

# INCREASING CONSIDERATION OF THE AUSTRALIAN MARKET... INTO WINTER

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Prepared for AIAL  
By Big Picture 2018





# The how & the who



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

## 6 IN MARKET FOCUS GROUPS & 9 IN DEPTH INTERVIEWS:

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

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

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



### BRISBANE

- 1 HAVE BEEN TO NZ IN WINTER FG
- 1 NOT BEEN TO NZ IN WINTER
- 3 CONSUMER IDIs

### MELBOURNE

- 1 HAVE BEEN TO NZ IN WINTER FG
- 1 NOT BEEN TO NZ IN WINTER
- 3 CONSUMER IDIs

### SYDNEY

- 1 HAVE BEEN TO NZ IN WINTER FG
- 1 NOT BEEN TO NZ IN WINTER
- 3 CONSUMER IDIs

# **3 OBSERVATIONS WE HAD ABOUT THE AUSTRALIAN TRAVELLER**







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



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

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



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



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

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



### 3. F&B can make or break the trip



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

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





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





# SYDNEY - WHERE YOU WORK HARD FOR YOUR MONEY

- **A CITY WHERE THEY ARE FOCUSSED ON GETTING AHEAD** – there is a level of ambitiousness that perforates everyday life. The standard of living is high, which is reflected in the salaries paid & rents paid out. There is an attitude where you can always do more, which everyone feels the edge of
- **A LIFESTYLE THAT'S TIME POOR BUT PLACES EMPHASIS ON STYLE** – use of words like hectic & frantic are commonplace. There is a direct correlation between busyness and success in the eyes of Sydneynites. Not uncommon to see business men in suits down the pub most evenings
- **PEOPLE WHO HAVE A MORE INTERNATIONAL VIEW OF THE WORLD** – a travel hub that means they are spoilt with where they can visit & travel. The bar is also set high because of this when it comes to what's worthy of a trip in their eyes. They look to appear worldly wise – a lot of social currency in travel

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

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

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



# MELBOURNE – A COLLECTION OF ALTERNATIVES

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

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

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

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



# BRISBANE - A TOWN VIBE IN A CITY

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

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

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

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

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

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

An aerial photograph of a vast, bright blue sky filled with numerous white, fluffy clouds. Sun rays are visible in the upper portion of the image, creating a sense of depth and brightness. A semi-transparent white rectangular box is centered horizontally across the middle of the image, containing the text.

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



# Independent Professionals – Seeking CONNECTION with others & themselves

GETTING AWAY FROM A  
LIFE THAT IS...

## STRESSFUL

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

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

## NATURE

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

WHICH MEANS, HOW  
THEY TRAVEL....

## COUPLES / INDIVIDUALLY

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

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

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

GETTING AWAY FROM A  
LIFE THAT IS...

## **ROUTINISED**

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

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

## **SAFE ADVENTURE**

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

WHICH MEANS, **HOW**  
THEY TRAVEL ....

## **WITH EASE & CONVENIENCE**

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

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

A close-up photograph of an older couple smiling and embracing each other. The man is on the left, wearing a dark blue jacket, and the woman is on the right, wearing a plaid shirt. They are both looking towards the camera with joyful expressions.

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

GETTING AWAY FROM A  
LIFE THAT IS...

## DEFINED BY SAMENESS

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

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

## MODERN COMFORTS

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

WHICH MEANS, HOW  
THEY TRAVEL ....

