

**KANTAR**

**Active Considerer  
(AC) Monitor  
UK & Germany (H1 FY26)**

Report

December 2025



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

# AC Monitor research specifications

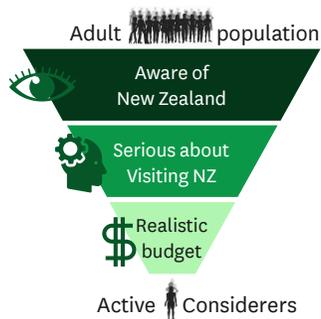


Kantar conducts a **monthly online survey** in eight of Tourism New Zealand’s markets:

- 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

# UK's economic stability contrasts with consumer uncertainty - consumers are showing uncertainty and reluctance to commit to bookings



## MARKET CONTEXT



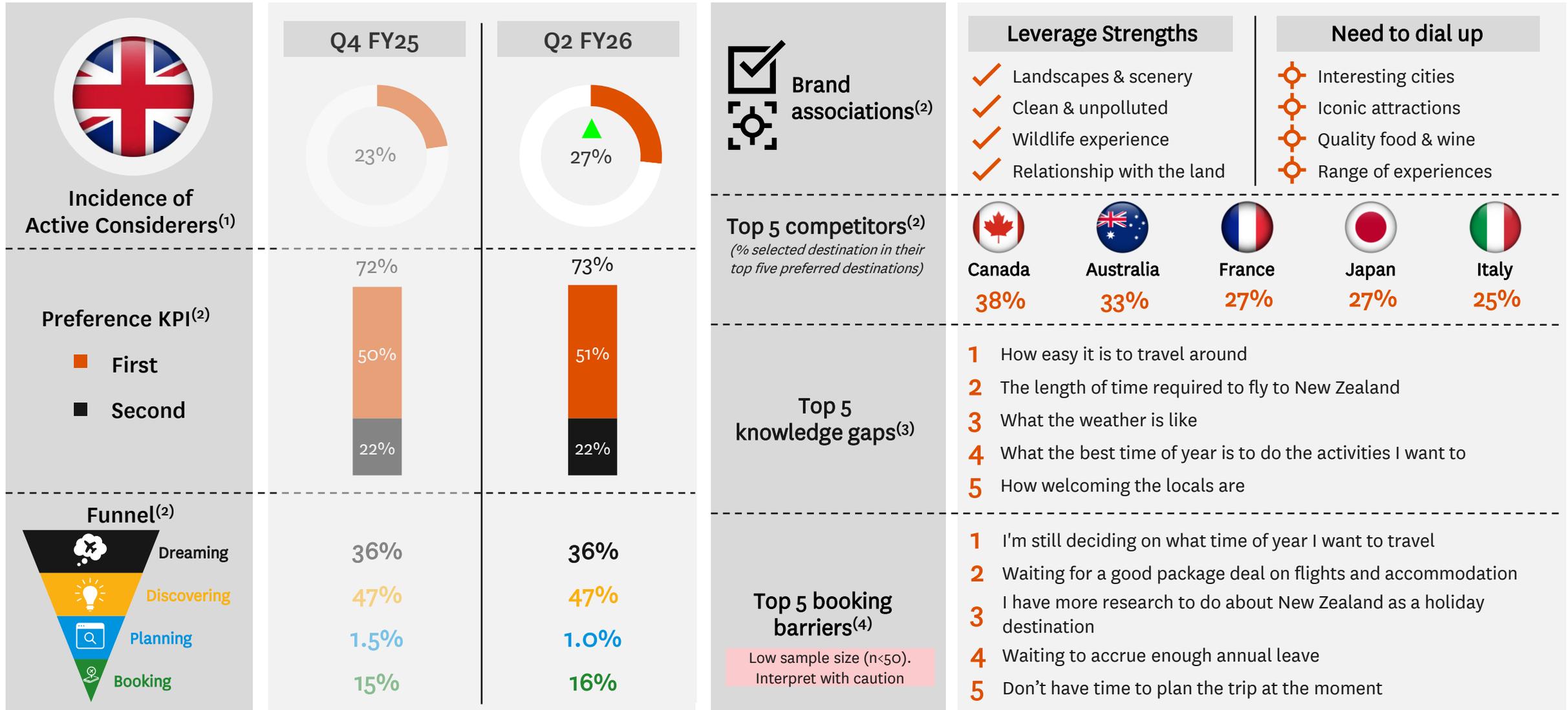
- **Modest Growth Ahead:** The UK economy remains stable, and with a positive outlook. GDP up +1.4% in Q2 2025 and unemployment at 4.8%, reflecting a relatively healthy labour market. Inflation is moderating, but cost-of-living pressures persist.
- **Consumer Behaviour:** While economic fundamentals are steady, consumer confidence is fragile. Consumers are showing uncertainty and reluctance to commit to bookings, leading to longer consideration periods and the emergence of a late booking market. This trend suggests travellers are waiting for deals and flexibility before confirming plans

## TRAVEL DEMAND



- **Outbound Travel Demand is Resilient:**
  - **Demand continues to grow after full recovery:** outbound tourism is projected to hit 92 million in 2025, the highest number ever recorded, marking a 360% recovery since 2021.

# Performance Dashboard



# Key insights



- The AC incidence has increased from 23% to 27% over the last year, with a pool of 12.2 million ACs in the UK, offering a sizable opportunity to drive arrivals
- 16% of ACs in the UK claim to be in the booking mindset in the most recent period, and this has remained stable over the past year
- Both first choice and top two preference for New Zealand are well above levels seen a year ago, so the focus should be on capitalising this strong preference by addressing key barriers to conversion
- New Zealand's key competitors are Canada, Australia, and France. To standout, brand messaging should:
  - Leverage New Zealand's strengths, such as our landscapes & scenery, clean & green image and wildlife experiences which are stronger drivers of preference in 2025
  - Enhance New Zealand's competitive edge on other strategic drivers like interesting cities, iconic attractions, quality food & wine and range of experiences on offer
- Tactical communications should amplify brand strengths and ease frictions such as how to travel around New Zealand, flight duration and weather concerns. These messages should surface as early as the dreaming phase. To convert bookers, greater emphasis should be placed on the quality and variety of food and beverage options.
- Wildlife experiences are the most sought after activity for ACs, however promoting activities revolving around scenic attractions would help strengthen New Zealand's perceived lack of iconic attractions
- Travel aggregators are the most popular channel for booking trip elements, however travel agents also provide an opportunity to influence ACs' trip decisions

# Germany's fragile economy and subdued consumer confidence could temper outbound travel demand, especially for long-haul destinations



## MARKET CONTEXT



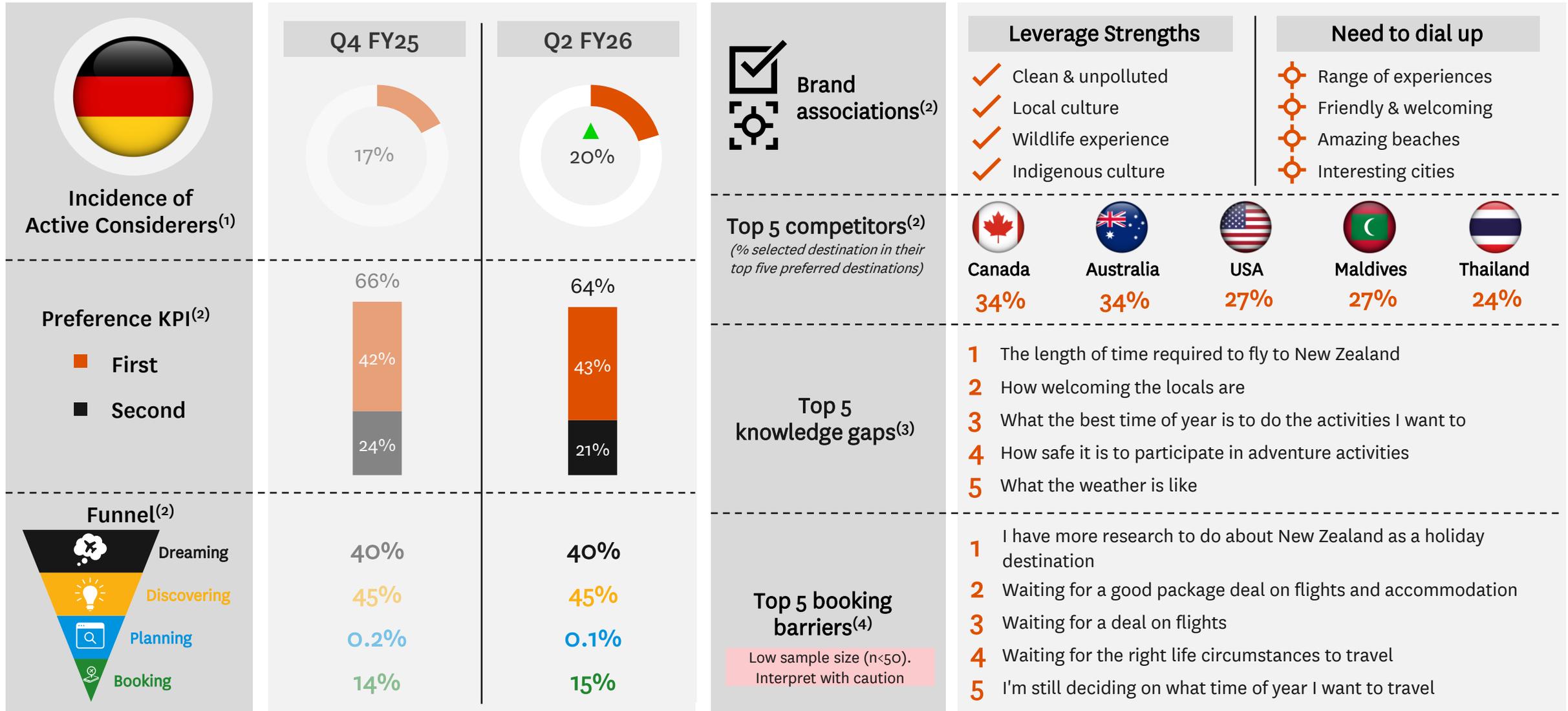
- **Fragile Economy:** Germany's economy is showing signs of softness, with little growth, reflecting stagnation amid global uncertainty. Inflation has eased, but cost pressures persist
- **Labour Market Strains:** unemployment has edged up to 6.3%, indicating reduced labour demand and ongoing economic sluggishness
- **Consumer Pessimism:** confidence remains subdued, dampening discretionary spending and potentially curbing long-haul travel demand, including to destinations like New Zealand. Consumers are prioritising value and shorter booking windows, with a cautious approach to big-ticket travel

## TRAVEL DEMAND



- **Outbound Travel Demand is Resilient for now:**
  - Outbound trips hit a record in 2024 (+12% YoY), and spending continues to rise in 2025 (+4% YTD), signaling sustained demand for international travel. However, persistent cost pressures could temper growth despite strong intent

# Performance Dashboard



1. Sample size: Online population Q4 FY25 (6M) n = 6505 | Q2 FY26 (5M) n = 4546  
 2. Sample size: ACs Q4 FY25 (6M) n = 676 | Q2 FY26 (5M) n = 525  
 3. Sample size: ACs Q2 FY26 (5M) n = 450  
 4. Sample size: ACs Q2 FY26 (5M) n = 32

# Key insights



- Over the last year, the appeal of New Zealand has significantly risen from 58% to 61%, leading to growth in AC incidence from 17% to a record 20% - this offers a greater visitation pipeline for the future with 11.8 million ACs
- Top competitors among German ACs are Canada, Australia, USA and Maldives. To stand out from these competitors, brand messaging should:
  - Leverage New Zealand's strengths like cleanliness, local culture, wildlife experiences and indigenous culture
  - Boost perceptions of the range of experiences, friendly & welcoming environment, amazing beaches and interesting cities
- The most common activities of interest are related to historical sites, scenic attractions and local cuisine
- Tactical communications should guide ACs on the ideal time of year for desired activities, highlighting flight duration, welcoming locals, what the weather is like and how safe it is to participate in adventure activities.
- Travel aggregators and travel agents have the greatest ability to influence holiday decisions across all facets of decision making related to bookings
- The majority of ACs would spend at least a week in New Zealand, while 41% are open to travelling for more than 3 weeks



UNITED KINGDOM

1

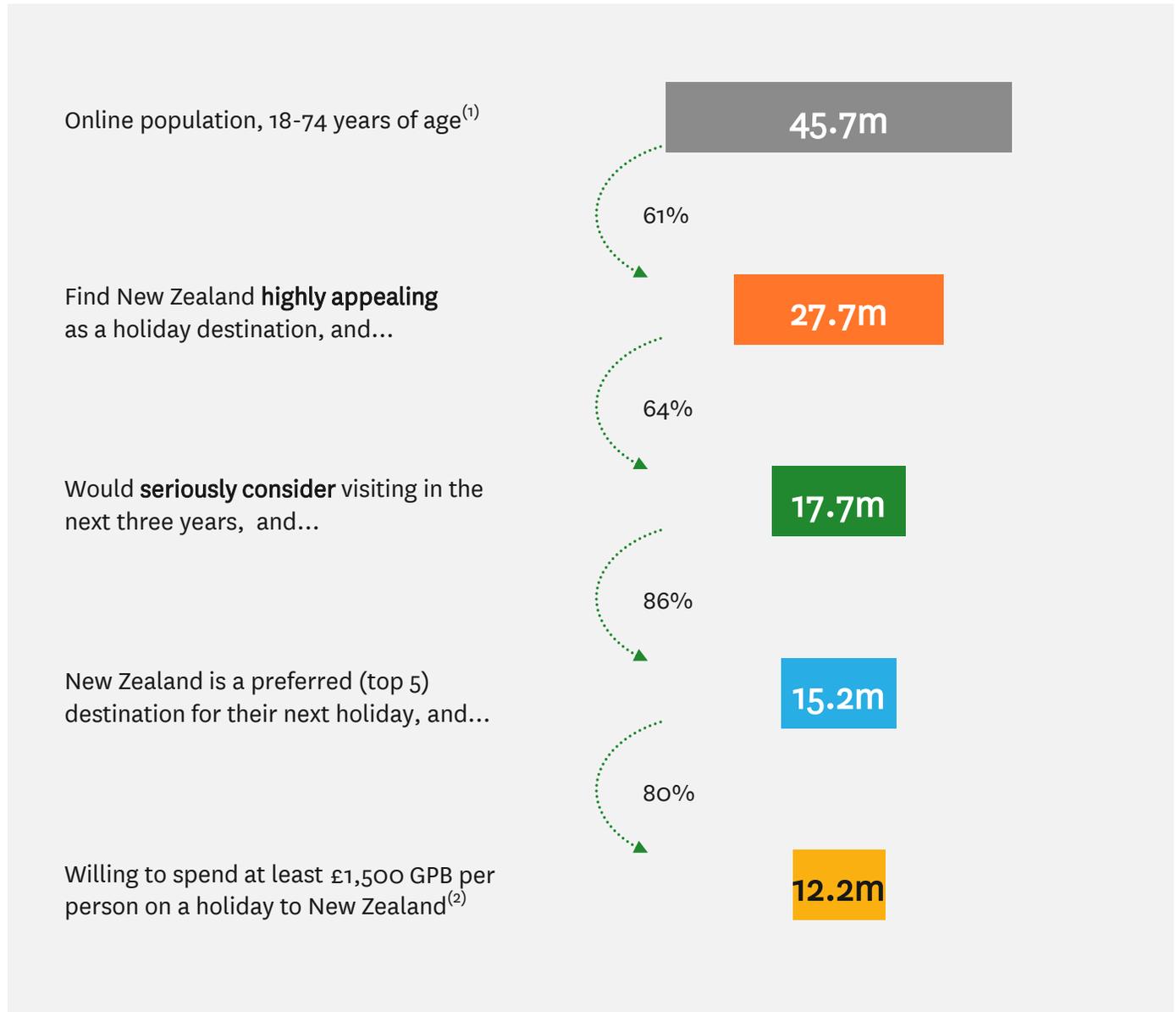
What is the size of  
opportunity in the  
UK?



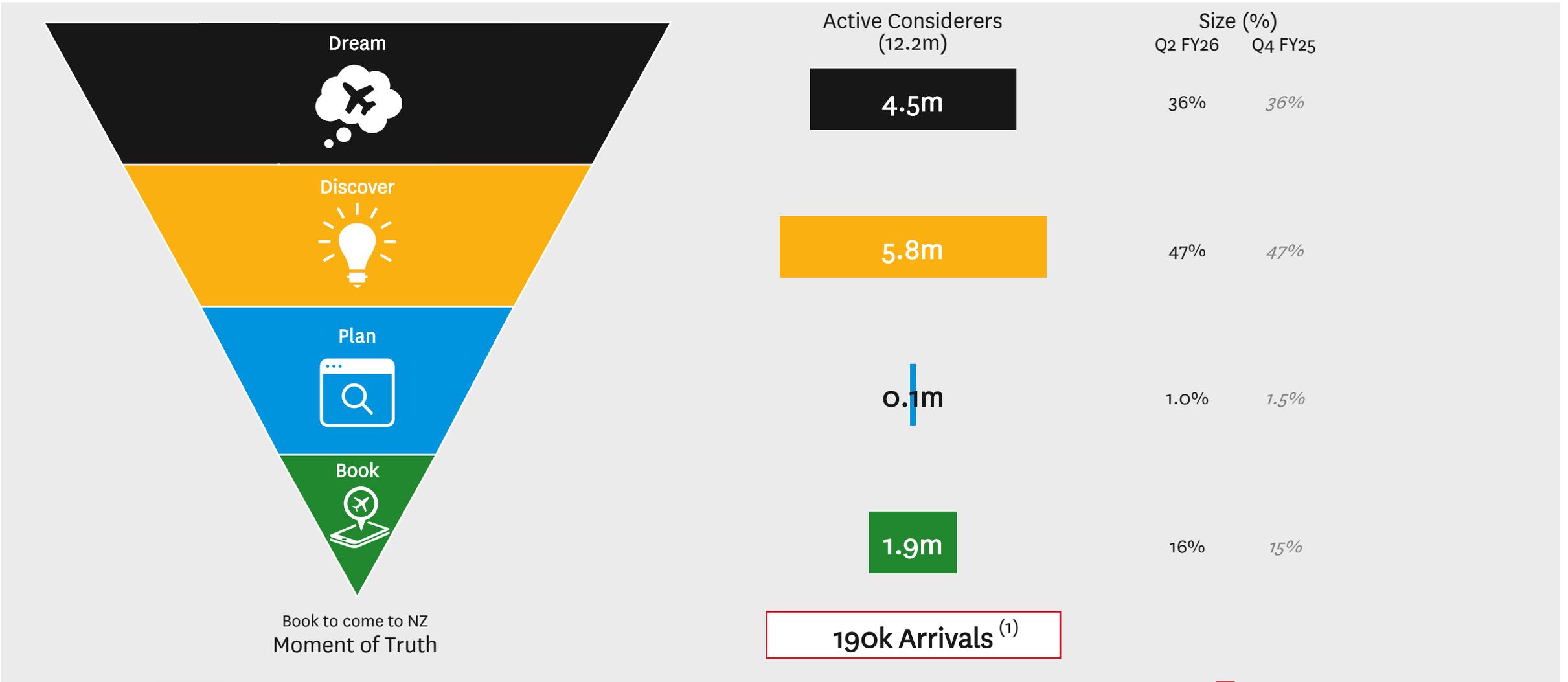
# Active Considerer Funnel – UK

## Active Considerers definition

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



# Journey funnel to New Zealand – UK



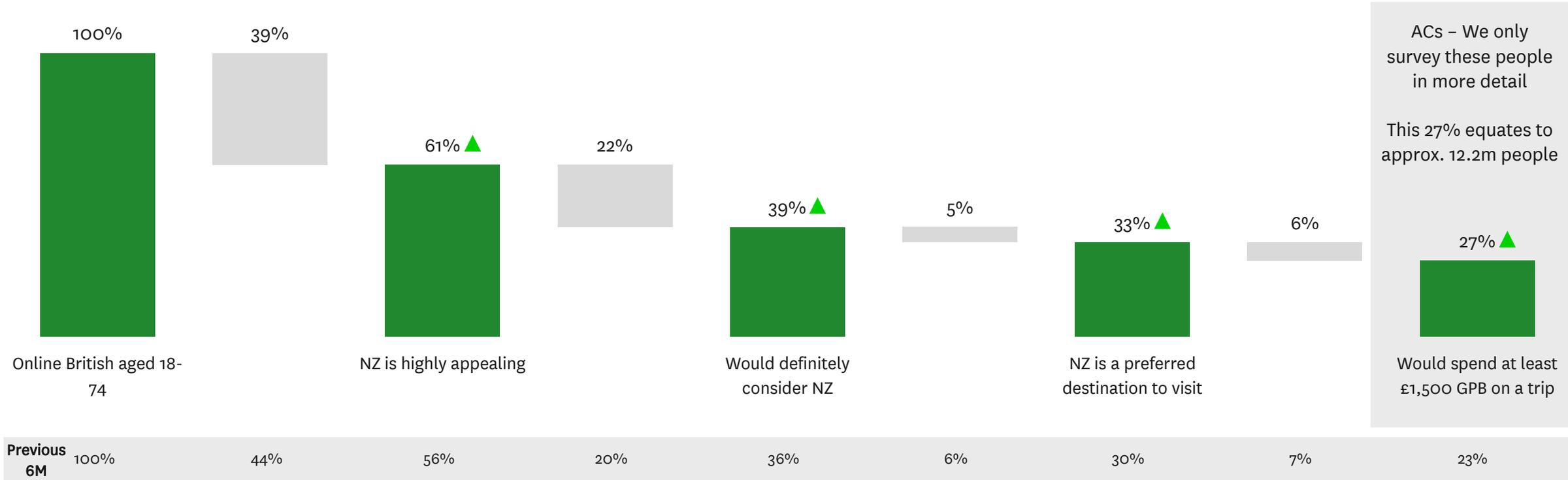
▲ ▼ Significantly higher / lower than previous period

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

# There is a sizeable and growing opportunity in the UK: the AC incidence has significantly increased this period to 27% equating to 12.2 million people

## Qualifying criteria for defining ACs

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



ACs – We only survey these people in more detail

This 27% equates to approx. 12.2m people

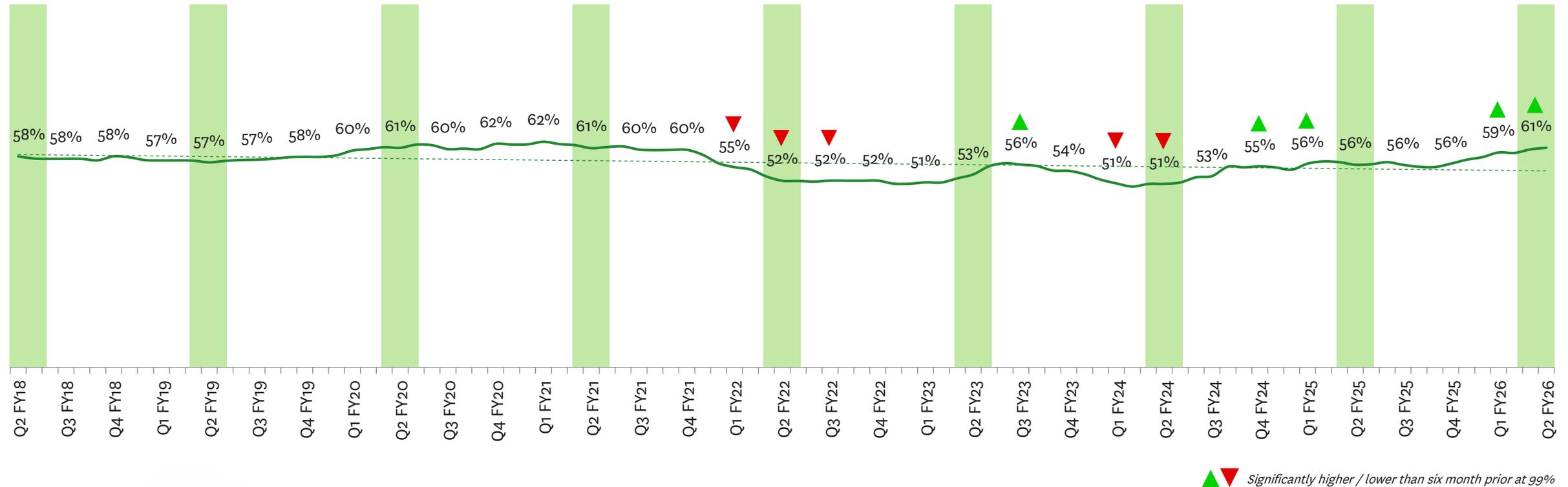
▲ ▼ Significantly higher / lower than six month prior at 99%

