

CENTRAL OTAGO PERSONA REFRESH

October 2021

SUMMARY

This research was undertaken to update the team's understanding of the target market personas first developed for Tourism Central Otago in 2018 (see Appendix for details). It follows a period of significant travel disruption caused by the Covid-19 pandemic and provides new insights on the travel planning behaviour, expectations and travel intentions of Central Otago's key domestic and Australian travel consumers.

With work on Central Otago's destination management plan underway, the research also provides an important 'consumer' perspective on the tourism futures that are being canvassed with communities, tourism operators and other stakeholders in Central Otago. In general, results to date highlight very strong alignment in the aspirations and views of Central Otago across the various stakeholder groups.

Changes in Travel Attitudes and Behaviour (Past 3-4 Years)

- Staying an extra few days at a destination to work remotely is becoming more common.
- There seems to be an increase in the influence of social media images (esp. Instagram) at the early inspiration/dreaming stage of travel.
- Visitors, especially those with higher levels of disposable income, appear to be more conscious and selective about where they are spending their money and are more likely to support local businesses and those that are vocal about their sustainability initiatives.
- With international travel currently off the cards, New Zealanders' desire to travel domestically has increased. At the time of interviewing, confidence was high and there was very little concern about Covid-19 in terms of domestic travel. There is no evidence to suggest that the pandemic has had any impact on Central Otago's positioning.

Top-of-Mind Perceptions of Central Otago

The first things that come to mind when Central Otago is mentioned are wine, the landscape/scenery (wide open spaces), the dry/hot climate and seasons, the outdoors, cycling (Otago Rail Trail), and local fruit.

SUMMARY — FUTURE THINKINGS CONCEPTS

GOOD FIT FOR CENTRAL OTAGO (AND CURRENT POINT-OF-DIFFERENCE)

- An uncrowded place with wide open spaces
- A place with essential character (small town, un-developed)
- A place that celebrates the seasons
- A place where you can relax and unwind
- A place set-up with cycling trails between towns (encouraging active transport)
- A place that celebrates the stories (culture/heritage) of the region
- A place that has interesting boutique experiences
- A place that celebrates locally grown/made food, wine and beverages
- A community that welcomes you with open arms (active vs passive hosts)

GOOD FIT FOR CENTRAL OTAGO (CURRENT OR POTENTIAL)

- A place where you could spend a weekend learning something new (e.g. studying brewing)
- A place where you can stay longer and work remotely
- A place that celebrates everything local
- A place that celebrates arts and creativity
- A place that is all about events (a diverse mix of events)
- A place where you can connect with nature (e.g. spectacular night skies)
- A place that offers opportunity for backcountry experiences / escapes
- A place that's within close proximity (or easy access) of an airport

POOR FIT FOR CENTRAL OTAGO

- A place where visitors can stay in recreate in purpose-built villages
- A carbon neutral, fully renewable (electric) destination
- A place where public transport is easily accessible on demand
- A place where history is brought to life using the latest technology (e.g. holograms)

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BACKGROUND, OBJECTIVES & RESEARCH APPROACH

This research was designed to 'refresh' understanding of the target market personas first developed for Tourism Central Otago in early 2018.

The specific objectives of this research were to provide insights informing: -

1. How COVID-19 (and the associated societal changes and their impacts on tourism activity) have affected the personas' appetite for travel, travel-related needs and aspirations, destination decision-making criteria and travel behaviour (at all stages of the customer journey, including pre- and post-travel).
2. How Central Otago is positioned in the post-COVID environment and where new challenges and opportunities may exist – both in the short- and longer-term.

Finally, we tested some of the 'futures thinking' emerging from the destination management planning process, both to assess the appeal of these concepts and how the range of directions suggested might influence the personas' views on Central Otago and their ongoing engagement with the region.

Qualitative Research

New Zealand Travellers

15 x interviews with NZers who had either visited Central Otago in past 2 years or know a lot about the region

Interviewing in Auckland (via Zoom), Christchurch and Wellington between 8 September – 4 October 2021


Within each region, 1 x interview with each persona (recruited using the same qualifying criteria as in 2018)

Australian Travellers

5 x interviews (via Zoom) with Australians who had visited Central Otago

Interviewing between 8 September – 4 October 2021

1 x interview with each persona (recruited using the same qualifying criteria as in 2018)



**CHANGES IN TRAVEL
ATTITUDES & BEHAVIOUR
(PAST 3-4 YEARS)**

CHANGES IN TRAVEL ATTITUDES & BEHAVIOURS (PAST 3 – 4 YEARS)

Changes in travel behaviour are primarily driven by visitors moving in and out of lifestages (e.g. kids leaving home so more time and disposable income for travel, moving in with partner so now booking motels, rather than sleeping in the back of a van).

