

QUEENSTOWN VISITOR SURVEY

2021/22 – Quarter 1 Update

SUMMARY - YEAR ENDING SEPTEMBER 2021

VISIT MOTIVATORS

Almost all domestic visitors to Queenstown are travelling for a holiday or short break. For one third of this group a visit to Queenstown is based around one specific attraction or experience – most commonly skiing/snowboarding, Skyline Queenstown, and Milford Sound.

Experiencing Queenstown's outstanding natural landscapes is what visitors most commonly want from their visit to the destination. Other important motivators are spending time with loved ones, relaxing and taking time out, new places/experiences, and undertaking tourism activities. Cantabrians are less motivated by some of these factors than other visitors.

An erosion in the prominence of many visit motivators and decision drivers is evident in Q3 2021 compared with Q3 2020. For example Queenstown's world-class reputation, Queenstown's reputation as a safe destination, and ease/convenience of access.

TRAVEL BEHAVIOUR

Domestic visitors to Queenstown are very likely to travel with a partner/spouse, and almost one in two are travelling as a couple with no other companions. Almost two thirds include another destination on their itinerary - most commonly Wānaka and Milford Sound, but one in five don't leave the Queenstown town centre/Frankton area (i.e. they don't explore the wider Queenstown region, or other regions). The average length of stay for domestic visitors is three nights, and one in four are on their first visit.

When choosing accommodation, price is the most common deciding factor but location and special offers are also commonly considered. Almost half of domestic visitors stay in a hotel. One in five Aucklanders rent a holiday house. Very few domestic visitors stay in non-commercial accommodation. Domestic flights are the most common means of getting to Queenstown (especially for Aucklanders and Wellingtonians), and a rented vehicle or walking are the most common means of getting around Queenstown.





SUMMARY - YEAR ENDING SEPTEMBER 2021

Visiting restaurants and cafes, shopping, and sightseeing are the most popular activities and experiences for domestic visitors, followed by walking/hiking and lake/river activities. Just one in five visitors participate in an adrenaline activity. Two fifths of visitors were not able to do every activity or attraction they would have liked to during their visit. Unmet potential is highest for jetboating, skiing/snowboarding, and Skyline Queenstown.

SATISFACTION WITH VISITOR EXPERIENCE

Domestic visitors are generally very satisfied with their experience in Queenstown. Ease of walking around Queenstown and ease of way finding rate highly. One area that clearly causes dissatisfaction however is ease of parking vehicles – this is notable as almost three quarters of domestic visitors use a private or rented vehicle to get around. Queenstown is also well perceived as a destination that’s safe, clean and tidy, and welcoming (all rate an average of 8.8 or above, out of ten).

At an average of 9.0 out of ten, domestic visitors’ rating of their overall experience in Queenstown is very high. Enthusiasm towards the destination is also reflected in a high Net Promoter Score (NPS) - at +70, it is 10 points higher than the NPS for New Zealand as a whole. Both measures have slipped very slightly though from the previous year end, and in Q3 2021 compared to Q3 2020. These measures should be monitored for any further shifts.





BACKGROUND & METHODOLOGY



The Queenstown Visitor Survey (QVS) helps Destination Queenstown and members better understand the profile, travel behaviour, expectations and experiences of visitors to the Queenstown region.

The QVS sample primarily includes domestic visitors (given the current COVID-19 related border restrictions). In order to be included in the sample, visitors must be 18+ and have spent at least one night in the Queenstown region (the area between Glenorchy, Cardrona, Gibbston Valley and Kingston). Respondents are recruited at key visitor sites around Queenstown, on randomly selected days each quarter. A combination of sites is used to ensure a good cross-section of visitors is included in the survey.

Visitors can provide an email address for distribution of a link to the online survey or scan a QR code to access and complete the survey on their own device at the time of intercept. A tablet is also available for visitors who wish to complete the survey at the time of intercept but don't have a suitable device on which to do so. As incentive to participate respondents are offered the chance to enter a quarterly prize draw to win a NZ\$250 Prezzy card.

N=150 responses are collected from domestic visitors each quarter, aggregating to n=600 responses per year. The current sample size attracts a margin of error of +/-8.0% on a quarterly basis and +/-3.9% on an annual basis.

Following are the latest findings in an ongoing series of quarterly updates. Responses are from visitors to Queenstown during October 2020 to September 2021. As the sample grows further analysis will be possible, including any seasonal patterns and trends over time.



PURPOSE OF TRAVEL

Firstly, what is/was the main purpose of your visit to Queenstown?
 [Of holiday/short break visitors] Was there one specific attraction or experience that your visit to Queenstown is/was based around?
 [Of holiday/short break visitors] What is/was that attraction or experience?

Purpose of Travel	
Holiday/vacation or short break	90%
Visit family or friends	3%
To attend a conference, convention, or other business event	1%
For other business reasons	1%
To attend an event held by friends or family	1%
To attend an event held by someone else	1%
To make a transport connection/just passing through on way to somewhere else	1%
For education/study	0.2%
Other	2%
Base: Total Sample Oct 20 - Sep 21	n=633

➔ **32%** of visitors on holiday/vacation or a short break travelled to Queenstown to see/do a specific attraction or experience, which included....



