




Unlocking the value of future tourism

The voice of New Zealanders

Prepared for The Tourism Taskforce

By One Picture

Fieldwork conducted September & October 2020



For this project we had five big objectives:

1

How have the values of New Zealanders shifted?

2

*What do New Zealanders perceive as the impact of tourism on **their country, and what's changed since COVID-19?***

3

What are New Zealanders current and future expectations of tourism, domestic and international?

4

*What does sector '**success**' look like for the country as a whole and at a regional level?*

5

What does a long-term view of tourism need to take into consideration to meet these new needs?

To answer these we completed 9 Focus Groups with New Zealanders, and 26 In-Depth Interviews with tourism operators

		IDIs <i>with operators/business owners</i>	FGs <i>with locals</i>	Medium
		1 hour	2 hours- 6 to 8 participants	
METRO GATEWAYS	AUCKLAND	2	2	ONLINE
	CHRISTCHURCH	2		
	WELLINGTON	2		
TRANSITIONAL	HOKITIKA	2	1	ONLINE
	INVERCARGILL	2		
	WHANGAREI	2	1	ONLINE
	NEW PLYMOUTH	2		
SEASONAL	TAUPO	2	1	ONLINE
	RUPAEHU	2		
TOURISM HEAVY	ROTORUA	2	1	FACE TO FACE
	TAURANGA	2	1	FACE TO FACE
	NELSON	2	1	FACE TO FACE
	CENTRAL OTAGO / QUEENSTOWN	2	1	FACE TO FACE
		26	9	

- All actively considering travelling domestically in the next 6 months
- Even splits between younger vs older (ranges TBD)
- Ethnic mix that reflects each region. Even male/female split
- Inclusion of small business owners as well as those that work in the industry – no more than 15% of total sample
- Operator interviews included a spread of smaller and larger operators

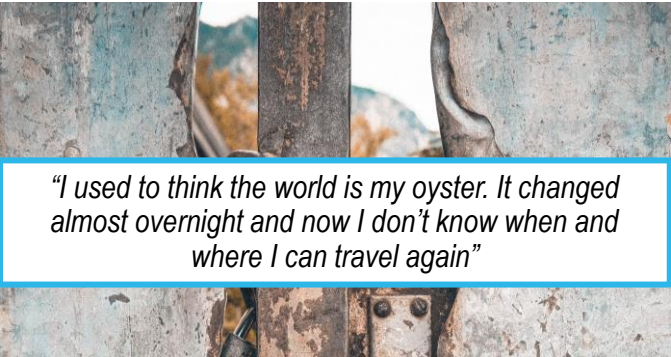


Chapter #1. The Changing Travel Mindset

When asked to think about 'travel', there is a sense of losing something significant - and we are still grieving what we have been forced to give up

ACCESSIBLE TO UNAVAILABLE

Travel has traditionally been a rite-of-passage for New Zealanders. A far away country where travel connected us to the world. We felt entitled to travel and enriched when we did. We are now forced to accept that it might be a long time before travel goes back to being as easily available as it was



"I used to think the world is my oyster. It changed almost overnight and now I don't know when and where I can travel again"

EXCITING TO UNCERTAIN

The joy and excitement of planning has been replaced with anxiety around what might go wrong and a sense of uncertainty around the tourism trajectory. **Disruption that's occurred even for domestic travel** now has many questioning whether travel is worth it



"Booking a trip used to be simple. Now there is so much uncertainty and no one seems to know when the situation would go back to being even remotely normal"

ASSURED TO UNSAFE

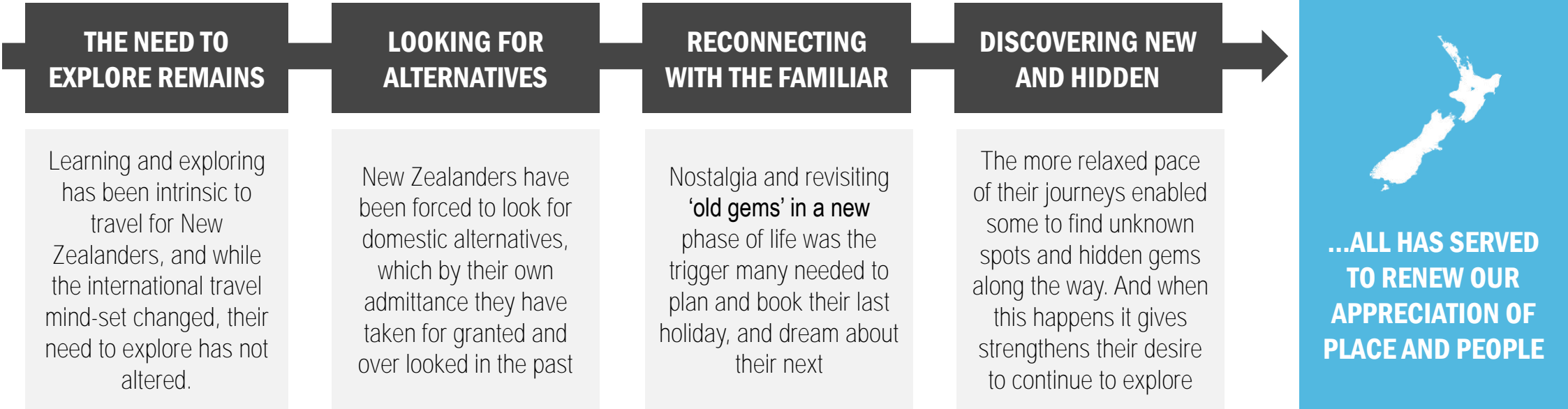
Safety is the new lead practical hurdle to air travel, something we used to take for granted as intrepid travellers. There was a general sense of reluctance for out-bound travel due to distrust in in other countries, making many believe they will be inviting others in bound, or staying domestic themselves



"I won't be jumping on a flight even after the borders open. There are not many places in the world that look particularly attractive now with their COVID situation."

SO: It feels like pent-up demand is easing as we start to question how long it will be before we feel confident to travel again. And our preference is for others to come to us rather than us go to them


Exploring is still in our nature, and the inability to explore overseas destinations is making us look more closely at our own backyards



SO: What started as a forced choice turned into a greater appreciation for what our own country has to offer, and a realisation that (in some cases, after years of neglect) it is able to exceed some of the well trodden international hot spots – think Fiji!

What New Zealanders are now missing the most is the ability to reunite with loved ones

- Connecting emerged as the lead driver for New Zealanders to start thinking about travel... more than even some of the traditional bucket list trips
 - We heard stories of sick loved ones, separated grandparents and families facing Christmases apart for the first time
- This is creating a new in-bound visitor target as well as solidifying the continued desire for domestic travel
 - VFR (Visiting Friends & Relatives) have traditionally been a secondary target to IPs (Independent Professionals) and ABs (Active Boomers) that we used to focus on



“I used to travel to UK every year to see my family. Now I don't know when I will be able to see them again”

