



Queen Charlotte Track,
Marlborough



**100% PURE
NEW ZEALAND**

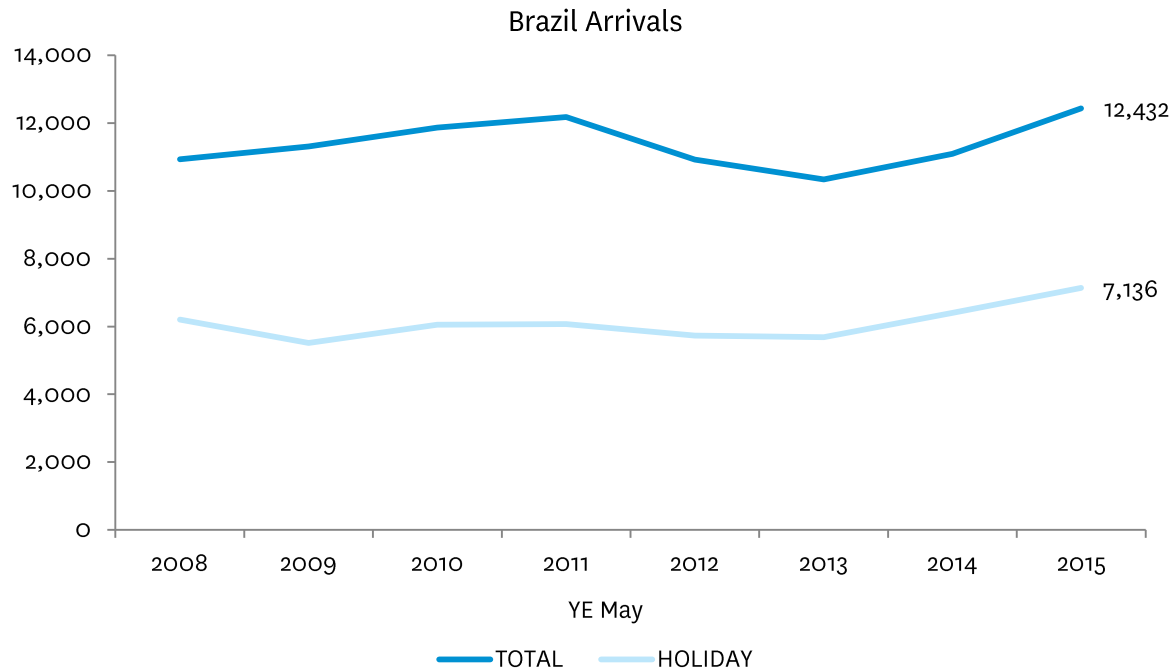
newzealand.com

Brazil Dashboard

July 2015

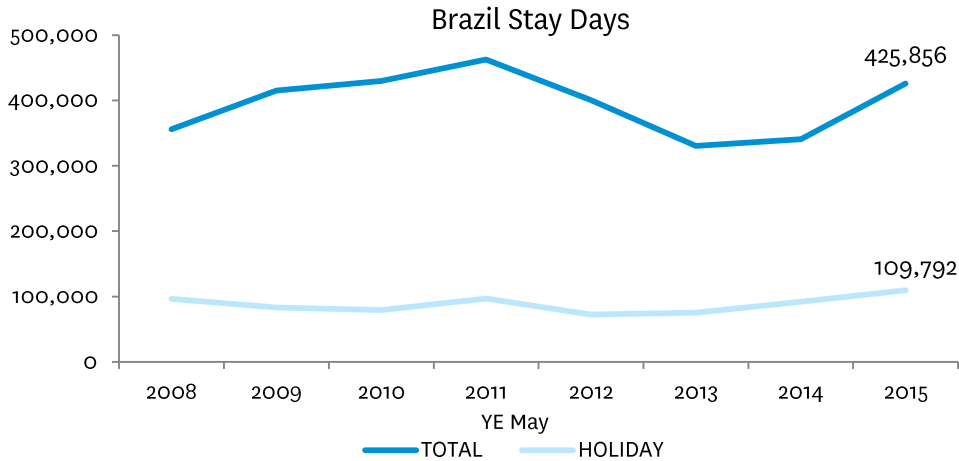
Brazil arrivals

YE May 2015	Holiday	Visit Friends/Family	Education	Business/Convention	Other/Unspecified
Arrivals	7,136	1,536	2,096	512	1152
% of Total Arrivals	57%	12%	17%	4%	9%

