

UNLOCKING CONSIDERATION FOR A NEW ZEALAND WINTER HOLIDAY WITH US TRAVELLERS

Prepared for
Auckland International Airport Limited
By Big Picture 2017

Big picture 



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 & CONSUMERS 16 IN DEPTH INTERVIEWS:

4 Groups & 8 Depths with consumers who HAVE BEEN to NZ:

- 25-54 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

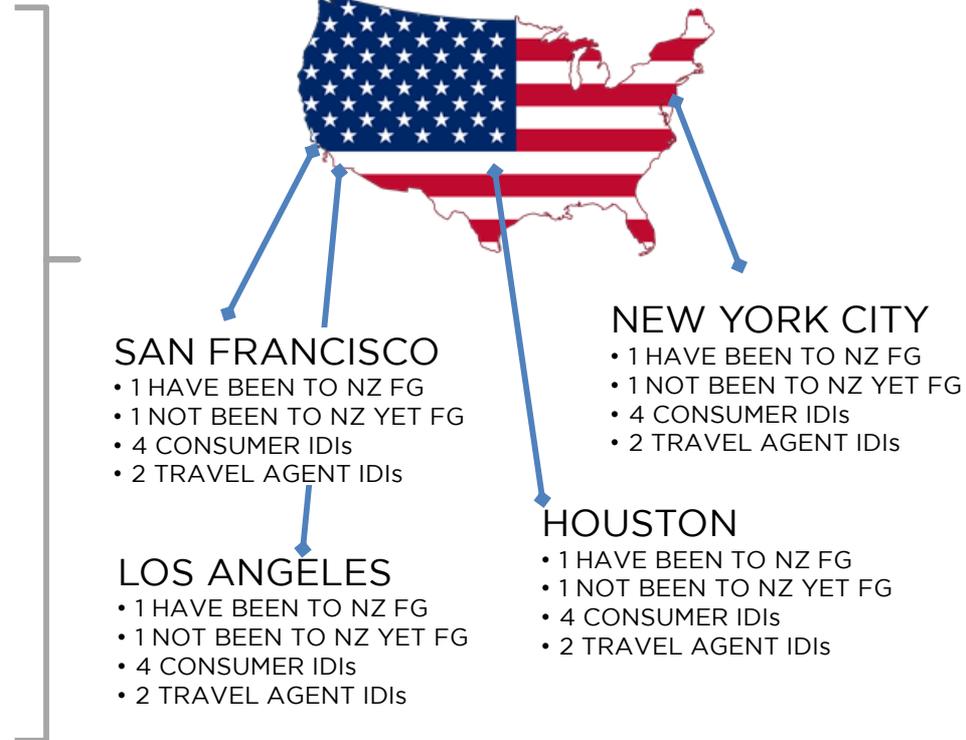
4 Groups & 8 Depths with consumers who HAVE NOT BEEN to NZ:

- 25-54 years of age
- Skew higher HHI \$100K+, include HHI \$75K with families
- Considering travelling to NZ within next 1-4 years - firmly on wish list

PLUS

8 B2B INTERVIEWS: TRAVEL AGENTS

- Travel partners who work with AIAL - list of contacts provided
- Mix of those who regularly promote and book NZ holidays and those who are less familiar and book NZ holidays less frequently



A person is holding a globe of the Earth in front of a wall covered in newspaper clippings. The globe is the central focus, showing the continents of North and South America. The person's hands are visible at the top and bottom of the globe. The background is a wall of various newspaper articles, some with headlines like 'Can You...'. The overall scene suggests a focus on global news and customer insights.

**STARTING OFF WITH SOME QUICK FIRE TRUTHS FROM THE KEY
CUSTOMER GROUPS WE SPOKE TO...**



STARTING WITH 5 TRUTHS FROM TRAVEL AGENTS

1.

THEY ARE STILL RELEVANT – but more so to a high end traveller where they value knowing somebody is there to take care of the details and sort issues, more than finding the best price to a given location

2.

THE FURTHER AWAY OR MORE ‘COMPLICATED’ THE DESTINATION, THE GREATER THEIR RELEVANCE – they can book themselves, but choose not to if they’re unsure. THINK: language barrier, complex flights plans

3.

THEY FOCUS ON SELLING THE ALL INCLUSIVE – it’s all about productised travel that let’s their customers know where they are going and what they are doing, and importantly what it includes

4.

THEY SELL WHAT THEY KNOW – they use knowledge & personal experience to convert from consideration to booking and ultimately make the sale. Destinations they don’t know are reliant on customer preference

5.

A SHIFT TOWARDS MORE EXPERIENTIAL TRAVEL – they are offering less touristy / cookie cutter & more participatory experiences where customers become involved in locals’ lives – cater for luxury customers



**TRUTHS ABOUT THE CITIES
IN THEIR OWN WORDS**



LA - ARE LOOKING FOR THE REAL AND AUTHENTIC

- **A CITY THAT'S RULED BY THE CAR** - conversations start with the traffic, and how hard it is to get around. Long commute times are the norm, and constant congestion is a daily battle

SO: smaller and easy to get around is a stark relief to the pain of their everyday. The less travel they have to do to see something amazing, the better

- **A LIFESTYLE THAT MAKES THE MOST OF THE WEATHER** - nobody complains about the weather and what it affords them to do. Permanent sunshine is an expectation and it puts everyone at ease. Summer brings a casualness to how they dress, dine and behave

SO: their version of nature and the outdoors is sanitised & beautiful, rather than rugged & raw

- **PEOPLE THAT CAN BE HARSH & SHALLOW** - lives lived on show and image conscious. There is a perception that nobody has time for small talk, nor is especially interested in who you are beyond the material. Instead you have and maintain curated beauty

SO: there is a desire to seek out what's missing from their lives...
Real & meaningful connections that look beyond the surface



SAN FRAN – AN APPRECIATION FOR ART & CULTURE

- **A CITY WHERE THEY KNOW & LOVE NATURE**- SF has natural diversity close by; hills and harbours. An active lifestyle is part of working hard & playing hard – Silicon Valley during the week & SF at the weekend. The periphery tech boom drives the cost of living up so they have the lifestyle but it comes at a cost

SO: we need to be more careful about what we show them and specifically focus on what they don't have to inspire interest

- **A LIFESTYLE THAT'S MORE WORLDLY IN IT'S OUTLOOK** – San Franciscans suggest their values are strongly grounded in being informed and culturally knowledgeable, which enables them to have the freedom of personal expression

SO: knowing the story behind our city and nature is important – a more learned approach to travel

- **PEOPLE WHO SEE THE GOOD & THE BAD OF WHERE THEY ARE FROM** – they're aware of our reputation as a 'good country' & that we share similar values on things that matter to them likes politics. They are also acutely aware of how they are now perceived with Trump in power

SO: don't assume they are the same as the rest of the USA. They share our world view & values – our open-mindedness

HOUSTON – HOME IS WHERE YOUR HEART IS

- **A CITY THAT'S PROUD OF IT'S DIVERSITY** - they live in their own communities, harmoniously alongside each other. They are afforded this lifestyle because of space – they have the space to find their own patch and live freely with those akin to their culture

SO: talking to seeing wide open spaces without travelling huge distances offers the best of both worlds – everything close

- **A LIFESTYLE THAT'S ABOUT THE INDOORS** – it's where cars take precedence over pedestrians & where escaping the sun is a priority. It's a more low rise city where shopping and dining are a destination – something they seek out as an outing/activity, enjoyable despite the heat

SO: they don't want to 'experience' too much nature. They are more sedentary so are happy to observe and see, rather than always 'do'

- **PEOPLE THAT ARE TAKE PRIDE IN WORKING HARD** – an accepted view that you create your own luck in life and it's possible to make yourself in Houston. There's a strong work ethic that the difference between the haves and have-nots is how hard they work

SO: Their focus on work means there are smaller time windows for travel & leisure. They desire seeing a lot in a short period of time to maximise their leave

NYC – WHERE EVERYONE HAS HUSTLE

- **A CITY WHERE YOU CAN NOT JUST SEE THE BUSTLE BUT FEEL IT TOO** – Everyone in NYC has a commercial purpose. It's the reason they have moved here – to make their fortune. They're highly ambitious & put a lot of pressure on themselves to appear successful

