

Understanding Domestic perceptions of the West Coast

A debrief created for Development West Coast by One Picture

What was our objective & approach?

Our key objective from this project:

To adopt a consumer centric approach for surfacing key economic opportunities for the West Coast by:

1. Understanding the travel mindsets, needs and behaviours of the domestic audience to optimise opportunities for the West Coast
2. Understanding the 'hooks' that can motivate New Zealanders to consider the West Coast

How did we go about it?



1. Workshop session

Discussing and exchanging ideas with key Development West Coast stakeholders on what we already know, and what we want to know



2. 12 In-depth interviews

Speaking with individuals for an hour to understand their process and motivations when it comes to a domestic holiday



3. Two Co-design focus groups

Speaking with groups of 8 consumers for two hours in AKL and CHC to take early concepts in and craft them together



4. Nationwide feedback

We surveyed 1,142 people in our One Picture Neighbourhood who answered 7 questions about the West Coast. Note: Not a representative sample

UNDERSTANDING THE CURRENT DOMESTIC TRAVELER



How were consumers talking about their domestic trips?



That each trip they take is surprisingly good

That most had already taken a trip somewhere and it had reminded them of the special things we have in our own backyard

That a New Zealand trip is feeling less like a compromise the more we explore

Getting a taste of New Zealand is leaving us wanting more and thinking of where we can go next



That everyone's done Queenstown

First on the list for many; experiencing Queenstown without international tourists and less hustle & bustle

But now they'd been, they're starting to look further afield for what else is out there

Getting off the beaten track and trying to find a spot that no one knows about



That they're considering longer trips

Annual leave wasn't in short supply, and in some cases, they were being forced to take holidays

And many thinking about what an extended trip could look like and where they could go

There are few 'embedded' road trips in the NZ collective mindset, there is an opportunity here!

SO: No one has yet felt they've seen everything NZ has to offer, and their 'NZ Bucket List' is growing

We heard that these travellers are seeking the same things, only now domestically...

- Right now, we are loving our country more than ever. We are discovering places we wouldn't normally find or visit, and we have a new appreciation for how quiet it is without international visitors
- We believe that now is the best time for seeing NZ. We are choosing to prioritise what we haven't done in a long time or what we had kept putting off
- And we are wanting to support NZ more than we ever have before. A patriotic duty when it comes to exploring our backyards and spending our money to support our tourism sector



“I would normally book a holiday overseas or to Australia, however because of COVID I’ve started thinking about the places I have not been to before in New Zealand.”

SO: There is a story to tell about the West Coast that is considered a true off the beaten track Kiwi holiday

But that a REAL holiday was hard to achieve in New Zealand

What made up a 'real' holiday in the mind of these travelers?



That I'm willing to take the time for

Part of the dream is about a holiday for an extended time... which hasn't featured much in their experience of NZ so far

That limiting themselves to long weekends has meant that a weeklong holiday hasn't yet crossed their mind



That I feel like I'm experiencing something truly different to my everyday

That a holiday is about escaping and feeling transported physically and mentally from their routine

That they assume they've already seen New Zealand if they've gone to Queenstown, so there isn't much more else left to see



That feels remarkable

That they arrive home with a story to tell and pictures to share

That this is harder and harder to find in our conventional hot spots, even the most stunning Queenstown vistas are becoming the norm

SO: If there is anywhere in the country where New Zealanders (especially Aucklanders) can have a REAL holiday it's on the West Coast... we have the ability to message authentically around all three of these

**WHAT DID WE HEAR ABOUT THE
DOMINANT NARRATIVES OF THE
WEST COAST?**

When we asked consumers what the 'West Coast' had going for it, it always started with our physical assets

Rugged coasts

Rugged and wild was one of the most reoccurring themes when consumers thought about the West Coast. A place that had been moulded by the (sometimes) extreme conditions

Lush greens

That everywhere you look, it's more green than any other region. Whether this be lush farmland or deep bush

Untouched vistas

A sense that it is how it's always been. That there is no other place where you can see as much of 'old New Zealand' ... before people and development.

Q1. What comes to mind when you think about the West Coast of the South Island

Untamed, unspoiled, green, alive. Its a place to escape to, get away from the rigmarole of city life and reconnect with the land.

Wet, exotic flora and fauna, untouched, beautiful scenery, great native forests and bird life and awesome beaches

Beautiful landscapes. Snow. Coastal scenery. Maybe Milford Sound in not sure. The big mountains

SO: We're synonymous with being one of the most beautiful and natural regions of New Zealand

Which was quickly followed by our people and our history

Coasters are super friendly & helpful

Our people – Coasters, unprompted seen as a unique bunch who were friendly, open, and interesting. Different perspectives and a different way of life, but open to ‘outsiders’. Always happy to help, even if it’s a ride to Greymouth to catch the train home

Pioneer History

We are seen as being one of the few places that have maintained a sense of pioneer character, through the likes of Shantytown and Reefton. That our history of exploration and pioneering spirit was unique

Interesting coasters

But time and time again, what made us extra special was the interesting stories of the coast that start at the pub, and end up somewhere they’d never believe

Q1. What comes to mind when you think about the West Coast of the South Island

It’s very rugged with some beautiful scenery and an amazing history

The people of the area always have amazing stories to be told as many would never have left the area

A place I want to visit - Rugged historic full of history great food adventures and scenery

SO: Our people are a huge asset. While hard to message around, the ability to have true local experiences is what has drawn many we spoke to back to the region

And some of the negatives won't be a surprise to us

That it's hard to get to, from anywhere

Like Gisborne in the North Island, it seems like a hassle to get to from anywhere in the South. Being surrounded by such beautiful mountains means all routes in are a bit of a challenge, especially in winter

The rain

Recognised as one of the wetter regions in New Zealand that will likely be raining if you visit. But not necessarily as bad as the wind in Wellington, or being really cold like Invercargill

