KANTAR

Active Considerer (AC) Monitor

Asia Emerging Markets: July-December 2022

Report

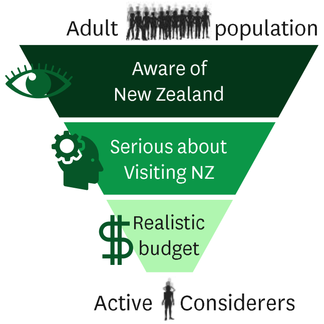
February 2023

AC Monitor research specifications

Kantar conducts a **monthly online survey** on behalf of Tourism New Zealand in the following key markets:

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

- Kantar conducts a **bi-annual survey** for emerging markets:
  - Canada, India, South Korea and Singapore
  - 300 – 500 ACs per country per wave



- We survey **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 TNS's 2022 market sizing exercise

Performance Dashboard

	Apr-Jun 22	Oct-Dec 22	Apr-Jun 22	Oct-Dec 22	Apr-Jun 22	Oct-Dec 22
Incidence: Percentage of the population who qualify as Active Considerers (ACs)	38%	33%	13%	19%	26%	20%
Preference KPI: (total)	82%	76%	68%	69%	59%	54%
First: The percentage of ACs who select New Zealand as their number 1 destination choice	64%	60%	45%	45%	35%	30%
Second: The percentage of ACs who selected New Zealand as their number 2 destination choice	18%	17%	24%	23%	24%	24%
Dreaming	22%	29%	N/A		N/A	
Planning	15%	7%				
Booking	63%	64%				

Performance Dashboard

Brand areas to focus on	**Strengths**: Culturally comfortable; Relationship with the land; Covid-19 management **Dial up**: Relax and refresh; Landscapes & scenery; Range of experiences	**Strengths**: Clean & unpolluted; Wildlife experiences; Unique national parks; Relationship with the land **Dial up**: Family friendly; Safe destination; Unique experiences; Local culture	**Strengths**: Clean and unpolluted; Unique national park; Landscapes & scenery; Range of adventure **Dial up**: Safe destination; Range of experiences; Embraces visitors; Culturally comfortable
Top 5 competitors *(% selected destination in their top five preferred destinations)*	Australia 41% Switzerland 37% Singapore 30% France 21% Canada 19%	Australia 43% Hawaii 32% Switzerland 28% France 27% Japan 25%	Japan 54% Australia 39% South Korea 29% Taiwan 24% Switzerland 24%
Top 5 questions or barriers to booking	*N/A*	*N/A*	1 What the weather is like 2 How easy it is to travel around 3 Length of time required to fly to New Zealand 4 Length of time needed to experience New Zealand properly 5 What practices are in place to keep safe from Covid

Key insights - India

- India presents a sizable opportunity for TNZ to increase its arrivals, with 10.6 million potential ACs in its three target cities. To effectively tap into this market, TNZ needs to concentrate efforts on strengthening its competitive position by focussing on key drivers of preference and addressing barriers that may be hindering AC's booking decisions

- It is essential to keep New Zealand top of mind for ACs because ACs want to travel soon: 64% of ACs are in the booking mindset and the majority of ACs would look to book a long-haul trip up to 3 months in advance

- Strategic brand messages should leverage New Zealand's reputation of being a warm and welcoming nation with a unique connection to its land. Additionally, there is an opportunity to strengthen preference by dialling up the wide range of experiences on offer, from those which are more relaxing to those which are adventure-filled

- Special occasions and work-related stress are key trigger moments for ACs when they consider taking a holiday. TNZ's messaging should target these moments by showcasing New Zealand as the perfect destination to escape the pressures of the world and unwind

- Consider trade partnerships with online travel agency websites, such as MakeMyTrip.com, to drive conversion at point of booking as these preferred booking channels

Key insights - South Korea

- The South Korean market remains an attractive opportunity for TNZ to drive arrivals. A growing number of South Koreans (19%, which is approx. 6.9M people) are now actively considering a New Zealand holiday

- To convert existing ACs, TNZ's focus should be on strengthening their preference for New Zealand and addressing key concerns and barriers to booking

- New Zealand is in a strong position to leverage its competitive strengths which include its pristine and unique nature, its connection to the land and the wildlife experiences on offer, all of which are key drivers of preference. However, there is room to raise New Zealand's profile of being a safe and family friendly destination that offers unique experiences - these are New Zealand's competitive weaknesses but are also key drivers of preference

- To drive brand salience, ensure New Zealand is present in the key channels ACs use for destination inspiration such as TV travel programs and social influencers. Being at key moments when ACs are thinking about taking a holiday such as immediate post-travel, key life events (retirement, honey moons, etc.) and special occasions is important

- There are opportunities to tailor content to meet travel preferences – namely, small group tours (8-10 people), travelling with immediate family and spending at least 6-10 days in New Zealand

Key insights - Singapore

- Singapore continues to be a compelling opportunity for TNZ – despite the incidence of Active Considerers sitting below peak levels seen in 2021, the current 20% equates to approximately half a million Singaporeans

- While the AC pool is sizeable, preference for New Zealand has been trending downwards which hinders TNZ's ability to convert ACs into arrivals. Thus, TNZ's focus should be on strengthening preference for New Zealand and addressing key concerns and barriers to booking

- Strategic brand messages should leverage New Zealand's strengths - namely, its pristine, spectacular and unique landscapes and being somewhere to relax. These messages need to be balanced with those that promote New Zealand as a welcoming and family-friendly destination that offers a wide range of experiences as these are also key drivers of preference

- TNZ can help progress more ACs through to the booking stage by reassuring ACs how easy it is to travel around New Zealand, and what the best time of year to visit it to make the most of the weather

- Partnering with airlines and aggregator websites such as Expedia and Trip.com should be considered given the majority of ACs would look to book flights and accommodation for New Zealand via these channels

INDIA


CANADA
GERMANY
UK
USA
CHINA
JAPAN
SOUTH KOREA
SINGAPORE
AUSTRALIA
NEW ZEALAND

Active Considerer journey funnel – India

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 (160,000 INR per person on a holiday to New Zealand)

Online population, 18-74 years of age[1] (32.2m)

74%

Find New Zealand highly appealing as a holiday destination, and... **23.8m**

87%

Would seriously consider visiting in the next three years, and... **20.7m**

95%

New Zealand is a preferred destination for their next holiday, and... **19.7m**

54%

Willing to spend at least INR 160,000 per person on a holiday to New Zealand[2] **10.6m**

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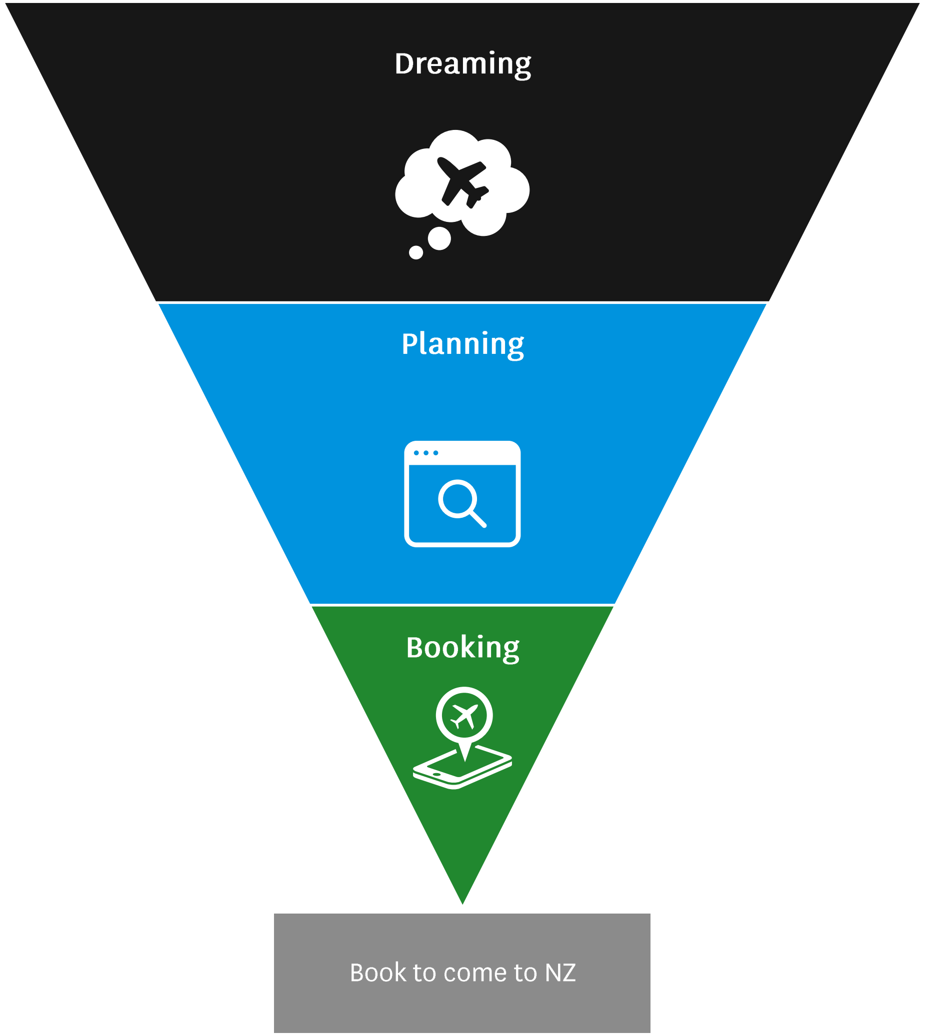
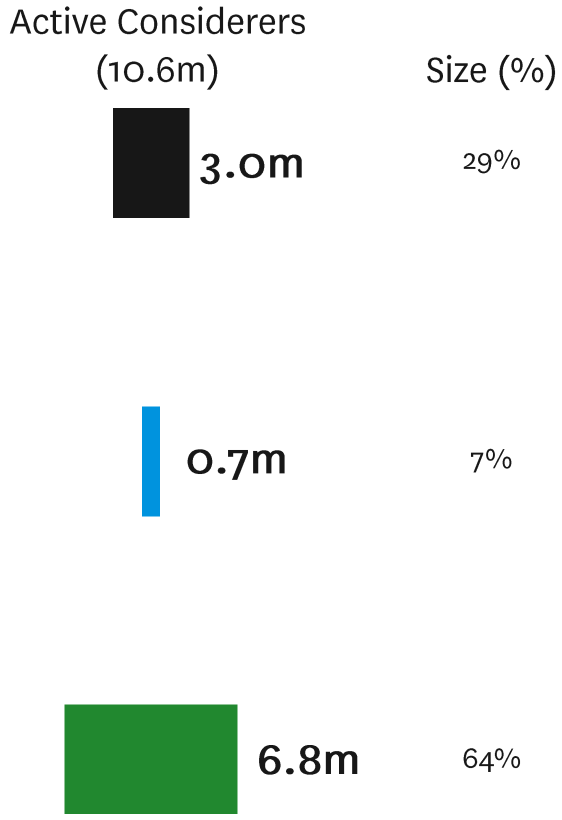
1. Target cities are New Delhi, Bangalore and Mumbai
2. Including accommodation and daily expenses. Based off actual market data spend (IVS 2019)

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

Journey funnel to New Zealand - India





Comments

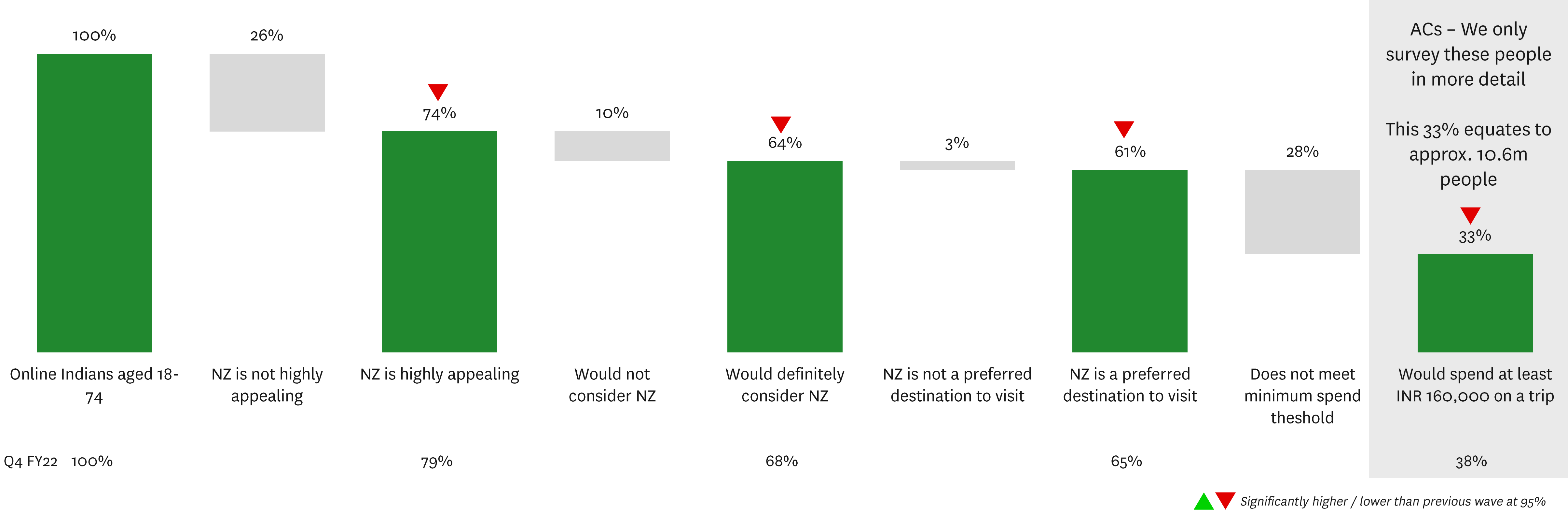
A large proportion of ACs (64%) claim to be ready to book, and this figure should be placed in context:

- ‘Ready to book’ is a claimed state of mind
- It doesn’t mean ACs will book a flight tomorrow if possible to do so, but that the commitment to visit New Zealand is there, and they feel confident enough to consider it a place they’d book travel to
- A number of extrinsic (e.g. price, availability) and intrinsic (e.g. annual leave) factors need to align to make booking / conversion a reality
- We know that people continue researching and planning after reaching the ‘ready to book’ stage; it does not mean the end of engagement between consumers and TNZ / industry players

Despite the AC incidence declining in the last quarter, India remains an attractive market for TNZ with approximately 10.6 million potential ACs

Qualifying criteria for defining ACs

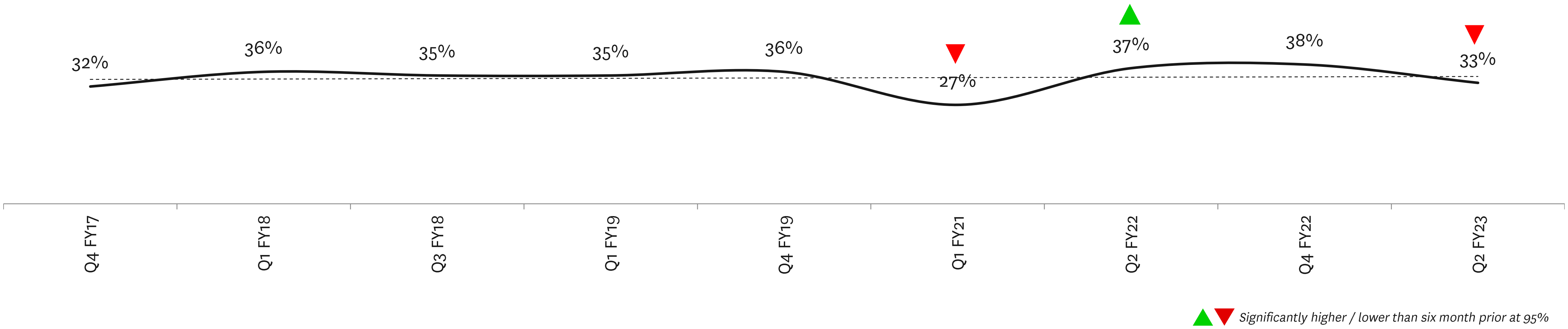
% Online users aged 18-74 in the target cities | Q2 FY23



After reaching peak levels in 2022, AC incidence has dropped back to pre-Covid levels

Incidence of ACs

% Online users aged 18-74 in the target cities

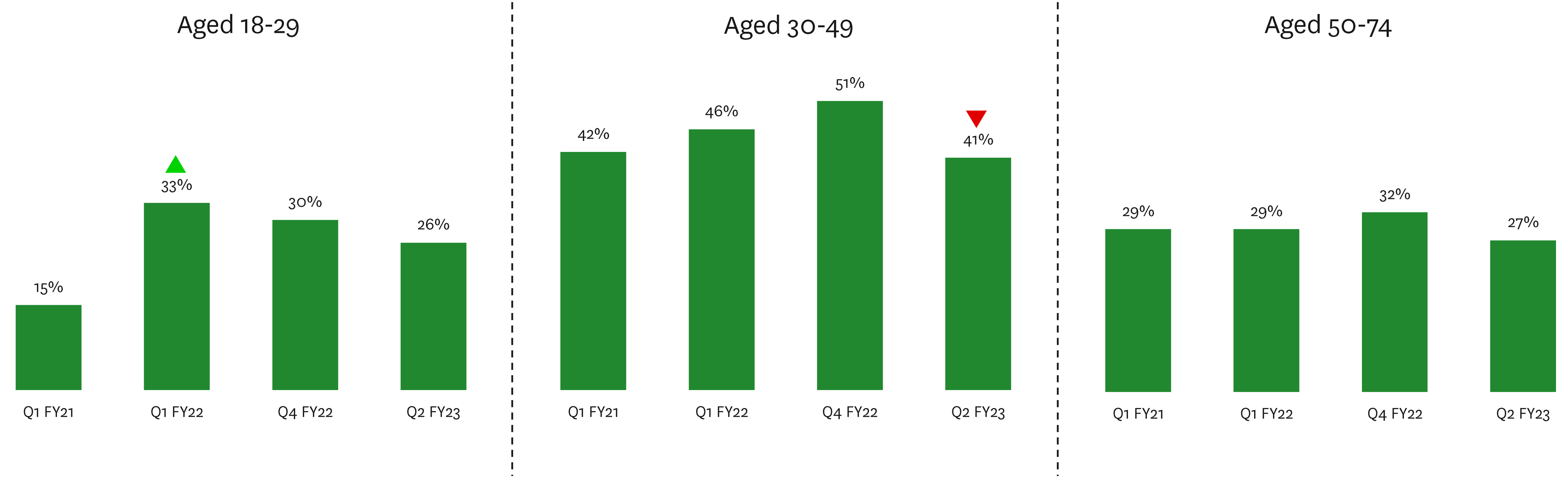


Sample size: Q4 FY17 n=741; Q1 FY18 n=816; Q3 FY18 n=817, Q1 FY19 n=763; Q4 FY19 n=726; Q1 FY21 n=1016; Q2 FY22 n=867; Q4 FY22 n = 1,419; Q2 FY23 n = 1,349
% of population who find New Zealand as a holiday destination as highly appealing (%8-10), has strong consideration to holiday in New Zealand (%8-10), strongly prefers to holiday in New Zealand (%4-5), and would spend at least $1,500 AUD while holidaying in New Zealand