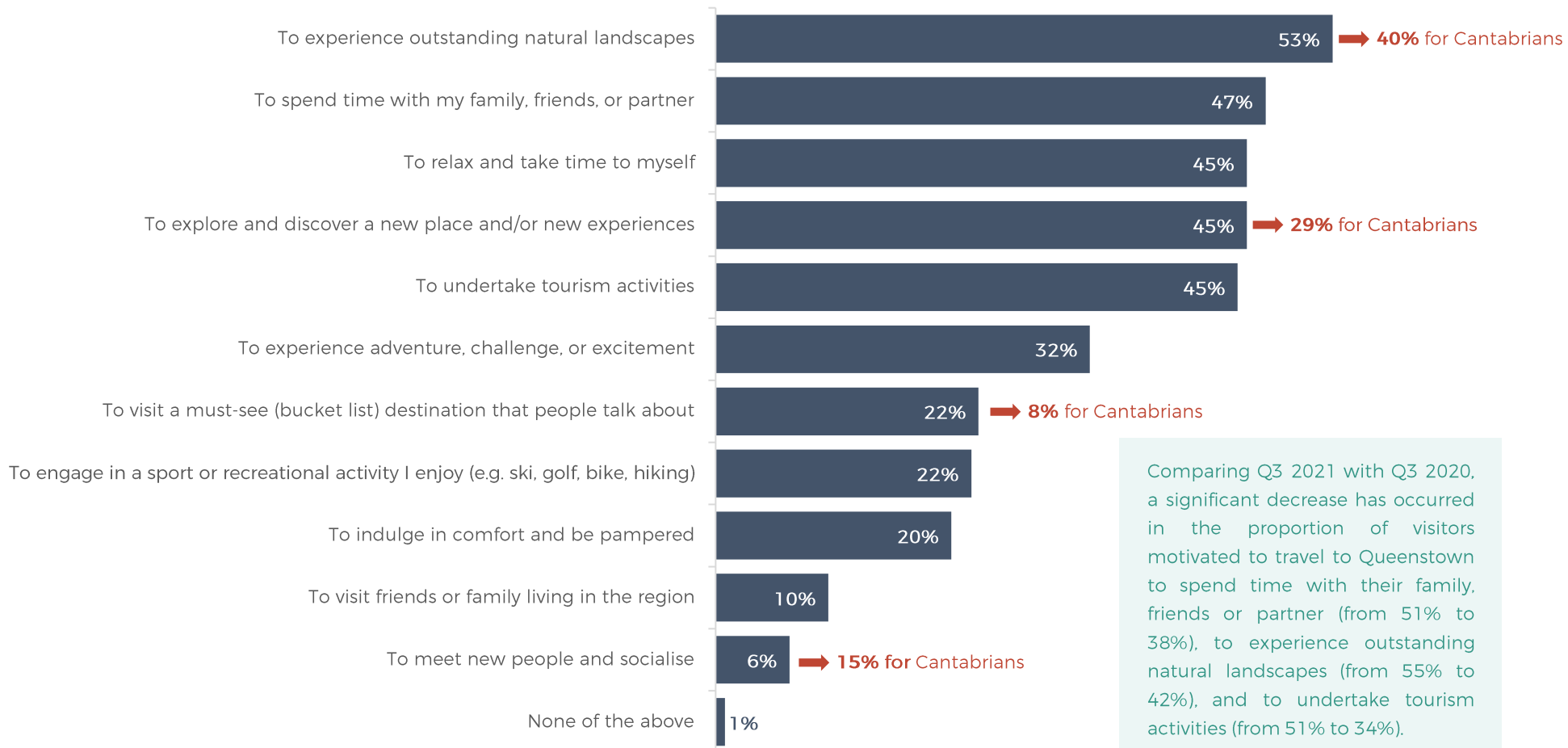
Only 22% of Cantabrians who visited for a holiday/vacation or short break, travelled to Qtown to see/do a specific attraction or experience.

In Q3 2021, 37% of holiday visitors based their visit to Queenstown around a specific attraction or experience, up from 27% in Q3 2020. The most commonly mentioned 'driver' attractions/experiences in Q3 2021 were skiing, snowboarding, The Remarkables and Milford Sound.



VISIT MOTIVATORS

And which, if any, of the following do/did you want from your visit to Queenstown?

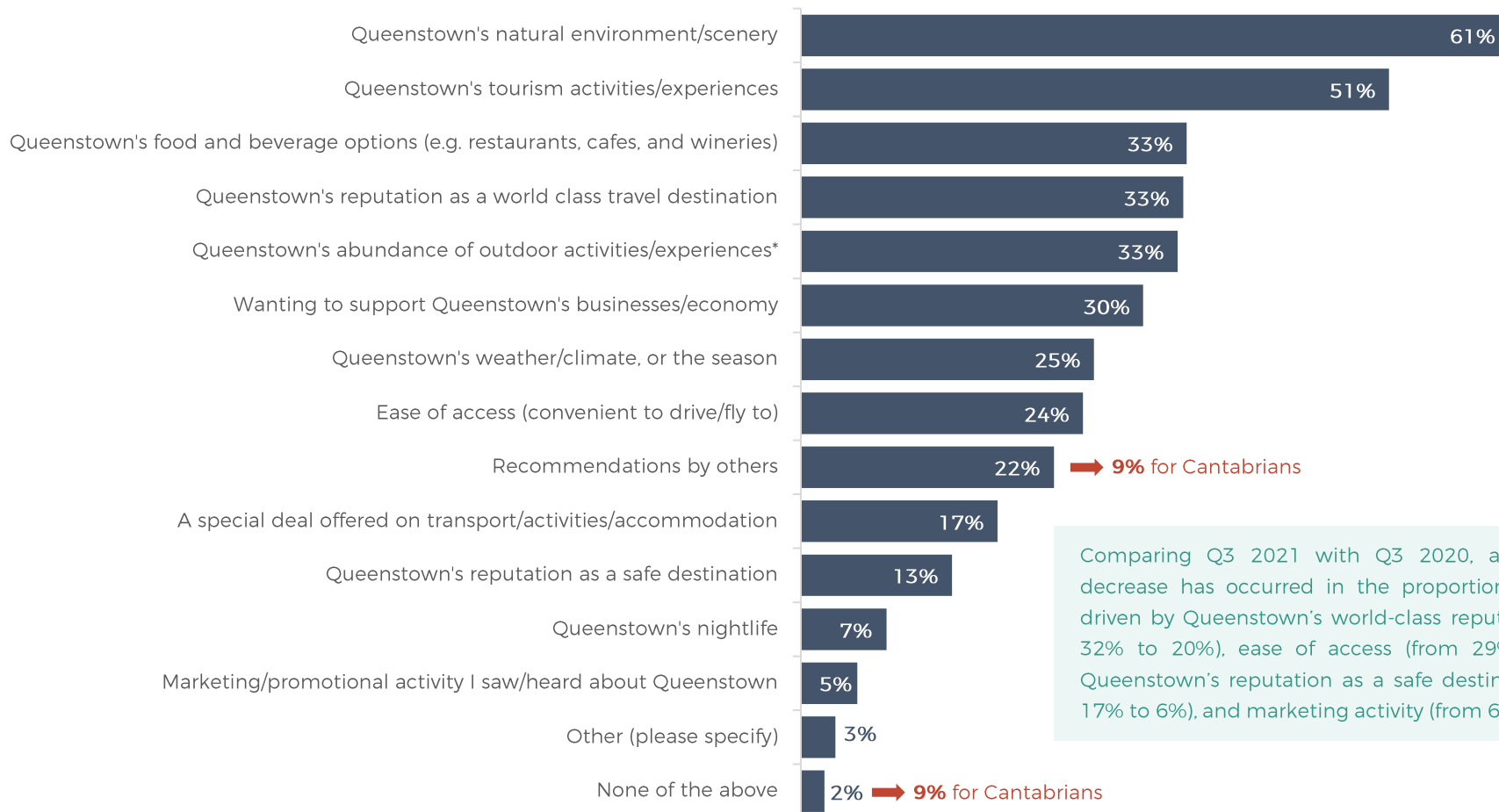


Comparing Q3 2021 with Q3 2020, a significant decrease has occurred in the proportion of visitors motivated to travel to Queenstown to spend time with their family, friends or partner (from 51% to 38%), to experience outstanding natural landscapes (from 55% to 42%), and to undertake tourism activities (from 51% to 34%).



