

A wide-angle photograph of a park in Christchurch, New Zealand. In the background, the Christchurch War Memorial is visible. The foreground shows a paved area with a yellow tactile strip, a concrete bench, and a small stream. A large, semi-transparent red rectangle is overlaid on the center of the image, containing the title and presenter information.

Christchurch Perceptions Winter Pulse

Presented by Clarity Insight & NBuchanan Consulting
October 2019

Key Insights

Key Insights

Regeneration of city central to perceptions

Perceptions of being progressive, exciting or cool are largely underpinned by the re-build activity and well aligned between 'younger' residents and non-residents. Being seen as beautiful has a lot to do with natural landscapes/spaces, but also touches on historic and modern architecture.

Nature Lovers are the ideal target segment

Six in ten of the potential 'younger' visitor market are primarily motivated to travel for two reasons – relax/escape and enjoy nature

Given the nature/outdoors options available in Christchurch the Nature Lovers seem like the ideal target. They also recognise what Christchurch has to offer in this space, indicating the strongest intention to visit. However, half of them are based in Auckland so overcoming the distance factor could be crucial.

Given the ongoing evolution of entertainment options in Christchurch, The R&R Seekers are also a viable target, offering the greatest volume opportunity. However, there is also more competition for 'weekend getaway' type of travel.

Importance of word of mouth recommendation is evident with this being the heaviest influence on choice of travel destination.

Resident recommendation links to target market, but some deeper issues to resolve

In the short-term, 'younger' residents are more willing to recommend based on lifestyle, community/family, outdoors, entertainment – the latter two of which dovetail nicely with the suggested target segments.

Longer term there are some deeper issues to address that are hindering willingness to recommend – primarily a lack of differentiation compared to what visitors could get at home.

Attracting migrants home

Seven in ten of those showing an openness to migrating to Christchurch have some link to the city – the emotional connection to the city is probably already established, so the more functional aspects such as salary, house prices, extra leisure time need to be right to convert that openness into moving.

Getting underneath perceptions of Christchurch Brand

Defining 'Beautiful'

Surrounding scenery

"the unique mountain backdrop is beautiful"

"Christchurch is bordered by beauty"

City gardens and green spaces

"Lovely flowers, trees and plants everywhere"

"Botanic Gardens, River running through the city, lots of trees and parks"

Architecture

"It's bursting with beautiful new buildings and landscapes"

"The red zone brings a wonderful 'nature' to the East suburbs, the mash up between nature and contracted graffiti"

History

"Oldest city in New Zealand"

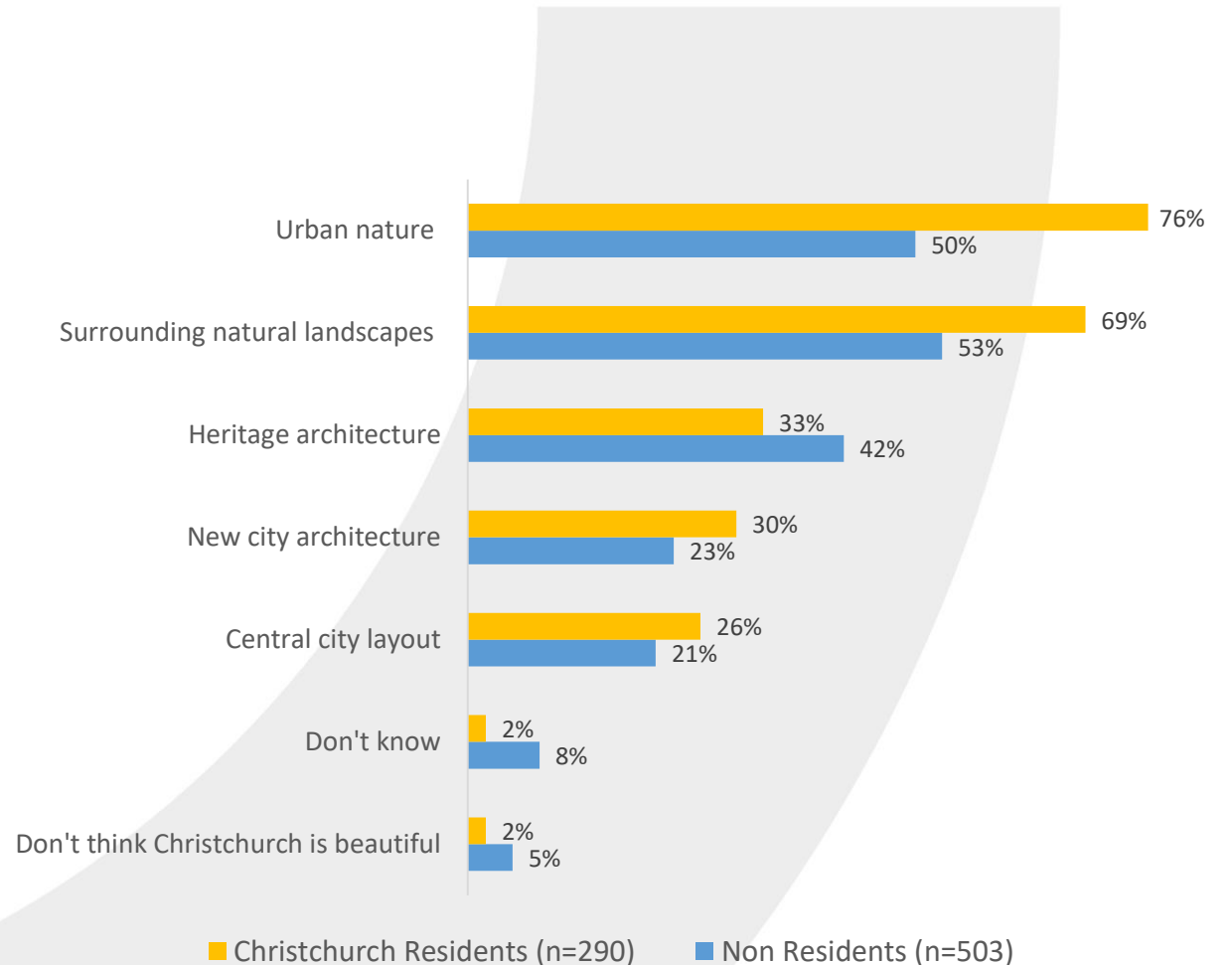
"The cathedral represents old beautiful architecture"

Relaxed/peaceful vibe

"Less people means a peaceful environment"

"A nice place to unwind"

What Makes Christchurch 'Beautiful'?



Defining 'Progressive'

Rebuilding earthquake damaged areas

"The new design of the city post earthquake - eg the container mall"
"The way they rebuilt to the current day needs of people"

Building/expanding with a modern ethos in new areas

"Lots of new buildings since the earthquake. New areas, new things"
"Being progressive by moving forward with its architecture and making way for new ideas and styles"

Resilient mindset and taking action

"Making the most of the hand it has been dealt"
"It has had a lot happen to it and it just bounced back"

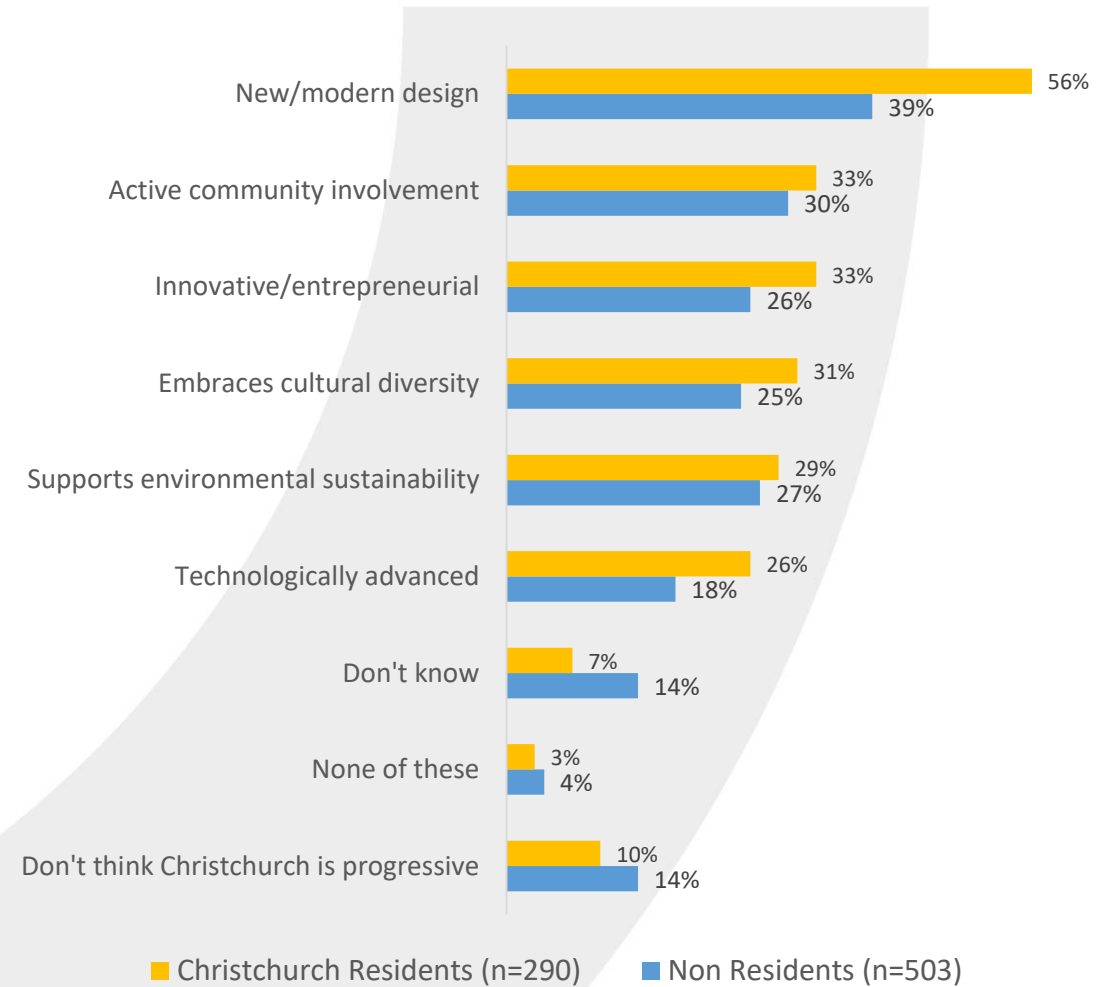
Economic shift

"New Businesses. New buildings"
"New stores, and places to socialise are going up"

Technology and innovation

"Using the most up-to-date techniques in building"
"Leading the way in new architectural development and city planning"

What Makes Christchurch 'Progressive'?



Defining 'Exciting'

New development/growth

"Lots of new building and new businesses popping up"
"New stores are opening up; it's a city that is changing constantly"

Lots of entertainment on offer

"I love the new places to take the kids eg Margaret Mahy playground"
"Lots of pop ups around, especially in town seeing something new and different. You have hammocks in the city, a gaming stick."

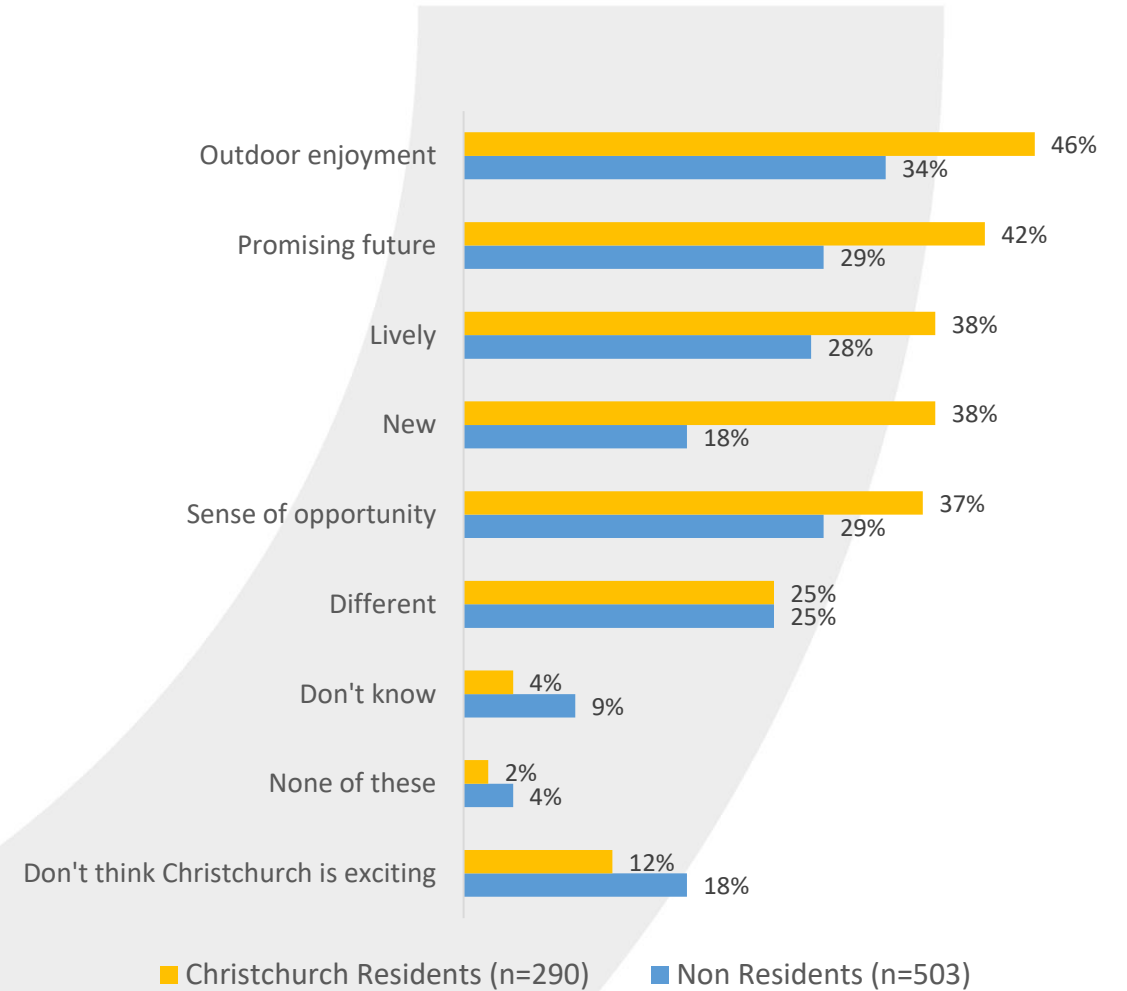
Outdoor attractions and scenery

"Adventure sports are in close proximity"
"The beautiful red zone to walk around with the dogs and children"

Opportunity to reinvent itself

"The new cool things around the city are very innovative, crafty well thought of things"
"Christchurch is going to have a cool mix of old and modern"

What Makes Christchurch 'Exciting'?



