

Domestic Visitors Research

WellingtonNZ

MAKING THE
WELLINGTON REGION

**Wildly
Famous**

Domestic Visitors Research

In 2020, WellingtonNZ and Destination Wairarapa commission Colmar Brunton to undertake this Domestic Visitors Research.

This research was developed with the intention of better understanding which domestic visitors might be interested in Wairarapa as a destination. This report will present to you results which address:

- Visitors segments based on interest types who are interested in Wairarapa.
- Types of experiences that are attractive to potential visitors
- How to attract different visitor groups with particular types of imagery and how to 'group' experiences for greater appeal.
- The interest in a day trip to Wairarapa

**A place where you can have wild,
memorable, inspirational
experiences all year round.**



MBIE's 'An integrated destination management approach'

INCREASING APPEAL AND UNDERSTANDING YOUR SEGMENTS

There are 9 different domestic visitor segments. Its important to understand which ones are key for your destination and your product to increase the appeal and awareness for potential visitors.

HOW TO USE IMAGERY

Use outdoor imagery with lots of sky, water and greenery to appeal to a wider audience.

Use segment relevant imagery to convert your audience.

TAILORING THE EXPERIENCE

Tailoring the experience to your targeted segment/s is important. Supporting experiences such as hospitality, accommodation and the 'vibe' of the environment is just as important as the hero attraction which draws them to our destination in the first place.

Segmentation

This report uses Tourism New Zealand's DGiT domestic tourism segmentation to understand the appeal of the Wellington region by different traveller motivations. A summary of each of the segments is presented below and more detail can be found by visiting [DGiT.nz](https://www.dgit.nz).



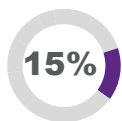
FAMILY & FRIENDS



This segment are visiting their family and friends on their domestic leisure holidays.



FAMILY FUN



This segment want to bond as a family doing things together.



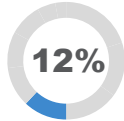
RELAXATION & WELLBEING



This segment want to get away and put their feet up and do very little when they there. This gives them a break from their busy lives. The types of activities they will engage in are low effort or wellbeing type activities.



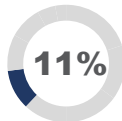
EXPLORE NATURE



This segment wants to get outdoors to explore the natural environment in an active way (most commonly walking). They love exploring the outdoors to discover new places and as a way to relax.



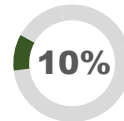
TREAT MYSELF



This segment want an indulgent getaway with their partner (typically a short break). They looking for great food and wine and, for many, some non-strenuous adventure activities to add a bit of excitement.



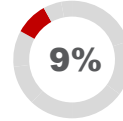
WINE, FOOD, & SCENERY



This segment want to indulge or reward themselves through wine, food, and seeing New Zealand's amazing scenery. Their motives are similar to the 'Treat myself' segment in that they want to indulge in food and wine, but they tend to be older and don't want the adventurous element that the 'Treat myself' segment want.



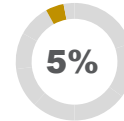
SHOPPING



A shopping trip allows this segment to bond with the friends they're travelling with or it allows them to catch-up with friends and family at their destination. Shopping allows them to escape the routine of their everyday lives.



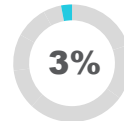
KNOWLEDGE SEEKING



This segment want to discover and learn about their and others history and heritage. They are primarily interested in museums, art galleries, exhibitions and places of significance to Māori. However, they also have some interest in natural attractions (including wildlife) and attending special events.



SPORTS & EVENTS



This segment want to share time with friends and family while doing or watching something they're passionate about. Often this is sport related but it does include cultural events too.

Note. While one segment explicitly references wine and food in its name, wine and food are also important to the Treat Myself, Shopping, and Sports & Events segments. Finding wine and food important across multiple segments (rather than being its own segment) suggests that wine and food needs to be paired with something else to motivate people, e.g., scenery, shopping, an event, or something adventurous.



CURRENT INTEREST IN WAIRARAPA

Measuring current interest from Kiwis who are interested in Wairarapa (those who have not been prompted with what attractions and activities are available in Wairarapa yet) highlights that most of the interest is coming from those who reside closer to the region.



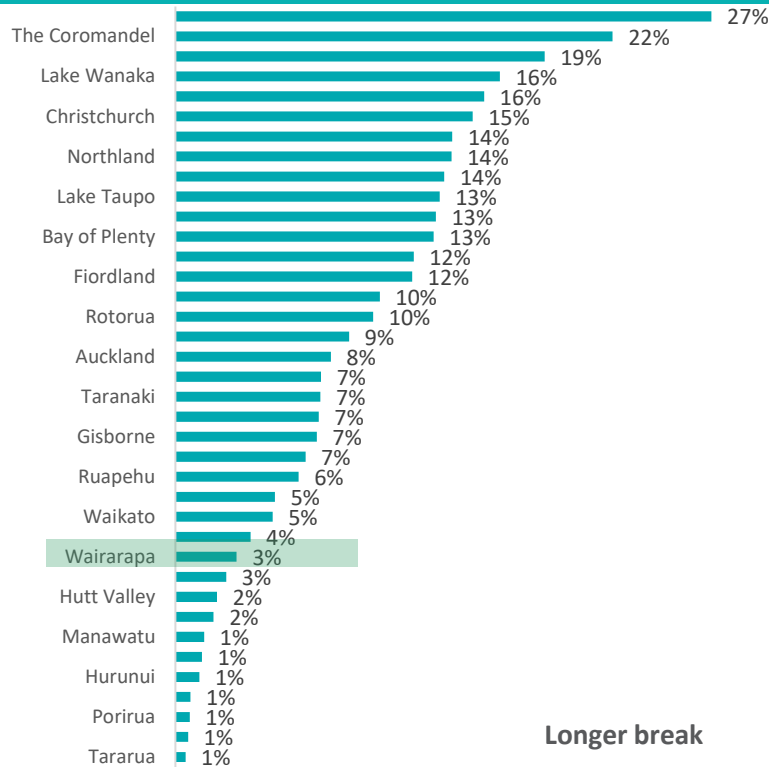
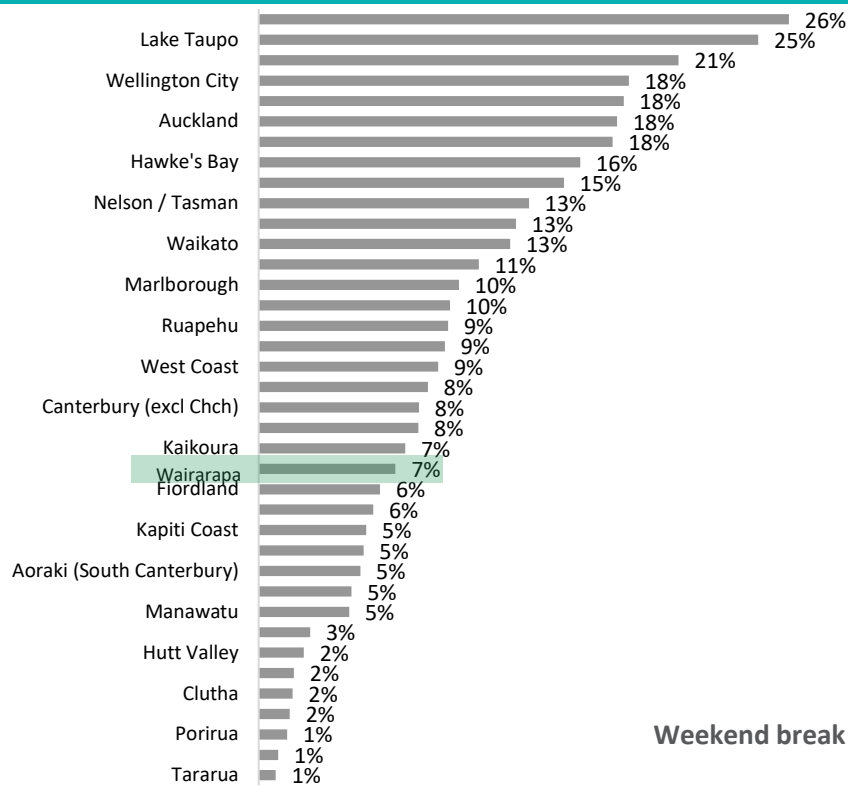
7 PER CENT INTERESTED IN
A WEEKEND BREAK IN
WAIRARAPA



THE LARGEST INTERESTED
MARKET IS FROM THE REST
OF WELLINGTON REGION
AND MANAWATŪ

Wairarapa currently is in the lower half for a weekend break and the lower third for a longer break.

