**VISITOR INSIGHTS PROGRAMME** 

# MARKET PERCEPTIONS: DUNEDIN

JULY - DECEMBER 2020



VISITOR 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=4,800 New Zealand and Australian travellers are included in the programme each year (a monthly sample of n=200 New Zealanders and n=200 Australians), recruited via Dynata's consumer panel. Respondents must be aged 18+ years and must have travelled overnight within 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.

Dunedin NZ joined the Market Perceptions programme in July 2020.

The 'regional benchmark' referenced in this report is the average across five regions - Auckland, Rotorua, Wellington, Christchurch and Queenstown.

For more information about this research please contact:

Dunedin NZ

Angus & Associates

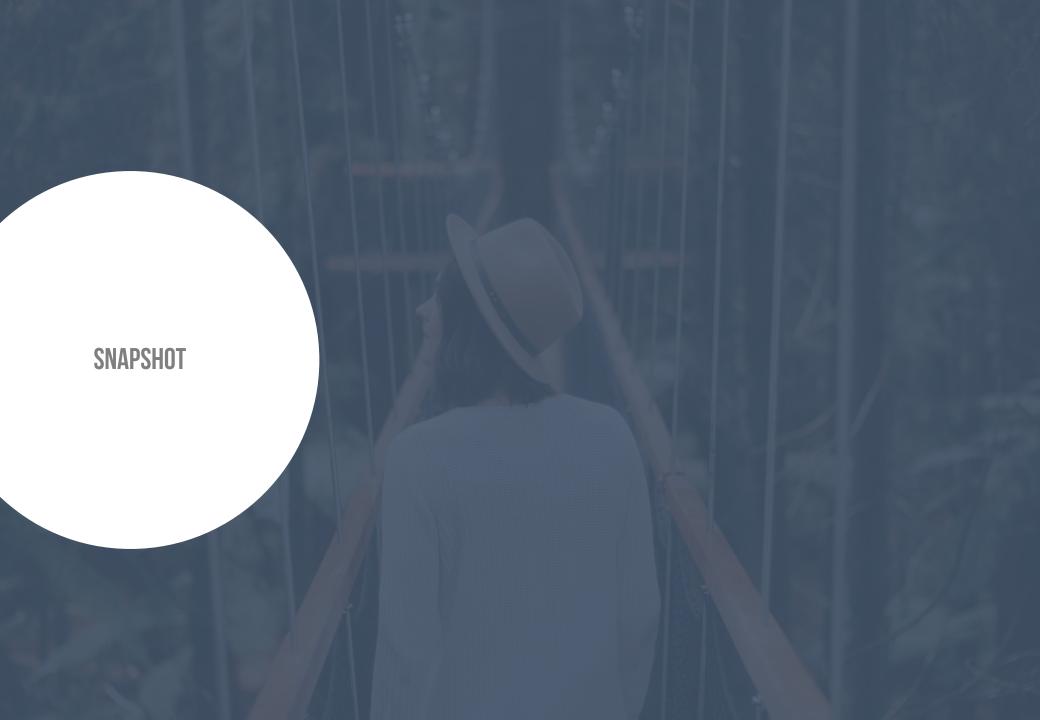
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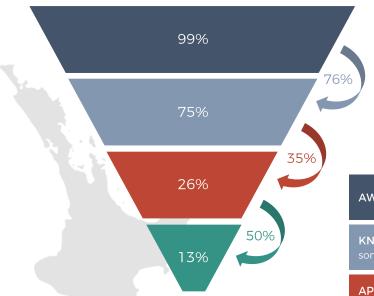
### **SNAPSHOT (YE DECEMBER 2020)**

### **NEW ZEALAND TRAVELLERS**

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



12% of New Zealanders (excluding Dunedin residents) who travelled domestically around New Zealand in the past 12 months visited Dunedin



AWARENESS: Heard of Dunedin

**KNOWLEDGE**: Visited Dunedin or have some ideas about what to do there

**APPEAL:** Consider Dunedin to be 'highly appealing'

PROPENSITY TO VISIT: Will probably/ definitely visit Dunedin in next 12 months

New Zealand travellers associate Dunedin with...



