

A woman wearing a light-colored hat and a white sweater is walking away from the camera on a suspension bridge. The bridge has wooden planks and ropes. The background is a dense forest with tall trees and green foliage. The entire image has a blue tint.

VISITOR INSIGHTS PROGRAMME

MARKET PERCEPTIONS: CENTRAL OTAGO

YEAR ENDING DECEMBER 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 January – December 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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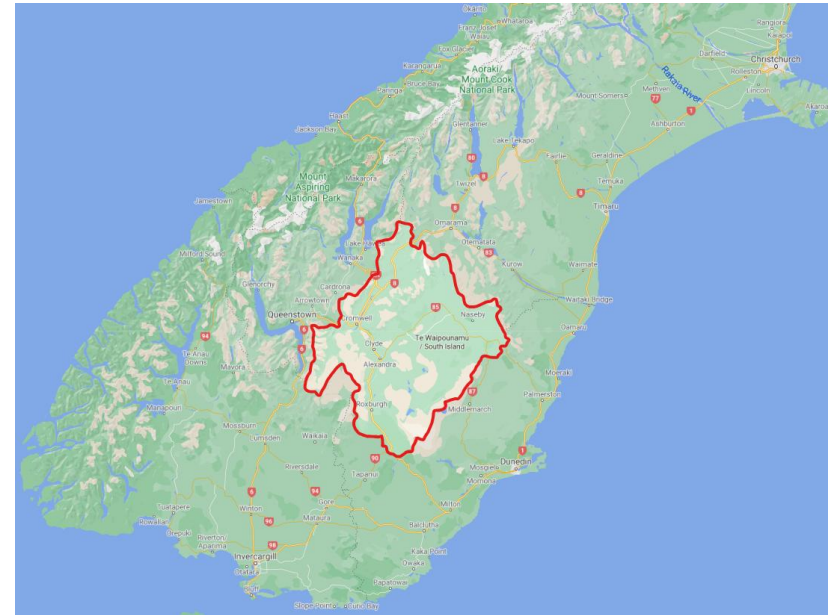
Angus & Associates
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CENTRAL OTAGO

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.



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INSIGHTS



CENTRAL OTAGO INSIGHTS: YEAR ENDING DECEMBER 2025

DOMESTIC TRAVEL MARKET



- The proportions of domestic travellers who associate Queenstown and Wānaka with Central Otago continue to trend downward over time, indicating that the region is increasingly developing its own distinct identity.
- Almost seven in ten New Zealanders have travelled within New Zealand in the last 12 months (69%), with 7% of domestic travellers visiting Central Otago. This percentage has declined from a high of 10% recorded in the year to December 2022, during which domestic tourism activity was heightened post-COVID. The proportion of recent domestic travellers staying overnight has also decreased over the last four years, from 6% to the current 4%.
- The largest groups of Central Otago's recent visitors originate from South Island towns or cities, with other parts of the Otago region being the largest individual source market (24% of visitors in the last 12 months). North Island markets account for a higher proportion of intending than actual visitors, indicating that some barriers may exist to conversion.
- 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). This proportion has grown steadily over time, from 28% in the year ending December 2022 to the current 34%.
- Top-of-mind associations with Central Otago are beautiful scenery, wine, fruit and cold temperatures. As to specific activities/experiences, Central Otago is most strongly associated with walking and hiking, scenic sight-seeing, wineries/breweries/distilleries, history and heritage, nature, wildlife and eco-tourism, and cycling/mountain biking. Central Otago's association with wineries/breweries/distilleries is a key point of **differentiation**.
- Central Otago is highly appealing as a destination for the domestic travel market, and out-performs the regional benchmark in this respect. This is also reflected in Central Otago's Net Promoter Score (NPS) which, at +12 amongst past visitors and +38 amongst recent visitors, is considerably higher than the regional benchmarks of -8 and +11 respectively.
- 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 DECEMBER 2025

AUSTRALIAN TRAVEL MARKET



- Large numbers of Australian travellers continue to associate Queenstown and Wānaka with Central Otago. This suggests that, while the District is making inroads in forging its own identity in the domestic market, it has yet to do so to the same extent in the Australian market.
- 10% of Australians who travelled to New Zealand in the past 12 months visited Central Otago on their trip and half (5%) stayed overnight. Both proportions have increased steadily over the last four years.
- 28% of the Australian traveler 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 (65%) is higher than the average of 58% for other New Zealand regions.
- Those aware of Central Otago most often associate it with beautiful scenery, mountains, and wine. The activities/experiences most often associated with the District are walking and hiking, nature, wildlife and eco-tourism, scenic sight-seeing and history and heritage. Interestingly, while fewer Australian travellers associate the District with cycling/mountain-biking, this is a clear point of differentiation. Family activities and fishing or hunting also set Central Otago apart from other regions.
- Central Otago is highly appealing to almost 40% of Australian travelers who are aware of the region, and almost 60% of recent visitors. However, compared with the regional benchmark, a smaller proportion of recent visitors rate the District as ‘highly’ appealing – suggesting there may be some disconnect between expectation and experience.
- Two thirds (66%) of Australian travellers planning to visit New Zealand in the next 12 months, say that they intend to visit Central Otago. This proportion has grown significantly over time, from 44% in the year ending December 2022 to the current 66%.
- The profile of prospective Australian visitors to Central Otago skews younger (20-39 years) compared to the total market.
- As in the domestic market, Central Otago is converting awareness into propensity to visit at a rate comparable to the regional benchmark for the Australian travel market. The main barriers to visiting Central Otago are a lack of local connections and a perception that the District has nothing of interest to offer. Other barriers of note are perceptions that it is inconvenient to get to Central Otago, that it is too touristy, and that it is too busy/crowded.



- 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 45. 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 28% of the Australian traveler market).
- While this persona is also prominent amongst Central Otago’s domestic visitors, ‘indulge’ travellers make up 27% of recent domestic travellers to the district. The ‘indulge’ segment is also prominent amongst recent Australian travellers to Central Otago (31%), along with the ‘explore and discover’ persona (25%).
- The ‘indulge’ and ‘explore and discover’ personas give the highest Net Promotor Scores for Central Otago, at +25 and +29 respectively.
- Travelers in the ‘indulge’ segment are most likely to have visited Central Otago and, along with the ‘explore and discover’ persona, are most likely to find the district highly appealing.
- The ‘escape and relax’ persona is the least likely to find Central Otago ‘highly appealing’ and the least likely to express an intention to visit Central Otago in the next 12 months. This suggests that the proposition of ‘a holiday in Central Otago (being) an opportunity to slow down and relax’ may not be resonating with this group.

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 dark blue tint. A large white circle is positioned on the left side of the image.

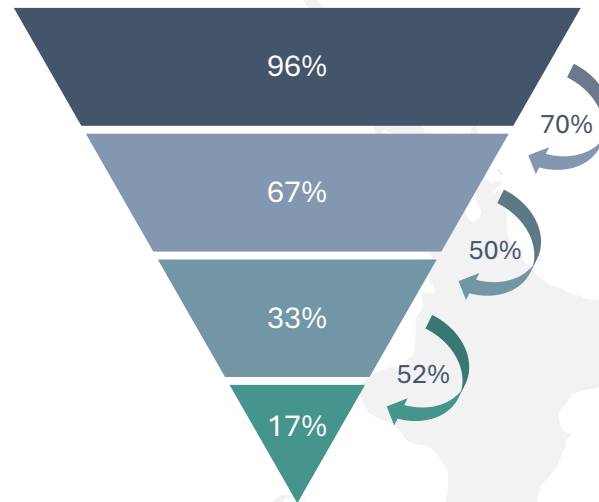
SNAPSHOT

CENTRAL OTAGO SNAPSHOT: YEAR ENDING DECEMBER 2025

DOMESTIC TRAVEL MARKET



CENTRAL OTAGO



AWARENESS	Heard of Central Otago
FAMILIARITY	Visited or know what there is to do
APPEAL	Highly appealing destination
INTENT TO VISIT	Likely to visit in next 12 months



Domestic travellers associate Central Otago with...

- Walking & Hiking (50%)
- Scenic Sightseeing (41%)
- Wineries, Breweries or Distilleries (40%)
- History & Heritage (39%)
- Nature, Wildlife & Eco-tourism (39%)

75%

of domestic travellers who have heard of Central Otago agree that a holiday there is an opportunity to slow down and relax

59%

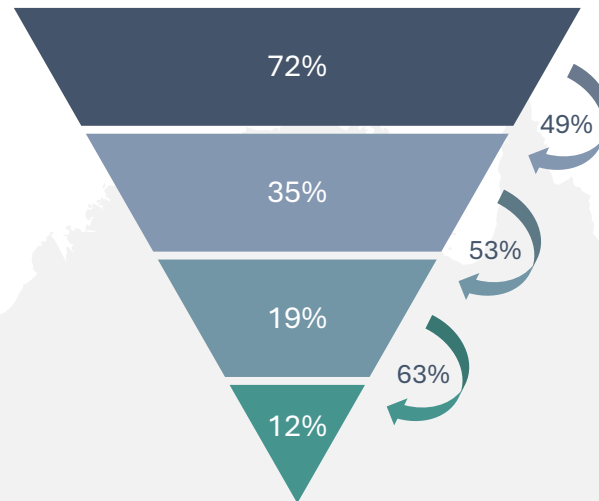
of domestic travellers who have heard of Central Otago agree that it is an ideal place to reconnect with friends and family

CENTRAL OTAGO SNAPSHOT: YEAR ENDING DECEMBER 2025

AUSTRALIAN TRAVEL MARKET



CENTRAL OTAGO



AWARENESS
Heard of Central Otago
FAMILIARITY
Visited or know what there is to do
APPEAL
Highly appealing destination
INTENT TO VISIT
Likely to visit in next 12 months



Australian travellers associate Central Otago with...

- Walking & Hiking (42%)
- Nature, Wildlife & Eco-tourism (36%)
- Scenic Sightseeing (31%)
- History & Heritage (28%)
- Gardens, Parks & Reserves (25%)

74%

of Australian travellers who have heard of Central Otago agree that a holiday there is an opportunity to slow down and relax

64%

of Australian travellers who have heard of Central Otago agree that it is an ideal place to reconnect with friends and family

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 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 gradual reduction in the association of Queenstown and Wanaka with Central Otago over the last four years.

