

Developing visitor micro-segments for Dunedin

ENTERPRISE DUNEDIN

TRA

BACKGROUND

Dunedin has aspirations for regional growth, but do not have an in-depth understanding of who their audience is or could be.

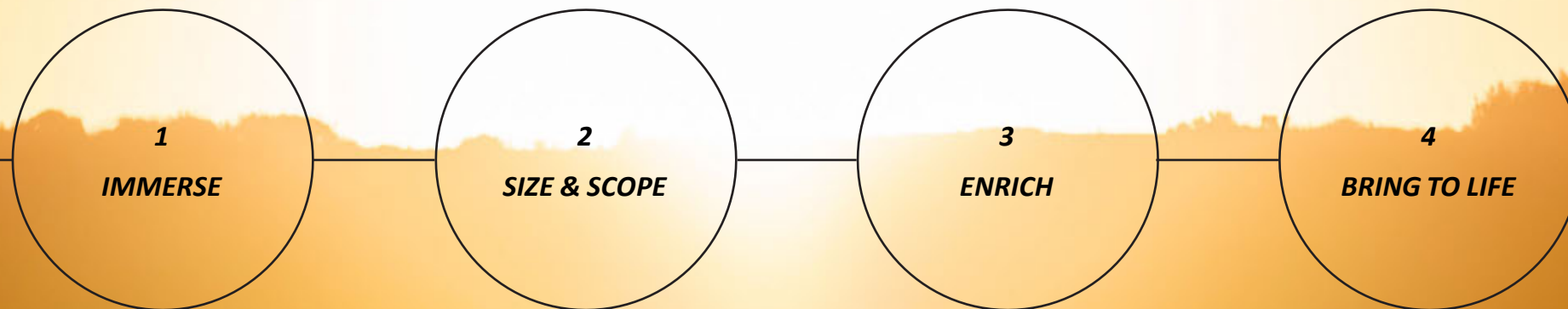
OVERARCHING RESEARCH OBJECTIVE:

Develop personas for current and future domestic visitors, by understanding their behaviours and motivations to visiting Dunedin.

SPECIFICALLY:

1. Provide direction on which audiences Dunedin should prioritise for targeting.
2. Build detailed personas that encompass an understanding of the target market, including their behaviours, drivers and barriers to visiting the region.
3. Identify potential opportunities to maximise connection and relevance between Dunedin and our audience personas. Specifically from a product positioning, community and infrastructure aspect.
4. Prove to both internal and external stakeholders the value of personas in supporting and implementing effective marketing plans.

WHAT WE DID



Stakeholder workshops to review existing hypothesis and leverage the collective wisdom of internal and external regional stakeholders.

Develop the layers of data to form a robust view of our core micro-segments. This will size the respective segments and their priority.

This was done in 2 stages

- Insight Audit of all pre-existing material to identify any gaps for a quantitative survey
- A lean 5-minute quantitative study of n=537 New Zealanders (excluding those who reside in Dunedin) that have either traveled in the last 12 months or are intending to travel in the next 12 months

Fieldwork took place March 8th to 12th 2021

Add in further layers of insight specifically around motivations and activities. This helps understand opportunities around experiences and activities.

- 7x 1-hour Zoom focus groups with our identified micro-segments.

Fieldwork took place April 15th to 22nd 2021

Bring to life the personas in a visual way which will inspire operators and create a common language of the core audience.

Agenda

1

The domestic
travel landscape

2

Identifying a distinctive
platform for Dunedin

3

Activating our
micro-segments



The domestic
travel landscape

TRA

Undoubtedly, Covid changed a lot of things, but Kiwis desire to travel wasn't one of them.

Kiwis see New Zealand as a pretty good place to holiday, and are making the most of it.

Realitive to the rest of the world, Kiwis were out there traveling and exploring our backyard.



% of Kiwi's that have travelled in the last 12 months

% of Kiwi's that intend to travel in the next 12 months

Source: TRA Quantitative Study on Domestic Travel, 2021 Base:
Total sample (n=537)

Last year, we saw Kiwis eagerly respond to the 'Go Local' bids

However, people's frame of local are centred in main city metros, Rotorua, Hamilton and Queenstown



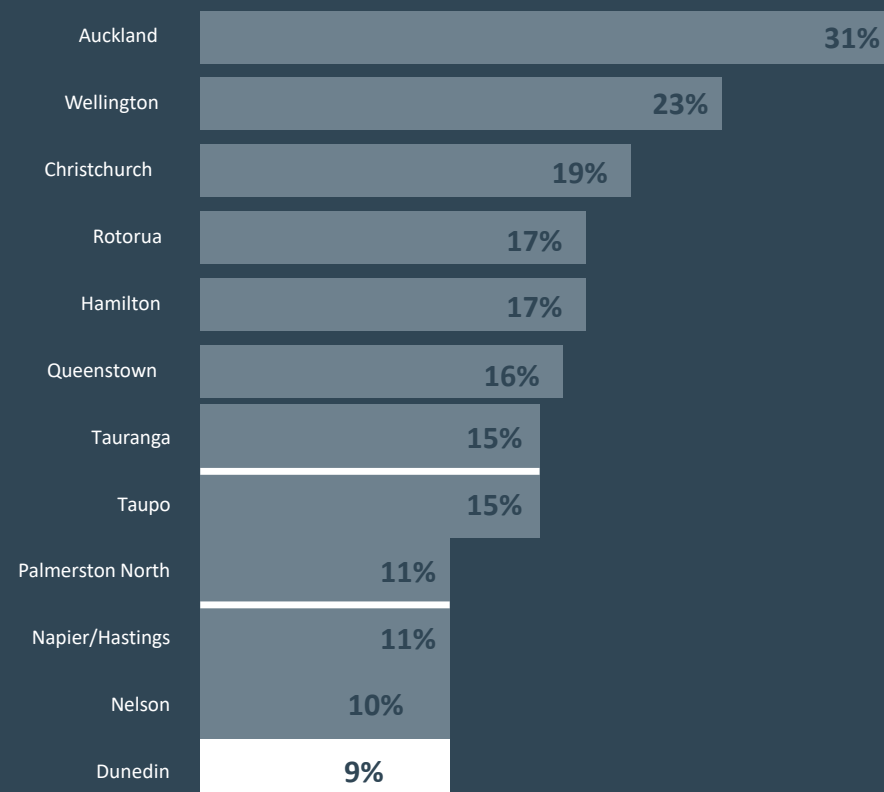
"Travel is about building memories and connection, exploring your own country and appreciating what we have here."

SOUTH ISLAND DISCOVERERS

"I've travelled a bit elsewhere, so now I'm trying to tick off places I haven't been before in New Zealand."

SILVER LEISURE GOERS

You said that in the last 12 months you have travelled around New Zealand, outside of your home town or city. Which of the following places did you go to?



Source: TRA Quantitative Study on Domestic Travel, 2021 Base: Those who have travelled in the last 12 months (n=482)

This year, Kiwis feel a 'duty of care' to explore more of the *real* New Zealand and the *real* people in it.

Kiwis have always felt a sense of discovery, but now it has taken on a new meaning.

- Reinvigoration of Kiwi Pride – team of 5 million, beating Covid
- Discovery driven from deprivation – no where else to go
- Reconsideration of what is important – connection, Kiwiness, localism
- And salience of message – Tourism NZ, Air NZ, Flight Centre

"With the borders closers, you realise how little we really know our own backyard."

SILVER LEISURE GOERS

"As Kiwis, we have a sort of duty of care to see our country, and to know our land and the people in it."

SILVER LEISURE GOERS

IMPLICATION

While hero destinations like Queenstown, aren't off the cards, there is a growing interest in what else is out there.

