

# KANTAR

## Active Considerer (AC) Monitor India (Q2 FY22)

Tourism New Zealand

Published November 2021



# Fieldwork timings and target audience definition



- Unlike for top six markets where monitor data is collected monthly, Emerging Markets including India take a point-in-time read of the market approach as Tourism New Zealand (TNZ) requires
- The months in which fieldwork occurred for each reported quarter are to the right

## Target population definition

- In India, our target population, is defined as online population, 18-74 years of age, residing in New Delhi, Bangalore or Mumbai

## Active Considerers definition

- In FY21 the definition of Active Considerers (AC) was revised: the minimum spend threshold was increased to **160,000 INR** (it was 120,000 INR until Q4 FY19 inclusive)
- All historical results in this report have been recalculated based on the revised AC definition

Reported quarter	Month in which data was collected for that quarter
Q4 FY17	April 2017
Q1 FY18	September 2017
Q3 FY18	March 2018
Q1 FY19	September 2018
Q4 FY19	April 2019
Q1 FY21	September 2020
Q2 FY22	October 2021

# Key insights (page 1 of 2)



## Insight 1

Incidence of Active Considerers (ACs) has bounced back to pre-Covid levels (based on adjusted figures, Q4 FY19).

- The AC incidence in the target cities has improved to 37% (from 27% in Q1 FY21) - this equates to approximately 12.1m ACs
- AC incidence has risen due to an uplift in appeal and consideration for New Zealand among target population
- There has also been an increase in willingness to spend: a significantly larger proportion of the target population are willing to spend more while travelling to New Zealand (57% now, from 44% in Q1 FY21)
- First choice preference for New Zealand has slightly dropped

### Incidence of Active Considerers



Q1 FY21

Q2 FY22

### First choice preference for New Zealand



Q1 FY21

Q2 FY22

## Key insights (page 2 of 2)



### Insight 2

ACs are eager to travel once travel restrictions are eased, however prefer to avoid destinations that require additional procedures/documents to enter the country (i.e. health certification, insurance, quarantine, etc.)

- 66% of ACs want to travel overseas within three months of restrictions easing
- Half of Indian ACs choice of destination is likely to be guided by the success of the destination in managing Covid-19
- Despite that, 78% of ACs are willing to forego their preferred holiday destination for destinations with simpler entry requirements, such as minimal documentation, testing, and screening. This signifies the importance of simplifying the entry process through clear communication of what is required, and how to go about it

### Pend-up demand for international holiday travel

66%

Would like to travel within 3 months of easing restrictions

24%

Would like to travel within 4 to 6 months of easing restrictions

78%

Would choose a destination with minimal documentation, testing and screening requirements

# Active Considerer journey funnel – India

## These estimates are updated every wave

Total population

1340.9m

Online population, 18-74 years of age, in target cities

32.2m

*Conversion*

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

81%

26.1m

*Conversion*

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

88%

22.9m

*Conversion*

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

92%

21.1m

*Conversion*

Willing to spend at least INR 160,000 per person on a holiday to New Zealand<sup>(1)</sup>

