

DESTINATION QUEENSTOWN DOMESTIC WINTER CAMPAIGN RESEARCH

MAY 2020

SUMMARY

Approximately one in five Aucklanders and lower South Island residents will travel domestically this Winter

41% of Aucklanders and 40% of Lower South Island residents state that they will, either definitely or probably, travel domestically for leisure purposes this Winter (between June – August). Applying a down-weighting algorithm based on the original developed by Urban & Hauser¹, which corrects stated propensities given in a survey to make them more reflective of what is likely to actually happen in real life, suggests that approximately 21% of Aucklanders and 20% of Lower South Island residents will actually travel within New Zealand for a holiday or short-break this Winter.

For those unlikely to travel domestically this Winter, barriers include personal financial situations, concern about catching the COVID-19 virus, and a preference for not travelling during the Winter months. Travel limitations such as reduced flights and/or increased cost of flights, and concern around losing money due to potential COVID-19 related cancellations if there is another outbreak are also notable barriers to domestic leisure travel at this time.

Queenstown is one of the most popular destinations being considered for a short-break this Winter

For Auckland residents, Queenstown and the Northland region are the most popular destinations for travel this Winter. For Lower South Island residents, Queenstown and the wider Canterbury region are the most popular destinations.

- 12% of Aucklanders and 15% of Lower South Island residents are **considering** visiting Queenstown this Winter
- 7% of Aucklanders and 8% of Lower South Island residents are **planning** to visit Queenstown this Winter (have either booked trip or are 'definitely planning to visit')

Consistent with usual domestic trends, visitors to Queenstown this Winter are more likely to be younger (25 – 34 years) and less likely to be in the older age cohort (60+ years). This skew is particular notable for Auckland residents.

For those who are considering visiting Queenstown, but have not yet made firm plans, the decision to visit will be based on primarily on cost (of flights and accommodation) and personal financial situations. The COVID-19 situation (new cases and alert level updates), what's open/available in the Queenstown region, work commitments, and snow/weather conditions will also factor into the decision.

SUMMARY

Domestic visitors are looking forward to a relaxing getaway to spend time with loved ones and show support for the region/industry

Domestic visitors want to visit Queenstown to relax, spend time with family/friends/partners, explore and discover new places/experiences, undertake tourism activities, and to experience adventure and excitement. Less than one in five visitors are considering Queenstown for the purpose of visiting friends or family living in the region.

Queenstown's natural environment/scenery is the main drawcard attracting domestic visitors to the region. The accommodation options, tourism activities/experiences and food/beverage offerings available in the region are key drivers for choosing to visit Queenstown over other destinations. Ease of access (i.e. convenience to fly/drive to) is also an important factor, especially for the Lower South Island drive market. The tourism activities/experiences available in the region, the ski resorts, and Queenstown's nightlife/après ski are stronger drivers for the Auckland market than for Lower South Island residents. Half of all Auckland visitors intend to ski/snowboard while in the region.

There is a clear sense of support for the tourism industry and the region with a number of potential visitors commenting on their intention to spend more money than they usually would on this trip. Domestic travellers are looking forward to a more relaxed time in Queenstown, without the usual crowds of international visitors. Many are counting on reduced accommodation rates and are looking forward to staying in accommodation that they might not usually be able to.

Lower South Island residents are likely to spend the same number of nights in Queenstown that they usually would for trips during the Winter months. Auckland residents intend to stay either the same number of nights or longer than they usually would (21% intend to stay longer and 5% shorter). Across the markets, Auckland residents would stay on average 3-5 nights in the region, Canterbury 3-4 nights, Otago 2-3 nights and Southland 1-2 nights. The vast majority of visitors (95% of Aucklanders and 89% of Lower South Island residents intend to stay in paid accommodation, primarily through airbnb or in hotels.

There were comments suggesting that some domestic visitors may delay their trip later in the season than they might usually, to wait and see what happens with COVID-19 (new cases and alert level updates) and/or the cost and availability of accommodation in the region.

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BACKGROUND & RESEARCH APPROACH

With the New Zealand borders closed to international visitors due to the COVID-19 global pandemic, Destination Queenstown is looking to understand what domestic travel to Queenstown will look like over the next few months to inform the planning of a domestic Winter campaign.