#DoSomethingNewNewZealand

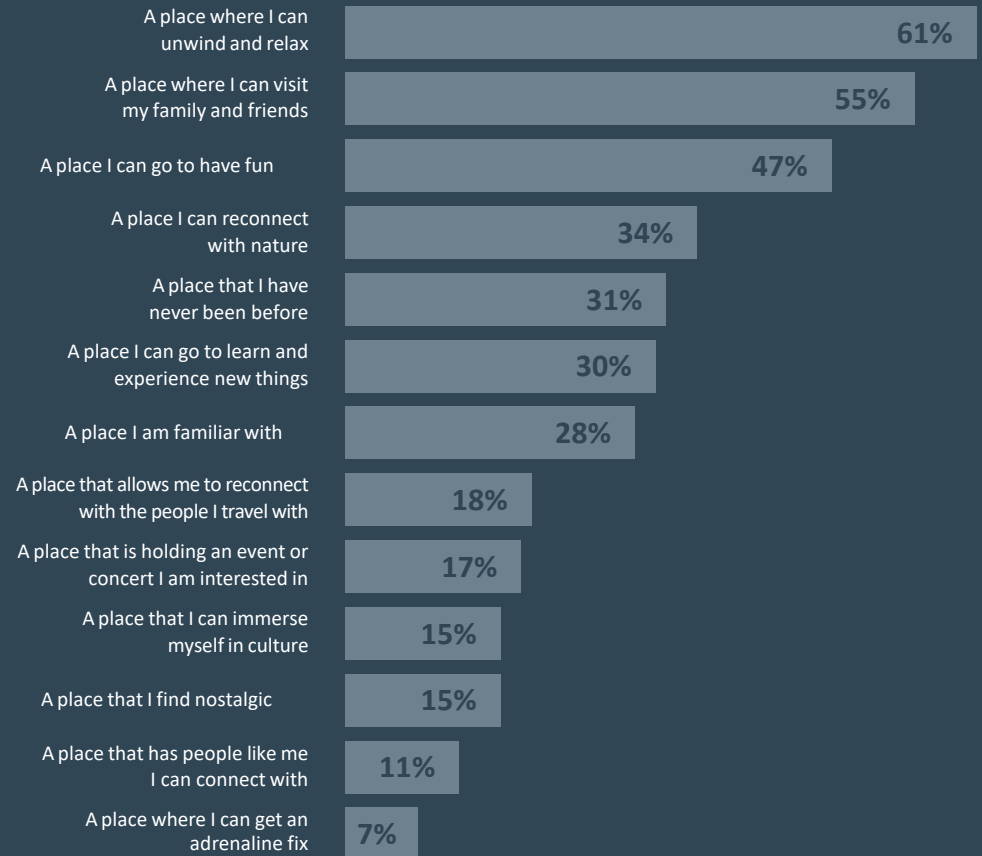


TNZ's "Do Something New New Zealand" was referenced as inspiration for seeing more of our country, and having real, local experiences.

Kiwis feel less of a draw to do touristy adrenaline activities, and instead are looking to see the real NZ in a relaxed way.

With the overseas visitors gone, there is an opportunity for Kiwis to see our own country without the hustle and bustle of traditional tourism.

Which of the following do you look for when deciding on where to travel to domestically?



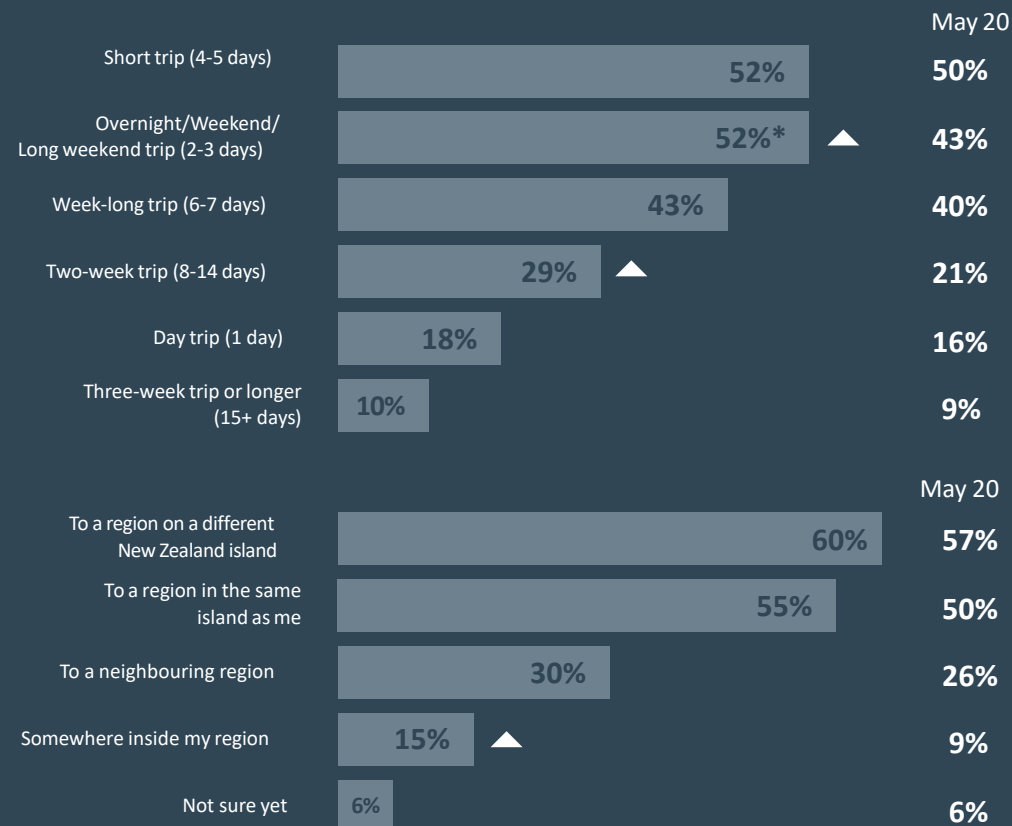
Source: TRA Quantitative Study on Domestic Travel, 2021 Base:
Total Sample (n=537)

And more frequent short holidays enable Kiwis to see the breadth of NZ they are looking for.

Domestic travel is currently driven by short trips (4-5 days) and overnight, weekend trips.

Kiwis are keen to see the other New Zealand Island, and are less interested in travel in their region (although this is increasing)

Where New Zealanders want to travel for a holiday and for how long
(%NZers who will take a domestic holiday in the next 12 months, Sep-Oct 20)



*Driven by 18 to 29 years old group

Source: Kantar Domestic Travel view (Sep-Oct 2020)

▲ ▼ Significantly higher/lower than May-20

IMPLICATION

An increased drive to see the real NZ creates unprecedented opportunity for regions, particularly those that aren't traditional tourist hotspots.

The key is standing out, and making your strengths and unique offerings known to Kiwis.

There is an opportunity to unlock Dunedin's strengths and distinctiveness to power interest in the region.

Some regions are doing this well, and Kiwis had quick top of mind associations with these destinations:

WANAKA	_____	outdoors, relaxation, kids experiences
COROMANDEL	_____	outdoors, beaches, family
WAITANGI	_____	culture
TAUPO TARANKAI	_____	adventure, outdoors, culture & heritage
RUSSELL	_____	outdoors
MARLBOROUGH	_____	culture
DUNEDIN	_____	connectedness, relaxation
	_____	?

Identifying a distinctive platform for Dunedin

2

TRA

Currently Dunedin is widely unknown and not on Kiwi's travel radars.

Kiwis lack awareness of the region, relative to other locations.

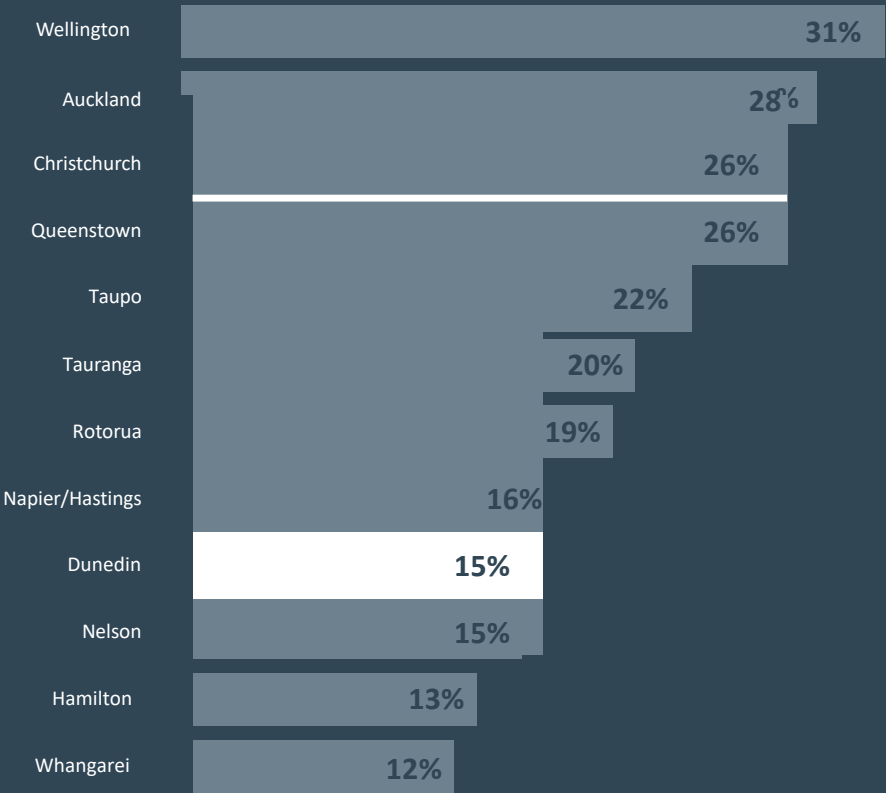
“Dunedin flies under the radar, you forget it’s there.”

