

Understanding Domestic perceptions of the West Coast

A debrief created for Development West Coast by One Picture
August 2021

What was our objective & approach?

Our key objective from this project:

To adopt a consumer centric approach for surfacing key economic opportunities for the West Coast by:

1. Understanding the travel mindsets, needs and behaviours of the domestic audience to optimise opportunities for the West Coast
2. Understanding the 'hooks' that can motivate New Zealanders to consider the West Coast

How did we go about it?



1. Workshop session

Discussing and exchanging ideas with key Development West Coast stakeholders on what we already know, and what we want to know



2. 12 In-depth interviews

Speaking with individuals for an hour to understand their process and motivations when it comes to a domestic holiday



3. Two Co-design focus groups

Speaking with 2 groups of 8 consumers for two hours in AKL and CHC to take early concepts in and craft them together



4. Nationwide feedback

We surveyed 1,142 people in our One Picture Neighbourhood who answered 7 questions about the West Coast. Note: Not a representative sample

**Interestingly, and unlike other destinations in NZ,
we were seen as a district, rather than a collection
of towns each promising something unique**

**We had few defining narratives around specific
towns... not even Hokitika was synonymous with
any one thing**

**Which means when Kiwis think about a trip to the
West Coast, it's hard to know where to start**

**Mining &
Settler
towns**

**Incredible bush
and coastline**

Glaciers



The opportunity we heard time and time again is that once you've been there, you'll want to go back

- As we were talking to those who had been on a trip to the West Coast, it always came up that they had something left unfinished that they'd love to go back and do
 - There was a sense that it's truly hard to understand all the things you can do there until you visit
- We're so vast and interesting, this happens naturally. We heard stories of people coming over for Wild Foods, or the Greymouth Bike Race, and racking up lists of things to do the next time they returned
- This was reflected in the survey we ran... of those who had been to the West Coast before, 92% want to return



SO: We need to think about how we get visitors there the first time, and then our natural assets and interesting people bring them back

In our experience, domestic travelers are looking for a mix of four needs when dreaming & planning a trip

The 4 MINDSETS we know drives travel behaviour and planning

Play

A trip surrounded by fun and activities that bring you together

Thrill

Seeking a departure from the road well trodden / a younger mindset

Refresh

A 'flop and drop' location focused on food, drinks and comfort

Knowledge

Passing of knowledge and appreciation of where you/or others have come from

We confirmed these four needs still represented what was required to start the DREAM phase, but pivotally what was important to begin the PLAN phase...

What will my holiday be made up of and what will I be doing?

For this process, we created five distinct territories based on these needs

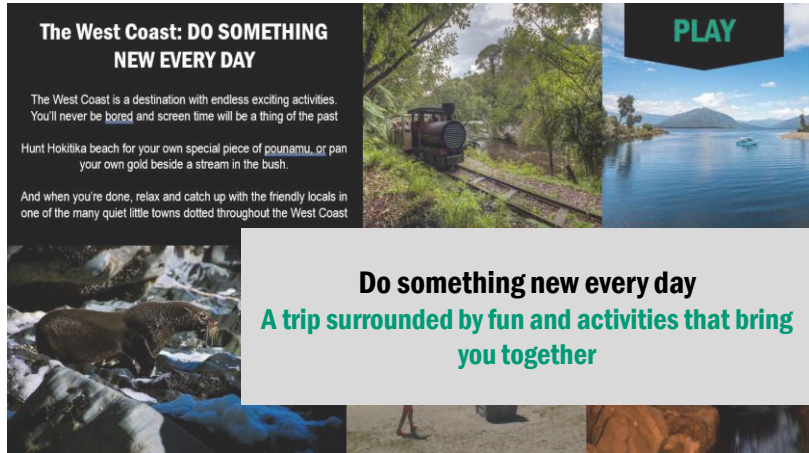
The West Coast: DO SOMETHING NEW EVERY DAY

The West Coast is a destination with endless exciting activities. You'll never be bored and screen time will be a thing of the past.

