



**FORWARD**

OCTOBER 2015

**MBIE**

# China FIT Visitor Market Research Report





# CONTEXT AND PURPOSE

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China is the fastest growing and second largest source market for visitors to New Zealand. Underpinning this trend is a marked recent increase in the volume of Chinese travelling independently to New Zealand<sup>1</sup>, rather than in large guided tour groups.

To help the New Zealand visitor sector respond to current and future developments, realise opportunities and build competitive advantage, the Ministry of Business Innovation and Employment commissioned FORWARD Insight & Strategy to provide the following:

- Market research about the needs, preferences and practices of Chinese Free Independent Travellers (FIT) to New Zealand.
- Analysis of the market research findings and development of related recommendations as to how New Zealand visitor sector operators can apply the findings to realise greater value from the China visitor market and provide quality experiences to Chinese FIT visitors to New Zealand
- The presentation and dissemination of the research findings and recommendations to multiple audiences within the New Zealand visitor sector, through formats that will encourage and assist their application by operators, including in the development of new or adapted products and services.

# INSIGHT OVERVIEW AGENDA



|          |   |    |           |   |     |
|----------|---|----|-----------|---|-----|
| <b>1</b> | <b>IMPORTANCE OF TRAVEL TO CHINESE</b>  | 10 | <b>8</b>  | <b>BUILDING VALUE</b>   | 100 |
| <b>2</b> | <b>WHY NEW ZEALAND</b><br>The unique and compelling New Zealand proposition   | 15 | <b>9</b>  | <b>FOOD AND BEVERAGE</b><br>Understanding the New Zealand Food and Beverage opportunity | 106 |
| <b>3</b> | <b>BRINGING CHINESE VISITORS TO LIFE'</b><br>Understanding differences and who will fit with your business.   | 25 | <b>10</b> | <b>SPECIAL INTEREST</b><br>National themes  | 121 |
| <b>4</b> | <b>SEASONAL DEVELOPMENT</b>   | 43 | <b>11</b> | <b>GOLF OPPORTUNITIES</b><br>and Innovation   | 130 |
| <b>5</b> | <b>REGIONAL DEVELOPMENT</b>   | 52 | <b>12</b> | <b>SOCIAL / CULTURAL OPPORTUNITY</b>  | 154 |
| <b>6</b> | <b>DIGITAL AND SOCIAL MEDIA</b><br>Digital and social media connection  | 67 | <b>13</b> | <b>ACCOMODATION</b>   | 159 |
| <b>7</b> | <b>PRODUCT DEVELOPMENT</b><br>KEY ENABLERS FOR OPTIMISING THE CHINESE<br>- Their travel style – A group as an ethos, not a number<br>- LANGUAGE<br>- Deals<br>- Digital Freedom | 84 | <b>14</b> | <b>SECTOR ENABLERS</b>  | 165 |

# APPENDICES



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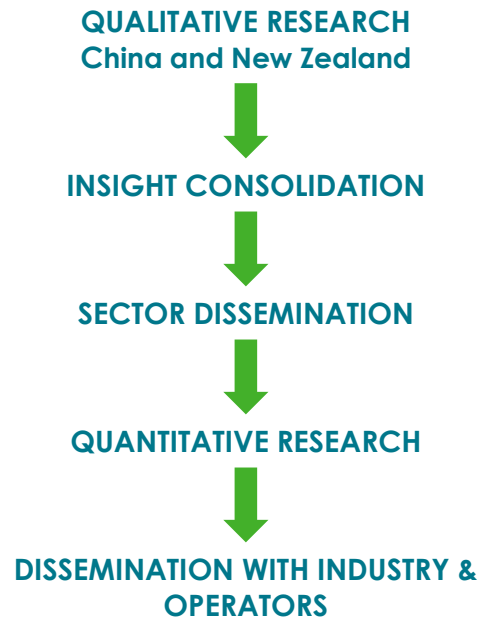
# THE OVERALL TASK



**Build value in the New Zealand visitor sector**  
to and from each Chinese visitor to New Zealand

by being informed and enabled to realise opportunities and build competitive advantage in the China FIT market

## The process





# DISSEMINATION PLAN

## Dissemination Plan

### RTO'S & OPERATORS - DISSEMINATION & ENABLE

| Stakeholders            | Insight Summary Presentations        |                            | Website                  |                     |                   |                            | Workshops    |                    | Webinar      |              | Sector Pres/ Conferences |              |
|-------------------------|--------------------------------------|----------------------------|--------------------------|---------------------|-------------------|----------------------------|--------------|--------------------|--------------|--------------|--------------------------|--------------|
|                         | High Level Summary Pres & Discussion | Overview Pres & Discussion | Overview Insight Summary | Top Tips for Summer | Golf Food Insight | Modules Insight Work Plans | RTO Strategy | Enablement Modules | Operators    | Operator     |                          | Social Media |
|                         | ---10---                             |                            |                          |                     | --2--             | --10--                     |              | --10--             | --10--       | --4--        | 6 months                 | --2--        |
|                         |                                      |                            | 12 months                |                     |                   |                            |              |                    |              |              |                          |              |
| MBIE Steering team      | √                                    | √                          | √                        | √                   | √                 | √                          | √            | √                  | √            | √            | √                        | √            |
| MBIE                    |                                      | √                          |                          |                     |                   |                            |              |                    |              |              |                          |              |
| TNZ                     | √                                    | √                          | √                        | √                   | √                 | √                          | √            | √                  | √            | √            | √                        | √            |
| Government              |                                      | √                          |                          |                     |                   |                            |              |                    |              |              |                          |              |
| TIA                     |                                      | √                          |                          |                     |                   |                            |              |                    |              |              |                          |              |
| Peak Tourism            |                                      |                            |                          |                     |                   |                            |              |                    |              |              |                          |              |
| Industry Bodies         |                                      | √                          |                          |                     |                   |                            |              |                    |              |              |                          |              |
| RTONZ / RTO's           |                                      | √                          | √                        | √                   | √                 | √                          | √            | √                  | √            | √            | √                        | √            |
| <b>PRIMARY AUDIENCE</b> |                                      |                            |                          |                     |                   |                            |              |                    |              |              |                          |              |
| RTO's                   |                                      | √                          | √                        | √                   |                   | √                          | √            | √                  | √            | √            | √                        | √            |
| Operators               |                                      |                            |                          |                     |                   |                            |              |                    |              |              |                          |              |
| - China focused         |                                      |                            | √                        | √                   | √                 | √                          |              | √                  | √            | √            | √                        | √            |
| - China enabled         |                                      |                            |                          |                     |                   |                            |              |                    |              |              |                          |              |
| - China interest        |                                      |                            |                          |                     |                   |                            |              |                    |              |              |                          |              |
| <b>TIMING</b>           |                                      |                            |                          |                     |                   |                            |              |                    |              |              |                          |              |
|                         | Complete Dec 7th                     |                            | Place holder 19th Nov    |                     |                   | Mar- Jun 2016              | Mar-May 2016 | Mar-Jun 2016       | Mar-Jun 2016 | Mar-Jun 2016 | Launch Feb 2016          | FBC          |



# THE ROLLOUT TIMING

|  | November | December | January | February | March | April | May → |  |
|--|----------|----------|---------|----------|-------|-------|-------|--|
| <b>Qualitative Research</b>                                      | →        |          |         |          |       |       |       |  |
| <b>Quantitative Research</b><br>1. Plan<br>2. Field<br>3. Report | →        | →        |         | →        |       |       |       |  |
| <b>Website NZCNTourism Launch</b><br>- Highlevel overview        | 19th →   | →        |         |          |       |       |       |  |
| <b>Content completion and approval</b><br>e.g: Modules, webinars | →        |          |         |          |       |       |       |  |
| <b>Website rebuild review and approval</b>                       |          |          |         | →        |       |       |       |  |
| <b>Social Media Initiated</b>                                    |          | →        |         |          |       |       |       |  |
| <b>Social Media Full programme</b>                               |          |          |         |          | →     |       |       |  |
| <b>Sector Dissemination</b>                                      | ←→       |          |         |          |       |       |       |  |
| <b>RTO Workshops</b>   |          |          |         |          | →     |       |       |  |
| <b>Industry Workshops</b>  |          |          |         |          | →     |       |       |  |
| <b>Webinars / Infographics</b>                                   |          |          |         |          | →     |       |       |  |
| <b>Full Module Rollout Available on Web</b>                      |          |          |         |          | →     |       |       |  |



# RESEARCH

## APPROACH FOR THIS INSIGHT (PRE QUANTITATIVE RESEARCH)

**Review and integration of recent related qualitative and quantitative research**

**PROPOSITION DEVELOPMENT**

**QUALITATIVE RESEARCH**  
*(New Zealand)*

**QUALITATIVE RESEARCH**  
*(China)*

- **Desk research and collaboration**
  - Included integration of insight from recent China market research undertaken for clients in the tourism sector
- **Workshop and consultation with key industry stakeholders** to ensure clear and differentiated propositions and communication approach
- Propositions and concepts developed or researched
- **Multiple intercept interviews in New Zealand over 6 days with Chinese FIT visitors**
  - To test propositions and refine approach – interviews conducted in key tourist locations in Rotorua, Queenstown and Auckland Airport International airside.
- **Qualitative developmental group discussions in China (Shanghai, Beijing, insights drawn from recent previous groups in Guangzhou)**
- **6 developmental groups, 8 co-design interviews in total** with FIT (Chinese visitors) 'avid' travellers who have travelled:
  - long haul out of Asia at least twice
  - have travelled to destinations outside Asia primarily for reasons other than shopping
  - Are considering visiting New Zealand

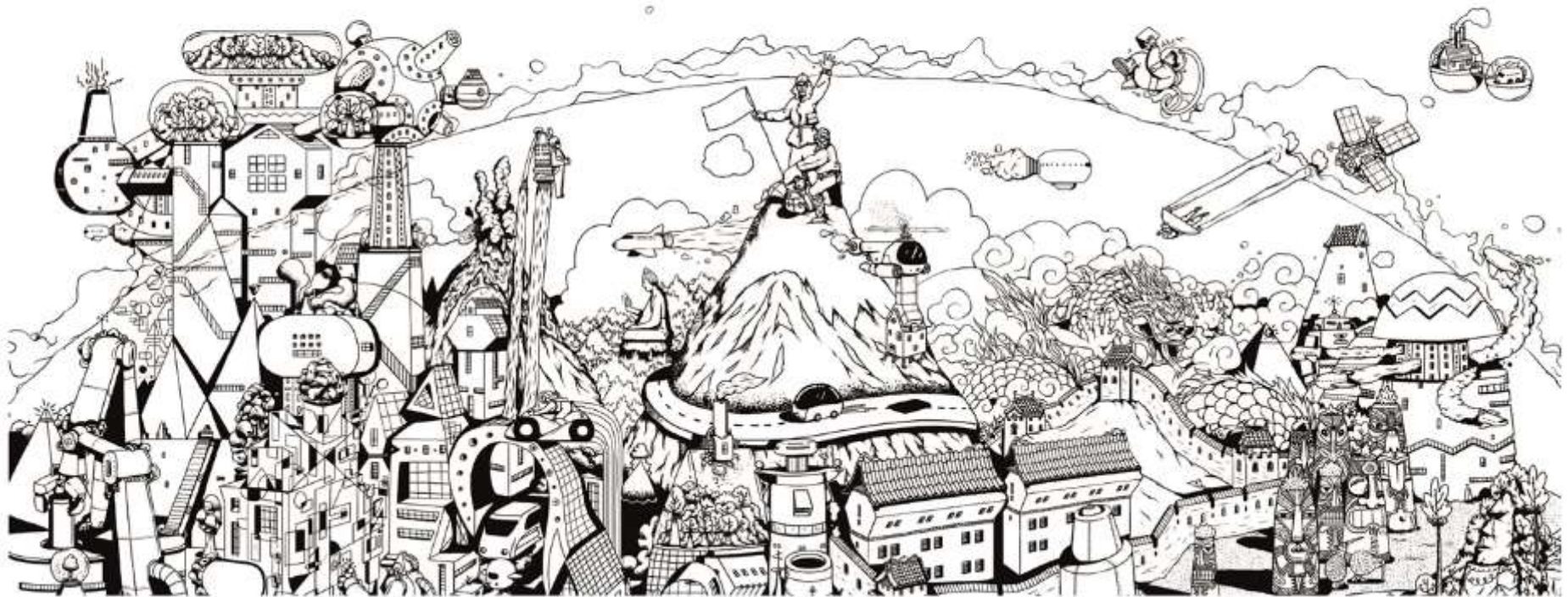


## NAVIGATION OF MODULES

Ten modules focussing on diverse topics are being developed to share the findings for the Insights and Enablement Program.

| CHINA FIT & THEIR NEEDS  | DIGITAL DEVELOPMENT & CONNECTION  |
|--|---|
| <p><i>Meeting cultural needs</i></p> <ol style="list-style-type: none"> <li><b>1. The Context: Understanding needs and attitudes to better deliver value</b></li> <li><b>2. Enabling and optimising experiences</b></li> </ol>   | <p><i>Opportunity for connectivity and building reputation</i></p> <ol style="list-style-type: none"> <li><b>8. Digital Strategy Development</b><br/>Getting your message in front of the China FIT<br/>Digital planning and building<br/>Strategies for content dissemination<br/>Sharing – tools needed<br/>Other digital consideration – resourcing and management<br/>How to</li> </ol> |
| <ol style="list-style-type: none"> <li><b>3. Developing stories and icon experiences</b><br/>Developing and delivering unique stories relevant to #NZCN</li> <li><b>4. Optimisation of current offer</b></li> <li><b>5. Product and experience development</b><br/>Building value</li> <li><b>6. Special interest</b><br/>Activating Chinese interest and delivering regionally</li> <li><b>7. Keeping a finger on the pulse</b><br/>Understanding how to optimise relevance and delivery<br/><i>Activating value</i></li> </ol> | <div data-bbox="977 611 1238 815" data-label="Image"> </div> <ol style="list-style-type: none"> <li><b>9. Seasonal development &amp; activation</b></li> <li><b>10. Regional development and activation</b><br/>Targeting<br/>Sector enablers</li> </ol> <p><i>Enabling growth and development opportunities</i></p>  |
| DELIVERING RELEVANT PRODUCTS & ACTIVATING VALUE  | GEARING UP THE SECTOR FOR VALUE MAXIMISATION  |

# 1. IMPORTANCE OF TRAVEL TO CHINESE



# TRAVEL IS FUNDAMENTALLY IMPORTANT TO THE CHINESE FIT VISITOR



**There is strong social and emotional investment in travel and a desire for unique real and impactful experiences, memories and stories to tell**

*"If I am there, I feel REAL,  
and I can bring it back to  
China with me"*

*"Not being able to travel would feel  
like being a frog at the bottom of the  
well – seeing a small part of the sky"*

## **Social connection**

Sharing, meeting and developing  
friendships, building friend networks

*"I want to feel it, see it,  
memorise it"*

*"I would have to just  
plan the next trip if I  
couldn't travel"*

## **An interest**, hobby

Taking time to search and share

- Talking to friends
- Online
- TV travel programmes
- Travel guides

**Relatively new freedom** –  
opening up of visa  
access

## **New experiences**

Learning – lifestyles, language,  
personal challenge



## **Escape**

Crowded, stressed,  
polluted environment,  
cold, heat, dirt, pressure

**A social status** personal  
reflection of taste, interest,  
sophistication, success

**Scoping** – new lifestyle  
and business opportunity.  
Education opportunity

# SOPHISTICATED, EXPERIENCED, CONFIDENT TRAVELLERS



## Chinese - The FIT visitor

- They have had many different and varied travel experiences – globally – Europe and North America are usually on the list ahead of New Zealand.
- Confident to plan and book independently all aspects of the trip - on line – it is easy and they are practised.
- Time rich or will make multiple and repeat trips to really experience in depth - if they like it.
- The group is important – planning, sharing, socialising, others' reviews and opinions, all being happy, sharing, connecting.
- Live their lives online and on social media – mostly via smartphones.



**We need to deliver, to maintain visitation, especially at the higher value end, where there are many competing global options.**



# TOP TRENDS & CHANGE



- Chinese are living **sophisticated lives with a lot of choices** as to where they go. More countries are opening up to Chinese and many are making the visa application process for Chinese easier and faster.
- Chinese are **travelling more overseas than ever before**.
- They are choosing to **travel multiple times a year**.
- Chinese are **increasingly more sophisticated travellers** and are wanting more out of their holidays. There is a movement away from 'old school' perceptions that travel should be about 'shopping tours'.
- Chinese are looking for **more in-depth experiences**:
  - More sophisticated and more immersive
  - Unique experiences that New Zealand can offer.
- There remains **vast potential for outbound tourism from China to grow** – only 6% of Chinese have passports currently!
- Chinese are **willing to make repeat visits** to destinations they like, and are particularly encouraged in doing so by the availability of multiple-entry visas.

# NEW ZEALAND IS A NICHE DESTINATION



## CHALLENGE FOR NEW ZEALAND

### To sustain and manage high value growth

Deliver consistently great experiences

Continue to build reputation

With growing demand

### WE MUST

### Focus on value UP, not value DOWN

High value visitors

High value experiences

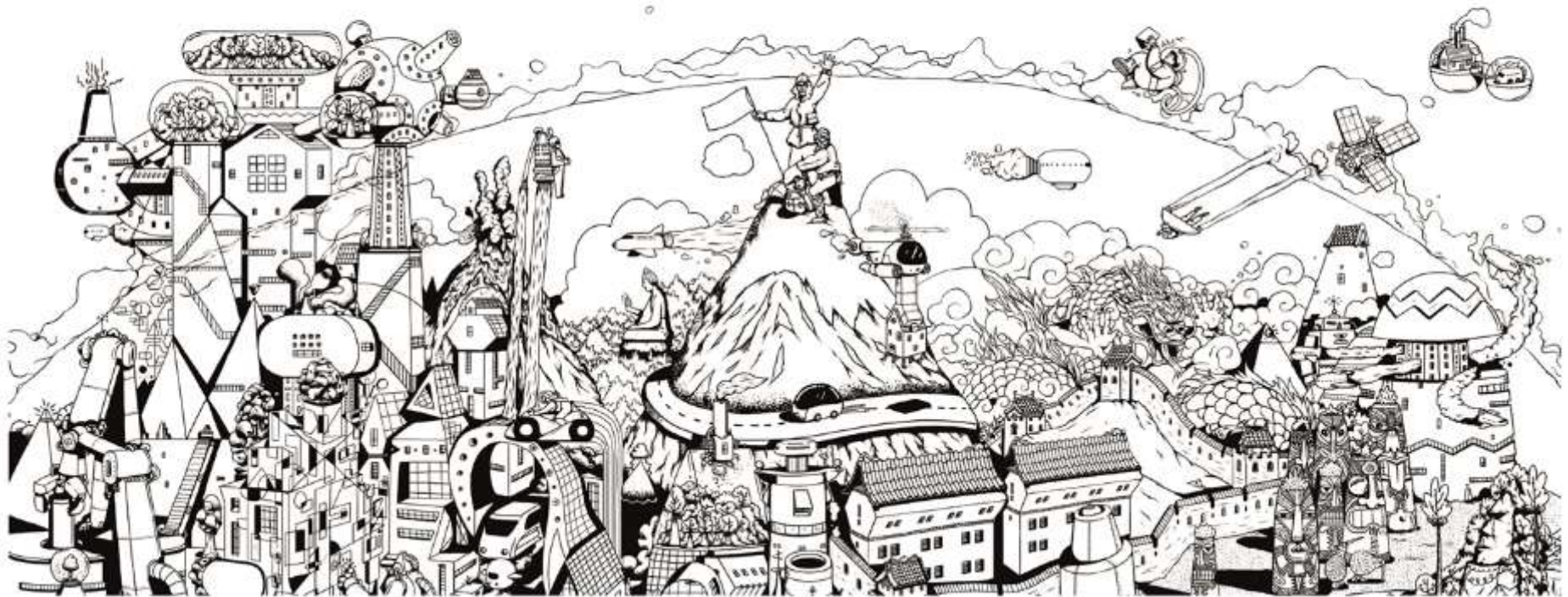
High value participation in experiences beyond sightseeing

### Extend visitation throughout regions and throughout the year

### There is a need for improved tourism support infrastructure

Chinese language, Chinese speakers in the sector, guides, information, instruction, digital accessibility,

## 2. WHY NEW ZEALAND?



# WHY NZ IS ATTRACTIVE TO TO THE CHINESE FIT VISITOR



Place/  
environment

People

Experience

Take me away from....



New Zealand is very attractive  
**Our ordinary is their extraordinary**

- Polluted air, sky and food
- Urban intense living
- Man made environment

- Crowded
- Busy
- Competitive

- Pressured
- Stressful
- Lack of trust
- Difficult to get around
- Repetitive day to day
- Boring

TO ....



- Nature - dramatic, intense, impactful, unspoilt, protected
- Natural intensity of clean air and sky (blue)
- Clean and safe

- Open spaces with fewer people
- Welcoming, trust
- Different / contrasting lifestyles, people, cultures, history

- Easy
- Calm, relaxing
- Safe
- Stimulating

*"We are in a crowded noisy city – I want something different"*



# THE APPEAL OF NATURE: TO EXPERIENCE EVERYTHING CLOSE



***“IF I’M THERE I FEEL REAL – AND I CAN BRING IT BACK TO CHINA WITH ME”***

**New Zealand photos reflect real, “everything close” experiences well, building Chinese desire to personally experience it all for themselves.**

*“Relaxed, casual and free – you can do whatever you want”*

*“The air and the sky – it is so different”*

*“Pure nature – like 100 years ago – the original way”*



***“I want to personally feel it – see if it’s true – be there”***

# NATURE IS CHINESE ACTIVE CONSIDERERS' MAIN REASON FOR VISITING NEW ZEALAND IS



Source: TNZ research to understand Active Considerers' motivations and barriers (TNS Jan FY15)

- For Chinese ACs 70% are interested in holidaying in New Zealand to connect with nature, while 59% say it is also to broaden their minds

| Australia             | China                     | Japan                     | Germany                   | UK                    | USA                   |
|-----------------------|---------------------------|---------------------------|---------------------------|-----------------------|-----------------------|
| Fun & enjoyment (64%) | Connect with nature (70%) | Connect with nature (69%) | Connect with nature (68%) | Learn & explore (61%) | Fun & enjoyment (74%) |
| Learn & explore       | Broaden my mind (59%)     | Relax                     | Interact with locals      | Fun & enjoyment       | Learn & explore       |
| Relax                 | Indulge & pamper(54%)     | Fun & enjoyment           | Broaden my mind           | Relax                 | Sense of adventure    |
| Break from routine    | Fun & enjoyment (53%)     | Broaden my mind           | Learn & explore           | Broaden my mind       | Interact with locals  |
| Refresh               | Relax (53%)               | Interact with locals      | Feel excited              | Break from routine    | Broaden my mind       |

ACs from each market would choose to visit NZ for these reasons, thus expecting NZ to deliver to each of these need states

Question: There are many reasons why we go on holiday – which of the following are reasons why you might specifically choose to visit New Zealand? (% , top five)



**100% PURE  
NEW ZEALAND**

# THE IMAGES CHINESE FIT SEND BACK HELP BUILD THE CYCLE OF REPUTATION



*User Generated images by China FIT are reinforcing our industry images*

What they see on photos is what they get

We must encourage sharing at every opportunity

We know they are heavily influenced by friends and family and their photos



However with the images there needs to be a sense of intensity and other people – don't just represent solitude or landscape when promoting New Zealand

# NEW ZEALAND: BUILDING INTEREST TO ACTIVATION



## 100% Pure New Zealand

**FRESH VIBRANCY**

Of original  
untouched nature

PLACE

+

EXPERIENCE

**EVERYTHING CLOSE**

Zero Distance  
immersion

**Activation =**

As the sense of experience  
and connection grows  
then commitment to  
travel to New Zealand is  
achieved

*Feel it, see it, touch it, do it, taste it, **share it***

# NEW ZEALAND: BUILDING INTEREST TO ACTIVATION



## 100% Pure New Zealand

**FRESH VIBRANCY**

**EVERYTHING CLOSE**  
Zero Distance  
Immersion

### **DIVERSITY**

Variety

Many  
Different  
Contrasting  
Choices  
Options  
Multi  
layered

### **INTENSITY**

**From  
beginning to  
end  
Multi  
layered  
Involving  
Stories and  
experiences**

### **EASE**

*Inclusive  
Accessible  
Serendipity  
  
Welcoming  
Open  
Safe  
Friendly  
Responsive  
flexible*

*Feel it, see it, touch it, do it, taste it, share it*

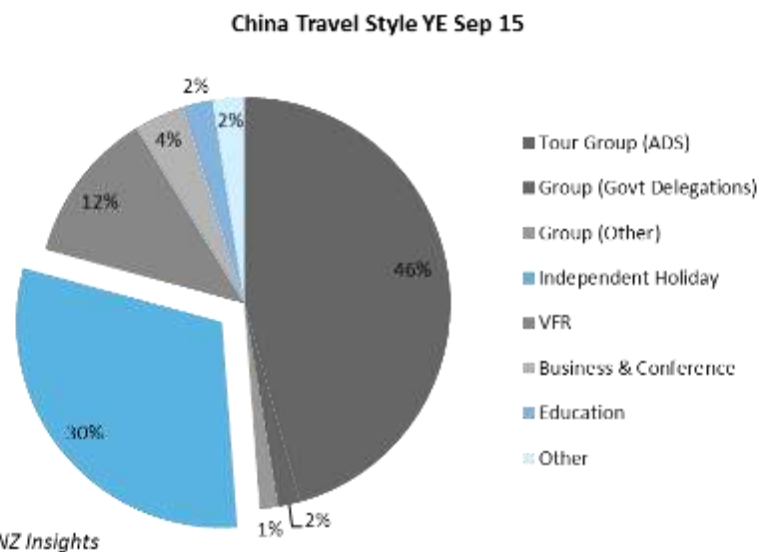
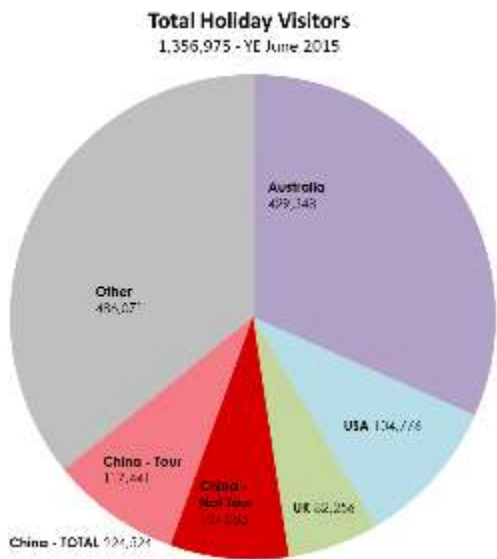
**FORWARD** Ensure things to see and do are in close proximity. Consider how we enable & communicate this?



# CHINESE AND CHINESE FIT ARE IMPORTANT

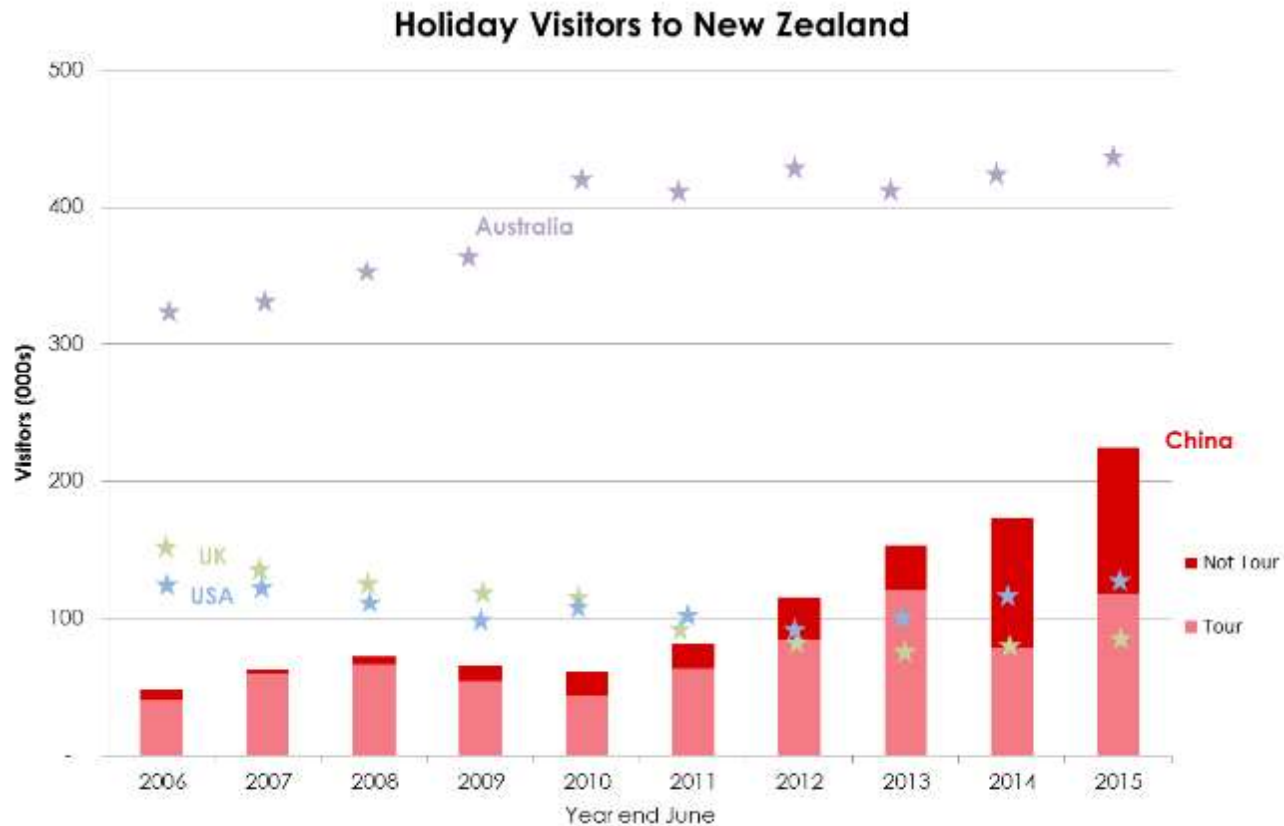
China is now the second largest visitor source behind Australia

Non group tour is now over 50%



- Independent Holiday (FIT) as a % of total arrivals now at 30%

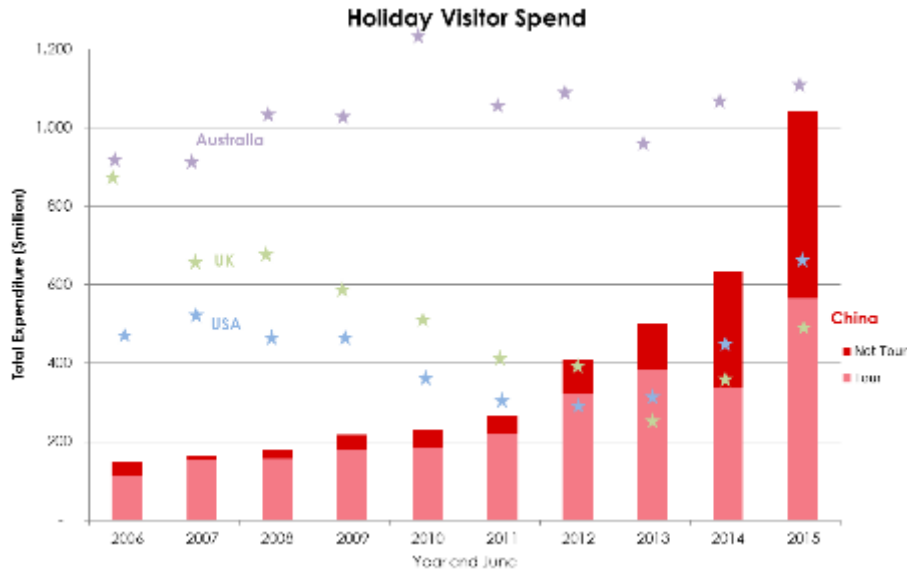
# THE PROPORTION OF FIT IS GROWING RAPIDLY



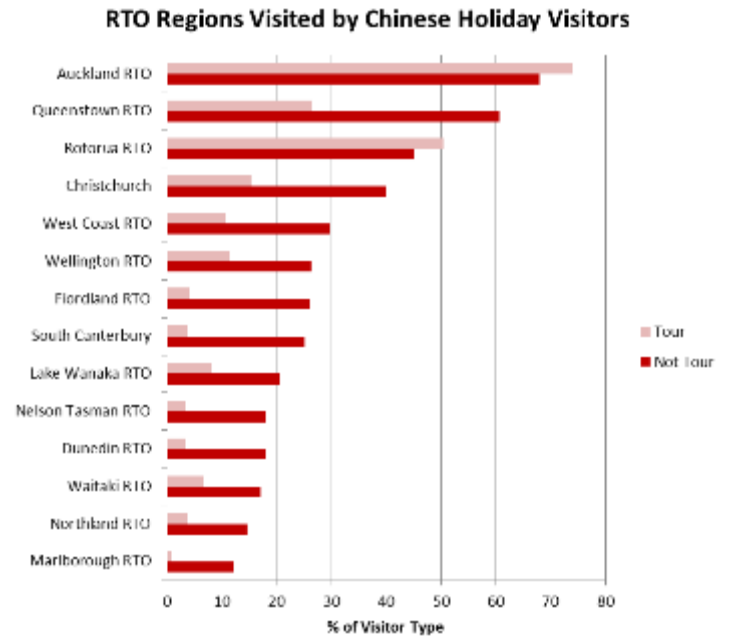
# THE CHINESE FIT ARE VALUABLE TRAVELERS



The spend is high and growing. They have greater propensity to travel widely throughout New Zealand



Growth of Chinese Holiday visitor Spend is equivalent to 35% p.a for last 5 years  
(58% p.a. for non-tour Chinese Holiday visitors)



### Non-tour Chinese visitors:

- Stay longer
- Visit more regions
- Visit a more diverse range of regions





FORWARD

# BRINGING CHINESE VISITORS TO LIFE



# NOT ALL CHINESE FIT VISITORS ARE THE SAME...NOR DO THEY WANT THE SAME THING



## Understanding and targeting is important to:

- Attract high value visitors
- Target our product development and communication at people who will respond
- Understand who will be interested in our different experiences and what the development opportunities are
- Build regional and seasonal spread
- Help grow the segments that are of value to us

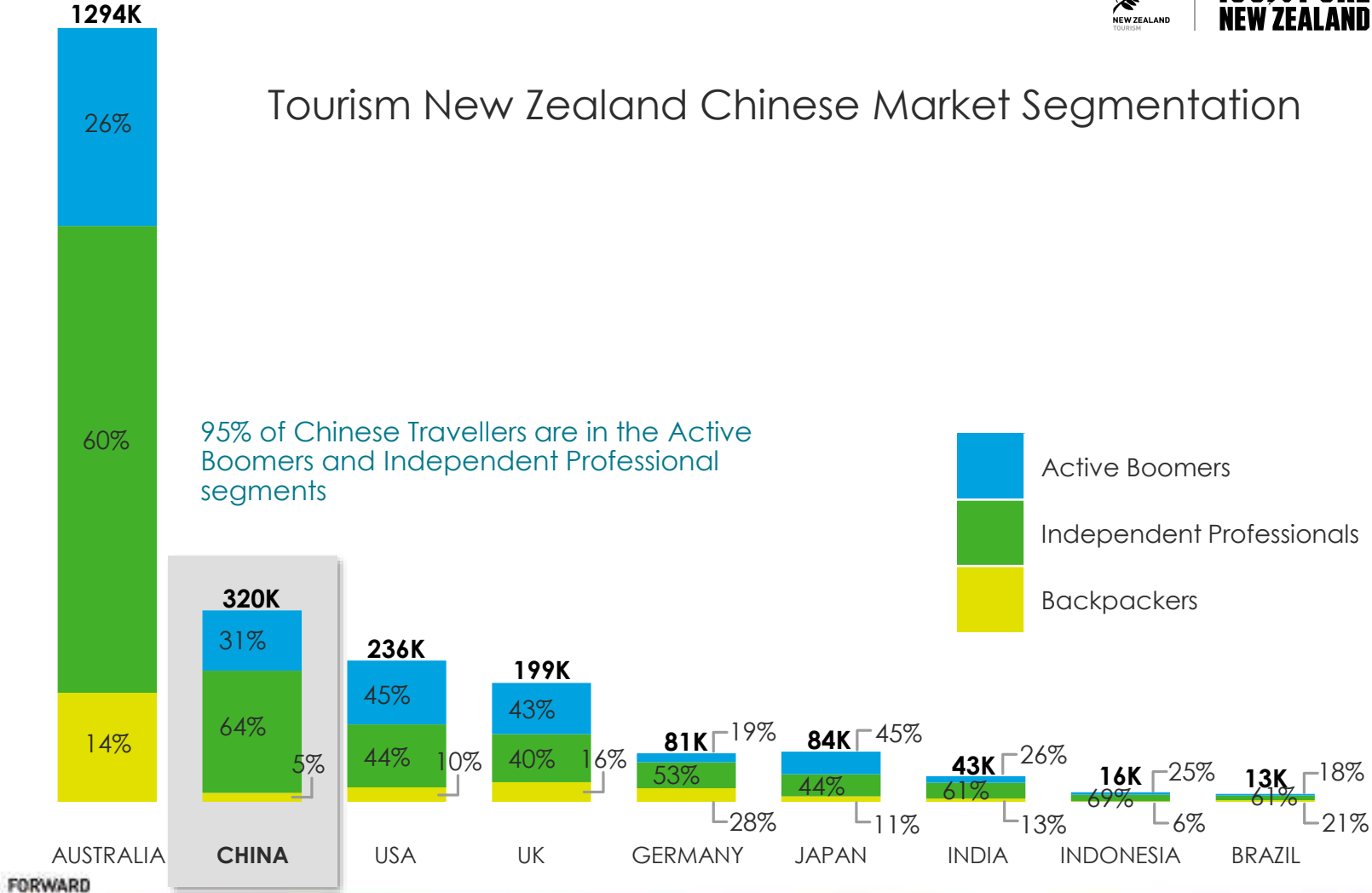


# CHINESE TRAVELLER – KEY SEGMENTS



**100% PURE  
NEW ZEALAND**

## Tourism New Zealand Chinese Market Segmentation



Source: Statistics New Zealand International Travel and Migration, YE Aug 2015, Holiday only

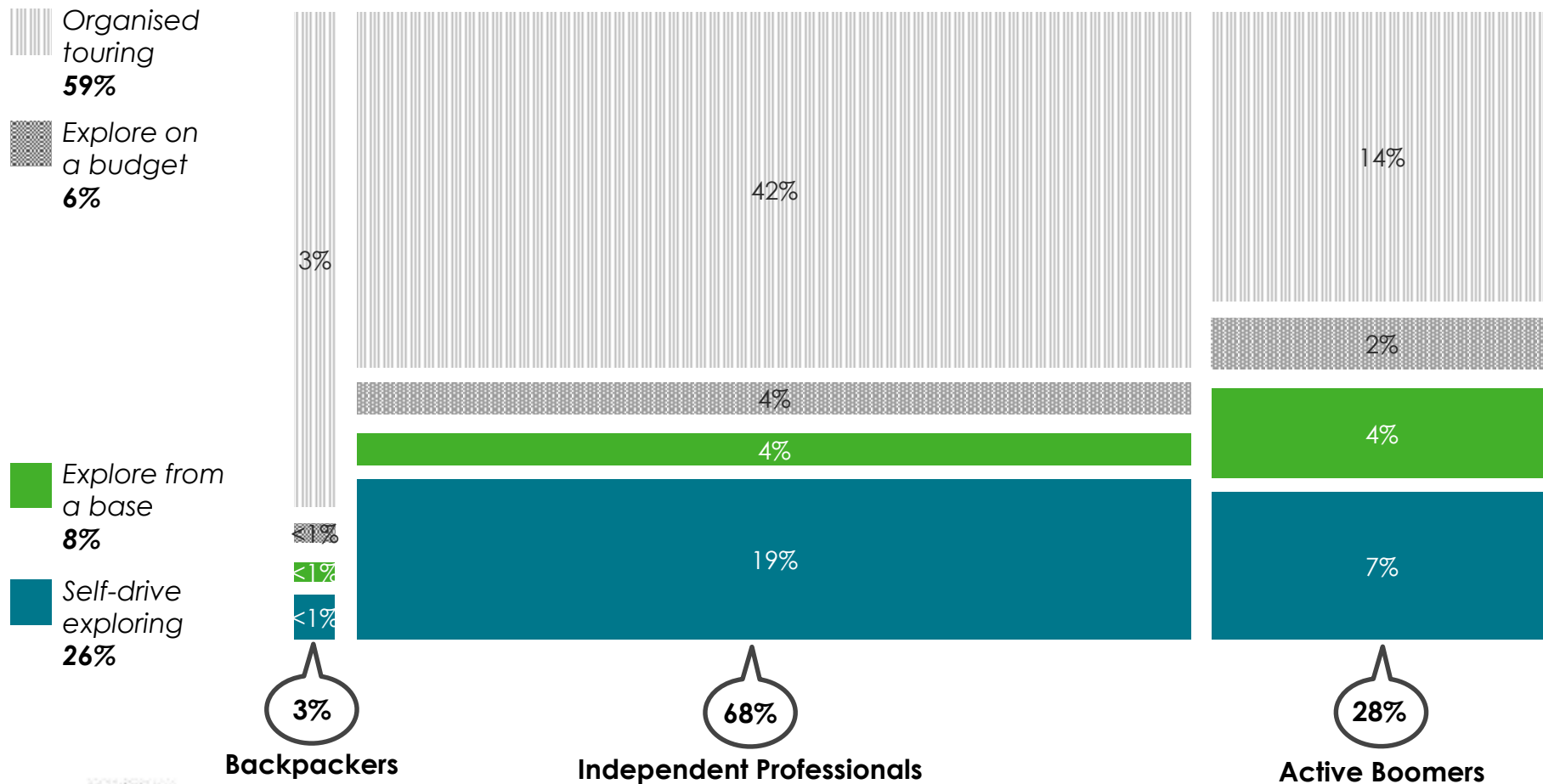
# CHINESE TRAVELLERS – TRAVEL STYLE



Independent professionals make up around 2/3 of the FIT sector from China, and Active boomers around 1/3. The proportion of FIT is expected to grow relative to organised touring.