SILVER LEISURE GOERS

“You never hear anything about Dunedin. I don’t think I’ve ever been advertised to by Dunedin.”

DRIVE IN ENTERTAINED

You said that you intend to travel around New Zealand outside of your home town or city in the next 12 months. Which of the following places would you consider visiting?



Source: TRA Quantitative Study on Domestic Travel, 2021
Base: Those intending to travel in the next 12 months (n=488)

And at a push, Dunedin has associations of cold, small and full of troublesome ‘scarfies.’

BARRIERS TO VISITING DUNEDIN:

SMALL

Physical city size creating a feeling that there isn't much to do.

"I'd go to Dunedin, but I don't know why I'd go there, because I don't know if there is much to do there."

SOUTH ISLAND DISCOVERERS

COLD

Cold is more than weather, it is the dark, dreary vibe that pervades the city. Supports the perception that there won't be much to do.

"Dunedin is a dark, cold city – it needs a bit of a rejuvenation, I feel wary of going around a dark corner."

MIGRANT EXPLORERS

SCARFIES

Seen to be partiers, causing trouble. Creates a perception that Dunedin lacks wide relevance, and isn't family-friendly.

"There are some streets where the students are and you smell weed and it's a bit dirty and trashy."

MIGRANT EXPLORERS



TRA

But, given a frame and understanding, these barriers can be unique and engaging

SMALL —————→ ***ACCESSIBLE ACTIVITIES***

COLD —————→ ***UNTAPPED WARMTH***

SCARFIES —————→ ***COLLIDING CULTURES***

Leaning into Dunedin's accessible size can show Kiwis that they can do more with less.

SMALL —————→ ACCESSIBLE ACTIVITIES

"There isn't much to do"

Dunedin's small size enables people to see and do more on their holidays, and supports the idea that Dunedin is an opportunity to experience local – not a flashy, expensive destination.

Outdoors 'Lite' – the ability to do the outdoors but come back and experience urban life: Enables people to do more and experience the variety that Dunedin has.

Accessible – easy to get around, people can experience Dunedin's variety on foot. Removes the barrier of needing to get rental vehicles.

Local – Being a smaller city, Dunedin is seen as less flashy and less expensive – We know that getting to Dunedin can already be a barrier with its geographic location, so knowing that it is priced for the locals can support Kiwi's desire for 'real.'



Accessibility, however, needs to be balanced with variety, and showing people that Dunedin has enough to do.

TRA

There is a real opportunity to embrace Dunedin's cold, and flip it from a deterrent to a drawcard.

COLD

→ UNTAPPED WARMTH

Dreary, grey vibe and feeling that there isn't much to do in bad weather.

Dunedin has a lot of warmth – from the cosy pubs and restaurants, to the charming students and people in Dunedin – this warmth needs to be made forefront to offset perceptions of it being a cold, dreary town.

There is an opportunity to reframe the cold to be romantic – Queenstown has made its cold desirable, by framing it as a winter wonderland. Dunedin's cold can be cosy and snug – like a “quaint European city.”

“Queenstown seems to have leveraged the cold into a positive. With Dunedin, I think of raining, whereas I think how romantic would it be if you were in Queenstown and it was raining. It makes Dunedin feel a bit sad, whereas you could be in Queenstown even if it was -50 degrees.”

BUSINESS TRAVELLERS

North Island cold is different to South Island cold, and there is an opportunity to attract both.

North Islanders view cold as romantic and exciting, whereas South Islanders see cold as a hinderance.

NORTH ISLAND COLD

For North Islanders in particular, the cold is exciting, when framed like it is in Queenstown..

Cold can be...

Romantic

Exciting

Winter wonderland

An escape

SOUTH ISLAND COLD

For South Islanders, who are used to cold weather, leaning into Dunedin's warmth can be appealing

Cold is currently seen as...

Dreary

Wet

Gross

There is an opportunity to reframe cold to be:

Cosy

Charming

Quaint

'Fire places & mulled wine'

To widen Dunedin's relevance, we should reframe 'Scarfies' as Students, and beyond that, we should showcase the other people of Dunedin.

By doing this, we can also showcase how the students play into Dunedin's unique make up of colliding cultures.

SCARFIES —————→ COLLIDING CULTURES

"Dunedin isn't relevant to me or families"

Reframe 'scarfies' as students – Students' have more positive associations of innovation, progressiveness, and charm...

Highlight the colliding cultures in Dunedin – Students are often seen as a culture of their own, but there is an opportunity to showcase how students sit nicely alongside a melting pot of other cultures. This will help in widening the city's relevance.



Reframing these barriers will give us an edge, but in isolation, isn't enough...

We need a compelling proposition to put Dunedin in the hearts and minds of Kiwis.



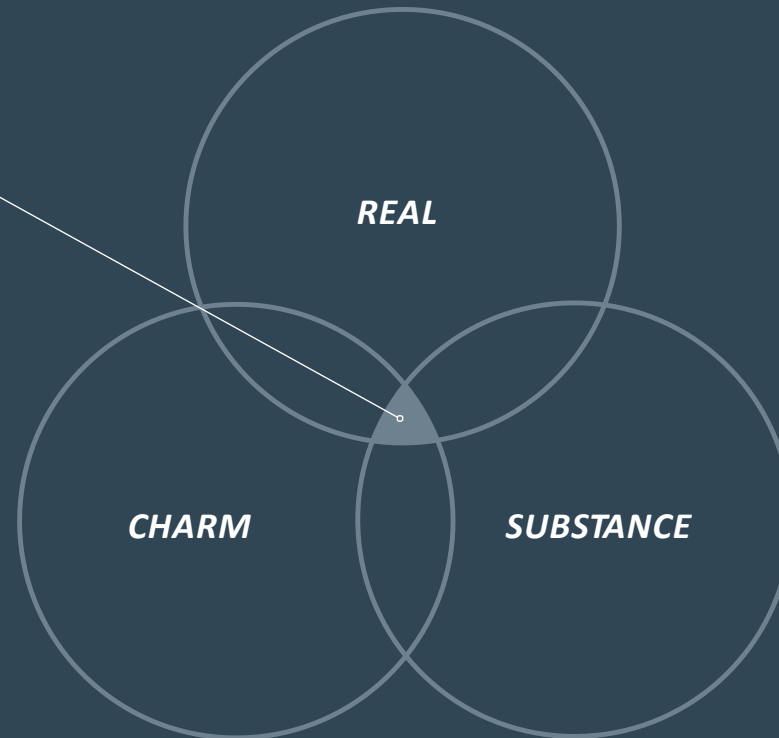
Thinking about what Kiwis are looking for from travel, and what Dunedin has to offer, we see a unique intersection of opportunity

An internal positioning comes from these three elements.

DUNEDIN POSITIONING

Charm accentuates Dunedin's warm and cosy environment, the quirks of the city's colliding cultures.

Overcomes barrier that Dunedin is a cold city full of students.



Real Addresses people's desire for understanding the *real* NZ and the real people from many cultures in it.

Reduces barrier that Dunedin is only a student town.

Substance assures people that Dunedin has variety of activities and lots to see and do.

Overcomes barrier that Dunedin is small and doesn't have much to do.

We see this combination of real, charm and substance as differentiating, enabling Dunedin the ability to *stand out and stand on its own two feet...*



TRA

Beyond standing out amongst the regions, this positioning will release Dunedin from the shadows of Queenstown, and ultimately give us permission to *wholeheartedly embrace not being Queenstown.*

Dunedin has strengths where Queenstown has drawbacks, and the tone of the two cities is almost opposite – we can play this up to further differentiate ourselves.