A 10 minute custom online survey was designed in consultation with Destination Queenstown and was programmed and hosted by getsmart – a specialist system for the collection and management of survey data. The survey was completed between 14th – 21st May 2020. Note that Thursday 14th May was the first day of COVID-19 Alert Level 2, where domestic travel was permitted.

A sample of Auckland and Lower South Island residents was recruited via the Dynata (SSI) online consumer panel. Lower South Island was defined as Canterbury (excluding Kaikoura, Hurunui and Waimakariri districts), Otago and Southland. Residents of Queenstown-Lakes district (including Queenstown, Wanaka, Glenorchy and Kingston) and Cromwell-Bannockburn were excluded from the research. The sample represented a broad mix of gender and age within each region. Only respondents aged 20+ years were eligible to participate.

A total sample of n=1,899 respondents participated in the survey and n=253 of these were intending to travel this Winter and were considering visiting Queenstown as a destination.

	Total Sample	Considering Visiting Queenstown
Auckland	1,006	121
Lower South Island	893	132
- Canterbury	573	80
- Otago	217	40
- Southland	103	12
	n=1,899	n=253

An aerial photograph of a town and a large lake, with snow-capped mountains in the background. The image is dimmed with a dark blue overlay. A large white circle is positioned on the left side of the image, containing the text 'PROPENSITY TO TRAVEL THIS WINTER'.

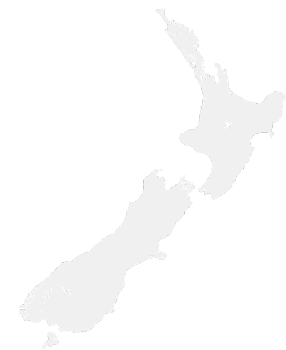
**PROPENSITY TO TRAVEL
THIS WINTER**

PROPENSITY TO TRAVEL THIS WINTER

While many of us are dreaming of taking a holiday... realistically, how likely are you to travel within New Zealand for leisure purposes this Winter (between June – August)?

41% of Aucklanders and 40% of Lower South Island residents state that they will, either definitely or probably, travel domestically for leisure purposes this Winter (between June – August). Applying a down-weighting algorithm based on the original developed by Urban & Hauser¹, which corrects stated propensities given in a survey to make them more reflective of what is likely to actually happen in real life, suggests that approximately 21% of Aucklanders and 20% of Lower South Island residents will actually travel within New Zealand for a holiday or short-break this Winter.

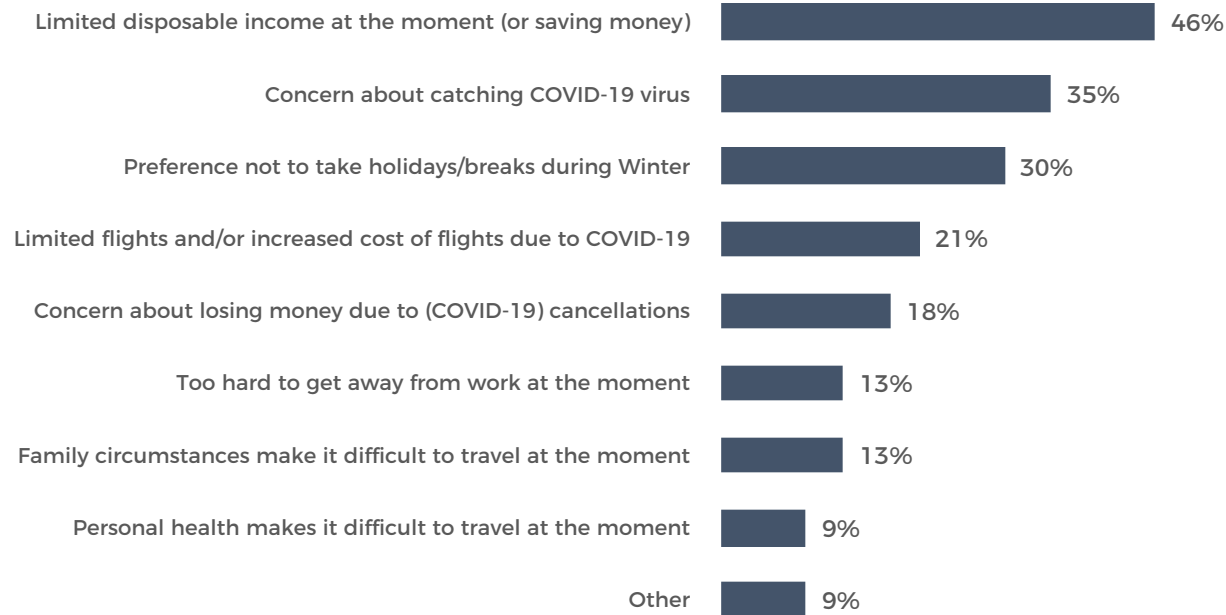
	Auckland	Lower South Island	Canterbury	Otago	Southland
Stated Propensity to Travel					
Definitely will	18%	19%	19%	21%	14%
Probably will	23%	21%	22%	19%	20%
May or may not	21%	22%	20%	22%	26%
Probably will not	21%	23%	23%	24%	20%
Definitely will not	17%	15%	15%	14%	19%
Base: Total Sample	1,006	893	573	217	103
Down-Weighted Propensity to Travel					
Definitely will (x 0.8)	14%	15%	15%	17%	11%
Probably will (x 0.25)	6%	5%	6%	5%	5%
May or may not (x 0.05)	1%	1%	1%	1%	1%
Probably will not	-	-	-	-	-
Definitely will not	-	-	-	-	-
% Likely to Travel	21%	22%	22%	23%	18%