## FOR LONG HOLIDAYS IN GROUPS

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

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

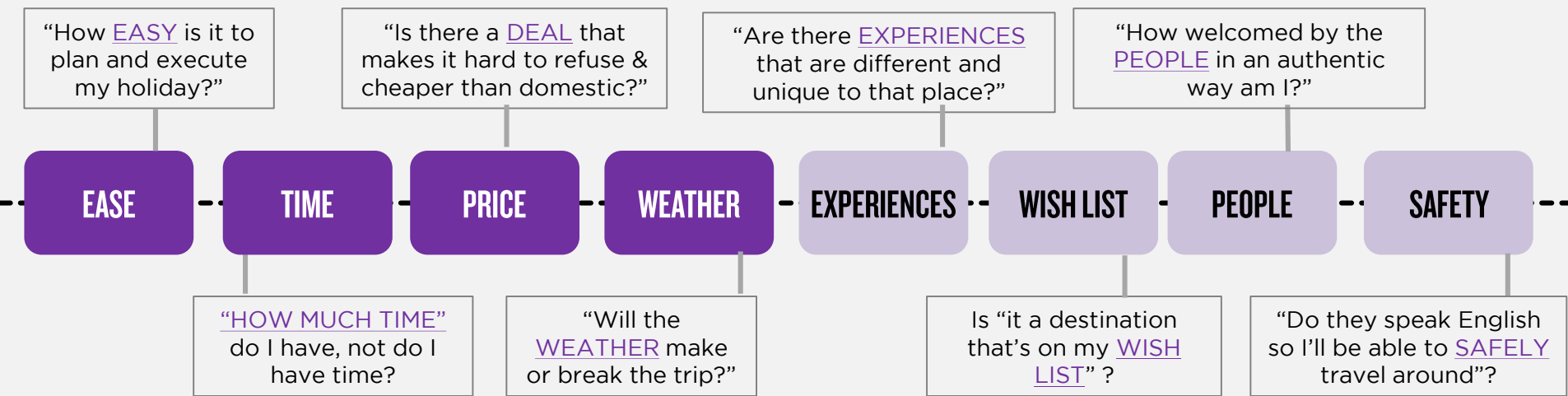




**What are the key considerations that influence HOW THEY  
BOOK a holiday?**



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



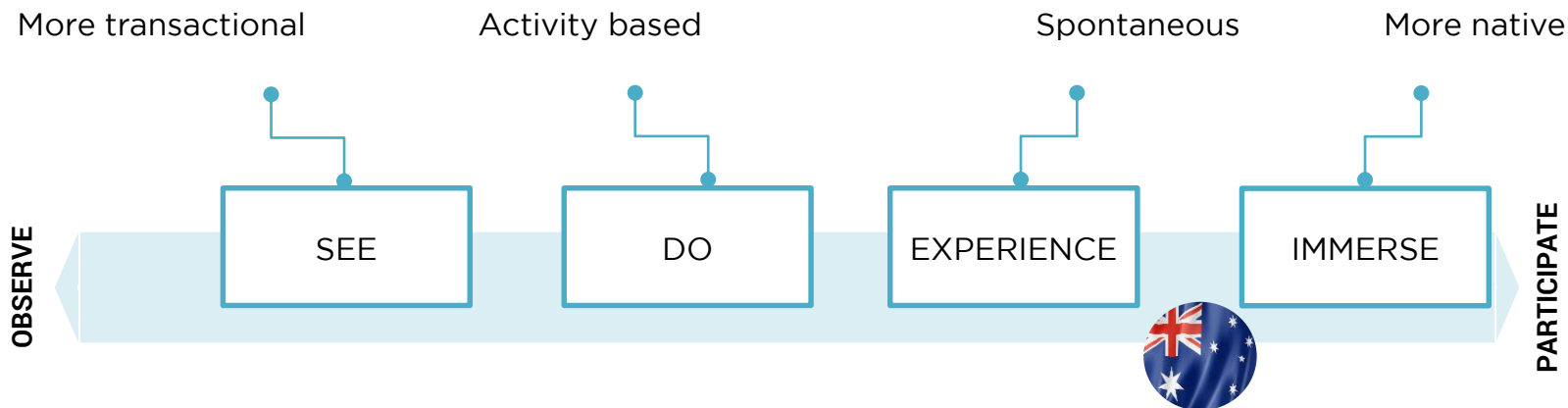


**HOW INVOLVED are they looking to be when it comes to experiences on holiday?**





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



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



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



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

An aerial photograph of a vast landscape. A winding river flows through a green, hilly area. In the background, a large body of water is visible under a bright blue sky with sun rays emanating from the top center. The text is overlaid on a semi-transparent white rectangular box in the center of the image.

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





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

REALNESS THAT DOESN'T  
FEEL ENGINEERED FOR  
VISITORS

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



COMBINED WITH DISCOVERY  
WHERE YOU 'STUMBLE'  
ACROSS EXPERIENCES

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

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

A wide-angle photograph of a coastal scene. In the foreground, a sandy beach stretches across the frame. A person is walking away from the camera towards the ocean. To the left, a large, dark rock formation juts out into the water. In the background, a prominent rock formation features a natural sea arch. The sky is filled with soft, white clouds.