% of people interested in a weekend (up to three nights) or longer break (four or more nights) in each destination

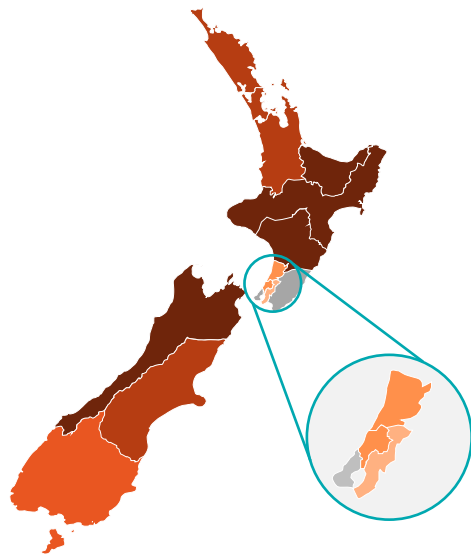


Interest in each destination is greatest amongst those who live closest to that destination

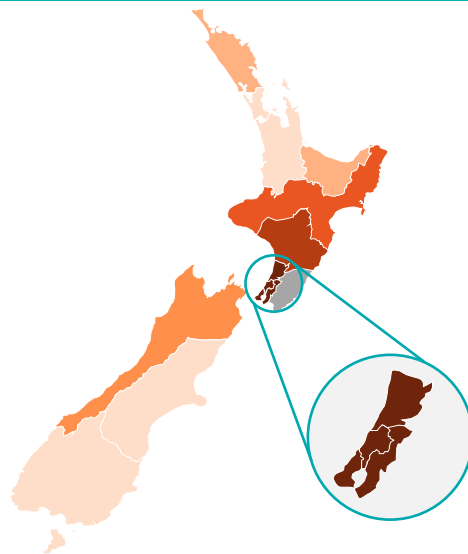
Profile of those interested in visiting Wellington City or Wairarapa for a weekend or longer break – Point of origin

Note. Level of interest is based on percentage interested within a region, the size of the population in each region is not considered. Grey indicates an area people were not asked about, e.g., people living on the Kāpiti Coast were not asked about visiting it.

Where are those interested in visiting Wellington City coming from?



Where are those interested in visiting the Wairarapa coming from?

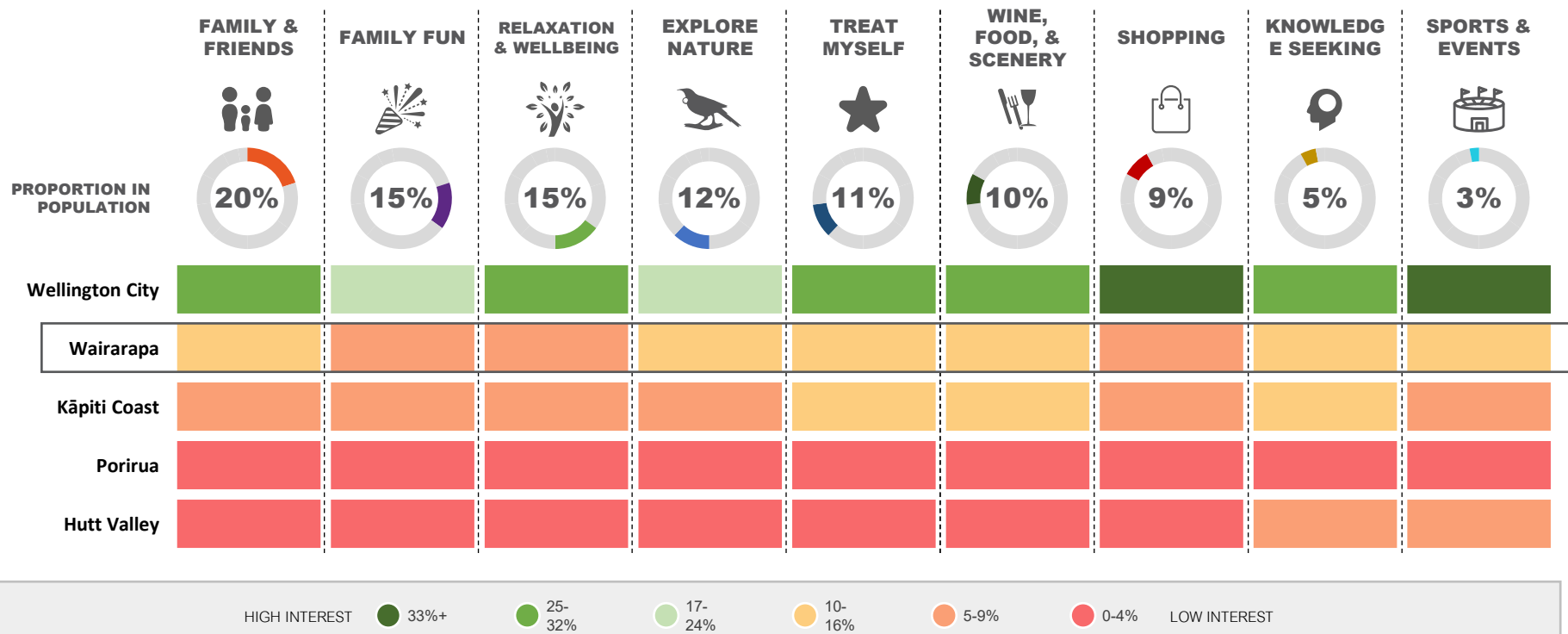


HIGH INTEREST 33%+ 25-32% 17-24% 10-16% 5-9% 0-4% LOW INTEREST

Current Appeal is predominantly in Wellington City

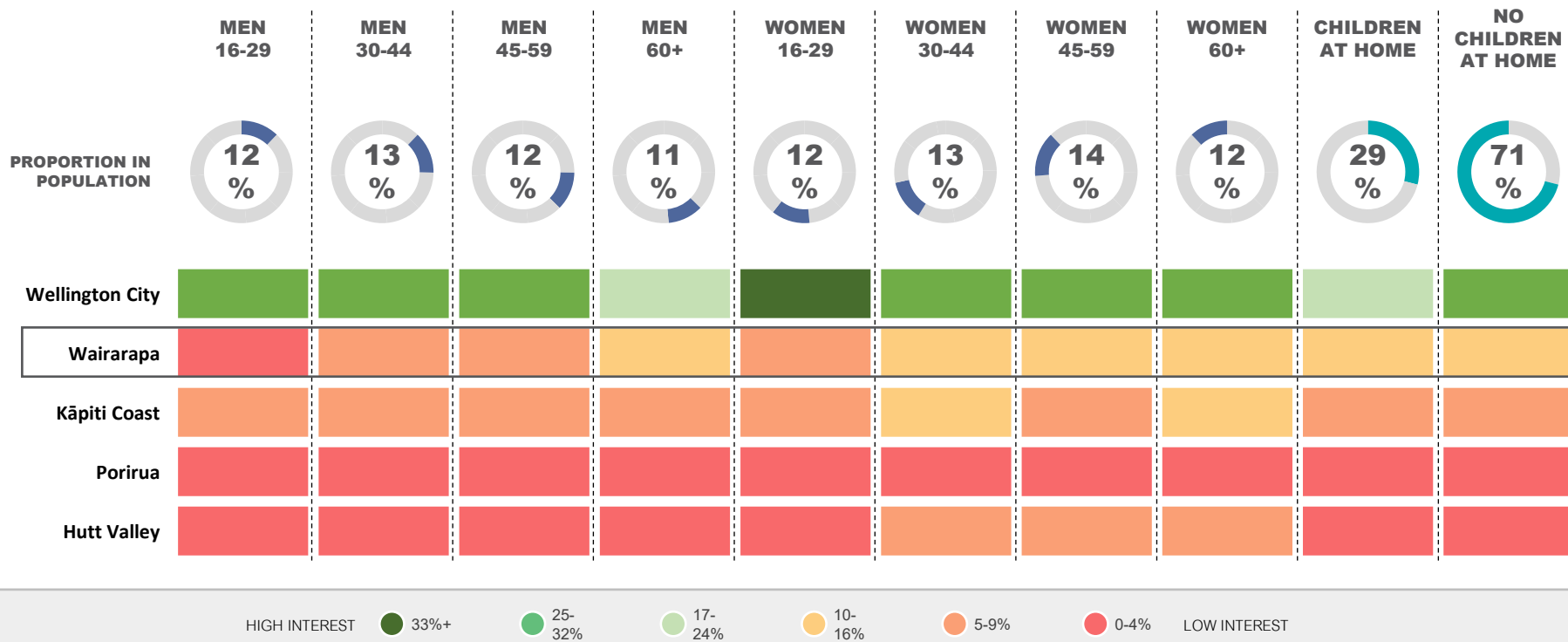
Note: The holiday motivation segments are based on those identified in DGIT (DGIT.nz). The size of each segment is taken directly from DGIT. A detailed explanation of the segments can be found here: <https://www.dgit.nz/domestic-traveller-segments/>

