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
Describing ‘Beautiful’

Christchurch Residents

- Hagley Park
- Botanic Gardens
- Scenery
- Greens
- Natural
- Cathedral
- Architecture

Christchurch Non-residents

- Hagley Park
- Scenery
- Old Buildings
- Botanic Gardens
- Avon River
- Gardens
- Flowers
- Nature
- Beautiful Scenery
- Natural Beauty
- History
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’?

- Urban nature: 76% (Christchurch Residents), 69% (Non Residents)
- Surrounding natural landscapes: 69% (Christchurch Residents), 53% (Non Residents)
- Heritage architecture: 42% (Christchurch Residents), 33% (Non Residents)
- New city architecture: 30% (Christchurch Residents), 23% (Non Residents)
- Central city layout: 26% (Christchurch Residents), 21% (Non Residents)
- Don’t know: 8% (Christchurch Residents), 2% (Non Residents)
- Don’t think Christchurch is beautiful: 5% (Christchurch Residents), 2% (Non Residents)
Describing ‘Progressive’

Christchurch Residents

Christchurch Non-residents
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’?

- New/modern design: 39% (Christchurch Residents) vs 26% (Non Residents)
- Active community involvement: 33% (Christchurch Residents) vs 27% (Non Residents)
- Innovative/entrepreneurial: 33% (Christchurch Residents) vs 29% (Non Residents)
- Embraces cultural diversity: 25% (Christchurch Residents) vs 29% (Non Residents)
- Supports environmental sustainability: 29% (Christchurch Residents) vs 27% (Non Residents)
- Technologically advanced: 26% (Christchurch Residents) vs 26% (Non Residents)
- Don’t know: 7% (Christchurch Residents) vs 14% (Non Residents)
- None of these: 3% (Christchurch Residents) vs 4% (Non Residents)
- Don’t think Christchurch is progressive: 10% (Christchurch Residents) vs 14% (Non Residents)

Christchurch Residents (n=290) vs Non Residents (n=503)
Describing ‘Exciting’

Christchurch Residents

- Margaret Mahy Playground
- Adventure Activities
- Parks
- New Developments
- New Facilities
- Nightlife
- Always Something Happening
- A Lot To Do
- New Places To Visit
- New Things

Christchurch Non-residents

- Margaret Mahy Playground
- Adventure Activities
- Parks
- New Developments
- New Facilities
- Nightlife
- Always Something Happening
- A Lot To Do
- New Places To Visit
- New Things
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’?

- Outdoor enjoyment
- Promising future
- Lively
- New
- Sense of opportunity
- Different
- Don’t know
- None of these
- Don’t think Christchurch is exciting

Christchurch Residents (n=290)  Non Residents (n=503)
Describing ‘Cool’

Christchurch Residents

Christchurch Non-residents
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’?

- Relaxed/chilled: 58% (Christchurch Residents) 41% (Non Residents)
- Contemporary: 30% (Christchurch Residents) 24% (Non Residents)
- Edgy: 17% (Christchurch Residents) 19% (Non Residents)
- Understated: 18% (Christchurch Residents) 12% (Non Residents)
- Eclectic: 15% (Christchurch Residents) 17% (Non Residents)
- Undiscovered: 11% (Christchurch Residents) 12% (Non Residents)
- Don’t know: 11% (Christchurch Residents) 4% (Non Residents)
- None of these: 6% (Christchurch Residents) 4% (Non Residents)
- Don’t think Christchurch is cool: 17% (Christchurch Residents) 12% (Non Residents)
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

