



Queen Charlotte Track,
Marlborough



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Indonesia Dashboard

July 2015

Indonesia arrivals

YE May 2015	Holiday	Visit Friends/Family	Education	Business/Convention	Other/Unspecified
Arrivals	10,448	2,080	336	912	1536
% of Total	68%	14%	2%	6%	10%

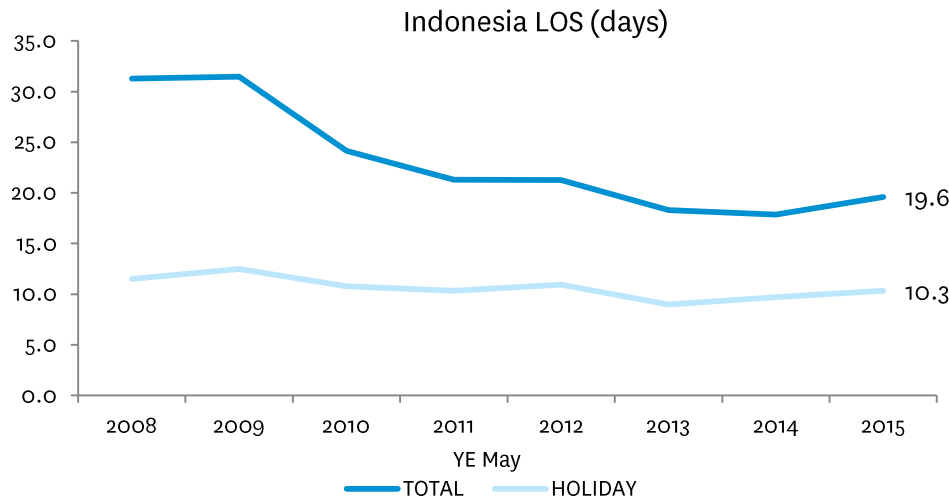


Indonesia arrivals		
	YE May 15	% Change vs. LY
Total	15,312	6.0%
Holiday	10,448	12.6%

Indonesia - stay days and average length of stay (LOS)



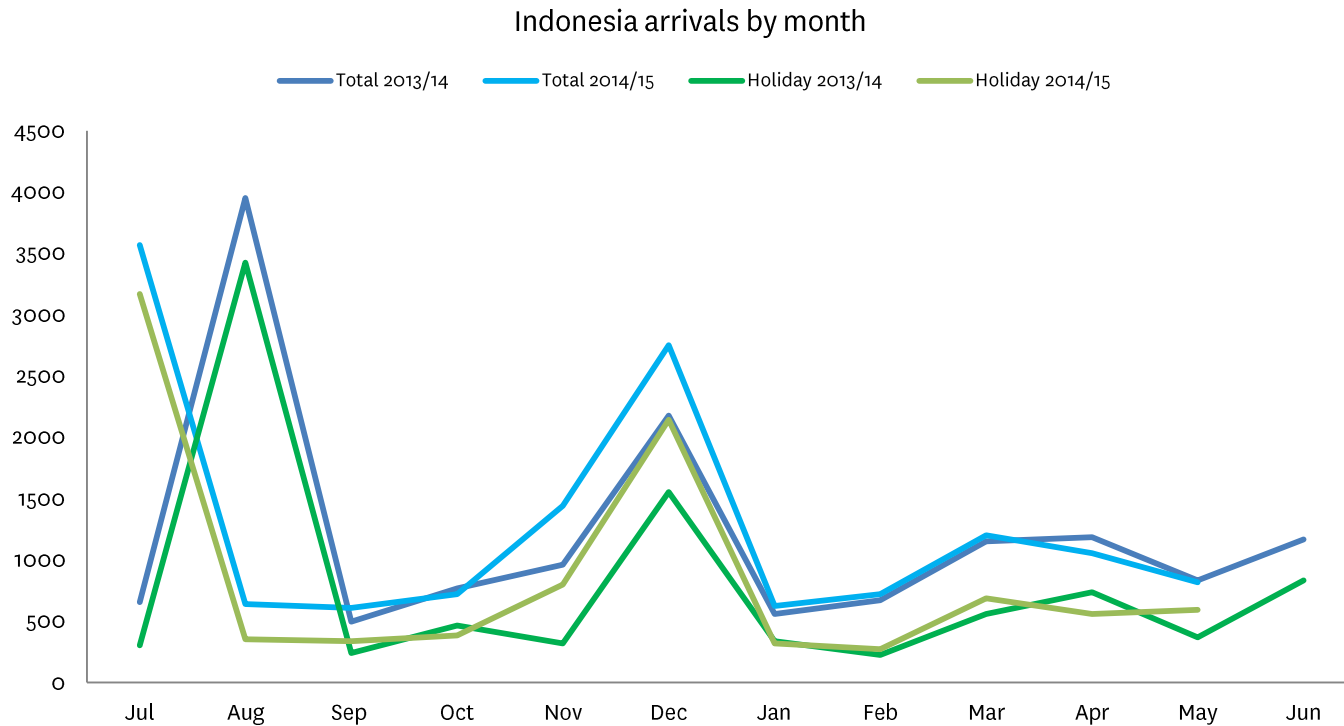
Indonesia stay days		
	YE May 15	% Change vs. LY
Total	300,272	16.3%
Holiday	108,032	19.9%



