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Canada Active Considerer Market

Full report
Tourism New Zealand

April 2022



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Objective

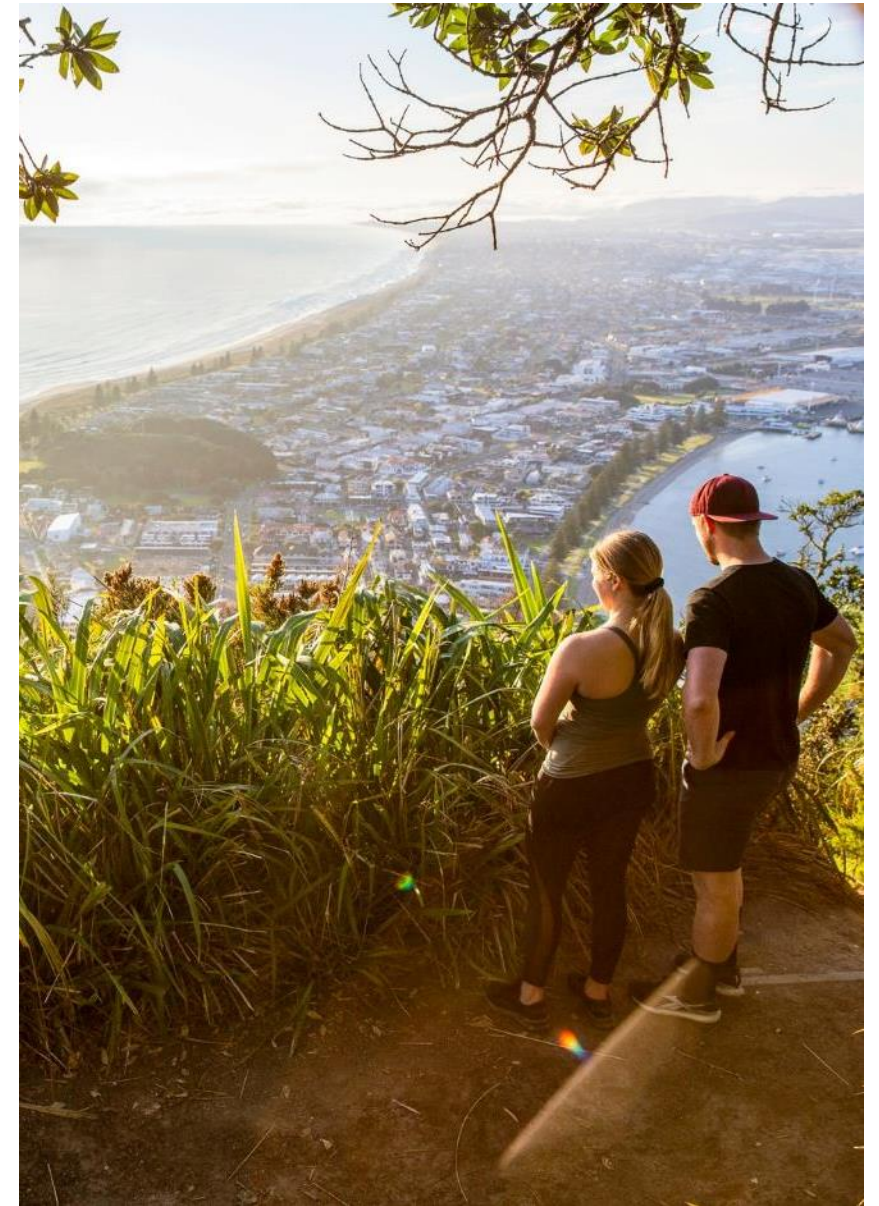
Provide a fact-based understanding of the size and profile of the Active Considerer (AC) audience in Canada and their sentiment towards travelling to New Zealand post-pandemic

BACKGROUND

- With many international border restrictions lifting, New Zealand is reopening its borders in stages for international travellers. From May 2022, vaccinated travellers from around 60 visa-wavier countries, including Canada, are able to enter New Zealand
- This is the first evaluation on the Canada market. With Covid-19 reshaping the travel landscape, Tourism New Zealand (TNZ) sought to understand the Canadian market and undertook this evaluation to determine any opportunity

RESEARCH APPROACH

- In order to answer the objective, a 10 minute online survey was conducted among 500 Canadian Active Considerers of New Zealand
- Fieldwork was in market 11– 25 April 2022



Key insights (page 1 of 3)



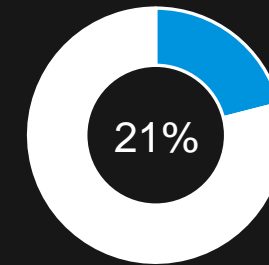
Insight 1

The Canadian has a relatively large pool of 5.5m Active Considerers (ACs) for New Zealand despite New Zealand border closures.

Compared to New Zealand's top six markets, Canada demonstrates a good level of appeal for New Zealand (53%) and a strong incidence (21%)

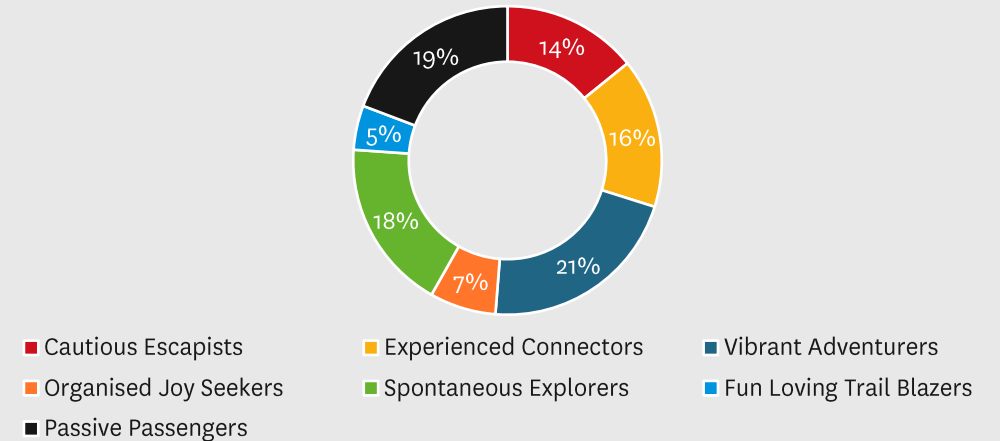
- Our global priority mindsets – *Experienced Connectors* and *Vibrant Adventurers* – make up close to half of all Active Considerers in Canada

Incidence of Active Considerers




Q4 FY22

Profile of ACs by mindset




Key insights (page 2 of 3)







Key brand associations to build:




Landscapes and scenery




Range of adventure / experiences




Key brand strengths to leverage:




Clean & unpolluted



A place you can escape the troubles of the world



Has amazing wildlife experiences



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

Australia	39%
Hawaii	35%
Italy	28%
Japan	25%
Greece	25%

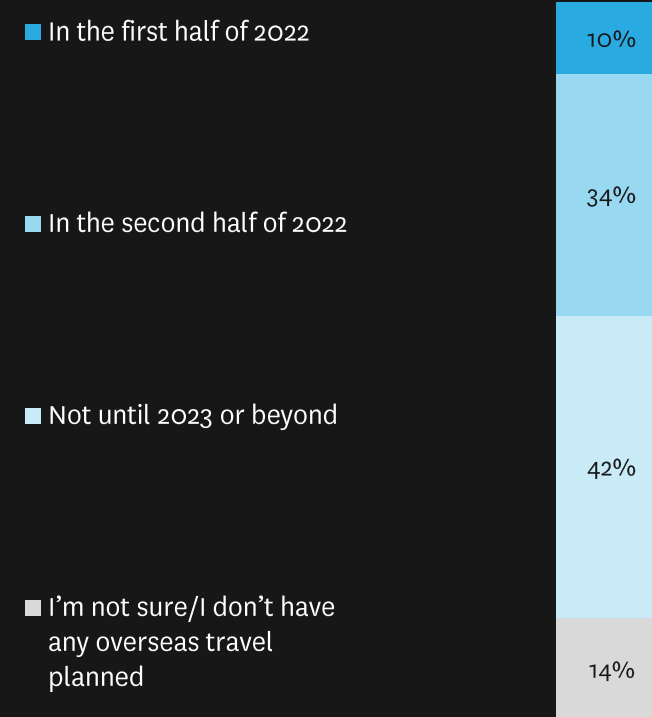
Key insights (page 3 of 3)



Insight 3

- Compared to pre-Covid there is greater interest in travelling more often and visiting multiple stops as part of an overseas trip
- 46% ACs are keen to travel to New Zealand within 6 months of borders opening
- Now that borders have opened (post fieldwork) Canadian ACs are much more willing to book a trip to New Zealand
- To boost visitor numbers, communications also need to promote flexible refund policies and deals / promotions to reduce barriers to travel

Travel intention timing for next international holiday



1

The size and profile of the AC market

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Active Considerer journey funnel – Canada

