PROJECT BACKPACK

Understanding the backpacker mind set and its impact on travel to NZ

BIG PICTURE
JULY 2015
THIS PROJECT INCLUDED SEVERAL KEY BUSINESS QUESTIONS:

1. **WHO ARE BACKPACKERS AND HOW DO THEY TRAVEL?**
   - What are the defining motivations of backpackers to travel?
   - What is it about backpacking that they are attracted to?
   - How do backpackers go about planning a trip?
   - What information do they collect / see / hear and how does this influence their choice of destination?

2. **WHAT DO THEY THINK ABOUT AUSTRALIA & NEW ZEALAND?**
   - What are backpackers’ perceptions of AUS & NZ? Where do these perceptions come from and how does this compare to their experiences when they get here?
   - What are the key triggers and barriers for backpackers travelling to NZ from AUS?
   - What have backpackers heard / seen / taken part in that influences their decision?
   - What are the key touchpoints on a backpacker’s journey that lead them to / away from NZ?

3. **HOW CAN WE ENCOURAGE MORE BACKPACKERS TO COME TO NZ?**
   - What information about NZ do they need to know to be interested and committed to coming over?
   - What could make the idea of NZ more compelling and how can we align this to why they backpack in the first place?
   - When do we need to tell them about NZ for them to consider booking it as part of their trip?
   - How does this story differ from that of Australia?

4. **AND HOW DO WE COMMUNICATE THIS STORY?**
   - What communication channels are most influential / informative for backpackers when planning a trip?
   - Is it social media, travel agents, promotional deals or WOM? What communication medium is most meaningful?
   - Where do we need to tell them this story (in Australia vs. in market before setting off)?
   - Which backpackers are most likely to convert based on our story? Quick wins vs. longer term goals for our targets?

OUR ULTIMATE GOAL WAS TO DETERMINE WHAT WILL DRIVE GREATER INTEREST AND CONVERSION OF BACKPACKERS COMING TO NZ FROM AUSTRALIA.
TO ANSWER OUR OBJECTIVES, WE CONDUCTED QUALITATIVE RESEARCH IN BOTH AUSTRALIA AND NEW ZEALAND

As a means of answering these key business questions, we interviewed the following groups of backpackers...

**AUCKLAND NEW ZEALAND**
11th June, 19th - 23rd June

- **N=4** Focus Groups
  - **N=1** Group Decided on NZ in AUS
  - **N=1** Group Came directly to NZ
  - **N=1** Group Decided on NZ in AUS
  - **N=1** Group Came to NZ via AUS – & always planned to

- **N=4** In Depth Interviews
  - **N=2** Came directly to NZ
  - **N=2** Decided NZ in AUS

**SYDNEY AUSTRALIA**
15th - 17th June

- **N=2** Focus Groups
  - **N=1** Group Considering NZ
  - **N=1** Group Decided against NZ

- **N=4** In Depth Interviews
  - **N=2** Decided Against NZ
  - **N=2** Considering NZ

AT THE CONCLUSION OF OUR FIELDWORK, WE HAD SPOKEN TO A TOTAL OF 56 BACKPACKERS FROM THREE COUNTRIES BOTH IN AUSTRALIA & NEW ZEALAND
Although there are some overall commonalities among backpackers, they are by their very nature unpredictable.

There’s a lot of spontaneity in how they behave and they can be easily swayed to change plans last minute or follow the crowd.

In other words, there are no hard and fast rules when it comes to backpackers.

“I’m keeping my plans flexible because you never know what will happen”
Backpacking often feels like **the last opportunity** to travel before they have ‘life commitments’ that may hold them back or prevent them from travelling in the future.

It is often the first time in their lives where they have **total freedom** from the structure and routine of the ‘real world’.

Many consider it a **rite of passage** – it’s just what people do before entering the world of work and ultimately, adulthood.

"This is the time in my life where I can get up and go – I don’t have a family, I’m single, about to start studies next year and am not working"
THEY’RE FINANCIALLY NAÏVE

Budgeting their travel money is often a challenge they didn’t anticipate as it’s not something many have had to do before!

Trying to adapt to life in a different place that is exciting and new can end up costing them more than they put aside as a travelling budget...

They’re all keen to avoid having to turn to Mum & Dad to bail them out – so quickly learn to adjust their spending

“My advice to other backpackers would be to take however much money you think you need....and double it”
Sociability is a big part of the appeal of travel.

On one hand this is about the opportunity to interact with another culture – by spending time with the locals.

And on the other hand it’s about finding other like-minded travellers as part of the community who they can share their travel journey with.

“One of my main motivations is meeting new people – putting myself out there and making friends along the way.”

The desire to make connections and share their experiences with others is part of the appeal of travel.
For many, travelling is seen as a social responsibility to expose themselves to different ways of life to ensure self development.

Having a social consciousness and autonomy about where, how and why they are travelling is incredibly important and influences the places they go to.

Backpacking is aspirational in that it changes how they see the world...

“I see it as a responsibility to myself and those around me to travel the world and challenge my own view of what is right and wrong”
This is often our travellers first big trip away from their home country

They are going it alone, away from their family, friends and home comforts to see if they can ‘survive’ – challenging themselves to establish whether they sink or swim

Backpacking is often a choice they have made for themselves to invest in their self-discovery.... Wanting to assert some control over their lives

“I’ve set myself a challenge to see if I can do it. My mother didn’t quite believe me when I told her I was going to go. I want to prove to her and myself that I can make money and thrive”
WHICH IS WHY THE HEART OF TRAVEL IS TRUE DISCOVERY

THIS DREAM OF TRUE DISCOVERY THAT BACKPACKERS SEEK WHEN TRAVELLING UNDERPINS WHY THEY BACKPACK AND WHERE THEY CHOOSE TO GO TO FULFIL THESE DESIRES
UNDERSTANDING THE DECISION TO BACKPACK
The term ‘backpacker’ means different things to different people.

It is often used to describe a range of travel approaches.

At a broad level it is a style of travel over an extended period of time where you use a backpack.

More detailed descriptions allude to a state of mind – wanting to move around freely, surviving with the resources you carry.

In any case, it is a temporary state of being & way to travel.

IT WAS A CHALLENGE GETTING DOWN TO A SINGULAR DEFINITION FOR BACKPACKER – BUT THE ASSOCIATIONS THAT FOLLOW ARE BROADLY REPRESENTATIVE OF ALL OF THE DIFFERENT ITERATIONS OF A BACKPACKER.
In exploring the meaning of backpacking, three ‘types’ of travellers emerged.

Distinctions around the different ‘types’ of travel often came down to the length/duration of the trip...