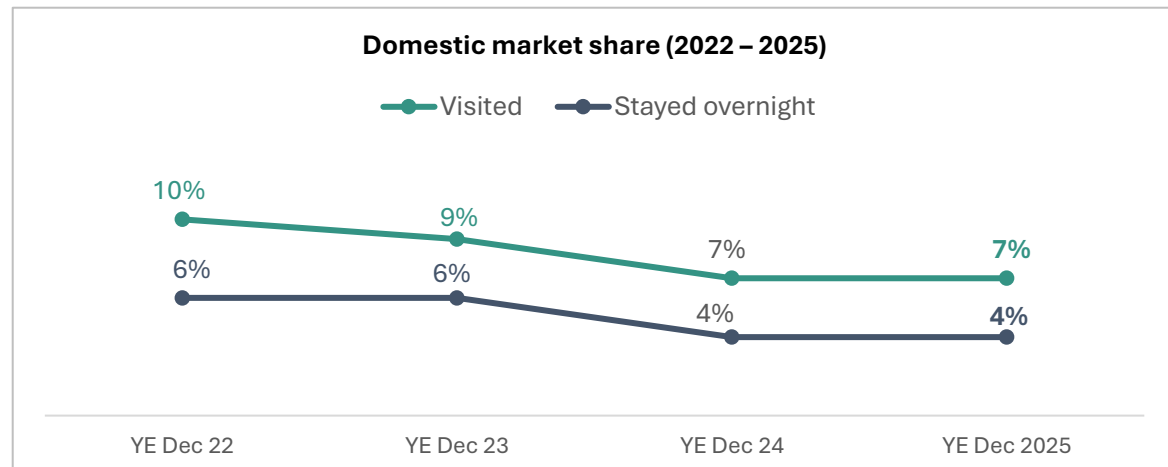
	YE Dec 2022	YE Dec 2023	YE Dec 2024	YE Dec 2025
Queenstown	52%	49%	48%	47%
Alexandra	40%	39%	39%	40%
Arrowtown	40%	37%	35%	37%
Wānaka	43%	38%	37%	36%
Cromwell & Bannockburn	35%	35%	35%	35%
Clyde	26%	26%	26%	27%
Roxburgh & Teviot	17%	16%	16%	17%
Gibbston Valley	15%	13%	13%	13%
Omarama & Twizel	15%	14%	13%	12%
Ranfurly & Maniototo	12%	12%	11%	12%
Naseby	12%	12%	11%	12%
Hawea	9%	9%	9%	10%
Base: Total sample, excl. residents (n=)	3,759	3,753	3,622	3,587

TOURISM MARKET SHARE

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



Base: Total Sample (YE Dec 25) - NZ Domestic Travellers (travelled within NZ in past 12 months), excl. Central Otago Residents (n=3,172)



RECENT VISITOR PROFILE



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

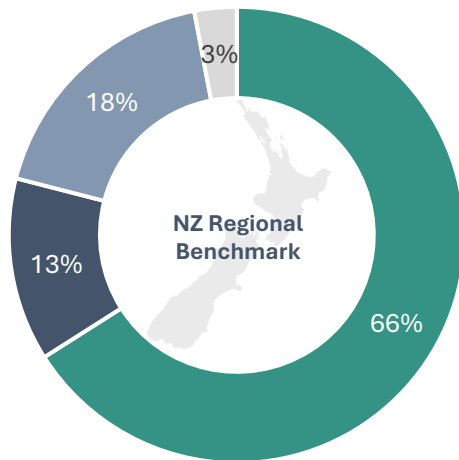
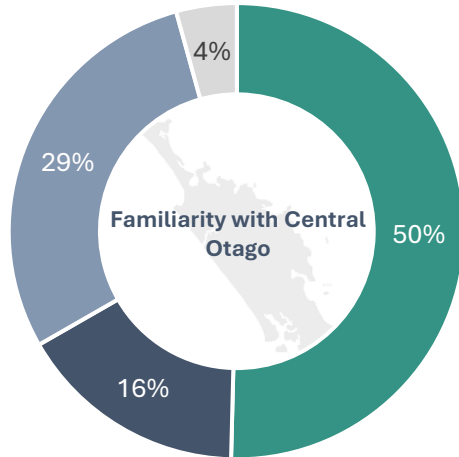
	Total Sample	Recent Visitors
Region of Residence		
Northland	4%	2% ▼
Auckland	34%	18% ▼
Waikato	10%	3% ▼
Bay of Plenty	6%	1% ▼
Tairāwhiti / Gisborne	1%	1%
Hawke's Bay	5%	1% ▼
Taranaki	3%	0% ▼
Manawatū-Whanganui	5%	3%
Wellington (& Wairarapa)	11%	9%
Tasman	1%	1%
Nelson	2%	2%
Marlborough	1%	2%
West Coast	1%	2%
Canterbury	13%	23% ▲
Otago	5%	24% ▲
Southland	2%	8% ▲
North Island (NET)	79%	38% ▼
South Island (NET)	21%	62% ▲

	Total Sample	Recent Visitors
Age		
18-19 years	4%	3%
20-29 years	18%	16%
30-39 years	17%	15%
40-49 years	17%	12% ▼
50-59 years	17%	20%
60-69 years	13%	14%
70+ years	14%	20% ▲
Household Composition		
My husband, wife or partner	58%	68% ▲
My mother and/or father	7%	5%
My children aged under 5	11%	8%
My children aged 5 to 14	18%	14%
My children aged 15 or older	14%	12%
Other family/relatives	9%	6%
Other person(s)	7%	6%
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

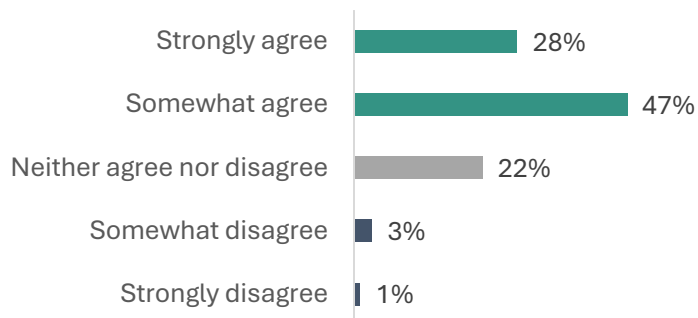


POSITIONING

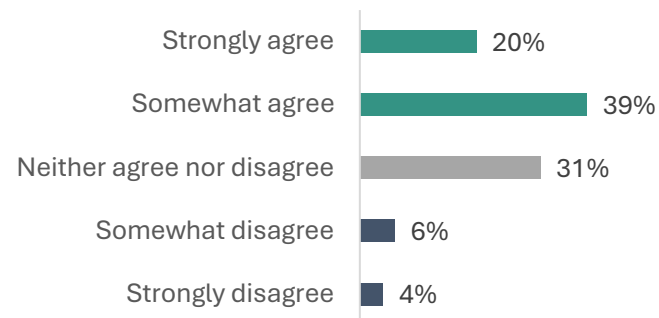
To what extent do you agree or disagree with each of the following statements?



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



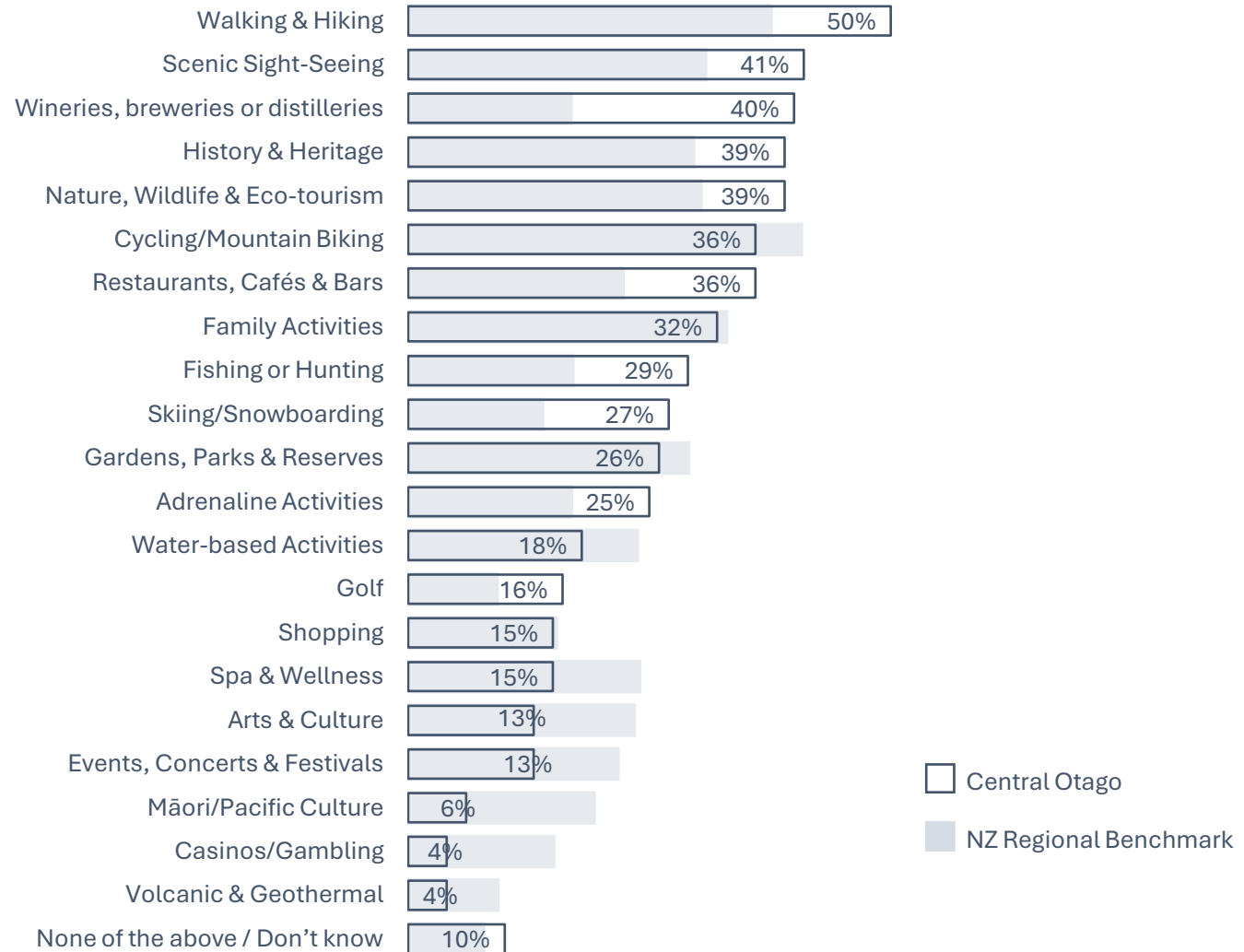
	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Strongly agree	25%	29%	26%	28%
Somewhat agree	46%	45%	49%	47%
Neither agree nor disagree	24%	21%	22%	22%
Somewhat disagree	4%	3%	3%	3%
Strongly disagree	1%	1%	1%	1%
Base: Heard of Central Otago, excluding residents (n=)	1,554	2,053	2,278	1,966