Total population **38.2m**

Online population,
18-74 years of age **26.8m**

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

Online population, 18-74 years of age
53%

14.2m

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

60%

8.6m

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

83%

7.1m

Willing to spend at least C\$1,700 per person on a holiday to New Zealand⁽¹⁾

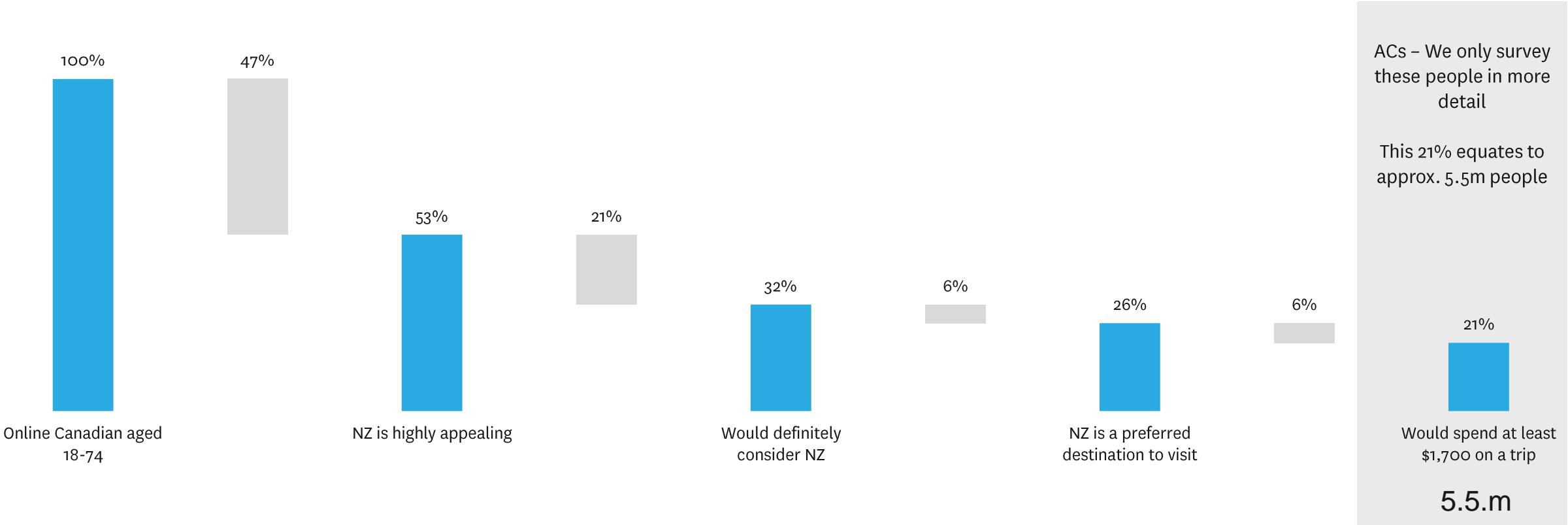
78%

5.5m

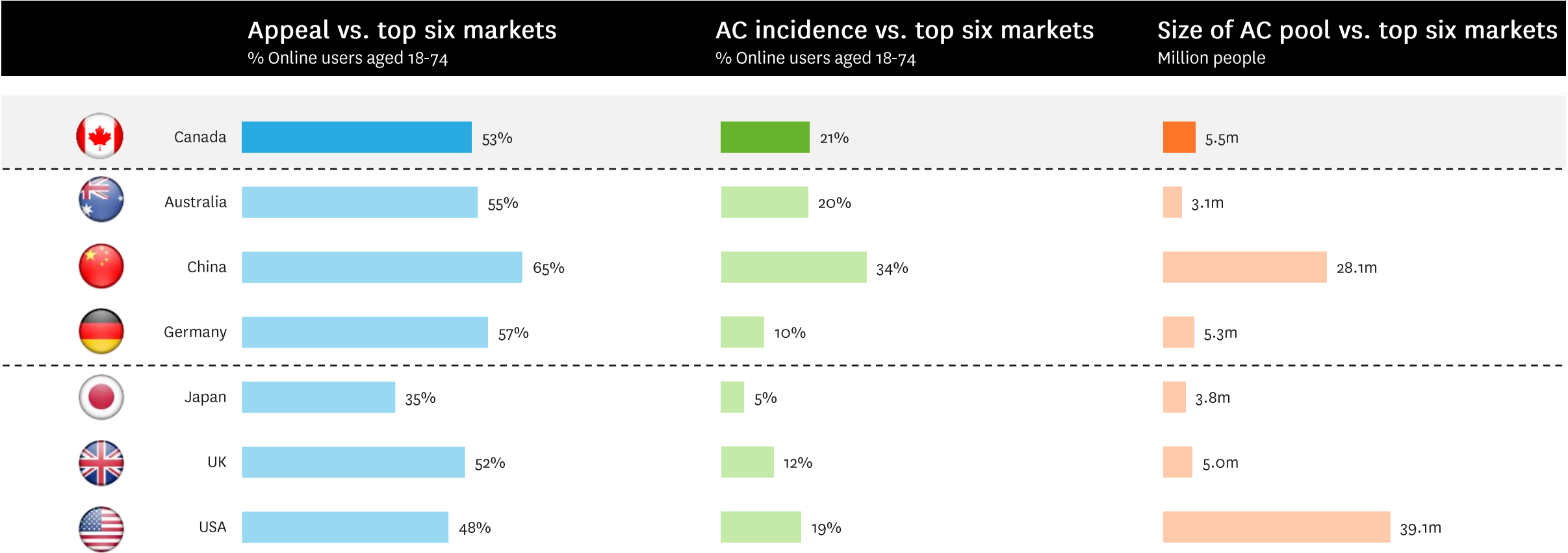
The AC incidence in Canada is 21%, equating to approximately 5.5 million people

Qualifying criteria for defining ACs

% Online users aged 18-74 | Apr 22



The size of the Canada AC pool is comparable to other key markets



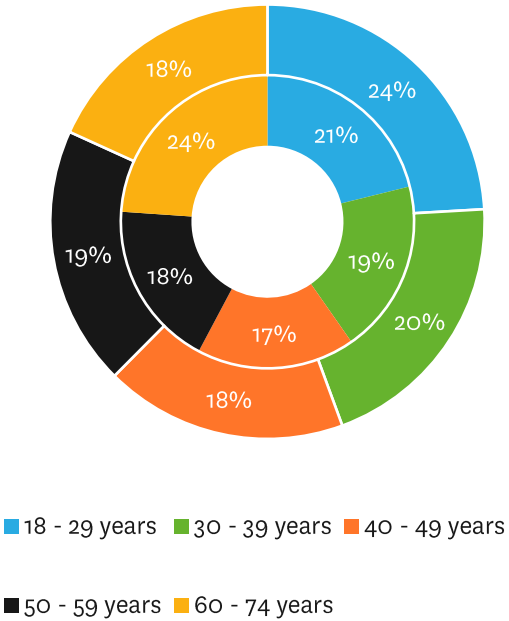
Notes:
1. Sample sizes: Total Acs n = 4,129
2. Source for top 6 markets: AC Monitor | 6MRA | Online users aged 18-74 | Oct21-Mar22
Australia n = 4,983 | China n = 2,921 | Germany n = 11,308 | Japan n = 20,878 | UK n = 9,871 | USA n = 6,548

Canadian Active considerers of New Zealand are most likely to be Vibrant Adventurers, Passive Passengers or Spontaneous Explorers

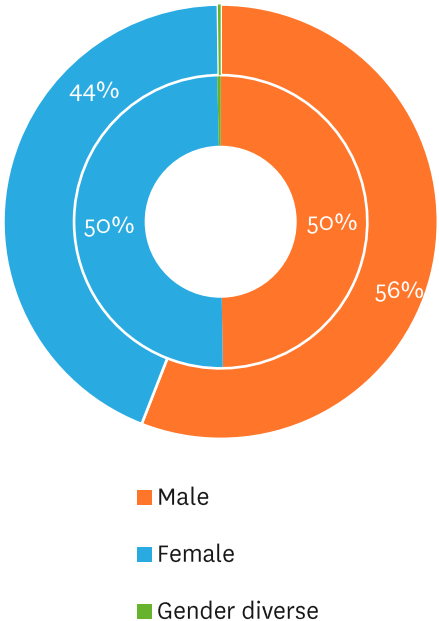
Profile of Active Considerer

% Active Considerers | % Non Active Considerers | Apr 22

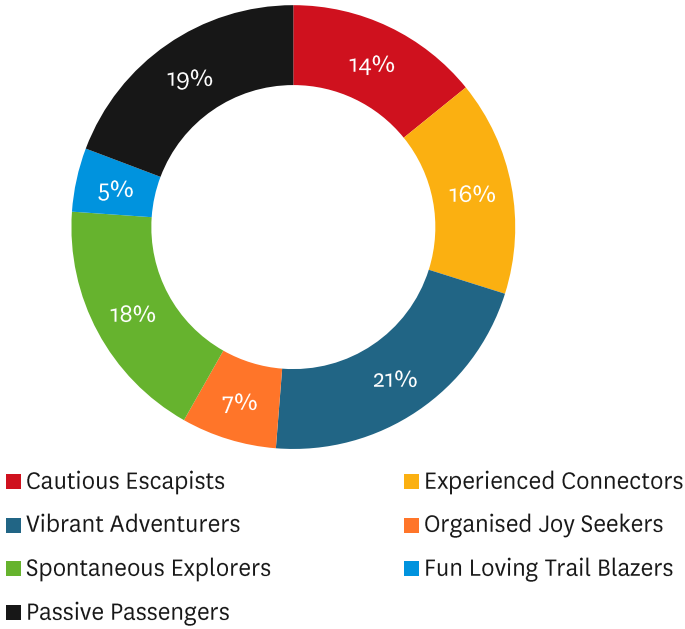
By age segment



By gender



Mindset Segments



2

Desirability of New Zealand as a holiday destination

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Australia and Hawaii are New Zealand's largest competitors based on preference ranking, but European countries make up most of the top 10 destinations

Top ten competitor set for ACs

% Active Considerers ranking destination
in top five | Apr 22

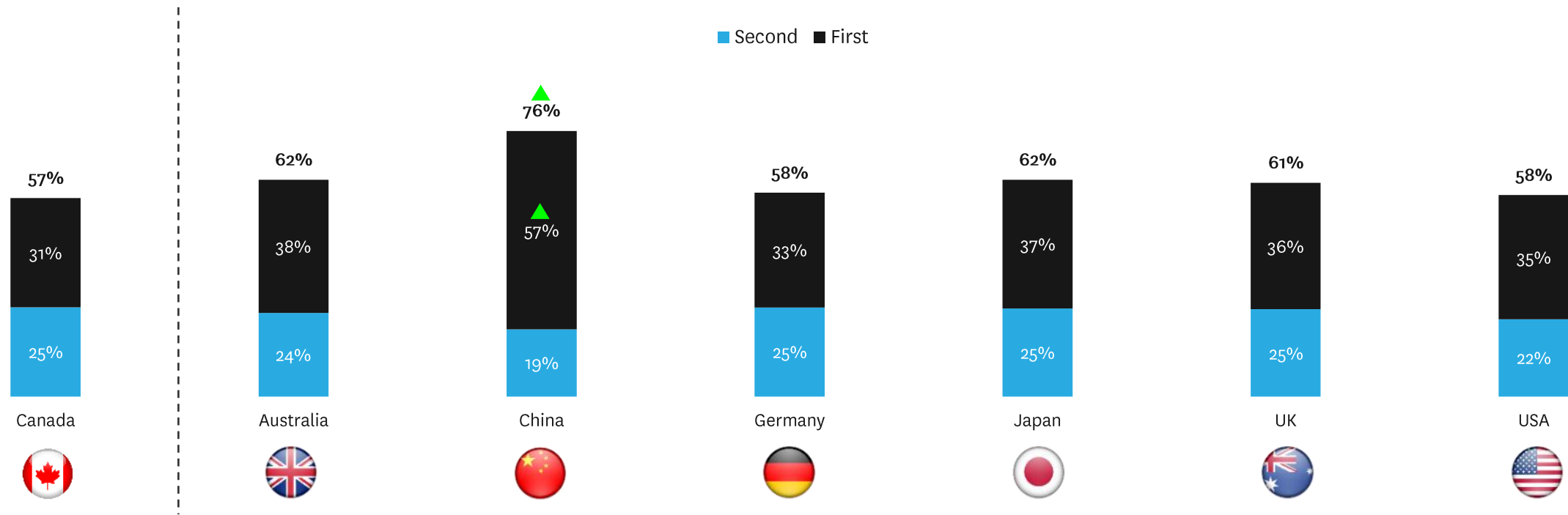


1. Sample sizes: Total ACs Apr 22 n = 500
2. Q "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a vacation?"

Preference for New Zealand is comparable between ACs in Canada, USA and Germany

Preference KPI vs. top six markets

% Active Considerers | Apr 22



Notes:

