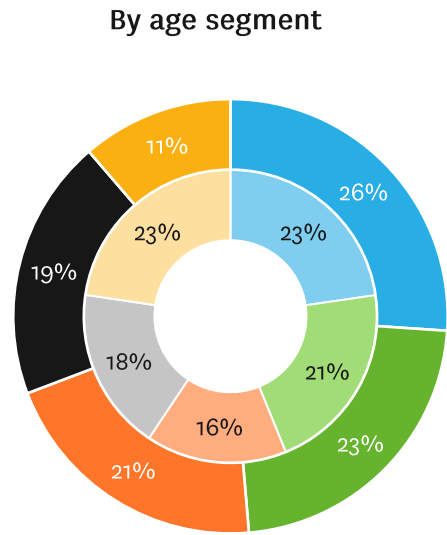
By age segment

26%
23%
21%
23%
16%
21%
18%
19%
23%
11%

■ 18 - 29 years
■ 30 - 39 years
■ 40 - 49 years
■ 50 - 59 years
■ 60 - 74 years

By gender

47%
48%
52%
52%

■ Male
■ Female
■ Gender diverse

By region

33%
29%
25%
26%
20%
19%
26%
22%

■ NSW
■ VIC
■ QLD
■ Rest of Australia
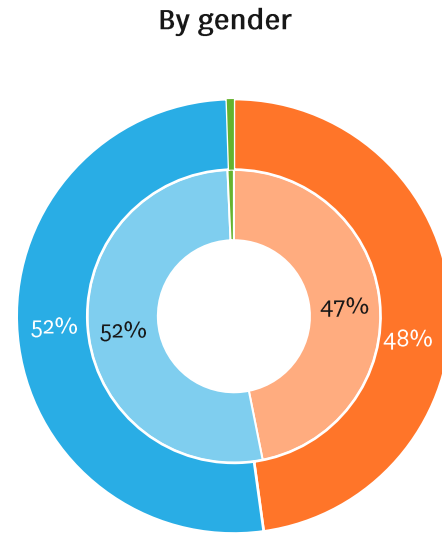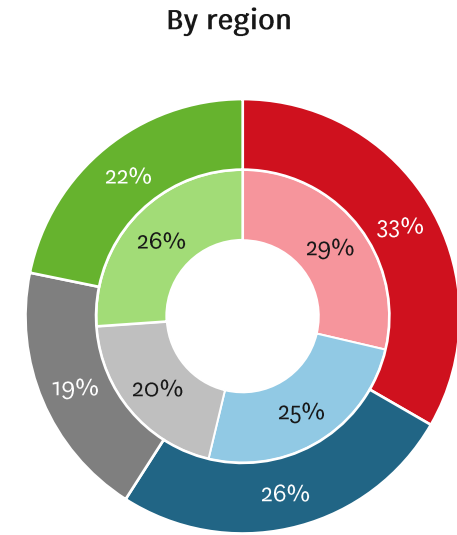
▲▼ *Significantly higher / lower than those who would not seriously consider*

1. Sample size: Those who would seriously consider visiting New Zealand n = 1281 | Those who would not seriously consider visiting New Zealand n = 635

More than half of ACs have an annual household income of over $90,000 AU

Household Income
AC Monitor | Current 5M | Total Active Considerers

Income bracket	Percentage
Less than AUD $30,000	6%
AUD $30,000 – AUD $49,999	8%
AUD $50,000 – AUD $69,999	12%
AUD $70,000 – AUD $89,999	12%
AUD $90,000 – AUD $109,999	16%
AUD $110,000 – AUD $139,999	16%
AUD $140,000 – AUD $159,999	10%
AUD $160,000 or more	17%
Prefer not to say	3%

58% (AUD $90,000 – AUD $160,000 or more)

