

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

VISITOR INSIGHTS PROGRAMME

MARKET PERCEPTIONS: CENTRAL OTAGO

JULY - DECEMBER 2021

BACKGROUND & RESEARCH APPROACH

Background

Angus & Associates is an independent 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 and 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. Tourism Central Otago joined the Market Perceptions programme in July 2021. This report is based on data collected between July and December 2021.

The 'regional benchmark' referenced in this report is the average across 13 destinations – Auckland, Waikato, Bay of Plenty, The Coromandel, Tairāwhiti, Rotorua, Taupō, Hawke's Bay, Ruapehu, Waitaki, Central Otago, Queenstown and Dunedin.

For more information about this research please contact:

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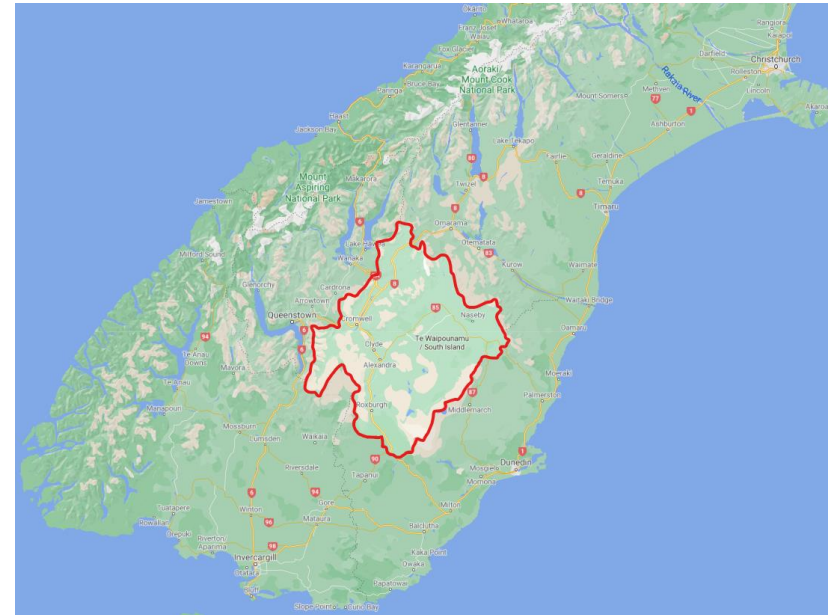
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CENTRAL OTAGO

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 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

SNAPSHOT (JULY - DECEMBER 2021)
NEW ZEALAND TRAVELLERS

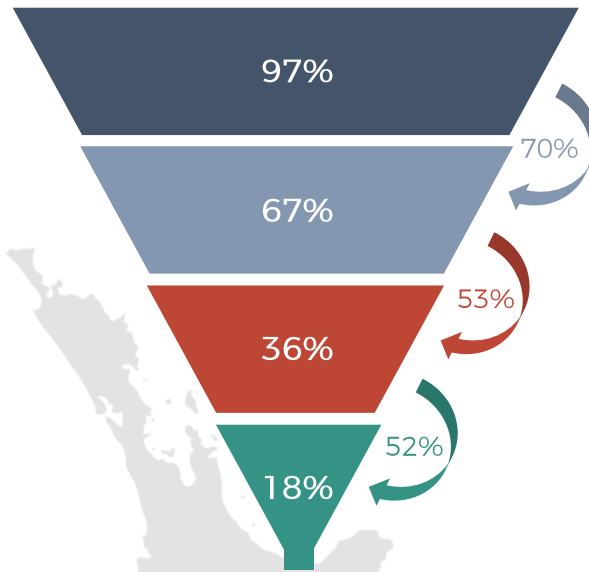
3 out of 4 New Zealanders travelled domestically in the past 12 months



10% 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
- 45% Wineries
- 38% Scenic Sightseeing
- 37% Cycling/Mountain Biking
- 35% Nature, Wildlife & Eco-Tourism

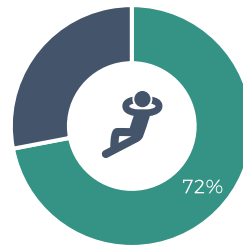


AWARENESS
 Heard of Central Otago

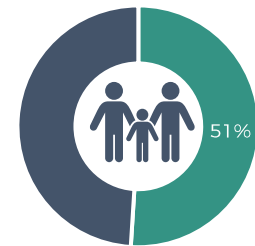
KNOWLEDGE
 Visited Central Otago or have some ideas about what to do there

APPEAL
 Consider Central Otago to be 'highly appealing'

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



72% of New Zealand travellers agree a holiday in Central Otago is an opportunity to slow down and relax



51% of New Zealand travellers agree Central Otago is an ideal place to reconnect with friends and family

SNAPSHOT (JULY - DECEMBER 2021)

AUSTRALIAN TRAVELLERS



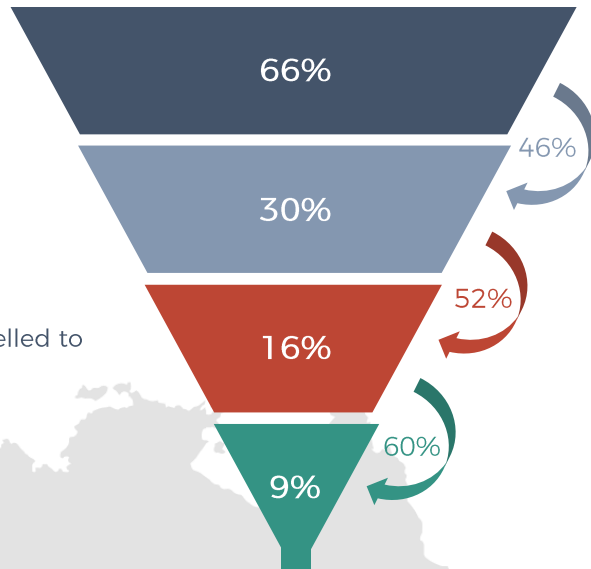
5% of Australians surveyed had travelled to New Zealand in the past 12 months



13% of Australians who had travelled to New Zealand in the past 12 months had visited Central Otago

Australian travellers associate Central Otago with...

