

INTENTIONS TO TRAVEL TO NEW ZEALAND – ACTIVE CONSIDERER (AC) DEEP DIVES

**Annual deep dive into AC's triggers and barriers to considering
New Zealand in core and emerging markets**

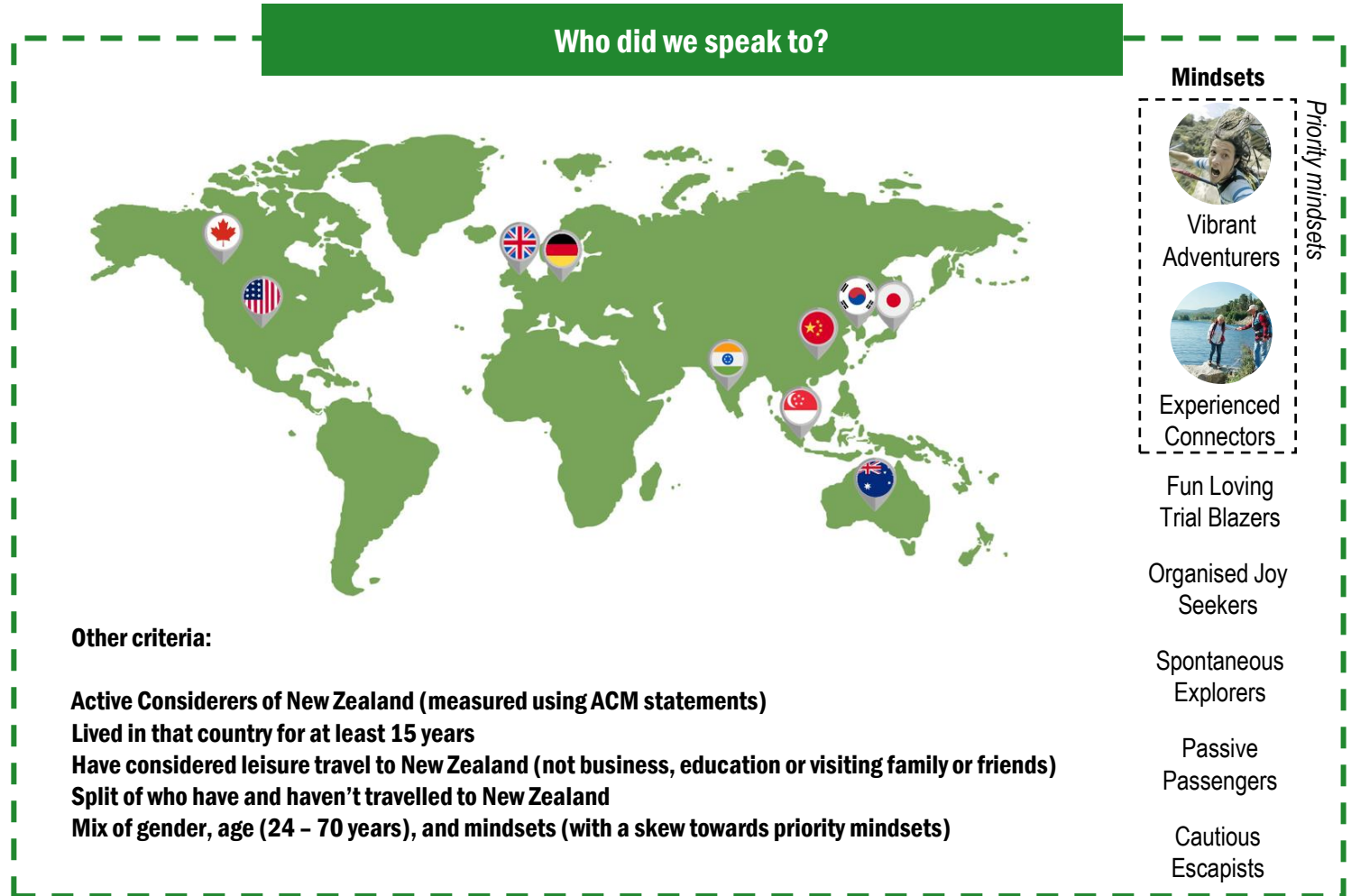
Year 1

Created for Tourism New Zealand by One Picture

March 2023

We completed 50 in-depth 60-minute interviews across 10 core and emerging markets

Australia	N = 6 In-depth interviews (Sydney and Melbourne)
Singapore	N = 6 In-depth interviews
China	N = 6 In-depth interviews (Beijing and Shanghai)
India	N = 6 In-depth interviews (Mumbai and Delhi)
Germany	N = 4 In-depth interviews (Berlin and Frankfurt)
UK	N = 4 In-depth interviews (London)
USA	N = 4 In-depth interviews (LA and Houston)
Canada	N = 4 In-depth interviews (Vancouver)
Japan	N = 4 In-depth interviews (Tokyo and Chiba)
South Korea	N = 4 In-depth interviews (Seoul and Incheon)





PART 1:

The global shifts impacting our ACs travel plans for 2024

What's changing for our ACs and their world

The international traveller market is back...

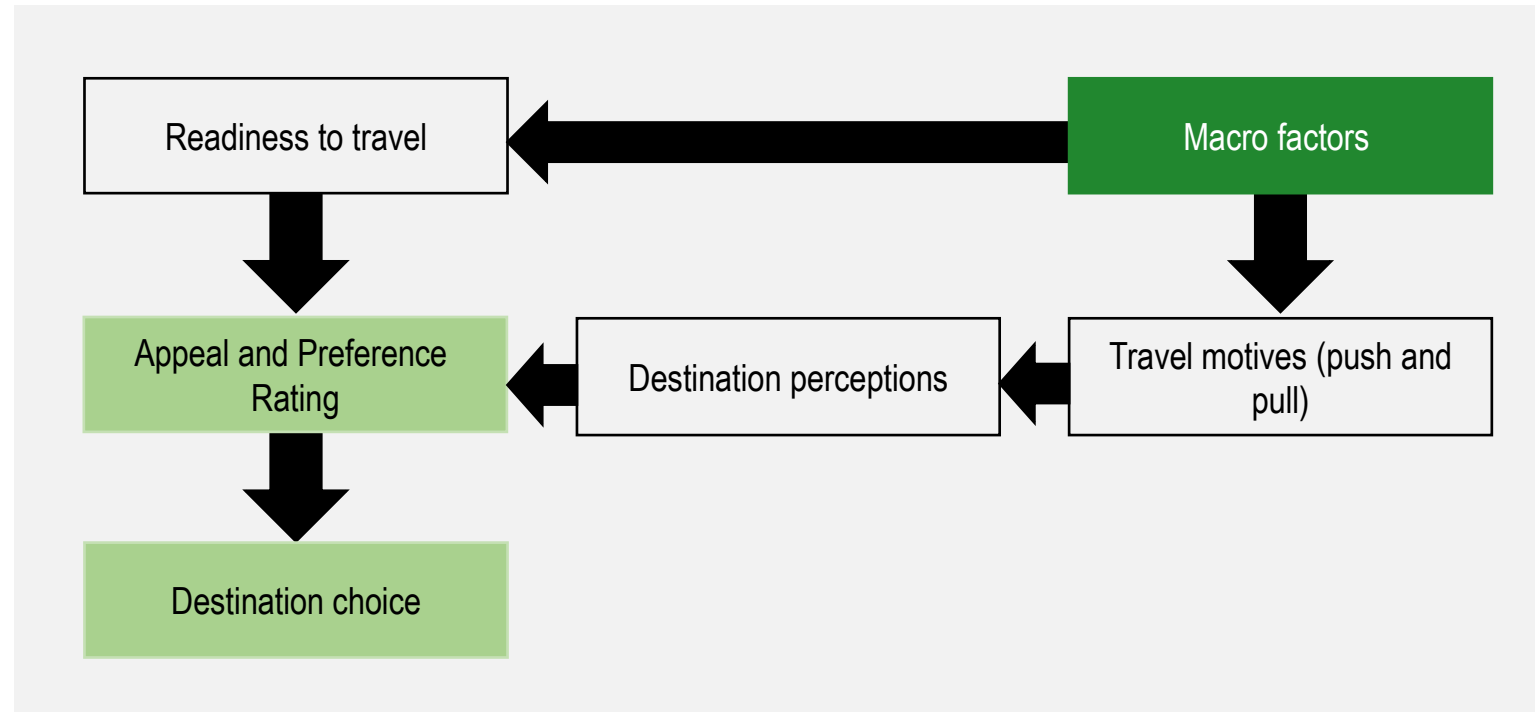
Our conversations with ACs support global data that long haul travel is well and truly on the agenda, with many citing 2023 and/or early-mid 2024 for their next 'big' holiday

"I hated that feeling of being hemmed in... we literally couldn't leave so I'm amping for my next big trip"

"We've missed out on a lot so now just want to make up for lost time and have a release"

To maximise this window of opportunity to grow our AC pool and convert we need to look carefully at:

- Their readiness to travel, especially in long haul, AND:
- The macro trends that affect push and pull factors



SO: Monitoring readiness, especially after significant global events, will help guide the content and timing of our messaging

International travel has had a reset

We found many markets to not yet be 'long-haul ready', which can help explain why appeal and conversion metrics dropped for New Zealand (especially as the question was asked at a time when long haul travel and New Zealand specifically was well off their agenda)

"I couldn't wait to get out and escape from feeling trapped, but I didn't want to risk going too far"



Travelling behaviours are on a continuum for our ACs, some have stayed held back after COVID-19, others are continuing to move forward



Few are domestic

Greater importance placed on avoiding uncertainty and staying safe

The fear of COVID-19 and getting sick was still very real in some markets

NB. They are continuing to save so will have money to spend when they feel confident travelling again



Most are short haul

Some fear getting stuck, and others worry how catching COVID-19 might impact plans

Some markets also enjoy a diverse set of short haul destinations available – e.g. Europe

But we found the preference to stay close to home lessens over time



Long haul is growing

Accelerated back out by pre-COVID-19 travel plans that got affected – cancelled trips

Unless they had friends and family to visit, many haven't done a bucket list long haul trip yet, but it's on the agenda

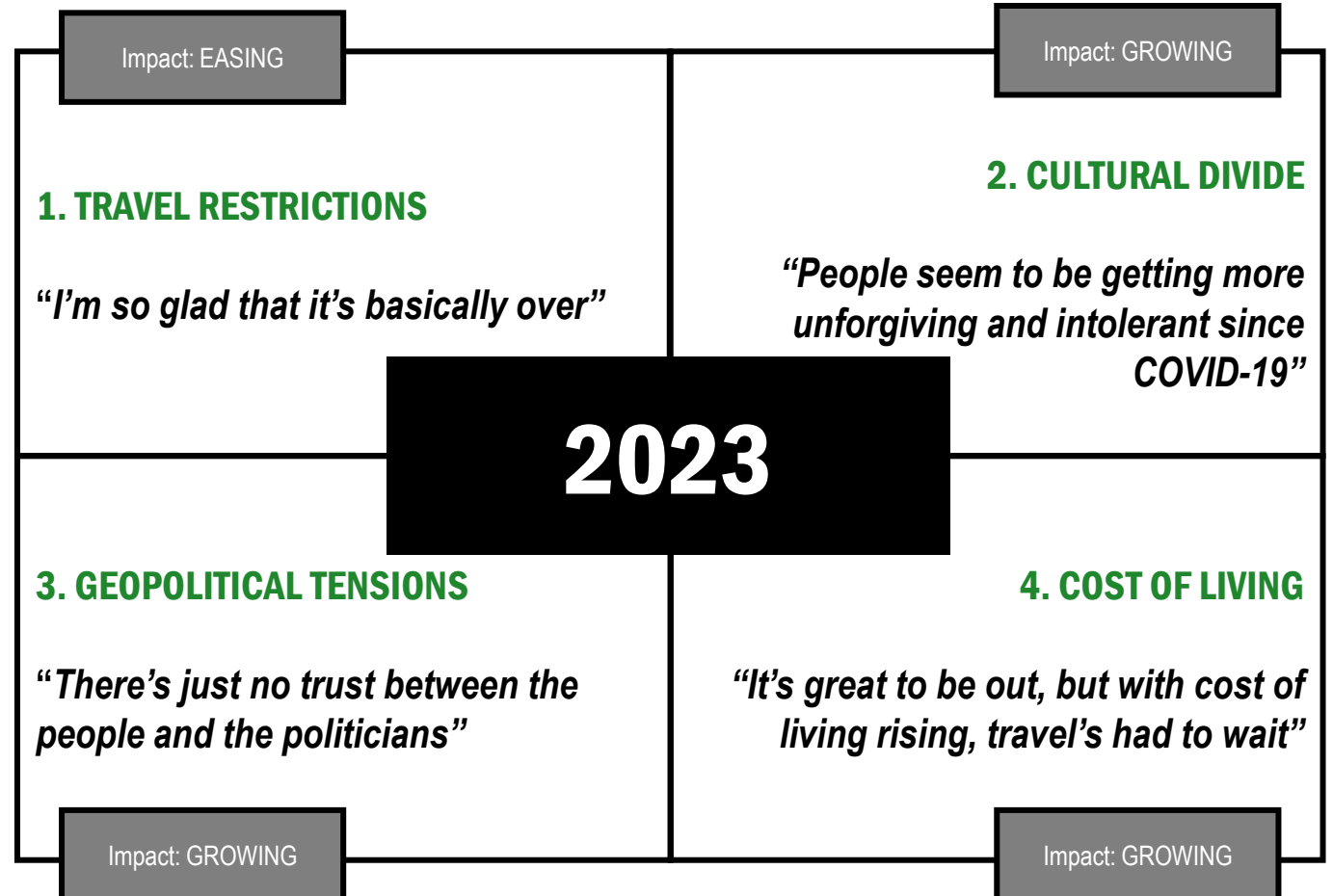
Market and/or mindset seems to play a part in deciding who is ready e.g. Vibrant Adventurers from Singapore seemed most keen

SO: The questions arising within the 'held back' countries is - will they follow steps or leap-frog to long haul?

