VISITOR INSIGHTS PROGRAMME

### **MARKET PERCEPTIONS: ROTORUA**

YEAR ENDING DECEMBER 2023



## MARKET INSIGHTS PROGRAMME: MARKET PERCEPTIONS BACKGROUND & RESEARCH APPROACH

#### Background

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

#### Research Approach

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

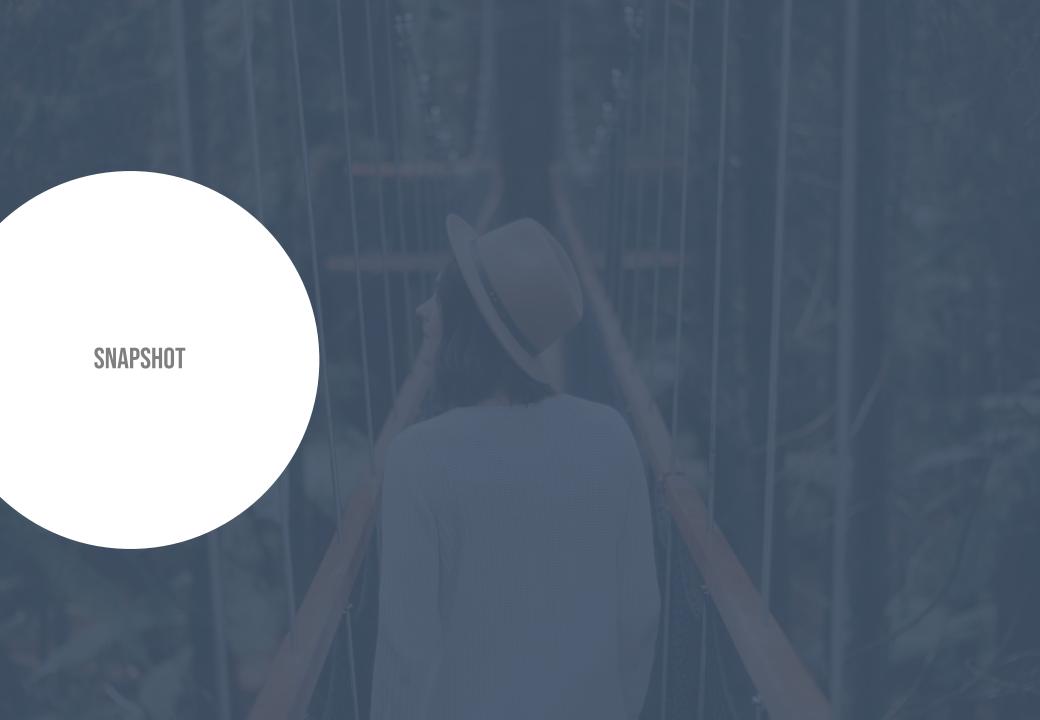
The 'regional benchmark' referenced in this report is the average across five destinations – Auckland, Rotorua, Central Otago, Queenstown, and Marlborough.

Note: Increases in base sizes for YE December 2022 and December 2023 (compared with previous years) are generally due to a change in surveying approach since mid-2021. For some questions, respondents are asked about a randomly selected sub-set of the subscribing regions, rather than the question being asked for all subscribing regions (i.e. a module sample approach). The total sample size was increased at the same time, so base sizes remain sufficient to draw insight and make comparison, and for some questions are larger than they were in previous years.

For more information about this research please contact:

Destination Rotorua Justin Kimberley (07) 351 8150 Justin.Kimberley@rotoruaNZ.com Angus & Associates (04) 499 2212 marketperceptions@angusassociates.co.nz





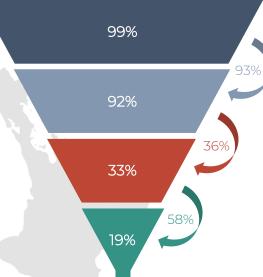
# SNAPSHOT (YE DECEMBER 2023)

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





18% of New Zealanders (excluding Rotorua residents) who travelled domestically in the past 12 months visited Rotorua



#### AWARENESS

Heard of Rotorua

#### KNOWLEDGE

lave visited Rotorua or have some ideas about vhat to do there

#### APPEAL

Consider Rotorua to be 'highly appealing

#### PROPENSITY TO VISIT

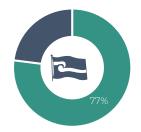
Will probably/ definitely visit Rotorua in next 12 months



