



**KANTAR**

# Active Considerer (AC) Monitor Europe (H1 FY25)

Report

January 2025



**100% PURE  
NEW ZEALAND**  
newzealand.com

# AC Monitor research specifications

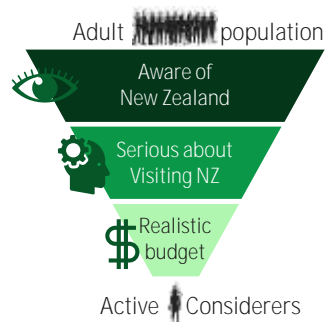


Kantar conducts a **monthly online survey** in each of Tourism New Zealand's six tier 1 & 2 markets:

- 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



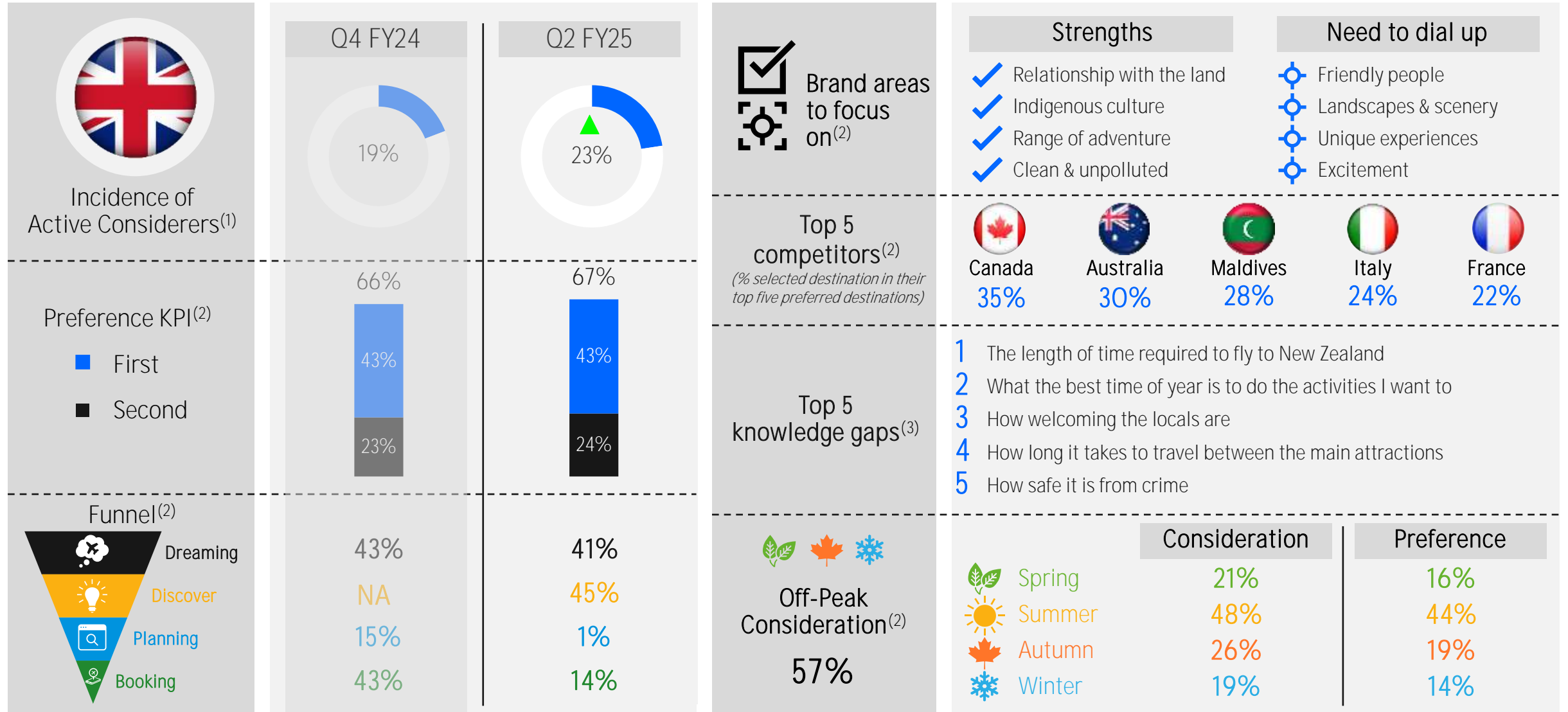
We survey **Active Considerers (ACs) of New Zealand**

- ACs are those who are aware of New Zealand, **serious** about visiting and who have a **realistic** budget

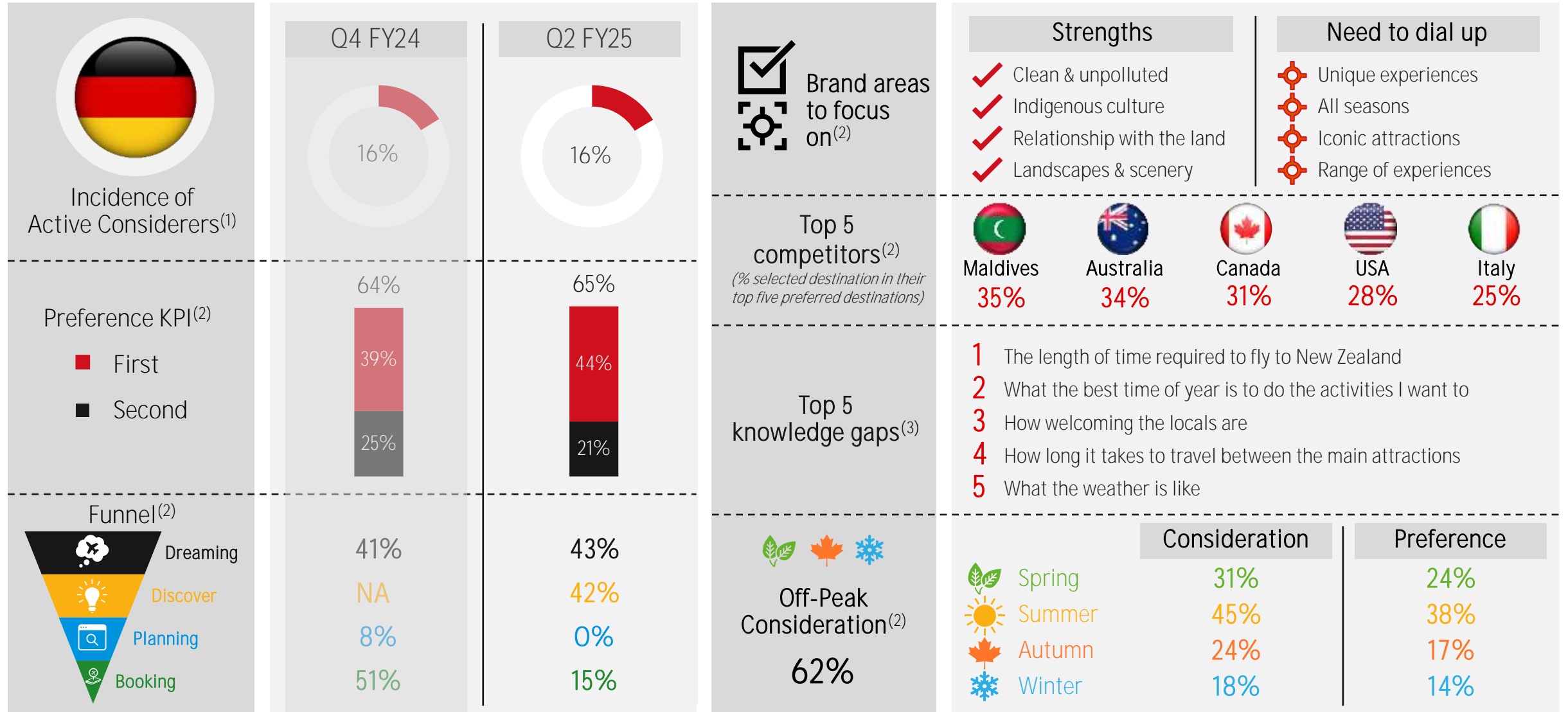
Kantar ensures a representative sample by **weighting** to the age, gender and region distribution of the online population

- Online population estimates come from Kantar's 2024 market sizing exercise

# Performance Dashboard



# Performance Dashboard





UNITED KINGDOM

1

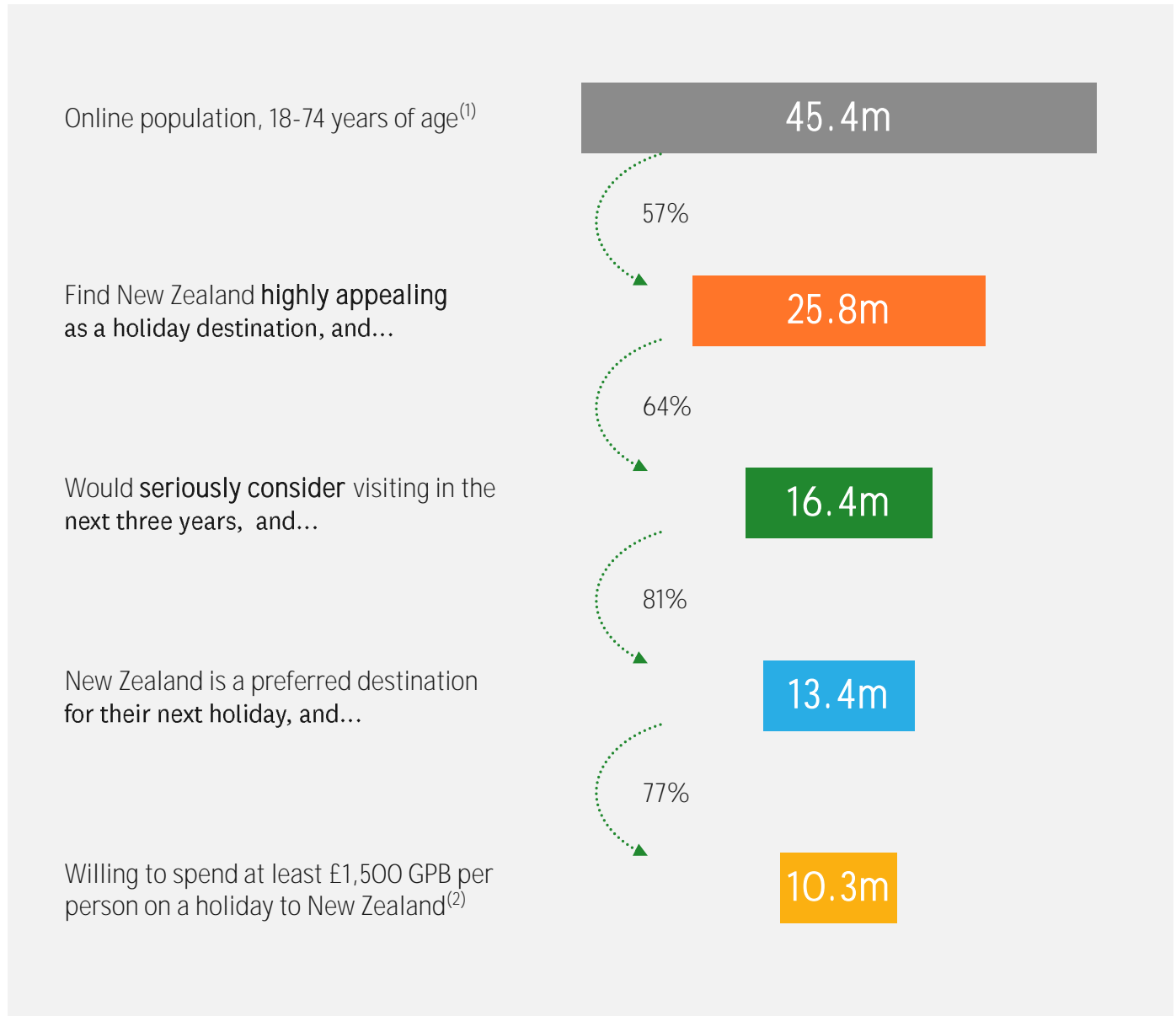
What is the size of  
opportunity in the  
UK?



# Active Considerer Funnel – UK

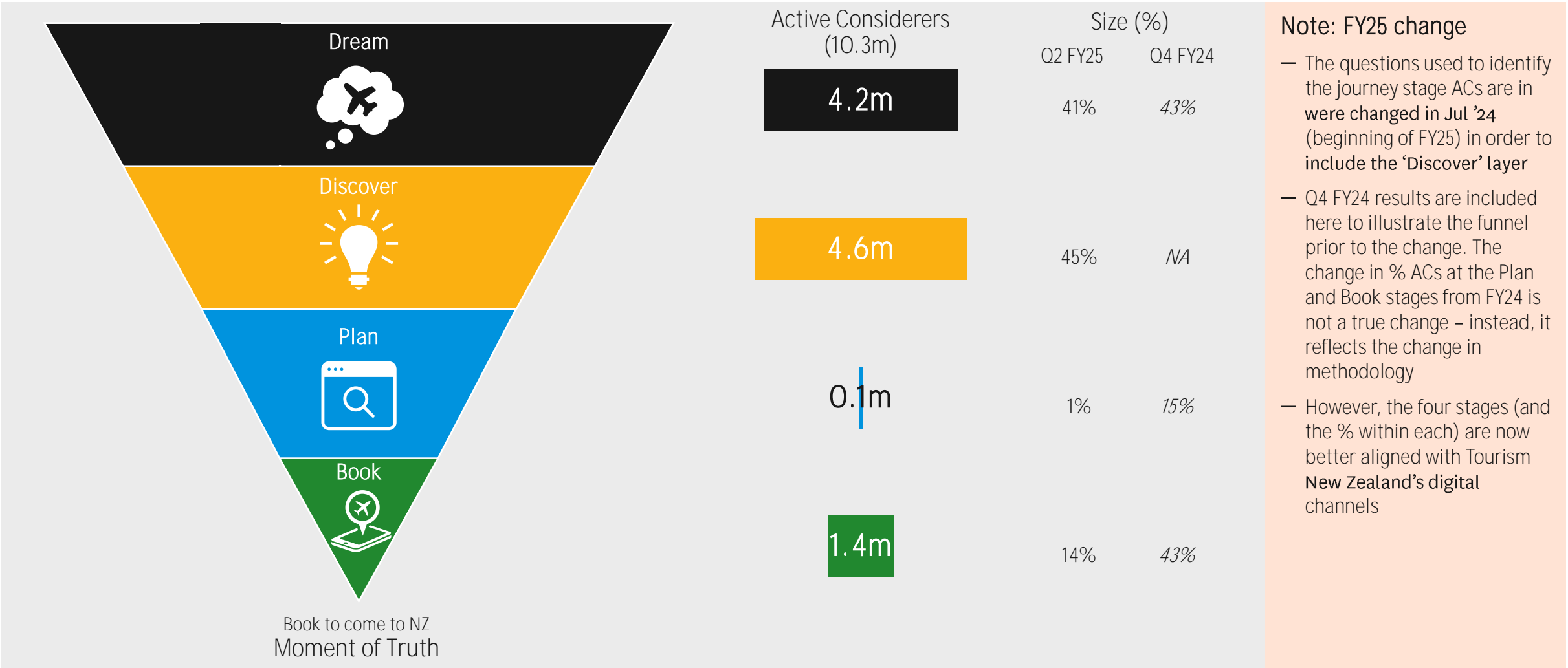
## Active Considerers definition

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 GBP per person) to New Zealand



# Journey funnel to New Zealand – UK

\*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.

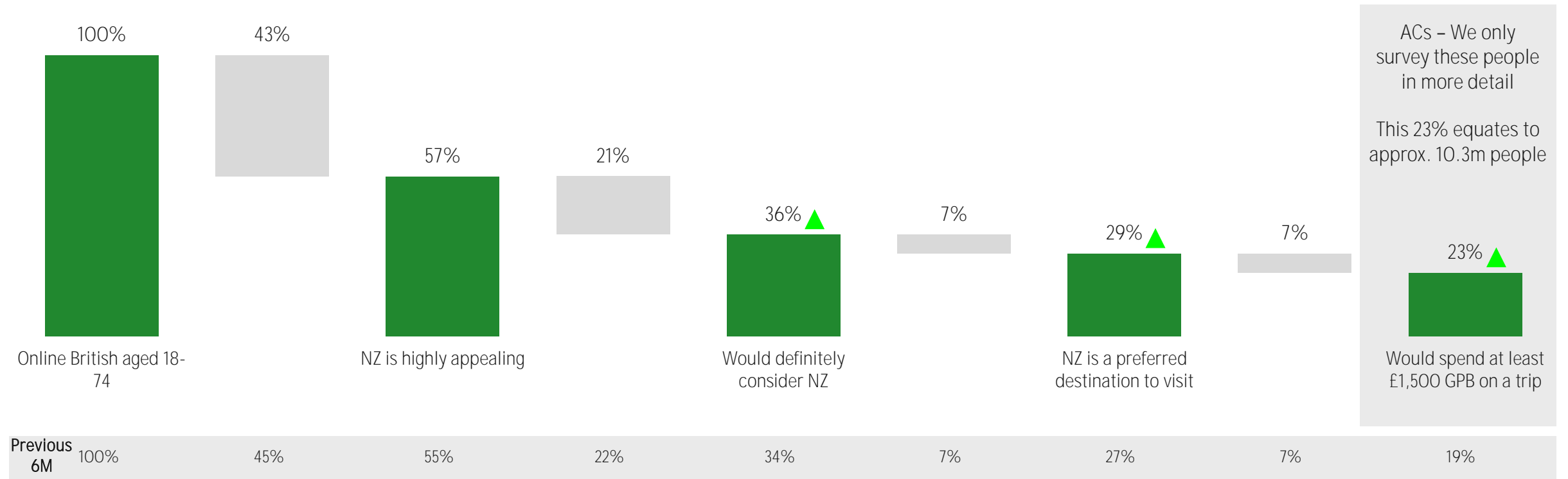




# The AC incidence has grown to 23%, equating to 10.3 million ACs

## Qualifying criteria for defining ACs

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



ACs – We only survey these people in more detail

This 23% equates to approx. 10.3m people

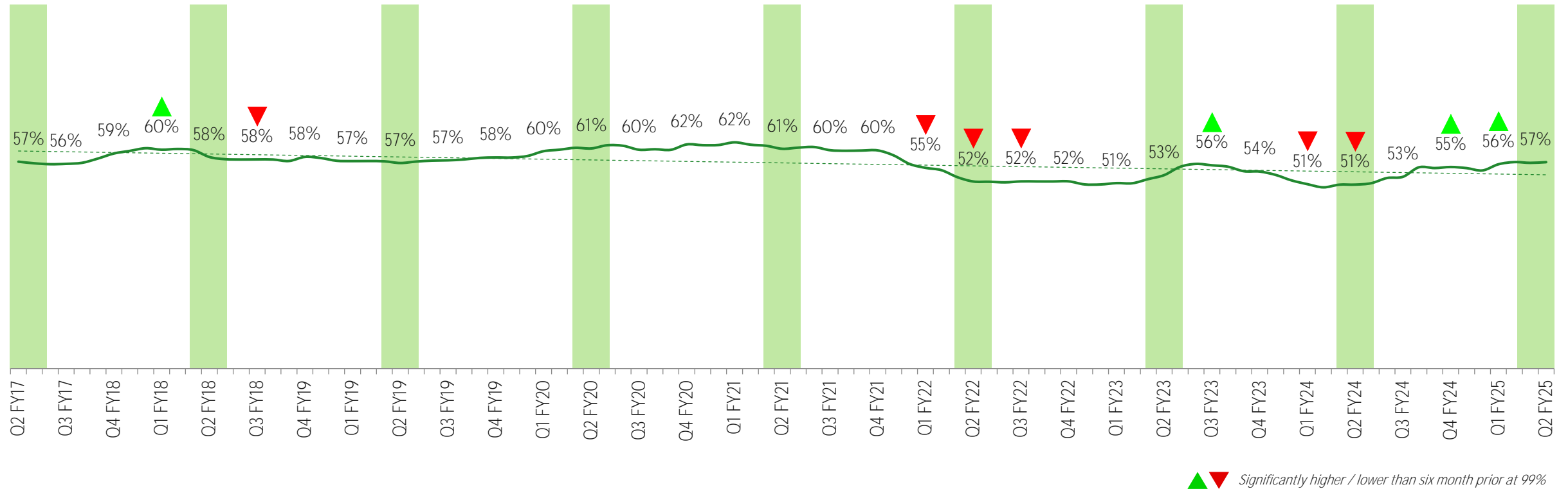
▲ ▼ Significantly higher / lower than six month prior at 99%

# New Zealand appeal has recovered from the decline in FY24, and is back to a high of 57%

## Appeal

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

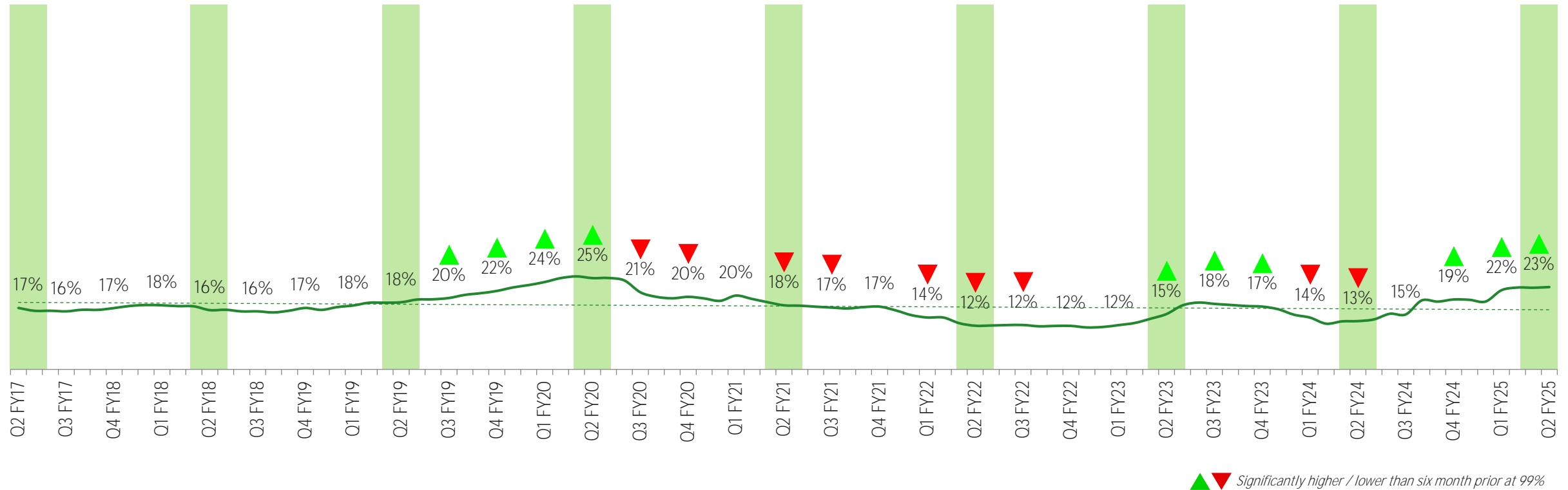
- Appeal is measured among the total online population aged 18 to 74 years old, and is the ‘above the funnel’ measure
- Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals
- Appeal is likely to be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



# The AC incidence has recently reached a post-Covid high of 23%

## Incidence of ACs

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

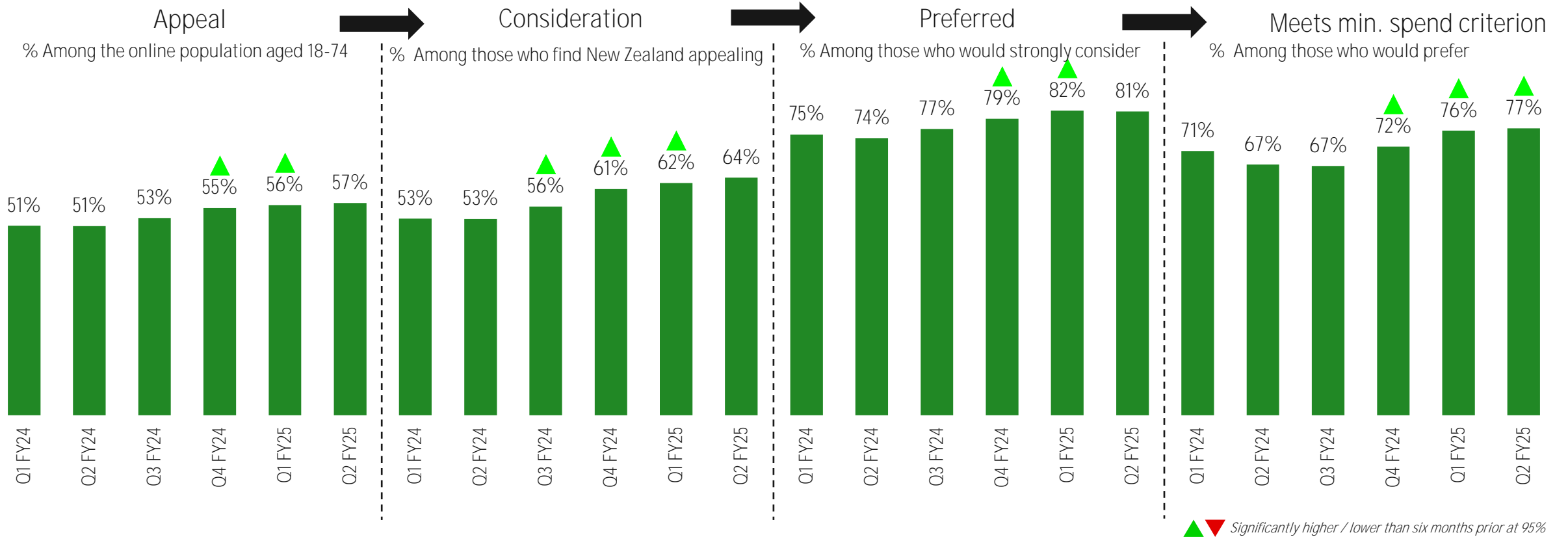


▲ ▼ Significantly higher / lower than six month prior at 99%

# Conversion through the funnel is strong, and has improved in the last year

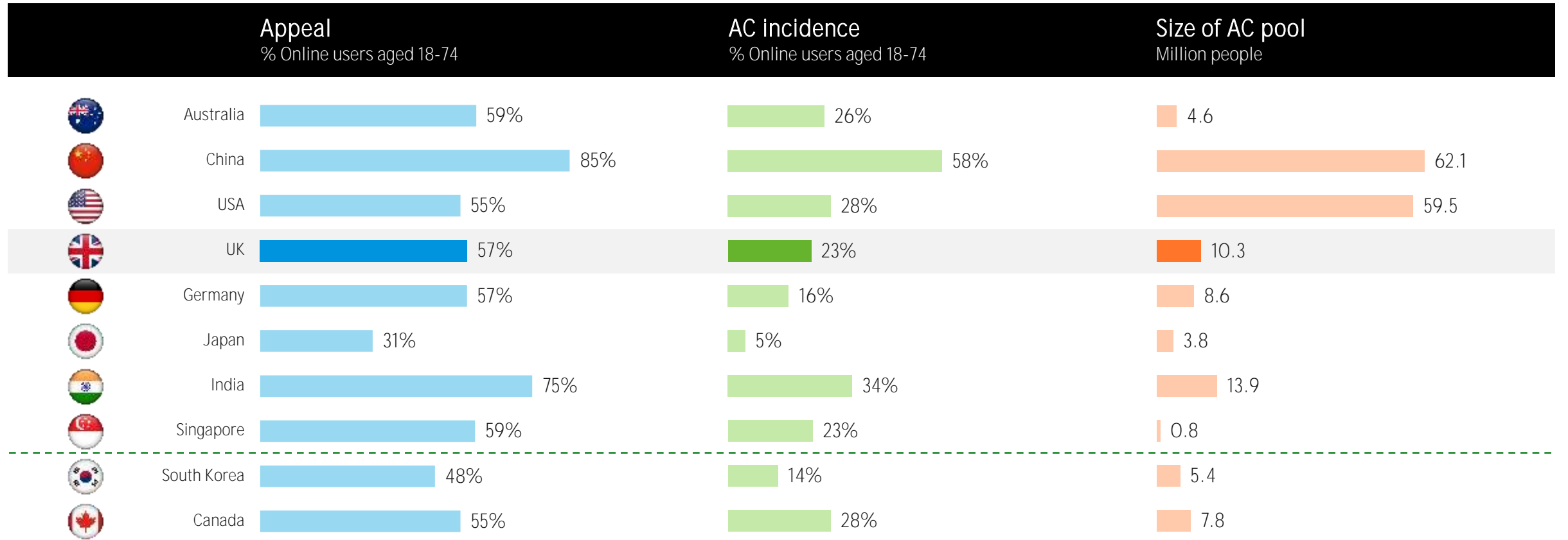
## Conversion of ACs through the Consideration Funnel

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



1. Sample size: Q1 FY24 – Q2 FY25 (6MRA): Appeal n = 8418, 8943, 7374, 5816, 5082, 3940 | Consider n = 4180, 4498, 3842, 3122, 2786, 2185 | Prefer n = 1914, 2083, 1978, 1739, 1558, 1256 | Spend n = 1335, 1443, 1463, 1324, 1219, 993
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?"