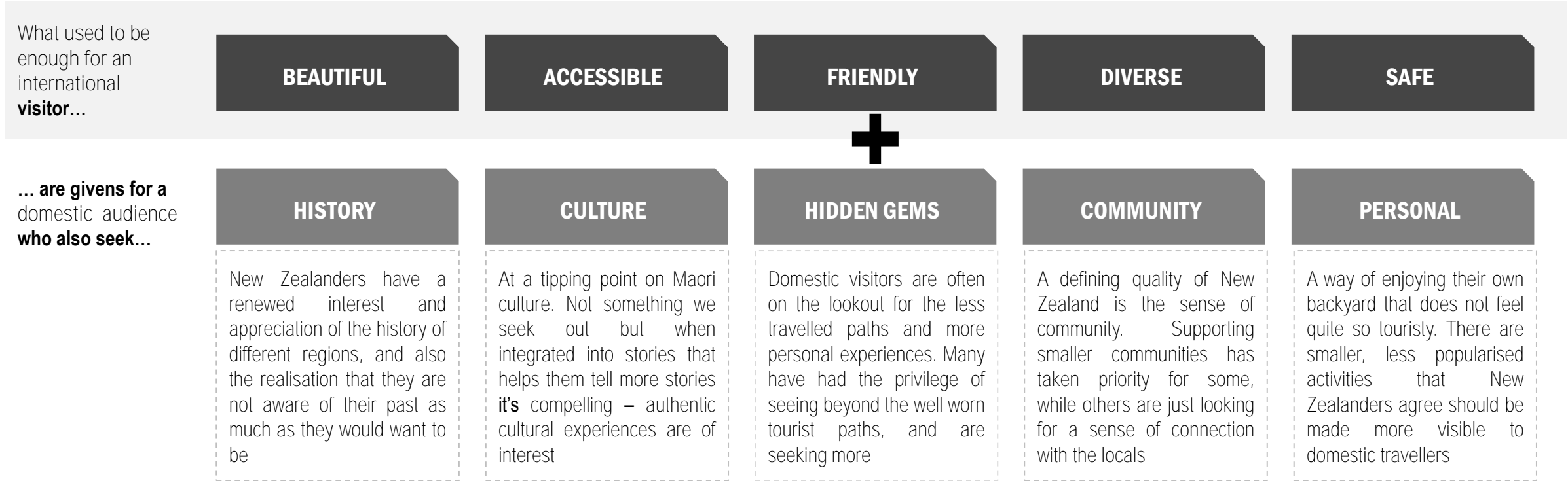
SO: Friends and family is likely to be a lead travel trigger and a motivator for inbound travel as we continue to be seen as a ‘safe destination’

SO: If what New Zealanders are feeling and missing is the same as those in other markets, a desire to seek connection is likely to be a lead trigger for our first visitors, albeit with a cautious mindset. We need to ensure New Zealanders share what they have done and discovered in their own country while they have been apart



Chapter #2. The Domestic Quest

New Zealanders already know what makes our country ‘special’. When parting with their money they’re seeking what makes us *unique*



SO: Deepening the experiences is key for the domestic market to stop them believing they might run out of things to see & do

And let's not forget, we are a hard group to please! We heard...

'TOO TOURSITY FOR ME'

There is a perception that tourism in New Zealand has been tailored for the international markets with higher average disposable incomes, which limits the activities and experiences domestic travellers choose to engage in

'TOO EXPENSIVE FOR ME'

New Zealanders find it difficult to justify spending extensively on domestic experiences., There is a deep set notion that their own backyard should not cost them a fortune

'TOO REGULAR FOR ME'


Domestic visitors are now looking at experiences in New Zealand to give them the same level of sense of special and different that they get from an overseas trip. This means that their expectations are set fairly high

'TOO HARD TO KEEP EVERYONE HAPPY'

Families form a major chunk of the domestic tourism market, so they are always on the hunt for places and activities that are enjoyable and affordable for everyone. This also means being on a hunt for packages that cater to different family structures

'TOO MUCH AT ONE GO'

Compared to international visitors, domestic travellers usually have limited time to get around, so what are 'once-in-a-lifetime' experiences for international visitors, are easily put off for another time, further bringing down their overall spend



“For them it would be just 50 pounds, for us it’s \$100. And when you start thinking of a family of 4 doing the activity, that just becomes out of reach.”

SO: If we can meet the needs of a domestic traveller we can build a stronger international business, as we are working to please a more discerning buyer

Despite a traditionally ‘critical’ view of domestic tourism, New Zealanders know there is a multi billion dollar industry that’s now up to them to support, for the good of everyone involved

We have a domestic audience that know and accept that there is a short-fall and the tourism industry needs support

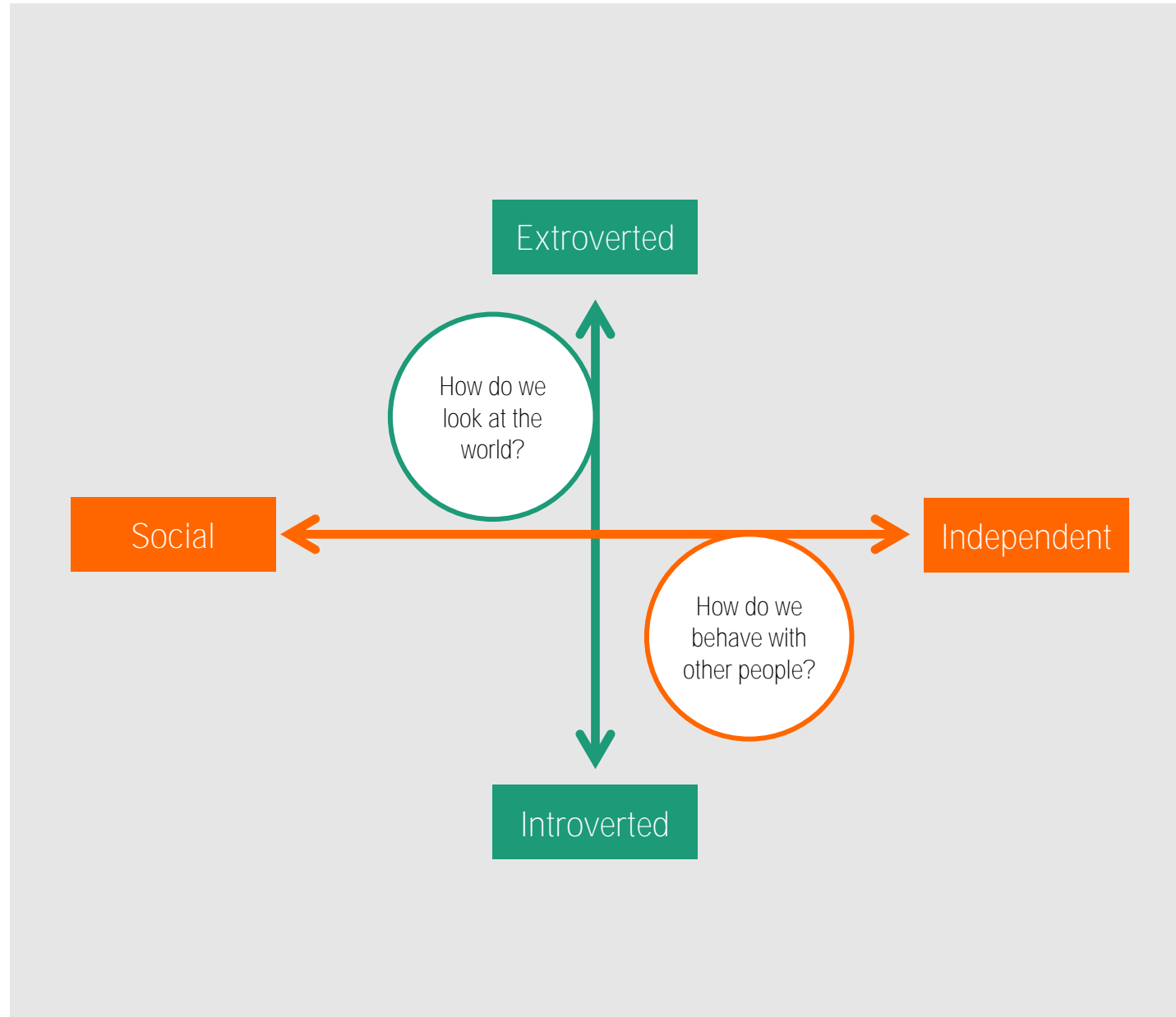
Who also broadly know that if we are to attract a quality international visitor back we need to have the infrastructure in place to entice them **here... and the industry won't be set up for this unless we help in the meantime**

New Zealanders are open and receptive to being asked to help keep our industry going, it just needs to be pitched in a way that lines up with the needs they look to fulfil on holiday

How does this look?

