

USA

These packs provide a brief snapshot of our core visitor markets prior to the interruption of international travel due to Covid-19.

Whanganui River



**100% PURE
NEW ZEALAND**

USA

VISITOR SNAPSHOT



USA was New Zealand's 3rd largest market by arrivals, comprising 10% of total arrivals. American visitors spent \$1.53b in the past year, 13% of all visitor spend.

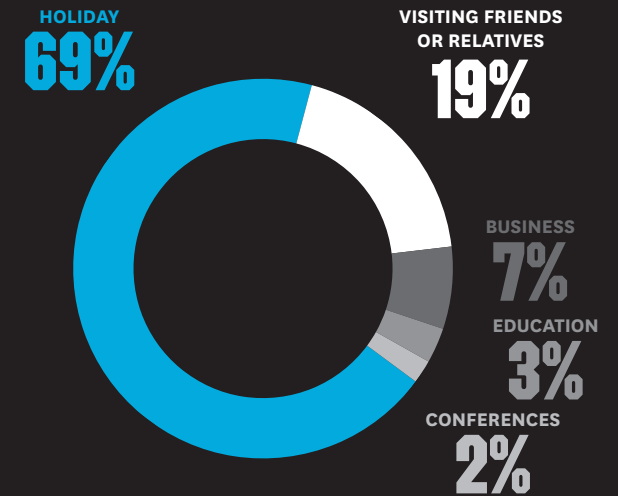
AVERAGE SPEND PER VISITOR



TOTAL MARKET CONTRIBUTION SPEND



PURPOSE OF VISIT



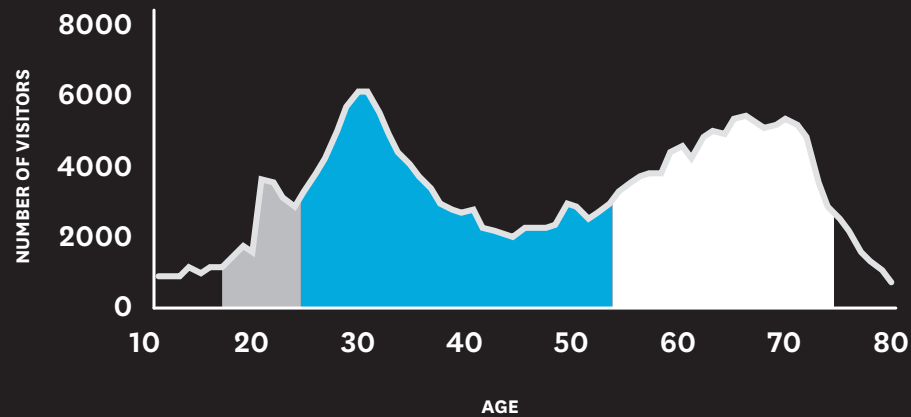
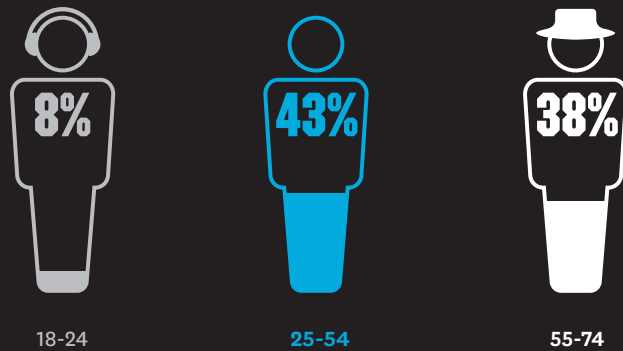
USA

