Destination Rotorua Tourism Marketing

Business Plan
2011-2012
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Rotorua 2011

1. Executive Summary

Tourism is one of the most vital industries in New Zealand’s economy contributing almost 9% of New Zealand’s gross domestic product, with 1 in every 10 New Zealanders being dependent on tourism directly or indirectly.*

As such tourism is one of the most important industries for Rotorua and in turn Rotorua is one of New Zealand’s most iconic destinations. The visitor industry is estimated to account for 25% of total employment and 13% of the city’s GDP. The tourism sector plays a key role in underwriting some of Rotorua’s amenity by subsidising or sustaining some of the things that contribute to the well being of residents. For example, visitors contribute directly to the operation and maintenance of several essential publicly provided services, e.g. the museum, airport, and stadiums etc, all of which receive significant public subsidies. Visitors also contribute indirectly to the development, operation and maintenance of a wide variety of public sector initiatives through the additional business activity they generate in Rotorua, a reasonable percentage of which enters the public purse through a variety of central government taxes (e.g. GST, income tax, company tax) as well as local body charges, such as rates.

The largest sector is accommodation followed closely by attractions and activities. Collectively there are over 400 businesses that make up the Rotorua tourism industry in addition to hundreds of retail, service, and souvenir etc businesses that identify themselves as part of the tourism product delivery and offer. For the short and long term, tourism will continue to play an important part in the Rotorua economy and due attention and focus needs to be placed on it for the future health of the region.

The Rotorua District Council currently spends 6% of its economic development budget on tourism as a result. In addition to the development of tourism as a key sector the Rotorua District Council has a central role to play in the development of Rotorua’s tourism economy as public goods and services such as essential infrastructure, attractiveness of CBD, public spaces, parks and public transport are a critical component of the visitor experience e.g. making the public sector the single largest investor in visitor infrastructure and directly responsible for the development and maintenance of these things.

There are multiple providers of tourism product and services in Rotorua and many of these have been established for over 30 years. New facilities and attractions such as the EEC events centre, Shweeb and investment in existing attractions and services have helped keep Rotorua product ‘current’ in an increasingly competitive market.

There are challenges around air capacity for access with the majority of visitation relying on road transport, particularly from Auckland. The tragedy that has unfolded in Christchurch has put a number of partnership plans for greater air access on hold for the short to medium term and Rotorua must work hard as a region to seek greater air access, linkages to other destinations such as Queenstown and quality of services in the form of jet services to take advantage of markets that require those services for travel.

Rotorua must have a strategic direction for tourism to ensure the continued growth and health of this sector and contribution to Rotorua’s economic well being. The tourism sector offers significant opportunity and Rotorua must be positioned to realize this.
Looking forward the tourism sector in Rotorua has significant room for growth and the ability to contribute and add value to Rotorua’s economic, social and cultural objectives.

Integration and recognition of the role that tourism plays for the greater well being of Rotorua is evidenced in the Rotorua Economic Growth Strategy and as such there are three key actions to deliver tourism success:

- A Tourism Business Plan
- The execution of a compelling brand identity for Rotorua
- A regional Events Plan

This document encompasses the first 2 action requirements.

*↑Tourism Strategy Group, Tourism Satellite Account
1.1 Role of Destination Rotorua Tourism Marketing

Rotorua has an explicit structure for strategic planning and implementation to deliver economic objectives through tourism. It is the role of the Rotorua Tourism Committee (TC) to provide strategic guidance, to set out, and direct the strategic framework for delivery of the regions short and long-term goals.

The current organisation that is Destination Rotorua Tourism Marketing (DRTM) is the implementation vehicle in the development and deployment of sales and marketing tactics that align to and deliver the strategic framework as set out by the Tourism Committee. It is proposed that as the core impact of a successful tourism strategy is a thriving local economy the DRTM will expand to encompass more of a holistic economic mandate and become Destination Rotorua Marketing (DRM). DRM will hold at its core a focus on tourism but will also have a strong contribution to the marketing of Rotorua as place to not only visit but also to live, work and invest in.

Both the Tourism Committee and DRM are fundamental in achieving the goals that dictate success for Rotorua to become, and stay, the heart of New Zealand’s tourism offering.

The long-term tourism goals for Rotorua as set by the Tourism Committee are:

- Be the Number One tourism destination in New Zealand
- Grow faster than the market average for Visitor Numbers, Stay and Spend
- Focus on Key Markets and Visitor Segments to be 60% International & 40% Domestic by 2020
- Attract investment Growth by Iwi, Industry, and infrastructure owners
- Be a significant employer of higher value jobs
- Be a centre of Excellence for Tourism Industry

1.2 Current situation

Measures of success will be based around the core fundamental metrics of tourism, these being:

1. Share of visitor market – national basis
2. Visitor nights – and types of accommodation
3. Spend – domestic and international visitors

For the purposes of the 2011/2012 plan growth assumptions and activity plans have been predicated on the following statistical baselines.

Total Visitor Activity

Rotorua had approximately a 3.5% market share of visitor activity occurring nationwide for the 2010 year. Rotorua’s 3.3% market share of visitor nights was less than the 4.4% market share of overnight visitors, because the 2.23 night length of stay by overnight visitors in Rotorua was less than the 3.00 night New Zealand benchmark. Rotorua’s below average length of stay was driven by international visitors short length of stay in Rotorua (2.14 nights), which was approximately half the 4.10 night New Zealand benchmark length of stay for international visitors in other regions.
Annual visitor expenditure in Rotorua was estimated at $551 million for the year ending December 2010, which was a 3.6% share of the $15.2 billion visitor expenditure in New Zealand. The domestic market ($295m) contributed more to Rotorua’s visitor expenditure than the international market ($256 million). However the international market has greater growth potential than the domestic market, because the average daily expenditure of Rotorua’s international visitors ($162 per day) is almost twice the value of Rotorua’s domestic visitors ($84 per day) and also considerably exceeds the New Zealand benchmark for international visitors in other regions ($119 per day).

Domestic visitors contribute considerably more visitor days to the Rotorua RTO region than international visitors. Over the six years to December 2010 the visitor days spent in Rotorua RTO region have grown by 208,000 days, however the split between domestic (69%) and international (31%) markets has remained largely unchanged.
The visitor activity in Rotorua RTO region is forecast for increased growth of 7% from 5.11 million visitor days in the 2010 year to 5.49 million days in the 2016 year. During this period the domestic market is forecast to have marginal growth (+1%), while the international market is forecast to have 22% growth with growth occurring in both visitor nights (up 308,000 nights) and day visitors (up 37,000 visits).