The pace

Considered to be a slower lifestyle that is relaxed and takes some time to adjust to, but also means that restaurants might close at 7 and finding shops open on a Sunday is rare

The sandflies

That our environment is the perfect place for sandflies, and that any traveller needs to be prepared with plenty of Deet

Q1. What comes to mind when you think about the West Coast of the South Island

Beauty! Rain! Hokitika. Blue rivers. Fox and Franz j glaciers, waterfalls. More rain lol

Too far away

Mountains, nature, deserted beaches, sandflies

SO: There weren't any surprises when it came to the negatives about the region. Interestingly, they were more considered 'part of the experience' than they were truly negative reasons not to visit us

**Interestingly, and unlike other destinations in NZ,
we were seen as a district, rather than a collection
of towns each promising something unique**

**We had few defining narratives around specific
towns... not even Hokitika was synonymous with
any one thing**

**Which means when Kiwis think about a trip to the
West Coast, it's hard to know where to start**

**Mining &
Settler towns**

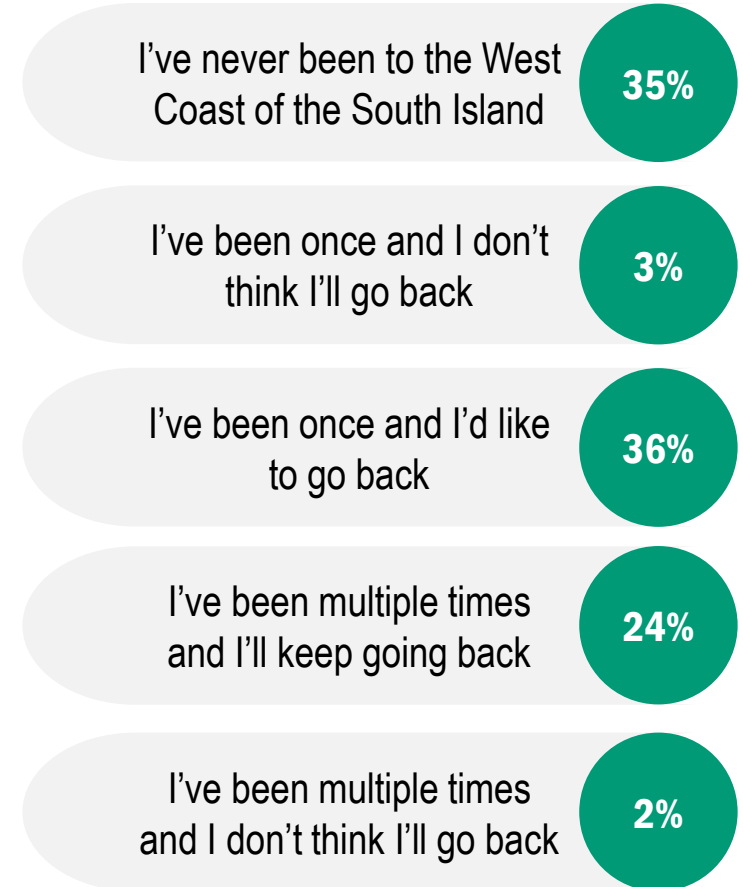
**Incredible bush
and coastline**

Glaciers



The opportunity we heard time and time again is that once you've been there, you'll want to go back

- As we were talking to those who had been on a trip to the West Coast, it always came up that they had something left unfinished that they'd love to go back and do
 - There was a sense that it's truly hard to understand all the things you can do there until you visit
- We're so vast and interesting, this happens naturally. We heard stories of people coming over for Wild Foods, or the Greymouth Bike Race, and racking up lists of things to do the next time they returned
- This was reflected in the survey we ran... of those who had been to the West Coast before, 92% want to return



SO: We need to think about how we get visitors there the first time, and then our natural assets and interesting people bring them back

A person wearing a wide-brimmed hat is seen from the back, looking out over a tropical landscape. The sun is setting behind a range of hills, creating a golden glow and long shadows. In the foreground, there are lush green plants and ferns. The overall mood is serene and contemplative.

**Let's now unpack the EMOTIONAL
NEEDS**

In our experience, domestic travelers are looking for a mix of four needs when dreaming & planning a trip

The 4 MINDSETS we know drives travel behaviour and planning

Play

A trip surrounded by fun and activities that bring you together

Thrill

Seeking a departure from the road well trodden / a younger mindset

Refresh

A 'flop and drop' location focused on food, drinks and comfort

Knowledge

Passing of knowledge and appreciation of where you/or others have come from

We confirmed these four needs still represented what was required to start the DREAM phase, but pivotally what was important to begin the PLAN phase...

What will my holiday be made up of and what will I be doing?

For this process, we created five distinct territories based on these needs

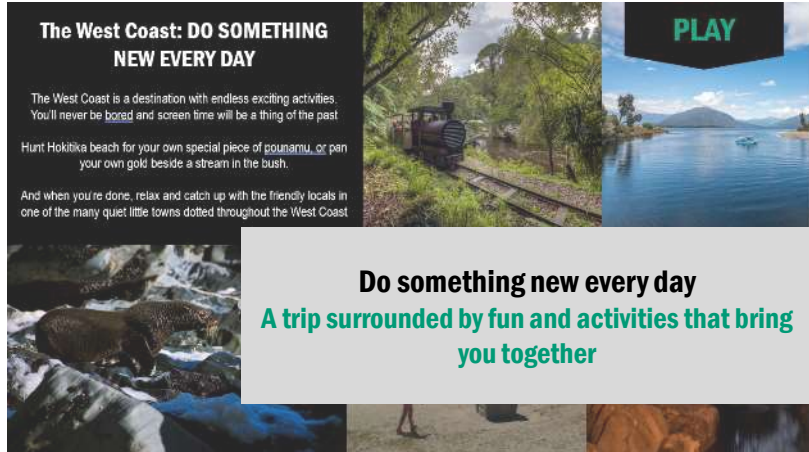
The West Coast: DO SOMETHING NEW EVERY DAY

The West Coast is a destination with endless exciting activities. You'll never be bored and screen time will be a thing of the past.

