

INCREASING CONSIDERATION OF THE AUSTRALIAN MARKET... INTO WINTER

Prepared for AIAL
By Big Picture 2018





The how & the who



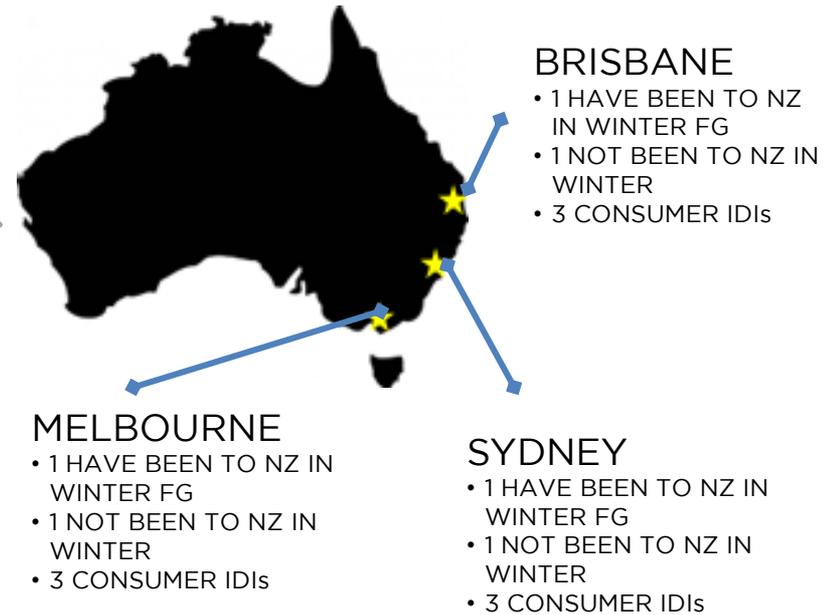
To gather actionable outtakes that will help AIAL and upper/ central North Island tourism industry maximise visitation between May and October. As well as define what the Ultimate Australian Winter proposition for upper/central North Island should look like

6 IN MARKET FOCUS GROUPS & 9 IN DEPTH INTERVIEWS:

- 3 Groups & 5 Depths with consumers who **HAVE BEEN TO NZ IN WINTER**
- 28-45 years of age
- Skew higher HHI \$100K+, include HHI \$75K with families
- Travelled to NZ within last 3 years
- Aim to have majority travel to NZ in shoulder and winter months

3 Groups & 4 Depths with consumers who **HAVE NOT BEEN TO NZ IN WINTER**

- 28-45 years of age
- Skew higher HHI \$100K+, include HHI \$75K with families
- Considering travelling to NZ within next 12 - 24 months - firmly on wish list



3 OBSERVATIONS WE HAD ABOUT THE AUSTRALIAN TRAVELLER





I. They seek out what they don't have in their own back yard



- **DIFFERENCE IN NATURE:** looking for contrast to the vast barrenness to parts of Aus. Lakes, seas and pools have a distinctive colour
- **DIFFERENCE IN BUSYNESS:** looking for small towns that are on the outskirts from bigger cities or round the corner from natural sites
- **DIFFERENCE IN ACTIVITIES:** looking for variety of experiences not possible to do as part of one trip in Australia

SO: Imagery that's juxtaposed to their everyday city life and even Australia's version of nature. Think green, lush versus brown, arid bush, coastline versus beach, more remote versus crowded places....



2. They are happy to drive – it's in their blood



- **DRIVING IS SECOND NATURE...** – they feel comfortable driving so it is not a stressful way to get around
- **... WHICH MEANS THEY'RE PREPARED TO GO FAR** - Day trips that involve a drive there and back are considered more than possible
- **SELF DRIVE OFFERS FREEDOM, NOT HASSLE** – in fact for many driving in a new place indicates they are on holiday because it offers the ability to discover, without feeling restricted

SO: The ease of stepping off the airport seamlessly into a rental car is an important part of the holiday experience. Campervanning still resonates with travellers because the ability to drive and explore themselves, aligns to their existing behaviour



3. F&B can make or break the trip



- **AUSSIES REALLY LIKE GOOD FOOD** – they pride themselves on having really good food & wine in Aus so have high quality as well as an appetite for experimentation
- **IT'S AN ACTIVITY IN THEIR MIND** – whether you are going to a winery / brewery for a tour or simply taking a couple of hours to enjoy a meal, it's considered part of the day's itinerary
- **F&B IS MORE THAN JUST THE FOOD, IT REPRESENTS CULTURE** – there's a sophistication that comes not just what you're eating but how – the setting & experience is crucial

SO: There's an opportunity to develop a more clearly defined F&B story to cater to their desire to experience NZ in this way. It presents a key tangible reason to visit the regions



**THOSE ARE SIMILARITIES, BUT
WHAT ARE THE DIFFERENCES
BY STATE WE FOUND**



SYDNEY - WHERE YOU WORK HARD FOR YOUR MONEY

- **A CITY WHERE THEY ARE FOCUSSED ON GETTING AHEAD** - there is a level of ambitiousness that perforates everyday life. The standard of living is high, which is reflected in the salaries paid & rents paid out. There is an attitude where you can always do more, which everyone feels the edge of

SO: the idea of respite & being able to switch off is at the heart of the reason to travel for many

- **A LIFESTYLE THAT'S TIME POOR BUT PLACES EMPHASIS ON STYLE** - use of words like hectic & frantic are commonplace. There is a direct correlation between busyness and success in the eyes of Sydneynites. Not uncommon to see business men in suits down the pub most evenings

SO: busy means making it easy when it comes to book and planning travel is key

- **PEOPLE WHO HAVE A MORE INTERNATIONAL VIEW OF THE WORLD** - a travel hub that means they are spoilt with where they can visit & travel. The bar is also set high because of this when it comes to what's worthy of a trip in their eyes. They look to appear worldly wise - a lot of social currency in travel

SO: focus on the world class experiences they can have in NZ so they can boast on their return

MELBOURNE – A COLLECTION OF ALTERNATIVES

- **A CITY WHERE THEY CELEBRATE CULTURAL DIFFERENCE** - there's a festival for everyone, designed specifically to invite different communities to share their culture. Interestingly this cultural engagement is quite structured - an organised party., They are dealing with often bubbling tensions underneath.
- **A LIFESTYLE THAT OFFERS OPTIONS** - diversity thrives in Melbourne as eccentricities are accepted more easily, which means that you can get involved with a all sorts of activities. There is always something to do that is new and different - as well as finding kindred spirits who will join you
- **PEOPLE WHO SEE THEMSELVES AS MORE SOPHISTICATED** - compared to the rest of Australia, Melbournites often pretend not to care but actually think their way of life is better. They enjoy specialised craft beers, coffee and art that have personality. They have a specific taste that halos creative flare

SO: they appreciate culture and want to engage with local & native cultural practices but don't let themselves go fully in

SO: they like having a range of activities they can choose from so that they feel they can experience it all and not miss out