# With 10.3 million ACs, the UK presents a healthy opportunity to drive arrivals



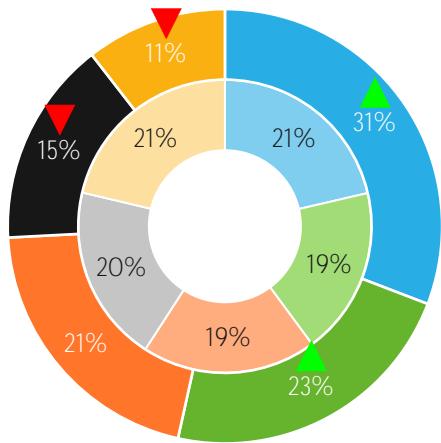
Compared to non-ACs, ACs are more likely to be male, aged 18 - 39 years and based in London; 53% have families with either pre-school or school aged children

### Profile of Active Considerers

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

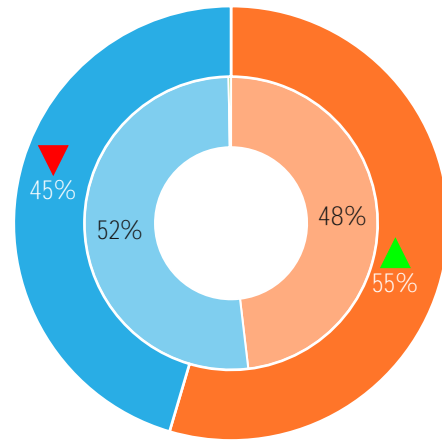
Outer ring: British Active Considerers  
Inner ring: British non-Active Considerers

By age segment



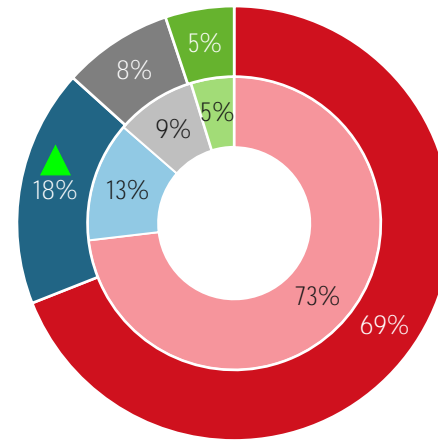
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



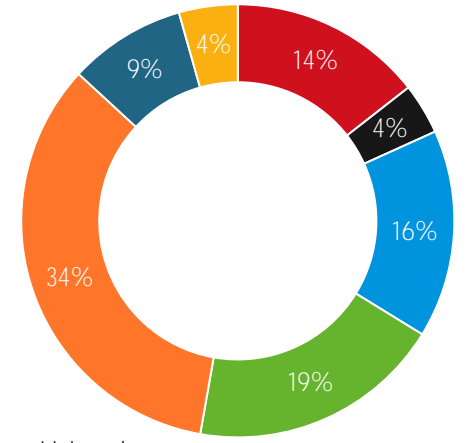
- Male
- Female
- Gender diverse

By region



- Rest of England
- London
- Scotland
- Wales

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

# Total off-peak consideration is stable despite a decline in consideration for spring travel



## Seasons – Consideration & Preference

AC Monitor | Current 5 Months | Total Active Considerers

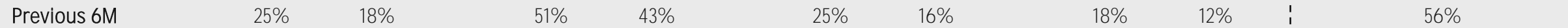
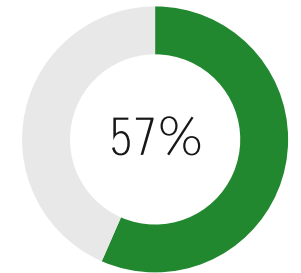
Conversion of consideration to preference



Opportunity



Off-Peak Consideration

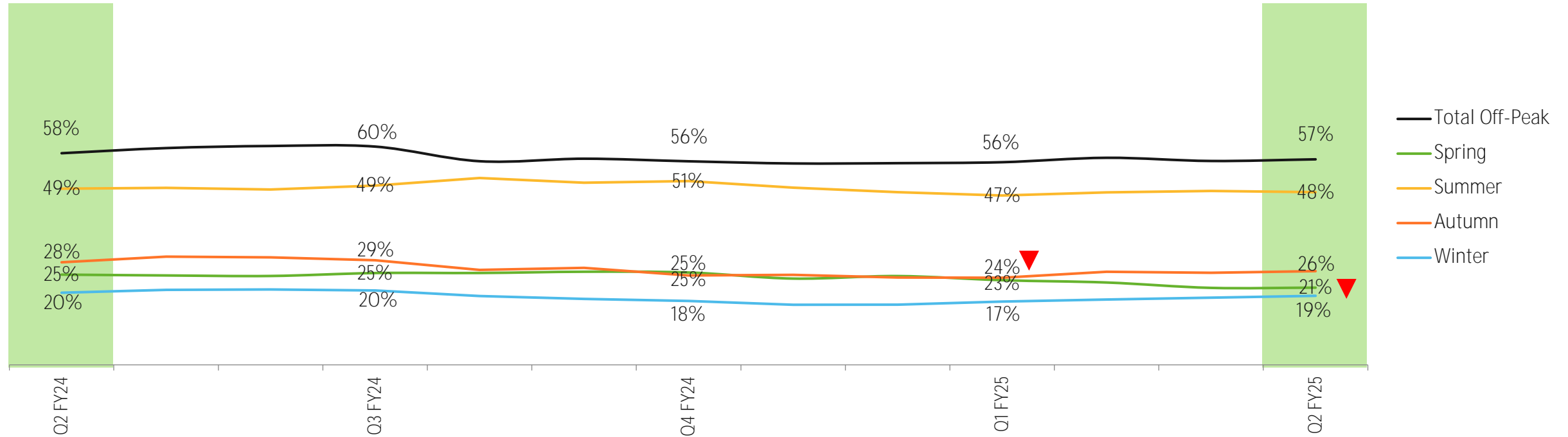


▲ ▼ Significantly higher / lower than six months prior at 95%

# Off-peak consideration has remained stable over the year, despite declining consideration for spring

## Seasonal consideration

AC Monitor | 6MRA | Total Active Considerers



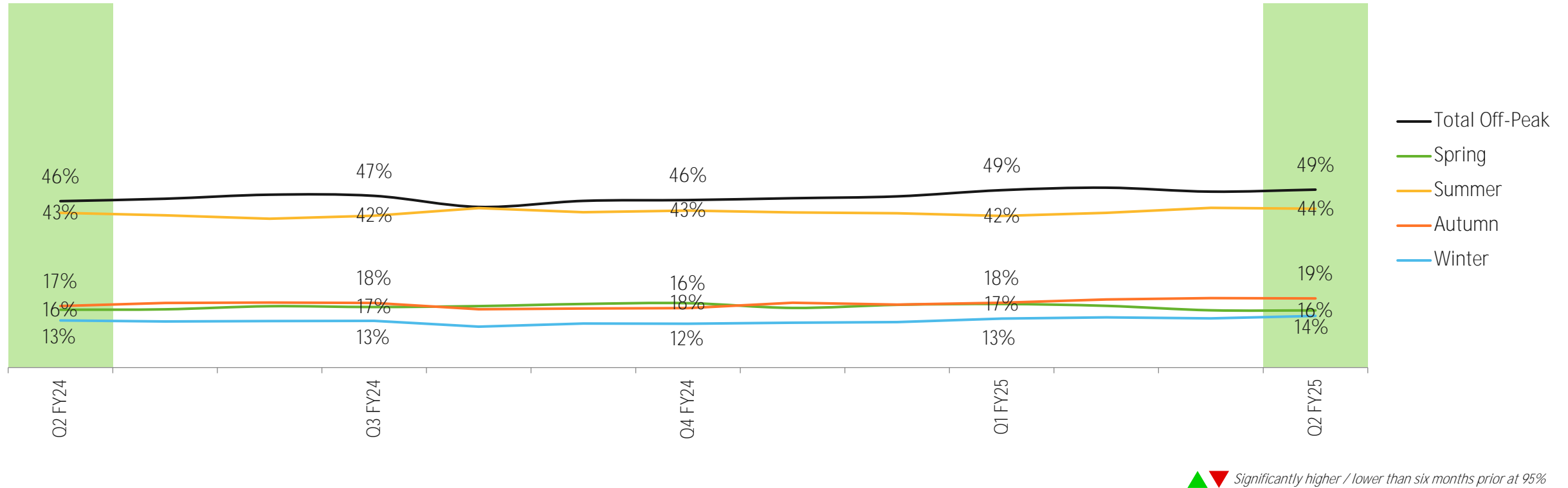
▲ ▼ Significantly higher / lower than six months prior at 95%



Seasonal preference has seen little change over the year, with a sizable 49% ACs preferring to travel to New Zealand during the off-peak season

### Seasonal Preference

AC Monitor | 6MRA | Total Active Considerers



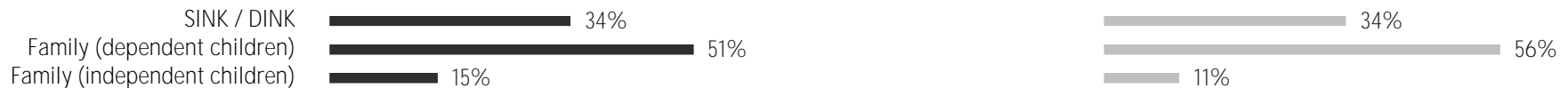
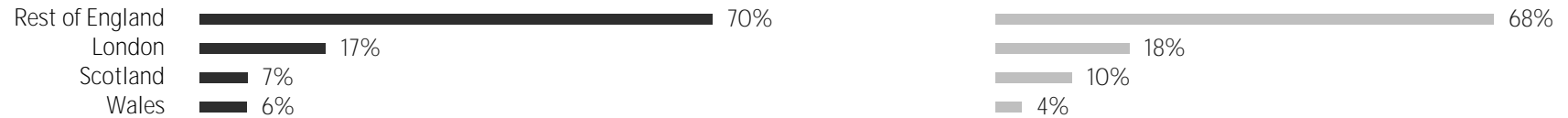
# off-peak considerers have a broadly similar demographic profile to Peak-Only Considerers

## Profile of off-peak considerers

AC Monitor | Current 5 Months | off-peak considerers



## Peak-only considerers



# Demographic profiles vary by season, with spring considerers, for instance, skewing older, towards England (outside London) and away from families with dependent children

## Profile of seasonal considerers

AC Monitor | Current 5 Months |  
Total Active Considerers



Spring  
Off-Peak



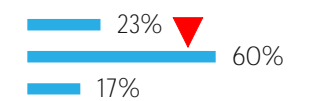
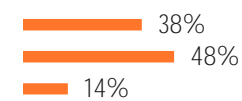
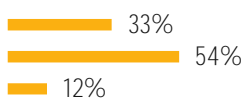
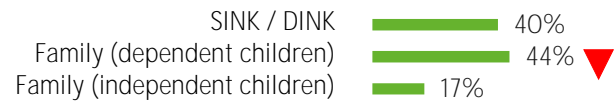
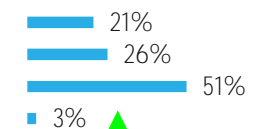
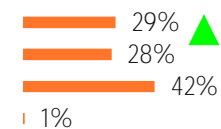
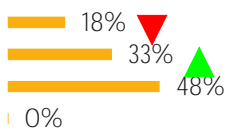
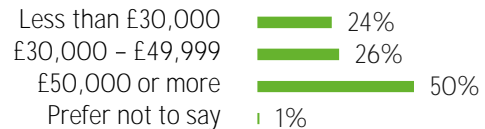
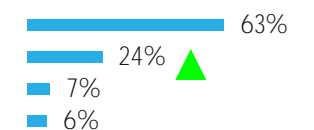
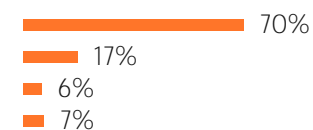
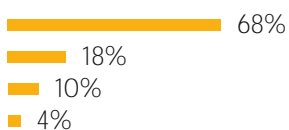
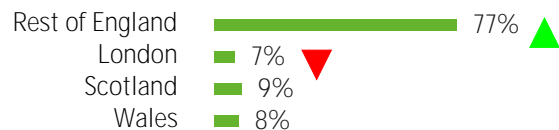
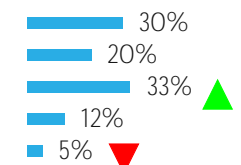
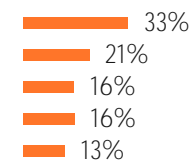
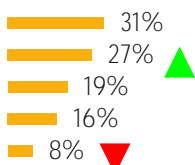
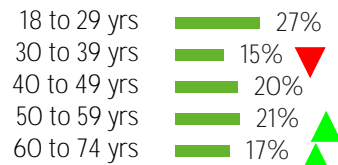
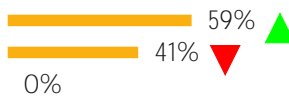
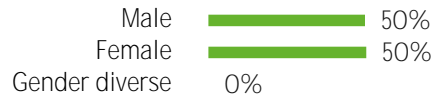
Summer  
Peak



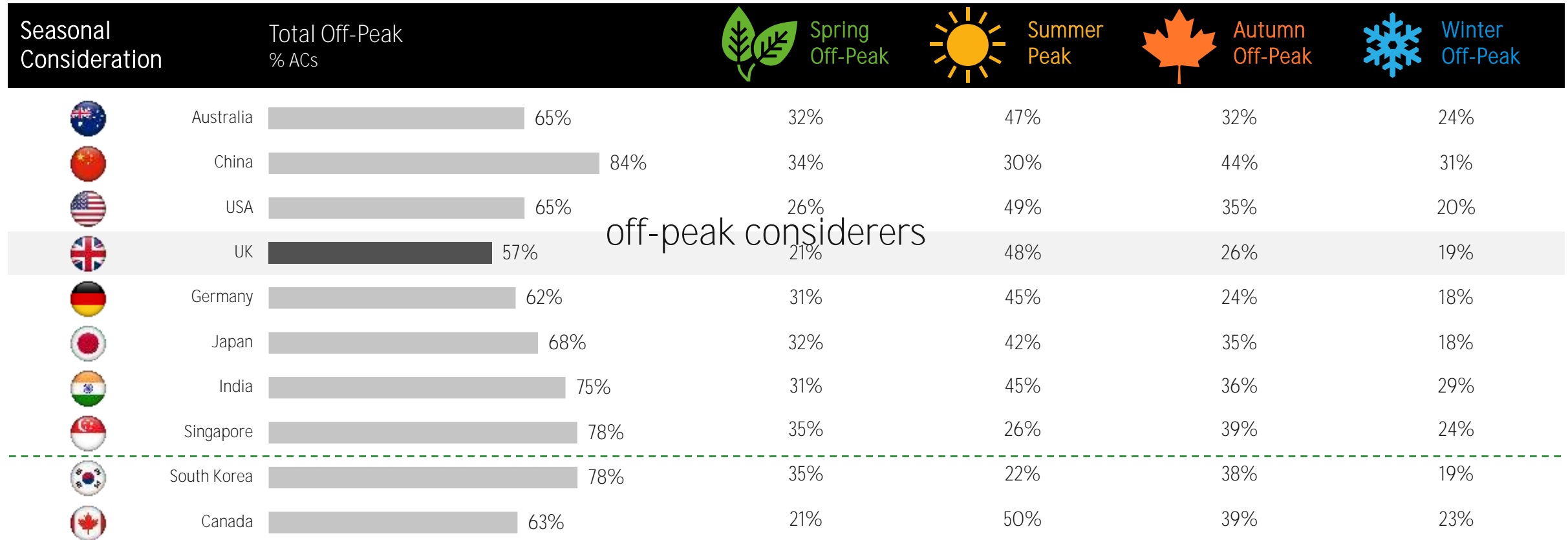
Autumn  
Off-Peak



Winter  
Off-Peak



With 57% UK ACs classified as off-peak considerers, the opportunity to drive off-peak arrivals is sizeable with Autumn representing the primary opportunity



2

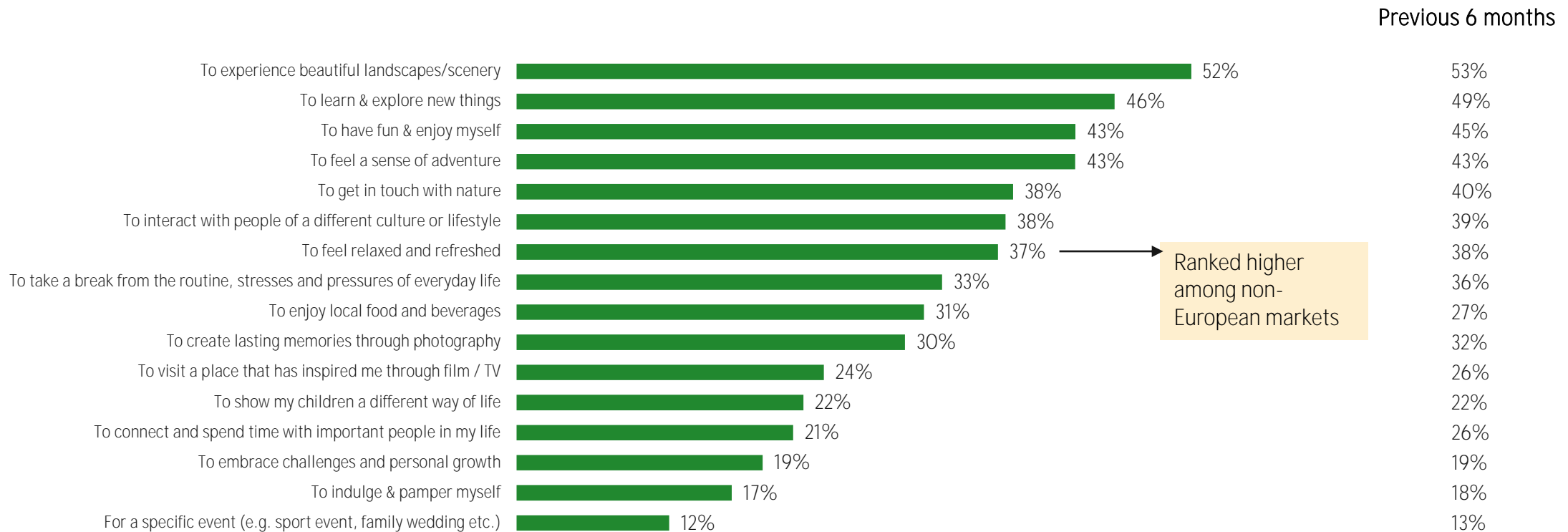
How can TNZ drive desirability of New Zealand as a holiday destination?



# Marketing messages should emphasise the key motivations for visiting New Zealand, namely its beautiful scenery and opportunities to explore, have fun and feel adventurous

## Reasons to visit New Zealand for a holiday

AC Monitor | Current 5 Months | Total Active Considerers



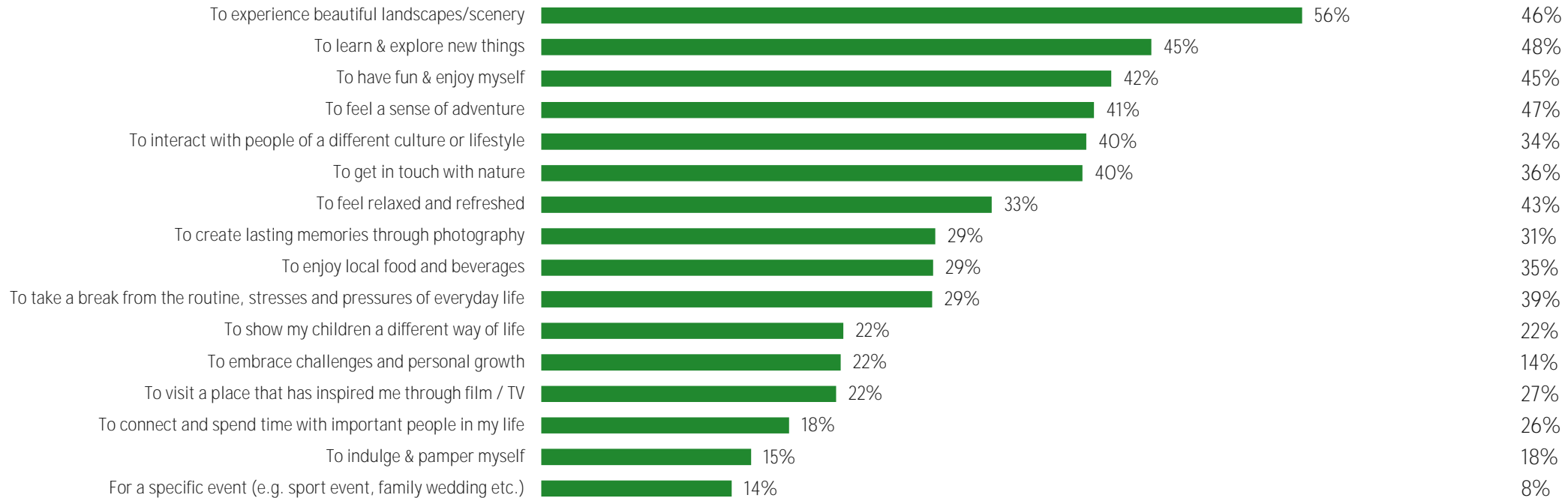
Ranked higher among non-European markets

▲ ▼ Significantly higher / lower than previous period

The top motivations among the off-peak considerer audience are similar to non-considerers, hence marketing messages that reinforce motivations will resonate with both audiences

## Reasons to visit New Zealand for a holiday

AC Monitor | Current 5 Months | off-peak considerers

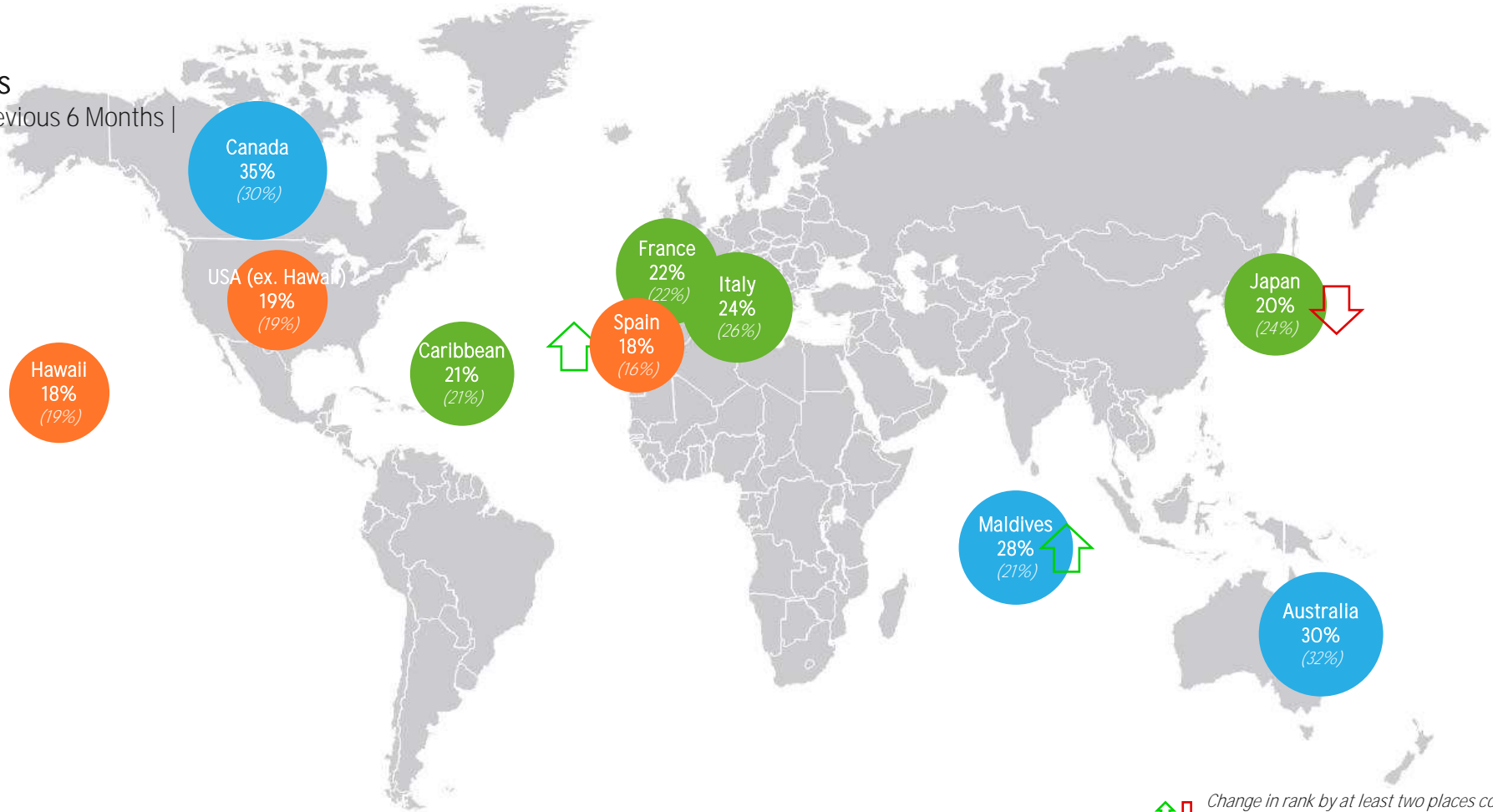


▲ ▼ Significantly higher / lower than Peak-Only Considerers

# Canada and Australia remain New Zealand's top two competitors based on preference, with the Maldives jumping ahead of Italy for rank #3

## Top ten competitor set for ACs

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



United Arab Emirates goes from ranking 9<sup>th</sup> to 12<sup>th</sup> position

### Legend

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

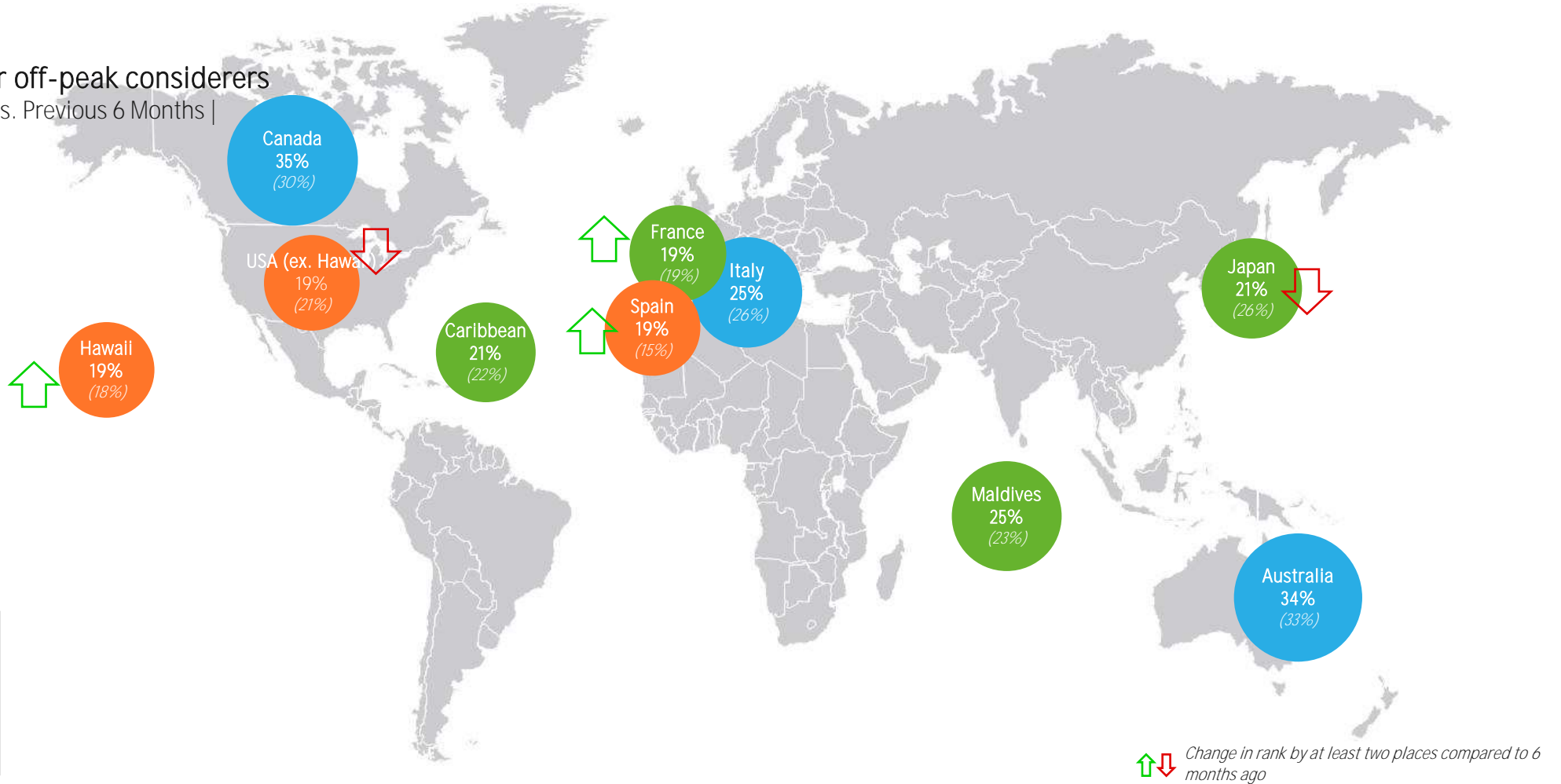
↑ ↓ Change in rank by at least two places compared to 6 months ago



