



FORWARD

A | Auckland
Airport

China Market Development Qualitative research September 2014

High level summary Asia Summit 2015



Ministry of Business,
Innovation & Employment



Project objectives



Approach – Qualitative research

Proposition development

- **Workshop with key stakeholders** to ensure clear and differentiated propositions and communication approach
- Propositions developed/ tested: 'revitalization and rejuvenation', 'seasonality', 'close to nature', 'a land of contrasts'.

Qualitative research (NZ and China)

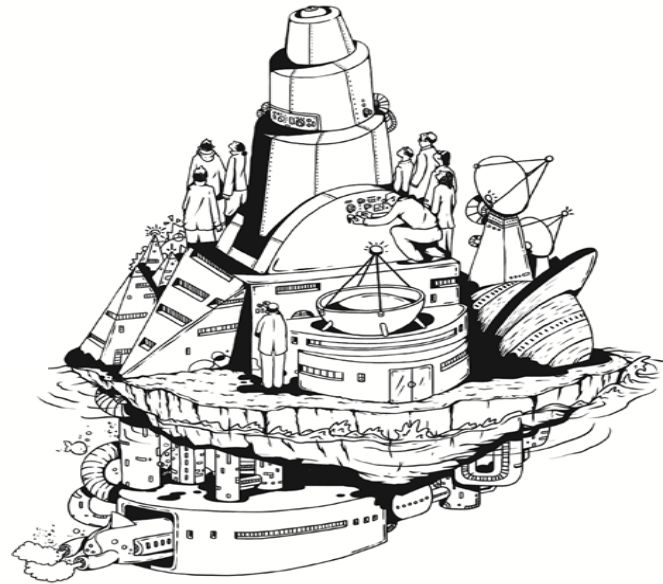
- **1 NZ exploratory group** – to test propositions and refine approach
- **5 in depth groups** in China with FIT (Free Independent Travellers) 'avid' travellers who have travelled:
 - Long haul out of Asia at least twice
 - Have travelled to destinations outside Asia primarily for reasons other than shopping
 - Are considering visiting New Zealand.



FORWARD



Understanding the needs of the Chinese FIT Active Considerer



Sophisticated, experienced, confident travellers




Chinese - The FIT Active considerer

- Travel is an **extremely important** part of life. planning, experiencing, sharing
- They **have had many different and varied travel experiences**
- **Confident to plan and book independently** all aspects of the trip - on line
- **Time rich** and will spend – within a (generous) budget
- **Do not require 5 star accommodation** – Will spend less here to spend more elsewhere - balancing the budget
- **Look for and appreciate deals** – from airfares, to add on experiences
- **Travel companions and fellow-planners are important** – planning, others reviews, travelling with others, sharing, connecting
- **Live their lives online & social media** – mostly via smartphones



Our ordinary is their extraordinary

New Zealand offers a highly relevant travel experience




**Place/
environment**

People


Experience

Take me away from....



- Polluted air, sky & food
- Urban intense living
- Man made environment

TO



- Nature - Dramatic, intense, impactful, unspoilt, protected
- Natural intensity of clean air & sky (blue)
- Clean and safe

- Open spaces with fewer people
- Welcoming, trust
- Different / contrasting lifestyles, people, cultures, history

- Easy
- Calm, relaxing
- Safe
- Stimulating

"We are in a crowded noisy city – I want something different"

6

Deals are important for all

Love of a deal does not mean they want the cheap option



Smart & clever

Can trigger a flight
Or purchase

Acknowledge their
importance and value

Feel good

Will pay for a
value
experience



中国柑桔

Mandarin information is accessed via digital and apps

It is important to be there

- Or have mandarin language hand outs
- Or Use visual representation

English is stronger among the younger

Time rich



The Chinese FIT active consider is generally **time rich** and they plan to travel for **10 days to 3 months – mostly 2 to 3 weeks**.

“7-10 days for local Asia and 2 – 3 weeks for long distance”

“I spent 3 months in Italy last year to understand Italy and the cuisine well – taste, see touch and understand why”

- Opportunity for **regional destination branding** and differentiation within the overall destination brand

They will **take time to see and experience one area well** rather than try to do it all and **will return to a destination** to build on an experience and try something they couldn't do on the first trip

“I will plan to go to the same place – but with a new route”

- Very important to **continue building relationships after travellers have left** – to consolidate the desire to return

They **do not want to be rushed**, feel pressured or have to do it all in one day. A relaxed pace with time to get to experiences, time to just sit and watch, and to *“live like the locals”*

- While multiple combined experiences may be good – they may not want to do them all on one day
- **Many activities will be booked at the last minute** of the day ahead. It must be easy to do this online or by phone