- **47%** Family Activities
- **47%** Spa & Wellness



**43%** of New Zealand travellers agree that Rotorua is a place to relax and unwind\*

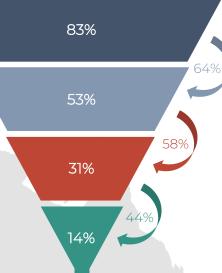


**77%** of New Zealand travellers agree that Rotorua is a place to experience authentic Māori culture\*\*

# SNAPSHOT (YE DECEMBER 2023)









Heard of Rotorua

#### KNOWLEDGE

lave visited Rotorua or have some ideas about vhat to do there

#### APPEAL

Consider Rotorua to be 'highly appealing

#### PROPENSITY TO VISIT

Will probably/ definitely visit Rotorua in next 12 months



**24%** of Australians who travelled to New Zealand in the past 12 months visited Rotorua

Australian travellers associate Rotorua with...



**49%** Volcanic & Geothermal





35% Walking & Hiking

**33%** History & Heritage



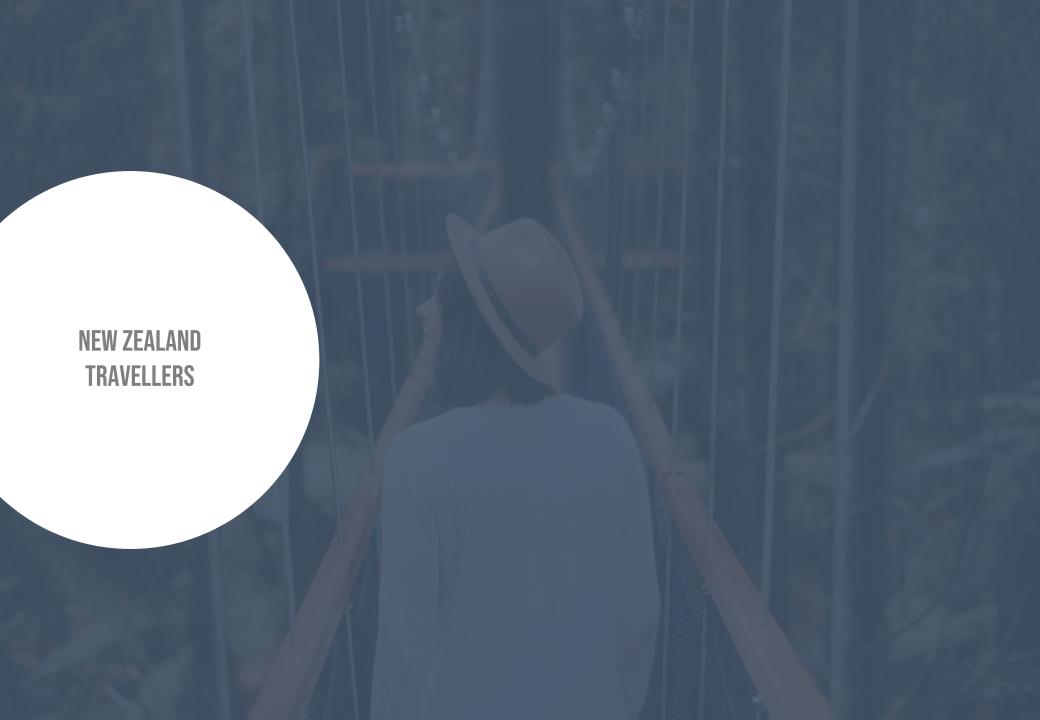
**41%** of Australian travellers agree that Rotorua is a place to relax and unwind\*



**57%** of Australian travellers agree that Rotorua is a place to experience authentic Māori culture\*\*

### $angus \, \text{associates} \,$

Ī



## NEW ZEALAND TRAVELLERS **ROTORUA UPDATE: YEAR ENDING DECEMBER 2023**

Almost one-fifth (18%) of domestic travellers have visited Rotorua in the last 12 months, twothirds of this group (or 12% of all domestic travellers) staying overnight. Market penetration is consistent with the prior year end (YE December 2022) but below the levels seen in the years immediately prior to and post the COVID outbreak (YE Dec 2019 and YE Dec 2020).

Almost 75% of domestic visitors in the last 12 months originated from adjacent or nearby regions, including Auckland (40%), Waikato (21%) and Bay of Plenty (13%). Rotorua appears to have strong family market appeal with a higher than average proportion of visitors in the 20-39 (and especially 30-39) year age group and from households which include children.