**100% PURE  
NEW ZEALAND**



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# THE CONTEXT

## Targeting



### Not all Chinese FIT are the same:

Some will offer more opportunity and be a better fit for some tourism operators  
We will have visitors with different needs  
Some targets are more easily activated for regional and seasonal growth

Targets that offer substantial potential are.....

### Tourism New Zealand Segmentation:

China FIT – primarily **self driving Independent Professionals** (25-54) and **Active Boomers** (54+)

### Trip Order:\*

First time visitors are more focused on main must do icon experiences and regions  
Repeat visitors are more interested in in-depth regional experiences – “off the beaten track”  
→ We must deliver great experiences – To build repeat high value re-visitation  
→ Repeat visitors are a key target for regional growth  
→ Key sharing opportunity amongst their friends to encourage them to visit New Zealand

### Self employed:\*

Travel outside Chinese holidays and travel for longer  
→ Key target for regional and seasonal growth  
→ More from second tier cities and southern industrial regions in China e.g.: Hangzhou, Nanjing, Chongqing



### Families with:\*

*School age children  
(clusters of families travelling  
In convoy)*

Desire for family bonding and growth  
High wealth in 30+ age group  
School holidays – June – September / our “winter and spring” attractive  
Children highly influential in decision making



### Cluster/Group Ethos

*Their needs are an important consideration*

This group is important – for planning, sharing, socialising, others' reviews and opinions. There is opportunity to offer different levels of experience.  
Watching and photos can be as exciting as doing.  
Group/cluster needs are an important consideration.  
Setting up food to respond to larger groups is important.

### FORWARD

\* To be evaluated further during quantitative research stage of project

# SEGMENT: Active Boomers

Market: China

Date: As at 1/10/15



STRATEGY: 31% of holiday visitors

## PROFILE:

Age: 55-74

Shanghai, Beijing, Guangdong

Desire: To get in touch with nature, have fun and enjoy myself, to broaden my mind

Keen desire to arrive in Sep-Nov and March - April

## CATEGORY:

Self drive 26%\*\*

Stay: hotel, motel & luxury

LOS: 1-3 weeks

Ave spend:

Travel with: partner/spouse

Organised group tour 50%\*

Stay: hotels

LOS: 3 days

Activities: tbc

Ave spend: tbc

\*50% ABsV2 are on an organised group tour

\*\* 26%% of ABsV2 self drive holiday

## QUESTIONS:

- What / where the recommended things to see and do are
- How easy it is to travel around
- How long it takes to travel between the main attractions
- Where I should get information about how to organise a holiday to NZ

SCENIC ATTRACTIONS: Beaches & coastal, native forests, geothermal, lakes & rivers, local towns

ACTIVITIES: wildlife, shopping New Zealand souvenirs, local arts and crafts, local cuisine, Maori culture and performance, historic sites, museums & galleries.



**100% PURE  
NEW ZEALAND**



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# SEGMENT: Independent Professionals

Market: China

Date: As at 1/10/15



## CATEGORY:

Self Drive Exploring 27%\*\*

Stay: hotel, motel & luxury

LOS: 1-3 weeks

Ave spend:

Travel with: partner/spouse

Organised Touring 61%\*

Stay: hotel

LOS: 3 days

Ave spend:

Travel with: partner/spouse

\*61% IPSV2 are on an organised tour

\*\* 27% of IPSV2 self drive

STRATEGIC ROLE: 64% of visitors

## PROFILE:

Age: 25-54

Shanghai, Beijing, Guangdong

Desire: To get in touch with nature, to broaden my mind, to learn and explore new things, have fun and enjoy myself, to take a break from routine, relax and refresh

## QUESTIONS:

- What / where the recommended things to see and do are
- How easy it is to travel around
- What the transportation options are for travelling within NZ

SCENIC ATTRACTIONS: Beaches and coastal, geothermal, fjords, lakes & rivers, cities

ACTIVITIES: hot pools, historic sites, local cuisine and wine, shopping – arts and crafts, local markets and New Zealand souvenirs, wildlife

# DIFFERENT CHINESE FIT VISITORS

## KEY LEARNINGS



There is a clear difference in first and subsequent trips to New Zealand

### FIRST TIME VISITORS

- Take more of an overview of key popular destinations and “must do” experiences, travel more quickly, including more sightseeing and less activities, often a shorter stay. Many are intending to return or have clear plans to return.
  - We must ensure they have a good experience to influence others and support a return visit to New Zealand.
  - As demand grows we must establish the reputation of more “must do” icons and destinations for inclusion in first time itineraries. This is needed to reduce pressure on existing experiences.
  - Language assistance and support infrastructure (guides, i-SITE access, internet and Wi-Fi access and coverage) are particularly important for first time FIT visitors.
  - Friendly, tolerant courteous welcome will help set New Zealand apart from other destinations.

### SECOND TIME VISITORS

- Tend to choose a region to explore for longer and in more depth and go more “off the beaten track”. Follow at a more relaxed pace, participating in more activities, and trying more new and undiscovered experiences.
  - Targeting second time visitors is a key strategy in encouraging regional and extended seasonal Chinese visitor growth,
  - The strong intention for second plus visitation means this is a very efficient target for growth,

### SELF EMPLOYED PEOPLE TEND TO HAVE LONGER TO TRAVEL – 10 DAYS TO 2 MONTHS

- Prefer to travel outside the main Chinese holidays,
- Are more flexible and spontaneous,
- Tend to be more adventurous,
- Often have higher incomes or/and propensity to spend,
- Spend more time in less well known areas and regions,
- Visitors from Chinese cities and provinces with high levels of commercial / self employment e.g. Guangzhou and second tier cities will deliver visitors of greater value to second tier regional development,
- The greater tendency to pay for activities and take more time in New Zealand is valuable.
- The flexibility to travel at any time and more holidays, makes them a strong target for season extension and return visitation.

### FAMILIES FOLLOW THE CHINESE SCHOOL HOLIDAYS. THEIR SUMMER HOLIDAY FROM JUNE – SEPTEMBER OFFERS STRONG POTENTIAL FOR NEW ZEALAND “COOL” TEMPERATE SEASON TRAVEL

- New Zealand is cool and relaxed (compared to THE Northern Hemisphere) and an attractive family destination at this time.
- This 3 month period offers an extended window of opportunity for targeting and promotion.





# UNDERSTANDING THE DIFFERENT GROUPS

## Operator Product Development

Understand who you are targeting and know what they need.

### 1. Low Confidence Package Tours – May return as FITs next time

Group, organised  
low budget, limited spend on activities. Short stay.

### 2. Emergent CHINA FIT travellers

Evolved out of package tours or newer travellers – DIY but not very confident.

Find friends to travel in a group. Want an overview of NZ, a tick the box approach to NZ travel. About experiencing up close and having all the bragging rights, Are they just sticking to the “must do” list? More conservative, so entry level product for toe dipping?.

### 3. More confident, experienced and sophisticated, more like the standard FIT from other countries.

Are you looking at more adventurous people? 2<sup>nd</sup> time visitors to NZ, want more immersive activities, willing to go beyond the “10 Must do’s “ of NZ

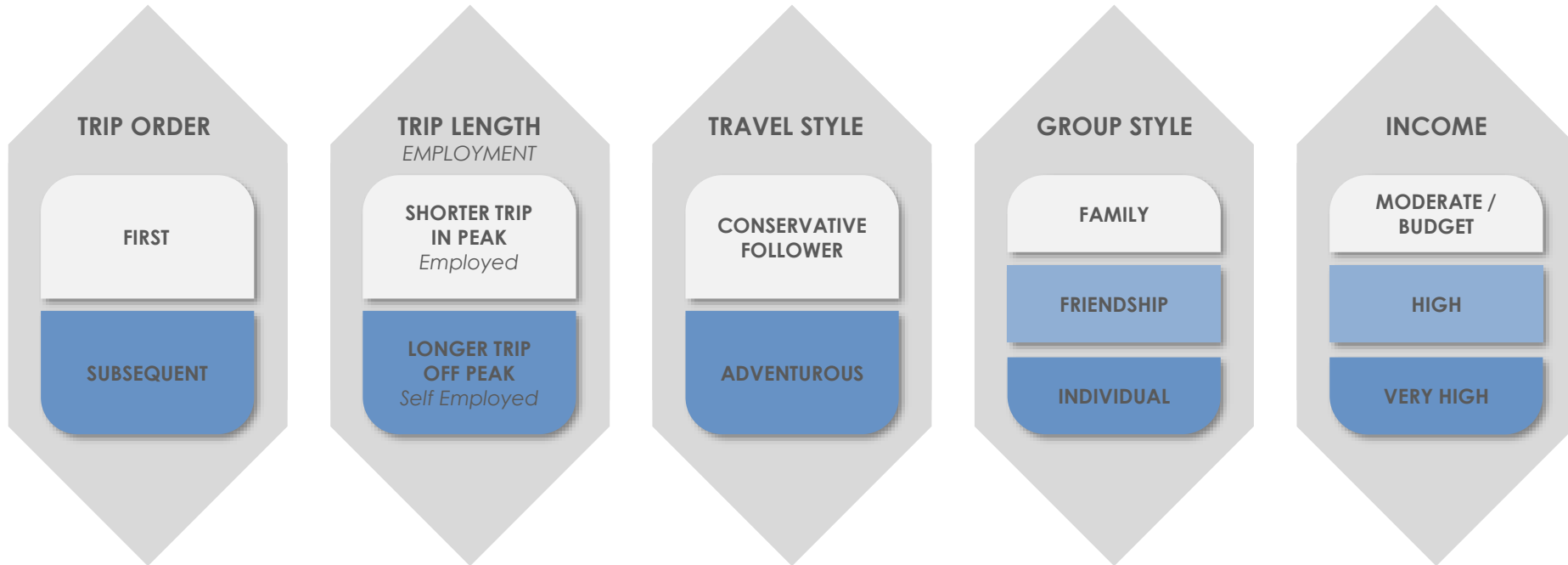
## Industry Sector Development

- It's useful to understand what the strategic initiatives in your region are?
- **Then look at how you targeting the higher value travellers?**
  - Self employed in 1<sup>st</sup> and 2<sup>nd</sup> tier cities who are more flexible with travel times.
  - 2<sup>nd</sup> time visitors more likely to be interested in regions e.g.: visit Whanganui, go to the Coromandel.
  - 2<sup>nd</sup> time more likely to come out of season.
  - 2<sup>nd</sup> time more likely to spend a longer time in NZ.
  - And they may spend it only in one place.
- **Look for cross city promotions** – e.g.: promote Bay of Plenty in Queenstown etc. to first time travellers.

# NOT ALL CHINESE FIT VISITORS ARE THE SAME...



There are 5 key factors differentiating the Chinese FIT visitor



- Greatest impact on **where to visit** – main destinations or second tier regions
  - Main regions - first trip focus. Second trip - more activities in more depth, and linked to other areas
  - Secondary regions target (repeat visitors)
- Greatest impact on the **length of trip, time of year and regional immersion**
  - Season extension and special interest extended experiences target self employed, longer trip visitors from Southern China and second tier cities
- Greatest impact on **style of travel and activities**
  - Special interest e.g. cycling, hiking, and adventure experiences, new developmental experiences target adventure seekers
- Greatest impact on **accommodation, food and choice of activity**
  - Winter season - target family school holiday
  - Secondary regions - target individuals
- Greatest impact on **spend and activities**

# OPPORTUNITY TO TARGET FOR HIGH VALUE AND REGIONAL/SEASONAL GROWTH



## KEY CHALLENGE

To cope with demand growth in most popular areas/seasons

### Go beyond the beaten track

Extend and differentiate "icon" must do experiences and places

**Lead opinion and build reputation**

More key attraction overview

### TRIP ORDER

**FIRST**

**SUBSEQUENT**

Short trip – 7-14 days  
peak holiday focus

### TRIP LENGTH EMPLOYMENT

**SHORTER TRIP  
IN PEAK**  
Employed

**LONGER TRIP  
OFF PEAK**  
Self Employed

Must do – popular

### TRAVEL STYLE

**CONSERVATIVE  
FOLLOWER**

**ADVENTUROUS**

More safe and familiar

### GROUP STYLE

**FAMILY**

**FRIENDSHIP**

**INDIVIDUAL**

More natural sights  
Less activities

### INCOME

**MODERATE  
/ BUDGET**

**HIGH**

**VERY HIGH**

More in depth and focused  
More time and less travelling

More time 10 – 30 days

More off the beaten track

More independent and impulsive

More personalised  
More unique  
More activities

## KEY CHALLENGE AND OPPORTUNITY

**Regional** development – build awareness of rewarding, differentiated and in depth experiences in different regions

**Seasonal** development – try a region at a different time of the year – you have to come back to...

**New product** and **icon** development – What is good in different places

# DIFFERENT TARGET OPPORTUNITIES

## TRIP ORDER TO NEW ZEALAND



New Zealand is known as a destination to come back to – you can't do it all in one trip – and there is lots to see and experience.



### OPPORTUNITIES

- Target second and third visitation for:
  - Regional and seasonal extension
  - Longer experiences e.g. 2-3 nights, cycling, hiking, boating.
- Target extension experiences – overnight, or 1 day 2 night experiences targeted at returning travellers.
- Ensure maintain connection with visitors and promote new, different, more immersive experiences.
- Build awareness of new and different “must do” experiences while in New Zealand – for the next trip.

# DIFFERENT TARGET OPPORTUNITIES

## LONG TRIP *SELF EMPLOYED*



Employment status (e.g. employed in corporate government or self employed/commercial) has a substantial impact on travel planning, timing, length, degree of immersion and number of trips planned.

Self employed are relatively time rich, flexible, avoid main holidays, travel more slowly and in depth, more open to serendipity and discovery.

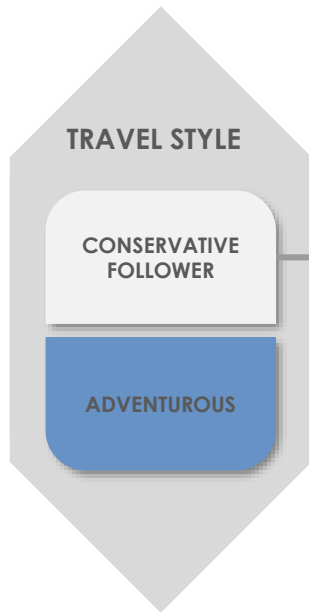


### OPPORTUNITIES

- Target Guangzhou and second tier commercial centres for longer stay itineraries and regional/seasonal extension.
- Clearly deliver longer and shorter itinerary options.
- Prioritise the development of second tier "icon" "must do" destinations to relieve potential increasing peak demand relating to those who must plan around national holidays.

# DIFFERENT TARGET OPPORTUNITIES

## CONSERVATIVE



### **Search**

- Tend to search Chinese sites mainly
- Less likely to consider or be aware of NZ local & "official" sites

### **Itinerary**

- Follow others to iconic experiences
- Tend to "collect" popular "must do"
- Need review and recommendations to have confidence
- Tend to tightly and often over structure itinerary

### **Activation**

- Key Opinion Leaders (KOLs), top rated itineraries, most popular must do
- Images, ratings

### **Product**

- Shorter (20 minutes – 2 hours), operator reputation, easy and challenging
- Reassurance / confidence, assistance and Mandarin translation (QR code)

## **OPPORTUNITIES**

### **Conservative**

- Guidance with a Mandarin speaker – by region, by day (personalised).
- Better utilisation of i-SITEs – recognition, explanation (free), knowledge of Mandarin speakers, awareness (with visa, at air arrival, at accommodation).
- 24 hours assistance line in Mandarin.
- Personalised independent trip organisation (and accommodation, activities/transport).
- New Zealand driven, design your own itinerary options (online button and calculator).
- Promote Official New Zealand site – [Newzealand.com](http://Newzealand.com)

# DIFFERENT TARGET OPPORTUNITIES

## ADVENTUROUS



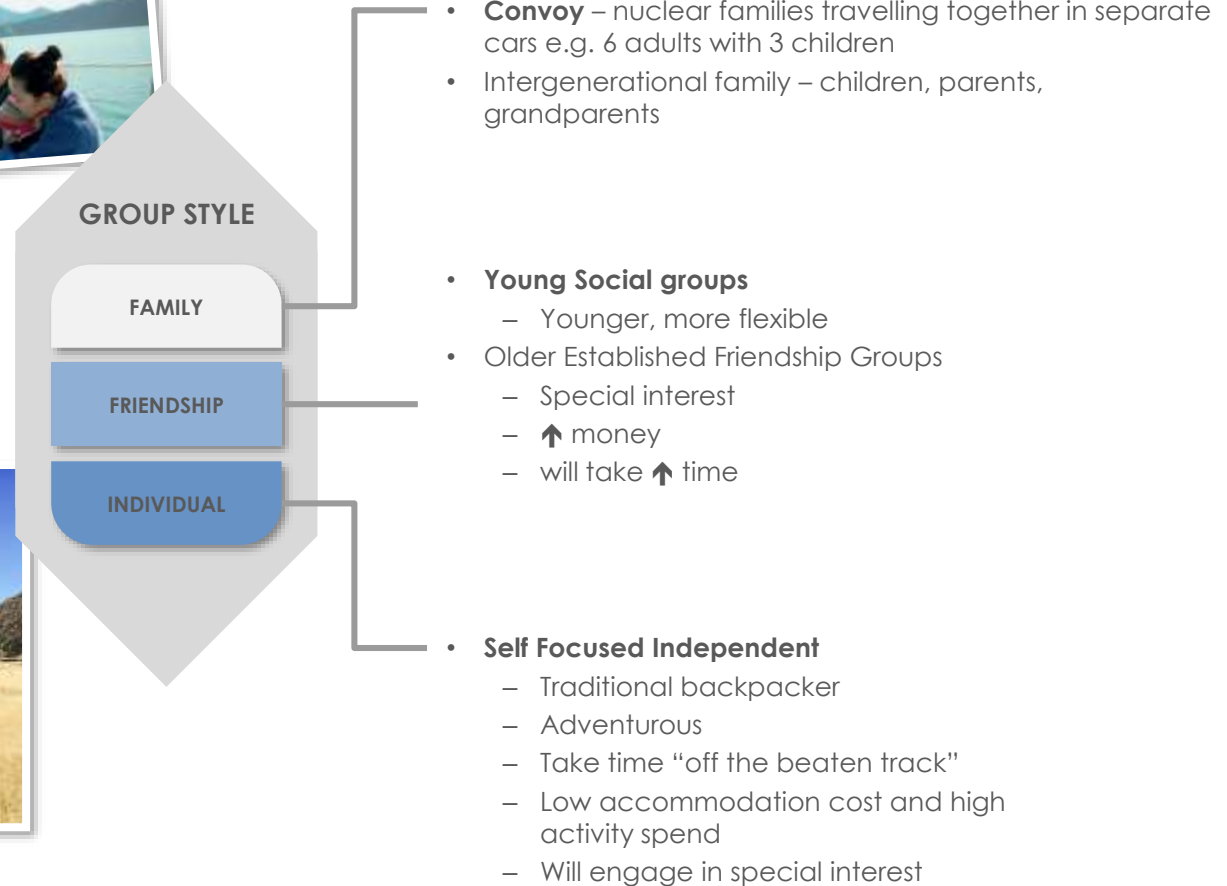
### OPPORTUNITIES

#### **Adventurous**

- Targeted "adventure" experience in regions through hiking, biking, skiing, fishing, sailing, golf, food, luxuries
- Organisations in China and specialist site networks medias
- Off the beaten track itineraries – e.g. pawa diving, heli-bush/hunting, live like a local, fly drive immersion.

# DIFFERENT TARGET OPPORTUNITIES

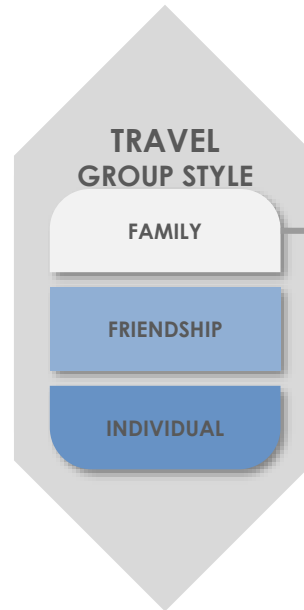
## TRAVEL GROUP STYLE





# DIFFERENT TARGET OPPORTUNITIES

## FAMILY



### Convoy Family Clusters

Travel during Chinese school holidays

- Child oriented
- Accessible, easy activities

### Intergenerational Family

- Short – 20 minutes to 2 hours (maximum)
- Facilitating bonding – time sharing together
- Wi-Fi free – play on gadgets
- Play grounds
- Feed the ducks
- Communal cooking facilities

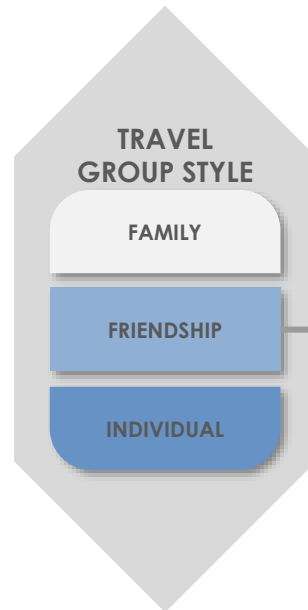


### IMPLICATIONS/OPPORTUNITY

- Family targeted holidays: June – September
  - Family trips to temperate (cool... hot... hot... ) New Zealand
  - Uncrowded, relaxed time
  - Longer trip (2 weeks plus) more relaxed immersion time in each place
  - Ski play, learn to... ski/farm, animal park, playgrounds
  - Bragging rights even adults are scared to do – sky dive, sleep in a unique space (Hobbit Hill, tree house) stargaze, wonders of the world
  - Sail a boat (optimist), ride a horse

# DIFFERENT TARGET OPPORTUNITIES

## FRIENDS



### Young Social

- Friendship groups travelling together – mixed, only women, only men
- Seeks challenge with ease – travel is stimulating and exciting, pushes boundaries... but not difficult, rushed or in any way pressured
- Camper van, car, public transport, homestay, farm stay, affordable self cook accommodation

### Established Friendship

- Independent friendship groups or couples post children. Time rich, financially well off
- Relatively short experience 1-4 hours or overnight
- Extended and private group experiences

### IMPLICATIONS

#### Young Social

- Easy immersion experiences
- Safe adventure – many experiences to share, back stories to add to the story telling and give meaning and uniqueness
- Ability to do things together – but layered so all can participate in different ways

#### Established Friendship

- Experience local life – want depth, “act like a local”

### OPPORTUNITIES

- Photography – opportunities for photos, special spots, specific times, record and share
- Enabling groups to form – similar travel interest, engage online
- Different experiences for different groups – active adrenaline, food, nature
- Create and share stories that make an experience or place unique
- Flexible and tailored options
- Genuine, unique, local experiences
- Self cook – BBQ cooking with Asian flavours
- Encouraging regional repeat visits – developing and maintaining relationships



FORWARD

# SEASONAL DEVELOPMENT



# SEASONAL DEVELOPMENT & EXTENSION



**There is a strong propensity for extended seasonal development.**

The Chinese have a clear view of the holidays in their calendar year and look ahead to these.

They often plan four international holidays in twelve months. Some long and some short haul.

There are triggers that can be activated throughout the year. Websites must leverage these opportunities.

**Communicate that *'whenever you want to come there are great things to do and experience'*. Show the reality (our seasons are not like China) and the contrasts.**

Talking only of New Zealand seasons without any context can be misleading and confusing for Chinese.

- From their perspective “winter” = misery.
- And “summer” = too hot.
- They often think from their perspective of what a season is like, and do not really comprehend that our seasons are far more moderate, less extreme than theirs. E.g. a Beijing winter is cold, dark, miserable and often highly polluted – so some consider why would they want to travel to New Zealand during a New Zealand winter? What is there to experience in winter? They need to understand what our seasons can be like and why each season is a must do.

# SEASONAL DEVELOPMENT

## THE CHINA NEED – Chinese FIT in CHINA

## THE NEW ZEALAND OPPORTUNITY – for CHINA FIT in New Zealand to:

|  | HOLIDAY TRIGGERS   | ESCAPE FROM   | REGIONAL   | NATIONAL   | INTEREST  |
|--|--|---|--|--|---|
| <p>DEC – FEB</p>  <p><b>Winter</b></p>   | <p>Chinese New Year (10 days)</p> <p>+</p> <p>Winter School Break (2 weeks)</p> <p><b>Combined = 1 month window of China FIT</b></p>                                     |  <p><b>Extreme Cold &amp; Dark Days</b></p>            |  <p><b>Enjoy temperate warm weather - Moving away from main tourist locations/crowds</b></p> <ul style="list-style-type: none"> <li>• “Off the beaten track” – away from Chinese crowds</li> <li>• Extend “must do” icon locations and activities – e.g. Taupo, and Top of the South, Kaikoura</li> </ul> | <p>Warm, fresh, clear sky (compared with Europe)</p>   | <ul style="list-style-type: none"> <li>• Adventure</li> <li>• Sailing</li> <li>• Flying</li> <li>• Fishing</li> <li>• Food</li> <li>• Glamping</li> <li>• Kayaking</li> <li>• Trekking (day+)</li> </ul> <ul style="list-style-type: none"> <li>• Special interest – cycling, food</li> </ul> |
| <p>MAR – MAY</p>  <p><b>Spring</b></p>   | <p>No National Holidays but a good time for Entrepreneurial / Self Employed to</p> <p>Travel outside of Chinese holidays</p> <p><b>Tier 2 Cities + GuangZhou FIT</b></p> |  <p><b>Peak Travel Crowds</b></p>                      |  <p><b>Independent travellers – celebrate natural beauty and sense of freedom</b></p> <ul style="list-style-type: none"> <li>• Autumn beauty</li> <li>• Photography</li> <li>• Tranquillity</li> <li>• Spectacular gardens</li> </ul>   | <p>Settled weather – temperate</p> <ul style="list-style-type: none"> <li>• Non Chinese experience – uncluttered, peaceful, relaxed</li> <li>• Access it all – beach to mountain</li> <li>• New Zealand at a relaxed pace</li> </ul> | <ul style="list-style-type: none"> <li>• Hike/walk</li> <li>• Camp/glamp</li> <li>• Hot water beach</li> <li>• Photography – light contrasts</li> <li>• Food</li> </ul>   |
| <p>JUN – AUG</p>  <p><b>Summer</b></p>  | <p>School Holiday 1 June – 1 September (combined is an 8 week window of China FIT)</p>   |  <p><b>Soaring Heat, humidity &amp; Pollution</b></p> |  <p><b>Temperate cool beauty</b></p> <ul style="list-style-type: none"> <li>• “Family” adventures and bonding fun</li> <li>• Escape the heightened humidity heat and crowds</li> <li>• Mountain, geo thermal, fiords, North Island temperate</li> </ul>   | <p>Temperate cool season</p> <ul style="list-style-type: none"> <li>• Outdoor freedom, peaceful, invigorating</li> <li>• All year round activities</li> <li>• Extended family experiences</li> <li>• Good daylight</li> </ul>        | <ul style="list-style-type: none"> <li>• Hot pools/thermal</li> <li>• Ski – play, learn, do</li> <li>• Whale migration from Antarctica to the tropics</li> <li>• Food</li> </ul> <ul style="list-style-type: none"> <li>• Snow, huskies, drive</li> </ul>                                     |
| <p>SEP – NOV</p>  <p><b>Autumn</b></p> | <p>National Day Holiday and Mid Autumn Festival</p> <p><b>(combined is about a 1 month window of China FIT)</b></p>  |  <p><b>Travel Crowds of other destinations</b></p>   |  <p><b>Fresh rejuvenation – go where there are no crowds</b></p> <ul style="list-style-type: none"> <li>• Flowers / birds – (Manawatu/ Taranaki)</li> <li>• Animals – (Kaikoura/ Marlborough)</li> <li>• Photography</li> <li>• Bird song (Wellington)</li> <li>• North Island (Northland)</li> </ul>   | <ul style="list-style-type: none"> <li>• New growth</li> <li>• Away from the “maddening crowds” – of Europe, Korea, South East Asia, North America)</li> <li>• Immersion</li> </ul>  | <ul style="list-style-type: none"> <li>• Gardens</li> <li>• Biking</li> <li>• Golf</li> <li>• Adventure</li> <li>• Family</li> <li>• Food</li> </ul>  |

# CHINESE ACTIVE CONSIDERERS

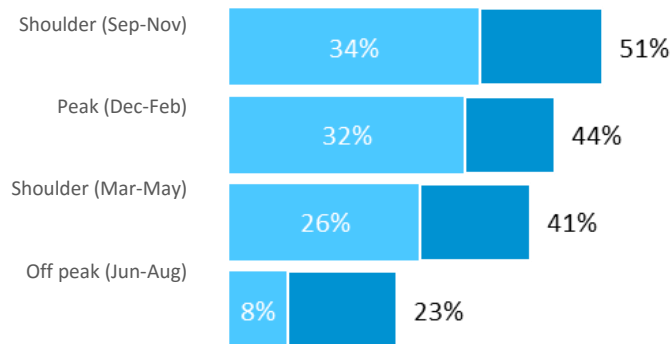
INDICATE THAT THE SHOULDER PERIODS ARE CERTAINLY CONSIDERED AS A TIME TO VISIT NEW ZEALAND



## Total Active Considerers, AC Monitor, %, Qtr 1 FY16

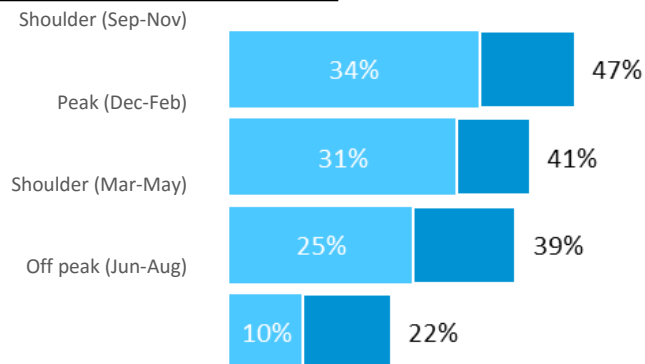
■ Preferred season ■ Would consider but not preferred

### Total Active Considerers



- All Active Considerers, 34% would prefer to arrive in the Oct-Nov period, however 51% would consider arriving at this time
- Coinciding with Golden Week, consideration and preference for the Spring shoulder is higher than for other seasons

### Total Independent Professionals



# OPPORTUNITIES TO DRIVE SEASONAL TOURISM



## → Follow their seasons

- Understand their needs, what they are wanting to experience in different months of the year.
- Promote ahead to optimise the different appeal of the seasons and their needs.
- Those tied to short holidays may plan more than one holiday trip to New Zealand within twelve months.

## → Target Self Employed (e.g. from Guangzhou, tier two cities)

- They have the flexibility and desire to come outside the Chinese holiday periods.

## → Target High End Families – School Holidays – 1<sup>st</sup> June to 1<sup>st</sup> September – potentially substantial

- Strong school holiday appeal for family bonding and relaxed temperate/cool experiences of New Zealand. They want to escape the oppressive heat in China.
- New Zealand has temperate winter conditions (our winter is like the Chinese spring or autumn). In photos, show the layers of clothing, green grass growing next to snow capped mountains to demonstrate New Zealand does not close down in this period. For many 14-15 degrees Celsius is not cold and in fact is a comfortable travelling climate.
- Self employed high-end parents have flexibility to travel in school holidays and often do not spend time with their children week to week (except when holidaying) and have high disposable incomes.

## → Clearly communicate moderate nature of New Zealand climate – especially Spring/Autumn.

## → Target and communicate to children (who often are very influential in decision-making) as well as parents.

- Ensure the offer and products are fun, challenging, exciting and different.



# SEASONAL PRODUCT EXTENSION

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## Product

- Seasonal promotion and discounts will help attract and drive seasonal visitation, chatter, visibility and sharing.
- Promoting Winter, Spring, Autumn “only” experiences that can not be done any other time can trigger “off season” travel e.g. whale migration, flowers/garden blooms, Southern lights, Bluff oyster season, summer produce harvest, scallops, seal pups at the waterfall, lambs and photography.
- Anchors of Understanding that help contextualise the seasons for Chinese FIT visitors are:
  - Temperature °C
  - Layers of clothing
  - Sun rise and sun set times (photography and driving)
  - Day and night
  - Imagery – in winter showing green grass (not just mountain snow), people outdoors
  - Comparative photo collection – GPS location.
- Chinese want to know what they can do and experience when they are thinking of coming – what is good at that time:
  - Where is good to go
  - What is good to do
  - What is the experience like
  - What would be enjoyable.



# Taupo

February



Highlighting experiences at different times of the year enables clear understanding of what is available and great experiences. Currently, visitor generated itineraries are done this well. There is an opportunity for this to be further generated from New Zealand to better steer understandings of options and build reputation.

August



# SEASONAL ACTIVATION – RTO WEBSITES TEMPLATE



## SUMMER

- Use appealing relevant visuals
- Iconic photographs
- Great experience options
  - Activities
  - Specific to season
  - All year round

Upcoming events /festivals

Average temperature – day high and low

Layers of clothing required

## AUTUMN

- Use appealing relevant visuals
- Iconic photographs
- Great experience options
  - Activities
  - Specific to season
  - All year round

Upcoming events /festivals

Average temperature – day high and low

Layers of clothing required

## WINTER

- Use appealing relevant visuals
- Iconic photographs
- Great experience options
  - Activities
  - Specific to season
  - All year round

Upcoming events /festivals

Average temperature – day high and low

Layers of clothing required

## SPRING

- Use appealing relevant visuals
- Iconic photographs
- Great experience options
  - Activities
  - Specific to season
  - All year round

Upcoming events /festivals

Average temperature – day high and low

Layers of clothing required



# NEW ZEALAND SHOULDER

Spring and Autumn in New Zealand's temperate climate is very attractive for the Chinese. The natural beauty that is only available at these times is appealing. The Chinese love color. It is an extraordinary and unusual world view. This is not seen much in China and they do not have a history of accessible rural gardens, or extensive city gardens with colorful leaves.





**FORWARD**

# REGIONAL DEVELOPMENT



# REGIONAL DISPERSAL & THE PLANNING PHASE



## First time travellers

Their initial planning is based around what's popular and what's a "Must Do".

- They seek to include experiences in their itineraries that are "must dos" (popular).
- They want to "tick boxes" and enjoy experiences that are unique and different and will give them bragging rights.
- They want to gain an overview and initial understanding – "*What is New Zealand like and what would I like to see and do next time I return?*"

## Longer trips & subsequent trips to NZ

- "*Which interests and experiences can I get and where from?*"
- They look for deeper immersion and will go into regions and do more for longer.
- To be considered for inclusion in their itineraries, you need a reputation and to be recognised for what you offer.
- Icon experiences draw them in, and if there are other tourist services and experiences that can build on this, then there is mutual benefit.

It's about the **WHY**, not the **what** - in the context of people, culture, landscapes = experience

- They are looking for stories to share.
- They seek levels of serendipity – unexpected experiences that delight.



# REGIONAL VISITATION

## Travel planning is very different on the first and subsequent trips

On their first trip, Chinese visitors are generally coming to see New Zealand.

1<sup>st</sup> trip: need = overview and familiarisation – key main sights.

### FIRST VISIT



- They either go to the most popular "must do" sites

- Or realise you can't do it all and pick an island – or region, and focus on this

### Implication =

- Most first time visitors have similar places and experiences on their itineraries.
- There is also an awareness that this is the case and there is a desire to get away from the Chinese crowds in the main places.  
*"I don't want to go and see the same people as in China".*

### Opportunity =

- Promote less discovered treasures – that still reflect the dramatic intensity of natural New Zealand landscapes.
- Develop the reputation of new Icons – landscapes and experiences

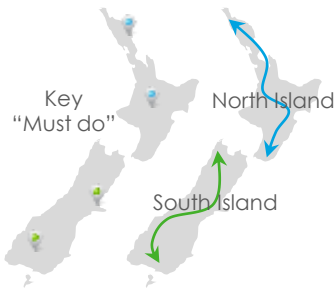


# REGIONAL VISITATION

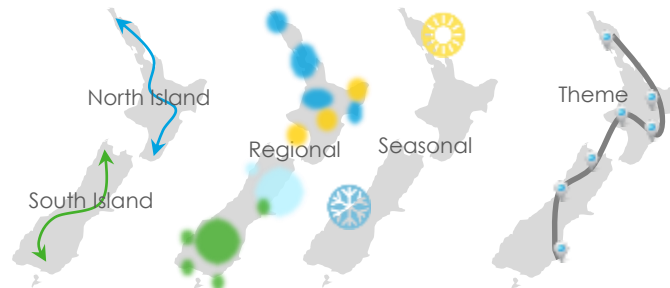
Travel planning is very different on the first and subsequent trips.

2<sup>nd</sup> + trip: need = In depth, special interest, exploration, discovery time to explore and experience.