ACs identified four shifts affecting their travel desire

These macro shifts need close attention and will continue to affect travel decisions and levers – across all stages of the funnel – among our ACs globally

Ongoing monitoring of the impact of each will ensure we don't lose momentum from our predicted gains



New macro shifts affect the priority of what ACs will search for in a long haul holiday



SO: Macro shifts have, we believe, resulted in a flip of required messaging to accelerate our ACs through the funnel. Our ACs are now more discerning and cautious

SHIFT! Urgency brewing for 'bucket list' destinations, of which New Zealand is one of many

'Life lessons' from the pandemic is accelerating intention to seek 'bucket list' destinations:

- Heightened feeling that life is uncertain. Feel like they need to 'make the most of it' by packing in as much as possible
- That seeing the world raises a better next generation. Especially for teens, to experience a contrast to the hardships of the last few years
- High levels of exhaustion due to long work hours and WFH blurring work/life balance, so a desire to separate themselves from that

'Escaping normal life' has taken on greater meaning. More about:

- Life changing moments – that challenges me in new ways
- Unique and different experiences – that makes up for lost time
- Lasting memories – to continue the experience when I return

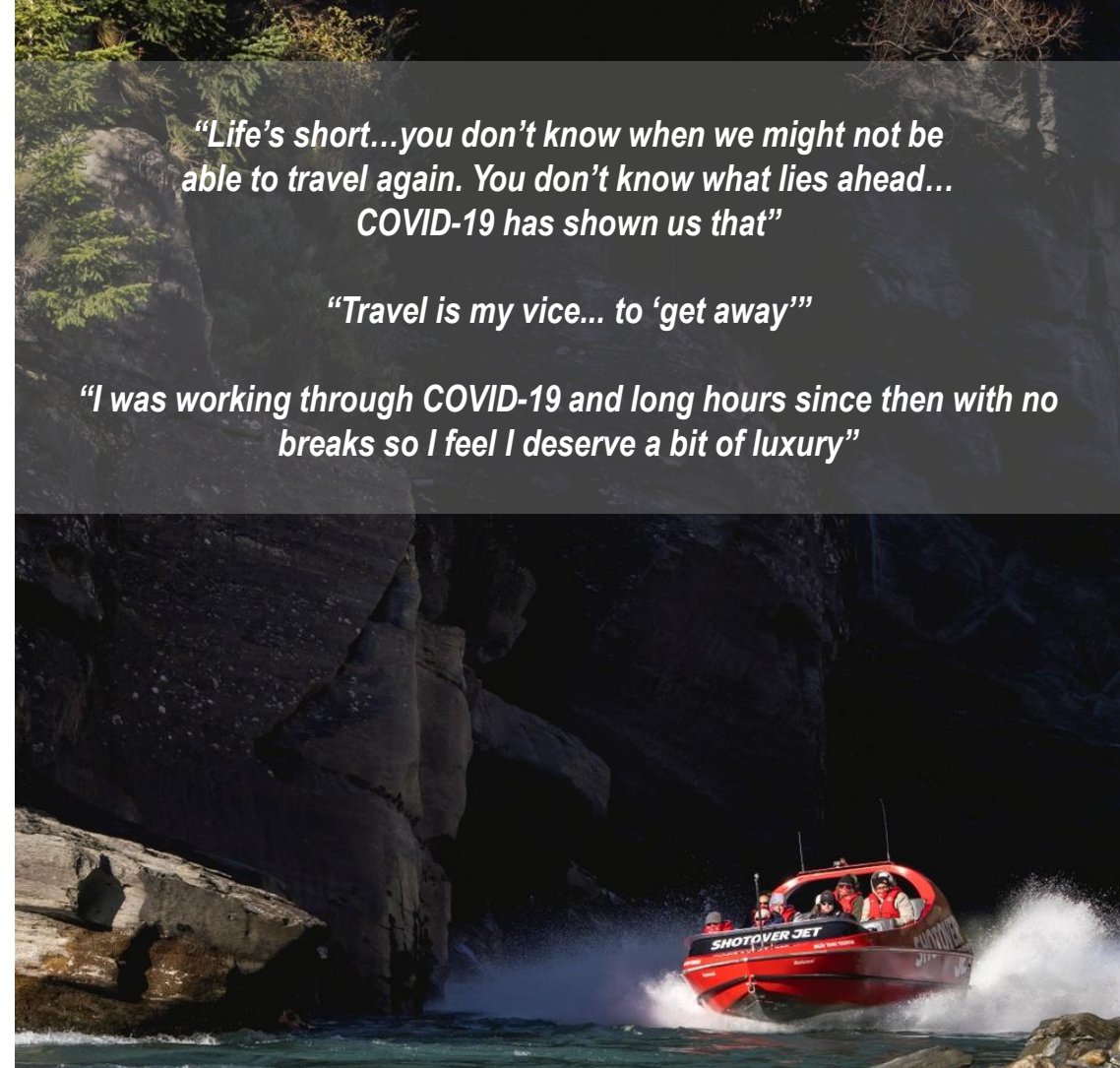
WITH, for some:

- Degree of indulgence – to reward me for my time in lockdown

"Life's short...you don't know when we might not be able to travel again. You don't know what lies ahead... COVID-19 has shown us that"

"Travel is my vice... to 'get away'"

"I was working through COVID-19 and long hours since then with no breaks so I feel I deserve a bit of luxury"



SO: Important to capture 'bucket list' cues in marketing initiatives and messaging

SHIFT! 'Unique experiences' *in nature* seem more important than ever

ACs have told us...

- They've felt cooped up
- They want a slower pace and less people (especially for city ACs)
- A holiday in nature will be good for mental and physical health

BUT they don't just want any nature, it needs to be:

- Bucket list worthy – to increase memories
- Breath-taking – to recharge the soul
- Immersive – to increase enjoyment
- Able to appeal to everyone on their trip – diversity of experiences offered
- Near a city – for contrast, balance and wider appeal

"We've been locked down for 3 years. I want to feel a spirit of adventure and build my confidence"

"India is crowded and chaotic... I definitely don't want a crowded place"



SO: As the world is getting its collective breath back, we need to be seen as THE destination to offer bucket list experiences to help with recharging the body, mind and soul

SHIFT! A stronger desire to feel connected to people and culture

ACs have told us...

- Many wish to share their first long haul bucket list holiday since COVID-19 with friends, family or children
- Many claimed the people in their country had changed since COVID-19, becoming more impatient and unpredictable, and less tolerant of others
- They are seeking to immerse themselves in new cultures. Countries that can offer that, appealed



More interested...

- Feeling *welcomed* to create a feeling of deep connection
- Cultural empathy – not staged performances
- ‘Living like a local’ experiences

“I like the thought of getting to know the locals. Having a chat and sharing some food with them”

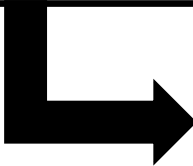


SO: Offer them the opportunity to authentically experience another way of life

SHIFT! 'Safety' has expanded and has grown in importance

ACs have three key concerns for their safety

- Crime and civil unrest - Remains a key concern among all: knowing that you can walk around at night and that you and your belongings will be safe
- Hospitals and healthcare - Worry about getting sick while they are away. Especially for those countries that have most recently opened their borders
- Discrimination and racism - How open do they believe the country is to people of different beliefs and ethnicities. Showing diversity and /or biculturalism in advertising will go along way to reassure here

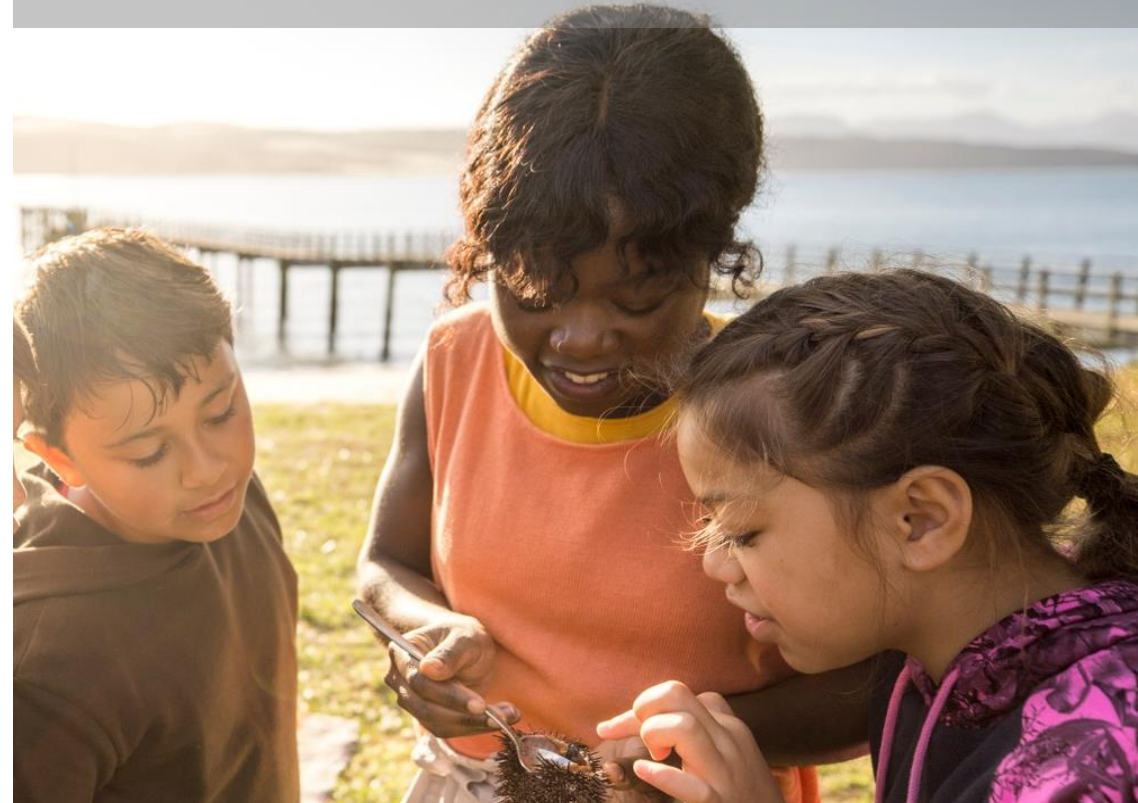


The new understanding of 'safety' is becoming more about being open, progressive and modern

- Not seeing negative press coverage keeps us in mind
- Knowing they will be looked after if they get sick matters
- Knowing we are inclusive puts us ahead of others

"In Europe I felt they didn't really like Japanese people"

"During COVID-19 I heard of some Asian bashing"



SO: Reassure travellers of New Zealand's safe, welcoming and inclusive credentials

SHIFT! Life is described as more expensive, and is impacting travel plans

Many ACs are facing increasing financial barriers e.g., loss of income after COVID-19, new priorities or 'dreams' (mortgages and/or children), rising flight costs, and cost of living

This has meant...

- Delays to travel timeline while saving
- Longer, more extensive planning process
- Bucket list destinations moving up/down depending on deals
- A heightened desire to get 'value' from the trip and make it 'worth it'

AND an increased emphasis on

The Functional – *“There is lots to do when I get there, easy travel around when I’m there, I can do it in ‘one trip’, I can fly there direct, agreeable weather so I can get the most out of my trip”*

The Emotional – *“I will be blown away as soon as I get there. I come home fulfilled, I’ll be left with lasting memories, I’ll feel inspired and recharged”*



“The \$ to YEN makes it much harder to travel now. We have to save so much more. Even the air tickets are expensive, so we have to go in the off season”

SO: We need to ensure we address these questions as we move them through the funnel

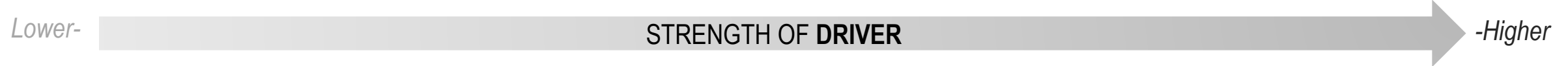


PART 2: **How does New Zealand fare against these shifts?**

Understanding our opportunities and challenges

OPPORTUNITIES:

It's the combination of drivers that put us on their dream list




Ease

- A country that is seen as easy to get around, where you can drive and experience diversity in proximity
- We are still seen as a self-drive destination, which also raises a barrier for those less comfortable
- A country they can explore and discover experiences that take them beyond the well trodden spots

SO: Self drive still offers us a unique advantage vis-à-vis other destinations


Welcoming

- They reminded us, our people are our best ambassadors – consistently described as open and friendly
- Stories of being welcomed by strangers builds a perception of authenticity of experience
- But being closed through COVID-19 has been felt and an absence of interactions with our people

SO: Maintaining our social licence is key to increasing this driver


Safe

- Our response to the CHC Terror attack and COVID-19 has reinforced that we are good people that care
- ACs described us as 'tucked away' and free of the political crossfires other big nations may suffer
- A place where they can switch off and not have to be alert to what might be their reality at home

SO: Double down and show the different ways we represent 'safe'


Landscapes

- LOTR still paying dividends, and strengthened through YouTube, Blogs and travel shows through lockdown
- Epic, lush, pure and fresh - they had a strong mental imprint of what they believe our nature will be
- And seen as emotionally nourishing, creating sense of refreshed, relaxed and recharged

SO: Landscapes are key to ensuring brand attribution. It's what comes to mind first

CHALLENGES:

Many are perceptions rather than reality



—  **Culture**

- **New awareness of Māori culture and bi-culturalism**, allowing us to be seen as open and progressive
- **Also seen as including art, history and culture** – which they are not sure will be better than their own
- **Being a Western country, we don't deliver the cultural difference** they may experience elsewhere (mainly for Western markets)

SO: A bi-cultural story is unique to New Zealand, and attractive

↓  **Sophisticated**

- **Limited awareness beyond our main cities** creates an imbalance between comfort and adventure
- **'Where will I eat'** is the next question after where will at stay – limited awareness of cuisine or where to go
- **Limited perception of accommodation** on offer while here. Four-star minimum for our ACs