Hunt Hokitika beach for your own special piece of pounamu, or pan your own gold beside a stream in the bush.

And when you're done, relax and catch up with the friendly locals in one of the many quiet little towns dotted throughout the West Coast.

PLAY



Do something new every day
A trip surrounded by fun and activities that bring you together

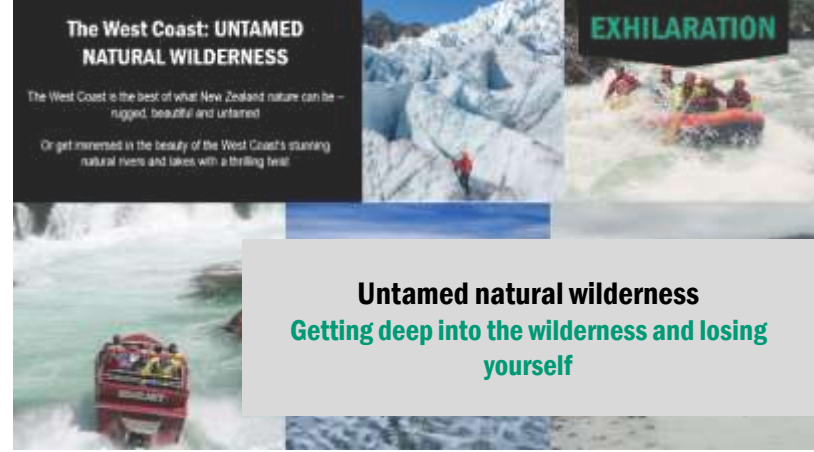


The West Coast: UNTAMED NATURAL WILDERNESS

The West Coast is the best of what New Zealand nature can be – rugged, beautiful and untamed.

Or get immersed in the beauty of the West Coast's stunning natural rivers and lakes with a thrilling treat.

EXHILARATION



Untamed natural wilderness
Getting deep into the wilderness and losing yourself

The West Coast: GENUINE SURPRISE

The West Coast is the perfect balance of fun, excitement and relaxing in between.

Be surprised every time by the diverse landscapes, people and experiences in the region. Be free to be truly you!

While it's wild, there's still a great selection of comfortable accom, good coffee, and the craziest Instagram photos.

PLAY



Genuine Surprise
Showing off the both the tame and the untamed sides of the coast... showcasing how much there is to do

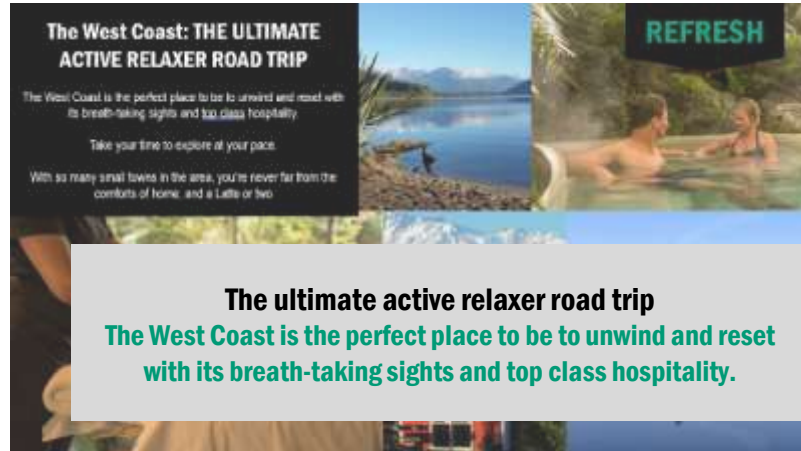
The West Coast: THE ULTIMATE ACTIVE RELAXER ROAD TRIP

The West Coast is the perfect place to be to unwind and reset with its breath-taking sights and top class hospitality.

Take your time to explore at your pace.

With so many small towns in the area, you're never far from the comforts of home, and a Little or two.

REFRESH



The ultimate active relaxer road trip
The West Coast is the perfect place to be to unwind and reset with its breath-taking sights and top class hospitality.

The West Coast: AOTEAROA'S OUTDOOR MUSEUM

Take a trip where you come home knowing more than when you left.

The West Coast has a wealth of riveting history, natural wonders and engaging wildlife – everywhere you turn there is a story to be told and something to learn more about.

Go deep into the most undiscovered parts of New Zealand.

KNOWLEDGE



New Zealand's outdoor museum
Passing of knowledge and understanding about New Zealand's pioneer past, as well as getting hands on with NZ's flora and fauna

And how did they perform?

Unsurprisingly, those based on activities and relaxing had wide appeal

But the spread of appeal shows that the Coast has the ability to meet the needs of a wide set of travellers

The West Coast: DO SOMETHING NEW EVERY DAY

The West Coast is a destination with endless exciting activities. You'll never be bored and screen time will be a thing of the past.

Hang - drink a beach for your own special piece of coastline. Let your own gulf breeze a stream in the bush.

And when you're done, relax and catch up with the friendly locals in one of the many quiet little towns dotted throughout the West Coast.



PLAY

29% favourite

The West Coast: UNTAMED NATURAL WILDERNESS

The West Coast is the best of what New Zealand nature can be - rugged, beautiful and untamed.

Or get immersed in the beauty of the West Coast's stunning natural sites and sites with a little help.



EXHILARATION

22% favourite

The West Coast: AOTEAROA'S OUTDOOR MUSEUM

Take a trip where you can have something more than when you'll.