Defining 'Cool'

New and up-to-date

"It's a rebuilding city with lots of new, hip areas"

"It is an up-to-date and vibrant city to be in"

"It's almost the new art deco of New Zealand"

City art and design

"Trendy due to hip new eateries that have popped up, and the art installations like the space invaders and dance floor in the CBD"

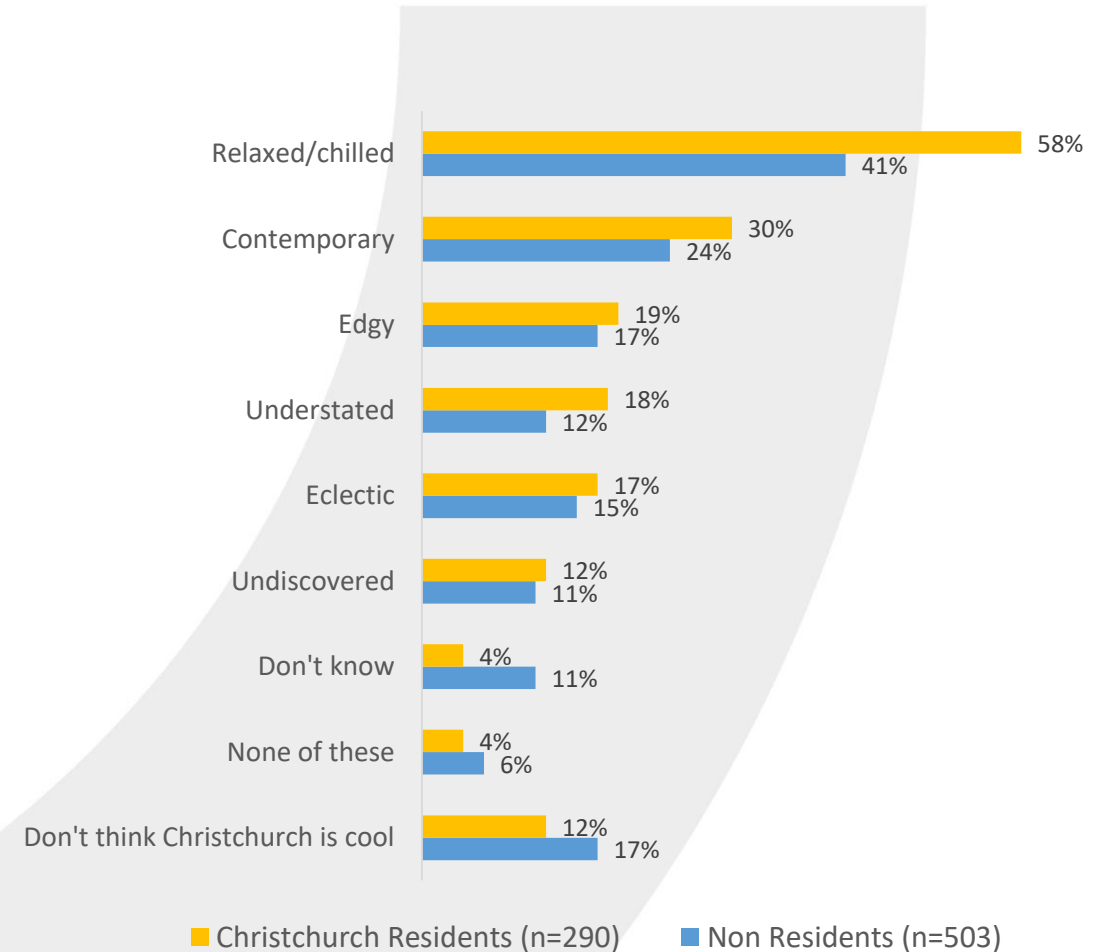
"With all the new buildings popping up, we are getting a lot of new leisure activities and architectural beauties"

Relaxed boho vibe for a big city

"Calm and cool city without the rush of city life"

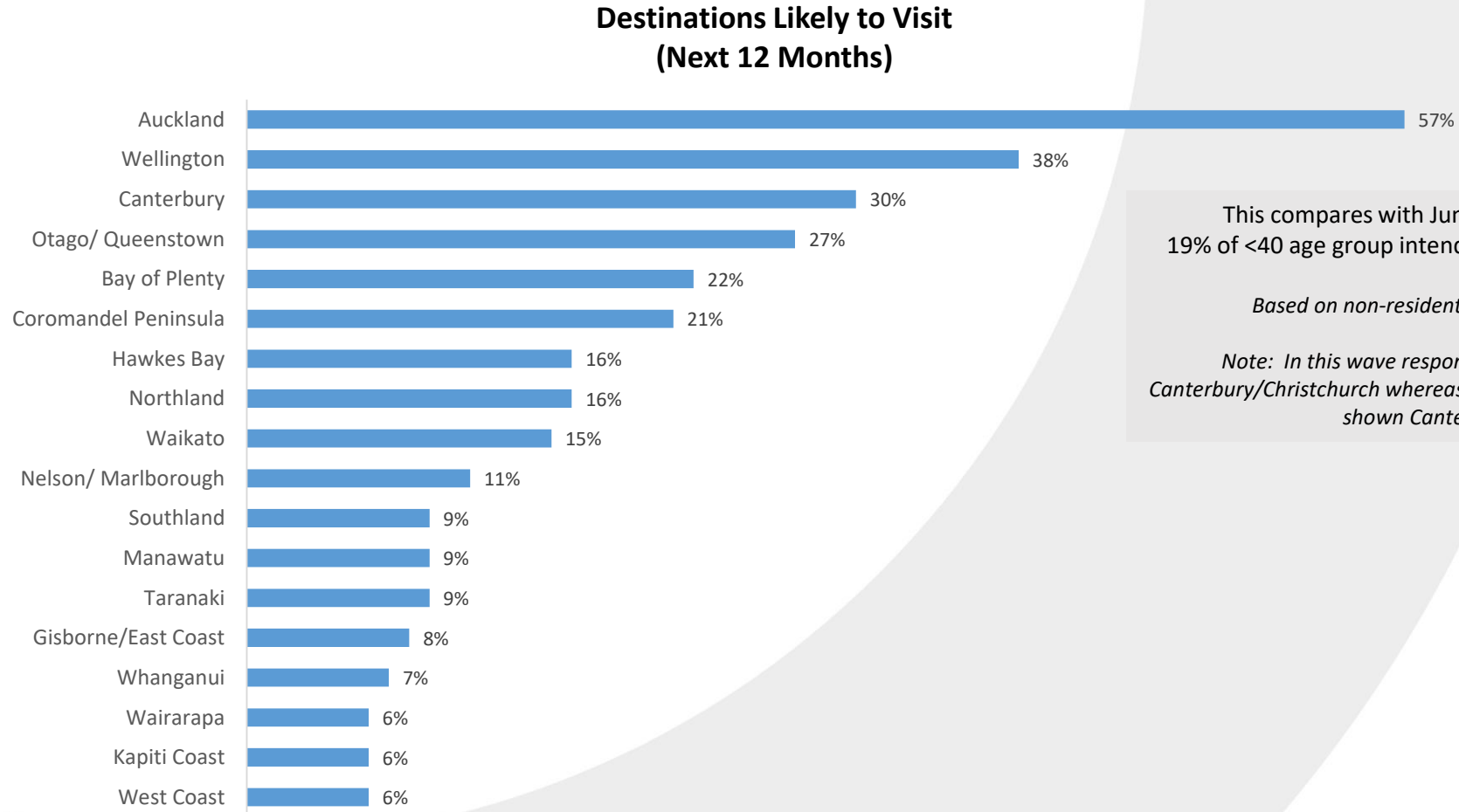
"Artsy, a bit hipster, vibrant"

What Makes Christchurch 'Cool'?



Encouraging Non-Residents to Visit Christchurch

Almost one quarter of target non-residents indicate an intention to visit Christchurch in the next 12 months



This compares with June 19 wave when 19% of <40 age group intended to visit Canterbury

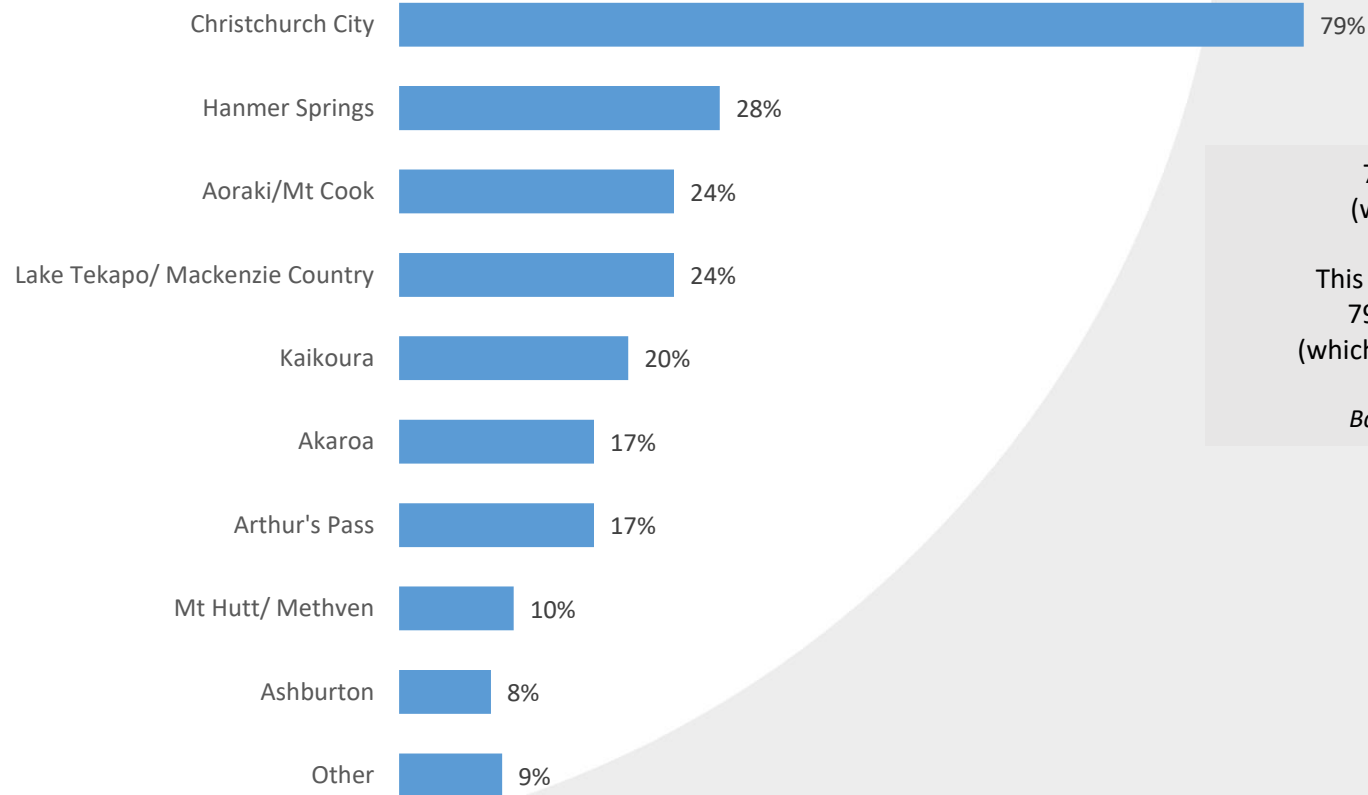
Based on non-residents of Canterbury

Note: In this wave respondents were shown Canterbury/Christchurch whereas previously they were only shown Canterbury

Respondent's home region couldn't be selected, so each region has a unique base excluding its residents from the national total of n=503

Eight in ten intend to visit the city, while Hanmer Springs, Aoraki and Lake Tekapo are also sought by around one quarter of those visiting Canterbury

Intended Destinations to Visit in Canterbury in Next 12 Months



79% intend to visit Christchurch (which is 23.7% of <40 age group)

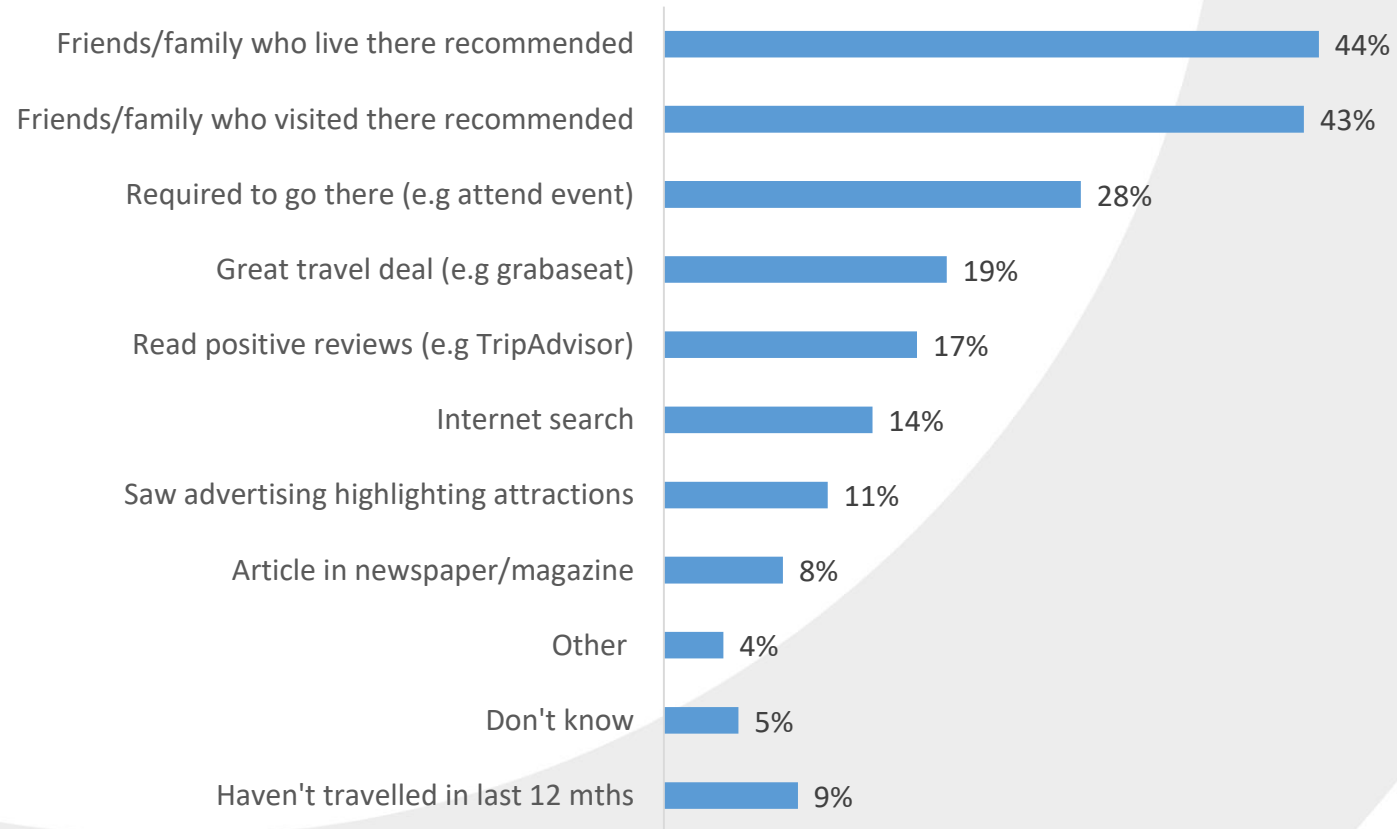
This compares with June 19 wave when 79% intended to visit Christchurch (which represented 15% of <40 age group)

Based on non-residents of Canterbury

Those planning to visit Canterbury in next 12 months n=133

Importance of friends/family recommendation is clear. In terms of promotional effort, travel deals and social media reviews are prominent