SO: A sense of comfort *in* nature grows relevance

↓  **Distance**

- **New Zealand feels like a long way away**, and if coming the distance you need time to make it worth it
- **Flight costs** have increased the perception of distance and made closer and cheaper more attractive
- **A preference for direct flights** rather than lay overs further limits consideration for some

SO: We can never stop trying to counter distance perceptions

—  **Activities**

- **Limited awareness beyond our nature** - unsure whether we have enough to keep everyone happy
- **This was more top of mind for families** and groups where diversity of activities matters most
- **Almost every AC was reliant on Google** for discovering activities. There's no top of mind itinerary

SO: Our comms need to help ACs plan for when they get here

Looking forward there are clear aspects in our brand story that we need to dial up to be more competitive



SO: In the current market, the start point for shifting consideration needs to be on aligning the functional drivers that are currently slowing ACs journey through the funnel

AND: We need to use those who have visited before as brand New Zealand advocates

Our conversations with ACs support previous findings: **We exceed expectations once they're here!**

We tick many of their high impact boxes across functional to emotional needs:

- Unique, different landscapes and adventure
- Unique, different cultural experiences
- Range of diverse activities
- Easy to travel from and to activities

"I knew New Zealand was beautiful before I went – but it was next level"

There are three key hooks we can use to bring them back:

1. **Guaranteed holiday** – They know we tick their key boxes so there is a high stamp of guarantee attached to our brand
2. **Presence on Facebook** – Many of them have joined New Zealand Travel Facebook groups since coming to keep their memories alive
3. **There's still more to see** – They know that there's still so much to see; many only came for several days, and now want to come back for longer. Coming back to explore the North Island, for instance, was strong motivation to resolve

Although, there is some tension for their next 'bucket list' holiday, whether it should be **new destination OR familiar...**

- *Remind them of our **high approval ratings***
- *Use **Facebook to entice** more in and draw them back*
- *Keep pushing the diverse activities that are **still yet to be uncovered***

SO: An untapped community that love our brand and love telling others about us (via social media and word of mouth)

SO: We need to redefine New Zealand in their minds as a *familiar* destination with lots of *new* diverse opportunities – 'if they seek' – to meet their holiday needs

A group of four hikers is seen from behind, walking along a rocky mountain ridge. They are looking out over a vast landscape that includes a large, bright blue reservoir in the middle ground and a valley with green fields and small settlements below. The sky is clear and blue. The hikers are wearing various outdoor gear, including jackets and hats. The overall scene is one of a scenic hike in a mountainous region.

PART 3:

A closer look at the AC funnel for the future

Building a deeper understanding of their dreaming, planning and booking stages

Travel inspiration and info has become increasingly digital

ACs all talked about:



Exploring and hunting for answers digitally

"I googled what the most safe countries were to travel in"



More sites being used to compare and contrast

"I explore a lot of websites for inspiration as I don't want to miss out on anything"



Voyeuristically scrolling blogs and reels

"I like reading other peoples travel blogs to get ideas"



Crowd sourcing for itineraries and advice

"I go onto other travellers discussion groups and use their itineraries"



Less reliance on mainstream media

"I don't see any travel ads on TV – but I see them on TikTok and Instagram"

SO: Greater confidence to DIY means SEO is key



The decision funnel has changed for 2024

Dreaming

SHIFT! The dreaming stage is now condensed

Our ACs have been 'dreaming' for the last 2-3 years; now they're on the cusp of planning and/or booking. Dreaming has also become more active, with many searching and exploring for inspiration of their next dream holiday

S0: Salience of messaging is vital as is a strong call to action in all assets to help push ACs through the funnel now

Planning

SHIFT! Planning is more considered

Most are thinking: how can I get the most out of my trip? Spontaneity was rare

S0: Promotion of www.newzealand.com and other New Zealand travel blogs will lift engagement and certainty of choice

Booking

SHIFT! The booking stage is not always at the end

Booking flights takes precedence. Some are booking before planning other parts of the trip if a good deal arises. Others are making use of pre-Pandemic bookings

S0: We need a strong digital footprint with aspirational messaging to help counter cost deals



Our conversations revealed a set of New Zealand images that had universal appeal across mindsets and markets

Dreaming

GLOBAL MOODBOARD:



Planning

What do I want to see:

Remind me of your breath-taking 'postcard' landscapes that I can easily and fully immerse myself in and will offer me an escape from my ordinary

How do I want to see it:

Show me how easy it is to get around in ways that are different to my norm (biking, campervan, driving)

Why do I need to go:

Because there is a range of activities and experiences that will allow me to recharge and reconnect

Booking

We also found dreaming was activated slightly differently by who we were talking to

Dreaming

Planning

Booking



Experienced Connectors



Travel occasions:

- Older couples
- Families with older parents and/or young children



Vibrant Adventurers

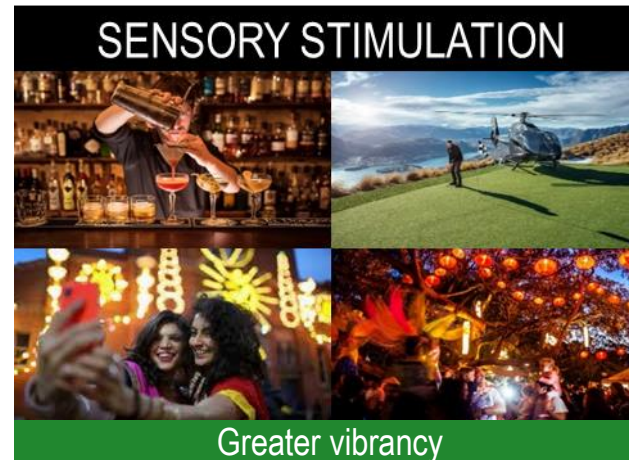


Travel occasions:

- Younger, with friends
- Those with younger teens and/or children



Fun Loving Trail Blazers



Travel occasions:

- Younger couples
- Those with older teens

SO: By market, mindset and life-stage, we can stretch from our core positioning to extend relevance and appeal

The planning stage has stepped up a notch, especially for New Zealand, but we're currently not seen to be overly active in this space

Dreaming

The uncertainty that COVID-19 has brought means that **planning is a requirement** for the majority now
Even our more spontaneous travellers have to research more than they did previously before jetting off

Planning



Checking COVID-19 rules overseas, visa requirements, costs and logistics of flights, accommodation availability have all become necessities



In contrast, many activities are usually not pre-booked (unless they sell out) due to the potential for change (weather, COVID-19 restrictions, and so on). They don't want to be restricted to a tight schedule

Booking



Travel agents can play a key role in ensuring any unexpected changes are taken care of, though many ACs feel more confident post-Covid to search for and book their own flights and activities

SO: The more we can assist, the greater the opportunity to convert ACs

Our digital presence in the planning stage is crucial

Dreaming

Planning

Booking

Journey range: 3 months to 12 months out

THE TIMING: When should I go?

For some this will be about working in with work and/or family commitments

For others it is all about the weather: seeking seasons often opposite to their own

SO: Don't show extremes

THE INSPIRATION: What should I do when there?

Some of our ACs browse travel blogs, YouTube and Facebook (e.g., Explore New Zealand and New Zealand Travel Tips)

Friends are also often tapped for info

This can affect arrival and departure destination within country

SO: Be present on social

THE PLAN: How can I make the most of my time?

Greater influx of itineraries being developed. Many search online/borrow others and/or feedback and advice is sought from web groups

NB: Variation on level of detail created depends on mindset

This can affect mode of transport

SO: Direct to itineraries

THE SAFETY NET: Where should I stay (and where will I eat)?

Knowing there will be 4-Star plus accommodation was a minimum for our ACs

Few preferring Air BnB

The foodies search for restaurants/eating places that will excite/indulge, such as looking at ratings and testimonials

SO: Must-dos are critical

The more we help our ACs plan, the easier it is for them to book

Dreaming

It's an exciting time but can also be overwhelming with the amount of information at finger-tips:

Key searches include:

- 🔍 What activities to do in X / Top 10 things to do in X
- 🔍 What is X famous for?
- 🔍 When is the best time to go to X
- 🔍 How can I get around? How easy is it to get around?
- 🔍 Other travellers' itineraries

Google searches are used but sometimes parked in many cases as often dominated by 'promotion' sites, which many prefer to ignore, versus country-specific generic information

Instead, many rely on advice from other travellers (via blogs, forums etc.), as well as friends and friends, who have been/lived in New Zealand to help them plan

Planning

ROADBLOCK! More research = more effort = more delays

- When shown our site (www.newzealand.com), the appeal and interest was high: at both a functional and emotional level
- When some were asked to search for the site directly, it was rarely at #1 position on the page
- 'New Zealand travel tips', and other pages on Facebook, are commonly used closer to departure

Booking



SO: There's a missed opportunity for us. Potential to intervene further through digital planning process

Booking is the hardest stage for us to drive, but there are some behaviours that can be tapped into

Dreaming

Planning

Booking

1

The search

Most of our ACs are enjoying the DIY buying experience post-COVID-19: *"It's part of the fun"*

Scepticism increased around the true value of travel agents and package deals (especially. from own country); except for India

SO: Potential to Inspire ACs through newzealand.com and use as a gateway to direct traffic

2

The flights

People prefer to avoid stop overs due to risk of baggage lost, hassle and preference to reduce time on plane. Some are willing to pay extra for direct flights

Most on high alert to find a flight deal 3-6 months out: Web Scanner and Email alerts via specific airlines had high mention

SO: Lift our presence in the cities that have direct flights to New Zealand

3

The accommodation

Mixed views on booking accommodation and activities in advance. Patterns tend to correlate with mindset

Most book at least their first few nights accommodation. Some book majority of stay due to FOMO. Many book their transport in advance – especially if self-drive

SO: Ensure our accommodation content is easy to use, and work with accommodation aggregators




4

The activities

Activities are generally the last to be booked. Again, some may book the odd one – especially if it's their reason for visiting a destination – but most prefer to wait: *"in case things change"*

SO: Let's think of ways we can nudge them digitally to keep excitement alive

Macro trends may be creating *potential* tweaks within our priority mindsets, but their core drivers remain the same

	Dreaming	Planning	Booking
 <p>Vibrant Adventurers: Are ready now and keen to beat the 'traffic'</p>	<ul style="list-style-type: none"> About: adrenalin, trying new outdoor challenges and activities, motorbikes, campervans, white water rafting, diving etc. Feeling: bold and daring, sense of achievement, rush, feeling free BUT in a welcoming place 	<ul style="list-style-type: none"> More than previously - <i>"I've never done itineraries but now I'd do a tentative one"</i> <ul style="list-style-type: none"> Travelling top priority May plan 3-6 months 	<ul style="list-style-type: none"> Less likely to book flights spontaneously now - will think about the best deal/right destination Unlikely to book activities until get to New Zealand; will scope out best activities and then book
 <p>Experienced Connectors: Are ready to move from short to long haul</p>	<ul style="list-style-type: none"> About: clean air, beauty, serenity, admiring the scenery, spending time with self and/or loved ones, sitting on a beach, self drive, campervans, small towns, overnight camping Feeling: relaxed, recharged and reconnected 	<ul style="list-style-type: none"> High - Will spend time working out drive distances and stops. Likely to do a detailed itinerary Saving important; juggling other priorities <ul style="list-style-type: none"> May plan for 6-12 months 	<ul style="list-style-type: none"> Unlikely to do package deals but may use a travel agent. The experience is often centred around the drive
 <p>Fun Loving Trial Blazers: Are passionate about indulging self and family</p>	<ul style="list-style-type: none"> About: hedonism, fun, city and outdoors, rich diverse experiences, luxury accommodation and transport Feeling: invigorated, rewarded, pampered 	<ul style="list-style-type: none"> Some - Likely to peruse other peoples itineraries <ul style="list-style-type: none"> May plan for 3-6 months 	<ul style="list-style-type: none"> Constantly scanning for flights. Good deals will flip dream decision on head <ul style="list-style-type: none"> Likely to spend high money on accommodation, cars and food and some 'wow' activities

SO: Messaging and needs delivery require tight alignment to priority mindsets

A scenic beach at sunset. The sky is a mix of blue and orange, with the sun low on the horizon. The beach is sandy and has many footprints leading away from the viewer. On the left, there is a dark, dense forest. The overall mood is peaceful and contemplative.

PART 4: **Global recommendations**

Overarching insights for improving appeal and conversion rates

We're in a strong position to win share from competitor destinations, and our marketing can help drive further demand



We've got a great positioning; let's focus on its foundations

Our beautiful landscapes, distance away from political unrest, and friendly culture gives us an advantage



We've got great assets; let's make them work harder

Our latest TVC was loved by many, and our website evoked high interest by all those shown it

But we need to provide greater convictions that a holiday here is 'worth it'

1 Continue to finetune positioning going forward to fit with macro trends:

- Trends need to be continually assessed to check we're on point
- Travel readiness also important to monitor increase receptiveness of messages
- To appeal to a wider number of ACs a layer of indulgence and/or urban experience should also come through

2 Weave in more functional and social cues into current brand assets:

- For functional: indicate locations in all scenes/activities shown
- For social: expand cultural shots to highlight unity and connectedness
- Utilise website to reassure re safety: including number of nationalities living in New Zealand, low crime rates etc.