A few observations:

- To find information about a destination, visitors tend to start with a simple Google search ("What to do in XYZ?") and this will lead to destination websites, TripAdvisor lists, travel blogs. By looking at a few different types of websites visitors get an understanding of what the top activities or experiences are. Travel blogs are a key source of information for those looking for more niche activities/experiences, rather than the top 10 must-do's (this is particularly relevant for the Explore & Discover and Prestige & Status personas).
- There does seem to be an increase in the influence of social media images (especially Instagram) at the early inspiration/dreaming stage of travel. This is consistent across personas - visitors are inspired by travel photos (posted by friends or others followed or as targeted advertising). Some then follow destination hashtags when planning a trip and looking for further ideas.
- Working remotely is becoming more common. Visitors are starting to consider staying an extra couple of days at a destination and working remotely.
- Visitors, especially those with higher levels of disposable income, do appear to be more conscious and selective about where they are spending their money and are more likely to support local businesses and those that are vocal about their sustainability initiatives.

COVID-19 IMPACT ON TRAVEL ATTITUDES & BEHAVIOURS

- With international travel off the cards, New Zealanders' desire to travel domestically has increased. At the time of interviewing, confidence was high and there was very little concern about COVID in terms of domestic travel.
- New Zealanders anticipate that they will continue to travel domestically once borders open, but most wanted to wait and see what happens before travelling internationally themselves. The biggest concern for international travel once available, is getting stuck with border closures (note: Australians have similar concerns for domestic travel and are reluctant to travel out of state due to the risk of state borders closing).
- Financial protection (i.e. ability to cancel bookings last-minute and/or insurance that includes COVID cover) would increase confidence to plan and book travel. Visitors want to retain personal interactions when travelling and, for the most part, would prefer not to shift to a contactless check-in experience.



It does not appear that perceptions of Central Otago have changed at all in this post-COVID environment.

All participants spoke very favourably about Central Otago and all were looking forward to returning, but there is no evidence to suggest that COVID has had any impact on Central Otago's positioning.



CENTRAL OTAGO

CENTRAL OTAGO PERCEPTIONS



Top-of-mind Associations:

The first things that come to mind when Central Otago is mentioned are wine, the landscape/scenery (wide open spaces), the dry/hot climate and seasons, the outdoors, cycling (Otago Rail Trail), and local fruit.



Activities/Experiences Associated with Central Otago:

The main activities/experiences associated with Central Otago are cycling, wineries, unique Winter activities (curling / ice skating), and walking / hiking (exploring).



Central Otago History/Culture:

When asked about the history of Central Otago the first thing mentioned is the Gold Rush (in particular, Chinese gold miners). Other historic events include the building of the Clyde Dam and flooding of Lake Dunstan. None of the 20 visitors interviewed had any awareness of any Māori history in Central Otago.



Central Otago Conservation:

Visitors had mixed thoughts on whether they would associate Central Otago with conservation – some agreed (due to beauty of natural environment and limited development in the region) and others disagreed (due to the issues relating to farming and rabbit control).



Central Otago Visitors:

Central Otago is seen to attract a broad range of New Zealanders and international visitors. The region caters for high spending travellers (looking to visit wineries, play golf etc) and families with a more modest budget wanting to enjoy the natural environment. Central Otago offers opportunities to escape, relax and enjoy a slower pace. Young people looking for urban excitement (nightlife) or adrenaline activities may be less interested in visiting the region.