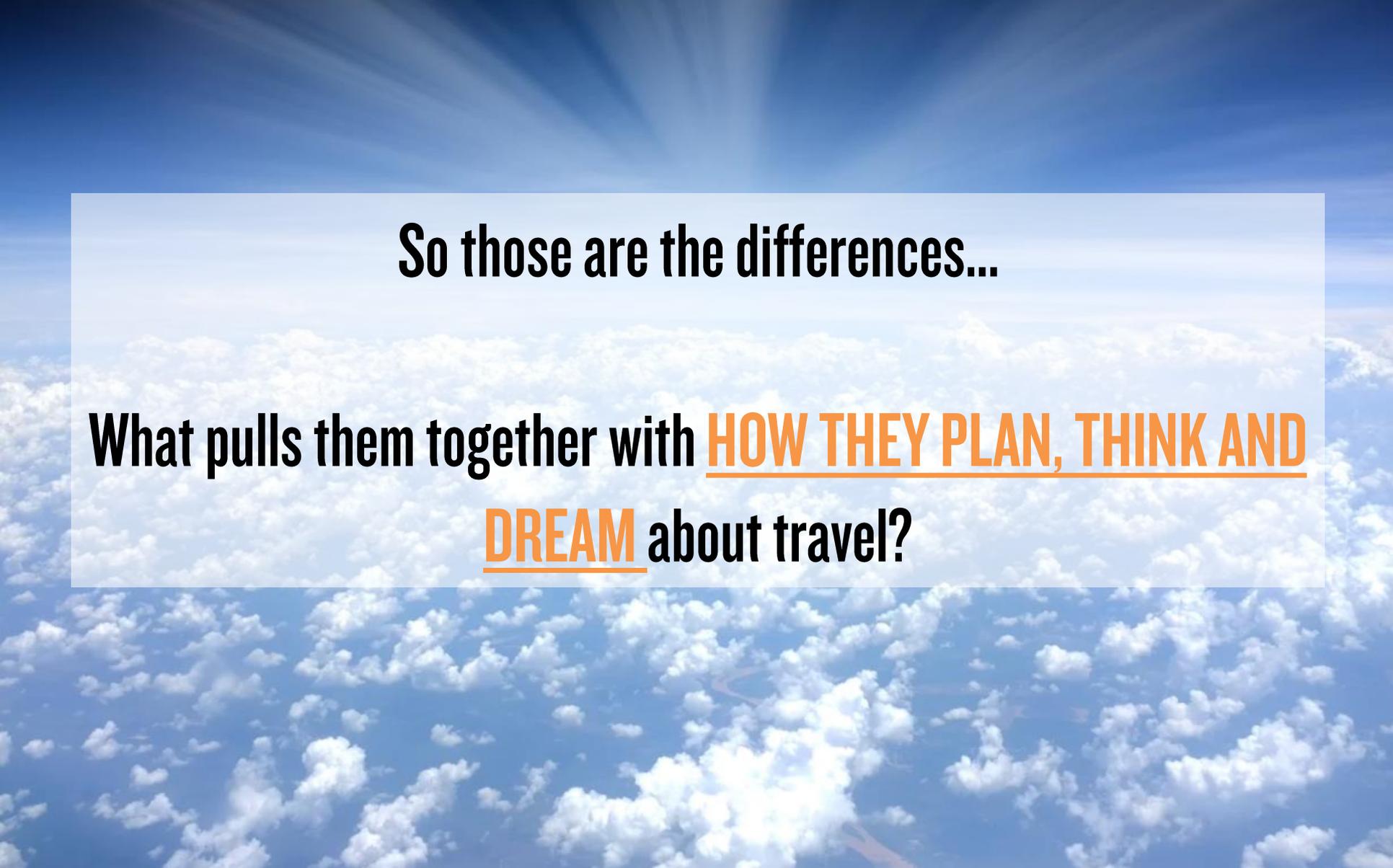
- **A LIFESTYLE THAT IS ALWAYS ON** – there is never a dull moment in NYC. There's an expectation that life is 24/7 so everything including you, are constantly accessible. Stories of 18 hour days are commonplace. The place and the people make themselves available all the time

- **PEOPLE THAT ARE STRAIGHT TALKING & NOT AFRAID TO GIVE YOU AN OPINION** – there's no time to sugar coat what they *really* think. They are direct & honest – something they're proud of. They are 'friendly' by being respectful of each others' time & opinions

SO: getting away from the city to the promise of wide open spaces & national parks is at contrast to there daily grind

SO: sense of being able to unplug and entirely switch off has real appeal. it is not something they can do easily in usa

SO: subtleties can be lost. if we want them to come we have to tell them directly... they want to feel wanted



So those are the differences...

What pulls them together with HOW THEY PLAN, THINK AND
DREAM about travel?



Shared thoughts on the PRACTICALITIES

What US travellers consider before they travel?

CONSIDERATIONS WHEN THINKING OF TRAVELLING

WHAT DO I KNOW?

Always google a place before they travel there. Destinations that are negatively on the news, are often avoided

ALL INCLUSIVE OR NOT

Looking for the best deal to maximise the US dollar. All inclusive packages of hotels, flights and even food make travelling easier

LOYALTY AIR POINTS

They prefer to use available points, but collecting them is not a priority. They choose the most affordable airfare available

DIRECT AIRFARES

Ideally they want to have the least number of connections possible. Changing flights equals hassle and less holiday time

WHAT THIS MEANS WHEN IT COMES TRAVEL

THEY ARE PLANNERS

Acceptance that last minute bookings don't get you a better deal. Choose 2-3 activities that are a core part of their itinerary

THEY ARE LESS INTREPID

Knowing where, how & when they will be really matters. Prepared with the 911 number & having a Plan B is important

THEY VISIT 'ONCE'

They have so many places on their list they only ever plan to come to a destination once so maximise their time when there

THEY PREPARE TO SPEND

They choose pay extra for experiences knowingly so that they make the most of their vacation

WHAT THIS MEANS: We need to make travelling to NZ as easy for US travellers as possible so that it feels simple and manageable to navigate when planning as well as when they get here



Shared Thoughts on their SOCIAL NEEDS

What US Travellers consider before they travel?

CONSIDERATIONS WHEN THINKING OF TRAVELLING

TALKING IS GOOD

The busy daily routine means they don't often get to connect with 'neighbours' - they seek this when on vacation

CONSCIOUS OF TRUMP

Sensitivities have increased since Trump's presidency. Some feel embarrassed about what others *really* think about them

WANT TO BE WANTED

There reluctance to travel places where they feel they'll be treated negatively because of what they 'represent'

LOOKING TO INTEGRATE

US travellers need reassurance that they leave their shores and be welcomed & as well as integrate i.e. not stand out

WHAT THIS MEANS WHEN IT COMES TRAVEL

THEY WANT TO CONNECT

Immersive experiences with locals is what US travellers seek - the further away from touristy and 'fake', the better

THEY LOOK FOR REAL

Visiting a market or having experiences one on one make the trip more memorable and culturally rich

THEY UNDERSTAND

Familiarity of being able to communicate in English with locals provides a layer of security most actively seek

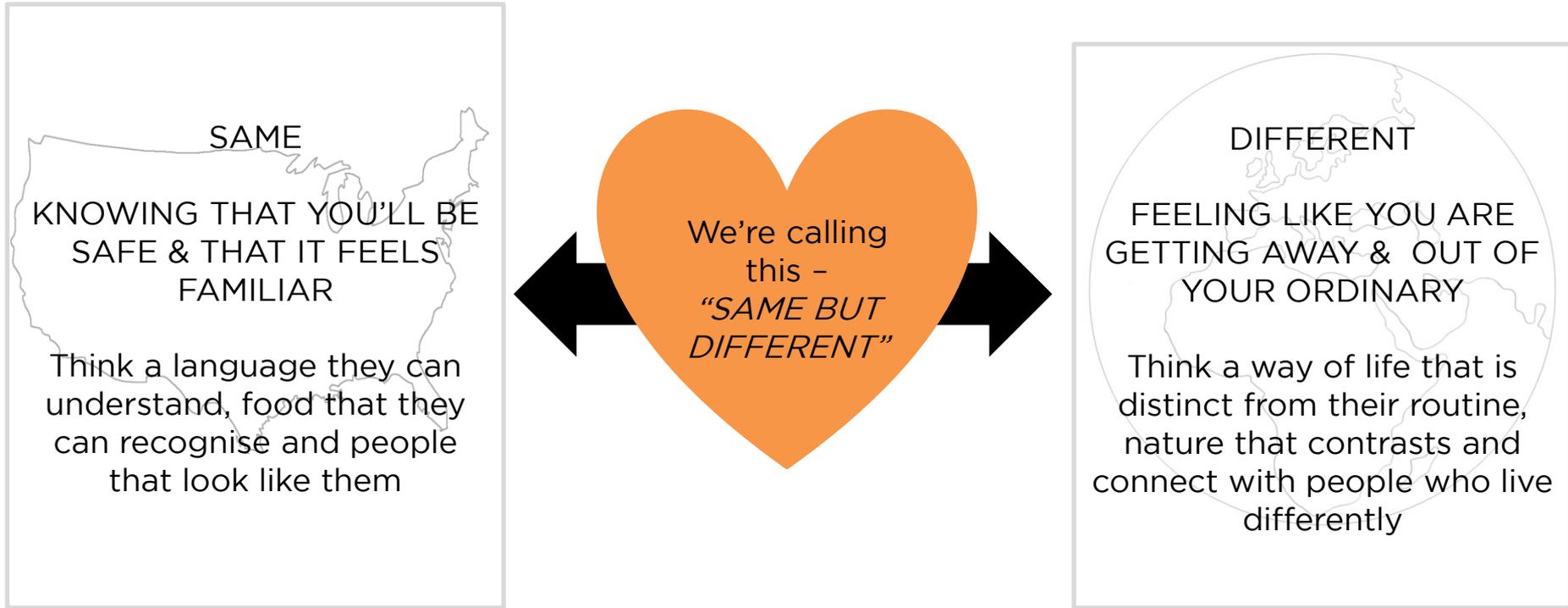
THERE'S A COMFORT ZONE

US travellers want something new to what they have at home, but not so different that they start to feel anxious

WHAT THIS MEANS: US travellers have a need for being accepted that comes from a fear that they are seen as "Ugly Americans" (Manaakitanga). We need a clear call to action that invites them to come to us



... and shared thoughts on EMOTIVELY what are they consider and actively seek



WHAT THIS MEANS: We need to align what they know and seek from a travel experience, but offer something distinctively different that makes them consider NZ over all other destinations



By city how do nuances manifest themselves in what they are looking for?



