

# VISITOR EXPERIENCE SURVEY RESULTS

Queenstown  
YE December 2023



**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.

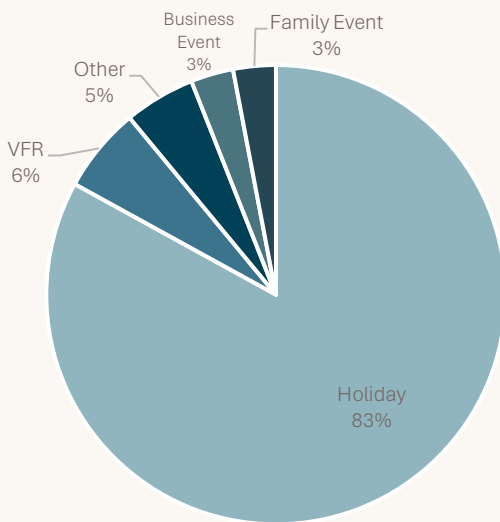
## **METHODOLOGY**

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 likely to be visiting friends or family in the region.



## DESTINATION CONSIDERATIONS

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

Natural environment	62%
Food and beverage	50%
Tourism activities	48%
Discovery	42%
Reputation	40%
Weather	37%
Adventure	33%
Safety	26%
Sports and recreation	26%
History and culture	16%
Special deals	11%
Social connections	9%
Low-impact/Convenient location	8%
Locals and their ways of life	7%

# MOTIVATORS AND TRAVEL BEHAVIOURS

## TRANSPORTATION

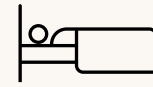
Three out of four North Island residents arrived in the Queenstown region via a domestic flight, with two thirds of them then renting a vehicle for travel within the region. Most South Island residents drove to Queenstown in their own vehicles. While Australians mostly arrived on direct trans-Tasman 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.

Rented vehicle (excluding campervans)	54%
Walking	42%
Taxi/Uber (or other ride sharing service)	24%
Private vehicle (excluding campervans)	20%
Tour bus	16%
Public bus service (excluding airport bus)	14%
Shuttle	9%
Public airport bus	7%
Ferry	5%
Bicycle	3%
Campervan/motorhome	2%

International flight	35%
Domestic flight	30%
Rented vehicle	18%
Private vehicle	12%
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 six nights. Hotels are the preferred accommodation in Queenstown, followed by rented private houses.



# 5

Average nights stayed (median)

Hotel	36%
Private home (rented)	22%
Serviced apartment	12%
Motel	9%
Private home (no payment)	7%
Backpackers/hostel	6%
Camping ground/holiday park	4%
Luxury lodge	3%
B&B, Homestay or Farm stay	0%
Freedom camping	0%

# MOTIVATORS AND TRAVEL BEHAVIOURS

## DISPERSAL WITHIN REGION

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

Queenstown Town Centre	96%
Arrowtown	69%
Frankton	56%
Glenorchy	35%
Arthur's Point	25%
Other Queenstown Urban Area	23%
Gibbston Valley	20%
Lake Hayes	20%
Kingston	11%
Kelvin Heights/Kelvin Peninsula	10%
Wānaka (NET)	50%
Glendhu Bay (and surrounds)	49%
Wānaka Town Centre	44%
Cardrona Valley	23%
Lake Hāwea	15%
Makarora (and surrounds)	3%
Luggate	2%

## ACTIVITIES/ EXPERIENCES

Dining out, shopping and sightseeing are the top three most popular activities. International visitors were more likely to participate in a wider range of adventure and adrenaline-fueled activities compared to domestic visitors. Almost half of all visitors between July-September went skiing, or participated in other snow/ice activities, while in the region.

