

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 JUNE 2025

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 July 2024 – June 2025, 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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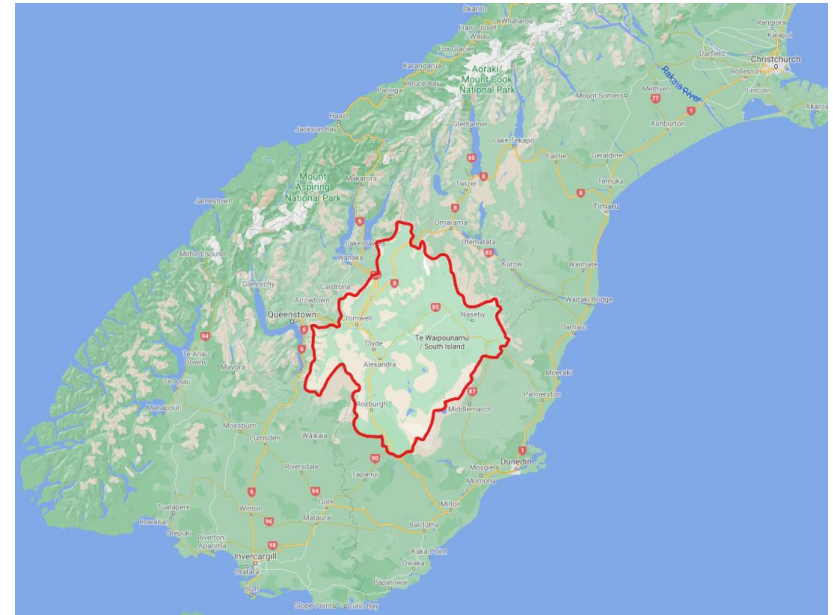
MARKET PERCEPTIONS

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 JUNE 2025

DOMESTIC TRAVEL MARKET



- Seven in ten (71%) New Zealanders have travelled within New Zealand in the last 12 months, with 7% of domestic travellers visiting Central Otago. This percentage has declined from the high of 10% recorded in the two years to June 2023 (during which domestic tourism was heightened post-COVID).
- Almost two-thirds of Central Otago's recent visitors (65%) originated from South Island towns or cities, with Canterbury being the largest domestic source market (25% of visitors in the last 12 months). However, North Island markets account for more than 60% of prospective visitors (those who intend to visit in the next 12 months).
- Central Otago attracts a broad range of domestic visitors by age and household composition although older New Zealanders (aged 70+) are especially prominent in the region's domestic visitor base.
- 34% of New Zealand travellers who intend to travel domestically in the next 12 months say they are likely to visit Central Otago (i.e. definitely or probably will visit).
- When thinking of Central Otago, beautiful scenery, wine and fruit are top-of-mind for the domestic market.
- Central Otago's natural scenery, adventure/outdoor recreation, and opportunities for relaxation are both the main drawcards for domestic travellers, and points of differentiation for the region. Central Otago is also associated with a wide range of activities, including walking/hiking, wineries, sight-seeing, cycling, history & heritage and nature.
- 75% of domestic travellers agree that a holiday in Central Otago is an opportunity to slow down and relax. 58% agree that Central Otago is an ideal place to reconnect with friends and family. Wineries/breweries/distilleries and cycling/mountain biking are clear points of differentiation for the region.
- Central Otago's Net Promoter Score (NPS) for the year to June 2025 is +18, up three points on the prior year and well above the regional benchmark of -8. Amongst recent domestic visitors, Central Otago's NPS increases to +47, well above the regional benchmark of +11 and reflective of the very positive experience that visitors have in the region.
- Central Otago is converting awareness into propensity to visit at a rate comparable to the regional benchmark for the domestic travel market. The main barrier to visiting Central Otago remains the perception that people have that there is no specific reason to visit.

CENTRAL OTAGO INSIGHTS: YEAR ENDING JUNE 2025

AUSTRALIAN TRAVEL MARKET



- 12% of Australians who travelled to New Zealand in the past 12 months visited Central Otago on their trip and 6% stayed overnight. Both proportions have increased significantly on the year prior (6% and 2% respectively).
- 26% of the Australian traveller sample in the last 12 months had never heard of Central Otago. A further 37% were aware of Central Otago but did not know much about the region. The combined proportion (63%) is higher than the average for other New Zealand regions and suggests that further opportunity exists to educate the market.
- When those who are aware of the region think of Central Otago, beautiful scenery, mountains, and wine most typically come to mind.
- Walking/hiking, nature and wildlife experiences, scenic sightseeing and history/heritage are the top activities or experiences associated with the region, with walking/hiking and nature and wildlife experiences most clearly differentiating the region.
- 74% of Australian travellers agree that a holiday in Central Otago is an opportunity to slow down and relax and 65% that Central Otago is an ideal place to reconnect with friends and family. Both proportions have increased steadily over time.
- Central Otago's Australian market Net Promoter Score (NPS) is +33, up 9 points on the year to June 2024 and well above the regional benchmark of +22. However, Central Otago's Net Promoter Score has fallen slightly amongst recent visitors (down 3 points from +45 to +42 and now sitting slightly below the comparable regional benchmark).
- More than two thirds (68%) of 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 currently converting awareness into a propensity to visit at a rate comparable to the regional benchmark for the Australian market.



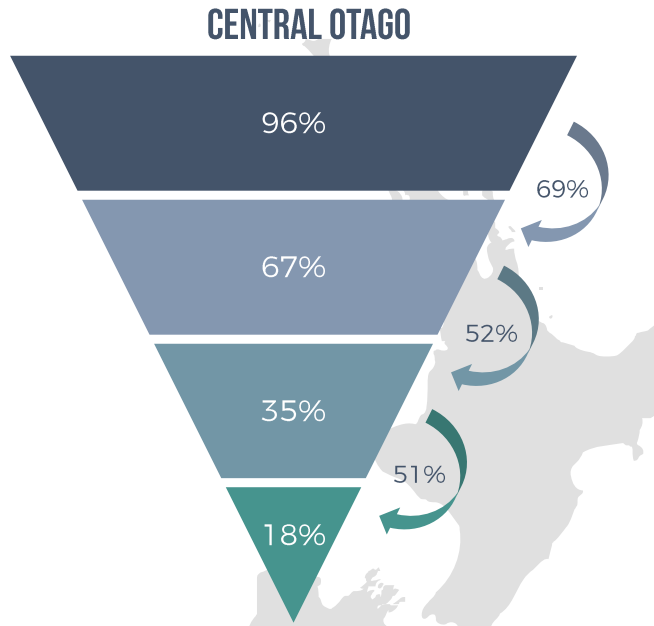
- Five travel personas were developed for Tourism Central Otago and survey responses have been analysed by the five personas. (The five personas are described on page 47. The relative size of these persona segments varies across the New Zealand and Australian travel markets and will also vary over time).
- The 'bond with others' persona currently accounts for the largest share of the market (35% of New Zealand travellers and 26% of the Australian traveller market).
- While the 'bond with others' persona is also prominent amongst Central Otago's domestic visitors, 'indulge' travellers make up 25% of recent domestic travellers to the region. The 'indulge' segment is also prominent amongst recent Australian travellers to Central Otago, along with the 'explore and discover' persona.
- The 'indulge' and 'explore and discover' personas give the highest Net Promotor Scores for Central Otago, at +28 and +26 respectively. The region's NPS is also higher than average amongst those in the 'challenge and achieve' segment.
- Those in the 'indulge' persona most strongly associate Central Otago with wineries, breweries and distilleries, while for the 'explore & discover' persona walking and hiking; nature, wildlife and eco-tourism; and history and heritage are top of mind.
- Those in the 'indulge' segment are most likely to have visited Central Otago and are also most likely to find the region highly appealing. This group is also most 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.
- The 'escape and relax' persona is the least likely group to visit Central Otago in the next 12 months, with 'no reasons to visit' being the most common reason cited.
- The 'escape and relax' persona is the least likely to be familiar with Central Otago and is also the least likely to find the region highly appealing.

A woman wearing a light-colored, wide-brimmed hat and a light-colored, textured sweater is seen from behind, standing on a wooden suspension bridge. The bridge has thick wooden beams 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".

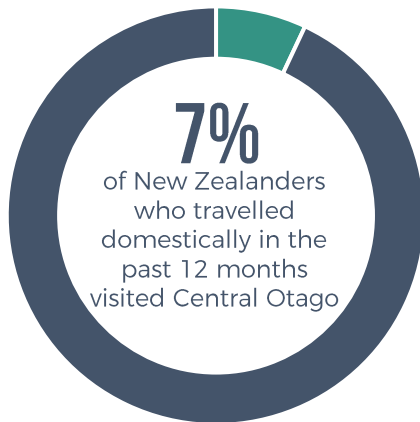
SNAPSHOT

CENTRAL OTAGO SNAPSHOT: YEAR ENDING JUNE 2025

DOMESTIC TRAVEL MARKET



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 (51%)
- Wineries, breweries or distilleries (41%)
- Scenic Sight-Seeing (40%)
- Cycling/Mountain Biking (38%)
- History & Heritage (38%)
- Nature, Wildlife & Eco-tourism (38%)

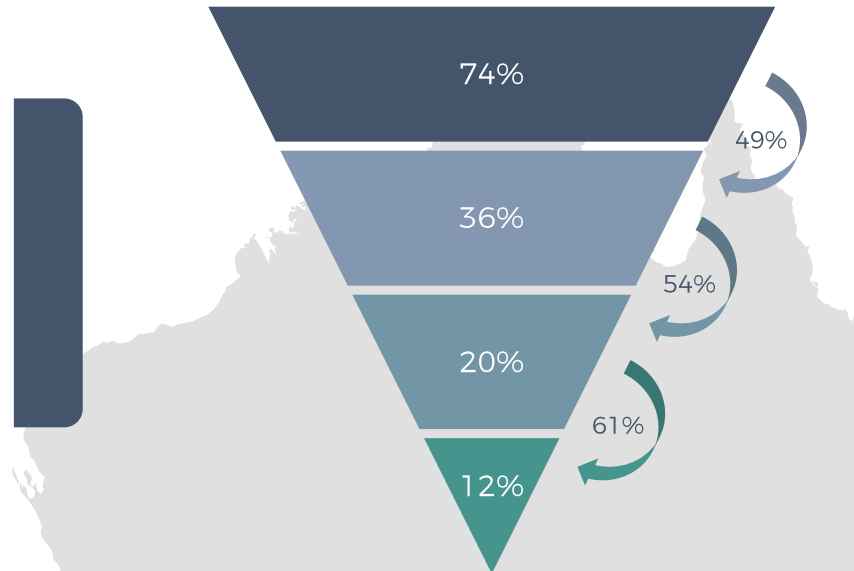


CENTRAL OTAGO SNAPSHOT: YEAR ENDING JUNE 2025

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

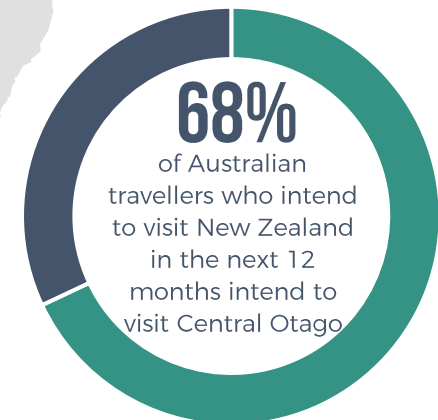
PROPENSITY TO VISIT

Intend to visit Central Otago within next 12 months (probably / definitely will visit)



Australian travellers associate Central Otago with...

