



VISITOR INSIGHTS PROGRAMME

# MARKET PERCEPTIONS: ROTORUA

YEAR ENDING JUNE 2025

# BACKGROUND & RESEARCH APPROACH

## MARKET PERCEPTIONS: ROTORUA

### 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. Market Perceptions 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 survey is conducted online, including on mobile devices, with a sample of at least 7,200 New Zealand and Australian travellers each year. This includes 300 New Zealanders and 300 Australians per month, recruited via Dynata's consumer panel. Participants must be 18+ years old and have travelled overnight in the past 12 months. Quotas based on census data (region, gender, and age) ensure a representative sample for accurate trend monitoring. This report presents data between July 2024 - June 2025, with some longitudinal references back to 2017.

The 'NZ Regional Benchmark' referenced in this report is the average across 16 destinations – Coromandel, Hawke's Bay, Taupo, Waitaki, Bay of Plenty, Waikato, Ruapehu, Gisborne, Dunedin, Auckland, Marlborough, Northland, Wellington, Central Otago, Queenstown, and Rotorua.

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A woman wearing a light-colored hat and a textured sweater is seen from behind, standing on a wooden suspension bridge. The bridge has thick wooden railings and numerous vertical support cables. The background is a dense, out-of-focus forest with tall trees. The entire image is overlaid with a semi-transparent dark blue filter. On the left side, there is a large white circle containing the word "INSIGHTS".

**INSIGHTS**

# ROTORUA INSIGHTS: YEAR ENDING JUNE 2025

## DOMESTIC TRAVEL MARKET



### Familiarity:

Most New Zealand travellers (84%) have visited Rotorua at least once, and a further 9% have not visited but are aware of what the region offers.

### Market Penetration:

In the past 12 months, 71% of New Zealanders have travelled domestically, with 17% visiting Rotorua. Market penetration is consistent with recent years but remains below pre-COVID levels (26-27% from 2017 to 2020).

### Visitor Profile:

Rotorua attracts a wide range of domestic travellers but over-indexes among 30-39-year-olds and families with primary school-aged children compared to the broader domestic market. Auckland is a key source market, along with the wider Waikato and Bay of Plenty regions.

### Associations:

Rotorua's geothermal activity and distinctive sulphur smell remain top-of-mind for domestic travellers. The region continues to dominate associations with volcanic landscapes and Māori culture, both strong, unique differentiators. Rotorua is rated just ahead of Queenstown as a top destination for mountain biking. It also ranks higher than Tauranga and Northland as a family holiday destination, though slightly below Taupō and Queenstown.

### Net Promoter Score (NPS):

Rotorua's NPS among domestic visitors is -15, slightly below the regional benchmark of -8.

### Intention to Visit:

While market penetration has declined compared to pre-COVID levels, intention to visit has remained stable over the past seven years, suggesting that interest in visiting Rotorua remains strong, but fewer people are following through with actual travel.

### Barriers to Visitation:

The main barriers to visiting Rotorua are a lack of a compelling reason to visit and having already been there. The latter is notably higher than the regional benchmark, suggesting many potential visitors feel they have "done" the destination and see little reason to return. Despite this, two thirds of recent visitors intend to return within the next 12 months. This figure has remained consistently high over the past seven years.



# ROTORUA INSIGHTS: YEAR ENDING JUNE 2025

## AUSTRALIAN TRAVEL MARKET



### Familiarity:

More than half of Australian travellers (57%) are familiar with Rotorua, either through having visited or a general awareness of things to do there. This level of familiarity is significantly higher than the New Zealand regional benchmark of 41%.

### Market Penetration:

One in four Australians who travelled to New Zealand in the past 12 months visited Rotorua (24%). Of those who visited Rotorua, 63% stayed overnight, while the remaining 37% were day trippers.

### Visitor Profile:

Similar to the domestic market, Rotorua attracts a higher proportion of Australian visitors aged 20 to 49, particularly families with primary school-aged children, compared to the broader Australian visitor market. In contrast, visitors aged 60 and over are underrepresented.

### Associations:

Perceptions of Rotorua among Australian travellers are broadly aligned with those of the domestic market. The region is well established and recognised for its geothermal and volcanic activity, as well as its Māori cultural experiences. However, it is not as strongly associated with mountain biking as Queenstown.

### Net Promoter Score (NPS):

Australians who have visited Rotorua tend to be strong advocates for the region. Its Net Promoter Score (NPS) among Australian visitors is +28, slightly above the New Zealand regional benchmark of +22.

### Intention to Visit:

Intention to visit has remained steady in recent years. Among Australians planning a trip to New Zealand in the next 12 months, 65% intend to visit Rotorua.

### Barriers to Visitation:

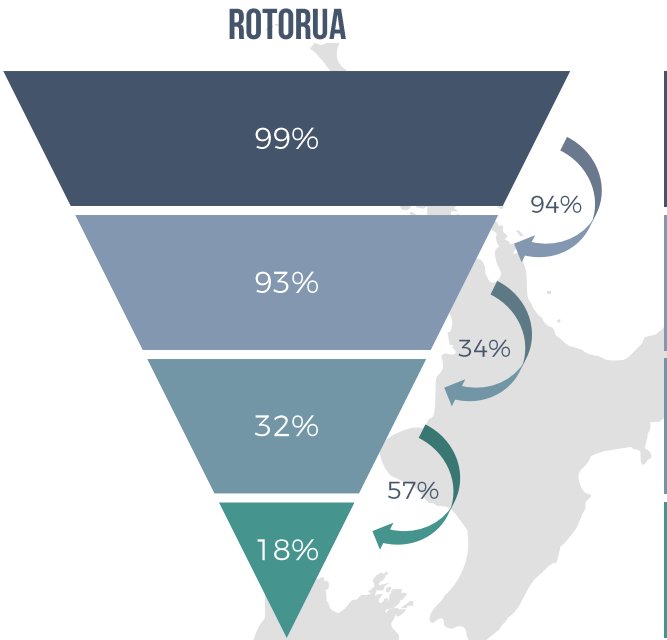
The main barrier for Australian visitors is having already been to Rotorua (49%, compared to the regional benchmark of 24%), suggesting that encouraging repeat visitation may be a challenge in this market.

A woman wearing a light-colored fedora and a textured sweater is seen from behind, standing on a wooden suspension bridge. The bridge has thick wooden handrails and numerous vertical suspension cables. The background is a dense, out-of-focus forest with tall trees. The entire image is overlaid with a semi-transparent dark blue filter. On the left side, there is a large white circle containing the word 'SNAPSHOT' in a bold, sans-serif font.

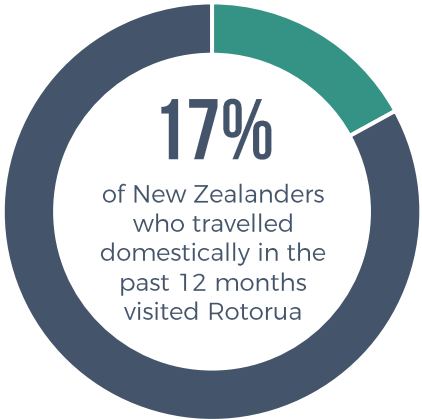
**SNAPSHOT**

# ROTORUA SNAPSHOT: YEAR ENDING JUNE 2025

## DOMESTIC TRAVEL MARKET



- AWARENESS**  
Have heard of Rotorua
- FAMILIARITY**  
Have either visited Rotorua or have some ideas about what there is to do there
- APPEAL**  
Rate Rotorua as a highly appealing destination
- PROPENSITY TO VISIT**  
Intend to visit Rotorua within next 12 months (probably / definitely will visit)



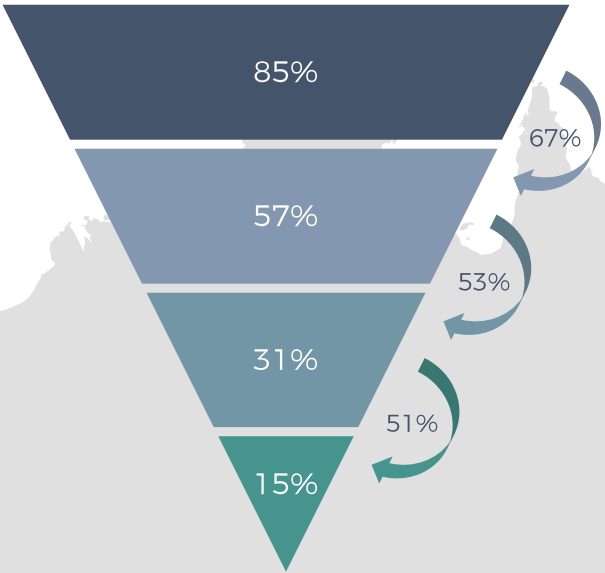


# ROTORUA SNAPSHOT: YEAR ENDING JUNE 2025

## AUSTRALIAN TRAVEL MARKET



### ROTORUA



#### AWARENESS

Have heard of Rotorua

#### FAMILIARITY

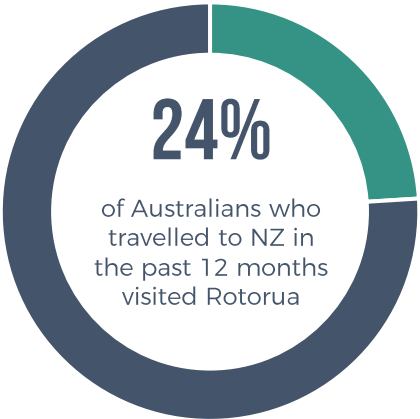
Have either visited Rotorua or have some ideas about what there is to do there

#### APPEAL

Rate Rotorua as a highly appealing destination

#### PROPENSITY TO VISIT

Intend to visit Rotorua within next 12 months (probably / definitely will visit)



#### Australian travellers associate Rotorua with...



Volcanic & Geothermal (48%)



Māori/Pacific Culture (41%)



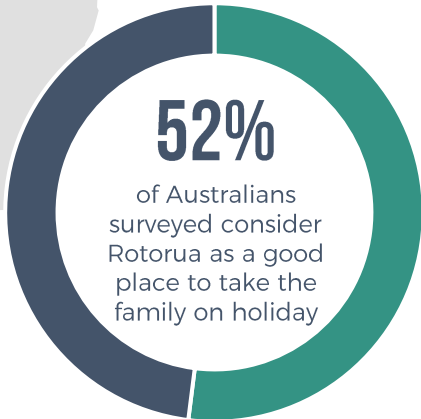
Walking & Hiking (37%)



Nature, Wildlife & Eco-tourism (37%)



History & Heritage (36%)



A woman wearing a light-colored hat and a textured sweater is walking away from the camera on a wooden suspension bridge. The bridge has thick wooden planks and numerous vertical support ropes. The background is a dense, out-of-focus forest with tall trees. The entire image has a blue color overlay.