# **What about NZ?**

## **Five observations**



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



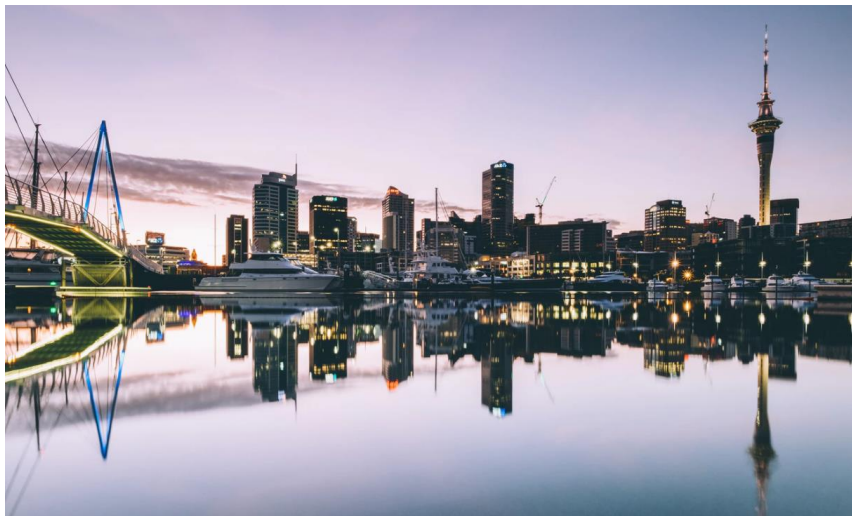
- **BELIEVE THEY HAVE 'SEEN' IT BEFORE:** THEY THINK THEY KNOW WHAT IT'LL BE LIKE WITHOUT COMING. In particular that....
  - Auckland will be like Adelaide
  - People are just like them
  - Landscapes are really not that dissimilar to Tasmania
- **WHICH IS WHY NZ GOES TO THE BOTTOM OF THE BUCKET LIST:**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

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





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



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

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



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

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

NATURE & LANDSCAPES

Friendly, but also very laid back

PEOPLE & CULTURE

ACTIVITIES & EVENTS

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

HISTORY & ARCHITECTURE

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

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



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

### SOUTH ISLAND – THE ESSENCE OF NZ

ORDER OF MENTIONS

**QUEENSTOWN** – a wish list destination, & packages up everything that defines NZ

**NATURAL BEAUTY** – snow covered mountains with long open roads

**MILFORD SOUNDS & TRACK** – iconic hiking & walking that they can't experience in AU

**CHRISTCHURCH** – particularly EQ, but also an entry hub to the SI

**SKI** – better skiing than Australia, and for many a sole reason for a trip if they are enthusiasts

**WINERIES** – know there are noteworthy wine regions down south

### NORTH ISLAND – THE BUSY HALF

ORDER OF MENTIONS

**AUCKLAND** – the only city we have

**BAY OF ISLANDS** – consistently comes up

**MAORI CULTURE & ROTORUA** – particularly Rotorua (as it is part of a nursery rhyme they all learn as children; but also throughout the Island)