- Walking & Hiking (39%)
- Nature, Wildlife & Eco-Tourism (35%)
- Scenic Sightseeing (31%)
- History & Culture (28%)
- Gardens, Parks & Reserves (25%)
- Family Activities (25%)



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 ropes. 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.

**DOMESTIC
TRAVEL MARKET**

CENTRAL OTAGO TOP-OF-MIND PLACES

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

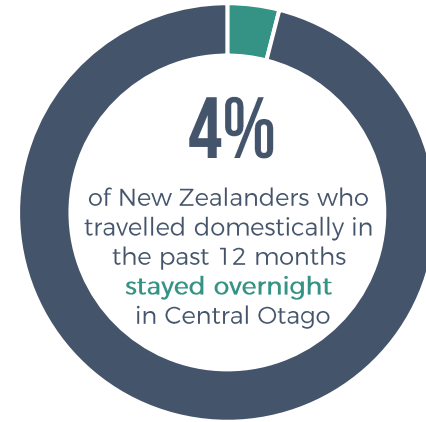


There has been a gradual reduction in the association of Queenstown, Wanaka and Arrowtown with Central Otago since 2022.

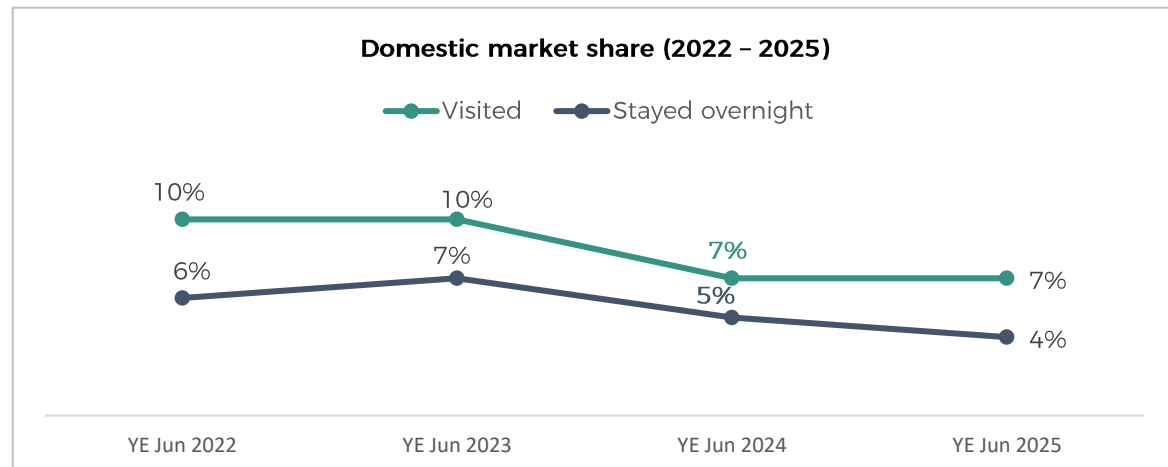
	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Queenstown	53%	51%	48%	48%
Alexandra	40%	39%	39%	40%
Arrowtown	42%	38%	36%	37%
Wānaka	45%	40%	37%	37%
Cromwell & Bannockburn	35%	35%	35%	35%
Clyde	26%	26%	27%	27%
Roxburgh & Teviot	17%	17%	16%	17%
Gibbston Valley	14%	14%	12%	13%
Omarama & Twizel	16%	14%	14%	13%
Ranfurly & Maniototo	12%	12%	12%	12%
Naseby	12%	12%	11%	11%
Hawea	10%	9%	9%	9%
Base: Total sample, excl. residents (n=)	3,765	3,806	3,642	3,622

TOURISM MARKET SHARE

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



Base: Total Sample (YE Jun 25) - NZ Domestic Travellers (travelled within NZ in past 12 months), excl. Central Otago Residents (n=3,213)



RECENT VISITOR PROFILE



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

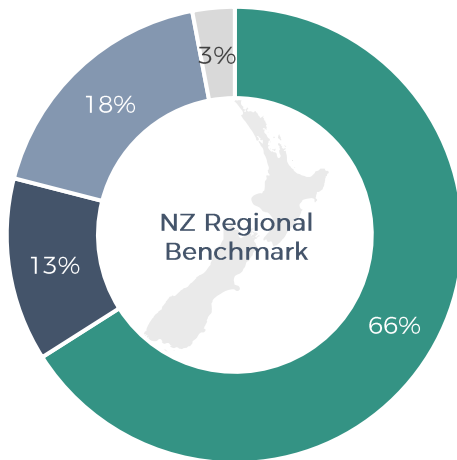
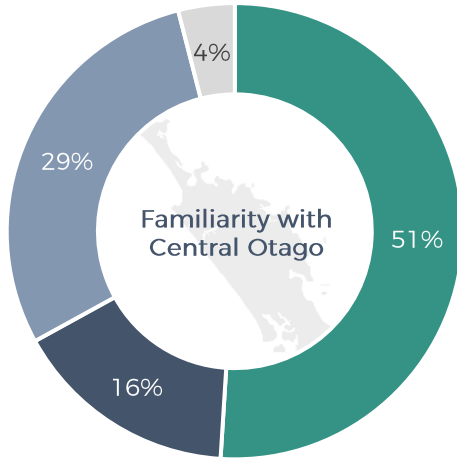
	Total Sample	Recent Visitors
Region of Residence		
Northland	4%	1% ▼
Auckland	34%	16% ▼
Waikato	10%	3% ▼
Bay of Plenty	6%	0% ▼
Tairāwhiti / Gisborne	0%	1%
Hawke's Bay	4%	1% ▼
Taranaki	3%	1% ▼
Manawatū-Whanganui	5%	3% ▼
Wellington (& Wairarapa)	11%	9%
Tasman	1%	0%
Nelson	2%	3%
Marlborough	1%	2%
West Coast	0%	1%
Canterbury	13%	25% ▲
Otago	5%	23% ▲
Southland	2%	12% ▲
North Island (NET)	76%	35% ▼
South Island (NET)	24%	65% ▲

	Total Sample	Recent Visitors
Age		
18-19 years	4%	3%
20-29 years	18%	13% ▼
30-39 years	17%	18%
40-49 years	17%	14%
50-59 years	17%	17%
60-69 years	13%	14%
70+ years	14%	21% ▲
Household Composition		
My husband, wife or partner	59%	67% ▲
My mother and/or father	6%	3% ▼
My children aged under 5	11%	7% ▼
My children aged 5 to 14	17%	16%
My children aged 15 or older	14%	12%
Other family/relatives	10%	8%
Other person(s)	7%	7%
None of the above - I live alone	16%	13%

▲ / ▼ 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

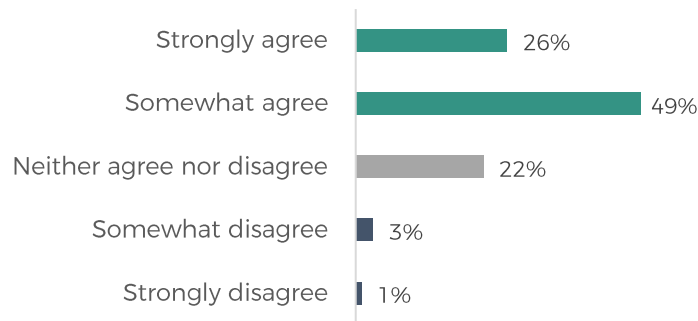


POSITIONING

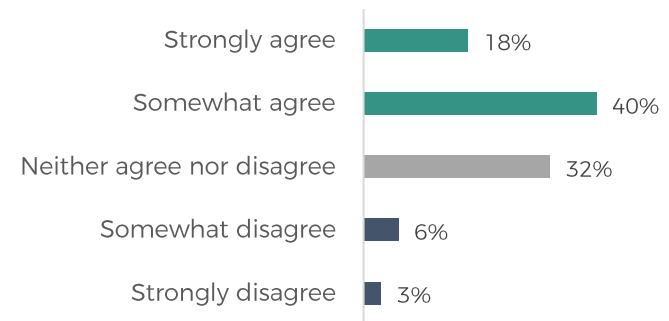
To what extent do you agree or disagree with each of the following statements?