3 Increase presence of our brand and messaging to encourage ground swell of interest:

- Tap into our ACs interest in social media platforms – including New Zealand travel blogs – to explore travel
- Mainstream media rarely mentioned, but outdoor (electronic) billboards and bus/train posters were
- Celebrities and movies were often cited as ways to get a deeper idea about New Zealand

But we need to increase the number of ACs that see it and remember it

4 Increase salience of our messaging by working on the cut through of our end message:

- '100% Pure' is powerful and recognised, but as other NZ brands use similar sentiment (e.g honey, butter), it no longer just relates to tourism
- 'If You Seek' captures hearts, but in isolation, can leave the mind wondering 'why/how'
- Increase memorability of outtake and ensure it resonates with NZ travel

In current times, as a long haul and expensive destination, we need to give our ACs a helping hand through the funnel. Three potential ways:

1. We could: Capitalise on *If You Seek* to encourage exploring

Our tagline provides a perfect segue into ACs moving down the funnel BUT they need more help with what we're asking of them. A stronger call to action is needed on all advertising to explore

- We should be more active in directing them to our website and/or other New Zealand forums/blogs to explore
- We should think of other creative ways of bringing 'If You Seek' to life to prompt searching

2. We could: Help them with their research and planning

ACs are planning more; but it can be overwhelming. Google searches often land them in 'company' sites trying to sell a deal. It's easy for the task to be parked

- Our website is the perfect tool to help them plan more easily (but awareness needs lifting as does our search ranking)
- Tailored itineraries from our site and/or New Zealand travel forums are especially appealing; we need to tell our ACs they're there

3. We could: Provide more hooks to purchase 'now'

New Zealand is considered a destination that requires maximum planning to ensure maximum satisfaction and no regrets. However, planning is often stalled or even parked

- Flight deals represent the most effective trigger; we need to help communicate these and remind of the value they will get from a holiday in New Zealand
- Promoting specific events off the back of our core messaging will give ACs a greater sense of 'more for their buck' and reason to purchase now (especially for Australian ACs)

PART 5:

Market and region deep dives

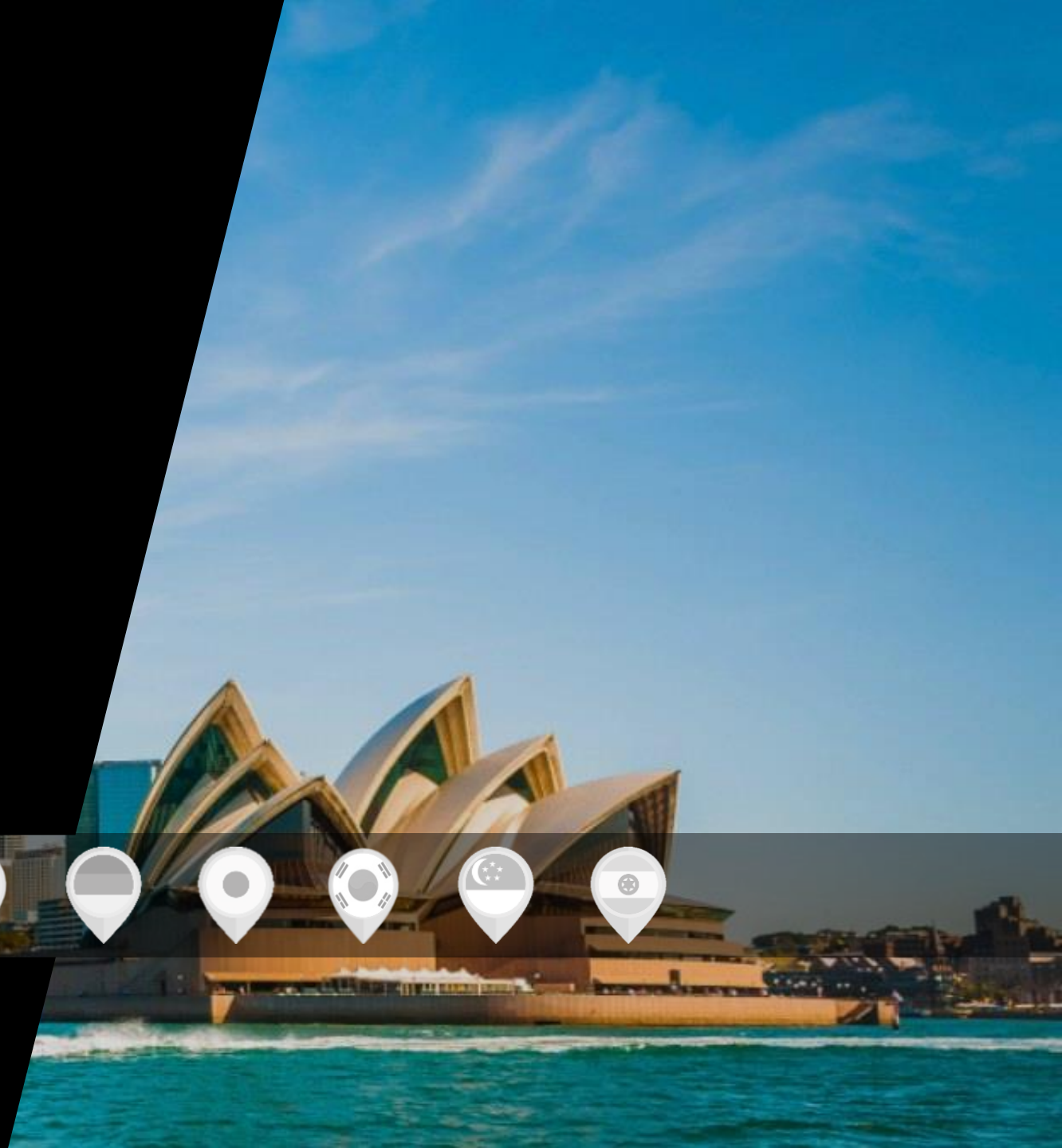
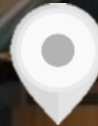
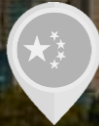
Macro trends

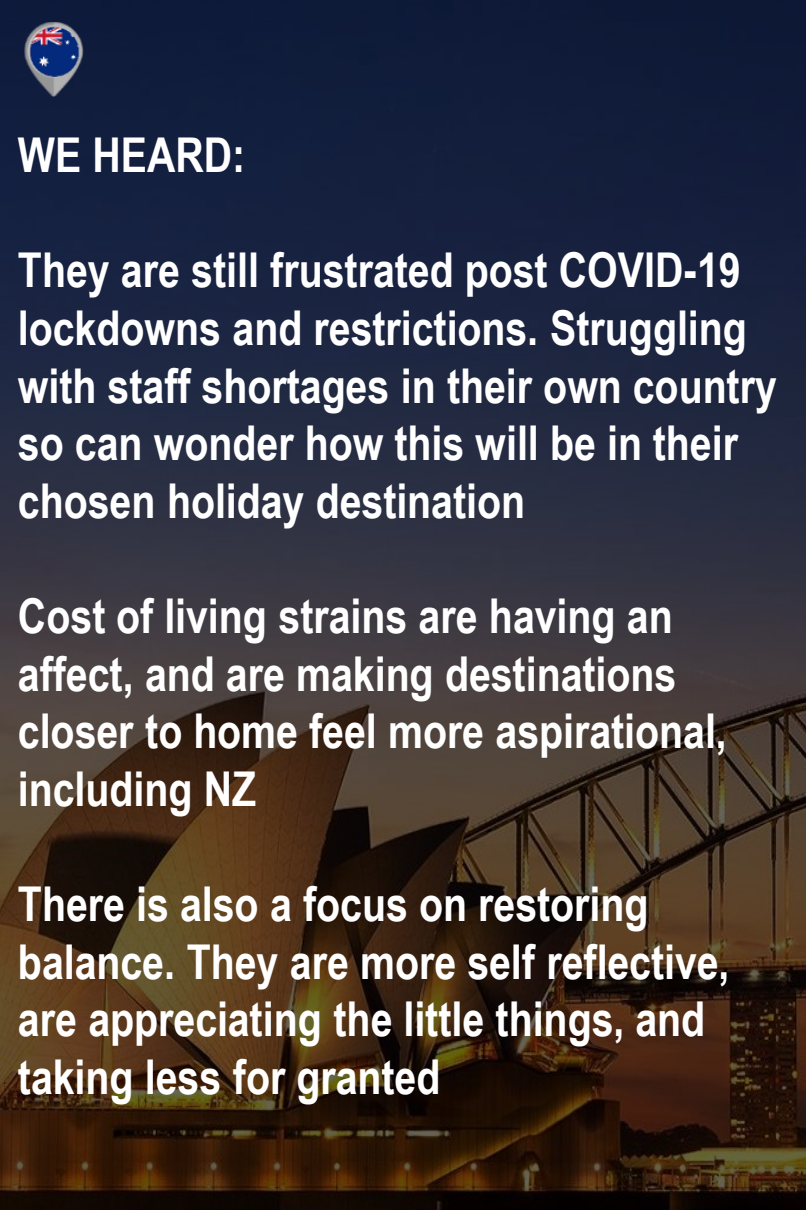
Booking funnel

Consideration drivers



Australia





WE HEARD:

They are still frustrated post COVID-19 lockdowns and restrictions. Struggling with staff shortages in their own country so can wonder how this will be in their chosen holiday destination

Cost of living strains are having an affect, and are making destinations closer to home feel more aspirational, including NZ

There is also a focus on restoring balance. They are more self reflective, are appreciating the little things, and taking less for granted

<p>TRAVEL RESTRICTIONS</p> <p>Perceived as 'frustratingly late to open'. While they are eager to travel we still picked up on nervousness about border certainty, and going too far from home</p> <p><i>"It was hard not to be able to travel during lockdown as we couldn't even go interstate"</i></p>	<p>CULTURAL DIVIDE</p> <p>Racism and discrimination are not top travel concern. But we picked up on dividedness and tolerance as concerns in their own country</p> <p><i>"Australians don't seem as easy going as we used to be; we're more oppressed and socially awkward"</i></p>
<p>2023</p> <p>Impact: Moderate Impact: Low</p>	
<p>GEOPOLITICAL TENSION</p> <p>They're used to feeling safe. Therefore, political unrest in Europe and Asia is causing them to rethink their 'ideal' destinations</p> <p><i>"Definitely with everything happening out there at the moment, it can make New Zealand feel pretty good"</i></p>	<p>COST OF LIVING</p> <p>Financial insecurity is on the rise, along with cost of flights, especially domestic. Australians are saving for longer and thinking harder before they book</p> <p><i>"We used to be able to fly to Thailand for \$600... now it's \$1200"</i></p>



SO: A market that is feeling restricted on its options. There is a play here for us on our relative ease as well as being competitively priced compared to domestic flights



Connecting *in* nature excites our Australian ACs

Australia specific imagery board:



What are the key hooks for New Zealand?

- Diversity of activities that they can experience together in nature – the range of ways they can experience New Zealand matters
- Seeing the ways they can relax together – with borders open, thinking again about birthdays, honeymoons and anniversaries
- Postcard perfect landscapes and sights that make the trip more special – they already can imagine how beautiful we are
- Weather and climate – need to assure them they will be warm. This is especially important when competing against Bali and Fiji
- Difference – see what they can't experience in Australia. Culture is important here, but so too is nature

PLANNING INSIGHTS

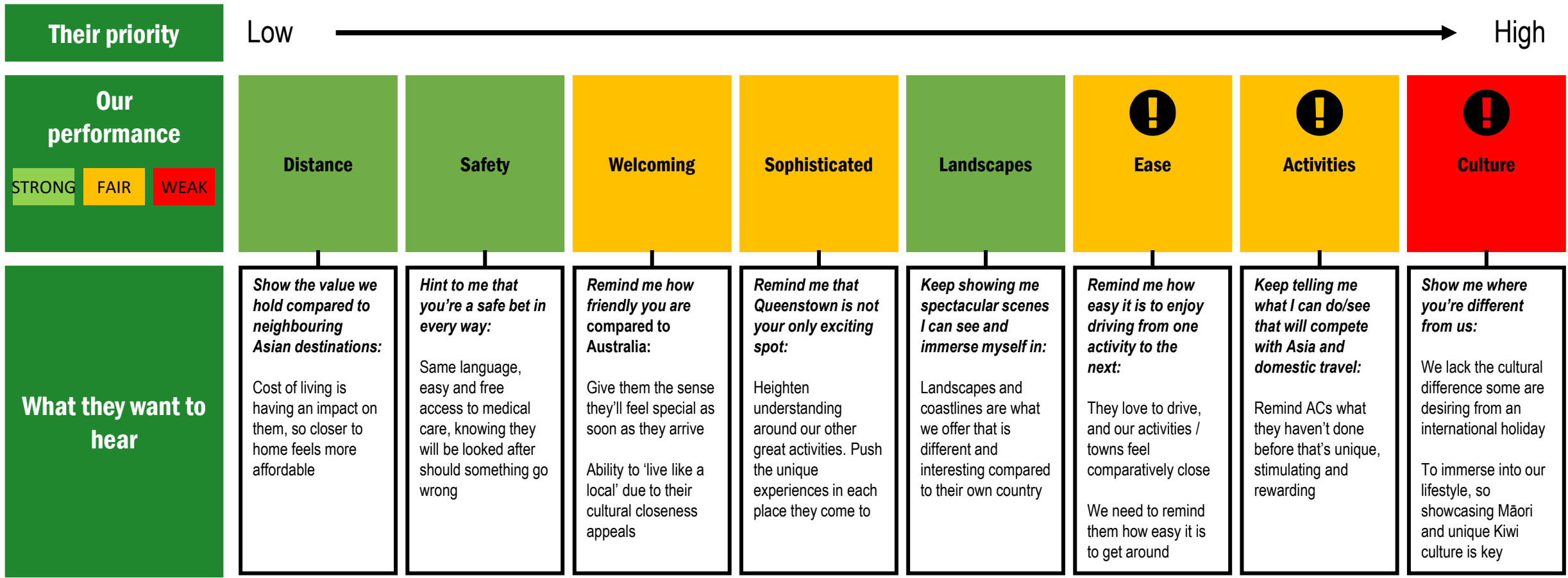
They don't need to plan the details as they don't have as much to lose – they think of us as 'just over the ditch'. This makes us an easy and 'risk free' choice compared to other destinations

BOOKING INSIGHTS

Flight costs are having a significant affect, especially domestic. Some are now searching less than they used to. While we offer a similar pricing point to domestic we are deemed more desirable



Australian ACs need convincing that they'll get more value from a holiday here than a domestic holiday or short haul trip to Asia



Macro trends

Booking funnel

Consideration drivers

SO: We need to focus on the diversity of experiences within close proximity to help drive value – like a 'mini-Europe' where what they will see and experience is vastly different from one day to the next