**SHORTER** ↔ **HOLIDAYERS** ↔ **BACKPACKERS** ↔ **MIGRANTS** ↔ **LONGER**

**CORE NEED:**
- **HOLIDAYERS:** RELAXATION
- **BACKPACKERS:** ADVENTURE
- **MIGRANTS:** OPPORTUNITY

**DEFINING ATTITUDES:**
- **HOLIDAYERS:**
  - **NO WORK:** Taking a break from working/busy lives
  - **NO STRESS:** Ultimate aim is to enjoy and have fun
  - **INDULGENCE:** Treating & rewarding oneself, not holding back, doing what they want

- **BACKPACKERS:**
  - **INDEPENDENCE:** Desire to be distanced from home and home comforts
  - **OPENNESS:** Wanting to expose oneself to lots of different, new things
  - **CAREFREE:** Looking to explore new places without constraints

- **MIGRANTS:**
  - **SEEKING CHANGE:** Interest in ‘giving it a go’ somewhere else
  - **BETTERMENT:** Wanting to experience ‘life’ elsewhere for perspective
  - **DEVELOPMENT:** For career progression & upskilling

**WHAT THIS LOOKS LIKE:**
- **HOLIDAYERS**
  - **SET AMOUNT OF TIME:** A long weekend (2-3 days) up to 2 weeks
  - **PLANNED IN ADVANCE:** An organised trip to a specific destination
  - **A BIT SWISH:** Accommodation is typically higher-end, or more than they would normally spend on something like a hotel
  - **SET BUDGET:** Dedicated amount to spend – often saved specifically for the trip

- **BACKPACKERS**
  - **IT’S COMPLICATED... BUT...**
  - **AN EXTENDED PERIOD OF TIME:** Anywhere between 3 months and years to travel
  - **CERTAIN STOPS IN MIND:** Depending on the backpacker, likelihood of key experiences not to miss
  - **START OFF WITH A BUDGET IN MIND:** Depending on circumstances may / may not work

- **MIGRANTS**
  - **LONG TERM:** 2+ years
  - **SKILLED EMPLOYMENT:** Working in full-time, skilled positions with a long-term outlook
  - **INTEGRATED:** Consider themselves ‘part of society’ in the place they live
  - **COMMITTED:** Many aiming for more ‘permanent’ immigration status, e.g., residency and/or possibly even citizenship
BACKPACKERS ROMANTICISE WHAT THEIR BACKPACKING EXPERIENCE WILL BE LIKE

They know what they want (or expect) it to be like, but they’re chasing something that doesn’t actually exist...

THE DREAM = travelling with true abandon

What that dream looks like...

- DO SOMETHING COMPLETELY UNIQUE TO EVERYONE ELSE’S JOURNEY
- ALL ACTIVITIES ARE COMPLETELY THRILLING
- CHALLENGE ONESELF TO SURVIVE WITH LIMITED RESOURCES AND NO HOME COMFORTS
- HAVING TOTAL FLEXIBILITY & FREEDOM TO UNDERSTAND ANOTHER CULTURE
- OPERATING OUTSIDE OF CONVENTION, CHALLENGING OTHERS’ EXPECTATIONS

THE IDEA OF BACKPACKING IS OFTEN AN EXAGGERATED VERSION OF EVENTS
THE REALITY OF BACKPACKING IS NOT AS SEXY...BUT IS JUST AS MUCH FUN

In practice backpackers recognise that they have limits and lines that they are unwilling or uncertain to cross...

THE REALITY = *travelling with SOME abandon*

What that reality looks like...

- **DO SOMETHING COMPLETELY DIFFERENT FOR ME, ALONGSIDE OTHER BACKPACKERS**
- **SOME ACTIVITIES ARE COMPLETELY THRILLING, OTHERS ARE MORE MUNDANE (LIKE WORK!)**
- **NEEDING TO USE SOME HOME COMFORTS AS A MEANS OF SURVIVING**
- **LEVEL OF FLEXIBILITY BUT THERE ARE PRE-PLANNED EVENTS IN PLACE BEFOREHAND**
- **MORE SAFETY CONSCIOUS & SPEND TIME IN BACKPACKER COMMUNITY**

THE REALITY IS SOMETHING MORE CONTAINED, BUT...
“I love the idea of being able to survive on my own, with nothing”

“I wanted to be as far away from home as possible... even if something happened to me down here, it would take days for anyone to come and save me”

“It’s about feeling free from everything”

“I’ve done some crazy things... those are the things you remember because you look back and think ‘did I really do that?’ – they are true travelling moments”

“I’m not even in the same time zone as everyone else that knows me. It does feel liberating”

Although circumstance may keep them rooted in the realities of backpacking, the dream of ‘true discovery’ is what they are thinking of...
Travelling to an English speaking country is a **requirement for all German universities** where teaching or working in English is involved. German travellers have to provide receipts and other forms of evidence to prove they have travelled abroad.

In addition now that the **obligatory military service has been removed**, Germans now have a period of time in life to ‘escape’ which previously was not afforded to them.

For French travellers, spending an extended period of time in an English speaking country, presents an **key opportunity**. It is seen as a **good investment of time** especially for those who want to work for world leading organisations.

Honing their language skills is seen as a **gateway to accessing a ‘better job’** in the future – it widens your horizons for future employment.

British travellers feel that there is a **finite amount of time in their lives** when they will be able to spend the time travelling. It is a self investment because it involves organisation, pre-planning and finances.

Most see it as a **key marker of development and maturity** on their **CV**.

---

**GOING TO AN ENGLISH SPEAKING COUNTRY IS A ‘QUALIFICATION’**

**GOING TO AN ENGLISH SPEAKING COUNTRY IS A LIFE SKILL**

**PERSONAL DEVELOPMENT IS A CV BOOST**
HOW BACKPACKERS TRAVEL
THE TRAVEL JOURNEY FROM A GLANCE...

THINKING ABOUT TRAVEL

WEIGHING UP AMOUNT OF TIME AND MONEY

RESEARCH

BOOKING TICKET

ARRIVE

HOME

WORKING

TRAVELLING IN COUNTRY

ORGANISE KEY EVENTS ON TRIP (IF NOT PRE-BOOKED)
TIME AND MONEY ARE THE FUNCTIONAL STARTING POINTS WHEN IT COMES TO DECIDING ON A TRAVEL DESTINATION

ONE YEAR IS THE INITIAL PLAN
- Backpackers have time after finishing school / uni and before they start working to leave their country and travel
- It’s expected that young people will take at least a year for their ‘OE’ or ‘gap year’ which is the amount of time that most working holiday visas last
- They often only (loosely) plan out the first year, even if they leave their return date open

TRIPS CAN BE LONGER, BUT TYPICALLY AREN’T PLANNED OUT TO BE BEFORE THEY’VE LEFT HOME
- Many backpackers catch the ‘travel bug’ and end up looking for ways to extend their trips past the initial plan

THEY PLAN ON BEING ABLE TO EARN
- There were quite a few backpackers that talked about only having enough money for their flight and a few nights in a hostel before leaving to travel
- While others have enough in the bank for first 2-3 months
- This was largely due to the expectation that they could work for their keep / remaining part of the year

IF WORST COMES TO WORST, THEY HAVE THEIR PARENTS AS A BACK UP OPTION
- Asking for money from home although not desirable, is something backpackers have in case they run short