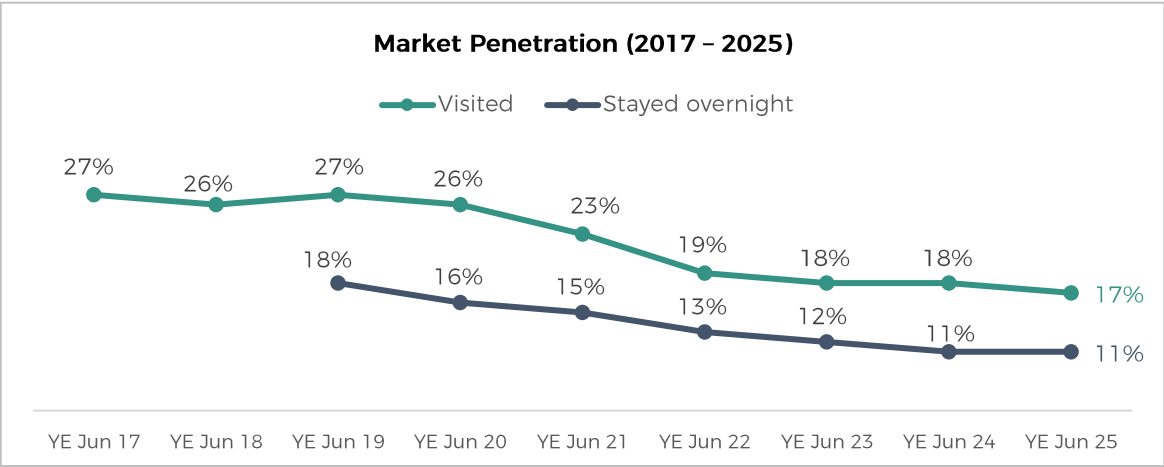
## **DOMESTIC TRAVEL MARKET**

# MARKET PENETRATION

In the past 12 months, where (if anywhere) have you travelled?



Base: Total Sample (YE Jun 25) - NZ Domestic Travellers (travelled within NZ in past 12 months), excl. Rotorua Residents (n=3,229)



# RECENT VISITOR PROFILE

In the past 12 months, where (if anywhere) have you travelled?



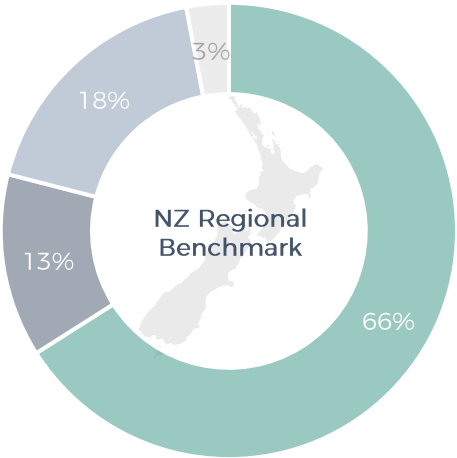
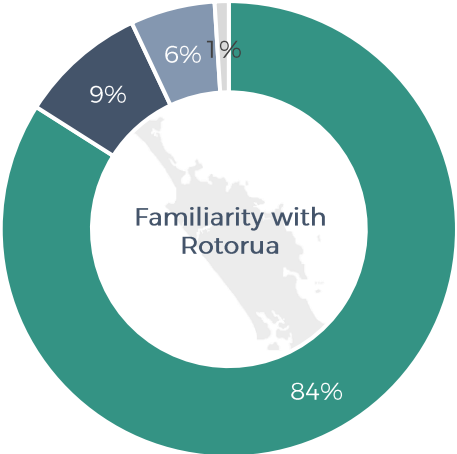
	Total Sample	Recent Visitors
Region of Residence		
Northland	4%	4%
Auckland	34%	37%
Waikato	10%	17% ▲
Bay of Plenty	5%	12% ▲
Tairāwhiti / Gisborne	0%	0%
Hawke's Bay	4%	6%
Taranaki	3%	3%
Manawatū-Whanganui	5%	5%
Wellington (& Wairarapa)	11%	10%
Tasman	1%	0%
Nelson	2%	0% ▼
Marlborough	1%	0%
West Coast	0%	0%
Canterbury	13%	4% ▼
Otago	5%	2% ▼
Southland	2%	1%
North Island (NET)	76%	93% ▲
South Island (NET)	24%	7% ▼

	Total Sample	Recent Visitors
Age		
18-19 years	4%	3%
20-29 years	18%	19%
30-39 years	17%	21% ▲
40-49 years	17%	18%
50-59 years	17%	18%
60-69 years	14%	11% ▼
70+ years	14%	11% ▼
Household Composition		
My husband, wife or partner	59%	66% ▲
My mother and/or father	6%	6%
My children aged under 5	11%	12%
My children aged 5 to 14	18%	25% ▲
My children aged 15 or older	14%	16%
Other family/relatives	9%	10%
Other person(s)	7%	6%
None of the above – I live alone	16%	10% ▼

▲/ ▼ Significantly higher or lower than total sample at 95% confidence

# FAMILIARITY

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



- Have visited (ever)
- Have never visited but have some ideas about what you can do there
- Have never visited and don't know much about what you can do there
- Have never heard of

**84%** of New Zealand travellers have visited Rotorua (ever)





## TOP-OF-MIND ASSOCIATIONS

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



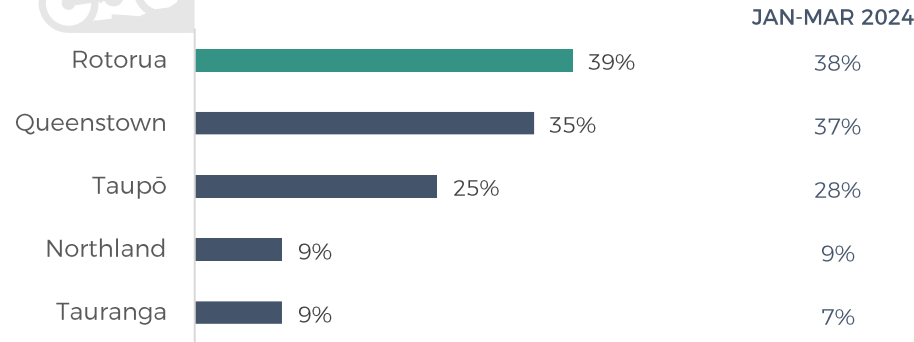
# POSITIONING

Which, if any, of the following destinations is...?



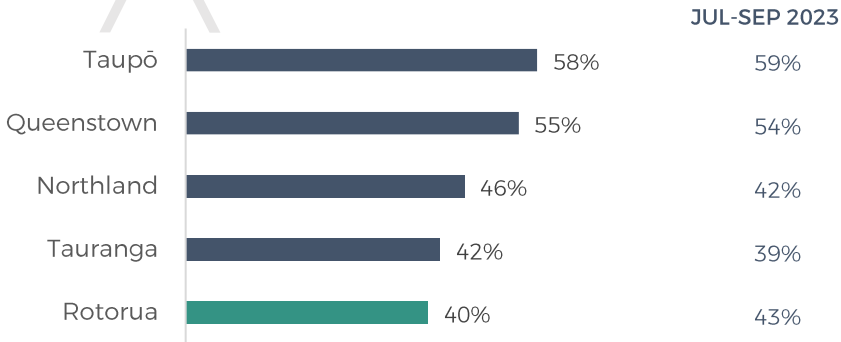
(JAN-MAR 2025)

## A TOP MOUNTAIN BIKING DESTINATION



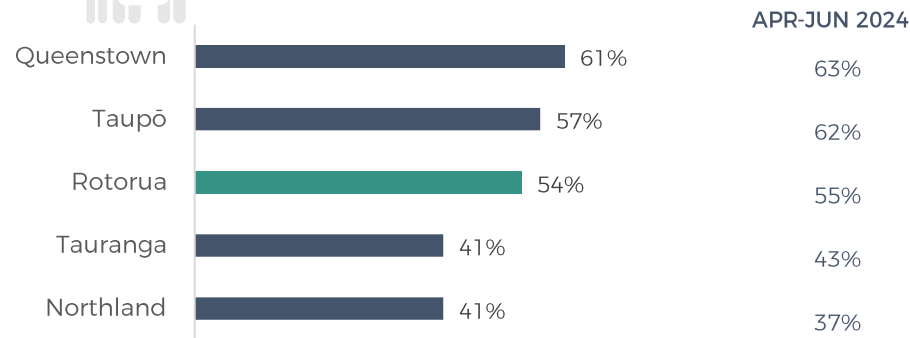
(JUL-SEP 2024)

## A PLACE YOU CAN RELAX AND UNWIND



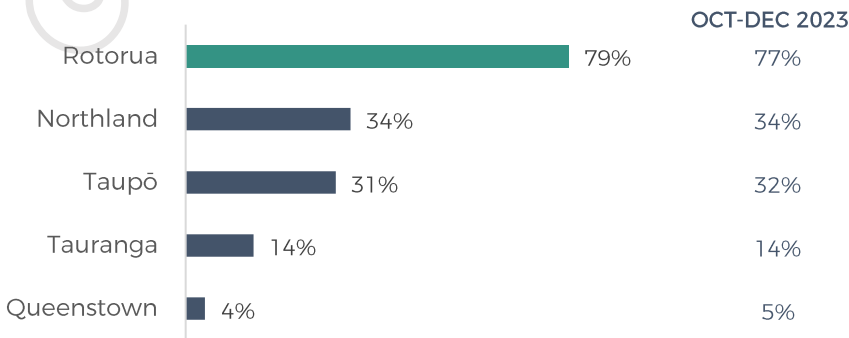
(APR-JUN 2025)

## A GOOD PLACE TO TAKE THE FAMILY ON HOLIDAY



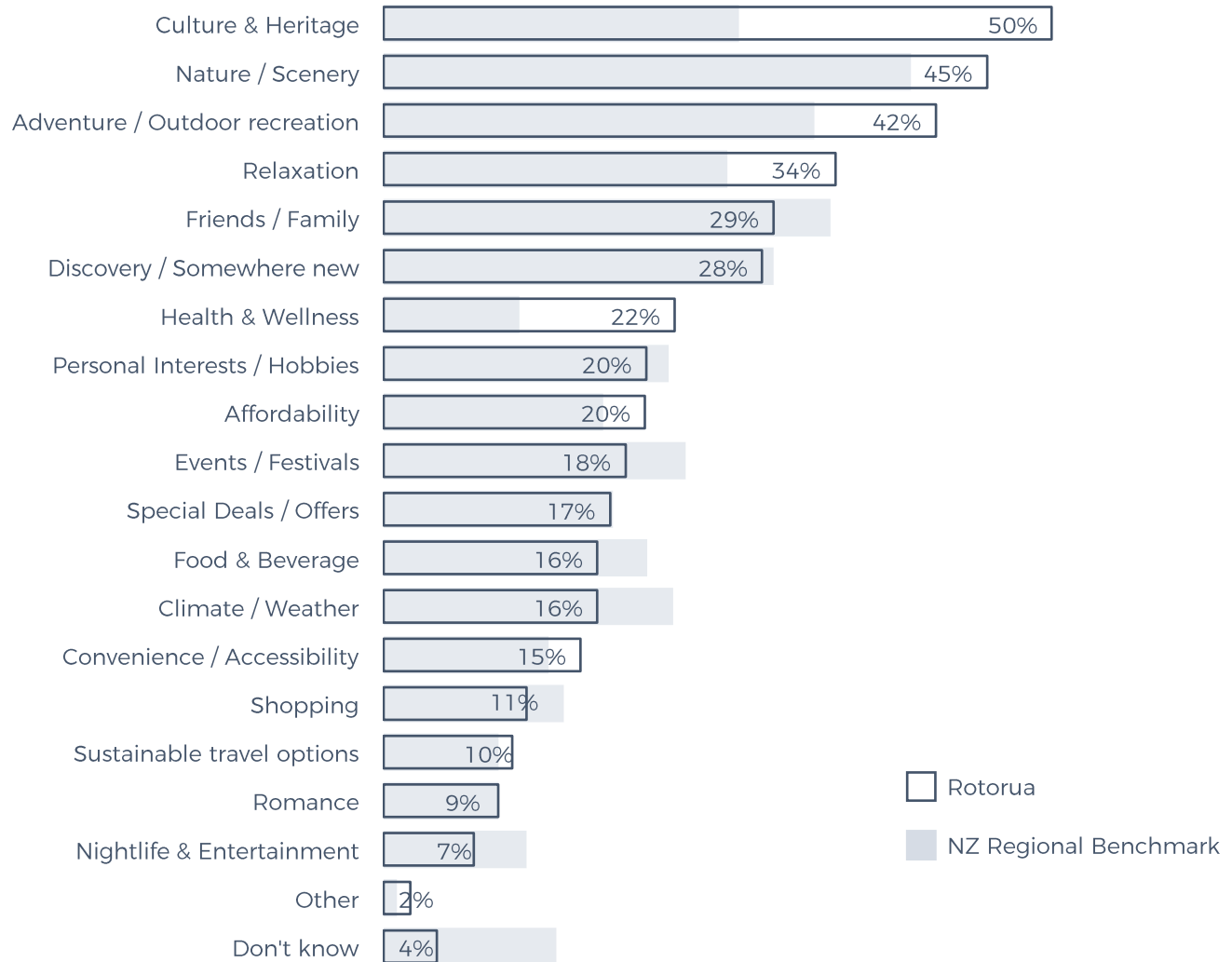
(OCT-DEC 2024)

