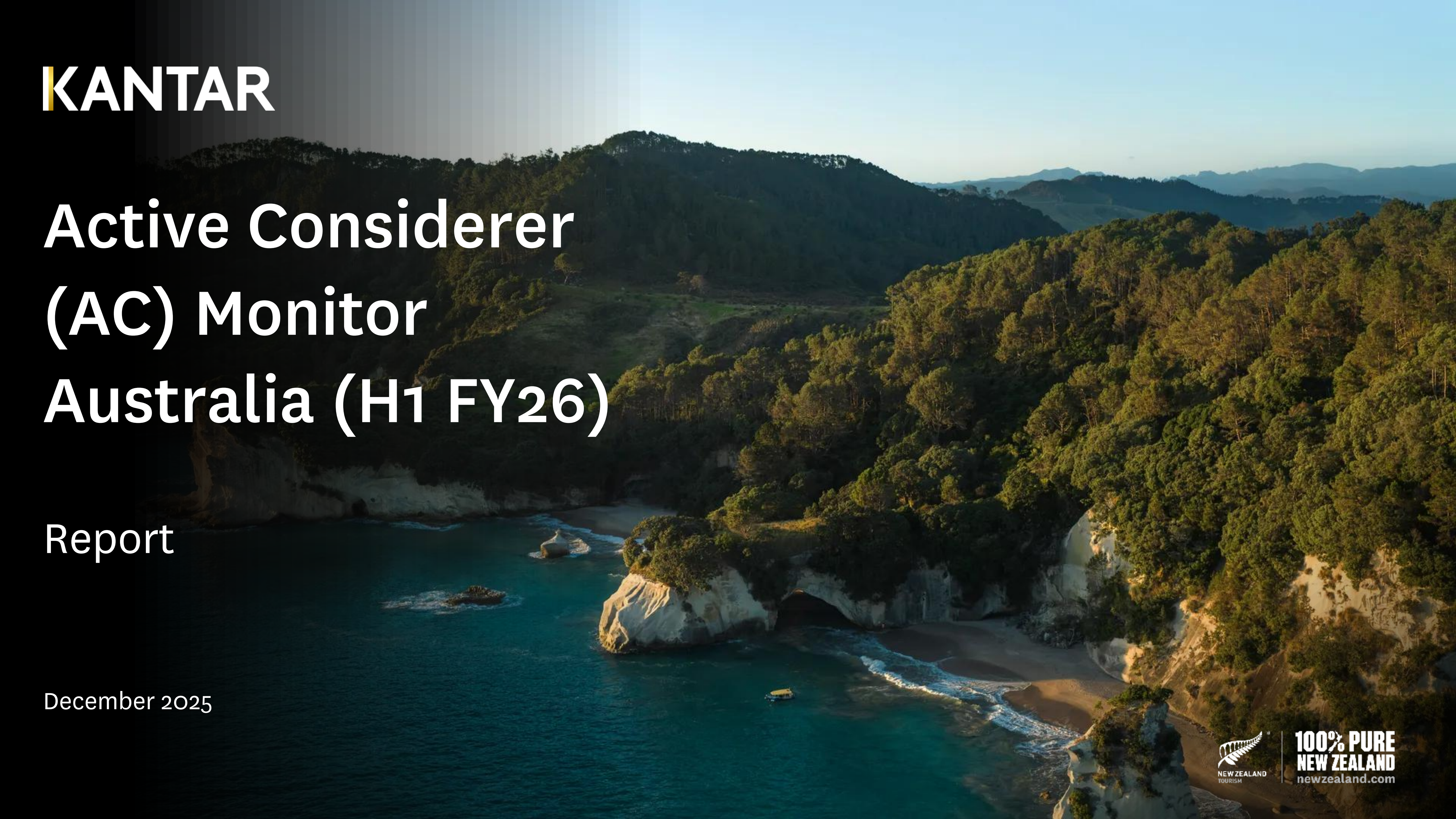
KANTAR

Active Considerer (AC) Monitor Australia (H1 FY26)

Report

December 2025



NEW ZEALAND TOURISM

100% PURE NEW ZEALAND
newzealand.com

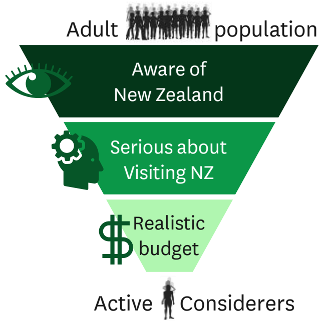
AC Monitor research specifications

Kantar conducts a **monthly online survey** in eight of Tourism New Zealand's markets:

- Australia, China (Tier 1 and 2 cities), Germany, Japan, UK and USA; as well as (from FY25) India (New Delhi, Mumbai and Bangalore) 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 FY26 where results are based on a 5-month period (Jul – Nov 25)

Kantar conducts a **bi-annual survey** for emerging markets:

- Canada and South Korea
- 300 ACs per country per wave



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

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

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

- Online population estimates come from Kantar's 2025 market sizing exercise

Australian outbound travel demand is surging beyond pre-pandemic levels supported by economic resilience, however fickle consumer confidence signals caution ahead

MARKET CONTEXT

- **Economic Stability:** Australia's economy remains resilient, underpinned by political stability and a favourable exchange rate
- **Positive 2026 Outlook:** While households are still navigating cost-of-living pressures, GDP growth is forecast at ~2.1% in 2025, supported by steady consumer spending and accommodative monetary policy
- **Consumer Sentiment:** Consumer confidence has softened towards the end of 2025, as inflation and rate concerns weigh on household budgets. Inflation however is moderating around 3.2%, and interest rates are expected to hold steady
- **Exchange Rate Advantage:** Weak NZD vs AUD (lowest in 3 years) creating meaningful value for Australian travellers

TRAVEL DEMAND

- **Outbound Travel Demand Outlook is Strong:**
  - Outbound travel has fully rebounded to 109% of pre-COVID levels, signaling strong demand
  - Australian residents took 12.26 million short-term trips overseas in the year ending June 2025, an increase of 11.6% compared to the previous year. Travel to Indonesia, New Zealand, Japan, and Vietnam recorded the strongest growth among top destinations
  - Travel intent remains strong, reflecting pent-up demand and prioritisation of leisure experiences

Performance Dashboard

	Q4 FY25	Q2 FY26
Incidence of Active Considerers(1)	27%	28%
Preference KPI(2)	63%	62%
First	40%	40%
Second	23%	23%
Funnel(2)		
Dreaming	46%	47%
Discovering	41%	43%
Planning	1.8%	0.8%
Booking	11%	9%

Brand associations(2)

Leverage strengths	Need to dial up
Indigenous culture	Iconic attractions
Relationship with the land	Quality food & wine
Clean & unpolluted	Excitement
Affordable to fly to	Safe destination

Top 5 competitors(2)

(% selected destination in their top five preferred destinations)

Japan	Italy	Tasmania	Queensland	Canada
44%	25%	22%	22%	21%

Top 5 knowledge gaps(3)

1. How easy it is to travel around
2. What / where the recommended things to see and do are
3. How long it takes to travel between the main attractions
4. What the best time of year is to do the activities I want to
5. What the weather is like

Top 5 booking barriers(4)

Low sample size (n<50). Interpret with caution

1. Waiting to accrue enough annual leave
2. Waiting for a deal on flights
3. I have more research to do about New Zealand as a holiday destination
4. Waiting for the right life circumstances to travel
5. Waiting for a good package deal on flights and accommodation

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1. Sample size: Online population Q4 FY25 (6M) n = 3533 | Q2 FY26 (5M) n = 2945
2. Sample size: ACs Q4 FY25 (6M) n = 674 | Q2 FY26 (5M) n = 524
3. Sample size: ACs Q2 FY26 (5M) n = 450
4. Sample size: ACs Q2 FY26 (5M) n = 22

Significantly higher / lower than previous period

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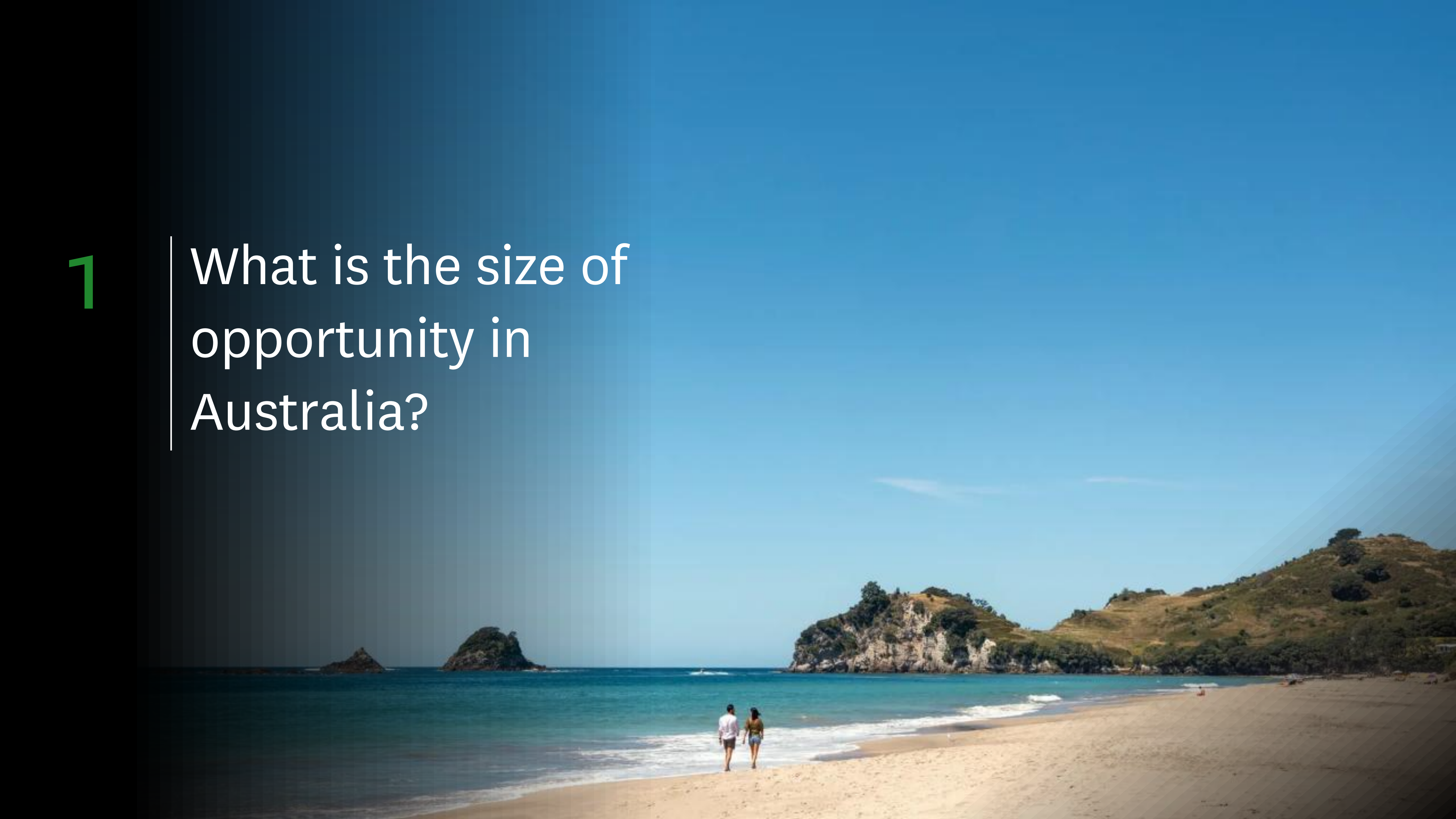
Key insights

- The AC incidence in Australian has remained steady at 28% for this current period, equating to an estimated 5.0 million ACs
- With the vast majority of ACs remaining in the Dreaming and Discovery stages, TNZ could benefit from even further increased efforts to accelerate conversion through the funnel by motivating planning (0.8%) and booking (9%)
- Japan remains the top competitor destination, followed - at some distance - by Italy, Tasmania, and Queensland.
- To stand out from competitors, strategic brand messages should emphasise New Zealand's strengths in its indigenous culture, relationship with the land, its clean image and affordability of flights. Additionally, there is room to strengthen perceptions of New Zealand as a safe destination that offers excitement and has iconic attractions, as well as offering quality food & wine.
- There is an opportunity to reduce conversion frictions by helping ACs decide on the optimal time of year to enjoy their desired activities and addressing weather concerns as these are key knowledge gaps. Tactical marketing messages should also look to address key logistical concerns, such as the ease of travel within the country and between the main attractions, while offering deals on flights will help facilitate conversion of ACs.
- The majority of ACs are looking to spend between 5-14 days in New Zealand. While travel aggregators are the most popular channel to book accommodation and activities, airlines provide a valuable opportunity for TNZ to influence ACs' booking decisions related to flights. Additionally, local transport providers play a key role in shaping decisions related to transport

1

What is the size of opportunity in Australia?