Restaurants and cafes	89%
Shopping	71%
Sightseeing	71%
Walking/ hiking	52%
Lake cruising and river activities	42%
Bars/nightclubs	39%
Ski, snow, ice activities	38%
Wineries or other wine experiences	25%
Art, museums, historic buildings	24%
Adrenaline activities	23%
Wellness experience	22%
Land activities	15%
Flying/air activities	13%
Farm, animal or nature experience	13%
Community event/giving back	12%
Cultural or heritage experiences	12%
Cycling/biking	9%

# EXPERIENTIAL MEASURES

## DESTINATION VALUES

Visitors felt welcomed in the region, with an average agreement scale rating of 8.4 (out of 10) and sensed that locals cared for their well-being (average agreement rating of 8.2 out of 10). These sentiments were significantly stronger among international visitors compared to domestic visitors.

Areas for focus include enhancing opportunities for visitors to immerse themselves in the local culture and heritage, as well as fostering meaningful exchanges where visitors can share their knowledge and reciprocate in a meaningful manner.

	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	6.2
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, a larger segment was unsure if the services or products they engaged with were sustainable or regenerative.

I specifically looked for sustainable/ regenerative tourism offerings	5%
I found it easy to find out which tourism offerings were sustainable/ regenerative	13%
I wanted to purchase more sustainable/ regenerative tourism offerings	10%
I don't know if the tourism offerings I purchased/ consumed were sustainable/ regenerative	44%
It was important to me that the tourism offerings I purchased/ consumed were sustainable/ regenerative	16%
I chose a tourism offering over others because of their efforts to be sustainable/ regenerative	10%
I was satisfied with the sustainable/ regenerative tourism offerings available	26%
I actively sought ways to positively contribute to the community or environment during my stay	11%

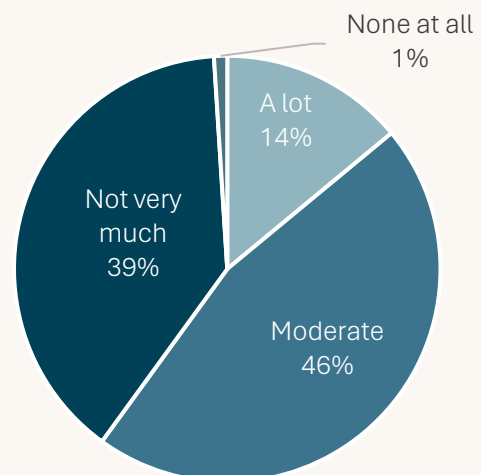
## VISIT LEGACY

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	38%
I got to know and connected with a range of locals	23%
I think I stayed longer than most other visitors	19%
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	8%
Other	2%
None of the above	36%