	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Strongly agree	18%	21%	17%	20%
Somewhat agree	34%	37%	39%	39%
Neither agree nor disagree	36%	32%	34%	31%
Somewhat disagree	8%	7%	7%	6%
Strongly disagree	4%	3%	3%	4%
Base: Heard of Central Otago, excluding residents (n=)	1,554	2,053	2,278	1,966

ACTIVITIES / EXPERIENCES



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



ACTIVITIES / EXPERIENCES

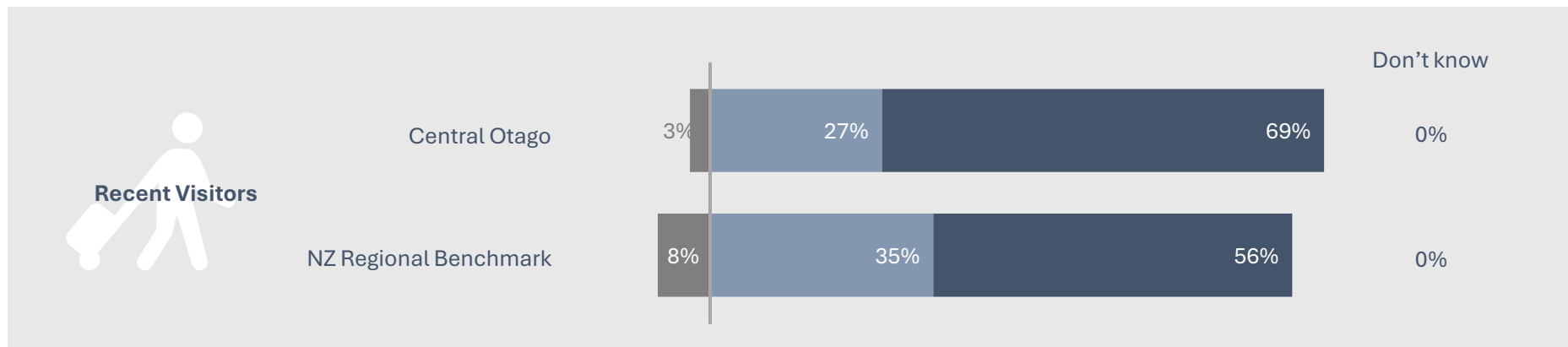
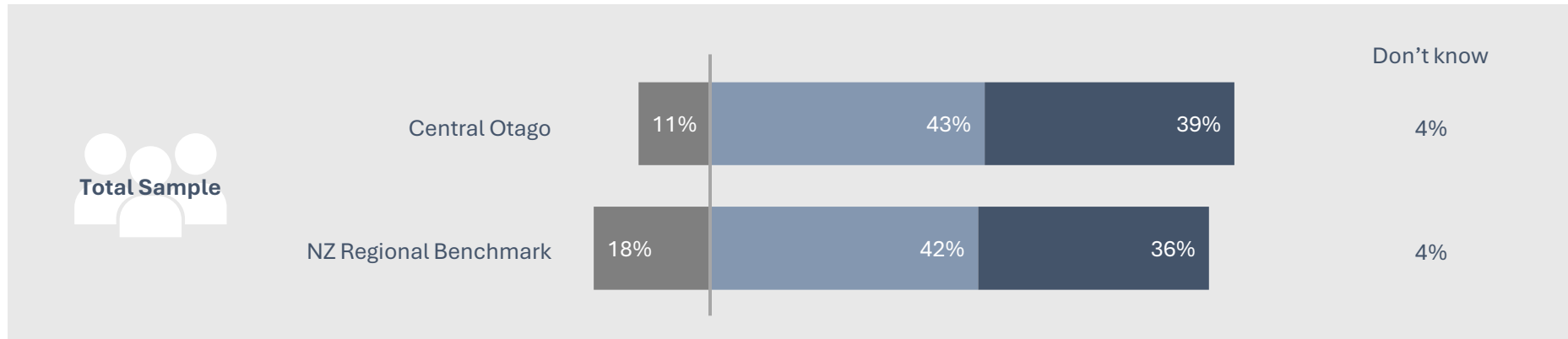


Which, if any, of the following activities or experiences do you associate with Central Otago?

	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Walking & Hiking	47%	50%	53%	50%
Scenic Sight-Seeing	34%	39%	39%	41%
Wineries, breweries or distilleries*	-	39%	40%	40%
History & Heritage	34%	34%	37%	39%
Nature, Wildlife & Eco-tourism	34%	39%	38%	39%
Restaurants, Cafés & Bars	32%	35%	35%	36%
Cycling/Mountain Biking	36%	38%	40%	36%
Family Activities	29%	32%	30%	32%
Fishing or Hunting*	-	29%	30%	29%
Skiing/Snowboarding	21%	23%	25%	27%
Gardens, Parks & Reserves	24%	26%	27%	26%
Adrenaline Activities	22%	24%	23%	25%
Water-based Activities	16%	17%	18%	18%
Golf*	-	15%	15%	16%
Shopping	12%	15%	14%	15%
Spa & Wellness	10%	11%	12%	15%
Events, Concerts & Festivals	13%	13%	14%	13%
Arts & Culture	10%	12%	12%	13%
Māori/Pacific Culture	5%	6%	5%	6%
Volcanic & Geothermal	3%	4%	4%	4%
Casinos/Gambling	4%	4%	4%	4%
Don't know/None of the above	17%	14%	12%	10%
Base: Module sample (n=)	1,554	2,055	2,278	1,966

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	YE Dec 25
Highly Appealing	41%	42%	39%	39%
Somewhat Appealing	38%	40%	41%	43%
Not very Appealing	12%	11%	12%	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=)	3,625	3,611	3,469	3,433

	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Highly Appealing	78%	77%	78%	69%
Somewhat Appealing	20%	20%	20%	27%
Not very Appealing	1%	2%	2%	3%
Not at all Appealing	0%	0%	0%	0%
Don't know/NA	0%	0%	0%	0%
Base: Visited Central Otago P12M (n=)	348	302	227	235

NET PROMOTOR SCORE (NPS)

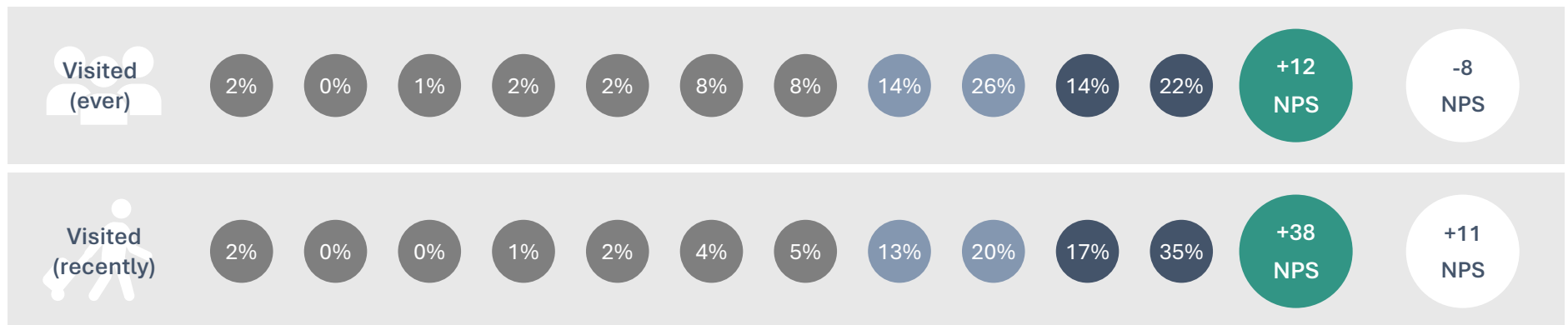
DOMESTIC TRAVEL MARKET



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

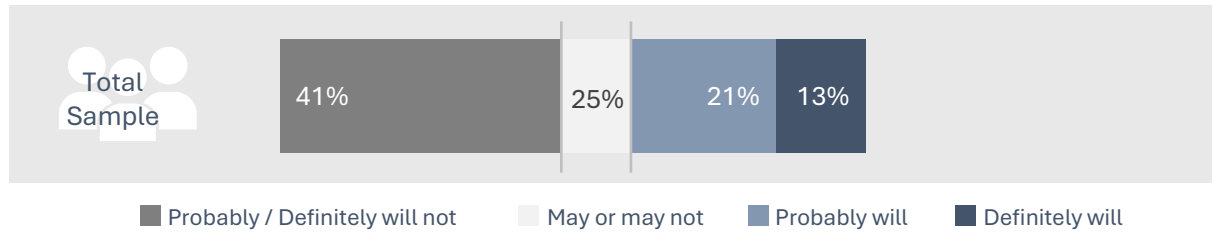


PROPENSITY TO VISIT

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



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=2,836)

	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Definitely will	11%	10%	12%	13%
Probably will	17%	19%	20%	21%
May or may not	27%	29%	27%	25%
Probably / Definitely will not	45%	41%	41%	41%
Base: (n=)	3,541	3,517	2,877	2,836