**Significant Influences on Choice of Domestic Travel Destination
(Non-Residents of Christchurch)**

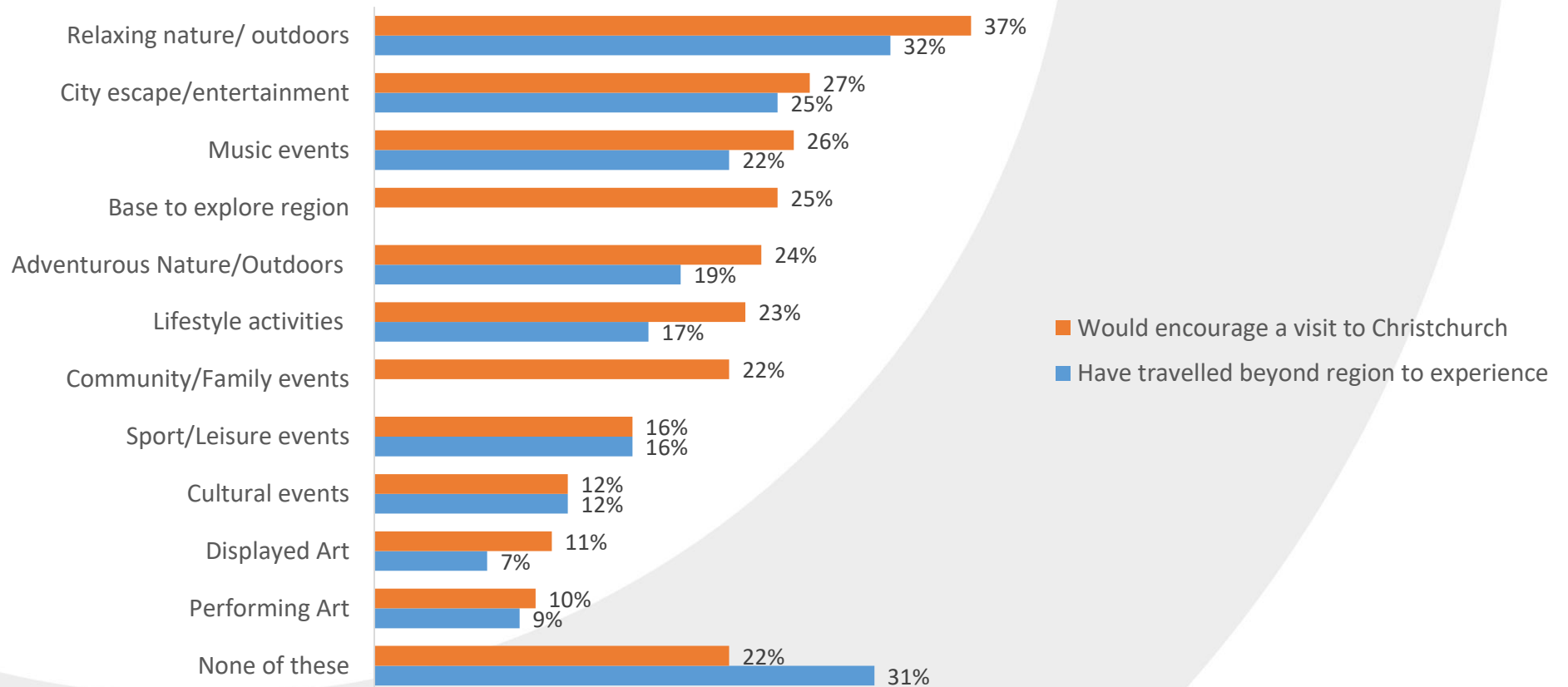


n=503

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Clear alignment between what potential visitors are seeking from Christchurch and what they have travelled for previously

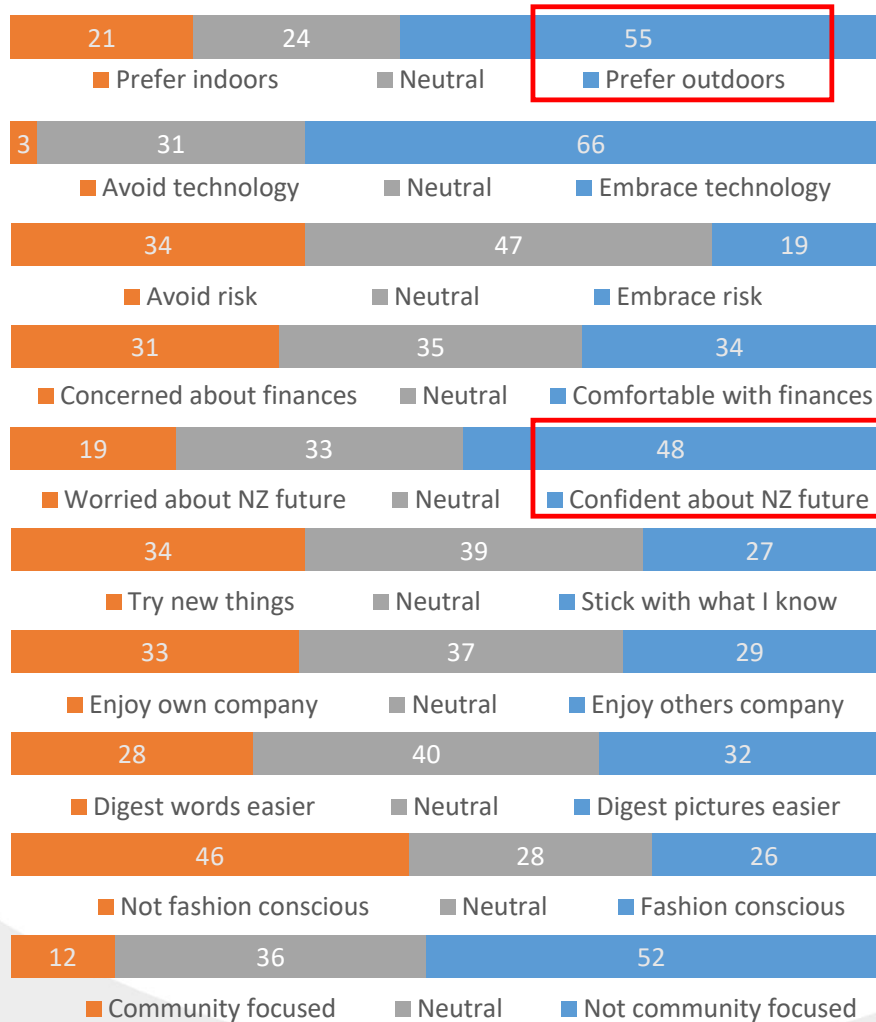
Reasons For Travelling Outside of Home Region – Last 12 Months
(Non-Residents of Christchurch)



n=503

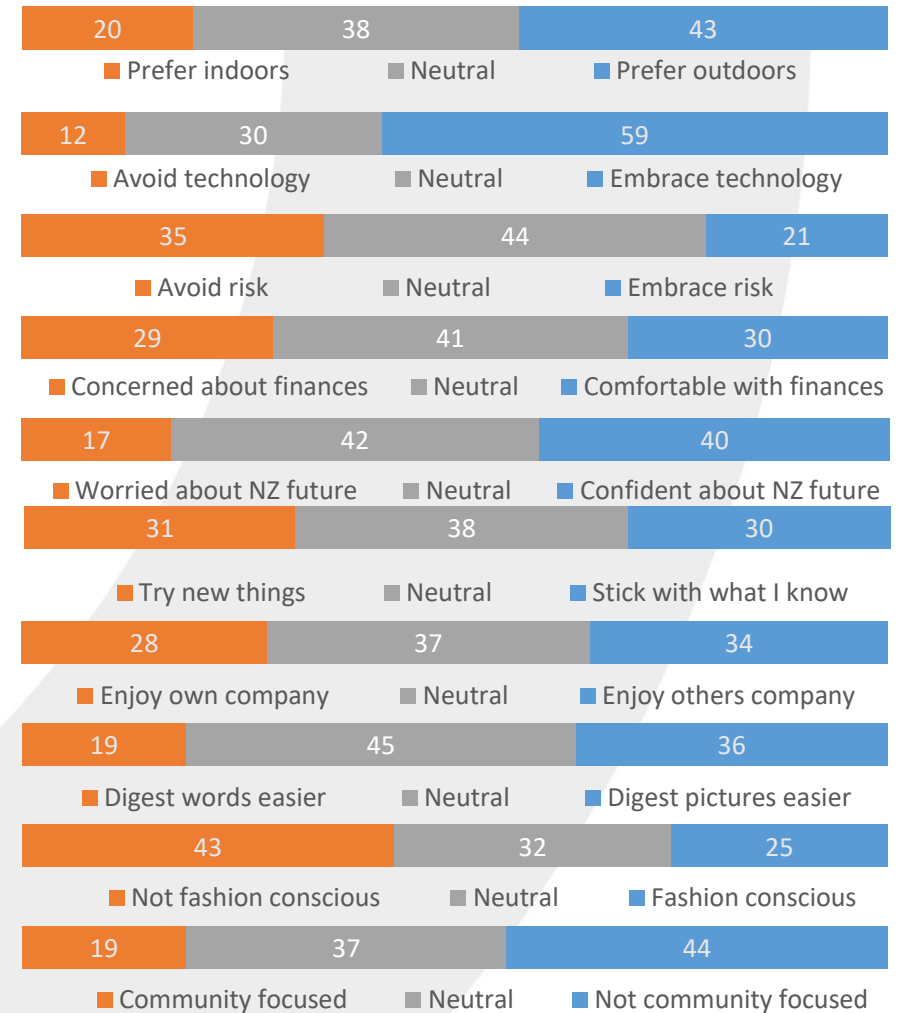
Non-Residents were not asked whether they had travelled for community/family events or to a base to explore from

Lifestyle Attitudes – Interested in Visiting Christchurch



Those planning to visit Christchurch in next 12 months n=106

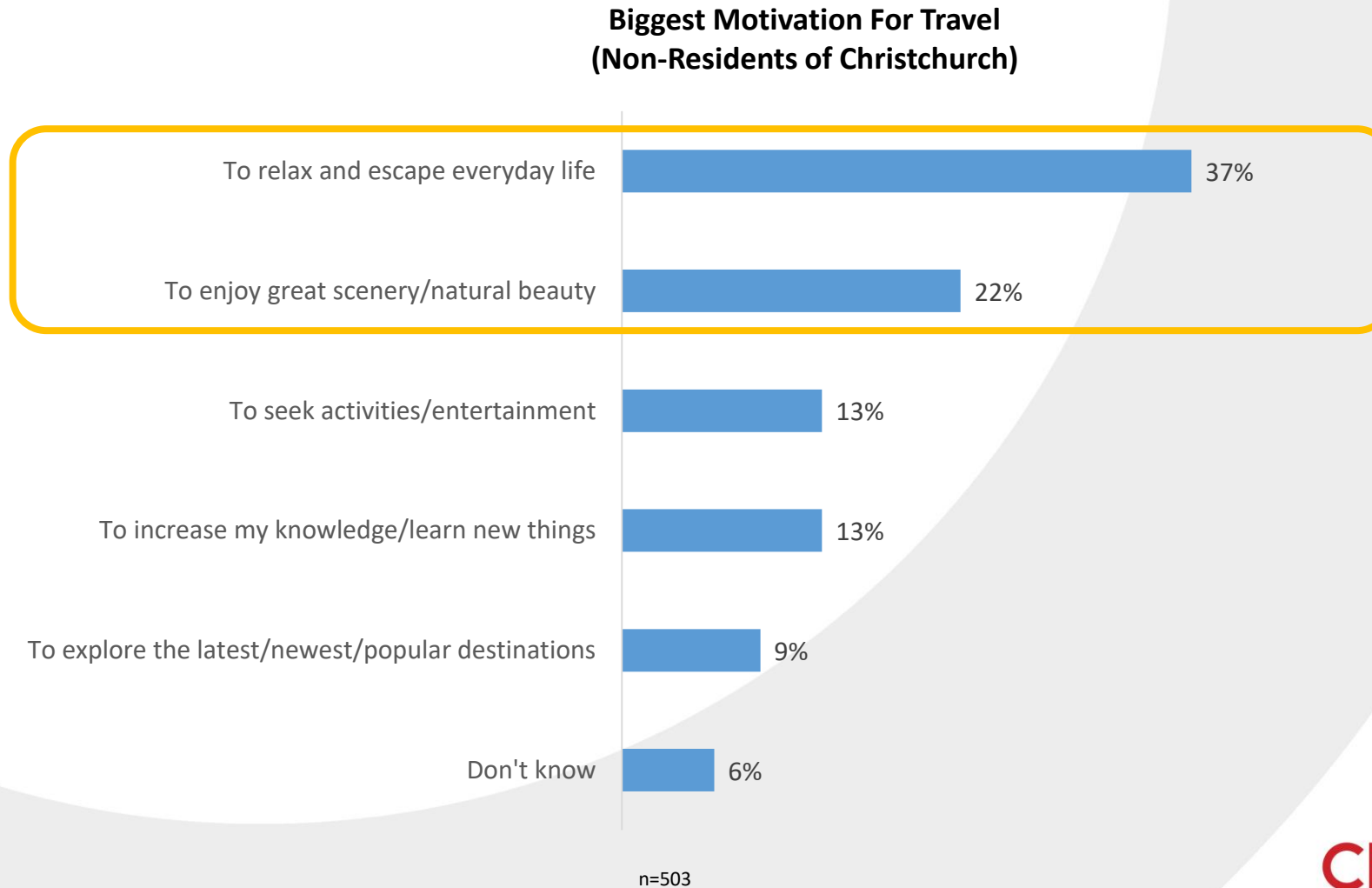
Lifestyle Attitudes – Not Interested in Visiting Christchurch



Those not planning to visit Christchurch (nor Canterbury) in next 12 months n=370

Profiling Non-Residents by Motivations for Travel

Six in ten of the potential market are primarily motivated to travel for two reasons – relax/escape and enjoy nature

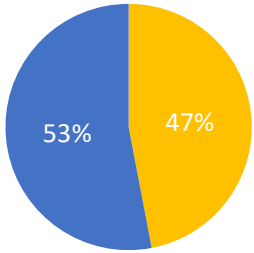


Female skew to target segments with half of Nature Lovers in Auckland

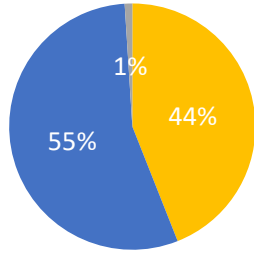


Gender

R&R Seekers



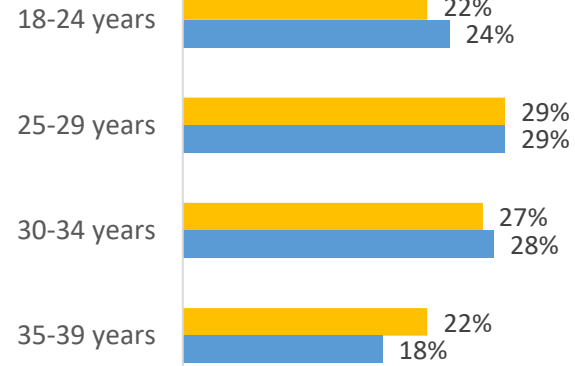
Nature Lovers



Male Female Gender diverse

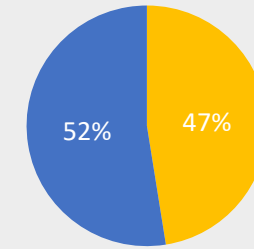


Age

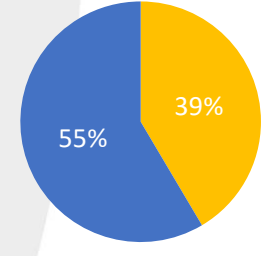


Household Composition

R&R Seekers



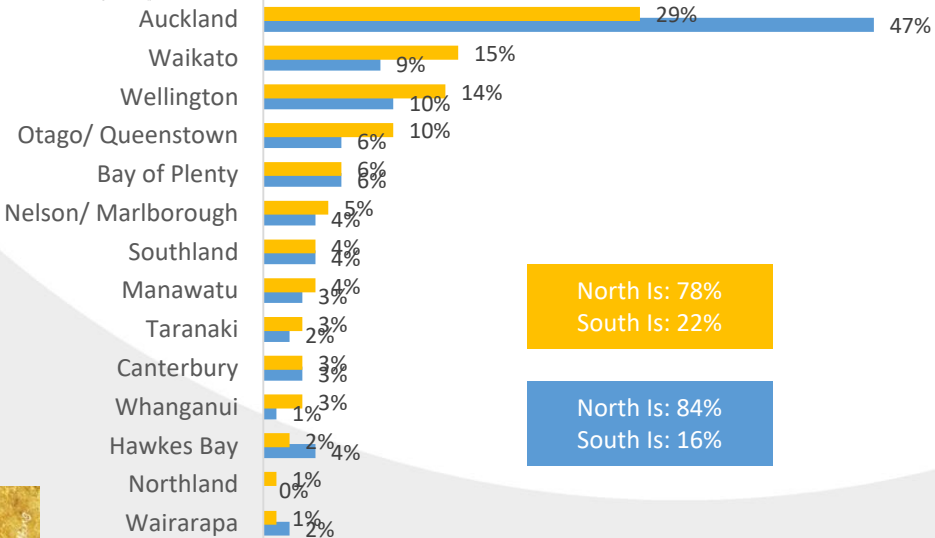
Nature Lovers



Kids in household No kids in household



Location

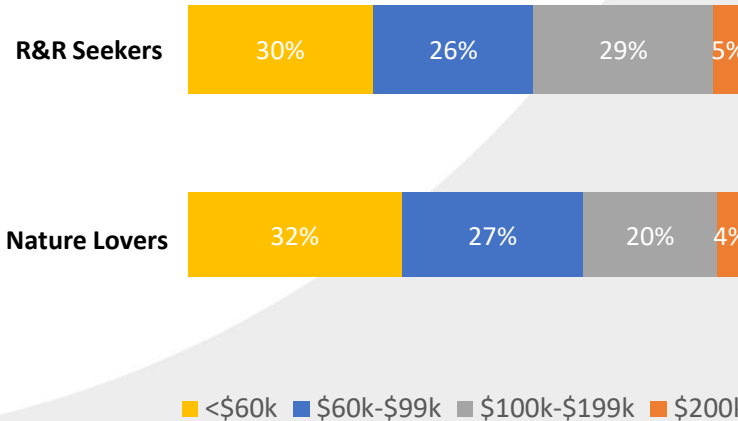


North Is: 78%
South Is: 22%

North Is: 84%
South Is: 16%



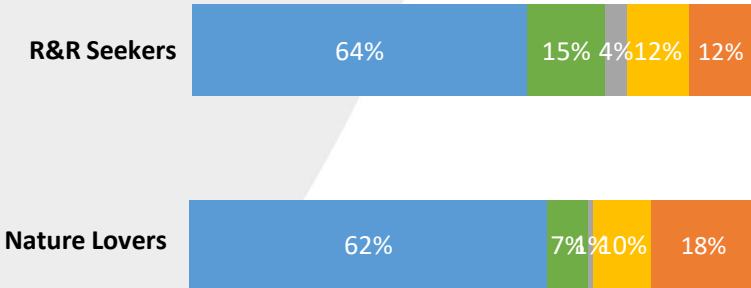
Household Income



<\$60k \$60k-\$99k \$100k-\$199k \$200k+



Ethnicity



NZ Euro Maori Pacific Islander Asian Other

R&R Seekers (n=186)