Commercial Accommodation Sector

Rotorua had a 5.5% market share of the 32.2 million visitor nights spent in commercial accommodation nationwide for the 2010 year. Rotorua’s 5.5% market share of visitor
nights was less than the 6.1% market share of visitor arrivals, because the 1.74 night length of stay by visitors in Rotorua commercial accommodation was less than the 1.93 night New Zealand benchmark. Rotorua’s below average length of stay was a result of all but the holiday park sector having a length of stay approximately 0.2 nights below the sector specific NZ benchmark length of stay.

<table>
<thead>
<tr>
<th>Measure</th>
<th>Hotel</th>
<th>Motel</th>
<th>Holiday Park</th>
<th>Backpackers</th>
<th>Total</th>
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<tbody>
<tr>
<td>Visitor Arrivals</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,014,415</td>
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<tr>
<td>Rotorua Market Share</td>
<td>456,581</td>
<td>330,345</td>
<td>126,852</td>
<td>100,636</td>
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<tr>
<td>NZ Benchmark</td>
<td>1.89</td>
<td>1.66</td>
<td>2.19</td>
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<td>1.74</td>
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<tr>
<td>Visitor Nights</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,760,428</td>
</tr>
<tr>
<td>Rotorua Market Share</td>
<td>750,213</td>
<td>549,912</td>
<td>278,287</td>
<td>183,968</td>
<td></td>
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<tr>
<td>Domestic Visitor Nights</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>925,802</td>
</tr>
<tr>
<td>Rotorua Market Share</td>
<td>6.7%</td>
<td>5.4%</td>
<td>4.4%</td>
<td>4.1%</td>
<td>5.5%</td>
</tr>
<tr>
<td>International Visitor Nights</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>834,631</td>
</tr>
<tr>
<td>Rotorua Market Share</td>
<td>13.4 million International Nights</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Domestic Nights</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rotorua Market Share</td>
<td>18.8 million Domestic Nights</td>
<td></td>
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</tbody>
</table>

The domestic market (925,802 visitor nights) contributed more activity to Rotorua’s commercial accommodation sector than the international market (834,631 visitor nights). However Rotorua had a greater share of the international visitor nights (6.2% share) spent in New Zealand than it did of domestic visitor nights (4.9% share).

The volume of visitor nights spent at Rotorua commercial accommodation is approximately evenly split between the domestic and international markets. Visitor nights spent in Rotorua’s commercial accommodation have declined by 8.5% in the six years to December 2010. During this period the domestic market has remained almost static losing only 6,000 visitor nights, while the international market has lost 159,000 visitor nights. Overall the decline in international visitor nights has driven the shift in proportion of visitor nights between international and domestic markets.
There is a seasonal pattern in visitor nights spent at Rotorua commercial accommodation where peaks occur in the summer months of December through February and troughs in the winter months of May through September. Approximately twice the volume of activity occurs during the peak season months as occurs during the low season months. The seasonally adjusted visitor nights have declined from 160,000 visitor nights per month in the last quarter of 2004 to 147,000 visitor nights per month in the last quarter of 2010.

Commercial Attractions Sector

There were 2.0 million visits to Rotorua’s Attraction Monitor sites for the 2010 year, which is a 15.8% decline over the 2004 year. During the six years to December 2010 there has been decreased growth in all domestic markets. By contrast for the same period there has been increased growth in a handful of international markets.
### Rotorua Commercial Attraction Site Visitor Activity

(Source: APR Consultants Rotorua Attraction Monitor)

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<tbody>
<tr>
<td>Domestic</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Auckland</td>
<td>299,087</td>
<td>224,925</td>
<td>219,496</td>
<td>225,290</td>
<td>-24.7%</td>
</tr>
<tr>
<td>Rotorua</td>
<td>259,373</td>
<td>162,364</td>
<td>172,154</td>
<td>173,612</td>
<td>-33.3%</td>
</tr>
<tr>
<td>BOP (excl. Rotorua)</td>
<td>46,940</td>
<td>31,135</td>
<td>31,937</td>
<td>38,142</td>
<td>-18.7%</td>
</tr>
<tr>
<td>Waikato</td>
<td>42,580</td>
<td>25,171</td>
<td>22,904</td>
<td>30,904</td>
<td>-27.4%</td>
</tr>
<tr>
<td>Wellington</td>
<td>34,795</td>
<td>23,514</td>
<td>23,192</td>
<td>29,318</td>
<td>-15.7%</td>
</tr>
<tr>
<td>Other North Island</td>
<td>121,172</td>
<td>134,173</td>
<td>93,369</td>
<td>79,366</td>
<td>-34.5%</td>
</tr>
<tr>
<td>South Island</td>
<td>15,043</td>
<td>12,550</td>
<td>12,293</td>
<td>11,660</td>
<td>-27.3%</td>
</tr>
<tr>
<td>International</td>
<td>1,554,963</td>
<td>1,523,332</td>
<td>1,403,686</td>
<td>1,411,183</td>
<td>-9.2%</td>
</tr>
<tr>
<td>Australia</td>
<td>244,457</td>
<td>220,422</td>
<td>220,777</td>
<td>247,262</td>
<td>+1.1%</td>
</tr>
<tr>
<td>China/Hong Kong</td>
<td>114,837</td>
<td>147,574</td>
<td>182,684</td>
<td>248,265</td>
<td>+116.2%</td>
</tr>
<tr>
<td>Korea</td>
<td>237,334</td>
<td>248,157</td>
<td>170,789</td>
<td>165,745</td>
<td>-30.2%</td>
</tr>
<tr>
<td>Japan</td>
<td>146,356</td>
<td>117,800</td>
<td>88,710</td>
<td>61,833</td>
<td>-57.8%</td>
</tr>
<tr>
<td>Other Asia</td>
<td>95,785</td>
<td>93,402</td>
<td>85,463</td>
<td>109,435</td>
<td>+14.3%</td>
</tr>
<tr>
<td>UK/Ireland</td>
<td>254,100</td>
<td>218,567</td>
<td>192,149</td>
<td>148,697</td>
<td>-41.5%</td>
</tr>
<tr>
<td>Germany</td>
<td>64,795</td>
<td>56,757</td>
<td>58,315</td>
<td>50,085</td>
<td>-22.7%</td>
</tr>
<tr>
<td>Other Europe</td>
<td>145,797</td>
<td>132,809</td>
<td>130,579</td>
<td>151,792</td>
<td>+4.1%</td>
</tr>
<tr>
<td>USA/Canada</td>
<td>142,230</td>
<td>148,903</td>
<td>125,666</td>
<td>95,801</td>
<td>-32.6%</td>
</tr>
<tr>
<td>Other International</td>
<td>109,272</td>
<td>139,541</td>
<td>148,554</td>
<td>137,268</td>
<td>+21.0%</td>
</tr>
<tr>
<td><strong>Total</strong></td>
<td>2,374,953</td>
<td>2,137,764</td>
<td>1,978,951</td>
<td>1,998,875</td>
<td>-15.8%</td>
</tr>
</tbody>
</table>

International visitors contribute considerably more activity to Rotorua’s Attraction Monitor sites than domestic visitors. Over the six years to December 2010 the Rotorua Attraction Monitor sites have become increasingly more dependent on the international market, moving from 65.4% of total attraction visits being international in the 2004 year to 70.6% of total attraction visits being international in the 2010 year.