Note that the down-weighted propensity to travel figures assume no further outbreaks of COVID-19 in NZ or major economic shifts as these factors would have a significant impact on propensity to travel

BARRIERS TO TRAVEL THIS WINTER

For what reason/s are you unlikely to travel within New Zealand for leisure purposes this Winter? [Select all that apply]




"I just don't believe with COVID it is a good time to travel. I am not overly concerned that I will catch it... just trying my best to still stay in my bubble."

"The kids have had six weeks with no school. I will not take them out for a holiday."

"I know it's legal but I feel I will be playing a small part to help prevent a second wave by not travelling."

"I'm fighting to keep my business afloat. Financially I can't even begin to think about spending money on a holiday."

Base: Definitely/Probably Will Not Travel (n=719)

 There are no significant differences in travel barriers between Aucklanders and Lower South Island residents

TRAVEL DESTINATIONS

Which of the following region/s are you considering visiting this Winter? [Select all that apply]

	Auckland	Canterbury	Otago	Southland
Northland	28%	6%	2%	11%
Auckland	21%	11%	20%	6%
Waikato (excluding Taupo and the Coromandel)	11%	3%	6%	6%
Taupo	23%	3%	6%	6%
The Coromandel	16%	5%	5%	6%
Rotorua	25%	5%	3%	11%
Bay of Plenty (including Tauranga; but excluding Rotorua)	16%	6%	3%	3%
Cisborne Region	5%	2%	5%	3%
Taranaki	9%	2%	2%	6%
Hawke's Bay	11%	3%	6%	3%
Manawatu-Whanganui	7%	3%	1%	3%
Wellington (& Wairarapa)	18%	10%	10%	17%
Nelson, Tasman or Marlborough	9%	23%	9%	9%
West Coast	6%	29%	10%	17%
Canterbury	11%	40%	41%	46%
Queenstown (including Arrowtown, Glenorchy and Kingston)	29%	33%	47%	34%
Lake Wanaka (including Lake Hawea, Cardrona, Luggate and Makarora)	13%	22%	34%	26%
Dunedin	6%	17%	19%	37%
Central Otago (including Alexandra, Cromwell, Roxburgh and Ranfurly)	6%	15%	37%	26%
Southland	8%	15%	22%	29%
Base: Definitely/Probably Will Travel this Winter	415	239	86	35



Those who are considering visiting Queenstown are more likely to also be considering visiting other destinations within the Otago region (Wanaka, Central Otago, and Dunedin), along with the neighbouring Southland region.