**FUTURE THINKING
CONCEPTS**

FUTURE THINKING CONCEPTS – GOOD FIT FOR CENTRAL OTAGO

Future Thinking Concept	Comments
An uncrowded place with wide open spaces – vs. urban environment	Very strong fit and key point of difference for Central Otago
A place where you can relax and unwind – vs. do new things every day	Very strong fit – visitors like that they can do an activity in the morning and then relax in the afternoon, with good wine and food
A place with essential character (small town, un-developed)	Very strong fit and key point of difference for Central Otago
A place that celebrates the seasons	Very strong fit and key point of difference for Central Otago
A place set-up with cycling trails between towns (encouraging active transport)	Very strong fit (Rail Trail)
A community that welcomes you with open arms (active vs passive hosts)	Considered a good fit by most – southern hospitality (a couple of visitors had less positive experiences)
A place that celebrates the stories (culture/heritage) of the region	Good fit (example - gold mining history, early settler stone huts)
A place that celebrates locally grown/made food, wine and beverages	Very strong fit (local wines and seasonal fruit)
A place that has interesting boutique experiences - vs. large built mass attractions	Good fit (example – visiting small, boutique wineries)

FUTURE THINKING CONCEPTS – GOOD FIT FOR CENTRAL OTAGO (CONT.)

Future Thinking Concept	Comments
A place where you could spend a weekend learning something new (e.g. studying brewing)	Appealing concept - would be a good fit if options were available
A place where you can stay longer and work remotely	Increasingly relevant - would be a good fit if connectivity allows
A place that celebrates everything local	Good fit and important for New Zealanders, especially in post-COVID environment, wanting to support small businesses.
A place that celebrates arts and creativity	Good fit - mentions of specific artists (e.g. Graeme Sydney) and wool shop in Clyde
A place that is all about events (a diverse mix of events)	Good fit for some types of events although visitors wouldn't want to see large-scale, fast-paced festivals held in Central Otago
A place where you can connect with nature (e.g. spectacular night skies)	Good fit as Central Otago is not over-developed (although Tekapo currently 'owns' night skies)
A place that offers opportunity for backcountry experiences / escapes	Good fit - many opportunities for backcountry experiences in the region
A place that's within close proximity (or easy access) of an airport	Distance from Queenstown (or Dunedin) airport to Central Otago is not a barrier - scenic drive, part of the experience

FUTURE THINKING CONCEPTS — POOR FIT FOR CENTRAL OTAGO

Future Thinking Concept	Comments
A place where visitors stay and recreate in purpose-built villages	Mixed views, but more opposed than in favour. Some felt that Central Otago has the space and a nice climate so would be a good fit, others were very strongly opposed and felt that the point of going to Central Otago was to get out and explore the region not stay in one place.
A carbon neutral, fully renewable (electric) destination	Seen as important and 'the way of the future' so strong support for destinations prioritising this, but for Central Otago specifically there was some scepticism around fit. Some questioned whether an EV would handle the long distances between towns, others felt that the locals ('middle-class farmers') wouldn't be supportive.
A place where public transport is easily accessible on demand	Central Otago region considered too sparse for public transport to work. All visitors would be self-driving when visiting Central Otago so didn't feel that they would have any need for public transport anyway.
A place where history is brought to life using the latest technology (e.g. holograms)	Celebrating history is important and all appreciated and were interested in Central Otago's history, but using the latest technology (e.g. holograms) to bring it to life is not seen as a good fit with Central Otago's character (small towns, undeveloped). <i>"I think we can leave that to Te Papa"</i>



“ I don't think that's a good fit for Central. Queenstown can do that but I don't think Central should do that. It's the unsophistication of Central, the hands-on experiences, the walking, the hiking, the creativity... I think that's what your holiday in Central should be, not going and staying at some exclusive resort in the corner where everything is there. Here [Central Otago] you're trying to encourage people to get out and do stuff, whereas here [Tourism Hub] you're saying 'well don't bother, we've got it all on our doorstep'. You could build that in Auckland. Why bother going to Central?

FUTURE THINKING CONCEPTS – UNSURE ABOUT FIT/MIXED OPINIONS

Future Thinking Concept	Comments
A place that's made for New Zealanders (predominantly NZers with limited international visitors)	Central Otago is seen to attract both New Zealanders and international visitors equally
A place where the workforce is made up of highly skilled locals with local knowledge	Desirable concept, but some felt that Central Otago would realistically need to recruit some workers from outside the region
A place that offers a subscription/pass to provide community membership/temporary resident status. i.e. includes accommodation/transport/activities and members-only benefits.	Mixed views - most were interested in the concept, but questioned whether there is enough to offer in Central Otago to create a package of value (note: adding community gym membership would be appealing)
A place that is all about health and wellness	Mixed views - hiking/cycling in nature is a good fit for health and wellness, but visitors don't want to see an influx of day spas
A place that cares for the natural environment	Mixed views - stunning natural environment (un-developed), but farming and rabbit control issues mentioned

FUTURE THINKING CONCEPTS – UNSURE ABOUT FIT/MIXED OPINIONS (CONT.)