SO: We need to talk directly to Food & Bev experiences that cater to their palate & need to feel cultured

BRISBANE - A TOWN VIBE IN A CITY

- **A CITY THAT LACKS DIVERSITY** - weather that's sunny everyday, and a city that they talk about as being just a little too curated it could be considered boring. There's not as much variety of restaurants and cuisine that other cities have

SO: The idea of different is more attractive than sunny. They are looking for variety in how they experience

- **A LIFESTYLE THAT APPRECIATES HAVING A BIT MORE TIME** - most try to avoid the hustle & bustle, and it's not something that they want to seek out, even for a weekend! Space, being free from congestion, and not having to hurry are what they look for in a city - after all rushing is not that much fun in heat

SO: Small and less busy is not a bad thing in their eyes. Instead they see our size as a means of delivering more familiar experience

- **PEOPLE WHO LIKE IT DONE FOR THEM** - there seemed to be a greater appreciation of package holidays in this market. More talked about cruises as how they prefer to travel, but also take longer holidays - especially with the Active Boomers

SO: We need to make it feel easy & simple so that it doesn't require time & energy to organise. A step on, step off experience



An aerial photograph showing a vast landscape. A winding river flows through a dense forest of white, fluffy clouds. The sky above is a clear, deep blue with some light rays emanating from the top center. The overall scene is bright and expansive.

How does your LIFE STAGE impact how & why you like to travel?

Independent Professionals – Seeking CONNECTION with others & themselves

GETTING AWAY FROM A LIFE THAT IS...

STRESSFUL

The daily grind & pressures that exist in a typical working day mean they are not often afforded time to unwind, relax & switch off...

...SO THEY'RE ATTRACTED TOWARD...

NATURE

... the antidote to big cities. Focusing on the simplicity of life, combined with the security of civilisation nearby so that it's not too 'hard', nature's a compelling offer

WHICH MEANS, HOW THEY TRAVEL....

COUPLES / INDIVIDUALLY

They seek discovery, which often involves serendipity & an element of the unknown. It's what makes getting 'lost' feel exciting & authentic

HOW TO KICK START AN IDEA TO TRAVEL TO NZ OFF PEAK – It's all about digital Images they see on websites, Instagram & Facebook of what their friends are posting feed the desire to get out there & discover places for themselves. This is particularly true at a time of year when they are 'quieter' & not doing as much to report on social media

Families – looking for **EASY** to keep everyone happy

GETTING AWAY FROM A LIFE THAT IS...

ROUTINISED

The monotony of providing & caring for a family means that travel = freedom from the expectations and demands of family life....

...SO THEY'RE ATTRACTED TOWARD...

SAFE ADVENTURE

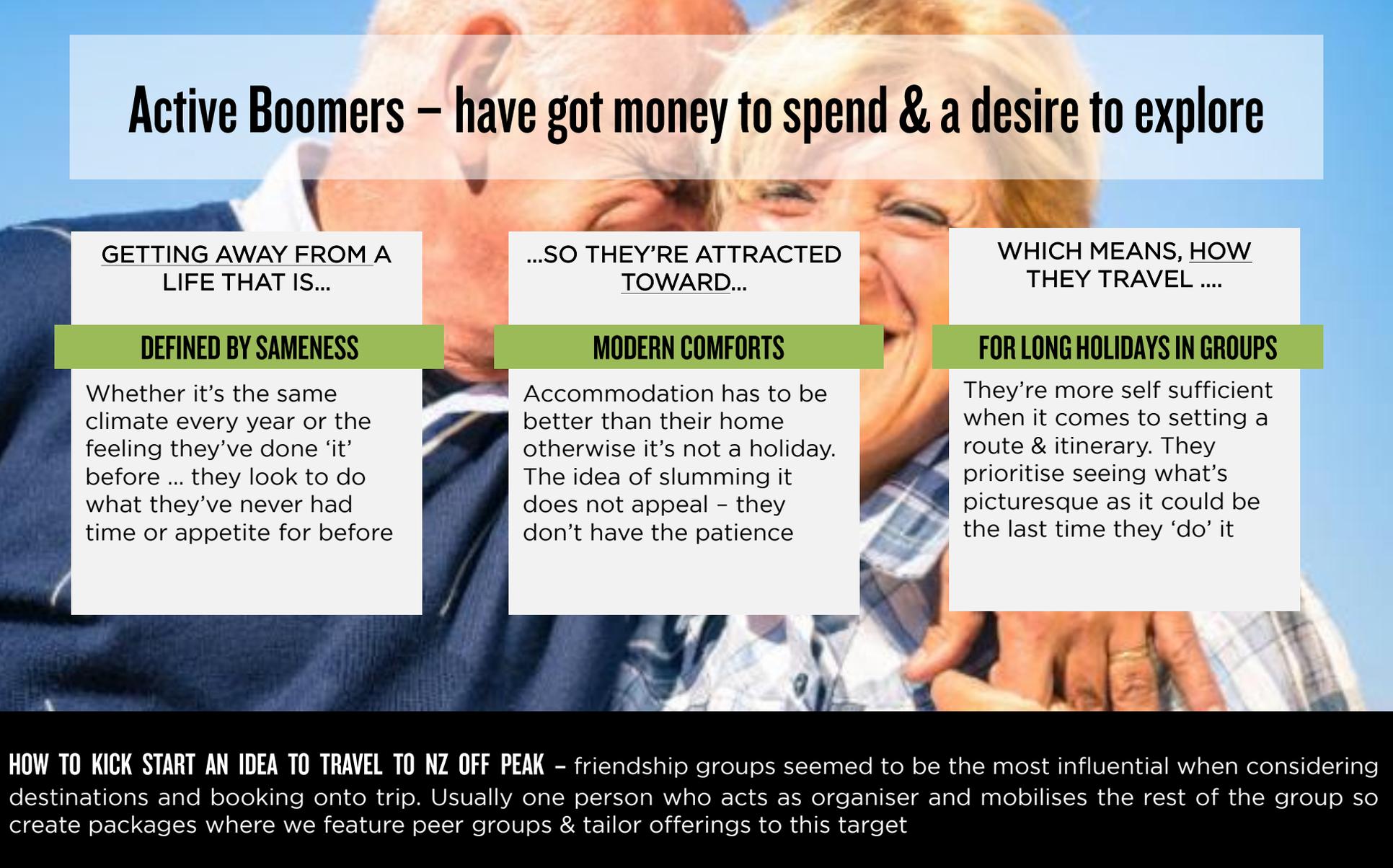
Possibilities of sharing an amazing experience with their children, enriching all their lives – it's passing on an appreciation for travel

WHICH MEANS, HOW THEY TRAVEL

WITH EASE & CONVENIENCE

Organising a trip for the many becomes daunting if it's too hard. They need reassurance the kids will be entertained & that they can base themselves in one place & see lots

HOW TO KICK START AN IDEA TO TRAVEL TO NZ OFF PEAK – create compelling all inclusive packages where there is a range of diverse activities and experiences the kids (and the adults!) will enjoy. Streamlining the process so that there is less thinking time and aligning price packages to school holidays will get most over the line



Active Boomers – have got money to spend & a desire to explore

GETTING AWAY FROM A LIFE THAT IS...

