



Waitangi

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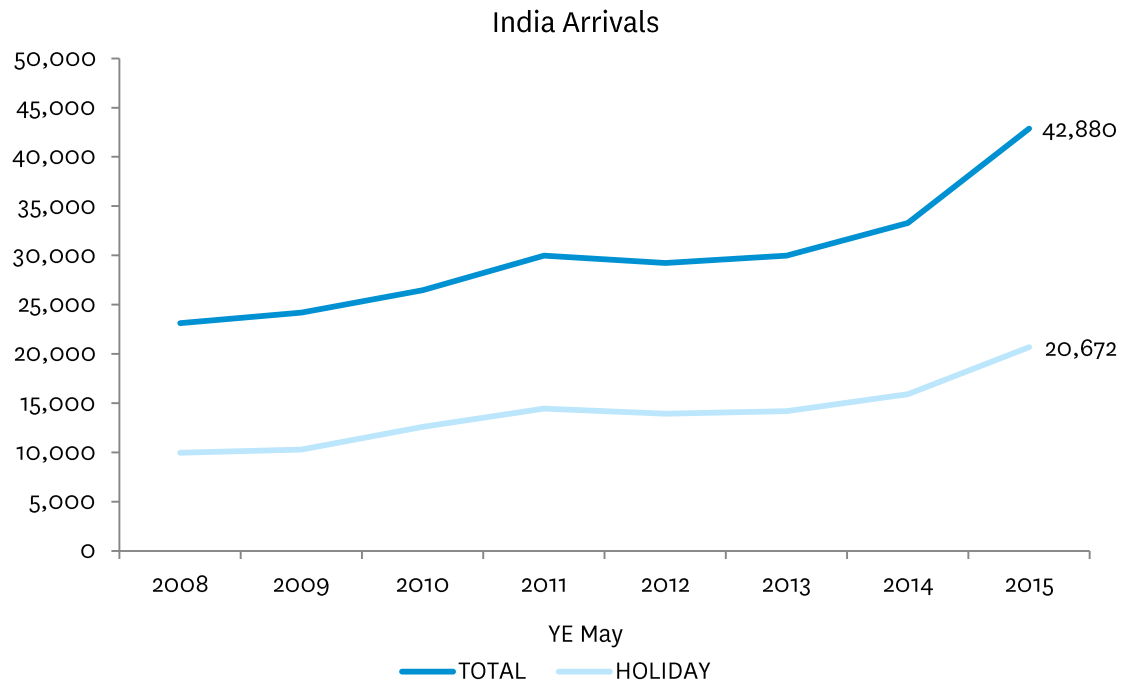


India Dashboard

July 2015

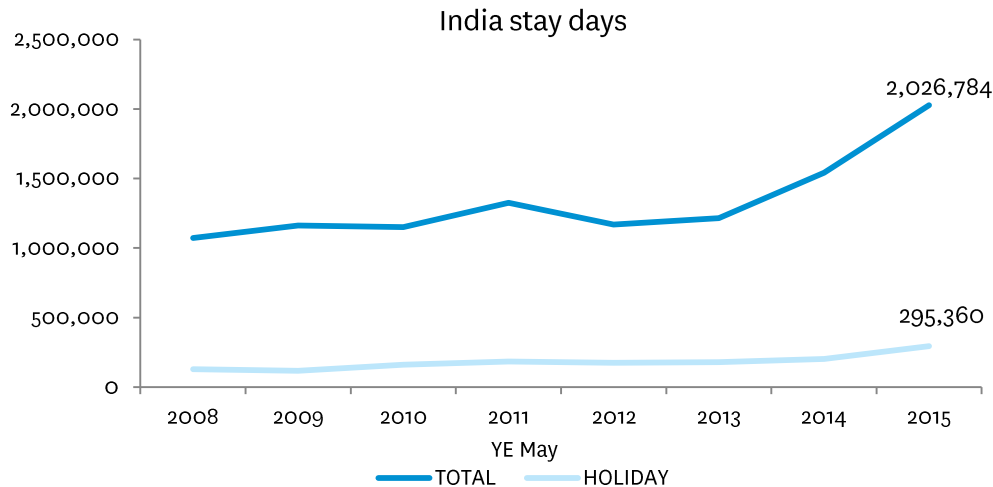
India arrivals

YE May 2015	Holiday	Visit Friends/Family	Education	Business/Convention	Other/Unspecified
Arrivals	20,672	12,496	1,776	3,184	4,752
% of Total	48%	29%	4%	7%	11%

