

VISITOR EXPERIENCE SURVEY RESULTS

Queenstown
YE June 2024



The Queenstown Lakes' Visitor Experience Survey is a collaboration between destination Queenstown and Lake Wānaka tourism which seeks to better understand visitor expectations, experiences and behaviours while in the region.

DQ and LWT partner with respected industry researcher Angus & Associates to conduct the primary research. In July 2023 the survey was significantly redesigned to better align with the objectives of *Travel to a Thriving Future*, the Queenstown Lakes destination management plan.

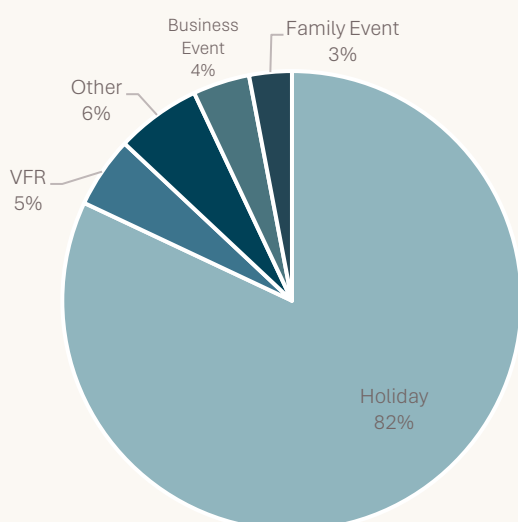
METHODOLOGY

Respondents are recruited through an on the ground field programme and through online social campaigns. To qualify respondents must have been in the region for at least 1 night and be over the age of 18. At least 1000 response will be gathered each year, and the research can be split into the domestic and international visitor markets. Summary results are updated quarterly in the [visitor insights dashboard](#) and every six months a more detailed report (this document) is published. For further information about methodology please refer to the research methodology section.

MOTIVATORS AND TRAVEL BEHAVIOURS

PURPOSE OF TRAVEL

Most visitors to Queenstown were travelling for leisure purposes a holiday or short break. Domestic travellers, especially those aged 50 and above, were more inclined to be visiting friends or family in the region than international travellers. Domestic travellers, especially South Island residents, were also more likely to be visiting to attend an event (e.g., concert or festival).



DESTINATION CONSIDERATIONS

Queenstown's stunning natural scenery is the primary attraction for international visitors and ranks among the top three motivators for domestic visitors. Relaxation and enjoying local restaurants and cafés are also significant motivators for domestic visitors. International visitors are motivated by tourism activities and attractions, the excitement of discovering a new destination, and adventure.

| | |
|-------------------------------|-----|
| Natural environment | 61% |
| Relaxation | 51% |
| Tourism activities | 48% |
| Food and beverage | 47% |
| Discovery | 42% |
| Reputation | 38% |
| Weather | 32% |
| Adventure | 31% |
| Sports and recreation | 22% |
| Safety | 22% |
| History and culture | 14% |
| Special deals | 10% |
| Social connections | 9% |
| Locals and their ways of life | 8% |

MOTIVATORS AND TRAVEL BEHAVIOURS

TRANSPORTATION

Three out of four North Island residents arrived in the Queenstown region via a domestic flight, with two thirds of them then renting a vehicle for travel within the region. Most South Island residents drove to Queenstown in their own vehicles. While Australians mostly arrived on direct trans-Tasman flights, other international visitors were more likely to arrive in a rental vehicle or on a domestic flight. International visitors were more inclined to use a tour bus or shuttle within the region compared to domestic visitors.

AROUND REGION

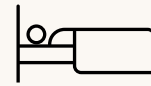
| | |
|--|-----|
| Rented vehicle (excluding campervans) | 51% |
| Walking | 42% |
| Taxi/Uber (or other ride sharing service) | 22% |
| Private vehicle (excluding campervans) | 19% |
| Tour bus | 14% |
| Public bus service (excluding airport bus) | 15% |
| Shuttle | 7% |
| Public airport bus | 7% |
| Ferry | 5% |
| Bicycle | 5% |

TO REGION

| | |
|----------------------------|-----|
| International flight | 29% |
| Domestic flight | 31% |
| Rented vehicle | 20% |
| Private vehicle | 15% |
| Public bus/shuttle service | 3% |
| Other transport | 1% |

ACCOMMODATION

Domestic visitors stayed an average of four nights in Queenstown, while international visitors stayed an average of five nights (with Australians averaging six nights and other international visitors averaging four nights). One in three international visitors split their time in the region and also stayed overnight in Wānaka. Hotels are the preferred accommodation in Queenstown, followed by rented private houses (e.g. through Airbnb, Bachcare, Holiday Houses, or similar businesses).