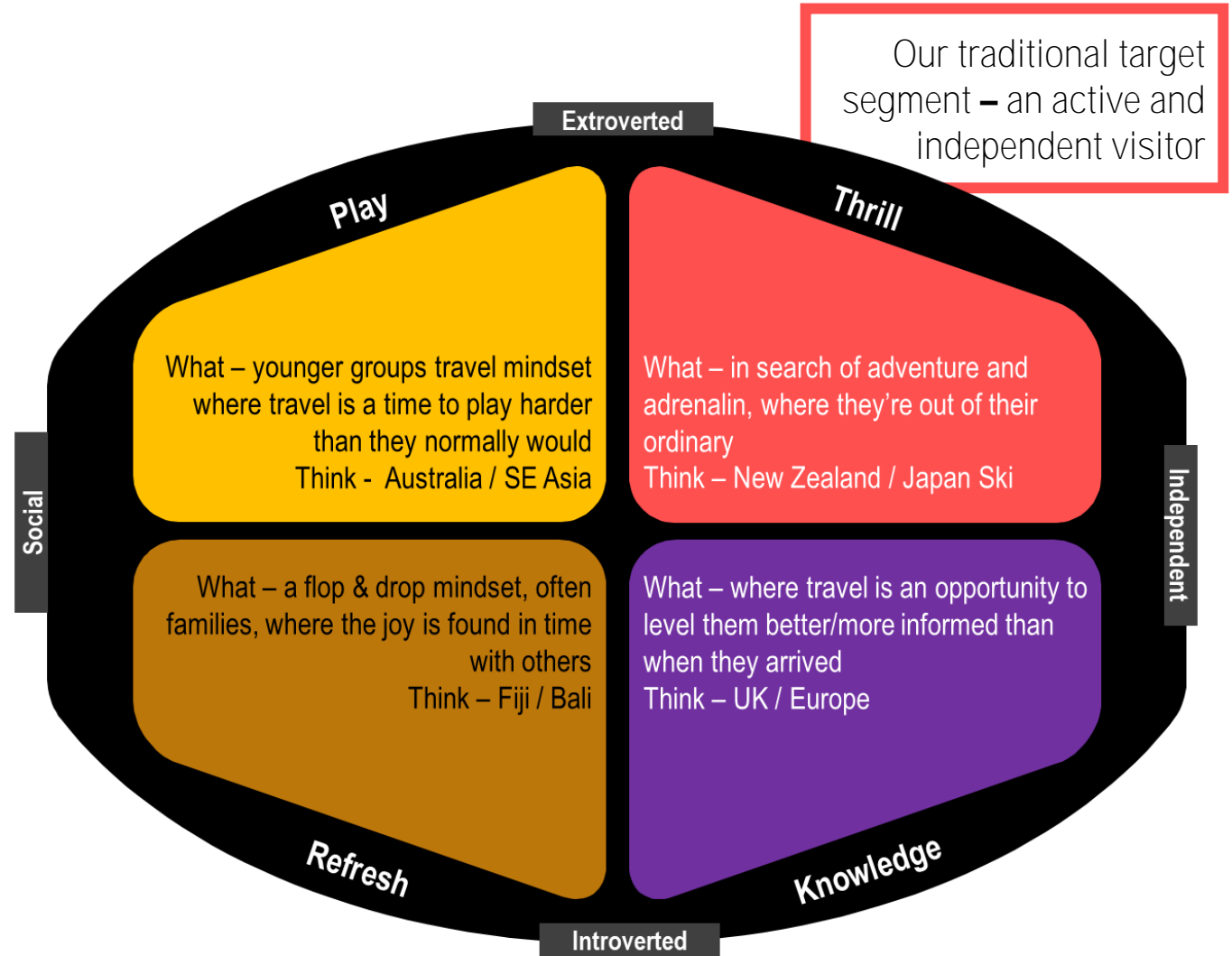
The needs of a domestic visitor ARE different and require specific targeting to activate what they see as valuable and worth paying for

We define these needs on two axis



Which uncovers four broad domestic visitor needs

- We have a domestic visitor that has traditionally looked out to different destinations to meet different needs
- & we have had a 'Active-Relaxer' mindset we have marketed ourselves to for International Visitors most likely to consider us
- So we have a gap in targeting for the other three, equally important visitor need states



SO: Getting the domestic audience to support requires a more sophisticated understanding of the market, their needs and what they are seeking from a holiday, and how they are fulfilling that need now in the absence of International tourism

Focusing on these needs helps us build value and fight the price consciousness we have seen from New Zealanders

The regions require a **re-positioning exercise** to overcome the perceived 'over familiarity' and apathy that we know exists with the domestic visitor

To do this, we need to **unpack what makes each region 'famous'**... why a trip there is unlike anything else in New Zealand

Everyone believed **greater alignment between RTOs** will help create a shift from low value day trips rather to high value journeys

This enables operators to **shift from seeing their business in isolation** to understanding how it fits in the regions, and wider New Zealand

SO: We need to help regions find their stories that are built around the unique qualities that naturally reside within each of them



When we probed on what would get New Zealanders seeing and experiencing the regions, there were some activities that came up consistently...

There was a lot of interest around what used to traditionally sit under Tourism New Zealand's special interests, aimed at an international audience at the time, re-surfacing with a domestic remit.

There is opportunity to help domestic visitors link what they want to do with how they want to feel when they are doing it

	Cycling	Walking	F&B	Events
REFRESH	Best Family Rides	Best short walk	Wine Capital	Ballet
THRILL	Great Rides	Best Great walks	Wild Food	Sport
PLAY	Winery hopping	Best Bar Crawls	Pie Capital	Lantern Festival
KNOWLEDE	Rail trail	Best City History Tours	Foraging tours	WOW

SO: We have an opportunity to turn regional assets into curated itineraries that appeal to the needs of our new captive audience

SO: There is a job to be done to find and champion the unique and interesting 'reasons why' for each destination so New Zealanders can feel confident that we can deliver an experience they are looking for



Chapter #3. Views of Tourism in COVID times

New Zealanders still appreciate the positive impacts tourism has had on their country



DEVELOPMENT

Tourism dollars as well as the increasing numbers have contributed towards creating better roads, infrastructure and services, which also benefits the locals

“The development has been massive. 10 years ago, Hokitika did not have what it does now”

No noticeable difference in how locals think about it



OPPORTUNITIES

Locals are aware of and appreciate the jobs that have been created in the experience, adventure and hospitality sector as a direct result of the growth in tourism

“It’s definitely benefitted the locals by creating more jobs, especially in hospitality”

Greater awareness as the sector suffers redundancies



REPUTATION

We have gone from being a small country at the corner of the world to a clean and green aspirational destination that the world has sat up and taken notice of

“I think the biggest benefit has been making New Zealand famous. Everyone knows us now”

Opportunity to boost due to our ‘almost’ COVID-free status



VIBRANT TOWNS

Many regions have gone from quiet and dull to becoming cultural hubs with a vibrant food scene, flourishing arts and craft centres

“I remember when everything in the town used to close by the evening. Tourism has added colour and spice to it”

A noticeable slowdown across regions



CULTURE GROWTH

Tourism has enabled our more isolated regions to broaden their cultural horizons by interacting with international visitors, and allowed New Zealand to share its culture with the world

“We are pretty isolated here in Invercargill, so it’s a great way for us to experience different cultures”

Seen as important but secondary to continued personal safety

Impact of COVID

SO: There are shared positives all New Zealanders can see when it comes to why it’s worth our while to welcome visitors back

But they are not looking at visitors through rose tinted glasses



GROWING SENSE OF PROTECTIONISM

There is a shift in our narrative from being open, inviting and friendly towards everyone to taking a cautioned approach to whom we let in through our borders, stemming from the desire to protect what we hold dear