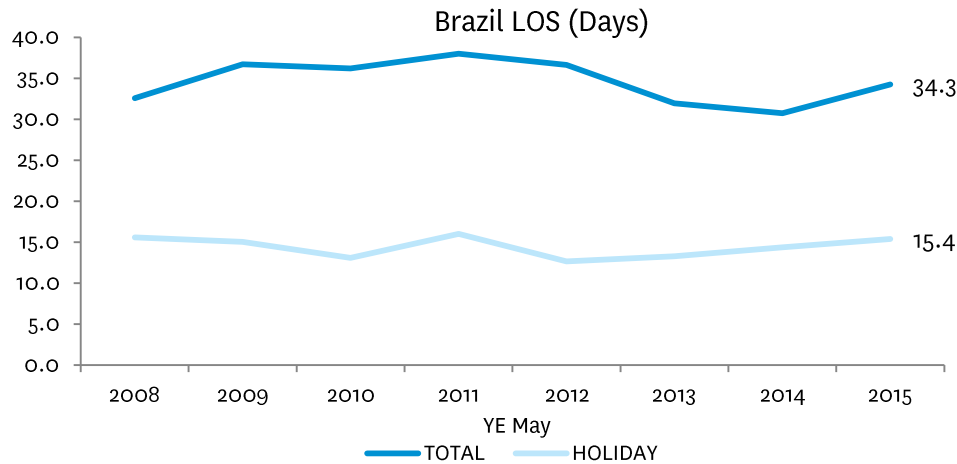


Brazil Arrivals		
	YE May 15	% Change vs. LY
Total	12,432	12.1%
Holiday	7,136	11.5%

Brazil - Stay days and Average length of stay



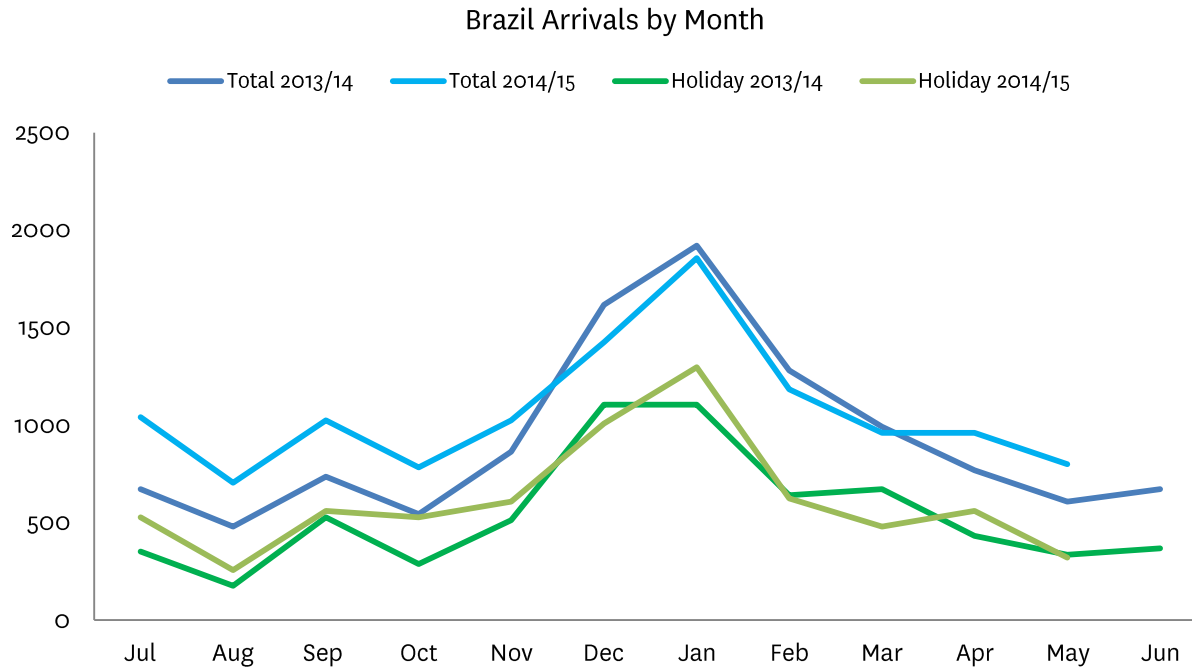
Brazil Stay Days		
	YE May 15	% Change vs. LY
Total	425,856	24.9%
Holiday	109,792	19.5%



