VISITOR INSIGHTS PROGRAMME

MARKET PERCEPTIONS: ROTORUA

YEAR ENDING JUNE 2022



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 July 2021-June 2022.

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.

Note: Differences in base sizes between YE June 2022 and previous years are generally due to a change in surveying approach in the most recent year – where 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:

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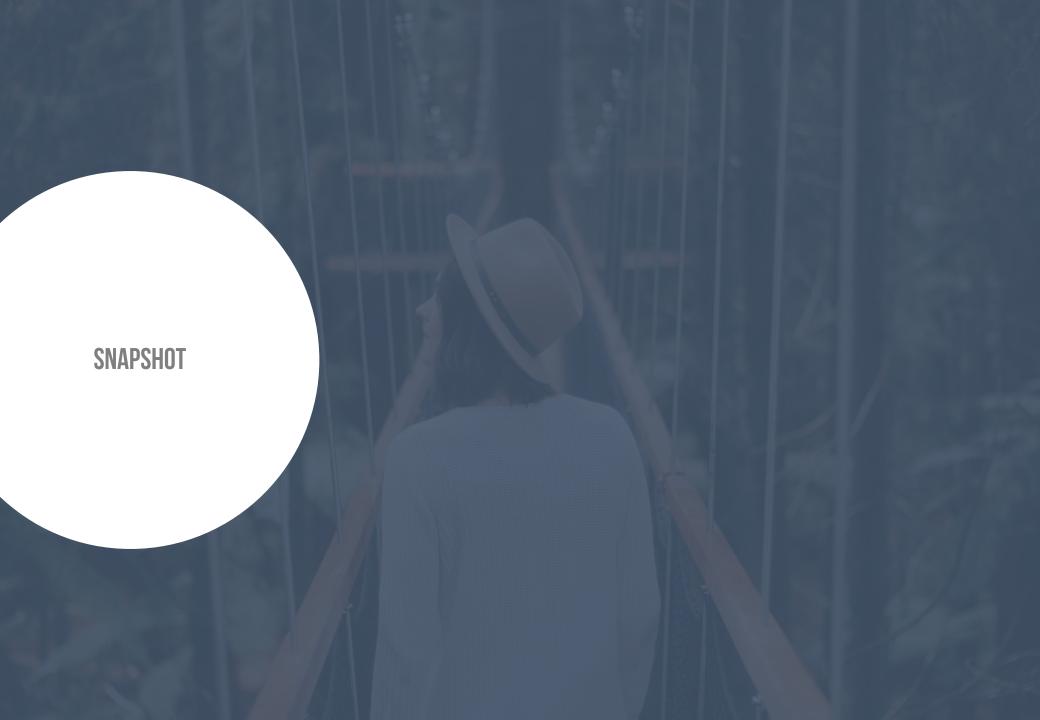
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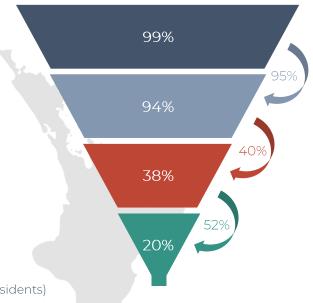


SNAPSHOT (YE JUNE 2022)

NEW ZEALAND TRAVELLERS

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





AWARENESS

Heard of Rotorua

APPEAL

PROPENSITY TO VISIT



19% of New Zealanders (excluding Rotorua residents) who travelled domestically in the past 12 months visited Rotorua

New Zealand travellers associate Rotorua with...



73% Volcanic & Geothermal



64% Māori/Pacific Culture



52% Scenic Sightseeing



51% History & Heritage



47% Spa & Wellness



49% of New Zealand travellers agree that Rotorua is a place you can relax and unwind



66% of New Zealand travellers agree that Rotorua has lots of nature-based things to do



33% of New Zealand travellers agree that Rotorua is a top mountain biking destination



54% of New Zealand travellers agree that Rotorua is a good place to take the family on holiday

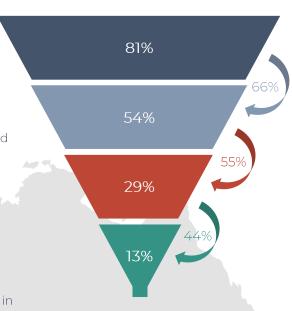


SNAPSHOT (YE JUNE 2022)

AUSTRALIAN TRAVELLERS



3% of Australian travellers have travelled to New Zealand in the past 12 months



AWARENESS

Heard of Rotorua

APPEAL

PROPENSITY TO VISIT



17% of Australians who travelled to New Zealand in the past 12 months visited Rotorua

Australian travellers associate Rotorua with...