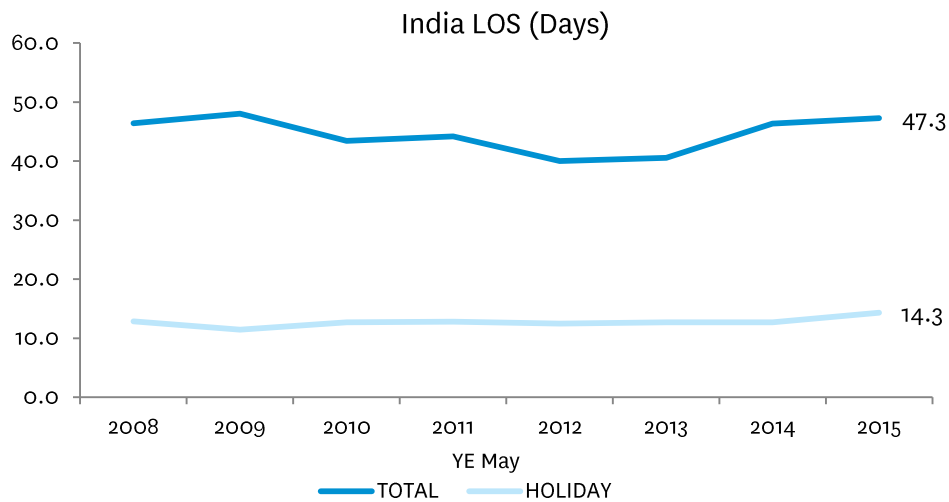


India arrivals		
	YE May 15	% Change vs. LY
Total	42,880	6.0%
Holiday	20,672	12.6%

India - Stay days and Average length of stay



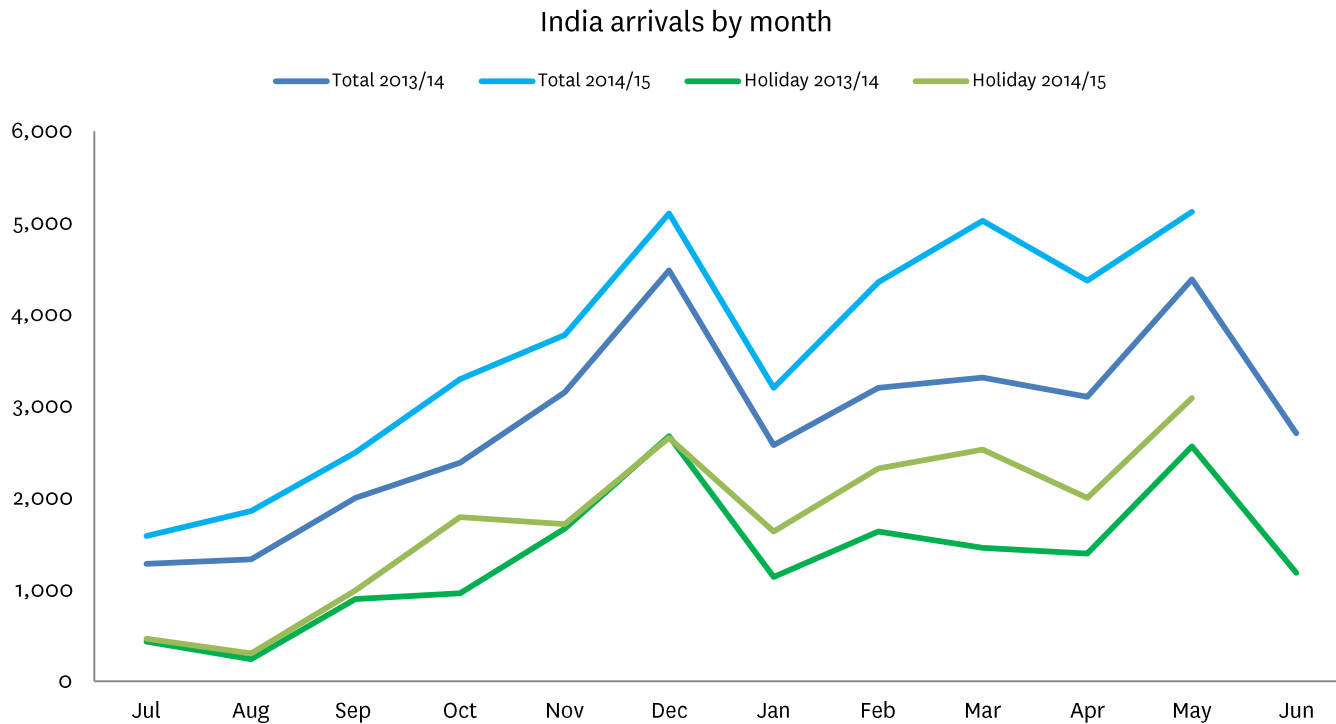
India stay days		
	YE May 15	% Change vs. LY
Total	2,026,784	31.4%
Holiday	295,360	46.6%