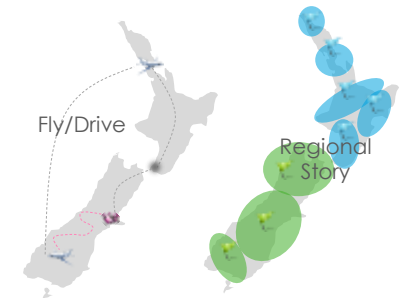
## FIRST VISIT



## SECOND VISIT



## OPPORTUNITY



- Overview to get a feel for the most popular experiences
- Or focus on one area - North or South Island

Travel and experiences in New Zealand are new. Tend to stay for a short time in each place, limited time available. The first trip is to discover how to see and experience New Zealand. For the second trip – they will seek knowledge about what to focus on in more depth, what to spend more time on.

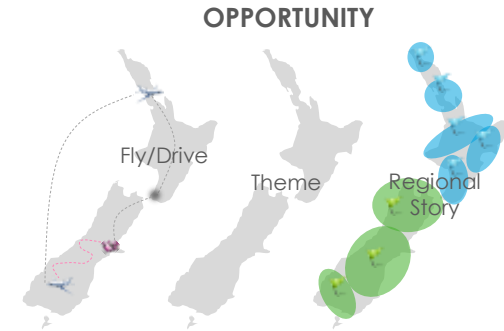
FORWARD

- In depth exploration - with a focus
- Complete what missed out on first time
- Come at a different season

On subsequent visits there is planning to come back for longer, with others who haven't been, to places they didn't get to the first time, to activities missed out on, to places more off the beaten track, to follow special interests, to spend longer really immersing in New Zealand and have a chance to explore and experience what it is like to live like the locals.

- Special interest localised and personalised experiences
- Following regionally differentiated itineraries/experiences
- There is opportunity to further build linked regional theme experiences – a number of regions together or an experience focus throughout the country – e.g. walking/hiking. These differentiating different experiences that can be had within New Zealand are attractive. *"I missed out – so will have to come back"*. Regionally linked experiences create a differentiated experience promise with a strong reason to visit and explore an area.
- Fly drive gives ease of access to very different experiences on one trip. There is an opportunity to explain the ease and short time these trips take.

# REGIONAL DEVELOPMENT



**TARGET SPECIFIC TRAVELLERS to develop strong regional growth**

Experienced, sophisticated, more confident  
 Second time visitors  
 Longer stay  
 Immersion adventure

**PREMIUM and EXTENSION EXPERIENCES**

Curated – personalised and carefully crafted:

- Hunting
- Golf
- Guided treks
- Boating
- Horse treks

**THEME**

Family  
 Photography  
 Gardens  
 Golf  
 Food/Gourmet (wine, seafood)  
 Animals/wildlife  
 Walking  
 Trekking/hiking  
 Adventure  
 Bike/cycling



# BUILDING REGIONAL DISPERSAL PATHWAYS TO DEVELOPMENT



Collaborate and unite the 4 channels for building regional dispersal

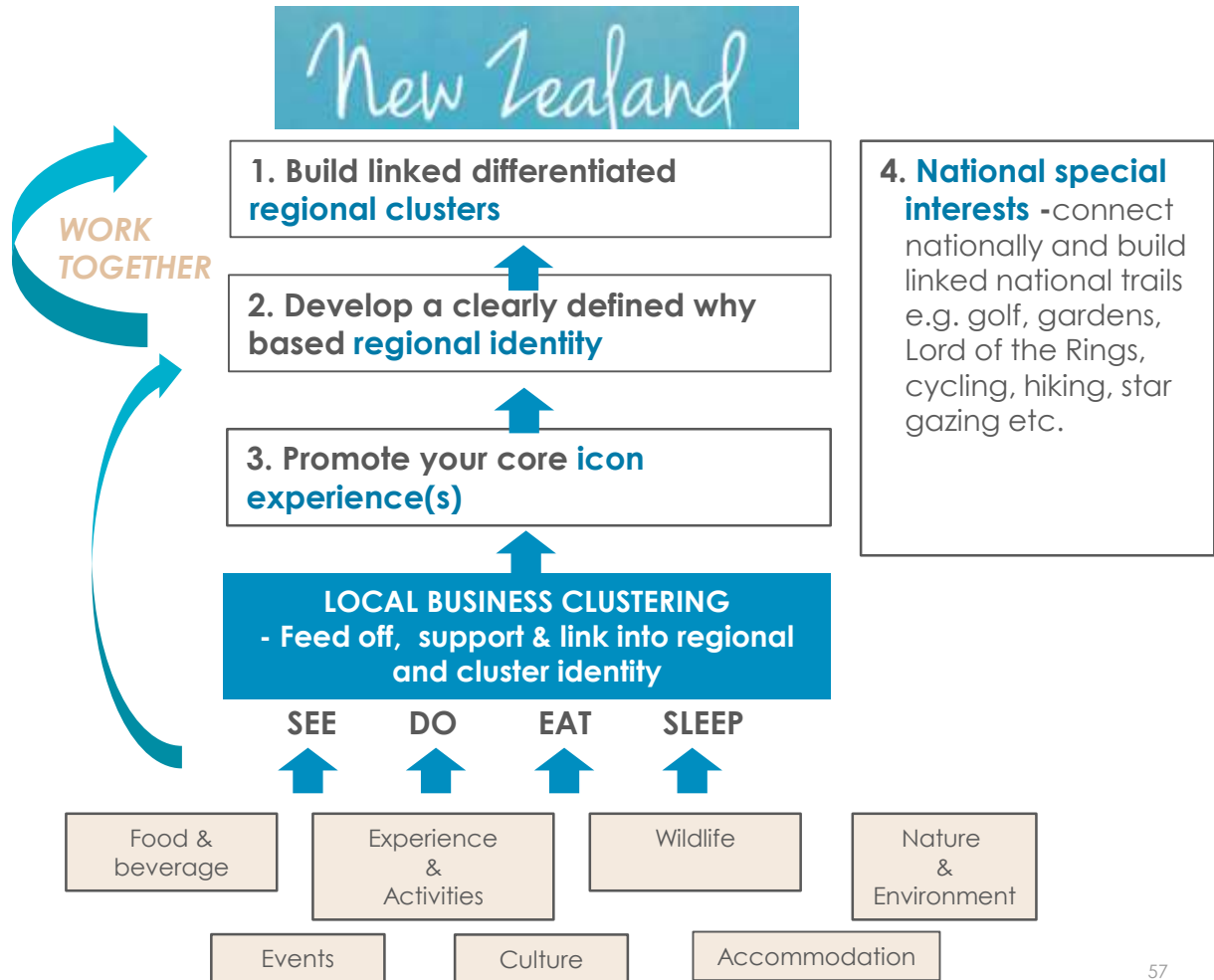
**Target:**

- Repeat visitors
- Longer stay visitors
- Families

**Build:**

- Unique stories around existing product & experiences
- Icon experiences
  - Around what we have
  - New Products

**Support:**  
the “everything close” proposition





# REGIONAL DEVELOPMENT

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Chinese travellers tend to follow **Key Opinion Leaders** e.g.: celebrities or experts in special interest activities and word of mouth. It is acknowledged that New Zealand is a country with a great many things to experience and do, and you can't do it all at once. However, currently there is still a well trodden path of popularity with little deviation off the well trodden path.

- There is an opportunity to utilise key opinion leaders to build reputation in less well known regional areas and with less well known experiences.
- It is important to ensure the opinion leaders are credible, aspirational and targeted at the appropriate (high value) target market.

There is a real desire to go **beyond the beaten track** (and some "off the beaten track") and to move away from popular Chinese tourism areas. *"We want to get away – we don't want to go on holiday and be surrounded with other Chinese"*.

- Relatively small (or ordinary to our minds) experiences can become compelling. 'Must do' experiences within a region could be e.g.: star gazing / lupin photos or dawn chorus (bird songs) / rhododendron photos.
- Collaboration and cluster development, under a regional proposition and combined regional umbrella, are important to build a sense of identity and reputation.



# REGIONAL DEVELOPMENT

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→ **Targeting** is important to optimise investment in regional development. Different types of Chinese visitors have more propensity to visit emergent “off the beaten track” experiences.

There is a strong intention for **repeat visitation** to New Zealand.

→ Second time return visitors are a primary target. They intend to get more immersed and take more time in areas they are interested in “off the beaten track”.

**Special interest** national themes also have potential to support the growth of regional tourism. While these are of niche appeal, they are of strong interest to those involved.

→ Targeted development focussed on golf, cycling, walking / trekking, wildlife, gardens, photography, wine and food.



# REGIONAL DEVELOPMENT

## ISSUES



### **There is a regional blank for many beyond the main tourist areas**

- Limited:
  - Knowledge
  - Awareness
  - Confidence
  - Reputation.
- Unclear differentiation and uniqueness:
  - Following – must do popular experiences.
  - No clear “reason” to go beyond the most popular areas.
  - Functional descriptions and activities do not give strong experiential compelling reasons to visit:
  - There are plenty of great options to fill an itinerary from the most popular areas – when other areas are not clearly differentiated or defined in terms of experience there is no reason to deviate in planning to less familiar places.
  - Without a clear proposition and experience promise, they are not willing to take a risk. It is a group experience and the planner is responsible for the group. This exacerbates the risk in choosing less familiar options.

### **Awareness and desire – Chinese website and media driven**

- Popularity is limited to most popular areas and experiences.
- We must build experiences, then sharing and recommendations.
- Key Opinion Leaders (KOL) - sharing online and in media are good ways to start to build reputation.

# REGIONAL



To build increased regional visitation we need to build:

The unique proposition

## What and Why

|                            |                                 |   |
|----------------------------|---------------------------------|---|
| The unique special "story" | The stand out "icon experience" | The supporting experiences<br>Eat, play, sleep, relax, discover |
|----------------------------|---------------------------------|---|

Awareness  
Confidence

## Who

|   |   |  |
|---|---|--|
| <p><b>Target</b><br/>– Who will be attracted to this and why</p> <p><b>Build targeted networks in China and drive visitation</b><br/>by Key Opinion Leaders (KOL), with an interest e.g. golf clubs, tramping groups, photography groups, wild life groups, ski, food</p> | <p><b>Build sharing</b><br/>With clearly identified New Zealand brand/region</p> <p>"must do"<br/>Social credence and share ability</p> | <p><b>Build momentum</b><br/>Appear in many places<br/>Different social media platforms, New Zealand websites, travel guides, TV and travel programmes, airline magazines...</p> |
|---|---|--|

Structure

## How

|   |  |  |
|---|--|--|
| <p><b>Linkages</b><br/>Form entry and exit points from other regions/places</p> | <p><b>Regionally focused itineraries</b><br/>With special interest options, time options, activities</p> | <p><b>Time options and alternatives</b><br/>Discover vs. explore</p> |
|---|--|--|



# REGIONAL DEVELOPMENT

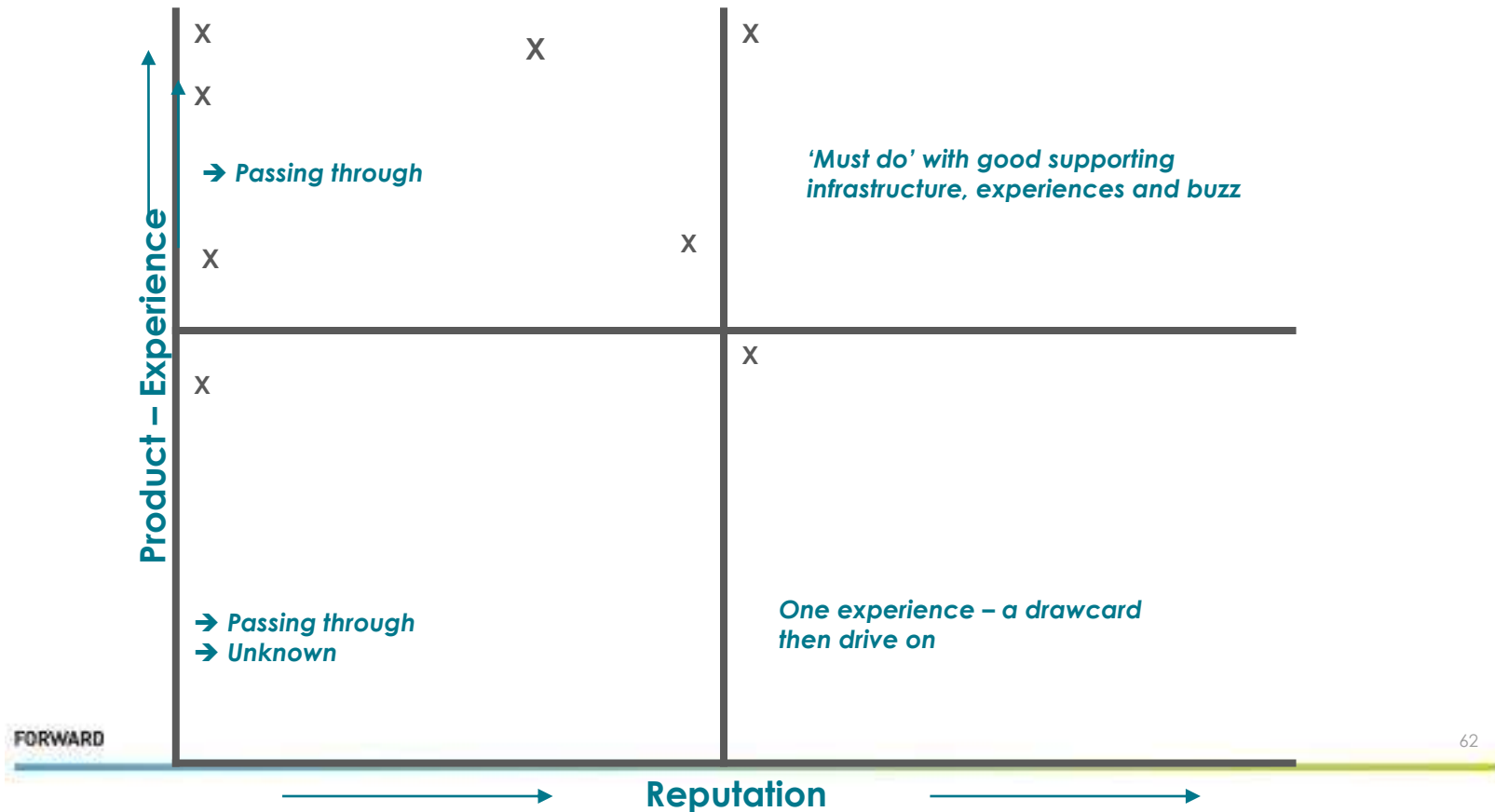
Chinese visitors are attracted by:

**REPUTATION** – seen, known and recommended – a unique “must do”, something noticeable/desirable.

**EXPERIENCE** – An icon(want to do)and support experiences and activities. Things to get involved with.

To build a sustained tourism platform we need reputation and product – with supporting infrastructure (accommodation, transport, food).

The diagram below illustrates different perceptions and challenges

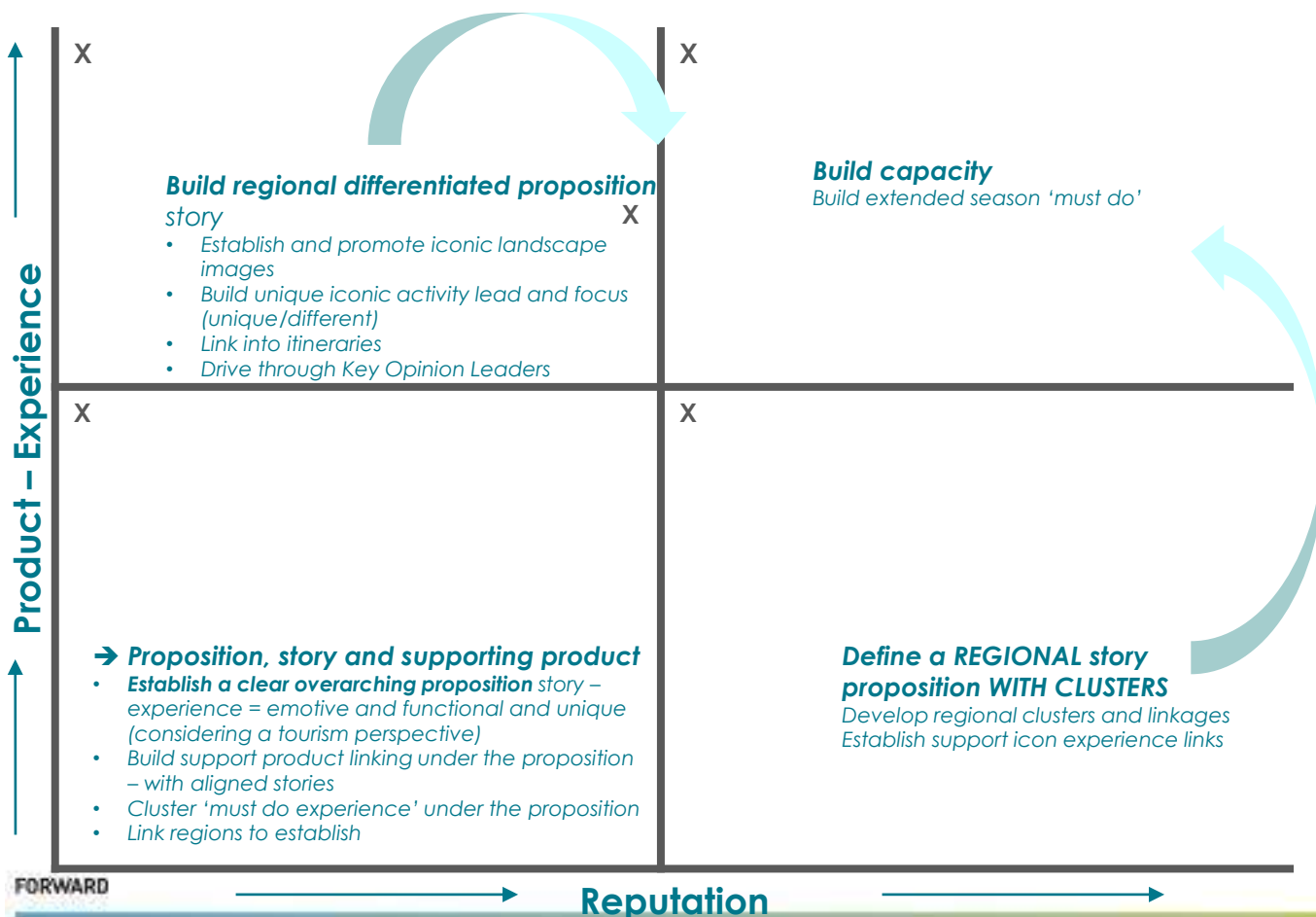




# REGIONAL DEVELOPMENT OPPORTUNITY

Depending on the tourism development status of a region, a specific development strategy and focus will be needed to optimise value growth.

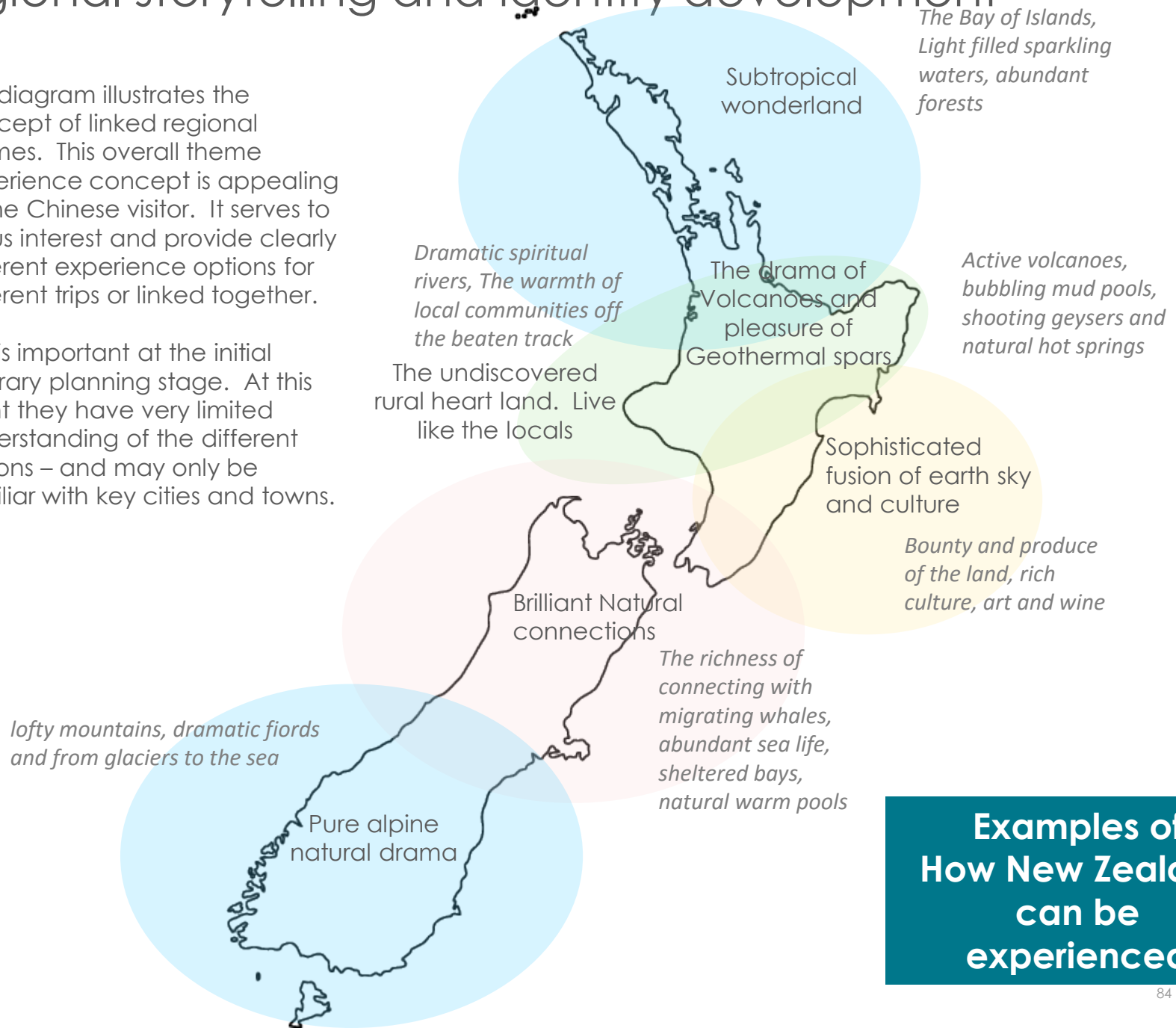
The following diagram provides an example of potential development strategy options.



# Regional storytelling and identity development

This diagram illustrates the concept of linked regional themes. This overall theme experience concept is appealing to the Chinese visitor. It serves to focus interest and provide clearly different experience options for different trips or linked together.

This is important at the initial itinerary planning stage. At this point they have very limited understanding of the different regions – and may only be familiar with key cities and towns.



**Examples of  
How New Zealand  
can be  
experienced**



Icon imagery reflecting the distinctive regional offering is important. These images are illustrative only.

There is an opportunity to develop clearly differentiated icons and promote them consistently for the developing regions.

The differentiated context and story around an experience is important.



## The look of New Zealand

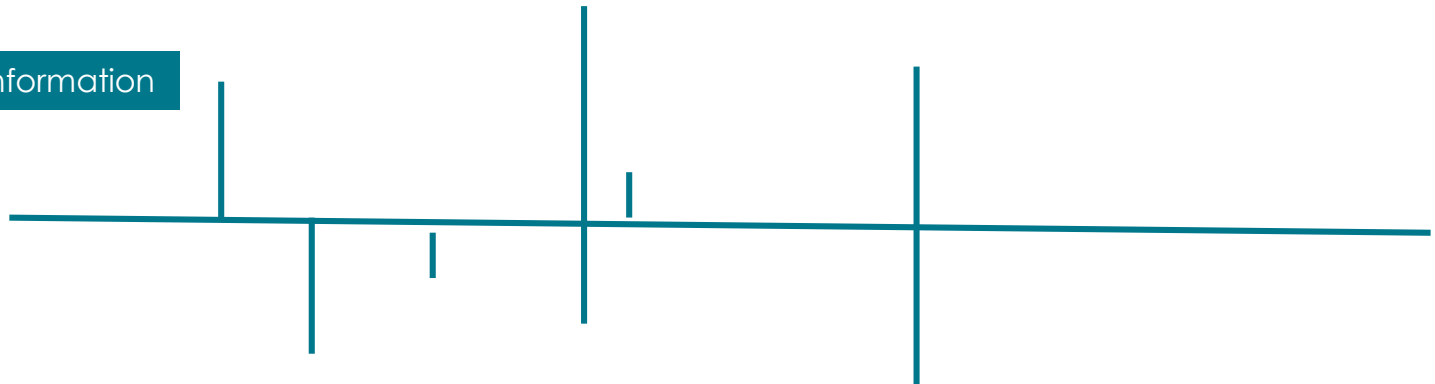


# VISUAL ITINERARY PLANNING TOOLS

Inspiration and visualisation



Facts and information



Personalised itinerary planning guidance – search engine

Length

Time of year/dates

interests

Must do activities

Food

Style of accommodation

Itinerary planning tools will help Chinese include new experiences and regions. Sometimes this is currently missing, or could be substantially improved.

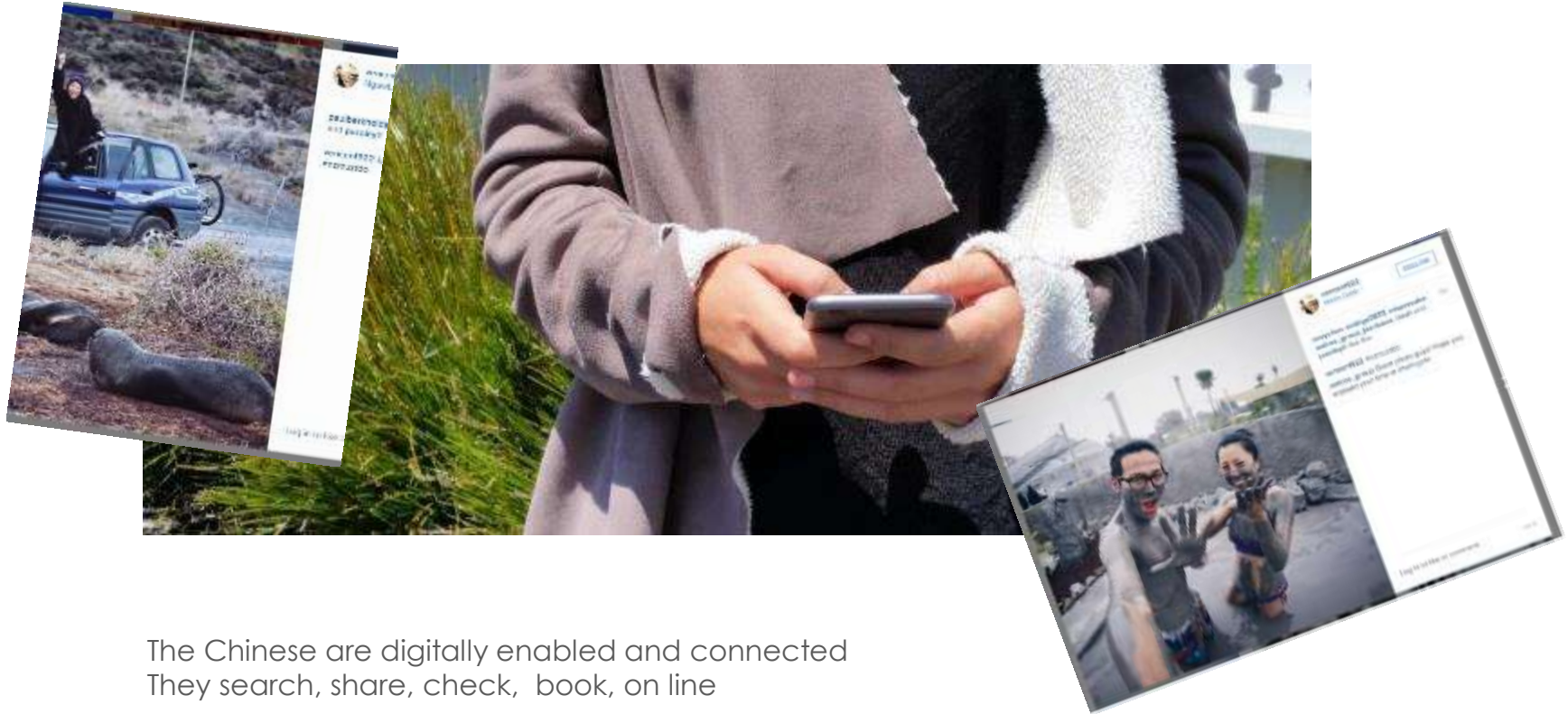


FORWARD

# DIGITAL AND SOCIAL MEDIA CONNECTION



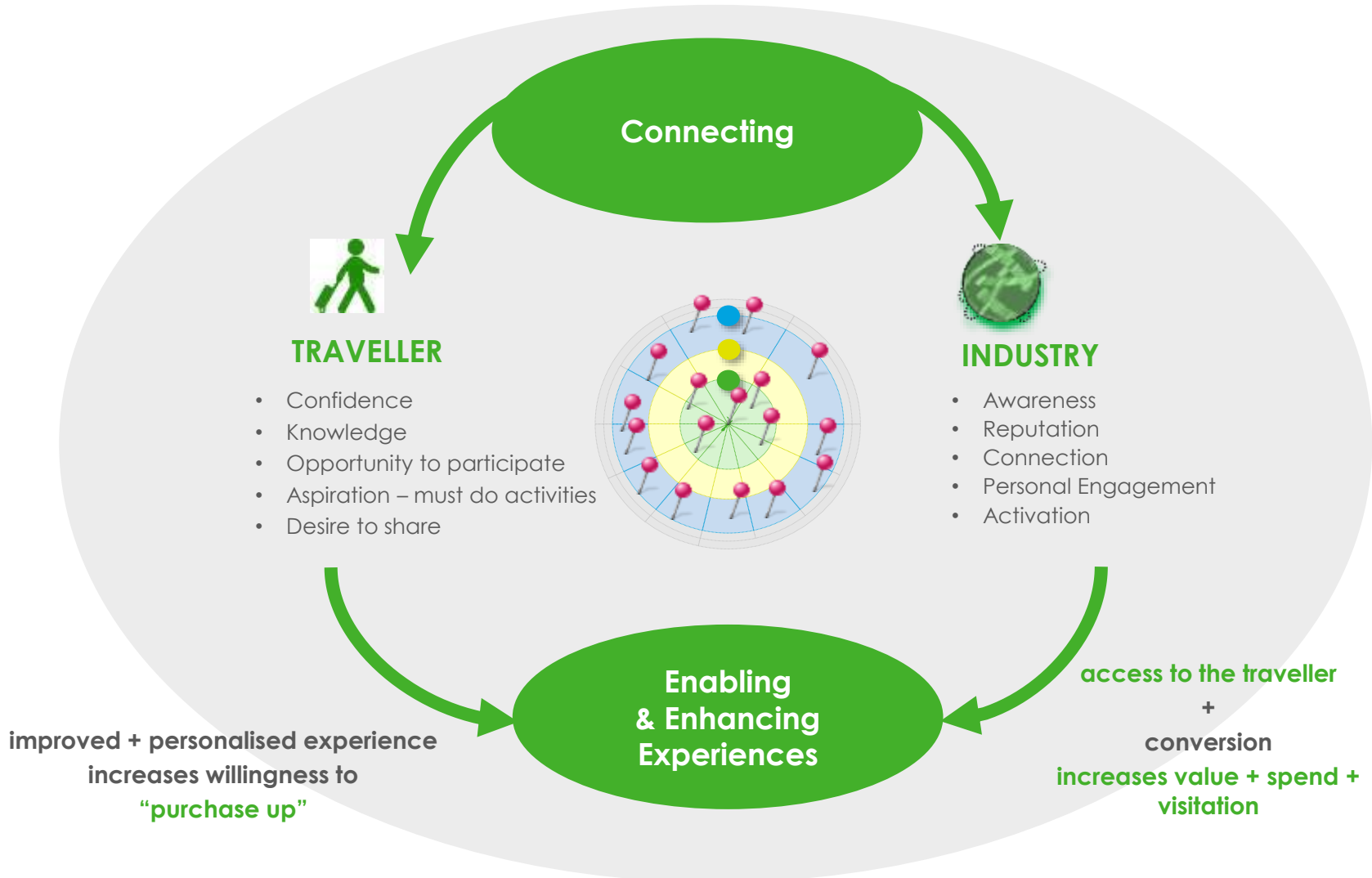
# DIGITAL IS A SIGNIFICANT VALUE BUILD OPPOTUNITY



The Chinese are digitally enabled and connected  
They search, share, check, book, on line

The ability to influence awareness, understanding and connection through digital and social media amongst the Chinese is significant

# DIGITAL DELIVERS VALUE FOR ALL

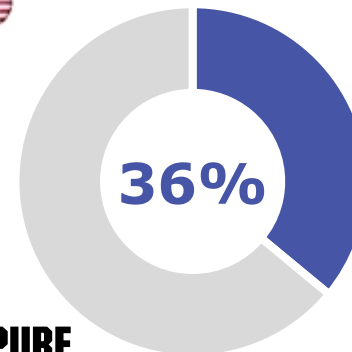
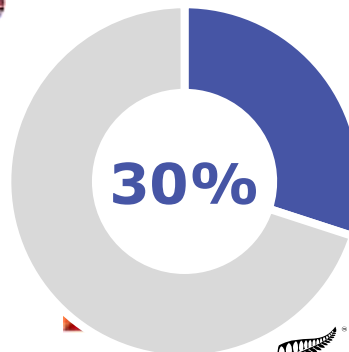
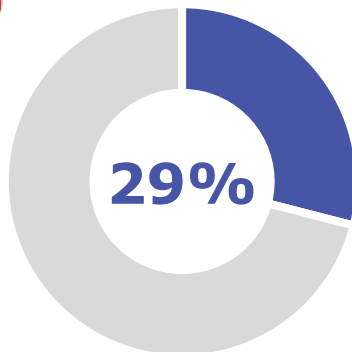
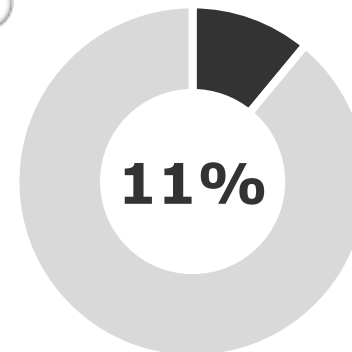
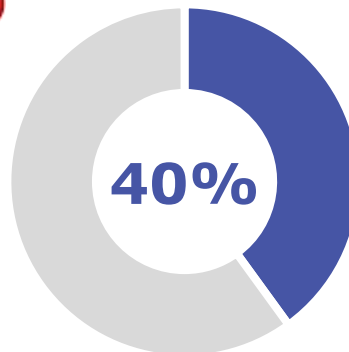
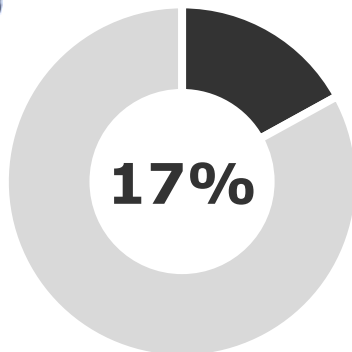


# THEY SPEND A LOT OF TIME RESEARCHING



40% OF CHINESE ACTIVE CONSIDERERS THINK THEY WILL NEED TO RESEARCH COMING TO NEW ZEALAND DIFFERENTLY COMPARED TO WHAT THEY WOULD USUALLY DO

Question: "Thinking about organising a New Zealand holiday, I think I would need to do things a bit differently to how I'd usually do them"



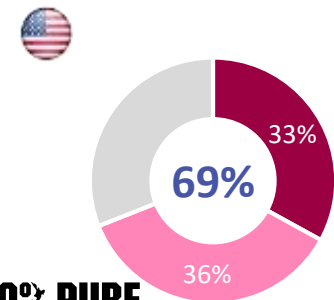
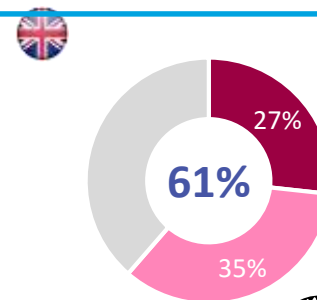
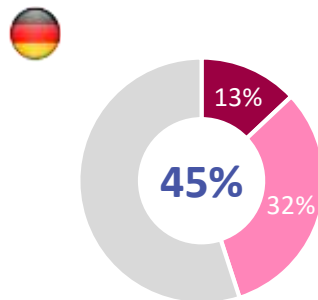
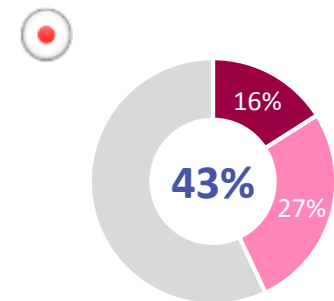
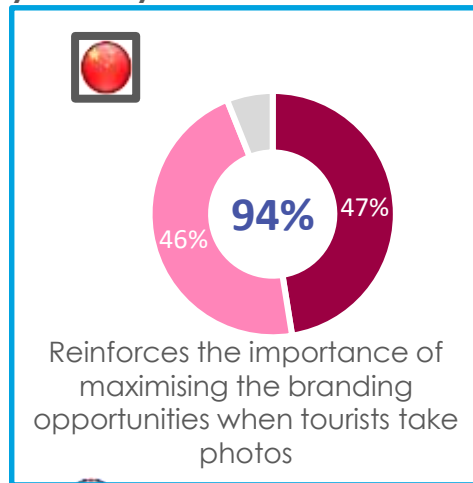
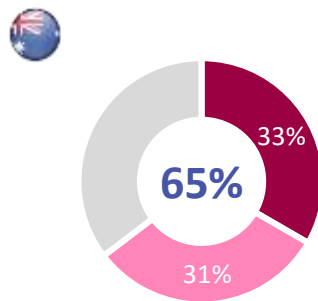
# SOCIAL POSTING

## BY COUNTRY



CHINESE TRAVELLERS ARE THE MOST PROLIFIC 'POSTERS' ON SOCIAL MEDIA, FOLLOWED BY THOSE FROM AUSTRALIA AND USA AND POSTING IS UNSURPRISINGLY MORE COMMON WITH YOUTH TRAVELLERS

- “When on holiday, I upload posts or photos about my holiday on social media ...” (ACs)





# DIGITAL - FAST FACTS

---

The Chinese are prolific users of digital online and social media. It is essential to Chinese social cohesion and organisation of their lives.

- **Chinese FIT search, explore, share and book online.**
- **They strongly follow word of mouth and Key Opinion Leader (KOL) recommendations.** This is an opportunity and a risk.
- **Ratings count** - culturally a four star review rating is the minimum expected rating standard. More ratings by more people reflect popularity and liking. They equate less ratings with dissatisfaction.
- **Gaining referrals and ratings is critical** – need for NZ business to drive reviews by encouraging, asking and/or incentivising.
- **They are Positive** and rarely give a negative review (saving face).
- **Complex noisy competitive digital marketplace** with rapidly shifting and evolving digital platforms.
  - **WeChat** was the most active social platform with monthly average users of 556.48 million
  - **Baidu App** was the most active mobile search engine with monthly average users of 190.03 million in July 2015
  - **Weibo** Largest microblogging site with monthly average users of 212 million for June 2015
  - **iQIYI** and **Youku** lead the mobile video market



# DIGITAL – FAST FACTS



- **Digital connection is the link to language for Chinese visitors.** They are able to get information, instruction and translation. They rely on it to enable them to travel as FIT relatively easily.
  - They use digital to share. It is relevant for all ages, attitudes and targets.
- **Translated information is critical** to support connection, value and understanding.
- **Geolocation is very important for security and navigation.**
  - Provide precise GPS co-ordinates in addition to addresses to enable navigation.
  - Consider mobile coverage needs in areas with most Chinese visitors → safety, security, sharing, location.
- **Access to Wi-Fi (free) enables sharing** Wi-Fi on site is used for immediate posting and sharing, preferably before they even return to their hotels.
  - We must build access to free Wi-Fi; to support sharing and social media in isolated locations.
  - Opportunity to promote NZ Wi-Fi bundles on arrival for a set period (Wi-Fi stick).
- **Chinese Digital infrastructure is key.**
  - In China they do not have access to Google, Facebook and YouTube as they are blocked.
  - Opportunity to engage and build presence on Chinese websites, search engines and social media.
  - All tourism businesses targeting Chinese visitors would strongly benefit from a digital development strategy.
- **QR codes are widely used and adopted.**
  - QR<sup>1</sup> codes are used as short cuts to specific information and connection with businesses and services.
  - QR codes<sup>1</sup> are a mechanism which will increase engagement and facilitate sharing of your contact details to others.