47% Volcanic & Geothermal



36% Māori/Pacific Culture



30% Nature, Wildlife & Eco-tourism



29% Scenic Sightseeing



40% of Australian travellers agree that Rotorua is a place you can relax and unwind



50% of Australian travellers agree that Rotorua has lots of nature-based things to do

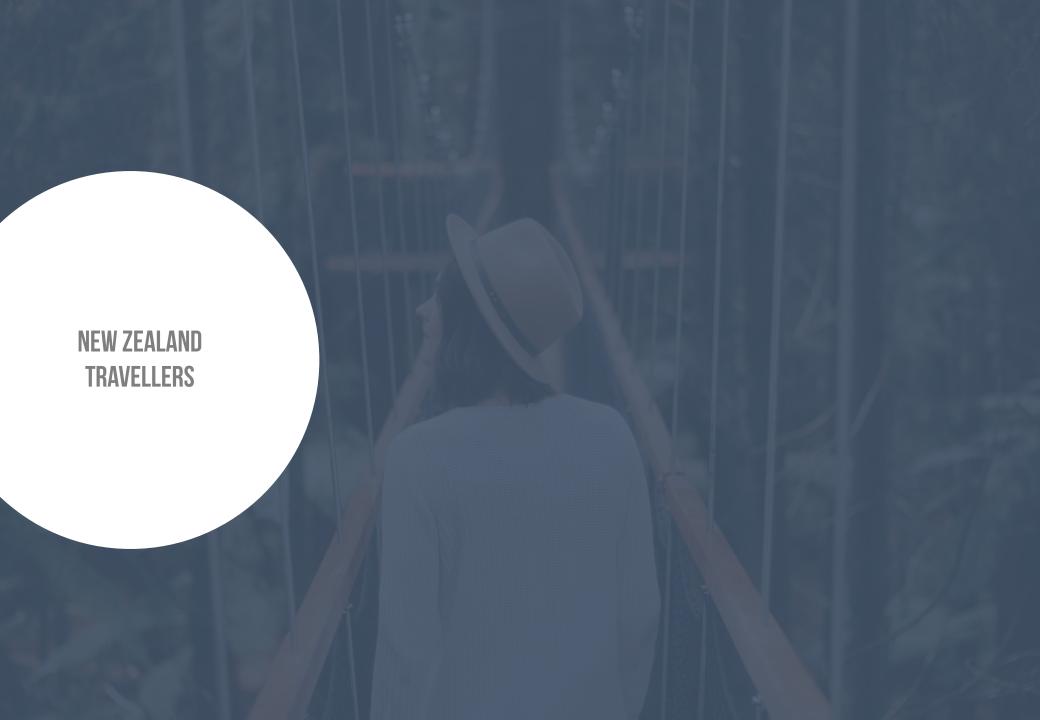


11% of Australian travellers agree that Rotorua is a top mountain biking destination



42% of Australian travellers agree that Rotorua is a good place to take the family on holiday





ROTORUA UPDATE: YEAR ENDING JUNE 2022

While the proportion of New Zealanders travelling domestically remains stable, the past 12 months have been influenced by increased domestic competition and destination marketing by other regions.

Four out of five New Zealand travellers surveyed find Rotorua appealing and the proportion is higher still among those who have recently visited. This represents an opportunity for fostering more advocacy for the destination from recent visitors.

Two thirds of New Zealand travellers (66%) agree that Rotorua has lots of nature-based things to do, and around half (54%) agree that Rotorua is a good place to take the family on holiday.

The top five activities/experiences New Zealand travellers associate with Rotorua are volcanic & geothermal, Māori/Pacific culture, scenic sightseeing, history and heritage, and spa and wellness.

Net Promoter Score (NPS) is used to measure previous visitors' propensity to recommend Rotorua as a travel destination. For the period April – June 2022 New Zealand travellers NPS for Rotorua is -13, close to the regional benchmark of -10. Positively, the NPS is considerably higher for recent visitors to Rotorua, at +10.

The most common barriers to visiting Rotorua for domestic travellers are that they have been to Rotorua before (53%), and that they have no specific reason to visit (47%).



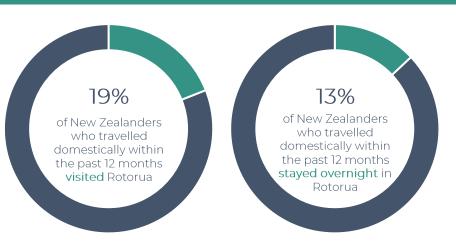


MARKET PENETRATION & FAMILARITY

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



Familiarity	
I have visited Rotorua	85%
I have never visited, but do have some ideas about what you can do there	8%
I have never visited, and don't know much about what you can do there	5%
I have never heard of Rotorua	1%
Base: Total sample, excluding residents	n=3,723

Regional Benchmark
67%
13%
18%
2%

Base: Travelled around NZ in P12M, excluding residents (n=3,662)

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Visited Rotorua	27%	26%	23%	19%
Stayed Overnight in Rotorua	18%	16%	15%	13%
Base: Travelled around NZ P12M (excluding residents)	n=2,232	n=2,242	n=2,343	n=3,662