# The continuous upward trend in appeal is a significant driver of the overall AC incidence growth

## Appeal

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

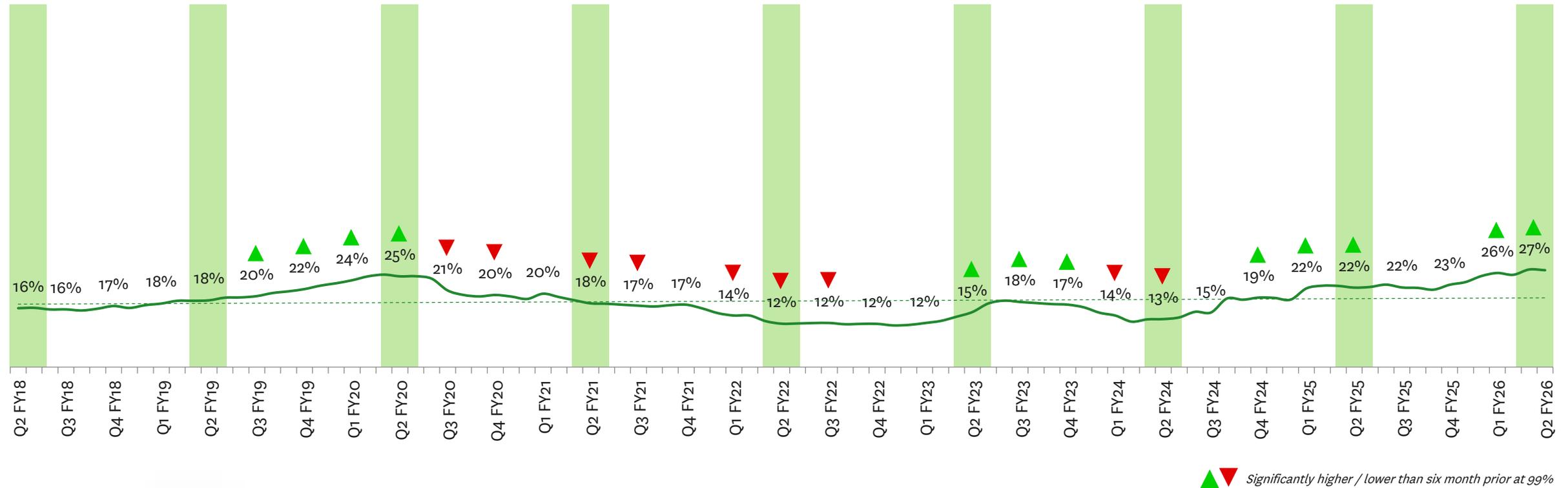
- Appeal is measured among the total online population aged 18 to 74 years old, and is the ‘above the funnel’ measure
- Appeal measures the emotive connection to the brand, irrespective of the barriers people have in converting their appeal to active consideration and arrivals
- Appeal is likely to be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



# Over the past two years, the AC incidence has significantly improved, culminating in our current peak of 27% this period

## Incidence of ACs

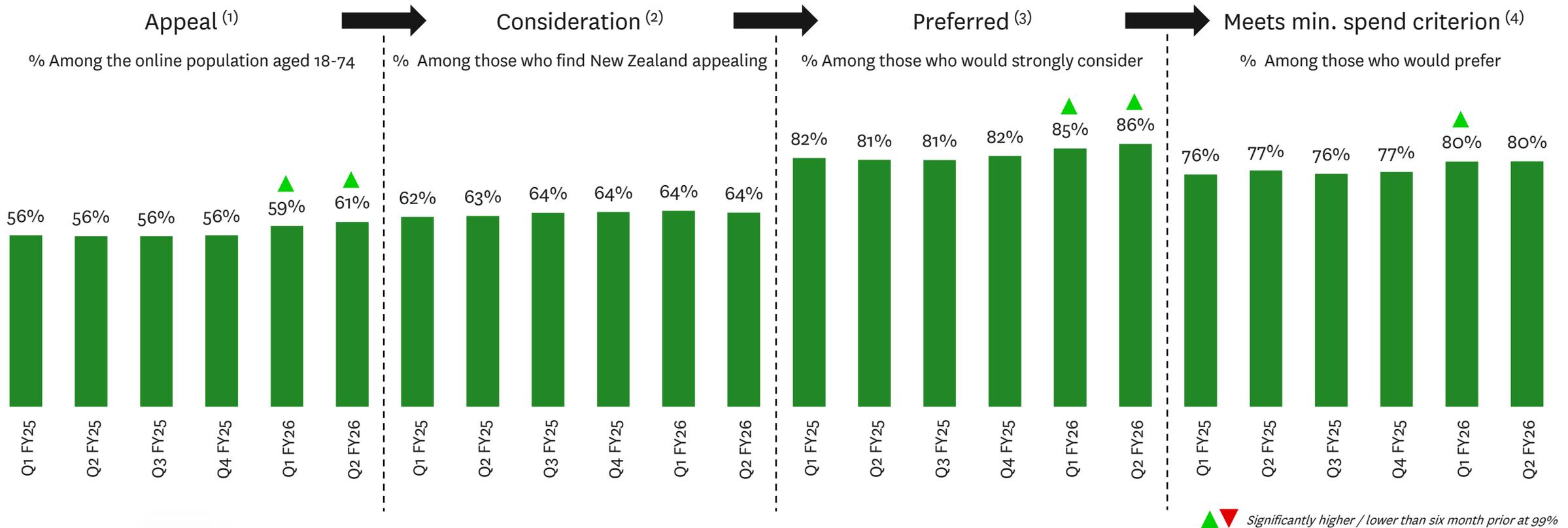
AC Monitor | 6MRA | Target online population aged 18-74



# Appeal, preference and intended spend have experienced significant uplifts in the current financial year

## Conversion of ACs through the Consideration Funnel

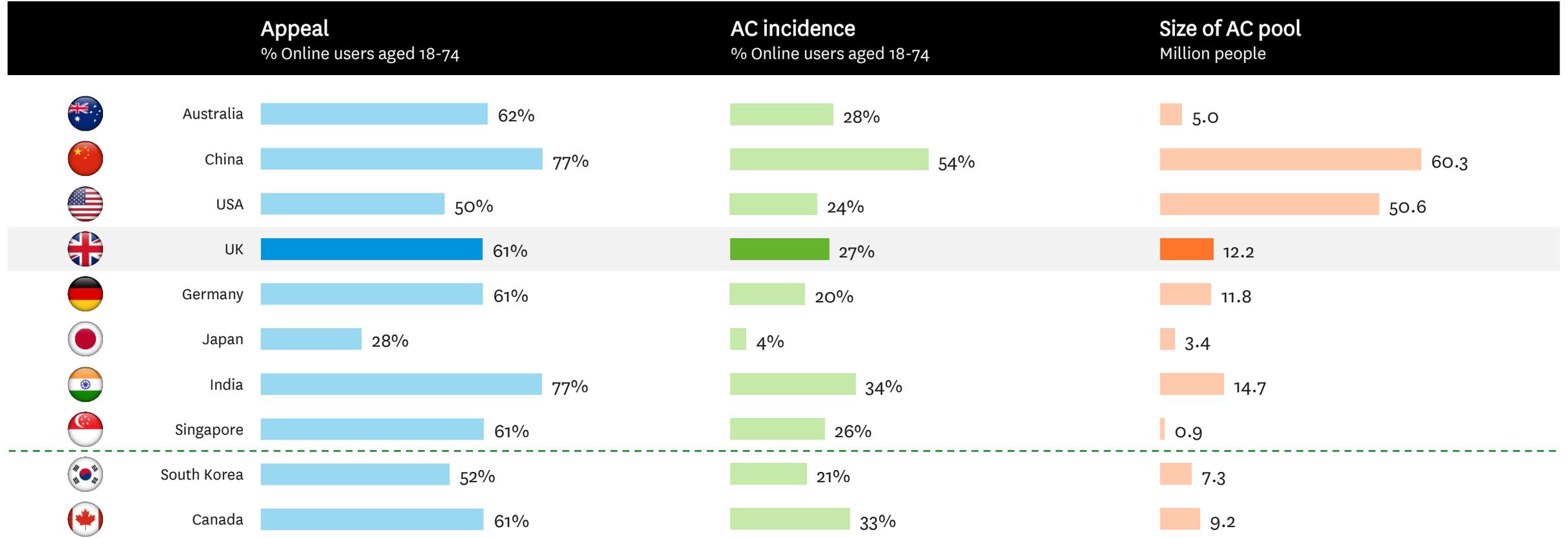
AC Monitor | 6MRA | Target online population aged 18-74



Sample size: Q1 FY25 - Q2 FY26 (6MRA): Appeal minimum n = 3889, maximum n = 5082 | Consider minimum n = 2227, maximum n = 2786 | Prefer minimum n = 1188, maximum n = 1558 | Spend minimum n = 957, maximum n = 1219

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?"

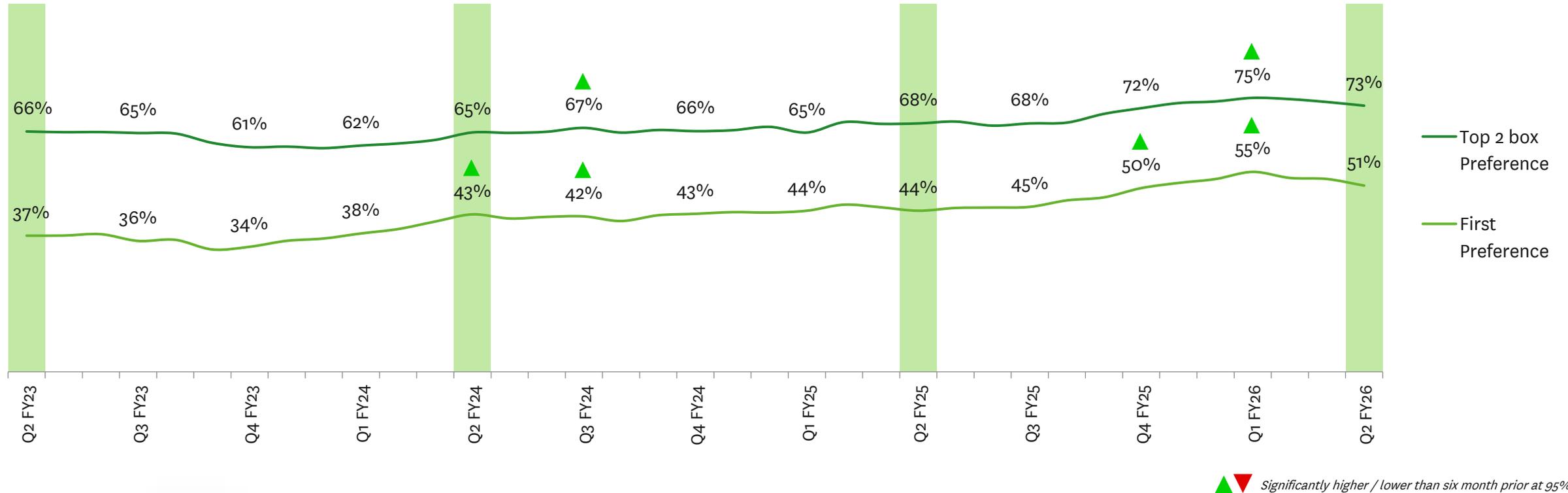
# With 12.2 million ACs, the UK remains an attractive opportunity for TNZ



# Both first choice and top two preference remain at high levels, well above a year ago

## New Zealand Preference KPI

AC Monitor | 6MRA | Total Active Considerers



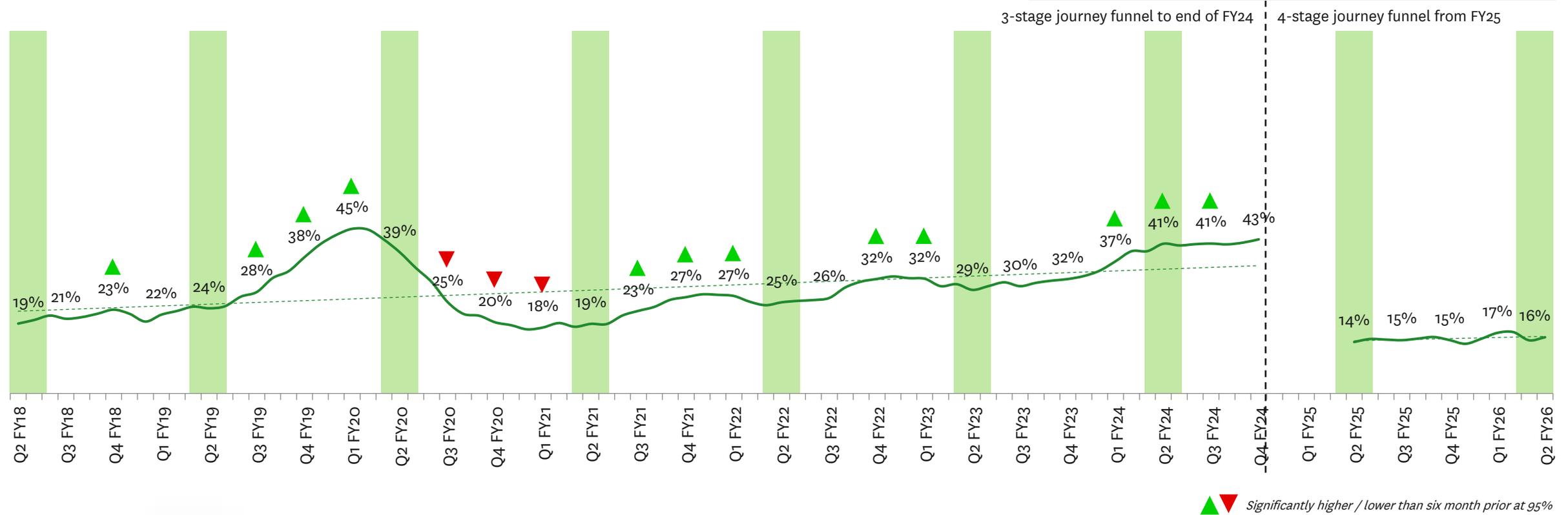
▲ ▼ Significantly higher / lower than six month prior at 95%

# The proportion of ACs in the booking mindset has remained stable over the past 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.



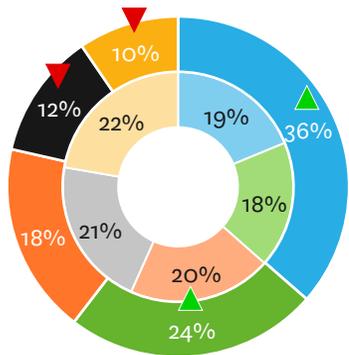
# ACs skew towards younger, London residents and higher household income compared to non-ACs; 51% of the AC pool have pre-school or school-aged children

## Profile of Active Considerers

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

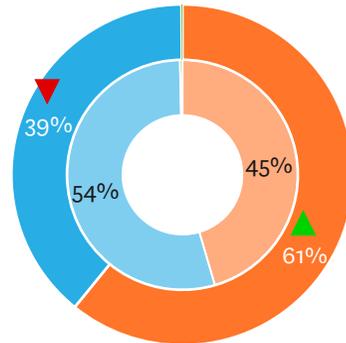
Outer ring: British Active Considerers  
Inner ring: British non-Active Considerers

By age segment



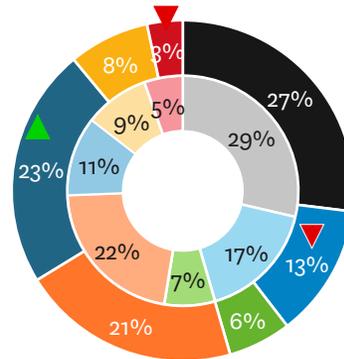
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



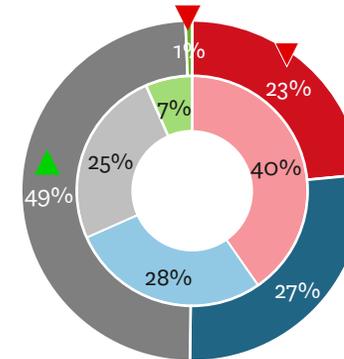
- Male
- Female
- Gender diverse

By region



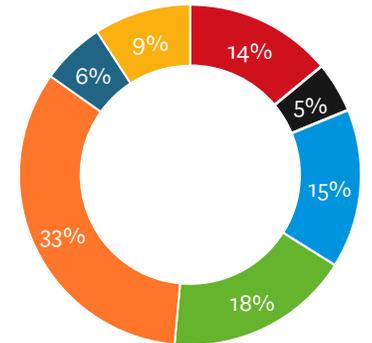
- England - North
- England - Midlands
- England - East
- England - South
- England - London
- Scotland
- Wales

By household income



- Less than £30,000
- £30,000 - £49,999
- £50,000 or more
- Prefer not to say

Household composition



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

2

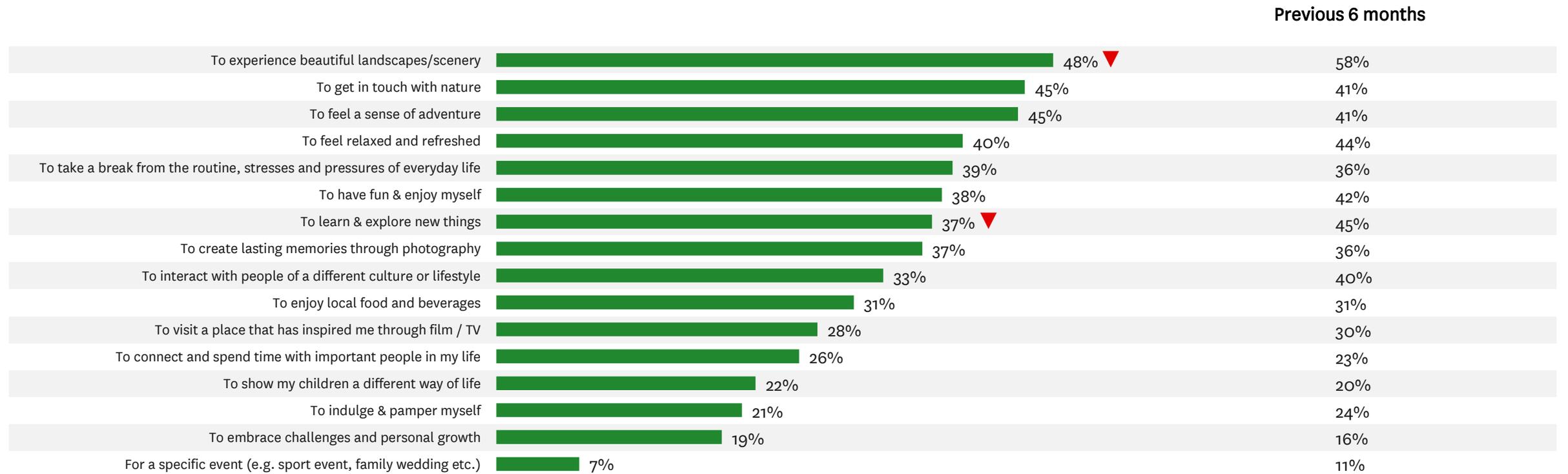
How can TNZ drive desirability of New Zealand as a holiday destination?



# Brand messaging should continue to highlight New Zealand’s stunning landscapes and opportunities to experience nature and adventure; while interest in scenery has softened, it remains the primary motivation for visiting

## Reasons to visit New Zealand for a holiday

AC Monitor | Current 5M | Total Active Considerers

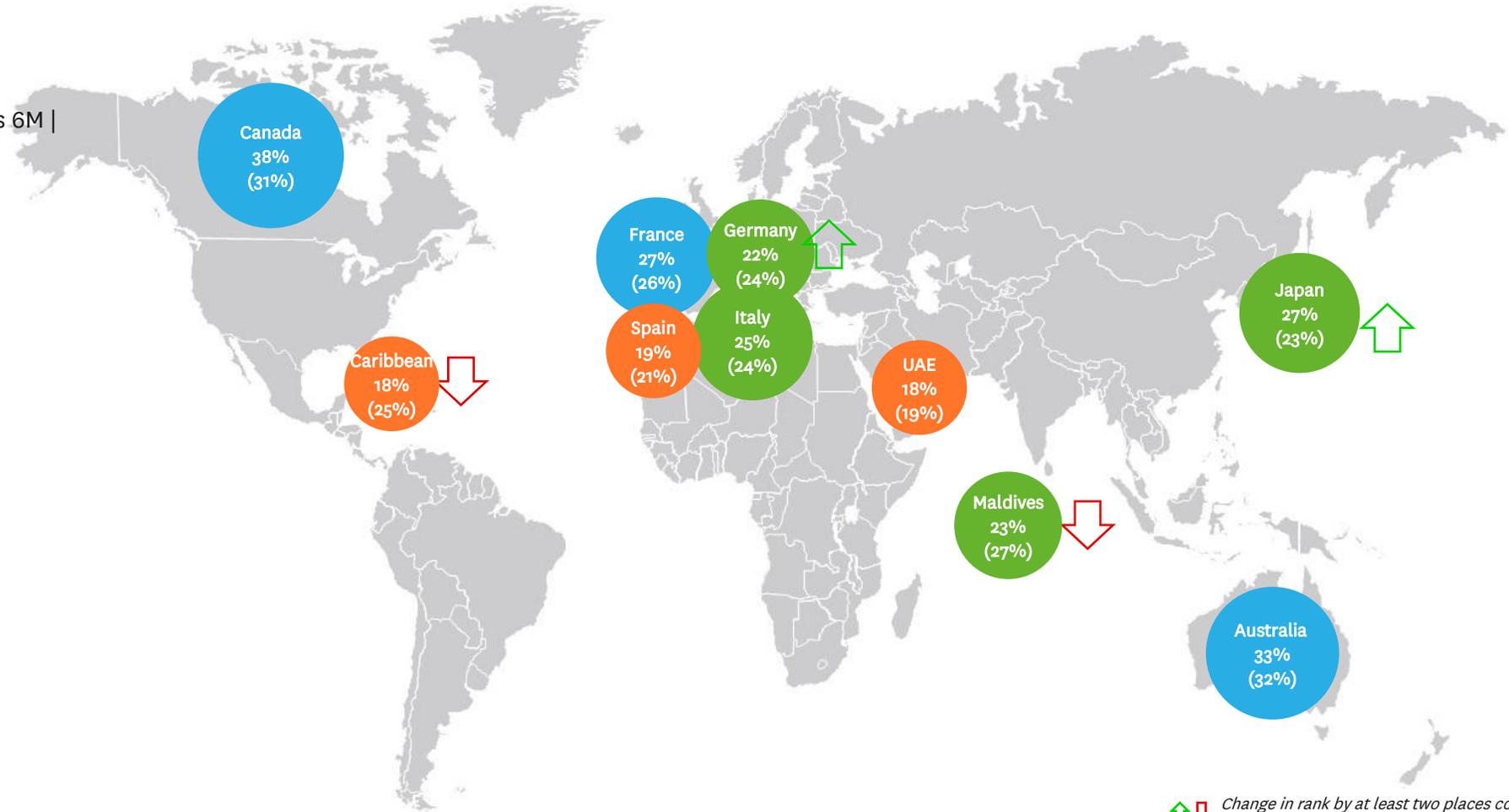


▲ ▼ Significantly higher / lower than previous period at 95%

# Preference for the Maldives and the Caribbean have decreased, while Japan and Germany have moved up in ranking as competitor destinations

## Top ten competitor set for ACs

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



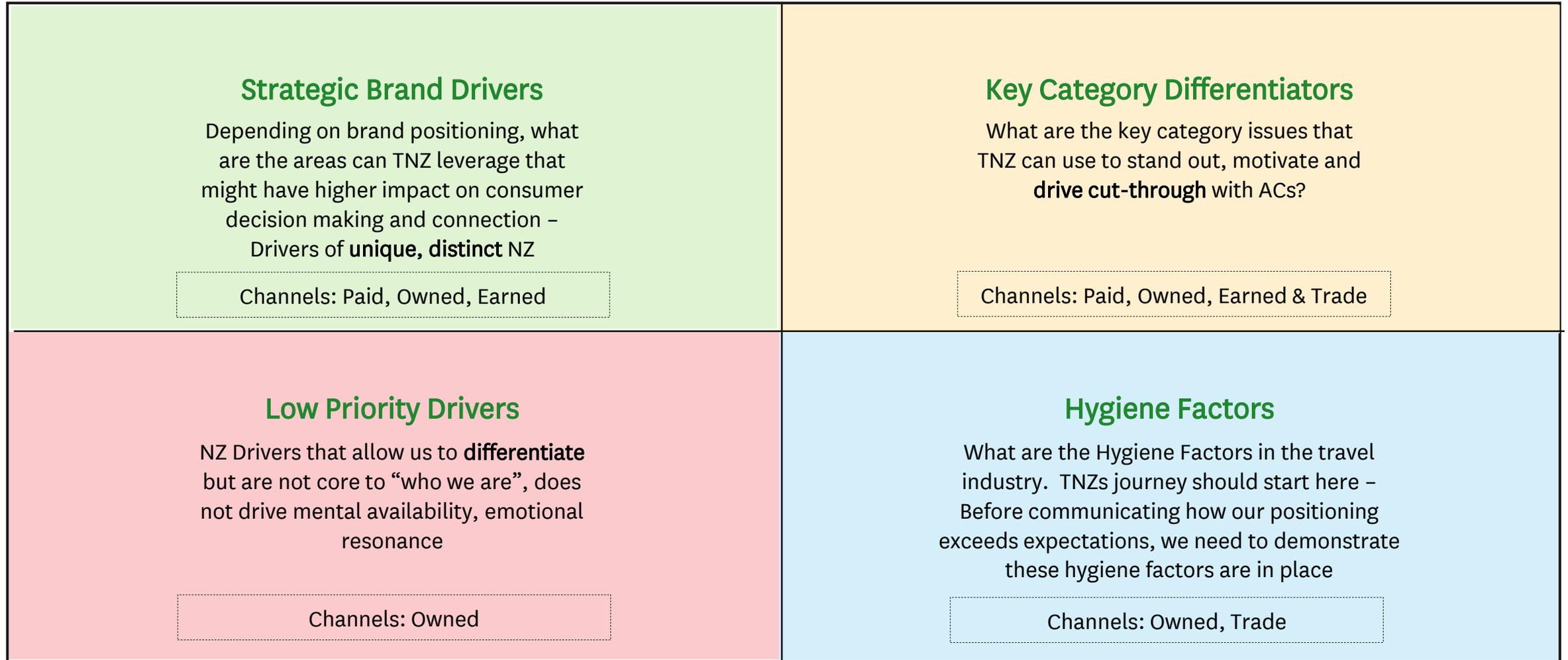
Hawaii has moved out of the top 10 while Germany has moved into the top 10