The recent dip in the ACs incidence is seen across each age group, but most notably among those aged 30-49 years

Incidence of ACs

% Online users aged 18-74 in the target cities | By age group



Significantly higher / lower than previous wave at 95%

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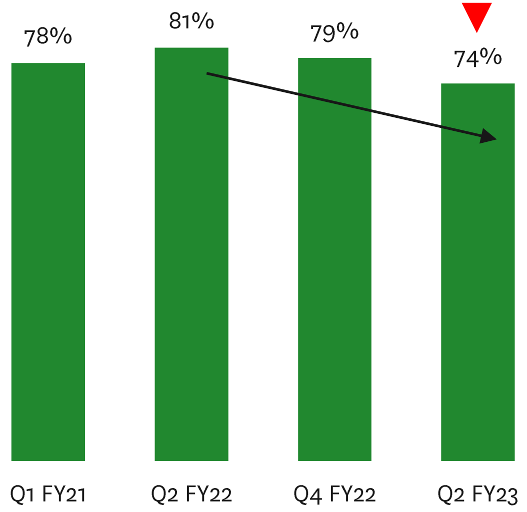
Sample sizes (Q1 FY21 | Q1 FY22 | Q4 FY22 | Q2 FY23) Aged 18-34 n = 1,705 | 1,505 | 1,881 | 1,330. Aged 35-55 n = 2,262 | 1,134 | 1767 | 1,481 . Aged 56 – 74 n = 263 | 216 | 329 | 336
% of population who find New Zealand as a holiday destination as highly appealing (%8-10), has strong consideration to holiday in New Zealand (%8-10), strongly prefers to holiday in New Zealand (%4-5), and would spend at least $1,500 AUD while holidaying in New Zealand

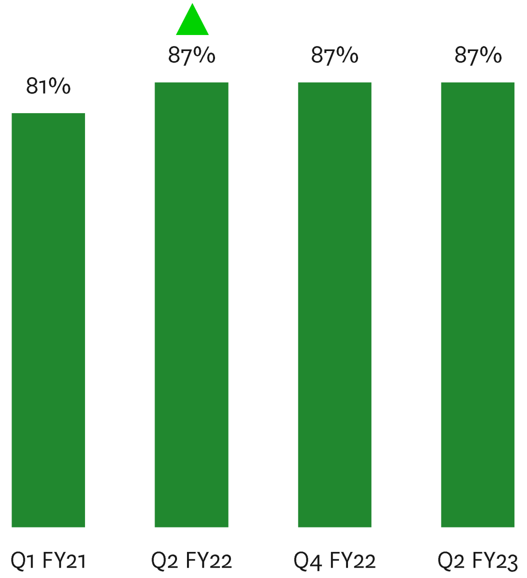
NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

The decline in the AC incidence is driven by two factors: decline in the appeal of New Zealand and decline in willingness to spend at least INR 160,000 on New Zealand holiday

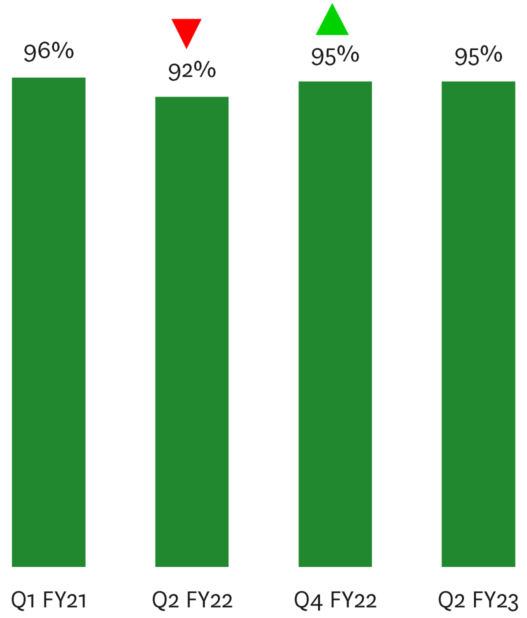
Appeal of New Zealand (%8-10)
% Online users aged 18-74 in the target cities



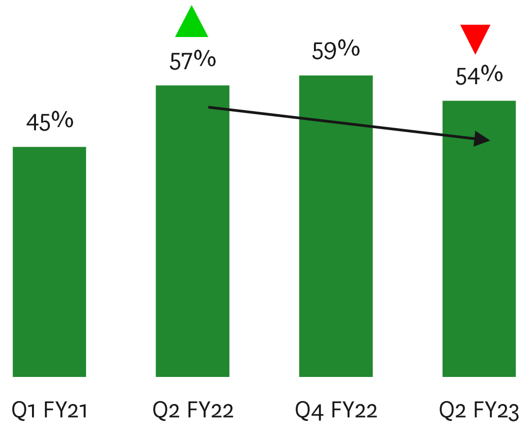
Consideration of New Zealand (%8-10)
% Those who find NZ appealing



NZ is a preferred destination (%4-5)
% Those who would consider visiting



Anticipated spend on holiday in New Zealand (>INR 160,000)
% Those who agree NZ is a preferred holiday destination



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

Sample sizes: Q1 FY21, Q2 FY22, Q4 FY22, Q2 FY23 . Appeal n = 1016, 867, 1419, 1349. Consider n = 798, 704, 1127, 1004. Preference n = 669, 618, 973, 872. Spend n = 638, 578, 928, 828.
Q "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?" Q" Would you consider visiting New Zealand for a holiday within the next three years?"
Q" To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"

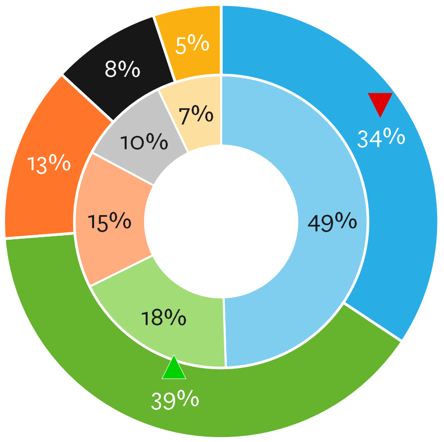
Those aged under 40 years old make up 73% of ACs while the global priority mindsets make up 24% of ACs

Profile of Active Considerer

% Active Considerers | % Non Active Considerers | Q2 FY23

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

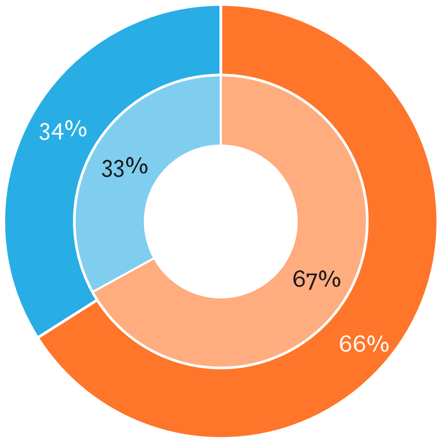
By age segment



■ 18 - 29 years ■ 30 - 39 years ■ 40 - 49 years

■ 50 - 59 years ■ 60 - 74 years

By gender

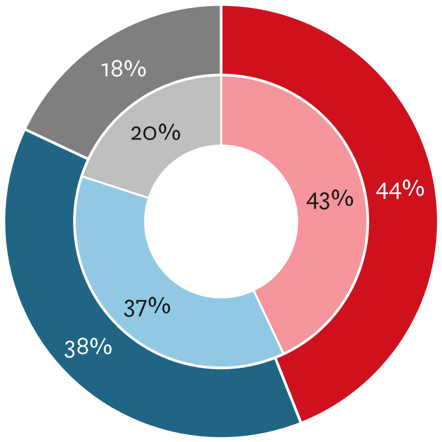


■ Male

■ Female

■ Gender diverse

By region

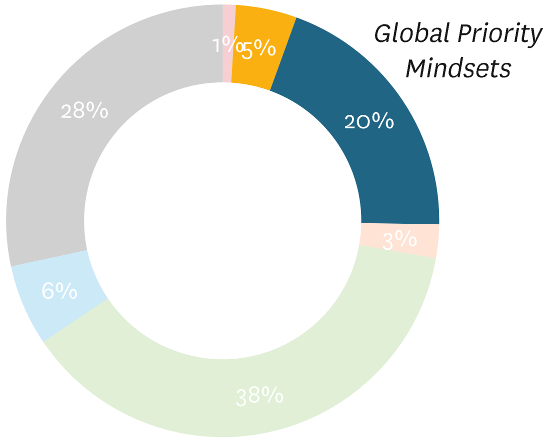


■ New Delhi

■ Mumbai

■ Bangalore

Mindset Segments



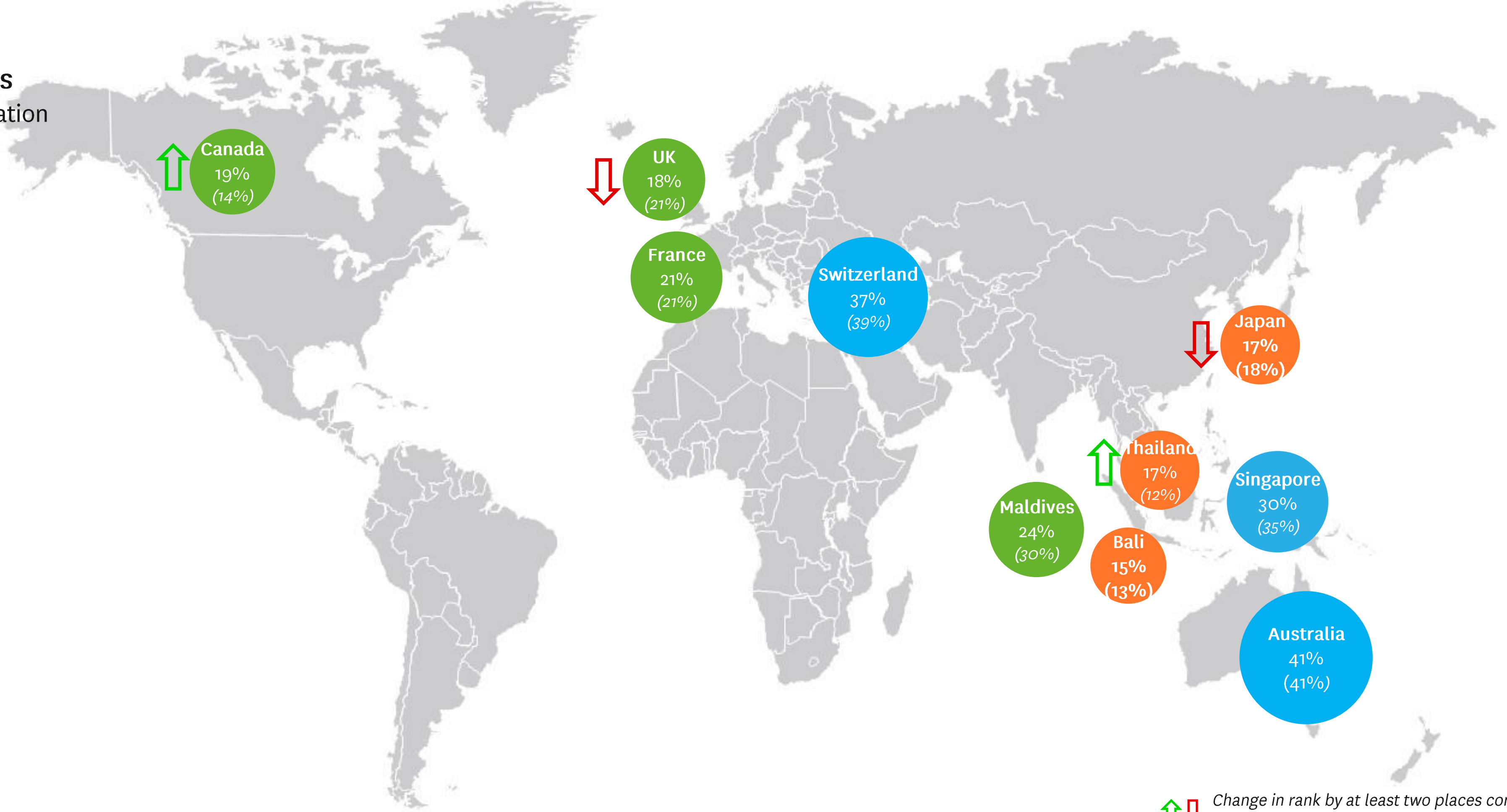
■ 1:Cautious Escapists ■ 2:Experienced Connectors
■ 3:Vibrant Adventurers ■ 4:Organised Joy Seekers
■ 5:Spontaneous Explorers ■ 6:Fun Loving Trail Blazers
■ 7:Passive Passengers

▲▼ *Significantly higher / lower than non AC's*

Australia and Switzerland continue to be New Zealand's strongest competitors based on preference among Indian ACs

Top ten competitor set for ACs

% Active Considerers ranking destination in top five | Q2 FY23



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

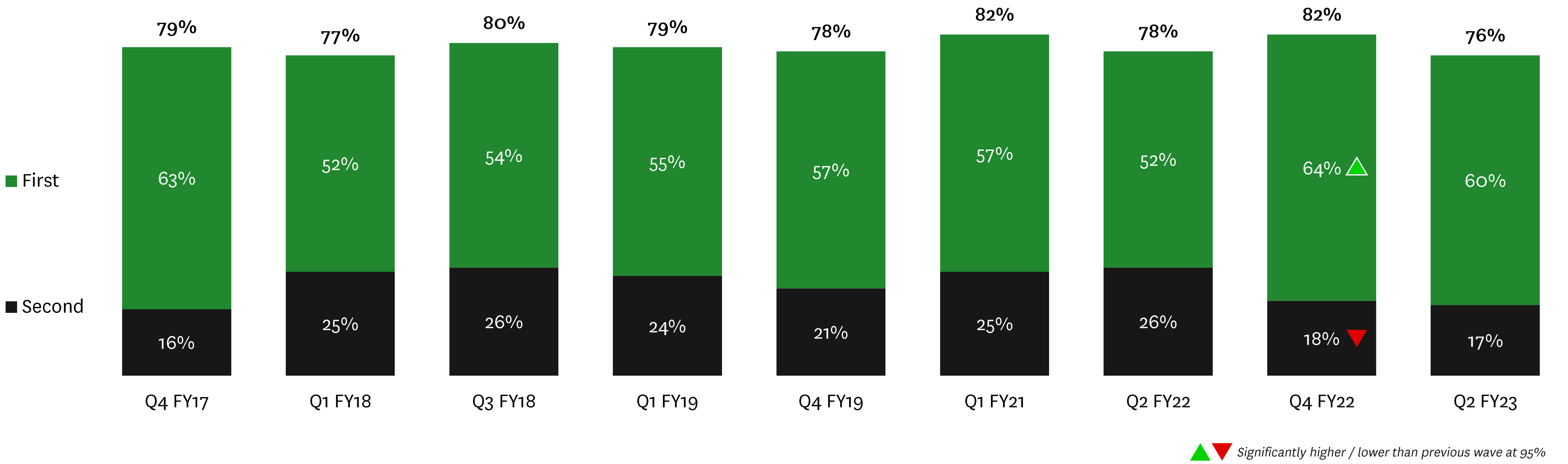
Change in rank by at least two places compared to previous wave

Sample sizes: ACs Q4 FY22 n = 300 ; Q2 FY23 n = 300

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 has softened since it peaked in the last quarter of 2022.

Preference KPI
% Active Considerers



Sample sizes: Q1 FY21 ACs n=300; Q2 FY22 ACs n=300; Q4 FY22 n = 300; Q2 FY23 n = 300
Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

Preference for New Zealand is similar among priority and non-priority mindsets

Preference KPI

% Priority mindset group I Non-priority group I Q2 FY23

Context to preference drivers

- When it comes to choosing a travel destination, not all factors are equally important. We use a method called Jaccard's analysis to estimate which destination attributes have most influence over people's preference for New Zealand as a travel destination.
- We also compare New Zealand's performance with performance among competitors (specific to the market) to help us prioritise which areas to focus our marketing efforts on for each of our key markets.
- We typically conduct a brand driver analysis annually for our key markets, the brand driver analysis included in this report is based on the most recent results available: Data from Jan-22 to Dec-22.

There is an opportunity to promote New Zealand as being a family friendly destination perfect for escaping everyday life as these emerge as stronger drivers of preference post-pandemic

Top 15 drivers of preference for New Zealand

AC Monitor | % | 2022 (Jan-Dec 22) | Total Active Considerers | Index (see appendix)

Latest results	2022 rank		2018 rank[(1)]
Escape normal life	1	⇧	6
Family friendly	2	⇧	8
Clean & unpolluted	3		5
Fun & enjoyment	4	⇧	9
Unique experiences	5		7
Culturally comfortable	6	⇧	19
Relax & refresh	7	⇧	13
Safe destination	8		11
Landscapes & scenery	9	⇩	1
Friendly people	10	⇧	16
Relationship with the land	11		*
Covid-19 management	12		*
Range of experiences	13		10
Easy to travel around	14	⇧	26
Local culture	15	⇧	23

Latest results	2022 rank		2018 rank[(1)]
All seasons	16		14
Range of adventure	17	⇩	4
Local experiences	18		20
Interesting cities	19		21
Unique national parks	20		*
Escape troubles	21		*
Indigenous culture	22		*
Wildlife experiences	23		*
Iconic attractions	24		22
Challenging	25	⇩	17
Embraces visitors	26		*
See lots without travelling far	27		24
Affordable activities	28		29
Quality food & wine	29	⇩	18
History & heritage	30		30
Affordable to fly to	31	⇩	27

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*

New Zealand's competitive strengths are in how comfortable it feels to people of all cultures and its unique connection to the land; however, there is room to dial up the wide range of experiences on offer from those which are relaxing to those more fun fuelled

Relative brand positioning for top 15 drivers of preference

Total Active Considerers (New Zealand and top five competitors) | Q2 FY23 | Index (see appendix)

Impact on Preference: Higher → Lower

Brand associations	New Zealand	Australia	Switzerland	Singapore	Maldives	France
Escape normal life	101	91	96	107	115	89
Family friendly	102	101	102	91	98	105
Clean & unpolluted	100	101	110	97	90	99
Fun & enjoyment	96	96	107	87	123	92
Unique experiences	101	99	114	82	96	106
Culturally comfortable	108	96	94	90	100	111
Relax & refresh	92	101	103	95	110	104
Safe destination	100	89	95	117	88	112
Landscapes & scenery	94	105	104	115	100	83
Friendly people	97	88	104	111	101	98
Relationship with the land	108	104	95	86	100	105
Covid-19 management	108	113	101	106	86	82
Range of experiences	97	111	84	105	96	111
Easy to travel around	97	101	101	115	87	99
Local culture	100	104	90	98	108	102

Strengths:

- Culturally comfortable
- Relationship with the land
- Covid-19 management

Need to dial up:

- Relax and refresh
- Landscapes and scenery
- Range of experiences

1. Only top drivers are reported by rank as reported in Preference Driver Analysis 2022
2. Question "Which destinations, if any, do you associate with this statement?"

