

INCREASING CONSIDERATION OF THE CHINESE MARKET... INTO WINTER

Prepared for AIAL
By Big Picture 2018





The how & the who



Our key business objective was to understand how we can unlock NZ Winter for US travellers to maximise visitation and develop the most compelling Winter proposition

8 IN MARKET FOCUS GROUPS &
16 IN DEPTH INTERVIEWS: **CONSUMERS**

OLDER 4 Groups & 8 Depths with consumers who **HAVE & HAVE NOT BEEN** to NZ:

- 46-65 years of age
- Skew higher HHI \$100K+, include HHI \$75K with families
- Travelled to NZ within last 3 years / Considering or booked an NZ in next 12-24 months
- Aim to have majority travelled to NZ in shoulder and winter months

YOUNGER 4 Groups & 8 Depths with consumers who **HAVE & HAVE NOT BEEN** to NZ:

- 28-45 years of age
- Skew higher HHI \$100K+, include HHI \$75K with families
- Travelled to NZ within last 3 years / Considering or booked an NZ in next 12-24 months
- Aim to have majority travelled to NZ in shoulder and winter months

PLUS
8 B2B INTERVIEWS: **TRAVEL AGENTS**

- Travel partners were recruited by our partner agency
- Mix of those who regularly promote and book NZ package holidays and those who book FIT travel. Mix of those who have & have not been to NZ



Setting the scene for China – The fast 5

1.

CHINESE ARE STATUS DRIVEN – constantly thinking about how they compare to others, they often assume the world thinks they're behind & undeveloped. It's a hangover from their communist past

SO WHAT? Ensure we are positioned as a destination that Chinese aspire to visit

2.

CHINESE LOVE CUISINE. NOT JUST LIKE IT BUT LOVE IT – when you can't talk about religion, politics or current affairs at the dinner table, food becomes a way of expressing expertise and discovering the world that you share with others

SO WHAT? Don't hide the food when selling NZ. It's an important evaluative criteria

3.

CHINESE USE PHONES MORE THAN ANYONE ELSE ON THE PLANET – WeChat is completely changing how Chinese interact & share with each other & the world day to day

SO WHAT? They're constantly online, using WeChat. *Everything* needs to be available on mobile

4.

FAMILY IS IMPORTANT TO EVERYONE – responsibility for young to look after old and the responsibility for old to look after grandchildren is not optional – strong sense of obligation

SO WHAT? Travelling doesn't come with the same freedoms vs. other markets

5.

CHINESE ARE IN A RACE FOR LIFE – overpopulation and limited opportunities means they have a work hard at all costs mentality. They find it hard to switch off in their home environment, which is why leaving the country is so appealing

SO WHAT? They seek a place that represents the opposite of what they experience at home



**WHAT DIFFERENCES DID WE FIND
BETWEEN CITIES & LIFE-STAGES?**



SHANGHAI – LOOKING OUT IN ASPIRATION TO THE WEST

- **A CITY THAT SEES THEMSELVES AS MORE PROGRESSIVE** – they get inspiration from Europe and think they are better than the rest of China because they appreciate fashion, style and culture
- **A LIFESTYLE WHERE SHOPPING AND THINGS DEFINE YOU** – it's less about the act of shopping & more about what it represents to people around you. Think: designer handbags & trainers... how they make you look is key
- **PEOPLE THAT CAN OVERLOOK THEIR FELLOW COUNTRYMEN** – because Shanghainese are looking out towards Europe they often see the rest of China as unsophisticated, behind & under them so can view what other Chinese do as inferior

SO: NZ is often a destination that only appears on the wish list *after* they have visited the top EU destinations

SO: when shopping for travel they want to know the destinations have iconic, social currency too – premium brands that have kudos

SO: we are competing more strongly against other international, rather than domestic destinations

SHENZHEN – OPEN TO THE NEW

- **A CITY THAT HAS FEW TO CALL IT HOME** – fastest growing city in China with a booming technology industry, which attracts Chinese from across the mainland. There is also a great influence by Shenzhen's proximity to SE Asia and Hong Kong

SO: there's a lot of domestic travel happening. A lot of travel starts in Asia before moving out. NZ starts to feel closer as a result

- **A LIFESTYLE WHERE NEW COEXISTS WITH OLD** – it's part of the rapid development of Shenzhen where rich exists besides poor, old besides new because it's growing. It's a Tier 1 city that still has aspects that are Tier 2 – something that gives the city a real buzz

SO: they are more comfortable with not needing to be super luxurious, which informs their accommodation choices when abroad

- **PEOPLE WHO ARE MORE INTREPID** – those who reside in the city tend to travel to Shenzhen for work. As such they are natural travellers who have typically ticked off Thailand, Laos & Vietnam. They are attracted to active (relatively speaking) & nature

SO: classic version of NZ resonated more strongly with this group. They're not looking for the hotels & Louis Vuttons of the world

CHENDGU – LAID BACK & LIVE LIFE AT A SLOWER PACE

- **A CITY THAT'S BEEN THROUGH MAJOR CHANGE -** construction post earthquake has created an environment where new buildings and transition in Chengdu are at large. The city is growing and Chengdu is becoming more ambitious as a result

SO: they have an attitude where they live for the now. They are less concerned with saving money, instead looking to experience today

- **A LIFESTYLE THAT'S A SLOWER PACE -** they are purposefully slower so work less and are less concerned about saving money vs. rest of China. They are known for really good food (Sichuan cuisine) so they consciously take time to enjoy the important things in life

SO: Chengdu-ites tend to be more flexible (relatively speaking vs. rest of China) when it comes to what and how they travel

- **PEOPLE THAT LIVE FOR TODAY (BECAUSE YOU DON'T KNOW WHAT'S ROUND THE CORNER)-** they have realised there's more to life than worrying too much about getting ahead so are greater proponents of living and being happy with what they have today

SO: they tend to be more spontaneous and free when they are away, rather than being as diligently planned. They see themselves as more resourceful

BEIJING – PROUD TO BE CHINESE & OF WHERE THEY ARE FROM

- **A CITY THAT HAS ORDER IN BUSYNESS** – despite the hectic traffic everyone abides by rules. Cycle pathways are cornered off and there is greater respect to do what you are told despite the huge numbers of people that live in Beijing

SO: despite the fact Beijingers are well travelled, they are not as intrepid or so prefer to be guided than explore daringly themselves

- **A LIFESTYLE THAT LIVES ITS HISTORY** – Chinese civilisation is one of the oldest in the world, where customs and cultural practices all have place & meaning. Beijingers are learned and confident in their own view of the world

SO: Beijingers will respond positively to being acknowledged as important & not being seen as the same as the rest of China

- **PEOPLE THAT ARE DEFINED BY WHAT THEY DO & WHERE THEY APPEAR (IN THE HIERARCHY)** – ‘big people’ live in Beijing – there’s status that comes from knowing that you are living in the same city as political greatness (with communism as the backdrop)

SO: Beijingers are drawn to exclusivity of experiences (vs. luxury Western brands of things) when on holiday



Life stage determines how you are expected to act & behave in China – each stage comes with different freedoms

INDEPENDENT PROFESSIONALS



DINKS

ALL ABOUT WORK - less flexible with A/L allowance

APPEARANCE IS EVERYTHING - to be seen as successful

Free from family obligation but tied to work



NEW PARENTS

LIFE SHIFTS TO CENTRE AROUND THE CHILD - devoted to their kids

MORE DEPENDENCE ON OWN PARENTS - welcome of parents' involvement

Lots of family obligation but and still need to work



SLOWING DOWN

EXPECTATION TO SLOW DOWN - nearing or just retired, become less busy

DESIRE TO NOT MISS OUT - urgency to enjoy life as they have free time

Less family obligation & less tied to work



NEW GRANDPARENTS

FAMILY BECOMES SOLE PURPOSE - life centres around 'us', not 'me'

OBLIGATION AS GRANDPARENT - not a question of if, but when

Lots of obligation but no work

SO: Slowing down Active Boomers are in a sweet spot - they're most free when it comes to travelling when & how they want. Others all come with work & family commitments to overcome



No matter your age technology is part of the DNA of what it means to be Chinese

“When we travel we are always on WeChat as it helps ensure we have the best time possible by hearing other people’s recommendations”

“I use WeChat for ideas and for inspiration. I then can confirm planning details with friends through WeChat to book the trip”



- **CHINESE ATTITUDES & USE OF TECHNOLOGY IS DIFFERENT TO THE WEST** – it is an integral part of communication and is seen to add to cultural practice, rather than detract from it
- **WECHAT IS MUCH MORE THAN A MESSAGING SERVICE** – with **over a billion registrations** (600 million monthly users) WeChat is a trusted platform to chat, share and pay as part of a one to one relationship for all of China
- **PART OF IT’S UNIQUENESS IS APPS WITHIN APPS** – thousands of lightweight apps live inside of WeChat, which seamlessly connects users to information whilst keeping them inside the platform – the outreach of content on WeChat is far reaching

SO: In order to be relevant to Chinese we need to be online, on WeChat and keeping up – we need to embrace technology and harness it’s influence of information and purchasing behaviour so that we don’t get left behind

Let's talk about **BOOKING** a trip...

What are the **KEY FACTORS** Chinese travellers take into consideration & the implication this has for our winter?



Travel agents told us about their involvement...

1.

THEY ACT MORE LIKE SALESMEN - it is less about the relationship they have with their customers long term. Instead they prioritise the individual sell because that is often why customers get them involved

SO WHAT? They respond well to incentives

2.

THEIR VALUE WHEN BOOKING IS FINDING A BETTER DEAL - customers often come to them with a flight price in hand & are using them to find a cheaper ticket. Trade discount is what they leverage... a lot

SO WHAT? Off peak and the dollar benefits is an opportunity

3.

THEY BOOK WHAT IS EASY... AND WHAT THEY HAVE DONE BEFORE (UNLESS ASKED OTHERWISE BY THEIR CUSTOMER) - once they have a formula for trips that works, they are very unlikely to change it

SO WHAT? We need to arm them with proven itineraries

4.

