

A person wearing a hat and a light-colored sweater is walking across a suspension bridge in a forest. The image is overlaid with a dark blue semi-transparent filter.

VISITOR INSIGHTS PROGRAMME

# MARKET PERCEPTIONS: CENTRAL OTAGO

YEAR ENDING DECEMBER 2023

## BACKGROUND & RESEARCH APPROACH

### Background

Angus & Associates is an independent marketing, research and strategic planning consultancy specialising in tourism and leisure. The Market Perceptions programme, a component of our Visitor Insights Programme (VIP), is designed to monitor perceptions of regional travel destinations within New Zealand to meet the needs of organisations across the industry, including Regional Tourism Organisations/Economic Development Agencies. The Market Perceptions programme offers subscribers a cost-effective approach to profiling current and potential visitors to their region and to monitoring and benchmarking brand perceptions, through a syndicated survey of the domestic and Australian travel markets.

### Research Approach

The Market Perceptions programme is conducted online, including on mobile devices. A total sample of at least n=7,200 New Zealand and Australian travellers are included in the programme each year (a monthly sample of n=300 New Zealanders and n=300 Australians), recruited via Dynata's consumer panel. Respondents must be aged 18+ years and must have travelled overnight within the past 12 months to participate in the research. Quotas based on New Zealand and Australian census data (region of residence, gender and age) have been set to ensure a representative and consistent sample to accurately monitor changes over time. This report is based on data collected between January - December 2023.

The 'regional benchmark' referenced in this report is the average across five destinations – Auckland, Rotorua, Central Otago, Queenstown and Marlborough.

For more information about this research please contact:

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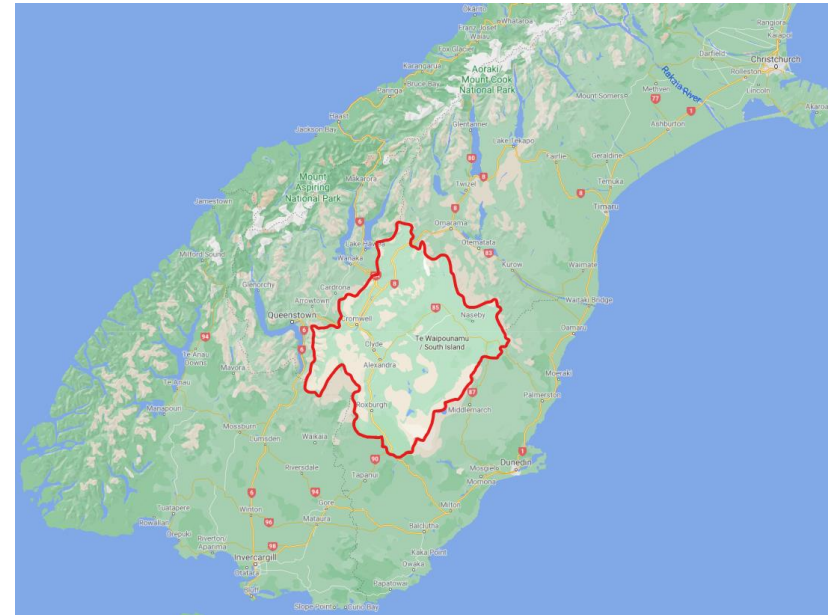
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(04) 499 2212  
marketperceptions@angusassociates.co.nz

## CENTRAL OTAGO

Tourism Central Otago is aware that there is some confusion in the market about the geographical boundaries of Central Otago. In prior research, it has been clear that when domestic and Australian travellers think of Central Otago the first places that have tended to come to mind have been Queenstown and Wanaka.

To assess how the market's understanding of the region is changing over time, while also getting an accurate 'read' on market perceptions of 'the real Central Otago', Angus & Associates' Market Perceptions research begins with a question that asks respondents what places come to mind when they think of Central Otago.

The correct context is then set by displaying a map of the region and explaining that, when we talk about Central Otago in the survey, we're referring to the region highlighted and not to Queenstown, Wanaka or Arrowtown, which are all part of the Queenstown Lakes District. This means that respondents have the correct understanding of Central Otago when answering the survey questions that follow.



A woman wearing a light-colored, wide-brimmed hat and a light-colored, textured sweater is seen from behind, walking across a wooden suspension bridge. The bridge has thick wooden planks and ropes. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent blue filter. On the left side, there is a large white circle containing the word "SNAPSHOT" in a bold, sans-serif font.

**SNAPSHOT**

SNAPSHOT (YE DECEMBER 2023)

# NEW ZEALAND TRAVELLERS

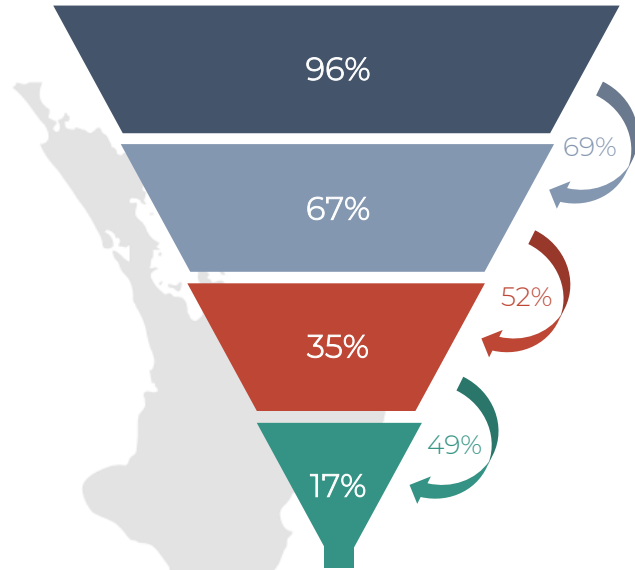
3 out of 4 New Zealanders travelled domestically within the past 12 months



9% of New Zealanders (excluding Central Otago residents) who travelled domestically in the past 12 months visited Central Otago

New Zealand travellers associate Central Otago with...

- 50% Walking & Hiking
- 39% Scenic Sightseeing
- 39% Wineries, breweries or distilleries
- 39% Nature, Wildlife & Eco-tourism



## AWARENESS

Heard of Central Otago

## KNOWLEDGE

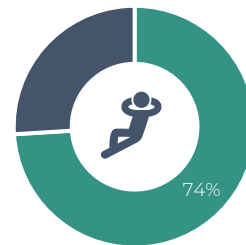
Have visited Central Otago or have some ideas about what to do there

## APPEAL

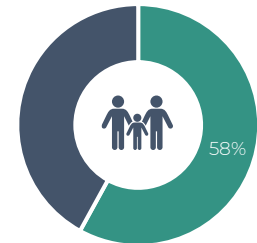
Consider Central Otago to be 'highly appealing'

## PROPENSITY TO VISIT

Will probably/ definitely visit Central Otago in next 12 months



74% of New Zealand travellers agree a holiday in Central Otago is an opportunity to slow down and relax



58% of New Zealand travellers agree Central Otago is an ideal place to reconnect with friends and family

SNAPSHOT (YE DECEMBER 2023)

# AUSTRALIAN TRAVELLERS



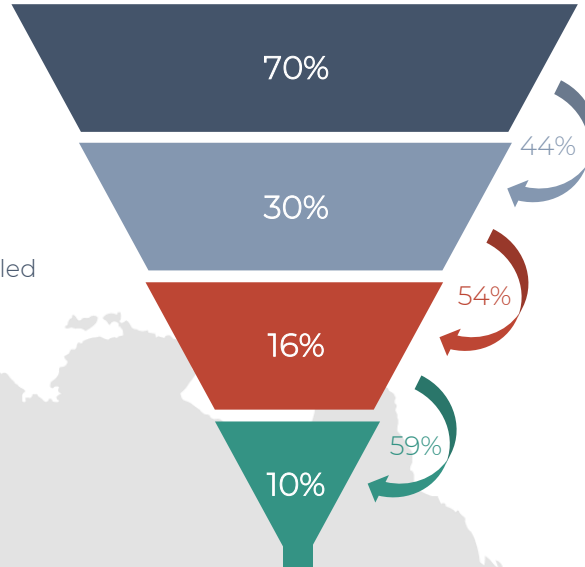
11% of Australian travellers have travelled to New Zealand in the past 12 months



6% of Australians who travelled to New Zealand in the past 12 months visited Central Otago

Australian travellers associate Central Otago with...

-  37% Walking & Hiking
-  33% Nature, Wildlife & Eco-Tourism
-  27% Scenic Sightseeing
-  27% History & Heritage

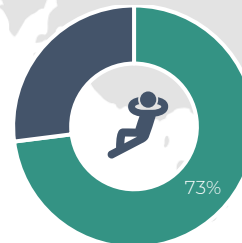


**AWARENESS**  
Heard of Central Otago

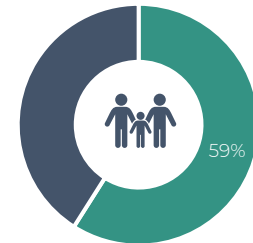
**KNOWLEDGE**  
Have visited Central Otago or have some ideas about what to do there

**APPEAL**  
Consider Central Otago to be 'highly appealing'

**PROPENSITY TO VISIT**  
Will probably/ definitely visit Central Otago in next 12 months



73% of Australian travellers agree a holiday in Central Otago is an opportunity to slow down and relax



59% of Australian travellers agree Central Otago is an ideal place to reconnect with friends and family

A woman wearing a wide-brimmed hat and a light-colored top is seen from behind, standing on a suspension bridge. The background is a dense forest of tall, thin trees. The entire image is overlaid with a dark blue tint. A large white circle is positioned on the left side of the image, containing the text.

**NEW ZEALAND  
TRAVELLERS**

## CENTRAL OTAGO UPDATE: YEAR ENDING DECEMBER 2023

Three in four New Zealanders travelled domestically in the past 12 months and 9% of these domestic travellers visited Central Otago. Visitors were more likely to be from neighbouring regions (Canterbury and Otago) but Auckland has moved into third place with 18% of visitors, up from 13% a year earlier. Visitors tend to be older (60+) and travelling as couples.

