



VISITOR INSIGHTS PROGRAMME

MARKET PERCEPTIONS: CENTRAL OTAGO

YEAR ENDING DECEMBER 2024

BACKGROUND & RESEARCH APPROACH

MARKET PERCEPTIONS: CENTRAL OTAGO

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. Market Perceptions 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 survey is conducted online, including on mobile devices, with a sample of at least 7,200 New Zealand and Australian travellers each year. This includes 300 New Zealanders and 300 Australians per month, recruited via Dynata's consumer panel. Participants must be 18+ years old and have travelled overnight in the past 12 months. Quotas based on census data (region, gender, and age) ensure a representative sample for accurate trend monitoring. This report is based on data collected between January – December 2024, with some longitudinal references back to 2022.

The 'NZ Regional Benchmark' referenced in this report is the average across 16 destinations – Coromandel, Hawke's Bay, Taupo, Waitaki, Bay of Plenty, Waikato, Ruapehu, Gisborne, Dunedin, Auckland, Marlborough, Northland, Wellington, Queenstown, Rotorua, and Central Otago,

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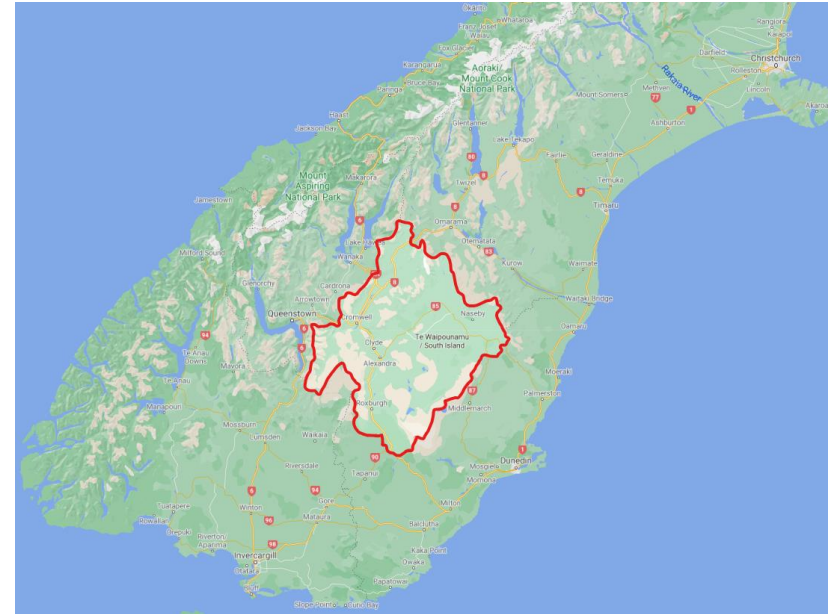
MARKET PERCEPTIONS

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.



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INSIGHTS



CENTRAL OTAGO INSIGHTS: YEAR ENDING DECEMBER 2024

DOMESTIC TRAVEL MARKET



- Two out of three (69%) New Zealanders have travelled in New Zealand in the past 12 months, with 7% of domestic travellers visiting Central Otago. This percentage has declined from the 10% recorded in 2022.
- The majority of Central Otago's current visitors (63%) come from the South Island, with Canterbury being the largest domestic market. However, when asked about future travel intentions, the North Island's share of prospective visitors increases to 53%.
- 32% of New Zealand travellers who intend to travel domestically in the next 12 months say they intend to visit Central Otago
- Central Otago attracts a broad range of domestic visitors, with a demographic skew to 60-69 years compared to the wider domestic travel market.
- When thinking of Central Otago, beautiful scenery, wine and fruits are top-of-mind for the domestic market.
- Central Otago's natural scenery, adventure/outdoor recreation and relaxation are seen to be its main draws for domestic travellers, with the natural scenery offering a distinct competitive advantage over most other New Zealand destinations.
- Central Otago is associated with a wide range of activities, including walking/hiking, cycling, wineries, sight-seeing, nature, and history & heritage.
- 75% of domestic travellers agree that a holiday in Central Otago is an opportunity to slow down and relax. 56% agree that Central Otago is an ideal place to reconnect with friends and family.
- Central Otago's current Net Promoter Score (NPS) is +16, slightly above the regional benchmark of -8. For recent domestic visitors, however, the NPS increases to +48, well above the regional benchmark of +12, reflecting a positive visitor experience.
- The primary barrier to visiting Central Otago is having no specific reason to visit.
- Central Otago is converting awareness into a propensity to visit at a rate comparable to the regional benchmark for the domestic travel market.

CENTRAL OTAGO INSIGHTS: YEAR ENDING DECEMBER 2024

AUSTRALIAN TRAVEL MARKET



- 8% of Australians who travelled to New Zealand in the past 12 months visited Central Otago on their trip. This is an increase from an 6% share in the previous two years. However, only 3% of Australian travellers stayed overnight in Central Otago.
- While Central Otago attracts a broad range of Australian visitors, there is a notable skew towards visitors from New South Wales.
- 28% of Australian travellers have never heard of Central Otago. 39% of Australian travellers are aware of Central Otago but are unsure of what to do there, pointing to an opportunity to educate this market.
- When thinking of Central Otago (for those with awareness of the region), beautiful scenery, mountains, and wine are top-of-mind for Australian travellers.
- Walking/hiking, nature and wildlife experiences, scenic sightseeing and history/heritage are the top activities linked with the region. The region has a strong association with walking/hiking experiences compared to other destinations.
- 74% of Australian travellers agree that a holiday in Central Otago is an opportunity to slow down and relax. 62% agree that Central Otago is an ideal place to reconnect with friends and family.
- Central Otago's current Net Promoter Score (NPS) is +23, slightly above the regional benchmark of +21. For recent Australian visitors, the NPS increases to +35, just below the regional benchmark of +44.
- Three in five (63%) Australian travellers planning to visit New Zealand in the next 12 months, say that they intend to visit Central Otago. This is a significantly higher proportion than in previous years.
- The profile of prospective Australian visitors to Central Otago skews younger (20-39 years) compared to the total market.
- The primary barrier for Australian visitors is having no specific reason to visit.
- Central Otago is converting awareness into a propensity to visit at a rate comparable to the regional benchmark for the Australian market.

CENTRAL OTAGO INSIGHTS: YEAR ENDING DECEMBER 2024

TRAVELLER PERSONAS



- Five travel personas have been developed for Tourism Central Otago and the survey responses have been allocated to those five personas.
- The five personas are: 'bond with others', 'challenge and achieve', 'explore and discover', 'indulge', and 'escape and relax' (see page 49 for details).
- The relative size of each persona segment varies between the New Zealand and Australian travel markets, and can vary over time.
- 'Bond with others' currently has the largest share, accounting for more than one third of the domestic market, and more than one quarter of the Australian traveller market.
- The profile is a little different for Central Otago. 'Bond with others' is the biggest category for recent domestic visitors, but 'explore and discover' and 'indulge' are both larger segments for recent Australian visitors.
- 'Explore and discover' and 'indulge' give the highest Net Promotor Scores for Central Otago, at +24 and +23 respectively.
- 'Explore & discover' strongly associates Central Otago with outdoor activities like walking, nature, and sight-seeing, as well as history & heritage.
- 'Indulge' is more likely to have visited Central Otago before and also more likely to find it highly appealing. This group is more likely to strongly agree that 'a holiday in Central Otago is an opportunity to slow down and relax' and that 'Central Otago is an ideal place to reconnect with friends and family'. It is also the group most likely to visit Central Otago in the next 12 months.
- 'Bond with others' and 'escape and relax' are the two least likely groups to visit Central Otago in the next 12 months, with 'no reasons to visit' being the most common reason.
- 'Escape & relax' is the least likely to be familiar with the region, and is the least likely to find Central Otago highly appealing.

A woman wearing a light-colored, wide-brimmed hat and a light-colored, textured sweater 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 blue filter. On the left side, there is a large white circle containing the word "SNAPSHOT" in a bold, sans-serif font.

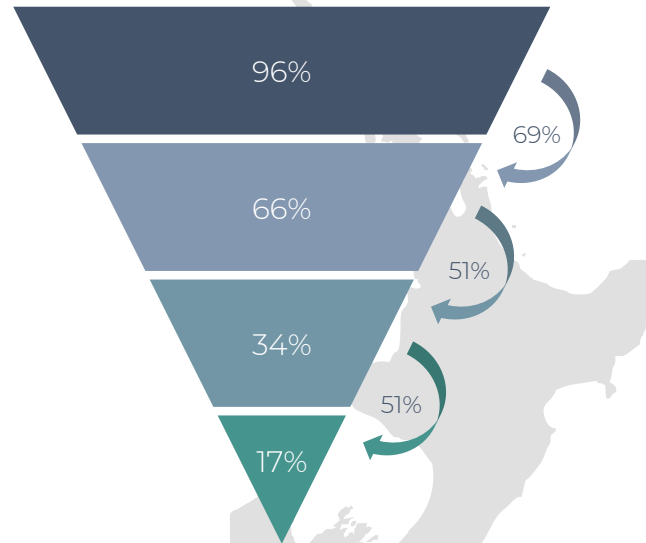
SNAPSHOT

CENTRAL OTAGO SNAPSHOT: YEAR ENDING DECEMBER 2024

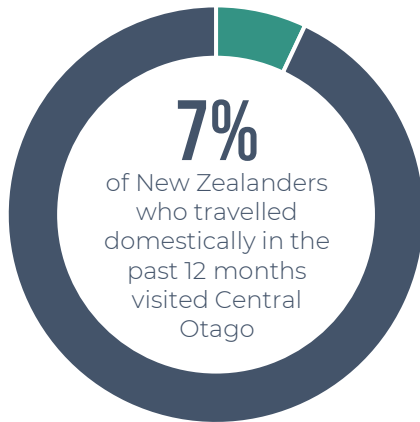
DOMESTIC TRAVEL MARKET



CENTRAL OTAGO



- AWARENESS**
Have heard of Central Otago
- FAMILIARITY**
Have either visited Central Otago or have some ideas about what there is to do there
- APPEAL**
Rate Central Otago as a highly appealing destination
- PROPENSITY TO VISIT**
Intend to visit Central Otago within next 12 months (probably / definitely will visit)



Domestic travellers associate Central Otago with...

- Walking & Hiking (50%)
- Cycling/Mountain Biking (40%)
- Wineries, breweries or distilleries (40%)
- Scenic Sight-Seeing (39%)
- Nature, Wildlife & Eco-tourism (38%)

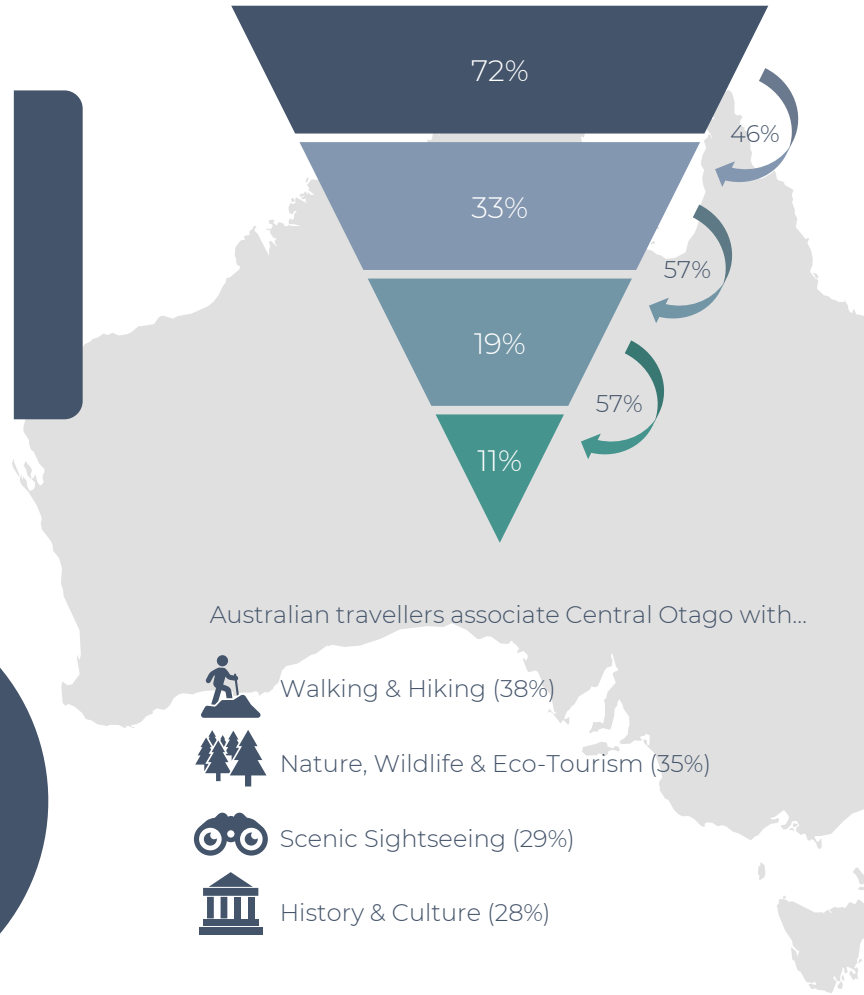


CENTRAL OTAGO SNAPSHOT: YEAR ENDING DECEMBER 2024

AUSTRALIAN TRAVEL MARKET



CENTRAL OTAGO

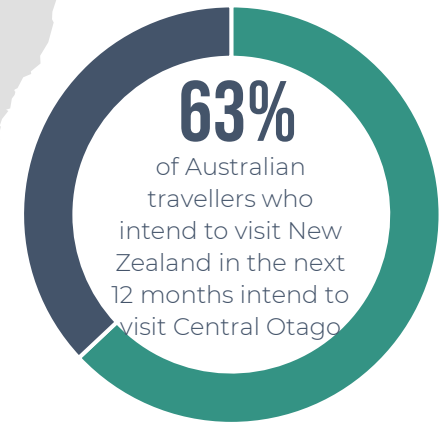


AWARENESS	Have heard of Central Otago
FAMILIARITY	Have either visited Central Otago or have some ideas about what there is to do there
APPEAL	Rate Central Otago as a highly appealing destination
PROPENSITY TO VISIT	Intend to visit Central Otago within next 12 months (probably / definitely will visit)



Australian travellers associate Central Otago with...