WHAT THEY SEEK

Culture
Acceptance
Natural Environment

Like minded people
Open mindedness
Good food

Different landscapes
Friendliness
Ease

Cultural experiences
Cosmopolitan people
Natural environment

LOOK TO AVOID

Traffic & congestion
Hustle & bustle
Superficial people

Stresses of work
Politics of the country
Expensive living

Heat
Work & financial stress
Traffic congestion

Volumes of people
Grind of commuting
The constant hustle

WHAT EXCITES THEM ON VACATION

NATURE

CULTURE

PACKAGE

LUXURY



So what do we need to deliver for them to book?

When we travel we want to make the most of the trip & the further away and/or the more expensive the trip, the higher our expectations become...

So WHAT MAKES A TRIP WORTH BOOKING in the mind of the US traveller?



“It’s a destination that’s on my WISH LIST”

WHY IS A WISH LIST IMPORTANT TO US TRAVELLERS?

US travellers like **showing other people** they are culturally informed.

A list of icons to say they’ve been to **elevates social status & prowess.**

“Not all Americans go outside their comfort zone. I’m more intrepid”

WHAT MAKES THE IT ON TO THE WISH LIST?

PLACES THAT HAVE DISTINCT ICONS – known sites are on the top of the list... Big Ben, Eiffel Tower

RECOMMENDATIONS FROM FRIENDS / FAMILY – Places they have ‘heard’ mentioned as it feels more personalised

VISITING FRIENDS & FAMILY – being shown around by a ‘local’ who provides free accommodation

WHAT THIS MEANS: We don’t have a specific icon like Big Ben or the Eiffel Tower, which can place us further down the wish list. We need notable experiences that become part of the bucket list to tick off in NZ



“It’s an EXPERIENCE I can’t get in the USA”

WHY ARE EXPERIENCES IMPORTANT TO US TRAVELLERS?

They desire **personal connection** – first hand experiences with locals

It’s important for them to **say they’ve done it** – proof the trip was ‘theirs’.

“Chatting with the bus driver was a highlight... we loved the stories”

WHAT MAKES THE AN EXPERIENCE DIFFERENT?

PHYSICALLY BEING IN A DIFFERENT PLACE – using the passport & getting on a plane that takes them away

A FEELING OF CULTURE SHOCK – Although some things are similar, there are noticeable differences

IMMERSION & OBSERVATION – watch / be involved in a cultural practice that is unique & can’t be replicated

WHAT THIS MEANS: The fact we are away from the USA works in our favour because we present difference. The challenge for us is not appearing so far away that we put US travellers off the idea of visiting NZ



“I have the TIME to make the most of it”

WHY IS TIME IMPORTANT TO US TRAVELLERS?

In USA **time is money**. Annual leave is limited for us travellers.

They have 20 days max so **8-10 days** is considered a long break

“If I’m going down to that part of the world, I want to do it properly...”

WHAT MAKES THE TIME AVAILABLE IMPORTANT?

TIME TO GET TO THE DESTINATION- they don’t want to waste any time getting there

MAKING THE MOST OF TIME WHEN THERE - want the lion’s share of the vacation to be doing something

TAKING THE TIME TO RELAX - having enough time in each place so they have seen the best but are still relaxed

WHAT THIS MEANS: We have to make US travellers feel like they can maximise their vacation in their limited annual leave days, without feeling they’ll spend the entire trip travelling... seeing lots but still being relaxed



“I’ll meet PEOPLE I’ve never met before”

WHY ARE PEOPLE IMPORTANT TO US TRAVELLERS?

Social acceptance is what US travellers are looking for.

They have high expectations & standards for **hospitality and service**.

“The people in NZ are just so friendly. Anyone will make time”

WHAT MAKES THE PEOPLE DIFFERENT?

A LIFESTYLE THAT’S NOT LIKE MINE – discovering a slower pace of life where there’s more balance

ATTITUDES THAT CHANGE MY PERSPECTIVE – world view & environment to make me think outside of my own

STORIES & PRACTICES INTERESTING TO LEARN – history and culture of native / indigenous people

WHAT THIS MEANS: Above else, an open attitude and friendliness to visitors is what US travellers are looking for. A clear invitation to visit makes US travellers feel welcomed



“I’ll get a PRICE that works for me”

WHY ARE PRICES & MONEY IMPORTANT TO US TRAVELLERS?

USA is the home of capitalism. they are **comfortable talking about money**

Materialism is part of life. They are **constantly looking for a deal.**

“I want to know I’m getting the most bang for my buck”

WHAT MAKES THE PRICE IMPORTANT?

EVERY TRIP HAS A BUDGET – set parameters as to what they can afford to spend

DOMESTIC IS MUCH CHEAPER – international travel needs to be worth it so they commit to longer flight

THEY MAKE AIRFARE CHOICES ON PRICE – loyalty to airlines is not strong – a cheaper direct ticket will win out

WHAT THIS MEANS: We can’t underestimate the power of a flight deal or promotion to get US travellers over the line



“I’ll have WEATHER that’s better than here”

WHY IS THE WEATHER IMPORTANT TO US TRAVELLERS?

Weather **defines** the culture, the activities & routine of everyday life.

They can **choose** the weather they **want** by visiting different coastlines.

“We have Disneyland & sunshine – what is not to love about life”

WHAT MAKES THE WEATHER IMPORTANT?

WEATHER INFORMS WHAT YOU CAN DO – determines whether you’ll be inside or outside, indoors or outdoors

IT CHANGES HOW YOU FEEL ABOUT A PLACE – sunshine makes us all feel better, it lifts travellers’ spirits

IT DETERMINES WHAT YOU PACK – the practicalities of clothes needed to pack is informed by the weather

WHAT THIS MEANS: We can’t talk about weather because as soon as we do, US travellers think temperature and cold. Instead we need to talk to the feelings that different times of the year can bring



“It needs to be EASY TO TRAVEL to”

WHY IS EASE OF TRAVEL IMPORTANT TO US TRAVELLERS?

US travellers do a lot of travel daily. distances in the USA are huge.

They have big cars & public transport so **getting places is easy**.

“I drive 2.5 hours to get to work & back, 4 times a week. Traffic is bad”

WHAT MAKES THE EASE OF TRAVEL IMPORTANT?

LONG DISTANCES ARE NOT ALWAYS RELAXING – spending periods of time on a plane when leave is so limited can determine where and when US travellers fly

THERE'S A CHOICE BETWEEN CARRIERS – multiple flights a day to a destination at a competitive prices

SECURITY AT AIRPORTS IS BEGINNING TO GRATE – the hassle of processes & travel can make some resentful

WHAT THIS MEANS: the biggest hurdle is the distance to get to us. Think: go to bed in LA and wake up in Auckland. The message of everything close needs to be part of our proposition



“It needs to be SAFE for me and my family”

WHY IS SAFETY IMPORTANT TO US TRAVELLERS?

USA is big and is used to having the monopoly so **outside is unknown**.

They **fear what ‘others’ do** outside of their borders especially terrorism.

“You look at what’s going on in London, Barcelona. It’s just not safe”

WHAT MAKES SAFETY IMPORTANT?