WHILE THESE ARE INITIAL CONSIDERATIONS, THE VARIABILITY OF THEM MEANS THAT THESE ARE SIMPLY ‘PLANNING TOOLS’ THAT TRAVELLERS ADJUST ONCE THEY DECIDE WHERE THEY’RE GOING
## BACKPACKERS THEN TURN TO FRIENDS, FAMILY AND THE INTERNET FOR RECOMMENDATIONS & IDEAS

### GOOGLING

“*My first port of call was the internet to look at potential destinations*”

- All backpackers turned to the internet when researching where to go (Wikipedia, official tourist websites)
- They turn to travel agent websites for inspiration (itineraries for ideas)
- Some go to blogs for experiences from those who have ‘done it’

### FRIENDS, FAMILY & PEERS

“A friend of mine went travelling last year and she said, you just have to do it”

- They discuss where they are considering with family and friends for ideas and reassurance
- Personal recommendations are very influential
- Having someone that knows you and can verify the trip, makes backpackers feel more secure

### SOCIAL MEDIA

**FACEBOOK/ INSTAGRAM/ PINTEREST**

“I saw amazing pictures on Facebook and it looked too good to miss out on”

- Images & comments posted on social media inspire backpackers
- Instagram and Pinterest allow for ‘groupings’ of images which showcase ‘experiences’, bringing expectations to life

---

**THEY’RE LOOKING TO THESE CHANNELS FOR IDEAS AND ULTIMATELY INSPIRATION. THE POWER OF WOM AND POSITIVE IMAGERY ARE CENTRAL TO BOTH KEEPING THE BACKPACKING DREAM ALIVE AND ALSO REALISTICALLY HELPING THEM CHOOSE THEIR DESTINATION...**
THEY CONSIDER A BACK-UP PLAN EVEN AT THIS STAGE OF THE PLANNING

TRAVELLING COMPANIONS/GROUP TRAVEL
- **REASSURANCE:** Travelling with others and/or as part of a group provides an established network
- **CONFIDENCE:** Not needing to make every decision alone which can be exhausting
- **COMPANIONSHIP:** Ready made relationships, sharing of experiences

FRIENDS/FAMILY CLOSE BY
- **PERSONAL/FAMILIAR CONNECTION:** Existing relationship / history with someone known
- **LOCAL KNOWLEDGE:** Staying with someone who gives insider information
- **FREE:** Available without cost, meaning they can save money for other things!

AN ORGANISATION (LIKE AIFS)
- **FORMAL ARRANGEMENT:** Going with an established organisation like AIFS gives an extra layer of contingency
- **VALUE ADDS:** Provide an arrival pack when first land and ongoing job seeking help throughout time away
- **PAID SUPPORT:** Required to commit to a fee when signing up

WE CANNOT UNDERESTIMATE THE INFLUENCE OF A BACK-UP PLAN – BACKPACKERS FEEL MUCH MORE CONFIDENT KNOWING AHEAD OF TIME THAT THEY HAVE SUPPORT AVAILABLE IF NEEDED
Similarly to an organisation, a travel agent provides reassurance and insurance to inexperienced backpackers.

Seeking out the best fares and booking directly to get the cheapest flights is preferred by more experienced backpackers.

The total end-to-end decision making process typically takes around 2-3 months, and many depart for their travels a couple of weeks after they’ve booked.
SO HOW DO THEY CHOOSE THEIR DESTINATION?
DECISION MAKING ABOUT THEIR TRAVEL DESTINATION COMES DOWN TO SIX KEY VARIABLES

**TANGIBLES**
- Safety & Ease
- Weather & Seasons
- Employment & Affordability

**INTANGIBLES**
- Activities & Experiences
- Culture & People
- Natural Beauty

THE MORE VARIABLES A DESTINATION DELIVERS TO, THE BETTER THEY BELIEVE IT DELIVERS TO ‘TRUE DISCOVERY’
### THE TANGIBLES ARE VARIABLES THAT CAN BE MORE OBJECTIVELY MEASURED, COMPARED & PHYSICALLY EXPERIENCED

<table>
<thead>
<tr>
<th>TANGIBLES</th>
<th>INTANGIBLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAFETY &amp; EASE</td>
<td>ACTIVITIES &amp; EXPERIENCES</td>
</tr>
<tr>
<td>WEATHER &amp; SEASONS</td>
<td>CULTURE &amp; PEOPLE</td>
</tr>
<tr>
<td>EMPLOYMENT &amp; AFFORDABILITY</td>
<td>NATURAL BEAUTY</td>
</tr>
</tbody>
</table>

#### TANGIBLES
- **How safe is where I’m going? How accessible is help if I need it?**
- **How easy is it to get a visa? How quick can I get it?**
- **How easy will it be to get around? E.g. public transport, car hire, etc.**
- **Do they speak the same language?**
- **Will the weather be better than it is at home? Will the sun be shining vs. the pouring rain?**
- **Will I be able to spend time outside / see things?**
- **Will my photos look good? Will I get a tan?**
- **Is travelling there VFM?**
- **How far will my budget stretch? Will I be able to afford to do all of the things I want to do?**
- **How much does it cost for flights? Accommodation? Transport and food?**
- **Will I be able to find work there easily?**

#### INTANGIBLES
- **What can I do whilst I’m there? What can I do that I (or my friends) have never done before?**
- **Will I have authentic / real experiences?**
- **Will I experience things that are special/ unique only to my trip? Will I see & do things no one else before me has done?**
- **Will I experience a different culture to my own?**
- **Will I meet locals?**
- **What is there to see in terms of landscape?**
- **Is there diverse scenery?**
- **How far is it from home? How much distance can I cover?**

---

**For inexperienced backpackers, they start with variables they feel they have the most control over... which in this case are the tangible variables.**
WHEREAS THE INTANGIBLES ARE SUBJECT TO INFLUENCE & PERSONAL OPINION RELATIVE TO WHAT THEY’VE EXPERIENCED PREVIOUSLY

<table>
<thead>
<tr>
<th>TANGIBLES</th>
<th>INTANGIBLES</th>
</tr>
</thead>
<tbody>
<tr>
<td>SAFETY &amp; EASE</td>
<td>ACTIVITIES &amp; EXPERIENCES</td>
</tr>
<tr>
<td>WEATHER &amp; SEASONS</td>
<td>CULTURE &amp; PEOPLE</td>
</tr>
<tr>
<td>EMPLOYMENT &amp; AFFORDABILITY</td>
<td>NATURAL BEAUTY</td>
</tr>
</tbody>
</table>

- **How safe is where I’m going?** How accessible is help if I need it?
- **How easy is it to get a visa?** How quick can I get it?
- **How easy will it be to get around?** E.g. public transport, car hire, etc.
- **Do they speak the same language?**
- **Will the weather be better than it is at home?** Will the sun be shining vs. the rain pouring?
- **Will I be able to spend time outside / see things?**
- **Will my photos look good?** Will I get a tan?
- **Is travelling there VFM?**
- **How far will my budget stretch?** Will I be able to afford to do all of the things I want to do?
- **How much does it cost for flights? accommodation? Transport and food?**
- **Will I be able to find work there easily?**

**WS HY WHEIS TEE TNGBLE ARE SUBJ+C TO INFLUENCE & PERNAL OPINION RELATIVE TO WHAT THEY’VE EXPERIENCED PREVIOUSLY**

- **What can I do whilst I’m there?** What can I do that I (or my friends) have never done before?
- **Will I experience a different culture to my own?**
- **Will I meet locals?**
- **Will I have authentic / real experiences?**
- **Will I experience things that are special/ unique only to my trip?** Will I see & do things no one else before me has done?

