



FORWARD

ANNEX ONE: FOR PUBLIC RELEASE LATE NOVEMBER 2015

China FIT Visitor Market Research

High level qualitative insights summary



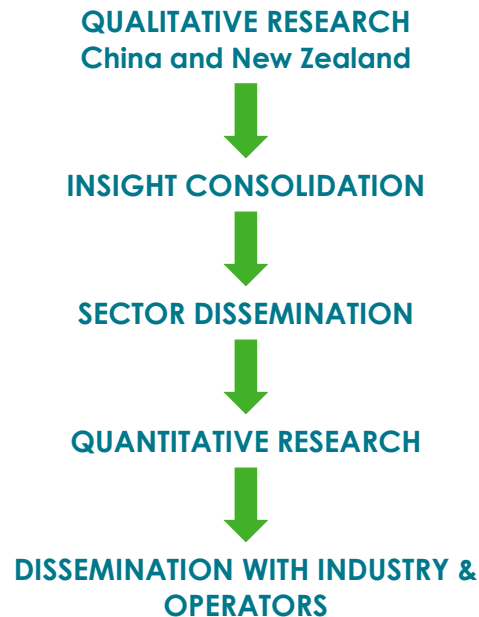


THE OVERALL TASK

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

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

The process





THE ROLLOUT TIMING

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

NAVIGATION OF MODULES

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

CHINA FIT & THEIR NEEDS	DIGITAL DEVELOPMENT & CONNECTION
<i>Meeting cultural needs</i> 1. The Context: Understanding needs and attitudes to better deliver value 2. Enabling and optimising experiences	<i>Opportunity for connectivity and building reputation</i> 8. Digital Strategy Development Getting your message in front of the China FIT Digital planning and building Strategies for content dissemination Sharing – tools needed Other digital consideration – resourcing and management How to
3. Developing stories and icon experiences Developing and delivering unique stories relevant to #NZCN 4. Optimisation of current offer 5. Product and experience development Building value 6. Special interest Activating Chinese interest and delivering regionally 7. Keeping a finger on the pulse Understanding how to optimise relevance and delivery <i>Activating value</i>	 9. Seasonal development & activation 10. Regional development and activation Targeting Sector enablers <i>Enabling growth and development opportunities</i>
DELIVERING RELEVANT PRODUCTS & ACTIVATING VALUE	4 GEARING UP THE SECTOR FOR VALUE MAXIMISATION



FORWARD

SUMMARY OF RESEARCH



THE CONTEXT

Understanding China FIT travel behaviour and needs, to improve experience and drive value



Travel is fundamentally important to Chinese FIT

Socially and experientially. They travel multiple times annually



New Zealand is highly desirable

Our ordinary is their extraordinary



Increasing outbound FIT Tourists

Growth projected



Strong repeat visitation if they like it

Many will come again



These sophisticated travelers have many options

We must deliver

→ Potential for very strong growth

- Management to target higher value visitors.
- Regional and seasonal growth is an opportunity.

→ Dispersal is an opportunity and also a need, to ensure we continue to offer great experiences.

→ We must build value and maintain premium experiences and pricing.

- By targeting higher value customers.
- Through our welcome, storytelling, customer experience, accessibility, assistance, knowledge, safety, and by being new and different.



THE CONTEXT

Need to optimise experience for FIT and reduce risk

→ Everything close is a fundamental aspect of the desirable New Zealand experience.

This should be woven into all we offer: zero distance immersion; *feel it, see it, touch it, do it, taste it, share it.*

Delivering this with a degree **of intensity and drama** creates increased desire and value.

→ Guides and assistance

Some Chinese FIT currently see a support gap in New Zealand

Especially for the less confident independent traveller

There is a need for good quality professional guidance



Personalised
In attractions
Special interest
Chinese language

Opportunity to build i-SITE knowledge understanding and delivery



Free
Everyone welcome
Official NZ service
Chinese language options and speakers

The concierge role at hotels and accommodation is very important



Opportunity for higher level of Mandarin speakers in tourism sector overall and more translated information



→ Navigation & digital access

Geolocation, GPS navigation, Cell phone coverage - all deliver a feeling of security and enable help to be called if required.

Internet searches for translation services, links to language on the web and product information in Mandarin is important to enable understanding, booking and participation.