THEY ARE MORE PACKAGE FOCUSED... BECAUSE IT 'GUARANTEES' RESULTS - Travel agents seek the greatest margin. The more they arrange outside of flights & accommodation, the more profit they'll make

SO WHAT? All inclusive is how they and their customers think

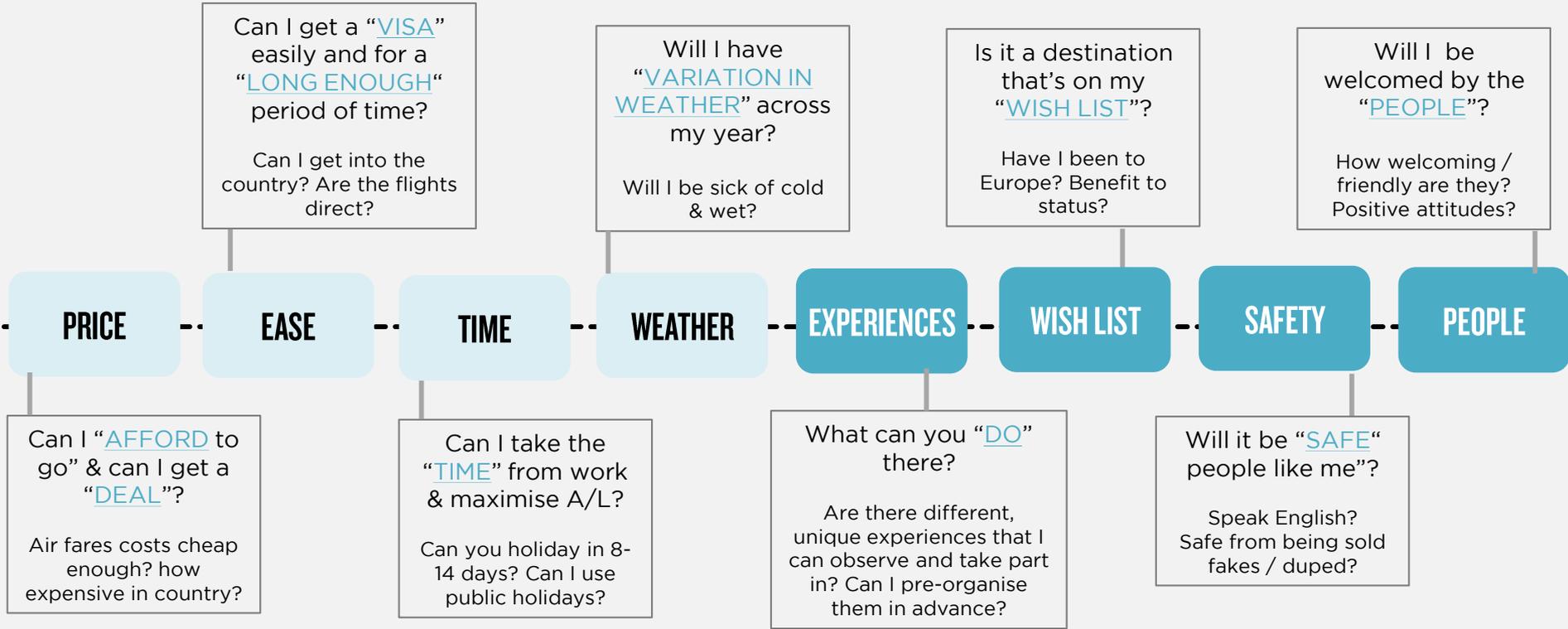
5.

'BIG TOURS' ARE BECOMING 'LOTS OF SMALLER TOURS' (WITH AGENTS ADAPTING TO STAY RELEVANT) - they're still used today despite the shift from group to FIT but have to adjust to new technologies to add value

SO WHAT? We need to provide a technology savvy option to aid TAs with sales



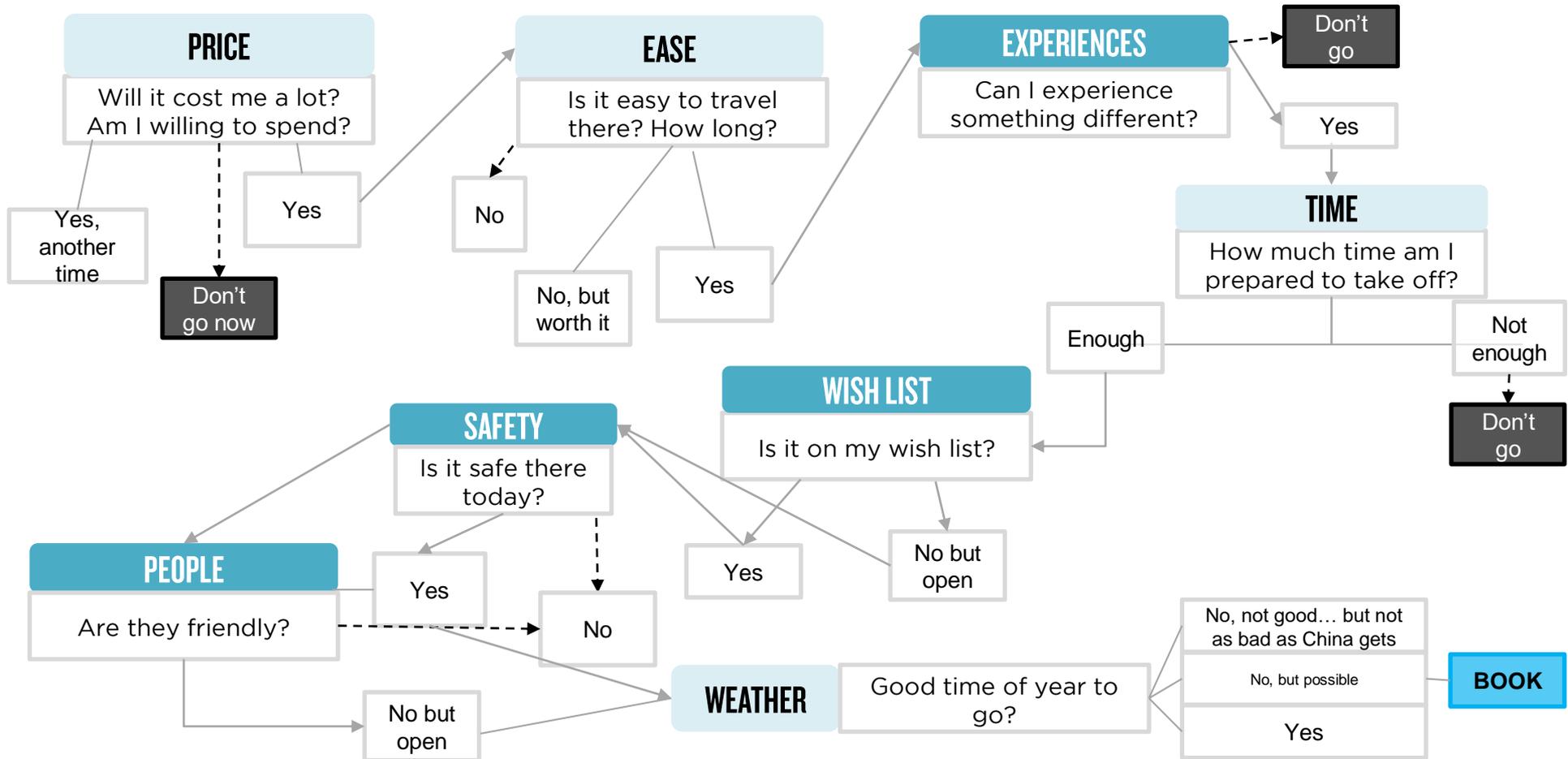
Consumers told us that these are their key considerations...

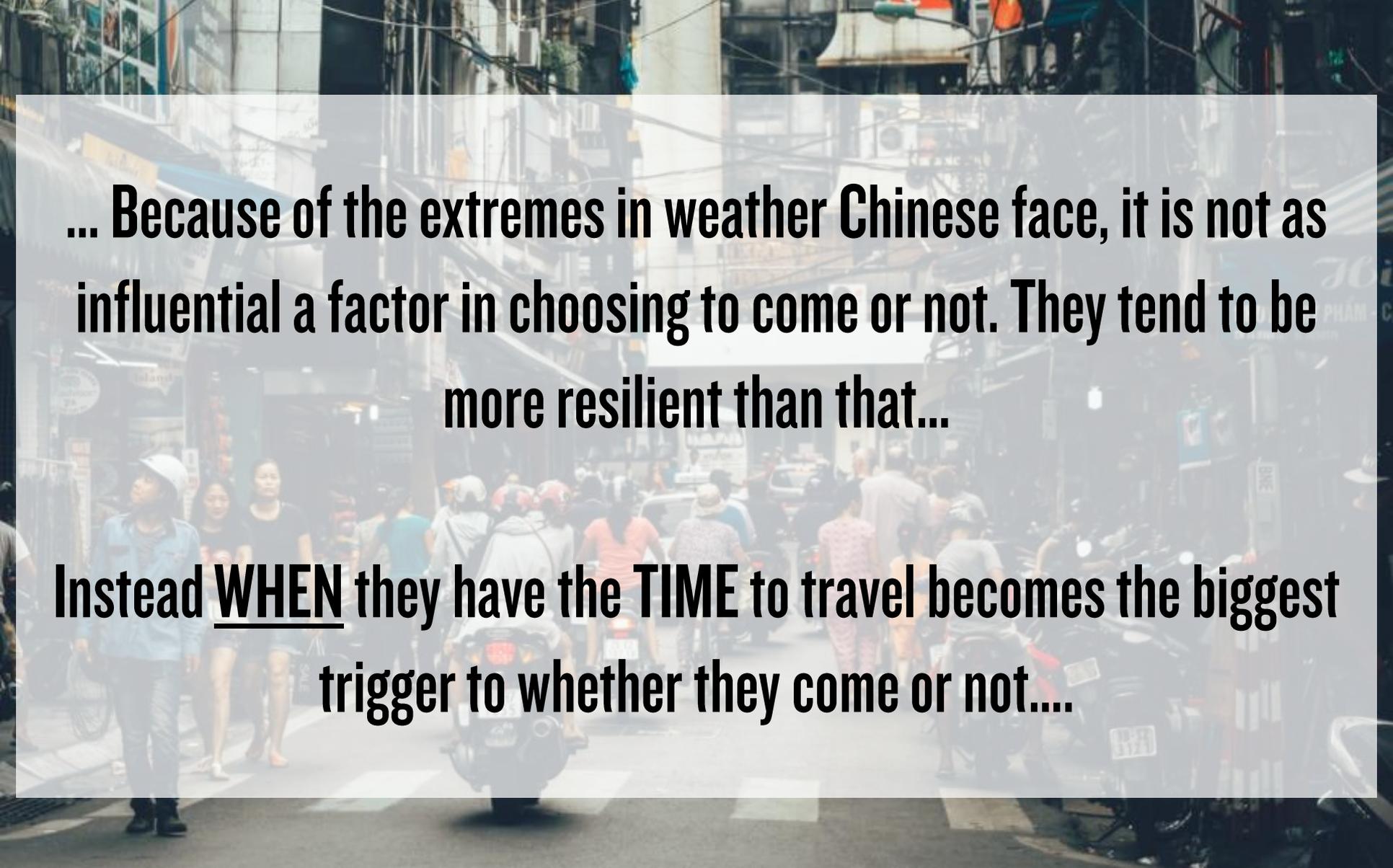


PHYSICALLY AVAILABLE CONSIDERATIONS

MENTALLY AVAILABLE CONSIDERATIONS

Practical considerations come before emotional considerations when planning a trip, with TIME being the veto lever



