VISITOR INSIGHTS PROGRAMME

MARKET PERCEPTIONS: DUNEDIN

YEAR ENDED JUNE 2021



VISITOR INSIGHTS PROGRAMME: MARKET PERCEPTIONS

BACKGROUND & RESEARCH APPROACH

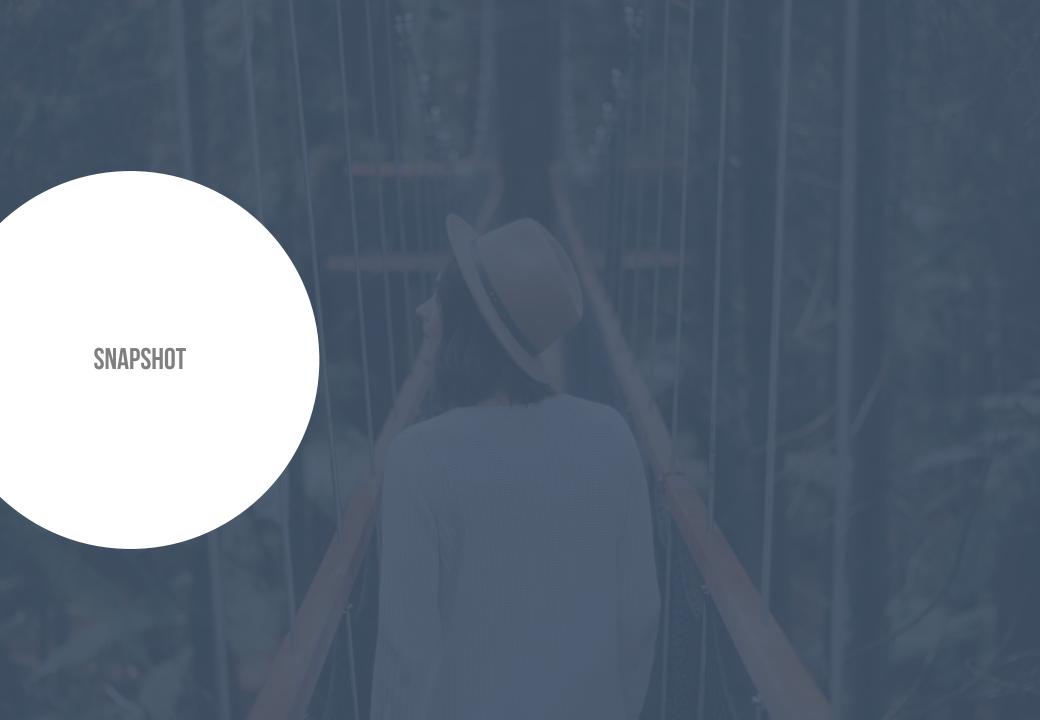
Background

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. This report is based on data collected between July 2020 – June 2021. The 'regional benchmark' referenced in this report is the average across five regions – Auckland, Rotorua, Wellington, Christchurch and Queenstown.





SNAPSHOT (YE JUNE 2021)