Active Considerer Funnel – Australia

Active Considerers definition

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

Online population, 18-74 years of age[(1)] — **18.0m**

62%

Find New Zealand **highly appealing** as a holiday destination, and... — **11.2m**

67%

Would **seriously consider** visiting in the next three years, and... — **7.5m**

86%

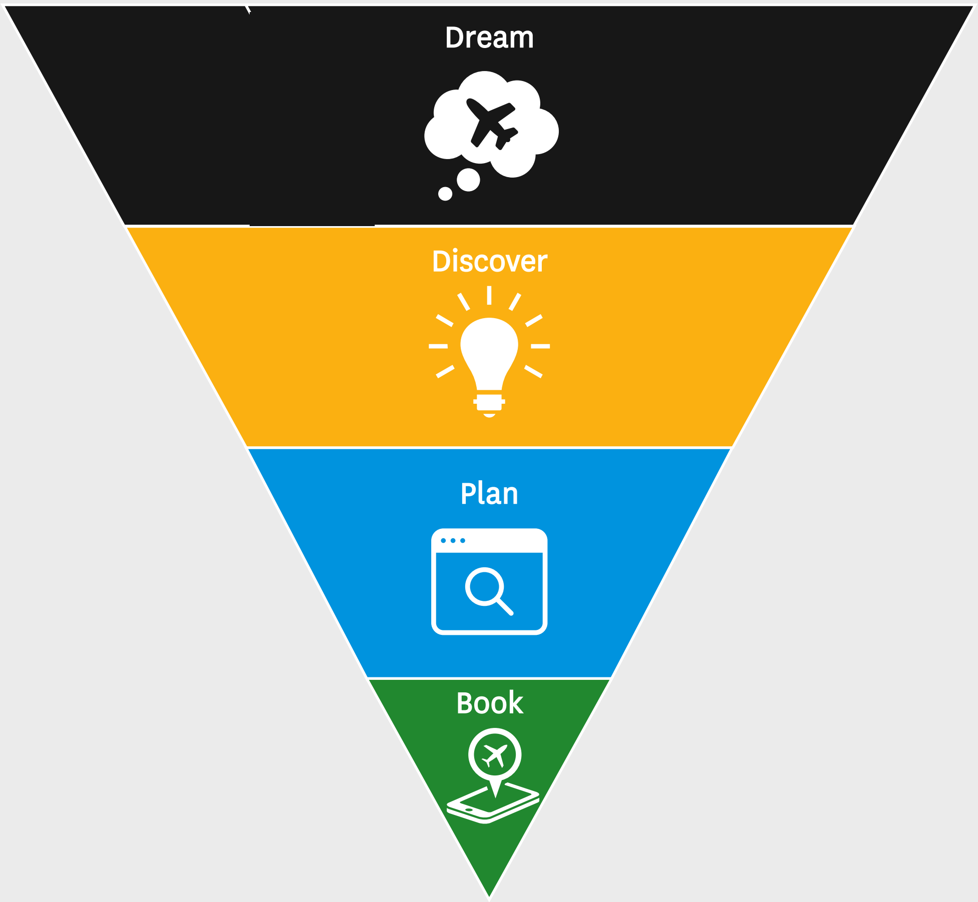
New Zealand is a preferred (top 5) destination for their next holiday, and... — **6.5m**

78%

Willing to spend at least $1,500 AUD per person on a holiday to New Zealand[(2)] — **5.0m**

1. The approx. AC pool size is based on the online population estimates as of November 2025 and the AC incidence rate for the current five months
2. Including accommodation and daily expenses. Based off actual market data spend

Journey funnel to New Zealand – Australia



Book to come to NZ
Moment of Truth

	Active Considerers (5m)	Size (%) Q2 FY26	Size (%) Q4 FY25
Dream	2.3m	47%	*46%*
Discover	2.2m	43%	*41%*
Plan	0.0m	1%	*2%*
Book	0.5m	9%	*11%*

1.48m Total Arrivals (1)
(of which 634k are Holiday Arrivals)

Given New Zealand's proximity, the time that ACs spend in the funnel is likely to be shorter and less planning is required. ACs are likely to jump from Dreaming into arrivals faster than other markets. They may not spend much time in the booking mindset reflecting higher arrivals than the booking mindset pool.

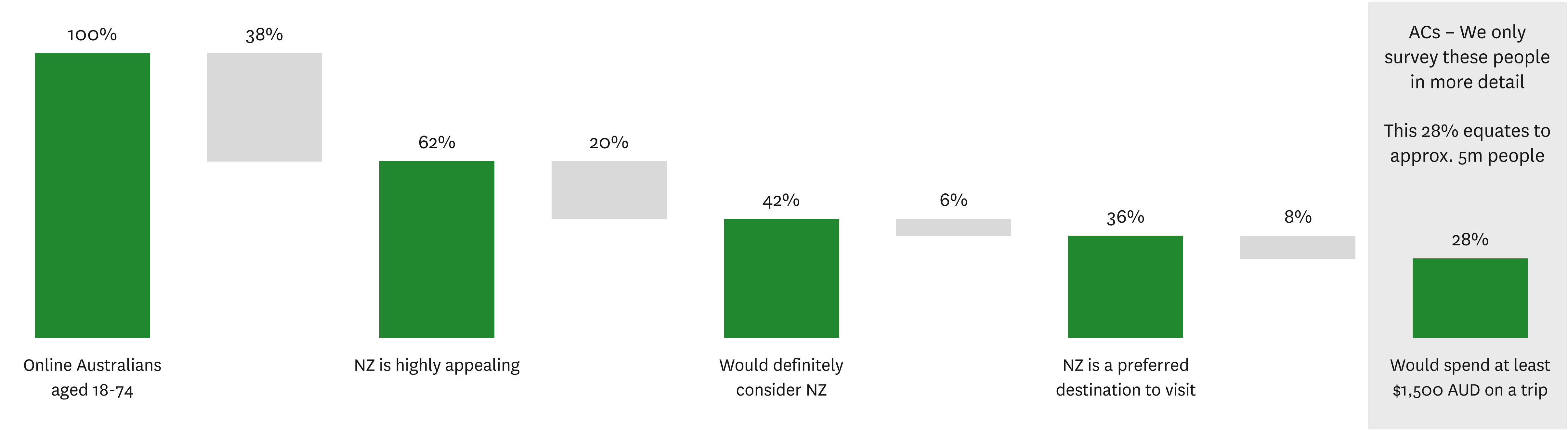
Significantly higher / lower than previous period

1. Annual arrivals (Oct 24 - Sep 25) as supplied by TNZ, rounded to nearest 10k people

The AC incidence in Australia has remained stable at 28%, equating to approximately 5 million people

Qualifying criteria for defining ACs

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



Previous 6M	100%	39%	61%	18%	43%	6%	37%	9%	27%

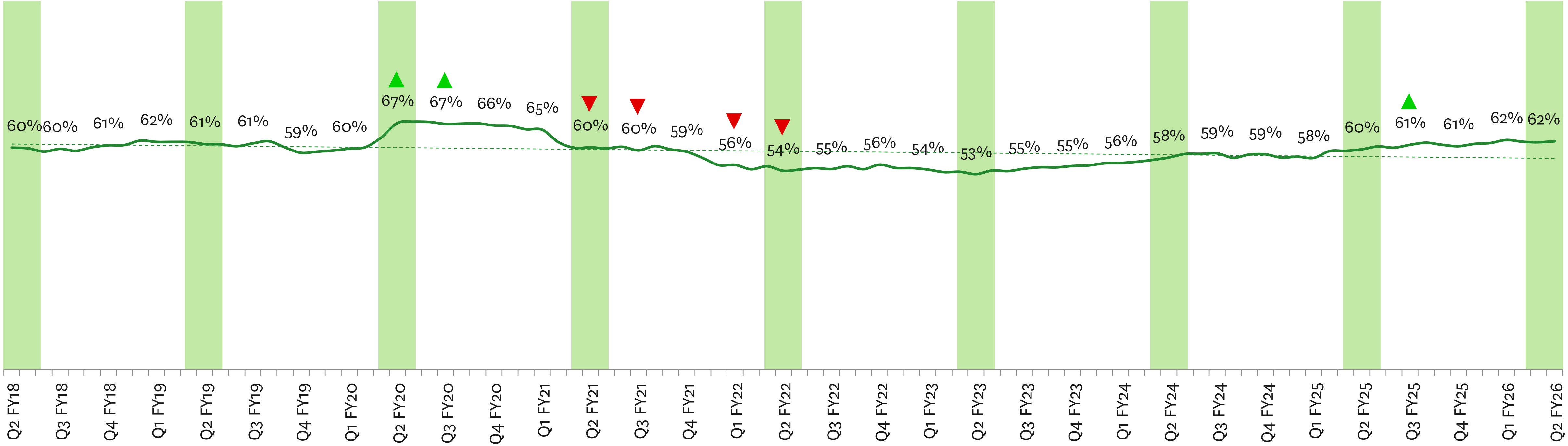
Significantly higher / lower than six month prior at 99%

Appeal has remained consistent during the past year, however there is a steady upward trend since Q2 FY23

Appeal

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

- Appeal is measured among the total online population aged 18 to 74 years old, and is the 'above the funnel' measure
- **Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals**
- Appeal is likely to be impacted by macro situation, scalable events (i.e., Rugby World Cup, NZ handling of Covid pandemic), and high impact earned mass-reach media TNZ efforts



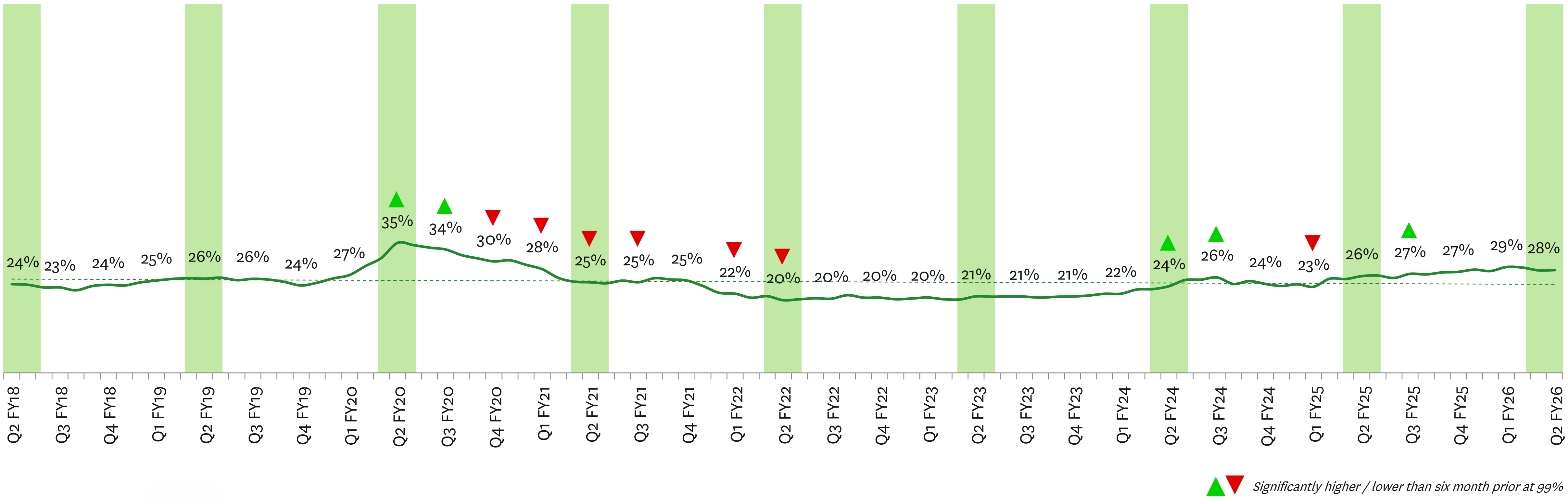
Significantly higher / lower than six month prior at 99%

Sample size: Q2 FY18 – Q2 FY26 (6MRA) minimum n = 2713 | maximum n = 5376
Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"

The AC incidence in Australia has also remained stable this past year

Incidence of ACs

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

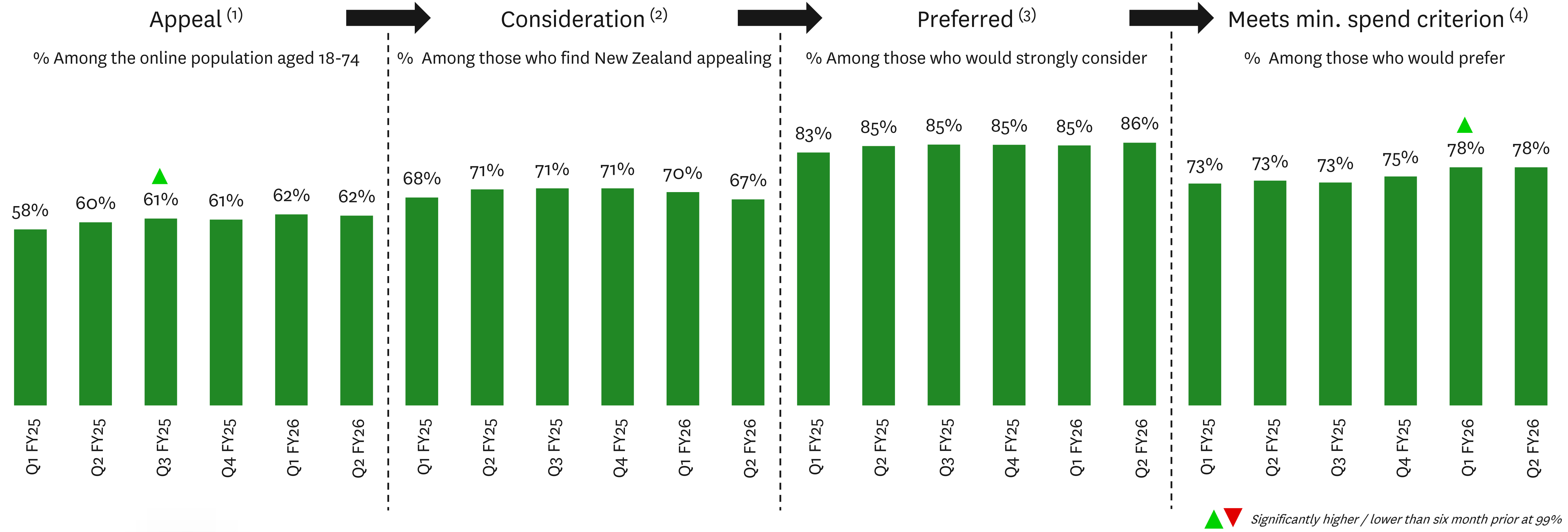


Sample size: Q2 FY18 – Q2 FY26 (6MRA) minimum n = 2713 | maximum n = 5376
% of population who find New Zealand as a holiday destination as highly appealing (%8-10), has strong consideration to holiday in New Zealand (%8-10), strongly prefers to holiday in New Zealand (%4-5), and would spend at least $1,500 AUD while holidaying in New Zealand