QUEENSTOWN

Flashy, touristy

Pay for what you get, and largely it is expensive Lots

to do, but orchestrated experience

DUNEDIN

Local, real, not trying to be something else

‘Normal life’ prices

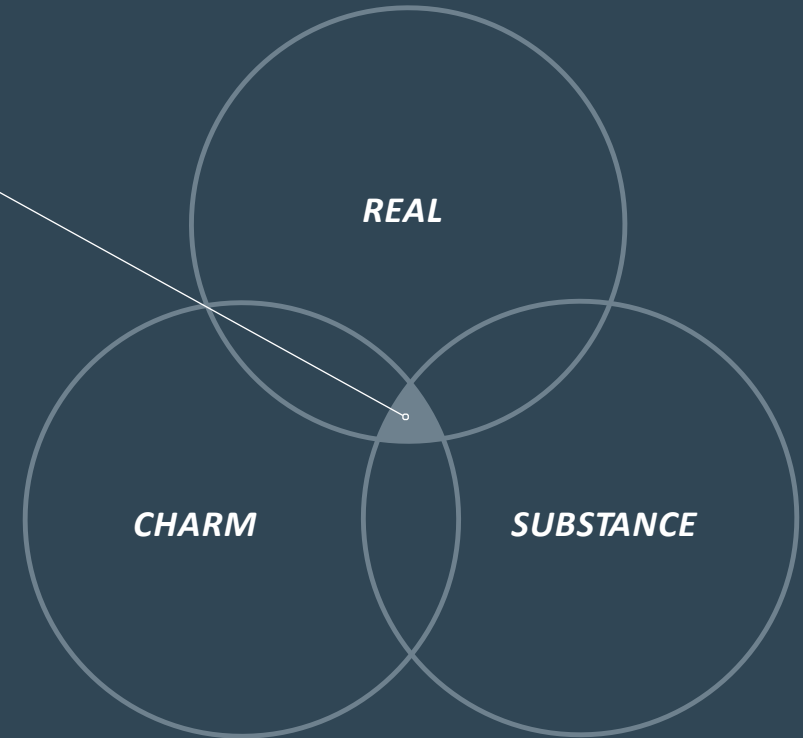
Variety of activities with distinct equity in wildlife, culture and heritage

Now that we know the elements of how Dunedin can stand out and be relevant to Kiwis, what is our positioning statement?

A positioning statement is an internal rally – something to base communications around, but not necessarily a tagline or something external facing.

A strong, unique, ownable positioning for Dunedin will reflect all three of these core elements.

DUNEDIN POSITIONING



A Cosy City Full of Untapped Wonder



INTERNAL POSITIONING SPACE

Warmth, emotional meaning of
cosy, leans into accessibility

Balances perceptions of
'too small'

Substance, enough to do.

A Cosy City Full of Untapped Wonder

Promotes sense of discovery,
doing something new and real

Charm, edgy intrigue,
local experience

We see this positioning complementing your existing distinctive brand identity, with a few executional tweaks

FROM:

Raw, dark, gothic



TO:

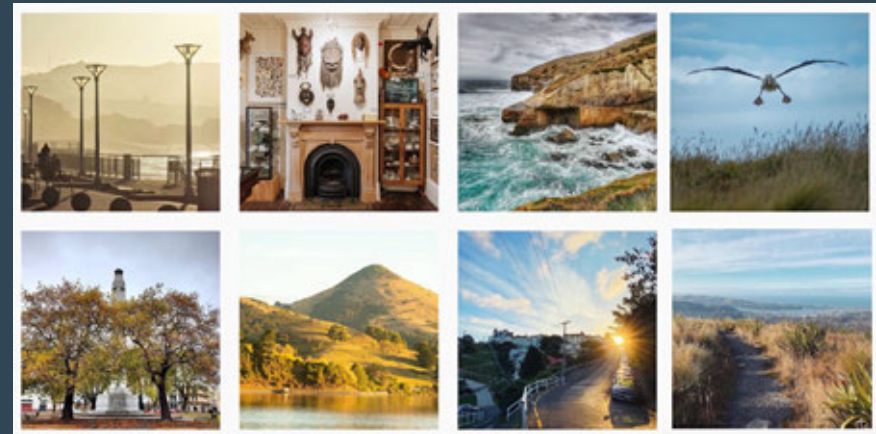
Inviting, real, full of substance while still being distinctively Dunedin amplified by...

Warm tone: warm imagery, colour pallet to balance gothic branding

Real Experiences: Continue showcasing Dunedin's raw, authentic experiences

Charm through People: More people in images – show colliding cultures

Substance: showcase the variety of activities Dunedin has, while specifically building equity in heritage, wildlife and culture.



+ Images of people from different cultures + cozy pubs

IMPLICATION

We have a clear way to make Dunedin stand out to Kiwis.

- At present, Dunedin is not well known and has barriers to visitation
- Reframing these barriers will help; but a distinct brand positioning will put Dunedin in the hearts and minds of Kiwis.
- A positioning based in real x charm x substance allows us to tout our strengths, and differentiates Dunedin as a region from the rest of NZ.
- More importantly, it differentiates us from Queenstown, and gives us permission to have the confidence to proudly not be Queenstown.



TRA



3

Activating our
micro-segments

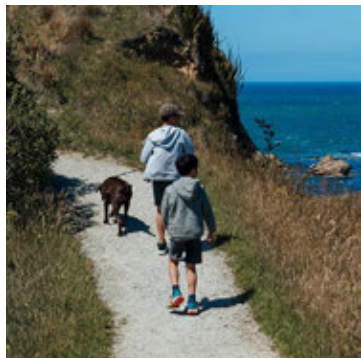
TRA

WE KNOW HOW TO STAND OUT TO KIWIS...

Now the job is to prioritise the 'lowest hanging fruit' and determine the micro-segments who will easiest for Dunedin to target.

Having an overarching proposition can widen Dunedin's relevance, but there is a need to know exactly who Dunedin should be talking to. Knowing this will make spend more efficient and effective.

Within the New Zealand travel market, there are 5 key macro- segments.



Nature & Culture Immersers

Looking to immerse in nature and culture experiences



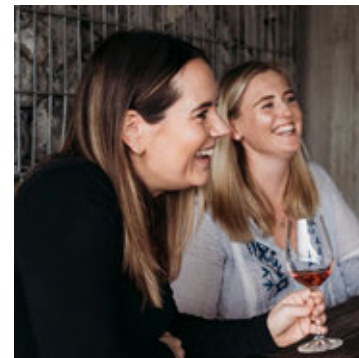
Experience seekers

Open to and looking for a variety of experiences, with the **exception** of extreme / adrenaline activities



Hardcore experience seekers

Open to and looking for a variety of experiences, **including** extreme/ adrenaline activities



Entertained Connectors

Looking for an urban backdrop for them to connect with friends and family



Occasionists

Travelling for a specific purpose or event

Let's understand these segments at deeper level...

Nature & Culture Immersers

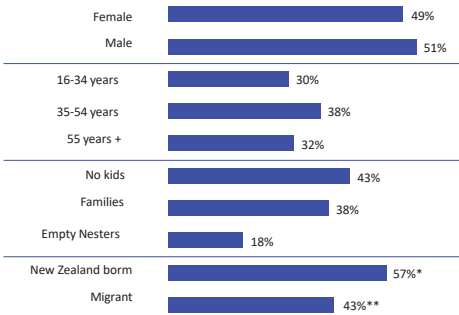
20% of the Domestic NZ Travellers

Nature and Culture Immersers travel to New Zealand destinations to immerse themselves in scenery and natural beauty. Being in nature allows them to re-connect with the land, and re-charge.

They have a natural drive to make the most of a place – and are often found soaking up scenic offerings and embracing the cultural and historic elements to a place. Doing this provides them with the emotional satisfaction that they have understood a bit of New Zealand more, and have had an authentic experience.

DEMOGRAPHICS

Who are they?



LOCATION AND ACCESS

Where are they coming from?

North Island

HOW WOULD THEY GET TO DUNEDIN?



More likely to fly to us, although 39% lie out of reach – meaning >1 flight

We know that >1 flight is a barrier to getting to the region, so it might not be worth the efforts to get Other North Islanders as they're likely to be out of reach of Dunedin.

Therefore, focus on Auckland based Natural Localists. Auckland is a fly-zone, and a 36% of Natural Localists are coming from here.

TRAVEL BEHAVIOUR

Top three motivations for travel:

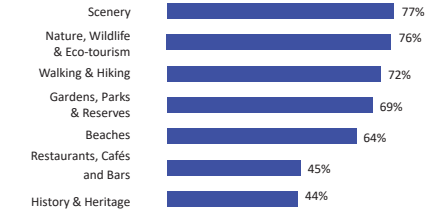
- A place where I can unwind and relax (78%)
- A place where I can connect with nature (73%)
- A place I can go to have fun (62%)



More likely to be 4-star spenders:

- Accommodation (52%)
- Events & Activities (50%)
- Food and drink (60%)

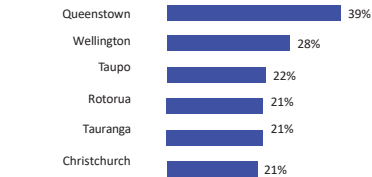
WHAT ARE THEY LOOKING FOR IN A TRIP



What are the destinations on their mind?

