

Highlights

- The current Quarterly Focus examines the booking patterns of New Zealand's major international markets. It highlights a number of significant differences between markets that will be of interest to those targeting what is a growing proportion of international visitors booking accommodation, local transport and/or activities/attractions ahead of arrival. For example, it demonstrates that a steady increase in the pre-booking of accommodation is driven principally by the Australian market, with North American visitors bucking the overall trend. It also indicates that, against the backdrop of a trend toward online booking, travel agents are holding share in some markets and some product segments, while losing share in others. For further information on booking patterns, refer to the Quarterly Focus on page 7.
- The proportion of holiday visitors to Dunedin has stabilised in the most recent year following a slight downward trend which is also evident in other regions.
- While Dunedin's unique attractions have remained the major drawcard for visitors over time, fluctuations in their importance as holiday motivators suggests scope to promote these attributes further. This is especially important given that the region's particular attractions, and its reputation as a unique destination, remain significant differentiators from other regions.
- Expectations of finding a 'clean and pure' environment are increasing amongst visitors to Dunedin. However, visitor ratings of Dunedin's environmental performance have declined slightly in the most recent year. Verbatim comments and feedback on aspects of Dunedin's infrastructure – including street cleaning and waste disposal facilities – provide some clue to the issues but future monitoring is advised given the importance of environmental performance to Dunedin's visitors and to the region's overall market positioning.
- In this context, it is also worth noting a downward trend in visitor expectations of finding 'unique wildlife' in the region – a traditional strength of Dunedin and an important component of the destination's positioning.
- Demand for pre-trip information about Dunedin's activities and attractions is continuing to grow over time, as is demand for information about the weather (possibly as a consequence). More significantly, the proportion of visitors booking activities and attractions prior to arrival has also strengthened of late. This behaviour is also reflected in the RVM expenditure data via an increase in the proportion of visitors spending on activities and attractions and an increase in the average amount spent.
- Encouragingly, intended duration of stay in Dunedin continues to exceed the benchmark in the domestic market, and, as it trends upwards, moves closer to the benchmark for the international market. This is at a time when the intended duration of stay at the benchmark level is relatively static for international visitors and shortening in the domestic market.
- RVM results continue to indicate that an increasing proportion of visitors are arriving in Dunedin by private and rental vehicle, and fewer by air. This trend is at odds with the benchmark data which shows an increase in the proportion of visitors travelling on domestic flights. As previously suggested, this shift may present opportunities for operators who are reliant on customers having access to their own transport.
- Relative to their peers in other regions, visitors to Dunedin are more likely to participate in cultural/heritage/educational activities, to visit natural attractions, and/or to undertake activities which involve viewing, learning about or interacting with birds or animals. In terms of visitor satisfaction, the specific activities/attractions rating most highly include iconic Dunedin attractions such as the Taieri Gorge Railway, Olveston House, Otago Museum and Otago Settlers Museum.
- The first year-on-year data is now available in response to the RVM questions concerning environmental sustainability. As indicated above, the latest results suggest that environmentally-friendly travel is slightly more important to Dunedin's visitors than it is to visitors to other regions, and that this importance may be growing over time. Ratings of Dunedin's environmental performance currently sit behind the benchmark and have decreased in the most recent year. This 'mismatch' in importance and performance may become problematic if it continues and future monitoring will help to inform on progress.
- Visitor satisfaction with most aspects of the Dunedin visitor experience has held relatively steady in the most recent year. Specific changes worth noting however are a decrease in satisfaction with backpacker accommodation, relatively low ratings of flights as a mode of transport and also airport facilities, and increasing

disappointment with the cleanliness of city streets and waste disposal facilities. These factors may explain the slight decrease in overall satisfaction in the most recent year from 8.3 out of 10 to 8.2 out of 10 – a measure which had held steady for the previous 24 months. The slight decrease in the proportion of visitors ‘very interested’ in returning to Dunedin may also be a reflection of this change.

- Finally, the latest year’s results suggest a slight decline in the proportion of visitors spending on accommodation and food/meals/drinks. Whilst expenditure on activities and attractions has strengthened, the gap between average daily expenditure by visitors to Dunedin (\$146.42) and the benchmark (\$179.94) has widened in the most recent year. There is some evidence to suggest that visitors may be economising in their expenditure on accommodation and food and drinks in order to spend on attractions and activities and gifts and souvenirs. Future monitoring will provide more insight as to whether this is the case.