

# Highlights

- The current Quarterly Focus examines the needs and characteristics of the international backpacker market. This market most often originates from the United Kingdom or Europe, tends to be much younger, on average, than other international visitors and tends to travel alone or with friends. Challenging a common view of backpackers as the ultimate FITs (i.e. visitors who simply plan and purchase as they go) RVM results show the proportion of backpackers booking at least one product/service ahead of their arrival (at 69%) is similar to that of other international visitors (67%). For further information on the needs and characteristics of the international backpacker market refer to the Quarterly Focus on page 7.
- The proportion of VFR travellers to Dunedin continues to increase, driven mainly by the domestic market. However, almost a quarter of Australian visitors to Dunedin are travelling to visit friends or family. The strength of Dunedin's VFR market continues to set it apart from other RVM regions.
- The proportion of Australian visitors who are **returning** to Dunedin for a second or subsequent visit has grown substantially over time although this trend has reversed slightly in the most recent year. Interestingly, almost a quarter of the visitors from other international markets who were interviewed in the last 12 months were also on a second or subsequent visit to the region.
- A growing proportion of Dunedin's holiday visitors are drawn to the region by the desire to explore what they see as a 'unique' destination. Those motivated by a desire to have fun and socialise are also on the rise. However, Dunedin's natural attractions continue to be the major drawcard for holiday visitors and for those from international markets in particular.
- When asked what they **expected** to find in Dunedin (before they arrived), a growing proportion of visitors have nominated 'a relaxing place to visit'. In contrast, fewer are expecting to encounter 'unique wildlife' in the region although expectations in this regard do remain high amongst visitors originating from international markets other than Australia.
- Demand for pre-trip information about Dunedin's activities and attractions continues to grow over time, driven primarily by Australian and other international markets. Demand for information about accommodation is consistently high across all major market segments. International visitors (and particularly those from markets other than Australia) rely heavily on guide/travel books for this information. Use of i-sites is also high amongst 'rest of world' markets. In contrast, online channels are dominant in the domestic market.
- The proportion of visitors pre-booking accommodation has fallen slightly in the most recent year. More visitors arrive in Dunedin without any bookings (accommodation, transport, activities and attractions) than is the case in other regions. Amongst those who do book prior to arriving in Dunedin, online channels are the dominant method for booking accommodation, local transport and activities and attractions. However, travel agents remain a vital channel for operators targeting the Australian market.
- Dunedin is the sole destination for just over 40% of its domestic visitors but less than 10% of its Australian visitors and an even smaller proportion of visitors from other international markets. International visitors most often couple a visit to Dunedin with a visit to Canterbury and Southland.
- While motels remain the most popular form of commercial accommodation for visitors to Dunedin, their market share appears to be waning over time. Domestic and Australian visitors show a strong preference for motels over other commercial accommodation options, while visitors from other international markets tend to favour backpackers/hostels.
- Sightseeing is by far the most common activity undertaken by visitors to Dunedin. Analysis of activities by market reveals that Australian visitors are less likely to participate in a range of activities – including visits to natural attractions, walking/hiking/climbing, viewing birds/animals and water activities – than their peers from other international markets.
- The latest RVM results show that whilst currently a lower priority, being environmentally-friendly while travelling is more important to Dunedin's visitors than it is to visitors to other RVM regions. In this context, it is interesting to note that ratings of Dunedin's environmental performance are currently lower than those of other regions as a whole.

- While overall visitor satisfaction is typically high – and especially in the domestic market – it is worth noting that the proportion of visitors who express a strong interest in returning to Dunedin is lower than other regions. This suggests that Dunedin may be viewed as a ‘once in a lifetime’ destination (particularly by international markets), with little to draw visitors back for a second or subsequent visit.
- Dunedin’s ratings on core destination attributes are largely stable, with the region receiving highest ratings from visitors for its friendly locals, beautiful scenery and safety/security. In the context of other regions, Dunedin is most highly regarded for the uniqueness of its wildlife. However, it is worth noting that Rotorua currently shares the lead with Dunedin on this attribute.
- The proportion of visitors spending on activities and attractions continued to rise in the most recent year. However, average daily expenditure on accommodation by visitors to Dunedin is declining. In both categories, average expenditure remained well down on averages for other regions over the last 12 months.
- Finally, a question which asks visitors whether they felt they had sufficient time on their trip to experience all the things they wanted to see and do in Dunedin has produced some valuable results over the last 12 months. Results show that Australian visitors express most regret with regard to the time they have available. This suggests that efforts to better inform the Australian market (and to facilitate greater planning and booking by Australian visitors) may encourage longer stays in the region and participation in a wider range of activities.