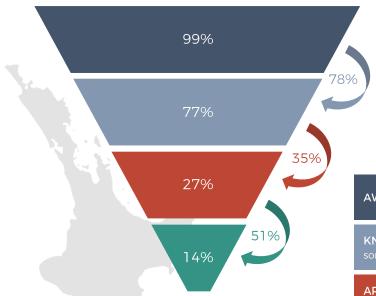
NEW ZEALAND TRAVELLERS

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





10% 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



39% Restaurants, Cafes & Bars



37% Gardens, Parks & Reserves



34% Arts & Culture



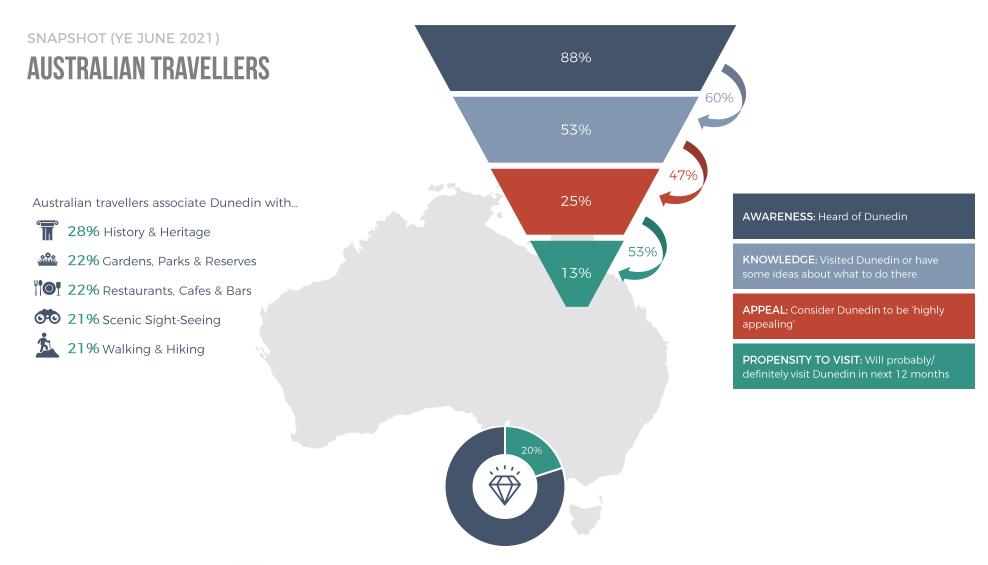
28% Family Activities



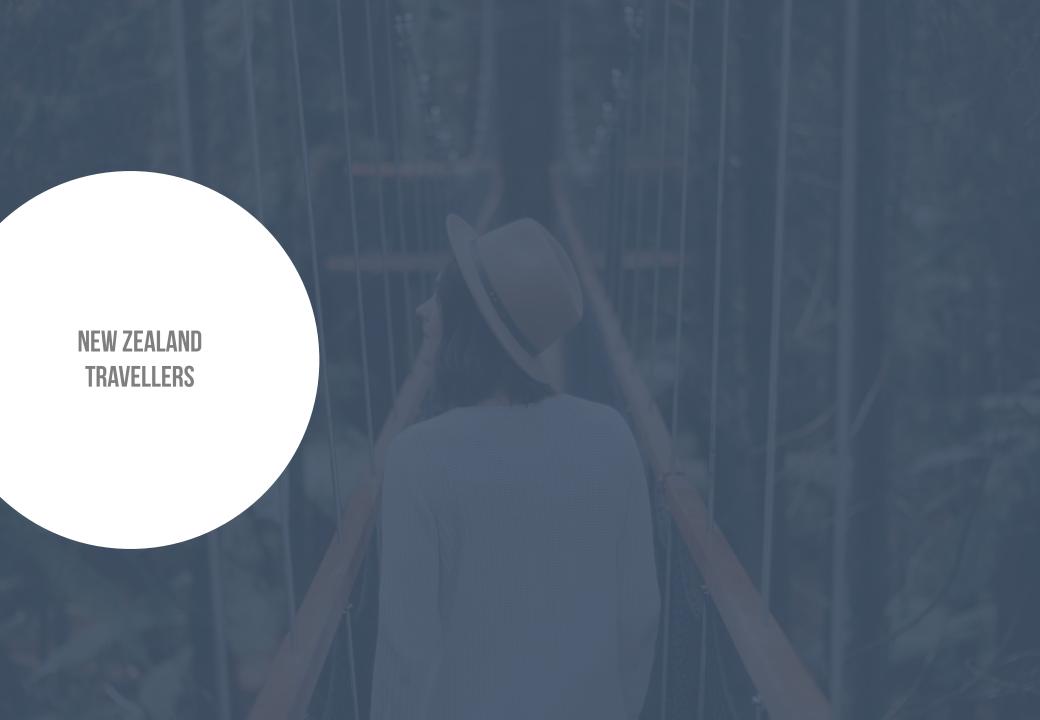
27% Events, Concerts & Festivals



30% of New Zealand travellers agree that Dunedin is a vibrant city/town full of hidden gems



20% of Australian travellers agree that Dunedin is a vibrant city/town full of hidden gems



UPDATE: YE JUNE 2021

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

The results for the full year reflect much of the findings for the 6-month report. There was a slight decline in the percentage of New Zealanders who have travelled domestically visiting Dunedin (10% down from 12%).