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100% PURE NEW ZEALAND
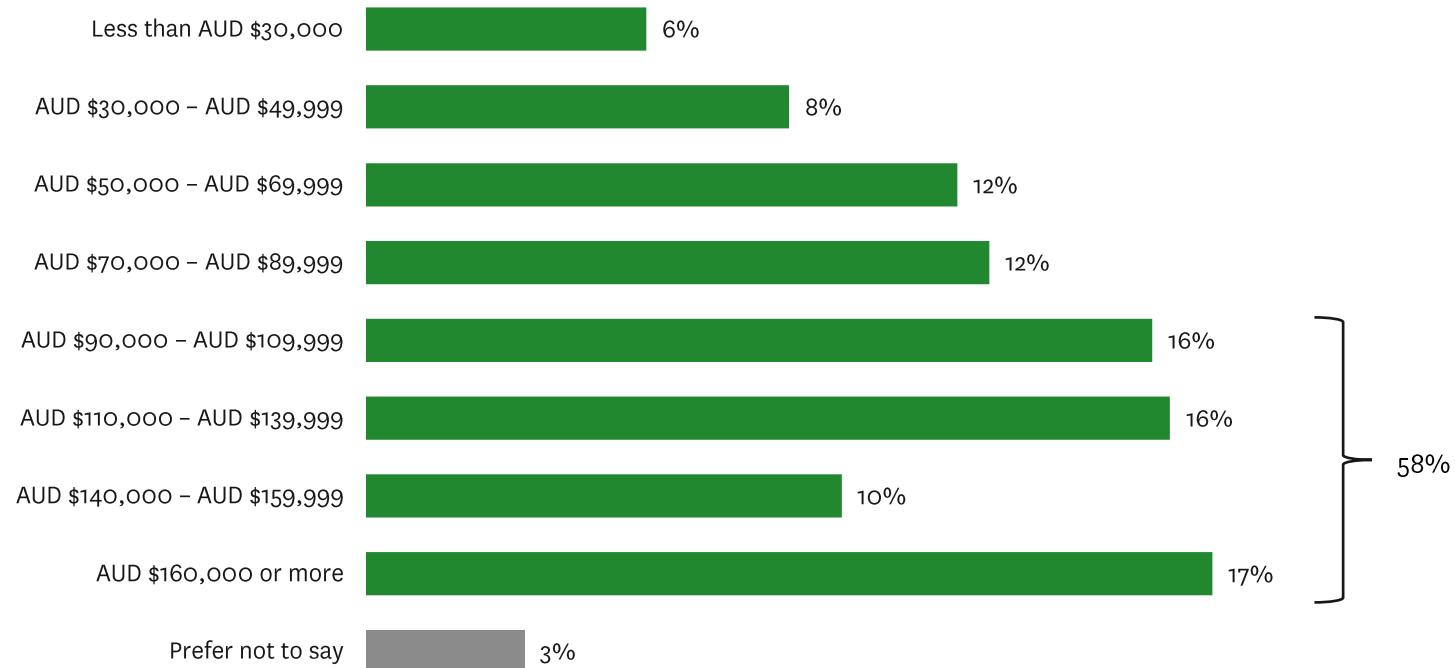
Out of an online population of approximately 17.5 million people, 4.6 million are classified as ACs

Nov 24 | Million people

Market size, based on the AC incidence rate for the five months to November 2024

Online population

(The population from which the size of the AC pool is calculated)

27.1	8.0	19.1	1.6	17.5	12.9	4.6
Total population (1) of Australia	<18yrs or 74yrs>	Population (1) 18-74	Don't use internet	Internet users (1)(2)(3) 18-74	Not ACs	Active Considerers (1)(2)(3)(4)(5)

As of Dec23:

26.6		18.8		17.2		3.9
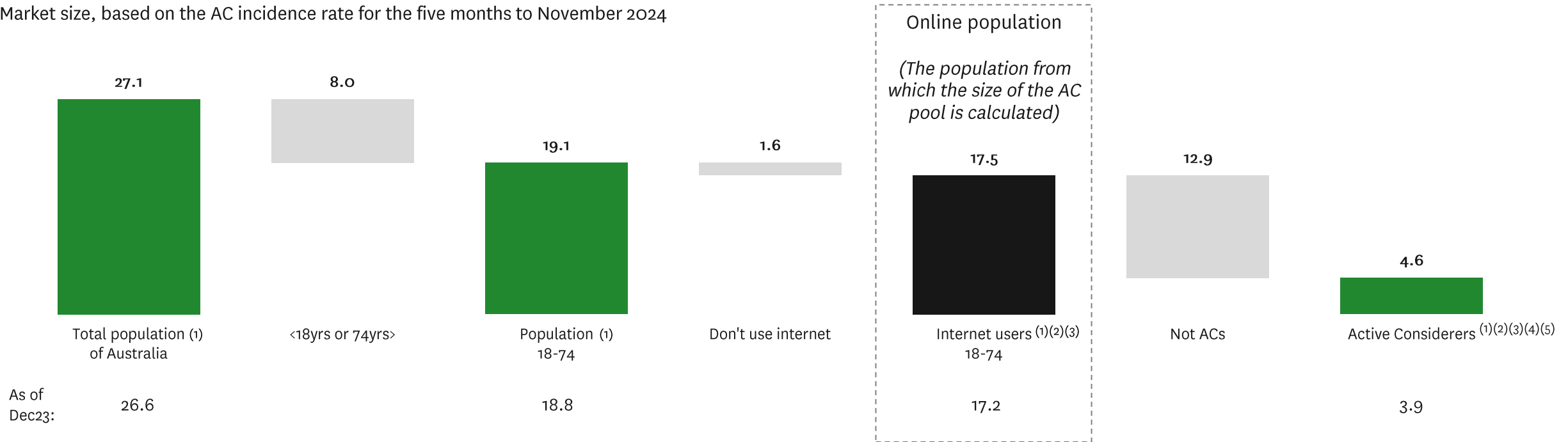
SOURCES/NOTES:
(1)   Australian Bureau of Statistics, Australian Demographic Statistics, Table 8 Estimated resident population, by age and sex; Time period: 30 June 2024; Coverage: All Australian residents
(2)   Australian Bureau of Statistics, Population clock; Time period as at 30 June 2024
(3)   Kantar Population Profiler, Internet usage by age; Time period: 2024
(4)   Tourism New Zealand, Active Considerer Monitor Australia; Time period: Jul-Nov 2024, under the latest AC definition
(5)   Kantar Analysis