## A PLACE TO EXPERIENCE AUTHENTIC MĀORI CULTURE



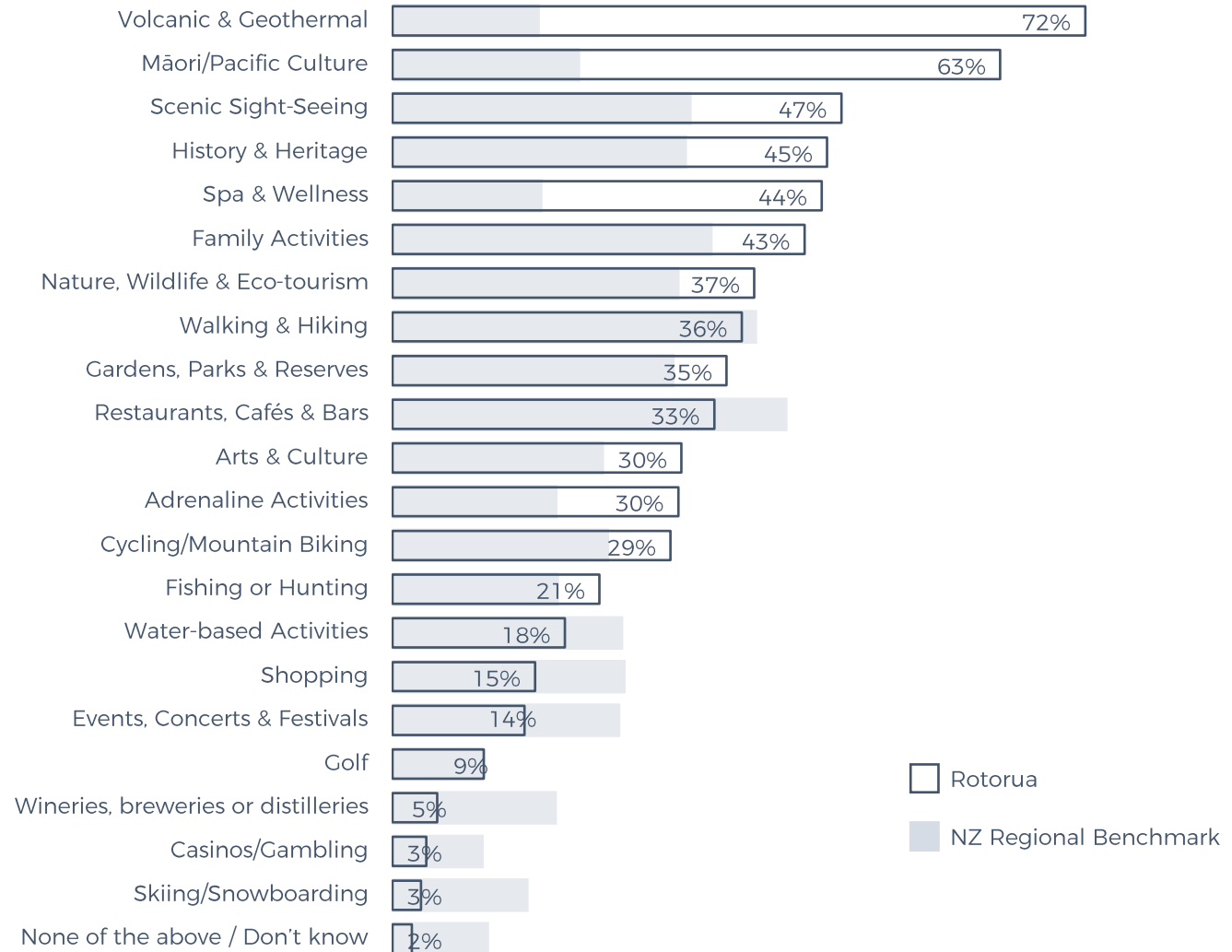
# DESTINATION DRIVERS

Why might someone choose to visit Rotorua instead of another New Zealand destination?



# ACTIVITIES / EXPERIENCES

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



# ACTIVITIES / EXPERIENCES

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

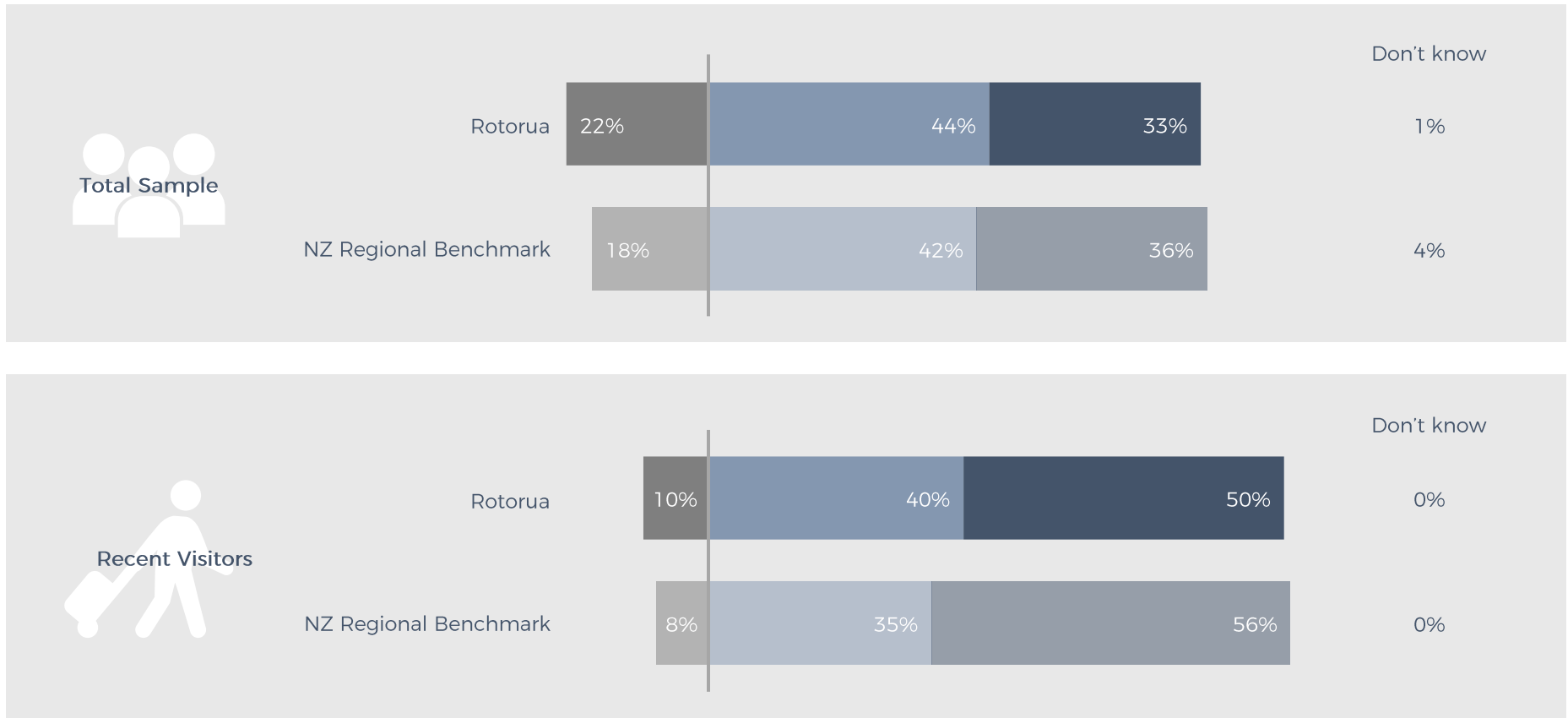


	YE Jun 2021	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Volcanic & Geothermal	70%	73%	71%	70%	72%
Māori / Pacific Culture	66%	64%	62%	63%	63%
Scenic Sight-Seeing	56%	52%	50%	48%	47%
History & Heritage	52%	47%	51%	48%	45%
Spa & Wellness	49%	47%	47%	46%	44%
Family Activities	48%	47%	45%	47%	43%
Nature, Wildlife & Eco-tourism	45%	38%	39%	38%	37%
Walking & Hiking	41%	38%	40%	41%	36%
Gardens, Parks & Reserves	39%	37%	36%	35%	35%
Restaurants, Cafés & Bars	39%	36%	37%	35%	33%
Arts & Culture	40%	35%	35%	32%	30%
Adrenaline Activities	35%	31%	31%	30%	30%
Cycling / Mountain Biking	35%	32%	31%	31%	29%
Fishing or Hunting*	-	-	22%	22%	21%
Water-based Activities	24%	20%	21%	19%	18%
Shopping	18%	16%	17%	17%	15%
Events, Concerts & Festivals	16%	15%	15%	14%	14%
Golf*	-	-	12%	11%	9%
Wineries, breweries or distilleries*	-	-	5%	4%	5%
Casinos / Gambling	5%	4%	4%	4%	3%
Skiing / Snowboarding	4%	3%	3%	3%	3%
Don't know/None of the above	4%	2%	3%	3%	2%
Base: Module sample (n=)	2,482	1,158	1,807	2,171	2,201



# DESTINATION APPEAL

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



■ Not very appealing / Not at all appealing   ■ Somewhat appealing   ■ Highly appealing

# DESTINATION APPEAL

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



	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Highly Appealing	40%	38%	37%	39%	34%	36%	33%
Somewhat Appealing	44%	44%	43%	42%	42%	40%	44%
Not very Appealing	12%	13%	13%	13%	17%	17%	16%
Not at all Appealing	3%	3%	4%	5%	6%	7%	6%
Don't know/NA	1%	2%	2%	1%	1%	1%	1%
Base: Heard of Rotorua, excluding residents	2,441	2,450	2,457	3,689	3,727	3,570	3,549

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Highly Appealing	57%	54%	50%	57%	54%	53%	50%
Somewhat Appealing	33%	38%	38%	35%	36%	35%	40%
Not very Appealing	7%	5%	10%	6%	8%	9%	8%
Not at all Appealing	2%	1%	2%	1%	2%	3%	2%
Don't know/NA	1%	1%	0%	0%	0%	0%	0%
Base: Visited Rotorua P12M	592	572	542	690	639	571	551

# NET PROMOTOR SCORE (NPS)

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 (or destination). A 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.