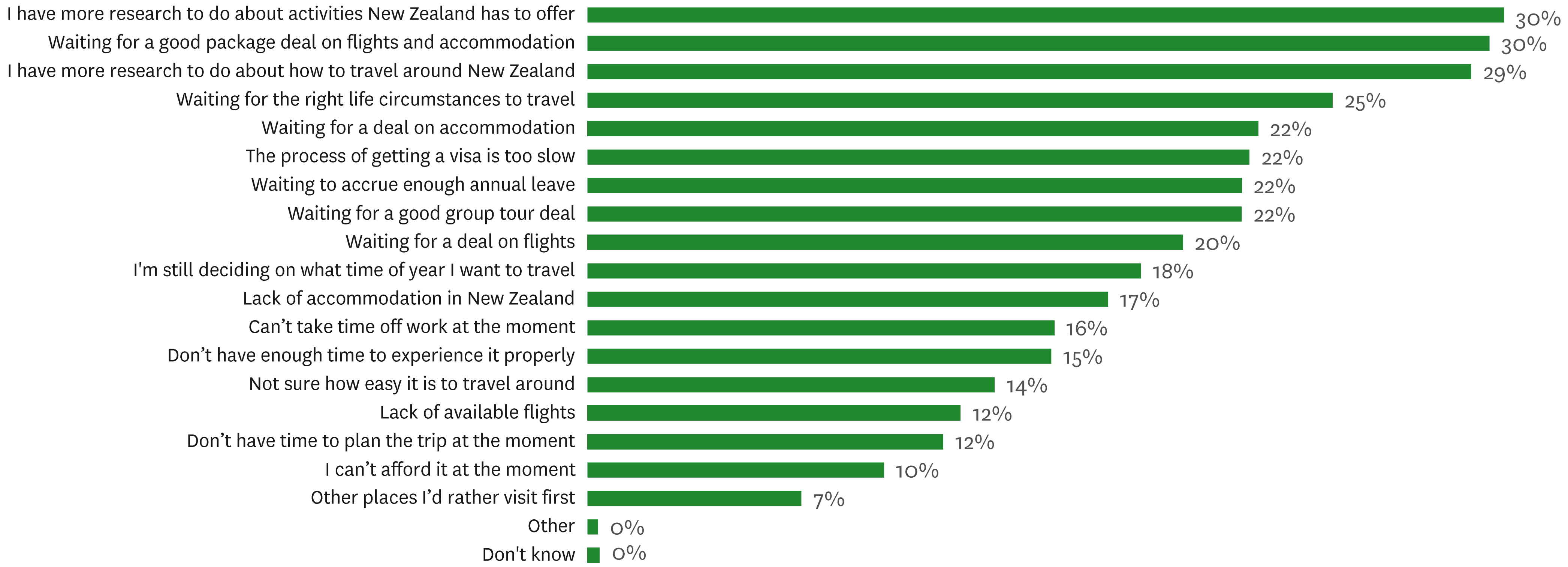
Relative weakness | 100 | *Relative strength*

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

Highlighting deals on flights and accommodation, activities on offer and the ease of travelling around New Zealand will help motivate ACs to book their holiday

Barriers to making a booking

% Active Considerers | Q2 FY23

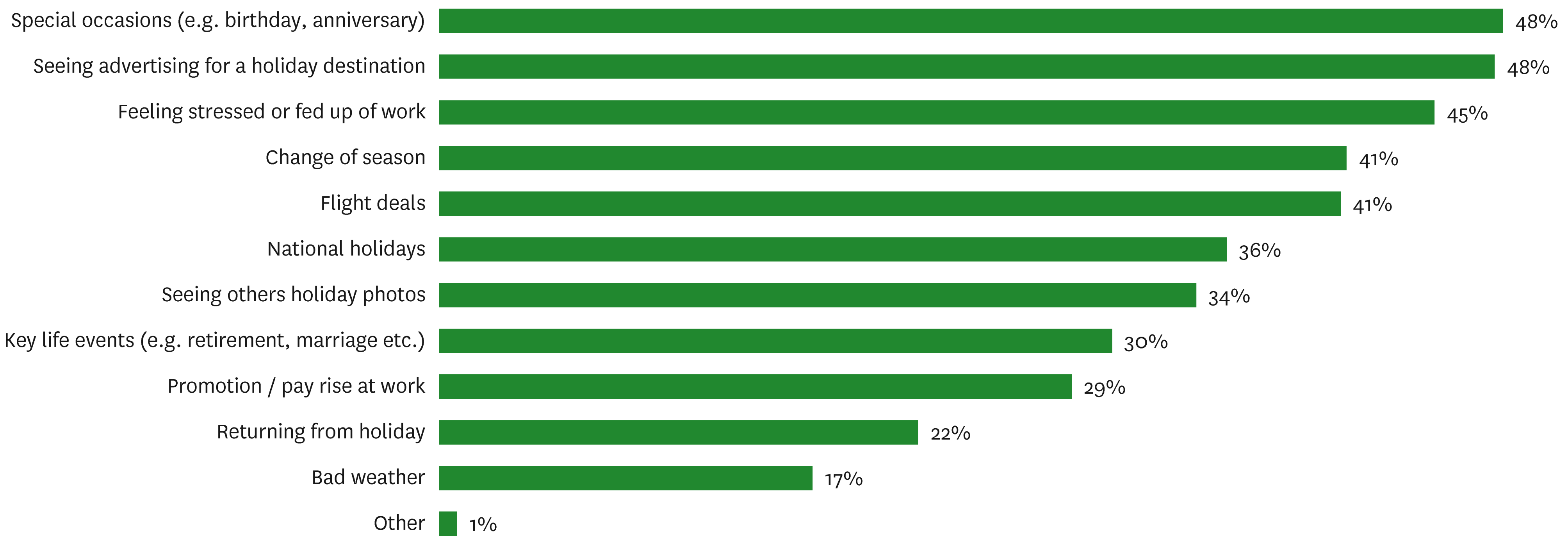


Sample size: n =215 (Among those who have not made non-refundable bookings)
Q "What is stopping you from making a booking?"

Special occasions and feeling stressed at work are key moments in which ACs think about taking a holiday – messaging can capture this mindset by highlighting New Zealand as perfect to relax in and forget about the stresses of the world

Triggers to take an overseas holiday

% Active Considerers | Q2 FY23

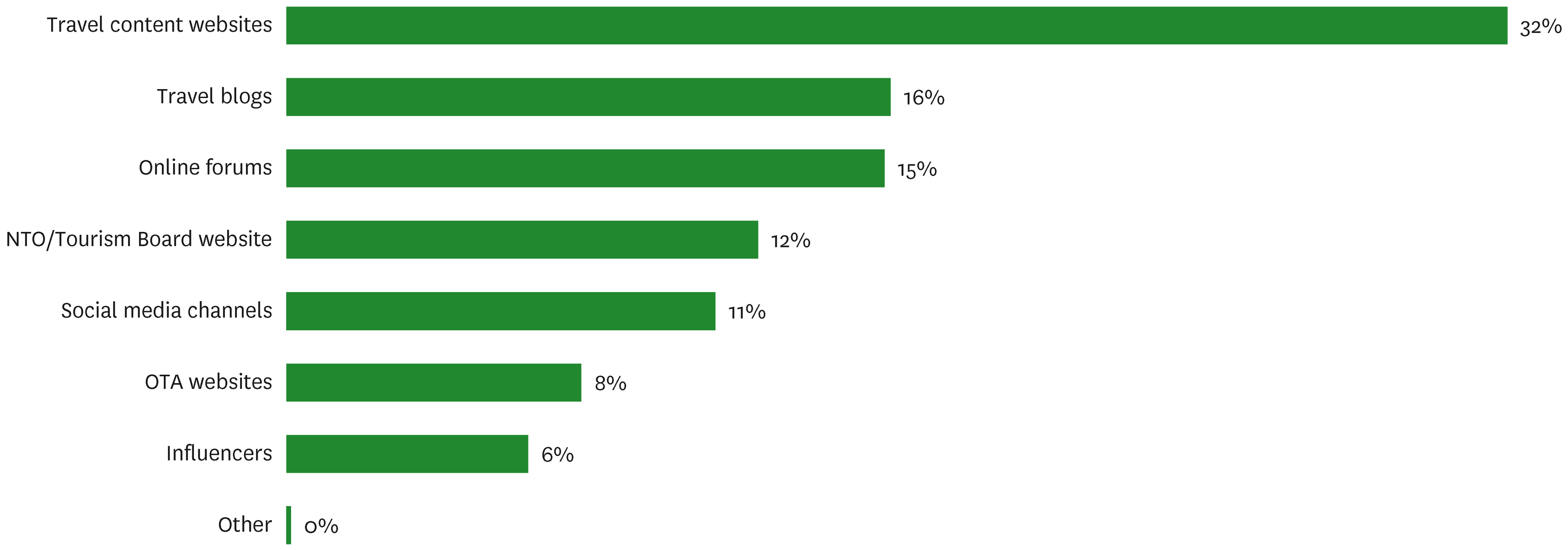


Sample size: n = 300
Q "Which of the following have prompted you to take an overseas holiday?"

Travel content websites are the most common channels used by Indian ACs when planning an overseas holiday – consider leveraging these sites to help drive conversion to firm bookings

Websites / channels likely to be used when planning a long-haul holiday

% Active Considerers | Q2 FY23

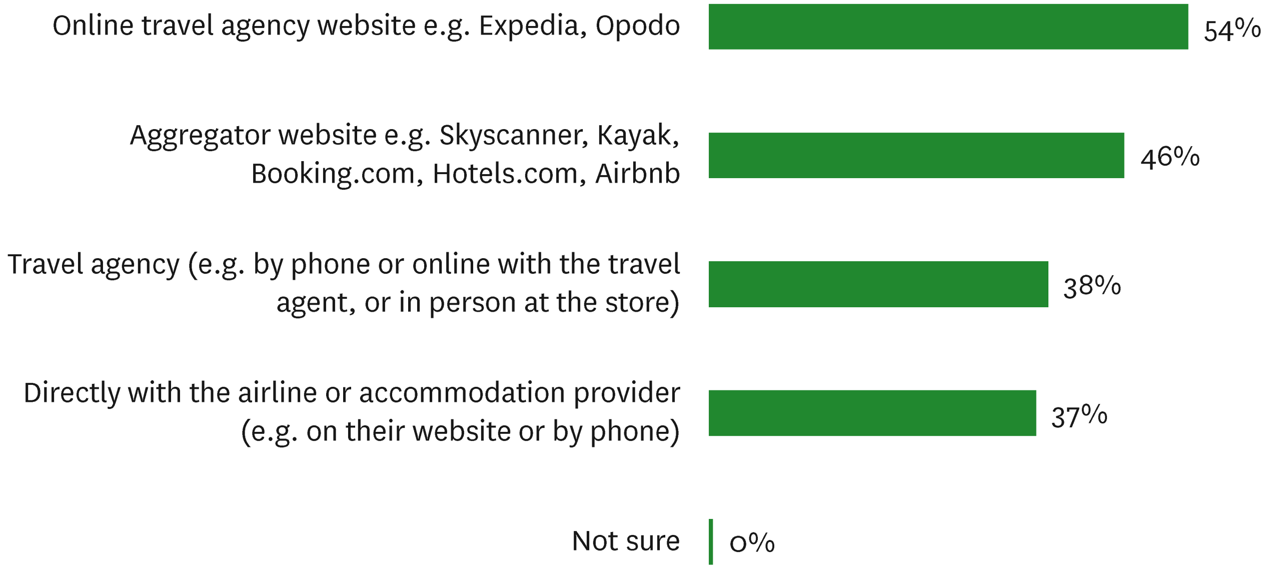


Sample size: n = 300
Q "Which of these websites or channels would you most likely use while planning a long-haul holiday?"
Long haul is defined as 6 hours or more

Online travel agency websites and aggregator websites should be considered for trade partnerships as they are popular channels to book through

Preferred channels to book a long-haul holiday

% Active Considerers | Q2 FY23

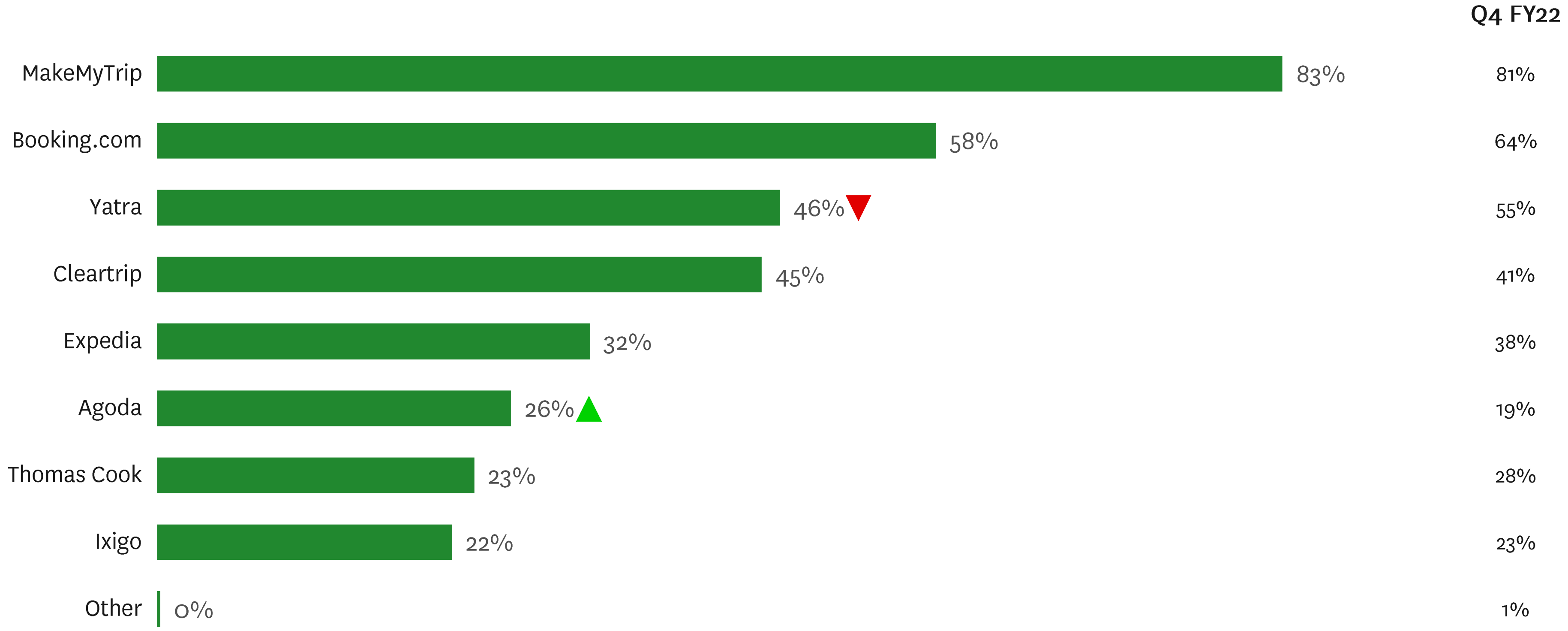


Sample size: n = 300
Q "Which of the following would you most likely use to book a long-haul holiday?"
Long haul is defined as 6 hours or more

MakeMyTrip represents an opportunistic website to partner with as it is the most preferred website among ACs to book long-haul holidays

Preferred websites to book next long-haul holiday

% Active Considerers | Q2 FY23



Significantly higher / lower than previous wave at 95%

Sample sizes: Q4 FY22 n = 300; Q2 FY23 n = 300
Q "Which of these websites do would you prefer to book your next long-haul holiday?"
Long haul is defined as 6 hours or more

SOUTH KOREA


CANADA
USA
UK
GERMANY
CHINA
JAPAN
INDIA
SINGAPORE
AUSTRALIA
NEW ZEALAND

Active Considerer journey funnel – South Korea

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 (₩2m per person on a holiday to New Zealand)

Online population, 18-74 years of age (35.6m)

57%

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

20.4m

52%

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

10.5m

96%

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

10.1m

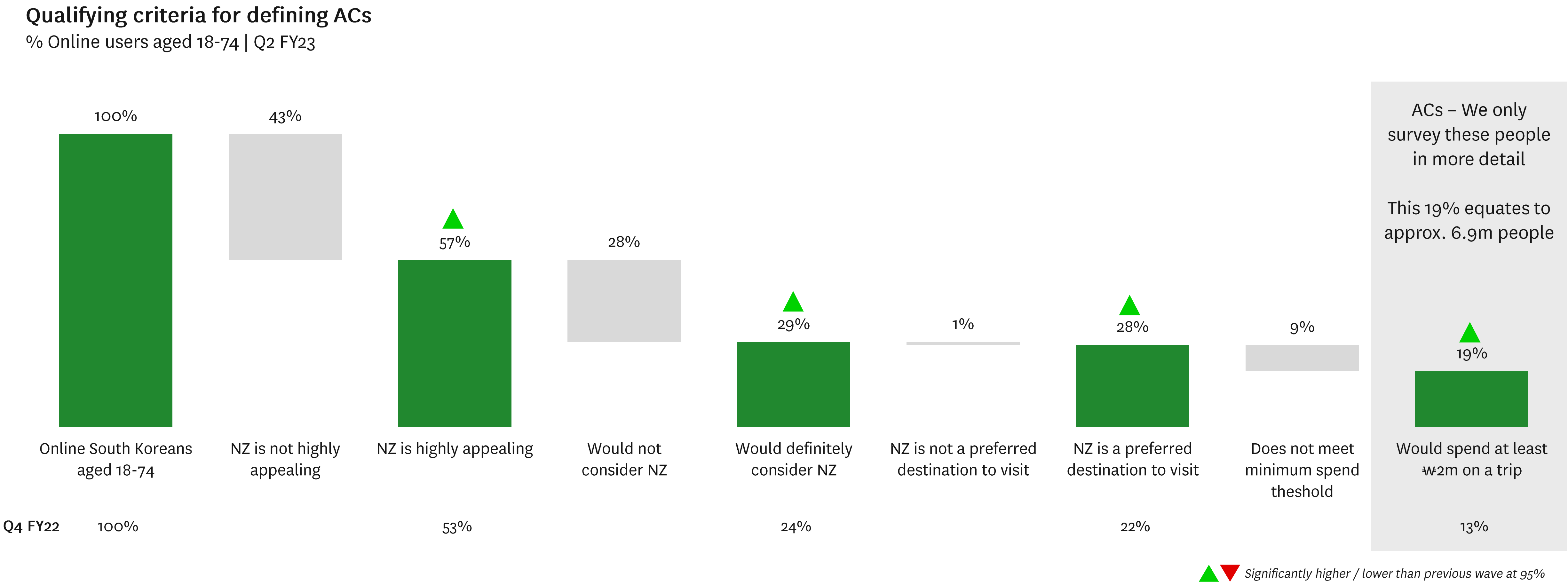
69%

Willing to spend at least ₩2m per person on a holiday to New Zealand[1]

6.9m

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

The size of the opportunity in South Korea is growing, with the AC incidence increasing to 19% in late 2022 (approx. 6.9M people)

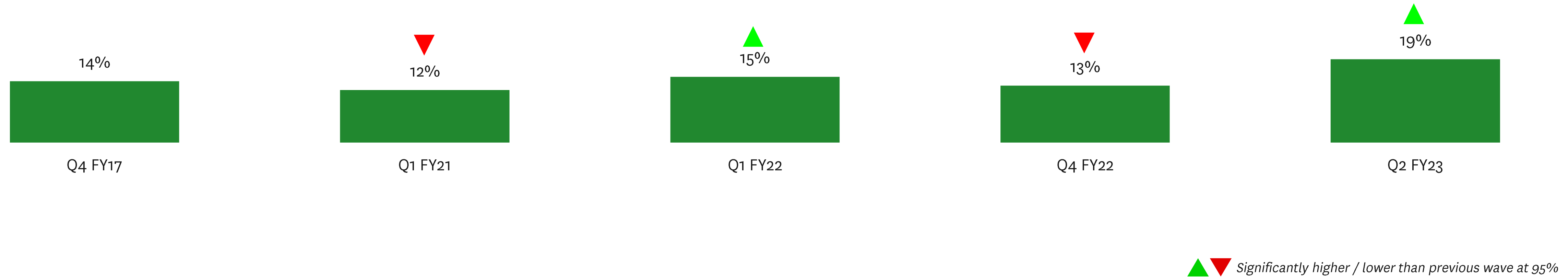


Sample size: Q4 FY22 n = 3,977 | Q2 FY23 n = 3,147

The incidence of ACs in South Korea is showing an upward trend over time, now at the highest level seen since mid 2021.