**MORE EXPERIENCED BACKPACKERS ON THE OTHER HAND, PLACE GREATER IMPORTANCE ON THE LESS TANGIBLE VARIABLES BECAUSE THEIR PREVIOUS TRAVELS HAVE SHOWN THEM THE VALUE OF SUCH EXPERIENCES**

- **What is there to see in terms of landscape?**
- **Is there diverse scenery?**
- **How far is it from home?** How much distance can I cover?
SO WHAT DOES THIS MEAN FOR AUSTRALIA AND NEW ZEALAND?
LOOKING AT AUSTRALIA
ASSOCIATIONS WITH AUSTRALIA WERE GENERALLY VERY POSITIVE

When we asked our backpackers to tell us what they associated with Australia before they travelled there, almost everything they said was a positive, desirable trait...

These can be organised down into several key areas:

ENDLESS SUMMER  |  EARNING POTENTIAL  |  IT’S FAR AWAY  |  IT’S EASY  |  ADVENTURE  |  NATURE & LANDSCAPES

AUSSIE IS THE ‘IT’ PLACE FOR EUROPEAN BACKPACKERS (AND HAS BEEN FOR AWHILE). IT HAS HIGH WOM & AND ITS COLONIAL TIES MAKE IT FEEL LIKE A SAFE & EASY CHOICE. IT’S ALSO PRETTY MUCH AS FAR AWAY FROM HOME AS THEY CAN GET...
WHAT THEY KNOW ABOUT AUSTRALIA IS COMING LARGELY FROM TV SOAPs, ADVERTS AND FILMS, AND IMPORTANTLY ALSO WOM

HOME & AWAY
CROCODILE DUNDEE

INBETWEENERS
NEIGHBOURS

YOUTUBE
Films

THERE’S A SENSE THAT BACKPACKERS FEEL LIKE THEY ALREADY KNOW AUSTRALIA (AND THAT THEY’LL LIKE IT) BEFORE THEY EVEN GET THERE...
AND SO EXPECTATIONS OF AUSTRALIA ARE PRETTY HIGH BEFORE THEY ARRIVE

TANGIBLES

SAFETY & EASE
- Developed, first world Western nation that speaks English
- It has a reputation for being safe in the media (no conflict, respected policing)
- Visa application takes hours rather than days (!)
- Transport is easy to navigate and signposted

WEATHER & SEASONS
- “Hot, island, sunshine”
- Unconditional warm weather that makes it feel like a “never ending holiday” because it makes you relax
- Cost of living felt to be high but wages are also quite high
- Easy to find work

EMPLOYMENT & AFFORDABILITY
- Known to have a strong economy so GBP / Euros do not go as far
- Anticipation of adrenaline filled activities i.e. skydive, bungee

INTANGIBLES

ACTIVITIES & EXPERIENCES
- Surfing, BBQs, parties and hanging out on beaches
- Adventure central – anticipation of adrenaline filled activities i.e. skydive, bungee

CULTURE & PEOPLE
- Not as clear an idea of what the people will be like except for an overarching feeling they will all be laid back and easy going
- Anticipation of friendliness
- Lots known about backpacker community, less about locals which is a drawback

NATURAL BEAUTY
- Bright blue waters and golden beaches
- Stunning outback – expanse of red dirt and desert
- Perception of being big and vast
- “Cool coastal cities”
- Koalas and kangaroos

WHEN IT COMES TO THE TANGIBLES, BACKPACKERS ANTICIPATE AUSTRALIA WILL DELIVER...AND EVEN ON ITS WEAKEST VARIABLE (‘AFFORDABILITY & EMPLOYMENT’), THEY ANTICIPATE BEING ABLE TO EARN, SO EVEN THAT’S NOT A HUGE ISSUE

AND WHEN IT COMES TO THE INTANGIBLES, THEY ARE EXPECTING TO BE WOWED!!! IF IT’S ANYTHING LIKE THEY’VE SEEN ON TV.....
BEARING THAT IN MIND, HOW DO THEY FIND AUSTRALIA
ONCE THEY’RE ACTUALLY THERE?
MOST BACKPACKERS HAVE AN IDEA OF WHERE THEY WANT TO GO BUT PLAN THEIR ROUTE ONCE THEY’VE ARRIVED

Typically backpackers in Australia have their first nights accommodation organised ahead of time so that they have a base to go to when they first get off their flight...

They arrive into big Australian cities... armed with a bucket list of things they ‘have to see’ to prove they have ‘done it’ properly....

After finding their feet in they have arrived into...their next port of call (if not pre-booked) is to head to a travel agent or hostel to arrange accommodation and figure out what they should do while they’re there.

ALMOST EVERY BACKPACKER WE SPOKE WITH NAMED PETERPANS AS AT LEAST ONE OF THE RESOURCES THEY USED TO BOOK EXPERIENCES & TOURS WHILE IN AUSTRALIA. THEY’RE ALSO USING STA TRAVEL OR TRIP ORGANISERS IN THEIR HOSTELS...

AGENTS LIKE PETERPANS AND STA TRAVEL HAVE REAL INFLUENCE ON TRAVEL ROUTES THROUGH AUSTRALIA (AND BEYOND) FOR BACKPACKERS WHO HAVEN’T COMMITTED TO TRIPS BEFORE LEAVING
The majority of backpackers head to the East Coast following personal or travel agent recommendation...

**MINORITY**

The *more ‘adventurous’ travellers* make it out to the Western Territory, which is *less popular* and *less touristy*.

They tend to *travel in a group* for an element of security but also to keep costs down.

These backpackers tend to *rent a campervan or car* and feel *confident* creating a route that is more *independent*.

**MAJORITY**

The East Coast is a *well known route* that has ‘top sights’ to see... it is considered the most popular—which also means it is ‘touristy’.

*Less experienced* backpackers typically travel the East Coast – which keeps them close to the big Aussie cities, where they expect it’s easiest to find work if they run out of money along the way.

Backpackers who go to the East Coast tend to travel by *long distance buses* that operate down the coast.

But regardless of method of travel, all backpackers talked about big party scenes at all the big cities throughout Australia – it’s status quo to go out to the bar the night you get into a city (and every night thereafter).

**FOR SOME BACKPACKERS, THIS FULFULS THEIR BACKPACKER DREAM. FOR OTHERS, IT’S NOT QUITE ENOUGH...**
AND AUSTRALIA DOES IN FACT LIVE UP TO A LOT OF THEIR EXPECTATIONS...

BEACHES & SUNSHINE
“Chiselled bodies, beers and bikinis”

NZ IMPLICATION: We can’t ‘beat’ Australia when it comes to beaches – which echoes the in-market work we’ve done with Australians....