The West Coast has a wealth of making history, nature wonders and amazing views - everything you can find from a story to be told and something to treasure here.

Go deep into the west and discover parts of New Zealand.



KNOWLEDGE

10% favourite

The West Coast: THE ULTIMATE ACTIVE RELAXER ROAD TRIP

The West Coast is the perfect place to be to unwind and road with its breathtaking sights and top class hospitality.

Take your time to explore your pace.

With so many great beaches in the area, you'll never get from the comfort of home, not a 100 or two.



REFRESH

24% favourite

The West Coast: GENUINE SURPRISE

The West Coast is the perfect balance of fun, excitement and relaxing in between.

Be surprised every time by the diverse landscapes, people and experiences in the region. Be here to be truly good.

While it's wild, there's still a great selection of comfortable accommodation, good coffee, and the craziest things you'll find.



PLAY

14% favourite

Unprompted, we heard a lot about how much there is to do on the coast, so when they saw this territory, it really resonated

Activities are central to a Kiwi family trip, and this territory talked directly to that

- ✓ Key to this is a VARIETY of activities so consumers can experience as much as possible
- ✓ Having options is appealing – fast and slow paced
- ✓ New activities that people have not done before

But it does reinforce a challenge we heard about the West Coast feeling like it required a dedicated amount of time to experience properly

- ✗ However, it can feel like this is talking to a seven day plus itinerary, which is currently hard to justify in NZers minds



"It describes my idea of a perfect holiday. Relaxing but with many points of interest and plenty of things to explore and discover."

Highlighting the wide variety of activities to do is extremely appealing to tourists visiting the region

Activities where consumers could relax was a territory that was widely accepted, but can feel a little slow

Consumers appreciate a holiday when they can wind down and relax for a change, which this territory targeted

- ✓ Surprising people with the activities that they could wind-down was well liked
- ✓ Connecting with nature - ability to do activities in the natural environment
- ✓ Luxurious activities make consumers feel special

But it can highlight one of our negatives as a region, that we are TOO slow

- ✗ However, slow paced activities are difficult to do if you are travelling with children
- ✗ Costly activities that can make it an expensive holiday



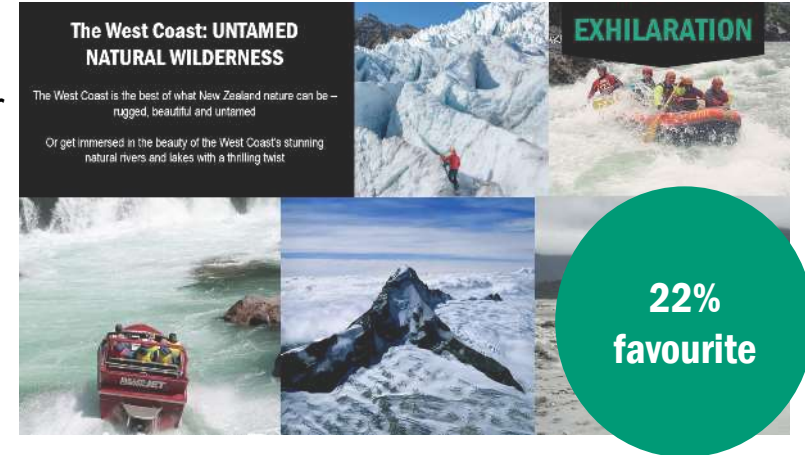
"I like the idea of soaking in hot pools getting a massage and a bit carefree canoeing looked inviting."

Providing a relaxing holiday for people where they could slow down from their busy lives was very enticing

When we focused on Exhilaration, there was a sense that it fit well with out natural assets

It made 'ruggedness' a positive that added to the exhilaration

- ✓ 'Untamed natural wilderness' as a tagline talked straight to why these activities are better on the West Coast
- ✓ Targeting natural unspoiled beauty while being adventurous was like among those who enjoy being in the outdoors, regardless of the weather
- ✓ Presenting landscapes that are not seen anywhere else in the country makes the West Coast even more special for travelers



It can feel a little similar to Queenstown

- × They can already do *similar* things in places that are easier to get to
- × A sense these activities would be expensive, and they'd only do one or two
- × High intensity activities that are not suited to everyone

"I love mountains covered with snow and rafting is the greatest adventure for me"

Making the most of a holiday for some was seen in seeing new heights and exploring new areas

The more 'social'/people oriented version of Play didn't resonate

Focusing on our people is part of the rich tapestry of the West Coast

- ✓ Similarly, the key with this territory was family-orientated activities that are friendly on the budget
- ✓ Travelling to unusual places that people had never been seen before or didn't know existed

But it shouldn't be at the centre, it felt a little hard to promise

- ✗ High expectations of 'local' interactions that might leave travellers disappointed
- ✗ That a holiday is about who they were travelling with, not interacting with locals
- ✗ However, consumers saw many similarities to Rotorua made it feel not as unique to the region



"It's everything I would want to go to and see when I'm there."

People like to be surprised when they go travelling and thought that the West Coast could offer a unique experience with their loved ones

Meanwhile, those who wanted to learn about the region and the history were drawn to the knowledge territory

We have a unique version of history that is rare in other parts of NZ, especially the North Island

- ✓ Those who love history want to know what is unique about the West Coast
- ✓ It blended natural and human histories

Knowledge is best 'peppered' through a holiday to ensure everyone is engaged

- ✗ Don't want the whole holiday to be all about learning and can be challenging with children
- ✗ Not as exciting as the other territories
- ✗ Niche and not what many would centre a holiday around



"I am a history buff and visit historical sites overseas yet do not really visit New Zealand's historical sites which are as valid."