**WAITOMO CAVES** – growing in popularity and in Aussies' awareness

**HOBBITON** – known as a site they want to visit. Not always considered a N. Island based activity

**POPULATED** – towns & cities, and less nature as a result so less picturesque and beautiful

**More different from their ordinary**

**Closer to their ordinary**





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

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

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

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



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

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



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

EASE

TIME

PRICE

WEATHER

EXPERIENCES

WISH LIST

PEOPLE

SAFETY

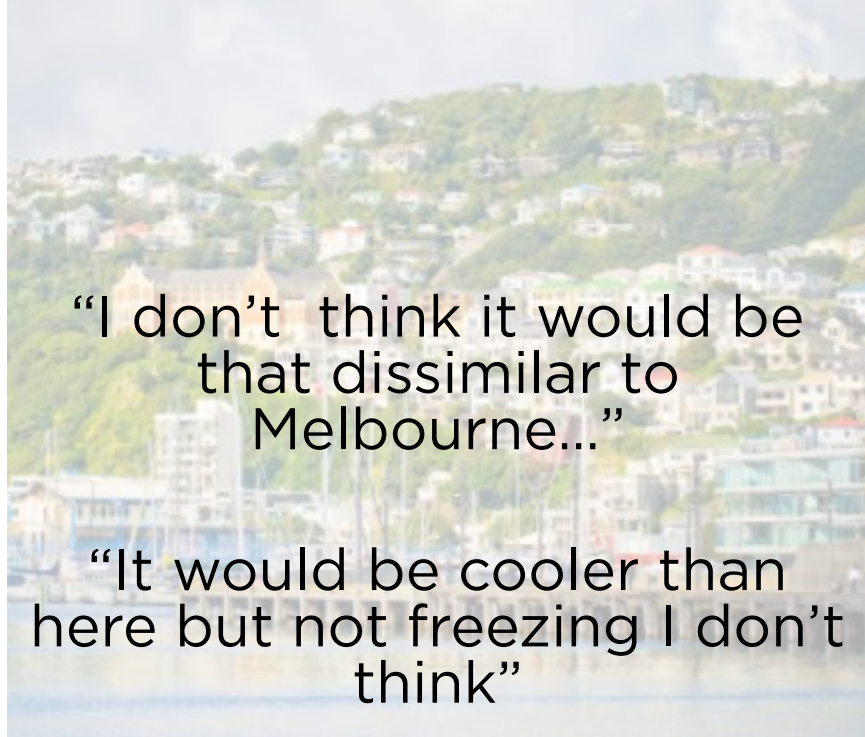
**WHAT IS NEEDED TO INCREASE OFF PEAK BOOKINGS** : the challenge is to appeal to Aussies' mental considerations so that they are convinced there's enough to do so there is value in coming



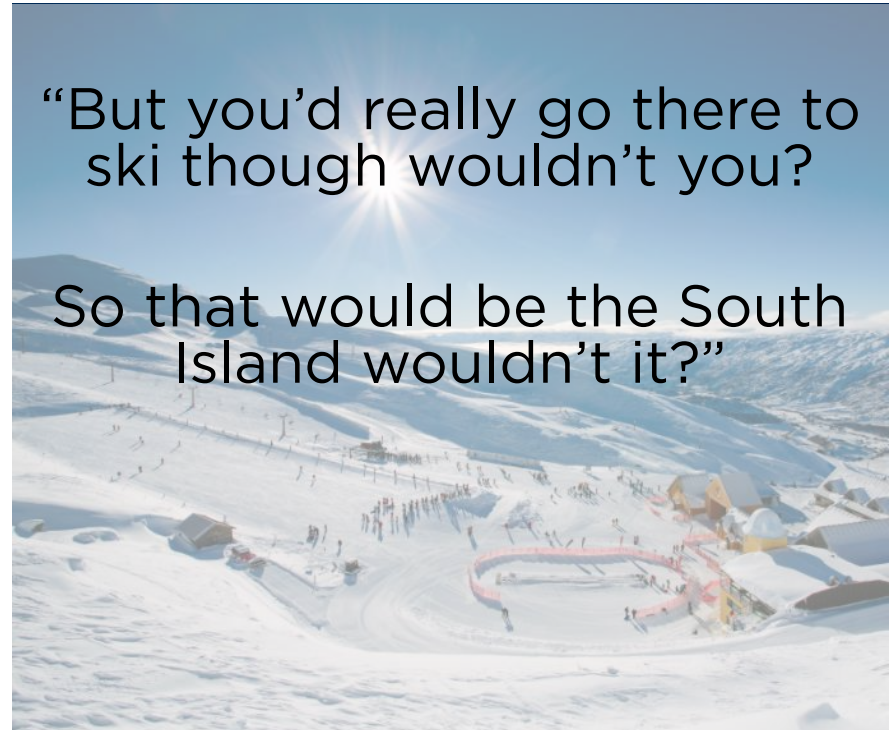
**What are Australians' expectations for WINTER IN NZ?...**



