Active Considerer (AC) Monitor
USA and Canada (H1 FY25)

Report

January 2025

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100% PURE NEW ZEALAND
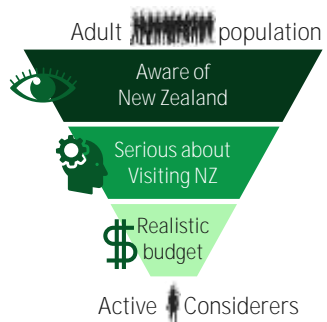newzealand.com

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

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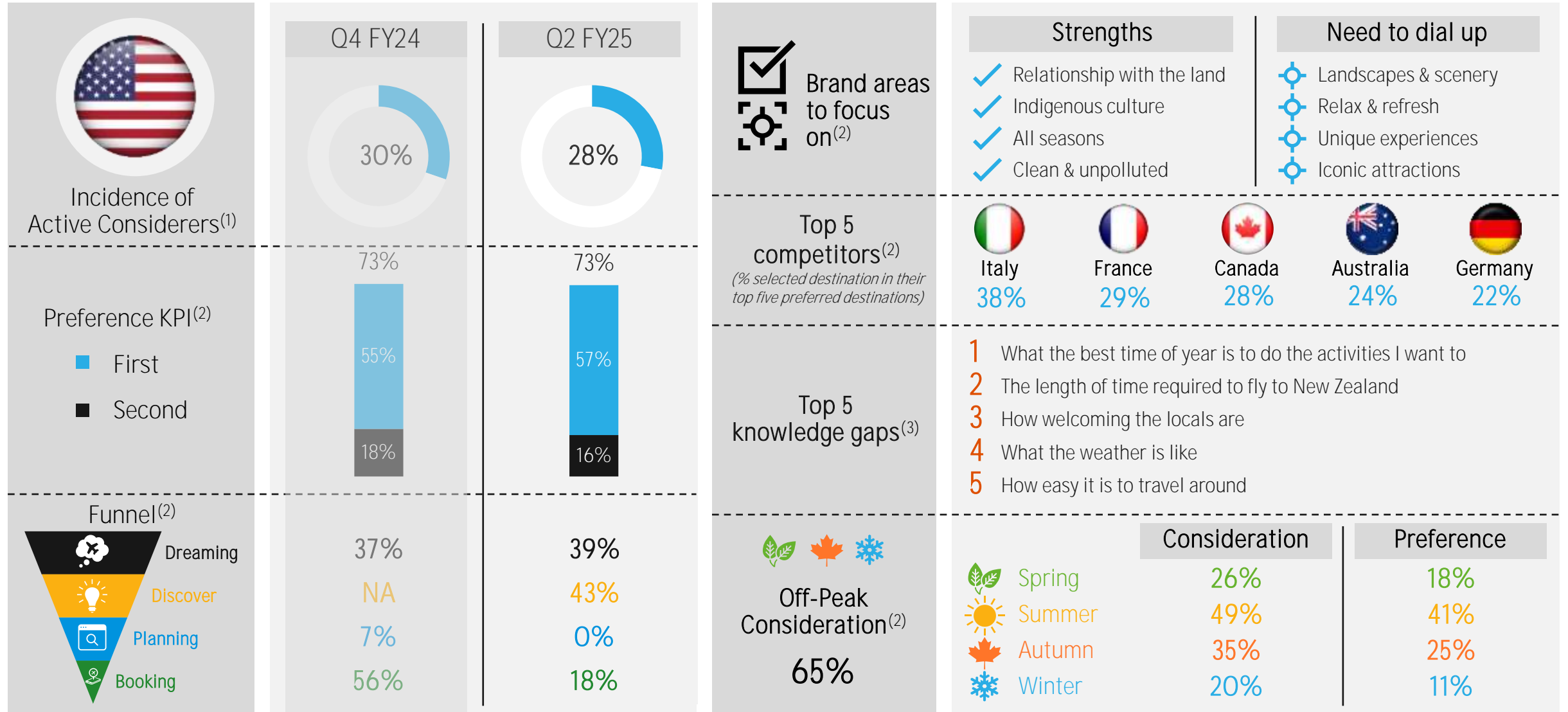Realistic budget
Active Considerers

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

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

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

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

Performance Dashboard

Incidence of Active Considerers[1]

Q4 FY24	Q2 FY25
30%	28%

Preference KPI[2]

- ■ First (blue)
- ■ Second (black)

Q4 FY24	Q2 FY25
73%	73%
55%	57%
18%	16%

Funnel[2]

	Q4 FY24	Q2 FY25
Dreaming	37%	39%
Discover	NA	43%
Planning	7%	0%
Booking	56%	18%

Brand areas to focus on[2]

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

Italy	France	Canada	Australia	Germany
38%	29%	28%	24%	22%

Top 5 knowledge gaps[3]

Off-Peak Consideration[2]

65%

Strengths

- ✓ Relationship with the land
- ✓ Indigenous culture
- ✓ All seasons
- ✓ Clean & unpolluted

Need to dial up

- ◇ Landscapes & scenery
- ◇ Relax & refresh
- ◇ Unique experiences
- ◇ Iconic attractions

1. What the best time of year is to do the activities I want to
2. The length of time required to fly to New Zealand
3. How welcoming the locals are
4. What the weather is like
5. How easy it is to travel around

	Consideration	Preference
Spring	26%	18%
Summer	49%	41%
Autumn	35%	25%
Winter	20%	11%

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Significantly higher / lower than previous period

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Performance Dashboard

	Apr-24	Oct-24
Incidence of Active Considerers	29%	28%
Preference KPI	57%	57%
First	35%	35%
Second	22%	22%
Dreaming	47%	48%
Discover	N/A	42%
Planning	16%	1%
Booking	37%	9%
Consider off-peak travel to New Zealand	60%	63%

Key brand weakness / strengths to focus on

Strengths
- ✓ Landscapes & scenery
- ✓ Friendly people
- ✓ Relationship with the land
- ✓ Clean & unpolluted

Dial up
- ✦ All seasons
- ✦ Iconic attractions
- ✦ Quality food & wine
- ✦ Fun & enjoyment

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

Australia	Italy	Japan	France	Hawaii
37%	30%	27%	27%	25%

Top 5 knowledge gaps

1. The length of time required to fly to New Zealand
2. What the best time of year is to do the activities I want to
3. How safe it is from crime
4. How easy it is to travel around
5. What the weather is like

Significantly higher / lower than previous wave at 95%

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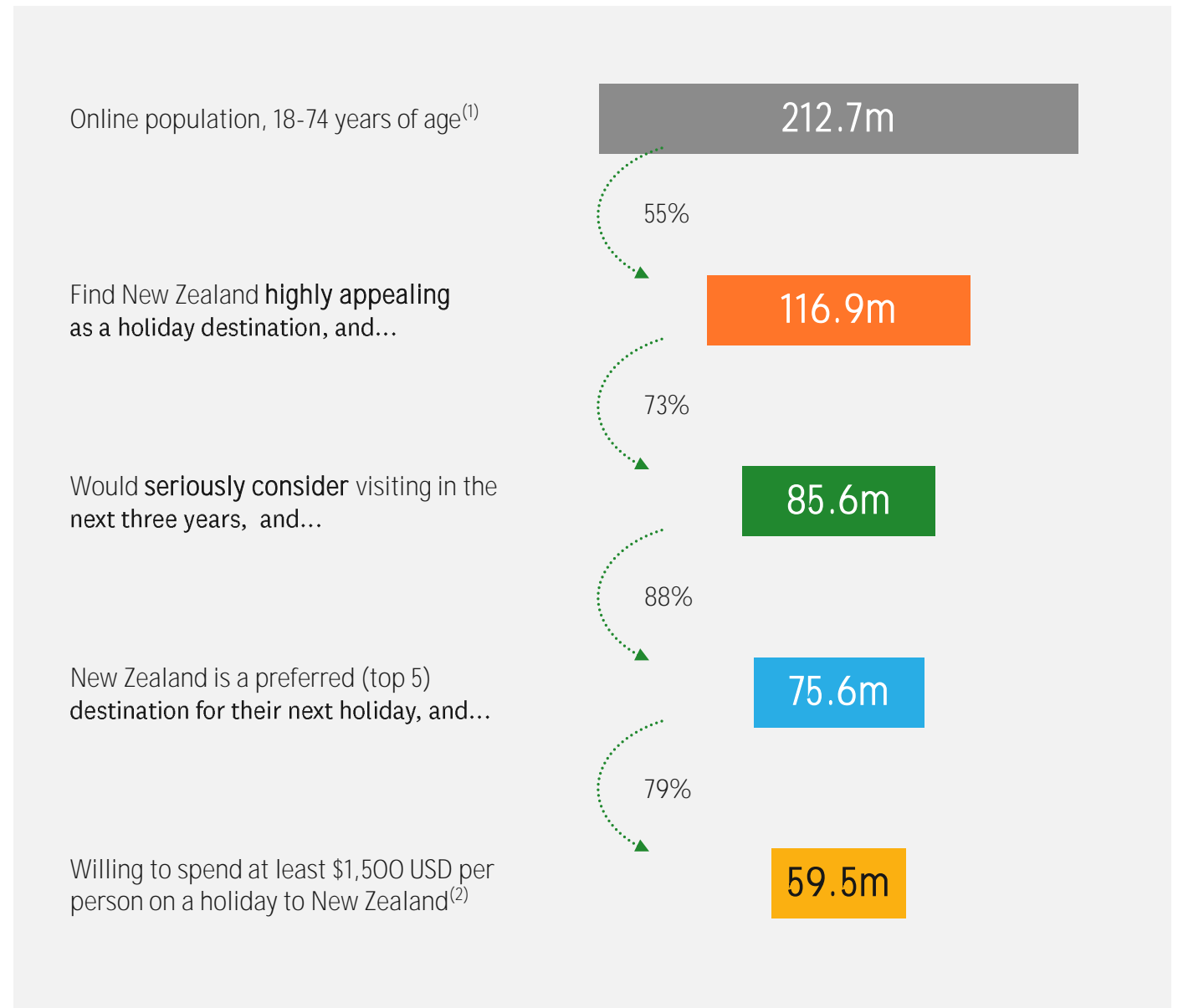
THE UNITED STATES OF AMERICA

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1

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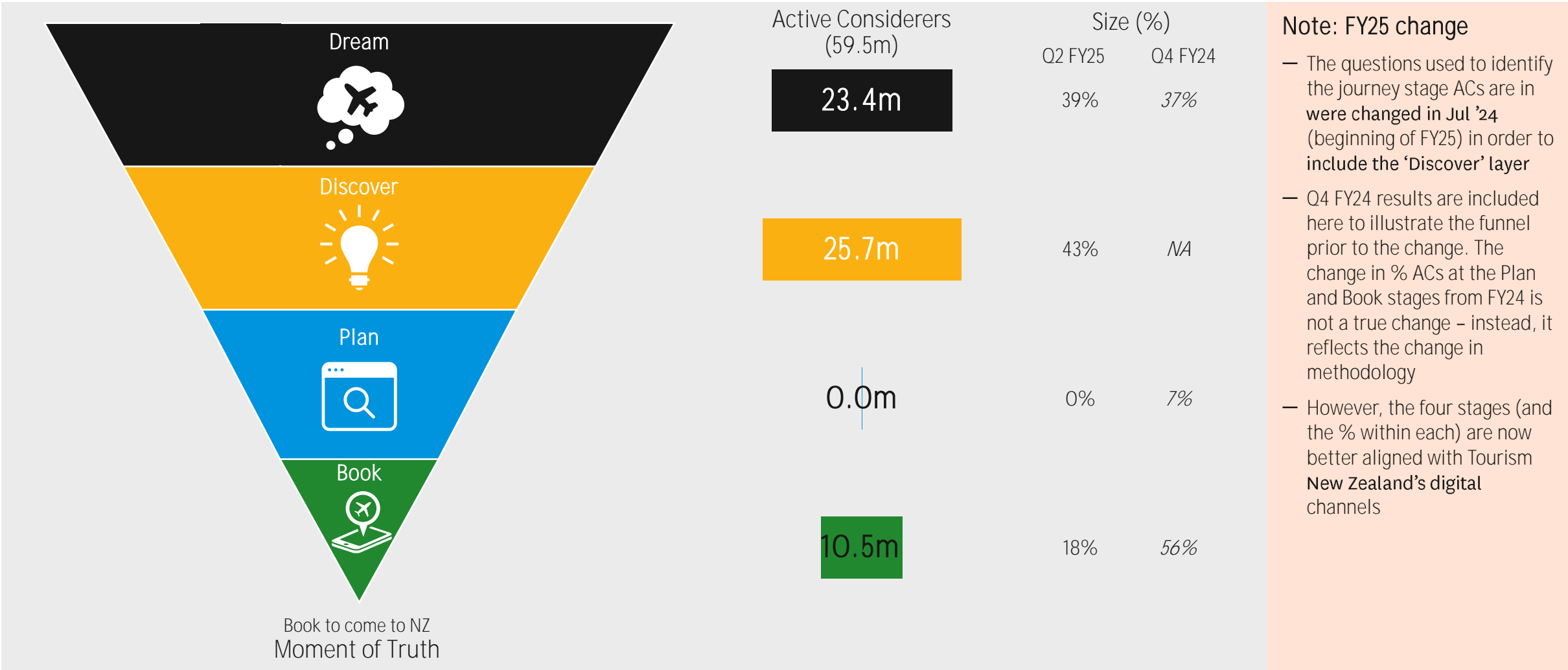
Active Considerer Funnel – USA

Active Considerers definition

Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation, and have a realistic budget for their visit (at least $1,500 USD per person) to New Zealand

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

212.7m

55%

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

116.9m

73%

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

85.6m

88%

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

75.6m

79%

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

59.5m

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Journey funnel to New Zealand – USA

	Active Considerers (59.5m)	Size (%)	
		Q2 FY25	Q4 FY24
Dream	23.4m	39%	*37%*
Discover	25.7m	43%	*NA*
Plan	0.0m	0%	*7%*
Book	10.5m	18%	*56%*

Book to come to NZ
Moment of Truth

Note: FY25 change

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

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

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

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

Overall, the AC incidence in USA is relatively stable at 28%, equating to 59.5 million people

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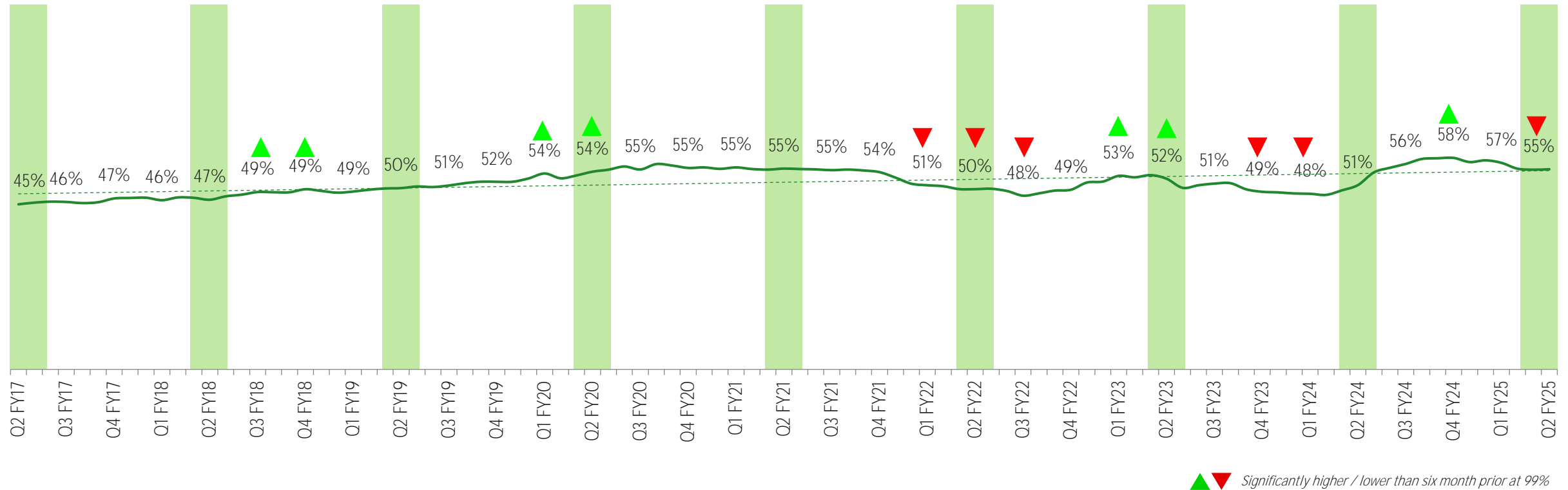AC Monitor | Current 5M | % Online users aged 18-74

100%	45%	55% ▼	15%	40% ▼	5%	36% ▼	8%	28%

Online Americans aged 18-74 — NZ is highly appealing — Would definitely consider NZ — NZ is a preferred destination to visit — Would spend at least $1,500 USD on a trip

ACs – We only survey these people in more detail

This 28% equates to approx. 59.5m people

Previous 6M

| 100% | 42% | 58% | 14% | 44% | 5% | 38% | 8% | 30% |

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

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 = 3994 | Q4 FY24 n = 4481

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Appeal of New Zealand has declined in Q2 FY25, but is above the level from a year ago

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

Q2 FY17	Q3 FY17	Q4 FY17	Q1 FY18	Q2 FY18	Q3 FY18	Q4 FY18	Q1 FY19	Q2 FY19	Q3 FY19	Q4 FY19	Q1 FY20	Q2 FY20	Q3 FY20	Q4 FY20	Q1 FY21	Q2 FY21	Q3 FY21	Q4 FY21	Q1 FY22	Q2 FY22	Q3 FY22	Q4 FY22	Q1 FY23	Q2 FY23	Q3 FY23	Q4 FY23	Q1 FY24	Q2 FY24	Q3 FY24	Q4 FY24	Q1 FY25	Q2 FY25
45%	46%	47%	46%	47%	49%	49%	49%	50%	51%	52%	54%	54%	55%	55%	55%	55%	55%	54%	51%	50%	48%	49%	53%	52%	51%	49%	48%	51%	56%	58%	57%	55%

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

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The AC incidence has been growing over the last year, settling at 28% - considerably above levels from a year ago

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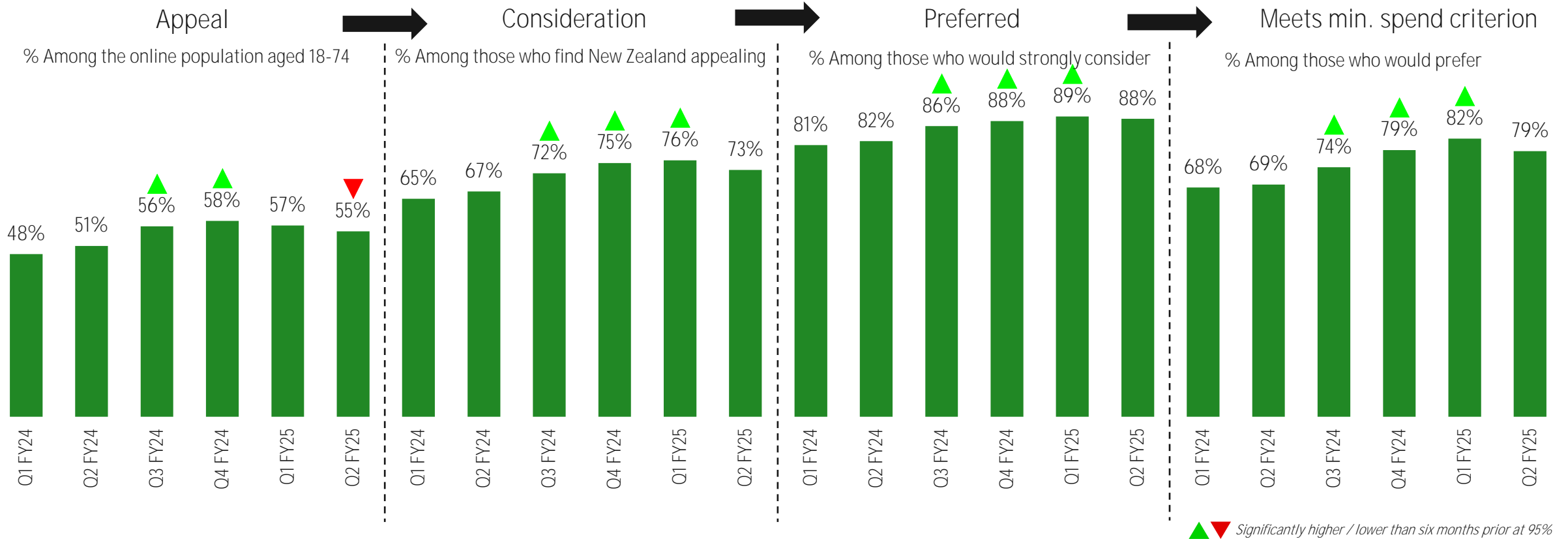AC Monitor | 6MRA | Target online population aged 18-74

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

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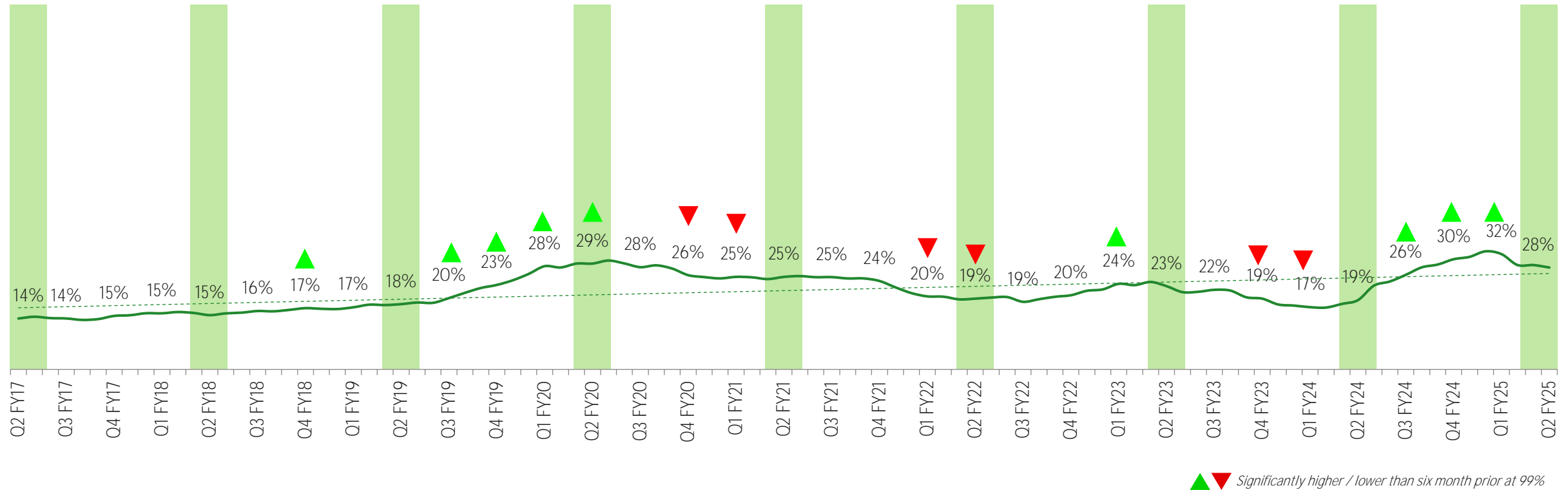
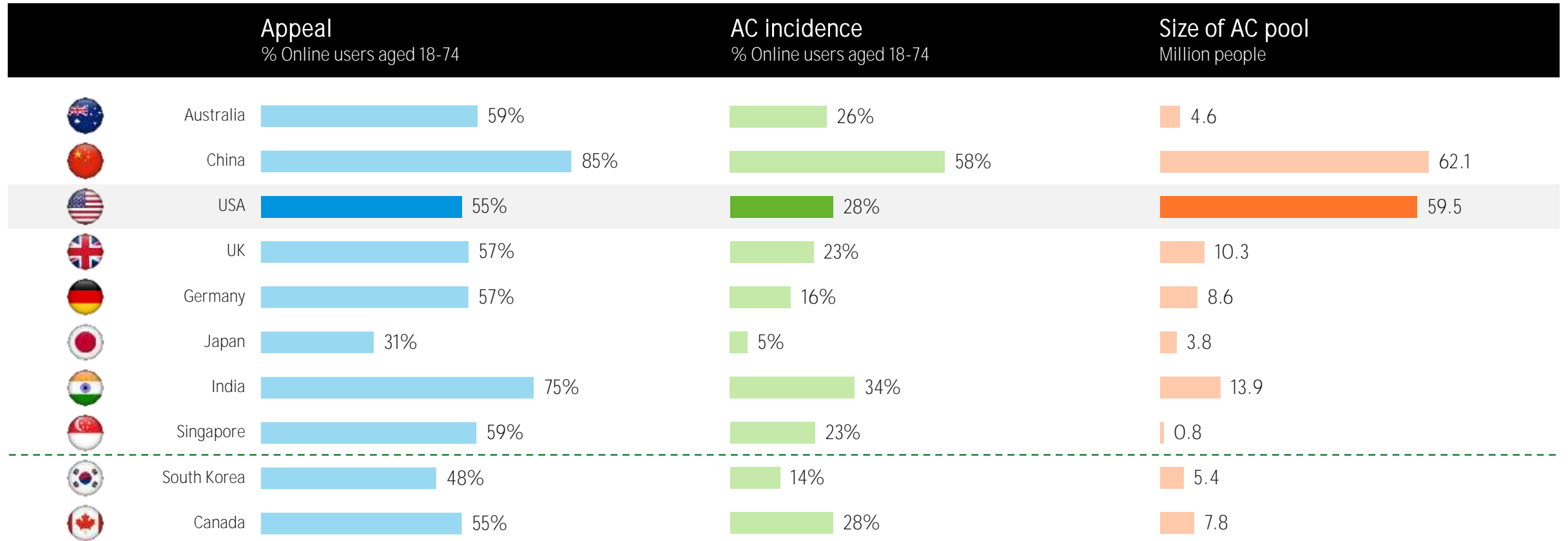# Despite a recent dip in appeal, conversion through the AC funnel has improved in the last year and remains strong