<table>
<thead>
<tr>
<th>Destination</th>
<th>Intended (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Christchurch City</td>
<td>79%</td>
</tr>
<tr>
<td>Hanmer Springs</td>
<td>28%</td>
</tr>
<tr>
<td>Aoraki/Mt Cook</td>
<td>24%</td>
</tr>
<tr>
<td>Lake Tekapo/ Mackenzie Country</td>
<td>24%</td>
</tr>
<tr>
<td>Kaikoura</td>
<td>20%</td>
</tr>
<tr>
<td>Akaroa</td>
<td>17%</td>
</tr>
<tr>
<td>Arthur's Pass</td>
<td>17%</td>
</tr>
<tr>
<td>Mt Hutt/ Methven</td>
<td>10%</td>
</tr>
<tr>
<td>Ashburton</td>
<td>8%</td>
</tr>
<tr>
<td>Other</td>
<td>9%</td>
</tr>
</tbody>
</table>

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)

- Friends/family who live there recommended: 44%
- Friends/family who visited there recommended: 43%
- Required to go there (e.g attend event): 28%
- Great travel deal (e.g grabaseat): 19%
- Read positive reviews (e.g TripAdvisor): 17%
- Internet search: 14%
- Saw advertising highlighting attractions: 11%
- Article in newspaper/magazine: 8%
- Other: 4%
- Don't know: 5%
- Haven't travelled in last 12 mths: 9%

n=503
Clear alignment between what potential visitors are seeking from Christchurch and what they have travelled for previously.

<table>
<thead>
<tr>
<th>Reason</th>
<th>Would encourage a visit to Christchurch</th>
<th>Have travelled beyond region to experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxing nature/ outdoors</td>
<td>37%</td>
<td>32%</td>
</tr>
<tr>
<td>City escape/entertainment</td>
<td>27%</td>
<td>25%</td>
</tr>
<tr>
<td>Music events</td>
<td>22%</td>
<td>26%</td>
</tr>
<tr>
<td>Base to explore region</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Adventurous Nature/Outdoors</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>Lifestyle activities</td>
<td>22%</td>
<td>17%</td>
</tr>
<tr>
<td>Community/Family events</td>
<td>25%</td>
<td>22%</td>
</tr>
<tr>
<td>Sport/Leisure events</td>
<td>16%</td>
<td>16%</td>
</tr>
<tr>
<td>Cultural events</td>
<td>12%</td>
<td>12%</td>
</tr>
<tr>
<td>Displayed Art</td>
<td>7%</td>
<td>11%</td>
</tr>
<tr>
<td>Performing Art</td>
<td>10%</td>
<td>9%</td>
</tr>
<tr>
<td>None of these</td>
<td>22%</td>
<td>31%</td>
</tr>
</tbody>
</table>

*Would encourage a visit to Christchurch

*Have travelled beyond region to experience

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

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

<table>
<thead>
<tr>
<th>Preference</th>
<th>Score</th>
<th>Neutral</th>
<th>Agree</th>
<th>Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer indoors</td>
<td>21</td>
<td>24</td>
<td>55</td>
<td></td>
</tr>
<tr>
<td>Avoid technology</td>
<td>3</td>
<td>31</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>Avoid risk</td>
<td>34</td>
<td>47</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>Concerned about finances</td>
<td>31</td>
<td>35</td>
<td>34</td>
<td></td>
</tr>
<tr>
<td>Worried about NZ future</td>
<td>19</td>
<td>33</td>
<td>48</td>
<td></td>
</tr>
<tr>
<td>Try new things</td>
<td>34</td>
<td>39</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>Enjoy own company</td>
<td>33</td>
<td>37</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>Digest words easier</td>
<td>28</td>
<td>40</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Not fashion conscious</td>
<td>46</td>
<td>28</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>Community focused</td>
<td>12</td>
<td>36</td>
<td>52</td>
<td></td>
</tr>
</tbody>
</table>