DESTINATION DECISION DRIVERS

Which, if any, of the following were also important in your decision to visit Queenstown?



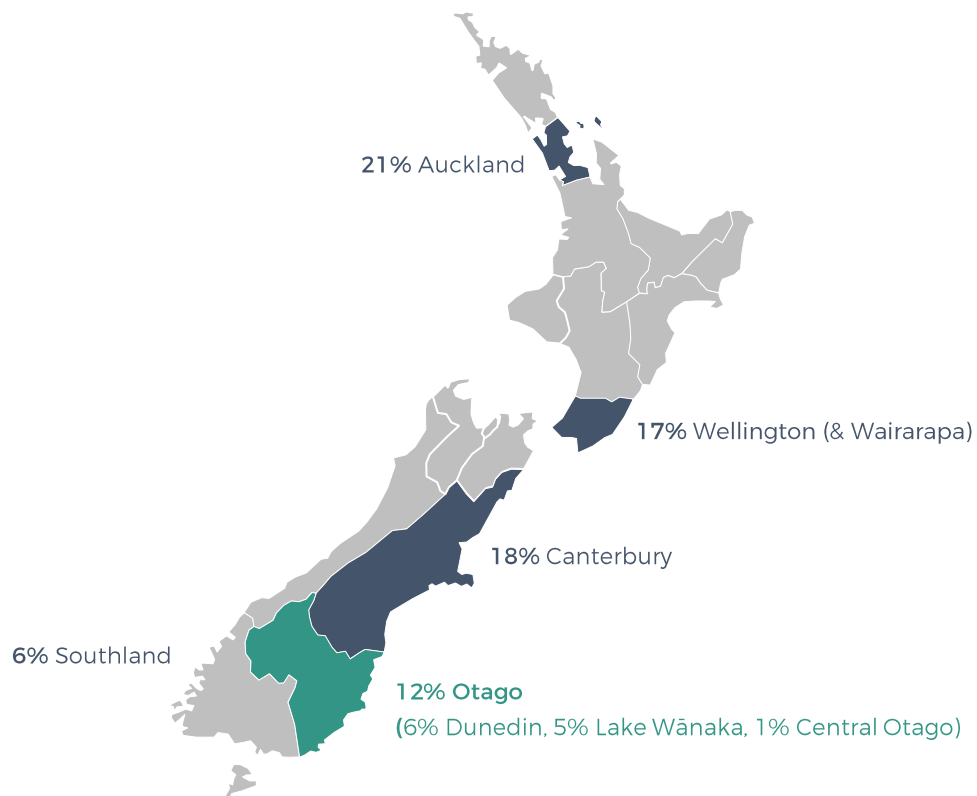
Comparing Q3 2021 with Q3 2020, a significant decrease has occurred in the proportion of visitors driven by Queenstown's world-class reputation (from 32% to 20%), ease of access (from 29% to 18%), Queenstown's reputation as a safe destination (from 17% to 6%), and marketing activity (from 6% to 1%).



DESTINATION EXPERIENCE & DISPERSAL/FLOWS

On your current (or most recent) trip to Queenstown, what location/region did you last stay overnight in before arriving in Queenstown?*

73% of visitors travelled to Queenstown directly from their region of residence



Location last stayed overnight before Queenstown (top 15)

Auckland	21%
Wellington	16%
Christchurch	11%
Bay of Plenty (excl. Rotorua)	7%
Canterbury (excl. Christchurch)	6%
Southland	6%
Dunedin	6%
Hamilton/Waikato (excl. Taupō & The Coromandel)	5%
Lake Wānaka	5%
Hawke's Bay	3%
Northland	2%
Taranaki	2%
Nelson	2%
The Coromandel	1%
Whanganui	1%
Base: Total Sample Jul - Sep 21	n=159

* Added Q3 2021

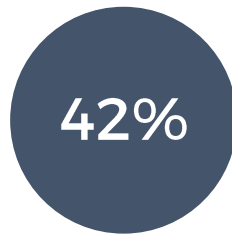


DESTINATION EXPERIENCE

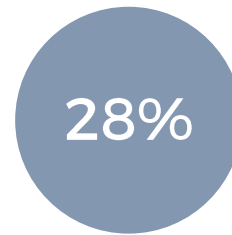
How many times have you visited Queenstown?



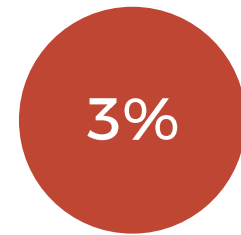
First visit
to Queenstown



Visited
once/few times



Visited
many times



Used to live
in Queenstown



In Q3 2021, a lower proportion of visitors were visiting for the first time (18%) vs Q3 2020 (27%).
Cantabrians are also more likely to have visited many times (46%).



DISPERSAL/FLOWS

How many times have you visited Queenstown?
 What locations have you visited, or did you visit, on your trip to Queenstown?
 And what New Zealand locations outside of Queenstown have you visited, did you visit, or do you intend to visit, as part of your trip?

Dispersion within Queenstown region	
Queenstown town centre	90%
Frankton ¹	52%
Arrowtown	61%
Cardrona	27%
Glenorchy	25%
Lake Hayes	24%
Gibbston Valley	20%
Arthur's Point ²	15%
Kingston	12%
Kelvin Heights/Kelvin Peninsula	10%
Other Queenstown urban area ²	3%
Other	6%
Base: Total Sample Oct 20 – Sep 21	n=633

Comparing Q3 2021 with Q3 2020, fewer visitors visited Arrowtown (45% from 66%), Glenorchy (16% from 29%), Gibbston Valley (12% from 27%) and Kingston (4% from 13%).

Other regions visited	
None – Queenstown region only	37%
Wānaka	41%
Milford Sound	27%
Other location(s) in Fiordland outside of Milford Sound (incl. Te Anau)	17%
Canterbury (including Christchurch)	16%
Other location(s) in Otago outside of Queenstown and Wānaka (incl. Dunedin)	14%
Southland (including Invercargill)	12%
West Coast	9%
Other South Island region(s)	11%
North Island region(s)	5%
Base: Total Sample Oct 20 – Sep 21	n=633

21%

Only visit the town centre/Frankton area

(17% AKL, 32% CAN, 27% WLG residents)