Nature Lovers (n=115)

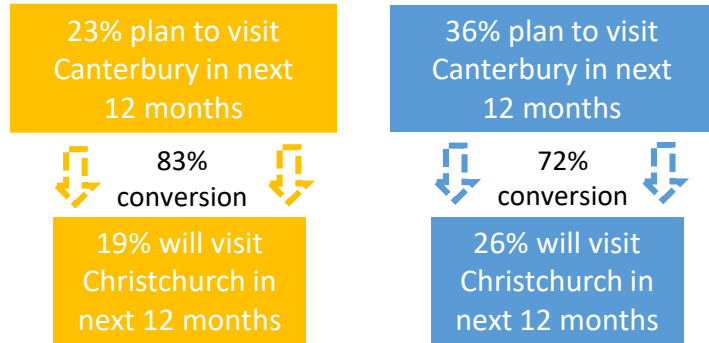
ChristchurchNZ™



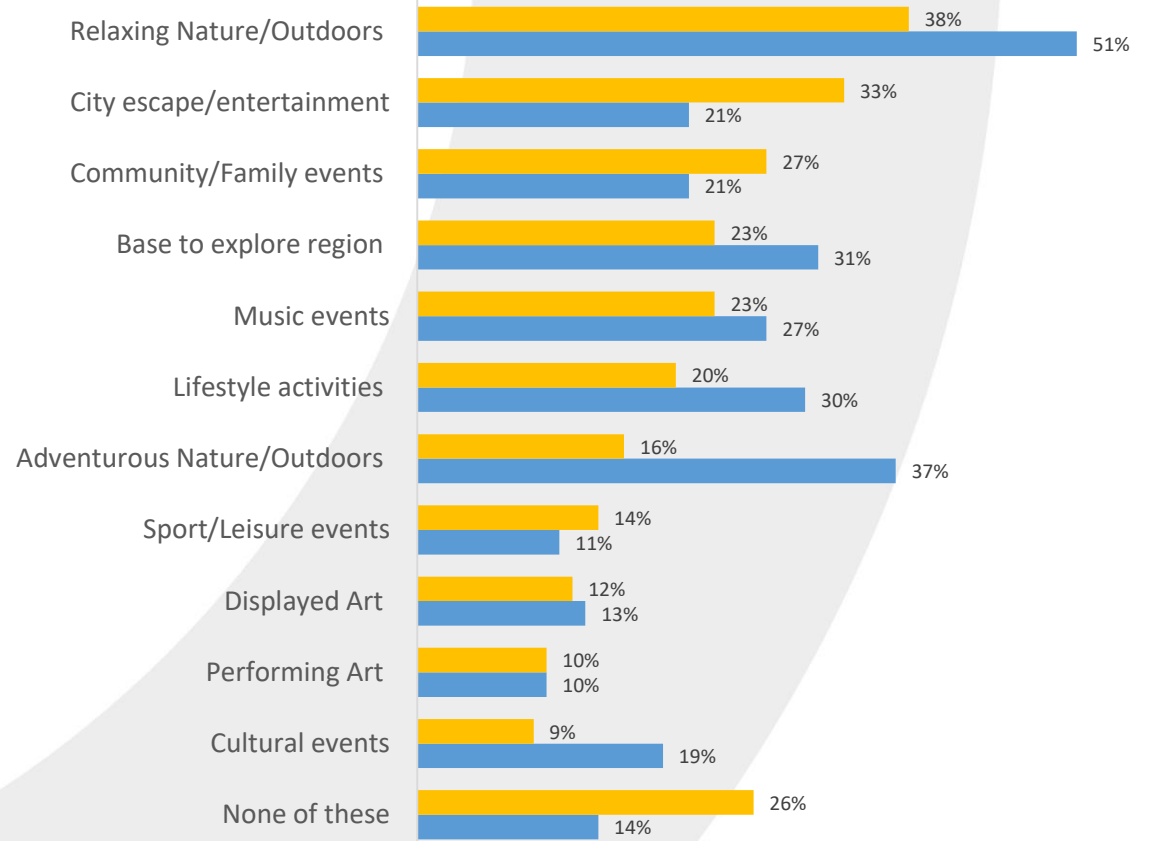
Nature Lovers show a stronger intention to visit Christchurch



Intentions to Visit Christchurch

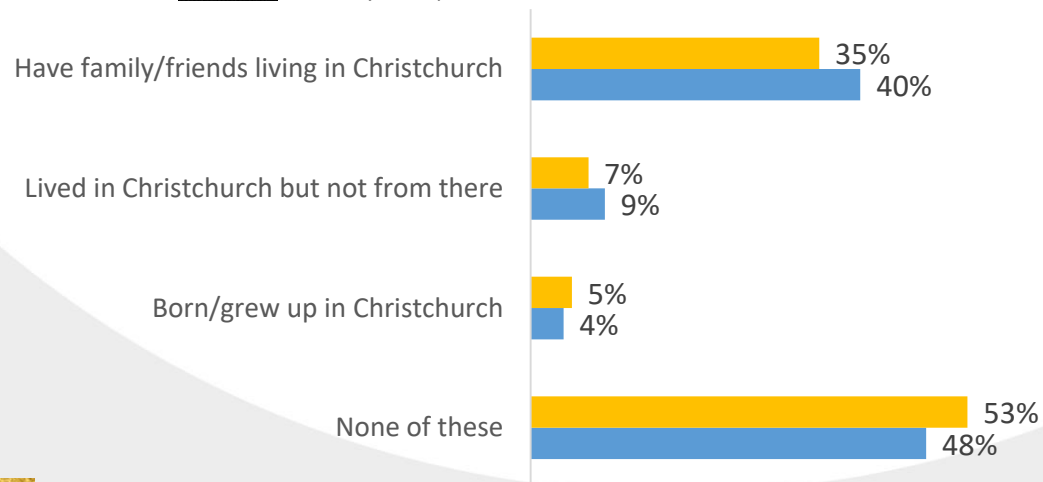


Motivators for Visiting Christchurch in Next 12 Months



Relationship with Christchurch

Only one option could be selected



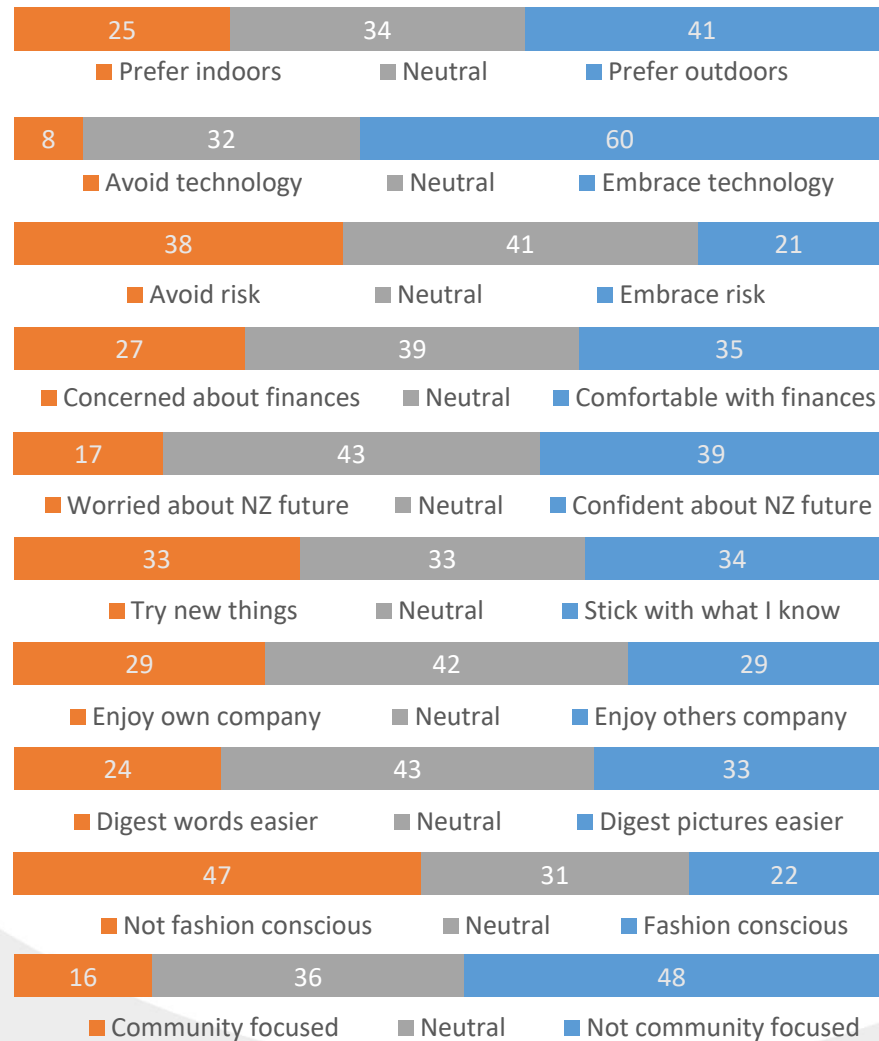
R&R Seekers (n=186)

Nature Lovers (n=115)

ChristchurchNZ™

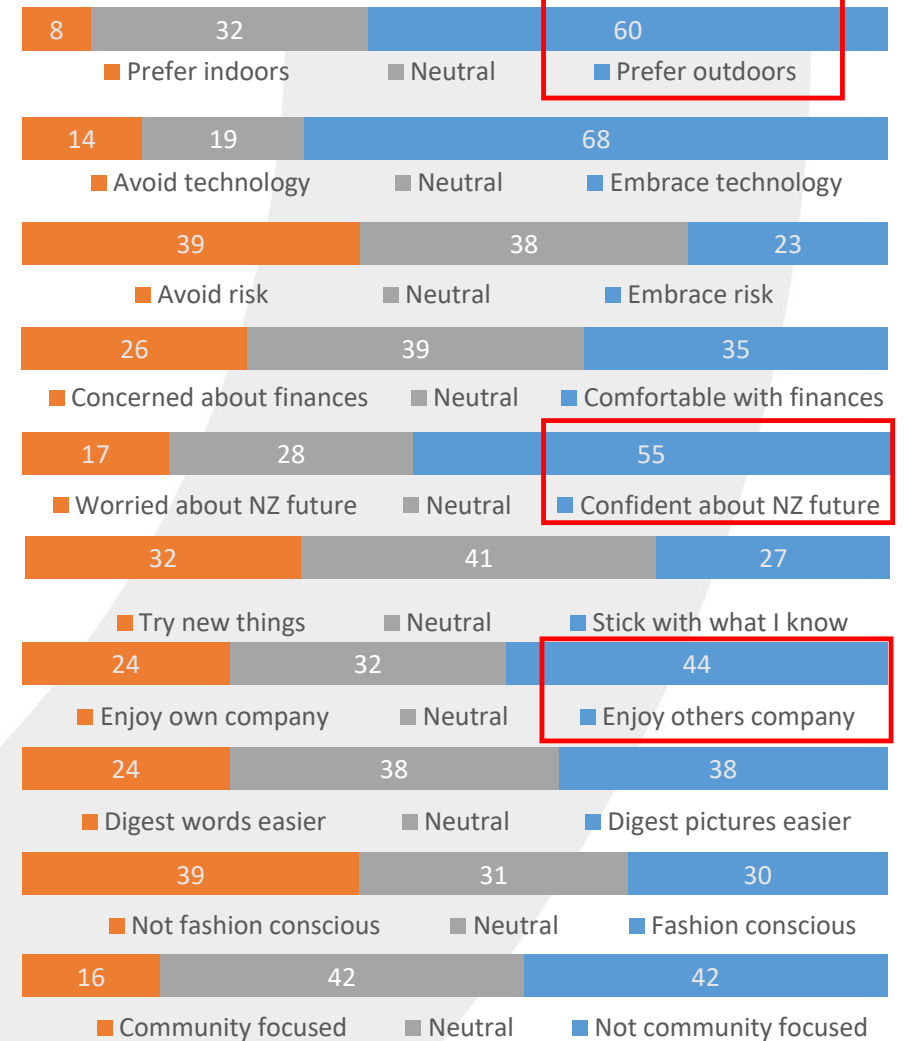


Lifestyle Attitudes – R&R Seekers



Those motivated to travel to escape/relax n=186

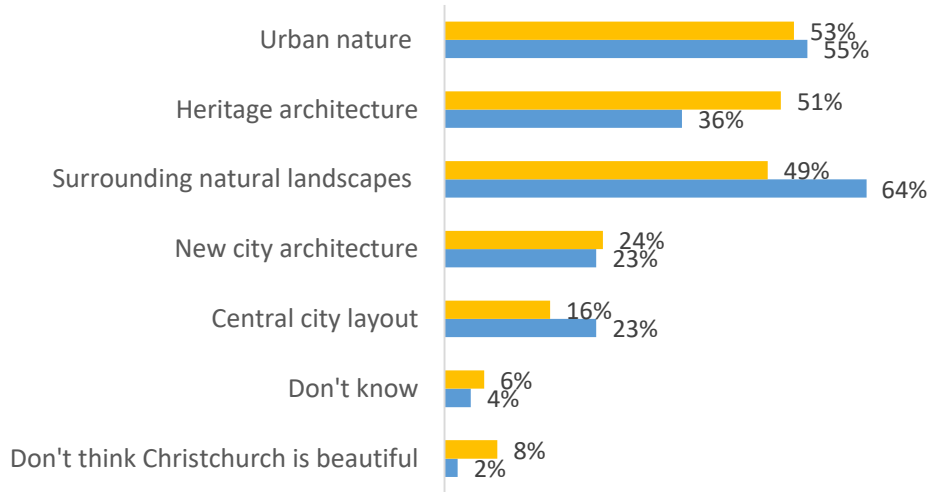
Lifestyle Attitudes - Nature Lovers



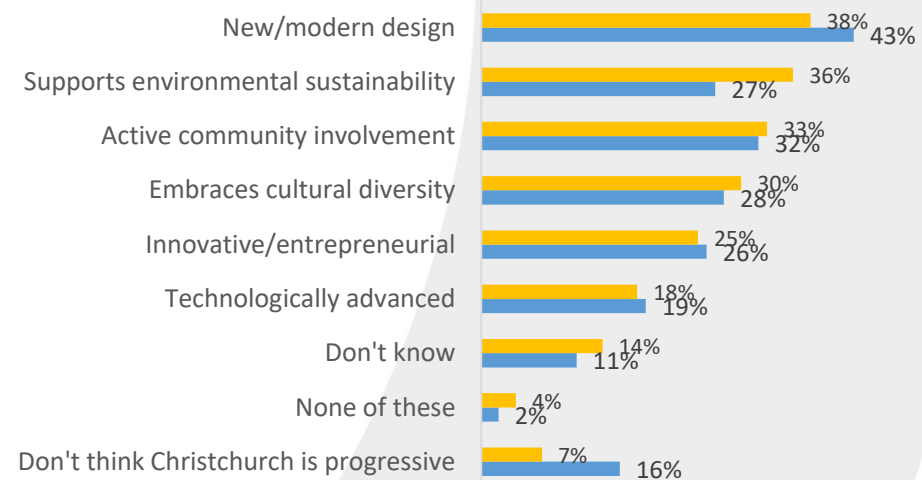
Those motivated to travel to enjoy nature n=115