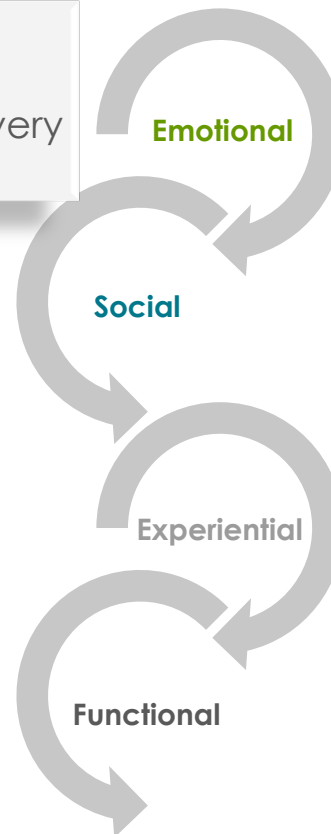
Travel needs for the Chinese FIT traveller



The travel experience is multi layered
Consider how to deliver this in every experience

- **Be there** and experience it for yourself
- **Stimulation** and challenge
- **Participation – get involved**
- **Doing** things you enjoy but are difficult to experience in China
- **Build knowledge** – learn and understand different ways of life

- **Scoping** for education, investment, emigration (housing, social welfare)



- **Escape** Freedom & expansion
- **Relaxation** – de-stress
- **Recharge** and renew
- **Stimulation**
- **Connection** with others
- **Ease** – nothing difficult or hard

- **Social Confidence** Social image– “show your tastes”
- **Conversation** topic
- **Friendships** and relationships
- **Enjoyment**, fun,
- **Sharing** experience with friends and family



FORWARD

The Unique and Compelling New Zealand Proposition



The appeal of Nature



"I want to melt into nature" *"I want to personally feel it – see if its true – be there"*

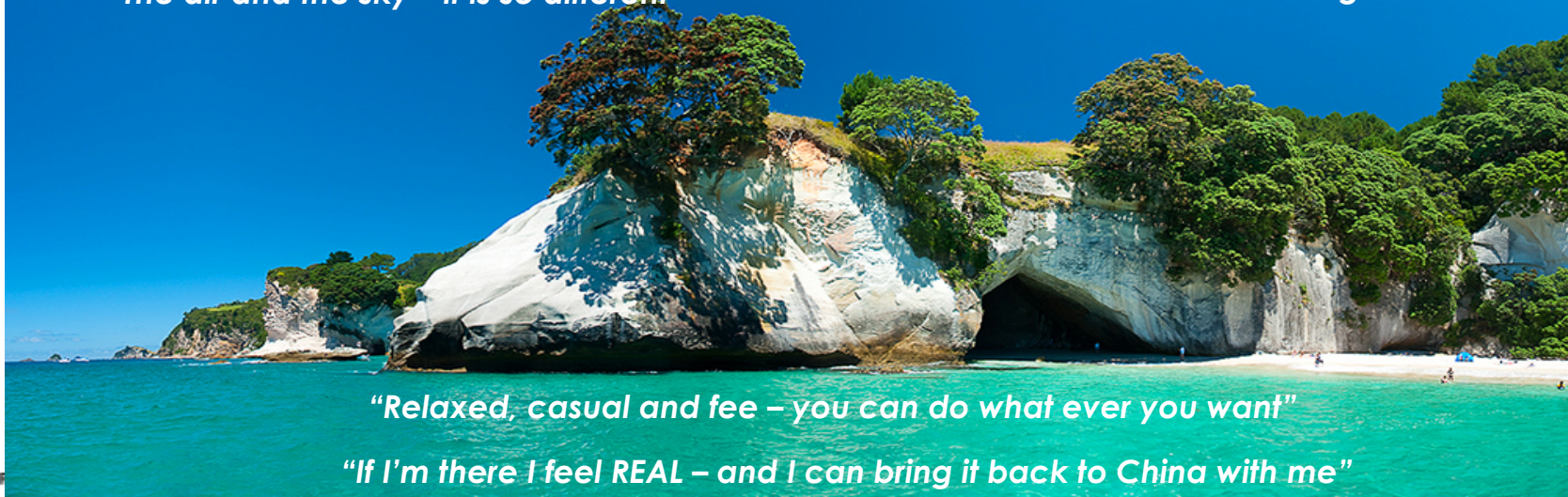
"I want to explore an untouched land"

"Pure nature – like 100 years ago – the original way"

"Be free"

"The air and the sky – it is so different"

"What is beautiful – I want to go there"



With the need for intensity & others



There needs to be a sense of intensity and other people

don't just represent solitude when promoting New Zealand



“If I am on my own I feel like a ghost”

Nature alone can be imagined as boring or lonely



New Zealand: Building interest to activation

A scenic landscape of New Zealand featuring snow-capped mountains, green fields, and a hot air balloon floating in the sky. The image is overlaid with a central diagram and text.