4

Average nights stayed (median)

| | |
|-----------------------------|-----|
| Hotel | 37% |
| Private home (rented) | 23% |
| Serviced apartment | 10% |
| Motel | 9% |
| Private home (no payment) | 6% |
| Backpackers/hostel | 7% |
| Camping ground/holiday park | 4% |
| Luxury lodge | 2% |
| B&B, Homestay or Farm stay | 1% |
| Other | 1% |

MOTIVATORS AND TRAVEL BEHAVIOURS

DISPERSAL WITHIN REGION

Arrowtown attracts a significant proportion of both domestic and international visitors, particularly Australians. Reflecting the longer stay, international visitors were more inclined to explore the wider region, travelling to Glenorchy and Wānaka.

| | |
|---------------------------------|-----|
| Queenstown Town Centre | 96% |
| Arrowtown | 67% |
| Frankton | 52% |
| Glenorchy | 34% |
| Arthur's Point | 23% |
| Gibbston Valley | 22% |
| Other Queenstown Urban Area | 20% |
| Lake Hayes | 18% |
| Kingston | 11% |
| Kelvin Heights/Kelvin Peninsula | 10% |
| Wānaka (NET) | 50% |
| Wānaka Town Centre | 44% |
| Cardrona Valley | 20% |
| Lake Hāwea | 16% |
| Glendhu Bay (and surrounds) | 4% |
| Makarora (and surrounds) | 3% |
| Luggate | 2% |

ACTIVITIES/ EXPERIENCES

Dining out, sightseeing and shopping are the top three most popular activities for visitors to Queenstown. International visitors were more likely to participate in a wider range of tourism and adventure activities compared to domestic visitors.

| | |
|------------------------------------|-----|
| Restaurants and cafes | 87% |
| Sightseeing | 68% |
| Shopping | 67% |
| Walking/ hiking | 56% |
| Lake cruising and river activities | 40% |
| Bars/nightclubs | 37% |
| Wineries or other wine experiences | 26% |
| Art, museums, historic buildings | 24% |
| Ski, snow, ice activities | 23% |
| Adrenaline activities | 20% |
| Wellness experience | 18% |
| Flying/air activities | 14% |
| Cultural or heritage experiences | 13% |
| Land activities | 12% |
| Farm, animal or nature experience | 12% |
| Community event/giving back | 11% |
| Cycling/biking | 11% |

EXPERIENTIAL MEASURES

DESTINATION VALUES

Queenstown visitors felt welcomed in the region, with an average agreement scale rating of 8.4 (out of 10) and felt a sense of connection with the natural environment in the area (average agreement rating of 8.2 out of 10). All sentiments were significantly stronger among international visitors compared to domestic visitors. Areas for focus include fostering meaningful exchanges where visitors can share their knowledge and reciprocate in a meaningful manner, empowering visitors to travel in a sustainable way, and providing opportunities for visitors to immerse themselves in the local culture and heritage.

| | Rank out of 10 |
|---|----------------|
| I felt welcome | 8.4 |
| I felt a sense of connection with the natural environment in the area | 8.2 |
| My visit included meaningful experiences/meaningful connections | 7.4 |
| I felt that locals care/cared about my wellbeing | 7.0 |
| There were opportunities for me to learn about the local culture and heritage | 6.8 |
| I felt empowered to travel in a sustainable way | 6.4 |
| I was able to share my knowledge/ reciprocate meaningfully in some way | 6.0 |

FOUR PILLARS OF WELLBEING

Across all four strategic pillars, international visitors rate the Queenstown region more favorably than domestic visitors. The pillars showing the most room for improvement, especially for domestic visitors, are those reflecting the region's commitment to the people in its community and to its culture and heritage.