"I want to escape the norm and have different experiences, food and see different places"

"I prefer mild to hot weather, so I'll always look to see what the season is there"

"I need peace. The world is so hectic. I want to be restored and just slow down... BUT it still has to be unique"

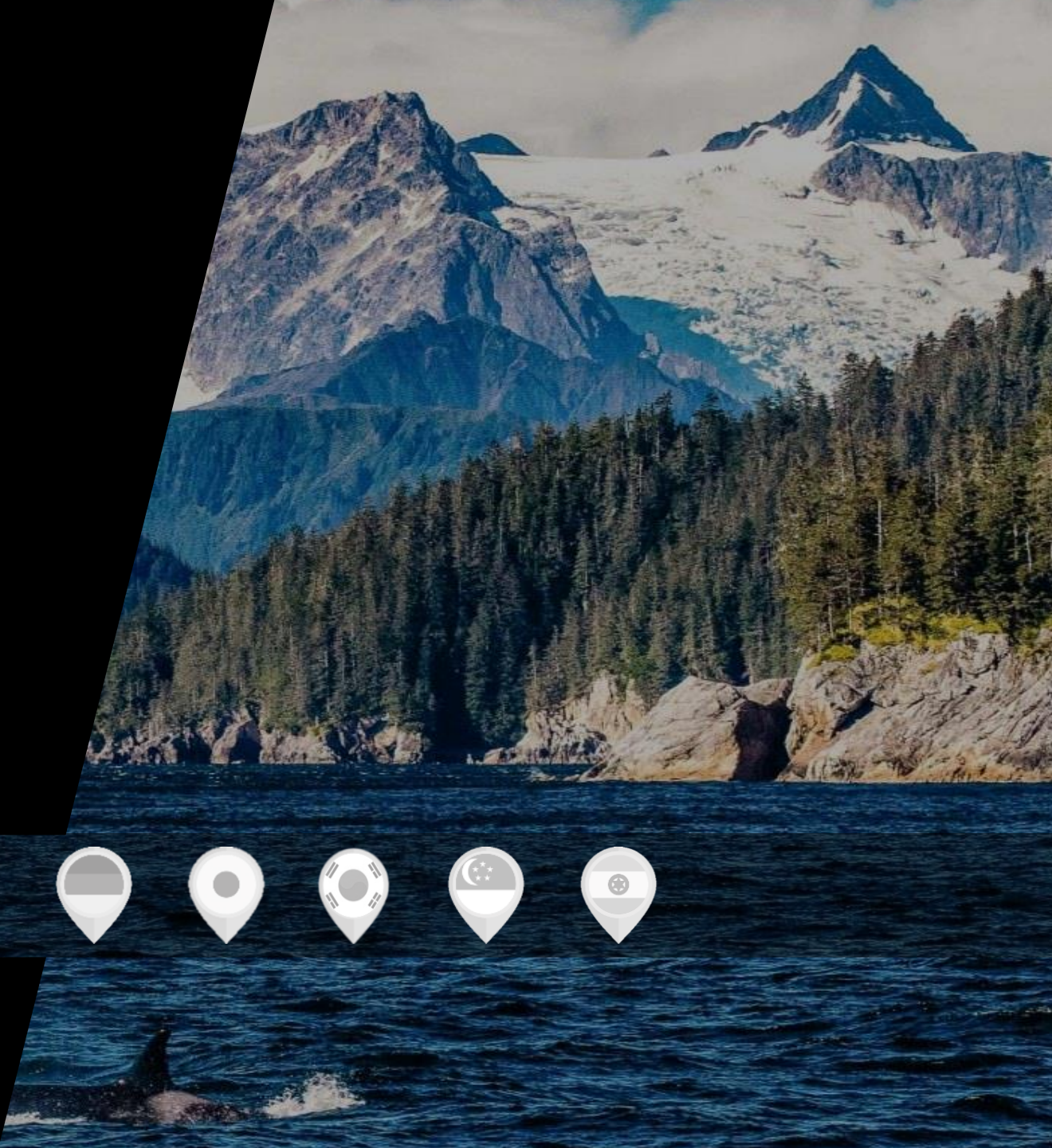
"I want to live life as I would if I lived there"

"I want to feel welcomed, not like I'm just another pesky tourist"

"New Zealanders are just like us. Places like Thailand and Bali have cultures so different to ours. Long distance just feels more unique"

"I want ease when I'm travelling, like no long layovers, no long, boring car rides"

US and Canada





WE HEARD:

They're keen to get away but there's less urgency compared to other markets

Life in each country is considered fairly good, along with good local and short haul options for travel so the bucket list holiday can be easily put off

However, they are conscious of the constant bubbling of unrest in the US and elsewhere, and are curious to explore what life and political landscapes are like in other countries; increasing knowledge appears to resonate with these markets

<p>TRAVEL RESTRICTIONS</p> <p>COVID-19 restrictions were light, so they could explore local terrain, have fresh air and therefore, didn't feel too isolated, nor restricted.</p> <p><i>"We enjoyed lockdown in weird ways, but now I'm probably keener to leave the grind behind"</i></p>	<p>CULTURAL DIVIDE</p> <p>There are some concerns around how they may be perceived as 'tourists' overseas, however this isn't enough to put them off travelling</p> <p>No language issues</p> <p><i>"I want to feel welcomed... I know some people might look at us like we're just another annoying tourist"</i></p>
<p>2023</p>	
<p>GEOPOLITICAL TENSION</p> <p>Some political tension creating a desire to explore internationally. They're becoming more conscious of homelessness, racism, crime, and general unrest. Interested in escaping from this momentarily to reset</p> <p><i>"I love my country, but I like to get away to give me a fresh perspective, and sometimes even a new appreciation of my own country"</i></p>	<p>COST OF LIVING</p> <p>There were lower concerns around the increasing cost of living compared to other markets. They had a more reward-based mindset – the reward being travel after being in lockdown for too long</p> <p><i>"I'll still budget, but I'm just ready to get out and explore, and I don't want to compromise on that"</i></p>



SO: A region that is eager to travel but need a juicy hook to create a greater sense of urgency for booking a longer ('life-changing') haul vs short getaway (including domestic)



Experiencing nature *up close* is how both markets dream of exploring in our country

US and Canada specific imagery board:



What are the key hooks for New Zealand?

- Deeper and more immersive unique experiences – literally being able to imagine themselves walking up a ridge gets them dreaming
- Balancing activeness with relaxation excites – hot pools offer a level of comfort that they don't envision us having
- New cultural experiences appeal – desire to interact and see a different way of life, especially one that appears safe and 'chilled'
- Self-driving interests – they like the notion of exploring from a car and that it's easy to make their way around our country

PLANNING INSIGHTS

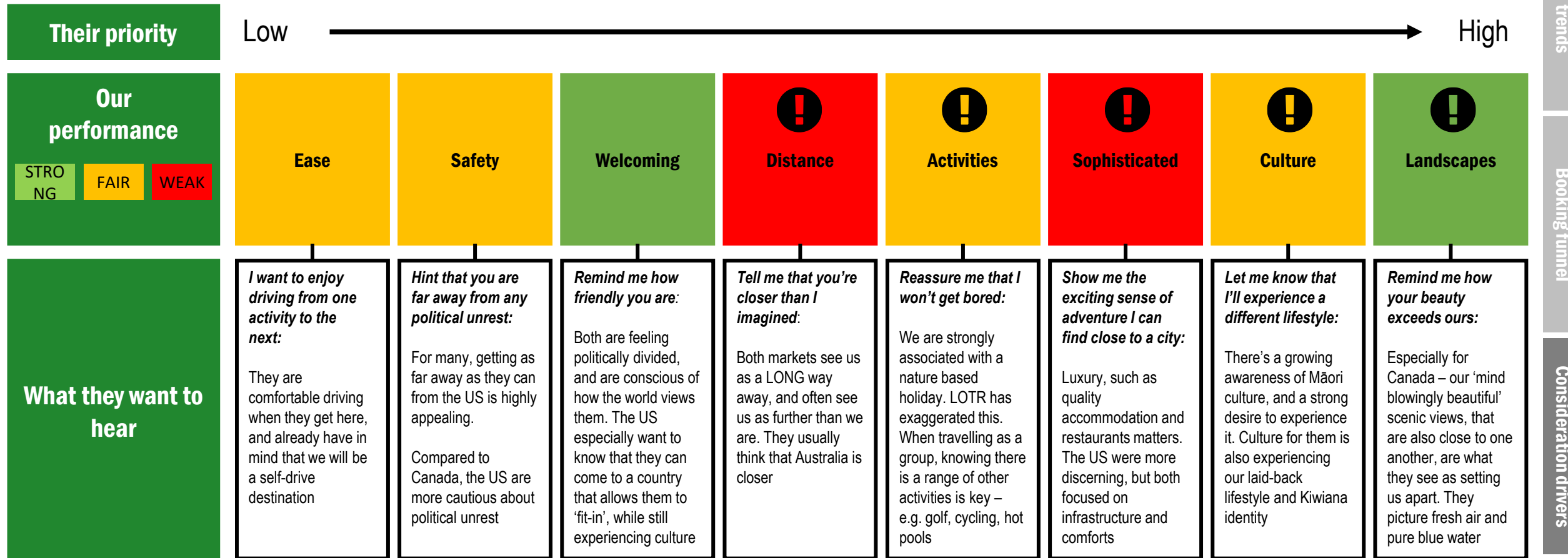
Greater reliance on word of mouth to get recommendations on the must-see places, and plan accordingly around these; having some flexibility with plan interests: *"I like to be able to deviate if I choose to"*.

BOOKING INSIGHTS

Some tapping into travel agents to guide decisions and booking, particularly for flights, but they're usually able to do much of the booking online by themselves. Package deals prompt some interest



US and Canadians desire holidays that offer the best of both worlds - on the lookout for destinations that fuse both city and nature



SO: Two markets that enjoy learning and exploring new things. They want to 'do', not just 'see'. BUT need to be pushed through the funnel, especially as they have good domestic options on their doorstep. Deals are key



“Lots of my friends who have been talk about New Zealand, like “oh, you HAVE to go””

“A good holiday to me is one that gives me both city-life and beautiful landscapes”

“I’ve been to a luau in Hawaii. I feel like New Zealand would have indigenous shows like those. I think they’re similar”

“I want luxury and status, as well as adventure”

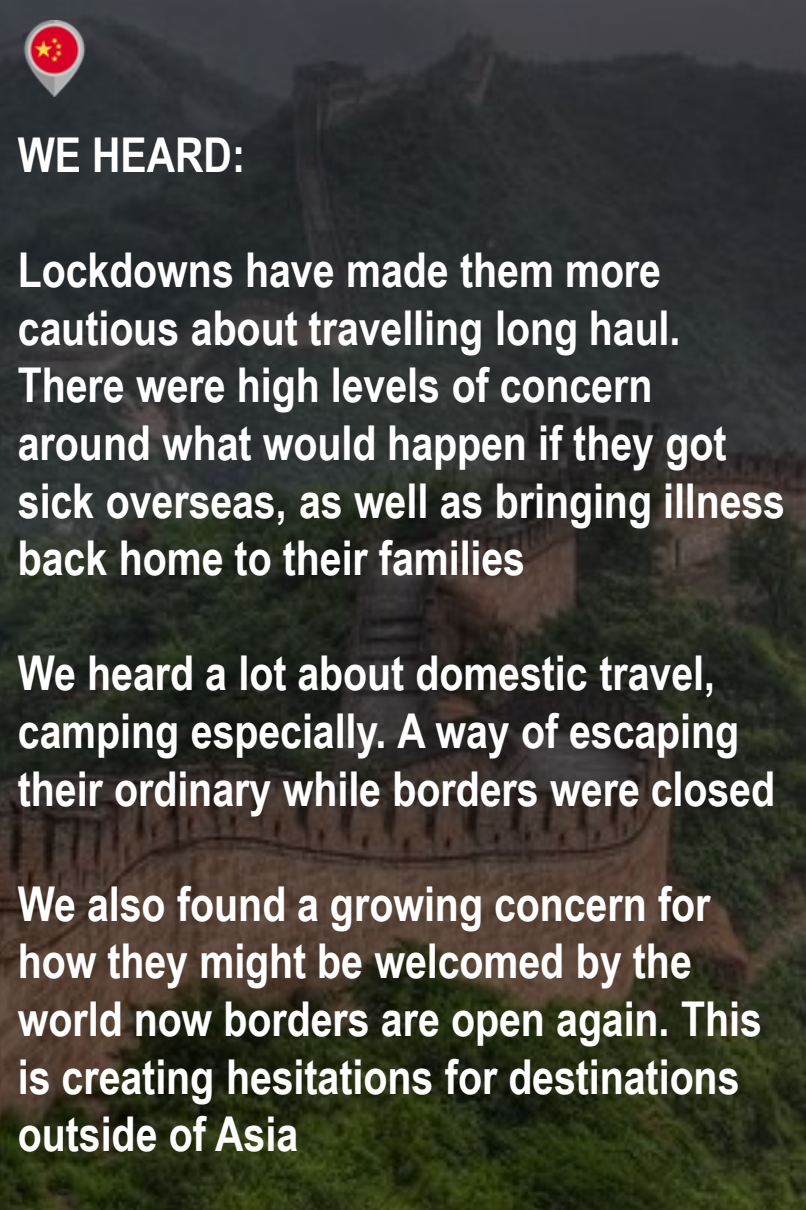
“It’s like an 18hour flight from LA to New Zealand, isn’t it? That’s a long time”

“There’s lots to see in the States, so I like travelling domestically to experience that”

“I love biking or trekking through the wilderness. Just spending time in nature”

China





WE HEARD:

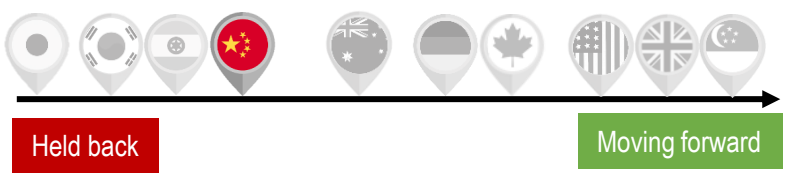
Lockdowns have made them more cautious about travelling long haul. There were high levels of concern around what would happen if they got sick overseas, as well as bringing illness back home to their families