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

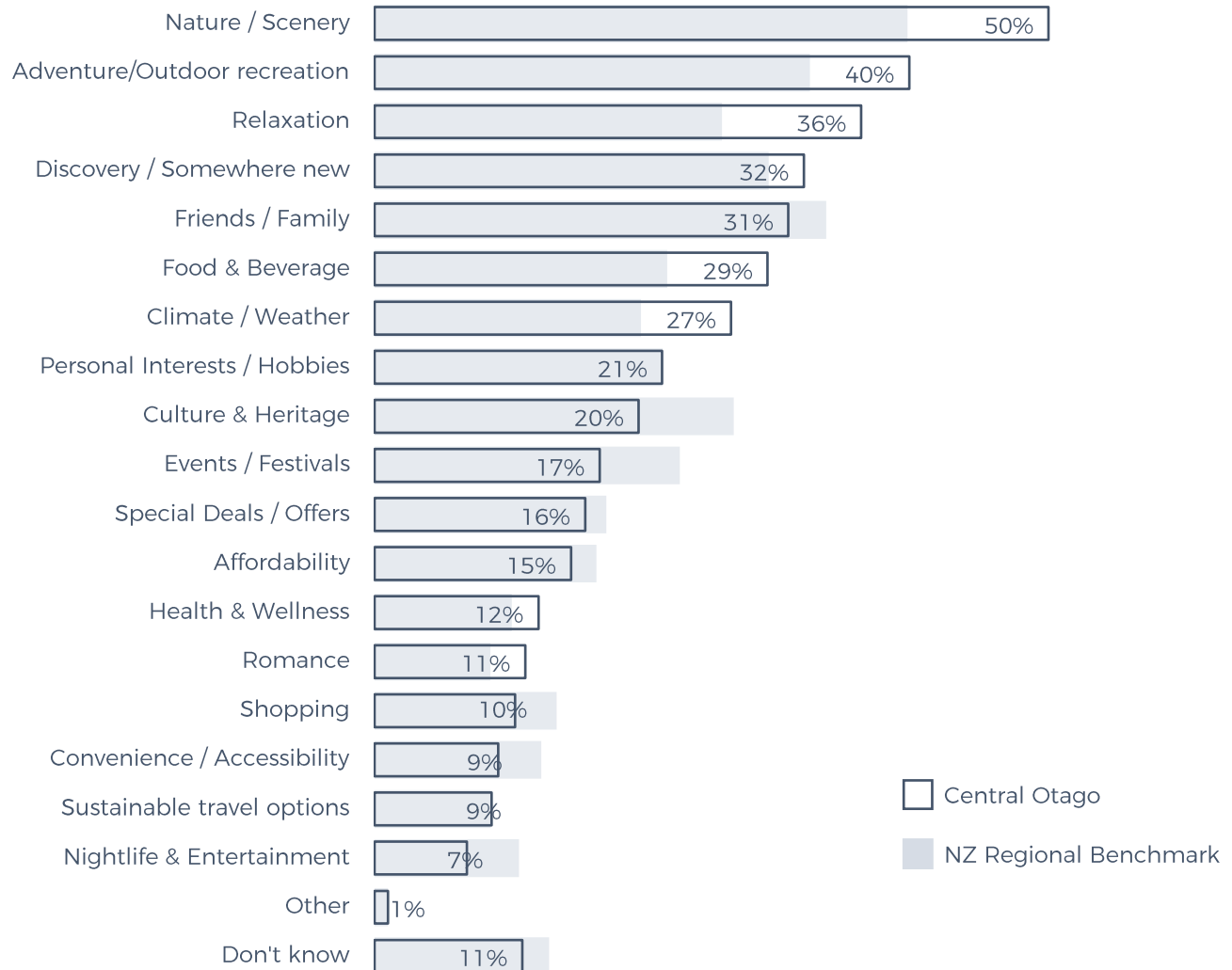


	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Strongly agree	26%	28%	29%	26%
Somewhat agree	45%	46%	47%	49%
Neither agree nor disagree	25%	22%	20%	22%
Somewhat disagree	3%	3%	3%	3%
Strongly disagree	2%	1%	1%	1%
Base: Heard of Central Otago, excluding residents (n=)	1,361	1,808	2,172	2,337

	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Strongly agree	17%	20%	20%	18%
Somewhat agree	34%	36%	37%	40%
Neither agree nor disagree	36%	34%	33%	32%
Somewhat disagree	9%	7%	6%	6%
Strongly disagree	5%	3%	4%	3%
Base: Heard of Central Otago, excluding residents (n=)	1,361	1,808	2,172	2,337

DESTINATION DRIVERS

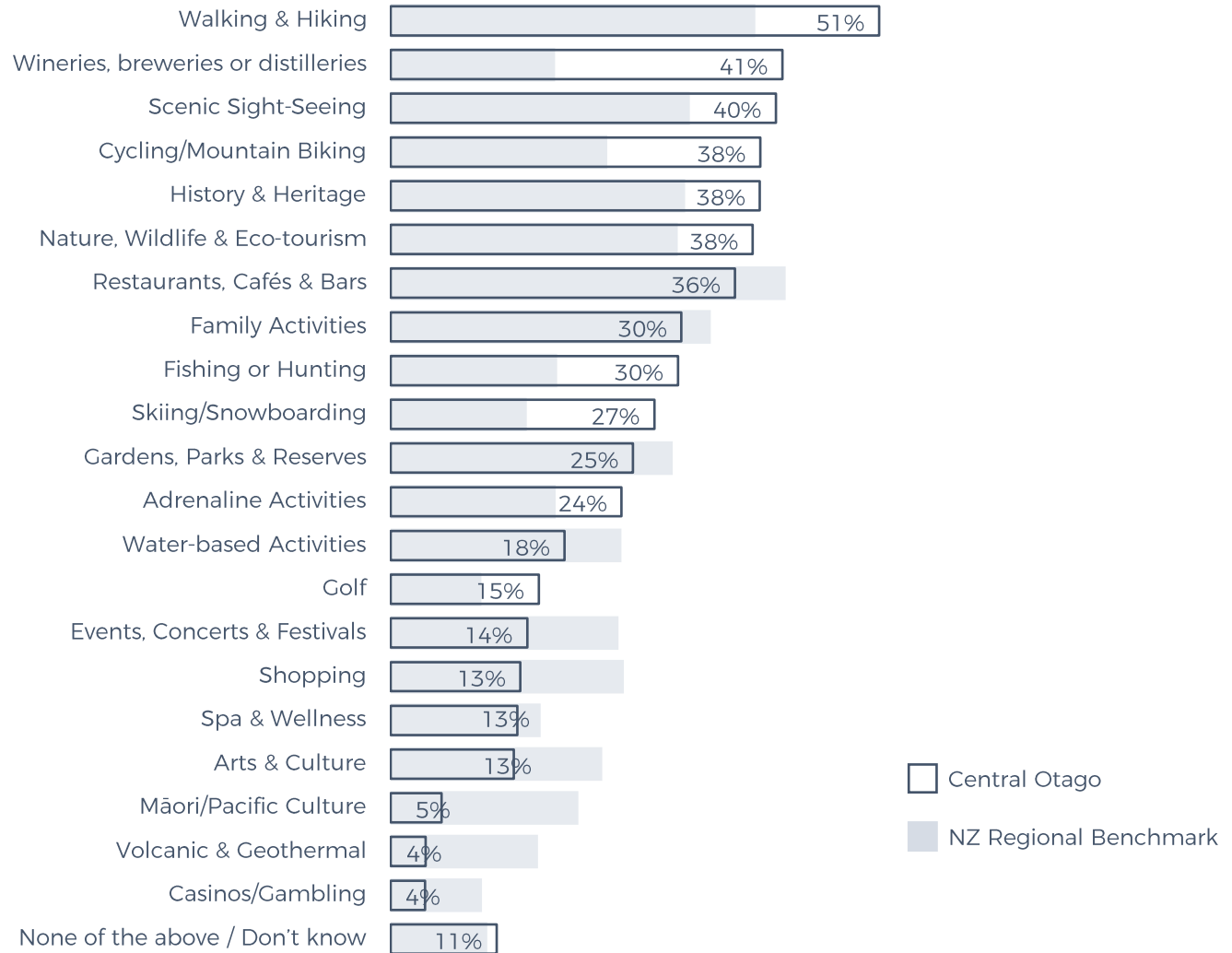
Why might someone choose to visit Central Otago instead of another New Zealand destination?



ACTIVITIES / EXPERIENCES



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



ACTIVITIES / EXPERIENCES

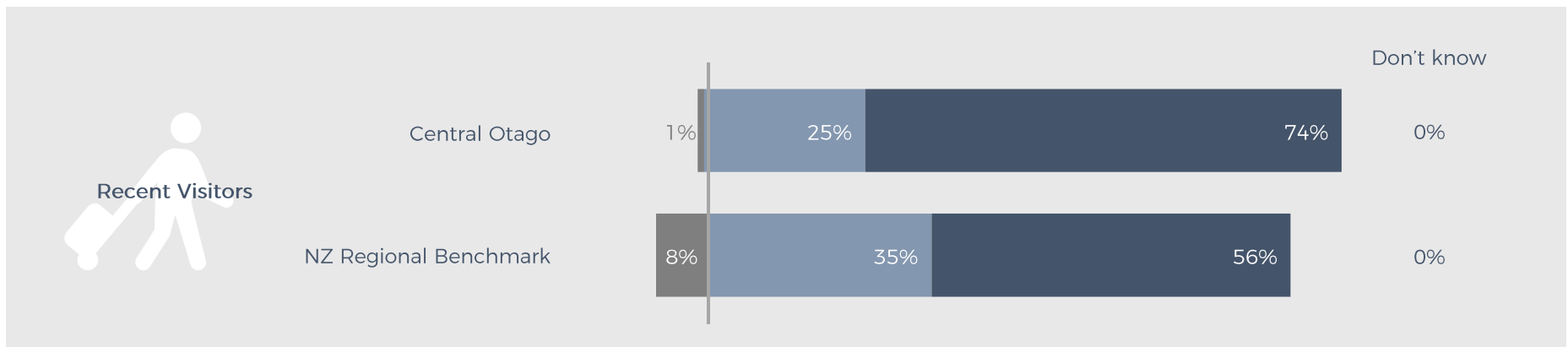
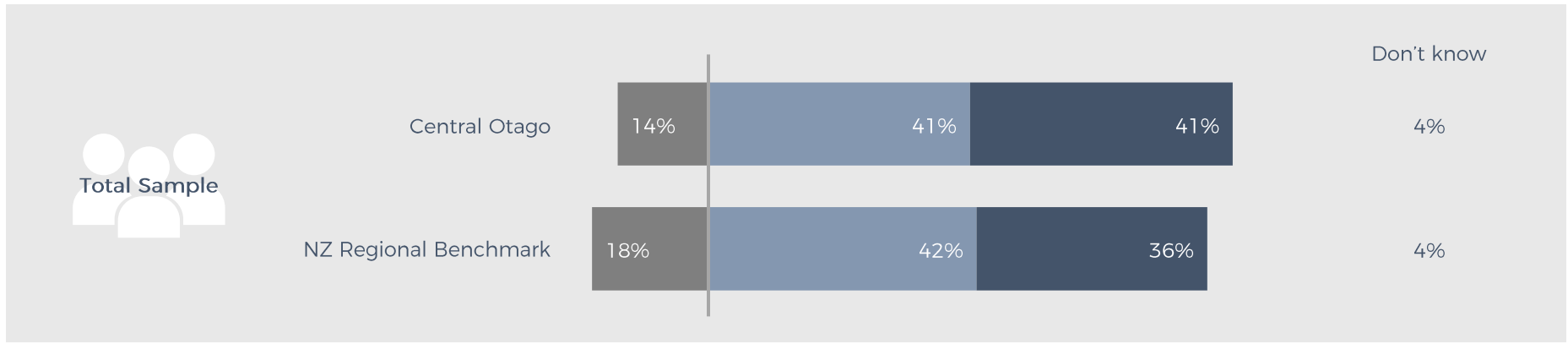
Which, if any, of the following activities or experiences do you associate with Central Otago?



	YE Jun 23	YE Jun 24	YE Jun 25
Walking & Hiking	47%	53%	51%
Wineries, breweries or distilleries	37%	40%	41%
Scenic Sight-Seeing	36%	40%	40%
Cycling/Mountain Biking	36%	39%	38%
History & Heritage	34%	35%	38%
Nature, Wildlife & Eco-tourism	34%	42%	38%
Restaurants, Cafés & Bars	34%	34%	36%
Family Activities	31%	33%	30%
Fishing or Hunting	27%	31%	30%
Skiing/Snowboarding	21%	24%	27%
Gardens, Parks & Reserves	24%	28%	25%
Adrenaline Activities	23%	24%	24%
Water-based Activities	18%	18%	18%
Golf	15%	14%	15%
Events, Concerts & Festivals	14%	14%	14%
Shopping	14%	14%	13%
Spa & Wellness	11%	12%	13%
Arts & Culture	11%	13%	13%
Māori/Pacific Culture	5%	6%	5%
Volcanic & Geothermal	3%	3%	4%
Casinos/Gambling	4%	4%	4%
Don't know/None of the above	15%	13%	11%
Base: Module sample (n=)	1,808	2,172	2,337

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 Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Highly Appealing	41%	41%	40%	41%
Somewhat Appealing	39%	39%	41%	41%
Not very Appealing	11%	12%	11%	11%
Not at all Appealing	3%	3%	3%	3%
Don't know/NA	6%	5%	5%	4%
Base: Heard of Central Otago, excluding residents (n=)	3,641	3,674	3,484	3,464

	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Highly Appealing	73%	78%	81%	74%
Somewhat Appealing	25%	20%	18%	25%
Not very Appealing	2%	1%	1%	1%
Not at all Appealing	0%	1%	0%	0%
Don't know/NA	0%	0%	0%	0%
Base: Visited Central Otago P12M (n=)	357	353	234	239

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.