VISITOR PROFILE



	Total Sample (excl. residents)	Visited Rotorua (past 12 months)
Region of Residence		
Northland	4%	2%
Auckland	33%	42%
Waikato	10%	18%
Bay of Plenty	5%	11%
Tairāwhiti / Gisborne	1%	1%
Hawke's Bay	4%	4%
Taranaki	3%	3%
Manawatū-Whanganui	5%	5%
Wellington (& Wairarapa)	11%	7%
Tasman	1%	0%
Nelson	2%	1%
Marlborough	1%	0%
West Coast	1%	0%
Canterbury	13%	4%
Otago	5%	1%
Southland	2%	0%
Base:	n=3,723	n=691

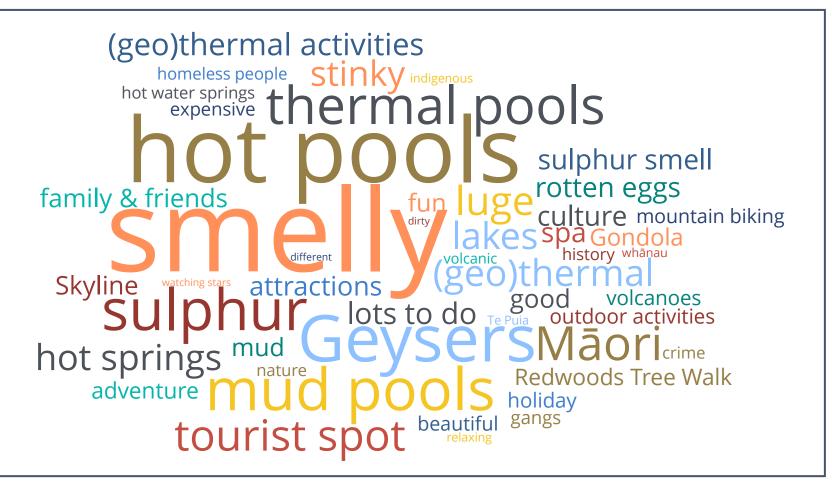
	Total Sample (excl. residents)	Visited Rotorua (past 12 months)
Age		
18-19 years	3%	2%
20-29 years	18%	21%
30-39 years	17%	22%
40-49 years	16%	16%
50-59 years	17%	16%
60-69 years	14%	10%
70+ years	15%	12%
Household Composition		
My husband, wife or partner	63%	66%
My mother and/or father	8%	9%
My children aged under 5	11%	14%
My children aged 5 to 14	17%	24%
My children aged 15 or older	13%	14%
Other family/relatives	8%	9%
Other person(s)	8%	8%
None of the above – I live alone	12%	9%
Base:	n=3,723	n=691



ROTORUA POSITIONING



What is the first thing that comes to mind when you think about Rotorua?

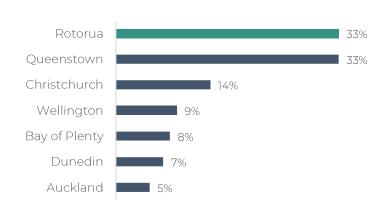


PERCEPTIONS OF ROTORUA

Which (if any) of the following regions...?

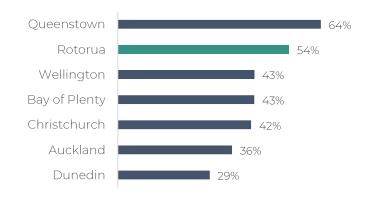


IS A TOP MOUNTAIN BIKING DESTINATION



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022
Rotorua	39%	40%	40%	33%	33%
Queenstown	38%	37%	38%	33%	33%
Christchurch	12%	15%	15%	16%	14%
Wellington	8%	9%	10%	11%	9%
Bay of Plenty	-	-	-	10%	8%
Dunedin	-	-	-	9%	7%
Auckland	6%	8%	12%	12%	5%
Base: NZ Travellers	n=615	n=592	n=630	n=517	n=290

IS A GOOD PLACE TO TAKE THE FAMILY ON HOLIDAY



	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022
Queenstown	58%	61%	58%	56%	64%
Rotorua	66%	65%	60%	53%	54%
Bay of Plenty	-	-	-	51%	43%
Wellington	49%	50%	44%	42%	43%
Christchurch	38%	43%	40%	39%	42%
Auckland	39%	43%	36%	35%	36%
Dunedin	-	-	-	30%	29%
Base: NZ Travellers	n=592	n=607	n=621	n=620	n=255

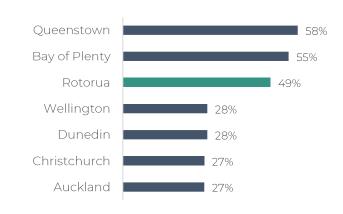


PERCEPTIONS OF ROTORUA

Which (if any) of the following regions...?