More than half of all New Zealand travellers have visited Central Otago in the past. Of those who haven't, 16% have some ideas about what to do there. However, 30% indicate that they don't know much about what there is to do in Central Otago, indicating opportunities remain to educate the domestic market.

When New Zealand travellers think of Central Otago, the beautiful scenery, warm weather, wine and fruit are top-of-mind. Walking or hiking; scenic sight-seeing; and wineries, breweries, and distilleries remain the top three activities/experiences associated with Central Otago. Walking and hiking has firmed as the top motivator for both domestic and Australian travellers, compared to 2022.

Three in four New Zealand travellers agree that 'a holiday in Central Otago is an opportunity to slow down and relax'. While this is on par with last year, there has been a strengthening in perceptions of Central Otago being 'an ideal place to reconnect with friends and family' (58% vs 52% in YE December 2022).

Central Otago remains a highly appealing destination for the domestic market, especially for those who have visited the region recently. Net Promoter Score (NPS) is used to measure visitors' propensity to recommend travel destinations. The domestic visitor NPS for Central Otago is +13, indicating that there are more advocates for the region than there are detractors (versus a regional benchmark of +1). NPS is considerably higher amongst more recent visitors (+44).

One in ten New Zealand travellers intending to travel domestically in the next 12 months indicate that they 'definitely will' visit Central Otago. The most common barriers to visiting are having no specific reasons to visit, no connections there, and the inconvenience of getting to the region. Perceived difficulties in travelling to Central Otago are significantly higher than for other regions, as is a lack of knowledge about the region (i.e. not knowing enough about what there is to do there).

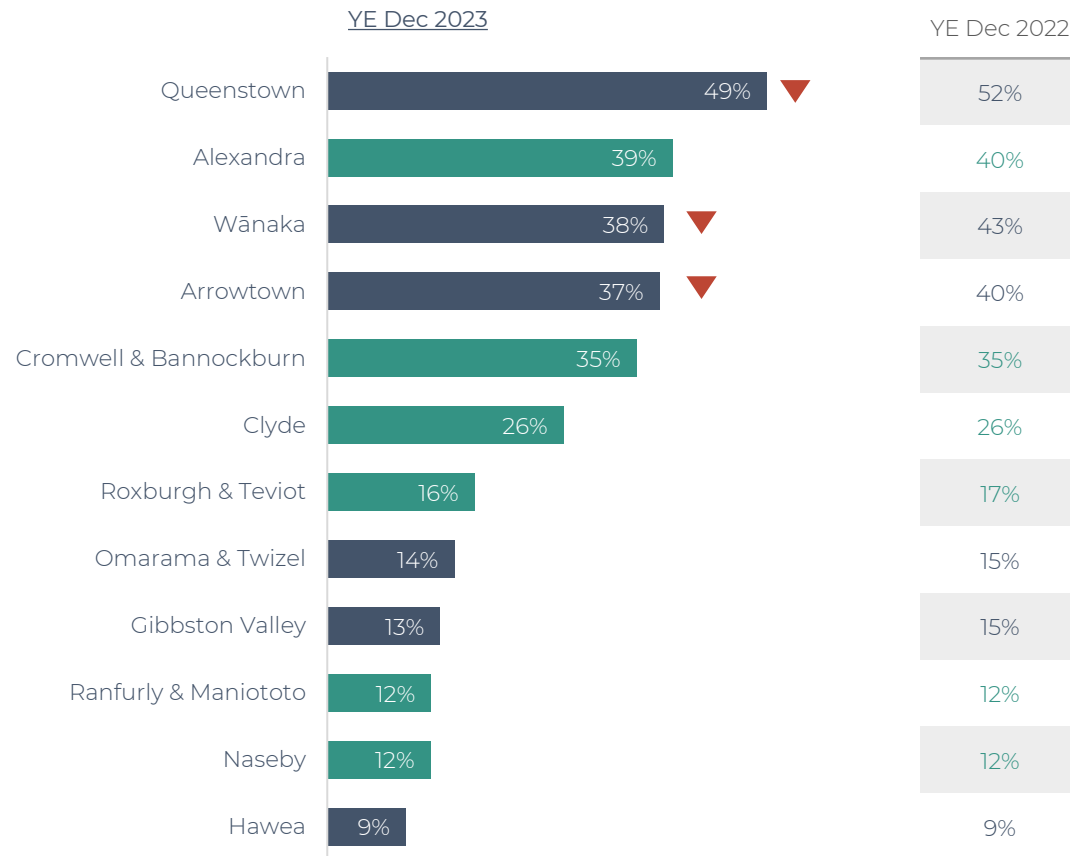




# CENTRAL OTAGO TOP-OF-MIND PLACES



When you see 'Central Otago', which of the following places do you think of?

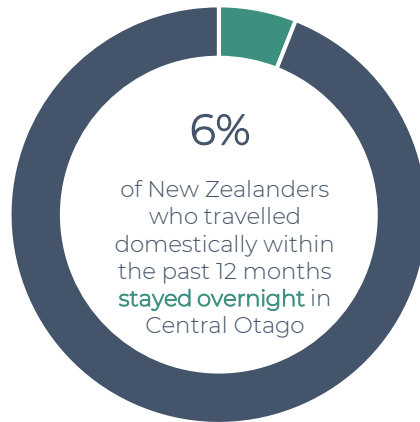


# MARKET PENETRATION & FAMILIARITY



In the past 12 months, where (if anywhere) have you travelled?  
How familiar are you with Central Otago as a destination to visit for a short break or holiday?

**75%** of New Zealanders travelled domestically around New Zealand in the past 12 months



Familiarity	YE Dec 2023	Regional Benchmark
I have visited Central Otago	51%	69%
I have never visited, but do have some ideas about what you can do there	16%	14%
I have never visited, and don't know much about what you can do there	30%	15%
I have never heard of Central Otago	4%	2%
Base: Total Sample (excluding Central Otago residents)		n= 3,753

	YE Dec 2022	YE Dec 2023
Visited Central Otago	10%	9%
Stayed Overnight in Central Otago	6%	6%
Base: Travelled around NZ in Past 12 Months (excluding Central Otago residents)	n= 3,626	n= 3,419

# VISITOR PROFILE



Region of Residence	Total Sample (excl. residents)	Visited Central Otago (past 12 months)
Northland	4%	2% ▼
Auckland	33%	18% ▼
Waikato	10%	3% ▼
Bay of Plenty	7%	4% ▼
Tairāwhiti / Gisborne	1%	0% ▼
Hawke's Bay	4%	1% ▼
Taranaki	3%	1% ▼
Manawatū-Whanganui	5%	2% ▼
Wellington (& Wairarapa)	11%	6% ▼
Tasman	1%	1%
Nelson	1%	1%
Marlborough	1%	1%
West Coast	1%	1%
Canterbury	13%	24% ▲
Otago	5%	26% ▲
Southland	2%	10% ▲
Base:	n= 3,753	n= 302

Age	Total Sample (excl. residents)	Visited Central Otago (past 12 months)
18-19 years	4%	4%
20-29 years	17%	12% ▼
30-39 years	17%	18%
40-49 years	17%	13% ▼
50-59 years	17%	16%
60-69 years	13%	19% ▲
70+ years	14%	18%
Household Composition		
My husband, wife or partner	60%	69% ▲
My mother and/or father	7%	5%
My children aged under 5	12%	10%
My children aged 5 to 14	18%	16%
My children aged 15 or older	13%	9% ▼
Other family/relatives	10%	6% ▼
Other person(s)	8%	7%
None of the above – I live alone	15%	14%
Base:	n= 3,753	n= 302

# CENTRAL OTAGO POSITIONING



What is the first thing that comes to mind when you think about Central Otago?



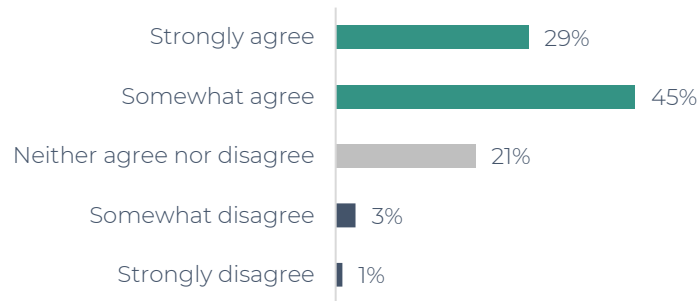
Note: Word cloud was created based on data from Q4 2023

# CENTRAL OTAGO POSITIONING



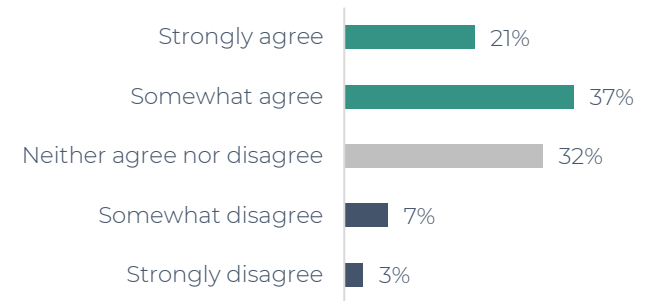
To what extent do you agree or disagree with the following statements?

A holiday in Central Otago is an opportunity to slow down and relax



Module Sample	YE Dec 2022	YE Dec 2023
Strongly agree	25%	29%
Somewhat agree	46%	45%
Neither agree nor disagree	24%	21%
Somewhat disagree	4%	3%
Strongly disagree	1%	1%
Base: Heard of Central Otago	n= 1,554	n= 2,053

Central Otago is an ideal place to reconnect with friends and family



Module Sample	YE Dec 2022	YE Dec 2023
Strongly agree	18%	21%
Somewhat agree	34%	37%
Neither agree nor disagree	36%	32%
Somewhat disagree	8%	7%
Strongly disagree	4%	3%
Base: Heard of Central Otago	n= 1,554	n= 2,053

# ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO



Which, if any, of the following activities or experiences do you associate with Central Otago?