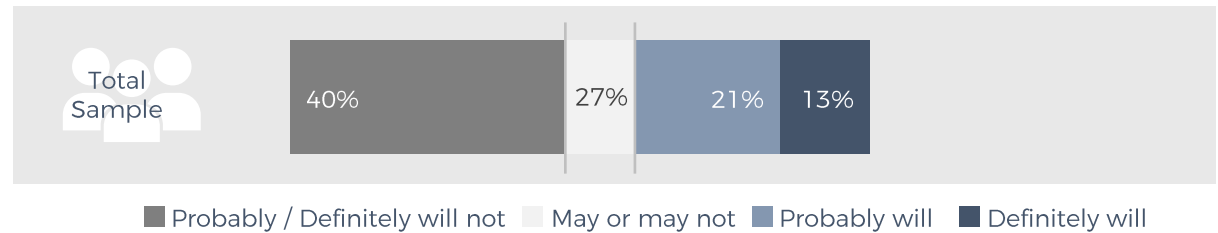
▲ / ▼ Higher or lower than YE Jun 2024

PROPENSITY TO VISIT

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



34% 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=2,863)

	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Definitely will	10%	11%	12%	13%
Probably will	18%	18%	20%	21%
May or may not	26%	28%	28%	27%
Probably / Definitely will not	45%	43%	40%	40%
Base: (n=)	3,533	3,588	2,922	2,863

PROSPECTIVE VISITOR PROFILE

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



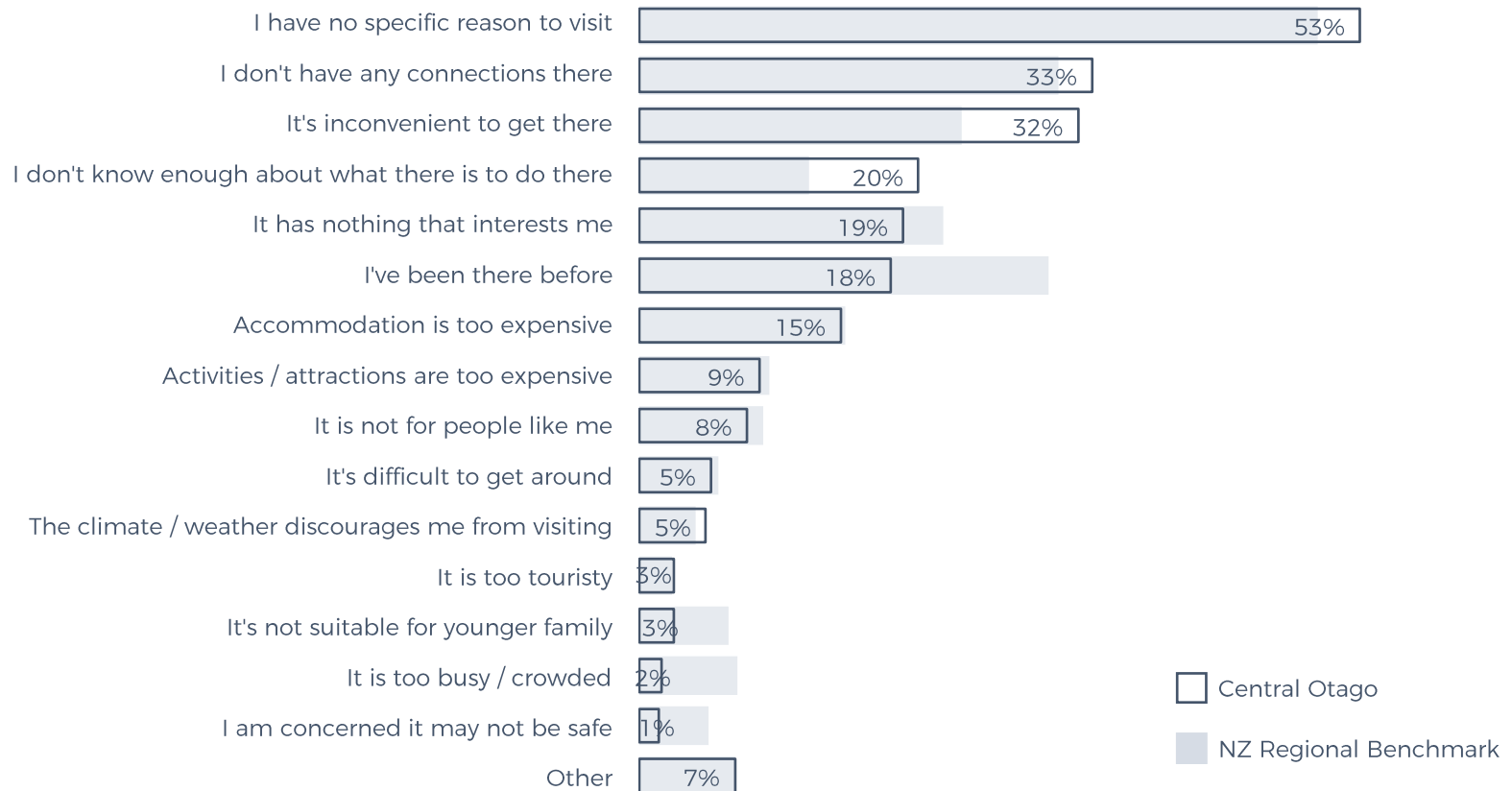
	Total Sample	Prospective Visitors
Region of Residence		
Northland	4%	2% ▼
Auckland	34%	29% ▼
Waikato	10%	7% ▼
Bay of Plenty	6%	2% ▼
Tairāwhiti / Gisborne	0%	1%
Hawke's Bay	4%	2% ▼
Taranaki	3%	1% ▼
Manawatū-Whanganui	5%	3%
Wellington (& Wairarapa)	11%	7% ▼
Tasman	1%	0%
Nelson	2%	1%
Marlborough	1%	1%
West Coast	0%	1%
Canterbury	13%	22% ▲
Otago	5%	16% ▲
Southland	2%	5% ▲
North Island (NET)	76%	61% ▼
South Island (NET)	24%	39% ▲

	Total Sample	Prospective Visitors
Age		
18-19 years	4%	2% ▼
20-29 years	18%	14% ▼
30-39 years	17%	19%
40-49 years	17%	18%
50-59 years	17%	17%
60-69 years	13%	12%
70+ years	14%	18%
Household Composition		
My husband, wife or partner	59%	68% ▲
My mother and/or father	6%	5%
My children aged under 5	11%	8% ▲
My children aged 5 to 14	17%	19%
My children aged 15 or older	14%	14%
Other family/relatives	10%	8%
Other person(s)	7%	5%
None of the above - I live alone	16%	11% ▼

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

BARRIERS TO VISITING

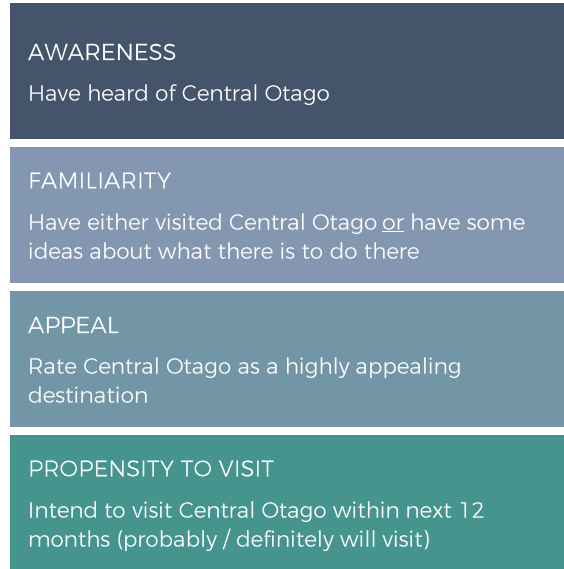
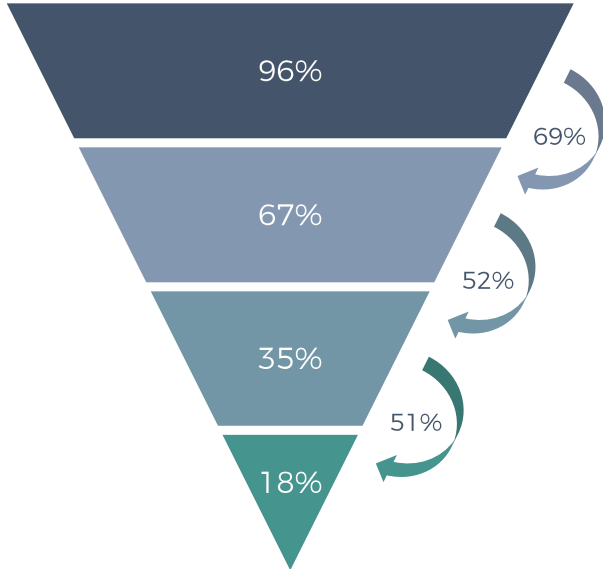
You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?



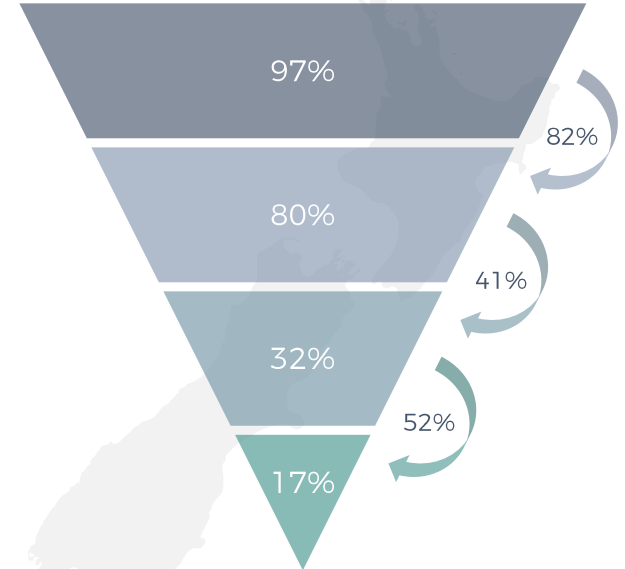
CONVERTING AWARENESS TO VISITATION



CENTRAL OTAGO (YE JUN 2025)



NZ REGIONAL BENCHMARK



	YE Jun 2022	YE Jun 2023	YE Jun 2024
Awareness	97% 69%	97% 69%	96% 69%
Familiarity	67% 52%	66% 52%	66% 51%
Appeal	35% 50%	34% 50%	34% 51%
Propensity to Visit	17%	17%	17%

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 has a dark blue overlay. 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?