# The top 10 competitor set among off-peak considerers mirrors that of ACs as a whole but Italy clinches #3 spot ahead of the Maldives

## Top ten competitor set for off-peak considerers

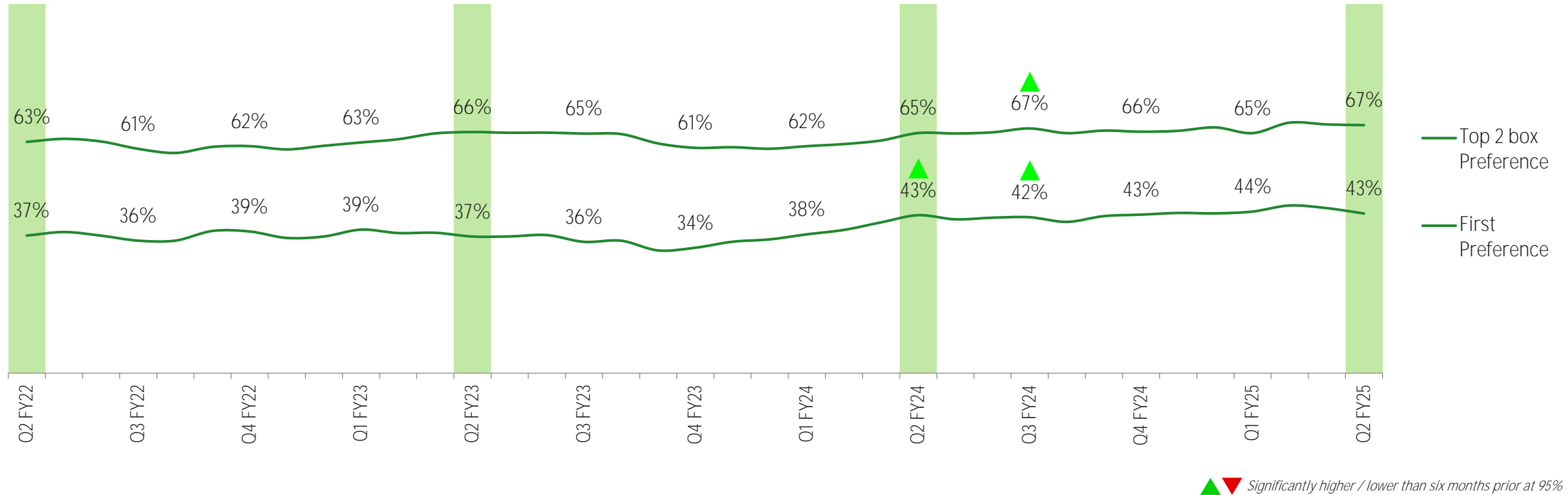
AC Monitor | Current 5 Months vs. Previous 6 Months | off-peak considerers



# Preference for New Zealand has maintained the peak levels seen a year ago

## New Zealand Preference KPI

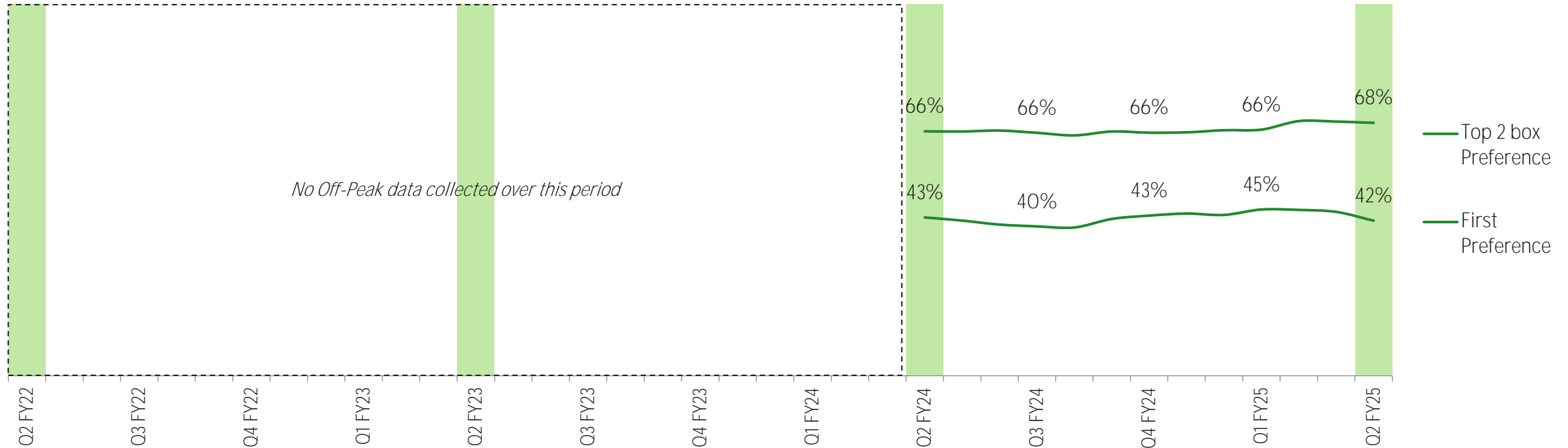
AC Monitor | 6MRA | Total Active Considerers



# Preference among off-peak considerers has remained stable over the last year

## New Zealand Preference KPI for off-peak considerers

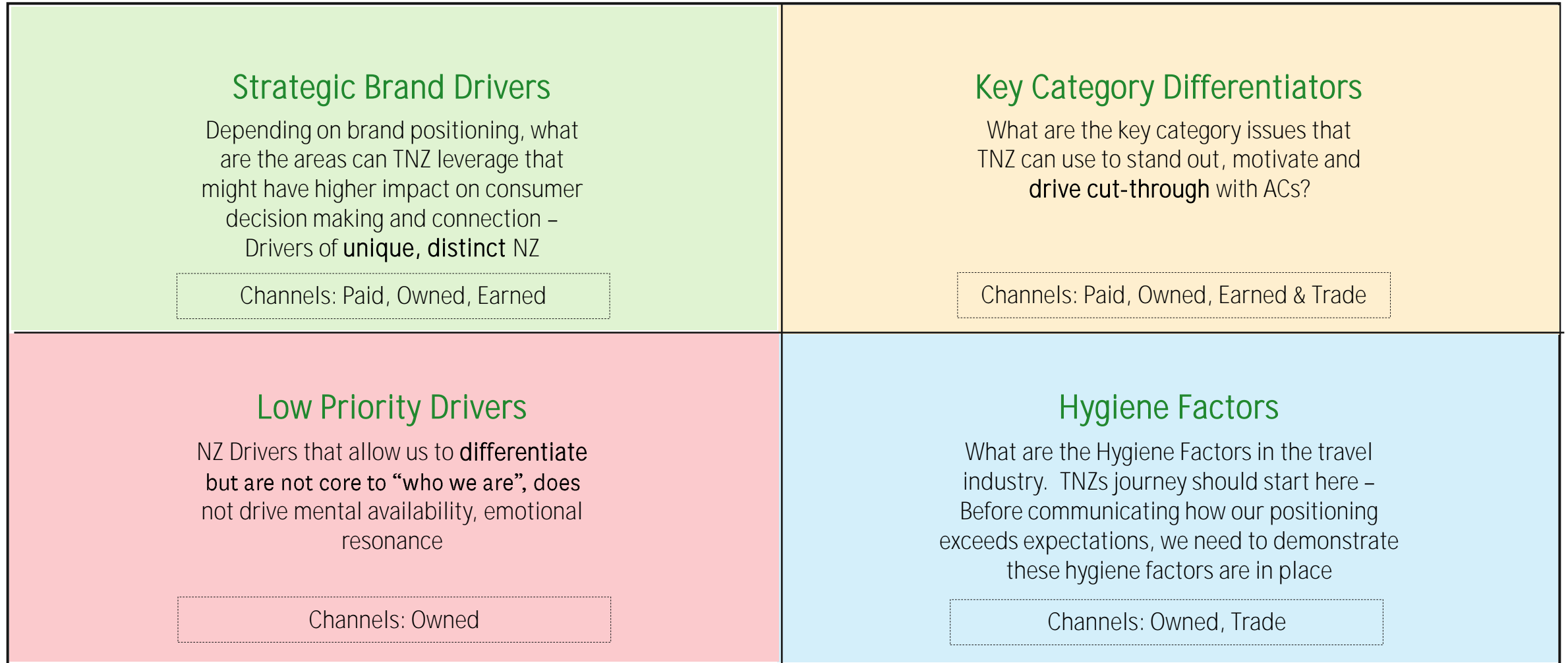
AC Monitor | 6MRA | off-peak considerers



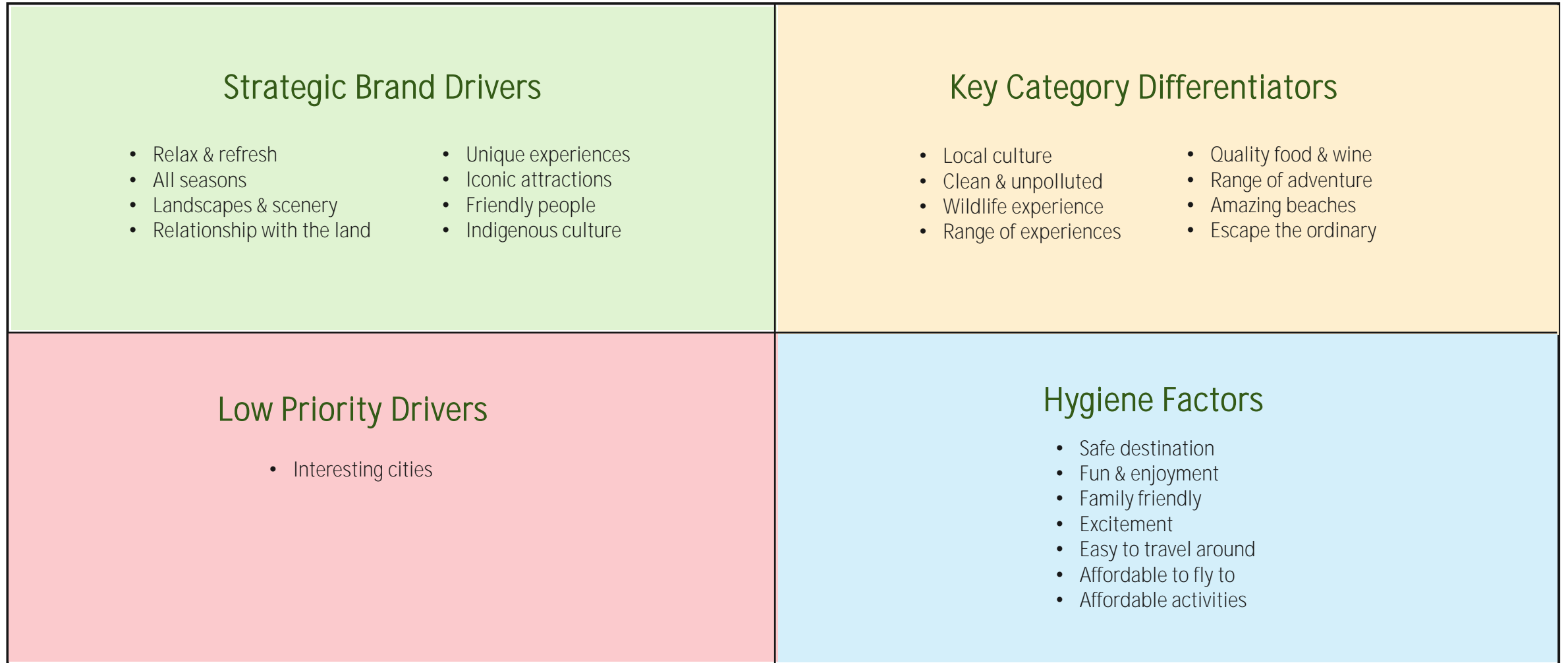
No Off-Peak data collected over this period

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

# A framework to organise and optimise the brand associations that matter



## Categorising brand associations to the framework...



# 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 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

Destination safety, friendliness and land relationship have emerged as the top 3 preference drivers of New Zealand so should be reinforced through brand messaging; additionally, messaging around range of experiences, indigenous culture and escapism should be dialled up

### Drivers of preference for NZ

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

Latest results	2024 rank	2023 rank	2022 rank <sup>(1)</sup>
Safe destination	1	11	1
Friendly people	2	17	10
Relationship with the land	3	24	18
Excitement	4	1	*
Range of experiences	5	12	8
Range of adventure	6	7	5
Landscapes & scenery	7	2	2
Indigenous culture	8	16	12
Escape the ordinary	9	18	15
Local culture	10	10	14
Clean & unpolluted	11	5	13
Amazing beaches	12	21	*
Unique experiences	13	9	11
Wildlife	14	3	24
Relax & refresh	15	8	22

Latest results	2024 rank	2023 rank	2022 rank <sup>(1)</sup>
Easy to travel around	16	23	27
Quality food & wine	17	20	17
Fun & enjoyment	18	4	9
All seasons	19	22	26
Iconic attractions	20	13	23
Interesting cities	21	19	25
Family friendly	22	14	28
Affordable activities	23	25	29
Affordable to fly to	24	26	31

Changes in brand attribution list affect comparability in ranking over time

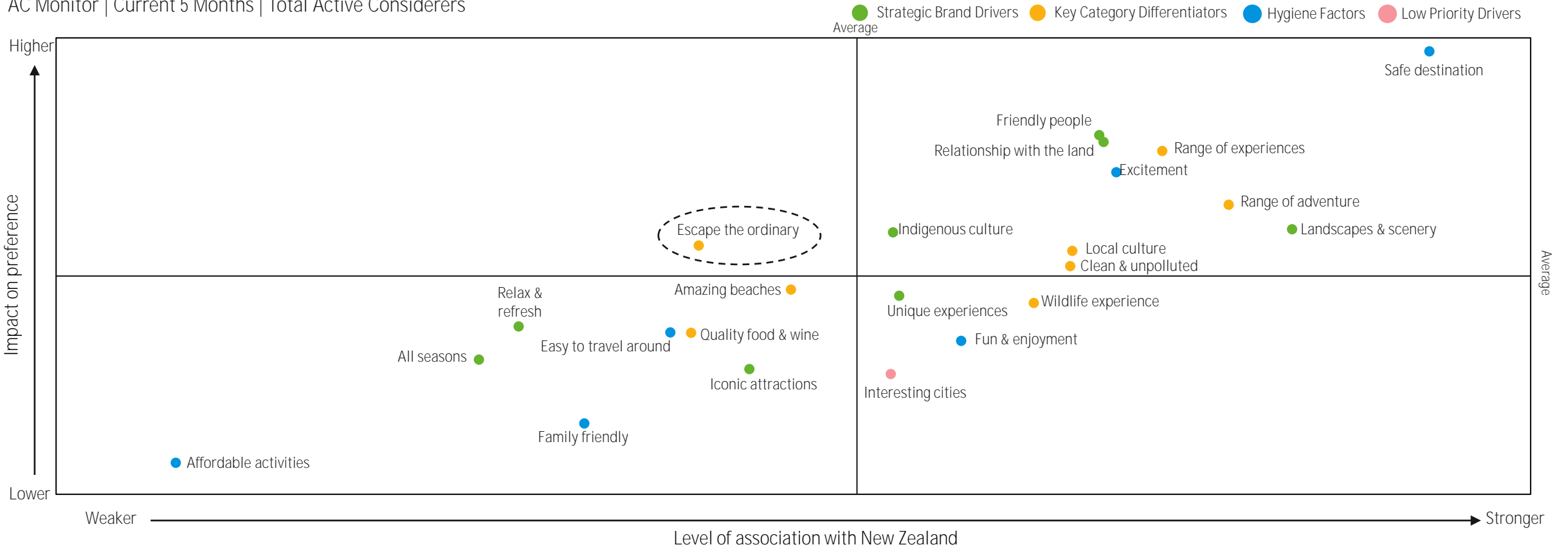
Strategic Brand Drivers	Key Category Differentiators
Low Priority Drivers	Hygiene Factors



New Zealand as a destination performs stronger on higher impact drivers, particularly destination safety, but boosting perceptions of escapism is worth attention given its higher than average impact and lower than average performance

### Brand Associations of New Zealand x Impact on preference

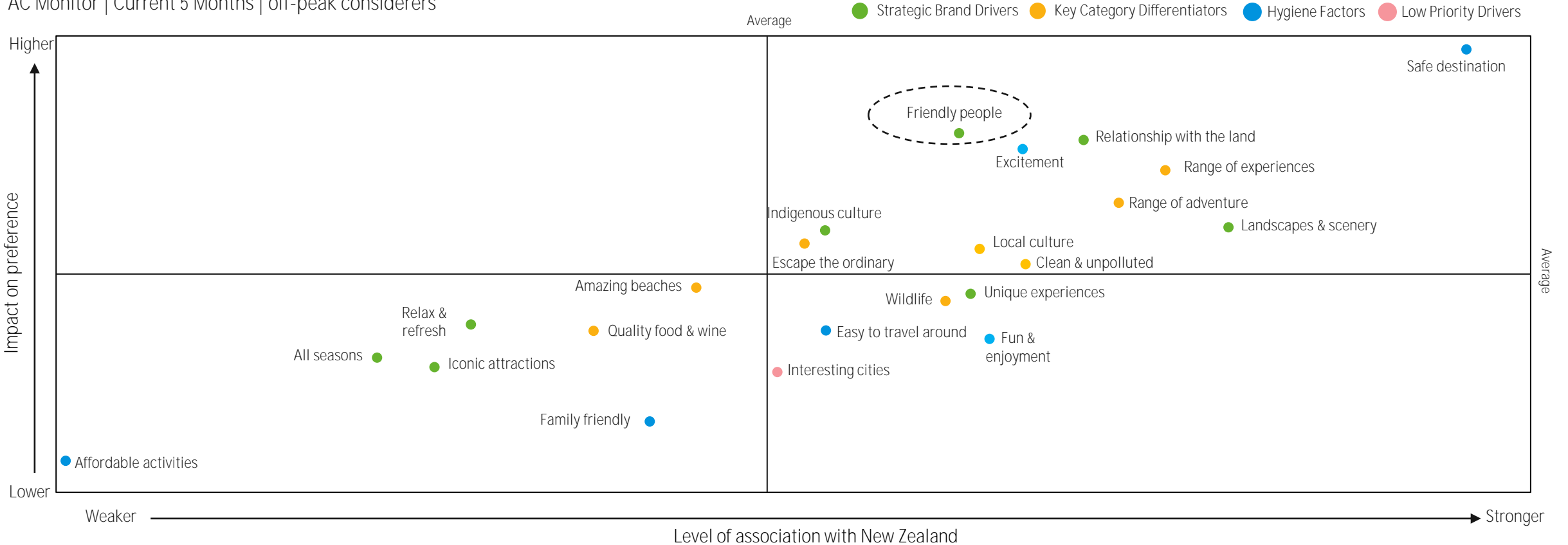
AC Monitor | Current 5 Months | Total Active Considerers



Among off-peak considerers, there may be scope to enhance perceptions of friendly people given its high impact but more moderate performance

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

AC Monitor | Current 5 Months | off-peak considerers



**Relative to competitors, New Zealand’s strategic strengths are its relationship to the land and indigenous culture but more could be done to enhance its competitive edge on friendly people, landscapes and scenery and unique experiences, as well as a range of experiences**

**Relative brand positioning for Strategic Brand Drivers and Key Category Differentiators**

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

		New Zealand	Canada	Australia	Maldives	Italy	France	
Strategic Brand Drivers	Friendly people	101	103	90	100	103	104	<b>Actions for TNZ:</b>  <b>Strengths:</b> <ul style="list-style-type: none"> <li>Relationship with the land</li> <li>Indigenous culture</li> <li>Range of adventure</li> <li>Clean &amp; unpolluted</li> </ul> <b>Drivers to dial up:</b> <ul style="list-style-type: none"> <li>Friendly people</li> <li>Landscapes &amp; scenery</li> <li>Unique experiences</li> <li>Relax &amp; refresh</li> <li>Iconic attractions</li> <li>Range of experiences</li> <li>Escapism</li> </ul>
	Relationship with the land	121	106	112	94	63	87	
	Landscapes & scenery	101	111	103	105	96	79	
	Indigenous culture	117	86	117	91	85	90	
	Unique experiences	102	108	95	119	79	94	
	Relax & refresh	93	92	82	146	98	93	
	All seasons	98	85	108	107	102	101	
	Iconic attractions	91	103	112	68	123	111	
Key Category Differentiators	Range of experiences	93	112	101	95	112	90	
	Range of adventure	105	119	106	98	72	93	
	Escape the ordinary	100	91	102	115	92	97	
	Local culture	102	89	102	85	119	105	
	Clean & unpolluted	116	107	94	107	64	102	
	Amazing beaches	98	65	118	139	87	89	
	Wildlife experience	116	116	132	75	70	73	
	Quality food & wine	92	88	96	93	127	115	

# New Zealand performs less competitively on hygiene factors, most notably fun & enjoyment, family friendly and flight affordability

## Relative brand positioning for Hygiene Factors and Low Priority

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

		New Zealand	Canada	Australia	Maldives	Italy	France
Hygiene Factors	Safe destination	102	110	97	91	97	101
	Excitement	98	108	99	112	96	86
	Easy to travel around	99	103	88	90	112	112
	Fun & enjoyment	93	107	99	108	100	96
	Family friendly	94	100	101	98	113	97
	Affordable activities	101	92	87	100	102	122
	Affordable to fly to	82	85	66	85	157	149
Low Priority	Interesting cities	93	104	91	76	125	122

### Actions for TNZ:

#### Drivers to dial up:

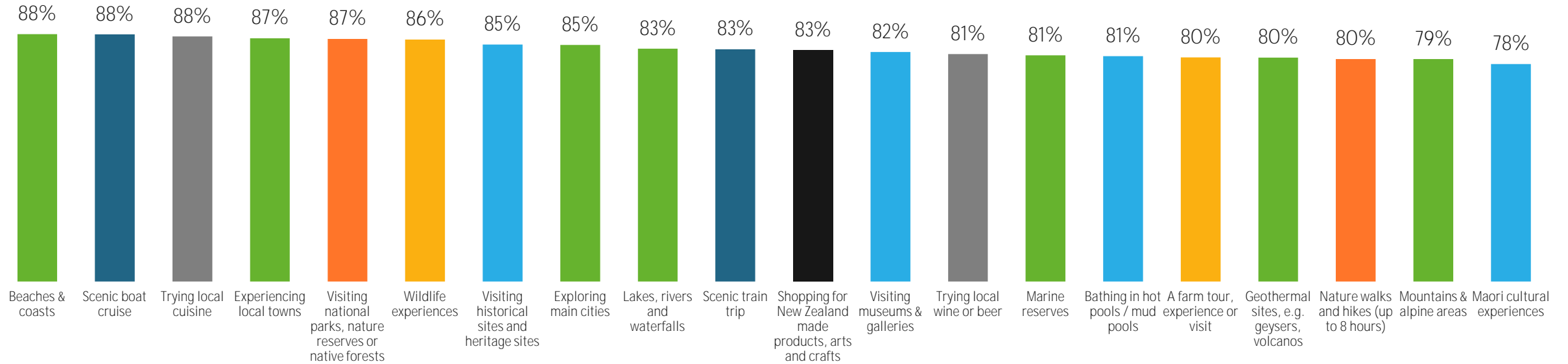
- Excitement
- Fun & Enjoyment
- Family friendly
- Affordable to fly to

ACs have high levels of interest across a range of activities presenting an opportunity to showcase New Zealand's range of experiences; off-peak considerers show higher interest in scenic boat and train trips, marine reserves and mountains & alpine areas – consider this when targeting

### Activities interested in doing in New Zealand (Top 20)

AC Monitor | Current 5 Months | Total Active Considerers

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



#### off-peak considerers



3

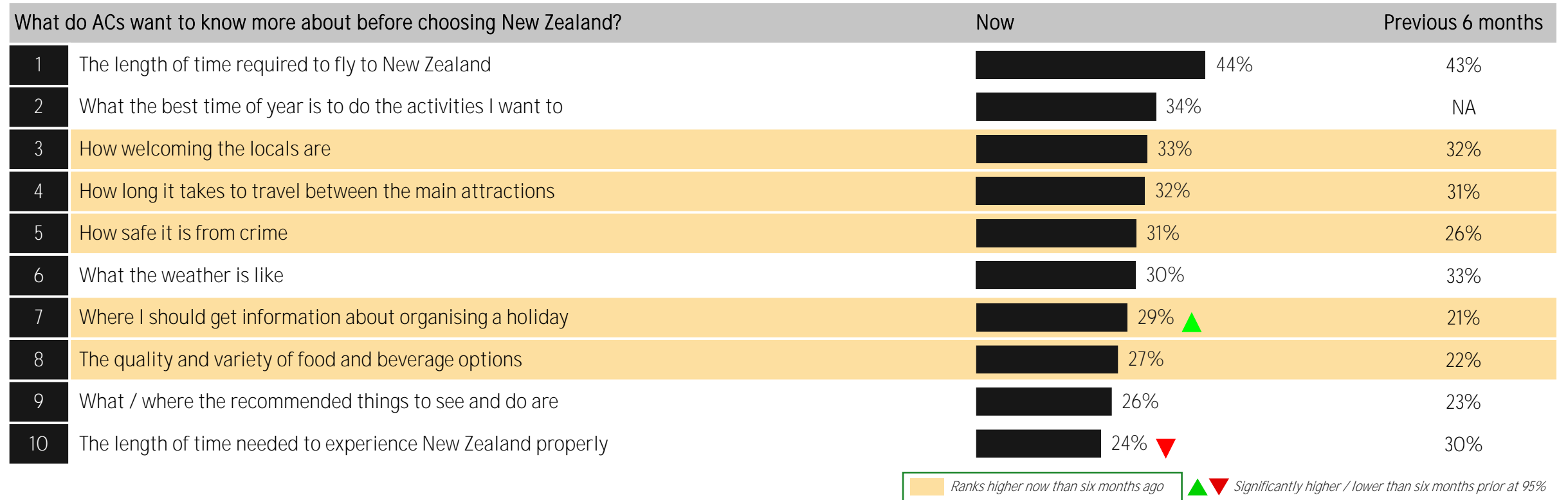
How can TNZ maximise impact along consumer path to purchase?