<sup>1</sup>A QR Code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone.

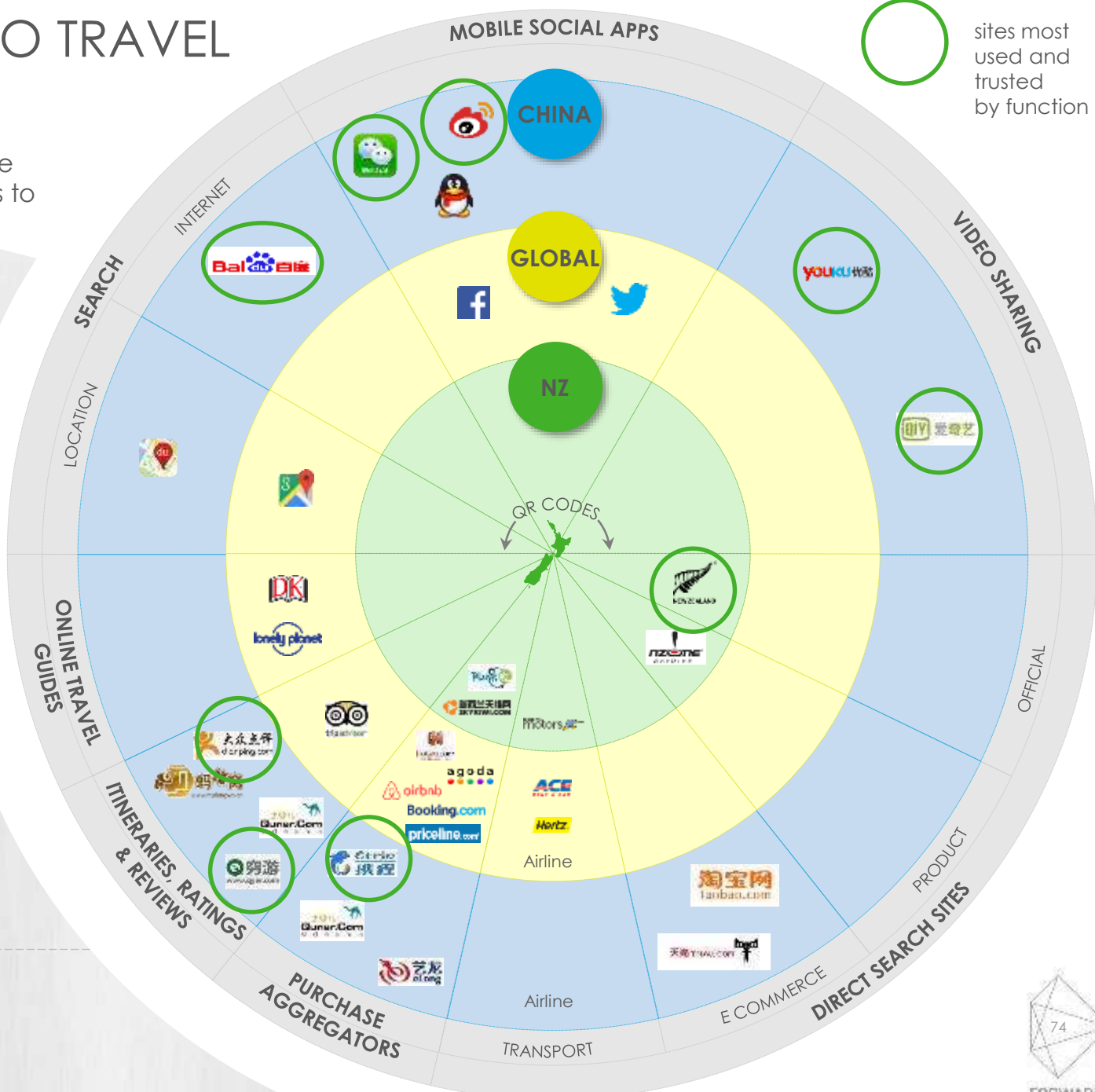
# THE JOURNEY TO TRAVEL

## DIGITAL

○ sites most used and trusted by function

Throughout the journey Chinese are using a wide variety of sites to achieve their travel ambitions

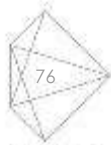
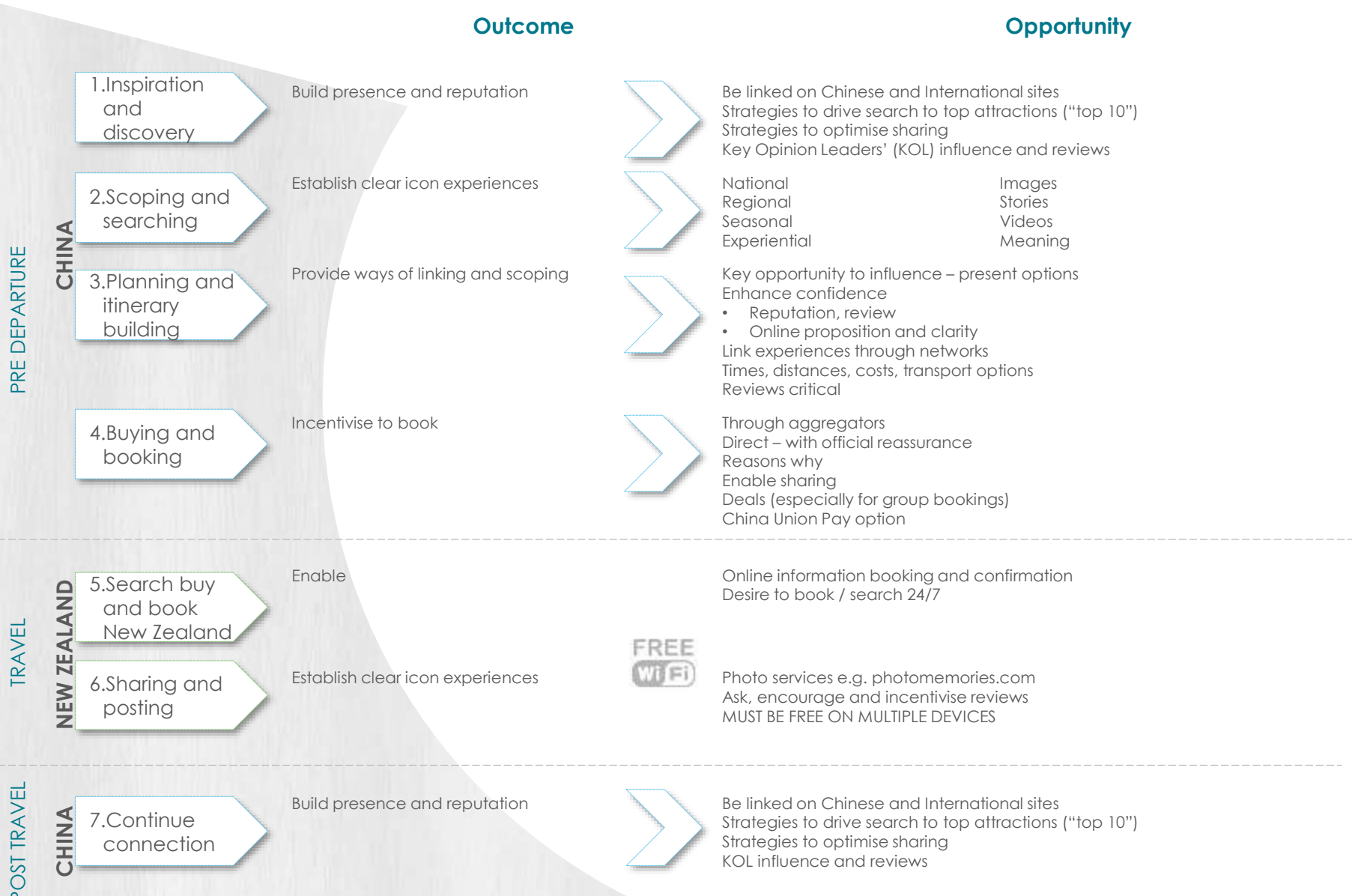
- Pre departure**
- CHINA
    1. Inspiration and discovery
    2. Scoping and searching
    3. Planning and itinerary building
    4. Buying and booking
  - NEW ZEALAND
    5. Search buy and book New Zealand
    6. Sharing and posting
  - CHINA
    7. Continue connection



# THE DIGITAL TRAVEL EXPERIENCE PLATFORMS AND WEBSITES

|               |             | Platforms                          | Websites visited                     |   |   |   |   |
|---------------|-------------|------------------------------------|--------------------------------------|---|---|---|---|
|               |             |                                    | China                                | International   | New Zealand   |   |   |
| PRE DEPARTURE | CHINA       | 1. Inspiration and discovery       | Build a wish list                    | Apps<br>Online travel aggregations<br>Airlines<br>Advertisements                            | WeChat<br>QuNar<br>C-Trip<br>E-Long<br>Baidu / Weibo                              | Booking.com<br>Hotels.com   | Air New Zealand<br>NewZealand.com   |
|               |             | 2. Scoping and searching           | Create a plan: Group, time, focus    | Search Engines<br>Official Tourism site<br>New Zealand immigration site                     | Baidu<br>WeChat<br>Weibo, Qiongyou,<br>Mafengwo, Qunar                            |   | NewZealand.com<br>Immigration.govt.nz   |
|               |             | 3. Planning and itinerary build    | Create a specific tailored itinerary | Apps<br>Online travel guides with itineraries<br>Video sharing sites                        | WeChat, Weibo,<br>QiongYou,<br>Mafengwo, Qunar,<br>C-Trip, E-Long,<br>Youku, iQiy | Lonely Planet<br>Trip Advisor   | NewZealand.com<br>Immigration.govt.nz<br>Various New Zealand operators – recommended on digital sites – links |
|               |             | 4. Buying and booking              | Book & Buy                           | Online travel aggregators<br>• Accommodation, rental car, icon must do activities<br>• Apps | C-Trip, Quivar, E-Long, WeChat  | Priceline.com (car rentals)<br>Booking.com<br>Hotels.com<br>Agoda.com | Ace Rentals<br>Hertz  |
| TRAVEL        | NEW ZEALAND | 5. Search buy and book New Zealand | Respond to immediate opportunity     | Individual operators of icon activities<br>New Zealand discount sites                       | WeChat  | Google<br>Google Maps<br>Trip advisor<br>Yelp                         | Individual retailers e.g.<br>Triology<br>Skykiwi<br>Facebook sites<br>Backpackersdeals.com<br>Bookme.co.nz    |
|               |             | 6. Sharing and posting             | Share                                | Apps - Websites   | WeChat<br>Mafengwo<br>QiongYou<br>Dazhongdianping                                 |   |   |
| POST TRAVEL   | CHINA       | 7. Continue connection             | Share and enable others              | Curated information – High value informative comments<br>Photo shopped photos               | Qunar<br>C-Trip<br>WeChat<br>Mafengwo<br>QiongYou<br>Weibo                        |   | New Zealand individual operators  |

# THE DIGITAL TRAVEL EXPERIENCE OPPORTUNITIES FOR NEW ZEALAND BUSINESSES



# THE DIGITAL TRAVEL EXPERIENCE OPPORTUNITY BY SECTOR SCALE

PRE DEPARTURE

## BUILD REPUTATION - Presence

### Small Operator

### Large Operator

### Regions

### New Zealand

1. Inspiration and discovery

Build a wish list

Ensure you can be recognised as the official site  
Build an icon story + material - STORIES  
Mobile optimised

Key Opinion Leader  
Inspiring  
Icon engagement  
Differentiation

Key Opinion Leader  
National, regional, seasonal, icon promotions

2. Scoping and searching

Create a plan: group, time, focus

Respond to requests (google translate or local network)  
Monitor and respond to user generated reviews

Create links and connections  
Build confidence and desire (reviews and recommendations)  
Indicate budget and time options  
Itinerary building platform

Ensure linked into New Zealand networks

- Regional itineraries
- National themes (associated product)
- Local clusters
- i-SITE

Logistic and details  
Time option choices  
Build links and opportunity around  
Manage time expectations and needs

3. Planning and itinerary build

Create a specific tailored itinerary

Ensure a presence on (minimum) global review sites e.g. Trip Advisor

4. Buying and booking

Book & buy

Show Wi-Fi connectivity  
Clarify booking and cancellation policy

Deals offers – linked  
Confirmation and feedback  
Helpful tips and ideas  
Trade ups

Online enabled and direct booking and payment options  
Travel tips, links into aligned clusters  
Link to i-SITE

TRAVEL

## ENABLE SHARING – Experiences

5. Search buy and book New Zealand

Respond to immediate opportunity

Must get Chinese visitors and encourage sharing  
Free Wi-Fi  
QR-Code – download your info to their account  
High brand visibility  
Highlight photo opportunities/apps?  
Incentivise to share – e.g. free coffee, one free ride, free taste  
Request to share  
Send new news  
Send deals for friend  
Downloadable photo and video content  
Ongoing communication and promotion

6. Sharing and posting

Share

POST TRAVEL

7. Continue connection

Share and enable others

NEW ZEALAND

CHINA

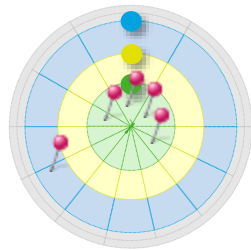


# DIGITAL – A PHASED APPROACH



*Building and staying connected*

## 1. BE FOUND, BUILD CONNECTIONS & REFERRALS

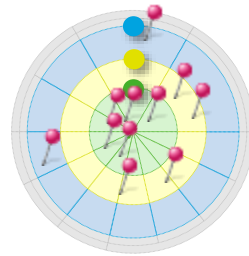


### WHAT YOU NEED TO DO

- **Be found online.**
- At minimum have a strong presence on NZ sites.
- Actively **focus on sharing and client referrals** through Chinese travellers.
- Make every effort to get your site shared on Chinese social media and travel aggregators.
- **Enable and support sharing** - quality branded photos - link to site - VIP- free Wifi - Use QR codes - GPS location.
- **Personal focused approach.**
- Shareable opportunities.
- Actively link Chinese travellers to your network to enhance experience.
- Set up photos and help share.
- Incentivise to share.



## 2. CHINESE FOCUSED DIGITAL STRATEGY

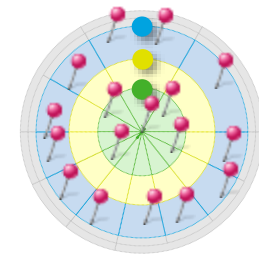


### WHAT YOU NEED TO DO

- **Leverage market insights** – Chinese holidays and experience preferences to develop strong seasonal value .
- Consider simplified Chinese translated website.
- Build presence on non-Chinese social media sites – Twitter, Instagram, Facebook and travel aggregators.
- **Consider Weibo social media account** (Facebook lookalike).
- Personal WeChat account – NZ & China.
- Consider **development of Key Opinion Leader (KOL) Programme** to drive referrals and engagement.
- Pre-packaged media content – image rich leveraging KOL & uniqueness.



## 3. FULLY INTERATED CHINESE DIGITAL PROGRAM



### WHAT YOU NEED TO DO

- **Establish a robust Chinese digital strategy, social media and PR programme.**
- Consider having Chinese social media expertise responsibility in-house or in China.
- Consider WeChat Official Account (China based).
- Develop engaging content for blog sites, PR and social media.
- Build out community leveraging likes.
- Paid search - advertising or promotion.
- Monitor market and constantly monitor and refine channels and investment.
- Seamlessly integrate online and offline experiences.

# PULL TOGETHER THE BEST OF POSTINGS

## TO DRIVE INSPIRATION AND BUILD CREDIBILITY



Curating 'the best of' fan photos and re-sharing this back to followers is a good way to develop referrals and build sharing

People typically use social media to boast about their holiday experiences, but only a fraction of this content is inspirational or relevant. One way of making it more inspiring is to curate (consolidate the best) social media posts like Australia.com does.

Australia.com is doing this effectively by curating 'best of' fan photos and re-sharing this back to its followers:



# DIGITAL - PUTTING ONLINE AND OFFLINE TOGETHER



## 1. Understand your customer's journey

1. Inspiration and discovery

2. Scoping and searching

3. Planning and itinerary building

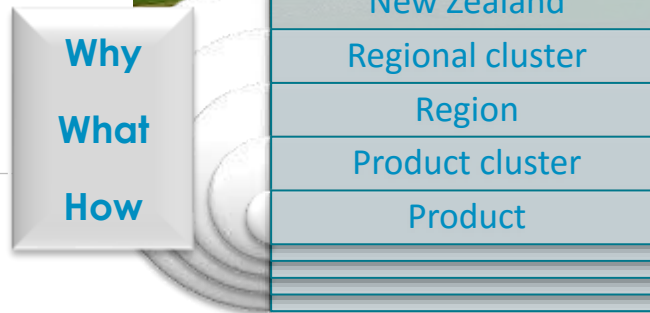
4. Buying and booking

5. Search buy and book New Zealand

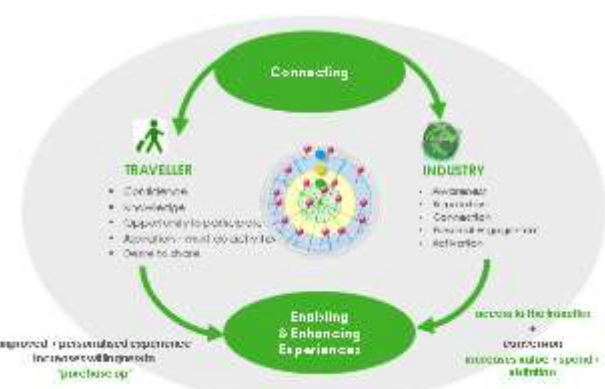
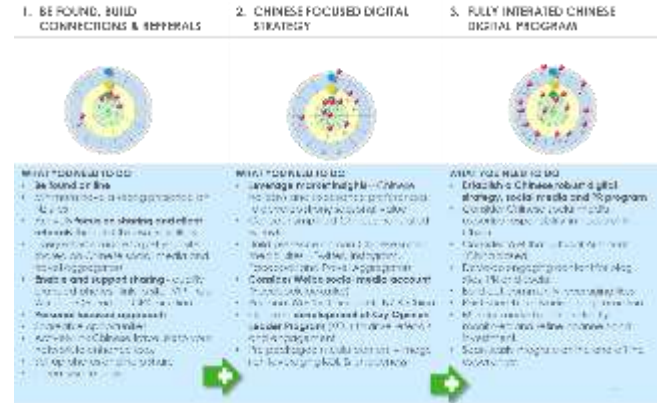
6. Sharing and posting

7. Continue connection

## 2. Build & develop your unique story and assets



## 3. Develop your digital plan to build value



Pre departure

CHINA

Travel

NEW ZEALAND

Post travel

CHINA

FORWARD

Where do you need to connect

What are you going to say

How do you do it

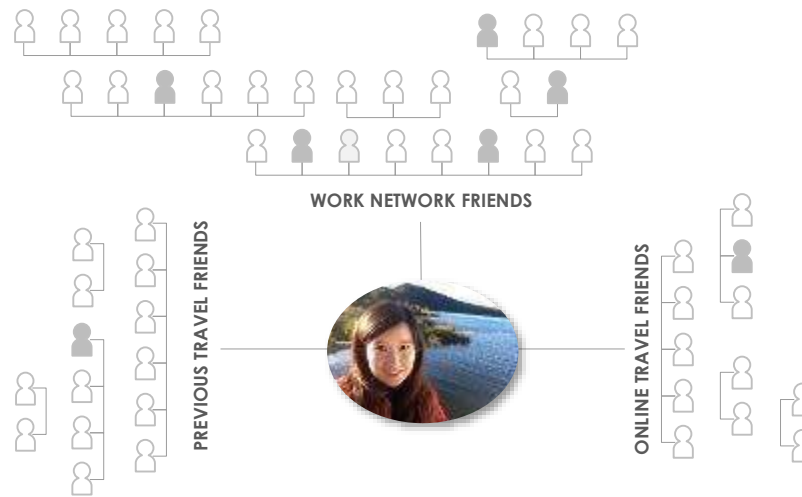




# ONE TRAVELLER IMPACTS MANY

User Generated Content is especially important in the China tourism market.

## TRAVEL FRIENDSHIP NETWORKING... IS EXTENSIVE AND INFLUENTIAL



**Friendship groups will regularly travel together** depending on who is available and interested, and may include:

- 12 core friends
- 20 who regularly travel together
- 60 in a loose network
- Friends of friends who may travel together
- People you haven't met but have a similar interest

**Friendship clusters may vary and include:**

- Friends with children of a similar age (family travel)
- Business association "friends"
- Special interest friends e.g. photography
- Friends linked through work

**Within a close travel group often responsibility is divided up:**

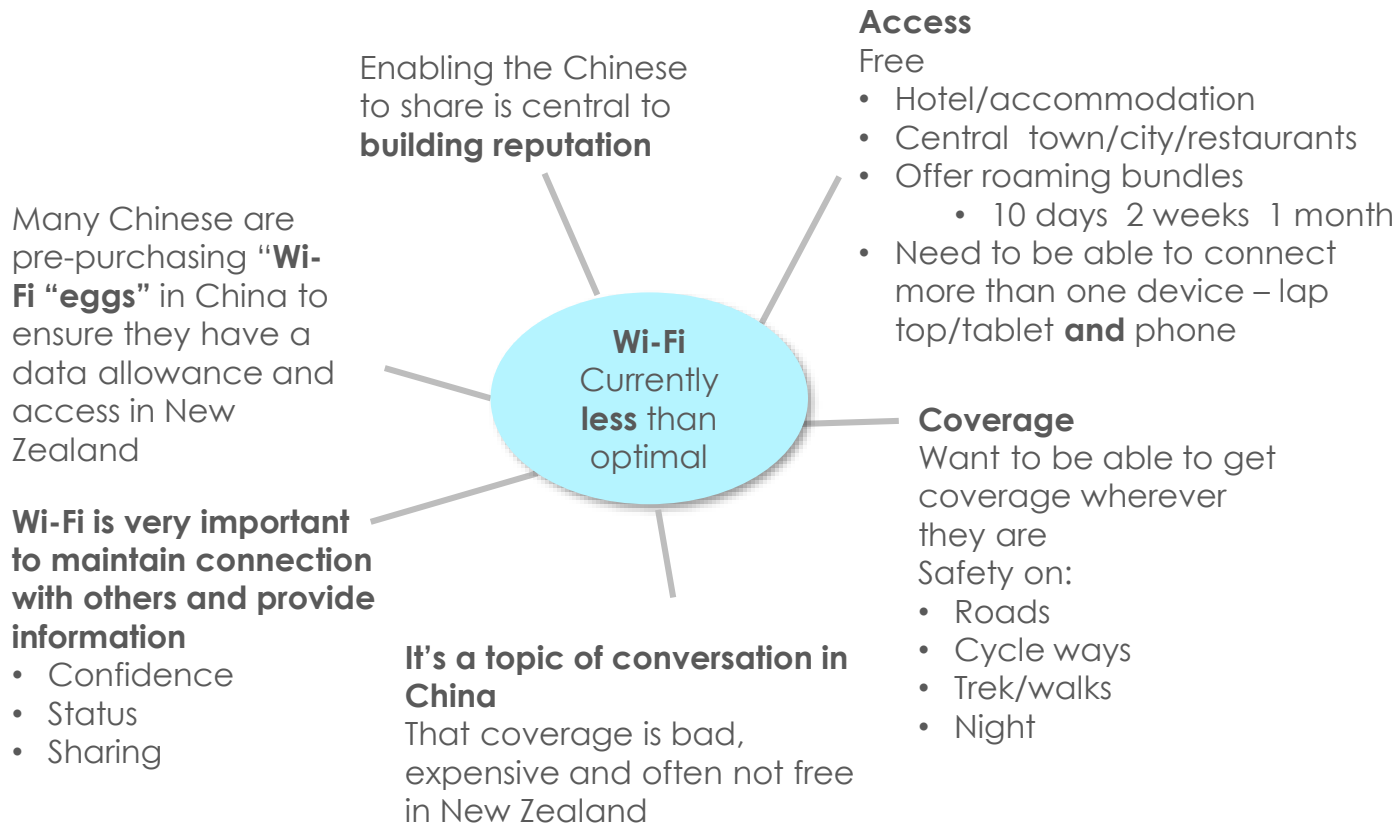
- Finding and booking flights/deals
- Drafting an itinerary
- Translation
- Visas and regulations
- Accommodation
- Transport/driving

- ➔
- Every traveller is a valuable potential advocate impacting many – we need to treat them as our ambassadors
  - Bad experiences will also travel fast
  - User experience is important to inspire and even more so to reinforce credibility of the experience.



# WI-FI

## SUPPORTING SHARING AND ENABLEMENT



China data bundles are very low – rely on free Wi-Fi.  
Will use data for geo location before sharing → when sharing is reduced, our ability to build reputation, confidence and desire is reduced.



# QR CODES

---



A QR Code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by a camera or smartphone.

The Chinese are extensively using QR Codes to verify products and link to web sites with information that they want easily.

Most advertising in China has a QR Code link enabling more information to be found immediately if desired.

A QR Code can also be used to immediately link location and business information to a photo that is posted on line.

Many restaurants are using QR Codes on small table top cards to enable diners to immediately access different language menus and images of dishes.

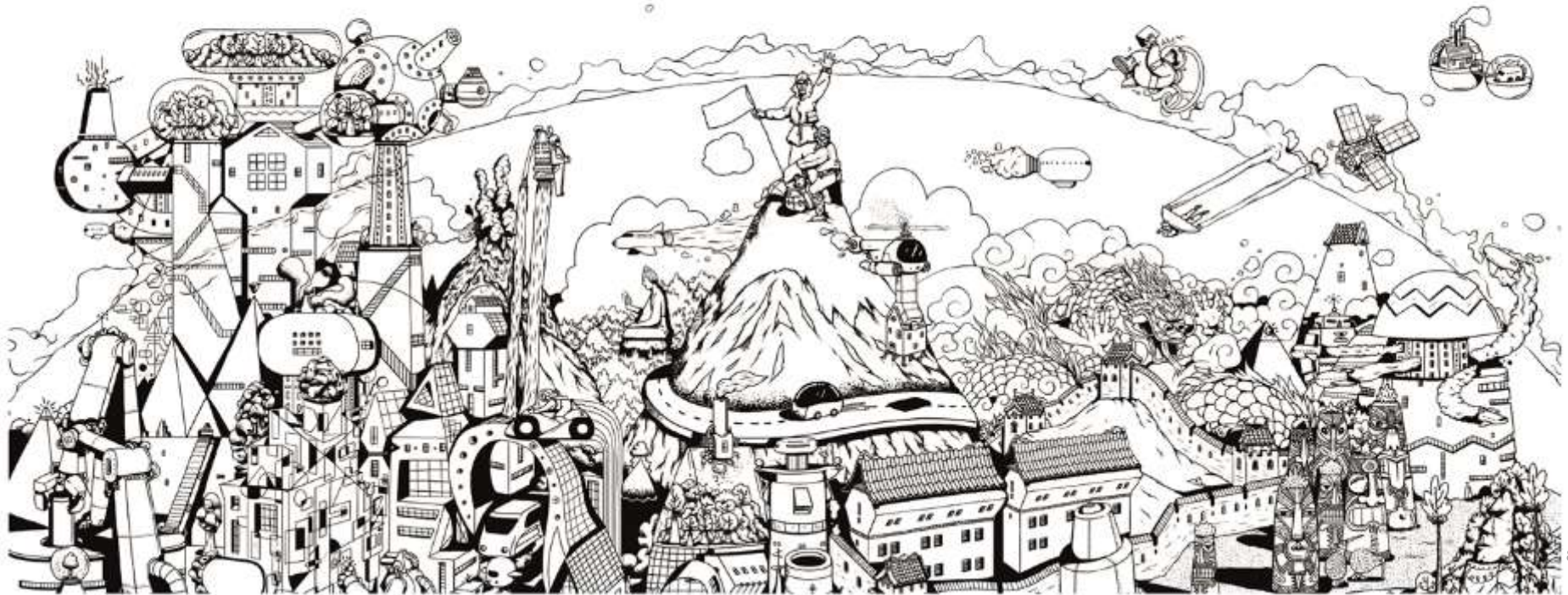
Users download a free app to their cell phones to enable them to read QR Codes e.g. <http://www.i-nigma.com/downloadi-nigma-reader.html> 

There are many free QR Code generator sites on the internet e.g.: <https://www.the-qr-code-generator.com/>



**FORWARD**

# PRODUCT DEVELOPMENT AND INNOVATION





**FORWARD**

# KEY ENABLERS FOR OPTIMISING THE CHINESE PRODUCT EXPERIENCE





# PRODUCT DEVELOPMENT – THE FAST CHECKLIST

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To deliver and effectively communicate new product development check you have mastered the Top 5 tips.

1. It's unique and special
2. It's visual and visceral – not wordy
3. It's highly social and set up for sharing
4. Focus on the experience that's immediately easy to understand.  
What will they experience?
5. Build some flexibility into it as to how they may choose to experience it

# HOW THEY TRAVEL IS DIFFERENT - A CLUSTER IS AN ETHOS NOT A NUMBER



Independent travellers travel in clusters. The cluster is everything

They are more accustomed to  
**communal sleeping arrangements**

They **socialise** together

They **play** together

They **eat** together

They **stay** together

The group will split up – but **no one** will be **left alone**

## ➔ We must understand clusters – and how to optimise their experience

- ➔ There need to be options so people can do different things together. Watching can be as rewarding as doing.
- ➔ There does tend to be a leader – the leader needs to feel prepared and confident to 'sell' the idea or experience to the rest of the group.
- ➔ We have to be flexible and make it work – e.g. eating together may mean shifting the cutlery to other rooms.
- ➔ If one person is not enjoying it, the trip will be cut short (no-one is left behind) – change if needed.
- ➔ Those that travel together play together. Socialising together can be noisy – and they don't want to annoy others – how can we facilitate this?
- ➔ Time management can be important – with groups of sometimes over 20. How do we facilitate this easily and ensure everyone enjoys the experience?



# BE CONFIDENT TO OUTLINE THE RULES WITH RESPECT

## *Chinese do not want to offend*

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- They have a social desire to not lose face and not offend. They do not want to embarrass themselves, their family or their country.
- They therefore spend time upfront prior to arriving in New Zealand checking legal rules and responsibilities, guidelines, protocols and requirements.
  - They do want to learn the regulations and rules more than other nationalities
  - They have a need to know the rules to build confidence
- State the regulations – If we provide the information they will read it ( Transport, biosecurity, driver safety, accommodation guidelines etc.)
- Food is a key travel experience Chinese like to enjoy. Let them know ahead the opportunities and what is unique and possible. It's a great opportunity to introduce at this stage the New Zealand food and eating styles and make them feel more comfortable with and excited about the New Zealand way, specialties and must do experiences.





# APPEARANCES CAN BE DECEIVING

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- The most wealthy often don't look it.
  - Young people can be very wealthy
    - 20 -30 year olds have family money
    - 30-40 year olds have made money
  - The very wealthy are moving away from conspicuous show of wealth.

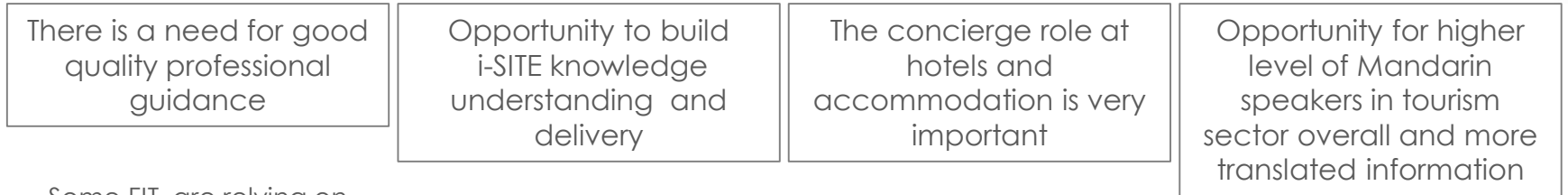


**It is important to welcome everyone and be open to suggesting personalised trade ups to all.**

# THEY ARE LOOKING FOR SUPPORT SYSTEMS

**There is currently a support gap in New Zealand**  
**Especially for the less confident independent traveller**

= Risk of poor experiences and rip offs =



Some FIT are relying on loose arrangements through contacts which are under delivering

Limited knowledge and confidence around i-SITES

Variable assistance

Language will always make it easier

**Require MORE Mandarin speaking specialist guides** e.g.:

- Guide for a day
- Specialist experience assistance

**Need greater visibility of, and access to, guides**

- Via i-SITES, hotels, car rentals, travel sites
- linked to activities e.g. golf, snow, cycling/walking...

**Build awareness of the i-SITE service offer**

- Awareness of its independence and that it is a free service
- Awareness of Mandarin language speakers/virtual concierge
- Awareness of the ability to book
- Awareness of comprehensive offers and cover within the region

**Customer service in accommodation needs to include providing comprehensive information**

- Informative
- Interested
- Taking time
- Available late and early
- Printed and verbal
- E.g. on weather/temp/how many layers of clothes

**Increase website translation and language delivery overall. This will:**

- Improve story telling and building the brand experience
- Improve understanding of safety and instruction
- Improve confidence

# 中文 CHINESE

Generally Chinese FIT visitors have some English capability, or someone in their group does. However this is not always the case, and skills and confidence are highly variable. They are often not confident to ask.

## LANGUAGE IS CORE TO CONNECTION AND THEN TO EXPERIENCE

**There is a wide range of language skills among Chinese FIT visitors**

- Important to manage safety.
  - Will build demand – the Chinese **will** gravitate towards operators who have Mandarin language capabilities.
  - Having Mandarin language capability ensures rich understanding and increases the value of experiences.
  - Enables richer sharing and story telling which will further build reputation and demand.
  - Minimises confusion, will encourage following the rules, and have more positive outcomes for Chinese FIT visitors with greater expectations being met by all parties.
- Require more Mandarin speakers in the New Zealand tourism industry**

# 中文 CHINESE

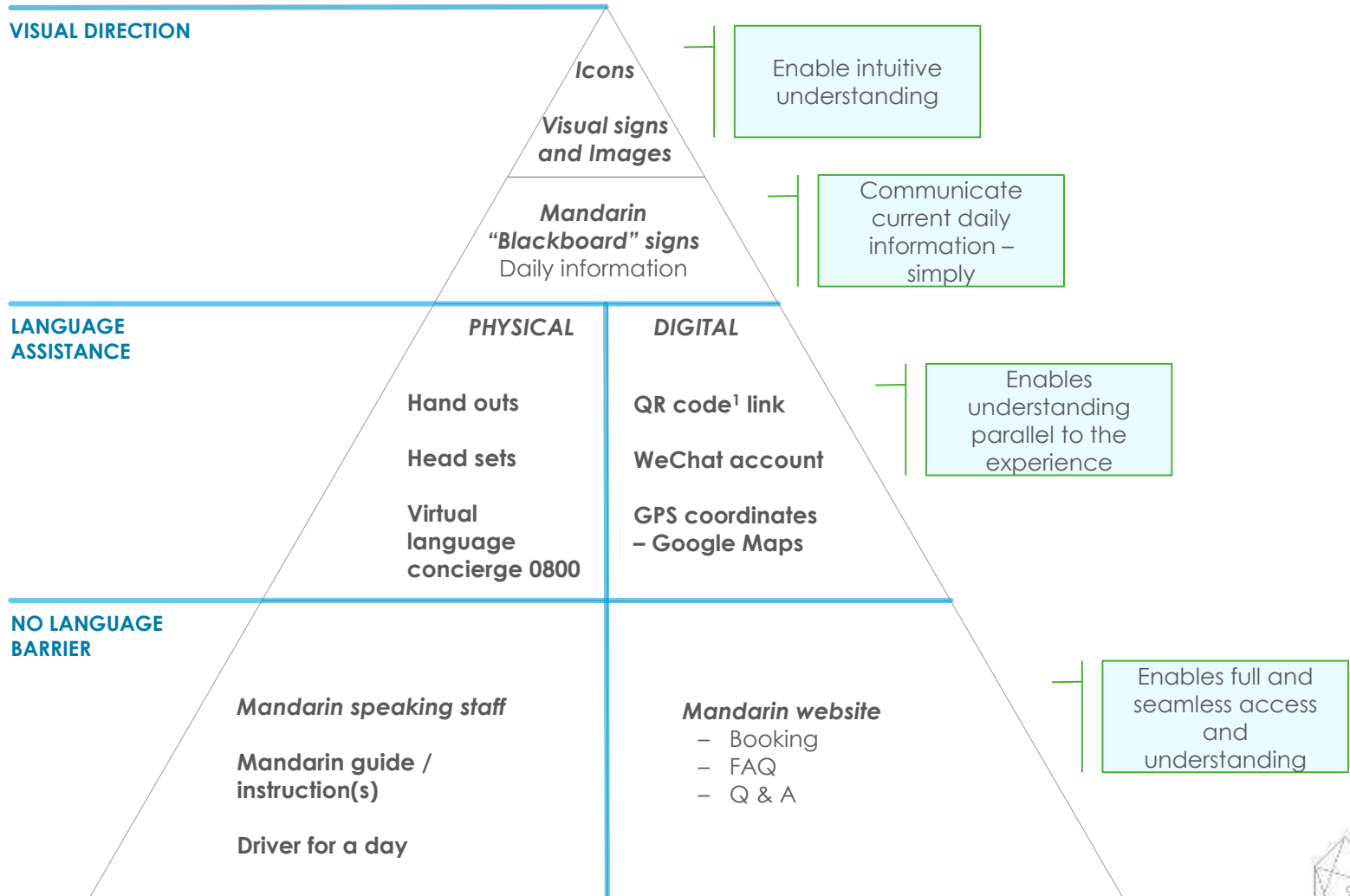
## LANGUAGE IS CORE TO CONNECTION

| ENGAGEMENT   | CONFIDENCE  | SHARING  | LEARNING   | SAFETY   | RULES AND GUIDELINES  | ACCESS   |
|--|---|--|--|--|---|--|
| <p>Meaning and stories are very important to create a sense of unique difference and can only be understood clearly with language.</p> | <p>Clarity gives confidence to participate and give something new a go. Questions are common and ideally will be answered in Mandarin. Chinese are currently often relying on Chinese rather than local New Zealand information which is sometimes incorrect or misleading.</p> | <p>The more knowledge they have of their travels and adventures the more likely they are willing to fully share experiences with others. Language connections are critical to the ability to build reputation, value and demand.</p> | <p>Chinese want to gain new skills, knowledge and experiences on their travels. There is an expectation that some knowledge or instruction is important. Opportunity to have simple translation available to reduce anxiety and build confidence in an activity. Could be as simple as translating New Zealand food ordering protocols or afternoon tea menus.</p> | <p>Chinese have a heightened sense of safety, they will give away responsibility and trust. Having safety rules in Mandarin enables greater participation and builds confidence. It also may increase value add as they will be confident to extend the activity into more of an intense activity.</p> | <p>Chinese are not rule breakers. Make rules clear and get understanding from them.</p> | <p>Having Mandarin language available opens their thinking to what is possible. It makes them feel welcome and more open to serendipitous moments. Translated signage is a clear indication you are open and welcome Chinese business.</p> |

# 中文 CHINESE

## LANGUAGE IS CORE TO CONNECTION & THEN TO EXPERIENCE

Different ways of communicating deliver different levels of understanding



<sup>1</sup>A QR Code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone.