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



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



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



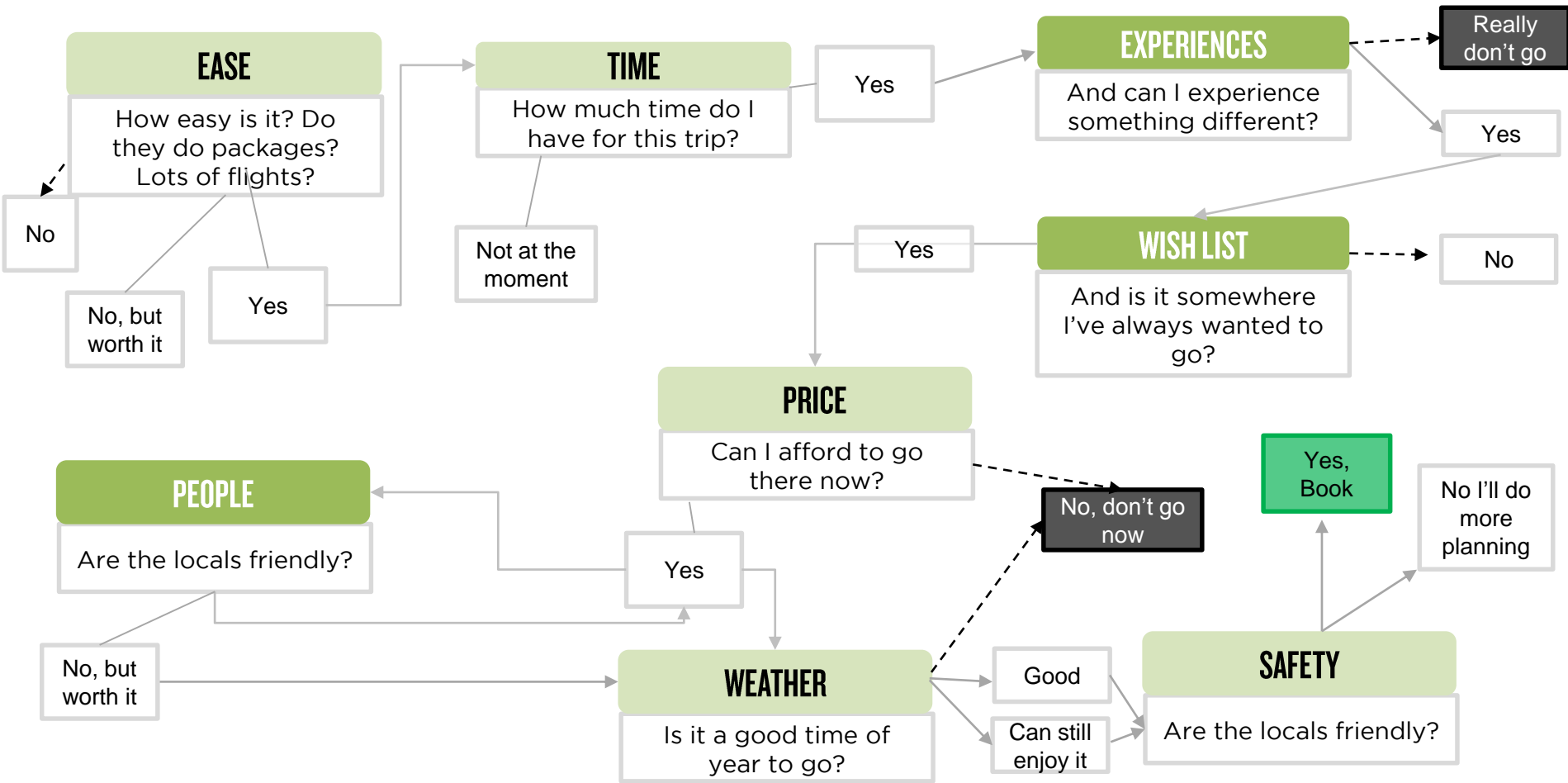
**NZ WINTER begins to feel more complicated when it comes to planning a route in challenging weather conditions. Experiences are largely considered Ski dominant, which can feel limited driving us down the wish list**