DIFFERENTIATION BETWEEN VISITORS

How visitors travel while they are here is an **indication of how 'safe' and 'beneficial' they are** for New Zealand- freedom campers and group tours were the least suitable types of tourism in the current environment



'US' VS 'THEM' ATTITUDE

Even within our borders, there was a sense of concern and discomfort when receiving visitors from non COVID-free regions like Auckland. Aucklanders on the other hand often felt slightly discriminated against when travelling to other regions

SO: Absence hasn't made the heart grow fonder. We are going to need to work together as a group to bring all New Zealanders along on the journey as we re-open our borders

& there is also an awareness of the *strain* that tourism has on had on their community, and their country too

MAKING MY PLACE FEEL LESS SPECIAL

Excessive visitor numbers and cars in visitor hot spots are often an eye sore, and for the most popular tourism destinations, this is taking away some of the charm out of their place

MONEY TAKEN FROM MY POCKET TO FUND VISITORS

There is a growing disdain towards low value visitors with high impact. Locals find it unfair that their tax money is going towards maintaining their region and infrastructure while visitors can freely access these giving back little in return

MONEY CHANNELED OUT OF MY COUNTRY


Groups Tours booked through overseas operators means a significant percentage of the money going overseas, while the impact from the tourism is for New Zealand to bear

MY PLACE BECOMING FOREIGN TO ME

New Zealanders feel they are missing out on local love and familiarity in regions where there is a heavy reliance on international visitors to get the money flowing

THE GROWING DISPARITY AMONG MY PEOPLE

It's a high GDP earner, but a low wage industry- so in towns that have grown as visitor hubs, an average local finds it difficult to maintain even an average standard of living



“Tourism was at a tipping point before COVID. There were regions that were struggling with the increasing visitor numbers and relatively limited infrastructure to manage their impact, especially on the environment”

SO: While New Zealanders may be prepared to reconcile with some of the negatives, they are finding it hard to ignore the perceived hazards of tourism they are seeing as a result of COVID

But now, for the first time in a long time, they've been 'given back' parts of the New Zealand tourism experience that had been 'too busy' to consider in the past



Finding a spot to sit on Hot Water Beach

Being able to experience what we've all seen in tourism photos; a beach with space to dig a hole and sit in the hot water, without being drowned in the sheer volume of the crowd



A less crowded Queenstown

An area many considered 'full' and too busy to consider pre COVID. An experience made more interesting knowing they'd be surrounded by other New Zealanders and not visitors



Great walks with tranquility

The opportunity to do the Tongariro crossing without lines, and getting back the sense of wonder they had the first time they experienced a great walk

And that those who are normally at the forefront of these busy hubs are able to re-discover what made them fall back in love with **'their place'** and for the first time in a long time, not feel like they are living in a rush

SO: There are some experiences that New Zealanders aren't prepared to give back up lightly and this has helped cement the viewpoint we can't look to go back to the levels of visitors we had in the past

As such, the triggers that existed in the past still hold true- PLUS NOW, some new tension points



SO: As the negative aspects of living within a visitor heavy environment expand, there is more demand for further investment in better infrastructure and education to combat this



**SO: COVID-19 has been a reconsideration moment for all of us.
Forcing us to think about what balance looks like for our
tourism industry, our country, and ourselves when borders
reopen**

Chapter #4. Messages from our Tourism Operators

On how they're going...



AN APPRECIATION FOR THE SUPPORT FROM NEW ZEALANDERS

We heard more good stories than bad, and there was acknowledgment and a sense of appreciation for how New Zealanders have supported small businesses and operators



A REALISATION THAT DOMESTIC TOURISM HAS UNTAPPED POTENTIAL

Especially those with a domestic and smaller group focus are now feeling vindicated by their approach, and there is a general realisation that domestic tourism is more resilient than many gave it credit for



GETTING BY FOR NOW, BUT QUESTIONING WHAT'S COMING

That there are few who got through without losing any staff, and as wage subsidies are coming to an end, they are starting to think about what's next. A concern that at best they might 'just get by'

SO: It's a hard environment, but they're trying to find ways to either pivot or maintain the capacity to start up again once it's possible

What they're worried about...



THEIR ABILITY TO SUSTAIN UNTIL INTERNATIONAL TOURISM IS BACK

They are questioning how long domestic tourism can help them sustain the dip in business, and whether they will be able to pull through by the time borders open for international visitors. Some are even starting to consider alternative means of livelihood



BIG AND MASS WILL EAT THE SMALL AND BOUTIQUE

Concerns that the government will channel their money towards those who are biggest and loudest and that smaller and more local operators will not benefit as much from the support



DOMESTIC TRAVELLER WILL TAKE A BACK SEAT ONCE THE AUSSIE BUBBLE OPENS

That the Trans-Tasman bubble will open and that our gaze will turn offshore again- and inbound international travel may keep domestic visitors away if not managed correctly

SO: Certainty and the ability to plan doesn't exist, which leaves them not knowing exactly what they'll do next

And what their needs are going forward...



ATTRACTING VISITORS WHO CAN VALUE AND RESPECT WHAT WE HAVE TO OFFER

There is call for a sharper focus on a longer staying, more resourced visitors. There are concerns that we are getting a reputation for a cheap holiday, and by extension attracted visitors who try to get as far as possible on as less as possible, impacting our economy and environment



CHECK-INS ON OPERATORS TO ENSURE MINIMUM STANDARDS ARE BEING MET

Ensuring equal responsibility by all in protecting our environment while also providing safe and authentic New Zealand experiences to the visitors



CONSISTENT VISITOR GUIDELINES ACROSS NEW ZEALAND

When tourism starts back up, operators want standardised visitor behaviour guidelines (for instance consistent freedom camping rules across the country), as well as stringent implementation of the rules

Experience focused operators understand that discounts are not the answer- what they need is a national focus on improving the value proposition we are delivering

There were some other things that we heard consistently through our conversations

1

WE'VE CREATED AN INDUSTRY THAT IS FOCUSED ON THE DOLLAR

There was a boom that made for easy money, where many were not thinking deeply about the quality of the experience or their impact, but were focused more on maximising their profits

SO: These are the parts of a pre-COVID-19 industry that many would rather see left behind

2

MAORI CULTURE HAS BEEN UNDER VALUED AND UNDERSOLD

For visitors it's often the most compelling part of their trip. The higher level of intrigue and respect international visitors have for Maori culture points to the need of reconnecting to it ourselves

SO: Deepening our connection with Maori culture can add value to our tourism story. But needs to be done properly

3

THERE IS A NEED TO FOCUS MORE ON OUR CONSERVATION STORY

'Conservation' is a higher value story than 'natural beauty' as it is one based in care & how we look after our place, rather than just what we have- and we need start talking more about it

SO: Our place is well positioned- adding in a layer of how we look after it can help protect and promote it better

4

AND THE OPPORTUNITY TO SCALE UP AUTHENTICITY

Taking the boutique 'experience' focused approach and adopting it to mainstream activities is a way that we can start to build authenticity into every area of the visitor journey. A shift away from 'bums on seats'

SO: It doesn't have to be one or the other- we can build in the unique NZ way into every experience

And above all, there was an overwhelming sense that regions need to start working together to compliment each other and create an authentic New Zealand story



SO: WE HAVE A STRONG LEVEL OF ALIGNMENT BETWEEN OPERATORS AND OUR DOMESTIC AUDIENCE WHEN IT COMES TO THE JOBS THAT NEED TO BE DONE FOR TOURISM

Chapter #5. What did New Zealanders want from us: their rulebook for future tourism

Rule #1: Aim for quality, not quantity

New Zealanders see an opportunity to rebuild the tourism economy while minimising its impact, by focussing on longer stays and increased spend over visitor numbers

WHY

Pre-COVID, tourism was starting to become a volume game, impacting visitors and locals alike. The focus on numbers by the more profit-driven operators meant high impact on our infrastructure as well as lower quality and lower authenticity in experiences for our visitors