# LANGUAGE TOOLS AND CHANNELS

|                                   | <b>ROLE</b>  | <b>INFORMATION</b>   |
|-----------------------------------|--|--|
| <b>Icons</b>                      | Cycle ways<br>Walk ways<br>Town navigation<br>Information<br>Toilets                           | Direction<br>Distance<br>Time<br>Aspects of interest e.g. photo spots, gardens, free access golf course...                                   |
| <b>Visual signs</b>               | Indication of food, experiences, accommodation   | Drawings, photos, symbols, images  |
| <b>Blackboard signs</b>           | Impermanent signs "we don't want it to look like China"<br>Chalk board style daily information | i-SITEs<br>Daily deals<br>Food specials<br>Weather, conditions   |
| <b>Handouts</b>                   | Pre-printed, images and words, keepsakes, link/<br>QR code – share for discount                | Safety<br>Contextual information<br>Regulations and guidelines<br>Story (why special and unique)<br>Experience options and costs             |
| <b>Headsets</b>                   | Short explanation /story prior to, or during an<br>experience                                  | Museum, gallery, pre performance<br>Pre experience for children and adults<br>(no headset during a performance to enable full<br>experience) |
| <b>Virtual language concierge</b> | Call up service to enquire and book, experiences,<br>transport, guidance<br>Q & A              | Supplement to i-SITE<br>Would need to be very clearly communicated<br>Availability outside the i-SITE  |



# LANGUAGE TOOLS AND CHANNELS

|   | <b>ROLE</b>   | <b>INFORMATION</b>  |
|---|---|---|
| <b>QR Code</b>                          | QR code linked to information in Mandarin   | Menus and food options<br>Promotions linked to sharing<br>Website or WeChat link    |
| <b>WeChat</b>                           | WeChat link to information, stores, offers  | Activity options  |
| <b>GPS location</b>                     | Specific GPS co-ordinates – enable exact geo location with confidence                               | Specific location – accommodation, activity, town, sightseeing, photo opportunities |
| <b>Mandarin website</b>                 | Detailed experience and information – inspiration, experience, cost, post experience photos / video | Activities, accommodation, transport, regions, food                                 |
| <b>Mandarin specialist staff/guides</b> | Explanation, instruction, inspiration, clarification  | All experiences   |
| <b>Driver for a Day/Guide</b>           | Explanation, instruction, inspiration, clarification  | All experiences   |

# DEALS ARE IMPORTANT TO ALL



Culturally a deal and obtaining a good value is important to Chinese.

- Saving is embedded in their psyche – they look for deals and it can be a good way of gaining attention
- It says they are acknowledged for their business
- Reciprocity in relationships is part of their culture. A deal is a way of “paying it forward” – one favour for another – your generosity encourages my generosity and a willingness to get more involved
- It says they are respected

It is important for businesses to:

- Consider their value and ‘deal’ strategy ahead
- Be clear and open about any saving offer or inclusions before booking. New Zealand is valued for being open, transparent and trustworthy. It is important that we continue this in the way we do deals and communicate savings
- Consider this as a way for operators to extend business – trading up and save, do more and save, bring more people and save

When considering a value return it is not always necessary to discount, however the deal can be a consideration in the decision to choose. A ‘free’ pick up and drop off to an activity may have more value than a price discount and may tip the balance in choosing a provider.

Consider how to add value (reputation, why stories, the best and most unique, trade up experiences) to reduce the need for discounting.





# DEALS ARE IMPORTANT FOR ALL

LOVE OF A DEAL DOES NOT MEAN  
THEY WANT THE CHEAP OPTION!



A deal can **build goodwill and delight**

A desire to save on **accommodation is common**

Group **discounts** are **shared**

Will **cancel** if a **better deal** emerges

Will go to **great lengths** to make a group saving

**Airfare** deals can trigger a whole trip to New Zealand

A price **discount** is **not necessarily a deal breaker**, opportunities are there to value add

Will **pre-book** if there's a **deal incentive**

A deal can **tip a decision**

A deal captures **attention**

A **saving** made on **one part** of the trip will be **spent on another**

# APPRECIATE



## INSIGHT

## IMPACT

## OPPORTUNITY

- |   |  |  |
|---|--|--|
| <p>1. A deal can <b>tip a decision</b></p>                      | <ul style="list-style-type: none"> <li>• Airfares can prompt immediate decisions to travel</li> <li>• Accommodation deals prompt choice</li> <li>• Experience deals prompt inclusion</li> </ul>  | <ul style="list-style-type: none"> <li>• Deals can be used to drive 'low season' demand and encourage trade up or multiple experience purchase</li> </ul>  |
| <p>2. Group <b>discounts</b> are <b>shared</b></p>              | <ul style="list-style-type: none"> <li>• The whole group benefits and feels good</li> <li>• Groups feel welcome and valued</li> <li>• Will encourage more to participate</li> </ul>  | <ul style="list-style-type: none"> <li>• Clearly outline group discount available to encourage booking, pre-booking and multiple booking and to clarify what is and is not available</li> </ul>  |
| <p>3. <b>Will go to some lengths</b> to make a group saving</p> | <ul style="list-style-type: none"> <li>• “Advertising” for members to join a FIT travel group or make up numbers is not uncommon</li> <li>• Members of the group may not know each other before the trip</li> <li>• Four is a good minimum – even for a honeymoon trip as costs are shared and it's more fun together</li> </ul> | <ul style="list-style-type: none"> <li>• Do not be surprised if groups meet on arrival and go straight into a campervan together</li> <li>• Expect groups of 4+</li> </ul>   |
| <p>4. A <b>discount is not a deal breaker</b></p>               | <ul style="list-style-type: none"> <li>• If they want to participate they will without a deal, especially for more unique, premium and individual experiences</li> </ul>   | <ul style="list-style-type: none"> <li>• Maintain pricing if there is no business benefit</li> <li>• Consider discount requirements when setting base prices</li> <li>• Build a clear value proposition – what, why, with a story</li> </ul>   |
| <p>5. A <b>deal captures attention</b></p>                      | <ul style="list-style-type: none"> <li>• They are regularly watching for deals for countries and experiences</li> <li>• Deal promotion can have high impact and cut through as a way of building awareness and consideration</li> </ul>  | <ul style="list-style-type: none"> <li>• Utilise deep discounting as a loss leader</li> <li>• Advertisement to drive awareness, consideration and trial – e.g. 3 \$10 trips – first in</li> </ul>  |
| <p>6. A deal can <b>build goodwill and delight</b></p>          | <ul style="list-style-type: none"> <li>• Feel good from a deal gives a sense of value, recognition and respect</li> </ul>  | <ul style="list-style-type: none"> <li>• Utilise deals and membership to build loyalty, recommendations and return trips e.g. 'top 4 golf club' discount and certificate, play on 2 – discount remaining 3, 2 day trip = hat, award</li> </ul> |

# APPRECIATE



| INSIGHT   | IMPACT  | OPPORTUNITY  |
|---|---|--|
| <p>7. A <b>saving</b> made on <b>one part</b> of the trip will be <b>spent on another</b></p> | <ul style="list-style-type: none"> <li>• Most travellers have a budget; part of regular travel planning</li> <li>• A saving on accommodation will be spent on activities</li> <li>• A shorter experience one day will enable more to be spent later</li> </ul>        | <ul style="list-style-type: none"> <li>• Do not assume people in lower value accommodation do not have a generous travel budget</li> <li>• Encourage trade ups linked to an outstanding experience – once in a lifetime, unique, special, must do, something to share – bragging rights</li> </ul>   |
| <p>8. Will <b>pre-book</b> if there's a <b>deal incentive</b></p>                             | <ul style="list-style-type: none"> <li>• Less likely to pre-book for weather dependent activity</li> <li>• Will pre book if the cancellation policy is clear</li> </ul>   | <ul style="list-style-type: none"> <li>• Must have clear cancellation policy</li> <li>• Use deals to achieve pre-booking</li> </ul>  |
| <p>9. <b>Airfare</b> deals</p>  | <ul style="list-style-type: none"> <li>• Chinese travellers can respond rapidly to airline discounts</li> <li>• Groups will often be on alert for deals on travel web aggregators</li> <li>• Low fares can trigger immediate purchase</li> </ul>                      | <ul style="list-style-type: none"> <li>• Deep airline discounting could result in strong, rapid demand growth</li> <li>• Last minute airline booking may not have land bookings – potential capacity issues – and opportunity to pull travellers into less heavily patronised regions</li> <li>• Airline discounts in the low season will drive travel</li> <li>• Low airfares will enable lower budget travellers who will also be looking for lower accommodation costs/camper vans</li> </ul> |
| <p>10. Will <b>cancel</b> if a <b>better deal</b> emerges</p>                                 | <ul style="list-style-type: none"> <li>• If cancellation is freely available they will use this facility if they find a better deal</li> </ul>  | <ul style="list-style-type: none"> <li>• Carefully consider the cancellation policies</li> <li>• Maintain contact to build relationship pre-trip</li> </ul>  |
| <p>11. Saving on <b>accommodation</b></p>   | <ul style="list-style-type: none"> <li>• They will try to reduce spending on accommodation</li> <li>• Sometimes this means – not declaring how many people are sleeping in a room</li> <li>• They do not want to be embarrassed – saving face is important</li> </ul> | <ul style="list-style-type: none"> <li>• Ensure rules and guidelines for room occupancy, smoking policy are clear – in a respectful and professional way</li> <li>• Ensure the rules and code of behaviour are in Mandarin – a hand out and in room notice</li> <li>• Consider a bond system – which is common in China</li> <li>• Welcoming Chinese with relevant pantry items is appreciated (soy sauce, chilli, vinegar)</li> </ul>   |



FORWARD

# BUILDING PRODUCT VALUE



# Building Value

## PRODUCT DEVELOPMENT

~ Everything Close ~

### DEVELOP EXISTING PRODUCT

### EXTEND WITH WHAT WE HAVE

### NEW PRODUCT DEVELOPMENT

#### AWARENESS

#### VALUE

#### EXPERIENCE

#### REGIONAL

#### SEASONAL

#### NATIONAL

#### FAMILY

#### ADVENTURE

#### FOOD

Make it accessible

Tell people why

Layer and trade up

*invitation*

*storytelling*

*options*

WHAT

WHY

HOW

Our ordinary is their extraordinary in more places

Develop 'must do' for the changing seasons. Demonstrate that how we are 'all good' for 12 months of the year.

Special interest

- Guided
- Targeted
- Enabled
- With food
- Learn to ski

Family time Building memories

Enabled stimulation

The best "must do"

Guided, learn to experiences, fly in and use, specialist equipment, exclusive (paid) access etc.

#### National

- Glow worms
- Sky dive
- Learn to fly
- Star gaze
- Abseil
- Zipline
- Bird experience
- Colonial farm and high tea
- River drift / jet boat
- Lake / beach – learn to biscuit, kayak
- Catch and eat
- Thermal in nature
- Glamping
- Honey

#### Local Icon

- E.g. southern lights, rock walk

- Golf
- Cycling
- Walking
- Food & beverage
- LOTR Lord of the Rings
- Gardens
- Photography
- Thermal
- Glamping

- Winter and Jun – Sep
- All seasons
- Learn – independence
- Experience and interest
- Share
- Stimulate
- Relevant to child decision maker
- Unique story
- Adventurous
- Translation, headset
- Henna tattoo
- Hands on animals
- Wildlife
- Bird song

- Ziplining
- Bungy
- Cliff walk
- Abseiling
- Horse / alpaca
- NEW
- Gliding
- Glass (bridge) walking
- Learn to fly
- Heli hunting, trekking, riding, on the top picnic
- Southern lights
- Catch it – eat it
- Alliances – tourism build on
- Simple
- Challenge
- Different
- Not fundamentally dangerous
- Not exhausting

- Xin Xian De (Fresh Fresh)
- Farm to plate
- Sea to plate
- Mixed cooking styles
- Tasting platters and sharing dishes
- Sauces and seasonings
- Eat like the locals
- Unique, different, special, the best
- Interactive – seeing, cooking
- Hot Pot
- Regional icons "must try"
- 10 must do New Zealand dishes "bucket list"
- Honey snack
- Kiwifruit smoothie

- Signage
- Cluster links
- Digital transaction
- QR Code
- Geolocation
- Internet coverage

- Unique
- Special
- Different
- Compelling
- Renowned

- Choices
- Personalise
- Different options – length, difficulty, challenge
- Add on
- Viewing and doing
- Build serendipity

CONTINUOUS REVIEW & IMPROVEMENT

ASK YOUR CUSTOMERS



# BUILDING HIGH VALUE EXPERIENCES

## IT'S NOT ABOUT THE CHEAPEST PRICE

There is a shift from sightseeing tourism to experience focused

A shift from **price based** choice to **experience based** choice

They will pay if it delivers value

A MUST DO EXPERIENCE

### Knowledge – WHAT

Intriguing, engaging, challenging

### Story – WHY

Special, unique, different, intriguing, involving, challenging

### Reputation – WHO

How many, what rating, friends, family, opinion leaders



Will pay more for:

- **A better experience** – with a story, uniqueness, guidance, an experiential challenge, reputation - the best, must do.
- **An experience that doesn't repeat itself** – e.g. fly one way and bus the other, or drive and boat. Not repeating the same path.
- **A personalised experience** for the group, tailored length.
- **An experience with variety and contrast** e.g. jet boat at speed, then stop and listen to the silence, see a unique waterfall, and a story – tell them why this is special.
- **Extras that enhance the experience and build the memory at a quality level** e.g. photo / video memory package, certificate, awards, recognition keepsake, keyring, t shirt / hat / head banner. It must be of high quality and deliver to expectations for sharing. They won't share if the quality is low.
- **An experience where there is a smaller group** (under 10) – enabling full involvement and instruction.
- **An experience that is immersive and hands on** – e.g. specialised ice shoes, instruction and safety briefing, walk on a glacier that is moving 5 metres per day – the fastest in the world.
- **An experience that is involving but relatively easy to access** e.g. fly to the track, walk up to a high point for photos and lunch and heli-ride or walk down.
- **An experience that is exclusive** e.g. one of 'Top 50' golf courses in the world, limited access.
- **An advanced experience**, building skills and learning new things.

# DEVELOPING STORIES AND ICON EXPERIENCES



Story telling and story doing are core to building meaning, relevance, desire, and “must do” value

- A story – why is at the heart of:
  - Reputation and recommendation; delivering = reassurance, confidence and desire
  - Social capital and stories for sharing are very important to Chinese visitors
  - A story can make our ordinary, extraordinary
- Story telling is relevant to regions, experiences and activities, food, accommodation, and the development of icons.

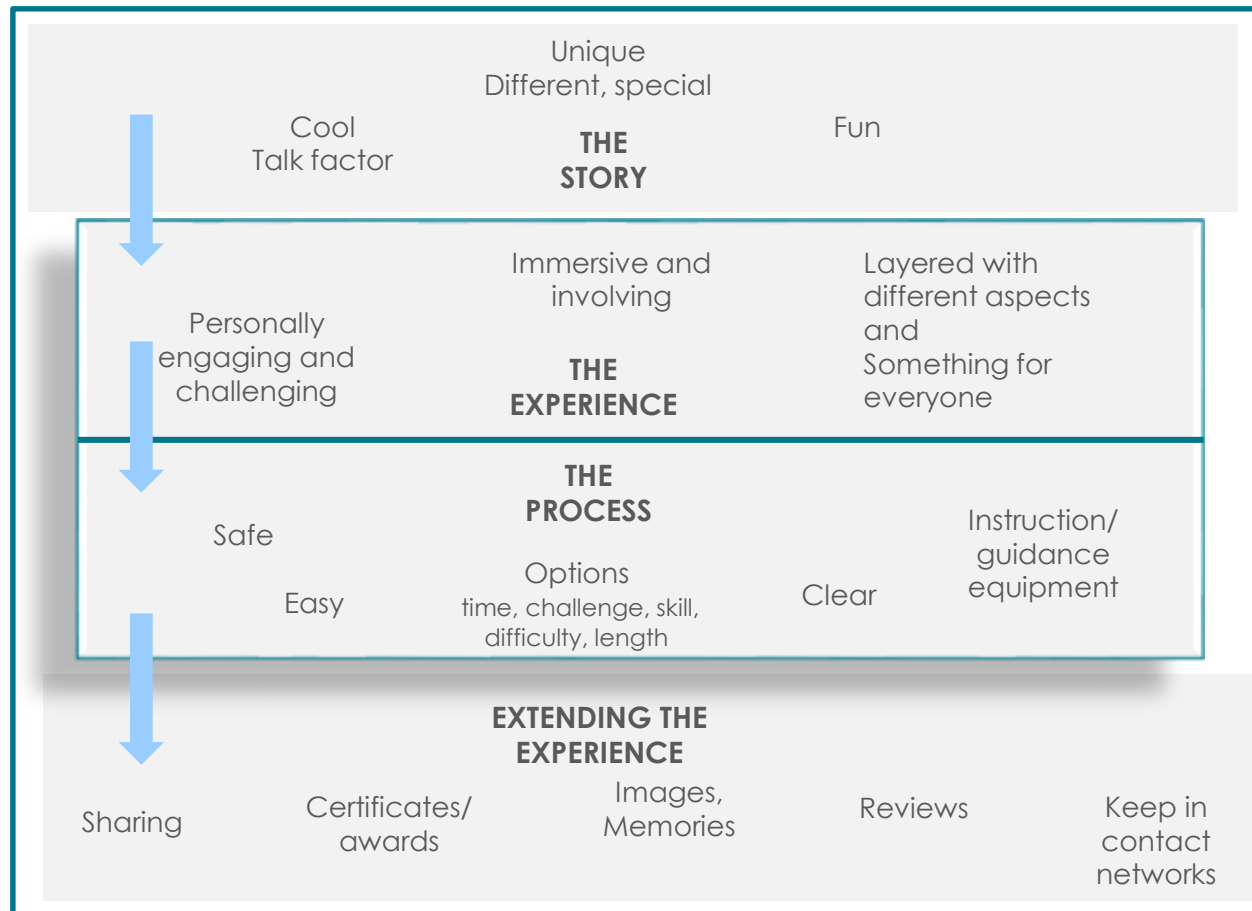
|                        |                                    |
|------------------------|------------------------------------|
| <b>WHY</b> – feeling   | Experience the excitement...       |
| <b>WHAT</b> – thinking | The world's fastest...             |
| <b>HOW</b> – doing     | Three levels of...<br>Choose to... |

- Developing relevant stories is important in increasing value, extending demand across regions and experiences.



# PRODUCT DEVELOPMENT GUIDELINES

A strong product for the China FIT market will have: a clear involving experience, a compelling and unique story about the experience, and a clear process that gives confidence and a way of extending and sharing the experience.





# WHAT GETS DESTINATIONS ON THE LIST



Consideration starts with  
**IMAGE and IMPRESSION**



What activates commitment  
to go:  
the promise of **EXPERIENCE**

***“ What you feel and encounter ”***

Events, promotions, movies, media,  
travel media

Friends and families experiences,  
suggestions

Internet travel search experiences

***“ I want to do all those things...  
Every week my friend would tell  
me another story about what they  
did in New Zealand ”***

Clear impression of what the  
experience might be like

Places, people, activities



FORWAF



# Understanding the New Zealand Food and Beverage Opportunity



# FOOD IS VERY IMPORTANT TO THE CHINESE

## Its almost an obsession

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Food is not just functional.

- It's a source of enjoyment and satisfaction
- Social, sharing, hosting
- Its about respect and acknowledgement for your guests
- They enjoy the ritual nature of eating and marking of special occasions

Food is a part of the greeting and welcome.

- The importance of food is evidenced even in common historic language. A common greeting is not just "Ni Hao" i.e "hello" but also can easily be "Ni chi bao le?" meaning have you eaten?

While there is a strong preference for Chinese style food and flavours, this is changing with more well travelled Chinese and younger people.

# NEW ZEALAND: FOOD EXPERIENCE



**100% Pure  
New Zealand**

*Taste New Zealand*

**New Fresh**  
The very best natural ingredients in the world from source

**Zero distance immersion**  
End to end experience  
Hands on

**Diversity**  
Many different experiences and choices  
Unique, local specialties  
Easily available

**The actual produce is key**

*Feel it, see it, touch it, do it, taste it, share it*  
**TRY IT**



# FOOD AND BEVERAGE: KEY INSIGHTS

Chinese coming to New Zealand do want to experience New Zealand food.

- While they are happy to try New Zealand dishes they would like a balance of Asian foods – some they cook themselves, some they eat out at eateries. A warm friendly welcoming smile is often what they need to get them in the door.
- They particularly find attractive
  - Offers of tasting plates and samplers
  - Asian style cuisine including Japanese, Thai, South East Asian
  - Self catering facilities in motels and serviced apartment style accommodation.
- The “New Fresh” (Xin Xiande) – the very best of natural ingredients from farm or sea to plate - is what sets New Zealand apart and is attractive.
  - Telling the story of what, why, where, the source of food and its uniqueness is a strong value build opportunity
  - Building local regional specialties and icons or “must do” foods is a way to build regional attraction and value demand.
- Seafood and lamb are the most desired foods to consume in New Zealand. Fresh fruit, vegetables and beef are also sought out.
  - Include fresh seafood in all menus, in a variety of cooking styles (steamed, deep fried, braised, hot pot (stock))
  - Sauces make foods more palatable (dry and tasteless without).
- Premium seafood is crayfish (lobster), deep sea fish, oysters and shellfish.
  - Any premium menu should include fresh caught crayfish – not frozen.
- For some they find It is difficult to find ‘icon’ and specialty food experiences.
  - There are opportunities to develop local, regional and national food trails.  
A specialist user generated and reviewed food app / with geolocation and search themes would help find great food experiences and develop food itineraries in New Zealand.
- Basic Chinese ingredients include:
  - Soy sauce
  - Vinegar (rice wine)
  - Chilli
  - Hoisin Sauce
  - Chicken / vegetable stock.
- Including Chinese ingredients as condiments and in pantry boxes or ‘pantry mini bars’ will be an appreciated gesture.
- Offer a Book a Kiwi meal pack when booking the accomodation. Make available all inclusive recipe and ingredients with instructions. Options of Lamb, Seafood and BBQ are all good options.
- Chinese appreciate being able to order Chinese condiments with :
  - BBQ meat or seafood
  - Rice / rice noodles
  - Vegetables



# DEVELOPING THE PROPOSITION AND ICONS

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## National

- Develop our competitive New Zealand food proposition as.

### *New Fresh (Xin Xian de)*

- Utilising more of the paddock to plate or sea to plate concepts.
- Identify where the food is from and that it is freshly caught or harvested.

## Icons

- To create the icon experience requires a special preparation or flavour story  
*Create a sense of “**You can’t leave New Zealand until you’ve tried these icon dishes!**”.*
- Convey how this unique produce is experienced.
- It is not just about the ‘What’ but the ‘WHY’.



# LAYERS OF EXPERIENCE

## Food is a multi sensory experience

Building layers into the experience adds depth, meaning and enjoyment to the experience.

- **The back story** Why is this special, famous, rare, limited, new, seasonal, unique?
- **The source** Where is it from – can I see and experience this?
- **The environment** The specialness of eating in great places.
- **The people** Who I am with and the local people I meet.
- **The experience** ***Feel it, see it, touch it, do it, taste it, share it, TRY IT.***

## Regional opportunity

Real interest in regional differences and specialities – must dos while here:

- Adds a sense of layered experience.
- Creates a focus for itinerary planning and the possibility of different trips to New Zealand.
- Can tell the story better to friends and family better.
- Builds on local availability and fresh produce – close to sources.

### IMPLICATION

Build on local and regional availability of fresh produce combined with 'at source' experiences.



# DEVELOPING THE FOOD EXPERIENCE

## The importance of Story

Leads to understanding of why the food is special, has been included, where it is from, who made it. This then becomes another layer to the experience and part of the story and photo to be retold.

Food can become one of the anchor, must do experiences that motivate travel decision-making and provide a structure for an itinerary.

Chinese FITs seek:

- Local speciality food, most famous food,  
*“I had to try the pig foot in Germany”.*
- Food in the ‘Most famous scenery’.
- Unique experiences:  
*“experience what we can’t eat in China”*  
*“get something special that is much better value there – e.g. crayfish”.*

## IMPLICATION

Ensure story is clear/understood, interesting and compelling for each experience.





# FINDING, PLANNING AND BOOKING FOOD

Identifying and finding great food experiences /restaurants is often difficult . Understanding and choosing from a menu can also be difficult around language. Having a QR code linked to a menu which is translated in Chinese and has photos can be of great assistance and reduce anxiety.

## **Will pay for great food experiences**

*“I like to spend more on food – if a cheap hotel is good – that’s okay (if not I will move to 5 star) – but food is really important”.*

→ Experiences creating food are sought and there is a willingness to pay for the very best natural ingredients and great (Asian) flavours.

## **The search for an enjoyable meal**

*“We are very interested and picky – we want very delicious food – sometimes we don’t find it delicious”.*

→ Clarifying the style of food will help navigation and managing expectations.

*“We check where to go online – look for a recommendation for delicious food – we don’t want a random choice”.*

→ Online comprehensive and up to date guidance is very important.

→ Search apps would help – what is available where.

→ Welcome and a patient attitude to help those who look uncertain.

→ Identification of signature dish menu items.

## **Pre-booking**

*“I will book in advance but often eat simple food because you have to book ahead”.*

→ Providing good quality food options not requiring booking would be helpful.

## **IMPLICATION**

In planning material/sites/apps – give clear description of food styles and flavours, and easily navigated, clear recommendations or links to reviews.



# DEVELOPING THE FOOD EXPERIENCE

## **Food as part of experience**

- Integrating food into a total experience can be an added and valuable attraction.

**Taking people close to the source of food** – if food can be integrated and it is from the local area, this is a plus.

## **Cooking your own is popular:**

- Shared BBQ
  - Personalised experience
  - Asian flavours
  - Produce focus
  - BBQ meal – Pre-pack/semi catered (box)
  - Include cooking within an activity or experience.
- Serviced apartment/motel
  - Purchased ingredients.
- Restaurant
  - Bring the fish that you caught to be cooked.

## **Cook together**

- Provide opportunities to enable visitors to be part of the cooking experience.

### **IMPLICATION**

An option for interaction at source, as well as new fresh ingredients, will be strongly appealing.



# FOOD ACCESSIBILITY

## Images are key to enabling easy choices

In restaurants and cafes there is considerable anxiety about making a choice (face in front of others, confusion, inability to read English).

Without images of the options, or menus in Mandarin, this is extremely difficult – especially with hand written black board menus.

Understanding protocol can be difficult – e.g. when to order, how to eat:

- Visual images of food offers are preferred – or menus in Mandarin
- Sensitivity and guidance is important to customer service.

## Apps and review websites

- Used extensively when available to find “good” places with reviews.
- Selecting and finding great food experiences digitally is attractive:
  - Where (relative to me)
  - What (style, price)
  - Price (indication)
  - Parking (availability suggestions)
  - Reviews (who else liked it).

→ Location and review apps of food experiences are an opportunities.

→ Access to reviews is important.

### IMPLICATION

Use of visual images is important to guide decision-making. Anticipate desire for Asian options alongside Western style food. Ensure review apps and websites are easy to access, linked to other information and emphasise the key information.

# THE CHINESE PREFER CHINESE CUISINE – HOW DO WE DELIVER?



## **Preference for Asian flavours**

While Chinese visitors absolutely want to try the local and unique food, they also strongly prefer Asian flavours and will continue to want Asian experiences. The more travelled they are, the more open they are to European food.

## **Asian food experiences**

While Chinese cuisine is preferred, Japanese and South-east-Asian flavours and styles are also enjoyed. Sushi is preferred over sandwiches – any image with sandwiches is less appealing.

## **Experimentation**

Ideally tasting platters, small plates and serving sizes that enable sharing allow trial of different things with less risk. Tasting with an opportunity to buy is attractive – e.g. wine, honey, olive oil,... these become gifts with a story.

## **Breakfast is important**

Many Chinese like a hot breakfast – ideally with congee available. They will go to a café if they know it has congee. They will also sample something uniquely New Zealand

## **Hot is important**

An option of hot rice and noodle dishes for lunch forms a staple and while this is not always required they will seek it out. There is opportunity to further deliver simple noodle based dishes

## **Kiwi favourites are not for everyone...**

Sandwiches one the least favourite option, fish and chips might be tried but generally not popular among Chinese travellers – hamburgers are preferred

# NEW ZEALAND

## ZERO DISTANCE IMMERSION EXPERIENCES



### Food journey itineraries

*Unique and Different – Original untouched experiences*  
*Themed experiences – Seafood, spring*  
*Pick your own – make your own*  
*Food (purposeful with story) integrated with experiences*  
*Abalone off the Rocks, Berry Milkshake from the farmer, make your own ice-cream, catch it*

### Famous food experiences in famous settings and locations

*“Famous” Restaurants or chefs with New Zealand sourced ingredients, with options of Asian inspiration or New Zealand style*

### Top icon experiences

*Icon festivals – e.g. featuring mussels, bluff oysters, whitebait, wine harvests, regional wine and food, farmers markets*

### Familiar home away from home experiences

*DIY New Zealand - Cook in apartments with Asian Condiment box, and meal idea options.*  
*The Great New Zealand BBQ, order your own Kiwi BBQ pack with all accessories and balcony / garden dinner setting.*  
*Wine match suggestion.*



# DIFFERENT FOOD NEEDS AND EXPERIENCES

There is a desire and a need for variety – between and within experiences.





# ICE-CREAM

New Zealand ice cream is a “must-do” New Zealand experience.

- Opportunity to offer New Zealand ice cream ‘mini bar’ option in hotel.
- New Zealand ice cream trial opportunity:
  - Location – e.g. sit on Onetangi Beach
  - Where – e.g. from the x street and looking out across the square
  - What – eat New Zealand local organic or enjoy in a Tip Top ice-cream cone.
- Fresh fruit ice creams:
  - Mixed in
  - Fruit on top.
- Make your own ice cream
  - Choose base, fruit, inclusions
  - And churn!
- Unique New Zealand flavours – e.g. hokey pokey, gingerbread.
- Being able to sit down together rather than walk with ice-creams is preferred.





# FOOD ORDERING FOR CHINESE IS NOT ALWAYS EASY

Many Chinese are unfamiliar with written names and descriptors of dishes.

Photos are always helpful, but practically the option of having a menu with pictures can also detract from the cafe/restaurant image you may want to portray.

An option is to have your special items, or all of your menu translated or presented pictorially and accessed through a QR code<sup>1</sup> that Chinese FIT can access. This far more subtle and makes ordering much easier.



<sup>1</sup>A QR Code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone.





FORWARD

# SPECIAL INTEREST – NATIONAL THEMES





# SPECIAL INTEREST OPPORTUNITIES

The following illustrates the different special experiences of particular interest to Chinese FIT visitors.

## A part of a New Zealand experience

### Choices and options to experience on the New Zealand trip

Planned or incidental, available throughout New Zealand

#### Food:

seafood, fruit and produce, markets, fine dining, sharing platters, ice-cream  
Regional specialities

#### Wine & beer & specialist beverage

#### Cycling

#### Walking

#### Farm animals/alpaca

#### Specific

Why  
What  
When  
Where

## Support experiences

- Art galleries, experiences
- Museums + historic places
- New Zealand café culture, supermarket
- Festivals

## Anchor experience

### "Must do inclusion" + guides itinerary planning

Single itinerary anchor, booked ahead

- Star gazing
- Whale watching
- Glacier walks
- Sky diving
- Bungee jumping
- Lord of the Rings "Village"

#### DEVELOPMENTAL

- Glamping
- Themed authentic accommodation e.g. star, tree house, Hobbit Cave
- Gliding
- Cliff walking
- Volcano

#### "SMALL"

- Ice cream making
- Sun rise watching
- Oyster/ seafood experience
- Sea/Paddock to plate

Festival Future – Reputation  
Matariki star gazing/Aurora  
Snow / winter  
Whale migration

## Theme experience:

### Guides the whole itinerary planning

Major focus – multi day activity

- Hiking
- Cycling
- Photography
- Gardens
- Snow
- Golf
- Premium adventure
- Wildlife – scenic

#### DEVELOPMENTAL

Food

# HIKING



|                   |  |
|-------------------|--|
| Relevance Overall | <ul style="list-style-type: none"> <li>• Relevant to a specific targeted group. - the adventurous, who are travelling to places like Tibet, Tasmania and other National Parks.</li> <li>• Low general appeal, but increasingly aspirational.</li> <li>• Not a 'must do' but an 'I'd like to in the future'.</li> </ul>   |
| Issues            | <ul style="list-style-type: none"> <li>• Timing on strict itineraries doesn't allow luxury of walking. Chinese generally are not aerobically fit – fear of exhaustion and overdoing it prevents Chinese visitors walking trails.</li> <li>• Little or no awareness of New Zealand having UNESCO World Heritage Status in National Parks. Tongariro and South West South Island.</li> <li>• It's part of a specific special interest, not of general appeal.</li> <li>• Information and navigation with no English is difficult – they may not understand the protocols for managing personal safety.</li> <li>• Few Mandarin speaking guides to help if needed. Without good real time track information in Mandarin , visitors could encounter real difficulty, especially with changes in the weather.</li> <li>• They are not used to going to places where there is no GPS or Wi-Fi coverage to seek help. This makes them anxious.</li> </ul> |
| Risk              | <ul style="list-style-type: none"> <li>• No understanding of the difference between a walk and a trek in New Zealand. There's a great possibility they could be unprepared.</li> </ul>   |
| Targeting         | <ul style="list-style-type: none"> <li>• Target special interest trekking enthusiasts in China. With previous experience in Nepal or similar.</li> </ul>   |
| Opportunity       | <ul style="list-style-type: none"> <li>• Promote through targeted social media and trekking channels.</li> <li>• Promote better developed tracks – “Great 10 Walks of New Zealand”. Where guided walking is available.</li> <li>• Ensure Mandarin safety information is available on New Zealand official web sites.</li> </ul>  |

## Development



- Personalised guided walks tailored to individual needs.
- Shortened versions:
  - Fly and walk
  - Boat and walk (Queen Charlotte, Abel Tasman).
- National network promotion in targeted specialist channels in China.
- Clear facilities and gear requirements and safety protocols (including food and cooking needs) in Mandarin online.

# WALKING



Walking is associated with very well defined and manicured paths and exceptionally clear icon signage with times and distances on maps to key waypoints. Note taxing gradients.

|                   |   |
|-------------------|---|
| Relevance Overall | <ul style="list-style-type: none"> <li>• Walking is a pleasant way to be a part of nature, scenery and the environment, going to see something, not generally a walk for its own sake.             <ul style="list-style-type: none"> <li>- A photographic spot:                 <ul style="list-style-type: none"> <li>- Garden</li> <li>- Wildlife</li> <li>- Waterfalls.</li> </ul> </li> </ul> </li> <li>• A long walk for its own sake has limited appeal – there must be a story – “the tallest, fastest”...</li> </ul> |
| Issues            | <ul style="list-style-type: none"> <li>• Concern about getting lost or injured:             <ul style="list-style-type: none"> <li>→ Clear icon signage with location, time and distance needed. Regular updates on the walk.</li> <li>→ Easy grade. Wide undulating, not steep.</li> <li>→ GPS and cell phone coverage to call for help if required.</li> <li>→ QR code information on points of significance and history.</li> </ul> </li> </ul>  |
| Risks             | <ul style="list-style-type: none"> <li>• Takes longer than expects.</li> <li>• They don't find the walks that are available.</li> </ul>   |
| Targeting         | <ul style="list-style-type: none"> <li>• All travellers, including families.</li> <li>• Seasonal walks – Autumn, Spring.</li> <li>• National/regional walks network – with unique experiences and stories:             <ul style="list-style-type: none"> <li>- Digital Chinese option</li> <li>- Geolocation.</li> </ul> </li> </ul>   |
| Opportunity       | <ul style="list-style-type: none"> <li>• Digital information on available walks – Geo location near you.</li> <li>• Time and walk way on cell phone.</li> <li>• Suggestion – “if you like this .....then...”</li> <li>• Link to other experiences:             <ul style="list-style-type: none"> <li>- Photography</li> <li>- Cafés</li> <li>- Boat hire.</li> </ul> </li> </ul>   |



# CYCLING



|                             |   |
|-----------------------------|---|
| <p><b>RELEVANCE</b></p>     | <ul style="list-style-type: none"> <li>• Biking is not an aspirational activity. In China it is socially linked to poor people and low status (commuter transport).</li> <li>• To be at all relevant and socially acceptable it must be presented with a sporty premium high tech bike and leisure lifestyle.</li> <li>• There are two opportunities:             <ol style="list-style-type: none"> <li>1. Casual sightseeing from the hotel/vineyard, e.g. 1-3 hours with stops (e.g. Mission Bay waterfront).</li> <li>2. A specific special interest bike trail tour. This is very specialised and targeted.</li> </ol> </li> </ul>   |
| <p><b>ISSUES</b></p>        | <p><b>Urban Cycling</b></p> <ul style="list-style-type: none"> <li>• Need maps and would like GPS with suggested itinerary and points of interest.</li> <li>• Safety – road rules and bike courtesy – needs to be in Mandarin.</li> <li>• Prefer to be off the road.</li> <li>• Want a flat, not hilly or difficult ride.</li> </ul> <p><b>Bike Tours</b></p> <p><b>Awareness</b></p> <ul style="list-style-type: none"> <li>• Understanding the equipment and quality of trails in New Zealand.</li> <li>• Understanding that there is infrastructure – hire, drop off, pick up, transfers, quality bikes.</li> <li>• Concern about getting lost – loss of data coverage for GPS mapping and phone.</li> <li>• Concern about level of difficulty – length, climbing.</li> <li>• Equipment needed – drinks, food, sun protection...</li> <li>• Breakdown protocol.</li> <li>• Electric bikes are relevant <b>but</b> must not be called this, which is linked with low social status             <ul style="list-style-type: none"> <li>– Must be called power assist bikes and look like a standard sport bike.</li> </ul> </li> </ul> |
| <p><b>TARGETING</b></p>     | <ul style="list-style-type: none"> <li>• Bike tours target for special interest bike enthusiasts in China, through targeted clubs and media.</li> <li>• Adventurer who wants full immersion in the outdoors, with a social experience.</li> <li>• Friendship groups, with interests potentially also in wine, flowers, photography, nature.</li> </ul>  |
| <p><b>OPPORTUNITIES</b></p> | <ul style="list-style-type: none"> <li>• Targeted special interest promotion in China.</li> <li>• Key Opinion Leader activation</li> <li>• Variable itineraries – ½ day – 2 day options.</li> <li>• National “must do” – itineraries with differentiated environmental experiences.</li> <li>• Chinese language – maps, safety.</li> <li>• Cell phone coverage – enabling GPS and information.</li> <li>• Core China relevant cycle ways.</li> </ul>  |





# PHOTOGRAPHY

|                      |   |
|----------------------|---|
| <b>RELEVANCE</b>     | <ul style="list-style-type: none"><li>• Photography is a very popular hobby among the Chinese. It is linked to the desire to produce good photos for sharing on social media.</li><li>• Many travellers have specialist SLR cameras, extensively post photo shop material, and seek out different, unique and dramatic images.</li><li>• Photo competitors are common.</li><li>• Photography oriented itineraries and local information on the best photo locations and time of day are very relevant.</li><li>• New Zealand has a reputation for great naturally dramatic photo locations.</li></ul> |
| <b>ISSUES</b>        | <ul style="list-style-type: none"><li>• Better guidance required from hotels and via local photography app re:<ul style="list-style-type: none"><li>– Sunrise and sunset times</li><li>– Weather forecast</li><li>– Best photography locations</li><li>– Local photography guides.</li></ul></li></ul>  |
| <b>TARGETING</b>     | <ul style="list-style-type: none"><li>• Special photography interest and general interest.</li></ul>  |
| <b>OPPORTUNITIES</b> | <ul style="list-style-type: none"><li>• Specialist national and regional itineraries – taking people to unusual, unique, dramatic environments – with themes – garden, wildlife, mountain, landscape.</li><li>• Guided photography experiences – astrophotography.</li><li>• Guided heli photographic experiences.</li><li>• Seasonal photography itineraries.</li></ul>  |



# SNOW / WINTER



|                      |   |
|----------------------|---|
| <b>RELEVANCE</b>     | Three targets: <ul style="list-style-type: none"><li>- Incidental family and friend snow play and learn experience.</li><li>- Special interest ski – skier interest is rising especially with the 2022 China Winter Olympics. This is becoming a more aspirational experience.</li><li>- Special interest snow – dog sled, snow drive, snow mobile.</li></ul> The 1 <sup>st</sup> June – 1 <sup>st</sup> September China summer school holidays offer a great New Zealand opportunity. Offers an escape from Chinese heat and focused, relaxed family time in nature. |
| <b>ISSUES</b>        | <ul style="list-style-type: none"><li>• Lack of Mandarin speaking guides – bonafide.</li><li>• Lack of knowledge and confidence – how to get up icy roads, where to go, how to access equipment.</li></ul>  |
| <b>OPPORTUNITIES</b> | <ul style="list-style-type: none"><li>• Provide specialist winter experiences.</li><li>• Close to snow accommodation – immersive experience, easy and seamless.</li><li>• Snow experience, guide assistance:<ul style="list-style-type: none"><li>- Help to get onto the mountain, equipment and general guidance</li><li>- In Mandarin .</li></ul></li><li>• Learn to ski – Chinese guides.</li><li>• Snow play – all inclusive half day, full day packages with limited group size and Chinese guides.</li></ul>  |

# GARDENS



|                   |  |
|-------------------|--|
| Relevance Overall | <ul style="list-style-type: none"><li>• The beauty of flowers, blossoms, garden shapes are very attractive:<ul style="list-style-type: none"><li>- Natural immersion in beauty</li><li>- Photography opportunities.</li></ul></li><li>• It is an easy experience, that is not draining or difficult.</li><li>• It is associated with a specific 'must do' time of year and will be planned for those with an interest.</li></ul> |
| Issues            | <ul style="list-style-type: none"><li>• Lack of awareness – e.g. must go beyond the lupins in the South Island.</li><li>• No knowledge of New Zealand rural colonial garden heritage.</li><li>• A lack of reputation – means they are difficult to find – often they will visit public parks in season.</li></ul>  |
| Targeting         | <ul style="list-style-type: none"><li>• Intergenerational family visitors.</li></ul>   |
| Opportunity       | <ul style="list-style-type: none"><li>• Build regional and seasonal reputation<ul style="list-style-type: none"><li>- Taranaki, Whanganui, Manawatu</li><li>- Other regions.</li></ul></li><li>• Build a national time of month geolocation guide:<ul style="list-style-type: none"><li>- Including opening hours.</li></ul></li><li>• Build in with high tea, colonial, live like the locals type experiences.</li></ul>        |





# ECO WILDLIFE IMMERSION

There are opportunities to create wildlife itineraries around New Zealand, linking unique and dramatic natural, zero distance immersion experiences. e.g Dawn Chorus Bush walks in local areas, view seal pups at a waterfall. These can be guided experiences.



