

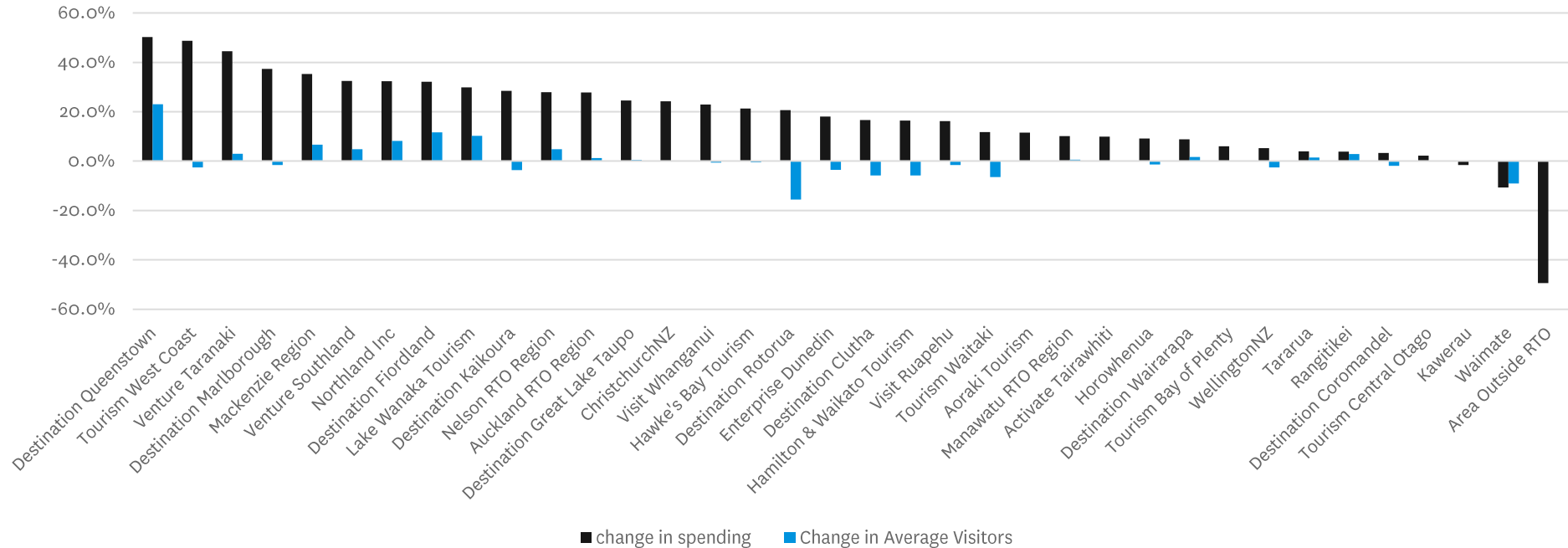


BYATA – DOMESTIC Update

10 March

Kiwis have Done Something New: +21% domestic spend this summer*

Kiwis have spent +21% on tourism product this summer. Almost all regions have seen an increase in domestic spend. Domestic visitor volume has been stable at -1%.