ACTIONS

- Focus on high value visitors
- Introduction of a visitor tax (for international visitors)
- Reinforcement of safety standards for operators
- Supporting local operators to help keep money in New Zealand
- Continued investment in infrastructure to maintain quality of tourism

WHAT IT MEANS FOR OUR THREE KEY STAKEHOLDERS



VISITORS

More Authentic Experiences

Not just bums on buses! Slowing down and moving away from just the hot-spot checklist would allow visitors to experience the real New Zealand



OPERATORS

Fair Competition

Levelling the playing field for those operating within guidelines and striving to provide authentic experiences to visitors



LOCALS

Enriching their country

Seeing all visitors contribute towards our economy, reflected through better and growing infrastructure to cater to locals and visitors alike

Rule #2: Change the narrative around a typical New Zealand holiday experience

There is a need to change the dream of a New Zealand holiday from 'free' to an experience that is life-changing and special

WHY

New Zealand was increasingly being seen as a place where one can have a free holiday, often making visitors feel entitled. Freedom campers in particular were seeking to get as far as possible with as little as possible, sometimes encroaching on local amenities and driving down affinity and trust among locals



"We need to show them a different dream of a New Zealand holiday - about how it can be something they have never experienced before"

ACTIONS

Increasingly ability for visitors to interact with locals
Focusing our comms on the rich experiences a New Zealand holiday provides... with locals, through unique & high value F&B experiences, through immersive experience that leave visitors feeling part of our country and knowing our ways

WHAT IT MEANS FOR OUR THREE KEY STAKEHOLDERS



VISITORS

Immersive Experience

It creates a better experience that's more memorable and sharable once they get home. Sharing experiences, not just pictures



OPERATORS

More Opportunities

It changes the focus from passive to active experiences. From seeing to doing, from hearing to interacting



LOCALS

Meaningful connections

It increases genuine visitor interaction, builds trust and breaks down barriers. It changes the story we hear about visitors to a story told by visitors

Rule #3: Show them our ways

Cultural Education is seen as a crucial element in protecting our place and people, as well sharing our ways with the world... a need to continue promoting the Tiaki pledge

WHY

A perception that visitors lack awareness on the way 'we do things around here', a desire to see visitors take on board our way of life and respect for our country

Also a desire to share a true representation of Māori, a step away from performances and being a spectacle.

Sharing the understanding of Māori culture, the principles behind it and how they come to life today



"Our Maori culture is so unique, and visitors are very much intrigued by it. We need to show the same pride and talk about it more"

ACTIONS

Authentic Maori experiences
Seeing the Kaupapa first hand on Marae or through experiencing it through interaction
Building a unique food and beverage story and leverage native ingredients and Maori cooking methods
Creating a wider knowledge and the ability for all New Zealanders to feel confident in sharing our history with visitors

WHAT IT MEANS FOR OUR THREE KEY STAKEHOLDERS



VISITORS

Cultural growth

An experience unlike anywhere in the world. Leaving New Zealand having a new perspective and a view into our lives as New Zealanders



OPERATORS

Showcasing true New Zealand

Feeling confident that their experiences reflect the best of New Zealand. Partnerships with Iwi to give the opportunity to tell their story



LOCALS

Sharing their culture

Feeling that our culture and values have been given justice and taken on board by visitors. That they act in step with, not against, our ways

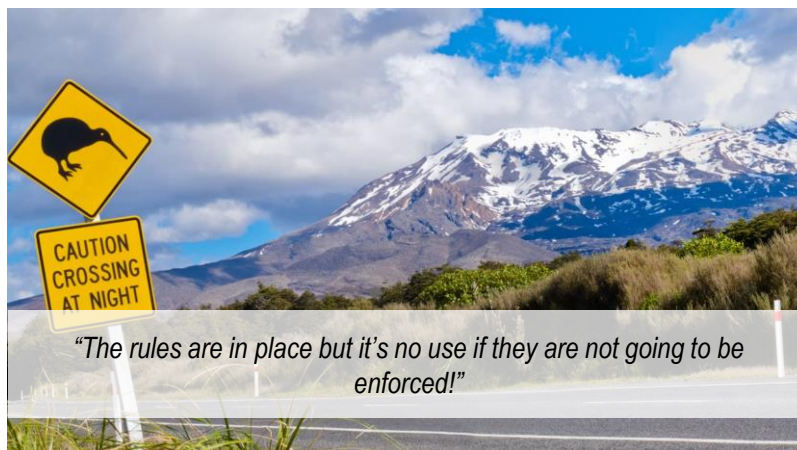
Rule #4: Walk the talk

New Zealanders are increasingly calling out for a stricter reinforcement of rules and regulations to minimise the impact from tourism

WHY

A consensus that we hadn't 'drawn a line' when it came to acceptable and unacceptable visitor behaviour

While it goes against our 'laid back' nature, a more rules and reinforcement based approach was seen as the best next step



ACTIONS

Standardisation of rules across councils
Educating incoming visitors on what's acceptable and what's not

Reinforcement of fines for breaches
Tourism dollars spent towards conservation
Continued focus on building infrastructure to support good behaviour

WHAT IT MEANS FOR OUR THREE KEY STAKEHOLDERS



VISITORS

A lesson they can take home

Knowing exactly what is expected of them and what the repercussions are of not complying



OPERATORS

A more informed customer base

Not needing to take messaging in their own hands about what is expected of their customers

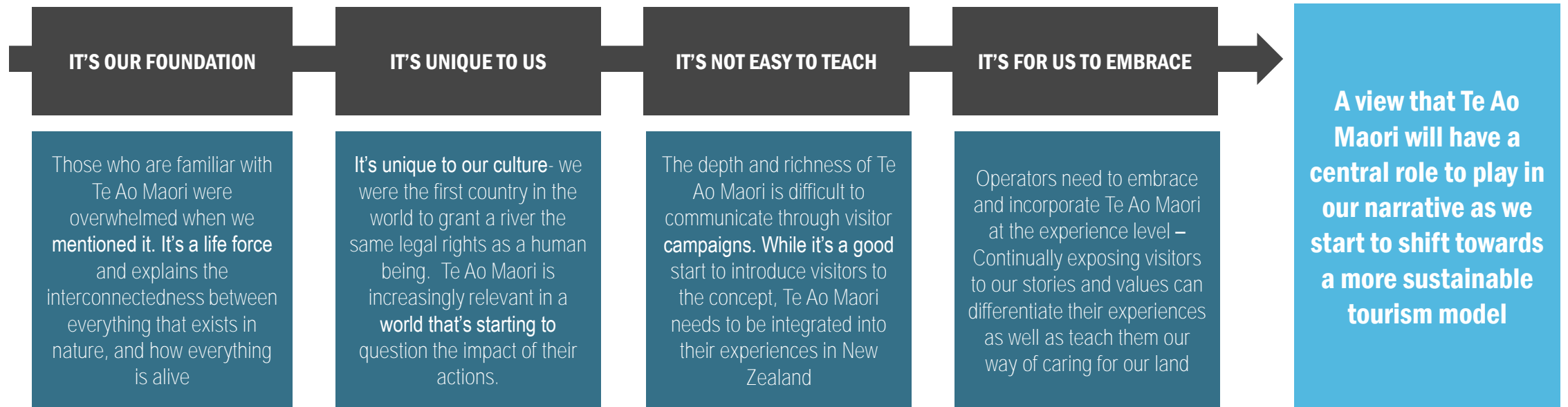


LOCALS

Leading the world

Reducing the impact on the environment and showing the world how its done, while also being able to protect the place they care about

A word on Te Ao Maori and its role in the future of New Zealand tourism



SO: Te Ao Maori can be our starting point for creating authentic experiences, but also makes us highly vulnerable if not done authentically through the lens of a visitor

“Te Ao Maori is fundamental to everything. It teaches science through stories. It personifies the physical elements- and suddenly people start thinking before abusing the environment. I have been blessed with this knowledge and I want to share it”



A young, light-colored lamb stands on a rocky outcrop in the foreground, looking towards the camera. Behind it is a large, calm blue lake that stretches across the middle ground. In the background, there are rolling green hills and a prominent, dark, forested mountain range under a bright sky. The overall scene is a scenic landscape, likely in New Zealand.