VISITOR SNAPSHOT

43% of American holiday arrivals are aged 25-54

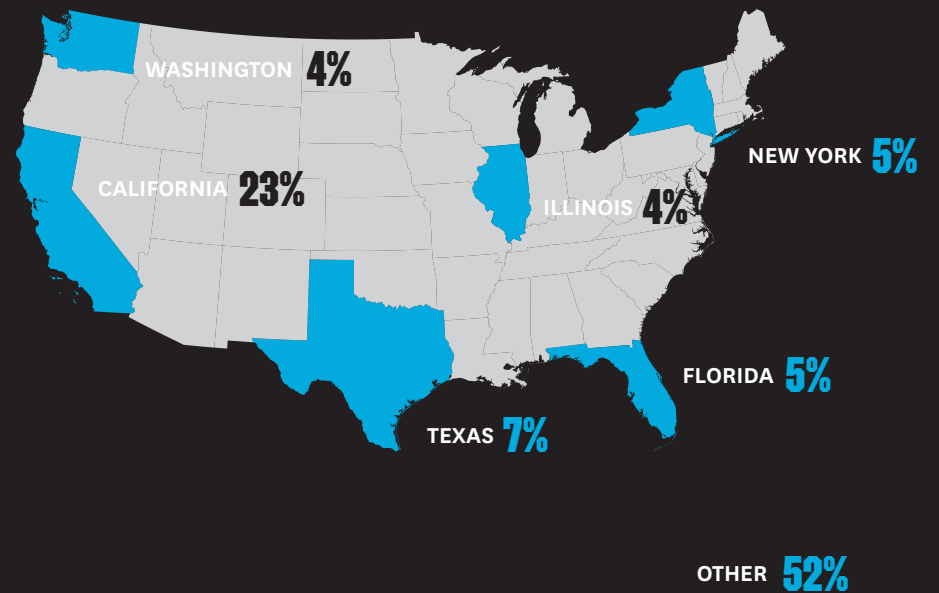


AGE PROFILE OF HOLIDAY VISITORS



Holiday arrivals come from all over the US, but almost 1/4 are from California

HOLIDAY ARRIVALS BY STATE



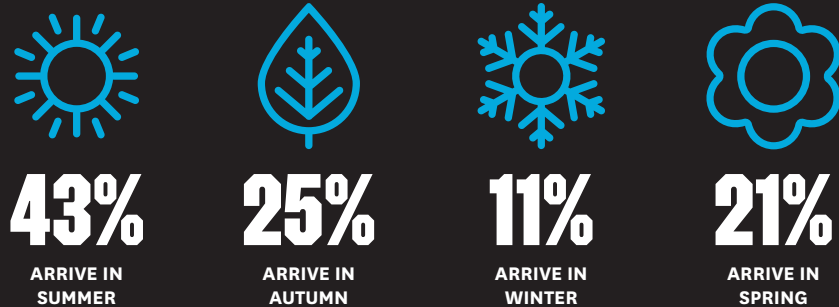
Age demographic is determined based on their age at time of travel
 Source: Stats NZ international visitor arrivals Feb 2020

USA

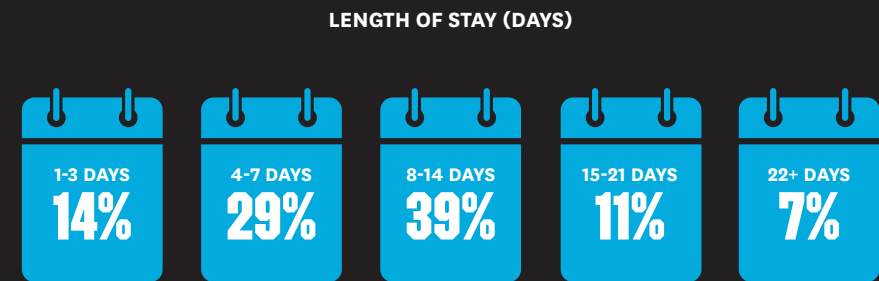
VISITOR ACTIVITIES



With some routes not operating all year, American holiday arrivals are skewed towards a summer holiday



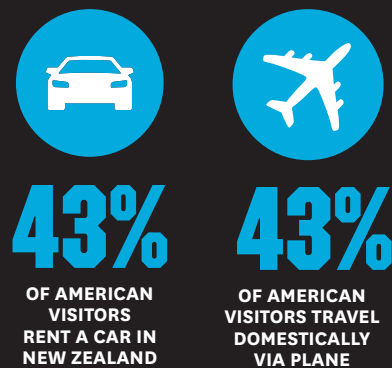
Visitors from the USA tend to stay in New Zealand for 2 weeks or less when on holiday