37%

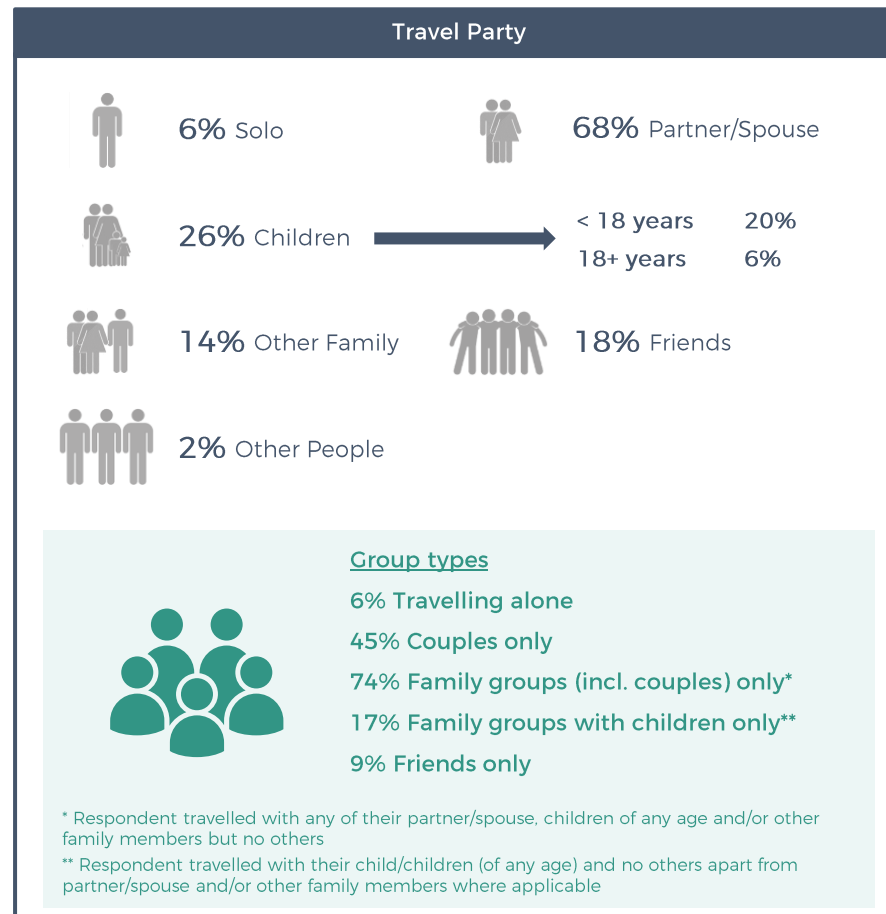
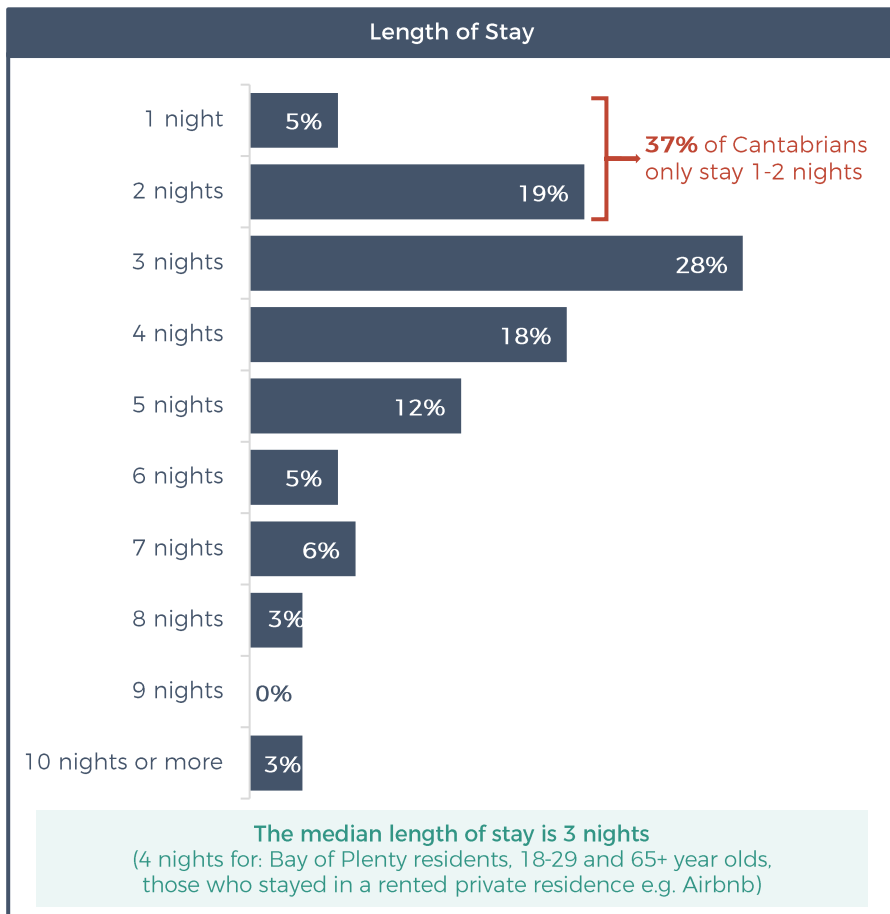
Only visit the Queenstown region

(32% AKL, 49% CAN, 39% WLG residents)



LENGTH OF STAY / TRAVEL COMPANIONS

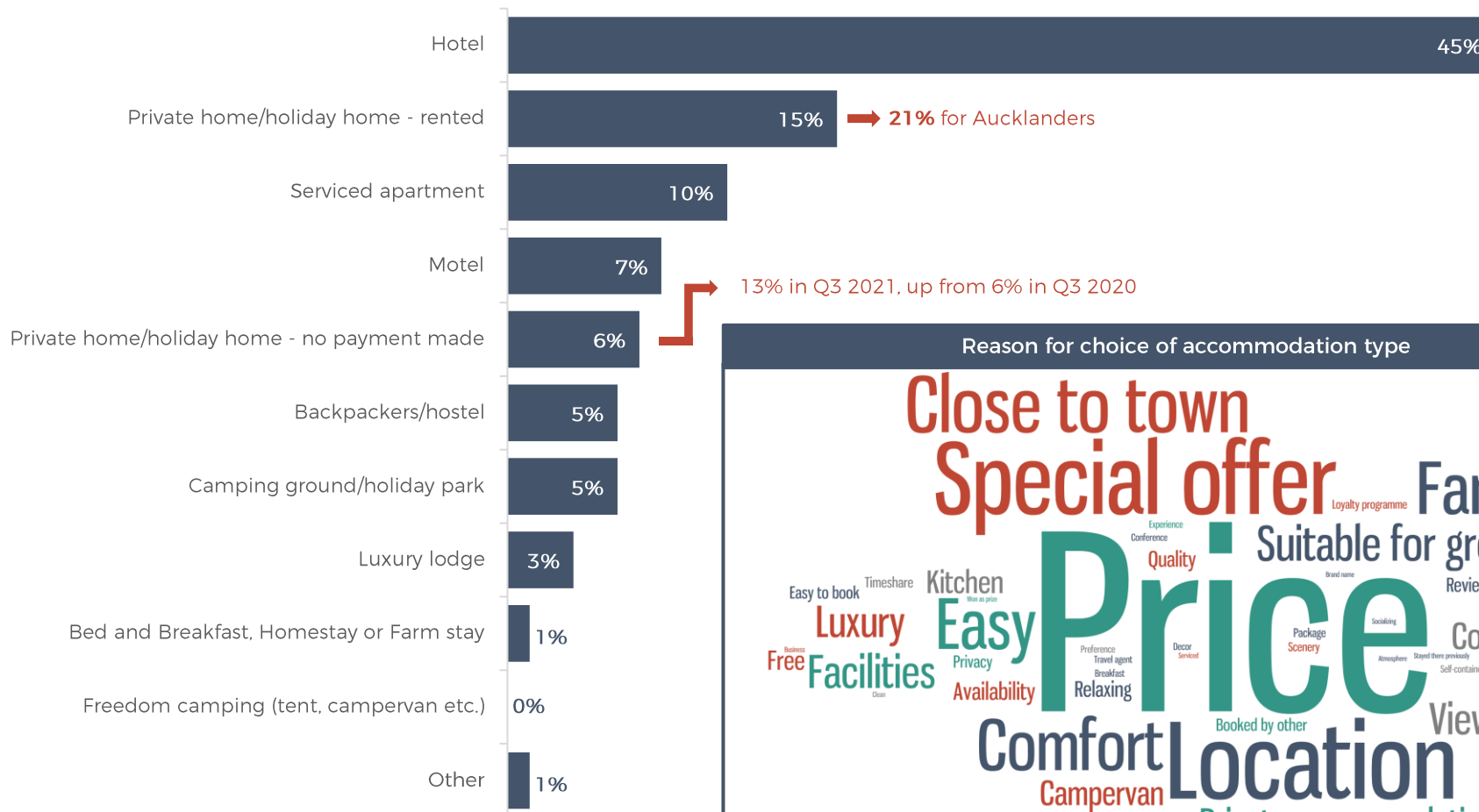
How many nights in total do you intend to stay, or did you stay, in Queenstown?
Who travelled/is travelling with you?