PROSPECTIVE VISITOR PROFILE

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



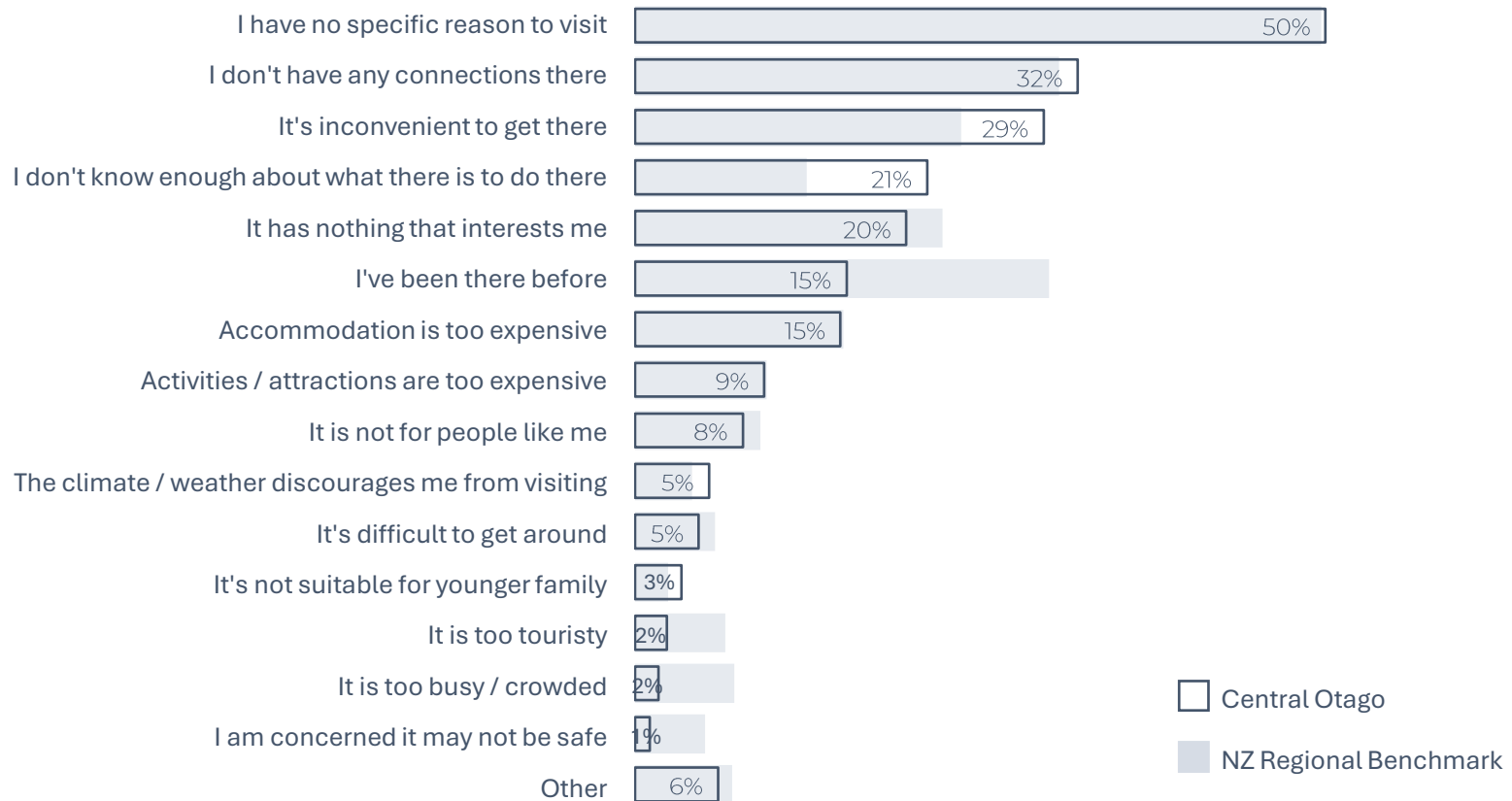
	Total Sample	Prospective Visitors
Region of Residence		
Northland	4%	3%
Auckland	34%	29% ▼
Waikato	10%	9%
Bay of Plenty	6%	4%
Tairāwhiti / Gisborne	1%	1%
Hawke's Bay	5%	2% ▼
Taranaki	3%	1% ▼
Manawatū-Whanganui	5%	2% ▼
Wellington (& Wairarapa)	11%	7% ▼
Tasman	1%	0% ▼
Nelson	2%	1%
Marlborough	1%	1%
West Coast	1%	0% ▼
Canterbury	13%	21% ▲
Otago	5%	15% ▲
Southland	2%	4% ▲
North Island (NET)	79%	58% ▼
South Island (NET)	21%	42% ▲

	Total Sample	Prospective Visitors
Age		
18-19 years	4%	2% ▼
20-29 years	18%	17%
30-39 years	17%	21%
40-49 years	17%	16%
50-59 years	17%	15%
60-69 years	13%	11%
70+ years	14%	17%
Household Composition		
My husband, wife or partner	58%	67% ▲
My mother and/or father	7%	5%
My children aged under 5	11%	9%
My children aged 5 to 14	18%	19%
My children aged 15 or older	14%	12%
Other family/relatives	9%	5% ▼
Other person(s)	7%	5%
None of the above – I live alone	16%	12% ▼

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

BARRIERS TO VISITING

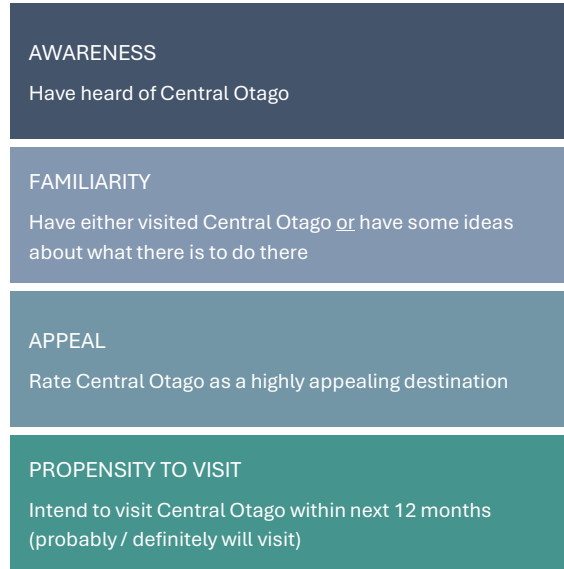
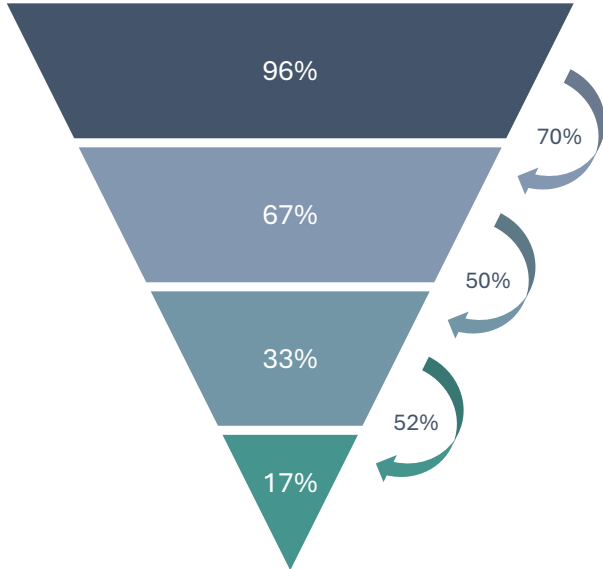
You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?



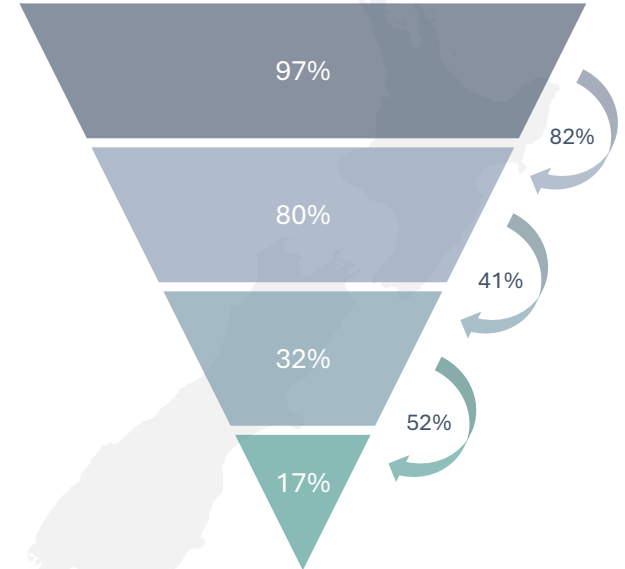
CONVERTING AWARENESS TO VISITATION



CENTRAL OTAGO (YE DEC 2025)



NZ REGIONAL BENCHMARK



	YE Dec 2022	YE Dec 2023	YE Dec 2024
Awareness	96%	96%	96%
Familiarity	66%	67%	66%
Appeal	34%	35%	34%
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 is overlaid with a semi-transparent dark blue filter. On the left side, there is a large white circle containing the text 'AUSTRALIAN TRAVEL MARKET'.

**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 Wānaka and Arrowtown, continues to be commonly associated with Central Otago.

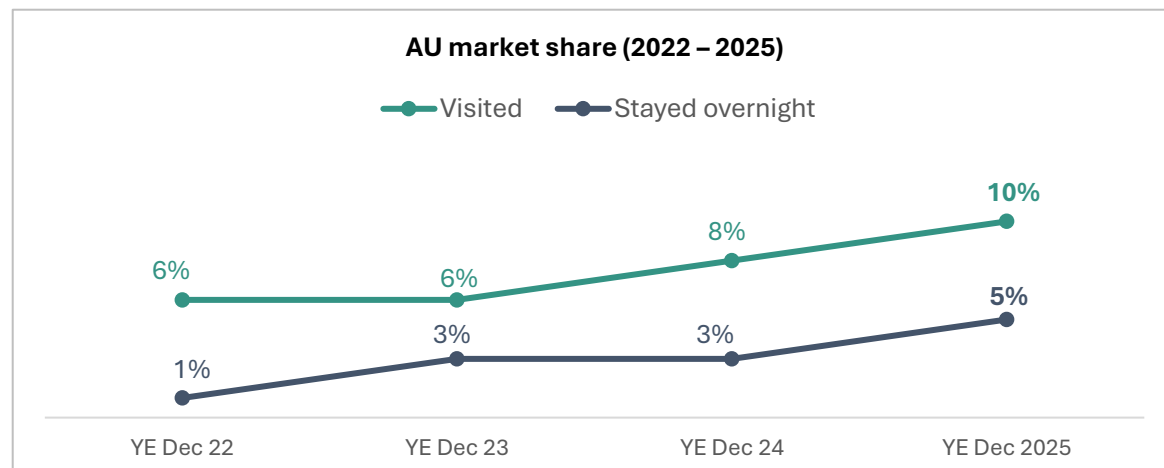
	YE Dec 2022	YE Dec 2023	YE Dec 2024	YE Dec 2025
Queenstown	26%	28%	30%	30%
Wānaka	11%	11%	12%	12%
Arrowtown	7%	7%	8%	11%
Alexandra	7%	7%	8%	10%
Cromwell & Bannockburn	6%	6%	7%	9%
Clyde	5%	6%	7%	9%
Gibbston Valley	4%	5%	5%	6%
Omarama & Twizel	4%	4%	5%	5%
Naseby	3%	3%	3%	5%
Hawea	3%	3%	4%	5%
Roxburgh & Teviot	4%	3%	3%	4%
Ranfurlly & Maniototo	3%	3%	4%	4%
Base: Total sample	3,741	3,737	3,633	3,621