Profile of those interested in visiting each destination for a weekend or longer break – Travel motivations



Current Appeal is predominantly from Women aged 16-29 who make up 12% of Kiwis

Profile of those interested in visiting each destination for a weekend or longer break – Age, gender, and household type





ADDITIONAL APPEAL

Once presented with what activities and experiences are on offer across the region, we see the appeal in both Wairarapa and Kapiti increase significantly.

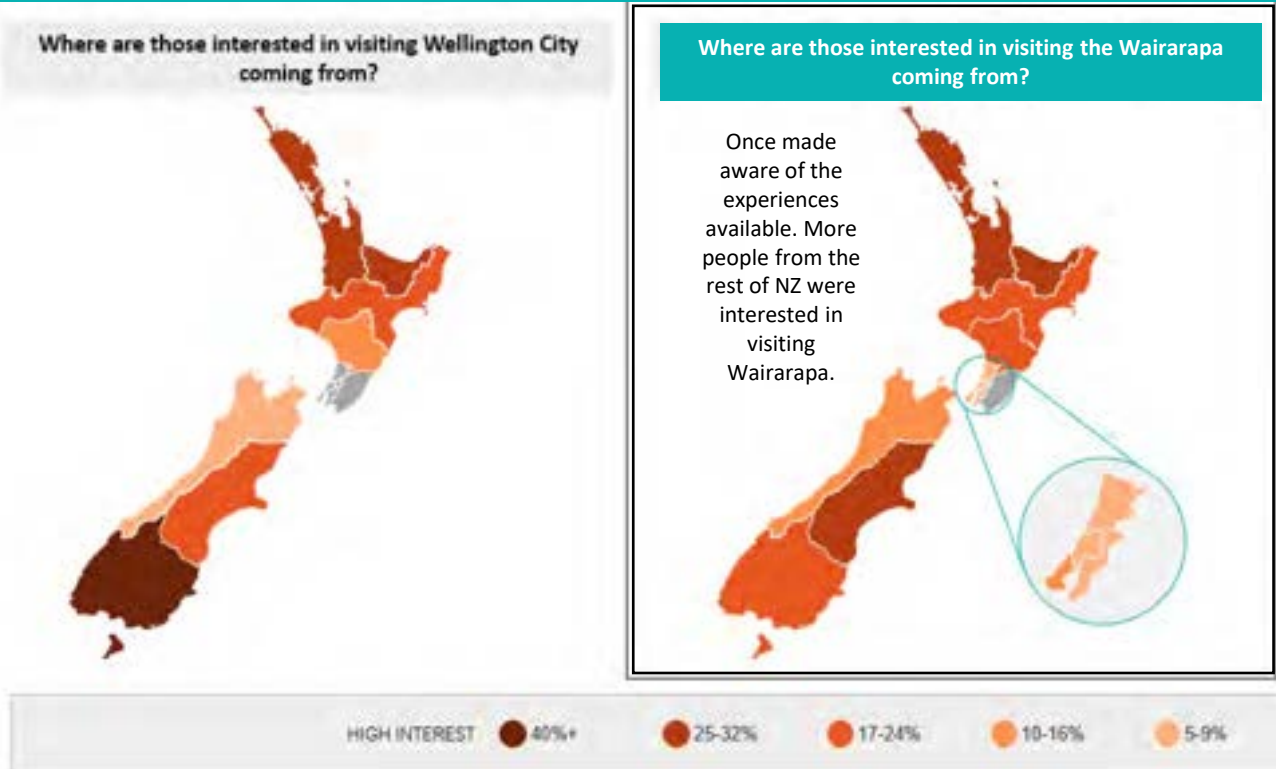


**INTEREST FROM ALL
TRAVELLER SEGMENTS GREW
ONCE MADE AWARE OF THE
EXPERIENCES ON OFFER.**



**MALES AGED 45+ BECAME
MORE INTERESTED IN
VISITING WAIRARAPA ONCE
MADE AWARE OF
EXPERIENCES**

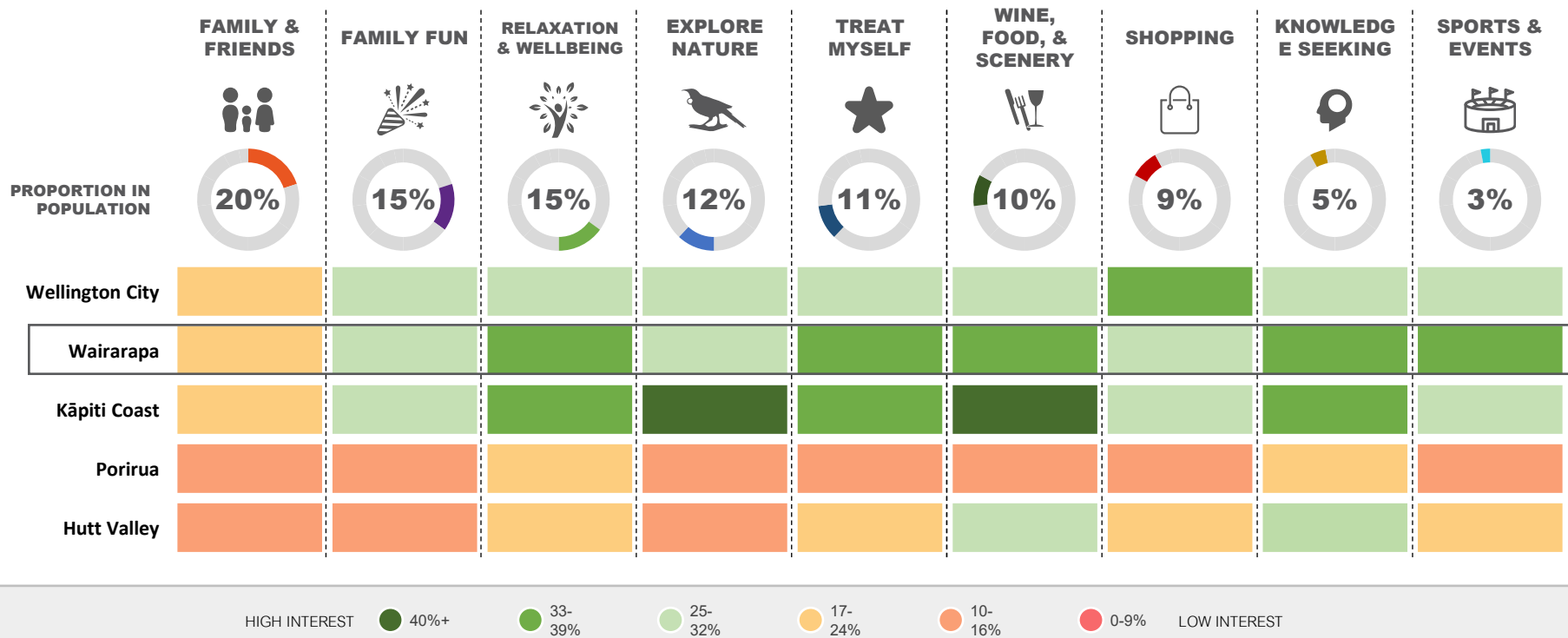
The greatest levels of additional interest in each destination tends to come from those areas where initial interest was lower.