DEFINED BY SAMENESS

Whether it's the same climate every year or the feeling they've done 'it' before ... they look to do what they've never had time or appetite for before

...SO THEY'RE ATTRACTED TOWARD...

MODERN COMFORTS

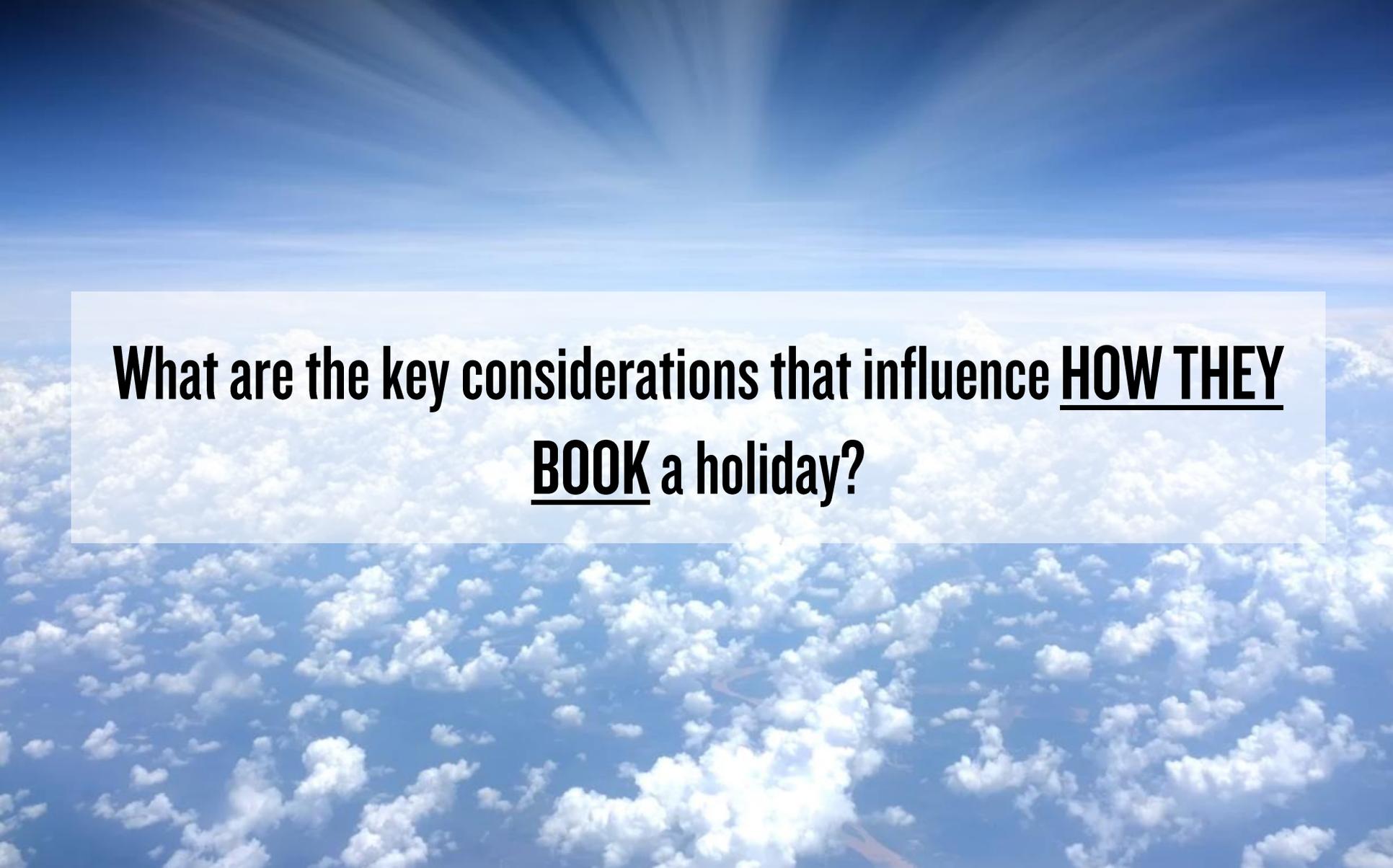
Accommodation has to be better than their home otherwise it's not a holiday. The idea of slumming it does not appeal – they don't have the patience

WHICH MEANS, HOW THEY TRAVEL

FOR LONG HOLIDAYS IN GROUPS

They're more self sufficient when it comes to setting a route & itinerary. They prioritise seeing what's picturesque as it could be the last time they 'do' it

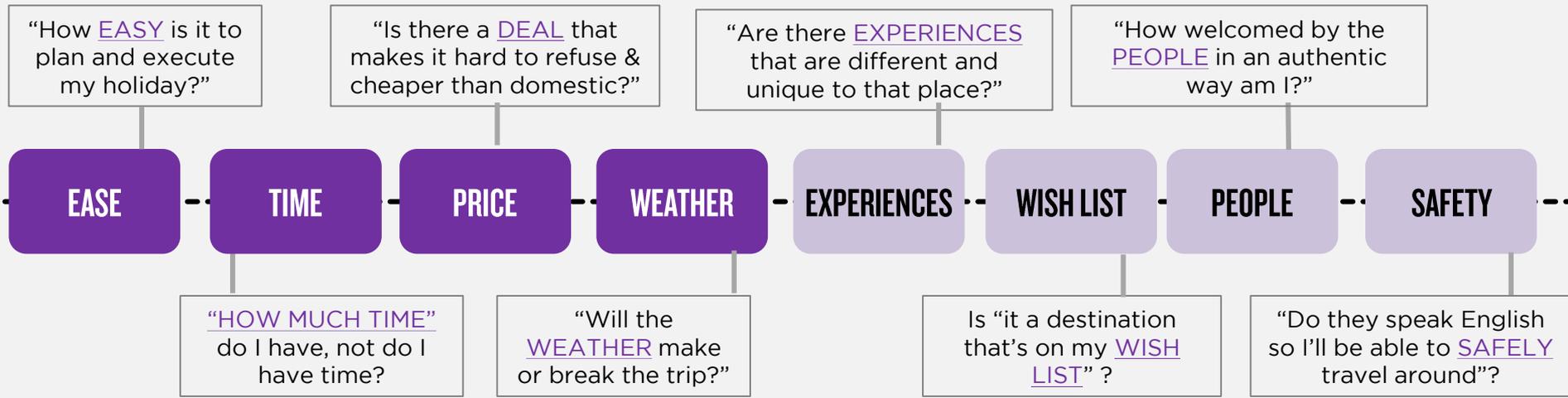
HOW TO KICK START AN IDEA TO TRAVEL TO NZ OFF PEAK – friendship groups seemed to be the most influential when considering destinations and booking onto trip. Usually one person who acts as organiser and mobilises the rest of the group so create packages where we feature peer groups & tailor offerings to this target



What are the key considerations that influence HOW THEY
BOOK a holiday?