Canterbury, Auckland and Southland remain 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 32% compared to 41%, this increases to 54% 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.



10% of New Zealanders (excluding Dunedin residents) who travelled domestically within the past 12 months visited Dunedin

> 8% 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 (excl. residents)	Visited Dunedin (Past 12 Months)
Region of Residence	%	%
Northland	4	2 🔻
Auckland	34	24 ▼
Waikato	10	5 🔻
Bay of Plenty	7	6
Gisborne	1	0 🔻
Hawke's Bay	4	1 🔻
Taranaki	2	1
Manawatu-Whanganui	6	2 🔻
Wellington (& Wairarapa)	11	8
Tasman	1	2
Nelson	2	1
Marlborough	1	1
West Coast	1	0
Canterbury	13	25 🛦
Otago (excl. Dunedin residents)	2	11 🔺
Southland	2	13 🛦
Base: YE June 2021	n=2411	n=236

	Total Sample (excl. residents)	Visited Dunedin (Past 12 Months)
Age	%	%
18-19 years	3	4
20-29 years	17	14
30-39 years	17	17
40-49 years	19	18
50-59 years	17	15
60-69 years	14	16
70+ years	14	16
Household Composition	%	%
My husband, wife or partner	65	73 🔺
My mother and/or father	7	5
My children aged under 5	13	9 🔻
My children aged 5 to 14	19	17
My children aged 15 or older	15	19
Other family/relatives	9	8
Other person(s)	7	10
None of the above - I live alone	14	10
Base: YE June 2021	n=2411	n=236

FAMILARITY WITH DUNEDIN

How familiar are you with Dunedin as a destination to visit for a short break or holiday?



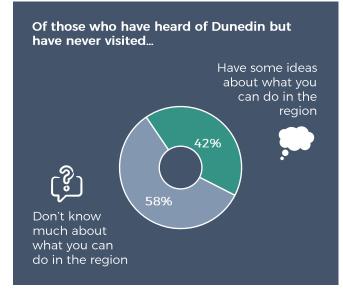


61% of New Zealand travellers have visited Dunedin

38% 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 Jun 2021 Excluding Residents (n=2,411)

EXPERIENCES ASSOCIATED WITH DUNEDIN

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

Total Sample	Jun 2021 %
History & Heritage	50%
Restaurants, Cafés & Bars	39%
Gardens, Parks & Reserves	37%
Arts & Culture	34%
Family Activities	28%
Events, Concerts & Festivals	27%
Nature, Wildlife & Eco-tourism	27%
Walking & Hiking	26%
Shopping	24%
Scenic Sight-Seeing	22%
Cycling/Mountain Biking	16%
Golf, Fishing & Hunting	13%
Casinos/Gambling	10%
Water-based Activities	10%
Spa & Wellness	8%
Wineries	7%
Māori/Pacific Culture	6%
Adrenaline Activities	5%
Skiing/Snowboarding	5%
Volcanic & Geothermal	3%
None of the above/Don't know	21%
Base: Total Sample (Heard of Dunedin)	n=2472

Recent Visitors	Jun 2021 %
History & Heritage	70%
Restaurants, Cafés & Bars	66%
Gardens, Parks & Reserves	63%
Arts & Culture	54%
Family Activities	52%
Events, Concerts & Festivals	51%
Shopping	47%
Walking & Hiking	44%
Nature, Wildlife & Eco-tourism	41%
Scenic Sight-Seeing	31%
Casinos/Gambling	23%
Cycling/Mountain Biking	21%
Golf, Fishing & Hunting	19%
Water-based Activities	15%
Spa & Wellness	10%
Māori/Pacific Culture	8%
Wineries	7%
Adrenaline Activities	6%
Skiing/Snowboarding	3%
Volcanic & Geothermal	3%
None of the above/Don't know	7%
Base: Visited Dunedin in Past 12 Months	n=236