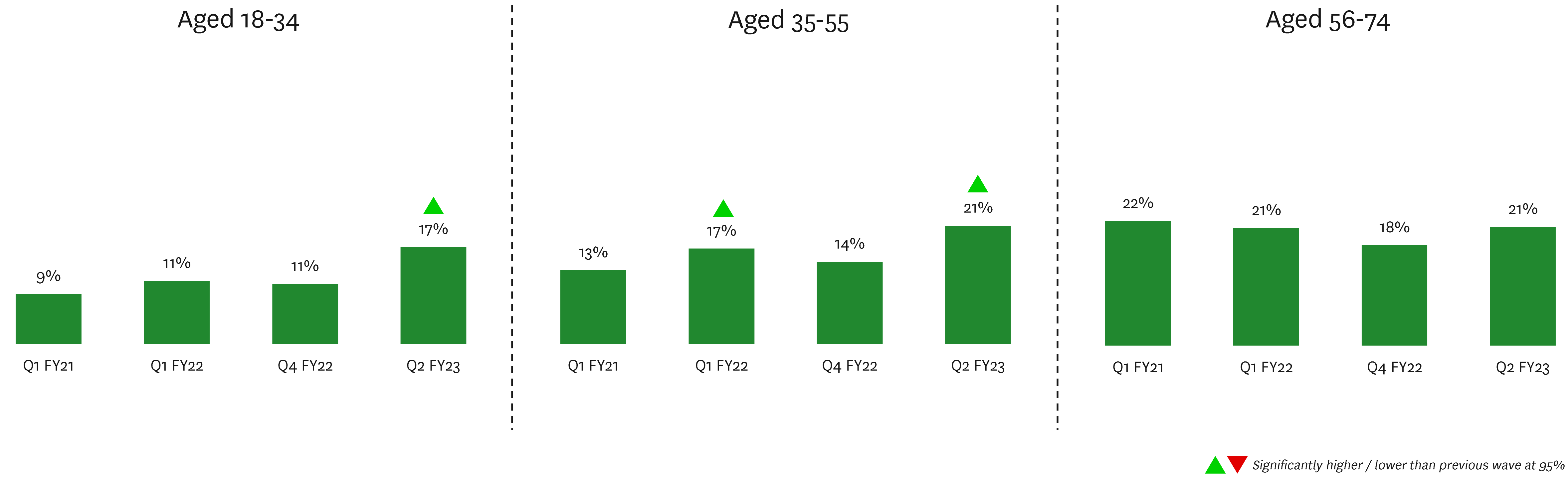
Incidence of ACs

% Online users aged 18-74 | Over time



The significant uplifts in AC incidence are seen amongst those aged 18 – 55 years

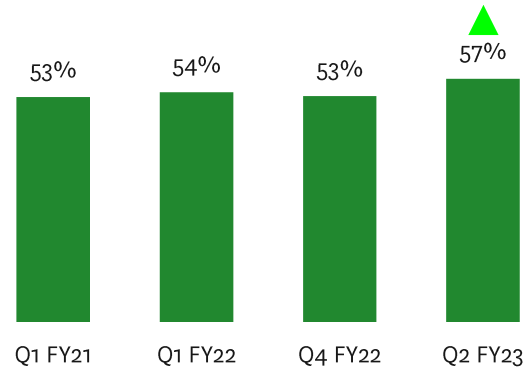
Incidence of ACs
% Online users aged 18-74 | Over time



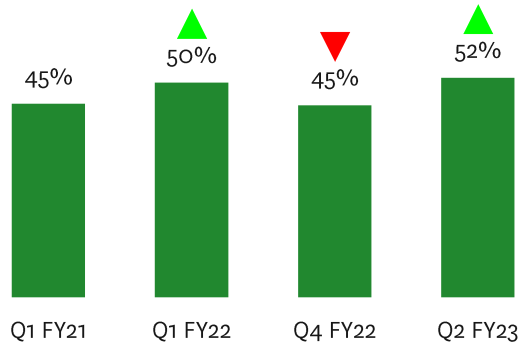
Sample sizes: (Q1 FY21 | Q1 FY22 | Q4 FY22 | Q2 FY23) Aged 18-34 n = 1,705 | 1,505 | 1,881 | 1,330. Aged 35-55 n = 2,262 | 1,134 | 1767 | 1,481 . Aged 56 – 74 n = 263 | 216 | 329 | 336

Appeal, consideration, preference for New Zealand and willingness to spend at least ₩2M have all increased in Q2 FY23, resulting in a growing incidence of ACs

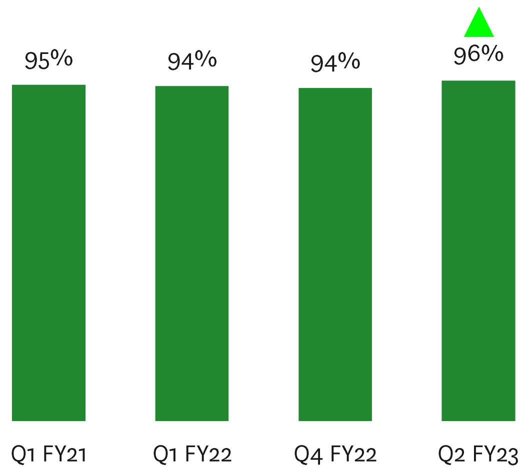
Appeal of New Zealand (%8-10)
% Online users aged 18-74 | Q2 FY23



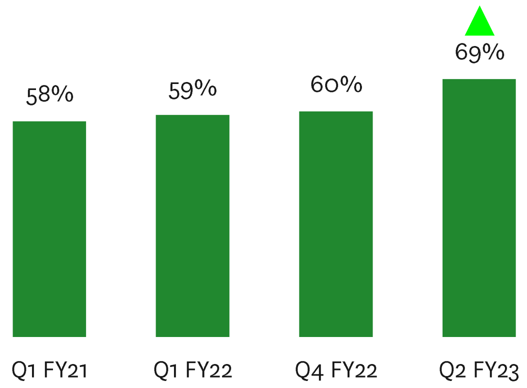
Consideration of New Zealand (%8-10)
% Those who find NZ appealing | Q2 FY23



Preference of New Zealand (%4-5)
% Those who would consider visiting | Q2 FY23



Anticipated spend on holiday in New Zealand (>2Million Won)
% Those who agree NZ is a preferred holiday destination | Q2 FY23



Significantly higher / lower than previous wave at 95%

Sample sizes: Q1 FY21 | Q1 FY22 | Q4 FY22 | Q2 FY23. Appeal n = 4,230 | 2,855 | 3,977 | 3,147 Consider n = 2,159 | 1,463 | 2,030 | 1,688
Preference n = 974 | 749 | 909 | 802 Spend n = 914 | 696 | 844 | 755
Q "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"
Q "Would you consider visiting New Zealand for a holiday within the next three years?"
Q "To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"

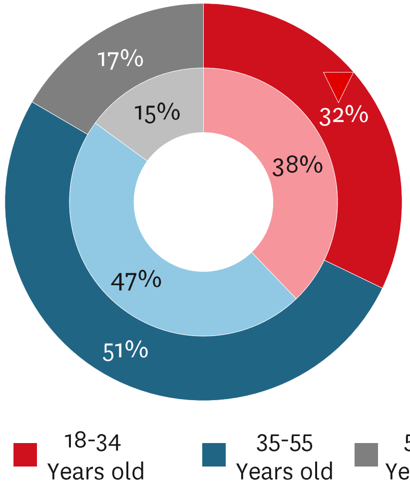
South Korean ACs are more likely to be male and concentrated in Seoul and Gyeonggi; the global priority mindsets, Experienced Connectors and Vibrant Adventurers, make up 23% of the AC pool

Profile of AC segments

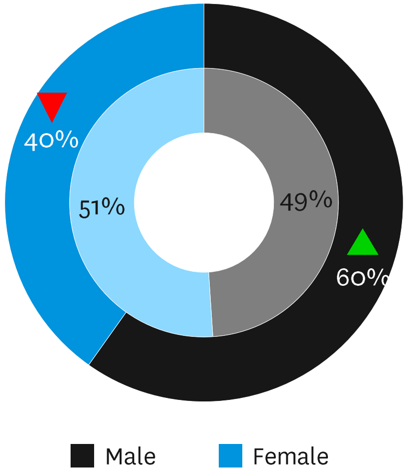
% Active Considerers | % Non-AC

Outer ring: South Korean Active Considerers
Inner ring : South Korean non-Active Considerers

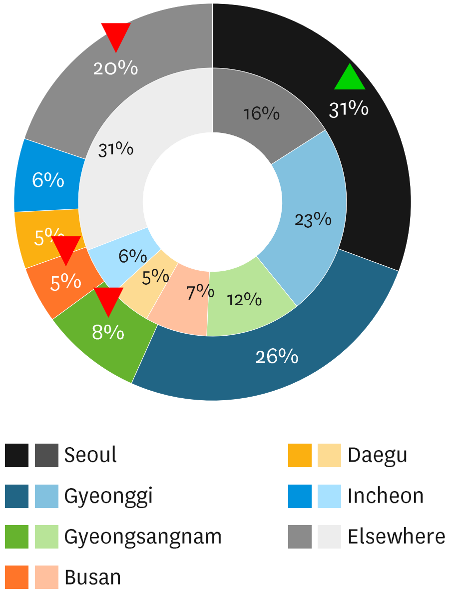
By age segment(1)



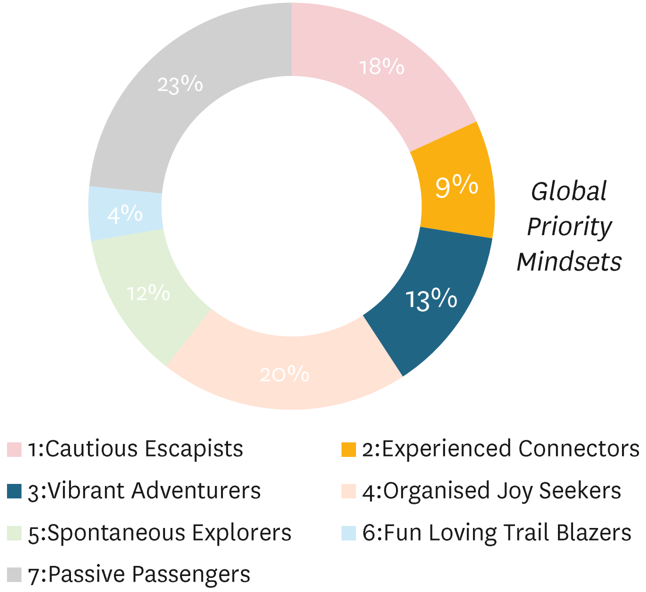
By gender(1)



By region(1)



By Mindset(2)

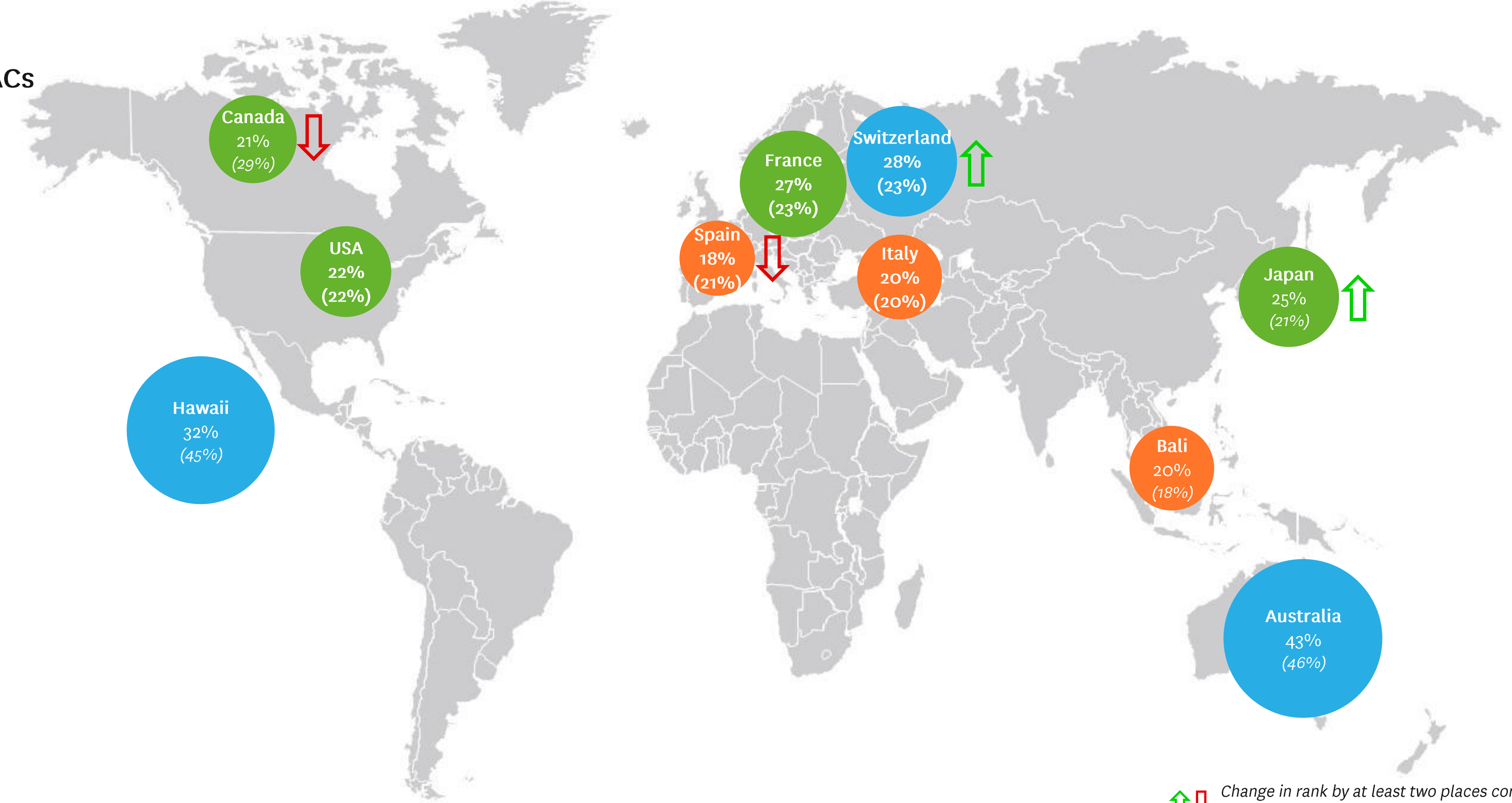


Significantly higher / lower than non AC's

New Zealand's competitive set remains unchanged with Australia and Hawaii being the top two competitors for South Korean ACs

Top ten competitor set for ACs

% Active Considerers | Q2 FY23

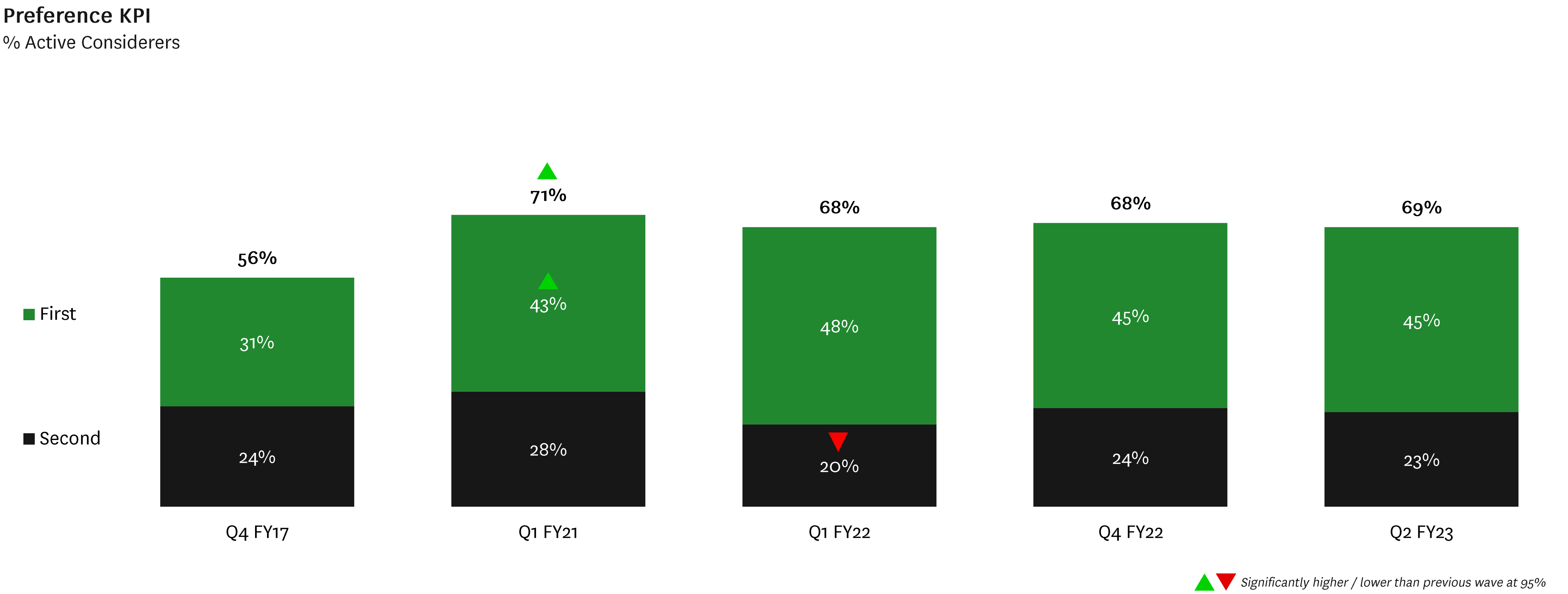


Legend
- Top 3
- Rank 4-7
- Rank 8-10

Change in rank by at least two places compared to previous wave

Sample size Q4 FY22 n = 300, Q2 FY23 n = 300
% selected destination in their top five preferred destinations
Q "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"

Preference for New Zealand has remained strong since the uplift seen in the first fiscal quarter of 2021 (July – September 2021).