### Legend

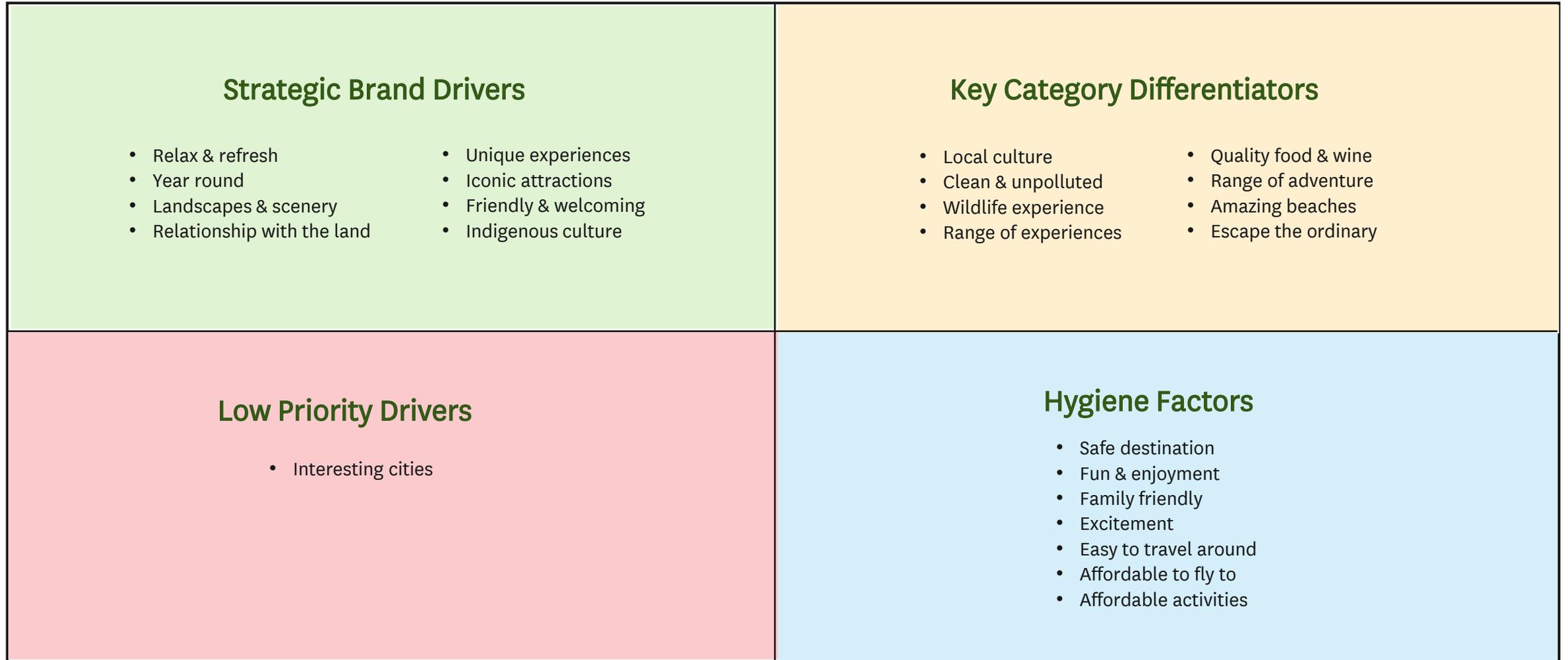
- Top 3
- Rank 4-7
- Rank 8-10

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

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



# Categorising brand associations to the framework...



## 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, emphasising New Zealand as an exciting, welcoming and clean destination with stunning landscapes and unique experiences

## 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	4	1
Landscapes & scenery	2 <span>↑</span>	7 <span>↓</span>	2
Friendly & welcoming	3	2 <span>↑</span>	17
Clean & unpolluted	4 <span>↑</span>	11 <span>↓</span>	5
Unique experiences	5 <span>↑</span>	13	9
Relax & refresh	6 <span>↑</span>	15 <span>↓</span>	8
Wildlife experience	7 <span>↑</span>	14 <span>↓</span>	3
Range of adventure	8	6	7
Safe destination	9 <span>↓</span>	1 <span>↑</span>	11
Quality food & wine	10 <span>↑</span>	17	20
All year-round	11 <span>↑</span>	19	22
Place to escape	12	9 <span>↑</span>	18
Local culture	13	10	10
Interesting cities	14 <span>↑</span>	21	19
Family friendly	15 <span>↑</span>	22 <span>↓</span>	14

Latest results	2025 rank	2024 rank	2023 rank
Relationship with the land	16 <span>↓</span>	3 <span>↑</span>	24
Fun & enjoyment	17	18 <span>↓</span>	4
Range of experiences	18 <span>↓</span>	5 <span>↑</span>	12
Indigenous culture	19 <span>↓</span>	8 <span>↑</span>	16
Iconic attractions	20	20 <span>↓</span>	13
Easy to travel around	21 <span>↓</span>	16 <span>↑</span>	23
Amazing beaches	22 <span>↓</span>	12 <span>↑</span>	21
Affordable activities	23	23	25
Affordable to fly to	24	24	26

Strategic Brand Drivers	Key Category Differentiators
Low Priority Drivers	Hygiene Factors

# New Zealand demonstrates strong alignment with high impact associations – particularly its landscapes & scenery and a destination that is friendly & welcoming and offers excitement; however there is potential to amplify perceptions of relaxation and being a year-round destination

## Brand Associations of New Zealand x Impact on preference

AC Monitor | Current 5M | Total Active Considerers



# New Zealand's strategic and category brand strengths revolve around nature; our stunning landscapes, clean image, indigenous culture, wildlife and relationship with the land, however there is room to boost perceptions of our iconic attractions

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

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

	New Zealand	Canada	Australia	France	Japan	Italy	
Strategic Brand Drivers	Landscapes & scenery	106	112	92	79	95	
	Friendly & welcoming	105	107	93	97	93	
	Unique experiences	101	96	109	94	122	72
	Relax & refresh	99	100	99	105	89	111
	All year-round	98	98	101	108	92	104
	Relationship with the land	113	92	104	106	103	71
	Indigenous culture	108	97	120	87	101	74
	Iconic attractions	89	103	97	96	118	102
Key Category Differentiators	Clean & unpolluted	111	117	96	97	99	70
	Wildlife experience	115	113	134	87	79	51
	Range of adventure	105	106	115	95	99	69
	Quality food & wine	94	82	90	103	100	144
	Place to escape	98	112	103	106	103	75
	Local culture	98	87	95	92	123	108
	Range of experiences	93	96	107	97	108	100
	Amazing beaches	105	79	131	86	72	124

### Actions for TNZ:

#### Strengths:

- Relationship with the land
- Indigenous culture
- Landscapes & scenery
- Wildlife experience
- Clean & unpolluted

#### Drivers to dial up:

- Iconic attractions
- Quality food & wine
- Range of experiences

# Compared to its key competitors, New Zealand's cities are perceived as less alluring – particularly in relation to Italy, France and Japan

## 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	Canada	Australia	France	Japan	Italy
Hygiene Factors	Excitement	101	105	91	90	88
	Safe destination	98	108	89	95	105
	Family friendly	103	102	85	119	112
	Fun & enjoyment	96	109	103	94	105
	Easy to travel around	94	98	90	116	125
	Affordable activities	103	96	84	109	122
	Affordable to fly to	90	80	86	132	162
Low Priority	Interesting cities	85	99	91	115	104

**Actions for TNZ:**

**Drivers to dial up:**

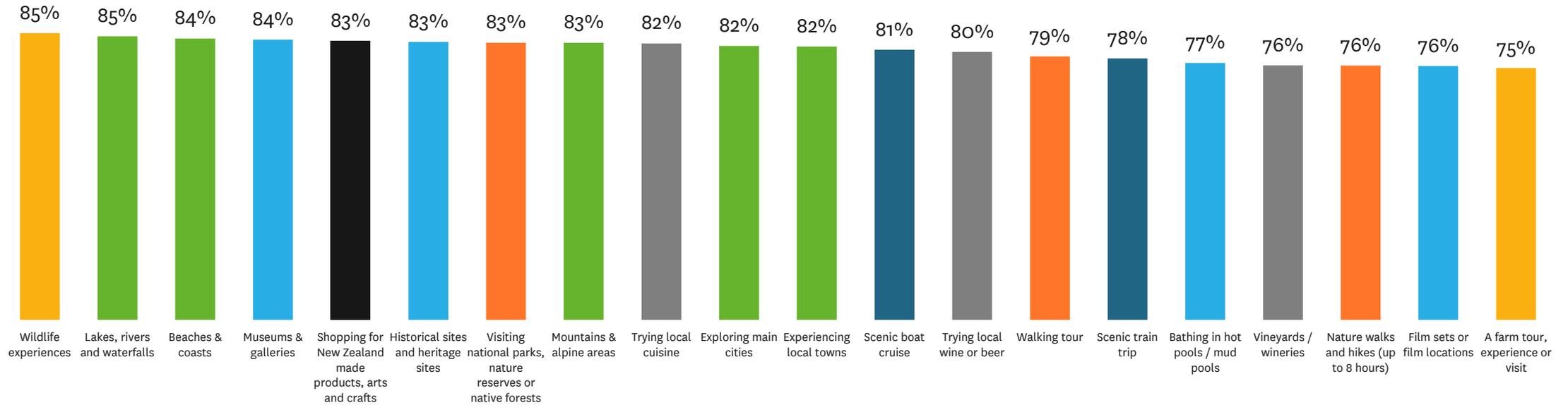
— Interesting cities

# Wildlife experiences is the most sought after activity for British ACs, however promoting activities revolving around scenic attractions could help lift New Zealand's under-indexing in iconic attractions

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

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

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



Previous 6 months	84%	85%	87%	83%	85%	85%	87%	78%	87%	85%	86%	84%	78%	79%	83%	78%	77%	77%	77%	74%
-------------------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

3

How can TNZ maximise impact along consumer path to purchase?



# Ease of travel around New Zealand is the largest knowledge gap for ACs, and while concerns around flight duration have significantly dropped from the previous 6 months, it remains a key knowledge gap

## 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	42%	38%
2	The length of time required to fly to New Zealand	36% ▼	43%
3	What the weather is like	34%	33%
4	What the best time of year is to do the activities I want to	33%	35%
5	How welcoming the locals are	31%	34%
6	The quality and variety of food and beverage options	29%	31%
7	How safe it is to participate in adventure activities	28%	31%
8	How safe it is from crime	28%	29%
9	How long it takes to travel between the main attractions	28%	33%
10	Where I should get information about organising a holiday	27%	24%

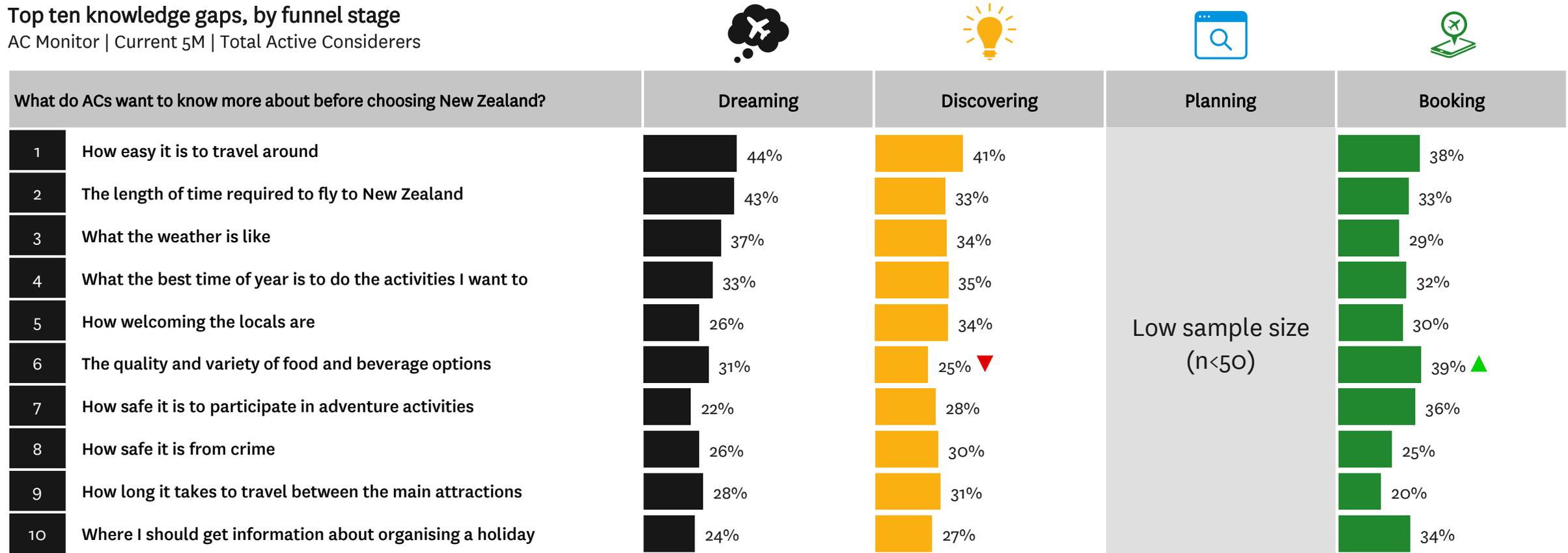
Ranks higher now than six months ago

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

# Knowledge gaps are relatively similar across Dreamers, Discoverers and those in the Booking mindset; however, to convert Bookers, messaging around the quality and variety of food and beverage options should be dialled up

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

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



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

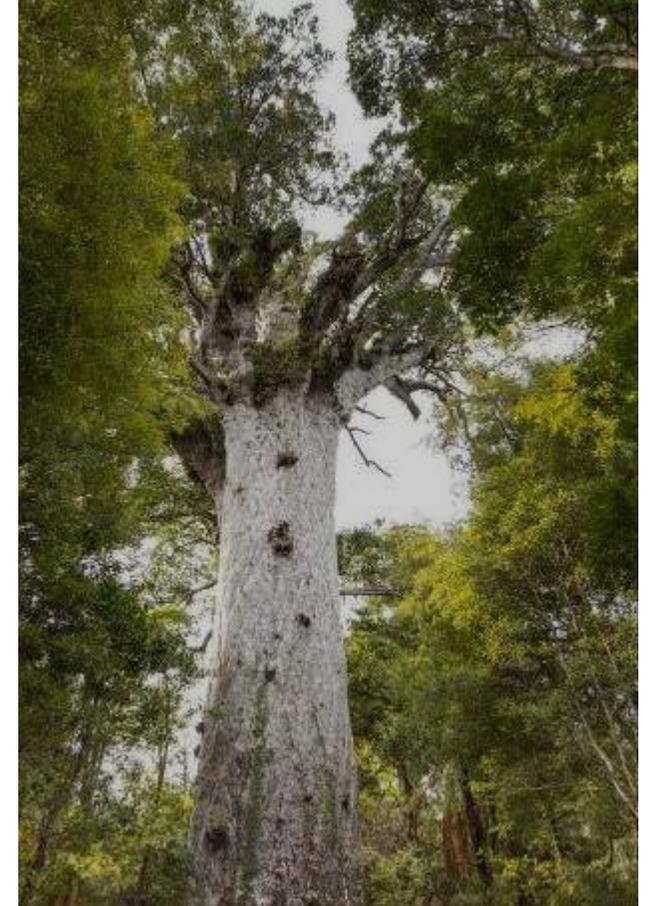
# The key barrier for ACs who haven't booked yet is deciding the best time of year to travel; providing clearer information on best experiences available across the year may help hesitant ACs

## Barriers to booking holiday to New Zealand

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

		Previous 6 months
I'm still deciding on what time of year I want to travel	 38%	38%
Waiting for a good package deal on flights and accommodation	 24%	15%
I have more research to do about New Zealand as a holiday destination	 18%	34%
Waiting to accrue enough annual leave	 17%	24%
Don't have time to plan the trip at the moment	 15%	13%
Waiting for the right life circumstances to travel	 14%	15%
Waiting for a deal on flights	 10%	14%
It's too expensive to travel to New Zealand	 6%	4%
Don't have enough time to experience it properly	 4%	8%
I can't afford it at the moment	 3%	6%
New Zealand is too far away / the flight is too long	 2%	0%
Visa process is confusing / difficult	0%	6%

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

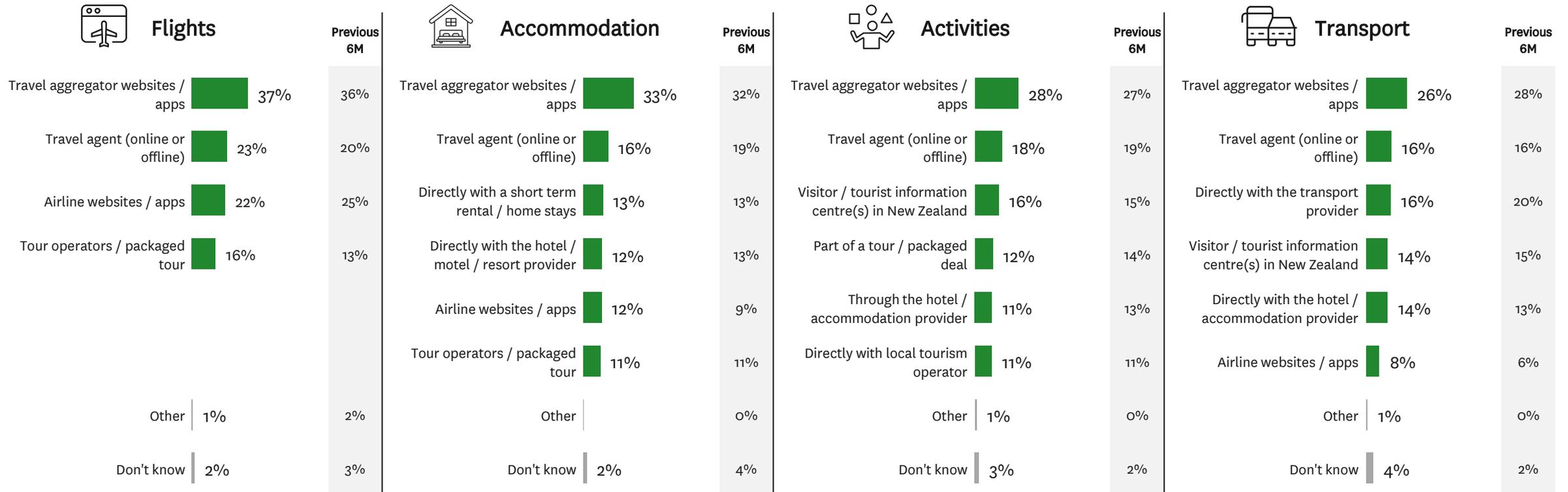


# Travel aggregators are the most popular channel for booking various aspects of their trip and thus provide an opportunity to influence ACs

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

AC Monitor | Current 5M | Total Active Considerers

**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.



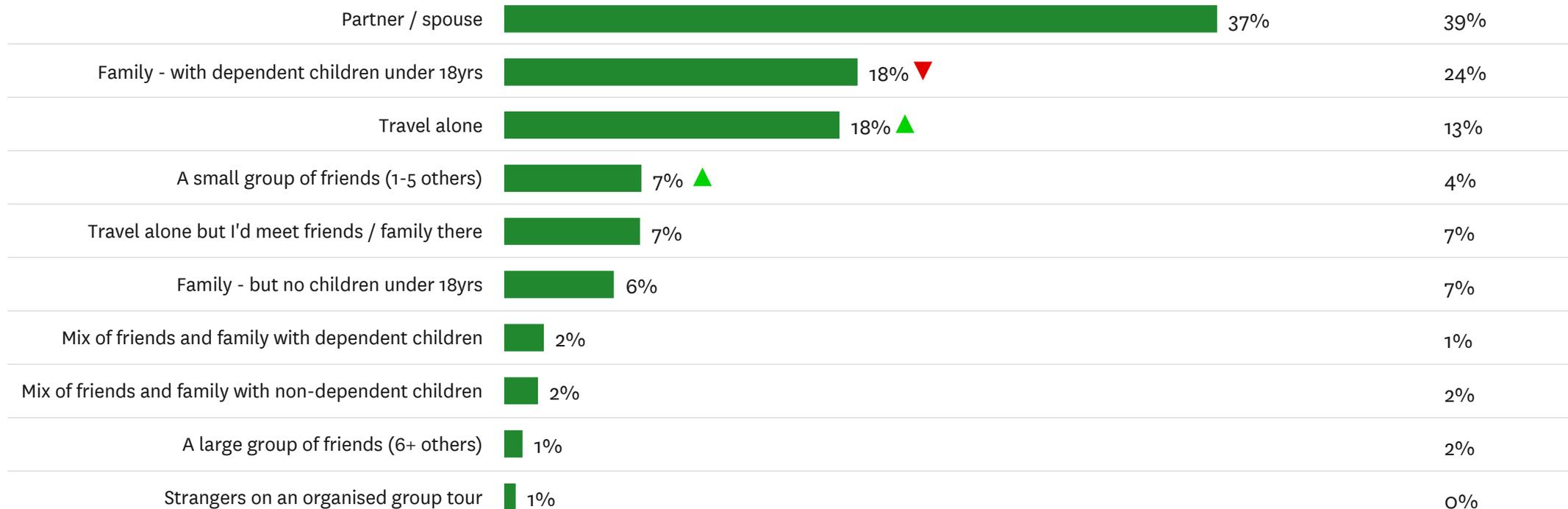
▲ ▼ Significantly higher / lower than previous period at 95%

# British ACs are most likely to travel to New Zealand with their partner / spouse, however there is a significant uplift in those looking to travel alone or with a small group of friends

## Likely travel party for a New Zealand holiday

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

Previous 6 months



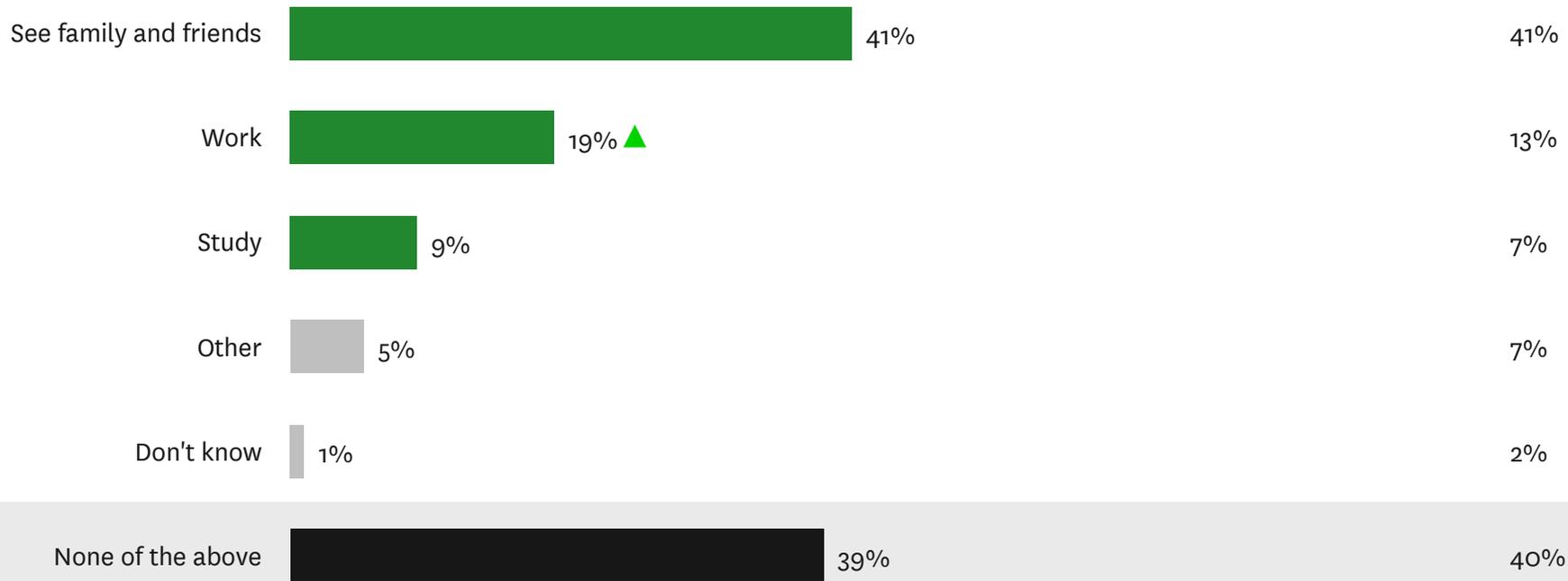
▲ ▼ Significantly higher / lower than previous period at 95%