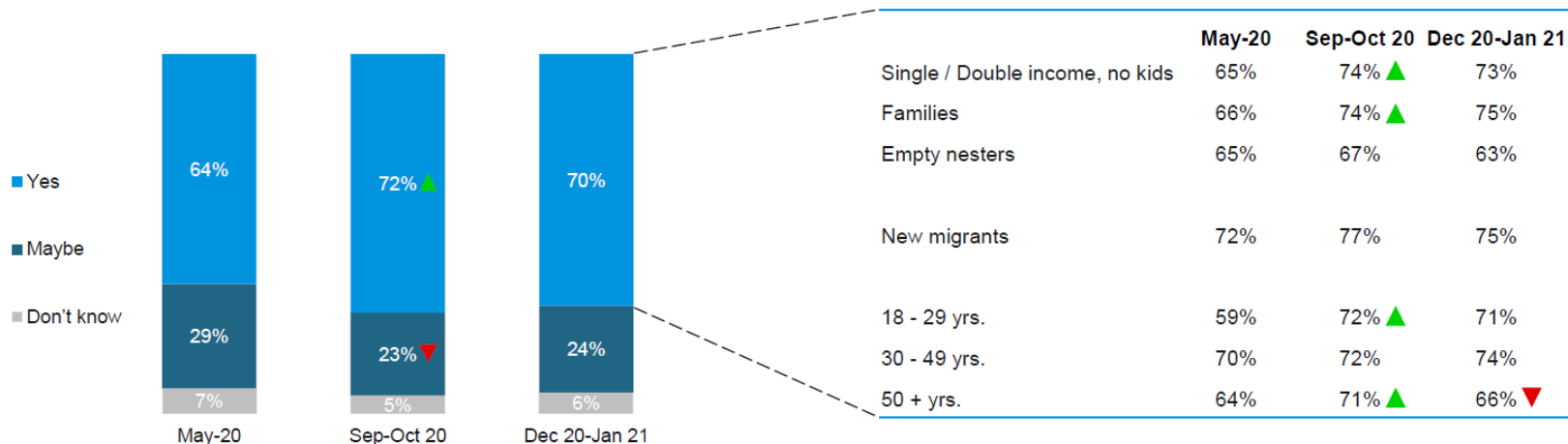
Note: Spend Data based on TECT, Average Visitors on Dataventures Data

*Period: 23 December 2020 – 10 January 2021

The appetite for a domestic holiday remains strong

70% of Kiwis are intending to holiday domestically

% NZers intending to holiday domestically in the next 12 months – total and by segment



▲ ▼ Significantly higher / lower than previous quarter

KANTAR

Sample size: May-20 n = 757, Sep-Oct 20 n = 1208, Dec 20-Jan 21 n = 1204

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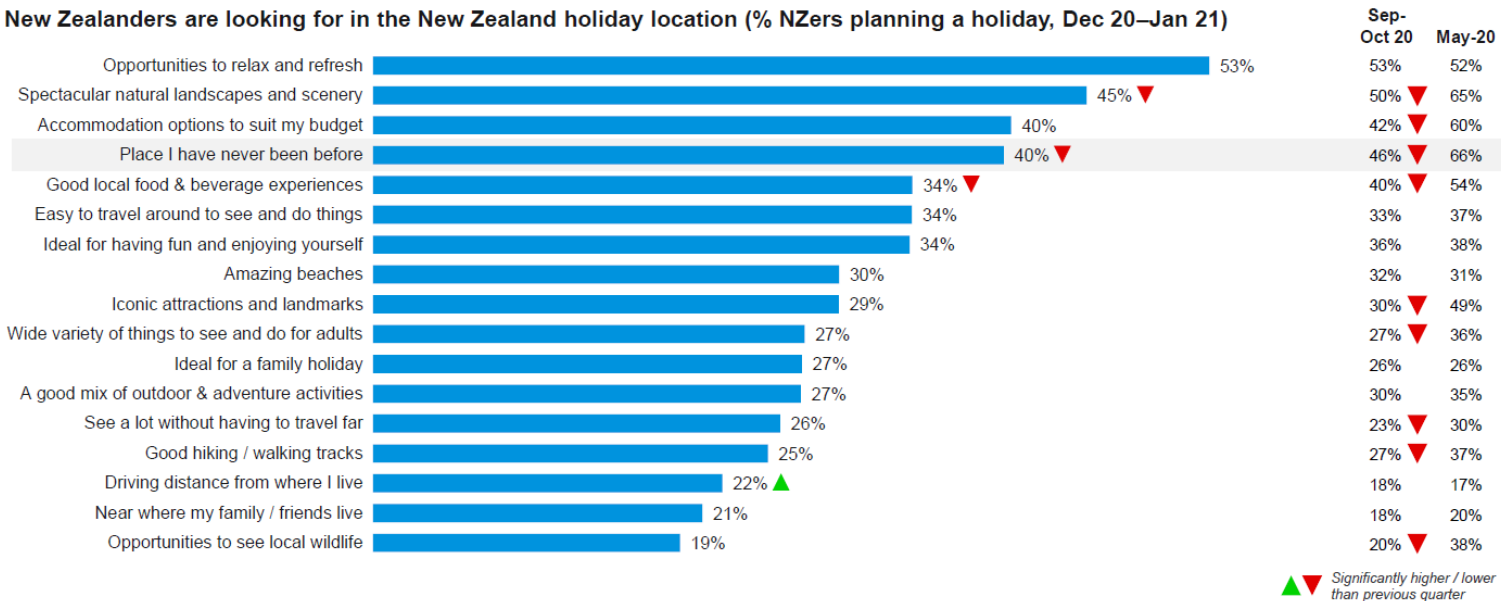