We heard a lot about domestic travel, camping especially. A way of escaping their ordinary while borders were closed

We also found a growing concern for how they might be welcomed by the world now borders are open again. This is creating hesitations for destinations outside of Asia

<p>TRAVEL RESTRICTIONS</p> <p>Border and travel restrictions, enforced lockdowns and mask wearing. Keen to explore again, but are concerned for health. Short haul seemed to have stronger appeal for now</p> <p><i>“I’m unsure what places are open for Chinese travellers. I’d have to research that”</i></p>	<p>CULTURAL DIVIDE</p> <p>Higher concerns around acceptance overseas post-COVID-19. Many worried that they will be victimised and discriminated against in foreign countries. Safety is now at the forefront of their minds when choosing a holiday destination. High likelihood of checking online for ‘safe’ countries to visit</p>
<p>2023</p>	
<p>GEOPOLITICAL TENSION</p> <p>There appears to be only mild concern around any political unrest. We found Chinese ACs won’t let political unrest stop them from travelling, with one even saying Russia is on their consideration list</p>	<p>COST OF LIVING</p> <p>ACs seem less effected by economic stressors. Cut backs on their spending have been prompted by COVID-19 restrictions, not economic pressures. They’re aware of companies going bankrupt, but so far, this has had little impact on them</p> <p><i>“I guess I’m going out to eat less... but that’s because of lockdowns”</i></p>

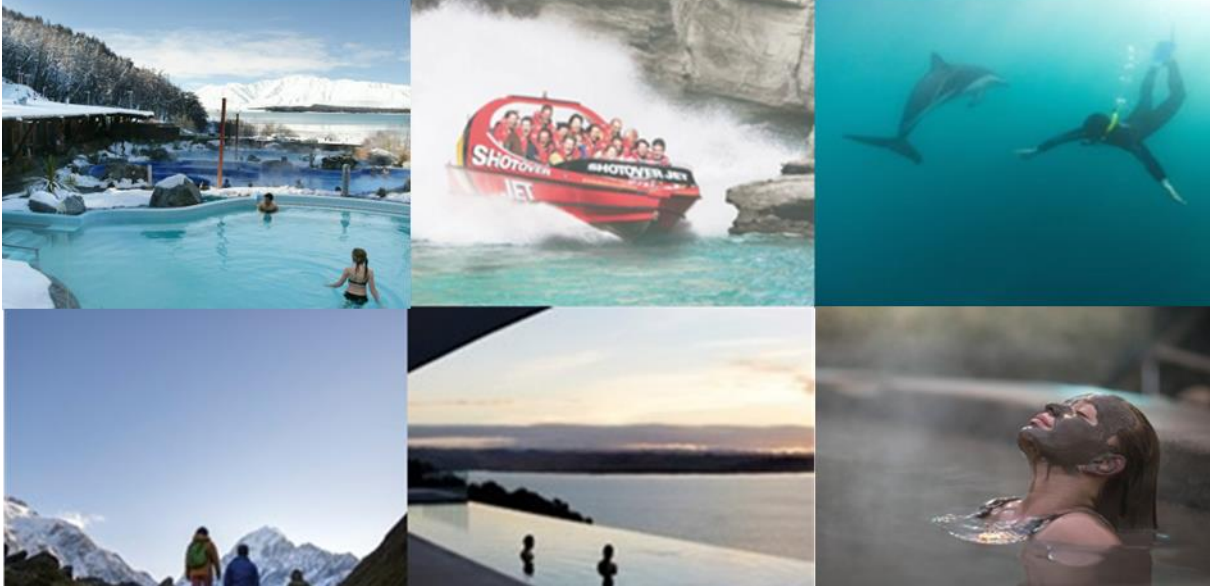
Impact: High	Impact: High
Impact: Moderate	Impact: Low



SO: Our care led response through COVID-19 and a country where they will be welcomed is an important lead message

An immersive experience in nature that feels safe, that can be viewed from afar, is ideal for our Chinese ACs

China specific imagery board:



What are the key hooks for New Zealand?

- The sense of adventure while feeling safe – they are less inclined to picture themselves on top of a mountain, but they do like the idea of an overnight camp and BBQ
- Participating in activities that will build confidence and sense of self-worth and freedom
- Seeing lots of 'Insta-worthy' moments – for example, glaciers are on many of their bucket lists – and in a short time frame (vs Australia)
- Experiencing a simpler life and pace – showing the opposite of their ordinary, which is busy and stressed
- The quality of our accommodation and infrastructure – they want reassurance that they're coming to modern country with enough infrastructure to get around easily

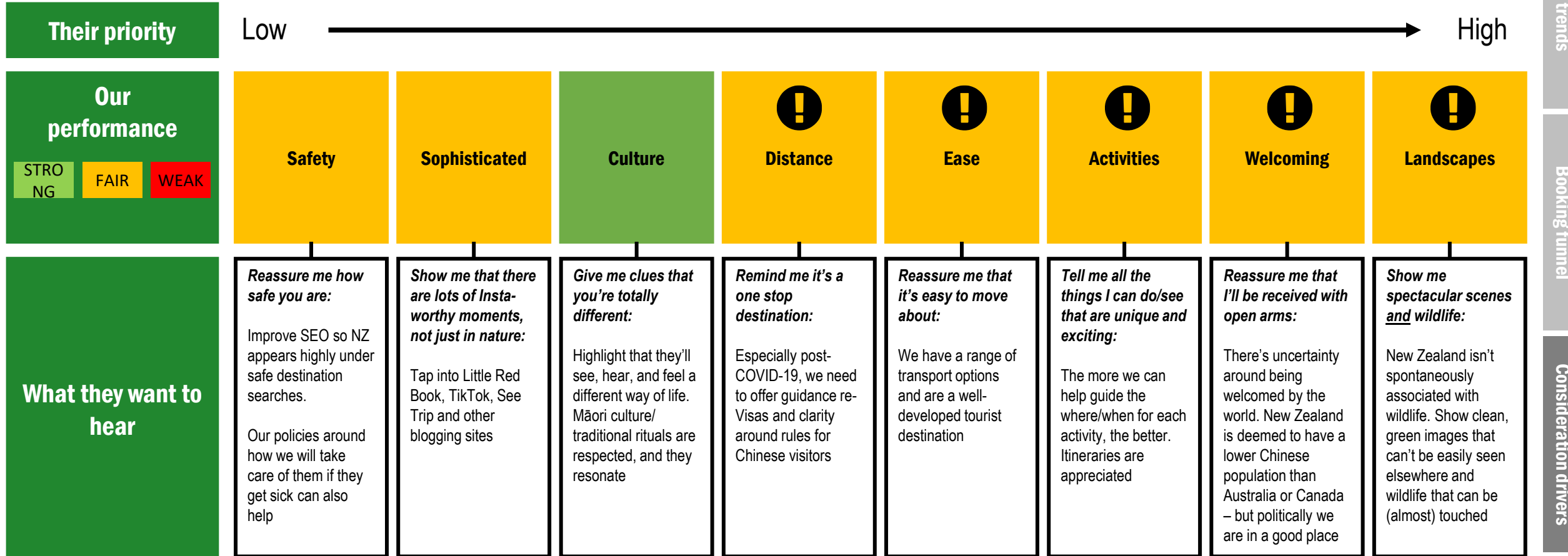
PLANNING INSIGHTS

High reliance on online forums, advice from others (both word of mouth and bloggers) and other social media sites to inspire and guide (notable platforms for this market include TikTok and Little Red Book)

BOOKING INSIGHTS

Interest in booking direct; conscious of good exchange rate and therefore getting value for money in New Zealand compared to other competitor markets

China ACs need a little more prompting to shift from short to long haul travel but we're in a good space to win appeal



SO: Promoting a feeling of 'safe freedom' will help to enhance the appeal for exploring New Zealand's Insta-worthy, unique playground

"For inspiration, I use TikTok and Little Red Book. I see what other people are doing on holiday and it helps me make my decisions"

I want to see and do stuff that is different: penguins going back to their cave, volcanos, glaciers, parachuting"

"You need a visa to visit most places now. Lots of countries are asking for Chinese people to have a visa"

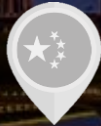
"I want a challenge. I want to feel like I was out of my comfort zone and achieved something"

"I want to see how they [New Zealanders] live their everyday, normal life"

"I need to see images of the scenery. Show me the beauty New Zealand has to offer me"

"Australia is so big with massive lands... you'd have to spend a few months there. I like the idea of New Zealand for its climate and size and original sights"

UK and Germany





WE HEARD:

Travel is a rite-of-passage for Germany and the UK are eager to escape from ‘cold and grey winter days’

BUT price sensitivity is creeping up, slowing travel booking and prompting deeper planning

Concerns around rising hostilities and unrest are causing deeper thinking about the safer countries to visit and the appropriate timing to travel. Germans in particular are feeling affected by war and costs of living and would love to escape, even momentarily, to give themselves a fresh perspective

<p>TRAVEL RESTRICTIONS</p> <p>For two cultures that love to travel, COVID-19 restrictions created some resentment.</p> <p><i>“We find any excuse to leave UK. We often spend landmark birthdays overseas... and the further away, the more memorable” –</i></p>	<p>CULTURAL DIVIDE</p> <p>Overall, this was of little concern in both markets, especially compared to our Asian markets. However, there were expressions of concern around racial hostility from German and British ACs originating from different ethnic backgrounds i.e., of Asian, or Arabic descent</p>
<p>GEOPOLITICAL TENSION</p> <p>Concern over the rise in unrest in the EU and Ukraine. Some are avoiding certain EU countries – e.g. Greece, France and Eastern Europe. Germans are worried about the impact of lockdown and war on their children's outlook.</p> <p><i>“I want my children to see that life isn’t always like this</i></p>	<p>COST OF LIVING</p> <p>Cost of living is steadily increasing – especially with interest rates and food – which is having an impact on daily choices and indulgences. Travel has had to be deprioritised for some. Cost of flights have steadily increased, yet still deemed affordable within the EU (just!).</p> <p>In Germany specifically, economic pressures have risen significantly due to the war in Ukraine</p>

2023

Impact: Moderate	Impact: Low
Impact: Moderate	Impact: Moderate

Macro trends

Booking funnel

Consideration drivers



SO: A market that is finding longer haul travel more enticing and appealing, but that the cost of living is starting to encroach on plans

Different messaging is required for UK and Germany ACs, but, wanting warm weather to explore nature in was consistent across both

UK and Germany specific imagery board:



What are the key hooks for New Zealand?

- A window into what life will be like when they get here, and a lifestyle different to their own – easy-going, barefoot, carefree
- Welcoming different cultures and being safe from discrimination and political unrest – especially for people of colour and/or Asian origin
- The food – “what will we eat” was a common question. Offering different takes on foods they’re familiar with allows us to pique their interest
- Being shown nature – especially for the UK, who were less adventurous than Germany
- Desire to experience raw beauty with a level of isolation – Mainly for Germany who have a strong familiarity with our nature

PLANNING INSIGHTS

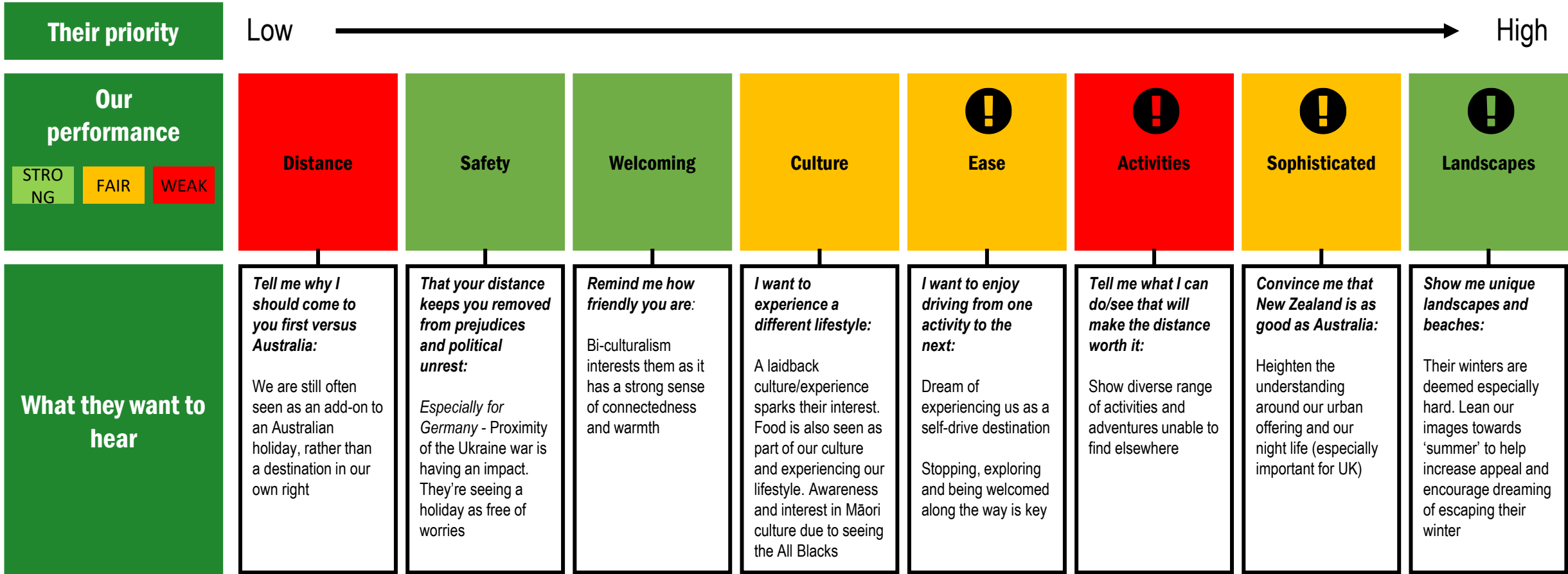
These markets are extensive planners, and this stage feels like less of a chore than other markets perceive it. Especially for the UK, word of mouth comes into play in the planning stage

BOOKING INSIGHTS

They hunt for bargains on flights but won't substitute quality for price with such a long-distance trip, especially for accommodation. They search for self-catering accommodation to save money during their trip



For UK and Germany, it's harder to address 'Distance', so we need to dial up that 'it's worth it'



Macro trends

Booking funnel

Consideration drivers

SO: Continually promoting the vast number of unique activities and experiences, ideally within a multi-dimensional context, will help to keep New Zealand firmly in their vision as an ideal bucket list holiday



"I love travelling long distance, but it is expensive..."

