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Active Considerer (AC) Monitor China and Japan (H1 FY25)

Report

January 2025

NEW ZEALAND TOURISM

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newzealand.com

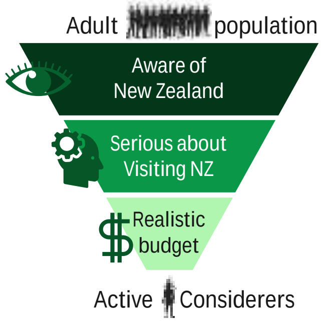
AC Monitor research specifications

Kantar conducts a **monthly online survey** in each of Tourism New Zealand's six tier 1 & 2 markets:

- Australia, China, Germany, Japan, UK and USA; 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



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

Performance Dashboard

	Q4 FY24	Q2 FY25
Incidence of Active Considerers[1]	62%	58%
Preference KPI[2] (total)	79%	81%
First	65%	65%
Second	14%	16%
Funnel[2] – Dreaming	64%	66%
Discover	NA	15%
Planning	7%	0%
Booking	30%	19%

Brand areas to focus on[2]

Strengths	Need to dial up
Relax & refresh	Iconic attractions
Range of experiences	Relationship with the land
Range of adventure	All seasons
Escape the ordinary	Affordable activities

Top 5 competitors[2]

(% selected destination in their top five preferred destinations)

Singapore	Australia	France	Hawaii	Hong Kong
36%	32%	29%	28%	28%

Top 5 knowledge gaps[3]

1. How safe it is from crime
2. How easy it is to travel around
3. What the weather is like
4. What the best time of year is to do the activities I want to
5. How long it takes to travel between the main attractions

Off-Peak Consideration[2]

84%

	Consideration	Preference
Spring	34%	23%
Summer	30%	19%
Autumn	44%	31%
Winter	31%	22%

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1. Sample size: Online population Q4 FY24 (6M) n = 1649 | Q2 FY25 (5M) n = 1699
2. Sample size: ACs Q4 FY24 (6M) n = 901 | Q2 FY25 (5M) n = 754
3. Sample size: ACs Q2 FY25 (5M) n = 450

Significantly higher / lower than previous period

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Performance Dashboard

	Q4 FY24	Q2 FY25
Incidence of Active Considerers[1]	7%	5% ▼
Preference KPI[2]	73%	66% ▼
First	52%	45% ▼
Second	22%	21%
Funnel[2]		
Dreaming	33%	35%
Discover	NA	33%
Planning	19%	4%
Booking	48%	27%

Brand areas to focus on[2]

Strengths	Need to dial up
Landscapes & scenery	Friendly people
Indigenous culture	All seasons
Unique experiences	Iconic attractions
Wildlife experiences	Fun & enjoyment

Top 5 competitors[2]

(% selected destination in their top five preferred destinations)

Australia	Hawaii	Italy	Taiwan	Canada
48%	39%	26%	25%	22%

Top 5 knowledge gaps[3]

1. How safe it is from crime
2. What the weather is like
3. How welcoming the locals are
4. The quality and variety of food and beverage options
5. What / where the recommended things to see and do are

Off-Peak Consideration[2]

68%

	Consideration	Preference
Spring	32%	23%
Summer	42%	36%
Autumn	35%	23%
Winter	18%	13%

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1. Sample size: Online population Q4 FY24 (6M) n = 16686 | Q2 FY25 (5M) n = 25822
2. Sample size: ACs Q4 FY24 (6M) n = 900 | Q2 FY25 (5M) n = 750
3. Sample size: ACs Q2 FY25 (5M) n = 450

▲▼ *Significantly higher / lower than previous period*

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CHINA

1 What is the size of opportunity in China?

Active Considerer Funnel – China

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 ¥12,500 CNY per person) to New Zealand

Online population, 18-74 years of age, in target cities[1]

106.6m

85%

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

90.6m

82%

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

74.2m

99%

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

73.2m

85%

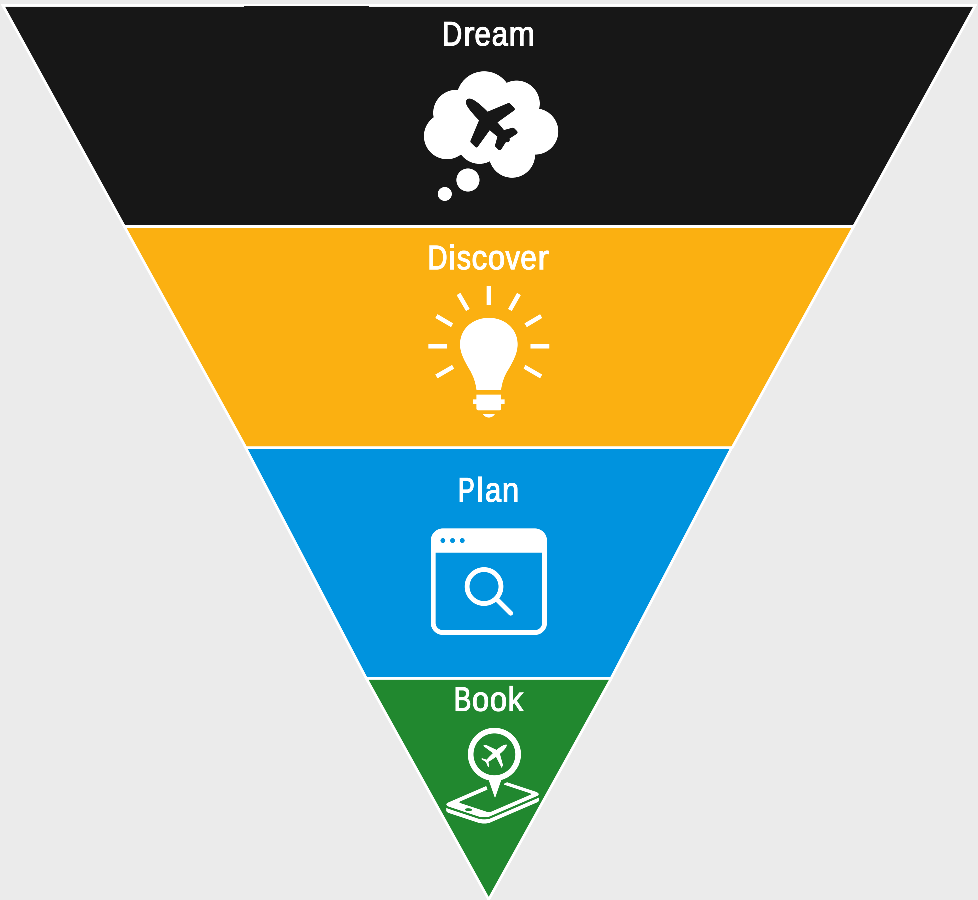
Willing to spend at least ¥12,500 CNY per person on a holiday to New Zealand[2]

62.1m

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

Journey funnel to New Zealand – China

*The addition of 'Discover' into our Brand Tracking commenced in July 2024 (at the start of FY25). We are still calibrating and reviewing this question.



Book to come to NZ
Moment of Truth

	Active Considerers (62.1m)	Size (%) Q2 FY25	Size (%) Q4 FY24
Dream	41.2m	66%	*64%*
Discover	9.2m	15%	*NA*
Plan	0.2m	0%	*7%*
Book	11.5m	19%	*30%*

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

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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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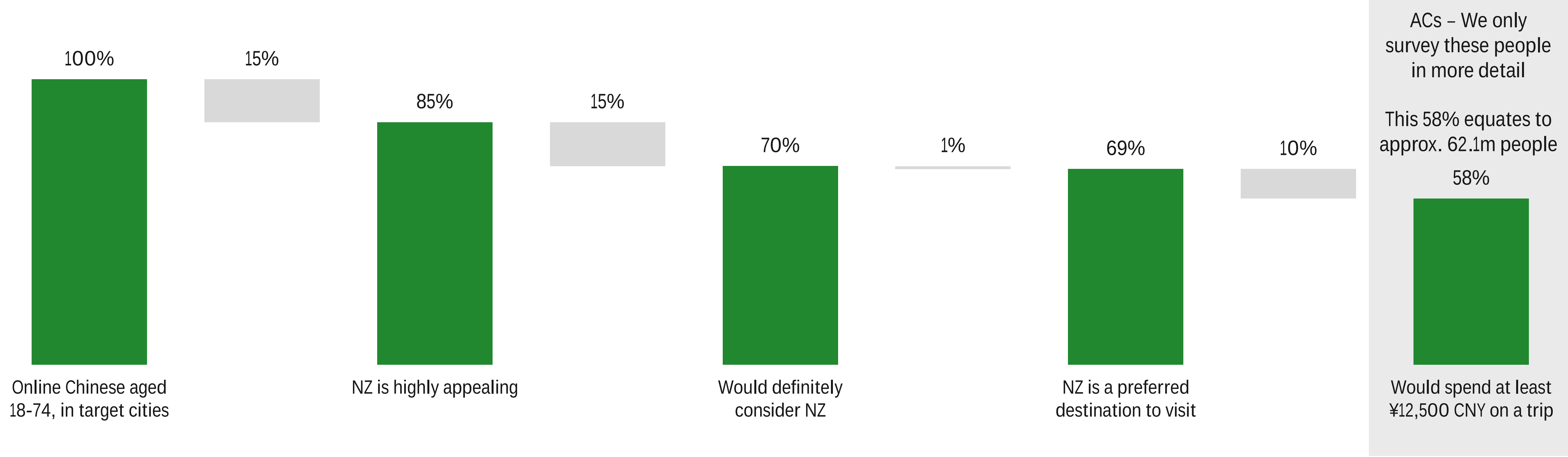
The AC incidence in China remains high and stable at 58%, equating to an AC pool of 62.1 million people

Qualifying criteria for defining ACs

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



Previous 6M								
100%	16%	84%	14%	70%	1%	69%	7%	62%

▲▼ *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 = 1699 | Q4 FY24 n = 1649

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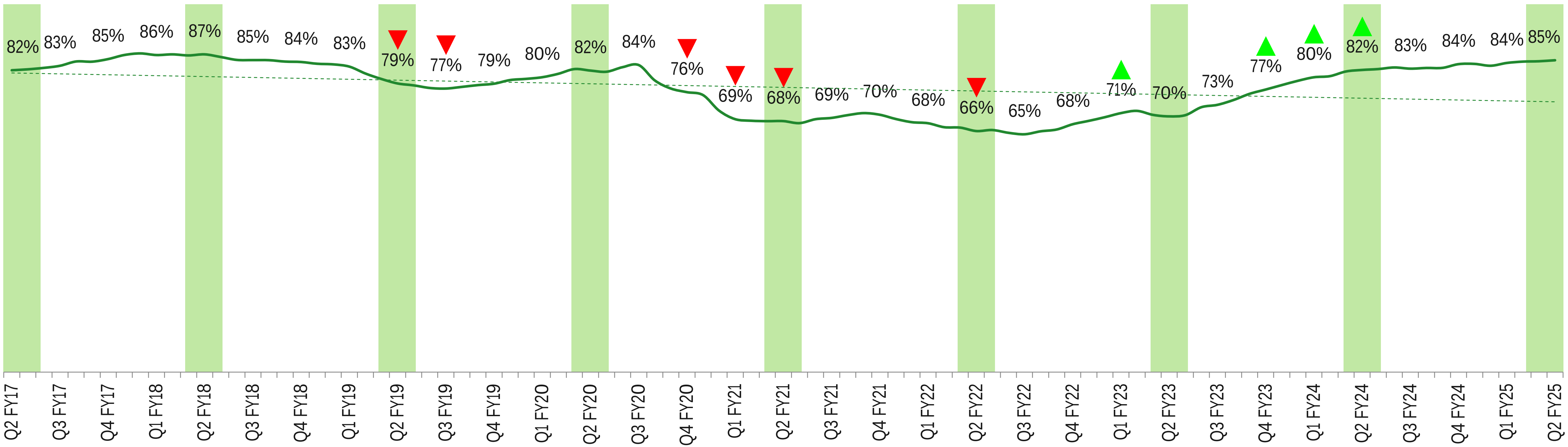
Appeal for New Zealand is now at peak levels after significant growth

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%*

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1. Sample size: Q2 FY17 – Q2 FY25 (6MRA) minimum n = 1338 | maximum n = 3029
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

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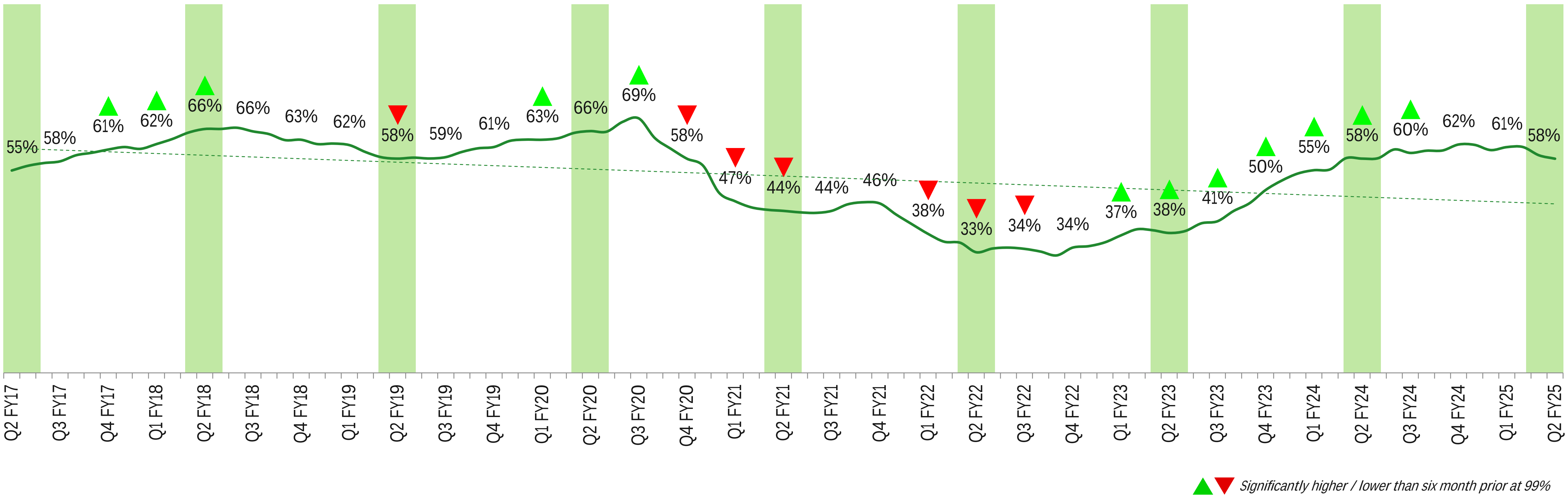
Following a period of significant growth, the AC incidence in China has settled at a strong 58%

Incidence of ACs

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



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1. Sample size: Q2 FY17 – Q2 FY25 (6MRA) minimum n = 1338 | maximum n = 3029
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 CNY while holidaying in New Zealand

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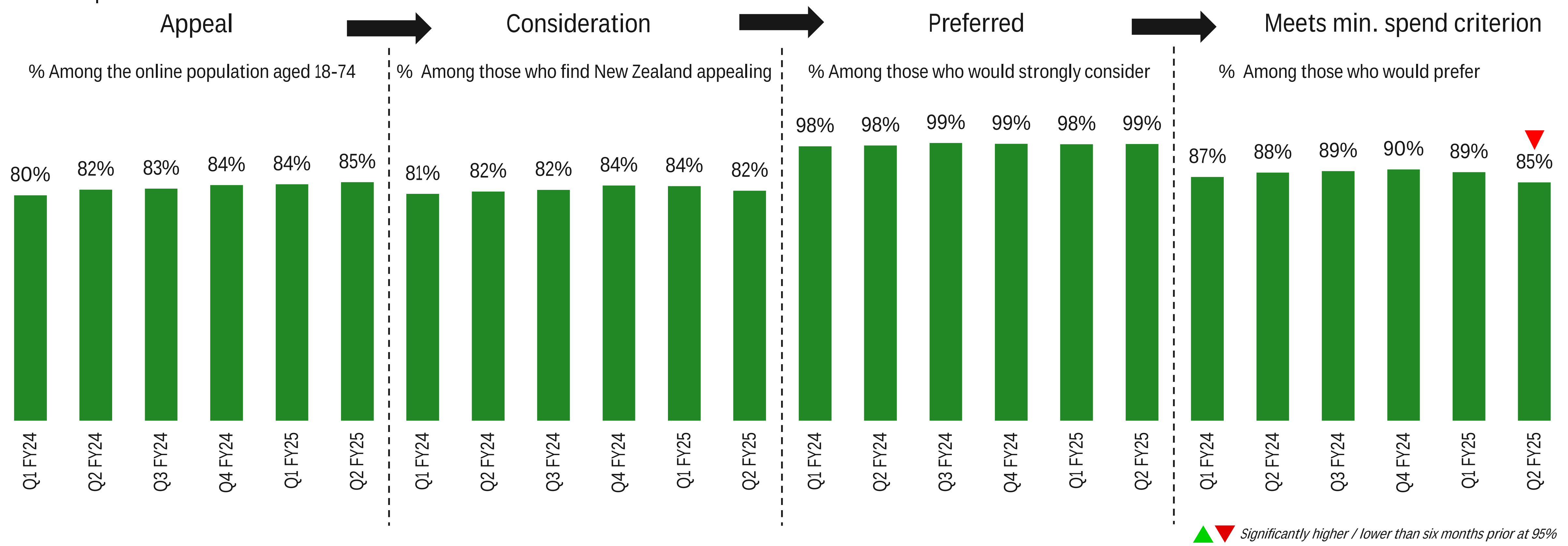
Despite a recent dip in those who meet the spend threshold, the conversion funnel and overall AC incidence remains stable

Conversion of ACs through the Consideration Funnel
AC Monitor | 6MRA



1. Sample size: Q1 FY24 – Q2 FY25 (6MRA): Appeal n = 2357, 2193, 1626, 1649, 1888, 1699 | Consider n = 1836, 1766, 1304, 1335, 1549, 1420 | Prefer n = 1445, 1414, 1046, 1075, 1264, 1150 | Spend n = 1410, 1383, 1035, 1058, 1240, 1129
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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China's AC pool of 62.1 million presents a significant opportunity for TNZ to increase 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

Source for top 8 markets: AC Monitor | Online population aged 18-74 | Current 5M
Australia n = 3283 | China n = 1699 | USA n = 3994 | UK n = 3940 | Germany n = 5597 | Japan n = 25822 | India n = 2933 | Singapore n = 3555 | South Korea n = 3086 | Canada n = 1352

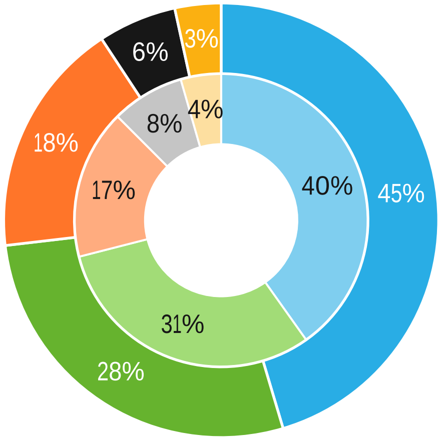
Compared to non-ACs, ACs are less likely to come from Guangzhou & Shenzhen

Profile of Active Considerers

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

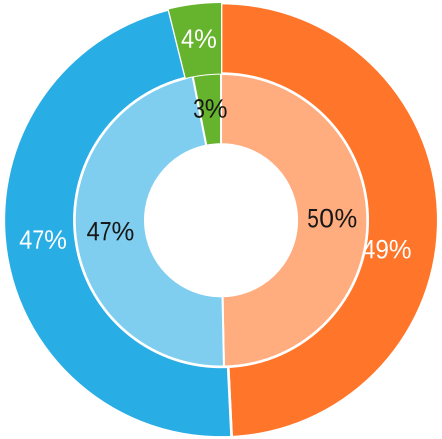
Outer ring: Chinese Active Considerers
Inner ring: Chinese non-Active Considerers

By age segment



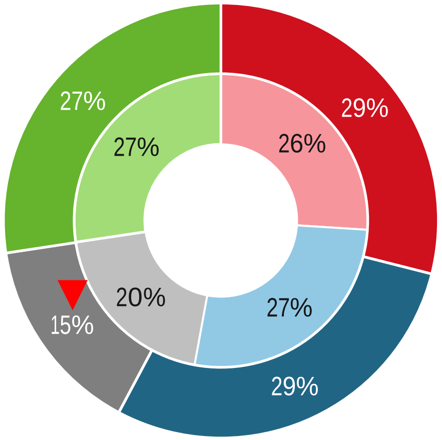
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



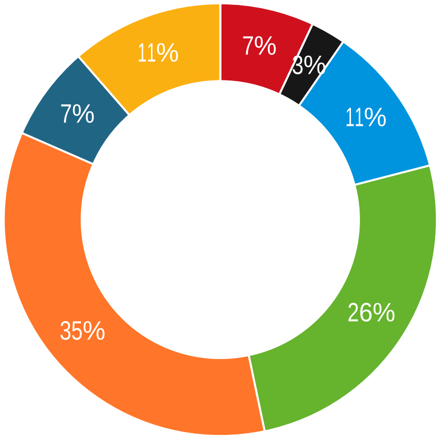
- Male
- Female
- Gender diverse

By region



- Beijing, Shenyang & Tianjin
- Changsha, Chengdu, Xian, Wuhan & Chongqing
- Guangzhou & Shenzhen
- Shanghai, Nanjing & Hangzhou

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

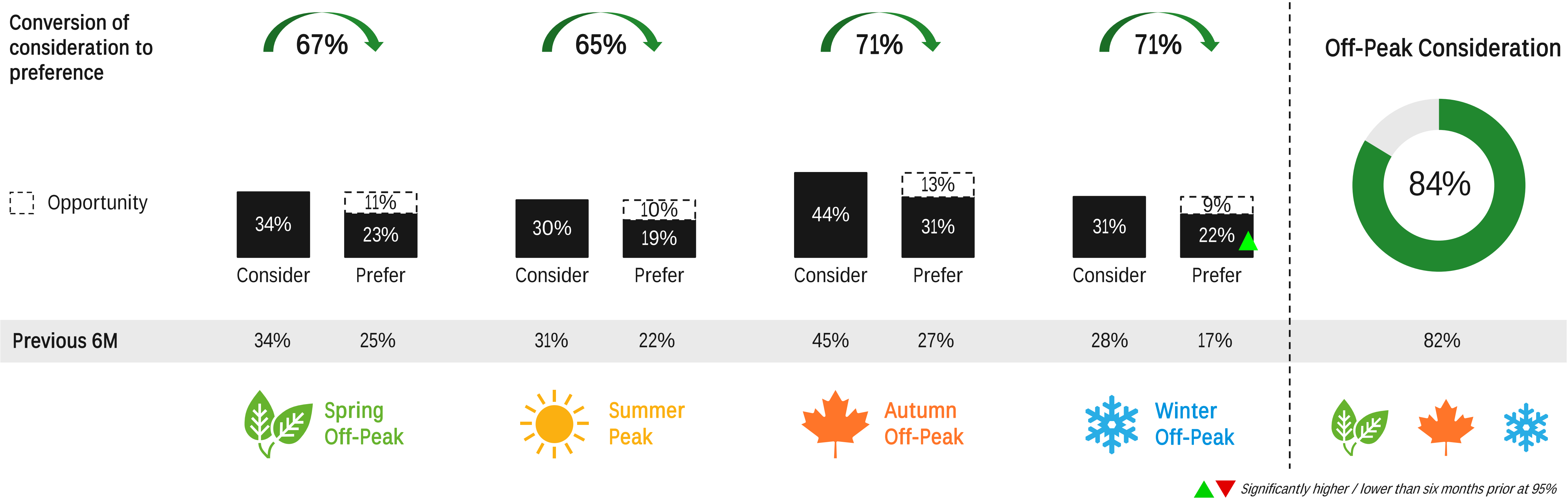
Significantly higher / lower than non-ACs

1. Sample size: ACs n = 905 | non-ACs n = 794

Strong strategic opportunity to drive off-peak arrivals: consideration remains strongest for autumn while preference for winter has recently increased

Seasons – Consideration & Preference

AC Monitor | Current 5M | Total Active Considerers

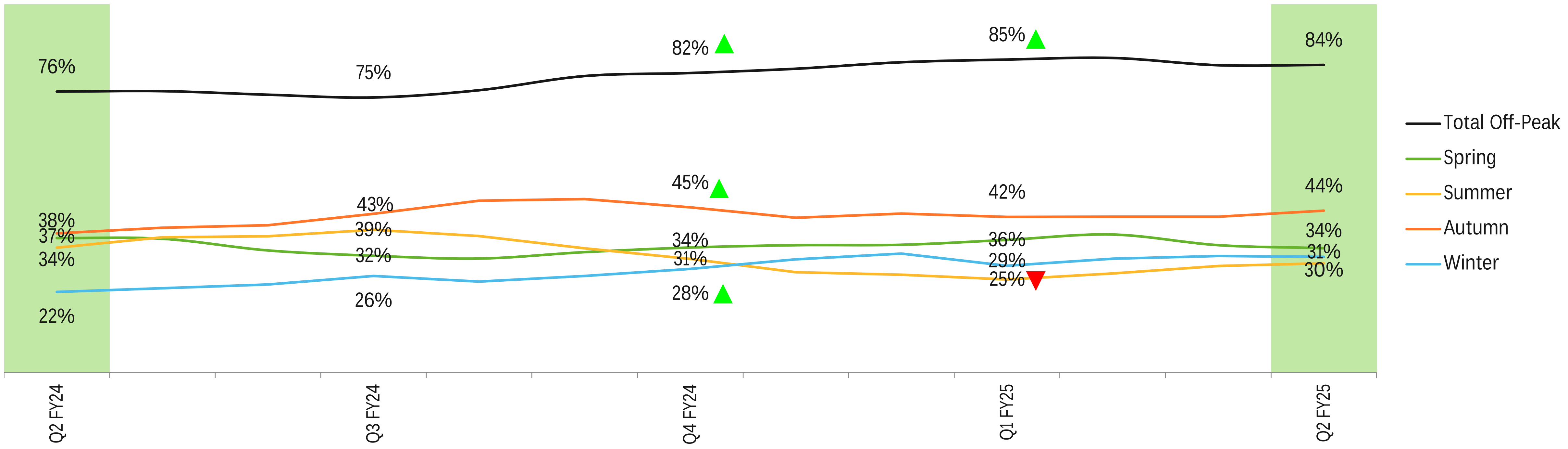


1. Sample size: Current 5M n = 754 | Previous 6 months n = 901
2. Question: "At what time(s) of year would you consider visiting New Zealand?" When would you prefer to visit New Zealand?"
3. Spring = Sep, Oct, Nov | Summer = Dec, Jan, Feb | Autumn = Mar, Apr, May | Winter = Jun, Jul, Aug

Growing interest for both winter and autumn over the last year has boosted off-peak consideration levels

Seasonal consideration

AC Monitor | 6MRA | Total Active Considerers

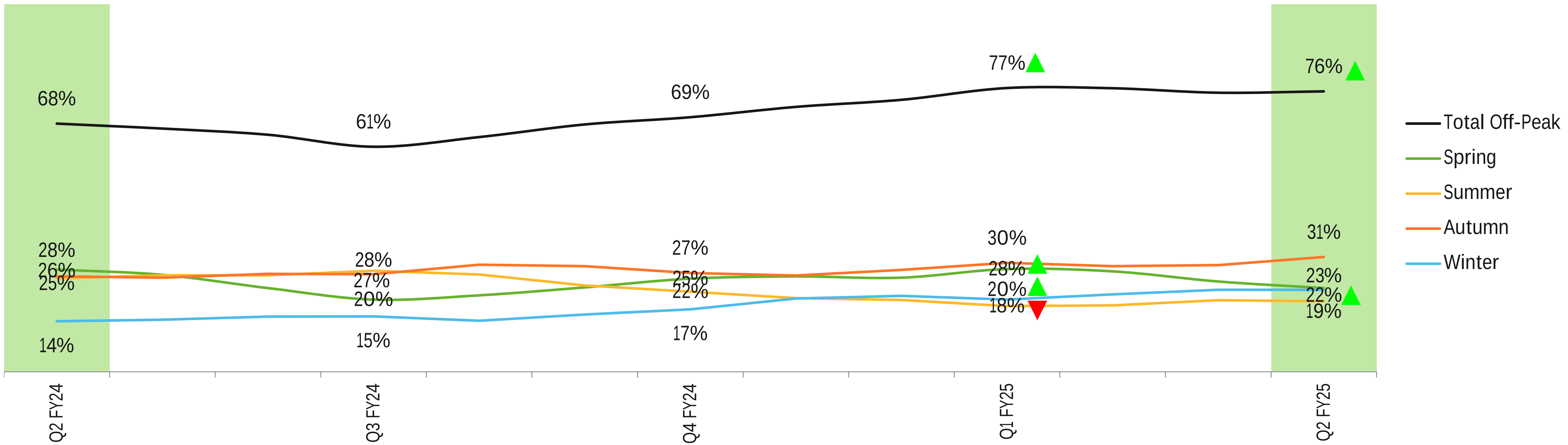


Significantly higher / lower than six months prior at 95%

1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 900, 900, 901, 904, 754
2. Question “At what time(s) of year would you consider visiting New Zealand?”