Sample sizes: ACs Q4 FY17 n = 500, Q1 FY21 n = 301, Q1 FY22 n = 300, Q4 FY22 n = 300, Q2 FY23 n = 300
Q "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

Preference for New Zealand is similar among priority and non-priority mindsets

Preference KPI

% Priority mindset group I Non-priority group I Q2 FY23

Context to preference drivers

- When it comes to choosing a travel destination, not all factors are equally important. We use a method called Jaccard's analysis to estimate which destination attributes have most influence over people's preference for New Zealand as a travel destination.

- We also compare New Zealand's performance with performance among competitors (specific to the market) to help us prioritise which areas to focus our marketing efforts on for each of our key markets.

- We typically conduct a brand driver analysis annually for our key markets, the brand driver analysis included in this report is based on the most recent results available: Data from Jan-22 to Dec-22.

Preference for New Zealand is driven by its spectacular and pristine environments, unique experiences and its connection to the land – there is an opportunity to promote these attributes to grow preference

Top 15 drivers of preference for New Zealand

AC Monitor | % | 2022 (May-22 and Oct-22) | Total Active Considerers | Index (see appendix)

Latest results	2022 rank
Landscapes & scenery	1
Clean & unpolluted	2
Escape troubles	3
Wildlife experiences	4
Relationship with the land	5
Unique national parks	6
Family friendly	7
Safe destination	8
Relax & refresh	9
Range of adventure	10
Escape normal life	11
Local culture	12
Covid-19 management	13
Unique experiences	14
All seasons	15

Latest results	2022 rank
Embraces visitors	16
Friendly people	17
Fun & enjoyment	18
Culturally comfortable	19
Iconic attractions	20
Range of experiences	21
Indigenous culture	22
Local experiences	23
Challenging	24
Interesting cities	25
Quality food & wine	26
History & heritage	27
See lots without travelling far	28
Easy to travel around	29
Affordable to fly to	30
Affordable activities	31

New Zealand's competitive strengths are its pristine, unique nature, connection to the land and wildlife experiences; there is however, room to raise New Zealand's profile of being a safe and family friendly destination that offers unique experiences

Relative brand positioning for top 15 drivers of preference

Total Active Considerers (New Zealand and top five competitors) | Q2 FY23 | Index (see appendix)

Impact on Preference: Higher → Lower

Brand associations	New Zealand	Australia	Hawaii	Switzerland	France	Japan
Landscapes & scenery	104	114	100	131	33	69
Clean & unpolluted	113	109	84	131	69	61
Escape troubles	99	79	127	131	89	66
Wildlife experiences	138	157	78	38	76	59
Relationship with the land	107	96	102	73	110	120
Unique national parks	117	123	65	84	89	101
Family friendly	89	89	113	85	131	124
Safe destination	85	100	83	93	105	155
Relax & refresh	105	73	140	105	70	92
Range of adventure	94	106	103	87	119	103
Place to escape	93	90	111	129	78	92
Local culture	90	109	101	59	160	122
Covid-19 management	103	87	77	112	106	125
Unique experiences	88	92	92	120	154	92
All seasons	90	83	118	106	102	114

Strengths:

- Clean & unpolluted
- Wildlife experiences
- Relationship with the land
- Unique national parks

Need to dial up:

- Family friendly
- Safe destination
- Local culture
- Unique experiences
- All seasons

1. Only top drivers are reported by rank as reported in Preference Driver Analysis 2022
2. Question "Which destinations, if any, do you associate with this statement?"

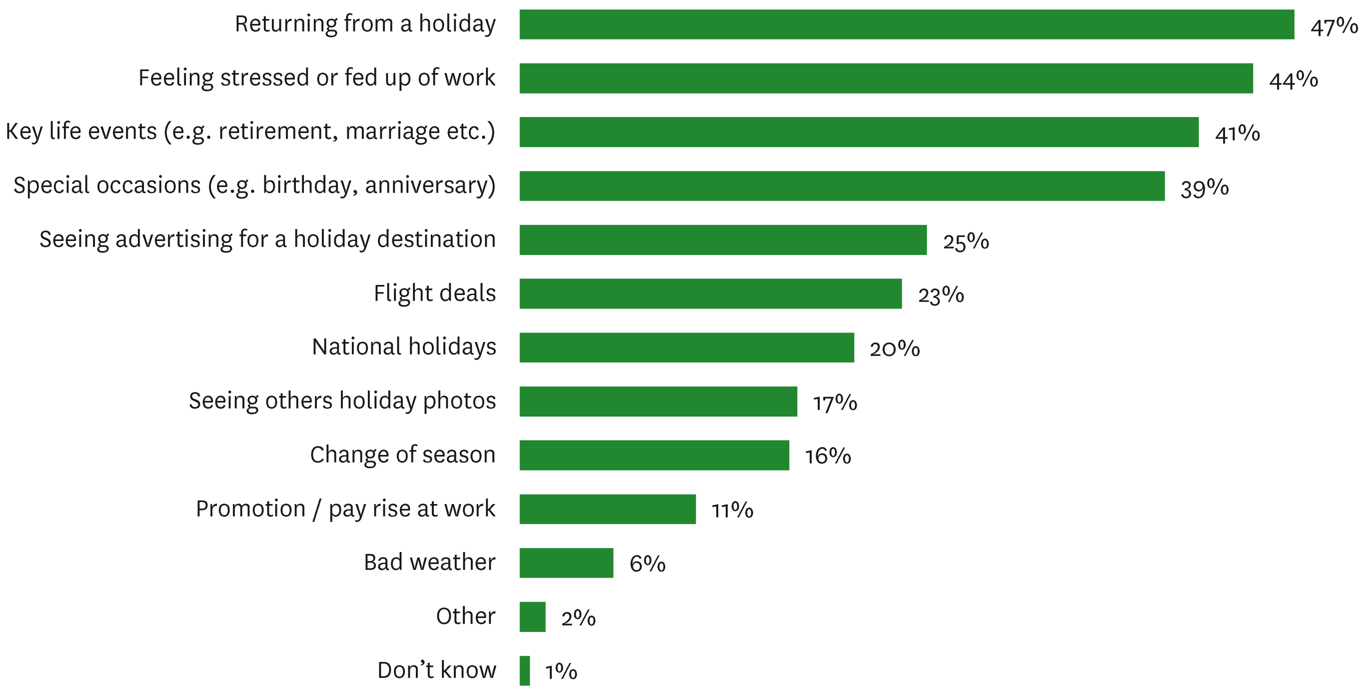
Relative weakness | 100 | *Relative strength*

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

Returning from a holiday and feeling stressed at work are key moments that trigger ACs to think about taking a next holiday – messaging can capture this mindset by highlighting New Zealand as perfect to get away, relax and forget about the stresses of the world

Triggers to take overseas holiday

% Active Considerers | Q2 FY23

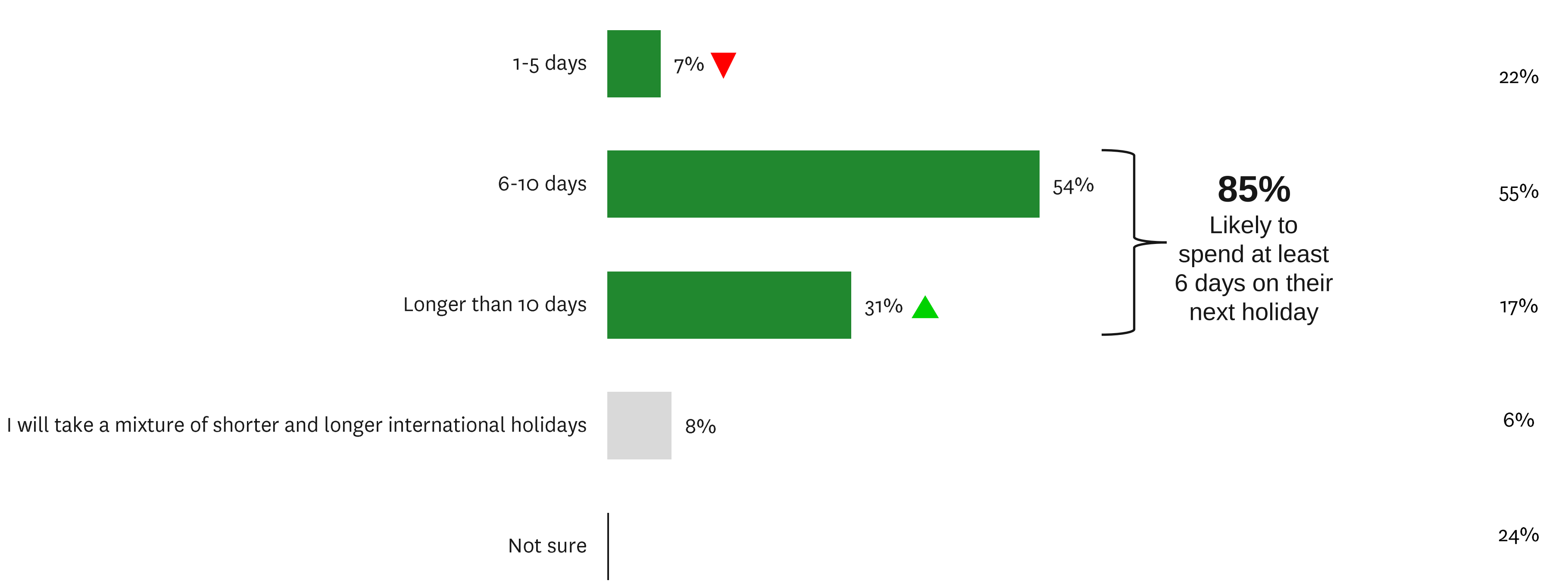


Sample size: Q2 FY23 n = 300
Q: "Which of the following have prompted you to take an overseas holiday?"

South Korean ACs desire longer overseas holidays, with 31% seeing themselves spending 10 days or longer on upcoming overseas trips

Intended duration of international holidays over the next 2 years

% Active Considerers | Q2 FY23



39% of Global Priority Mindsets are looking to stay longer than 10 days (up from 17% in Q4 FY22)

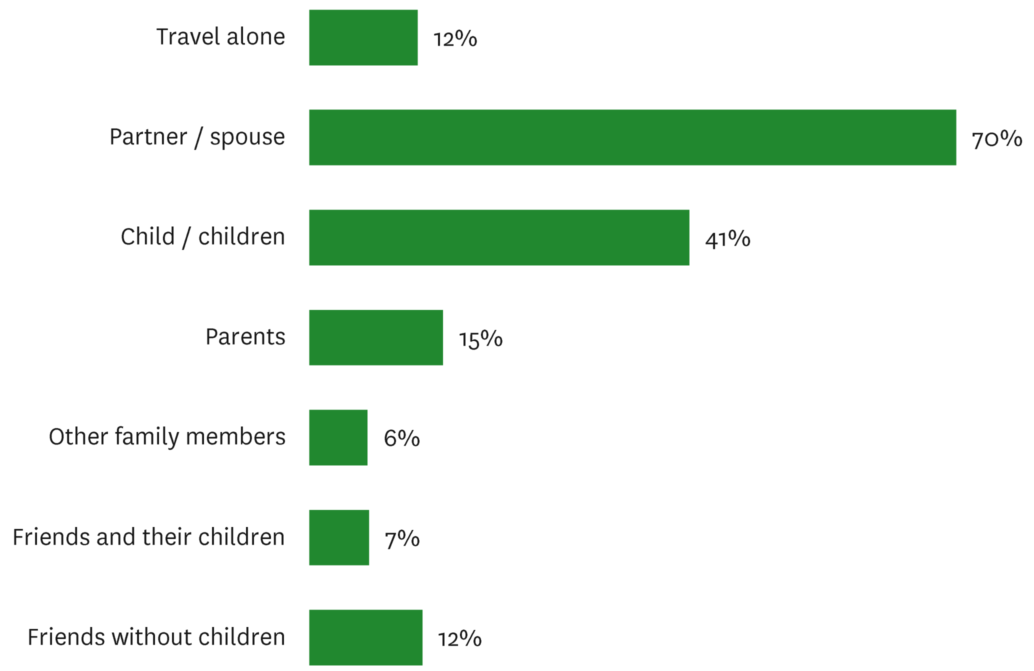
Significantly higher / lower than previous wave at 95%

Sample size: Q4 FY22 n = 300 | Q2 FY23 n = 300
Q: "Thinking about the international holidays you might take over the next 2 years, on average how long do you think each of your holidays will be?"
Global Priority Mindsets are Experienced Connectors and Vibrant Adventurers

South Korean ACs are likely to travel with others when taking a long-haul holiday, most commonly a partner and, in many cases, children – messaging should focus on travel with close family

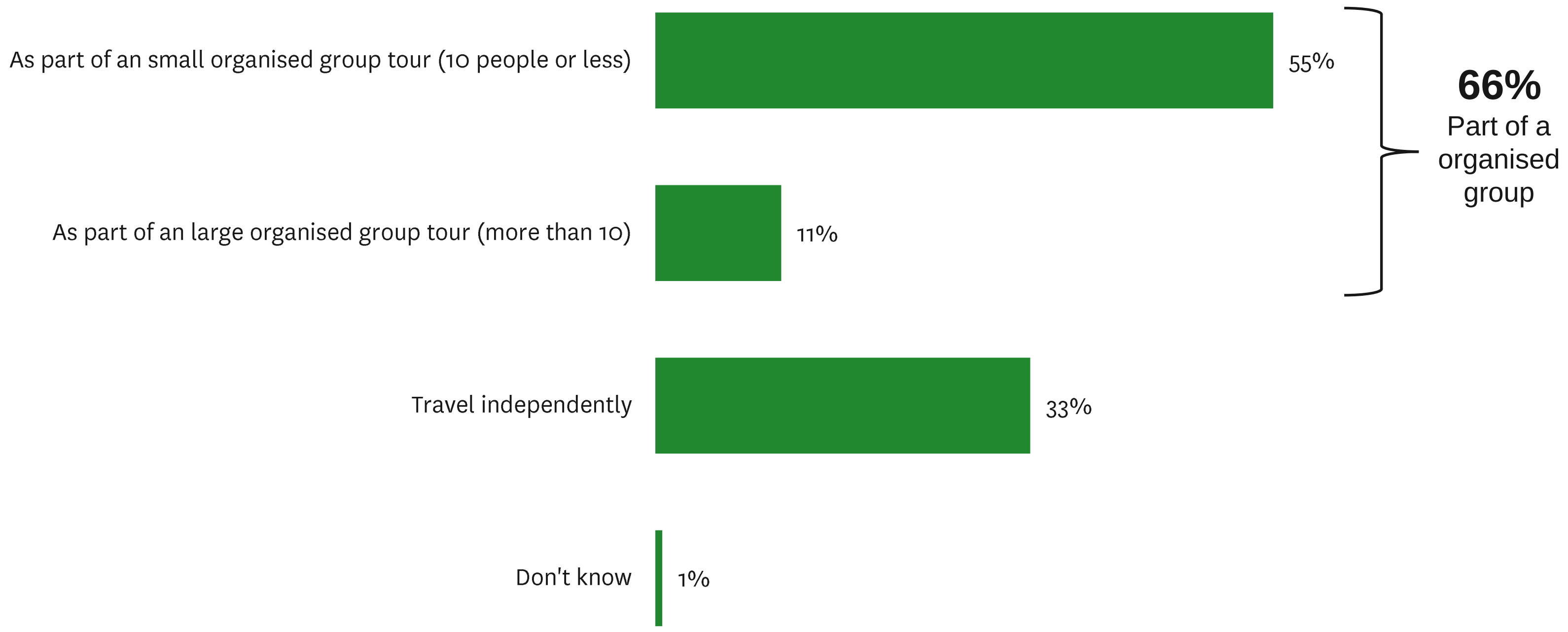
Travel party for long haul overseas holiday

% Active Considerers | Q2 FY23



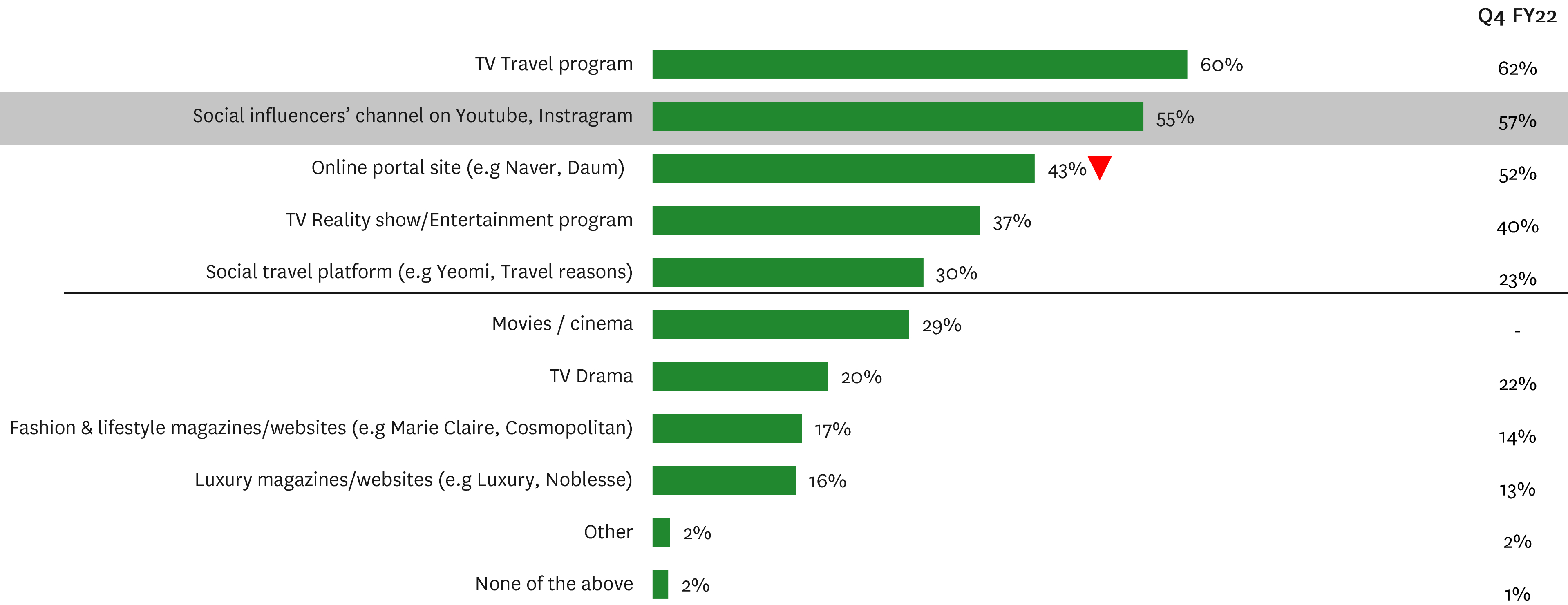
A small group tour is the most popular way to experience an overseas holiday; only a third of ACs prefer independent travel