**50%** History & Heritage



38% Gardens, Parks & Reserves



**38%** Restaurants, Cafes & Bars



33% Arts & Culture



28% Family Activities



28% Events, Concerts & Festivals



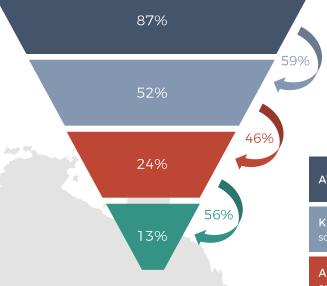
31% of New Zealand travellers agree that Dunedin is a vibrant city/town full of hidden gems

### **SNAPSHOT (YE DECEMBER 2020)**

### **AUSTRALIAN TRAVELLERS**



13% of Australians have travelled to New Zealand in the past 12 months



AWARENESS: Heard of Dunedin

**KNOWLEDGE**: Visited Dunedin or have

APPEAL: Consider Dunedin to be 'highly appealing'

PROPENSITY TO VISIT: Will probably/ definitely visit Dunedin in next 12 months



16% of Australians who travelled to New Zealand in the past 12 months visited Dunedin

Australian travellers associate Dunedin with...



28% History & Heritage



22% Gardens. Parks & Reserves



**101** 22% Restaurants, Cafes & Bars



21% Scenic Sight-Seeing



21% Walking & Hiking



19% of Australian travellers agree that Dunedin is a vibrant city/town full of hidden gems



### **UPDATE: JULY — DECEMBER 2020**

While the percentage of New Zealanders (aged 18+) travelling domestically around New Zealand remains stable at 75%, the past 6 months have been influenced by increased profile of domestic travel as well as increased domestic competition and destination marketing by other regions. Of the New Zealanders who have travelled domestically in the past 12 months, 12% visited Dunedin.

Canterbury, Auckland and Southland are the three key domestic travel markets for Dunedin. Dunedin attracts a broad range of visitors, with no significant skews in the age profile of visitors versus general population of New Zealand travellers.

Half of all New Zealand travellers associate Dunedin with history and heritage. Other key associations include gardens/parks/reserves, restaurants/cafes/bars and arts/culture. Those who have recently visited Dunedin are more likely to associate the city with family activities and events, concerts and festivals, highlighting opportunities to further profile these aspects of Dunedin.

The proposition that Dunedin is a vibrant city and full of hidden gems is not a unique positioning for Dunedin, with Dunedin ranking fifth of six destinations.

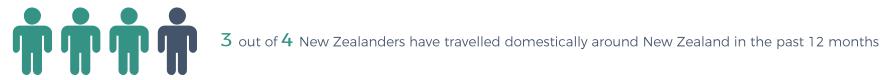
Although the proportion who find Dunedin highly appealing as a destination for a short break or holiday sits below the regional benchmark at 30%, this increases to 52% amongst those who have recently visited Dunedin. This difference indicates Dunedin should gain from strong advocacy and word of mouth promotion.



### **MARKET PENETRATION**



In the past 12 months, where (if anywhere) have you travelled? Please include any trips (i.e. holiday, business, or any other reason) where you have travelled away from home and stayed for at least one night.



12% of New Zealanders (excluding Dunedin residents) who travelled domestically within the past 12 months visited Dunedin

> 9% of New Zealanders (excluding Dunedin residents) who travelled domestically within the past 12 months stayed overnight in Dunedin

# **VISITOR PROFILES**



Which of the following regions in New Zealand have you visited in the past 12 months? Please include both daytrips and overnight trips And which of the following regions have you stayed overnight in during the past 12 months?