With growing preference for winter over the last two quarters, preference for off-peak travel has recently reached peak levels

Seasonal Preference
AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six months prior at 95%

1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 900, 900, 901, 904, 754
2. Question “When would you prefer to visit New Zealand?”

Autumn and winter considerers skew towards females, while spring and winter considerers skew towards families with dependent children

Profile of seasonal considerers

AC Monitor | Current 5M |
Total Active Considerers

	Spring Off-Peak	Summer Peak	Autumn Off-Peak	Winter Off-Peak
Male	54%	52%	47%	42% ▼
Female	44%	47%	50% ▲	53% ▲
Gender diverse	2% ▼	1% ▼	4%	4%
18 to 29 yrs	45%	36% ▼	47%	42%
30 to 39 yrs	32%	35% ▲	23% ▼	32%
40 to 49 yrs	17%	19%	19%	17%
50 to 59 yrs	5%	7%	7%	5%
60 to 74 yrs	1% ▼	3%	3%	4%
Beijing, Shenyang & Tianjin	24%	27%	30%	28%
Changsha, Chengdu, Xian, Wuhan & Chongqing	27%	27%	29%	25%
Guangzhou & Shenzhen	24% ▲	18%	11% ▼	15%
Shanghai, Nanjing & Hangzhou	25%	28%	30%	31%
Less than 20,000 CNY	8%	4%	6%	3% ▼
20,000 – 39,999 CNY	32%	30%	26% ▼	33%
40,000 CNY or more	60%	65%	68% ▲	65%
Prefer not to say	0%	0%	0%	0%
SINK / DINK	17% ▼	14% ▼	25%	23%
Family (dependent children)	69% ▲	64%	55% ▼	65% ▲
Family (independent children)	14% ▼	22%	21%	12% ▼

1. Sample size: Spring n = 253 | Summer n = 222 | Autumn n = 335 | Winter n = 238

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

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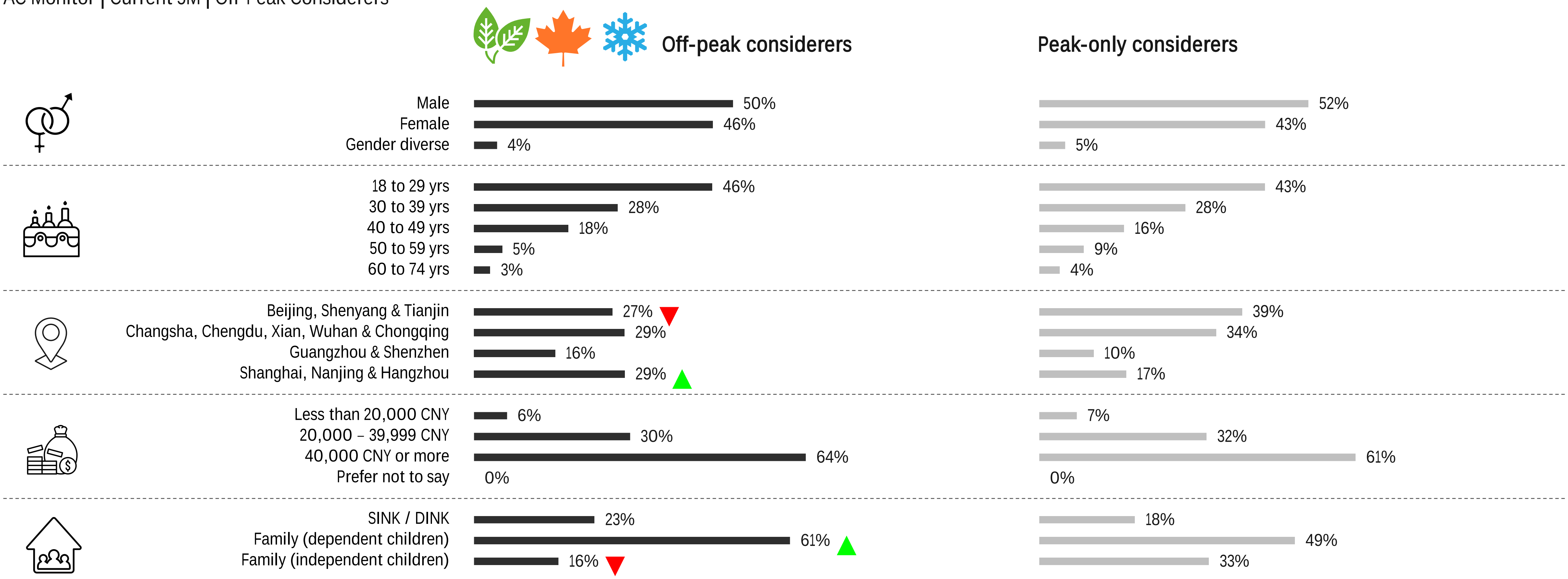
Off-peak considerers as a whole skew towards families with dependent children and those from Shanghai, Nanjing & Hangzhou

Profile of off-peak considerers

AC Monitor | Current 5M | Off-Peak Considerers



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1. Sample size: Off-Peak Considerers n = 631 | Peak-Only Considerers n = 123

Significantly higher / lower than non-considerers of that season

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With 84% off-peak consideration, the opportunity to drive off-peak arrivals among Chinese ACs is large with autumn representing the primary 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%

Source for top 8 markets: AC Monitor | Online population aged 18-74 | Current 5M
Australia n = 751 | China n = 754 | USA n = 750 | UK n = 750 | Germany n = 751 | Japan n = 750 | India n = 751 | Singapore n = 750
Source for South Korea and Canada: Emerging Markets AC Monitor | Online population aged 18-74 | Q2 FY25 Wave | n = 300

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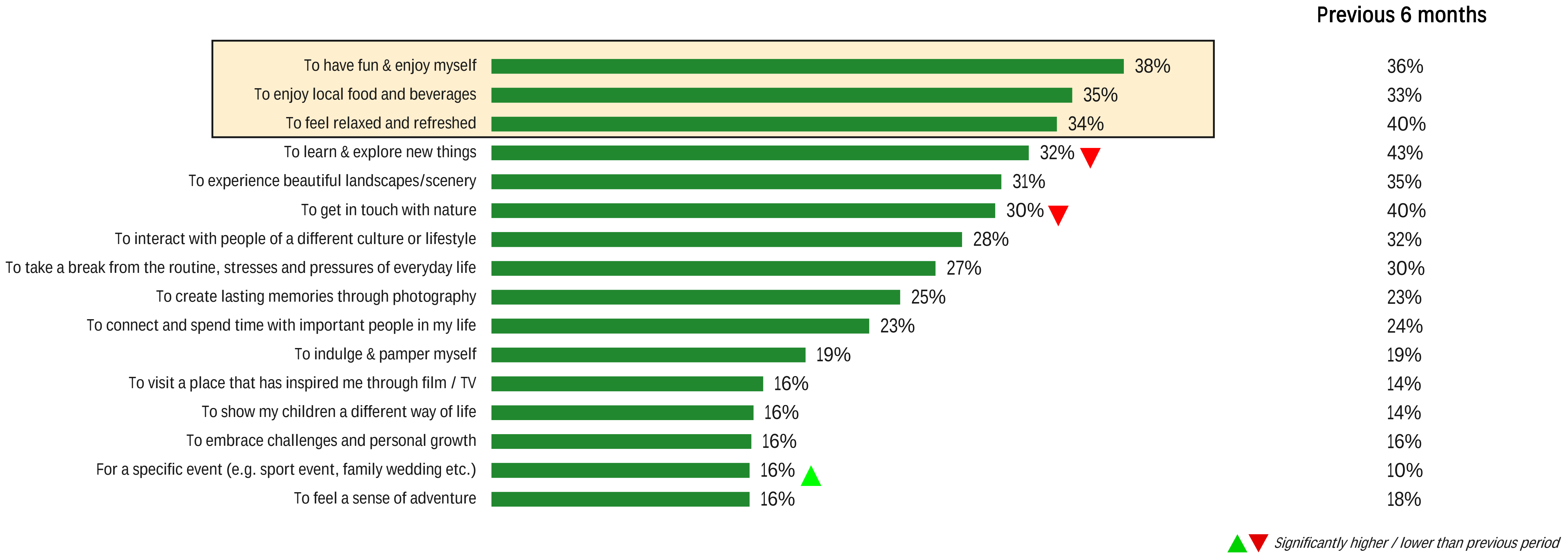
2 How can TNZ drive desirability of New Zealand as a holiday destination?

Continue to reinforce messages around key holiday motivations such as opportunities for fun, relaxation and local food and beverages; motivations to learn, explore and engage with nature have recently dipped but remain relatively strong

Reasons to visit New Zealand for a holiday

AC Monitor | Current 5M | Total Active Considerers

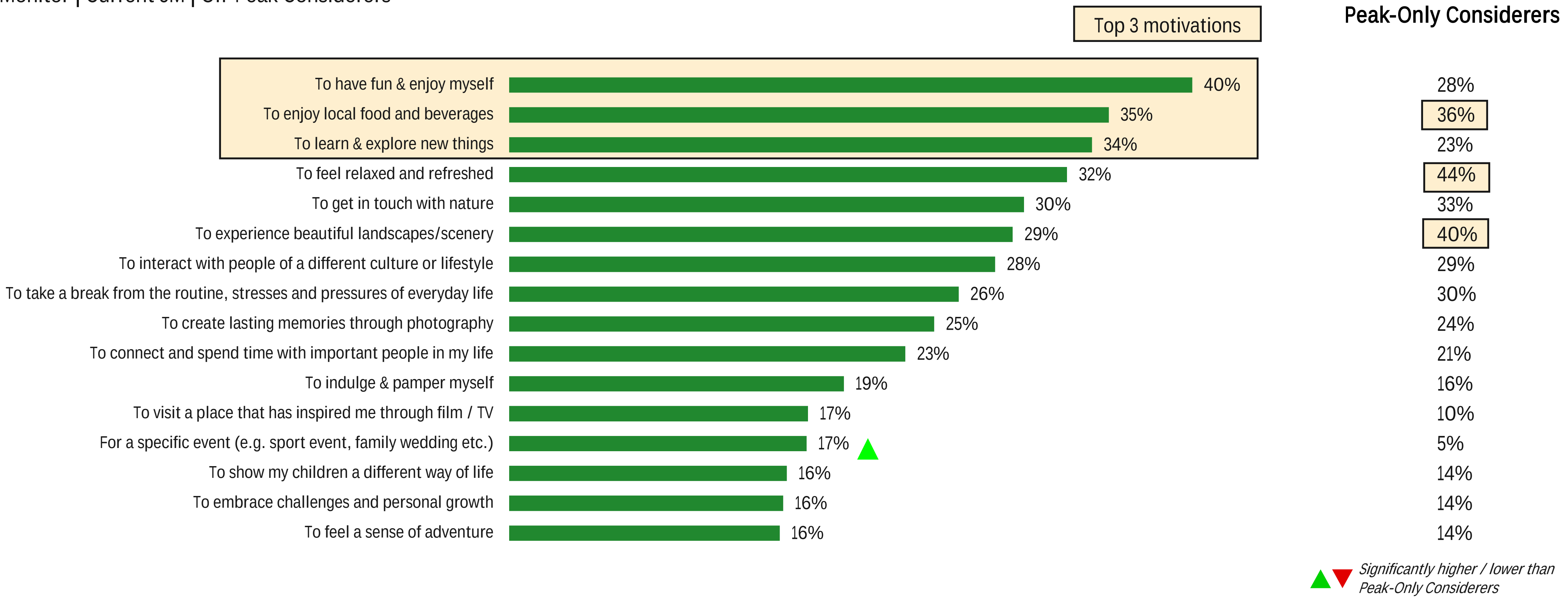


Sample size: Current 5M n = 304 | Previous 6M n = 451
Question "Why do you want to visit New Zealand for a holiday?"

Compared to peak considerers, off-peak considerers are more likely to be driven by fun, learning, exploring, and specific events – thus, there is an opportunity for targeted messages

Reasons to visit New Zealand for a holiday

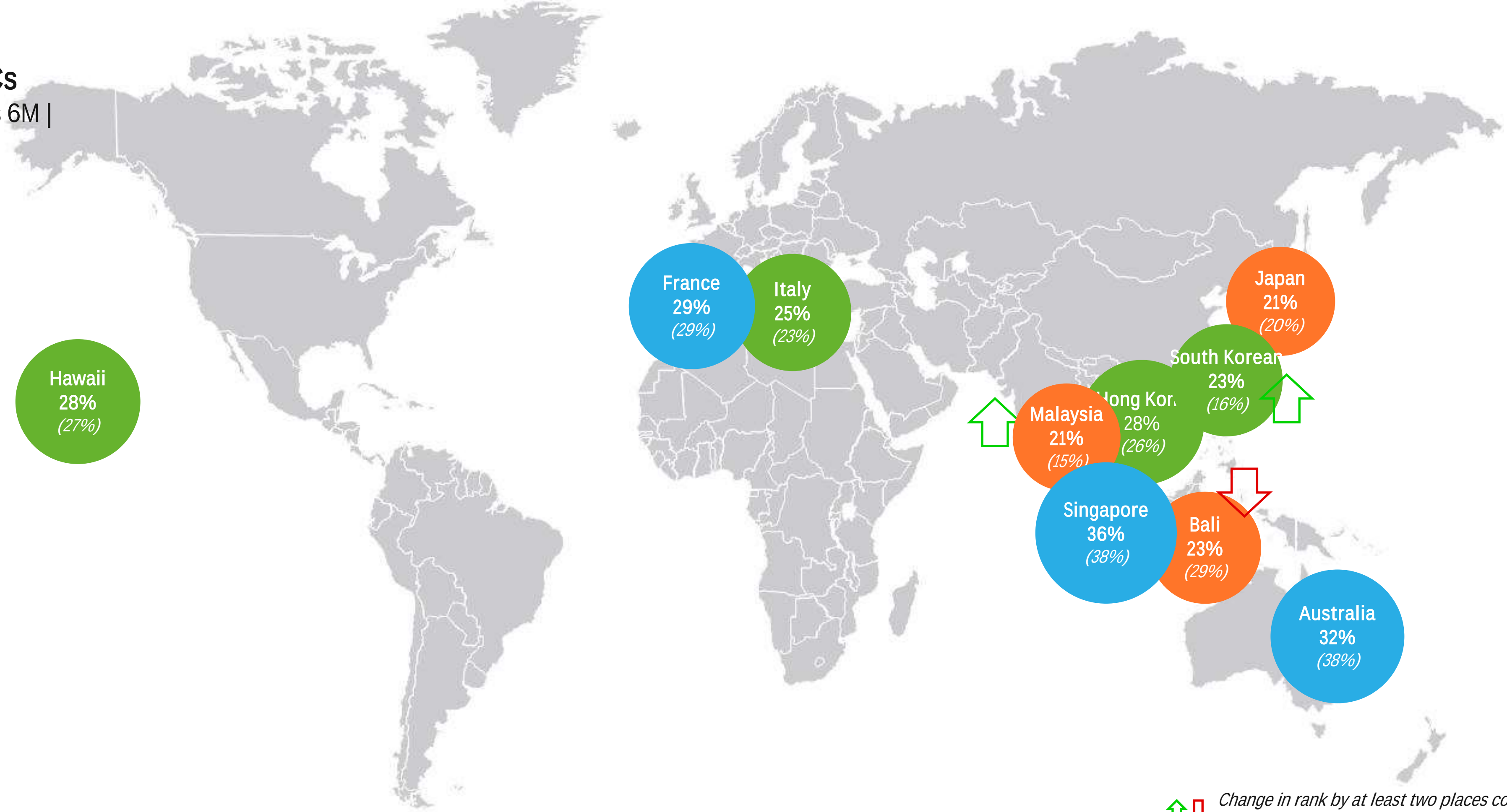
AC Monitor | Current 5M | Off-Peak Considerers



Sample size: Off-Peak Considerers n = 260 | Peak-Only Considerers n = 44
Question "Why do you want to visit New Zealand for a holiday?"

Singapore, Australia and France remain New Zealand's top competitors in terms of preference; there is a growing preference for South Korea and Malaysia

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



Both Canada and Norway have dropped out of the Top 10 Ranking

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 = 754; Previous 6 months n = 901
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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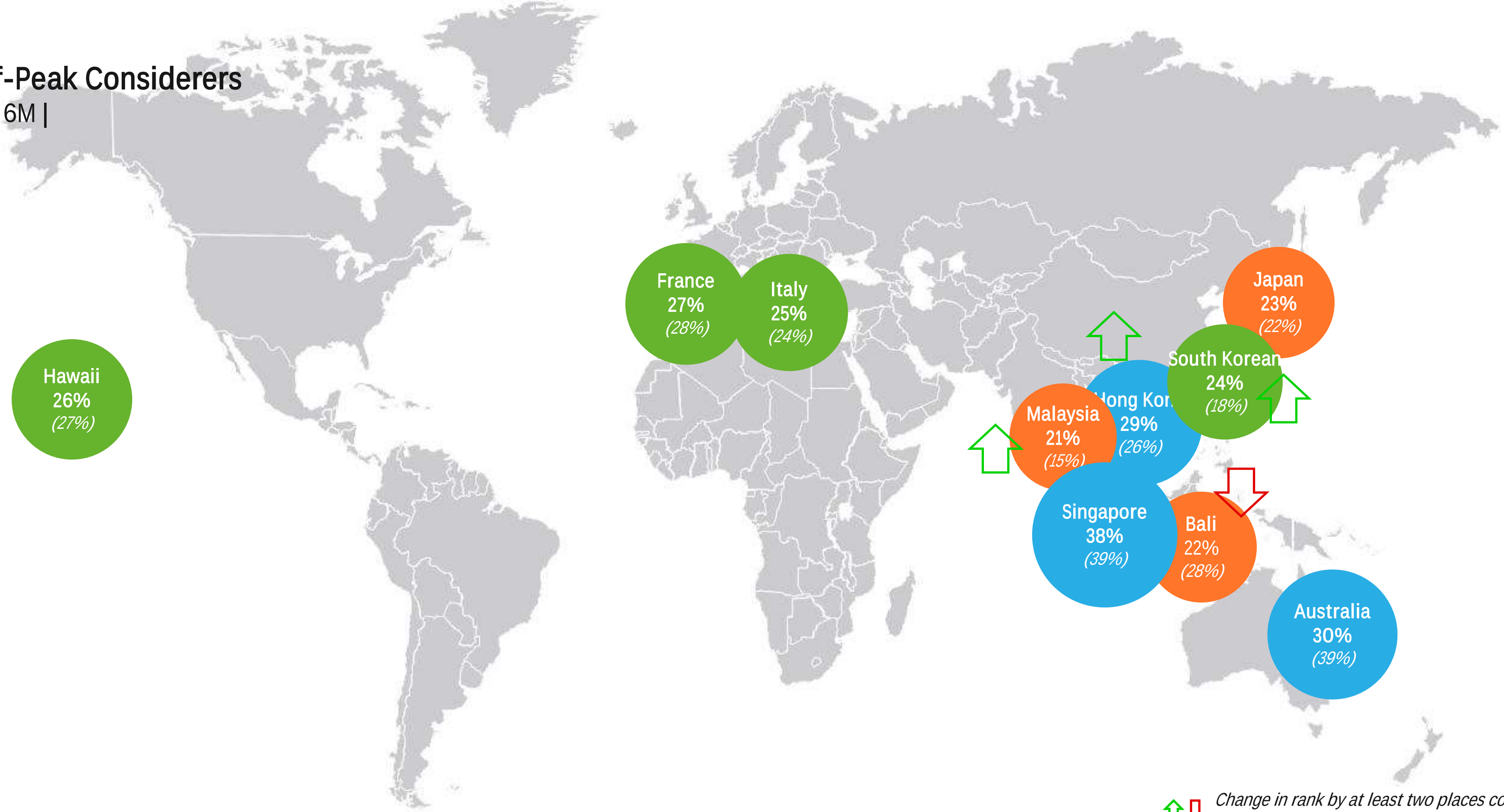
Among off-peak considerers, Singapore and Australia remain top competitors but Hong Kong has risen in ranking to #3 most preferred; Malaysia and South Korea have also increased in preference

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



Canada has moved out of the Top 10 ranking

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 = 631; Previous 6 months n = 735
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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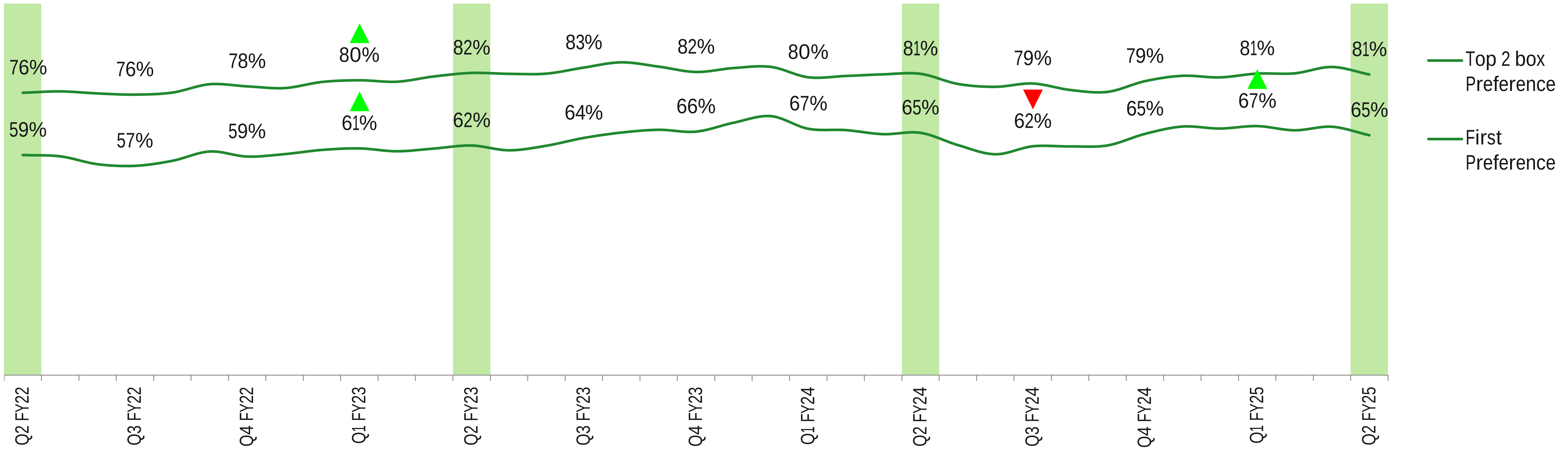
Among ACs, first-choice preference is at the same level achieved a year ago, however it has recovered since the lows of post-Covid period