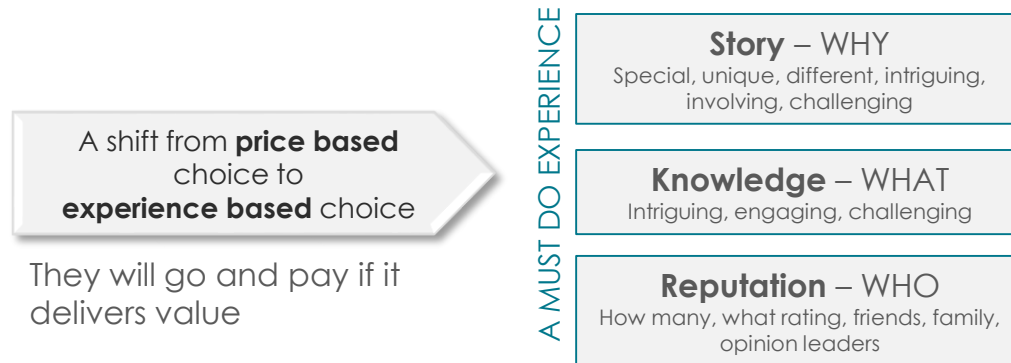
Access to cell phone coverage and data through free Wi-Fi is central to this and needs to be considered in key tourist locations and popular cycle and walking areas and tracks.

THE CONTEXT

Building Icon experiences

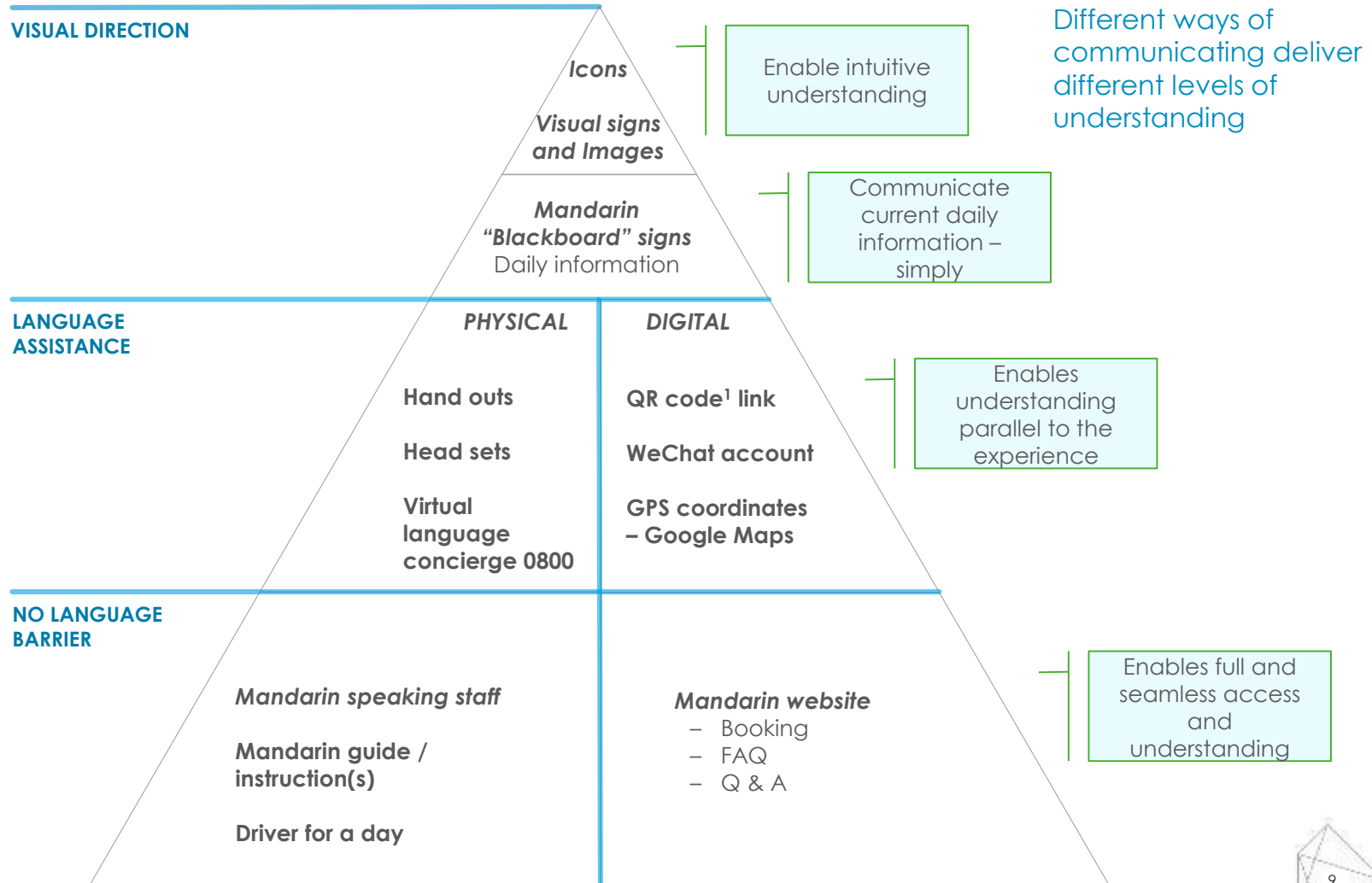


→ It is important to build knowledge of more and different icon experiences



中文 CHINESE

LANGUAGE IS CORE TO CONNECTION & THEN TO EXPERIENCE



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

THE CONTEXT

Targeting



Not all Chinese FIT are the same:

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

Targets that offer substantial potential are.....