### Lifestyle Attitudes – Not Interested in Visiting Christchurch

<table>
<thead>
<tr>
<th>Preference</th>
<th>Score</th>
<th>Neutral</th>
<th>Agree</th>
<th>Oppose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer indoors</td>
<td>20</td>
<td>38</td>
<td>43</td>
<td></td>
</tr>
<tr>
<td>Avoid technology</td>
<td>12</td>
<td>30</td>
<td>59</td>
<td></td>
</tr>
<tr>
<td>Avoid risk</td>
<td>35</td>
<td>44</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>Concerned about finances</td>
<td>29</td>
<td>41</td>
<td>30</td>
<td></td>
</tr>
<tr>
<td>Worried about NZ future</td>
<td>19</td>
<td>33</td>
<td>48</td>
<td></td>
</tr>
<tr>
<td>Try new things</td>
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</tr>
<tr>
<td>Enjoy own company</td>
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<td>40</td>
<td>32</td>
<td></td>
</tr>
<tr>
<td>Digest words easier</td>
<td>43</td>
<td>32</td>
<td>25</td>
<td></td>
</tr>
<tr>
<td>Not fashion conscious</td>
<td>19</td>
<td>37</td>
<td>44</td>
<td></td>
</tr>
</tbody>
</table>

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

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.

### Biggest Motivation For Travel (Non-Residents of Christchurch)

<table>
<thead>
<tr>
<th>Motivation</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>To relax and escape everyday life</td>
<td>37%</td>
</tr>
<tr>
<td>To enjoy great scenery/natural beauty</td>
<td>22%</td>
</tr>
<tr>
<td>To seek activities/entertainment</td>
<td>13%</td>
</tr>
<tr>
<td>To increase my knowledge/learn new things</td>
<td>13%</td>
</tr>
<tr>
<td>To explore the latest/newest/popular destinations</td>
<td>9%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>6%</td>
</tr>
</tbody>
</table>

n=503
Female skew to target segments with half of Nature Lovers in Auckland

Nature Lovers: 55% Female, 44% Male, 1% Gender diverse

R&R Seekers: 47% Female, 53% Male, 0% Gender diverse

Age:
- 18-24 years: Nature Lovers 22%, R&R Seekers 24%
- 25-29 years: Nature Lovers 29%, R&R Seekers 29%
- 30-34 years: Nature Lovers 27%, R&R Seekers 28%
- 35-39 years: Nature Lovers 22%, R&R Seekers 18%

Gender:
- R&R Seekers: 53% Male, 47% Female
- Nature Lovers: 55% Female, 44% Male

Household Income:
- <$60k: Nature Lovers 30%, R&R Seekers 32%
- $60k-$99k: Nature Lovers 27%, R&R Seekers 29%
- $100k-$199k: Nature Lovers 20%, R&R Seekers 24%
- $200k+: Nature Lovers 4%, R&R Seekers 5%

Location:
- Auckland: Nature Lovers 9%, R&R Seekers 10%
- Wellington: Nature Lovers 6%, R&R Seekers 6%
- Bay of Plenty: Nature Lovers 5%, R&R Seekers 4%
- Nelson/ Marlborough: Nature Lovers 1%, R&R Seekers 2%
- Southland: Nature Lovers 4%, R&R Seekers 3%
- Manawatu: Nature Lovers 35%, R&R Seekers 9%
- Taranaki: Nature Lovers 2%, R&R Seekers 2%
- Canterbury: Nature Lovers 2%, R&R Seekers 2%
- Whanganui: Nature Lovers 1%, R&R Seekers 1%
- Hawkes Bay: Nature Lovers 3%, R&R Seekers 4%
- Northland: Nature Lovers 0%, R&R Seekers 1%
- Taranaki: Nature Lovers 1%, R&R Seekers 1%
- Waipara: Nature Lovers 1%, R&R Seekers 1%

Ethnicity:
- Nature Lovers: NZ Euro 64%, Maori 15%, Pacific Islander 10%, Asian 12%, Other 18%
- R&R Seekers: NZ Euro 62%, Maori 7%, Pacific Islander 10%, Asian 12%, Other 18%

Household Composition:
- Nature Lovers: 55% Kids in household, 45% No kids in household
- R&R Seekers: 52% Kids in household, 48% No kids in household

Location:
- Auckland: Nature Lovers 29%, R&R Seekers 22%
- North Is: Nature Lovers 78%, South Is: 22%
- South Is: Nature Lovers 16%, North Is: 84%