- 34% Walking & Hiking
- 30% Nature, Wildlife & Eco-Tourism
- 24% Scenic Sightseeing
- 23% History & Heritage
- 23% Gardens Parks and Reserves

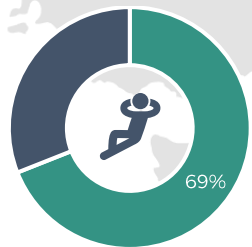
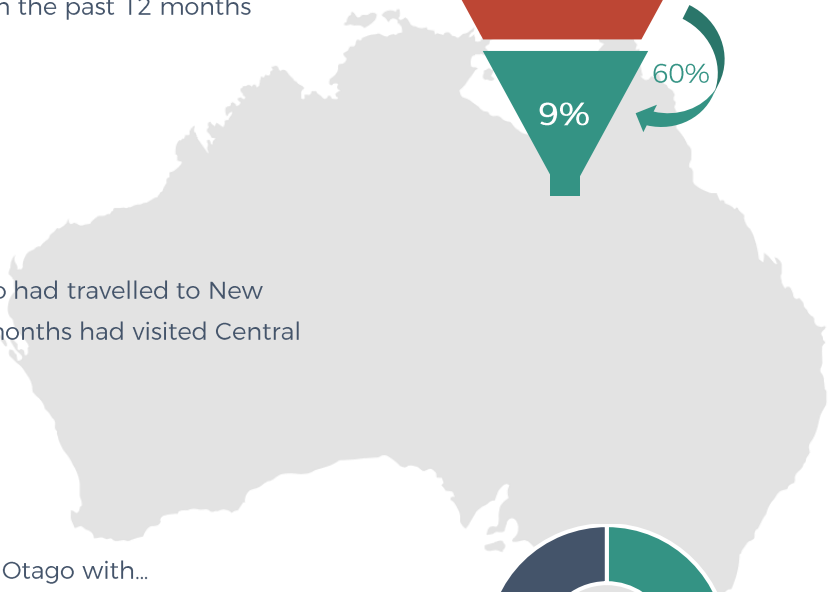


AWARENESS
Heard of Central Otago

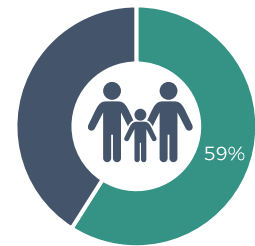
KNOWLEDGE
Visited Central Otago or have some ideas about what to do there

APPEAL
Consider Central Otago to be 'highly appealing'

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



69% 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 light-colored hat and a white 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.

**NEW ZEALAND
TRAVELLERS**

NEW ZEALAND TRAVELLERS

CENTRAL OTAGO UPDATE: JULY – DECEMBER 2021

While the percentage of New Zealanders (aged 18+) travelling domestically remained stable at 77%, the past year has been influenced by increased profile of domestic travel as well as increased domestic competition and destination marketing by other regions.

Of the New Zealanders who had travelled domestically in the past 12 months, 10% visited Central Otago, with 7% staying overnight. This is likely to be lower than normal given the extended lockdown in Auckland. Central Otago's key markets originate from Canterbury, Otago and Southland with a strong representation from Auckland given the distance to travel.

There is some confusion around the geographical boundaries of Central Otago. When New Zealand travellers think of Central Otago the first places that come to mind are Queenstown, Wanaka and Arrowtown (closely followed by Alexandra and Cromwell/Bannockburn). After answering this question, respondents are then shown a map of Central Otago so the following questions are then answered with the correct context.

72% of New Zealand travellers strongly or somewhat agree that Central Otago is a great place to relax and unwind while 51% see the region as a great place to reconnect with family and friends. Interestingly cycling/biking comes fourth in terms of associated activities, behind walking/hiking, wineries and scenic sight seeing.

Central Otago's appeal is stronger than the regional benchmark with a significant lift in appeal post-visitation which presents a great opportunity for word of mouth and visitor advocacy.

The main barrier to travel is having no reason to visit Central Otago, followed closely by the perception that it is inconvenient to get to the region.

Auckland, Otago and Canterbury residents are the most likely to visit Central Otago in the next 12 months. The age range and household composition of intending visitors are similar to the total sample.



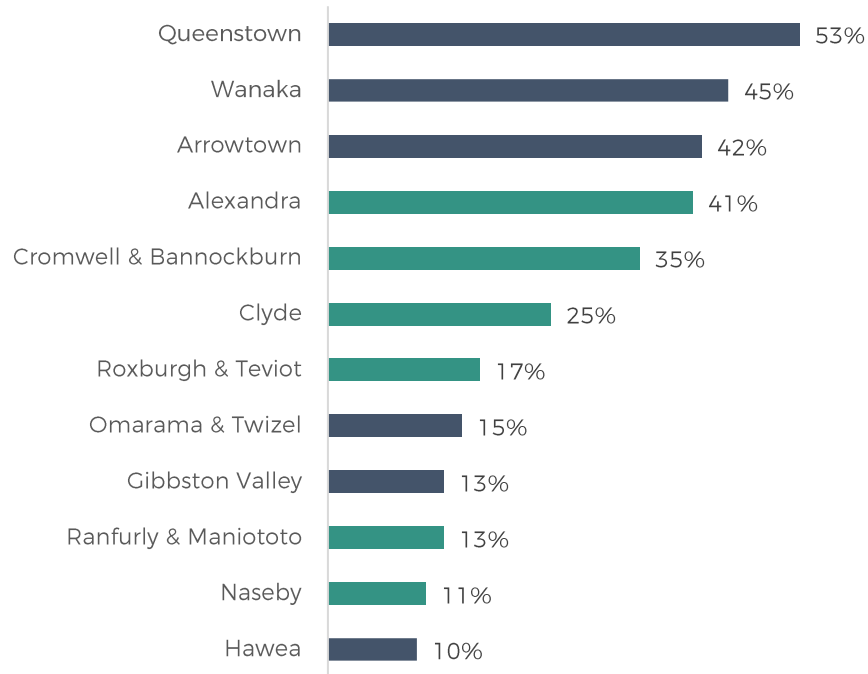
AUSTRALIAN TRAVELLERS

CENTRAL OTAGO ASSOCIATIONS



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

TOP-OF-MIND PLACES



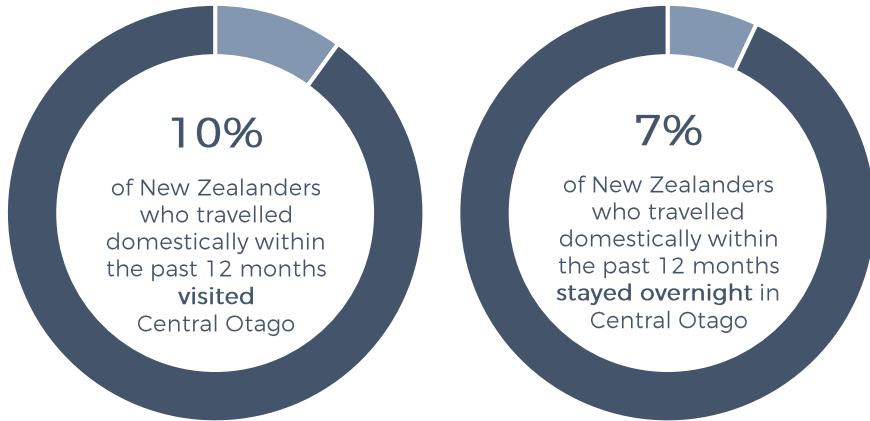
Base: Total sample (n=1897)