Hunt Hokitika beach for your own special piece of pounamu, or pan your own gold beside a stream in the bush.

And when you're done, relax and catch up with the friendly locals in one of the many quiet little towns dotted throughout the West Coast

PLAY



Do something new every day
A trip surrounded by fun and activities that bring you together

West Coast Untamed Natural Wilderness

The West Coast: UNTAMED NATURAL WILDERNESS

The West Coast is the best of what New Zealand nature can be – rugged, beautiful and untamed

Or get immersed in the beauty of the West Coast's stunning natural rivers and lakes with a thrilling twist

EXHILARATION



Untamed natural wilderness
Getting deep into the wilderness and losing yourself

The West Coast: GENUINE SURPRISE

The West Coast is the perfect balance of fun, excitement and relaxing in between

Be surprised every time by the diverse landscapes, people and experiences in the region. Be free to be truly you!

While it's wild, there's still a great selection of comfortable accom, good coffee, and the craziest Instagram photos

PLAY



Genuine Surprise
Showing off the both the tame and the untamed sides of the coast... showcasing how much there is to do

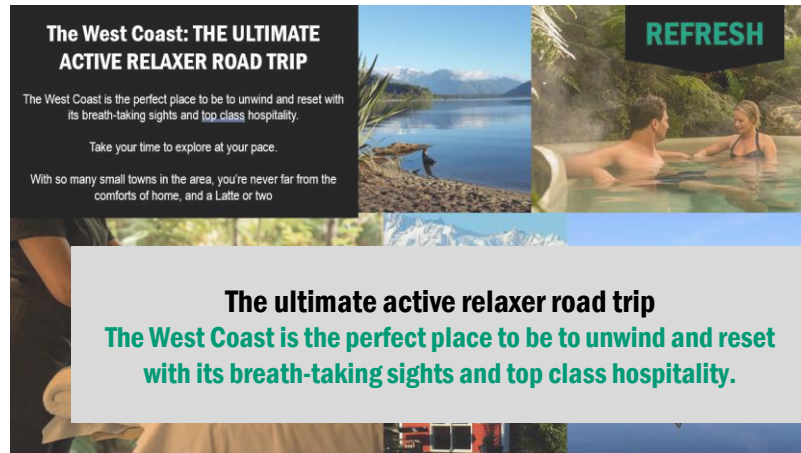
The West Coast: THE ULTIMATE ACTIVE RELAXER ROAD TRIP

The West Coast is the perfect place to be to unwind and reset with its breath-taking sights and top class hospitality.

Take your time to explore at your pace.

With so many small towns in the area, you're never far from the comforts of home, and a Latte or two

REFRESH



The ultimate active relaxer road trip
The West Coast is the perfect place to be to unwind and reset with its breath-taking sights and top class hospitality.

The West Coast: AOTEAROA'S OUTDOOR MUSEUM

Take a trip where you come home knowing more than when you left

The West Coast has a wealth of mining history, natural wonders and engaging wildlife... everywhere you turn there is a story to be told and something to learn more about.

Go deep into the most undiscovered parts of New Zealand

KNOWLEDGE



New Zealand's outdoor museum
Passing of knowledge and understanding about New Zealand's pioneer past, as well as getting hands on with NZ's flora and fauna

And how did they perform?

Unsurprisingly, those based on activities and relaxing had wide appeal

But the spread of appeal shows that the Coast has the ability to meet the needs of a wide set of travellers