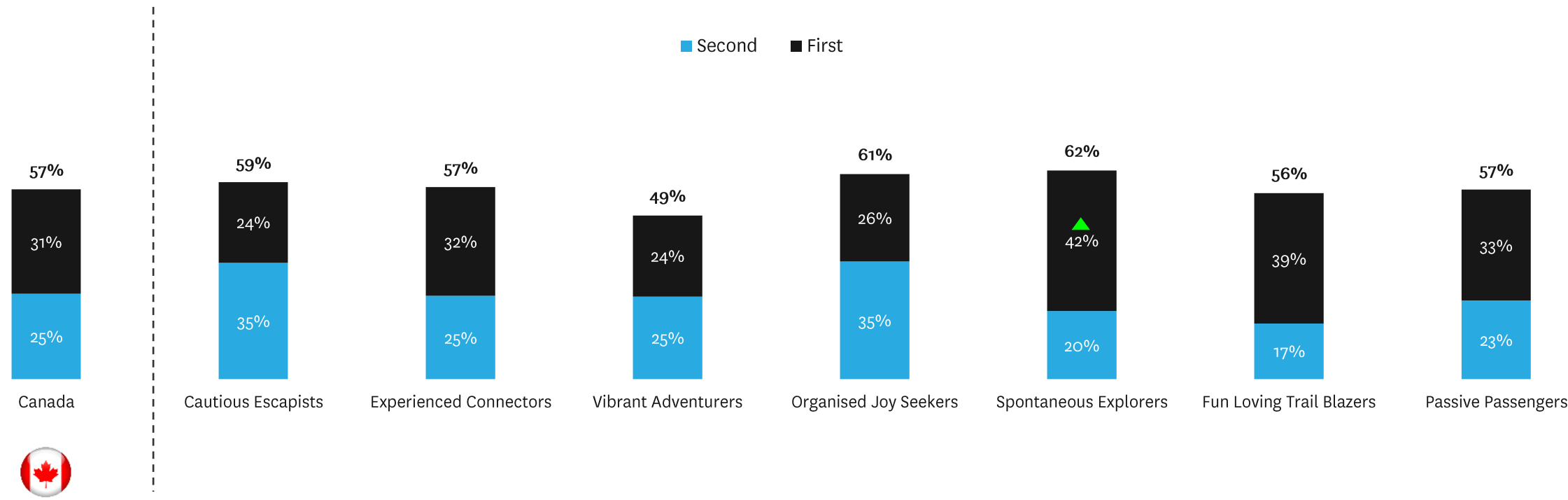
- 1. Sample size: Canada n = 500
- 2. Source for top 6 markets: AC Monitor | 6MRA | Total Active Considerers | Oct21-Mar22
Australia n = 1053 | China n = 1166 | Germany n = 1052 | Japan n = 1051 | UK n = 1050 | USA n = 1059
Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"



Preference for New Zealand is broadly similar across mindsets with the exception of the Spontaneous Explorers who are more likely to rank New Zealand as their most preferred destination

Preference KPI vs. top six markets

% Active Considerers | Apr 22



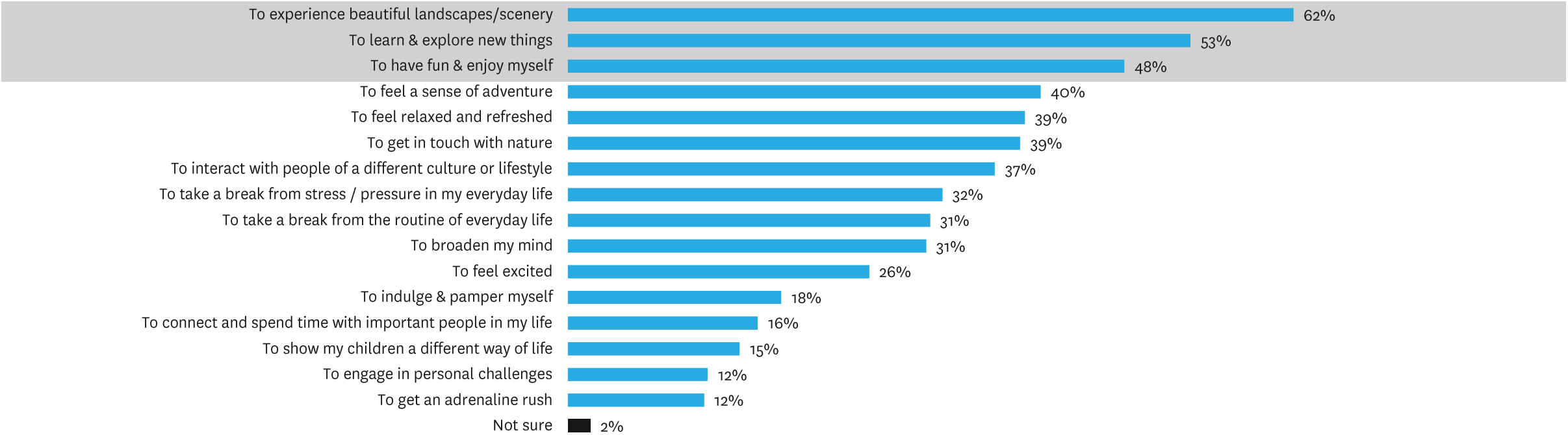
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Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"



The key drivers to visit New Zealand are to experience beautiful scenery and landscape, to explore and to have fun

Reasons to visit New Zealand

% Active Considerers | Apr 22



This heat map shows the relative performance of the attributes we measure that drive preference for New Zealand. Our role is to influence how our target audience perceive New Zealand relative to its competitive set; we cannot influence our competitors, we can only influence how New Zealand is seen through our communications

Relative brand positioning

Index (see appendix) | Total Active Considerers | Brand associations | New Zealand and top five competitors | Apr 22

Brand associations	New Zealand	Australia	Hawaii	Italy	Japan	Greece
Landscapes & scenery	102	99	105	87	96	102
Safe destination	101	101	94	95	99	107
Embraces visitors	100	96	110	99	94	102
Range of adventure	104	113	113	63	85	84
Clean & unpolluted	119	93	92	65	88	70
Fun & enjoyment	96	102	115	113	83	97
Friendly people	100	107	97	106	99	86
Range of experiences	95	98	100	109	116	104
Unique experiences	97	106	94	91	122	102
Comfortable	96	95	103	103	112	112
Escape the troubles of the world	107	86	110	80	92	100
Relax & refresh	99	91	140	84	79	100
Amazing wildlife experiences	117	137	85	45	73	45
Local culture	94	86	93	119	128	122
Quality food & wine	90	98	72	171	105	126
Affordable activities	104	92	85	114	98	105
Local experiences	99	99	102	108	100	96
Iconic attractions	85	97	89	145	121	134

Actions for TNZ:

More focus is needed on boosting our credentials over competitors in terms of:

- Having iconic attractions
- Range of adventure / experiences
- Being a comfortable place to visit

While leveraging our competitive strengths:

- Clean & unpolluted
- Amazing wildlife experiences
- A place you can escape the troubles of the world

3

Demand to travel post-Covid

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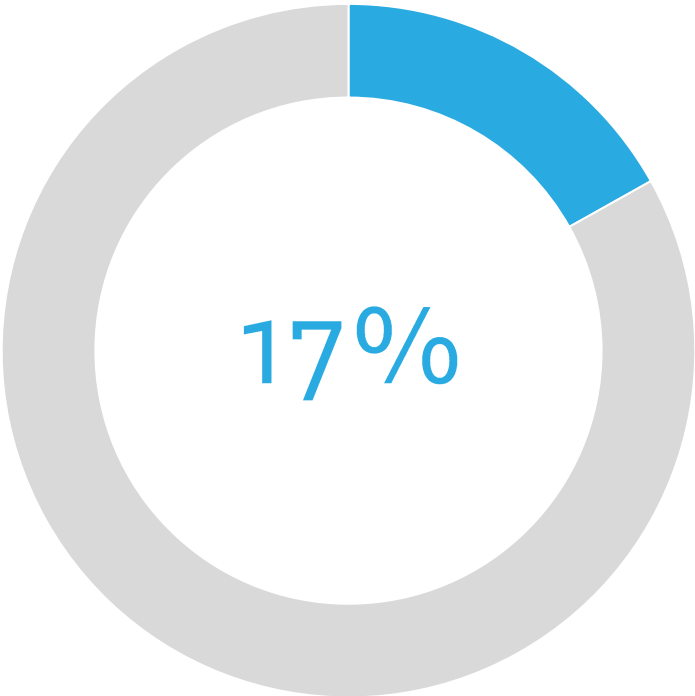


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17% of Canadian ACs have travelled overseas on vacation in the last six months, and 44% are looking to travel internationally by the end of the year

