

# QUEENSTOWN VISITOR SURVEY

2020/21 – Quarter 3 Update



# SUMMARY

## MOTIVATORS TO VISIT

Almost all domestic visitors to Queenstown are travelling for a holiday or short break, with a third of this group travelling to Queenstown to see or do a specific attraction or experience. In the most recent quarter, visiting Milford Sound was the most common experience for a Queenstown visit to be based around.

Queenstown's outstanding natural landscapes and tourism activities, and the opportunity to spend time with family, friends or a partner are the most common motivators for a visit to Queenstown. Three in five domestic visitors see the natural environment and scenery as important in their decision to visit the region, and for one in two domestic visitors Queenstown's tourism activities and experiences are important in the decision.

## TRAVEL BEHAVIOUR

Domestic visitors to Queenstown are most likely to travel with their partner or spouse. 43 percent of visitors are travelling as a couple with no other companions. The majority of visitors include another destination on their itinerary, with the most common being Wanaka and Milford Sound. A fifth of domestic visitors to Queenstown do not leave the Queenstown town or urban centre during their trip (e.g. they don't explore the wider region). The average length of stay for domestic visitors is three nights, however 30 percent stay for five nights or more.

When choosing accommodation, price remains the biggest deciding factor but location, special offers and family needs are also commonly considered. Almost half stay in a hotel during their visit and only six percent staying in non-commercial accommodation. While domestic flights are the most common means of getting to Queenstown, a rented vehicle or walking are the most common means of getting around Queenstown.

Queenstown's restaurants and cafes, shopping and sightseeing continue to be the most popular activities and experiences for domestic visitors. A quarter of visitors are participating 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, with the time of year and weather conditions being the most common barriers.

## SATISFACTION WITH VISITOR EXPERIENCE

Domestic visitors are generally quite satisfied with their experience in Queenstown. Ease of walking around Queenstown and ease of way finding rate highly. One area that causes dissatisfaction however is ease of parking vehicles, something to be considered given 69 percent of visitors use a private or rented vehicle to get around the destination. Queenstown is also well perceived as a destination that's safe, clean and tidy, and welcoming (all rate an average of 8.9 or above, out of ten). The level of customer experience and the availability of rubbish bins also rate highly.

Overall experience in Queenstown rates at 9.1 out of ten. Queenstown's Net Promoter Score is +73, up one point from the previous reporting period. Visitor groups most likely to recommend Queenstown as a visitor destination include Bay of Plenty residents, those who travelled with friends, and those who visited Kingston on their trip.

## BACKGROUND & METHODOLOGY

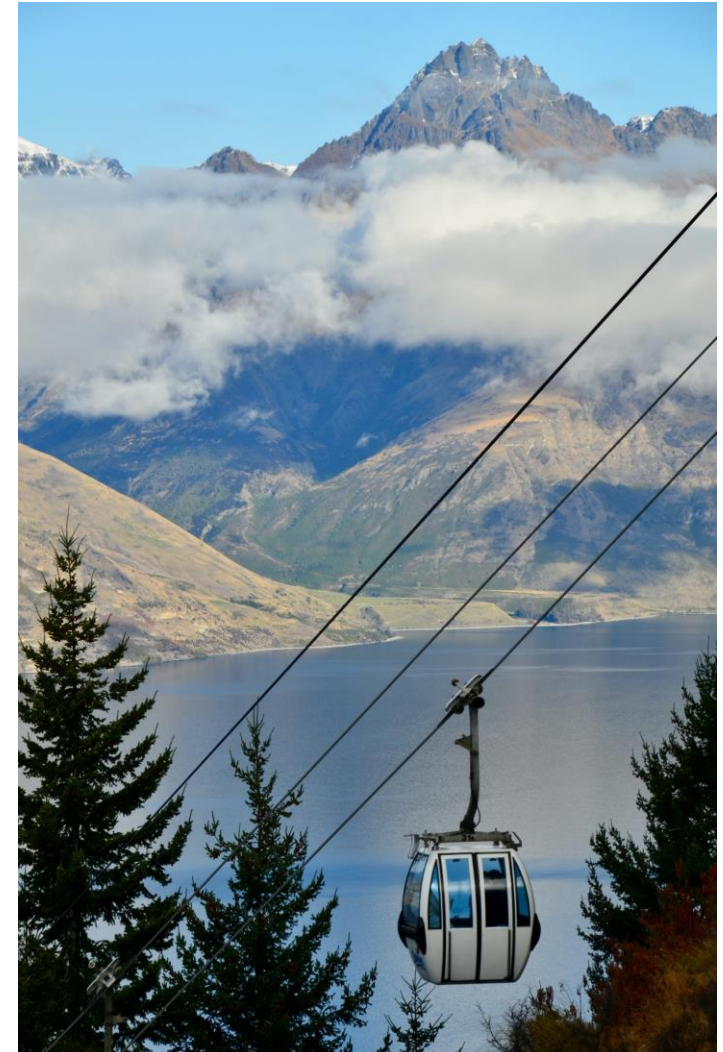
The Queenstown Visitor Survey (QVS) helps Destination Queenstown and members better understand the profile, travel behaviour, expectations and experiences of visitors to the Queenstown region.