SO: OPERATORS AND NEW ZEALANDERS EQUALLY BELIEVE THAT NOW COULD BE A POWERFUL 'RESET' (THEIR WORDS, NOT OURS) OPPORTUNITY FOR OUR TOURISM INDUSTRY TO BE BETTER FOR THEM, THE VISITOR & OUR COUNTRY...

Chapter #6. REGIONS

Metro

WHAT'S HAPPENING TODAY?: Each of the towns we spoke with were looking to mean more than just a 'gateway' for visitors. A view that we haven't made the most of what our city spaces have to offer or differentiated them in the mind of visitors

THEIR UNIQUE CHALLENGES



Viewed as transition places
Being more than a stopover to the next nice view



Nothing to stand out
Little focus on parts of the city
experience that can't be had anywhere else



Moderate town vibrance
Need to dial up the buzz in the air, especially in CBD zones across all metros



Weather-dependent activities
A sense that the best of our cities is explored by bike or on foot, discouraged by any poor weather

PLAN FOR THE FUTURE

MEETING THE DOMESTIC NEEDS

Refresh	Play	Thrill	Knowledge
<p>The scenery is too similar for those looking to escape</p> <p>A lot to see and do as a group, but too hustle and bustle to create the introspective moments some are looking for. Also family friendly activities are few and far between, particularly in Wellington</p>	<p>A perception that cities have more to offer</p> <p>Wellington in particular has a lot to offer to the younger mindset through it's vibrant café culture and nightlife, but noted missing out on concerts. There is more we can for Auckland Christchurch to attract more than just a transitioning visitor</p>	<p>Not the first choice</p> <p>Cities have not been traditionally seen at par with other regions as places for sports or adventure activities. What can we offer within each city that does compete with what the regions have to offer?</p>	<p>Opportunity to find a unique story for each city</p> <p>Wellington- A story that heroes the unique Wellington culture Auckland- A story that talks to the incredible beaches and nature walks Christchurch- A story of the rebuild of a modern city on strong traditional foundations</p>

RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE

Rule #2: Change the narrative	Rule #3: Show them our ways	Rule #1: Quality, not quantity	Rule #4: Walk the talk
<p>Show how we are more than just a stop-over for regional visits</p> <p>Working with RTOs and operators to find and promote unique experiences and stories that's different to other numerous other cities around the globe</p>	<p>Demonstrate that cities and culture can go hand in hand</p> <p>Showcase the culture born from the unique history in each city, and create authentic experiences for visitors to see it firsthand</p>	<p>Build to maximize the value for visitors</p> <p>There is opportunity to dial up the quality of our offerings to keep visitors hooked for longer and encourage more spending</p>	<p>Take a lead on sustainable tourism</p> <p>Start planning for the future- think infrastructure for electric cars, a renewed focus on environmentally friendly tours etc.</p>

So: **Our cities suffer from the perception of 'same old'** – what they need is their own unique story (and supporting infrastructure) to be able to stand out from each other, and other cities around the world

Queenstown

WHAT'S HAPPENING TODAY?: A regional story that's on target, but a tourism model that is far too focused on the dollar, significantly impacting the social, cultural and environmental pillars. There was agreement between operators and locals alike that tourism in Queenstown was unsustainable and at a tipping point pre COVID19

THEIR UNIQUE CHALLENGES



Environmental impact
A growing sense of resentment towards tourists from seeing a lack of respect towards the land



Rising cost of living
A large number employed in the low-wage industry are unable to maintain a good standard of living



Overcrowding and driving
Congestion in peak seasons and dangerous driving from tourists not used to our roads



Unscrupulous operators
Blame placed on some operators for making profits at the cost of the community and environment

PLAN FOR THE FUTURE

MEETING THE DOMESTIC NEEDS

Refresh	Play	Thrill	Knowledge
<p>Currently linked with play and thrill</p> <p>The perception that Queenstown is an expensive holiday can be countered to an extent by promoting family/group things to do or places to visit that are less commercial or expensive</p>	<p>The go-to place for New Zealanders</p> <p>The vibrancy and breadth of activities have made this region a popular destination among younger groups. This works well for most part, but locals are keen on ensuring that any unruly behaviour is kept in check</p>	<p>Their pride and pain</p> <p>The landscape and tourism story have together made this region a globally sought after thrill destination. But locals are often priced out of enjoying their backyard activities that are catered around the international wallets</p>	<p>Cultural sharing and learning have taken a backseat</p> <p>The focus on adventure has resulted in a singular dimension to the visitor experience-so operators need to increasingly incorporate elements of cultural learning or history in their offerings</p>

RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE

Rule #4: Walk the talk	Rule #1: Quality, not quantity	Rule #3: Show them our ways	Rule #2: Change the narrative
<p>Stricter policing</p> <p>Seeing rules being enforced more proactively and any wrong-doing incurring the right fines- for instance ensuring freedom campers parked in unauthorized spaces are fined</p>	<p>Discouraging 'free' holiday makers</p> <p>Driving home the fact that renting campervans does not warrant a free holiday in other areas, and building the necessary infrastructure to support good behaviour</p>	<p>Education on our care for the land</p> <p>Showing visitors the right way of caring for the land- for instance telling them of our connection to our rivers to demonstrate why washing their clothes in it is unacceptable</p>	<p>A story that goes beyond adventure</p> <p>Dialing up the focus on local delights and stories to showcase the unique and personal experiences they can get in addition to adventure</p>

So: Locals and operators overwhelmingly agreed on the need to focus on our social and economic development as the much as the economic gains from tourism while also incorporating elements of our culture in our narrative

KEY: Working well Working OK Needs work

Rotorua

WHAT'S HAPPENING TODAY?: A region that has been synonymous with tourism in the North Island for decades, the people are feeling lonely without the vibrancy tourism brings to their town. However, over the years they have seen and felt less involvement with visitors to Rotorua, increasingly seeing the **'package'** visitors buy into missing the heart of the region

THEIR UNIQUE CHALLENGES



Town vibrance
The town can be seen as **'boring'** by visitors and locals alike



Bus operators
One of the bigger **'bus destinations'** in New Zealand, but increasingly the buses only stop in **a few places and that's it**



Transport & infrastructure
Having a car is critical to the visitor experience and there is little in the way of public transport available



Commercial
A view that the city is more international than local operators. **That the money doesn't always stay in Rotorua**

PLAN FOR THE FUTURE

MEETING THE DOMESTIC NEEDS

Refresh	Play	Thrill	Knowledge
<p>More for the mum than the family</p> <p>Spa & thermal activity do help tell a story here, but the 'rest/relaxation/pamper experience' only comes to life through a few operators</p>	<p>Pay to play</p> <p>A number of the experiences and activities are linked more to thrill than fun. Few 'non-commercial' options for those wanting to explore and meet others. Some community surrounding biking but needs to be a future focus</p>	<p>Historically focused on thrill</p> <p>Luging, white water rafting, mountain biking... Rotorua has traditionally lived off our adventure tourism positioning. A wide variety of options and operators</p>	<p>Currently more commercial than authentic</p> <p>Little is taught about some of the history of Rotorua, why it was chosen as the hub for Maori culture and the myths surrounding the thermal activity. For being such a cultural hub there is a big missed opportunity here</p>

RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE

Rule #4: Walk the talk	Rule #1: Quality, not quantity	Rule #2: Change the narrative	Rule #3: Show them our ways
<p>Build common connection</p> <p>Between the visitor and the local people. Giving visitors more opportunity to experience the town on their own terms... getting them off the bus and into town</p>	<p>Looking for those tourists who do come in and stay an extra night.</p> <p>Excitement took precedence when visitors had only a short stay, but a future focus to make these stops more than just the luge and Hell's Gate</p>	<p>There's more to Rotorua than the activities</p> <p>Showcase the slower (and cheaper!) parts of a Rotorua stay that are impactful..., walks around the blue lake, the story of the buried village</p>	<p>Bring out the Māori story without the performance</p> <p>Experiencing real Māori custom in a way that enriches and educates all visitors, rather than entertains</p>

So: There needs to be a balance moving forward between enhancing the activities Rotorua has built up, as well as the **untapped potential of its rich Māori history and story**

Tauranga

WHAT'S HAPPENING TODAY?: A consensus that the civic leadership and previous councils have failed to maximise the growth opportunities through tourism, leaving them vulnerable to the impact of peak season pressures without the benefits of well-rounded overall gains

THEIR UNIQUE CHALLENGES



Missing identity
Nothing distinctive to hook in transitioning or cruise visitors



Money channeled out
High percentage of cruise tourists, so money goes to international operators



Concentrated crowds:
Congestion during summer, especially at Mount Manganui, followed by dry periods/regions



Accommodation shortages
Limited hotels, resulting in high number of AirBNBs and rising rental costs

PLAN FOR THE FUTURE

MEETING THE DOMESTIC NEEDS

Refresh	Play	Thrill	Knowledge
<p>Leveraging the art and cultural talent of the region</p> <p>Locals are proud of their art scene and see the potential for promoting it more actively through art fairs, workshops and exhibitions</p>	<p>A call to revive the dying town culture and host more events</p> <p>Keeping shops, restaurants and pubs open for longer. Hosting live events, especially to boost shoulder season tourism. Hosting big occasion events, such as NYE, Christmas</p>	<p>Potential to go beyond surfing to become a Water Sports Hub</p> <p>Has a variety of water sports, but current focus is on promoting surfing There is opportunity to talk about glow warn kayaking, nature cruises and other sport activities</p>	<p>Little interest and awareness about Tauranga's history</p> <p>A sense that Tauranga has never shared what's unique to it There is opportunity to boost local pride and domestic experiences by incorporating the town's history into experiences</p>

RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE

Rule #2: Change the narrative	Rule #1: Quality, not quantity	Rule #3: Show them our ways	Rule #4: Walk the talk
<p>Showing them what we've got</p> <p>Moving away from our perception as a transitioning destination by sharing the story of the Tauranga arts and culture and promoting our water activities.</p>	<p>Going beyond cruise tourism</p> <p>Shifting the focus towards independent travellers over group tours, especially cruise tourists, to maximise economic gains for the region, and creating more accommodation options</p>	<p>Sharing our respect for the ocean</p> <p>Group and cruise tours limit local interaction and opportunities to share our culture. Consider ways of sharing our connection with the ocean through experiences</p>	<p>Prepping for peak season needs</p> <p>Ensuring we have the infrastructure and facilities like toilets and rubbish bins to cater to peak season crowds, and leading by example</p>

So: More than anything, there is a need to step out of the shadows of Neighboring regions by creating a unique identity for **Tauranga that's built on the culture and activities that the region has to offer**

KEY: Working well Working OK Needs work

Taupo & Ruapehu

WHAT'S HAPPENING TODAY?: An appreciation of what tourism has done for them, and a growing appreciation of Aucklanders and how much they bring to their area, which was noticed in the second lockdown

THEIR UNIQUE CHALLENGES



Short Stays

Visitors just popping in for an evening after the Tongariro crossing or just using Taupo for a base to ski from



Seasonality

Lacking a clear proposition outside ski season. Lacking a story around staying by the lake for summer and what they can do



Reasons to stay in town

A story defined by the natural spaces and places around them leaves the city with less opportunity to be dynamic

PLAN FOR THE FUTURE

MEETING THE DOMESTIC NEEDS

Refresh	Play	Thrill	Knowledge
<p>A focus on 'after ski', not a weeks break</p> <p>Strong in a 'post ski'/ post thrill wind down, with the likes of Wairakei and DeBretts. Lakeside camping and family fun focused areas add to this in some ways</p>	<p>More individual than social</p> <p>It's easier to plan small and individual itineraries than stag dos or family get aways. There is a lack of a central 'why', like wineries on Waiheke or breweries in Manawatu</p>	<p>Skiing, boating, skydiving... a good mix of thrill</p> <p>Catering well to the thrill crowd, especially the Mountain. Little improvement is needed</p>	<p>Little focus on history or storytelling</p> <p>Similar to Rotorua, a number of rich stories can be told about the area, without a focus</p>

RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE

Rule #1: Quality, not quantity	Rule #2: Change the narrative	Rule #3: Show them our ways	Rule #4: Walk the talk
<p>Easing congestion for locals</p> <p>While appreciative of the visitors, the ease of getting around town had made many locals realise what they were giving up day to day</p>	<p>Building connections between visitors and hosts</p> <p>Encouraging time spent in the main centre to cross paths with more than the typical spots. Keeping the town vibrant for everyone</p>	<p>Less focus on bums on seats</p> <p>For the likes of boat tours to the carvings, a sense that there was a missed opportunity in talking about more of the story behind them, the importance of the lake and what it means</p>	<p>Continued focus on hiking etiquette and safe driving</p> <p>Reducing visible impacts on the likes of the Tongariro crossing and on the Desert Rd</p>

So: A town that has thrived on Thrill, but needs to dial up fun for the entire family to extend trips past a weekend

Invercargill & Hokitika

WHAT'S HAPPENING TODAY?: These regions have not seen the costs of tourism as much as others, but are also lagging in gains. There is greater acceptance towards visitors, and they are seeking to grow tourism while being mindful of not repeating the mistakes of other regions in doing so

THEIR UNIQUE CHALLENGES



Dangerous driving
Their roads are trickier to drive on making this one of the biggest concerns of tourism



Limited local interaction
A large percentage of campervans and group tours restricts local interaction and spend



Freedom camping woes
Although lower in tourist numbers, these regions are seeing issues like littering and toileting grow



Not destinations in their own right
Not traditionally promoted, but seeing this gradually improve

PLAN FOR THE FUTURE

MEETING THE DOMESTIC NEEDS

Refresh	Play	Thrill	Knowledge
<p>Pride in the offerings, but needs more promotion</p> <p>Extensive cycleways, birdlife and conservation, and a food culture they are proud of! But also a sense that there is more we can do to make more New Zealanders aware of what they have to offer</p>	<p>Not currently catered to this need, and some resistance towards it</p> <p>Locals believe their story is rooted in their history place and people, and not many were keen on promoting or developing it as what they described as a 'party place'.</p>	<p>Potential to dial up the less conventional thrill offerings</p> <p>Not traditionally been promoted as 'thrill destinations' but activities like treetop walks, mountain biking, fishing trips and horse riding can be their answer for thrill seekers</p>	<p>Surface level understanding among New Zealanders</p> <p>They have a rich Maori heritage, an interesting gold mining history and some fantastic museums- everything New Zealanders know exists, but have limited knowledge of- and there is opportunity to dial it up</p>

RULES FOR INTERNATIONAL TOURISM IN ORDER OF IMPORTANCE

Rule #1: Quality, not quantity	Rule #4: Walk the talk	Rule #3: Show them our ways	Rule #2: Change the narrative
<p>Encourage local spending</p> <p>Build the number and quality of the activities we have to offer to encourage visitors (particularly independent travellers) to stay longer and spend more</p>	<p>Preparing for growing numbers</p> <p>Not going the 'Queenstown way' by ensuring the right rules and infrastructure are in place to manage growing numbers, and that we are enforcing rules right from the start</p>	<p>Showcase our culture through our care for the place</p> <p>Connection and responsibility towards the land is an intrinsic part of the culture of these regions and there is an eagerness to share this with the world</p>	<p>Communicate in the voice of locals</p> <p>Families who have been involved with the evolution of these regions since generations can add a unique and personal touch to visitor experiences- how can we involve them in telling our story better?</p>

So: There is appetite for tourism growth in these regions, but with a cautious mindset. Tackling challenges early and systematically while investing in tourism infrastructure is how many defined the way towards success

Chapter #7. What's next? Crafting a United Story

From this piece of work, we have seen that New Zealanders will have different expectations of the Tourism industry when borders reopen, and it will take a nation-wide and industry-wide collaborative approach to do this right.