Similar perceptions amongst target segments although Nature Lovers accentuate the outdoors

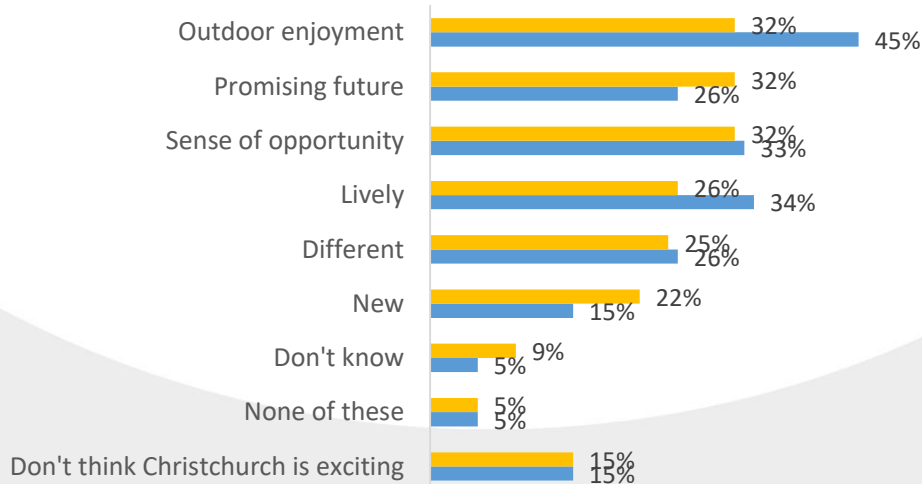
What Makes Christchurch 'Beautiful'



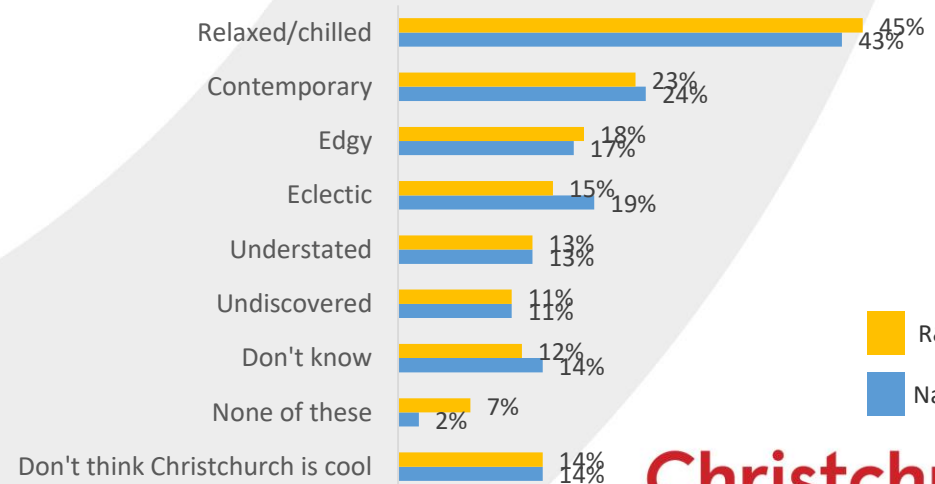
What Makes Christchurch 'Progressive'



What Makes Christchurch 'Exciting'



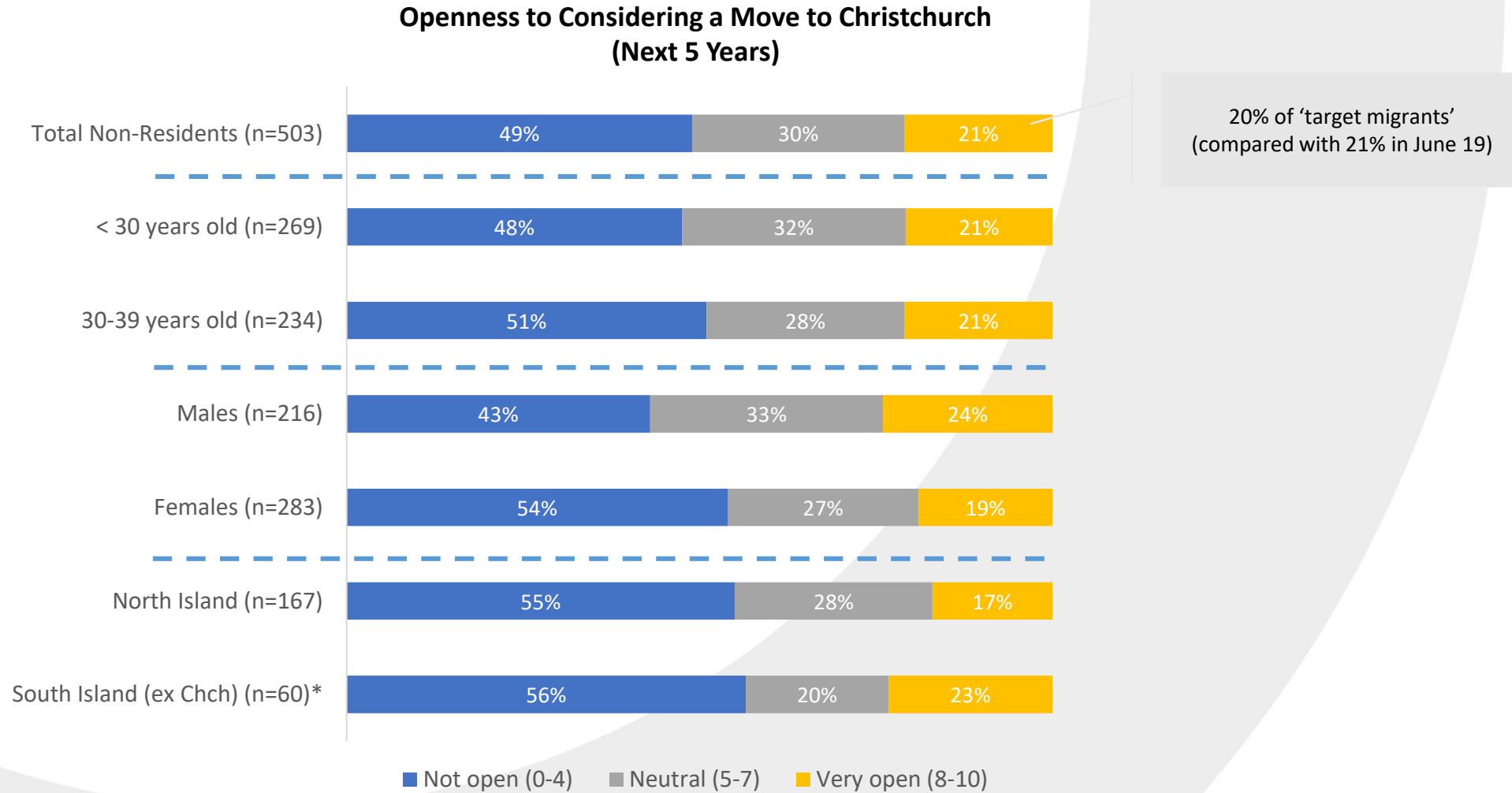
What Makes Christchurch 'Cool'



■ R&R Seekers (n=186)
■ Nature Lovers (n=115)

Attracting Migrants to Christchurch

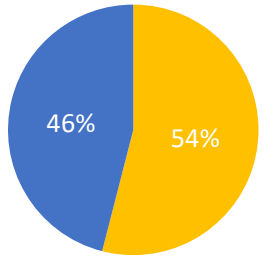
One in five of under 40s are very open to migrating to Christchurch



Target Migrants defined as <40 years; tertiary educated; earning \$60k+ using a sample of ~200

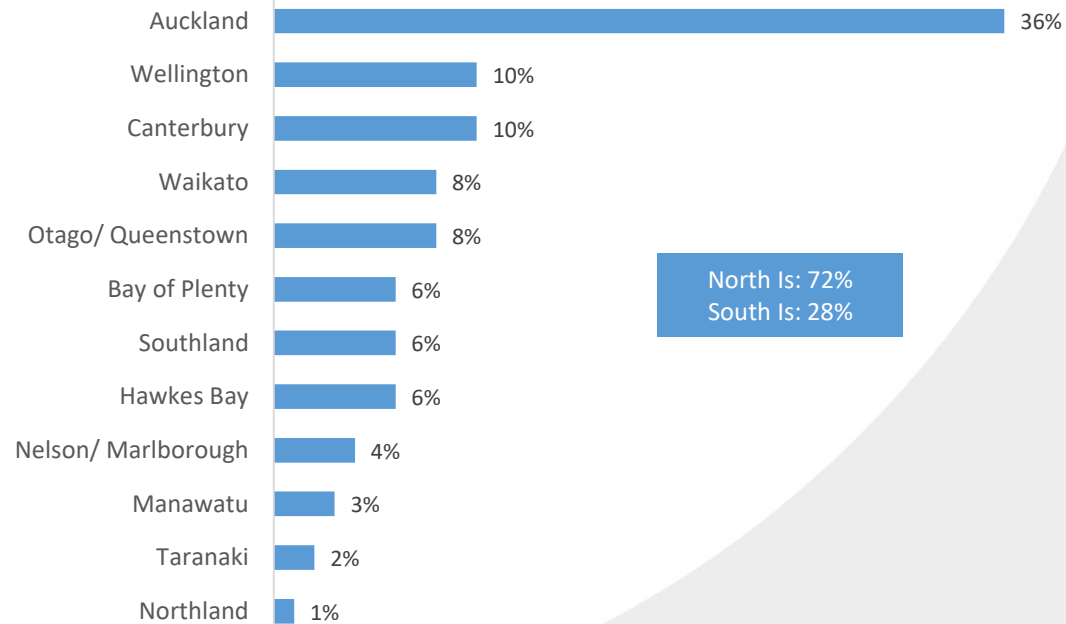
One third of potential migrants are based in Auckland

Gender



Male Female

Location



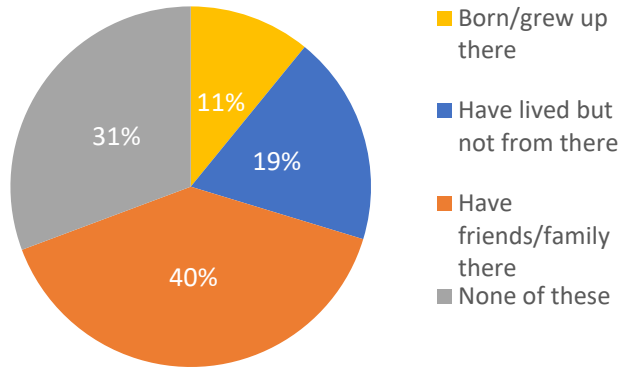
Age



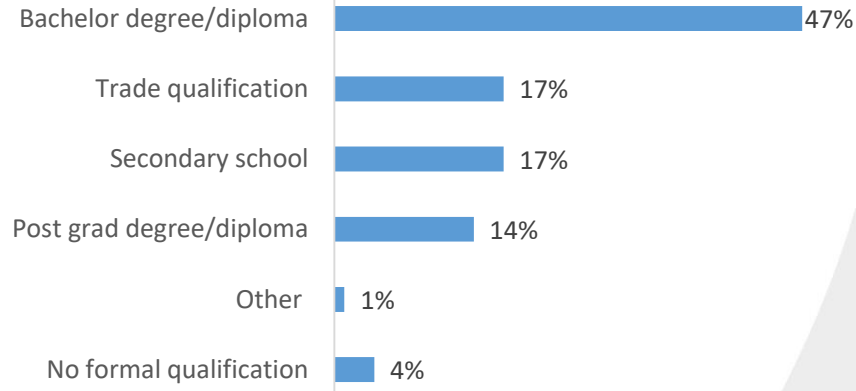
Based on those open to moving to Christchurch in next 5 years (n=100)