Gender:
- Auckland: Nature Lovers 15%, R&R Seekers 14%
- North Is: Nature Lovers 84%, South Is: 16%
- South Is: Nature Lovers 78%, North Is: 22%
Nature Lovers show a stronger intention to visit Christchurch

**Intentions to Visit Christchurch**
- 23% plan to visit Canterbury in next 12 months
- 83% conversion
- 19% will visit Christchurch in next 12 months
- 36% plan to visit Canterbury in next 12 months
- 72% conversion
- 26% will visit Christchurch in next 12 months

**Motivators for Visiting Christchurch in Next 12 Months**
- Relaxing Nature/Outdoors: 38%
- City escape/entertainment: 33%
- Community/Family events: 27%
- Base to explore region: 31%
- Music events: 27%
- Lifestyle activities: 30%
- Adventurous Nature/Outdoors: 37%
- Sport/Leisure events: 14%
- Displayed Art: 12%
- Performing Art: 10%
- Cultural events: 19%
- None of these: 26%

**Relationship with Christchurch**
- Only one option could be selected
  - Have family/friends living in Christchurch: 35% (R&R Seekers: 40%)
  - Lived in Christchurch but not from there: 7% (R&R Seekers: 9%)
  - Born/grew up in Christchurch: 5% (R&R Seekers: 4%)
  - None of these: 53% (R&R Seekers: 48%)

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

Canterbury: 23% plan to visit in next 12 months
Christchurch: 26% plan to visit in next 12 months

83% conversion to visit Canterbury in next 12 months
72% conversion to visit Christchurch in next 12 months

Canterbury: 26% will visit in next 12 months
Christchurch: 23% will visit in next 12 months

72% conversion to visit Canterbury
72% conversion to visit Christchurch

83% who will visit Canterbury in next 12 months will visit Christchurch in next 12 months
72% who will visit Christchurch in next 12 months will visit Canterbury in next 12 months
Lifestyle Attitudes – R&R Seekers

- Prefer indoors: 34, Neutral: 41, Prefer outdoors: 25
- Avoid technology: 32, Neutral: 60, Embrace technology: 8
- Avoid risk: 38, Neutral: 41, Embrace risk: 21
- Concerned about finances: 39, Neutral: 35, Comfortable with finances: 27
- Worried about NZ future: 43, Neutral: 39, Confident about NZ future: 17
- Try new things: 33, Neutral: 33, Stick with what I know: 29
- Enjoy own company: 42, Neutral: 29, Enjoy others company: 24
- Digest words easier: 31, Neutral: 47, Digest pictures easier: 22
- Not fashion conscious: 31, Neutral: 22, Fashion conscious: 47
- Community focused: 48, Neutral: 36, Not community focused: 16

Those motivated to travel to escape/relax n=186

Lifestyle Attitudes - Nature Lovers

- Prefer indoors: 32, Neutral: 60, Prefer outdoors: 8
- Avoid technology: 19, Neutral: 68, Embrace technology: 14
- Avoid risk: 38, Neutral: 23, Embrace risk: 39
- Concerned about finances: 39, Neutral: 35, Comfortable with finances: 26
- Worried about NZ future: 28, Neutral: 55, Confident about NZ future: 17
- Try new things: 32, Neutral: 27, Stick with what I know: 24
- Enjoy own company: 38, Neutral: 33, Enjoy others company: 24
- Digest words easier: 31, Neutral: 29, Digest pictures easier: 42
- Not fashion conscious: 30, Neutral: 31, Fashion conscious: 39
- Community focused: 42, Neutral: 48, Not community focused: 16

Those motivated to travel to enjoy nature n=115
Similar perceptions amongst target segments although Nature Lovers accentuate the outdoors