Rotorua is seen as appealing by more than 75% of domestic travellers (and more than 90% of recent visitors). While appeal has diminished to some extent since YE Dec 2019 across the market as a whole, Rotorua's appeal has held reasonably steady with visitors.

In the YE December 2023, one in ten domestic travellers indicated they would "definitely" visit Rotorua in the next 12 months (with a further 23% indicating they would "probably" visit). Reflecting actual visitation, propensity to visit has diminished to some extent in the years postpandemic. Propensity to visit remains strongest amongst Aucklanders and residents of regions adjacent to Rotorua, amongst 20-39 year olds and amongst those with children in the household.

77% of New Zealand travellers agree that Rotorua is a place to experience authentic Māori culture, leading other destinations by a considerable margin on this measure. Additionally, 43% of New Zealand travellers see Rotorua as a place to relax and unwind, although this is not a proposition that the destination 'owns' (with Taupō and Queenstown both rating more strongly in this respect).

Net Promoter Score (NPS) is used to measure previous visitors' propensity to recommend Rotorua as a travel destination. For the year ending December 2023, Rotorua's domestic market NPS was -13, lower than the regional benchmark of +1. Rotorua's NPS amongst recent visitors was a more positive +12 (relative to the regional benchmark of +18).

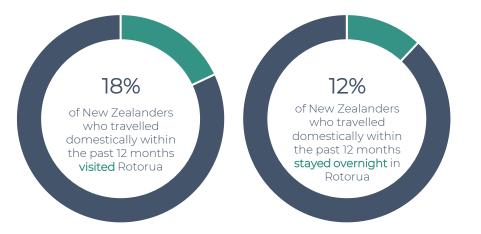


#### angus & Associates

## NEW ZEALAND TRAVELLERS **MARKET PENETRATION & FAMILARITY**

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

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



;		Benchmark
I have visited Rotorua	83%	69%
I have never visited, but do have some ideas about what you can do there	9%	14%
I have never visited, and don't know much about what you can do there	7%	15%
I have never heard of Rotorua	4%	2%
Base: Total sample, excluding residents	n=3,713	

Familiarity

Base: Travelled around NZ in P12M, excluding residents (n=3,382)

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
Visited Rotorua	26%	25%	21%	18%	18%
Stayed Overnight in Rotorua	17%	16%	14%	12%	12%
Base: Travelled around NZ P12M (excluding residents)	n=2,237	n=2,255	n=3,029	n=3,592	n=3,382



 $angus {\tt associates}$ 

# NEW ZEALAND TRAVELLERS **VISITOR PROFILE**



	Total Sample (excl. residents)	Visited Rotorua (past 12 months)
Region of Residence		
Northland	4%	3%
Auckland	33%	40% 🔺
Waikato	10%	21%
Bay of Plenty	5%	13% 🔺
Tairāwhiti / Gisborne	7%	7%
Hawke's Bay	4%	3%
Taranaki	3%	2%
Manawatū-Whanganui	5%	4%
Wellington (& Wairarapa)	11%	8% 🔻
Tasman	7%	0% 🔻
Nelson	1%	1%
Marlborough	1%	0% 🔻
West Coast	1%	0% 🔻
Canterbury	13%	4% 🔻
Otago	5%	0% 🔻
Southland	2%	0% 🔻
Base:	n=3,713	n=619

	Total Sample (excl. residents)	Visited Rotorua (past 12 months)
Age		
18-19 years	4%	5%
20-29 years	17%	19%
30-39 years	17%	21%
40-49 years	17%	18%
50-59 years	17%	14% 🔻
60-69 years	13%	11%
70+ years	14%	12%
Household Composition		
My husband, wife or partner	60%	64%
My mother and/or father	7%	5% 🔻
My children aged under 5	11%	15%
My children aged 5 to 14	18%	28% 🔺
My children aged 15 or older	13%	14%
Other family/relatives	10%	11%
Other person(s)	8%	7%
None of the above – I live alone	15%	11%
Base:	n=3,713	n=619

## NEW ZEALAND TRAVELLERS



What is the first thing that comes to mind when you think about Rotorua? Which, if any, of the following destinations...?