- Walking & Hiking (38%)
- Nature, Wildlife & Eco-Tourism (35%)
- Scenic Sightseeing (29%)
- History & Culture (28%)



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.

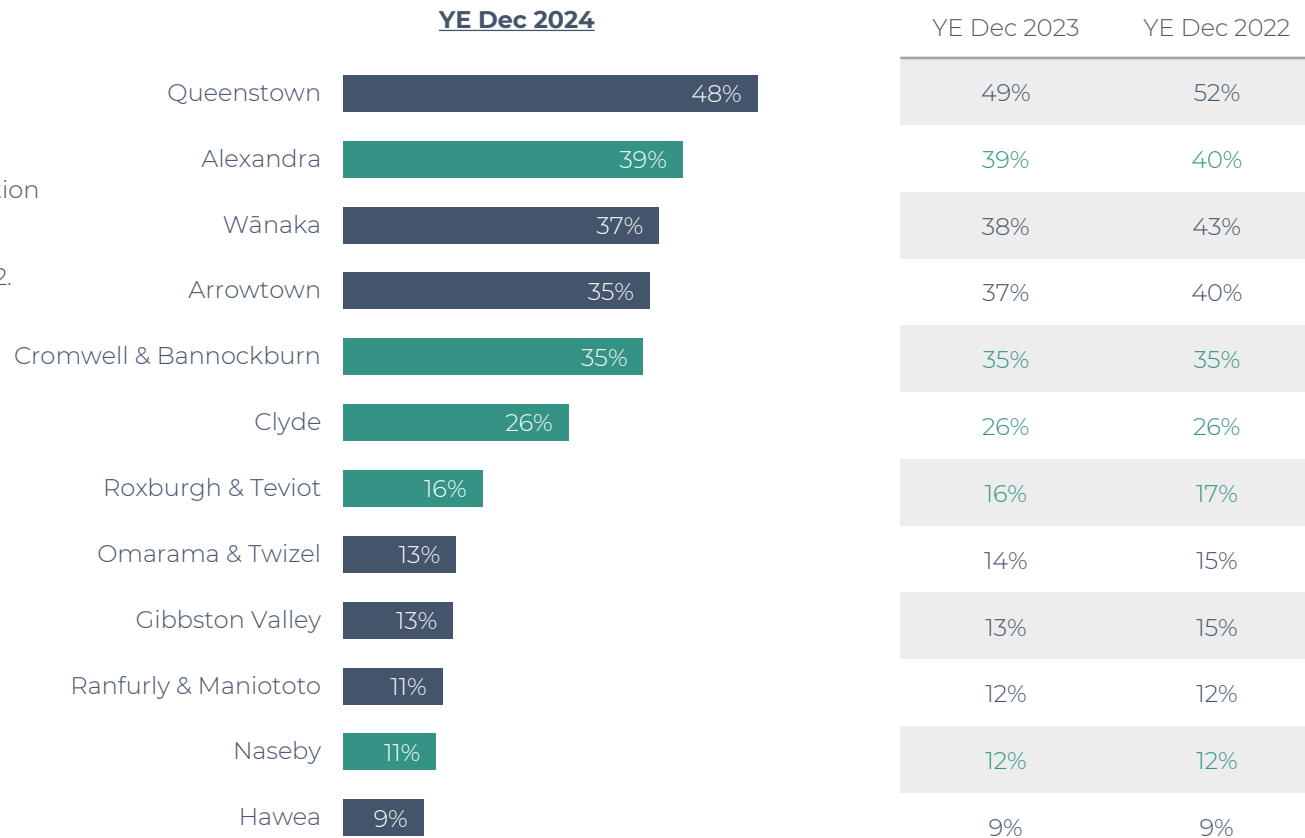
**DOMESTIC
TRAVEL MARKET**

CENTRAL OTAGO TOP-OF-MIND PLACES

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

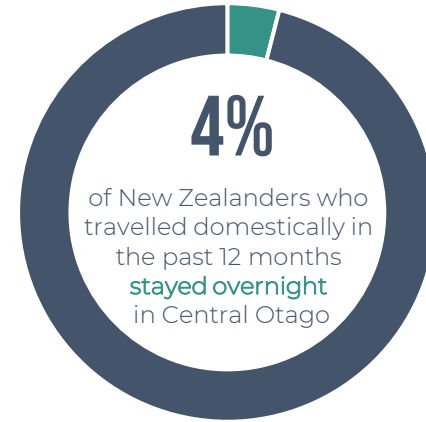


There has been a slight reduction in the association of Queenstown, Wanaka and Arrowtown with Central Otago since 2022.

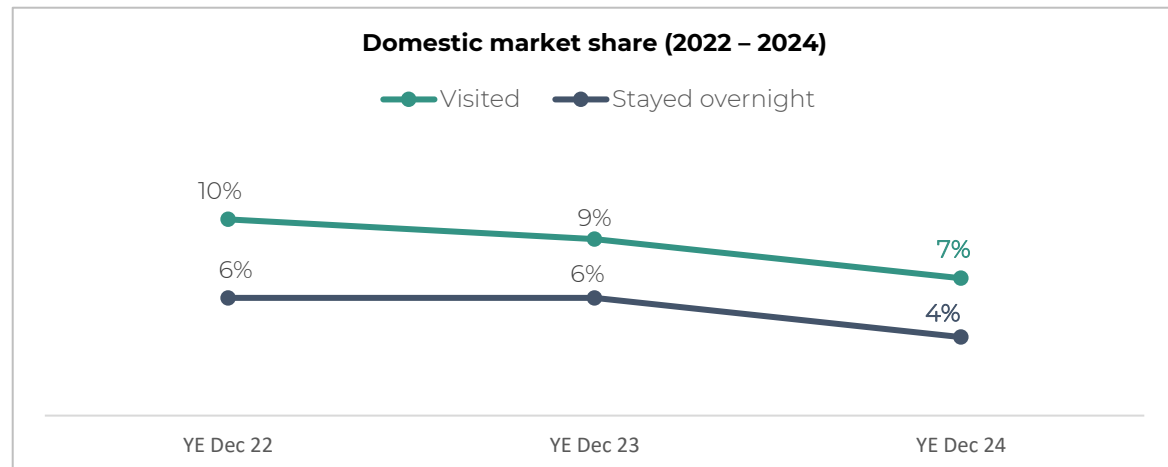


TOURISM MARKET SHARE

In the past 12 months, where (if anywhere) have you travelled?



Base: Total Sample (YE Dec 24) - NZ Domestic Travellers (travelled within NZ in past 12 months), excl. Central Otago Residents (n=3232)



RECENT VISITOR PROFILE

In the past 12 months, where (if anywhere) have you travelled?



Region of Residence	Total Sample	Visited Central Otago past 12 months	
Northland	4%	3%	
Auckland	34%	17%	▼
Waikato	10%	5%	▼
Bay of Plenty	6%	1%	▼
Tairāwhiti / Gisborne	1%	0%	▼
Hawke's Bay	4%	0%	▼
Taranaki	2%	1%	
Manawatū-Whanganui	5%	2%	
Wellington (& Wairarapa)	11%	7%	▼
Tasman	1%	0%	▼
Nelson	1%	2%	
Marlborough	1%	2%	
West Coast	1%	2%	
Canterbury	13%	25%	▲
Otago	5%	20%	▲
Southland	2%	12%	▲
North Island (NET)	66%	37%	▼
South Island (NET)	34%	63%	▲

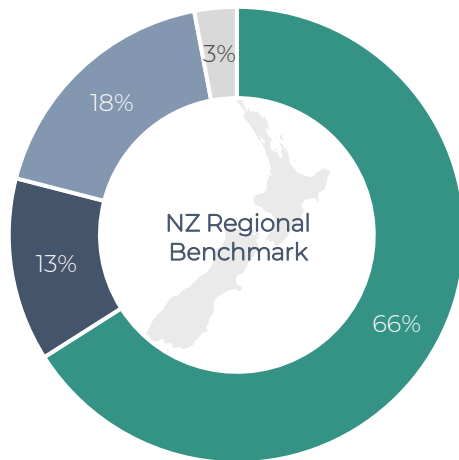
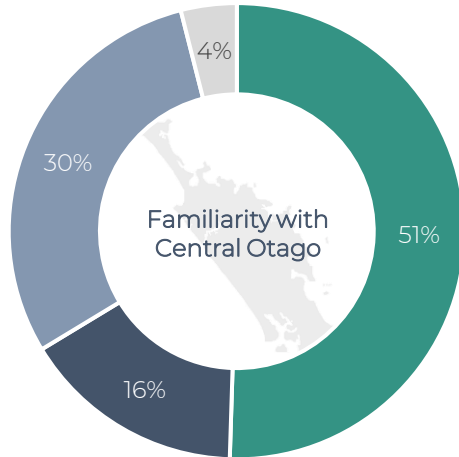
Age	Total Sample	Visited Central Otago past 12 months	
18-19 years	4%	2%	▼
20-29 years	18%	11%	▼
30-39 years	17%	16%	
40-49 years	17%	15%	
50-59 years	17%	18%	
60-69 years	13%	19%	▲
70+ years	14%	19%	

Household Composition	Total Sample	Visited Central Otago past 12 months	
My husband, wife or partner	60%	64%	
My mother and/or father	8%	4%	▼
My children aged under 5	11%	6%	▼
My children aged 5 to 14	17%	18%	
My children aged 15 or older	14%	14%	
Other family/relatives	9%	5%	▼
Other person(s)	8%	6%	
None of the above – I live alone	15%	18%	

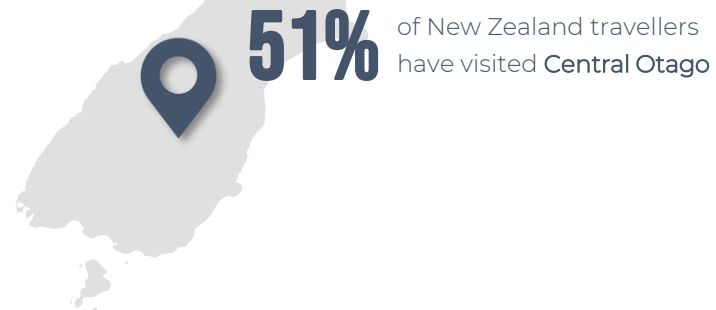
▲ / ▼ Significantly higher or lower than total sample at 95% confidence

FAMILIARITY

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



- Have visited (ever)
- Have never visited but have some ideas about what you can do there
- Have never visited and don't know much about what you can do there
- Have never heard of

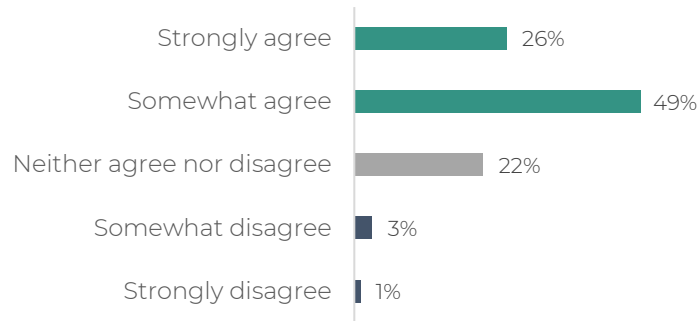


POSITIONING

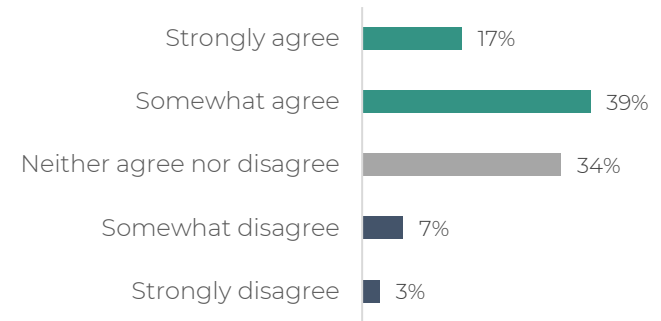
To what extent do you agree or disagree with each of the following statements?