Of those intending to travel this Winter, 17% of Aucklanders and 10% of Lower South Island residents are exclusively considering visiting Queenstown.



**DESTINATION
QUEENSTOWN**

QUEENSTOWN AS A DESTINATION THIS WINTER



KEY STATISTICS

12% of Aucklanders and 15% of Lower South Island residents are **considering** visiting Queenstown this Winter

7% of Aucklanders and 8% of Lower South Island residents are **planning** to visit Queenstown this Winter (i.e. have either booked trip or are 'definitely planning to visit')

Of those considering visiting Queenstown this Winter...

32% of potential visitors from Auckland and 11% from the Lower South Island would be visiting Queenstown for the first time

8% of potential visitors from Auckland and 20% from the Lower South Island regularly visit Queenstown during the Winter (i.e. visit at least once each Winter)

12% of potential visitors from Auckland and 8% from the Lower South Island have already booked some aspect/s of their trip

14% of potential visitors from Auckland and 11% from the Lower South Island are likely to make multiple trips to Queenstown this Winter

DECISION FACTORS

What factors are most likely to influence your decision about whether or not you will actually visit Queenstown this Winter?



Cost & Financial Situation (59%)



COVID-19 Situation (14%)



What's Open/Availability (14%)



Work Commitments (12%)



Weather/Snow Conditions (11%)

"If accommodation is set at reasonable prices"

"The availability of good accommodation"

"Cheaper accommodation - too expensive to stay there too long"

"Cost of accommodation, Ability to get leave. Things happening in Queenstown during the time I intend to visit."

"Cost of flights and accommodation. Whether the ski fields are open."

"Cost and what is open in town (in terms of Covid-19 restrictions)"

"If flights can be purchased for family to come down from Auckland at a reasonable price"

"Hotel prices and COVID-19 situation"

"I am awaiting the return of funds from cancelled overseas tours. The amount returned and the cost of NZ travel will be an influence. And of course whether or not the travel will be straightforward."

"If we get helicopter payments it will be on for sure"

"Just waiting to let it calm down with Coronavirus"

"The number of new cases in NZ, discounts/special deals to Queenstown, border opening to foreigners or not"

"Price of flights and accommodation"

"Quality of skiing and how much of the mountains open up"

"The growth rate in the number of new Covid-19 cases each day and percentage of community transmission".

"The increase in the number of Covid cases"

"What activities/wineries are open and accommodation options"

"What happens with my job and my income - I'm a travel agent"

"Whether its open or not"

MOTIVATORS TO VISIT

What are your main reason/s for wanting to visit Queenstown this Winter? [Select all that apply]

	Auckland	Lower South Island
To relax and take time to myself	55%	57%
To spend time with my family, friends, or partner	51%	54%
To explore and discover a new place and/or new experiences	55%	38%
To undertake tourism activities	50%	38%
To experience adventure or excitement	50%	27%
To indulge in comfort and be pampered	27%	22%
To engage in a sport I'm passionate about (e.g. ski, golf, bike, hiking)	22%	20%
To visit friends or family living in the region	14%	23%
To visit a must-see ('bucket list') destination that people talk about	24%	12%
To meet new people and socialise	8%	6%
None of the above	0%	0%
Base: Considering Visiting Queenstown	121	132

DESTINATION DRIVERS

Which of the following are important factors in your decision to visit Queenstown (rather than somewhere else)? [Select all that apply]

	Auckland	Lower South Island
Queenstown's natural environment/scenery	63%	63%
Accommodation options available in Queenstown	46%	48%
Tourism activities/experiences available in Queenstown	51%	36%
Queenstown's food and beverage options (e.g. restaurants, cafés and wineries)	36%	49%
Ease of access (convenient to drive/fly to)	31%	48%
A special deal offered on transport/activities/accommodation	35%	37%
Queenstown's reputation as a world class travel destination	38%	27%
Queenstown's ski resorts	33%	13%
Queenstown's people/culture	27%	20%
Recommendations by family, friends or travel advisor	21%	15%
Queenstown's nightlife and après ski	20%	12%
Other	3%	2%
None of the above	1%	1%
Base: Considering Visiting Queenstown	121	132