Seven in ten potential migrants have some link to Christchurch

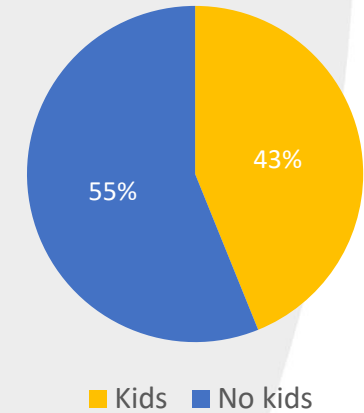
Relationship to Christchurch



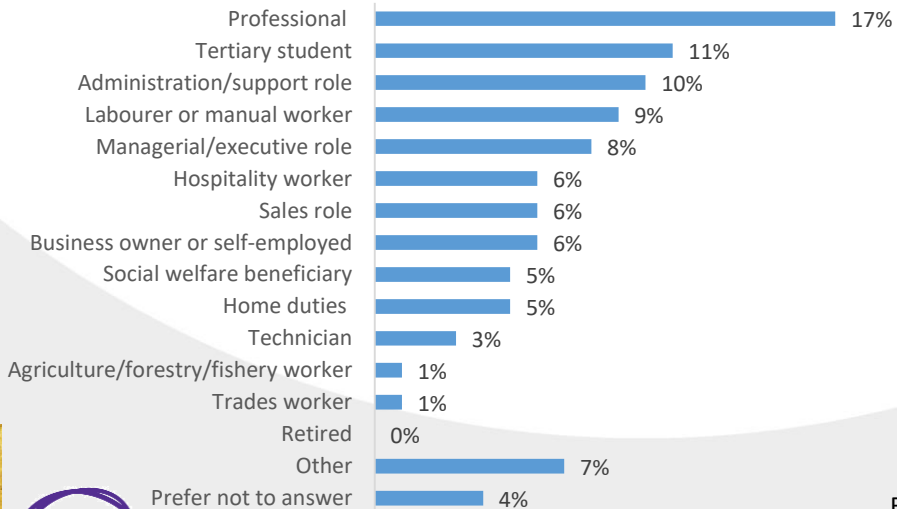
Highest Qualification



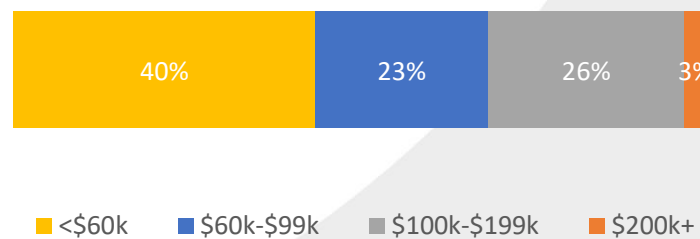
Household Composition



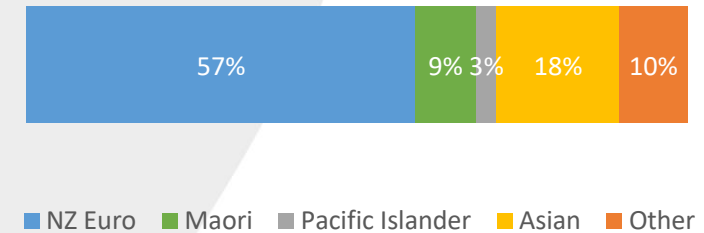
Occupation



Household Income

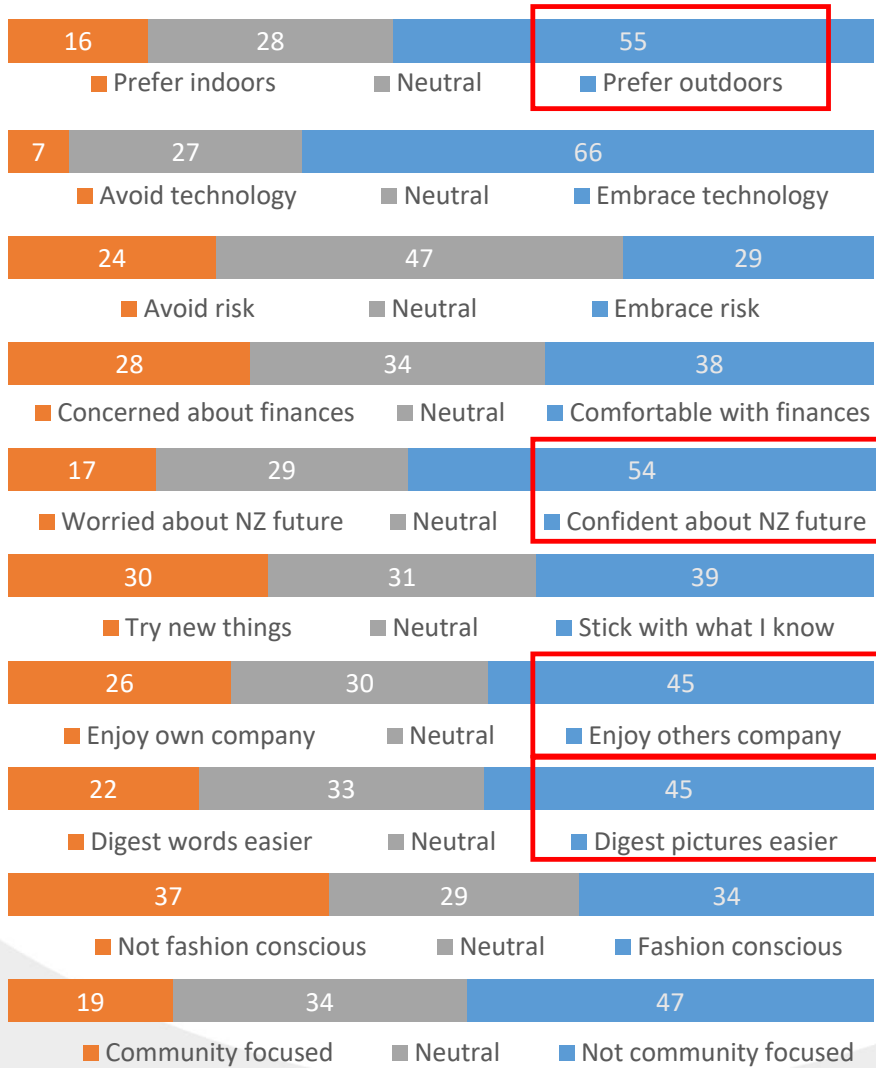


Ethnicity



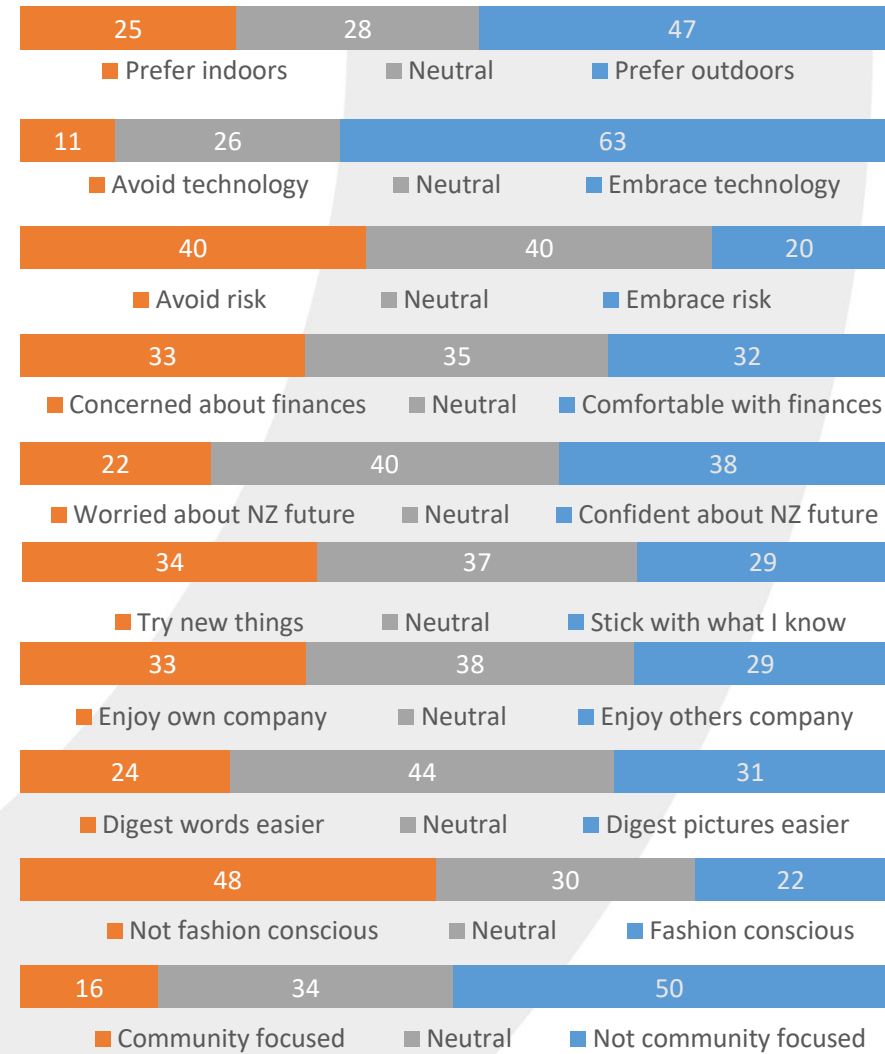
Based on those open to moving to Christchurch in next 5 years (n=100)

Lifestyle Attitudes – Those Open To Moving To Christchurch



Open to moving to Christchurch in next 5 years (rated 8-10) (n=100)

Lifestyle Attitudes – Those Not Open To Moving To Christchurch

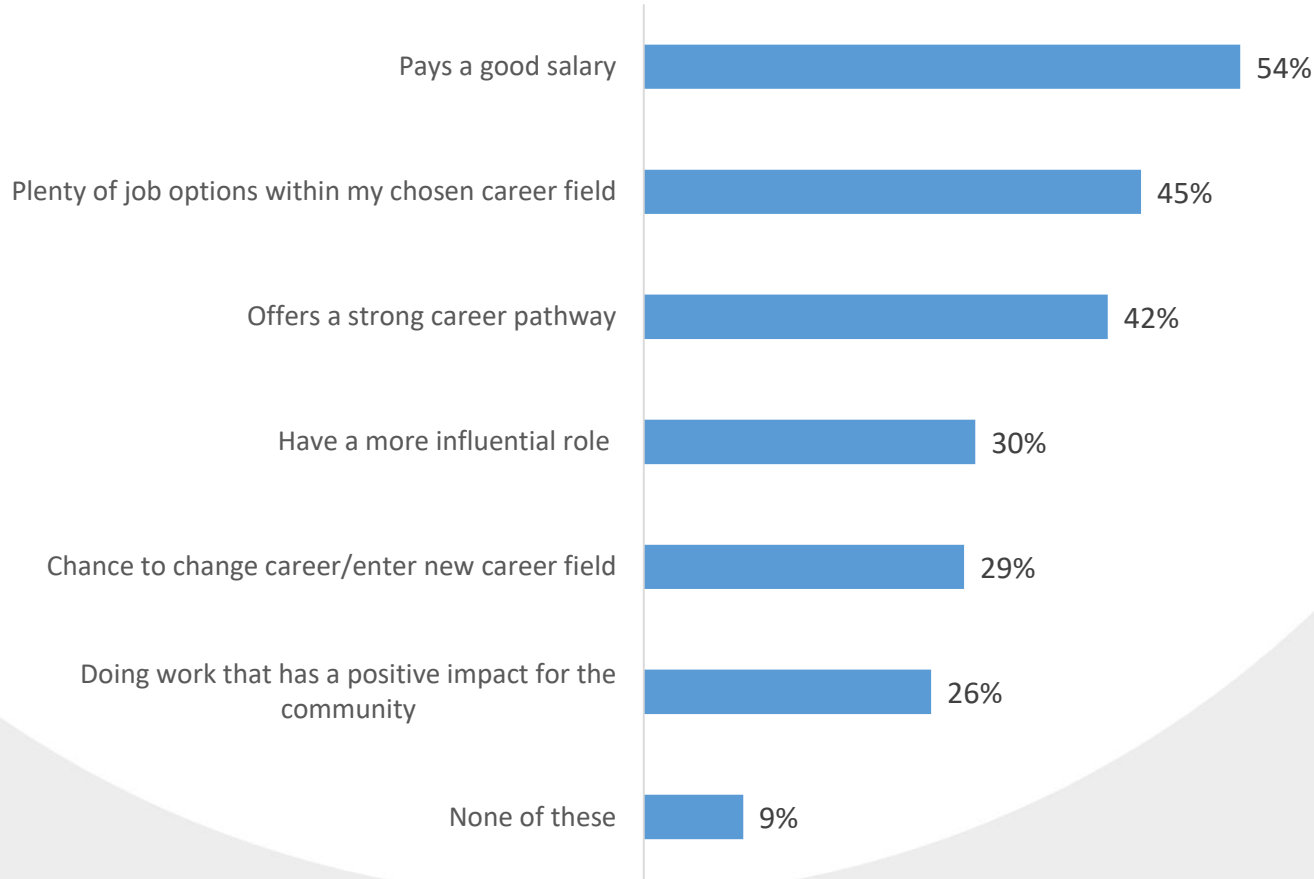


Not open to moving to Christchurch in next 5 years (rated 0-4) (n=252)



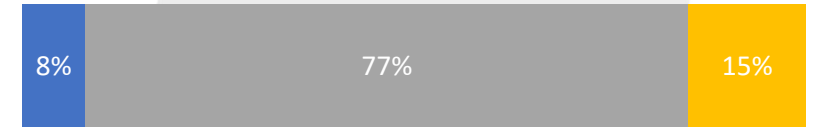
A good salary most strongly equates with good employment opportunity where Christchurch is perceived to be on a par with rest of country

What 'Good Employment Opportunity' Means to Potential Migrants



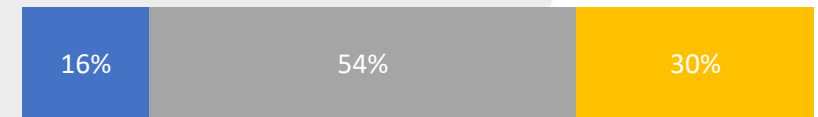
Those open to considering a move to Christchurch in next 5 years (rated 5-10) (n=251)

Rating of Salary Comparability to Rest of NZ



Those open to moving to Christchurch in next 5 years and view a good employment opportunity as being paid a good salary (n=137)

Rating of Job Option Availability Compared to Rest of NZ

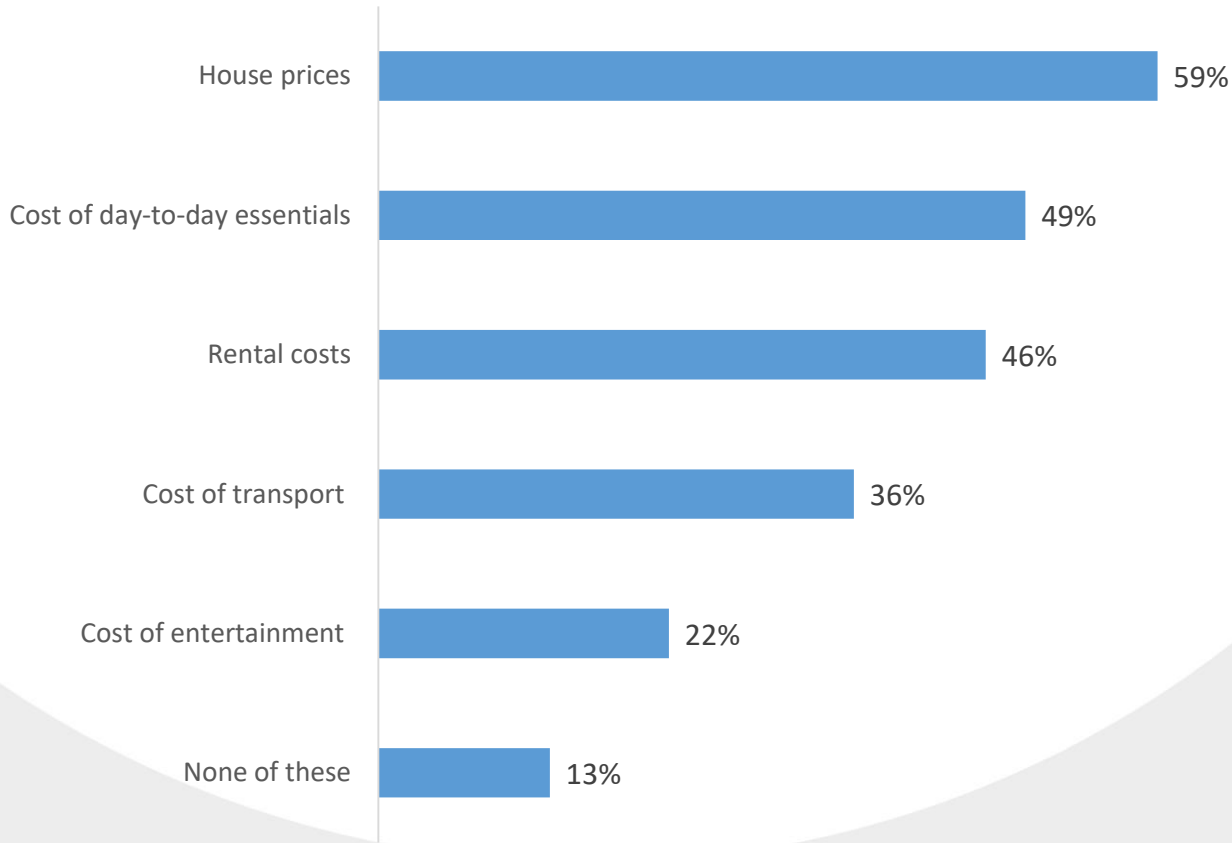


■ Really poorly (0-4) ■ Neutral (5-7) ■ Really well (8-10)

Those open to moving to Christchurch in next 5 years and view a good employment opportunity as having plenty of job options within chosen career field (n=111)

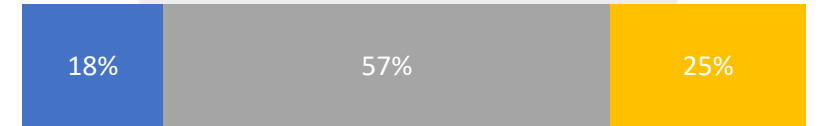
House prices the biggest influence on cost of living while one quarter of potential migrants think Christchurch is great for first home buyers

What 'Better Cost of Living' Means to Potential Migrants



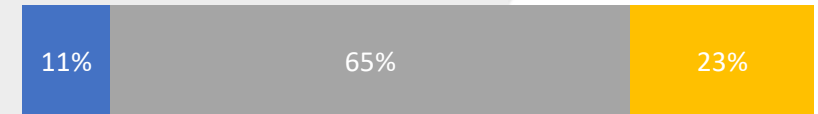
Those open to considering a move to Christchurch in next 5 years (rated 5-10) (n=251)

Rating of Home Ownership Opportunity for First Home Buyers in Christchurch



Those open to moving to Christchurch in next 5 years (n=251)