TOURISM MARKET SHARE

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



Base: Total Sample (YE Dec 25) - AU Travellers Visited NZ in Past 12 Months (n=697)



RECENT VISITOR PROFILE

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



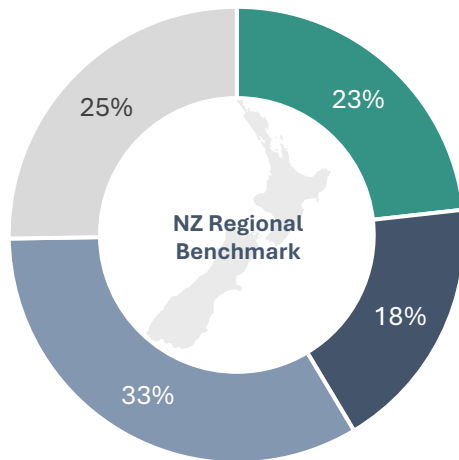
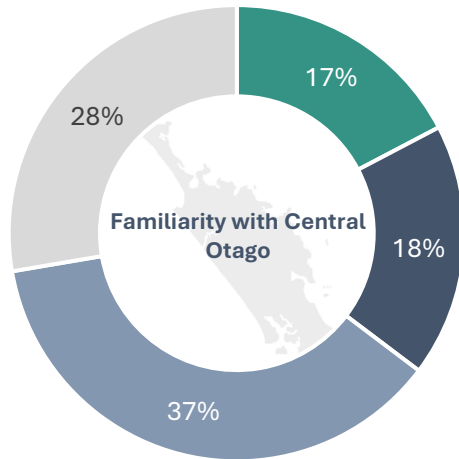
	Total Sample	Recent Visitors
Region of Residence		
Australian Capital Territory	2%	7%
New South Wales	31%	24%
Northern Territory	1%	6%
Queensland	20%	19%
South Australia	7%	4%
Tasmania	3%	1%
Victoria	26%	30%
Western Australia	10%	7%

	Total Sample	Recent Visitors
Age		
18-19 years	3%	4%
20-29 years	17%	24%
30-39 years	19%	25%
40-49 years	16%	22%
50-59 years	16%	7%
60-69 years	15%	10%
70+ years	14%	6% ▼
Household Composition		
My husband, wife or partner	59%	67%
My mother and/or father	6%	10%
My children aged under 5	11%	19%
My children aged 5 to 14	20%	37% ▲
My children aged 15 or older	16%	12%
Other family/relatives	7%	3%
Other person(s)	5%	3%
None of the above – I live alone	17%	13%

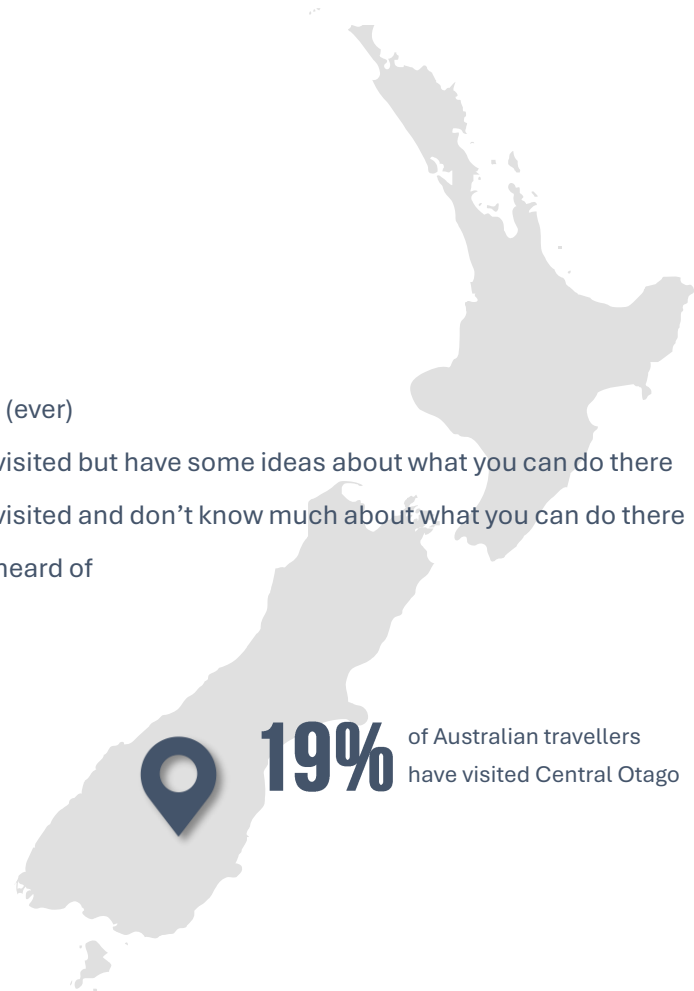
▲ / ▼ Significantly higher or lower than total sample at 95% confidence

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

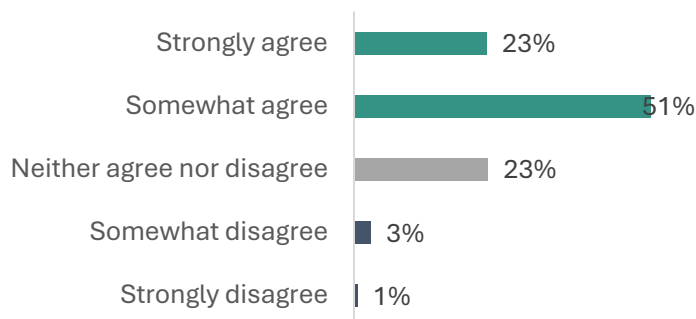


POSITIONING

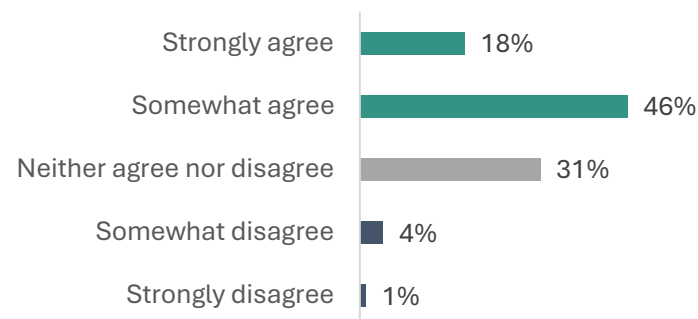
To what extent do you agree or disagree with each of the following statements?



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

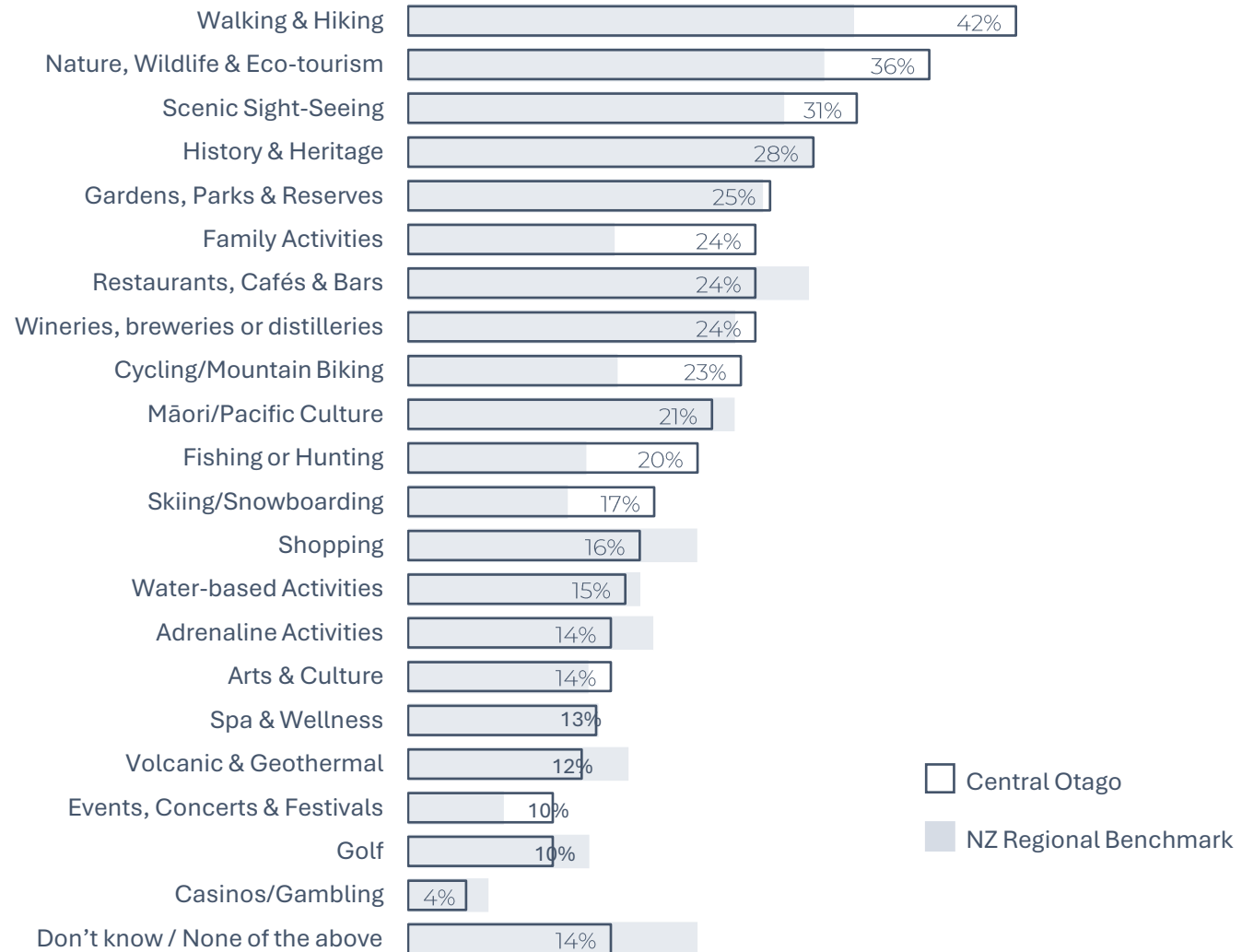


	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Strongly agree	23%	23%	23%	23%
Somewhat agree	47%	50%	51%	51%
Neither agree nor disagree	27%	25%	24%	23%
Somewhat disagree	2%	2%	2%	3%
Strongly disagree	1%	0%	1%	1%
Base: Heard of Central Otago (n=)	1,224	1,821	1,899	1,599