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

| Appeal | → | Consideration | → | Preferred | → | Meets min. spend criterion |

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

Appeal
- Q1 FY24: 48%
- Q2 FY24: 51%
- Q3 FY24: 56% ▲
- Q4 FY24: 58% ▲
- Q1 FY25: 57%
- Q2 FY25: 55% ▼

Consideration
- Q1 FY24: 65%
- Q2 FY24: 67%
- Q3 FY24: 72% ▲
- Q4 FY24: 75% ▲
- Q1 FY25: 76% ▲
- Q2 FY25: 73%

Preferred
- Q1 FY24: 81%
- Q2 FY24: 82%
- Q3 FY24: 86% ▲
- Q4 FY24: 88% ▲
- Q1 FY25: 89% ▲
- Q2 FY25: 88%

Meets min. spend criterion
- Q1 FY24: 68%
- Q2 FY24: 69%
- Q3 FY24: 74% ▲
- Q4 FY24: 79% ▲
- Q1 FY25: 82% ▲
- Q2 FY25: 79%

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

1. Sample size: Q1 FY24 – Q2 FY25 (6MRA): Appeal n = 7999, 7194, 4888, 4481, 4357, 3994 | Consider n = 3482, 3242, 2458, 2295, 2148, 1914 | Prefer n = 1988, 1898, 1572, 1492, 1435, 1266 | Spend n = 1490, 1443, 1288, 1228, 1198, 1056
2. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"
3. Question "Would you consider visiting New Zealand for a holiday within the next three years?"
4. Question "To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"
5. Question "On a per person basis, how much would you be willing to spend on a holiday to New Zealand?"

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With 59.5 million ACs, USA represents a major opportunity for TNZ to drive arrivals

	Appeal % Online users aged 18-74	AC incidence % Online users aged 18-74	Size of AC pool Million people
Australia	59%	26%	4.6
China	85%	58%	62.1
USA	55%	28%	59.5
UK	57%	23%	10.3
Germany	57%	16%	8.6
Japan	31%	5%	3.8
India	75%	34%	13.9
Singapore	59%	23%	0.8
South Korea	48%	14%	5.4
Canada	55%	28%	7.8

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Compared to non-ACs, ACs are more likely to be aged 18-39 years, male and reside in the West and North East; 57% are families with pre-school or school aged children

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

Outer ring: US Active Considerers
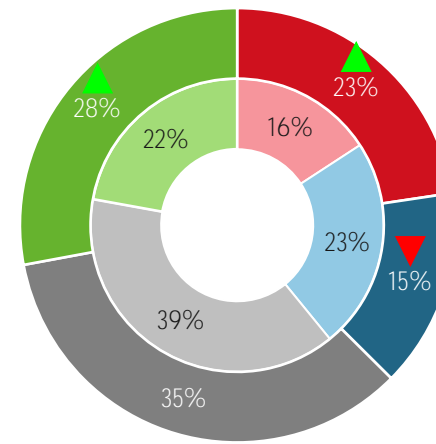Inner ring : US non-Active Considerers
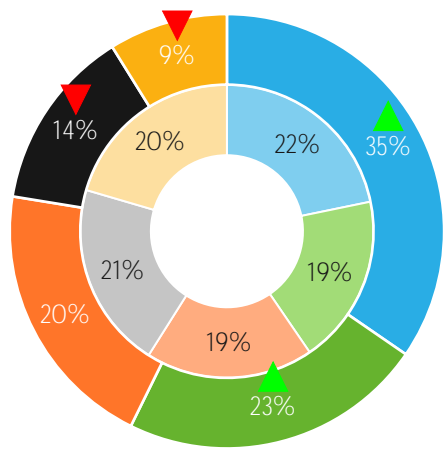
By age segment

35%
22%
19%
9%
14%
20%
21%
20%
19%
23%

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

By gender

45%
54%
35%
65%

- Male
- Female
- Gender diverse

By region

23%
16%
28%
22%
39%
35%
23%
15%
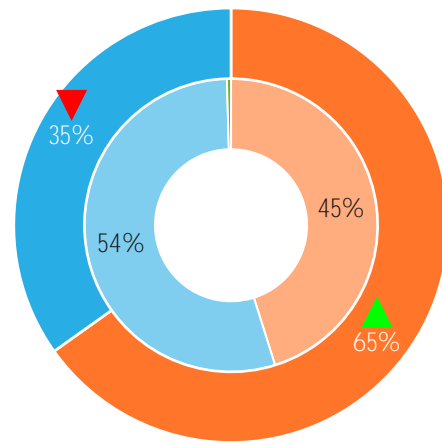
- Northeast
- Midwest
- South
- West

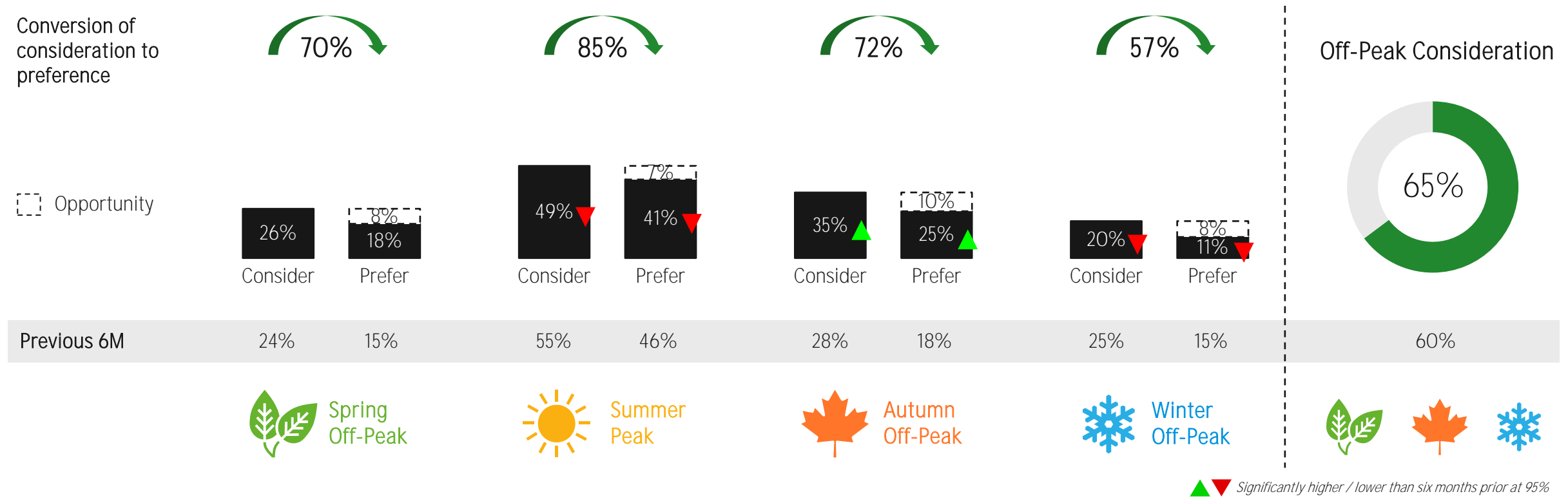### Household Composition

11%
3%
11%
13%
5%
32%
25%
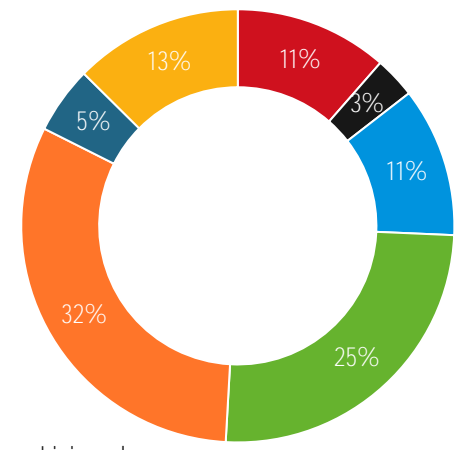
- Living alone
- Living with friends / flat mates
- Couple – no children
- Family with mainly pre-school children
- Family with mainly school-age children
- Family with mainly independent children
- Living at home with my parents

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

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Off-peak consideration is indicatively higher than 6 months ago, driven by a recent shift in interest towards autumn

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

Conversion of consideration to preference

Opportunity

	70%		85%		72%		57%		Off-Peak Consideration

	Consider	Prefer	Consider	Prefer	Consider	Prefer	Consider	Prefer	
	26%	8% / 18%	49% ▼	7% / 41% ▼	35% ▲	10% / 25% ▲	20% ▼	8% / 11% ▼	65%
Previous 6M	24%	15%	55%	46%	28%	18%	25%	15%	60%

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

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

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Consideration for off-peak seasons as a whole has been steadily trending upwards over the last 6 months, largely driven by autumn; conversely, consideration for summer is moving downwards

Seasonal consideration
AC Monitor | 6MRA | Total Active Considerers

Metrics are not statistically different from a year ago (Q2 FY24)

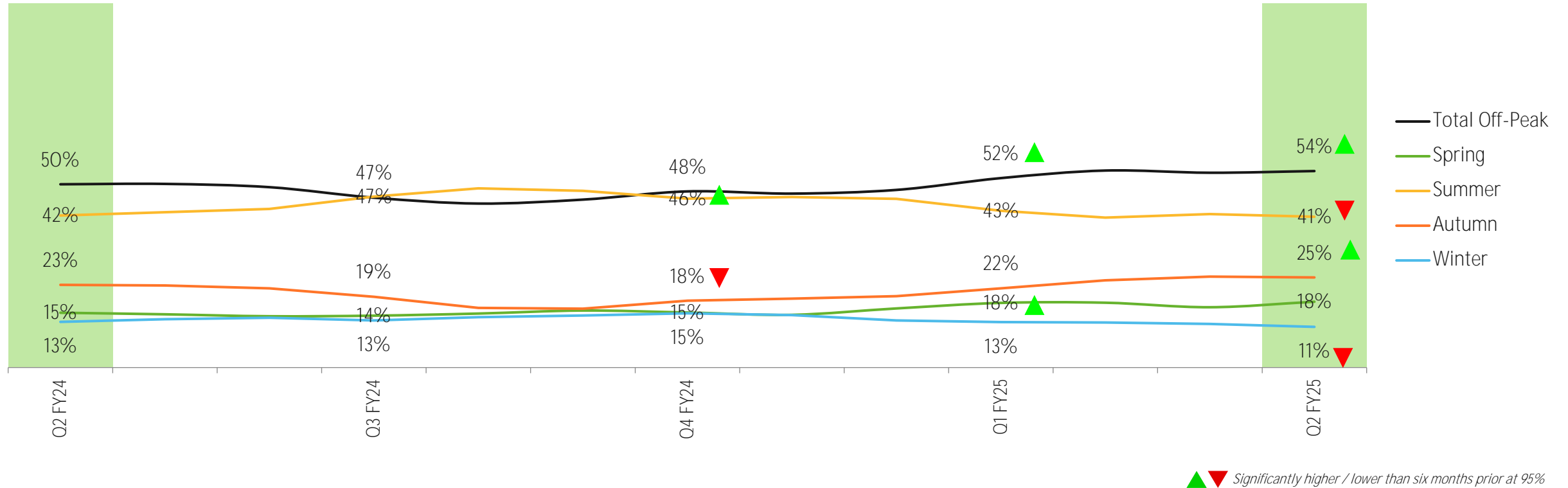▲▼ *Significantly higher / lower than six months prior at 95%*
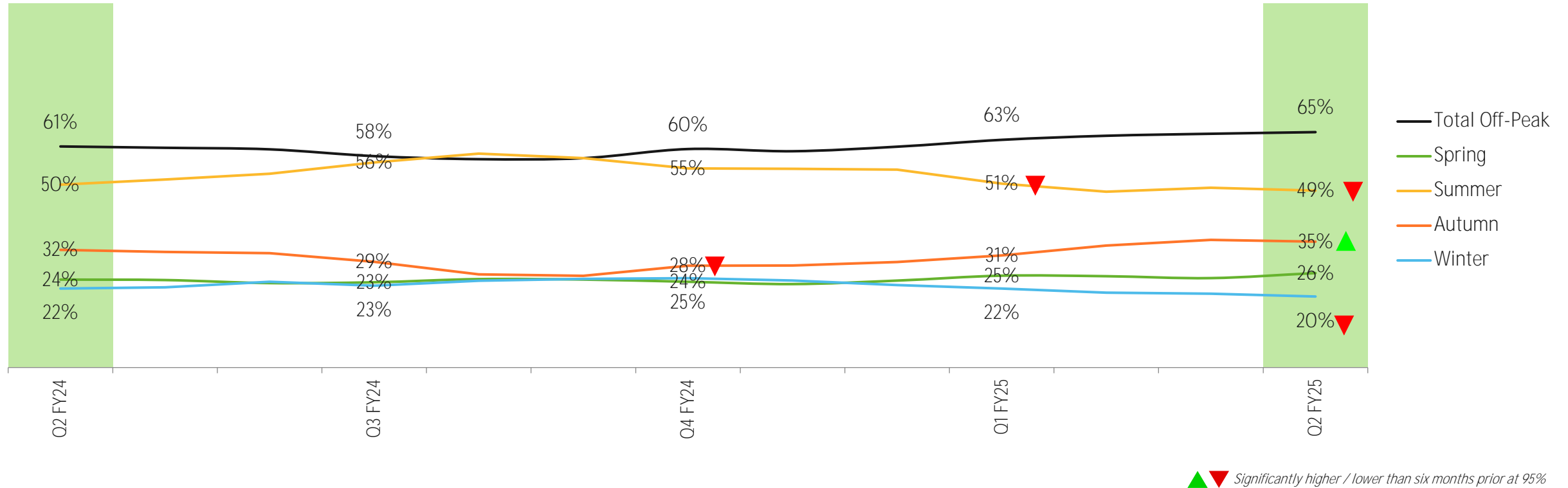
Preference for off-peak travel has increased over the past two quarters, due to recent increases in preference for both spring and autumn

Seasonal Preference
AC Monitor | 6MRA | Total Active Considerers

Metrics are not statistically different from a year ago (Q2 FY24)

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

	Q2 FY24	Q3 FY24	Q4 FY24	Q1 FY25	Q2 FY25
Total Off-Peak	50%	47%	48% / 46%	52% ▲	54% ▲
Summer	42%	47%		43%	41% ▼
Autumn	23%	19%	18% ▼	22%	25% ▲
Spring	15%	14%	15%	18% ▲	18%
Winter	13%	13%	15%	13%	11% ▼

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

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Autumn considerers skew towards higher income households, families with dependent children and those from Southern USA while spring considerers skew towards females

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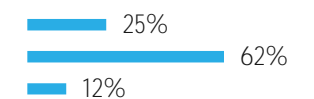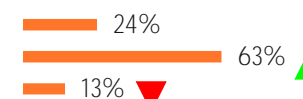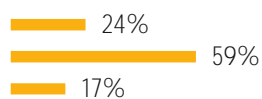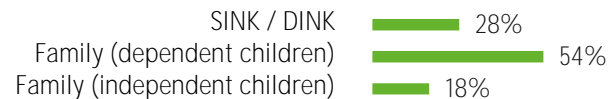Total Active Considerers

	Spring Off-Peak	Summer Peak	Autumn Off-Peak	Winter Off-Peak
Male	58% ▼	66%	67%	67%
Female	42% ▲	34%	33%	33%
Gender diverse	0%	0%	0%	0%
18 to 29 yrs	34%	34%	31%	26% ▼
30 to 39 yrs	18%	25%	21%	28%
40 to 49 yrs	25%	21%	23%	24%
50 to 59 yrs	11%	12%	18% ▲	14%
60 to 74 yrs	12%	7%	6% ▼	7%
Northeast	23%	25%	21%	27%
Midwest	15%	16%	12%	18%
South	34%	31% ▼	43% ▲	32%
West	28%	28%	24%	24%
Less than USD $60,000	28%	28%	19% ▼	18% ▼
USD $60,000 – $99,999	38%	36%	47% ▲	42%
USD $100,000 or more	34%	35%	33%	40% ▲
Prefer not to say	0%	1%	1%	0%
SINK / DINK	28%	24%	24%	25%
Family (dependent children)	54%	59%	63% ▲	62%
Family (independent children)	18%	17%	13% ▼	12%

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1. Sample size: Spring n = 207 | Summer n = 351 | Autumn n = 255 | Winter n = 140

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

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The demographic profile of off-peak considerers skews towards those aged 40-49, higher income households, families with dependent children, and those from Southern USA

Profile of off-peak considerers
AC Monitor | Current 5M | off-peak considerers

Off-peak considerers

Peak-only considerers

Gender

	Off-peak considerers	Peak-only considerers
Male	64%	67%
Female	36%	33%
Gender diverse	0%	0%

Age

	Off-peak considerers	Peak-only considerers
18 to 29 yrs	33%	37%
30 to 39 yrs	22%	24%
40 to 49 yrs	23% ▲	16%
50 to 59 yrs	15%	12%
60 to 74 yrs	8%	11%

Region

	Off-peak considerers	Peak-only considerers
Northeast	22%	24%
Midwest	14%	15%
South	37% ▲	30%
West	26%	31%

Income

	Off-peak considerers	Peak-only considerers
Less than USD $60,000	22% ▼	34%
USD $60,000 – $99,999	43% ▲	34%
USD $100,000 or more	34%	31%
Prefer not to say	1%	1%

Household

	Off-peak considerers	Peak-only considerers
SINK / DINK	25%	28%
Family (dependent children)	60% ▲	51%
Family (independent children)	16%	21%

At 65% off-peak consideration, the opportunity to drive off-peak arrivals among USA ACs is sizeable, with autumn providing the primary opportunity

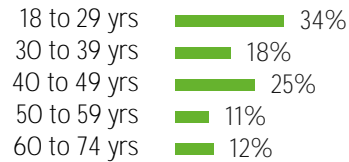| Seasonal Consideration	Total Off-Peak % ACs	Spring Off-Peak	Summer Peak	Autumn Off-Peak	Winter Off-Peak
Australia	65%	32%	47%	32%	24%
China	84%	34%	30%	44%	31%
USA	65%	26%	49%	35%	20%
UK	57%	21%	48%	26%	19%
Germany	62%	31%	45%	24%	18%
Japan	68%	32%	42%	35%	18%
India	75%	31%	45%	36%	29%
Singapore	78%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

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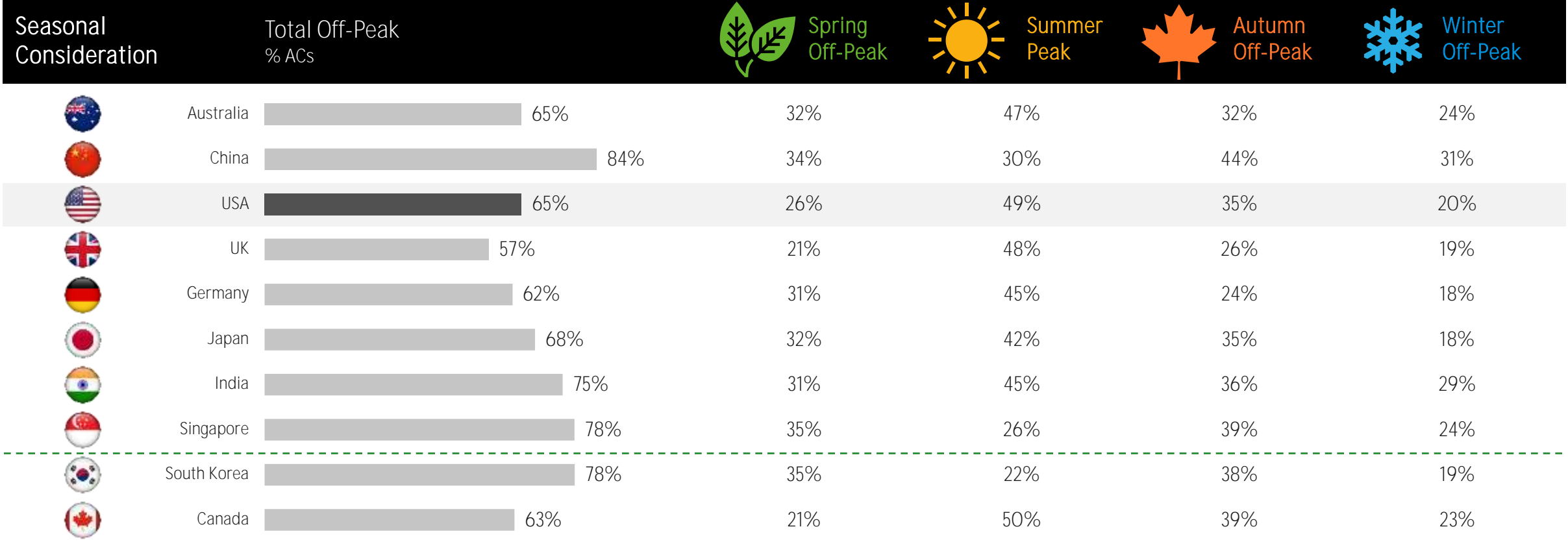
2

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

Marketing messages should continue to reinforce stunning landscapes and opportunities to feel refreshed and have fun which remain key motivators to visit; additionally, messaging promoting local cuisine, opportunities for pampering and personal growth can be dialed up

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

Previous 6 months

Reason	Current	Previous 6 months
To experience beautiful landscapes/scenery	41%	40%
To feel relaxed and refreshed	38%	36%
To enjoy local food and beverages	36% ▲	27%
To have fun & enjoy myself	35%	39%
To learn & explore new things	34%	38%
To get in touch with nature	32%	29%
To take a break from the routine, stresses and pressures of everyday life	29%	36%
To interact with people of a different culture or lifestyle	29%	31%
To feel a sense of adventure	28%	31%
To indulge & pamper myself	28% ▲	20%
To create lasting memories through photography	26%	31%
To embrace challenges and personal growth	24% ▲	17%
To connect and spend time with important people in my life	22%	21%
To visit a place that has inspired me through film / TV	21%	25%
To show my children a different way of life	20%	21%
For a specific event (e.g. sport event, family wedding etc.)	14%	14%

▲▼ *Significantly higher / lower than previous period*

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

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Compared to peak-only considerers, off-peak considerers are more motivated by the need to take a break, embrace personal growth, take photos and show children a different way of life – as such, consider tailoring messaging

Reasons to visit New Zealand for a holiday
AC Monitor | Current 5M | off-peak considerers

Peak-only considerers

Reason	off-peak	Peak-only
To experience beautiful landscapes/scenery	42%	39%
To enjoy local food and beverages	39%	32%
To feel relaxed and refreshed	36%	41%
To learn & explore new things	35%	30%
To take a break from the routine, stresses and pressures of everyday life	34% ▲	20%
To have fun & enjoy myself	33%	39%
To get in touch with nature	32%	32%
To create lasting memories through photography	31% ▲	17%
To embrace challenges and personal growth	30% ▲	14%
To interact with people of a different culture or lifestyle	28%	29%
To feel a sense of adventure	28%	28%
To indulge & pamper myself	25%	34%
To connect and spend time with important people in my life	25%	17%
To show my children a different way of life	24% ▲	13%
To visit a place that has inspired me through film / TV	20%	22%
For a specific event (e.g. sport event, family wedding etc.)	16%	12%

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

Sample size: off-peak considerers n = 198 | Peak-Only Considerers n = 102
Question "Why do you want to visit New Zealand for a holiday?"