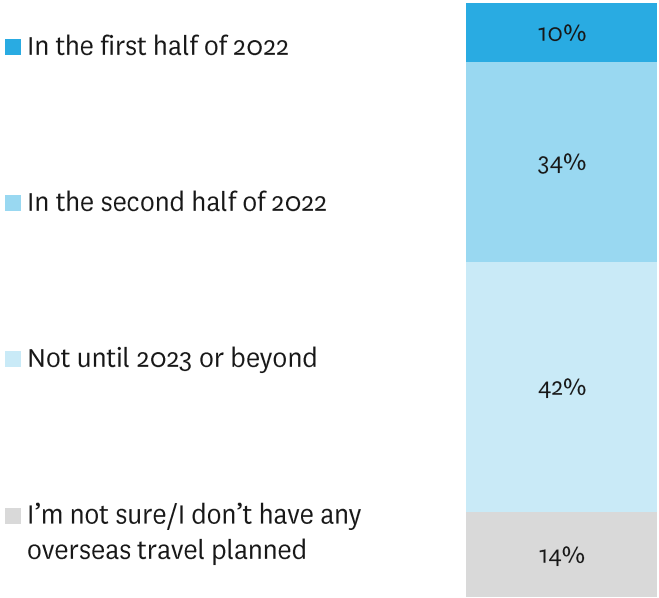
Travelled in the last six months

% Active Considerers | Apr 22



Travel intention timing for next holiday

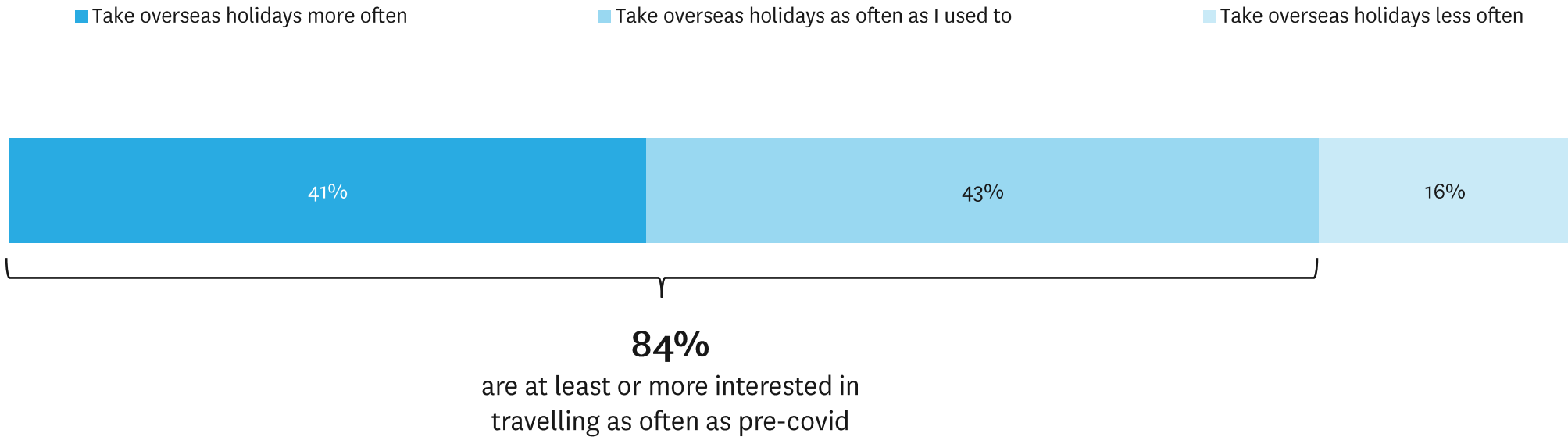
% Active Considerers | Apr 22



Appetite to travel overseas is high, with 84% of ACs looking to travel as much or more frequently than they did pre-Covid

Expected change to overseas holiday travel

% Active Considerers | Apr 22

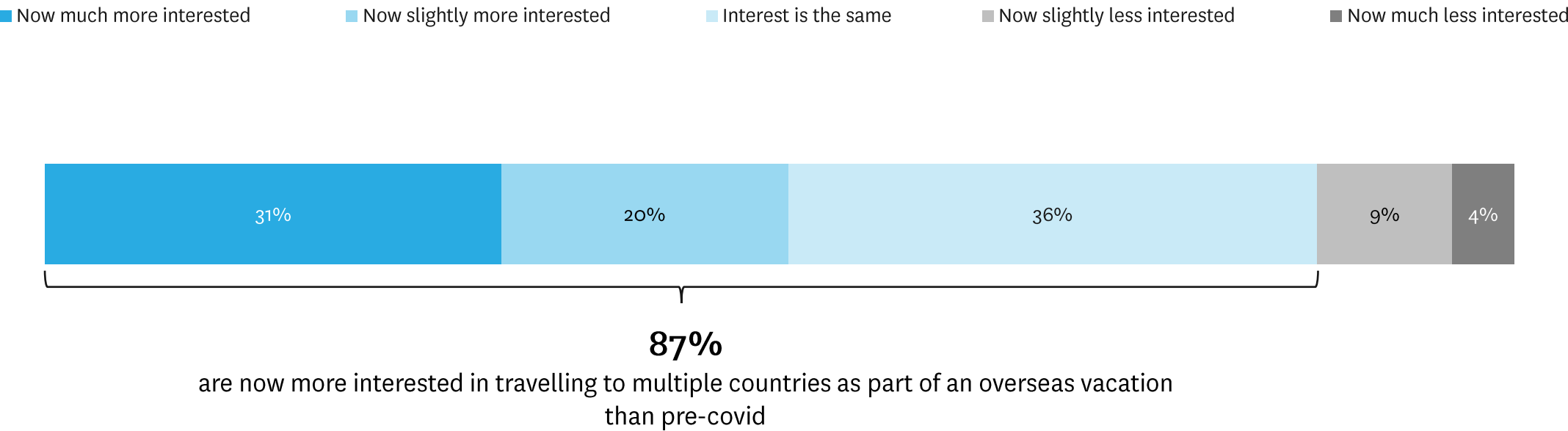


▲▼ significantly higher / lower than previous period

Relative to pre-Covid, there is growing interest in travelling to multiple overseas destinations as part of the same overseas vacation

Interest in travelling to multiple countries as part of an overseas vacation

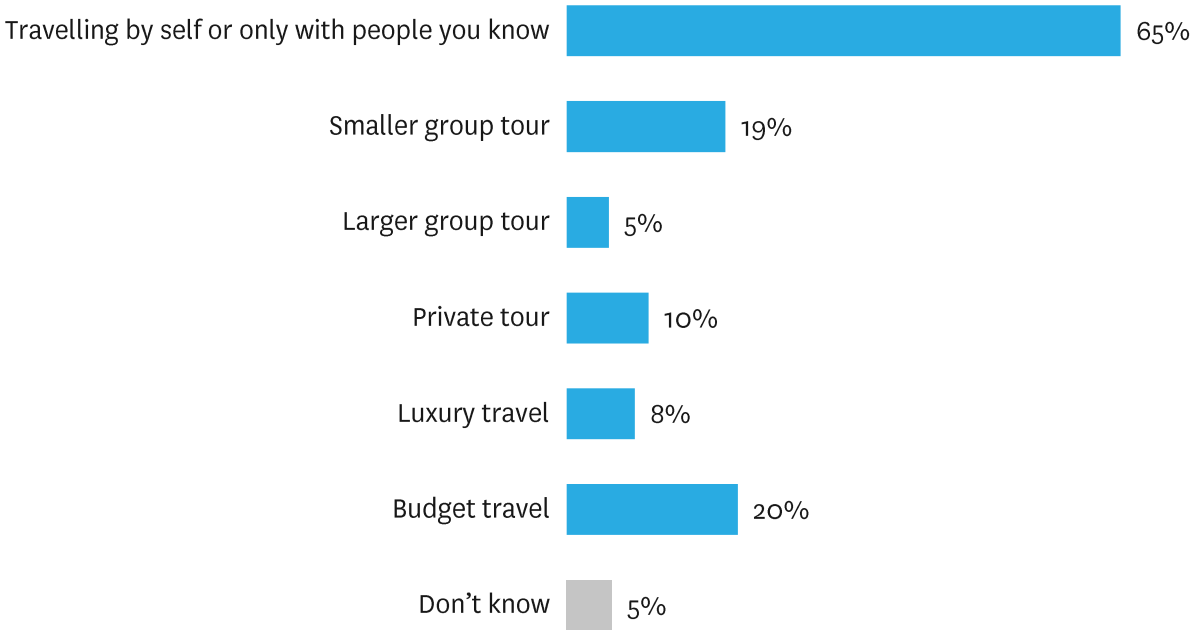
% Active Considerers | Apr 22



The majority of ACs are interested in travelling alone or with people they know, while one in four are interested in group tours

Interest in type of international holiday once travel restrictions lift

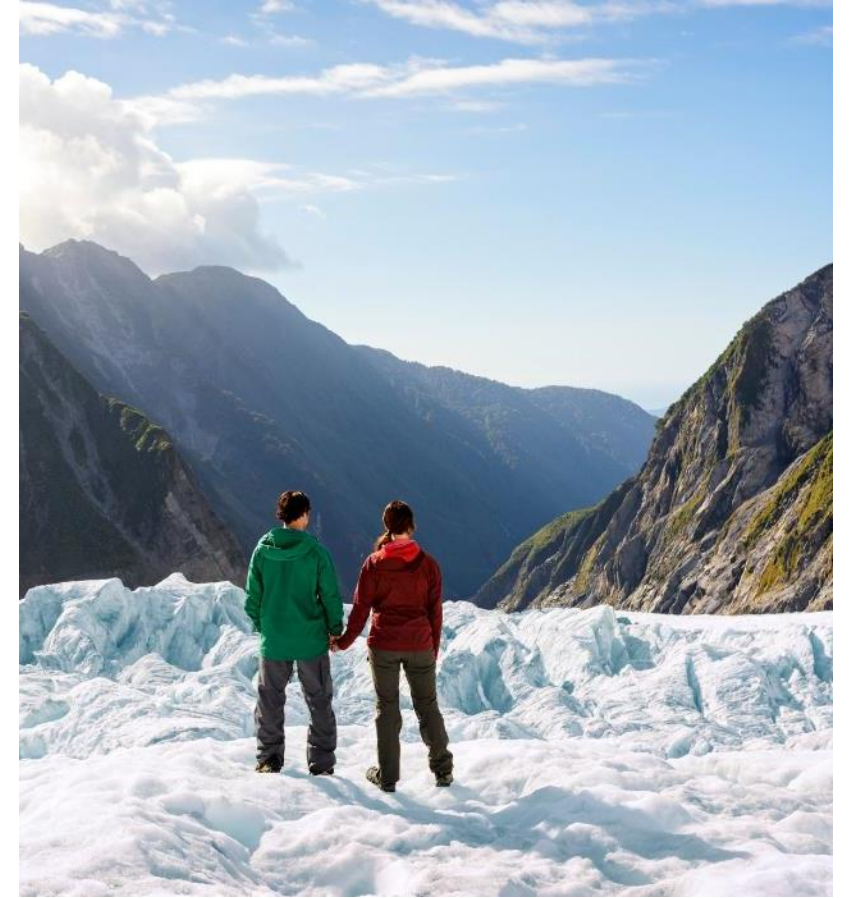
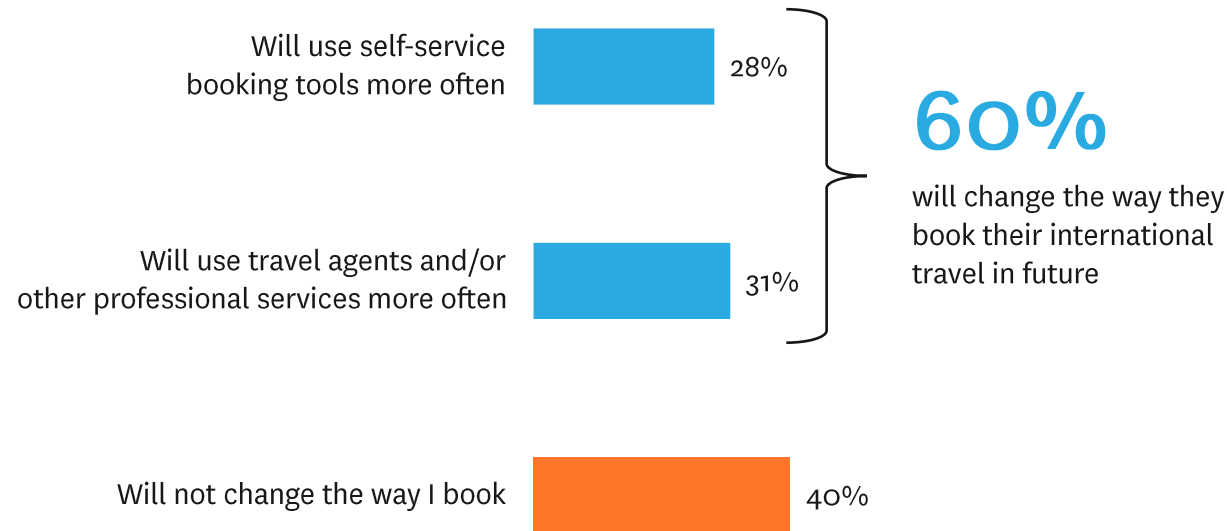
% Active Considerers | Apr 22