EARNING MONEY
“I get paid more than I ever have before”

NZ IMPLICATION: How can we talk to the advantages of working in NZ in ways that are more than just about money?

PARTYING
“I don’t feel like I’m working because I go out every night”

NZ IMPLICATION: How can we reinterpret the fun of meeting people, socialising and having a good time so that we have our own version of a Kiwi party?

ADVENTURE
“Australia is so big, you can have adventures getting lost here”

NZ IMPLICATION: The size of Australia makes travelling around feel like an adventure – how can we promote travelling the whole country in NZ as a means of differentiation?

WHEN IT COMES TO HOW NZ TALKS TO THESE IN NZ, IT’S ABOUT CARVING OUT OUR OWN UNIQUE IDENTITY THAT IS RELATED BUT SEPARATE FROM AUSTRALIA – “WE DO IT DIFFERENTLY”
Almost everywhere they went, there were tourists and they explained that getting on and off the tour buses was a bit like sheep herding – lots of tour groups on identical itineraries. In addition to there being tourists everywhere...most of those tourists are backpackers!

Many backpackers were shocked and disappointed to find out that it isn’t actually summer all year round in all of Australia. And for those in the major cities, often the weather ended up being much more ‘seasonal’ than summery in the off-seasons – including cold weather, rain and in some places even snow!

So while wages are high – so is the cost of living...

Everything from food to clothing, the prices in Australia are shocking compared to most of Europe. And that sense of ‘reckless abandon’ they have as travellers often means they’re prone to impulse spending. Money in Australia is very “easy come, easy go”.

The melting pot that is Australia means that there isn’t any sense of what ‘Australian culture’ actually is. And almost no one met a genuine, born & bred Aussie to boot.

It’s also no secret that Australia has marginalised its aboriginal people, which would be a big source of culture.

Backpackers both in Australia and New Zealand echoed the sentiment that Australia isn’t all it’s cracked up to be once they’ve been there for awhile and the ‘honeymoon phase’ has ended....
WHICH OVER TIME FEEDS INTO HOW BACKPACKERS IN AUSTRALIA BEGIN TO SEE THEIR EXPERIENCE

POSITIVES

TANGIBLES

SAFETY & EASE
WEATHER & SEASONS
EMPLOYMENT & AFFORDABILITY

SUNSHINE
EARNING $$

INTANGIBLES

ACTIVITIES & EXPERIENCES
CULTURE & PEOPLE
NATURAL BEAUTY

ADVENTURE
PARTYING
BEACHES

NEGATIVES

INTOLERANT OF BACKPACKERS
NOT ALWAYS HOT
REALLY EXPENSIVE
TOURisty
ONLY FULL OF BACKPACKERS
NO REAL AUSSIES OR AUSSIE CULTURE

LOTS OF RULES & REGULATIONS
EXPLOITED WORKFORCE

SO WHAT IMPACT DID THE ‘REALITY’ OF AUSTRALIA (BOTH GOOD AND BAD) HAVE ON HOW THEY FEEL ABOUT AUSTRALIA TODAY?
EXPERIENCES OF AUSTRALIA ARE NOT NEGATIVE, THEY JUST FEEL DIFFERENT TO WHAT BACKPACKERS WERE ANTICIPATING

- Backpackers anticipate high cost of living and Australia lives up to that expectation
- Not always as easy to find work as they anticipated – though there is work to be found depending on what you’re willing to do

“I knew it would be expensive and to be honest, it has been... there’s no way I could have afforded it without working”

- Distances travelling around Australia are far and more difficult to do on your own
- The laws and regulations esp. for parking are considered strict and prohibitive

- It isn’t hot and sunny all of the time – it rains, is windy and you need a jumper now and then
- Sydney and Melbourne in particular have seasons like all countries, rather than the permanent sunshine expected

- Very different experiences between those who had seen West / Central AUS vs. East Coast alone
- Although Great Barrier Reef and sites of East coast considered beautiful

- Few felt as if they had spent any time with Australians – we heard of almost no ‘authentic’ experiences with the locals...
- Bad impression of treatment of aboriginals
- More competitive and elitist although Australians are friendly

- Surfing, BBQs, parties and hanging out on beaches
- Adventure central – anticipation of adrenaline filled activities e.g. skydive, bungee
AND IT’S NOT UNCOMMON FOR SOME BACKPACKERS TO FIND THEMSELVES STUCK IN THE ‘SYDNEY RUT’

They get trapped in a cycle of ‘working to live’ rather than ‘working to save’

STUCK IN THE SAME PLACE

“I’m now more of a permanent resident at this hostel... it’s been 6 months. This is essentially my home away from home”

SURROUNDED BY THOSE IN THE SAME SITUATION

“You’re surrounded by people in the same situation, doing the same thing, which means there’s always someone around to go out”

ESTABLISHED ROUTINE – HARD TO BREAK

“I would call it a rut. I’m in a cycle, which is proving hard to break. Until I have to physically leave the country I can see myself just carrying on”

SPENDING MONEY, NOT SAVING IT

“The money I earn from working doesn’t last very long. You get into a habit of earning it and then spending it after work on drinking”

... and spending money on having fun to escape the routine of work

WHICH FEELS VERY FAR AWAY FROM THEIR ORIGINAL BACKPACKING DREAM...
BUT ULTIMATELY THEY ALL SPEAK FONDLY OF THEIR TIME IN AUSTRALIA AND ENJOYED IT AS A BACKPACKING DESTINATION...

“The things I have seen will stay with me forever… just stunning”

“There is nowhere in the world like it”

“It really has been the best experience of my life”

“I won’t go back home the same person. I’ll definitely want to do more travelling in the future and if it is half as good as it’s been in Australia, I’ll be happy”
DIVING INTO NEW ZEALAND
WHERE DO THESE ASSOCIATIONS COME FROM?

RUGBY

STA TRAVEL

NEW ZEALAND

100% PURE NEW ZEALAND ADVERTISING

TV SHOWS LIKE FLIGHT OF THE CONCHORDS

LORD OF THE RINGS & THE HOBBIT

AND IMPORTANTLY, THEY’RE ALSO USING THE INTERNET AND THE MANY SITES AND INFOR SOURCES ON THERE. A GOOGLE IMAGE SEARCH CAN BE A WAY THEY DEVELOP ASSOCIATIONS WITH NZ AS MUCH AS ANY OF THE ONES ABOVE...
Feelings toward NZ ranged from non-existent all the way through to positive – there’s not nearly as much awareness of New Zealand before travellers get to this side of the world...

Which can be boiled down into a few key areas:

- **ADVENTURE & OUTDOORS**
- **LUSH, GREEN NATURE**
- **PURITY / UNTouched**
- **PROTECTED CULTURE**
- **INTIMATE & SMALL**
- **ACTION PACKED**
THOSE COMING DIRECTLY TO NZ HAVE SIMILARLY HIGH HOPES AS THEIR PEERS WHO CHOSE AUSTRALIA FIRST

WHAT HAS BROUGHT THEM TO NEW ZEALAND?