Visited **3.3** locations last year
Considering **3.7** locations next year

What are they looking for in a trip:



CONSIDERATIONS FOR DUNEDIN

15% actively considering Dunedin
– Ranked 10th out of 32 destinations

Those who have been to Dunedin...

Typically travelled with: **Partner**
Typically went for: **2-3 days**

Dunedin attractiveness:



Not considering too many places; and **15%** are already actively considering Dunedin.

Dunedin has built equity in Wildlife, Culture & Heritage

MICRO-SEGMENTS WHERE THERE IS OPPORTUNITY:

Outdoor Enthusiasts:

NZ born, Nature & Culture Immersers

Migrant Explorers:

Migrants, Nature & Culture Immersers

*Under-indexes
**Over-indexes

MICRO SEGMENT

Outdoor Enthusiasts

11% of traveller market

Nature & Culture Immersers



Outdoor Enthusiasts

KEY DEMOGRAPHICS

NZ Born

Likely to be in Auckland & Other North Island

WHO ARE THEY?

Outdoor Enthusiasts are keen to see their backyard, and travel to spend time outdoors with those they are close with. They value New Zealand’s unique environment for its ability to allow them to unwind, destress, and give them perspective from their busy lives. They usually travel to places nearby, as it allows them the frequency of nature/ outdoor experience they crave. When they go out of their way to fly to destination, they value places where they can do nature-based activities, as well as experience other local urban offerings. Their ideal place would be somewhere where they can go on a hike, explore a nature sanctuary, go to the beach, and then after a big day of being outside, have a nice meal. Accommodation is also important to them, as they want to feel comfortable after their exploring.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Ability to do something new
- ✓ Wildlife capital of NZ
- ✓ Local experience, urban offerings
- ✓ Reframing cold to be suitable for exploring
- ✓ Affordability
- ✓ Comfortable accommodation

Dial down:

- ✗ Cost & logistics of getting to Dunedin

Dunedin ‘Hero’ destinations:

- Wildlife & outdoors – penguins and Albatross centre, tunnel beach, Southern Lights
- Culture & heritage – Cargills castle
- Chinese Gardens, Taieri Gorge Railway

Where do we target them?

- Instagram, social media
- NZ books, NZ history books

“You want to go somewhere and experience the ocean, the mountains... if you could do something really cool and climb it, or do something sporty, that would be great. Then go do something relaxing and explore the local places. A good holiday has it all.”

MICRO SEGMENT

Migrant Explorers

9% of traveller market



Nature & Culture Immersers



Migrant Explorers

KEY DEMOGRAPHICS

Migrants

Likely to be in Auckland

Migrant Explorers are keen to get out and see New Zealand – whether they have called NZ home for years or decades. They feel a duty to this country to understand it better, and feel even more appreciation for being here each time they visit somewhere new. Because they want to see and do so much, they are relatively price sensitive, and enjoy going to places that are accessible both to get to and when they are there. They tend to go on holidays that are rooted in the outdoors, as New Zealand’s natural scenery is often a contrast to their home countries, and it enables them to be fulfilled with activities without spending too much money. When deciding where to holiday, they want to know there are free activities, activities rooted in NZ’s heritage and history, and a place with a variety of options so that they can fit in as much as possible in each holiday.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Local experience, real NZ, everyday life
- ✓ Reframing cold
- ✓ Nature, wildlife, landscape
- ✓ History & heritage to the region
- ✓ Affordability, free activities
- ✓ Safe, uncrowded
- ✓ Consider bundling activities

Dial down:

- ✗ Cold weather without a positive frame
- ✗ Location barriers, >1 flight
- ✗ Accommodation – less of a big deal

Dunedin ‘Hero’ destinations:

- Wildlife & outdoors – penguins and Albatross centre, tunnel beach, Southern Lights
- Culture & heritage – Cargills castle
- Local experience – Otago farmers market, ID fashion week, craft beer scene and festival

Where do we target them?

- Social media, hook them with images / videos of the destination
- Reviews
- Migrant community – they learn a lot from friends/ family

“I still feel like a tourist. Everything is new – the food, the landscapes, the accents.”

Entertained Connectors

22% of the Domestic NZ Travellers

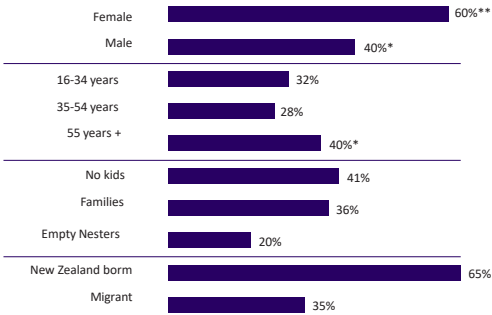
Entertained Connectors travel to spend time with others. When making travel decisions, the people come first, and the destination is more of a backdrop to spending time and connecting with others.

However, while it might not be the first thing on their mind, they are looking for a place that will compliment their ability to connect with others. Specifically, a destination that has good restaurants, bars, shopping and beaches enables them experiences to enjoy with others.



DEMOGRAPHICS

Who are they?



LOCATION AND ACCESS

Where are they coming from?

South Island

HOW WOULD THEY GET TO DUNEDIN?



Larger portion willing to drive to us, although 39% lie out of reach – meaning >1 flight

The drive market is a low-hanging fruit, as qualitatively, we know that people who are in the drive region, aren't too bothered by the drive to Dunedin. This segment has the highest percentage of drivers compared to others, so there is an opportunity here.

TRAVEL BEHAVIOUR

Top three motivations for travel:

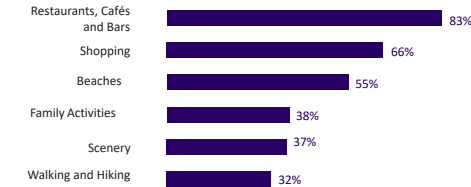
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More likely to be 4-star spenders:

- Accommodation (62%)
- Events & Activities (53%)
- Food and drink (60%)
- Shopping (53%)

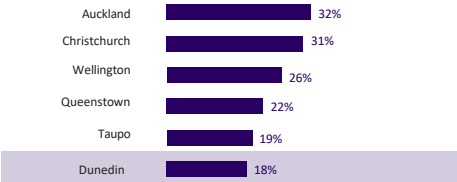
WHAT ARE THEY LOOKING FOR IN A TRIP



What are the destinations on their mind?

Visited **3.3** locations last year
Considering **3.7** locations next year

What are they looking for in a trip:



CONSIDERATIONS FOR DUNEDIN

15% actively considering Dunedin – Ranked 6th out of 32 destinations

Those who have been to Dunedin...

Typically travelled with: Typically went for:

Partner
Friends

2-3 days

Dunedin attractiveness:



- Dunedin is in their top 5 destinations they are considering.
- Dunedin can cater to the things they are looking for in a trip.
- Location barriers – Compared to other segments, Entertained Connectors can drive to Dunedin, removing the >1 barrier.

MICRO-SEGMENTS WHERE THERE IS OPPORTUNITY:

Drive In Entertained
Other South Island, Drive Market

South Island Discoverers
North Island, Easy Fly Zone

*Under-indexes
**Over-indexes

MICRO SEGMENT

Drive In Entertained

5% of traveller market

Entertained Connectors



Drive In Entertained

KEY DEMOGRAPHICS

Drive Market

Other South Island

WHO ARE THEY?

Drive In Entertained are keen to have unique experiences, and concerts and events are their gateway of doing so, and seeing more of New Zealand. They will go to destinations for an experience or event, but will stay to spend time with their friends in an unique setting, and experience the local offerings. For some Drive In Entertained people, just knowing that there are friendly locals in a destination who they can connect with, is enough. As they often spend a lot of money on the event they are going to, they are looking for affordability in the other aspects of their trip. On the whole, they are more drawn to urban activities, but the ability to get into the outdoors makes them feel healthier and gives their trip balance.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Concerts, events
- ✓ Lots to do, variety of activities
- ✓ Good affordable food and drink options
- ✓ Outdoors Lite
- ✓ Friendly city, friendly people
- ✓ Comfortable accommodation
- ✓ Consider bundles with events

Dial down:

- ✗ Costs
- ✗ Cold, unless reframed with warmth

Dunedin ‘Hero’ destinations:

- Concerts, festivals, events, stadium
- Dunedin hospitality – food scene, music scene
- Culture & Heritage activities: Larnach Castle, Chinese Gardens, Taieri Gorge Railway

Where do we target them?