Future Thinking Concept	Comments
A place set-up as a cycling hub (i.e. multiple cycling experiences from one place)	Other than one avid mountain biker, most currently associate Central Otago with cycling (Rail Trail) but not mountain biking
A place with a clear sense of identity (knows who it is and what it stands for)	Mixed views - some felt Central Otago already has a strong sense of identity (essential character), while others struggled to articulate what Central Otago stands for
A place that's always connected	Mixed views about whether being connected is a good fit with Central Otago currently and whether it should be in the future - visitors like being connected when they need to be, but also like 'disconnecting' and see Central Otago as a place for getting away
A digitally enabled destination	Mixed views - similar to above (would be good as long as the digital side of it wasn't too obtrusive)
A place that offers short-hop electric flights at a low cost to anywhere in the region	Exciting concept, but to some extent takes away from the idea of exploring the region - driving between towns

WHAT DIFFERENTIATES CENTRAL OTAGO FROM OTHER REGIONS?

1



An uncrowded place with wide open spaces
(rather than an urban environment)

2



A place with essential character
(i.e. small town, un-developed)

3



A place that celebrates the seasons



There are two things that differentiate Central Otago from other regions. One is the character – the gold mining history, the stone huts, the train that follows the old rail route... I think that's important. But I also think it's the wide open spaces, that's really important. You get into the Maniototo and the sky is enormous, it's like Montana. It's vast. You've got history and you've got wide open spaces, and these other things all slot into that.

WHAT DIFFERENTIATES CENTRAL OTAGO FROM OTHER REGIONS? (CONT.)



A place where you can relax and unwind
(rather than doing new things every day)



A place set-up to encourage active transport
(e.g. cycling as a means of travel between areas)



A place that celebrates the stories
(culture/heritage) of the region



A place that has interesting boutique experiences
(rather than large built mass attractions)



A place that celebrates locally grown/made
food, wine and beverages



A community that welcomes you with open arms
(i.e. active hosts rather than passive)





**APPENDIX
(2018 PERSONAS)**

OVERVIEW

When not busy working, Angela prioritises finding time to relax and unwind. Getting away for a holiday or short break gives her a chance to escape from the routine and pressures of her busy everyday life to recharge and return home feeling refreshed.

LIFESTYLE

Angela is in her late 30's and lives in the city with her partner. She leads a busy life managing her own business, with several employees reporting to her, and often works 50-hour weeks with only one day off work in the weekends.

Angela has become more focused on her own health and wellbeing over the past few years and has made it a priority to take more time out for herself. While Angela enjoys her job, she has been looking for ways to reduce her working hours and stress levels, looking to find a better 'work-life balance'.

In her limited down-time, she tries to keep her calendar clear so she can relax at home – knitting, baking and watching movies. Her ideal Sunday starts slowly with a cup of coffee and a read through the newspaper in the sun, followed by a leisurely walk and an afternoon spent catching up with friends.

TRAVEL

Angela does not get away for holidays or short breaks as often as she would like to – her annual 'long' holiday takes considerable planning with regards to managing business operations. When she does have the opportunity to get away she prefers to leave the city to visit quieter, more sparsely populated, destinations and detach from the everyday to relax and unwind with 'no agenda'.

She sometimes travels with friends or alone to visit and stay with other friends but does prefer to travel with her partner. She searches for accommodation, generally motels, online but will on occasions call operators. Angela prefers more casual dining when on holiday – such as an outdoor café, rather than a fine dining restaurant.

"We might stay in a city for a day but for me it's about nature... we've got enough people around us normally... out in nature you really have your own little world"



ANGELA

ESCAPE & RELAX

TRAVEL DRIVERS

- Detach from everyday stress and pressure to unwind in a new environment
- Take time out to relax alone or spend quality time with partner
- Recharge – getting away is part of a good work/life balance
- Connect with the outdoors/nature

MEDIA/TRAVEL PLANNING

- Friends/family are highly influential
- Social media (Instagram & Facebook) inspire holiday ideas
- Stay in touch with friends through Facebook Messenger and txt/calling
- Enjoy movies (both home & cinema)
- Holidays are planned and booked well in advance – through internet search and direct bookings with operators
- Limited media exposure when travelling - try to detach when away

OPPORTUNITIES FOR CENTRAL OTAGO

- Nature-based experiences
- Promote the small town experience - to get away from the 'hustle and bustle'

MARKETING PROPOSITION

- 'Time to relax and re-charge'

OVERVIEW

Spending quality time with her husband, family and friends is a priority for Helen. She enjoys getting away with groups of friends, with her older children or just with her husband, and participating in activities that they can all do and enjoy together.