Seen as a much slower and interesting holiday where consumers will be able to learn something, which does have its limits

We also tested ‘Untamed Natural Wilderness’



The tagline worked generally for most consumers we spoke to – it highlighted our biggest natural asset... our natural beauty. So for someone looking for a holiday in the wildest parts of NZ, it's perfect

But the ‘untamed’ part can make some question whether a West Coast holiday will be ‘roughing it’... we do need to soften this for some comms executions and think about how one persons ‘tame’ can be another’s ‘untamed’

What might ‘untamed’ look like in each case?



Do something new every day
A trip surrounded by fun and activities that bring you together



The ultimate active relaxer road trip
The West Coast is the perfect place to be to unwind and reset with its breath-taking sights and top class hospitality.



New Zealand's outdoor museum
Passing of knowledge and understanding about New Zealand's pioneer past, as well as getting hands on with NZ's flora and fauna



Untamed natural wilderness
Getting deep into the wilderness and losing yourself

THE FUNCTIONAL DRIVERS

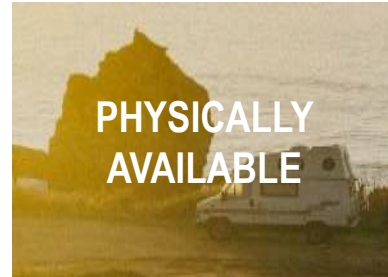


It's a combination of these 5 drivers that shift us from dreaming to planning

Is it...



Being front of mind
when I think about an
NZ holiday



How long does it take
to get there and how
hard is it to travel
around



Having both the time
and the financial
capability to afford to
do what I want to do



Something to get look
forward to and can't
wait to post on
Instagram



Even in a storm I will
have something to do,
a comfortable spot
and not feel like I've
missed out

AND WHILE NOT ALL NEED TO BE PERFECT, THERE'S GOT TO BE ENOUGH
POSITIVE ELEMENTS TO **BALANCE** OUT THE COMPROMISES

THE MORE OF THESE DRIVERS THAT ARE ALIGNED **THE FASTER OUR DECISION
MAKING BECOMES**

We are up against well trodden and widely recognised NZ holiday destinations that are often front of mind

- Queenstown, Christchurch, Nelson, were all coming up as places consumers were thinking about as a holiday before we were being considered
- A sense that it would involve a lot of effort to plan... finding the time to understand what there was to see and do felt like it would take a considerable amount of time
- Lack of awareness is a major barrier right now. People don't know enough about the West Coast or what it has to offer to feel confident starting the process of planning

Q1. I think about the West Coast as a destination I'd like to go on holiday often

MENTALLY AVAILABLE

Strongly Agree, 17

Slightly Agree, 32

Neither nor, 20

Slightly Disagree, 19

Strongly Disagree, 11

S0: We are up against a number of well trodden and widely recognised NZ holiday destinations that will take some beating

The mountains that surround us are a blessing and a curse

- Many people perceived the West Coast as a far away destination that was difficult to get to
- Even those close by think it's a tough drive, even when close. Compounding this, there are no direct flights from Auckland.
- That needing a rental car to get around once they're here adds to this too. Especially if they are driving one way and additional fees start to pile up

Q2. I think it's easy to take a holiday to the West Coast

**PHYSICALLY
AVAILABLE**

Strongly Agree, 12

Slightly Agree, 30

Neither nor, 23

Slightly Disagree, 27

Strongly Disagree, 8

S0: This will always be a challenge. However, a challenge that can be overcome by increasing other drivers and showing the benefits of the self drive trip up and down the coast

Our physical availability challenges has contributed to an assumption we're an expensive region to travel around

- We have a legacy perception that flights are still expensive for domestic travel in NZ, that the value equation doesn't stack up
 - We still can't help but compare the cost of our flight to that of a full tank of petrol, and rentals are a grudge purchase
- But from those that had been to the West Coast, they were surprised how good value it was once they arrived. From activities, to accommodation and food, being seen as great bang for buck
- Especially when it came to experiencing nature, birds, and animals up close for free

Q3. I think the West Coast is a cost effective place to go on holiday

WITHIN MY MEANS

Strongly Agree, 12

Slightly Agree, 31

Neither nor, 36

Slightly Disagree, 16

Strongly Disagree, 5

SO: Kiwis already think that the best of NZ is seen for free... how can we show that a West Coast holiday is the ultimate expression of that?

We're more aspirational than we may have thought

- That we DO have something they can share, show off and be proud of once the trip was over, we just need to lean into them more. No one gets sick of seeing photos of the blowholes, arches or blue rivers
- This is where 'Untouched natural wilderness' came into its own, we have sights and scenes that are easily sharable and not replicated anywhere else
- The list of activities to do on the West Coast may be endless but what needs works is creating greater awareness of where to start, think 'the Queenstown Starter pack' - The Onsen hot pools, Ferg burger, the jet boat, a photo in front of the lake... all well trodden places to start a journey

Q4. I think a holiday in the West Coast is aspirational

ASPIRATIONAL

Strongly Agree, 23

Slightly Agree, 32

Neither nor, 29

Slightly Disagree, 11

Strongly Disagree, 5

SO: We have a number of spots that can become our Wanaka tree... there is a lot of momentum we can build through grass roots sharing of some of the best parts of our region

Sample of 1167 people

Most importantly, they think the West Coast is fascinating

- That as a region we have a number of interesting and different things to do. An endless amount of natural and human-interest activities throughout the west coast that would take years to see everything properly
- It seemed like each person we spoke with had a different specific interest they knew about and wanted to explore further on the coast, whether it be hiking the great walks, craft beer, the glaciers, motorbikes... there was something for everyone
- We have a wealth of interesting things we can talk about, we just need to pick a few to make more famous!