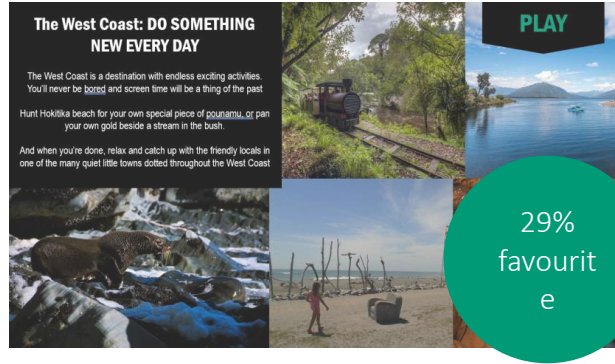
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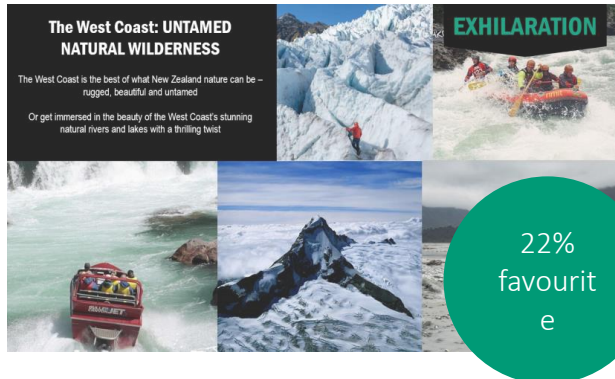
29% favourite

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EXHILARATION



22% favourite

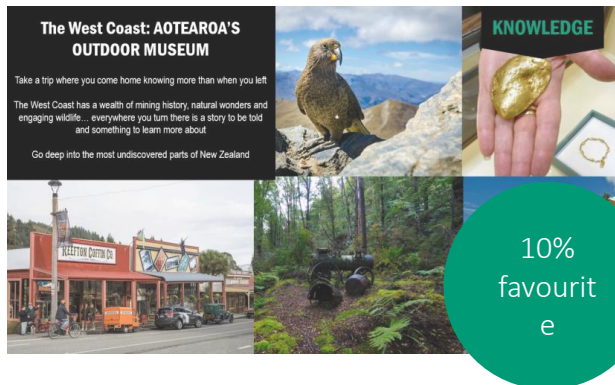
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KNOWLEDGE



10% favourite

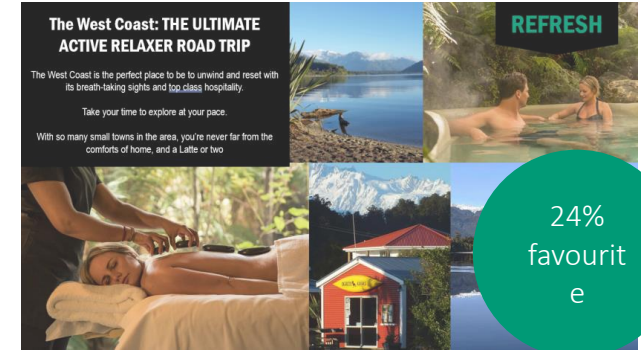
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REFRESH



24% favourite

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PLAY



14% favourite

We also tested 'Untamed Natural Wilderness'

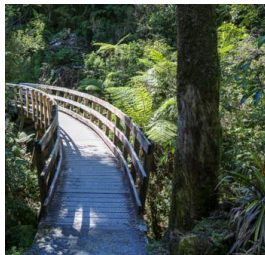


The tagline worked generally for most consumers we spoke to – it highlighted our biggest natural asset... our natural beauty. So for someone looking for a holiday in the wildest parts of NZ, it's perfect

But the 'untamed' part can make some question whether a West Coast holiday will be 'roughing it'... we do need to soften this for some comms executions and think about how one persons 'tame' can be another's 'untamed'

What might 'untamed' look like in each

case?



Do something new every day

A trip surrounded by fun and activities that bring you together

The ultimate active relaxer road trip

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New Zealand's outdoor museum

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Untamed natural wilderness

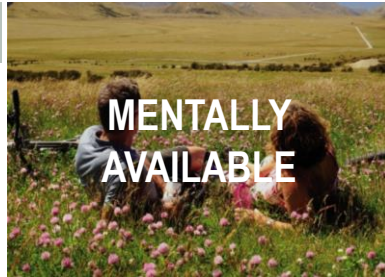
Getting deep into the wilderness and losing yourself

A photograph of a snowy mountain landscape with a helicopter on the ground. The scene is partially obscured by a dark teal overlay. The helicopter is a small, yellow and black model, positioned in the lower center of the frame. The background shows rugged, snow-covered mountain peaks and a cloudy sky.