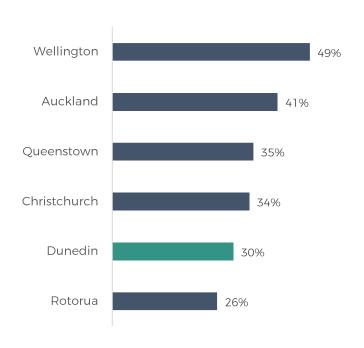


PERCEPTIONS OF DUNEDIN

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



IS A VIBRANT CITY/TOWN FULL OF HIDDEN GEMS





Base: Jun 2021 (n=2,495)

DUNEDIN APPEAL

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

Total Samp	ple	YE Jun 2021 %
<u>•</u>	Highly Appealing	32
	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=2388

Recent Vis	itors	YE Jun 2021 %
<u> </u>	Highly Appealing	54
	Somewhat Appealing	37
	Not very Appealing	6
	Not at all Appealing	
?	Don't know/NA	
Base: Visit	ed Dunedin in Past 12 Months	n=273

Regional Benchmark		
41		
38		
14		
6		
2		

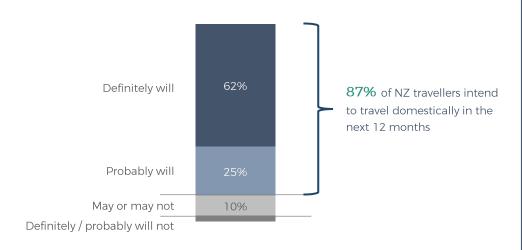


PROPENSITY TO VISIT DUNEDIN

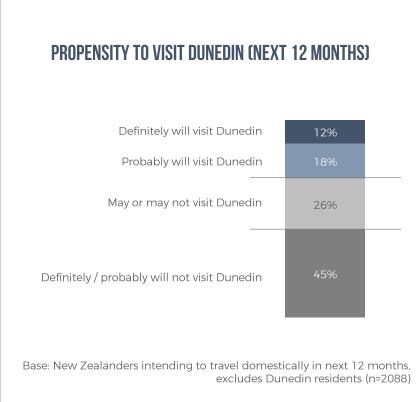


How likely are you to travel within New Zealand in the next 12 months? Please include any trips (i.e. holiday, business, or any other reason). How likely are you to visit Dunedin, for any reason, within the next 12 months?

PROPENSITY TO TRAVEL DOMESTICALLY (NEXT 12 MONTHS)



Base: Total Sample YE June 2021 (n=2,495)



CONVERTING AWARENESS TO VISITATION

AWARENESS

Heard of Dunedin

KNOWLEDGE

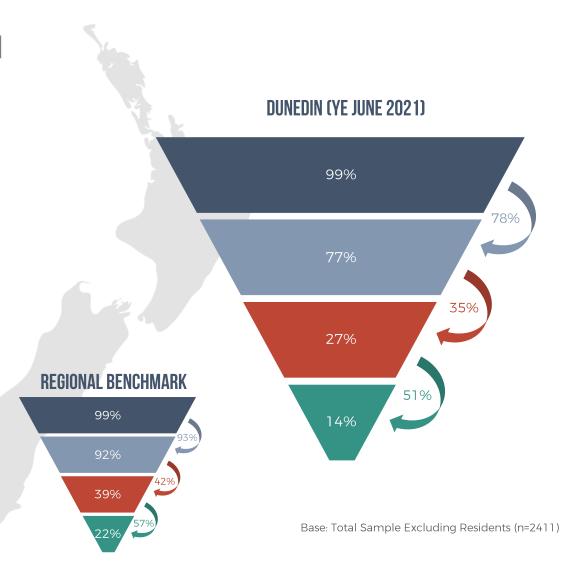
Visited Dunedin or have some ideas about what to do there

APPEAL

Consider Dunedin to be 'highly appealing'

PROPENSITY TO VISIT

Will probably/definitely visit Dunedin in next 12 months





UPDATE: YE JUNE 2021

Most of the survey period includes border closures with Australia. The final quarter was the only period where non quarantine travel was permitted with Australia. However, the survey asks respondents about their previous 12-month travel experiences meaning some responses will relate to travel as far back as July 2019. As a result, the proportion of Australians reporting that they have visited is lower than it otherwise would be. The recently visited sample size is small and results need to be used with caution.