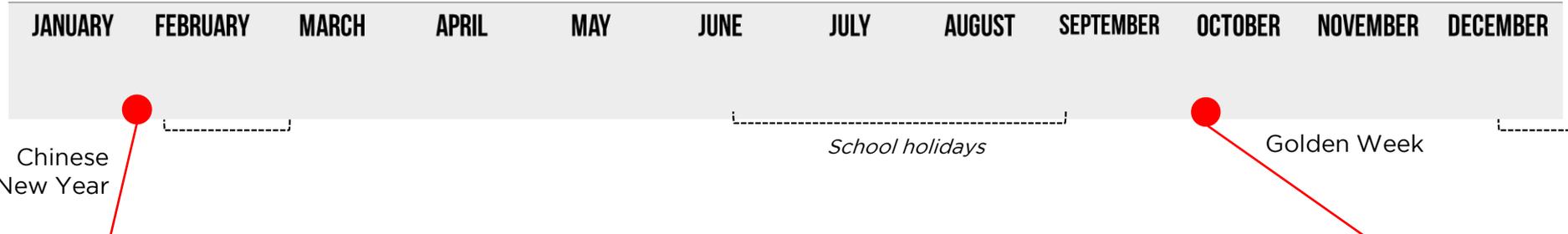


... Because of the extremes in weather Chinese face, it is not as influential a factor in choosing to come or not. They tend to be more resilient than that...

Instead WHEN they have the TIME to travel becomes the biggest trigger to whether they come or not....



There's a lot going on in the Chinese calendar that influences when DINKS & NEW PARENTS can & choose to travel



1 WEEK WHERE ALL OFFICES SHUT

State holiday where all working Chinese are able to take time off 'guilt free' as everyone in China is. As life is dominated by work, it is time they can justify to take off



AN OPPORTUNITY TO GO FURTHER

For younger professionals there is less flexibility to take leave so Chinese NYE & Golden Week represent 'free time'. The further you go away, the more impressive it appears



SCHOOL HOLIDAYS = DOMESTIC

The busyness of airports can mean domestic travel during these months especially around Jan /Feb. However, domestic travel is getting more expensive so this trend is changing



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: DINKS are looking to travel internationally during our summer (Jan/Feb & Oct) meaning we need to show how much they can do even in an 8 day break so that they come between June & September. For NEW PARENTS WITH KIDS focus on school holidays - either way it needs to be easy to convince them



SLOWING DOWN ACTIVE BOOMERS are less restricted by work commitments so are often travelling to NZ in the shoulder season



SLOWING DOWN ACTIVE BOOMERS ACTIVELY AVOID PEAK TIMES...

Look outside of national holidays when travelling with peers who are no longer bound by work schedules. Primarily reduced congestion and better flight deals



NEW GRANDPARENTS TEND TO BE RESTRICTED TO CHILDREN & GRANDCHILDREN SCHEDULES

If they are going as part of a cross-generation trip together they are likely to go in school holidays and when fares are cheaper as they travel as a larger family group

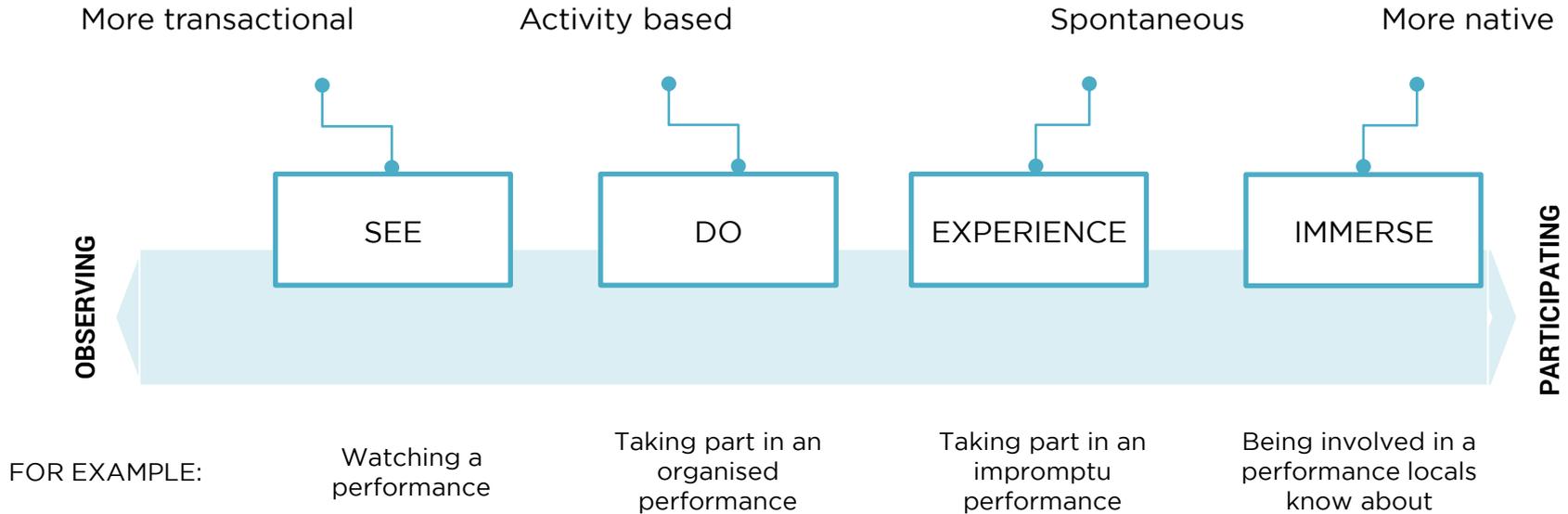
IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: SLOWING DOWN & NEW GRANDPARENT ABS are an easier target as they are looking to travel in our SHOULDER & WINTER SEASON. There is opportunity to extend their 'off peak travel' window beyond Spring & Autumn by showing what they will be gaining i.e. off peak benefits, 'VIP traveller' status

An aerial photograph of a vast landscape under a bright blue sky. The foreground and middle ground are filled with numerous small, white, fluffy clouds. Below the clouds, a winding road or path is visible, curving through the terrain. The overall scene is bright and clear, suggesting a sunny day.

How **INVOLVED** do Chinese travellers like to be when they travel...?

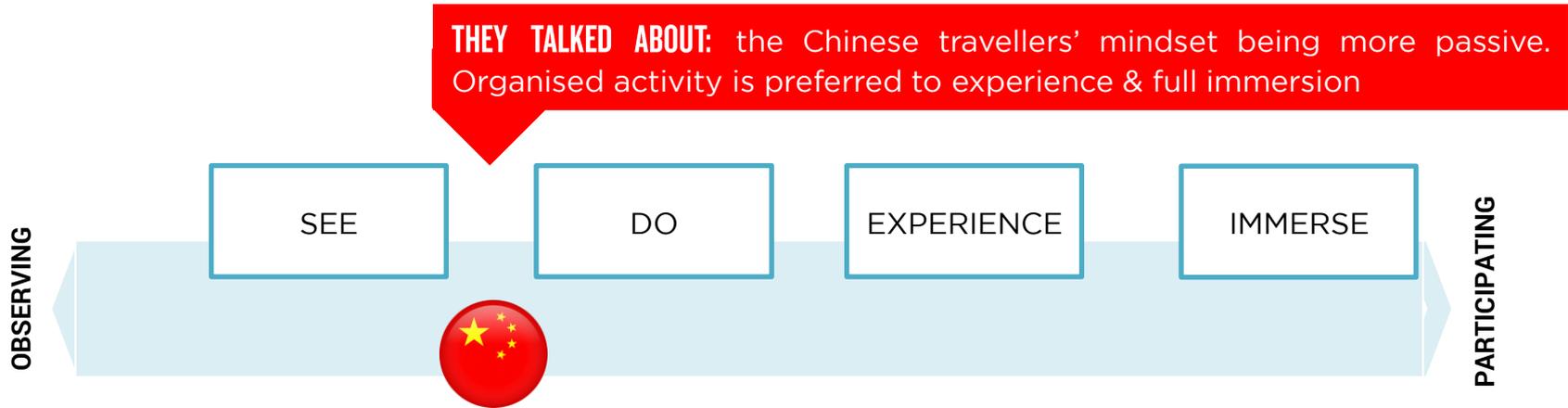


All travellers can be plotted on a spectrum of how they like to experience when they travel





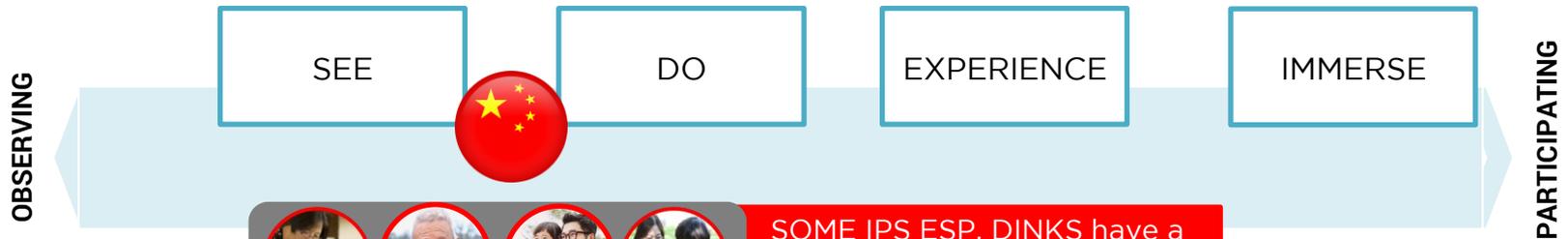
Despite the growing trend from package to FIT in China, it's not as big a step change as what we like to think



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: BUNDLES OF EXPERIENCES, where travellers can select the activities they want to experience, makes them feel involved & provides security they can still EXPERIENCE WITHIN THEIR COMFORT ZONE. Arguably more important in NZ Winter, where they assume there won't be as much to do



Younger Independent professionals & Emerging Tier I cities desire more involvement when it comes to travelling (relatively speaking)



SOME IPS ESP. DINKS have a level of intrepidness not too dissimilar to other markets

BEIJING - in many ways fit the bill of how we see the Chinese travellers



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: We need to develop specific WINTER ITINERARIES that play to the differences between age & city with what they like to do

An aerial photograph of a vast landscape. A winding river flows through a dense forest of white flowers, likely tulips, which stretch towards the horizon. The sky is a clear, bright blue. The text is overlaid on a semi-transparent white rectangular box in the upper middle of the image.