Brazil Length of Stay		
	YE May 15	% Change vs. LY
Total	34.3	11.4%
Holiday	15.4	7.1%

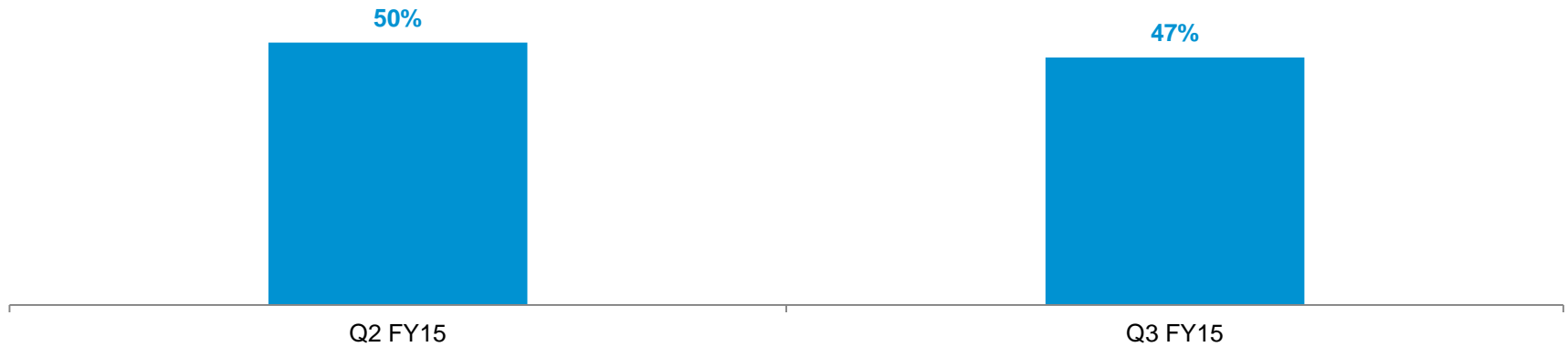
Brazil - Arrivals by month

Total and Holiday Arrivals



Brazil – Preference trend

Source: Emerging Markets Monitor, Total ACs, 1MRA⁽¹⁾





NOTES:

1. Data collected for all Brazil in Dec 14 and Feb 15

Brazil – Brand positioning

Source: Emerging Markets Monitor, T. Active Considerers %

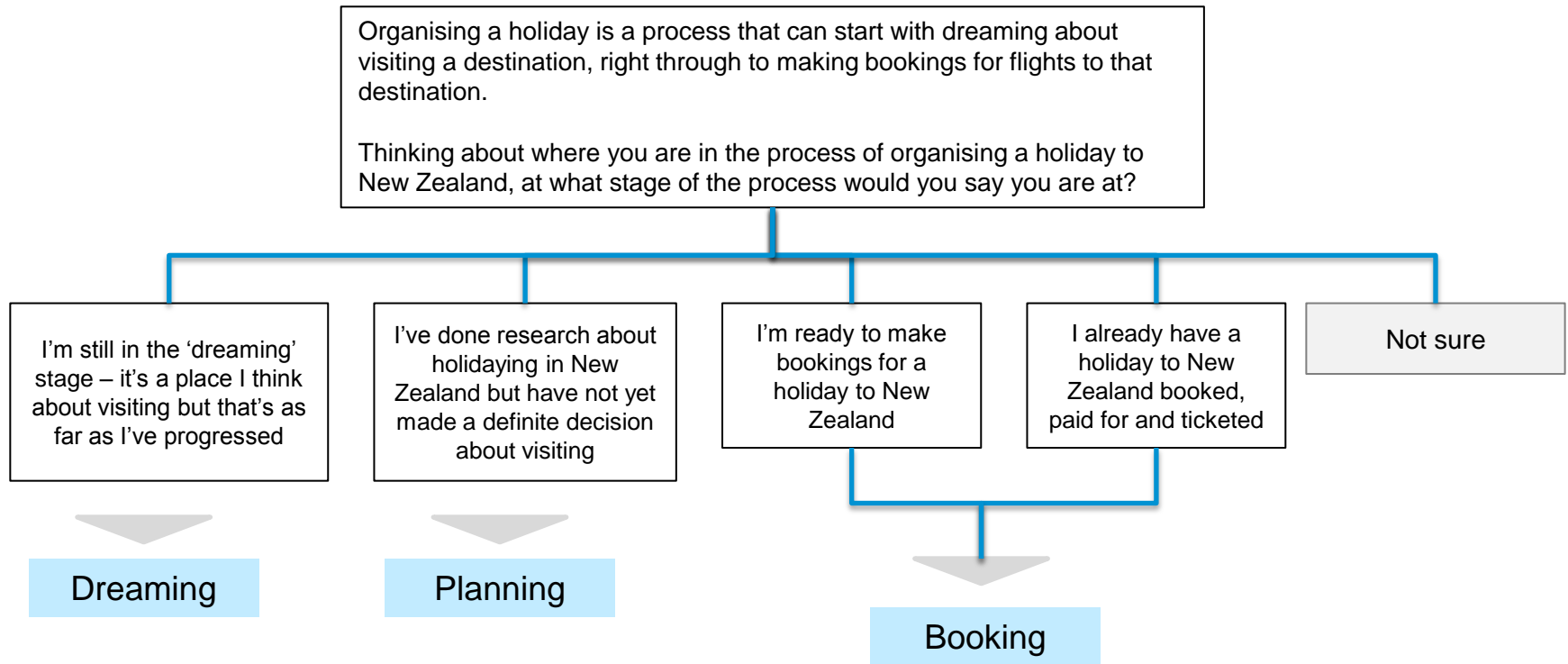
	Total ACs		
	Q2FY15	Q3FY15	Change
Global preference drivers			
Landscapes & scenery	72%	70%	-3%
Friendly people	59%	56%	-2%
Relax & refresh	64%	58%	-6%
Fun & enjoyment	62%	60%	-2%
Comfortable	66%	66%	0%
Clean & unpolluted	63%	60%	-3%
Brand specific attributes			
Easy to travel around	50%	39% ▼	-11%
Unique experiences	67%	64%	-3%

  Significantly higher / lower than Q2 FY15 at 95% confidence

Visitor consideration funnel

Visitor Consideration Funnel

We asked one question to determine where someone is in the visitor consideration funnel ...⁽¹⁾