Overall, 88% of Australian travellers have either visited or heard of Dunedin. However, 61% who have heard of Dunedin do not know much about the destination. This indicates an opportunity to increase destination profile in the market.

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 fifth out of six destinations.

Dunedin has a very high appeal to Australian travellers with 36% stating Dunedin is highly appealing as a short break destination and 39% stating it is somewhat appealing.

The conversion from knowledge to propensity to visit, is stronger from a lower base but may indicate the opportunity lies in the awareness positioning of Dunedin in the Australian market.



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?

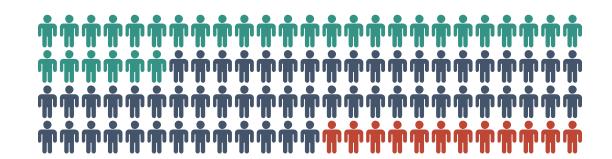
	Total Sample	Visited Dunedin (Past 12 Months)
Region of Residence	%	%
Australian Capital Territory	2	0
New South Wales	31	34
Northern Territory	1	0
Queensland	20	17
South Australia	8	4
Tasmania	3	9
Victoria	24	30
Western Australia	10	6
Base: YE June 2021	n=2436	n=47

	Total Sample	Visited Dunedin (Past 12 Months)
Age	%	%
18-19 years	3	2
20-29 years	18	6 ▼
30-39 years	18	19
40-49 years	18	13
50-59 years	16	24
60-69 years	13	10
70+ years	13	25
Household Composition	%	%
My husband, wife or partner	61	81 🛦
My mother and/or father	8	4
My children aged under 5	10	13
My children aged 5 to 14	21	21
My children aged 15 or older	15	23
Other family/relatives	8	11
Other person(s)	5	2
None of the above - I live alone	14	6 ▼
Base: YE June 2021	n=2443	n=47

FAMILARITY WITH DUNEDIN



How familiar are you with Dunedin as a destination to visit for a short break or holiday?

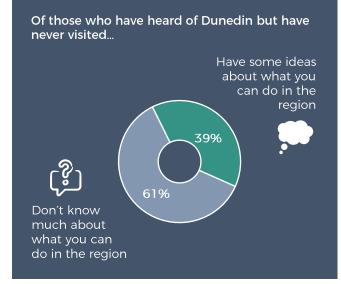


31% of Australian travellers have visited Dunedin

57% of Australian travellers have heard of Dunedin but have never visited



12% of Australian travellers haven't heard of Dunedin



Base: Total Sample YE Jun 2021 (n=2436)

EXPERIENCES ASSOCIATED WITH DUNEDIN

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

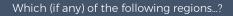


Total Sample	YE Jun 21 %
History & Heritage	28
Gardens, Parks & Reserves	22
Restaurants, Cafés & Bars	22
Walking & Hiking	21
Scenic Sight-Seeing	21
Arts & Culture	19
Nature, Wildlife & Eco-tourism	17
Shopping	17
Family Activities	16
Māori/Pacific Culture	12
Events, Concerts & Festivals	11
Cycling/Mountain Biking	11
Golf, Fishing & Hunting	11
Wineries	11
Water-based Activities	11
Adrenaline Activities	9
Spa & Wellness	9
Skiing/Snowboarding	9
Volcanic & Geothermal	7
Casinos/Gambling	7
None of the above/Don't know	31
Base: Total Sample (Heard of Dunedin)	n=2135

Recent Visitors	YE Jun 2021 %
History & Heritage	70
Gardens, Parks & Reserves	55
Walking & Hiking	49
Arts & Culture	47
Restaurants, Cafés & Bars	45
Nature, Wildlife & Eco-tourism	43
Family Activities	38
Scenic Sight-Seeing	36
Events, Concerts & Festivals	34
Golf, Fishing & Hunting	32
Shopping	30
Wineries	23
Cycling/Mountain Biking	21
Volcanic & Geothermal	21
Water-based Activities	21
Adrenaline Activities	17
Spa & Wellness	17
Casinos/Gambling	15
Māori/Pacific Culture	15
Skiing/Snowboarding	9
None of the above/Don't know	4
Base: Visited Dunedin in Past 12 Months	n=47*