8.2

Cares about its local environment



8.0

Cares about the health of its economy



7.8

Cares about its culture and heritage



7.7

Cares about the people in its community

EXPERIENTIAL MEASURES

INTERACTION/ EXPERIENCE OF REGENERATIVE/ SUSTAINABLE OFFERINGS

There is an opportunity to educate visitors about regenerative tourism and Queenstown's commitment to it. While a quarter of all visitors expressed satisfaction with the sustainable or regenerative offerings available, two in five visitors were unsure if the services or products they engaged with were sustainable or regenerative.

| | |
|--|-----|
| I don't know if the tourism offerings I purchased/ consumed were sustainable/ regenerative | 40% |
| I was satisfied with the sustainable/ regenerative tourism offerings available | 25% |
| It was important to me that the tourism offerings I purchased/ consumed were sustainable/ regenerative | 16% |
| I found it easy to find out which tourism offerings were sustainable/ regenerative | 14% |
| None of the above | 14% |
| I actively sought ways to positively contribute to the community or environment during my stay | 10% |
| I wanted to purchase more sustainable/ regenerative tourism offerings | 9% |
| I chose a tourism offering over others because of their efforts to be sustainable/ regenerative | 9% |

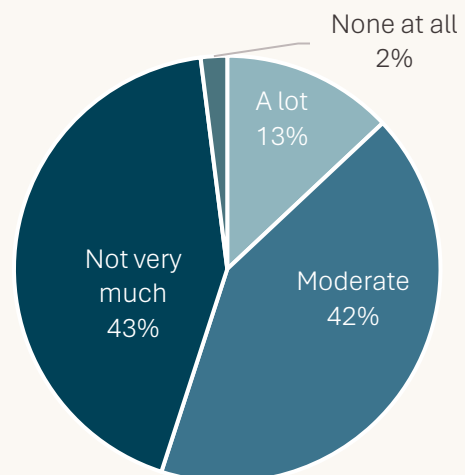
VISIT LEGACY

Regarding the legacy of their visit, international visitors are notably more inclined to believe they explored local attractions more extensively compared to other visitors.

| | |
|--|-----|
| I think I explored the local area more than others | 37% |
| I got to know and connected with a range of locals | 20% |
| I think I stayed longer than most other visitors | 18% |
| I shared some aspects of my culture with local people | 9% |
| I shared my knowledge with local people | 8% |
| I took time to care for or restore the natural environment in some way | 7% |
| Other | 2% |
| None of the above | 38% |

INTERACTION WITH LOCALS

Most visitors to Queenstown reported having at least moderate levels of interactions with locals, with those having more contact rating their overall experience higher and being more inclined to recommend Queenstown as a destination.