New Zealand 100% Pure

Activation =

FRESH VIBRANCE & INTENSITY
Of original untouched nature

PLACE
+
EXPERIENCE

ZERO DISTANCE immersion

As the sense of experience and connection grow then commitment to travel to New Zealand is achieved

Feel it, see it, touch it, do it, taste it, share it

New Zealand: Building interest to activation

A scenic background image of a New Zealand landscape with snow-capped mountains, a lake, and a tree in the foreground.

New Zealand 100% Pure

FRESH VIBRANCE

**ZERO DISTANCE
immersion**

DIVERSITY
Variety

Many
Different
Contrasting
Choices
Options
**Multi
layered**

INTENSITY

From
**beginning to
end**
**Multi layered
Involving
Stories &
experiences**

EASE
*Inclusive
Accessible
Serendipity*

Welcoming
*Open
Safe
Friendly
Responsive
flexible*

At all times of the year – 4 seasons



DRAMATIC INTENSITY

Experience and indulge in the intensity of the untouched

DIVERSITY
Variety

Many
Different
Contrasting
Choices
Options
Multi
layered



EASE
Inclusive
Accessible
Serendipity

Welcoming
Open
Safe
Friendly
Responsive
Flexible

Feel it, see it, touch it, do it, play it, share it

DRAMATIC INTENSITY

Experience and indulge in the intensity of the untouched

DIVERSITY
Variety

Many
Different
Contrasting
Choices
Options
Multi layered



**ZERO
DISTANCE
IMMERSION**



EASE
Inclusive
Accessible
Serendipity

Welcoming
Open
Safe
Friendly
Responsive
Flexible

Indulge in the drama of the worlds best, in the worlds most dramatic natural landscapes

*Multi layered
Involving
Stories & experiences*

Zero distance immersion: **Intensity**



Insight: At the source up close involved: *Feel it, see it, touch it, do it, taste it, share it*

Intensity is being in the moment, experiencing something your self

Sky diving, platform over a cliff, watching bungee jumping

Intensity is also multi layered experiences

- **Understanding the story** - why is this special, doing it, challenging yourself to step out of the comfort zone and take a challenge, try something new, do it with others, experiencing or watching.
- **There can be as much pleasure for some in watching** others and taking the photo as doing

Small experiences can also have a sense of intensity

- Listening to the birds in the morning, looking at the night sky, seeing a dramatic waterfall from a boat, Watching the sun rise or set, seeing the clean air, blue sky and white clouds

➤ **Implication IMAGERY:**

Close ups of people, people looking at the camera and having fun with the shot not just posing, adds to this sense of immediacy (selfie style)

Images: Direction



These images are taken from social media travel pages. They show a level of intensity and involvement, movement. There is often a relationship with the viewer – looking at or aware of the viewer. Many Chinese visitors have very good photography skills and the images are often arty or have an interesting perspective.

The image brief
Dramatic intensity
Creative artistic
Utilise light and angles to create noticeable interruptive images
Connected – People of the possibility of people are part of the image design

Zero distance immersion: **Diversity**



Insight: Diversity of different experiences delivers a great travel experience and also give lots of distinct, memorable and sharable stories

New Zealand is recognized and is appealing because of the many **very different landscapes, environments and experiences to be had relatively easily**

Don't have to do it all at once

➤ **Implication:**

CLUSTERING

- Work together to deliver great and multi layered experiences
- Share – information about other experiences
- top 10 Highlights or 'must do' are appealing and help navigation
- Develop regional clusters

Zero distance immersion: **Ease & accessibility**



Insight: Being able to have zero distance immersion experience easily is very desirable

It must be simple, easy – with no stress or hard work.

“I want to sit in the boat and look up at the spectacular mountains

– I do not want to climb up the mountain – it is too hard”

Simple involvement activities as well as accessible more challenging ones

Serendipity – stumbling across unexpected delights,

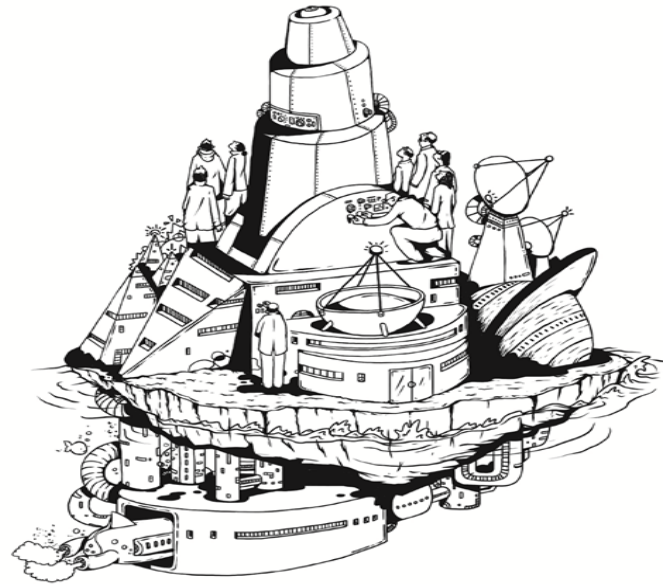
- They will purposefully not plan everything to allow this to happen: **Communicate** - views, activities, accommodation, events, experiences, signposts and posters, have rest stops to enjoy the view, have an app with up to date highlights, events, interesting facts and information, with location and cost details