Tourism New Zealand Segmentation:

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

Trip Order:*

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

Self employed:*

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



Families with:*

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

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



Cluster/Group Ethos
*Their needs are an important
consideration*

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



SEASONAL DEVELOPMENT & EXTENSION

There is a strong propensity for extended seasonal development.

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

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

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

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

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

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

OPPORTUNITIES TO DRIVE SEASONAL TOURISM



→ Follow their seasons

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

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

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

→ Target High End Families – School Holidays – 1st June to 1st September – potentially substantial

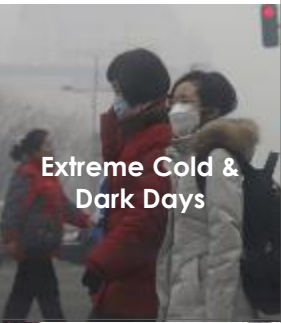
- Strong school holiday appeal for family bonding and relaxed temperate/cool experiences of New Zealand. They want to escape the oppressive heat in China.
- New Zealand has temperate winter conditions (our winter is like the Chinese spring or autumn). In photos, show the layers of clothing, green grass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

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

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

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

SEASONAL DEVELOPMENT

	THE CHINA NEED – Chinese FIT in CHINA		THE NEW ZEALAND OPPORTUNITY – for CHINA FIT in New Zealand to:		
	HOLIDAY TRIGGERS	ESCAPE FROM	REGIONAL	NATIONAL	INTEREST
DEC – FEB  Winter	Chinese New Year (10 days) + Winter School Break (2 weeks) Combined = 1 month window of China FIT	 Extreme Cold & Dark Days	 Enjoy temperate warm weather - Moving away from main tourist locations/crowds	Warm, fresh, clear sky (compared with Europe)	- Adventure - Sailing - Flying - Fishing - Food - Glamping - Kayaking - Trekking (day+)
MAR – MAY  Spring	No National Holidays but a good time for Entrepreneurial / Self Employed to Travel outside of Chinese holidays Tier 2 Cities + GuangZhou FIT	 Peak Travel Crowds	 Independent travellers – celebrate natural beauty and sense of freedom	Settled weather – temperate Non Chinese experience – uncluttered, peaceful, relaxed Access it all – beach to mountain New Zealand at a relaxed pace	- Hike/walk - Camp/glamp - Hot water beach - Photography – light contrasts - Food
JUN – AUG  Summer	School Holiday 1 June – 1 September (combined is an 8 week window of China FIT)	 Soaring Heat, humidity & Pollution	 Temperate cool beauty	Temperate cool season Outdoor freedom, peaceful, invigorating All year round activities Extended family experiences Good daylight	- Hot pools/thermal - Ski – play, learn, do - Whale migration from Antarctica to the tropics - Food
SEP – NOV  Autumn	National Day Holiday and Mid Autumn Festival (combined is about a 1 month window of China FIT)	 Travel Crowds of other destinations	 Fresh rejuvenation – go where there are no crowds	New growth Away from the "maddening crowds" – of Europe, Korea, South East Asia, North America Immersion	- Gardens - Biking - Golf - Adventure - Family - Food

Taupo: Highlighting different experiences across seasons

February



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

August





REGIONAL VISITATION

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

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

1st trip: need = overview and familiarisation – key main sights.

FIRST VISIT



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



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

Implication =

- Most first time visitors have similar places and experiences on their itineraries.
- There is also an awareness that this is the case and there is a desire to get away from the Chinese crowds in the main places.

"I don't want to go and see the same people as in China".

Opportunity =

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



REGIONAL VISITATION

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

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

FIRST VISIT



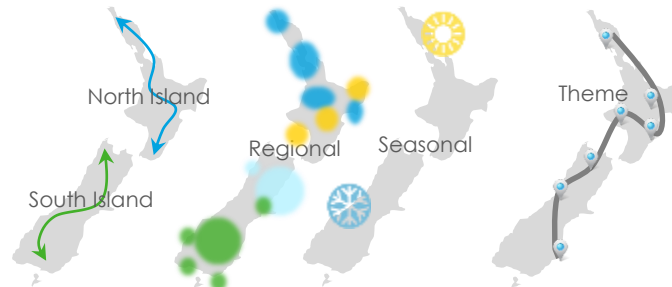
- Overview to get a feel for the most popular experiences
- Or focus on one area - North or South Island

Travel and experiences in New Zealand are new. Tend to stay for a short time in each place, limited time available.