Overseas travel preference
% Active Considerers | Q2 FY23



ACs get travel inspiration from a wide range of channels, with TV travel programmes and social media influencers offering the best opportunity for TNZ to reach a large proportion of ACs

Channels that influence consideration of a travel destination
% Active Considerers | Q2 FY23



Influencers mentioned (unprompted):

Top two:
-빠니보틀 Pani Bottle
-곽튜브KWAKTUBE

Other mentioned:
-여미 YEOMI
-Joe튜브
-민조엥 minjoeng
-영국남자 Korean Englishman
-브루스리tv
-마이리얼트립

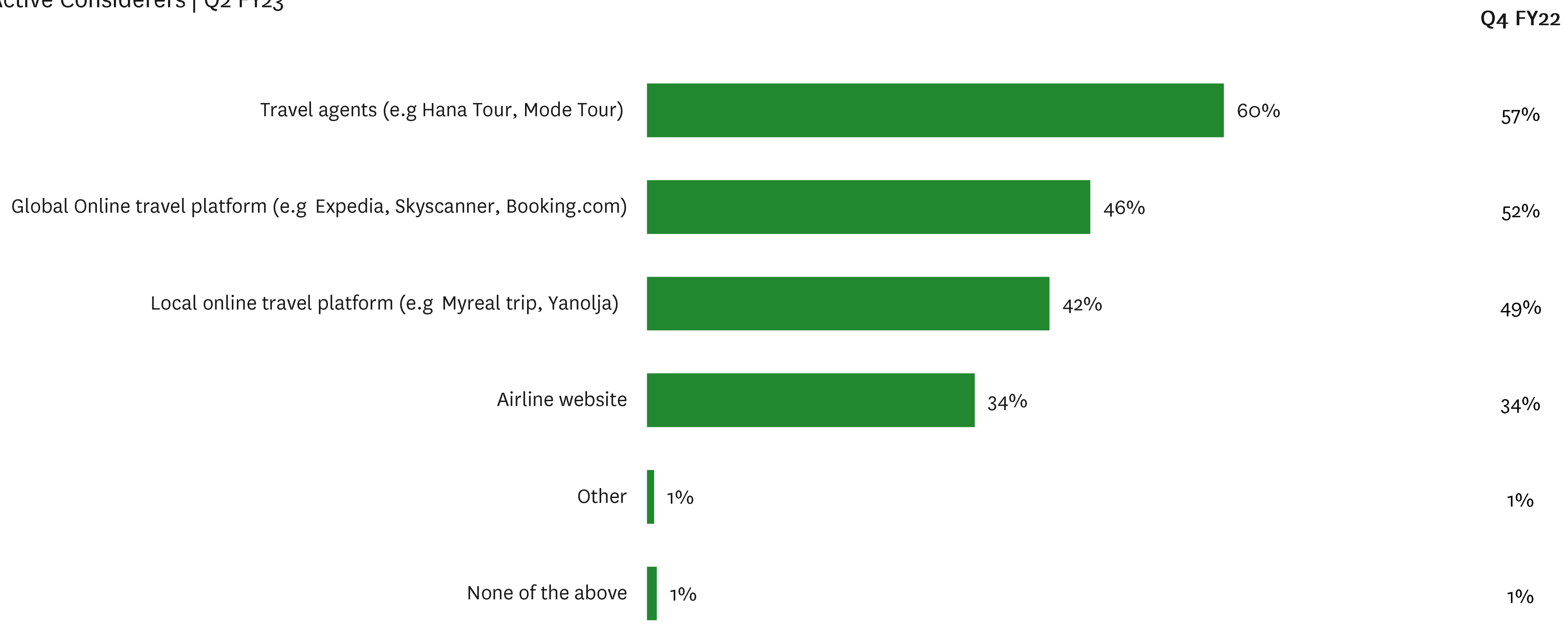
Significantly higher / lower than previous wave at 95%

Sample size: Q4 FY22 n = 300 | Q2 FY23 n = 300
Q: "Which of these media channels influences your consideration of a travel destination? "

60% of ACs book their overseas travel via travel agents, but online travel aggregators are also commonly used – thus, any of these channels could offer good opportunities for trade partnership

Preferred channels used for booking travel

% Active Considerers | Q2 FY23



Significantly higher / lower than previous wave at 95%

Sample size: Q4 FY22 n = 300 | Q2 FY23 n = 300
Q: "Which of the below are your preferred channels to book an international holiday?"

SINGAPORE


CANADA
USA
UK
GERMANY
CHINA
JAPAN
SOUTH KOREA
INDIA
AUSTRALIA
NEW ZEALAND

Active Considerer journey funnel – Singapore

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 (S$2500per person on a holiday to New Zealand)

Online population, 18-74 years of age[1] (2.7m)

58%

Find New Zealand highly appealing as a holiday destination, and... 1.5m

74%

Would seriously consider visiting in the next three years, and... 1.1m

94%

New Zealand is a preferred destination for their next holiday, and... 1.1m

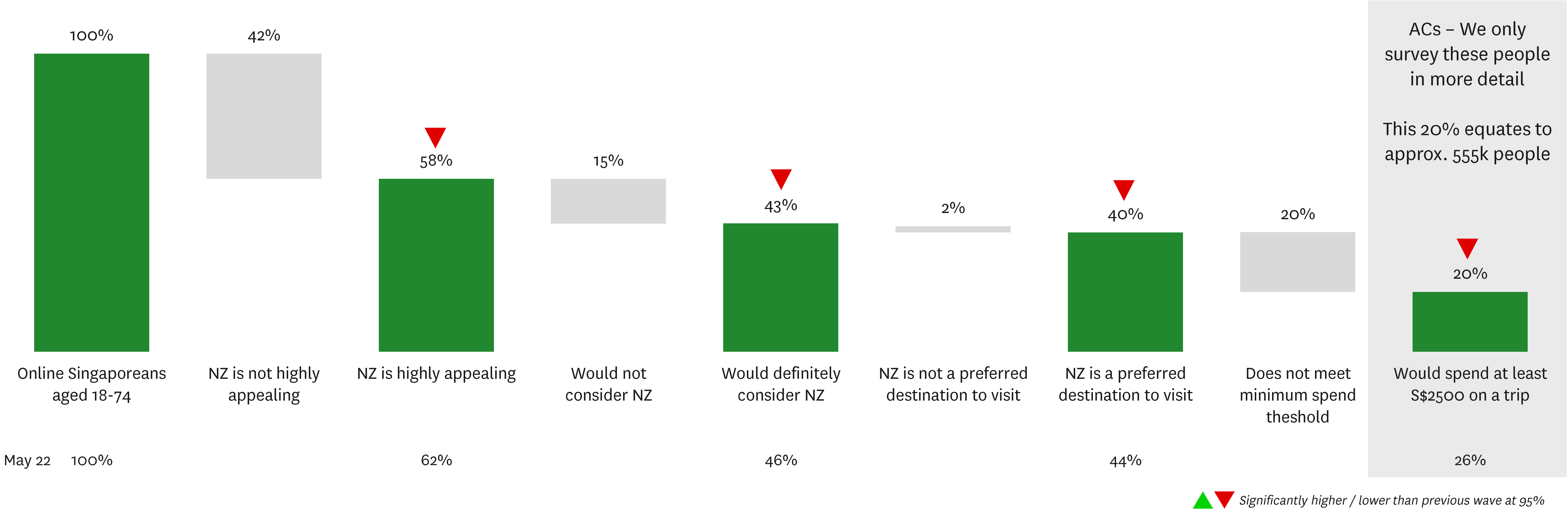
52%

Willing to spend at S$2500 per person on a holiday to New Zealand[2] 0.6m

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

Singapore is a compelling market for TNZ with the AC incidence of 20%, equating to approximately half a million people

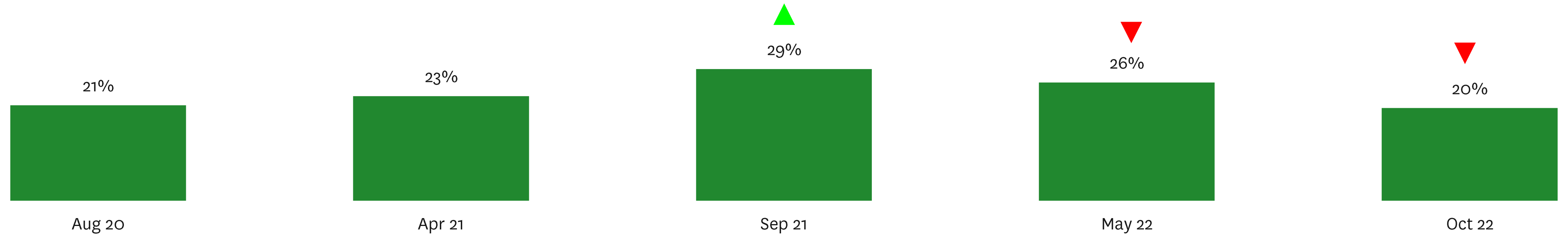
Qualifying criteria for defining ACs
% Online users aged 18-74 | Oct 22



Following a peak in September 2021, the incidence of ACs has been shifting back to levels seen two years ago

Incidence of ACs

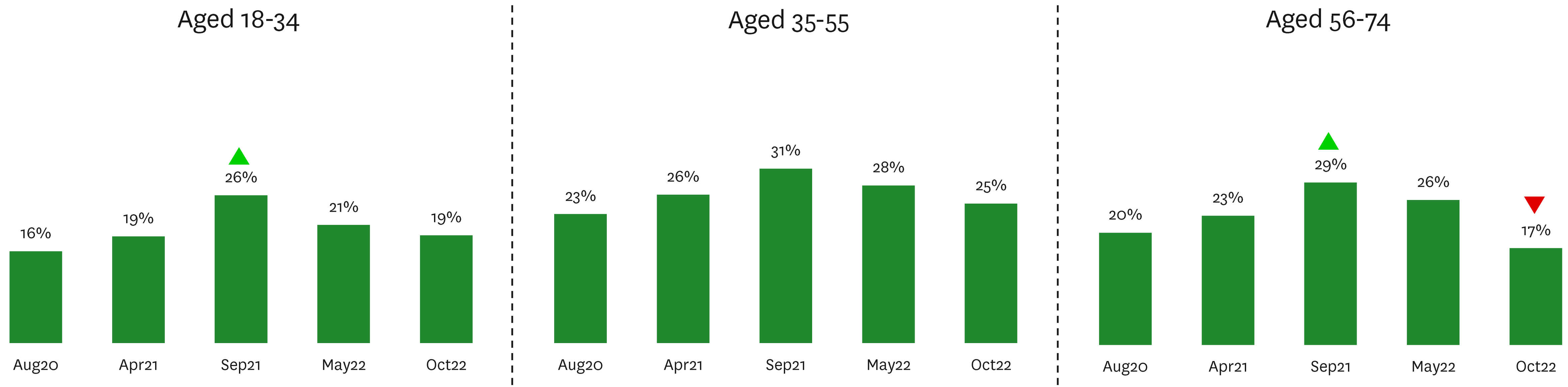
% Online users aged 18-74 | Over time



Significantly higher / lower than previous wave at 95%

We can see the overall pattern of incidence over time mirrored across all age groups, but the decline in incidence in this wave is most notable among the older cohort

Incidence of ACs
% Online users aged 18-74 | Over time

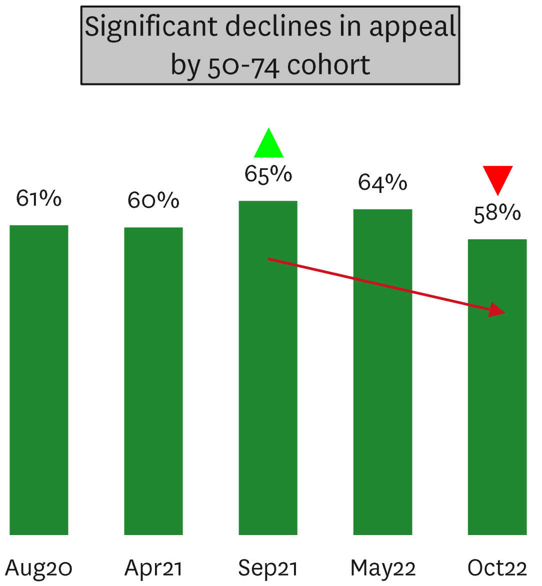


Significantly higher / lower than previous wave at 95%

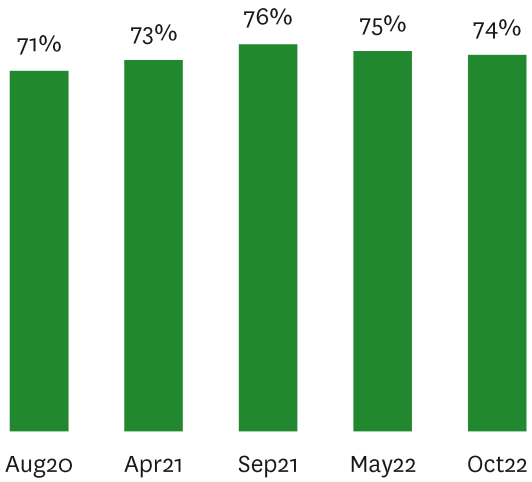
Sample sizes: Aug 20, Apr 21, Sep21, May22, Oct22 n = 2139, 1372, 1780, 2,053, 1,617

The most notable downward shifts are in the appeal of New Zealand and in willingness to spend metrics

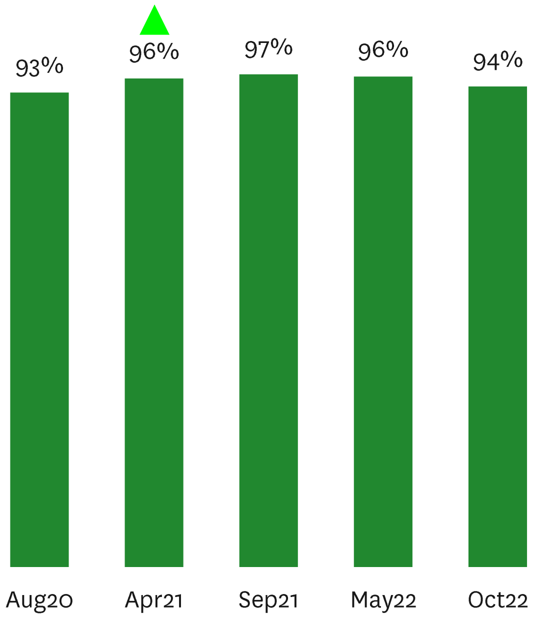
Appeal of New Zealand (%8-10)
% Online users aged 18-74



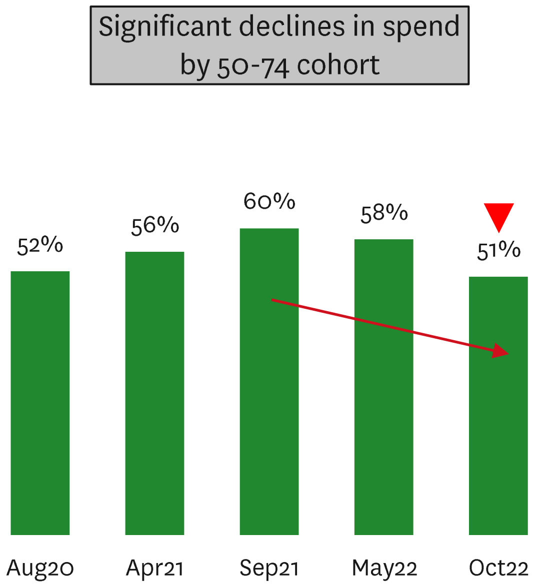
Consideration of New Zealand (%8-10)
% Those who find NZ appealing



Preference of New Zealand (%4-5)
% Those who would consider visiting



Anticipated spend on holiday in New Zealand (>S$2,500)
% Those who agree NZ is a preferred holiday destination



Significantly higher / lower than previous wave at 95%

Sample sizes: Aug 20, Apr 21, Sep21, May22, Oct22. Appeal n = 2139, 1372, 1780, 2,053, 1,617. Consider n = 1,300, 842, 1,170, 1,258, 935. Preference n = 905, 617, 886, 933, 683. Spend n = 841, 586, 853, 893, 641.
Q "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?" Q" Would you consider visiting New Zealand for a holiday within the next three years?"
Q" To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"

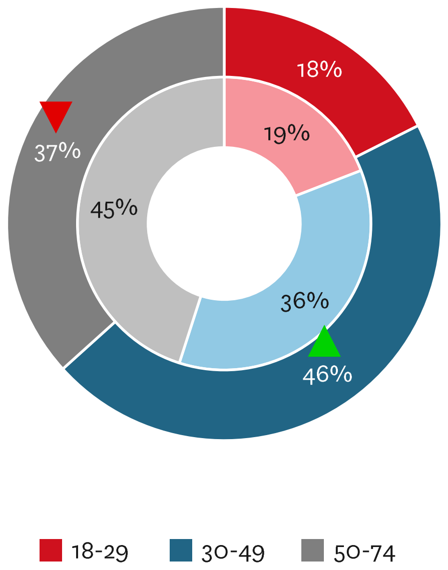
The global priority mindsets, Experienced Connectors and Vibrant Adventurers, make up 24% of Singapore's AC pool

Profile of Active Considerers

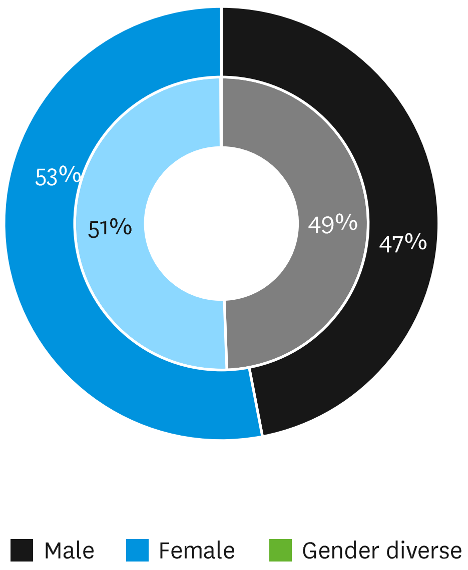
% Active Considerers vs % Non Active Considerers | Oct 22