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New Zealand's key competitors are in Europe and America, with Italy remaining number one competitor, followed by France and Canada

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

Canada
28%
(27%)

UK
20%
(23%)

Ireland
20%
(15%)

Germany
22%
(21%)

Japan
21%
(20%)

France
29%
(29%)

Italy
38%
(40%)

Hawaii
22%
(26%)

Caribbean
17%
(15%)

Australia
24%
(27%)
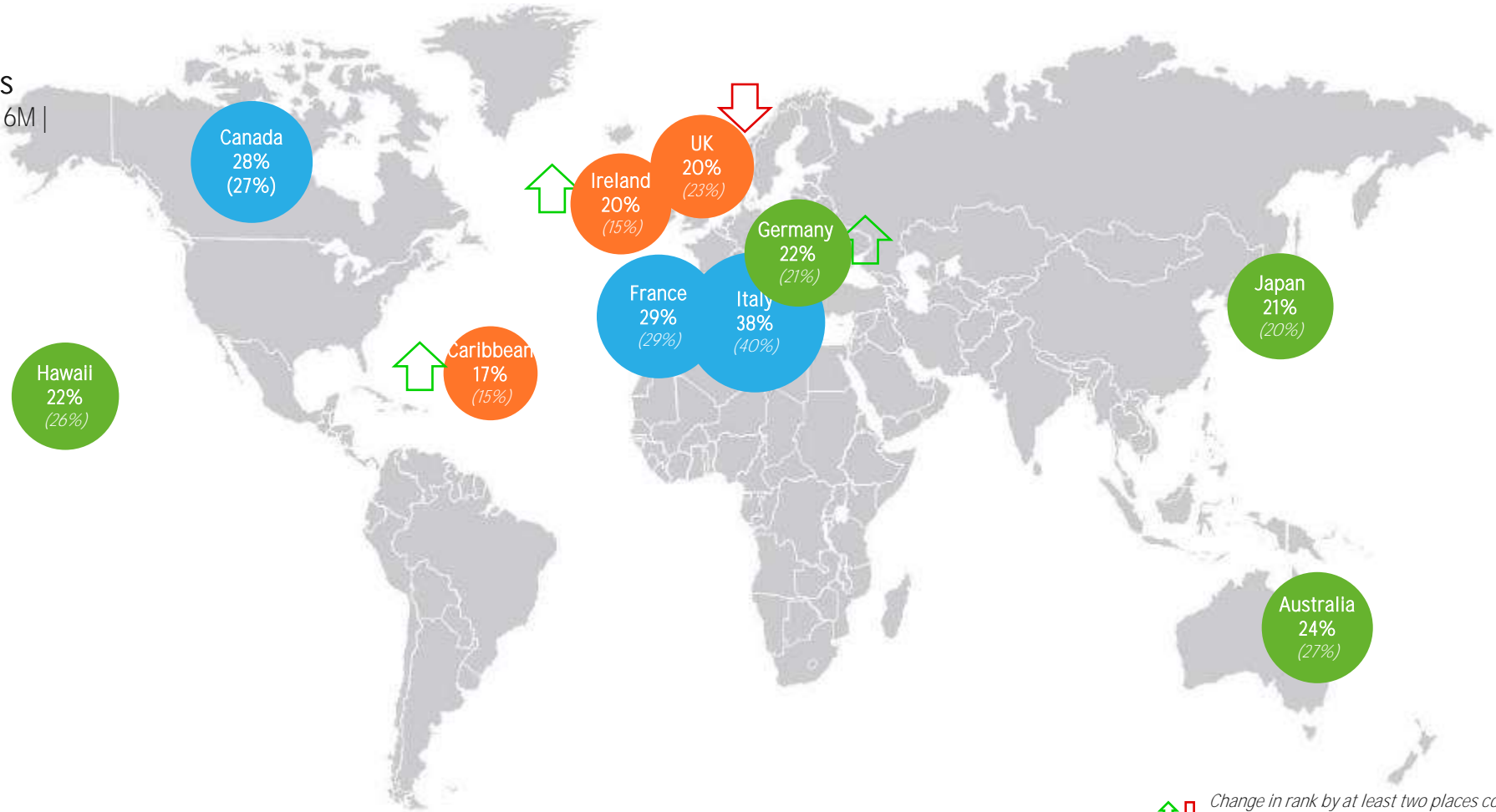
Switzerland and UAE have dropped out of the Top 10 ranking

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 = 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?"

KANTAR

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The top 10 competitors for off-peak considerers largely align with those for total ACs, except for the Caribbean, which did not make the top 10, and Switzerland, which did

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

Canada
29%
(27%)

UK
21%
(22%)

Ireland
19%
(16%)

Germany
19%
(22%)

Switzerland
18%
(20%)

France
29%
(28%)

Italy
38%
(41%)

Japan
22%
(21%)

Hawaii
21%
(27%)

Australia
25%
(29%)
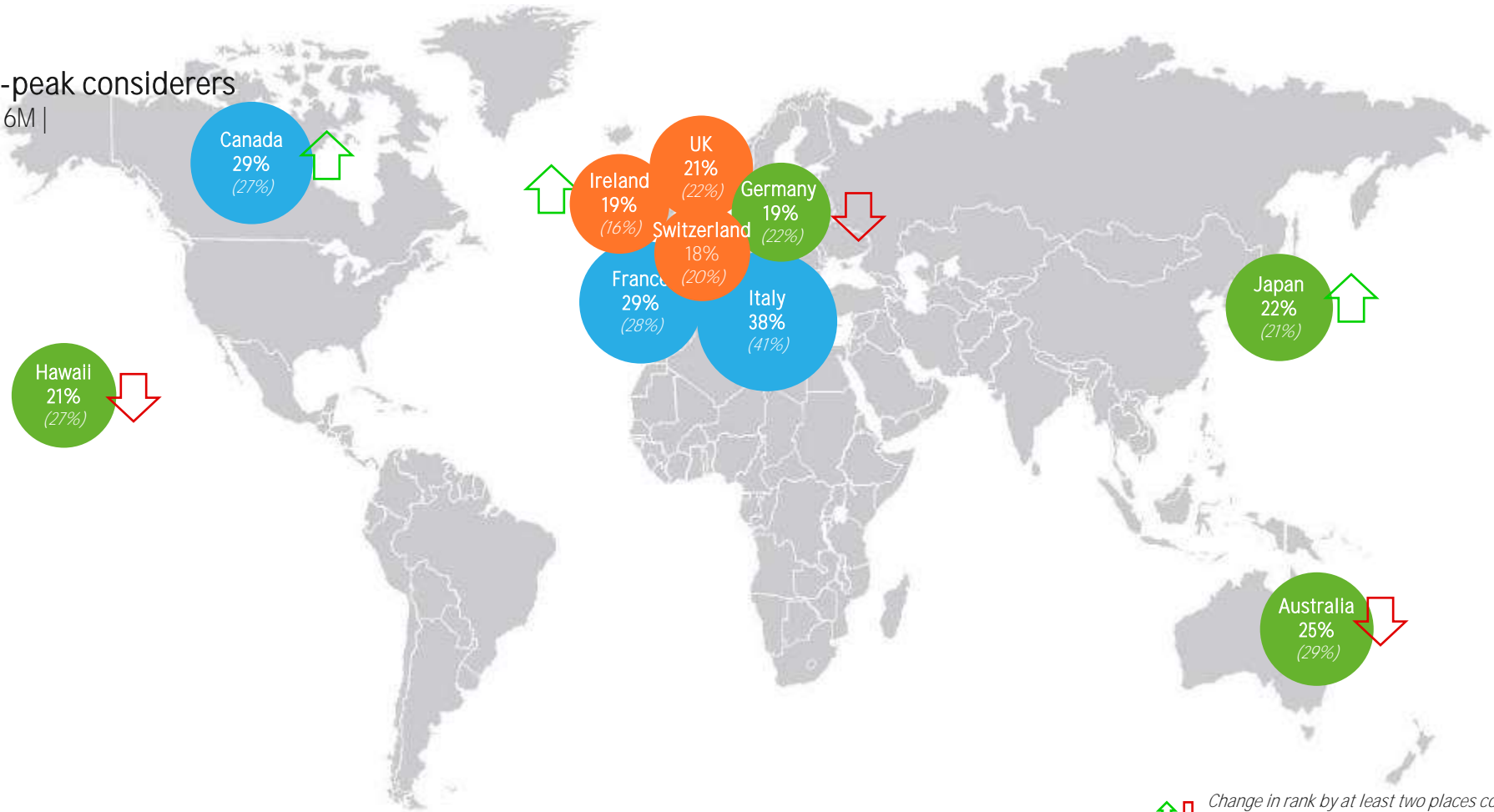
The same countries have remained in the Top 10 ranking

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 = 487 Previous 6 months n = 543
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, both first-choice and top 2 box preference for New Zealand are trending upwards

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

Top 2 box Preference values: 59%, 58%, 59%, 59%, 59%, 60%, 63%, 64%, 65%, 71%, 73%, 71%, 73%

First Preference values: 37%, 35%, 40%, 41%, 39%, 42%, 43%, 43%, 47%, 54%, 55%, 54%, 57%

X-axis: Q2 FY22, Q3 FY22, Q4 FY22, Q1 FY23, Q2 FY23, Q3 FY23, Q4 FY23, Q1 FY24, Q2 FY24, Q3 FY24, Q4 FY24, Q1 FY25, Q2 FY25

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

1. Sample size: Q2 FY22 – Q2 FY25 (6MRA) n = 899, 899, 899, 899, 900, 900, 900, 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 is trending upwards

New Zealand Preference KPI for off-peak considerers
AC Monitor | 6MRA | off-peak considerers

No off-peak data collected over this period

62%

69%

72%

71%

74%

—— Top 2 box Preference

44%

52%

55%

55%

57%

—— First Preference

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

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

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100% PURE NEW ZEALAND
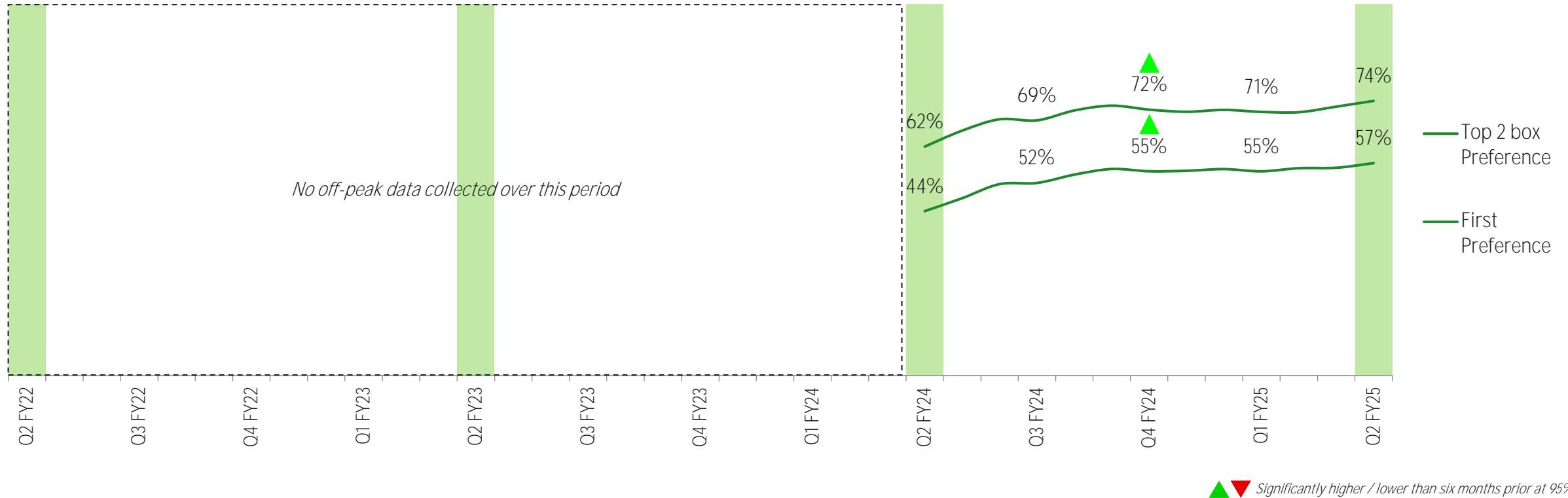
A framework to organise and optimise the brand associations that matter

Strategic Brand Drivers

Depending on brand positioning, what are the areas can TNZ leverage that might have higher impact on consumer decision making and connection – Drivers of **unique, distinct** NZ

Channels: Paid, Owned, Earned

Key Category Differentiators

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

Channels: Paid, Owned, Earned & Trade

Low Priority Drivers

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

Channels: Owned

Hygiene Factors

What are the Hygiene Factors in the travel industry. TNZs journey should start here – Before communicating how our positioning exceeds expectations, we need to demonstrate these hygiene factors are in place

Channels: Owned, Trade

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 normal life	A place you can escape from the ordinary
Quality food & wine	Offers quality local food and wine experiences
Range of adventure	Offers a wide range of outdoor and adventure activities
Range of experiences	Offers a wide variety of tourist experiences
Relationship with the land	A destination where the people have a special relationship with the land
Relax & refresh	Ideal to relax and refresh
Safe destination	I would feel safe travelling around this destination
Unique experiences	Offers experiences that you can't get anywhere else
Indigenous culture	Has a unique indigenous culture

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

Positively, New Zealand's strategic drivers are well aligned with the top drivers of preference and so should be promoted, particularly all seasons, indigenous culture and landscapes and scenery which 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]
All seasons	1 ⬆	22 ⬇	12
Safe destination	2 ⬆	8	6
Indigenous culture	3 ⬆	19	17
Range of adventure	4	5	8
Landscapes & scenery	5 ⬆	14 ⬇	2
Range of experiences	6	4 ⬆	19
Fun & enjoyment	7 ⬇	1	4
Clean & unpolluted	8	11	9
Excitement	9 ⬇	2	*
Amazing beaches	10 ⬆	24	*
Unique experiences	11	7	10
Relationship with the land	12 ⬆	21 ⬇	5
Relax & refresh	13	13	16
Family friendly	14 ⬆	23 ⬇	7
Iconic attractions	15 ⬆	20	22

	2024 rank	2023 rank	2022 rank[1]
Local culture	16 ⬇	9	13
Easy to travel around	17	3 ⬆	26
Affordable activities	18	18 ⬆	29
Escape the ordinary	19 ⬇	6	11
Friendly people	20	16	14
Wildlife experiences	21 ⬇	15 ⬆	28
Quality food & wine	22	25 ⬆	30
Interesting cities	23 ⬇	17	15
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 more strongly on its higher impact drivers but boosting **perceptions of New Zealand's suitability to travel across all seasons deserves focus, as does its** family friendliness, amazing beaches and opportunities to relax and refresh

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

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

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
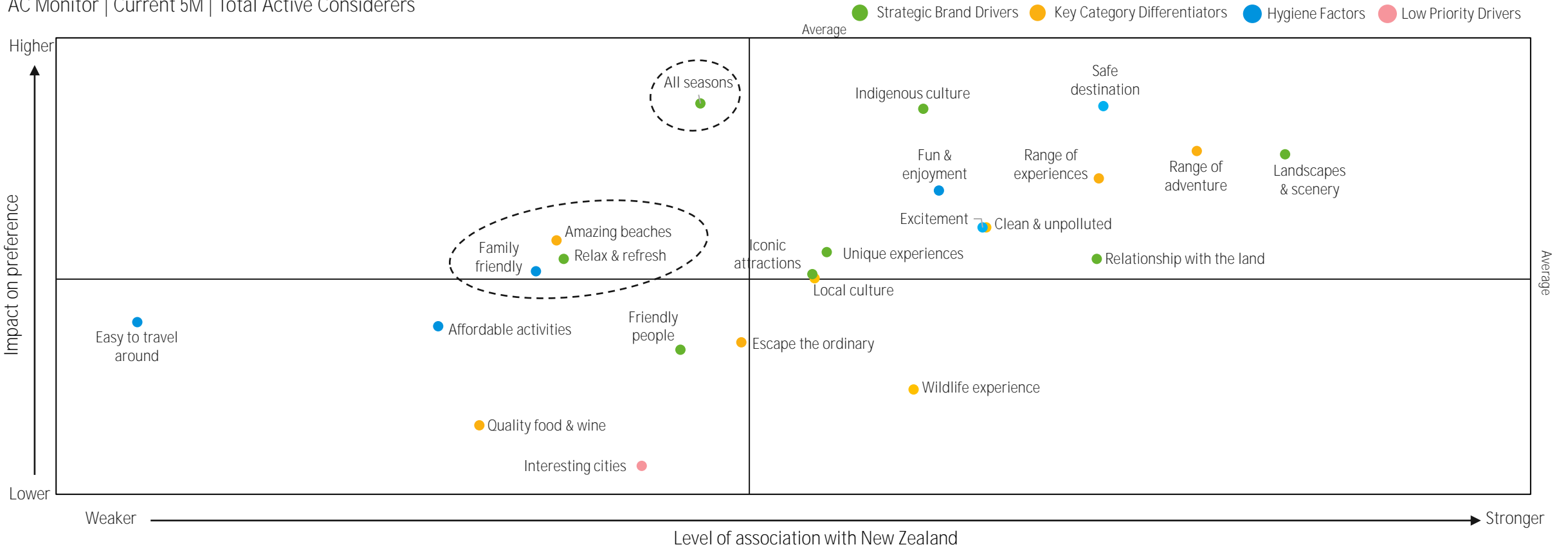
To drive preference among off-peak considerers there is an opportunity to improve perceptions of **New Zealand's suitability to travel across all seasons, its family friendliness, amazing beaches and** opportunities to relax and refresh

Brand Associations of New Zealand x Impact on preference | off-peak considerers
AC Monitor | Current 5M | off-peak considerers

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

Higher

Impact on preference

Average

Indigenous culture

All seasons

Safe destination

Range of adventure

Range of experiences

Landscapes & scenery

Fun & enjoyment

Amazing beaches

Relax & refresh

Family friendly

Unique experiences

Relationship with the land

Clean & unpolluted

Excitement

Iconic attractions

Local culture

Average

Easy to travel around

Affordable activities

Friendly people

Escape the ordinary

Wildlife experience

Quality food & wine

Interesting cities

Lower

Weaker — Stronger

Level of association with New Zealand

1. Sample size: n = 487
2. Question: "Which destinations, if any, do you associate with this statement?"
3. 'Affordable to fly to' driver not included due to low impact and level of association

Relative to competitors, New Zealand has several strengths to leverage but there is an opportunity to enhance its competitive positioning on some key strategic drivers, including landscapes and scenery, unique experiences, relax and refresh and iconic attractions

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	Italy	France	Canada	Australia	Germany
Strategic Brand Drivers	All seasons	106	85	96	99	102	110
	Indigenous culture	107	97	96	85	110	93
	Landscapes & scenery	101	80	110	101	105	105
	Unique experiences	96	100	98	91	96	128
	Relax & refresh	101	98	104	98	110	83
	Relationship with the land	112	85	98	96	99	103
	Iconic attractions	92	114	109	96	93	103
	Friendly people	98	97	104	117	97	89
Key Category Differentiators	Range of adventure	103	101	92	106	109	81
	Range of experiences	98	124	100	88	95	91
	Clean & unpolluted	110	90	74	112	103	101
	Amazing beaches	109	83	107	74	115	99
	Local culture	98	118	88	101	97	97
	Escape the ordinary	102	102	83	98	113	94
	Wildlife experience	109	78	76	108	125	88
	Quality food & wine	91	124	111	97	82	104

Actions for TNZ:

Strengths:
— Relationship with the land
— Indigenous culture
— All seasons
— Clean & unpolluted
— Amazing beaches
— Wildlife experiences

Drivers to dial up:
— Landscapes & Scenery
— Relax & Refresh
— Unique experiences
— Iconic attractions
— Quality food & wine

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

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New Zealand's performance across hygiene and low priority factors is, at best, on par with key competitors with the greatest need to boost its competitive positioning on fun and enjoyment and ease of travelling 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	Italy	France	Canada	Australia	Germany
Hygiene Factors	Safe destination	100	98	104	108	87	110
	Fun & enjoyment	95	109	112	91	97	100
	Excitement	100	94	108	88	107	103
	Family friendly	97	100	98	114	96	100
	Affordable activities	100	94	109	113	92	97
	Easy to travel around	92	105	96	115	95	107
	Affordable to fly to	98	106	116	114	81	92
Low Priority	Interesting cities	90	107	108	92	97	116

Actions for TNZ:

Drivers to dial up:
— Fun & Enjoyment
— 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
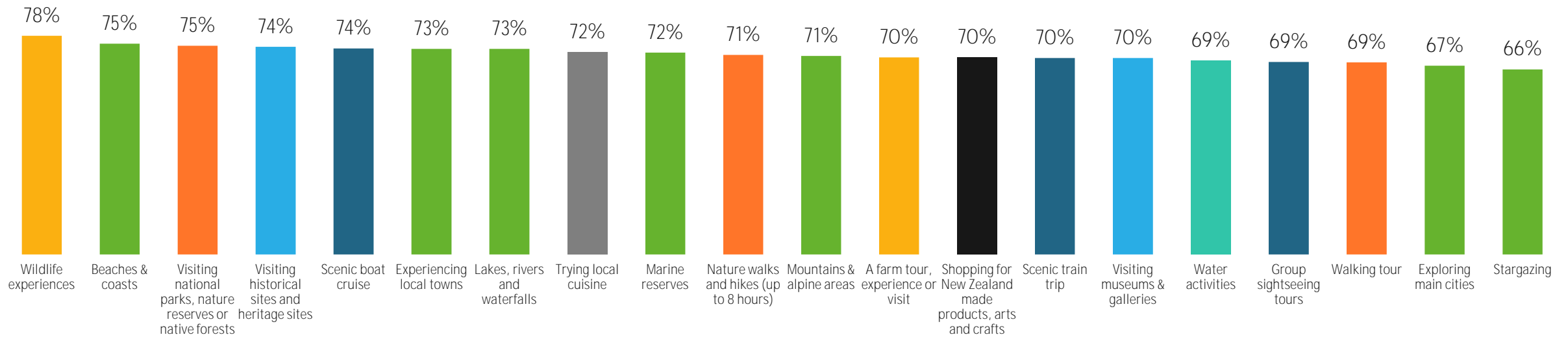Heat map shading is across rows, i.e. compares the six countries on that attribute

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38

ACs are interested in a wide range of activities, presenting an opportunity to promote the variety of experiences on offer in New Zealand – there is an opportunity to dial up messaging of certain activities, like scenic boat cruises, to off-peak considerers