There is strong additional interest in Wairarapa from the Relaxation & Wellbeing, Treat Myself and Wine, Food and Scenery segments

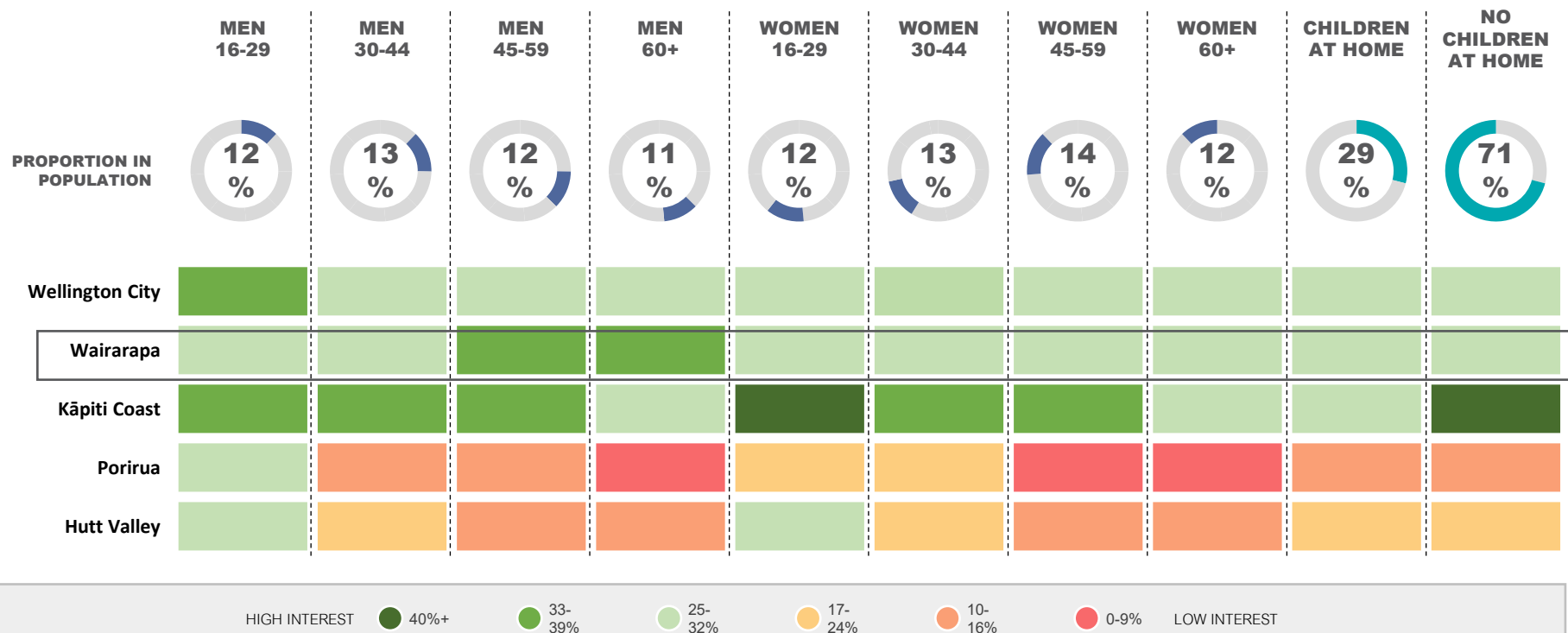
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Profile of those who become interested in visiting each destination once they know what experiences are offered – Travel motivations



There are good levels of additional interest in the Kāpiti Coast across all demographic groups.

Profile of those who become interested in visiting each destination once they know what experiences are offered – Age, gender, and household type



KEY TAKE-OUTS



GROW AWARENESS

The most important thing for Wairarapa is to grow your awareness. Currently, there isn't enough awareness on what experiences are available to potential visitors across NZ.



LOCAL ADVOCATES

There is an opportunity to have locals become your advocates. So, they can invite friends and family to experience Wairarapa with them.



DIFFERENT SEGMENTS

There is an opportunity to develop and grow your visitor market across all segments.



TOP THREE SEGMENTS

The top three segments with the most opportunity are; Treat Myself; Wine, Food & Scenery; and Relaxation and Wellbeing.



Top Three Segments



TREAT MYSELF

This segment want an indulgent getaway with their partner (typically a short break). They looking for great food and wine and, for many, some non-strenuous adventure activities to add a bit of excitement.



WINE, FOOD AND SCENERY

This segment want to indulge or reward themselves through wine, food, and seeing New Zealand's amazing scenery. Their motives are similar to the 'Treat myself' segment in that they want to indulge in food and wine, but they tend to be older and don't want the adventurous element that the 'Treat myself' segment want.



RELAXATION & WELLBEING

This segment want to get away and put their feet up and do very little when they are there. This gives them a break from their busy lives. The types of activities they will engage in are low effort or wellbeing type activities.

Attracting visitors – hero experiences

A destination's best (or 'hero') experiences are the key drivers of visitation. They provide a compelling reason to visit and they also make a destination salient.

Supporting themes and experiences, accommodation, attractions, hospitality, retail are the factors people investigate about a destination once their interest has been piqued. For example, does the destinations have enough other experiences to keep them busy or does it have the right type of accommodation?

This section identifies the 'hero' experiences in the Wellington region. A later section explores the supporting themes and experiences, accommodation, attractions, hospitality and retail.



From MBIE's 'An integrated destination management approach'.

Wairarapa Experiences

Wording which was used to describe to potential visitors to gauge interest

Cape Palliser – walk to the Putangirua Pinnacles one of the country's most unique rock formations, see fur seals, Ngawi fishing village and climb up to the Cape Palliser lighthouse.

Discover Wairarapa regional food – taste and buy award winning specialities direct from the producer and at markets – cheese, olive oil bread, chocolate, beer, honey, bread, meat

Pukaha National Wildlife Centre – a sanctuary for native wildlife including, kaka, kokako, eels, some of New Zealand's most endangered birds in aviaries, eels and a white kiwi.

Martinborough – a wine village surrounded by small vineyards and more than 20 cellar doors, most within easy walking or cycling distance from each other.

Greytown – a country village with small sophisticated independent boutique stores in restored Victorian buildings

Castlepoint – swim, surf, fish and walk up to the distinctive lighthouse. The soft white sand, lagoon and reef are popular as is the track up Castle Rock.

Stonehenge Aotearoa – an open air astronomical observatory built on the same scale as Stonehenge in the UK.

Wairarapa Dark Sky Sanctuary – an area without light pollution so you can see the stars clearly. Guided tours are available so you can hear stories and learn as you star gaze

Wairarapa Garden Tour - visit private gardens on a multi day spring garden festival

Toast Martinborough and Wairarapa Wines Harvest Festival – wine and food festivals with local wines matched with restaurants and local food producers, as well as great music

Remutaka Cycle Trail – running from Wellington to the Wairarapa, the trail provides a ride with urban, rural, historic railway, lake-side and ocean settings.

Masterton – town with a park in the middle with a large playground, mini-putt, paddle boats, lake and miniature train. Home to the national sheep and shearing museum and a museum about the region

Featherston – known as a Booktown, it has eight second-hand bookstores, and an annual festival celebrating everything to do with books, writers and reading.

Food Tours – on guided behind the scenes tours at some of the Wairarapa's vineyards and artisan food producers.

Music festivals – camping/glamping amongst ancient bush and trees at a multi-day music festival featuring international and local performers.