- New Zealand has just always been on their bucket list – often these people have had friends or family that have visited and named it a ‘must do’
- And possibly as a result, Australia was not as appealing – and what they have heard about Australia may have then begun to sound like a negative (much bigger, busier, more backpackers)

BECAUSE OF THIS, THEY OFTEN HEAD TO NEW ZEALAND WITH A POSITIVE OUTLOOK ON WHAT IT WILL BE LIKE:

TANGIBLES

- SAFETY & EASE
- WEATHER & SEASONS
- EMPLOYMENT & AFFORDABILITY

INTANGIBLES

- ACTIVITIES & EXPERIENCES
- CULTURE & PEOPLE
- NATURAL BEAUTY

- They feel relatively informed about the weather, anticipating it’s changeable nature so pack accordingly
- They do hope for sunshine – or are less phased by the idea of seasonality
- There’s also a good chance that they’ve planned out or chosen NZ for the winter ski season

- Backpackers who have come direct from market have really positive expectations of what they can discover from NZ
- Their backpacking dream is still in tact and they are not disillusioned based on any previous experiences of Australia
WHILE THOSE WHO DECIDED ON NZ ONCE IN AUSTRALIA DON’T COME WITH SUCH POSITIVE EXPECTATIONS

WHAT HAS BROUGHT THEM TO NEW ZEALAND?

- It’s the closest, The easiest place to go to keep working & travelling
- As they’re already in the Pacific, they often feel that they should at least check it out, particularly in case they never come back to this part of the world

BACKPACKERS COMING FROM AUSTRALIA ARE PRONE TO COMPARATIVELY JUDGE NZ BASED ON THEIR EXPERIENCES IN AUSTRALIA...NEGATIVES CARRY OVER AND THE POSITIVES ARE ASSUMED TO BE NOT QUITE AS GOOD...

TANGIBLES

- SAFETY & EASE
  - There is a strong perception from research and WOM that NZ is cold, wet and miserable
  - For an ‘outdoors’ country it can be off-putting – from what they know about NZ they expect to be outside a lot doing activities, which loses its appeal if you think it’s going to be cold all of the time...

- WEATHER & SEASONS
  - Backpackers know the minimum wage in NZ is less than that of Australia which is a negative
  - Wages are lower but the cost of living is higher, meaning it is more expensive to do the same things

- EMPLOYMENT & AFFORDABILITY

INTANGIBLES

- ACTIVITIES & EXPERIENCES
  - Backpackers come to NZ having had amazing experiences on beaches & in the Outback already
  - Adrenaline fuelled activities have been on offer so it doesn’t feel they’ll be much different

- CULTURE & PEOPLE
- NATURAL BEAUTY

THEIR PERCEPTIONS ARE NOT NEGATIVE, JUST NOT AS GOOD AS THOSE WHO COME DIRECT (BECAUSE THEY ARE RELATIVE TO THEIR TIME IN AUSTRALIA)
AND FOR THOSE NOT COMING TO NZ...WHAT THEY DON’T KNOW ABOUT US KEEPS THEM AWAY

THEM SAY ‘NO’ TO NZ BECAUSE...

**THEY WERE NEVER CONSIDERING IT IN THE FIRST PLACE**

- When booking in their home country they had Australia in mind...and hadn’t even thought of NZ
- They often don’t know anything about NZ – it’s not on their radar....they were never introduced to the idea through friends or family
- And importantly, it never even came up with their travel agent....even those that booked through STA travel
- It was just never part of the plan...which means it wasn’t part of their ‘backpacker dream’ — it wasn’t on the vision board to start and it can sometimes be a tough place to work forward from with a backpacker

“I hadn’t really thought about New Zealand until this discussion. It's just never come up. Now that you mention it why wouldn’t you take a short trip over there”

AN INITIAL LACK OF AWARENESS EXISTS, AND EVEN THOUGH NZ TYPICALLY ALWAYS COMES UP ONCE THEY GET TO AUSTRALIA, ANYTHING THEY’RE TOLD ABOUT IT AT THAT POINT IS THE ‘AUSSIE BACKPACKER’ VERSION OF THE STORY...WHICH LEADS THEM TO DECIDE AGAINST NZ FOR TWO KEY REASONS:

& THEN THEY SAY ‘NO’ TO NZ BECAUSE...

**THEY CHOOSE TO STICK WITH THE ORIGINAL PLAN**

- Too much pre-booked in Australia still to see before they go
- Too much hassle/cost to change any existing plans
- Too little time left in their trip (or so they think)
- They think they don’t have enough money

& THEN THEY SAY ‘NO’ TO NZ BECAUSE...

**AUSTRALIA WAS ENOUGH FOR THEM**

- They have had a great time in Australia and are hesitant to leave
- And they think that we’re similar (or similar enough) that they won’t really be missing anything by skipping us this time

DESPITE DECIDING AGAINST COMING TO NZ NO ONE WE SPOKE WITH WAS ACTIVELY NEGATIVE ABOUT US. THE KEY REASONS FOR SAYING NO COME DOWN TO THEIR ATTITUDE TOWARD THEIR TIME IN AUSTRALIA, AND THE MYTHS THAT EXIST ABOUT TRAVELLING IN NEW ZEALAND...
And are also consistent with what we’ve heard in other research we’ve conducted with Tourism NZ...

1. **YOU NEED TO HAVE A LONG TIME TO TRAVEL**
   Backpackers believe that if they have less than a month to spend there, that there’s not much point in going to New Zealand – there’s this idea that you have to do it all in one go!

2. **YOU NEED TO HAVE A LOT OF MONEY SAVED UP TO MAKE THE TRIP WORTHWHILE**
   There is a perception that experiences and activities (especially high adrenaline sports) in New Zealand are expensive to do so there is no point in going if you do not have the funds to do the ‘bucket list’ stuff, or enough funds to do it all.

3. **IT’S COLD...ALL OF THE TIME**
   For a country that is all about nature and the outdoors, backpackers believe they would spend most of their time in the cold and wet, making the activities less enjoyable.

4. **IT’S DIFFICULT TO FIND WORK (AND WAGES ARE LOWER!)**
   Because of the size of the country, backpackers feel finding work is harder and applying is more competitive...

We need mythbusters to field these perceptions of New Zealand because for many they present small barriers – for backpackers who want an ‘easy life’ we need to package these up so they are more easily overcome.
AND HOW DO THEY FIND NEW ZEALAND ONCE THEY’RE ACTUALLY THERE?
# THERE ARE QUITE A FEW THINGS THEY REALLY LOVE ABOUT NEW ZEALAND

- It’s extremely easy to rent and buy a car in New Zealand – making travelling freely an accessible option
- In addition, there are lots of buses other transport options across the country
- In addition, the distances between locations are shorter than in Australia, and there’s more to see & do both in between the destinations and to see while you’re on the way...