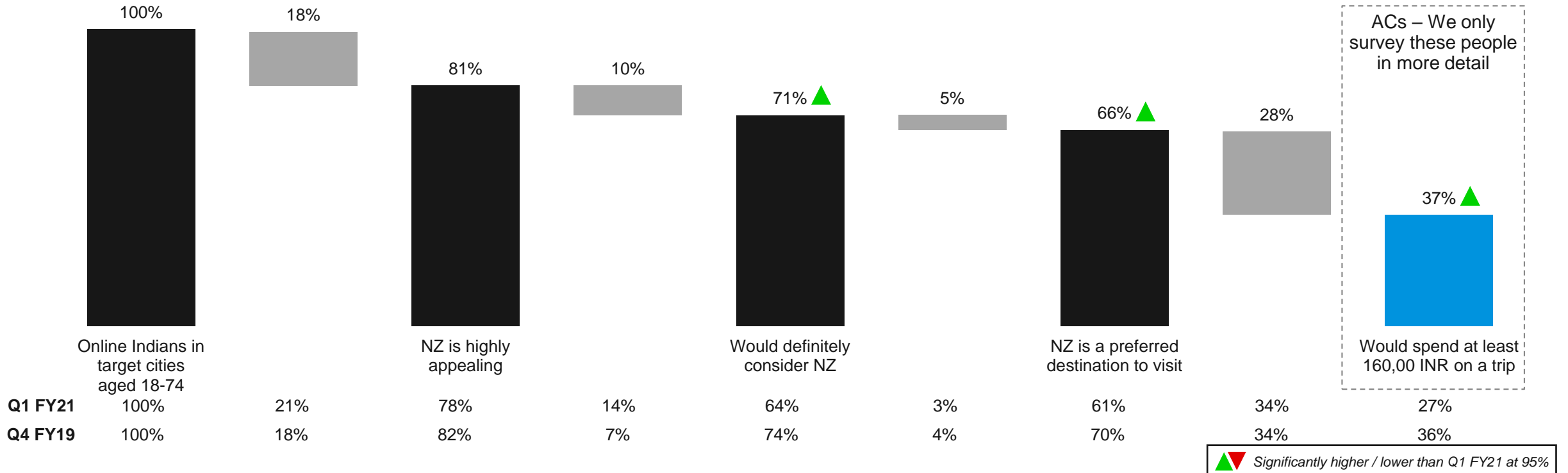
57%

12.1m

# The AC incidence has bounced back to pre-Covid levels (Q4 FY19), sitting at 37%

## Qualifying criteria for defining ACs

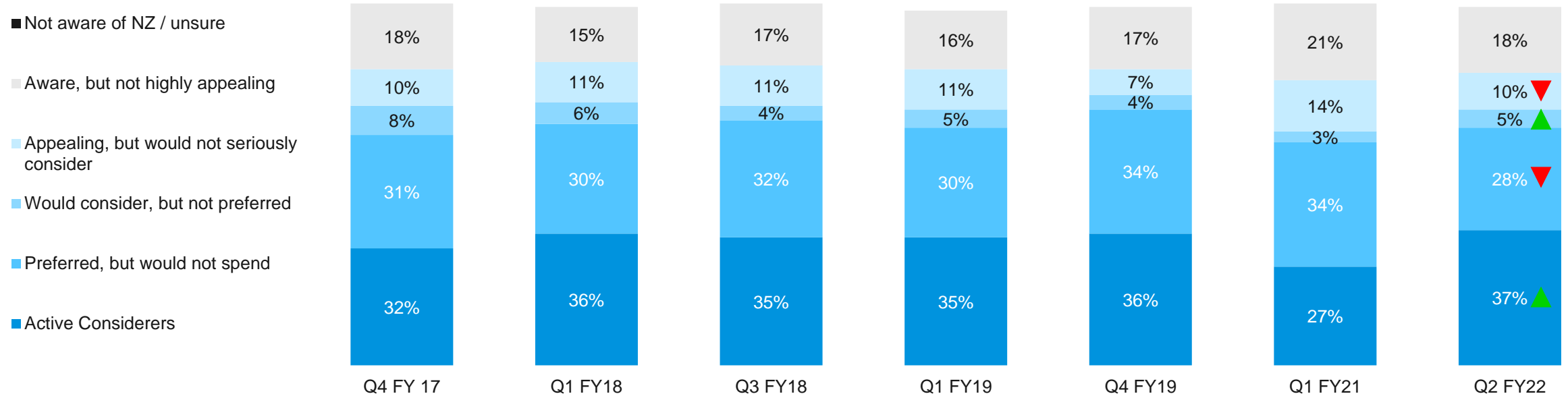
% Online users aged 18-74



# The increase in the AC incidence in Q2 FY22 is attributed to a larger proportion of the target population willing to spend more while travelling to New Zealand