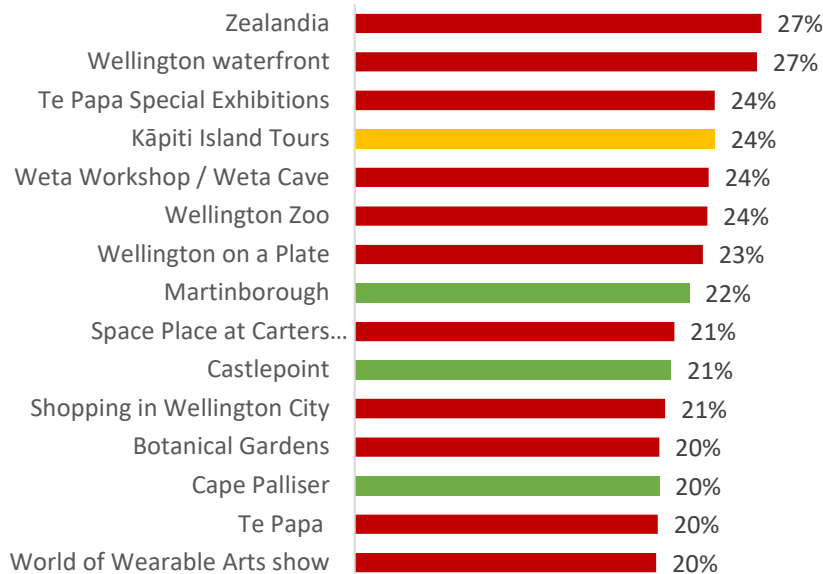
Cobblestones Museum – a collection of six heritage buildings from the days of early European settlers

Wings Over Wairarapa – over 70 aircraft, including vintage, military, jets, helicopters, and aerobatic displays

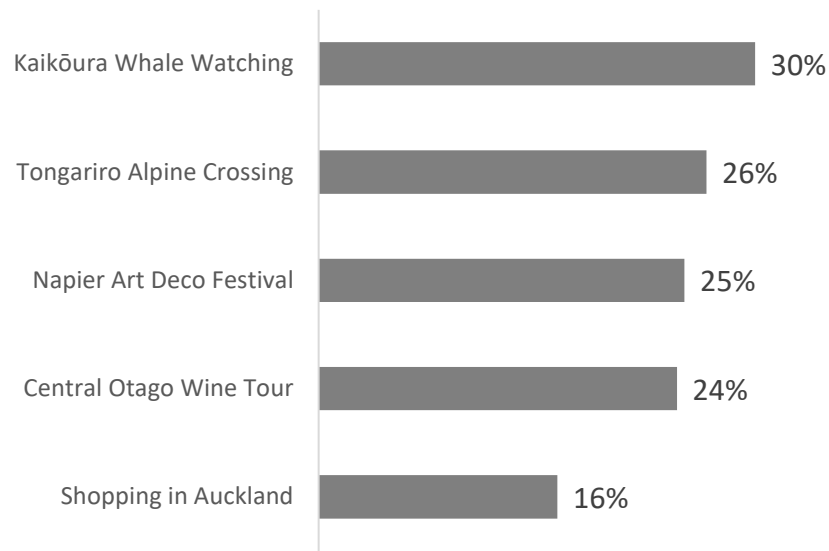
The top ('hero') experiences in the region are as appealing as some of the top experiences from the rest of the country.

% identifying each experience as a 'hero' – i.e., something so appealing they would choose where to go just so they could do it or experience it