Aussies are looking for **EASE** and **EXPERIENCES** in the booking journey in order to get them across the line

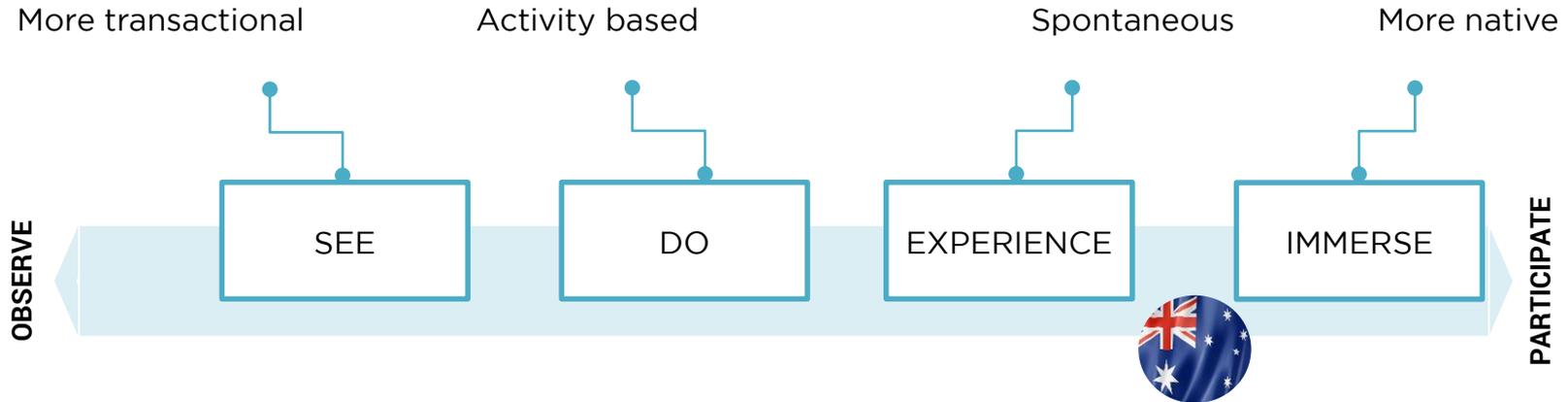




HOW INVOLVED are they looking to be when it comes to experiences on holiday?



Aussies are seeking a DEEPER & MORE IMMERSIVE experience relative to other markets



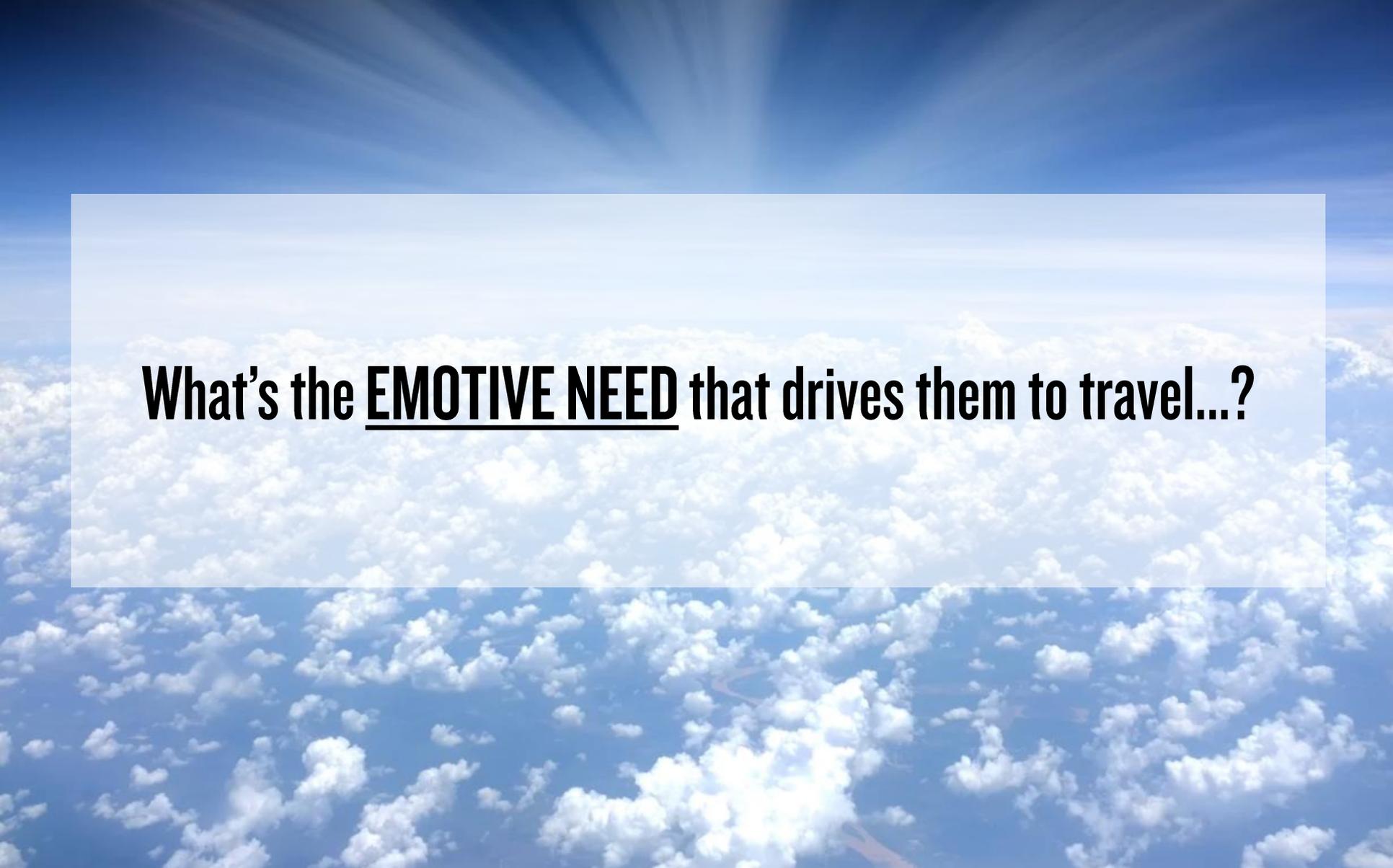
WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : Aussies are looking for unique experiences that feel less manufactured and more accidental – activities that can be booked spontaneously that make up rich day’s itinerary delivers depth of experience



Active Boomers are time & energy rich, and those from Victoria value connection, making both more immersive when travelling



WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : Independent professionals and active boomer couples seek personal connections they can have with locals when in NZ 'off peak' for example, time with the fisherman on a charter

An aerial photograph of a vast landscape. A winding river flows through a dense forest of white, fluffy clouds. The sky is a deep blue, and the sun is visible in the upper left corner, casting rays of light across the scene. The overall atmosphere is bright and serene.

What's the **EMOTIVE NEED** that drives them to travel...?