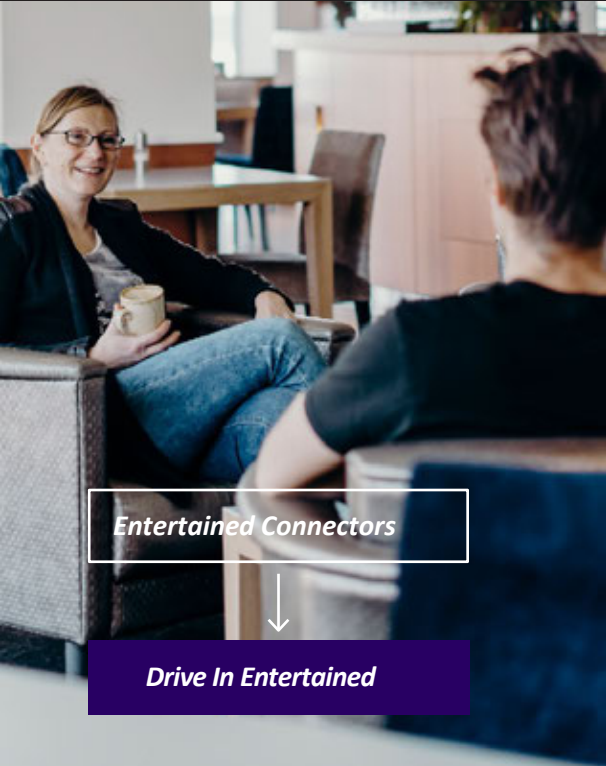
- Google search
- Events pages
- Social media – often where they go to learn about events
- Tourism ads

“Dunedin has a hell of a lot more than what we know about it. A lot of hidden treasures. I wish I knew more about the other things to do here last time I visited.”

MICRO SEGMENT

South Island Discoverers

8% of traveller market



Entertained Connectors



Drive In Entertained

KEY DEMOGRAPHICS

Fly Zone
North Island

WHO ARE THEY?

South Island Discoverers are people based in the North Island who are looking to see more of New Zealand, and specifically the South Island. As they are getting on a plane for their holiday, they want to maximise their trip and see and do as much as possible. They need to know that the places they are going to visit will have enough to do, and will enable them to have a comfortable experience with friends and family. Accommodation is really important to them, although they hardly see themselves spending time there, as they'll be maximising their experience. They also are more likely to go to Dunedin as part of a wider trip to see the region – Christchurch, Timaru, Oamaru, Dunedin and Catlins. There is an opportunity to market Dunedin as the Gateway to the South, to attract the South Island Discoverers.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Gateway to the South
- ✓ Lots to do, lots of choice, variety of activities, consider bundles
- ✓ Cosiness of city
- ✓ Outdoors Lite
- ✓ Accommodation options
- ✓ Show family friend experiences
- ✓ Free activities
- ✓ Cheap airfares to get them there

Dial down:

- ✗ Cold, unless reframed with warmth

Dunedin 'Hero' destinations:

- Wildlife & outdoors- Penguins, Albatross center , tunnel beach,
- Culture & Heritage activities: Larnach Castle, heritage buildings, Scottish heritage, Chinese Gardens, Taieri Gorge Railway, Otago Museum
- Local experience – St Clairs Beach

Where do we target them?

- Air NZ, travel booking
- TV
- Tourism ads
- Google search

“A trip would have to include as much as possible- it wouldn't just be a relaxation trip, we'd try to do as much as we can. Wherever we go, we try to experience lots of things – earing out, doing something local, being with family.”

Experience Seeker

18% of the Domestic NZ Travellers

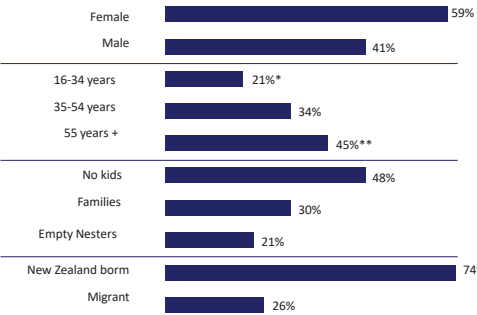
Experience Seekers are domestic travelers who want to do and see a lot of things on their trips – they’re always looking for their next experience, and something new. They see now as the perfect time to make the most of New Zealand. They are traveling more than most, and are keen on many locations across the country, making it hard for them to decide where to go. This group skews older, so while they pack a lot into their holidays and are seeking new experiences, adrenaline and extreme activities are off the cards.

They are essentially, an older version of the ‘Hardcore Experience Seekers.’



DEMOGRAPHICS

Who are they?



LOCATION AND ACCESS

Where are they coming from?

North Island with the exception of Wellington and Auckland**

HOW WOULD THEY GET TO DUNEDIN?

Drive Fly

More likely to fly to us, although 54% lie out of reach – meaning >1 flight

We know that >1 flight is a barrier to getting to the region, so it might not be worth the efforts to get Other North Islanders as they’re likely to be out of reach of Dunedin.

Consider bundling package with other nearby areas to attract them – Dunedin as the "Gateway to the South".

TRAVEL BEHAVIOUR

Top three motivations for travel:

- A place where I can unwind and relax (80%)
- A place where I can visit my family and friends (68%)
- I place I can go to learn and experience new things (67%)



More likely to be 4-star spenders:

- Accommodation (50%)
- Events & Activities (57%)
- Food and drink (60%)
- Shopping (56%)

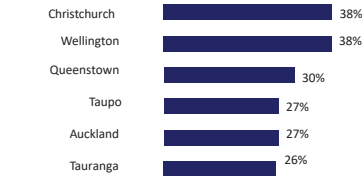
WHAT ARE THEY LOOKING FOR IN A TRIP



What are the destinations on their mind?

Visited **4.3** locations last year
Considering **5.5** locations next year

What are they looking for in a trip:



CONSIDERATIONS FOR DUNEDIN

17% actively considering Dunedin – Ranked 11th out of 32 destinations

Those who have been to Dunedin...

Typically travelled with:

Partner

Typically went for:

2-3 days

Dunedin attractiveness:



- Considering a lot of locations, but 17% are actively considering Dunedin.
- Dunedin can deliver on what they are looking for.
- Location barriers – Dunedin is harder to get to for them as they need to take >1 flight.

MICRO-SEGMENTS WHERE THERE IS OPPORTUNITY:

Silver Leisure-Goers
55+, Other North Islanders

School Holidaymakers
Have families

*Under-indexes
**Over-indexes

MICRO SEGMENT

Silver Leisure-Goers

8% of traveller market

KEY DEMOGRAPHICS

55+

Non-Metro, Other North Island

WHO ARE THEY?

Silver Lesiure- Goers are keen to travel to feel young again, create new memories to share with their families, and to see parts of New Zealand that they haven’t yet experienced. They often have to travel far to get to Dunedin, as they are mostly located in ‘Non-Metro, Other North Island,’ so are looking to make the most of their trip. They value having an experience that couldn’t be recreated – they want to meet real people, live like locals, and spend time with the makers and creators. They want to take stories home. They aren’t interested in crowded touristy areas, but they do want to keep interested and busy throughout the day. Largely their interests revolve around culture and heritage. They think the little things make or break a trip, so good accommodation and food and drink options are important to them.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Relaxed, not crowded
- ✓ Genuine, authentic local experiences
- ✓ History, heritage
- ✓ Interesting oddities
- ✓ Meet the makers
- ✓ Intrigue
- ✓ Accessibility
- ✓ Comfortable accommodation

Dial down:

- ✗ Cold, unless reframed with warmth
- ✗ Physical and financial restraints

Dunedin ‘Hero’ destinations:

- Wildlife & outdoors- Penguins, Albatross center , tunnel beach, Southern Lights
- Culture & Heritage activities: Larnach Castle, heritage buildings, Chinese Gardens, Scottish heritage, Taieri Gorge Railway, Otago Museum, University of Otago
- Local experience – St Clairs Beach, café scene, music scene

Where do we target them?

- Google search
- Tour reviews
- Herald/ Stuff travel supplements
- Word of mouth -reviews

“We travel to take a bit of the area back home and create an emotional connection. It makes the area become more real.”

Experience Seekers



Silver Leisure-Goers

MICRO SEGMENT

School Holidaymakers

5% of traveller market



Experience Seekers



Drive In Entertained

KEY DEMOGRAPHICS

Families

WHO ARE THEY?