Module Sample	YE Dec 2022	YE Dec 2023
Walking & Hiking	47%	50%
Scenic Sight-Seeing	34%	39%
Wineries, breweries or distilleries	37%	39%
Nature, Wildlife & Eco-tourism	34%	39%
Cycling/Mountain Biking	36%	38%
Restaurants, Cafés & Bars	32%	35%
History & Heritage	34%	34%
Family Activities	29%	32%
Fishing or Hunting	28%	29%
Gardens, Parks & Reserves	24%	26%
Adrenaline Activities	22%	24%
Skiing/Snowboarding	21%	23%
Water-based Activities	16%	17%
Golf	14%	15%
Shopping	12%	15%
Events, Concerts & Festivals	13%	13%
Arts & Culture	10%	12%
Spa & Wellness	10%	11%
Māori/Pacific Culture	5%	6%
Casinos/Gambling	4%	4%
Volcanic & Geothermal	3%	4%
Don't know/None of above	17%	2%
Base: Heard of Central Otago	n= 1,554	n= 2,053

Recent Visitors	YE Dec 2022	YE Dec 2023
Walking & Hiking	70%	72%
Wineries, breweries or distilleries	70%	68%
Cycling/Mountain Biking	66%	61%
Scenic Sight-Seeing	52%	56%
Restaurants, Cafés & Bars	52%	54%
History & Heritage	51%	53%
Nature, Wildlife & Eco-tourism	39%	52%
Family Activities	55%	50%
Fishing or Hunting	57%	47%
Adrenaline Activities	47%	46%
Water-based Activities	38%	35%
Skiing/Snowboarding	38%	34%
Golf	25%	32%
Gardens, Parks & Reserves	31%	31%
Events, Concerts & Festivals	26%	27%
Arts & Culture	14%	18%
Shopping	17%	16%
Spa & Wellness	20%	14%
Māori/Pacific Culture	4%	5%
Casinos/Gambling	5%	4%
Volcanic & Geothermal	3%	2%
Don't know/ None of above	2%	0%
Base: Central Otago Visitors (P12M)	n= 137	n= 169

NEW ZEALAND TRAVELLERS  
**CENTRAL OTAGO APPEAL**



How appealing is Central Otago to you as a destination for a short break or holiday?

Total Sample	YE Dec 2022	YE Dec 2023	Regional Benchmark
Highly Appealing	41%	42%	44%
Somewhat Appealing	38%	40%	36%
Not very Appealing	12%	11%	12%
Not at all Appealing	3%	3%	5%
Don't know/NA	6%	5%	3%
Base: Heard of Central Otago (excl. residents)	n= 3,625	n= 3,611	

Recent Visitors	YE Dec 2022	YE Dec 2023	Regional Benchmark
Highly Appealing	78%	77%	59%
Somewhat Appealing	20%	20%	30%
Not very Appealing	1%	2%	8%
Not at all Appealing	0%	0%	2%
Don't know/NA	0%	0%	0%
Base: Visited Central Otago in Past 12 Months	n= 348	n= 302	

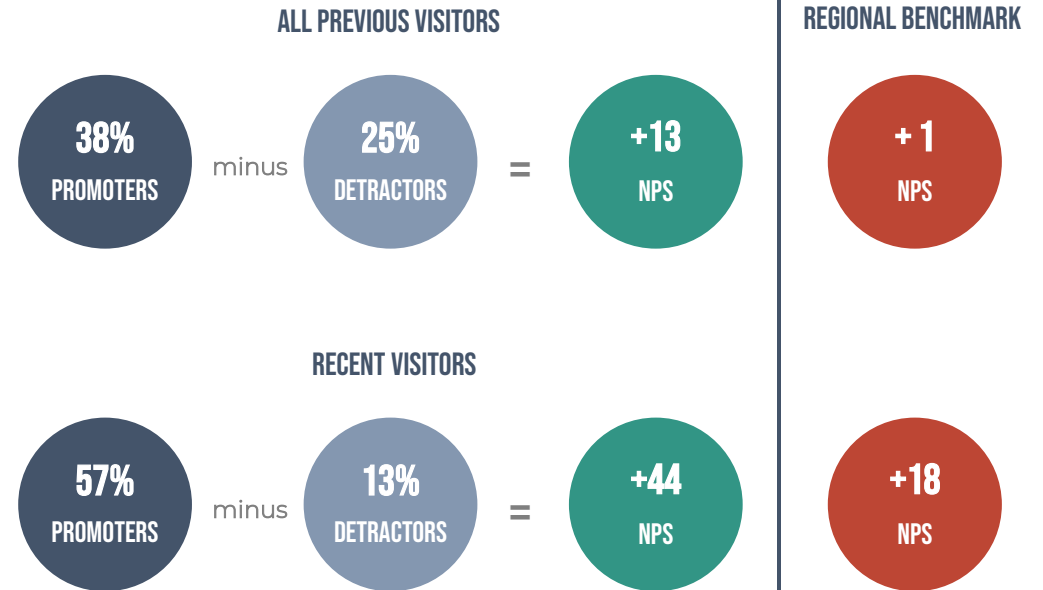
# NET PROMOTER SCORE (NPS)



On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend Central Otago as a travel destination to a friend, family member, or colleague?

The Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer to recommend your product or service. Any positive score means that you have more loyal advocates willing to recommend your product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

		Visited Central Otago Previously	Visited Central Otago Recently (P12M)
Promoters	10 (Extremely likely)	22%	37%
	9	16%	20%
Passive	8	21%	19%
	7	16%	11%
Detractors	6	9%	5%
	5	7%	3%
	4	3%	2%
	3	2%	1%
	2	1%	0%
	1	0%	0%
	0 (Not at all likely)	3%	2%
Base:		n= 1,902	n= 294





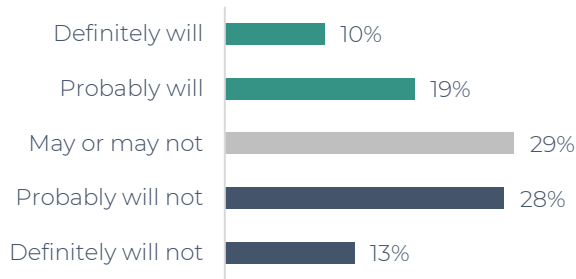
# PROPENSITY TO VISIT CENTRAL OTAGO



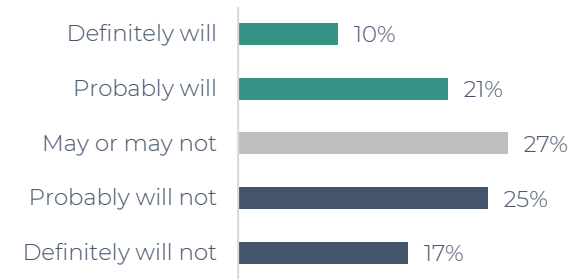
How likely are you to visit Central Otago within the next 12 months? (for any reason / for leisure purposes)

**84%** of NZ travellers intend to travel domestically in the next 12 months (i.e. definitely / probably will travel around NZ)

## PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (ANY REASON)



## PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (LEISURE)



## PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (ANY REASON)

	YE Dec 2022	YE Dec 2023
Definitely will	11%	10%
Probably will	17%	19%
May or may not	27%	29%
Probably will not	31%	28%
Definitely will not	14%	13%
Base: Heard of Central Otago and intend to travel domestically in next 12 months (excl. residents)	n=3,541	n=3,517

# FUTURE VISITOR PROFILE



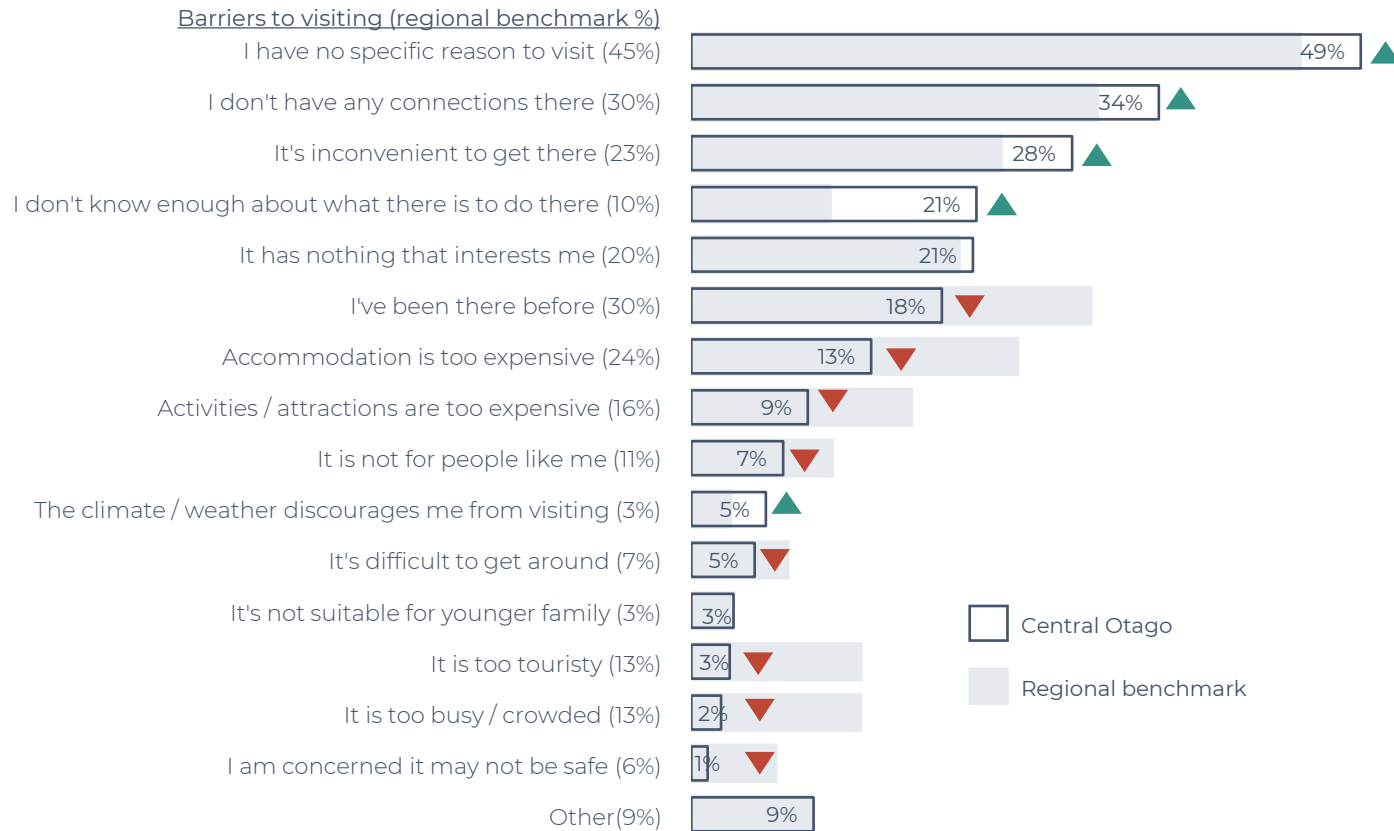
Region of Residence	Total Sample (excl. residents)	'Definitely' will visit Central Otago (next 12 months)	
Northland	4%	2%	▼
Auckland	33%	28%	▼
Waikato	10%	6%	▼
Bay of Plenty	7%	4%	▼
Tairāwhiti / Gisborne	1%	0%	▼
Hawke's Bay	4%	1%	▼
Taranaki	3%	2%	
Manawatū-Whanganui	5%	3%	▼
Wellington (& Wairarapa)	11%	5%	▼
Tasman	1%	1%	
Nelson	1%	1%	
Marlborough	1%	1%	
West Coast	1%	1%	
Canterbury	13%	17%	
Otago	5%	20%	▲
Southland	2%	8%	▲
Base:	n= 3,753	n= 360	