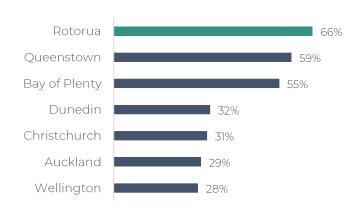


IS A PLACE YOU CAN RELAX AND UNWIND



	Q3 2018	Q3 2019	Q3 2020	Q3 2021
Queenstown	57%	56%	53%	58%
Bay of Plenty	-	-	-	55%
Rotorua	52%	56%	46%	49%
Wellington	32%	38%	35%	28%
Dunedin	-	-	31%	28%
Christchurch	31%	32%	33%	27%
Auckland	26%	27%	25%	27%
Base: NZ Travellers	n=583	n=622	n=625	n=316

HAS LOTS OF NATURE-BASED THINGS TO DO



	Q4 2018	Q4 2019	Q4 2020	Q4 2021
Rotorua	73%	75%	61%	66%
Queenstown	65%	64%	52%	62%
Bay of Plenty	-	-	51%	55%
Christchurch	25%	32%	24%	32%
Dunedin	-	-	29%	32%
Auckland	25%	35%	24%	29%
Wellington	26%	32%	23%	28%
Base: NZ Travellers	n=599	n=620	n=623	n=297



ACTIVITIES/EXPERIENCES ASSOCIATED WITH ROTORUA

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

Total Sample	YE Jun 2020	YE Jun 2021	YE Jun 2022
Volcanic & Geothermal	75%	70%	73%
Māori/Pacific Culture	68%	66%	64%
Scenic Sight-Seeing	58%	56%	52%
History & Heritage	53%	52%	51%
Spa & Wellness	53%	49%	47%
Family Activities	49%	48%	45%
Nature, Wildlife & Eco-tourism	45%	45%	39%
Walking & Hiking	44%	41%	38%
Gardens, Parks & Reserves	42%	39%	37%
Restaurants, Cafés & Bars	37%	39%	36%
Arts & Culture	35%	40%	35%
Cycling/Mountain Biking	34%	35%	32%
Adrenaline Activities	37%	35%	31%
Water-based Activities	24%	24%	20%
Golf, Fishing & Hunting	24%	25%	18%
Shopping	17%	18%	16%
Events, Concerts & Festivals	16%	16%	15%
Wineries	5%	6%	4%
Casinos/Gambling	4%	5%	4%
Skiing/Snowboarding	4%	4%	2%
Don't know/None of the above	4%	4%	3%
Base: Heard of Rotorua	n=2,485	n=2,482	n=1,158

Recent Visitors	YE Jun 2020	YE Jun 2021	YE Jun 2022
Volcanic & Geothermal	78%	79%	76%
	73%	74%	65%
Māori/Pacific Culture			
Scenic Sight-Seeing	65%	65%	62%
Spa & Wellness	63%	62%	57%
History & Heritage	59%	62%	54%
Family Activities	58%	59%	50%
Walking & Hiking	54%	52%	49%
Restaurants, Cafés & Bars	48%	49%	48%
Gardens, Parks & Reserves	52%	50%	46%
Nature, Wildlife & Eco-tourism	54%	56%	44%
Cycling/Mountain Biking	43%	50%	44%
Adrenaline Activities	49%	49%	41%
Arts & Culture	41%	46%	36%
Water-based Activities	31%	35%	27%
Golf, Fishing & Hunting	27%	31%	21%
Shopping	24%	24%	21%
Events, Concerts & Festivals	22%	23%	20%
Wineries	5%	7%	9%
Casinos/Gambling	5%	7%	4%
Skiing/Snowboarding	3%	5%	3%
Don't know/None of the above	1%	1%	1%
Base: Rotorua Visitors (P12M)	n=587	n=552	n=233





ROTORUA APPEAL

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

Total Sample	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Highly Appealing	40%	38%	37%	39%
Somewhat Appealing	44%	44%	43%	42%
Not very Appealing	12%	13%	13%	13%
Not at all Appealing	3%	3%	4%	5%
Don't know/NA	1%	2%	2%	1%
Base: Heard of Rotorua, excluding residents	n=2,441	n=2,450	n=2,457	n=3,689

Regional Benchmark
36%
41%
14%
4%
0%

Total Sample	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Highly Appealing	57%	54%	50%	57%
Somewhat Appealing	33%	38%	38%	35%
Not very Appealing	7%	5%	10%	6%
Not at all Appealing	2%	1%	2%	1%
Don't know/NA	1%	1%	0%	0%
Base: Visited Rotorua P12M	n=592	n=572	n=542	n=690

Regional Benchmark		
55%		
33%		
7%		
1%		
0%		



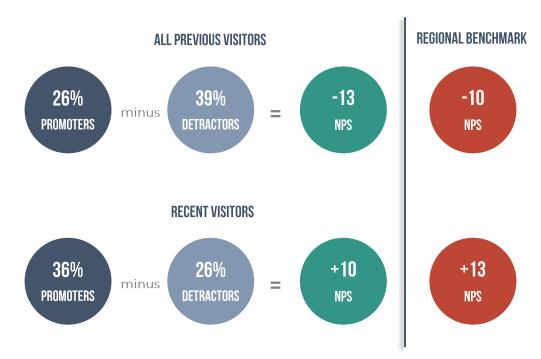
NET PROMOTER SCORE (NPS)



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 detractor.