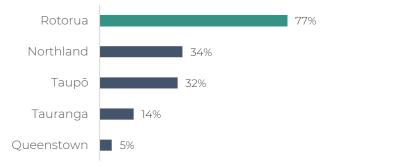
Note: Word cloud was created based on data from Q4 2023

### (Q3 JUL-SEP) IS A PLACE YOU CAN RELAX AND UNWIND



Base: Module sample - heard of Rotorua, excluding residents (n=562)

### (Q4 OCT-DEC) IS A PLACE TO EXPERIENCE AUTHENTIC MĀORI CULTURE



Base: Module sample - heard of Rotorua, excluding residents (n=534)

## NEW ZEALAND TRAVELLERS ACTIVITIES/EXPERIENCES ASSOCIATED WITH ROTORUA

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

Total Sample	YE Dec 2021	YE Dec 2022	YE Dec 2023
Volcanic & Geothermal	70%	73%	71%
Māori/Pacific Culture	64%	63%	62%
Scenic Sight-Seeing	53%	49%	49%
History & Heritage	51%	48%	47%
Family Activities	47%	44%	47%
Spa & Wellness	47%	46%	47%
Walking & Hiking	40%	38%	41%
Nature, Wildlife & Eco-tourism	42%	36%	39%
Gardens, Parks & Reserves	38%	36%	36%
Restaurants, Cafés & Bars	38%	35%	36%
Arts & Culture	38%	36%	33%
Adrenaline Activities	34%	30%	31%
Cycling/Mountain Biking	35%	30%	31%
Fishing or Hunting*	-	21%	22%
Water-based Activities	22%	19%	21%
Shopping	17%	16%	17%
Events, Concerts & Festivals	15%	15%	15%
Golf*	-	12%	11%
Wineries, Breweries or Distilleries*	-	5%	4%
Casinos/Gambling	6%	4%	4%
Skiing/Snowboarding	3%	3%	3%
Don't know/None of the above	4%	3%	3%
Base: Heard of Rotorua	n=1,853	n=1,398	n=2,050

Recent Visitors	YE Dec 2021	YE Dec 2022	YE Dec 2023
Volcanic & Geothermal	78%	73%	72%
Māori/Pacific Culture	70%	68%	67%
Family Activities	55%	58%	59%
Spa & Wellness	58%	60%	58%
Scenic Sight-Seeing	62%	56%	56%
Walking & Hiking	50%	51%	54%
Restaurants, Cafés & Bars	48%	48%	51%
History & Heritage	60%	50%	50%
Gardens, Parks & Reserves	45%	46%	44%
Cycling/Mountain Biking	45%	44%	43%
Nature, Wildlife & Eco-tourism	49%	40%	43%
Adrenaline Activities	43%	40%	41%
Arts & Culture	42%	35%	39%
Water-based Activities	30%	27%	29%
Shopping	21%	26%	26%
Fishing or Hunting*	-	23%	26%
Events, Concerts & Festivals	20%	21%	23%
Golf*	-	17%	14%
Wineries, Breweries or Distilleries*	-	9%	6%
Casinos/Gambling	7%	6%	5%
Skiing/Snowboarding	3%	4%	5%
Don't know/None of the above	0%	0%	1%
Base: Rotorua Visitors (P12M)	n=408	n=242	n=360

\*Answer choices changed in Q3 2022

## NEW ZEALAND TRAVELLERS **ROTORUA APPEAL**



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

Total Sample	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023	Re Ber
Highly Appealing	38%	38%	39%	36%	35%	
Somewhat Appealing	45%	42%	43%	41%	41%	
Not very Appealing	12%	14%	13%	15%	16%	
Not at all Appealing	3%	4%	4%	6%	7%	
Don't know/NA	2%	2%	1%	1%	1%	
Base: Heard of Rotorua, excluding residents	n=2,431	n=2,455	n=3,088	n=3,687	n=3,673	

Total Sample	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023	Regional Benchmark
Highly Appealing	55%	54%	53%	56%	53%	59%
Somewhat Appealing	38%	35%	36%	35%	37%	30%
Not very Appealing	5%	9%	8%	7%	8%	8%
Not at all Appealing	1%	2%	2%	1%	3%	2%
Don't know/NA	1%	0%	0%	0%	0%	0%
Base: Visited Rotorua P12M	n=579	n=560	n=636	n=650	n=618	