New Zealand Preference KPI

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six months prior at 95%

1. Sample size: Q2 FY22 – Q2 FY25 (6MRA) n = 901, 901, 901, 902, 902, 901, 900, 900, 900, 900, 901, 904, 754
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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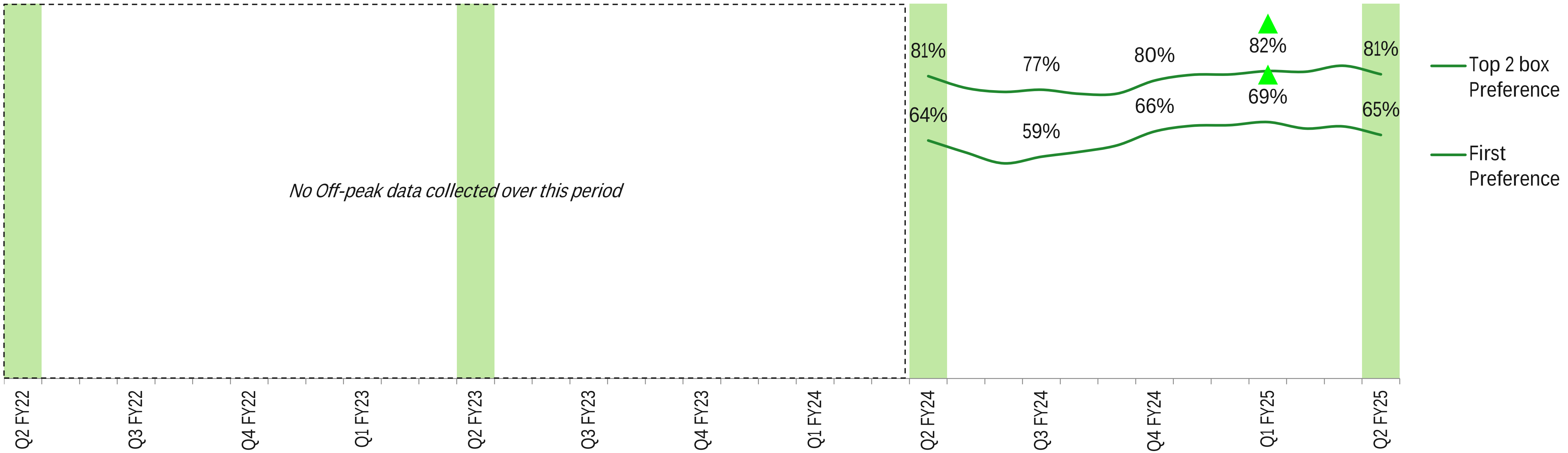
Among off-peak considerers, first-choice preference for New Zealand is on par with levels seen a year ago

New Zealand Preference KPI for off-peak considerers

AC Monitor | 6MRA | Off-Peak Considerers



Significantly higher / lower than six months prior at 95%

1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 685, 669, 735, 769, 631
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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

Brand associations

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

Appendix: Brand associations 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 the ordinary	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

Context to preference driver analysis

Using Jaccard's analysis, we estimate which brand associations 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

A range of experiences and adventure, and opportunities to relax emerge as top preference drivers while other strategic drivers, such as all seasons and indigenous culture, strengthen in impact

Drivers of preference for New Zealand

AC Monitor | Rank | 2024 (Jul-Dec 24) | Total Active Considerers

	2024 rank	2023 rank	2022 rank(1)
Range of experiences	1 ⇧	11	12
Range of adventure	2 ⇧	8 ⇩	23
Relax & refresh	3 ⇧	13 ⇩	7
Affordable activities	4	3	6
Escape the ordinary	5	6	2
Fun & enjoyment	6 ⇧	14 ⇩	3
Excitement	7 ⇩	2	*
All seasons	8 ⇧	17 ⇩	11
Indigenous culture	9 ⇧	20 ⇧	25
Family friendly	10 ⇧	22 ⇩	13
Friendly people	11	9 ⇧	21
Wildlife experience	12 ⇧	18	20
Clean & unpolluted	13 ⇩	1	5
Quality food & wine	14 ⇧	19	15
Affordable to fly to	15 ⇩	7	4

	2024 rank	2023 rank	2022 rank(1)
Local culture	16 ⇩	10	9
Landscapes & scenery	17 ⇩	4	1
Unique experiences	18	21 ⇩	10
Safe destination	19	16	16
Amazing beaches	20 ⇩	15	*
Interesting cities	21	25	29
Easy to travel around	22	23	26
Iconic attractions	23	24	27
Relationship with the land	24	26	30

Changes in brand attribution list affect comparability in ranking over time

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

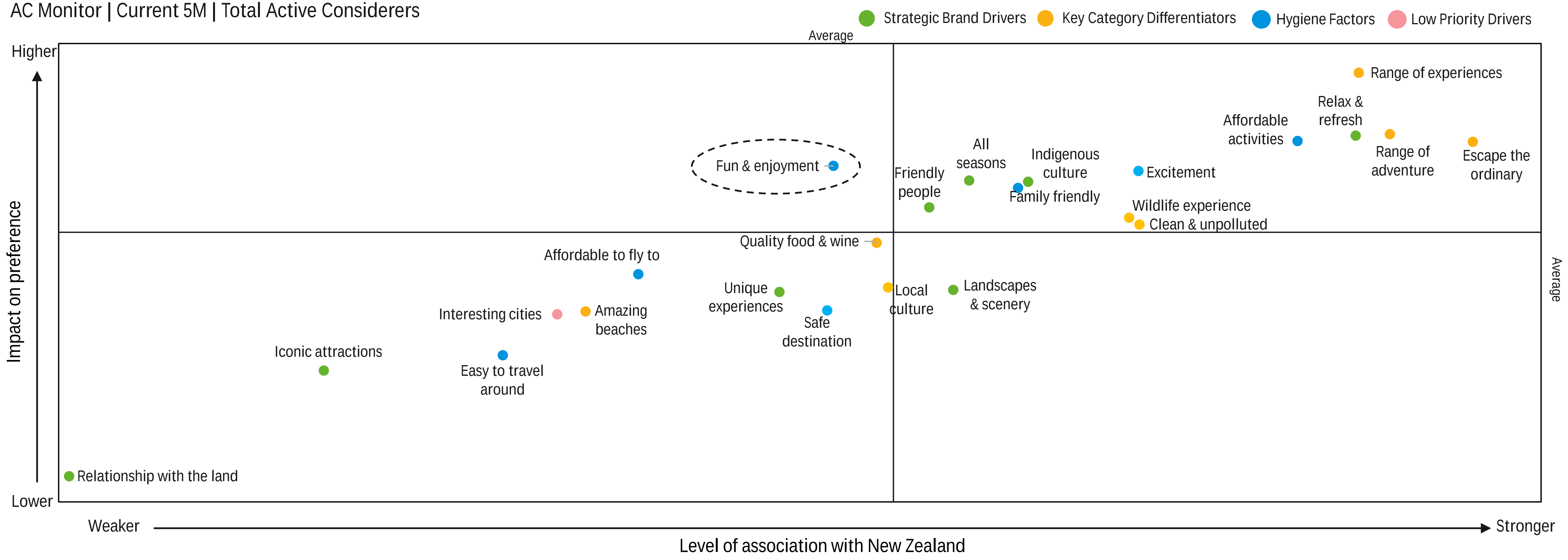
1. Some ranks may be missing if the statement has been removed for the current analysis period
* Not asked at that time

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

New Zealand is strongly associated with most high-impact drivers, except for 'fun & enjoyment' driver there is an opportunity to improve performance

Brand Associations of New Zealand x Impact on preference

AC Monitor | Current 5M | Total Active Considerers

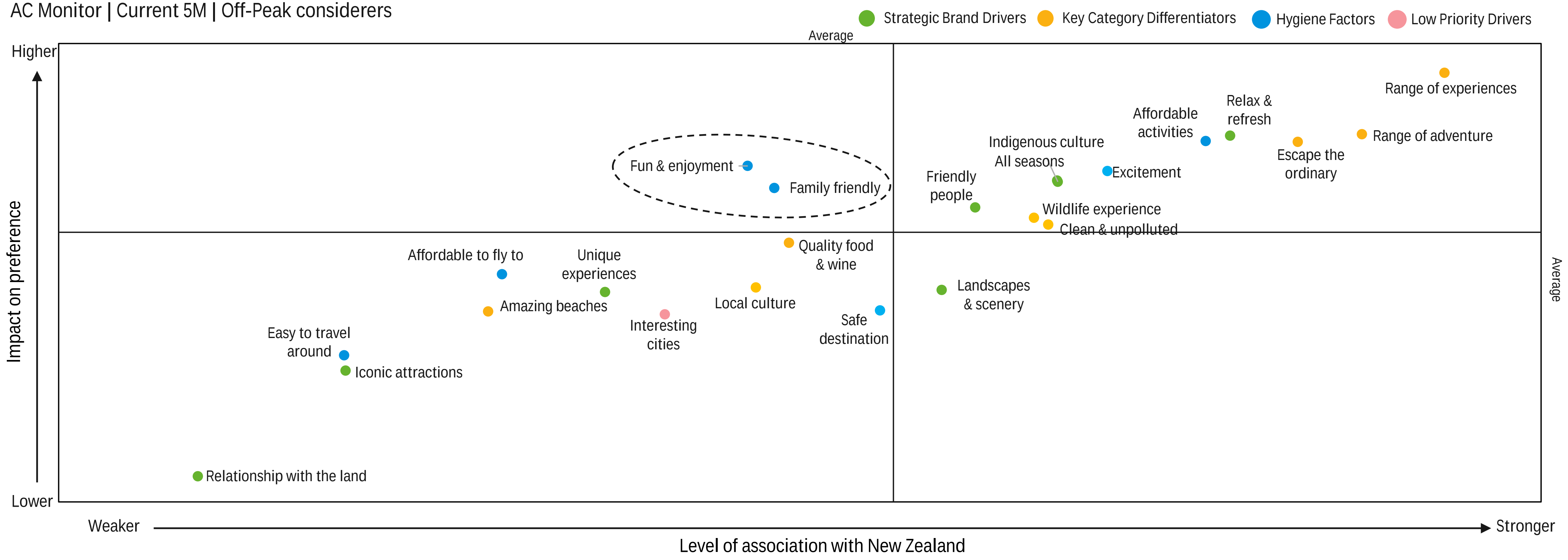


1. Sample size: n = 750
2. Question: "Which destinations, if any, do you associate with this statement?"

In addition to ‘fun & enjoyment’, there is also room to build perceptions of family friendliness among off-peak considerers

Brand Associations of New Zealand x Impact on preference

AC Monitor | Current 5M | Off-Peak considerers



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1. Sample size: n = 631
2. Question: ”Which destinations, if any, do you associate with this statement?”

100% PURE NEW ZEALAND

Relative to competitors, New Zealand stands out for the higher impact category differentiators including range of experiences and adventure; while it does have a competitive edge on opportunities to relax, more could be done to enhance its edge across most strategic brand drivers

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	Singapore	Australia	France	Hawaii	Hong Kong
Strategic Brand Drivers	Relax & refresh	107	103	94	94	103	97
	Indigenous culture	104	87	108	93	109	97
	All seasons	101	107	92	97	113	87
	Friendly people	101	103	92	96	109	100
	Landscapes & scenery	101	92	120	94	104	86
	Unique experiences	102	96	94	117	88	106
	Iconic attractions	89	106	98	117	90	107
	Relationship with the land	95	99	98	115	101	95
Key Category Differentiators	Range of experiences	107	96	94	99	105	96
	Range of adventure	108	96	105	96	98	93
	Escape the ordinary	112	88	104	98	101	91
	Wildlife experience	108	90	119	95	90	93
	Clean & unpolluted	101	97	103	93	102	104
	Quality food & wine	95	103	97	102	90	117
	Local culture	97	102	99	106	98	100
	Amazing beaches	98	91	117	91	118	82

Actions for TNZ:

Strengths:

- Relax and refresh
- Range of experiences
- Range of adventure
- Escape the ordinary
- Wildlife experiences

Drivers to dial up:

- Iconic attractions
- Relationship with the land
- All seasons
- Friendly people
- Landscapes and scenery
- Unique experiences

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?"

Compared to other destinations, New Zealand is perceived to be a more family friendly but less affordable and easy to travel around

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	Singapore	Australia	France	Hawaii	Hong Kong
Hygiene Factors	Affordable activities	96	103	97	100	105	100
	Fun & enjoyment	102	93	90	101	108	107
	Excitement	101	107	94	96	96	106
	Family friendly	105	100	100	93	103	97
	Affordable to fly to	89	106	94	104	97	115
	Safe destination	99	124	92	85	97	101
	Easy to travel around	94	109	96	104	90	112
Low Priority	Interesting cities	93	100	102	114	87	108

Actions for TNZ:

Strengths:

- Family friendly

Drivers to dial up:

- Affordable activities
- Affordable to fly to
- Easy to travel around

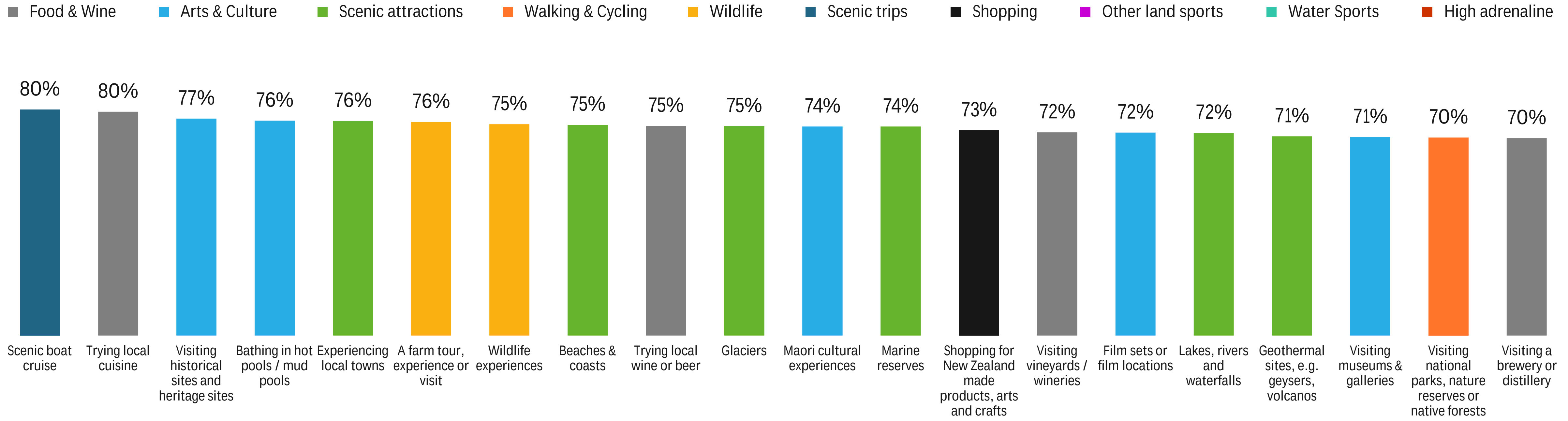
1. Sample size: n = 750
2. Question: "Which destinations, if any, do you associate with this statement?"

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

ACs have a vast range of interests, offering an opportunity to showcase a range of affordable activities available in New Zealand

Activities interested in doing in New Zealand (Top 20)

AC Monitor | Current 5M | Total Active Considerers



Off-Peak considerers

80%	80%	77%	76%	75%	76%	74%	74%	74%	73% ▼	73%	75%	72%	71% ▼	73%	70%	68%	70%	69%	70%

1. Sample size: Total ACs n = 304 | Off-Peak Considerers n = 260
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*

3 How can TNZ maximise impact along consumer path to purchase?

Addressing factors such as safety concerns and ease of travelling around New Zealand should be a priority as they are growing knowledge gaps

Top ten knowledge gaps

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

	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	How safe it is from crime	31% ▲	20%
2	How easy it is to travel around	29% ▲	23%
3	What the weather is like	27%	25%
4	What the best time of year is to do the activities I want to	26%	NA
5	How long it takes to travel between the main attractions	25%	24%
6	What / where the recommended things to see and do are	24%	21%
7	How safe it is to participate in adventure activities	24%	27%
8	The length of time required to fly to New Zealand	24%	20%
9	How welcoming the locals are	24%	22%
10	The quality and variety of food and beverage options	24%	24%

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

1. Sample size: Current 5M n = 450 | 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?"

ACs in the booking mindset have greater information gaps than ACs who are still at the top of the funnel, thus addressing diverse knowledge gaps at the booking stage is key to driving arrivals

Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5M | Total Active Considerers

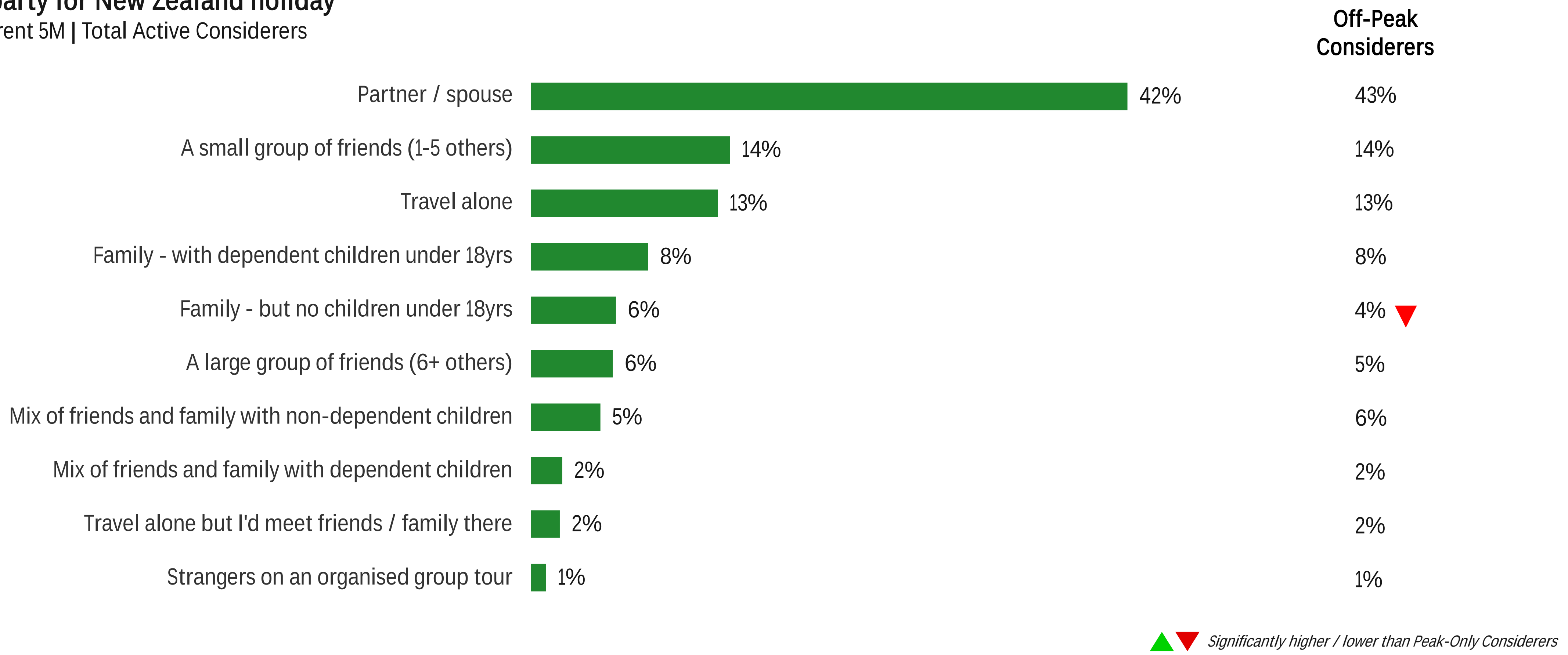
	What do ACs want to know more about before choosing New Zealand?	Dreaming	Discovering	Planning	Booking
1	How safe it is from crime	28%	37%	Low sample size	35%
2	How easy it is to travel around	28%	25%		35%
3	What the weather is like	25%	29%		29%
4	What the best time of year is to do the activities I want to	23% ▼	18%		43% ▲
5	How long it takes to travel between the main attractions	22% ▼	21%		40% ▲
6	What / where the recommended things to see and do are	22%	21%		35% ▲
7	How safe it is to participate in adventure activities	26%	16%		24%
8	The length of time required to fly to New Zealand	22%	20%		37% ▲
9	How welcoming the locals are	22%	24%		34% ▲
10	The quality and variety of food and beverage options	23%	28%		24%

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

1. Sample size: Dreaming n = 296 | Discovering n = 67 | Planning n = 1 | Booking n = 86
2. Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

ACs are most likely to travel to New Zealand with their partner/spouse

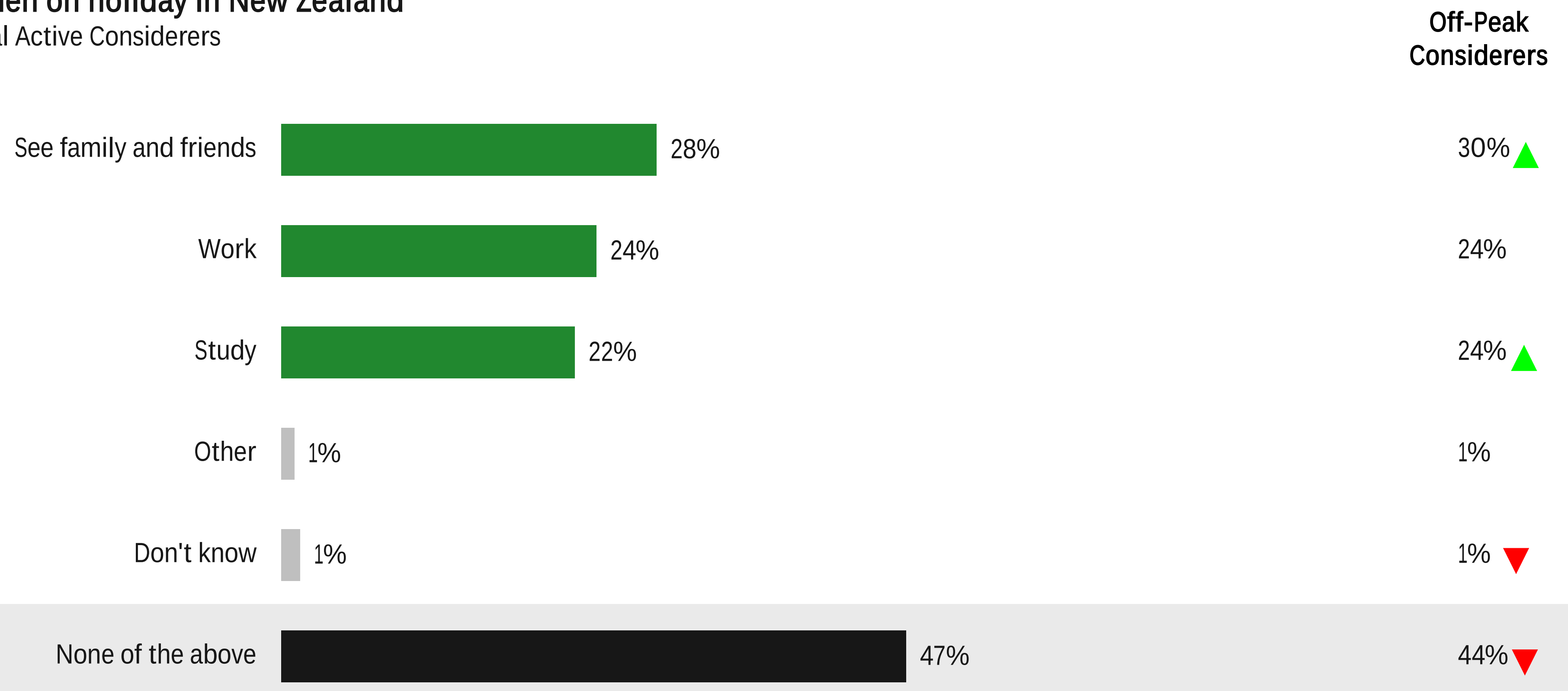
Likely travel party for New Zealand holiday
AC Monitor | Current 5M | Total Active Considerers



1. Sample size: Total ACs n = 754 | Off-Peak Considerers n = 631
2. Question "Who are you most likely to travel with on your trip to New Zealand?"

Off-peak considerers are more likely to visit friends/family or study while on holiday than ACs overall

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



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

Significantly higher / lower than Peak-Only Considerers

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1. Sample size: Total ACs n = 754 | Off-Peak Considerers n = 631
2. Question "When considering travelling to New Zealand for a holiday, do you also intend to…"

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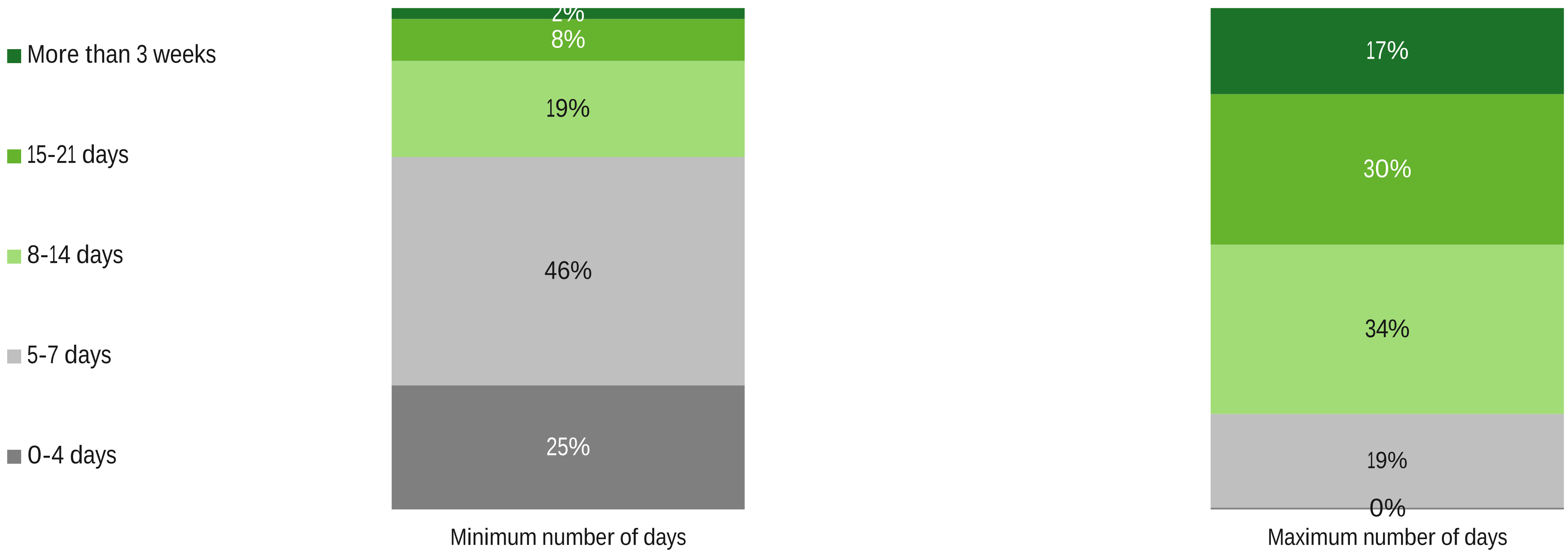
For most ACs, the ideal holiday length is between 5 and 21 days

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



1. Sample size: Total ACs n = 754
2. Question "Thinking about a future holiday in New Zealand, what would be the minimum and maximum amount of time you would ideally spend in New Zealand?"