In the meantime, we also have a job to do to build the value back into domestic tourism to ensure that New Zealanders feel just as comfortable spending in the same way as they would if they had travelled internationally

To do this, we see the need for three different focus areas

1.

Enable New Zealanders to tell a better story to ourselves and our visitors

2.

Create an industry-wide focus on delivering to this vision... an industry that enriches everyone who experiences it

3.

Collaborate with operators to bring that story to life in a unique way for their area

1. Enable New Zealanders to tell a better story to ourselves and our visitors'

Because on so many levels, what we have is not dissimilar to anywhere else in the world. We have an English speaking country, with diversity and beautiful **landscapes. We don't** have to think hard for other countries that offer the same

But travel restrictions have given New Zealanders an appreciation of exactly how much richness and depth we have within our own borders

A realisation that we may not have been doing this justice for the visitors we were welcoming when borders were open

Which has created the desire to frame up the visitor experience in a different way, underpinned by authentic experiences with New Zealanders and our culture at the **heart of it...**

A desire to create and encourage every New Zealander **to be part of our visitors' experience...**

Creating a nation of 5 million story tellers

2. Create an industry-wide focus on delivering to this vision... an industry that enriches everyone who experiences it

ECONOMIC ENRICHING NEW ZEALAND

Retargeting a higher value international visitor, who stays longer and spends more, and continuing to invest in infrastructure that can benefit locals and visitors alike

THINK

Building roads: Safe roads for better regional connectivity

More public facilities: Increased investment in public toilets, rubbish bins

SOCIAL MEANINGFUL CONNECTIONS

Building experiences that create connection to us as a land and a people... not just a destination that has natural beauty that can be seen for free

THINK

Create immersive experiences ‘: Work with RTOs to deliver authentic regional experiences

Help to rebuild trust: Focus on employment numbers, housing etc. to help locals see tourism in a positive light

CULTURAL SHOW THEM OUR WAYS

Sharing the wealth of culture we have in this country only builds on our value story and helps both visitors and hosts see more of the unique side of New Zealand

THINK

Cultural Education‘: For instance visitor campaigns, culture focussed comms etc.

Training Operators: Equip them to embrace and incorporate Maori culture in their offerings

ENVIRONMENTAL LEAD THE WORLD

We need to show that the industry is doing something to reduce the impact we have had in the past. An opportunity to be world leaders in low impact travel

THINK

Consistent policies: Standardised visitor rules and strict enforcement.

Conservation efforts: Tourism money spent on maintaining tracks, parks and sustainable technology

**WHICH MEANS...
ANY VISITOR WHO COMES TO NEW ZEALAND EXPERIENCES US AND OUR
COUNTRY IN A UNIQUE AND PERSONAL WAY**

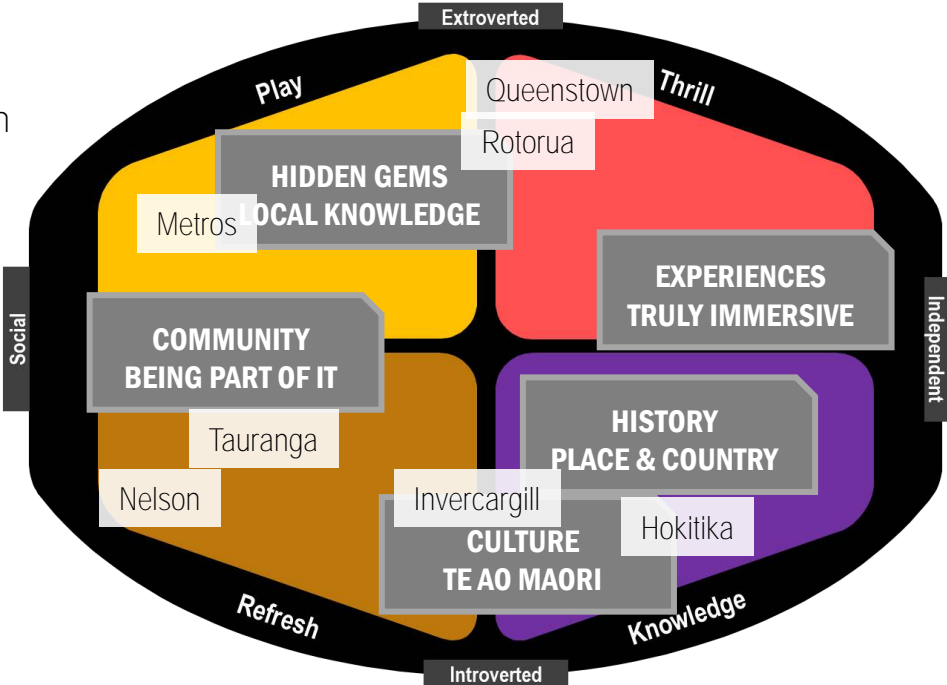
3. Collaborate with operators to bring that story to life in a unique way for their area

Starting with finding a purpose for each region that compliments rather than competes with those around them, that helps New Zealanders turn trips into journeys

Help our regions find their story and their **voice that's built around the activities that naturally reside within it**

Building out stories for our regions that compliment not compete with that region next **to them... that allow the domestic audience to imagine a week long journey and not a weekend away**

Supported by a range of activities that cover the breadth of travel needs within New Zealand



- Create a shift from individual operators to connected industry that is working together to cross sell and find benefits for all
- That provide curated experience and packages to grow the value in exploring your backyard
- That allow us to believe that whatever we want to do, we can do it here

That when New Zealanders believe their country has not just wonderful things to see & do but places to learn about and explore, it creates a win-win for our people and our place, and all those who come here



Action & relax-tion

History & culture combined

The Land of a thousand beaches

Experience the tikanga first hand

Looking at this together... we have been given a unique opportunity to reimagine tourism holistically, in a way that balances the unique social, economic, cultural and environmental elements of New Zealand



The Next Chapter- Finding a story that unites our ambition for New Zealand with what aligns with the new desires of International visitors

Our 4 starting points...

HOME OF A UNIQUE CULTURE



New Zealand's cultural context is what makes us truly unique

There is an incredible depth to the stories, **myths and way of life the Māori culture brings to New Zealand. It's a gift we can share with the world**

From the notion of all things being connected, through to our role as guardians of the land- these teachings about the way we need to live in connection with the earth have never been more relevant

OUR GREEN STORY



A place that is pure, magical and wonderful

And a people who care to keep it that way. From our dedication to conservation, to our smarts in renewable energy, New Zealand is a country at the forefront of sustainability

We aspire to lead the world in light touch tourism that creates meaningful experiences without costing the earth

LIVING LIKE A LOCAL



New Zealand's regions are rich in vibrant and unique experiences, every one different from the next

The best part is, it's not a show. Get an authentic New Zealand experience and blend in with the locals off the beaten track

Experience the real New Zealand through our people and take a new view on life home with you

THE BIRTHPLACE OF ADVENTURE



There is a reason that New Zealand is the adventure capital of the world

From being the first country to invent the bungee jump, through to some of the highest sky dives and most dangerous mountain bike trails

Get your fill of thrill on a trip to New Zealand, **an experience you'll never forget**



This has been a One Picture presentation

One Picture.