Flight duration remains the largest knowledge gap but understanding the ideal time of year to do various activities has emerged as a new knowledge gap – this presents an opportunity to convert ACs by showcasing what is available during off-peak seasons in New Zealand

### Top ten knowledge gaps

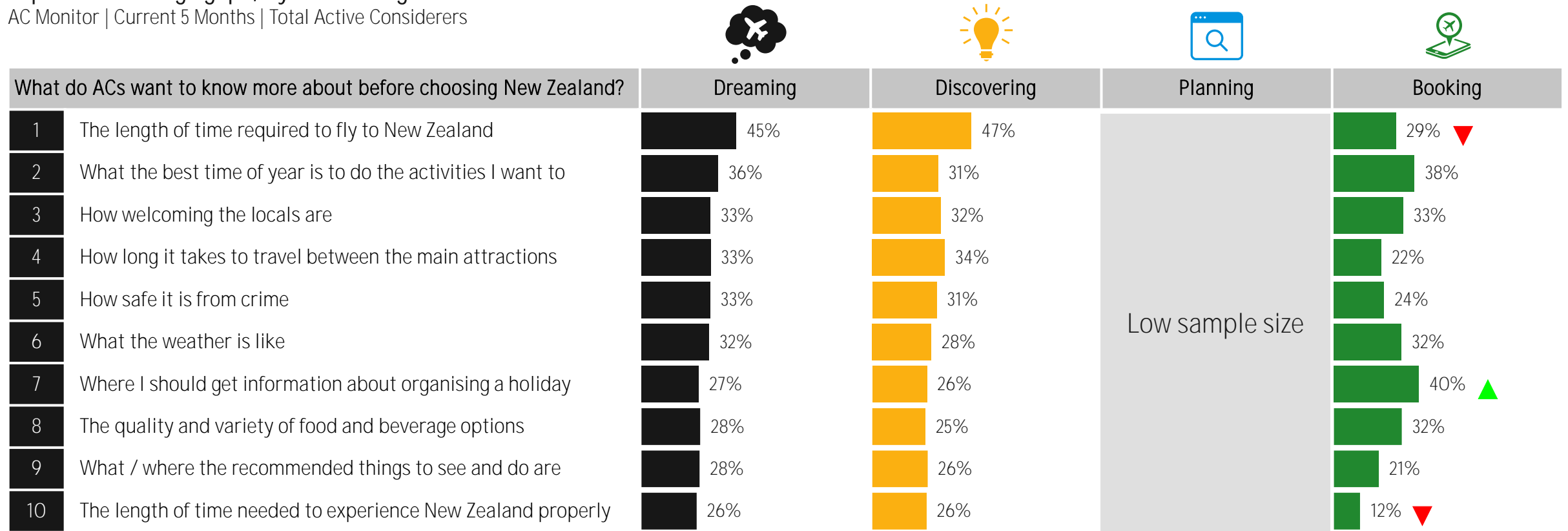
AC Monitor | Current 5 Months vs. Previous 6 Months | Total Active Considerers



Knowledge gaps are similar across Dreamers and Discoverers indicating that similar messaging will resonate with each audience; however, to convert Bookers, messages around where to get information about organising a holiday should be dialled up

### Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5 Months | Total Active Considerers



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



Off-peak considerers have smaller knowledge gaps than non-considerers but the ranked order of knowledge gaps is similar – hence, the priorities for addressing knowledge gaps can remain consistent

### Top ten knowledge gaps for off-peak considerers

AC Monitor | Current 5 Months | off-peak considerers

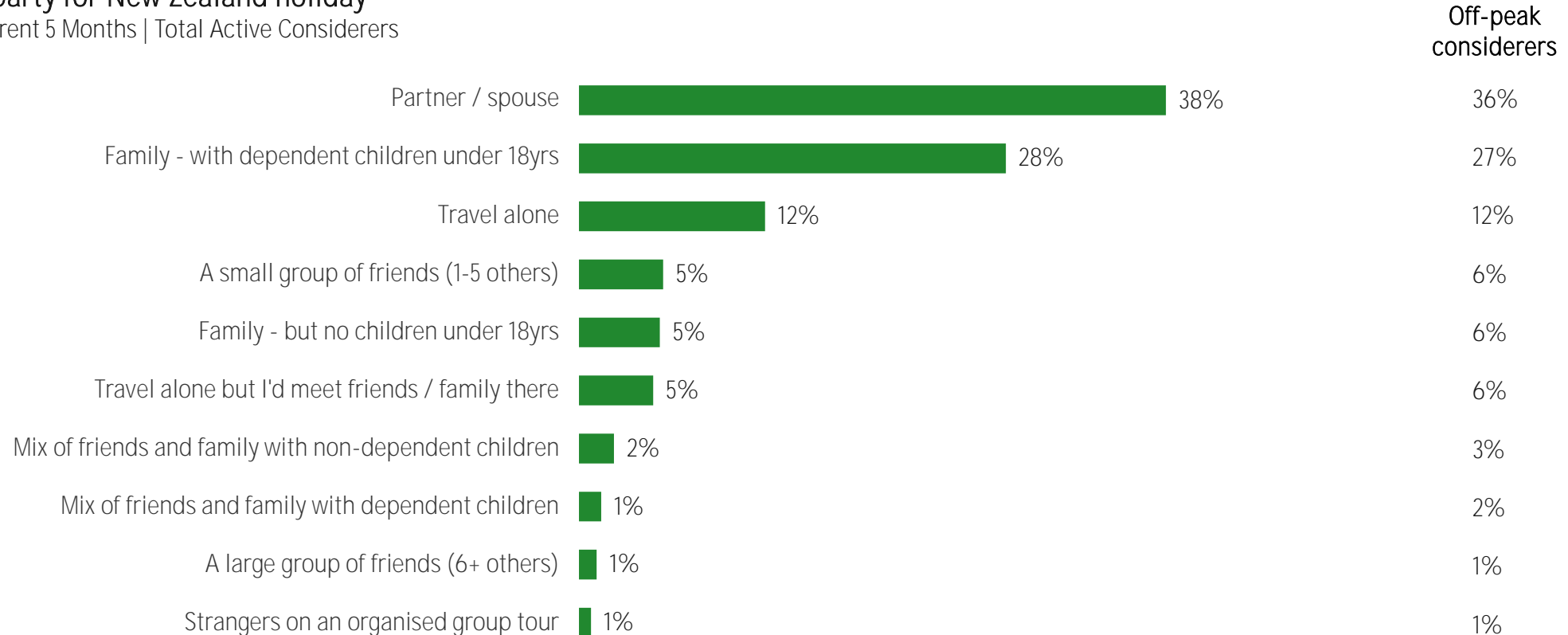
What do ACs want to know more about before choosing New Zealand?		off-peak considerers	Peak-Only Considerers
1	The length of time required to fly to New Zealand	43%	45%
2	What the best time of year is to do the activities I want to	30% ▼	40%
3	How welcoming the locals are	29%	37%
4	How long it takes to travel between the main attractions	29%	36%
5	How safe it is from crime	29%	32%
6	What the weather is like	28%	33%
7	Where I should get information about organising a holiday	20% ▼	39%
8	The quality and variety of food and beverage options	22% ▼	33%
9	What / where the recommended things to see and do are	21% ▼	32%
10	The length of time needed to experience New Zealand properly	21%	28%

▲ ▼ Significantly higher / lower than Peak-Only Considerers

ACs are most likely to travel to New Zealand with their spouse/partner or family - this is also the case among off-peak considerers

### Likely travel party for New Zealand holiday

AC Monitor | Current 5 Months | Total Active Considerers



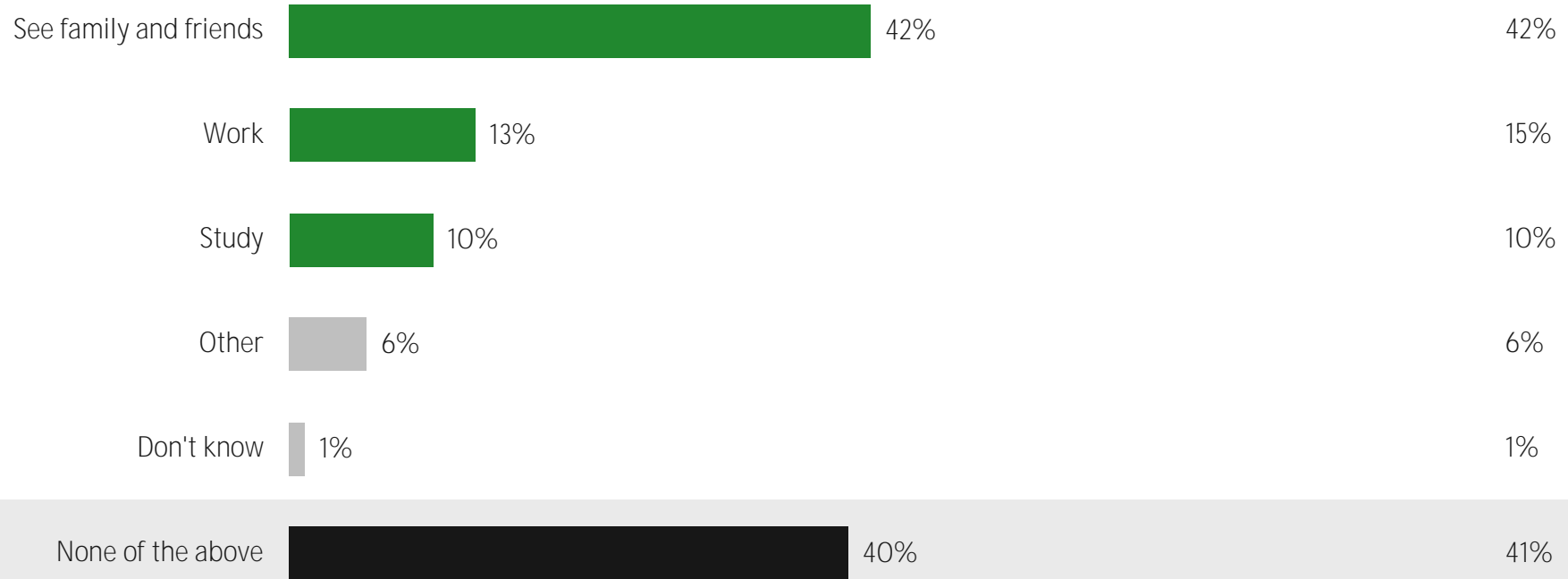
▲ ▼ Significantly higher / lower than Peak-Only Considerers

The AC pool is largely split between those who intend to visit New Zealand for a holiday only, and those who intend to visit family or friends – this is also the case among off-peak considerers

### Additional intentions when on holiday in New Zealand

AC Monitor | Current 5 Months | 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



GERMANY

5

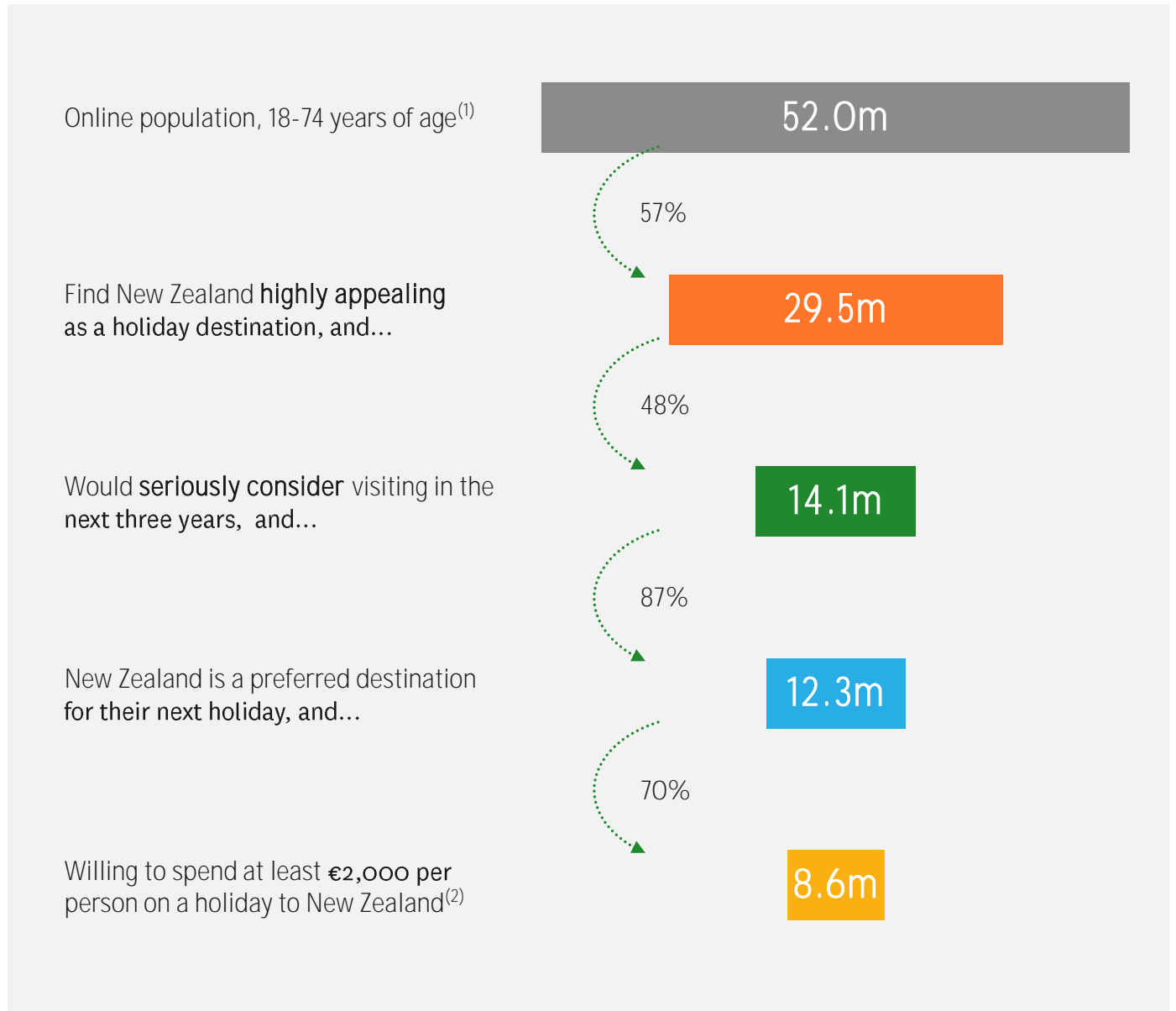
What is the size of  
opportunity in  
Germany?



# Active Considerer Funnel – Germany

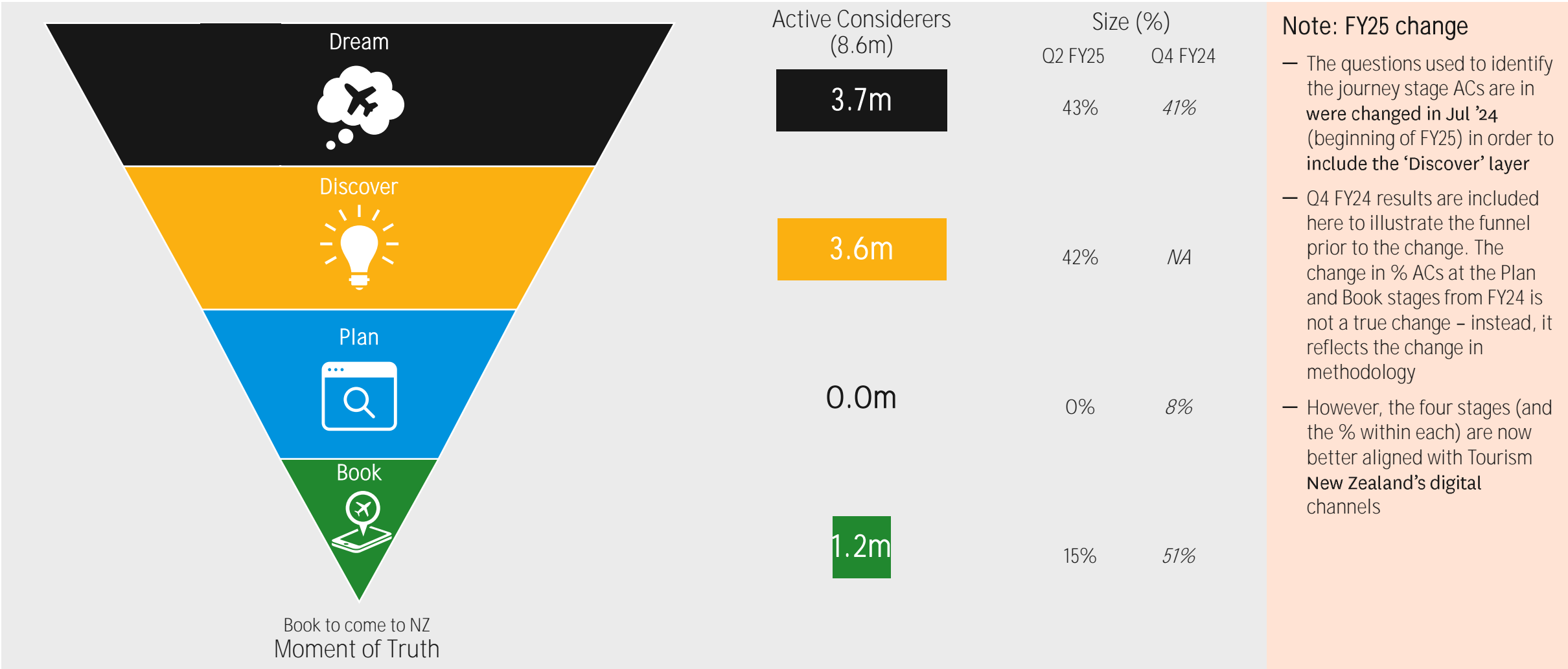
## Active Considerers definition

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 €2,000 per person) to New Zealand.



# Journey funnel to New Zealand – Germany

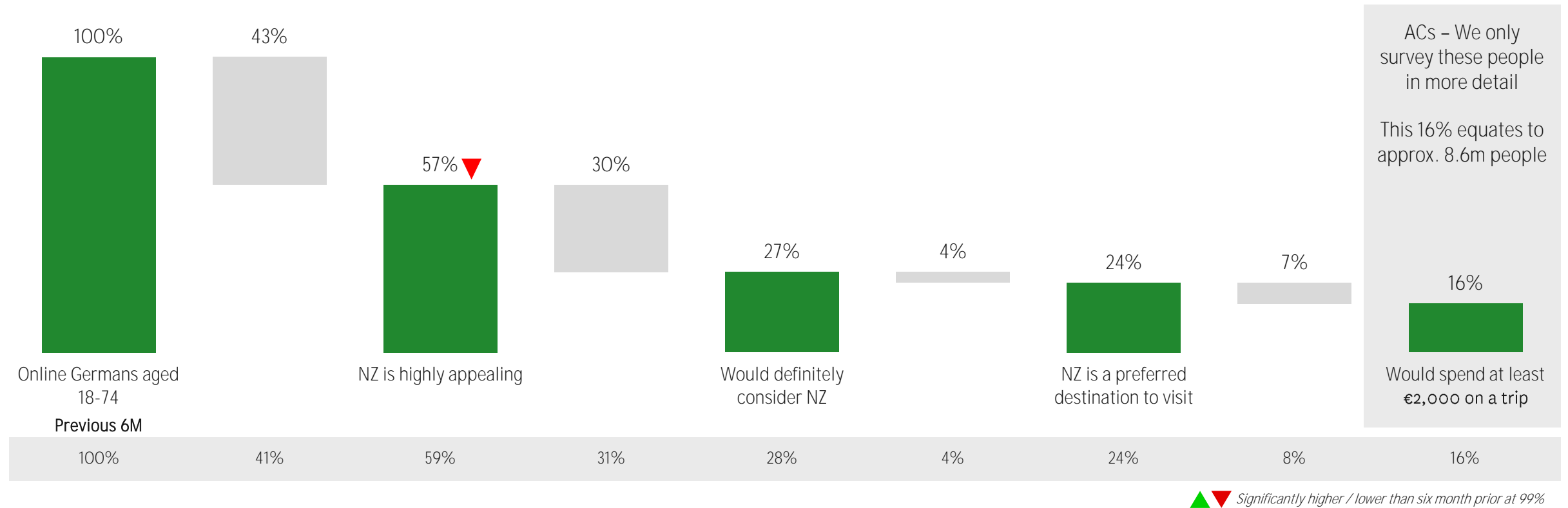
**\*The addition of 'Discover' into our Brand Tracking commenced in July 2024 (at the start of FY25). We are still calibrating and reviewing this question.**



With a stable AC incidence of 16%, equating to approximately 8.6 million potential ACs, Germany continues to present an attractive opportunity for TNZ

### Qualifying criteria for defining ACs

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



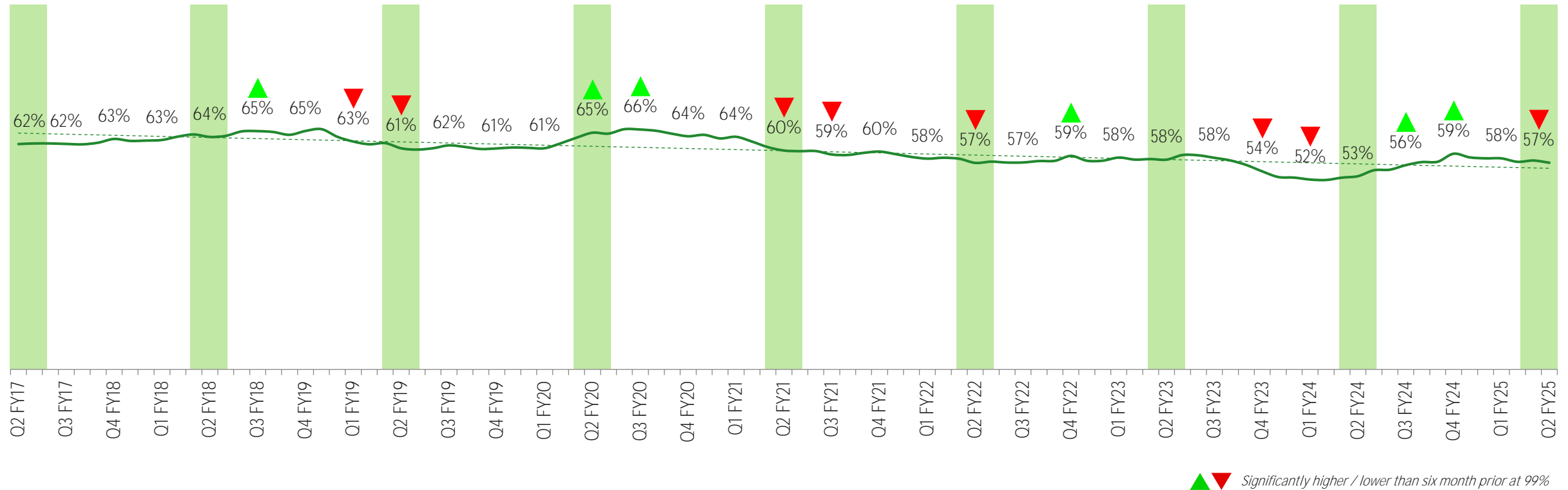


# New Zealand's appeal has declined in Q2 FY25 to 57% , but is above a year ago level

## Appeal

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

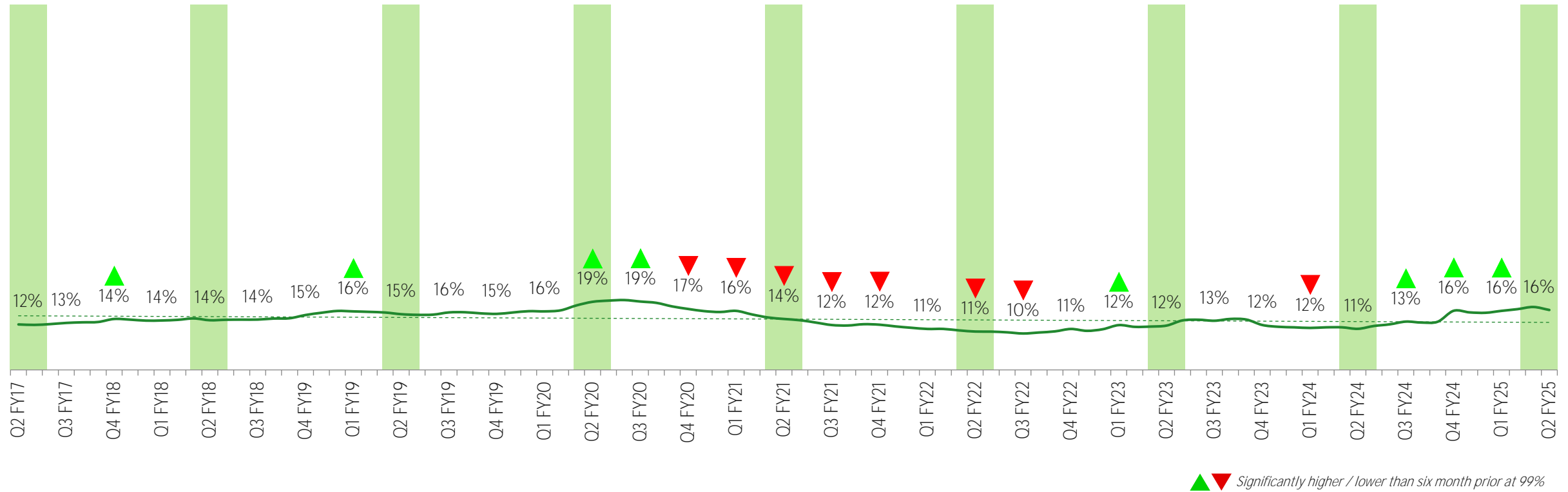
- Appeal is measured among the total online population aged 18 to 74 years old, and is the 'above the funnel' measure
- Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals
- Appeal is likely to be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



# The AC incidence in Germany has been growing over the last year

## Incidence of ACs

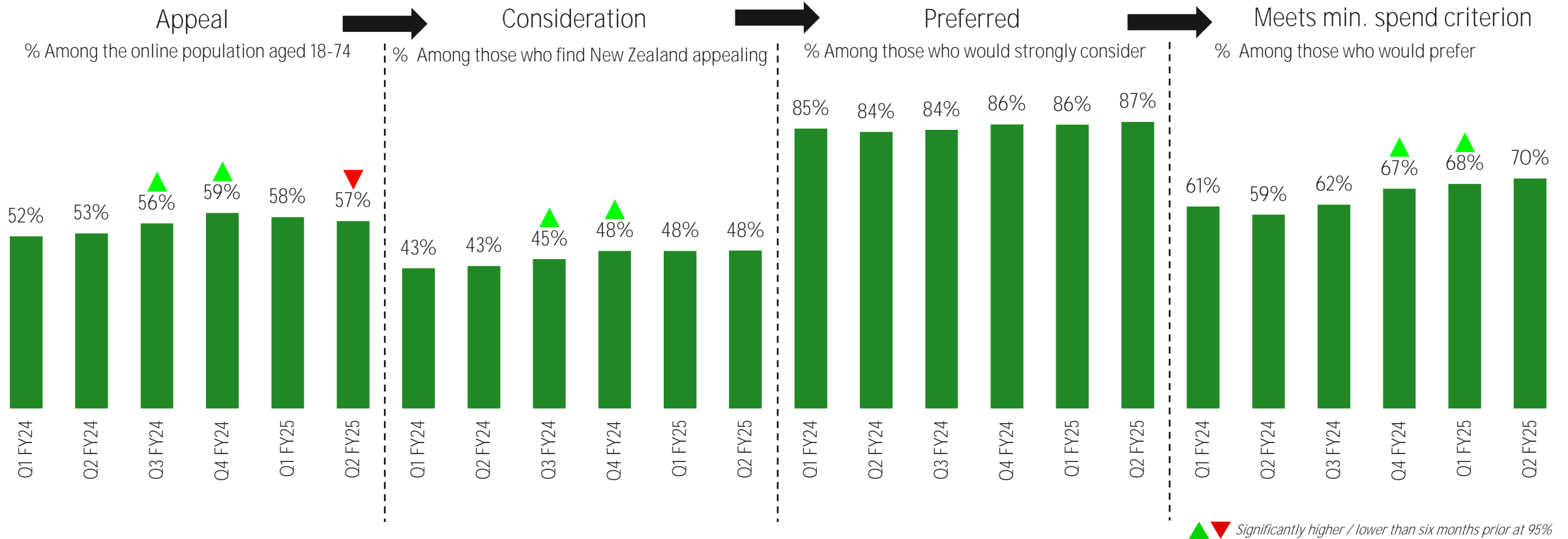
AC Monitor | 6MRA | Target online population aged 18-74



The weakest spot in the funnel is the conversion from Appeal to Consideration - therefore, it is essential to understand how to grow the top of the funnel

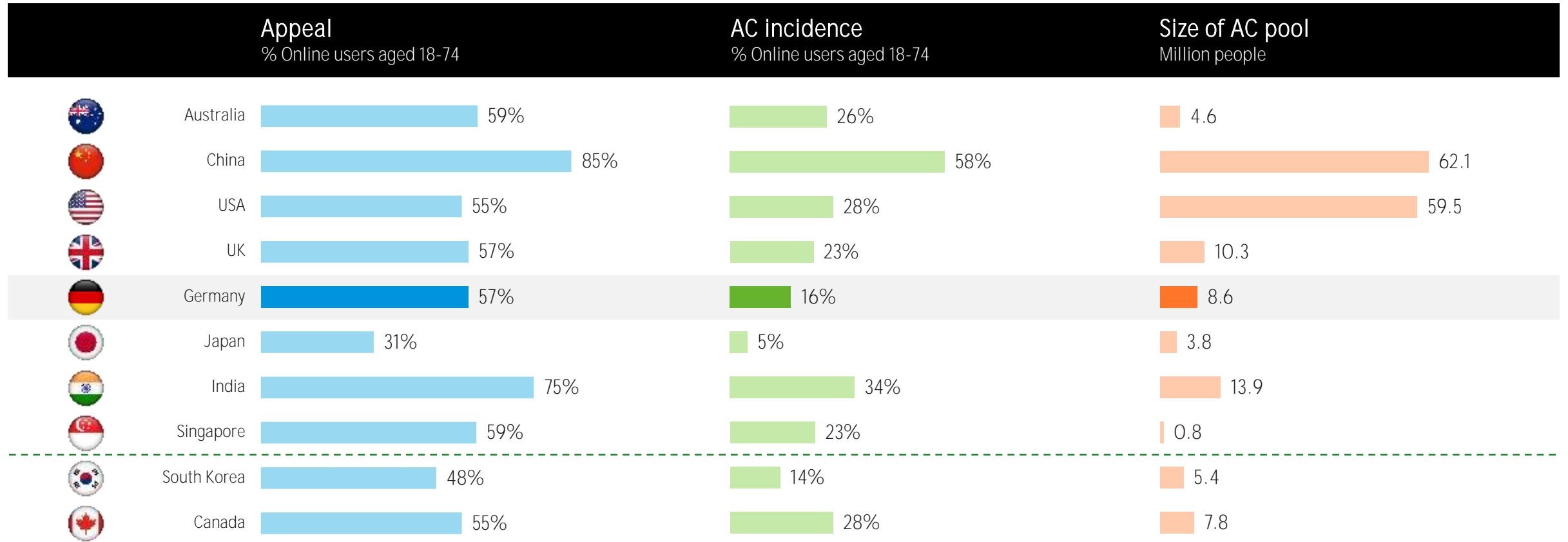
### Conversion of ACs through the Consideration Funnel

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



1. Sample size: Q1 FY24 – Q2 FY25 (6MRA): Appeal n = 9473, 9763, 8376, 7225, 7070, 5597 | Consider n = 4872, 5131, 4640, 4177, 4020, 3122 | Prefer n = 1852, 1945, 1869, 1772, 1714, 1317 | Spend n = 1540, 1595, 1555, 1496, 1440, 1118
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?"