**100% PURE
NEW ZEALAND**

Relax/Refresh and Landscapes/Scenery are key drivers

“Place I have never been before” has dropped as a travel motivator, likely indicating that Kiwis have visited something NEW

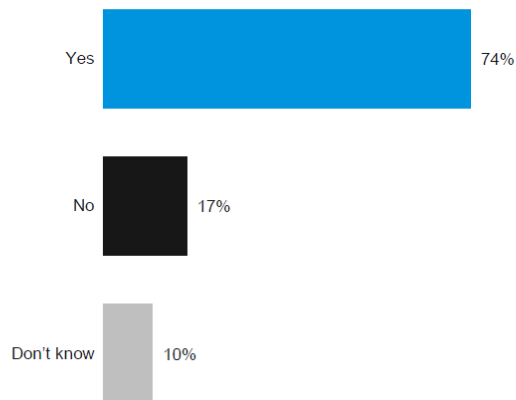
Aspect New Zealanders are looking for in the New Zealand holiday location (% NZers planning a holiday, Dec 20–Jan 21)



Strong engagement with Do Something New continues

Campaign metrics suggest Kiwis are enjoying the campaign and are interested to see more NEW

Have you seen or heard of the “Do something new Zealand” campaign
(Jan 21)



KANTAR

Sample size: Jan 21 n = 902

Domestic paid activity - Summer, Urban Leisure & Always on Search
(December 2020 - January 2021)

- 225 million impressions
- 1.75 million clicks
- 8.3 million video views
- 488,200 visits to newzealand.com
- 44,110 business referrals
- 12.33% referral rate



Domestic is key for April to October

Domestic Travel occurs year round – with growth opportunities particularly in months where international travel weakens

Value of Domestic significantly higher than International

	Year	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Domestic Spend (MRTE)	2019	\$1.72 b	\$1.40 b	\$1.55 b	\$1.52 b	\$1.30 b	\$1.26 b	\$1.42 b	\$1.30 b	\$1.34 b	\$1.49 b	\$1.46 b	\$1.83 b	\$17.59 b
	2018	\$1.71 b	\$1.40 b	\$1.61 b	\$1.45 b	\$1.29 b	\$1.29 b	\$1.40 b	\$1.32 b	\$1.36 b	\$1.48 b	\$1.40 b	\$1.77 b	\$17.47 b
	2017	\$1.62 b	\$1.34 b	\$1.45 b	\$1.44 b	\$1.19 b	\$1.20 b	\$1.34 b	\$1.20 b	\$1.27 b	\$1.43 b	\$1.36 b	\$1.82 b	\$16.65 b
International Spend (MRTE)	2019	\$1.45 b	\$1.46 b	\$1.27 b	\$0.99 b	\$0.72 b	\$0.63 b	\$0.81 b	\$0.86 b	\$0.75 b	\$0.94 b	\$1.16 b	\$1.48 b	\$12.52 b
	2018	\$1.39 b	\$1.44 b	\$1.25 b	\$0.91 b	\$0.70 b	\$0.59 b	\$0.75 b	\$0.80 b	\$0.73 b	\$0.88 b	\$1.13 b	\$1.39 b	\$11.94 b
	2017	\$1.29 b	\$1.24 b	\$1.15 b	\$0.89 b	\$0.65 b	\$0.60 b	\$0.72 b	\$0.72 b	\$0.64 b	\$0.80 b	\$1.05 b	\$1.35 b	\$11.10 b
International Arrivals	2019	399,342	417,906	378,294	307,359	219,306	213,492	255,594	251,208	261,756	283,911	372,120	528,255	3.89 m
	2018	378,348	422,922	387,921	283,503	221,523	211,821	250,041	246,102	257,475	282,897	385,857	529,227	3.86 m
	2017	379,128	378,567	342,828	310,716	208,587	229,551	246,639	233,661	252,420	269,802	359,283	512,211	3.72 m