"Australia seems a lot more built up than New Zealand, which has it's pros and cons"

"The nature you have in New Zealand doesn't compare to the UK – the beautiful beaches, the greenery...it's very beautiful and very relaxing"

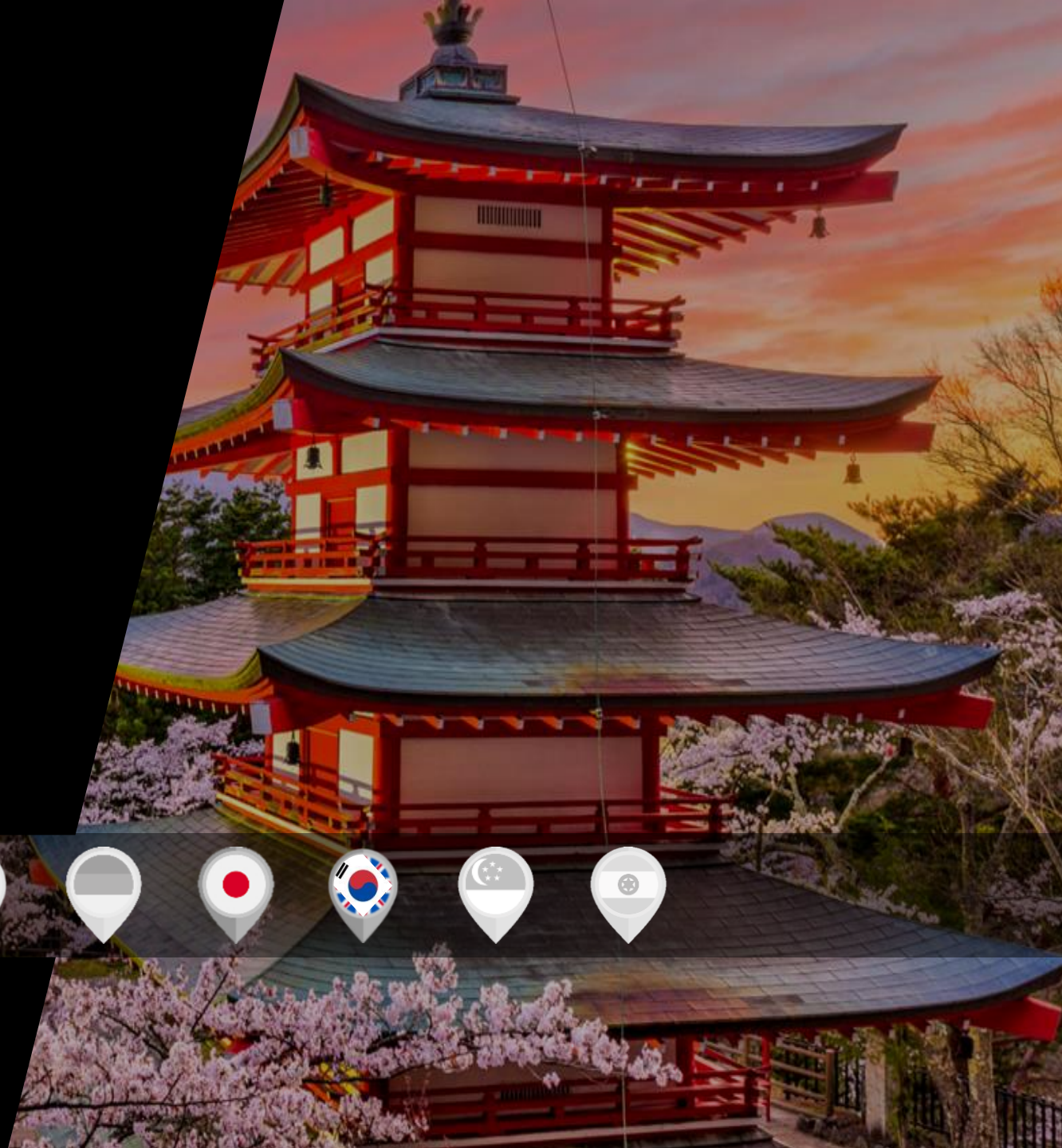
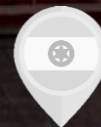
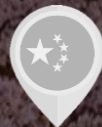
"It's a long way, so it makes sense to do Australia and New Zealand at the same time"

"The culture in New Zealand is very interesting, and I would like to learn more about it"

"I'm really keen on being part of the New Zealand people and culture. I think of welcoming people, stress-free, nice, they won't lock their front doors – it will all be chill and super relaxing"

"I've been to Australia before then popped over to New Zealand. I was surprised that it was better than I thought. It wasn't just a small village of hobbits, so I'm really keen to go back again and explore it properly"

Japan and South Korea





WE HEARD:

Both markets to be the most delayed in their long haul travel intentions. They talked about not having done a long, or even short trip, in years

Domestic travel has increased in popularity post-COVID-19, especially in Japan. They see domestic and/or short haul travel in Asia as a safer bet

Their strong cultural value of avoiding uncertainty appears to be magnifying this delay, especially with concerns surrounding discrimination

<p>TRAVEL RESTRICTIONS</p> <p>There's little mention of COVID-19's impact, especially as they're used to rules (including wearing masks). Furthermore, there's more opportunity and interest to travel within their own country. Similar to New Zealand, Japan has idyllic landscapes on their doorstep and is considered safe</p>	<p>CULTURAL DIVIDE</p> <p>This is a high concern. They're acutely aware of global perceptions of Chinese people since COVID-19, and are worried about the roll on effect to all Asians. Particularly concerned about going to US and the EU.</p> <p><i>"The hate crime against Asians is big in some parts of the world... it's scary"</i></p>
<p>Impact: Moderate Impact: High</p> <p>2023</p> <p>Impact: Moderate Impact: High</p>	
<p>GEOPOLITICAL TENSION</p> <p>Some worry with China's relationship with Russia and tension with US. They prefer to avoid China for these reasons</p> <p><i>"I wouldn't travel anywhere near China at the moment"</i></p>	<p>COST OF LIVING</p> <p>A greater concern for Japanese ACs as the weaker YEN is having a significant impact on their ability to travel comfortably. They would rather delay and save further</p> <p>The cost of living in S. Korea is better, but they're still faced with time-off restrictions, which makes planning and long distance travel harder</p>

Macro trends
Booking funnel
Consideration drivers



SO: Markets that need a stronger push to consider long haul travel over short haul (especially for Japan)

Viewing nature *from comfort* was consistent for both our Japanese and S. Korean ACs

Japan and S. Korea specific imagery board:



What are the key hooks for New Zealand?

- Our unique natural environment - described as tranquil and expansive, and offering things to see that will be hard pressed to find elsewhere
- Māori culture sparks curiosity - there was a lower level of awareness, but the interest relates to the pride they have in their own history
- Our size and low density - we're perceived as less intimidating, easier to get around, and free from political unrest
- We're Southern Hemisphere - this adds a degree of uniqueness – seeing the same but opposite to what they have
- Weather matters - they are wanting to escape their hot summer as well as their cold winter. They see our weather as relatively mild

PLANNING INSIGHTS

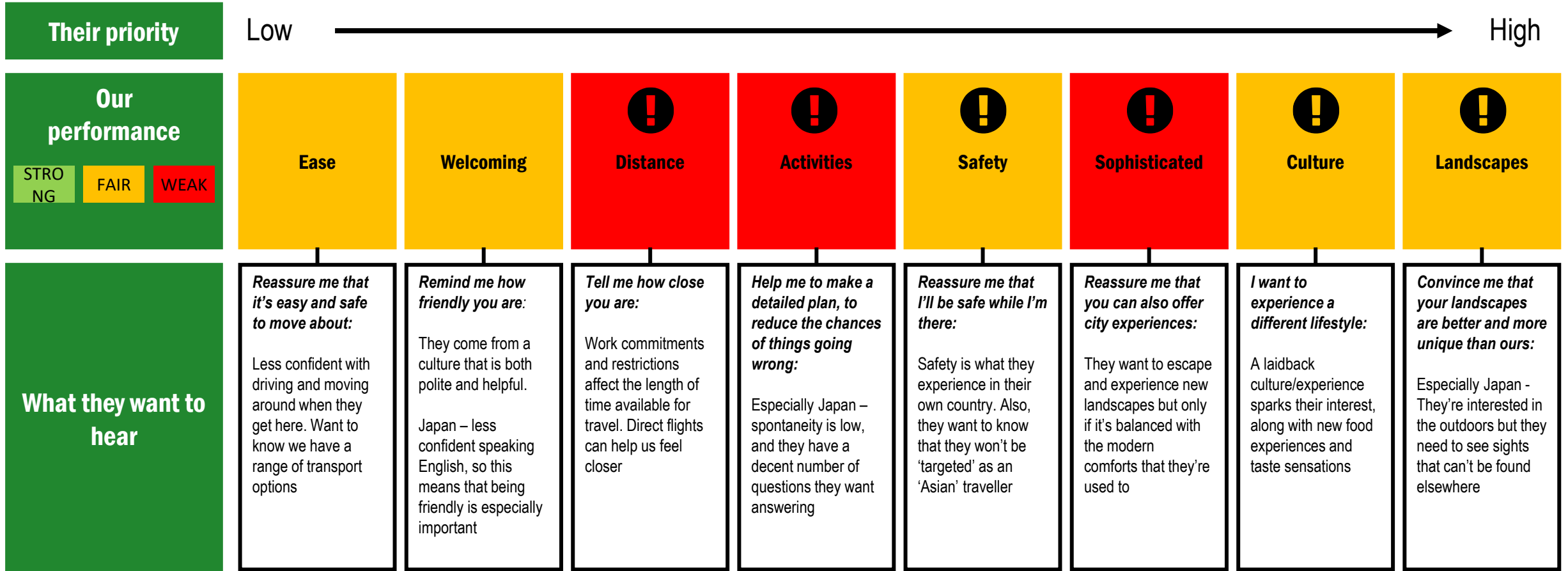
They are the most risk adverse of our markets, so a high degree of planning and detail is undertaken, including checking which country is the safest to visit

BOOKING INSIGHTS

They don't have a lot of time off, so they like to maximise key public holidays. However, the exchange rate and cost of flights is having a considerable impact on delayed bookings



For Japan and S. Korea there's a greater number of drivers to meet to solidify New Zealand as their key choice



Macro trends

Booking funnel

Consideration drivers

SO: Being seen as the safest and most Insta-worthy destination will help to drive interest. BUT given their instinct to avoid uncertainty, we need to be more active in meeting their functional needs – think safety

“Safety and public order is important, especially since I’m travelling with kids and don’t want to be caught in the middle of anything”

“New Zealand is similar to Canada with the beautiful nature, clean air and good living and infrastructure but its warmer and maybe more charming as its smaller”

“I want to relax on holiday, but I also want to walk around and explore nature”

“I want to see scenery that is ‘wow’, that I can’t see anywhere else”

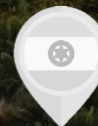
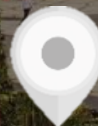
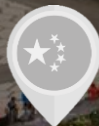
“With international travel, I want to feel free and liberated from work and everyday life”

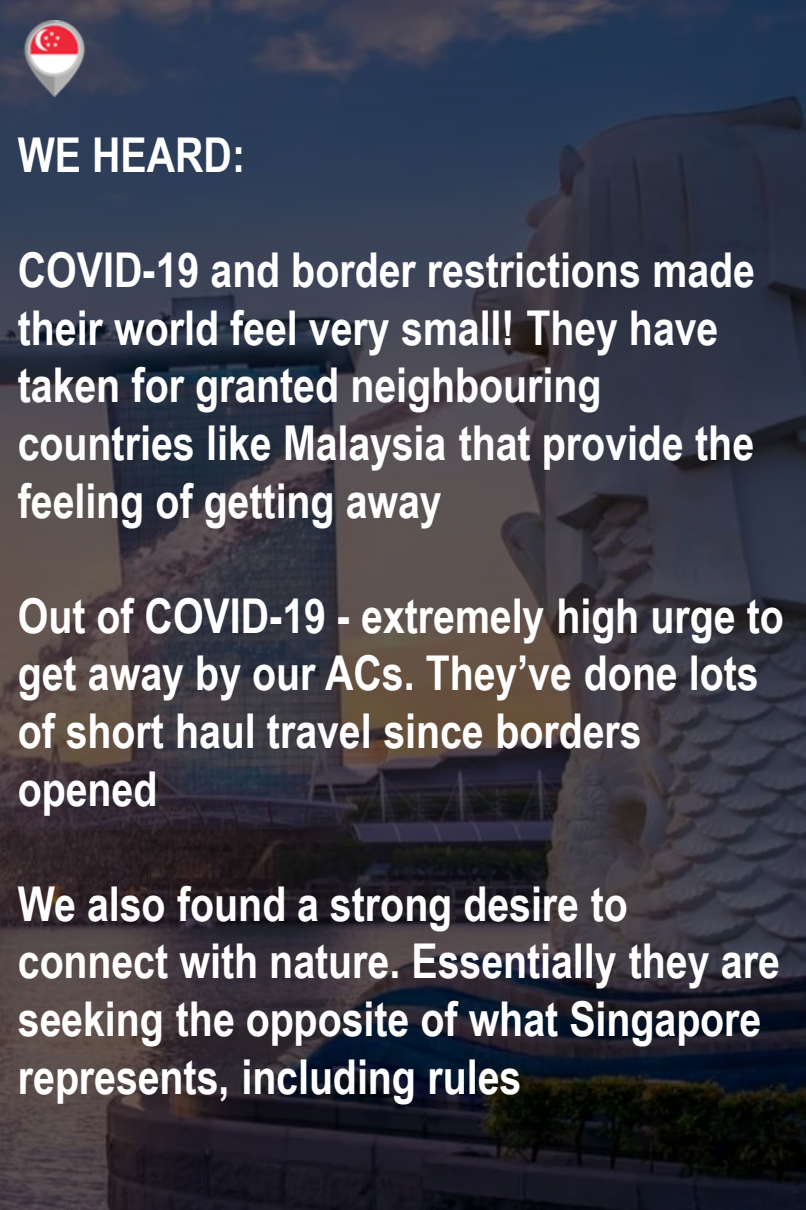
“Because New Zealand is so far away, you’d have to go for at least 10 days, which is hard, especially for me because my mum is older and I need to look after her”