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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
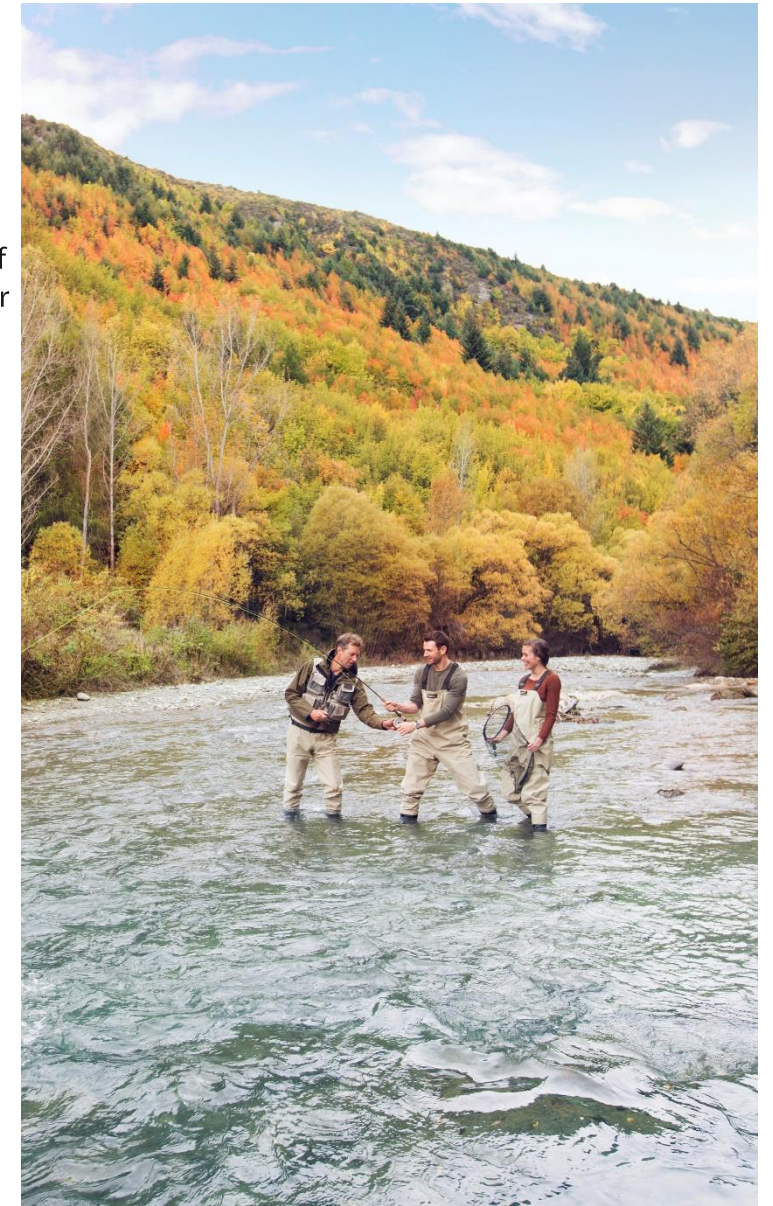
Appendix: Brand attribute wording

We ask ACs which of their preferred destinations they associate with a number of statements, including the following core attributes:

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
Exciting to visit	Thinking about visiting makes me feel really excited
Clean & unpolluted	The environment there is clean and unpolluted
Beaches	Has amazing beaches and coastlines
Easy to travel around	It's easy to travel around to see and do things
Family friendly	Ideal for a family holiday
Friendly people	The locals are friendly and welcoming to all visitors
Fun & enjoyment	Ideal for having fun and enjoying yourself
Iconic attractions	Has iconic attractions and landmarks
Wildlife experiences	Has amazing wildlife experiences

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
Escape normal life	A place you can escape from the ordinary
Quality food & wine	Offers quality local food and wine experiences
Range of adventure	Offers a wide range of outdoor and 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
Indigenous culture	Has a unique indigenous culture

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