Queenstown, and to a lesser extent Wanaka and Arrowtown, continues to be commonly associated with Central Otago.

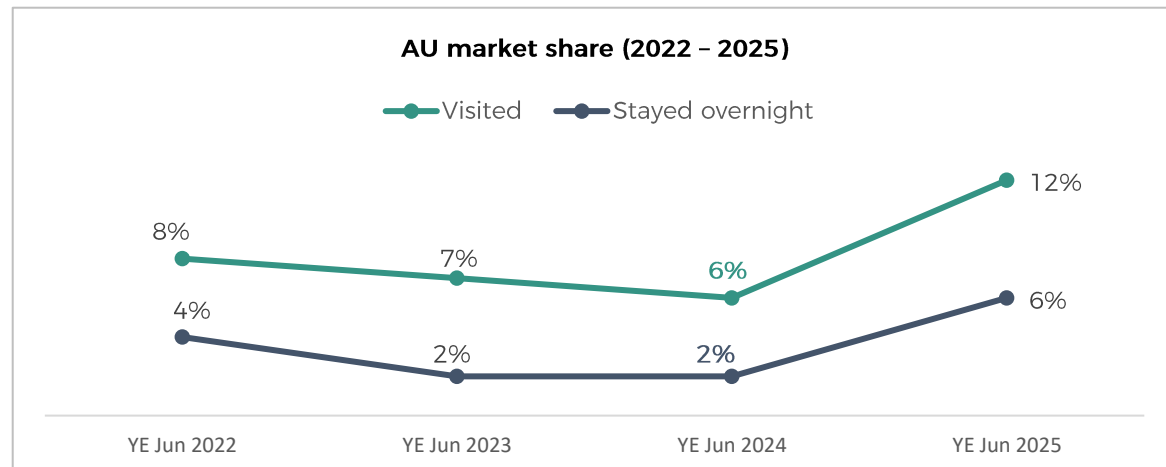
	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Queenstown	25%	27%	28%	32%
Wānaka	11%	12%	11%	12%
Alexandra	8%	7%	7%	10%
Arrowtown	8%	7%	7%	10%
Clyde	6%	5%	6%	8%
Cromwell & Bannockburn	7%	6%	6%	8%
Gibbston Valley	5%	5%	4%	6%
Omarama & Twizel	5%	4%	4%	5%
Naseby	4%	3%	3%	5%
Hawea	4%	4%	4%	5%
Ranfurly & Maniototo	3%	3%	3%	4%
Roxburgh & Teviot	5%	3%	3%	4%
Base: Total sample (n=)	3,712	3,737	3,636	3,639

TOURISM MARKET SHARE

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



Base: Total Sample (YE Jun 25) - AU Travellers Visited NZ in Past 12 Months (n=703)



RECENT VISITOR PROFILE

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



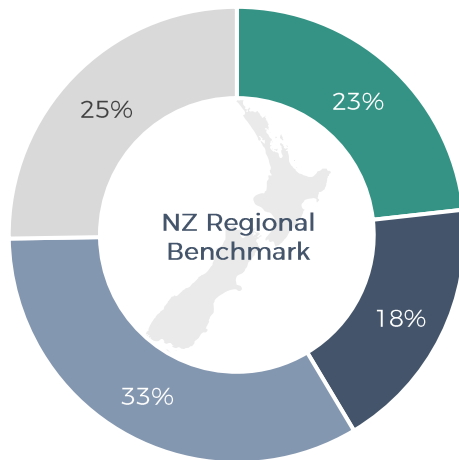
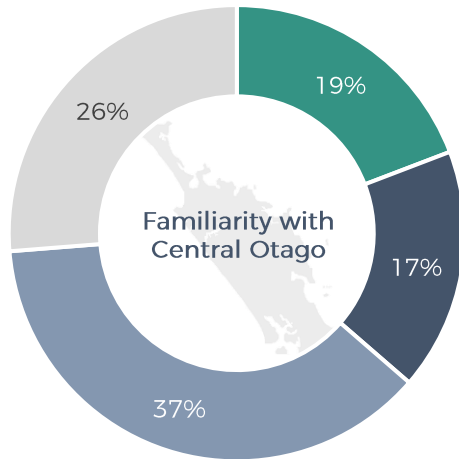
	Total Sample	Recent Visitors
Region of Residence		
Australian Capital Territory	2%	4%
New South Wales	31%	33%
Northern Territory	1%	5%
Queensland	20%	22%
South Australia	7%	2% ▼
Tasmania	2%	1%
Victoria	26%	27%
Western Australia	10%	6%

	Total Sample	Recent Visitors
Age		
18-19 years	3%	4%
20-29 years	17%	27% ▲
30-39 years	19%	23%
40-49 years	16%	18%
50-59 years	16%	7% ▼
60-69 years	15%	12%
70+ years	14%	9%
Household Composition		
My husband, wife or partner	60%	61%
My mother and/or father	6%	9%
My children aged under 5	10%	16%
My children aged 5 to 14	20%	34% ▲
My children aged 15 or older	15%	11%
Other family/relatives	8%	2% ▼
Other person(s)	5%	4%
None of the above - I live alone	16%	17%

▲ / ▼ 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

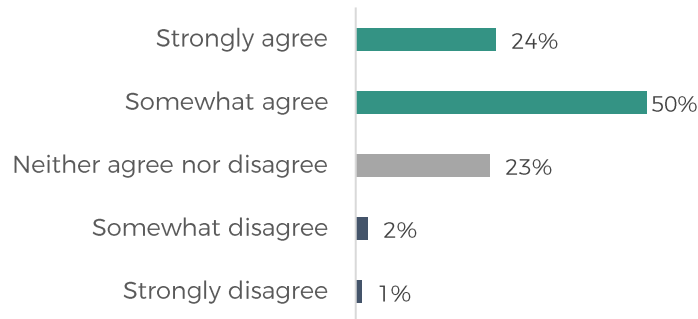


POSITIONING

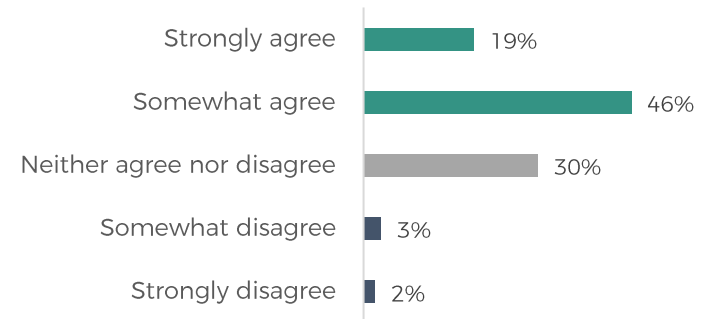
To what extent do you agree or disagree with each of the following statements?



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

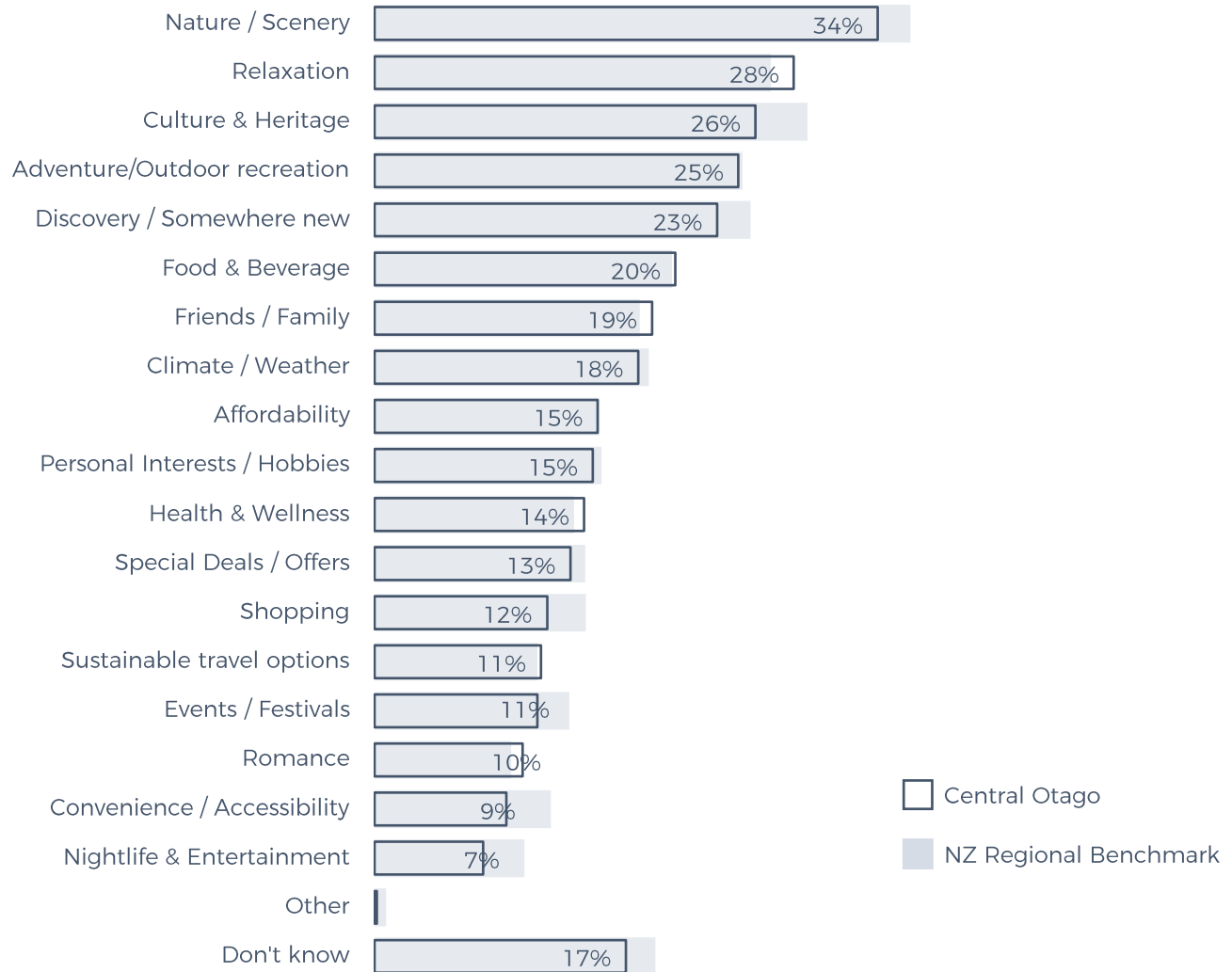


	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Strongly agree	24%	23%	22%	24%
Somewhat agree	45%	50%	51%	50%
Neither agree nor disagree	28%	25%	25%	23%
Somewhat disagree	3%	2%	2%	2%
Strongly disagree	1%	1%	1%	1%
Base: Heard of Central Otago (n=)	1,023	1,545	2,172	1,848