	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Strongly agree	17%	17%	18%	18%
Somewhat agree	42%	42%	44%	46%
Neither agree nor disagree	34%	35%	32%	31%
Somewhat disagree	4%	4%	4%	4%
Strongly disagree	2%	2%	2%	1%
Base: Heard of Central Otago (n=)	1,224	1,821	1,899	1,599

ACTIVITIES / EXPERIENCES

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



ACTIVITIES / EXPERIENCES

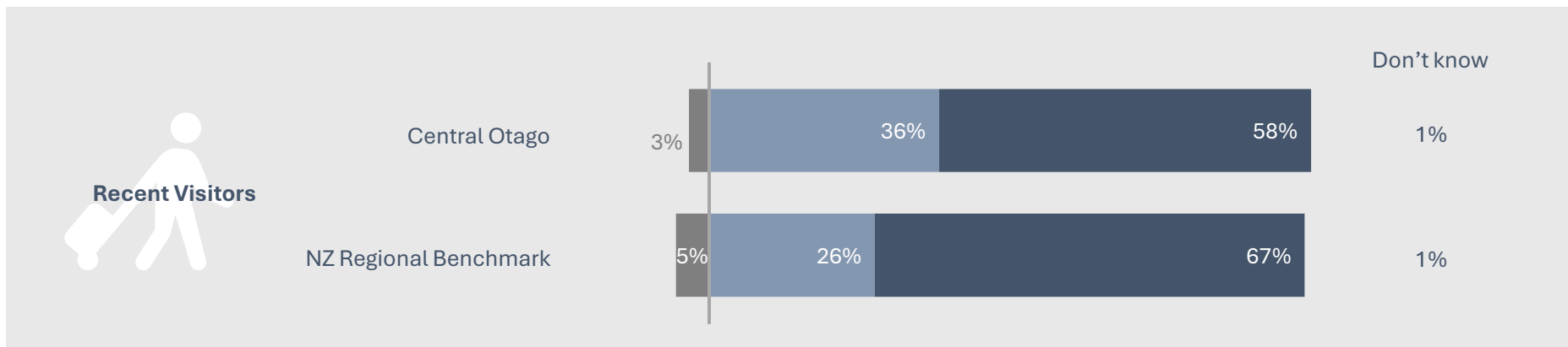
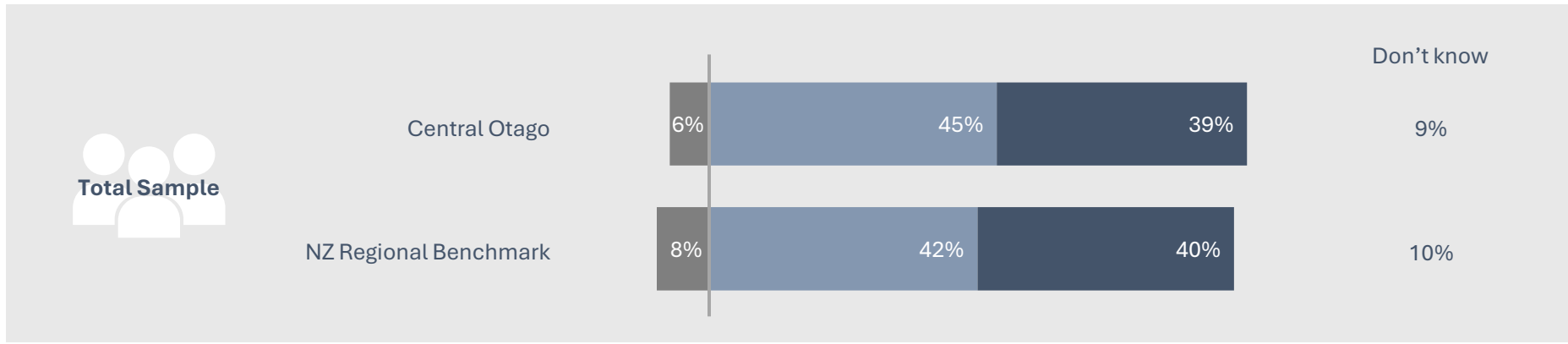
Which, if any, of the following activities or experiences do you associate with Central Otago?



	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Walking & Hiking	31%	36%	38%	42%
Nature, Wildlife & Eco-tourism	31%	33%	35%	36%
Scenic Sight-Seeing	23%	27%	29%	31%
History & Heritage	23%	26%	28%	28%
Gardens, Parks & Reserves	21%	23%	25%	25%
Restaurants, Cafés & Bars	19%	21%	23%	24%
Wineries, breweries or distilleries*	-	20%	23%	24%
Family Activities	21%	21%	25%	24%
Cycling/Mountain Biking	19%	19%	22%	23%
Māori/Pacific Culture	19%	18%	21%	21%
Fishing or Hunting*	-	18%	19%	20%
Skiing/Snowboarding	11%	12%	15%	17%
Shopping	15%	14%	16%	16%
Water-based Activities	10%	11%	14%	15%
Arts & Culture	14%	13%	13%	14%
Adrenaline Activities	12%	14%	14%	14%
Spa & Wellness	10%	12%	13%	13%
Volcanic & Geothermal	12%	12%	13%	12%
Golf*	-	8%	9%	10%
Events, Concerts & Festivals	8%	9%	9%	10%
Casinos/Gambling	5%	5%	4%	4%
Don't know/None of the above	26%	22%	20%	14%
Base: Module sample (n=)	1,252	1,863	1,899	1,599

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?



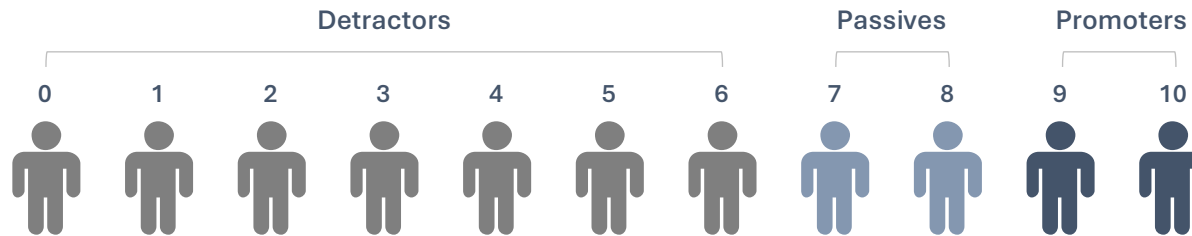
	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Highly Appealing	37%	38%	42%	39%
Somewhat Appealing	45%	45%	42%	45%
Not very Appealing	6%	6%	6%	6%
Not at all Appealing	1%	1%	2%	1%
Don't know/NA	10%	10%	9%	9%
Base: Heard of Central Otago (n=)	2,401	2,572	2,621	2,619

NET PROMOTOR SCORE (NPS)

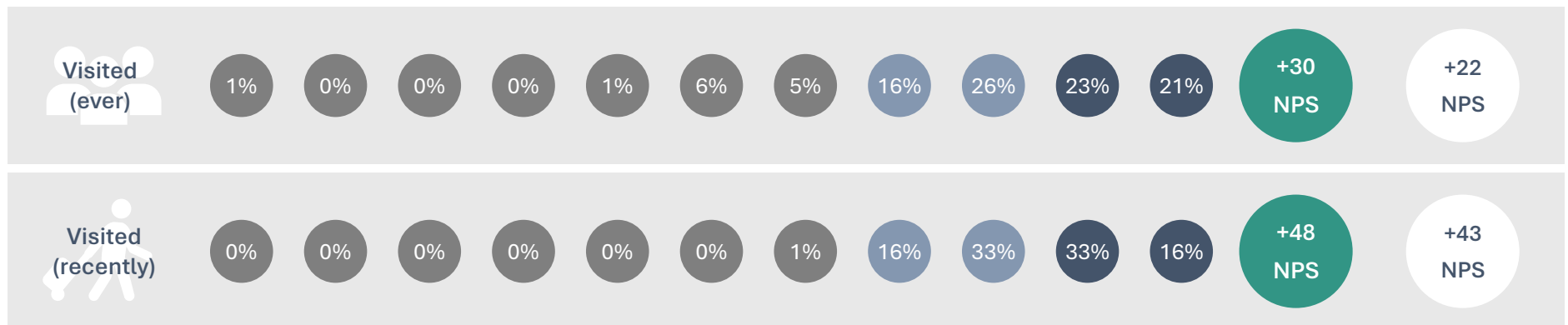
AUSTRALIAN TRAVEL MARKET



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

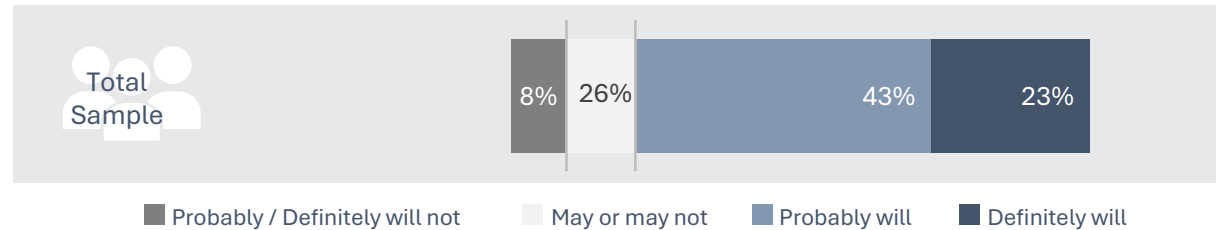


PROPENSITY TO VISIT

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



66% 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=1,283)

	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Definitely will	14%	13%	19%	23%
Probably will	30%	31%	44%	43%
May or may not	43%	42%	27%	26%
Probably / Definitely will not	13%	14%	10%	8%
Base: (n=)	1,794	1,950	1,194	1,283