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

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

Activity	%
Wildlife experiences	78%
Beaches & coasts	75%
Visiting national parks, nature reserves or native forests	75%
Visiting historical sites and heritage sites	74%
Scenic boat cruise	74%
Experiencing local towns	73%
Lakes, rivers and waterfalls	73%
Trying local cuisine	72%
Marine reserves	72%
Nature walks and hikes (up to 8 hours)	71%
Mountains & alpine areas	71%
A farm tour, experience or visit	70%
Shopping for New Zealand made products, arts and crafts	70%
Scenic train trip	70%
Visiting museums & galleries	70%
Water activities	69%
Group sightseeing tours	69%
Walking tour	69%
Exploring main cities	67%
Stargazing	66%

off-peak considerers

Activity	%	Significant
Wildlife experiences	81%	
Beaches & coasts	78%	
Visiting national parks...	76%	
Visiting historical sites...	77%	
Scenic boat cruise	78%	▲
Experiencing local towns	75%	
Lakes, rivers and waterfalls	78%	▲
Trying local cuisine	76%	
Marine reserves	75%	
Nature walks and hikes	75%	▲
Mountains & alpine areas	72%	
A farm tour...	72%	
Shopping for NZ made...	74%	
Scenic train trip	72%	
Visiting museums & galleries	72%	
Water activities	73%	
Group sightseeing tours	74%	▲
Walking tour	74%	▲
Exploring main cities	68%	
Stargazing	72%	▲

▲▼ *Significantly higher / lower than non-considerers of Off-Peak*

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

Guiding ACs on the ideal time of year to enjoy desired activities should be a priority as this is the top knowledge gap of ACs and provides an opportunity to promote off-peak travel; positively, weather concerns are lessening which is promising for off-peak arrivals

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

Project Koru also found that some of these messages also need to be addressed at the brand level not just the tactical level (planning and booking)
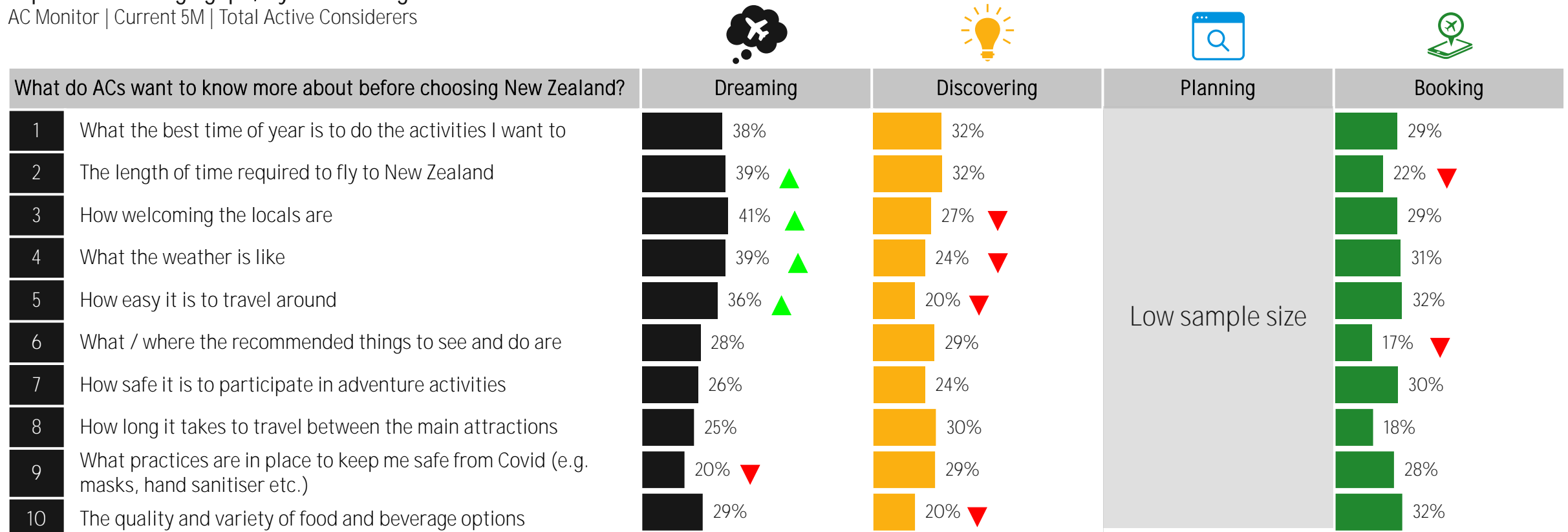
	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	What the best time of year is to do the activities I want to	34%	NA
2	The length of time required to fly to New Zealand	33%	36%
3	How welcoming the locals are	33%	34%
4	What the weather is like	31% ▼	39%
5	How easy it is to travel around	28% ▼	35%
6	What / where the recommended things to see and do are	26%	28%
7	How safe it is to participate in adventure activities	26%	31%
8	How long it takes to travel between the main attractions	26%	28%
9	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	25%	28%
10	The quality and variety of food and beverage options	25% ▼	33%

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?"

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Messages around flight duration, how welcoming the locals are, the weather and ease of travelling around need to be surfaced early in the AC journey as dreamers are more likely to have these knowledge gaps

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

What do ACs want to know more about before choosing New Zealand?	Dreaming	Discovering	Planning	Booking
1	What the best time of year is to do the activities I want to	38%	32%		29%
2	The length of time required to fly to New Zealand	39% ▲	32%		22% ▼
3	How welcoming the locals are	41% ▲	27% ▼		29%
4	What the weather is like	39% ▲	24% ▼		31%
5	How easy it is to travel around	36% ▲	20% ▼		32%
6	What / where the recommended things to see and do are	28%	29%	Low sample size	17% ▼
7	How safe it is to participate in adventure activities	26%	24%		30%
8	How long it takes to travel between the main attractions	25%	30%		18%
9	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	20% ▼	29%		28%
10	The quality and variety of food and beverage options	29%	20% ▼		32%

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

Key knowledge gaps are broadly similar between off-peak and peak-only considerers, hence similar tactical communications will resonate with both audiences

Top ten knowledge gaps for off-peak considerers
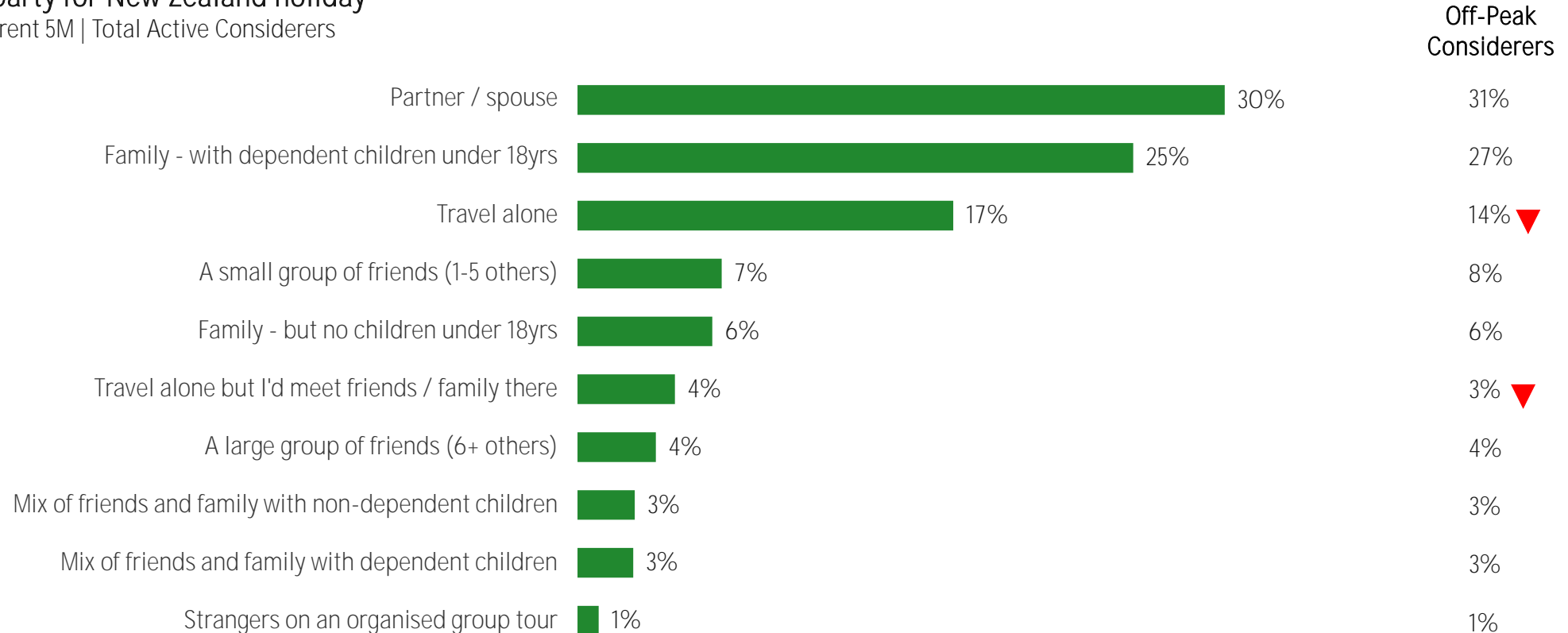AC Monitor | Current 5M | off-peak considerers

	What do ACs want to know more about before choosing New Zealand?	off-peak considerers	Peak-Only Considerers
1	What the best time of year is to do the activities I want to	35%	31%
2	The length of time required to fly to New Zealand	33%	33%
3	How welcoming the locals are	35%	30%
4	What the weather is like	31%	33%
5	How easy it is to travel around	30%	25%
6	What / where the recommended things to see and do are	29%	22%
7	How safe it is to participate in adventure activities	28%	22%
8	How long it takes to travel between the main attractions	27%	23%
9	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	26%	25%
10	The quality and variety of food and beverage options	25%	25%

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

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1. Sample size: off-peak considerers n = 289 | Peak-Only Considerers n = 161
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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USA ACs are most likely to travel to New Zealand with their partner and/or family – this is also the case for off-peak considerers who are also less likely to travel alone

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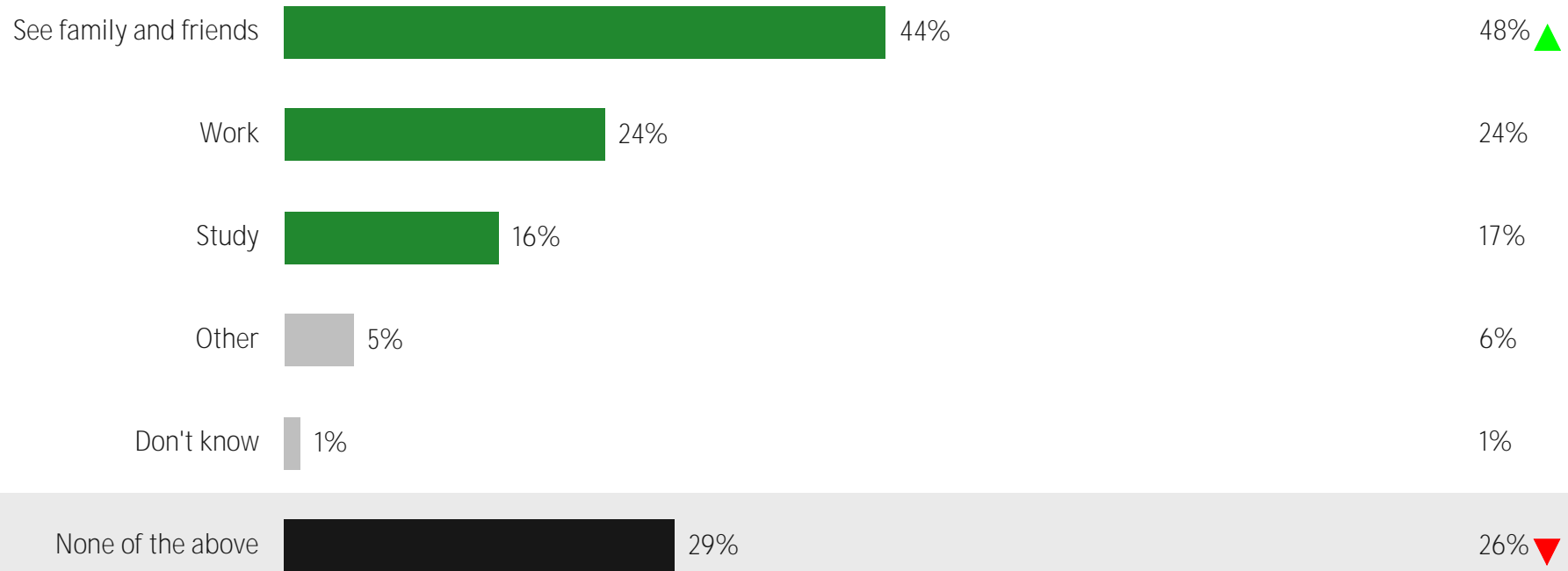AC Monitor | Current 5M | Total Active Considerers

Off-Peak
Considerers

Partner / spouse	30%	31%
Family - with dependent children under 18yrs	25%	27%
Travel alone	17%	14% ▼
A small group of friends (1-5 others)	7%	8%
Family - but no children under 18yrs	6%	6%
Travel alone but I'd meet friends / family there	4%	3% ▼
A large group of friends (6+ others)	4%	4%
Mix of friends and family with non-dependent children	3%	3%
Mix of friends and family with dependent children	3%	3%
Strangers on an organised group tour	1%	1%

▲▼ *Significantly higher / lower than non-considerers of Off-Peak*

1. Sample size: Total ACs n = 750 | off-peak considerers n = 487
2. Question "Who are you most likely to travel with on your trip to New Zealand?"

A sizable minority of ACs intend to visit family and friends while holidaying in New Zealand - this rises to 48% among off-peak considerers

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

Off-Peak Considerers

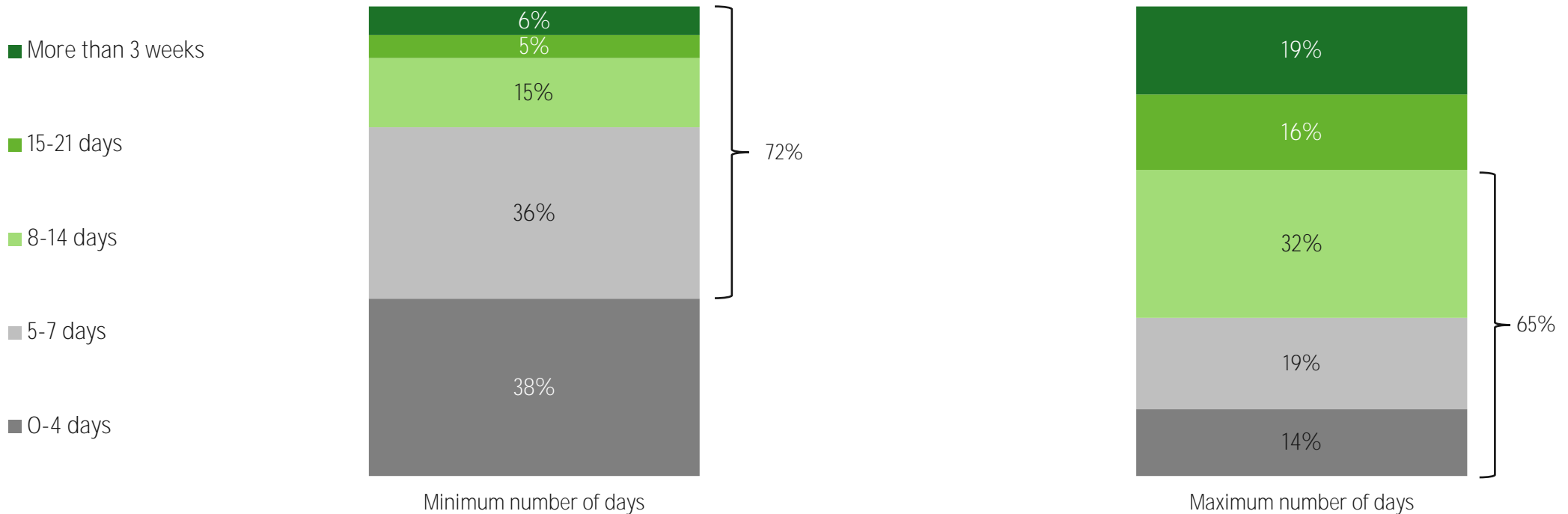| Category	Total	Off-Peak Considerers
See family and friends	44%	48% ▲
Work	24%	24%
Study	16%	17%
Other	5%	6%
Don't know	1%	1%
None of the above	29%	26% ▼

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

▲▼ *Significantly higher / lower than non-considerers of Off-Peak*

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1. Sample size: Total ACs n = 750 | off-peak considerers n = 487
2. Question "When considering travelling to New Zealand for a holiday, do you also intend to…"

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Most Americans 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
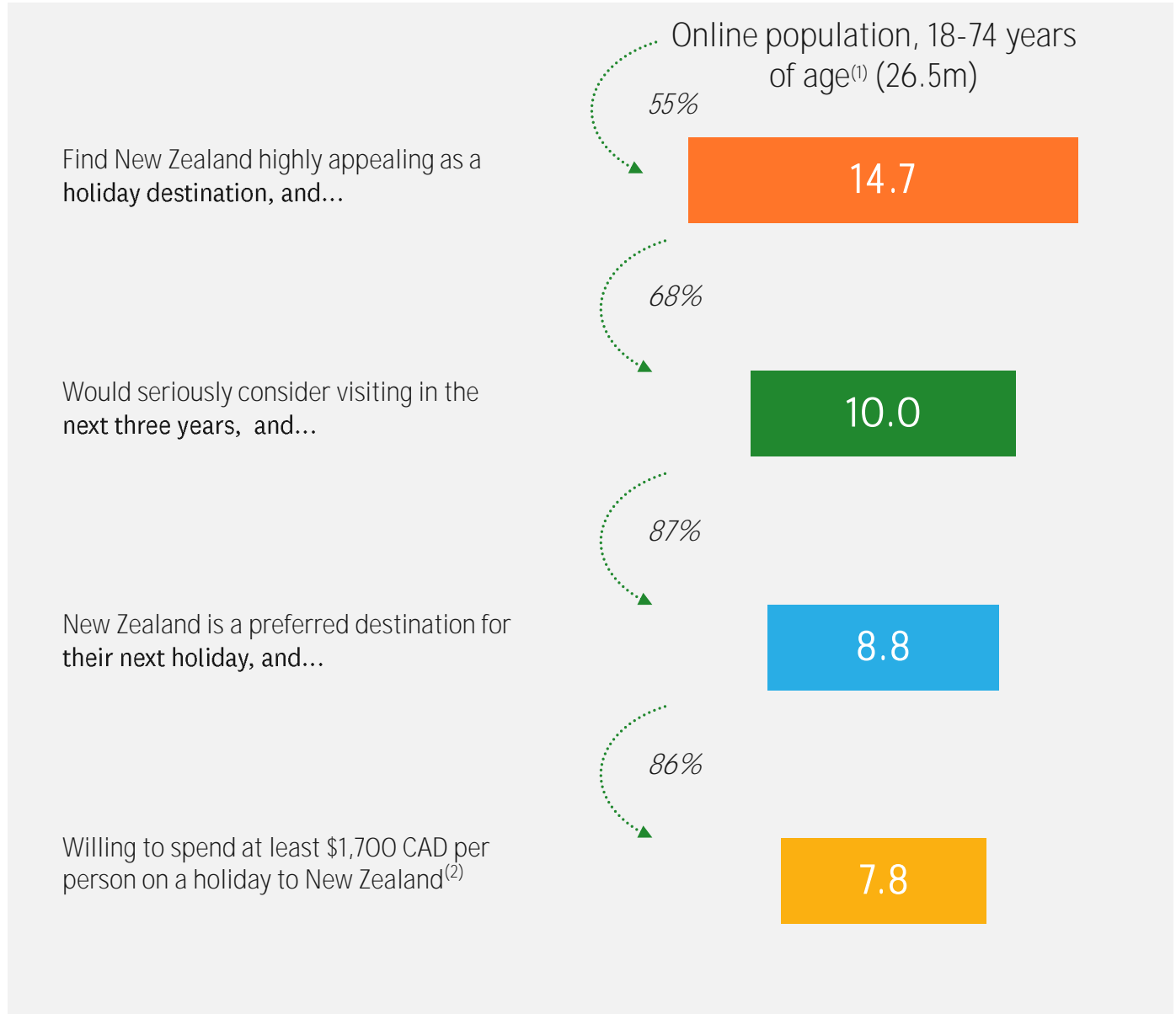AC Monitor | Current 5M | Total Active Considerers

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

Minimum number of days
- 6%
- 5%
- 15%
- 36%
- 38%

72% (bracket covering 8-14 days, 15-21 days, and 5-7 days portions)

Maximum number of days
- 19%
- 16%
- 32%
- 19%
- 14%

65% (bracket covering 0-4 days, 5-7 days, and 8-14 days portions)

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CANADA

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5

What is the size of opportunity for TNZ in Canada?

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newzealand.com

Active Considerer journey funnel – Canada

Active Considerers definition

Active Considerers find New Zealand highly appealing as a vacation destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next vacation and have a realistic budget for their visit (C$1,700 per person on a holiday to New Zealand).