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

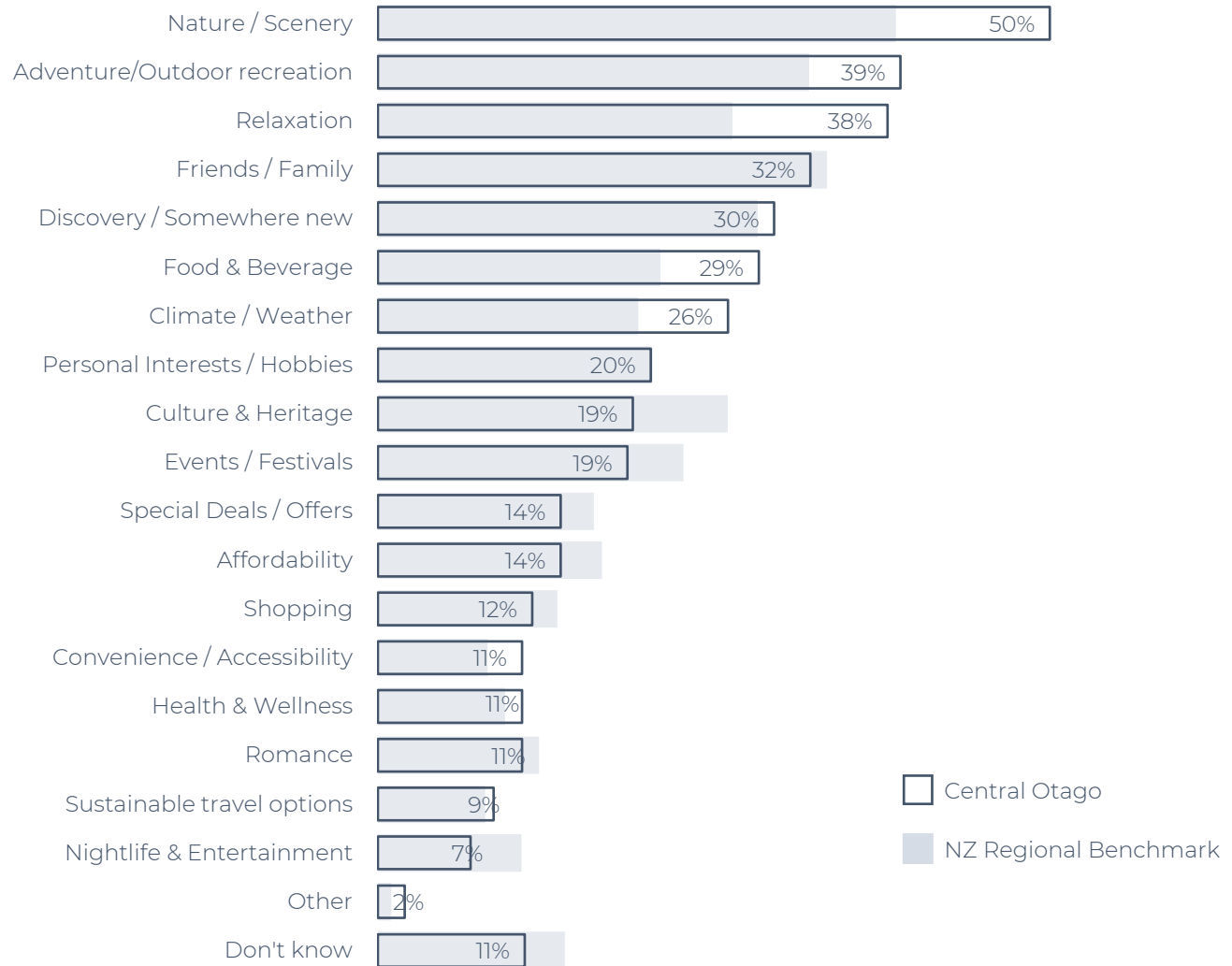


	YE Dec 22	YE Dec 23	YE Dec 24
Strongly agree	25%	29%	26%
Somewhat agree	46%	45%	49%
Neither agree nor disagree	24%	21%	22%
Somewhat disagree	4%	3%	3%
Strongly disagree	1%	1%	1%
Base: Heard of Central Otago, excluding residents n=	1554	2053	2278

	YE Dec 22	YE Dec 23	YE Dec 24
Strongly agree	18%	21%	17%
Somewhat agree	34%	37%	39%
Neither agree nor disagree	36%	32%	34%
Somewhat disagree	8%	7%	7%
Strongly disagree	4%	3%	3%
Base: Heard of Central Otago, excluding residents n=	1554	2,053	2278

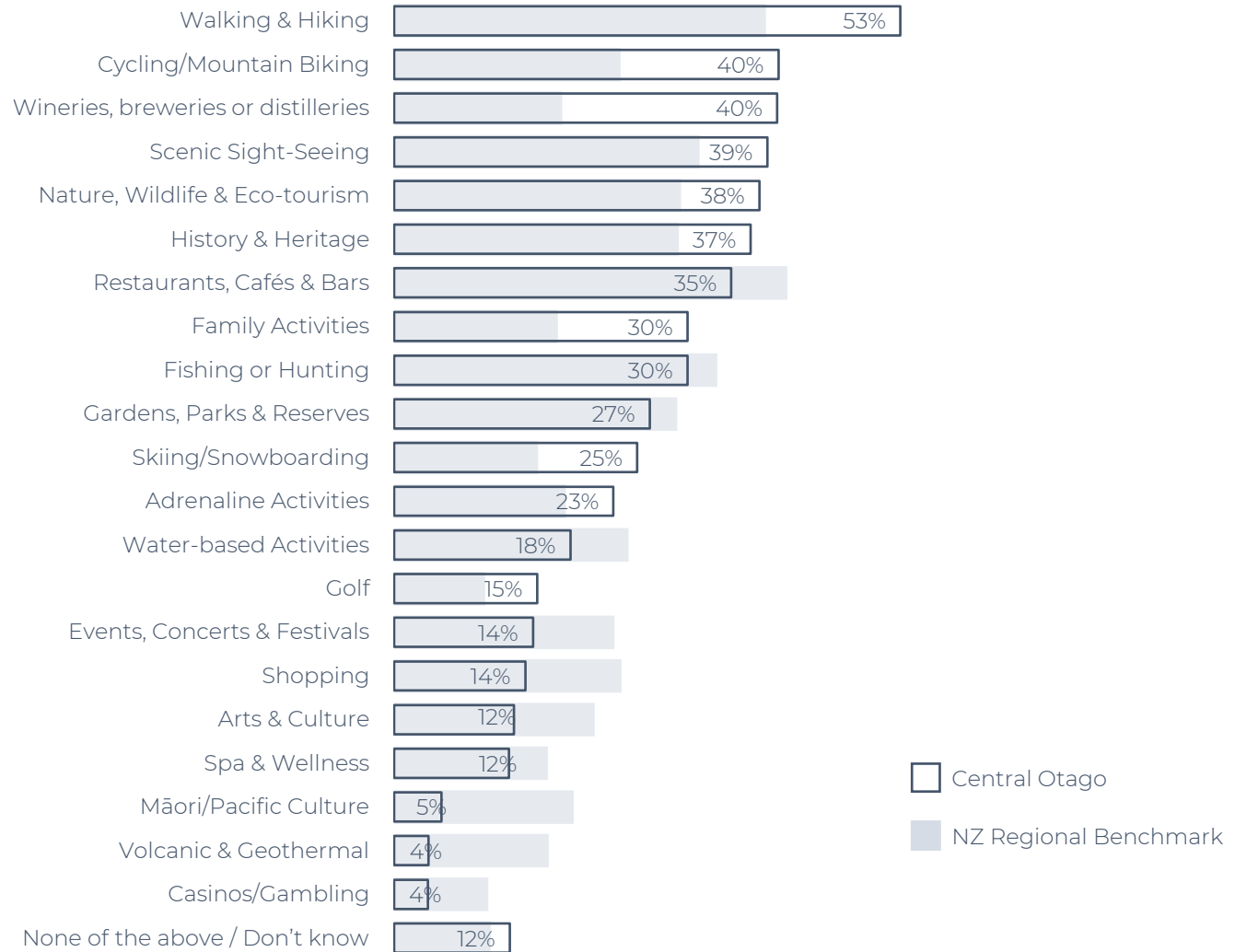
DESTINATION DRIVERS

Why might someone choose to visit Central Otago instead of another New Zealand destination?



ACTIVITIES / EXPERIENCES

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



ACTIVITIES / EXPERIENCES

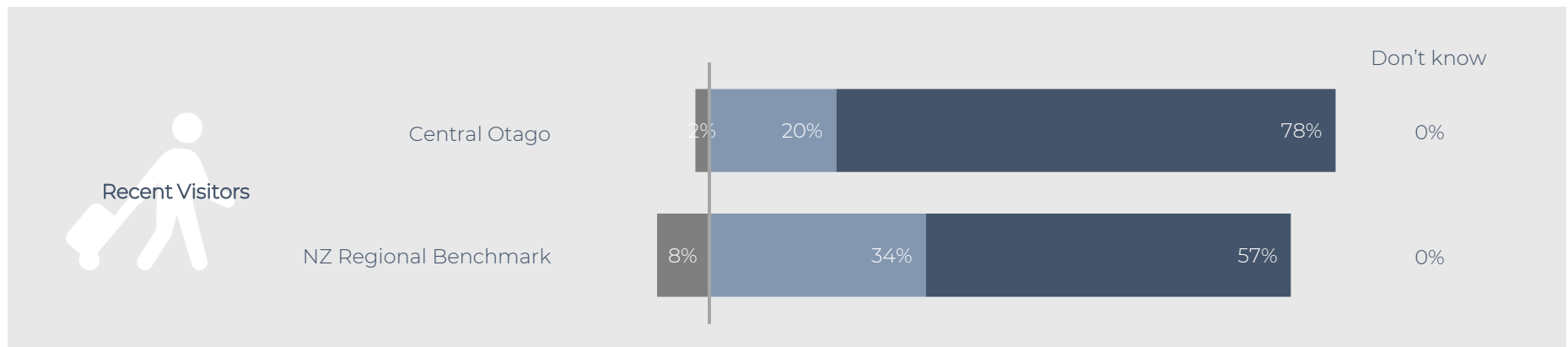
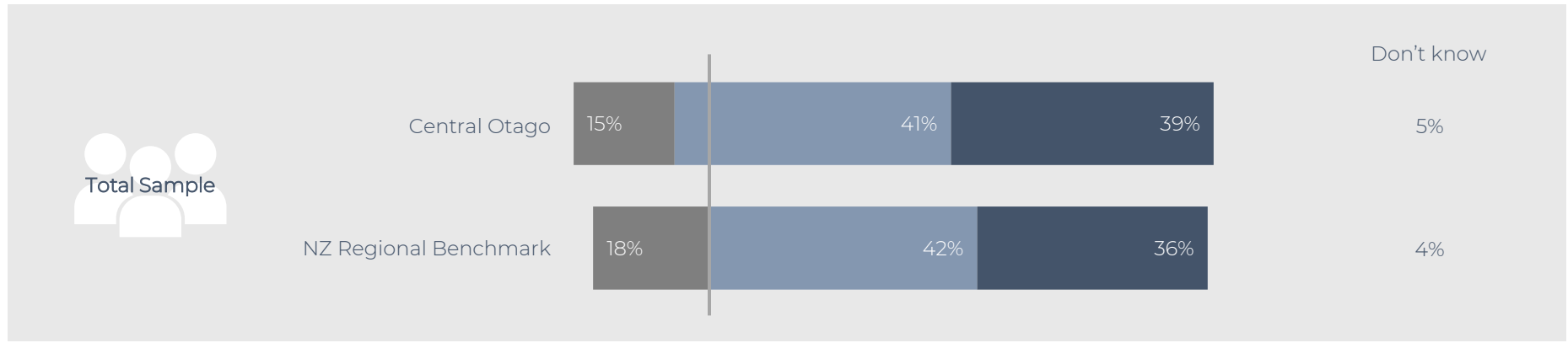
Which, if any, of the following activities or experiences do you associate with Central Otago?