PROSPECTIVE VISITOR PROFILE

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



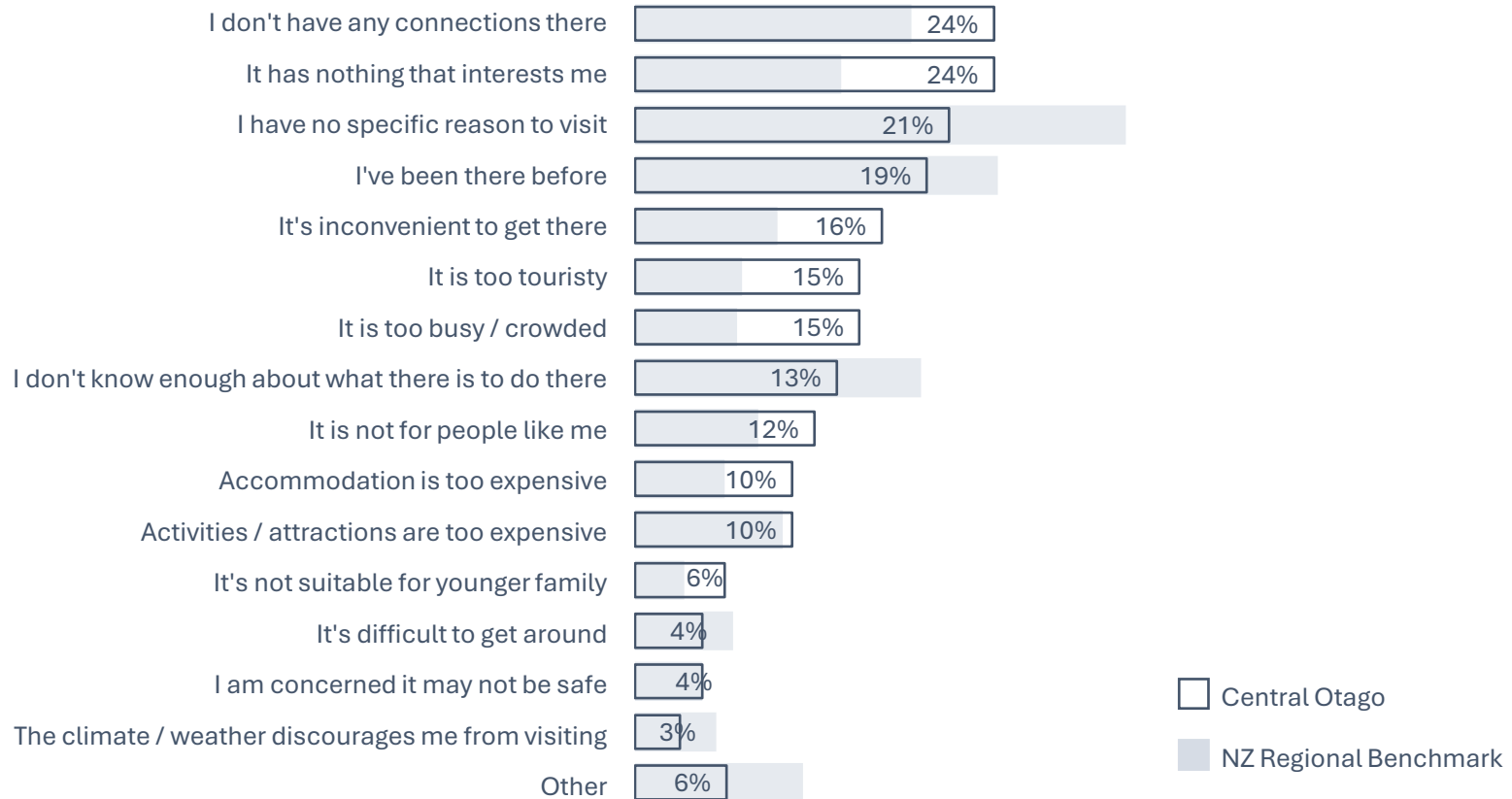
	Total Sample	Prospective Visitors
Region of Residence		
Australian Capital Territory	2%	6% ▲
New South Wales	31%	32%
Northern Territory	1%	3% ▲
Queensland	20%	16%
South Australia	7%	6%
Tasmania	3%	3%
Victoria	26%	22%
Western Australia	10%	11%

	Total Sample	Prospective Visitors
Age		
18-19 years	3%	1% ▼
20-29 years	17%	27% ▲
30-39 years	19%	30% ▲
40-49 years	16%	15%
50-59 years	16%	14%
60-69 years	15%	7% ▼
70+ years	14%	5% ▼
Household Composition		
My husband, wife or partner	59%	67% ▲
My mother and/or father	6%	10% ▲
My children aged under 5	11%	13%
My children aged 5 to 14	20%	36% ▲
My children aged 15 or older	16%	14%
Other family/relatives	7%	5%
Other person(s)	5%	2% ▼
None of the above – I live alone	17%	9% ▼

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

BARRIERS TO VISITING

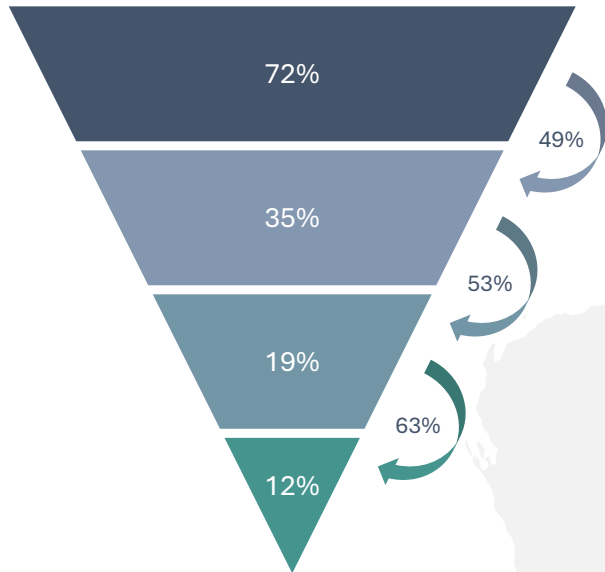
You mentioned that you are unlikely to visit Central Otago within the next 12 months. Why is that?



CONVERTING AWARENESS TO VISITATION



CENTRAL OTAGO (YE DEC 2025)



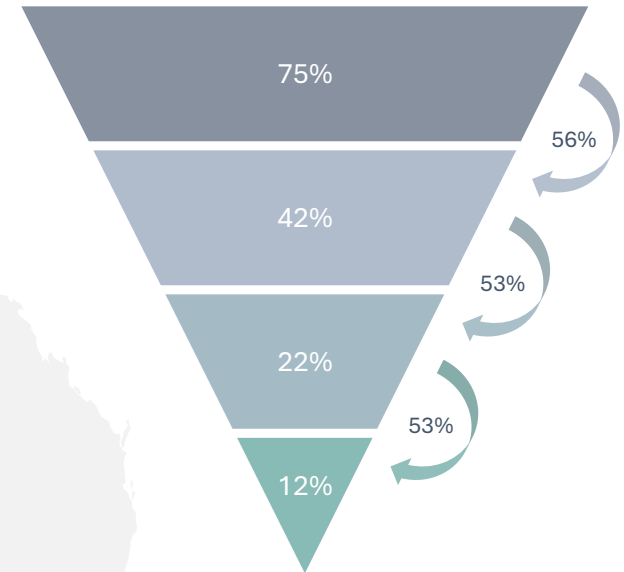
AWARENESS
Have heard of Central Otago

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)

NZ REGIONAL BENCHMARK



	YE Dec 2022		YE Dec 2023		YE Dec 2024	
Awareness	64%	44%	70%	44%	72%	46%
Familiarity	28%	53%	30%	54%	33%	57%
Appeal	15%	57%	16%	59%	19%	57%
Propensity to Visit	9%		10%		11%	

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 dark blue tint. 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

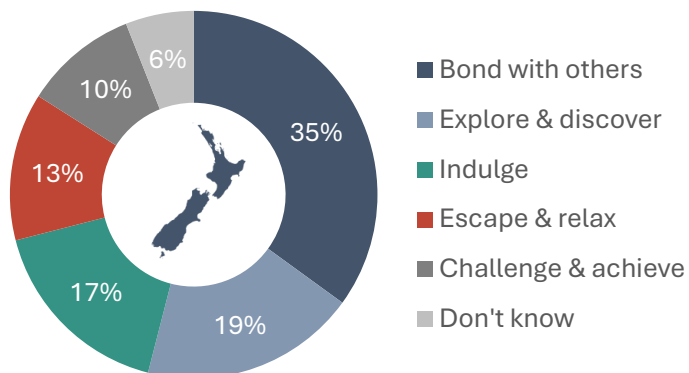
Holidays are a chance for me to get outside, get active and make the most of the natural environment. I like to challenge myself physically, pushing my personal limits.

DOMESTIC VS. AUSTRALIAN TRAVELLERS

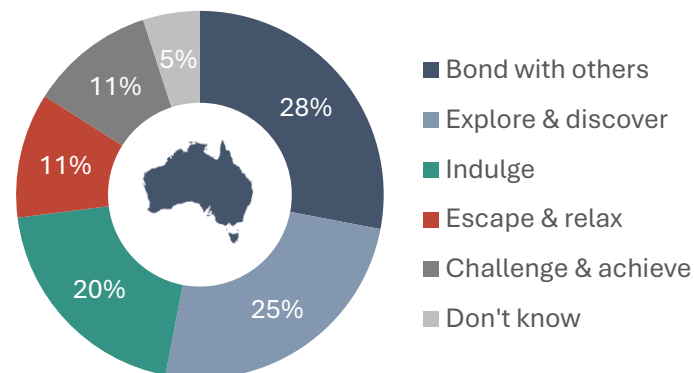


Which one of the following best describes you and your views on travel and holidays?