# The AC pool is largely split between those who intend to visit New Zealand for a holiday only, and those who intend to visit family or friends, however a greater proportion would also travel for work compared to six months ago

## Additional intentions when on holiday in New Zealand

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

Previous 6 months



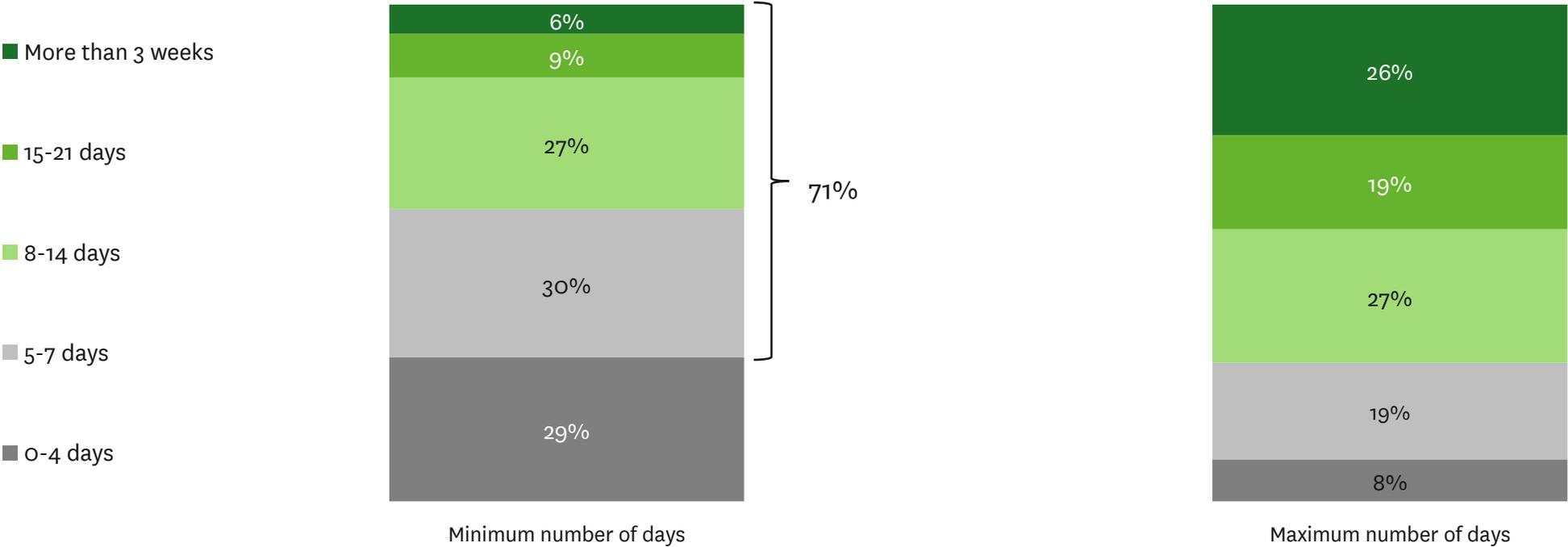
*This represents ACs who are considering travelling to New Zealand for a holiday ONLY*

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

# The majority of ACs would spend more than 5 days in New Zealand, while 26% would spend more than 3 weeks

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

AC Monitor | Current 5M | Total Active Considerers



4

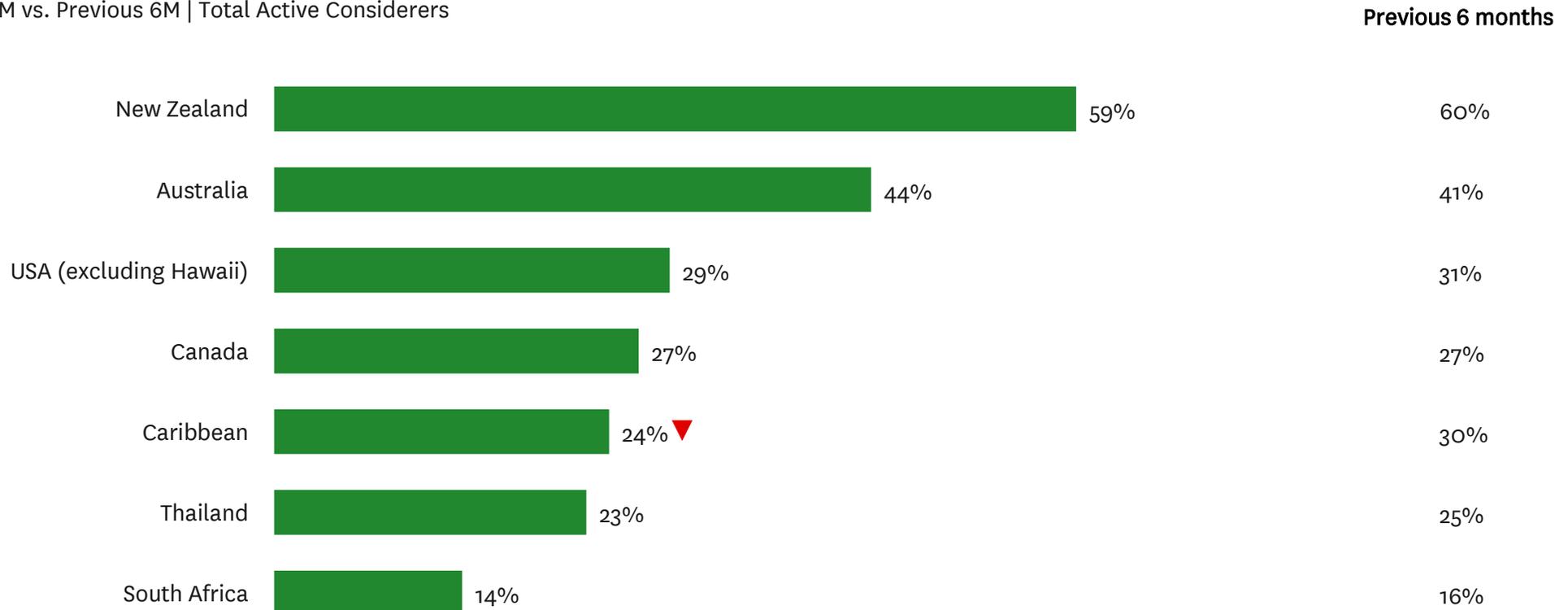
Is TNZ's advertising reaching the desired audience?



# Advertising recall is stable against the previous six months, with an indicative increase in recall of Australia's activity

## Holiday destinations seen advertised or promoted recently (Prompted Awareness)

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

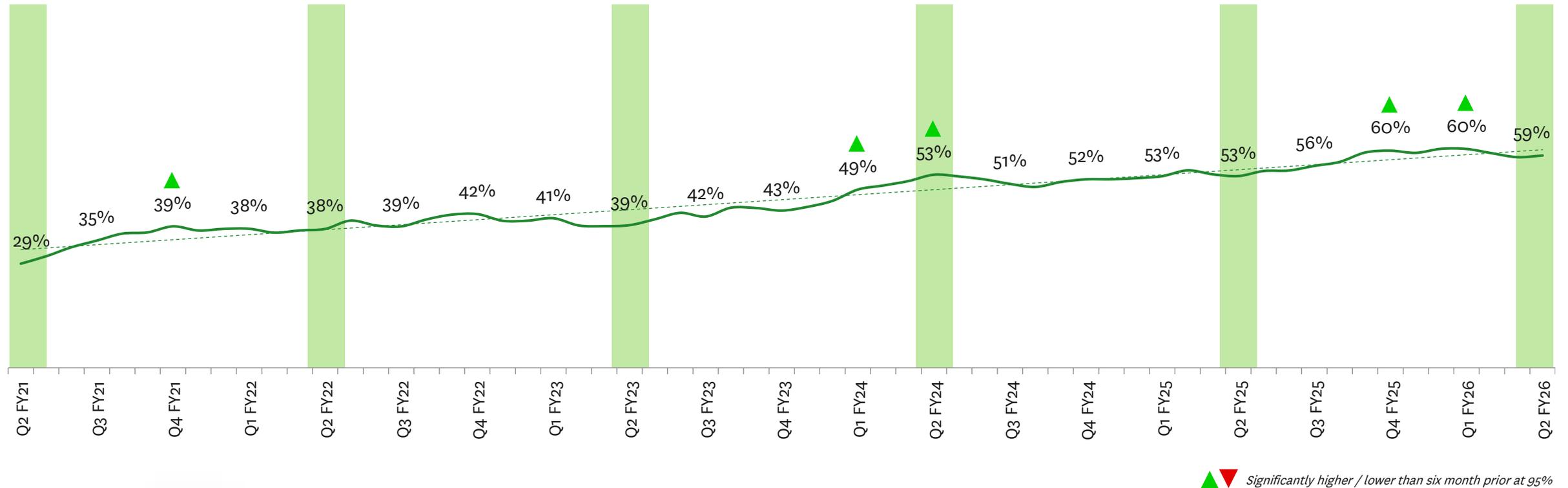


▲ ▼ Significantly higher / lower than previous period at 95%

# New Zealand destination advertising awareness has steadily improved over the past two years

## Seen New Zealand advertised or promoted recently (Prompted Awareness)

AC Monitor | 6MRA | Total Active Considerers

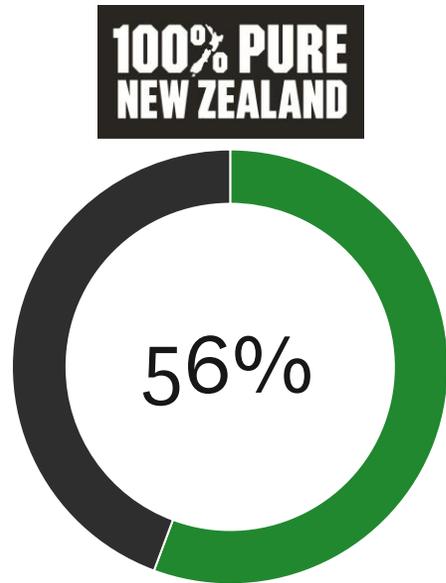


▲ ▼ Significantly higher / lower than six month prior at 95%

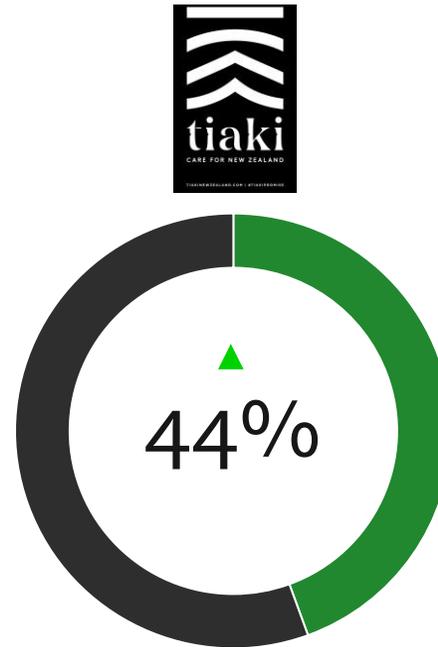
# Awareness of 100% Pure and newzealand.com have incrementally improved from the previous six months

## Asset awareness

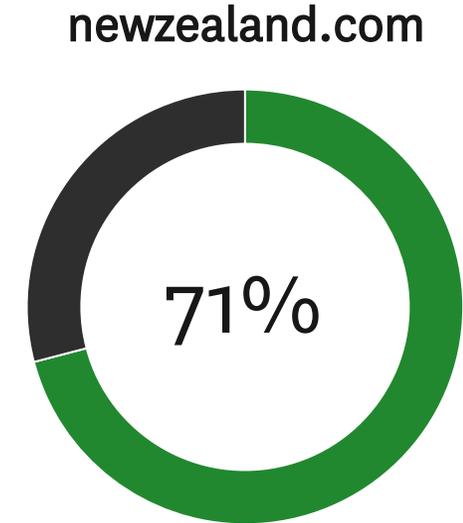
AC Monitor | Current 5M vs. Previous 6M | Total Active Considerers



■ Aware ■ Not aware



■ Aware ■ Not aware



■ Aware ■ Not aware

Previous 6M

52%

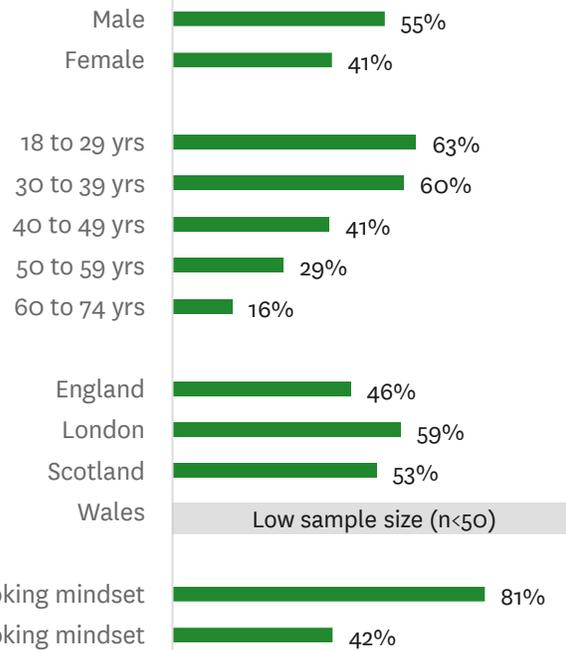
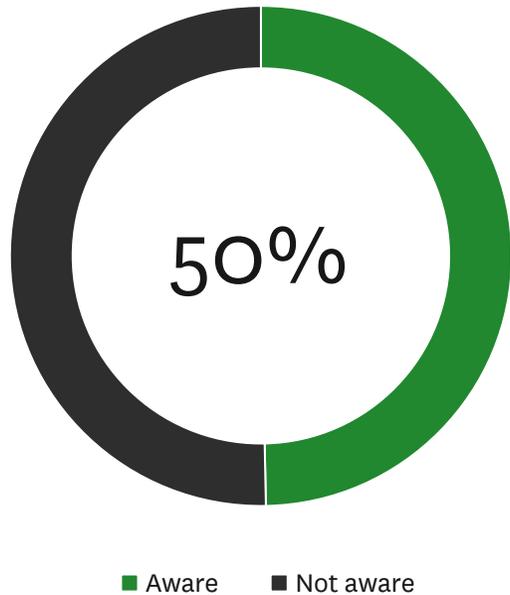
33%

66%

# Awareness of the Arika campaign skews more towards males, those aged 18 to 39 years, and additionally ACs in the booking mindset

## Arika Campaign awareness

AC Monitor | Current 5M | Total Active Considerers





GERMANY

KANTAR

5

What is the size of  
opportunity in  
Germany?



# Active Considerer Funnel – Germany

## Active Considerers definition

Active Considerers find New Zealand highly appealing as a holiday destination, would seriously consider visiting in the next three years, see New Zealand as a preferred destination for their next holiday, and have a realistic budget for their visit (at least €2,000 per person) to New Zealand.

Online population, 18-74 years of age<sup>(1)</sup>

57.9m

61%

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

35.2m

51%

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

18.0m

90%

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

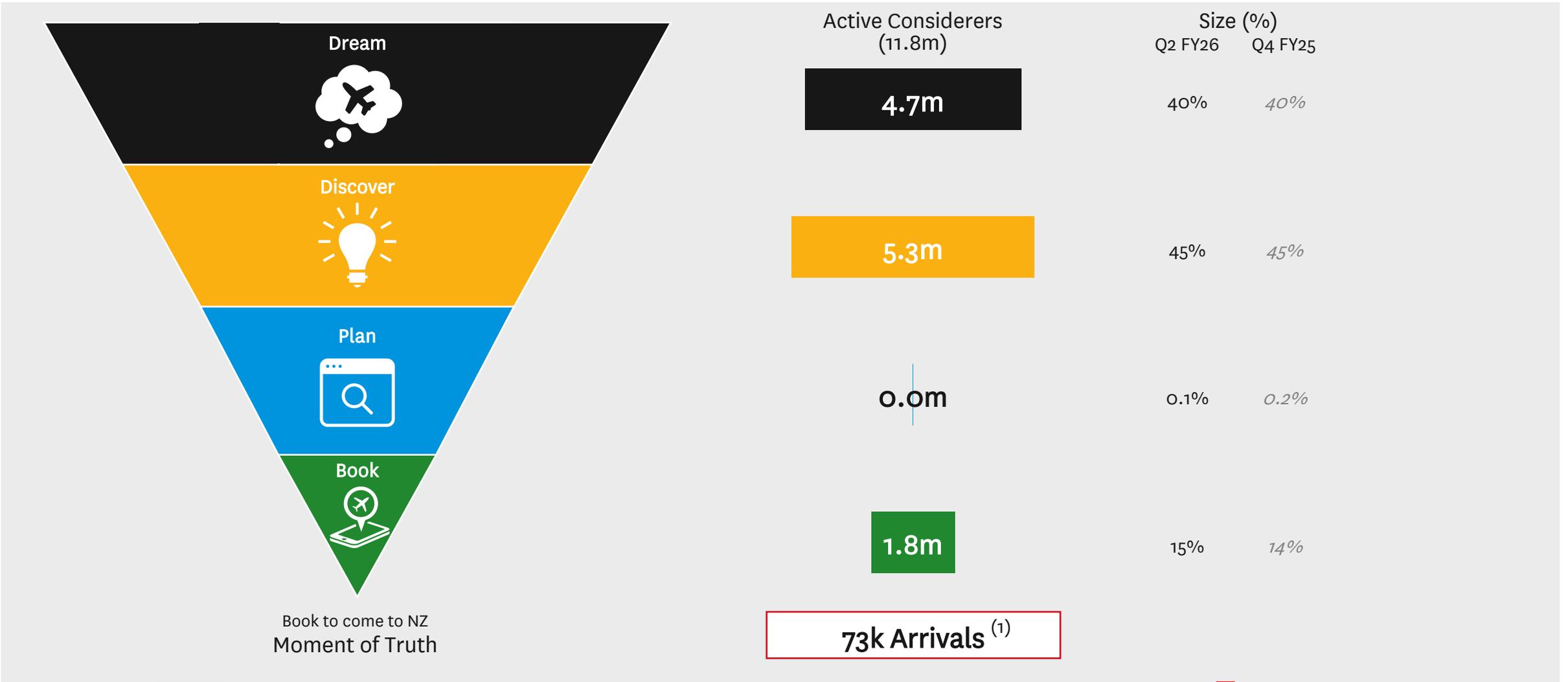
16.2m

73%

Willing to spend at least €2,000 per person on a holiday to New Zealand<sup>(2)</sup>

11.8m

# Journey funnel to New Zealand – Germany



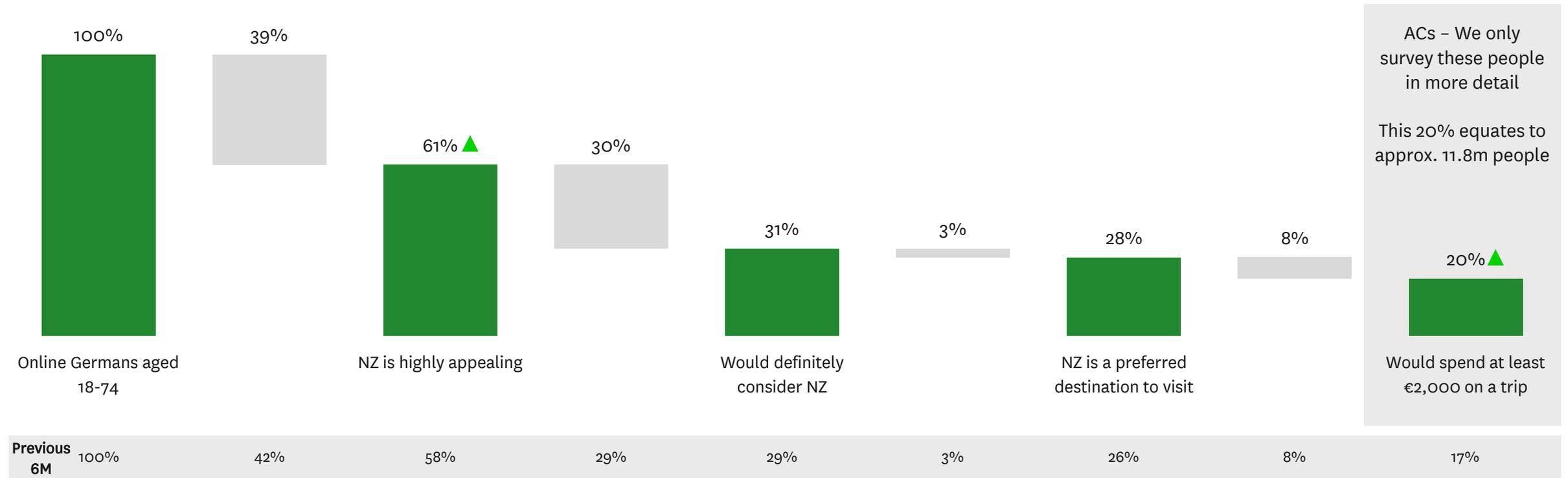
▲ ▼ Significantly higher / lower than previous period

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

# The AC incidence in Germany has achieved a sizeable jump to 20% compared to six months ago, equating to approximately 11.8 million potential visitors

## Qualifying criteria for defining ACs

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



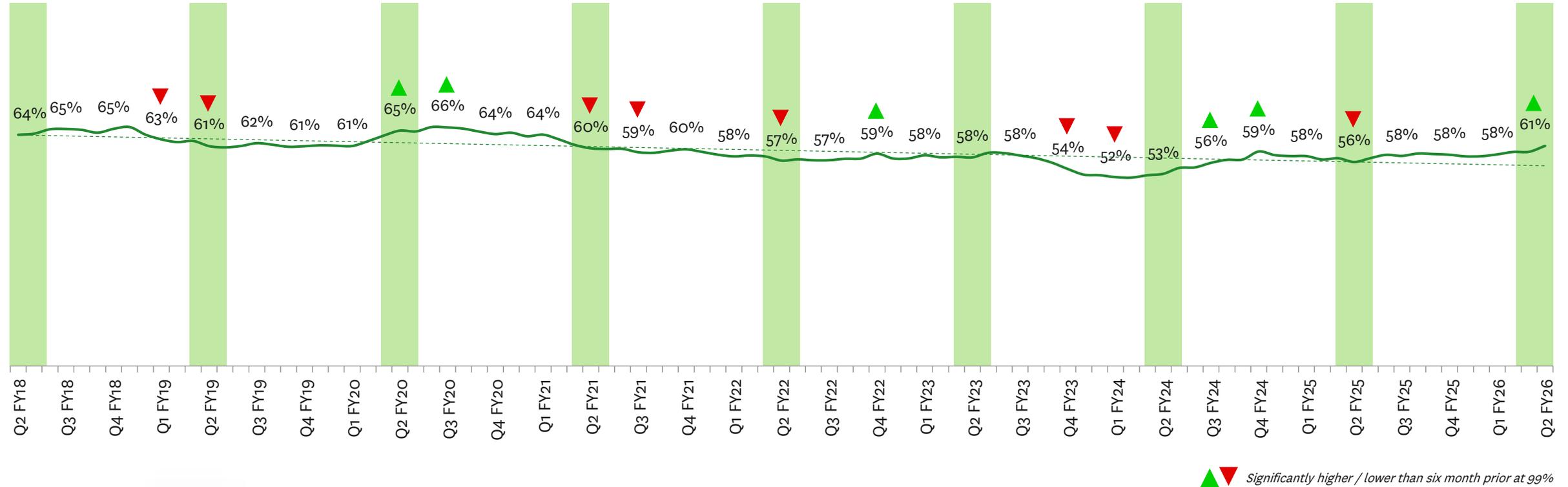
▲ ▼ Significantly higher / lower than six month prior at 99%

# The uplift in AC incidence can be attributed to growth in appeal over the past year

## Appeal

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

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



# The AC incidence in Germany has been growing over the last two years, reaching a peak level of 20% in this current period