Of those considering visiting Queenstown...
3% of Aucklanders and 6% of Lower South Island residents have a 2020 season pass for a Queenstown ski area

AGE PROFILE OF THOSE CONSIDERING QUEENSTOWN

Auckland Residents

	Total Sample	Intend to Travel this Winter	Considering Queenstown
20-24 years	8%	8%	9%
25-29 years	14%	17%	22%
30-34 years	12%	15%	20%
35-39 years	10%	12%	9%
40-44 years	8%	7%	7%
45-49 years	8%	8%	9%
50-54 years	6%	3%	2%
55-59 years	7%	6%	6%
60+ years	26%	23%	16%
	1006	415	121

Lower South Island Residents

	Total Sample	Intend to Travel this Winter	Considering Queenstown
20-24 years	9%	11%	13%
25-29 years	10%	13%	15%
30-34 years	8%	6%	9%
35-39 years	7%	8%	11%
40-44 years	9%	9%	11%
45-49 years	7%	8%	5%
50-54 years	6%	5%	3%
55-59 years	9%	9%	11%
60+ years	34%	31%	22%
	893	360	132

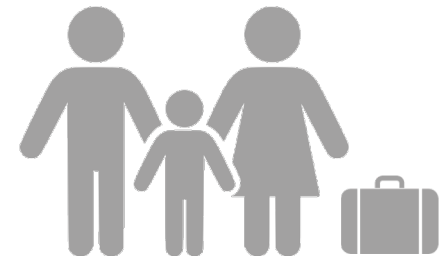


**QUEENSTOWN
TRIP CHARACTERISTICS**

TRAVEL COMPANIONS

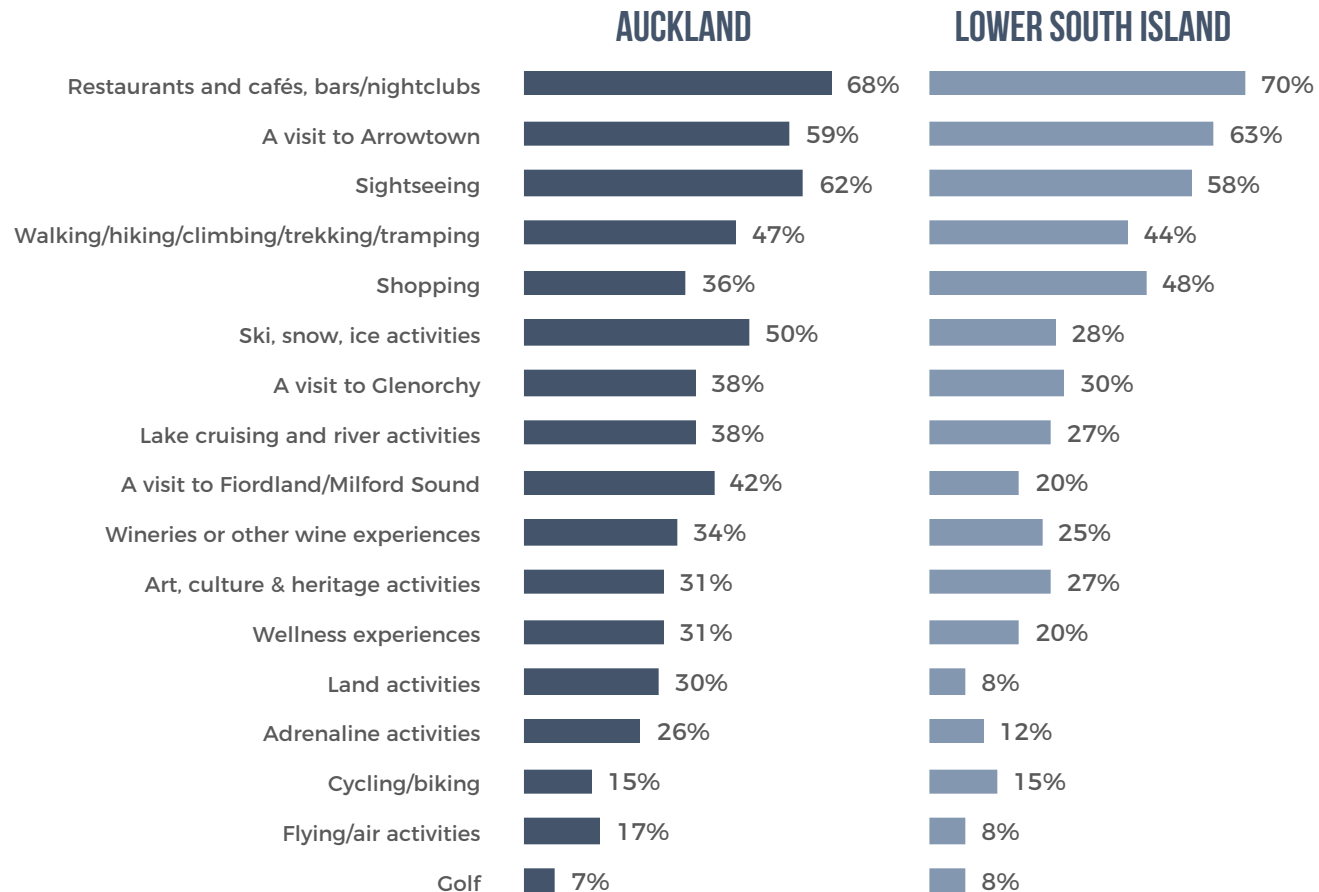
Who would be most likely to travel with you on this trip to Queenstown? [Select all that apply]