Online population, 18-74 years of age[1] (26.5m)

55%

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

14.7

68%

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

10.0

87%

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

8.8

86%

Willing to spend at least $1,700 CAD per person on a holiday to New Zealand[2]

7.8

Consumer Journey funnel to New Zealand – Canada
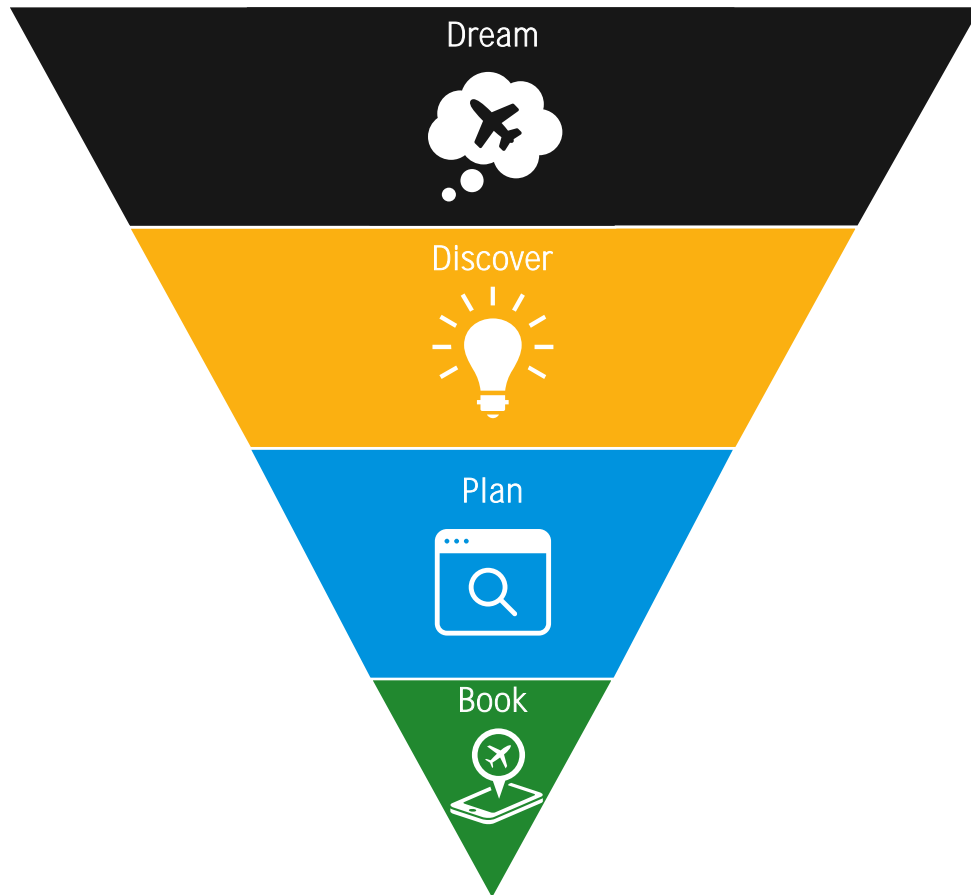
	Active Considerers (7.8m)	Q2 FY25	Q4 FY24
Dream	3.7m	48%	47%
Discover	3.3m	42%	N/A
Plan	0.1m	1%	16%
Book	0.7m	9%	37%

Size (%)

The 'Discover' layer was added in Q2 FY25 affecting comparability in size of funnel stage over time

Sample size: ACs Oct 24 n = 300
Note: The 'Discover' layer in the consumer journey funnel was added in Q2 FY25; in previous waves the funnel consisted of just 'Dream', 'Plan' and 'Book'

55

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With a stable AC incidence of 28%, equating to 7.8 million people, the opportunity in Canada remains sizeable
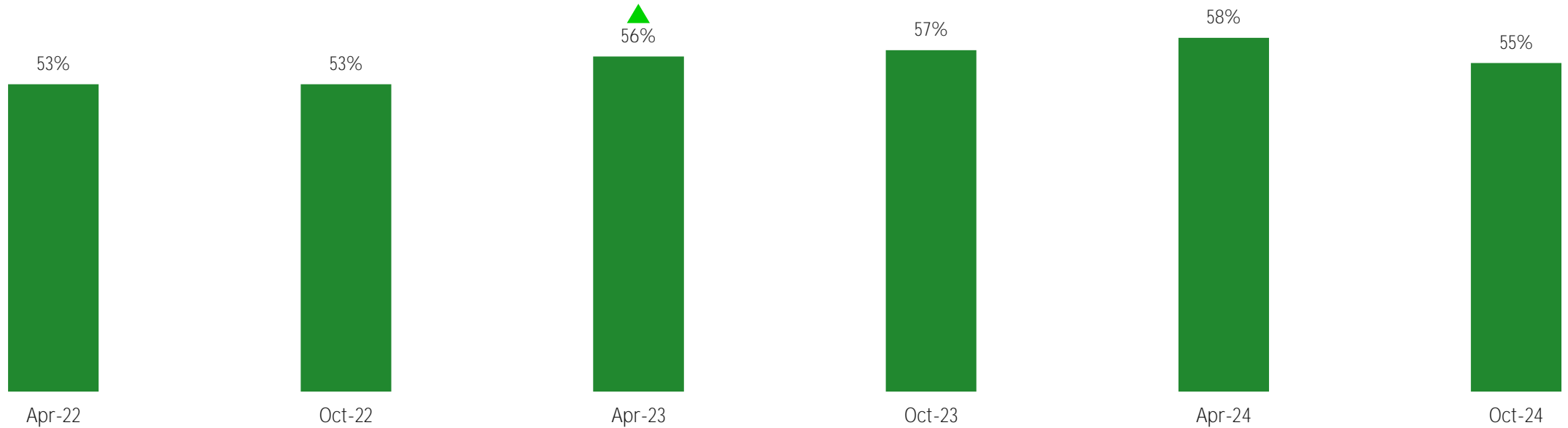
Qualifying criteria for defining ACs
AC Monitor | Oct 24 | % Online users aged 18-74

ACs – We only survey these people in more detail

This 28% equates to approx. 7.8m people

	100%	45%	55%	18%	37%	5%	32%	4%	28%
	Online Canadian aged 18-74	NZ is not highly appealing	NZ is highly appealing	Would not consider NZ	Would definitely consider NZ	NZ is not a preferred destination to visit	NZ is a preferred destination to visit	Does not meet minimum spend theshold	Would spend at least $1,700 CAD on a trip
Apr '24	100%	42%	58%	19%	39%	4%	35%	6%	29%

▲ ▼ *Significantly higher / lower than previous wave at 95%*

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Appeal for New Zealand as a holiday destination remains stable
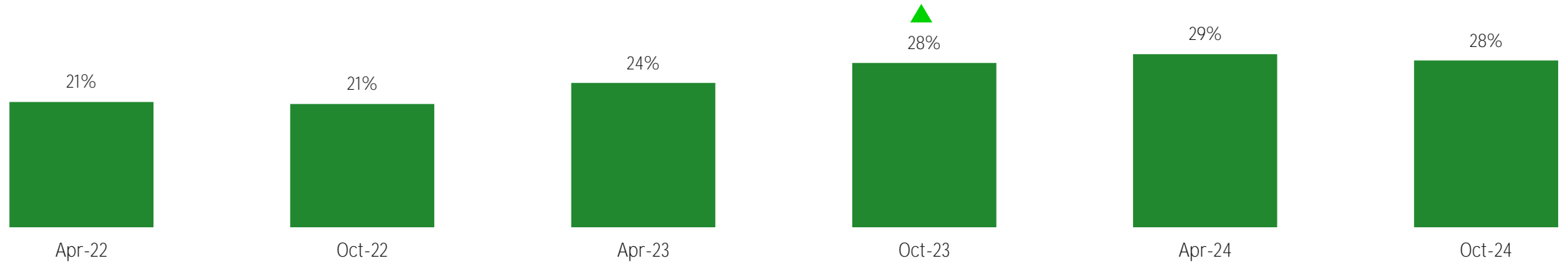
Appeal
% Online users aged 18-74

— 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

Apr-22	Oct-22	Apr-23	Oct-23	Apr-24	Oct-24
53%	53%	▲ 56%	57%	58%	55%

▲▼ *Significantly higher / lower than previous wave at 95%*

Sample size: Apr 22 n = 4,148 | Oct 22 n = 2,001 | Apr 23 n = 1,785 | Oct 23 n = 1,374 | Apr 24 n = 1,957 | Oct 24 n = 1,356
Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

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The AC incidence in Canada has sustained the peak levels achieved a year ago

Incidence of ACs
% Online users aged 18-74

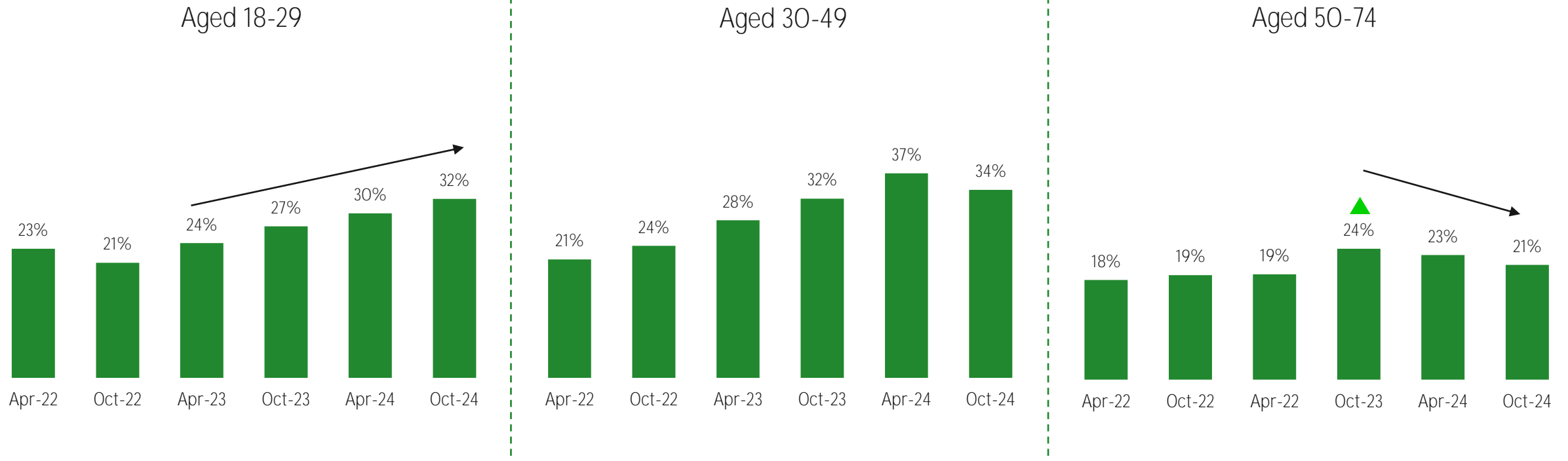| Apr-22	Oct-22	Apr-23	Oct-23	Apr-24	Oct-24
21%	21%	24%	28% ▲	29%	28%

▲▼ *Significantly higher / lower than previous wave at 95%*

Sample sizes: Apr 22 n = 4,148 | Oct 22 n = 2,001 | Apr 23 n = 1,785 | Oct 23 n = 1,374 | Apr 24 n = 1,957 | Oct 24 n = 1,356

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Despite a stable AC incidence at the overall level, it is shifting upwards among those aged 18-29 years, yet downwards among those aged 50-74

Incidence of ACs
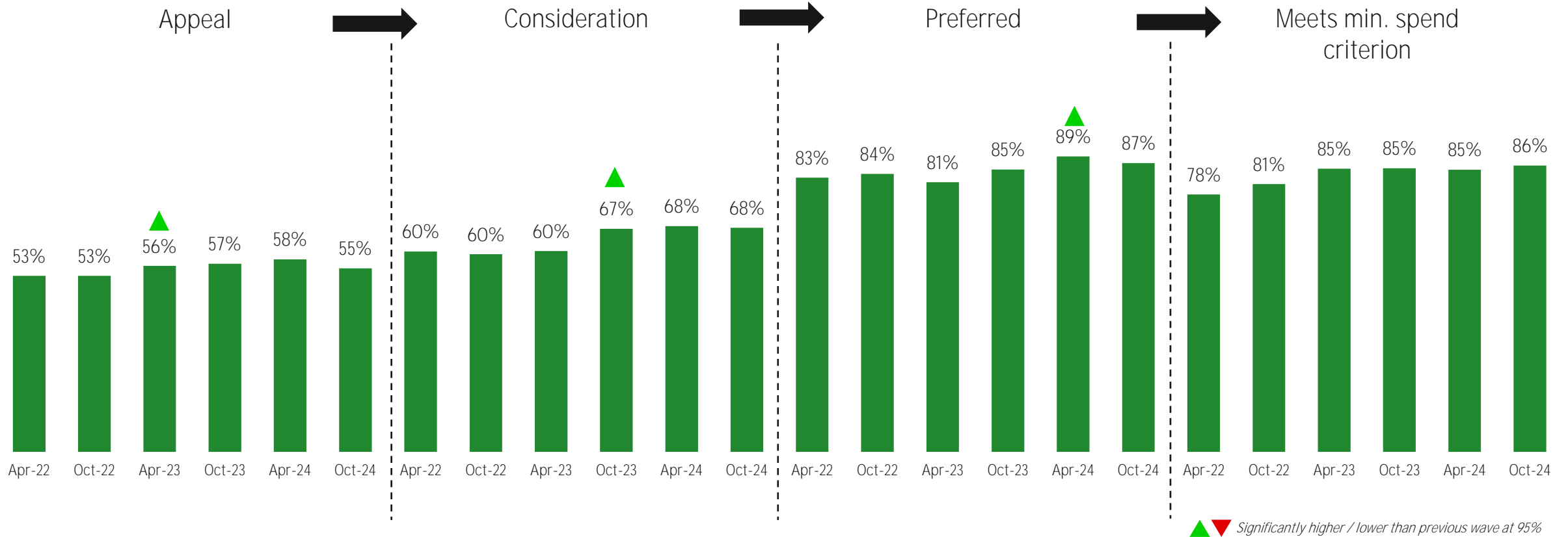% Online users aged 18-74| By age group

Aged 18-29

Apr-22	Oct-22	Apr-23	Oct-23	Apr-24	Oct-24
23%	21%	24%	27%	30%	32%

Aged 30-49

Apr-22	Oct-22	Apr-23	Oct-23	Apr-24	Oct-24
21%	24%	28%	32%	37%	34%

Aged 50-74

Apr-22	Oct-22	Apr-22	Oct-23	Apr-24	Oct-24
18%	19%	19%	24%	23%	21%

▲▼ *Significantly higher / lower than previous wave at 95%*

Metrics are stable across all stages of the AC funnel
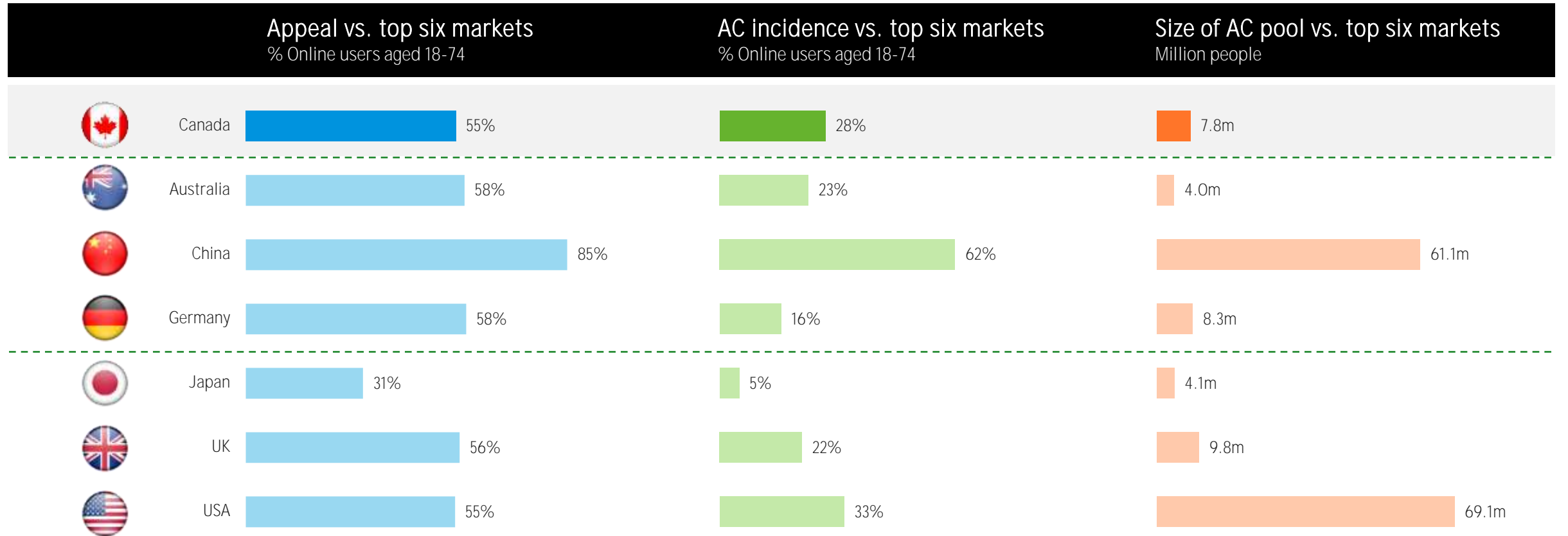
Conversion of ACs through the Consideration Funnel
% Online users aged 18-74

| Appeal | → | Consideration | → | Preferred | → | Meets min. spend criterion |

Appeal
- Apr-22: 53%
- Oct-22: 53%
- Apr-23: 56% ▲
- Oct-23: 57%
- Apr-24: 58%
- Oct-24: 55%

Consideration
- Apr-22: 60%
- Oct-22: 60%
- Apr-23: 60%
- Oct-23: 67% ▲
- Apr-24: 68%
- Oct-24: 68%

Preferred
- Apr-22: 83%
- Oct-22: 84%
- Apr-23: 81%
- Oct-23: 85%
- Apr-24: 89% ▲
- Oct-24: 87%

Meets min. spend criterion
- Apr-22: 78%
- Oct-22: 81%
- Apr-23: 85%
- Oct-23: 85%
- Apr-24: 85%
- Oct-24: 86%

▲▼ *Significantly higher / lower than previous wave at 95%*

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With 7.8 million ACs, Canada continues to represent an attractive opportunity for TNZ

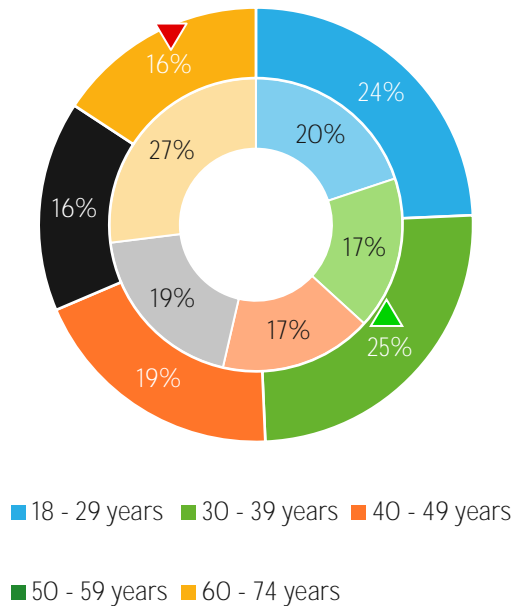|	**Appeal vs. top six markets** % Online users aged 18-74	**AC incidence vs. top six markets** % Online users aged 18-74	**Size of AC pool vs. top six markets** Million people
Canada	55%	28%	7.8m
Australia	58%	23%	4.0m
China	85%	62%	61.1m
Germany	58%	16%	8.3m
Japan	31%	5%	4.1m
UK	56%	22%	9.8m
USA	55%	33%	69.1m

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ACs are concentrated in Ontario and skewed towards males and those aged 30-39 years; 32% of the AC pool have pre-school or school-aged children
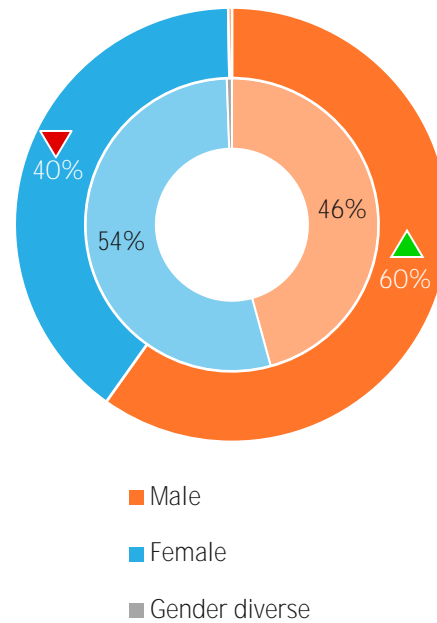
Profile of Active Considerers
% Active Considerers vs Non-Active Considerers | Oct 24

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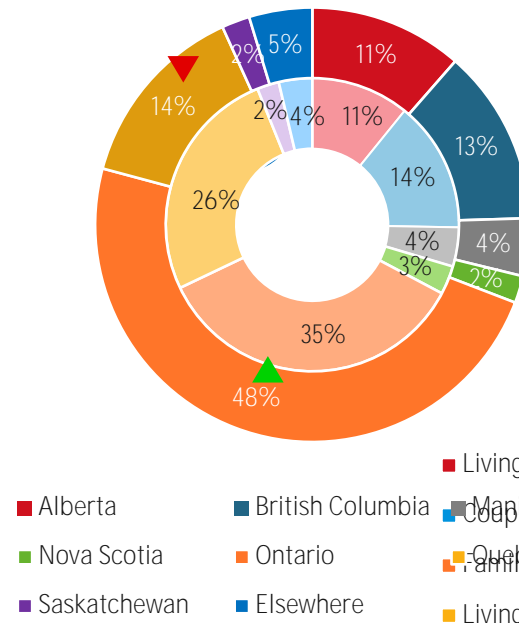Inner ring : Canada non-Active Considerers

By age segment

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

Outer ring: 24%, 17%, 25%, 19%, 16%, 16%
Inner ring: 20%, 17%, 19%, 19%, 27%

By gender

- Male
- Female
- Gender diverse

Outer ring: 60%, 40%
Inner ring: 46%, 54%

By region

- Alberta
- British Columbia
- Manitoba
- Nova Scotia
- Ontario
- Quebec
- Saskatchewan
- Elsewhere

Outer ring: 11%, 13%, 4%, 2%, 48%, 26%, 14%, 5%
Inner ring: 11%, 14%, 4%, 3%, 35%, 26%, 2%, 2%, 4%

Household Composition

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

23%, 7%, 24%, 10%, 22%, 9%, 6%

▲▼ Significantly higher / lower than non AC's

Sample sizes: ACs n = 363 | Non ACs n = 989
Household composition (AC completes) n = 300

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While summer remains the most preferred time to visit New Zealand, consideration for autumn has recently increased, establishing it as the most attractive off-peak season

Seasons – consideration & preference
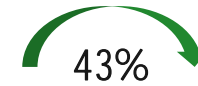% Active Considerers | Oct 24

Conversion of consideration to preference
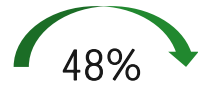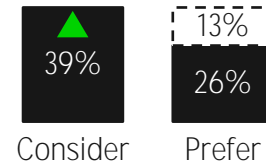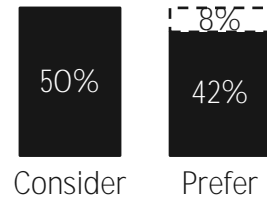
	Spring Off-peak	Summer Peak	Autumn Off-peak	Winter Off-peak
Conversion	48%	84%	67%	43%
Consider	21%	50%	39%	23%
Prefer (Opportunity)	11% / 10% ▼	8% / 42%	13% / 26%	13% / 10%
Apr 24 Consider	23%	44%	28%	21%
Apr 24 Prefer	15%	38%	20%	16%

Opportunity

Off-peak consideration

63%

60%

Off-peak   Off-peak   Off-peak

▲▼ *Significantly higher / lower than previous wave at 95%*

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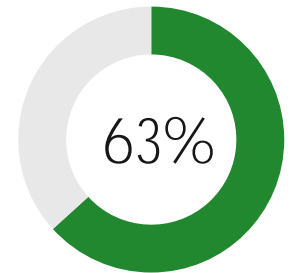
Summer considerers tend to skew older while Autumn considerers skew towards middle-income households and Spring considerers skew towards ACs in Alberta

Profile of seasonal considerers
% Active Considerers | Oct 24

		Spring Off-peak	Summer Peak	Autumn Off-peak	Winter Off-peak
Gender	Male	57%	58%	63%	66%
	Female	41%	41%	36%	34%
	Gender diverse	2%	1%	1%	0%
Age	18 to 29 yrs	30%	22%	29%	33%
	30 to 39 yrs	22%	19% ▼	29%	32%
	40 to 49 yrs	20%	21%	19%	21%
	50 to 59 yrs	13%	18%	11%	8%
	60 to 74 yrs	15%	20% ▲	12%	6%
Location	Alberta	28% ▲	13%	14%	15%
	British Columbia	14%	13%	12%	10%
	Manitoba	1%	7%	2%	3%
	Nova Scotia	3%	3%	3%	1%
	Ontario	37% ▼	49%	47%	54%
	Quebec	13%	12%	15%	13%
	Saskatchewan	1%	1%	2%	0%
	Elsewhere	3%	3%	5%	4%
Income	Less than CAN $60,000	32%	36%	32%	32%
	CAN $60,000 to $99,999	33%	28%	43% ▲	38%
	CAN $100,000 or more	35%	35%	25% ▼	30%
	Prefer not to say	0%	1%	0%	0%
Household	SINK / DINK	55%	59%	64%	50%
	Family (dependent children)	33%	32%	28%	43% ▲
	Family (independent children)	12%	9%	8%	7%

Sample sizes: Spring n = 63 | Summer n = 154 | Autumn n = 112 | Winter n = 62

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

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Compared to summer considerers, off-peak considerers skew younger and towards middle-income households

Profile of Seasonal Considerers
% Active Considerers | Oct 24

Peak

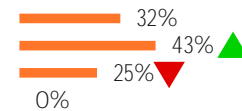|	
Male	58%
Female	41%
Gender diverse	1%

18 to 29 yrs	22%
30 to 39 yrs	19% ▼
40 to 49 yrs	21%
50 to 59 yrs	18%
60 to 74 yrs	20% ▲

Alberta	13%
British Columbia	13%
Manitoba	7%
Nova Scotia	3%
Ontario	49%
Quebec	12%
Saskatchewan	1%
Elsewhere	3%

Less than CAN $60,000	36%
CAN $60,000 to $99,999	28%
CAN $100,000 or more	35%
Prefer not to say	1%

SINK / DINK	59%
Family (dependent children)	32%
Family (independent children)	9%

Off-peak

	63%
	36%
	1%

	30% ▲
	28%
	19%
	12% ▼
	11% ▼

	14%
	12%
	3% ▼
	3%
	49%
	13%
	2%
	5%

	32%
	38% ▲
	30%
	0%

	58%
	33%
	9%

Sample sizes: Summer n = 154 | Off-peak n = 182
off-peak considerers are those who would consider travelling to New Zealand in Spring, Winter or Autumn