CONCERNS KEEPS THEM ON EDGE- they can’t fully relax if they feel uncomfortable away from home

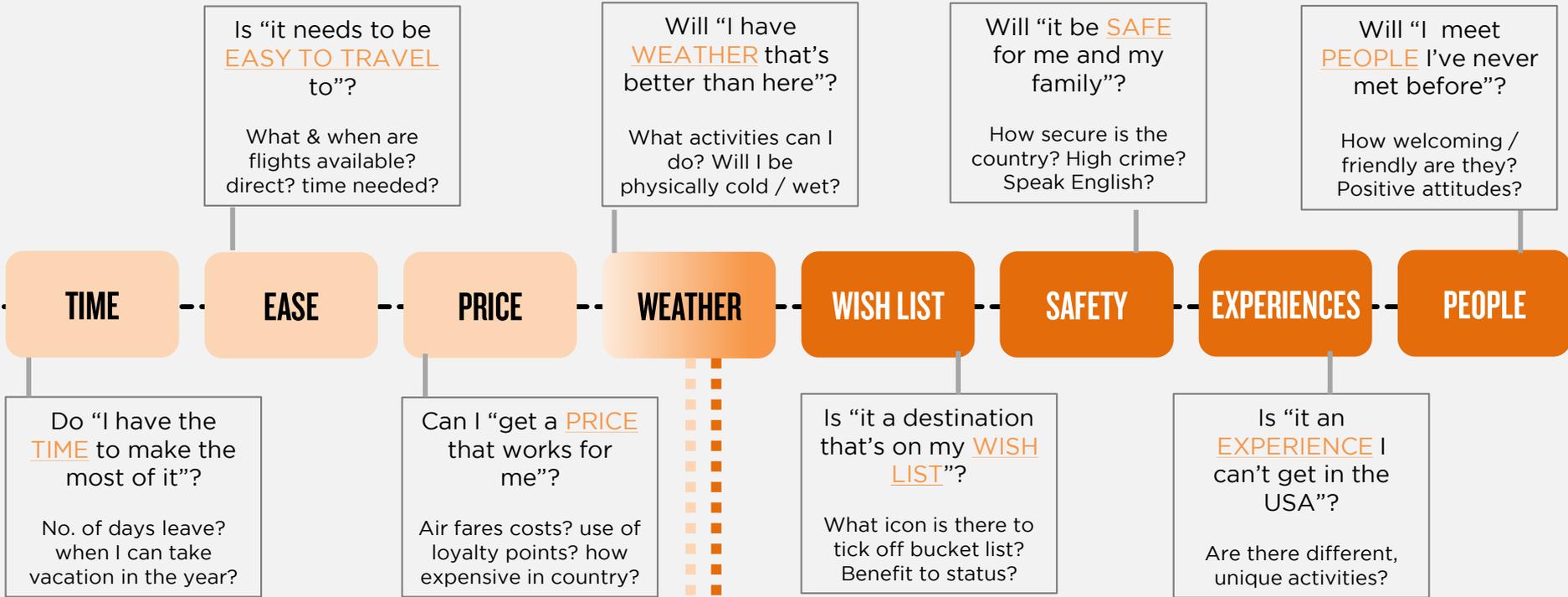
PLACES NEED TO BE SECURE - can they seek reassurance that they can get help in an emergency

THEY WILL SPEND MORE MONEY TO FEEL SAFER - willingness to take precautions. They’re not risk takers

WHAT THIS MEANS: We are a safe destination - we speak the same language and have similarities, which means that we fulfil a need for US travellers



Summing it all up – The considerations when **BOOKING** travel



PHYSICALLY AVAILABLE CONSIDERATIONS

MENTALLY AVAILABLE CONSIDERATIONS



The interesting thing about WEATHER...

Weather can be both a physically and emotionally available consideration because of how weather can impact us - what we do and how we feel doing it!

TIME

EASE

PRICE

WEATHER

WISH LIST

SAFETY

EXPERIENCES

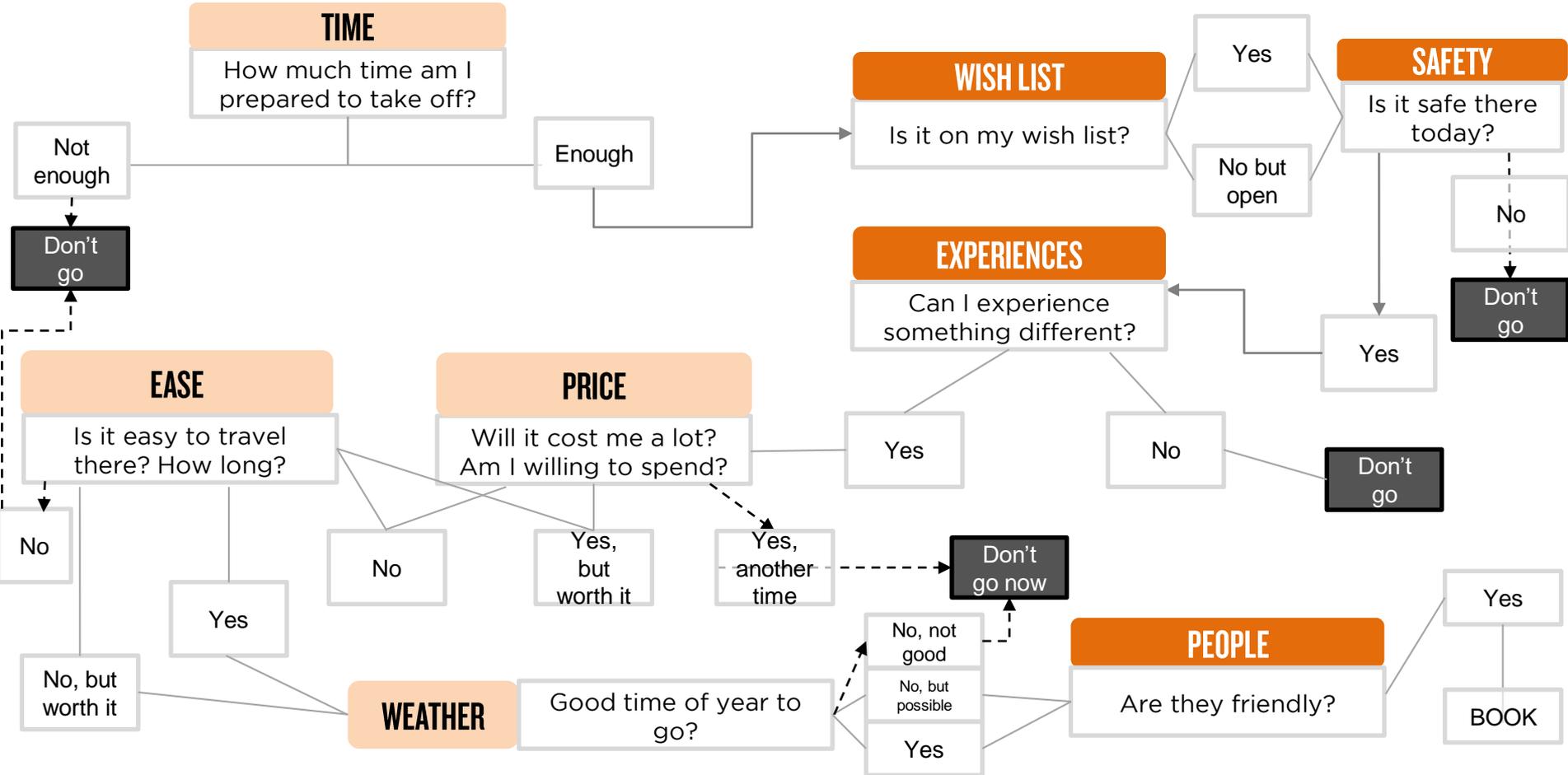
PEOPLE

PHYSICALLY AVAILABLE CONSIDERATIONS

MENTALLY AVAILABLE CONSIDERATIONS



How these booking considerations inform decision making for NZ...?





... Weather then is a key factor at the end of a long chain of decision making factors that can result in vetoing a destination, as well as affecting when they believe they should go.

Let's deep dive on SEASONS & THE IMPACT IT HAS on where & when they travel



A US Winter is their time for family



CHRISTMAS & THANKSGIVING

It's the time of year where two of USA's biggest holidays take place so there is a reluctance to be out of the country

DOMESTIC TRAVEL

US travellers take the opportunity to return 'home' to different parts of the country to spend time with family when all are off

LONG WEEKENDS

Utilising the country's national holidays, US travellers make the most of their time by going away for long weekends only

DECEMBER / JANUARY

These months can often be busy with work as it's the end of the year. Many prefer vacations when they are quieter at work

WHAT THIS MEANS: They actually don't want to travel in our summer – they are in a domestic mind set, that's filled with obligation to see friends and family



What differences exist in their winter mind set?



KEEPS THEM THERE

It's less busy as there are fewer tourists

It's colder, but not unbearable

The pleasant temperate weather

The city is picturesque with shopping & snow

WHAT TAKES THEM AWAY

Colder than normal

They are drawn to activity

Returning home to VFR

The snow causes chaos - the novelty wears off

WHAT THEIR WINTER LOOKS LIKE

QUIET

SKI

OUTDOORS

INDOORS



A US Summer is when travelling is top of mind



SCHOOL'S OUT

It means families and the education sector have a lot of free time to get out of the USA and travel for longer periods

MID WAY THROUGH THE YEAR

It's a natural break for those whose last proper break from work was the Christmas / Thanksgiving vacation

NO KIDS AVOID CROWDS

Retirees and DINKS tend to travel in the shoulder period to get cheaper fares and avoid the busyness of families in airports

CHANGE OF SCENE FROM HEAT

Not true for everyone (esp. those who choose to live in LA, SF & HOU), but some look to get out of the heat... tend to be older

WHAT THIS MEANS: Our NZ winter aligns to when our target US travellers are actively seeking to get out of the USA



What differences exist in their summer mind set?