## Incidence of ACs

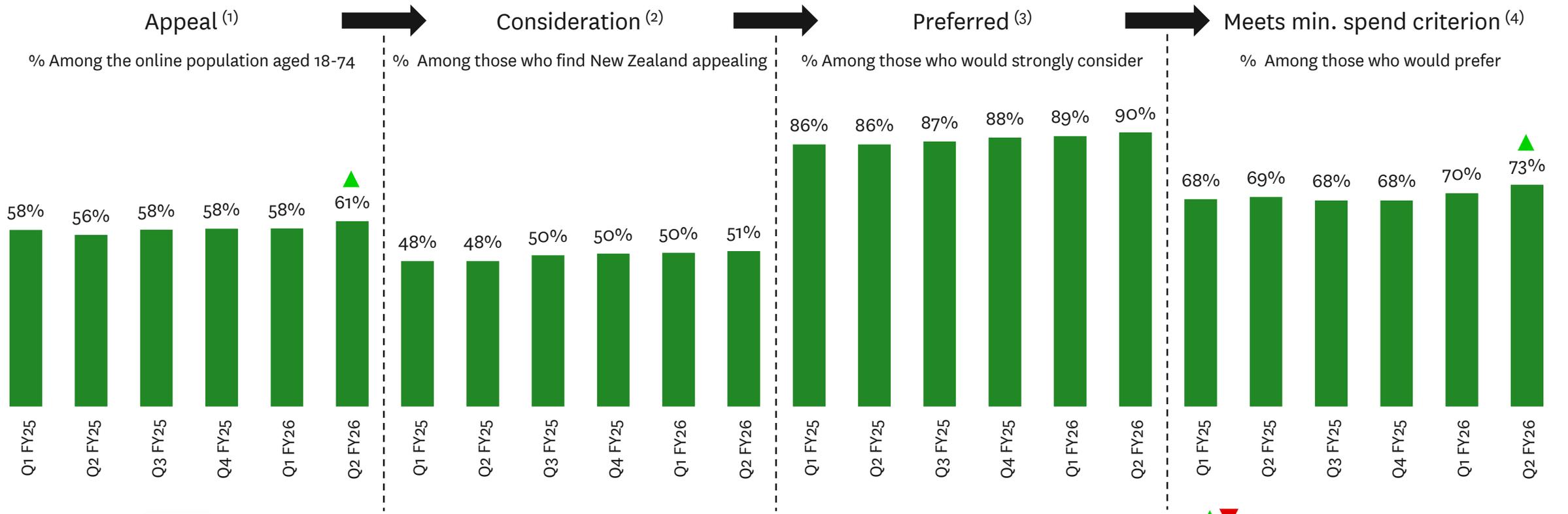
AC Monitor | 6MRA | Target online population aged 18-74



# Conversion from appeal to consideration remains the weakest spot in the funnel, however the past year has seen incremental uplifts across all stages of the AC funnel

## Conversion of ACs through the Consideration Funnel

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

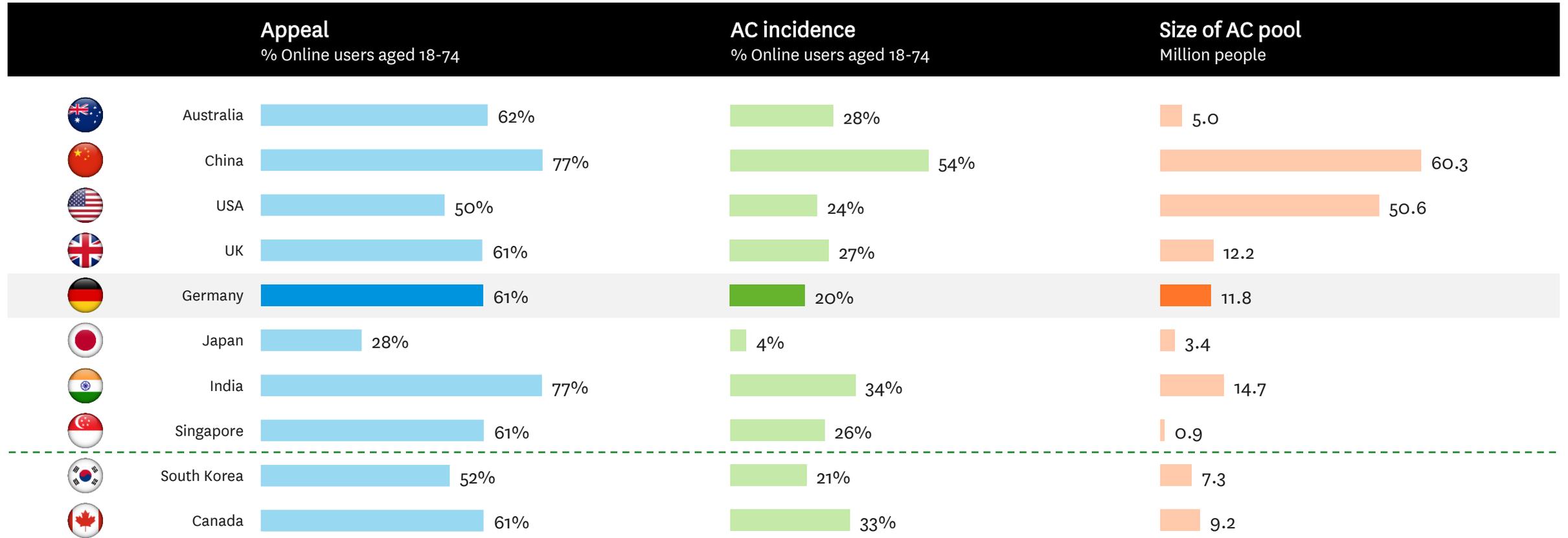


▲ ▼ Significantly higher / lower than six month prior at 99%

Sample size: Q1 FY25 - Q2 FY26 (6MRA): Appeal minimum n = 4546, maximum n = 7070 | Consider minimum n = 2682, maximum n = 4020 | Prefer minimum n = 1227, maximum n = 1714 | Spend minimum n = 1094, maximum n = 1440

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?"

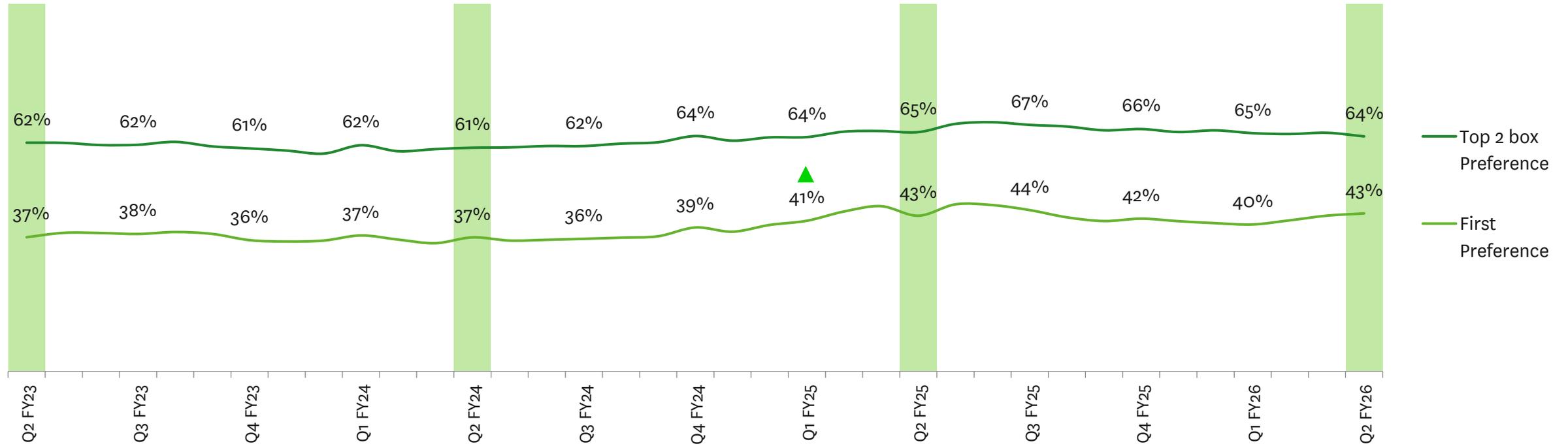
# With 11.8 million ACs, Germany presents a healthy opportunity to drive arrivals



# Among ACs, both first-choice and top two preference for New Zealand has remained stable over the past year

## New Zealand Preference KPI

AC Monitor | 6MRA | Total Active Considerers



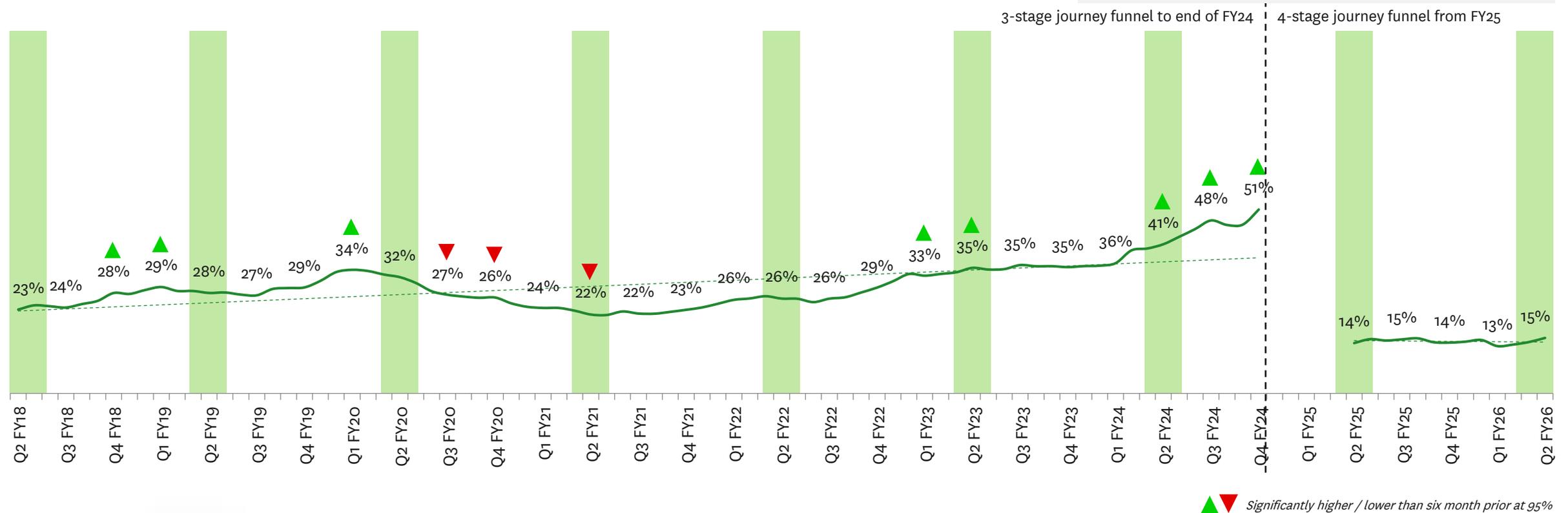
  Significantly higher / lower than six month prior at 95%

# The proportion of ACs in the booking mindset has remained stable over the past 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.



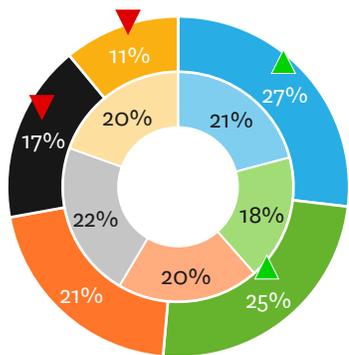
# Compared to non-ACs, ACs are more likely to be aged 18-39 years old, male, and reside in either North or South Germany; 40% of the AC pool have pre-school or school-aged children

## Profile of Active Considerers

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

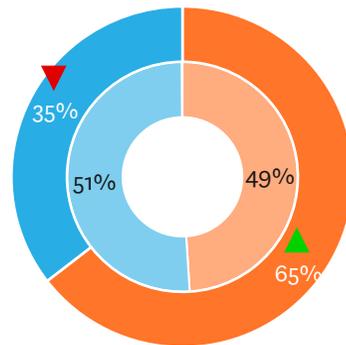
Outer ring: German Active Considerers  
Inner ring: German non-Active Considerers

By age segment



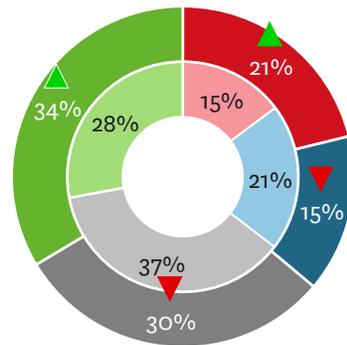
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



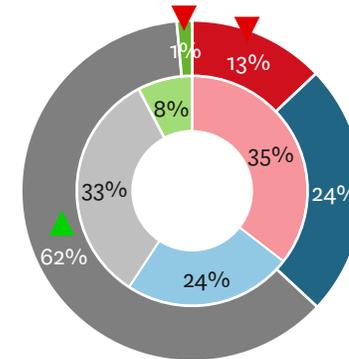
- Male
- Female
- Gender diverse

By region



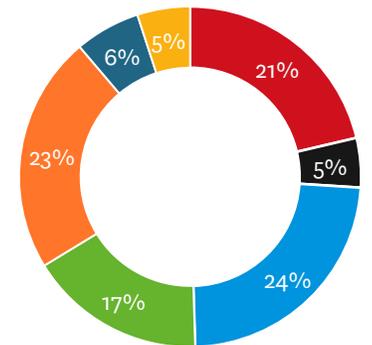
- North
- East
- Central
- South

By household income



- Less than €30,000
- €30,000 - €47,999
- €48,000 or more
- Prefer not to say

Household composition



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

6

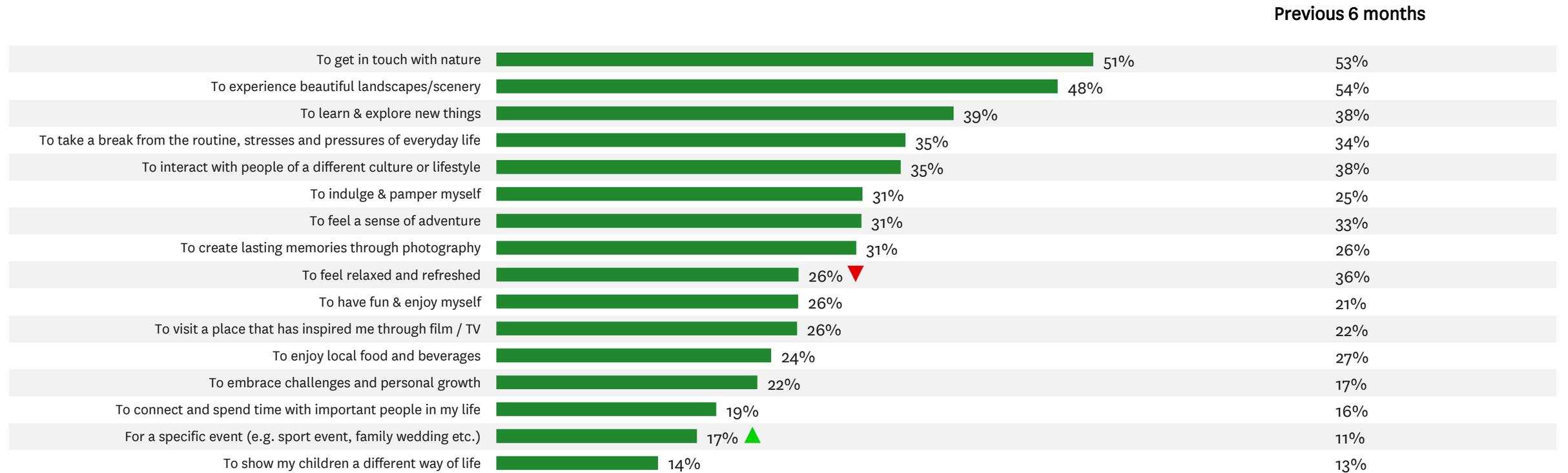
How can TNZ drive desirability of New Zealand as a holiday destination?



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

## Reasons to visit New Zealand for a holiday

AC Monitor | Current 5M | Total Active Considerers

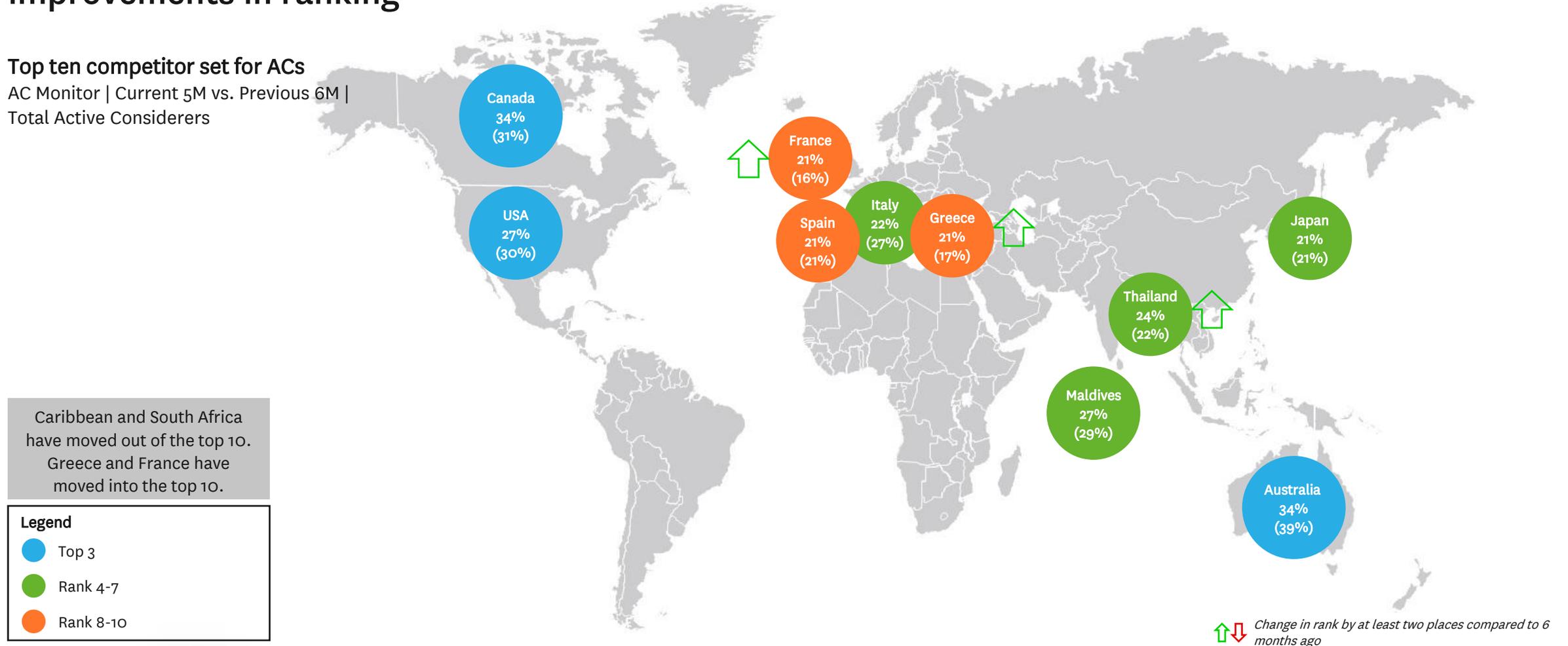


▲ ▼ Significantly higher / lower than previous period at 95%

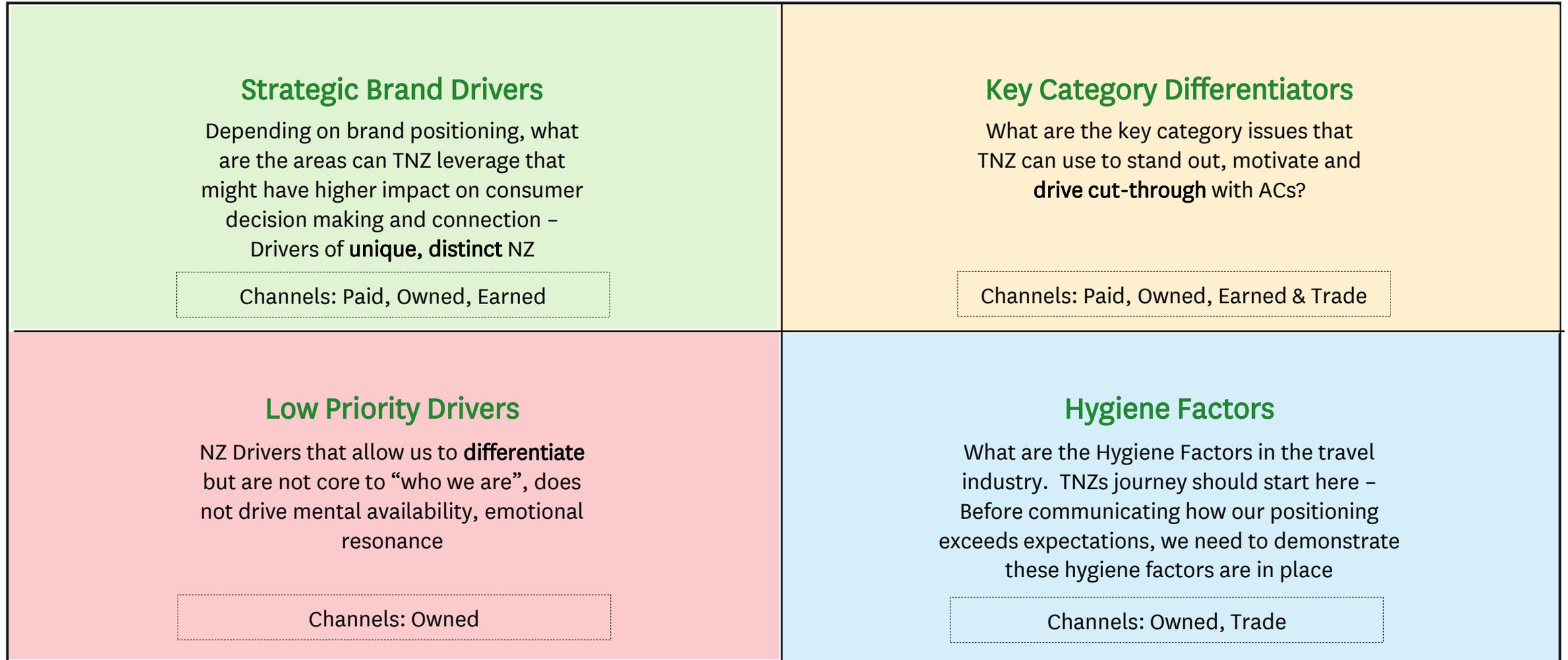
# Canada, Australia and USA remain the preferred top 3 destinations for Germany, although Canada and Australia have changed places; Thailand, Greece and France have experienced the greatest improvements in ranking

## Top ten competitor set for ACs

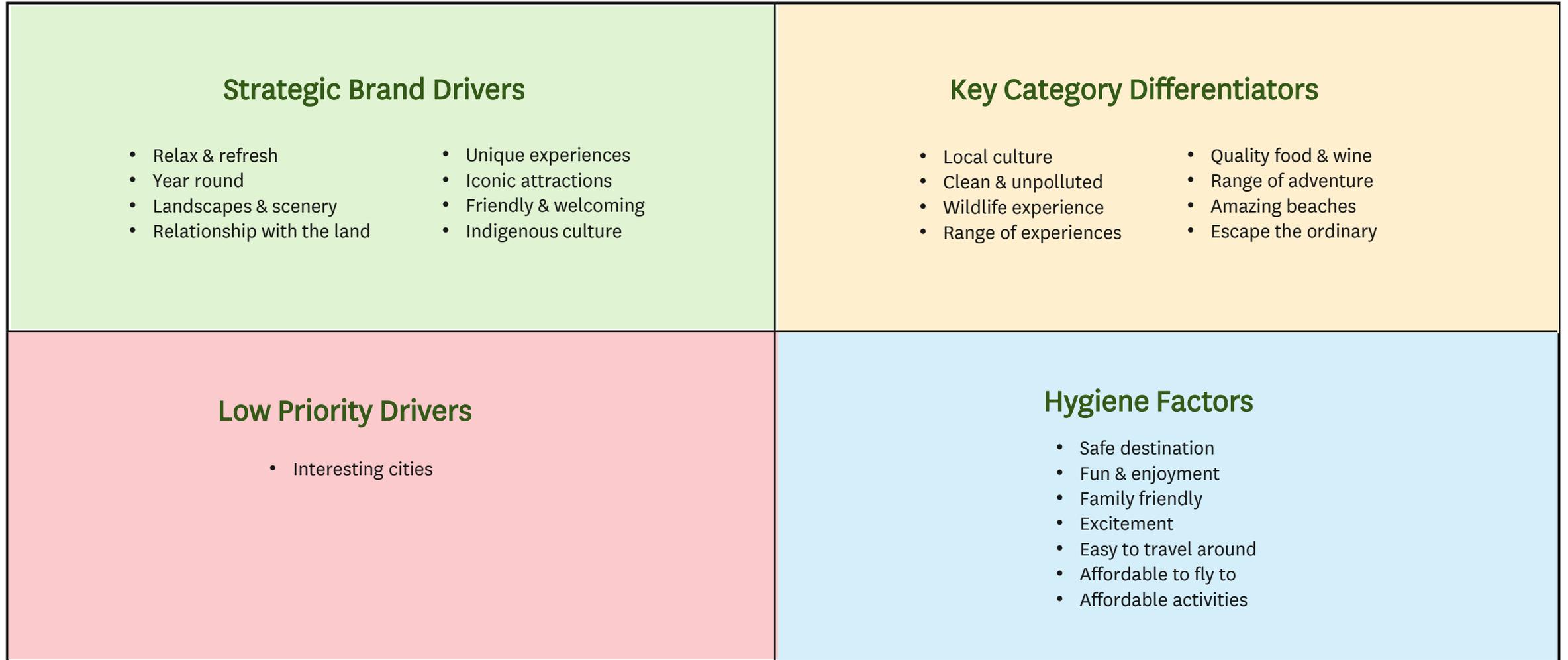
AC Monitor | Current 5M vs. Previous 6M |  
Total Active Considerers