60% of ACs are likely to change how they book their overseas holiday. Self-service tools and travel agents are likely to be used more often compared to pre-Covid

Changes to overseas holiday booking method compared to pre-Covid

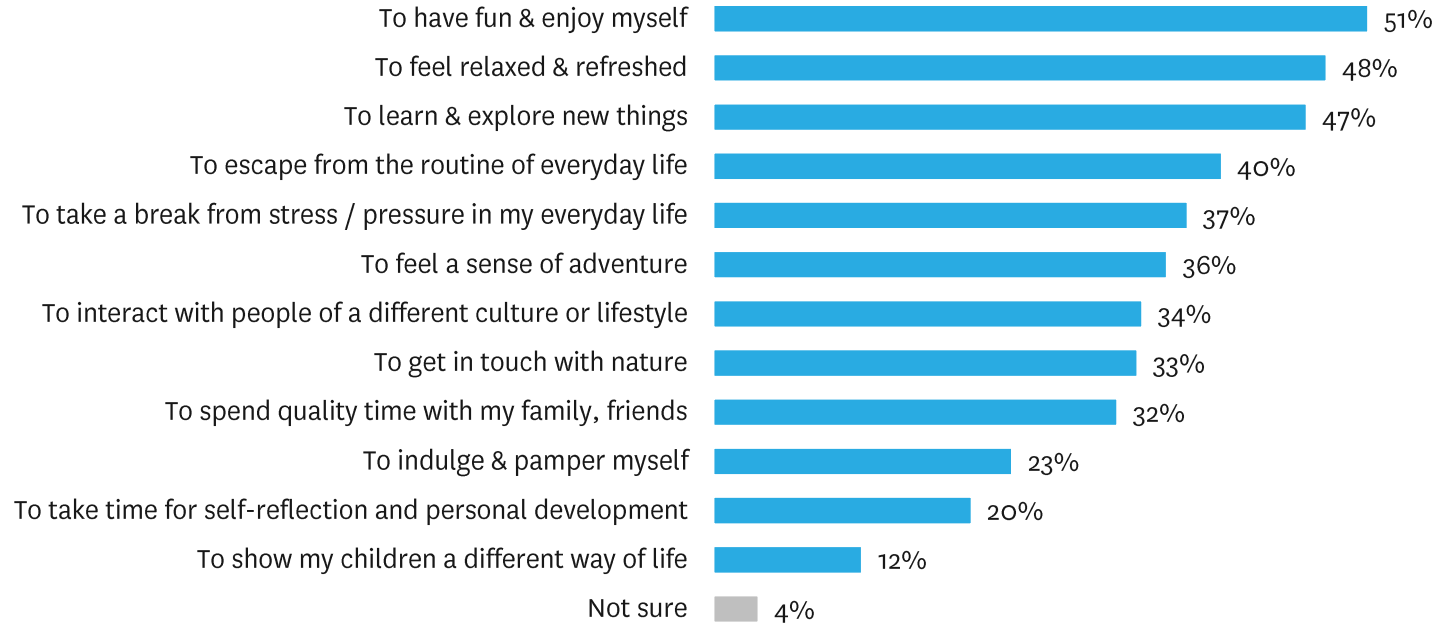
% Active Considerers | Apr 22



The desire to travel internationally for a vacation is being driven by the need for fun and enjoyment, to relax and refresh and to learn and explore new things

Needs/reasons driving the desire to travel internationally for a leisure holiday

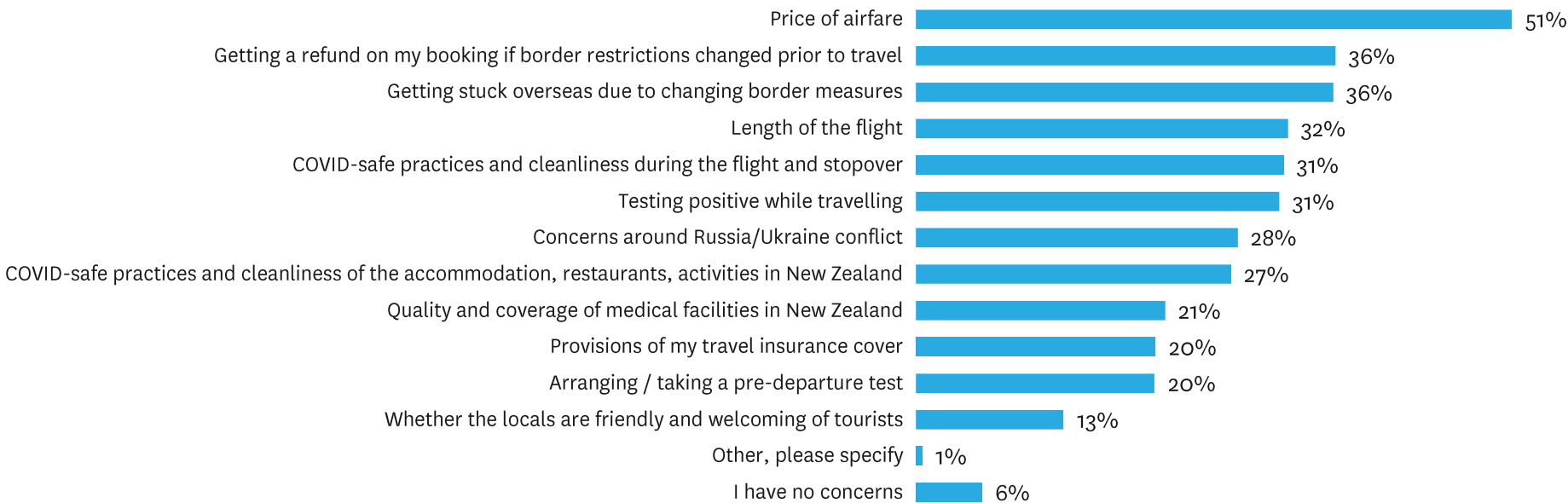
% Active Considerers | Apr 22



The price of the airfare is a key barrier to travel for Canadians, and unpredictable border changes are causing anxiety and concern when it comes to booking a holiday

Concerns about booking a holiday overseas

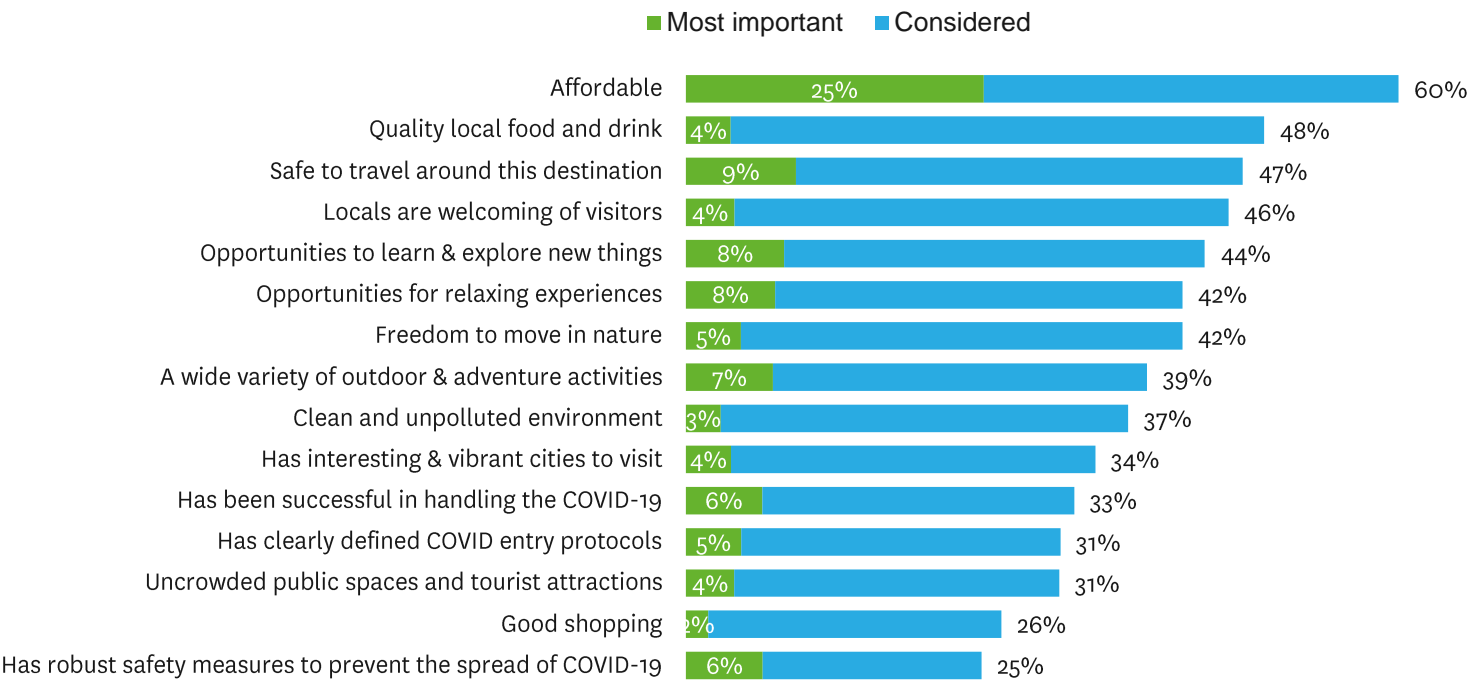
% Active Considerers | Apr 22



ACs are likely to prioritise destinations which are affordable, safe to travel around and offer opportunities to explore and relax