	YE Dec 22	YE Dec 23	YE Dec 24
Walking & Hiking	47%	50%	53%
Cycling/Mountain Biking	36%	38%	40%
Wineries, breweries or distilleries*	-	39%	40%
Scenic Sight-Seeing	34%	39%	39%
Nature, Wildlife & Eco-tourism	34%	39%	38%
History & Heritage	34%	34%	37%
Restaurants, Cafés & Bars	32%	35%	35%
Family Activities	29%	32%	30%
Fishing or Hunting*	-	29%	30%
Gardens, Parks & Reserves	24%	26%	27%
Skiing/Snowboarding	21%	23%	25%
Adrenaline Activities	22%	24%	23%
Water-based Activities	16%	17%	18%
Golf*	-	15%	15%
Events, Concerts & Festivals	13%	13%	14%
Shopping	12%	15%	14%
Arts & Culture	10%	12%	12%
Spa & Wellness	10%	11%	12%
Māori/Pacific Culture	5%	6%	5%
Volcanic & Geothermal	3%	4%	4%
Casinos/Gambling	4%	4%	4%
Don't know/None of the above	17%	14%	12%
Base: Module sample (n=)	1554	2055	2278

DESTINATION APPEAL

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



Not very appealing / Not at all appealing
 Somewhat appealing
 Highly appealing

DESTINATION APPEAL

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



	YE Dec 22	YE Dec 23	YE Dec 24
Highly Appealing	41%	42%	39%
Somewhat Appealing	38%	40%	41%
Not very Appealing	12%	11%	12%
Not at all Appealing	3%	3%	3%
Don't know/NA	6%	5%	5%
Base: Heard of Central Otago, excluding residents n=	3625	3611	3469

	YE Dec 22	YE Dec 23	YE Dec 24
Highly Appealing	78%	77%	78%
Somewhat Appealing	20%	20%	20%
Not very Appealing	1%	2%	2%
Not at all Appealing	0%	0%	0%
Don't know/NA	0%	0%	0%
Base: Visited Central Otago P12M n=	348	302	227

NET PROMOTOR SCORE (NPS)

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 (or destination). A 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.



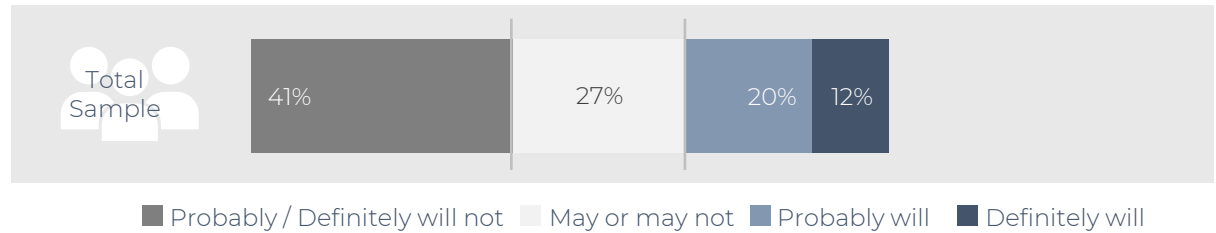
▲ / ▼ Higher or lower than YE Dec 2023.

PROPENSITY TO VISIT

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



32% of New Zealand travellers who intend to travel domestically in the next 12 months intend to visit Central Otago



Base: Total Sample - NZ Travellers Intend to Travel Domestically in Next 12 Months Heard of Central Otago, excl. Central Otago Residents (n=2877)

	YE Dec 22	YE Dec 23	YE Dec 24
Definitely will	11%	10%	12%
Probably will	17%	19%	20%
May or may not	27%	29%	27%
Probably / Definitely will not	45%	41%	41%
Base: (n=)	3541	3517	2877

PROSPECTIVE VISITOR PROFILE

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



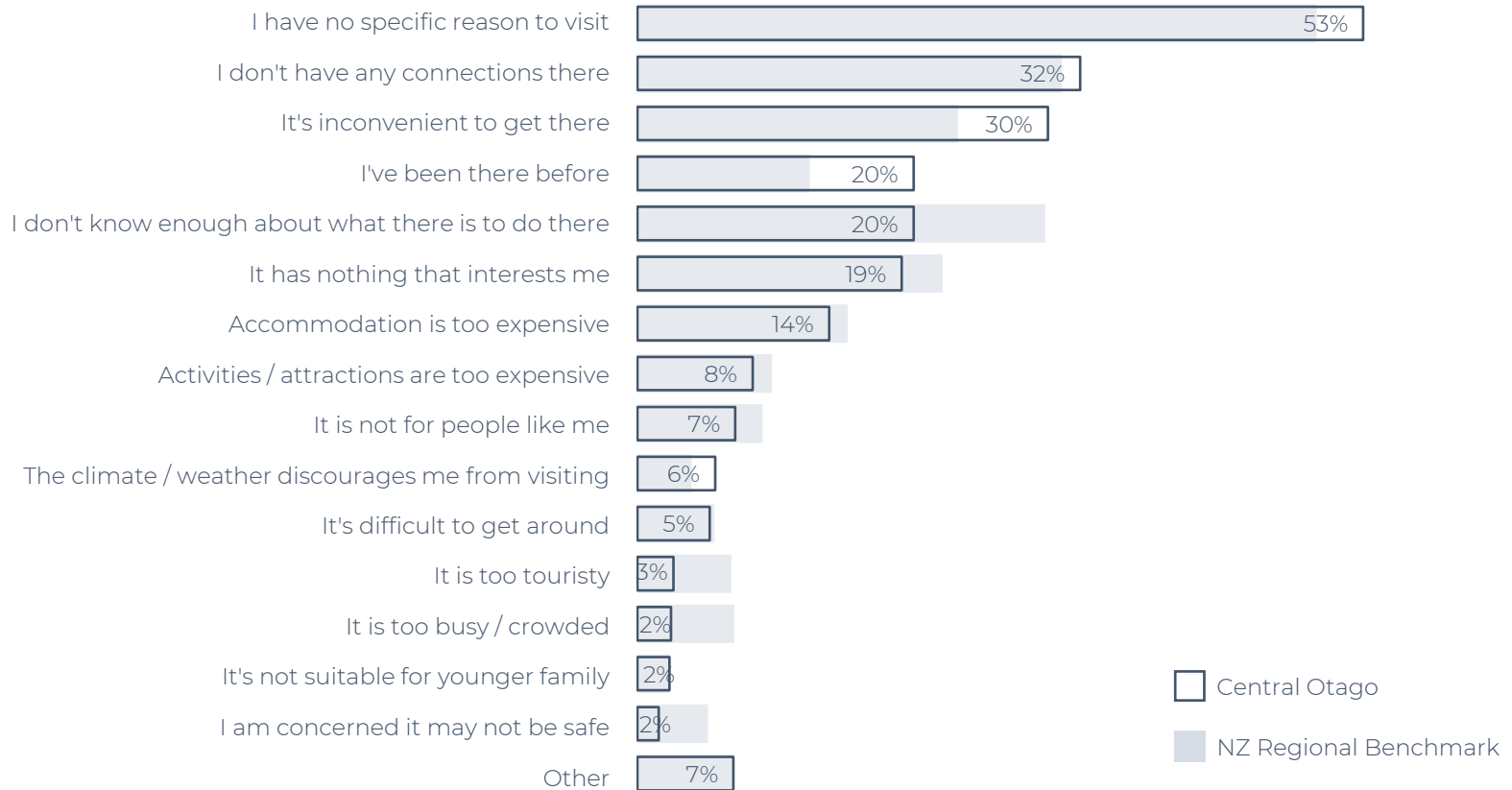
	Total Sample	Prospective Visitors
Region of Residence		
Northland	4%	1% ▼
Auckland	34%	32%
Waikato	10%	7% ▼
Bay of Plenty	6%	3% ▼
Tairāwhiti / Gisborne	1%	0% ▼
Hawke's Bay	4%	1% ▼
Taranaki	2%	0% ▼
Manawatū-Whanganui	5%	3% ▼
Wellington (& Wairarapa)	11%	6% ▼
Tasman	1%	1%
Nelson	1%	0% ▼
Marlborough	1%	1%
West Coast	1%	1%
Canterbury	13%	22% ▲
Otago	5%	17% ▲
Southland	2%	5% ▲
North Island (NET)	66%	53% ▼
South Island (NET)	34%	47% ▲

	Total Sample	Prospective Visitors
Age		
18-19 years	4%	2% ▼
20-29 years	18%	17%
30-39 years	17%	20%
40-49 years	17%	17%
50-59 years	17%	16%
60-69 years	13%	12%
70+ years	14%	15%
Household Composition		
My husband, wife or partner	60%	70% ▲
My mother and/or father	8%	8%
My children aged under 5	11%	11%
My children aged 5 to 14	17%	21%
My children aged 15 or older	14%	13%
Other family/relatives	9%	6% ▼
Other person(s)	8%	5% ▼
None of the above – I live alone	15%	10% ▼

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

BARRIERS TO VISITING

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



CONVERTING AWARENESS TO VISITATION

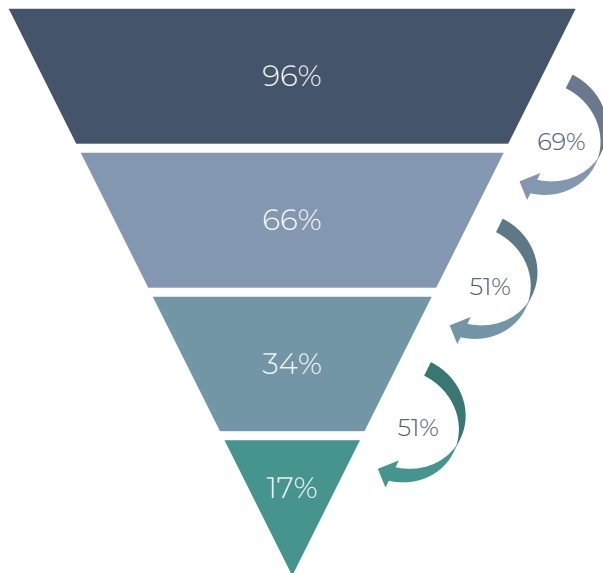


The funnel metric below illustrates the path to purchase, from awareness to likelihood of future visits. It measures: awareness of Central Otago, knowledge of the region, appeal as a destination, and the likelihood of visiting. The majority (96%) of New Zealand travellers have heard of Central Otago. As we move down the funnel, each stage introduces a new measure. The 17% at the bottom represents travellers who:

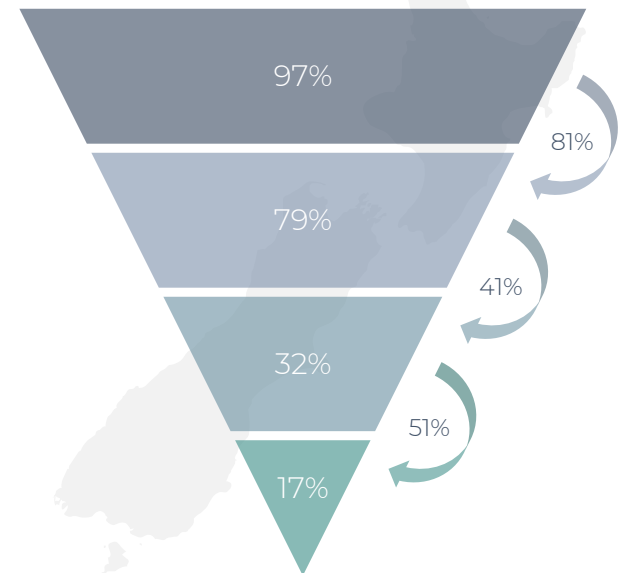
- Have heard of Central Otago
- Are familiar with Central Otago (have either visited or have some ideas about what there is to do there)
- Rate Central Otago as a highly appealing destination
- Intend to visit Central Otago within the next 12 months

The smaller numbers on the right indicate conversion between stages.