# With 8.6 million ACs, Germany continues to present a healthy opportunity to drive arrivals



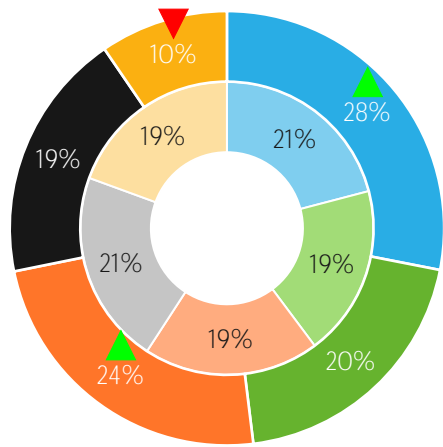
Compared to non-ACs, ACs are more likely to be aged 18 - 29 or 40 - 49 years old, male, and live in East Germany; 42% of the AC pool have pre-school or school aged children

### Profile of Active Considerers

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

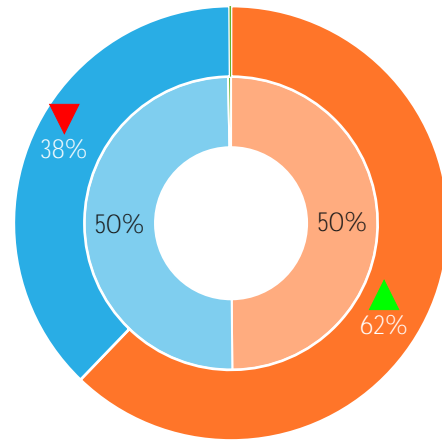
Outer ring: German Active Considerers  
Inner ring: German non-Active Considerers

By age segment



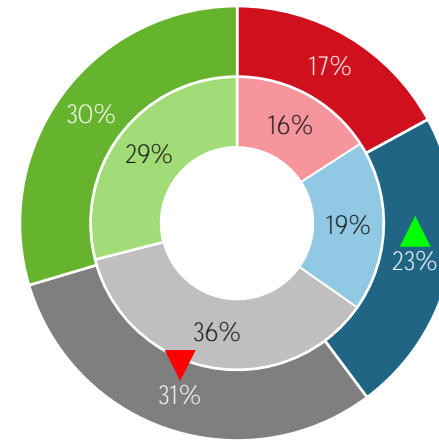
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



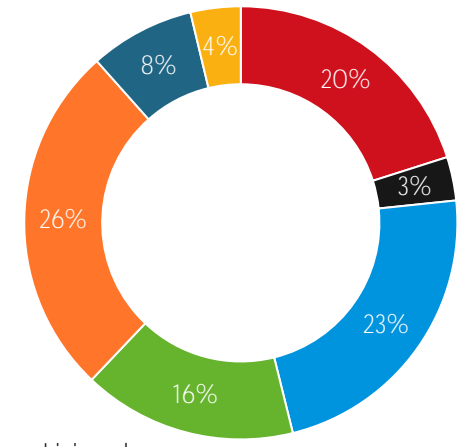
- Male
- Female
- Gender diverse

By region



- North
- East
- Central
- South

Household Composition



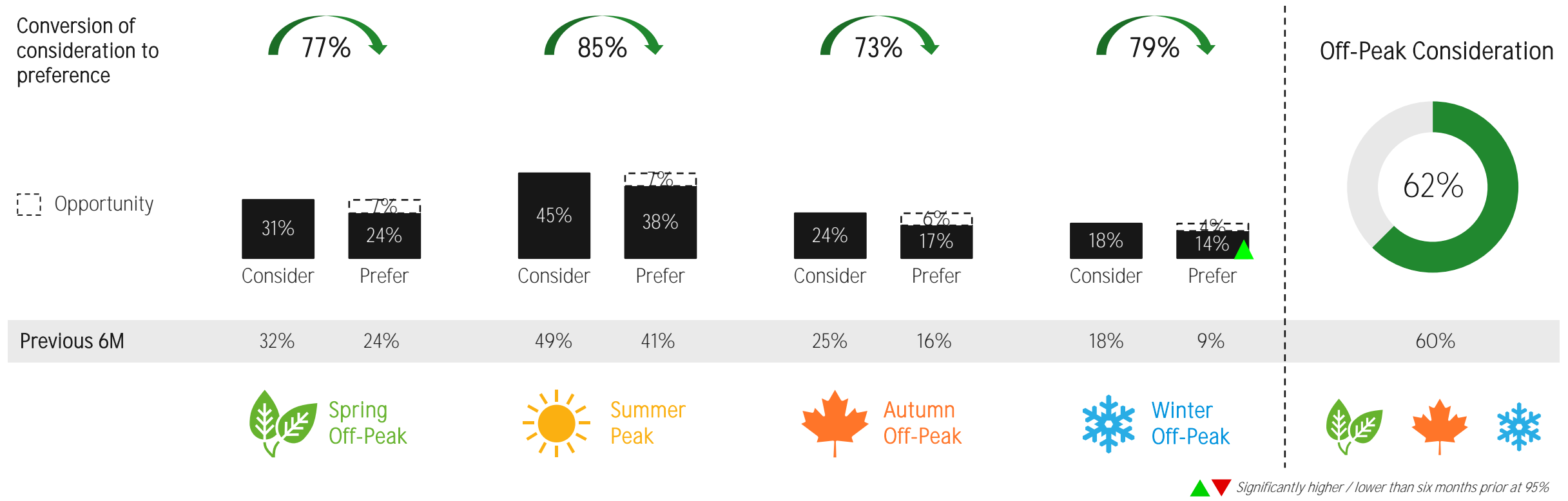
- Living alone
  - Living with friends / flat mates
  - Couple - no children
  - Family with mainly pre-school children
  - Family with mainly school-age children
  - Family with mainly independent children
  - Living at home with my parents
- ▲ ▼ Significantly higher / lower than non-ACs

# Total off-peak consideration remains stable at 62% but preference to visit New Zealand in winter has recently risen; spring is the primary opportunity to drive off-peak arrivals



## Seasons – Consideration & Preference

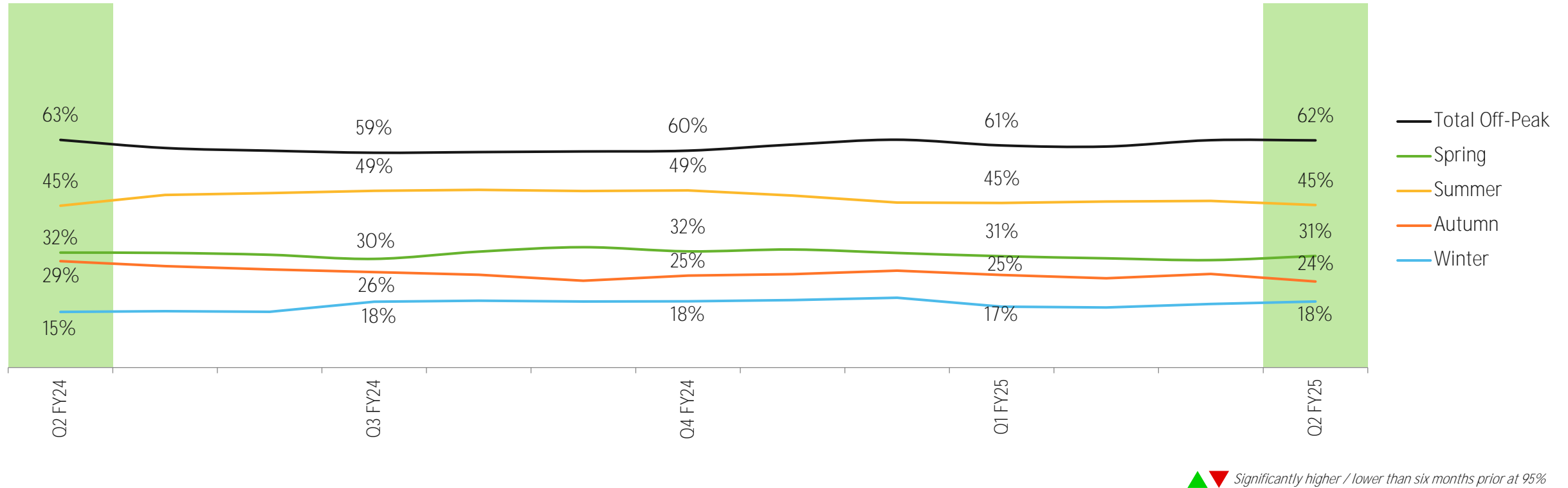
AC Monitor | Current 5 Months | Total Active Considerers



# Consideration to travel to New Zealand across the seasons has remained relatively stable over the last year

## Seasonal consideration

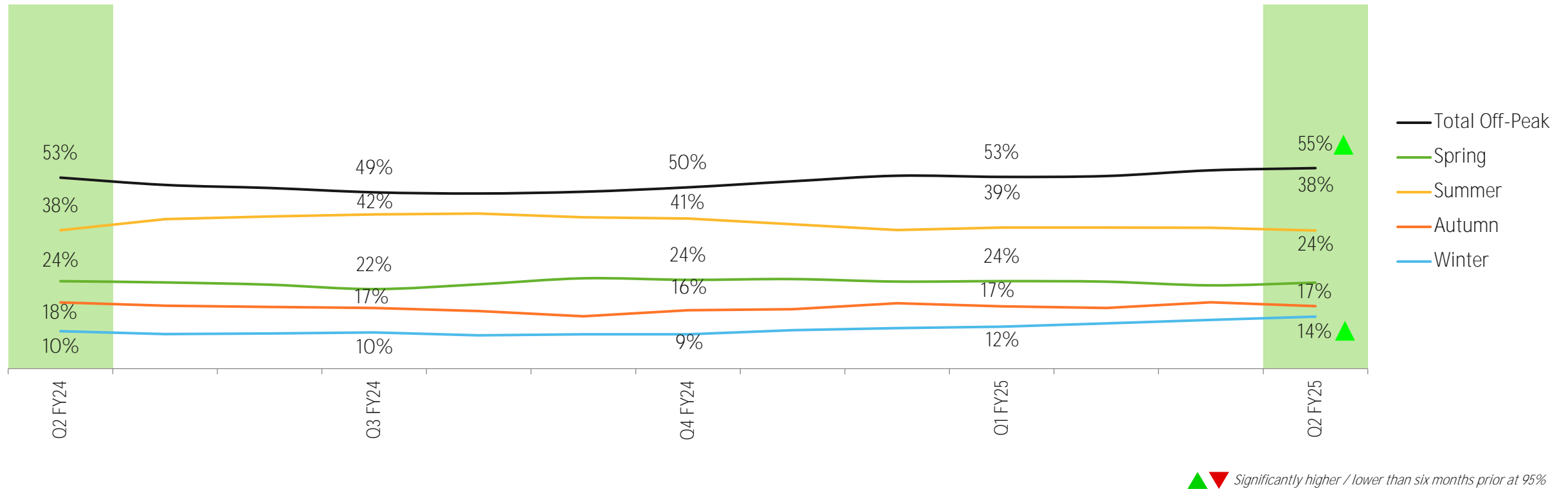
AC Monitor | 6MRA | Total Active Considerers



Preference to travel to New Zealand during off-peak seasons has increased over the last few quarters, driven by an increase in preference for winter

### Seasonal Preference

AC Monitor | 6MRA | Total Active Considerers





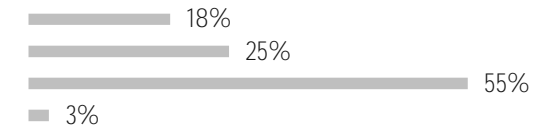
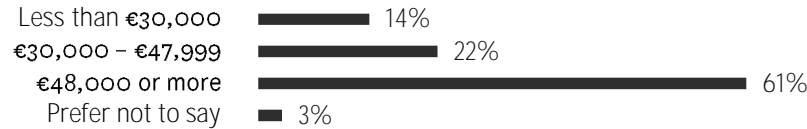
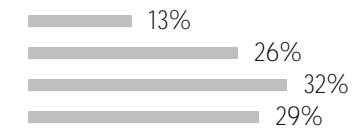
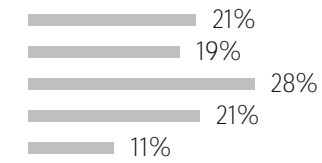
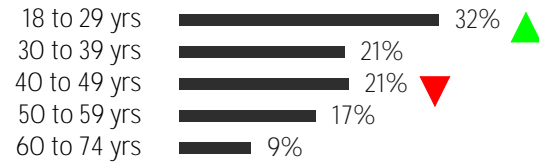
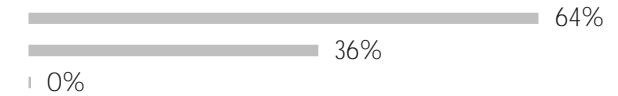
# Compared to peak-only considerers, the demographic profile of off-peak considerers skews younger and towards those in North Germany

## Profile of off-peak considerers

AC Monitor | Current 5 Months | off-peak considerers



## Peak-Only Considerers



The demographic profiles of considerers of each season vary, with winter considerers skewing younger and towards young families while spring considerers skew female, older and away from families with dependent children

### Profile of seasonal considerers

AC Monitor | Current 5M |  
Total Active Considerers



Spring  
Off-Peak



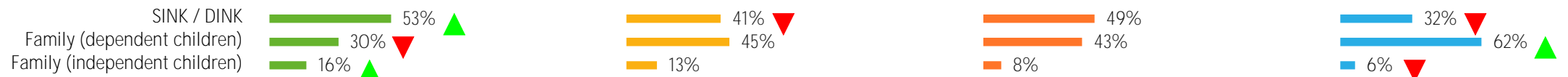
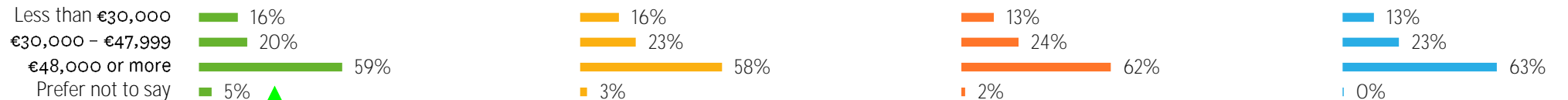
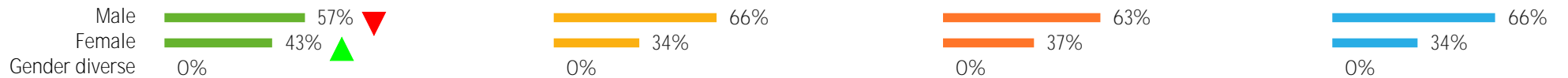
Summer  
Peak



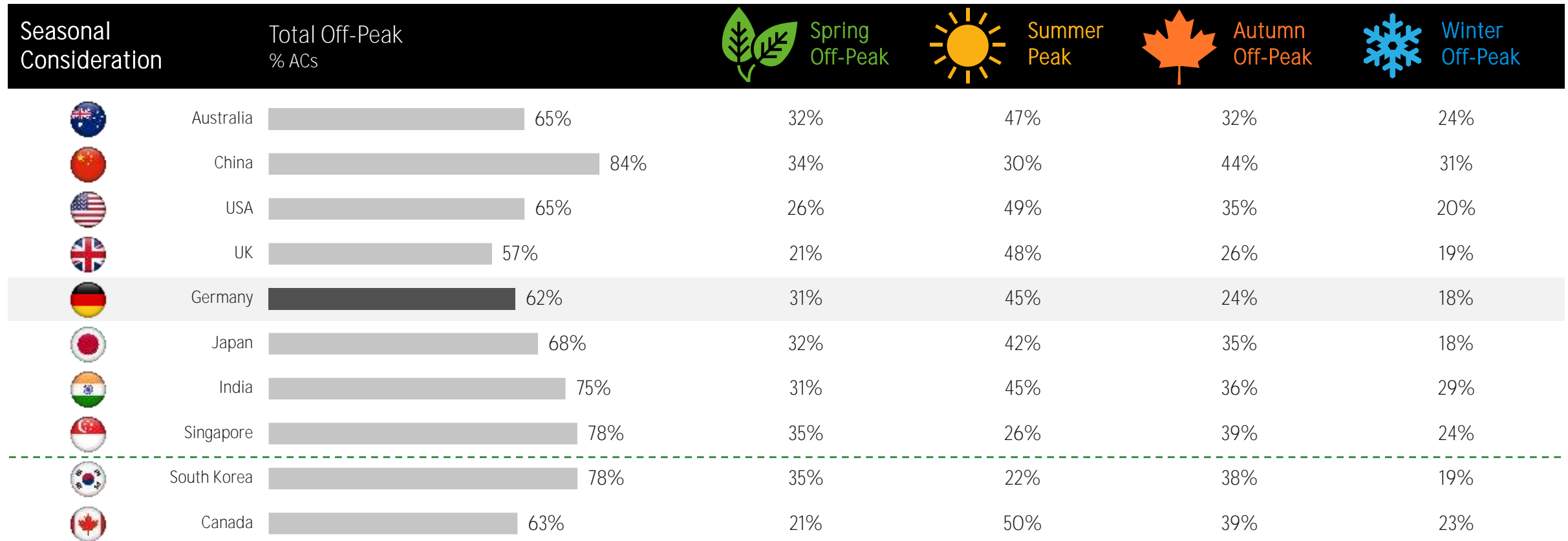
Autumn  
Off-Peak



Winter  
Off-Peak



With 62% ACs considering travelling to New Zealand during off-peak seasons, the opportunity to drive off-peak arrivals among German ACs is sizeable



6

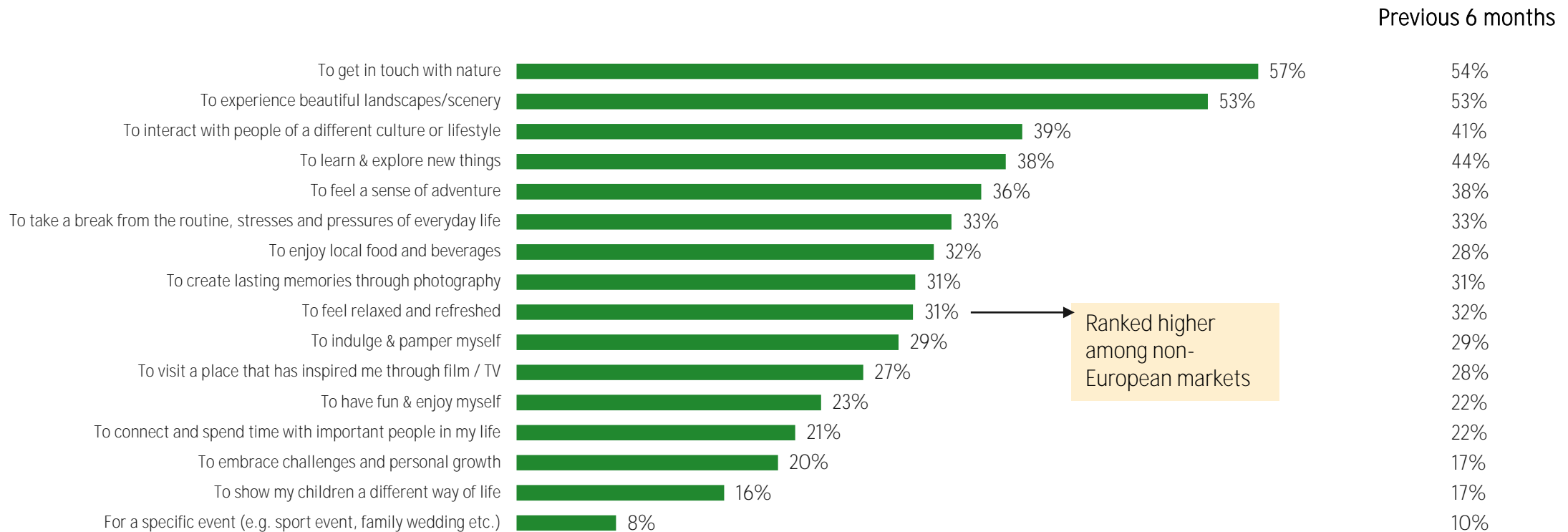
How can TNZ drive desirability of New Zealand as a holiday destination?



# Marketing messages should emphasise New Zealand’s scenery, nature and people given that these represent key motivations for visiting and remain consistent over time

## Reasons to visit New Zealand for a holiday

AC Monitor | Current 5 Months | Total Active Considerers



Ranked higher among non-European markets

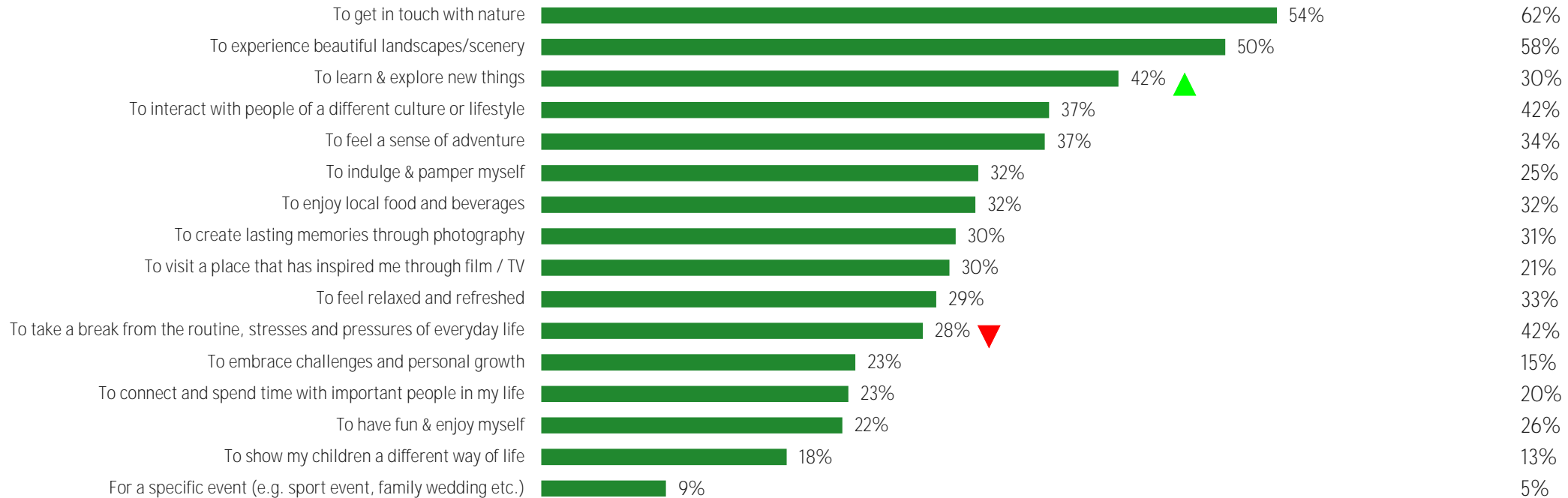
▲ ▼ Significantly higher / lower than previous period

Off-peak considerers have similar motivations to visit New Zealand as ACs as a whole, but are more likely to be inspired to visit to learn and explore new things – thus, when targeting off-peak, it is worth dialling up these opportunities

### Reasons to visit New Zealand for a holiday

AC Monitor | Current 5 Months | off-peak considerers

Peak-only Considerers

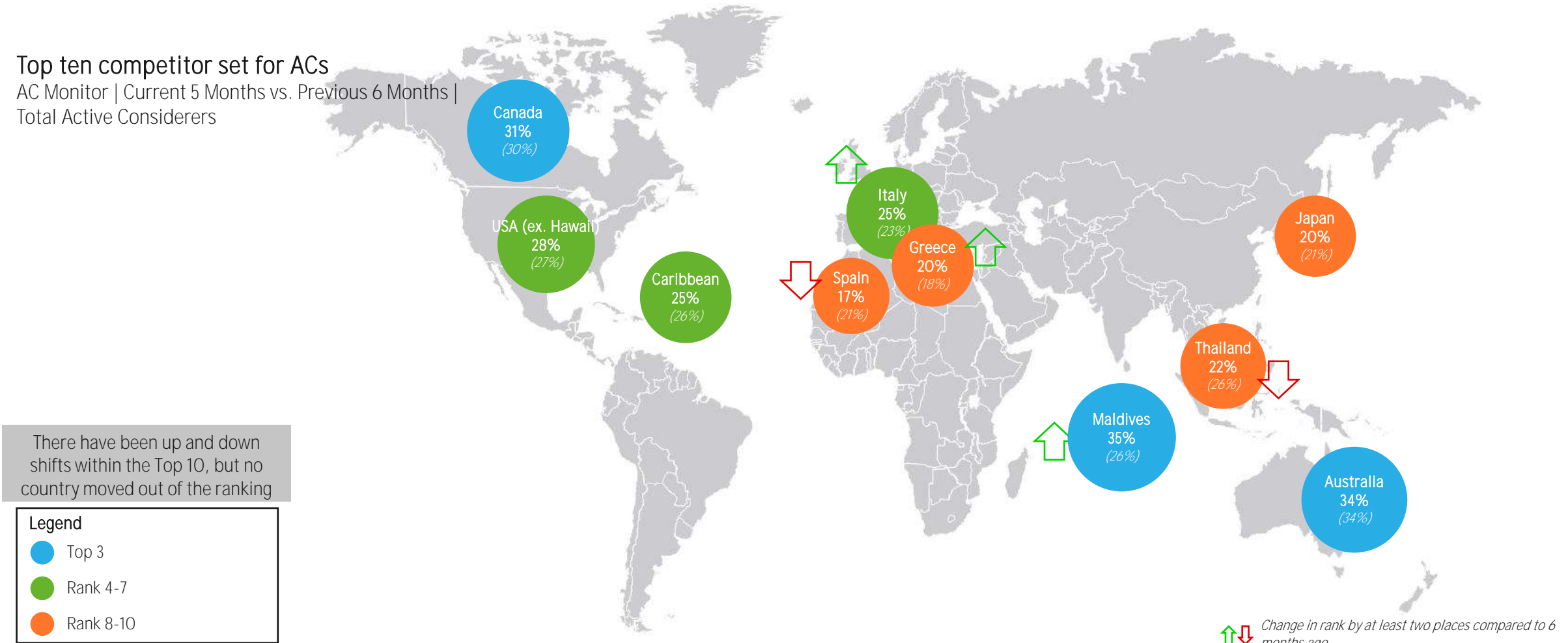


▲ ▼ Significantly higher / lower than Peak-Only Considerers

# The Maldives has risen up the rankings to be New Zealand's top competitor, followed by Australia and Canada; some European destinations have also risen in rankings while Thailand has dropped

## Top ten competitor set for ACs

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



There have been up and down shifts within the Top 10, but no country moved out of the ranking

**Legend**

- Blue circle: Top 3
- Green circle: Rank 4-7
- Orange circle: Rank 8-10

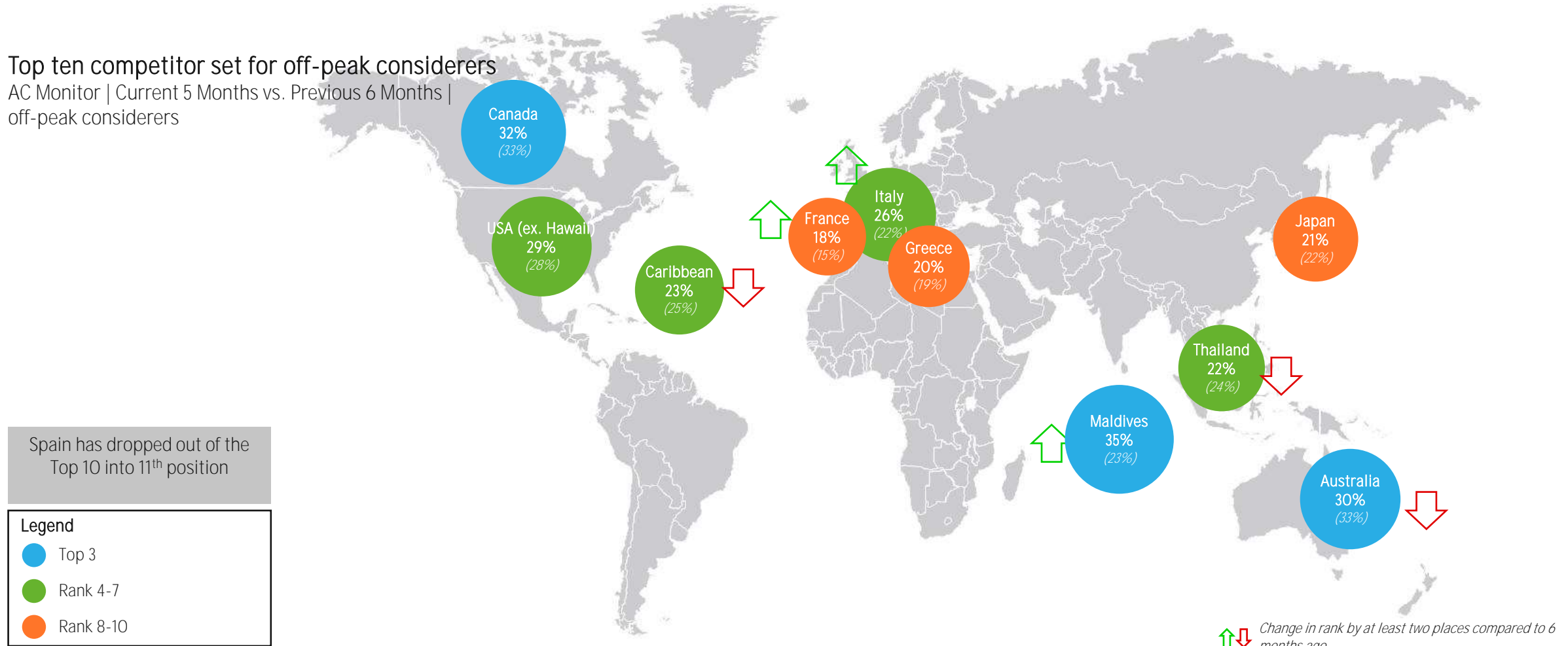
↑↓ Change in rank by at least two places compared to 6 months ago

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?"