Attributes likely to be considered when choosing next destination

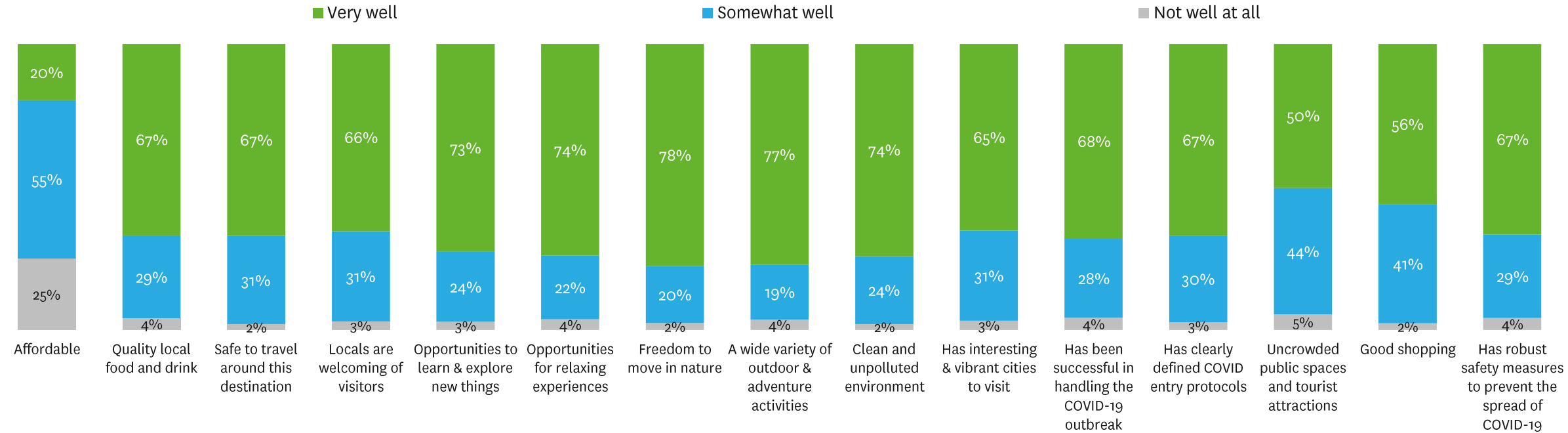
% Active Considerers | Apr 22



New Zealand is regarded positively across most attributes of importance with the exception of affordability where perceptions are relatively poor

New Zealand’s delivery of attributes considered when choosing destination after COVID-19

% Active Considerers | Apr 22



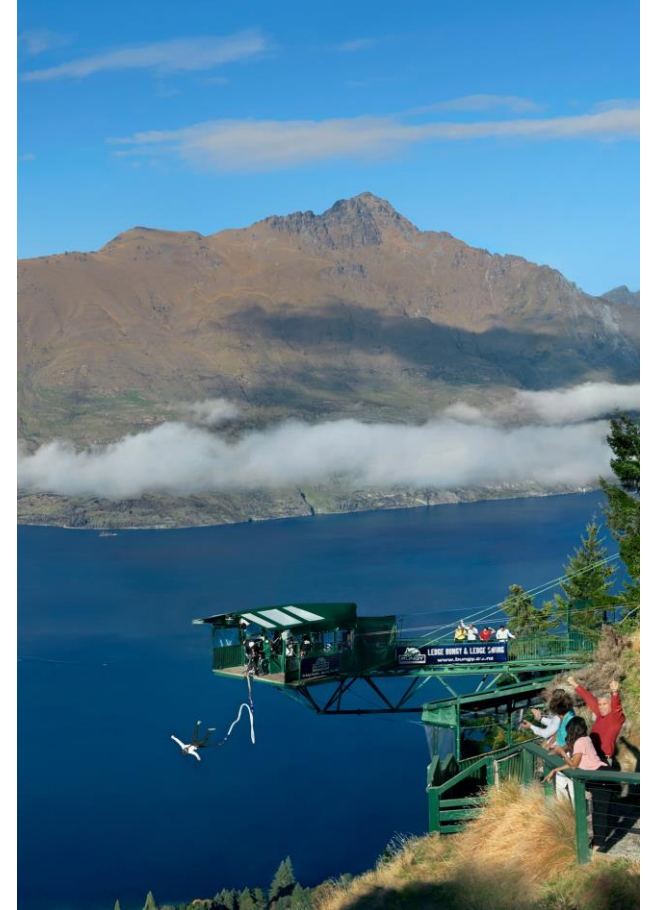
Notes:
1. Sample size: Canada n = 500
Q “In your opinion, how well does New Zealand deliver on each of these attributes?”



Other than waiting for New Zealand borders to open, which happened after the fieldwork period, the main barriers to booking a holiday to New Zealand are financial related

Barrier to booking holiday to New Zealand

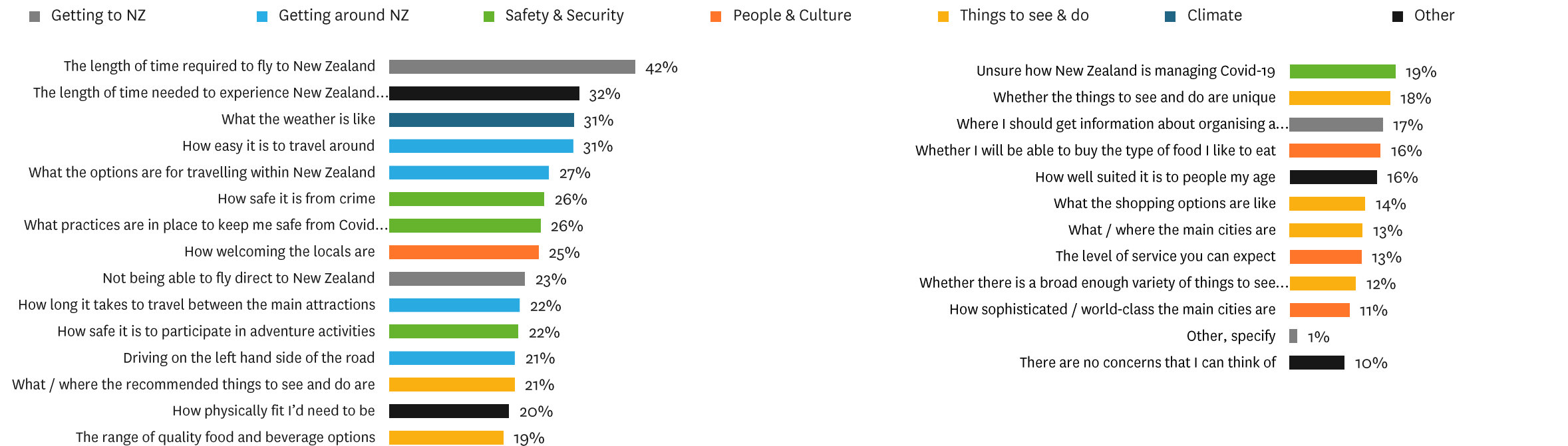
% Active Considerers | Apr 22



Logistics, in terms of the length of time required to travel to and around New Zealand, as well as ease of travelling around are top concerns