India - Length of stay		
	YE May 15	% Change vs. LY
Total	47.3	2.0%
Holiday	14.3	12.6%

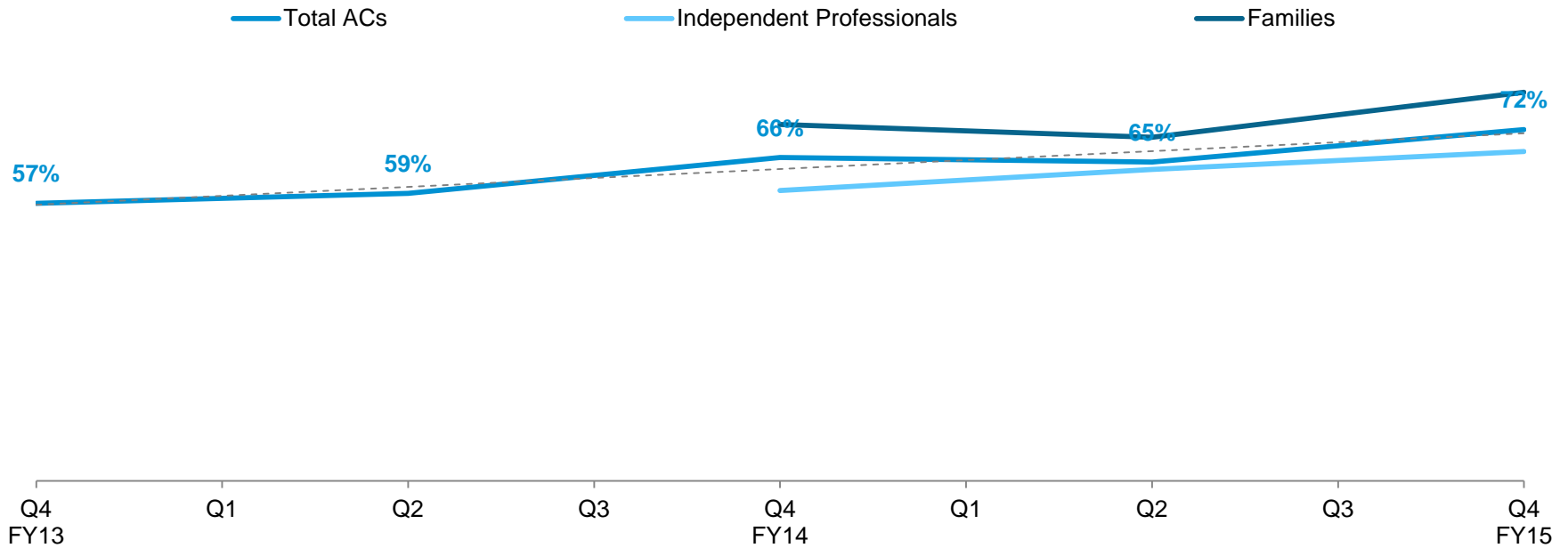
India arrivals by month

Total and holiday arrivals



India – Preference trend

Emerging Markets Monitor, 1MRA⁽¹⁾⁽²⁾ Total ACs and priority segments





NOTES:

1. Data collected in May 13, Dec 13, Apr 14, Nov 14 and Apr 15
2. Segments available from Q4 FY14

India – Brand positioning

Source: Emerging Markets Monitor India 2014-2015, T.Active Considerers (ACs)