# NEW ZEALAND TRAVELLERS **NET PROMOTER SCORE (NPS)**

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

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

		Visited Rotorua previously	Visited Rotorua recently (P12M)	ALL PREVIOUS VISITORS
	10 (Extremely likely)	16%	23%	
omoters	9	10%	12%	<b>26%</b> 39% -13
	8	19%	28%	PROMOTERS DETRACTORS = NPS
Passive	7	16%	14%	
	6	11%	9%	
	5	11%	8%	
	4	5%	3%	RECENT VISITORS
tractors	3	4%	1%	
	2	2%	1%	35% 23% +12
	1	1%	0%	minus
	0 (Not at all likely)	5%	1%	PROMOTERS DETRACTORS NPS
	Base:	n=3,085	n=604	



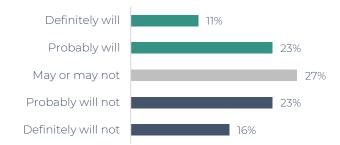
# NEW ZEALAND TRAVELLERS **PROPENSITY TO VISIT ROTORUA**



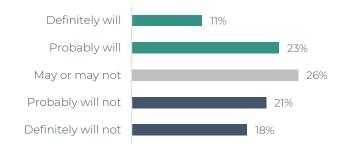
How likely are you to visit Rotorua within the next 12 months? (for any reason / for leisure purposes)

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

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



### PROPENSITY TO VISIT ROTORUA IN NEXT 12 MONTHS (LEISURE)



Base: Intend to travel domestically N12M, excl. residents, heard of Rotorua, (n=3,572)

### **PROPENSITY TO VISIT ROTORUA IN NEXT 12 MONTHS (ANY REASON)**

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
Definitely will	14%	13%	13%	10%	11%
Probably will	23%	23%	23%	21%	23%
May or may not	29%	28%	28%	29%	27%
Probably/Definitely will not	34%	36%	36%	40%	39%
Base: Intend to travel domestically N12M, excl. residents, heard of Rotorua	n=2,135	n=2,102	n=2,642	n=3,599	n=3,572



# NEW ZEALAND TRAVELLERS



	Total Sample (excl. residents)	'Definitely' will visit Rotorua (next 12 months)
Age		
18-19 years	4%	5%
20-29 years	17%	19%
30-39 years	17%	24%
40-49 years	17%	17%
50-59 years	17%	13%
60-69 years	13%	9%
70+ years	14%	13%
Household Composition		
My husband, wife or partner	60%	60%
My mother and/or father	7%	7%
My children aged under 5	11%	16% 🔺
My children aged 5 to 14	18%	25% 🔺
My children aged 15 or older	13%	14%
Other family/relatives	10%	12%
Other person(s)	8%	7%
None of the above – I live alone	15%	9% 🔻
Base:	n=3,713	n=409





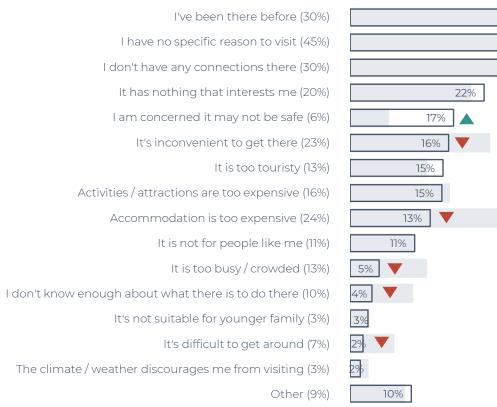


16

## NEW ZEALAND TRAVELLERS BARRIERS TO VISITING ROTORUA

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

#### Barriers to visiting (regional benchmark %)



30%

45%

44%

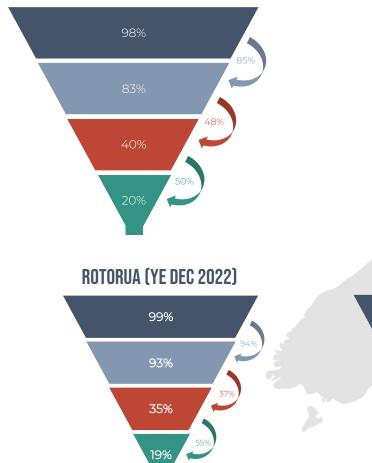
Rotorua

Regional benchmark

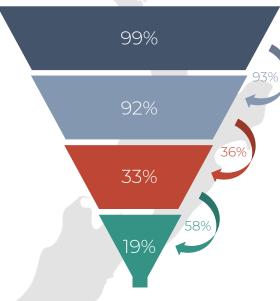


# NEW ZEALAND TRAVELLERS CONVERTING AWARENESS TO VISITATION

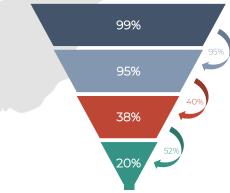
**REGIONAL BENCHMARK** 



ROTORUA (YE DEC 2023)