The first trip is to discover how to see and experience New Zealand. For the second trip – they will seek knowledge about what to focus on in more depth, what to spend more time on.

FORWARD

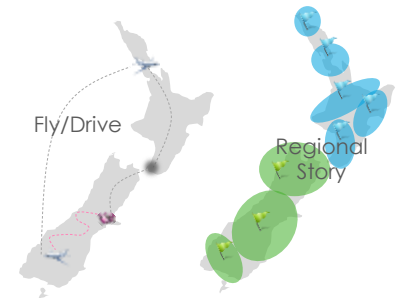
SECOND VISIT



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

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

OPPORTUNITY

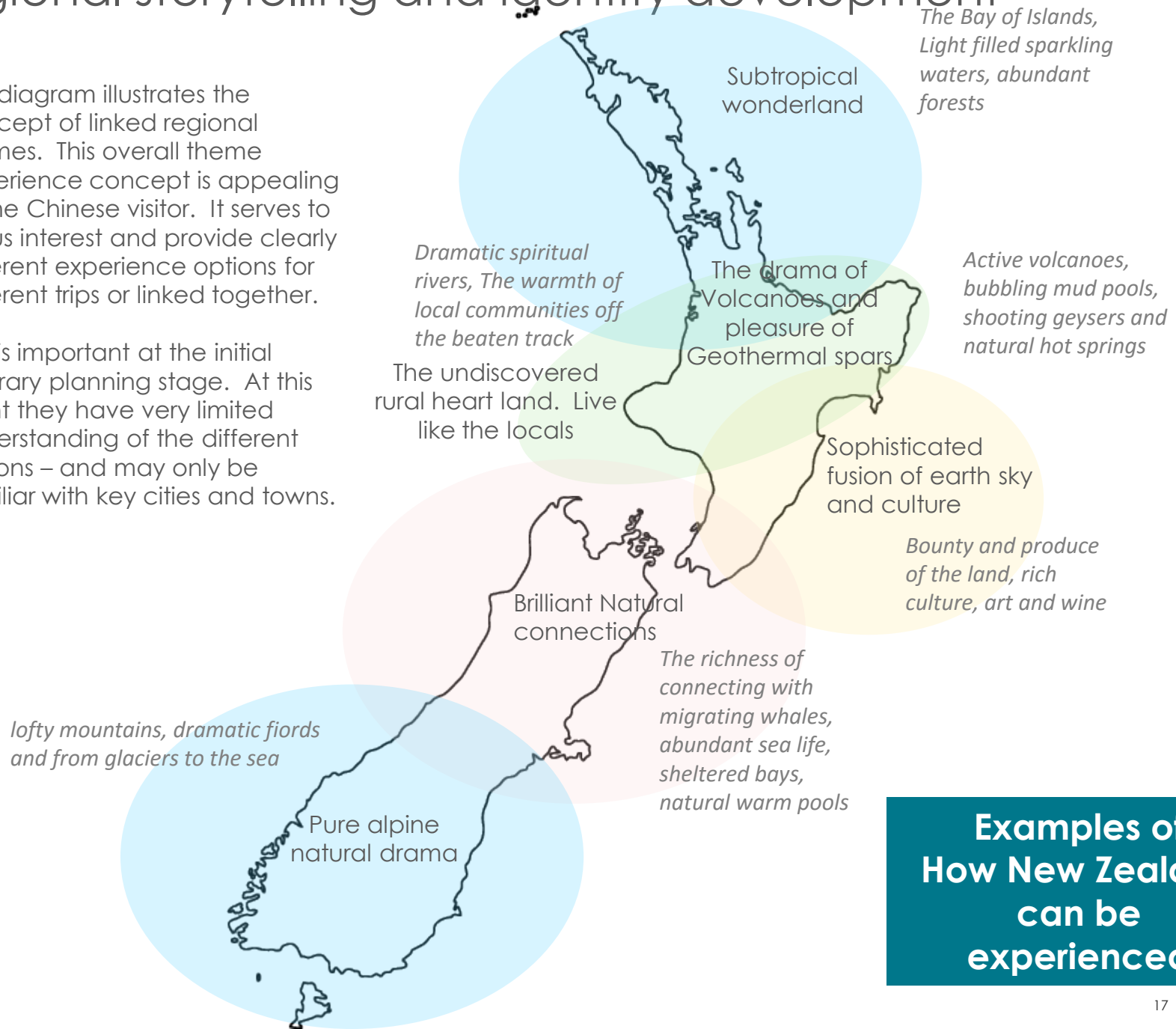


- Special interest localised and personalised experiences
- Following regionally differentiated itineraries/experiences
- There is opportunity to further build linked regional theme experiences – a number of regions together or an experience focus throughout the country – e.g. walking/hiking. These differentiating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