What do Chinese travellers want to DO when they travel?



Across the groups we found when exploring what people want to do on their trip, we found they could always be put into one of these four buckets...



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: The more we are known for being a place that delivers across these four buckets, the greater the chance we have of offering them something they want to do in their holiday. This is especially true in NZ winter when nature & landscapes are not at their best



F&B is an activity like no other in China – eating is a celebrated part of how they define themselves



“In NZ they have the very fresh lamb chops which are very good quality and an experience I want to have”

“Fish is caught fresh in the morning and prepared. It was a highlight of our trip”



- **CUSINE IS AN EXPERIENCE THAT ENABLES CHINESE TO DISCOVER** – it provides variation and safe experimentation whilst also feeling like a treat because the act of eating is comforting
- **IT’S A SAFE TOPIC OF CONVERSATION** – once politics, work and social issues are taken off the table for discussion in communist China, talking about food is a way of connecting over shared experience
- **FRESHNESS OF FOOD IS A SIGN OF GOODNESS** – the closer Chinese are to the source of good food, the better the quality (much more prevalent in Beijing & Chengdu as land locked cities)

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: Experiencing a type of food is reason enough to visit a region and go the extra in the minds’ of Chinese. Developing a clear F&B story for our off peak proposition will create a compelling reason to come now



There are different city & life-stage preferences with what they want to do that informs what they look for in their holiday





How do they want to FEEL when they travel?



They seek a feeling of carefree – the opposite to how they describe living in China

NOT OUR KIWI VERSION OF CAREFREE

IT'S NOT FREEDOM WHERE THEY LACK INHIBITIONS

Chinese are not looking to radically distance themselves from the ingrained expectations and social norms of China....it's not about disconnecting from their phone



BUT A NUANCED CHINESE VERSION

IT'S GETTING AWAY FROM THEIR ROUTINE

In a culture that is wound so tight, carefree is a case of letting go so that you can unashamedly leave a world that can feel restrictive. It is about physically & easily leaving China

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: Travelling off peak / NZ Winter cannot feel difficult because that takes us further away from the feeling of carefree

What do they **KNOW**
ABOUT NZ that
influences whether or
not they come for a
holiday?

A woman with long dark hair is seen from the side, looking out of a car window. She is holding a pen and looking at a document. The background is dark, suggesting it might be nighttime or in a dimly lit area. The car's interior and window frame are visible.



Travel Agents who **HAVE BEEN** to NZ sell it harder by leveraging **KNOWN**, existing associations

1.

THEY SEE NZ AS A CLEAN DESTINATION - which gives it wide appeal across a range of different traveller types - 'healthy and pure' are good for everyone

2.

NEW ZEALAND IS A SMALL PLACE - the idea of being away from crowds and the stresses of big city life is primarily how Chinese travellers relax, so is seen as a real selling point

3.

THEY PRIMARILY PROMOTE NATURE BECAUSE IT IS SO DIFFERENT FROM WHAT THEY HAVE IN CHINESE CITIES - they talk about the untouched nature and ways Chinese can experience it... walks through parks that are real, rather than curated and aesthetic

4.

NZ HAS ENOUGH TO OFFER TO MAKE CHINESE COMFORTABLE - they typically reassure them that there is Chinese food available in the bigger cities and that driving is not that hard

5.

BUT ACCOMMODATION OPTIONS ARE LIMITED - especially for big package tour groups, finding decent options to accommodate large groups can still be a struggle esp. 'on' season

THOSE WHO
HAVEN'T
BEEN SEE
THEMSELVES
MORE LIKE
SALES
PEOPLE SO
ARE
CONFIDENT
THEY CAN
SELL NZ....

...THEY JUST
TEND TO
REVERT TO
THE LITTLE
THEY KNOW
ABOUT IT...

NATURE &
NEAR AUS



Travel agents are creating digital content themselves to lean on technology and what they KNOW about Chinese needs when selling NZ



- **THEY UNDERSTAND THE POWER OF VIDEO** – not only do Chinese travellers want to know what they can do but they are looking to see exactly how they can experience NZ
- **THERE'S VALUE IN SPEAKING THE SAME LANGUAGE** – they know Chinese travellers respond best to visual communication and gather ideas before engaging them on WeChat
- **PACE OF THE VIDEO IS IMPORTANT** – there needs to be a balance between seeing and doing so that Chinese travellers meander through, rather than rush

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: Not only do we need to develop compelling content tailored for the Chinese market, we need to utilise existing WeChat platforms to share it with them, rather than waiting for Chinese to discover it themselves



Across the board, there is more **KNOWN** about the South than the North Island... & as such the North Island struggles to get a look in

AUCKLAND
VFR

ROTORUA
Geothermal

HOBBITON / WAITOMO
LOTR / Caves



Stronger associations with
ACTIVITIES

Stronger association with
BEAUTY & NATURE

MORE BEAUTIFUL
Nature's more impressive

CHRISTCHURCH
Earthquakes

QUEENSTOWN
Mountains, bungee

MILFORD SOUND
Lakes

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: We have a city and activities that we are famous for on the N. Island but they don't yet build a unique NZ experience. We need a more nature and landscape focus



They **KNOW** there is a growing Chinese community in NZ and an increasingly popular holiday destination for Chinese

FAMILY MEMBERS WHO ARE STUDYING HERE

At least one mention of nieces or cousins or other close relatives who were at the universities in NZ per group!

This acts as a compelling trigger to visit - having a local to help plan and share in the trip

FRIENDS OF FRIENDS WHO HAVE BEEN HERE

We know WOM through WeChat is hugely influential for VFR. It's how travellers connect & liaise their trips as well as show their experiences to family afterwards.

Everyone knew of someone in their friendship circle who has / is booked to go to NZ



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: VFR offers a great opportunity to give people a reason to come no matter the season, and as such warrants it's own strategy (primarily using the WeChat platform) just as we have for Australia



Chinese travellers who HAVEN'T been to NZ know we're 'clean'



"My friends say that the sky is so blue and the air is very clean. It is not polluted like China"

"I look to get away from the busyness of city living so NZ, being all nature, is high on my list"

"There is Hobbiton and a lot of the scenery from the films"

"Family say that New Zealand welcomes Chinese tourists. And that you can find Chinese food"

PURITY OF AIR

The lack of air pollution and the health benefits of NZ are widely known

NATURAL SCENERY

There is an assumption that our surroundings are natural and real vs. artificially created compared to parts of China

NEAR AUSTRALIA

Small cousin near Australia often springs to mind - often bundled together as 'Southern Hemisphere'

LOTR

For those familiar with the films, LOTR and Hobbiton come up spontaneously. The idea of a natural film set appeals greatly

ACCEPTING OF CHINESE

Not so much that Kiwis are friendly, just that they are not not friendly

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: We need to leverage existing perceptions of NZ in a way that promotes coming in Winter. Think: crispness of the air, snow capped mountain backdrops, warm & welcoming settings that contrast to busy & congested



For those that HAVE been, we exceed their already high expectations



“The colours are so vivid. Every turn was a new photograph to see and experience. My photos could only capture some of the beauty I saw”

“Hobbiton is a real village that you can visit and touch. It is quite amazing”

“We only went to NZ for a couple of days on our trip. We are planning to go back for 2.5 weeks next year”

“I was holding a map and a local asked if I needed help. New Zealanders stop and help you”

PURITY OF AIR

PARADISE

Air and pure environment that they cannot experience back in China... unless they go to Tibet

NATURAL SCENERY

... THAT YOU CAN TOUCH

Natural landscape that you can drive past, walk through & see up close for yourself that you don't pay through the nose for

NEAR AUSTRALIA

COUNTRY IN IT'S OWN RIGHT

Not just an add on to Aussie but a place worthy of it's own dedicated trip

LOTR

AS GOOD AS THE PICTURES

Nature so epic that every corner offers a photo opportunity that enables them to share & communicate back to China

ACCEPTING OF CHINESE

SO FRIENDLY & WELCOMING

An openness where Chinese do not feel singled out but actively helped if they appear to be struggling

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: knowing it looks as good as it does in pictures no matter the season is important for Chinese travellers to seek to replicate photo moments they have seen online



The core reason to visit NZ is our nature and landscapes... that are in strong contrast to what they see in their daily lives



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: Off peak offers an opportunity to broaden what visitors expect they can experience in NZ because they can have a holiday that is not just set in nature, e.g. itineraries that push them towards less weather dependent options such as wineries, food tours, Maori culture, geothermal



NZ AS A DESTINATION struggles. They see NZ as a place where there will be lots to do, they will be welcomed and safe. But as we are perceived as expensive and needing time to visit, & low on their wish list, we often lose out

PRICE

EASE

TIME

WEATHER

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: no matter the seasons, we need to convince Chinese that they can do so much more in a NZ holiday than they think they can so that travelling to us warrants the price tag



What do they think NZ Winter will be like?