School Holidaymakers travel to spend time with each other in a new, unique, location. Family is the key word for this group, as every decision they make needs to keep their families needs in mind, particularly when they have young children. Their parenting duties don’t go away on holiday, and as a result, they feel like they can only feasibly do 40% of the activities on offer, as their brains are constantly mulling over all how each factor of an experience would impact their kids. As a default, School Holidaymakers tend to focus on free activities in a destination, as they see traveling with their families to be expensive. Finding stuff that the whole family can do is also seen as a challenge. Activities, however need to be balanced with accessibility and the ability to have down-time. Accommodation is also key, and thought of as a tool to help them have a better experience while away from home – if the hotel has a pool, the kids can be entertained, and the parents can have a moment to themselves.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Accessibility, easy to get around.
- ✓ Activities for the kids
- ✓ Free activities
- ✓ Comfortable accommodation
- ✓ Something for the whole family

Dial down:

- ✗ Cold – cold is hard for children
- ✗ Costs
- ✗ Students / scarfies

Dunedin ‘Hero’ destinations:

- Wildlife & outdoors- Penguins, Albatross center , tunnel beach,
- Southern Lights
- Culture & Heritage activities: Larnach Castle, heritage buildings, Chinese Gardens, Taieri Gorge Railway, Otago Museum, University of Otago,
- Local experience – St Clairs Beach

Where do we target them?

- Google search
- Family blogs
- Social media - Facebook
- Word of mouth- reviews

“We have to always think about the kids. How will we keep them entertained? How long for? What can we do to keep them off devices? Will they want to walk that far? What will we eat for dinner? You’re on holiday but you’re still doing full on parenting duty until bedtime.”

MICRO SEGMENT

School Holidaymakers

5% of traveller market



Experience Seekers



Drive In Entertained

IMPLICATION FOR DUNEDIN

Reaching families is a challenge, and will be particularly hard for Dunedin as the city has natural barriers to consider –For families with older children, there is a potential for Dunedin to be relevant, but this is only likely to happen when barriers have been overcome and reframed.

BARRIERS WITH REACHING FAMILIES

- ✗ Accessibility to Dunedin – traveling with kids, >1 flight for some
- ✗ Accessibility within Dunedin – seeing the city on foot with their kids can be challenging, they want free activities to be within close proximity to their accommodation so they can rest and recharge frequently.
- ✗ Cold weather – can limit perceived options on things to do, children get uncomfortable in cold
- ✗ Accommodation – they largely look for accommodation that enables them space and at best, a pool for kids entertainment.
- ✗ Scarfies – they currently see Dunedin to be full of troublesome students – this makes the city feel less relevant to families
- ✗ Enough for the whole family – Activities that will satisfy all family member’s needs

OPPORTUNITIES TO REFRAME BARRIERS

- ✓ Cold weather – highlight the indoor, free activities on offer within Dunedin
- ✓ Accommodation – showcase how accommodation offerings are family-friendly
- ✓ Scarfies – As students – and show families that their ‘headquarters’ is away from the rest of Dunedin, and that there are more than just students in Dunedin.
- ✓ Enough for the whole family – Activities for adults to do at night once kids have gone to bed, free activities for families during the day.

Hardcore Experience Seeker

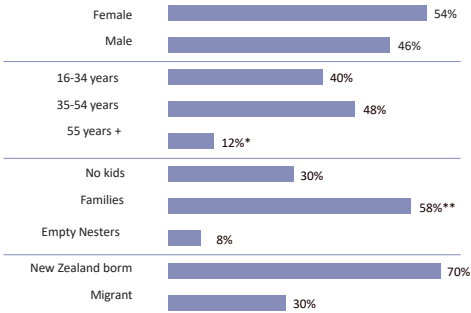
9% of the Domestic NZ Travellers

Hardcore Experience Seekers are domestic travelers who want to do and see a lot of things on their trips – they’re always looking for their next experience, and something new. They see now as the perfect time to make the most of New Zealand. They are traveling more than most, and are keen on many locations across the country, making it hard for them to decide where to go.

Unlike the Experience Seekers group, Hardcore Experience Seekers are open to adrenaline and extreme activities. It isn’t necessarily a focus for all of their trips, but they uniquely have the openness to it.

DEMOGRAPHICS

Who are they?



LOCATION AND ACCESS

Where are they coming from?

North Island with the exception of Wellington

HOW WOULD THEY GET TO DUNEDIN?



More likely to fly to us, although 42% likely out of reach – meaning >1 flight

We know that >1 flight is a barrier to getting to the region, so it might not be worth the efforts to get Other North Islanders as they’re likely to be out of reach of Dunedin.

TRAVEL BEHAVIOUR

Top three motivations for travel:

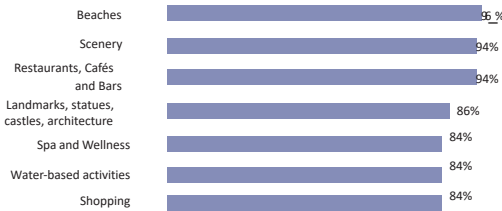
- A place where I can unwind and relax (86%)
- A place I can go to have fun (80%)
- I place I can go to learn and experience new things (68%)



More likely to be 4-star spenders:

- Accommodation (60%)
- Events & Activities (54%)
- Food and drink (58%)
- Shopping (56%)

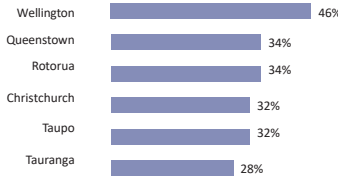
WHAT ARE THEY LOOKING FOR IN A TRIP



What are the destinations on their mind?

Visited **3.3** locations last year
Considering **3.7** locations next year

What are they looking for in a trip:



CONSIDERATIONS FOR DUNEDIN

26% actively considering Dunedin – Ranked 8th out of 32 destinations

Sample size too small to get Dunedin specific travel behaviour

Dunedin attractiveness:



- 26% of Hardcore Experience Seekers are actively considering Dunedin, however they are also considering lots of destinations.
- While Dunedin can deliver on things they are looking for, Dunedin can’t deliver on adrenaline activities, which unlike other groups, they are open to.
- With 58% being families, this is a barrier as we know families are harder to cater to.
- Location barriers – Dunedin is harder to get to for them as they need to take >1 flight.

MICRO-SEGMENTS WHERE THERE IS OPPORTUNITY:

As Hardcore Experience Seekers are a smaller portion of the market, and Dunedin can’t deliver to adrenaline activities, we didn’t speak to this group.

*Under-indexes
**Over-indexes

Occasionists

31% of the Domestic NZ Travellers

Occasion Visitors make up the largest percentage of the NZ Domestic Travelers Market. They are travelers who go to new destinations with a specific purpose in mind, such as visiting family, going to an event, or for business purposes.

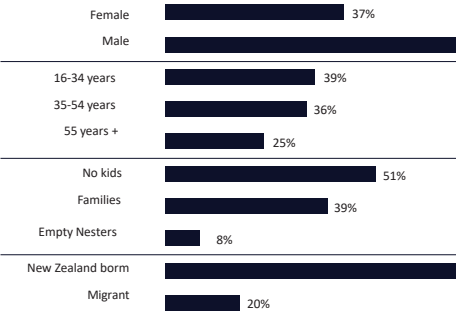
For these travelers, they don't have much influence over the place, as the place is more of a byproduct of the experience they are going to have.



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DEMOGRAPHICS

Who are they?



LOCATION AND ACCESS

Where are they coming from?

Auckland, Wellington and Christchurch

HOW WOULD THEY GET TO DUNEDIN?



More likely to fly to us, although 34% lie out of reach – meaning >1 flight

They can get to us, however, place isn't a key consideration factor in their decision-making.

TRAVEL BEHAVIOUR

Top three motivations for travel:

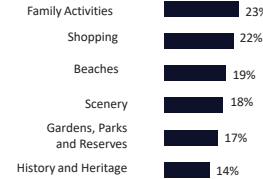
- A place where I can visit my family and friends (32%)
- A place I am familiar with (23%)
- A place where I can unwind and relax (20%)



More likely to be 5-star spenders:
When compared to other segments

- Accommodation (62%)
- Events & Activities (53%)
- Food and drink (60%)
- Shopping (53%)

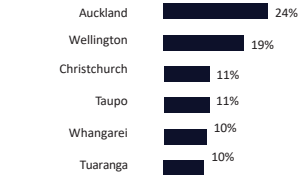
WHAT ARE THEY LOOKING FOR IN A TRIP



What are the destinations on their mind?