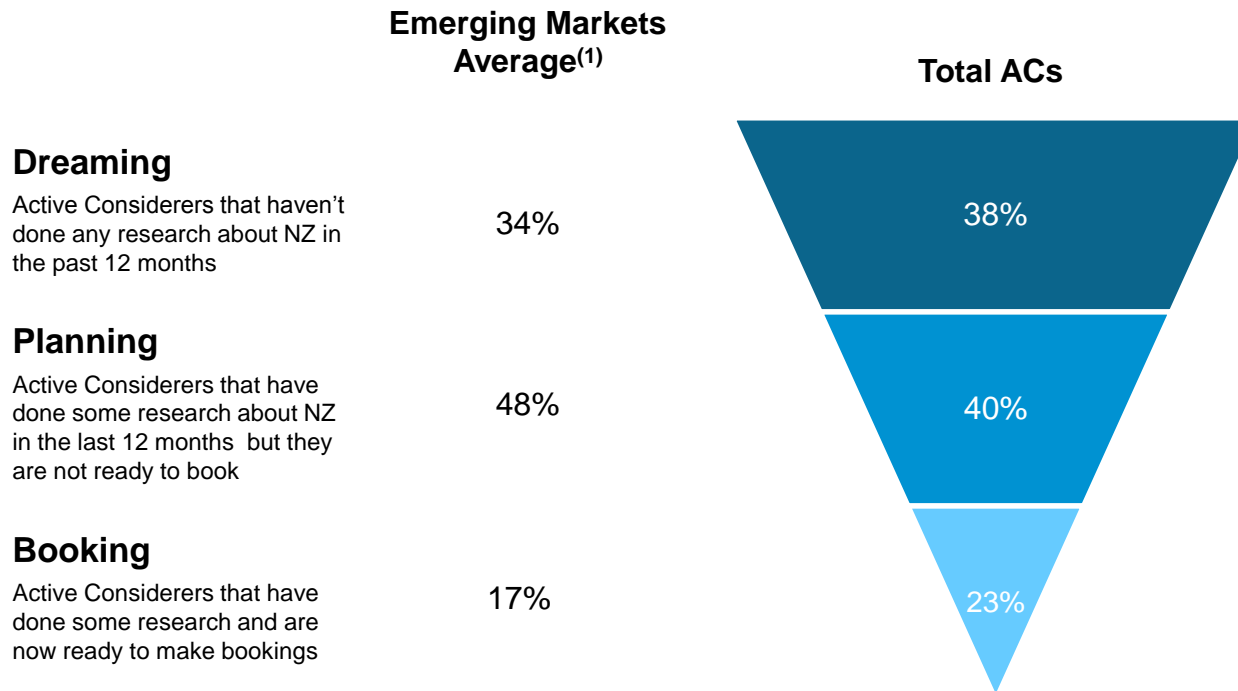


NOTES:

1. Will be asked as two questions for FY16 to align with the Key Markets AC Monitor

Brazil - Visitor consideration funnel

Source: Emerging Markets Monitor, %, Feb-15



NOTES:

1. A simple average of total ACs across the three emerging markets

Brazil – Constraints when planning a holiday to New Zealand

Source: Emerging Markets Monitor, %, Feb-15

Total Active Considerers (ACs), by visitor consideration funnel

Top 10 constraints	Dreaming	Planning	Booking
How easy is it to travel around?	57%	51%	36% ▼
How safe is it from crime?	50%	39%	45%
How safe is it to participate in adventure activities?	43%	49%	34%
Where should I get information about how to organise a holiday to NZ?	51%	39%	36%
What level of service can I expect from service providers?	42%	40%	35%
What and where are the recommended things to see and do?	43%	35%	31%
What is the length of time needed to experience NZ properly?	49% ▲	--	25% ▼
Is there a broad range of things to see and do?	55% ▲	37%	--
Does it get hot enough in summer?	46%	43%	--
How welcoming are the locals to tourists from my country?	50% ▲	--	--
Will I be able to buy the type of food I like to eat?	--	35%	33%
What are the shopping options like?	--	35%	--
Does it get too cold in winter?	--	--	30%
I'm concerned about driving on the left hand side of the road	--	--	29%

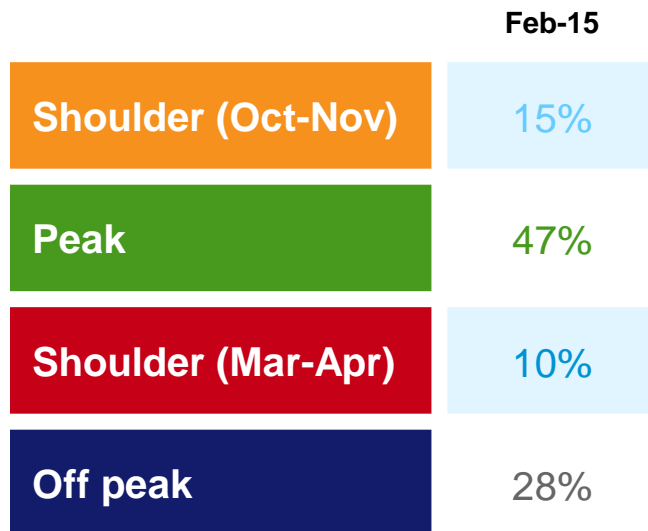
'--' Not a top 10 constraint for this part of the conversion funnel

▲ ▼ Significantly higher / lower than Total ACs at 95% confidence

The opportunity for shoulder season

Source: Emerging Markets Monitor, %, Feb-15

Targeting Brazilians for travel in the non-peak periods is feasible especially for our off-peak period



- Like New Zealand there is a long summer “holiday” period between early December through to February
- Additionally the month of July is a long break between school terms

Question: At what time of year would you ideally like to visit New Zealand? Please select the month in which you would intend to arrive.

Brazil – Top performing images

Source: Brazil Image Testing Dec 2014

Images with high 'Affective Impact' among Brazilian ACs⁽¹⁾



NOTES:

1. Affective Impact is a single measure score of the proportion of ACs that found the image to be (a) Novel: convey something better than expected, (b) Relevant: show something relevant to them, and (c) Affective: remind them of the things they care about. It is a communications measure proven to positively correlate with desire for the advertised brand.