	Total Sample	Visited Dunedin (Past 12 Months)
Region of Residence	%	%
Northland	4	1
Auckland	32	22
Waikato	9	5
Bay of Plenty	7	5
Gisborne	1	0
Hawke's Bay	4	1
Taranaki	3	0
Manawatu-Whanganui	6	3
Wellington (& Wairarapa)	11	8
Tasman	1	1
Nelson	2	1
Marlborough	1	2
West Coast	1	2
Canterbury	12	26
Otago	5	8
Southland	2	13
Base: YE December 2020	n=2499	n=254

	Total Sample	Visited Dunedin (Past 12 Months)
Age	%	%
18-19 years	4	5
20-29 years	17	15
30-39 years	17	17
40-49 years	18	16
50-59 years	17	13
60-69 years	14	19
70+ years	13	15
Household Composition	%	%
My husband, wife or partner	63	69
My mother and/or father	7	6
My children aged under 5	13	11
My children aged 5 to 14	17	16
My children aged 15 or older	14	15
Other family/relatives	9	7
Other person(s)	8	11
None of the above - I live alone	14	13
Base: YE December 2020	n=2499	n=254

### **FAMILARITY WITH DUNEDIN**





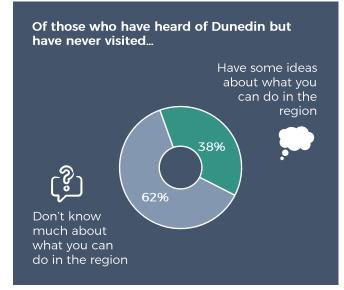


**60%** of New Zealand travellers have visited Dunedin

39% of New Zealand travellers have heard of Dunedin but have never visited



1% of New Zealand travellers haven't heard of Dunedin



Base: Total Sample Jul-Dec 2020 Excluding Residents (n=1202)

# **EXPERIENCES ASSOCIATED WITH DUNEDIN**

### Which (if any) of the following activities or experiences do you associate with Dunedin?

Total Sample	Jul-Dec 2020 %
History & Heritage	50
Gardens, Parks & Reserves	38
Restaurants, Cafés & Bars	38
Arts & Culture	33
Events, Concerts & Festivals	28
Family Activities	28
Walking & Hiking	27
Nature, Wildlife & Eco-tourism	26
Scenic Sight-Seeing	22
Shopping	22
Cycling/Mountain Biking	17
Golf, Fishing & Hunting	13
Water-based Activities	10
Casinos/Gambling	9
Spa & Wellness	7
Wineries	7
Māori/Pacific Culture	5
Skiing/Snowboarding	5
Adrenaline Activities	4
Volcanic & Geothermal	3
None of the above	4
Don't know	19
Base: Total Sample (Heard of Dunedin)	n=1239

Recent Visitors	Jul-Dec 2020 %
History & Heritage	69
Restaurants, Cafés & Bars	67
Gardens, Parks & Reserves	60
Family Activities	54
Arts & Culture	53
Events, Concerts & Festivals	51
Walking & Hiking	48
Shopping	44
Nature, Wildlife & Eco-tourism	43
Scenic Sight-Seeing	34
Cycling/Mountain Biking	25
Casinos/Gambling	24
Golf, Fishing & Hunting	22
Water-based Activities	17
Spa & Wellness	11
Māori/Pacific Culture	9
Wineries	8
Adrenaline Activities	5
Volcanic & Geothermal	4
Skiing/Snowboarding	1
None of the above	2
Don't know	4
Base: Visited Dunedin in Past 12 Months	n=146

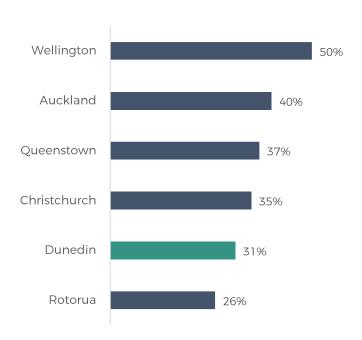


# PERCEPTIONS OF DUNEDIN

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



### IS A VIBRANT CITY/TOWN FULL OF HIDDEN GEMS



Base: July - December 2020 (n=1248)