Concerns about choosing New Zealand as a holiday destination

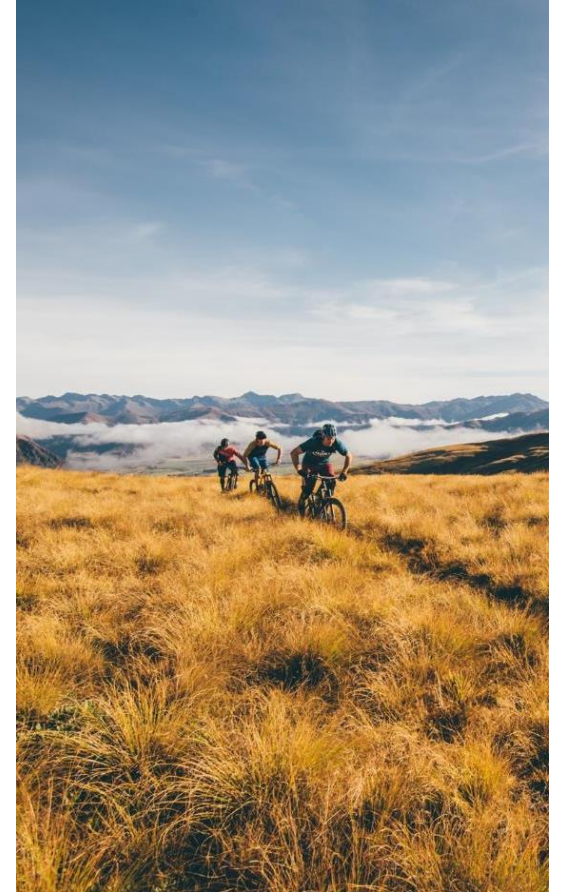
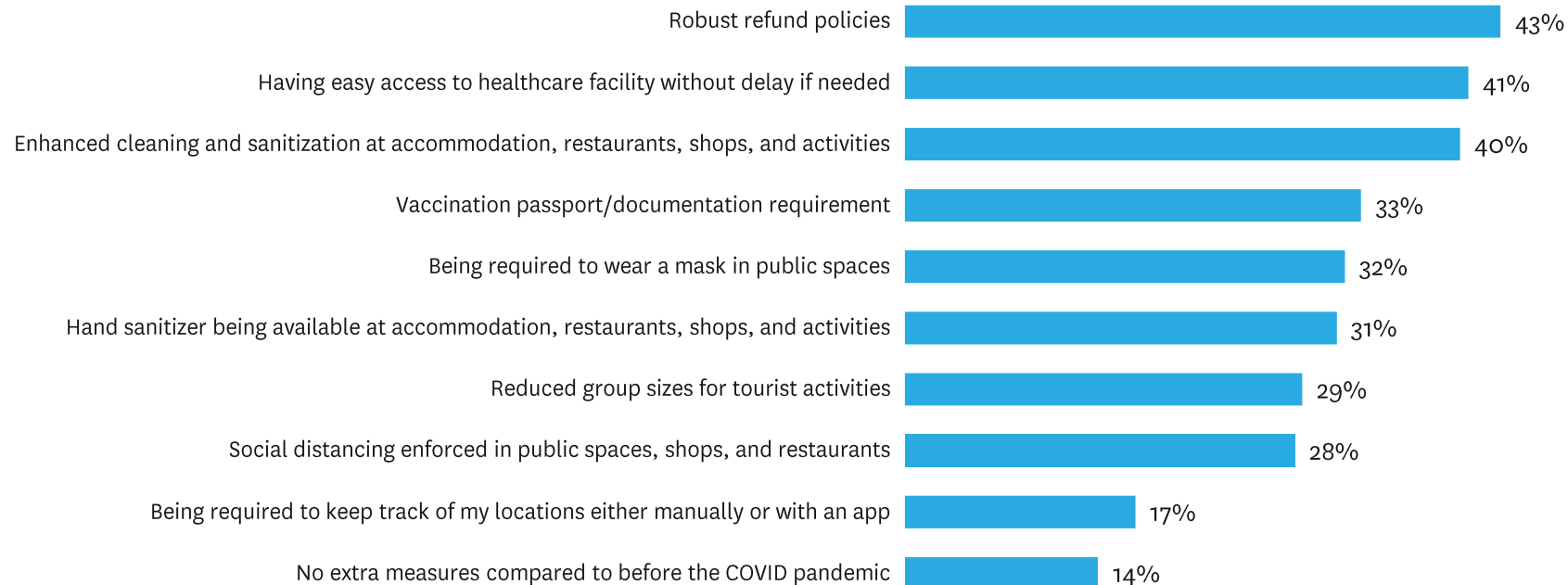
% Active Considerers | Apr 22



Flexible refund policies, ease of access to healthcare and enhanced sanitisation are measures that ACs would like to see implemented to make them feel safe

Measures would like to see implemented at the destination

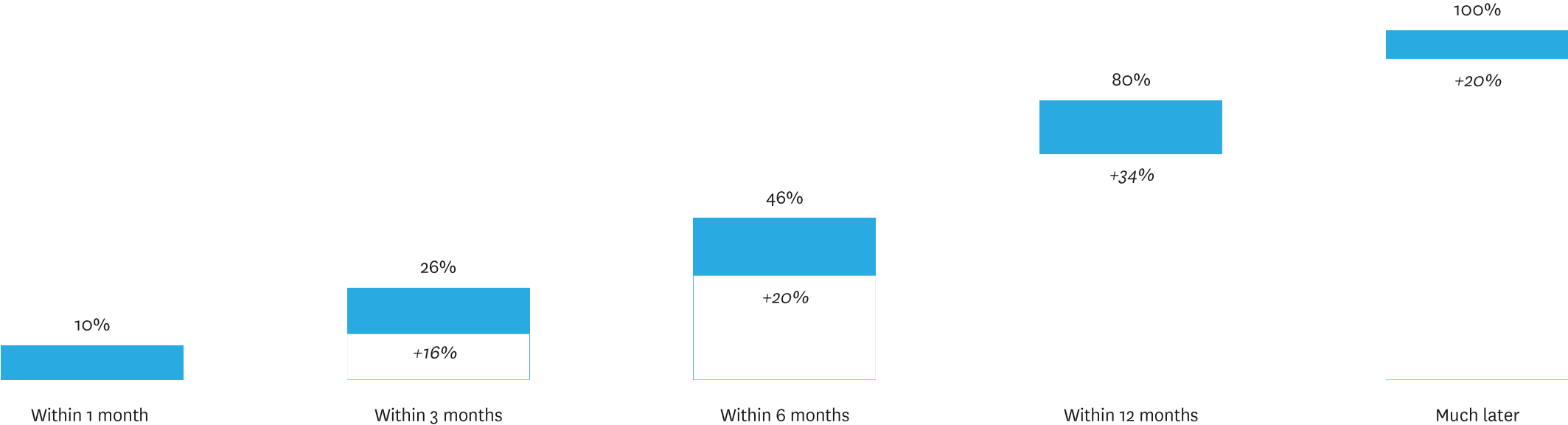
% Active Considerers | Apr 22



46% of Canadian ACs keen to travel to New Zealand within six months of borders opening

Speed of New Zealand holiday demand recovery after restrictions are lifted

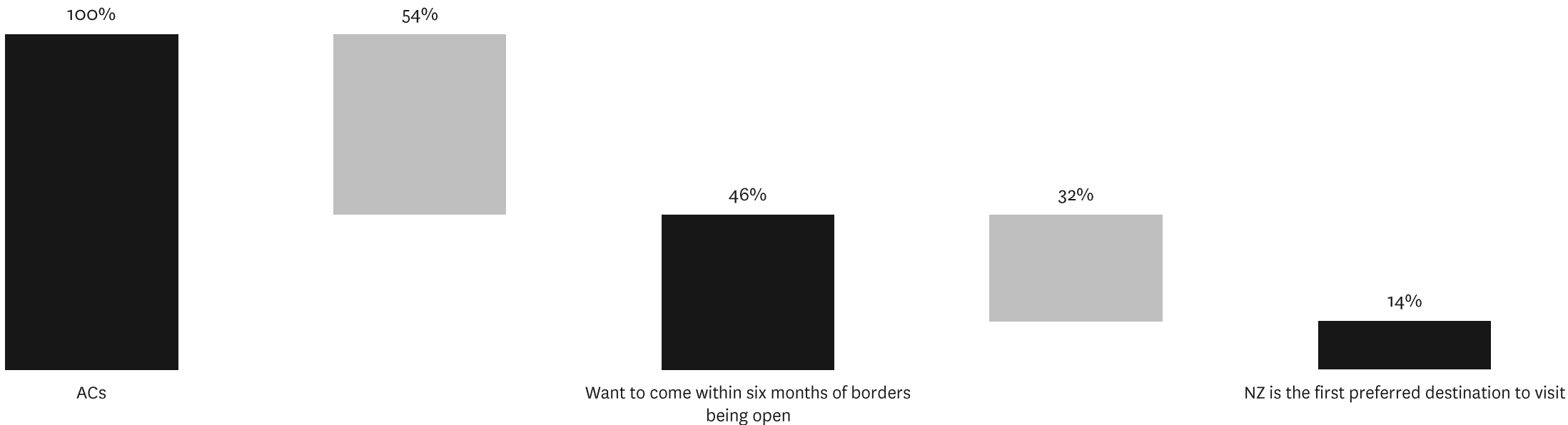
% Active Considerers | Apr 22



Around a third of those who want to travel to New Zealand within six months rate New Zealand as their preferred destination, equating to 14% of ACs overall

Most likely to come within the six months of restrictions being lifted

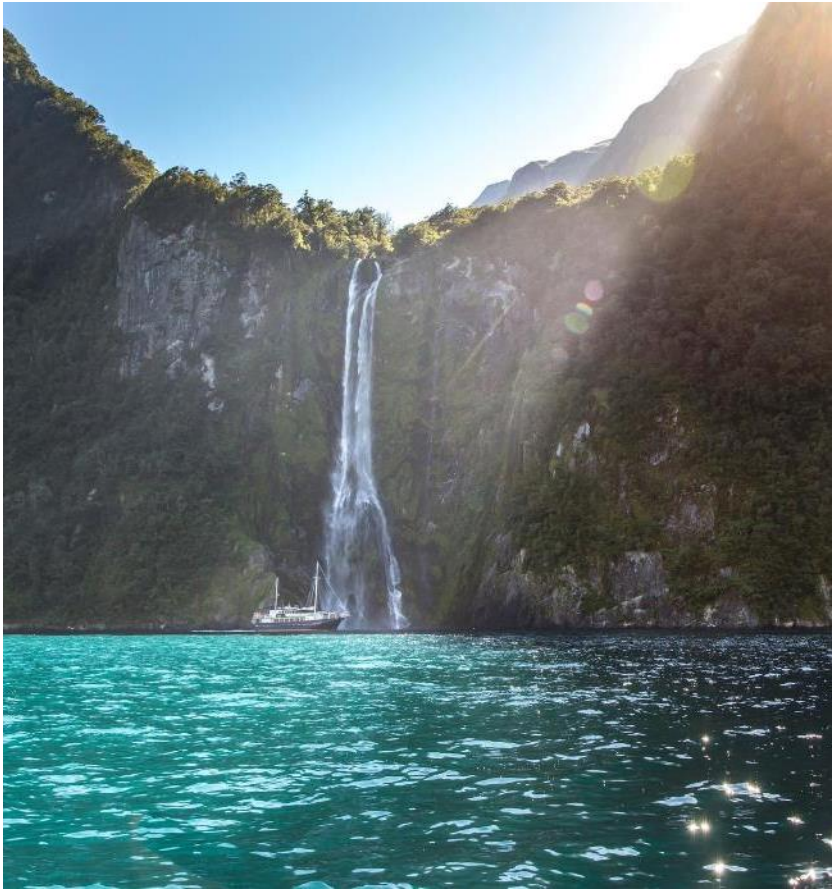
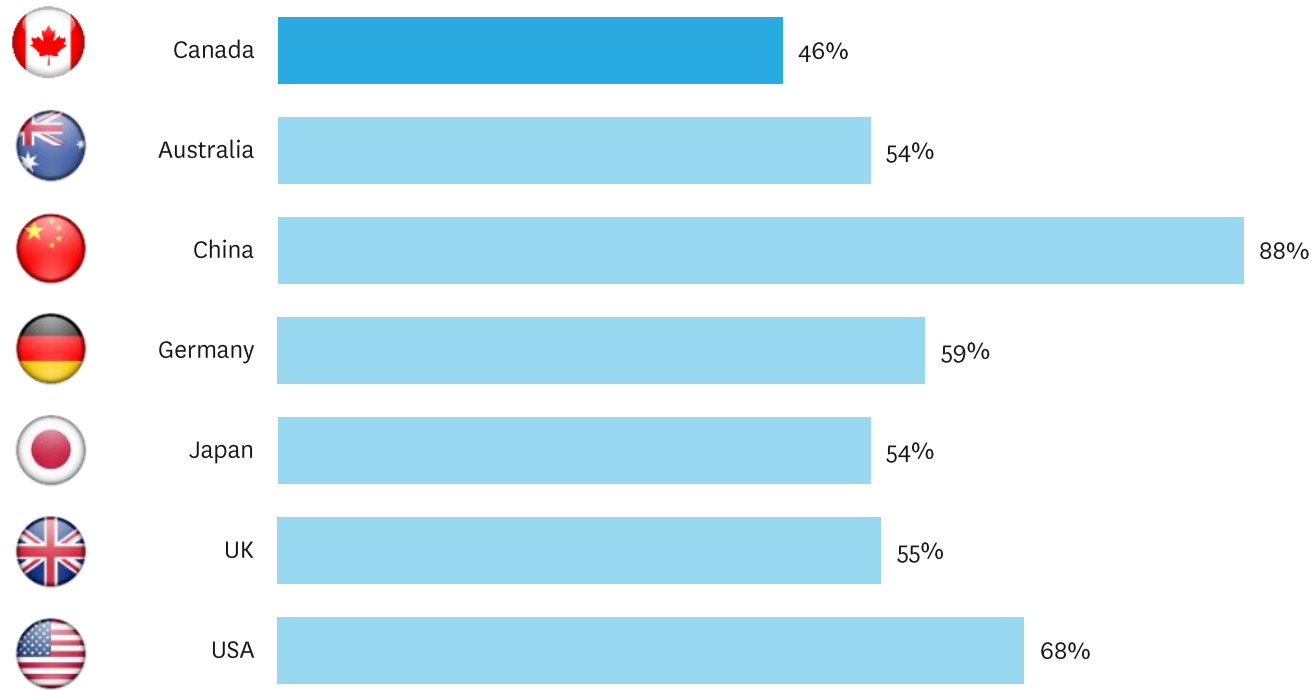
% Active Considerers | Apr 22