ACCOMMODATION

What is/was the main type of accommodation you used on this trip to Queenstown?
 What was the main reason you chose this type of accommodation?





ACCOMMODATION CONT.

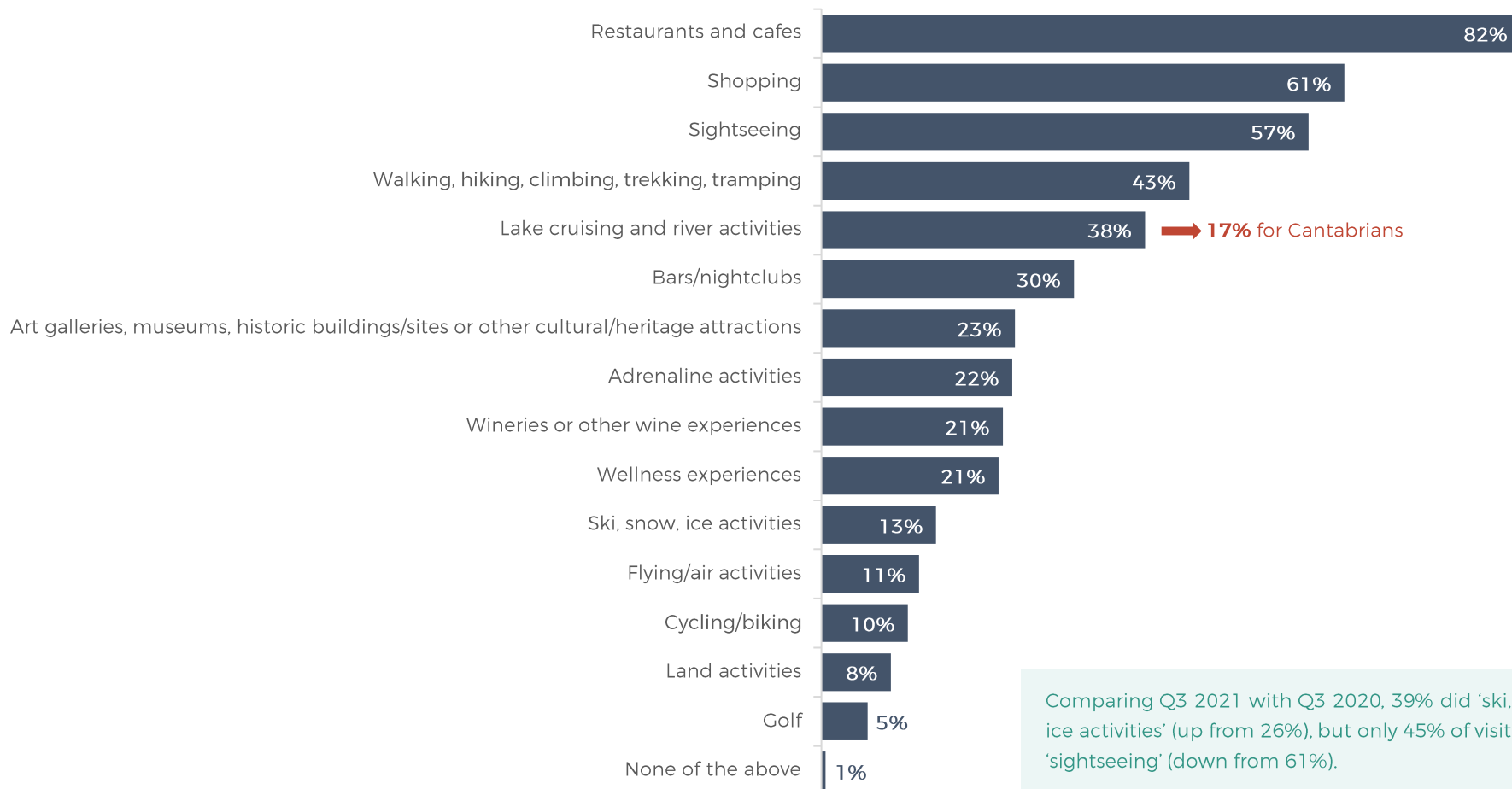
What was the main reason you chose this type of accommodation?





ACTIVITIES/EXPERIENCES

Which of the following have you done, or did you do, while in Queenstown? (on this trip)



Comparing Q3 2021 with Q3 2020, 39% did 'ski, snow or ice activities' (up from 26%), but only 45% of visitors went 'sightseeing' (down from 61%).



ACTIVITIES/EXPERIENCES – UNMET POTENTIAL

What other Queenstown activities and attractions, if any, would you have liked to visit/experience but haven't or didn't? (and why?)