# **DUNEDIN APPEAL**

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

Total Samp	ple	Jul-Dec 2020 %
	Highly Appealing	30
	Somewhat Appealing	43
	Not very Appealing	17
	Not at all Appealing	6
?	Don't know/NA	3
Base: Hea	rd of Dunedin (excl. residents)	n=1193

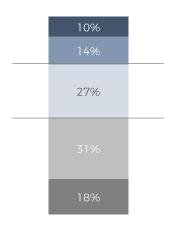
Recent Vis	itors	Jul-Dec 2020 %
<b>:</b>	Highly Appealing	52
	Somewhat Appealing	39
	Not very Appealing	
	Not at all Appealing	
?	Don't know/NA	0
Base: Visit	ed Dunedin in Past 12 Months	n=129

Regional Benchmark
41
38
14
6
2



# PROPENSITY TO VISIT DUNEDIN

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



Total Sample	Jul-Dec 2020 %
Definitely will	10
Probably will	14
May or may not	27
Probably will not	31
Definitely will not	18
Base: Total Sample (excl. residents)	n=1227



# **CONVERTING AWARENESS TO VISITATION**

### **AWARENESS**

Heard of Dunedin

### KNOWLEDGE

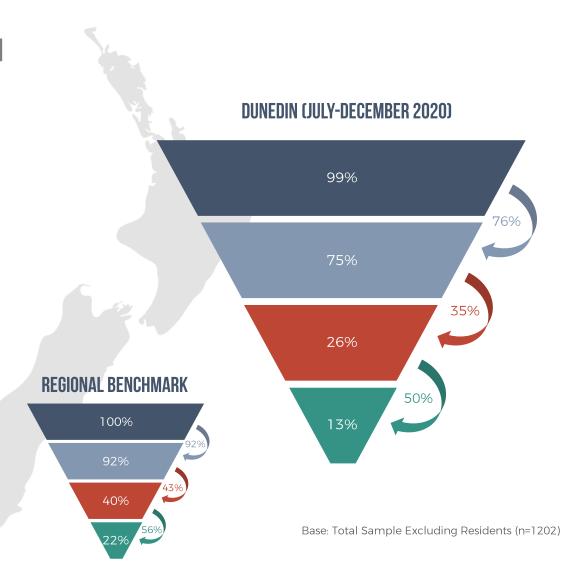
Visited Dunedin or have some ideas about what to do there

### APPEAL

Consider Dunedin to be 'highly appealing'

### PROPENSITY TO VISIT

Will probably/definitely visit Dunedin in next 12 months





### **UPDATE: JULY — DECEMBER 2020**

Visitation measures in the Market Perceptions programme include the 12-months prior to survey completion and so include travel that occurred from January 2019 onwards. With travel to/from Australia disrupted from March 2020 onwards due to the COVID-19 pandemic, the proportion of Australians reporting that they have visited New Zealand is lower than it otherwise would be. Awareness of Dunedin and propensity to visit results need to be understood in the context of a locked-out country, however perceptions remain valid and important for the impending opening of the border.

16% of Australians who travelled to New Zealand 'recently' (January 2019 onwards), visited Dunedin. Dunedin attracts a broad range of visitors from throughout Australia but does skew towards an older visitor profile with a significantly higher proportion of visitors aged 60+ years compared to the general population of Australian travellers.

Dunedin is known for history/heritage. Gardens, parks & reserves are also a key association, especially among those who have visited the city.

The proposition that Dunedin is a vibrant city full of hidden gems does not resonate with Australian travellers, with Dunedin ranking last of six destinations.

The conversion from knowledge to appeal and from appeal to propensity to visit, while slightly behind the regional benchmark, puts Dunedin in a more competitive position in the Australian market than domestically.