There is a seasonal pattern in visits to Rotorua Attraction Monitor sites where peaks occur in the summer months of December through February and troughs in the winter months of May through September. Approximately twice the volume of activity occurs during the peak season months as occurs during the low season months. The seasonally adjusted attraction visits have declined from 188,000 visits per month in the last quarter of 2004 to 165,000 visits per month in the last quarter of 2010.
1.3 Market Specifics

The core markets for tourism for Rotorua are shared by most destinations in New Zealand. The performance and opportunity for each for Rotorua is summarised below.

**Domestic**

The greatest domestic travelers to Rotorua are Aucklanders with 1.3m visitor days. Primarily reasons for travel include; events, hosting international visiting friends and relations (VFR), new immigrants as first time ‘international’ visitors and general holidays. The next largest groups of domestic visitors comes form Rotorua’s backyard of the Bay of Plenty and Waikato with 1.5m visitor days across the two regions. Wellington with 200,000 visitor days is a close fourth. All other New Zealanders contribute 500,000 visitor days to the Rotorua region. The biggest opportunity is to convert day visitors into overnight visitors and to extend the length of stay for existing overnight visitors.

**Australia**

The Australian visitor market boom seen over the last 2 years is expected to wane in part due to the high AUD/USD and low cost air linkages increasing the appeal of typically expensive international destinations and the increasing appeal for Australians to holiday at home and keep their dollars within local economies following the Queensland floods. This is seen in the Australian holiday arrivals to NZ up 20% for YE Dec 2009 over 2008, but only up 1% for 2010 over 2009.

Rotorua’s market share is 237,000 visitors or 31% of AUS arrivals to North Island Airports. Of the 237,000 Australian visitors to Rotorua 5,400 (2%) arrived by Rotorua International Airport. Rotorua’s main direct competition for ‘scenic leisure holidays’ is the South Island and Tasmania. Key Australian statistics are:

**Australian Arrivals to NZ – YE Dec 10**
- 461,023  +1%  Holiday
- 413,662  +1%  VFR
- 155,053  +8%  Other
Australian Activity in Rotorua - to year end December 2010

- 335,000 visitor nights (i.e.: 181,000 overnight visitors with a 1.8 night average length of stay)
- 56,000 day visitors
- 391,000 visitor days

China Korea and India

China presents the greatest short term volume potential for international visitors with growth of visitors to New Zealand from China sitting at +20% Year on Year to end of December 2010. This is expected to grow further with the commencement of Southern China flights from April 2011. China has rapidly growing populations of affluent middle class with the propensity to travel internationally and increasing capacity and air linkages to New Zealand.

Korea is a mature market for New Zealand and well into a recovery period following market structural changes. The Korean market has moved from group travel, although this is still a large part of the total Korean numbers, to more FIT travelers who want to engage in the locations they visit.

The growing Indian visitor market will be interesting to gauge as much travel is around overcoming seasonal issues i.e.: monsoon travel. The Indian visitor is a more reserved engager but shows promise over time, if purely from a sheer population perspective.

The caveat for growth in the above markets is the high destination management cost to deliver tourism product and this flows down to product being ‘international ready. This pertains to everything from coach parking to pedestrian management, then to suitable restaurants, buying consortiums for souvenir shops, attraction crowding and capacity through to cultural awareness and wider impacts such as driving skills. There are however markets, particularly China, that have been well insulated from the global economic crisis and continue to have double-digit domestic growth.

MARKET SIZE AND SHARE

CHINA Arrivals to NZ – YE Dec 10
82,151  +26%  Holiday
18,841  +15%  VFR
21,720  +5%  Other
122,712  +20%  TOTAL

- Rotorua market share is 74,000 visitors or 60% of Chinese arrivals to New Zealand

KOREA Arrivals to NZ – YE Dec 10
41,105  +44%  Holiday
12,635  +11%  VFR
13,569  +5%  Other
67,309  +27%  TOTAL

- Rotorua market share is 60,000 visitors or 90% of Korean arrivals to New Zealand
INDIA Arrivals to NZ – YE Dec 10
14,227 +18% Holiday
7,952 +16% VFR
7,307 +14% Other
29,486 +16% Total

- Rotorua market share unknown

South East Asia, Taiwan & Hong Kong

The markets of South East Asia including Thailand, Taiwan and Hong Kong have good potential over time even though they are individually smaller markets. The move of some substitution of manufacturing from China going to South East Asia which will result in increasing affluence of middle class in these countries and their propensity to travel is driven very much from aspirational experiences – so positioning of Rotorua’s natural beauty is critical. Currently these markets are highly dependent on series groups and local government delegations, but there is an increasing number of FITs.

MARKET SIZE AND SHARE

Arrivals to NZ – YE Dec 10
29,486 +2% Singapore
24,287 +3% Hong Kong
22,843 +9% Malaysia
21,434 +9% Thailand
21,192 +28% Taiwan

- Rotorua market share unknown

Japan

There is poor potential for the foreseeable future for Japan with the gloomy economic outlook compounded in short to medium term by earthquake, tsunami and nuclear disasters. Add to this the nature of Japanese to not celebrate, spend money or travel in times of mourning the next 24 months are not positive for inbound tourism. It has to be said however that Japan is trying to encourage its population to travel and spend money to aid in the recovery process. Japan will bounce back and with strong trade and education links to New Zealand it is important to remain in the marketplace and nurture relationships for this eventuality. The Japanese traveling market has a wide variety of visitor types spanning all age groups and lifestyles and is often dual destination appeal with Australia. There are however some ongoing challenges around air linkages and the high NZ$.

MARKET SIZE AND SHARE

JAPAN Arrivals to NZ – YE Dec 10
63,042 +12% Holiday
8,322 -1% VFR
16,371 +21% Other
87,735 +12% TOTAL

- Rotorua market share is 23,000 visitors or 26% of Japanese arrivals to New Zealand
UK and Europe

The United Kingdom and Europe remain in the grips of the global economic crisis for the short to medium term and there is a gloomy mid term economic outlook for both the UK and most of Europe. In saying that the UK is the 2nd largest international market with strong historic links to New Zealand and this makes it important to remain in the marketplace and maintain a presence. The European markets have a wide variety of visitor types spanning all age groups and lifestyles and excellent opportunities for VFR related repeat visitors. Again due to the tyranny of distance New Zealand is often a dual destination with Australia. The high value of NZ$ is again impacting these travelers from a value for money destination.