# PROPENSITY TO VISIT

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



**37%** of New Zealanders who intend to travel domestically in the next 12 months are likely to visit Rotorua

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Definitely will	14%	14%	13%	12%	11%	14%	12%
Probably will	22%	23%	22%	23%	24%	23%	25%
May or may not	29%	29%	30%	28%	26%	24%	26%
Probably will not	11%	11%	10%	24%	24%	24%	23%
Definitely will not	24%	24%	24%	14%	15%	15%	15%
Base: Total Sample (n=)	2109	2136	2145	3134	3218	2975	2920

**69%** of recent domestic visitors to Rotorua intend to return within the next 12 months

	YE Jun 2019	YE Jun 2020	YE Jun 2021	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Definitely will	31%	32%	32%	31%	30%	35%	32%
Probably will	35%	35%	33%	35%	38%	39%	37%
May or may not	23%	20%	23%	23%	22%	16%	19%
Probably will not	3%	3%	3%	8%	8%	7%	11%
Definitely will not	9%	10%	9%	2%	3%	4%	2%
Base: Recent Visitors (n=)	560	533	494	626	590	535	495

# PROSPECTIVE VISITOR PROFILE

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



	Total Sample	Prospective Visitors
Region of Residence		
Northland	4%	3%
Auckland	34%	42% ▲
Waikato	10%	16% ▲
Bay of Plenty	5%	8% ▲
Tairāwhiti / Gisborne	0%	1% ▲
Hawke's Bay	4%	6%
Taranaki	3%	2%
Manawatū-Whanganui	5%	4%
Wellington (& Wairarapa)	11%	9%
Tasman	1%	0% ▼
Nelson	2%	1%
Marlborough	1%	1%
West Coast	0%	0%
Canterbury	13%	5% ▼
Otago	5%	2% ▼
Southland	2%	0% ▼
North Island (NET)	76%	92% ▲
South Island (NET)	24%	8% ▼

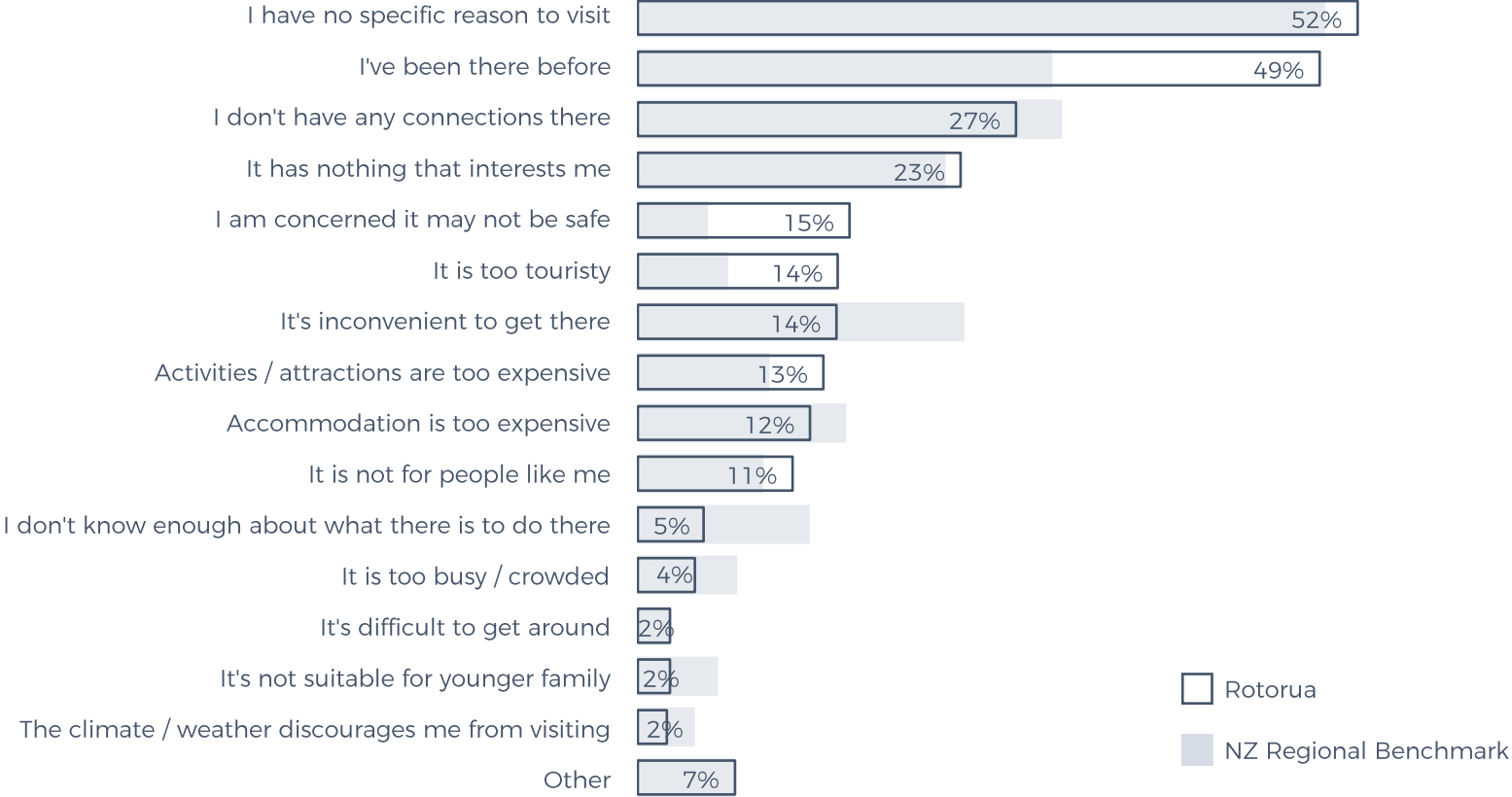
	Total Sample	Prospective Visitors
Age		
18-19 years	4%	1% ▼
20-29 years	18%	19%
30-39 years	17%	23% ▲
40-49 years	17%	22% ▲
50-59 years	17%	16%
60-69 years	14%	9% ▼
70+ years	14%	11%
Household Composition		
My husband, wife or partner	59%	65% ▲
My mother and/or father	6%	5%
My children aged under 5	11%	13%
My children aged 5 to 14	18%	30% ▲
My children aged 15 or older	14%	19% ▲
Other family/relatives	9%	10%
Other person(s)	7%	5%
None of the above – I live alone	16%	7% ▼

▲ / ▼ Significantly higher or lower than total sample at 95% confidence



# BARRIERS TO VISITING

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



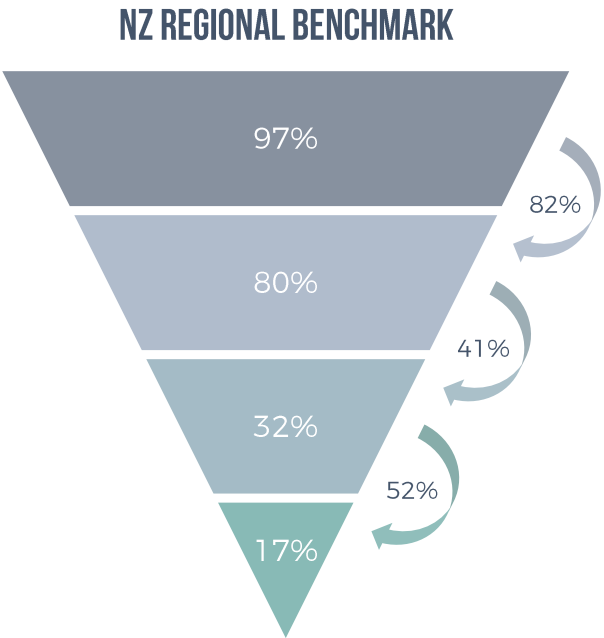
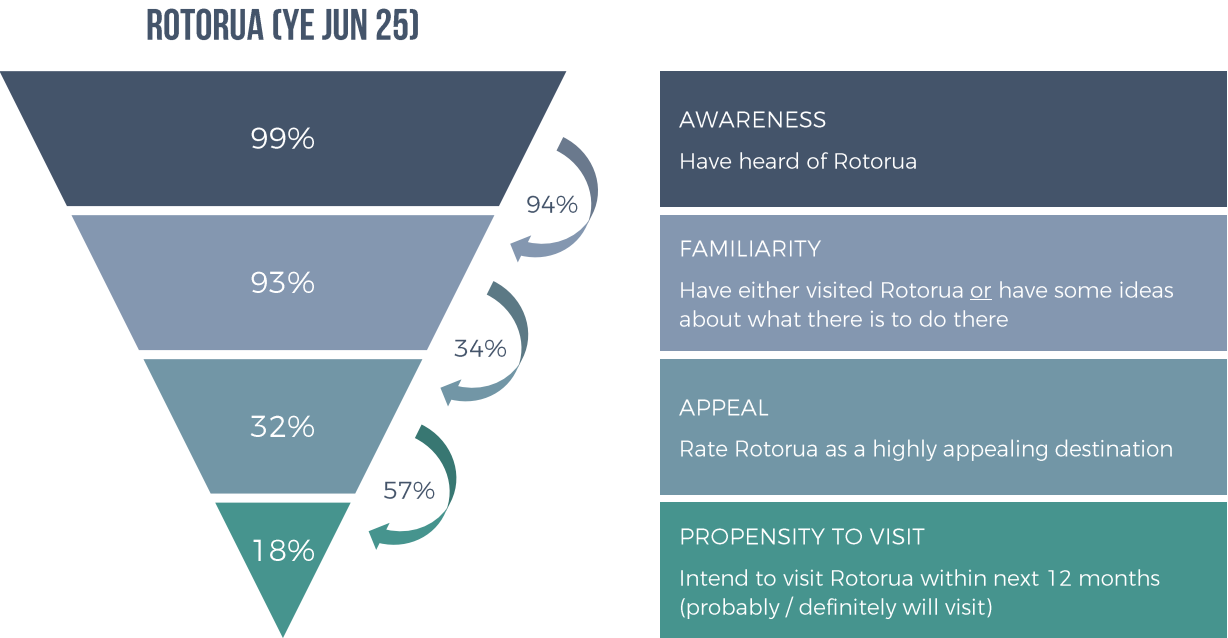
# CONVERTING AWARENESS TO VISITATION