Top 15 'Hero' experiences in the Wellington/Wairarapa region

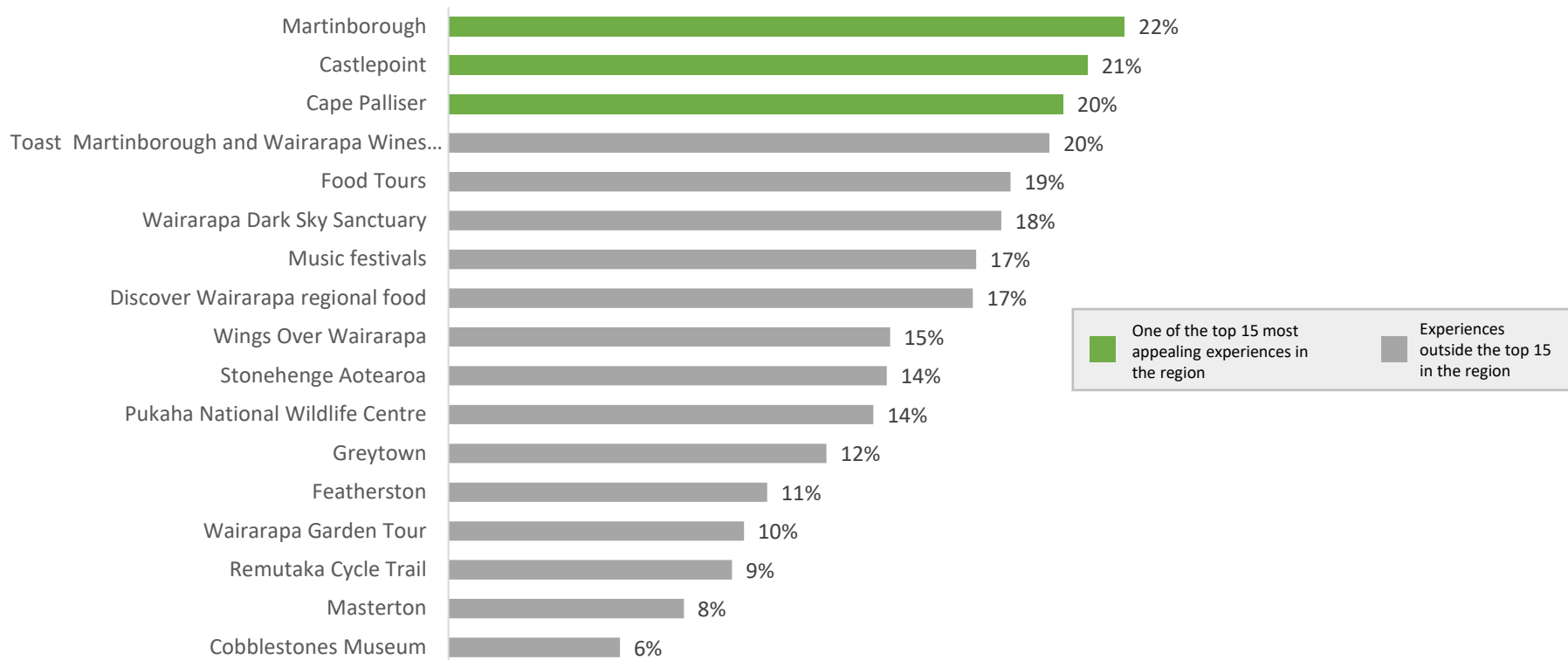


Appeal of benchmark experiences from the rest of the country



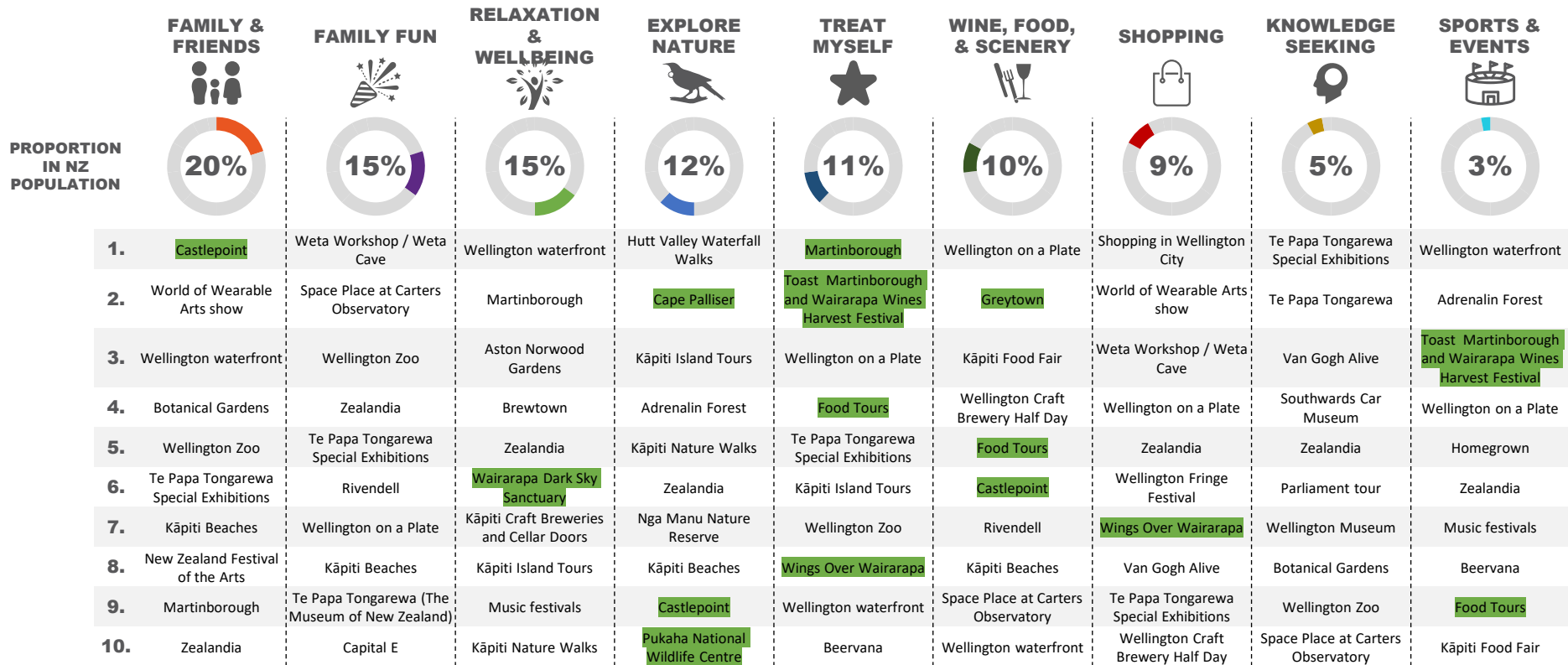
The Wairarapa has three experiences in the top 15 regionally

% identifying each experience as a 'hero' – i.e., something so appealing they would choose where to go just so they could do it or experience it



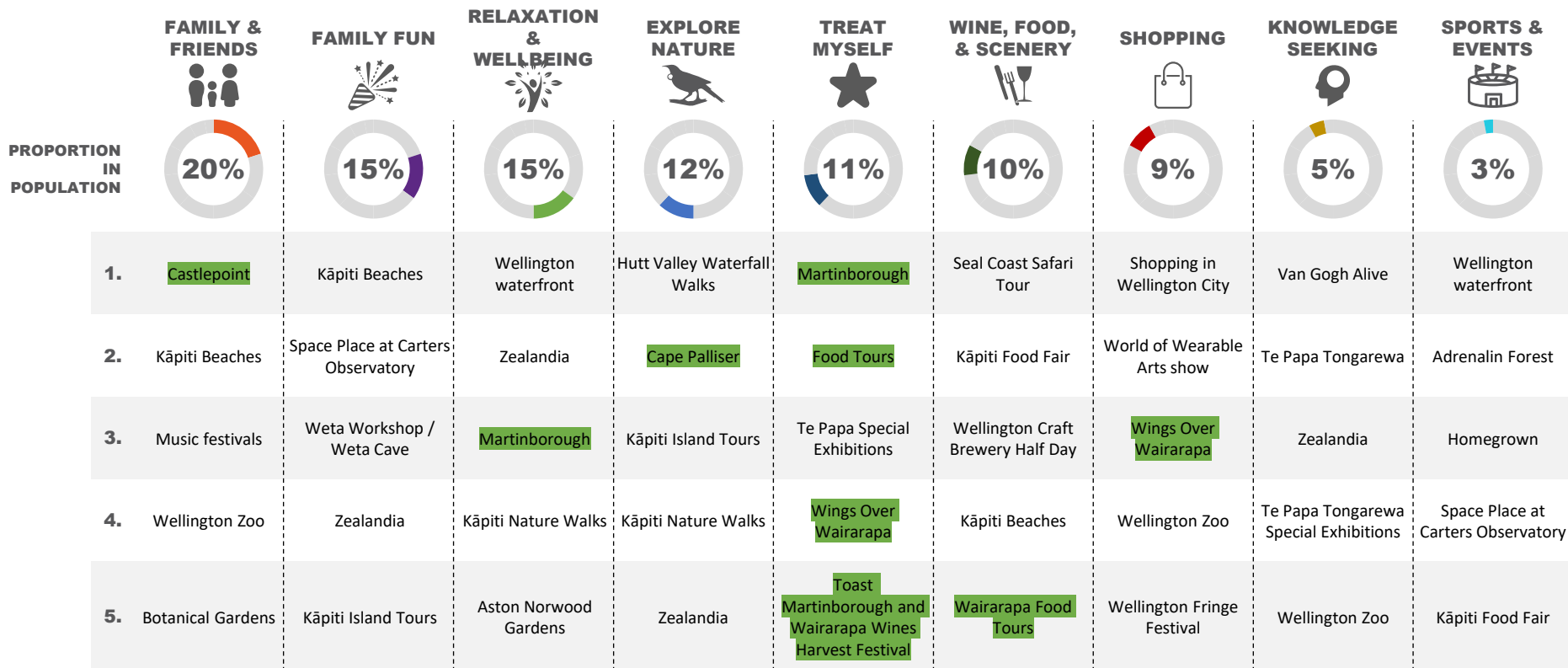
The appeal of experiences differs considerably by travel motivation.

Most appealing 'hero' experiences IN the Wellington/Wairarapa region by travel motivation



Those who were not initially interested in visiting Wellington/Wairarapa still considered these experiences as ‘Hero’ experience to travel for.

% identifying each activity as a ‘hero’ amongst those not initially interested in visiting the Wellington/Wairarapa region by travel motivation



The Auckland Market



CURRENT INTEREST IS CITY

There is strong interest in Wellington City as a destination for a short or long break amongst Aucklanders. However, there is little EXISTING interest in the other destinations in the region.



INTEREST INCREASES SIGNIFICANTLY ONCE AWARE OF EXPERIENCES.

Once made aware of the types of experiences in other parts of the region. The interest from Aucklanders to visit Wairarapa and Kapiti in particular significantly increases.



7 HERO EXPERIENCES IN WAIRARAPA FOR AUCKLANDERS

There are seven experiences in the Wairarapa which Aucklanders have reported they would consider as Hero experiences that would travel to the region for.