		Visited Rotorua previously	Visited Rotorua recently (P12M)
Dramastara	10 (Extremely likely)	14%	20%
Promoters	9	12%	16%
D	8	19%	20%
Passive	7	17%	18%
	6	13%	12%
	5	11%	9%
	4	3%	2%
Detractors	3	4%	1%
	2	3%	1%
	1	1%	1%
	0 (Not at all likely)	4%	1%
	Base*:	n=759	n=152





PROPENSITY TO VISIT ROTORUA



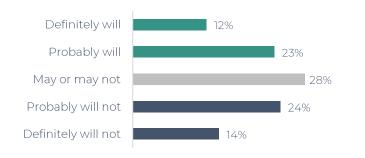


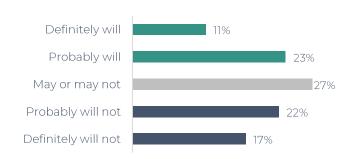
84%

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

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=3,134)

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

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Definitely will	14%	14%	13%	12%
Probably will	22%	23%	22%	23%
May or may not	29%	29%	30%	28%
Probably/Definitely will not	35%	34%	35%	36%
Base: Intend to travel domestically N12M, excl. residents, heard of Rotorua	n=2,109	n=2,136	n=2,145	n=3,134



FUTURE VISITOR PROFILE



	Total Sample (excl. residents)	'Definitely' will visit Rotorua (next 12 months)
Region of Residence		
Northland	4%	3%
Auckland	33%	37%
Waikato	10%	17%
Bay of Plenty	5%	15%
Tairāwhiti / Gisborne	1%	2%
Hawke's Bay	4%	3%
Taranaki	3%	1%
Manawatū-Whanganui	5%	4%
Wellington (& Wairarapa)	11%	8%
Tasman	1%	1%
Nelson	2%	1%
Marlborough	1%	0%
West Coast	1%	0%
Canterbury	13%	4%
Otago	5%	2%
Southland	2%	1%
Base:	n=3,723	n=378

	Total Sample (excl. residents)	'Definitely' will visit Rotorua (next 12 months)
Age		
18-19 years	3%	2%
20-29 years	18%	20%
30-39 years	17%	24%
40-49 years	16%	21%
50-59 years	17%	11%
60-69 years	14%	10%
70+ years	15%	12%
Household Composition		
My husband, wife or partner	63%	67%
My mother and/or father	8%	6%
My children aged under 5	11%	18%
My children aged 5 to 14	17%	29%
My children aged 15 or older	13%	13%
Other family/relatives	8%	7%
Other person(s)	8%	9%
None of the above – I live alone	12%	7%
Base:	n=3,723	n=378



BARRIERS TO VISITING ROTORUA

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

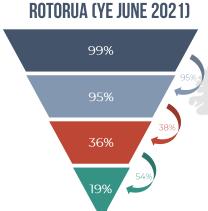




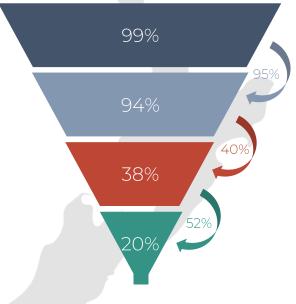


CONVERTING AWARENESS TO VISITATION

REGIONAL BENCHMARK







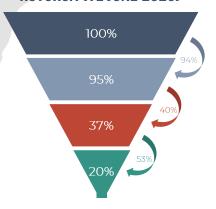
AWARENESS

Heard of Rotorua

APPEAL

PROPENSITY TO VISIT

ROTORUA (YE JUNE 2020)



ROTORUA (YE JUNE 2019)







ROTORUA UPDATE: YEAR ENDING JUNE 2022

The border closure during much of the reporting period has resulted in a relatively low sample size for the survey questions that relate to visitation.

Almost half of Australian travellers (45%) find Rotorua highly appealing, which is slighter higher than the regional benchmark of 40%.

'Hot springs', 'smelly', 'geysers', and 'mud' are the among the most common top-of-mind associations for Australian travellers thinking of Rotorua. Rotorua doesn't lead other New Zealand destinations as 'a great place to take the family' – Australian traveller more commonly associate this characteristic with Queenstown, Auckland, and Christchurch.

The activities/experiences most commonly associates with Rotorua are volcanic and geothermal, Māori/Pacific culture, nature, wildlife and eco-tourism, and scenic sightseeing.