MARKET SIZE AND SHARE

UK Arrivals to NZ – YE Dec 10
110,386 -11% Holiday
104,182 -9% VFR
10,211 -0% Other
234,314 -9% TOTAL

- Rotorua market share is 106,000 visitors or 45% of UK arrivals to New Zealand

GERMAN Arrivals to NZ – YE Dec 10
45,331 0% Holiday
8,518 -9% VFR
10,799 +11% Other
64,648 0% TOTAL

- Rotorua market share is 40,000 visitors or 62% of German arrivals to New Zealand

Other EUR Arrivals to NZ – YE Dec 10
158,063 -2% TOTAL

- Rotorua market share is 87,000 visitors or 55% of Other European arrivals to New Zealand

United States

The United States has been a relatively stable market with little growth over the last 5 years. It is however the 3rd largest international market and a very good market albeit with very narrow potential for growth in the short term. The US has large populations of high net worth individuals moderated by devalued net worth following the global economic crisis. The economic indicators of recovery might increase propensity for international travel and there are direct air access via multiple airlines and new routes coming online with direct flights from Houston to Auckland in 2011.

There is an Australian dual-destination travel appeal and there is a high reliance on Qantas by series groups from America. Of particular interest for Rotorua is the well disposed cruise market. ‘Cruising’ is an appealing means of travel for Americans as it effectively gives them the safety and security of ‘not leaving’ the comfort of home whilst visiting foreign destinations. It is also an easy and cost effective way to visit
multiple New Zealand regions allowing day trips to the likes of Rotorua from Auckland and Tauranga.

USA Arrivals to NZ – YE Dec 10

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<thead>
<tr>
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<tbody>
<tr>
<td></td>
<td>Holiday</td>
<td>VFR</td>
</tr>
<tr>
<td>----------------</td>
<td>---------</td>
<td>-----</td>
</tr>
<tr>
<td>110,057</td>
<td>-10%</td>
<td>41,175</td>
</tr>
<tr>
<td>189,709</td>
<td>-4%</td>
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- Rotorua market share is 67,000 visitors or 35% of USA arrivals to New Zealand

CANADIAN Arrivals to NZ – YE Dec 10

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<tbody>
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<td>Holiday</td>
<td>VFR</td>
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<td>27,420</td>
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<td>48,942</td>
<td>+1%</td>
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</tbody>
</table>

- Rotorua market share unknown

Emerging markets – Brazil and the Middle East

Tourism New Zealand has started to focus resources on the emerging markets of Brazil, Argentina and Chile (22,000 arrivals). These markets have an established middle class with increasing propensity for international leisure travel. The opportunity is to work with and leverage off Enterprise NZ, Fonterra and other trade linkages and TNZ as these markets grow.

The Middle East (12,100 arrivals) and Russia/Eastern Europe (10,000 arrivals) are currently small traveler markets of extremely wealthy individuals. There is a high expectation from these visitors and this requires high end relationship marketing to meet specific customised needs of individual visitors/groups. A perfect fit for Rotorua’s boutique and luxury operators.

1.4 SWOT and critical success factors

Rotorua’s strength and weaknesses as a visitor destination have been relatively consistently reported in research and studies over the last 10 years. Whilst there has been some variation in qualitative parameters these can be summarised below.

Strengths and Weaknesses

The four key strengths identified for the Rotorua as they pertain to tourism are:

1. Natural landscape and scenery
2. Geothermal features
3. Maori culture concentration
4. Variety of attractions

In addition to these strengths Rotorua also has an excellent infrastructure in public works that has been built to sustain growth in tourism. This can be seen in venues such as the EEC. In the short term this most certainly positions Rotorua as a prime destination for world-class events. The proof will be in Rotorua’s ability to optimize this
and position itself as the pre-eminent destination for events as this advantage will be matched by other regions in the near future. Overall these are all desirable qualities for a visitor destination to have and for the most part all arise inextricably from its very geographical location.

The four key weaknesses identified for Rotorua as they pertain to tourism are both ‘real’ and perceived. Perceived weaknesses have been identified, specifically for the Auckland market – this being a key target, as these can be addressed directly through messaging whilst ‘real’ weaknesses are less easily rectified:

1. Perception of inadequacies vs. other regions for: lower levels of safety, lack of urban landscape, lack of good food and wine, nightlife/entertainment
2. Distance from major international airport
3. Public transport
4. Retail shopping

Some of these are key for attraction of key urban visitors such as Aucklanders whilst others are barriers to visitors enjoying what is currently available. Development of the likes of ‘eat street’ are steps in the right direction to address these as well as the fledging ‘night markets’. Whilst some steps have been made to address some points, not addressing these fully will contribute to failing to increase visitor numbers and spend in the future.

**Aucklanders Expectations of RTO Regions as places to Visit for Holiday & VFR**

(TSG, Regional Visitor Monitor – YE Dec 2010)

**Opportunities and Threats**

The key opportunities identified for Rotorua as they relate to tourism for the next 12-18 months and longer term to the 3 year forecast are:

- Major events and the implementation of an Events Strategy to utilize Rotorua’s strengths in infrastructure and location
- More consistent positioning and messaging to all markets – ‘what is Rotorua’
- Greater development and use of natural resources for ownership i.e.: bush/ mountain biking trails, geothermal (spa) etc
• More spirited and exciting region

To realize some of these in the immediate 12 months may be difficult given the timeframe for planning and implementation i.e.: around events, however some of these do arise from Rotorua’s strengths in terms of natural resources and therefore are harder, if not impossible, to replicate elsewhere. Fundamental to success is the opportunity to build upon Rotorua’s strength in ‘care and friendliness’ to excite Rotorua residents to be Rotorua’s greatest ambassadors and reinforce the proposition that Rotorua is a great place to live and work – and by virtue invest in.

The key threats identified for Rotorua are:
• Competition from other cities, domestic and international
• Air access issues – pertaining to air flight access, capacity and jet service links
• Environmental sustainability
• Hygiene factors around CBD and Rotorua perception

The key threat of competition from other domestic and international cities is a very real threat to Rotorua as an iconic New Zealand destination. This comes about as other cities invest heavily in major events and facilities and destination marketing. Key threats such as air access are ongoing and are becoming more acute due to travelers re-routing to exclude Christchurch. Other threats are manageable and are able to be addressed over time with inclusive planning and development management.
2. **Business Goals and Strategies**

Destination Rotorua Marketing's seven key goals for the forthcoming 12 to 18 months are:

1. Aggressively target and grow the Asian visitor market — specifically China;
2. Grow and increase Rotorua’s share of the Australian visitor arrivals to New Zealand — especially off peak;
3. Increase the average room nights and spend to at least equal the national average for both international and domestic visitors to Rotorua;
4. Increase the Auckland visitor market by 5% - 50,000 visitor nights;
5. Take a leadership position in online marketing and travel search;
6. Create value and work in partnership with Rotorua region operators;
7. Increase ease of access to Rotorua as a visitor destination.