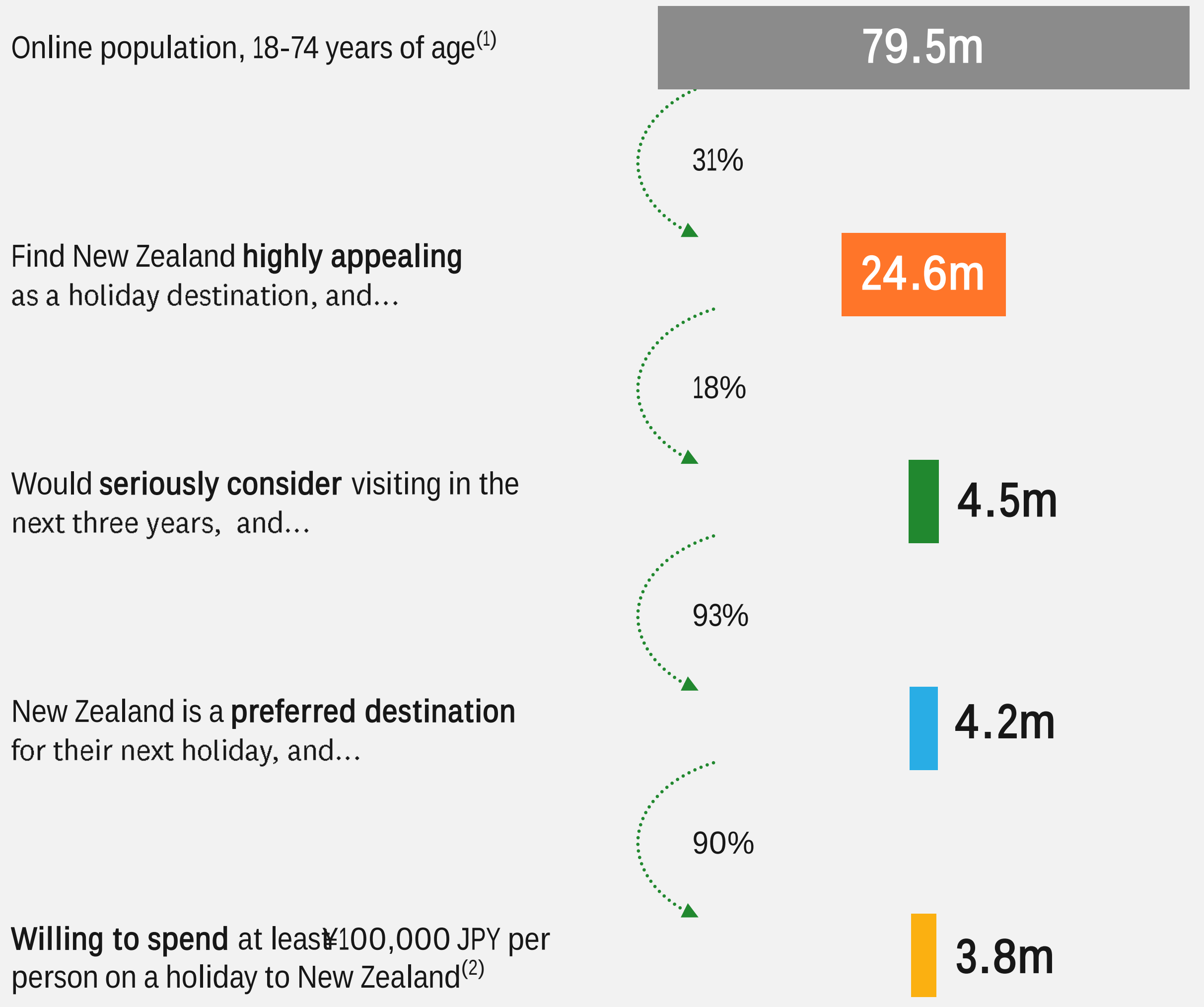
JAPAN

5 What is the size of opportunity in Japan?

Active Considerer Funnel – Japan

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 ¥100,000 JPY per person) to New Zealand.



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

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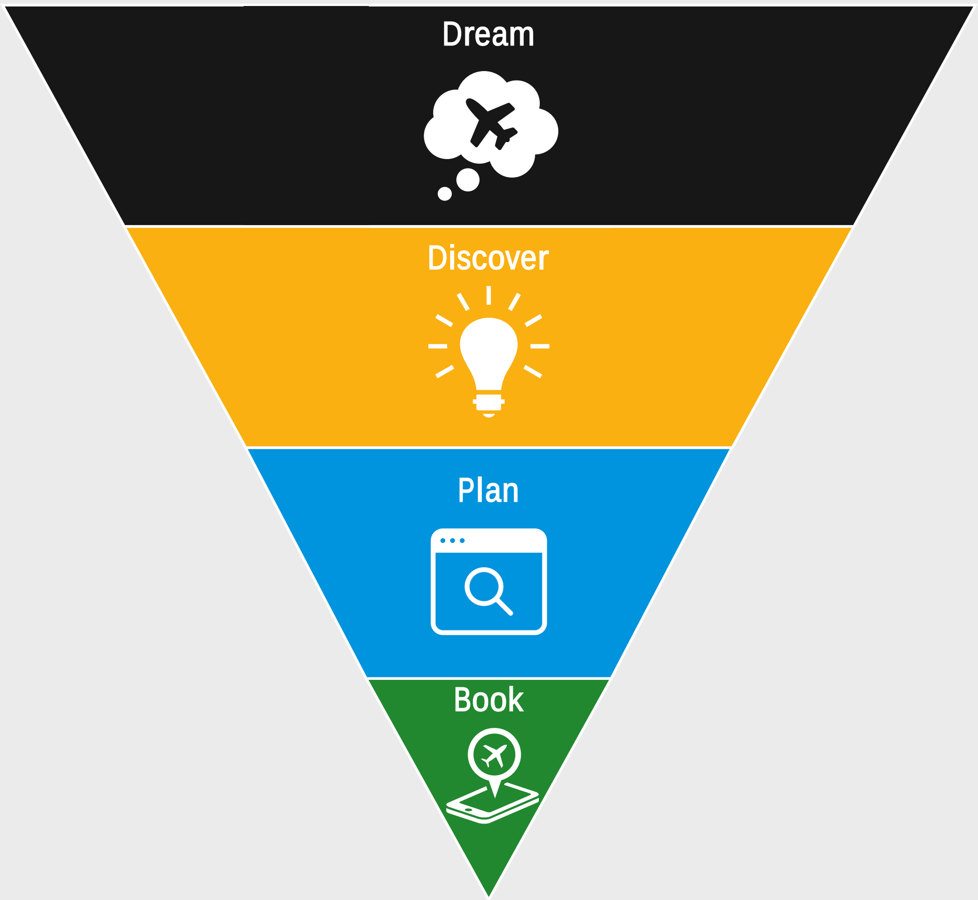
Journey funnel to New Zealand – Japan

***The addition of 'Discover' into our Brand Tracking commenced in July 2024 (at the start of FY25). We are still calibrating and reviewing this question.**



Book to come to NZ
Moment of Truth

	Active Considerers (3.8m)	Size (%) Q2 FY25	Size (%) Q4 FY24
Dream	1.3m	35%	*33%*
Discover	1.3m	33%	*NA*
Plan	0.1m	4%	*19%*
Book	1.0m	27%	*48%*

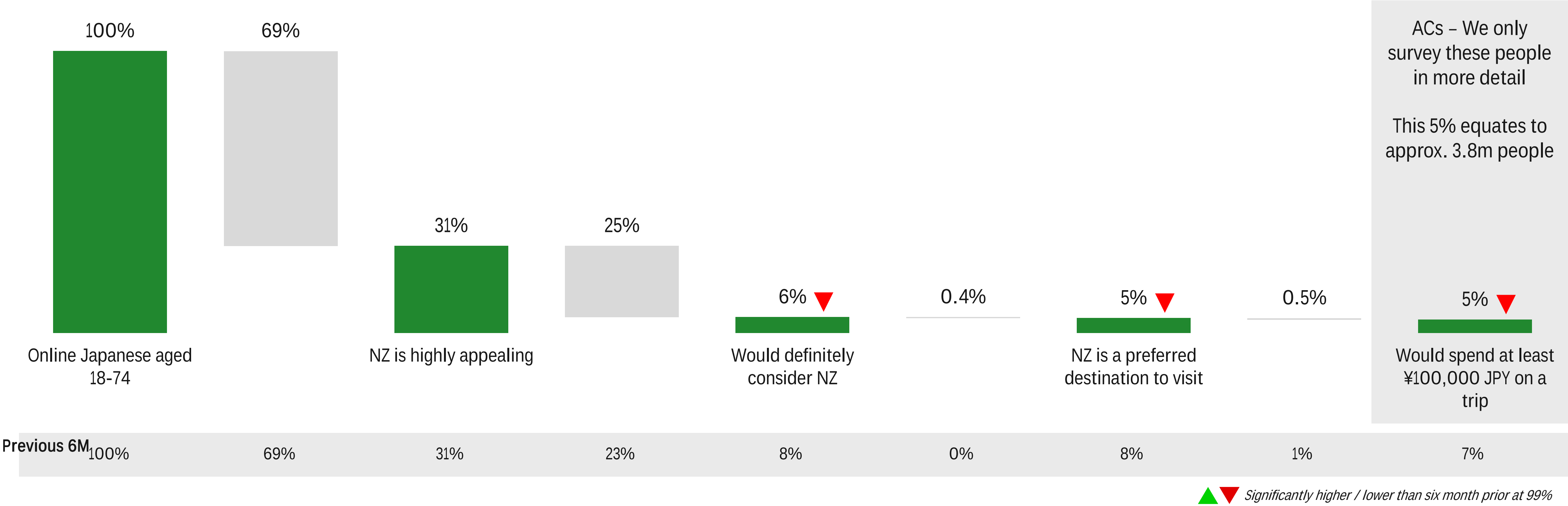
Note: FY25 change

- 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

The AC incidence in Japan has declined in the last 6 months, yet Japan remains a sizable opportunity for TNZ with 3.8 million ACs

Qualifying criteria for defining ACs

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



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 = 25822 | Q4 FY24 n = 16686

The appeal of New Zealand holidays has been stable in the last year, but remains significantly lower than the pre-pandemic levels

Appeal

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

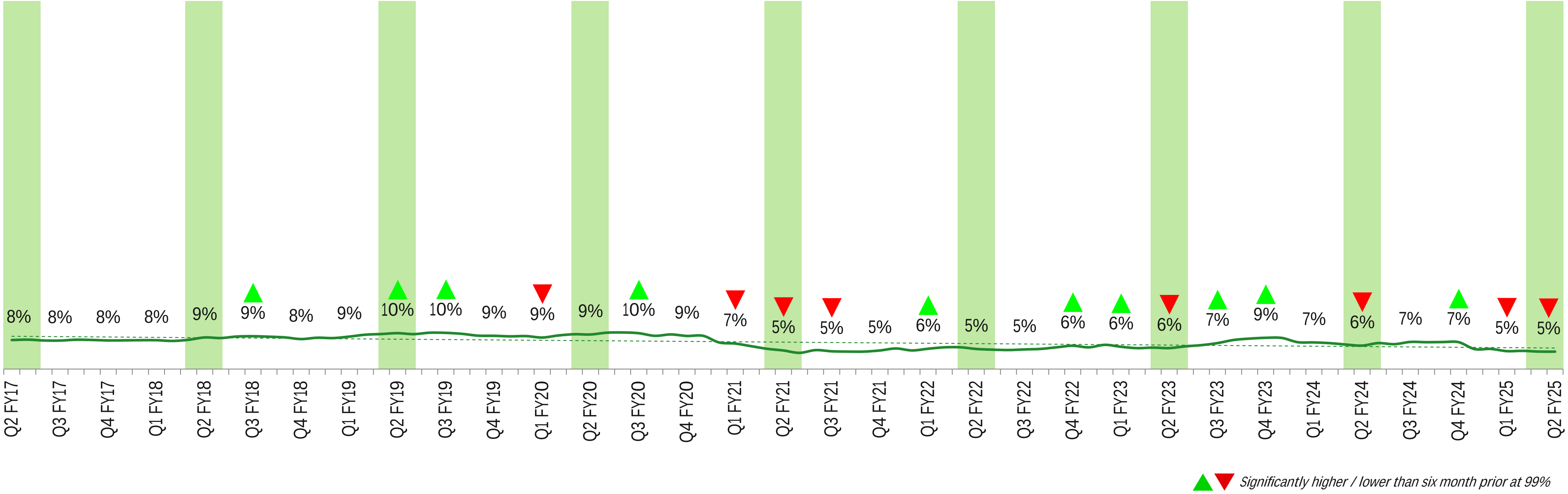
- Appeal is measured among the total online population aged 18 to 74 years old, and is the 'above the funnel' measure
- Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals
- Appeal is likely to be 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

1. Sample size: Q2 FY17 – Q2 FY25 (6MRA) minimum n = 10336 | maximum n = 28265
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

The AC incidence is at 5%, which is similar to a year ago

Incidence of ACs

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

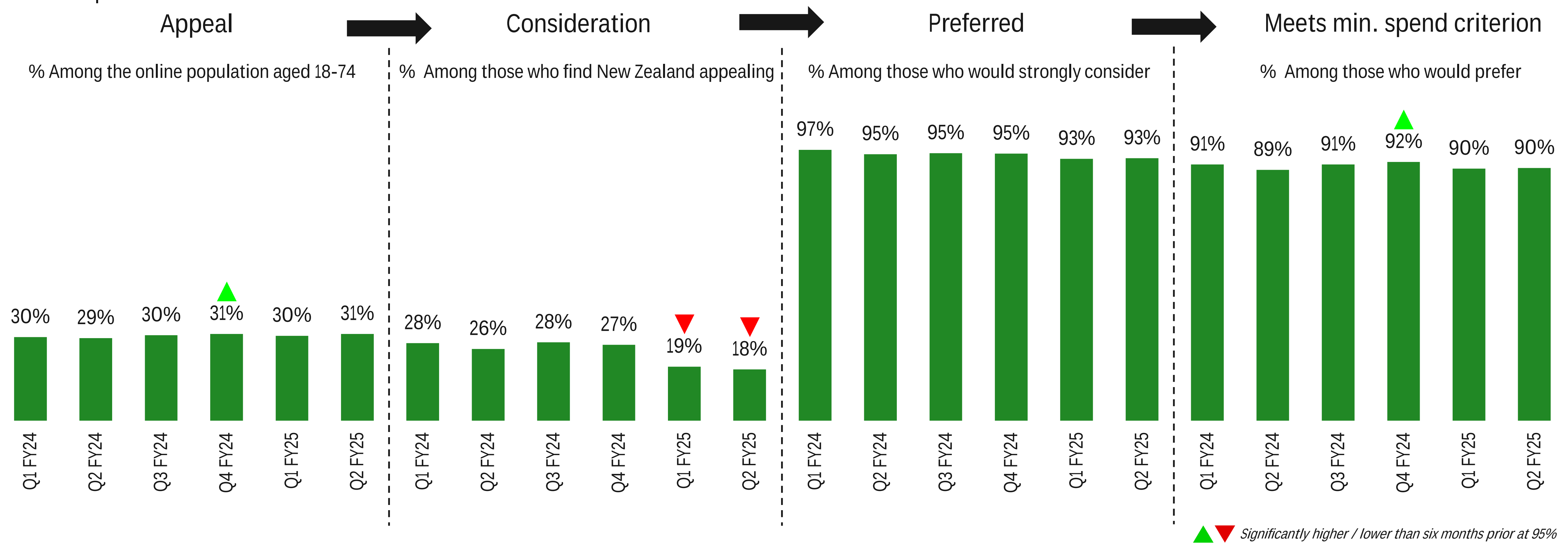


1. Sample size: Q2 FY17 – Q2 FY25 (6MRA) minimum n = 10336 | maximum n = 28265
2. % of population who find New Zealand as a holiday destination as highly appealing (%8-10), has strong consideration to holiday in New Zealand (%8-10), strongly prefers to holiday in New Zealand (%4-5), and would spend at least ¥100,000 JPY while holidaying in New Zealand

The recent dip in AC incidence is driven by a decline in consideration for New Zealand – to grow incidence, focus needs to be on growing appeal and conversion into consideration

Conversion of ACs through the Consideration Funnel

AC Monitor | 6MRA



1. Sample size: Q1 FY24 – Q2 FY25 (6MRA): Appeal n = 20374, 22181, 17734, 16686, 28265, 25822 | Consider n = 5777, 6391, 5200, 4875, 8481, 8068 | Prefer n = 1253, 1294, 1085, 1069, 1306, 1117 | Spend n = 1196, 1217, 1017, 1003, 1204, 1032
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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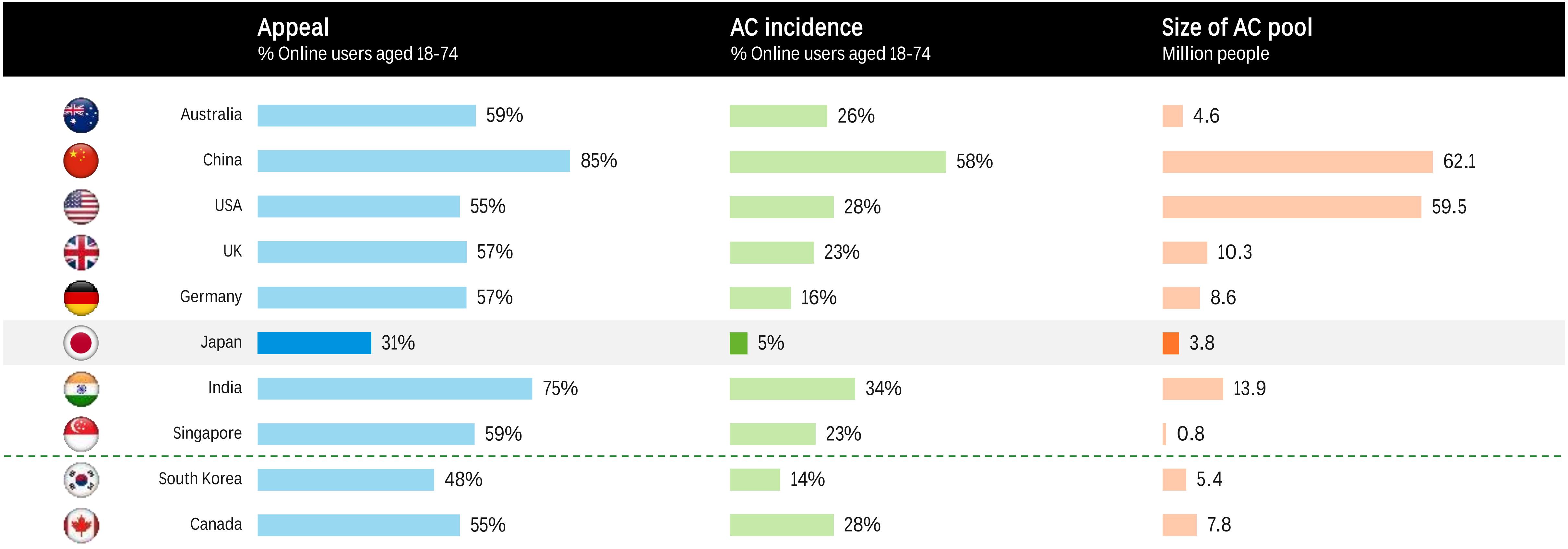
100% PURE NEW ZEALAND

Despite being smaller than other markets, Japan's pool of 3.8 million ACs remains a sizeable opportunity to drive arrivals



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Source for top 8 markets: AC Monitor | Online population aged 18-74 | Current 5M
Australia n = 3283 | China n = 1699 | USA n = 3994 | UK n = 3940 | Germany n = 5597 | Japan n = 25822 | India n = 2933 | Singapore n = 3555 | South Korea n = 3086 | Canada n = 1352

100% PURE NEW ZEALAND

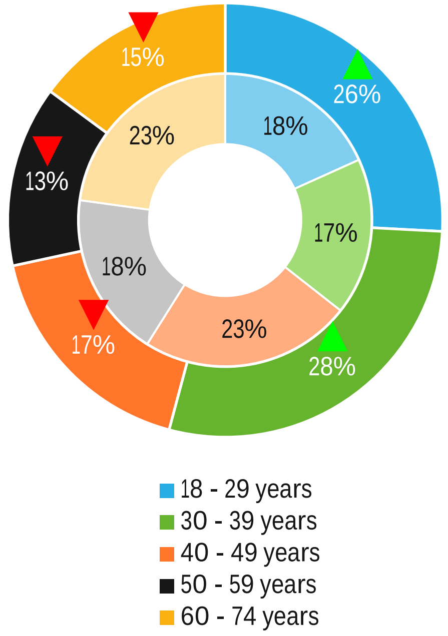
Compared to non-ACs, ACs are more likely to be aged 18-39 years and male; 38% have pre-school or school aged children

Profile of Active Considerers

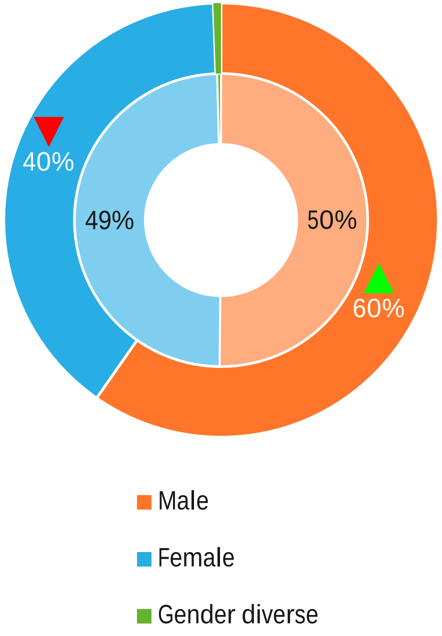
AC Monitor | Current 5M | Active Considerers vs Non-Active Considerers

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

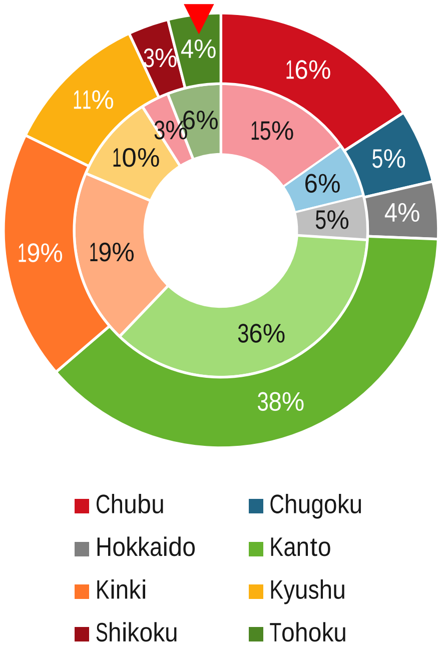
By age segment



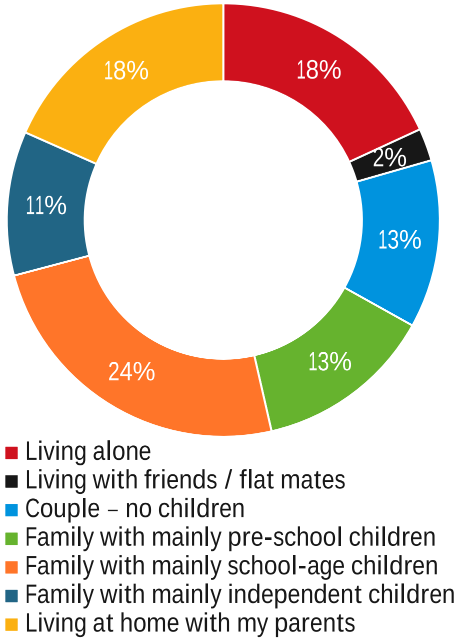
By gender



By region



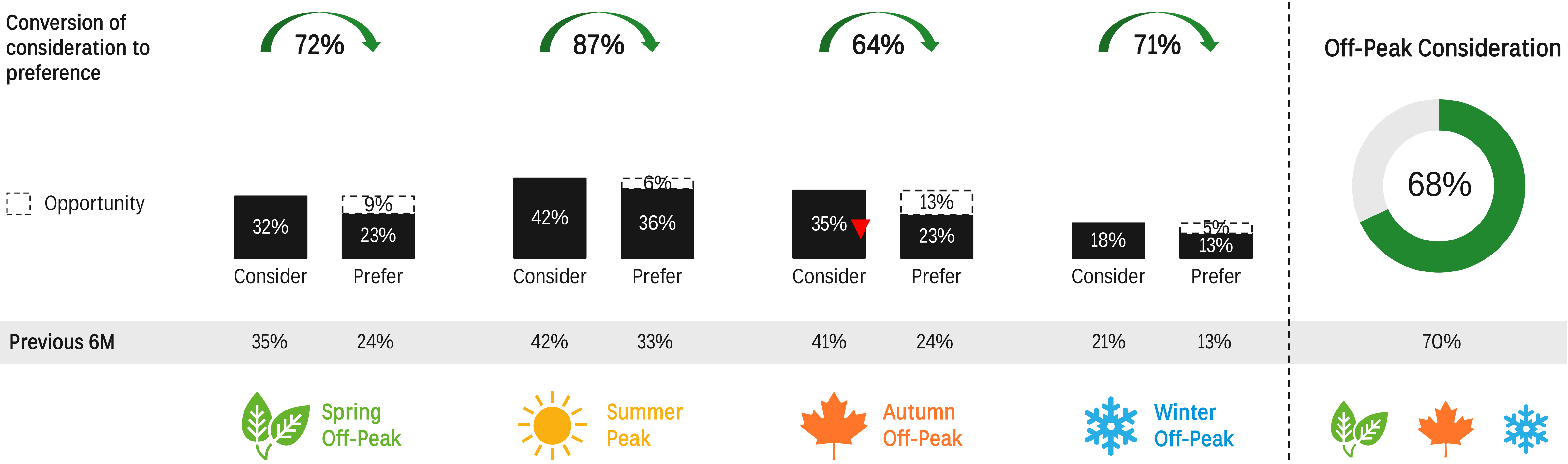
Household Composition



Significantly higher / lower than non-ACs

Off-peak consideration remains relatively stable and sizable at 68%, but consideration for autumn has recently slipped