## 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.



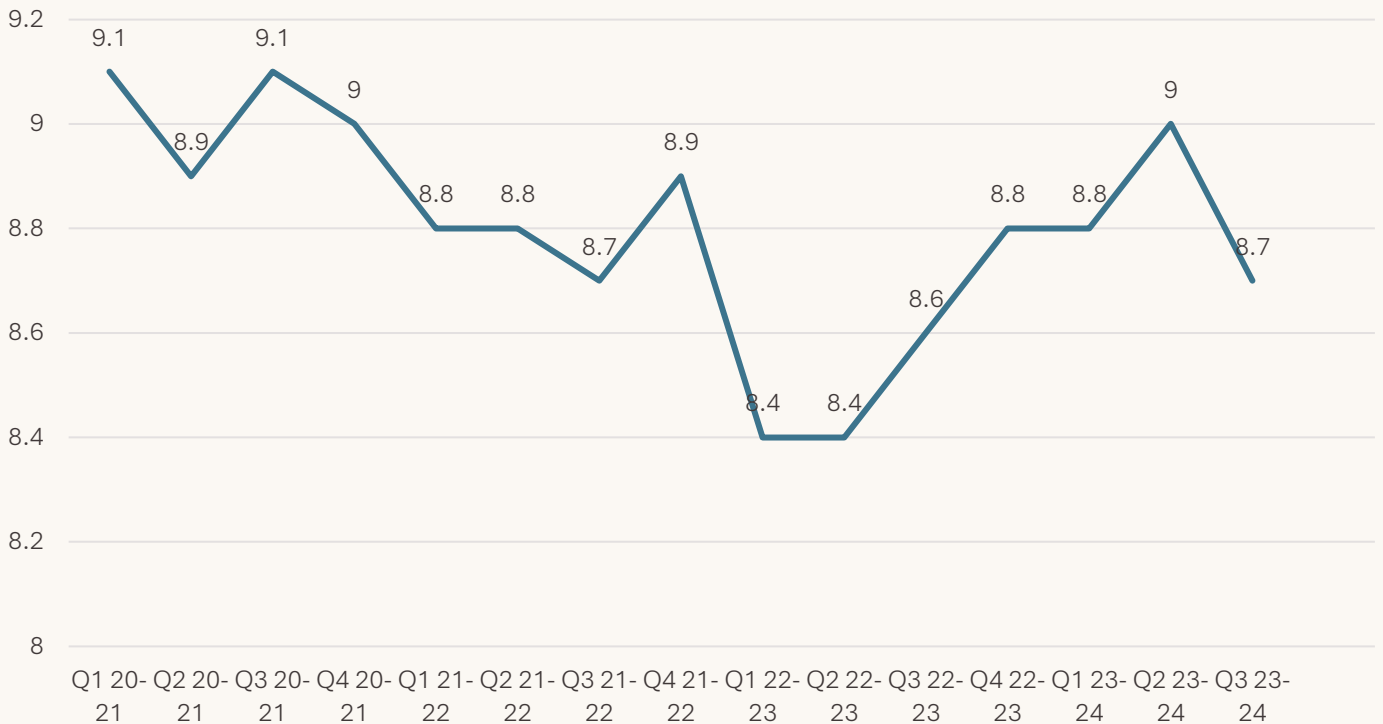
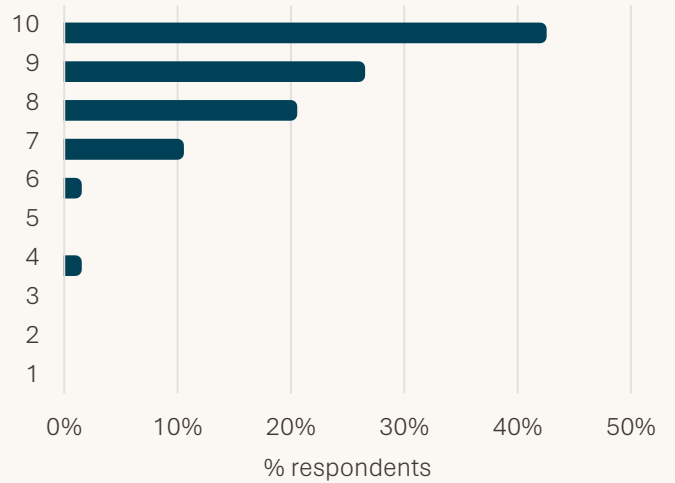
# SATISFACTION MEASURES

# 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 8.5 (out of 10), while international visitors rate it higher at 9.2 (out of 10). Overall satisfaction scores are notably higher among North Island residents (8.8), visitors aged 60+ (9.2), and those visiting the region for the first time (9.2).