Canada's contribution to the recovery of New Zealand's holiday demand has the potential to be significant but less than key markets

New Zealand holiday demand recovery within six months vs. top six markets

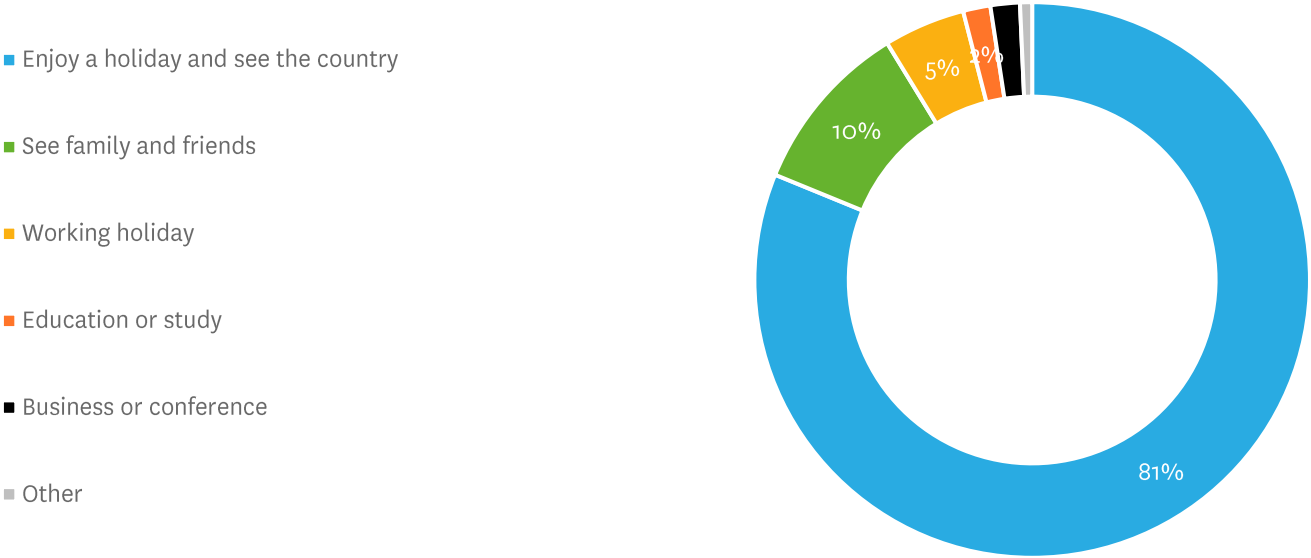
% Active Considerers | Apr 22



The core reason to book a trip to New Zealand would be to enjoy a holiday and see the country, although one in ten would be visiting family and friends

Key reason to book a trip to New Zealand

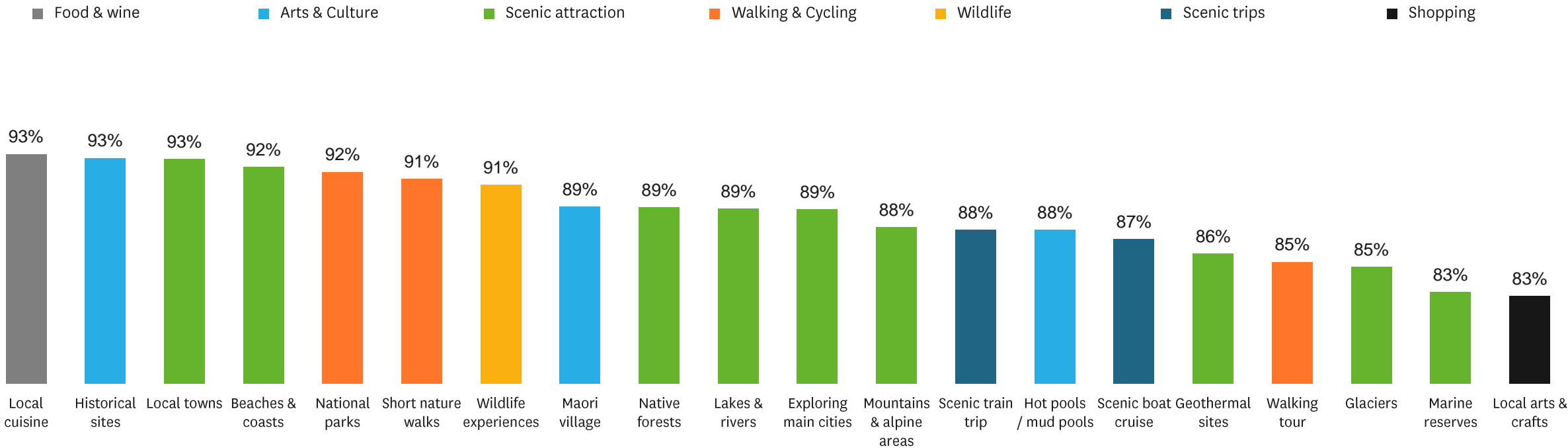
% Active Considerers | Apr 22



Canadian ACs show interest in a wide range of activities

Activities interested in doing in New Zealand (Top 20)

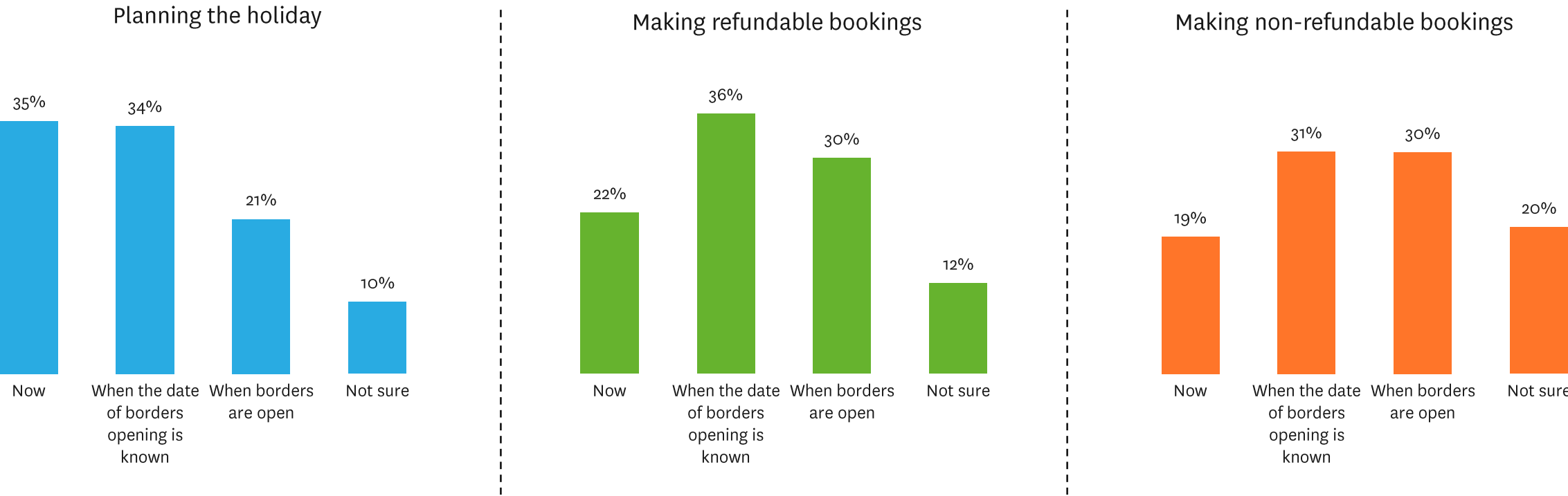
% Active Considerers | Apr 22



Now that borders are open, Canadian travellers will be more willing to book a trip to New Zealand

Readiness to do the following steps regarding their New Zealand holiday

% Active Considerers who want to come within six months of restrictions being lifted | Mar 22



▲ significantly higher / ▼ lower than previous period

Based on the anticipated New Zealand border opening in May 22 (at the time of interviewing), visits to New Zealand are likely to ramping up starting Summer 22/23

Visitation to New Zealand once visitors do not need to self-isolate

% Active Considerers | Apr 22