## Incidence of Active Considerers in target cities, over time

% Online target population aged 18-74

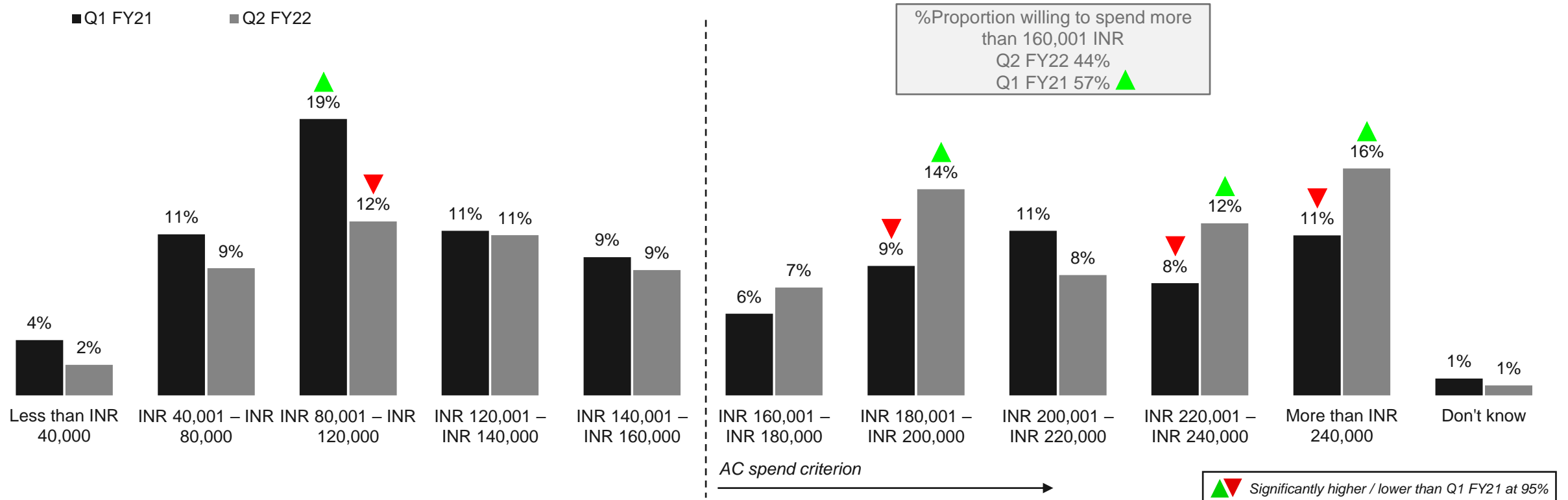


▲ Significantly higher / lower than last wave at 95%

# A higher proportion of the target population who prefer New Zealand as a holiday destination are willing to spend more while travelling to New Zealand

## Willingness to spend while travelling New Zealand

% Online target population aged 18-74 & prefer to travel to New Zealand for next holiday