LIFESTYLE

Helen is in her early 60s, lives with her husband Mike and works part-time in an administrative role. She has older children who have left home to work in different cities. Her eldest daughter lives in the UK with her 8-month old grandson. They keep in touch regularly through Facebook Messenger and phone calls through WhatsApp.

Helen has become fairly active recently and enjoys hiking and biking in the weekends. She finds time to try new things and is now starting golf lessons after some encouragement from her husband. Helen is keen to make the most of her physical health, spending as much quality time as possible with her husband, family and friends, doing the activities they love while their health still allows it.

TRAVEL

Helen and Mike enjoy getting away. They drive rather than fly, sometimes visiting friends/family, other times to enjoy a weekend cycling together and on occasions taking the campervan. Often travel will be through the scenic route, stopping at small towns for a coffee or to check out a local craft market or museum. Once or twice a year Helen travels with a group of friends, and often this trip revolves around an activity like hiking/biking. Last year they cycled the West Coast trail after seeing a travel package deal online.

When planning international holidays or to unfamiliar destinations, Helen prefers to use a travel agent. She is happy to pay a little extra to have “peace of mind” and not go through the hassle of online research, leaving it to the experts. She chooses down-to-earth coffee shops/cafes with friendly local service to eat at (or enjoys picnic food), rather than fine dining restaurants.

“I did the Otago Rail Trail with friends three years ago. One dinner out with all of us and we said ‘we can all ride bikes, let's go!’. Many months of planning because of people's holidays and things like that, but that's a memory you never forget. It was just great!”



HELEN

BONDING

TRAVEL DRIVERS

- Spend quality time with family and friends
- Bond over challenging but safe activities that everyone can enjoy – collective achievement
- Make the most of life, by taking advantage of opportunities to participate in new experiences

MEDIA/TRAVEL PLANNING

- Friends/family are highly influential
- Group chats on WhatsApp, Viber & Facebook Messenger
- Close group of friends & family on Facebook – often post updates while travelling
- Browse for deals on daily deal sites such as GrabOne, Groupon, TreatMe

OPPORTUNITIES FOR CENTRAL OTAGO

- Development of activities that offer broad appeal and can be done by people of all ages and ability e.g. river/lake cruise
- May be element of nostalgia/family tradition in choosing Central Otago

MARKETING PROPOSITION

- ‘Spend quality time with family and friends’

OVERVIEW

Ryan enjoys travelling to unique destinations, exploring and discovering different places and unfamiliar experiences. He appreciates authenticity and seeks a genuine experience. He enjoys coming back from his travels with new knowledge or skills.

LIFESTYLE

Ryan is in his mid-30's, single, and working in the tourism industry. He lives a full and active life - enjoying mountain biking, hiking, and snowboarding in his evenings and weekends. He would often go out for drives with no agenda, keeping an eye out for things of interest to him.

Having a good time with his friends, keeping fit, and saving/reducing debt are important to Ryan. After finishing university he spent several years travelling overseas 'chasing the snow', returning home just over a year ago. He enjoys learning new skills and has recently completed his commercial boating license and scuba diving ticket. Ryan is also interested in improving his photography skills.

TRAVEL

Ryan enjoys getting away for active weekends and short breaks – these usually revolve around mountain biking or hiking, rather than organised activities. He doesn't tend to take longer trips due to work commitments. He travels with friends, although is equally happy travelling alone. Trips are fairly spontaneous and any bookings are made at the last minute.

Ryan is drawn to destinations that are different and off-the-beaten track. He prefers remote natural environments, rather than ones that have been 'tracked out' by visitors before him. He doesn't mind having to 'work' for an experience or to fully appreciate the environment – e.g. getting up at 3am to hike up a mountain to catch the sunrise. Ryan is conscious of costs while travelling and often sleeps in the back of a van or ute to save money on accommodation. When booking commercial accommodation, Ryan looks for somewhere basic and affordable - a bed, shower and somewhere to make a cup of tea.