Aussies are looking for real discovery, exploration that is authentic, rather than feeling created for tourists

REALNESS THAT DOESN'T
FEEL ENGINEERED FOR
VISITORS

An important component of
realness for Aussies is
authentic, **CONNECTION
WITH LOCALS**... a chat at
the fuel pump or cafe... they
seek meaningful & unique
experiences



COMBINED WITH DISCOVERY
WHERE YOU 'STUMBLE'
ACROSS EXPERIENCES

The ability to **ROAM FREE
WITHOUT NEEDING TO PLAN
OUT A ROUTE** makes them
feel they are living like a local...
some fortunate serendipity for
their trip

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : Aussies want to explore and feel intrepid when they get here, not for the booking process to require lots of exploring as it starts to feel over-organised



What about NZ?
Five observations



I. They expect us to be a miniature, less developed Australia



- **BELIEVE THEY HAVE 'SEEN' IT BEFORE:** THEY THINK THEY KNOW WHAT IT'LL BE LIKE WITHOUT COMING. In particular that...
 - Auckland will be like Adelaide
 - People are just like them
 - Landscapes are really not that dissimilar to Tasmania
- **WHICH IS WHY NZ GOES TO THE BOTTOM OF THE BUCKET LIST:** THEY OFTEN WAIT TO COME – we are a destination that they know they should visit, but other places more worthy of visiting first
- **THERE'S ALSO NOT ALWAYS A CLEAR IMPETUS TO GO:** ESPECIALLY TRUE FOR THOSE WHO HAVEN'T BEEN – they know that 'nature is beautiful' but the specifics on 'why now' is less known

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : City offerings that are distinctly NZ reassure Aussies that there'll be something to do, whilst also convincing them we have unique places to visit. THINK: Food & Bev named experiences, activities tied to place



2. The reality of NZ is there's vitality & vibrancy when they get here



- **ENERGY IN NATURE: THEY EXPECT NATURE TO BE SERENE** – wildlife and outdoors offers so much diverse choice
- **ENERGY IN OUR CITIES: AUCKLAND AND WELLINGTON ARE MORE ALIVE** – instead of being sleepy there's a buzz most don't consider
- **ENERGY IN OUR INTERACTIONS: BEING WELCOMED LIKE A LOCAL** – Friendliness of people means they are compelled into action & getting involved

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : Promotion of festivals and / or events where locals will gather create a unique reason to come during shoulder / winter, whilst delivering energy



3. They come here looking for NATURE... closely followed by ACTIVITIES

Defined by our diversity of amazing nature; geothermal, glaciers, waterways. A country that's not heavily populated so nature is more prominent. You can become happily lost in nature without a fear of insects or animals



NATURE & LANDSCAPES



ACTIVITIES & EVENTS

Given the importance of experiences... F&B, walks, caving, rafting, bungee, niche ski



PEOPLE & CULTURE

Friendly, but also very laid back



HISTORY & ARCHITECTURE

Considered similar to Aus as a new country so little perceived difference

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : essentially we are about activities in nature.... But if we want to deeply connect with how they like to travel and see the world it's the people & culture connections that unlocks the desire to be immersed, rather than just to experience



4. S. Island is the poster pin up for NZ, with N. Island considered the 'business end'

SOUTH ISLAND - THE ESSENCE OF NZ

ORDER OF MENTIONS

QUEENSTOWN - a wish list destination, & packages up everything that defines NZ
NATURAL BEAUTY - snow covered mountains with long open roads
MILFORD SOUNDS & TRACK - iconic hiking & walking that they cant experience in AU
CHRISTCHURCH - particularly EQ, but also an entry hub to the SI
SKI - better skiing than Australia, and for many a sole reason for a trip if they are enthusiasts
WINERIES - know there are note worthy wine regions down south

NORTH ISLAND - THE BUSY HALF

ORDER OF MENTIONS

AUCKLAND - the only city we have
BAY OF ISLANDS - consistently comes up
MAORI CULTURE & ROTORUA - particularly Rotorua (as it is part of a nursery rhyme they all learn as children; but also throughout the Island
WAITOMO CAVES - growing in popularity and in Aussies' awareness
HOBBITON - known as a site they want to visit. Not always considered a N. Island based activity
POPULATED - towns & cities, and less nature as a result so less picturesque and beautiful

More different from their ordinary

Closer to their ordinary



5. Auckland is where you land... and then get out

“Auckland holds no emotion or identity to it... there is nothing that draws me there”

“When you ask people what they did in Auckland most often than not, they say they just left”

“Waiheke is worth a day’s visit but only when you know about it. Fortunately our friends told us about it”



- **A CITY THAT IS A TRANSPORT HUB...** : In many Aussies’ minds, Auckland is not always seen as a destination in its’ own right
- **...THAT DOESN’T HAVE MUCH (ON THE SURFACE OF IT)** : does not readily have activities that Aussies associate with NZ
- **AND CAN BE HARD TO GET AROUND** : without car rental some of the desirable sites like W. Coast, are hard to reach

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : create Auckland itineraries that promote activities we know deliver to Aussies’ needs more overtly



All in all, a NZ HOLIDAY is easy & accessible for the Australian market, but does not appeal to their sense of intrigue, meaning they remain unconvinced by the experiences available & the impact of seasonality on their trip

EASE

TIME

PRICE

WEATHER

EXPERIENCES

WISH LIST

PEOPLE

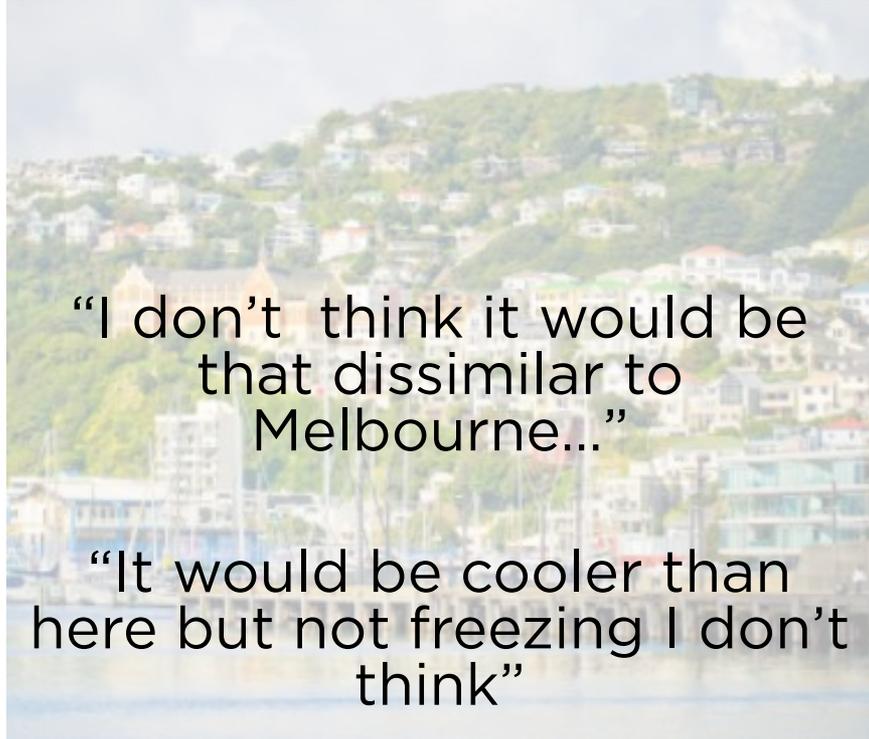
SAFETY

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : the challenge is to appeal to Aussies' mental considerations so that they are convinced there's enough to do so there is value in coming

An aerial photograph of a landscape featuring a winding river and a large white cloud. The text is overlaid on a semi-transparent white rectangular box in the upper middle section of the image.