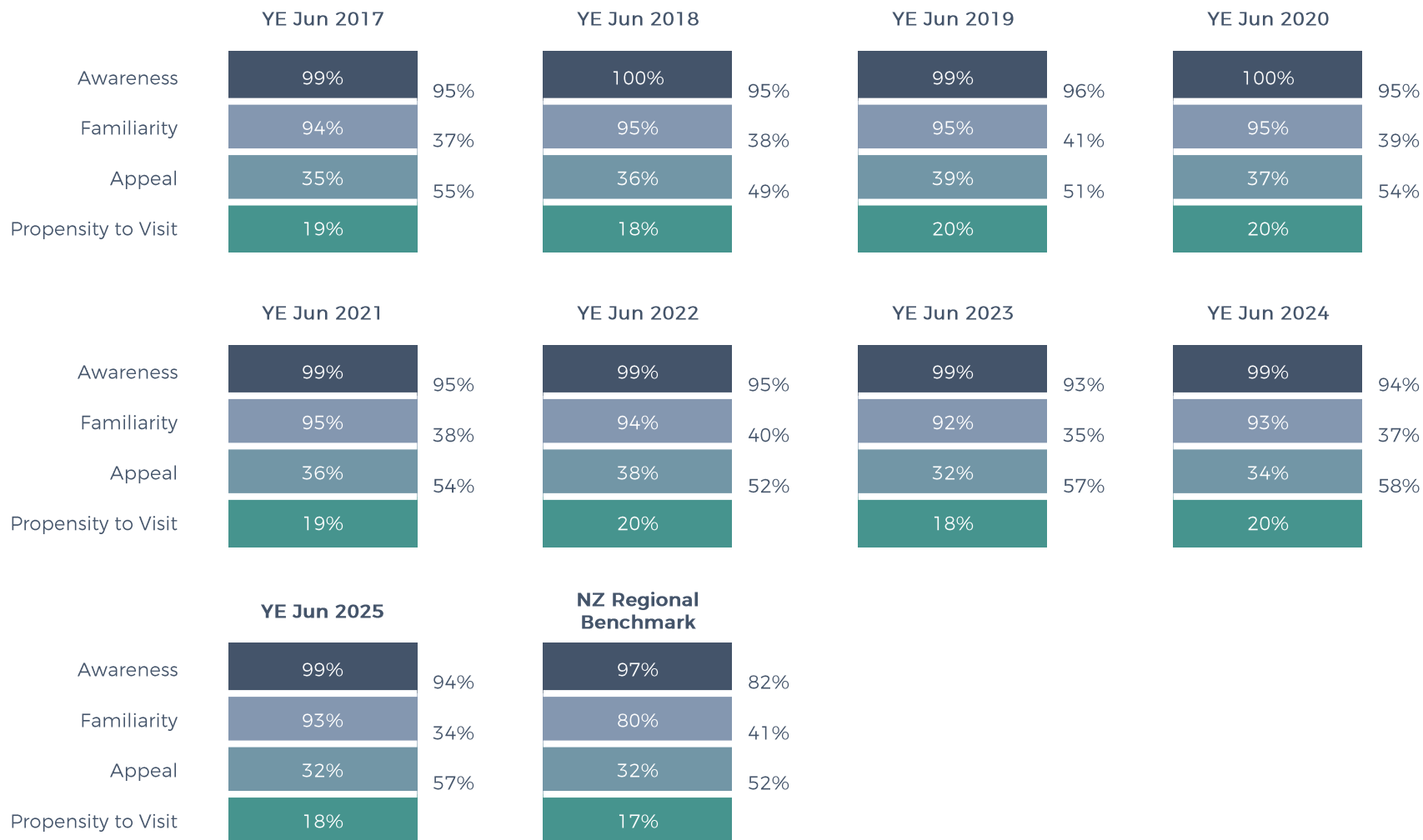
The funnel metric below illustrates the path to purchase, from awareness to likelihood of future visits. It measures awareness of Rotorua, knowledge of the region, appeal as a destination, and the likelihood of visiting. Almost all (99%) New Zealand travellers have heard of Rotorua. As we move down the funnel, each stage introduces a new measure. The 18% at the bottom represents travellers who:

- Have heard of Rotorua
- Are familiar with Rotorua (have either visited or have some ideas about what there is to do there)
- Rate Rotorua as a highly appealing destination
- Intend to visit Rotorua within the next 12 months

The smaller numbers on the right indicate conversion between stages.



# CONVERTING AWARENESS TO VISITATION



A woman wearing a light-colored fedora and a white sweater is seen from behind, standing on a wooden suspension bridge. The bridge has thick wooden planks and ropes. The background is a dense, out-of-focus forest with tall trees. The entire image has a blue tint.

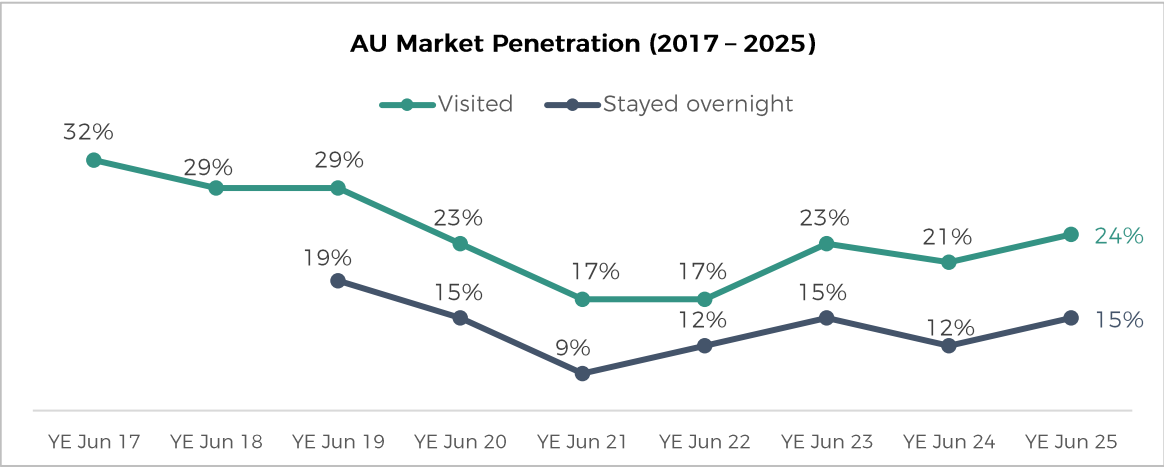
## AUSTRALIAN TRAVEL MARKET

# MARKET PENETRATION

In the past 12 months, where (if anywhere) have you travelled?



Base: Total Sample (YE Jun 25) - AU Travellers Visited NZ in Past 12 Months (n=703)



# RECENT VISITOR PROFILE

In the past 12 months, where (if anywhere) have you travelled?



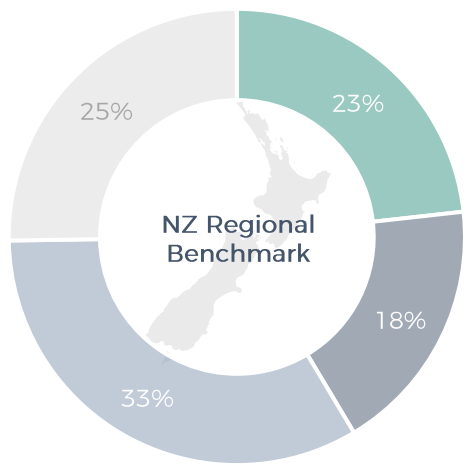
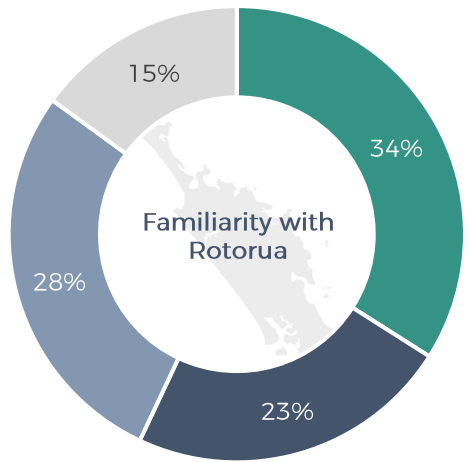
	Total Sample	Recent Visitors
Region of Residence		
Australian Capital Territory	2%	2%
New South Wales	31%	34%
Northern Territory	1%	2%
Queensland	20%	23%
South Australia	7%	4%
Tasmania	2%	2%
Victoria	26%	23%
Western Australia	10%	10%

	Total Sample	Recent Visitors
Age		
18-19 years	3%	1%
20-29 years	17%	20%
30-39 years	19%	26%
40-49 years	16%	19%
50-59 years	16%	17%
60-69 years	15%	9% ▼
70+ years	14%	8% ▼
Household Composition		
My husband, wife or partner	60%	69% ▲
My mother and/or father	6%	5%
My children aged under 5	10%	11%
My children aged 5 to 14	20%	27% ▲
My children aged 15 or older	15%	15%
Other family/relatives	8%	5%
Other person(s)	5%	5%
None of the above – I live alone	16%	13% ▼

▲/ ▼ Significantly higher or lower than total sample at 95% confidence

# FAMILIARITY

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



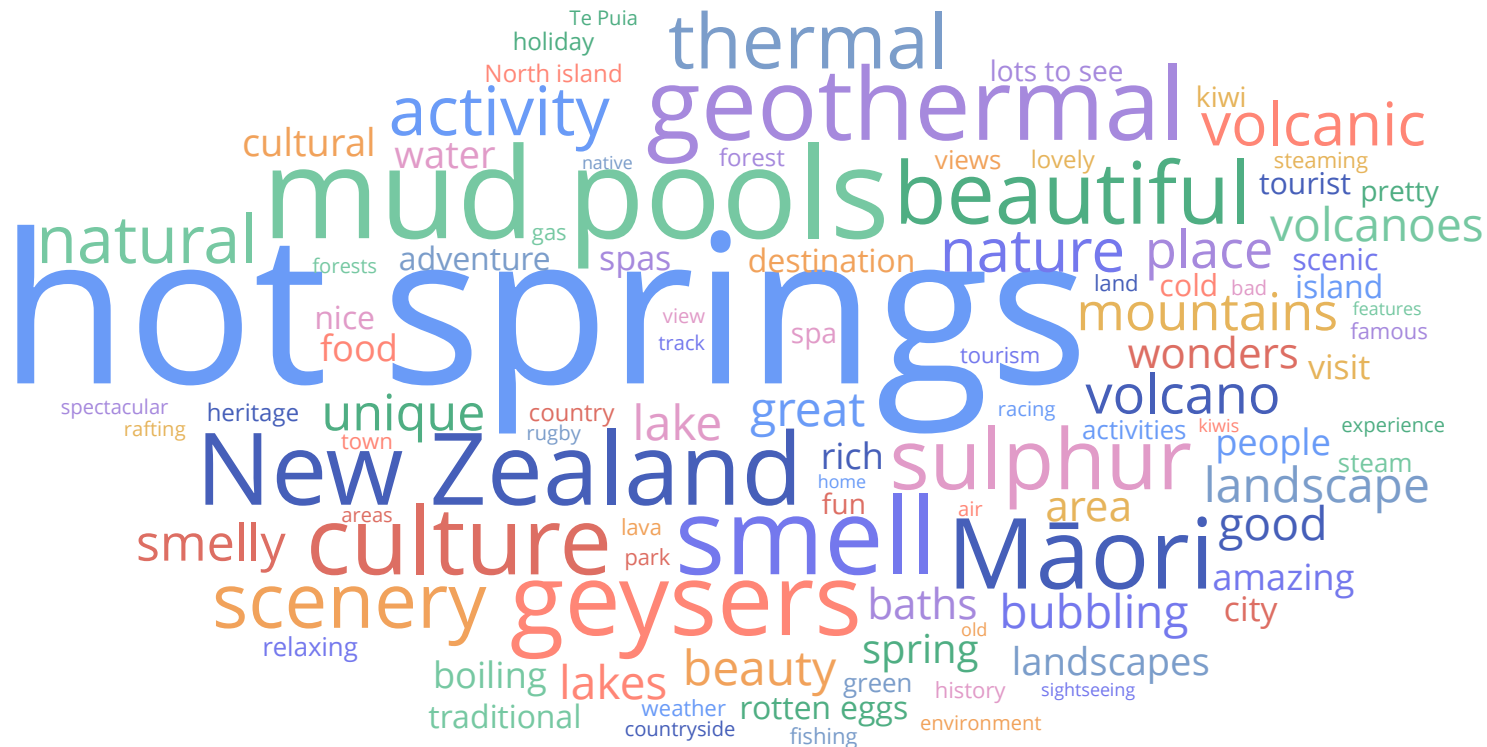
- Have visited (ever)
- Have never visited but have some ideas about what you can do there
- Have never visited and don't know much about what you can do there
- Have never heard of