Take people to the experience bus, train, helicopter, van, boat, buggy – and they will pay

Enable discovery – Digital, signage, top 10... must do...., RTO Chinese language info



Understanding the NZ Food & Beverage Opportunity





**New Zealand
100% Pure**

Taste New Zealand

New Fresh
The very best natural ingredients in the world from source

Zero distance immersion
End to end experience
Hands on

Diversity
Many different experiences and choices
Unique, local specialties
Easily available

The actual produce is key

Feel it, see it, touch it, do it, taste it, share it
TRY IT

Food – The current experience



What NZ is most well regarded for is
NEW FRESH produce from this 100% pure, untouched country

Seafood and food-at-source

Zero Distance immersion experience – with any type of fresh food in a variety of appealing contexts, and seasons

Wine experiences from source

Food and education is also an attractive ‘petite bourgeoisie’ experience

Stand out food experiences will be planned for, if they are known about – a must do.

Food is a multi sensory experience

Building layers into the experience adds depth, meaning and enjoyment to the experience

- **The back story** Why is this special, famous, rare, limited, new, seasonal, unique
- **The source** Where is it from – can I see and experience this
- **The environment** The specialness of eating in great places
- **The people** Who I am with and the local people I meet
- **The experience** *Feel it, see it, touch it, do it, taste it, share it TRY IT*

Regional food opportunity

Real interest in regional differences and specialities – *must do* while here

- Adds a sense of layered experience
- Creates a focus for itinerary planning and the possibility of different trips to New Zealand
- Can tell the story to friends and family better
- Builds on local availability and fresh produce – close to source

➤ **Implication:** Build on local and regional availability of fresh produce combined with 'at source' experience

The importance of Story

Food can become one of the anchor, must do experiences that motivate travel decision-making and provide a structure for an itinerary

- Local speciality food, most famous food,
“I had to try the Pig foot in Germany”
- Food in the ‘Most famous scenery’
- Unique experiences

“experience what we can’t eat in China”

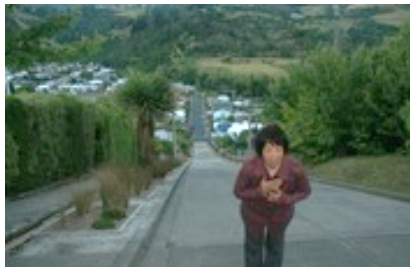
“get something special that is much better value there – e.g. crayfish”

➤ **Implication:**

Ensure story is clear/ understood, interesting and compelling for each experience

Developing the story: Famous and special

- Famous is good – the steepest street in the world, A place relevant to a famous person, A renowned mirror lake. Visitors will include these in their itineraries and it is a story to tell.
- It is extremely important to develop stories and develop reputation of different places and experiences throughout New Zealand. Regionally having a strong development of icons and unique experiences is important.
- These icon experiences or places can be quite quirky, intriguing and are not necessarily significant
- Oldest
- Highest
- Only
- Unique.....



Developing the food experience



Food as part of experience – SOCIAL

Integrating food into a total experience can be an added and valuable attraction

Taking people close to the source of food – if food can be integrated and it is from the local area this is a plus.