### **MARKET PENETRATION**



In the past 12 months, where (if anywhere) have you travelled? Please include any trips (i.e. holiday, business, or any other reason) where you have travelled away from home and stayed for at least one night.



13% of Australians have travelled to New Zealand in the past 12 months

16% of Australians who travelled to New Zealand in the past 12 months visited Dunedin



# **VISITOR PROFILES**



Which of the following regions in New Zealand have you visited in the past 12 months? Please include both daytrips and overnight trips And which of the following regions have you stayed overnight in during the past 12 months?

	Total Sample	Visited Dunedin (Past 12 Months)
Region of Residence	%	%
Australian Capital Territory	2	1
New South Wales	31	37
Northern Territory	1	1
Queensland	20	20
South Australia	8	2
Tasmania	3	2
Victoria	25	27
Western Australia	10	10
Base: YE December 2020	n=2443	n=82

	Total Sample	Visited Dunedin (Past 12 Months)
Age	%	%
18-19 years	3	1
20-29 years	18	10
30-39 years	19	12
40-49 years	18	9
50-59 years	16	17
60-69 years	13	22
70+ years	14	29
Household Composition	%	%
My husband, wife or partner	62	78
My mother and/or father	8	7
My children aged under 5	10	5
My children aged 5 to 14	19	16
My children aged 15 or older	14	17
Other family/relatives	8	2
Other person(s)	5	4
None of the above - I live alone	15	7
Base: YE December 2020	n=2443	n=82

### **FAMILARITY WITH DUNEDIN**





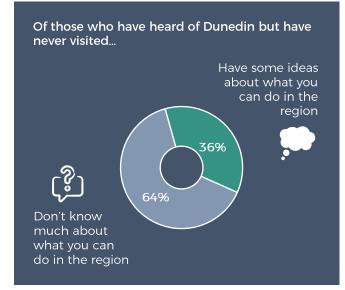


**32%** of Australian travellers have visited Dunedin

55% of Australian travellers have heard of Dunedin but have never visited



13% of Australian travellers haven't heard of Dunedin



Base: Total Sample Jul-Dec 2020 (n=1207)

# **EXPERIENCES ASSOCIATED WITH DUNEDIN**

Which (if any) of the following activities or experiences do you associate with Dunedin?

Total Sample	Jul-Dec 2020 %
History & Heritage	28
Gardens, Parks & Reserves	22
Restaurants, Cafés & Bars	22
Scenic Sight-Seeing	21
Walking & Hiking	21
Nature, Wildlife & Eco-tourism	19
Arts & Culture	17
Shopping	17
Family Activities	16
Māori/Pacific Culture	12
Events, Concerts & Festivals	11
Cycling/Mountain Biking	11
Golf, Fishing & Hunting	11
Water-based Activities	11
Wineries	11
Adrenaline Activities	9
Spa & Wellness	9
Volcanic & Geothermal	9
Casinos/Gambling	7
Skiing/Snowboarding	7
None of the above	2
Don't know	31
Base: Total Sample (Heard of Dunedin)	n=1053

Recent Visitors	Jul-Dec 2020 %
History & Heritage	72
Gardens, Parks & Reserves	66
Arts & Culture	47
Restaurants, Cafés & Bars	47
Walking & Hiking	47
Nature, Wildlife & Eco-tourism	44
Family Activities	38
Scenic Sight-Seeing	38
Events, Concerts & Festivals	31
Golf, Fishing & Hunting	28
Cycling/Mountain Biking	22
Volcanic & Geothermal	22
Shopping	19
Spa & Wellness	19
Water-based Activities	19
Wineries	19
Adrenaline Activities	16
Casinos/Gambling	13
Māori/Pacific Culture	13
Skiing/Snowboarding	9
Don't know	3
None of the above	0
Base: Visited Dunedin in Past 12 Months	n=32*