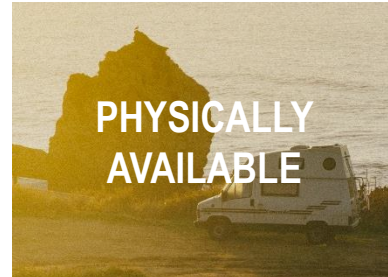
What is helping them plan?
UNDERSTANDING THE FUNCTIONAL
DRIVERS

It's a combination of these 5 drivers that shift us from dreaming to planning

Is it...



Being front of mind when I think about an NZ holiday



How long does it take to get there and how hard is it to travel around



Having both the time and the financial capability to afford to do what I want to do



Something to get look forward to and can't wait to post on Instagram



Even in a storm I will have something to do, a comfortable spot and not feel like I've missed out

AND WHILE NOT ALL NEED TO BE PERFECT, THERE'S GOT TO BE ENOUGH POSITIVE ELEMENTS TO **BALANCE** OUT THE COMPROMISES

THE MORE OF THESE DRIVERS THAT ARE ALIGNED **THE FASTER OUR DECISION MAKING BECOMES**

Middling Mental and Physical availability scores mean we currently aren't an 'easy' destination

BUT with Interesting and Aspirational being our lead drivers, we are in better space than many

Both are strong pull factors that help enable the planning process. Once combined with a better Mental Availability score, will help us overcome some of our other physical and cost-based challenges that are hard to change