Conversion through the consideration funnel is stable

Conversion of ACs through the Consideration Funnel

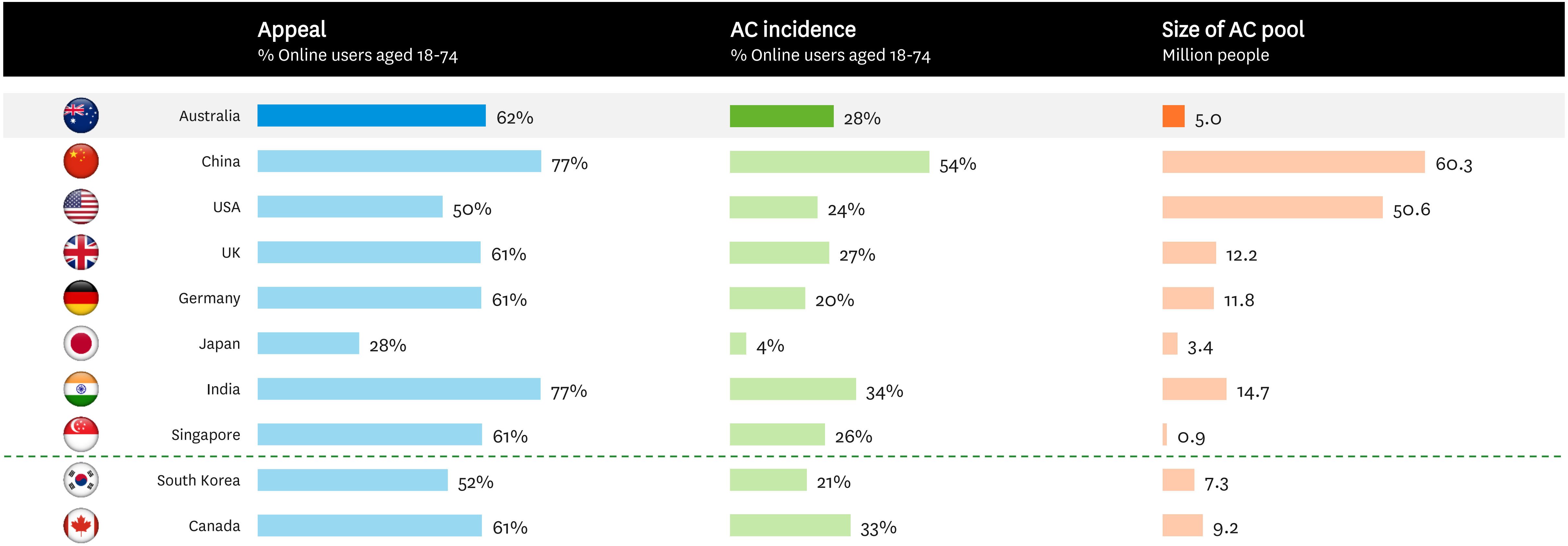
AC Monitor | 6MRA | Target online population aged 18-74



Sample size: Q1 FY25 – Q2 FY26 (6MRA): Appeal minimum n = 2945, maximum n = 4512 | Consider minimum n = 1791, maximum n = 2582 | Prefer minimum n = 1173, maximum n = 1632 | Spend minmum n = 992, maximum n = 1299

1. Question "Putting aside any thoughts about time and cost, how appealing do you find New Zealand as a holiday destination?"
2. Question "Would you consider visiting New Zealand for a holiday within the next three years?"
3. Question "To what extent do you agree or disagree that New Zealand is a preferred destination for your next holiday?"
4. Question "On a per person basis, how much would you be willing to spend on a holiday to New Zealand?"

With approximately 5 million ACs, Australia offers a solid opportunity for TNZ to drive arrivals



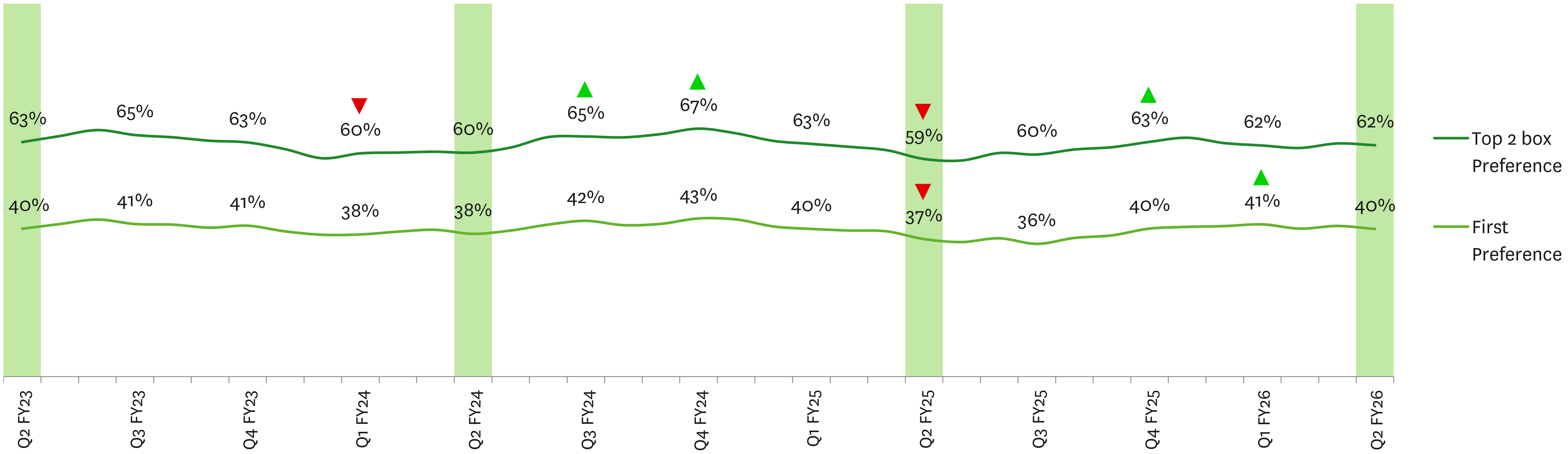
Source for top 8 markets: AC Monitor | Online population aged 18-74 | Current 5M
Australia n = 2945 | China n = 1475 | USA n = 3881 | UK n = 3889 | Germany n = 4546 | Japan n = 24642 | India n = 2473 | Singapore n = 3152 | South Korea n = 2174 | Canada n = 1327

Preference for New Zealand remains stable – declines previously witnessed in the first half of the previous 2 years have not appeared in the first half of FY26

New Zealand Preference KPI

AC Monitor | 6MRA | Total Active Considerers

Over the past 2 years, preference appears to decline in the first half of the year (Q1 / Q2) and increase in the second half (Q3 / Q4)



Significantly higher / lower than six month prior at 95%

Sample size: Q2 FY23 – Q2 FY26 (6MRA) n = 900, 900, 900, 900, 900, 900, 900, 901, 901, 900, 900, 900, 750

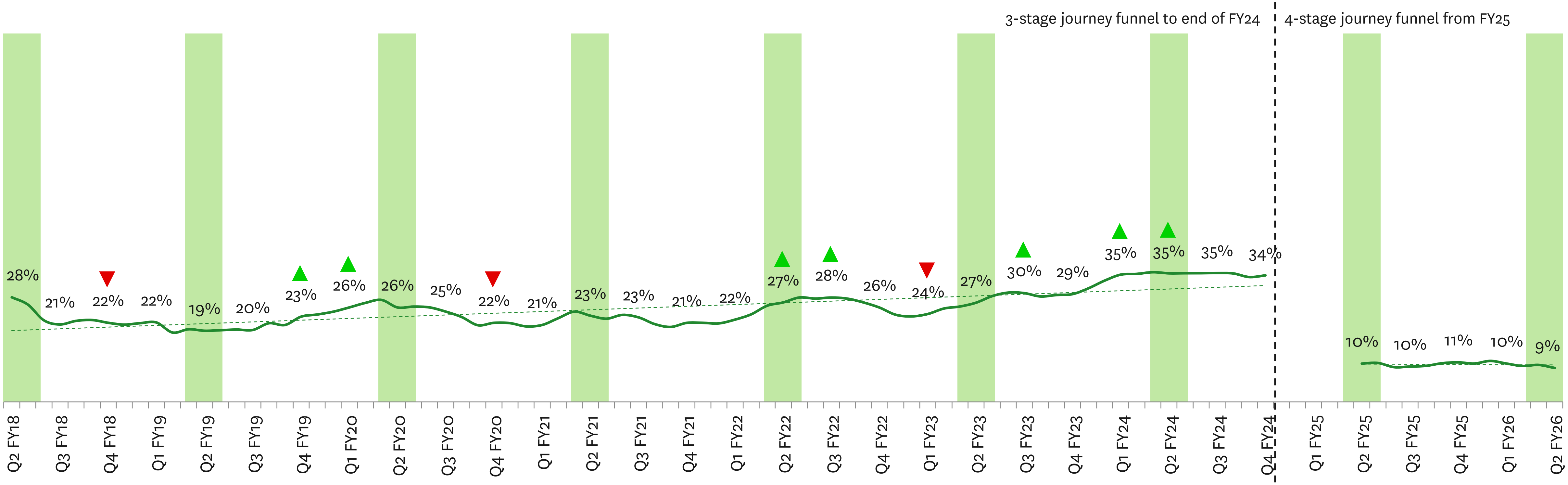
Question "Can you please rank those destinations in order of preference where 1 is your most preferred destination?"

Proportion of ACs in the booking mindset has remained stable over the year

ACs in the Booking Mindset

AC Monitor | 6MRA | Active Considerers

First 5 months of FY25 not shown as the 6MRA for these months include data from both the 3-stage and 4-stage journey funnels. Q2 FY25 onwards includes 6MRA data from the current 4-stage journey funnel only.



Significantly higher / lower than six month prior at 95%

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Sample size: Q2 FY18 – Q2 FY26 (6MRA) minimum n = 523 | maximum n = 1072
% of ACs who are in the Booking Mindset

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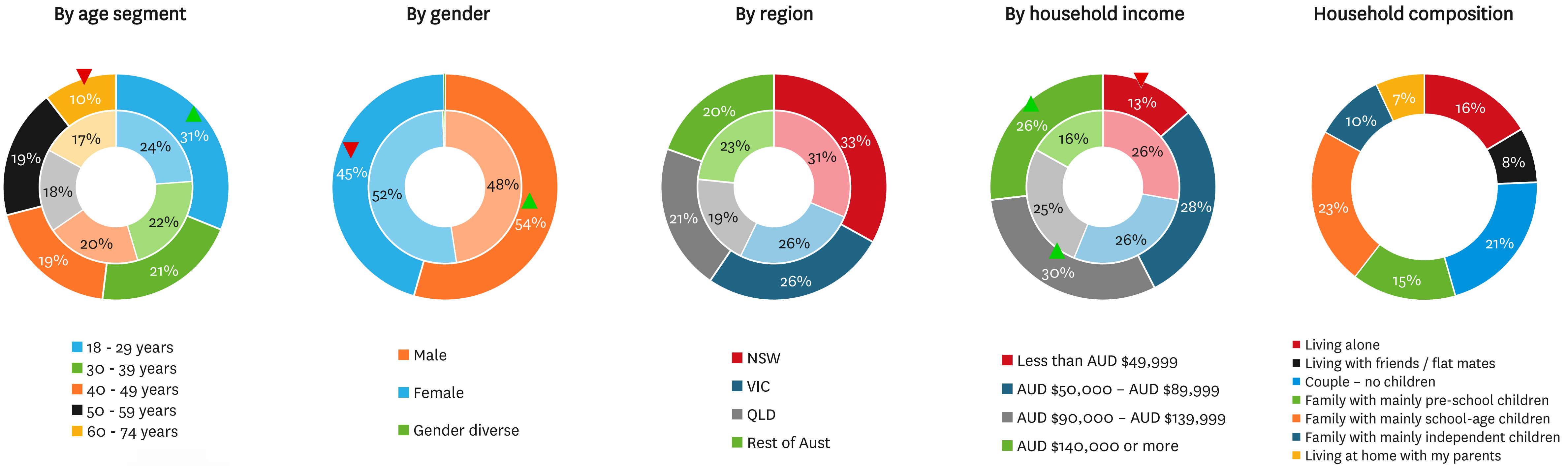
The Australian AC pool skews towards males, 18-29 year olds, and those in higher household income brackets; 38% of ACs have pre-school or school-aged children

Profile of Active Considerers

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

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

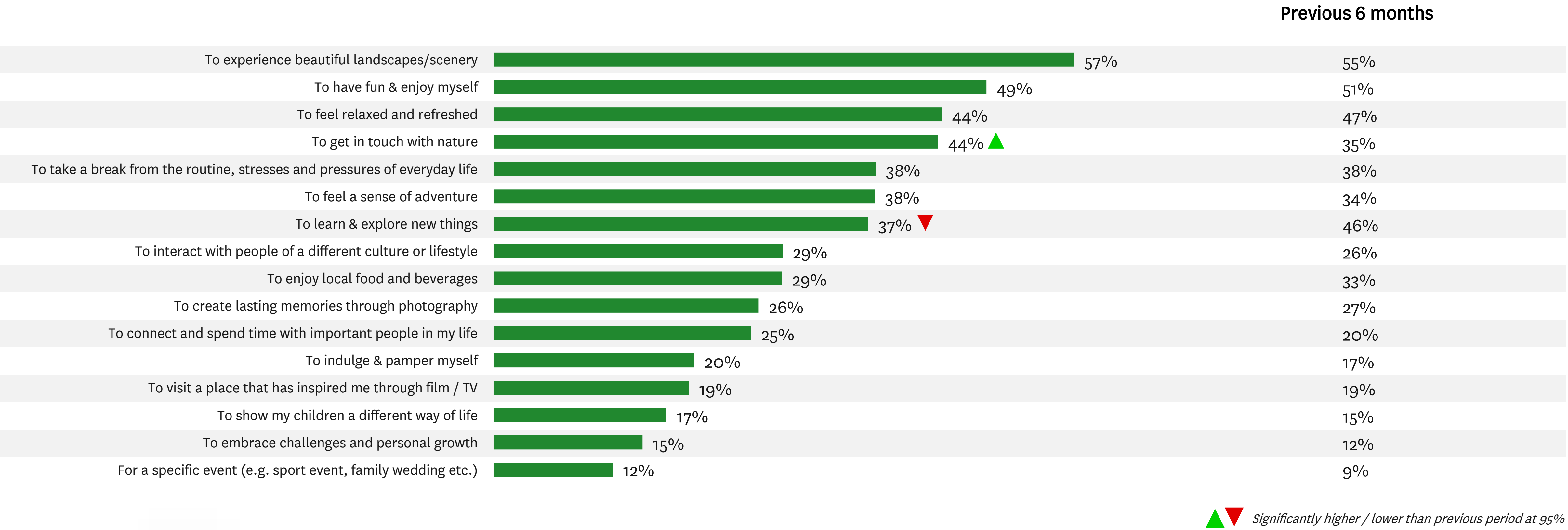


2 How can TNZ drive desirability of New Zealand as a holiday destination?

Landscapes, fun and relaxation remain core drivers, with a rising desire to connect with nature