Campaign Calendar

FY21	Q3												Q4																				
	Jan			Feb			Mar			Apr			May			Jun																	
	11/01/21	18/01/21	25/01/21	1/02/21	8/02/21	15/02/21	22/02/21	1/03/21	8/03/21	15/03/21	22/03/21	29/03/21	5/04/21	12/04/21	19/04/21	26/04/21	3/05/21	10/05/21	17/05/21	24/05/21	31/05/21	7/06/21	14/06/21	21/06/21									
Season	SUMMER												AUTUMN												WINTER								
Key Seasonal Triggers	School hols/Wgtn Aniv/AKL Aniv				Waitangi								Easter		School hols/ Anzac Day									Q Bday									
Paid																																	
Firework Moments							TVNZ Travel Guides New Zealand, Firework 3															Firework - TBC											
Firework Moments							TVNZ Breakfast, Firework 4		COVID alert level change							TVNZ Breakfast, Firework 4																	
Campaign Execution	#DSNNZ Short Breaks / Urban Inspo : Primary Segment Sink/Dink						COVID alert level change		#DSNNZ Family / School Holiday Inspo : Primarily Families						#DSNNZ Fmally + #DSNNZ Active Recharging in market overlap			#DSNNZ Active Recharging: Primarily Empty Nesters)						#DSNNZ Winter									
JV Trade Partner									House of Travel City Breaks JV campaign 15-28 Feb						Flight Centre Families JV campaign 10-24 Mar			House of Travel Families JV campaign 22-4 Mar															
JV Trade Partner	I-SITE																																
Level 2 - Regions																																	
Focussed support																																	
Paid Content campaign																																	
NZ Operators - Ring																																	
AO - Audience Signals																																	
Earned																																	
Campaign aligned activity	Short Breaks / Urban						Families						Active relaxers						Winter														
Event/Partnerships/Content/press releases					Activation		Firework																										
Stuff (2 x articles per week)	Tasman		Wellington		Wairarapa		Manawatu-Whanganui		Taranaki		Hawkes Bay		Hawkes Bay		Gisborne		Central North Island		Central North Island		Central North Island		Waikato & Raglan										
NZME (8 pgs of dom p/wk for 3 wks/mth + entire issue of Travel supplement in 4th wk)			Urban Adventures				Relax and Refresh				Family Travel				Nature and Wildlife				The guide to winter holidays				The luxury list										
Domestic Strategy on a page																								TNZ Domestic Market Plan FY21		RTO Market Plans		Shoot schedule		Content partnerships		Explore	

FAMILIES CAMPAIGN NOW LIVE!