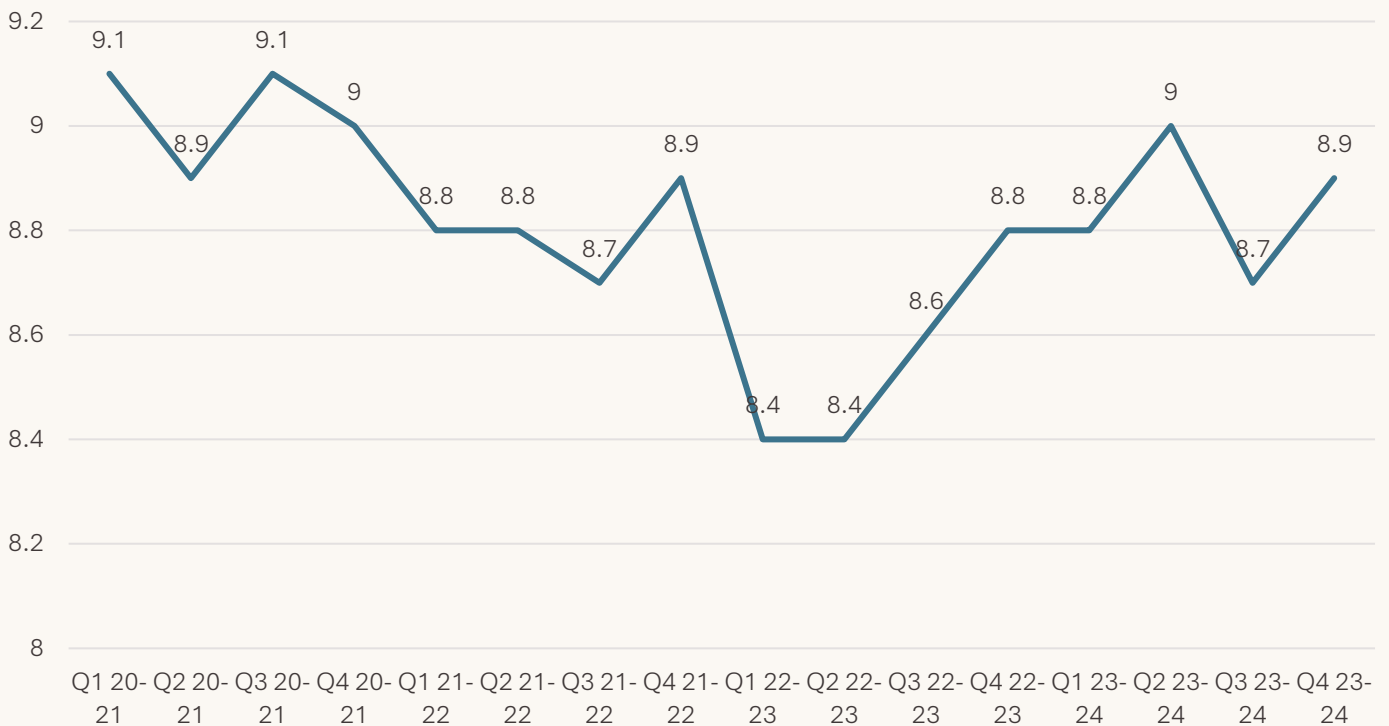
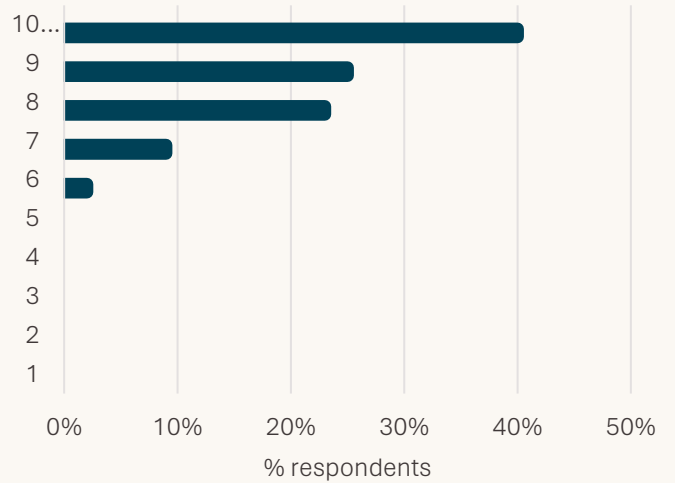
SATISFACTION MEASURES