**ROTORUA (YE DEC 2021)** 



AWARENESS

Heard of Rotorua

#### KNOWLEDGE

lave visited Rotorua or have some ideas about vhat to do there

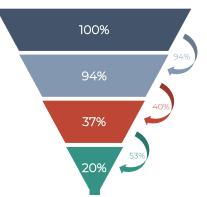
#### APPEAL

Consider Rotorua to be 'highly appealing

**PROPENSITY TO VISIT** 

Will probably/ definitely visit Rotorua in next 12 months

### ROTORUA (YE DEC 2020)



 $angus_{\tt & associates}$ 



## AUSTRALIAN TRAVELLERS **ROTORUA UPDATE: YEAR ENDING DECEMBER 2023**

Of all Australian travellers to New Zealand in the last 12 months, 24% visited Rotorua, and 15% stayed overnight. As in the domestic market, 20-39 year olds are over-represented amongst visitors to Rotorua, as are international visitors with children in the household.

As a destination, Rotorua is most strongly associated with volcanic and geothermal experiences and Māori/Pacific culture. It is also widely associated with nature, wildlife and ecotourism experiences, with walking and hiking, and with history and heritage.

More than half (57%) of Australian travellers who have heard of Rotorua agree that it is a place to experience authentic Māori culture and 41% agree that it is a place in which you can relax and unwind. While Rotorua 'owns' the positioning for authentic Māori culture (at 57% compared with Taupō's 37%), Queenstown scores more strongly than Rotorua as a destination for relaxation.

In line with the regional benchmarks, 85% of Australian travellers find Rotorua appealing, as do 95% of recent Australian visitors to Rotorua. These results are reflected in the region's Australian market NPS scores: +25 (amongst all Australian travellers who have visited Rotorua) and +45 amongst recent Australian travellers (last 12 months).

An encouraging 39% of Australian travellers intend to visit New Zealand in the next 12 months and, of this group, 14% indicate they will 'definitely' visit Rotorua and 32% 'probably' will. Most 'ripe' for conversion are residents of New South Wales, and those with children in the household.

Amongst those not intending to visit the main barriers are that they've been to Rotorua before and that they have no specific reason to visit. Providing new reasons to visit – and to visit again NOW – may help overcome these barriers.



### angus & Associates

# AUSTRALIAN TRAVELLERS **MARKET PENETRATION & FAMILARITY**

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

11%

of Australians surveyed visited New Zealand in the past 12 months



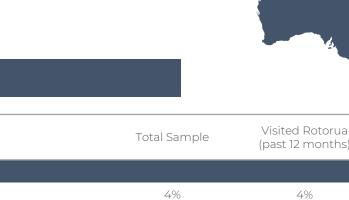
Base: Travelled to NZ P12M (n=551)

Familiarity		Regional Benchmark
I have visited Rotorua	32%	28%
I have never visited, but do have some ideas about what you can do there	22%	22%
I have never visited, and don't know much about what you can do there	30%	33%
I have never heard of Rotorua	17%	18%
Base: Total sample	n=3,697	

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
Visited Rotorua	27%	21%	13%	18%	24%
Stayed Overnight in Rotorua	18%	12%	9%	12%	15%
Base: Travelled to NZ P12M	n=520	n=514	n=345	n=290	n=551



# AUSTRALIAN TRAVELLERS



	Total Sample	Visited Rotorua (past 12 months)		
Region of Residence				
Australian Capital Territory	2%	2%		
New South Wales	31%	38%		
Northern Territory	1%	1%		
Queensland	20%	18%		
South Australia	7%	4%		
Tasmania	3%	2%		
Victoria	24%	26%		
Western Australia	11%	10%		
Base:	n= 3,697	n= 133		