Rating of Opportunity to Have a Higher Disposable Income in Christchurch

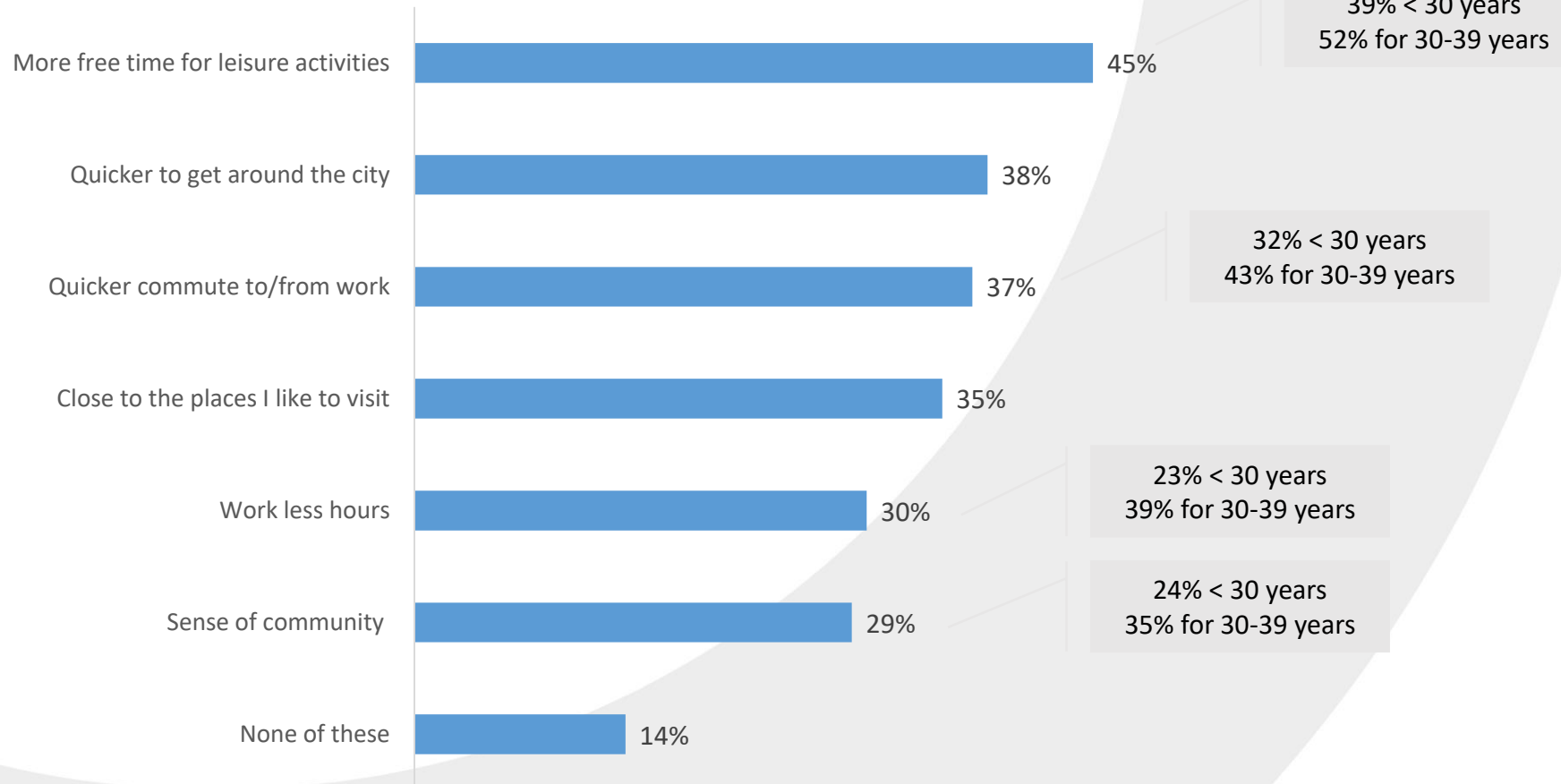


Those open to moving to Christchurch in next 5 years (n=251)

■ Really poorly (0-4) ■ Neutral (5-7) ■ Really great (8-10)

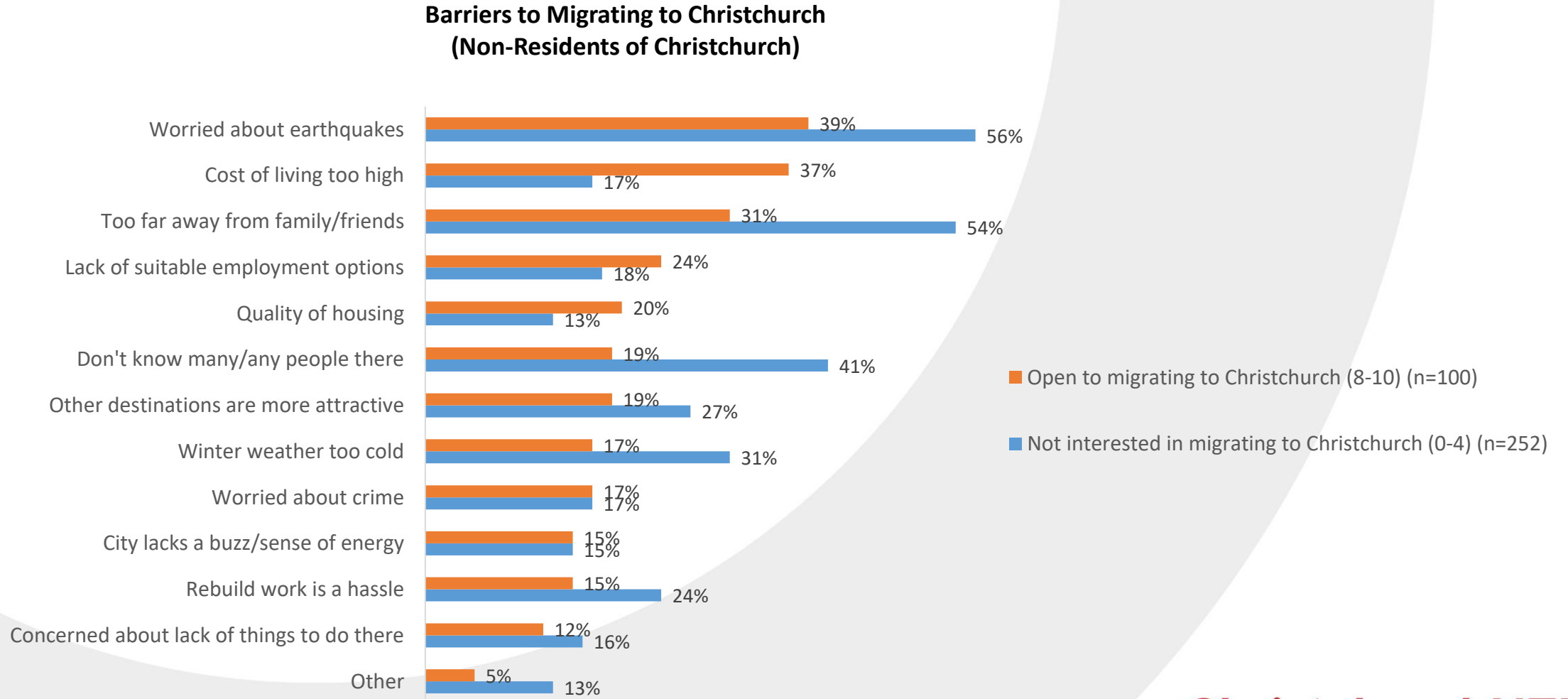
Gaining more leisure time is the strongest descriptor of better work/life balance, especially for those 30-39 years old

What 'Better Work/Life Balance' Means to Potential Migrants



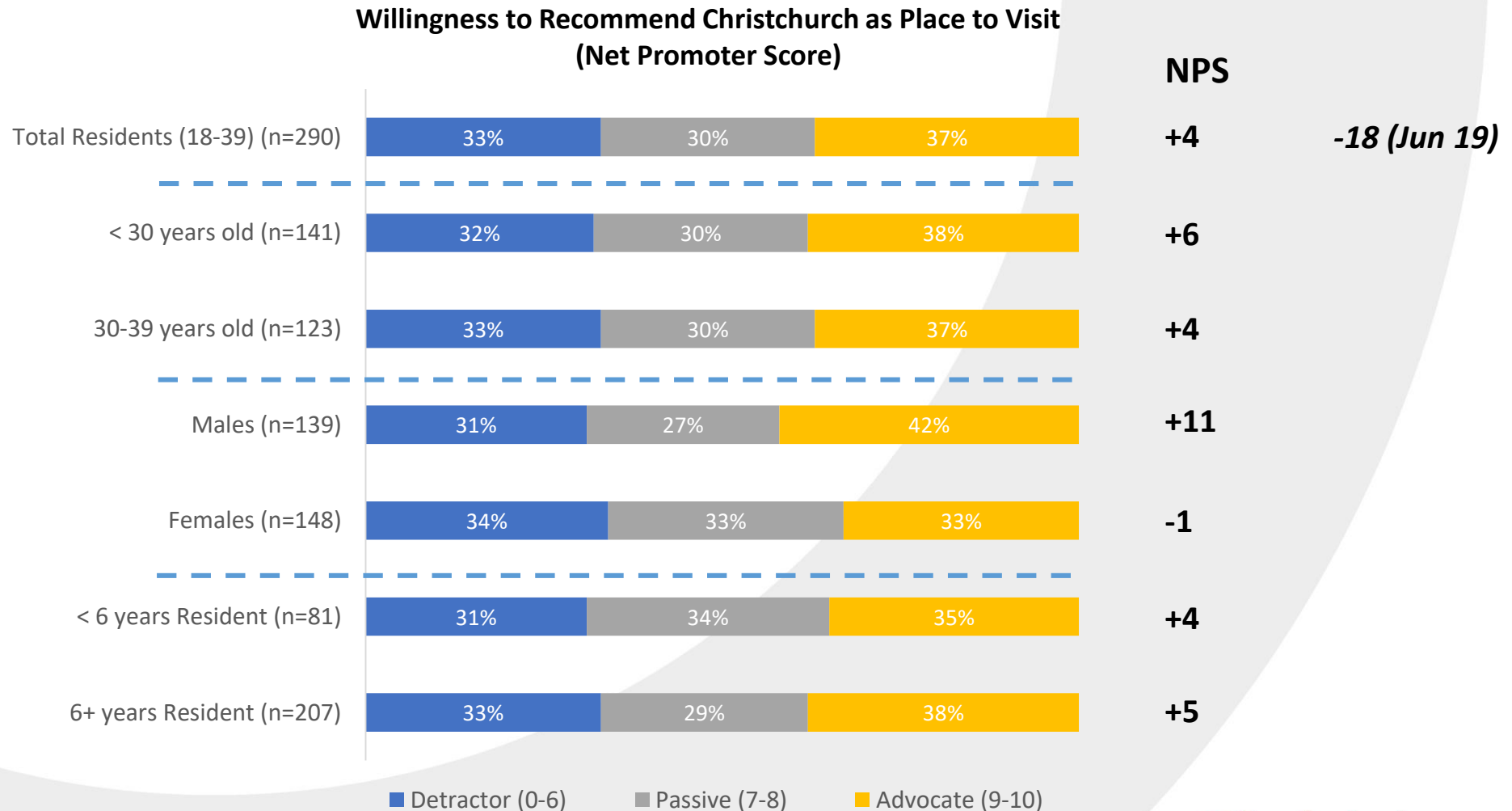
Those open to considering a move to Christchurch in next 5 years (rated 5-10) (n=251)

Earthquakes still loom as a deterrent for some, as well as key fundamentals of cost of living, social network and employment options



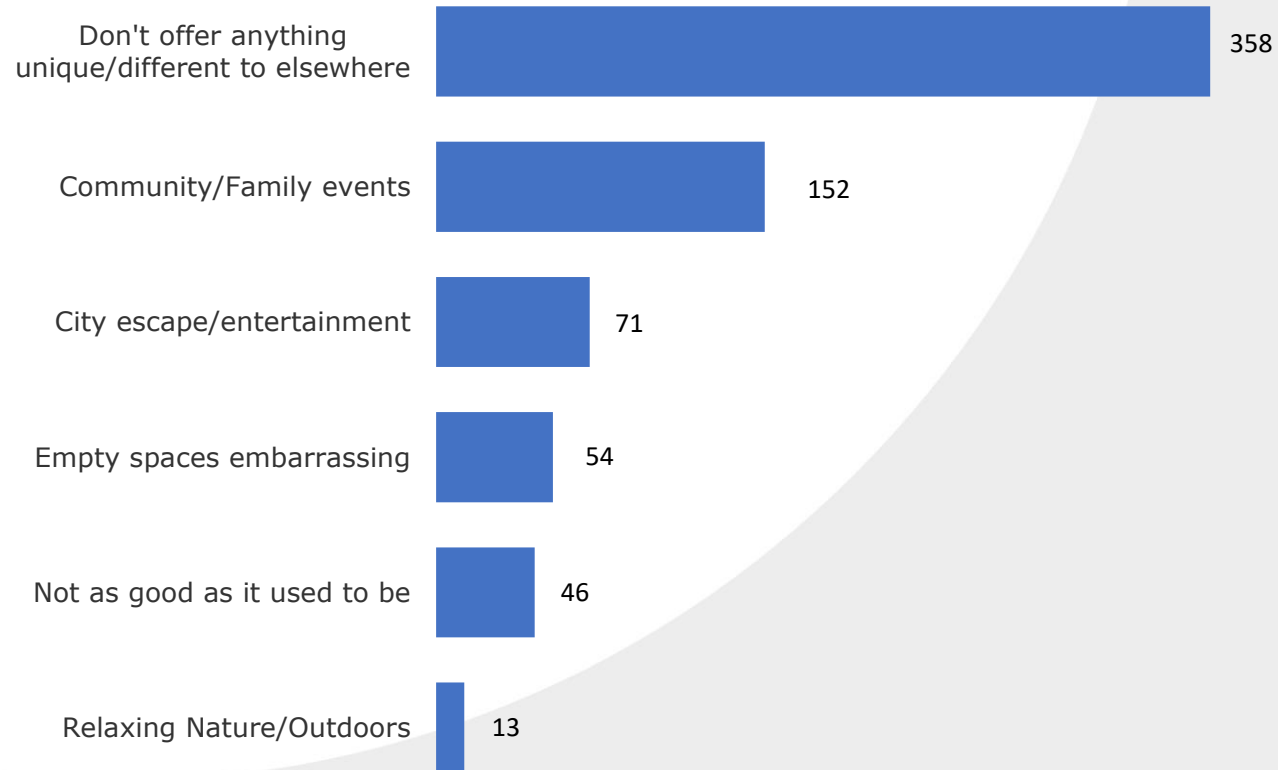
Driving Recommendation amongst Christchurch Residents

Willingness to recommend Christchurch is mediocre with as many detractors as advocates at present



There are some core elements that are hindering residents from recommending the city, however, attracting family and sharing the new entertainment options offer best opportunity

Drivers Influencing Christchurch Residents to Recommend Christchurch as a Place to Visit