8.9

Overall visitor experience satisfaction

OVERALL SATISFACTION

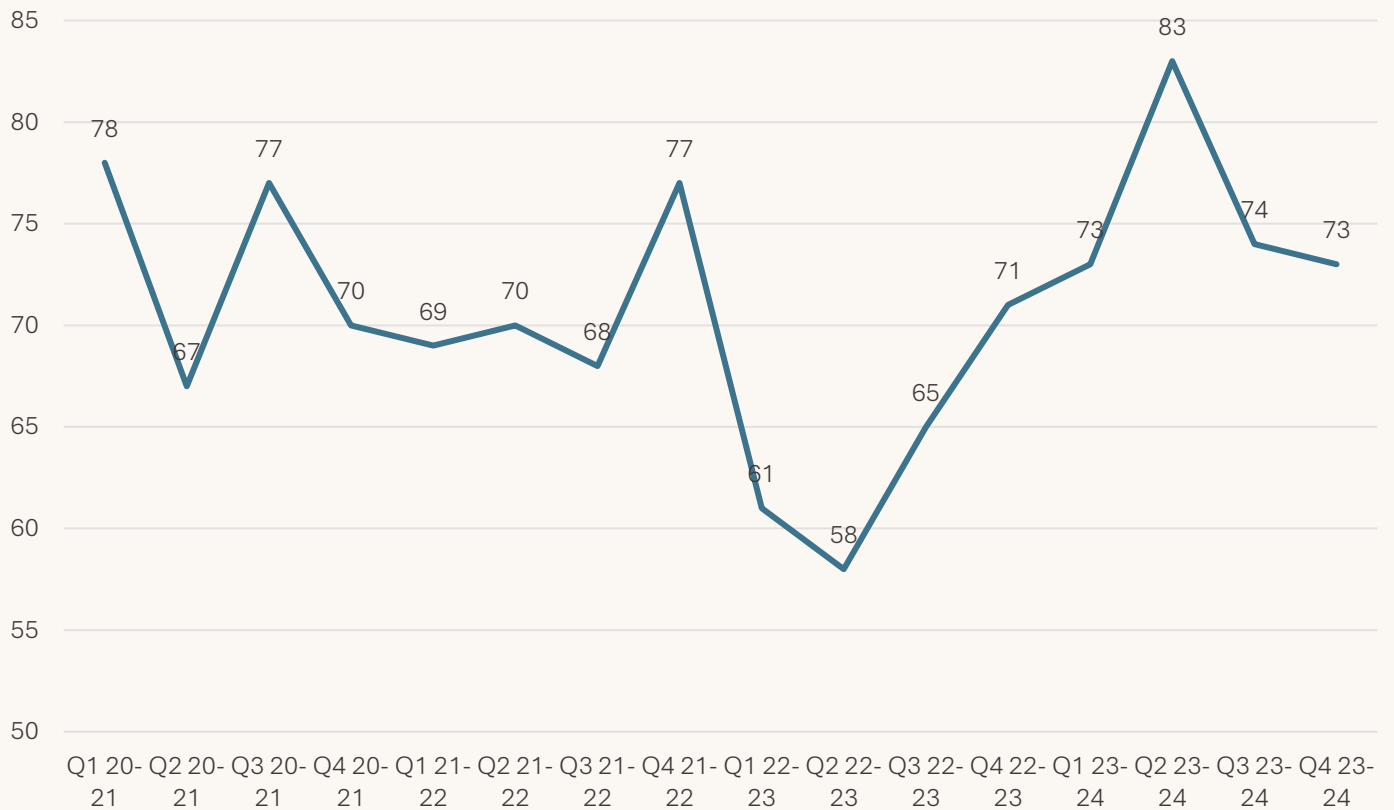
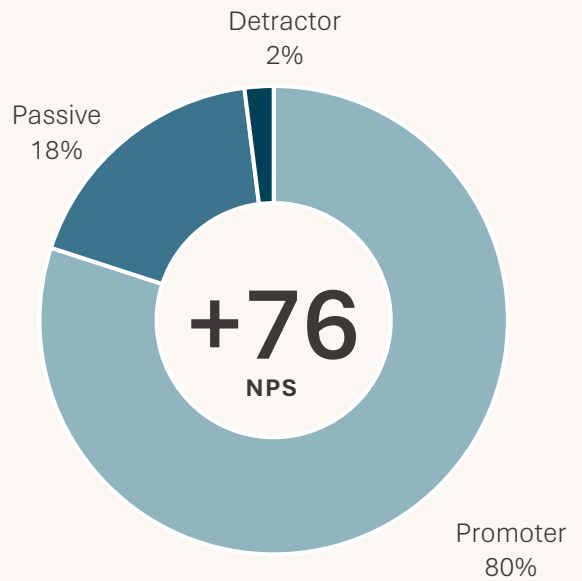
Visitors to Queenstown express high satisfaction with their experience in the region. On average, domestic visitors rate their experience at 8.6 (out of 10), while international visitors rate it higher at 9.1 (out of 10). Overall satisfaction scores are notably higher among North Island residents compared to South Island residents (8.8 vs 8.0). Overall satisfaction increases with length of stay in the region.



SATISFACTION MEASURES

NET PROMOTER SCORE

Queenstown boasts an impressive Net Promoter Score (NPS) of +76 indicating a strong advocacy for the region as a destination. International visitors exhibit an even higher NPS of +84 compared to domestic visitors at +65.