	Total ACs			Independent professionals			Families		
	Q4FY14	Q4FY15	Change	Q4FY14	Q4FY15	Change	Q4FY14	Q4FY15	Change
Global preference drivers									
Landscapes & scenery	63%	60%	-2%	57%	56%	-2%	74%	65%	-9%
Friendly people	58%	53%	-6%	64%	48%	-16%	57%	59%	3%
Relax & refresh	52%	64%	12%	40%	63%	22%	67%	68%	1%
Fun & enjoyment	61%	58%	-3%	59%	57%	-2%	66%	61%	-5%
Comfortable	56%	52%	-3%	49%	49%	0%	63%	57%	-5%
Clean & unpolluted	66%	61%	-5%	62%	55%	-7%	72%	68%	-4%
Brand specific attributes									
Easy to travel around	54%	53%	-1%	49%	50%	1%	53%	57%	4%
Unique experiences	57%	51%	-6%	59%	48%	-11%	52%	58%	6%

  Significantly higher / lower than Q4 FY14 at 95% confidence

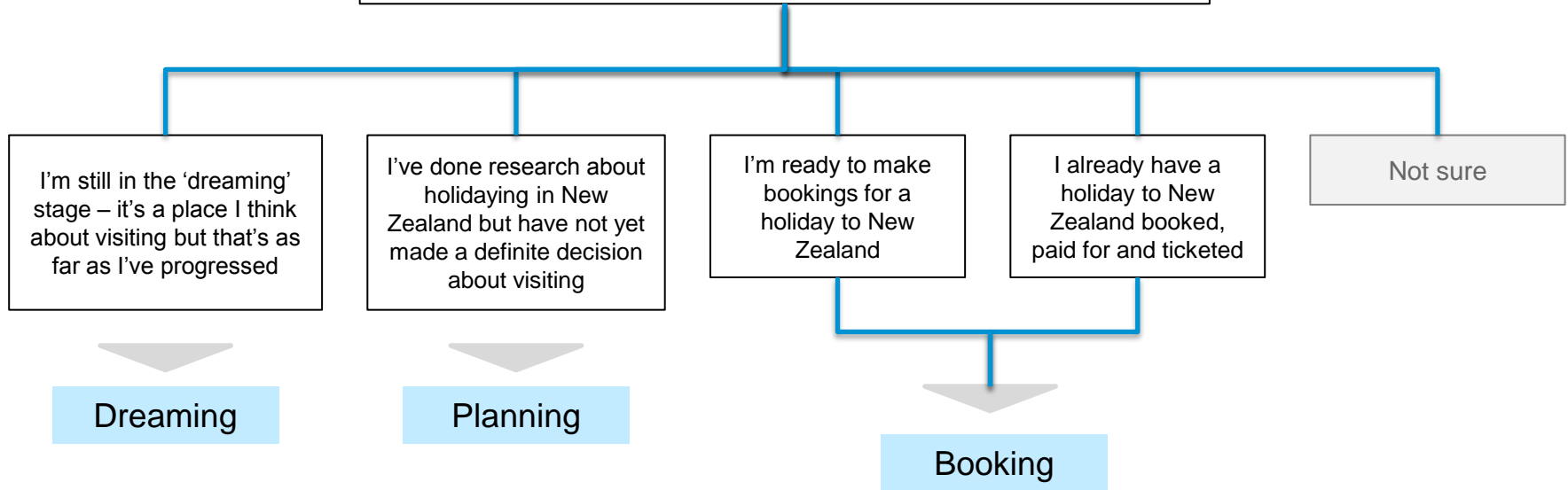
Visitor consideration funnel

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?