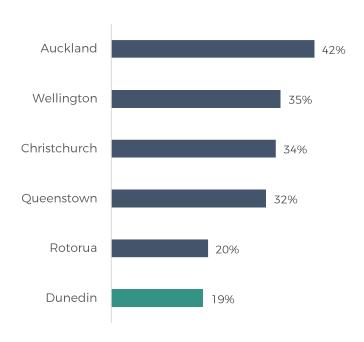


# PERCEPTIONS OF DUNEDIN

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



### IS A VIBRANT CITY/TOWN FULL OF HIDDEN GEMS



Base: July - December 2020 (n=1201)

# **DUNEDIN APPEAL**

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



Total Sam	ple	Jul-Dec 2020 %
	Highly Appealing	35
	Somewhat Appealing	40
	Not very Appealing	11
<u></u>	Not at all Appealing	4
?	Don't know/NA	10
Base: Heard of Dunedin		n=1053

Regional Benchmark
42
40
8
3
7

Recent Visitors		Jul-Dec 2020 %
<b>©</b>	Highly Appealing	69
	Somewhat Appealing	31
	Not very Appealing	0
	Not at all Appealing	0
?	Don't know/NA	0
Base: Visited Dunedin in Past 12 Months		n=32*

\*Caution: Small Base Size

# PROPENSITY TO VISIT DUNEDIN

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



11%	
 13%	
19%	
29%	

Total Sample	Jul-Dec 2020 %
Definitely will	11
Probably will	13
May or may not	19
Probably will not	28
Definitely will not	29
Base: Total Sample	n=1377

12%	
 15%	
21%	
20%	

Heard of Dunedin	Jul-Dec 2020 %
Definitely will	12
Probably will	15
May or may not	21
Probably will not	32
Definitely will not	20
Base: Heard of Dunedin	n=1223

# **CONVERTING AWARENESS TO VISITATION**

### **AWARENESS**

Heard of Dunedin

### KNOWLEDGE

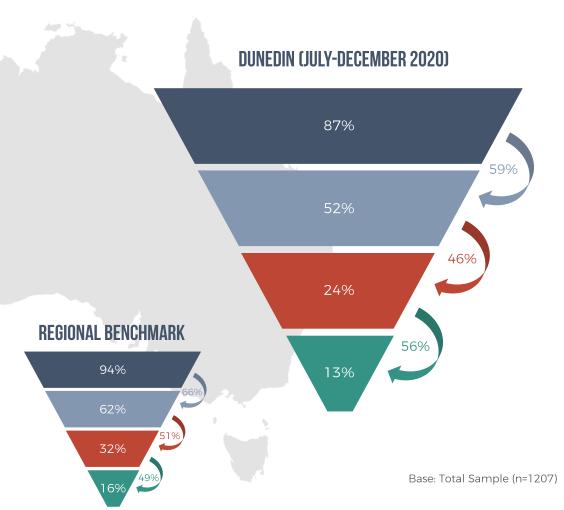
Visited Dunedin or have some ideas about what to do there