SATISFACTION MEASURES

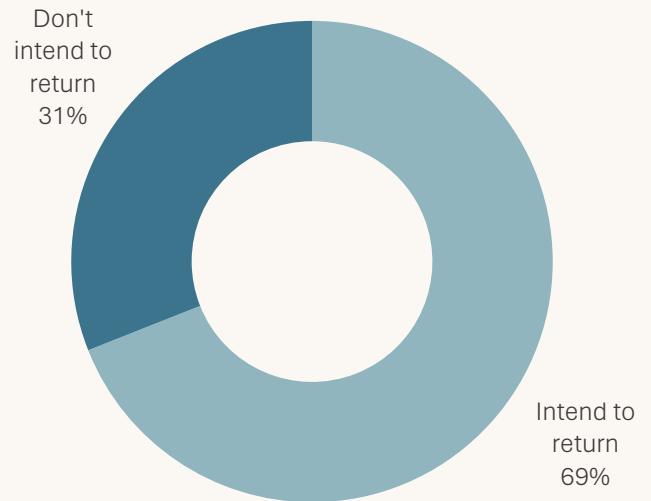
AREAS FOR IMPROVEMENT

A significant area identified for improvement is the ease of parking in the region. This issue is evident in satisfaction ratings and in comments suggesting improved traffic flow and increased parking availability as primary opportunities for improvement. Additionally, one in ten visitors expressed concerns about the cost of visiting the region, a sentiment particularly prevalent among domestic visitors.

| | |
|---|-----|
| Improve parking (availability, cost) | 14% |
| Improve traffic flow/traffic management/road access | 12% |
| Reduce cost of visiting (accommodation, food, activities) | 9% |
| Limit roadworks & construction | 8% |
| Improve public transport | 5% |
| Improve accommodation (options, cost) | 3% |
| Improve pedestrian / walking experience | 2% |
| Provide more visitor information | 2% |

INTENTION TO RETURN

Looking ahead, most domestic visitors (84%) and more than half of international visitors (56%) express intentions to return to the region within the next two years.



RESEARCH METHODOLOGY

METHODOLOGY

At least 1,000 visitors to the Queenstown-Lakes District will participate in the research over the course of a year (n=500 New Zealanders and n=500 international visitors: n=500 overnight visitors to Queenstown and n=500 overnight visitors to Wānaka).

Visitors are recruited to participate in the survey via two channels:

- In-Region Intercept: Angus & Associates recruit survey participants in the Queenstown Lakes region and by approaching visitors at designated locations. Visitors can choose to complete the survey on their own device, by email, or on a tablet provided. This approach ensures a representative sample of visitors.
- Digital Campaigns/e-newsletters: A link to the online survey is shared by DQ and LWT through social media channels and e-newsletters to target recent visitors.

To qualify to participate, respondents must be 18+ years of age, live outside of the Queenstown Lakes District, and have stayed overnight in the Queenstown or Wānaka regions within the past three months.

Following extraction, quality control and cleaning procedures, the survey data is weighted to better reflect the actual proportions of domestic and international visitors to the Queenstown and Wānaka regions (see opposite).

To incentivise participation, visitors who complete the survey are offered entry into a quarterly prize draw to win their choice of either a Lasting Legacy Pack (five native trees planted in the Queenstown/Wānaka area on their behalf with Trees that Count and a \$150 donation made in their name to Love Queenstown/Love Wānaka), or a selection of organic wines from Amisfield, shipped to their door.

The online survey is programmed and administered by Angus & Associates' affiliate company. Get Smart. The average (median) survey length is 10 minutes.

SURVEY RESPONDENT SOURCE

| | |
|----------------------------------|----------------|
| Digital Campaign | 42% |
| Destination e-newsletter | 21% |
| On-Site Field Staff | 33% |
| Other | 4% |
| Queenstown Visitor Sample | N = 656 |

DATA WEIGHTING

| | Dom. | Int. |
|-------------------------|------------|------------|
| Actual Visitors | 325 | 331 |
| | 50% | 50% |
| Weighted Visitors | 293 | 363 |
| | 45% | 55% |
| Weighting Factor | 0.9 | 1.1 |

For further questions about the visitor experience survey please reach out to [Destination Queenstown](#).

VISITOR PROFILE

DEMOGRAPHIC PROFILE

AGE

| | |
|-------------|-----|
| 18-19 years | 1% |
| 20-29 years | 19% |
| 30-39 years | 19% |
| 40-49 years | 1% |
| 50-59 years | 22% |
| 60-69 years | 15% |
| 70-79 years | 6% |

GENDER

| | |
|----------------|-----|
| Male | 40% |
| Female | 59% |
| Gender Diverse | 1% |

PRIOR VISITS TO THE REGION

| | |
|--|-----|
| This is (or was) my first visit | 40% |
| I have visited once before, or a few times | 32% |
| I have visited many times | 26% |
| I used to live in the Queenstown region | 2% |