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



# If Aussies don't think they'll be able to experience as much, NZ falls down the considerations list



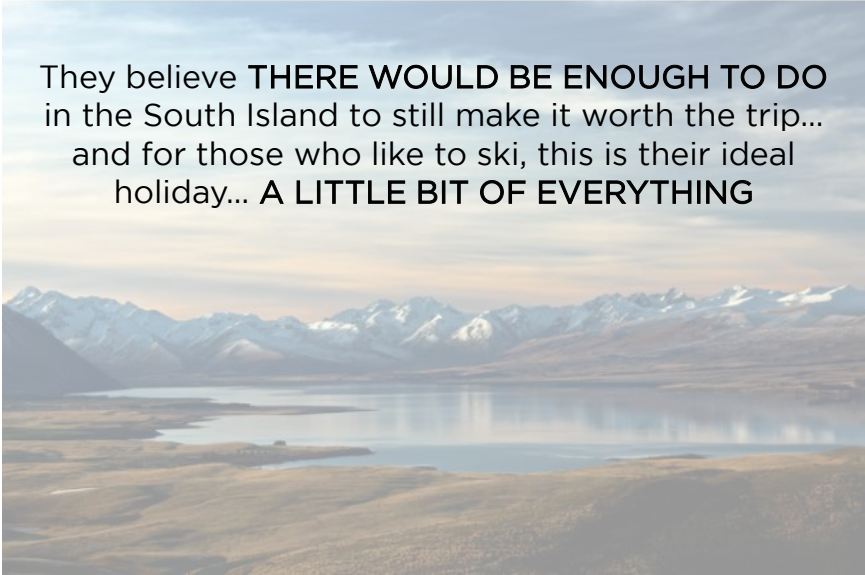


A group of five diverse young adults are gathered on a sandy beach, smiling and posing for a selfie. In the foreground, a hand holds a camera, with a bright green wristband visible on the person's arm. The group consists of three women and two men, all appearing happy and engaged. The background shows the ocean waves under a bright, sunny sky.

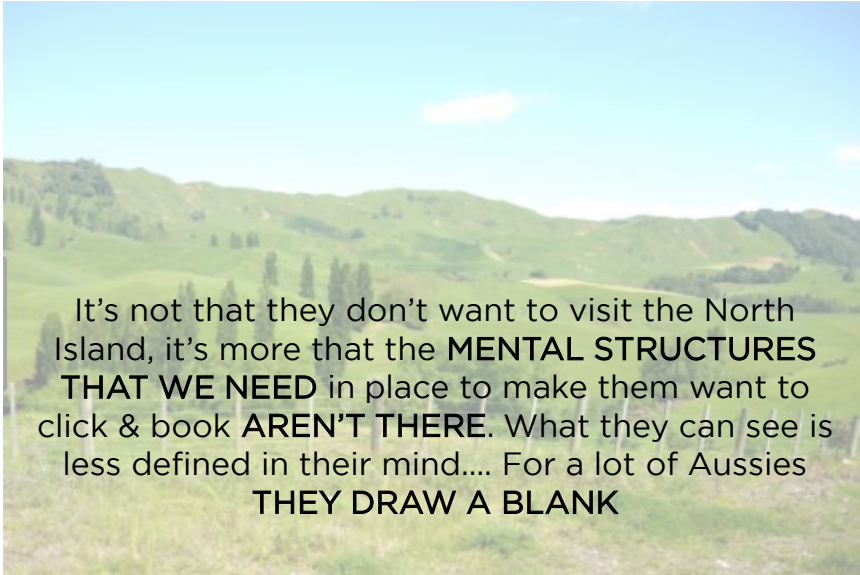
We need to **SHIFT THE MIND SET** from 'can't do in Winter' to  
'can do in June'



# South Island is an easier Winter sell

A wide-angle landscape photograph of the South Island of New Zealand. In the foreground, there's a calm lake reflecting the sky. In the background, there are snow-capped mountains under a cloudy sky.

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

A landscape photograph of the North Island of New Zealand. It shows rolling green hills with some trees, under a clear blue sky with a few clouds.