### What Makes Christchurch ‘Beautiful’

<table>
<thead>
<tr>
<th>Feature</th>
<th>Nature Lovers</th>
<th>R&amp;R Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Urban nature</td>
<td>55%</td>
<td>53%</td>
</tr>
<tr>
<td>Heritage architecture</td>
<td>51%</td>
<td>36%</td>
</tr>
<tr>
<td>Surrounding natural landscapes</td>
<td>49%</td>
<td>24%</td>
</tr>
<tr>
<td>New city architecture</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>Central city layout</td>
<td>23%</td>
<td>16%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>8%</td>
<td>6%</td>
</tr>
<tr>
<td>Don’t think Christchurch is beautiful</td>
<td>2%</td>
<td>2%</td>
</tr>
</tbody>
</table>

### What Makes Christchurch ‘Progressive’

<table>
<thead>
<tr>
<th>Feature</th>
<th>Nature Lovers</th>
<th>R&amp;R Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>New/modern design</td>
<td>43%</td>
<td>38%</td>
</tr>
<tr>
<td>Supports environmental sustainability</td>
<td>36%</td>
<td>27%</td>
</tr>
<tr>
<td>Active community involvement</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Embraces cultural diversity</td>
<td>25%</td>
<td>19%</td>
</tr>
<tr>
<td>Innovative/entrepreneurial</td>
<td>20%</td>
<td>18%</td>
</tr>
<tr>
<td>Technologically advanced</td>
<td>26%</td>
<td>26%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>19%</td>
<td>14%</td>
</tr>
<tr>
<td>None of these</td>
<td>14%</td>
<td>11%</td>
</tr>
<tr>
<td>Don’t think Christchurch is progressive</td>
<td>7%</td>
<td>4%</td>
</tr>
</tbody>
</table>

### What Makes Christchurch ‘Exciting’

<table>
<thead>
<tr>
<th>Feature</th>
<th>Nature Lovers</th>
<th>R&amp;R Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Outdoor enjoyment</td>
<td>45%</td>
<td>32%</td>
</tr>
<tr>
<td>Promising future</td>
<td>33%</td>
<td>26%</td>
</tr>
<tr>
<td>Sense of opportunity</td>
<td>32%</td>
<td>26%</td>
</tr>
<tr>
<td>Lively</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Different</td>
<td>26%</td>
<td>25%</td>
</tr>
<tr>
<td>New</td>
<td>22%</td>
<td>15%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>9%</td>
<td>5%</td>
</tr>
<tr>
<td>None of these</td>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>Don’t think Christchurch is exciting</td>
<td>15%</td>
<td>15%</td>
</tr>
</tbody>
</table>

### What Makes Christchurch ‘Cool’

<table>
<thead>
<tr>
<th>Feature</th>
<th>Nature Lovers</th>
<th>R&amp;R Seekers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Relaxed/chilled</td>
<td>45%</td>
<td>23%</td>
</tr>
<tr>
<td>Contemporary</td>
<td>23%</td>
<td>18%</td>
</tr>
<tr>
<td>Edgy</td>
<td>17%</td>
<td>15%</td>
</tr>
<tr>
<td>Eclectic</td>
<td>15%</td>
<td>13%</td>
</tr>
<tr>
<td>Understated</td>
<td>13%</td>
<td>13%</td>
</tr>
<tr>
<td>Undiscovered</td>
<td>13%</td>
<td>11%</td>
</tr>
<tr>
<td>Don’t know</td>
<td>12%</td>
<td>7%</td>
</tr>
<tr>
<td>None of these</td>
<td>2%</td>
<td>7%</td>
</tr>
<tr>
<td>Don’t think Christchurch is cool</td>
<td>14%</td>
<td>14%</td>
</tr>
</tbody>
</table>
Attracting Migrants to Christchurch
One in five of under 40s are very open to migrating to Christchurch