The short answer... they don't really think about a NZ Winter

FOR THOSE WHO'VE BEEN

“It was **temperate** when we were travelling through the South Island during winter. **Not as cold as Beijing** gets during January but cold enough for you to need a jacket and layers”

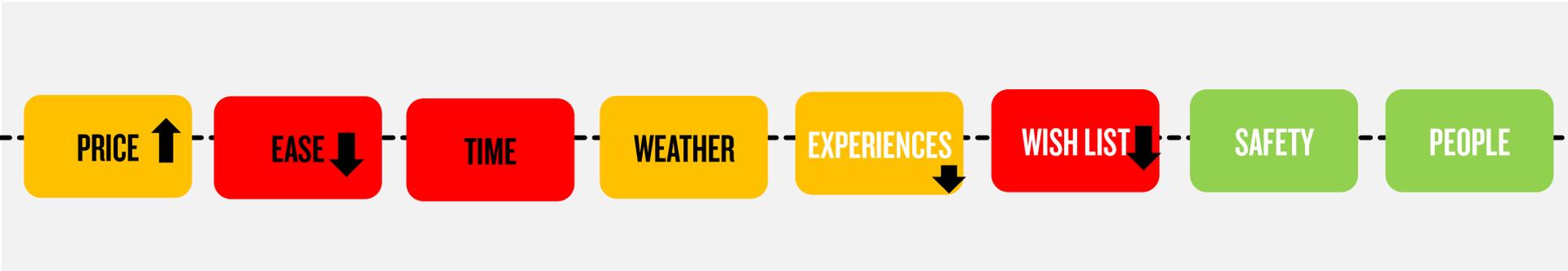
THOSE WHO HAVEN'T BEEN

“It is close to Antarctic... but then again next door to Australia? I'm not sure. In China it gets very cold so I **would imagine they have some snow and ice** in New Zealand during the Winter months”

IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: Our Winter in NZ is more like Spring / Autumn of China. It is the IDEA OF GOING FROM BACK TO BACK WINTER (and missing a summer) that is off putting, not the low temperatures. Showing 'summer' experiences convinces them they won't miss out. THINK: white wine & fresh seafood with a coastal view



When they consider NZ IN WINTER: activities goes down in their opinion as they don't think there's anything to do. They assume there will be less people in NZ so it'll be less safe, which means it goes down on the wish list (despite cheaper airfares)



IMPLICATION FOR AN OFF PEAK NZ HOLIDAY: The key is to promote our activities. Giving Chinese travellers a whole host of things to do we'll reassure them that there is still SO MUCH to do & that we have the appropriate infrastructure to support lots of people visiting. Activities will have a positive impact on driving ease & wish list dials up



What activities available in NZ winter will get us on the wish list?





When Chinese travellers created their ideal winter break for us it always had an element of nature & activities, but always through a 'seeing' rather than 'doing' lens...

姓名: 王如杰, 何丽琴

以下哪些形容词可以描述新西兰的冬日假期/体验:
(请选出所有适用的)

<input checked="" type="checkbox"/> 充满冒险精神 对事物持开放态度 强化人际互动	<input checked="" type="checkbox"/> 高品质的 让人放松的 适合室内活动	<input checked="" type="checkbox"/> 令人舒适的 悠闲惬意 令人感兴趣的	<input checked="" type="checkbox"/> 可以自由探索 充满活力的 原始天然	<input checked="" type="checkbox"/> 景色优美 富有文化底蕴 适合户外活动
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High quality, comfortable, beautiful scenery, relaxing, energizing, culture-loaded, natural

您会如何为新西兰的冬季旅游来定调:
如: 严肃或疯狂, 现代或传统, 明亮或黑暗

大自然中的, 极尽享受。

Extremely cosy in the nature

什么样的宣传用语可以吸引您在新西兰的冬季去旅游:

生机勃勃的大自然, 感受不一样的冬天

Nature full of life; Experience a different winter

除了上述我们提到的内容, 我们还能做些什么可以吸引您在新西



姓名: 王琴

以下哪些形容词可以描述新西兰的冬日假期/体验:
(请选出所有适用的)

<input checked="" type="checkbox"/> 充满冒险精神 对事物持开放态度 强化人际互动	<input checked="" type="checkbox"/> 高品质的 让人放松的 适合室内活动	<input checked="" type="checkbox"/> 令人舒适的 悠闲惬意 令人感兴趣的	<input checked="" type="checkbox"/> 可以自由探索 充满活力的 原始天然	<input checked="" type="checkbox"/> 景色优美 富有文化底蕴 适合户外活动
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Adventurous, high quality, free to explore, beautiful scenery, relaxing, cozy, energizing, culture-loaded, interaction with people, interesting, natural, good for outdoor activities

您会如何为新西兰的冬季旅游来定调:
如: 严肃或疯狂, 现代或传统, 明亮或黑暗

宁静/旅游/浪漫, 有丰富的可选择可尝试资源
如住宿/租车/景点门票... 有自主选择

NZ's pure and stunning natural beauty are the reasons tourists want to stay or want to come back for more. Blue and green are the two major colour of NZ.



新西兰的冬季去旅游



除了上述我们提到的内容, 我们还能做些什么可以吸引您在新西兰的冬季来旅游:
冬季跟夏季呈现的不同景色, 如冬季可以体验到雪山, 徒步, 温泉等, 星空。

Extremely cosy in the nature



姓名: 熊小玲, 何丽琴

以下哪些形容词可以描述新西兰的冬日假期/体验:
(请选出所有适用的)

<input checked="" type="checkbox"/> 充满冒险精神 对事物持开放态度 强化人际互动	<input checked="" type="checkbox"/> 高品质的 让人放松的 适合室内活动	<input checked="" type="checkbox"/> 令人舒适的 悠闲惬意 令人感兴趣的	<input checked="" type="checkbox"/> 可以自由探索 充满活力的 原始天然	<input checked="" type="checkbox"/> 景色优美 富有文化底蕴 适合户外活动
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Adventurous, high quality, comfortable, free to explore, beautiful scenery, open-minded, relaxing, cozy, energizing, culture-loaded, interesting, natural, good for outdoor activities

您会如何为新西兰的冬季旅游来定调:
如: 严肃或疯狂, 现代或传统, 明亮或黑暗

因为纯净的美景和自然风光, 原始的人文地理, 令人叹为观止, 留恋忘返, 或说想再去的理由。
蓝色和绿色是新西兰的主色调。

Non-peak time, quieter, therefore there are more resources to choose from, such as accommodation, car hire and facilities in the tourist spots

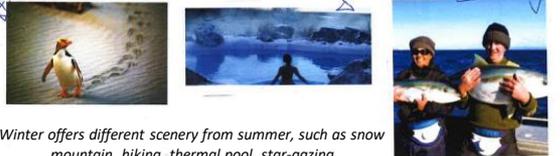
什么样的宣传用语可以吸引您在新西兰的冬季去旅游:

大自然中的极尽享受

Extremely cosy in the nature; Nature full of life

除了上述我们提到的内容, 我们还能做些什么可以吸引您在新西兰的冬季来旅游:

冬季跟夏季呈现的不同景色, 如冬季可以体验到雪山, 徒步, 温泉等, 星空。



Winter offers different scenery from summer, such as snow mountain, hiking, thermal pool, star-gazing



We gave them a look book filled with activities & their reactions were consistent ...

NZ off peak isn't that cold

SELECTION OF IMAGES THAT PROVOKE REACTION



“It is as beautiful as I have heard”

“The images look almost too good to be true. It looks very colourful with the contrast of blue and green despite being winter”

“It looks mild (temperature) compared to what Winter in China is like”

“There are only young people featured really which makes me think I would have to do the trip with my son, rather than with a group of friends”

“It is what you imagine of NZ. Things that are not really possible in China like feeding lambs & seeing these glow worms. It's good as these activities are open all year round”

“It does look like a very active break. I would be more suited to some of the activities that are part of a tour”



Ski might be a part of their off peak holiday but doesn't define the trip... they also actively avoid city living, which mimics what they have at home

THE MOST POLARISING IMAGES OF WINTER



1. **IT'S NOT 100% ACTIVITIES 24/7**– despite the fact that we are an outdoors destination & FIT is growing, the level of activity Chinese like to do is more sedate than other markets.... A walk in a park is enough exploration
2. **IT IS NOT IMMERSIVE**– experiences with Maori and local New Zealanders is cultural but is not always relaxing. Large groups of people signify organised tour = relaxing. One on one interaction is more intensive
3. **SNOW IS PART OF IT, NOT THE ENTIRE EXPERIENCE**– for those who don't ski, seeing and touching snow is enough. For those who do, it is one or two days of the trip, rather than defining their holiday
4. **IT'S NOT CITIES & NIGHT LIFE**– Chinese are looking for the security infrastructure affords but come to us for real, unadulterated nature. Scenes of city life can distract from their reason to come



We need to show defined activities that take place in nature to really start changing the conversation and active consideration of NZ off peak