Drawn to beach where they are cooled by the Pacific Ocean

Fog that keeps climate mild. Markets and summer cultural events

Air conditioning everywhere means life continues

Events, concerts and Central Park - everyone is outside enjoying life

The chance to say they have been somewhere different - status

Busyness of tourists & everyone else choosing SF for vacation

The monotony of having the *same* weather all the time

The humidity of heat in a busy city - they like dry, not wet heat

DIFFERENT

ADVENTUROUS

NEW

EASY

KEEPS THEM THERE

DRIVES THEM AWAY

WHAT THEY WANT SUMMER TO BE



But the shoulder is when they believe it's best to travel



AVOIDING THE CROWDS

Avoiding the crowds but making the most of the seasons. Even those with children happily take them out of school

GETTING A CHEAPER AIRFARE

Something that many try to take advantage of and actively plan their travel around - Europe especially

AVAILABILITY IN HOTELS

More likely to be able to have first pick of the luxury hotels without needing to book too far in advance

NOT AS BUSY AT DESTINATION

Again Europe mentioned a lot and restaurants being quieter, and not feeling like 'another American tourist'

WHAT THIS MEANS: a real opportunity when weather is more bankable and availability better and helps with convincing we sell seasons



**If we convince US Travellers to travel during their summer,
there will naturally be an increase of visitation over the
shoulder period because there's a cohort of travellers who
will always try to beat the crowds**



What about NZ?



Travel agents who have been to NZ can't rave about us enough

1. **THEY SEE NZ AS A DESTINATION IN IT'S OWN RIGHT** - it's a place that needs time & energy exploring so it's best to spend your full vacation in NZ rather than split between AUS

2. **AIR NZ IS AN AMAZING EXPERIENCE** -travelling our national airline, they feel their holiday starts from the flight - Kiwi accents, enjoying NZ food & wine is part of the experience

3. **NZ IS SAFE, PEOPLE ARE FRIENDLY SO VACATIONS ARE EASY** - there is little to worry about once because Kiwis speak the same language & the country feels safe and welcoming

4. **IT'S EASY TO BOOK & TRAVEL BY CAR... AND SEE EVERYTHING** - most are pleasantly surprised at how much there is to see on the road and how easy it is to travel by car vs. USA

5. **BUT OUR 4* AND 5* HOTELS ARE LACKING** - Langham & Hilton in AKL are below par when it comes to luxury - Sofitel is the only option. They tend to go out of AKL for decent options

**THOSE WHO
HAVEN'T
BEEN ONLY
SELL US BY
CUSTOMER
REQUEST...**

**...BECAUSE
THEY DON'T
KNOW WHAT
TO DO....**

**....AND ARE
MORE LIKELY
TO SEE US AS
AN ADD ON**



For US travellers who haven't been to NZ, they imagine it to be... green



"I imagine lots of *green hills, rolling hills* that go on into the distance like LOTRs"

"They have *sheep and lots of farms*"

"NZ is *far away* - a *little* island far from here"

"I imagine everything to be *green and very pure*.
Clear skies and waters"

"People are funny. They have a *great attitude*"

GREEN NATURE

Assumed that we are almost a lush, exotic island with unbelievably beautiful natural sites - lots of trees, plants, bush

LOTR EPIC LANDSCAPES

Much of what they know has been shaped by LOTR - and like it or not, is on the list attractions for when they get here

SMALL AND FAR AWAY

'Small' comes from being less known & being associated with our neighbours AUS who are 'on the other side' of the world

MAYBE AKL OR EARTHQUAKES

They don't know much else. Some are able to name Auckland, and maybe Christchurch given the earthquakes otherwise their understanding of geography is low - don't know N & S. Island

HEARD PEOPLE ARE FRIENDLY

Whether it is Peter Jackson, Flights of the Concorde or WOM from those who have been, they've heard Kiwis are welcoming

WHAT THIS MEANS: A lot of what they know about NZ is what they would assume they would need to see in summer - when the weather and the nature they know, looks it's best



For those that have been, they know it to be better than imaginable



“NZ was *beyond my expectations...* and gave me a vacation I don't think I could have got *anywhere else in the world*”

“It is one if not the *most beautiful place*. I considered moving there. I've been x 21 times”

“It is *untouched, pristine beauty*. Breath taking”

“You can stop and ask *anyone to help you*”

GREEN NATURE →

BREATH TAKING NATURE

The promise of nature is better than they imagined – diverse landscapes all in close proximity and even on the road

LOTREPIC LANDSCAPES →

UNIQUE LANDSCAPES

See glaciers, volcanoes and lakes that they didn't expect. Not only that but we have a lot of wildlife... like whales & penguins

SMALL AND FAR AWAY →

SMALL BUT WORTH THE EFFORT

The journey isn't as bad it sounds because they could go to sleep in US and wake up in NZ (for LA, SF & HOU)

MAYBE AKL OR EARTHQUAKES →

VARIED ACROSS TWO ISLANDS

N Island presents a different vacation to the S Island so feels like two trips in one – lots of choice to experience all NZ offer

HEARD PEOPLE ARE FRIENDLY →

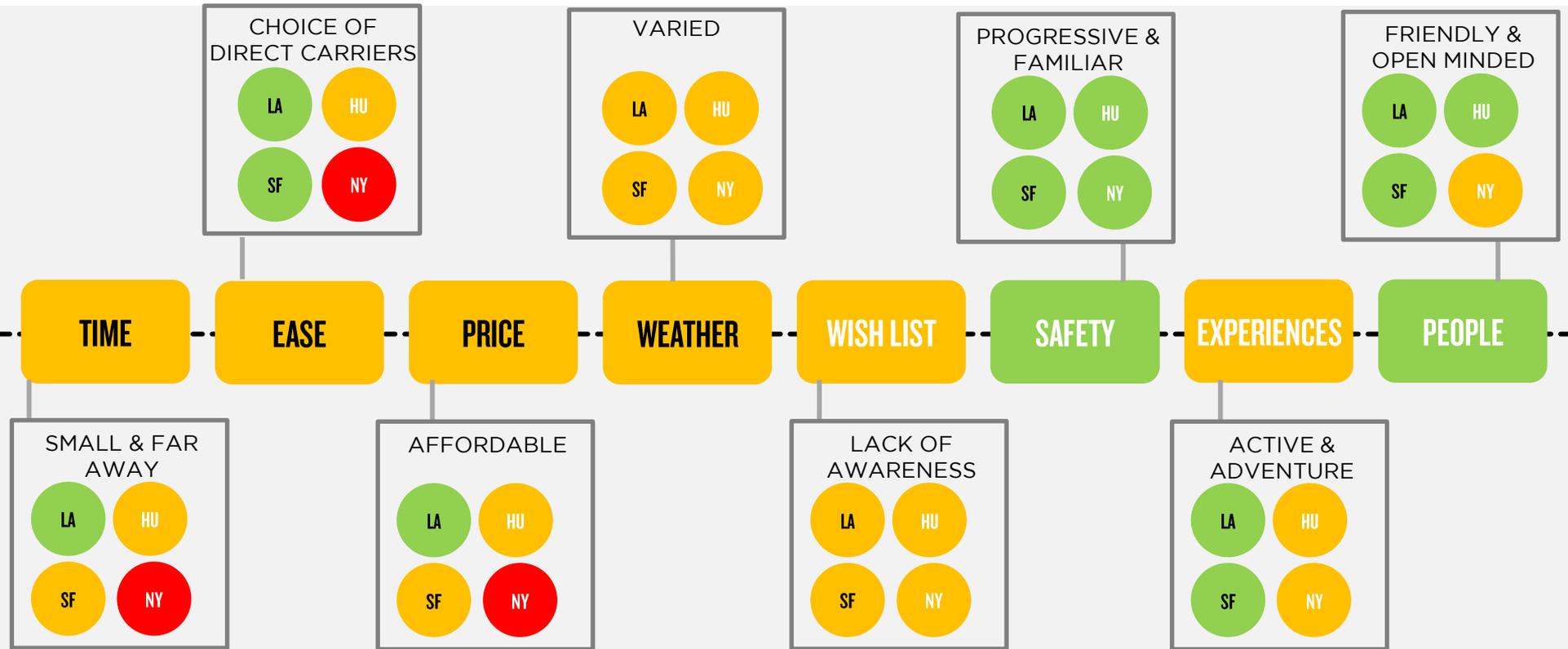
SO FRIENDLY & WELCOMING

Our people are warm and engaged with visitors, which makes US travellers feel more wanted and welcomed

WHAT THIS MEANS: Most who have been to NZ have come during our summer or shoulder season to VFR



Summing it all up – how does NZ AS A DESTINATION perform on our booking considerations?



A NZ WINTER & OUR WINTER WEATHER... what do they expect?