# The top three competitors are the same for the off-peak considerers, but they prefer France over Spain

## Top ten competitor set for off-peak considerers

AC Monitor | Current 5 Months vs. Previous 6 Months | off-peak considerers



Spain has dropped out of the Top 10 into 11<sup>th</sup> position

### Legend

- Blue circle: Top 3
- Green circle: Rank 4-7
- Orange circle: Rank 8-10

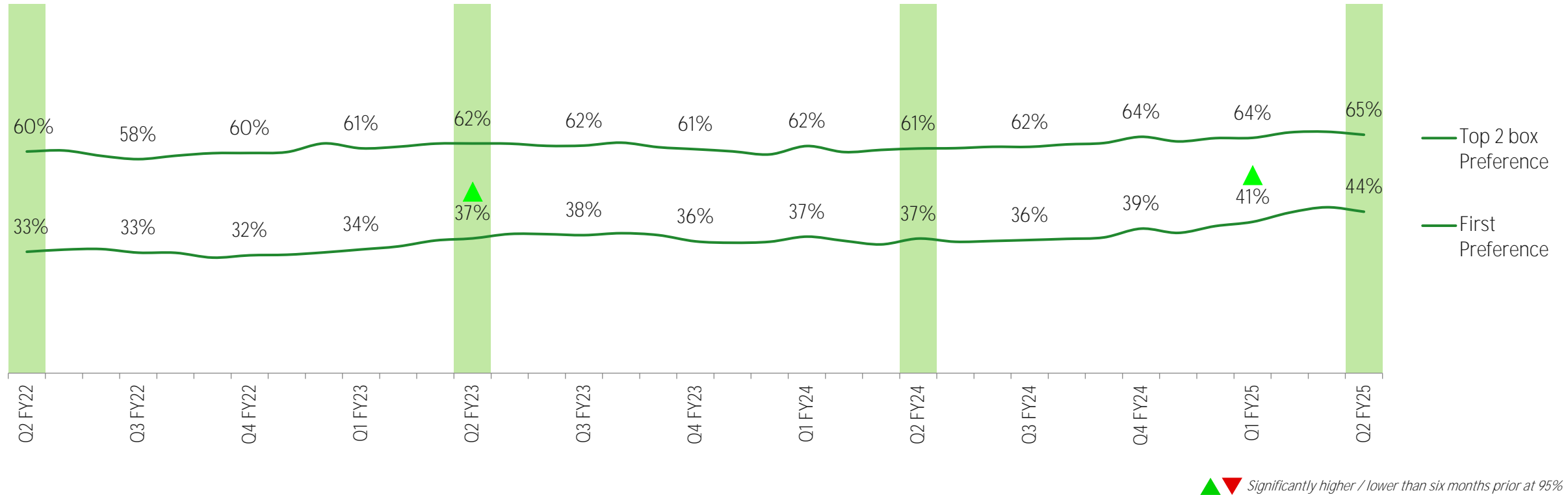
↑ ↓ Change in rank by at least two places compared to 6 months ago



# Among ACs, first-choice preference for New Zealand has reached a high of 44%

## New Zealand Preference KPI

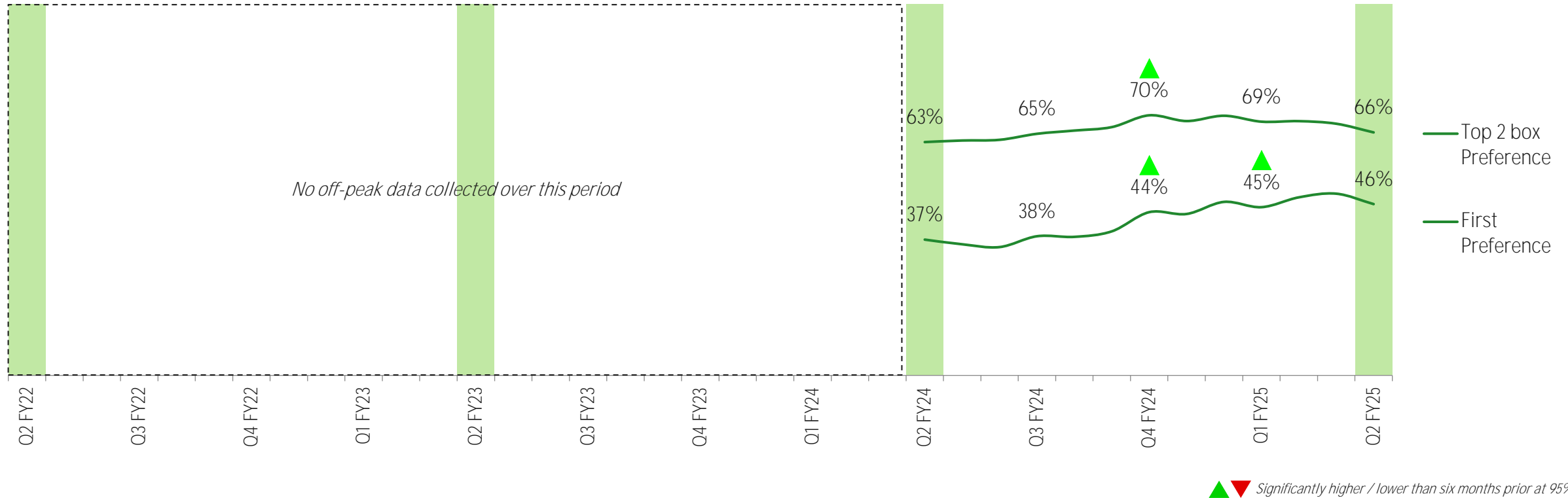
AC Monitor | 6MRA | Total Active Considerers



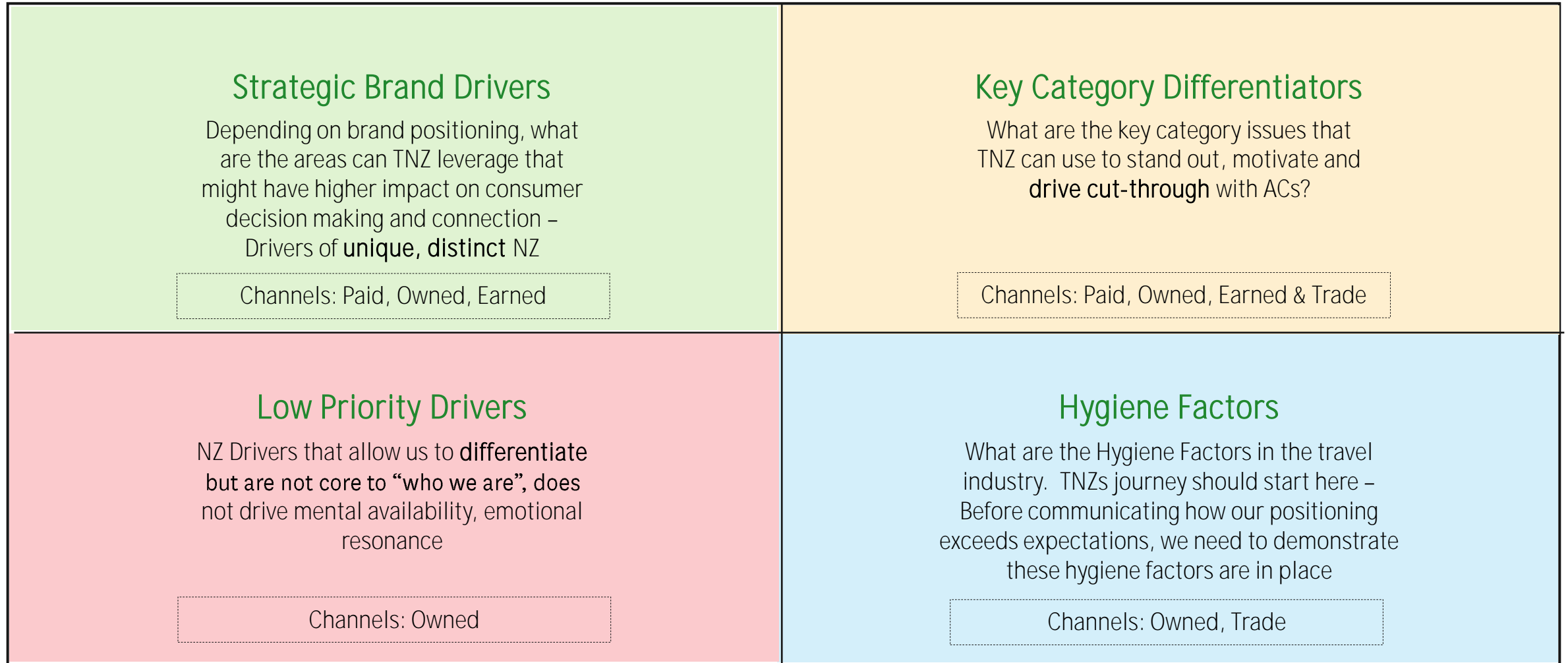
# Among off-peak considerers, first-choice preference has maintained peak levels

## New Zealand Preference KPI for off-peak considerers

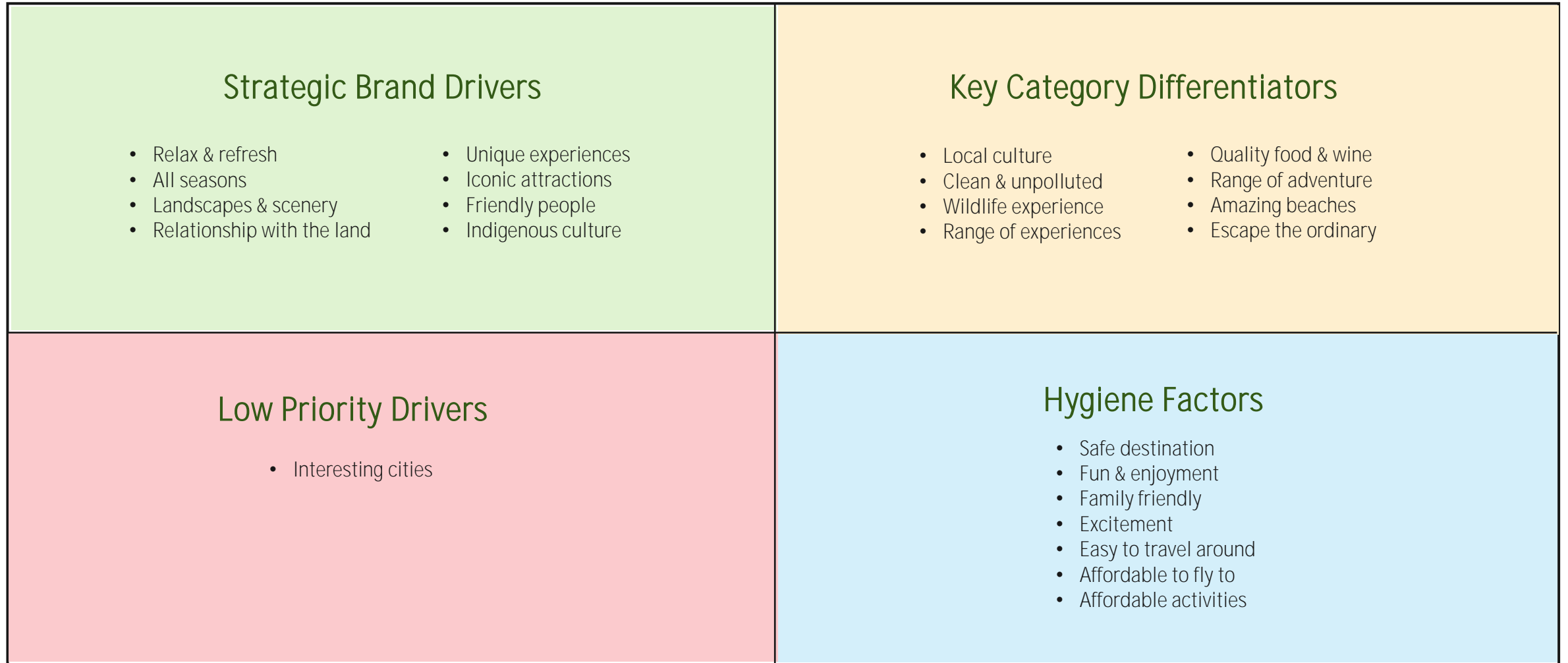
AC Monitor | 6MRA | off-peak considerers



# A framework to organise and optimise the brand associations that matter



## Categorising brand associations to the framework...



# 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

Key drivers of preference for New Zealand remain broadly stable with last year, although range of experiences and indigenous culture have emerged as a stronger drivers of preference in 2024

### Drivers of preference for NZ

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

Latest results	2024 rank	2023 rank	2022 rank <sup>(1)</sup>
Landscapes & scenery	1	2	1
Unique experiences	2	3	4
Excitement	3	6	*
Range of experiences	4 <span>↑</span>	9 <span>↓</span>	3
Range of adventure	5	7	7
Escape the ordinary	6	5 <span>↑</span>	13
Safe destination	7 <span>↓</span>	1 <span>↑</span>	6
Local culture	8	12 <span>↓</span>	8
Indigenous culture	9 <span>↑</span>	18	18
Clean & unpolluted	10	11	14
Relationship with the land	11	8	9
Friendly people	12	10 <span>↓</span>	5
All seasons	13	15	17
Amazing beaches	14 <span>↑</span>	19	*
Relax & refresh	15	16 <span>↑</span>	21

	2024 rank	2023 rank	2022 rank <sup>(1)</sup>
Interesting cities	16 <span>↑</span>	22	25
Wildlife experience	17	14 <span>↑</span>	20
Fun & enjoyment	18	17 <span>↑</span>	22
Iconic attractions	19	21 <span>↑</span>	26
Quality food & wine	20	20	24
Family friendly	21	23	27
Easy to travel around	22	25 <span>↑</span>	30
Affordable activities	23	24	28
Affordable to fly to	24	26 <span>↑</span>	31

Changes in brand attribution list affect comparability in ranking over time

Strategic Brand Drivers	Key Category Differentiators
Low Priority Drivers	Hygiene Factors

# 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 **'all seasons'** and **'relax'**

## Brand Associations of New Zealand x Impact on preference

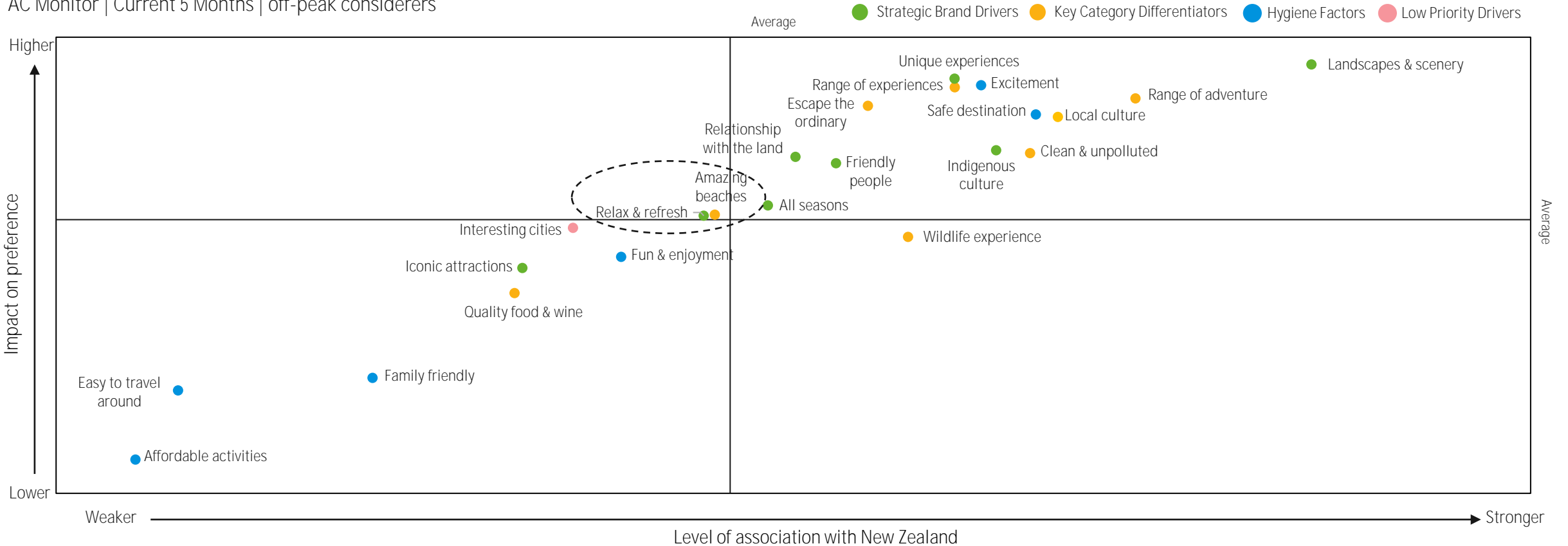
AC Monitor | Current 5 Months | Total Active Considerers



As with ACs at a total level, off-peak considerers rate New Zealand more favourably on higher vs. lower impact drivers, although relaxation and amazing beaches perform below average

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

AC Monitor | Current 5 Months | off-peak considerers





# New Zealand's top competitive strengths are its cleanliness, landscapes, indigenous culture and relationship with the land but more could be done to boost its competitive edge in other areas, particularly unique experiences, friendly people, all seasons and range of experiences

## Relative brand positioning for Strategic Brand Drivers and Key Category Differentiators

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

		New Zealand	Maldives	Australia	Canada	USA	Italy	
Strategic Brand Drivers	Landscapes & scenery	106	92	106	122	103	64	<b>Actions for TNZ:</b>  <b>Strengths:</b> <ul style="list-style-type: none"> <li>— Clean &amp; unpolluted</li> <li>— Indigenous culture</li> <li>— Relationship with the land</li> <li>— Landscapes &amp; Scenery</li> <li>— Range of adventure</li> <li>— Local culture</li> </ul> <b>Drivers to dial up:</b> <ul style="list-style-type: none"> <li>— Unique experiences</li> <li>— Friendly people</li> <li>— All seasons</li> <li>— Iconic attractions</li> <li>— Range of experiences</li> </ul>
	Unique experiences	101	105	107	102	111	72	
	Indigenous culture	120	94	127	92	79	74	
	Relationship with the land	108	82	107	99	90	109	
	Friendly people	102	100	107	96	81	113	
	All seasons	96	123	97	85	104	100	
	Relax & refresh	100	160	78	96	72	102	
	Iconic attractions	93	55	107	98	125	122	
Key Category Differentiators	Range of experiences	91	99	98	108	113	95	
	Range of adventure	106	77	110	120	103	76	
	Escape the ordinary	100	132	98	105	83	84	
	Local culture	106	93	110	89	100	96	
	Clean & unpolluted	138	114	90	118	48	75	
	Amazing beaches	95	156	107	54	104	92	
	Wildlife experience	105	62	128	143	91	59	
	Quality food & wine	100	83	88	86	99	147	

Relative to competitors, New Zealand performs poorly across most hygiene factors, particularly fun & enjoyment, ease of travelling around and affordability to fly to

### Relative brand positioning for Hygiene Factors and Low Priority

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

		New Zealand	Maldives	Australia	Canada	USA	Italy
Hygiene Factors	Excitement	97	118	88	108	106	87
	Safe destination	100	98	101	117	80	103
	Fun & enjoyment	88	113	95	88	128	95
	Family friendly	94	113	77	85	107	132
	Easy to travel around	87	87	83	80	109	164
	Affordable activities	102	92	88	92	106	122
	Affordable to fly to	86	89	76	98	110	152
Low Priority	Interesting cities	85	56	106	106	136	114

### Actions for TNZ:

#### Drivers to dial up:

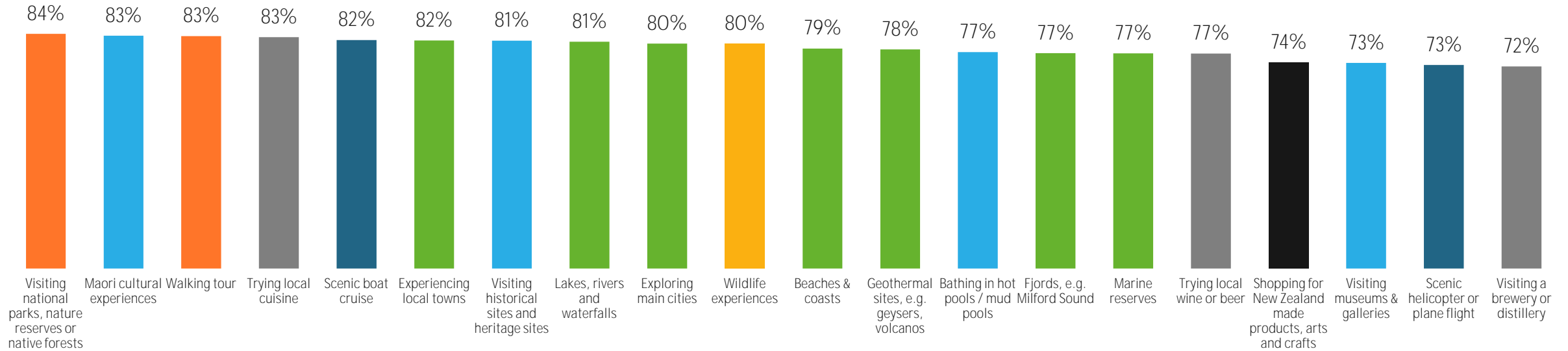
- Excitement
- Fun & enjoyment
- Family friendly
- Easy to travel around
- Affordability to fly to

The most common activities of interest are related to walking, culture and local cuisine providing an opportunity to promote these opportunities to drive conversion

### Activities interested in doing in New Zealand (Top 20)

AC Monitor | Current 5 Months | Total Active Considerers

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



#### off-peak considerers



7

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

## 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)

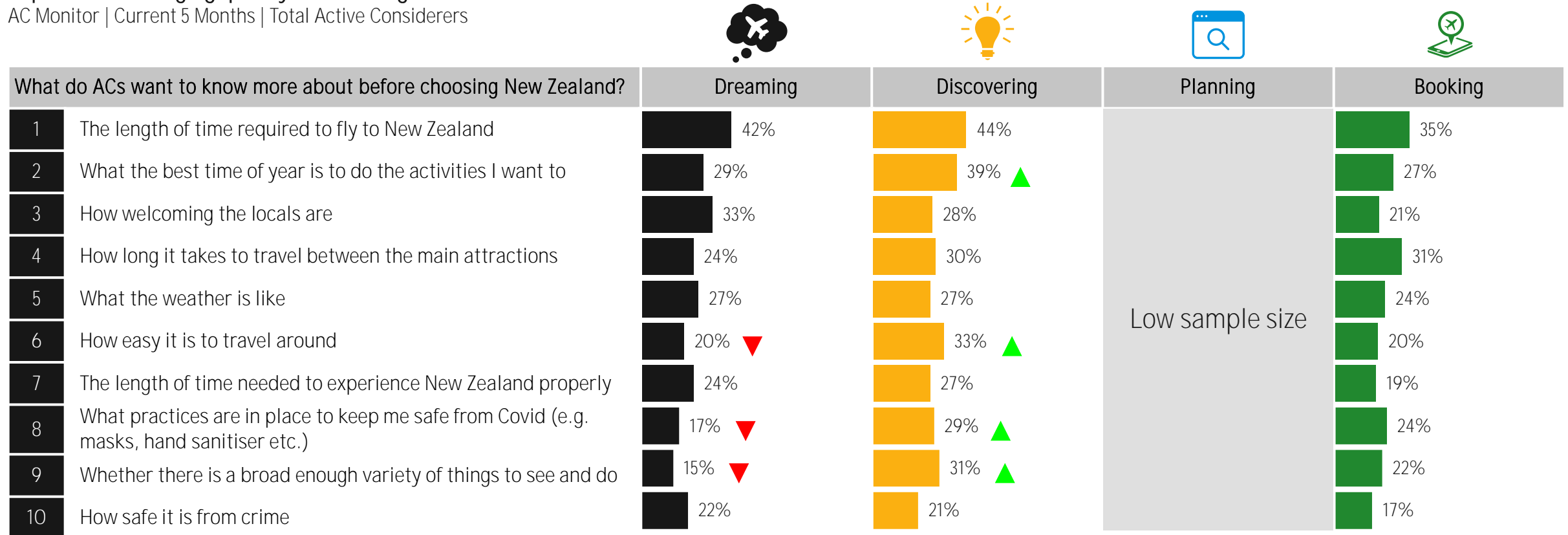
What do ACs want to know more about before choosing New Zealand?		Now	Previous 6 months
1	The length of time required to fly to New Zealand	42%	38%
2	What the best time of year is to do the activities I want to	33%	NA
3	How welcoming the locals are	29%	28%
4	How long it takes to travel between the main attractions	27%	23%
5	What the weather is like	26%	31%
6	How easy it is to travel around	25%	28%
7	The length of time needed to experience New Zealand properly	25%	26%
8	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	23%	19%
9	Whether there is a broad enough variety of things to see and do	22%	20%
10	How safe it is from crime	21%	17%

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

# Dialling up messaging around the best time of year to do certain activities will have the greatest impact on Discoverers

## Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5 Months | Total Active Considerers



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

# Compared to non-considerers, off-peak considerers have a greater need for understanding the travel time between main attractions