Reasons to visit New Zealand for a holiday

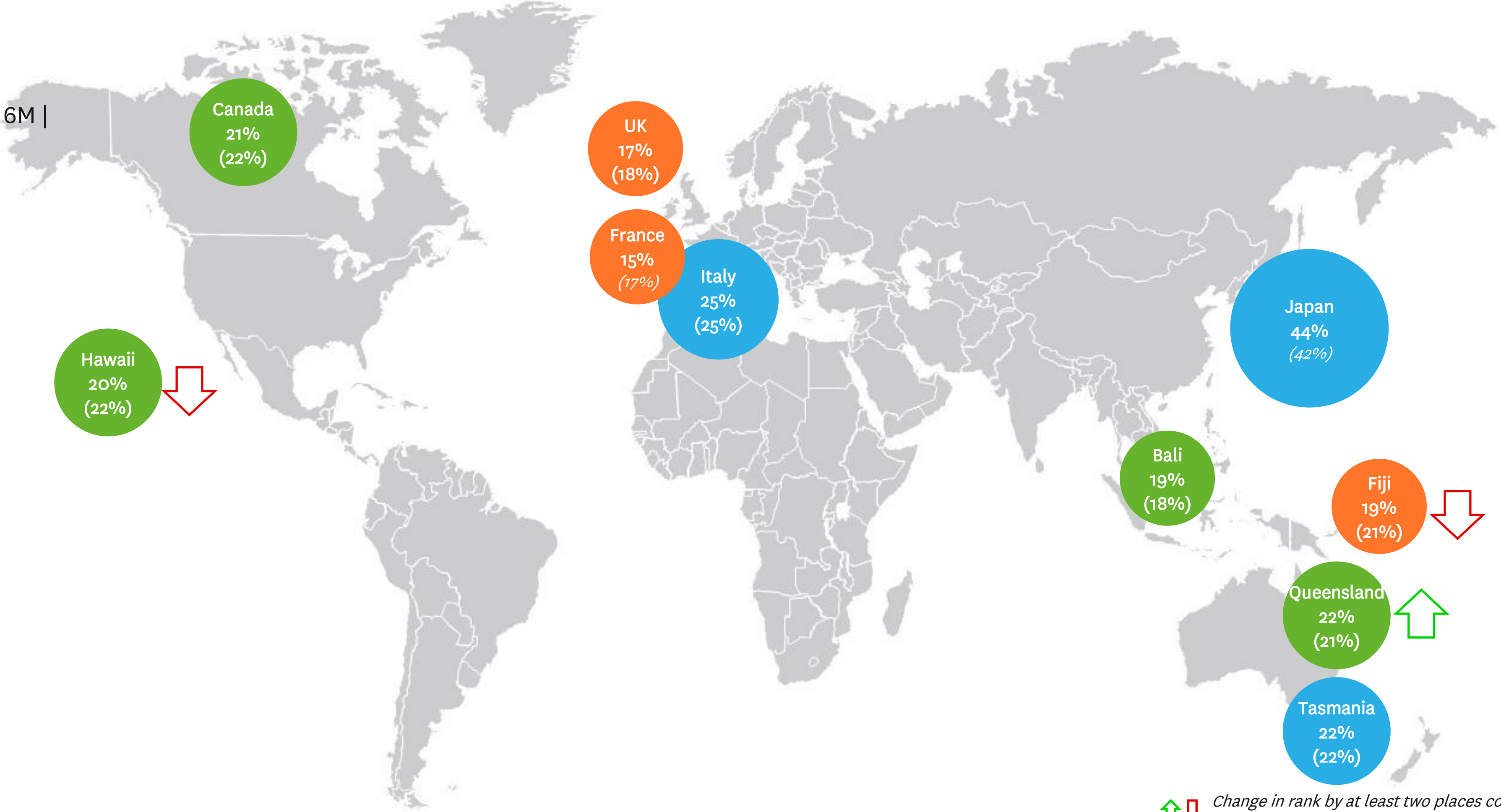
AC Monitor | Current 5M | Total Active Considerers



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

Japan, Italy, Tasmania and Queensland remain New Zealand's top competitors in terms of preference

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



There have been no changes to the top 10 this year

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?"

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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

Categorising brand associations to the framework...

Strategic Brand Drivers

- Relax & refresh
- All year-round
- Landscapes & scenery
- Relationship with the land
- Unique experiences
- Iconic attractions
- Friendly & welcoming
- 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

Context to preference driver analysis

Using Jaccard's analysis, we estimate which brand attributes and destination attributes drive preference for New Zealand and how New Zealand performs relative to its key competitors in order to identify priorities for each market

We typically do brand preference driver analysis once a year on key markets

The brand driver analysis included in this report is based on the most recent results available: Data from Jul-25 to Nov-25

Brand messaging should focus on key drivers of preference - excitement, range of experiences, clean image, welcoming environment, as well as the indigenous culture; messaging around our food & wine, beaches, wildlife and offering a place to escape could be strengthened

Drivers of preference for NZ

AC Monitor | Rank | 2025 (Jul-Nov 25) | Total Active Considerers

Latest results	2025 rank	2024 rank	2023 rank
Excitement	1	1	1
Range of experiences	2 ⇧	7	11
Clean & unpolluted	3	4 ⇧	13
Friendly & welcoming	4	5	9
Indigenous culture	5 ⇧	15	19
Landscapes & scenery	6	2	2
Range of adventure	7	3	4
Safe destination	8	6	7
Family friendly	9	9 ⇧	18
Iconic attractions	10	8 ⇧	17
Relationship with the land	11 ⇧	18 ⇩	10
Fun & enjoyment	12	12 ⇩	3
Local culture	13	16 ⇧	22
Relax & refresh	14 ⇧	21 ⇩	8
Affordable to fly to	15	13	15

Latest results	2025 rank	2024 rank	2023 rank
Quality food & wine	16	19	16
Easy to travel around	17 ⇩	11 ⇧	20
Place to escape	18	17 ⇩	12
Amazing beaches	19	20 ⇧	26
Wildlife experience	20	23	24
Interesting cities	21	22	23
Affordable activities	22	24	25
All year-round	23 ⇩	10 ⇧	21
Unique experiences	24 ⇩	14 ⇩	6

Strategic Brand Drivers | Key Category Differentiators

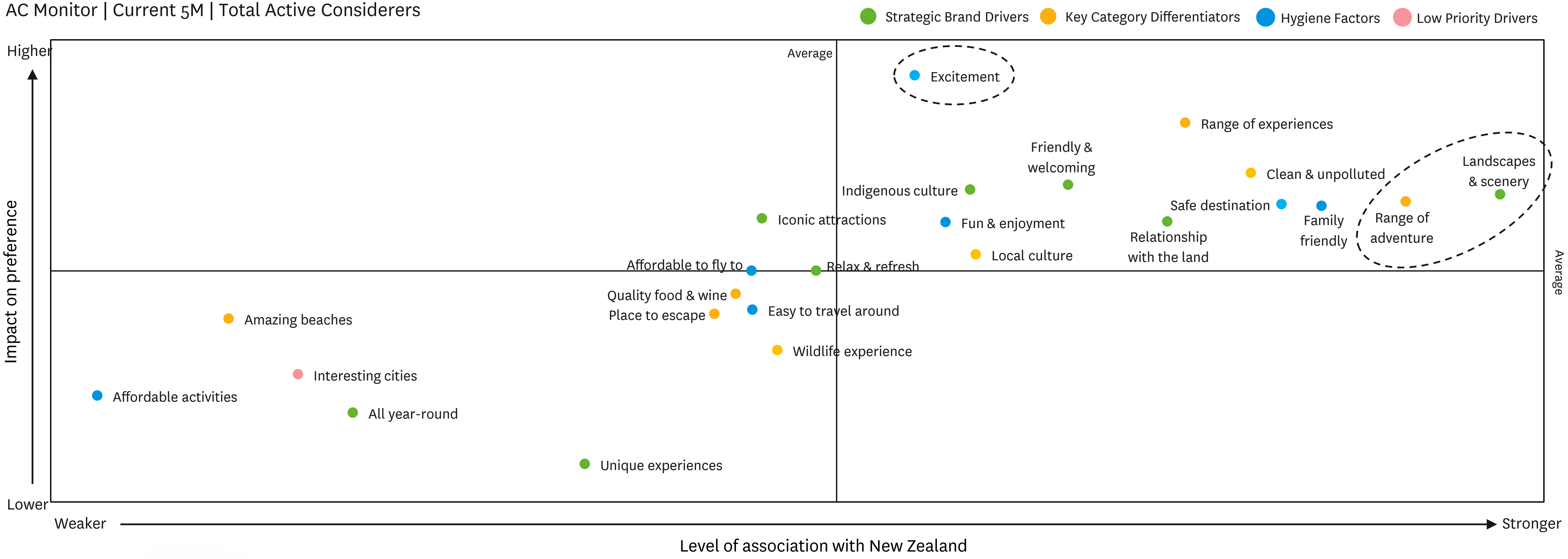
Low Priority Drivers | Hygiene Factors

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

New Zealand as a destination demonstrates stronger associations with higher impact drivers such as its landscapes & scenery and range of adventure; however there remains potential to strengthen perceptions of New Zealand as an exciting destination

Brand Associations of New Zealand x Impact on preference

AC Monitor | Current 5M | Total Active Considerers



Sample size: n = 750

Question: "Which destinations, if any, do you associate with this statement?"

Relative to competitors, New Zealand's indigenous culture and relationship with the land offer key strengths, but there is room to boost perceptions of iconic attractions, range of unique experiences, quality food and wine, and offering an escape

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	Japan	Italy	Tasmania	Queensland	Canada
Strategic Brand Drivers	Friendly & welcoming	107	102	87	102	89	109
	Indigenous culture	136	116	69	65	86	109
	Landscapes & scenery	96	92	98	108	85	126
	Iconic attractions	86	116	131	77	85	115
	Relationship with the land	126	107	88	91	85	88
	Relax & refresh	105	74	103	113	121	81
	All year-round	95	101	103	88	132	81
	Unique experiences	92	123	134	81	71	107
Key Category Differentiators	Range of experiences	88	110	114	90	90	116
	Clean & unpolluted	111	97	67	116	89	113
	Range of adventure	101	89	81	102	108	119
	Local culture	99	126	124	83	69	101
	Quality food & wine	90	86	148	109	94	79
	Place to escape	94	114	113	93	84	106
	Amazing beaches	102	52	114	113	163	54
	Wildlife experience	109	72	47	124	117	126

Actions for TNZ:

Strengths:

- Indigenous culture
- Relationship with the land
- Clean & unpolluted
- Wildlife experience
- Friendly & welcoming

Drivers to dial up:

- Range of experiences
- Iconic attractions
- Quality food & wine
- Unique experiences
- Place to escape

Sample size: n = 750
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 perceived as a more family-friendly destination and more affordable to fly to compared with key international competitors, with an opportunity to strengthen perceptions around fun and excitement, safety, and the appeal of its cities

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	Japan	Italy	Tasmania	Queensland	Canada
Hygiene Factors	Excitement	92	111	124	88	83	109
	Safe destination	94	108	89	109	101	101
	Family friendly	106	83	72	108	125	102
	Fun & enjoyment	92	99	99	97	107	111
	Affordable to fly to	127	82	49	148	132	39
	Easy to travel around	96	93	96	112	117	86
	Affordable activities	104	97	77	133	115	66
Low Priority	Interesting cities	82	130	130	69	79	120

Actions for TNZ:

Strengths:

- Affordable to fly to
- Family friendly

Drivers to dial up:

- Interesting cities
- Excitement
- Fun & enjoyment
- Safe destination

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Sample size: n = 750
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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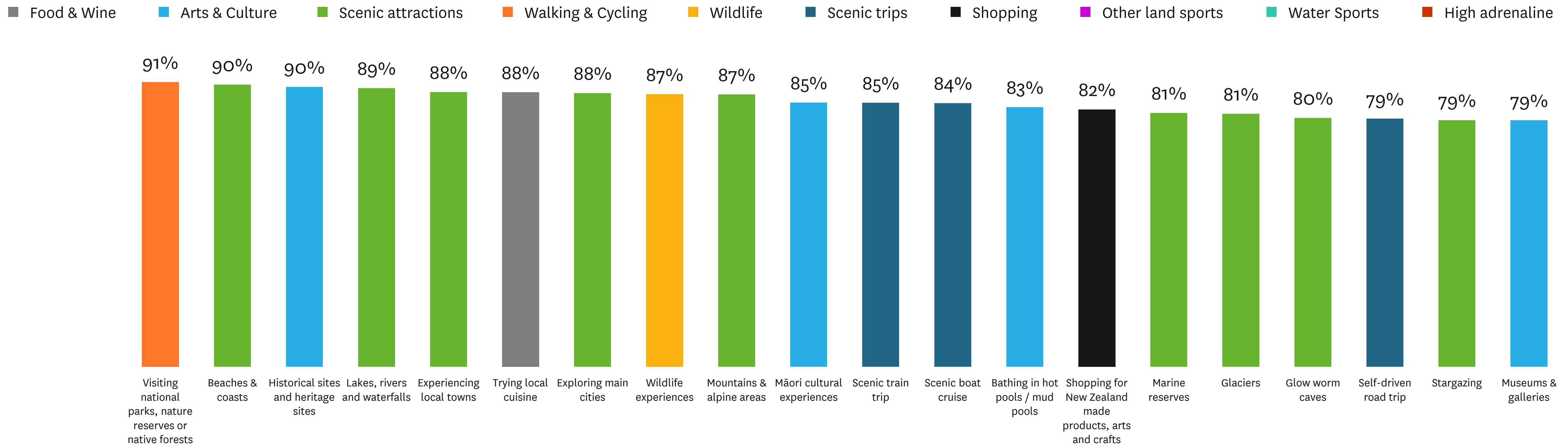
The most common activities of interest include visiting our national parks, beaches & coasts and historical sites; promoting these activities and other scenic attractions can help strengthen less competitive brand perceptions such as iconic attractions and a place to escape

Activities interested in doing in New Zealand (Top 20)

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



	Visiting national parks, nature reserves or native forests	Beaches & coasts	Historical sites and heritage sites	Lakes, rivers and waterfalls	Experiencing local towns	Trying local cuisine	Exploring main cities	Wildlife experiences	Mountains & alpine areas	Māori cultural experiences	Scenic train trip	Scenic boat cruise	Bathing in hot pools / mud pools	Shopping for New Zealand made products, arts and crafts	Marine reserves	Glaciers	Glow worm caves	Self-driven road trip	Stargazing	Museums & galleries
Previous 6 months	89%	90%	90%	92%	92%	91%	89%	87%	86%	86%	89%	83%	81%	79%	81%	81%	83%	85%	77%	80%

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Sample size: Total ACs n = 300 | Previous 6M n = 450
Question "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"