Seasons – Consideration & Preference
AC Monitor | Current 5M | Total Active Considerers



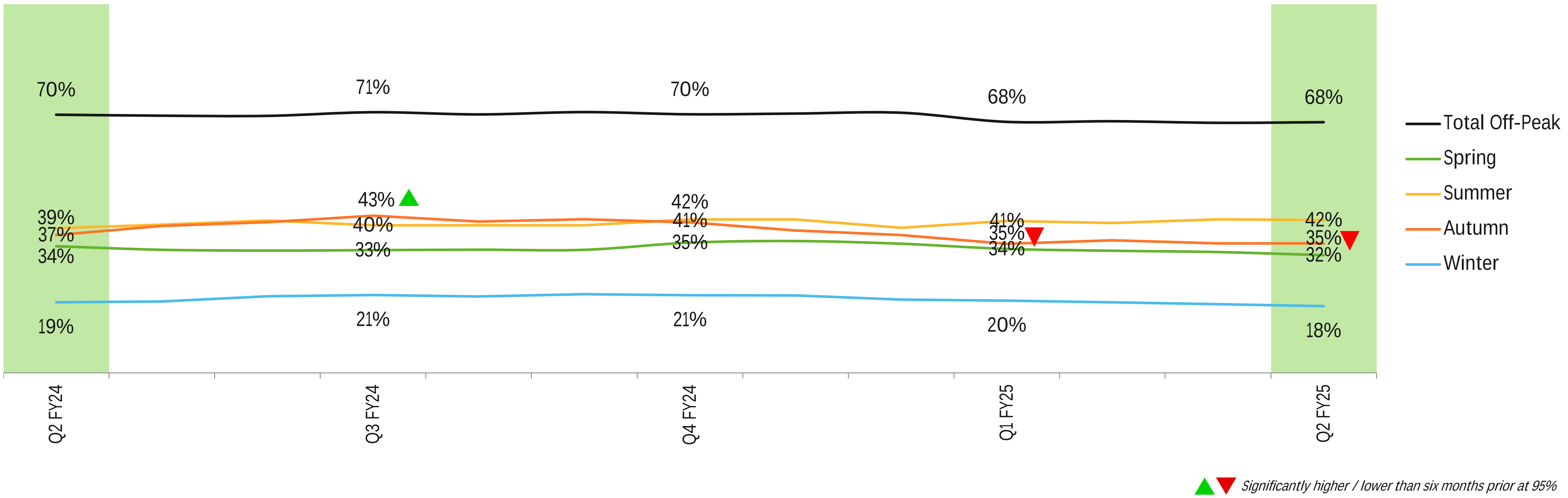
Significantly higher / lower than six months prior at 95%

1. Sample size: Current 5M n = 750 | Previous 6 months n = 900
2. Question: "At what time(s) of year would you consider visiting New Zealand?" When would you prefer to visit New Zealand?"
3. Spring = Sep, Oct, Nov | Summer = Dec, Jan, Feb | Autumn = Mar, Apr, May | Winter = Jun, Jul, Aug

Consideration for visiting New Zealand in Autumn has been declining over the last 6 months

Seasonal consideration

AC Monitor | 6MRA | Total Active Considerers

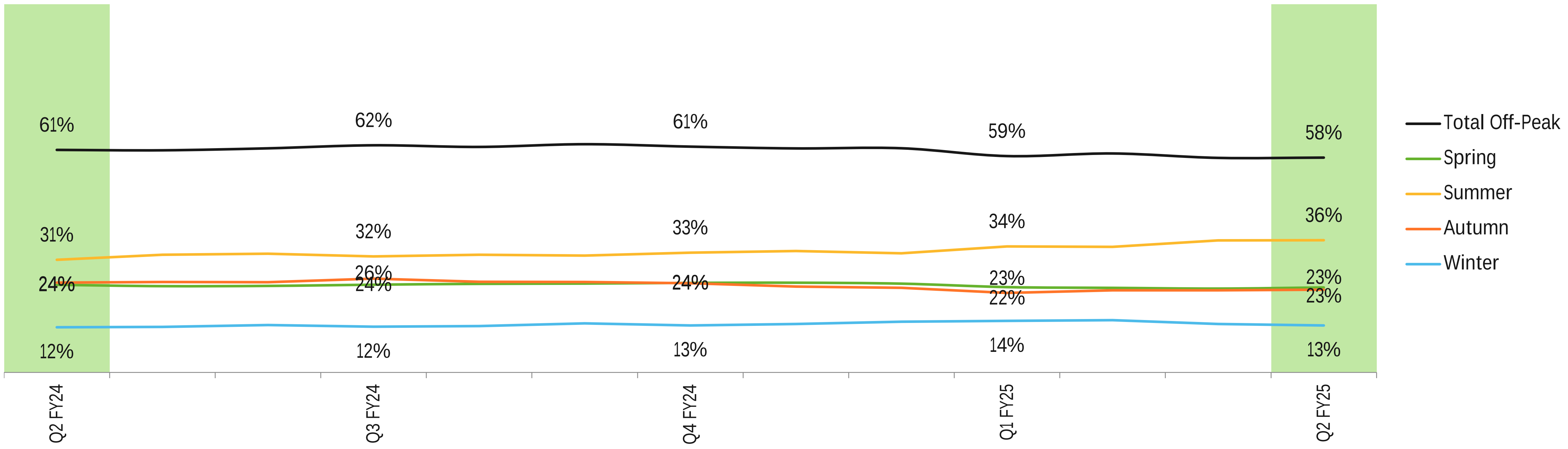


1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 900, 900, 900, 900, 750
2. Question "At what time(s) of year would you consider visiting New Zealand?"

Off-peak preference remains broadly stable, but growing preference for summer might impede the strategic objective of growing off-peak travel

Seasonal Preference

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six months prior at 95%

1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 900, 900, 900, 900, 750
2. Question "When would you prefer to visit New Zealand?"

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Autumn considerers skew under 30 years while winter considerers skew towards those aged 30 – 49 years; summer and winter considerers skew towards families with dependent children

Profile of Seasonal Considerers

AC Monitor | Current 5M |
Total Active Considerers

	Spring Off-Peak	Summer Peak	Autumn Off-Peak	Winter Off-Peak
Male	55% ▼	73% ▲	60%	58%
Female	44% ▲	27% ▼	40%	40%
Gender diverse	1%	0%	1%	2% ▲
18 to 29 yrs	19% ▼	22%	30% ▲	26%
30 to 39 yrs	31%	26%	28%	38% ▲
40 to 49 yrs	20%	20%	16%	23% ▲
50 to 59 yrs	14%	17% ▲	9% ▼	10%
60 to 74 yrs	16%	15%	16%	4% ▼
North	7%	9%	5%	8%
Kanto	42%	38%	38%	40%
Central	29% ▼	31%	33%	32%
South	22%	23%	23%	21%
Less than 5 million JPY	30%	26%	29%	25%
5 – 9.99 million JPY	40%	44%	41%	49% ▲
10 million JPY or more	27%	26%	27%	24%
Prefer not to say	3%	3%	3%	1%
SINK / DINK	34%	30%	34%	29%
Family (dependent children)	36%	43% ▲	37%	50% ▲
Family (independent children)	30%	28%	29%	21% ▼

1. Sample size: Spring n = 246 | Summer n = 313 | Autumn n = 263 | Winter n = 123

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

Compared to peak-only considerers, off-peak considerers skews towards females and those aged 30-39 years

Profile of off-peak considerers

AC Monitor | Current 5M | Off-Peak Considerers

	Off-peak considerers	Peak-only considerers
Male	57% ▼	67%
Female	42% ▲	33%
Gender diverse	1%	0%
18 to 29 yrs	26%	24%
30 to 39 yrs	33% ▲	19%
40 to 49 yrs	17%	18%
50 to 59 yrs	11% ▼	20%
60 to 74 yrs	14%	18%
North	7%	9%
Kanto	40%	35%
Central	34%	37%
South	20%	20%
Less than 5 million JPY	28%	29%
5 – 9.99 million JPY	41%	42%
10 million JPY or more	28%	22%
Prefer not to say	3% ▼	7%
SINK / DINK	33%	33%
Family (dependent children)	40%	34%
Family (independent children)	27%	34%

1. Sample size: Off-Peak Considerers n = 502 | Peak-Only Considerers n = 248

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

The ability to drive off-peak arrivals among Japan ACs is sizeable at 68%, with autumn being the second most favoured season to summer

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%

Source for top 8 markets: AC Monitor | Online population aged 18-74 | Current 5M
Australia n = 751 | China n = 754 | USA n = 750 | UK n = 750 | Germany n = 751 | Japan n = 750 | India n = 751 | Singapore n = 750
Source for South Korea and Canada: Emerging Markets AC Monitor | Online population aged 18-74 | Q2 FY25 Wave | n = 300

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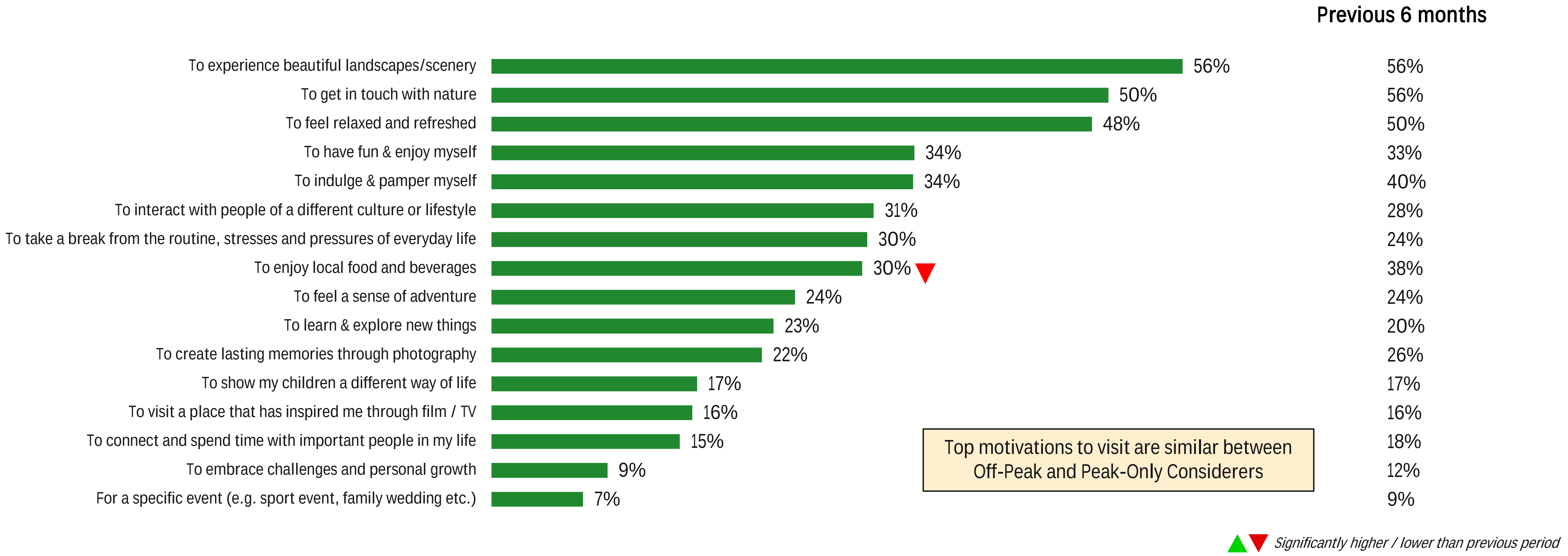
100% PURE NEW ZEALAND

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

Key motivations to visit New Zealand remain largely consistent except for opportunities to sample local food and beverages which has become less motivating

Reasons to visit New Zealand for a holiday

AC Monitor | Current 5M | Total Active Considerers

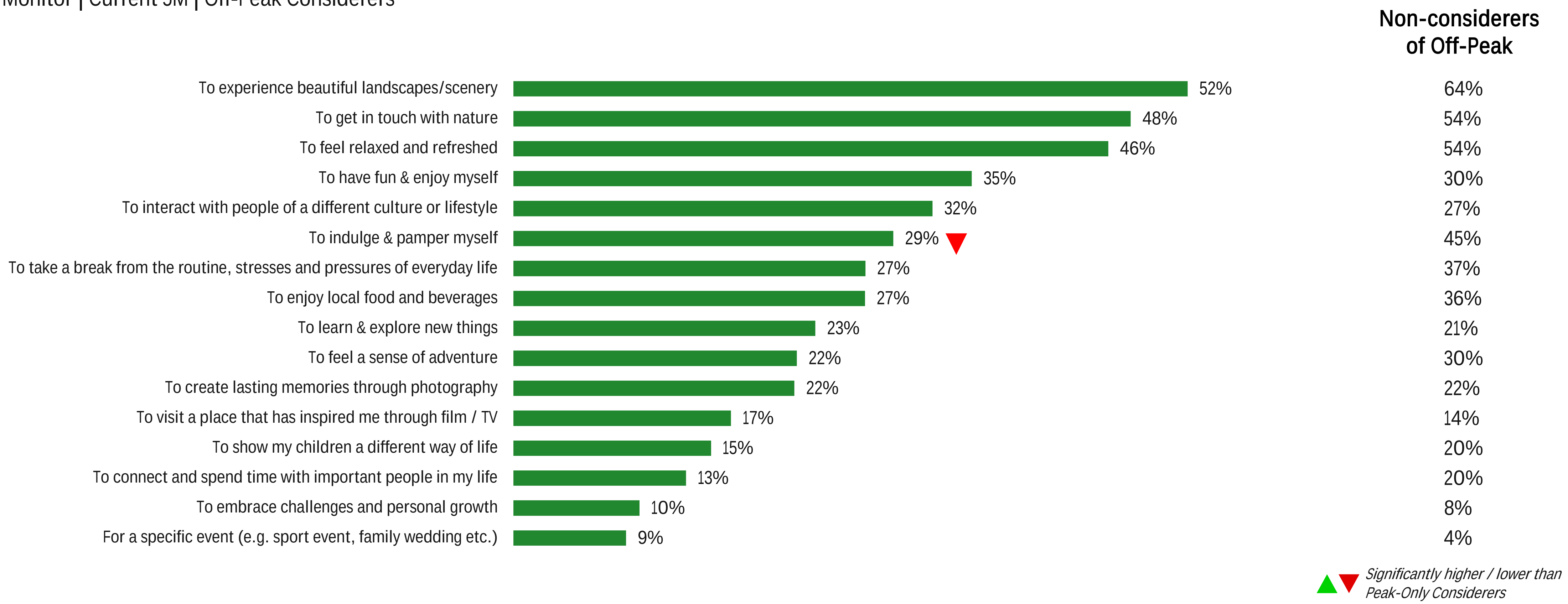


Sample size: Current 5M n = 300 | Previous 6M n = 450
Question "Why do you want to visit New Zealand for a holiday?"

Top motivations to visit are similar between off-peak and peak-only considerers hence similar marketing messages can be used; however, off-peak considerers are less motivated by indulgence

Reasons to visit New Zealand for a holiday

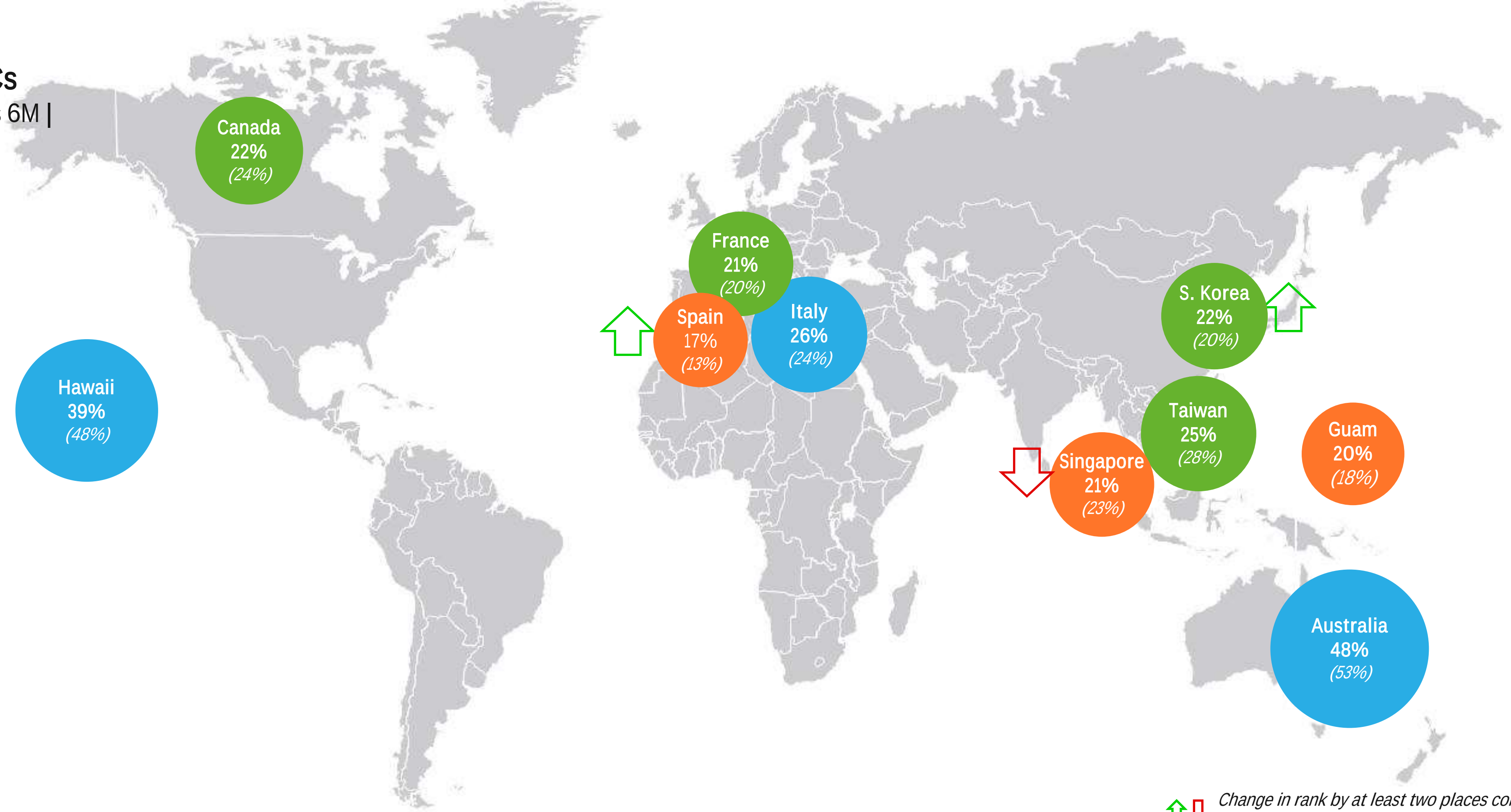
AC Monitor | Current 5M | Off-Peak Considerers



Sample size: Off-Peak Considerers n = 202 | Peak-Only Considerers n = 98
Question "Why do you want to visit New Zealand for a holiday?"

Based on preference, Australia and Hawaii are key competitors to watch, followed by Italy

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



Hong Kong moves out of the Top 10 Ranking

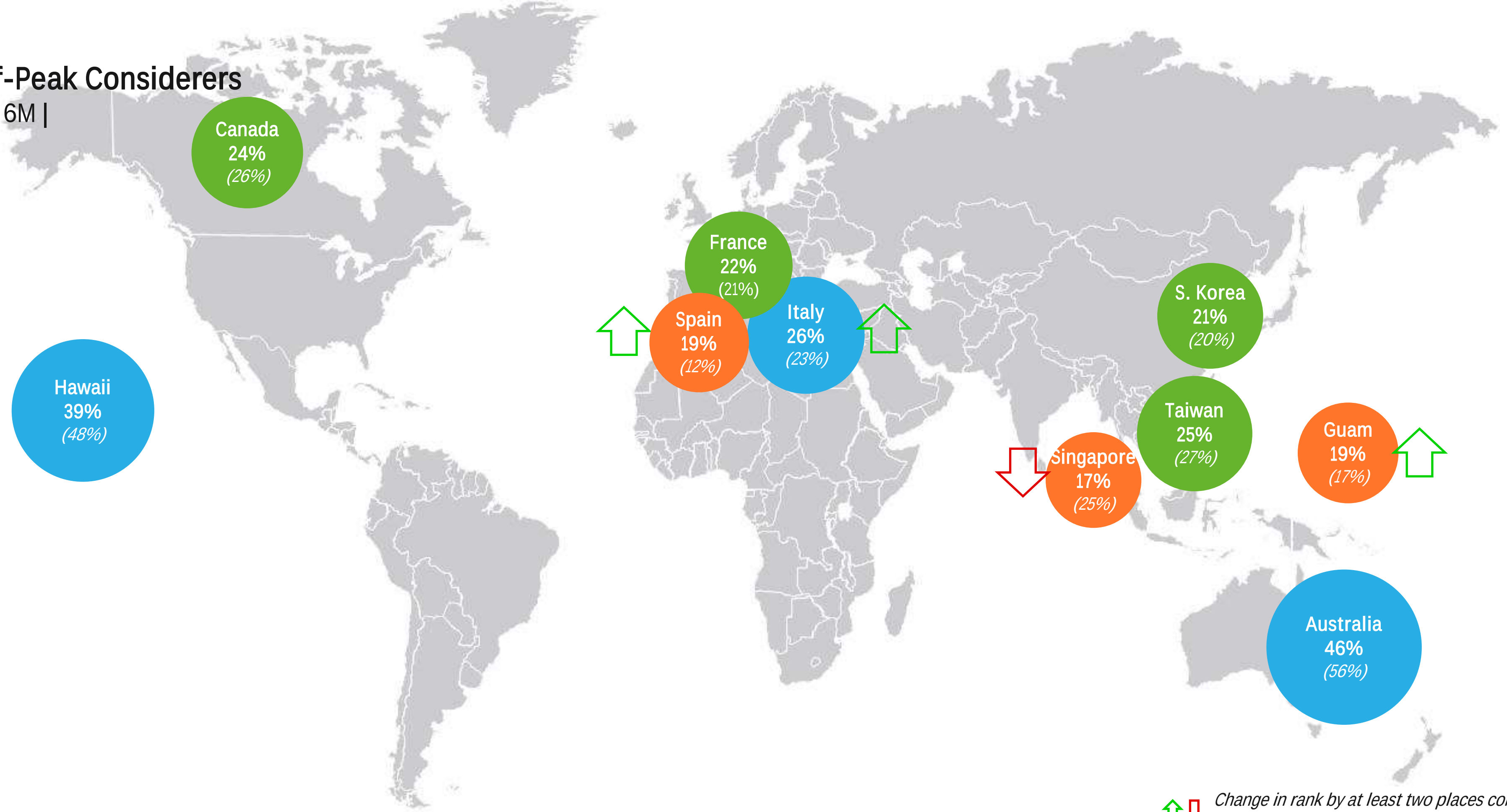
Legend
- Top 3
- Rank 4-7
- Rank 8-10

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

1. Sample size: Current 5M n = 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?”

As with ACs as a whole, the top 3 competitors to watch among off-peak considerers are Australia, Hawaii and Italy

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



Hong Kong has dropped out of the Top 10 into 13th position

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

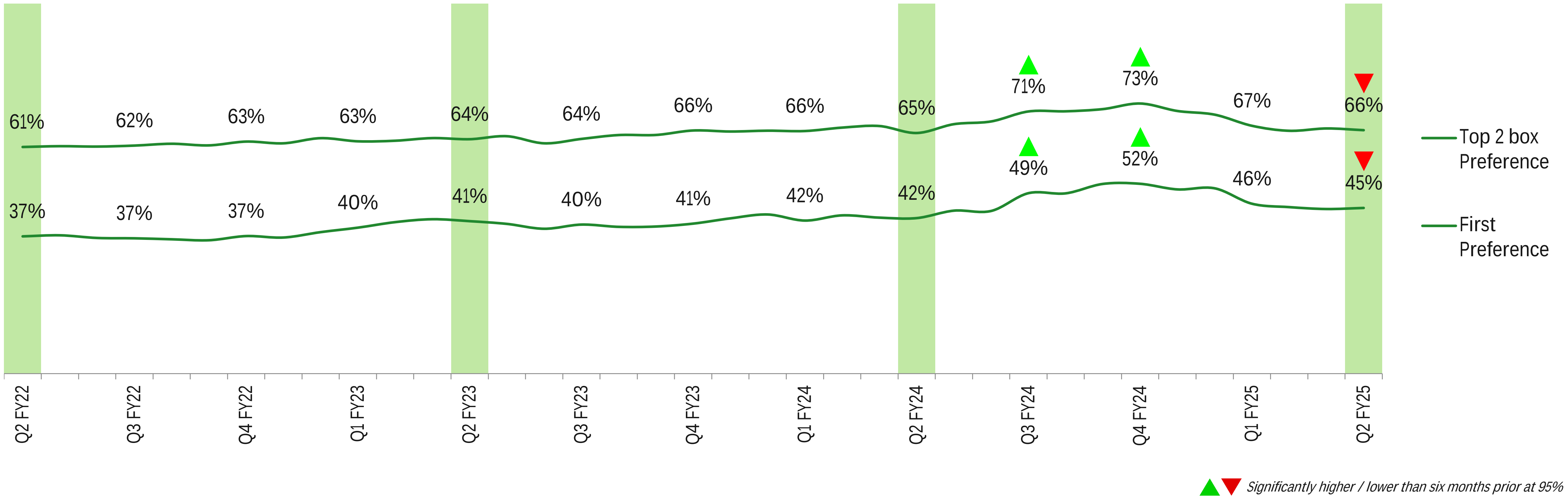
Change in rank by at least two places compared to 6 months ago

1. Sample size: Current 5M n = 625; Previous 6 months n =502
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?”

Within the last year, first-choice preference for New Zealand saw some significant growth which then slipped, but overall Q2 FY25 levels are up year on year