FORWARD



FORWARD

# CHINA GOLF



Note: a full golf report exists separately

'Activating The CHINA GOLF Market And Increasing Value Delivery To Visitors and The Sector' 2014



Currently golf is an elite and exclusive activity in China. It is a positively enriching experience; socially and experientially.

## ELITE

精 英

Jīng Yīng

## EXCLUSIVE

### New

Golf is a new sport in China < 12 years old

### Expensive

New Zealand \$100k + Membership \$120 per round

独

Dú

享

Xiǎng

Foreign Etiquette & Protocol

Socially Aspirational

## ABUNDANT

### Expansive Outdoors

Open, not crowded

### Beautiful Sanctuary

Manicured, calm, cared for

丰

Féng

富

Fù

Personally Enriching  
Building skills and relationships

Non taxing sport

Physical but achievable

**“A life less ordinary”**

→ Golf tourism is an extension of this experience internationally. Chinese golfers are currently looking for exclusive and expansive, abundant experiences.



New

Expensive

### EXCLUSIVE

*"A life less ordinary"*

独 享

Dú

Xiǎng

Foreign  
Etiquette &  
Protocol

Socially  
Aspirational



### 2 Key channels to play golf in China

#### Golf Course Clubs

- Elite
- Expensive to join and play
- Very close link to business clubs and associations
- Takes time to get there
- Closed – by invitation or membership only
- Composed but not dramatic courses
- Strong support – caddies, classes, coaching
- Extensive club facilities for socialising



#### Driving Range Clubs

- Relatively accessible – location and cost
- Role: to learn, practice, socialise
- Composed and professional atmosphere
- Some players have never played on a course – This is their golf
- Course club day once a month – A course based tournament for range members



➤ Access is limited and currently is largely the preserve of the rich and connected



ELITE

精 英

## The Golfer

The T Shot

Stories to tell

Meeting new people and building connections

New bold experiences

Personal challenges and learning

DRAMA

戏 剧 化

Xì Jù Huà

***“A life less ordinary”***

The current Chinese golfers lead a privileged life. They are:

- Wealthy, time rich, well connected socially.
- Very well travelled, sophisticated experienced travelers.
- Travelling internationally many times a year – often having multiple golf trips abroad.
- Their lives are interesting and they are constantly seeking stimulation and different and new experiences – because they can. They are looking for dramatic experiences – to extend themselves and provide enriching stories to share.
- They are savvy and may, or may not require 5 star accommodation.
- Building business relationships and networks is a key focus for many.

# GOLF + TRAVEL



Live like the Raj  
*"stay in a palace and visit the ancient temples"*



Be a cold war Russian hero  
*"we are going to drive a tank and shoot rockets"*

## DRAMA

**Transformative  
unique experiences**



Discover the ancient civilisation of Egypt  
*"stay in the desert and experience past civilisations"*

Big  
Bold  
Unique  
Experiential  
*"3D involvement and immersion"*



Experience the history of Europe  
*"Live the way they did in the past"*

➤ **New Zealand MUST deliver a sense of drama to be relevant to the elite Chinese golfer**

# THE PREMIUM MEW ZEALAND PROPOSITION



## 100% Pure New Zealand

**New Zealand  
is associated  
with beautiful  
environments**

**BUT**

Risks being too passive to generate a passionate desire to come for the elite traveller who wants dramatic and memorable golf and travel experiences

**Will it be boring?  
What else is there to experience?**

**New Zealand  
has some  
association  
with golf  
(Lydia Ko)**

**BUT**

It is not 'top of mind'

**Why – what is available and special  
about the golf experience in New  
Zealand**

# AND THE NEW ZEALAND GOLF IS SPECTACULAR



## New Zealand

**DRAMATIC  
INTENSITY**

**Experience and  
indulge in the  
intensity of the  
untouched**

**Everything Close  
ZERO DISTANCE  
immersion**

**DIVERSITY**

Variety

Many  
Different  
Contrasting  
Choices

Options  
multi  
layered

**EASE**

*Inclusive  
Accessible  
Serendipity*

*Welcoming  
Open  
Safe  
Friendly  
Responsive  
flexible*

***Feel it, see it, touch it, do it, play it, share it***

The drama of the world's best in the world's most dramatic natural landscapes

Multi layered - unique, new and different experiences

Involving – the ease in which to experience many different things

Stories and experiences – the more stories they have the more sharing they do



# NEW ZEALAND GOLF DEVELOPMENT: PROPOSITION



## PROPOSITION

- Build an aligned New Zealand golf story around **dramatic intensity: Experience and indulge in the intensity of the untouched.**
  - Contrast and diversity: Mountain courses with the contrasting snow background, geothermal, coastal, contextualising the course within the environment and local experience.
- Continue to **build reputation**
  - Tell stories and continue to build relevance of New Zealand golf: courses within the world's top 100, course designers and architects, building architects and designers, unique challenges and unusual experiences, PGA tournaments, players, coaches.
- **Build imagery**, photographs and experiences that reflect this proposition delivering overall more drama and intensity:
  - Focus on high intensity tee shots and close up action play shots
  - Utilise dramatic lighting
  - Build natural contrast, close up and distance elements
  - Include unique experiences – animals, geothermal, mountains
  - Photogenic potential for sharing/recording on social media.
- Include **references to premium and elite experiences:**
  - Indulgence and premium where possible: helicopters, art/sculpture
  - PGA and World Class golf, coaches, players, manicured greens.
- **Clarify accessibility and ease:**
  - Clarify accessibility of courses – public availability and how to access premium courses.
- Build a sense of **zero distance immersion:**
  - People, friends in the shots enjoying the experience together
  - Close up of the shots, challenges.
- Include a sense of **socialisation:**
  - People together playing and sharing after golf.

# DRAMATIC INTENSITY: A GOLF PLUS TRAVEL HOLIDAY



Experience and indulge in the intensity of the untouched

Raw  
New – one of the first  
Accessible  
Dramatic  
Among the best in the world



Attend a golf tournament  
PGA instruction

*Learning to fly*

*Raise a Sail - Sailing*

*Sky diving (self/tandem)*

*Hunting*

*Helicopter*

*Day-hike*

*Ski*

*Premium wine*

*Island hop on a yacht*

*Walk on ice –  
Glacier walk/Ice cave*

*Indulge in a thermal spa*

*Glacier milk lakes*

*Drive a campervan*

*Sleep under the stars*

**DRAMATIC IMAGERY**

*Lighting*

*Perspective*

*Contrast*



FORWARD

# CHINA GOLF

The segments

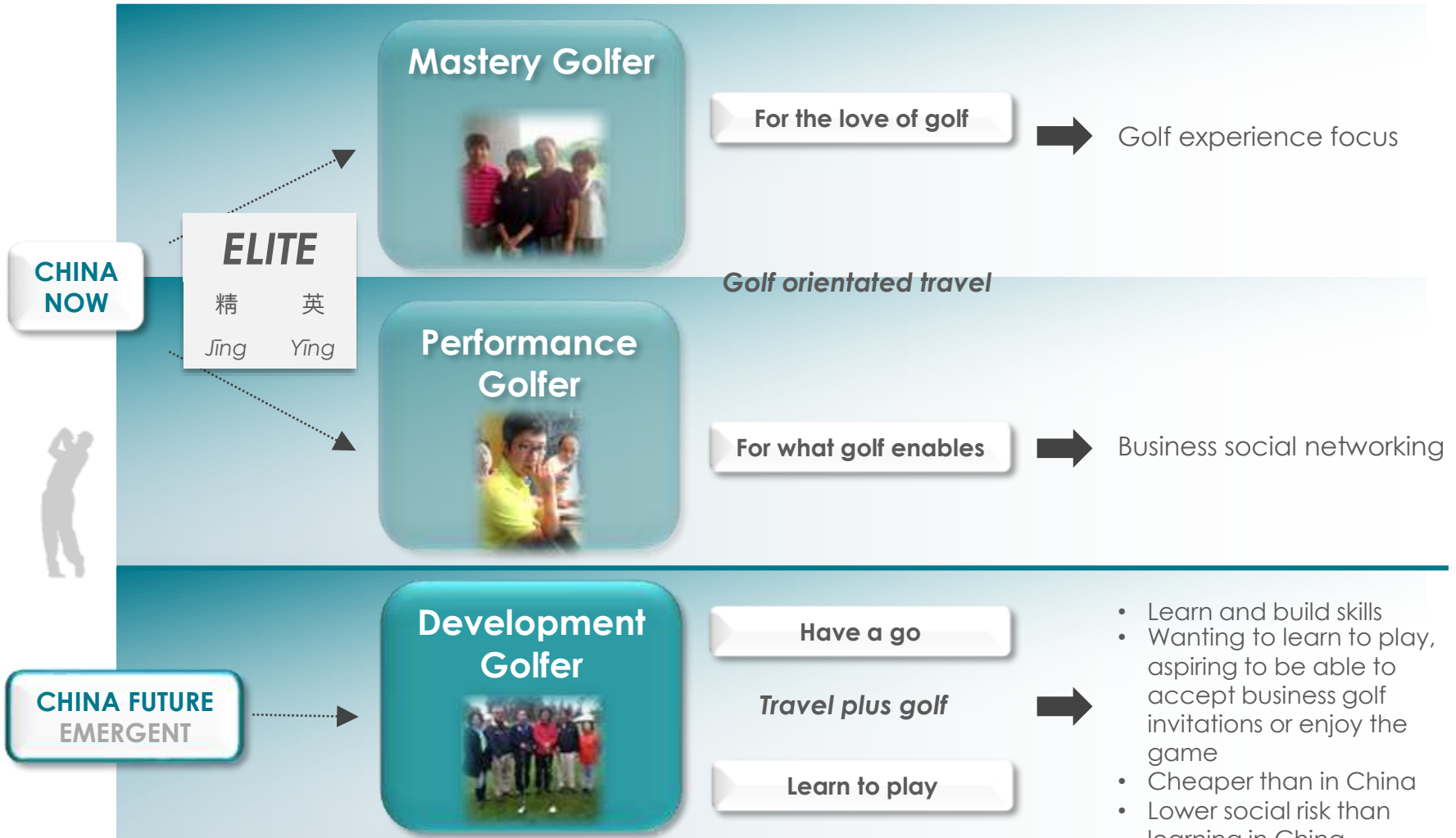


# GOLF IN CHINA: TARGET GROUPS **NOW**



→ Current golf travellers from China fall into two broad segments. Both are elite, heavily involved with golf in China and travelling and playing golf internationally frequently.

# GOLF IN CHINA: TARGET GROUPS **FUTURE**



# GOLF IN CHINA: TARGET GROUPS **FUTURE**





## ACTIVATION – in market

Build relationships and presence with premium golf clubs in China and their associated business organisations.

Sponsor golf tournaments in China, sponsor golf events showcasing New Zealand food, wine hospitality.

Promote New Zealand Golf open and international players attending.

Co-promote with complementary New Zealand tourism events e.g. New Zealand regional wine weeks – like Otago wines.

Engage with targeted golf club social media platforms, share their achievements, promote golf + travel itineraries, run competitions.



## DEVELOPMENT

Present golf course entrances and club facilities to international standards - refined excellence.

Provide premium resort style on-course experiences as a future development opportunity – accommodation, restaurants.

Foster and develop sector relationships with New Zealand trade and government sectors for international event and tournament opportunities.

Reception areas with halls of fame, and international links highlighting the stature of courses.

Bring New Zealand culture onto golf courses – architecture, sculptures, cultural shows.

Chinese speaking concierge staff available.

Premium high status activities and New Zealand golf travel.

Provide itineraries for non players and examples of experiences:

- Café – Relaxing areas to eat and drink

- Walking trails

- Free Wi-Fi in clubhouse.

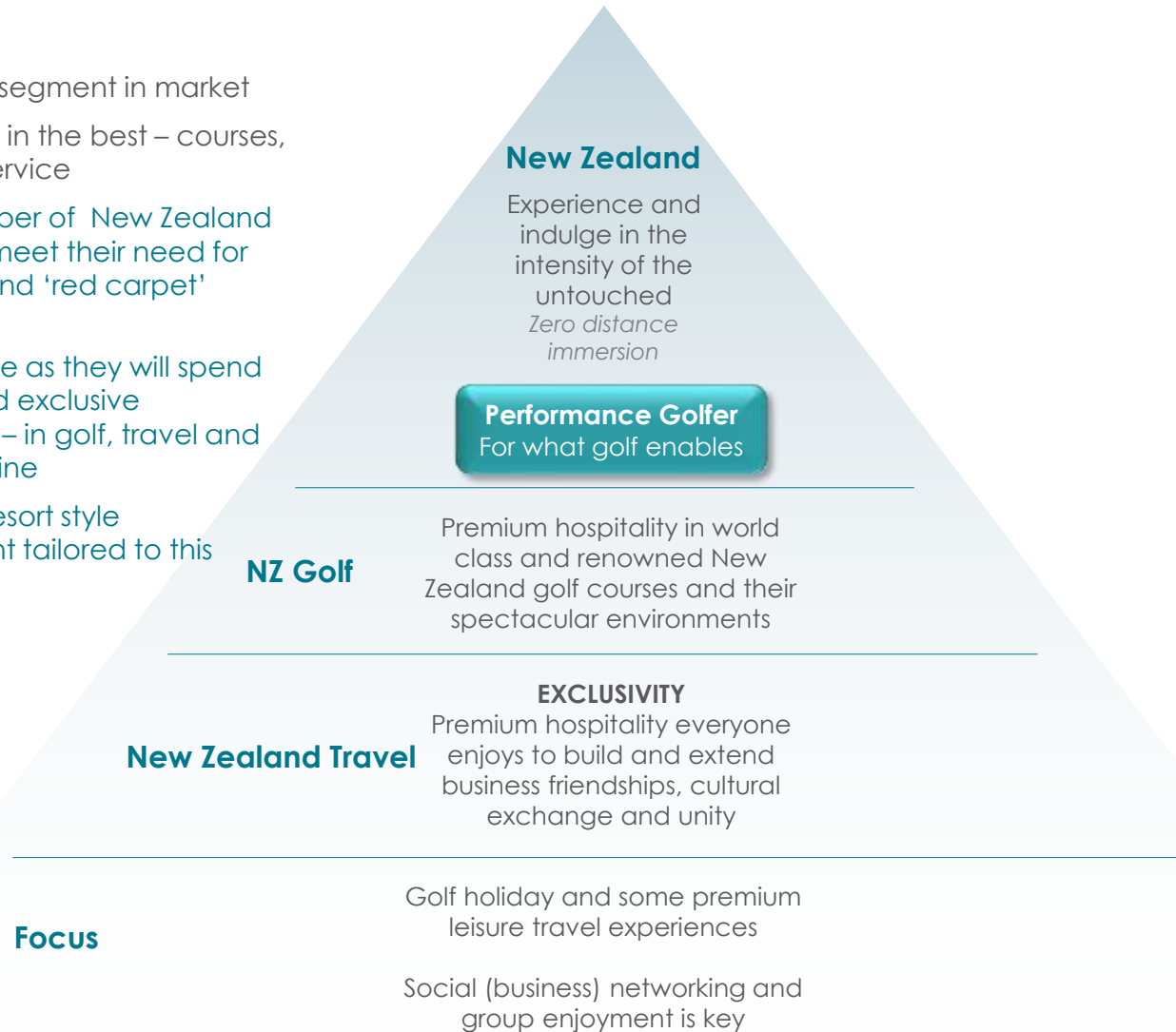
# PERFORMANCE NETWORKING GOLF SEGMENT



## Opportunity

A core current segment in market  
Only interested in the best – courses, experiences, service

- Limited number of New Zealand courses will meet their need for reputation and 'red carpet' treatment
- Very valuable as they will spend for great and exclusive experiences – in golf, travel and goods like wine
- Future golf resort style development tailored to this segment







# MASTERY EXPERIENCE GOLF SEGMENT



## ACTIVATION in market

Utilise Chinese golf club social media channels – run competitions, product give-aways etc. associated with golf events.

Sponsor local golf tournaments with integrated promotions of New Zealand products and experiences.

Send New Zealand PGA coaches to China for visiting training exchanges.

Promote golf tournaments in New Zealand – New Zealand open spectator and play golf packages, weekend stay and play tournaments.

Link Golf TV channel to key golf websites in New Zealand to activate planning process.

Provide New Zealand golf content to golf TV channels.



## DEVELOPMENT in New Zealand

Develop and bundle cluster trails/itineraries with golf app for New Zealand – North and South Islands.

Develop Mandarin QR codes: itineraries regionally, course information – safety, protocol, availability, booking, guidance on course, distance in feet, availability of carts.

Clear communication of the New Zealand golf opportunity – “top 100 courses”, challenges, variety, unique environments.

Golf course and golfing websites – up to date and information with online booking systems – available in Chinese language.

Emphasis of golf quality and diversity with ease and unique challenges.

Options for local off-site activities and tailored experiences – that are dramatic and special.

Develop regional local course network with information on access and unique experiences.



# MASTERY OVERALL PROPOSITION SUMMARY



## Opportunity

A core current segment in-market

Potentially very strong growth potential

Willing to play across course style, seasons and regions

→ Core to utilising New Zealand golf facilities and resources throughout New Zealand, building seasonal and regional visitation

## New Zealand

Experience and indulge in the intensity of the untouched  
*Zero distance immersion*

**Mastery Golfer**  
For the love of golf

## NZ Golf

Spectacular inspiring golf  
Top and unique and unusual courses and challenges with variety  
Immersed in the unique natural drama of New Zealand

## New Zealand Travel

### ENRICHMENT

Personal abundant and enriching travel experiences that indulge the senses in a dramatic way and expand their horizons

## Focus

Golf holiday with broader range of personalised travel experiences  
Great golf and travel experiences with associates, friends and family is key



# THE CHINESE DEVELOPMENT GOLF SEGMENT



## CHINA FUTURE DEVELOPMENT



## *Travel plus golf*

- Golf in China is such a young sport that this is currently an emergent opportunity – to be monitored for the future.
- Golf is aspirational for many Chinese FIT, but they do not currently have a connection with golf, do not understand how to play, the protocol involved and see it as a sport that is largely closed to those who do not belong to a club.
- This may change in the future.

### Barriers

Don't understand that New Zealand has public access courses.  
Don't understand 'how to' - protocol, rules and procedures, where to go, what to do.  
Limited English language – to understand how to navigate the opportunity.

### Opportunity

- Develop a strategy to communicate clearly in China and in New Zealand public course availability (without member invitation)
  - Consider an open to all symbol. Consider a Learn to Play Golf sign. Use outside courses, in promotional material.
- Develop Mandarin protocol information, ensure visually clear wayfinding signage (symbols not just words).
- Consider developing online/digital Mandarin information and course descriptions.
- Promote as a tourism activity to build local course usage regionally through a regional network.



# THE CHINESE DEVELOPMENT GOLF SEGMENT



CHINA FUTURE  
DEVELOPMENT

Travel  
plus golf



Have a go



**A tourism activity** – that is golf focused. Have a chance to experience golf in New Zealand.

- Easily accessible (relatively), fun and building a skill with low pressure.
- Less social risk and cost than playing in China as a beginner.
- Incidental opportunity to have a go at golf or have a casual round once in New Zealand.

*learn and  
build skills*

Learn to play



Looking for an opportunity to complete a short **Golf learn-to-play course** in an academy setting – golf focused course with other supplementary experiences

- Pre planned golf tuition and academy style programme
- With some travel experiences
- Famous/recognised golfing credentials.

# DIFFERENT LEVELS OF INDUSTRY ENGAGEMENT



Different clubs and organisations will have different levels of interest in developing for the China market, and timing for this. There are opportunities at all levels.

## China Ready

## China Activate

## China Focus

| Opportunity          | To utilise resources and maximize revenue in low demand periods during the day, week and season.  | To activate real value from passionate Chinese golfers who will pay for great experiences on a range of our courses   | To activate real value from passionate Chinese golfers and social networkers who will pay for great experiences on our premium courses  |
|----------------------|---|---|---|
| <b>Focus summary</b> | <ul style="list-style-type: none"> <li>• Build awareness that the courses are open to all 'public' and Chinese/ tourists are welcome.</li> <li>• Language – basic course instruction and protocol/safety in Mandarin.</li> <li>• Safety - any issues are in Mandarin print out.</li> <li>• Minimise disruption to other players – by timing access after or away from busy times depending on player skill.</li> <li>• Assess player skill to schedule to minimise disruption.</li> </ul> | <ul style="list-style-type: none"> <li>• <b>Enable:</b> Build Mandarin across all touch points - mainly on digital platforms (Golf sector and course focus).</li> <li>• <b>Welcome:</b> Build our welcome to Chinese players.</li> <li>• Enable the easy <b>integration of travel and golfing experiences</b> – with ease, drama and memorability.</li> <li>• <b>Develop our stories</b> – why, what, where is special, famous, unique.</li> <li>• <b>Enable social experiences</b> and challenges, tournaments, mini competitions.</li> <li>• <b>Build relationships</b> with courses and clubs and business associations in China.</li> <li>• <b>Activate social media</b> sharing personally and presence in clubs.</li> </ul> <p>Provide relevant food, hot water and flasks.</p> | <ul style="list-style-type: none"> <li>• Build resort style facilities including accommodation and food.</li> <li>• Invest in architects, sculpture, premium course design and location.</li> </ul> |

# DEVELOPMENT ACTIONS



## China Ready



## China Activate



## China Focus



|                                 |   |   |   |
|---------------------------------|---|---|---|
| <b>Experience focus</b>         | FIT travel holiday – with golf experience   | Golf holiday with opportunity for personalised travel experiences   | Premium golf experience and leisure travel enabling socializing   |
| <b>Awareness and connection</b> | Presence on New Zealand travel sites<br>Tourism information centres<br>Personal social media travel sharing | Strong network of golf clubs<br>New Zealand website presence<br>Golf travel agents<br>Social media – build sharing<br>Personal and club   | Well maintained relationships with a broad range of golfing and business sector groups and clubs<br>Specialist golf experience planners<br>Golf travel agents (golf courses use them to organise the trip)<br>Social media – sharing. Personal and club |
| <b>Signage and Information</b>  | Road front welcome(public access symbol)<br>Image based signage and directions                              | Visual icons indicating location of key amenities and services. Identification of hazards and safety considerations (no Chinese language signage) Pamphlets in Chinese if appropriate   |   |
| <b>Hospitality</b>              | Clear indication open to visitors and times   | Have people present to welcome guests.<br>Video introduction in Mandarin or English with Mandarin subtitles about the course (on line link)<br>Pamphlets<br>Welcome pack(soap, towel, flask for hot water, golf course plan and play guide) | The personal approach and welcome<br>Club president, status<br>Specific hole by hole course Information(how to play the hole, stories, photo opportunities, famous player stories)<br>Flags, welcome signage for tournaments                            |

# DEVELOPMENT ACTIONS



## China Ready



## China Activate



## China Focus



|                         |  |   |  |
|-------------------------|--|---|--|
| <b>Wayfinding</b>       | Visual symbols and icons<br>Golf plan and play – course introduction in Mandarin   | More DIY – self directed but informed<br><br>Golf plan and play – video with fly over   | Assisted. Personal golf concierge (Mandarin speaker) available on site   |
| <b>Chinese Language</b> | Course play and protocol in Mandarin   | Mandarin – web based course information, QR code link to language about the course, protocol, times, services.<br>Online<br>Written course pamphlet   | Mandarin available at all levels – personalised if required. Especially at the peak holiday season<br><br>QR code digital translating  |
| <b>Food + Beverage</b>  | Hot water<br>Glass of fresh milk<br>Instant noodles<br>Fresh Fruit – with a knife and plate available<br>Fruit smoothies(optional) | Addition of hot dish; rice or noodles preferred   | Extensive multi level offering. Café, a la carte, restaurant<br>Snack cart on the course – cold water, fruit, steamed buns, sticky rice pack for tournament days                     |
| <b>Equipment</b>        | Rental clubs, shoes, bag, flasks<br>Balls and tees   | Latest brands to buy or hire<br>Golf carts for hire( preferred ) – will walk<br>Branded pro shop gear(apparel, soap, sun visor, gloves, trophies, towels, balls and tees ) Sun lotion, sand fly repellent | Also more technology: golf carts, GPS watches to geo locate on course, ability to customize equipment to New Zealand conditions (change golf heads)<br>Stylish sophisticated apparel |

# DEVELOPMENT ACTIONS



## China Ready



## China Activate



## China Focus



|   |  |  |   |
|---|--|--|---|
| <b>Coaching and development</b>   | Package deal short and simple in English<br>Have a go at the basic shots, the clubs, the swing, protocol PGA or local level coaching | Customise coaching to individual needs<br>Mandarin option<br>Book in advance   | On demand PGA coaching<br>Mandarin option   |
| <b>Caddying</b>   | Not required   | Pre book option  | Available in Mandarin or GPS watch or enabled golf carts with instruction<br>Call back to reception if problems |
| <b>Pricing and packages deals</b>   | Package deal – e.g. equipment and coaching<br>Transport and golf play  | Give something free (small) e.g. 10% off at club house food and beverages or pro shop discount<br>Buy in the pro shop and a free tea<br>Discount for multiple rounds | Will pay a premium if the service and experience is there   |
| <b>Building serendipity</b>   | Public availability clearly marked<br>Local wildlife – visual signage<br>Geothermal, wildlife information                            | Plus: Challenge of getting under par at the most challenging hole<br>Joining a local event or competition  | Business and commercial exchanges with New Zealand/ China<br>Cultural exchange with locals                      |
| <b>Story telling</b><br>- note worthy – architecture players<br>- Unique experience | Local stories, local history   | Architectural significance, buildings and course and geographical/play challenges  | Famous, significant moments, architects, special holes  |



# DEVELOPMENT ACTIONS



## China Ready



## China Activate



## China Focus



|  |   |  |   |
|--|---|--|---|
| <b>Enhancing unique experiences</b>            | Opportunity to socialise with locals in club rooms – after the game you are welcome to share a beer | PLUS<br>Well stocked pro shop with service and technology<br>Logo goods<br>Coordinated itinerary with web cam recordings or real time<br><a href="http://www.magicmemories.com/">http://www.magicmemories.com/</a> | PLUS<br>Enabling private room functions for exclusive social events, hospitality and entertainment<br>Places where you can get loud or be discrete  |
| <b>Building networks – regional, national</b>  | Linked in to RTO websites<br>Linked to other similar courses as a network or cluster regionally     | Links to other golf courses in New Zealand, wineries, luxury lodges, Wi-Fi enabled booking<br>Regional and international links to other courses  |   |
| <b>Considerations – the needs of the group</b> | Awareness of public course access<br>Basic language information in Chinese – course and protocol    | Golf is the focus – they do not want to be distracted by long lunches, breaks in play  | Social interactions and opportunity for this is central, e.g. mini competition, dining areas close to end of play.<br>Premium ancillary services – golf linked Banquets, spaces for private socialisation, prize giving ceremonies<br>Special transport offers – exclusive helicopters, jeeps, luxury cars<br>Resort feel including leisure and wellbeing services in a private setting |



FORWARD

# SOCIAL / CULTURAL OPPORTUNITY



# SOCIAL CULTURAL OPPORTUNITY



Chinese are very interested in experiencing the  
New Zealand way of life

*'We want to live like a local – go to places  
they go'*



- There are opportunities to be guided through local communities, markets
- Telling local stories and history
- Tasting local foods and specialties

# SOCIAL CULTURAL OPPORTUNITY: MAORI



For most Chinese FIT, Maori cultural experiences are an interesting support activity

To deliver the greatest relevance and value Maori cultural experiences must:

- Be clearly experience led – underpinned by authentic cultural context and meaning.
- Deliver some language connection and understanding.

## Entertainment

Relevant for some  
e.g.: cultural show

Has dramatic entertainment value  
Has appeal as a show to some

Overview of ceremonial Māori culture:

- Traditions, preservation of culture
- Celebration
- Ceremonies
- Performances

Substantially misunderstood:

- Expectation it is going to be a real reflection of contemporary Maori life
- Difficulty in understanding commentary
- The more drama the less translation (speaker/headset/handout) is required
- Translation particularly important for children
- Useful: Pre written material, headsets before the performance

## Experiential Underpinned by culture

Most relevant  
e.g.: kayaking by Maori carving

- A genuine experience underpinned by the values and practices of local Maori has more integrity and is generally more activating
- The activity focus enables understanding of the experience deliverable – what they are getting
- This is a New Zealand experience with an underpinning Māori cultural perspective

## Cultural Lead Activity

Relevant if supported with Chinese language and an experience  
e.g.: a story telling of a land mark

- Can be difficult to understand
- Not tangible – about what the experience will be, how they will participate and what they will get from it

# SOCIAL CULTURAL OPPORTUNITY: MAORI



Experiential  
Underpinned by culture

Most relevant



Entertainment





## Building communication and understanding

It is very difficult for Chinese FIT visitors to understand whether Maori cultural experiences are real (visit a village they live in) or rather are a historic representation. Language is a barrier to understanding and appreciating Maori cultural experiences – especially those that are culturally anchored in story.

### Language options

Symbol signs  
Images/  
pictures

Hand outs/  
pamphlet  
with  
Mandarin  
translation

QR code link  
to translation

Audio head  
sets

Mandarin  
speaking  
guide



**FORWARD**

# ACCOMMODATION



# A DIFFERENT APPROACH TO ACCOMMODATION



Overall accommodation is often a means to an end – not an end in itself

Overall Chinese are looking for:

Predictable

Globally branded hotel chains – of different levels:

- Very clear what will be delivered
- Predictable cost and experience
- Predictable food
- Extremely easy to book through international aggregators.

→ A lack of availability can cause anxiety and is a hassle, requiring more involvement in planning.

Sociable and equitable

Being part of a group is being together. Sharing rooms is preferred as part of sociability – even to the very high end. Equity in level of room saves face and avoids hierarchical issues.

- We need more multi person room configurations, with equal decor standards e.g. enuites.
- Modular configuration with shared space.

Communal DIY Cooking facilities

Self catering is a positive part of a holiday experience. The ability to self cater in motels, serviced apartments, holiday camps, campervans is very desirable. This works well for the sharing group culture. Allows them to be loud.

- There will be strong continued demand for these facilities
- Respectful outlining of conduct expectations is important to maintain harmony.

Experiential special

Accommodation can be a must do in itself – if it is unique and delivers an experience.

*Create an experience beyond a room*

### Experience as “must do” in New Zealand

- A design theme/architect:
  - Renowned architect
  - Quality finishes
  - Easy to clean.
- A unique location – with an outlook or story.
- A link to the outside:
  - Gardens
  - Views.
- Star gazing, glamping, treehouse, birdwatching, forest views, coastal views, sunrise/sunset, playground, hot pool.





# A DIFFERENT APPROACH TO ACCOMMODATION



|  |   |
|--|---|
| Often willing to save on accommodation     | <ul style="list-style-type: none"> <li>• Accommodation is not the focus of the trip – sightseeing, activities and food are more important, will save on accommodation if they can.</li> <li>• Cheaper accommodation styles with self catering suit the group travel style:             <ul style="list-style-type: none"> <li>– Be aware \$\$ is not a main driver for choice and they will pay for value.</li> </ul> </li> </ul> |
| Groups are the norm                        | <ul style="list-style-type: none"> <li>• Will travel with groups from 4 – 20+:             <ul style="list-style-type: none"> <li>– We need to understand and cater to groups</li> <li>– Provide directions to experiences and food / restaurants that cater to groups well.</li> </ul> </li> </ul>   |
| Happy to share                             | <ul style="list-style-type: none"> <li>• Sharing and being together is preferred:             <ul style="list-style-type: none"> <li>– Providing flexibility and options with clear payment instructions is essential.</li> </ul> </li> </ul>   |
| Pre-booking not always a priority          | <ul style="list-style-type: none"> <li>• Pre-booking is greater for shorter, first time and heavy booking holiday seasons. Those with longer more flexible itineraries often are not pre-booking:             <ul style="list-style-type: none"> <li>– Build awareness if pre-booking is required to ensure availability</li> <li>– Incentives can be used to secure pre-bookings.</li> </ul> </li> </ul>                         |
| They will cancel if they get a better deal | <ul style="list-style-type: none"> <li>• A clear cancellation policy is important to ensure bookings are maintained.</li> </ul>   |
| Central and connected                      | <p>Ideally in a central area with walk to shops and town – up to 20 minutes from a main activity.<br/>Clear signage to indicate the accommodation location with GPS co-ordinates.</p>   |
| Cooking facilities                         | <p>Prefer gas cooking.<br/>Enough utensils for sharing across rooms – we need to work this out.<br/>Respectfully outline how we would like facilities left.</p>   |







# ACCOMMODATION



| ACCOMMODATION TYPE  | ROLE  | ISSUE  | OPPORTUNITY  |
|---|---|--|--|
| <p>Camper van</p>      | <ul style="list-style-type: none"> <li>• Total freedom and flexibility</li> <li>• Novel and unique – can't do it in China</li> <li>• Easier in New Zealand than in Europe</li> <li>• Cost effective</li> <li>• Zero distance with nature</li> <li>• Self cook – easy</li> <li>• Fun and new</li> </ul>  | <ul style="list-style-type: none"> <li>• More difficult than expected – windy roads, winter conditions, distances long tiring driving, operating the facilities – power, fuel, sanitisation, water</li> <li>• Cramped</li> <li>• Navigation – Critical that GPS has Mandarin option</li> </ul> | <ul style="list-style-type: none"> <li>• They do want to follow the rules – ensure instruction and rules clear and take time – Operating, navigation, camping rules and protocol, waste disposal, environmental care</li> <li>• Clearer itinerary/distance and time recommendations to reduce fatigue</li> </ul> |
| <p>Holiday park</p>    | <ul style="list-style-type: none"> <li>• Great for large casual groups</li> <li>• Good for sharing, communal food and accommodation</li> <li>• Open all hours</li> <li>• Enough hot water</li> <li>• Great value</li> <li>• Great travel ideas and tips from other travellers</li> <li>• Relaxed and casual</li> </ul>  | <ul style="list-style-type: none"> <li>• If it's not up to their desired standard they will simply choose somewhere else for the next night</li> <li>• They won't complain</li> </ul>  | <ul style="list-style-type: none"> <li>• Clear icon signage giving directions and locations</li> <li>• Mandarin handouts available for safety, rules and guidelines</li> <li>• Larger units with shared dining/socialising space and multi bedrooms</li> </ul>   |
| <p>YHA / Hostels</p>  | <ul style="list-style-type: none"> <li>• Sociable, casual, and traveller focused</li> <li>• Great advice and sharing for travellers</li> <li>• Inclusive and communal</li> <li>• Variety of room styles including shared bunk rooms and family rooms</li> <li>• Great value</li> <li>• Very happy with this quality and style of accommodation</li> <li>• Safe – with others</li> </ul> | <ul style="list-style-type: none"> <li>• Casual booking may result in lack of availability over peak times</li> <li>• Restricted reception hours can impinge on daytime sightseeing</li> </ul>   | <ul style="list-style-type: none"> <li>• There is potentially very strong demand in this style of accommodation. Shared rooms attractive</li> </ul>  |

# ACCOMMODATION



| ACCOMMODATION TYPE   | ROLE  | ISSUE  | OPPORTUNITY  |
|--|---|--|--|
| <p>Motels</p>   | <ul style="list-style-type: none"> <li>• Value shared accommodation with in room cooking facilities and bathrooms</li> <li>• Private, sociable, informed, shared</li> <li>• Information and assistance from the operators is helpful – a good understanding of local activities and area</li> </ul> | <ul style="list-style-type: none"> <li>• High variability in standards and facilities</li> <li>• Language challenges – with Chinese FIT visitors not always understanding protocol and expectations – sometimes have more people per room or rearrange furniture</li> <li>• Prefer gas to cook with</li> <li>• They will not complain</li> </ul> | <ul style="list-style-type: none"> <li>• Clearly outline facilities and expectations in written Mandarin and follow up if required</li> <li>• For cooking – gas, rice cooker and an electric or stove top deep pot for cooking hot pot e.g. electric frying pan</li> </ul> |
| <p>Serviced apartments</p>                                    | <ul style="list-style-type: none"> <li>• A great higher standard motel</li> <li>• Generally centrally located</li> <li>• More room and sleeping space with good cooking facilities</li> </ul>   | <ul style="list-style-type: none"> <li>• Chinese FIT visitors are not always aware of this option</li> <li>• Similar language – guideline requirements</li> </ul>  | <ul style="list-style-type: none"> <li>• Build awareness</li> </ul>  |
| <p>Bach / Holiday Home<br/>Bookabach<br/>Holiday Houses</p>  | <ul style="list-style-type: none"> <li>• Experience real New Zealand lifestyle/home</li> <li>• Stay in amazing locations</li> <li>• Authentic, unique experiences</li> <li>• Share facilities</li> </ul>  | <ul style="list-style-type: none"> <li>• May want to stay only one night</li> <li>• Don't understand the guidelines e.g. cleaning fees, leave it as you found it, turn off electricity</li> <li>• Can be difficult to find – get into</li> <li>• New Zealand DIY not always set up for tourists</li> </ul>                                       | <ul style="list-style-type: none"> <li>• Clarity to bach owners – the need for very clear, simple and comprehensive instructions with visual icons and pictures</li> <li>• If wanting to target Chinese consider translation of instructions and a bond</li> </ul>         |
| <p>AirBnB</p>   | <ul style="list-style-type: none"> <li>• Increasing interest in experiences that involve real homes</li> <li>• True variety, originality</li> <li>• An easy site to access from China and users understand the system</li> </ul>  | <ul style="list-style-type: none"> <li>• They may only want to stay one night</li> <li>• Don't understand the guidelines e.g. cleaning fees, leave it as you found it, turn off electricity</li> </ul>   | <ul style="list-style-type: none"> <li>• Clarity to AirBnB – the need for very clear, simple and comprehensive instructions with visual icons and pictures</li> <li>• If wanting to target Chinese consider translation of instructions and a bond</li> </ul>              |

# ACCOMMODATION



| ACCOMMODATION TYPE  | ROLE  | ISSUE  | OPPORTUNITY  |
|---|---|--|--|
| <p>Glamping</p>        | <ul style="list-style-type: none"> <li>• An opportunity to sleep in nature and camp in comfort which is not possible in China</li> <li>• Can camp in amazing places</li> <li>• Unique, relaxed</li> </ul>   | <ul style="list-style-type: none"> <li>• May only want to stay 1 or 2 nights</li> <li>• Cooking options need to be clear – ideally with an option to self cook with local ingredients</li> <li>• Locating glamping options when using aggregators in China</li> </ul>                        | <ul style="list-style-type: none"> <li>• Chinese/Asian flavour pantry box: vinegar, soy, cooking oil, chilli</li> <li>• Network throughout New Zealand</li> <li>• Experience themes e.g. farming, Hobbits, yoga, mountain, lake</li> <li>• To set up in more isolated regions as natural environment experience “must do”</li> </ul> |
| <p>Hotels</p>          | <ul style="list-style-type: none"> <li>• The familiar backstop</li> <li>• Easily available on Chinese aggregators</li> <li>• 5 star is not necessary for most, but desirable for some</li> <li>• 3 star is too low and will check other options</li> </ul>    | <ul style="list-style-type: none"> <li>• Not enough familiar brands in main towns/cities</li> <li>• Concierge – not speaking Mandarin and not being completely familiar with local surrounds, activities, and food options</li> </ul>  | <ul style="list-style-type: none"> <li>• Develop more 5 star hotels</li> <li>• Improve concierge knowledge in New Zealand</li> <li>• Maintain Mandarin staff</li> <li>• Mandarin entertainment at night – Chinese TV</li> </ul>  |
| <p>Luxury Lodges</p>  | <ul style="list-style-type: none"> <li>• For a select premium audience</li> <li>• Value boutique specialist experience</li> <li>• Want premium seafood including New Zealand crayfish</li> <li>• Want close, associated activities and experiences</li> </ul> | <ul style="list-style-type: none"> <li>• Variability in what is termed luxury in New Zealand – some are boutique, not up to this standard</li> <li>• Prefer contemporary architecture as premium – not “American cottage/ lodge”</li> <li>• Too quiet for comfortable socialising</li> </ul> | <ul style="list-style-type: none"> <li>• Architecturally designed – contemporary global style</li> <li>• Premium New Zealand seafood available</li> <li>• Unique accommodation experiences e.g. star gazing, tree house, cave, alpine, geothermal, star, coastal view</li> </ul>   |



**FORWARD**

# SECTOR ENABLERS



# VISAS IMPACT DECISION MAKING



## Tourist visas impact on decisions to travel

### Visa requirements

- Tourist visas are often seen as expensive, time consuming and difficult to get. Some countries are recognised as 'better' than others, in that their visas are easier to obtain, require less lead-in or processing time and are valid for longer.
  - The cost of the New Zealand visa itself is not seen as a barrier, and the time needed to apply for it is not an issue.
  - The translation costs involved in applying for visas can be perceived as very high and this is the most significant cost concern. Time also sometimes needs to be taken to personally get the visa, often travelling across town, and this is perceived as a hassle.
- An 'easier visa' will put a destination higher on the list and currently New Zealand is performing favorably in this regard.