MARKET PENETRATION, FAMILIARITY & DESTINATION APPEAL



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

77% of New Zealanders surveyed travelled domestically in the past 12 months

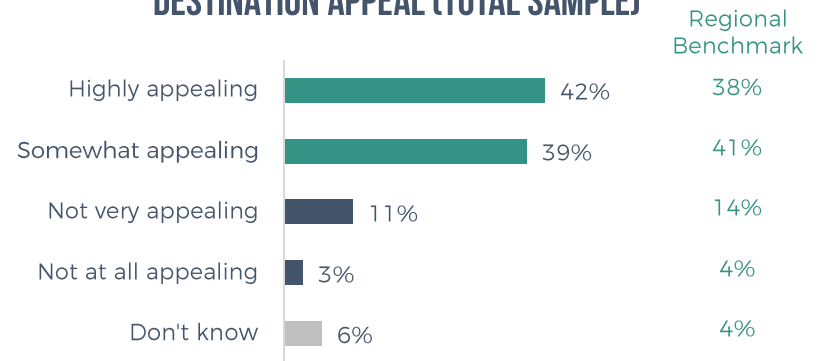


Base: Travelled around NZ in past 12 months, excluding residents (n=1855)

Familiarity	%	Regional Benchmark
I have visited Central Otago	52	68%
I have never visited, but do have some ideas about what you can do there	16	13%
I have never visited, and don't know much about what you can do there	29	16%
I have never heard of Central Otago	3	2%

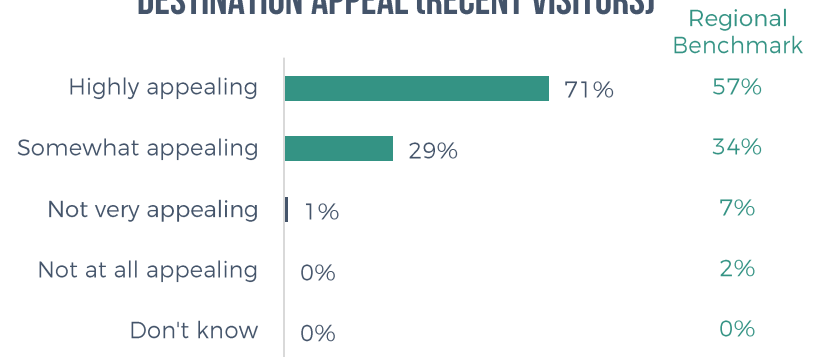
Base: Total sample, excluding residents (n=1897)

DESTINATION APPEAL (TOTAL SAMPLE)



Base: Total sample who have heard of Central Otago, excluding residents (n=1838)

DESTINATION APPEAL (RECENT VISITORS)



Base: Visited Central Otago in past 12 months (n=187)

VISITOR PROFILES



The profile of the total sample and profile of visitors from New Zealand to Central Otago?

Region of Residence	Total Sample (excl. residents) %	Visited Central Otago (Past 12 Months) %
Northland	4	3
Auckland	33	22 ▼
Waikato	10	5 ▼
Bay of Plenty	6	5
Tairāwhiti/Gisborne	1	0
Hawke's Bay	4	2
Taranaki	3	1
Manawatu-Whanganui	5	2 ▼
Wellington	11	5 ▼
Tasman	1	3
Nelson	2	1
Marlborough	1	1
West Coast	1	1
Canterbury	12	25 ▲
Otago	5	20 ▲
Southland	2	5
Base:	n=1897	n=187

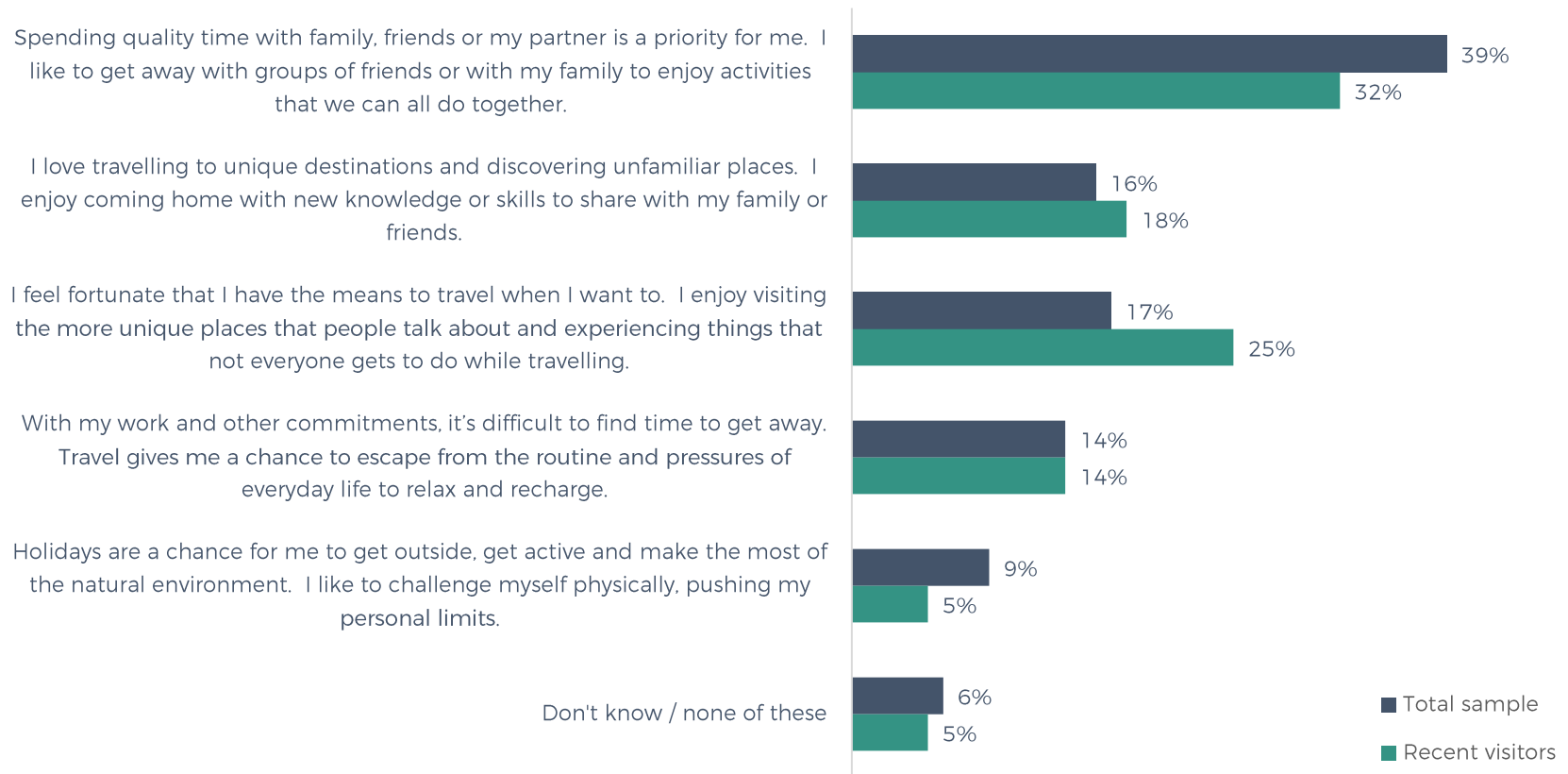
Age	Total Sample (excl. residents) %	Visited Central Otago (Past 12 Months) %
18-19 years	3	3
20-29 years	18	15
30-39 years	17	11 ▼
40-49 years	16	12
50-59 years	17	16
60-69 years	14	20 ▲
70+ years	15	23 ▲
Household Composition	%	%
My husband, wife or partner	63	79 ▲
My mother and/or father	8	4 ▼
My children aged under 5	11	8
My children aged 5 to 14	17	10 ▼
My children aged 15 or older	13	12
Other family/relatives	9	5 ▼
Other person(s)	9	4 ▼
None of the above - I live alone	12	10
Base:	n=1897	n=187