They differ depending on whether US travellers have visited before



FOR THOSE WHO'VE BEEN

“I would assume it would be a bit wet in the South Island and that there maybe some snow on the mountains. It wouldn't be *that* cold really. You can still walk in nature”



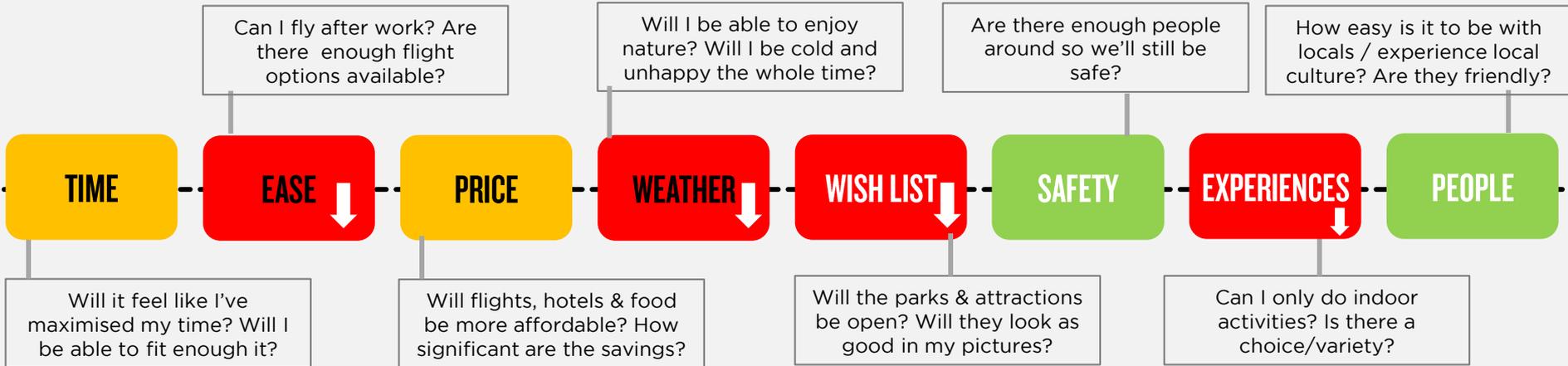
THOSE WHO HAVEN'T BEEN

“It would be *freezing*. Just look at all of that snow. I'm already thinking I'd need to go out and get a whole new wardrobe because I don't own anything suitable for cold weather. I'd spend all my time indoors”.

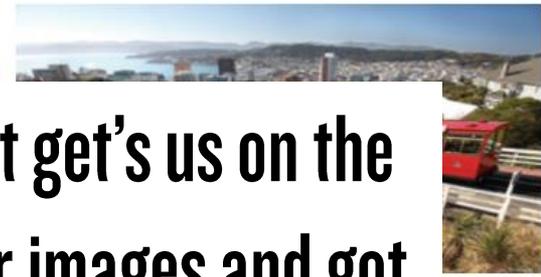
WHAT THIS MEANS: We are starting from a cold place. US travellers need reassurance that they won't have a bad time so need to be promised something winter offers, that no other season does



Summing it all up – The considerations for NZ IN WINTER



WHAT THIS MEANS: We need to offer solutions to all of the above to remove barriers to coming to NZ during winter... we'll also need to inspire them....



So what's the version of our winter we can tell that get's us on the list. We gave them a look book filled with NZ winter images and got them to pull out those that sold a NZ Winter for them





Their typical reaction upon seeing the images:

SELECTION OF IMAGES THAT PROVOKE REACTION



“A NZ winter doesn't look as bad as what I thought it would be:”

“It just looks like our fall... so you can still get out and do things”

“It is **not just snow and ice**. Actually you have **people outside** enjoying themselves”

“There is a **real range of activities** to choose from... anything from white water rafting to hot water pools”

“Because I'm not a skier it is nice to know there is **something for me to do there**”

“It really doesn't look that cold really. It actually looks **very green**”

“The shots of **mountains and sunshine** show you can experience the full variety of nature”



They were clear on what they didn't want from a winter break ...

THE MOST POLARISING IMAGES OF WINTER



1. **IT'S NOT A COSY CABIN IN TAHOE** – They can get that in the USA if they want and it's closer, cheaper & familiar
2. **IT'S NOT ABOUT ALL ABOUT SNOW** – As soon as they see snow, they think they will freeze and don't have the right gear, which drives us further down the wish list. Snow = less comfort
3. **IT'S NOT ABOUT GETTING AWAY FROM THE HEAT** – Most of those we spoke to like the heat, it's why they choose where they live... talking temperature opens a can of worms (what's high for one person is low for another)
4. **IT'S NOT ABOUT CONCERTS & INDOOR SPORTS** – They are looking for nature & unique features. They believe US provides enough culture through exhibitions and events so don't seek this from us



We need to show they can do as much in winter as summer

THE TOP PERFORMING IMAGES OF WINTER



1. **PENGUINS ROCK** – amazing how many were aware that we had penguins, and their response when they saw them in the look books
2. **CITY IS CRITICAL** - presents view of a balanced vacation. Adventure with the comforts of a hotel/night life
3. **STARS CAPTURE ATTENTION** – a clear night sky is something that they don't get to see, esp. in LA.
4. **HOT SPRINGS / THERMAL** – water is relaxing – thermal, natural springs rejuvenate, which feel luxurious
5. **QUALITY FOOD & WINE** – choice food & quality wines is something they have in US & actively seek on vacation
6. **CAVES / HOBBITON** – experiences to see something unique to NZ from films is compelling
7. **MAORI** - interest to learn a little of our indigenous culture



We went into the groups with **8 DIFFERENT WAYS** to talk about a NZ winter...

WINTER IN NEW ZEALAND – WHERE THE ADVENTURE BECOMES MORE EXTREME

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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.

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



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MAKE YOURSELF AT HOME IN THE WARMTH OF OUR WINTER



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.

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



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

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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.

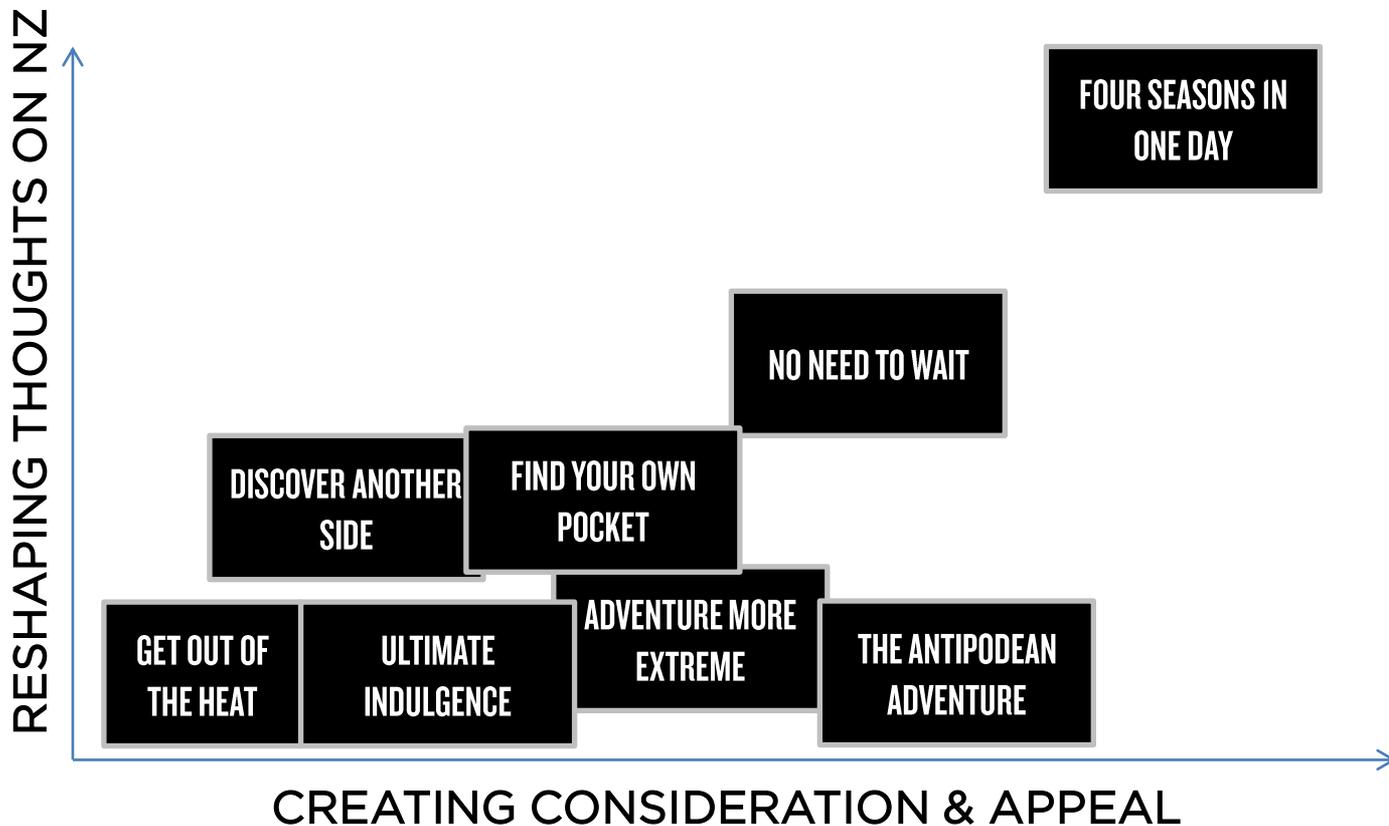
WINTER TIME BRINGS OUT THE BEST OF THIS VARIED NATURAL PLAYGROUND... WHAT COULD BE BETTER STARTING THE DAY WITH WALK THROUGH HOBBITON, BEFORE DISCOVERING A VINEYARD FOR LUNCH... FINISHED WITH A RELAXING SOAK IN A HOT WATER SPRING, SURROUNDED BY ANCIENT NATIVE FOREST.