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

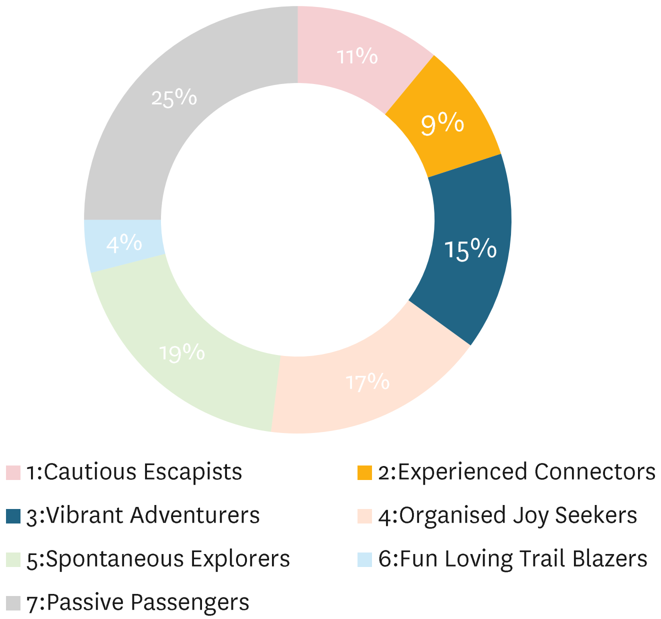
By age segment



By gender



By Mindset

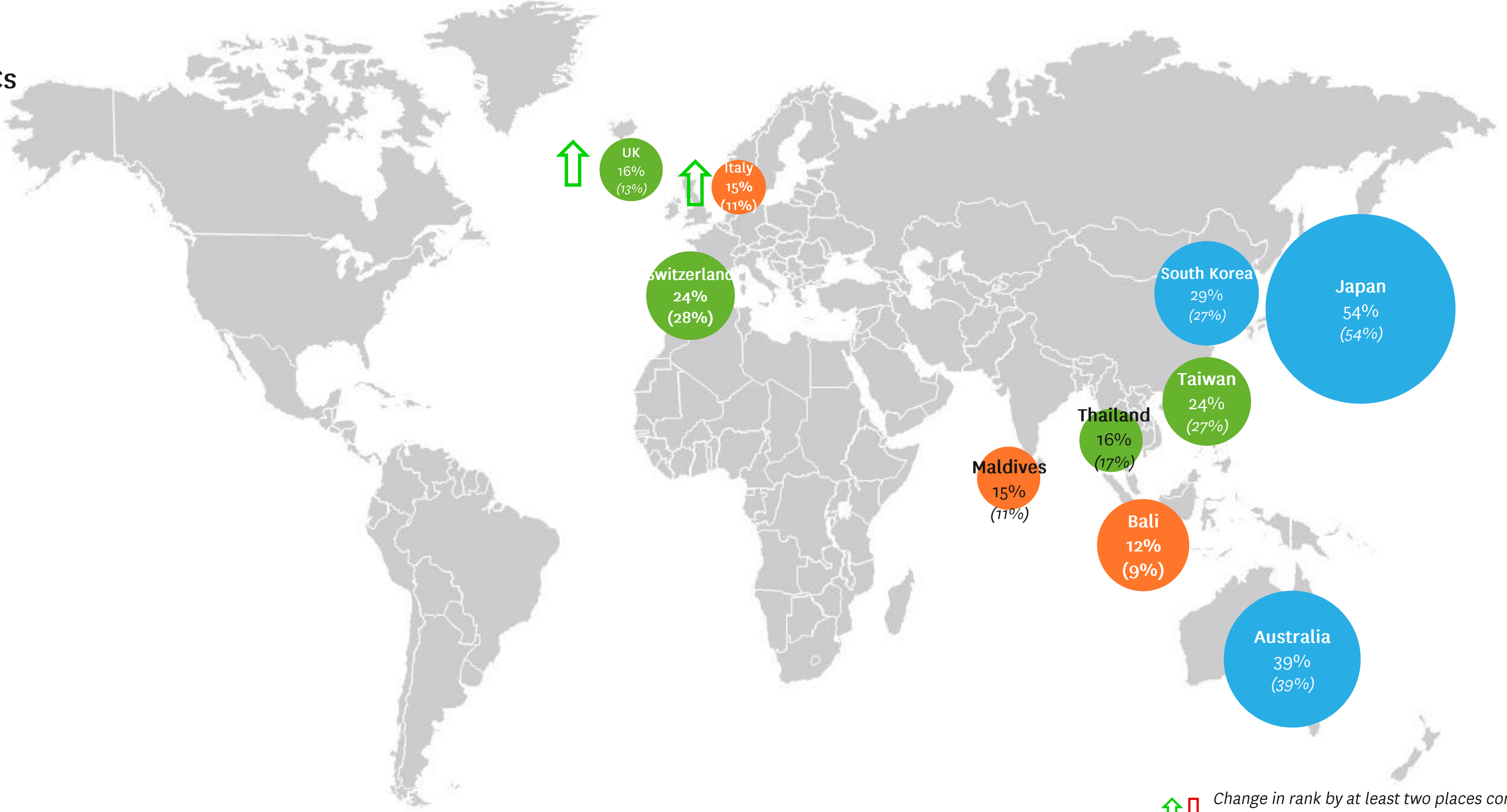


Significantly higher / lower than non AC's

Japan remains New Zealand's top competitor among Singaporean ACs, followed by Australia

Top ten competitor set for ACs

Total Active Considerers | Oct 22



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

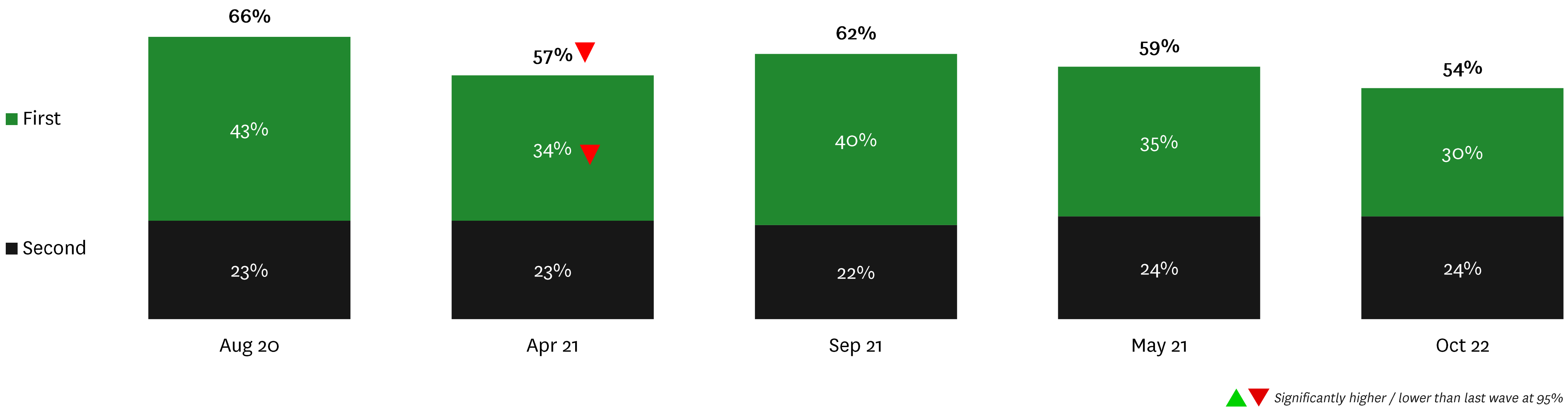
Change in rank by at least two places compared to previous wave

May22 results are in brackets
Sample sizes: May22, Oct22 n = 499, 300
Q "Aside from New Zealand, what other four destinations make up your top five preferred destinations to visit for a holiday?"

Preference for New Zealand has been trending downwards since Sep 2021

Preference KPI

% Active Considerers | Over time



Sample sizes: Total ACs Aug20, Apr21, Sep21, May22, Oct22 n = 403, 300, 500, 499, 300

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

Context to preference drivers

Using Jaccard's analysis, we estimate which destination attributes drive preference for New Zealand and how New Zealand performs relative to its key competitors in order to identify priority attributes to focus on in 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 Jan-22 to Dec-22.

There is an opportunity to promote New Zealand as a safe and family-friendly destination which offers a wide range of experiences as these are key drivers of preference

Top 15 drivers of preference for New Zealand

AC Monitor | % | 2022 (May-22 and Oct-22) | Total Active Considerers

Latest results	2022 rank
Family friendly	1
Clean & unpolluted	2
Unique national parks	3
Safe destination	4
Fun & enjoyment	5
Range of experiences	6
Landscapes & scenery	7
Range of adventure	8
Embraces visitors	9
Culturally comfortable	10
Covid-19 management	11
Unique experiences	12
Relax & refresh	13
Friendly people	14
Escape troubles	15

Latest results	2022 rank
Wildlife experiences	16
Iconic attractions	17
Challenging	18
Indigenous culture	19
Place to escape	20
Local experiences	21
Relationship with the land	22
All seasons	23
Local culture	24
Quality food & wine	25
Interesting cities	26
Easy to travel around	27
History & heritage	28
Affordable activities	29
See lots without travelling far	30
Affordable to fly to	31
Good value for money	32

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

New Zealand stands out for its pristine, spectacular and unique landscapes and being somewhere to relax but there is room to strengthen its positioning on being a welcoming family-friendly destination that offers a range of experiences

Relative brand positioning for top 15 drivers of preference

Total Active Considerers (New Zealand and top five competitors) | Oct-22 | Index (see appendix)

Impact on Preference: Higher → Lower

Brand associations	New Zealand	Japan	Australia	South Korea	Taiwan	Switzerland
Family friendly	98	95	105	118	115	85
Clean & unpolluted	107	103	92	71	74	117
Unique national parks	112	83	112	80	94	80
Safe destination	91	121	95	112	101	98
Fun & enjoyment	91	101	103	120	116	114
Range of experiences	90	108	99	126	112	103
Landscapes & scenery	110	86	98	64	83	127
Range of adventure	111	78	127	73	68	95
Embraces visitors	94	101	108	108	132	81
Culturally comfortable	93	110	98	130	99	91
Covid-19 management	102	99	102	94	95	97
Unique experiences	97	111	87	116	84	114
Relax & refresh	109	89	99	83	89	102
Friendly people	95	123	79	116	140	62
Escape troubles	105	87	97	78	90	134

Strengths:

- Clean & unpolluted
- Unique national parks
- Landscapes & scenery
- Range of adventure
- Relax & refresh

Need to dial up:

- Family-friendly
- Safe destination
- Range of experiences
- Embraces visitors
- Culturally comfortable

KANTAR

1. Only top drivers are reported by rank as reported in Preference Driver Analysis 2022
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

Tactical messages should address common knowledge gaps about the weather and ease of travelling around

Top ten knowledge gaps

Biggest concerns for booking a holiday to New Zealand

% Active Considerers | Oct 22

	What do ACs want to know more about before choosing New Zealand?	Oct '22
1	What the weather is like	48%
2	How easy it is to travel around	41%
3	The length of time required to fly to New Zealand	32%
4	The length of time needed to experience New Zealand properly	31%
5	What practices are in place to keep me safe from Covid (e.g. masks, hand sanitiser etc.)	31%
6	How safe it is from crime	30%
7	What the options are for travelling within New Zealand	27%
8	How welcoming the locals are	26%
9	The range of quality food and beverage options	26%
10	How long it takes to travel between the main attractions	25%

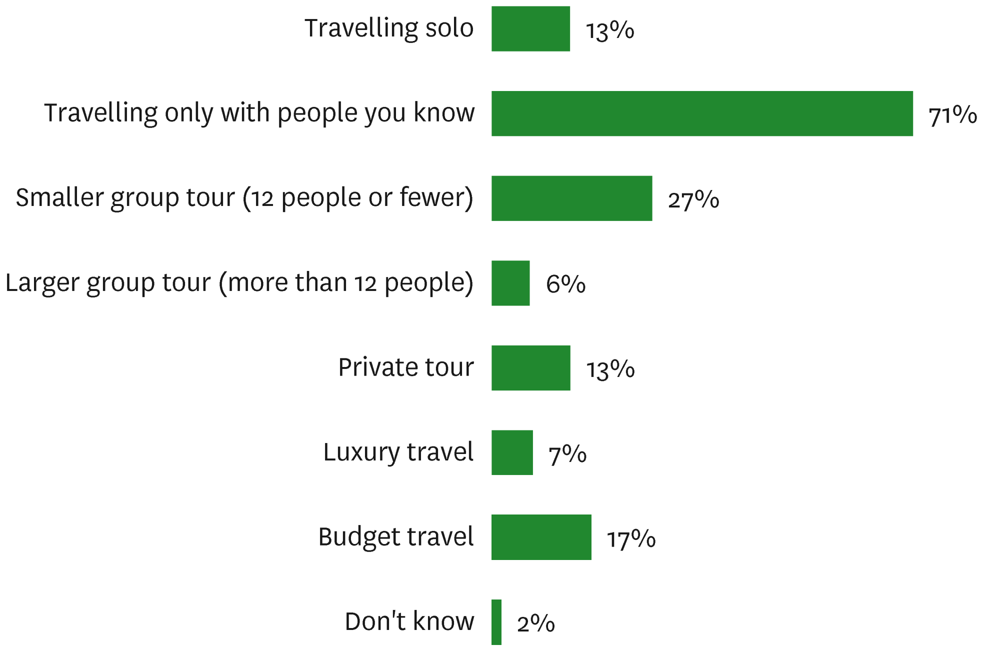
Sample size: Oct 22 n = 300

Q: "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

By far the most popular way Singaporean ACs like to travel is with others they know but there is also sizeable interest in smaller group tours – ensure to depict travelling with others in communications

Interest in type of international holiday

% Active Considerers | Oct 22



KANTAR

Sample size: Oct 22 n = 300

Q "When you take your next overseas holiday, which of the following types of holidays would you be interested

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

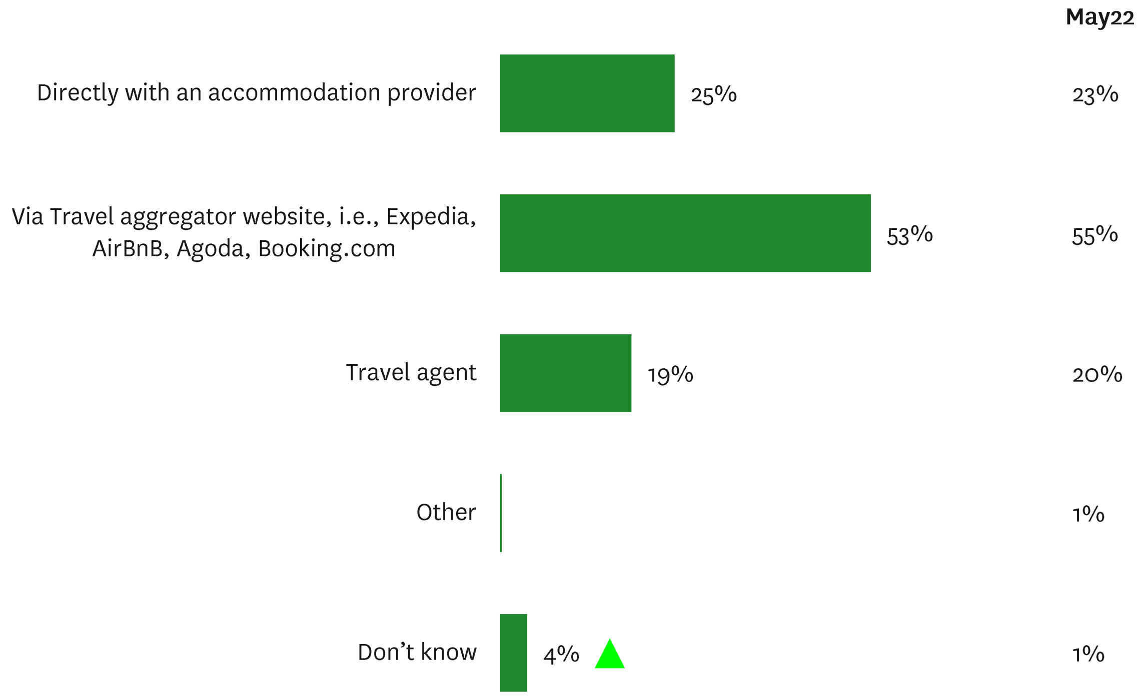
Partnering with airlines and travel aggregator websites is worth considering as the majority of ACs would look to book flights and accommodation for New Zealand via these channels

Preference to book flights to New Zealand

% Active Considerers | Oct 22

Preference to book your accommodation in New Zealand

% Active Considerers | Oct 22



Significantly higher / lower than last wave at 95%

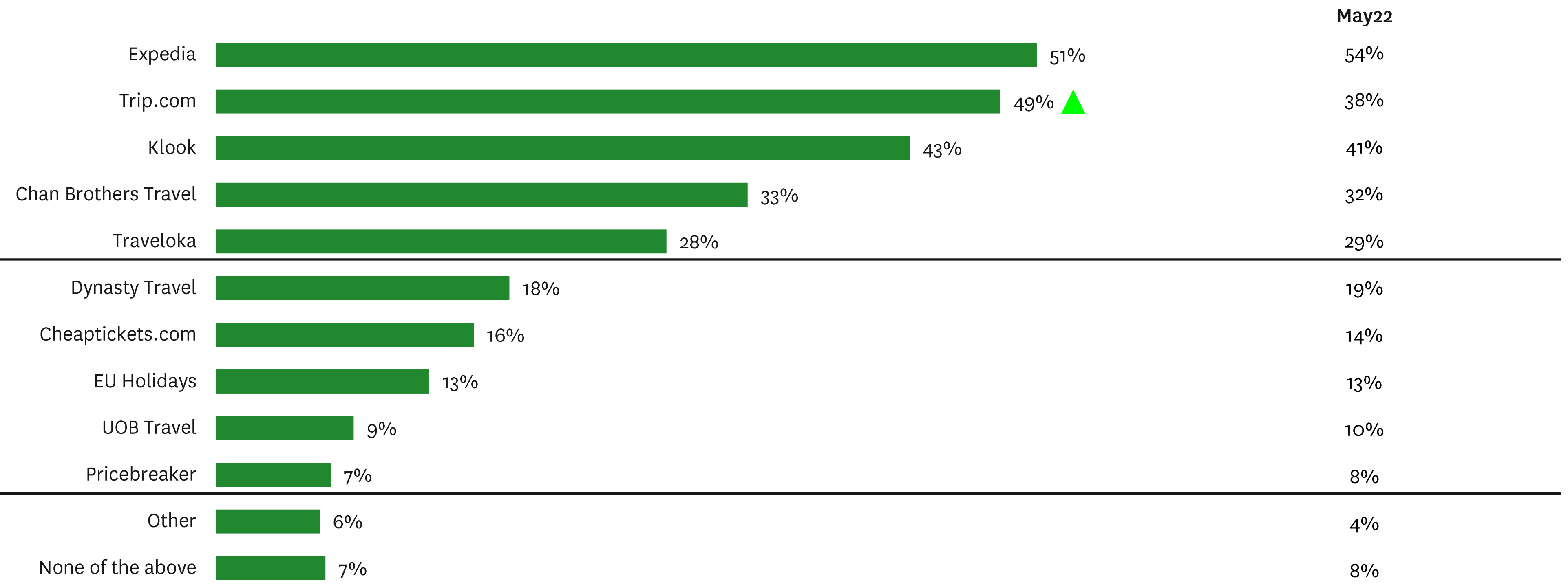
KANTAR

Sample size: May 22, Oct 22 n = 499, 300
Q "How would you prefer to book your flights to New Zealand?"
Q "How would you prefer to book your accommodation in New Zealand?"