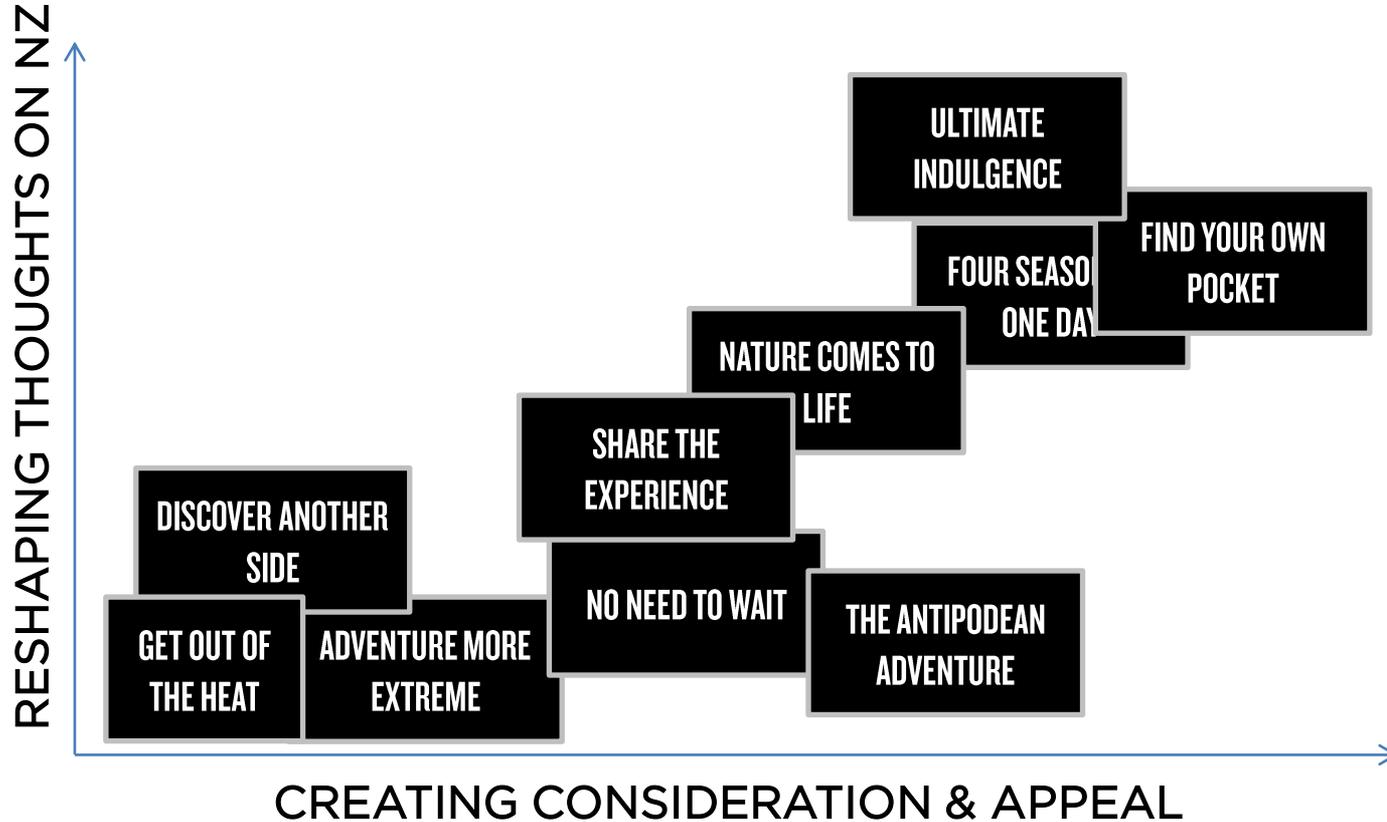
THE TOP PERFORMING IMAGES OF WINTER



1. **SEAFOOD & FISH STRAIGHT FROM THE SEA... EVEN SHOPPING IN SUPERMARKETS** – freshness of the source of cuisine is as important as the end product.
2. **‘DEVELOPEDNESS’** – showing we are small and untouched, without being remote and backwards. Reassurance that there is enough to do and accompanying infrastructure
3. **HOBBITON** – Small like houses that talk to the grandeur and epic LOTR landscapes mean they are attractive even if you haven’t seen the films
4. **HOT SPRINGS / THERMAL BATHS** – rejuvenating experiences that are all about relaxation; they seek to feel ‘better’ & far removed from their city lives
5. **INDIGENOUS ACTIVITIES** – seeing iconic and well known Maori scenes that are something cultural to tick off
6. **WILDLIFE IN THE WILD** – animals they’ve never seen in their real environment talks to purity and freedom



At a glance, this is the job they are doing



An aerial photograph of a landscape. A winding river flows through a valley. A large, bright white cloud formation, possibly a snowfield or a large cloud bank, dominates the middle ground. The sky is a clear, deep blue with some light rays or lens flare effects near the top.

**Which territories struggle to create a compelling reason to
come to NZ off peak?**



Despite the humidity of big city living in CHN, Heat isn't a compelling reason to choose NZ

WINTER IN NEW ZEALAND – GET OUT OF THE HEAT

THE US SUMMER CAN BE HOT, HEAVY AND BOTHERSOME. WITH LITTLE RELIEF FROM THE GLARING SUN, INSTEAD OF BATTLING THE BUSINESS, COME TO LUSH, GREEN NEW ZEALAND AND GIVE YOURSELF RESPIRE.

FROM WATCHING DOLPHINS PLAY FROM A SEA BOAT OFF THE COAST, TO SIMPLY TAKING IN THE VIEW OF THE MIGHTY MITRE PEAK, THE COOL AIR BUT BRIGHT DAYS PROVIDES A REAL BREAK FROM THE HEAT. WALKING THROUGH MOUNTAINS OR ACROSS GLACIERS MEANS YOU CAN RETURN HOME HAVING HAD AN EXPERIENCE MORE DIFFERENT THAN MOST.

ESCAPE TO COOLER CLIMES AND ENJOY AN ADVENTURE IN NZ WINTER



IN THEIR OWN WORDS

“It does get very hot and humid in the city during the summer – that is true”

“I am looking to leave China during these times anyway for the school holidays. It doesn't encourage me to consider NZ”

WHAT THEY LIKE

IT ACTIVELY REFERS TO THE NEED FOR **RELAXATION** – something they all seek for in a holiday so makes encourages dreaming
TALKS TO TRUTH ABOUT DAILY ROUTINE – likes the idea of getting away from the commitments and stresses of work
IMAGERY SHOWS VARIETY – showcases diverse activities that feel obtainable

WHAT THEY LIKE LESS

NOT SPECIFIC TO NEW ZEALAND – doesn't clearly carve out a reason to come to NZ
TONALLY MORE AMBIGUOUS – does not explain what is unique about NZ
PUTS EMPHASIS ON TEMPERATURE OF THE SEASON – creates contrast between heat and cold, which makes winter feel colder than the reality most have experienced

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



As the weather is not that impactful for Chinese, less relevant



Due to negative reaction deprioritised in subsequent cities



Not a story that presents a compelling sales pitch



WINTER IN NEW ZEALAND – NO NEED TO WAIT

NEW ZEALAND IS OPEN COME RAIN OR SHINE TO WELCOME INTREPID TRAVELLERS WHO MAKE IT OVER TO OUR PRECIOUS PART OF THE WORLD.

THE LONGER NIGHTS INVITE MORE BREATH TAKING VIEWS OF THE STARS AT OBSERVATORIES HIGH UP IN THE RANGES. OUR MOUNTAINS DUSTED IN SNOW. ACT AS THE BACKDROP TO RELAXING BOAT TRIPS ACROSS GLACIAL LAKES AND WORLD CLASS VINEYARDS SERVE FRESHLY CAUGHT FISH WITH A GLASS OF SAVIGNON BLANC. WHILST YOU WATCH THE WORLD GO BY.

TAKE IN THE BEST OF WE HAVE TO OFFER. FIRST TIME EVERY TIME WHEN HERE FORNZ'S WINTER



Feels less of an invitation and calls into question why would anyone wait to go

IN THEIR OWN WORDS

“Freshly caught fish sounds delicious. When you live in a city having fresh fish is a real luxury”

“I am planning to go to NZ so I’m not sure why I would be waiting. I am planning and will go as soon as I can”

WHAT THEY LIKE

IT TALKS ABOUT THE BEAUTY ON OFFER – Wine & fresh fish as experiences well liked
THE IDEA OF EXPERIENCING ‘THE BEST’ – travellers like to think they will have an exclusive experience to write home about
IMAGERY SHOWS VARIETY – felt to be inconsistent with the overall tone of the proposition

WHAT THEY LIKE LESS

TONALLY FEELS TOO SPONTANEOUS – implies decision to go to NZ is last minute
CHINESE DON’T SEE THEMSELVES AS WAITING TO GO ANYWHERE – doesn’t resonate as a truth in how they travel
MORE ROMANTIC – interpreted as only really relevant for couples, not families or retirees

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



Tends to confuse, rather than convince as title taken literally



Due to negative reaction deprioritised in subsequent cities



Not a story that presents a compelling sales pitch

WINTER IN NEW ZEALAND – DISCOVER ANOTHER SIDE

THE PEOPLE ARE WHAT MAKE ANY NATION GREAT, AND NEW ZEALAND IS NO EXCEPTION. WHEN YOU VENTURE TO OUR SIDE OF THE EARTH, WE WELCOME YOU IN LIKE WHANAU – OUR FAMILY.

WITHOUT THE HUSTLE AND BUSTLE OF PEAK SEASON, OWNERS OF RESTAURANTS AND LOCALS OF BED & BREAKFASTS MAKE TIME TO SHARE THEIR STORIES. LEARN ABOUT OUR INDIGENOUS MAORI ROOTS, WHICH SHAPE OUR CULTURE TODAY, AND RETURN HOME WITH A NEW PERSPECTIVE.

LIVE LIKE A LOCAL AND GET BEYOND THE SURFACE OF NEW ZEALAND... DISCOVER THE DELIGHTS OF OUR WINTER.



Maori has an element of intrigue, but the language barrier makes it a 'hard' holiday

IN THEIR OWN WORDS

“Maori are very special because they are the native NZ inhabitants. I would like to learn more about their culture and history”

“I don't know how well I will be able to communicate with the locals. I'd like to experience the culture a little but not for the whole trip”

WHAT THEY LIKE

LEARNING ABOUT AN INDIGENOUS CULTURE – Maori is uniquely NZ, which means it is a distinctive experience to do **HISTORY & CULTURE MEANS THEY LEARN SOMETHING** – going back to China with new knowledge contributes to social status **BEING MADE WELCOME** – feeling accepted as an idea really resonates with Chinese

WHAT THEY LIKE LESS

GETTING BEYOND THE SURFACE APPEALS IN PRINCIPLE, BUT IS DIFFICULT PRACTICALLY – concern that they would need to speak English or be put on the spot **NOT AS MUCH INTEREST IN IMMERSION** – watching a show (not taking part) is enough **NOT ENOUGH NATURE** – feels one dimensional as a holiday

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



It feels tiring for the whole holiday to be interacting with others



Due to negative reaction deprioritised in subsequent cities



Feels a harder sell without organised activities

TRAVEL AGENTS

WINTER IN NEW ZEALAND – THE ULTIMATE ANTIPODES ADVENTURE

GETTING AS FAR AWAY FROM THE USA AS YOU CAN, HAS IT'S ADVANTAGES. NOT EVERYONE CAN SAY THEY HAVE EXPERIENCED ALL THE WONDERS THE ANTIPODES HAVE TO OFFER IN ONE ADVENTURE.

WHETHER IT'S AUSTRALIA OR NEW ZEALAND THAT YOU HAVE ALWAYS WANTED TO SEE. BOTH CAN BE TICKED OFF YOUR BUCKET LIST IN ONE TRIP. SEE THE KOONS OF AUSSIE, ROCK, REEF AND SYDNEY OPERA HOUSE BEFORE DISCOVERING THE NATURAL WONDERS OF NEW ZEALAND, MITRE PEAK, REMARKABLE MOUNTAINS AND THE MAGICAL HOBBITON.