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

CENTRAL OTAGO VISITOR PROFILES (PERSONAS)



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



Base: Total sample, excluding residents (n=1897); Visited Central Otago in past 12 months (n=187)

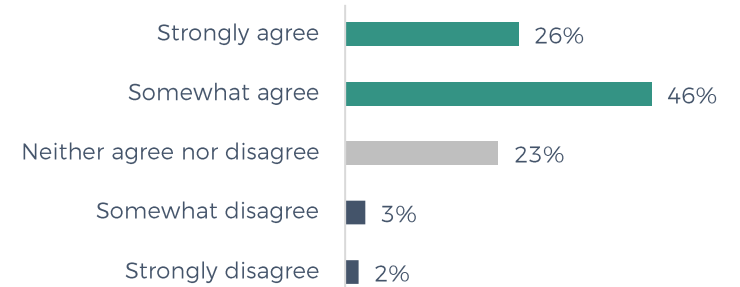
CENTRAL OTAGO POSITIONING



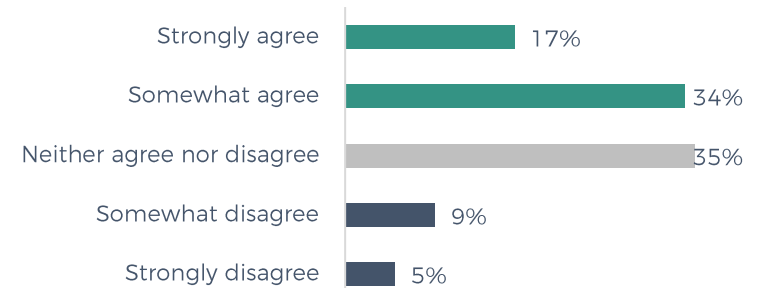
What is the first thing that comes to mind when you think about Central Otago?
To what extent do you agree or disagree with the following statements?



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



ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO



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

Top 15 Activities / Experiences	Total Sample (excl. residents)	Visited Central Otago (Past 12 Months)
	%	%
Walking & Hiking	50	70
Wineries	45	72
Scenic Sight-Seeing	38	58
Cycling/Mountain Biking	37	73
Nature, Wildlife & Eco-tourism	35	54
History & Heritage	34	51
Restaurants, Cafés & Bars	32	56
Family Activities	30	61
Gardens, Parks & Reserves	25	34
Adrenaline Activities	24	44
Golf, Fishing & Hunting	24	44
Skiing/Snowboarding	21	45
Water-based Activities	16	38
Events, Concerts & Festivals	13	24
Shopping	13	14
Don't know	15	4
Base:	n=658	n=71

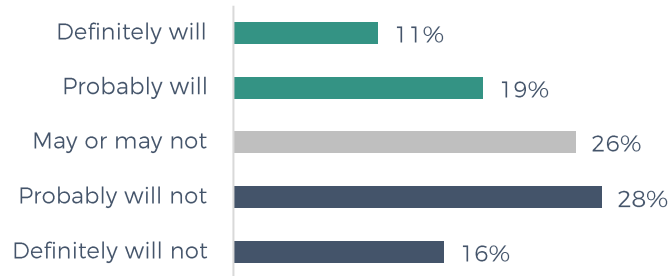
PROPENSITY TO VISIT & BARRIERS TO VISITING



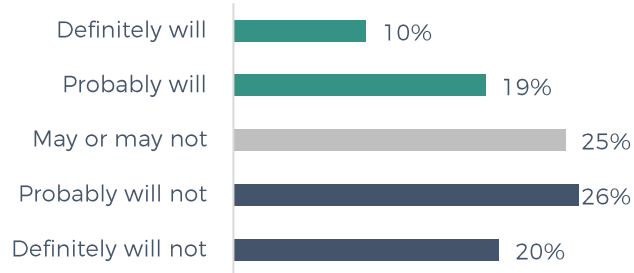
How likely are you to visit Central Otago within the next 12 months? (for any reason / for leisure purposes)
 You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?