Campaign dates: 8 Mar – 30 April

Family campaign – channel activity

CLARITY

TV & VOD

Evolved song -
15” edit

Cinema

Evolved song -
30” edit

Social Video

Evolved song -
6” edits

INSPIRE

Online video

Have you ever
- 15” & 6” edits

Social video

Have you ever
- 6” edits

REWIRE

Audio

Radio skew to drop off/pick up times

OOH

Proximity to schools & activities

Social

Rewire creative

Influencers

Native

Content drivers to Newzealand.com &
NZME/Stuff Articles

Paid Search

Partnership – Kidspot

BOOK

Social

Family friendly book creative/
packages

Dynamic Display

THL offer & family friendly
book creative/ packages

Native

THL offer & family friendly
book creative/ packages

Paid Search

Trade Partnerships

Family campaign deals & packages

Family friendly campaign deals

- Tourism Business Database (TBD) development built allowing operators to submit deals to complement the 'Domestic – Family campaign'
- 300+ operator family deals submitted to date
- All family campaign deals built into a dedicated family deals hub on newzealand.com

Package deals

- Worked with operators & RTOs to curate multi-operator package/bundle/combo deals
- 50+ regional package deals submitted & built into deals hub
- 7 'HERO' packages featured in paid social & display to drive traffic to newzealand.com
- Package deals featured across Stuff, NZME and Kidspot content

Operators can upload deals at any time during the campaign period – it's not too late!

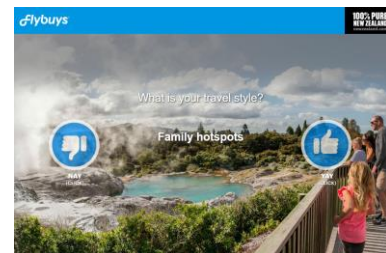
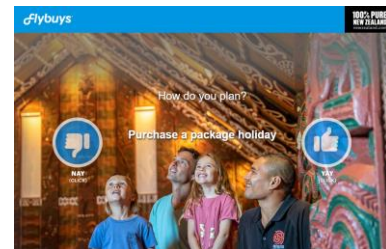
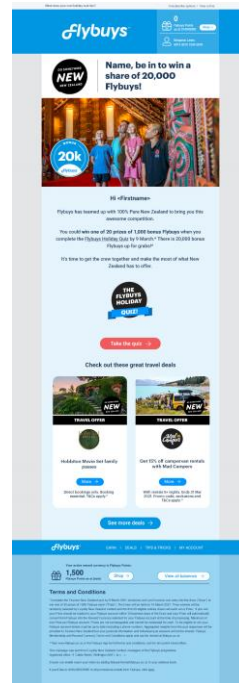
The screenshot shows the '100% PURE NEW ZEALAND' website. At the top, there's a navigation bar with a menu icon, the brand name, and a search icon. Below this, a section titled 'FIND FAMILY DEALS IN NEW ZEALAND' is displayed. A paragraph of text explains that the site offers family activities and holiday packages to reduce planning stress. Below this, a note states that deals refresh often and encourages users to check back. A 'Jump to:' section lists links for 'Activity deals', 'Accommodation deals', and 'Campervan deals'. Further down, a 'Family packages' section features two cards. The first card, 'Sail, Cycle & Culture Bay of Islands', includes details about a 3-night apartment stay, a sailing trip, a day cycle, and a Treaty Grounds Pass, with a price of \$1341 NZD for 2 adults and 2 kids. The second card, 'Family Stay 2 n', shows a 2-night wildlife and culture package for \$620 for 2 adults. Both cards have a 'More information' button and a rating of 5 stars.

Flybuys partnership update



Family campaign integration into Flybuys partnership. Leverage 2.8 million Flybuys audience to drive additional operator referrals, and build preference for newzealand.com

- Quiz to be sent via EDM & social media to Flybuys family audience to gain key insights into typical travel behaviour
- Use quiz insight and data to target engaged family audience with relevant deals & offers from TBD family campaign deals
- Host relevant and appealing family campaign deals on Flybuys deals hub
- **Mid-campaign period:** Click through from EDM & Flybuys deals hub to co-branded TNZ + Flybuys microsite to view all campaign deals



ACTIVE RECHARGE

Campaign dates: 19 April – 6 June

Campaign overview

Job to be done

Encourage New Zealanders to take a domestic holiday in the autumn/early winter period

Campaign timing

Shoulder season - a time of year that's not warm enough for the beach, not cold enough for snow, post easter, pre and post school holidays. We have a real opportunity to get Kiwis travelling during a non-typical travel period.