	Total Sample	(past 12 months)
Age		
18-19 years	4%	4%
20-29 years	17%	26%
30-39 years	18%	24%
40-49 years	18%	19%
50-59 years	16%	11%
60-69 years	13%	9%
70+ years	14%	8% 🔻
Household Composition		
My husband, wife or partner	58%	62%
My mother and/or father	7%	9%
My children aged under 5	11%	17%
My children aged 5 to 14	19%	29% 🔺
My children aged 15 or older	16%	17%
Other family/relatives	8%	9%
Other person(s)	5%	2%
None of the above – I live alone	17%	15%
Base:	n= 3,697	n= 133

## AUSTRALIAN TRAVELLERS

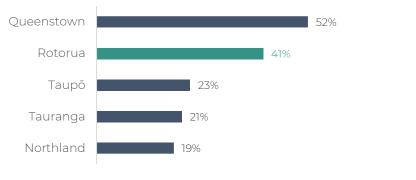


What is the first thing that comes to mind when you think about Rotorua? Which, if any, of the following destinations...?



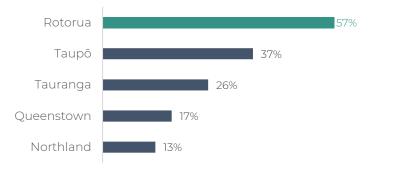
Note: Word cloud was created based on data from Q4 2023

### (Q3 JUL-SEP) IS A PLACE YOU CAN RELAX AND UNWIND



Base: Module sample - heard of Rotorua (n=515)

### (Q4 OCT-DEC) IS A PLACE TO EXPERIENCE AUTHENTIC MĀORI CULTURE



Base: Module sample - heard of Rotorua (n=502)

## AUSTRALIAN TRAVELLERS ACTIVITIES / EXPERIENCES ASSOCIATED WITH ROTORUA

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

Total Sample	YE Dec 2021	YE Dec 2022	YE Dec 2023
Volcanic & Geothermal	43%	46%	49%
Māori/Pacific Culture	34%	38%	39%
Nature, Wildlife & Eco-tourism	29%	31%	35%
Walking & Hiking	25%	30%	35%
History & Heritage	27%	28%	33%
Scenic Sight-Seeing	29%	30%	32%
Spa & Wellness	23%	24%	25%
Gardens, Parks & Reserves	18%	20%	23%
Family Activities	19%	18%	21%
Restaurants, Cafés & Bars	16%	18%	20%
Arts & Culture	15%	17%	17%
Fishing or Hunting*	-	12%	14%
Cycling/Mountain Biking	11%	10%	13%
Shopping	11%	11%	13%
Water-based Activities	11%	11%	12%
Adrenaline Activities	11%	9%	11%
Wineries, Breweries or Distilleries*	-	8%	10%
Events, Concerts & Festivals	9%	6%	7%
Skiing/Snowboarding	6%	5%	6%
Golf*	-	5%	5%
Casinos/Gambling	5%	3%	4%
Don't know/None of the above	15%	17%	11%
Base: Heard of Rotorua	n=1,683	n=1,403	n=1,818





## AUSTRALIAN TRAVELLERS



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

Total Sample	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023	Regional Benchmark
Highly Appealing	42%	39%	45%	45%	47%	47%
Somewhat Appealing	39%	41%	38%	38%	38%	39%
Not very Appealing	8%	9%	7%	7%	6%	6%
Not at all Appealing	2%	3%	3%	2%	2%	2%
Don't know/NA	9%	8%	7%	8%	6%	7%
Base: Heard of Rotorua	n=2,130	n=2,107	n=2,620	n=3,016	n=3,058	

Total Sample	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023	Regiona Benchma
Highly Appealing	65%	60%	77%	63%	75%	74%
Somewhat Appealing	28%	34%	11%	35%	20%	22%
Not very Appealing	6%	6%	5%	0%	2%	3%
Not at all Appealing	0%	0%	2%	2%	2%	1%
Don't know/NA	1%	0%	5%	0%	1%	0%
Base: Visited Rotorua P12M	n=141	n=105	n=44	n=51	n=133	

# AUSTRALIAN TRAVELLERS **NET PROMOTER SCORE (NPS)**

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

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

		Visited Rotorua previously	Visited Rotorua recently (P12M)
Promoters	10 (Extremely likely) 9	25% 18%	33% 22%
Passive	8 7	24% 15%	25% 11%
	6 5 4	6% 7% 1%	4% 4% 1%
Detractors	3	1% 1% 0%	0%
	1 O (Not at all likely)	1% 2%	0% 1%
	Base:	n=1,172	n=113