79% of holiday arrivals travels to Auckland Airport and 38% arrive via Australia

TOP TRAVEL ROUTES

ROUTE	% OF ARRIVALS
LOS ANGELES > AUCKLAND	18%
SAN FRANCISCO > AUCKLAND	15%
USA > SYDNEY > AUCKLAND	12%
USA > SYDNEY > QUEENSTOWN	7%
HONOLULU > AUCKLAND	6%
HOUSTON > AUCKLAND	5%
CHICAGO > AUCKLAND	3%



Popular Activities



Source: Stats NZ international visitor arrivals Feb 2020
MBIE International Visitor Survey December 2019

USA

ACTIVE CONSIDERER PROFILE



Active Considerers (ACs) are what we call our target audience. These people are aged 18-74, and have New Zealand as a preferred holiday destination in the next three years. They also indicate that they are prepared to spend US\$1,300 per person on their holiday.

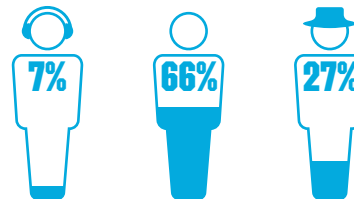
TOTAL ACTIVE CONSIDERERS

60.5M

APPROXIMATE NUMBER OF AMERICAN ACTIVE CONSIDERERS (DEC 2019)



AGE SEGMENT OF ACTIVE CONSIDERERS



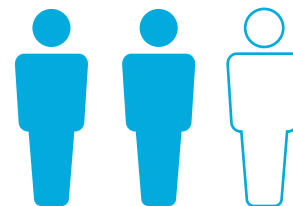
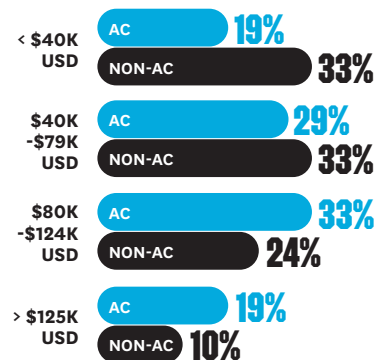
18-24 25-54 55-74

60% of ACs in USA are male

TERTIARY EDUCATION OF ACS (BACHELOR'S DEGREE OR HIGHER)



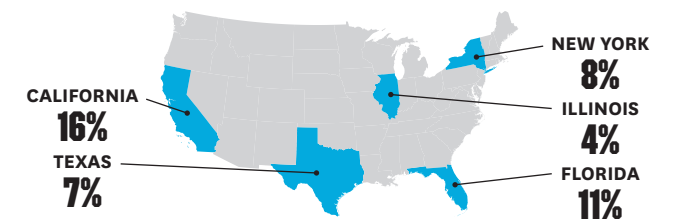
HOUSEHOLD INCOME SPREAD ACS VS NON-ACS



NEARLY 2/3 ACS IN THE USA ARE BETWEEN

25-54

STATE SPREAD OF ACS



Active considerer data is from the 6 month period ending April 2020

USA**ACTIVE CONSIDERER METRICS**

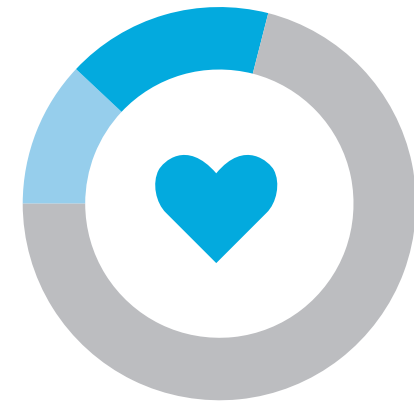
Appeal of NZ as a holiday destination has been steadily increasing over the last 12 months and this trend has continued during the Covid-19 pandemic. The prevalence of Active Considerers among the USA audience has remained steady over the last 6 months.