What are Australians' expectations for WINTER IN NZ?...

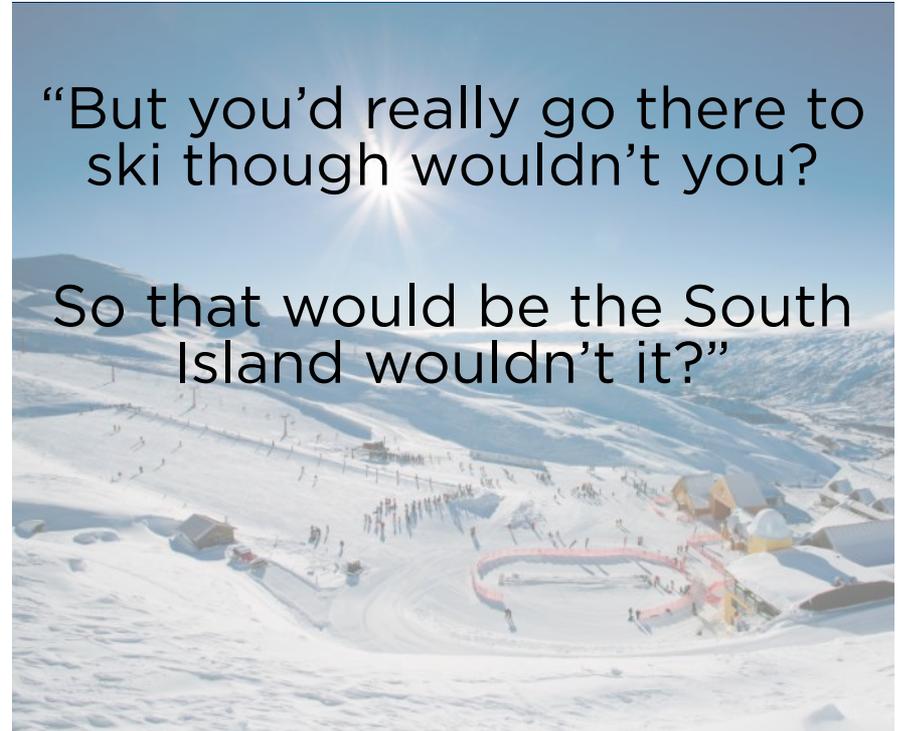
When we say NZ WINTER, what do they typically think?



“I don’t think it would be that dissimilar to Melbourne...”

“It would be cooler than here but not freezing I don’t think”

WHAT THIS MEANS FOR NZ WINTER : it’s not about what it looks like, it’s more about WHAT YOU CAN DO



“But you’d really go there to ski though wouldn’t you?”

So that would be the South Island wouldn’t it?”

WHAT THIS MEANS FOR NZ WINTER : a more purposeful trip that usually has SNOW as the core driver



NZ WINTER begins to feel more complicated when it comes to planning a route in challenging weather conditions. Experiences are largely considered Ski dominant, which can feel limited driving us down the wish list



Idea of winter weather for those in Victoria more negative than those in Melbourne

WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : although the weather is seen as not bad to some, it really isn't considered good, meaning we need to showcase how it doesn't impact their experiences. If anything it's how shoulder / winter conditions add to the experience

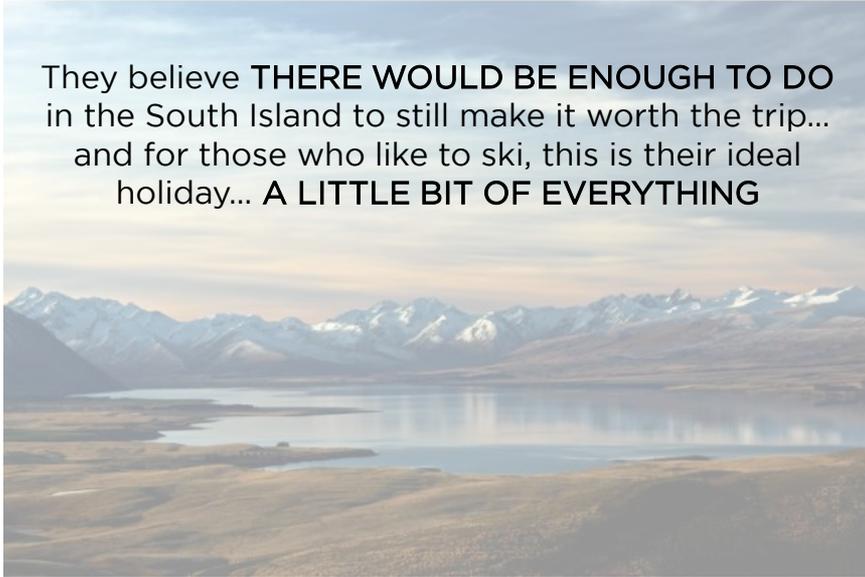
A group of five young adults (three women and two men) are smiling and taking a selfie on a beach. They are huddled together, with one person in the foreground holding a camera. The background shows the ocean waves and sandy beach. The text is overlaid on a semi-transparent white box.

We need to **SHIFT THE MIND SET** from 'can't do in Winter' to 'can do in June'

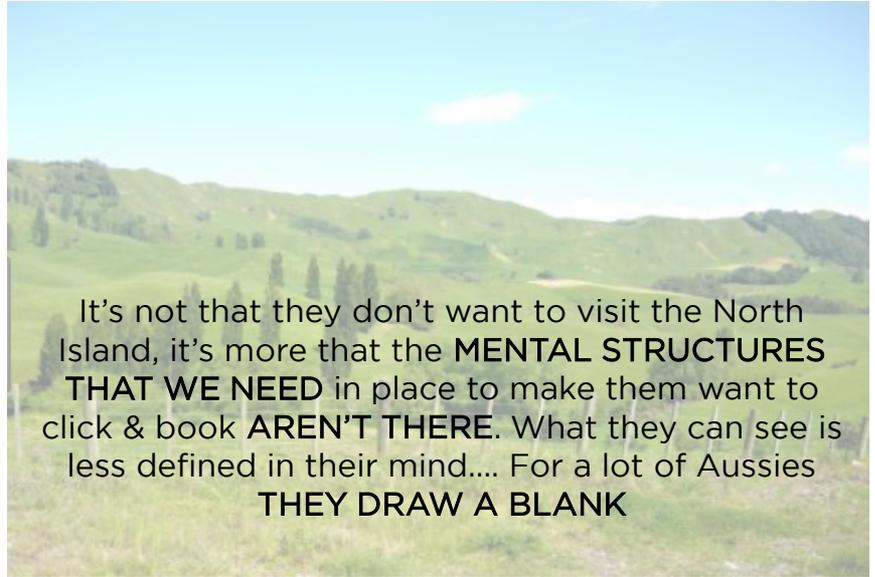


South Island is an easier Winter sell

They believe **THERE WOULD BE ENOUGH TO DO** in the South Island to still make it worth the trip... and for those who like to ski, this is their ideal holiday... **A LITTLE BIT OF EVERYTHING**