40% of visitors mentioned a Queenstown activity/attraction they weren't able to visit/experience, but would have liked to

Queenstown Activities/Experiences – Unmet Potential	
Jetboating (including Shotover Jet and Hydro Attack)	13%
Skiing and snowboarding	12%
Skyline Queenstown (including gondola and luge)	11%
Milford Sound	7%
Scenic flights (including helicopters)	7%
Lake Cruise (including the TSS Earnslaw)	7%
Wineries, breweries and alcohol tasting	6%
Bungy jumping	6%
Cardrona, The Remarkables Coronet Peak	5%
Skydiving	5%
Hiking and walking	5%
Biking/cycling	4%
Other locations (including Glenorchy, Arrowtown & Wānaka)	3%
Onsen Hot Pools	3%
Paragliding	2%
Base: Didn't experience an activity/attraction they wanted to	n=254

"Skydiving. No appropriate time booking available."

"Had booked a scenic flight to Milford Sound and Earnslaw Burn helicopter but both were cancelled due to bad weather all week"

"Go up ski field, weather on the day was windy. Many attractions are not budget friendly."

"Ice bar, we ran out of time. Skiing, lack of preparation."

"Bungy etc or skiing but too expensive for 6 people"

"Glenorchy due to weather conditions"

"Jacks Point golf course - it was closed"

"Would have liked to visit Glenorchy and Cromwell but limited or no bus services"

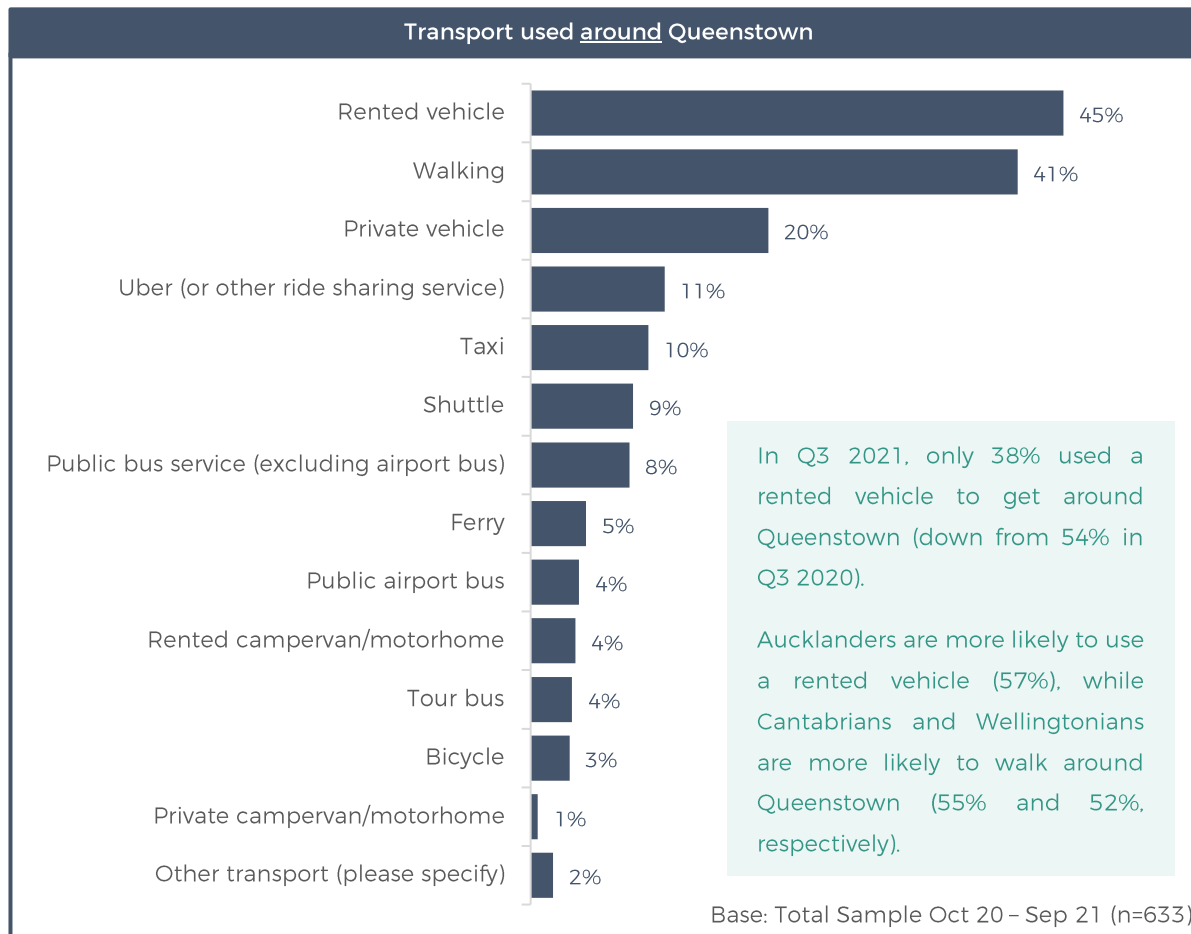


TRANSPORT

How did you get to Queenstown?
 What transport have you used (or did you use) for getting around Queenstown?

Transport used <u>to</u> Queenstown	%
Scheduled domestic flight	65%
Private vehicle	20%
Rented vehicle	14%
Scheduled bus/shuttle service	1%
Other transport	0%
Base: Total Sample Oct 20 – Sep 21 n=633	

74% of Aucklanders, 80% of Wellingtonians and 31% of Cantabrians travelled to Queenstown on a domestic flight.





TRANSPORT SATISFACTION

On a scale of 0 (not at all satisfied) to 10 (extremely satisfied), how satisfied are you with these aspects of transport in Queenstown?
(some options display only if transport type used)

Oct 2020 – Sep 2021	n=	Average	Not at all satisfied										Extremely Satisfied		N/A
			(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)		
Ease of walking around Queenstown	633	9.0	0%	0%	0%	0%	1%	2%	3%	6%	17%	16%	53%	1%	
Ease of cycling around Queenstown *	21	8.9	0%	0%	0%	0%	0%	0%	10%	10%	10%	19%	48%	5%	
Ease of finding your way around	633	8.8	0%	0%	0%	0%	1%	3%	3%	8%	21%	18%	44%	1%	
Queenstown Airport passenger facilities	414	8.6	0%	0%	0%	1%	1%	3%	4%	10%	18%	19%	40%	3%	
Ease of getting information about transport options	633	8.3	0%	0%	0%	0%	1%	4%	4%	9%	14%	9%	26%	31%	
Ease of using public transport around Queenstown	633	7.9	0%	0%	0%	1%	2%	5%	3%	3%	6%	5%	17%	56%	
Ease of driving around Queenstown	439	7.7	0%	0%	1%	2%	4%	8%	8%	14%	18%	14%	26%	3%	
Ease of parking your vehicle	439	5.7	4%	4%	10%	9%	6%	14%	10%	10%	9%	8%	13%	4%	

* Caution low sample size

Cantabrians (who are more likely to use a private vehicle to get around Queenstown), experience lower satisfaction with the ease of driving around Queenstown (6.8) and ease of parking (4.6).