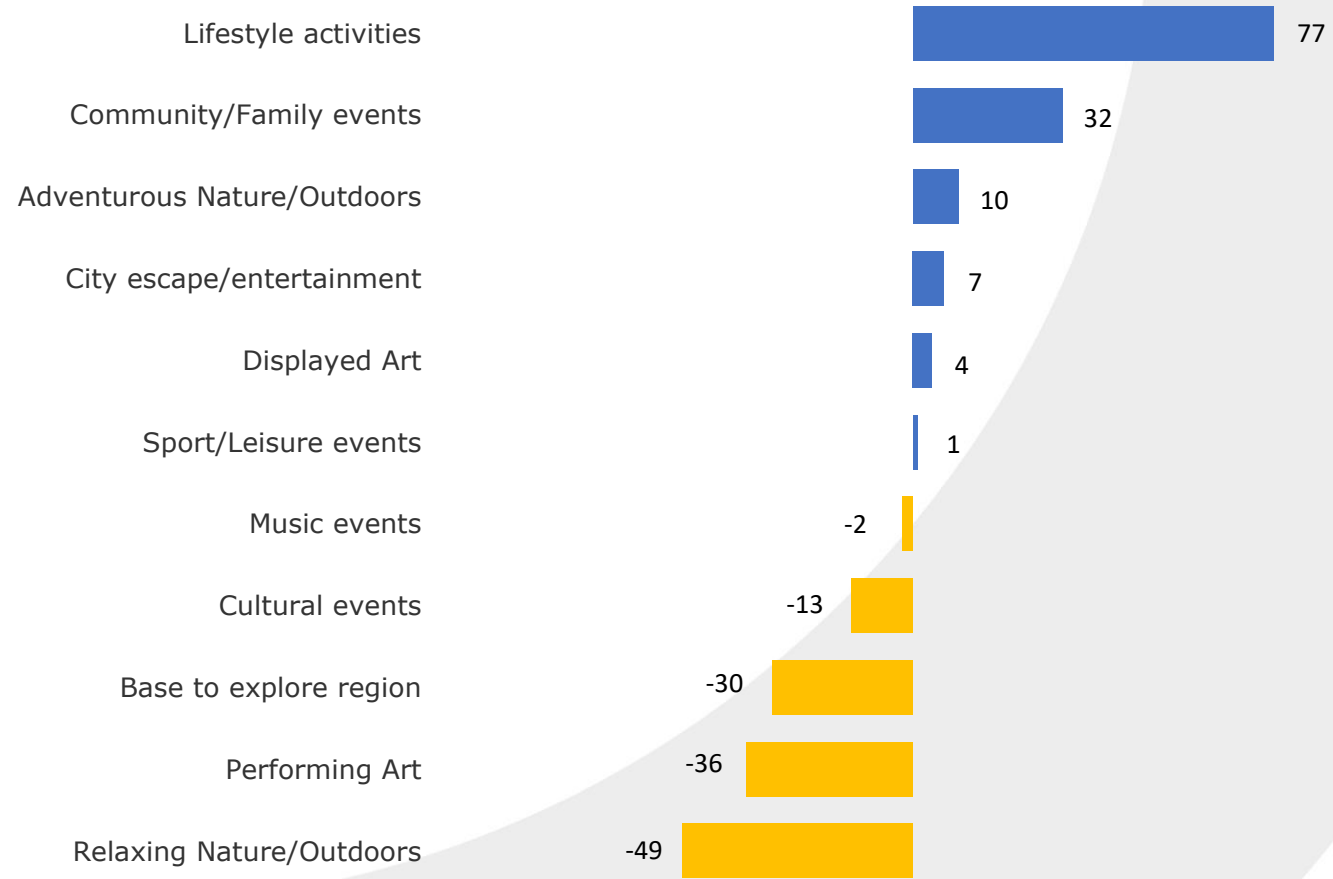


Based on statistical modelling of Christchurch residents (n=290)
Chart depicts attributes with most impact using an index

ChristchurchNZ™

In terms of current activity residents are more willing to promote lifestyle and community/family events

Drivers Influencing Nature of Christchurch Residents Recommendation to Visit Christchurch

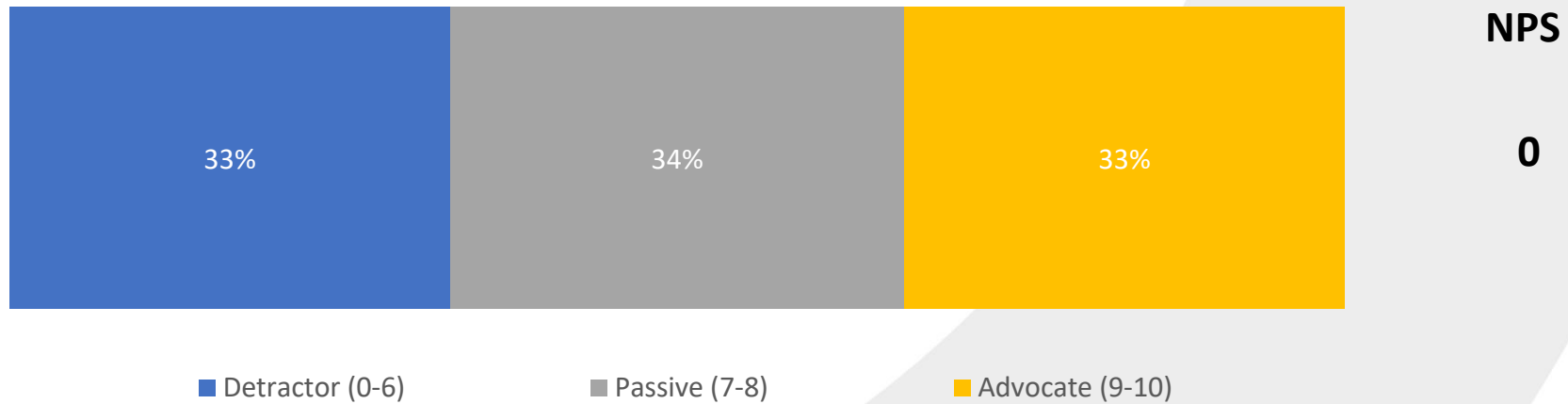


Based on statistical modelling of Christchurch residents (n=290)
Chart depicts attributes with most impact using an index

Residents Supporting Migration to Christchurch

Willingness of residents to recommend Christchurch as a place to live is rather muted

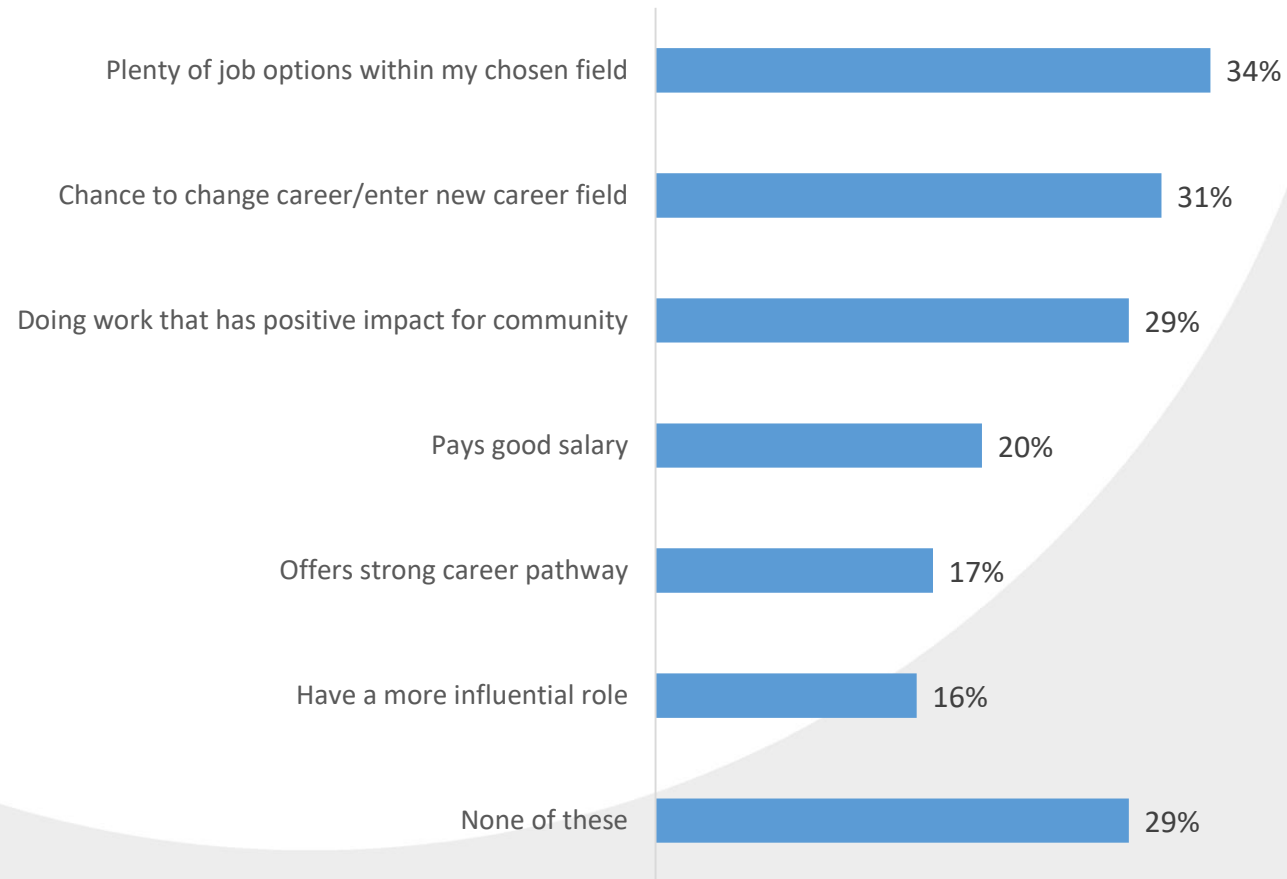
Net Promoter Score for Christchurch as a Place to Live
(Christchurch Residents)



n=290

Residents aren't entirely sure what employment opportunities would attract migrants but focus on actual work type more than salary

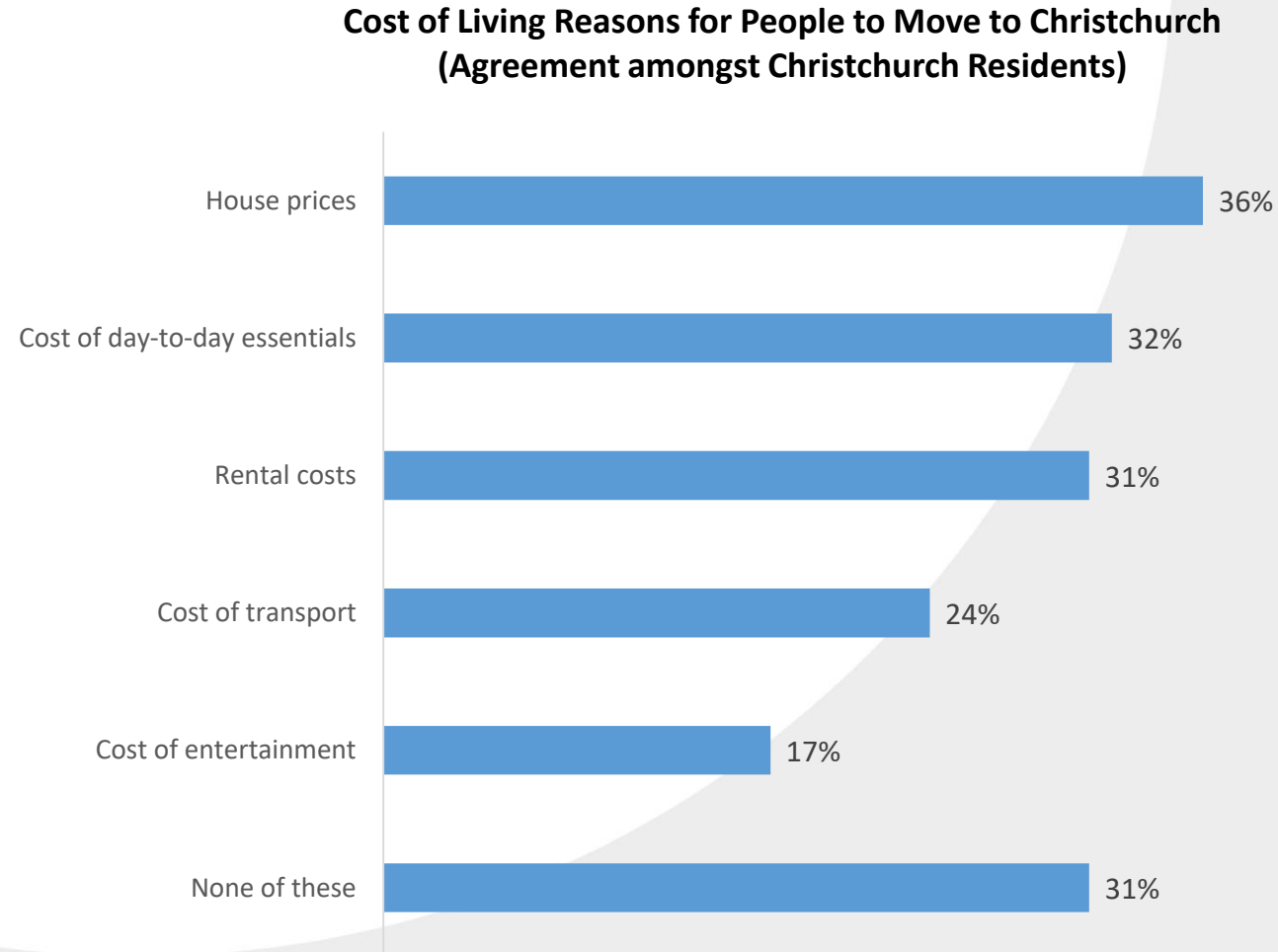
Employment Opportunity Reasons for People to Move to Christchurch
(Agreement amongst Christchurch Residents)



n=290

40

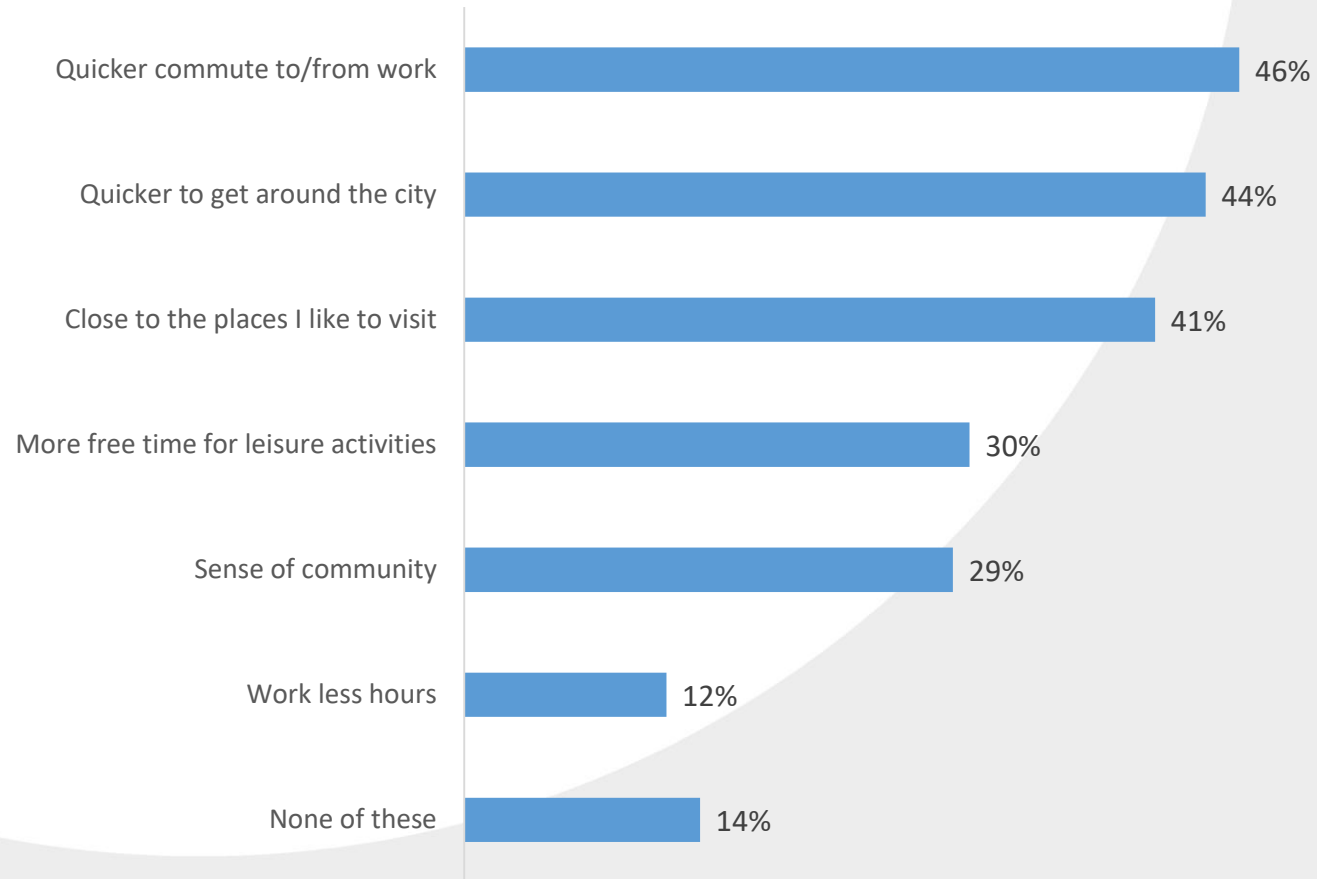
Residents aren't entirely sure what better cost of living for migrants could involve but tend to share similar views as potential migrants



n=290

Residents tend to suggest commuting advantages as offering better work/life balance for potential migrants

Work/Life Balance Reasons For People to Move to Christchurch
(Agreement amongst Christchurch Residents)



n=290



ChristchurchNZ™