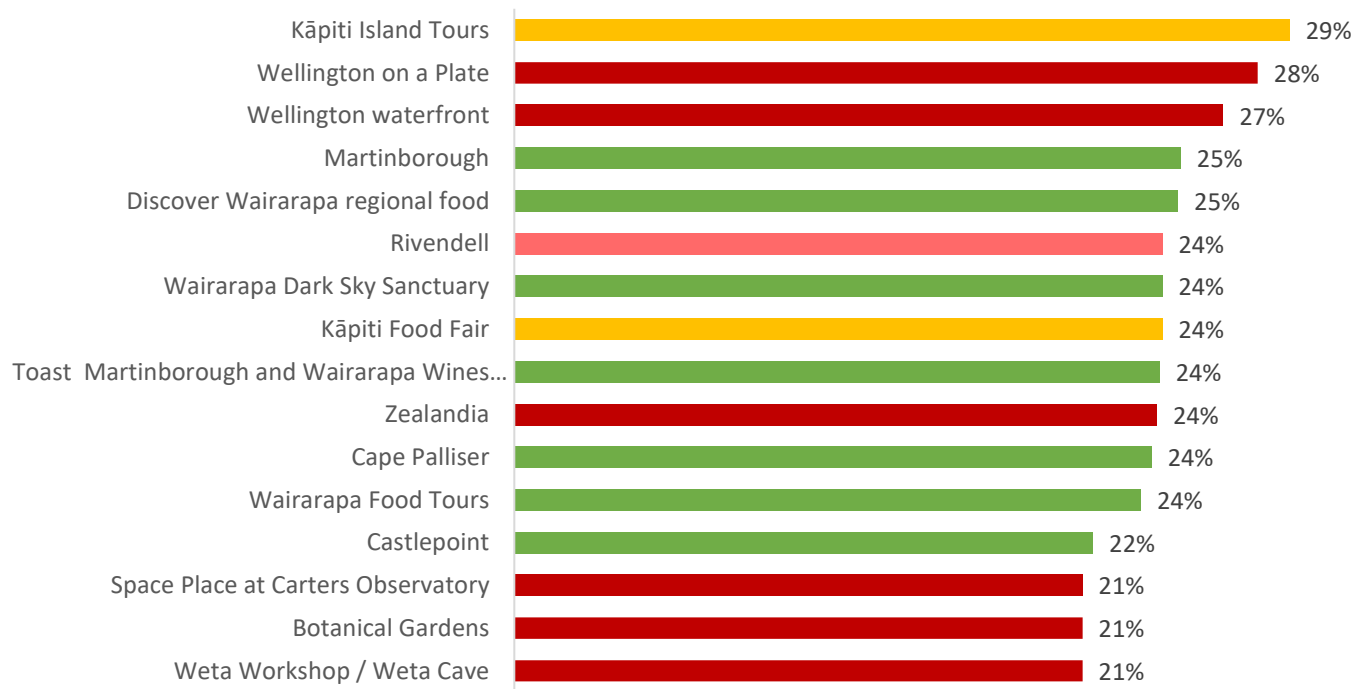
Existing interest from Aucklanders

Before they were made aware of the experiences available.



The Wairarapa has seven 'hero' experiences which are appealing enough to attract Aucklanders for a short or long break.

% identifying each experience as a 'hero' – i.e., something so appealing they would choose where to go just so they could do it or experience it



Wellington
City



Wairarapa



Kāpiti Coast



Hutt Valley



Porirua



ATTRACTING VISITORS WITH HERO IMAGES

When looking at the relative impact of images on intention to travel we are able to extract some general principles about the type of images that influence behaviour the most.

Generally speaking, wide landscape outdoor images which show a lot of 'blue' and 'green' tends to attract most audiences.

However, depending on the segment. There are images which could add additional interest amongst different interest groups.



IMAGES NEEDS TO PORTRAY A POSITIVE AND RELAXING EXPERIENCE.

Wide landscape shots are very attractive to people. In particular images with water where the scenery is portraying a relaxing and positive environment.



PEOPLE LIKE TO BE ABLE TO PICTURE THEMSELVES IN THAT SCENE.

People like to be able to picture themselves and their loved ones in the same setting enjoying the experience in the image. Being able to picture themselves in the experience drives visitation.

When looking at the relative impact of images on intention to travel we are able to extract some general principles about the type of images that influence behaviour the most.

These are much more appealing* ...

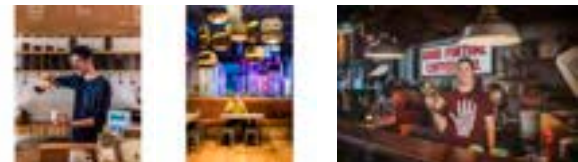
1. Wide landscape shots are more appealing than narrower cityscape ones



... than these



2. Eating outdoors with others is much more popular than indoors or alone



When looking at the relative impact of images on intention to travel we are able to extract some general principles about the type of images that influence behaviour the most.

These are much more appealing* ...

... than these

4. Shots where you can instantly tell what is going on are more likely to drive visitation



5. Shots with water tend to be more appealing than land only shots



With these principles in mind, it is no surprise that these photos are the most likely to drive visitation to the region.

1.



2.



3.



4.



5.



6.



7.



8.



9.



10.



11.



12.



13.



14.



15.



16.



17.



18.



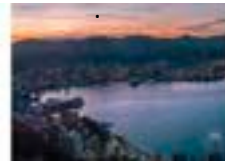
19.



20.



21.



The images that drive behaviour at an overall level also tend to be the ones that are most appealing to the individual travel segments.

Most appealing 'hero' images by travel motivation

Most appealing images



FAMILY & FRIENDS



None



FAMILY FUN



RELAXATION & WELLBEING

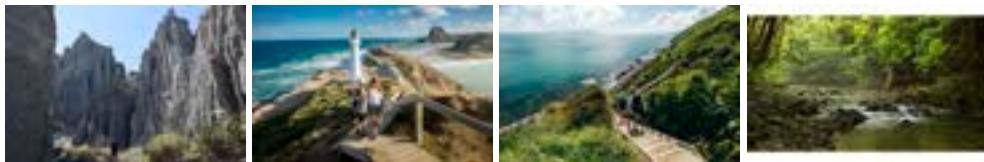


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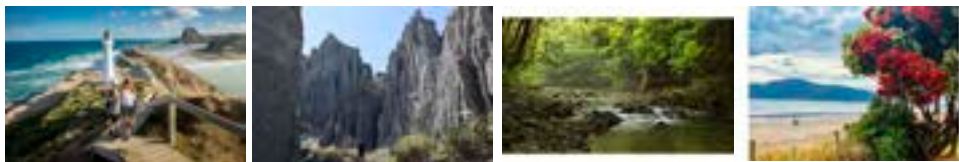
Most appealing 'hero' images by travel motivation

Most appealing images

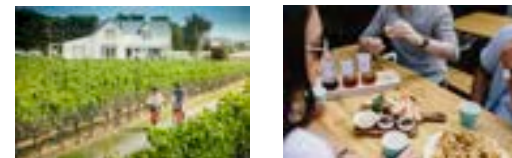
Interest specific images that appeal much more to this segment



TREAT MYSELF



WINE, FOOD, &
SCENERY



The images that drive behaviour at an overall level also tend to be the ones that are most appealing to the individual travel segments.

Most appealing 'hero' images by travel motivation

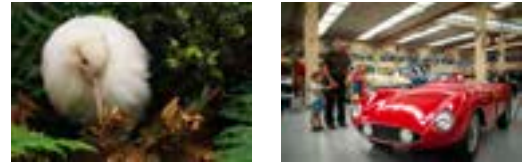
Most appealing images

Interest specific images that appeal much more to this segment

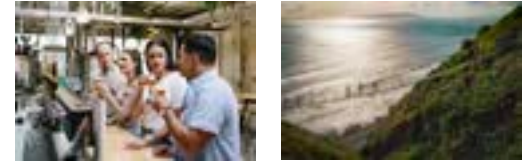
SHOPPING



KNOWLEDGE
SEEKING

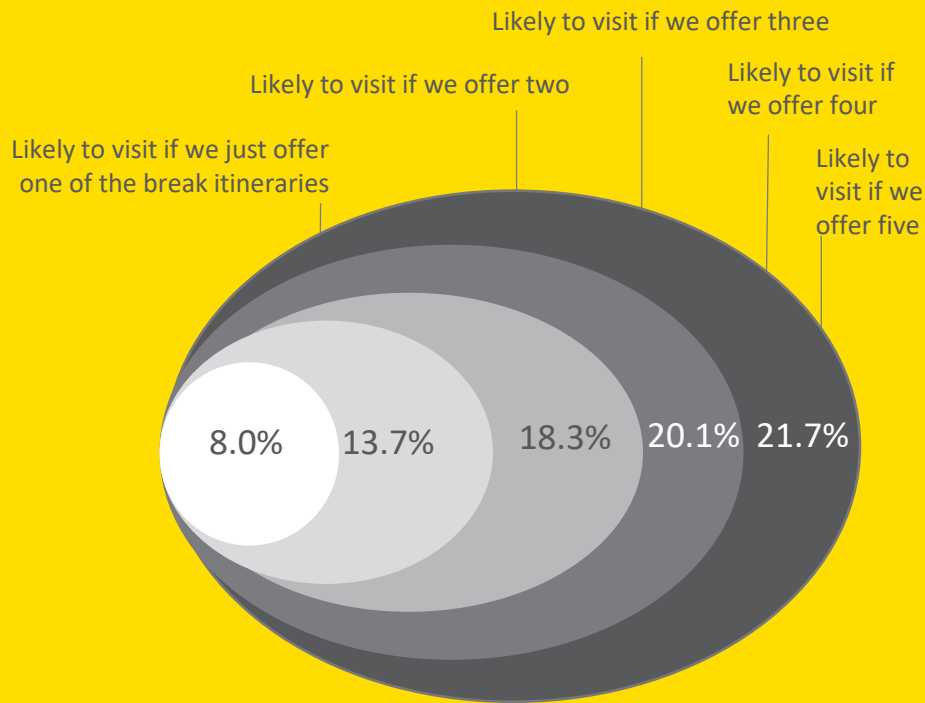


SPORTS &
EVENTS



Optimising Appeal

While there is relatively even appeal across the different itineraries, that doesn't mean we should offer all of them – there is overlap in interest between them and we attract relatively few new people by offering four or five as opposed to three.