Q5. I think the West Coast is an interesting place to visit

INTERESTING

Strongly Agree, 43

Slightly Agree, 41

Neither nor, 10

Slightly Disagree, 4

Strongly Disagree, 3

As a functional driver, interesting is a strong pull, that once combined with a better Mental Availability score, will help us overcome some of our other physical and cost-based challenges that are hard to change

Sample of 1167 people

Middling Mental and Physical availability scores mean we currently aren't an 'easy' destination

BUT with Interesting and Aspirational being our lead drivers, we are in better space than many

Both are strong pull factors that help enable the planning process. Once combined with a better Mental Availability score, will help us overcome some of our other physical and cost-based challenges that are hard to change

MENTALLY
AVAILABLE

PHYSICALLY
AVAILABLE

WITHIN MY MEANS

ASPIRATIONAL

INTERESTING

Throughout this process, we spoke to those who had been to the West Coast

We found four reoccurring personas

**THE INTREPID
EXPLORER**

THE ROUND TRIPPER

FAMILY GETAWAY

THE UNWIND WEEKEND

THE INTREPID EXPLORER

**“RUGGED. I THINK THEY SHOULD
LEAN INTO IT. IT TRULY IS THE
MOST WILD AND RUGGED PLACE
IN NEW ZEALAND, DOESN'T THAT
SOUND EXCITING?”**

INTREPID EXPLORER

Looking for some of the wildest and remote spots in New Zealand. That the further from civilization the better and lack of amenities is almost a plus

Singles
&
couples

Any
age

VIEWS ON HOLIDAYS

Want to discover something new that they can't see anywhere else, even if this means going to new heights

- Are seeking new experiences that are unique and are off the beaten track

That there is value in doing something that no one else has in their immediate group

- That a long trip to get there isn't a negative if the experience is exceptional

They're more down to earth than the jet boat thrill seekers... a good trip is about not knowing where they'll end up

What is missing for them at the moment?

We're a perfect destination for them. We need to make the most of our ruggedness here and promote it with adventurous and free spirited visitors. Capturing them is about building the collective myth of the West Coast

LEAD EMOTIONAL NEED

EXHILARATION

LEAD FUNCTIONAL NEED

INTERESTING

KEY ACTIVITIES

Great walks

Multi day camping trips

Being able to just drive and stop/stay where they end up

Epic lookouts

ROUND TRIPPER

**“I’VE ALWAYS WANTED TO DRIVE
AROUND THE SOUTH ISLAND. IT’S
THE BEST WAY TO TRULY
EXPERIENCE ALL IT HAS TO
OFFER”**



ROUND TRIPPER

We're a default destination for those wanting to do the south island 'properly'... typically down the east coast and up the west coast. The 'bucket list' trip in which they want to say they've ticked off everything they can in the south island



Singles & couples

Younger

IEWS ON HOLIDAYS

Let the road lead the way

- They want a spontaneous holiday that lets the road take control and does the planning for them

But help me get excited for the next step

- Giving them motivation to get to the next spot and some anticipation around what they might see and do

Trying to see everything that they possibly can and capturing it all on camera for their social media. They want to get off the beaten track, but not too far from their car

What is missing for them at the moment?

Offering an itinerary of stops and iconic places to help them feel like they've 'done it all'

LEAD EMOTIONAL NEED

PLAY/
EXHILARATION

LEAD FUNCTIONAL NEED

ASPIRATIONAL

KEY ACTIVITIES

Signs along the road with lookouts/ walks

Instagram photos

Quirky cafes and towns

FAMILY GETAWAY

**“IT’S GOTTA FEEL LIKE A HOLIDAY
FOR EVERYONE. AN INCLUSIVE
TRIP THAT HAS SOMETHING FOR
EACH MEMBER OF THE FAMILY TO
LOOK FORWARD TO”**



FAMILY GETAWAY

Seeking a family holiday where they can reconnect as a family and get a detox from the electronics. Wanting a true Kiwi holiday with a variety of activities that will keep everyone entertained in the outdoors



Families

Skewed
Younger

IEWS ON HOLIDAYS

Wants the kids to be entertained

- Need for enough activities for families with children to do that doesn't cost too much

Value in spending quality time with everyone

- Hoping that everyone can get out in the outdoors where they can detox from all the electronics and enjoy New Zealand's rugged backyard

They are wanting to spend time as a family and show the kids a different part of New Zealand that has a lot of fun things for them to do.

What is missing for them at the moment?

We have an endless list of activities for families to do so we make a great destination. However, worrying that the trip is going to get expensive is a worry when somewhere like Rotorua is within driving distance for Auckland.

LEAD EMOTIONAL NEED

PLAY

LEAD FUNCTIONAL NEED

WITHIN MY MEANS

KEY ACTIVITIES

Variety of exciting a new activities

Learning about the history alongside fun/play activities

Cheap accommodation

THE UNWIND WEEKEND

**“NELSON HAS JUST BOOMED
RECENTLY AND I’M LOOKING FOR
SOMEWHERE QUIET TO SLOW MY
PACE DOWN AND TRULY RELAX”**

UNWIND WEEKEND

Those wanting an 'unwind weekend'. Escaping the city and looking to drive a medium distance to feel like they're away from the hustle & bustle. Looking for quiet, relaxed, comfy places that allow for them to 'disconnect'



Singles,
couples,
friends

Slightly
older

VIEWS ON HOLIDAYS

It's got to feel easy

- They are after a relaxing holiday so getting there and sorting accommodation must feel easy and not contribute to the stress they feel day today

The company is what makes a trip

- Sharing the experience with loved ones or a group of close friends is important... how can we show them it's a trip worth doing with loved ones?

Often anchor a trip around an event

- Gigs, cultural events, reasons to get out of their town and allow them to have a reason for their trip

They are creatures of habit, and finding a place that ticks their boxes as a 'go to' spot

What is missing for them at the moment?