Significantly higher / lower than previous period at 95%

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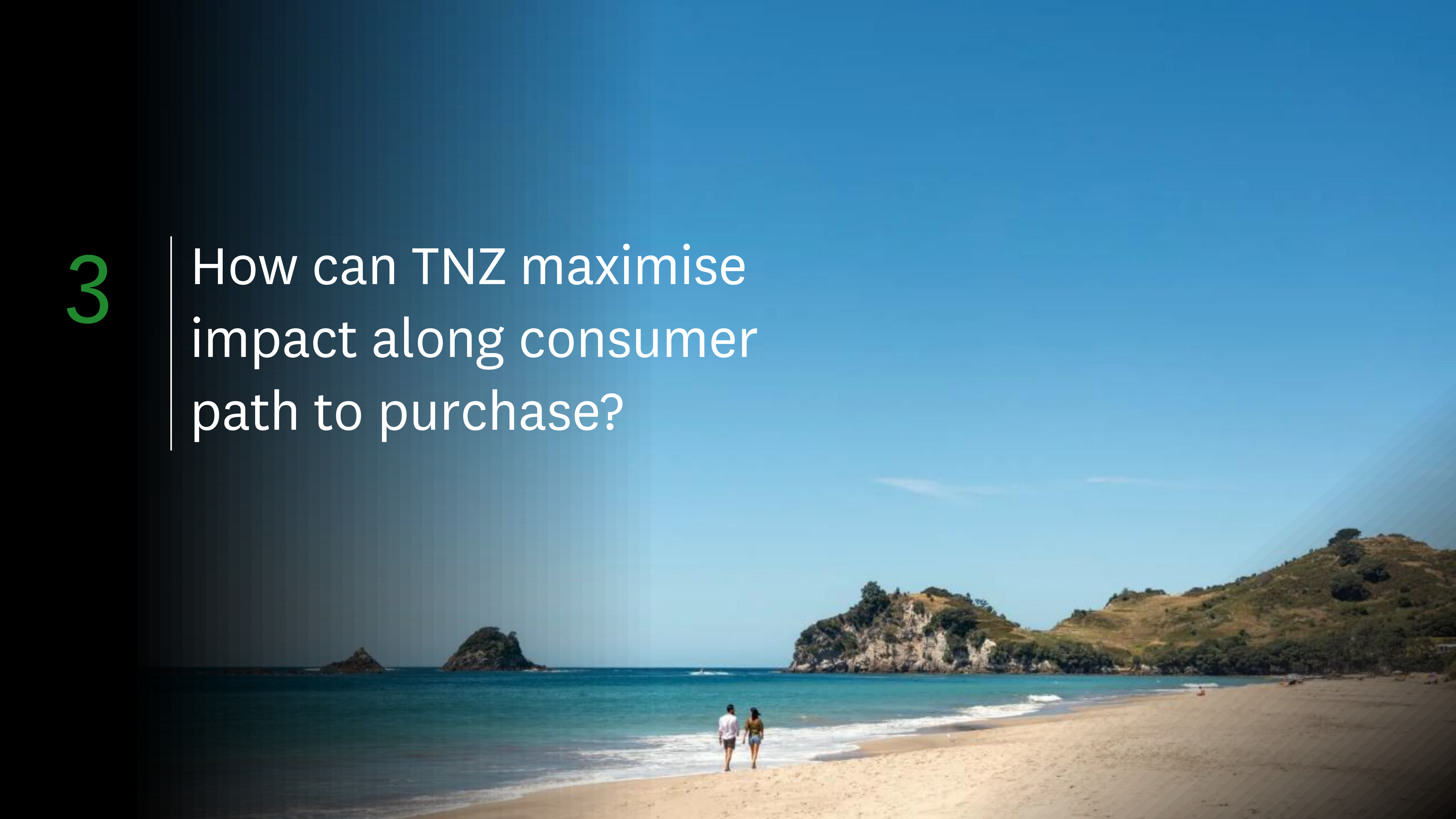
100% PURE NEW ZEALAND

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



The ease of travel around New Zealand, including time it takes to travel between main attractions, are key concerns for potential travellers; specific messaging should also focus on what and where the recommended things to see and do are

Top ten knowledge gaps

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

	What do ACs want to know more about before choosing New Zealand?	Now	Previous 6 months
1	How easy it is to travel around	38%	42%
2	What / where the recommended things to see and do are	31%	29%
3	How long it takes to travel between the main attractions	31%	29%
4	What the best time of year is to do the activities I want to	30%	35%
5	What the weather is like	30%	35%
6	How welcoming the locals are	27%	26%
7	How safe it is from crime	26%	29%
8	The length of time required to fly to New Zealand	24%	19%
9	The length of time needed to experience New Zealand properly	23%	28%
10	The quality and variety of food and beverage options	22%	23%

Ranks higher now than six months ago

Significantly higher / lower than previous period at 95%

Sample size: Current 5M n = 450 | Previous 6M n = 450

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

Similar tactical communications would resonate with Dreamers, Discoverers and those in the Booking phase, although Discoverers would benefit from more information regarding the best time of year to travel and Bookers want to know more about food & beverage options

Low sample size (n<100). Interpret with caution

Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5M | Total Active Considerers

	What do ACs want to know more about before choosing New Zealand?	Dreaming	Discovering	Planning	Booking
1	How easy it is to travel around	43%	36%	Low sample size (n<50)	27%
2	What / where the recommended things to see and do are	32%	27%		34%
3	How long it takes to travel between the main attractions	31%	30%		31%
4	What the best time of year is to do the activities I want to	26%	36% ▲		26%
5	What the weather is like	34%	28%		25%
6	How welcoming the locals are	30%	24%		26%
7	How safe it is from crime	22%	30%		23%
8	The length of time required to fly to New Zealand	20%	26%		32%
9	The length of time needed to experience New Zealand properly	25%	25%		13%
10	The quality and variety of food and beverage options	22%	19%		32% ▲

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

Sample size: Dreaming n = 189 | Discovering n = 191 | Planning n = 12 | Booking n = 58
Question "Putting thoughts aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

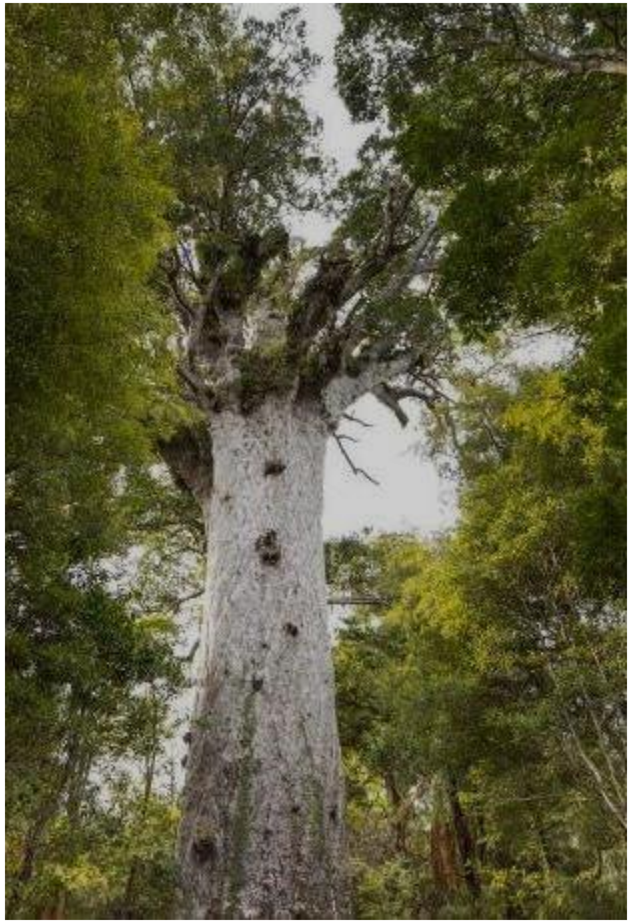
Working with trade partners to offer flight deals and providing additional information on New Zealand as a holiday destination can help prompt ACs to book; additionally given annual leave constraints there is an opportunity to leverage shorter stay itineraries

Barriers to booking holiday to New Zealand

AC Monitor | Current 5M vs. Previous 6M | ACs who are ready to book, but haven't

	Current 5M	Previous 6 months
Waiting to accrue enough annual leave	30%	30%
Waiting for a deal on flights	29%	45%
I have more research to do about New Zealand as a holiday destination	25% ▲	4%
Waiting for the right life circumstances to travel	19%	17%
Waiting for a good package deal on flights and accommodation	18%	17%
Don't have time to plan the trip at the moment	17%	16%
Don't have enough time to experience it properly	11%	0%
I can't afford it at the moment	11%	22%
I'm still deciding on what time of year I want to travel	10%	18%
Visa process is confusing / difficult	9%	5%
New Zealand is too far away / the flight is too long	5%	10%
It's too expensive to travel to New Zealand	3%	10%

Low sample size (n<50). Interpret with caution



KANTAR

Sample size: Current 5M n = 22 | Previous 6M n = 28
Question "What is stopping you from making a booking?"

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

NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

While travel aggregators are the most popular channel to book accommodation and activities, airline websites provide an opportunity to influence ACs looking to book flights, and local transport providers play a key role in shaping decisions related to transport

Note: This is claimed future behaviour in the survey, and as such, there are explainable differences with other data sources such as IATA, which record actual behaviours.

Likely sources to use to book trip elements for a New Zealand holiday

AC Monitor | Current 5M | Total Active Considerers

Flights

Flights	Current 5M	Previous 6M
Airline websites / apps	36% ▼	45%
Travel aggregator websites / apps	29%	23%
Travel agent (online or offline)	21%	16%
Tour operators / packaged tour	9%	9%
Other	0%	2%
Don't know	5%	6%

Accommodation

Accommodation	Current 5M	Previous 6M
Travel aggregator websites / apps	32%	35%
Directly with the hotel / motel / resort provider	17%	17%
Travel agent (online or offline)	14%	16%
Airline websites / apps	13%	10%
Directly with a short term rental / home stays	11%	9%
Tour operators / packaged tour	9%	6%
Other	1%	2%
Don't know	4%	6%

Activities

Activities	Current 5M	Previous 6M
Travel aggregator websites / apps	27%	24%
Directly with local tourism operator	17%	16%
Visitor / tourist information centre(s) in New Zealand	17%	15%
Part of a tour / packaged deal	12%	10%
Travel agent (online or offline)	11%	15%
Through the hotel / accommodation provider	10%	7%
Other	1%	1%
Don't know	5% ▼	12%

Transport

Transport	Current 5M	Previous 6M
Directly with the transport provider	28%	31%
Travel aggregator websites / apps	21%	15%
Travel agent (online or offline)	14%	17%
Visitor / tourist information centre(s) in New Zealand	12%	7%
Directly with the hotel / accommodation provider	11%	7%
Airline websites / apps	8%	12%
Other	0%	2%
Don't know	6%	9%

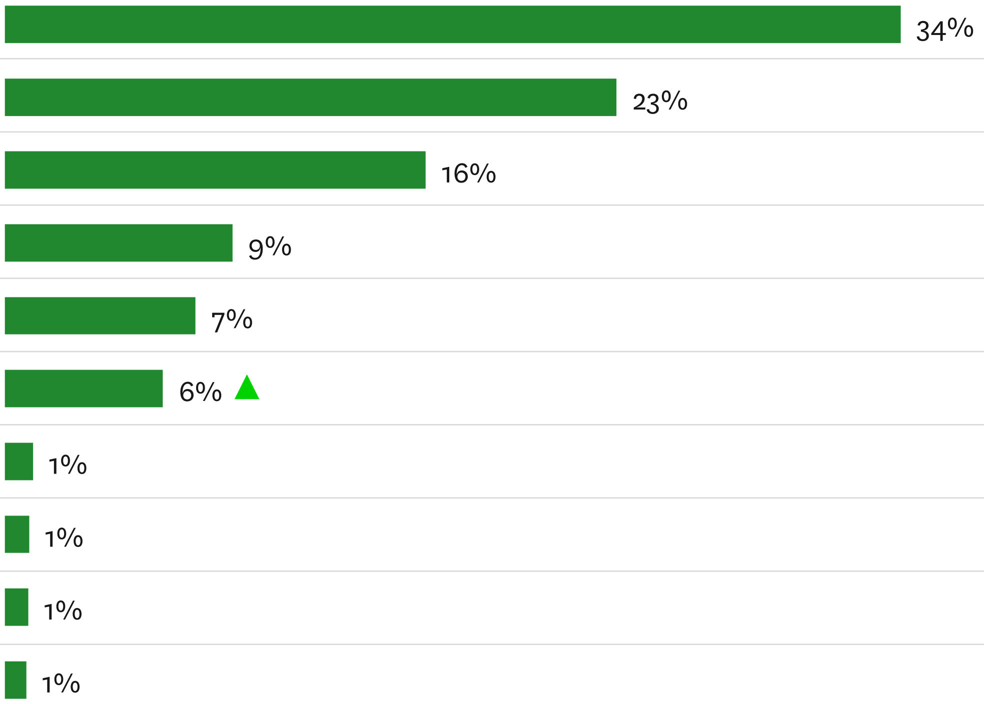
▲▼ *Significantly higher / lower than previous period at 95%*

Sample size: Current 5M n = 450 | Previous 6M n = 150
Question "If you were to travel to New Zealand for a holiday, how would you be most likely to book... your flights to get there? accommodation? activities and experiences? transport within New Zealand?"
Examples provided for 'Travel aggregator websites / app': Booking.com, Expedia, Skyscanner (flights only), Google Flights (flights only), Agoda (accommodation only)
Examples provided for 'Directly with a short term rental / home stay': Airbnb (accommodation only)

Australian ACs are more inclined to travel to New Zealand in smaller groups, with 34% likely to travel with a partner and a further 16% travelling alone; 23% would most likely travel as a family with dependent children

Likely travel party for a New Zealand holiday

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



	Current 5M	Previous 6 months
Partner / spouse	34%	36%
Family - with dependent children under 18yrs	23%	24%
Travel alone	16%	14%
A small group of friends (1-5 others)	9%	10%
Family - but no children under 18yrs	7%	8%
Travel alone but I'd meet friends / family there	6% ▲	3%
Mix of friends and family with non-dependent children	1%	1%
A large group of friends (6+ others)	1%	1%
Strangers on an organised group tour	1%	0%
Mix of friends and family with dependent children	1%	1%