Cooking your own

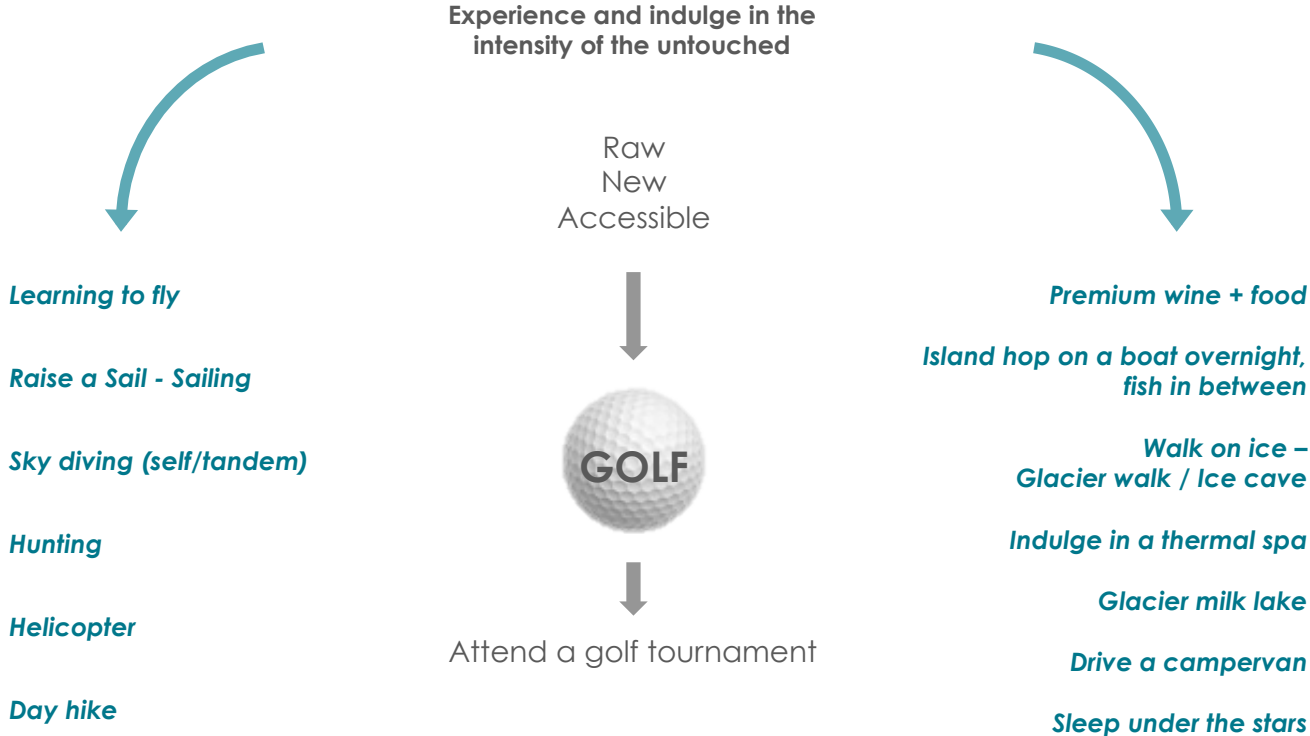
- Shared BBQ
 - Personalised experience
 - Asian flavours
 - Produce focus
 - BBQ meal – Pre Pack/ semi catered (box)
 - Include cooking with a actively experience
- Serviced apartment/motel
 - Purchased ingredients, FOOD BAG/ starter box
- Restaurant
 - Bring the fish that you caught

Cook together

Provide opportunities to enable visitors to be part of the cooking experience

➤ **Implication:** Emphasize option for interaction at source as well as new fresh ingredients

Layers of experience: Integration



The Chinese from Guangzhou prefer Chinese cuisine – how do we deliver?



Preference for Asian flavours

While the Chinese visitors absolutely want to try the local and unique food they also **strongly prefer Asian flavours** and will continue to want Asian experiences. The more travelled they are, the more open they are to European food

Asian food experiences

While Chinese is preferred, **Japanese and South-east-Asian flavours and styles are also enjoyed**. Sushi is preferred over sandwiches – any image with sandwiches will not be appealing

Experimentation

Ideally **tasting platters**, small plates and serving sizes, sharing enables to try different things with less risk. Tasting with an opportunity to buy is attractive, wine, honey, olive oil,... This becomes a gift with a story

Breakfast is important

Many Chinese like a hot breakfast – ideally with Congee available. They will go to a café if they know it has Congee. They will also sample something uniquely New Zealand

Hot is important

An **option of hot rice and noodle dishes for lunch** forms a staple while this is not always required they will seek it out. There is opportunity to further deliver simple noodle based dishes

Kiwi favourites are not for everyone...

Sandwiches least favourite option, fish and chips might be tried but generally not popular among Chinese travellers – hamburgers are preferred

Images are key – show me

Social review sites in Chinese – to locate great experiences

Immersion Experiences

These are images chosen by respondents to represent experiences they would most like to have in New Zealand (from a set of 100 provided)