83% 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)

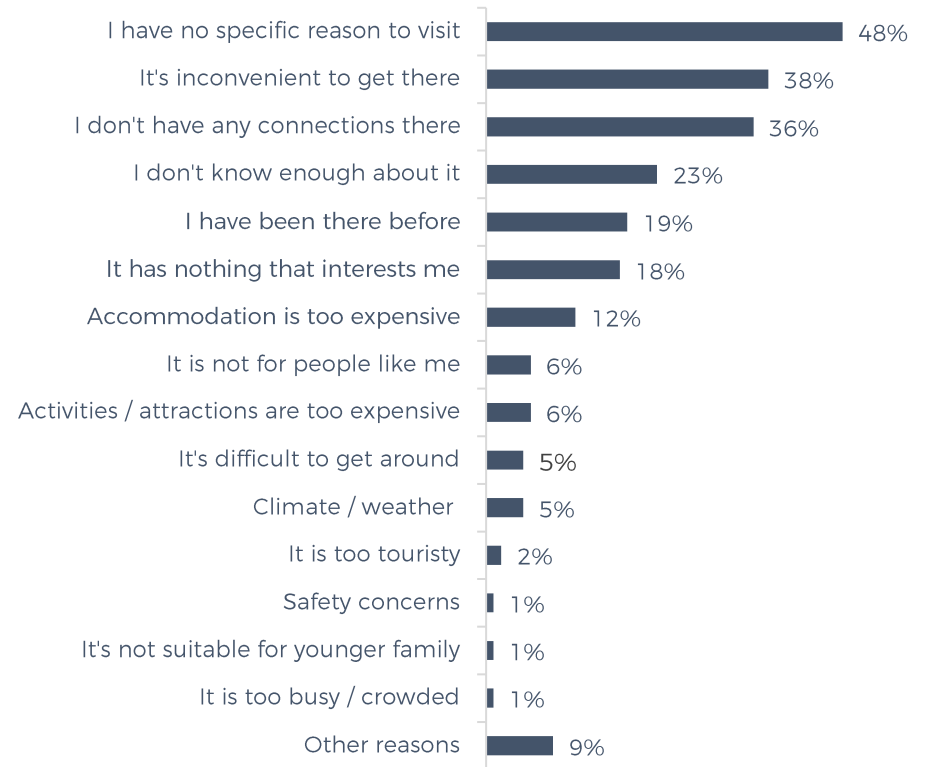


PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (LEISURE)



Base: Intend to travel domestically in next 12 months and have heard of Central Otago, excluding residents (n=1776)

BARRIERS TO VISITING CENTRAL OTAGO



Base: Intend to travel domestically in next 12 months and have heard of Central Otago, but are unlikely to visit (n=400)

FUTURE VISITOR PROFILES



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

Region of Residence	Total Sample (excl. residents) %	'Definitely' will visit Central Otago (Next 12 Months) %
Northland	4	2
Auckland	33	27
Waikato	10	5 ▼
Bay of Plenty	6	6
Tairāwhiti/Gisborne	1	1
Hawke's Bay	4	3
Taranaki	3	1
Manawatu-Whanganui	5	2 ▼
Wellington	11	7
Tasman	1	1
Nelson	2	1
Marlborough	1	1
West Coast	1	1
Canterbury	12	17 ▲
Otago	5	20 ▲
Southland	2	7 ▲
Base:	n=1897	n=178

Age	Total Sample (excl. residents) %	'Definitely' will visit Central Otago (Next 12 Months) %
18-19 years	3	1
20-29 years	18	15
30-39 years	17	19
40-49 years	16	18
50-59 years	17	17
60-69 years	14	13
70+ years	15	18
Household Composition	%	%
My husband, wife or partner	63	72 ▲
My mother and/or father	8	4 ▼
My children aged under 5	11	13
My children aged 5 to 14	17	21
My children aged 15 or older	13	12
Other family/relatives	9	6
Other person(s)	9	8
None of the above - I live alone	12	8
Base:	n=1897	n=178

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

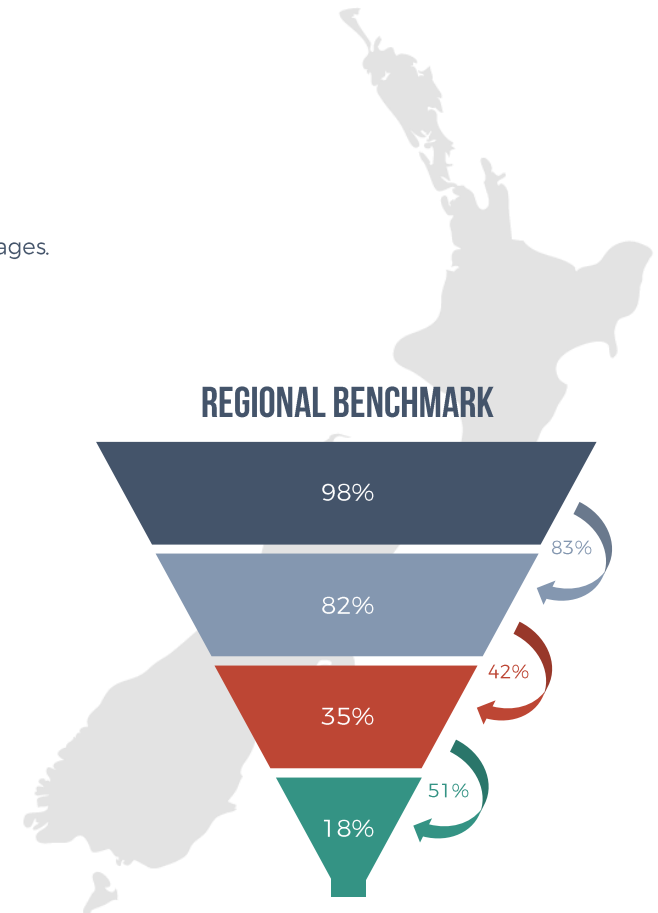
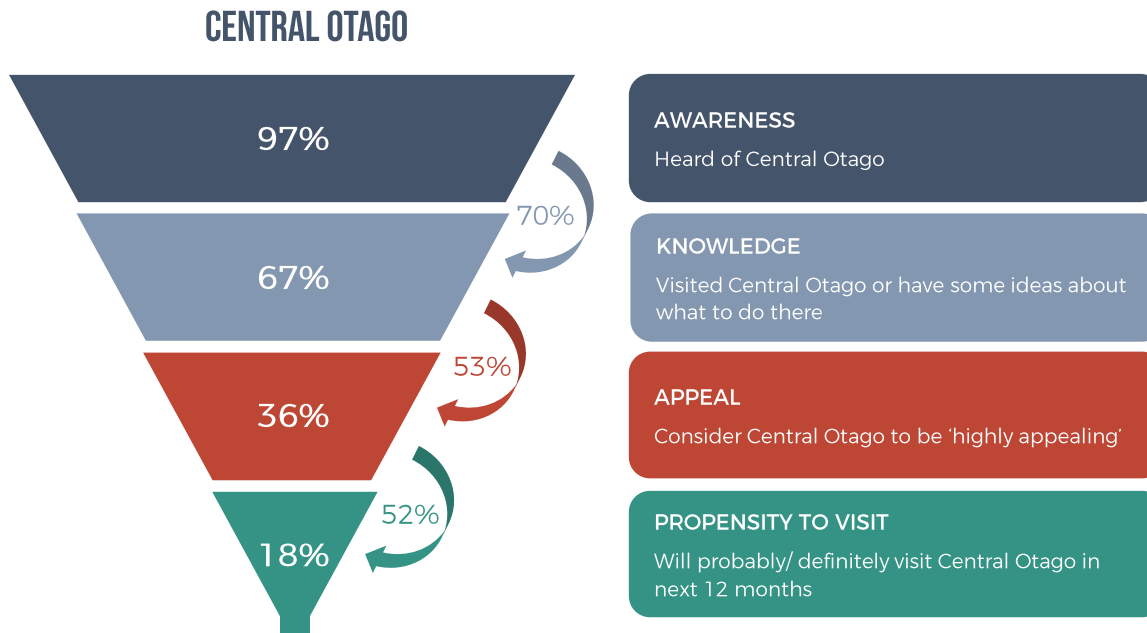
NEW ZEALAND TRAVELLERS