The strategies to achieve the above are as follows:

1. Aggressively target and grow the Asian visitor market — specifically China;
   - Grow and lead RTO communications in market to China
   - Develop strong in-market representation
   - Focus on both group traffic and selected high net worth markets in cities outside of Shanghai
   - Maintain and foster ties with other key South East Asian origin markets such as Japan, Thailand, South Korea, Taiwan and Malaysia

2. Grow and increase Rotorua’s share of the Australian visitor arrivals to New Zealand – especially off peak;
   - Take an RTO leadership position to deliver return on investment and effective marketing communications via online media
   - Leverage other RTO and joint venture activities including Central park to increase attractiveness of the area with Rotorua as the hub

3. Increase the average room nights and spend to at least equal the national average for both international and domestic visitors to Rotorua;
   - Target day and 1 day visitor opportunities including cruise market
   - Work with operators, industry partners and the District Council to convert day visitors into overnight visitors
   - Work with operators to extend length of stay by creating compelling 3-4 night packages and create compelling 3-4 night packages
   - Increase repeat visitation through an events marketing strategy
   - Increase share of conventions and incentives market by encouraging or creating events
   - Optimize key product areas of interest such as cycling, health and adventure
   - Work with industry partners to identify opportunities for increased capacity, spend and yield

4. Increase the Auckland visitor market by 5% - 50,000 visitor nights;
• Change current perceptions of Rotorua to make it top of mind for a short break
• Own the external regional tourism position in the minds of Aucklanders through targeted presence and database activities
• Develop and create a calendar of reasons why Aucklanders would visit the region including events and festivals
• Leverage off conference and incentive activity for delegates to repeat visit with their family/friends

5. Take a leadership position in online marketing and travel search;
   • Develop a content management system, open source platform website that is easily managed updated and future proofed
   • Develop and implement a consumer database communications programme
   • Implement an effective online media programme

6. Create value and work in partnership with Rotorua region operators;
   • Develop a programme of communications that encourages engagement and provides timely and inclusive information
   • Support and provide leadership for product development and issues management as the trusted Rotorua industry partner and as the leader of Rotorua’s destination tourism marketing.

7. Increase ease of access to Rotorua as a visitor destination
   • Lobby action and foster relationships with airlines and airports – domestic and international
   • To help Rotorua International Airport gain additional local and international services
   • Work with other RTOs, the RIAC, TNZ and other stakeholders
   • Work with RDC and other stakeholders on key tourism infrastructure improvement projects

The strategies outlined above will be implemented with combined channel and communication plans. The channel plans are focused around specific top line and functional sales targets. These support and will help deliver the goals through a number of measurable tactics into the following target markets;

Domestic:
• Primary: Auckland, Waikato and the Bay of Plenty
• Secondary: Wellington, National

International:
• Primary: Australia, China
• Secondary: Taiwan, South Korea, Japan, Thailand, UK/ Europe/ USA and developing inbound markets of India, Malaysia etc.

Conventions and Incentives (C & I):
• Primary: Domestic
• Secondary: Australia, the USA and Europe. C & I will be driven through associations and building relationships with key MICE organizations worldwide.

The core channel activities and the tactics that will be implemented for the coming 12-18 months are detailed by channel with reference to the corresponding goal and strategy that they support.
Summary research monitors and reports

New Zealand Commercial Accommodation Monitor (Statistics New Zealand)
What: A monthly census of visitor activity occurring in all commercial accommodation throughout New Zealand. The response rate is approximately 80% with the remaining 20% being imputed based on average demand and known capacity. The data is provided in MS Excel pivot tables segmented by region (regional tourism organisation and territorial authority), visitor origin (domestic and international) and sector (hotel, motel, backpackers and holiday parks). Variables include arrivals, nights, length of stay, capacity and occupancy.


Why: The New Zealand Commercial Accommodation Monitor supports the goals of ‘increasing the average room nights’ and ‘creating value and work in partnership with Rotorua operators’. Specifically, the monitor is a robust measure of average (commercial) room nights and encourages a competitive spirit among Rotorua tourism operators by providing sector specific benchmarking information.

Rotorua Private Homes Monitor (APR Consultants)
What: A monthly sample survey of visitor activity occurring in approximately 300 randomly selected Rotorua households, which is extrapolated to the Rotorua household population. The report segments data by visitor origin (domestic regions and international countries) and purpose of visit. Variables include arrivals, nights and length of stay.

Who: Monthly Rotorua specific report freely available from rotoruaNZ.com website. Semi-comprehensive analysis documented in the monthly Rotorua Tourism In Focus report (circulation 130+ recipients) and quarterly DRTM report to Council. Key statistics briefly overviewed in the monthly DRTM Rotorua tourism stakeholder newsletter (circulation 700+ recipients).

Why: The Rotorua Private Homes Monitor supports the goals of ‘increasing the average room nights’ and ‘supports and provides leadership for product development’. Specifically, the monitor supplements the Commercial Accommodation Monitor to result in a more comprehensive understanding of the total overnight visitor activity. It is indicative of possible substitution of commercial accommodation for private accommodation and is a tool for attractions, activities, dining and retail operators to monitor opportunities for targeting visiting friends and family.

Rotorua Attractions & Activities Monitor (APR Consultants)
What: A monthly sample survey of visits to 12 Rotorua attraction sites and 15 Rotorua activities operators. The report segments data by visitor origin (domestic regions and
international countries) and compares proportions of attraction/activities visits with visitor nights occurring in the Rotorua Commercial Accommodation Monitor.

Who: Monthly Rotorua specific report available only to the 27 tourism operators participating in the monitor. Rotorua specific analysis and interpretive narration distributed monthly to internal stakeholders (13 recipients). Semi-comprehensive analysis and benchmarking tools documented in the monthly Rotorua Tourism In Focus report (circulation 130+ recipients) and quarterly DRTM report to Council. Key statistics briefly overviewed in the monthly DRTM Rotorua tourism stakeholder newsletter (circulation 700+ recipients).

Why: The Rotorua Attraction & Activities Monitor supports the goals of ‘aggressively targeting the Asian market’, ‘growing the Australian market’, ‘increasing the Auckland market’ and ‘creating value and work in partnership with Rotorua operators’. Specifically, the monitor is a robust measure of visitor activity growth by market, an indicative measure of Rotorua’s market share of international visitors and is a valued benchmarking tool by the participant operators.

New Zealand Regional Visitor Monitor (Angus & Associates)
What: A quarterly sample survey of 300 overnight visitors quarterly in each of six New Zealand regions, which is extrapolated based on the International Visitor Survey and Domestic Travel Survey to represent total overnight visitor activity by region. Key variables are demographics, psychographics, behaviour, expectations and satisfaction, which are segmented by visitor origin (domestic, Australian and other International) and documented in the regional and national reports. The entire extensive list of variables is available for segmentation and cross-tabulation to Regional Tourism Organisations using the Tourism Strategy Group’s Harmoni database.