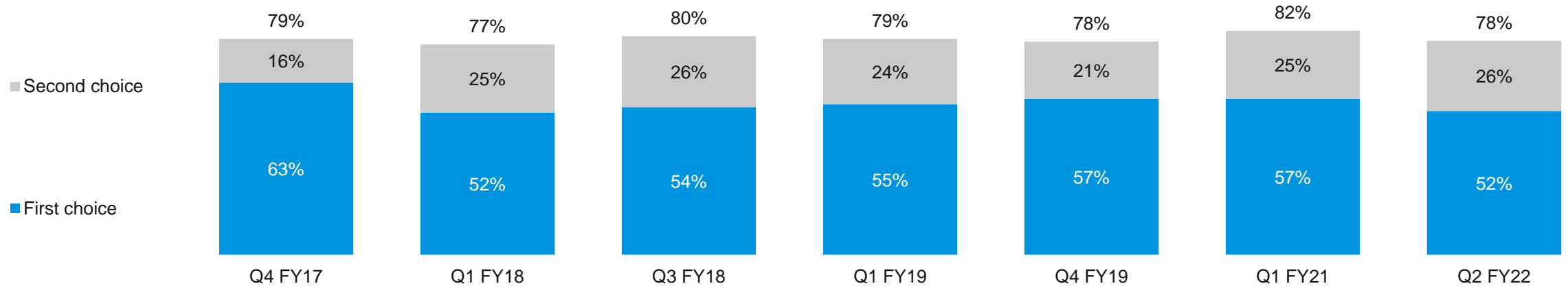




# Preference for New Zealand has slightly dropped since FY21

## Preference KPI for New Zealand

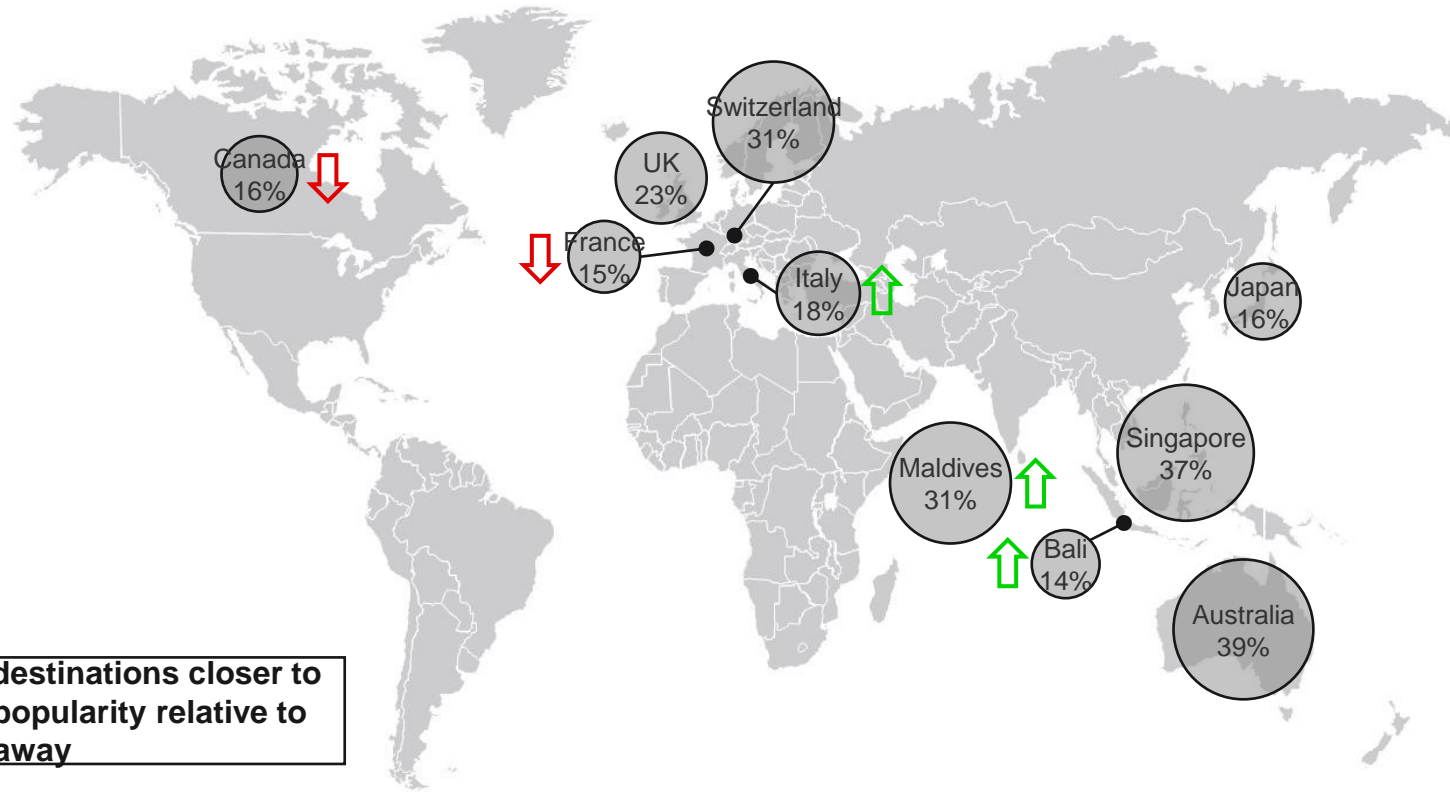
% AC



▲ Significantly higher / lower than Q1 FY21 at 95%

# Australia, Singapore, and Switzerland remain New Zealand's strongest competitors based on preference ranking; Maldives, Italy, and Bali have moved up in preference rank at the expense of Canada and France

Top ten competitor set for ACs  