Visited **3.3** locations last year
Considering **3.7** locations next year

What are they looking for in a trip:



CONSIDERATIONS FOR DUNEDIN

15% actively considering Dunedin –
Ranked 6th out of 32 destinations

Those who have been to Dunedin...

Typically travelled with: Typically went for:

Partner
Friends

2-3 days

Dunedin attractiveness:



- Dunedin can cater to the things they are looking to do, however they have less control over choice of place

MICRO-SEGMENTS WHERE THERE IS OPPORTUNITY:

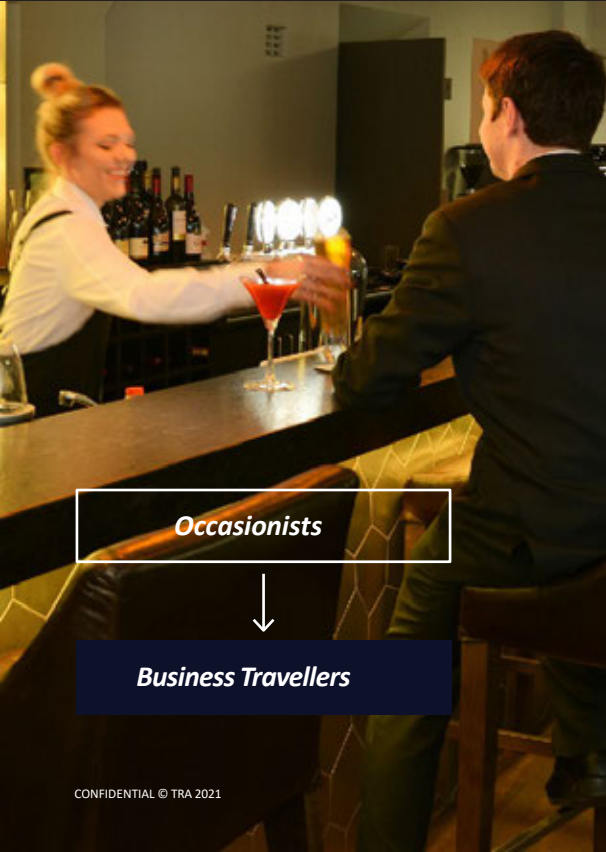
Business Travellers
Traveling for business purposes

*Under-indexes
**Over-indexes

MICRO SEGMENT

Business Travellers

4% of traveller market



KEY DEMOGRAPHICS

Fly Zone, North Island

WHO ARE THEY?

Business travellers are at the mercy of their company– they travel for things like conferences, meetings, and work events. They take their work very seriously, so the sole purpose of their trip is usually business, and they need everything to support their work, especially accommodation. If they have time, they will try to see more of the area they’re in, or better yet, spend a weekend in a destination. They prefer to travel to urban locations where they know they can have access to local offerings, like good food and drink options. The outdoors is appealing for its ability to destress them, however, for the locations they travel to, nature is widely seen as not easy to get to. There is an opportunity to show them the best of Dunedin, and Dunedin’s Outdoors Lite offering, to encourage them to come back for future holiday purposes.

HOW DO WE TALK TO THEM?

Dial up:

- ✓ Accessibility, easy to get around.
- ✓ Accommodation that enables them to do their work well, seamless
- ✓ Urban activities
- ✓ Outdoors Lite
- ✓ Untapped warmth
- ✓ Local experiences
- ✓ Students – innovation
- ✓ Variety of food & drinks

Dial down:

- ✗ Cold – dreary, grey; unpredictable weather
- ✗ Time taken to get there

Dunedin ‘Hero’ destinations:

- Wildlife & outdoors- Tunnel beach, St Clairs Beach, Southern Lights
- Culture & Heritage activities: Heritage buildings, Scottish heritage, Taieri Gorge Railway, University of Otago, Otago Museum
- Local experience – Craft beer, food offerings, music scene

Where do we target them?

- Interest forums – ie tramping
- Google search

”It helps having visited a destination before for business. It means that I know how to get there, how to rent a car there, where to stay, and ultimately, I feel emotionally comfortable.”

Evaluating these segments against key criteria, we can prioritise the low-hanging fruit

Micro-segment	<i>Outdoor Enthusiasts</i>	<i>Migrant Explorers</i>	<i>Drive In Entertainment</i>	<i>South Island Discoverers</i>	<i>Silver Leisure Goers</i>	<i>Business Travellers</i>	<i>Hardcore Experience Seekers</i>	<i>Holidaymakers</i>
Consideration	✓	✓	✓	✓	✓	✗	✓	✗
Competitiveness	✓	✓	✓	✗	✗	✗	✗	✗
Accessibility	✓	✓	✓	✓	✗	✓	✗	✗
Delivers to what they are looking for	✓	✓	✓	✓	✓	✓	✗	✗

Let's talk

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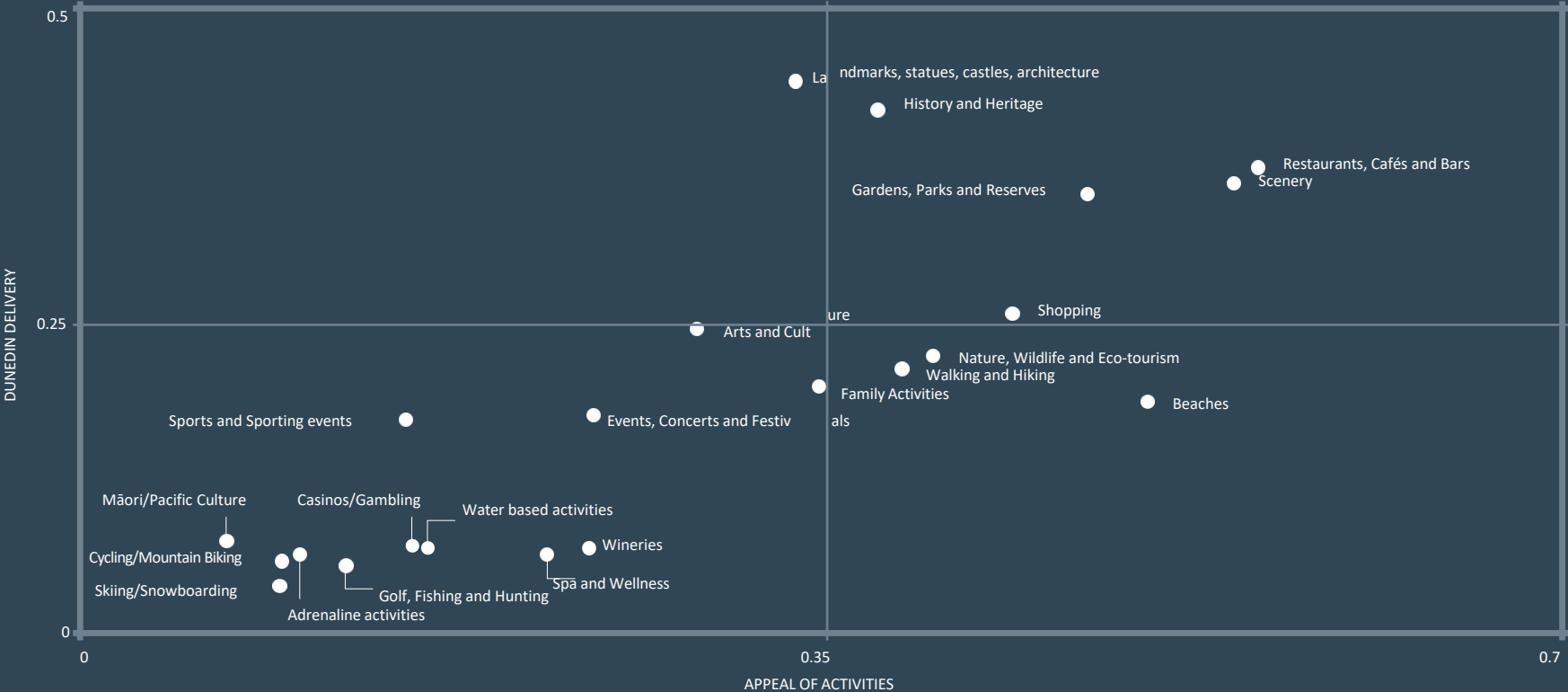
TRA

Appendix

TRA

Dunedin has the potential to deliver to the things that Kiwis are looking for in a holiday.

Dunedin has many strengths that we can be known for.



Source: TRA Quantitative Study on Domestic Travel, 2021
Appeal: Still thinking about travelling domestically, which of the following types of activities or experiences would you be interested in? Dunedin Delivery: Lastly, which of the following activities or experiences do you associate with Dunedin? Base: Total Sample (n=537)