Age	Total Sample (excl. residents)	'Definitely' will visit Central Otago (next 12 months)	
18-19 years	4%	4%	
20-29 years	17%	14%	
30-39 years	17%	23%	▲
40-49 years	17%	16%	
50-59 years	17%	17%	
60-69 years	13%	13%	
70+ years	14%	13%	
Household Composition			
My husband, wife or partner	60%	63%	
My mother and/or father	7%	10%	
My children aged under 5	12%	12%	
My children aged 5 to 14	18%	18%	
My children aged 15 or older	13%	9%	▼
Other family/relatives	10%	9%	
Other person(s)	8%	4%	▼
None of the above – I live alone	15%	11%	▼
Base:	n= 3,753	n= 360	

# BARRIERS TO VISITING CENTRAL OTAGO



You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?

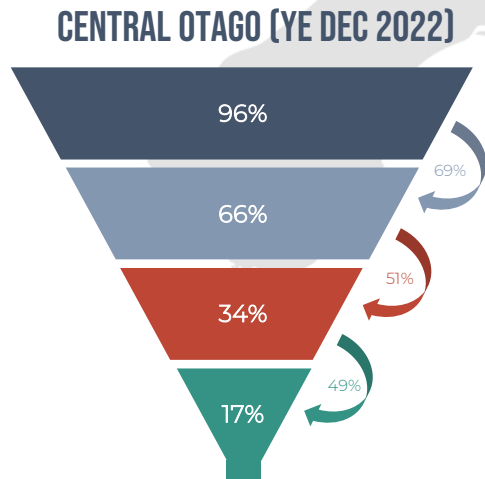
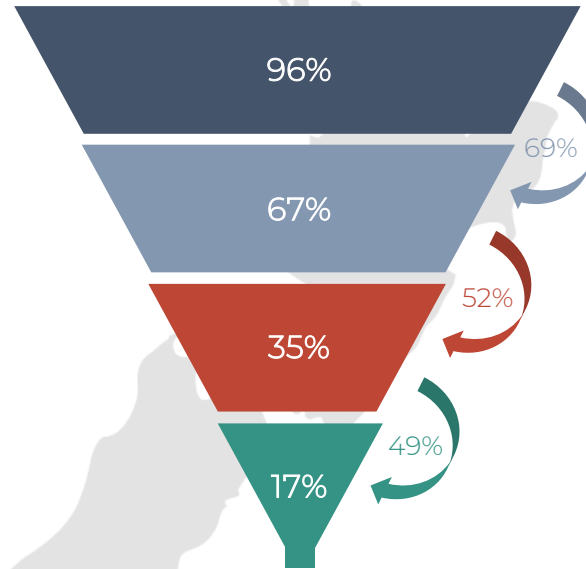
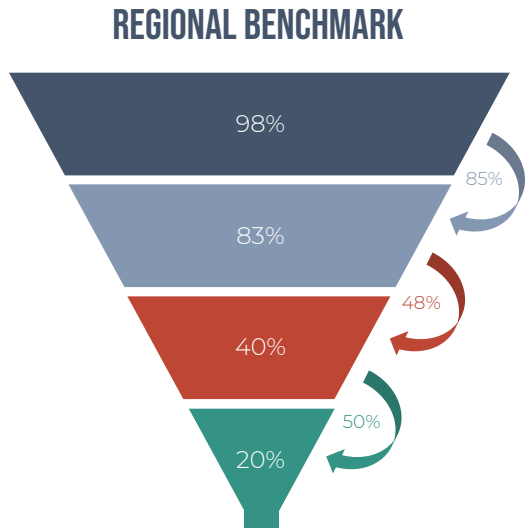


▲ / ▼ Significantly higher or lower than Regional Benchmark at 95% confidence

Base: Intend to travel domestically in next 12 months and have heard of Central Otago, but are unlikely to visit (n= 1,095) 19

# CONVERTING AWARENESS TO VISITATION

## CENTRAL OTAGO (YE DEC 2023)



- AWARENESS**  
Heard of Central Otago
- KNOWLEDGE**  
Have visited Central Otago or have some ideas about what to do there
- APPEAL**  
Consider Central Otago to be 'highly appealing'
- PROPENSITY TO VISIT**  
Will probably/ definitely visit Central Otago in next 12 months

A woman wearing a light-colored hat and a light-colored top is seen from behind, walking across a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a dark blue tint. A large white circle is positioned on the left side of the image, containing the text 'AUSTRALIAN TRAVELLERS'.

**AUSTRALIAN  
TRAVELLERS**

## AUSTRALIAN TRAVELLERS

# CENTRAL OTAGO UPDATE: YEAR ENDING DECEMBER 2023

The appeal of Central Otago as a travel destination has remained stable among Australian travellers over the past year (83% rate the region as appealing versus 82% in YE December 2022).

One in ten Australian travellers have visited Central Otago in the past. Of those who haven't, a significant proportion don't know much about what there is to do in the region, indicating plenty of opportunity to educate. One in three Australian travellers have never heard of Central Otago.

'Mountains', 'beautiful scenery' and 'wine' are among the most common top-of-mind associations when Australian travellers (who are aware of the region) think of Central Otago. The top four activities/experiences associated with Central Otago are walking or hiking; nature, wildlife or eco-tourism; scenic sightseeing; and history or heritage. This is in line with last year's results, with walking or hiking becoming the clear top association.

While Central Otago being an ideal place to reconnect with friends and family has remained stable, there has been a strengthening in perceptions among Australian travellers, of a holiday in Central Otago being an opportunity to slow down and relax (73% agreement versus 70% in YE December 2022).

Net Promoter Score (NPS) is used to measure visitors' propensity to recommend travel destinations. The Australian visitor NPS for Central Otago is +23 indicating that there are more advocates for the region than there are detractors (slightly lower than the regional benchmark of +26).

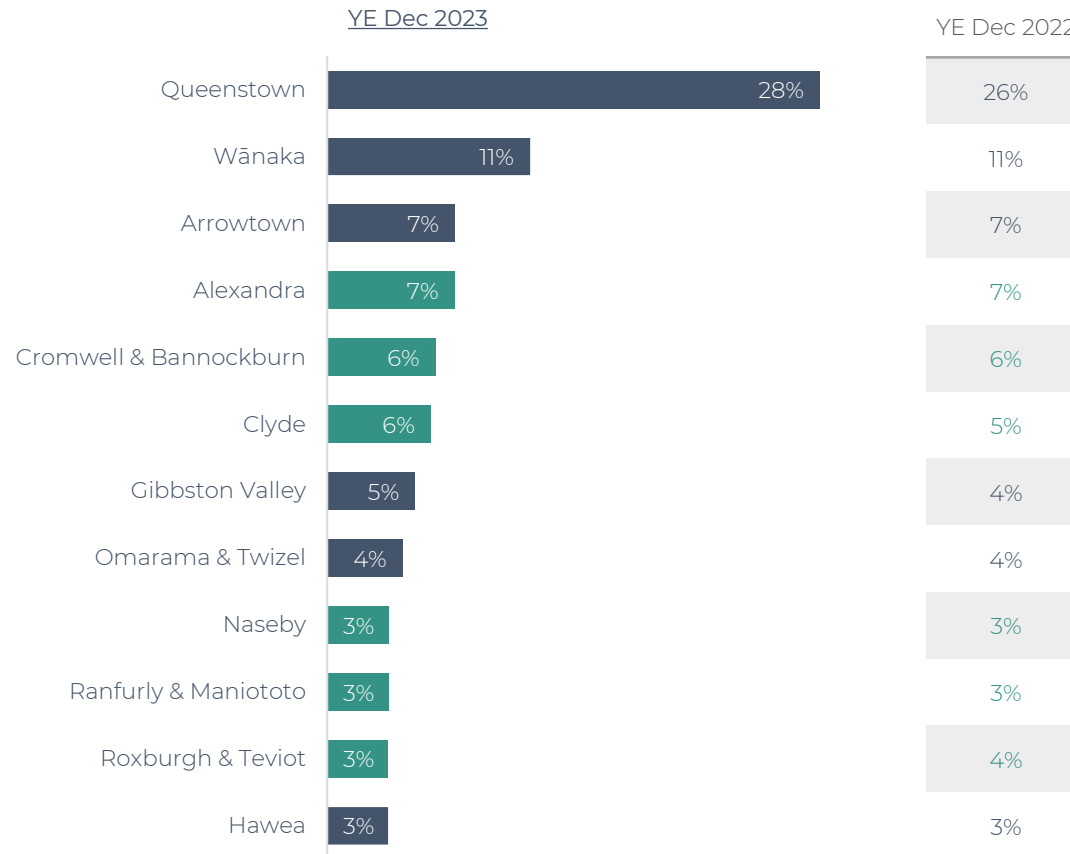
One in three Australian travellers intend to travel to New Zealand in the next 12 months. Of these, 13% indicate that they 'definitely will' visit Central Otago. This future Australian visitor profile skews towards younger families in the 20–49-year age bracket. More than two-thirds (69%) of these intending visitors come from New South Wales and Victoria. The most common barriers deterring Australian travellers from visiting Central Otago include the lack of a specific reason to visit, lack of knowledge about what there is to do there and having no connections with the region.