DISCOVER THE ANTIPODES WITH AN AUSTRALIAN & NEW ZEALAND HOLIDAY... IT'S WHERE THE INTREPID FIND THEMSELVES



IN THEIR OWN WORDS

“The benefit is I can fly down to Australia and NZ on the same flight cost and see both”

“I have a limited amount of leave so it would feel quite rushed to do both. I would need to do a cruise or tour”

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER

Appeals to those in a package mind set as on the surface it feels greater VFM but is more rushed



WHAT THEY LIKE

THE IDEA OF MAXIMISING TIME AWAY – Experiencing two countries in the space of time others only do one
HEARD GOOD THINGS ABOUT AUS – no need to have to choose between both places which are on the bucket list
AUS IS RELIABLY HOT – expectation that good weather is guaranteed

WHAT THEY LIKE LESS

UNDERSOLLS THE BEAUTY & UNIQUENESS OF NZ – makes NZ less appealing to visit
AUSTRALIA IS PRIORITISED – because it is bigger, they assume it would need more time to experience fully so NZ misses out
DRAWS ATTENTION TO THE SYDNEY OPERA HOUSE – which is a known and desirable icon to get a photo of



Undersells NZ and distracts from enjoying each



Due to negative reaction deprioritised in subsequent cities



Because of the connecting flights, presents more profit



WINTER IN NEW ZEALAND – SHARE IN THE EXPERIENCE TOGETHER

IT IS HARD TO FIND TIME IN THE BUSYNESS OF EVERYDAY LIFE TO SHARE IN EXPERIENCES TOGETHER WITH THOSE AROUND US. COME TO NZ IN WINTER WHERE YOU CAN RECONNECT WITH EACH OTHER AND THE WONDERS OF NATURE.

NZ WINTER IS AT A TIME WHERE TYPICALLY YOU HAVE MORE HOLIDAY DURING THE YEAR. WHY NOT COME TO THIS MAGICAL PART OF THE WORLD WHERE YOU CAN DISCOVER PENGUINS & WHALES, AS WELL AS EXPERIENCE GEOTHERMAL POOLS.

CREATE STORIES TOGETHER, AND THINK WARMLY OF NZ WINTER



Togetherness appeals to couples but can feel generic & doesn't promote unique NZ experiences

IN THEIR OWN WORDS

"I think this one is more about couples on honeymoon because they are sharing a holiday. It is not for older people like me"

"I love the idea of seeing penguins in their natural surroundings. That really stood out as a unique activity."

WHAT THEY LIKE

WONDERS OF NATURE EMPHASISES THE OUTDOORS – positively leverages what they know about NZ
PROMOTING SEEING WILDLIFE IN THE WILD – Penguins are very popular. 'Real' opportunities of seeing them also stand out
TIME WHERE I DO HAVE TIME – factual statements talk to truth about availability

WHAT THEY LIKE LESS

MEMORIES IN CHINESE TRANSLATION MEANS THE PAST, NOT CURRENT – the act of sharing memories was often lost. They share experience when back in China
FEELS ONLY SLOW PACKAGE HOLIDAYS ARE POSSIBLE – talks to large group activities
RELEVANT TO COUPLES – implies the trip is overly romantic

Mental availability

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER

Physical availability



The intimacy of the experience was well liked (younger Chinese)



Felt it had little to do with what NZ uniquely offers



Experience more about those you are with than the place you are in



Not tested in Beijing



Does not clearly communicate why go to NZ



Extreme puts too many on edge as the level of activity makes them uncomfortable

WINTER IN NEW ZEALAND – WHERE THE ADVENTURE BECOMES MORE EXTREME

FOR THOSE WHO RUN ON ADRENALINE AND REVEL IN THE PROMISE OF THE OUTDOORS, NZ'S WINTER OFFERS THE ULTIMATE PLAYGROUND.

FROM WORLD CLASS MOUNTAIN BIKING THROUGH REDWOOD FORESTS, HELI-HIKES ON THE SUMMIT OF STUNNING GLACIERS OR DRIVING FULL THROTTLE UP RIVER BEDS OF GORGES, WHATEVER THE ACTIVITY WINTER MAKES THE JOURNEY MORE THRILLING.

COME SEE FOR YOURSELF AND DISCOVER THE WONDERS OF NZ'S WINTER



IN THEIR OWN WORDS

“I love skiing and I’ve always wanted to bungee. My friends would love this”

“I don’t like the word ‘extreme’ because it makes me feel anxious about what might happen”

“I just don’t see any activities for my age. More suited to young travellers”

WHAT THEY LIKE

THE IDEA OF BUNGEE JUMPING HAS REAL APPEAL – the activity for those interested is uniquely NZ
DISCREET ACTIVITIES TO EXPERIENCE REALLY APPEAL – they could imagine several days’ itineraries with the experiences shown
LIKE THE WORD ADVENTURE – sense of discovery feels quite ‘intrepid’

WHAT THEY LIKE LESS

EXTREME OF ANYTHING IS A REAL TURN OFF – travellers like a measured form of experience... rather than too much of activity outside of their comfort zone
SKIING IS NICHE – does not have wide spread appeal. Most happy to just see snow
NOT MANY PEOPLE AROUND – activities can appear remote & far away from others

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



More focussed on outdoors, rather than luxury



Better appeal with nature enthusiasts



Appeal to young but not enough diversity for others



Skiing more appealing as this is more common in N. China



Activities are easy to ‘sell’ but appropriate for younger crowd



WINTER IN NEW ZEALAND — WHERE NATURE COMES TO LIFE

YOU CAN WITNESS THE WONDERS OF NATURE COMING TO LIFE IN THE MONTHS NOT EVERYONE GETS TO EXPERIENCE.

COME TO NEW ZEALAND TO WITNESS THE BUBBLING ACTIVITY OF GEOTHERMAL POOLS IN ROTORUA, OR WALK ACROSS THE LIVING WHITE ISLAND VOLCANO. FORGET THE CITY LIFE AND EXPERIENCE THE SIMPLE BEAUTY OF FEEDING LAMBS AND RECONNECTING TO WHAT MOTHER EARTH HAS TO OFFER.

EXPERIENCE SOMETHING NATURALLY UNIQUE TO YOUR EVERYDAY IN NEW ZEALAND'S WINTER



Provides energy and interest but doesn't always convince them to come now

IN THEIR OWN WORDS

“I would love to feed baby lambs as I have never done that before. It would also be good to see lamb chops as there is no food promoted here”

“Does nature really spring into action in Winter? I am not convinced. I would need to look more closely into it”

WHAT THEY LIKE

IMPLIES THAT NZ HAS ENERGY & ACTIVITY – tonally it suggests there's a lot to do in NZ
HIGHLIGHTS WHAT IS UNIQUE – using the words 'unique' and 'beauty' appeals greatly to those considering a trip in Winter
RECONNECTING TO SIMPLICITIES OF LIFE (LIKE FEEDING LAMBS) - a sentiment most are striving for on holiday

WHAT THEY LIKE LESS

MOST ASSUME WE ARE TALKING ABOUT THE SEASON OF SPRING – literally understood as a holiday in months of March – May so can confuse
NO FOOD IS NOT FEATURED – desire to see process of lambing to fresh lamb chops
ARGUABLY IT COULD BE PROMOTING CHINA – doing a better job for Spring than NZ

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



Poetic metaphor of living life appeals as real vs. city



As nature is more accessible and they are more laid back vs. big cities, not as uniquely different



Activities shown with wildlife are really well liked



Not clear what 'type' of trip it is so means you have to know NZ



Which territories sell a NZ Off Peak holiday BEST?



WINTER IN NEW ZEALAND – FOUR SEASONS IN A DAY

THERE ARE FEW PLACES IN THE WORLD WHERE YOU CAN EXPERIENCE LUSH ROLLING HILLS, MAGNIFICENT SNOW-CAPPED MOUNTAINS, AND VOLCANIC LAKES ALL WITHIN AN HOUR'S DRIVE.

WINTER TIME BRINGS OUT THE BEST OF THIS VARIED NATURAL PLAYGROUND... WHAT COULD BE BETTER STARTING THE DAY WITH WALK THROUGH HOBBITON, BEFORE DISCOVERING A VINEYARD FOR LUNCH... FINISHED WITH A RELAXING SOAK IN A HOT WATER SPRING, SURROUNDED BY ANCIENT NATIVE FOREST.

SEE NEW ZEALAND A THOUSAND DIFFERENT WAYS THIS NZ WINTER



For those who've been to NZ, they get it. For those who haven't, it's interesting but taken literally

IN THEIR OWN WORDS

“This is exactly what it is like having been there last June. The weather can change day to day so all activities are possible”

“I wouldn't know what to take. It changes all the time”

WHAT THEY LIKE

THE IDEA OF EXPERIENCING FOUR DIFFERENT SEASONS IN ONE GO IS UNIQUE—despite clearly defined seasons in China variety each day is not available
VARIETY OF EXPERIENCES—the ability to pick & choose activities really appeals
DIVERSE ACTIVITIES IN CLOSE PROXIMITY—not something possible in China so new

WHAT THEY LIKE LESS

‘IN A DAY’ FEELS OVERWHELMING—take the idea of experiencing all weather so think they have to pack more luggage
IT DOESN'T FEEL AS RELAXING—promoting only a high energy, outdoors experience
FOOD IS GOOD BUT LOOKING TO PROMOTE SOURCE—preference for imagery that shows provenance of food & end product

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



It doesn't feel as attractive as visiting in summer



It has high energy & feels like there's lots to do



Feels like a special one day itinerary. Worth doing but a short trip



Like the idea of control over activities despite the weather



Offers a huge range of activities to deliver clients



Relaxation is a very compelling offer... and a version of NZ that has broad appeal. It just needs to feel distinctively kiwi

WINTER IN NEW ZEALAND— FIND YOUR OWN POCKET OF RELAXATION

DISCOVER THE SECRETS OF NEW ZEALAND, WHILST THE REST OF THE WORLD STAYS AWAY.

IMMERSE YOURSELF IN NATURALLY OCCURRING HOT WATERSPRINGS THAT SIT AT THE BASE OF IMPRESSIVE MOUNTAIN RANGES. EXPERIENCE THE WONDER OF SEEING GLOW WORMS THAT LIGHT UP THE LIMESTONE CAVES OR ACCOMPANY THE CRAFT BREWERY OWNER AND LEARN FIRST HAND, HOW MAKING YOUR OWN BEER FEELS.