**56%**

ONLINE AUDIENCE 18-74 FIND
NEW ZEALAND APPEALING AS
A DESTINATION

**29%**

OF ONLINE AUDIENCE 18-74 ARE
ACTIVE CONSIDERERS

**58%**

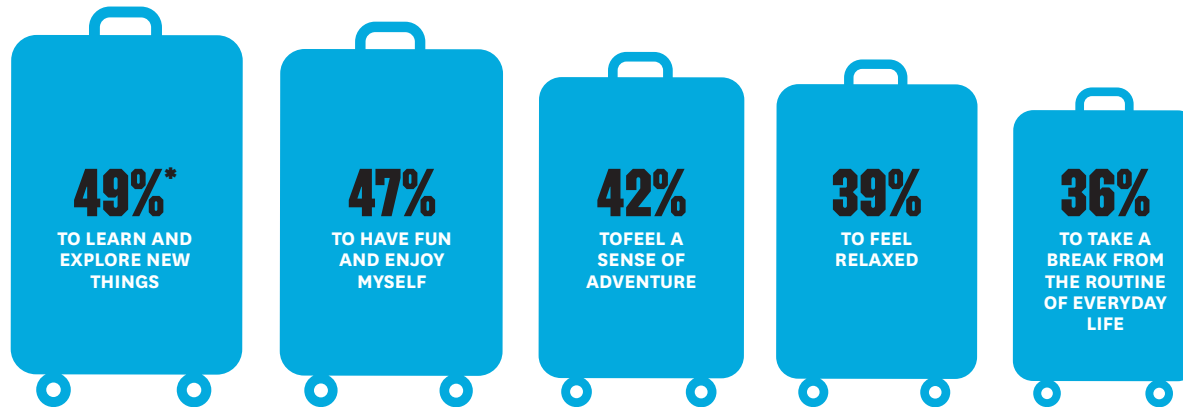
ACTIVE CONSIDERERS RANK
NEW ZEALAND #1 OR #2 AS A
PREFERRED DESTINATION

USA

ACTIVE CONSIDERER MINDSET

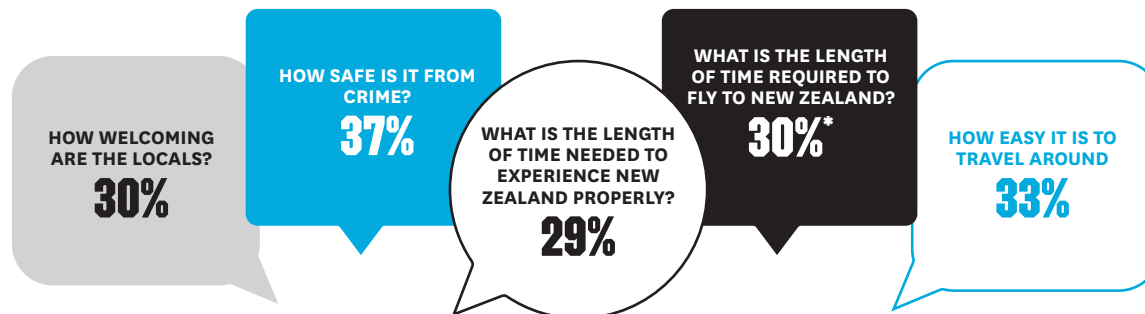


WHAT DO ACTIVE CONSIDERERS WANT FROM A HOLIDAY IN NEW ZEALAND?



*the 55-74 age group are the most interested in learning and exploring new things (66%)

WHAT DO THEY NEED MORE INFORMATION ABOUT?



*55-74 age group are the most concerned about flight travel time to NZ (43%)



Most often, Active Considerers are interested in trips with their partner or as a family with their children.



USA

DEMAND FOR NEW ZEALAND REMAINS STRONG, DESPITE COVID-19



59%

OF AMERICAN ACS HAVE AN IMPROVED PERCEPTION OF NEW ZEALAND

25%

OF US ACS EXPECT TO TRAVEL OVERSEAS MORE OFTEN AFTER COVID-19

SPEED OF NEW ZEALAND HOLIDAY DEMAND RECOVERY AFTER RESTRICTIONS ARE LIFTED