# CENTRAL OTAGO TOP-OF-MIND PLACES



When you see 'Central Otago', which of the following places do you think of?

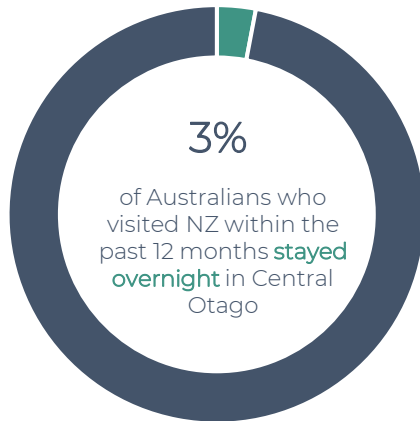


# MARKET PENETRATION & FAMILIARITY



In the past 12 months, where (if anywhere) have you travelled?  
How familiar are you with Central Otago as a destination to visit for a short break or holiday?

11% of Australians surveyed visited New Zealand in the past 12 months



Familiarity	YE Dec 2023	Regional Benchmark
I have visited Central Otago	14%	28%
I have never visited, but do have some ideas about what you can do there	16%	22%
I have never visited, and don't know much about what you can do there	39%	33%
I have never heard of Central Otago	30%	18%
Base: Total Sample	n= 3,697	

	YE Dec 2022	YE Dec 2023
Visited Central Otago	6%	6%
Stayed Overnight in Central Otago	1%	3%
Base: Travelled to NZ in Past 12 Months	n= 290	n= 551



# VISITOR PROFILE



	Total Sample	Visited Central Otago (past 12 months)
<b>Region of Residence</b>		
Australian Capital Territory	2%	3%
New South Wales	31%	38%
Northern Territory	1%	0% ▼
Queensland	20%	15%
South Australia	7%	6%
Tasmania	3%	0% ▼
Victoria	24%	26%
Western Australia	11%	12%
Base:	n= 3,697	n= 34

	Total Sample	Visited Central Otago (past 12 months)
<b>Age</b>		
18-19 years	4%	6%
20-29 years	17%	12%
30-39 years	18%	29%
40-49 years	18%	21%
50-59 years	16%	12%
60-69 years	13%	18%
70+ years	14%	3% ▼
<b>Household Composition</b>		
My husband, wife or partner	58%	68%
My mother and/or father	7%	12%
My children aged under 5	11%	24%
My children aged 5 to 14	19%	32%
My children aged 15 or older	16%	18%
Other family/relatives	8%	3%
Other person(s)	5%	3%
None of the above – I live alone	17%	9%
Base:	n= 3,697	n= 34

# CENTRAL OTAGO POSITIONING



What is the first thing that comes to mind when you think about Central Otago?



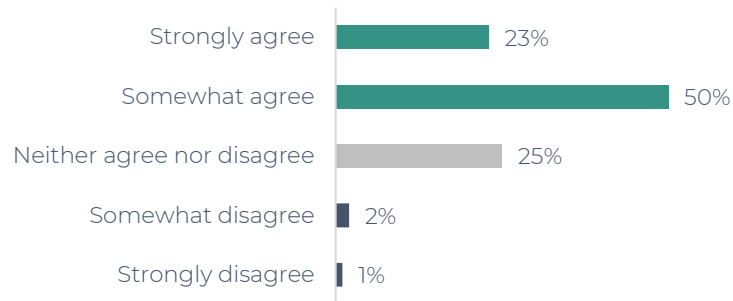
Note: Word cloud was created based on data from Q4 2023

# CENTRAL OTAGO POSITIONING

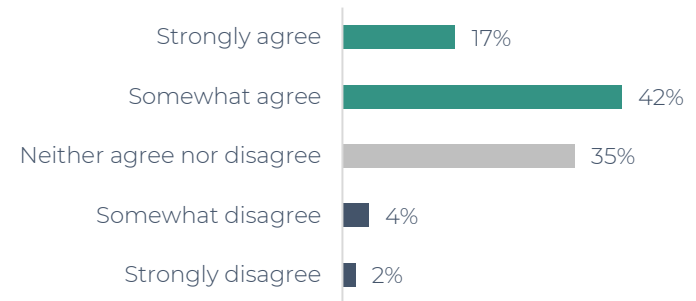


To what extent do you agree or disagree with the following statements?

A holiday in Central Otago is an opportunity to slow down and relax



Central Otago is an ideal place to reconnect with friends and family



Module Sample	YE Dec 2022	YE Dec 2023
Strongly agree	23%	23%
Somewhat agree	47%	50%
Neither agree nor disagree	27%	25%
Somewhat disagree	2%	2%
Strongly disagree	1%	0%
Base: Heard of Central Otago	n= 1,224	n= 1,821

Module Sample	YE Dec 2022	YE Dec 2023
Strongly agree	17%	17%
Somewhat agree	42%	42%
Neither agree nor disagree	34%	35%
Somewhat disagree	4%	4%
Strongly disagree	2%	2%
Base: Heard of Central Otago	n= 1,224	n= 1,821

# ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO



Which, if any, of the following activities or experiences do you associate with Central Otago?

Module Sample	YE Dec 2022	YE Dec 2023
Walking & Hiking	32%	37%
Nature, Wildlife & Eco-tourism	32%	33%
Scenic Sight-Seeing	24%	27%
History & Heritage	23%	27%
Gardens, Parks & Reserves	21%	23%
Restaurants, Cafés & Bars	19%	22%
Family Activities	21%	21%
Wineries, breweries or distilleries	21%	20%
Cycling/Mountain Biking	19%	19%
Fishing or Hunting	15%	19%
Māori/Pacific Culture	19%	18%
Shopping	15%	14%
Adrenaline Activities	12%	14%
Arts & Culture	15%	13%
Spa & Wellness	10%	12%
Volcanic & Geothermal	12%	12%
Skiing/Snowboarding	11%	12%
Water-based Activities	11%	11%
Events, Concerts & Festivals	9%	9%
Golf	8%	8%
Casinos/Gambling	5%	5%
Don't know	25%	20%
Base: Heard of Central Otago	n= 1,224	n= 1,821

# CENTRAL OTAGO APPEAL



How appealing is Central Otago to you as a destination for a short break or holiday?

Total Sample	YE Dec 2022	YE Dec 2023	Regional Benchmark
Highly Appealing	37%	38%	47%
Somewhat Appealing	45%	45%	39%
Not very Appealing	6%	6%	6%
Not at all Appealing	1%	1%	2%
Don't know/NA	10%	10%	7%
Base: Heard of Central Otago	n= 2,401	n= 2,572	

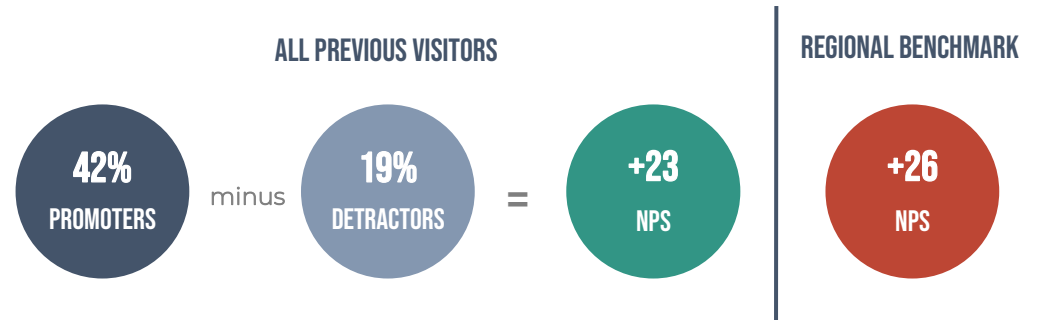
# NET PROMOTER SCORE (NPS)



On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend Central Otago as a travel destination to a friend, family member, or colleague?

The Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer to recommend your product or service. Any positive score means that you have more loyal advocates willing to recommend your product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.

		Visited Central Otago Previously
Promoters	10 (Extremely likely)	22%
	9	20%
Passive	8	24%
	7	15%
Detractors	6	8%
	5	7%
	4	1%
	3	1%
	2	0%
	1	0%
0 (Not at all likely)		2%
Base:		n= 510



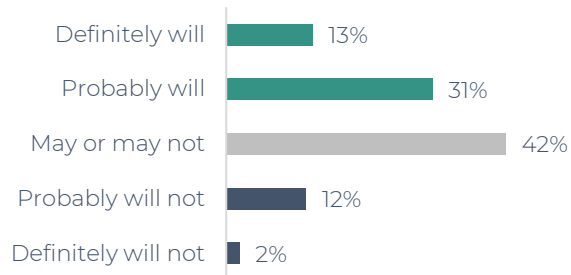
# PROPENSITY TO VISIT CENTRAL OTAGO



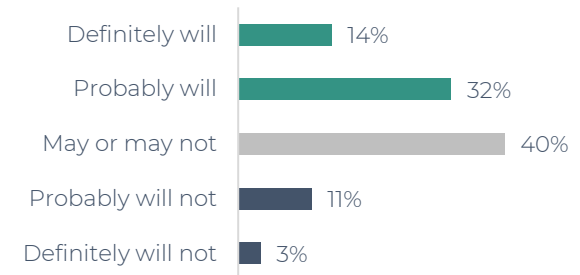
How likely are you to visit Central Otago within the next 12 months? (for any reason / for leisure purposes)

**39%** of Australian travellers intend to travel to New Zealand in the next 12 months (i.e. definitely / probably will travel)

## PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (ANY REASON)



## PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (LEISURE)



## PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (ANY REASON)

	YE Dec 2022	YE Dec 2023
Definitely will	14%	13%
Probably will	30%	31%
May or may not	43%	42%
Probably will not	10%	12%
Definitely will not	3%	2%
Base: Heard of Central Otago and intend to travel to NZ in next 12 months	n=1,794	n=1,950

# FUTURE VISITOR PROFILE



How likely are you to visit Central Otago for leisure purposes within the next 12 months?