**34%** of Australian travellers have visited Rotorua (ever)

## TOP-OF-MIND ASSOCIATIONS

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





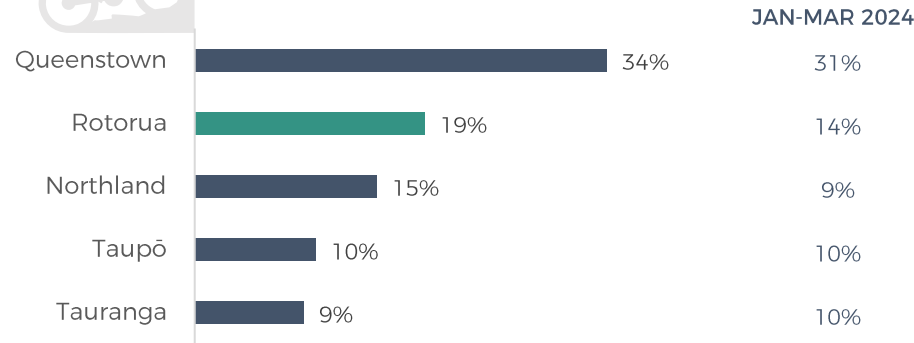
# POSITIONING

Which, if any, of the following destinations is...?



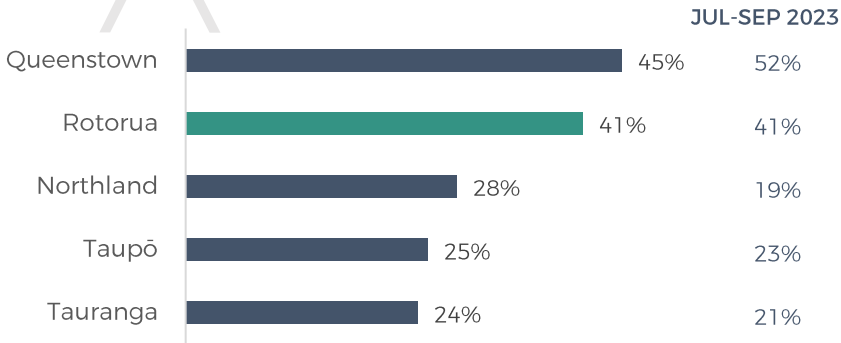
(JAN-MAR 2025)

## A TOP MOUNTAIN BIKING DESTINATION



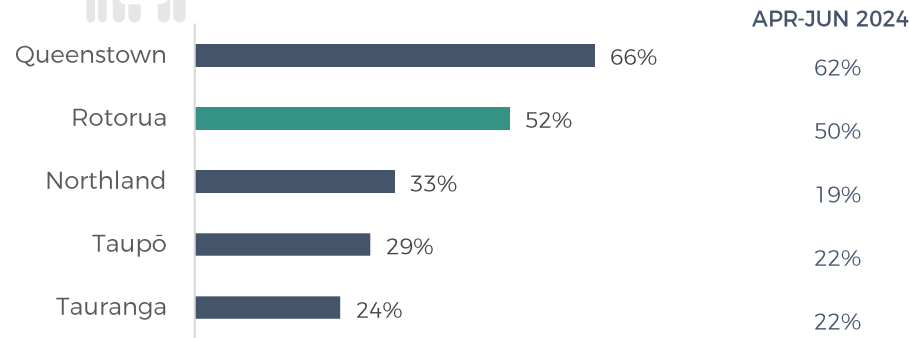
(JUL-SEP 2024)

## A PLACE YOU CAN RELAX AND UNWIND



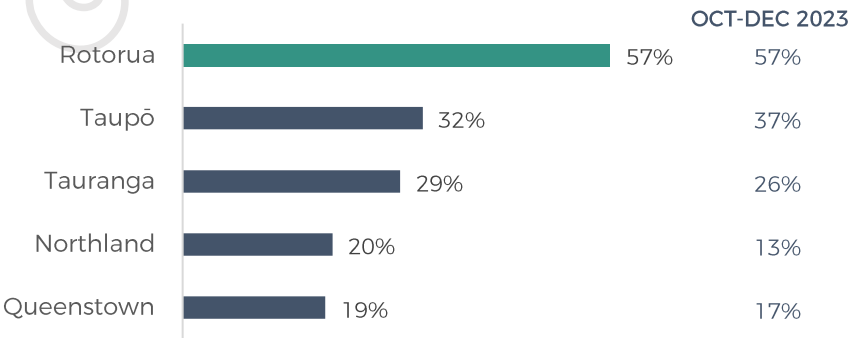
(APR-JUN 2025)

## A GOOD PLACE TO TAKE THE FAMILY ON HOLIDAY



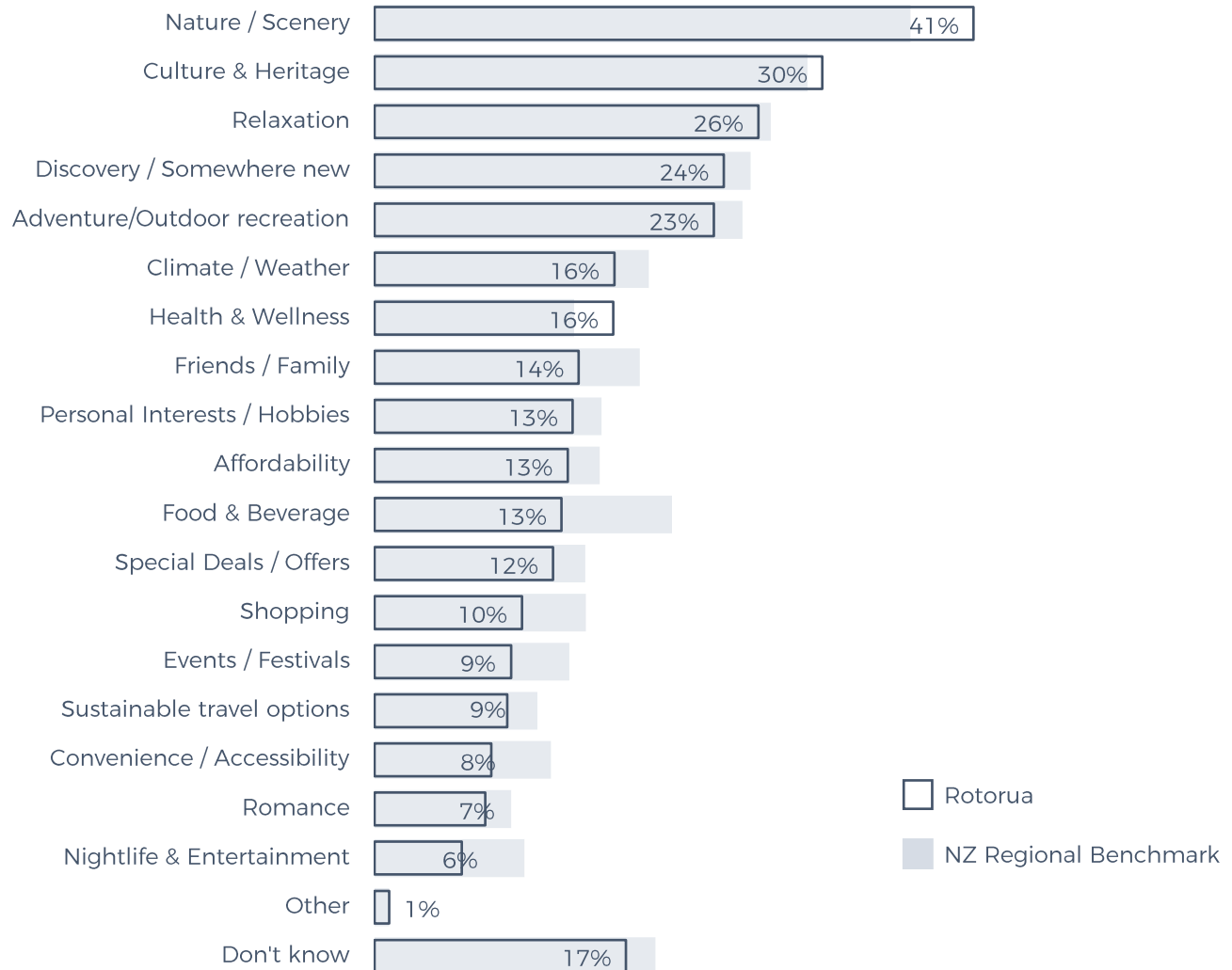
(OCT-DEC 2024)

## A PLACE TO EXPERIENCE AUTHENTIC MĀORI CULTURE



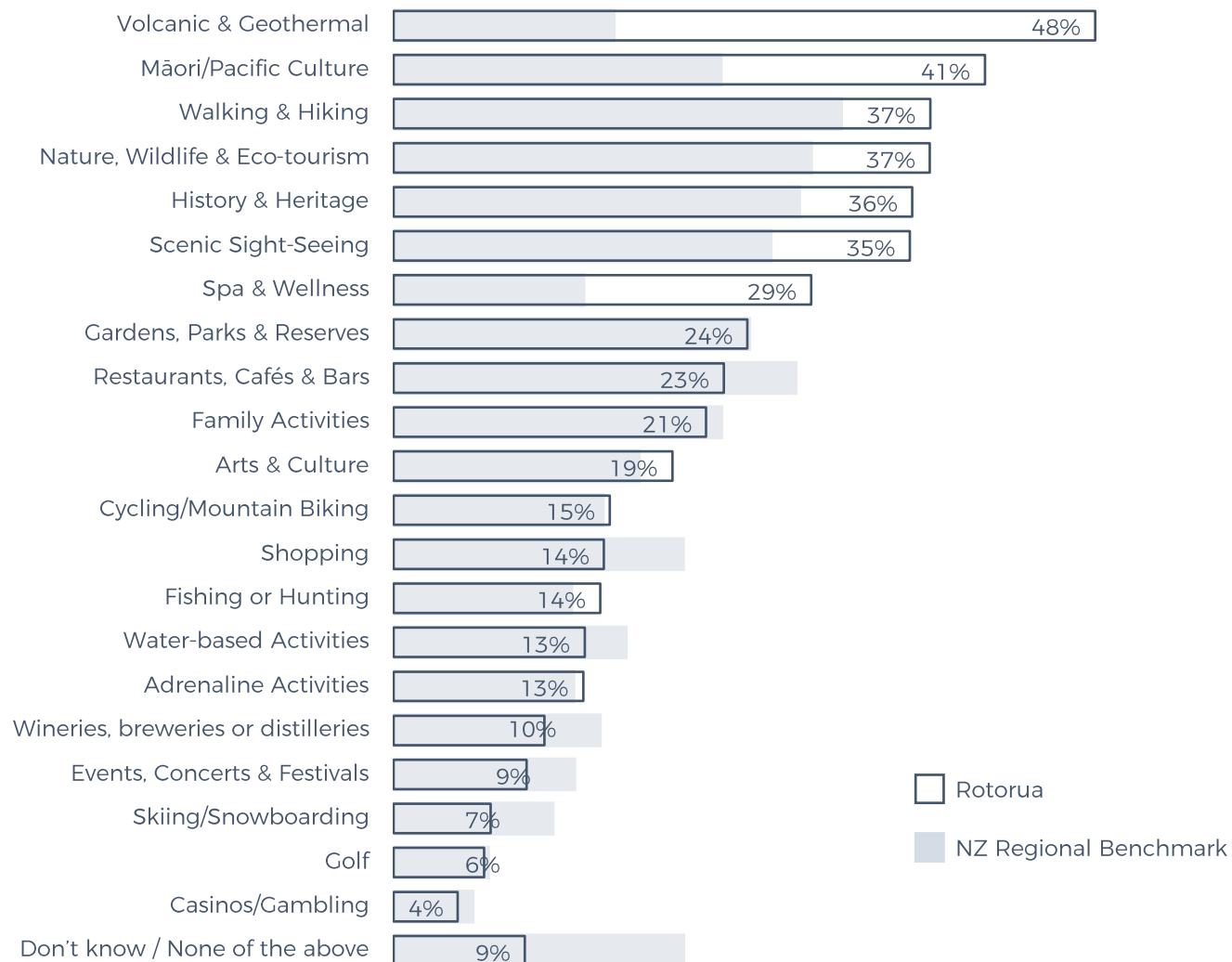
# DESTINATION DRIVERS

Why might someone choose to visit Rotorua instead of another New Zealand destination?