### Impact of visa on travel decisions – multi-entry means multi-trips

- With a visa in hand the traveller will often do repeat visits to the country to make the most of it while they have the visa *"I have been to the States twice this year – because I have the visa – I want to make the most of it"*.
- Having a visa that allows time for repeat visits presents more opportunities.





# VISAS

Getting a New Zealand visa clears the way for probable travel and the multi-entry visa encourages multiple trips. Chinese are more likely to buy air tickets once they have their visas.

## Online Visa Applications

- Makes the process easier and is more convenient
- Can apply 24/7 from home/work
- Removes involvement of a travel agent/third party
- Turnaround of visas faster → enabling more spontaneous travel decision makings
- RISK of greater identity theft. Consideration must be given to the management and verification of the identity on visas, e.g. potential for introducing biometric fingerprinting, iris scanning etc.



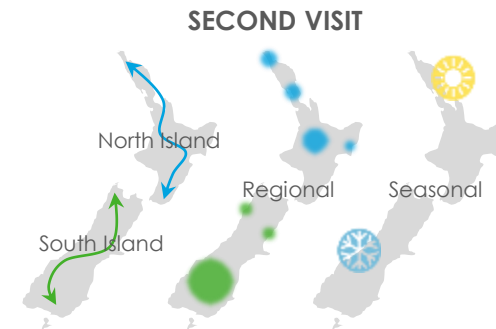


# VISAS – MULTI ENTRY

## Multiple Entry Visas

- Highly appealing to Chinese FIT.
- Remove a huge barrier to travel – i.e. the hassle of having to re apply for a visa.
- Considerably increases likelihood of more return visits – many holders are already on (or planning) their 2<sup>nd</sup> or 3<sup>rd</sup> trips to New Zealand.
- The preferred duration for multi-entry visas is longer than the current two years, with five years or more being optimal. The USA is seen as the “gold standard” in this regard.
- Longer duration multi-entry visas would also encourage more special interest tourism and regional tourism as Chinese make repeat visits to New Zealand.

→ The longer the duration of the multi entry visa, the more likely Chinese FIT are to plan multi trips into the future – especially if the experience promises are different for different regions, seasons, special interests – or across different styles of travel.





# THE MULTI ENTRY VISA THE STOP OVER – FUTURE

- A potential growth opportunity in the future: a two day stopover in New Zealand...
  - Enabled by multi-entry visa
  - Chinese stop for two nights on the way to:
    - A Pacific Island
    - South America.
  - *“I want to go to Rarotonga – I can now go through New Zealand; stay a couple of nights and then head to the Pacific Islands.”*
- Part of entry – stop over experiences:
  - Short contrast break in New Zealand – e.g., Waiheke Island two nights.
- Multi entry visa offers substantial Pacific tourism opportunity:
  - Experience:
    - Exotic
    - New discovery
    - Untouched
    - Not “too many Chinese” tourists – yet.
  - Target:
    - Not first time visitors
    - Among the adventurous and experienced target
    - More likely to be interest from self employed (time)
    - Individuals and friendship groups.





# BIOSECURITY

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- Visitors are very open to multiple touch points communicating biosecurity requirements.
- There is an appreciation that New Zealand is a country that is relatively untouched and committed to protecting the environment – this is one of the reasons Chinese want to come here.
- Many Chinese have no comprehension of how strict our biosecurity requirements are before coming and do want to be informed. They seek to follow the rules.
- Receiving information on government requirements/laws at the same time as visas are issued is seen as appropriate.
- In addition, Chinese FITs would be receptive to such information being supplied:
  - On the official website – clearly
  - On the plane coming to New Zealand
  - At the airport
  - Any reminder is appreciated.



In general, there is a lack of understanding among Chinese FIT about what the i-SITE service and facilities offer. The more sophisticated and experienced travellers have seen this type of service in other countries – but not all are aware.

## **Barriers**

- Not expected to be free – so many Chinese FIT don't even approach i-SITEs.
- Not recognised as public information, non-partisan service.
- Not expected to have Mandarin staff or information – and many are not confident to go in.
- May not know whether the service is localised only to the place they are currently in, or realise they can use i-SITEs for national planning and booking.

## **Opportunities**

- Promote the service at all opportunities in Mandarin :
  - With visas, on airlines, on national websites, at airports.
- Utilise Mandarin blackboards outside the i-SITE locations, welcoming people in and explaining free assistance for all visitors is offered.
- Potentially provide a regional language support service to assist local operators with Mandarin - resource collaboration.
- Provide readily accessible basic information, e.g.:
  - temperature, rain, how many layers of clothes
  - road conditions – open or shut
  - last minute specials and deals.



Help in Mandarin



Well trained/  
knowledgeable  
Mandarin  
speakers

**LANGUAGE  
ACCESS**

NAVIGATION  
To great experiences

**VIRTUAL CUSTOMER HELP**

Remote call to an i-SITE for assistance or 0800 China i-SITE line(booking, planning) in Chinese language

Enable intuitive navigation

- To aspects of interest



**Virtual search in Mandarin**

- Geo location
- Theme and interest
- Time available
- Time of day

**Black/board signage**

- Mandarin speakers inside
- Free Service
- Outside on side/walk



**Comprehensive Advice**

- Personal
- Quirky
- Unique
- Inter-regional links

OPTIONS

| Activities and Product  | Sightseeing and Places   |
|---|--|
| Kayaking<br>Bungee Jumping<br>Horse Riding<br>Cycling<br>Museums<br>Farmers Markets<br>Sailing on the harbour<br>Golf | Photos<br>Views<br>Sunrise<br>Walks<br>Local "haunts" –<br>coffee, bar, playground,<br>markets<br>Local interest |



**FORWARD**

# APPENDICES





FORWARD

# APPENDIX SOCIAL MEDIA





# BAIDU – SEARCH ENGINE

## What

Top Search Engine in China

手机百度 Baidu

www.baidu.com

## Closest Equivalent to:

Google

## Usage

Mobile App has 190 million users per month

Chinese use it to get into travel sites including the NewZealand.com site

Chinese use travel sites for awareness, not for credible user generated content





# WE CHAT – SOCIAL MEDIA CHAT APP

## What

微信 WeChat weixin.qq.com/

## Closest Equivalent to

Facebook timeline  
WhatsApp

## Usage

We Chat was the most active social platform with monthly average users of **556.48 million (July 2015)**

Chinese use it for co-ordinating and finalising travel plans, inspiring travel itineraries, sharing moments and photos and videos. Has a built in QR scanner for sharing and shake mechanism for push messages and coupons from promoters. Translation option.







# WE CHAT - EXAMPLES OF TRAVELLERS' POSTS



Paris Posts

**BRAGGING RIGHTS**

Paris Le grand 很贴心, 巧克力香橙一个不能少。每天小惊喜不断! 俩吃货为庆祝情人节, 排队也要吃回百年老字号甜品, 甜蜜蜜! 最浪漫的城市, 感受情人节浪漫的气氛.....

FOR

New Zealand – Photos photo shopped post travel – two different seasons by two different friends ,same view and posted on We Chat.

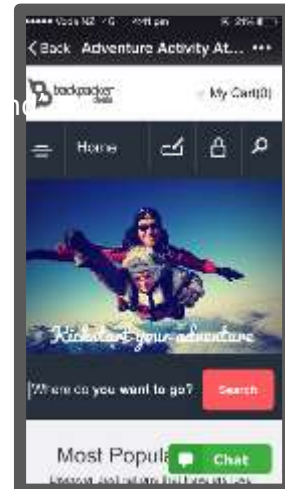
**CONTRASTS**



**HELPING OTHERS**



**Discount sites**





# WE CHAT – EXAMPLE OPERATOR POSTS



spark NZ 2:34 51%

< Back Fox冰川小镇资讯



Fox冰川小镇资讯

穿着好有我们提供的步行用皮靴和其他装备，登上直升机开始第一段飞行——飞越低处冰瀑的顶峰。这部分冰川处于持续运动的状态中。壮观的高处冰瀑和维多利亚瀑布在眼前一览无遗。该瀑布是由隐蔽的维多利亚冰川融化而汇聚成的。而后直升机将带你着陆冰川。

FORWARD

Spark NZ 3G 下午12:35 51%

< WeChat (2) Fox冰川小镇资讯

下午12:32

### Fox Trail 冰川前缘赏景

9月4日



冰川前缘赏景是一段老少咸宜的、既增长见识又从容闲适的行程。让我们的向导带领你一同去看看冰川吧~

Read All >

# SHARING ON SOCIAL MEDIA

---



→ Two key sites – Qiongyou: [qyer.com](http://qyer.com); Mafengwo.cn

**These sites have user generated content.** They therefore act as a direct and unbiased bridge between the consumer and supplier of the travel experience, and give the smaller operators a presence in the Chinese itinerary planning process.

The links can go directly to operators' websites **or** through booking agents like C-Trip etc.

To further encourage direct bookings and trust, having a Chinese booking engine on your site is preferable but not essential. An incentive to book is expected.

# MAFENGWO

## ITINERARY AND TRAVEL DIARIES

---



### What

[www.mafengwo.cn](http://www.mafengwo.cn)

A leading platform that lets people share and review their travel experiences online to drive independent travel decisions. It bridges the gap between traveller and supplier.

### Usage

80 million-plus users, 80% are users of its app. Some 60 million of them are active monthly users, and the site generates 16 million reviews per month.

### They Share

Duration of travel, detailed itineraries, driving routes, photos, kilometres to places, special areas of note, serendipitous moments, places to eat, sleep and buy things.

Two types of people use it – one type are the resource contributors who post their experiences and recommendations on accommodation, food and activities with website recommendations. The other type are travellers wanting to use the information to guide their itinerary planning.

# MAFENGWO

## ITINERARY AND TRAVEL DIARIES



Chinese look for popular posts, that are most like what they are wanting to do, how they like to travel, as a family or friends group, budget, activity type etc.

Key Opinion  
leaders  
(KOL) of  
travel  
itineraries

**马年出游第一站——新西兰自驾游**

作者: 就爱游 回复: 就爱游 15-09-25 08:51

去过新西兰的朋友都说新西兰很美很好玩, 于是我们马年出游计划的第一站就选择了新西兰自驾游。四月中旬我们四人结伴从广州出发, 经11小时的航程到达了新西...

43195 255

**Number of people who have accessed the review**

**Number of people who commented**

**Number of people who like this review**

**Kris爱旅行 • 追逐新西兰南岛的夏季**

作者: Kris 回复: snow and moon 15-09-25 03:34

纵使 新西兰 一直都如天堂般的存在在南太平洋上, 但是三年前, 不管在我的脑海里还是在我的旅行计划里从来没有出现过这个国家。不过, 自从我的bf奔在新加...

20826 218



就爱游(广州) 2014-05-07 22:10:05

只看楼主 回复

LV.30

时间 2014/04/12

人物 家族出游

人均费用 13000元

VIP

形式 自驾

+关注

**Importance of WOM**



这篇游记豪迈地提到了:

Oaks Shores Hotel(奥克斯海滩酒店), Airport Lodge Motel, Hermitage, 宜必思酒店, YHA Mt Cook (库克山国际青年旅舍), Apostles View Motel, Pinewood Lodge (松林别墅), Willowbank Motel (柳岸汽车旅馆), Scenic Route Motor Lodge (景观道路汽车旅馆), Pete's Farm Stay



# MAFENGWO ITINERARY AND TRAVEL DIARIES

Mafengwo is user generated.

Getting linked is critical to getting a direct booking.

It is easier to get linked if your information is on a QR code.



凯库拉@Brook House B&B, 100万含早 (1大床)  
 booking.com可定  
 优点: 性价比太高了! 感受妈妈的早餐。不足: 离镇上开车10分钟, 算有点

Westport@The Steeple B&B, 130万含早 (1大床1小床)  
[www.steeplescottage.co.nz](http://www.steeplescottage.co.nz)  
 优点: LP好评无数, 无敌3面foulwind cape海角海景, 开满鲜花的院子。大是离westport镇上10多公里, 享受远离人世的海角生活吧!





# PROVIDING LINKS

Once they come through to your web page link – you can then give the option of accessing your information in Chinese through a familiar social media platform – Weibo or Youku (below).

*An example of a New Zealand organisation inserting Chinese social media links on their web site*



Show the  
youku  
kaikyra  
site



# TYPES OF ASSISTANCE

## WHAT CHINESE ACCESS ON THESE SITES?



This further demonstrates the need to be linked and shared. Some of these Chinese FIT visitors will use ONLY MaFengwo and Qiongyou as their resources.

*Examples of useful websites listed on the KOL itinerary*

基本在这几个网上查找预定的，我们基本预定的大部分都是家庭式的二卧室汽车旅馆，基本都带有厨房，这样的房型一般都有一个比较大的厅，有沙发和饭桌，做饭和吃饭都方便，而且价格也便宜。

携程网: <http://www.ctrip.com/>

环球旅居: <https://zh.airbnb.com/>

到到网: <http://www.daodao.com/>

缤客网: <http://www.booking.com>

雅高达: <http://www.agoda.com>

ASIWEB网: [http://www.asiawebdirect.com/zh\\_cn/](http://www.asiawebdirect.com/zh_cn/)

六、资料准备参考:

1.新西兰旅游局官网<http://www.newzealand.com/cn/>上很多实用信息，建议一定好好利用

2.新西兰各处的潮汐预告，新西兰很多景点都需要事先了解潮汐时间才能看到:

<http://www.niwa.co.nz/services/online-services/tide-forecaster>

3.新西兰天气查询:

<http://www.metservice.com/towns-cities/christchurch/christchurch>

4.新西兰道路信息: 可以提前了解新西兰主要公路路况，每日更新。 <http://www.nzta.govt.nz/traffic/current-conditions/highway-info/road/8373/south-island.html>

七、手机卡: 在基督城机场购买的Vodafone(沃达丰), 59纽币, 2GB流量, 200条短信、120分钟国内国际通话, 60天有效, 不用剪卡大小卡都可用, 要WCDMA手机才可使用, 在新西兰四个人就靠这张卡了。

八、保险:

慧择网的大众保险

[http://www.hzins.com/product/detail-830.html?pv=1-806-1567\\_564\\_1--](http://www.hzins.com/product/detail-830.html?pv=1-806-1567_564_1--)

# AN ITINERARY PLANNER



| 天数 | 星期        | 行程   | 费用      |      |       | 其他   |
|----|-----------|--|---------|------|-------|--|
|    |           |  | 项目      | 币种   | 人民币   |  |
| 1  | 星期五<br>11 | 广州→奥克兰 (Auckland)  | 国际机票    |      | 18500 | 含税: 8100元人民币/人, 2人   |
|    |           |  | 新西兰国内机票 | 227  |       | 捷星航空: 2人来回机票   |
|    |           |  | 保险      | 229  |       | 110元人民币/人, 2人  |
|    |           |  | 驾照公证    | 218  |       | 1人   |
|    |           |  | 签证费     | 1100 |       | 家庭签, 2人  |
| 2  | 星期六<br>12 | 奥克兰 (Auckland) → 基督城 (Christchurch)  | 手机卡     | 50   |       | 沃达丰2GB流量, 200条短信, 120分钟国内国际通话, 60天有效, 不同手机大小卡都可, 需VISA手机才能使用, 4人使用 |
|    |           |  | 住宿      | 909  |       | 基督城Airport Lodge Hotel (机场个屋汽车旅馆), 二卧室套房, 4人                       |
| 3  | 星期日<br>13 | 基督城(Christchurch) → 凯库拉 (Kaikoura)   | 租车      | 641  |       | 丰田TOYOTA ALLIUM, 租车10天, 保险全险费用                                     |
|    |           |  | 住宿      | 145  |       | 凯库拉Hilohohi Hotel (房车汽车旅馆), 二卧室套房, 4人                              |
| 4  | 星期一<br>14 | 凯库拉 (Kaikoura) → 格雷茅斯 (Greymouth)  | 海鲜团购    | 100  |       | 淘宝手机费5港币/人, 新西兰100元, 4人  |
|    |           |  | 海鲜      | 320  |       | 80港币/人, 唯两餐交收船长, 4人  |
|    |           |  | 加油      | 44   |       | 4人   |
|    |           |  | 住宿      | 790  |       | 格雷茅斯Apouton View Hotel (房车汽车旅馆) 二卧室套房, 4人                          |
| 5  | 星期二<br>15 | 格雷茅斯 (Greymouth) → 潘纳岩 (Panake Rocks) → 豪斯哥山 (Hokitika) → 弗朗兹约瑟夫冰川 (Franz Josef) → 福克斯 (Fox Glacier) | 加油      | 45.1 |       | 4人   |
|    |           |  | 住宿      | 1100 |       | 福克斯: ReloForest Hotel (房车汽车旅馆), 二卧室套房, 4人                          |
| 6  | 星期三<br>16 | 福克斯冰川 (Fox Glacier) → 马瑟森湖 (Lake Matheson) → 哈斯特 (Haast) → 瓦纳卡 (Wanaka)                              | 加油      | 55   |       | 4人   |
|    |           |  | 住宿      | 170  |       | 瓦纳卡: Wanaka Hotel (瓦纳卡酒店), 双人房, 89港币/间 /2间                         |
| 7  | 星期四<br>17 | 瓦纳卡 (Wanaka) → 拼图世界 (Puzzle World) → 箭镇 (Arrowtown) → 皇后镇 (Queenstown)                               | 自驾租车门票  | 56   |       | 14元港币/人, 4人  |
|    |           |  | 住宿      | 1740 |       | 皇后镇: Oaks Shores Hotel (奥克斯海岸酒店), 二卧室套房, 4人                        |
| 8  | 星期五<br>18 | 皇后镇 (Queenstown) → 格林诺奇 (Glenorchy) → 皇后镇 (Queenstown)   | 皇后镇租车   | 100  |       | 27港币/人, 4人   |
|    |           |  | 住宿      | 140  |       | 皇后镇: Pinewood Lodge (格林诺奇), 三卧室套房, 4人                              |
| 9  | 星期六<br>19 | 皇后镇 (Queenstown) → 克伦威尔 (Cromwell) → 特威迪尔 (Twizel) → 普卡普卡湖 (Lake Pukaki) → 米尔沃 (Mt)                  | 加油      | 60   |       | 4人   |
|    |           |  | 住宿      | 470  |       | 米尔沃: Mountain Lodge, 三卧室套房, 4人                                     |





# QIONGYOU – E.G. ITINERARY BUILDER

## PLACES

选择目的地

世界 > 大洋洲 > 新西兰 > 新西兰南岛

-  **基督城**  
Christchurch  
12%人还会去， 7382人去过
-  **蒂卡普湖**  
Lake tekapo  
8%人还会去， 6042人去过
-  **皇后镇**  
Queenstown  
7%人还会去， 8011人去过
-  **瓦纳卡**  
Wanaka  
4%人还会去， 4000人去过



Click

我的行程




- 新西兰(出发)
- 46,023 km
- 基督城 - 1次
- 46,181 km
- 蒂卡普湖 - 1次
- 46,184 km
- 皇后镇 - 2次
- 47,104 km
- 新西兰(结束)



HOW MANY NIGHTS?

Recommended sites with different price points

第1天(入住) - 第2天(退房) 基督城

|   |  |  |
|---|--|--|
|  |  |  |
| 五星级好评<br>Barnet House Backpackers   | 五星级好评<br>Rosewood Court Motel  | 五星级好评<br>Ramada Suites Christchurch City   |
| 酒店星级与评价 <b>★★★★ 8.29分</b>   | 酒店星级与评价 <b>★★★★ 8.80分</b>  | 酒店星级与评价 <b>★★★★ 8.60分</b>  |
| 参考价 <b>CNY 145</b>  | 参考价 <b>CNY 480</b>   | 参考价 <b>CNY 537</b>   |
| 含 WiFi 接送机服务 四脚车房 自行车   | 含 WiFi 接送机服务 四脚车房 自行车  | 含 WiFi 接送机服务 四脚车房 自行车  |

# CLICK THEN GOES THROUGH TO THE BOOKING.COM AGGREGATED SITES



**Review:** Group travel, six people shared a room, one night, "you can see Lake Tekapo even when cooking in the kitchen..."

**9.2 近乎完美**

休闲旅行 朋友团组 6床混合宿舍间的1张床位 人住了1晚

+ 在厨房里烧饭都可以看到蒂卡波湖

Booking.com 缤客

NZD 最近浏览记录 我的收藏 管理预订 登录

合作伙伴

穷游 非普通之旅

首页 → 新西兰 → 特卡波湖的酒店 → 特卡波湖国际青年旅舍  
3,322个住宿 27个住宿

保存至心愿单列表  
已被保存至收藏列表 204 次

YHA Lake Tekapo (特卡波湖国际青年旅舍) ★★★★★  
3 Simpson Lane, 7999 特卡波湖, 新西兰 - 显示地图

现在预订

可供预订的客房 设施 订前必读 预订须知 真实住客点评值得信赖

非常好 8.3/10  
★★★★★  
分数来自213条评论

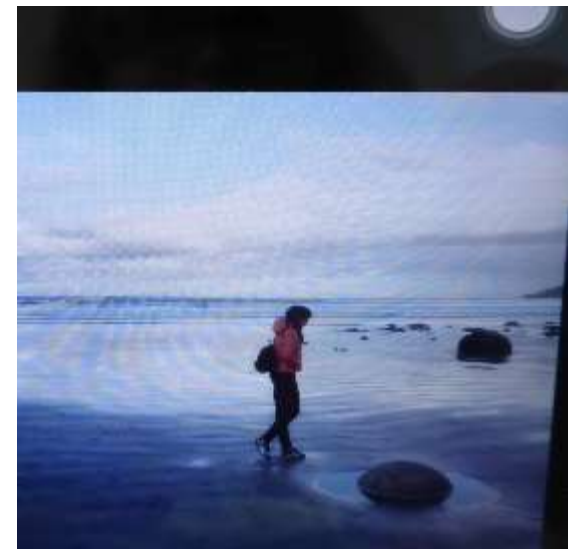
Last rating

# POSTING PHOTOS



## BRAGGING RIGHTS

Including a logo in photos is a great opportunity for others to connect into.





# WEIBO

## What

### Micro-blogging site

微博 Weibo weibo.com

Can advertise on here.

### Closest Equivalent to:

Twitter

114 characters in Chinese translates into 434 characters in English, well beyond the text limit of a "tweet" in English - more like a blog platform.

## Usage

Monthly average users 212 million for June 2015.

Small but important differences in the platform have made some say it is a Twitter clone, but better. For example, unlike Twitter, Sina Weibo allows users to post videos and photos, comment on other people's updates, and easily add comments when re-posting a friend's message.

Used for celebrities, KOL travel stories.

FORWARD



Weibo users can scan the QR code and upload onto the 100% Pure New Zealand App on We Chat to start receiving messages and content and share to others and keep it on their phones





# AGGREGATORS

## C- Trip

Biggest Aggregator in China

Also:

- Qunar.com
- Booking.com
- TraQyer.com

## Other Aggregators

**Alitrip.com** – A new emerging company in the travel booking market in 2014.

- Ly.com
- Baicheng.com
- Woqu.com



LY.COM





FIT – Pre-Organised Self Drive Trips - strong call to action - on promotion

### WoQu.com website – a 9 day 8 nights touring route

**It is a curated self drive tour and on promotion.** The itinerary is fixed and has attractions already booked. It starts on 28 September. It has a strong call to action - if you miss it you have to wait for the next promotion at that price.

Its good for less confident travellers who want to self drive and not go on a package tour but still know their budget.

There is space  
for feedback  
and reviews

**二次确认** 【深度自由行】 【9月28日国庆超值劲爆价】 【奢华享受】 新西兰南岛冰川峡湾 自驾游9天8晚

基督城（克赖斯特彻奇）出发 9天8晚 福克斯冰川 约瑟夫冰川 皇后镇冒险活动 TSS厄塞斯劳号蒸汽船 米尔福德峡湾巡航



- 9天全程自驾南岛，让你深度体验新西兰自然之美
- 南岛西岸冰川 精华自驾，让你感受最美的沿海6号公路的壮观
- 皇后镇天空缆车和过山滑板车过瘾体验，让你一次玩个够

0人评价 ★★★★★

新品首发，等你来点评~

支持旅游白分期 NZD **2272**起 [查看详情](#)



# ITINERARY TOOL PLANNER – QIONG YOU



[https://translate.googleusercontent.com/translate\\_c?depth=1&hl=en&prev=search&rurl=translate.google.co.nz&sl=zh-CN&u=http://plan.qyer.com](https://translate.googleusercontent.com/translate_c?depth=1&hl=en&prev=search&rurl=translate.google.co.nz&sl=zh-CN&u=http://plan.qyer.com)

[穷游](#)
[Destination](#)
[Advice](#)
[Travel assistant](#)
[Community](#)

Search Engine  
Specify travel  
period, month  
and by  
activities



[Hotels](#)
[Booking](#)

Selected conditions: [Destination: New Zealand](#)

[Travel days: 8-14 days](#)

Travel time: [January](#) [February](#) [March](#) [April](#) [May](#) [June](#) [July](#) [August](#) [September](#) [October](#) [More](#)

Travel theme: [Gourmet](#) [Humanities](#) [shopping](#) [sightseeing garden](#) [island beach](#) [scenery](#) [MICE](#) [Honeymoon](#) [+ Multiple choice](#)

Essence Level:

[Default sort](#) | [Views Up](#) | [Copy the highest number](#)

2000+ articles

Number of  
travel days you  
wish to go for  
and see what  
you can do or  
compare if you  
want to add  
more days

**14** days | 2015-04-04 Departure  
 [2015] found that Ne...

By car

• Guangzhou • Auckland Christchurch  
 Kaikoura • • Punakaiki Greymouth

[fish sweeping the road](#) | 124 | 24

**14** days | 2015-03-14 Departure  
 Guangzhou - New Ze...

• Guangzhou • Auckland Christchurch  
 Arthur Pass National Park • •

[Baichang Kai](#) | 1162 | 98

**11** days | 2015-02-03 Departure  
 Niubi trip to New Zea...

Auckland • Rotorua Taupo Wellington •  
 Christchurch • Kaikoura Lake

[Isy19830624](#) | 1831 | 86

# ITINERARY TOOL PLANNER – QIONG YOU



A KOL prolific poster  
about his travel itineraries on Qiong You



Number of views  
of his itinerary





# ITINERARY TOOL PLANNER – QIONG YOU

A KOL prolific poster of his travel itineraries on Qiong You

New Zealand →

Plus other countries he has travelled to. Widely travelled, so experienced in travel itinerary planning.

The screenshot shows a user profile on the Qiong You platform. The profile name is 'squal1017' with a level of 1 and 1 bag address. The user has 6 followers and 120 items to be replied to. The main content area displays a list of travel itineraries, each with a thumbnail image, a duration (e.g., 14 days, 13 days, 9 days, 12 days, 13 days), and a title. The first itinerary is for 'new Zealand' (14 days, 2014-05-25 departure), which is circled in black. Other itineraries include 'Greece and Italy Reference' (13 days), 'Thailand Tour (sample itinerary)' (9 days), 'Greece and Italy 2' (12 days), and 'New Zealand 2014 eleven lines 13 days' (13 days). A QR code and a banner for a travel planning app are visible on the right side of the page. The bottom of the page shows a Windows taskbar with various application icons.



**FORWARD**

# APPENDIX NEW PRODUCT CONCEPTS



# Whangarei: Gateway to New Zealand's Far North

A mix of culture and art  
World renowned art centre in the Far North



# Whangarei: Gateway to New Zealand's Far North

A mix of culture and art  
**World renowned art centre in the Far North**

## The New Zealand road trip stop

**Currently** – It is met with a flat response. There is no call to action. It lacks relevance to Chinese as there is no context. There is no immediate connection to the art. The artist is unknown. On its own, it is not a compelling experience for them.

### Future Direction and Opportunity

Drive relevance by making this a 'must do' typical New Zealand community roadie stop-over/break in the journey. This can be made more meaningful when the artwork is integrated into the experience of enjoying local New Zealand café food and/or a community playground in close proximity, where the family can play on the playground, enjoy photo opportunities with them feeding the ducks/swans etc.

This shifts it from a place of one isolated stop for random art, to a place for being, doing and learning – a far more immersive and memorable experience, targeted especially for families to break the journey north.



# ART IS A SUPPORT EXPERIENCE – NOT AN ITINERARY BUILDER

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- Art is met with a very flat response overall and is not an itinerary anchor point.
- It may, however be a support experience in a location and add richness to the visit to that region.

# Christchurch: Quake City

A unique, multi sensory experience, informing, engaging and educating visitors about the Canterbury earthquakes





# Christchurch: Quake City

A unique, multi sensory experience, informing, engaging and educating visitors about the Canterbury earthquakes

**Currently** – Little appeal for Chinese FIT.

Chinese do not like to be associated with any disaster and are very risk averse. China has many earthquake zones, and has experienced recent devastating earthquakes with tragic outcomes. They do not want reminders of this.

Generally this has little or no appeal as part of a holiday experience.

## Future Direction and Opportunity

It might be more of a rainy day activity for Chinese FIT.



# New Plymouth: Doorway to the Taranaki

Iconic mountain, black sand beaches, surfing and...

Len Lye Arts Centre – first museum in New Zealand devoted to a single artist



# New Plymouth: Doorway to the Taranaki

## Iconic mountain, black sand beaches, surfing and...

Len Lye Arts Centre – first museum in New Zealand devoted to a single artist

**Currently** – The Len Lye Arts Centre is not a destination or drawcard for Chinese itineraries into the region.

Chinese have little understanding of kinetic sculpture, nor of Len Lye's reputation. They see this as a passive experience.

### **Future Direction and Opportunity**

Drive relevance by making more of the arts culture of New Zealand. It will have most appeal to those Chinese with a 'bourgeoisie appreciation' of knowledge and education.

Highlighting the visual interest and intrigue of the kinetic sculptures together with the photo opportunities for interesting photos they can share will be important to get this incorporated into FIT itineraries.

Use of QR codes to enable Mandarin description of key sculptures will bring greater understanding and appreciation and will then also encourage more sharing.

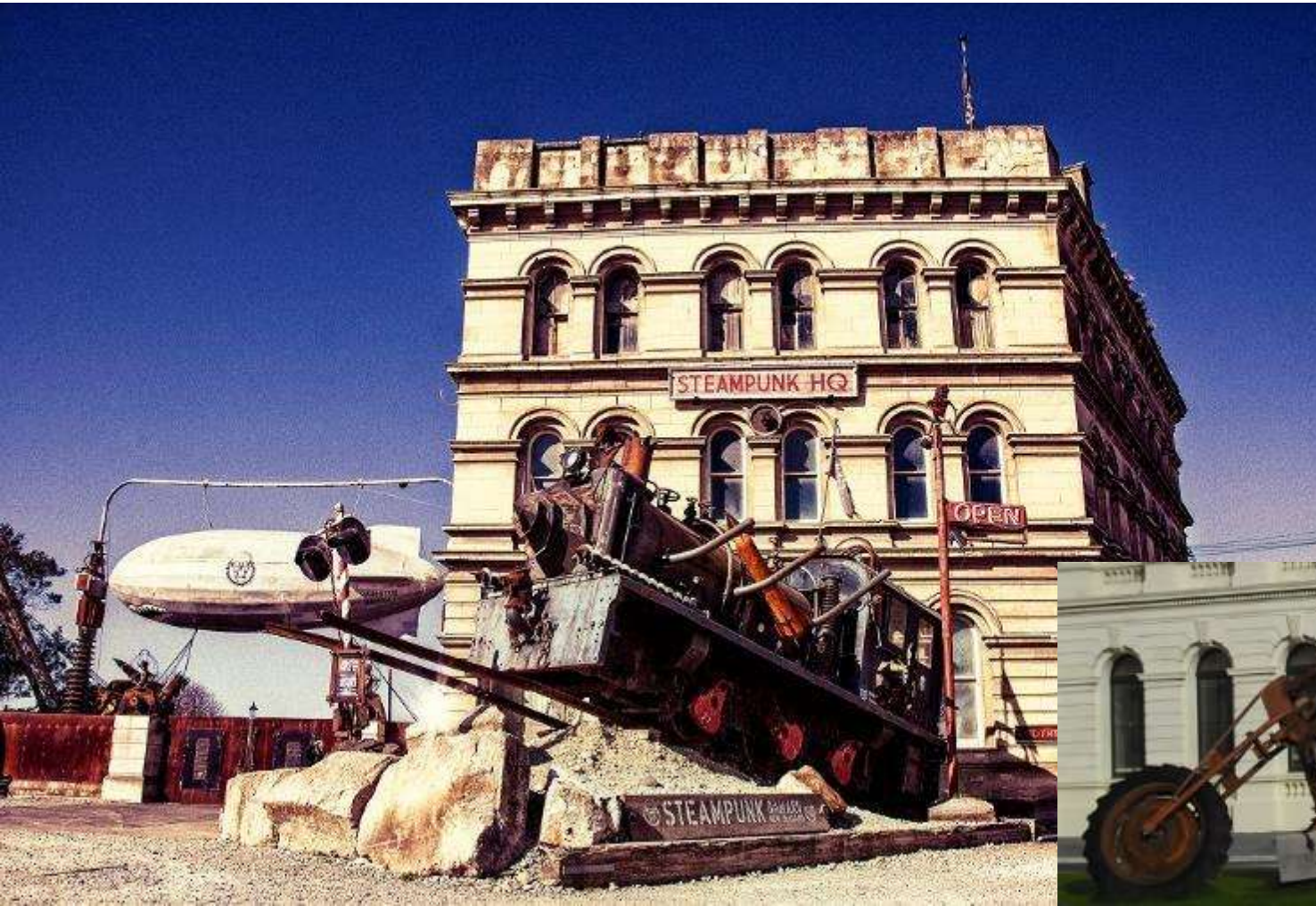
Having other Chinese rate and review the attraction will also help with building awareness for the centre.



# Oamaru: South Island's Victorian Precinct and Steampunk capital

Celebrating a mix of old and new

Fusing the usability of modern technology with the design aesthetic and philosophy of the Victorian age



# Oamaru: South Island's Victorian Precinct and Steampunk capital

Celebrating a mix of old and new

Fusing the usability of modern technology with the design aesthetic and philosophy of the Victorian age

**Currently** – This attraction is not a destination draw card for Chinese FIT.

They consider this attraction as static, not experiential at all. It does not meet their expectation and reputation for experiencing New Zealand history or art culture. For them, it is difficult to grasp the concept behind it. It has no challenge or promise of an enjoyable experience. For some, it's old machinery, showing nothing about progress and prosperity. Rather, it's more akin to their proletariat days when they were closed to the world and everything was broken down.

## **Future Direction and Opportunity**

Chinese FIT like to have experiences.

To visually capture and dial up the quirkiness can increase appeal to the attraction when they are in town.