Who: Quarterly Rotorua specific report freely available from rotoruaNZ.com website. Rotorua specific analysis and interpretive narration distributed quarterly to internal stakeholders (13 recipients). Key Rotorua specific statistics and examples of application briefly overviewed in the monthly DRTM Rotorua tourism stakeholder newsletter (circulation 700+ recipients) and quarterly DRTM report to Council. Annual site specific analysis provided to Skyline Skyrides and Rotorua Airport in lieu of using site for surveying. Ad hoc analyses provided as required to DRTM colleagues, Rotorua tourism operators and RDC colleagues (eg. visitor profiles for target marketing, communication/booking channel behaviours, infrastructure management etc).

Why: The New Zealand Regional Visitor Monitor supports the goals of ‘creating value and work in partnership with Rotorua operators’, ‘optimising key product areas of interest’ and ‘working with industry partners to identify opportunities for increased spend and yield’. Specifically, the monitor is a valuable tool for target marketing by visitor profile and identifying market position relative to competing destinations.

New Zealand Convention Activity Survey (Covec)
What: A quarterly sample survey of key convention venues in 12 New Zealand regions, which is imputed for the non-participating venues (based on average demand and known capacity) to represent total convention activity in each of the 12 regions. The data is provided in MS Excel spreadsheets segmented by region, type of convention and delegate origin. Variables include number of conventions, number of delegates and delegate days.

Why: The New Zealand Convention Activity Survey supports the goals of ‘creating value and work in partnership with Rotorua operators’ and ‘working with industry partners to identify opportunities for increased spend and yield’. Specifically, the monitor is a robust measure of Rotorua’s convention activity and market share. It is also useful for tracking change in convention size and duration over time, which convention operators can use to modify their product offering accordingly.

**New Zealand International Visitor Arrivals** *(Statistics New Zealand)*

**What:** A monthly census of international visitor arrivals to New Zealand compiled from the passenger arrival cards collected at international port of entry. The variables include visitor origin, age, gender, purpose of visit, port of arrival and length of stay. Many of the cross-tabulations are freely available from Statistics New Zealand using the online InfoShare tool. More detailed cross-tabulations are available to Regional Tourism Organisations using the Tourism Strategy Group’s Harmoni database.

**Who:** Rotorua specific analysis and interpretive narration distributed monthly to internal stakeholders and Rotorua Airport (15 recipients). Semi-comprehensive analysis documented in the monthly Rotorua Tourism In Focus report (circulation 130+ recipients). Key statistics briefly overviewed in the monthly DRTM Rotorua tourism stakeholder newsletter (circulation 700+ recipients).

**Why:** The New Zealand International Visitor Arrivals analysis supports the goals of ‘lobbying action and fostering relationships with airlines’, ‘growing the Australian market’, and ‘aggressively targeting the Asian visitor market’. Specifically, the analysis segmented by port of arrival adds to the portfolio of tools available to Rotorua Airport to justify ongoing trans-Tasman services and possibly attract new services. The analysis segmented by visitor origin included in the Rotorua Tourism In Focus report can be used by Rotorua operators to measure their market share of Australian and Asian visitor arrivals to New Zealand.

**New Zealand Regional Tourism Forecasts** *(Tourism Strategy Group)*

**What:** An annual forecast of visitor activity in New Zealand regions modelled from the International Visitor Survey and Domestic Travel Survey. The data is provided in MS Excel pivot tables segmented by region (regional tourism organisation), visitor origin (domestic region and international country) and type of visitor (day and overnight). Variables include arrivals, nights, length of stay and expenditure and are documented over six historical and seven future years.

**Who:** Annual Rotorua specific forecast report and regional tourism forecast spreadsheet freely available from tourismresearch.govt.nz website. Rotorua specific analysis and interpretive narration distributed annually to internal stakeholders (13 recipients). Key statistics briefly overviewed in the monthly DRTM Rotorua tourism stakeholder newsletter (circulation 700+ recipients) and quarterly DRTM report to Council.
Why: The New Zealand Regional Tourism Forecast supports the goal of ‘developing a programme of communications that encourages engagement and provides timely and inclusive information’ and ‘support and provide leadership for product development and issues management’. Specifically, dissemination of the forecast positions DRTM as a comprehensive and knowledgeable source of Rotorua specific visitor statistics. It is also a useful tool for destination management and infrastructure planning.

**Domestic Travel Survey & International Visitor Survey** *(Tourism Strategy Group)*

What: Quarterly sample surveys of domestic and international visitors that are then extrapolated to the visitor population. Key variables are demographics, behaviour, expenditure and satisfaction, which are segmented by visitor origin (domestic region and international country) and type of visitor (day and overnight). The entire extensive list of variables is available for segmentation and cross-tabulation to Regional Tourism Organisations using the Tourism Strategy Group’s Harmoni database.

Who: Quarterly national and regionally specific results freely available on tourismresearch.govt.nz website. These two surveys form an important part of the New Zealand core tourism dataset as they are the basis upon which the Regional Visitor Monitor and Tourism Forecasts are modeled, however both surveys come with caveats on regional use given the regional data can vary considerably from quarter to quarter.

Why: The caveats the Tourism Strategy Group places on these two surveys for regional use provides little direct value to achieving the regional tourism goals. However these two surveys do provide indicative insight into some aspects of regional tourism that are not captured in other more robust surveys.

**Hotel Surveys** *(Smith Travel Research-STR; New Zealand Hotel Council-NZHC)*

What: Monthly sample surveys of hotels subscribing to membership in the given organization. The reports segment data based on hotel star ratings. Variables include room rate, revenue per available room, occupancy and proportions of rooms sold by type of guest and guest origin. Additionally STR Global also reports the number of rooms sold.

Who: Hotels receive market share reports as a membership benefit. Regional tourism organizations receive regional reports from STR Global free of charge and from NZHC for a fee. Regional tourism organizations can also request STR Global and NZHC run customized outputs as required for a fee. Hotel statistics from STR Global and NZHC are not available for regional tourism organizations to share with third parties.

Why: The limitations placed on regional tourism organizations in sharing and discussing hotel survey statistics with third parties provides little direct value to achieving the regional tourism goals. However indirectly the hotel surveys are a useful indicative measure of hotel sector profitability, which provides insight into the level of engagement in destination marketing the hotel sector might be expected to partake in.
Brand Rotorua

Background

The Rotorua region has always been a pivotal destination in ‘brand’ New Zealand for international visitors and New Zealanders alike. The classic and arguably stereotypical representation marketing of Rotorua as a destination has always been focused on Maori culture and geothermal attractions in imagery only. This has changed little over the years while over the last 20 years a number of regions in New Zealand have successful taken ownership, or at least positioned themselves as the leaders or centres for specific product and destinational benefits i.e.: Queenstown for ‘adventure, Wellington for ‘Arts and culture’, Auckland and the Bay of Islands for water based recreation. The international visitor market has also changed significantly and there is a strong need to own a marketing proposition around a destination substantiated with relevant, differentiated product.