“That feeling that you've gone somewhere where potentially only a handful of other people have been is a massive drawcard for someone like me”



RYAN

EXPLORE & DISCOVER

TRAVEL DRIVERS

- Discover unique destinations and new experiences
- Connect with local people for an authentic experience
- Connect with nature/outdoors
- Spontaneity/flexibility ('go with the flow')

MEDIA/TRAVEL PLANNING

- Moderate/high internet usage – often browsing on Facebook and online
- Information available at the destination or en-route (e.g. brochures from i-SITEs) is important - often short lead-in times
- Word of mouth (through other visitors, locals and operators) prior to travel as well as while travelling is influential - enjoy talking and listening to others about experiences

OPPORTUNITIES FOR CENTRAL OTAGO

- Highlight unique offerings (e.g. curling, ice luge)
- Emphasise history and old townships - possibly a touring route

MARKETING PROPOSITION

- 'Discover unique Central Otago'



MONICA

PRESTIGE & STATUS

OVERVIEW

Monica is an affluent traveller, looking to visit the more unique places that people talk about and to treat herself by participating in exclusive experiences that not everyone gets to enjoy while travelling.

LIFESTYLE

Monica is in her mid 50's and lives close to the city with her husband David and two children. She works as a national sales manager for a large organisation, a role requiring frequent travel around the country. Monica enjoys her job and is well compensated - providing her with the means to indulge and enjoy herself.

Monica enjoys a Friday evening glass of wine and meal out with her husband at a local restaurant. Weekends are a time to unwind – walking/jogging, going to the gym, watching the kids play sports, entertaining friends and dining out. Monica volunteers her time to work with troubled youth as a way of giving back to the community.

TRAVEL

While Monica loves her metropolitan lifestyle, frequent weekend getaways allow her to escape the hustle and bustle of the city to switch off and relax. Monica and David like to get away every other weekend, sometimes travelling with other couples, but for the most part just the two of them. They leave after work on a Friday and return again on the Sunday evening - short getaways are easier to fit into their busy calendars than longer breaks and require minimal planning.

While Monica and David do have a few favourite destinations that they return to, more unique experiences (e.g. a luxury farmstay with a guided 4wd tour) also appeal to Monica. Travel plans and hotels are booked online 2-3 weeks in advance. Monica likes to indulge and treat herself on these weekends and while they don't tend to have an agenda, unless attending a concert or rugby test match, they do seek out experiences in quieter restaurants or wineries. Monica and David enjoy the social element of travelling, taking the opportunity to interact with locals and other guests.

“What we love is places like Oliver's, you have these beautiful stone walls and these quaint little houses... you tend to find when you come to little places like this the people are a lot more friendly... people aren't run off their feet”

TRAVEL DRIVERS

- Indulge in a bit of luxury and comfort
- Interact with other guests and locals
- Discover unique and authentic experiences

MEDIA/TRAVEL PLANNING

- Social media - post updates on Facebook to stay connected with friends & family
- Frequent catch ups with friends in person or by phone (major influencer in deciding where to travel)
- Regular smart phone and laptop users - pop up news feeds
- Enjoy reading books (and magazines/newspapers)
- Enjoy going to the movies or theatre
- Book travel in advance and will often use travel agents – convenience and confidence (that they have knowledge of the area)

OPPORTUNITIES FOR CENTRAL OTAGO

- Wine tourism
- Events - Food & wine festivals
- Luxury stay experiences
- Immerse in local experiences
- Build personal relationships – to influence future travel

MARKETING PROPOSITION

- ‘Indulge yourself’



NICK

PERSONAL CHALLENGE & ACHIEVEMENT

OVERVIEW

For Nick, holidays are a chance to get outside, get active and make the most of the natural environment. He enjoys pushing his personal limits and challenging himself through physical activity.

LIFESTYLE

Nick is in his early 60s and lives with his wife. He is now semi-retired, offering him the work/life balance he wants, with flexibility to change his schedule or take time off to get away. It's not a stressful role and doesn't consume him, so Nick goes into the weekends feeling rested and ready to get out and about. Nick leads a social and active life and enjoys being in the outdoors - cycling, fishing or skiing. Keeping himself physically active and healthy is a priority for him.

Nick enjoys off-road cycle touring and a few years ago cycled from Auckland to Reefton with his partner. He is now training to complete the Tour Aotearoa cycle from Cape Reinga to Bluff with a local cycling club and through an interactive cycling programme via Facebook. He is a regular contributor to online cycling forums.