Net Promoter Score (NPS) is used to measure previous visitors' propensity to recommend Rotorua as a travel destination. For the period April - June 2022, Rotorua's NPS amongst Australian travellers is +19, on par with the regional benchmark at +21.

One out of four Australian travellers intending to travel to New Zealand in next 12 month 'definitely will' visit Rotorua. The future visitor profile skews towards the 30-49 years age bracket and family composition of children aged under 15.





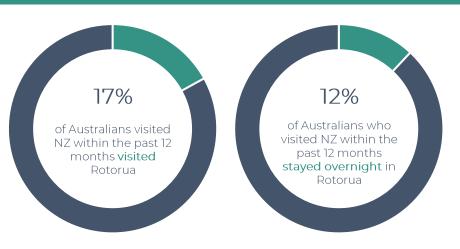
MARKET PENETRATION & FAMILARITY

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?



3%

of Australians surveyed visited New Zealand in the past 12 months



Familiarity	
I have visited Rotorua	33%
I have never visited, but do have some ideas about what you can do there	21%
I have never visited, and don't know much about what you can do there	28%
I have never heard of Rotorua	19%
Base: Total sample	n=3,712

Regional Benchmark	
21%	
18%	
32%	
29%	

Base: Travelled to NZ P12M (n=240)

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Visited Rotorua	29%	23%	17%	17%
Stayed Overnight in Rotorua	19%	15%	9%	12%
Base: Travelled to NZ P12M	n=508	n=530	n=479	n=240



VISITOR PROFILE



	Total Sample	Visited Rotorua (past 12 months)
Region of Residence		
Australian Capital Territory	2%	5%
New South Wales	32%	40%
Northern Territory	1%	0%
Queensland	20%	15%
South Australia	8%	13%
Tasmania	3%	3%
Victoria	24%	10%
Western Australia	10%	15%
Base:	n=3,712	n=40

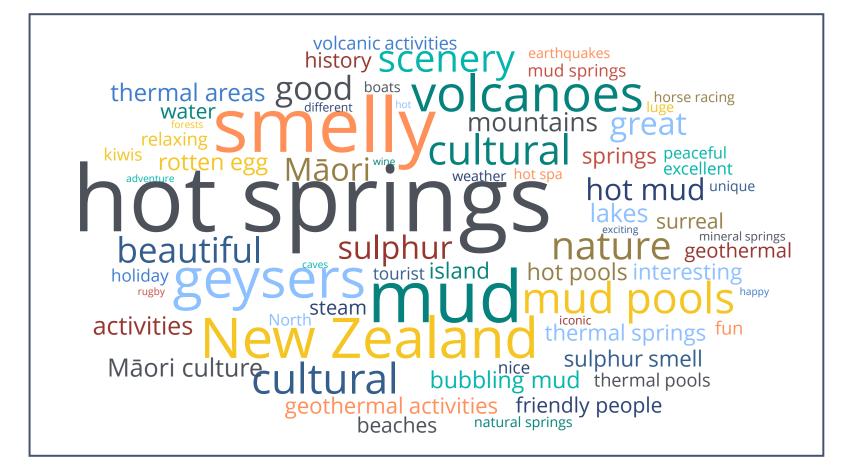
	Total Sample	Visited Rotorua (past 12 months)
Age		
18-19 years	4%	8%
20-29 years	16%	15%
30-39 years	18%	30%
40-49 years	18%	30%
50-59 years	16%	10%
60-69 years	14%	5%
70+ years	14%	3%
Household Composition		
My husband, wife or partner	60%	55%
My mother and/or father	6%	13%
My children aged under 5	11%	8%
My children aged 5 to 14	21%	48%
My children aged 15 or older	15%	18%
Other family/relatives	7%	5%
Other person(s)	4%	10%
None of the above – I live alone	16%	15%
Base:	n=3,712	n=40



ROTORUA POSITIONING



What is the first thing that comes to mind when you think about Rotorua?



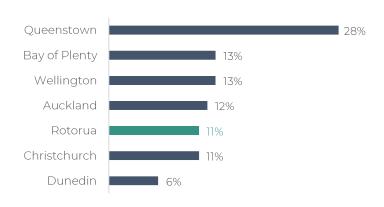


PERCEPTIONS OF ROTORUA

Which (if any) of the following regions...?