CENTRAL OTAGO



NZ REGIONAL BENCHMARK



CONVERTING AWARENESS TO VISITATION



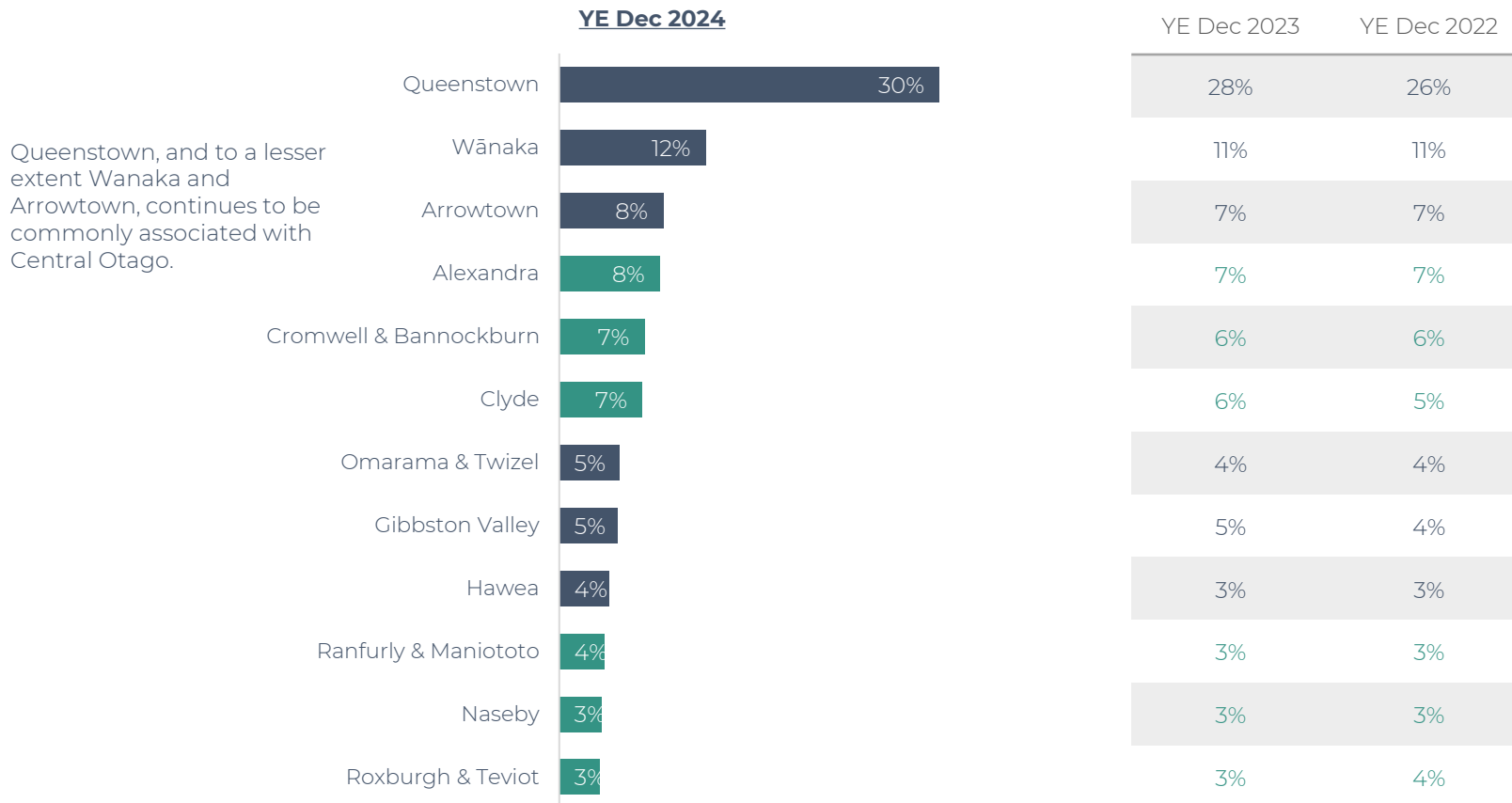
	YE Dec 22	YE Dec 23	YE Dec 24
AWARENESS Have heard of Central Otago	96%	96%	96%
FAMILIARITY Have either visited Central Otago or have some ideas about what there is to do there	66%	67%	66%
APPEAL Rate Central Otago as a highly appealing destination	34%	35%	34%
PROPENSITY TO VISIT Intend to visit Central Otago within next 12 months (probably / definitely will visit)	17%	17%	17%
	69%	69%	69%
	51%	52%	51%
	49%	49%	51%

A woman wearing a light-colored hat and a light-colored top is seen from behind, walking across a wooden 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.

**AUSTRALIAN
TRAVEL MARKET**

CENTRAL OTAGO TOP-OF-MIND PLACES

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



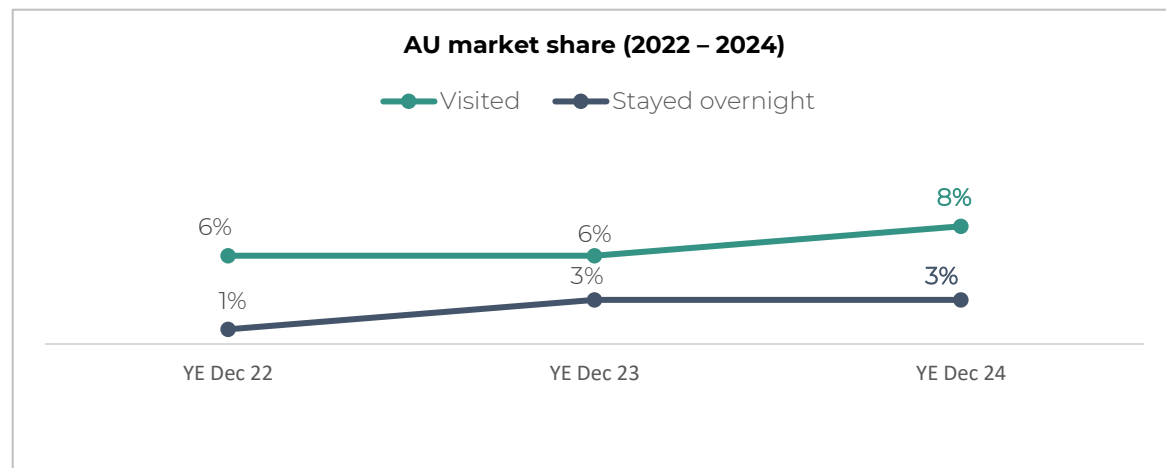
▲ / ▼ Significantly higher or lower than total sample at 95% confidence

TOURISM MARKET SHARE

In the past 12 months, where (if anywhere) have you travelled?



Base: Total Sample (YE Dec 24) - AU Travellers Visited NZ in Past 12 Months (n=630)



RECENT VISITOR PROFILE

In the past 12 months, where (if anywhere) have you travelled?



Region of Residence	Total Sample	Visited Central Otago (past 12 months)	
Australian Capital Territory	2%	0%	▼
New South Wales	32%	47%	▲
Northern Territory	1%	0%	▼
Queensland	20%	18%	
South Australia	7%	2%	▼
Tasmania	3%	0%	▼
Victoria	25%	27%	
Western Australia	10%	6%	

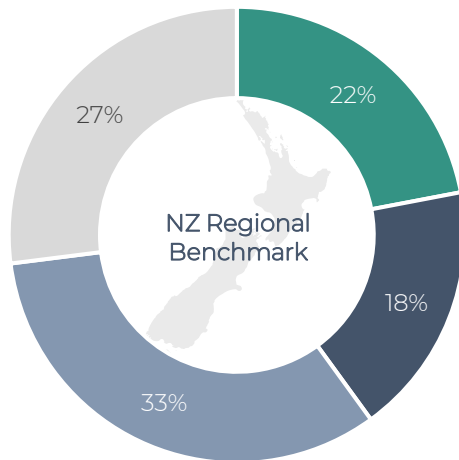
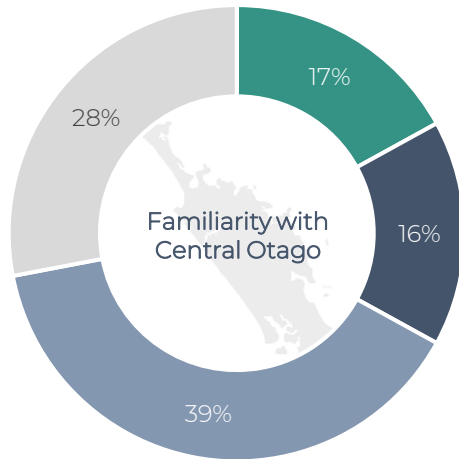
Age	Total Sample	Visited Central Otago past 12 months	
18-19 years	3%	0%	▼
20-29 years	17%	22%	
30-39 years	19%	24%	
40-49 years	16%	10%	
50-59 years	16%	8%	▼
60-69 years	14%	18%	
70+ years	15%	16%	

Household Composition	Total Sample	Visited Central Otago past 12 months	
My husband, wife or partner	59%	57%	
My mother and/or father	6%	4%	
My children aged under 5	11%	14%	
My children aged 5 to 14	18%	27%	
My children aged 15 or older	15%	12%	
Other family/relatives	8%	2%	
Other person(s)	6%	2%	
None of the above – I live alone	17%	22%	

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

FAMILIARITY

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



- Have visited (ever)
- Have never visited but have some ideas about what you can do there
- Have never visited and don't know much about what you can do there
- Have never heard of

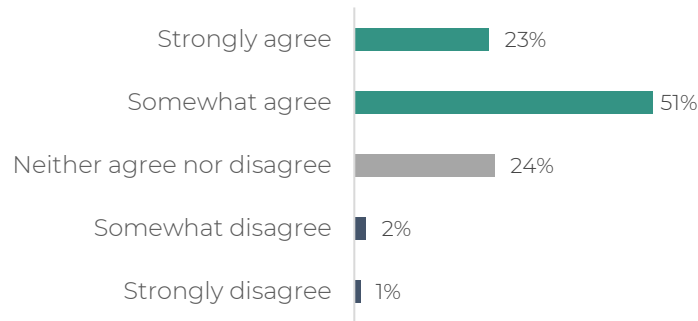


POSITIONING

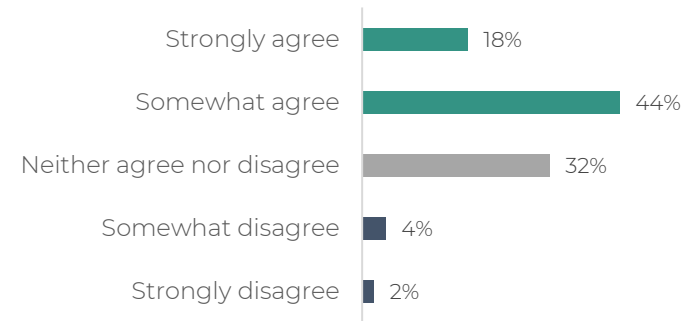
To what extent do you agree or disagree with each of the following statements?