Regional storytelling and identity development

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

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



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

BUILDING REGIONAL DISPERSAL PATHWAYS TO DEVELOPMENT



Collaborate and unite the 4 channels for building regional dispersal

Target:

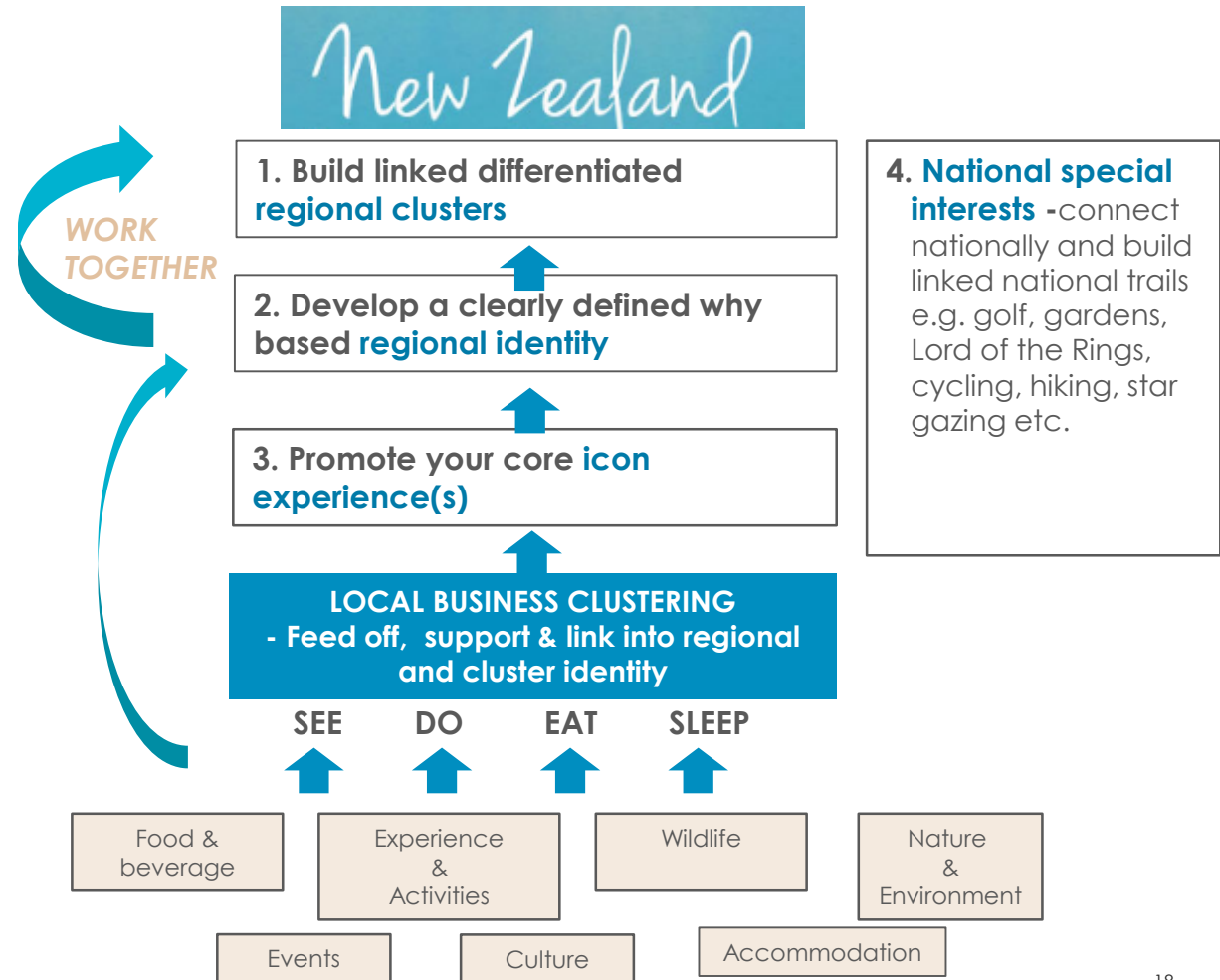
- Repeat visitors
- Longer stay visitors
- Families

Build:

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

Support:

the “everything close” proposition





REGIONAL DEVELOPMENT

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

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

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

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

Building Value

PRODUCT DEVELOPMENT

~ Everything Close ~

DEVELOP EXISTING PRODUCT

AWARENESS

Make it accessible

invitation

WHAT

VALUE

Tell people why

storytelling

WHY

EXPERIENCE

Layer and trade up

options

HOW

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

- Unique
- Special
- Different
- Compelling
- Renowned

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

EXTEND WITH WHAT WE HAVE

REGIONAL

Our ordinary is their extraordinary in more places

SEASONAL

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

NATIONAL

Special interest

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

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

National

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

Local Icon

- E.g. southern lights, rock walk

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

NEW PRODUCT DEVELOPMENT

FAMILY

Family time
Building memories

ADVENTURE

Enabled stimulation

FOOD

The best "must do"

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

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

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

CONTINUOUS REVIEW & IMPROVEMENT

ASK YOUR CUSTOMERS

DEVELOPING STORIES AND ICON EXPERIENCES



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

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

WHY – feeling	Experience the excitement...
WHAT – thinking	The world's fastest...
HOW – doing	Three levels of... Choose to...