**Openness to Considering a Move to Christchurch (Next 5 Years)**

<table>
<thead>
<tr>
<th>Category</th>
<th>Very open (8-10)</th>
<th>Neutral (5-7)</th>
<th>Not open (0-4)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Non-Residents (n=503)</td>
<td>49%</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td>&lt; 30 years old (n=269)</td>
<td>48%</td>
<td>32%</td>
<td>21%</td>
</tr>
<tr>
<td>30-39 years old (n=234)</td>
<td>51%</td>
<td>28%</td>
<td>21%</td>
</tr>
<tr>
<td>Males (n=216)</td>
<td>43%</td>
<td>33%</td>
<td>24%</td>
</tr>
<tr>
<td>Females (n=283)</td>
<td>54%</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>North Island (n=167)</td>
<td>55%</td>
<td>28%</td>
<td>17%</td>
</tr>
<tr>
<td>South Island (ex Chch) (n=60)*</td>
<td>56%</td>
<td>20%</td>
<td>23%</td>
</tr>
</tbody>
</table>

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: 46% Male, 54% Female
- Age:
  - < 30 years: 53%
  - 30-39 years: 47%
- Location:
  - North Is: 72%
  - South Is: 28%

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**
  - Born/grew up there: 31%
  - Have lived but not from there: 11%
  - Have friends/family there: 19%
  - None of these: 40%

- **Highest Qualification**
  - Bachelor degree/diploma: 47%
  - Trade qualification: 17%
  - Secondary school: 17%
  - Post grad degree/diploma: 14%
  - Other: 1%
  - No formal qualification: 4%

- **Highest Qualification**
  - Occupation:
    - Professional: 17%
    - Tertiary student: 11%
    - Administration/support role: 10%
    - Labourer or manual worker: 9%
    - Managerial/executive role: 8%
    - Hospitality worker: 6%
    - Sales role: 6%
    - Business owner or self-employed: 6%
    - Social welfare beneficiary: 5%
    - Home duties: 5%
    - Technician: 3%
    - Agriculture/forestry/fishery worker: 3%
    - Trades worker: 2%
    - Retired: 2%
    - Other: 2%
    - Prefer not to answer: 4%

- **Household Income**
  - <$60k: 40%
  - $60k-$99k: 23%
  - $100k-$199k: 26%
  - $200k+: 3%

- **Household Composition**
  - Kids: 55%
  - No kids: 43%

- **Ethnicity**
  - NZ Euro: 57%
  - Maori: 9%
  - Pacific Islander: 3%
  - Asian: 18%
  - Other: 10%

Based on those open to moving to Christchurch in next 5 years (n=100)
### Lifestyle Attitudes – Those Open To Moving To Christchurch

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Open to moving</th>
<th>Not Open to moving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer indoors</td>
<td>16</td>
<td>28</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enjoy own company</td>
<td>7</td>
<td>27</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Avoid technology</td>
<td>24</td>
<td>47</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Embrace technology</td>
<td>29</td>
<td>66</td>
</tr>
<tr>
<td>Concerned about finances</td>
<td>28</td>
<td>34</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comfortable with finances</td>
<td>34</td>
<td>38</td>
</tr>
<tr>
<td>Worried about NZ future</td>
<td>17</td>
<td>29</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confident about NZ future</td>
<td>54</td>
<td>54</td>
</tr>
<tr>
<td>Try new things</td>
<td>30</td>
<td>31</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stick with what I know</td>
<td>39</td>
<td>39</td>
</tr>
<tr>
<td>Enjoy own company</td>
<td>26</td>
<td>30</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enjoy others company</td>
<td>45</td>
<td>45</td>
</tr>
<tr>
<td>Digest words easier</td>
<td>37</td>
<td>29</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digest pictures easier</td>
<td>34</td>
<td>34</td>
</tr>
<tr>
<td>Not fashion conscious</td>
<td>19</td>
<td>34</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fashion conscious</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Community focused</td>
<td>16</td>
<td>34</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not community focused</td>
<td>47</td>
<td>47</td>
</tr>
</tbody>
</table>