	Auckland	Lower South Island
No-one, I would travel on my own	6%	5%
My partner/spouse	68%	76%
- My partner/spouse only (no children or others)	28%	38%
My child or children	36%	30%
Other members of my family (including extended family members)	13%	12%
A friend or friends	26%	23%
Work colleagues	2%	0%
Other people	0%	1%
Base: Considering Visiting Queenstown	121	132



ACTIVITIES/EXPERIENCES IN QUEENSTOWN

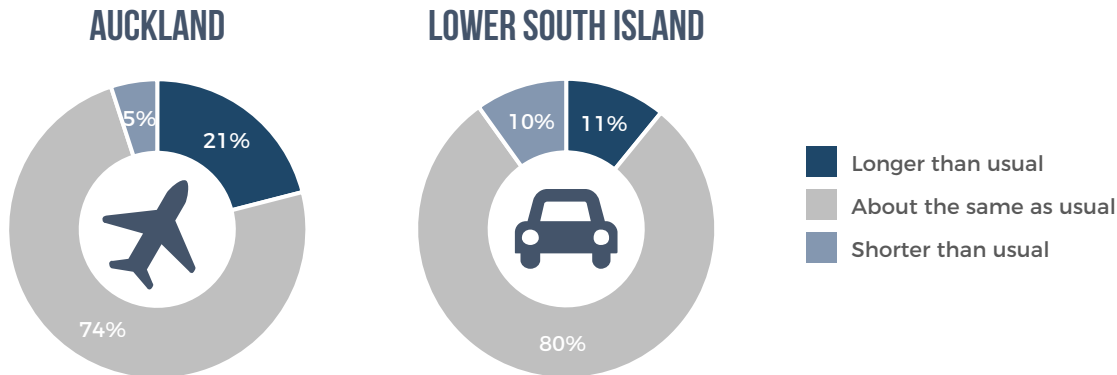
Which of the following are you (or anyone in your travel party) likely to do if you were to visit Queenstown this Winter?



LENGTH OF STAY

How many nights in total would you be likely to stay in the Queenstown region this Winter?
Compared to other trips you've made to the Queenstown region in the Winter, is this...?

	Auckland	Lower South Island	Canterbury	Otago	Southland
None - Daytrip/s only	0%	1%	0%	3%	0%
1 night	0%	6%	3%	10%	17%
2 nights	12%	31%	25%	33%	67%
3 nights	36%	35%	36%	43%	0%
4 nights	24%	8%	10%	8%	0%
5 nights	14%	10%	15%	0%	8%
6 nights	6%	2%	3%	3%	0%
7 nights or more	7%	7%	9%	3%	8%
Base: Considering Visiting Queenstown	121	132	80	40	12



Base: Considering Visiting Queenstown and Have Visited in Previous Winters
(Auckland n=58, Lower South Island n=104)

"[I intend to stay] longer than normal as an international holiday is unlikely this year"

"[I intend to] spend longer than I usually would to decrease the number of trips I would make over the season"

ACCOMMODATION

What would be the main type of accommodation you would stay in if you were to visit Queenstown this Winter?