% AC, Q2 FY22



Overall, geographically destinations closer to India are increasing in popularity relative to further away

↑ ↓ Change in rank by at least two places compared to last wave

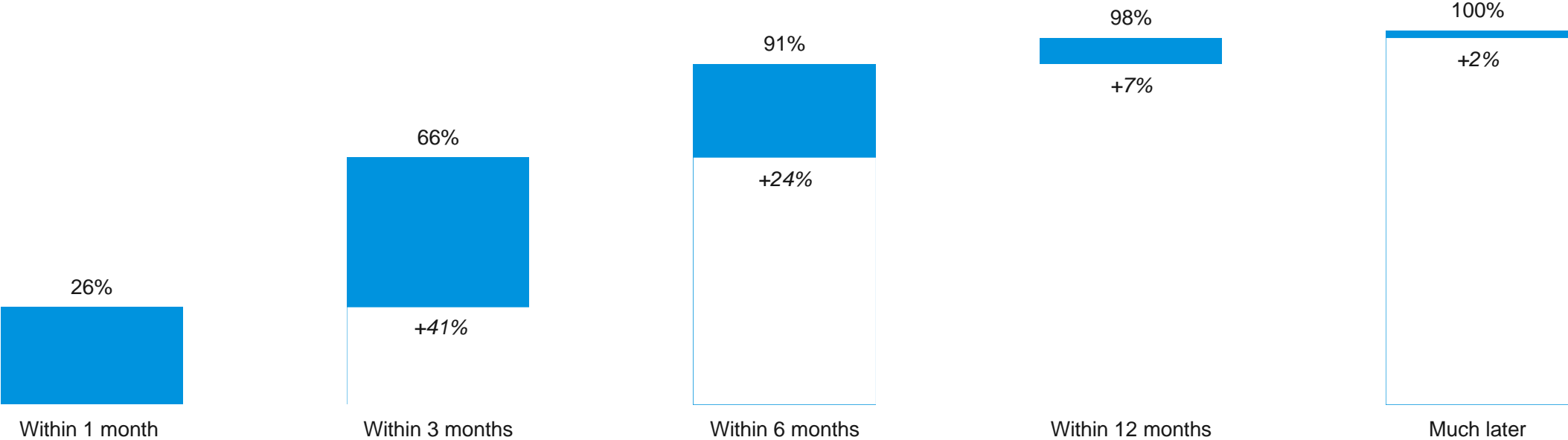
# 1 Covid-19 impact on travel sentiment



# The Indian ACs are eager to travel overseas, with the vast majority ACs looking to take an overseas holiday within six months of easing of travel restrictions