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

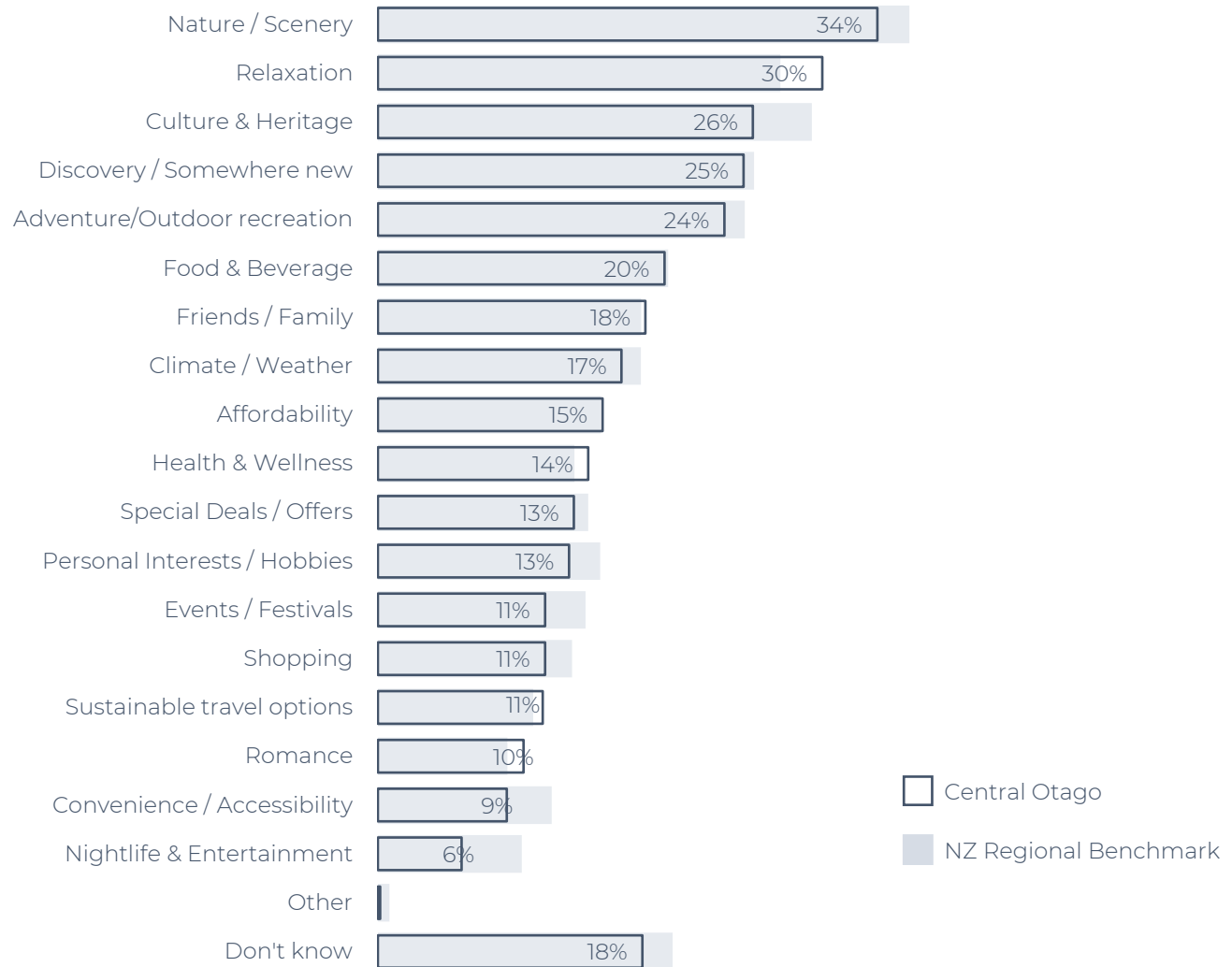


	YE Dec 22	YE Dec 23	YE Dec 24
Strongly agree	23%	23%	23%
Somewhat agree	47%	50%	51%
Neither agree nor disagree	27%	25%	24%
Somewhat disagree	2%	2%	2%
Strongly disagree	1%	0%	1%
Base: Heard of Central Otago n=	1224	1821	1899

	YE Dec 22	YE Dec 23	YE Dec 24
Strongly agree	17%	17%	18%
Somewhat agree	42%	42%	44%
Neither agree nor disagree	34%	35%	32%
Somewhat disagree	4%	4%	4%
Strongly disagree	2%	2%	2%
Base: Heard of Central Otago n=	1224	1821	1899

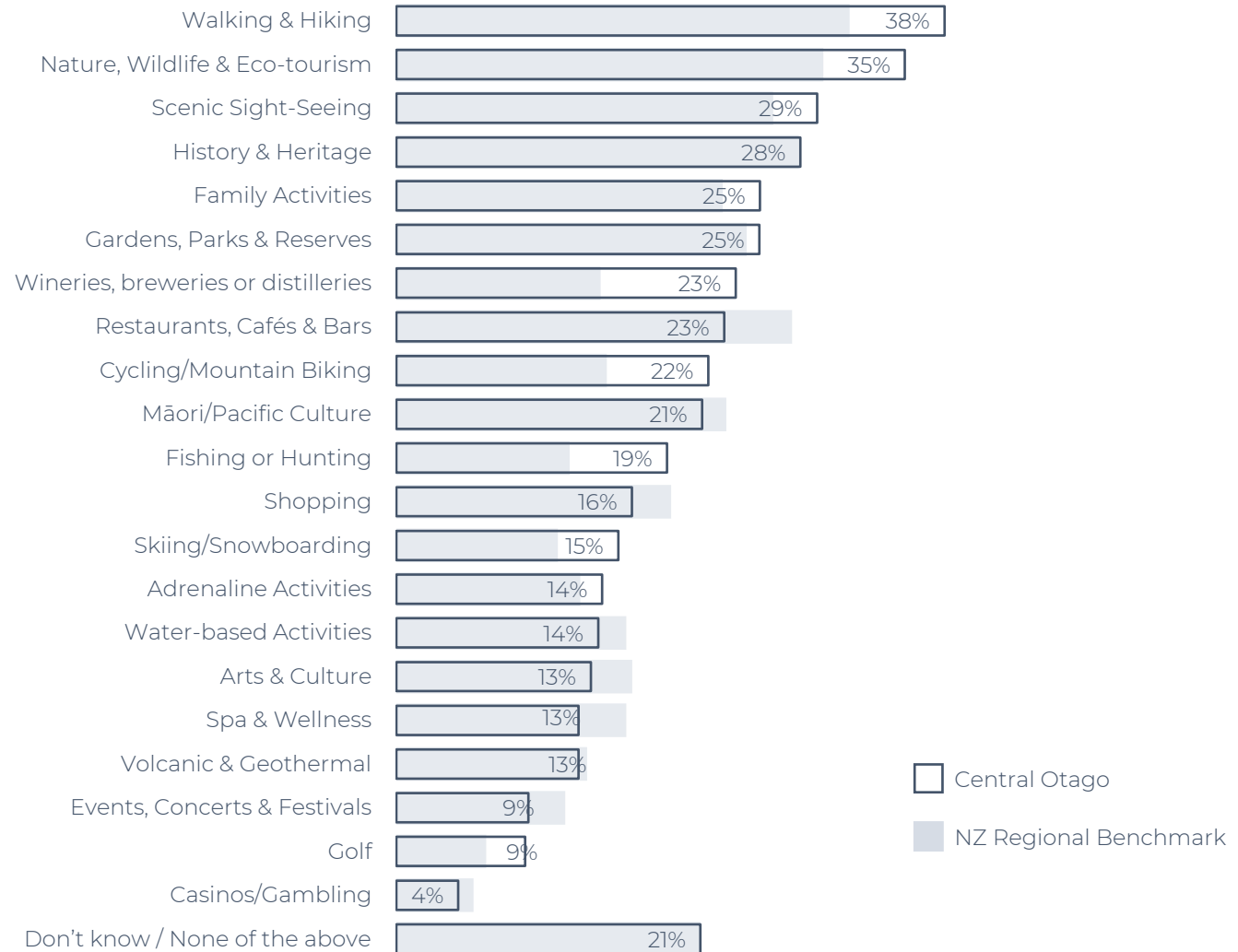
DESTINATION DRIVERS

Why might someone choose to visit Central Otago instead of another New Zealand destination?



ACTIVITIES / EXPERIENCES

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



ACTIVITIES / EXPERIENCES

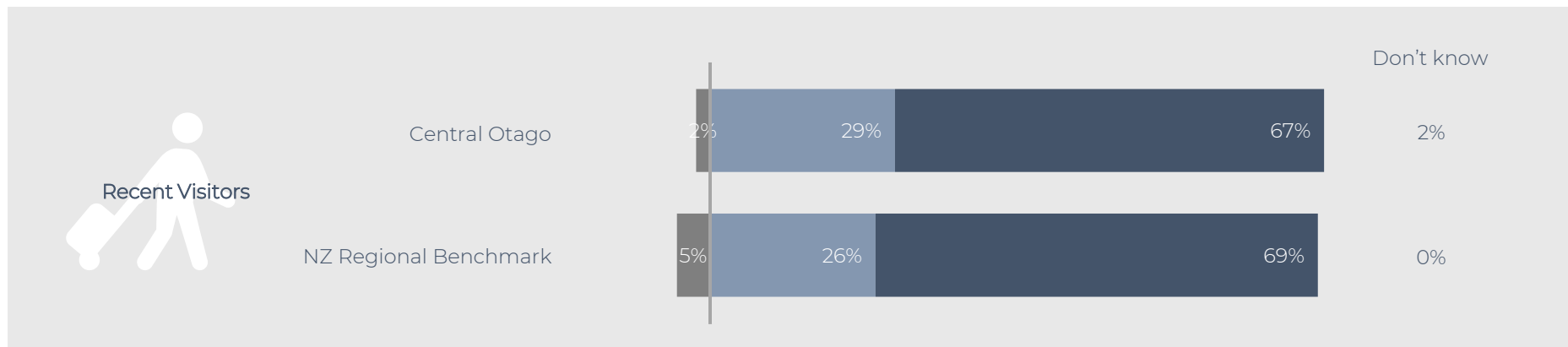
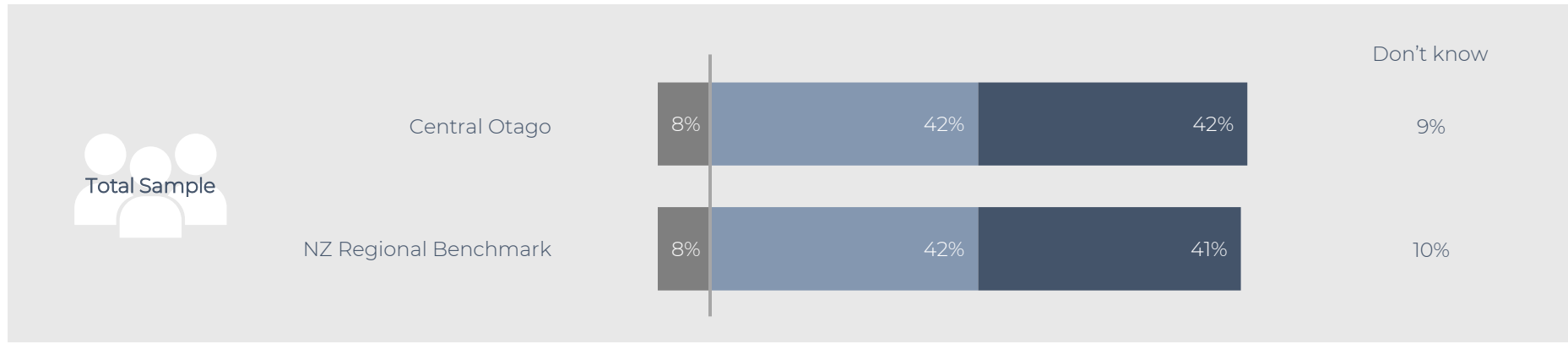
Which, if any, of the following activities or experiences do you associate with Central Otago?



	YE Dec 22	YE Dec 23	YE Dec 24
Walking & Hiking	31%	36%	38%
Nature, Wildlife & Eco-tourism	31%	33%	35%
Scenic Sight-Seeing	23%	27%	29%
History & Heritage	23%	26%	28%
Family Activities	21%	21%	25%
Gardens, Parks & Reserves	21%	23%	25%
Wineries, breweries or distilleries*	-	20%	23%
Restaurants, Cafés & Bars	19%	21%	23%
Cycling/Mountain Biking	19%	19%	22%
Māori/Pacific Culture	19%	18%	21%
Fishing or Hunting*	-	18%	19%
Shopping	15%	14%	16%
Skiing/Snowboarding	11%	12%	15%
Adrenaline Activities	12%	14%	14%
Water-based Activities	10%	11%	14%
Arts & Culture	14%	13%	13%
Spa & Wellness	10%	12%	13%
Volcanic & Geothermal	12%	12%	13%
Events, Concerts & Festivals	8%	9%	9%
Golf*	-	8%	9%
Casinos/Gambling	5%	5%	4%
Don't know/None of the above	26%	22%	20%
Base: Module sample (n=)	1252	1863	1899

DESTINATION APPEAL

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



Not very appealing / Not at all appealing
 Somewhat appealing
 Highly appealing

DESTINATION APPEAL

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



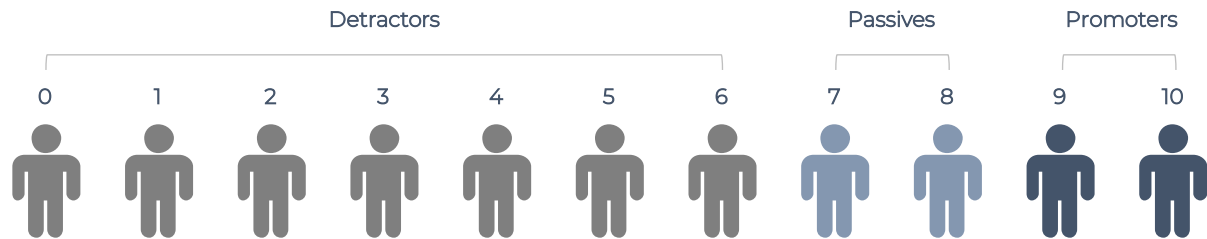
	YE Dec 22	YE Dec 23	YE Dec 24
Highly Appealing	37%	38%	42%
Somewhat Appealing	45%	45%	42%
Not very Appealing	6%	6%	6%
Not at all Appealing	1%	1%	2%
Don't know/NA	10%	10%	9%
Base: Heard of Central Otago n=	2401	2572	2621

NET PROMOTOR SCORE (NPS)

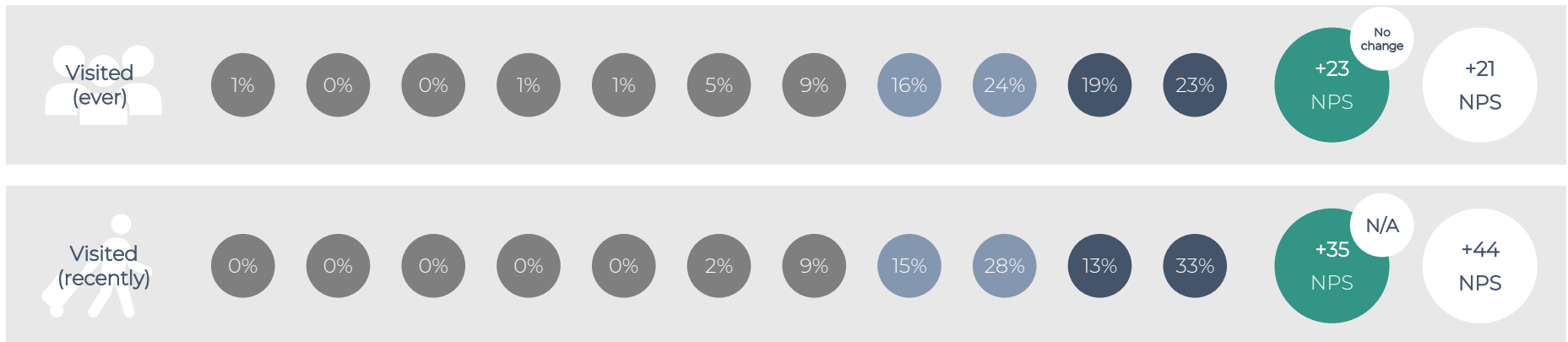
How likely are you to recommend Central Otago as a travel destination to a friend, family member, or colleague?