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



PRODUCT DEVELOPMENT – THE FAST CHECKLIST

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

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



SPECIAL INTEREST OPPORTUNITIES

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

A part of a New Zealand experience

Choices and options to experience on the New Zealand trip

Planned or incidental, available throughout New Zealand

Food:

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

Wine & beer & specialist beverage

Cycling

Walking

Farm animals/alpaca

Specific

Why
What
When
Where

Support experiences

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

Anchor experience

"Must do inclusion" + guides itinerary planning

Single itinerary anchor, booked ahead

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

DEVELOPMENTAL

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

"SMALL"

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

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

Theme experience:

Guides the whole itinerary planning

Major focus – multi day activity

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

DEVELOPMENTAL

Food

HIKING: A SPECIAL INTEREST EXAMPLE



Relevance Overall	• Relevant to a specific targeted group. - the adventurous, who are travelling to places like Tibet, Tasmania and other National Parks. • Low general appeal, but increasingly aspirational. • Not a 'must do' but an 'I'd like to in the future'.
Issues	• Timing on strict itineraries doesn't allow luxury of walking. Chinese generally are not aerobically fit – fear of exhaustion and overdoing it prevents Chinese visitors walking trails. • Little or no awareness of New Zealand having UNESCO World Heritage Status in National Parks. Tongariro and South West South Island. • It's part of a specific special interest, not of general appeal. • Information and navigation with no English is difficult – they may not understand the protocols for managing personal safety. • Few Mandarin speaking guides to help if needed. Without good real time track information in Mandarin, visitors could encounter real difficulty, especially with changes in the weather. • They are not used to going to places where there is no GPS or Wi-Fi coverage to seek help. This makes them anxious.
Risk	• No understanding of the difference between a walk and a trek in New Zealand. There's a great possibility they could be unprepared.
Targeting	• Target special interest trekking enthusiasts in China. With previous experience in Nepal or similar.
Opportunity	• Promote through targeted social media and trekking channels. • Promote better developed tracks – “Great 10 Walks of New Zealand”. Where guided walking is available. • Ensure Mandarin safety information is available on New Zealand official web sites.
Development	• Personalised guided walks tailored to individual needs. • Shortened versions: – Fly and walk – Boat and walk (Queen Charlotte, Abel Tasman). • National network promotion in targeted specialist channels in China. • Clear facilities and gear requirements and safety protocols (including food and cooking needs) in Mandarin online.



NEW ZEALAND: FOOD EXPERIENCE





DEVELOPING THE PROPOSITION AND ICONS

National

- Develop our competitive New Zealand food proposition as:

New Fresh (Xin Xian de).

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

Icons

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



LAYERS OF EXPERIENCE FOR FOOD

Food is a multi sensory experience

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

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

Regional opportunity

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

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

IMPLICATION

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



SOCIAL CULTURAL OPPORTUNITY: MAORI

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

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

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

Entertainment

Relevant for some
e.g.: cultural show

Has dramatic entertainment value
Has appeal as a show to some

Overview of ceremonial Māori culture:

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

Substantially misunderstood:

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

Experiential Underpinned by culture

Most relevant
e.g.: kayaking by Maori carving

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

Cultural Lead Activity

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

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



DIGITAL - FAST FACTS

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

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



DIGITAL – FAST FACTS

- **Digital connection is the link to language for Chinese visitors.** They are able to get information, instruction and translation. They rely on it to enable them to travel as FIT relatively easily.
 - They use digital to share. It is relevant for all ages, attitudes and targets.
- **Translated information is critical** to support connection, value and understanding.
- **Geolocation is very important for security and navigation.**
 - Provide precise GPS co-ordinates in addition to addresses to enable navigation.
 - Consider mobile coverage needs in areas with most Chinese visitors → safety, security, sharing, location.
- **Access to Wi-Fi (free) enables sharing** Wi-Fi on site is used for immediate posting and sharing, preferably before they even return to their hotels.
 - We must build access to free Wi-Fi; to support sharing and social media in isolated locations
 - Opportunity to promote NZ Wi-Fi bundles on arrival for a set period (Wi-Fi stick).
- **Chinese Digital infrastructure is key**
 - In China they do not have access to Google, Facebook and YouTube as it is blocked.
 - Opportunity to engage and build presence on Chinese websites, search engines and social media.
 - All tourism businesses targeting Chinese visitors would strongly benefit from a digital development strategy.
- **QR codes are widely used and adopted**
 - QR¹ codes are used short cuts to specific information and connection with businesses and services.
 - QR codes are a mechanism which will increase engagement and facilitate sharing of your contact details to others.