New Zealand Preference KPI

AC Monitor | 6MRA | Total Active Considerers

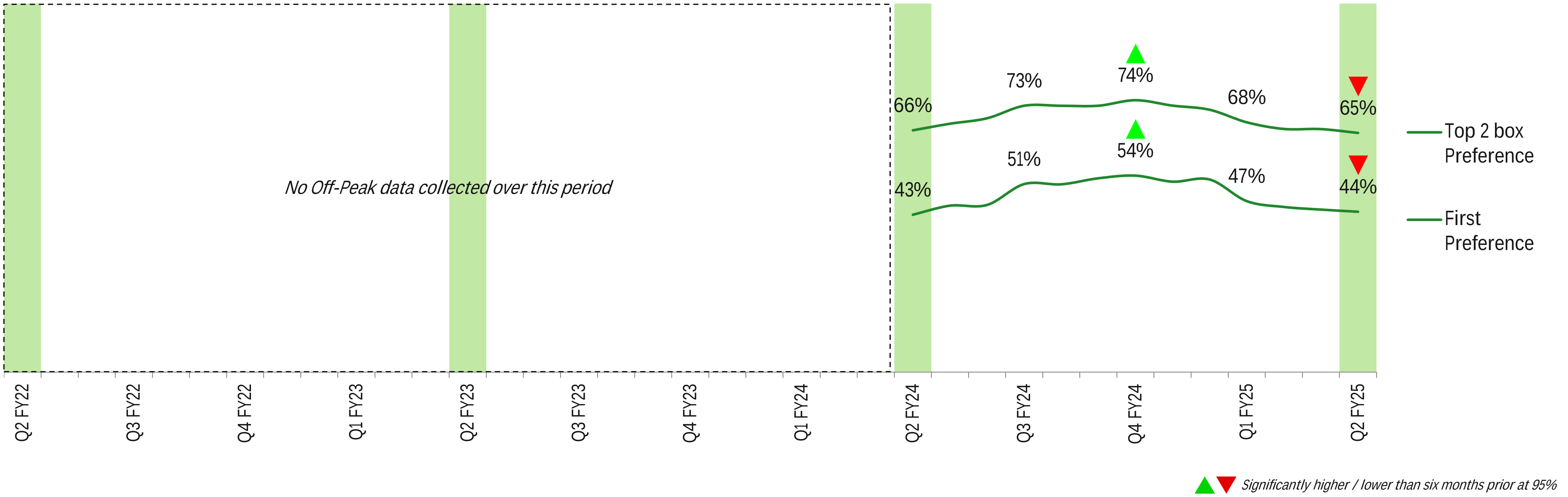


1. Sample size: Q2 FY22 – Q2 FY25 (6MRA) n = 901, 900, 900, 900, 900, 901, 901, 900, 900, 900, 900, 900, 750
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

Preference for New Zealand among off-peak considerers has returned to levels seen a year ago after a high in Q4 FY24

New Zealand Preference KPI for Off-Peak Considerers

AC Monitor | 6MRA | Off-Peak Considerers



1. Sample size: Q2 FY24 – Q2 FY25 (6MRA) n = 617, 623, 625, 604, 502
2. Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

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

Brand associations

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

Appendix: Brand associations 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 the ordinary	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

Context to preference driver analysis

Using Jaccard's analysis, we estimate which brand associations 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

New Zealand's indigenous culture, opportunities to escape the ordinary and ability to travel across all seasons emerge as stronger drivers of preference in 2024

Drivers of preference for New Zealand

AC Monitor | Rank | 2024 (Jul-Dec 24) | Total Active Considerers

	2024 rank	2023 rank	2022 rank[1]
Excitement	1	1	*
Wildlife experience	2	3	5
Landscapes & scenery	3	2	1
Indigenous culture	4 ⇧	16	13
Unique experiences	5	9 ⇧	14
Fun & enjoyment	6	4	4
Safe destination	7	11 ⇩	3
Local culture	8	10 ⇧	16
Relax & refresh	9	8 ⇩	2
Escape the ordinary	10 ⇧	18 ⇩	6
Range of adventure	11	7 ⇧	12
Range of experiences	12	12 ⇧	20
Clean & unpolluted	13 ⇩	5	8
Friendly people	14	17	10
All seasons	15 ⇧	22	24

	2024 rank	2023 rank	2022 rank[1]
Family friendly	16	14	18
Iconic attractions	17	13	25
Interesting cities	18	19	22
Amazing beaches	19	21	*
Quality food & wine	20	20	21
Relationship with the land	21	24	27
Easy to travel around	22	23 ⇧	28
Affordable activities	23	25 ⇧	30
Affordable to fly to	24	26 ⇧	31

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 five or more places*

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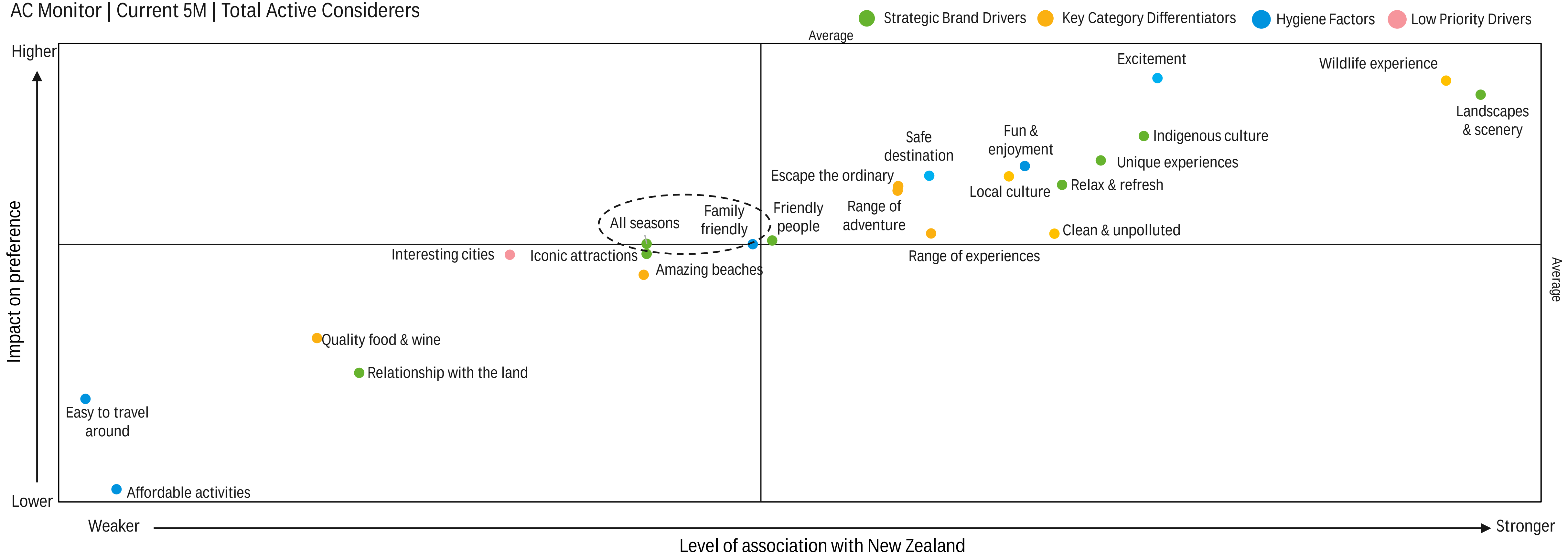
100% PURE NEW ZEALAND

New Zealand is strongly associated with most high impact drivers, except for suitability to travel across all seasons and family friendliness where there is an opportunity to boost performance

Brand Associations of New Zealand x Impact on preference

AC Monitor | Current 5M | Total Active Considerers



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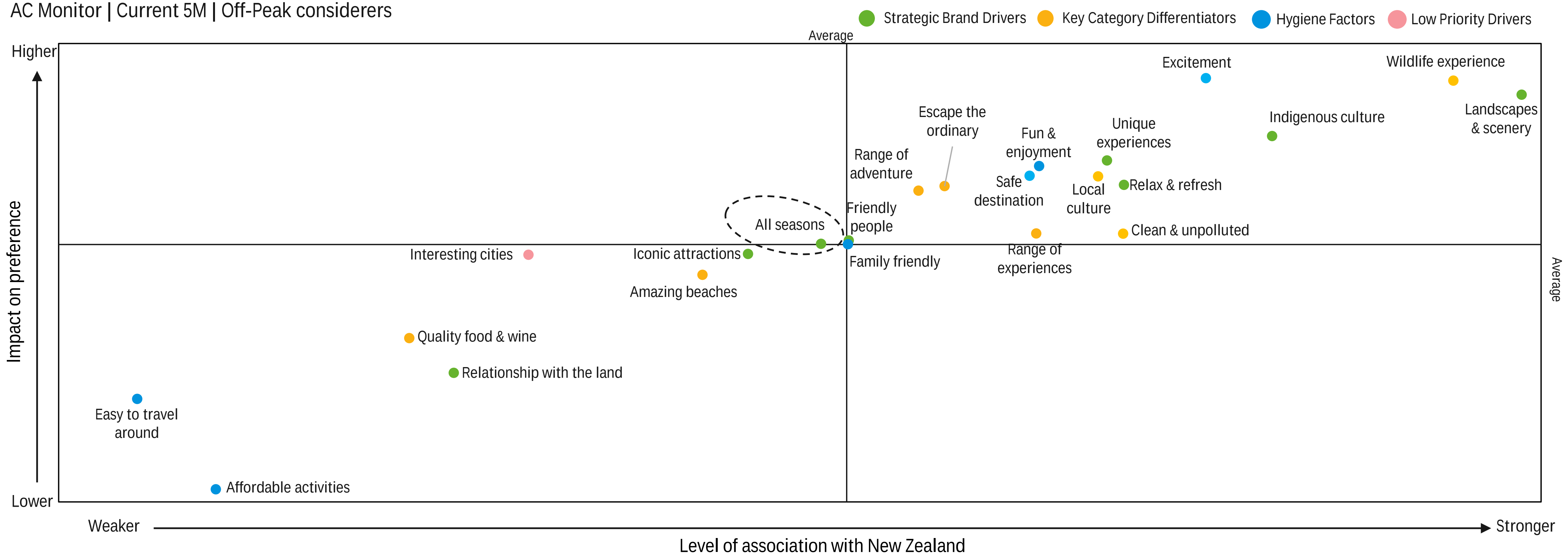
1. Sample size: n = 750
2. Question: "Which destinations, if any, do you associate with this statement?"
3. 'Affordable to fly to' driver not included due to low impact and level of association

100% PURE NEW ZEALAND

As with ACs as a whole, there is an opportunity to boost perceptions of all seasons among off-peak considerers

Brand Associations of New Zealand x Impact on preference | off-peak considerers

AC Monitor | Current 5M | Off-Peak considerers



1. Sample size: n = 502
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

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100% PURE NEW ZEALAND

New Zealand's key competitive strengths include its landscapes & scenery, indigenous culture, wildlife and cleanliness – focus on leveraging these aspects while building perceptions of friendly people, all seasons and iconic attractions which are relative weaknesses for New Zealand

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	Australia	Hawaii	Italy	Taiwan	Canada
Strategic Brand Drivers	Landscapes & scenery	120	118	90	76	47	127
	Indigenous culture	130	137	97	59	74	62
	Unique experiences	107	104	93	115	76	103
	Relax & refresh	103	91	125	89	83	98
	Friendly people	96	87	117	72	148	84
	All seasons	90	101	125	86	130	64
	Iconic attractions	85	100	101	117	106	102
	Relationship with the land	103	89	97	104	86	126
Key Category Differentiators	Wildlife experience	126	131	82	51	34	150
	Escape the ordinary	100	89	108	107	82	117
	Local culture	105	112	69	140	97	82
	Range of adventure	105	126	104	77	63	106
	Range of experiences	100	106	85	118	80	115
	Clean & unpolluted	139	119	77	63	42	130
	Amazing beaches	98	124	168	70	42	55
	Quality food & wine	86	101	55	220	64	104

Actions for TNZ:

Strengths:

- Landscapes & scenery
- Indigenous culture
- Unique experiences
- Wildlife experiences
- Clean & unpolluted

Drivers to dial up:

- Friendly people
- All seasons
- Iconic attractions

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

100% PURE NEW ZEALAND

New Zealand performs less competitively on hygiene factors, most notably ease of travelling around and affordability to fly to

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	Australia	Hawaii	Italy	Taiwan	Canada
Hygiene Factors	Excitement	96	87	94	121	108	107
	Fun & enjoyment	93	89	107	115	111	93
	Safe destination	98	101	103	60	131	107
	Family friendly	95	91	131	74	103	100
	Easy to travel around	76	77	131	126	129	77
	Affordable activities	98	67	71	77	231	90
	Affordable to fly to	76	44	65	80	322	79
Low Priority	Interesting cities	80	91	81	160	108	109

Actions for TNZ:

Drivers to dial up:

- Fun & enjoyment
- Family friendly
- Easy to travel around
- Affordable to fly to

KANTAR

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

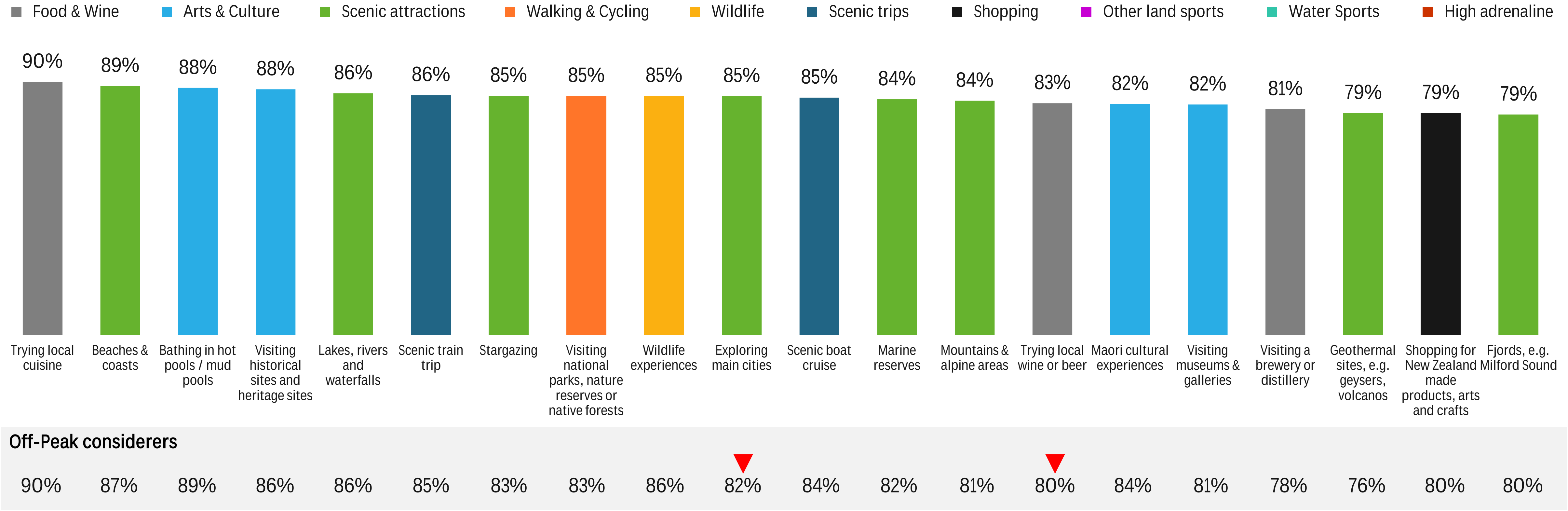
Relative weakness			100			*Relative strength*
Heat map shading is across rows, i.e. compares the six countries on that attribute						

100% PURE NEW ZEALAND

ACs have diverse interests, providing an opportunity to showcase those which can be done across off-peak seasons

Activities interested in doing in New Zealand (Top 20)

AC Monitor | Current 5M | Total Active Considerers



1. Sample size: Total ACs n = 300 | Off-Peak Considerers n = 202
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

7

How can TNZ maximise impact along consumer path to purchase?

Addressing concerns around safety from crime should be prioritised as a growing knowledge gap; other key knowledge gaps to address are related to the weather and how welcoming locals are

Top ten knowledge gaps

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

	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	How safe it is from crime	37% ▲	25%
2	What the weather is like	35%	37%
3	How welcoming the locals are	31%	30%
4	The quality and variety of food and beverage options	29%	28%
5	What / where the recommended things to see and do are	29%	27%
6	The length of time required to fly to New Zealand	28%	31%
7	How long it takes to travel between the main attractions	27%	27%
8	The length of time needed to experience New Zealand properly	25%	22%
9	What the best time of year is to do the activities I want to	25%	NA
10	Where I should get information about organising a holiday	23%	25%

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

1. Sample size: Current 5M n = 450 | 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?"

Messaging around the weather, the best time of year to do key activities and length of visit becomes more important further along the AC journey funnel

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	How safe it is from crime	39%	40%	Low sample size	32%
2	What the weather is like	32%	29%		43% ▲
3	How welcoming the locals are	26%	31%		37%
4	The quality and variety of food and beverage options	29%	33%		28%
5	What / where the recommended things to see and do are	26%	31%		32%
6	The length of time required to fly to New Zealand	31%	27%		28%
7	How long it takes to travel between the main attractions	25%	28%		25%
8	The length of time needed to experience New Zealand properly	18% ▼	23%		35% ▲
9	What the best time of year is to do the activities I want to	17% ▼	27%		31% ▲
10	Where I should get information about organising a holiday	14% ▼	29% ▲		24%

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

1. Sample size: Dreaming n = 166 | Discovering n = 150 | Planning n = 19 | Booking n = 115
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

Messaging around the best time of year to do desired activities should be of higher priority when targeting off-peak considerers

Top ten knowledge gaps for off-peak considerers

AC Monitor | Current 5M | Off-Peak Considerers

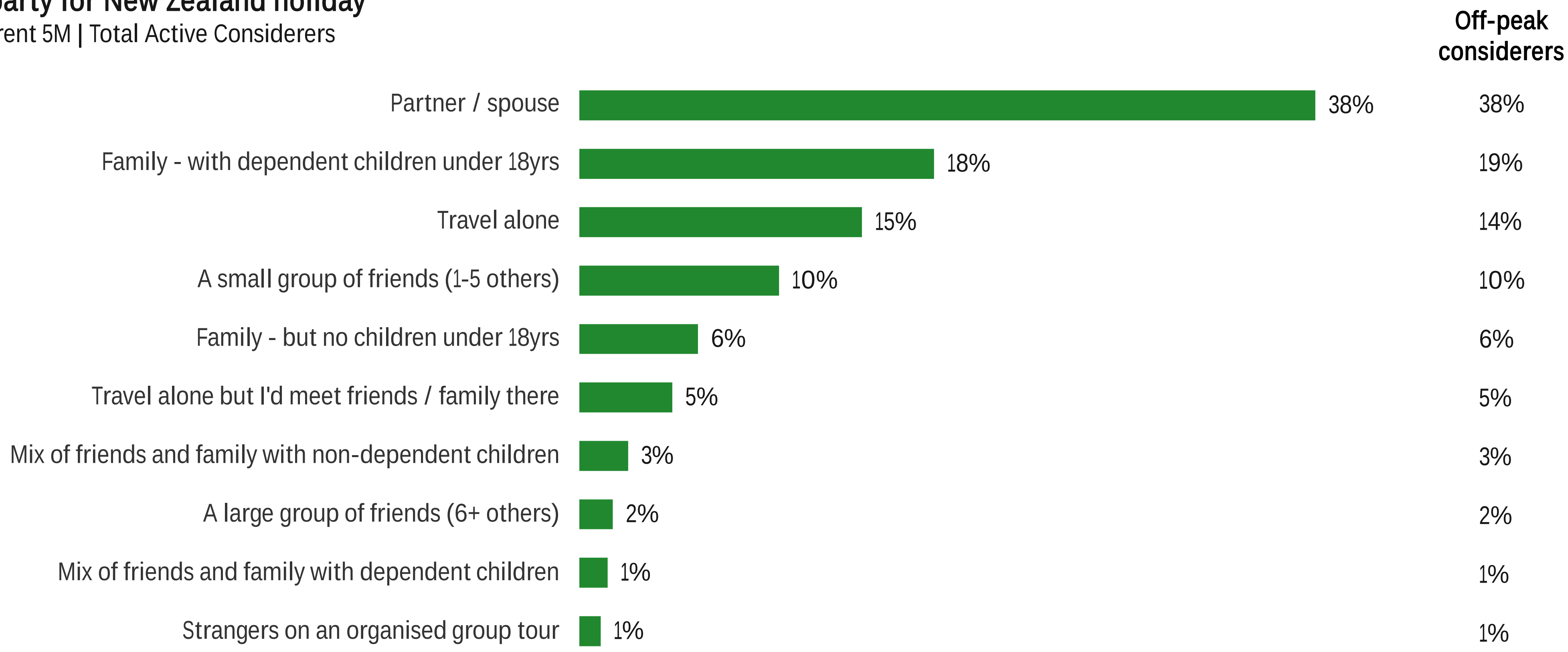
	What do ACs want to know more about before choosing New Zealand?	Off-peak considerers	Peak-only considerers
1	How safe it is from crime	39%	32%
2	What the weather is like	36%	32%
3	How welcoming the locals are	34%	26%
4	The quality and variety of food and beverage options	32%	24%
5	What / where the recommended things to see and do are	29%	29%
6	The length of time required to fly to New Zealand	29%	27%
7	How long it takes to travel between the main attractions	27%	26%
8	The length of time needed to experience New Zealand properly	28%	20%
9	What the best time of year is to do the activities I want to	28% ▲	19%
10	Where I should get information about organising a holiday	26%	19%

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

1. Sample size: Off-Peak Considerers n = 300 | Peak-Only Considerers n = 150
2. Question "Putting thoughts aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

ACs typically intend to travel to New Zealand with their partner or spouse, which is also true for off-peak considerers

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



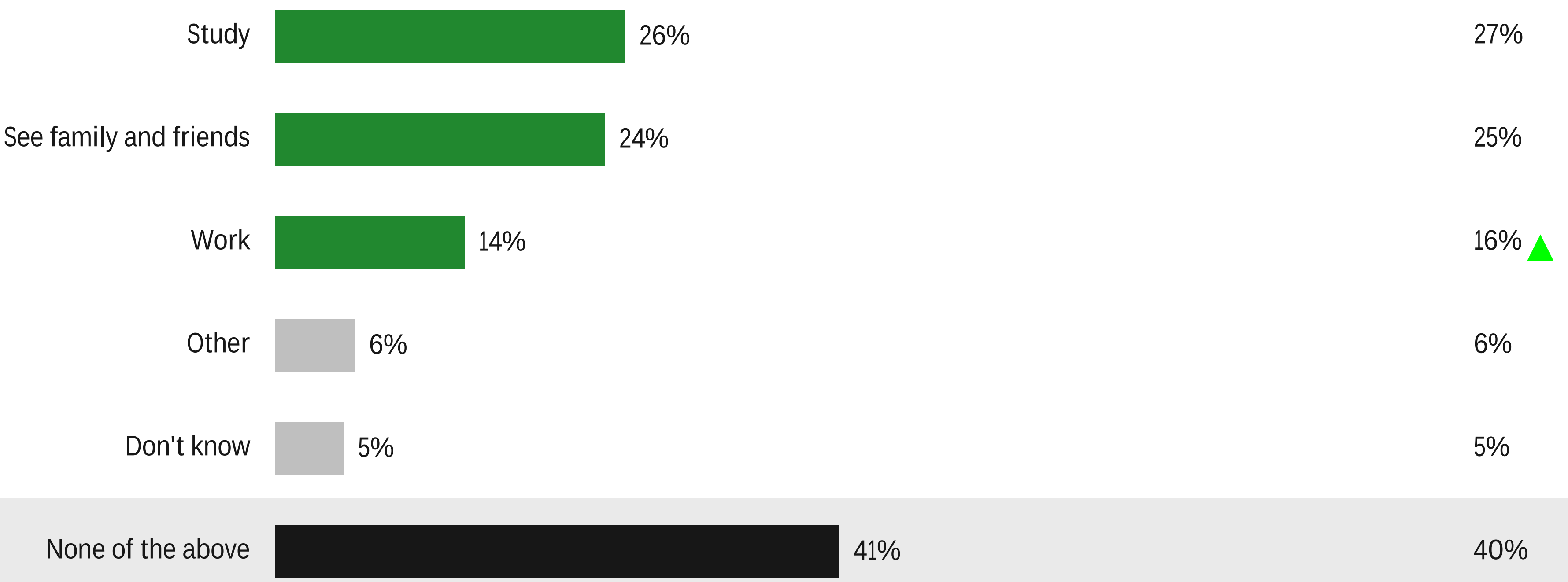
Significantly higher / lower than Peak-Only Considerers

1. Sample size: Total ACs n = 750 | Off-Peak Considerers n = 502
2. Question “Who are you most likely to travel with on your trip to New Zealand?”