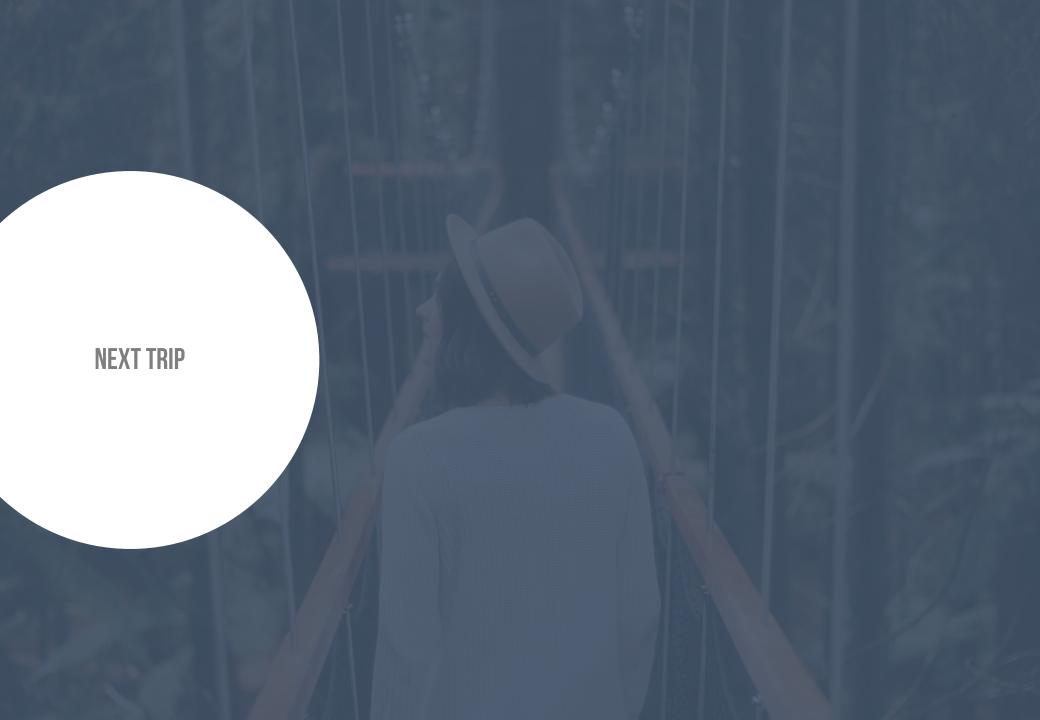
### APPEAL

Consider Dunedin to be 'highly appealing'

### PROPENSITY TO VISIT

Will probably/definitely visit Dunedin in next 12 months





### **NEXT TRIP**

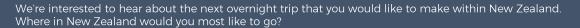
In April 2020 a new module was added to the Market Perceptions programme to evaluate New Zealanders' domestic travel aspirations in the post-COVID19 lockdown environment. These questions explore the next overnight domestic trip that New Zealanders would like to make. The following slides provide an overview of these questions for the October-December 2020 period. The additional analysis in green boxes provides details for the Otago region (note that this analysis is based on the entire Otago region including Dunedin).

Most New Zealanders are open to thinking about travelling domestically. Only a small proportion (6%) indicated that they did not want to travel anywhere. 22% of New Zealand travellers mentioned Otago (or a specific destination within the Otago region) as being the place they would most like to go.

Those who want to visit the Otago region are more likely to stay in a hotel or private home/holiday home that's rented, compared to all New Zealand destinations. Scenic sightseeing, restaurants and cafes, walking and hiking and family activities are top of mind for those wanting to visit the Otago region.



### **NEXT TRIP**



	Oct - Dec 2020 %	Oct - Dec 2020 (n=)
Northland	7	45
Auckland	8	51
Waikato	8	51
Bay of Plenty	6	36
Gisborne	1	5
Hawke's Bay	3	18
Taranaki	3	19
Manawatū/Whanganui	2	14
Wellington & Wairarapa	9	55
Marlborough	1	7
Nelson	4	22
Tasman	1	5
West Coast	2	12
Canterbury	9	54
Otago	22	138
Southland	5	32
North Island (generally)	1	6
South Island (generally)	6	38
Other	3	16
I don't want to go anywhere	6	37
Base: Total Sample		n=623



### Of the 22% wanting to visit the Otago region, the main destinations mentioned were...

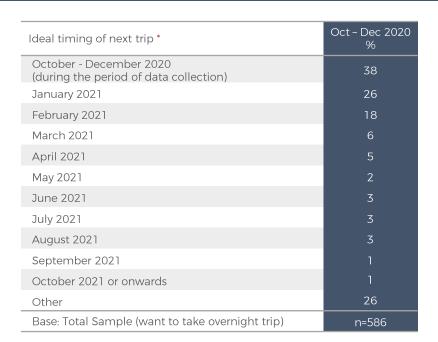
- Otago (generally) (1%)
- Queenstown (72%)

- Central Otago (3%)

- Lake Hawea \*

## **NEXT TRIP CONT.**

When would you ideally take this trip? Who would you like to travel with on this trip?