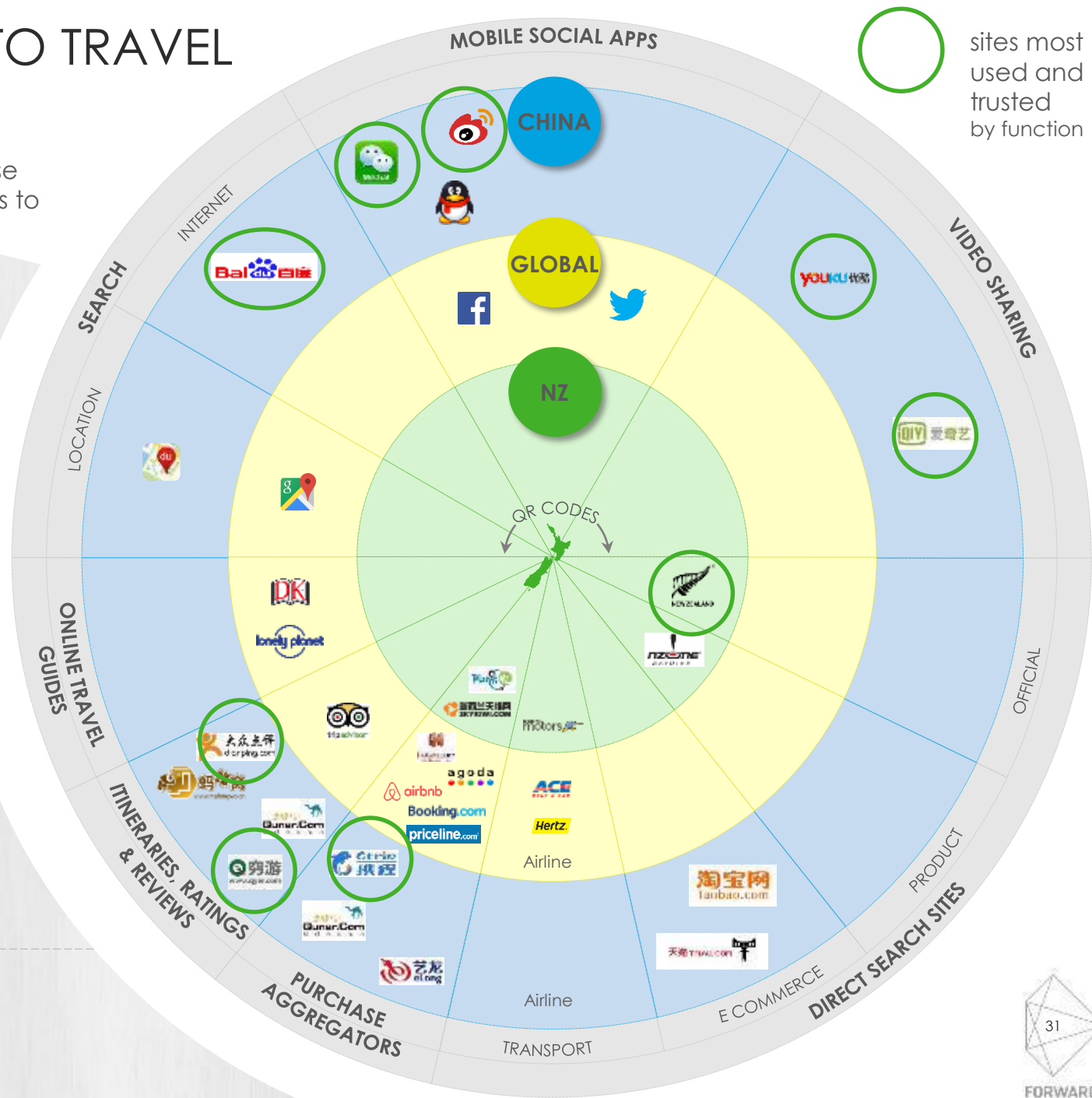
¹A QR Code is a machine-readable code consisting of an array of black and white squares, typically used for storing URLs or other information for reading by the camera on a smartphone.