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

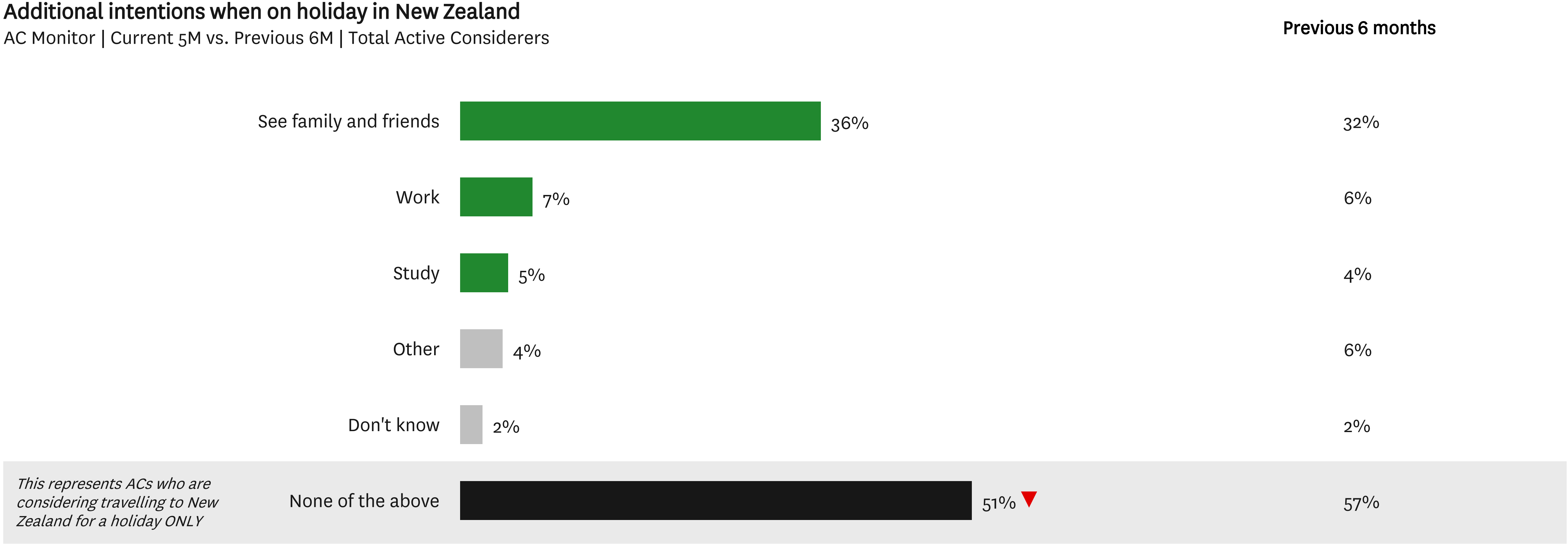
Sample size: Current 5M n = 750 | Previous 6M n = 900

Question "Who are you most likely to travel with on your trip to New Zealand?"

Half of the AC pool intend to visit New Zealand for a holiday only – this is lower than in the previous six months, as more ACs combining their holiday with family visit

Additional intentions when on holiday in New Zealand

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



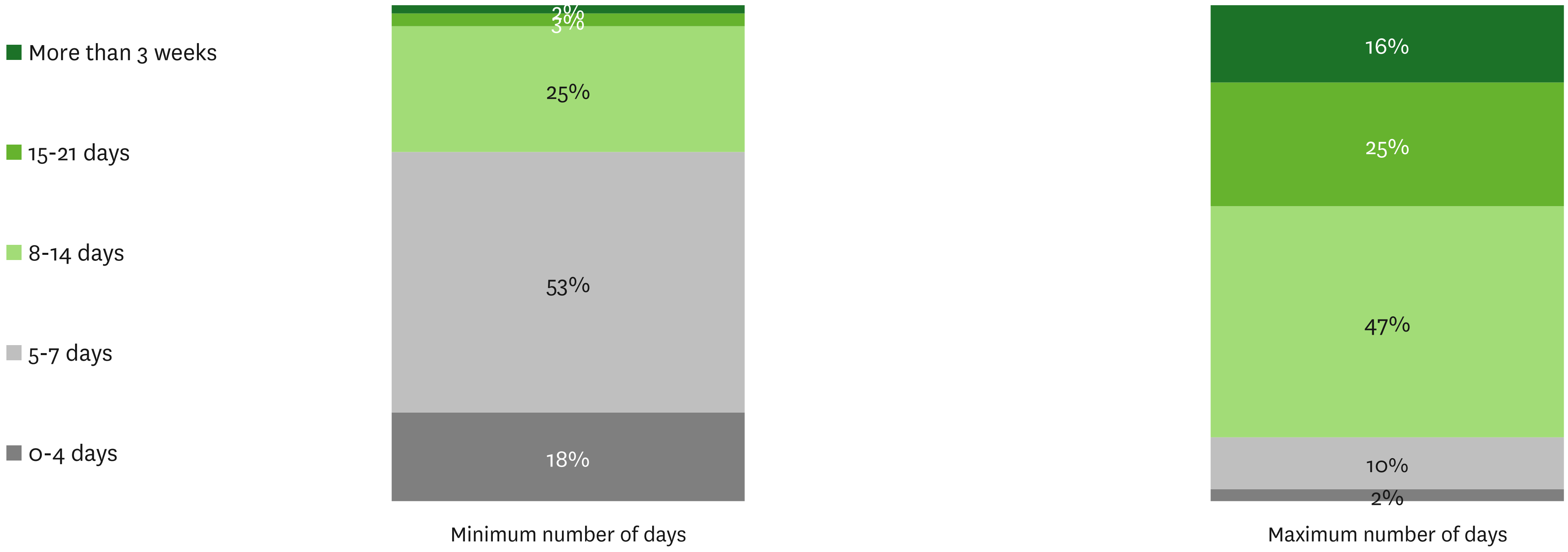
Significantly higher / lower than previous period at 95%

Sample size: Current 5M n = 750 | Previous 6M n = 900
Question "When considering travelling to New Zealand for a holiday, do you also intend to…"

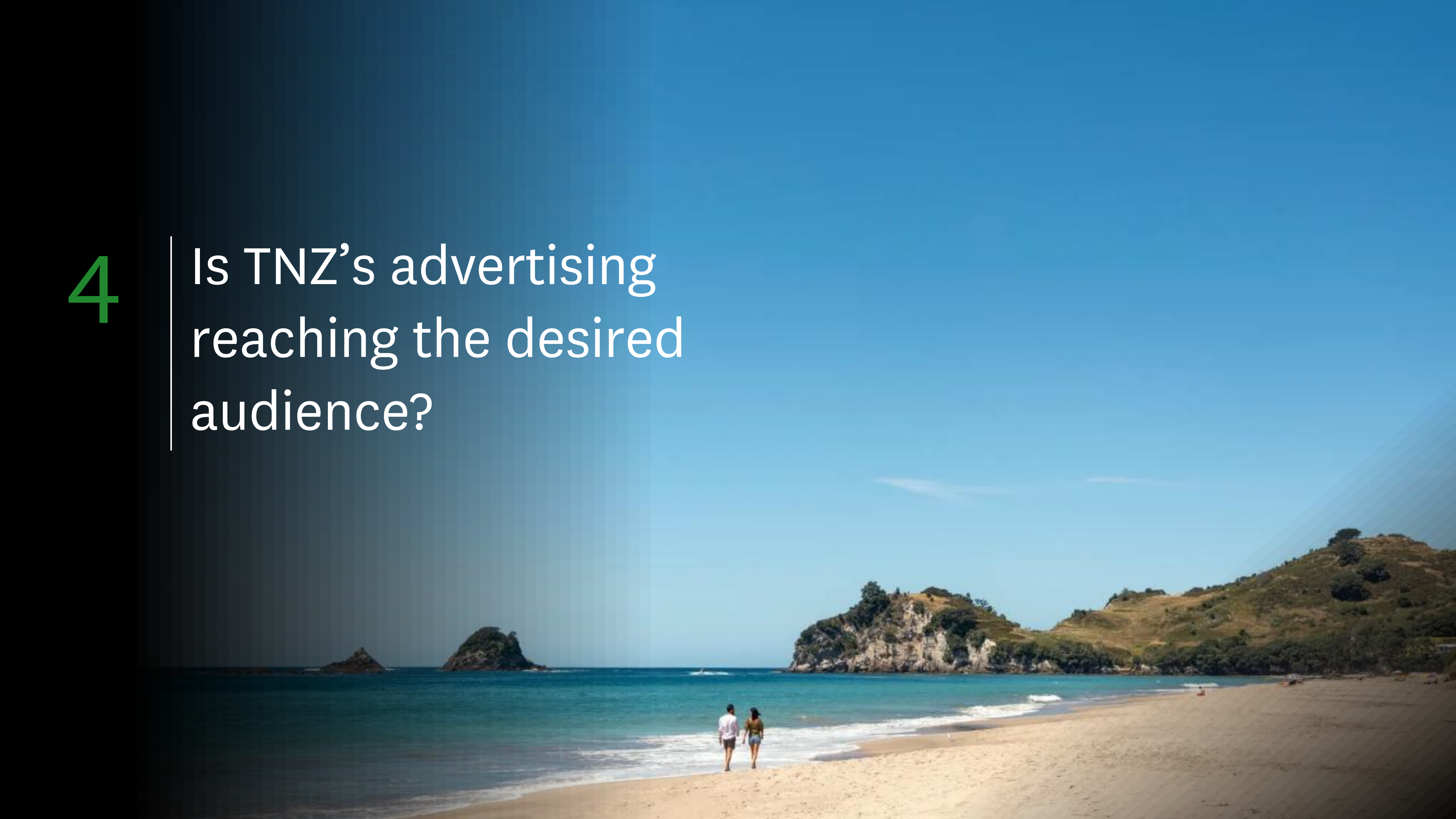
Most Australians are looking to spend between 5 – 14 days while on holiday in New Zealand

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

AC Monitor | Current 5M | Total Active Considerers



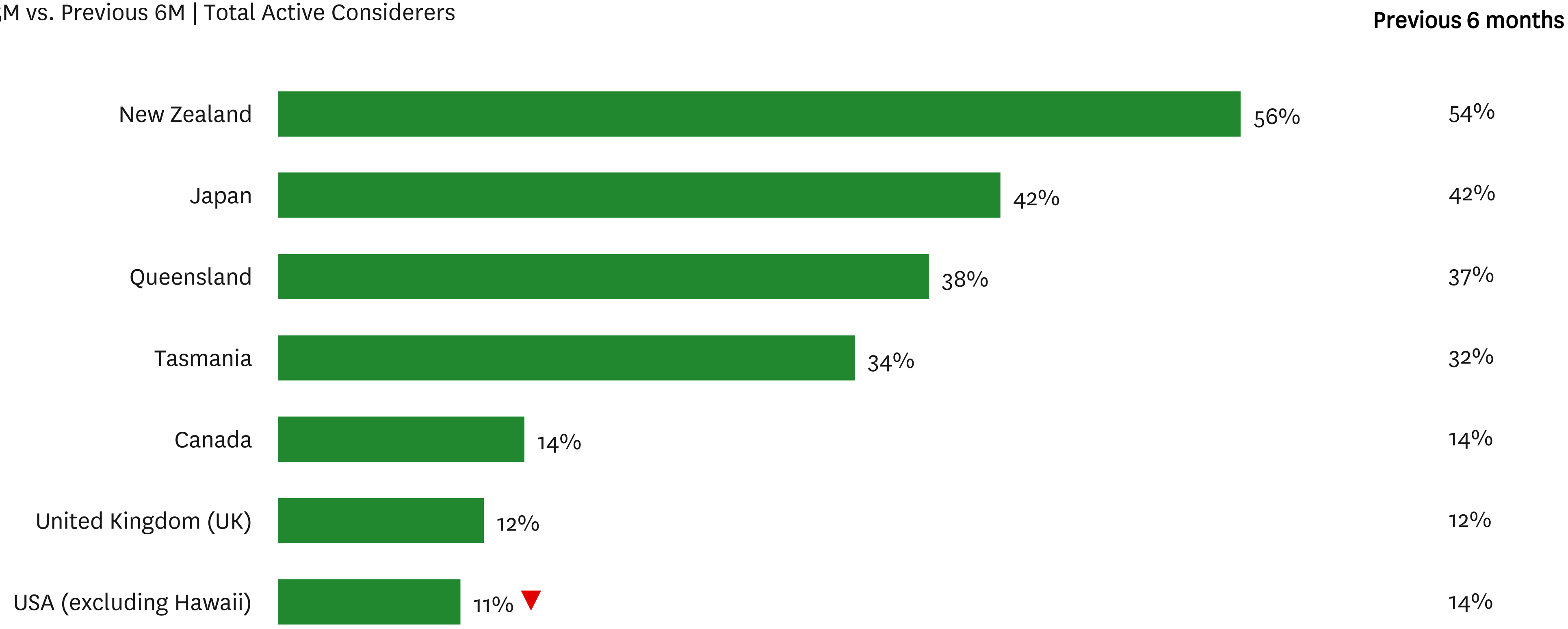
4 Is TNZ’s advertising reaching the desired audience?



Destination New Zealand advertising continues to achieve the highest levels of recall compared to other competitor destinations

Holiday destinations seen advertised or promoted recently (Prompted Awareness)

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



Significantly higher / lower than previous period at 95%

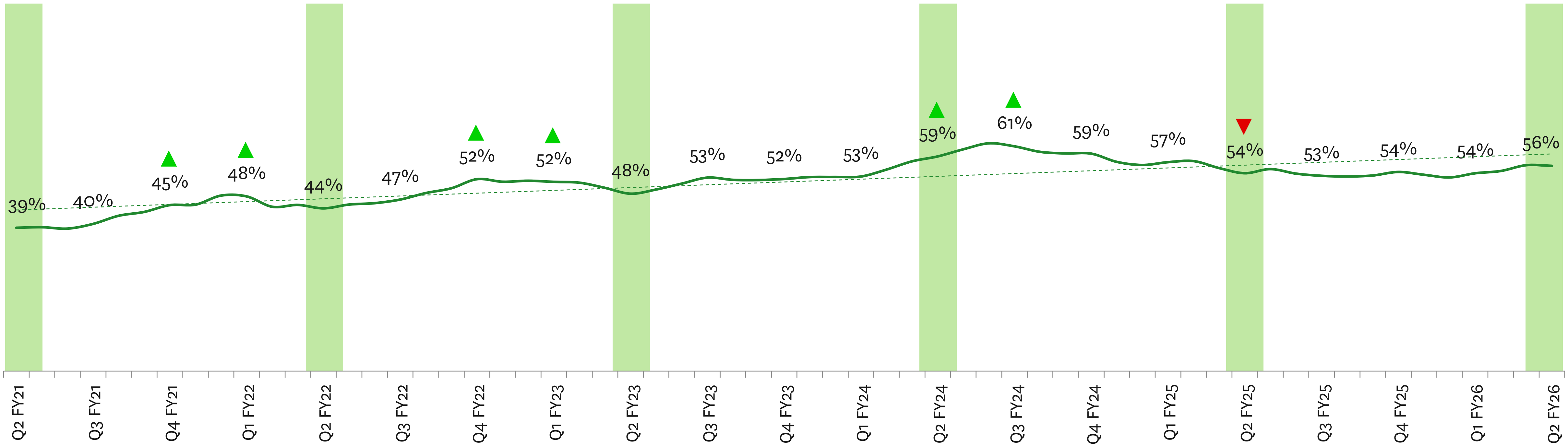
Sample size: Curret 5M n = 750 | Previous 6M n = 901

Question "Which of these holiday destinations have you seen advertised or promoted recently?"