“I want to get away to somewhere with different cultures to my own... I want to get away from my life and reality”



Singapore





WE HEARD:

COVID-19 and border restrictions made their world feel very small! They have taken for granted neighbouring countries like Malaysia that provide the feeling of getting away

Out of COVID-19 - extremely high urge to get away by our ACs. They've done lots of short haul travel since borders opened

We also found a strong desire to connect with nature. Essentially they are seeking the opposite of what Singapore represents, including rules

<p>TRAVEL RESTRICTIONS</p> <p>It was hard during COVID-19: environmental limitations and weaknesses were pronounced (too hot, too concrete, nowhere domestically to travel to, lots of traffic and congestion, lots of rules, hectic and fast)</p> <p><i>"We couldn't even drive to Malaysia"</i></p>	<p>CULTURAL DIVIDE</p> <p>No apparent concerns around how other cultures view them. No language issues when travelling abroad either. They expect to feel safe</p>
<p>GEOPOLITICAL TENSION</p> <p>They report that their government is working hard to create unity and togetherness and were less sensitive to geopolitical tensions in the region than some of the other countries – e.g. Hong Kong still seen as a desirable destination</p>	<p>COST OF LIVING</p> <p>Lower concern about price of living compared to other markets. But there is some concern about losing their job if they travel for too long</p> <p>Cost of air travel is positive departing from Singapore: <i>"we have more airlines so cost of flights are competitive"</i></p>

Impact: High Impact: Low
Impact: Low Impact: Low
2023



Held back

Moving forward

SO: A market that are lined up and already travelling

Our Singaporean ACs want to see and experience a ‘different way of life’ from their own, that they can share with others

Singapore specific imagery board:



What are the key hooks for New Zealand?

- Exploring our lush green landscapes in cooler temperatures, vastly different from their own
- Availability of adventures and indulgences unavailable elsewhere, but experienced within a slower pace of life
- A place to share with families and groups – they are thinking about travel with (older) parents
- Food and beverage – they still want to know we will have sophisticated cities with specialty cuisine
- Guided – they want to get close to our nature but don't always feel confident going at it alone

PLANNING INSIGHTS

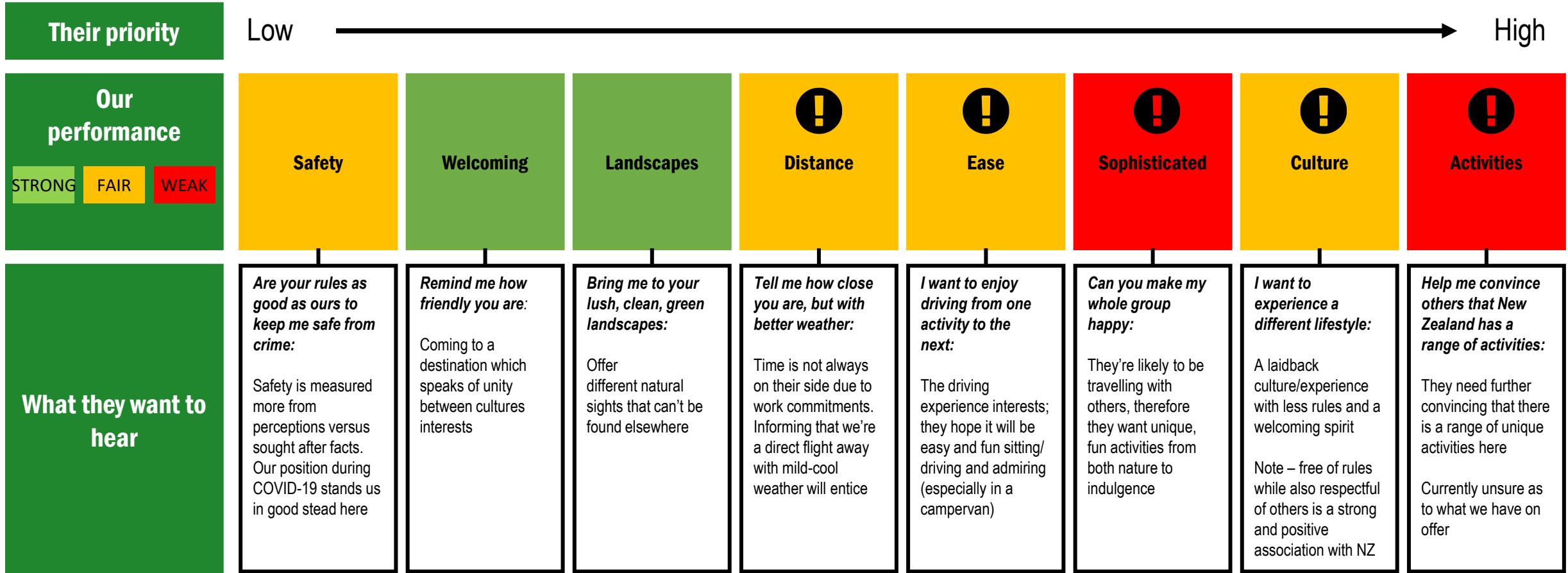
Convincing friends/family is the hard part: Like to check that all their travel group will find it ‘worth it’ with a diverse range of activities in nature and beyond which are easy to get to

BOOKING INSIGHTS

Coordinating diaries takes time. Costs to NZ were rarely mentioned, nor were the costs while here



Singaporean are keen to get out of their 'concrete jungle' and explore the world



Macro trends

Booking funnel

Consideration drivers

SO: We need to dial up the diversity of unique experiences within a culturally inclusive environment to give us the competitive edge



"I travel with a group, so I have to make sure there's something for everyone."

"I don't know how much there is to do there [New Zealand], I haven't researched yet. But I worry that there might not be enough and we could get bored."

"I feel like New Zealand will be expensive, BUT I don't mind if it's for activities I can't do elsewhere."

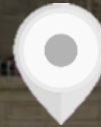
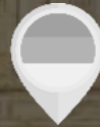
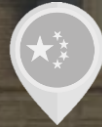
"I want to go to popular countries when I'm with my friends, with lots of exciting things to do."

"It's so hot here all the time... So going somewhere with cooler temperatures is attractive. I want to be comfortable while I'm exploring nature."

"I want to see things that I can't see in Singapore, like high mountains."

"Travelling around New Zealand could be hard as I could lose a whole day if it takes too long."

India





WE HEARD:

Travel was always predominantly about getting away from a stressful lifestyle. Now, the worsening of work-life balance has meant a stronger need for an escape

Desire to rejuvenate and reconnect was especially strong. Also were more likely to be travelling with family so activities that allow them to connect and build memories together mattered more

Some travelling for leisure while also considering us as a place to immigrate to (we're competing with other countries for this, e.g. Canada). VFR also a key driver that affects their value equation

<p>TRAVEL RESTRICTIONS</p> <p>Extended and restrictive lockdowns, a high death toll, and mounting work and mental pressures are all making the relief through travel more sought-after, and more urgent</p> <p><i>"Here there is traffic, pollution, crowd and chaos. I want to the opposite of that when I travel so I can relax"</i></p>	<p>CULTURAL DIVIDE</p> <p>There's an underlying fear of being discriminated against is leading to a sense of restriction and feeling held back due to fear of judgement</p> <p><i>"As an Indian, you have to be on your best behaviour because you are representing your country and sometimes there can be racism"</i></p>	
<p>GEOPOLITICAL TENSION</p> <p>There's less concern around political tensions, but safety and health considerations are having a lingering effect</p> <p><i>"It's not so much around being stranded somewhere, but I am now more conscious of my health and safety. It's important that I have a plan in place in case of another health or natural event"</i></p>	<p>COST OF LIVING</p> <p>Weaker currency necessitating the need to assess the cost versus benefit of a long-haul holiday. Growing economic uncertainty means that financial and familial responsibilities take precedence (especially since average travel age is older)</p> <p><i>"I think more about finances now because as I've grown older I have more responsibilities"</i></p>	

2023

Impact: High	Impact: Moderate
Impact: Moderate	Impact: High



SO: A market that is mentally primed to travel, but held back by the economics of their situation

Imagery of *relaxing in nature* accelerates our Indian ACs through the dreaming stage

India specific imagery board:



What are the key hooks for New Zealand?

- Beautiful, sparsely populated and clean landscapes; the opposite of their everyday reality
- A safe and worry-free environment that offers a sense of rejuvenation, where guests are pampered and treated with respect
- Planned and organised adventure and activities that can excite but where they can also relax
- As a food driven culture, new foods and cuisine that is different to their own interest (assuming they can also still access food that is familiar)

PLANNING INSIGHTS

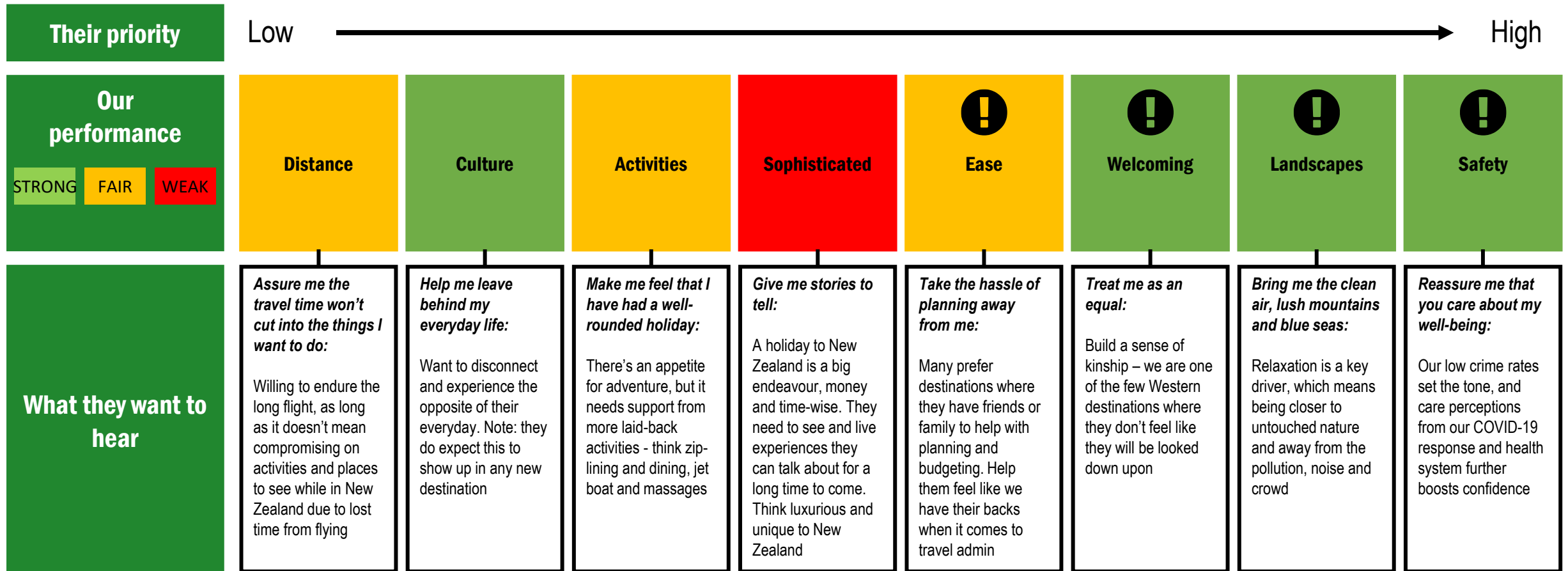
A market which appears to have the most interest in customisable travel packages to eliminate doubt, planning pressures and FOMO; family and friends in NZ are called upon to guide decision making too

BOOKING INSIGHTS

Price and deal was a key driver to moving them through the funnel. Knowing they will be able to get a tourist visa can also move one destination above another



Our brand story does the job of emotionally drawing them in, but we need to dial up aspects that feed into the 'worth it' evaluation



Macro trends

Booking funnel

Consideration drivers

SO: We are hitting the right spot for their top considerations. Now it's a matter of making the logistics of the holiday work by helping to minimise the efforts and maximise the returns



“I like package holidays – it eliminates doubt and I like that somebody is picking me up... I feel safer and I don’t have to think too much. I would do it for the first half of my trip while I gain confidence”

“I don’t want a crowded place as that’s what I have here...I went to Dubai recently and went on their metro but then didn’t step back on it as it was so crowded – it just reminded me of home”

“I’m not much of an adventure person. I just want to see natural beauty and relax and experience their food and way of life. I want to learn about another lifestyle; how they talk, act and behave”

“I saw an independent study recently which showed NZ is one of the safest countries to visit”

“I love the idea of going to a place like NZ where the population density is low and there is beauty all around... I’m keen to try their cuisine”

“That ad sums up what I’m hoping to experience – lake views leading up to mountains, cave diving, swimming with dolphins and hanging with local, indigenous people”

“I love travelling with others as it keeps the memories alive. I was in Goa recently and we were having dinner by the beach and there was a full moon... my friends and I still talk about that”



THIS HAS BEEN A ONE PICTURE DEBRIEF

MARCH 2023

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