NEW ZEALAND



AUSTRALIA



	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Bond with others	37%	37%	37%	35%
Explore & discover	17%	18%	17%	19%
Indulge	17%	16%	17%	17%
Escape & relax	14%	14%	13%	13%
Challenge & achieve	9%	9%	9%	10%
Don't know	7%	6%	7%	6%
Base: Total Sample, excl. residents (n=)	3,759	3,753	3,627	3,587

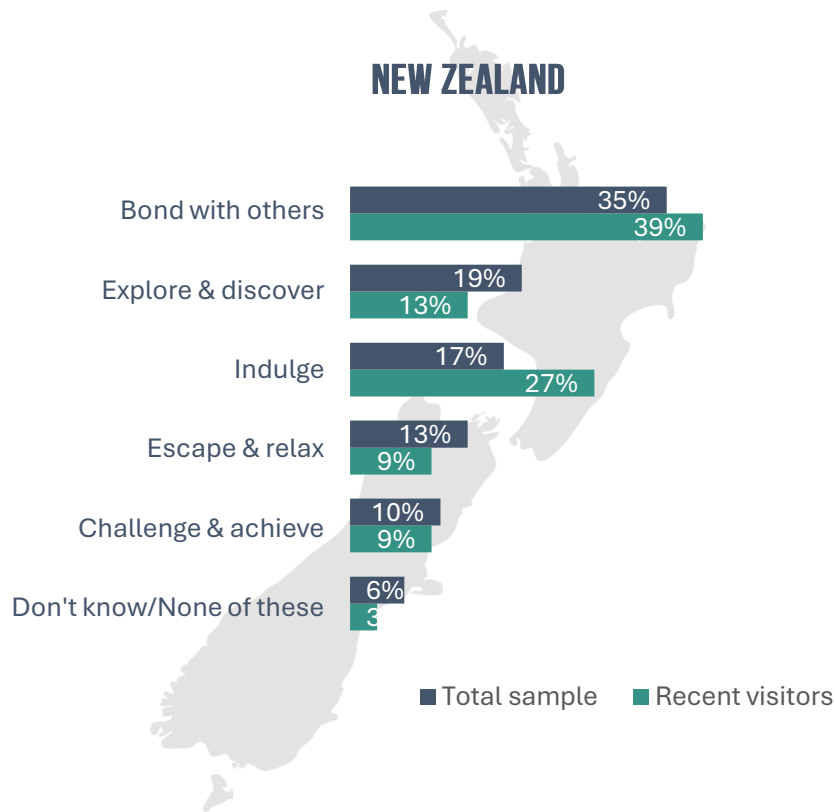
	YE Dec 22	YE Dec 23	YE Dec 24	YE Dec 25
Bond with others	28%	27%	27%	28%
Explore & discover	22%	24%	25%	25%
Indulge	21%	18%	18%	20%
Escape & relax	11%	13%	12%	11%
Challenge & achieve	12%	11%	11%	11%
Don't know	6%	6%	6%	5%
Base: Total Sample (n=)	3,741	3,697	3,633	3,621

DOMESTIC VS. AUSTRALIAN TRAVELLERS



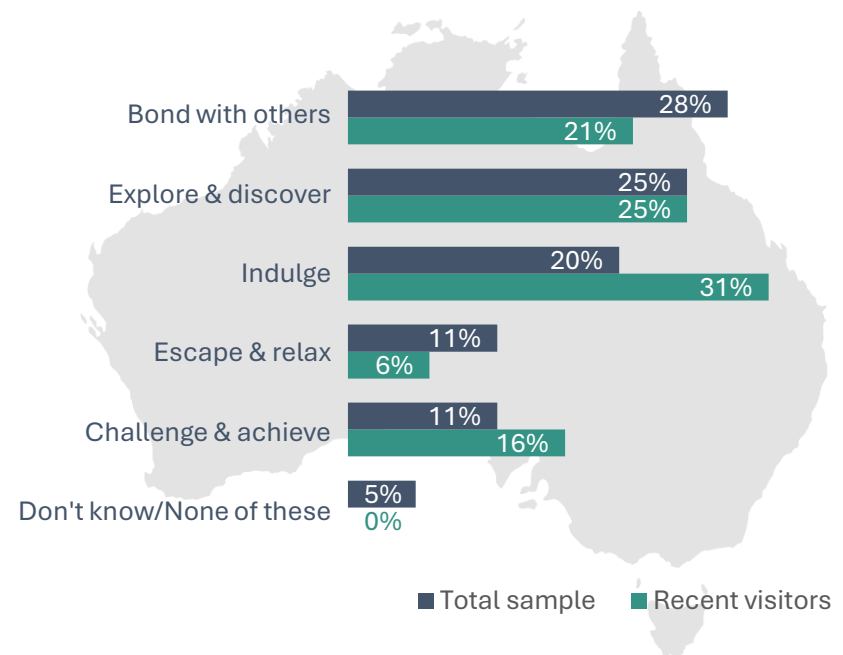
Which one of the following best describes you and your views on travel and holidays?

NEW ZEALAND



Base: (YE Dec 25) Total sample, excl. residents (n=3,587);
Visited Central Otago P12M (n=235)

AUSTRALIA



Base: (YE Dec 25) Total sample (n= 3,621); Visited
Central Otago P12M (n=67)

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	34%	33%	40%	27%	32%	34%
I have never visited, but do have some ideas about what you can do there	17%	17%	18%	17%	23%	17%
I have never visited, and don't know much about what you can do there	34%	33%	28%	38%	29%	33%
I have never heard of Central Otago	15%	17%	14%	18%	16%	16%
Base: (YE Dec 25) Total sample, excl. residents (n=)	2,264	1,561	1,356	876	752	7,208

Appeal	Bond with others	Explore & discover	Indulge	Escape & relax	Challenge & achieve	Total sample
Highly appealing	37%	47%	43%	33%	38%	39%
Somewhat appealing	45%	41%	41%	47%	45%	44%
Not very appealing	10%	6%	8%	11%	9%	9%
Not at all appealing	3%	1%	2%	3%	2%	2%
Don't know / NA	6%	5%	6%	6%	6%	6%
Base: (YE Dec 25) Total sample, excl. residents, heard of Central Otago (n=)	1,929	1,300	1,171	720	632	6,052

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	26%	29%	27%	21%	26%	25%
Somewhat agree	49%	49%	53%	47%	50%	49%
Neither agree nor disagree	22%	20%	16%	26%	20%	22%
Somewhat disagree	2%	2%	2%	4%	4%	3%
Strongly disagree	1%	1%	1%	1%	0%	1%
Base: (YE Dec 25) Module sample – Heard of Central Otago, excl. residents (n=)	1,152	729	673	447	392	3,565

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	19%	23%	22%	13%	20%	19%
Somewhat agree	41%	42%	47%	42%	46%	42%
Neither agree nor disagree	32%	30%	25%	33%	28%	31%
Somewhat disagree	5%	3%	4%	8%	5%	5%
Strongly disagree	3%	2%	2%	5%	1%	3%
Base: (YE Dec 25) Module sample – Heard of Central Otago, excl. residents (n=)	1,152	729	673	447	392	3,565

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	49%	48%	47%	46%	42%	46%
Nature, Wildlife & Eco-tourism	36%	40%	40%	40%	38%	38%
Scenic Sight-Seeing	40%	38%	37%	35%	30%	37%
History & Heritage	35%	37%	31%	34%	31%	34%
Wineries, breweries or distilleries	35%	29%	35%	33%	32%	33%
Cycling/Mountain Biking	31%	30%	28%	32%	29%	30%
Restaurants, Cafés & Bars	35%	31%	31%	30%	21%	31%
Family Activities	31%	31%	26%	29%	24%	28%
Gardens, Parks & Reserves	28%	29%	24%	26%	21%	26%
Fishing or Hunting	25%	29%	25%	24%	22%	25%
Skiing/Snowboarding	24%	22%	22%	25%	19%	22%
Adrenaline Activities	21%	20%	20%	19%	19%	20%
Water-based Activities	18%	18%	17%	13%	15%	16%
Shopping	16%	16%	14%	16%	16%	15%
Arts & Culture	14%	14%	13%	15%	13%	13%
Māori/Pacific Culture	11%	17%	14%	11%	14%	13%
Spa & Wellness	14%	15%	13%	15%	16%	14%
Golf	13%	13%	15%	13%	15%	13%
Events, Concerts & Festivals	11%	12%	12%	11%	13%	12%
Volcanic & Geothermal	7%	10%	9%	6%	10%	8%
Casinos/Gambling	3%	4%	5%	4%	5%	4%
Don't know/None of the above	12%	12%	9%	11%	10%	12%
Base: (YE Dec 25) Module sample - heard of Central Otago, excl. residents (n=)	1,152	729	673	447	392	3,565

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)	21%	24%	23%	17%	22%	21%
	9	15%	21%	19%	13%	15%	17%
Passive	8	28%	25%	25%	23%	28%	26%
	7	14%	15%	16%	19%	15%	15%
Detractors	6	7%	8%	7%	11%	6%	7%
	5	8%	6%	5%	10%	8%	7%
	4	2%	1%	2%	4%	2%	2%
	3	2%	0%	1%	1%	2%	1%
	2	1%	0%	1%	0%	0%	1%
	1	0%	0%	0%	0%	1%	0%
	0 (Not at all likely)	2%	0%	1%	3%	3%	2%
NPS		+13	+29	+25	0	+15	+17
	Base: (YE Dec 25) Visited Central Otago previously (n=)	781	519	547	237	240	2,435

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	16%	17%	20%	10%	18%	16%
Probably will	25%	33%	33%	23%	31%	28%
May or may not	24%	26%	25%	29%	26%	25%
Probably will not	22%	18%	15%	25%	18%	20%
Definitely will not	13%	7%	7%	13%	8%	11%
Base: (YE Dec 25) Intend to travel around/to New Zealand in next 12 months and heard of Central Otago (n=)	1,396	826	820	484	460	4,119

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	49%	42%	54%	48%	39%	47%
I don't have any connections there	37%	23%	24%	42%	16%	31%
It's inconvenient to get there	33%	22%	24%	33%	25%	28%
I don't know enough about what there is to do there	22%	21%	12%	25%	17%	20%
It has nothing that interests me	20%	13%	24%	23%	25%	20%
I've been there before	13%	18%	27%	12%	9%	16%
Accommodation is too expensive	16%	17%	5%	20%	6%	14%
Activities / attractions are too expensive	11%	7%	5%	15%	4%	9%
It is not for people like me	9%	7%	9%	9%	9%	8%
The climate / weather discourages me from visiting	7%	5%	4%	4%	3%	5%
It's difficult to get around	5%	5%	3%	4%	7%	5%
It's not suitable for younger family	4%	6%	0%	3%	4%	4%
It is too touristy	3%	3%	5%	4%	1%	3%
It is too busy / crowded	3%	2%	3%	4%	6%	3%
I am concerned it may not be safe	2%	1%	2%	1%	1%	1%
Other	4%	11%	4%	2%	4%	6%
Base: (YE Dec 25) Intend to Travel Domestically in Next 12 Months, Heard of Central Otago but Unlikely to Visit n=	280	125	113	102	69	723