SEE NEW ZEALAND A THOUSAND DIFFERENT WAYS THIS NZ WINTER





At a glance, this is the job they are doing





Let's look at each territory and how they performed in detail



A reason to leave US and go anywhere, not a confident call to New Zealand

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 RESPITE.

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

“I’m over the hot weather. I’m looking to escape”

“Heat is what I love about LA, not leave!”

“I don’t think you really know what we mean when we say heat. We can handle it”

WHAT THEY LIKE

IT SPEAKS TO A RELEVANT TRUTH – esp. in recent years, the weather has been very hot & almost unmanageable (LA, SF, HU)
IN SUMMER IT TRIGGERS CONSIDERATION – it makes travellers think about vacations
IT MAKES SENSE WHEN IT’S CONSTANTLY HOT – it feels like a logical argument esp. in states like HOU

WHAT THEY LIKE LESS

A LOT OF US TRAVELLERS LOVE THE HEAT – for some they see it as being the best part of their year; BBQs, swimming & sunshine
IT’S A REASON TO LEAVE, NOT TO COME – it doesn’t promote NZ. Many US travellers can escape by travelling domestically, which is affordable & convenient.
IT IS A HOOK – not a reason to come

Mental availability

TIME	EASE	PRICE	WEATHER
------	------	-------	---------

WISH LIST	SAFETY	EXPERIENCES	PEOPLE
-----------	--------	-------------	--------

Physical availability

LA	SF	HU	NY	TRAVEL AGENTS
They love the heat, so don't want to leave	The weather is not as hot as people think	Most true for HOU where it is very hot	NYC is more humid than hot	Like the claim as it's a conversation starter

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Easier sell for Travel Agents but makes New Zealand feel like just an add on to Australia

IN THEIR OWN WORDS

“I suppose that makes sense. NZ is like the Hawaii of USA – go there after the real USA”

“As a travel agent I love this - I’m saying tick off two great destinations. It’s more choice”

“I think it makes NZ look inferior”

WHAT THEY LIKE

RELEVANT FOR TRAVEL AGENTS – reflects the reality of booking both destinations as part of one trip, so presents a strong case
GUARANTEES SOME GOOD WEATHER – most know that AUS has sunshine all year
TWO OFF THE BUCKET LIST – gives travellers a chance to do 2 countries cost effectively

WHAT THEY LIKE LESS

WE ARE PROMOTING AUSSIE INSTEAD OF NZ – they suggest it makes them feel like we are underselling the value of NZ.
AUSSIE IS BIGGER & NEEDS MORE TIME – they assume they would need to dedicate most of their holiday in AUS
NOT CONFIDENT – not a NZ call to action

Mental availability

WISH LIST

SAFETY

EXPERIENCES

PEOPLE

TIME

EASE

PRICE

WEATHER

Physical availability



Feel like they would have to choose



Undersells NZ which has more culture



Makes trip feel like it needs more time



Undermines NZ & calls visiting into question



Combining both enables clients to tick 2 off wish list



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A plea for visitors rather than promising to sell anything truly unique

IN THEIR OWN WORDS

“You have it all & it’s all there, any time”

“Having NZ to yourself is really appealing because it means you beat the crowds and don’t have to compromise”

“It makes me think no one else will be there so it’ll be a lesser experience”

WHAT THEY LIKE

ACTIVITIES – in line with what they expect and associate with a NZ holiday – a real range of things to do

PRECIOUSNESS – the idea of discovering something not all experience

HAVING THE BEST – no need to compromise if you travel outside of peak season

WHAT THEY LIKE LESS

TONE – feels more desperate, rather than confident in our invitation – ‘why would people wait if it’s so good?’

THOSE WHO MAKE IT OVER – implies that NZ is a long way away

WHY WINTER? – beating crowds is not as compelling as seeing a unique version of NZ

Mental availability

WISH LIST

SAFETY

EXPERIENCES

PEOPLE

TIME

EASE

PRICE

WEATHER

Physical availability



Like the exclusivity it implies



Sceptical it’s over promising



Like the strong call to action



Looking for more than come now



Like the reassurance that NZ is open



Anything to the extreme has niche appeal... it's only 'meant' for a select few

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IN THEIR OWN WORDS

“I can see myself doing that... it makes me want to change my schedule & got to NZ in the winter”

“That could be a way to see it but it's a bit too extreme for me!”

“I like it, and when I was there I did the zip lining... but it might just be a bit tiring”

WHAT THEY LIKE

- GLACIERS / GORGES** – something they can't experience in the US easily or knowingly
- ACTIVE HOLIDAY** – the type of holiday they expect from NZ. It delivers to our promise of outdoors and new experiences
- YOUNG & ENERGETIC** – feels like you can do & experience a lot if you are adventurous

WHAT THEY LIKE LESS

- ACTIVE WITHOUT THE RELAXING** – want to know there is luxury to come back to
- FEELS DANGEROUS FOR SOME** – outside of their comfort especially in the snow (!)
- NO CULTURE** – implies you have to 'do' to experience NZ, rather than just be, which can put older travellers off coming





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Relaxation is what they seek from a holiday, but is not a reason to come to NZ

IN THEIR OWN WORDS

“It feels like something I’d do with my wife, but leaves our daughter out”

“Although relaxation is on my list if I’ve gone all the way to NZ I want to have adventures”

“I’m a full time mum so this looks perfect. I’d go for a week with my husband to reconnect”

WHAT THEY LIKE

GETTING AWAY, RELAXING & RE-ENERGISING – what you really want from a holiday
WHILE THE REST OF THE WORLD STAYS AWAY – addresses a pain point with travelling during peak season in Europe
PERSONALISED – ability to be able to pick & choose, and do what you want to do

WHAT THEY LIKE LESS

FEELS LIKE A SHORT BREAK – something they could experience after a shorter flight, rather than making the effort to come to NZ
PASSIVE – the holiday is slower vs. what some look for in a two week adventure
ONLY FOR COUPLES – feels overly romantic, rather than a family proposition

Mental availability

WISH LIST

SAFETY

EXPERIENCES

PEOPLE

TIME

EASE

PRICE

WEATHER

Physical availability



Couples consider it a romantic getaway



Doesn't offer anything 'cultural'



Not as inclusive as they'd hope



Appealing to entirely disconnect, just far



Concern it does not have wide appeal



Culture is part of the experience – it's not the primary driver to visit

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IN THEIR OWN WORDS

“I like the cultural aspect.. I feel like it shows the real side of NZ”

“I think Maori would be really interesting, I just wouldn't want only that”

“It is what is unique about NZ but it doesn't interest me if I'm honest”

WHAT THEY LIKE

SHARING STORIES WITH LOCALS – makes them imagine an authentic experience
INDIGENOUS MAORI – something different and unique that they have not experienced before
LIVE LIKE A LOCAL – the idea of avoiding touristy activities appeals to everyone

WHAT THEY LIKE LESS

ONE DIMENSIONAL – one version of a NZ holiday where you'll have to concentrate & engage with only the history of the country
FEELS OVERWHELMING – by contrast to other spaces, there are too many people which feels less exclusive
SEDENTARY – less activity, instead talking

Mental availability

WISH LIST

SAFETY

EXPERIENCES

PEOPLE

TIME

EASE

PRICE

WEATHER

Physical availability



Too much energy to focus on learning



Culture is readily available in SF



Feels intimidating as they look different



Cultural difference is part of NY life



Feels like a short trip with niche appeal



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MAKE YOURSELF AT HOME IN THE WARMTH OF OUR WINTER



There are places closer to home that do a better version of indulgence

IN THEIR OWN WORDS

“Enjoy the best in one of our unique lodges”

“It could be any resort in Colorado or Aspen in my opinion. There’s nothing that says NZ”

“20F? That’s freezing. I know you’re in the mountains but I don’t have any clothes for that weather. It wouldn’t be relaxing”

WHAT THEY LIKE

THE IDEA OF A LITTLE BIT OF INDULGENCE – treating themselves and doing special things on vacation does appeal
IMAGES OF SOCIALISING – connection to local people & family is part of relaxing
LITTLE BIT OF COSYNESS – baths & creature comforts talk to a need for relaxation

WHAT THEY LIKE LESS

SELLING OURSELVES SHORT – perception that we have more to offer than this
AGAIN MORE OF A LONG WEEKEND, RATHER THAN A VACATION – too passive and misses why they are there... being able to see & experience NZ
-5C IS FREEZING – temperature is off putting

Mental availability

WISH LIST

SAFETY

EXPERIENCES

PEOPLE

TIME

EASE

PRICE

WEATHER

Physical availability



No different to what they get in US... just colder



Doesn't justify the distance to get to NZ



Being cold is not relaxing, even inside



Not that cold but wouldn't want to leave the NY heat



Like the mention of high end luxury

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SEE NEW ZEALAND A THOUSAND DIFFERENT WAYS THIS NZ WINTER



Promises them something many have never seen before... variety of experience *because* of the seasons

IN THEIR OWN WORDS

“This opens my imagination and gets me thinking, ‘what does that look like’.”