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



# Categorising brand associations to the framework...



## 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

# Safety and New Zealand's clean image have emerged as stronger drivers of preference in 2025; excitement, local culture and our stunning scenery remain as key drivers also

## 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	3	6
Safe destination	2	7	1
Clean & unpolluted	3	10	11
Landscapes & scenery	4	1	2
Local culture	5	8	12
Relationship with the land	6	11	8
Range of adventure	7	5	7
Place to escape	8	6	5
Range of experiences	9	4	9
All year-round	10	13	15
Interesting cities	11	16	22
Wildlife experience	12	17	14
Friendly & welcoming	13	12	10
Amazing beaches	14	14	19
Iconic attractions	15	19	21

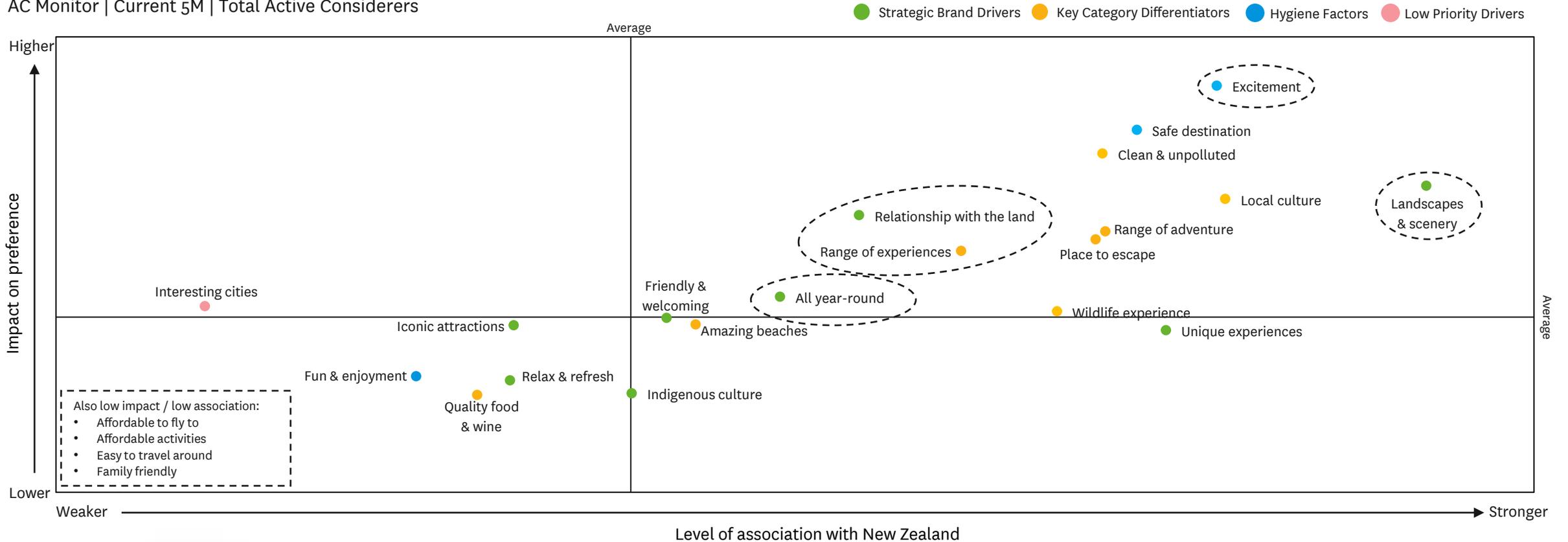
Latest results	2025 rank	2024 rank	2023 rank
Unique experiences	16	2	3
Fun & enjoyment	17	18	17
Relax & refresh	18	15	16
Indigenous culture	19	9	18
Quality food & wine	20	20	20
Easy to travel around	21	22	25
Family friendly	22	21	23
Affordable activities	23	23	24
Affordable to fly to	24	24	26

Strategic Brand Drivers	Key Category Differentiators
Low Priority Drivers	Hygiene Factors

# New Zealand as a destination performs more strongly on the higher impact drivers, most notably excitement and landscapes & scenery, but more could be done to build perceptions of ‘relationship with the land’, ‘range of experiences’, and ‘all year-round’

## Brand Associations of New Zealand x Impact on preference

AC Monitor | Current 5M | Total Active Considerers



# New Zealand's top competitive strengths are its cleanliness, local and indigenous culture, and wildlife experiences but more could be done to boost its competitive edge in other areas, particularly as a friendly & welcoming destination, range of experiences and amazing beaches

## 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	Canada	Australia	USA	Maldives	Thailand	
Strategic Brand Drivers	Landscapes & scenery	104	122	94	110	73	97
	Relationship with the land	103	99	104	102	92	98
	All year-round	101	87	103	103	109	96
	Friendly & welcoming	92	106	103	86	100	116
	Iconic attractions	101	90	104	127	73	103
	Unique experiences	99	93	112	91	110	94
	Relax & refresh	100	101	88	75	129	108
	Indigenous culture	108	98	112	94	92	90
Key Category Differentiators	Clean & unpolluted	130	103	111	60	112	70
	Local culture	108	98	100	93	88	111
	Range of adventure	96	113	108	102	84	97
	Place to escape	100	103	97	85	114	101
	Range of experiences	93	102	101	115	95	96
	Wildlife experience	107	128	113	93	73	81
	Amazing beaches	91	64	103	107	125	113
	Quality food & wine	102	85	106	99	105	102

### Actions for TNZ:

#### Strengths:

- Clean & unpolluted
- Local culture
- Wildlife experience
- Indigenous culture

#### Drivers to dial up:

- Friendly & welcoming
- Amazing beaches
- Range of experiences

# Relative to competitors, New Zealand performs below average across most hygiene factors, and there is room to improve perceptions of our interesting cities also

## 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	Canada	Australia	USA	Maldives	Thailand
Hygiene Factors	Excitement	98	96	100	103	107
	Safe destination	102	116	97	91	118
	Fun & enjoyment	90	90	97	107	104
	Easy to travel around	102	94	80	107	120
	Family friendly	97	103	88	109	101
	Affordable activities	96	96	91	101	103
	Affordable to fly to	99	89	82	110	106
Low Priority	Interesting cities	87	115	92	130	77

### Actions for TNZ:

#### Drivers to dial up:

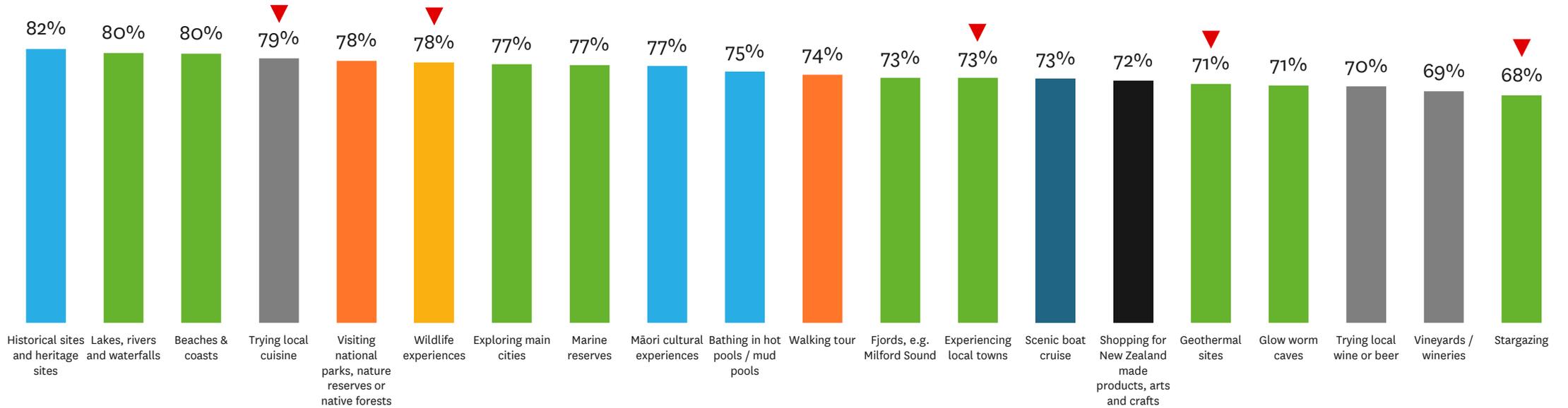
- Fun & enjoyment
- Interesting cities

# The most common activities of interest are related to historical sites, scenic attractions and local cuisine

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

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

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



Previous 6 months	80%	82%	85%	87%	83%	85%	79%	78%	78%	77%	78%	78%	80%	78%	75%	79%	72%	77%	71%	75%
-------------------	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

7

How can TNZ maximise impact along consumer path to purchase?



# Reassuring ACs on how welcoming the locals are, in addition to providing guidance on the ideal times of the year for various activities should be priorities as key knowledge gaps to address

## 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	The length of time required to fly to New Zealand	32%	37%
2	How welcoming the locals are	30%	27%
3	What the best time of year is to do the activities I want to	25%	26%
4	How safe it is to participate in adventure activities	24%	26%
5	What the weather is like	24%	27%
6	How long it takes to travel between the main attractions	23%	23%
7	Where I should get information about organising a holiday	23%	24%
8	How easy it is to travel around	22%	24%
9	The quality and variety of food and beverage options	21%	21%
10	The length of time needed to experience New Zealand properly	19%	23%

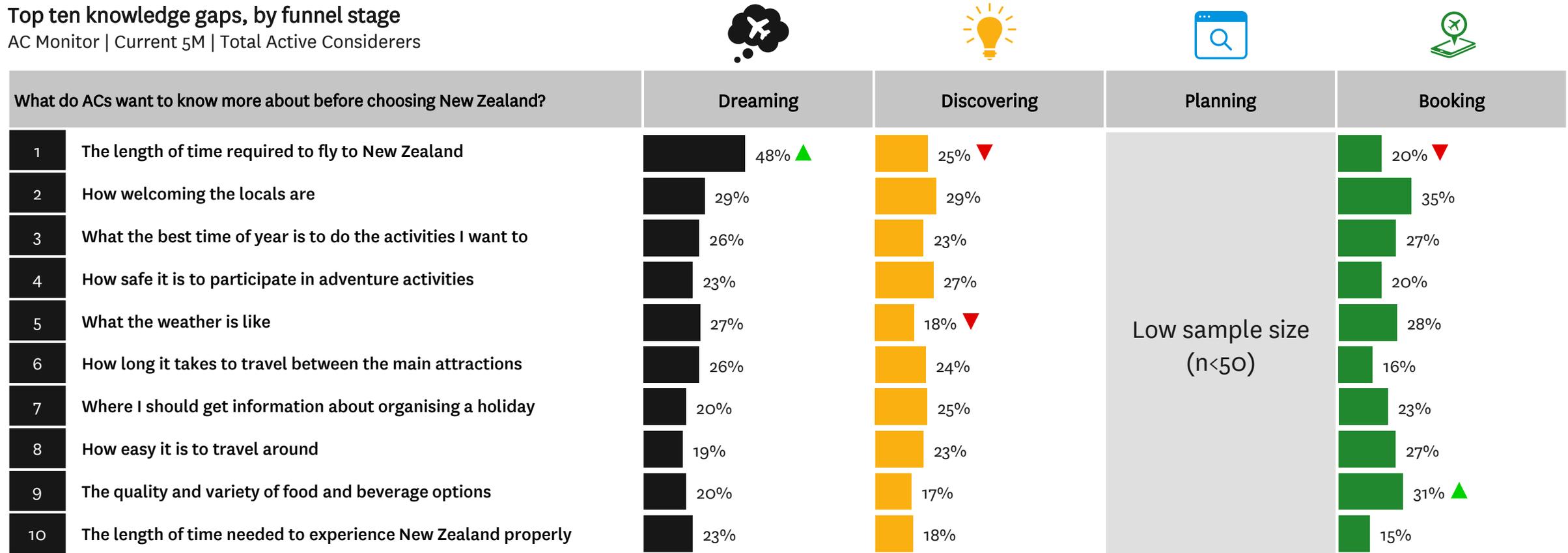
Ranks higher now than six months ago
▲
▼ Significantly higher / lower than previous period at 95%

# Dialling up messaging around the quality and variety of food and beverage options will have the greatest impact on ACs in the booking phase

## Top ten knowledge gaps, by funnel stage

AC Monitor | Current 5M | Total Active Considerers

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



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

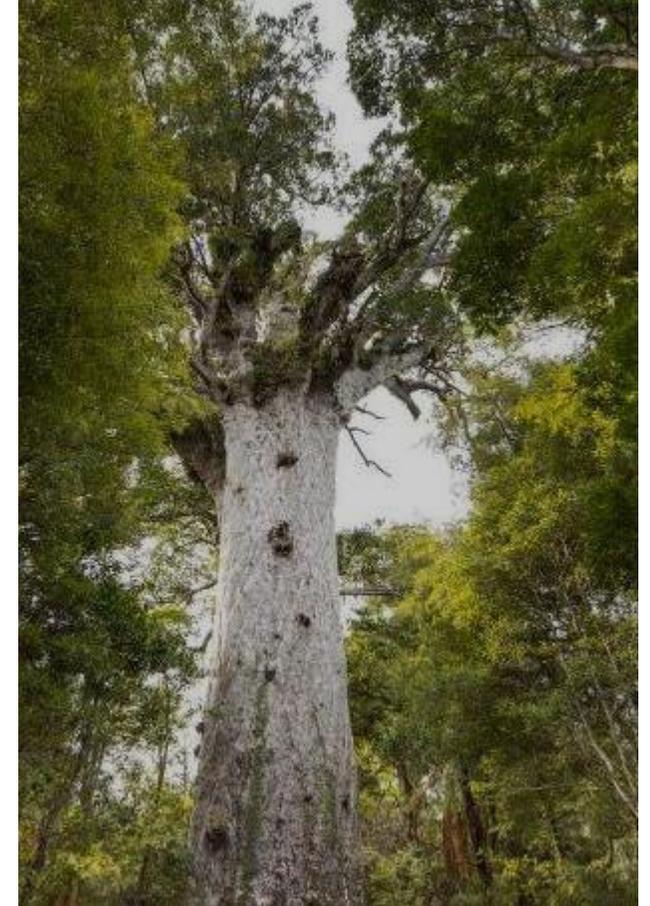
# ACs who have yet to book require more time to research New Zealand as a holiday destination, as well as waiting for deals on flights and accommodation

## Barriers to booking holiday to New Zealand

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

		Previous 6 months
I have more research to do about New Zealand as a holiday destination	35% ▲	8%
Waiting for a good package deal on flights and accommodation	34%	30%
Waiting for a deal on flights	26%	34%
Waiting for the right life circumstances to travel	18%	16%
I'm still deciding on what time of year I want to travel	16%	20%
It's too expensive to travel to New Zealand	15%	14%
Waiting to accrue enough annual leave	11%	12%
Visa process is confusing / difficult	10%	13%
Don't have enough time to experience it properly	9%	20%
New Zealand is too far away / the flight is too long	6%	13%
Don't have time to plan the trip at the moment	6%	17%
I can't afford it at the moment	4%	15%

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

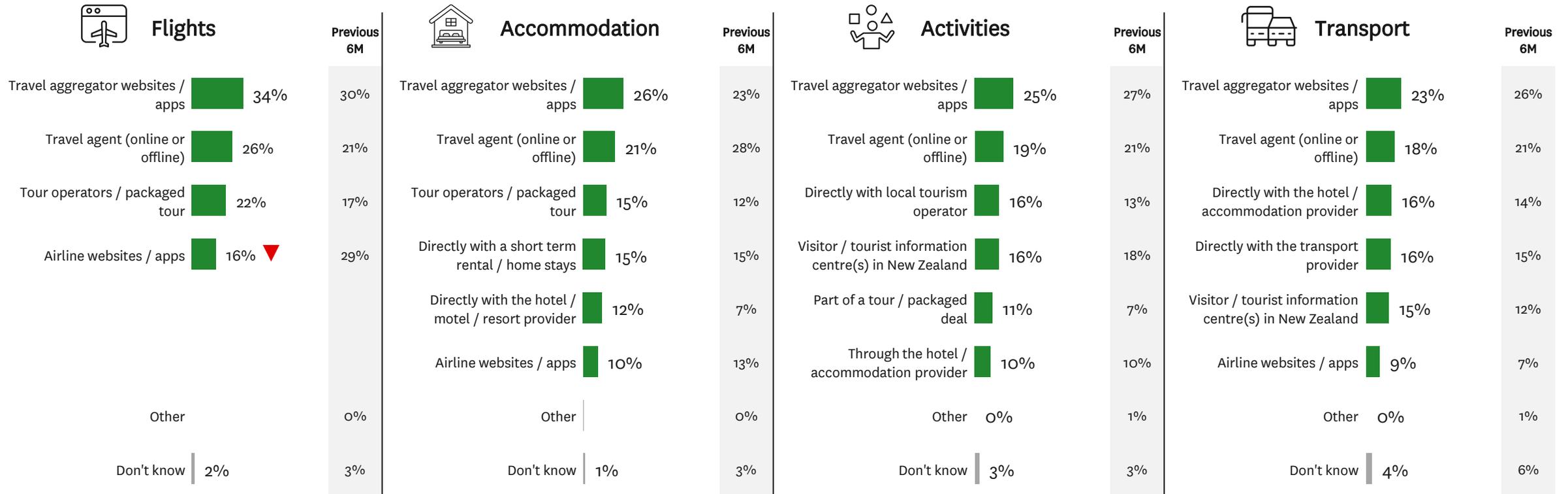


# Travel aggregators and travel agents have the greatest ability to influence holiday decisions across all facets

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

AC Monitor | Current 5M | Total Active Considerers

**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.



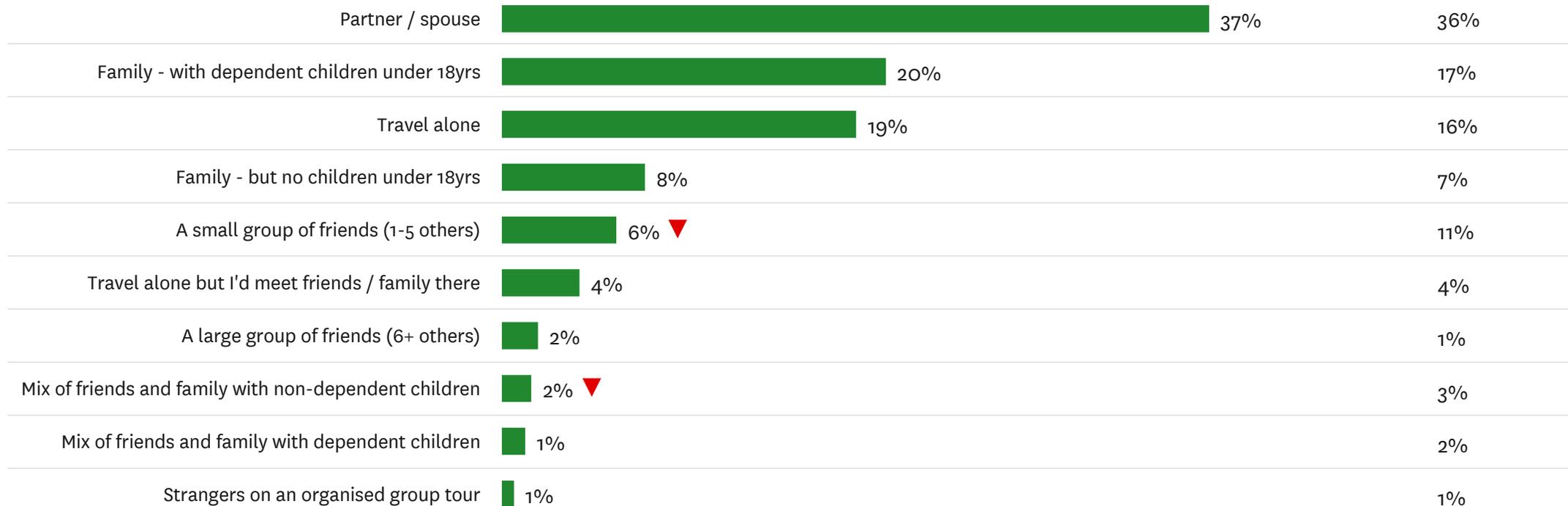
▲ ▼ Significantly higher / lower than previous period at 95%

# German ACs are most likely to travel to New Zealand with their partner / spouse, followed by travelling as a family group

## Likely travel party for a New Zealand holiday

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

Previous 6 months



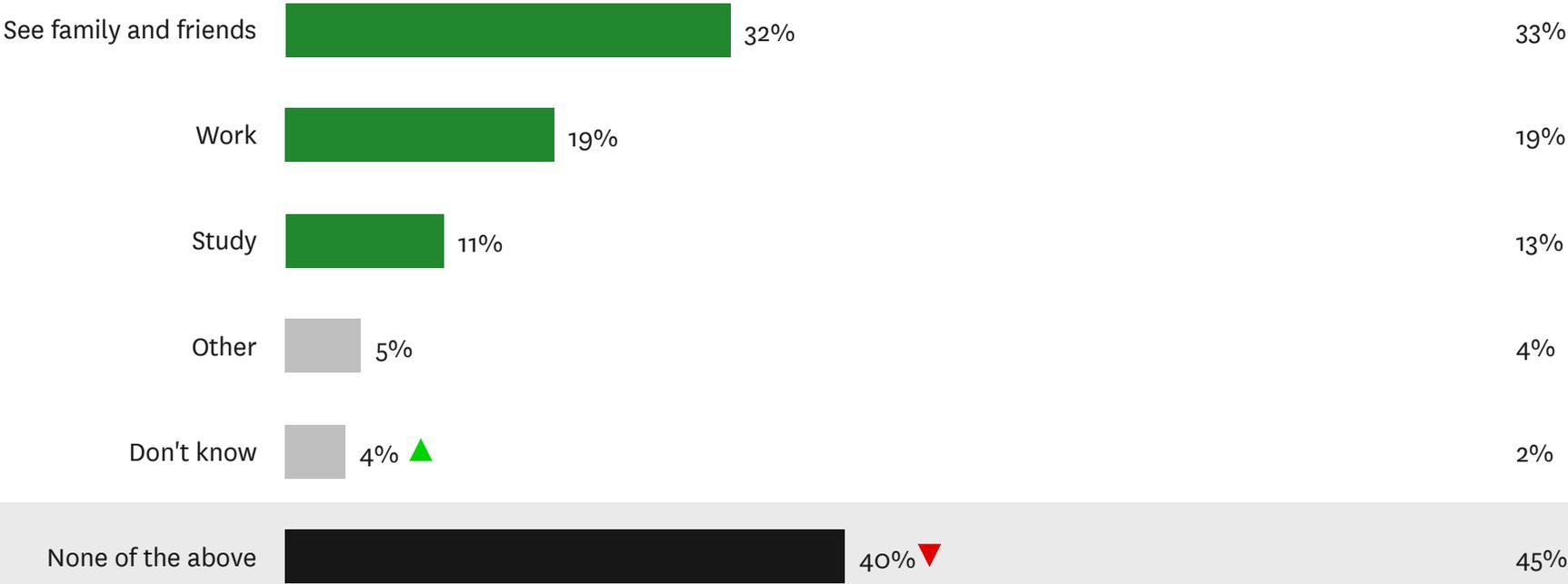
▲ ▼ Significantly higher / lower than previous period at 95%

# 40% of the AC pool intend to visit New Zealand for a holiday only, while 32% would look to visit family and friends

## Additional intentions when on holiday in New Zealand

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

Previous 6 months



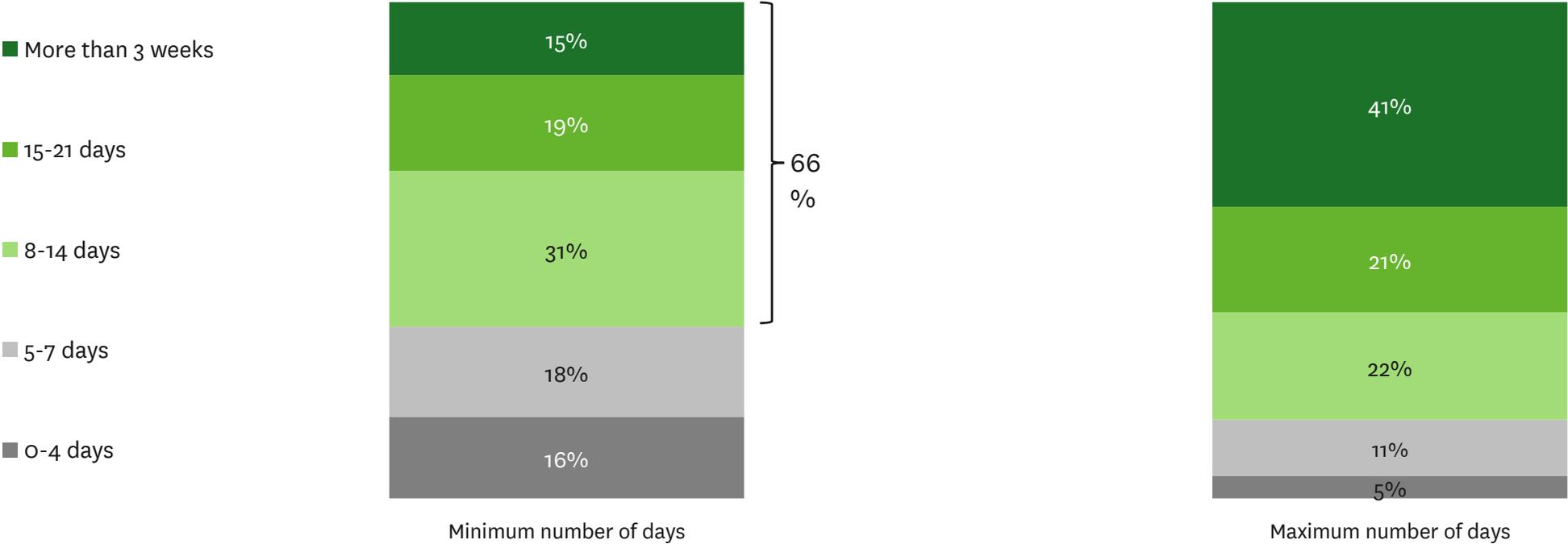
*This represents ACs who are considering travelling to New Zealand for a holiday ONLY*