## Speed of overseas holiday demand recovery after restrictions are lifted

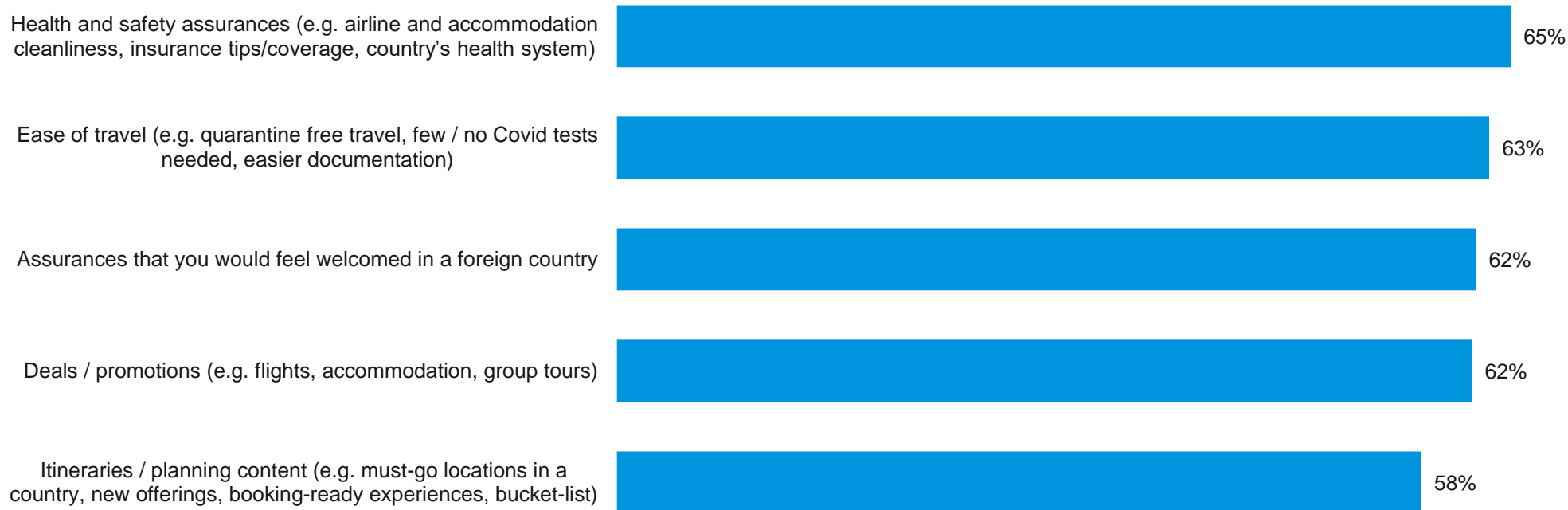
% AC | Q2 FY22



# Reinforcing the eagerness to travel abroad, ACs are eager to hear more about a wide range of information

## Interest to hear about once travel restrictions are lifted (Top box)

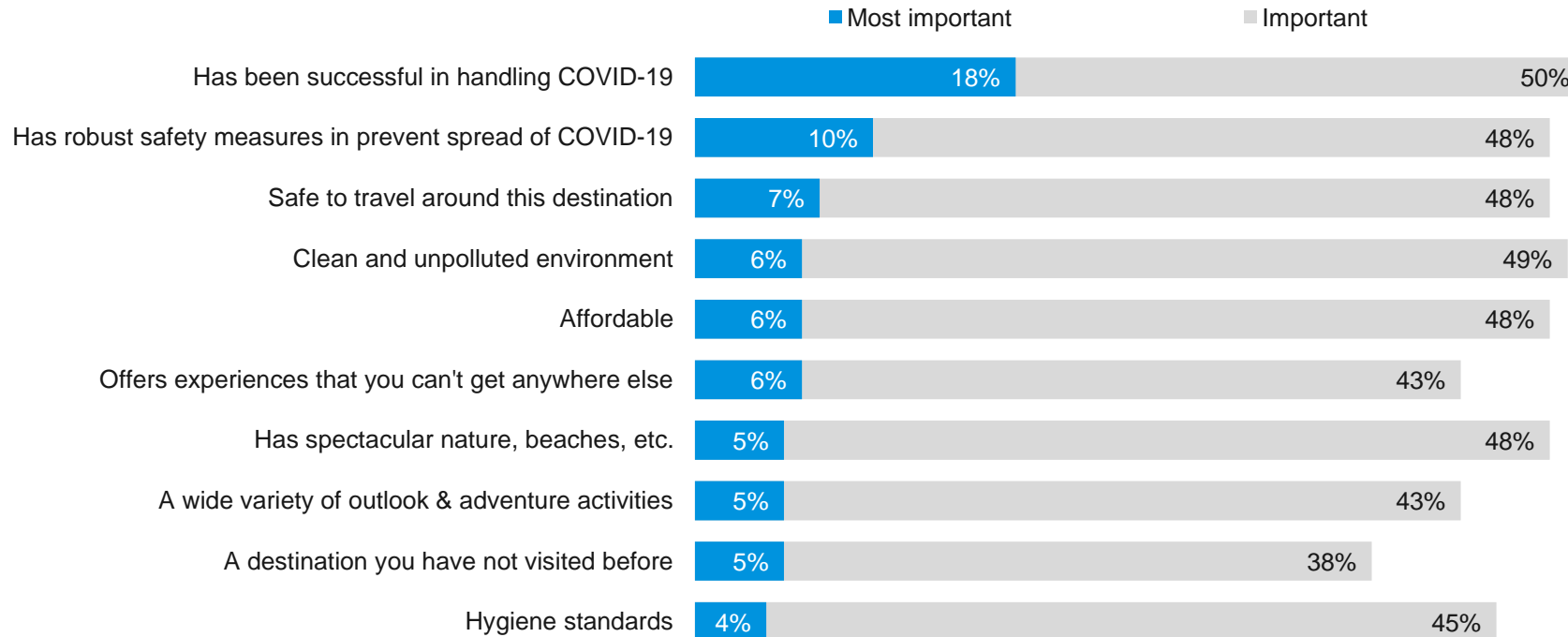
% AC | Q2 FY22



# Successful management of Covid-19 will be an importance driver of holiday destination for half of Indian ACs

## Likely drivers of overseas holiday destination choice, after travel restrictions are lifted

% AC | Q2 FY22