Tourism product and attractions in Rotorua have developed rapidly over the last 10 years with significant investment having gone into optimizing the regions natural resources i.e.: forestry and river resources, geothermal and iwi owned or managed resources. Whilst different in themselves to similar offerings around New Zealand, Rotorua must decisively stand for something more and work to consistently own a platform to gain scale from a limited marketing budget and provide an accessible story for inbound operators and wholesalers to package and sell, and for domestic operators to leverage.

Whilst there is much debate around ‘what is Rotorua as a destination’ from a differentiated ownership perspective a destinational marketing position must have the following:

- Consistency over the medium to long term to gain momentum and optimize communication efforts externally and within the industry
- Strong substantiation and reasons to believe in both product and services
- It must offer multiple levels of access to cater for the various target geographical, ethnic, maturity and form of markets – including the base of FIT, Group, MICE etc
- Simplicity of message to ensure correct and appropriate translation and interpretation
- Promotion of stand out features and benefits

Much work has been done to establish a positioning, much of it at a level of short-term campaign communication. An agreed positioning is now required to bring together all aspects of the communication plan for Tourism Rotorua for the short to medium term and provide foundation for evolution over time. It is also critical as a common ground from which to identify opportunities for the development of product, allocation of resources and create common goals and themes for the region.

Core brand proposition background:

From a benchmark perspective most destinations differentiate themselves within their own competitive sets and sell themselves on tourism category benefits i.e.: tropical, sandy beaches, fun and excitement based on activities- sprinkled with local culture. There may be little difference in brand definitions. It is well recognized that points of difference alone are not enough to create a distinctive brand proposition against competitors, and in Rotorua’s case – that is every other destination in NZ.
The most effective tool in tourism marketing is brand positioning – the objective being to create a distinctive place in the minds of potential customers. This position ideally needs to be compelling, attractive and preferably something that only the destination can truly “own”. Positioning is a communications strategy that flows on from market segmentation and target marketing. There are 5 critical factors to a successful destinational position:

1. Year around consistency of supply and demand – a ‘365’ day a year view
2. Understanding target market motivations for travel
3. Covering-off of hygiene factors
4. Ownability
5. Reputational value

For example:

- INDIA, home of Ayurveda and now a world-class medical tourism sector;
- SAN FRANCISCO, the self-declared “Gay Capital of the world”;
- SOUTH OF FRANCE, globally known as a centre of magnificent Food & Wine tourism;
- NEW ZEALAND, a centre of 100% pure ecotourism;
  - WELLINGTON, home of arts and culture
  - QUEENSTOWN, home of adventure tourism
  - HAWKES BAY, home of wine and food in NZ

For a destination, such as Rotorua with a very well known ‘master’ country brand – 100% PURE- NZ for ecotourism / green and green, it is vital that any niche positioning is aligned to this in some way. This is to ensure efficiencies of off shore communications and leveraging the global position of the home country.

See appendix A for Rotorua 365 summary of attractions/ features

2. Add to this the consumer decision-making process when choosing a type of holiday or experiences sought and the need to understand and address motivations by target market become critical. A tourist is a distant visitor and a word that often carries ‘negative’ connotations – whereas a traveler – or perhaps ‘guest’ -, is often invited into the local culture and leaves a part of him/ or herself behind and carries the experience with them. There are different motivations for short vs. long breaks, by life stage and cultural background. The key is to identify the mass-market opportunity and understand the smaller niche volumes. It is impossible for a destination to target everyone at once,
and any positioning takes time – especially to change perceptions and views in the short term.

See appendix B Domestic customer top line summary motivations

3. For the ‘mass market’ be it families, groups, day-trippers or adventurers there are some core hygiene factors that must be clearly articulated. These are:

- Comfortable accommodation with a range of options – from bed and breakfasts, motels, hotels to boutique accommodation and luxury lodges
- Safety – both in terms of personal and possessions – this also relates to friendliness and in non English speaking countries the ease of issue resolution
- Ease of access and mobility
- Food – restaurants/ cafes/ bars and supermarkets – range of and variety
- Attractive centre of city/ town – particularly for international visitors. The centre of a destination is often the first impression of a destination (after the airport or bus/ train terminal)

4. Ownability - a destinational positioning is built at every point of contact with customers - if your identity is going to convince anyone outside of the area, it has be believed by the people living in it. One-off initiatives have very little impact on attitudes so a clear consistent message must be reinforced using different media over time. Places and images evoke different sorts of emotional experiences so it can be challenging to provide an inspirational image that can be interpreted in the same way. Instead, simplifying the message and tailoring to different target markets – with referral back to the core positioning can be a successful and cost effective means to achievement over the short to medium term.

Building a proposition on the unique selling point of a region, that is emotionally appealing, targeted to visitor preferences is the key to success.

5 Reputational value

All destinations need an emotional connection to their prime audience. A feeling that only this place “my place” can provide entertainment, sights, experiences and adventure. My place is not necessarily the best or the cheapest but it’s something for me to boast about, to advocate to others and perhaps surprise them, which has credibility and meets not just the “where should I go” but also the “why should I go” requirements.

Brand Proposition Rotorua

In reviewing the above for Rotorua it becomes very clear that many of its regional features are not completely ‘unique’ in and of themselves. However, ownership is also about ‘being the first’. When these features are viewed in a ‘365’ day calendar for supply and demand it becomes very clear that there are 2 core features that are visitor friendly ‘365’ days a year.

See appendix A & B

When this is then distilled down to a core proposition and separated into the generically top level targets of domestic vs. international visitors and overlaid with substantiations and potential insights for communication it is clear that Rotorua does indeed have a powerful positioning that is not only aligned internationally with the global ‘brand NZ’
positioning it also provides fertile territory for a communications programme – changed out domestically and internationally.

In summary:

- Rotorua’s geographical location is at the ‘centre’ of NZ
- It is unique for being the largest geothermal region in NZ
- It is a recognized centre of excellence, concentration and celebration of indigenous Maori culture/venture and resources

For Kiwi’s you’ve probably experienced Rotorua as a kid and it was ‘fun’. As an adult there’s so much more you can do. Everything ‘grows up as such’. For Kiwi audiences the message is about the things you don’t know/ haven’t seen/done and focusing on the surprises as part of the reasons to visit ie: geothermal almost means spas, new attractions, forests also give you mountain biking, rivers have trout but also rafting/kayaking, maori cultural ventures provide access for art/culture and investment etc.
Internationally, Rotorua is all the things you have heard - at a superficial level but at an emotional level it’s the ‘heartland of NZ underpinned in messages by its geothermal resources. When you visit Rotorua you not only visit, you experience Rotorua and New Zealand. If there was ONLY one place you could go in New Zealand to experience what makes NZ different and unique, you’d have to choose Rotorua.