Recall of Destination New Zealand advertising has remained stable over the past year, although has yet to reach the peaks achieved during FY24

Seen New Zealand advertised or promoted recently (Prompted Awareness)

AC Monitor | 6MRA | Total Active Considerers



Significantly higher / lower than six month prior at 95%

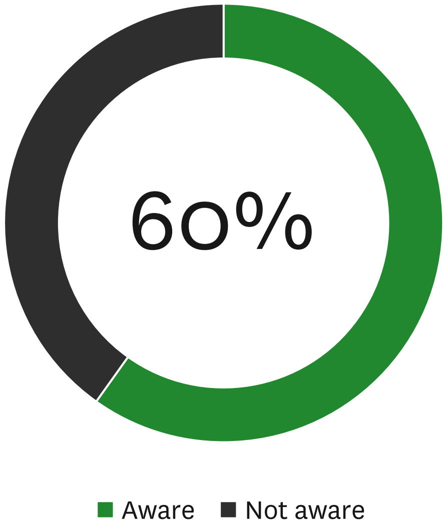
Sample size: Q2 FY21 – Q2 FY26 (6MRA) minimum n = 750 maximum n = 1053
Question "Which of these holiday destinations have you seen advertised or promoted recently?"

Over half of Australian ACs claimed prompted awareness of newzealand.com and 100% Pure New Zealand

Asset awareness

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

100% PURE NEW ZEALAND



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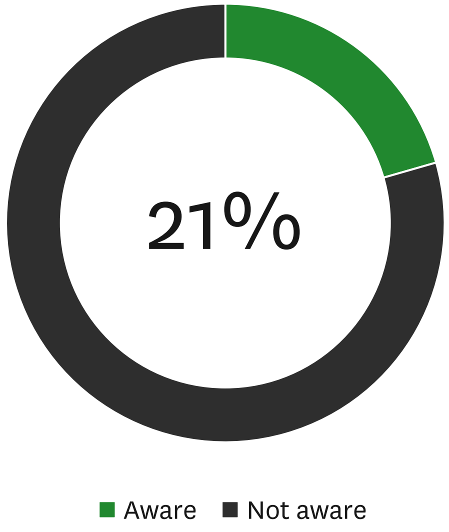
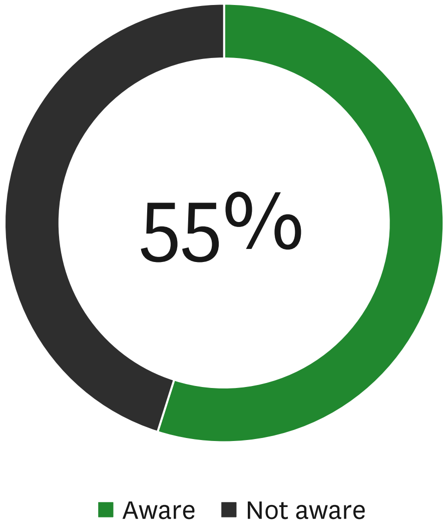
CARE FOR NEW ZEALAND



newzealand.com

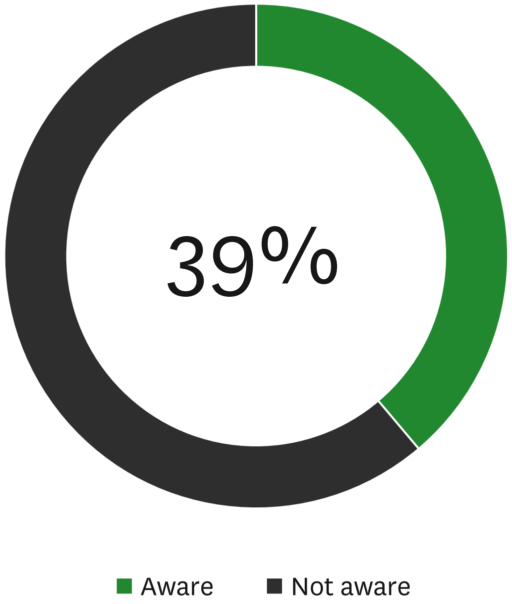


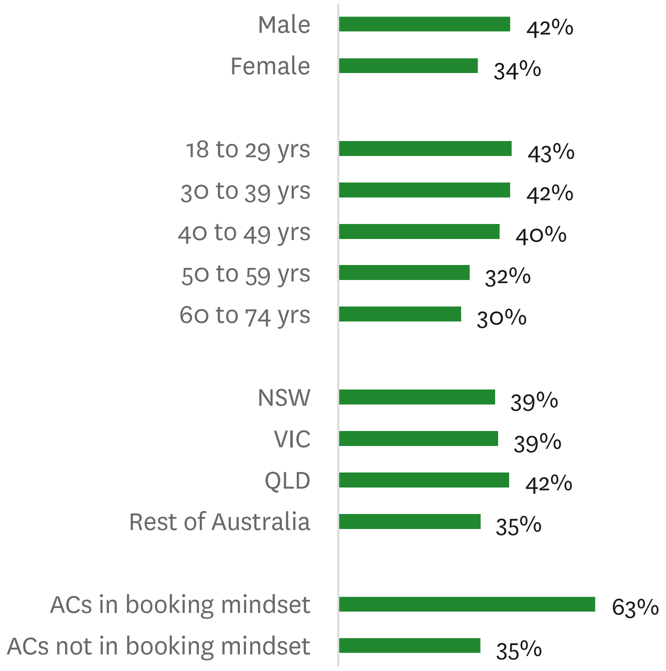
Previous 6M	62%	20%	52%

39% have seen the Ariki campaign ad, with a significantly greater number of males, and those in the booking mindset having seen the ad

Ariki Campaign awareness

AC Monitor | Current 5M | Total Active Considerers





Sample size: Current 5M n = 750 | Male n = 372 | Female n = 377 | 18-29 n = 202 | 30-39 n = 169 | 40-49 n = 131 | 50-59 n = 127 | 60-74 n = 121 | NSW n = 234 | VIC n = 212 | QLD n = 143 | Rest of Australia n = 161 | ACs in booking mindset n = 94 | ACs not in booking mindset n = 656
Question “Have you seen this ad?”

5 | Appendix

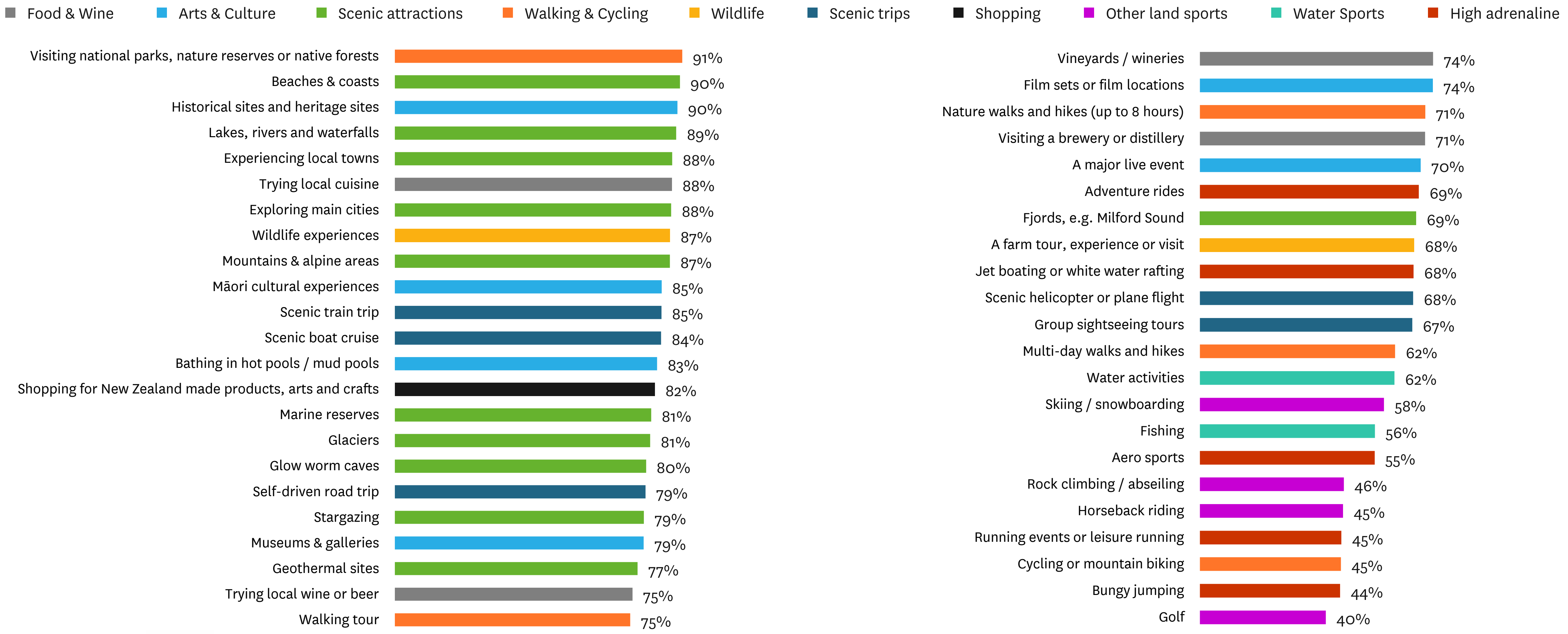
Knowledge gaps (full list)

AC Monitor | Current 5M | Total Active Considerers

Sample size: Total ACs n = 450
Question "Putting thoughts about costs aside, what are some of the concerns you have about choosing New Zealand for your next holiday?"

Activities interested in doing in New Zealand (full list)

AC Monitor | Current 5M | Total Active Considerers

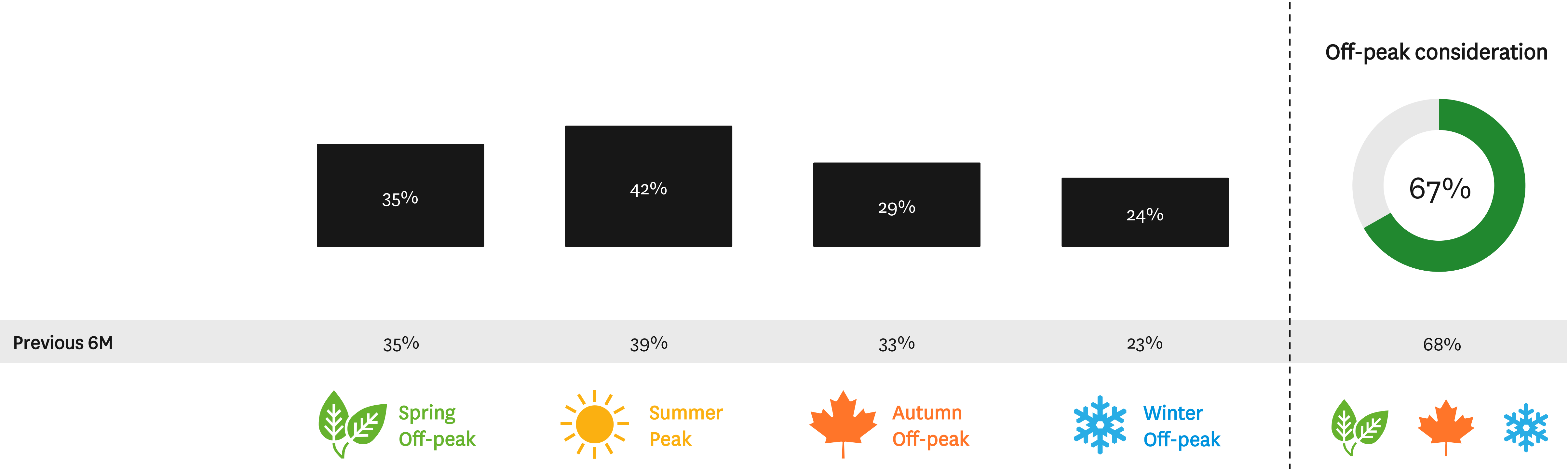


Sample size: Total ACs n = 300
Question "Which of the following would you be interested in seeing or doing when on holiday in New Zealand?"

Summer remains the most considered time to visit New Zealand, and two-thirds of AC would consider travelling to New Zealand during off-peak seasons

Seasons – Consideration

AC Monitor | Current 5M | Total Active Considerers



Significantly higher / lower than previous period at 95%

Sample size: Current 5M n = 750 | Previous 6M n = 900

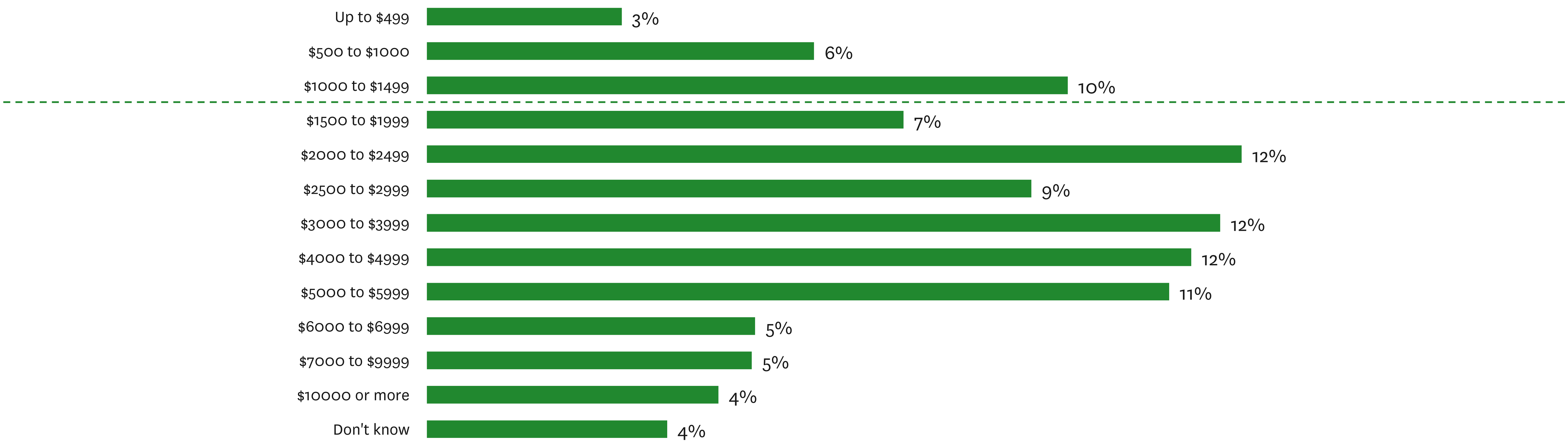
Question: "At what time(s) of year would you consider visiting New Zealand?" When would you prefer to visit New Zealand?"