Indonesia length of stay		
	YE May 15	% Change vs. LY
Total	19.6	9.8%
Holiday	10.3	6.5%

Indonesia - arrivals by month

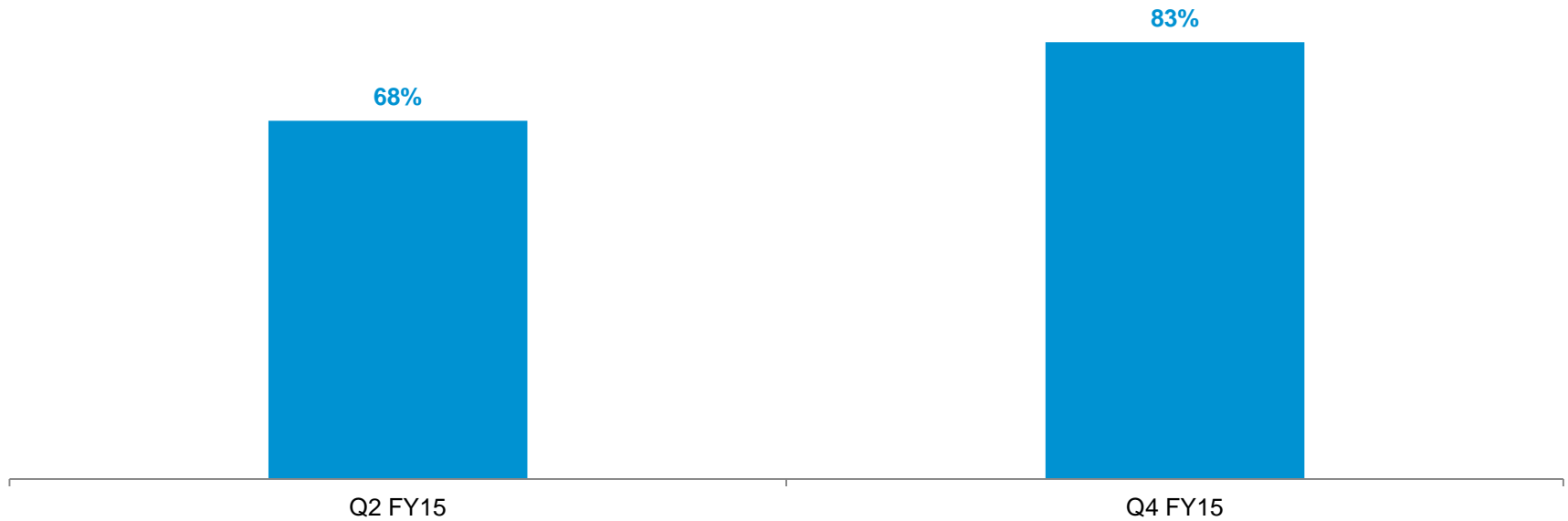
Total and holiday arrivals



Travel peaks in July / August fall in line with Lebaran holiday period which moves each year

Indonesia – preference trend

Source: Emerging Markets Monitor Indonesia, T.Active Considerers (ACs), 1MRA⁽¹⁾



NOTES:

1. Data collected in Nov-Dec 14 and May 15

Indonesia – brand positioning

Source: Emerging Markets Monitor Indonesia, T.ACs, 2015

	Total ACs		
	Q2FY15	Q4FY15	Change
Global preference drivers			
Landscapes & scenery	74%	83% ▲	8%
Friendly people	65%	71%	6%
Relax & refresh	72%	81% ▲	10%
Fun & enjoyment	64%	69%	5%
Comfortable	65%	72% ▲	7%
Clean & unpolluted	70%	80% ▲	9%
Brand specific attributes			
Easy to travel around	59%	65%	6%
Unique experiences	69%	74%	5%

▲ ▼ Significantly higher / lower than Q2 FY15 at 95% confidence

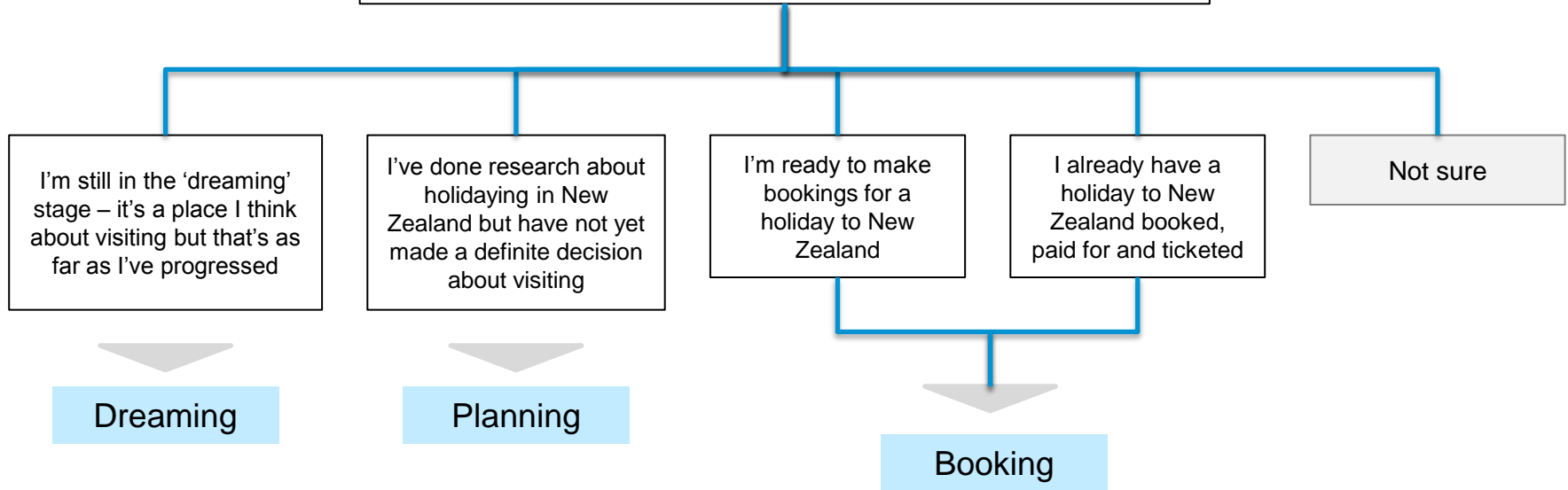
Visitor consideration funnel

Visitor consideration funnel

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

Organising a holiday is a process that can start with dreaming about visiting a destination, right through to making bookings for flights to that destination.

Thinking about where you are in the process of organising a holiday to New Zealand, at what stage of the process would you say you are at?