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

# The majority of ACs would spend at least a week in New Zealand, while 41% are open to travelling for more than 3 weeks

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

AC Monitor | Current 5M | Total Active Considerers



8

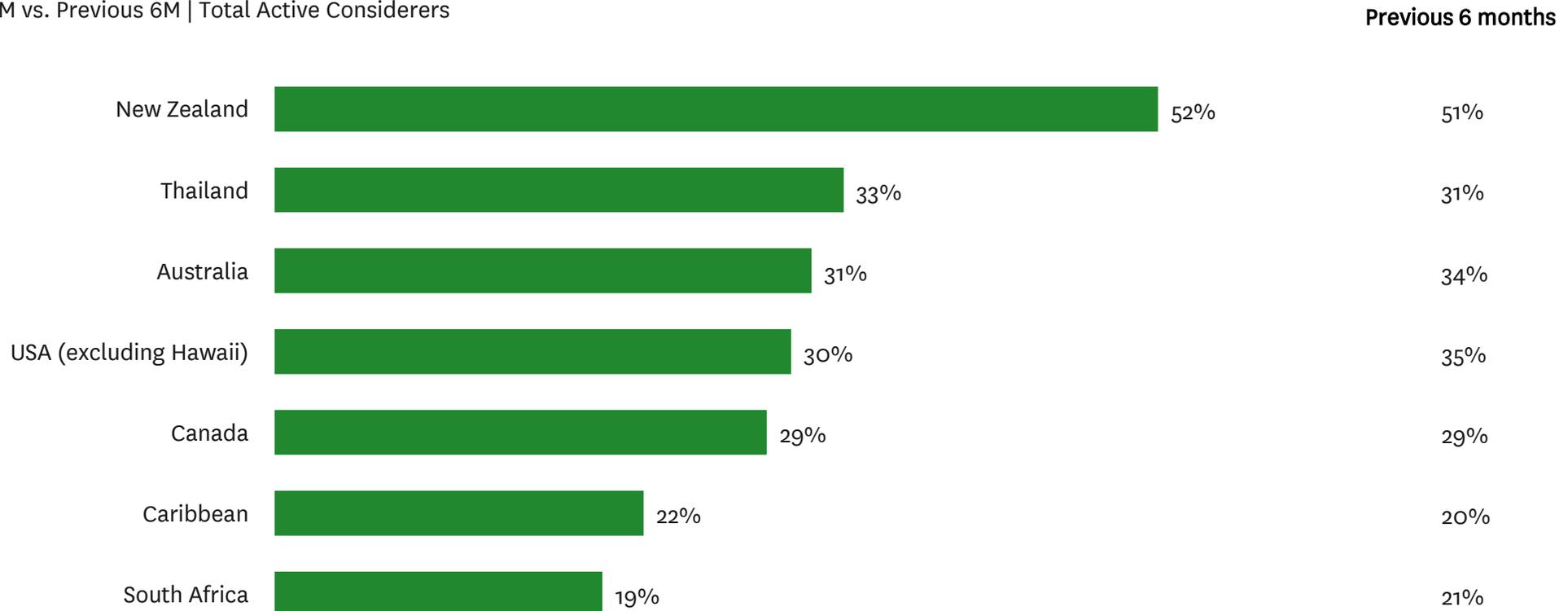
Is TNZ's advertising reaching the desired audience?



# New Zealand destination advertising is more readily recalled than any other competitor, indicating its wider reach and / or stronger memorability

## Holiday destinations seen advertised or promoted recently (Prompted Awareness)

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

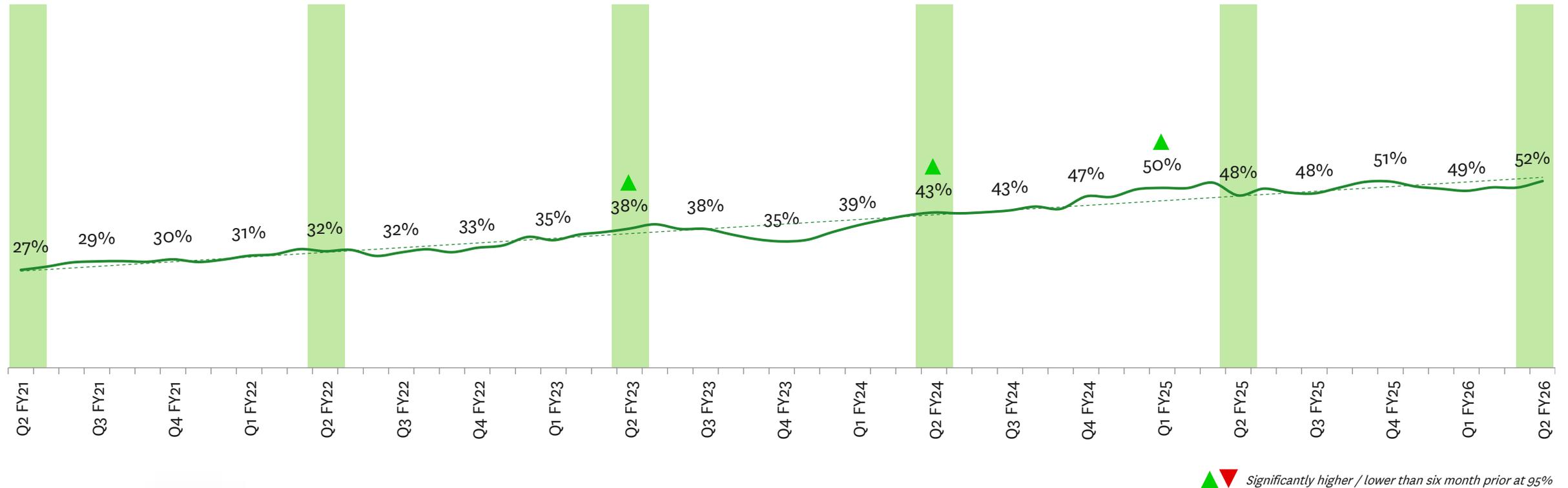


  Significantly higher / lower than previous period at 95%

# Destination New Zealand advertising awareness has a long-term upward trend

## Seen New Zealand advertised or promoted recently (Prompted Awareness)

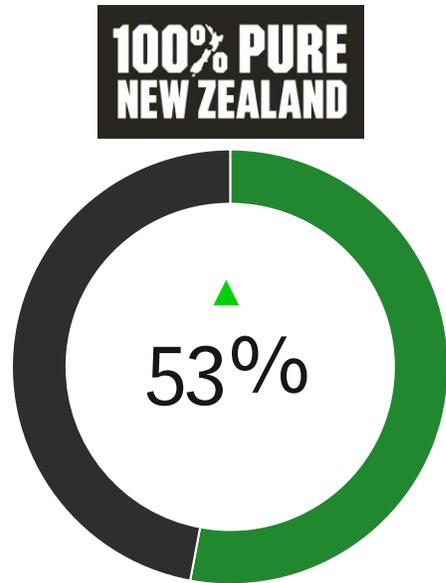
AC Monitor | 6MRA | Total Active Considerers



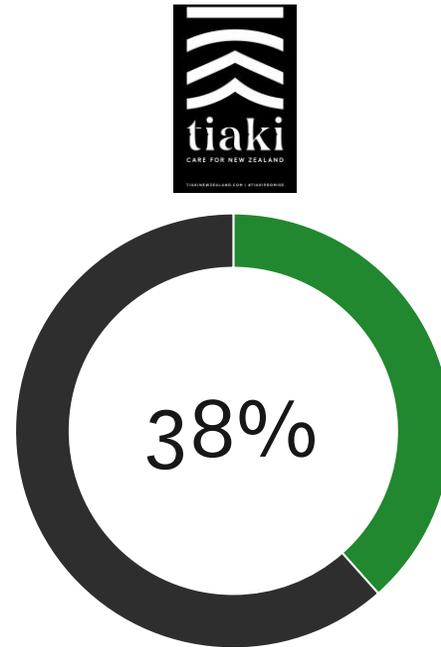
Awareness of 100% Pure New Zealand has significantly improved at 53%, while 65% have seen / heard of newzealand.com; awareness of Tiaki is at 38%

Asset awareness

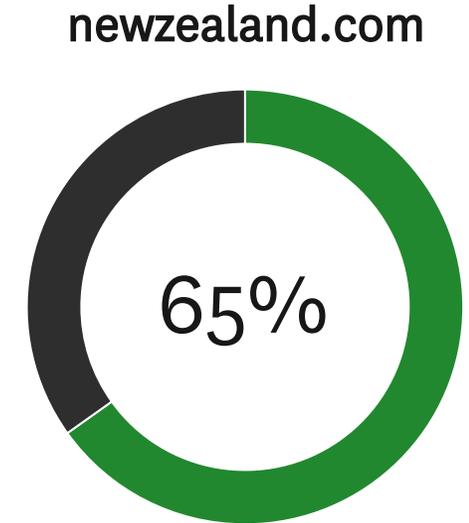
AC Monitor | Current 5M vs. Previous 6M | Total Active Considerers



■ Aware ■ Not aware



■ Aware ■ Not aware



■ Aware ■ Not aware

Previous 6M

41%

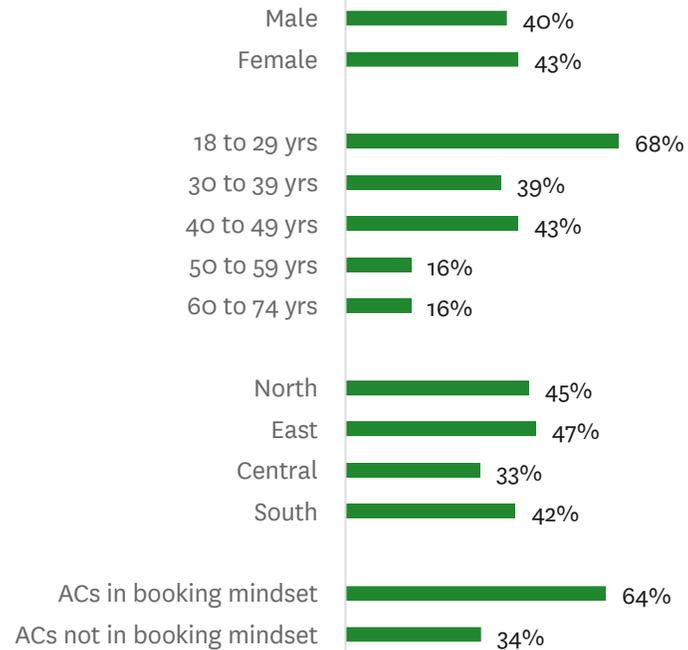
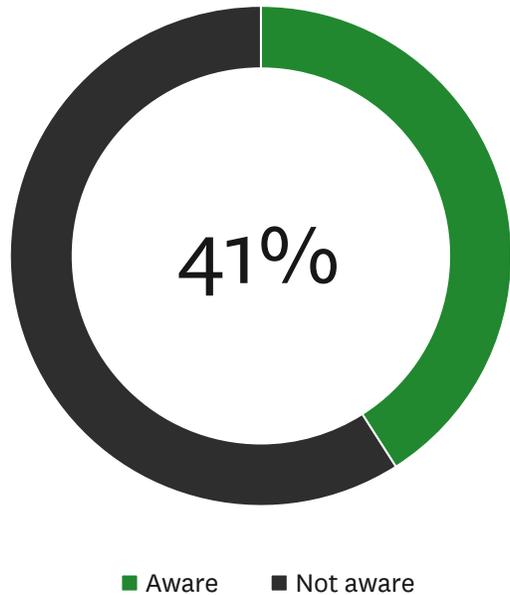
34%

66%

# 41% of ACs have seen the Ariki campaign ad, with awareness skewing towards those aged 18 to 29 years old, and those in the booking mindset

## Ariki Campaign awareness

AC Monitor | Current 5M | Total Active Considerers



9

Appendix

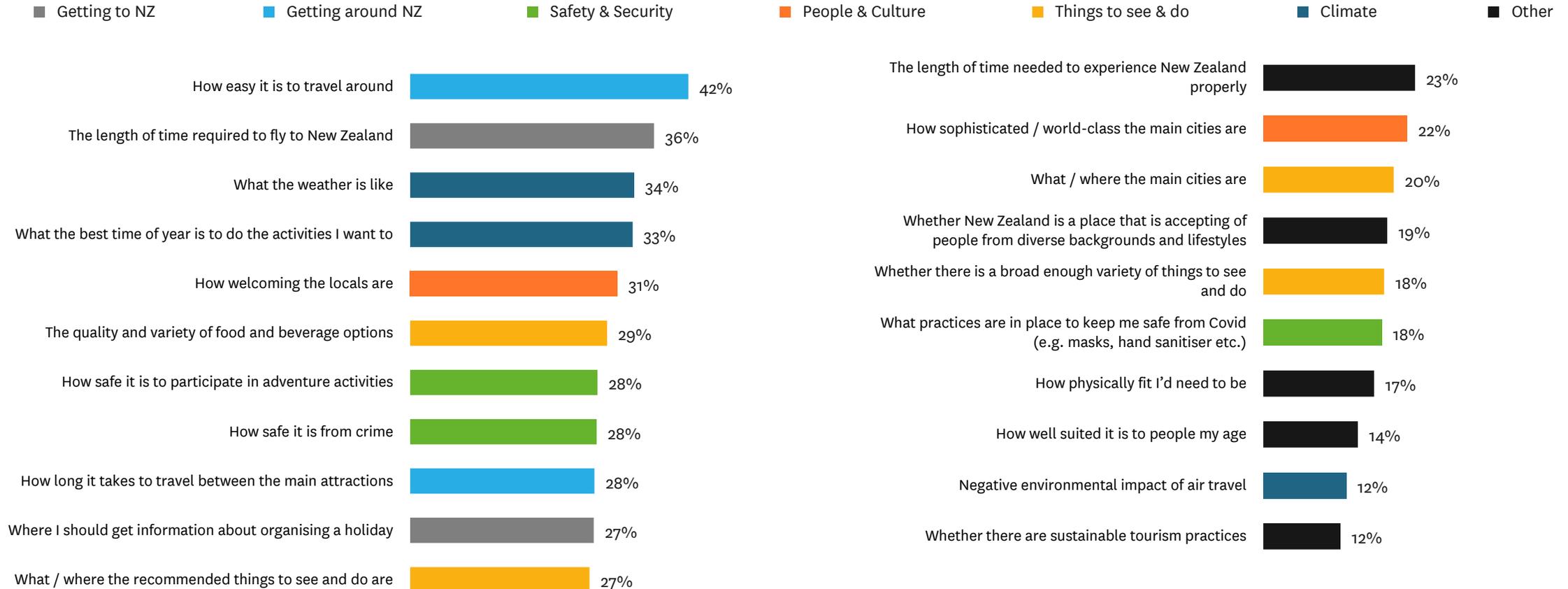




UNITED KINGDOM

# Knowledge gaps (full list)

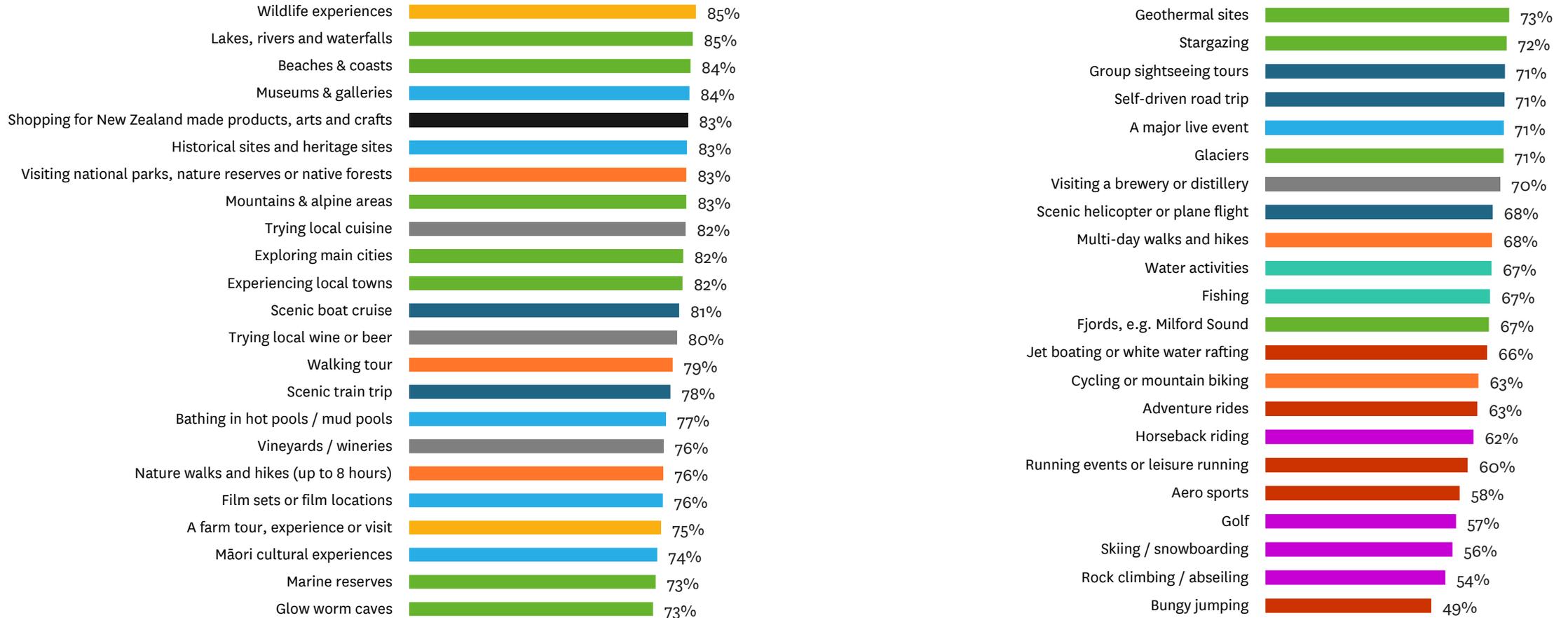
AC Monitor | Current 5M | Total Active Considerers



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

AC Monitor | Current 5M | Total Active Considerers

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

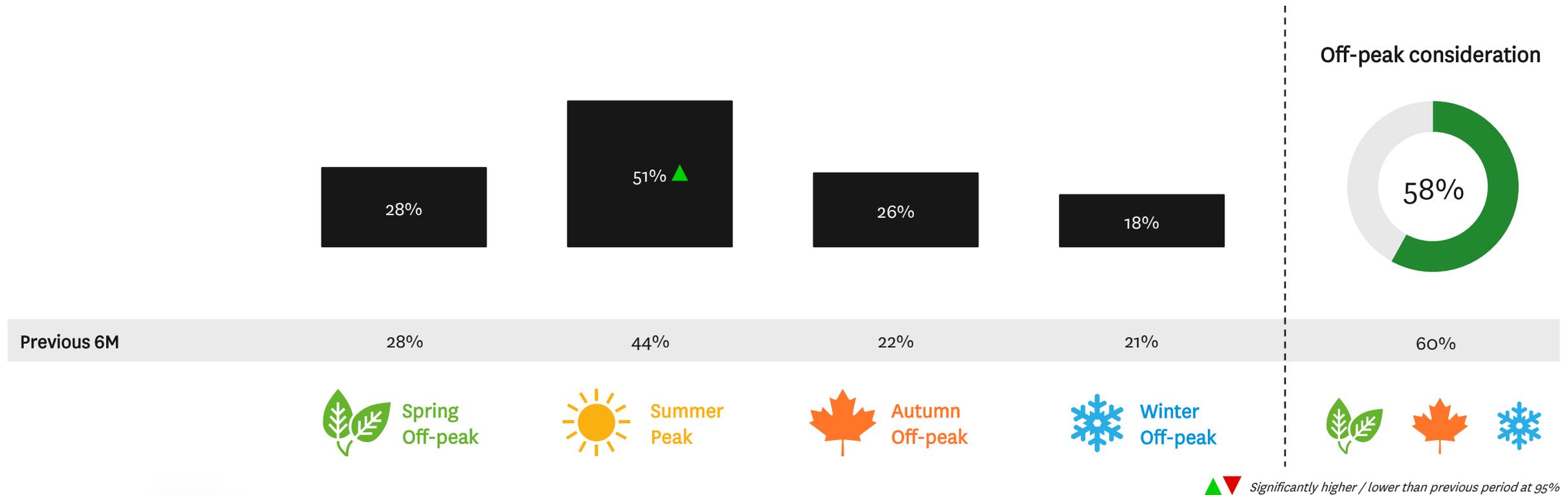


# Consideration for summer travel to New Zealand has seen a sizeable jump compared to six months ago, while 58% of ACs would still consider travelling during off-peak seasons



## Seasons – Consideration

AC Monitor | Current 5M | Total Active Considerers



# Of those who agree that New Zealand is a preferred destination, 17% do not meet the spend threshold of £1500

## Spend on holiday in New Zealand

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



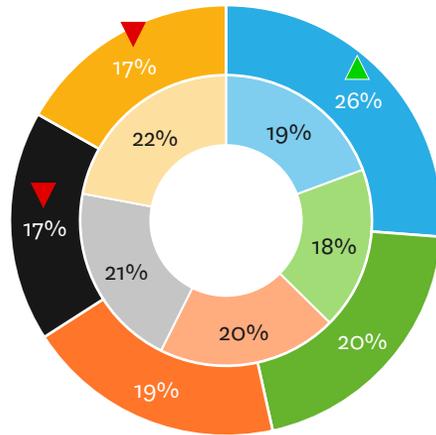
# The profile of those who find New Zealand appealing skews more towards males, 18-29 year olds and those residing in London

## Profile of those who find New Zealand highly appealing

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

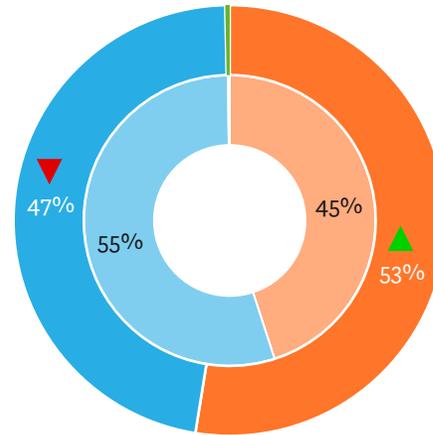
Outer ring: British who find NZ highly appealing  
Inner ring: British who do not find New Zealand highly appealing

By age segment



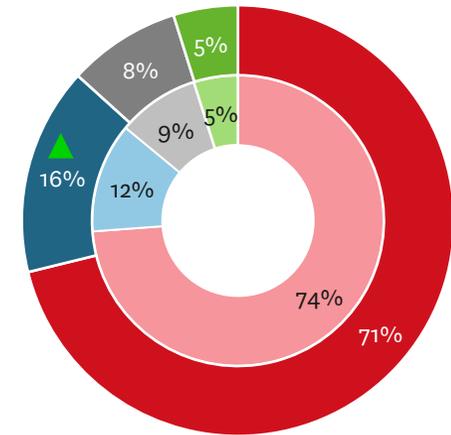
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



- Male
- Female
- Gender diverse

By region



- England
- London
- Scotland
- Wales

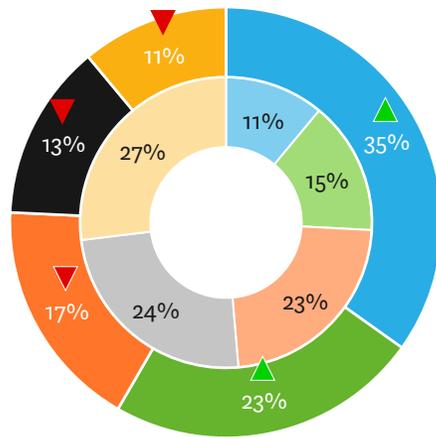
# Compared to non-considerers, those who would consider visiting New Zealand are skewed towards males, those aged 18-39 years and residing in London

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

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

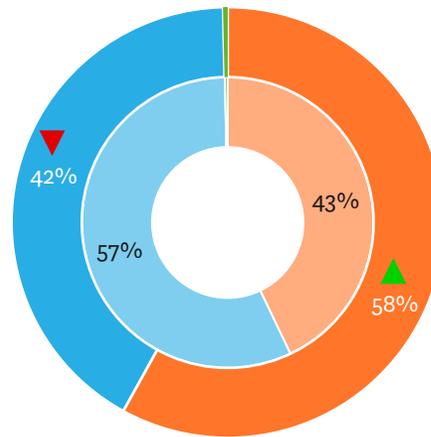
Outer ring: British who would seriously consider visiting New Zealand  
Inner ring: British who would not seriously consider visiting New Zealand