We're seen as a place to unwind, but even for those in CHCH we just feel a little far away. How are we going to promise a better unwind proposition than Hamner or Tekapo?

LEAD EMOTIONAL NEED

REFRESH

LEAD FUNCTIONAL NEED

**PHYSICALLY
AVAILABLE**

KEY ACTIVITIES

Sleep / Relaxation

One specific 'thing'

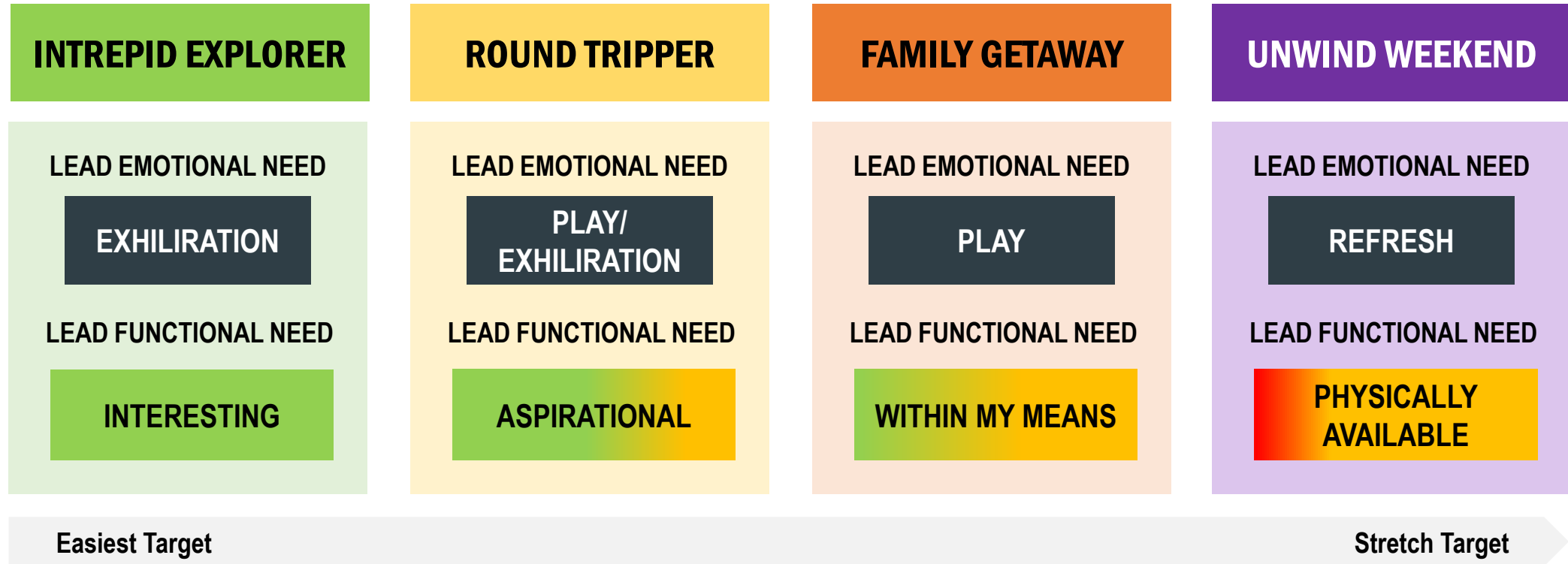
Amenities close by

Cosy accom

A few small things to
pepper throughout the
short trip

Massages and hot pools

Bringing it all together, the personas that will be the easiest to engage are already aligned with our natural assets and how we do things



Capturing our stretch targets will require us to message around their core emotional needs and developing strategies to tackle their more challenging lead functional drivers

A person wearing a blue jacket and a backpack is standing on a wooden walkway with a metal railing, looking out over the ocean. The scene is set during sunset or sunrise, with a bright sun on the right side of the frame creating a lens flare. The sky is filled with soft, colorful clouds. The overall mood is serene and contemplative.

RECOMMENDATIONS

The defining narrative we heard from people is that once they've visited the West Coast, the challenges we have with physical and mental availability reduce

Our challenge is acquisition, not retention

The West Coast: Once is never enough



But what will start this process? Three defining narratives we need to change

Tell them what we have

The biggest challenge. Right now consumers are assuming more than knowing

First step: Focus on the obvious. Highlight Glaciers, Pounamu, Hokitika Gorge, Punakaiti Rocks to solidify a few 'destinations' in the minds of consumers

Next Step: How might we link them all together to build a road trip proposition?

Show them it's not too rugged

While 'Untamed Natural Wilderness' works well to describe what we have, it needs to be followed up with the fact you don't need to 'rough it'

First Step: Focus on the cuisine and nicer accom we do have

Next Step: Build a narrative around each one of our towns AS WELL as the nature around them

Help them see that the rain doesn't take away from the trip

Less of a big challenge than we may have thought. More about how we communicate than it being a deal breaker for a trip

First step: How do we promote that each location has amazing activities, rain or shine?

Next Step: How might we focus more on summer trips, our beautiful coastline, the subtropical climate of



And we need to change how we tell our story based on some of the groups visiting us already

THE INTREPID EXPLORER

Myth building – make them sure they'll leave having had an adventure. THINK: Hike to one of New Zealand's most remote DOC hut

How does it look?



We know we've succeeded if... forward bookings of Paparoa and Pike29 increase

THE ROUND TRIPPER

Setting the itinerary – keep them excited to get to the next town and creating landmarks
THINK: Promoting each town to talk up the next stop down the road

How does it look?



We know we've succeeded if... we 'reduce the rush'... get them spending more time West than East

FAMILY GETAWAY

Value once arrived – show them it's a bang for buck one of the best trips you can take
THINK: The 'free-est' family activities on the coast

How does it look?