<table>
<thead>
<tr>
<th>EASY TO TRAVEL AROUND</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ADVENTURE</strong></td>
</tr>
<tr>
<td>- Known as the adrenaline capital of the world, backpackers know NZ is the place to go for extreme activities</td>
</tr>
<tr>
<td>- And many feel there’s no better place in the world to do them than here</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>CAN BE WARM &amp; SUNNY</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>CULTURE</strong></td>
</tr>
<tr>
<td>- Backpackers enjoy learning and understanding Kiwi history and heritage</td>
</tr>
<tr>
<td>- The Māori culture is celebrated and embraced, rather than ignored or ostracised, a big positive that NZ has over Australia</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>SKIING</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FRIENDLY &amp; LAID BACK</strong></td>
</tr>
<tr>
<td>- They talk about meeting ‘actual Kiwis’ in NZ – who were all friendly, helpful and keen to chat and show them around – which made the experience feel more authentic and special</td>
</tr>
<tr>
<td>- The laid back attitude of Kiwis was reported to be even stronger here than in Australia – which contributes to good work-life balance…</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>INTERESTING WORK</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>EPIC LANDSCAPES</strong></td>
</tr>
<tr>
<td>- The scenery in NZ is ‘epic’ unique and diverse – even moreso than Australia…we’ve got glaciers, mountains, green pastures, geothermal sites, etc</td>
</tr>
<tr>
<td>- And the fact that they get to experience these landscapes while they drive makes it feel like they’re sightseeing &amp; exploring even when travelling between destinations</td>
</tr>
</tbody>
</table>

- While it can be cold, NZ also has hot summers
- And many backpackers explained their surprise & delight in visiting our beaches
- They’re not ultimately all that dissimilar from the beaches they love back in Australia

- The upside to our cold weather is our snow
- There are quite a few people who come to NZ explicitly to ski our winters, though those generally aren’t backpackers
- That being said, the fact that we have a range of activities that one can do in the winter makes our ‘bad weather’ not so bad after all...

- From dairy farms to fruit picking – we heard quite a few positive stories about work in New Zealand
- Generally speaking, it was the combination of the ‘interesting’ job along with the view from where they were working that made the work feel unique, and actually an extension of their travel experience

---

**IN BACKPACKERS’ OWN WORDS, WE ARE A NICER, FRIENDLIER VERSION OF AUSTRALIA….A SENTIMENT WE NEED TO BUILD ON**
FOR THOSE HAVE DONE THE KIWI EXPERIENCE, IT GOES DOWN A REAL TREAT

“The kiwi experience is the right balance of freedom, safety and fun. As a first time traveller, I’d recommend it to anyone”

- Organised and established route
- Provides safety in numbers as well as a fun backpacker group dynamic on bus
- Easy to opt in and out of activities
- Particularly popular with first time travellers who are backpacking alone and British backpackers
- French backpackers typically travel the country by long distance bus

THE KIWI EXPERIENCE HAS REAL APPEAL FOR FIRST TIME TRAVELLERS BECAUSE IT SPEAKS TO THE EMOTIONAL NEED OF INDEPENDENCE AND CONTROL AS WELL AS PROVIDING SECURITY AND SAFETY
AND FOR THOSE WHO HAVE RENTED A CAR, THEY LOVE THE OPEN ROAD

“The roads in New Zealand are just amazing. Every journey feels like a postcard”

- More experienced travellers tend to choose car rental vs. an organised tour
- Flexibility to travel where, whenever they like is a means of greater control
- Easier for groups of travellers wanting to explore the country together
- Typically more popular with German travellers who feel more comfortable signing up for car rental

ROADTRIPS HAVE APPEAL TOO BECAUSE THEY PROMISE FREEDOM TO ROAM ABOUT THE COUNTRY WHILST ALSO CATERING TO A SMALLER BUDGET
Backpackers did identify some drawbacks to travelling to New Zealand, which confirmed some of their initial considerations about it as a destination.

<table>
<thead>
<tr>
<th>REALLY EXPENSIVE</th>
<th>LOW WAGES</th>
</tr>
</thead>
<tbody>
<tr>
<td>The cost of living in NZ feels much more compared to Australia and other previous destinations backpackers have been to.</td>
<td>Our wages are lower for the same type of work when we compare ourselves to Australia.</td>
</tr>
<tr>
<td>Food, accommodation and transport are key outgoings that begin to build up over time (because they are necessary to survive).</td>
<td>For those who have been paid more than they have ever received back home, it is hard to take a pay cut that feels ‘quite significant’.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>UNEXCITING CITIES</th>
<th>COSTLY ACTIVITIES</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compared to other big cities in Australia, Auckland feels small and very spread out.</td>
<td>Not only are the wages lower, daily living costs higher and the cities unexciting but the things you can do to make the place interesting, are considered too pricey!</td>
</tr>
<tr>
<td>There aren’t as many people or places to go, making the sights feel less significant and less impressive.</td>
<td>Skydiving, bungee jumping etc. are perceived to be very expensive so can be off putting for those with limited funds.</td>
</tr>
<tr>
<td>Fewer bars and clubs to frequent at night also adds to cities feeling very quiet.</td>
<td></td>
</tr>
</tbody>
</table>

**Backpackers can find it hard to sustain travel in NZ over a long period of time.**

**We need to promote the positive experiences backpackers can have in New Zealand as a means of counteracting the negatives – so that they feel they can see the country without feeling financially restricted.**
AND FOR MANY BACKPACKERS, THOSE NEGATIVES START WHEN THEY GET OFF THE PLANE IN AUCKLAND

BEFORE THEY’RE IN THE CITY...

THERE’S NO ‘WOW FACTOR’ WHEN THEY EXIT THE AIRPORT
- They’re expecting to walk out into a scene from Lord of the Rings...and instead they walk out into Mangere...
- It’s not the dramatic, lush greenery backpackers have seen in photos – it feels disappointing as a first impression

THE AIRPORT-CITY COMMUTE IS EXPENSIVE
- A backpacker may not know the easiest way to get to the city – and taking anything but the AirBus is exceptionally expensive (even to New Zealanders!)
- And even the AirBus feels expensive when compared to Sydney transport (which is half of the cost)
- And ultimately, there’s no other options.....there’s not a train they could take even if they wanted!
- This can put an bad taste in their mouth – and instantly start to reinforce their negative perceptions around NZ’s affordability

AND THEN ONCE THEY’RE HERE...

IT’S A FAR CRY FROM WHERE THEY JUST WERE
- Auckland feels small and uninspiring – especially when they’ve just come from Sydney
- It feels much harder to get around because the transport system is not as well connected (it is also much more expensive)

THERE’S NOTHING TO DO
- There’s a feeling that Auckland does not have an equivalent amount of things to do as in Aussie’s cities
- They only really know about the SkyTower and Art Gallery, and maybe Mt. Eden...
- And even though they may visit places like Piha, from a backpacker perspective that’s is generally not considered ‘part of Auckland’

AND NO NIGHTLIFE/PARTY ATMOSPHERE
- Complaints about there being “no good clubs” and no real party scene here
- And they think that Queen Street is pretty much the whole city – few have ventured out further than the Viaduct
- Almost no backpackers in Auckland were even aware of areas like Kingsland, Ponsonby, and even Britomart!