It's not that they don't want to visit the North Island, it's more that the **MENTAL STRUCTURES THAT WE NEED** in place to make them want to click & book **AREN'T THERE**. What they can see is less defined in their mind.... For a lot of Aussies **THEY DRAW A BLANK**



WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS : Aussies don't actually know what to do in a North Island winter... simply talking about it more will help



Creating **THEIR IDEAL OFF PEAK HOLIDAY**

We gave them a range of North Island imagery and tasked them with the job of creating the ultimate North Island Off Peak holiday



Here are some of their ideas...

NZ WINTER: *More than you think*

A NEW ZEALAND VERSION OF A WINTER HOLIDAY | EXPERIENCE EXEMPLIFIES THE FOLLOWING VALUES:
(please check all that apply)

Adventure Openness Connection Indoors	Quality Relaxation Indoors	Comfort Cosiness Interest	Exploration Energy Rustic	Scenic Cultural Outdoors
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IMAGERY THAT REPRESENTS A NEW ZEALAND VERSION OF THIS WINTER FOR YOU:

*Snow capped mountain tops
rolling hills
grainy trees
fireplace*



TO NE & ATTITUDE THAT BEST REPRESENTS A NEW ZEALAND VERSION OF WINTER FOR YOU:
(e.g. serious vs. silly, modern vs. old)

bright clear fresh relaxing



WORDS, PHRASES, DESCRIPTIONS AND TAG LINES THAT WOULD ENTICE YOU TO COME TO NZ IN WINTER:
See above



NZ WINTER:

A NEW ZEALAND VERSION OF A WINTER HOLIDAY | EXPERIENCE EXEMPLIFIES THE FOLLOWING VALUES:
(please check all that apply)

Adventure Openness Connection Indoors	Quality Relaxation Indoors	Comfort Cosiness Interest	Exploration Energy Rustic	Scenic Cultural Outdoors
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IMAGERY THAT REPRESENTS A NEW ZEALAND VERSION OF THIS WINTER FOR YOU:

Spring mountains wilderness hiking good food/wine



TO NE & ATTITUDE THAT BEST REPRESENTS A NEW ZEALAND VERSION OF WINTER FOR YOU:
(e.g. serious vs. silly, modern vs. traditional, rugged, dark)

priceless fun safe / pamper adventurous open-spontaneous



WORDS, PHRASES, DESCRIPTIONS AND TAG LINES THAT WOULD ENTICE YOU TO COME TO NZ IN WINTER:

natural beauty adventures activities hospitable culture access to awe locations



NZ WINTER: *Discover the cool side of NZ*

A NEW ZEALAND VERSION OF A WINTER HOLIDAY | EXPERIENCE EXEMPLIFIES THE FOLLOWING VALUES:
(please check all that apply)

Adventure Openness Connection Indoors	Quality Relaxation Indoors	Comfort Cosiness Interest	Exploration Energy Rustic	Scenic Cultural Outdoors
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IMAGERY THAT REPRESENTS A NEW ZEALAND VERSION OF THIS WINTER FOR YOU:

- Ski fields*
- Hot springs*
- Rolling fields*
- mitf*
- Colder than home.*

TO NE & ATTITUDE THAT BEST REPRESENTS A NEW ZEALAND VERSION OF WINTER FOR YOU:
(e.g. serious vs. silly, modern vs. traditional, bright vs. dark)

hard-bock, but adventures. Blessed. Resin + unique. Peace.

WORDS, PHRASES, DESCRIPTIONS AND TAG LINES THAT WOULD ENTICE YOU TO COME TO NZ IN WINTER:





What about **THEIR REACTIONS** to the Fire & Ice Campaign?



The good news is they loved our AIAL execution with many changing their view of NZ Winter



NORTH ISLAND WINTER GETAWAY

IN THEIR OWN WORDS

“Looks amazing... reminds me of Iceland... I never new they had volcanoes like that in NZ”

“It definitely makes me think about giving the North Island a try”

“It feels a little old fashioned. I think it’s the music”

WHAT THEY LIKE

VOLCANOES – Different that they don’t see at home and attention grabbing from beginning throughout
CAVES & GLOW-WORMS – reminded them of a feature they knew NZ was famous for – image looks special
RANGE & DIVERSITY OF ACTIVITIES – that they can do no matter the weather. Pace of trip from video is still high
HOT SPRINGS – luxurious & relaxation – what they seek on holiday. Natural springs not always available in Aus
CAMPERVAN DRIVING - showcases travel between activities and places of interest
HOBBITON – overt feature of iconic & distinctive NZ site

WHAT THEY LIKE LESS

PACE & MUSIC – the feeling of being active dominates being relaxed. Music not coherent
CITY SHOTS – not something that inspires them to book a NZ holiday as doesn’t promote the unique
SNOW/MOUNTAINS HEAVY – limited breadth of a appeal for a few, esp. non skiers
QUALITY OF IMAGES – especially when contrasted against TNZ edit. They can feel dated & overly promotional, rather than ‘showcasing’ organic ideas
MAP – mentioned of feeling childish & gimmicky

Maintaining & Shifting four measures that matter most

↑ **EASE**

Images of driving & the route map help with the mental planning of the trip

↑ **WEATHER**

It shows that the weather will be better than they think

↑ **WISH LIST**

Begins to change perceptions of what they can see – not the NZ *everyone* experiences

↑ **EXPERIENCES**

Showcases the range of activities that are available in one trip – of which there are many!