and
rt



New &
unique



State of
Serenity

Immersion

State of
adrenalin



FORWARD



not
unique

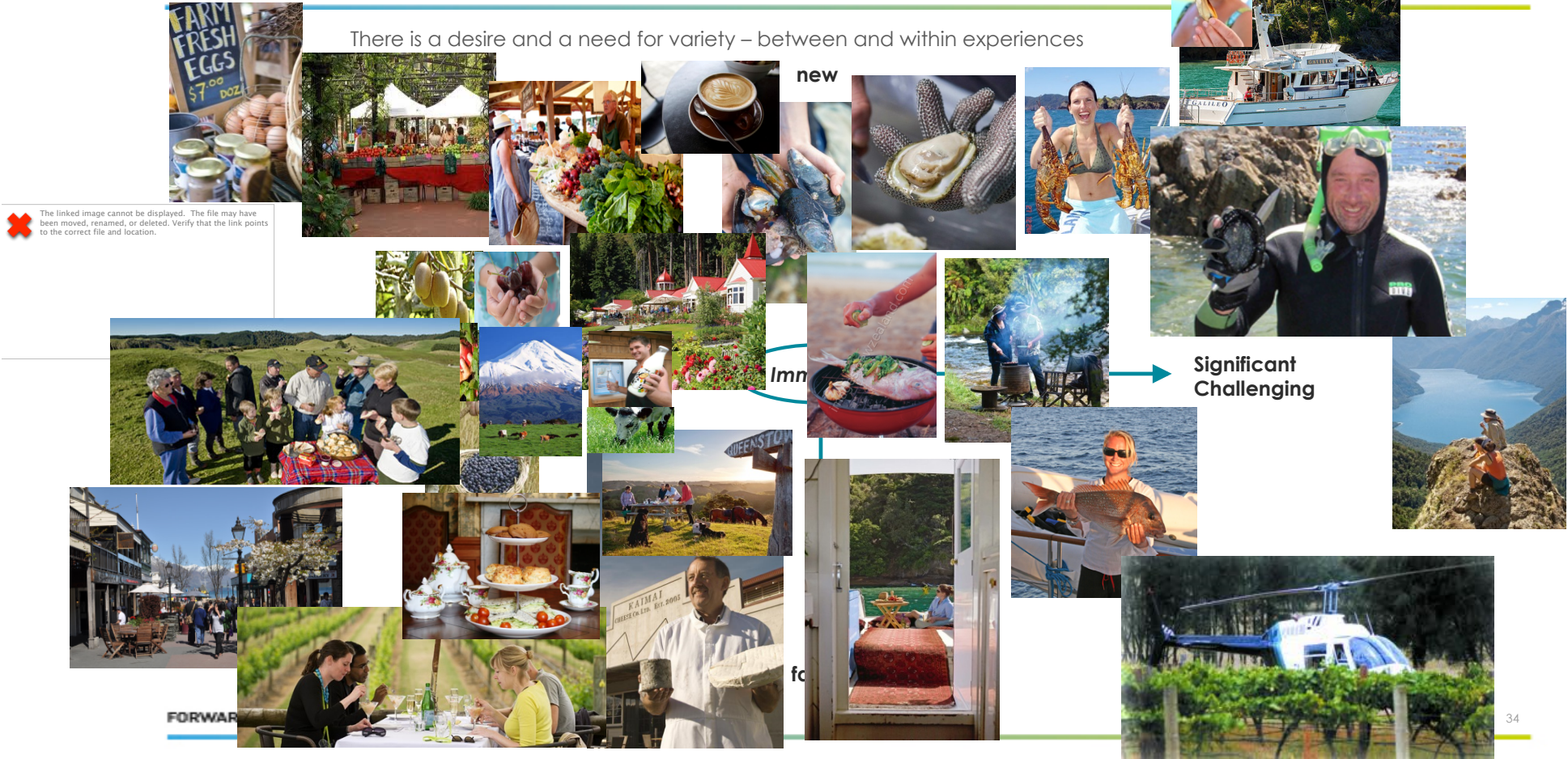


Different food needs & experiences



There is a desire and a need for variety – between and within experiences

 The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.



new

Imm

fo

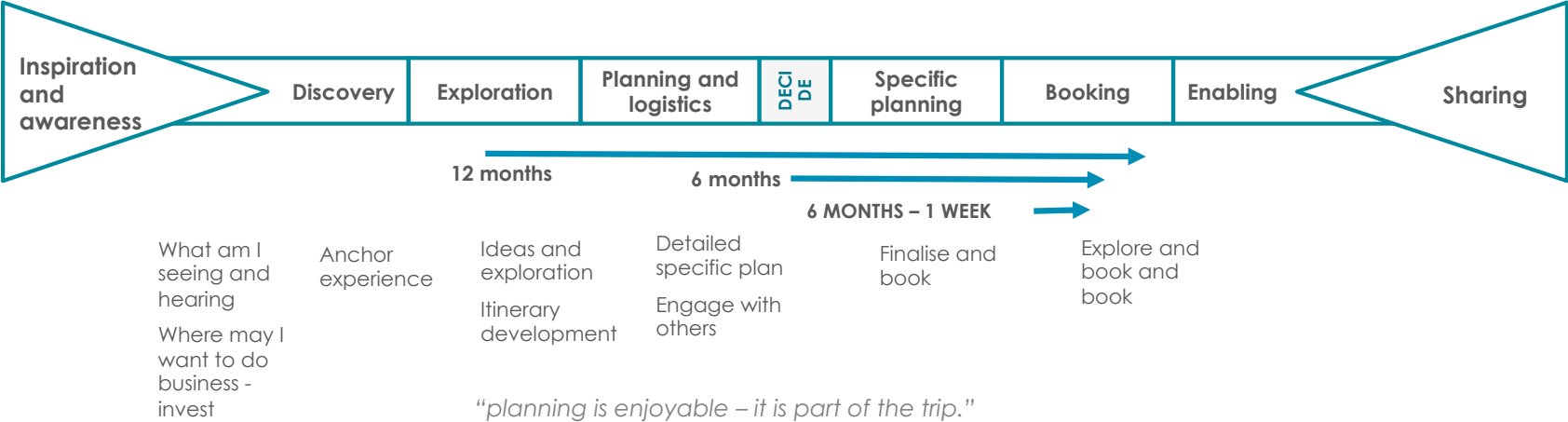
Significant
Challenging

FORWARD

The travel decision making process



Generally the planning process follows the same path for all. The more involved spend more time, others follow the guidance of friends more and also their own research.