	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Strongly agree	19%	17%	17%	19%
Somewhat agree	39%	43%	41%	46%
Neither agree nor disagree	35%	34%	36%	30%
Somewhat disagree	5%	4%	4%	3%
Strongly disagree	2%	2%	2%	2%
Base: Heard of Central Otago (n=)	1,023	1,545	2,172	1,848

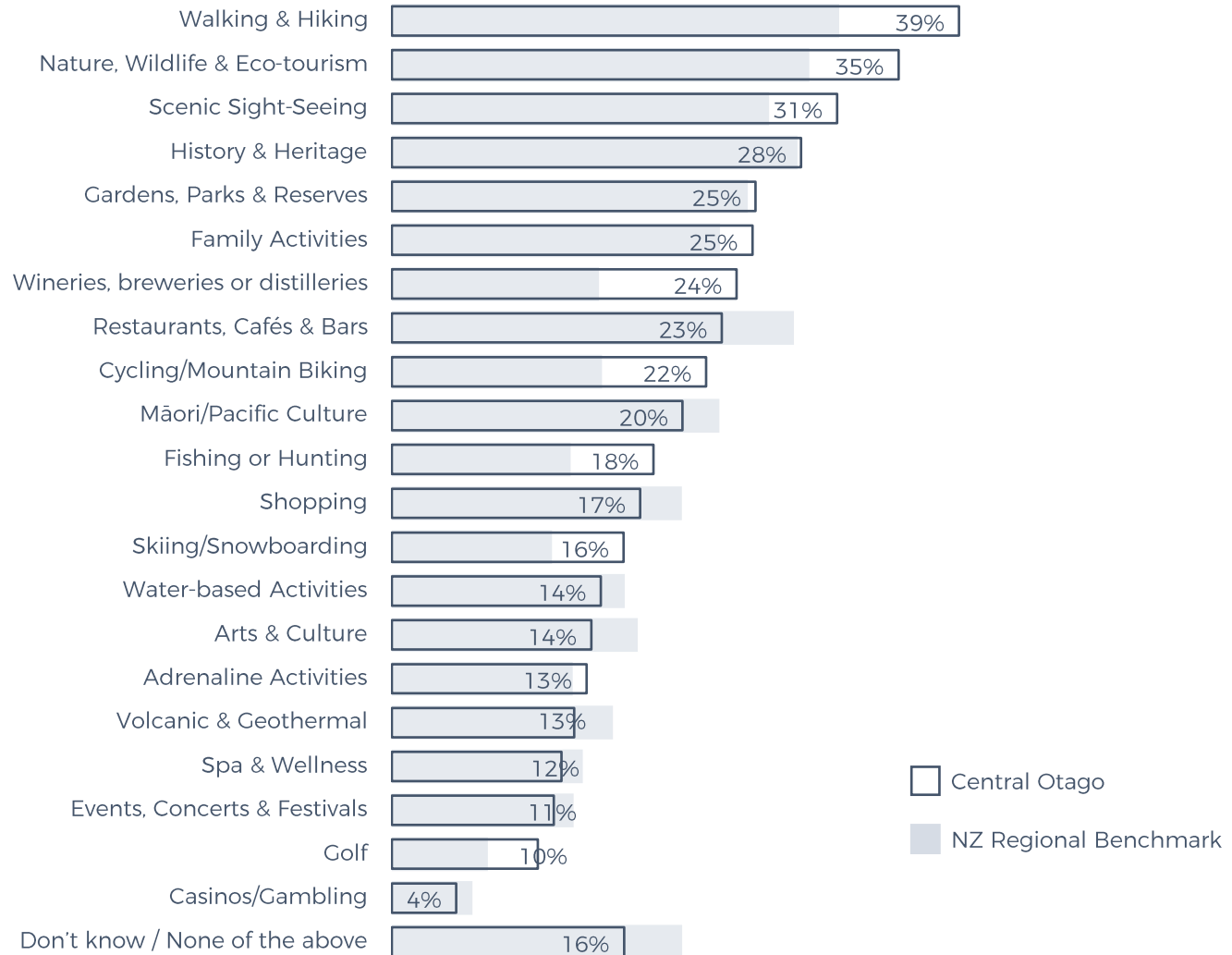
DESTINATION DRIVERS

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

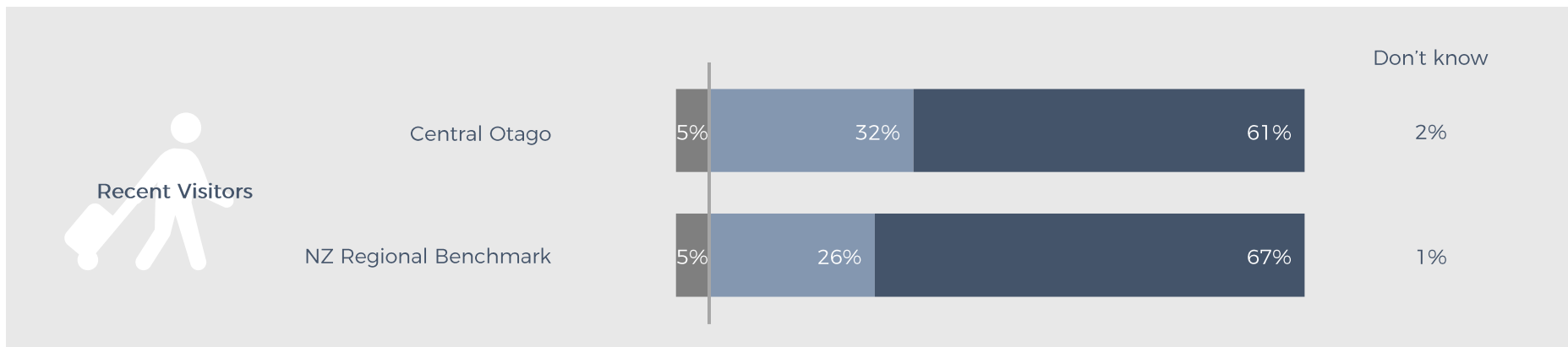
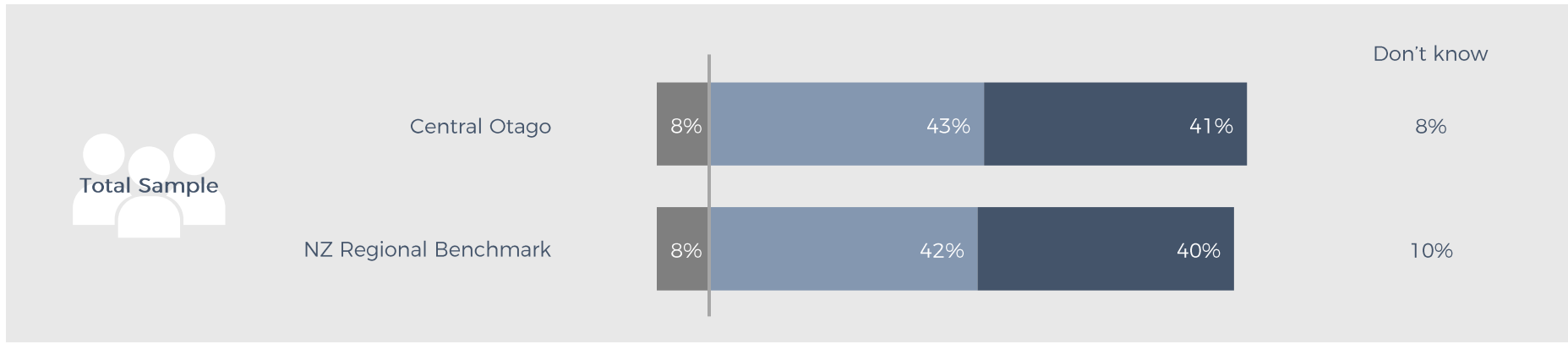
Which, if any, of the following activities or experiences do you associate with Central Otago?



	YE Jun 23	YE Jun 24	YE Jun 25
Walking & Hiking	33%	39%	39%
Nature, Wildlife & Eco-tourism	32%	35%	35%
Scenic Sight-Seeing	26%	28%	31%
History & Heritage	25%	27%	28%
Gardens, Parks & Reserves	21%	25%	25%
Family Activities	21%	23%	25%
Wineries, breweries or distilleries	20%	23%	24%
Restaurants, Cafés & Bars	21%	23%	23%
Cycling/Mountain Biking	18%	21%	22%
Māori/Pacific Culture	19%	20%	20%
Fishing or Hunting	16%	20%	18%
Shopping	14%	15%	17%
Skiing/Snowboarding	12%	14%	16%
Water-based Activities	11%	13%	14%
Arts & Culture	14%	14%	14%
Adrenaline Activities	13%	15%	13%
Volcanic & Geothermal	12%	12%	13%
Spa & Wellness	12%	13%	12%
Events, Concerts & Festivals	9%	9%	11%
Golf	8%	9%	10%
Casinos/Gambling	5%	5%	4%
Don't know/None of the above	22%	21%	16%
Base: Module sample (n=)	1,545	2,021	1,848

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 Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Highly Appealing	36%	38%	40%	41%
Somewhat Appealing	45%	46%	43%	43%
Not very Appealing	6%	6%	6%	6%
Not at all Appealing	2%	1%	1%	2%
Don't know/NA	12%	9%	10%	8%
Base: Heard of Central Otago (n=)	2,390	2,508	2,548	2,688

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.