OFFERING 2 OR 3 IS THE SWEET SPOT

Targeting just two or three segments/types of experience appears to be ideal as there are diminishing returns (in terms of reaching new people) when targeting more than three because people have overlapping motivations.



2 OR 3 WITHIN AN ITINERARY

The two or three experience offerings could be in partnership with other attractions and activities to collectively offer a particular itinerary for the visitors.



AN OPTIMAL TOURISM OFFERING COULD ALSO BE ONE THAT HAS 2 OR 3 ELEMENTS.

But equally, one tourism offering could be the same product which offers different elements. For example, a chocolate factory tour offers the novelty of visuals, chocolate tasting and hands-on participation in chocolate making.

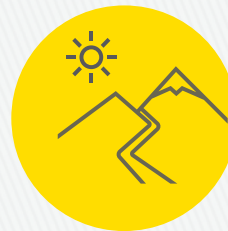


DAY TRIPS TO WAIRARAPA

Wairarapa has many experiences
to offer for day trips.



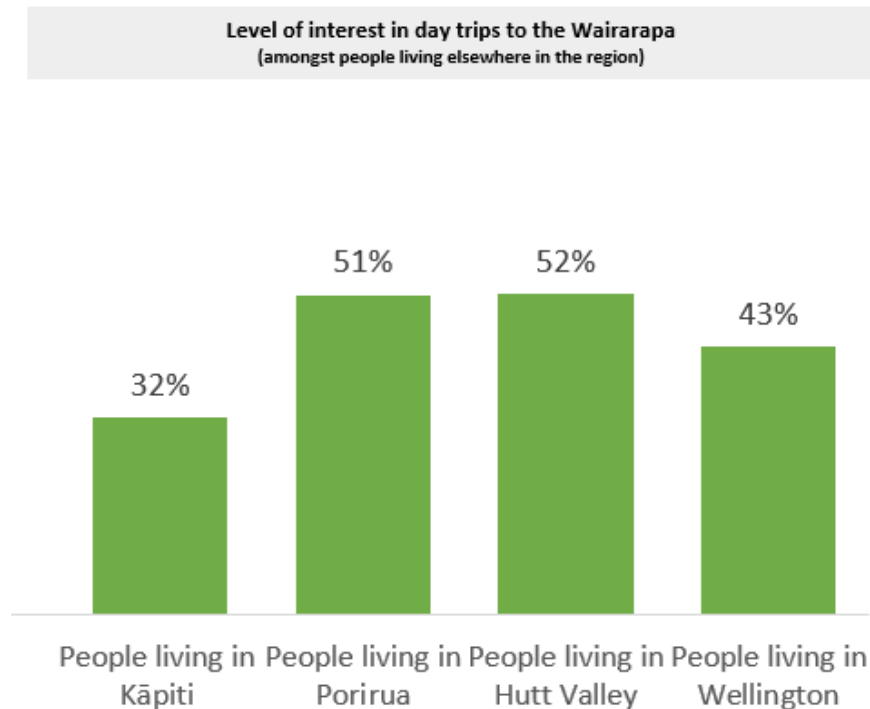
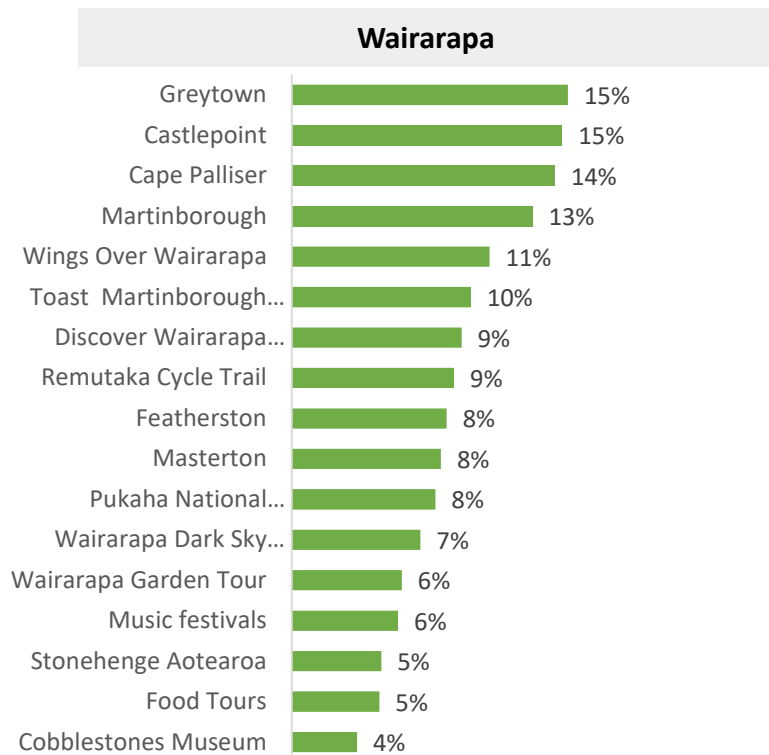
**GREYTOWN AND
CASTLEPOINT ARE THE MOST
POPULAR DAY TRIP HERO
EXPERIENCES**



**OVER 50% OF HUTT VALLEY
AND PORIRUA RESIDENTS
ARE INTERESTED IN DAY
TRIPS TO WAIRARAPA**

Day Trips to Wairarapa

Experiences of interest and who's interested



KEY TAKE-OUTS



GROW AWARENESS

The Wairarapa currently attract little interest outside of the Wellington region. Interest increase remarkably once potential travelers understand the experiences on offer in each destination.



IMAGES TO APPEAL

To maximize the appeal of the region we need to favor images that show: wide-angle landscapes, people eating outdoors, genuine smiles, and include the water. Additionally, the context of the images need to be easy to understand.



FOCUS ON 2 TO 3 OFFERINGS

Targeting just two or three segments / types of experience appears to be ideal as there are diminishing returns (in terms of reaching new people) when targeting more than three because people have overlapping motivations.



WINE AND FOOD IS IMPORTANT

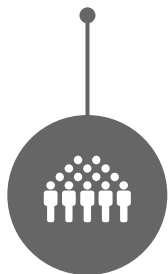
Wine and food is important to multiple travel segments (e.g., Treat Myself; Wine, Food, & Scenery; Shopping; Sports & Events), however it is not a motivation on its own – meaning that it needs to be teamed with something else to motivate people.



Research Method

WellingtonNZ and Destination Wairarapa commissioned Colmar Brunton to undertake this research in 2020.

TARGET AUDIENCE



New Zealanders aged 16+ who are intending to travel domestically.

INTERVIEW DATES



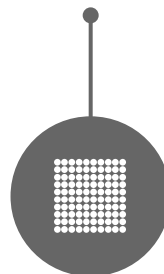
10 to 17 December 2020.

METHOD



Online survey using Colmar Brunton's research panel.

SAMPLE SIZE



1,702 in total*;
421 from the Wellington region, 1,281 from the rest of the country.
The maximum of error on the results from the overall sample is +/-2.4%.

WEIGHTING



Results post-weighted by age, gender, region, and occupation so that the overall results are representative of the total population.

*The sample was structured to boost particular sub-groups in the population (e.g., talented people the Wellington region is trying to attract to the region for work. The results from these sub-groups is presented in a separate report.