Significant proportions of ACs intend to visit family and friends or study while on holiday; off-peak considerers are more likely to work while on holiday

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

Off-peak considerers



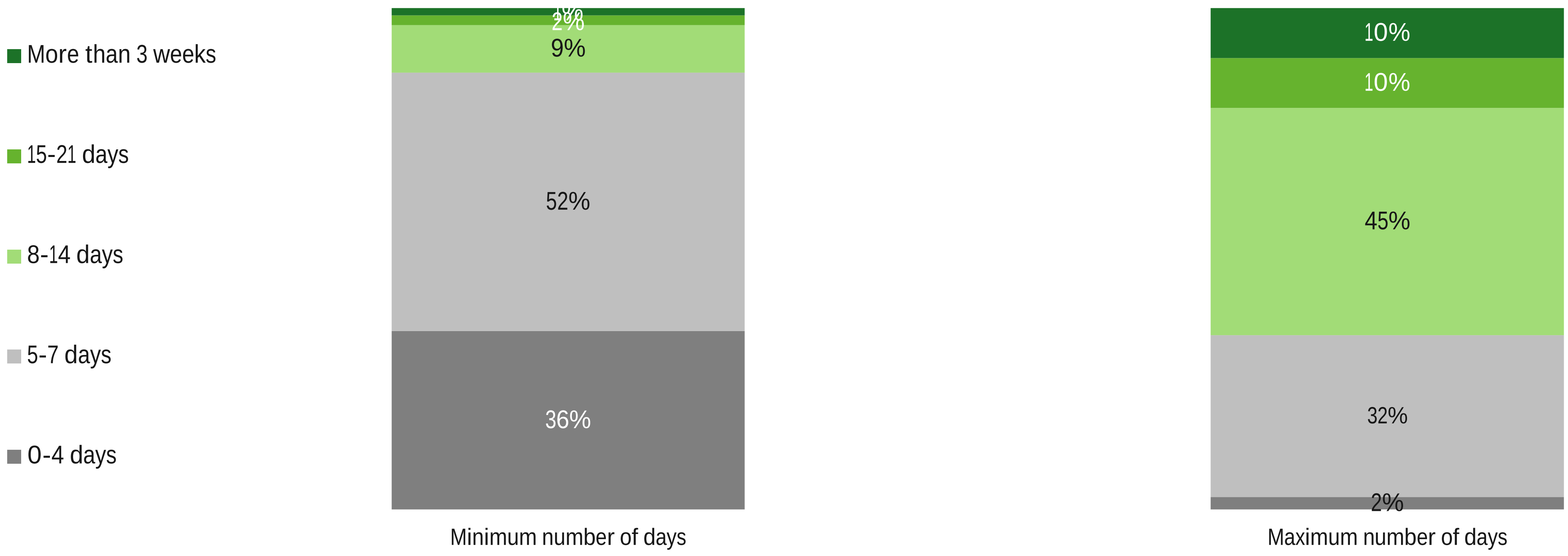
This represents ACs who are considering travelling to New Zealand for a holiday ONLY

Significantly higher / lower than Peak-Only Considerers

1. Sample size: Total ACs n = 750 | Off-Peak Considerers n = 502
2. Question "When considering travelling to New Zealand for a holiday, do you also intend to…"

Most ACs consider their ideal holiday in New Zealand to be no less than 5 days and no more than 14 days

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

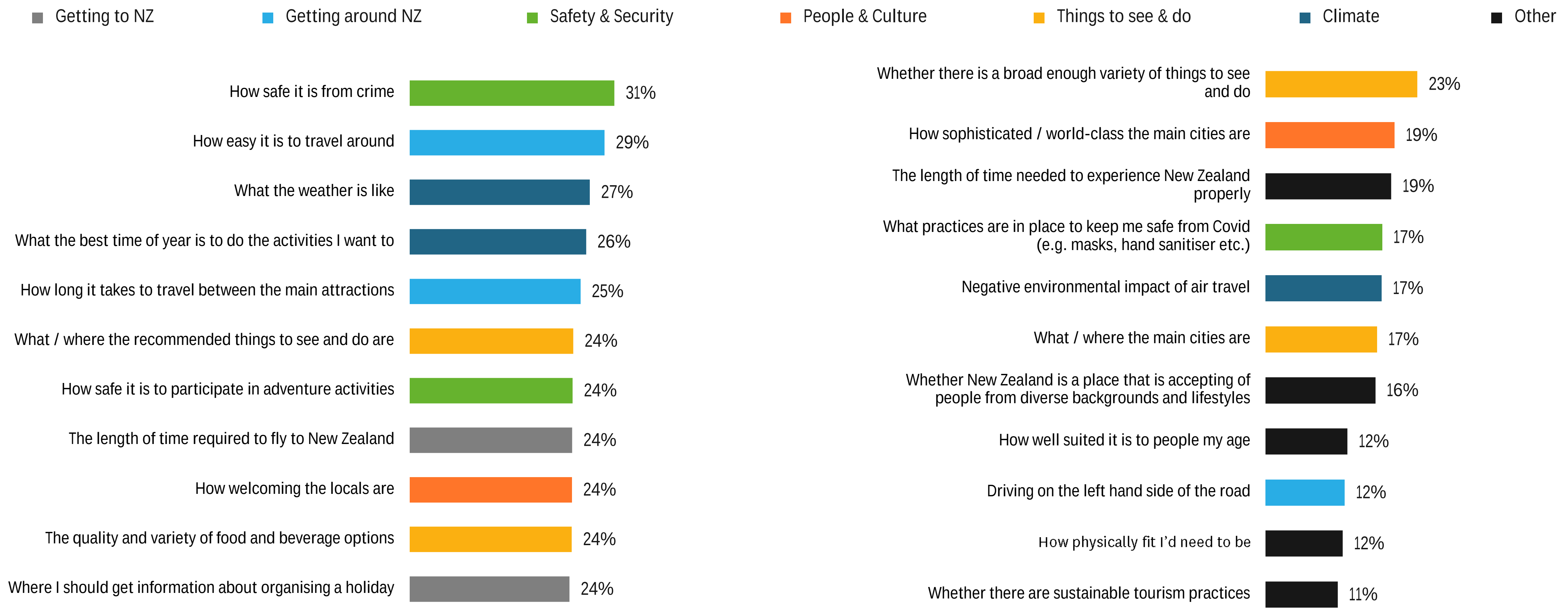


1. Sample size: Total ACs n = 750
2. Question "Thinking about a future holiday in New Zealand, what would be the minimum and maximum amount of time you would ideally spend in New Zealand?"

9 | Appendix

Knowledge gaps (full list)

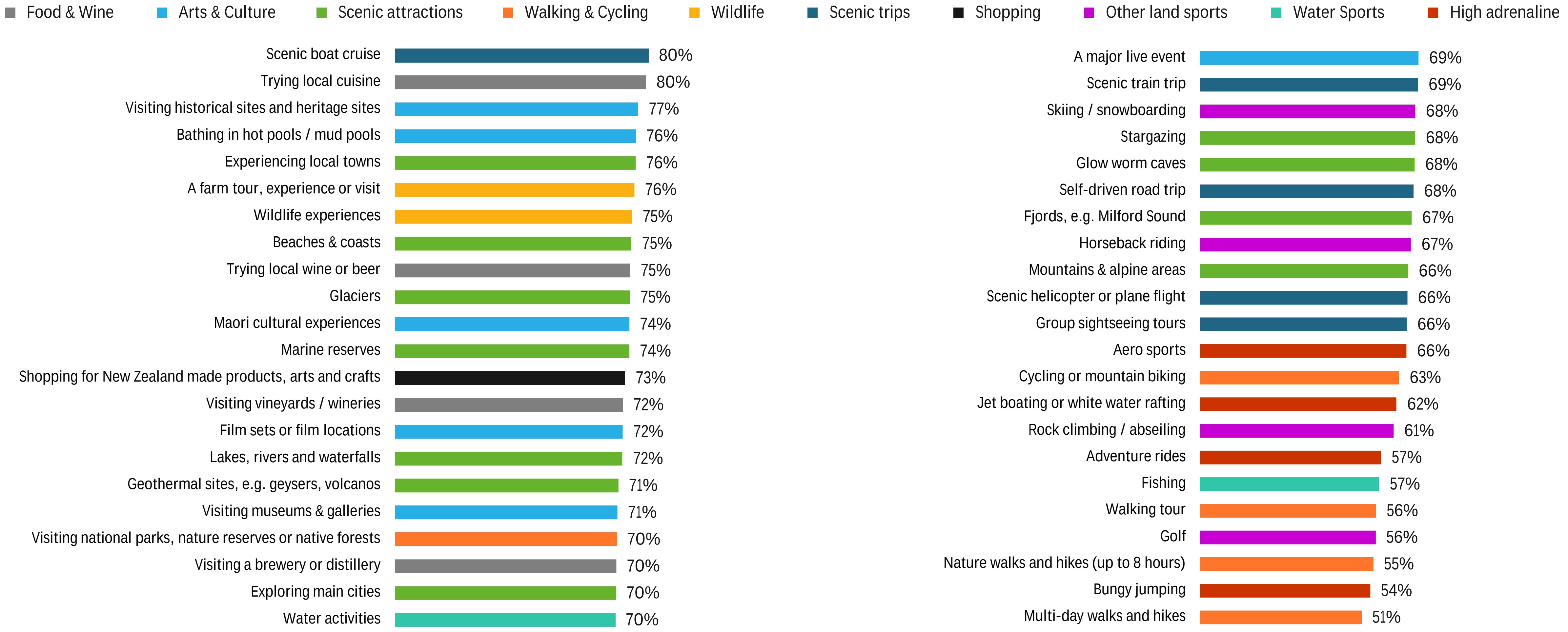
AC Monitor | Current 5M | Total Active Considerers



1. Sample size: Total ACs 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?"

Activities interested in doing in New Zealand (full list)

AC Monitor | Current 5M | Total Active Considerers



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1. Sample size: Total ACs n = 304
2. Question "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"

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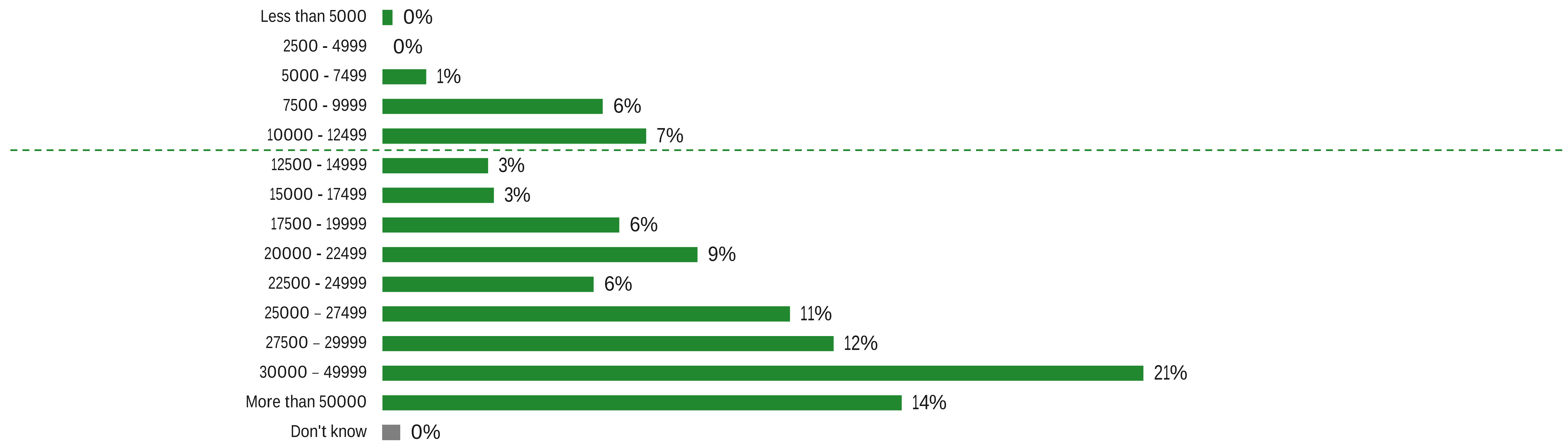
Of those who agree that New Zealand is a preferred destination, 15% do not meet the spend threshold of 12500 CNY

Spend on holiday in New Zealand among ACs

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

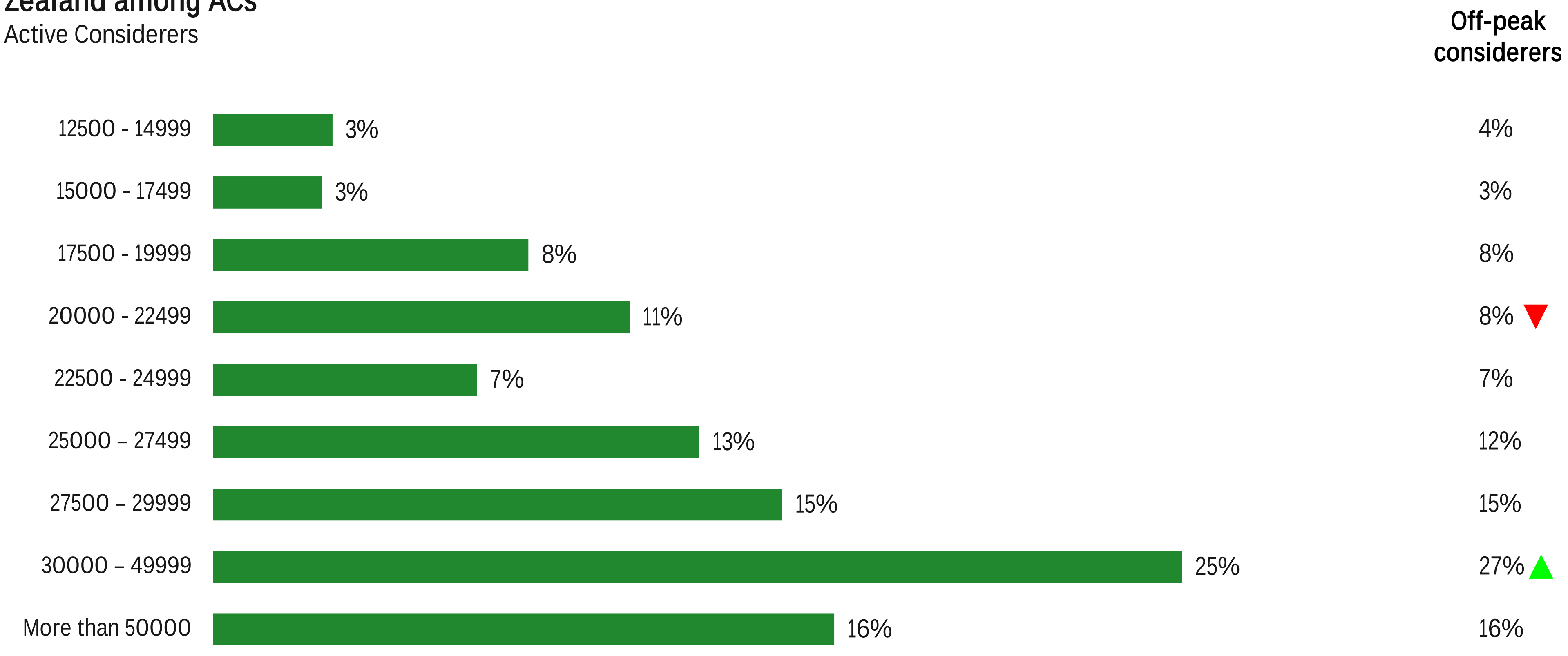


1. Sample size: n = 1129
2. Question "On a per person basis, how much would you be willing to spend on a holiday to New Zealand? Please include accommodation and daily expenses"

Among ACs, 41% would be willing to spend 30,000 CNY or more on a holiday in New Zealand, increasing to 43% of off-peak considerers

Spend on holiday in New Zealand among ACs

AC Monitor | Current 5M | Total Active Considerers



Significantly higher / lower than Off-Peak Considerers

1. Sample size: Total ACs n = 751 | Off-Peak Considerers n = 489
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"

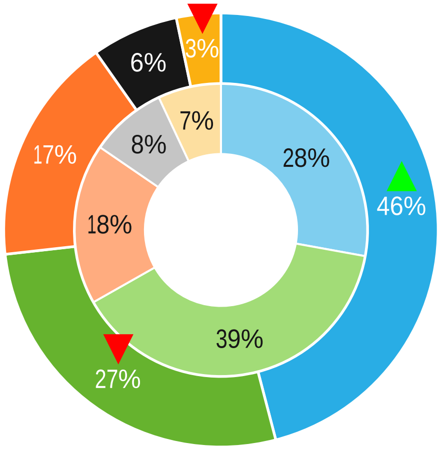
Compared to those who do not find New Zealand appealing, those who do skew towards those 18-29 years and from Changsha, Chengdu, Xian, Wuhan & Chongqing

Profile of those who find New Zealand highly appealing

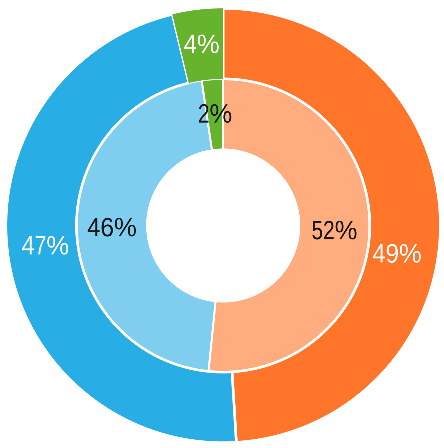
AC Monitor | Current 5M | % Among the online population aged 18-74

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

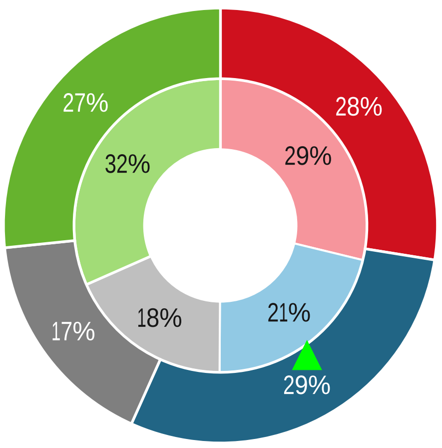
By age segment



By gender



By region



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

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1. Sample size: Those who find New Zealand highly appealing n = 1420 | Those who do not find New Zealand highly appealing n = 279

100% PURE NEW ZEALAND

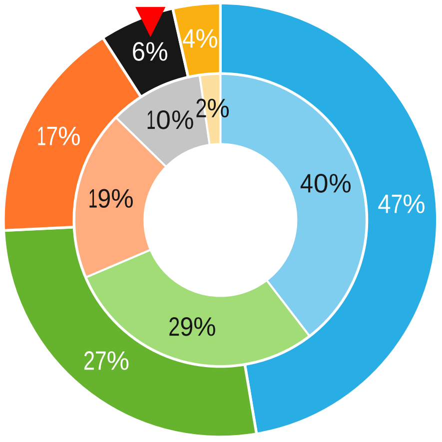
Compared to those who would not consider New Zealand, those who do skew away from those aged 50 – 59 years

Profile of those who would seriously consider visiting New Zealand

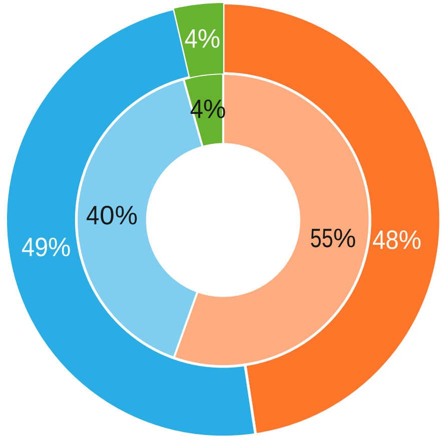
AC Monitor | Current 5M | % Among those who find New Zealand highly appealing

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

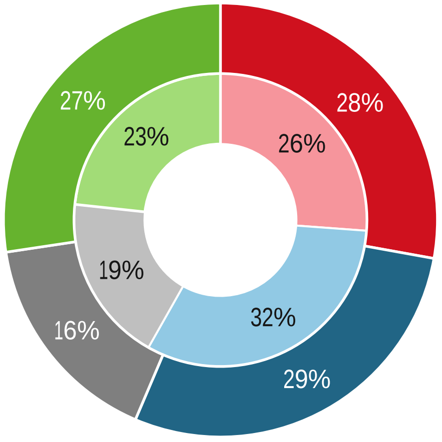
By age segment



By gender



By region

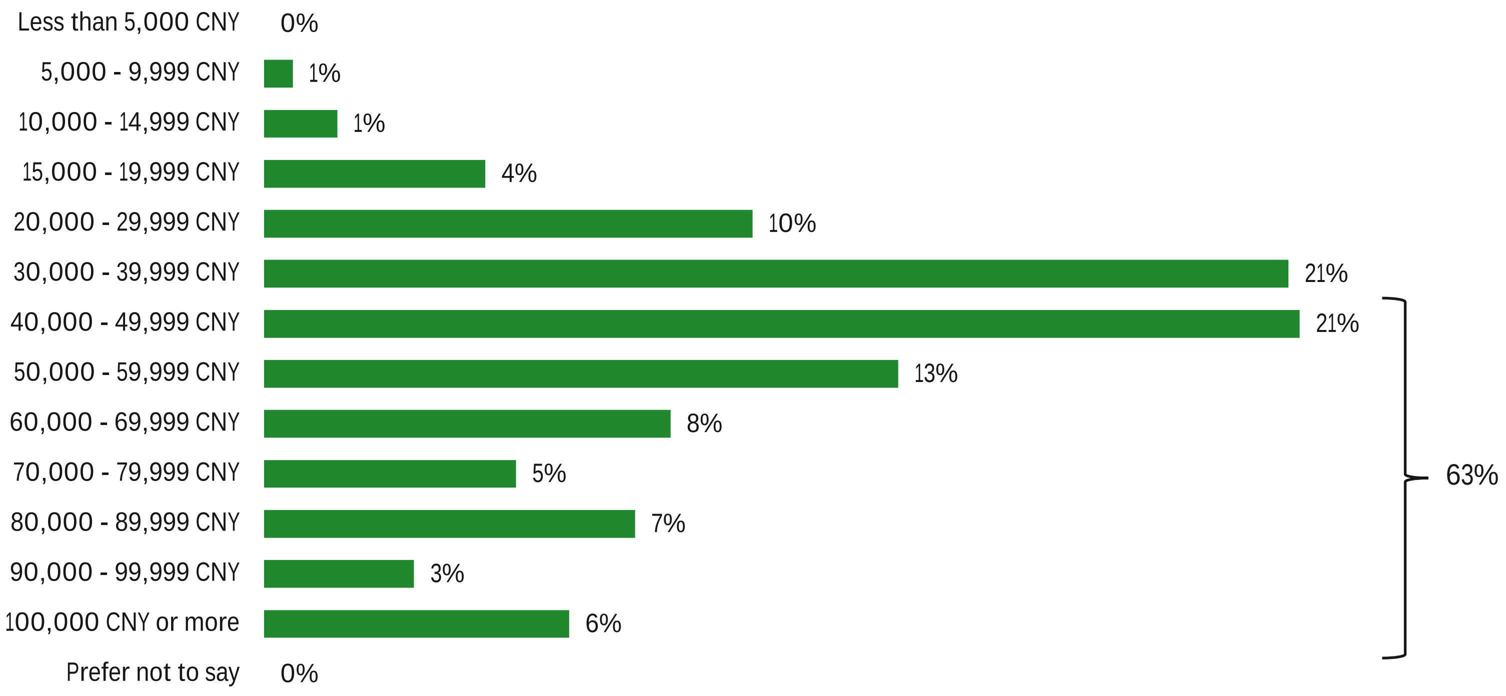


Significantly higher / lower than those who would not seriously consider

1. Sample size: Those who would seriously consider visiting New Zealand n = 1150 | Those who would not seriously consider visiting New Zealand n = 270

The majority of ACs have a monthly household income of 40,000 CNY or higher

Household Income (monthly)
AC Monitor | Current 5M | Total Active Considerers

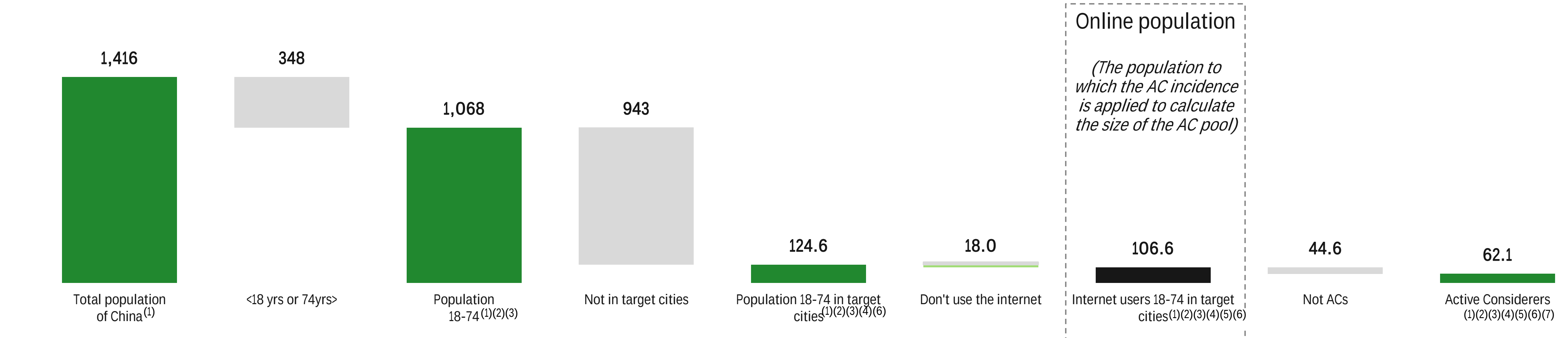


1. Sample size: Total ACs n = 754
2. Question "What is your total annual household income?"

Chinese Market Sizing

Nov 24 | Million people

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



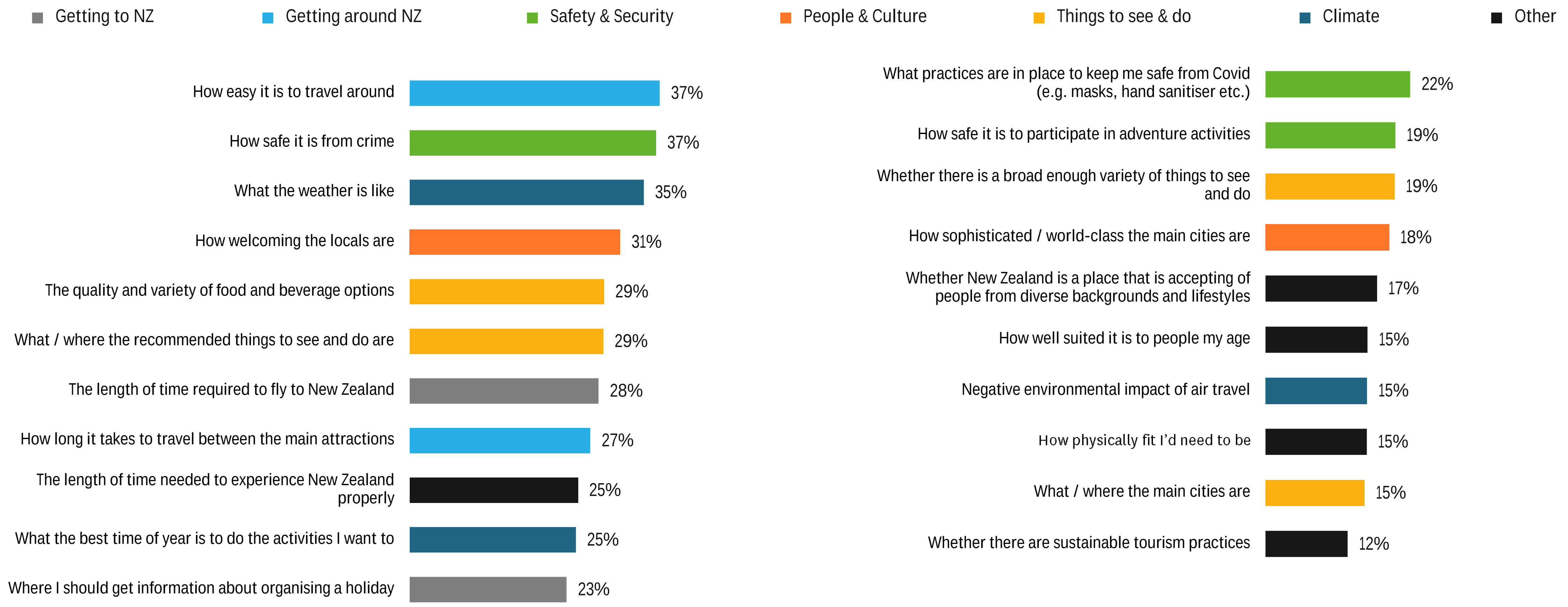
Dec 2023: 1,416 | 1,138 | 122.4 | 104.8 | 57.6