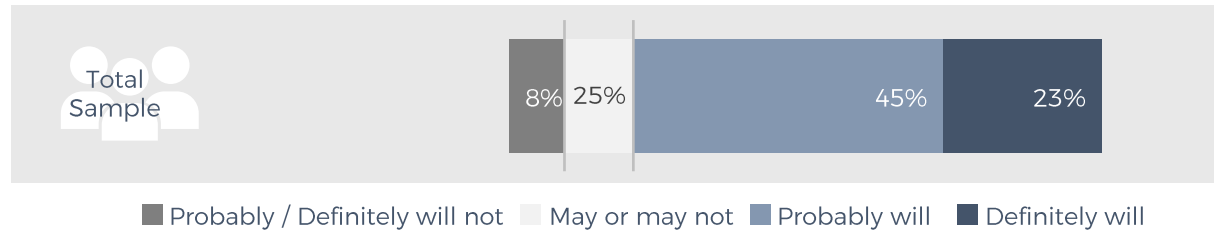
▲ / ▼ Higher or lower than YE Jun 2024

PROPENSITY TO VISIT

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



68% 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=1,293)

	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Definitely will	14%	13%	12%	23%
Probably will	30%	31%	30%	45%
May or may not	43%	42%	43%	25%
Probably / Definitely will not	13%	13%	15%	8%
Base: (n=)	n=1,747	n=1,912	n=1,957	1,293

PROSPECTIVE VISITOR PROFILE

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



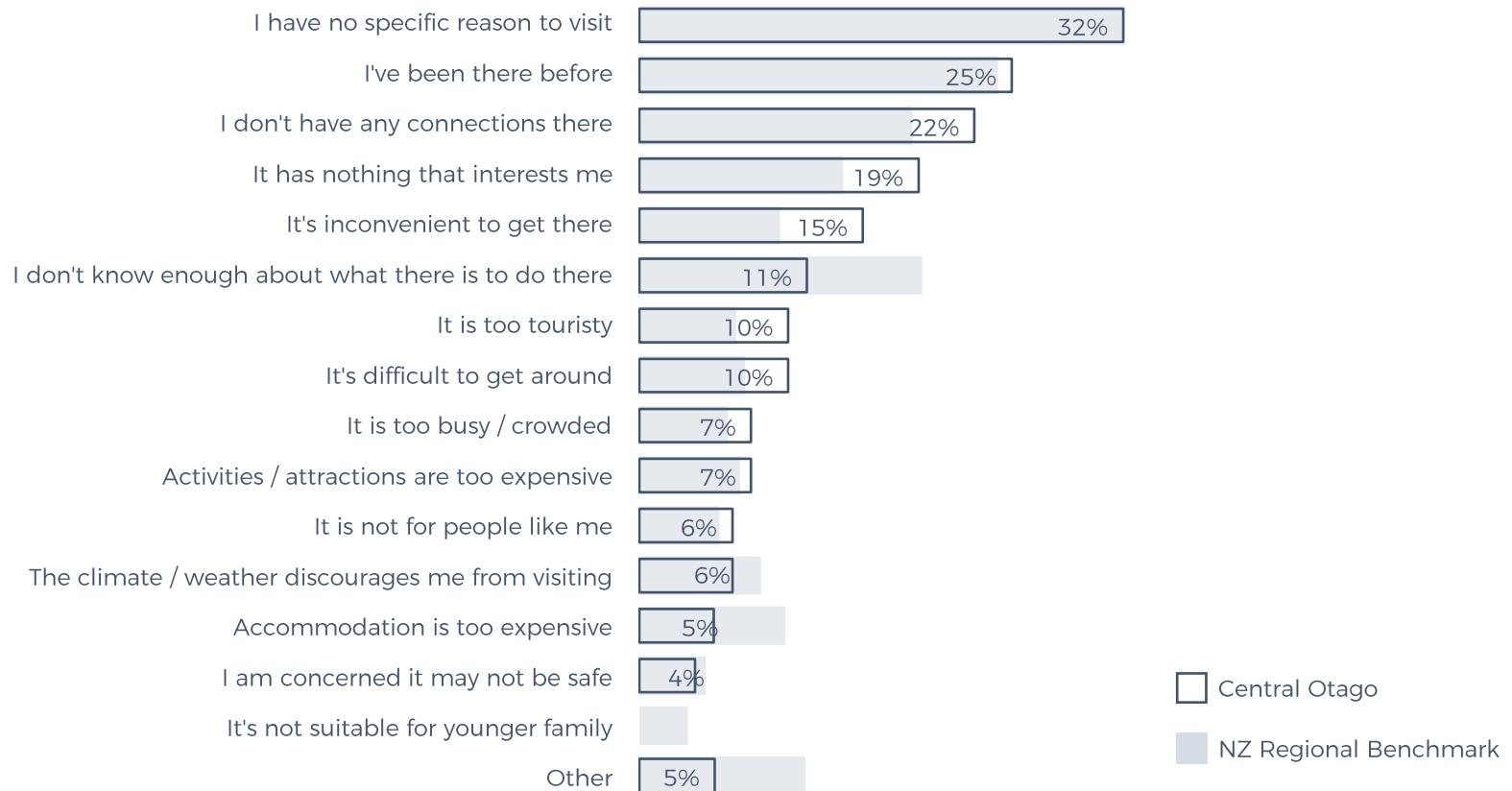
	Total Sample	Prospective Visitors
Region of Residence		
Australian Capital Territory	2%	6% ▲
New South Wales	31%	31%
Northern Territory	1%	3% ▲
Queensland	20%	16%
South Australia	7%	7%
Tasmania	2%	2%
Victoria	26%	27%
Western Australia	10%	8%

	Total Sample	Prospective Visitors
Age		
18-19 years	3%	1% ▼
20-29 years	17%	25% ▲
30-39 years	19%	33% ▲
40-49 years	16%	15%
50-59 years	16%	13%
60-69 years	15%	8% ▼
70+ years	14%	5% ▼
Household Composition		
My husband, wife or partner	60%	64%
My mother and/or father	6%	9%
My children aged under 5	10%	15% ▲
My children aged 5 to 14	20%	34% ▲
My children aged 15 or older	15%	13%
Other family/relatives	8%	6%
Other person(s)	5%	1% ▼
None of the above - I live alone	16%	10% ▼

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

BARRIERS TO VISITING

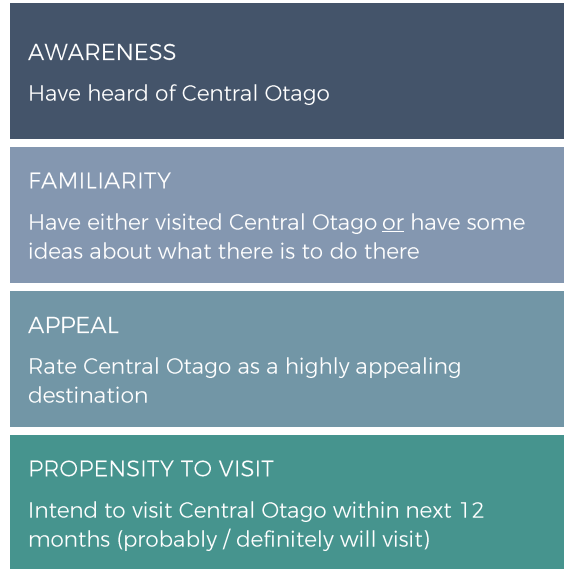
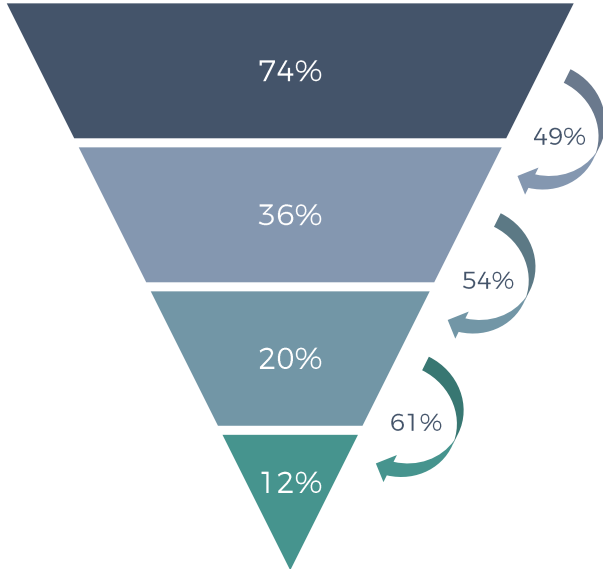
You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?



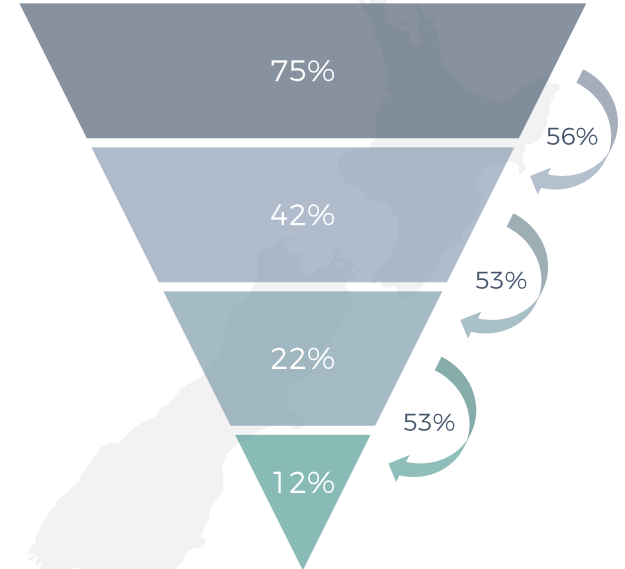
CONVERTING AWARENESS TO VISITATION



CENTRAL OTAGO (YE JUN 2025)



NZ REGIONAL BENCHMARK



	YE Jun 2022	YE Jun 2023	YE Jun 2024
Awareness	64%	67%	71%
Familiarity	29%	29%	31%
Appeal	15%	16%	18%
Propensity to Visit	9%	9%	10%

Conversion rates (from previous stage to current stage):
 Awareness to Familiarity: 44%
 Familiarity to Appeal: 51%
 Appeal to Propensity to Visit: 60%
 Awareness to Familiarity: 44%
 Familiarity to Appeal: 54%
 Appeal to Propensity to Visit: 59%
 Awareness to Familiarity: 44%
 Familiarity to Appeal: 57%
 Appeal to Propensity to Visit: 56%

A woman wearing a light-colored hat and a light-colored top is seen from behind, standing on 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. A large white circle is positioned on the left side of the image.

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.



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

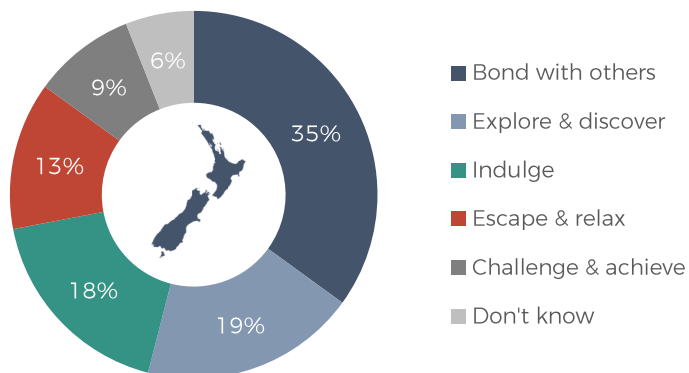
Holidays are a chance for me to get outside, get active and make the most of the natural environment. I like to challenge myself physically, pushing my personal limits.

DOMESTIC VS. AUSTRALIAN TRAVELLERS

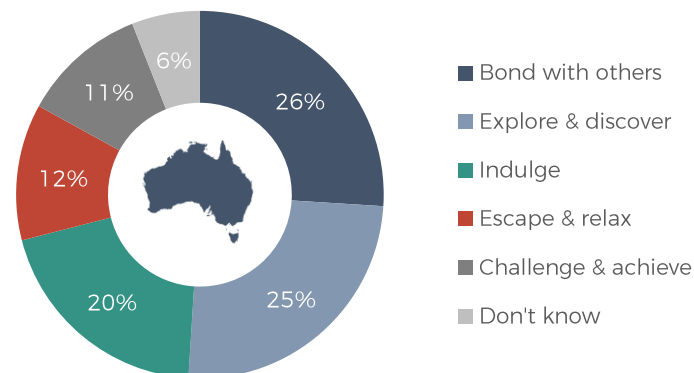


Which one of the following best describes you and your views on travel and holidays?