## Top ten knowledge gaps for off-peak considerers

AC Monitor | Current 5 Months | off-peak considerers

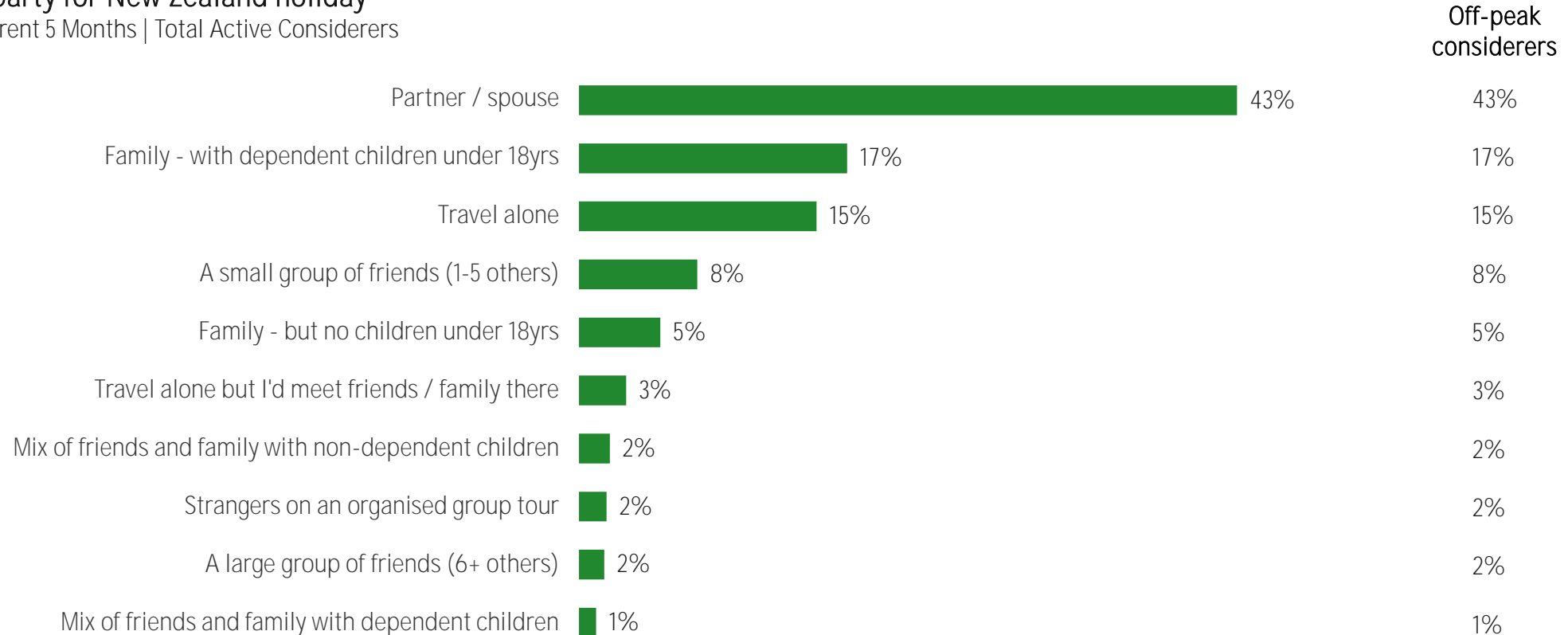
What do ACs want to know more about before choosing New Zealand?		off-peak considerers	Peak-only considerers
1	The length of time required to fly to New Zealand	41%	43%
2	What the best time of year is to do the activities I want to	32%	35%
3	How welcoming the locals are	28%	32%
4	How long it takes to travel between the main attractions	31% ▲	21%
5	What the weather is like	26%	27%
6	How easy it is to travel around	25%	25%
7	The length of time needed to experience New Zealand properly	27%	21%
8	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	21%	26%
9	Whether there is a broad enough variety of things to see and do	21%	24%
10	How safe it is from crime	24%	16%

▲ ▼ Significantly higher / lower than Peak-Only Considerers

# German 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 5 Months | Total Active Considerers



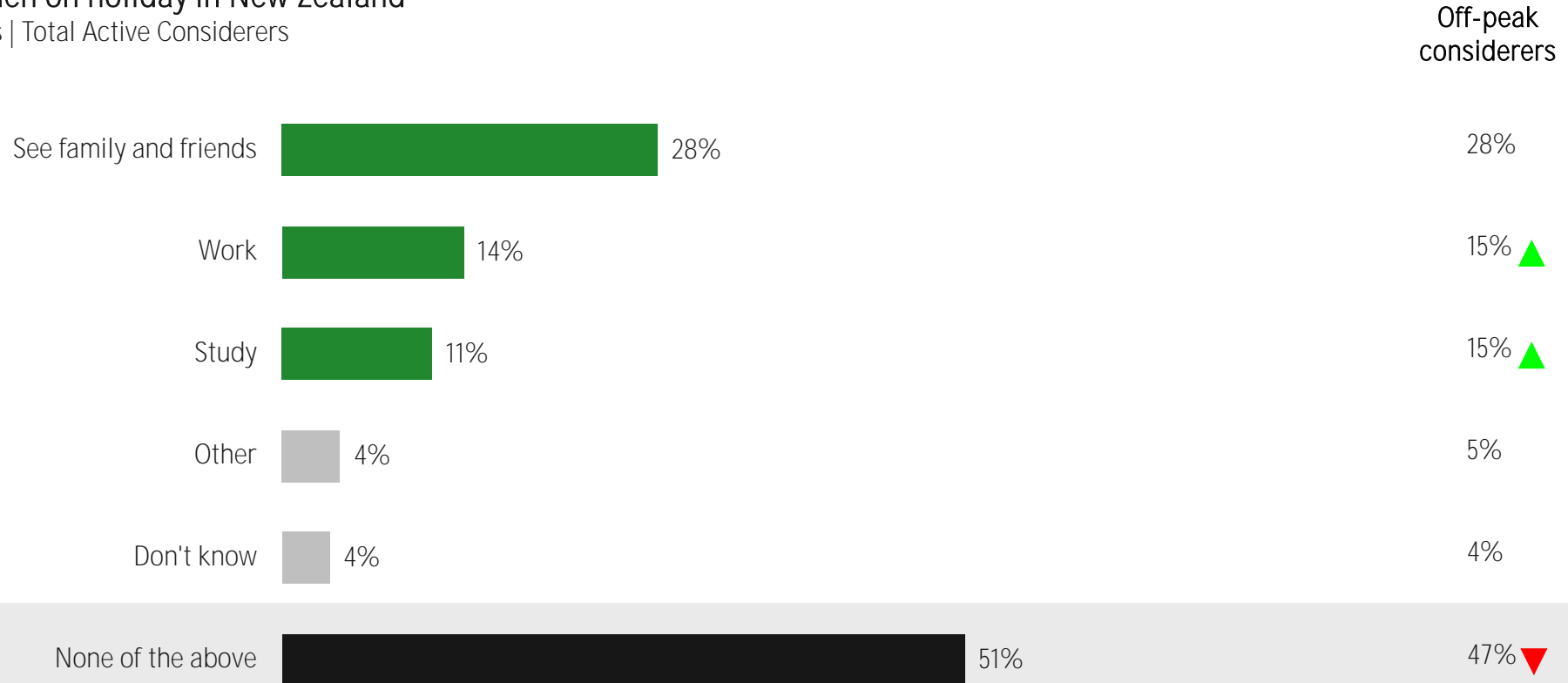
▲ ▼ Significantly higher / lower than Peak-Only Considerers



Over half of the AC pool intend to visit New Zealand for a holiday only, while 28% would look to visit family and friends; off-peak considerers are more likely to work or study during their holiday

### Additional intentions when on holiday in New Zealand

AC Monitor | Current 5 Months | Total Active Considerers



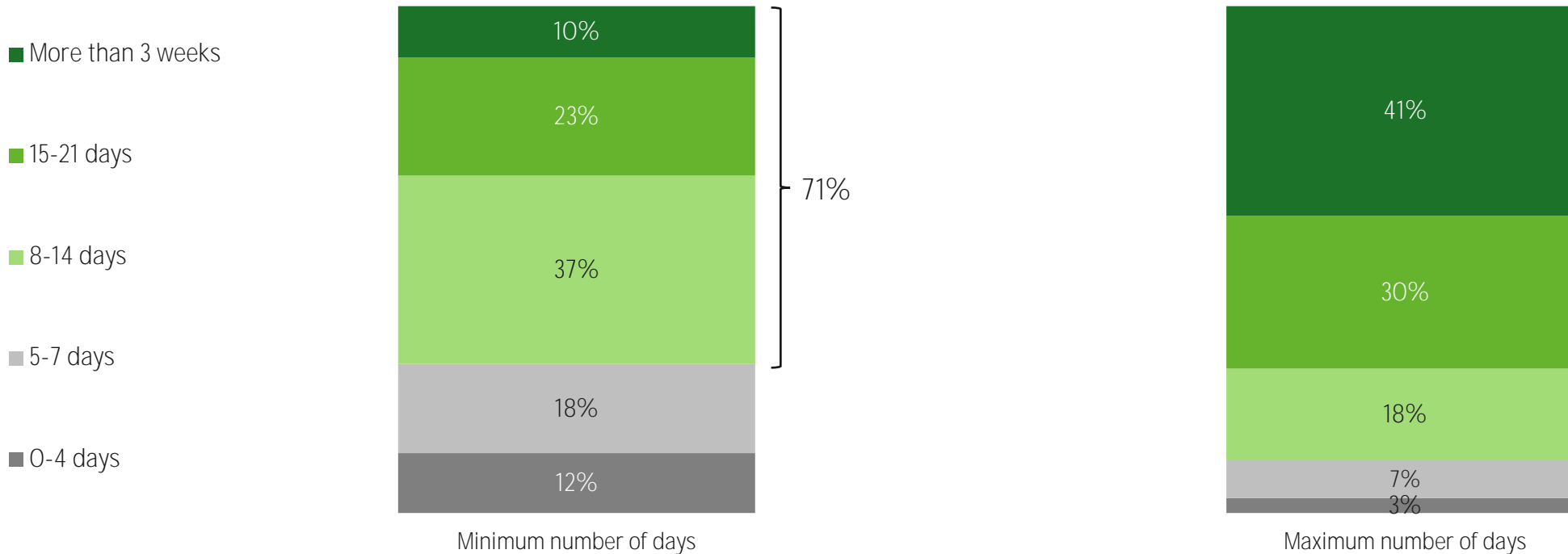
*This represents ACs who are considering travelling to New Zealand for a holiday ONLY*

▲ ▼ Significantly higher / lower than Peak-Only Considerers

The vast majority of ACs would spend at least a week in New Zealand while 41% are open to travelling for more than three weeks

### Ideal minimum and maximum numbers of days spent on holiday in New Zealand

AC Monitor | Current 5 Months | Total Active Considerers

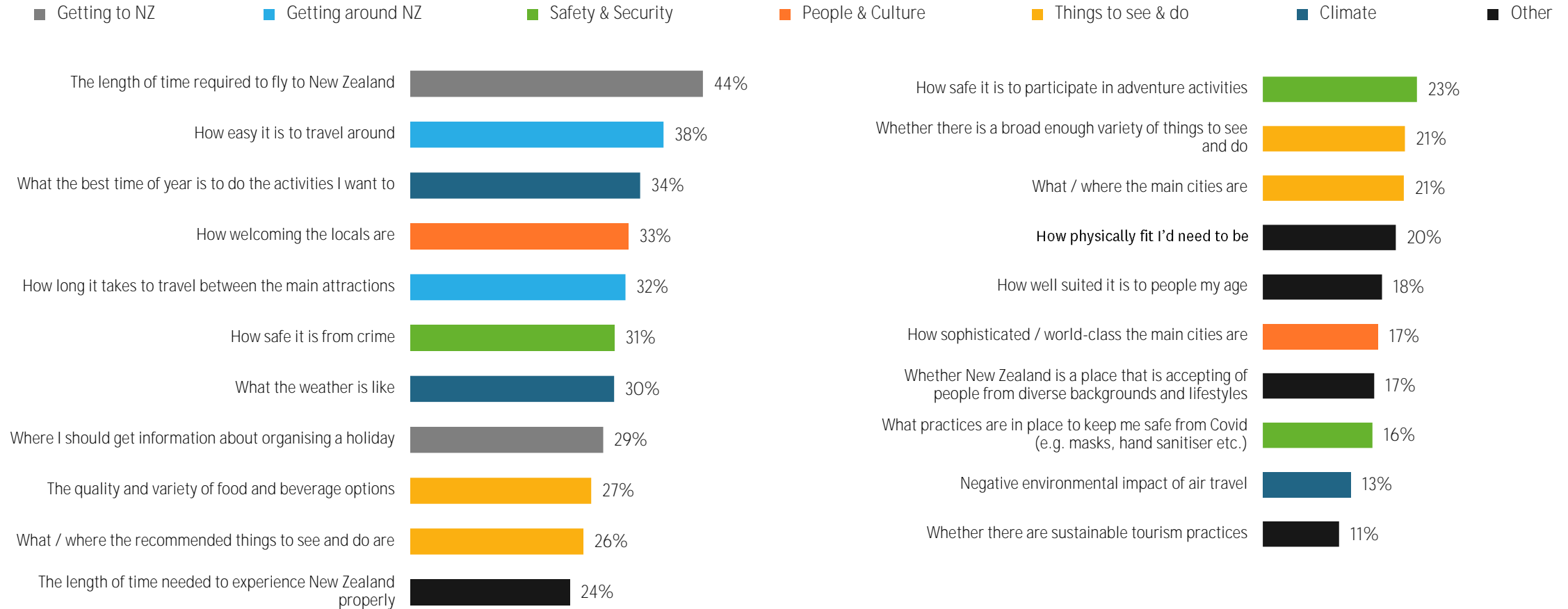


# 9 | Appendix



# Knowledge gaps (full list)

AC Monitor | Current 5 Months | Total Active Considerers

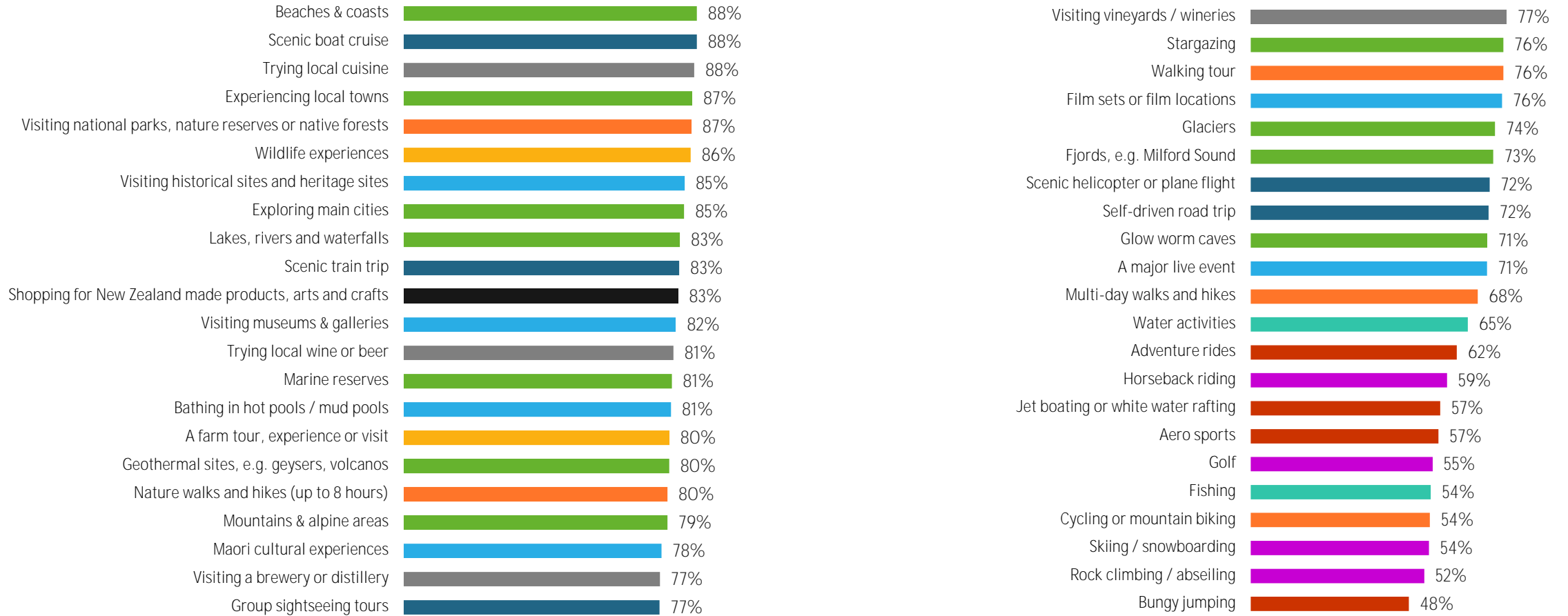


# Activities interested in doing in New Zealand (full list)

AC Monitor | Current 5 Months | Total Active Considerers



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

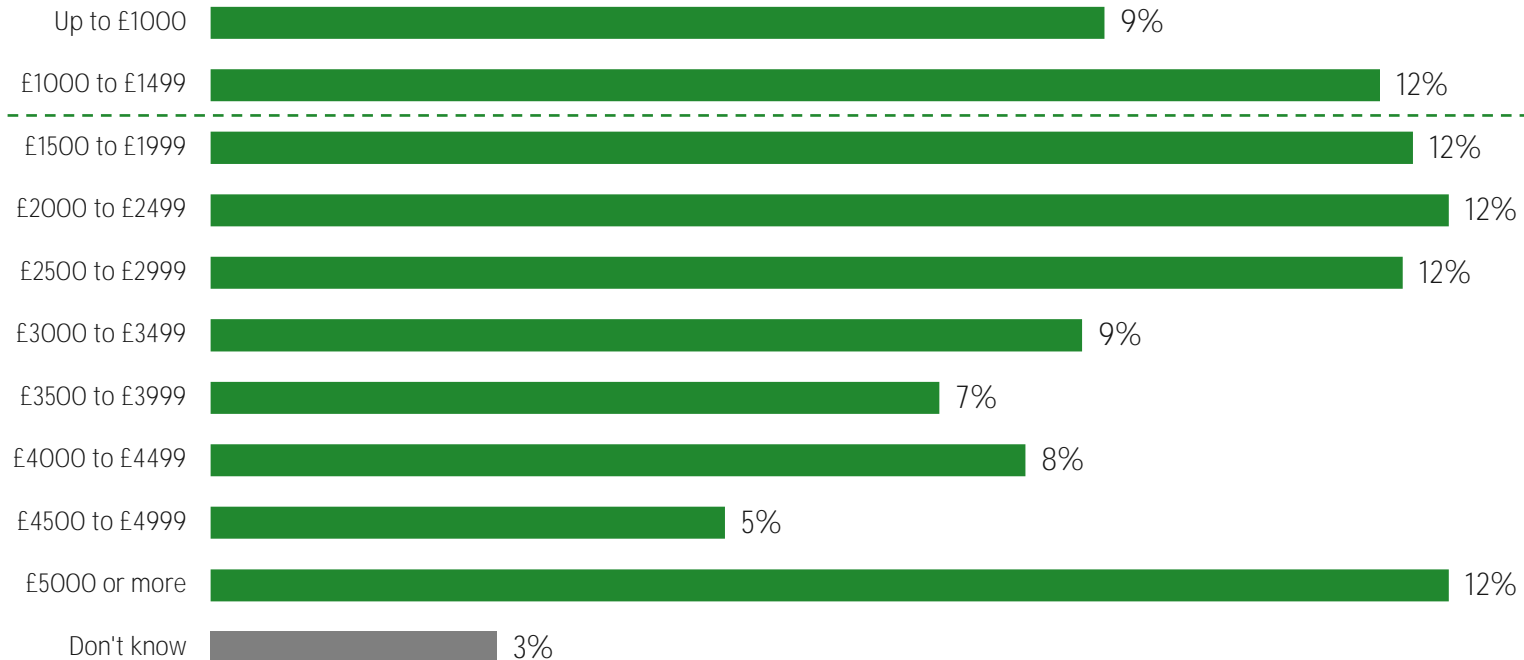


Of those who agree that New Zealand is a preferred destination, 20% do not meet the spend threshold of £1500



### Spend on holiday in New Zealand

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



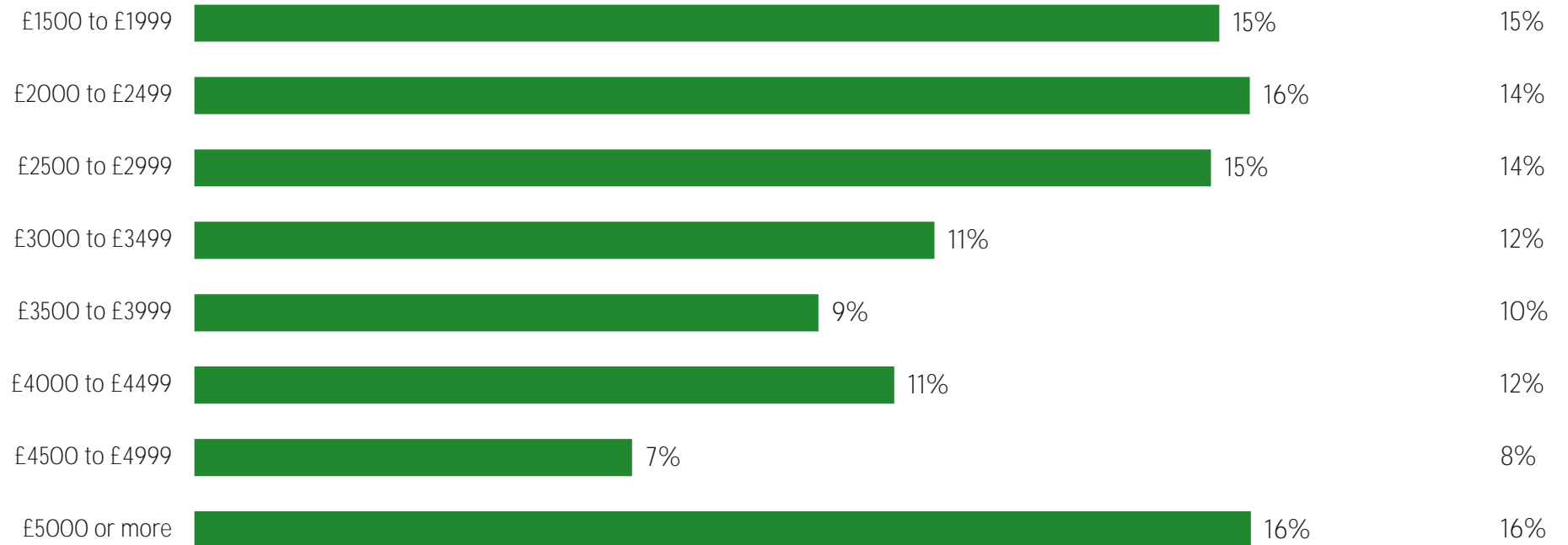
The AC pool is broadly split between those who would spend up to £2999 on a holiday in New Zealand, and those who would spend more



### Spend on holiday in New Zealand among ACs

AC Monitor | Current 5 Months | Total Active Considerers

Off-Peak Considerers



  Significantly higher / lower than Peak-Only Considerers



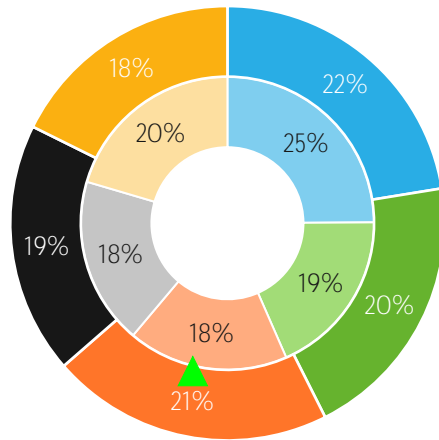
Compared to those who do not find New Zealand appealing, those who do are skewed towards those aged 40 - 49 years

### Profile of those who find New Zealand highly appealing

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

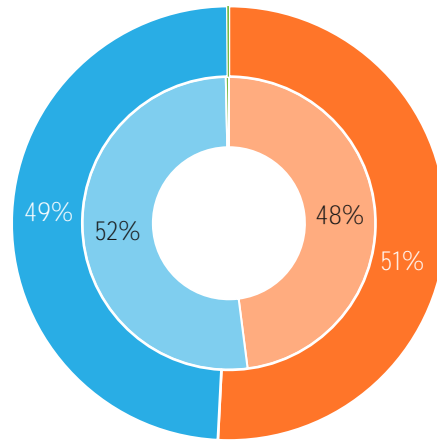
Outer ring: Those who find NZ highly appealing  
Inner ring : Those who do not find New Zealand highly appealing

By age segment



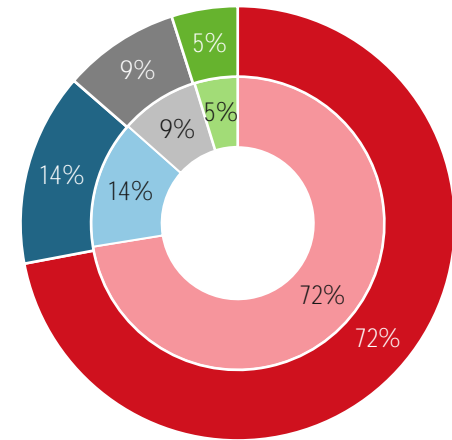
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



- Male
- Female
- Gender diverse

By region



- England
- London
- Scotland
- Wales

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



# The demographic profile of those who would seriously consider visiting New Zealand versus those who would not is swayed towards 18 - 39 year olds, and those who live in London

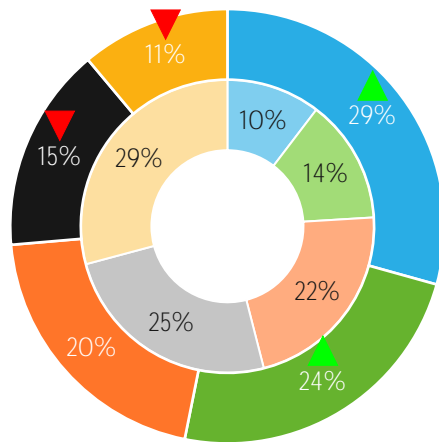


## Profile of those who would seriously consider visiting New Zealand

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

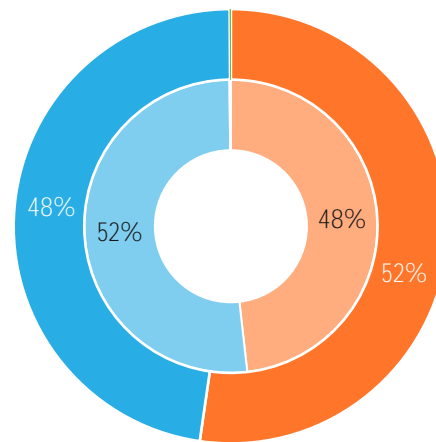
Outer ring: Those who would seriously consider visiting New Zealand  
 Inner ring : Those who would not seriously consider visiting New Zealand

By age segment



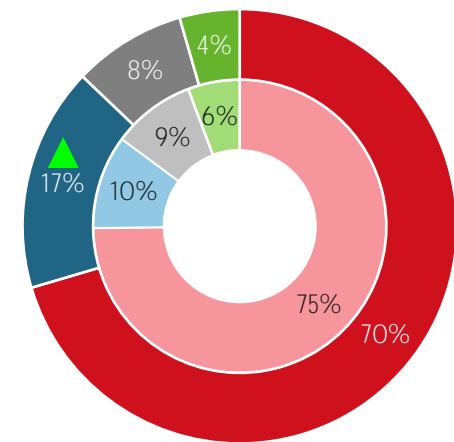
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