Target audience

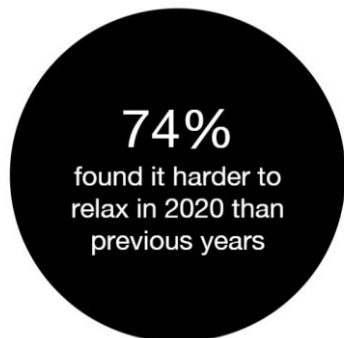
Quality Life Seekers, those with fewer dependents, more disposable income, a greater desire to do something new

- Empty Nesters
- Single, and double-income households with no kids' (SINKS/DINKS)



Audience Insight

After a year of multiple lockdowns and restrictions research has shown many New Zealanders, especially our target are **feeling exhausted.....**



The repercussions of a virus

Covid Stress has long term implications.

Felt stronger by employed empty nesters.

2020 left employees feeling disengaged, burnt out, and downright exhausted – what can leaders do?

Audience Insight

Resulting in our audience wanting to **relax**, 73% want to take more time for themselves....which they're trying to resolve with holidays that involve doing less. Why?

It's to recharge those batteries



Relaxation for them is doing fewer things, and more familiar things because logically...it's not doing something new....

Less activities = More relaxation
More familiar = Less stress

Audience Insight

Research confirms that creativity and physical activity can recharge you, and that doing less will not. Doing more, and **New** is key...

Benefiting from creative activity: The positive relationships between creative activity, recovery experiences, and performance-related outcomes

Kevin J. Eschleman , Jamie Madsen , Gene Alarcon , Alex Barella 

First published: 17 April 2014 | <https://doi.org/10.1111/joop.12064> | Citations: 32

Creativity = recharge

Exercising the worry away: How inflammation, oxidative and nitrogen stress mediates the beneficial effect of physical activity on anxiety disorder symptoms and behaviours

S. Moylan ^{a, R. H. A. Eyre ^{b, c, M. Maes ^{d, B. T. Baune ^{b, F. N. Jacka ^{a, M. Berk ^{a, e, f, g}}}}}}

Physical activity = recharge

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STRESS

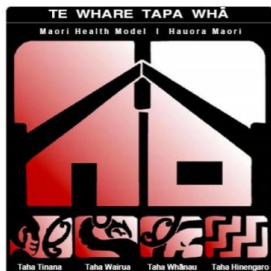
Resilience Is About How You Recharge, Not How You Endure

by **Shawn Achor** and **Michelle Gielan**

JUNE 24, 2012

Stopping does not equal recharge

Perfectly aligns to the government's Maori wellbeing model.



Recharging
Taha tinana
(physical
health)

Recharging
Taha wairua
(spiritual
health)

Recharging
Taha
hinengaro
(mental
health)

Recharging
Taha whānau
(family health)

Campaign challenge

Convince Kiwis that doing something 'new' is more recharging than doing the same thing

Solution: Do Something *New* to Recharge!

CLARITY

Clearly communicate to Kiwis there is a countrywide need to recharge this shoulder season

REWIRE

Rewire perceptions from: for Kiwis to relax, Kiwis should do less.
When in fact, to recharge, Kiwis should do something new.

INSPIRE

Inspire Kiwis with the various tourism activities that can help them recharge on a domestic holiday.

BOOK

Facilitate bookings of recharging tourism activities.

SHARE

Encourage Kiwis to spread the word that the best way to recharge on holiday is to do something new, by sharing their experiences.

Campaign creative

Introducing New Zealand's first ever Recharge Season...