WHATEVER ENABLES YOU TO SIT BACK AND RELAX, WE CAN PROVIDE. THERE'S SO MUCH MORE THAN YOU'D EVER IMAGINE IN NZ'S WINTER

IN THEIR OWN WORDS

“This one has an element of luxury in it which comes from relaxing and not being busy like in China. I want to go there to relax on my own terms”

“Find makes it feel like it is hidden and hard to get to. Having said that relax helps to balance the description”

WHAT THEY LIKE

LIKE THE IDEA OF RELAXATION THEY CAN CONTROL— being able to pick and choose what they want to relax resonates strongly

USE OF ‘YOURSELF’ – they can tailor the trip to their own needs so feels exclusive

EXPERIENCES FEEL POSSIBLE ACROSS THE YEAR – activities are not weather dependant so can be for everyone, anytime

WHAT THEY LIKE LESS

THE LITERAL TRANSLATION OF POCKET DOES NOT CONVEY ‘OWN PLACE’ – the idea of discovery does not always come across explicitly enough to enforce true meaning

USE OF ‘FIND’ – although more active than ‘wait’, can imply that is a lot of effort

NOT OVERTLY PACKAGE – idea of bundle at the end would convince many to book

EXPERIENCES	WISH LIST	SAFETY	PEOPLE
PRICE	EASE	TIME	WEATHER

<p>SH</p> <p>Like the concept of relaxation at their own pace</p>	<p>SE</p> <p>Can feel a slow & generic, esp. those who want action</p>	<p>CH</p> <p>Aligns to what they look for in a holiday</p>	<p>BE</p> <p>Offers something starkly different to city life but boring</p>	<p>TRAVEL AGENTS</p> <p>Although there are lots of activities to sell, could be more premium</p>
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WINTER IN NEW ZEALAND – THE ULTIMATE INDULGENCE

THERE IS NO GREATER COMFORT THAN A WARM BLANKET AND A GLASS OF WORLD CLASS CENTRAL OTAGO PINOT NOIR NEXT TO A ROARING FIRE... WHEN IT'S -9C OUTSIDE.

ENJOY THE BEST OF NEW ZEALAND COMFORTS IN A WOODEN LODGE, NESTLED IN THE MOUNTAINS. SAMPLE AND SAVOUR AWARD WINNING CHEESES AND FRESHLY MADE BREADS WITHOUT NEEDING TO VENTURE OUTSIDE... RELAX AND INDULGE.

MAKE YOURSELF AT HOME IN THE WARMTH OF OUR WINTER



The idea of indulgence is what they look for... our version is a good start but could have more energy to really hit a home run

IN THEIR OWN WORDS

“Indulgence and the idea of relaxing is really appealing. I want to use my holiday to take myself out of work. Being away, spending time & money on these experiences is indulgent”

“The food & chalet is not indulgent enough for me. I could experience this in China”

WHAT THEY LIKE

INDULGENCE AS A CONCEPT FEELS PREMIUM – having time to yourself appeals to the need for social status when travelling
INDULGENCE AS A WORD TALKS TO CONTROL & CHOICE – presents the activities as a customised version of travel
GET THE MOST OUT OF IT – talks to value in travelling all the way to NZ

WHAT THEY LIKE LESS

OUR VERSION IS NOT UNIQUELY NZ – greater emphasis on our nature is needed so that it is distinctively NZ
IT'S ALL INSIDE – they still seek outdoor activities even if it is colder
MORE PASSIVE IN TONE – although slower paced (which is liked) we need higher action options for younger travellers

EXPERIENCES

WISH LIST

SAFETY

PEOPLE

PRICE

EASE

TIME

WEATHER



Aligns to the lifestyle & superiority Shanghai feels



Feels exclusive & high end but more sedate



Delivers to the need for 'better', which is attractive



Activities are desirable but not as broad



Delivers to what customers want & experiences feel more profitable

An aerial photograph of a vast landscape, likely a river valley, with a winding river visible in the lower half. The center of the image is dominated by a large, bright white cloud that obscures the ground beneath it. The sky is a clear, deep blue, and the overall scene is bright and expansive.

Strategy & Recommendations



What are the jobs we need to do to increase Chinese bookings to NZ in May - October?

CONTINUE



To make it easy so that our off peak holiday delivers 'carefree'

START



To showcase 'natural indulgence' as a version of an off peak NZ holiday that is most compelling

GROW



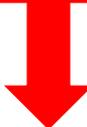
And reframe how we view Chinese use of technology so we get involved

Let's look at the HOW



They are sticklers for planning so the devil is in the detail... the more detail in itineraries upfront that's available online, the more likely they are to book

CONTINUE

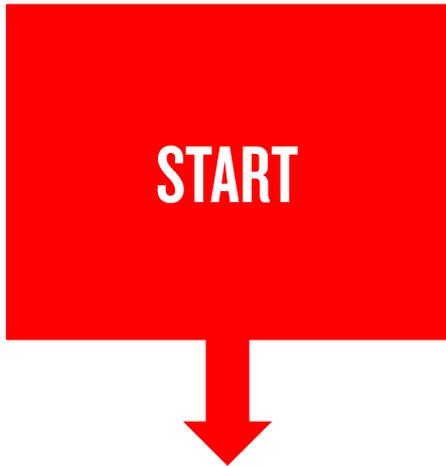
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We need to deliver to the core need of how Chinese want to feel when travelling - be carefree. The route to carefree in shoulder & winter is to make NZ **feel an easy option**. As soon as the planning and decision making feels hard the proposition is less compelling

SO HOW DO WE MAKE IT FEEL EASY? Pre-made itineraries, bundles of activities and clear visual descriptions of what they are getting so that they have a literal representation of what the NZ holiday will be like. It's not just about an itinerary - it's about having options within the itinerary



The NZ Holiday they seek is **NATURAL INDULGENCE**; relaxation in nature that feels exclusive and delivers social status



WINTER IN NEW ZEALAND – FIND YOUR OWN POCKET OF RELAXATION

DISCOVER THE SECRETS OF NEW ZEALAND, WHILST THE BEST OF THE WORLD STAYS AWAY.

IMMERSE YOURSELF IN NATURALLY OCCURRING HOT WATER SPRINGS THAT SIT AT THE BASE OF IMPRESSIVE MOUNTAIN RANGES. EXPERIENCE THE WONDER OF SEERINGLOUW WORKS THAT LIGHT UP THE LIMESTONE CAVES OR ACCOMPANY THE CRAFT BREWERY OWNER AND LEARN FIRST HAND, HOW MAKING YOUR OWN BEER FEELS.

WHAT EVER ENABLES YOU TO SIT BACK AND RELAX. WE CAN PROVIDE. THERE'S SO MUCH MORE THAN YOU'D EVER IMAGINE IN NZ'S WINTER



WINTER IN NEW ZEALAND – THE ULTIMATE INDULGENCE

THERE IS NO GREATER COMFORT THAN A WARM BLANKET AND A GLASS OF WORLD CLASS CENTRAL OTAGO PINOT NOIR NEXT TO A ROARING FIRE. WHEN IT'S -5C OUTSIDE.

ENJOY THE BEST OF NEW ZEALAND COMFORTS IN A WOODEN LODGE. NESTLED IN THE MOUNTAINS. SAMPLE AND SAVOUR AWARD WINNING CHEESES AND FRESHLY MADE BREADS WITHOUT NEEDING TO VENTURE OUTSIDE. RELAX AND INDULGE.

MAKE YOURSELF AT HOME IN THE WARMTH OF OUR WINTER

Relaxation appeals to the Chinese market because it offers what is completely opposite to their everyday. Providing a version of this in nature, which is what makes New Zealand unique is crucial.

Indulgence talks to warmth and exclusivity which provides a reason for why NZ and why now

AND HOW DO WE DELIVER NATURAL INDULGENCE? The tone and pace for Chinese campaigns needs to feel slower so that the experience is not rushed, but is instead relaxing. Think: meandering transitions, rather than quick changes



If it doesn't exist online and on Chinese platforms like WeChat, Chinese travellers don't know where to 'buy' into travel to NZ

GROW



We know China has one of the most (if not the most) developed technology markets in the world. Not only does WeChat enable Chinese to dream but also purchase.

Mobile payments are how they shop and plan which is true for tourism as much as retail, meaning we need to make it easy for them to click and pay immediately

AND HOW DO WE HARNESS TECHNOLOGY? We need to use technology to be seen as relevant to the Chinese market. A clear digital strategy with capabilities to buy is essential so that we, as a destination, are relevant enough to purchase and come



A Chinese communications campaign would meander through experiences, showing volume & variety of activities without feeling rushed

BACKGROUND

- Chinese travellers represent a significant volume of visitors flying and experiencing NZ primarily in our peak, summer season. The challenge is to grow our off peak visitation numbers so that Chinese travellers are compelled to travel to NZ during our shoulder and winter seasons, which will distribute the numbers of visitors across the year and country. This will also increase the demand for direct flights from China throughout the year

WHAT ARE THE BUSINESS OBJECTIVES

- We are looking to bring to life the ultimate proposition to encourage Chinese travellers to visit NZ from established and aspirational Chinese markets in the months of May - October. We need to convince our partner carriers that there is a legitimate business case to continue flying to NZ off peak because Chinese travellers are open to coming.

SUCCESS MEASUREMENTS

- NZ is seen as a relevant destination for Chinese travellers in our winter and shoulder seasons
- For those that come to NZ off peak, they are able to have an experience which delivers to expectation of NZ and feels as good as what they imagine they could have in the Summer season
- Existing international carriers and potential new carriers continue & start to fly during the winter months

WHAT PERCEPTION DO WE MOST WANT TO CHANGE?

- That NZ is closed and Chinese travellers can't have the experience they are looking for from NZ in winter

WHO ARE WE TARGETING?

- Older Chinese who are slowing down but not yet obligated to do as their children tell them / look after their grandchildren full time. These older Chinese travel in peer groups so providing package options that we heavily promote online is important
- Younger DINKs and professionals who are not yet parents also have the freedom to travel as well as the confidence to experience NZ in a more FIT format

CREATIVE DIRECTION

- Natural indulgence which heavily features how they can feel indulged by nature in what they see, eat and experience - a variety of different activities in nature show diversity of experience, providing Chinese travellers with choices they can select from. There is importance in showing freshness and abundance of produce.
- Tonally our campaign needs to feel like there is movement and pace, but that this is not too rushed or overly energetic, because this does not relax the type of relaxation Chinese travellers seek. Slower pace makes the type of holiday feel more exclusive

CHALLENGES

- Not to overpromise what can be done - Chinese like to know that obtaining the photo is absolutely possible
- To embrace fully the role of technology in how and where we launch our campaign - essential to use platforms like WeChat



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