# ACTIVITIES / EXPERIENCES

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



# ACTIVITIES / EXPERIENCES

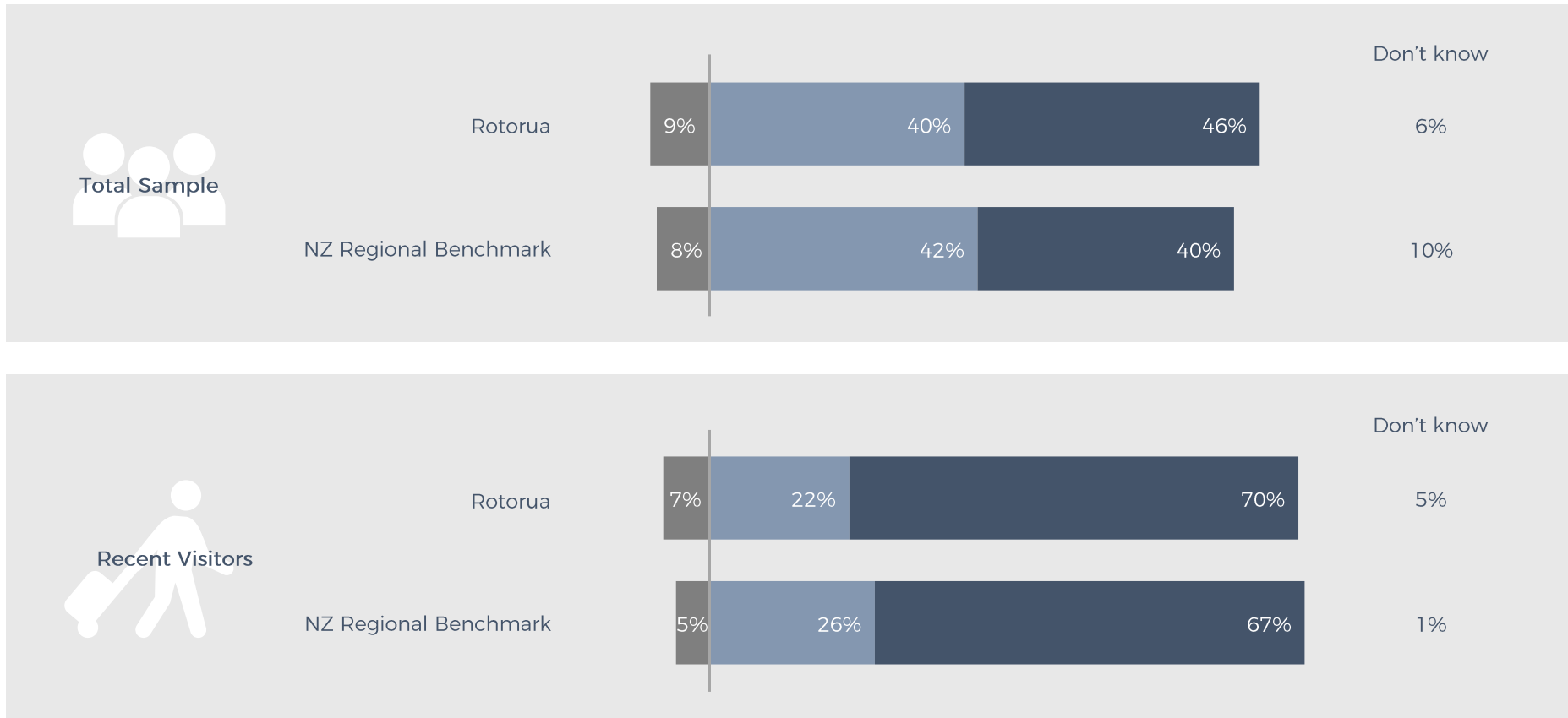
Which, if any, of the following activities or experiences do you associate with Rotorua?



	YE Jun 2021	YE Jun 2022	YE Jun 2023	YE Jun 2024	YE Jun 2025
Volcanic & Geothermal	42%	47%	48%	49%	48%
Māori/Pacific Culture	34%	36%	38%	41%	41%
Walking & Hiking	24%	26%	34%	36%	37%
Nature, Wildlife & Eco-tourism	28%	30%	32%	37%	37%
History & Heritage	26%	26%	32%	35%	36%
Scenic Sight-Seeing	31%	29%	31%	33%	35%
Spa & Wellness	24%	22%	25%	26%	29%
Gardens, Parks & Reserves	18%	18%	21%	24%	24%
Restaurants, Cafés & Bars	16%	16%	20%	20%	23%
Family Activities	19%	17%	19%	22%	21%
Arts & Culture	17%	14%	17%	18%	19%
Cycling/Mountain Biking	11%	10%	11%	14%	15%
Shopping	12%	10%	13%	13%	14%
Fishing or Hunting*	-	-	13%	13%	14%
Water-based Activities	12%	10%	11%	11%	13%
Adrenaline Activities	11%	10%	10%	11%	13%
Wineries, breweries or distilleries*	-	-	8%	10%	10%
Events, Concerts & Festivals	9%	7%	7%	7%	9%
Skiing/Snowboarding	7%	6%	6%	6%	7%
Golf*	-	-	5%	6%	6%
Casinos/Gambling	6%	4%	3%	4%	4%
Don't know/None of the above	16%	17%	14%	10%	9%
Base: Module sample (n=)	2,143	1,221	1,544	2,020	1,983

# DESTINATION APPEAL

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



■ Not very appealing / Not at all appealing   ■ Somewhat appealing   ■ Highly appealing

# DESTINATION APPEAL

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



	YE Jun 19	YE Jun 20	YE Jun 21	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Highly Appealing	42%	40%	42%	45%	46%	40%	46%
Somewhat Appealing	40%	40%	38%	39%	38%	43%	40%
Not very Appealing	7%	9%	8%	7%	6%	6%	7%
Not at all Appealing	2%	3%	4%	2%	2%	1%	2%
Don't know/NA	9%	8%	8%	7%	8%	10%	5%
Base: Heard of Rotorua	2,123	2,138	2,143	3,021	3,061	3,015	3,101

	YE Jun 19	YE Jun 20	YE Jun 21	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Highly Appealing	67%	61%	72%	69%	70%	68%	70%
Somewhat Appealing	23%	33%	22%	26%	26%	28%	22%
Not very Appealing	8%	7%	4%	3%	2%	3%	6%
Not at all Appealing	1%	0%	0%	3%	2%	2%	1%
Don't know/NA	1%	0%	3%	0%	0%	1%	1%
Base: Visited Rotorua P12M	146	122	74	39	97	120	171

# NET PROMOTOR SCORE (NPS)

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 (or destination). A 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.

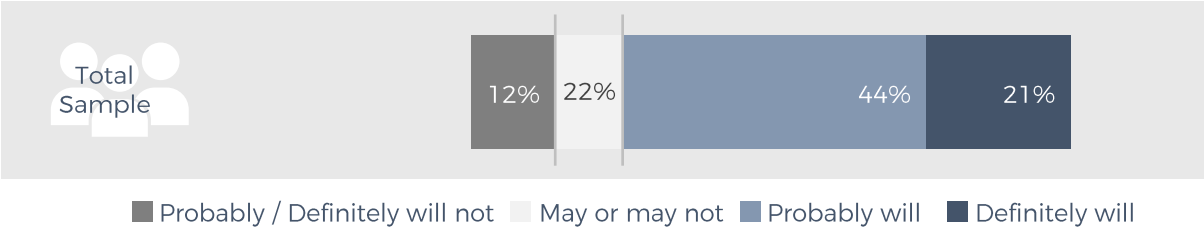


# PROPENSITY TO VISIT

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



**65%** of AU travellers who intend to visit New Zealand in the next 12 months intend to visit Rotorua



Base: Total Sample - AU Travellers Intend to Visit NZ in Next 12 Months Heard of Rotorua (n=1243)

	YE Jun 20	YE Jun 21	YE Jun 22	YE Jun 23	YE Jun 24	YE Jun 25
Definitely will	20%	28%	24%	24%	20%	21%
Probably will	36%	35%	44%	41%	43%	44%
May or may not	28%	24%	22%	23%	24%	22%
Probably / Definitely will not	16%	13%	11%	13%	13%	12%
Base: (n=)	793	939	1,138	1,254	1,249	1,243