NEW ZEALAND



AUSTRALIA



	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Bond with others	38%	38%	38%	35%
Explore & discover	17%	17%	18%	19%
Indulge	17%	16%	16%	18%
Escape & relax	13%	14%	13%	13%
Challenge & achieve	9%	8%	9%	9%
Don't know	7%	7%	6%	6%
Base: Total Sample, excl. residents (n=)	3,765	3,806	3,642	3,622

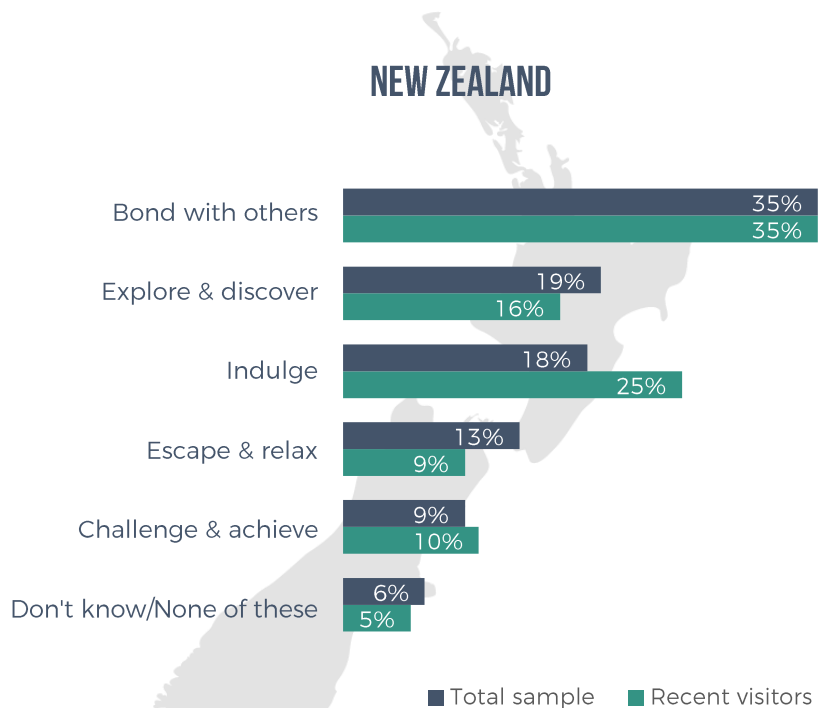
	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Bond with others	29%	27%	28%	26%
Explore & discover	23%	23%	25%	25%
Indulge	20%	19%	19%	20%
Escape & relax	10%	12%	12%	12%
Challenge & achieve	12%	12%	11%	11%
Don't know	6%	6%	5%	6%
Base: Total Sample (n=)	3,712	3,737	3,636	3,639

DOMESTIC VS. AUSTRALIAN TRAVELLERS



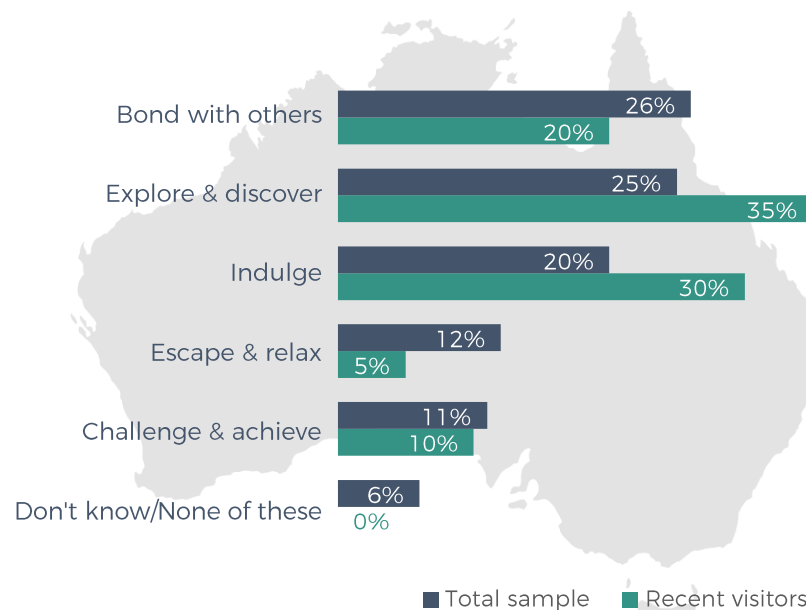
Which one of the following best describes you and your views on travel and holidays?

NEW ZEALAND



Base: (YE Jun 25) Total sample, excl. residents (n=3,622);
Visited Central Otago P12M (n=249)

AUSTRALIA



Base: (YE Jun 25) Total sample (n= 3,639);
Visited Central Otago P12M (n=82)

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	36%	34%	42%	30%	33%	35%
I have never visited, but do have some ideas about what you can do there	16%	18%	17%	15%	21%	16%
I have never visited, and don't know much about what you can do there	35%	33%	28%	39%	31%	33%
I have never heard of Central Otago	13%	15%	13%	16%	14%	15%
Base: (YE Jun 25) Total sample, excl. residents (n=)	2,200	1,572	1,373	914	730	7,243

Appeal	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total Sample
Highly appealing	39%	46%	47%	37%	40%	41%
Somewhat appealing	41%	42%	39%	44%	46%	42%
Not very appealing	11%	6%	8%	10%	8%	9%
Not at all appealing	2%	2%	2%	2%	2%	2%
Don't know / NA	7%	4%	4%	7%	5%	6%
Base: (YE Jun 25) Total sample, excl. residents, heard of Central Otago (n=)	1,906	1,338	1,199	765	625	6,152

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	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total Sample
Strongly agree	24%	27%	29%	22%	25%	25%
Somewhat agree	49%	49%	51%	49%	55%	49%
Neither agree nor disagree	23%	21%	17%	25%	16%	23%
Somewhat disagree	2%	2%	2%	4%	3%	3%
Strongly disagree	1%	1%	1%	1%	0%	1%
Base: (YE Jun 25) Module sample - Heard of Central Otago, excl. residents (n=)	1,318	890	790	524	444	4,185

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	18%	20%	24%	14%	18%	19%
Somewhat agree	41%	45%	43%	41%	52%	43%
Neither agree nor disagree	32%	30%	26%	35%	26%	31%
Somewhat disagree	5%	3%	6%	7%	4%	5%
Strongly disagree	3%	2%	1%	4%	1%	3%
Base: (YE Jun 25) Module sample - Heard of Central Otago, excl. residents (n=)	1,318	890	790	524	444	4,185

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	46%	48%	48%	45%	42%	46%
Nature, Wildlife & Eco-tourism	35%	40%	38%	38%	36%	36%
Scenic Sight-Seeing	39%	36%	38%	36%	29%	36%
History & Heritage	35%	37%	33%	32%	31%	34%
Wineries, breweries or distilleries	34%	30%	38%	30%	33%	33%
Cycling/Mountain Biking	32%	30%	31%	31%	31%	31%
Restaurants, Cafés & Bars	34%	30%	29%	27%	26%	30%
Family Activities	31%	29%	27%	27%	26%	28%
Gardens, Parks & Reserves	26%	27%	25%	23%	26%	25%
Fishing or Hunting	25%	27%	26%	23%	22%	25%
Skiing/Snowboarding	23%	24%	21%	25%	21%	22%
Adrenaline Activities	21%	20%	19%	17%	17%	19%
Water-based Activities	18%	16%	18%	15%	14%	16%
Shopping	14%	16%	15%	14%	19%	15%
Arts & Culture	13%	15%	13%	13%	13%	13%
Golf	14%	12%	15%	11%	15%	13%
Events, Concerts & Festivals	13%	13%	14%	13%	13%	13%
Spa & Wellness	13%	13%	13%	11%	15%	12%
Māori/Pacific Culture	10%	14%	13%	11%	16%	12%
Volcanic & Geothermal	6%	10%	9%	5%	10%	8%
Casinos/Gambling	3%	4%	5%	4%	6%	4%
Don't know/None of the above	14%	12%	8%	14%	8%	13%
Base: (YE Jun 25) Module sample - heard of Central Otago, excl. residents (n=)	1,318	890	790	524	444	4,185

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
	10 (Extremely likely)	22%	24%	26%	20%	23%	23%
	9	17%	19%	19%	14%	18%	17%
Passive	8	27%	25%	24%	26%	30%	26%
	7	14%	15%	15%	18%	13%	15%
Detractors	6	6%	8%	5%	8%	5%	6%
	5	7%	5%	6%	8%	6%	7%
	4	2%	2%	2%	2%	2%	2%
	3	1%	1%	1%	1%	2%	1%
	2	1%	1%	1%	1%	0%	1%
	1	1%	0%	0%	0%	0%	0%
	0 (Not at all likely)	3%	1%	1%	1%	1%	2%
NPS		+18	+26	+28	+13	+23	+21
	Base: (YE Jun 25) Visited Central Otago previously (n=)	791	540	580	274	243	2,544

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
Definitely will	15%	16%	19%	12%	17%	16%
Probably will	24%	33%	33%	25%	34%	28%
May or may not	25%	27%	23%	29%	29%	26%
Probably will not	12%	6%	7%	11%	4%	9%
Definitely will not	24%	19%	18%	24%	17%	21%
Base: (YE Jun 25) Intend to travel around/to New Zealand in next 12 months and heard of Central Otago (n=)	1,361	852	862	514	429	4,156

BARRIERS TO VISITING



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	54%	45%	53%	52%	40%	51%
I've been there before	17%	21%	30%	10%	13%	19%
I don't have any connections there	38%	30%	23%	39%	12%	32%
I don't know enough about what there is to do there	21%	19%	14%	23%	20%	20%
It is too touristy	2%	5%	3%	4%	0%	3%
It is too busy / crowded	2%	3%	2%	1%	3%	2%
I am concerned it may not be safe	2%	2%	2%	0%	0%	2%
Accommodation is too expensive	14%	19%	7%	19%	7%	14%
Activities / attractions are too expensive	9%	10%	3%	12%	4%	9%
It has nothing that interests me	19%	16%	24%	17%	27%	19%
It is not for people like me	8%	7%	9%	8%	4%	8%
It's inconvenient to get there	34%	27%	27%	35%	32%	31%
It's difficult to get around	5%	7%	5%	5%	9%	6%
It's not suitable for younger family	4%	2%	0%	2%	3%	2%
The climate / weather discourages me from visiting	6%	4%	5%	4%	1%	5%
Other	5%	9%	8%	6%	4%	7%
Base: (YE Jun 25) Intend to travel around/to New Zealand in next 12 months, heard of Central Otago but unlikely to visit (n=)	420	178	187	155	75	1,074