We know we've succeeded if... more kids have a little vial of gold flakes in their bedrooms year on year

THE UNWIND WEEKEND

Compartmentalise the Coast

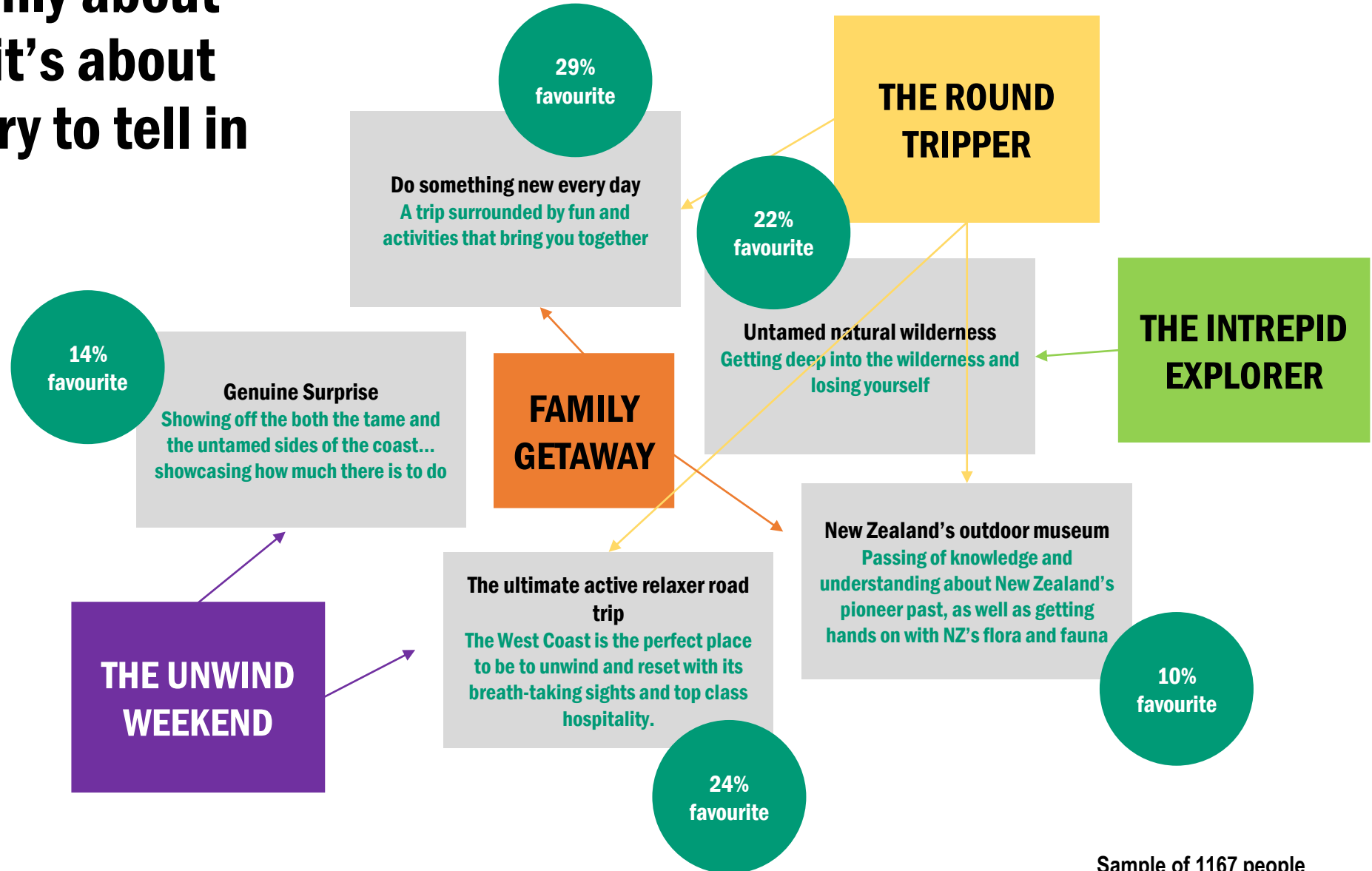
– make it feel like an easy getaway. THINK: More food festivals, top 10 Bush AirBNBs

How does it look?



We know we've succeeded if... we have a full calendar of events to entice them over the alps

Which means when it comes to needs it's not only about doing really well, it's about having a clear story to tell in each space



And showing off a bit more

- We have a destination that is both aspirational and interesting, just not top of mind and a bit hard to get to
- If we focus on salience and making ourselves more front of mind, the easier it will become for consumers to accept our challenging physical location
- It's about building the 'reason why' just that first time. Once we have them in the door, they'll come back for more

Where would we start?



MENTALLY
AVAILABLE

PHYSICALLY
AVAILABLE

WITHIN MY MEANS

ASPIRATIONAL

INTERESTING

Giving each one of our towns a singular specific reason 'why' in the minds of consumers

- Having the ability to think 'Reefton has X', 'I can't wait to get to Hokitika to do X' allows consumers to compartmentalise what we have to offer, to pick and choose what they want to experience, and not overwhelm themselves
- We have already started this process with the Glacier County reposition, but we need to continue down this path throughout the coast to create higher salience of each of our towns with consumers

This begins to tackle our challenge of cutting through (without spending a lot) and starts to build 'the dream' in all consumers

THINK: Mountain reflections at Lake Brunner, making Hokitika New Zealand's 'pounamu centre', Reefton being a living Settler village

HOKITIKA
GORGE

LAKE
BRUNNER
UNTAMED NATURAL WILDERNESS

HAAST
WORLD HERITAGE
UNTAMED NATURAL WILDERNESS

OPARARA
ARCHES
UNTAMED NATURAL WILDERNESS

GLACIER
COUNTRY

PANCAKE ROCKS
BLOW HOLES
UNTAMED NATURAL WILDERNESS



This has been a One Picture presentation

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