CONVERTING AWARENESS TO VISITATION

The funnel metric below illustrates the path to purchase in the sense that it explores someone's awareness of the destination, the knowledge they have of what to do at the destination, how appealing they find the destination and how likely they are to visit in the future. 97% of New Zealand travellers have heard of Central Otago. Going down the funnel, a new path to purchase measure is added each time. This means that the 18% at the bottom of the funnel represents the proportion of New Zealand travellers who have:

- Heard of Central Otago, and
- Visited Central Otago or have some ideas about what to do there, and
- Consider Central Otago to be highly appealing, and
- Will probably / definitely visit Central Otago in the next 12 months

The smaller numbers on the right hand side of the funnel represent the conversion between each of the stages.



Base: Total sample, excluding residents (n=1899)

A woman wearing a wide-brimmed hat and a light-colored top is seen from behind, walking across 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 'AUSTRALIAN TRAVELLERS'.

**AUSTRALIAN
TRAVELLERS**

AUSTRALIAN TRAVELLERS

CENTRAL OTAGO UPDATE: JULY – DECEMBER 2021

The continued border closure during 2021 has resulted in a very small sample size for the survey answers related to visitation and results should be interpreted with caution. The Trans-Tasman bubble opened from April 19 to June 26 and for a further short period between July 4 and July 23. This has allowed for some responses from people who have visited Central Otago in the past 12 months however numbers are so low they are not statistically valid and have not been included in this report.

Awareness of Central Otago and propensity to visit results should be understood in the context of a locked-out country and the uncertainty of border opening dates. That said, perceptions remain valid and important given the impending reopening of the border.

81% of Australian travellers consider Central Otago to be highly or somewhat appealing which is on par with the regional benchmark.

69% of Australian travellers strongly or somewhat agree that Central Otago is a great place to relax and unwind while 59% see the region as a great place to reconnect with family and friends. Australian travellers associate Central Otago with natural landscapes, walking/hiking and scenic sightseeing. Wineries and cycling/biking do not feature as highly as they do in the domestic market.

Of Australians who intend to travel to New Zealand in the next 12 months, 15% 'definitely will' visit Central Otago. The sample size for barriers to travel to Central Otago is small and results should be treated with caution but the main barrier is no reason to travel or not knowing enough about the region.

Despite the lockdowns and border closure there remains a strong intent among Australian travellers to visit New Zealand in the next 12 months.



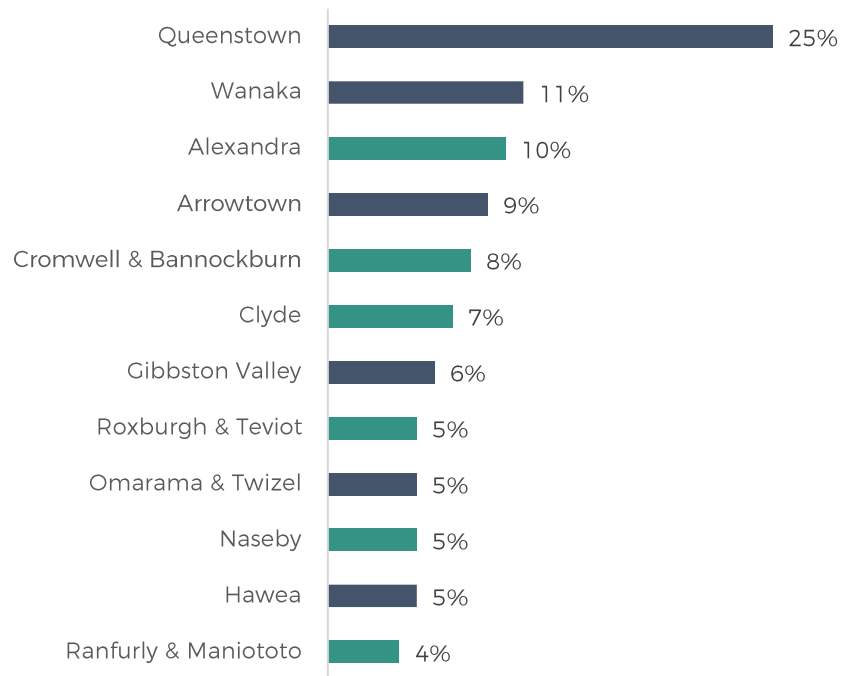
AUSTRALIAN TRAVELLERS

CENTRAL OTAGO ASSOCIATIONS



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

TOP-OF-MIND PLACES



Base: Total sample (n=1839)

MARKET PENETRATION, FAMILIARITY & DESTINATION APPEAL



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

5% of Australians surveyed visited New Zealand in the past 12 months



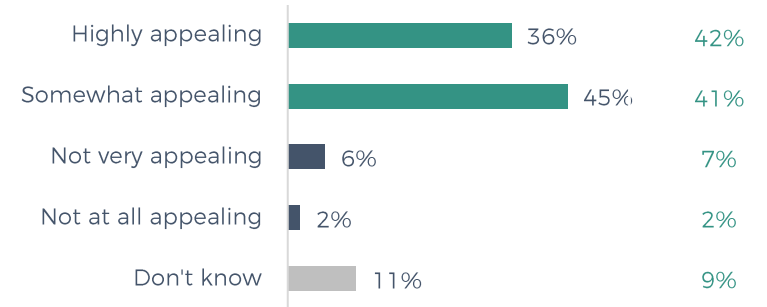
Base: Travelled around NZ in past 12 months. (n=120)