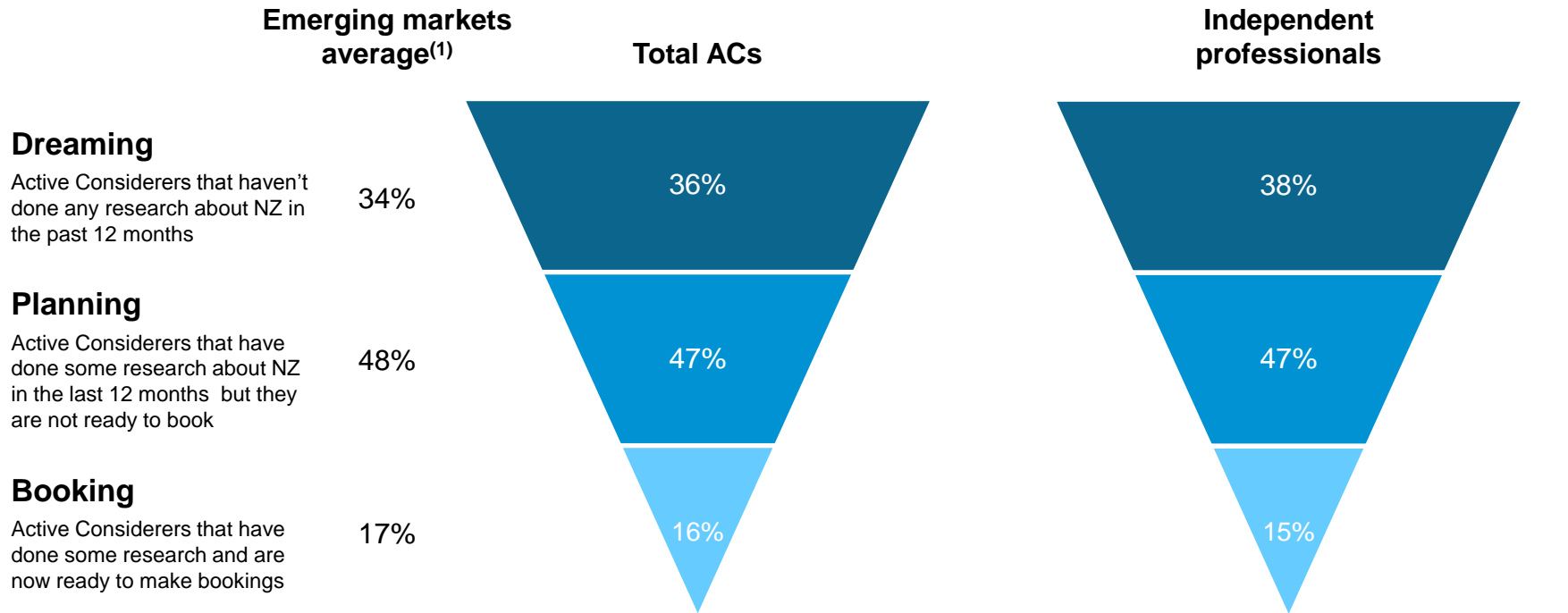


NOTES:

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



India - Visitor consideration funnel

Source: Emerging Markets Monitor India, %, Apr-15



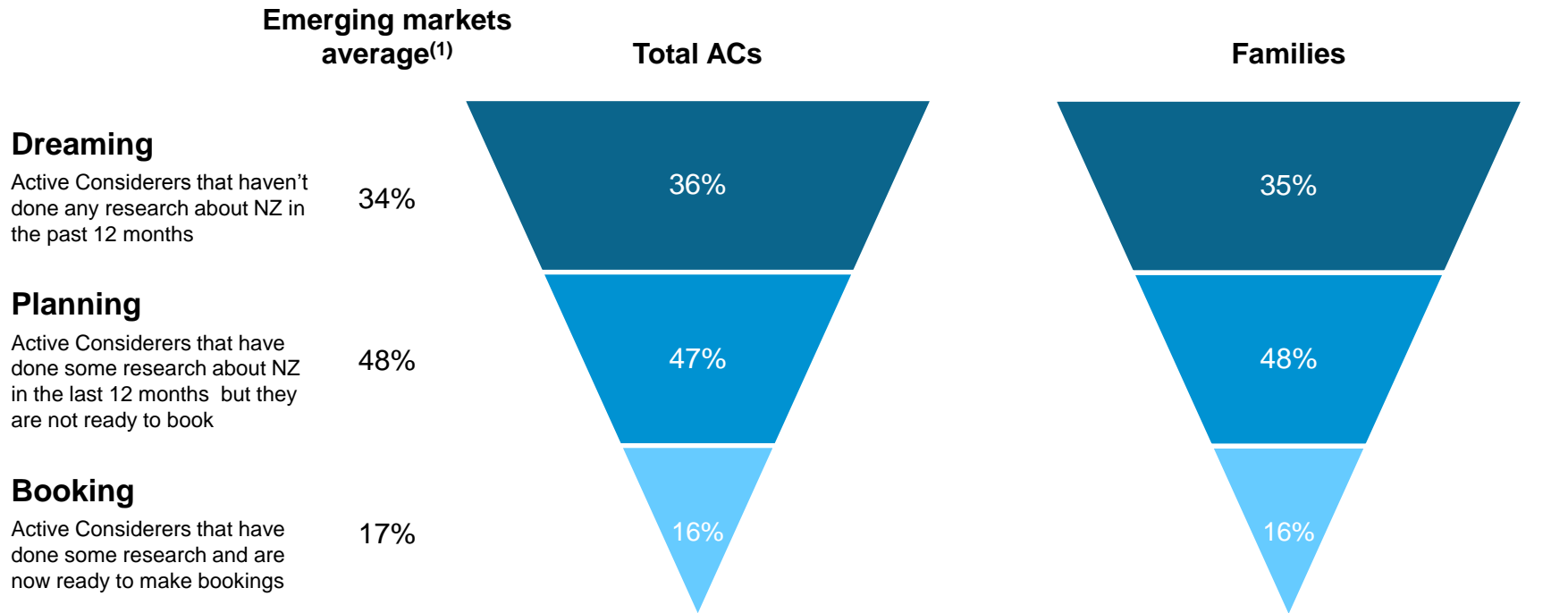
NOTES:

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

  Significantly higher / lower than Total ACs at 95% confidence

India - Visitor consideration funnel

Source: Emerging Markets Monitor India, %, Apr-15



NOTES:

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

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

India – Constraints when planning a holiday to New Zealand

Source: Emerging Markets Monitor India, T.ACs %, Apr-15

Top 10 constraints	Dreaming	Planning	Booking
What is the length of time needed to experience NZ properly?	59% ▲	43% ▼	60%
How safe is it from crime?	47%	40%	57% ▲
How easy is it to travel around?	44%	47%	47%
How long does it take to travel between the main attractions?	44%	38%	50%
How safe is it to participate in adventure activities?	48%	56%	50%
How welcoming are the locals to tourists from my country?	41%	44%	46%
Where should I get information about how to organise a holiday to NZ?	47% ▲	--	--
What level of service can I expect from service providers?	46% ▲	--	--
How often does it rain?	42%	47% ▲	--
Will I be able to buy the type of food I like to eat?	41%	--	--
Is there a broad variety of things to see and do?	--	46%	--
What is the nightlife like?	--	36%	61% ▲
Does it get cold enough in winter?	--	--	51% ▲
What are the transportation options are for travelling within NZ?	--	45%	48%
The length of time required to fly to NZ	--	--	46% ▲

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

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

India – Constraints when planning a holiday to New Zealand

Source: Emerging Markets Monitor India, T.ACs %, Apr-15

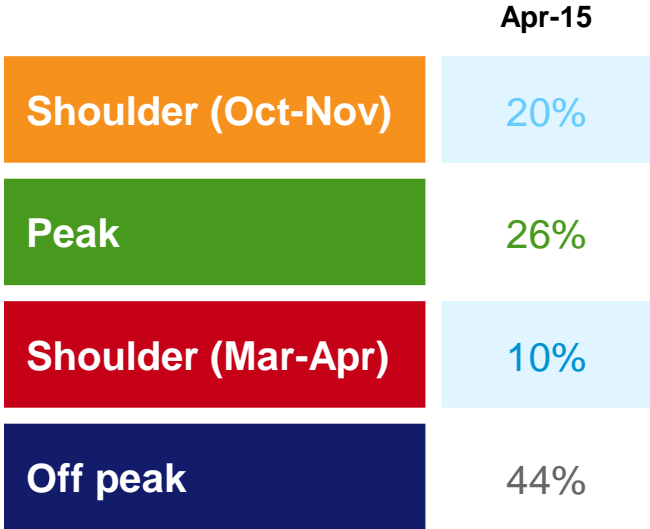
Top 10 constraints	Independent professionals	Families
How safe is it to participate in adventure activities?	57%	44%
What is the length of time needed to experience NZ properly?	45% ▲	57% ▼
How easy is it to travel around?	48% ▼	48%
How safe is it from crime?	44%	47%
How welcoming are the locals to tourists from my country?	42%	42%
How long does it take to travel between the main attractions?	43%	43%
Is there a broad variety of things to see and do?	49%	--
How often does it rain?	44% ▲	--
What is the nightlife like?	44%	--
Does it get cold enough in winter?	42%	--
What are the transportation options are for travelling within NZ?	-- ▲	41%
Will I be able to buy the type of food I like to eat?	--	45%
Where should I get information about how to organise a holiday to NZ?	--	42%
How well suited it is to people of my age group?	--	39% ▲

'--' Not a top 10 constraint for this segment

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

A clear opportunity for shoulder, and off peak for India

Source: Emerging Markets Monitor India, T.ACs %, Apr-15



The main school holidays in India are during the month of May, which is their summer holidays, this times nicely for 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.

Top images