“This is how I picture NZ in my mind. It’s why the nature is so amazing... changing seasons”

“You can switch what you do depending on the weather. No day is ever the same”

WHAT THEY LIKE

EVERYTHING CLOSE – sense of being able to experience everything with an hours drive

DIVERSE EXPERIENCE – snow sports to outdoor dining to indoor activities to outdoor activities

SEASONS – something that LA, HOU & SF don’t have readily... totally unique to NZ

WHAT THEY LIKE LESS

NOT MANY PEOPLE – images create the impression there aren’t many people in NZ
LIKE THE IDEA, BUT WOULD NEED LOTS OF LUGGAGE – creates the impressions you need to pack a lot to cope with variability
EVERYTHING IS CHANGING ALL THE TIME – may not be as relaxing as they hope

Mental availability

WISH LIST

SAFETY

EXPERIENCES

PEOPLE

TIME

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WEATHER

Physical availability



Completely different to what they experience



Creates a unique reason to choose NZ



Completely different to what they experience



Presents a reason to travel the distance



Feel there is a lot of choice to offer clients

So what have we learnt and how do we present the **MOST**
COMPELLING NZ Winter Proposition moving forward?

Recommendations



So what are the jobs we are looking to achieve in US Summer / NZ Winter?

**FOR US
TRAVELLERS &
TRAVEL AGENTS**

Deliver same, same but
different in an easy way

**FOR AUCKLAND
AIRPORT**

More bookings and more
flights all year round

**FOR NEW
ZEALAND**

Better experience when
they are here in NZ



How do we deliver same, same but different?

**FOR US
TRAVELLERS &
TRAVEL AGENTS**



Deliver same, same but different in an easy way

**WE NEED TO BE PHYSICAL
AVAILABLE...**

Make it easy in the months where I'm in the international vacation mind set and ensure direct flights are available when I want to travel

**AS WELL AS APPEALING TO
THEIR MENTAL AVAILABLE...**

Show the 'same' to reassure so I feel safe but also show me 'difference' to excite- variety of experiences is crucial to me so that NZ makes the wish list





How do we increase numbers of visitors in Winter?



More bookings and more flights all year round

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If our aim is solely to fill the front end of the plane and simply increase visitation numbers a dual proposition with Australia is a compelling offer for Travel agents to sell, sell, sell. This is an opportunity...

BREAKING DOWN WHAT WORKS TO INCREASE NUMBERS... & WHAT DOESN'T

DRIVES UP WISH LIST

Appeals to social status as shows they've been all the way down here

FEELS LIKE MORE

There is more to choose from in terms of activities. Weather is better

WARRANTS THE FLIGHT

Helps rationalise the flight time if seeing two countries, not one

UNDERSELLS NZ

Presents a risk if NZ becomes optional. We go back to square one



How do we ensure we deliver to expectation as a destination?



Better experience when they are here in NZ

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To ensure that New Zealand as a destination delivers to expectation, the concept of four seasons in a day and variety of experiences on offer works best

BREAKING DOWN WHAT WORKS BEST ABOUT THE CONCEPT OF 4 SEASONS

POSITIVE CHANGE

New growth & new experiences. Higher energy than 'winter'

TALKS TO DIFFERENT

Variety and perspectives, which delivers uniqueness, not niche activity

ASSOCIATED WITH NATURE

Aligns closely to what NZ is known for meaning we can leverage

DOESN'T OVERPROMISE

Manages expectations about the weather, which is more genuine



Four Seasons in a day communicates that US travellers can have a VARIETY OF DIFFERENT EXPERIENCES IN ONE TRIP, which is what is unique and compelling about our proposition.

It is not about a desire to experience all four seasons in one go – but rather the idea suggests they can have it all in one trip



So what does Four Seasons look like?

SPRING

Lots of lavender plants just in bloom, with greenery

SUMMER

T-Shirts & shorts and the bright blue in the light of the sun

WINTER

Snow capped, dramatic mountains in the background

AUTUMN

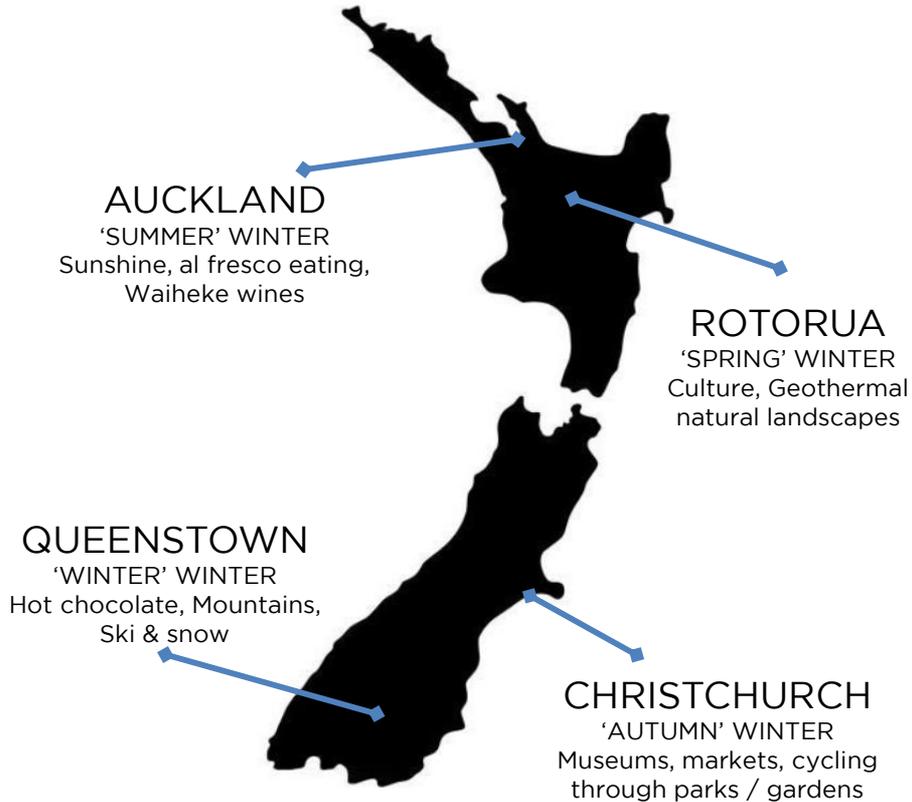
Clay coloured pathway that looks dry and passable



It's about encapsulating the feeling of the seasons as a means of communicating the uniqueness of NZ



How could it look when thinking about NZ as a whole?



Everything is close so variety of experience is possible even in a short trip from USA

Although Touring is possible, why not experience different cities / regions that showcase a different side to New Zealand so that you see and experience the uniqueness we have on offer (hub & spoke)

You can choose the type of trip you are looking for – the options are available and easy for you to navigate

WE DON'T CANNIBALISE SUMMER & HAVE A CONCEPT THAT TALKS TO ALL NON-SUMMER MONTHS



What would a communications campaign look like?

BACKGROUND

- US carriers, United and American Airlines are flying and filling planes arriving into Auckland during NZ Summer. However, they have decided to reduce the number of flights during our shoulder and winter periods due to perceived lack of demand. As part of a research project, we engaged consumers in LA, SF, HOU and NYC to understand their appetite to travel during these times and we discovered there is desire. Our challenge is how can we keep planes flying to Auckland during shoulder & winter.

WHAT ARE THE BUSINESS OBJECTIVES

- We are looking to bring to life the ultimate proposition to encourage US travellers to visit NZ 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 during this time of year because US travellers are open to coming.

SUCCESS MEASUREMENTS

- NZ is seen as a relevant destination for US travellers in our winter and shoulder seasons
- For those that come to NZ, the country still exceeds expectations of what they are looking for
- International carriers continue to fly during the winter months

WHAT DO WE MOST WANT TO CHANGE?

- That NZ is cold and there is nothing to do here in winter

WHO ARE WE TARGETING?

- Primarily US travellers from direct flight departures (LA, SF, HOU) who have already been to Europe, enjoy nature and being active and are more intrepid.

CREATIVE DIRECTION

- Variety of nature & activities that you can pick and choose from across the country with the changing views depending on where you are. Diversity of environment & colours that reflect the variation in moods and sensory experiences you can have
THINK: red sunsets for warmth & cosy, bright blue skies for spring and activity
- Feelings that different seasons provide - warmth, freedom, newness that are link with different experiences in NZ
- Juxtaposition and contrast of activities that showcase more active and passive experiences THINK: hot pools then hiking

CHALLENGES

- Not executing the idea of four seasons in a day too literally - it is the idea of what variable experiences they will have that truly appeals. Seasonality provides a unique metaphor to use that talks to changing perspectives and changeable environments
- Tonally being realistic - we want manage expectations, so being genuine and positive is important.



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