** source: chinainternetwatch.com JULY 2015

THE JOURNEY TO TRAVEL

DIGITAL

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

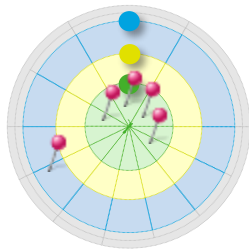


DIGITAL – A PHASED APPROACH



Building and staying connected

1. BE FOUND, BUILD CONNECTIONS & REFERRALS

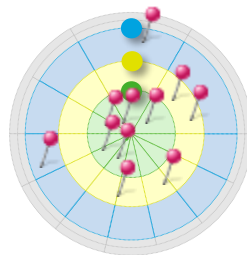


WHAT YOU NEED TO DO

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



2. CHINESE FOCUSED DIGITAL STRATEGY

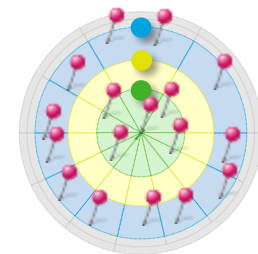


WHAT YOU NEED TO DO

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



3. FULLY INTERATED CHINESE DIGITAL PROGRAM



WHAT YOU NEED TO DO

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



1. Inspiration and discovery

2.Scoping and searching

3.Planning and itinerary building

4. Buying and booking

5. Search buy and book New Zealand

6.Sharing and posting

7.Continue connection

2. Build & develop your unique story and assets

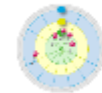


Why
What
How

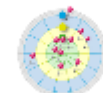
New Zealand
Regional cluster
Region
Product cluster
Product

3. Develop your digital plan to build value

1. BE FOUND, BUILD CONNECTIONS & REFERRALS

[illegible]

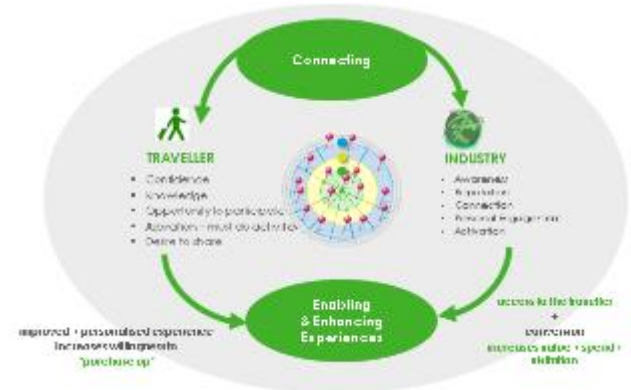
2. CHINESE FOCUSED DIGITAL STRATEGY

[illegible]

5. FULLY INTEGRATED CHINESE DIGITAL PROGRAM



- Enhancing Chinese road digital strategy, social media and program
- Consider Chinese social media countermeasures in business plan
- Consider Web 2.0 social network (Facebook)
- Develop ongoing content for blog, site, FB and video
- Build content, e-learning plan
- Consider social media in business plan
- Make content for e-learning, multimedia and online training and development
- Social media strategy and e-learning



Where do you need to connect

What are you going to say

How do you do it



TOP TIPS FOR CHINA FIT – SUMMER 2016

1. Encourage trade up

Develop a deal for multiple people.
Added purchase – buy 2 experiences + discount.
Make trade up offers and benefits clear.
Offer a personalised option if appropriate OR
Free element (pick up, certificate, cap.....)

2. Warmth matters

Warm water.
Warm food.
A warm welcome.

3. Collect video and photo content over summer

To build web and communications.
Be Interactive.
Be Artistic.
Include your branding wherever possible.

4. Develop a customer database to drive sharing and encourage revisits

Collect email addresses.
WeChat and QQ code addresses.

5. Welcome

A smile is huge, and gets you on the right footing.
Encourage and reassure to break down reticence.
Create an invitation at every opportunity – “Give it a go”.

6. Explain the guidelines ... with respect

Build clarity of expectations.
People want to understand and follow the rules.
If it is important ensure its translated.

7. New Zealand food experiences made easy

Build small sharing plates and platters into your menu.
Simple blackboard graphics of specials is attractive and informative.
Side walk black boards.

8. “Tell me why?”

Why it's unique, special and must do.
What's your signature experience?
Trade up – why.

9. Everything close

Make it hands on.
The local story.
See, do, touch, taste, learn.

10. Encourage sharing

Reward for share.
Offer to take photos of the group.
Encourage reviews Create branded photo opportunities
Provide free Wi-Fi.

11. Have a “wet day” plan and option

There is often limited flexibility so make it work.

- Rain coats, weather gear, hot drinks and umbrellas.
- Alliances with other operators – pass on experience.
- Text alert – still on, options.



VISAS – MULTI ENTRY

Multiple Entry Visas

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

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



THE MULTI ENTRY VISA

THE STOP OVER – FUTURE

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



BIOSECURITY



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



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

Barriers

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

Opportunities

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