▲▼ *Significantly higher / lower than non-considerers of that / those season(s)*

65

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

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Brand messaging should continue to tap into key motivations to visit by emphasizing New Zealand's stunning landscapes and opportunities for fun and exploration; less emphasis is needed on nature immersion, as it has become a less compelling motivator to visit

Reasons to visit New Zealand
% Active Considerers | Oct 24

Apr 24

Reason	Oct 24	Apr 24
To experience beautiful landscapes/scenery	52%	59%
To have fun & enjoy myself	42%	45%
To learn & explore new things	42%	44%
To feel a sense of adventure	39%	36%
To take a break from the routine, stresses and pressures of everyday life	34%	32%
To feel relaxed and refreshed	34%	39%
To enjoy local food and beverages	33%	38%
To get in touch with nature	30% ▼	44%
To create lasting memories through photography	30%	32%
To interact with people of a different culture or lifestyle	28%	31%
To visit a place that has inspired me through film / TV	24%	26%
To connect and spend time with important people in my life	24%	18%
To indulge & pamper myself	22%	22%
To show my children a different way of life	17%	17%
To embrace challenges and personal growth	17%	12%
For a specific event (e.g. sport event, family wedding etc.)	12%	9%

▲▼ *Significantly higher / lower than previous wave at 95%*

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Preference for Australia has rebounded, re-establishing it as the top competitor destination followed by Italy and Japan, which has also seen a recent increase in preference

Top ten competitor set for ACs
% Active Considerers | Oct 24 vs. Apr 24

Ireland
22%
(15%)

France
27%
(29%)

Italy
30%
(35%)

Spain
17%
(18%)

Switzerland
19%
(18%)

Greece
22%
(20%)

Japan
27%
(21%)

Hawaii
25%
(30%)

Caribbean
21%
(24%)

Australia
37%
(27%)

UK, Mexico and USA have dropped out of the top 10 competitor list

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

Preference for AU has rebounded:
- From 34% Oct '23
- Down to 27% Apr '24;
- Back to 37% Oct '24

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

Sample sizes: Total ACs Oct 24 n = 300 | Apr 24 n = 301
% selected destination in their top five preferred destinations
Figures in brackets denote previous 6 months
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 for New Zealand remain stable over time

Preference KPI
% Active Considerers | % off-peak considerers

—— Top 2 box Preference   —— First Preference

57%   61%   55%   57%   57%   58%

31%   36%   31%   31%   35%   32%

| Apr 22 | Oct 22 | Apr 23 | Oct 23 | Apr-24 | Oct-24 |

First preference scores:

| off-peak considerers[1] | | | 32% | 34% | 34% |

▲▼ *Significantly higher / lower than previous wave at 95%*

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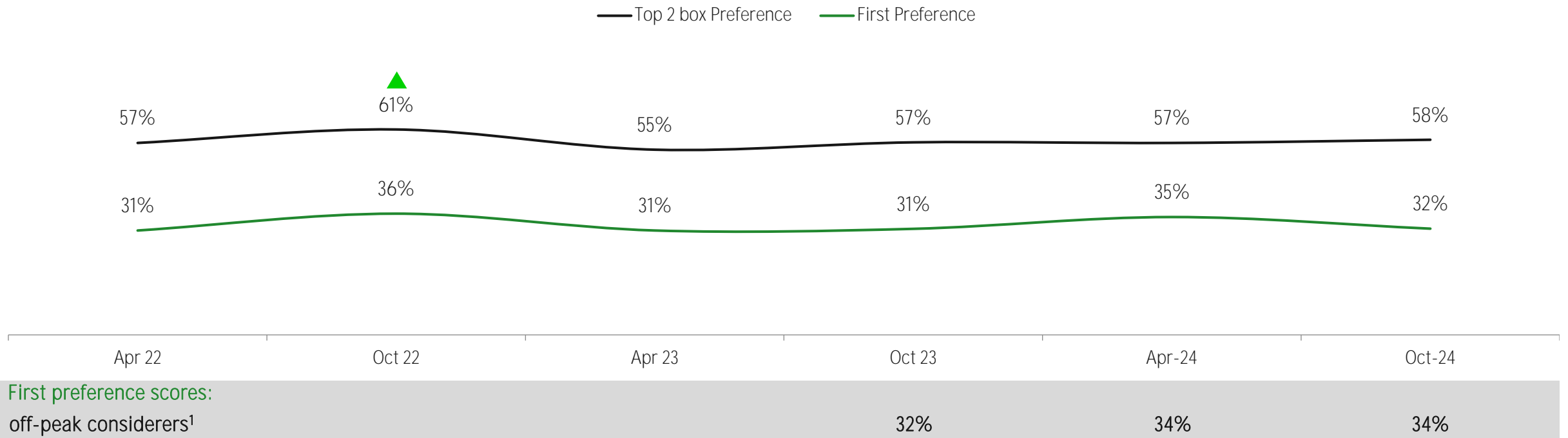
A framework to organize and optimize the brand associations that matter

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 attribute wording

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

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

Shorthand	Full wording
Interesting cities	Has interesting cities to visit
Landscapes & scenery	Spectacular natural landscapes and scenery
Local culture	Offers opportunities to experience local culture
Escape normal life	A place you can escape from the ordinary
Quality food & wine	Offers quality local food and wine experiences
Range of adventure	Offers a wide range of outdoor and adventure activities
Range of experiences	Offers a wide variety of tourist experiences
Relationship with the land	A destination where the people have a special relationship with the land
Relax & refresh	Ideal to relax and refresh
Safe destination	I would feel safe travelling around this destination
Unique experiences	Offers experiences that you can't get anywhere else
Indigenous culture	Has a unique indigenous culture

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 and on an ad hoc basis on emerging markets

The brand driver analysis included in this report is based on data from Apr-24 and Oct-24

Brand messaging should focus on key drivers of preference, emphasizing New Zealand as an exciting and fun destination with stunning beaches and landscapes, and a friendly, safe environment for visitors; messaging around local culture can also be dialled up

Brand Associations which drive preference for NZ
AC Monitor | % | Oct 24 (Apr '24 – Oct '24 combined) | Total Active Considerers | Index (see appendix)

Latest results	Oct '24 rank	Apr '24 rank[1]	2022 rank[2]
Excitement	1	1	*
Safe destination	2 ⇧	9 ⇩	1
Amazing beaches	3 ⇧	7	*
Fun & enjoyment	4	5	4
Landscapes & scenery	5	3	2
Clean & unpolluted	6	4	3
Friendly people	7 ⇧	14 ⇩	6
Escape the ordinary	8 ⇩	2 ⇧	16
Wildlife experiences	9	6 ⇧	10
Range of adventure	10	12 ⇩	5
Local culture	11 ⇧	16	15
All seasons	12	10 ⇧	19
Range of experiences	13 ⇧	18 ⇩	7
Family friendly	14	17 ⇩	12
Relationship with the land	15	15 ⇩	11

Latest results	Oct '24 rank	Apr '24 rank[1]	2022 rank[2]
Unique experiences	16	19 ⇩	13
Relax & refresh	17 ⇧	21 ⇩	9
Iconic attractions	18 ⇧	22 ⇩	17
Quality food & wine	19 ⇧	24	21
Indigenous culture	20	20 ⇩	14
Easy to travel around	21 ⇩	13 ⇧	20
Interesting cities	22	23 ⇩	18
Affordable activities	23	25	22
Affordable to fly to	24	26	23

Changes in brand attribution list affect comparability in ranking over time

Strategic Brand Drivers	Key Category Differentiators
Low Priority Drivers	Hygiene Factors

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

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

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New Zealand as a destination demonstrates stronger associations with higher impact drivers – the **exception to this is 'all seasons' which is a higher impact driver, yet where perceptions could be** enhanced

Brand Associations of New Zealand x Impact on preference
% All markets

Average

Higher

Impact on preference

Amazing beaches

Excitement

Safe destination

Fun & enjoyment

Clean & unpolluted

Landscapes & scenery

Wildlife experience

Escape normal life

Friendly people

Range of adventure

Range of experiences

All seasons

Family friendly

Local culture

Relax & refresh

Unique experiences

Quality food & wine

Relationship with the land

Iconic attractions

Indigenous culture

Easy to travel around

Average

Also low impact / low association:
'Affordable activities'
'Affordable to fly to'

Interesting cities

Lower

Weaker ——————————————————————————→ Stronger

Level of association with New Zealand

- ● Strategic brand drivers
- ● Key category differentiators
- ● Hygiene Factors
- ● Low Priority

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Relative to competitors, New Zealand has several strategic and category brand strengths it can leverage but there is room to boost perceptions of its year-round travel suitability, with opportunities to visit iconic attractions and sample quality food and wine

Relative brand positioning for Strategic Brand Drivers and Key Category Differentiators
% Active Considerers | Oct 24 | Total (New Zealand and top five competitors) | Index (see appendix)

		New Zealand	Australia	Italy	Japan	France	Hawaii
Strategic Brand Drivers	Landscapes & scenery	105	91	99	91	95	107
	Friendly people	108	105	98	92	75	85
	All seasons	98	101	109	92	94	113
	Relationship with the land	109	100	83	90	65	112
	Unique experiences	101	102	90	119	83	93
	Relax & refresh	101	94	100	92	85	125
	Iconic attractions	89	105	138	110	123	81
	Indigenous culture	104	108	75	97	71	120
Key Category Differentiators	Amazing beaches	103	107	93	55	91	145
	Clean & unpolluted	113	99	85	91	64	90
	Escape normal life	97	106	108	100	89	106
	Wildlife experience	119	131	43	62	48	97
	Range of adventure	109	94	79	84	87	114
	Local culture	98	97	102	119	96	94
	Range of experiences	98	97	96	107	120	96
	Quality food & wine	88	98	139	103	150	79

Actions for TNZ:

Strengths:
— Landscapes & scenery
— Friendly people
— Relationship with the land
— Clean & unpolluted
— Wildlife
— Range of adventure

Drivers to dial up:
— All seasons
— Iconic attractions
— Escape normal life
— Quality food & wine

Sample size: Oct 24 n = 300
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

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New Zealand is on par with its key competitors on perceptions of safety, family friendliness and having affordable activities but it falls short on its perceived opportunities for fun, ease of travelling around and affordability to fly to

Relative brand positioning for Hygiene Factors and Low Priority Drivers
% Active Considerers | Oct 24 | Total (New Zealand and top five competitors) | Index (see appendix)

		New Zealand	Australia	Italy	Japan	France	Hawaii
Hygiene Factors	Excitement	98	91	93	104	120	110
	Safe destination	99	96	96	110	108	94
	Fun & enjoyment	94	101	119	102	106	102
	Family friendly	100	102	104	80	93	124
	Easy to travel around	91	92	112	126	121	95
	Affordable activities	103	94	98	112	124	66
	Affordable to fly to	92	95	106	121	150	76
Low Priority	Interesting cities	87	98	122	136	141	67

Actions for TNZ:

Drivers to dial up:
— Fun & enjoyment
— Easy to travel around
— Affordable to fly to

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

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The most common activities of interest include visiting historical sites, trying local cuisine and exploring scenic attractions; promoting these activities can help strengthen less competitive brand perceptions, including suitability for all seasons, iconic attractions and quality cuisine

Activities interested in doing in New Zealand (Top 20)
% Active Considerers | Oct 24

Legend: ■ Food & wine ■ Arts & Culture ■ Scenic attraction ■ Walking & Cycling ■ Wildlife ■ Scenic trips ■ Shopping

Activity	%
Visiting historical sites and heritage sites	87%
Trying local cuisine	86% ▼
Beaches & coasts	86% ▼
Lakes, rivers and waterfalls	85% ▼
Wildlife experiences	84%
Experiencing local towns	83%
Scenic train trip	83%
Mountains & alpine areas	83% ▼
Visiting national parks, nature reserves or native forests	82%
Scenic boat cruise	82%
Exploring main cities	81% ▼
Shopping for New Zealand made products, arts and crafts	80%
Marine reserves	79%
Bathing in hot pools / mud pools	78%
Geothermal sites, e.g. geysers, volcanos	78%
Māori cultural experiences	77%
Nature walks and hikes (up to 8 hours)	77%
Visiting museums & galleries	76% ▼
Glaciers	76%
Stargazing	76%

▲▼ *Significantly higher / lower than previous wave at 95%*

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The length of time required to fly to NZ remains the top concern for potential travellers, as well as the best time of year to enjoy their desired activities and safety; however weather concerns are reducing which is an encouraging sign in driving off-peak arrivals

Top ten knowledge gaps
% Active Considerers | Over time

		Oct-24	Apr-24
1	The length of time required to fly to New Zealand	46%	44%
2	What the best time of year is to do the activities I want to	38%	N/A
3	How safe it is from crime	33%	30%
4	How easy it is to travel around	32%	37%
5	What the weather is like	28% ▼	44%
6	How long it takes to travel between the main attractions	27%	29%
7	What / where the recommended things to see and do are	27%	23%
8	Driving on the left hand side of the road	27%	25%
9	The length of time needed to experience New Zealand properly	26%	31%
10	How welcoming the locals are	25%	32%

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

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Similar tactical communications would resonate with Dreamers and Discoverers

Top ten knowledge gaps, by funnel stage
% Active Considerers | Oct 24

What do ACs want to know more about before choosing New Zealand?	Dreaming	Discovering	Planning	Booking
1	The length of time required to fly to New Zealand	47%	41%		
2	What the best time of year is to do the activities I want to	43%	31%		
3	How safe it is from crime	36%	30%		
4	How easy it is to travel around	35%	30%		
5	What the weather is like	31%	26%	*Sample size too low*	
6	How long it takes to travel between the main attractions	25%	29%		
7	What / where the recommended things to see and do are	28%	26%		
8	Driving on the left-hand side of the road	27%	30% ▲		
9	The length of time needed to experience New Zealand properly	29%	23%		
10	How welcoming the locals are	28%	21%		

Ranks higher now than six months ago

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

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100% PURE NEW ZEALAND

The top knowledge gaps among ACs are consistent among off-peak considerers

Top ten knowledge gaps, by off-peak considerers
% Active Considerers | off-peak considerers | Oct 24

What do ACs want to know more about before choosing New Zealand?		All ACs	off-peak considerers[1]
1	The length of time required to fly to New Zealand	46%	47%
2	What the best time of year is to do the activities I want to	38%	37%
3	How safe it is from crime	33%	31%
4	How easy it is to travel around	32%	32%
5	What the weather is like	28%	24%
6	How long it takes to travel between the main attractions	27%	25%
7	What / where the recommended things to see and do are	27%	27%
8	Driving on the left hand side of the road	27%	28%
9	The length of time needed to experience New Zealand properly	26%	27%
10	How welcoming the locals are	25%	20% ▼

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

TNZ can help prompt ACs to book by providing advice on the best time of the year to travel, and working with trade partners to offer bundled package deals on flights and accommodation

Barriers to booking holiday to New Zealand
% Active Considerers | Oct 24

	Oct-24	Apr-24
	Caution: Low sample size for Oct-24	
Waiting for a deal on flights	43%	27%
I'm still deciding on what time of year I want to travel	43%	27%
Waiting for a good package deal on flights and accommodation	30%	27%
I have more research to do about New Zealand as a holiday destination	24%	24%
Waiting to accrue enough annual leave	24%	23%
Visa process is confusing / difficult	17%	8%
New Zealand is too far away / the flight is too long	13%	14%
I can't afford it at the moment	11%	16%
Don't have enough time to experience it properly	9%	15%
Don't have time to plan the trip at the moment	6%	17%
Waiting for the right life circumstances to travel	6%	19%
It's too expensive to travel to New Zealand	0%	13%

Sample size: Oct 24 n = 27 | Apr 24 n = 147
Question "What is stopping you from making a booking?"

Significantly higher / lower than previous period at 95%

Most Canadians are looking to spend between 5-21 days on holiday in New Zealand

Ideal minimum and maximum numbers of days spent on holiday in New Zealand
% Active Considerers | Oct 24

Legend:
- 35 days or more
- 29-35 days
- 22-28 days
- 15-21 days
- 8-14 days
- 5-7 days
- 1-4 days

Minimum number of days
- 7%
- 4%
- 1%
- 7%
- 26%
- 45%
- 10%

Maximum number of days
- 21%
- 9%
- 4%
- 27%
- 32%
- 5%
- 2%

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100% PURE NEW ZEALAND
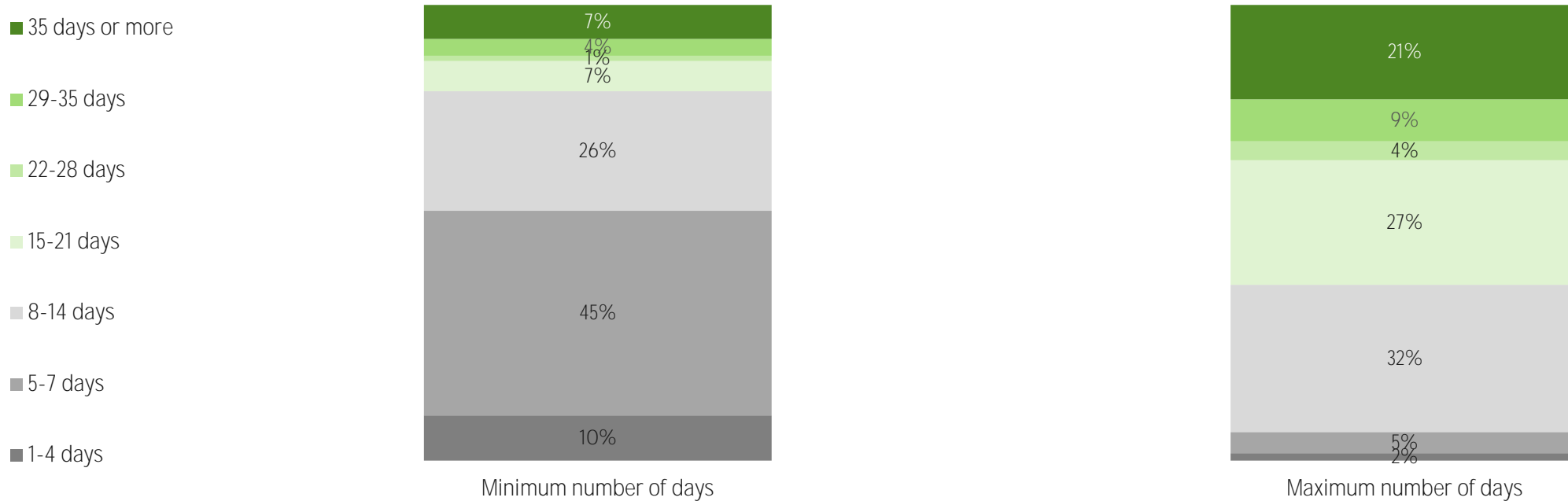
Promoting holiday packages between 14–19 days will cater to the broadest range of ACs, ensuring maximum appeal

Desired length of holiday in New Zealand (% for whom the number of days is neither too long or too short)
% Active Considerers | Oct 24

14 - 19 days meets the needs of the greatest number of ACs in that it is considered neither too short nor too long

15% 19% 25% 30% 35% 40% 43% 44% 43% 41% 38% 34% 30% 26% 22% 19% 16% 13% 11% 10% 8% 7% 6% 6% 5%

Average LOS is 12 days

2   4   6   8   10   12   14   16   18   20   22   24   26   28   30   32   34   36   38   40   42   44   46   48   50

Number of days

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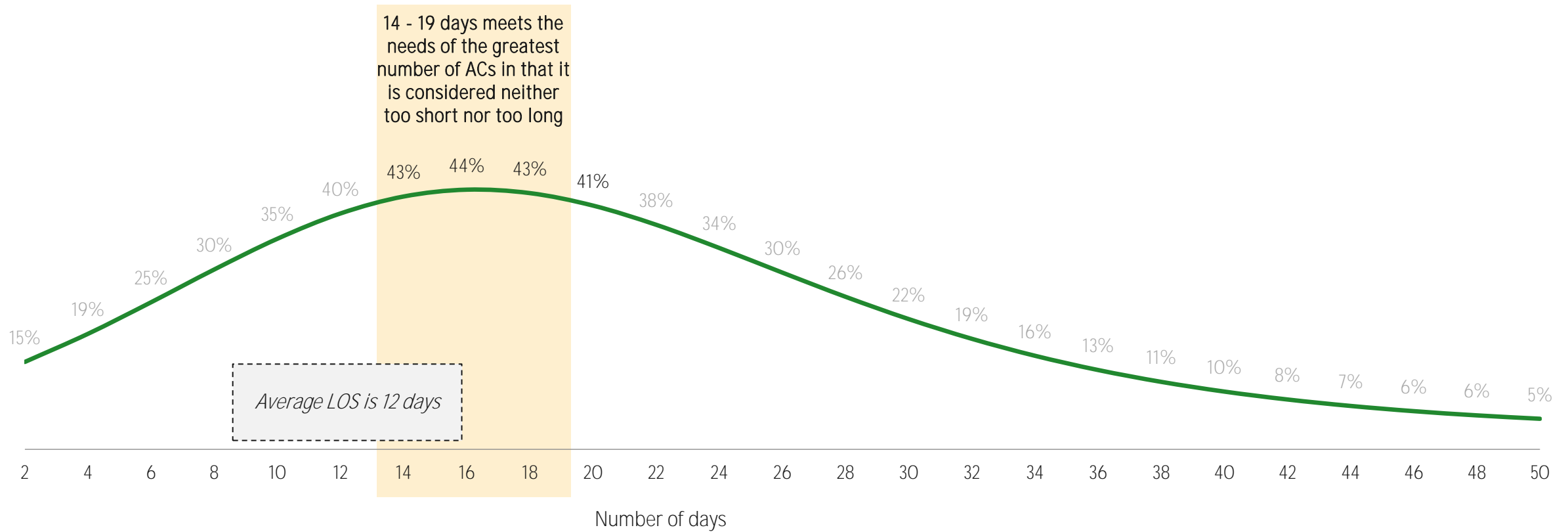
Canadian ACs are more inclined to travel to New Zealand in smaller groups, with 34% likely to travel with a partner

Likely travel party for New Zealand holiday
% Active Considerers | Oct 24

Travel party	%
Partner / spouse	34%
A small group of friends (1-5 others)	16%
Travel alone	15%
Family - with dependent children under 18yrs (school aged, living at home)	11%
Family - but no children under 18yrs (i.e. with parents, siblings)	10%
Travel alone but I'd meet friends / family there	5%
Mix of friends and family with dependent children (school aged, living at home)	4%
A large group of friends (6+ others)	2%
Mix of friends and family with non-dependent children	2%
Strangers on an organised group tour	1%

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Sample size: Oct 24 n = 300
Q "Who are you most likely to travel with on your trip to New Zealand?"

100% PURE NEW ZEALAND

86

Almost half of the AC pool intend to visit New Zealand for a holiday only, while 33% would look to visit family and friends while on holiday in New Zealand

Additional intentions when on holiday in New Zealand
% Active Considerers | Oct 24

See family and friends — 33%

Work — 9%

Study — 8%

Other — 5%

Don't know — 2%

None of the above — 49% → *Represents ACs who are only considering travelling to New Zealand for a holiday*

Sample size: Oct 24 n = 300
Q "When considering travelling to New Zealand for a holiday, do you also intend to.."