Travel party	Oct - Dec 2020 %
No one - I would travel on my own	15
My partner/husband/wife	64
My child or children	31
Other members of the family	11
A friend or friends	12
Work/business colleagues	1
Other people	1
Base: Total Sample (want to take overnight trip)	n=586

# Of those wanting to visit the Otago region, they are most likely to travel...

- With their partner/husband/wife (72%)
- With their child or children (28%)
- With a friend or friends (17%)
- With other members of the family (12%)
- Alone (8%)

### **NEXT TRIP CONT.**

### Where would you like to stay on this trip? How would you get there?



Of those wanting to visit the Otago region, the most common accommodation preferences are...

- Hotel (36%)
- Private home/holiday home rented (25%)
- Private home/holiday home no nightly payment (14%)
- Motel (11%)
- Camping ground/holiday park (4%)
- Serviced apartment (4%)



Transport used to get to destination	Oct - Dec 2020 %
Private vehicle	55
Scheduled domestic flight	43
Ferry	9
Rental vehicle	8
Scheduled bus/coach service between cities/towns	6
Private campervan/motorhome	5
Rental campervan/motorhome	5
Train	4
Other	1
Base: Total Sample (want to take overnight trip)	n=586

Of those wanting to visit the Otago region, the most common transport choices are likely to be...

- Scheduled domestic flight (74%)
- Private vehicle (29%)
- Rental vehicle (9%)
- Rental campervan/motorhome (6%)
- Ferry (4%)
- Scheduled bus/coach service between cities/towns (4%)

### **NEXT TRIP CONT.**

What activities or experiences would you like to do on this trip? What are your main reason/s for wanting to take this trip?

Activities or experiences – Top 15	Oct - Dec 2020 %
Scenic sightseeing	18
Family activities	15
Walking and hiking	14
Visiting beaches	13
Restaurants and cafes	13
Shopping	9
Swimming and pools (including hot pools)	8
Relaxing	7
Exploring new areas (e.g. road trip)	7
Fishing/boating	6
Arts and culture	5
Nature and wildlife	4
Events, concerts and festivals	4
Water-based activities (e.g. kayaking, sailing, surfing)	3
Nightlife	3
Base: Total Sample (want to take overnight trip)	n=586

Of those wanting to visit the Otago region, the most common activity/experience preferences are...

- Scenic sightseeing (25%)
- Restaurants and cafes (18%)
- Walking and hiking (17%)
- Family activities (12%)
- Skiing/snowboarding (12%)



Main Reasons for Trip	Oct - Dec 2020 %
To spend time with my family, friends or partner	11
To visit a place with great scenery	10
To visit a place I have never visited previously	9
To visit friends or family living in the region	9
To visit a place I live close to, or am familiar with	6
To rest and relax	5
To explore and discover a new place and/or new experiences	4
To visit a must-see ('bucket list') destination that people talk about	4
To visit a place with lots of things to do	4
To escape to a place with warmer weather	3
To get immersed with nature and wildlife	3
To escape and disconnect from the routine pressures of everyday life	2
To attend an event	2
To visit a place with great beaches	2
To indulge in comfort and be pampered	1
Base: Total Sample (want to take overnight trip)	n=586

Of those wanting to visit the Otago region, the most common reasons for wanting to make the trip are...

- To visit a place with great scenery (18%)
- To visit a must-see ('bucket list' destination that people talk about (8%)
- To visit a place I have never visited previously (7%)
- To spend time with my family, friends or partner (6%)
- To visit a place with lots of things to do (6%)