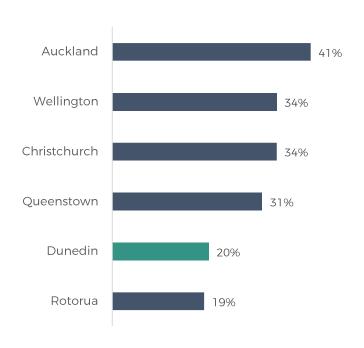
*Caution: Small Base Size

PERCEPTIONS OF DUNEDIN





IS A VIBRANT CITY/TOWN FULL OF HIDDEN GEMS





Base: YE Jun 2021 (n=2425)

DUNEDIN APPEAL

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



Total Sam	ple	YE Jun 2021 %
	Highly Appealing	36
	Somewhat Appealing	39
	Not very Appealing	10
	Not at all Appealing	4
?	Don't know/NA	10
Base: Hea	ard of Dunedin	n=2135

Regional Benchmark			
44			
38			
8			
4			
7			

Recent Vis	itors	YE Jun 2021 %
<u> </u>	Highly Appealing	77
	Somewhat Appealing	21
	Not very Appealing	0
	Not at all Appealing	0
?	Don't know/NA	
Base: Visit	ed Dunedin in Past 12 Months	n=47*

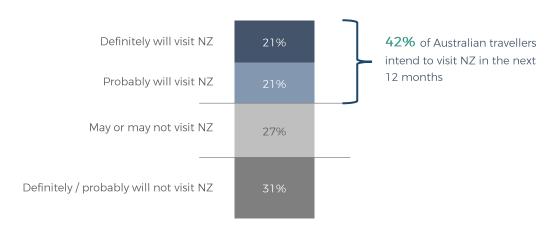
*Caution: Small Base Size

PROPENSITY TO VISIT DUNEDIN



How likely are you to travel to New Zealand in the next 12 months? Please include any trips (i.e. holiday, business, or any other reason). How likely are you to visit Dunedin, for any reason, within the next 12 months?

PROPENSITY TO TRAVEL TO NZ (NEXT 12 MONTHS)



Base: Total Sample YE June 2021 (n=2,436)



CONVERTING AWARENESS TO VISITATION

AWARENESS

Heard of Dunedin

KNOWLEDGE

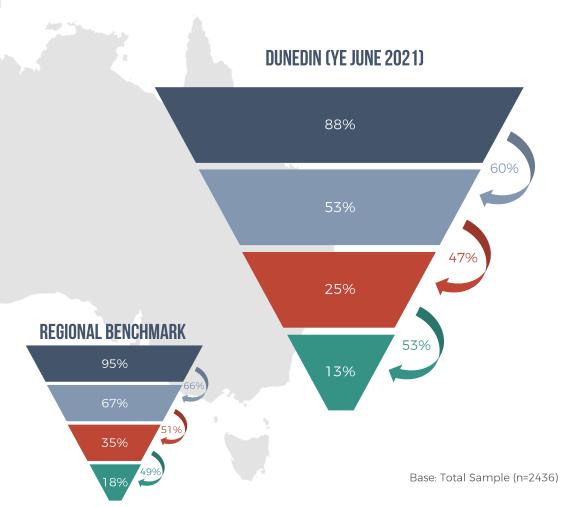
Visited Dunedin or have some ideas about what to do there