# AUSTRALIAN TRAVELLERS **PROPENSITY TO VISIT ROTORUA**

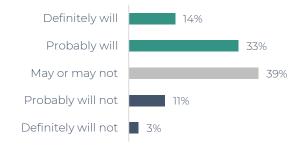


How likely are you to visit Rotorua within the next 12 months? (for any reason / for leisure purposes)

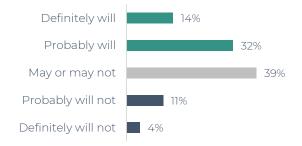
39%

Australian travellers intend to visit NZ in the next 12 months (i.e. definitely / probably will travel around N2

### **PROPENSITY TO VISIT ROTORUA IN NEXT 12 MONTHS (ANY REASON)**



### PROPENSITY TO VISIT ROTORUA IN NEXT 12 MONTHS (LEISURE)



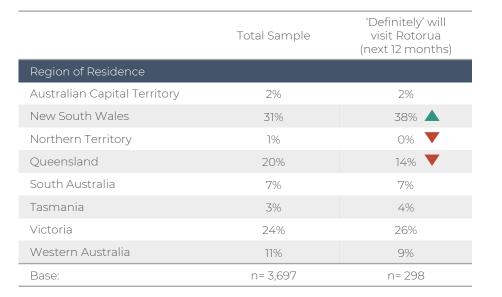
Base: Intend to travel to NZ N12M, heard of Rotorua (n=2,165)

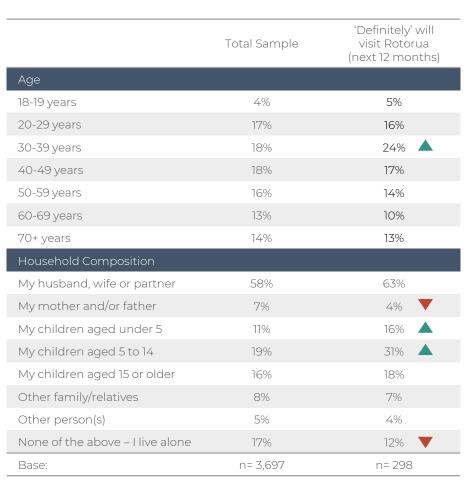
### **PROPENSITY TO VISIT ROTORUA IN NEXT 12 MONTHS (ANY REASON)**

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
Definitely will	18%	28%	24%	15%	14%
Probably will	37%	34%	41%	30%	33%
May or may not	29%	24%	23%	40%	39%
Probably/Definitely will not	16%	14%	12%	15%	14%
Base: Intend to travel to NZ N12M, heard of Rotorua	n=807	n=797	n=1,099	n=2,045	n=2,165



# AUSTRALIAN TRAVELLERS









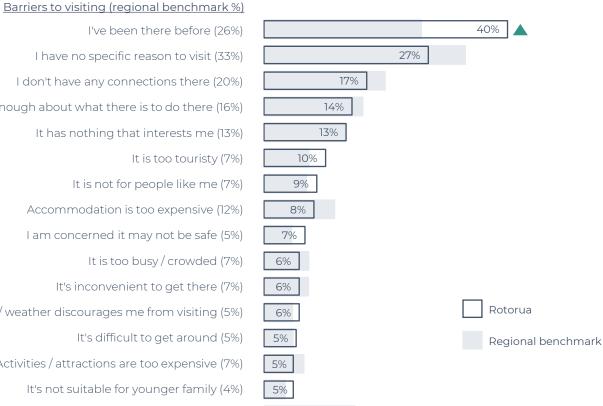




28

### AUSTRALIAN TRAVELLERS **BARRIERS TO VISITING ROTORUA**

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



- I've been there before (26%) I have no specific reason to visit (33%) I don't have any connections there (20%) I don't know enough about what there is to do there (16%) It has nothing that interests me (13%) It is too touristy (7%) It is not for people like me (7%) Accommodation is too expensive (12%) I am concerned it may not be safe (5%) It is too busy / crowded (7%) It's inconvenient to get there (7%)
- The climate / weather discourages me from visiting (5%)
  - It's difficult to get around (5%)
  - Activities / attractions are too expensive (7%)
    - It's not suitable for younger family (4%)
      - Other (15%)



13%



#### AUSTRALIAN TRAVELLERS **CONVERTING AWARENESS TO VISITATION**