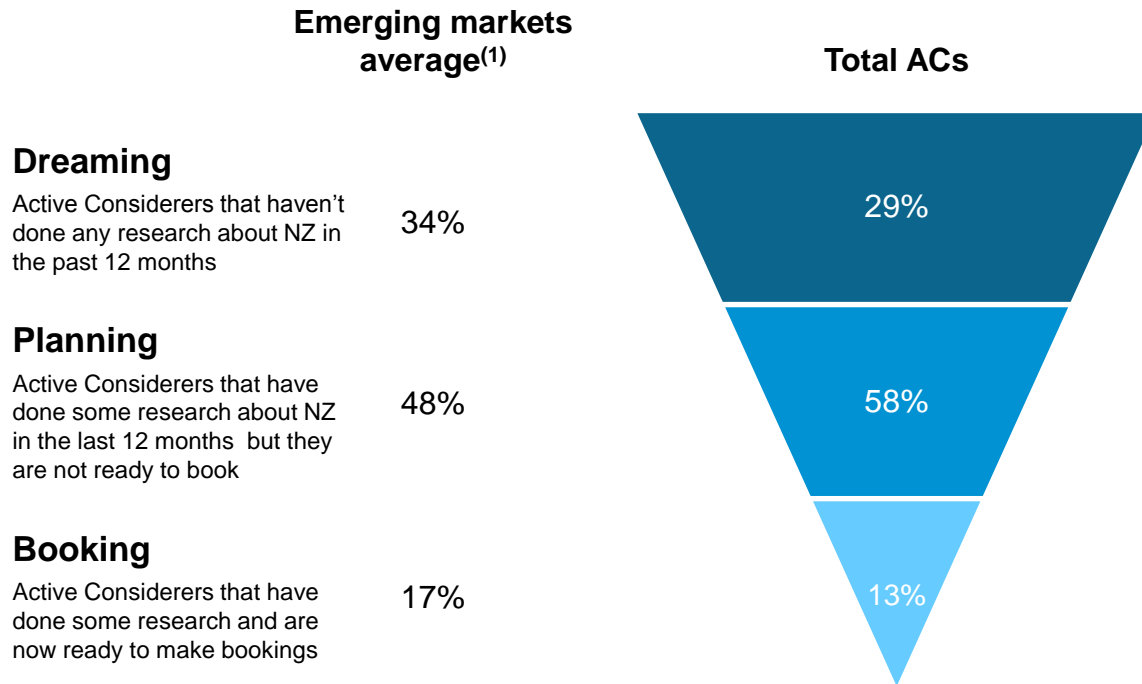


NOTES:

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

Indonesia - visitor consideration funnel

Source: Emerging Markets Monitor Indonesia, T.ACs%, May-15)



NOTES:

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

Indonesia – constraints when planning a holiday to New Zealand

Source: Emerging Markets Monitor Indonesia, T.ACs %, May-15

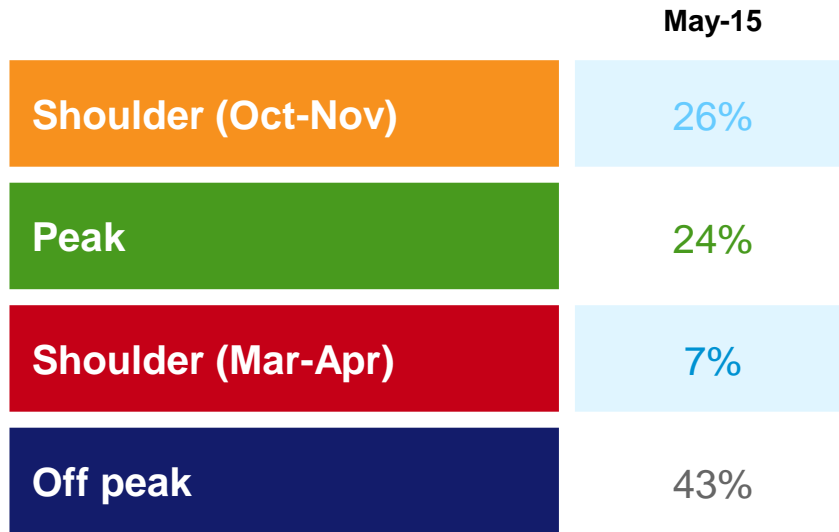
Top 10 constraints	Dreaming	Planning	Booking
How safe is it from crime?	51%	58%	67%
How welcoming are the locals to tourists from my country?	39%	47%	52%
How safe is it to participate in adventure activities?	37% ▼	52% ▲	48%
Is it suited to people of my age group?	43%	--	42%
How easy is it to travel around?	39%	52% ▲	--
Will I be able to buy the type of food I like to eat?	39%	45%	--
Does it get too cold winter?	38%	50% ▲	--
What / where the main cities are?	34%	--	--
The length of time required to fly to NZ	33%	--	42%
What level of service can I expect from service providers?	32% ▼	--	61% ▲
Where should I get information about how to organise a holiday to NZ?	--	42%	44%
What is the length of time needed to experience NZ properly?	--	47%	53%
What are the transportation options are for travelling within NZ?	--	47% ▲	--
How long does it take to travel between the main attractions?	--	51% ▲	58% ▲
The quality / conditions of main highways	--	--	43% ▲

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

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

There is a clear opportunity for the Oct-Nov shoulder as well as off peak

Source: Emerging Markets Monitor Indonesia, T.ACs %, May-15



The main school holidays happen from mid-June to mid-July, which is our off peak period

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.