Region of Residence	Total Sample	'Definitely' will visit Central Otago (next 12 months)
Australian Capital Territory	2%	3%
New South Wales	31%	40% ▲
Northern Territory	1%	1%
Queensland	20%	9% ▼
South Australia	7%	5%
Tasmania	3%	2%
Victoria	24%	29%
Western Australia	11%	11%
Base:	n= 3,697	n= 253

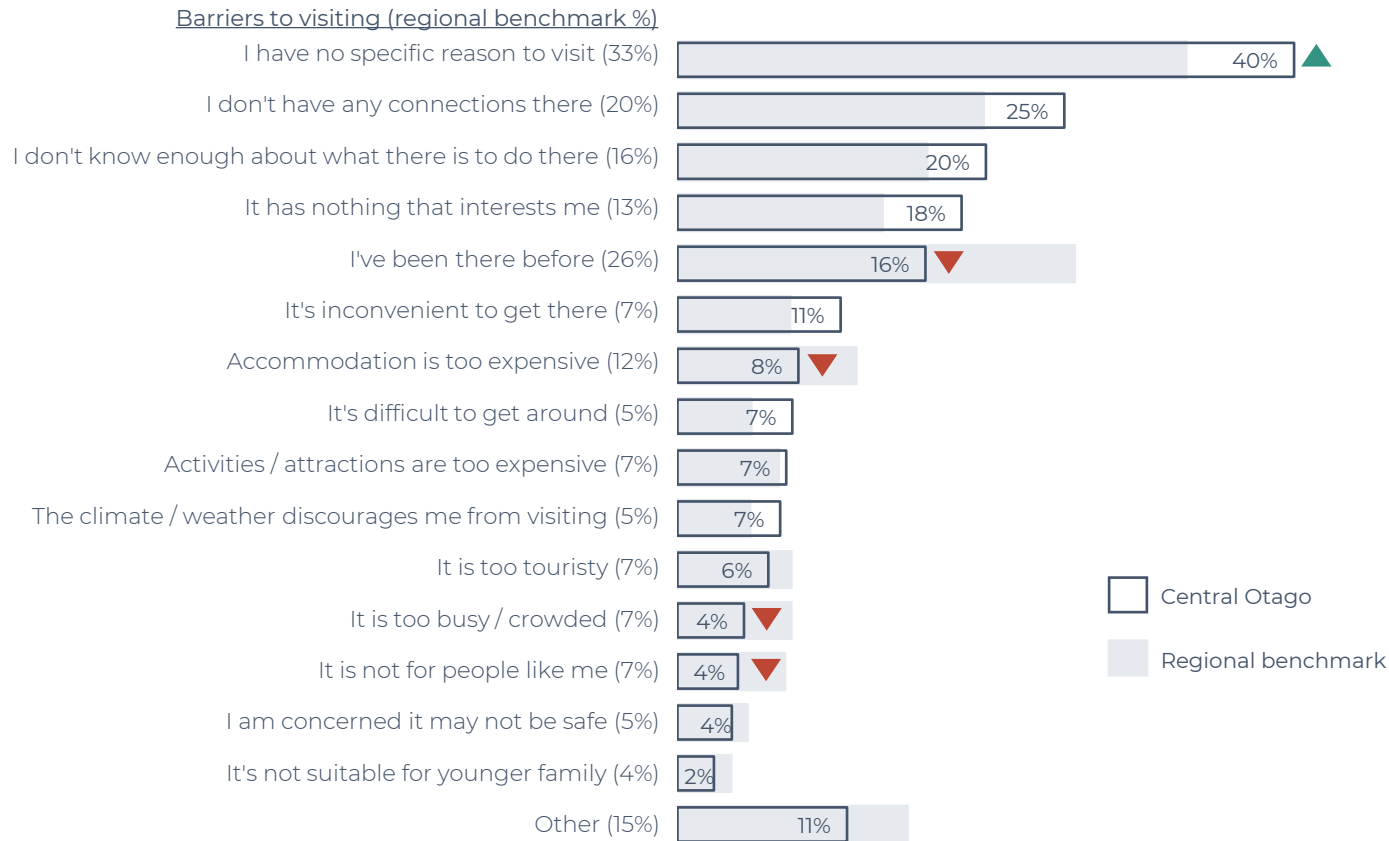
Age	Total Sample	'Definitely' will visit Central Otago (next 12 months)
18-19 years	4%	3%
20-29 years	17%	20%
30-39 years	18%	29% ▲
40-49 years	18%	21%
50-59 years	16%	11% ▼
60-69 years	13%	9% ▼
70+ years	14%	7% ▼
Household Composition		
My husband, wife or partner	58%	61%
My mother and/or father	7%	6%
My children aged under 5	11%	16% ▲
My children aged 5 to 14	19%	33% ▲
My children aged 15 or older	16%	18%
Other family/relatives	8%	6%
Other person(s)	5%	4%
None of the above – I live alone	17%	12% ▼
Base:	n= 3,697	n= 253



# BARRIERS TO VISITING CENTRAL OTAGO



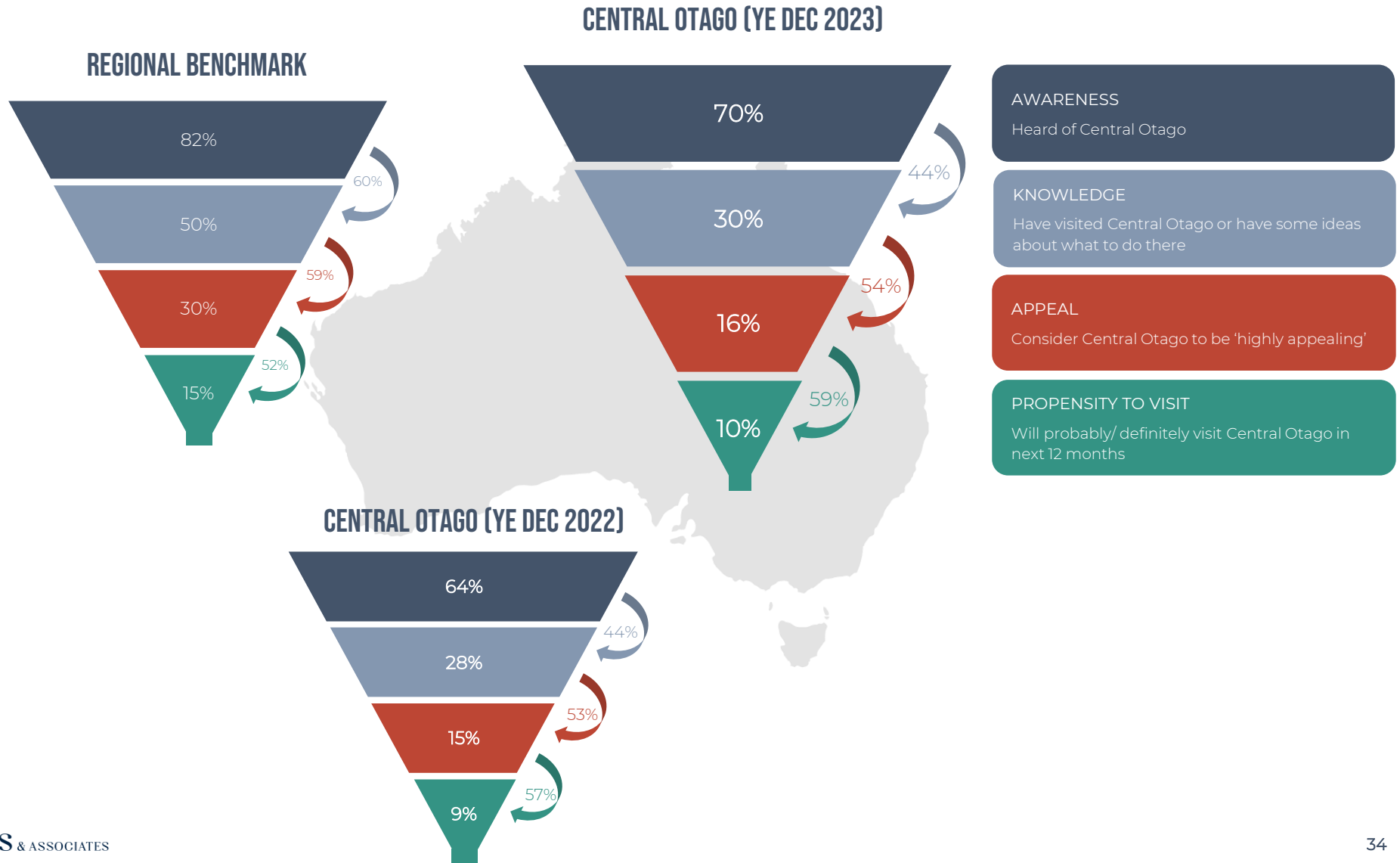
You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?



▲ / ▼ Significantly higher or lower than Regional Benchmark at 95% confidence

Base: Intend to travel to NZ in next 12 months and have heard of Central Otago but are unlikely to visit (n= 255) 33

# CONVERTING AWARENESS TO VISITATION



A woman wearing a light-colored hat and a light-colored top is seen from behind, walking across a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent dark blue filter. On the left side, there is a large white circle containing the text 'TRAVELLER PERSONAS'.