QUALITY OF VISITOR EXPERIENCE

To what extent do you agree or disagree with the following statements?

		Strongly Disagree										Strongly Agree
	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
I feel/felt safe in Queenstown	9.1	0%	0%	0%	0%	0%	2%	1%	5%	21%	19%	52%
I feel/felt welcome in Queenstown	8.8	0%	0%	0%	0%	0%	4%	1%	10%	21%	18%	45%
Queenstown town centre/urban area is clean and tidy	8.8	0%	0%	0%	0%	1%	3%	3%	9%	21%	20%	43%
I don't/didn't feel concerned about anti-social behaviour in Queenstown	8.6	0%	0%	0%	1%	0%	6%	3%	7%	20%	21%	40%
Queenstown is managing tourism activity well	8.5	0%	0%	0%	1%	0%	5%	3%	13%	21%	20%	36%
It is easy to get around Queenstown	8.5	0%	0%	0%	1%	1%	5%	4%	12%	21%	16%	40%
Queenstown cares about the environment	8.4	0%	0%	0%	1%	1%	8%	3%	12%	21%	18%	37%
It is easy to interact with local people in Queenstown	8.3	0%	0%	0%	1%	1%	11%	4%	8%	19%	17%	38%
Base: Total Sample Oct 20 – Sep 21	n=633											



DESTINATION SATISFACTION

On a scale of 0 (not at all satisfied) to 10 (extremely satisfied), how satisfied are you with these aspects of your visit to Queenstown?

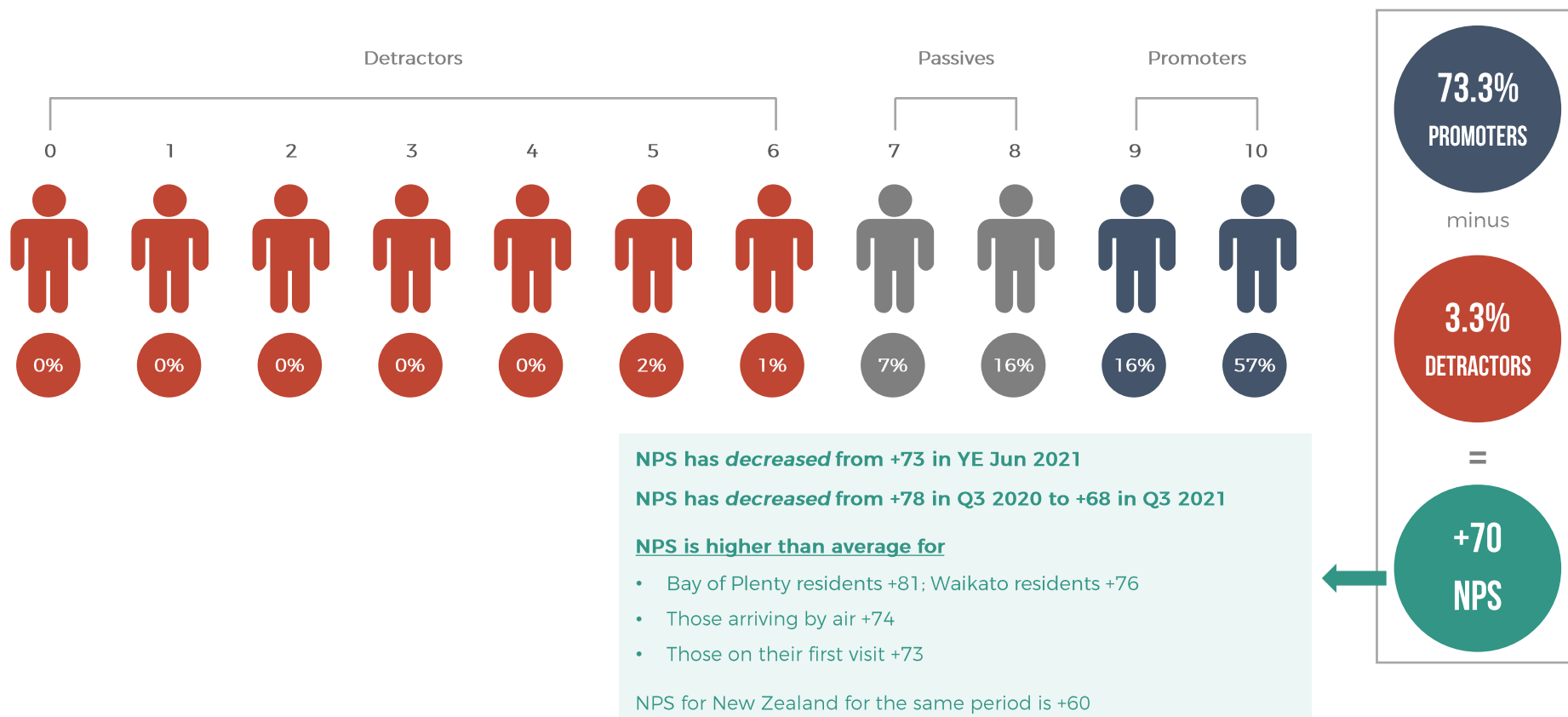
	Average	Not at all satisfied										Extremely Satisfied		N/A
		(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)		
The level of customer service experienced	8.8	0%	0%	0%	0%	0%	3%	3%	9%	22%	22%	39%	2%	
Availability of clean public toilets	8.5	0%	0%	0%	1%	1%	3%	5%	11%	18%	14%	32%	15%	
Availability of rubbish bins	8.4	0%	0%	0%	1%	2%	4%	5%	10%	22%	16%	36%	4%	
Availability of recycling bins	8.1	0%	0%	1%	1%	2%	6%	5%	12%	18%	13%	32%	9%	
Availability of Wi-Fi in public areas	7.8	0%	0%	1%	2%	2%	5%	5%	10%	12%	10%	20%	34%	
The value for money I experienced	7.3	1%	1%	1%	3%	4%	10%	11%	18%	19%	10%	21%	2%	
Overall experience in Queenstown	9.0	0%	0%	0%	0%	0%	1%	2%	6%	21%	23%	45%	1%	
Base: Total Sample Oct 20 – Sep 21	n=633													



NET PROMOTER SCORE (NPS)

How likely are you to recommend Queenstown as a visitor destination to other people?

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. Any 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.