7 | Appendix
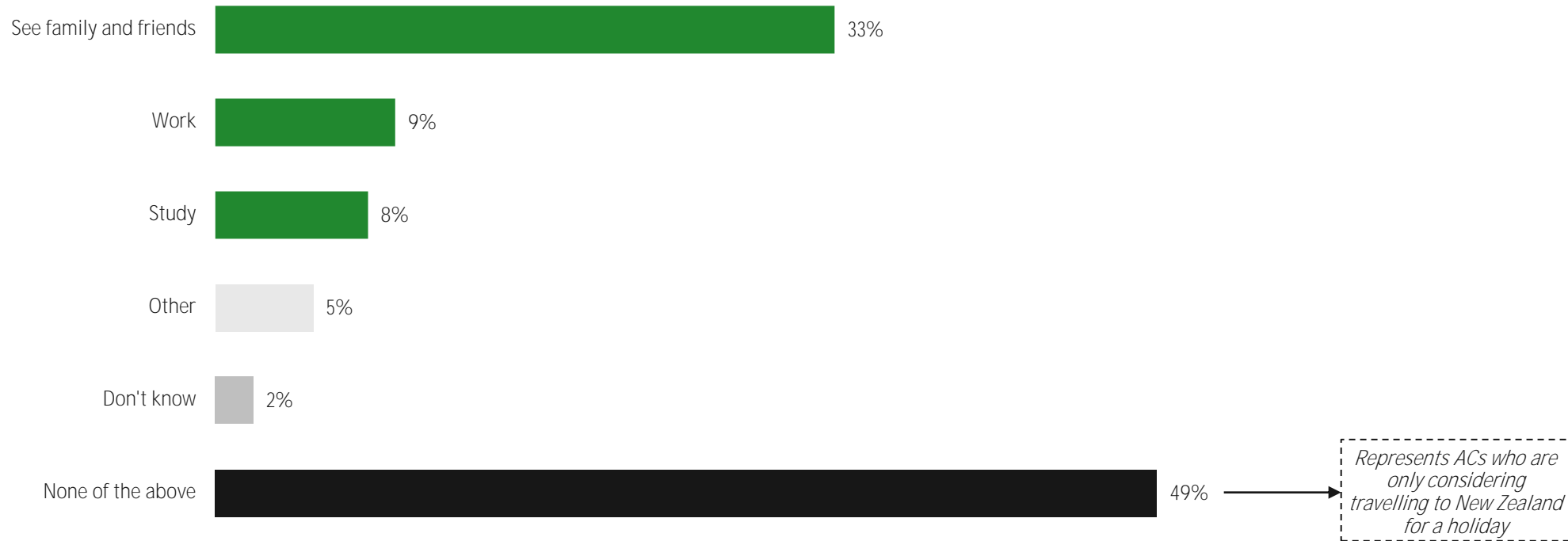
Activities interested in doing in New Zealand (full list)
AC Monitor | Current 5M | Total Active Considerers

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

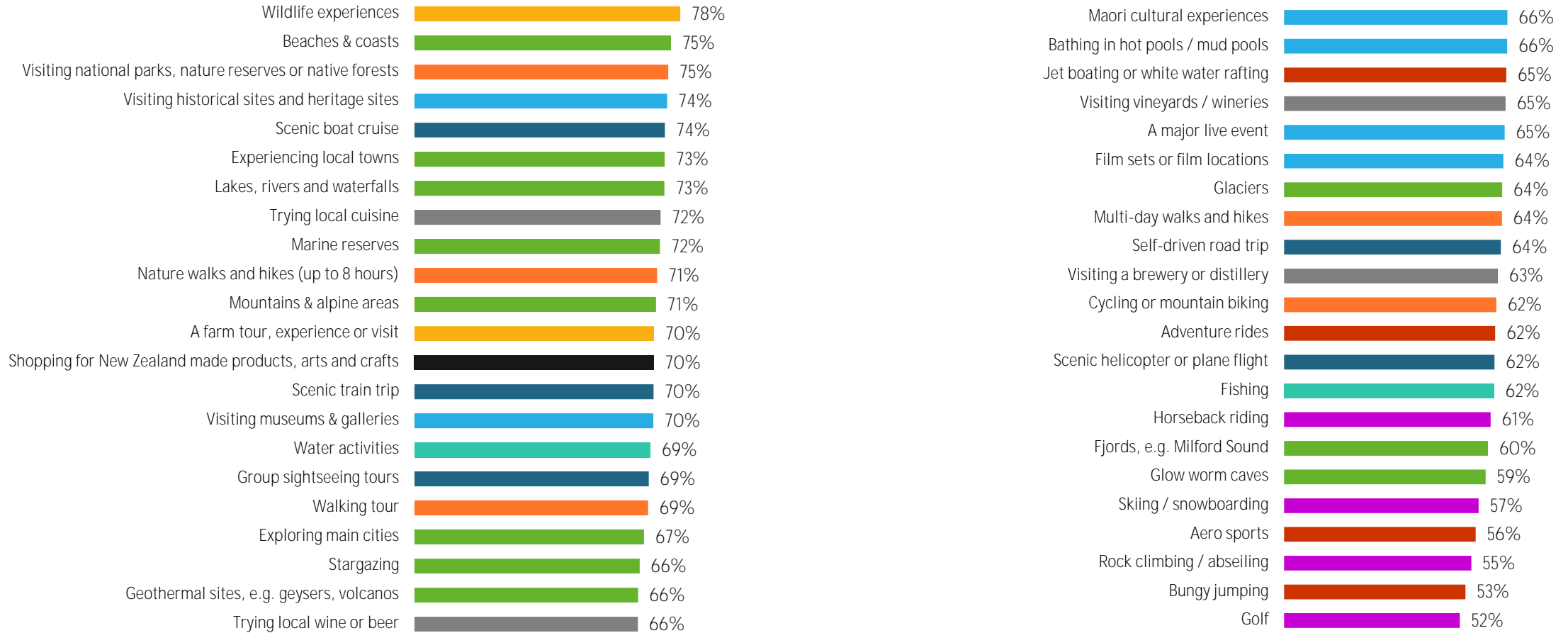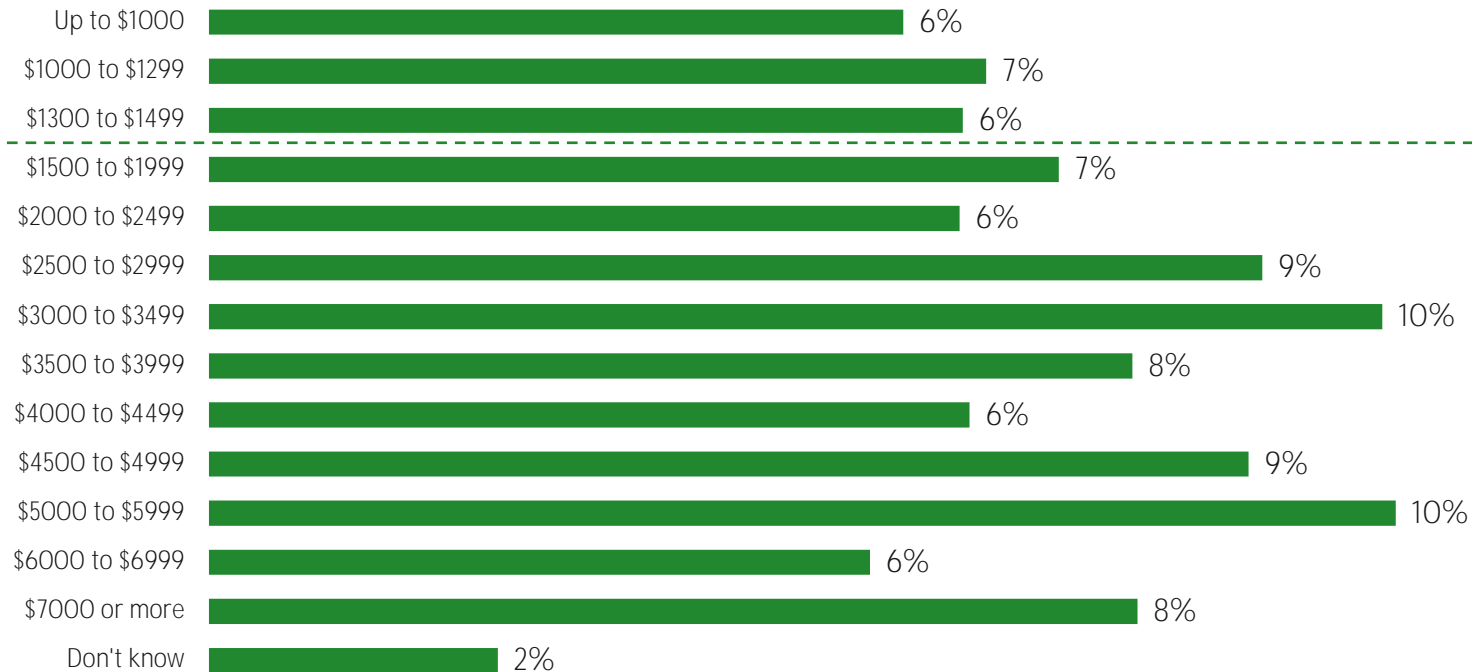| Activity	%
Wildlife experiences	78%
Beaches & coasts	75%
Visiting national parks, nature reserves or native forests	75%
Visiting historical sites and heritage sites	74%
Scenic boat cruise	74%
Experiencing local towns	73%
Lakes, rivers and waterfalls	73%
Trying local cuisine	72%
Marine reserves	72%
Nature walks and hikes (up to 8 hours)	71%
Mountains & alpine areas	71%
A farm tour, experience or visit	70%
Shopping for New Zealand made products, arts and crafts	70%
Scenic train trip	70%
Visiting museums & galleries	70%
Water activities	69%
Group sightseeing tours	69%
Walking tour	69%
Exploring main cities	67%
Stargazing	66%
Geothermal sites, e.g. geysers, volcanos	66%
Trying local wine or beer	66%

Activity	%
Maori cultural experiences	66%
Bathing in hot pools / mud pools	66%
Jet boating or white water rafting	65%
Visiting vineyards / wineries	65%
A major live event	65%
Film sets or film locations	64%
Glaciers	64%
Multi-day walks and hikes	64%
Self-driven road trip	64%
Visiting a brewery or distillery	63%
Cycling or mountain biking	62%
Adventure rides	62%
Scenic helicopter or plane flight	62%
Fishing	62%
Horseback riding	61%
Fjords, e.g. Milford Sound	60%
Glow worm caves	59%
Skiing / snowboarding	57%
Aero sports	56%
Rock climbing / abseiling	55%
Bungy jumping	53%
Golf	52%

Willingness to spend on holiday in New Zealand

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

Category	Percentage
Up to $1000	6%
$1000 to $1299	7%
$1300 to $1499	6%
$1500 to $1999	7%
$2000 to $2499	6%
$2500 to $2999	9%
$3000 to $3499	10%
$3500 to $3999	8%
$4000 to $4499	6%
$4500 to $4999	9%
$5000 to $5999	10%
$6000 to $6999	6%
$7000 or more	8%
Don't know	2%

1. Sample size: n = 1056
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"

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100% PURE NEW ZEALAND

93

Willingness to spend on holiday in New Zealand among ACs

AC Monitor | Current 5M | Total Active Considerers
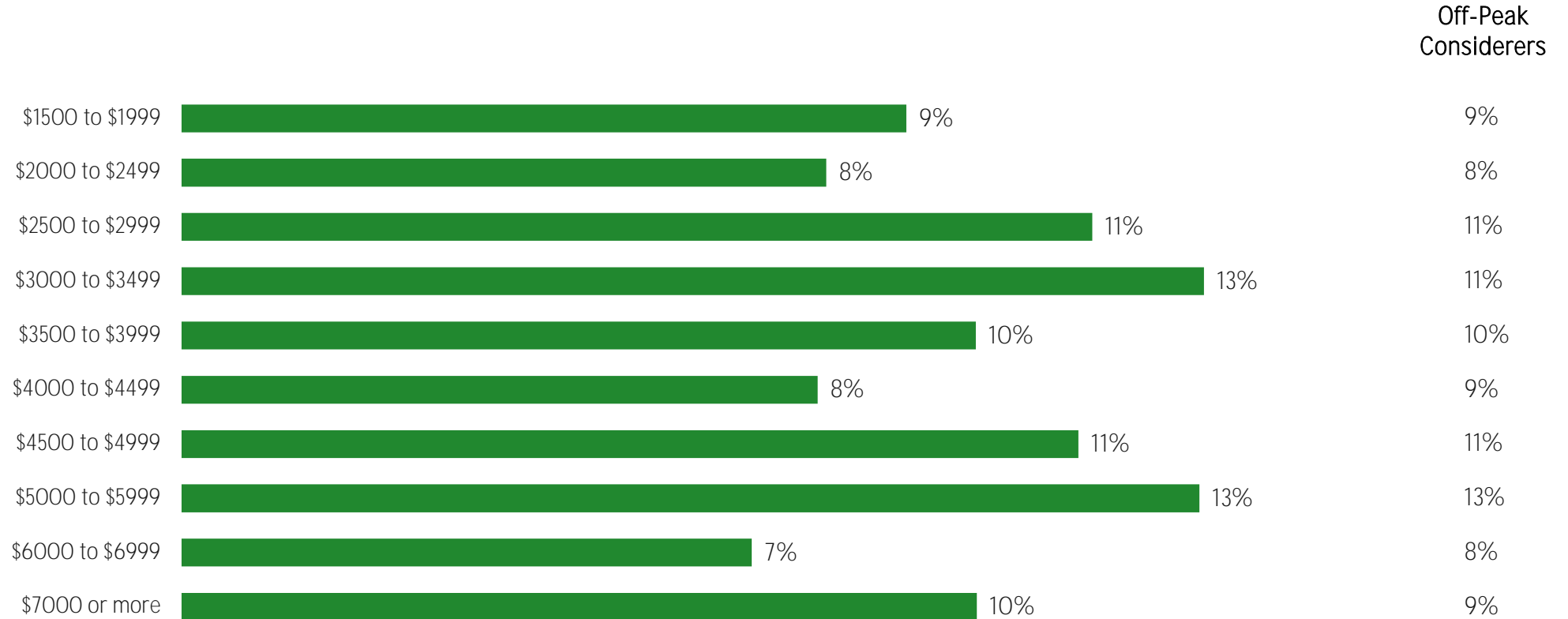
		Off-Peak Considerers
$1500 to $1999	9%	9%
$2000 to $2499	8%	8%
$2500 to $2999	11%	11%
$3000 to $3499	13%	11%
$3500 to $3999	10%	10%
$4000 to $4499	8%	9%
$4500 to $4999	11%	11%
$5000 to $5999	13%	13%
$6000 to $6999	7%	8%
$7000 or more	10%	9%

▲▼ *Significantly higher / lower than non-considerers of Off-Peak*

1. Sample size: Total ACs n = 750 | off-peak considerers n = 487
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"

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100% PURE NEW ZEALAND

Compared to those who do not find New Zealand appealing, those who do skew male, towards those aged 18-39, and from the West and Northeast regions

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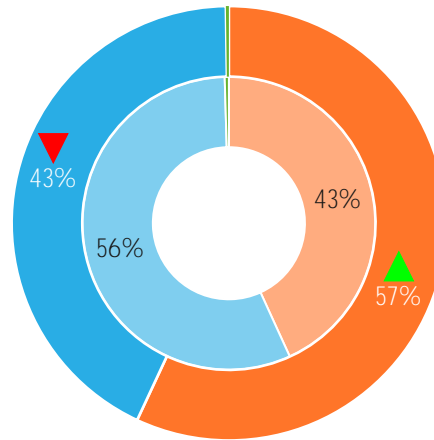AC Monitor | Current 5M | Those who find New Zealand highly appealing vs. not

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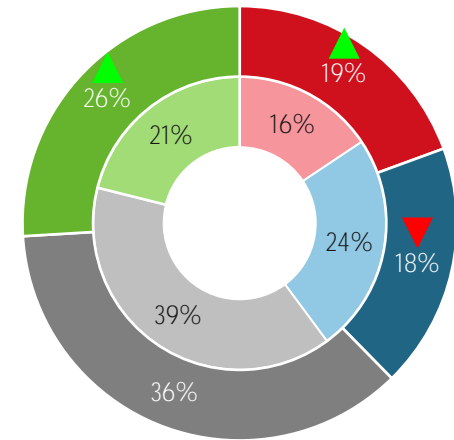
By age segment

28%
22%
17%
22%
19%
19%
22%
16%
21%
14%

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

By gender

43%
57%
56%
43%

■ Male
■ Female
■ Gender diverse

By region

19%
16%
18%
24%
36%
39%
26%
21%

■ Northeast
■ Midwest
■ South
■ West

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

1. Sample size: Those who find New Zealand highly appealing n = 1914 | Those who do not find New Zealand highly appealing n = 2080

100% PURE NEW ZEALAND
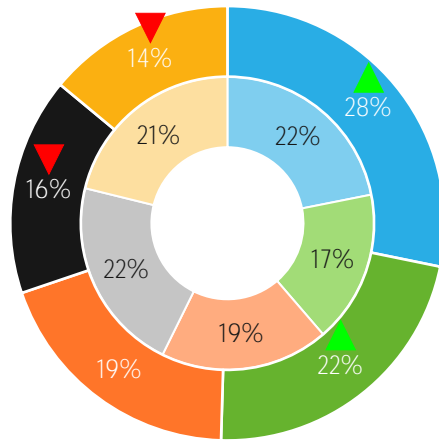
Amongst those who find New Zealand highly appealing, people who are serious considerers of visiting (vs. not) are significantly more like to be male and those aged 18-29
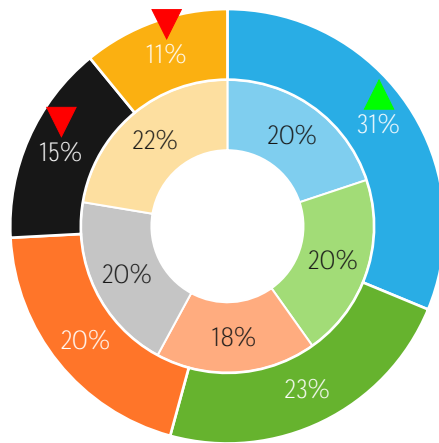
Profile of those who would seriously consider visiting New Zealand
AC Monitor | Current 5M | Those who find New Zealand highly appealing

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

By age segment

- 20%
- 31% ▲
- 20%
- 22%
- 18%
- 23%
- 20%
- 20%
- 15% ▼
- 11% ▼

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

By gender

- 48%
- 60% ▲
- 51%
- 40% ▼

■ Male
■ Female
■ Gender diverse

By region

- 21%
- 16%
- 16% ▼
- 24%
- 37%
- 36%
- 23%
- 27%

■ Northeast
■ Midwest
■ South
■ West

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

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1. Sample size: Those who would seriously consider visiting New Zealand n = 1266 | Those who would not seriously consider visiting New Zealand n = 648

100% PURE NEW ZEALAND
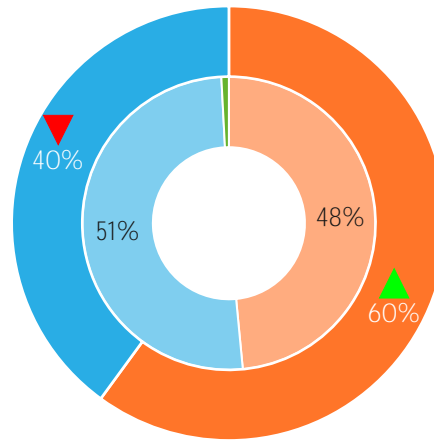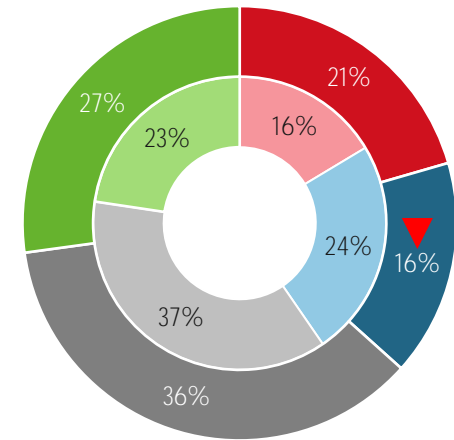
A quarter of total ACs have a household income of between 80k but under 100k

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

Income	%
Less than USD $20,000	3%
USD $20,000 to $39,999	7%
USD $40,000 to $59,999	16%
USD $60,000 to $79,999	15%
USD $80,000 to $99,999	25%
USD $100,000 to $124,999	22%
USD $125,000 to $149,999	8%
USD $150,000 or more	3%
Prefer not to say	1%

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

100% PURE NEW ZEALAND
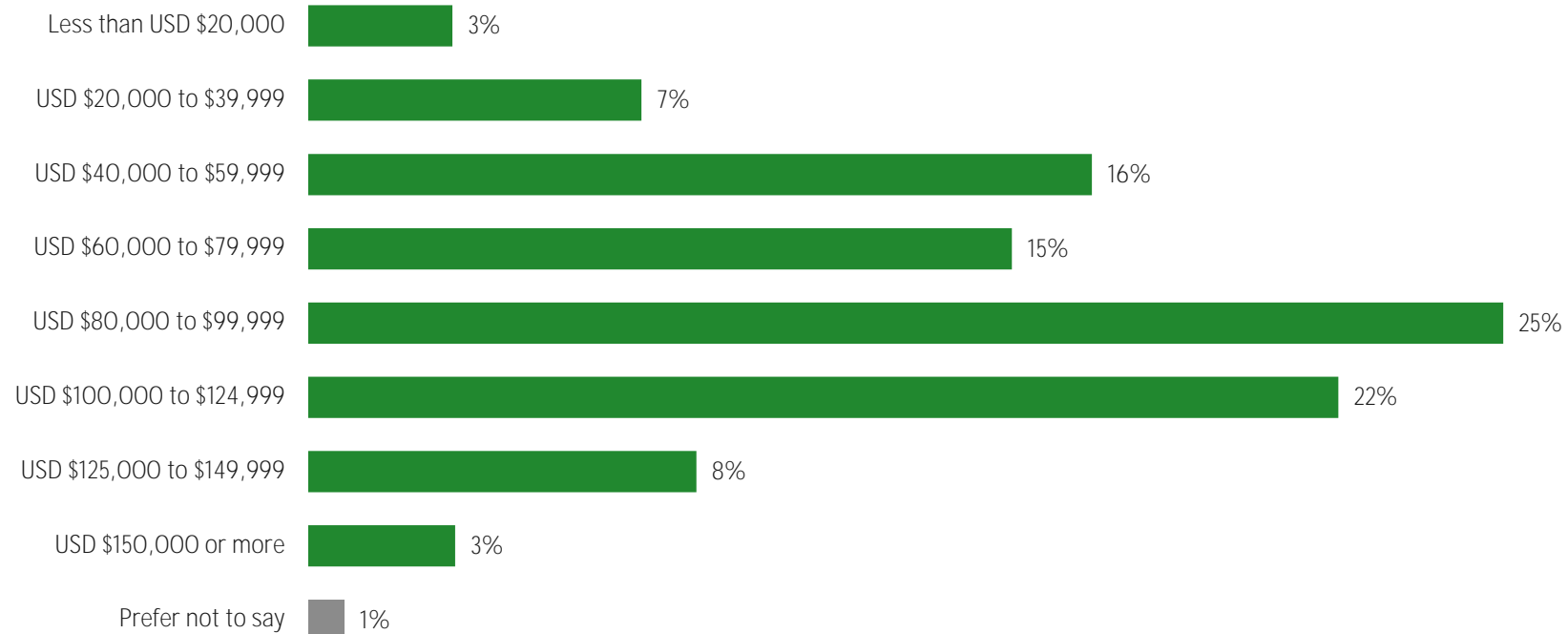
USA Market Sizing

Nov 24 | Million people
Market size, based on the AC incidence rate for the five months to November 2024
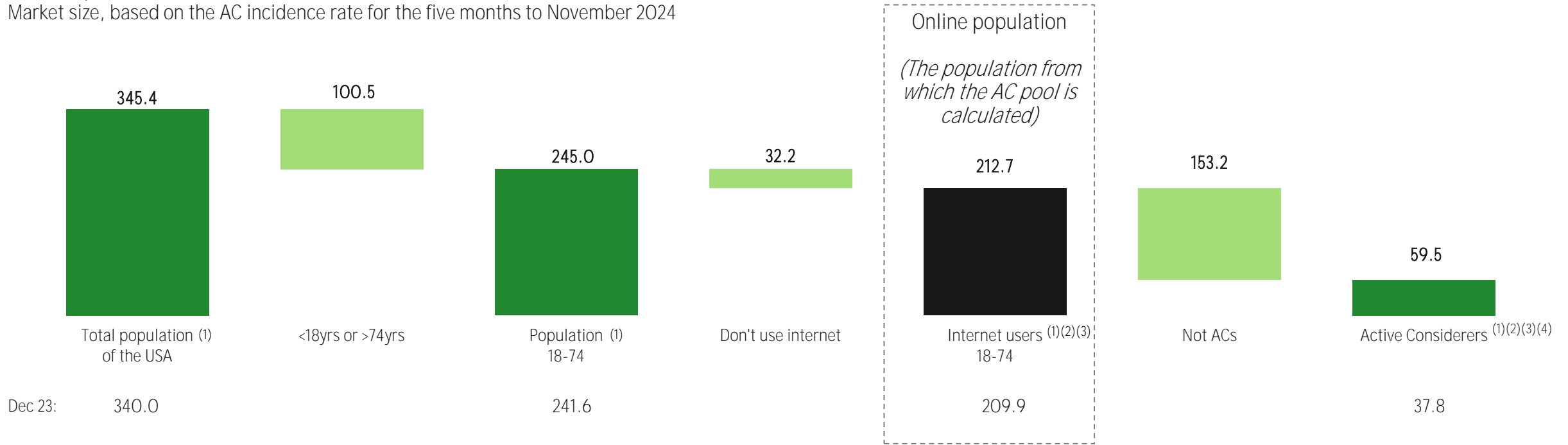
Online population