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

### Lifestyle Attitudes – Those Not Open To Moving To Christchurch

<table>
<thead>
<tr>
<th>Attitude</th>
<th>Open to moving</th>
<th>Not Open to moving</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prefer indoors</td>
<td>25</td>
<td>28</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Prefer outdoors</td>
<td>47</td>
<td>47</td>
</tr>
<tr>
<td>Avoid technology</td>
<td>11</td>
<td>26</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Embrace technology</td>
<td>63</td>
<td>63</td>
</tr>
<tr>
<td>Concerned about finances</td>
<td>40</td>
<td>40</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comfortable with finances</td>
<td>20</td>
<td>20</td>
</tr>
<tr>
<td>Worried about NZ future</td>
<td>33</td>
<td>35</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Confident about NZ future</td>
<td>32</td>
<td>32</td>
</tr>
<tr>
<td>Try new things</td>
<td>34</td>
<td>37</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Stick with what I know</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Enjoy own company</td>
<td>33</td>
<td>38</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Enjoy others company</td>
<td>29</td>
<td>29</td>
</tr>
<tr>
<td>Digest words easier</td>
<td>24</td>
<td>44</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Digest pictures easier</td>
<td>31</td>
<td>31</td>
</tr>
<tr>
<td>Not fashion conscious</td>
<td>48</td>
<td>30</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fashion conscious</td>
<td>22</td>
<td>22</td>
</tr>
<tr>
<td>Community focused</td>
<td>16</td>
<td>34</td>
</tr>
<tr>
<td>Neutral</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Not community focused</td>
<td>50</td>
<td>50</td>
</tr>
</tbody>
</table>

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**

- **Pays a good salary**: 54%
- **Plenty of job options within my chosen career field**: 45%
- **Offers a strong career pathway**: 42%
- **Have a more influential role**: 30%
- **Chance to change career/enter new career field**: 29%
- **Doing work that has a positive impact for the community**: 26%
- **None of these**: 9%

**Rating of Salary Comparability to Rest of NZ**

- Really poorly (0-4): 8%
- Neutral (5-7): 77%
- Really well (8-10): 15%

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): 16%
- Neutral (5-7): 54%
- Really well (8-10): 30%

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

<table>
<thead>
<tr>
<th>Category</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>House prices</td>
<td>59%</td>
</tr>
<tr>
<td>Cost of day-to-day essentials</td>
<td>49%</td>
</tr>
<tr>
<td>Rental costs</td>
<td>46%</td>
</tr>
<tr>
<td>Cost of transport</td>
<td>36%</td>
</tr>
<tr>
<td>Cost of entertainment</td>
<td>22%</td>
</tr>
<tr>
<td>None of these</td>
<td>13%</td>
</tr>
</tbody>
</table>

Rating of Home Ownership Opportunity for First Home Buyers in Christchurch

- Really poorly (0-4): 18%
- Neutral (5-7): 57%
- Really great (8-10): 25%

Rating of Opportunity to Have a Higher Disposable Income in Christchurch

- Really poorly (0-4): 11%
- Neutral (5-7): 65%
- Really great (8-10): 23%

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

<table>
<thead>
<tr>
<th>Description</th>
<th>39% &lt; 30 years</th>
<th>52% for 30-39 years</th>
</tr>
</thead>
<tbody>
<tr>
<td>More free time for leisure activities</td>
<td></td>
<td>45%</td>
</tr>
<tr>
<td>Quicker to get around the city</td>
<td></td>
<td>38%</td>
</tr>
<tr>
<td>Quicker commute to/from work</td>
<td></td>
<td>37%</td>
</tr>
<tr>
<td>Close to the places I like to visit</td>
<td></td>
<td>35%</td>
</tr>
<tr>
<td>Work less hours</td>
<td></td>
<td>30%</td>
</tr>
<tr>
<td>Sense of community</td>
<td></td>
<td>29%</td>
</tr>
<tr>
<td>None of these</td>
<td></td>
<td>14%</td>
</tr>
</tbody>
</table>

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.