Expedia and Trip.com could provide a strong opportunity for partnership as they are the top channels used to book international travel

Media channels for booking international travel

% Active Considerers | Oct 22



Significantly higher / lower than last wave at 95%

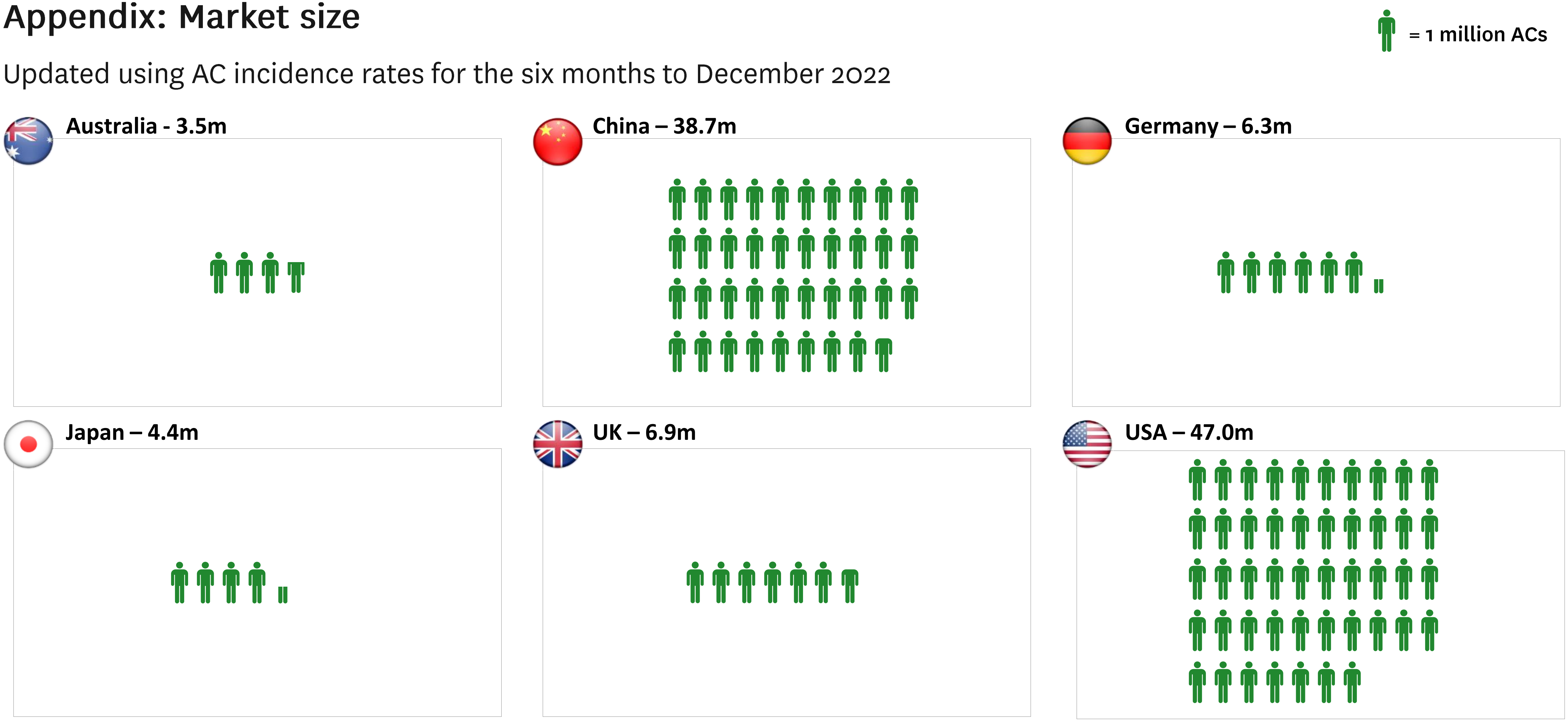
1 Appendix

KANTAR

100% PURE NEW ZEALAND
newzealand.com

Appendix: Market size

Updated using AC incidence rates for the six months to December 2022



Tier 1 & 2 total = **106.8** million

Appendix: Market size

= 1 million ACs

Updated using AC incidence rates for the latest wave in Oct-Nov 22

Canada – 5.7m

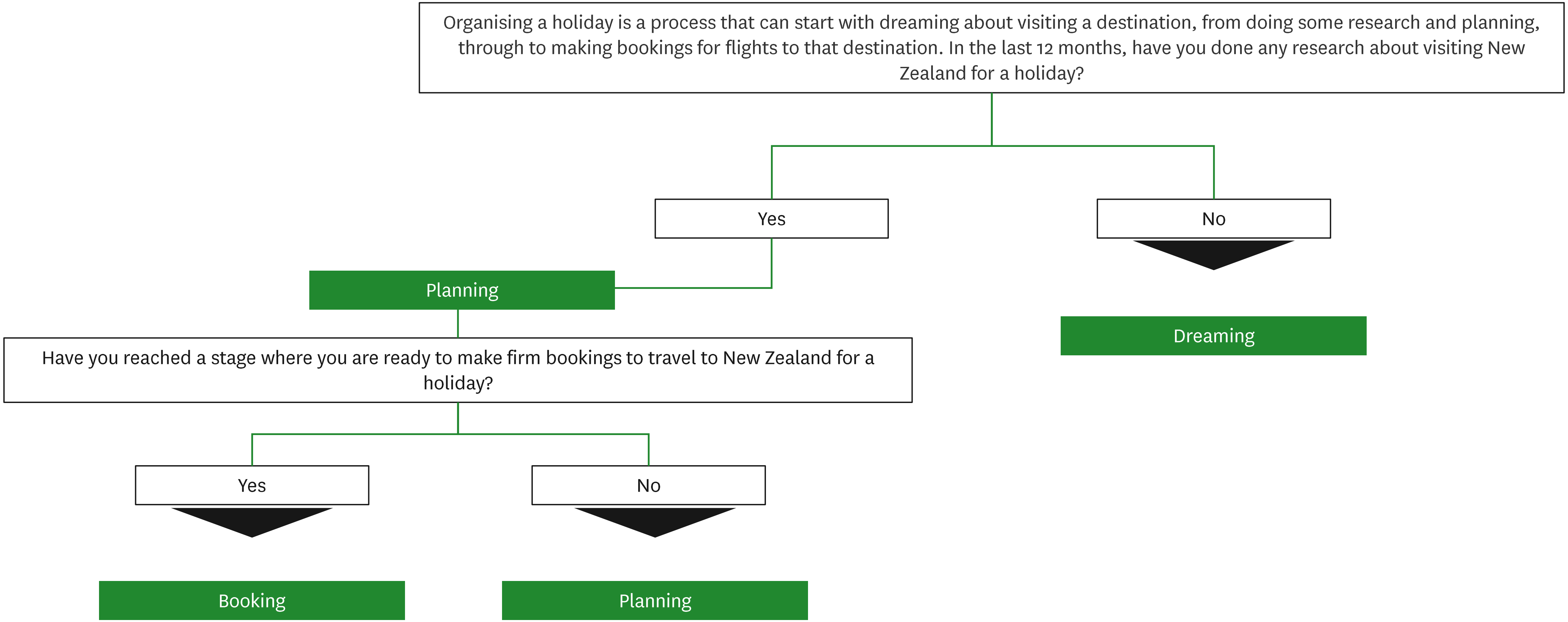
India – 10.6m

Singapore – 0.6m

South Korea – 6.9m

Appendix: Visitor consideration funnel

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



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
Amazing beaches	Has amazing beaches
Challenging	Ideal for physically and mentally challenging yourself
Clean & unpolluted	The environment there is clean and unpolluted
Comfortable	I'd feel comfortable visiting, despite any cultural differences
Easy to travel around	It's easy to travel around to see and do things
Embraces visitors	A destination that embraces visitors and wants them to enjoy their time there
Family friendly	Ideal for a family holiday
Friendly people	The locals are friendly and welcoming
Fun & enjoyment	Ideal for having fun and enjoying yourself
History & heritage	Offers opportunities to experience history and heritage
Iconic attractions	Has iconic attractions and landmarks
Wildlife	Has amazing wildlife experiences
Escape troubles	A place you can escape the troubles of the world

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
Local experiences	Offers opportunities to experience how it is to live like a local
Escape normal life	Ideal for escaping normal daily life
Quality food & wine	Offers quality local food and wine experiences
Range of adventure	Offers a wide variety of outdoor & 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
See lots without travelling far	Once there, you can see a lot without having to travel far
Unique experiences	Offers experiences that you can't get anywhere else
Unique National parks	Has remarkable and unique National parks
Indigenous culture	Has a unique indigenous culture
Covid-19 management	A destination I feel comfortable visiting due to their management of Covid-19

Appendix: Brand positioning 'how to'

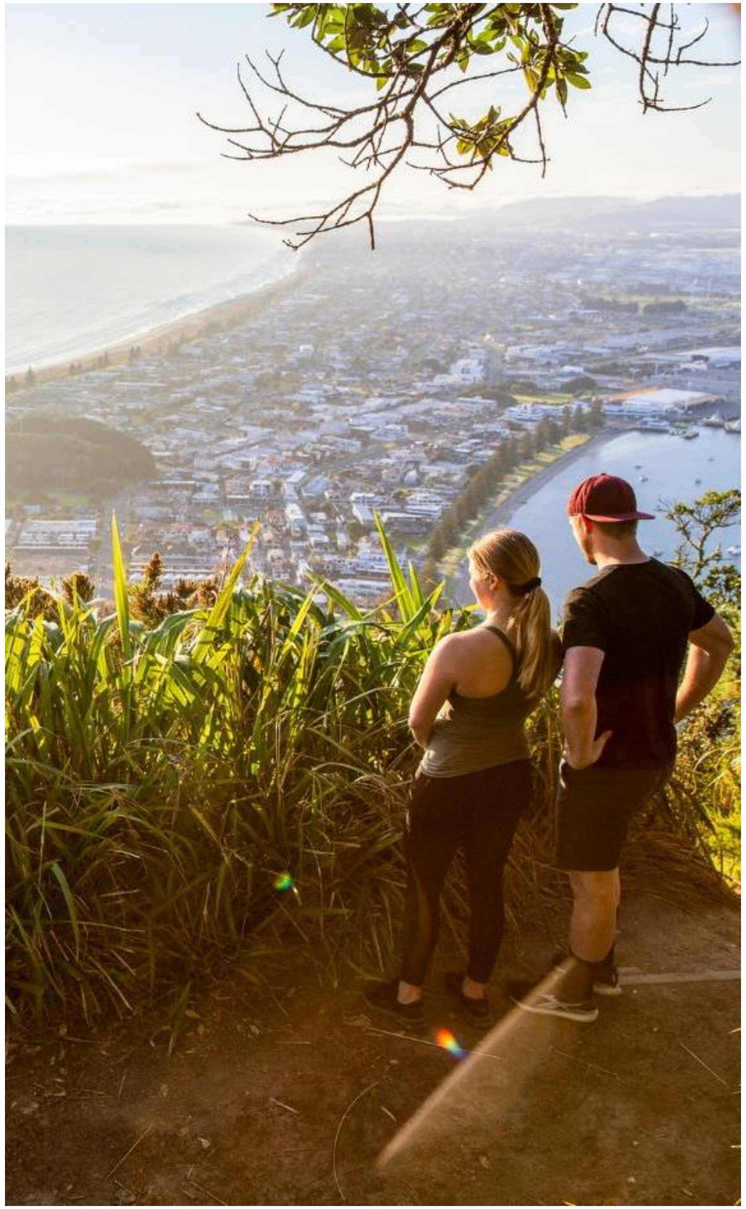
ACs are biased by their predisposition to New Zealand by design. Because we're already talking to people that really like the idea of visiting New Zealand, New Zealand tends to get rated much more favourably on the brand attributes than competitors do. To better understand relative performance, we need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

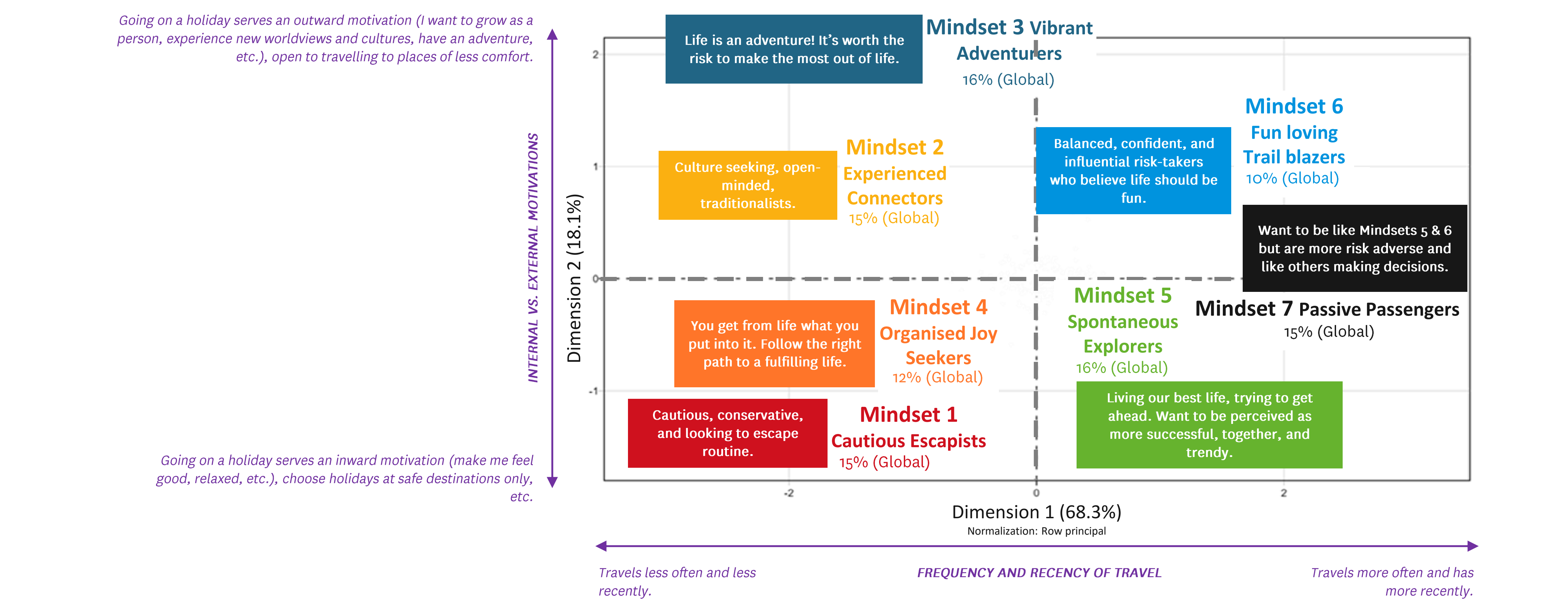
Brand associations	New Zealand	Japan	Australia	Taiwan	South Korea	Thailand
Spectacular natural landscapes and scenery						
The locals are friendly and welcoming						
Ideal to relax and refresh						
I would feel safe travelling around this destination						
Things to see and do are affordable						
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



Mindset Introduction

A Visual Representation



Mindset Introduction

Side by side

Global Priority Mindsets (Mindset 2, Mindset 3)

Mindset 1	Mindset 2	Mindset 3	Mindset 4	Mindset 5	Mindset 6	Mindset 7
Cautious Escapists	Experienced Connectors	Vibrant Adventurers	Organised Joy Seekers	Spontaneous Explorers	Fun Loving Trail Blazers	Passive Passengers
These cautious close-to-homers avoid taking unnecessary risks in life, like consistency and predictability and letting others lead. They have concerns about safety and worry about the future. They follow rules and are late adopters and value family stability and thrift. Travel is less important, but they travel to escape routine, feel pampered and connect with others and it gives them a sense of rejuvenation, appreciating and excitement.	These open-minded traditionalists like to make their own decisions, support their community and prefer to share credit. They value curiosity, authenticity learning and honesty. They travel for a different worldview, to learn new cultures and experience new things while spending time with others. They're confident travellers who like researching and value experience over money. They'll travel 10 hours plus and 2 + weeks for international holidays and feel grateful and appreciative for travel.	These adventurous risk takers like to make the most out of life. They like experimentation and prefer fun and open-minded, colourful settings and value freedom. Travel has a high importance, and they are motivated by uniqueness, adventure, and a different worldview. They like researching and will spend more to get off the beaten track. They're resilient & will sacrifice other things to travel, seeking less common destinations. Travel makes them feel bold and daring.	These self-reliant planners believe they get from life what they put into it. They avoid unnecessary risk and make their own decisions. Valuing duty, family, knowledge and wealth they like to pamper themselves when travelling and spend time with family and friends. They choose safe destinations, enjoy nature, escaping routine, cuisine and prefer to spectate. While they're less frequent travellers travel gives them joy, rejuvenation, freedom, confidence.	These striving leaders are living their best life, getting ahead and want to be perceived as successful, trendy and important. They value adventure, status, wealth, excitement & romance. They travel to reconnect with self & others, explore nature and a different worldview. They tend to be spontaneous, will do a few shorter trips, avoid sightseeing & like packages and guided tours for ease of travel. Amazement, naughty & quirky are feelings they tap into while traveling.	These balanced, confident achievers are open to risk-taking and experimentation and believe life should be fun. They tend to be influential and value wealth, status, excitement as well as tradition, social responsibility, freedom and loved ones. They travel often and to interesting places to meet people, learn cultures and reconnect with themselves and others. Travel gives them a sense of rejuvenation, joy, boldness and confidence.	These idealistic dreamers want to be like Parrots and Penguins but are more risk-adverse in life and like it when others make decisions for them While they value status and wealth, they prefer consistency. Something of a less-confident traveller, new is not that important, they like travelling locally and do little research or sightseeing. They tend to follow influencers and consult travel agents. They travel to reflect, grow and connect and feel understood.