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

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





## **Creating THEIR IDEAL OFF PEAK HOLIDAY**

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





# Here are some of their ideas...



**NZ WINTER:** *More than you think*

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

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

*Snow capped mountain ranges  
rolling hills  
Giant trees  
fireplace*








tone & attitude that best represents a new zealand version of winter for you:  
(is serious vs. silly, moody vs. bright)

*bright  
clear  
fresh*      *relaxing*



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





**NZ WINTER:**

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

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

*Skiing  
mountains  
wilderness*      *hiking  
good food/wine*




tone & attitude that best represents a new zealand version of winter for you:  
(is serious vs. silly, moody vs. bright, or serious, dry)

*friendly  
fun  
safe / familiar*      *adventurous  
open - spontaneous*



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

*natural beauty  
adventurous activities  
hospitable culture*      *access to alone locations*

**NZ WINTER:** *Discover the cool side of NZ*

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

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

*Ski fields  
Hot springs  
Rolling fields*      *snuggly  
Colder than home.*

tone & attitude that best represents a new zealand version of winter for you:  
(is serious vs. silly, moody vs. bright, or serious, dry)

*hard-boiled, but adventurous.*      *Blessed.*  
*Rustic & unique.*  
*Peace.*

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



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



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

## IN THEIR OWN WORDS

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

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

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

## WHAT THEY LIKE

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

## WHAT THEY LIKE LESS

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

## Maintaining & Shifting four measures that matter most



EASE

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

WEATHER

It shows that the weather will be better than they think

WISH LIST

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



EXPERIENCES

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

NATURE & LANDSCAPES

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

PEOPLE & CULTURE

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

ACTIVITIES & EVENTS

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

HISTORY & ARCHITECTURE

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

A HOLIDAY THAT’S ABOUT ORGANISED ACTIVITIES





100% PURE NEW ZEALAND  
PRESENTS

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

## IN THEIR OWN WORDS

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

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

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

## WHAT THEY LIKE

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

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

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

## WHAT THEY LIKE LESS

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

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

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

## Maintaining & Shifting four measures that matter most



EASE

The info graphic that illustrates distances goes one step further to make the planning easier



WEATHER

It almost begins to promote winter weather as something that enhances the experience!



WISH LIST

Reframes NZ as more exciting place to visit, with high energy – not what they expect



EXPERIENCES

Again showcases diverse range of activities that are available in one trip – something for everyone

NATURE & LANDSCAPES

Imagery of volcanic & geothermal activity is considered very different. Outdoor hot pools consistently came up

PEOPLE & CULTURE

Maori performance more obvious experience for native culture

ACTIVITIES & EVENTS

The number of experiences featured and the ability to do them all as part of an itinerary really well liked

HISTORY & ARCHITECTURE

Not as prominent in the video – definitely space to talk more overtly to interactions with Kiwis in towns

## A HOLIDAY THAT'S ABOUT UNIQUE EXPERIENCES

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

## CONTENT OF VIDEO

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

## EXECUTION – TONE

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

An aerial photograph of a vast landscape. A winding river flows through a green, hilly area. In the background, a large body of water is visible under a bright blue sky with sun rays emanating from the top center. A semi-transparent white rectangular box is centered over the image, containing the text "Strategy & Recommendations".

# **Strategy & Recommendations**





# How to win the Australian market between May – October

1

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

2

Build the desire to come to NZ off peak through itineraries

3

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



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



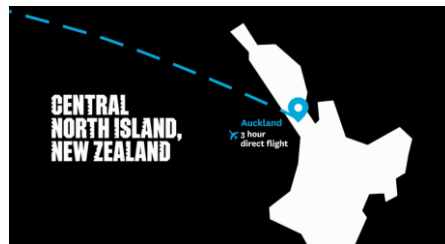
Deliver to the core need of real discovery by having lots of activities to choose from so that they can seamlessly move from one experience to the next. This creates the feeling they don't need to make a route because they are discovering like a local... on their own terms (whilst still presenting options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

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



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

2



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

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



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

3



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

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





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

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

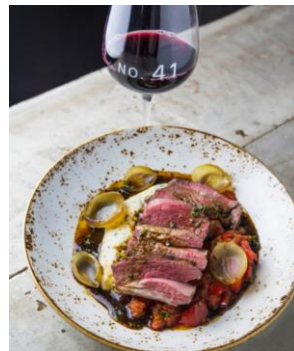
- To increase the prominence and number of experiences featuring F&B

SHOWING A DIVERSE VARIETY OF F&B CHOICES

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

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

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



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



## **THIS HAS BEEN A BIG PICTURE PRESENTATION ...**

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