Barriers to Migrating to Christchurch (Non-Residents of Christchurch)

- Worried about earthquakes: Open to (39%) - Not interested (56%)
- Cost of living too high: Open to (17%) - Not interested (37%)
- Too far away from family/friends: Open to (31%) - Not interested (54%)
- Lack of suitable employment options: Open to (18%) - Not interested (24%)
- Quality of housing: Open to (13%) - Not interested (20%)
- Don't know many/any people there: Open to (19%) - Not interested (41%)
- Other destinations are more attractive: Open to (19%) - Not interested (27%)
- Winter weather too cold: Open to (17%) - Not interested (31%)
- Worried about crime: Open to (17%) - Not interested (31%)
- City lacks a buzz/sense of energy: Open to (15%) - Not interested (15%)
- Rebuild work is a hassle: Open to (15%) - Not interested (24%)
- Concerned about lack of things to do there: Open to (12%) - Not interested (16%)
- Other: Open to (5%) - Not interested (13%)
Driving Recommendation amongst Christchurch Residents
Willingness to recommend Christchurch is mediocre with as many detractors as advocates at present.

<table>
<thead>
<tr>
<th>Willingness to Recommend Christchurch as Place to Visit (Net Promoter Score)</th>
<th>NPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Residents (18-39) (n=290)</td>
<td>+4</td>
</tr>
<tr>
<td>&lt; 30 years old (n=141)</td>
<td>+6</td>
</tr>
<tr>
<td>30-39 years old (n=123)</td>
<td>+4</td>
</tr>
<tr>
<td>Males (n=139)</td>
<td>+11</td>
</tr>
<tr>
<td>Females (n=148)</td>
<td>-1</td>
</tr>
<tr>
<td>&lt; 6 years Resident (n=81)</td>
<td>+4</td>
</tr>
<tr>
<td>6+ years Resident (n=207)</td>
<td>+5</td>
</tr>
</tbody>
</table>

Detractor (0-6) | Passive (7-8) | Advocate (9-10)
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

- Don't offer anything unique/different to elsewhere: 358
- Community/Family events: 152
- City escape/entertainment: 71
- Empty spaces embarrassing: 54
- Not as good as it used to be: 46
- Relaxing Nature/Outdoors: 13

Based on statistical modelling of Christchurch residents (n=290)
Chart depicts attributes with most impact using an index.
In terms of current activity residents are more willing to promote lifestyle and community/family events

<table>
<thead>
<tr>
<th>Drivers Influencing Nature of Christchurch Residents Recommendation to Visit Christchurch</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lifestyle activities</td>
</tr>
<tr>
<td>Community/Family events</td>
</tr>
<tr>
<td>Adventurous Nature/Outdoors</td>
</tr>
<tr>
<td>City escape/entertainment</td>
</tr>
<tr>
<td>Displayed Art</td>
</tr>
<tr>
<td>Sport/Leisure events</td>
</tr>
<tr>
<td>Music events</td>
</tr>
<tr>
<td>Cultural events</td>
</tr>
<tr>
<td>Base to explore region</td>
</tr>
<tr>
<td>Performing Art</td>
</tr>
<tr>
<td>Relaxing Nature/Outdoors</td>
</tr>
</tbody>
</table>

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)

- Detractor (0-6): 33%
- Passive (7-8): 34%
- Advocate (9-10): 33%

NPS: 0

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)

- Plenty of job options within my chosen field: 34%
- Chance to change career/enter new career field: 31%
- Doing work that has positive impact for community: 29%
- Pays good salary: 20%
- Offers strong career pathway: 17%
- Have a more influential role: 16%
- None of these: 29%

n=290
Residents aren’t entirely sure what better cost of living for migrants could involve but tend to share similar views as potential migrants.

**Cost of Living Reasons for People to Move to Christchurch**

(Agreement amongst Christchurch Residents)

- House prices: 36%
- Cost of day-to-day essentials: 32%
- Rental costs: 31%
- Cost of transport: 24%
- Cost of entertainment: 17%
- None of these: 31%

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)

- Quicker commute to/from work: 46%
- Quicker to get around the city: 44%
- Close to the places I like to visit: 41%
- More free time for leisure activities: 30%
- Sense of community: 29%
- Work less hours: 12%
- None of these: 14%

n=290