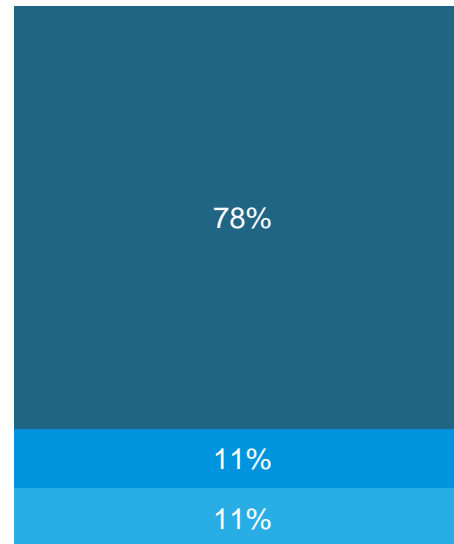


# The majority of ACs would prefer a holiday destination with minimal Covid-related entry requirements – signalling the importance of clear comms around entry conditions/how-tos to simplify the process

## Choice of destination based on procedural requirements

% AC | Q2 FY22

- Yes, I would choose a destination with minimal documentation, testing and screening requirements
- No, as long as I/my family don't have to organise these (e.g. a travel agent can organise these instead)
- No, it would not impact my destination choice
- Don't know