NATURE & LANDSCAPES

Big, dramatic & different to what they see at home. Caravan easily moving between beautiful scenes

PEOPLE & CULTURE

Maori culture, not as obvious & less of draw card vs. to authentic real encounters with the people

ACTIVITIES & EVENTS

Perception there would be plenty to do, and worth the trip no matter the weather

HISTORY & ARCHITECTURE

Less obvious mention of architecture or history in video. Images of nature look new & fresh

A HOLIDAY THAT’S ABOUT ORGANISED ACTIVITIES



But our new TNZ is taking it in a positive direction that has an edge... it's definitely an improvement

IN THEIR OWN WORDS

"I like that one more – it just feels more premium and like a better trip"

"You forget that it's winter... the feeling is warm and everybody is doing stuff"

"It feels like, relative to here, everything I might want to do is really close"

WHAT THEY LIKE

IMAGERY – more modern & breath taking drone shots that show unique experiences

TONE & PACE VIDEO – better tempo, with more panning shots of environment which made it easier to understand

DIVERSITY OF ACTIVITIES IN A SMALL AREA – made it value for money whilst still being possible in a 7 – 10 day holiday

WHAT THEY LIKE LESS

MAP ICON ROTATION – Too quick for some who would want to click through to learn more on digital site

SUB-TITLES – preference to have a narrator to tell the story rather than reading as distracts away from the imagery

MORE F&B – food is relaxing & luxurious so would hope to make more of this in video

Maintaining & Shifting four measures that matter most

 <p>EASE</p>	 <p>WEATHER</p>	 <p>WISH LIST</p>	 <p>EXPERIENCES</p>
<p>The info graphic that illustrates distances goes one step further to make the planning easier</p>	<p>It almost begins to promote winter weather as something that enhances the experience!</p>	<p>Reframes NZ as more exciting place to visit, with high energy – not what they expect</p>	<p>Again showcases diverse range of activities that are available in one trip – something for everyone</p>

<p>NATURE & LANDSCAPES</p>	<p>PEOPLE & CULTURE</p>	<p>ACTIVITIES & EVENTS</p>	<p>HISTORY & ARCHITECTURE</p>
<p>Imagery of volcanic & geothermal activity is considered very different. Outdoor hot pools consistently came up</p>	<p>Maori performance more obvious experience for native culture</p>	<p>The number of experiences featured and the ability to do them all as part of an itinerary really well liked</p>	<p>Not as prominent in the video – definitely space to talk more overtly to interactions with Kiwis in towns</p>
<p>A HOLIDAY THAT'S ABOUT UNIQUE EXPERIENCES</p>			

Continuing to show diverse activities including world class F&B will improve our campaign further

CONTENT OF VIDEO

- **MORE FOOD** – esp. local food and wine. Showcasing world class is important as this is in line with Aus expectations
- **LESS SNOW** – more like a holiday than a ski trip, especially important for non-skiers & those from Brisbane
- **BREADTH OF ACTIVITIES** – fishing, paragliding, diving. Hobbiton for many was felt to be missing & would add uniqueness to NZ & the N. Island
- **DIFFERENT TRAVELLER TYPES** – many Active Boomers & families felt the video targeted Independent Professionals. The images can lack relevancy for them
- **EVENTS** – whether this is a sporting event or something more cultural like a concert or festival Aussies are interested to attend a 'must do' experience in May – Oct

EXECUTION – TONE

- **AUTHENTIC MAORI** – there is a balance to strike between obviously Maori but not like it's a performance. Many felt the Marae looked like a visitors centre
- **DIVERSITY OF ACTIVITIES BUT NOT TOO FAST** – there is a balance between lots of shots to cue variety but slow panning shots to create a feeling relaxation. Some felt removing a couple of activities would help. Contrast between activities experienced is essential.
- **MUSIC IS IMPORTANT** – key to showcase energy and create excitement, which subsequently translated into urgency to book now
- **PEOPLE IN THE SHOT IS KEY** – groups enjoying the experience together frames up who we are talking to and the type of holiday they can expect. Not just couples or young people so that we widen our reach

An aerial photograph of a vast landscape. A winding river flows through a dense field of white, fluffy clouds. The sky above is a clear, deep blue with some light rays emanating from the top center. The overall scene is bright and expansive.

Strategy & Recommendations



How to win the Australian market between May – October

1

Make it feel like it's worth the trip (e.g. the focus needs to be on activities)

2

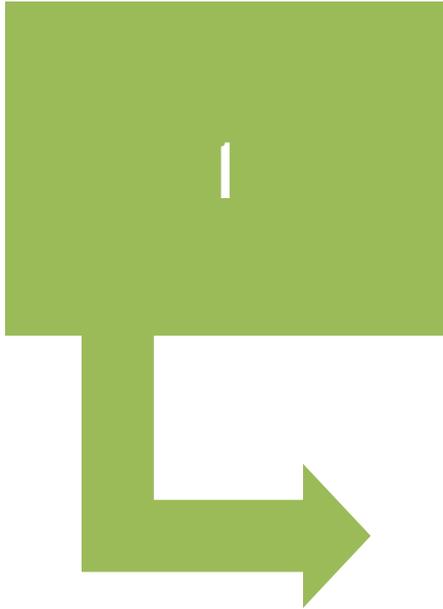
Build the desire to come to NZ off peak through itineraries

3

Grow the awareness of New Zealand Off Peak with our new campaign



Providing experiences which enable Aussies to connect and feel like they are discovering the real NZ themselves



Deliver to the core need of real discovery by having lots of activities to choose from so that they can seamlessly move from one experience to the next. This creates the feeling they don't need to make a route because they are discovering like a local... on their own terms (whilst still presenting options to reassure them the trip is worth it)

It's not about the weather, it's about reassurance there are lots of different activities (not just ski) where they can meet locals, at a time of year they aren't ordinarily thinking of us



Developing itineraries that start with a car rental pick up in Auckland, having flown in direct

2



Given the desire to self drive and chart their own route, developing set itineraries that show the possibilities of day trips (and tell Aussies), widen our relevance beyond 'just cities' & 'Auckland'. They do the thinking whilst allowing control over where Aussies go

We become an integral part of each trip of the North Island, rather than being an optional extra. We provide options whilst also delivering the feeling of freedom they seek



Our existing execution will move us along as it re-positions our offering as much more than what Aussies' expect

3



Showing a series of different experiences in a high energy sequence, where activities are contrasted to show the variety available delivers to the outdoor, nature based trip Aussies hope of NZ. It also opens up the possibility of NZ outside of peak which creates an urgency to come now, rather than waiting

The North Island Campaign is able to move outside of the existing associations and authentically deliver to an outdoor holiday even off peak, which prompts re-consideration



There is an opportunity to develop our campaign further by including F&B more prominently

SHOWING MORE F&B SCENES AS PART OF A WIDER F&B STORY FOR NZ

- To increase the prominence and number of experiences featuring F&B

SHOWING A DIVERSE VARIETY OF F&B CHOICES

- To show a range of different types of experiences, from fine dining to café food so that it talks to consistency across the N. Island

SHOWING A MAP OF PLACES TO GO WHERE YOU CAN EXPERIENCE LOCAL DELICACIES

- To create specialty areas so that F&B experiences become part of the itinerary of what to do off peak



AND WHAT WILL A F&B STORY ADD? This would not only build a greater variety in activities to further broaden the N. Island's relevance to Aussies off peak, but also create a compelling reason to visit the regions, which Aussies can discover themselves



THIS HAS BEEN A BIG PICTURE PRESENTATION ...

Big Picture believes the best opportunities come from rich, actionable consumer insights that are woven into smart and successful business outcomes. We're dedicated to injecting the customer experience into the organisational bloodstream of our client partners