Travellers will have multiple trips in planning at one time.

- Usually one or two in Asia and others out of Asia (Long haul)

➤ **Implication:**

Be on social and digital media

The importance of the anchor experience

Connection builds from an anchor experience

- Something that inspires, connects and starts exploration

"I would really like to do that"
"My friend said that is amazing"
"I want to see..."



How have other people incorporated this?

Itinerary

How could it work in a trip and a holiday experience?

What other **experiences** are around here?

What else would I like to do/see?
Who would like to do this with me?

Getting around

How to get there & get around?

What **food** experiences are good?

Accommodation

Where to stay and how to balance the budget

"I do not need to have 5 star hotels – I will go to Dubai for that"

What could I do
- I want to do

Time needed

Cost/budget

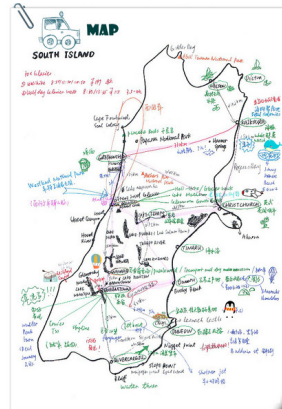
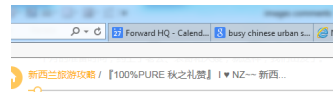
Who may want
to do this with
me

Check air fare
availability
and deals

Developing a possible itinerary



- Travellers look at other itineraries and experience of travellers on line E.g. www.mawofeng.cn
- They will use this as a start point for consideration and tailor something to suit themselves from a number of itineraries. This also gives them a good idea of how long the trip will take and timings



- DAY 1 SHANGHAI → SINGAPORE → CHRISTCHURCH
- DAY 2 → LAKE TEKAPO
- DAY 3 → DUNEDIN
- DAY 4 → INVERCARGILL
- DAY 5 → MILFORD SOUND → QUEENSTOWN
- DAY 6 → GLENORCHY
- DAY 7 → ARROWTOWN → WANAKA → FOX GLACIER
- DAY 8 → HOKITIKA
- DAY 9 → GREYMOUTH → HANMER SPRINGS
- DAY 10 → KAIKOURA → CHRISTCHURCH
- DAY 11 → SINGAPORE → SHANGHAI



DATE	TIME	LOCATION	TIME	MODE	D
4.4 (周四)	09:00	Shanghai Airport	09:00	飞机	0201
	09:05	Singapore	09:05	飞机	0202
	12:00	Christchurch	12:00	飞机	0203
4.5 (周五)	11:30	Agnesferry	11:30	渡轮	0204
	12:30	Christchurch	12:30	飞机	0205
	15:30	Lake Tekapo	15:30	自驾入住	0206
4.6 (周六)	8:00	Lake Tekapo	8:00	自驾	0207
	10:30	Omaka	10:30	自驾	0208
	11:30	Arden Country	11:30	自驾入住	0209
	13:00	Dunedin	13:00	自驾	0210
	14:00	Omaka	14:00	自驾入住	0211
4.7 (周日)	8:00	Arden Country	8:00	自驾	0212
	12:30	Bluff	12:30	自驾	0213
	14:00	The Stone Hut & Breakfast	14:00	自驾入住	0214
	9:00	The Stone Hut & Breakfast	9:00	自驾	0215
	10:30	Milford Sound	10:30	自驾	0216
	14:00	Captain Cook & Apartments	14:00	自驾入住	0217
4.8 (周一)	17:30	Queenstown	17:30	自驾入住	0218
4.9 (周二)	全天	1. Highland Horse Riding Paradise on the Beach 2. Shotover Jet/Double Jet 3. Milford Sound and Invercargill 4. Milford Sound and Invercargill 5. Milford Sound 6. Milford Sound	08:00/14:00 10:00/14:00 10:00/14:00 10:00/14:00 10:00/14:00 10:00/14:00	自驾 自驾 自驾 自驾 自驾 自驾	0219 0220 0221 0222 0223 0224
4.10 (周三)	10:00	Queenstown	10:00	自驾	0225
	13:30	Queenstown	13:30	自驾	0226
	14:30	Frankton	14:30	自驾	0227
	18:00	Jim Simpson Pub	18:00	自驾入住	0228
4.11 (周四)	上午/下午	Fox Glacier	上午/下午	自驾	0229
	10:00	Jim Simpson Pub	10:00	自驾	0230
	21:00	Alpine Retreat	21:00	自驾入住	0231
4.12 (周五)	10:00	Queenstown	10:00	自驾	0232
	11:30	Queenstown	11:30	自驾	0233
	14:30	Queenstown	14:30	自驾	0234
	16:00	Queenstown	16:00	自驾	0235
4.13 (周六)	10:00	Queenstown	10:00	自驾	0236
	12:00	Queenstown	12:00	自驾	0237
	13:00	Queenstown	13:00	自驾	0238
4.14 (周日)	10:00	Queenstown	10:00	自驾	0239
	13:00	Queenstown	13:00	自驾	0240
4.15 (周一)	11:00	Queenstown	11:00	自驾	0241
	14:30	Queenstown	14:30	自驾	0242