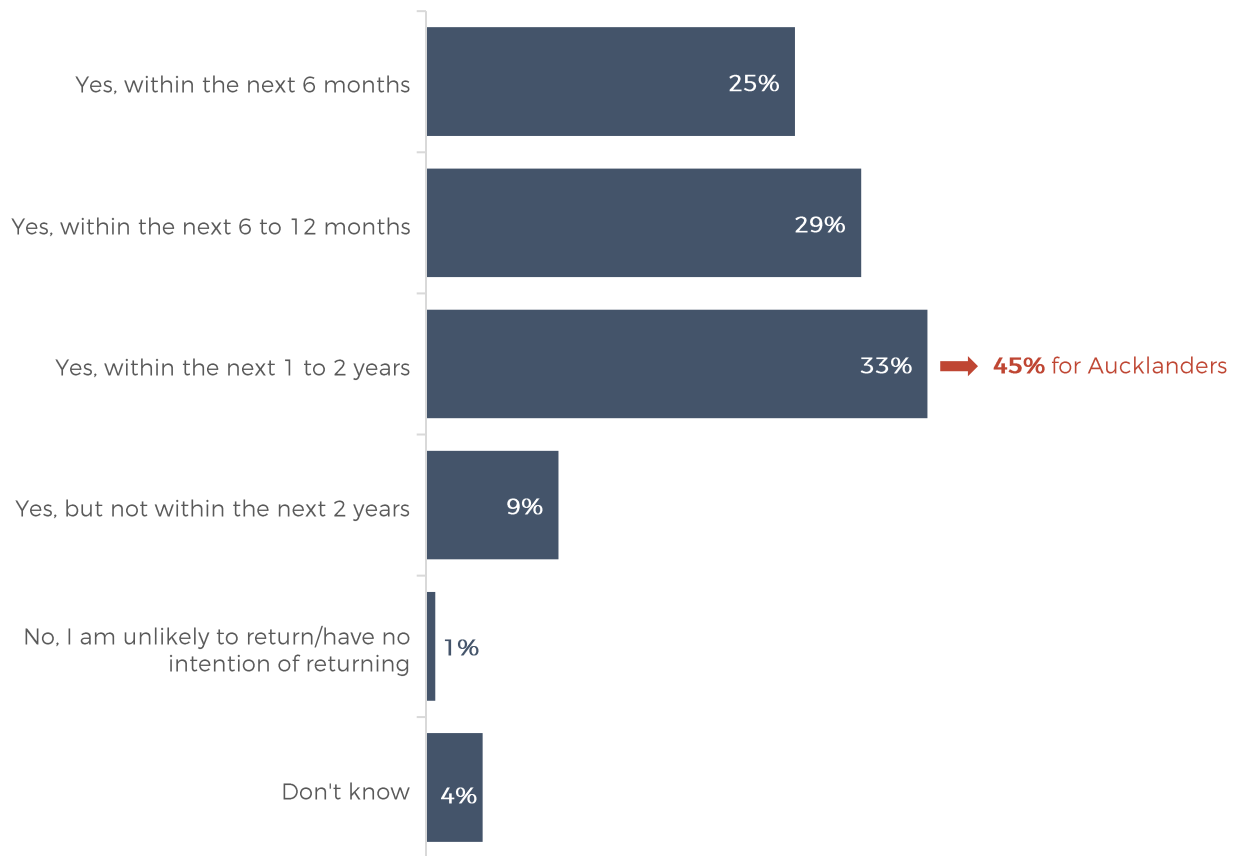


INTENTION TO RETURN

And do you think you will return to Queenstown in future?*



87% of visitors are
intending to return to
Queenstown in the next
two years





OPPORTUNITIES FOR IMPROVEMENT

What one main thing, if anything, could have improved your Queenstown experience?

Opportunities for Improvement	
Pricing	10%
Car parking	9%
Traffic congestion and road works	5%
Weather	3%
Having more time in Queenstown	2%
Provision of visitor information and signage	2%
Bad service and unfriendly locals	1%
Rubbish and recycling facilities	1%
Presentation of Queenstown	1%
Base: Total Sample Oct 20 – Sep 21	n=633

"More off-street parking places. Construction sites around city centre makes the city a little bit untidy"

"More rubbish bins, less roadworks"

"More parking and pull off areas on main roadside"

"I have always loved Queenstown, but the customer service we experienced on this trip was SHOCKING. We were locals for many years and have supported this economy during trying times, however we were treated like another 'number through the door' and I felt like I was just a business transaction, not a person."

"More car parking. Couldn't leave our parking space due to not having one when we return. Removing the main carpark was a backwards step! Businesses are struggling and anti-tourist protocols are not recommended at this time."

"We did find dining out expensive and the lack of staff made service compromising."

"I have noticed fewer people wearing masks walking the streets here. More signage encouraging mask wearing would be good."

"More environmental effort considering the impacts of adventure sports"



HIGHLIGHTS

And what, if anything, are you enjoying, or did you enjoy most about your time in Queenstown?

Highlights	
Queenstown's natural environment and scenery	27%
Food and wine experiences	11%
Relaxing and quiet experiences	6%
Great service and friendly locals	4%
Weather	3%
Atmosphere and vibe of Queenstown	3%
Walking and hiking	3%
Variety of attractions and sites	3%
Skyline (including gondola & luge)	2%
Ease of accessibility (e.g. getting around)	2%
Spending time with family	2%
Beautiful and clean township	2%
Skiing and snowboarding	2%
Wineries (& wine generally)	1%
Helicopter tour	1%
Cruising (e.g. lake cruise)	1%
Jetboating	1%
Base: Total Sample Oct 20 – Sep 21	n=633

"All the tourism activities and things to do. Helpfulness of those in the hospitality industry."

The scenery and the view from the top of the gondola"

"The people, how easy it was to get around and Coronet Peak skiing was amazing. Views and scenery outstanding, delicious food and drink options"

"Visiting friends, helicoptering up a mountain and eating good food to celebrate our wedding"

"Overall atmosphere (in large part due to the scenery and climate) and fine dining (including our tendency to spend a little more on ourselves than we would at home) always make our trips to Queenstown feel like a special break from normal life."

"Experience up the skyline and walking around the lake were beautiful"

"The kindness of people as I was stuck in lockdown"

"Spending quality time with my friends and family enjoying new experiences"

"The beautiful style of the township and surrounding view"



SAMPLE PROFILE (NEW ZEALAND RESIDENTS)

Country of birth	
New Zealand	66%
Other country	44%
Region of residence	
Northland	2%
Auckland	36%
Waikato	10%
Bay of Plenty	9%
Gisborne	1%
Hawke's Bay	3%
Taranaki	1%
Manawatu-Whanganui	3%
Wellington (& Wairarapa)	16%
Tasman	1%
Nelson	1%
Marlborough	0%
West Coast	0%
Canterbury	10%
Otago	4%
Southland	3%
Base: Total Sample Oct 20 - Sep 21 n=633	

Gender	
Male	48%
Female	52%
Gender Diverse	0%
Prefer not to say	0%
Age	
18-19 years	2%
20-24 years	9%
25-29 years	17%
30-34 years	13%
35-39 years	7%
40-44 years	11%
45-49 years	11%
50-54 years	11%
55-59 years	5%
60-64 years	6%
65-69 years	3%
70-74 years	3%
75+ years	1%
Base: Total Sample Oct 20 - Sep 21 n=633	