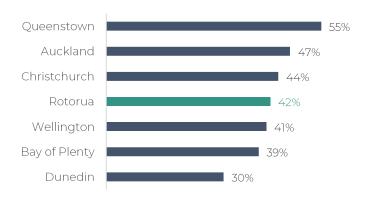


IS A TOP MOUNTAIN BIKING DESTINATION



	Q1 2018	Q1 2019	Q1 2020	Q1 2021	Q1 2022
Queenstown	26%	24%	31%	25%	28%
Bay of Plenty	-	-	-	11%	13%
Wellington	8%	10%	9%	13%	13%
Auckland	7%	10%	10%	15%	12%
Rotorua	11%	9%	13%	12%	11%
Christchurch	9%	12%	9%	14%	11%
Dunedin	-	-	-	7%	6%
Base: AU Travellers	n=613	n=587	n=612	n=428	n=308

IS A GOOD PLACE TO TAKE THE FAMILY ON HOLIDAY



	Q2 2018	Q2 2019	Q2 2020	Q2 2021	Q2 2022
Queenstown	51%	52%	46%	46%	55%
Auckland	53%	53%	46%	44%	47%
Christchurch	45%	46%	40%	39%	44%
Rotorua	43%	40%	34%	36%	42%
Wellington	46%	43%	38%	39%	41%
Bay of Plenty	-	-	-	36%	39%
Dunedin	-	-	-	25%	30%
Base: AU Travellers	n=617	n=616	n=620	n=608	n=324

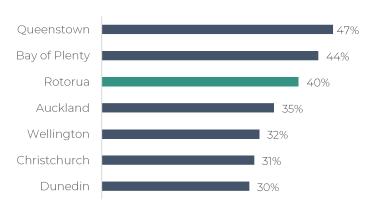


PERCEPTIONS OF ROTORUA

Which (if any) of the following regions...?

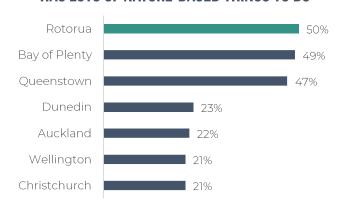


IS A PLACE YOU CAN RELAX AND UNWIND



	Q3 2018	Q3 2019	Q3 2020	Q3 2021
Queenstown	49%	46%	42%	47%
Bay of Plenty	-	-	-	44%
Rotorua	41%	39%	32%	40%
Auckland	43%	41%	39%	35%
Wellington	33%	38%	33%	32%
Christchurch	39%	41%	38%	31%
Dunedin	-	-	29%	30%
Base: AU Travellers	n=585	n=609	n=589	n=281

HAS LOTS OF NATURE-BASED THINGS TO DO



	Q4 2018	Q4 2019	Q4 2020	Q4 2021
Rotorua	51%	48%	39%	50%
Bay of Plenty	-	-	40%	49%
Queenstown	48%	51%	38%	47%
Dunedin	-	-	21%	23%
Auckland	29%	28%	26%	22%
Wellington	25%	26%	23%	21%
Christchurch	26%	27%	24%	21%
Base: AU Travellers	n=596	n=606	n=612	n=308



ACTIVITIES / EXPERIENCES ASSOCIATED WITH ROTORUA

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

Total Sample	YE Jun 2020	YE Jun 2021	YE Jun 2022
Volcanic & Geothermal	48%	42%	47%
Māori/Pacific Culture	38%	34%	36%
Nature, Wildlife & Eco-tourism	36%	28%	30%
Scenic Sight-Seeing	36%	31%	29%
History & Heritage	32%	26%	26%
Walking & Hiking	30%	24%	26%
Spa & Wellness	30%	24%	22%
Gardens, Parks & Reserves	23%	18%	18%
Family Activities	20%	19%	17%
Restaurants, Cafés & Bars	19%	16%	16%
Arts & Culture	18%	17%	14%
Shopping	11%	12%	10%
Water-based Activities	12%	12%	10%
Adrenaline Activities	14%	11%	10%
Cycling/Mountain Biking	13%	11%	10%
Golf, Fishing & Hunting	12%	11%	9%
Events, Concerts & Festivals	8%	9%	7%
Wineries	8%	8%	7%
Skiing/Snowboarding	6%	7%	5%
Casinos/Gambling	4%	6%	3%
Don't know/None of the above	16%	16%	17%
Base: Heard of Rotorua	n=2,138	n=2,143	n=1,221





ROTORUA APPEAL



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

Total Sample	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Highly Appealing	42%	40%	42%	45%
Somewhat Appealing	40%	40%	38%	39%
Not very Appealing	7%	9%	8%	7%
Not at all Appealing	2%	3%	4%	2%
Don't know/NA	9%	8%	8%	7%
Base: Heard of Rotorua	n=2,123	n=2,138	n=2,143	n=3,021

Regional Benchmark
40%
42%
6%
2%
0%

Total Sample	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Highly Appealing	67%	61%	72%	69%
Somewhat Appealing	23%	33%	22%	26%
Not very Appealing	8%	7%	4%	3%
Not at all Appealing	1%	0%	0%	3%
Don't know/NA	1%	0%	3%	0%
Base: Visited Rotorua P12M	n=146	n=122	n=74	n=39

Regional Benchmark
67%
25%
4%
3%
0%



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	1
previously	

		[
Duamatana	10 (Extremely likely)	25%
Promoters	9	14%
Passive	8	26%
Passive	7	15%
	6	8%
	5	6%
	4	1%
Detractors	3	1%
	2	1%
	٦	0%
	0 (Not at all likely)	3%
	Base*:	n=295