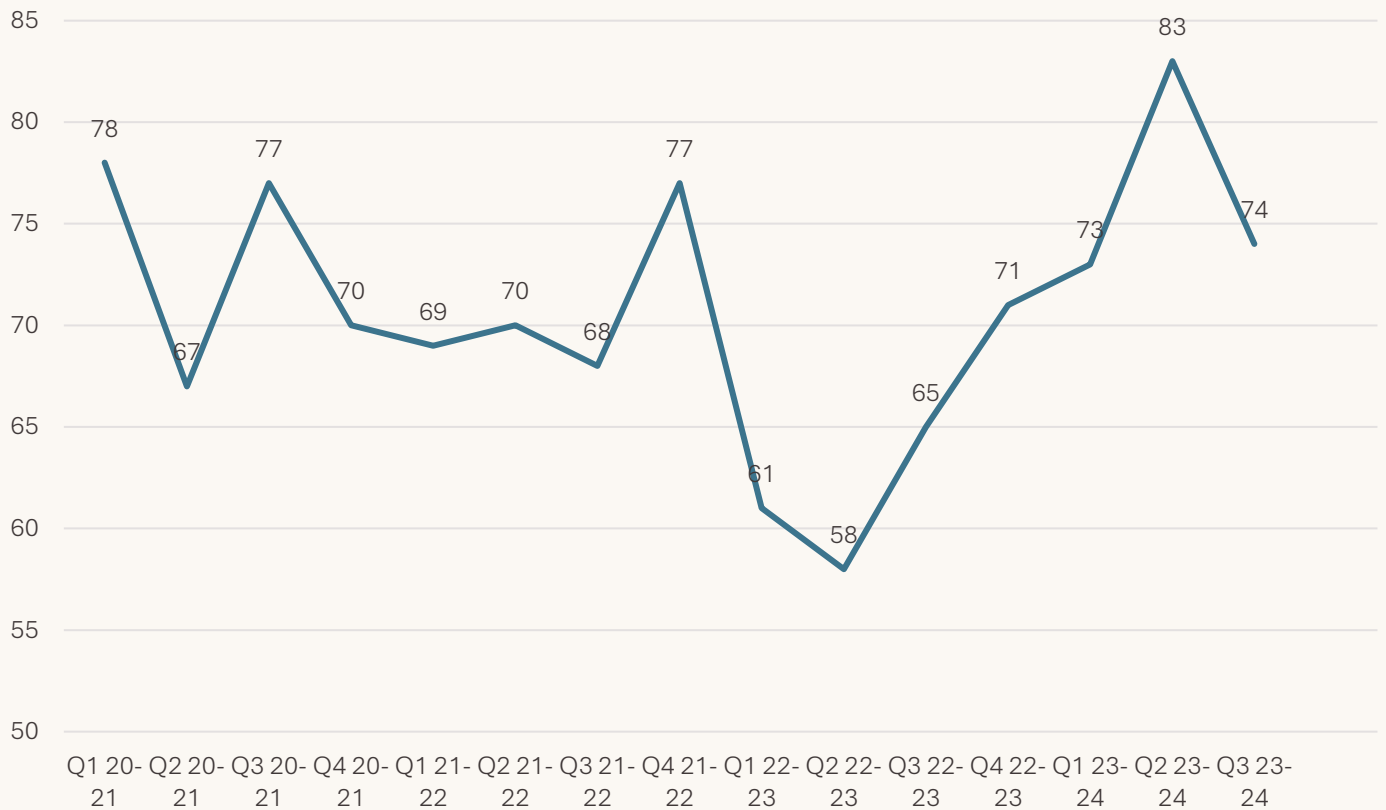
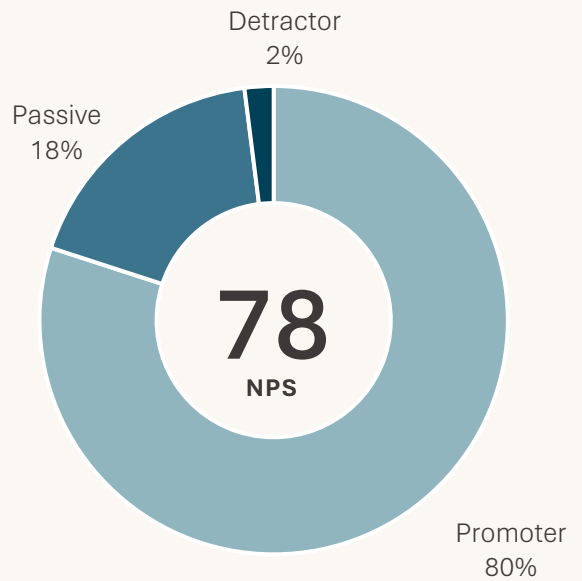