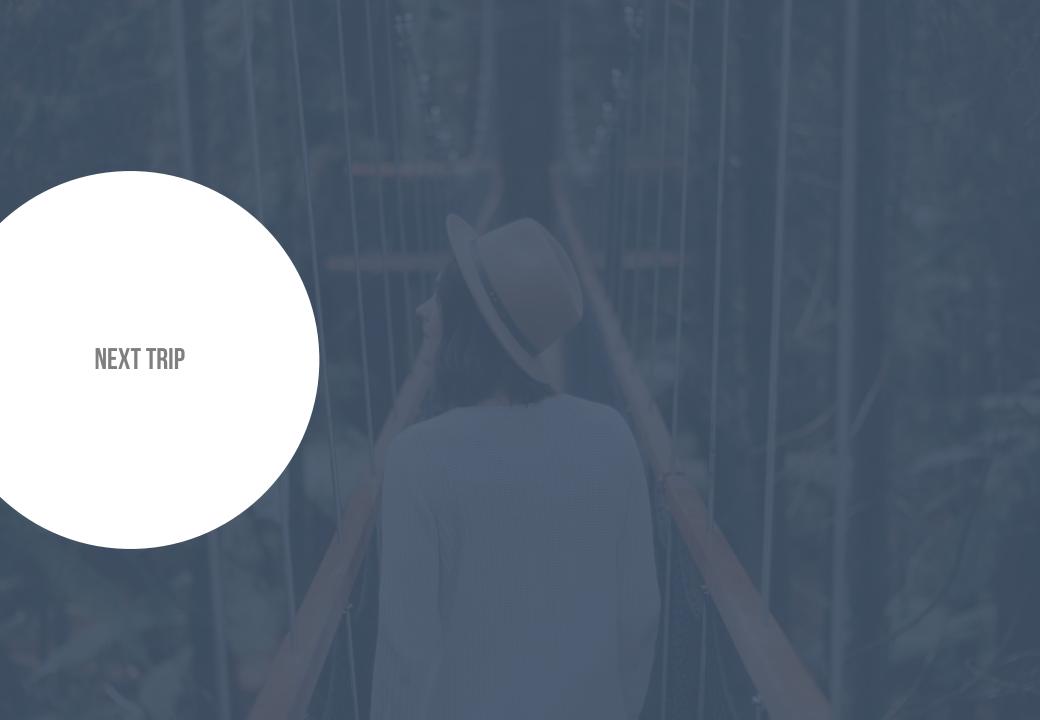
APPEAL

Consider Dunedin to be 'highly appealing'

PROPENSITY TO VISIT

Will probably/definitely visit Dunedin in next 12 months





NEXT TRIP

In April 2020 a 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 April to Jun 2021 period. The additional analysis in green column provides details for the trips that New Zealanders are wanting to make to Dunedin.

Due to the small sample size for Dunedin for the collection period April – Jun, the reporting period has been extended to January - June. This allows for indicators of the characteristics of people looking at Dunedin for their next trip.

The report shows the full sample data for January - June and the April - June collection periods for comparison.

Most New Zealanders are open to thinking about travelling domestically, with only 9% indicated that they did not want to travel anywhere in the most recent quarter (up from 6% in the last quarterly report).

Two percent of New Zealand travellers mentioned Dunedin as the place they would most like to go.



NEXT TRIP



We're interested to hear about the next overnight trip that you would like to make within New Zealand. Where in New Zealand would you most like to go?

	April – Jun 2021 %	Jan – Jun 2021 %	Jan – Jun 2021 (n=)
Northland	6	6	71
Auckland	6	7	92
Waikato	8	10	121
Bay of Plenty (incl Rotorua)	8	7	90
Gisborne	1	1	13
Hawke's Bay	4	3	43
Taranaki	2	2	19
Manawatū/Whanganui	1	1	11
Wellington & Wairarapa	11	9	115
Marlborough	1	1	18
Nelson	3	3	43
Tasman	1	1	8
West Coast	2	2	25
Canterbury	8	9	107
Otago	23	23	286
Southland	4	5	58
North Island (generally)	2	1	13
South Island (generally)	5	5	62
Other	3	2	29
I don't want to go anywhere	9	8	101
Base: Total Sample	n=620		n=1247