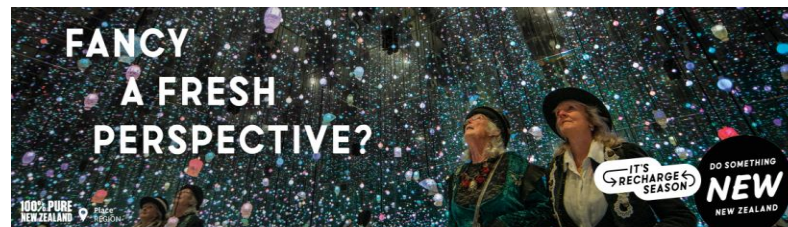
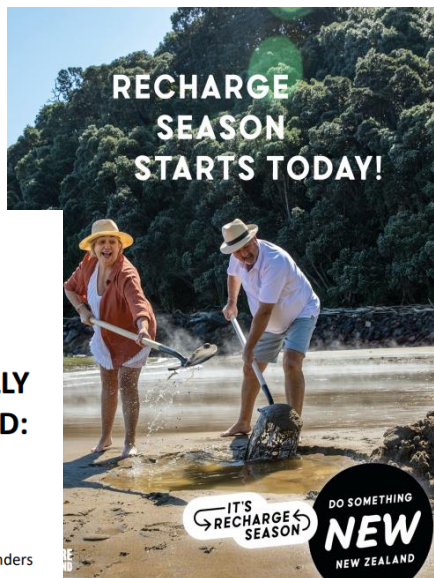
100% PURE
NEW ZEALAND

FOR IMMEDIATE RELEASE:

TOURISM NEW ZEALAND OFFICIALLY LAUNCHES A NEW HOLIDAY PERIOD: 'RECHARGE SEASON'

Tourism New Zealand today announced that it is officially renaming the April-May holiday period 'Recharge Season'. With exhausted New Zealanders needing to recharge more than ever before, the new Recharge Season encourages kiwis to plan and enjoy a proper holiday.

Known to the tourism industry as 'shoulder season', the move to rename the autumn off-peak travel season comes after results of a nationwide survey revealed that 73% of Kiwis feel more stressed than ever as the impact of an unsettling 2020 continues to reverberate.



Book layer product strategy

Feature tourism products that Kiwis can do in New Zealand to recharge their batteries during this shoulder season. We will feature tourism products across 4 product categories/4 ways to recharge;

Recharging the body	Recharging the mind	Recharging relationships	Reconnecting with culture
Dolphin Swimming Kaikoura Queen Charlotte Hike Dig This Mt Maunganui Lake Dunstan Cycle Trail	Volcanic Air Rotorua Waimangu Volcanic Valley Race track Cromwell Steam Punk Fox Glacier	Palliser Estate Hokitika Treetops Waiheke Botanical Distillery Tantalus Estate Sounds Mail Cruise	Mataatua Marae Pukaha Wildlife Centre Hole in the Rock Heli Karitane Māori Tours Waitangi Treaty Grounds
<i>Active tourism products</i>	<i>Tourism products that inspire/activate the mind</i>	<i>Tourism products that are typically shared</i>	<i>Maori/cultural tourism products</i>

How can operators get involved – campaign deals and packages

Load campaign deals and packages;

1. Curate a deal/package to complement this campaign
2. Match the offer/product to the campaign period
3. Build the offer into operator website and upload to newzealand.com, as a deal

Product initiatives:

- Encourage operators to display mid-week/shoulder season pricing, allowing for price to appear more competitive – alignment to key campaign messaging
- Inform operators on top performing value propositions on nz.com e.g. Percentage off or compelling price point most effective deal type on newzealand.com
- Encourage deals to be simple; short deal description, and clear pricing structure e.g., per person price or per couple price, or % off

Recharging relationships

Recharging the body



Do Something New Cycle, Walk, Kayak

Wilson's Abel Tasman
All inclusive from Nelson
April Shoulder Season Pricing

Per Person Save
\$200^{NZD}

[More information](#)

Abel Tasman Wilson's Experiences



Romance by the Water's Edge Share special times

Explore Wanaka
Luxurious lakeview apartment
Bubbles, dinner, breakfast

Per Night, Per Couple, From
\$613^{NZD}

Massage And Late Check Out!