Wrapped around and threaded through everything is the essence of Maori philosophy and beliefs – particularly Manaakitanga and Kaitiakitanga. From mountain to lake, forests above and geothermal below, in Rotorua you can experience all that is good in NZ at its authentic physical, active, cultural ‘heart’.

Hierarchy of brand benefits: All of the tourism features and benefits flow down from the tow core brand ownables of geothermal and cultural centre as follows:
What does this mean?

- All communications for Rotorua will spin off from a core ownership of geothermal and ‘experiential’ message.
- Creative execution must deliver the weighting of emotion and THE STORY not just photos of i.e.: rafting/ gondolas it also cannot focus on one element ie: a photo of a mudpool.
- Product areas for growth and investment will reference back to geothermal and kaitiakitanga and product linking to these.
- Focus will be given to owning and developing product and events that reinforce the message of Rotorua’s leadership product areas.
- Rotorua DC must incorporate this authenticity and commitment into everything from signage/ planning and product. This includes taking the opportunity to ‘tell the story’ wherever possible (Auckland zoo is a great example of this) – attractions/ locations have more than a name sign.
- Rotorua DC must review and address the hygiene factors for destination success i.e.: main street leading to visitor centre, and from the airport is very not ideal to deliver on key perception areas of safety and ‘attractiveness on 1st impression.

Explanation kaitiakitanga and manaakitanga:
“Kaitiakitanga is the role played by kaitiaki. Traditionally, kaitiaki are the many spiritual assistants of the gods, including the spirits of deceased ancestors, who are the spiritual minders of the elements of the natural world. All the elements of the natural world, the sky father and earth mother and their offspring; the seas, sky, forests and birds, food crops, winds, rain and storms, volcanic activity, as well as the people and wars are descended from a common ancestor, the supreme god. “

These elements, which are the world’s natural resources, are often referred to as taonga, that is, items which are greatly treasured and respected.

In Maori cultural terms, all natural and physical elements of the world are related to each other, and each is controlled and directed by the numerous spiritual assistants of the gods.

“These spiritual assistants often manifest themselves in physical forms such as fish, animals, trees or reptiles. Each is imbued with mana, a form of power and authority derived directly from the gods. Man being descended from the gods is likewise imbued with mana, although that mana can be removed if it is violated or abused. There are many forms and aspects of mana, one of which is the power to sustain life.”

Maoridom is very careful to preserve the many forms of mana it holds, and in particular is very careful to ensure that the mana of kaitiaki is preserved. In this respect Maori become one and the same as kaitiaki (who are, after all, their relations), becoming the minders for their relations, that is, the other physical elements of the world. “

As minders, kaitiaki must ensure that the mauri or life force of their taonga is healthy and strong. In order to uphold their mana, the tangata whenua as kaitiaki must do all in their power to restore the mauri of the taonga to its original strength.

Manaakitanga: is the sharing, looking after and respecting each other and is often used in the context of hosts and visitors.
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<tr>
<td>Helicopter/sightseeing</td>
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<tr>
<td>Outdoor activities</td>
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<td>Agrodome</td>
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<tr>
<td>Museums/caterpillar exp</td>
<td>P</td>
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**Seasons**
- High season
- Shoulder/spring
- Low/winter
- Shoulder/autumn

**Symbols**
- P = Peak - Ideal weather or season
- L = Low suitability - weather dependent
- S = Subject to weather
- X = Not suitable
# Domestic Audience Breakdown

<table>
<thead>
<tr>
<th>Target Audience</th>
<th>Why am I going?</th>
<th>what do I want to do/ experience</th>
<th>How does Brand Rotorua deliver?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Families</strong></td>
<td>short break with kids</td>
<td>school holidays</td>
<td>Stuff for the kids to do/see/things we can do as a family</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>attractions - Zorb/luge/rainbow springs/geothermal parks</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>dad wants adventure - hobby/sports</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>mountain biking/forests/gateway to ski/zorb/schweeb/skiing'</td>
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<td></td>
<td></td>
<td></td>
<td>Mum wants to relax a bit/gentle activities</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>geothermal spas/bush walks/</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>affordable comfort for a family</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Comfortable accommodation - B&amp;Bs, motels and hotels</td>
</tr>
<tr>
<td><strong>Couples</strong></td>
<td>short/ weekend getaway</td>
<td>holiday - see the country</td>
<td>do the things we 'should' do</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>geothermal prks and cultural village tours</td>
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<tr>
<td></td>
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<td></td>
<td>sports/hobbies - be great if we can do what we love in cool new places - ie: biking/tramping</td>
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<td></td>
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<td></td>
<td>Mountain biking, bush walks/skiing on the lake/adventure</td>
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<td></td>
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<td></td>
<td>we'd like some 'us time' relax and enjoy together</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>resort/hotels/luxury lodges, spas and geothermal parks - pools</td>
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<td></td>
<td></td>
<td></td>
<td>affordable comfort through to luxury - our choice</td>
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<tr>
<td></td>
<td></td>
<td></td>
<td>B&amp;Bs through to Luxury lodges</td>
</tr>
<tr>
<td><strong>Free spirit kiwi (FIT)</strong></td>
<td>need to see more than where I am' from</td>
<td>do what I want to do</td>
<td>focussed hobbies/sport - biking/skiing/tramping</td>
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<tr>
<td></td>
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<td></td>
<td>Events/ festivals/Mountain biking, bush walks/skiing on the lake/adventure</td>
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<td></td>
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<td>find out more/experience more about NZ</td>
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<td></td>
<td></td>
<td></td>
<td>geothermal prks and cultural village tours/home stays</td>
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<td></td>
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<td>try something new</td>
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<tr>
<td></td>
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<td></td>
<td>adventure activities - zorb/river rafting/m.biking etc</td>
</tr>
<tr>
<td><strong>Groups (small and large)</strong></td>
<td>an occasion/ event/ conference/ biz trip</td>
<td>mini break</td>
<td>relax and indulge</td>
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<tr>
<td></td>
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<td></td>
<td>comfortable motels through to boutique hotels and luxury lodges, geothermal spas</td>
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<td></td>
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<td></td>
<td>indulge my passion - sports/adventure/food/music</td>
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<td></td>
<td>events/festivals/forests m.biking/restaurants and bars</td>
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<td></td>
<td>get the work done in nice surroundings - where we can get out and about</td>
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<td>mid range to high end hotels/venues - attractions and geothermal parks/ maori cultural shows and tours</td>
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<td></td>
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<td></td>
<td>find a place where the 'girls' can get away</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>boutique hotels/motels/good restaurants/cafes and bars/geothermal spas</td>
</tr>
</tbody>
</table>