SOURCES/NOTES:

(1) United States Census Bureau, International Database , Total population by age and region; Time period: 2024; Coverage: All Chinese individuals, excludes Hong Kong, Macau and Taiwan
(2) Worldometer population clock, China; Time period as at November 2024
(3) PopulationStat, China: 2024; Coverage: Population of Chinese urban agglomerations
(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 2024; 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 2024, under the latest AC definition
(7) Kantar Analysis

Knowledge gaps (full list)

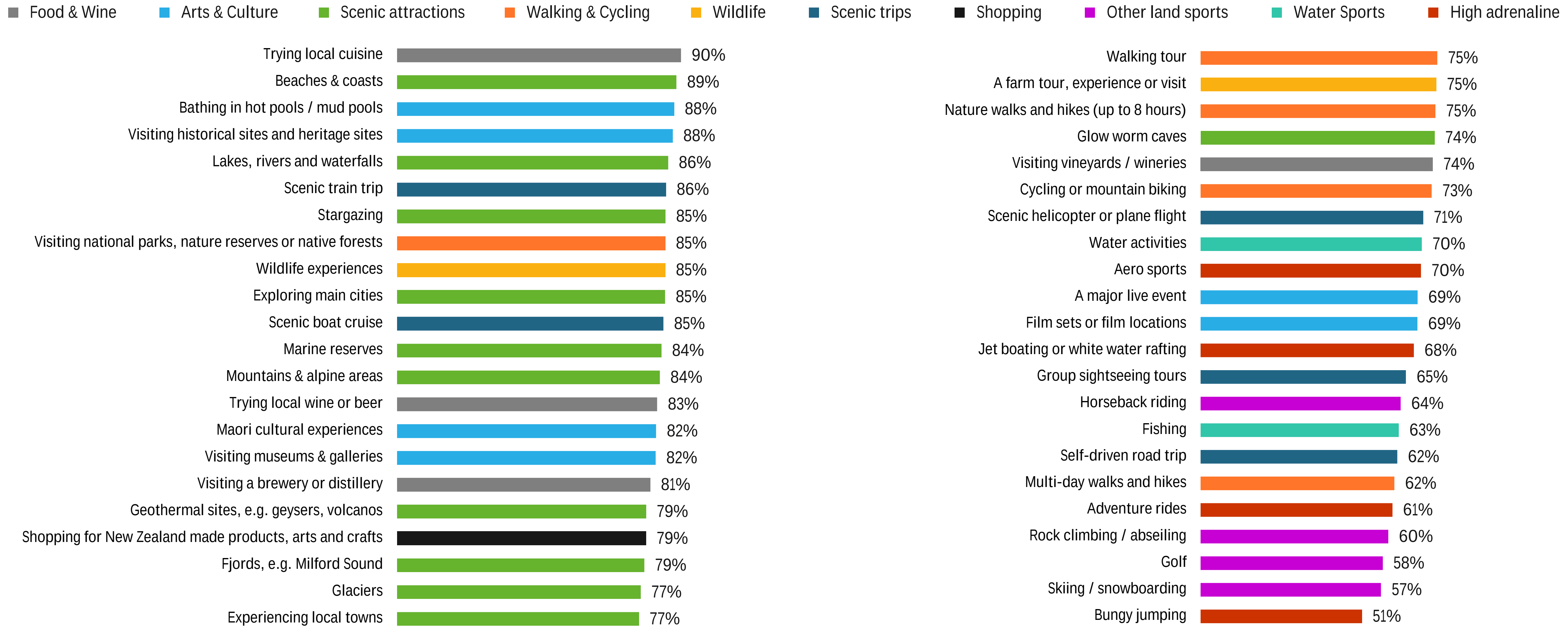
AC Monitor | Current 5M | Total Active Considerers



1. Sample size: Total ACs 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?"

Activities interested in doing in New Zealand (full list)

AC Monitor | Current 5M | Total Active Considerers



KANTAR

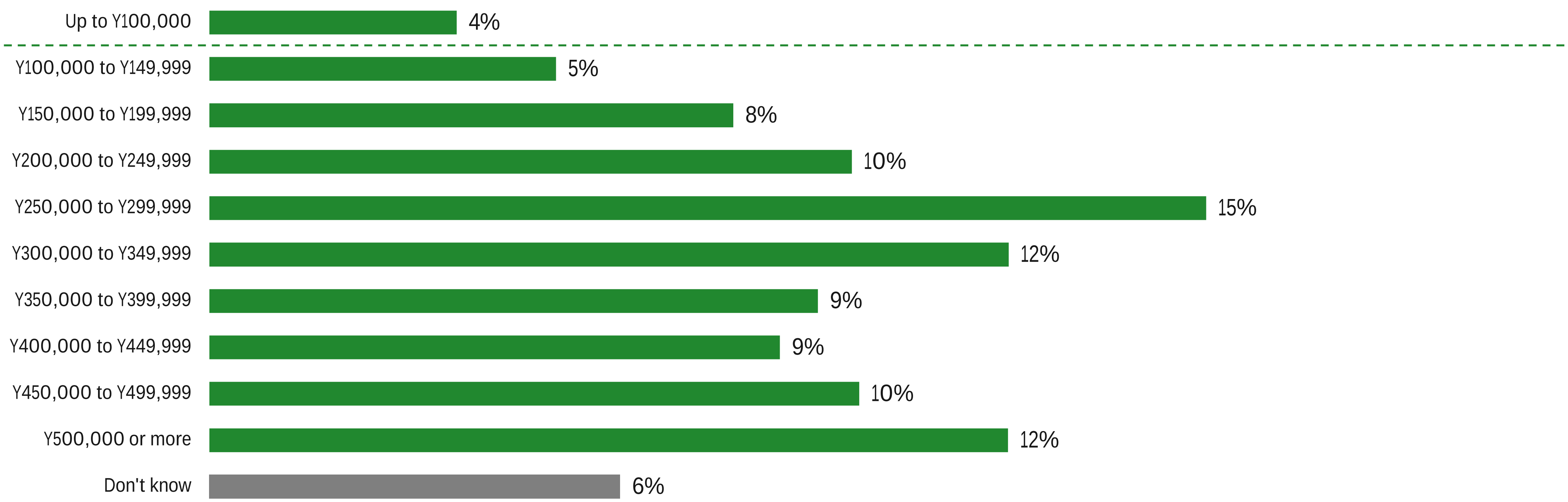
1. Sample size: Total ACs n = 300
2. Question "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"

100% PURE NEW ZEALAND

Of those who agree that New Zealand is a preferred destination, 4% do not meet the spend threshold of Y100000

Spend on holiday in New Zealand

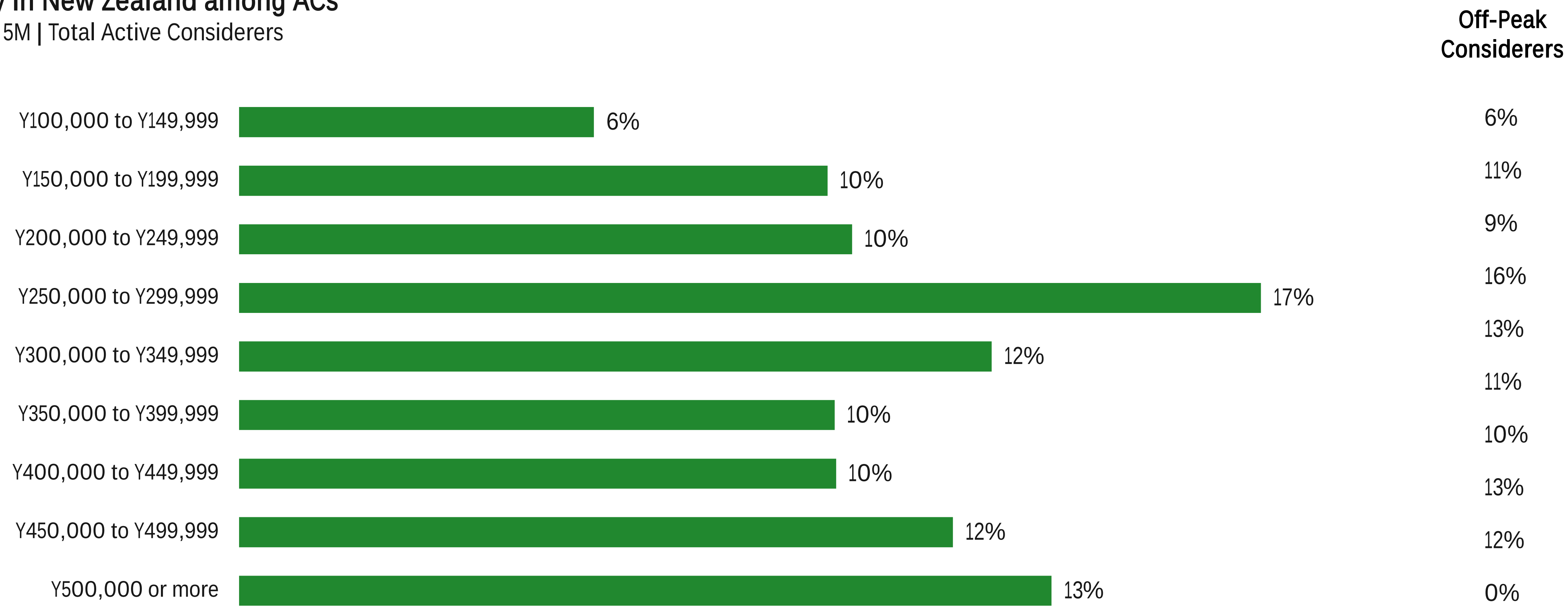
% Those who agree NZ is a preferred holiday destination | Current 5M



1. Sample size: n = 1032
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"

Among ACs, 57% would be willing to spend Y300,000 or more on a holiday in New Zealand

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



Significantly higher / lower than Off-Peak Considerers

1. Sample size: Total ACs n = 750 | Off-Peak Considerers n = 502
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"

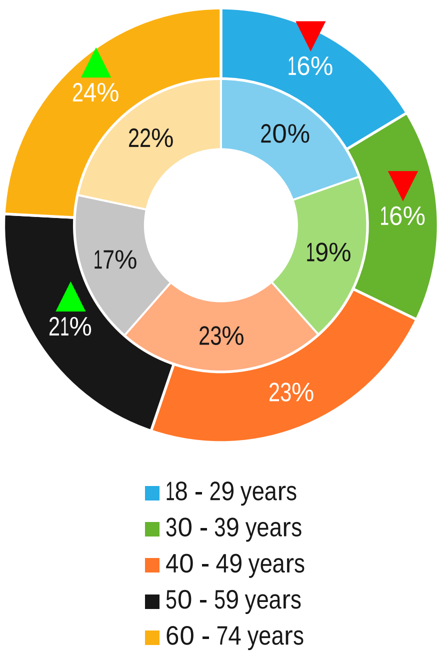
Compared to those who do not find New Zealand appealing, those who do skew towards those 50-74 years and from Kinki

Profile of those who find New Zealand highly appealing

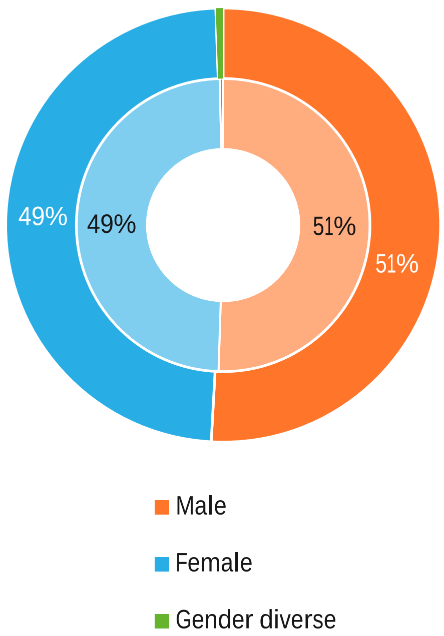
AC Monitor | Current 5M | % Among the online population aged 18-74

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

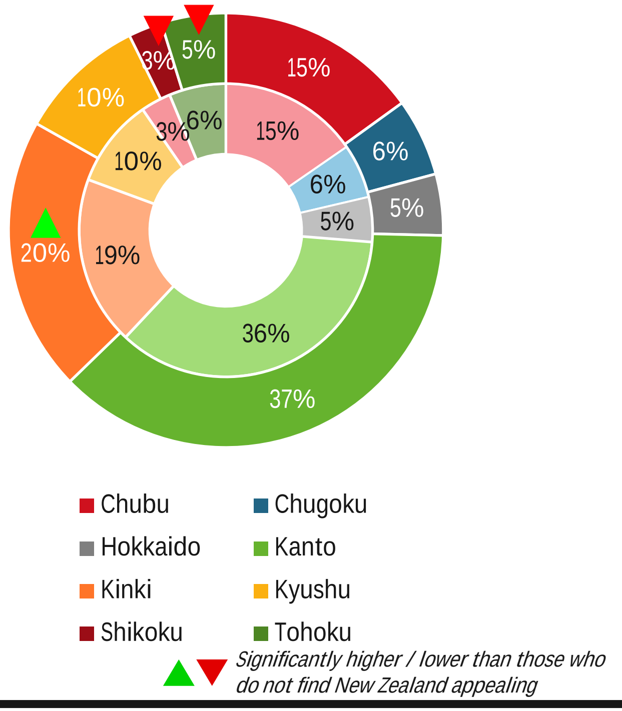
By age segment



By gender



By region



1. Sample size: Those who find New Zealand highly appealing n = 8068 | Those who do not find New Zealand highly appealing n = 17754

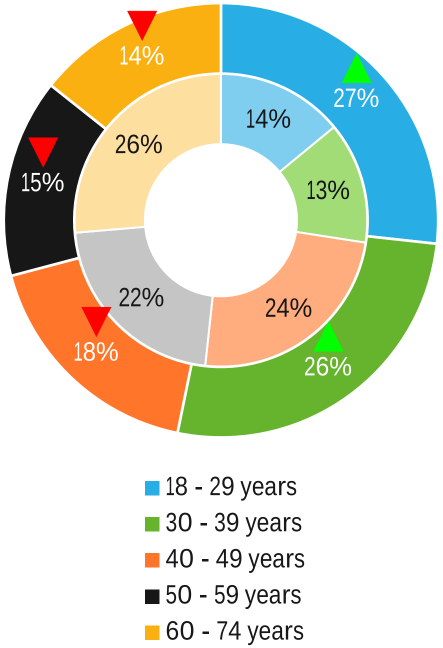
Compared to those who would not consider New Zealand, those who do skew towards males and those aged between 18-39 years

Profile of those who would seriously consider visiting New Zealand

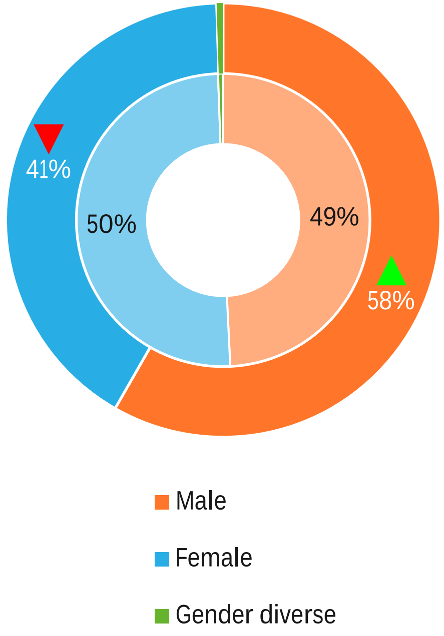
AC Monitor | Current 5M | Those who find New Zealand highly appealing

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

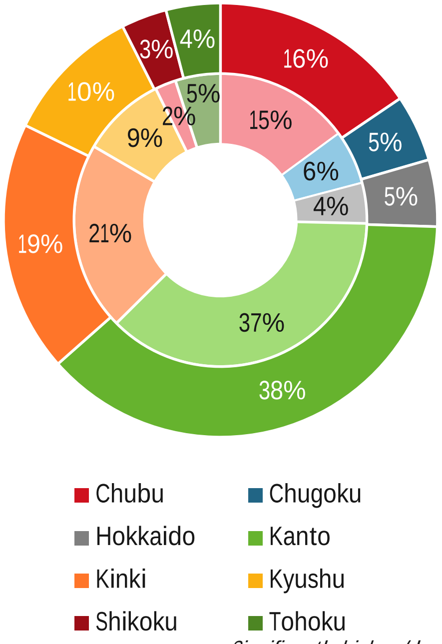
By age segment



By gender



By region



Significantly higher / lower than those who would not seriously consider

1. Sample size: Those who would seriously consider visiting New Zealand n = 1117 | Those who would not seriously consider visiting New Zealand n = 6951

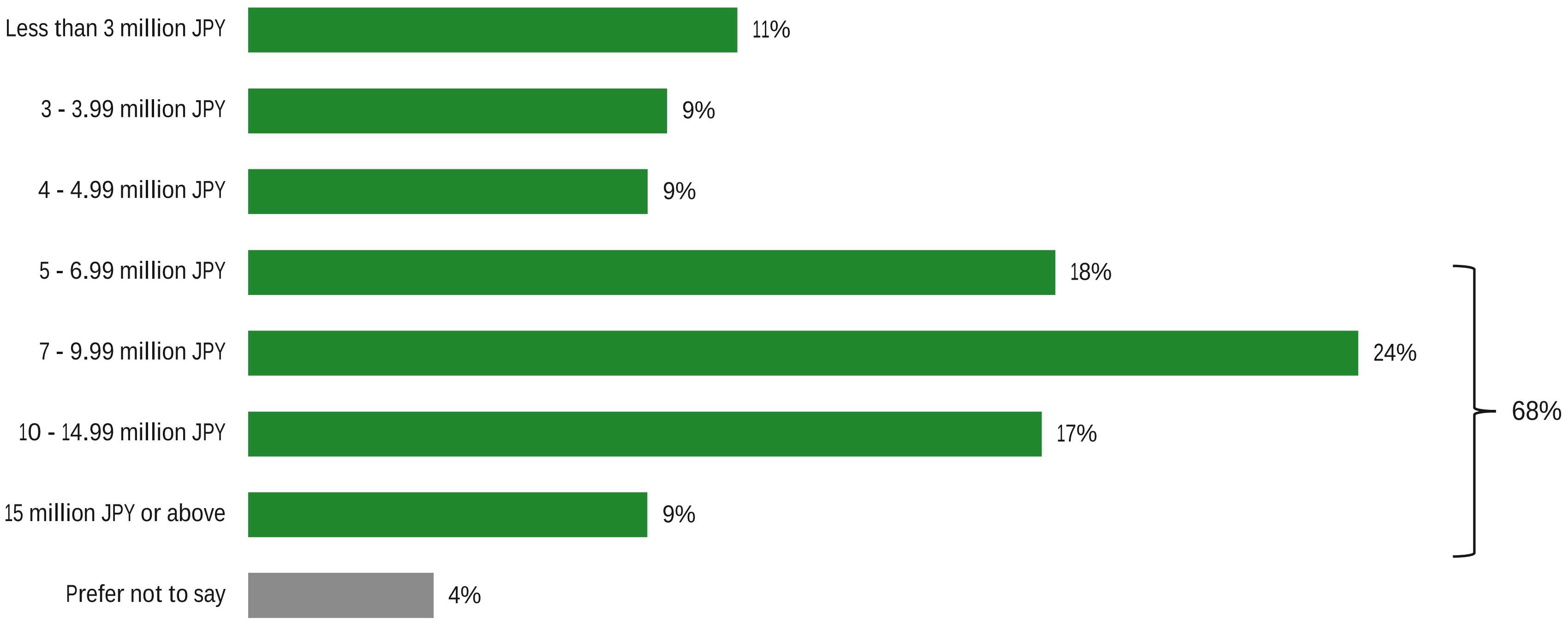
KANTAR

100% PURE NEW ZEALAND

The majority of ACs have a household income of 5 million JPY or higher

Household Income

AC Monitor | Current 5M | Total Active Considerers



1. Sample size: Total ACs n = 750
2. Question “What is your total annual household income?”

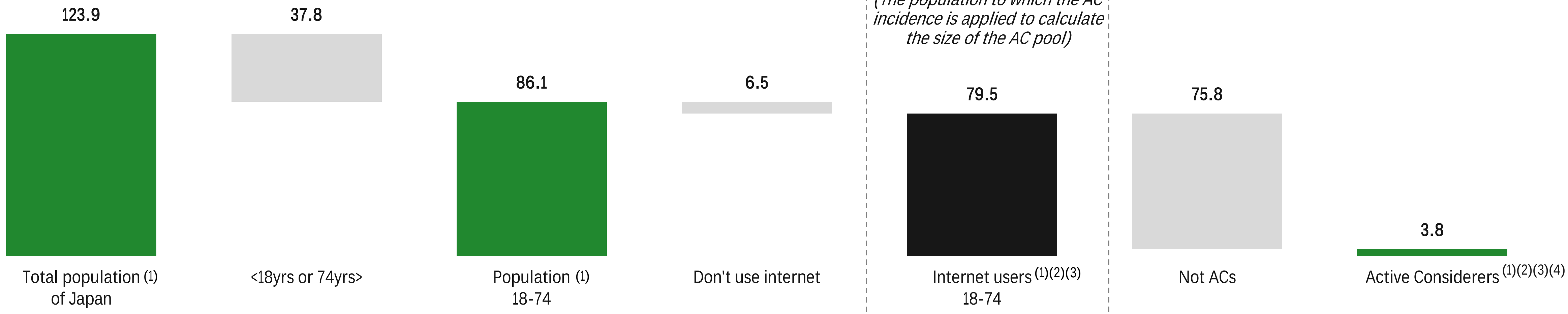
Japan Market Sizing

Nov 24 | Million people

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

Online population

(The population to which the AC incidence is applied to calculate the size of the AC pool)



Dec 2023:	Total population of Japan	Population 18-74	Internet users 18-74	Active Considerers
	124.2	86.6	80.0	5.2

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

Appendix: Brand positioning ‘how to’

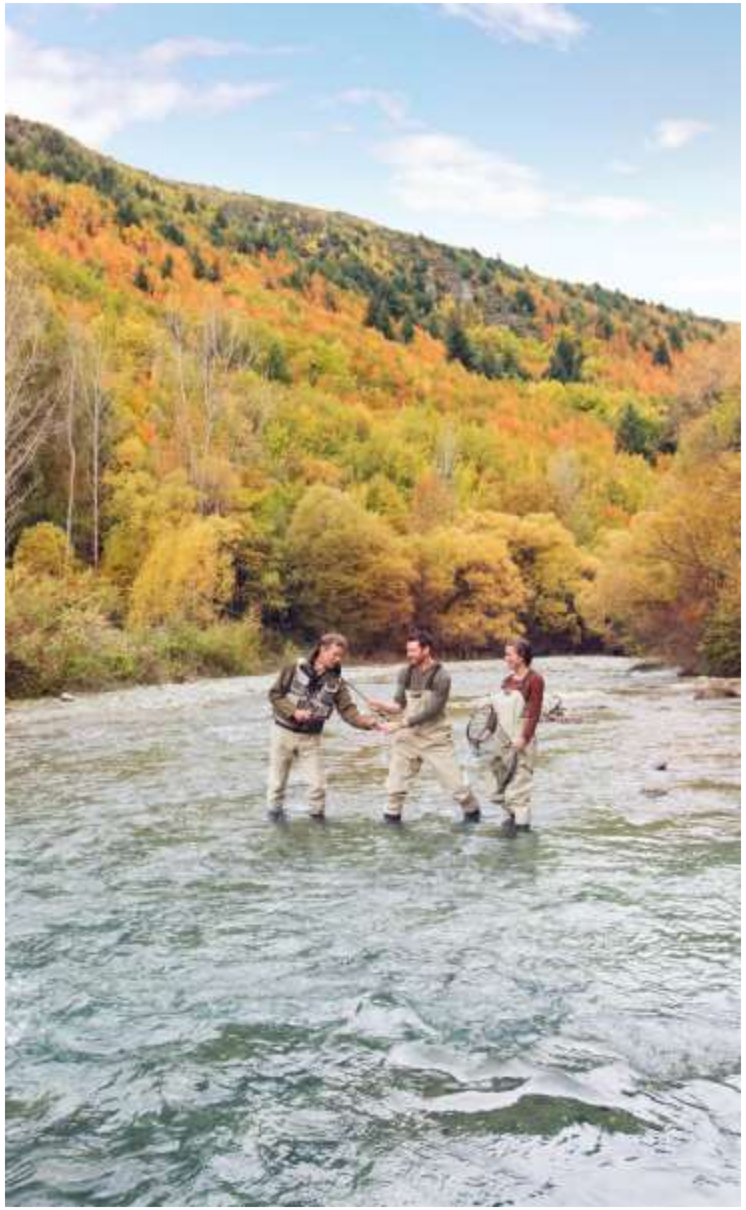
ACs are biased by their predisposition to New Zealand by design. Because we’re already talking to people that really like the idea of visiting New Zealand, New Zealand tends to get rated much more favourably on the brand attributes than competitors do. To better understand relative performance, we need 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: Visitor consideration funnel

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