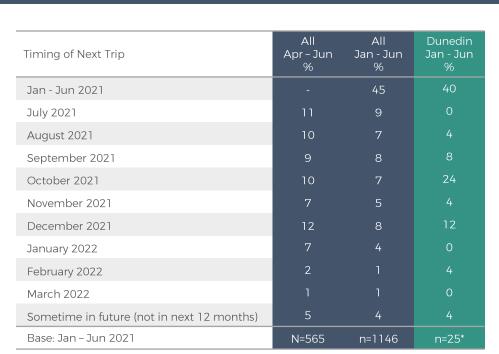
92% of New Zealanders want to take an overnight trip within New Zealand

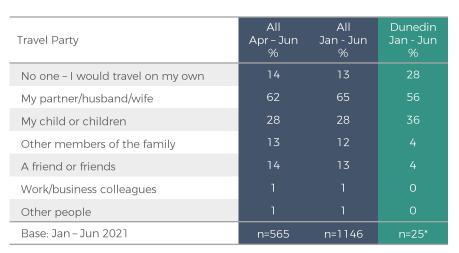
Of the 23% (n=286) wanting to visit the Otago region, Dunedin was mentioned by 9% (n=25).

That equates to 2% of the total sample

NEXT TRIP CONT.

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





^{*} Caution: Due to small sample size data should be treated as indicative only 28

NEXT TRIP CONT.

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



Type of accommodation	All Apr – Jun %	All Jan - Jun %	Dunedin Jan - Jun %
Hotel	27	25	28
Private home/holiday home - no payment	20	21	44
Motel	16	16	24
Private home/holiday home - rented	14	15	4
Camping ground/holiday park	7	7	0
Serviced apartment	5	4	0
Bed and Breakfast, Homestay or Farmstay	3	3	0
Luxury lodge	2	2	0
Backpackers/hostel	2	2	0
Freedom camping	2	2	0
Other	3	3	0
Base: Base: Jan – Jun 2021	n=565	n=1146	n=25*

Transport used to get to destination	All Apr – Jun %	All Jan - Jun %	Dunedin Jan - Jun %
Private vehicle	50	52	48
Scheduled domestic flight	46	45	68
Rental vehicle	8	8	4
Private campervan/motorhome	8	7	0
Ferry	5	6	8
Rental campervan/motorhome	4	4	0
Train	4	4	4
Scheduled bus/coach service	3	3	
Other	2	1	0
Base: Base: Jan – Jun 2021	n=565	n=1146	n=25*

^{*} Caution: Due to small sample size data should be treated as indicative only 29

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	All Apr – Jun %	All Jan - Jun %	Dunedin Jan - Jun %
Restaurants and Cafes	56	56	60
Relaxing	54	53	44
Scenic Sightseeing	42	43	44
Walking and Hiking	36	38	32
Shopping	38	37	40
Exploring new areas	34	34	36
Visiting Beaches	32	34	28
Family Activities	34	31	44
Nature and Wildlife	30	31	16
Swimming and Pools	26	28	16
History and Heritage Sites	26	25	24
Arts and Culture	21	21	24
Photography	18	20	8
Wineries	16	18	8
Spa & Wellness	16	16	12
Base: Total Sample Jan - June 2021	n=565	n=1146	n=25*



Events, Concerts and Festivals (20%) and nightlife (8%) are in the top fifteen activities / experiences for Dunedin but not for the country as a whole.

NEXT TRIP CONT.

What are your main reason/s for wanting to take this trip?



Main Reasons for Trip	All Apr – Jun %	All Jan - Jun %	Dunedin Jan - Jun %
To rest and relax	51	53	36
To spend time with my family, friends or partner	46	47	40
To escape and disconnect from the routine and pressures of everyday life	30	32	20
To explore and discover a new place and/or new experiences	29	30	12
To visit friends or family living in the region	22	23	44
To get immersed with nature and wildlife	16	18	0
To visit a must-see destination that people talk about	15	15	12
To experience adventure, challenge, or excitement	15	14	4
To indulge in comfort and be pampered	14	14	4
To meet new people and share experiences	10	9	8
To escape to a place with warmer weather	8	8	20
To engage in a sport that I am passionate about	7	7	0
To attend an event	6	6	16
Base: Total Sample Jan – June 2021	n=565	n=1146	n=25*

^{*} Caution: Due to small sample size data should be treated as indicative only 31