WE NEED TO WORK TO IMPROVE THE ARRIVAL EXPERIENCE FOR BACKPACKERS INTO AUCKLAND SO THAT THEY SET OFF INTO THE COUNTRY WITH A POSITIVE FIRST IMPRESSION...ULTIMATELY, THIS COULD ACTUALLY MEAN GETTING THEM ‘OUT OF AUCKLAND’ AS QUICKLY AS POSSIBLE
JUST LIKE AUSTRALIA, OUR PROS AND CONS INFLUENCE HOW BACKPACKERS ULTIMATELY FEEL ABOUT US...

CAME DIRECTLY TO NZ
- SAFETY & EASE
- WEATHER & SEASONS
- EMPLOYMENT & AFFORDABILITY
- ACTIVITIES & EXPERIENCES
- CULTURE & PEOPLE
- NATURAL BEAUTY

DECIDED ON NZ ONCE IN AUS
- SAFETY & EASE
- WEATHER & SEASONS
- EMPLOYMENT & AFFORDABILITY
- ACTIVITIES & EXPERIENCES
- CULTURE & PEOPLE
- NATURAL BEAUTY

<table>
<thead>
<tr>
<th>POSITIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>EASY TO TRAVEL ROUND</td>
</tr>
<tr>
<td>CAN BE SUNNY AND WARM</td>
</tr>
<tr>
<td>INTERESTING WORK WHEN FOUND</td>
</tr>
<tr>
<td>ADVENTURE</td>
</tr>
<tr>
<td>CULTURE (MĀORI)</td>
</tr>
<tr>
<td>EPIC LANDSCAPES</td>
</tr>
<tr>
<td>YOU CAN GO SKIING</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>NEGATIVES</th>
</tr>
</thead>
<tbody>
<tr>
<td>COLDER THAN AUSTRALIA</td>
</tr>
<tr>
<td>MORE EXPENSIVE THAN AUS</td>
</tr>
<tr>
<td>UNEXCITING CITIES</td>
</tr>
</tbody>
</table>

SO HOW DID WE DO??

SAFETY & EASE
WEATHER & SEASONS
EMPLOYMENT & AFFORDABILITY
CULTURE & PEOPLE
NATURAL BEAUTY
ONCE THEY ARRIVE & SPEND SOME TIME IN NEW ZEALAND, ASSOCIATIONS BEGIN TO CHANGE & GROW FOR THE BETTER...

**TANGIBLES**

- **SAFETY & EASE**
  - Long distance buses, the Kiwi experience and/or renting a car are easier to do than expected – particularly compared to AUS.
  - The cost is higher BUT for the independence gained, experiences are positive.

- **WEATHER & SEASONS**
  - “It is what it is... Winter is just colder than the rest of the year”
  - For those who come from AUS, the weather is not as bad as they think.
  - For those that come from home it is as expected.

- **EMPLOYMENT & AFFORDABILITY**
  - Costs are more than what backpackers thought for food and drink.
  - Even though they assumed it would be hard to find work than AUS, many still struggle.

**INTANGIBLES**

- **ACTIVITIES & EXPERIENCES**
  - “In Queenstown there is so much to do. There are so many possibilities”
  - More adventure and excitement than expecting esp. sporty activities.
  - There is more to explore and to go see than expected.

- **CULTURE & PEOPLE**
  - The local Kiwis are really friendly. Backpackers feel that they have more contact with locals, making the experience more authentic.
  - Their desire to engage with a different culture is realised.

- **NATURAL BEAUTY**
  - The landscapes and scenery are just amazing and better than they expect.
  - Diversity of landscapes means it feels very different / never boring.
  - As many if not more “OMG ... look at that moments” as AUS.

**FOR THE TANGIBLES, BACKPACKERS TRAVELLING AROUND NEW ZEALAND FIND IT EASY AND SAFE HOWEVER, FROM THEIR EXPERIENCES THEY FIND WORKING & SPENDING TO BE MORE TIME & COST INTENSIVE....**

**... WHEN IT COMES TO THE INTANGIBLES NZ PERFORMS BEYOND BACKPACKERS EXPECTATIONS BECAUSE THERE IS AN AUTHENTICITY AND UNIQUENESS TO THE EXPERIENCE WHICH THEY EITHER DID NOT HAVE IN AUSTRALIA OR COULD NOT IMAGINE BACK HOME**
BUT REGARDLESS OF INITIAL THOUGHTS, EXPERIENCES OF NEW ZEALAND FOR ALL ARE BETTER THAN EXPECTED

AND HOW DO FINAL PERCEPTIONS OF AUSTRALIA AND NEW ZEALAND COMPARE?
BOTH NEW ZEALAND AND AUSTRALIA ARE WELL LOVED BY BACKPACKERS AND PERFORM EQUALLY BUT THERE IS A KEY POINT OF DIFFERENTIATION...

AT A BROAD LEVEL AUSTRALIA AND NEW ZEALAND BALANCE OUT WHEN IT COMES TO THE TANGIBLES

NZ PERFORMS BETTER OVERALL ON INTANGIBLE VARIABLES, APPEALING TO A GREATER SENSE OF TRUE DISCOVERY
RECOMMENDATIONS

SO WHAT DOES IT ALL MEAN?
ULTIMATELY, WE’VE GOT A GREAT PRODUCT!

When it comes to how well we’re delivering to those factors in our control...we’re doing great...and the positive words of backpackers express that...

“NZ has a different feel to it – it’s more relaxed”

“I’ve learnt so much about the Maori and the culture here – that has been a really special experience”

“I’ve taken thousands of photos to try and remember it all”

“I thought the scenery couldn’t get better when I left Australia but I was wrong!”

“I’m not the same person who left home”

“The views are breath taking. There is no other way to describe it”

NZ HAS QUALITIES THAT SUIT BACKPACKERS AND OFTEN SUPERSEDES EXPECTATIONS – IT IS JUST A CASE OF GETTING THEM TO COMMIT TO COMING...
BUT AUSTRALIA IS GREAT TOO...AND WE DON’T THINK IT’S A CASE OF MAKING BACKPACKERS CHOOSE

There’s room for Australia and New Zealand to work together more closely to increase backpacker numbers in both countries...

WE SHOULD ACKNOWLEDGE THE SIMILARITIES

There’s no denying that New Zealand and Australia share a lot of similarities, and this can work to our advantage, particularly our proximity to one another!

*We can use backpacker familiarity with Australia to highlight that NZ will be ‘just as easy as AUS’*

AND CELEBRATE THE DIFFERENCES

Trying to directly measure what one country has that the other one doesn’t – we end up highlighting the negatives of both places...

*Instead we think it’s important to showcase and highlight the differences – and tapping into how each place uniquely delivers to the truths they’re after...*

There is space for us to leverage our proximity to Australia more so that we are working with them, rather than competing against them (which isn’t a fair fight)

CAN WE CONSIDER PROMOTING MORE DUAL-DESTINATION TRIPS WITH OUR TRAVEL PARTNERS?