PROPENSITY TO VISIT ROTORUA

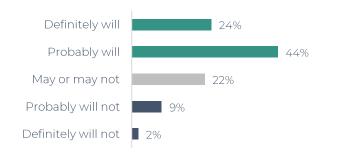


How likely are you to visit Rotorua within the next 12 months? (for any reason / for leisure purposes)

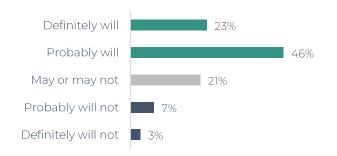
36%

of Australian travellers intend to visit NZ in the next 12 months (i.e. definitely / probably will travel around NZ $^{\prime}$

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=1,138)

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

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022
Definitely will	16%	20%	28%	24%
Probably will	38%	36%	35%	44%
May or may not	31%	28%	24%	22%
Probably/Definitely will not	16%	16%	13%	11%
Base: Intend to travel to NZ N12M, heard of Rotorua	n=803	n=793	n=939	n=1,138



FUTURE VISITOR PROFILE



	Total Sample	'Definitely' will visit Rotorua (next 12 months)
Region of Residence		
Australian Capital Territory	2%	2%
New South Wales	32%	32%
Northern Territory	1%	1%
Queensland	20%	16%
South Australia	8%	6%
Tasmania	3%	3%
Victoria	24%	27%
Western Australia	10%	11%
Base:	n=3,712	n=293

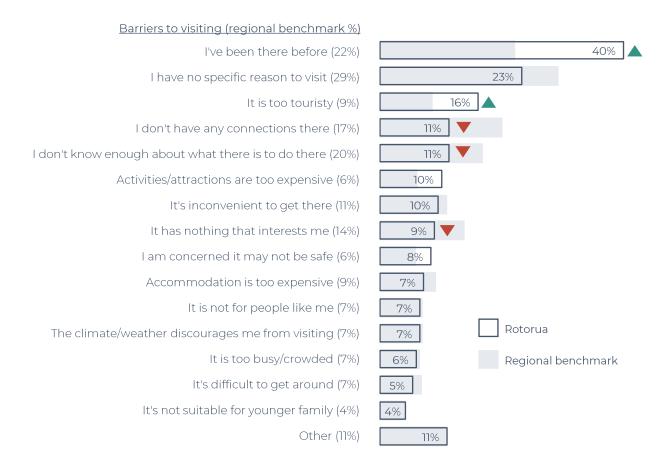
	Total Sample	'Definitely' will visit Rotorua (next 12 months)
Age		
18-19 years	4%	3%
20-29 years	16%	17%
30-39 years	18%	25%
40-49 years	18%	27%
50-59 years	16%	11%
60-69 years	14%	11%
70+ years	14%	6%
Household Composition		
My husband, wife or partner	60%	68%
My mother and/or father	6%	5%
My children aged under 5	11%	16%
My children aged 5 to 14	21%	40%
My children aged 15 or older	15%	16%
Other family/relatives	7%	5%
Other person(s)	4%	3%
None of the above – I live alone	16%	9%
Base:	n=3,712	n=293



BARRIERS TO VISITING ROTORUA



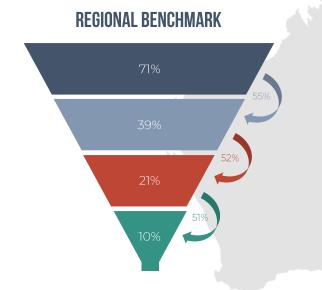
You mentioned that you are unlikely to visit Auckland within the next 12 months. Why is that?

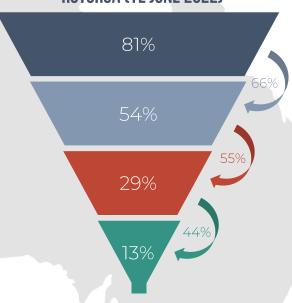




CONVERTING AWARENESS TO VISITATION

ROTORUA (YE JUNE 2022)







Heard of Rotorua

KNOWLEDGE

Visited Rotorua or have some ideas about what to do there

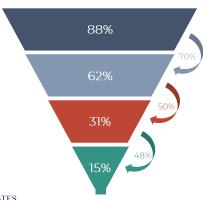
APPEAL

Consider Rotorua to be 'highly appealing

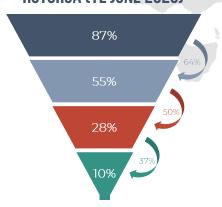
PROPENSITY TO VISIT

Will probably/ definitely visit Rotorua in next 12 months

ROTORUA (YE JUNE 2021)



ROTORUA (YE JUNE 2020)



ROTORUA (YE JUNE 2019)