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 (or destination). A 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.



NZ Regional Benchmark

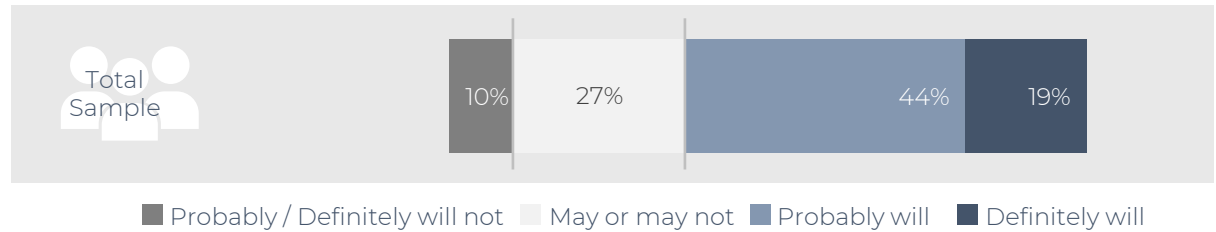


PROPENSITY TO VISIT

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



63% of Australian travellers who intend to visit New Zealand in the next 12 months intend to visit Central Otago



Base: Total Sample - AU Travellers Intend to Visit NZ in Next 12 Months Heard of Central Otago (n=1194)

	YE Dec 22	YE Dec 23	YE Dec 24
Definitely will	14%	13%	19%
Probably will	30%	31%	44%
May or may not	43%	42%	27%
Probably / Definitely will not	13%	14%	10%
Base: (n=)	1794	1950	1194

PROSPECTIVE VISITOR PROFILE

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



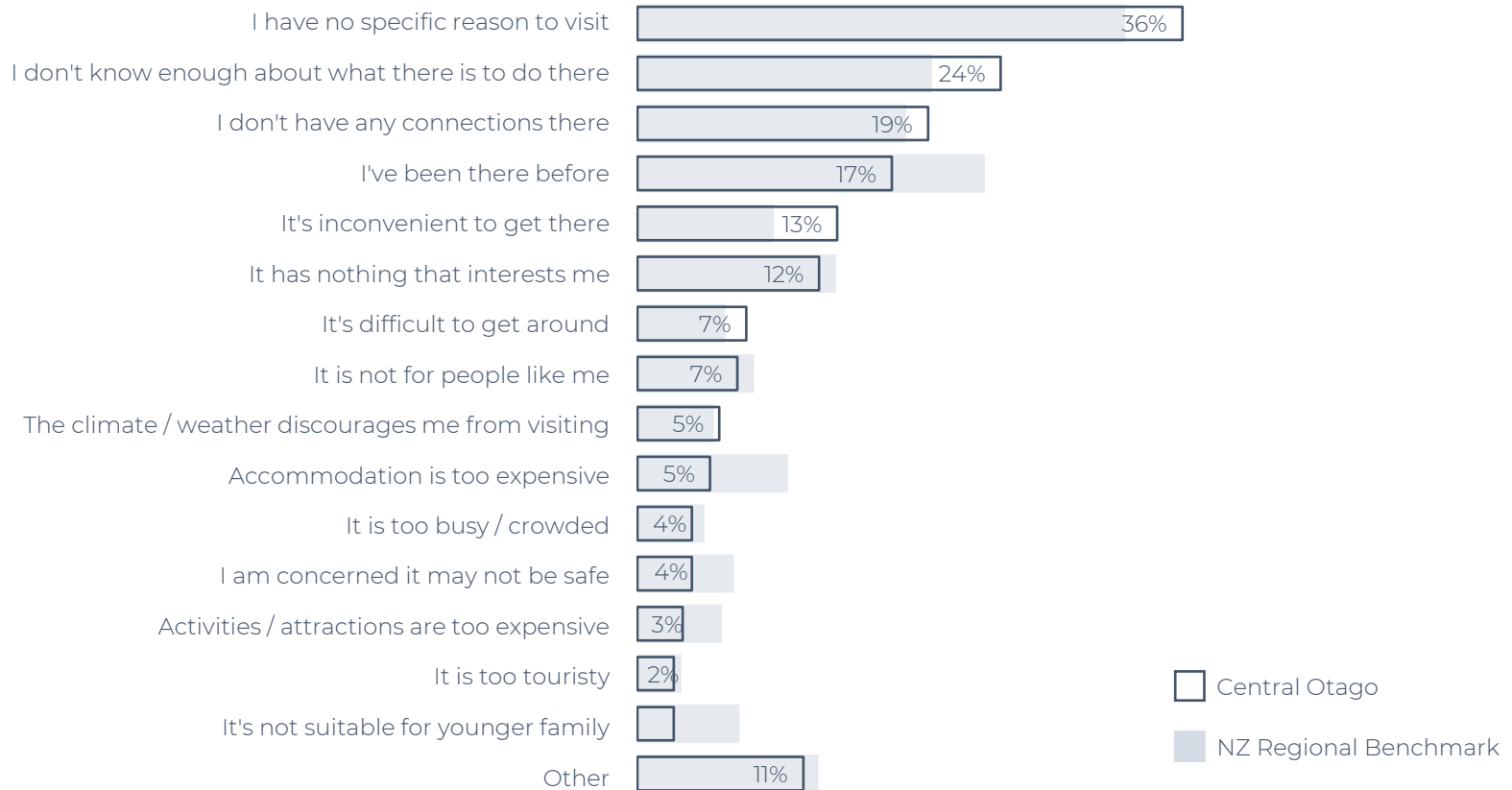
	Total Sample	Prospective Visitors
Region of Residence		
Australian Capital Territory	2%	4%
New South Wales	32%	34%
Northern Territory	1%	1%
Queensland	20%	17%
South Australia	7%	7%
Tasmania	3%	2%
Victoria	25%	28%
Western Australia	10%	8%

	Total Sample	Prospective Visitors
Age		
18-19 years	3%	2%
20-29 years	17%	24% ▲
30-39 years	19%	34% ▲
40-49 years	16%	17%
50-59 years	16%	11% ▼
60-69 years	14%	6% ▼
70+ years	15%	6% ▼
Household Composition		
My husband, wife or partner	59%	59%
My mother and/or father	6%	5%
My children aged under 5	11%	20% ▲
My children aged 5 to 14	18%	29% ▲
My children aged 15 or older	15%	14%
Other family/relatives	8%	8%
Other person(s)	6%	3% ▼
None of the above – I live alone	17%	12% ▼

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

BARRIERS TO VISITING

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



CONVERTING AWARENESS TO VISITATION

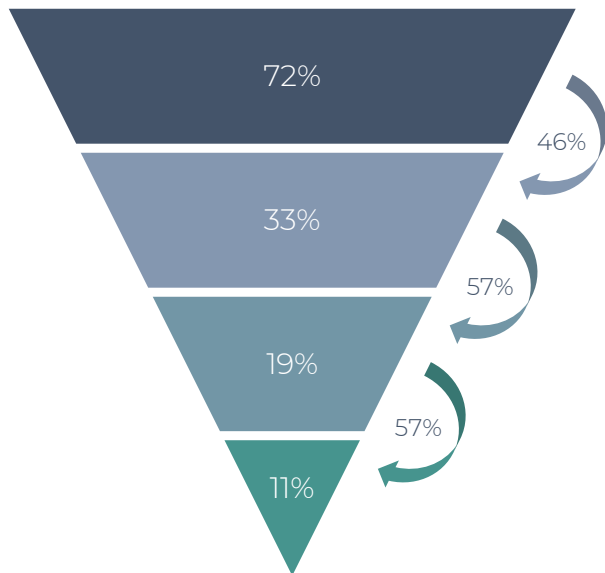


The funnel metric below illustrates the path to purchase, from awareness to likelihood of future visits. It measures: awareness of Central Otago, knowledge of the region, appeal as a destination, and the likelihood of visiting. Seven in ten (72%) New Zealand travellers have heard of Central Otago. As we move down the funnel, each stage introduces a new measure. The 11% at the bottom represents travellers who:

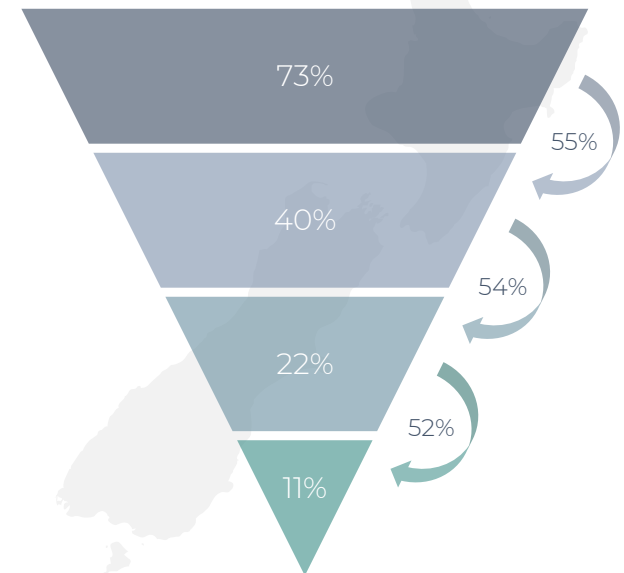
- Have heard of Central Otago
- Are familiar with Central Otago (have either visited or have some ideas about what there is to do there)
- Rate Central Otago as a highly appealing destination
- Intend to visit Central Otago within the next 12 months

The smaller numbers on the right indicate conversion between stages.

CENTRAL OTAGO



NZ REGIONAL BENCHMARK



CONVERTING AWARENESS TO VISITATION



	YE Dec 22	YE Dec 23	YE Dec 24
AWARENESS Have heard of Central Otago	64%	70%	72%
FAMILIARITY Have either visited Central Otago or have some ideas about what there is to do there	44%	44%	46%
APPEAL Rate Central Otago as a highly appealing destination	53%	54%	57%
PROPENSITY TO VISIT Intend to visit Central Otago within next 12 months (probably / definitely will visit)	9%	10%	11%

A woman wearing a light-colored hat and a white top is seen from behind, standing on a wooden suspension bridge. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent blue filter. A large white circle is positioned on the left side of the image, containing the text 'TRAVELLER PERSONAS'.

TRAVELLER PERSONAS

PERSONAS DESCRIPTION



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.



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.



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

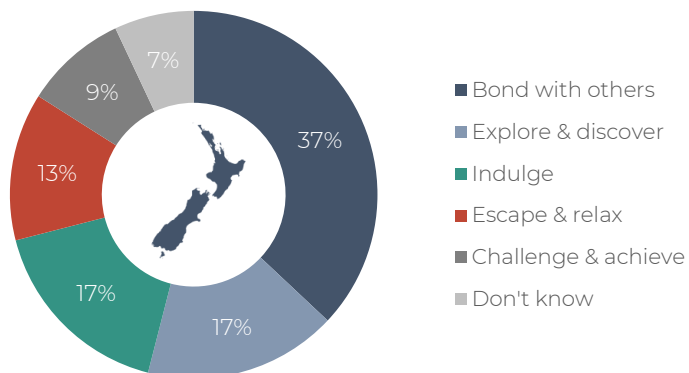
With my work and other commitments, it's difficult to find time to get away. Travel gives me a chance to escape from the routine and pressures of everyday life to relax and recharge.