Familiarity	%	Regional Benchmark
I have visited Central Otago	15	26%
I have never visited, but do have some ideas about what you can do there	16	20%
I have never visited, and don't know much about what you can do there	36	31%
I have never heard of Central Otago	34	23%

Base: Total sample (n=1839)

DESTINATION APPEAL (TOTAL SAMPLE)

Regional Benchmark

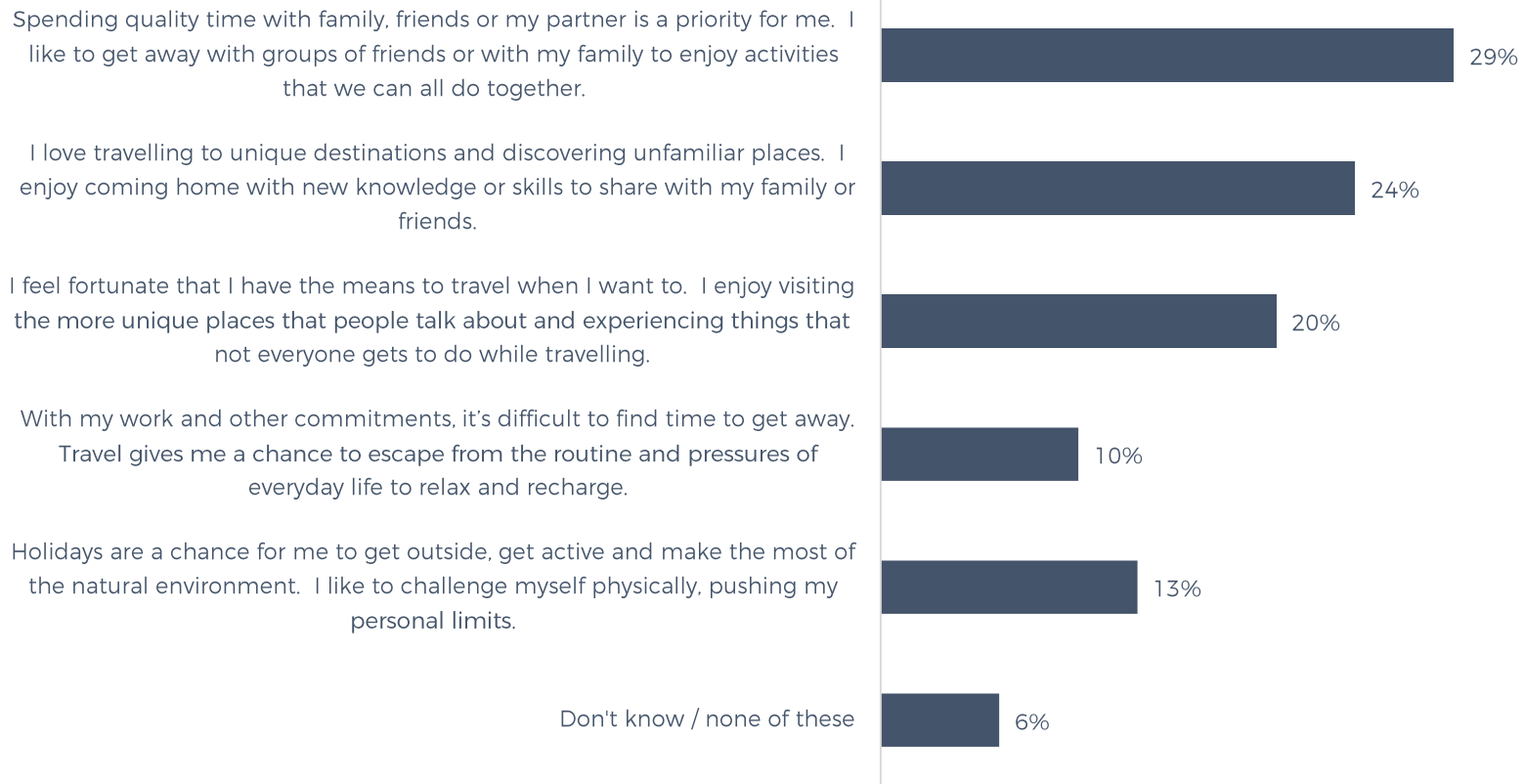


Base: Total sample who have heard of Central Otago (n=1214)

CENTRAL OTAGO VISITOR PROFILES (PERSONAS)



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



AUSTRALIAN TRAVELLERS

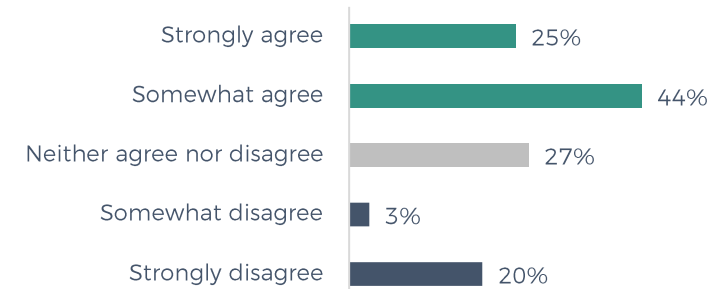
CENTRAL OTAGO POSITIONING



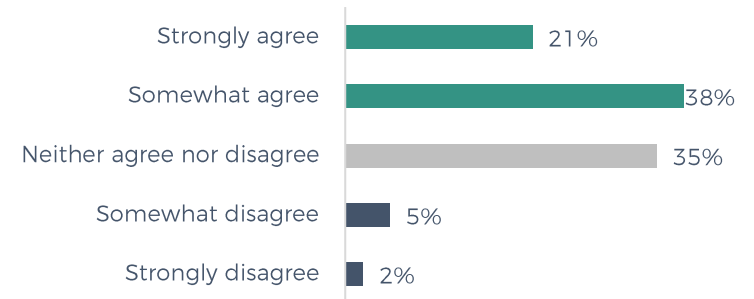
What is the first thing that comes to mind when you think about Central Otago?
To what extent do you agree or disagree with the following statements?