TRAVEL

Nick enjoys getting away for holidays and short breaks, travelling both domestically and overseas. He prefers travelling with his partner or friends. While some getaways revolve around physical recreational activities and events, Nick also enjoys more relaxing weekends – where an ideal day might be a light bike ride in the morning, followed by a few hours relaxing in the sun with a book.

Nick frequently visits his family bach which is only a few hours' drive away from his house, but he also makes an effort to explore and get off-the-beaten track, travelling to places he hasn't been before to experience new things. He enjoys cooking for himself, but while travelling does enjoy a meal with a drink at the local pub after a day's ride.

“I've done quite a few endurance events like Iron Man. I do like a bit of a challenge. This Tour Aotearoa will be challenging but rewarding – to say I've cycled 3000km from the top of the country to the bottom. Something about working the body is rewarding... the challenge I suppose.”

TRAVEL DRIVERS

- Outdoor experiences that provide a challenge
- Tick something off the bucket list - a sense of achievement
- Relax and unwind – experiencing the local area

MEDIA/TRAVEL PLANNING

- Online forums, blogs, clubs, Facebook groups - specific to area of interest e.g. cycling
- Limited social media use
- Group chats on WhatsApp, Viber & Facebook Messenger
- Enjoys reading (e-reader)
- Watches TV at night to unwind and turn off the brain
- Holiday planning often is a long process - having to factor in hiring or bringing equipment etc.
- Don't mind sometimes paying more for operators who offer packages to make life easier

OPPORTUNITIES FOR CENTRAL OTAGO

- Events that embrace and complement what Central Otago is most well-known for (Rail Trail, wine, natural landscape)

MARKETING PROPOSITION

- 'Challenge yourself'

SEGMENT OVERVIEW	WHO ARE THEY?	WHERE ARE THEY FROM?	TOP TRAVEL DRIVERS	MEDIA/TRAVEL PLANNING	MARKETING PROPOSITION & OPPORTUNITIES
<p>ESCAPE & RELAX</p> <p>Busy visitors from structured environments, looking to escape from the routine and pressures of everyday life and relax.</p>	<p>30-60 years</p> <p>Travel alone or as a couple</p> <p>Busy, structured, time-poor people with stable job/career (i.e. corporate, self-employed)</p> <p>Have wherewithal to escape</p> <p>Appreciate quiet/nature</p> <p>Prioritise improving work/life balance and finding time for self/partner</p>	<p>Domestic – Auckland, Wellington, Christchurch, Queenstown</p> <p>Australia – Sydney, Melbourne, Brisbane, WA, ACT</p> <p>Other Internationals - Large European or North American cities</p>	<p>Detach from everyday stress and pressure to unwind in a new environment</p> <p>Take time out to relax alone or spend quality time with partner</p> <p>Recharge – getting away is part of a good work/life balance</p> <p>Connect with the outdoors/nature</p>	<p>Friends/family are highly influential</p> <p>Social media (Instagram & Facebook) inspire holiday ideas</p> <p>Stay in touch with friends through Facebook Messenger and txt/calling</p> <p>Enjoy movies (both home & cinema)</p> <p>Holidays are planned and booked well in advance – through internet search and direct bookings with operators</p> <p>Limited media exposure when travelling - try to detach when away</p>	<p><i>‘Time to relax and re-charge’</i></p> <p>Nature based experiences</p> <p>Promote the small town experience - to get away from the ‘hustle and bustle’</p>
<p>BONDING</p> <p>Visitors looking to spend time and share experiences with family, friends, or a partner.</p>	<p>Couples, groups of friends, or family groups (older children)</p> <p>Spending quality time with family and friends</p> <p>Enjoy activities/experiences</p> <p>Like to make the most of physical health</p>	<p>Domestic</p> <p>Australia</p> <p>Opportunity to broaden</p>	<p>Spend quality time with family and friends</p> <p>Bond over challenging but safe activities that everyone can enjoy – collective achievement</p> <p>Make the most of life, by taking advantage of opportunities to participate in new experiences</p>	<p>Friends/family are highly influential</p> <p>Group chats on WhatsApp, Viber & Facebook Messenger</p> <p>Close group of friends & family on Facebook – often post updates while travelling</p> <p>Browse for deals on daily deal sites such as GrabOne, Groupon, TreatMe</p>	<p><i>‘Spend quality time with family and friends’</i></p> <p>Development of activities that offer broad appeal and can be done by people of all ages and ability e.g. river/lake cruise</p> <p>May be element of nostalgia/family tradition in choosing Central Otago</p>
<p>EXPLORING & DISCOVER</p> <p>Visitors looking to explore and experience the unfamiliar and leave with new skills or knowledge.</p>	<p>Inquisitive, educated, enjoy learning, creative, sociable</p> <p>Wide age range</p> <p>Get pleasure from accomplishment (learning is its own reward)</p> <p>Like sharing knowledge and being recognised for their knowledge - makes them interesting (social capital)</p>	<p>Strongly domestic</p> <p>And special interest international/niches</p>	<p>Discover unique destinations and new experiences</p> <p>Connect with local people for an authentic experience</p> <p>Connect with nature/outdoors</p> <p>Spontaneity/flexibility (‘go with the flow’)</p>	<p>Moderate/high internet usage – often browsing on Facebook and online</p> <p>Information available at the destination or en route (e.g. brochures from i-SITEs) is important - often short lead in times</p> <p>Word of mouth (through other visitors, locals and operators) prior to travel as well as while travelling is influential - enjoy talking and listening to others about experiences</p>	<p><i>‘Discover unique Central Otago’</i></p> <p>Highlight unique offerings (e.g. curling, ice luge)</p> <p>Emphasise history and old townships - possibly a touring route</p>