DOMESTIC VS. AUSTRALIAN TRAVELLERS

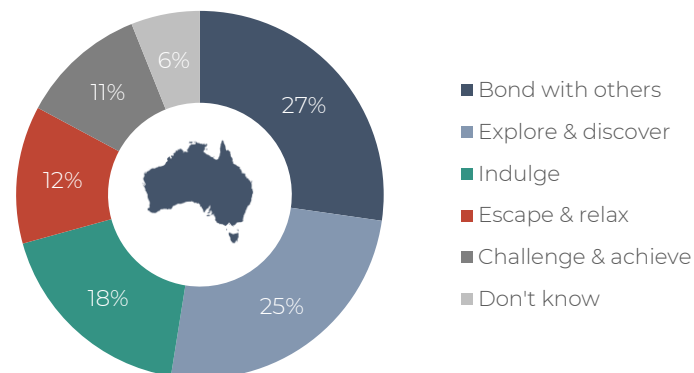


Which one of the following best describes you and your views on travel and holidays?

NEW ZEALAND



AUSTRALIA



	YE Dec 2022	YE Dec 2023	YE Dec 2024
Bond with others	37%	37%	37%
Explore & discover	17%	18%	17%
Indulge	17%	16%	17%
Escape & relax	14%	14%	13%
Challenge & achieve	9%	9%	9%
Don't know	7%	6%	7%
Base: Total Sample (excl. residents) n=	3759	3753	3627

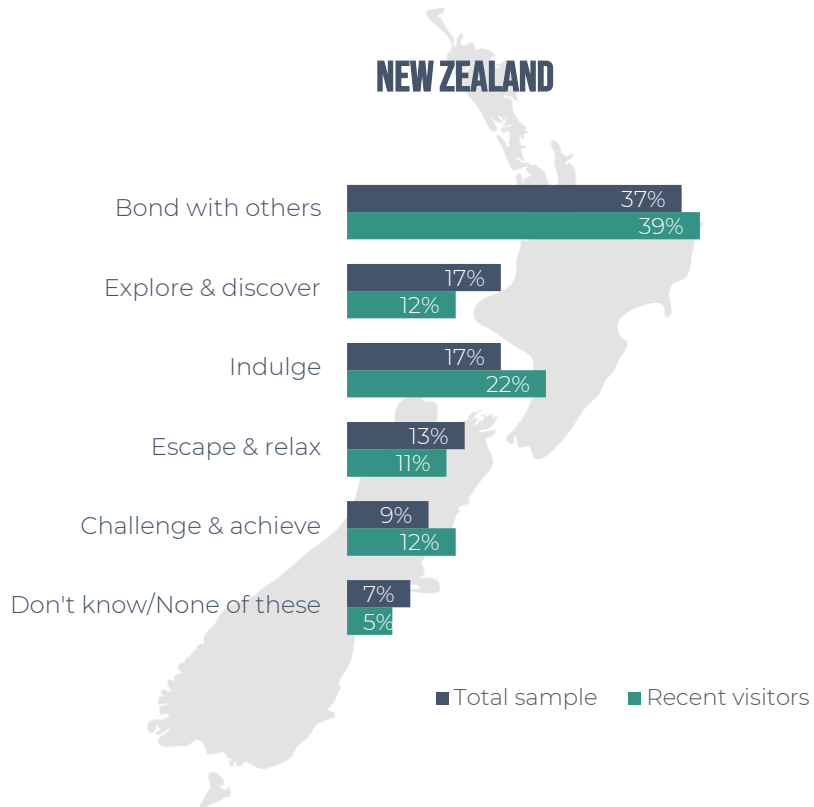
	YE Dec 2022	YE Dec 2023	YE Dec 2024
Bond with others	28%	27%	27%
Explore & discover	22%	24%	25%
Indulge	21%	18%	18%
Escape & relax	11%	13%	12%
Challenge & achieve	12%	11%	11%
Don't know	6%	6%	6%
Base: Total Sample n=	3741	3697	3633

DOMESTIC VS. AUSTRALIAN TRAVELLERS



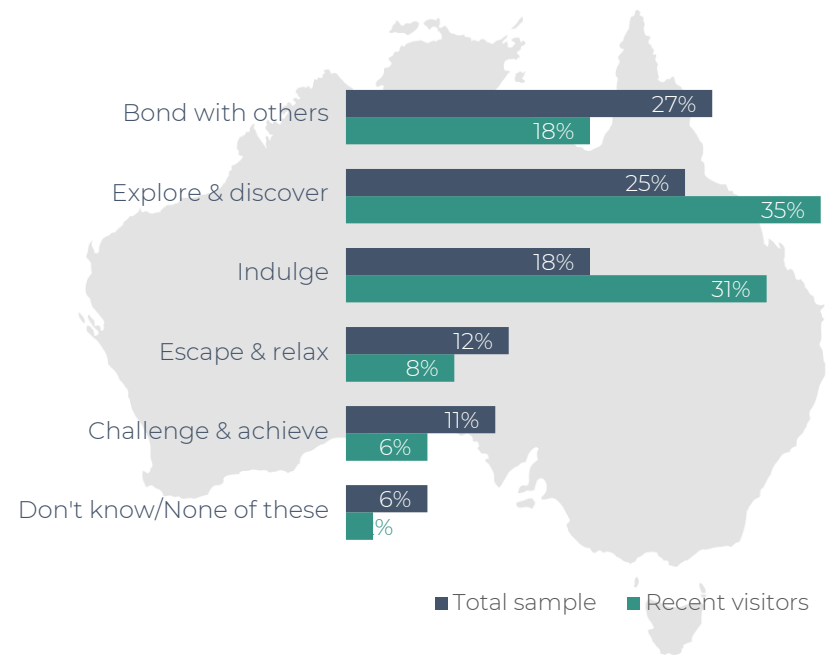
Which one of the following best describes you and your views on travel and holidays?

NEW ZEALAND



Base: Total sample, excluding residents (n=3627); Visited Central Otago P12M (n=235)

AUSTRALIA



Base: Total sample (n= 3633); Visited Central Otago P12M (n=49)

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	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
I have visited Central Otago	34%	33%	32%	42%	29%	34%
I have never visited, but do have some ideas about what you can do there	15%	18%	18%	16%	15%	16%
I have never visited, and don't know much about what you can do there	36%	33%	34%	30%	39%	35%
I have never heard of Central Otago	16%	16%	16%	12%	17%	16%
Base: Total sample (excluding residents) n=	2337	715	1547	1272	912	7246

Appeal	Bond with others	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
Highly appealing	38%	43%	44%	46%	35%	40%
Somewhat appealing	41%	42%	42%	40%	44%	41%
Not very appealing	11%	8%	7%	7%	11%	9%
Not at all appealing	2%	2%	2%	3%	2%	3%
Don't know / NA	8%	5%	6%	4%	6%	7%
Base: Total sample (excluding residents, heard of Central Otago) n=	1969	598	1302	1118	756	6090

POSITIONING

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



A HOLIDAY IN CENTRAL OTAGO IS AN OPPORTUNITY TO SLOW DOWN AND RELAX

	Bond with others	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
Strongly agree	24%	22%	27%	30%	22%	24%
Somewhat agree	50%	55%	50%	46%	52%	50%
Neither agree nor disagree	23%	18%	21%	21%	23%	23%
Somewhat disagree	2%	4%	2%	2%	3%	2%
Strongly disagree	1%	1%	1%	1%	1%	1%
Base: Module sample – Heard of Central Otago (excl. residents) n=	1328	416	913	763	524	4177

CENTRAL OTAGO IS AN IDEAL PLACE TO RECONNECT WITH FRIENDS AND FAMILY

	Bond with others	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
Strongly agree	17%	16%	20%	22%	15%	18%
Somewhat agree	42%	49%	44%	39%	42%	42%
Neither agree nor disagree	33%	28%	31%	30%	35%	33%
Somewhat disagree	6%	5%	3%	6%	5%	5%
Strongly disagree	2%	2%	1%	2%	3%	3%
Base: Module sample – Heard of Central Otago (excl. residents) n=	1328	416	913	763	524	4177

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	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
Walking & Hiking	47%	43%	48%	46%	46%	46%
Nature, Wildlife & Eco-tourism	35%	36%	41%	37%	39%	37%
Scenic Sight-Seeing	37%	30%	35%	34%	36%	34%
History & Heritage	33%	31%	37%	33%	30%	33%
Wineries, breweries or distilleries	35%	29%	30%	37%	30%	32%
Cycling/Mountain Biking	32%	30%	32%	33%	32%	32%
Restaurants, Cafés & Bars	33%	28%	28%	31%	26%	29%
Family Activities	31%	27%	29%	27%	28%	28%
Gardens, Parks & Reserves	26%	28%	28%	25%	25%	26%
Fishing or Hunting	26%	24%	26%	26%	23%	25%
Skiing/Snowboarding	20%	23%	22%	19%	23%	21%
Adrenaline Activities	19%	21%	19%	18%	18%	19%
Water-based Activities	18%	15%	17%	17%	16%	16%
Shopping	14%	19%	16%	15%	13%	15%
Arts & Culture	13%	14%	14%	13%	13%	13%
Māori/Pacific Culture	11%	16%	16%	12%	11%	12%
Spa & Wellness	11%	14%	13%	13%	12%	12%
Golf	12%	14%	13%	12%	11%	12%
Events, Concerts & Festivals	12%	12%	13%	12%	12%	12%
Volcanic & Geothermal	6%	11%	9%	8%	8%	8%
Casinos/Gambling	3%	6%	4%	4%	4%	4%
Don't know/None of the above	15%	10%	15%	12%	17%	16%
Base: Module sample - heard of Central Otago, excl. residents n=	1328	416	913	763	524	4177

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	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
	10 (Extremely likely)	22%	23%	26%	24%	20%	23%
	9	17%	19%	17%	17%	14%	17%
Passive	8	21%	27%	22%	25%	21%	23%
	7	16%	14%	16%	15%	21%	16%
Detractors	6	8%	9%	9%	7%	10%	9%
	5	9%	3%	6%	6%	8%	7%
	4	2%	2%	2%	1%	1%	2%
	3	2%	2%	1%	0%	3%	1%
	2	0%	0%	0%	1%	1%	1%
	1	1%	0%	0%	1%	0%	0%
	0 (Not at all likely)	3%	0%	1%	2%	2%	2%
NPS		+15	+16	+24	+23	+10	+18
	Base: Visited Central Otago previously n=	796	237	495	529	265	2452

PROPENSITY TO VISIT CENTRAL OTAGO

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



	Bond with others	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
Definitely will	8%	12%	11%	13%	9%	10%
Probably will	21%	31%	24%	25%	19%	22%
May or may not	30%	34%	35%	31%	34%	32%
Probably will not	29%	17%	23%	20%	26%	25%
Definitely will not	12%	6%	7%	10%	12%	11%
Base: Intend to travel around/to New Zealand in next 12 months and heard of Central Otago n=	1856	566	1215	1056	699	5700

BARRIERS TO VISITING



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

	Bond with others	Challenge & achieve	Explore & discover	Indulge	Escape & relax	Total sample
I have no specific reason to visit	52%	40%	47%	46%	55%	51%
I don't have any connections there	35%	15%	29%	23%	32%	30%
It's inconvenient to get there	28%	30%	27%	27%	31%	28%
I don't know enough about what there is to do there	23%	21%	19%	16%	23%	21%
I've been there before	16%	18%	22%	33%	13%	20%
It has nothing that interests me	18%	19%	19%	22%	13%	18%
Accommodation is too expensive	13%	19%	12%	7%	16%	13%
Activities / attractions are too expensive	7%	12%	9%	4%	8%	8%
It is not for people like me	7%	4%	7%	5%	7%	7%
The climate / weather discourages me from visiting	6%	11%	5%	4%	3%	6%
It's difficult to get around	4%	15%	6%	8%	6%	6%
It is too touristy	2%	4%	5%	1%	1%	3%
It is too busy / crowded	2%	5%	3%	2%	2%	3%
It's not suitable for younger family	2%	7%	0%	3%	4%	2%
I am concerned it may not be safe	1%	5%	2%	3%	1%	2%
Other	5%	1%	9%	10%	11%	8%
Base: Intend to Travel Domestically in Next 12 Months, Heard of Central Otago but Unlikely to Visit n=	483	73	212	192	160	1189