# 2 Appendix



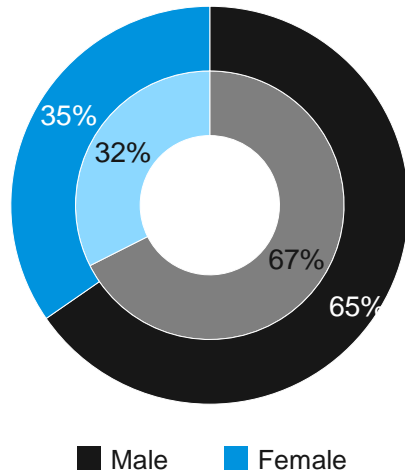


# Indian Active Considerers gender and regional splits are in-line with non-ACs

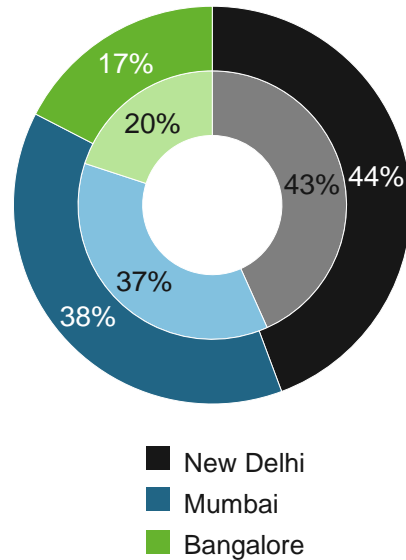
## Profile of AC segments

% AC | % Non-AC

By gender (1)



By region (1)



Outer ring: Indian ACs  
Inner ring: Indian non-ACs

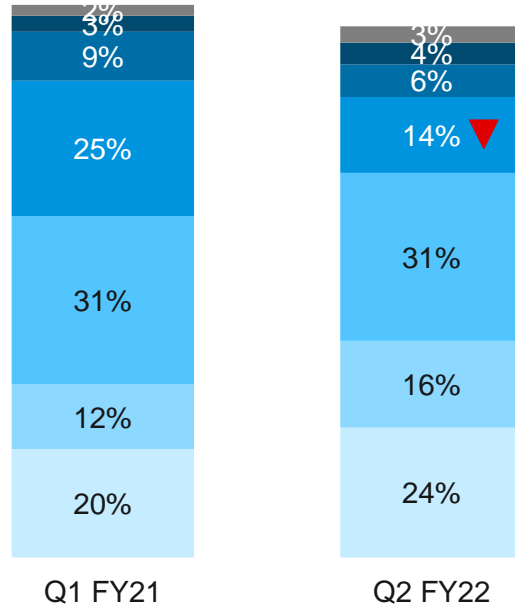
▲ ▼ Significantly higher / lower than non-ACs at 95%

# Compared to Q1 FY21, there are less families with pre-school aged children within the AC base; working status of ACs remains unchanged, with majority working full time

## Type of households

% AC | Q2 FY22

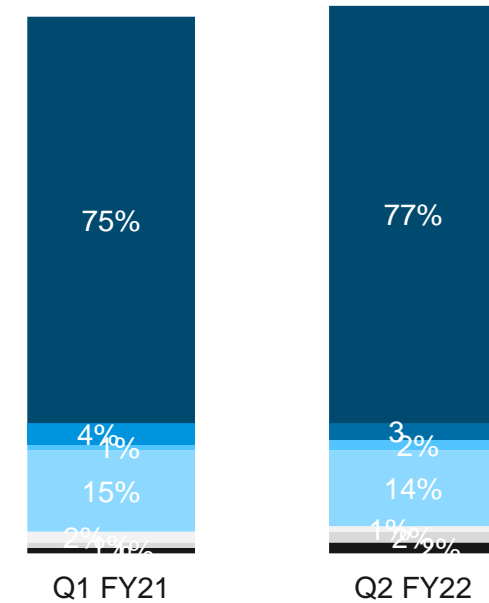
- Living alone
- Living with friends / flat mates
- Couple - no children
- Family with mainly pre-school children
- Family with mainly school-age children
- Family with mainly independent children
- Living at home with my parents



## Working status

% AC | Q2 FY22

- Working full time
- Working part time
- Casual worker
- Home-maker
- Self-employed
- Not currently employed, seeking work
- Not currently employed, not seeking work
- Student



▲ Significantly higher / lower than Q1 FY21 at 95%