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<p>PRESTIGE/STATUS</p> <p>Affluent visitors looking to visit unique places and reward themselves by participating in exclusive experiences.</p>	<p>40-65 years</p> <p>Affluent (or able to prioritise travel)</p> <p>Educated professionals</p> <p>Trend-setters (not just keeping up), brand-conscious</p> <p>(Think they) have a lifestyle that others aspire to</p> <p>Spending quality time with family and friends</p>	<p>Domestic – Auckland, Wellington, Christchurch, Tauranga, Queenstown, Wanaka, Hawkes Bay, Nelson</p> <p>NZ based Chinese</p> <p>Canada & US – well travelled</p> <p>Large European cities</p> <p>Australia</p>	<p>Indulge in a bit of luxury and comfort</p> <p>Interact with other guests and locals</p> <p>Discover unique and authentic experiences</p>	<p>Social media - post updates on Facebook to stay connected with friends & family</p> <p>Frequent catch ups with friends in person or by phone (major influencer in deciding where to travel)</p> <p>Regular smart phone and laptop users - pop up news feeds</p> <p>Enjoy reading books (and magazines/newspapers)</p> <p>Enjoy going to the movies or theatre</p> <p>Book travel in advance and will often use travel agents – convenience and confidence (that they have knowledge of the area)</p>	<p><i>‘Indulge yourself’</i></p> <p>Wine tourism</p> <p>Events - Food & wine festivals</p> <p>Luxury stay experiences</p> <p>Immerse in local experiences</p> <p>Build personal relationships – to influence future travel</p>
<p>PERSONAL CHALLENGE & ACHIEVEMENT</p> <p>Visitors looking to push their own personal limits and challenge themselves through physical activity.</p>	<p>Baby boomers & younger generation</p> <p>Heavily involved in outdoor active recreation (e.g. hiking, mountain biking/cycling, snow-based activities, hunting & fishing)</p> <p>Enjoy finding new challenges</p> <p>Work/life balance is important</p>	<p>Mostly domestic and Australian</p> <p>Wider opportunity with targeted events</p>	<p>Outdoor experiences that provide a challenge</p> <p>Tick something off the bucket list - a sense of achievement</p> <p>Relax and unwind – experiencing the local area</p>	<p>Online forums, blogs, clubs, Facebook groups - specific to area of interest e.g. cycling</p> <p>Limited social media use</p> <p>Group chats on WhatsApp, Viber & Facebook Messenger</p> <p>Enjoys reading (e-reader)</p> <p>Watches TV at night to unwind and turn off the brain</p> <p>Holiday planning often is a long process - having to factor in hiring or bringing equipment etc.</p> <p>Don't mind sometimes paying more for operators who offer packages to make life easier</p>	<p><i>‘Challenge yourself’</i></p> <p>Events that embrace and complement what Central Otago is most well-known for (Rail Trail, wine, natural landscape)</p>