[More information](#)

Edgewater - Lake Wanaka

What is the benefit to operators?

1. **Referrals.** In January, over 700,000 Kiwis visited newzealand.com, resulting in over 80,000 operator referrals (click from newzealand.com to the operator website). Interaction with newzealand.com has never been more relevant for reaching the domestic consumer.
2. **Visibility.** TNZ campaign activity reaches millions of kiwis with relevant messaging, operators now have an opportunity to be present with a relevant deal.
3. **Exposure.** Any deal/package loaded to newzealand.com by a Qualmark operator/Qualmark registered operator could be selected by a media/content partner to feature in above the line activity, during the campaign period.
4. **Conversion.** Working hypothesis that if we present relevant and appealing product and deals to the audience in which we are targeting, we will increase the number of direct bookings.

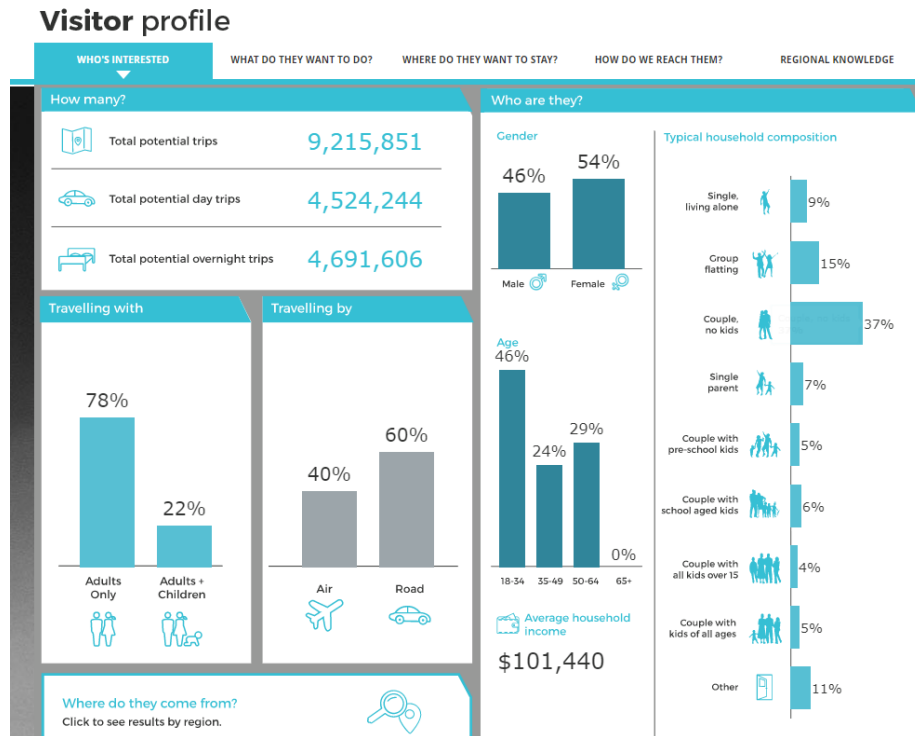
Winter campaign

Monday 7th June - 18th July

Objective: Getting Kiwis to re-think a New Zealand winter holiday and realising that it's about so much more than just hitting the slopes.

Our primary opportunity is to get non-skiers to take a Domestic winter holiday rather than just hitting up their local hot pools or jumping on a plane to the Islands or the Gold Coast (if this is an option come June-July 2021).

Our secondary opportunity is to get existing skiers to add on additional activities around their days on the slopes and extend their winter holiday.



THANK YOU NGĀ MIHI

More information: www.tourismnewzealand.com

Sign up to our newsletter: www.tourismnewzealand.com/newsletter-signup