**TRAVELLER PERSONAS**

## CENTRAL OTAGO UPDATE: YEAR ENDING DEC 2023

This section focuses on the five travel personas developed for Tourism Central Otago (the personas are described on the next slide).

The relative size of each persona segment varies between the New Zealand and Australian travel markets. While the 'bond with others' persona is the most dominant segment in each market, it makes up a significantly larger proportion of New Zealand travellers than Australian (37% NZ; 27% AU). Among Australian travellers, the 'explore and discover' and 'indulge' personas are more significant in size, compared with the domestic market.

Insights into the differences in how the personas perceive Central Otago are consistent across the two geographical markets. Unless otherwise specified, New Zealand and Australian data has been combined in this section to look at Central Otago from the perspective of these five 'psychographic' market segments.

While Central Otago has broad appeal, the 'explore and discover', 'challenge and achieve' and 'indulge' personas are more likely to rate Central Otago as a highly appealing destination for a short break or holiday. Those in the 'challenge and achieve' segment are more likely to agree that a holiday in Central Otago is either an opportunity to slow down and relax, or an ideal place to reconnect with friends and family. However, this segment also has the lowest proportion of travellers who have actually visited the region. The 'escape and relax' segment is less likely to rate Central Otago as highly appealing and less likely to agree with the two positioning statements.

Net Promoter Score (NPS) is used to measure visitors' propensity to recommend travel destinations. While visitors across all segments have a high propensity to recommend Central Otago, the 'explore and discover' and 'challenge and achieve' personas are the most likely to advocate for the region (with NPS scores of +24 and +22 respectively, compared with the region's weighted average of +16 for NZ/AU visitors).

Barriers to visiting Central Otago vary to some extent by persona. Having no specific reason to visit the region is a most significant barrier for all segments and, to a lesser extent, having no connections in the region was the other significant reason except for the 'indulge' segment. Travellers in this persona are less likely to visit the region as they have been there before. The inconvenience of getting to Central Otago is somewhat more of a barrier for the 'bond with others' segment.



# PERSONA DESCRIPTIONS



## BOND WITH OTHERS

Spending quality time with family, friends or my partner is a priority for me. I like to get away with groups of friends or with my family to enjoy activities that we can all do together.



## EXPLORE & DISCOVER

I love travelling to unique destinations and discovering unfamiliar places. I enjoy coming home with new knowledge or skills to share with my family or friends.



## INDULGE

I feel fortunate that I have the means to travel when I want to. I enjoy visiting the more unique places that people talk about and experiencing things that not everyone gets to do while travelling.



## ESCAPE & RELAX

With my work and other commitments, it's difficult to find time to get away. Travel gives me a chance to escape from the routine and pressures of everyday life to relax and recharge.



## CHALLENGE & ACHIEVE

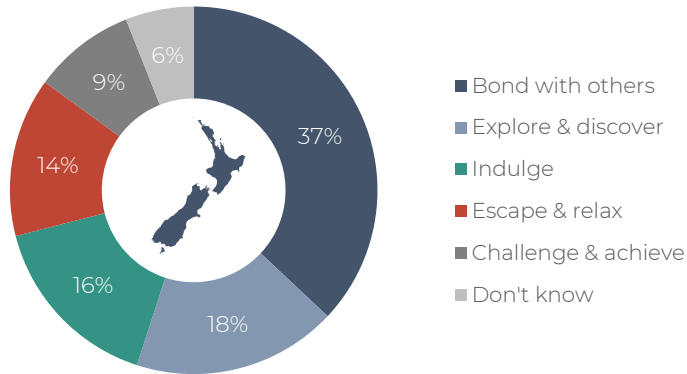
Holidays are a chance for me to get outside, get active and make the most of the natural environment. I like to challenge myself physically, pushing my personal limits.

# DOMESTIC VS. AUSTRALIAN TRAVELLERS

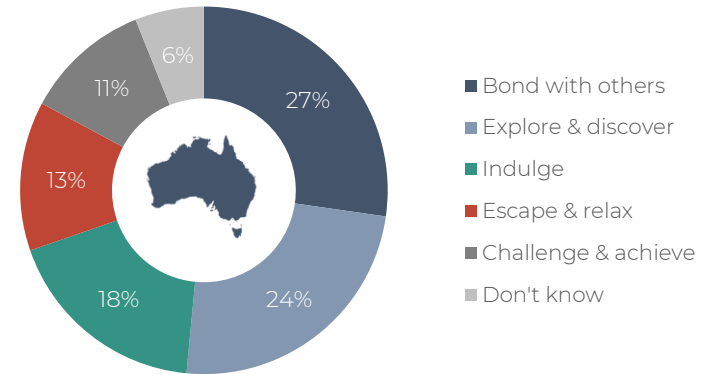


Which one of the following best describes you and your views on travel and holidays?

## NEW ZEALAND



## AUSTRALIA



	YE Dec 2022	YE Dec 2023
Bond with others	37%	37%
Explore & discover	17%	18%
Indulge	17%	16%
Escape & relax	14%	14%
Challenge & achieve	9%	9%
Don't know	7%	6%
Base: Total Sample (excl. residents)	n=3,759	n=3,753

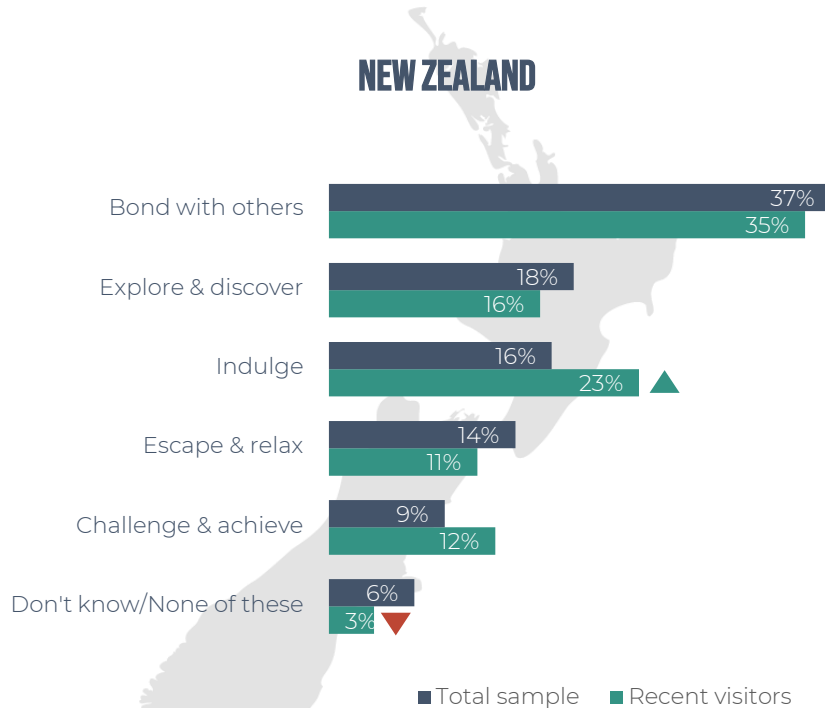
	YE Dec 2022	YE Dec 2023
Bond with others	28%	27%
Explore & discover	22%	24% ▲
Indulge	21%	18% ▼
Escape & relax	11%	13% ▲
Challenge & achieve	12%	11%
Don't know	6%	6%
Base: Total Sample	n=3,741	n=3,697

# TOTAL SAMPLE VS. RECENT VISITORS TO CENTRAL OTAGO



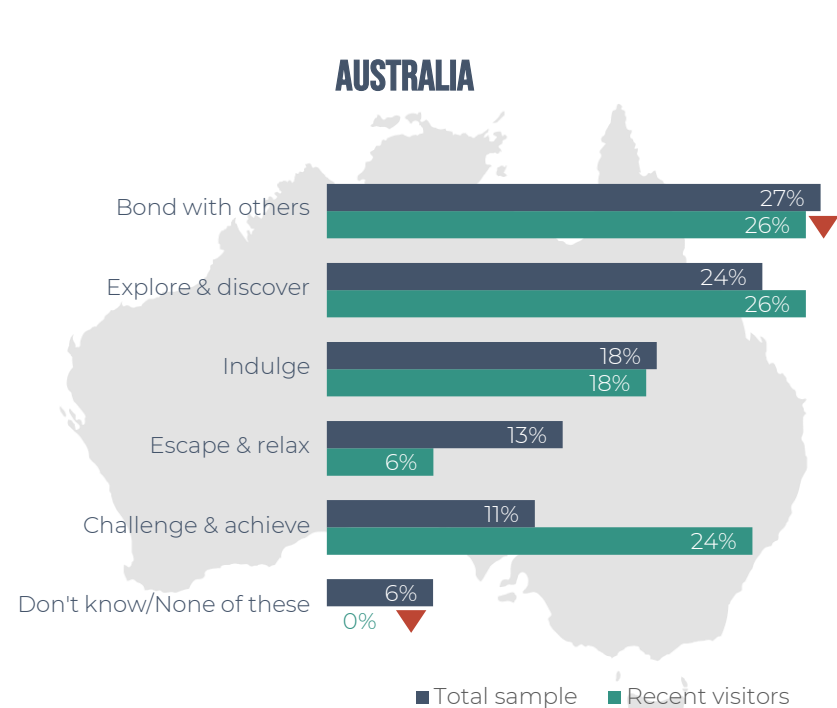
Which one of the following best describes you and your views on travel and holidays?

## NEW ZEALAND



Base: Total sample, excluding residents (n=3,753); Visited Central Otago P12M (n=302)

## AUSTRALIA



Base: Total sample (n=3,697); Visited Central Otago P12M (n=34)

# FAMILIARITY & DESTINATION APPEAL



How familiar are you with Central Otago as a destination to visit for a short break or holiday?  
 How appealing is Central Otago to you as a destination for a short break or holiday?