Spring = Sep, Oct, Nov | Summer = Dec, Jan, Feb | Autumn = Mar, Apr, May | Winter = Jun, Jul, Aug

Amongst Australians who agree that New Zealand is a preferred holiday destination, 19% do not meet the current spend threshold of $1,500 AUD

Spend on holiday in New Zealand

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



KANTAR

Sample size: n = 992

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"

NEW ZEALAND TOURISM 100% PURE NEW ZEALAND

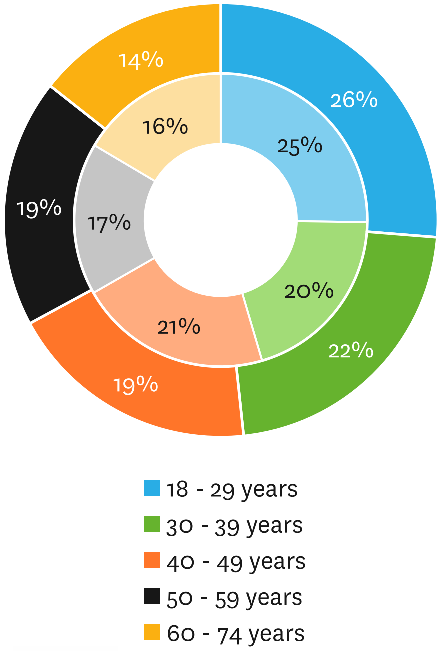
The profile of those who find New Zealand appealing is comparable to those who do not

Profile of those who find New Zealand highly appealing

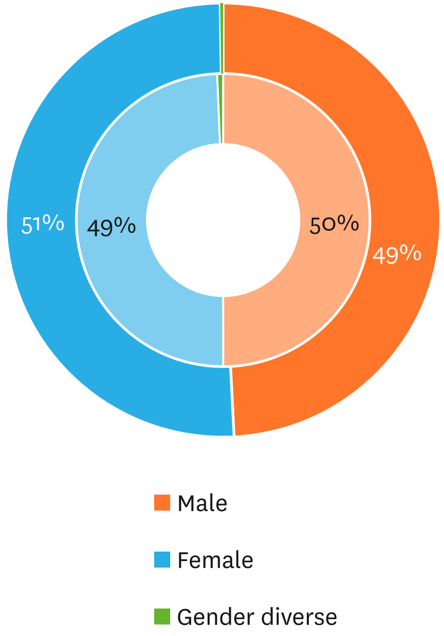
AC Monitor | Current 5M | Those who find New Zealand highly appealing vs. not

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

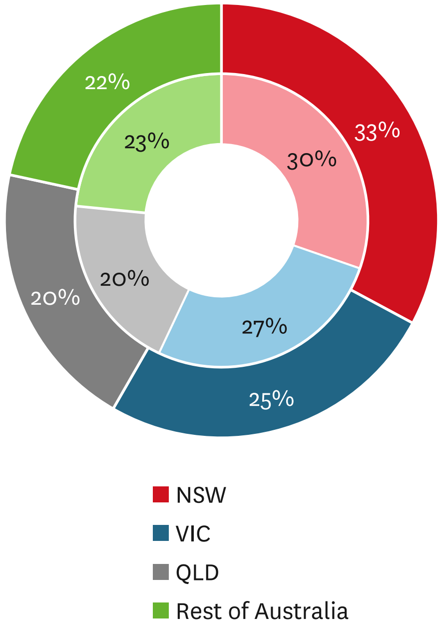
By age segment



By gender



By region



KANTAR

Sample size: Those who find New Zealand highly appealing n = 1791 | Those who do not find New Zealand highly appealing n = 1154

Significantly higher / lower than those who do not find New Zealand appealing at 99%

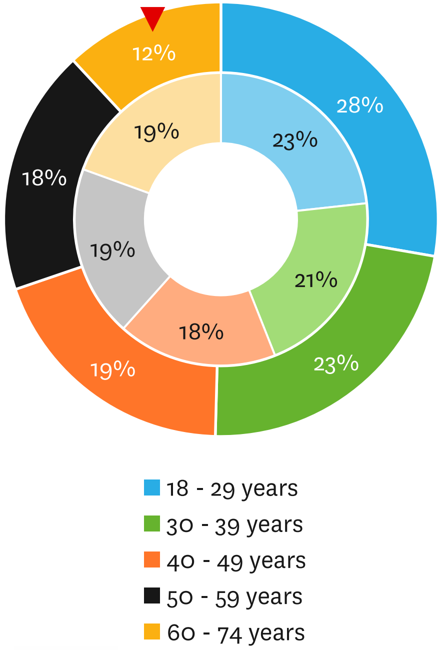
NEW ZEALAND TOURISM | 100% PURE NEW ZEALAND

Compared to non-considerers, the profile of serious considerers in Australia shows a smaller proportion of those aged 60-74 years

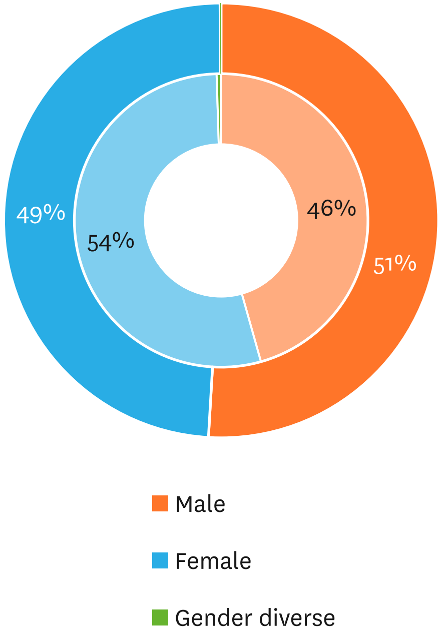
Profile of those who would seriously consider visiting New Zealand
AC Monitor | Current 5M | Those who find New Zealand highly appealing

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

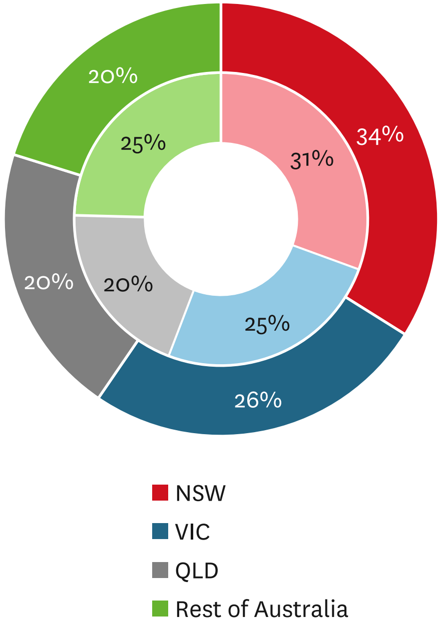
By age segment



By gender



By region



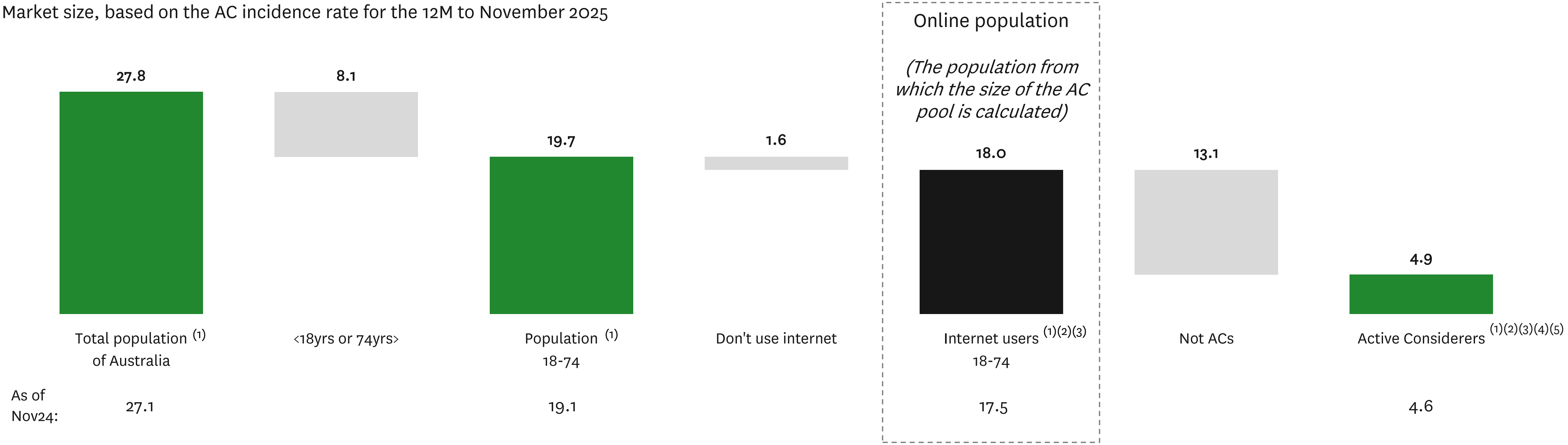
Sample size: Those who would seriously consider visiting New Zealand n = 1173 | Those who would not seriously consider visiting New Zealand n = 618

Significantly higher / lower than those who would not seriously consider visiting New Zealand appealing at 99%

Out of an online population of approximately 18.0 million people, 4.9 million are classified as ACs based on the 12MR to Nov 25

Nov 25 | Million people

Market size, based on the AC incidence rate for the 12M to November 2025



SOURCES/NOTES:

(1) Australian Bureau of Statistics, Australian Demographic Statistics, Table 8 Estimated resident population, by age and sex; Time period: 1 November 2025; Coverage: All Australian residents
(2) Australian Bureau of Statistics, Population clock; Time period as at 1 November 2025
(3) Kantar Population Profiler, Internet usage by age; Time period: 2025
(4) Tourism New Zealand, Active Considerer Monitor Australia; Time period: Jul-Nov 2025, under the latest AC definition
(5) Kantar Analysis

Appendix: Brand positioning 'how to'

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

- A score of 100 means performance is in line with expectations after adjusting for bias
- Above 100 indicates a relative strength
- Below 100 indicates a relative weakness

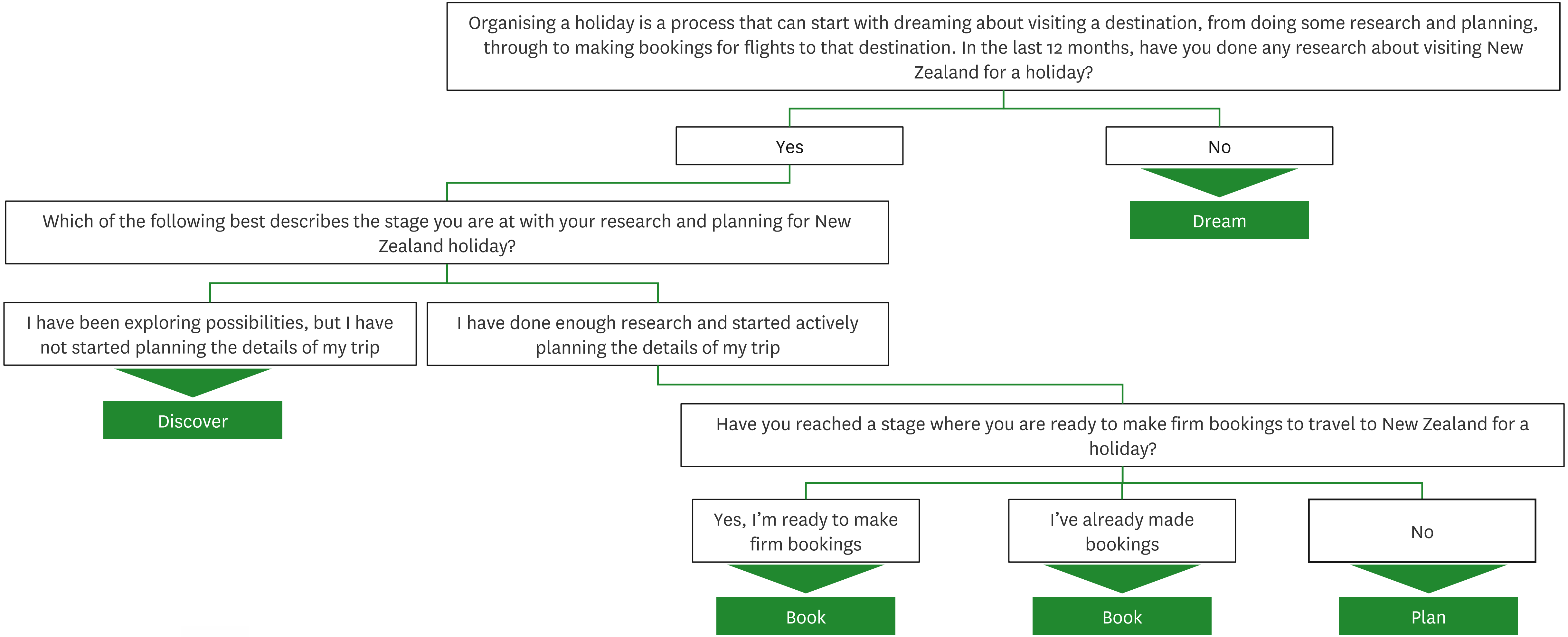
Scores are **relative**, i.e. removing / adding attributes and / or destinations from the analysis would give different scores

Brand associations	New Zealand	Japan	Australia	Taiwan	South Korea	Thailand
Spectacular natural landscapes and scenery						
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 ...



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 year-round	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 & welcoming	The locals are friendly and welcoming to all visitors
Fun & enjoyment	Ideal for having fun and enjoying yourself
Iconic attractions	Has iconic attractions and landmarks
Wildlife experiences	Has amazing wildlife experiences

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