Throughout this process, we spoke to those who had been to the West Coast

We found four reoccurring personas

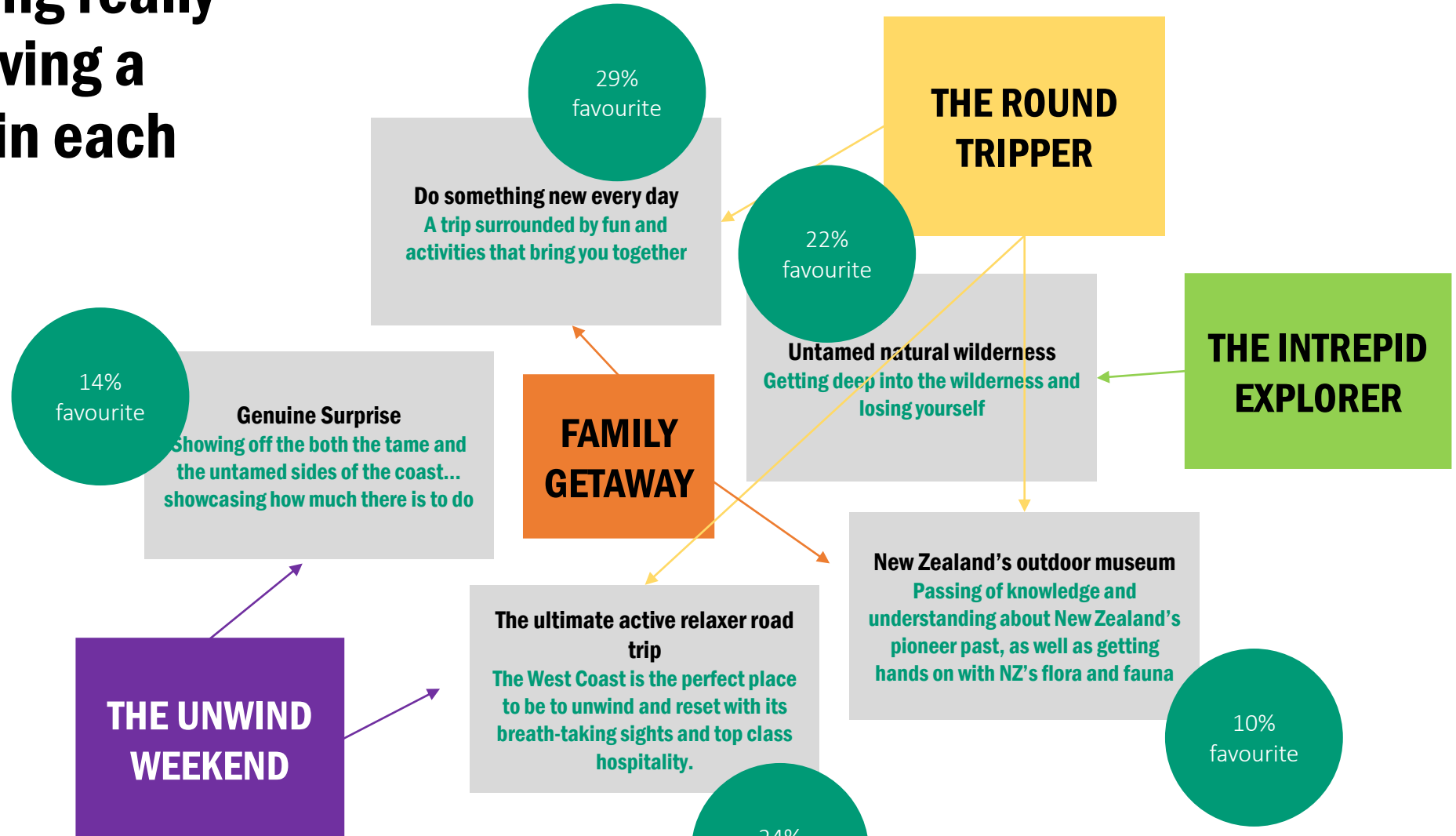
THE INTREPID
EXPLORER

THE ROUND TRIPPER

FAMILY GETAWAY

THE UNWIND
WEEKEND

When it comes to needs it's not only about doing really well, it's about having a clear story to tell in each space



And taking the best of what we offer and showing it to the rest of New Zealand

- We have a destination that is both aspirational and interesting, just not top of mind and a bit hard to get to
- If we focus on salience and making ourselves more front of mind, the easier it will become for consumers to accept our challenging physical location
- It's about building the 'reason why' just that first time. Once we have them in the door, they'll come back for more

Where would we start?



**MENTALLY
AVAILABLE**

**PHYSICALLY
AVAILABLE**

WITHIN MY MEANS

ASPIRATIONAL

INTERESTING

Giving each one of our towns a singular specific reason 'why' in the minds of consumers

- Having the ability to think 'Reefton has X', 'I can't wait to get to Hokitika to do X' allows consumers to compartmentalise what we have to offer, to pick and choose what they want to experience, and not overwhelm themselves
- We have already started this process with the Glacier County reposition, but we need to continue down this path throughout the Coast to create higher salience of each of our towns with consumers

This begins to tackle our challenge of cutting through (without spending a lot) and starts to build 'the dream' in all consumers

THINK: Mountain reflections at Lake Brunner, making Hokitika New Zealand's 'pounamu centre', Reefton being a living Settler village

HOKITIKA
GORGE

LAKE
BRUNNER
UNTAMED NATURAL WILDERNESS

HAAST
WORLD HERITAGE
UNTAMED NATURAL WILDERNESS

OPARARA
ARCHES
UNTAMED NATURAL WILDERNESS

GLACIER
COUNTRY

PANCAKE ROCKS
BLOW HOLES
UNTAMED NATURAL WILDERNESS



This has been a One Picture presentation

One Picture believes the best opportunities come from rich, actionable consumer insights that are woven into smart and successful business outcomes. We're dedicated to injecting the customer experience into the organisational bloodstream of our client partners