	Auckland	Lower South Island
Private home/holiday home - no nightly payment required (e.g. with family/friends)	5%	11%
Private home/holiday home - rented (e.g. through Airbnb or similar channels)	23%	20%
Hotel	29%	22%
Motel	9%	18%
Serviced apartment	8%	8%
Backpackers/hostel	2%	4%
Luxury lodge	6%	1%
Bed and Breakfast, Homestay or Farmstay	9%	2%
Camping ground/holiday park (tent, caravan, campervan, cabin or park motel)	4%	4%
Freedom camping (tent, campervan etc.)	1%	1%
Don't know/Unsure at this stage	4%	10%
Base: Considering Visiting Queenstown	121	132



DIFFERENCES IN TRAVEL THIS WINTER

Thinking about all aspects of your potential trip/s to Queenstown this Winter (i.e. accommodation, length of stay and any things you will do in the region), in what way, if at all, is your trip to Queenstown likely to be any different this Winter from previous years?

"Last time I went to visit family, this time I am going to be more of a tourist in Queenstown with my friends"

"It will be much cheaper and the accommodation will be nicer"

"Usually go on impulse this one will be with the intention of supporting our tourism industry"

"We will be able to visit Queenstown hopefully without hordes of international tourists - once in a lifetime!"

"May wait until July or August just to see what happens with Coronavirus"

"In the past when I have been to Queenstown at any time of year it has felt overcrowded so actually I think I would enjoy it more being a little less crowded."

"Not as many people there so will be able to enjoy the area without the difficulties that come with large amounts of people in smaller region. Will hopefully be able to participate in more activities as not as many bookings will be in place. Will try and support as many businesses in the area"

"Due to Covid maybe harder to book in for activities and dinners with social distancing"

"Enjoy less people around and more locals, hope accommodation is cheaper, if so may have multiple trips."

"Spending money on this trip rather than saving for overseas travel like normal. Greater awareness to help the economy - so I'll be spending more (eating out etc) rather than saving pennies ruthlessly."

"It will be more of a 'major' trip since we now cant do international trips with level 2 restrictions. we will also be trying hard to stimulate the local economy more so than usual"

"It will be much more enjoyable without massive crowds of overseas tourists, no huge queues of busses everywhere, no traffic jams, no dangerous tired foreign drivers not used to NZ roads, no hordes of freedom camper vehicles clogging toads and hogging ALL the parking bays/lookout spots, no human poop at all the laybys/lookout points.. in short, Queenstown will have a good flow of local tourists sustaining it without being packed with people to the point of off-putting awfulness."



SAMPLE PROFILE

SAMPLE PROFILE

	Auckland	Lower South Island
Gender:		
Male	44%	39%
Female	56%	61%
Age:		
20-24 years	9%	13%
25-29 years	22%	15%
30-34 years	20%	9%
35-39 years	9%	11%
40-44 years	7%	11%
45-49 years	9%	5%
50-54 years	2%	3%
55-59 years	6%	11%
60+ years	16%	22%
Base: Considering Visiting Queenstown	n=121	n=132

	Auckland	Lower South Island
Household Composition:		
My husband, wife or partner	66%	69%
My mother and/or father	6%	11%
My son(s) or daughter(s) aged under 5	16%	14%
My son(s) or daughter(s) aged 5 to 14	19%	18%
My son(s) or daughter(s) aged 15 or older	10%	11%
Other family/relatives	9%	14%
Other person(s)	14%	14%
None of the above - I live alone	11%	8%
Occupation:		
Employed full-time (35 hours+)	65%	56%
Employed part-time (<35 hours)	13%	17%
Studying	4%	11%
Looking after family and/or home	2%	2%
Looking for work or unemployed	5%	5%
Retired	12%	11%
Beneficiary	1%	1%
Base: Considering Visiting Queenstown	n=121	n=132