Familiarity	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
I have visited Central Otago	33%	31%	40% ▲	25% ▼	34%	32%
I have never visited, but do have some ideas about what you can do there	15%	17%	17%	16%	20% ▲	16%
I have never visited, and don't know much about what you can do there	35%	36%	29% ▼	40% ▲	29% ▼	34%
I have never heard of Central Otago	17%	16%	14% ▼	19%	17%	17%
Base: Total sample (excluding residents)	n=2,397	n=1,567	n=1,290	n=998	n=745	n=7,450

Appeal	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
Highly appealing	38%	46% ▲	45% ▲	33% ▼	45% ▲	40%
Somewhat appealing	42%	41%	41%	46% ▲	40%	42%
Not very appealing	11% ▲	6% ▼	8%	11%	8%	9%
Not at all appealing	2%	1% ▼	2%	3%	2%	2%
Don't know / NA	7%	6%	5% ▼	7%	5% ▼	7%
Base: Total sample (excluding residents, heard of Central Otago)	n=1,998	n=1,310	n=1,111	n=807	n=619	n=6,183



## CENTRAL OTAGO POSITIONING



To what extent do you agree or disagree with the following statements?

A holiday in Central Otago is an opportunity to slow down and relax

	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
Strongly agree	27%	28%	29%	21% ▼	30%	26%
Somewhat agree	47%	49%	50%	48%	46%	48%
Neither agree nor disagree	23%	19% ▼	19% ▼	28% ▲	20%	23%
Somewhat disagree	2%	2%	2%	3%	4%	3%
Strongly disagree	1%	0% ▼	0% ▼	1%	0% ▼	1%
Base: Module sample – Heard of Central Otago (excl. residents)	n=1,212	n=826	n=705	n=504	n=411	n=3,874

Central Otago is an ideal place to reconnect with friends and family

	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
Strongly agree	20%	20%	22%	13% ▼	25% ▲	19%
Somewhat agree	39%	42%	40%	37%	40%	39%
Neither agree nor disagree	32%	32%	31%	39% ▲	27% ▼	34%
Somewhat disagree	6%	4% ▼	5%	8%	5%	6%
Strongly disagree	3%	2%	2%	2%	3%	3%
Base: Module sample – Heard of Central Otago (excl. residents)	n=1,212	n=826	n=705	n=504	n=411	n=3,874

# ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO



Which, if any, of the following activities or experiences do you associate with Central Otago?

Activities / Experiences	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
Walking & Hiking	44%	44%	50% ▲	39% ▼	42%	44%
Nature, Wildlife & Eco-tourism	37%	39%	36%	35%	36%	36%
Scenic Sight-Seeing	36%	34%	36%	32%	28% ▼	34%
History & Heritage	31%	30%	32%	28%	32%	30%
Wineries, Breweries or Distilleries	33%	31%	34% ▲	25% ▼	24% ▼	30%
Cycling/Mountain Biking	30%	28%	33% ▲	26%	28%	29%
Restaurants, Cafés & Bars	30%	28%	33% ▲	23% ▼	29%	28%
Family Activities	30% ▲	28%	28%	22% ▼	28%	27%
Fishing or Hunting	24%	23%	28% ▲	21%	27%	24%
Gardens, Parks & Reserves	24%	27%	27%	23%	25%	24%
Adrenaline Activities	20%	19%	21%	18%	17%	19%
Skiing/Snowboarding	18%	17%	21%	16%	18%	18%
Water-based Activities	15%	14%	15%	13%	16%	15%
Shopping	15%	15%	17% ▲	11% ▼	16%	14%
Arts & Culture	12%	15%	15%	11%	15%	13%
Spa & Wellness	11%	14%	12%	13%	11%	12%
Golf	12%	10%	14%	10%	13%	12%
Māori/Pacific Culture	9% ▼	16% ▲	13%	12%	12%	12%
Events, Concerts & Festivals	11%	13%	12%	10%	12%	11%
Volcanic & Geothermal	6%	9%	7%	8%	13% ▲	7%
Casinos/Gambling	4%	4%	6% ▲	4%	5%	4%
Don't know/None of the above	17%	14% ▼	13% ▼	21% ▲	12% ▼	17%
Base: Module sample - heard of Central Otago, excl. residents	n=1,212	n=826	n=705	n=504	n=411	n=3,874

TRAVELLER PERSONAS

# NET PROMOTER SCORE (NPS)



On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend Central Otago as a travel destination to a friend, family member, or colleague?

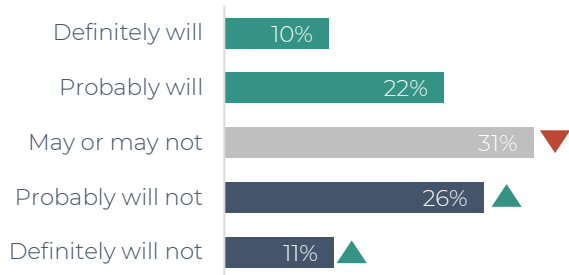
		Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
Promoters	10 (Extremely likely)	21%	24%	25%	20%	23%	22%
	9	17%	20%	15%	13%	20%	17%
Passive	8	23%	20%	22%	23%	21%	22%
	7	15%	17%	16%	16%	16%	16%
Detractors	6	9%	8%	9%	9%	10%	9%
	5	8%	6%	6%	8%	7%	7%
	4	3%	2%	3%	3%	0%	3%
	3	2%	2%	1%	2%	0%	1%
	2	1%	0%	0%	1%	0%	0%
	1	0%	0%	0%	1%	0%	0%
	0 (Not at all likely)	2%	2%	2%	4%	3%	2%
NPS		+14	+24	+16	+6	+22	+16
	Base: Visited Central Otago previously	n=797	n=487	n=510	n=245	n=255	n=2,412

# PROPENSITY TO VISIT CENTRAL OTAGO

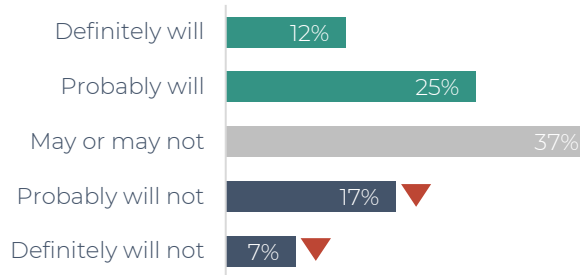


How likely are you to visit Central Otago within the next 12 months? (for any reason)

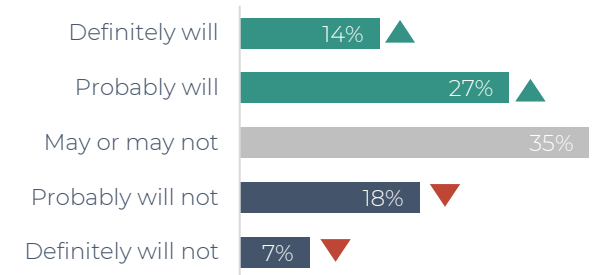
## BOND WITH OTHERS



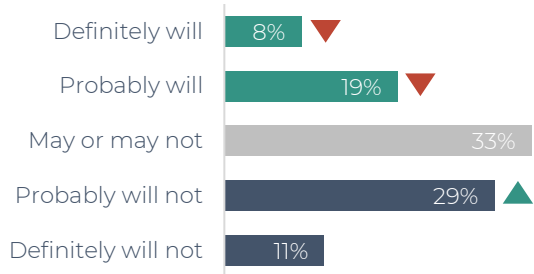
## EXPLORE & DISCOVER



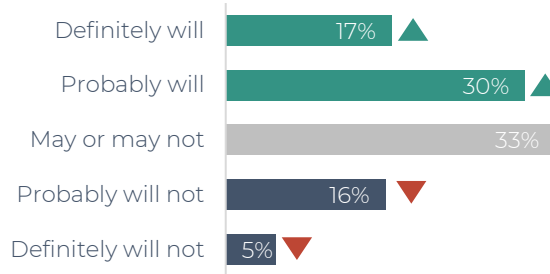
## INDULGE



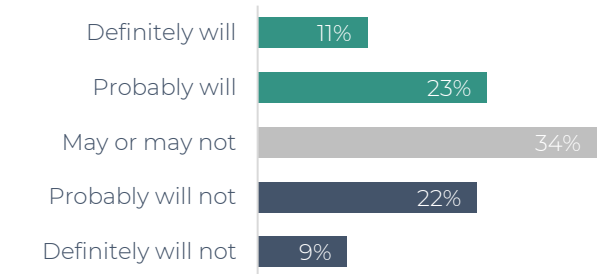
## ESCAPE & RELAX



## CHALLENGE & ACHIEVE



## TOTAL SAMPLE



Base: Intend to travel around/to New Zealand in next 12 months and heard of Central Otago – Bond with others (n=1,814), Explore & discover (n=1,132), Indulge (n=988), Escape & relax (n=696), Challenge & achieve (n=573), Total sample (n=5,467)

▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# BARRIERS TO VISITING CENTRAL OTAGO



You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?

	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
I have no specific reason to visit	50%	41% ▲	45%	52%	41%	48%
I don't have any connections there	39% ▲	28%	26% ▼	29%	25%	33%
It's inconvenient to get there	27%	23%	23%	25%	20%	25%
I don't know enough about what there is to do there	25%	20%	11% ▼	23%	18%	21%
It has nothing that interests me	23%	17%	15%	21%	20%	20%
I've been there before	13% ▲	21%	36% ▲	11% ▼	19%	18%
Accommodation is too expensive	13%	14%	8%	11%	14%	12%
Activities / attractions are too expensive	8%	8%	7%	9%	11%	8%
It is not for people like me	6%	4%	9%	6%	8%	6%
The climate / weather discourages me from visiting	5%	5%	5%	6%	13% ▲	6%
It's difficult to get around	4%	7%	7%	6%	5%	5%
It is too touristy	2%	6%	3%	2%	6%	3%
It's not suitable for younger family	4%	2%	2%	4%	1%	3%
It is too busy / crowded	2%	1%	2%	4%	6%	3%
I am concerned it may not be safe	1%	2%	2%	1%	2%	2%
Other	8%	12%	7%	9%	9%	9%
Base: Intend to travel around/to New Zealand N12M and have heard of Central Otago, but are unlikely to visit	n=536	n=224	n=203	n=201	n=93	n=1,350