# PROSPECTIVE VISITOR PROFILE

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



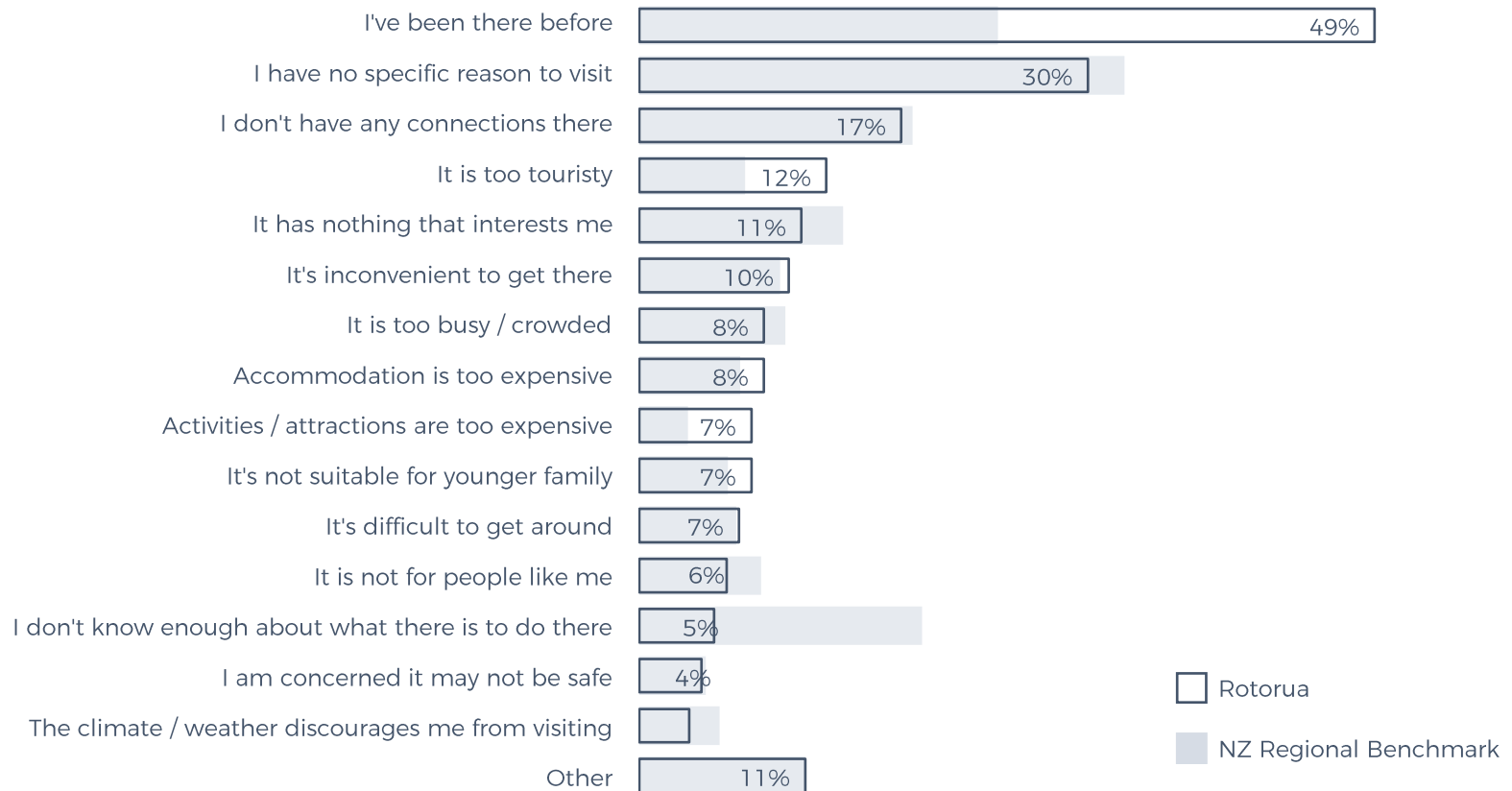
	Total Sample	Prospective Visitors
Region of Residence		
Australian Capital Territory	2%	3%
New South Wales	31%	32%
Northern Territory	1%	1%
Queensland	20%	20%
South Australia	7%	6%
Tasmania	2%	3%
Victoria	26%	26%
Western Australia	10%	8%

	Total Sample	Prospective Visitors
Age		
18-19 years	3%	0% ▼
20-29 years	17%	22% ▲
30-39 years	19%	32% ▲
40-49 years	16%	14%
50-59 years	16%	12% ▼
60-69 years	15%	13%
70+ years	14%	7% ▼
Household Composition		
My husband, wife or partner	60%	68% ▲
My mother and/or father	6%	8%
My children aged under 5	10%	13%
My children aged 5 to 14	20%	31% ▲
My children aged 15 or older	15%	14%
Other family/relatives	8%	7%
Other person(s)	5%	3%
None of the above – I live alone	16%	9% ▼

▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# BARRIERS TO VISITING

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



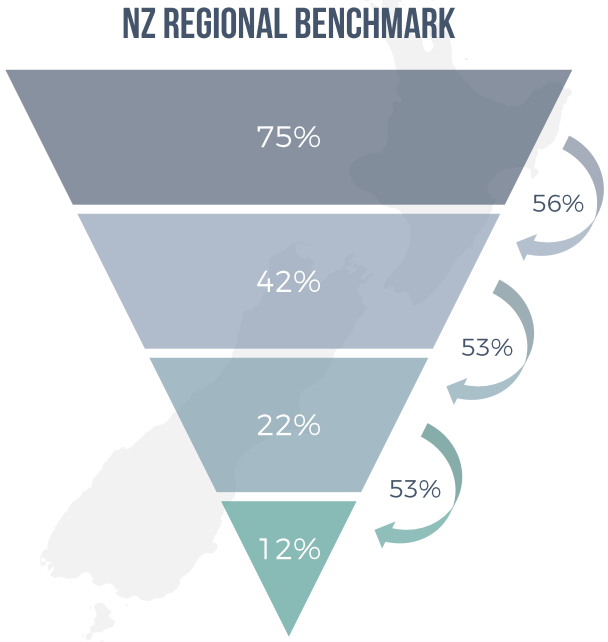
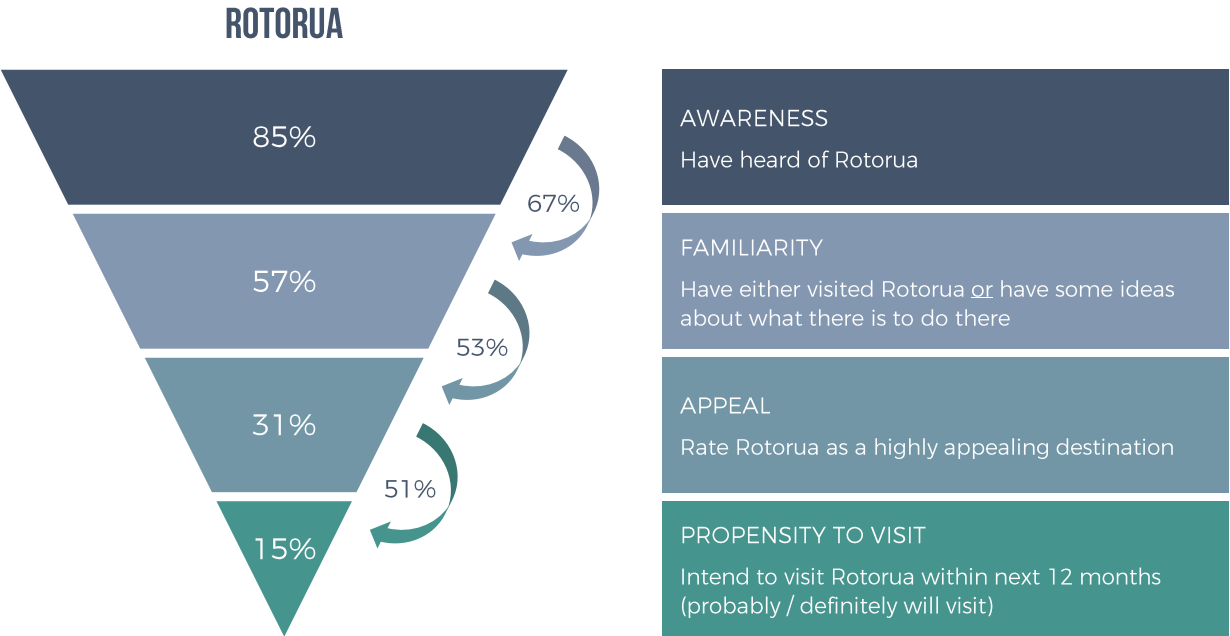
# CONVERTING AWARENESS TO VISITATION



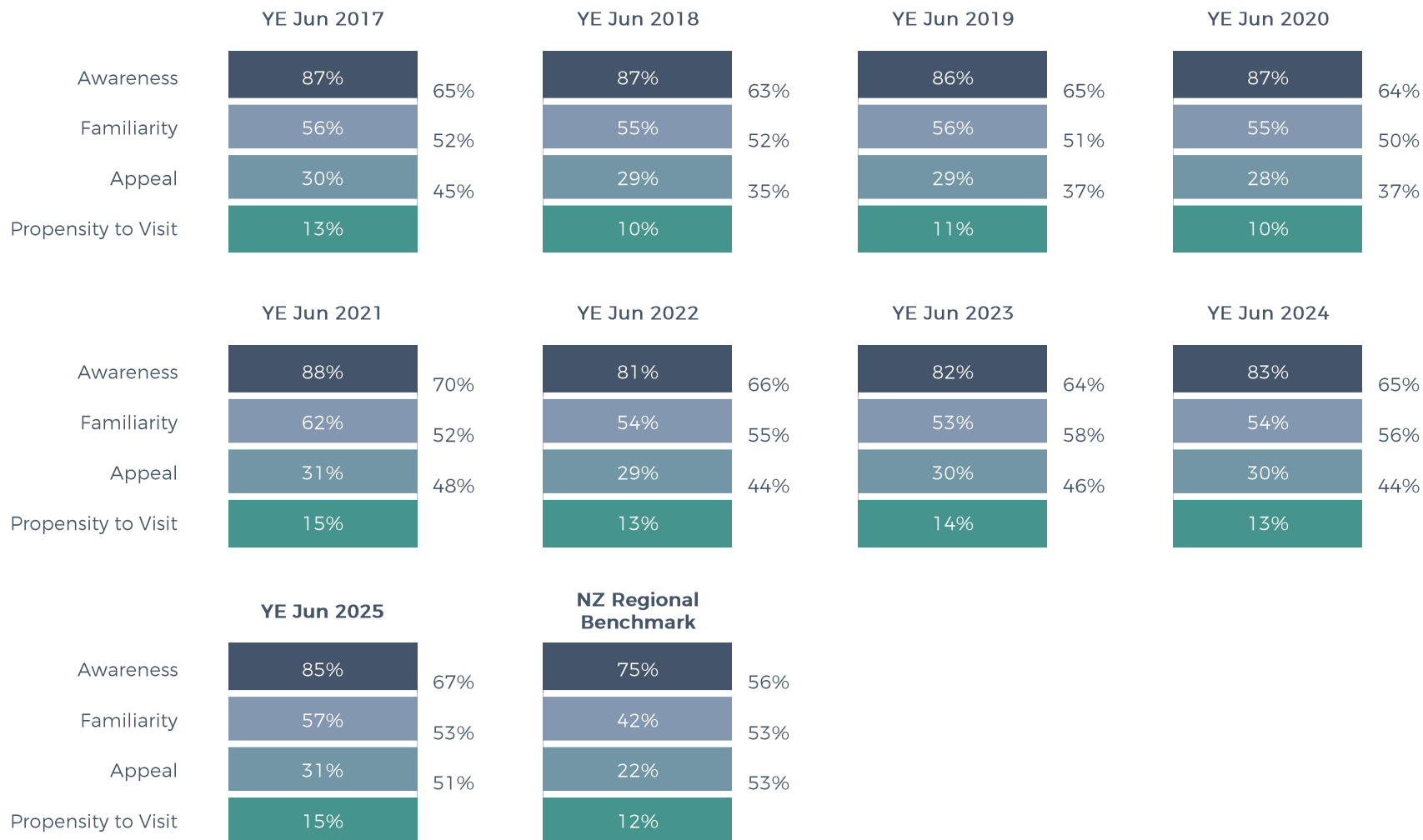
The funnel metric below illustrates the path to purchase, from awareness to likelihood of future visits. It measures: awareness of Rotorua, knowledge of the region, appeal as a destination, and the likelihood of visiting. The majority (85%) of Australian travellers have heard of Rotorua. As we move down the funnel, each stage introduces a new measure. The 15% at the bottom represents travellers who:

- Have heard of Rotorua
- Are familiar with Rotorua (have either visited or have some ideas about what there is to do there)
- Rate Rotorua as a highly appealing destination
- Intend to visit Rotorua within the next 12 months

The smaller numbers on the right indicate conversion between stages.



# CONVERTING AWARENESS TO VISITATION





angus  
& ASSOCIATES