FORWARD

This is one persons posting

How to connect

<p>The story</p>	<ul style="list-style-type: none"> • Tell the story – not just what but why. Why is it unique and special (must do, the original, oldest, highest, only etc), what is the origin, the method of..., the chef, the flavours • Include an element of intensity/ challenge – only one person at a time...discover, try, feel • Enable the zero distance immersion experience – feel it, see it, touch it, do it, taste it, share it • Give layers to the experience – watch, do, hear, learn, share (food – eat, sit in..., see..., as the sun goes down..., share...)
<p>The images</p>	<ul style="list-style-type: none"> • Ensure images have a sense of fresh vibrance and the viewer can imagine themselves in the image <ul style="list-style-type: none"> • You can imagine someone just out of shot • There are people up close in the image • The people are interacting with the camera – dynamic, fun, engaging • There is an interesting photographic effect/ angle
<p>Enabling/ sharing</p>	<ul style="list-style-type: none"> • At all points enable and encourage sharing (E.g. great photo opportunities, ask them to review)
<p>Reviews are good</p>	<ul style="list-style-type: none"> • Encourage reviews on sharing websites and social media • Enable togetherness and interaction – large sharing tables for individuals to be with others or in groups together, booking capacity flexibility is also very helpful – although large groups happy to split up

How to connect

Be on local search navigation, apps, websites	<ul style="list-style-type: none"> • Keep it up to date • Have reviews • Enable translation to Mandarin • Have geo-location if possible • Simple explanation of experience/ offer, times, considerations • The story – why is this special
The deal	<ul style="list-style-type: none"> • Offer a discount if: Combined or extended, multiple experiences; more people (e.g. over 6); early booking
Deliver	<ul style="list-style-type: none"> • If there is a promise – and its not available – deliver a close alternative (e.g. smoked fresh trout if don't catch one)
Become part of an itinerary	<ul style="list-style-type: none"> • Have a reason to be a must do experience (story experience images) – and become part of example (or real) itineraries
Enable a zero distance immersion offer	<ul style="list-style-type: none"> • E.g. catch it / select it – have it cooked at local restaurant (see it, catch it, cook it, eat it) • “eat like the locals’ community and local food experiences highly valued – enable these to be found. E.g. coffee culture, suburban café, beach eating, home food, supermarkets, local markets
Maintain relationships with visitors	<ul style="list-style-type: none"> • If they love it, they will share it and may return • Offer the next or new or different experience – to do next time • Collect email or contact details for occasional communication

How to connect

Work regionally	<ul style="list-style-type: none"> • To build a rich and varied local experience offer • Develop iconic regional experiences/ stories to enable itinerary development (anchor experiences – must do, regionally flavoured)
Build seasonality	<ul style="list-style-type: none"> • What is good, when – layers of experience throughout the year – activities more than events
Have local Apps	<ul style="list-style-type: none"> • With geo-location, Mandarin option • Food, activities, accommodation, transport • Search themes: seasons, adventure, sea food • Must be comprehensive and up-to-date
Have signage/ indications of experience	<ul style="list-style-type: none"> • To allow serendipitous discovery – enable understanding (why special, who has been there) • Have clear invitation – welcome
Enable last minute planning and booking	<ul style="list-style-type: none"> • Have a clear on line link in all communication and touch points • Be clear how long the experience will take • Level of intensity and ease • Have clear price, time and gear requirements • Have information on weather suitability for next day if required (both online and on signage at the experience) • Have a booking system available and responsive until at least 9pm (online confirmation, telephone confirmation available) • Make it clear if booking required

New Zealand: Building interest to activation

A scenic landscape of New Zealand featuring snow-capped mountains, green fields, and a hot air balloon floating in the sky. The image is overlaid with a central diagram and text.

New Zealand 100% Pure

Activation =

FRESH VIBRANCE & INTENSITY
Of original untouched nature

PLACE
+
EXPERIENCE

ZERO DISTANCE immersion

As the sense of experience and connection grow then commitment to travel to New Zealand is achieved

Feel it, see it, touch it, do it, taste it, share it



FORWARD



A | Auckland
Airport