By age segment



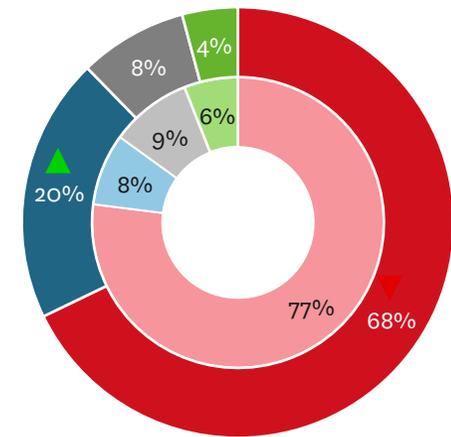
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



- Male
- Female
- Gender diverse

By region



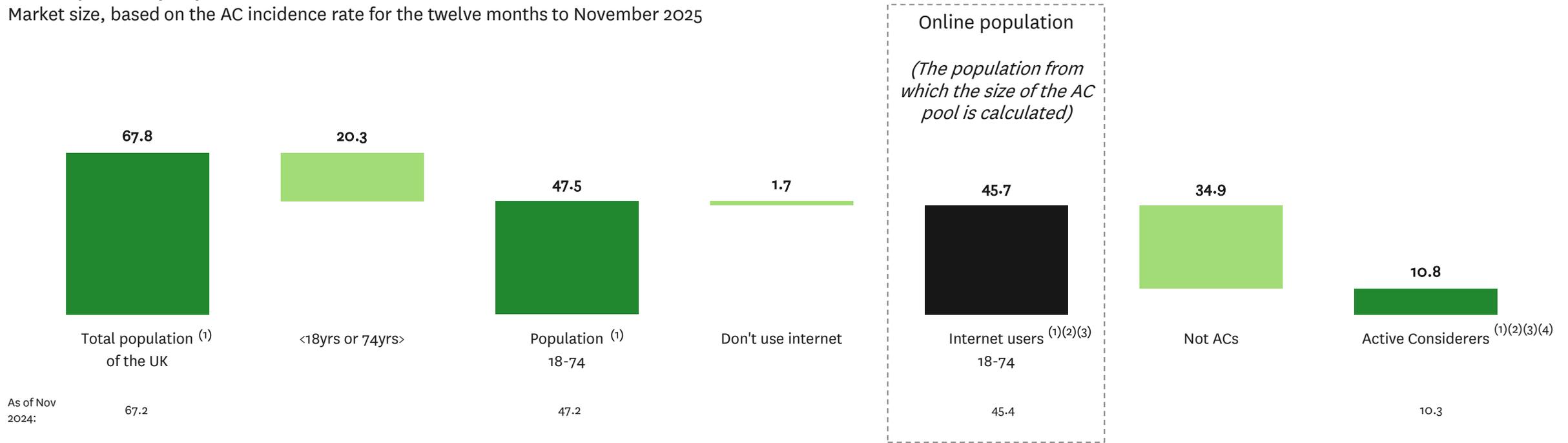
- England
- London
- Scotland
- Wales

# Out of an online population of approximately 45.7 million people, 10.8 million are classified as ACs



## Nov 25 | Million people

Market size, based on the AC incidence rate for the twelve months to November 2025



SOURCES/NOTES:

- (1) UK Office for National Statistics, MYE2: Persons by single year of age and sex for local authorities in the UK; Time period: Nov 2025; Coverage: All persons in the United Kingdom
- (2) Worldometer population clock, UK; Time period as at November 2025
- (3) UK Office for National Statistics, Table 1B: Recent and lapsed internet users and internet non-users, UK; Time period: 2020; Coverage: Persons aged 16 years and over; Internet user definition: Adults who have used the internet within the last 3 month
- (4) Tourism New Zealand, Active Considerer Monitor United Kingdom; Time period: Dec-Nov 2025, under the latest AC definition
- (5) Northern Ireland excluded
- (6) Kantar Analysis



GERMANY

KANTAR

# Knowledge gaps (full list)

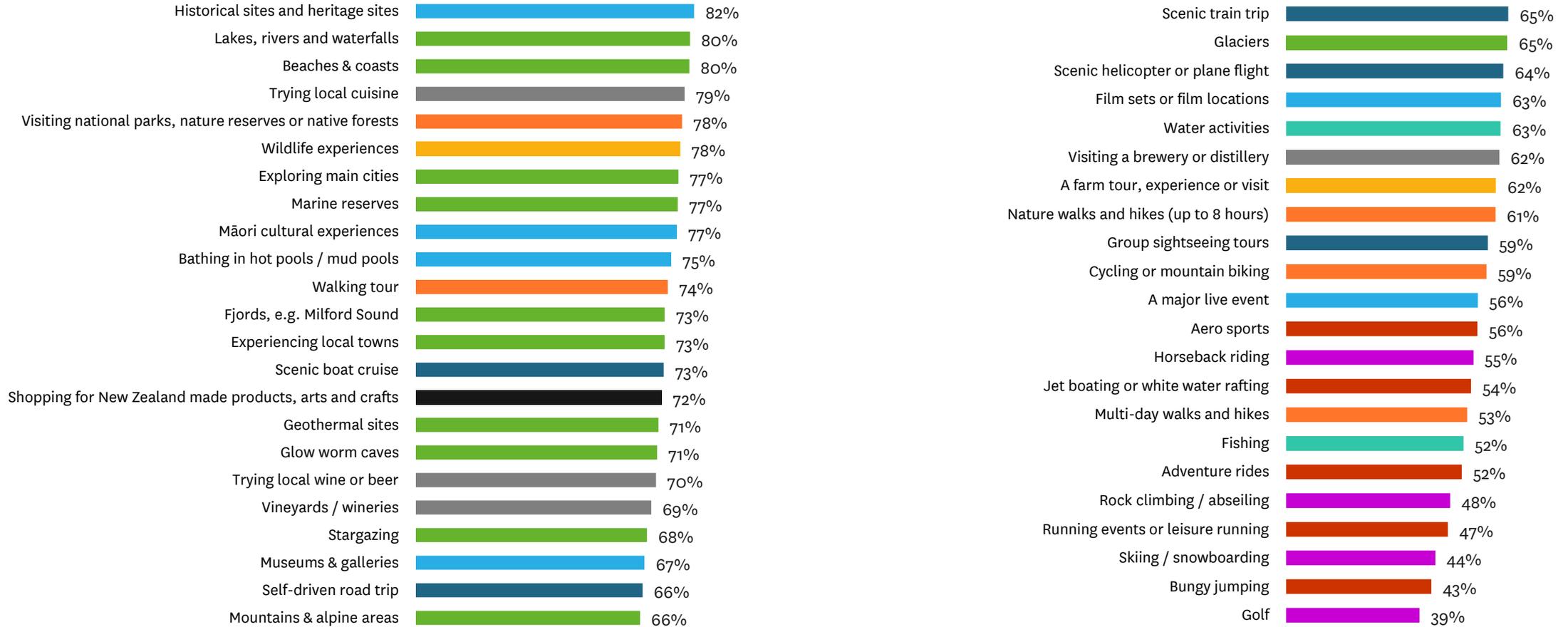
AC Monitor | Current 5M | Total Active Considerers



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

AC Monitor | Current 5M | Total Active Considerers

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

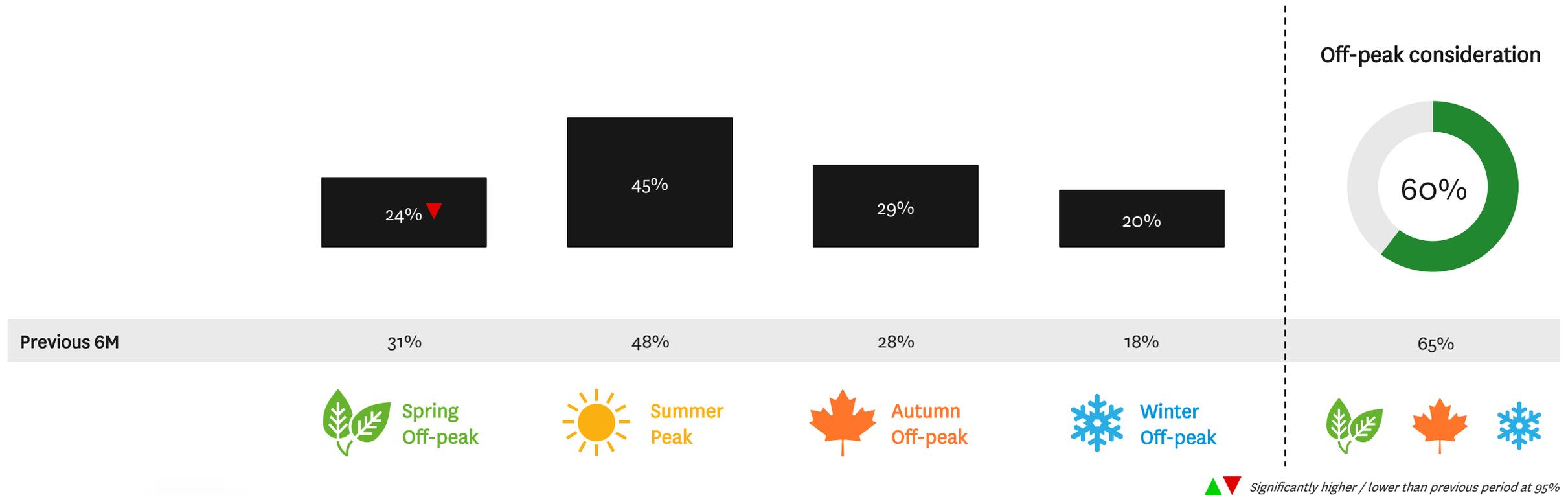


# While consideration for travelling to New Zealand during spring has taken a sizeable dip, 60% of ACs would still consider visiting New Zealand during off-peak seasons



## Seasons – Consideration

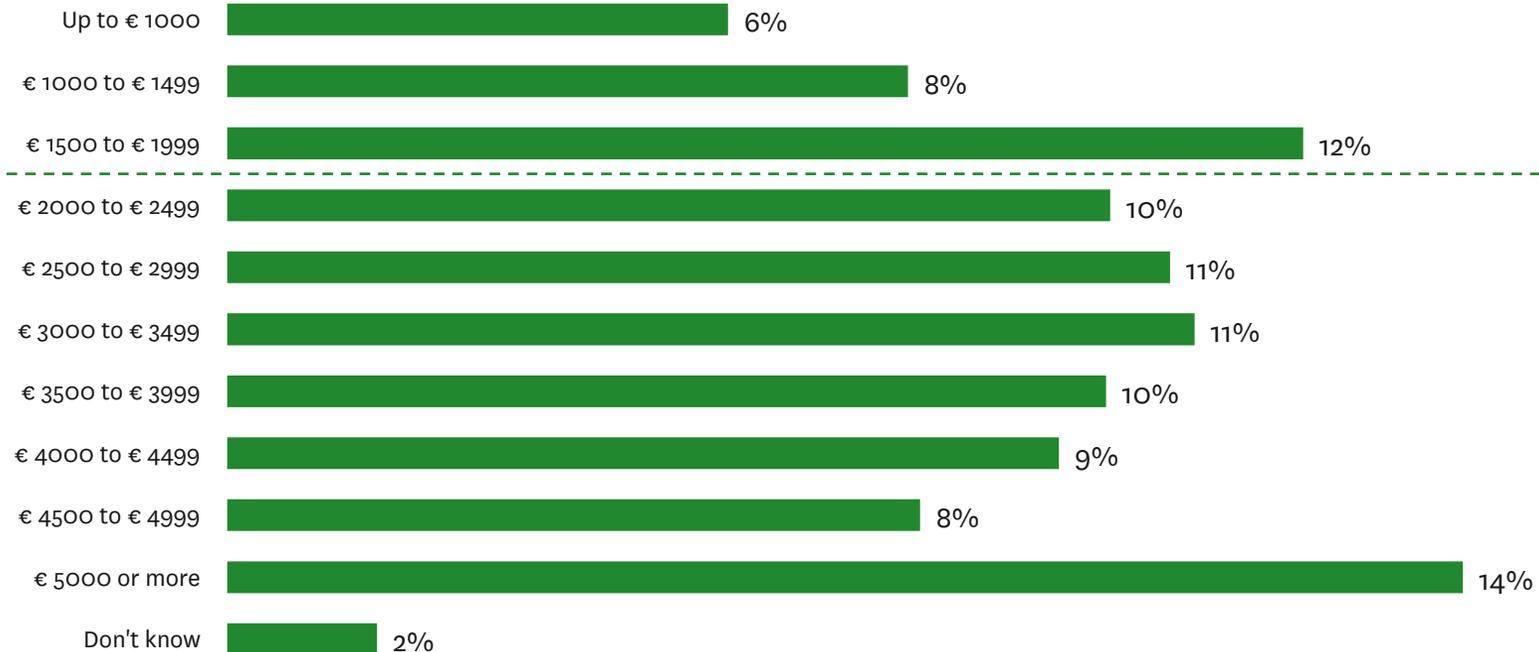
AC Monitor | Current 5M | Total Active Considerers



# Of those who agree that New Zealand is a preferred destination, 26% do not meet the spend threshold of €2000

## Spend on holiday in New Zealand

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



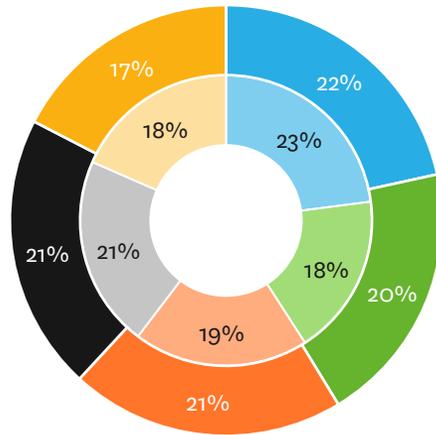
# Compared to those who do not find New Zealand appealing, those who do are more likely to be male but less likely to be living in Central Germany

## Profile of those who find New Zealand highly appealing

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

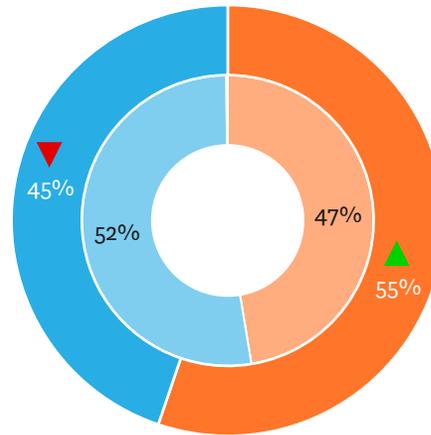
Outer ring: Germans who find NZ highly appealing  
Inner ring: Germans who do not find New Zealand highly appealing

By age segment



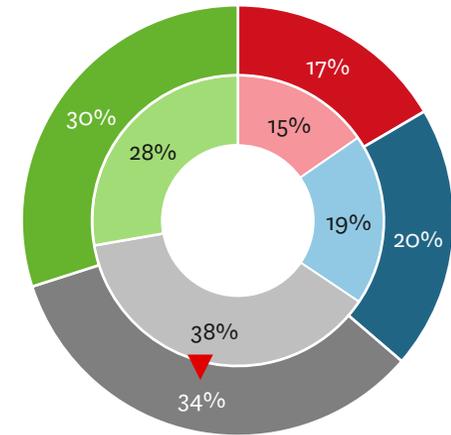
- 18 - 29 years
- 30 - 39 years
- 40 - 49 years
- 50 - 59 years
- 60 - 74 years

By gender



- Male
- Female
- Gender diverse

By region



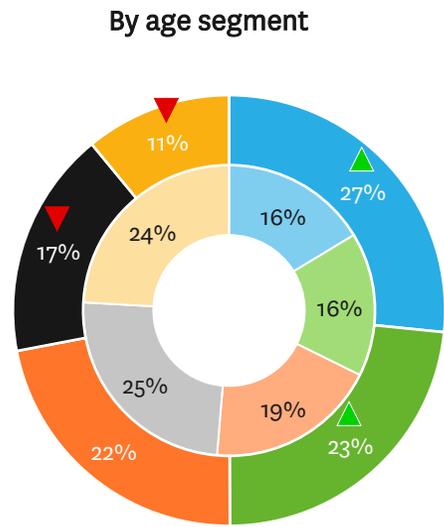
- North
- East
- Central
- South

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

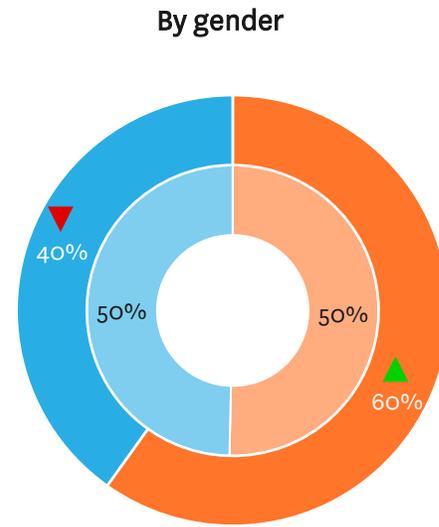
## Profile of those who would seriously consider visiting New Zealand

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

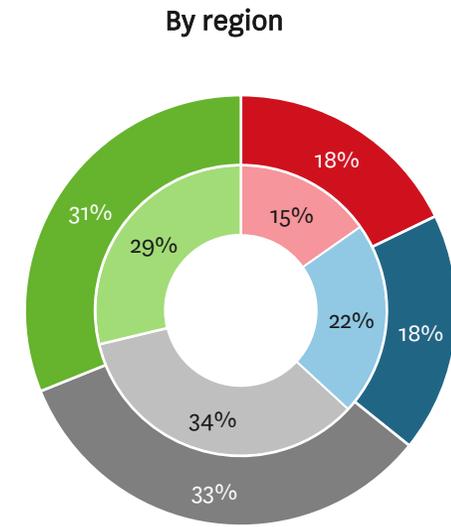
Outer ring: Germans who would seriously consider visiting New Zealand  
 Inner ring: Germans who would not seriously consider visiting New Zealand



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



- Male
- Female
- Gender diverse



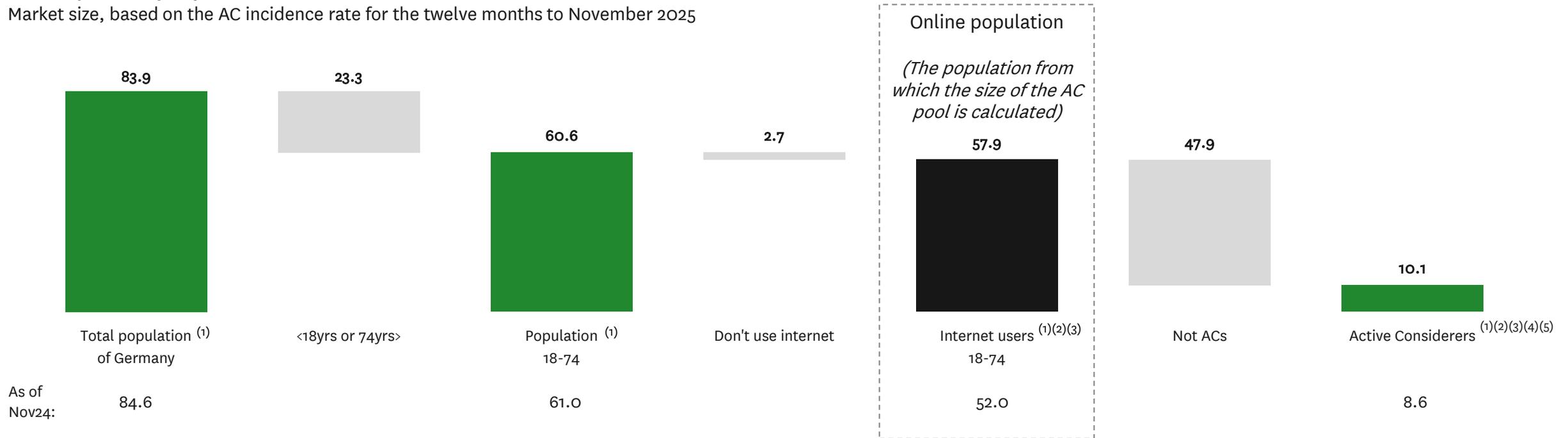
- North
- East
- Central
- South

# Out of an online population of approximately 57.9 million people, 10.1 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 twelve months to November 2025



SOURCES/NOTES:

- (1) Federal Statistical Office, Population: federal states, date, sex, age years, Time period: 1 November 2025; Coverage: Total population
- (2) Worldometer population clock, Germany; Time period as at 1 November 2025
- (3) Kantar Population Profiler, Internet usage by age; Coverage: Germany; Time period: 2025
- (4) Tourism New Zealand, Active Considerer Monitor Germany; 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	Green	Light Green	Light Green	Light Green	Light Green	Red
The locals are friendly and welcoming	Red	Light Green	Light Green	Light Green	Light Green	Green
Ideal to relax and refresh	Green	Light Green	Light Green	Light Green	Light Green	Red
I would feel safe travelling around this destination	Light Green	Red				
Things to see and do are affordable	Red	Light Green	Light Green	Light Green	Light Green	Green
Affordable to fly to this destination	Red	Light Green	Light Green	Light Green	Light Green	Green

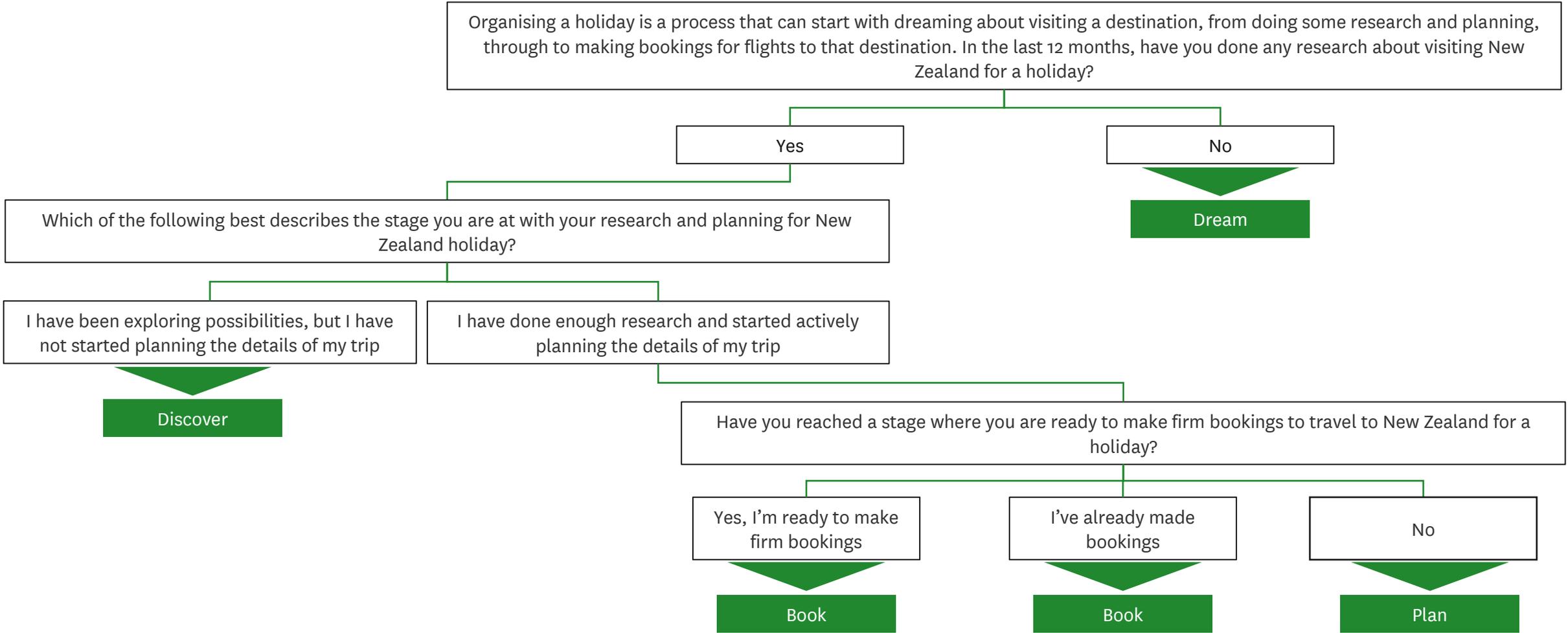
Annotations in the table:

- A horizontal arrow points from the New Zealand column to the Thailand column in the first row.
- A vertical arrow points from the New Zealand column down to the bottom row.
- Text in the second row: "We look at how a given number of competitors perform on a given number of attributes to derive an index that measures expected performance"
- Text in the third row: "It's key to note that the score is relative - any change to the competitor and / or attribute sets will result in a change in the indices"
- Text in the fourth row: "For example, when we look at the top 10 versus when we look at the 12 monitor attributes, the scores reported for those same attributes will be different in each attribute set"



# Appendix: Visitor consideration funnel

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



# 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
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