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



Base: Module sample who have heard of Central Otago (n=539)

ACTIVITIES / EXPERIENCES ASSOCIATED WITH CENTRAL OTAGO



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

Top 15 Activities / Experiences	Total Sample
	%
Walking & Hiking	34
Nature, Wildlife & Eco-tourism	30
Scenic Sight-Seeing	24
History & Heritage	23
Gardens, Parks & Reserves	23
Wineries	21
Family Activities	21
Restaurants, Cafés & Bars	19
Cycling/Mountain Biking	18
Māori/Pacific Culture	17
Shopping	16
Golf, Fishing & Hunting	15
Spa & Wellness	15
Arts & Culture	14
Adrenaline Activities	13
Don't know	21
Base:	n=539

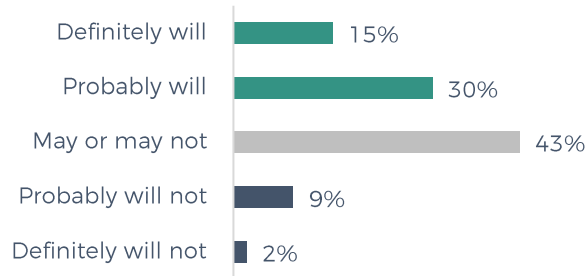
PROPENSITY TO VISIT & BARRIERS TO VISITING



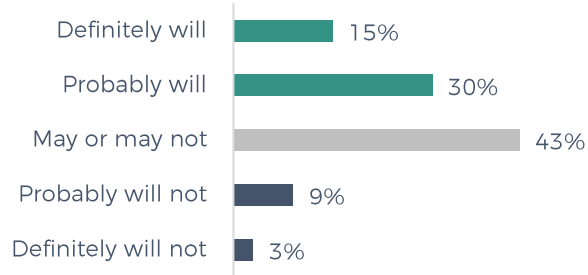
How likely are you to visit Central Otago within the next 12 months? (for any reason / for leisure purposes)
 You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?

38% 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)

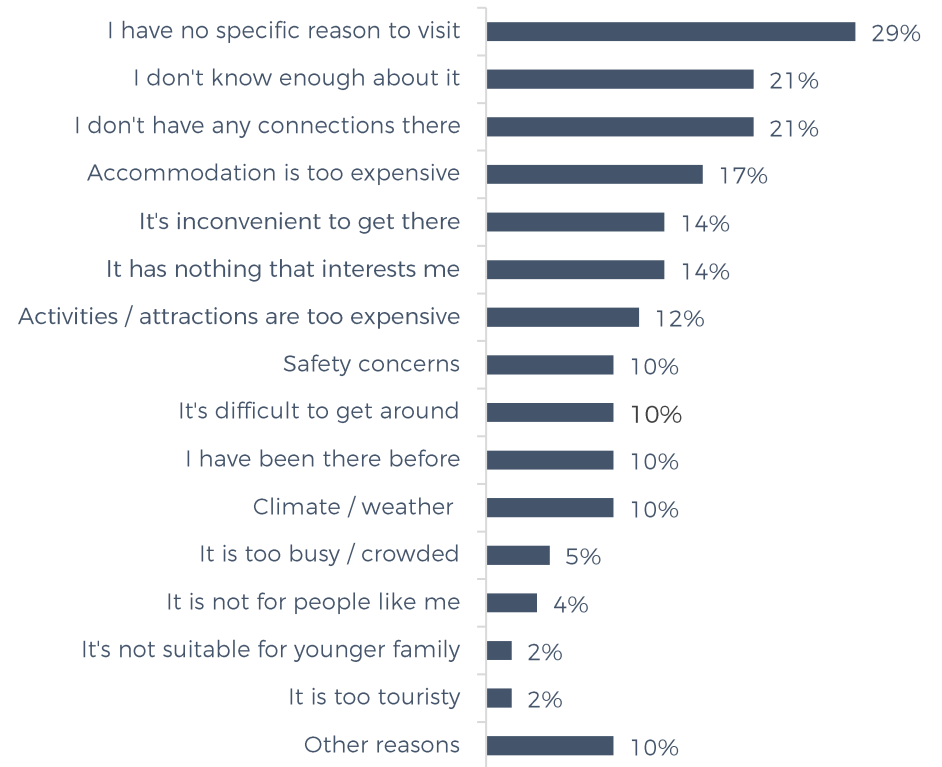


PROPENSITY TO VISIT CENTRAL OTAGO IN NEXT 12 MONTHS (LEISURE)



Base: Intend to travel to NZ in next 12 months and have heard of Central Otago (n=906)

BARRIERS TO VISITING CENTRAL OTAGO



Base: Intend to travel to NZ in next 12 months and have heard of Central Otago, but unlikely to visit (n=42)

AUSTRALIAN TRAVELLERS

FUTURE VISITOR PROFILES



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

	Total Sample	'Definitely' will visit Central Otago (Next 12 Months)
Region of Residence	%	%
Australian Capital Territory	2	4
New South Wales	32	32
Northern Territory	1	2
Queensland	20	17
South Australia	8	7
Tasmania	3	4
Victoria	24	25
Western Australia	10	11
Base:	n=1839	n=133

	Total Sample	'Definitely' will visit Central Otago (Next 12 Months)
Age	%	%
18-19 years	3	2
20-29 years	16	16
30-39 years	18	35 ▲
40-49 years	18	32 ▲
50-59 years	17	11 ▼
60-69 years	14	5 ▼
70+ years	14	1
Household Composition	%	%
My husband, wife or partner	59	62
My mother and/or father	6	5
My children aged under 5	12	21 ▲
My children aged 5 to 14	21	56 ▲
My children aged 15 or older	15	13
Other family/relatives	8	3 ▼
Other person(s)	4	4
None of the above - I live alone	16	5 ▼
Base:	n=1839	n=133

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

AUSTRALIAN TRAVELLERS

CONVERTING AWARENESS TO VISITATION

The funnel metric below illustrates the path to purchase in the sense that it explores someone's awareness of the destination, the knowledge they have of what to do at the destination, how appealing they find the destination and how likely they are to visit in the future. 66% of Australian travellers have heard of Central Otago. Going down the funnel, a new path to purchase measure is added each time. This means that the 9% at the bottom of the funnel represents the proportion of Australian travellers who have:

- Heard of Central Otago, and
- Visited Central Otago or have some ideas about what to do there, and
- Consider Central Otago to be highly appealing, and
- Will probably / definitely visit Central Otago in the next 12 months

The smaller numbers on the right hand side of the funnel represent the conversion between each of the stages.