- Male
- Female
- Gender diverse

By region



- England
- London
- Scotland
- Wales

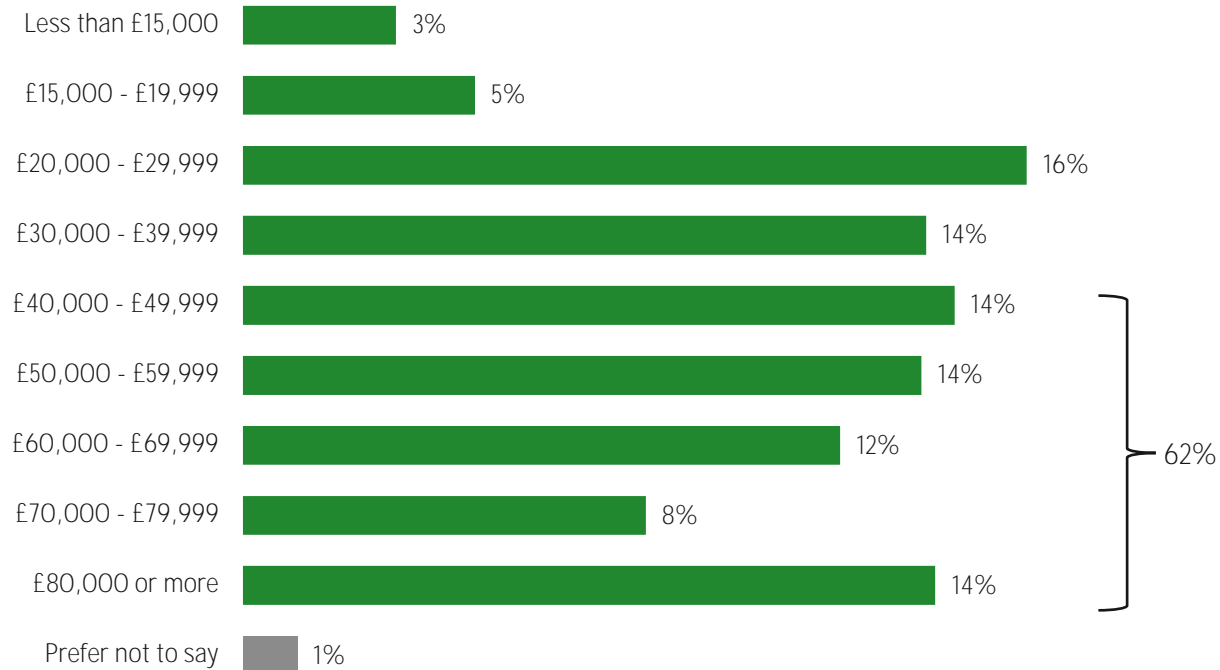
▲ Significantly higher / lower than those who would not seriously consider

62% of ACs have an annual household income of over £40,000



## Household Income

AC Monitor | Current 5 Months | Total Active Considerers

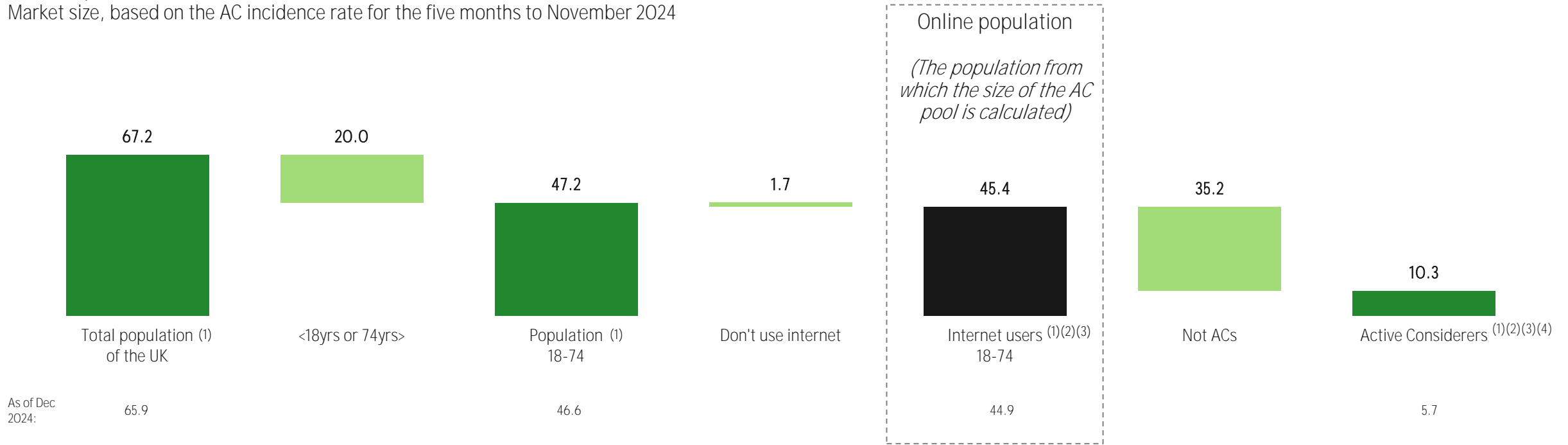


Out of an online population of approximately 45.4 million people, 10.3 million are classified as ACs



Nov 24 | Million people

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

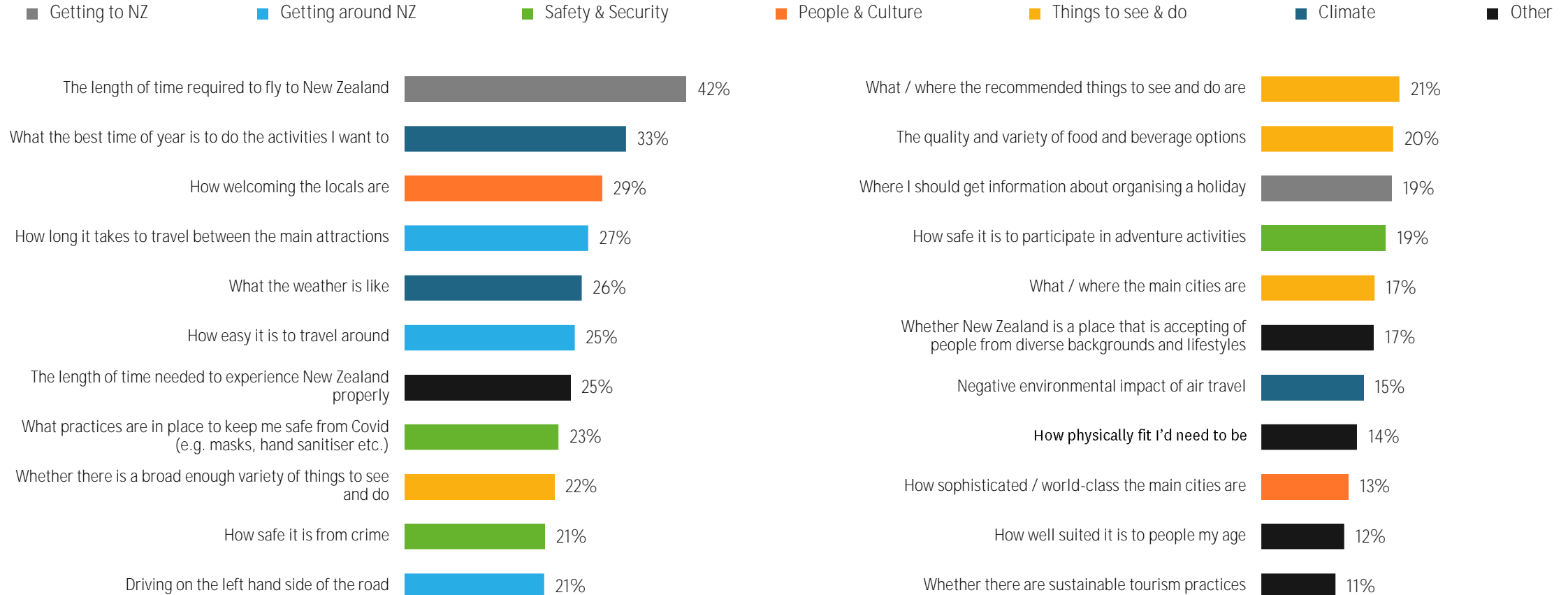


SOURCES/NOTES:

- (1) UK Office for National Statistics, MYE2: Persons by single year of age and sex for local authorities in the UK; Time period: July 2024; Coverage: All persons in the United Kingdom
- (2) Worldometer population clock, UK; Time period as at November 2024
- (3) UK Office for National Statistics, Table 1B: Recent and lapsed internet users and internet non-users, UK; Time period: 2020; Coverage: Persons aged 16 years and over; Internet user definition: Adults who have used the internet within the last 3 month
- (4) Tourism New Zealand, Active Considerer Monitor United Kingdom; Time period: Jul-Nov 2024, under the latest AC definition
- (5) Northern Ireland excluded
- (6) Kantar Analysis

# Knowledge gaps (full list)

AC Monitor | Current 5 Months | Total Active Considerers

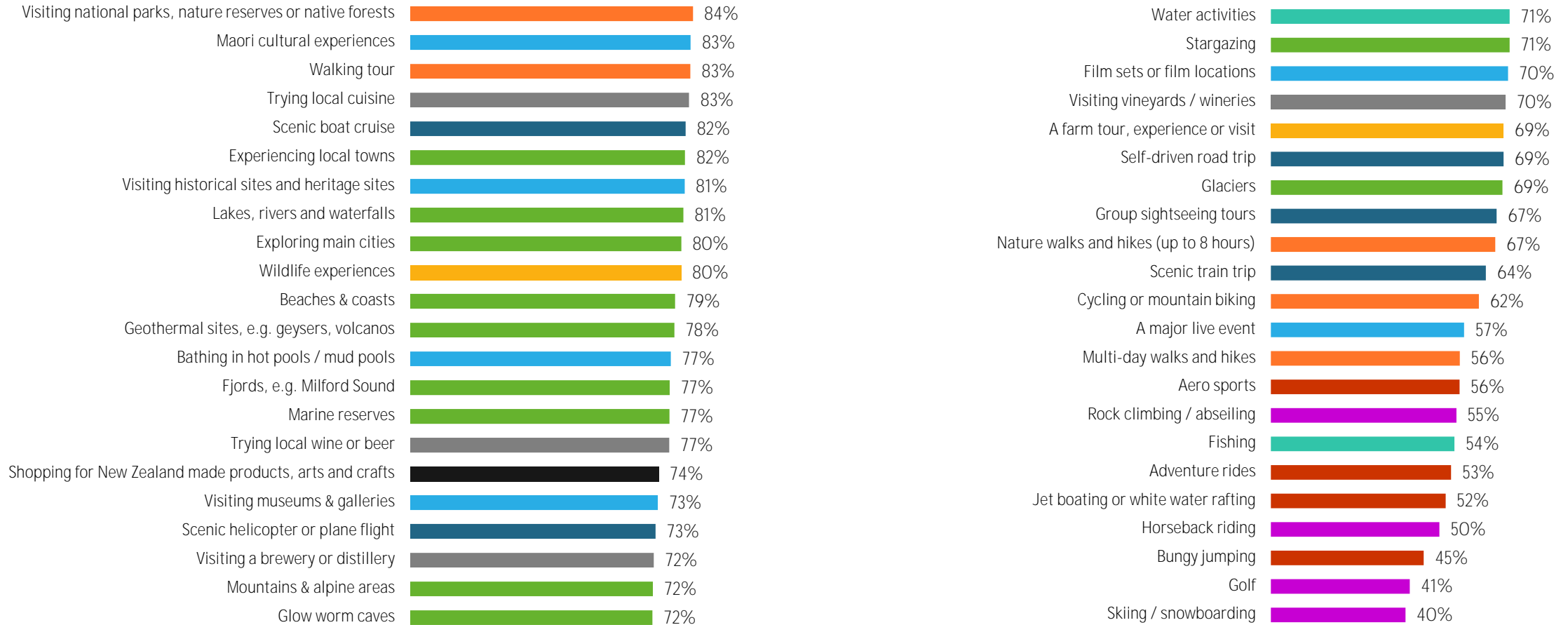


# Activities interested in doing in New Zealand (full list)



AC Monitor | Current 5 Months | Total Active Considerers

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

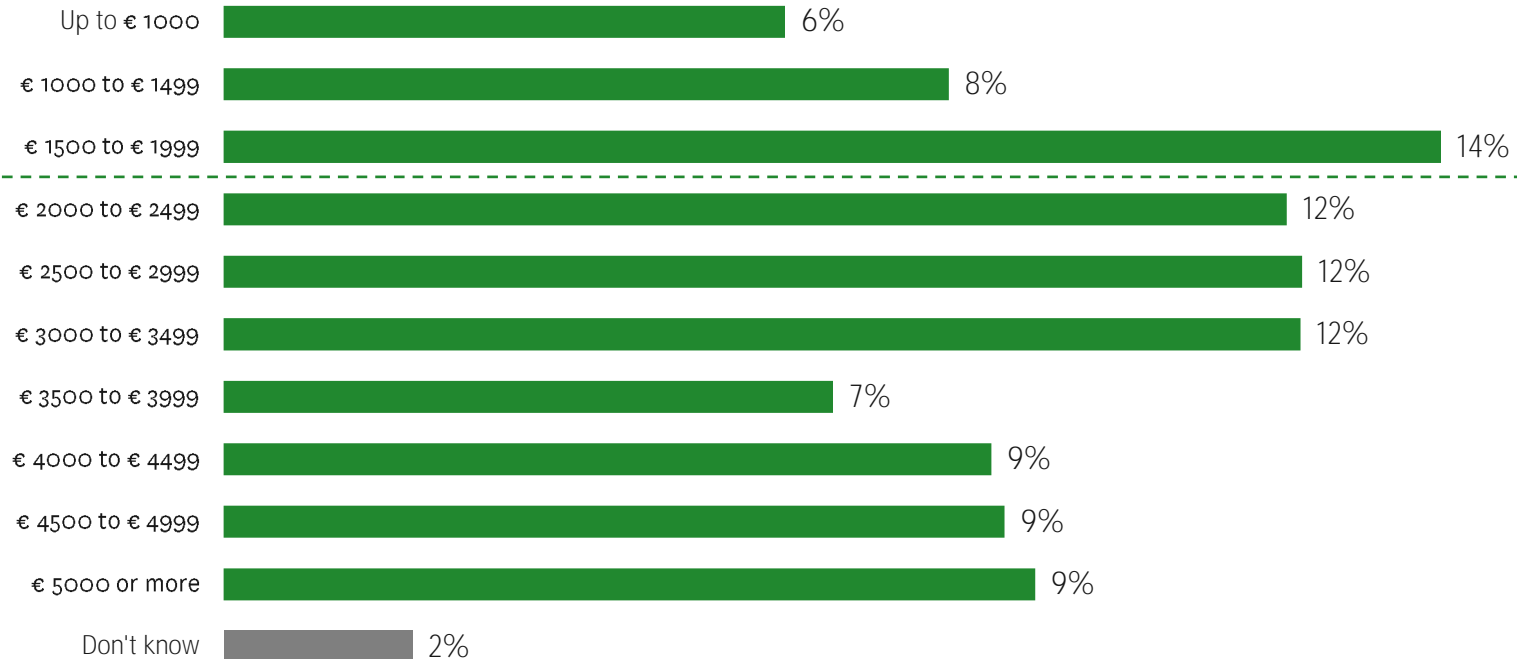


Of those who agree that New Zealand is a preferred destination, 28% do not meet the spend threshold of **€2000**



### Spend on holiday in New Zealand

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



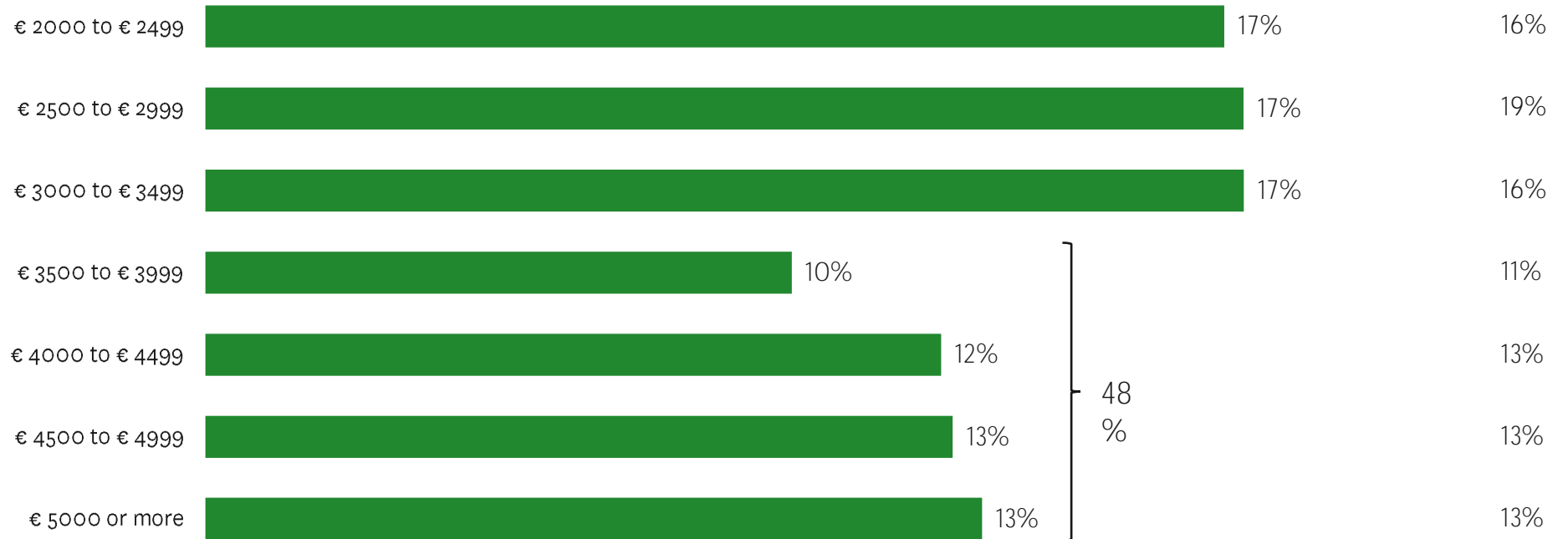
The AC pool is roughly split between those who would spend less than € 3,500 and those who would spend more



### Spend on holiday in New Zealand among ACs

AC Monitor | Current 5 Months | Total Active Considerers

Off-Peak Considerers



▲ ▼ Significantly higher / lower than Peak-Only Considerers

Compared to those who do not find New Zealand appealing, those who do are more likely to be male and living in East Germany

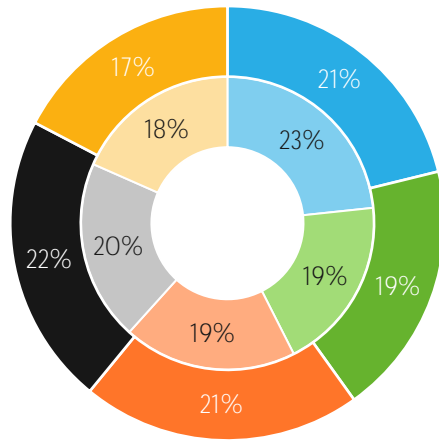


### Profile of those who find New Zealand highly appealing

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

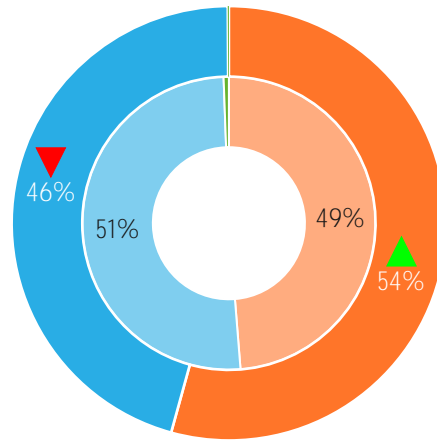
Outer ring: Those who find NZ highly appealing  
Inner ring : Those who do not find New Zealand highly appealing

By age segment



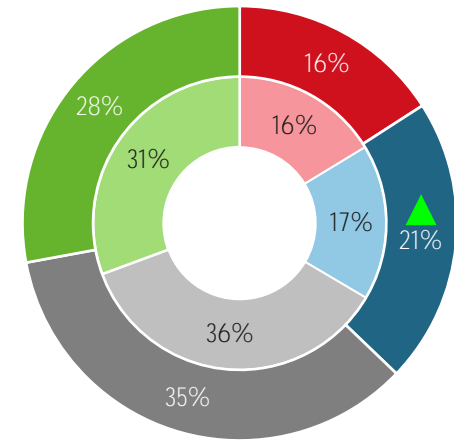
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



- Male
- Female
- Gender diverse

By region



- North
- East
- Central
- South

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



# The demographic profile of those who would consider visiting New Zealand skews towards males and those aged 18 - 39 years

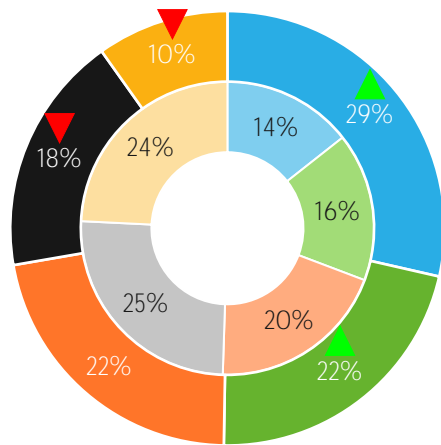


## Profile of those who would seriously consider visiting New Zealand

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

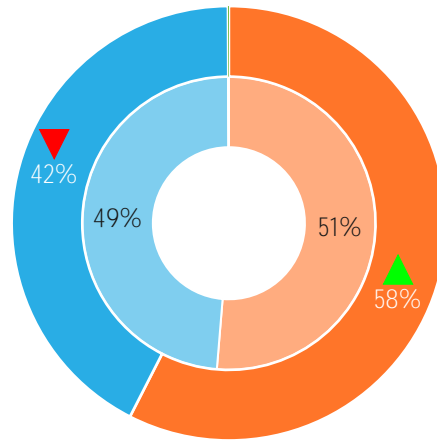
Outer ring: Those who would seriously consider visiting New Zealand  
 Inner ring : Those who would not seriously consider visiting New Zealand

By age segment



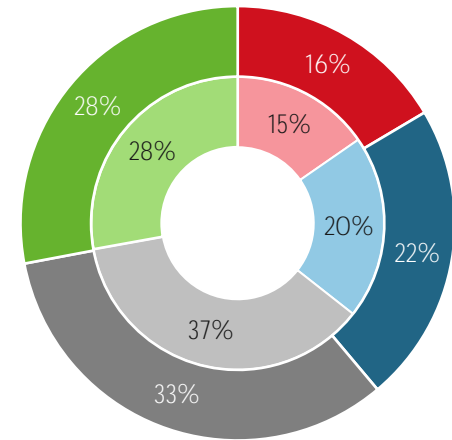
- 18 - 29 years
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- Male
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By region



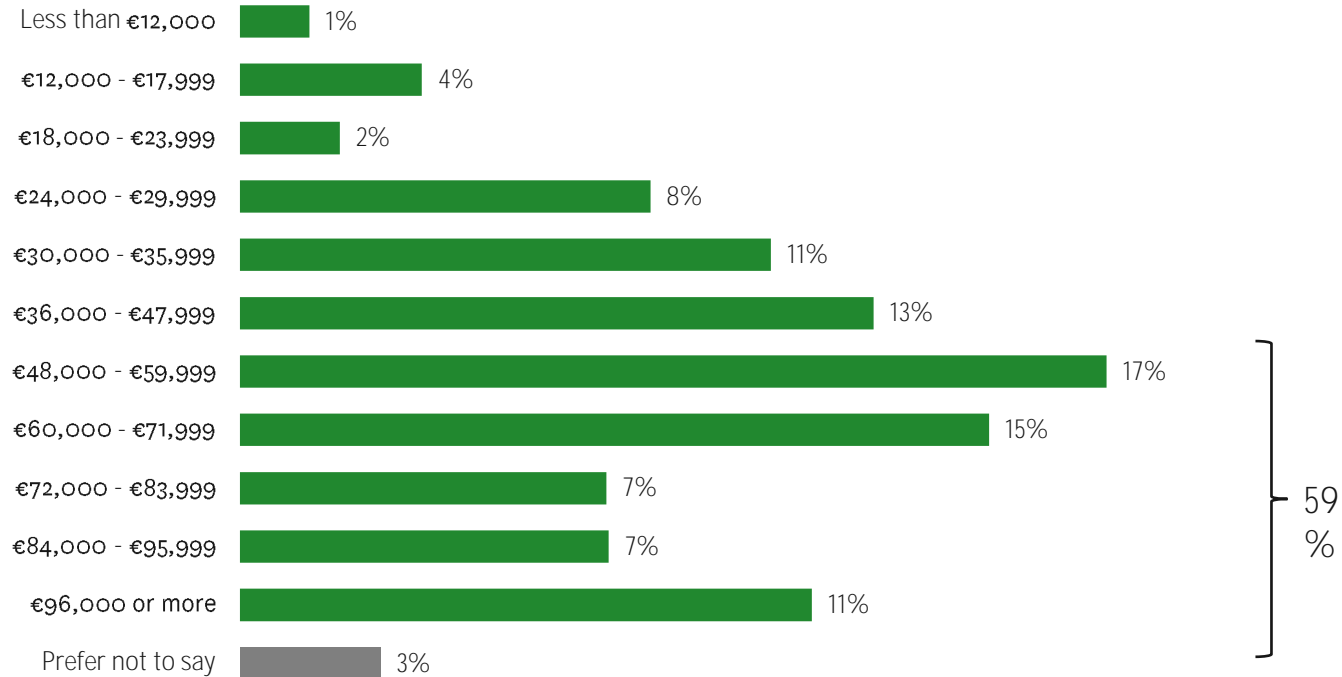
- North
  - East
  - Central
  - South
- ▲ Significantly higher / lower than those who would not seriously consider

# More than half of ACs have an annual household income of over €48,000



## Household Income

AC Monitor | Current 5 Months | Total Active Considerers

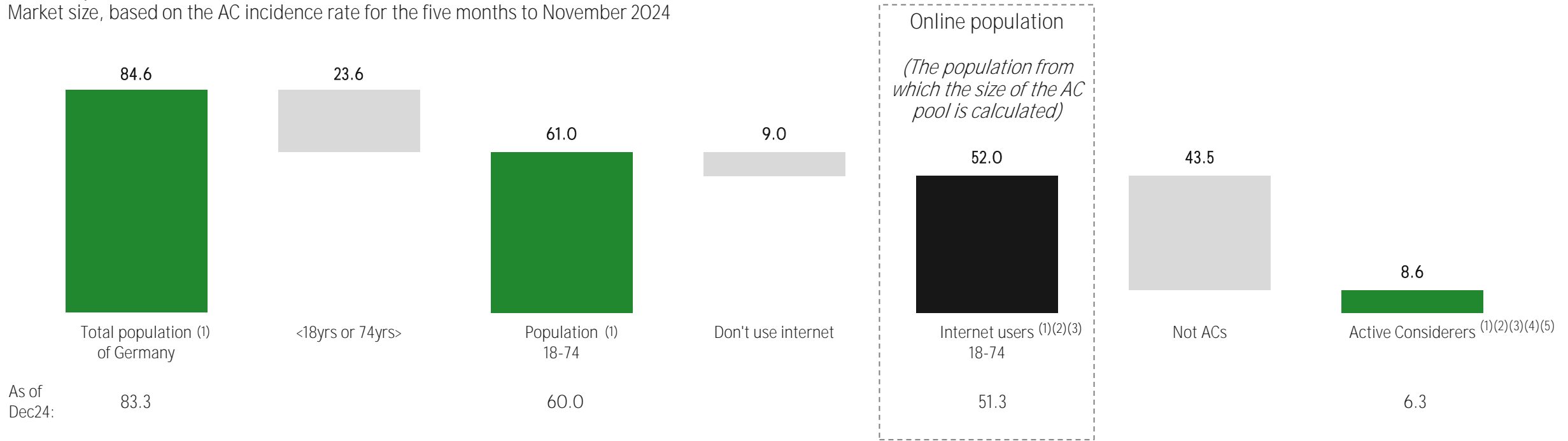


# Out of an online population of approximately 52 million people, 8.6 million are classified as ACs



## Nov 24 | Million people

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



As of Dec24: 83.3

60.0

SOURCES/NOTES:

- (1) Federal Statistical Office, Population: federal states, date, sex, age years, Time period: 31 December 2023; Coverage: Total population
- (2) Worldometer population clock, Germany; Time period as at November 2024
- (3) Kantar Population Profiler, Internet usage by age; Coverage: Germany; Time period: 2024
- (4) Tourism New Zealand, Active Considerer Monitor Germany; Time period: Jul-Nov 2024, under the latest AC definition
- (5) 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	Green	Light Green	Light Green	Light Green	Light Green	Red
The locals are friendly and welcoming	Red	Light Green	Light Green	Light Green	Light Green	Green
Ideal to relax and refresh	Green	Light Green	Light Green	Light Green	Light Green	Light Green
I would feel safe travelling around this destination	Light Green	Light Green	Light Green	Light Green	Light Green	Red
Things to see and do are affordable	Red	Light Green	Light Green	Light Green	Light Green	Green
Affordable to fly to this destination	Red	Light Green	Light Green	Light Green	Light Green	Green

Annotations:

- Horizontal arrow pointing from New Zealand to Thailand in the first row.
- Vertical arrow pointing from New Zealand to Thailand in the second row.
- Text in second row: — We look at how a given number of competitors perform on a given number of attributes to derive an index that measures expected performance
- Text in third row: — 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
- Text in fourth row: — 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 ...