(The population from which the AC pool is calculated)

| | 345.4 | 100.5 | 245.0 | 32.2 | 212.7 | 153.2 | 59.5 |

Total population [1] of the USA — 345.4
<18yrs or >74yrs — 100.5
Population [1] 18-74 — 245.0
Don't use internet — 32.2
Internet users [1][2][3] 18-74 — 212.7
Not ACs — 153.2
Active Considerers [1][2][3][4] — 59.5

Dec 23: 340.0   241.6   209.9   37.8

Top concerns around visiting New Zealand are logistical – ACs need reassurances around the time needed to get to and ease of travelling around New Zealand, and what the best time of year to travel is

Knowledge gaps (full list)
% Active Considerers | Oct 24

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

The length of time required to fly to New Zealand	46%
What the best time of year is to do the activities I want to	38%
How safe it is from crime	33%
How easy it is to travel around	32%
What the weather is like	28%
How long it takes to travel between the main attractions	27%
What / where the recommended things to see and do are	27%
Driving on the left hand side of the road	27%
The length of time needed to experience New Zealand properly	26%
How welcoming the locals are	25%
How safe it is to participate in adventure activities	24%
Where I should get information about organising a holiday	24%

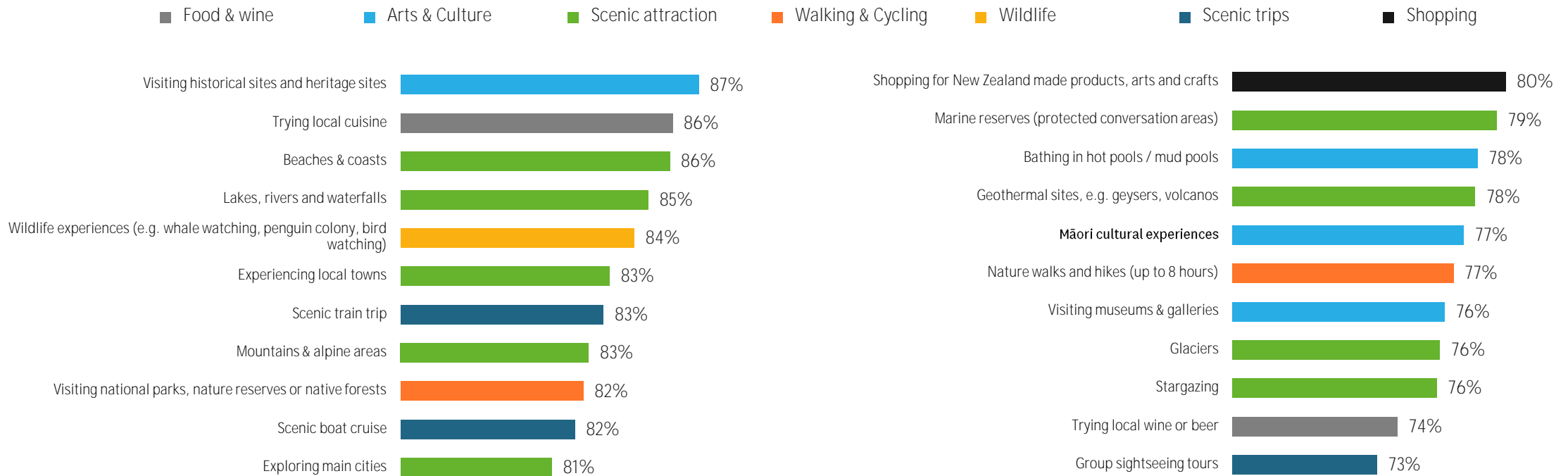|	
How physically fit I'd need to be	24%
The quality and variety of food and beverage options	22%
Whether there is a broad enough variety of things to see and do	21%
How sophisticated / world-class the main cities are	17%
Whether New Zealand is a place that is accepting of people from diverse backgrounds and lifestyles	17%
What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	17%
Negative environmental impact of air travel	15%
What / where the main cities are	14%
How well suited it is to people my age	14%
Whether there are sustainable tourism practices	12%
Other	1%
Don't know	1%

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The most common activities of interest include visiting historical sites, trying local cuisine and exploring scenic attractions; promoting these activities can help strengthen less competitive brand perceptions, including suitability for all seasons, iconic attractions and quality cuisine

Activities interested in doing in New Zealand (full list)
% Active Considerers | Oct 24

Legend: ■ Food & wine ■ Arts & Culture ■ Scenic attraction ■ Walking & Cycling ■ Wildlife ■ Scenic trips ■ Shopping

Activity	%
Visiting historical sites and heritage sites	87%
Trying local cuisine	86%
Beaches & coasts	86%
Lakes, rivers and waterfalls	85%
Wildlife experiences (e.g. whale watching, penguin colony, bird watching)	84%
Experiencing local towns	83%
Scenic train trip	83%
Mountains & alpine areas	83%
Visiting national parks, nature reserves or native forests	82%
Scenic boat cruise	82%
Exploring main cities	81%

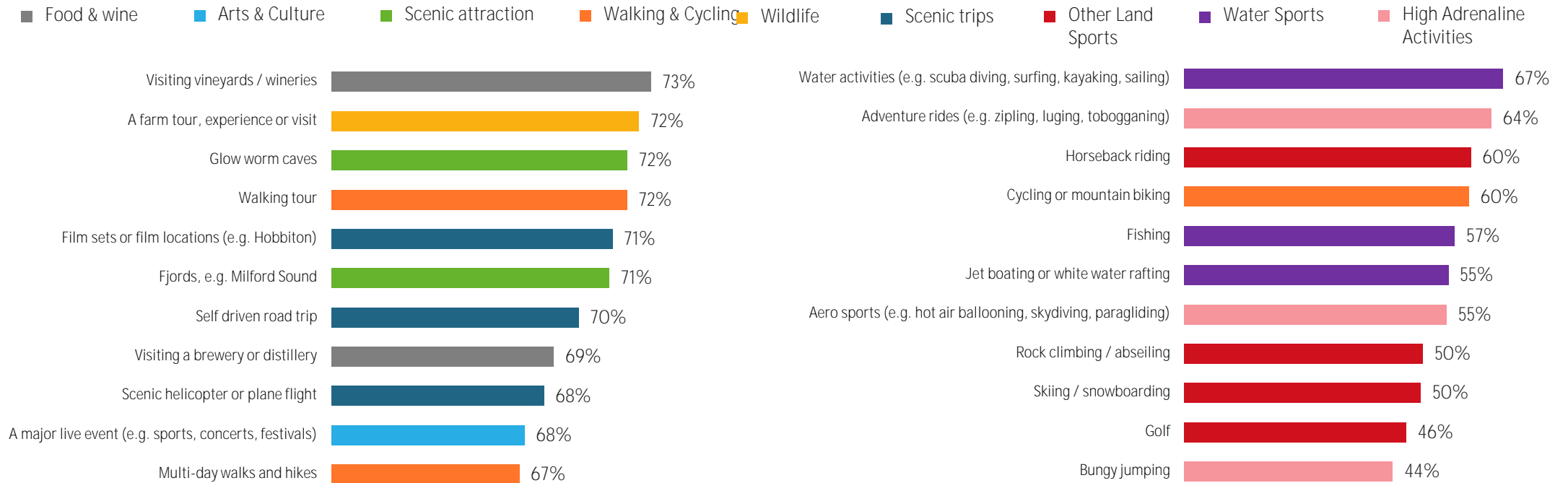| Activity	%
Shopping for New Zealand made products, arts and crafts	80%
Marine reserves (protected conversation areas)	79%
Bathing in hot pools / mud pools	78%
Geothermal sites, e.g. geysers, volcanos	78%
Māori cultural experiences	77%
Nature walks and hikes (up to 8 hours)	77%
Visiting museums & galleries	76%
Glaciers	76%
Stargazing	76%
Trying local wine or beer	74%
Group sightseeing tours	73%

General sporting and high adrenaline activities generate less interest among ACs

Activities interested in doing in New Zealand (full list continued)
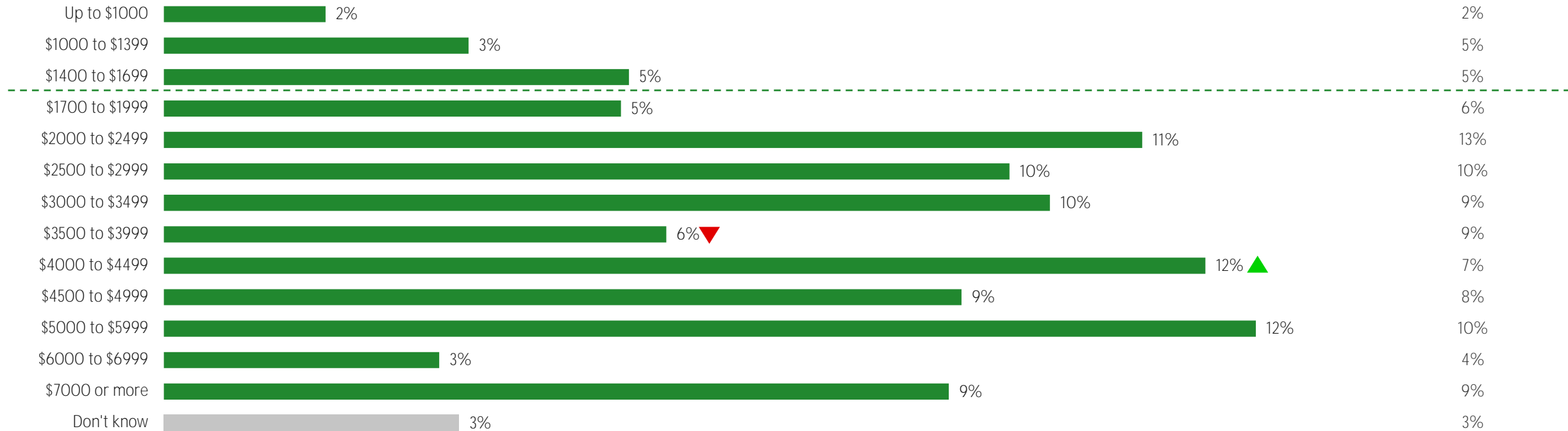% Active Considerers | Oct 24

Legend: ■ Food & wine ■ Arts & Culture ■ Scenic attraction ■ Walking & Cycling ■ Wildlife ■ Scenic trips ■ Other Land Sports ■ Water Sports ■ High Adrenaline Activities

Activity	%
Visiting vineyards / wineries	73%
A farm tour, experience or visit	72%
Glow worm caves	72%
Walking tour	72%
Film sets or film locations (e.g. Hobbiton)	71%
Fjords, e.g. Milford Sound	71%
Self driven road trip	70%
Visiting a brewery or distillery	69%
Scenic helicopter or plane flight	68%
A major live event (e.g. sports, concerts, festivals)	68%
Multi-day walks and hikes	67%

Activity	%
Water activities (e.g. scuba diving, surfing, kayaking, sailing)	67%
Adventure rides (e.g. zipling, luging, tobogganing)	64%
Horseback riding	60%
Cycling or mountain biking	60%
Fishing	57%
Jet boating or white water rafting	55%
Aero sports (e.g. hot air ballooning, skydiving, paragliding)	55%
Rock climbing / abseiling	50%
Skiing / snowboarding	50%
Golf	46%
Bungy jumping	44%

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Amongst Canadians who agree that New Zealand is a preferred holiday destination, only 10% do not meet the current spend threshold of $1,700 CAD

Anticipated spend on holiday in New Zealand
% Those who agree NZ is a preferred holiday destination | Oct 24

Apr-24

	Oct 24	Apr-24
Up to $1000	2%	2%
$1000 to $1399	3%	5%
$1400 to $1699	5%	5%
$1700 to $1999	5%	6%
$2000 to $2499	11%	13%
$2500 to $2999	10%	10%
$3000 to $3499	10%	9%
$3500 to $3999	6% ▼	9%
$4000 to $4499	12% ▲	7%
$4500 to $4999	9%	8%
$5000 to $5999	12%	10%
$6000 to $6999	3%	4%
$7000 or more	9%	9%
Don't know	3%	3%

▲▼ *Significantly higher / lower than previous wave at 95%*

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100% PURE NEW ZEALAND

Compared to those who do not find New Zealand appealing, those who do are more likely to be aged 30-39 years and residing in Ontario

Profile of those who find New Zealand appealing
Those who find New Zealand appealing vs. not | Oct 24

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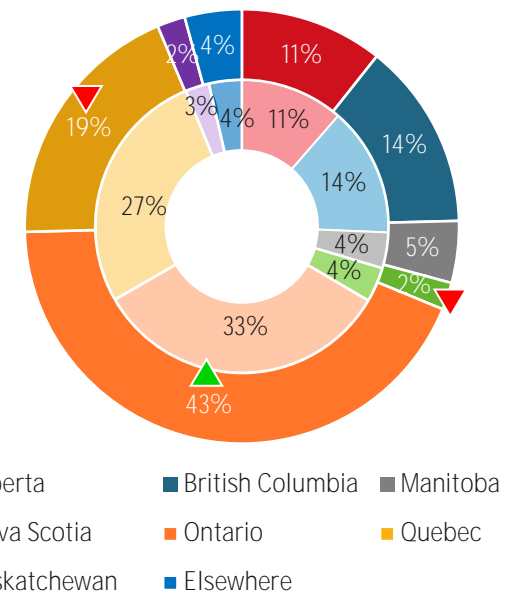Inner ring : Those who do not find New Zealand appealing

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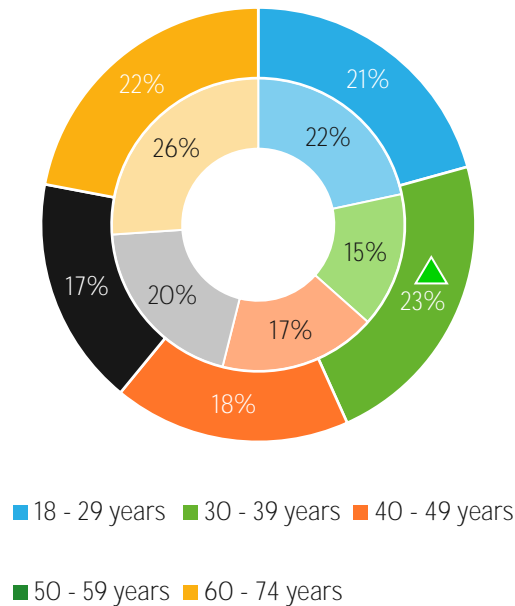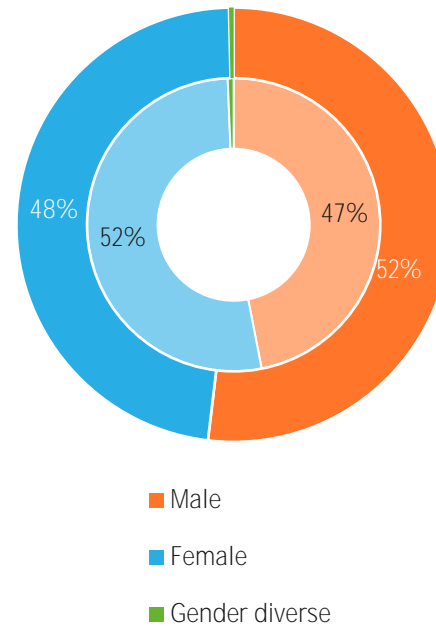
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

Outer: 21%, 23% ▲, 18%, 17%, 22%
Inner: 22%, 15%, 17%, 20%, 26%

By gender

- Male
- Female
- Gender diverse

Outer: 48% / 47%
Inner: 52% / 52%

By region

- Alberta
- British Columbia
- Manitoba
- Nova Scotia
- Ontario
- Quebec
- Saskatchewan
- Elsewhere

Outer ring: 11%, 14%, 5%, 2% ▼, 43% ▲, 19% ▼, 2%, 4%
Inner ring: 11%, 14%, 4%, 4%, 33%, 27%, 3%, 4%

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

Sample sizes: Those who find New Zealand appealing n = 740 | Those who do not find New Zealand appealing n = 612

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100% PURE NEW ZEALAND

103

Compared to non-considerers, the profile of serious considerers in Canada is skewed more towards males, those aged between 18-29 years and those residing in Ontario

Profile of those who would seriously consider visiting New Zealand
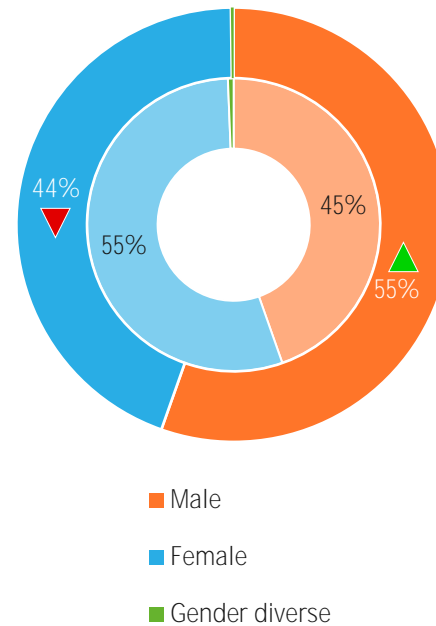Those who would seriously consider vs. not | Oct 24

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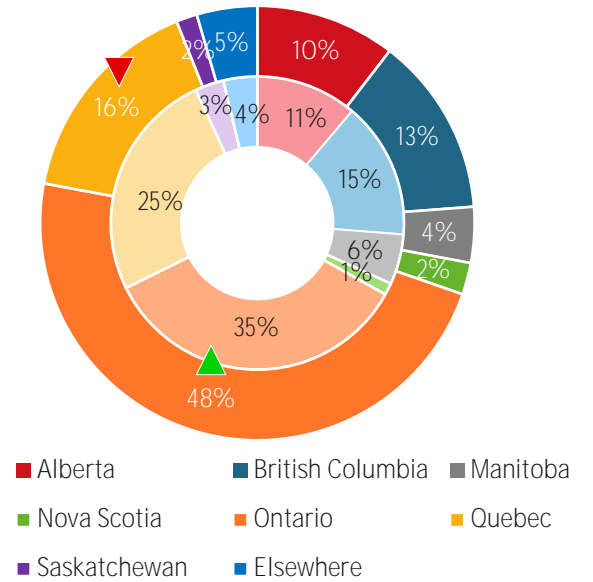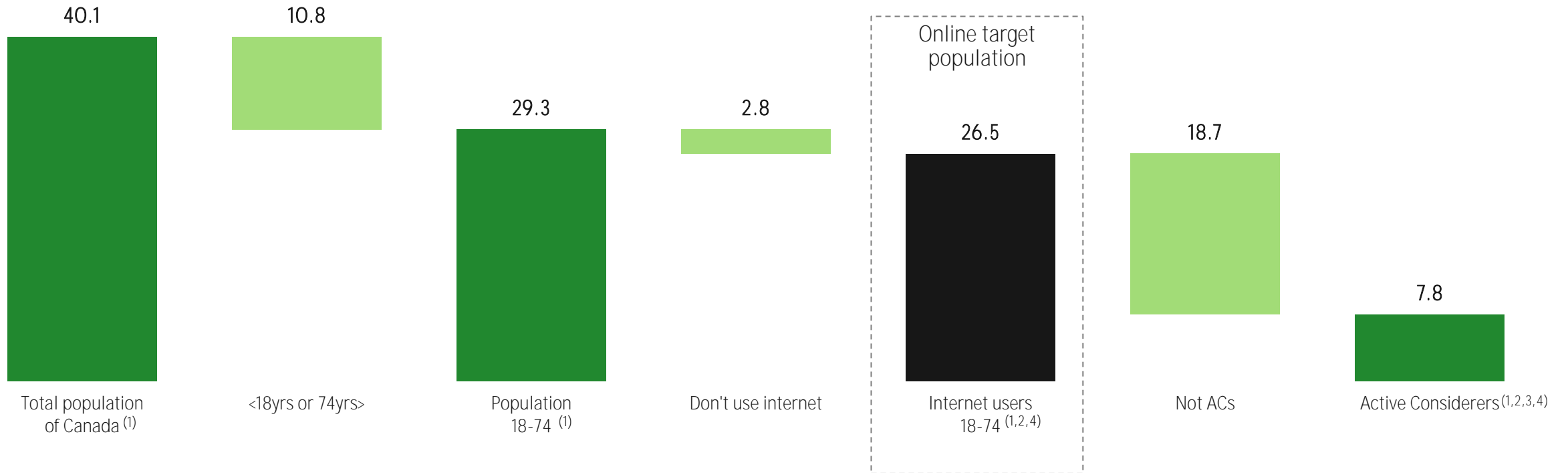Inner ring : Those who would not seriously consider

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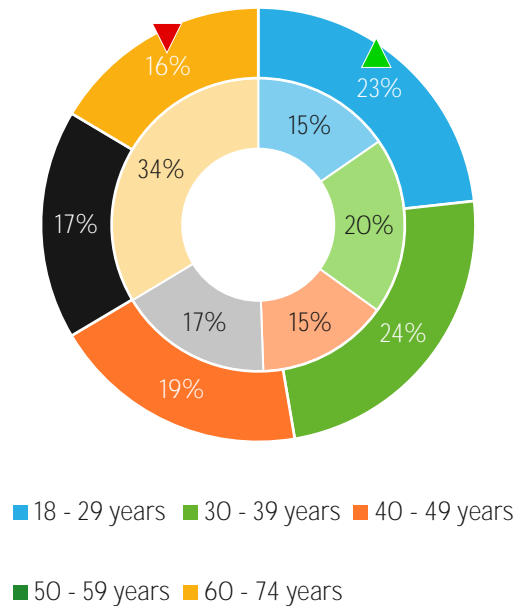
- ■ 18 - 29 years
- ■ 30 - 39 years
- ■ 40 - 49 years
- ■ 50 - 59 years
- ■ 60 - 74 years

By gender

- ■ Male
- ■ Female
- ■ Gender diverse

By region

- ■ Alberta
- ■ British Columbia
- ■ Manitoba
- ■ Nova Scotia
- ■ Ontario
- ■ Quebec
- ■ Saskatchewan
- ■ Elsewhere

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

Sample sizes: Those who would seriously consider visiting New Zealand n = 493 | Those who would not seriously consider visiting New Zealand n = 247

104

Canada Market Sizing

Market size, based on the AC incidence rate for Oct 24
Oct24 | Million people

				Online target population		
40.1	10.8	29.3	2.8	26.5	18.7	7.8
Total population of Canada [1]	<18yrs or 74yrs>	Population 18-74 [1]	Don't use internet	Internet users 18-74 [1,2,4]	Not ACs	Active Considerers [1,2,3,4]

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 …

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

Yes

No

Dream

Which of the following best describes the stage you are at with your research and planning for New Zealand holiday?

I have been exploring possibilities, but I have not started planning the details of my trip

I have done enough research and started actively planning the details of my trip

Discover

Have you reached a stage where you are ready to make firm bookings to travel to New Zealand for a holiday?

Yes, I'm ready to make firm bookings

I've already made bookings

No

Book

Book

Plan

KANTAR

100% PURE NEW ZEALAND