Ideally, being able to imagine themselves caught up in the drama and getting their photo of the experience will increase appeal. E.g. have a quirky shot of the steam shooting out, real intriguing angles of the technology and lighting all together in one photo.



# Taranaki: Home to the Republic of Whangamomona

Travel the Forgotten World Highway and visit the quirky republic of Whangamomona

“Running of the Sheep”

Pop up shop Kiwi style



# Taranaki: Home to the Republic of Whangamomona

Travel the Forgotten World Highway and visit the quirky republic of Whangamomona

**Currently** – Any inference of poverty or potential for civil unrest is totally off limits and will not be included on any FIT itinerary.

Images of buildings that are derelict or lack maintenance signal a lack of progress and prosperity and give no sense of safety nor holiday fun.

## Future Direction and Opportunity

In regional areas, Chinese FIT look for symbols of lifestyles where there is a rich community involvement and togetherness, for example as could be experienced during a festival .

While a festival may not be the draw card to visiting an area, it can mean they will organise to be in the vicinity for the festival if the reputation of the festival is known and strongly perceived as of interest to them.



Rural Heartland New Zealand. This imagery has low appeal to China FIT.



An image of a fun community held-festival like “Running of the Sheep” has more appeal.

# FESTIVALS



Chinese FIT do not come to New Zealand specifically to attend festivals. However, festivals are (like farmers' markets) an added bonus to the experience of New Zealand.

Festivals are not draw cards to regions. However, they do add another dimension to the holiday experience and, if known about ahead of time, Chinese FIT may be willing to incorporate them into their itineraries.

## **Opportunity – Calendar of Festivals – by time of year and season**

There is an opportunity to have a calendar of festivals clearly listed on the NewZealand.com site. as well as on RTO websites.

This needs to have:

- Festival – a descriptor and image showing type and audience (general family or adult)
- Time of Year – Date(s) of festival – duration/timing
- Region
- Town/Place of festival
- Link to the website promoting the festival.

## **Festivals of interest to FIT Chinese**

- Seasonal festivals – Garden and flower festivals – e.g. Manawatu/Wanganui Rhododendron festivals
- Unique food festivals – e.g. seafood, salmon, Bluff oysters, scallops, whitebait
- Chinese Festivals – e.g. Lantern Festival in Auckland
- Agricultural farm festivals – e.g. Running of the Sheep, Agricultural Farm Days
- Snow Festivals – e.g. Queenstown, Ruapehu.



# OYSTER WORLD

## NEW ZEALAND'S PREMIER SEAFOOD EXPERIENCE

Our world is your oyster

### WHAT

- From Seabed to Plate the story of iconic New Zealand seafood including Bluff Oysters,
- Oyster Bar, Heritage Centre, Wharf and Fishing Boat
- Self-guided tour \$20 one hour
- Full Shuck tour (includes a oyster dredge and Oyster Shucking)\$65 two hours

Bluff 2.5 hours from  
Greenstown

### WHY

- Home of the world famous Bluff Oysters plus Abalone, Salmon, Crayfish and Blue Cod
- From the Great Southern Ocean from the bottom of the world



# OYSTER WORLD

## NEW ZEALAND'S PREMIER SEAFOOD EXPERIENCE

Our world is your oyster

**Currently** - To experience oysters is part of a satisfying New Zealand seafood experience. This concept is an attraction for seafood enthusiasts.

To build reputation, the proposition must be clearly stated to highlight the uniqueness and specialness of the attraction. The headline needs to be more evocative to get them to drive to this region of New Zealand. Two and a half hours south of Queenstown means it needs to become a "Must Do" attraction for Chinese FIT.

### Future Direction and Opportunity

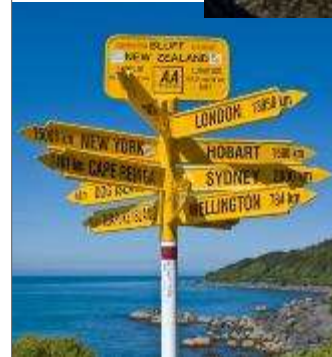
The key hook is to experience the renowned and world famous Bluff oysters from the Great Southern Ocean of New Zealand in the unique location where they originate.

Secondary to this is the opportunity to taste and learn about other New Zealand seafood.

The focus needs to be on the food experience and not just educational learning experiences. The expectation is to taste different varieties of oysters prepared in different styles, not just Bluff oysters, and to create a total culinary experience where this can be accompanied with a glass of champagne or wine.

It also must have an opportunity for extended experiences to appeal to different group needs – like the oyster dredge and opportunity to learn how to shuck oysters.

Getting KOL early on will assist with building visitation.



# REAL KIWI WILD

## @ home with New Zealand's icon

### WHAT

- Kiwi spotting in their wild natural environment
- Intimate and informative tours
- An evening twilight cruise, short guided walk and kiwi spotting tour \$150 three hours
- Stewart Island four hours from Queenstown (overnight stay required)



### WHY

- The remote and pristine Stewart Island where the sunsets create a glowing sky
- The kiwi, the New Zealand icon endangered on the mainland, flourishing in its natural habitat

# REAL KIWI WILD HEADLINE MUST GRAB THE ATTENTION

**Currently** – Chinese want real immersion in uniquely New Zealand experiences. To experience the rare endangered kiwi (bird) in its 'semi wild and natural habitat' is appealing to the more adventurous Chinese FIT.

Many however do not understand much about the kiwi. For Chinese a kiwi is a kiwifruit. Its connection to a 'must do' New Zealand experience must be visually linked to the kiwi bird.

## **Future Direction and Opportunity**

Highlight the uniqueness of this adventure.

The proposition must be clear – prime viewing of kiwis in their natural habitat on Stewart Island. This three hour experience would include an early evening sunset coastal boat cruise, a guided easy trek through the semi wild native forest to an exclusive beach where kiwi spotting and observing the special kiwi personalities in the wild, can be experienced.

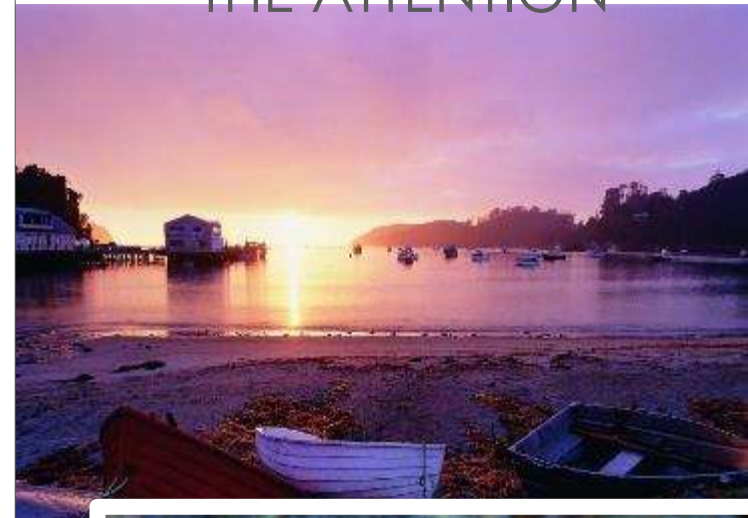
Brochures and information would need to be in Mandarin.

They want to know:

- why a kiwi is worth seeing – what can they expect, the way they feed, their idiosyncrasies, their birdsong.
- what they need to bring, or if equipment is provided.
- how long the walk is for and a track descriptor (preferably easy grade).
- are there free transfers from the accommodation? At night looking for transport is not considered safe.

It should be a small exclusive group excursion with options for southern regional New Zealand food experiences on board the boat, e.g. Southern Blue Cod buttie with aioli or chili sauce, Bluff oysters, paua and whitebait fritters with a hot drink.

Target the more adventurous and repeat FIT traveller wanting to see the unique and exciting part of Southern Hemisphere New Zealand. Dial up the Southern Lights to give a possibility of another draw card for venturing to Stewart Island. Preferably have links into getting there – fly or boat transportation



# INDULGENT LAKE SIDE WELLNESS AND SPA

## WHAT

- Unique geothermal mud treatments renowned for their healing and invigorating properties
- Private mud bath, Sulphur spa experiences
- One hour massage for two
- \$998 for two for two nights
- Bubbly on arrival and breakfast included
- Free Wi-Fi with high speed internet
- Free transfers



## WHY

- Relax your body and mind at Rotorua's exclusive luxury spa
- Unrivalled geothermal healing experience plus waterfront activities
- Pacific Rim infusion fine dining

# INDULGENT LAKE SIDE WELLNESS AND SPA

**Currently** – Spas are a panacea for relaxing bodies and alleviating travel stress. They are revered world-wide.

New Zealand currently does not have a reputation for luxury spas and spa treatments. Chinese FIT will need to understand what is uniquely New Zealand about this spa to put it on the 'must do' list.

## **Future Direction and Opportunity**

Great opportunity for Chinese FIT to slow down the momentum of the holiday and relax – a day without driving, or an end or beginning of the day's activity.

Clearly state the proposition – it must be a special New Zealand wellness experience. Our pristine natural geothermal waters are attractive, however how this is delivered is important for clarity. Is it a day spa vs. a resort with accommodation. Family or adults only? Open air and indoor? One pool or many? Entry for an hour or all day?

What is unique about this spa compared to others – direct geothermal mineral waters from volcanic aquifers? Mineral content? Volcanic mud treatments? Best scenic views across volcanic landscapes? What style of food offer is available?

There needs to be an outlook suited to a best photo opportunity with company branding for WeChat sharing and Weibo microblogs.

Mandarin translation and dramatic outdoor photos with steam and unique New Zealand landscapes are invaluable.



Spas are very accessible in Japan and a unique proposition relative to this is important



## OPOTUNITY

- Holistic wine, tasting, leaning, scenic, experience
- Taking time to enjoy the environment
- Potential to come in the early evening for sunset, food and wine – they like to eat early
- Tasting to purchase – some high end will purchase the very best in volume to be sent home. They would not generally ask to try if they were not seriously considering to buy – or they would lose face
- For higher involved and a more formal tasting experience, a certificate to show wine knowledge

## Response

- Wine is primarily associated with Europe – and this is where the best wine in the world is (from reputation). The New Zealand reputation is growing among the wealthier and more sophisticated.
- Wine is a nice incidental in New Zealand – linked with the bourgeois culture and food – it is not an end in itself.
- There is an interest in learning more about wine and experiencing New Zealand wine of note.
- They are relatively unsophisticated and in many instances don't want to drink.
- They are concerned about their face turning red and about drinking and driving – which means the driver will miss out.

# CYCLING: WINE EXPERIENCE



## Opportunity

- A short 3 kilometres flat bike ride, lunch and tasting
- Off road, scenic, rural
- Map and icon signage with times and distance, geolocation co-ordinates

## Response

- Limited appeal
- It seems too difficult, the distances too long for a pleasure bike ride and they are not interested in visiting a number of different vineyards
- Concern about drinking and cycling



# EXCLUSIVE WINE EXPERIENCE

## WHAT

- A niche targeted opportunity
- This experience risks being too controlled and rarified for the Chinese
- A friendship food and wine experience would be appealing
- If it is this premium, there would need to be crayfish



## Concept

- Exclusive very limited premium experience
- Immerse yourself, see, taste, learn, do, stay
- Learn – and be recognised
- Romantic, luxurious
- Private and personalised
- With your friends



**FORWARD**

# **APPENDIX: TOURISM NEW ZEALAND TOP IMAGES REVIEW**





# IMAGE DIRECTION FOR TOURISM IMAGERY

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- Images that show New Zealand as spectacular and with dramatic intensity, in a vein that they expect New Zealand to be, are often the most popular with Chinese FIT. They look for iconic New Zealand images with mountains, snow capped peaks, blue sky and contrasting foreground colours. They have most likely already seen many of this type of landscape in their friends' photo images.
- Images will be glossed over if the message cannot be understood i.e. what you will experience, or that it is uniquely New Zealand or special), or if it gives an impression of untidiness or disrepair.
- Images that are bright, clear, and have height and depth to them are very appealing.
- Colours they expect are lots of blues, white from mountains and colorful skies. They are less taken by images of inward focused greenery and forest, without any accompanying cleanliness of water or perspective of height of mountains.
- They don't like to be too isolated, so images that incorporate nature from a vantage point of where other people/buildings are is reassuring for them. They like seeing images with horizons.



# IMAGE DIRECTION

---

For a balance of images that engage:

## **Keep it fresh**

Chinese visitors are taking some great, arty, impactful images and posting these online. To draw in viewers, images need to have a “point of view” feel and tell a story/experience.

## **Avoid too empty images**

It is important to include a sense of intensity, action or people in or just outside the image to minimise the sense of loneliness or boredom:

- *“I don’t want to be alone – Its like I am a ghost”*
- *“It is so sad if everything shuts down at 6 o’clock”.*

## **Engage the viewer with the image – with people or activity**

The selfie style photo has people in the image interacting with the camera and viewer of the photo. This draws in the viewer and makes it more real.

## **Avoid staged promo style**

An image that seems staged for promotion is much less engaging than an image that seems spontaneous and real.

**APPEAL OF THE NEW ZEALAND IMAGES – TOP TNZ IMAGES FROM CHINESE FITS**



While pure and clean, this image is considered less iconic New Zealand.



Wide expansive New Zealand,  
Blue and white= pure +  
untouched mountains.

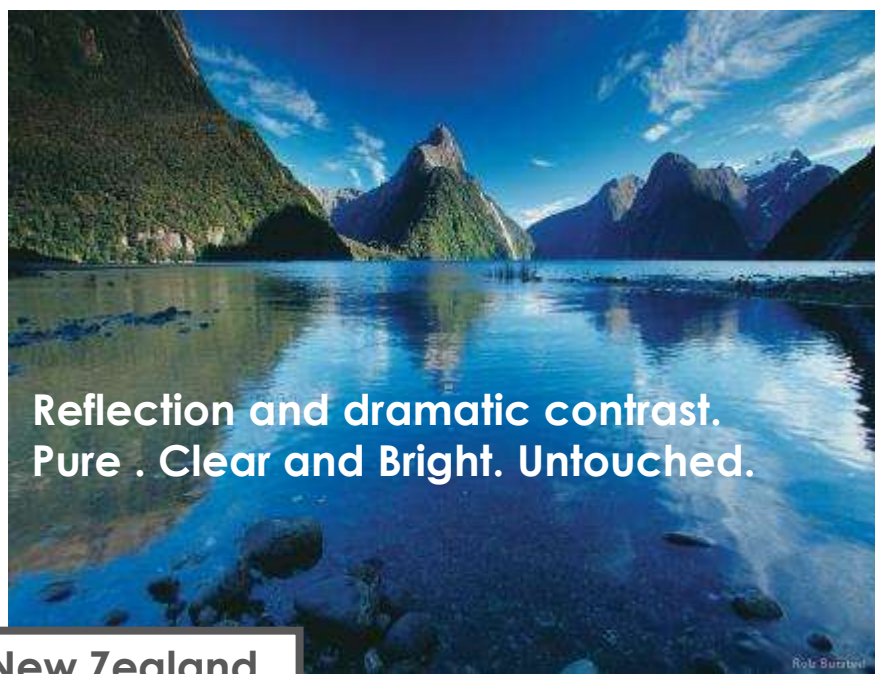


Culture in nature,  
Dramatic  
Compared to self,  
Blue clear and  
unpolluted skies.

Unfamiliar photo and not considered an iconic New Zealand photo.

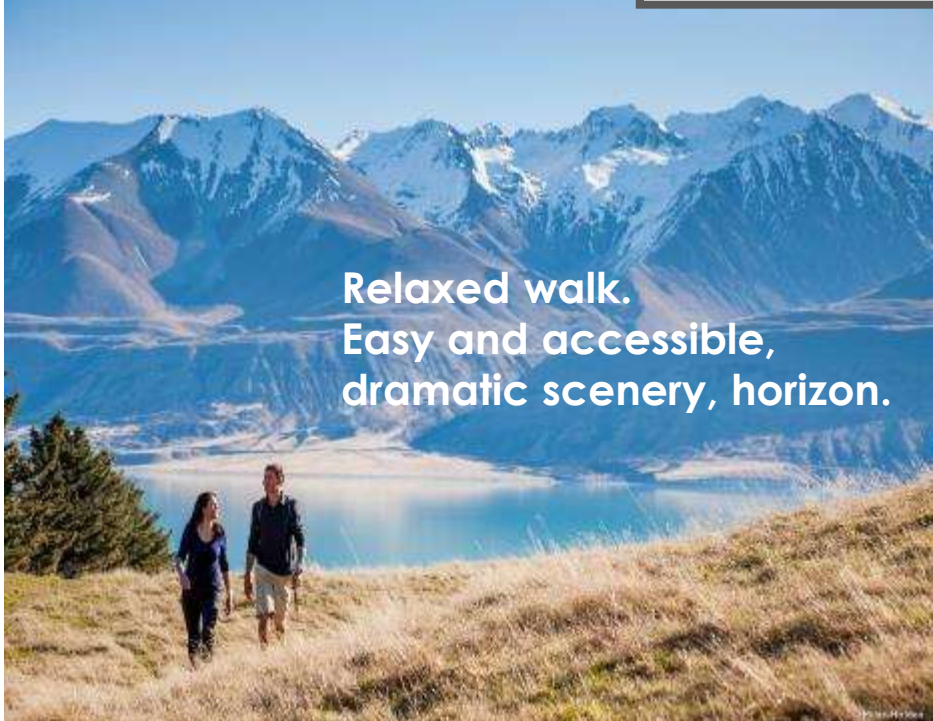


Clarity, clean air and pristine reflective water. Nature is protected in New Zealand.

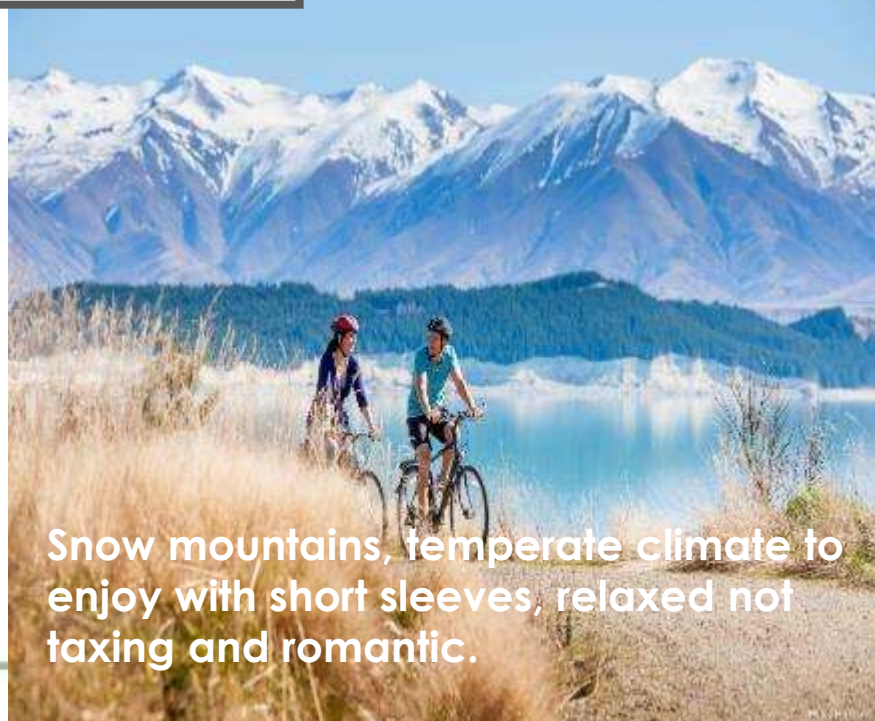


Reflection and dramatic contrast. Pure . Clear and Bright. Untouched.

**VERY ICONIC New Zealand**



Relaxed walk. Easy and accessible, dramatic scenery, horizon.



Snow mountains, temperate climate to enjoy with short sleeves, relaxed not taxing and romantic.



**Uniqueness and significance of glacier compared to size of people.**



**Awe - Dramatic mountain scenery dwarfs large tourist boat.**

**DRAMATIC AND EXPANSIVE**



**Pure relaxation, sunset in the expanse of nature, endless horizon.**



Lifestyle looking out at nature. Warm bright clear colours of the sunset = New Zealand as being pure, clean and no pollution, endless horizons.



Venture Southland



FORWARD



Unique Southern lights, urban view out across nature.

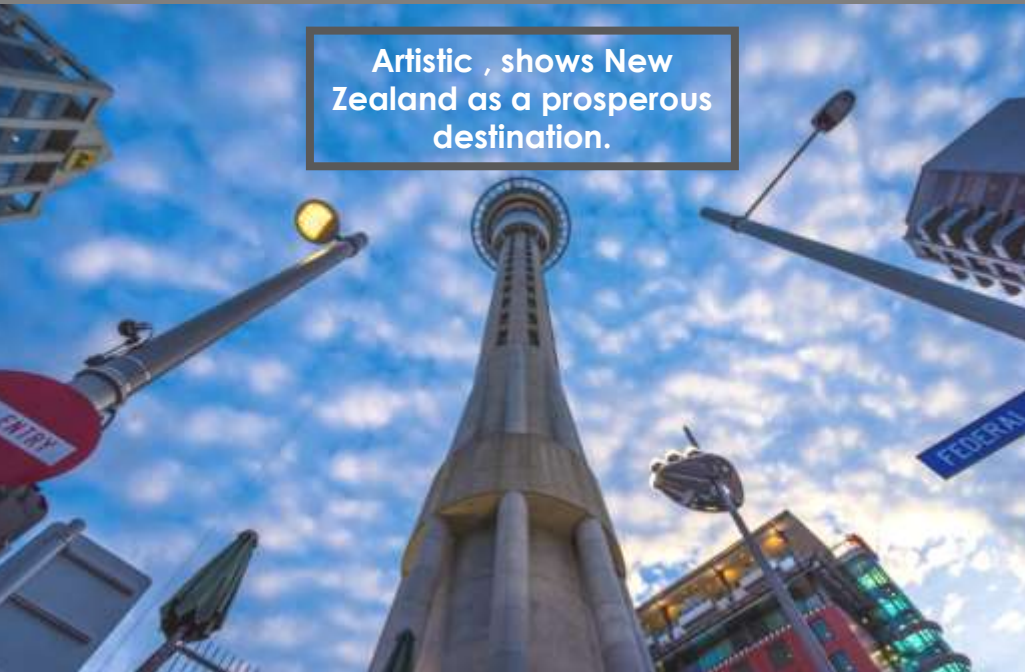


Free fall 200 km/h

# Traveller Generated Content FROM SOCIAL MEDIA POSTS



Photographing natural beauty.



Artistic , shows New Zealand as a prosperous destination.



Expansive, clear, rich colours, pure.



**Traveller generated posts on social media**  
 They show a level of intensity and involvement, movement. There is often a relationship with the viewer – looking at or aware of the viewer.  
 Many Chinese FIT visitors have very good photography skills and the images are often arty or have an interesting perspective.





# IMAGES WITH LESS APPEAL



**Too ordinary** *"We have bridges like that in China".*



**Not perceived as uniquely New Zealand.**  
*"Too green", inward, no horizon to look out to. Image needs to have open sky, or blue running water.*



**Not uniquely New Zealand** – *doesn't tell a story about the location.*



**FORWARD**

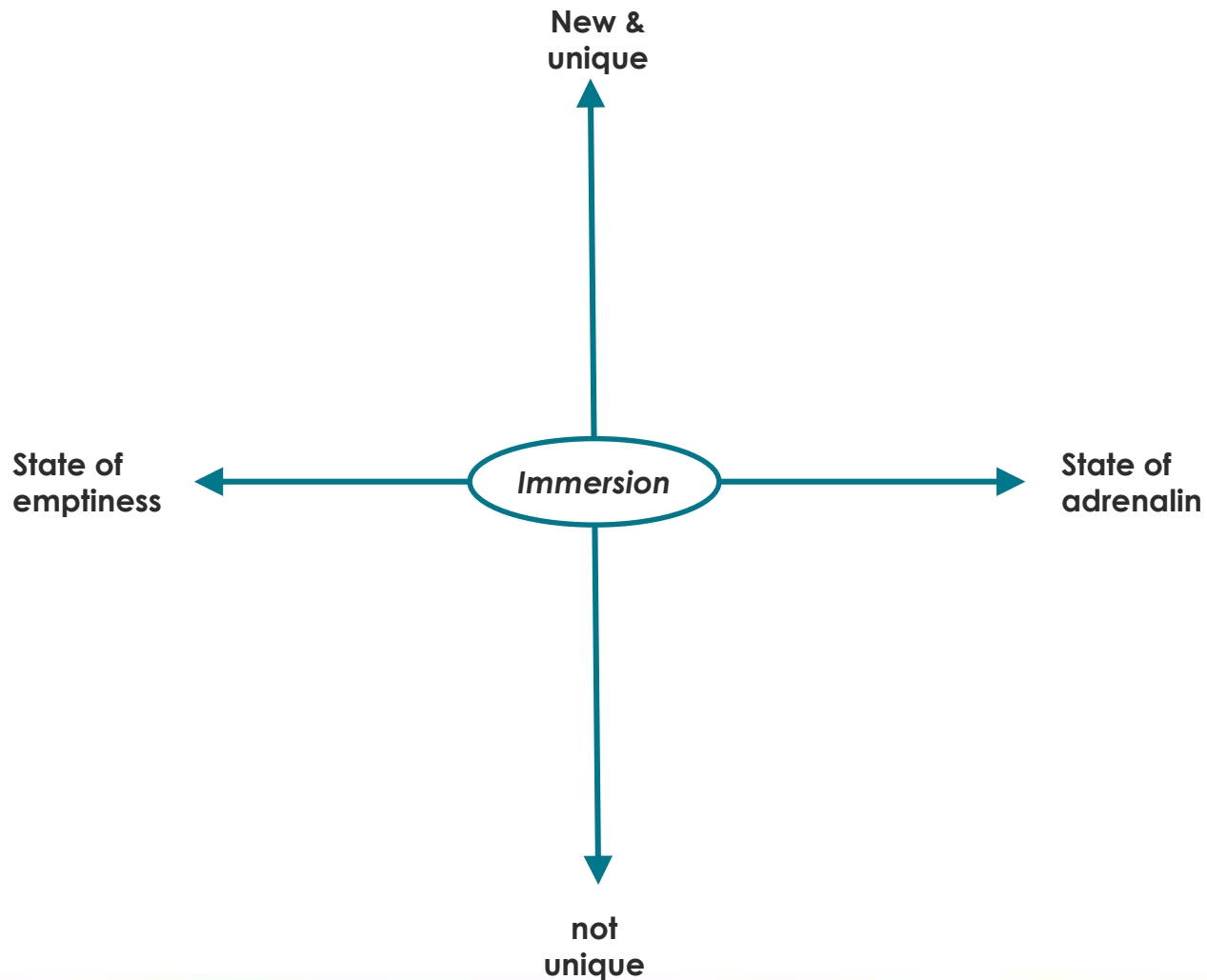
# IMAGE DIRECTION FOR BUILDING RELEVANT IMAGERY FOR THE SECTOR



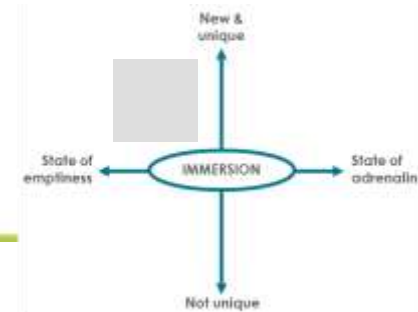


# DIFFERENT EXPERIENCES WITHIN A TRIP

Travellers look for a range of experiences to include and plan their itinerary around



# IMMERSION EXPERIENCES



An archetypal, unique and intriguing image, it works because of the two images: mountains, green grass, sheep up close (immersion) and a New Zealand family. It is possible to imagine being here in this unique shot.

Hobbiton and the Lord of the Rings experiences are unique, different and intriguing for many people. These movies sparked awareness of and interest in experiencing New Zealand nature. Building on this is a substantial opportunity. It is nowhere else, and is unique.

The petite bourgeoisie lifestyle and experiencing things European and British is very attractive. High tea is currently on trend. Taking time to have a different and refined experience.

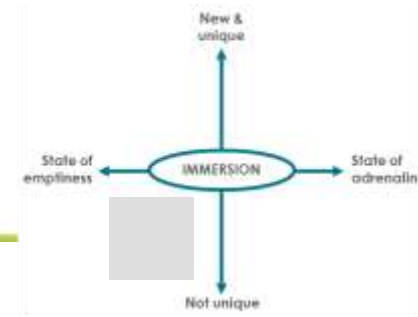
A stand out, unique and almost unbelievable experience to dig your own hot pool, by the beach and sit in it in a pristine environment with friends.

The unique New Zealand culture and thermal area is different and interesting. A new experience. Few thermal images were chosen – not because the experience is not desirable and special, but because none of the images we had captured the unique outdoor thermal experience absolutely up close – involving.

A scenic beach shot – looks an idyllic experience, right in nature. You can imagine walking on the beach because the boat is close to the beach.



# IMMERSION EXPERIENCES



This is an attractive, beautiful beach scene that looks unique – ideally it would have some people/café in the shot to deliver a sense that you would want to stay longer than half an hour.



Beautiful serene environments with few people are attractive to connect with nature, feel relaxed and refreshed.



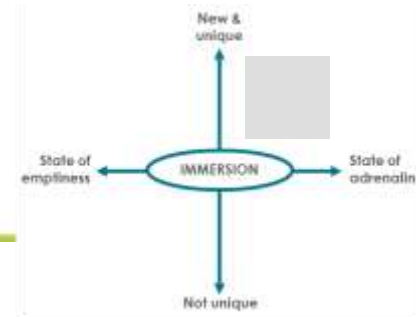
Wine and vineyard experiences where you can try, learn and experience, have tasting platters to share and understand more about wine and the special, unique nature of the wine.



Cycling (relatively easy cycle trails and cycle ways) is very attractive – and again allows people to experience nature and local communities and places.



# IMMERSION EXPERIENCES



This image appeals because it is immersion zero distance: “catching” crayfish (touching, holding the source) and crayfish (southern rock lobster) is very desirable and aspirational.



This idea of being able to “pluck” abalone or shell fish from a rock, step out of the water (which is clean and fresh) and potentially eat it on the beach is very attractive and engaging. This is a huge contrast from China.

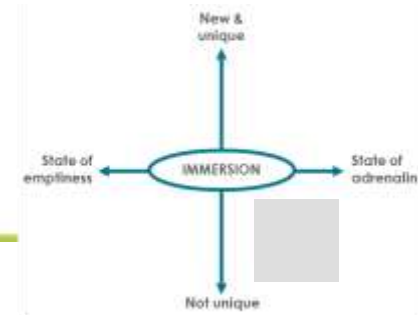


The concept of flying in a small plane, sitting next to the pilot, and even having a chance to fly the plane (hold the joy stick/flight yoke or have a lesson) is extremely attractive. This experience is not possible in China and is very aspirational and exciting.



Seeing and standing on a glacier.

# IMMERSION EXPERIENCES



- While they are familiar with these activities, and you can do them in other places, they will also be special in New Zealand. They may not be the anchor reason to come, but will be a strong part of the attraction
- There is a sense that more extreme adventure activities would be safe in New Zealand. They trust the operators and New Zealand organisations *“They will have the regulations and follow them, it would be much safer to do these things in New Zealand”*



*“I want to go up in a plane and be pushed out with the instructor”*



The spectacular scenery, and contrasting, vibrant clear blue sky, white clouds, and green paddocks is attractive



Helicopter trips to see glaciers and snow are easy, but also exciting and challenging



Whales and dolphins are interesting, but not unique

# Older travellers (under 55) Stimulation with relative ease



New & unique



State of emptiness



Older travellers still want excitement but the balance is more passive



State of adrenalin



not unique



# NEW AND DIFFERENT EXPERIENCES

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Tree house accommodation – with the mountains in the background is highly novel and appealing.

# FAMOUS AND SPECIAL



- Famous is good – e.g. the steepest street in the world, a place relevant to a famous person or a renowned mirror lake. Visitors will include these in their itineraries. They have stories to tell.
- It is extremely important to develop stories and develop the reputation of different places and experiences throughout New Zealand. Regionally having strong development of icons and unique experiences is important.
- These icon experiences or places can be quite quirky, intriguing and are not necessarily significant:
  - oldest
  - highest
  - only
  - unique.....





# IMAGE DIRECTION



Biking Cochrane Falls



Crab Cookout (best of Thomas2)



Driving Cochrane Valley



Photographing Cochrane Coast



Timepiece Cochrane Image 1 (file:000167)



While ok these images are overall lacking a sense of immersion zero distance participation.

**The images seem a little staged:**

- in contrast to images where participants are interacting with the camera – are speaking and inviting the viewer into the shot – as is more the case with a selfie.
- are reflecting the experience and the feeling that goes with it with their posture or pose.

## Asian v non Asian in images

- Having Asian people in images creates a greater sense of seamless immediacy and a sense of “I could be there” – there is more of an immediate recognition and the viewer is more easily able to emotionally transpose themselves into the image.
- It is not necessary to have Asian people in all images – especially lifestyle scenes. Visitors do want to watch and passively observe and experience the lifestyle of others and have opportunities to meet the locals and live like the locals and interact with local people.

## Real images – bringing the scene to life

- The images above are overall somewhat brochure-like.
- The sense of real action, enjoyment, challenging yourself is not there - they are not participative enough (in terms of more people in the bike shot, holding the crayfish in the bbq shot, digging and sitting with friends in the beach shot, interacting with the camera in the train shot).
- Interaction with the camera – which is often the style of ‘selfie’ images takes the participant more fully out of the scene and allows interaction with the viewer – the viewer is more able to respond to this.



# IMAGE DIRECTION



Biking Owharoa Falls

*This image was chosen a couple of times because it showed cycling.*

**Overall impression not optimal:**

- Looks staged and not real life - fake cheap painting look. It could be doctored.
- Too static – 'needs a bunch of people' – ideally Asians interacting together and interacting with the camera.

**Development:**

- A group riding together (4 - 6).
- Show where the rider has come from and is going to on the track.
- Include the vibrant colours and blue sky of a summer day.



Driving Creek Railway

*This image is interesting and attractive as an experience.*

It would benefit from a story – unique, best, special because...

The image as it is - is not unique – similar experiences in Australia and South Africa. Interactive participation with the camera would make the shot more real.

**Development:**

- Some Asian visitors on the train.
- Interacting with the camera.
- Show the drop .



*This activity was chosen because it is a unique experience (good story), zero distance immersion in nature, can be done with friends/others.*

**Image not optimal:**

- Not a crowded scene – togetherness, not crowd. There are too many people here.
- The focus needs to be on digging yourself and then sitting with friends together in a pool – not a crowd .
- A crowd is what people are wanting to get away from.

**Development**

- A group of close friends – one digging and the rest sitting in a pool by the beach.
- A group with others near possibly - but not a crowd.
- Make sure that the pool is the focus and it is obvious that this is a self-made hot pool.



# IMAGE DIRECTION



*The concept of catching and cooking on the beach has appeal*

- Catching (the style of shot we had) is more compelling than eating – more immersion.
- A Chinese person more powerful, immediate and engaging than European New Zealanders.
- Own user experience is less staged.

**Development:**

- One person holding a crayfish (I caught/touched it image).
- Cooking on the beach.
- Asian friends – or Asian and European group.



*This shot is ok but not optimal.*

The image does not optimise the feeling of the pristine beach and cove.  
The image looks like potentially other destinations - Phuket and Vietnam.  
The women in the shot seem a bit static – a picture of – not in a picture.

**Development:**

- Selfie – friends having fun – doing something – movement.
- More of sea and sky – less cave.

Example - Watching the Milky Way – sense of awesomeness, experiential.

- Romantic – watching, sharing with wine.
- Group of friends – experiencing together - celebrating friendship.
- Technical immediacy – taking a selfie – being in the moment in the image.
- Whole family – enjoying an experience together.







**FORWARD**

# THE UNIQUE AND COMPELLING NEW ZEALAND PROPOSITION





# ZERO DISTANCE IMMERSION: **DIVERSITY**

**INSIGHT** Diversity of different experiences delivers a great travel experience and also gives lots of distinct, memorable and shareable stories

New Zealand is recognised and is appealing because of the many **very different landscapes, environments and experiences to be had relatively easily**. It is intensity packed in.

Those that have been to Australia recognise that there can be long distances to travel between places and that it can be relatively difficult to find places to camp. New Zealand delivers much better on this.

## **IMPLICATION**

It is important that this is not described in terms of mountains to sea in one day or do xxx all in one day. This seems too rushed, hard and pressured and is not at all appealing. So many options, lots to choose from, rich experiences... 'top 10 Highlights' or 'must do' are much more appealing

# ZERO DISTANCE IMMERSION: INTENSITY



**INSIGHT** At the source, up close involved: *Feel it, see it, touch it, do it, taste it, share it*

## **Real immersion gives a sense of intensity to the experience**

- Feeling fully involved, having time to 'be' – feel it, see it, touch it, do it, taste it, share it.

## **Intensity is being in the moment**, experiencing something yourself

- Feeling the pleasure, excitement, intrigue or awe of the moment.

## **Intensity is a multi layered experience**

- Understanding the story - why is this special, doing it, challenging yourself to step out of the comfort zone and take a challenge, try something new, do it with others, experiencing or watching. There can be as much pleasure for some in watching others and taking the photo as doing.

## **Small experiences can also have a sense of intensity**

- Listening to the birds in the morning, looking at the night sky, seeing a dramatic waterfall from a boat, watching the sun rise or set, seeing the clean air, blue sky and white clouds.

## **IMPLICATION**

In imagery, a sense of intensity is gained by being able to imagine yourself in the image, participating and having the experience. Close ups of people, people looking at the camera and having fun with the shot not just posing, adds to this sense of immediacy (selfie style).



# ZERO DISTANCE IMMERSION: **EASE**

**INSIGHT** Being able to have zero distance immersion experience easily is very desirable

**It must be simple, easy – with no stress or hard work.** The Chinese visitor does not want there to be anything too challenging to have the experience.

*“I want to sit in the boat and look up at the spectacular mountains – I do not want to climb up the mountain – it is too hard”*

In many instances they would like to be a part of the experience but not necessarily do it all. E.g. watch the crayfish/fish being caught, touch it, get a photo – but not do the hard work.

**Simple involvement activities** like churning ice cream, choosing the flavour, using special milk - can be very attractive.

**Serendipity – stumbling across unexpected delights**, discovering and experiencing things you hadn't expected is very important to the Chinese traveller. They will purposefully not plan everything to allow this to happen. The surprise of a great unexpected experience adds to the whole trip.

**To allow discovery with ease.** There is a need to communicate so they are aware of what is available (views, activities, accommodation, events, experiences), signposts and posters, have rest stops to enjoy the view, have an app with up to date highlights, events, interesting facts and information, with location and cost details.

## **IMPLICATION**

Taking people to the experience is highly attractive – bus, train, helicopter, van, boat, buggy – and they will pay.

# THE UNIQUE AND COMPELLING NEW ZEALAND PROPOSITION



Everything close in 100 % Pure New Zealand's dramatic and untouched natural environments is strongly attractive. "Our ordinary is their extraordinary".

- The expectation of experiences is central to deciding to actually come to New Zealand.
- We must make the personalised experience as tangible as possible in everything we do:
  - Imagery/photos
  - Stories
  - Explanations
  - Videos
  - Mandarin language
  - GPS
  - Infographics maps/symbols
  - Personalised reviews and testimonials
  - Ratings.
- Storytelling, evoking a unique and engaging experience, is central to:
  - Gaining attention
  - Building engagement
  - Having people participate
  - Establishing reputation
  - Enhancing, delivering, and extracting value.
- We must evolve and develop our story telling beyond simple descriptions to include convey unique experiences. Differentiated stories will help build and extend must do experiences, activities, regions, and overall value.