Source: Queenstown Lakes Visitor Experience Survey, Destination Queenstown and Lake Wānaka Tourism, conducted by Angus & Associates. Time period: 1 July 2023 – 31 December 2023. Base: Queenstown Visitors – total sample (n=355). While sample size is building results are to be treated as indicative.

# SATISFACTION MEASURES

## NET PROMOTER SCORE

Queenstown boasts an impressive Net Promoter Score (NPS) of +78 indicating a strong advocacy for the region as a destination. International visitors exhibit an even higher NPS of +88 compared to domestic visitors at +65.



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# SATISFACTION MEASURES

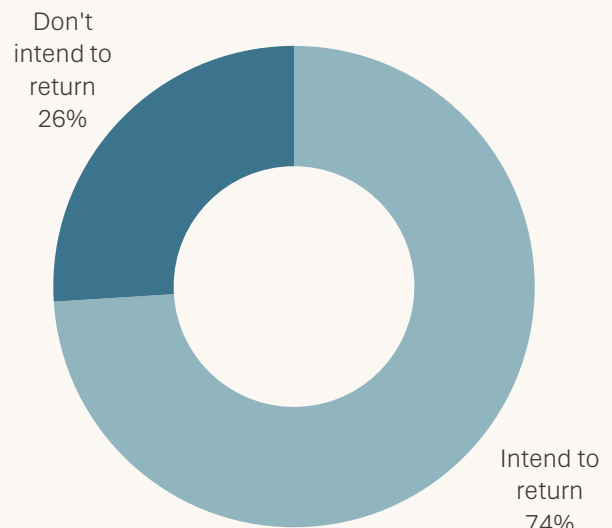
## AREAS FOR IMPROVEMENT

One area identified for improvement is the ease of parking in the region. This concern is reflected in satisfaction ratings and in comments suggesting that improving traffic flow and the availability of parking are key opportunities for improvement. One in ten domestic visitors expressed concerns about the cost of visiting the region, a concern less prominent among international visitors.

Improve traffic flow/traffic management/road access	16%
Improve parking (availability, cost)	15%
Reduce cost of visiting (accommodation, food, activities)	9%
Limit roadworks & construction	8%
Improve public transport	5%
Address overcrowding	3%
Improve accommodation (options, cost)	3%
Improve pedestrian / walking experience	2%

## INTENTION TO RETURN

Looking ahead, two thirds of domestic visitors and a quarter of international visitors express intentions to return to the region within the next 12 months. Total sample around 74% of visitors intend to return to Queenstown again in the future.



# 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 Wanaka).

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 Wanaka 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/Wanaka area on their behalf with Trees that Count and a \$150 donation made in their name to Love Queenstown/Love Wanaka), 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	51%
Destination e-newsletter	27%
On-Site Field Staff	22%
Other	2%
<b>Queenstown Visitor Sample</b>	<b>N = 355</b>

## DATA WEIGHTING

	Dom.	Int.
Actual Visitors	168	187
	47%	53%
Weighted Visitors	148	210
	48%	55%
<b>Weighting Factor</b>	<b>0.88</b>	<b>1.12</b>

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	14%
30-39 years	21%
40-49 years	20%
50-59 years	22%
60-69 years	16%
70-79 years	6%

### GENDER

Male	36%
Female	63%
Gender Diverse	1%

### PRIOR VISITS TO THE REGION

This is (or was) my first visit	39%
I have visited once before, or a few times	17%
I have visited many times	26%
I used to live in the Queenstown region	2%