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 initial findings in what will be an ongoing series of quarterly updates. Responses are from visitors to Queenstown in September 2020 – March 2021. As the sample grows further analysis will be possible, including highlighting 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	92%
Visit family or friends	3%
To attend an event held by someone else	2%
To attend an event held by friends or family	1%
For other business reasons	1%
To attend a conference, convention, or other business event	0%
To make a transport connection/just passing through on way to somewhere else	0%
For education/study	0%
Other	1%

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



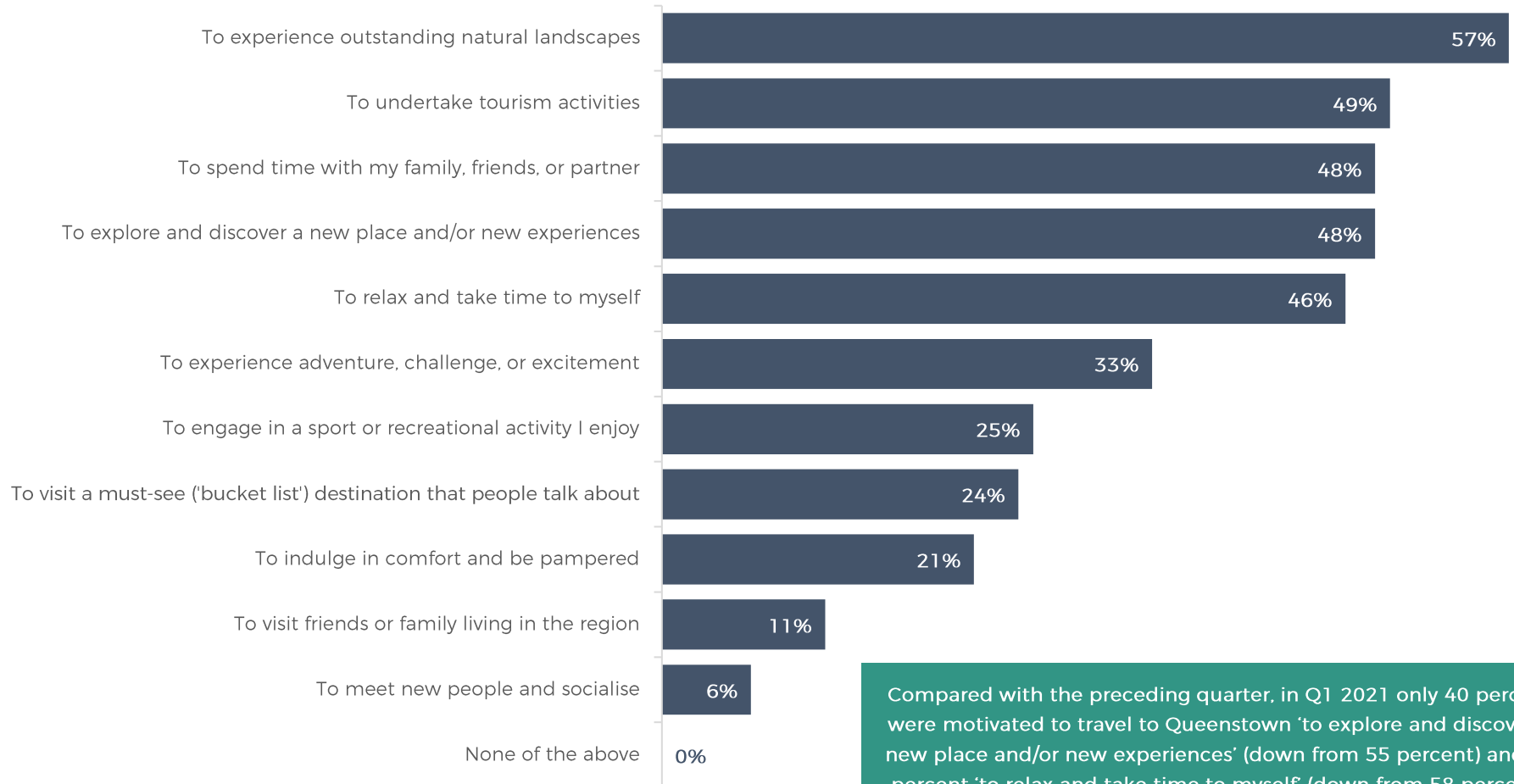
Base: Total Sample Sep 20 - Mar 21 n=480





# VISIT MOTIVATORS

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

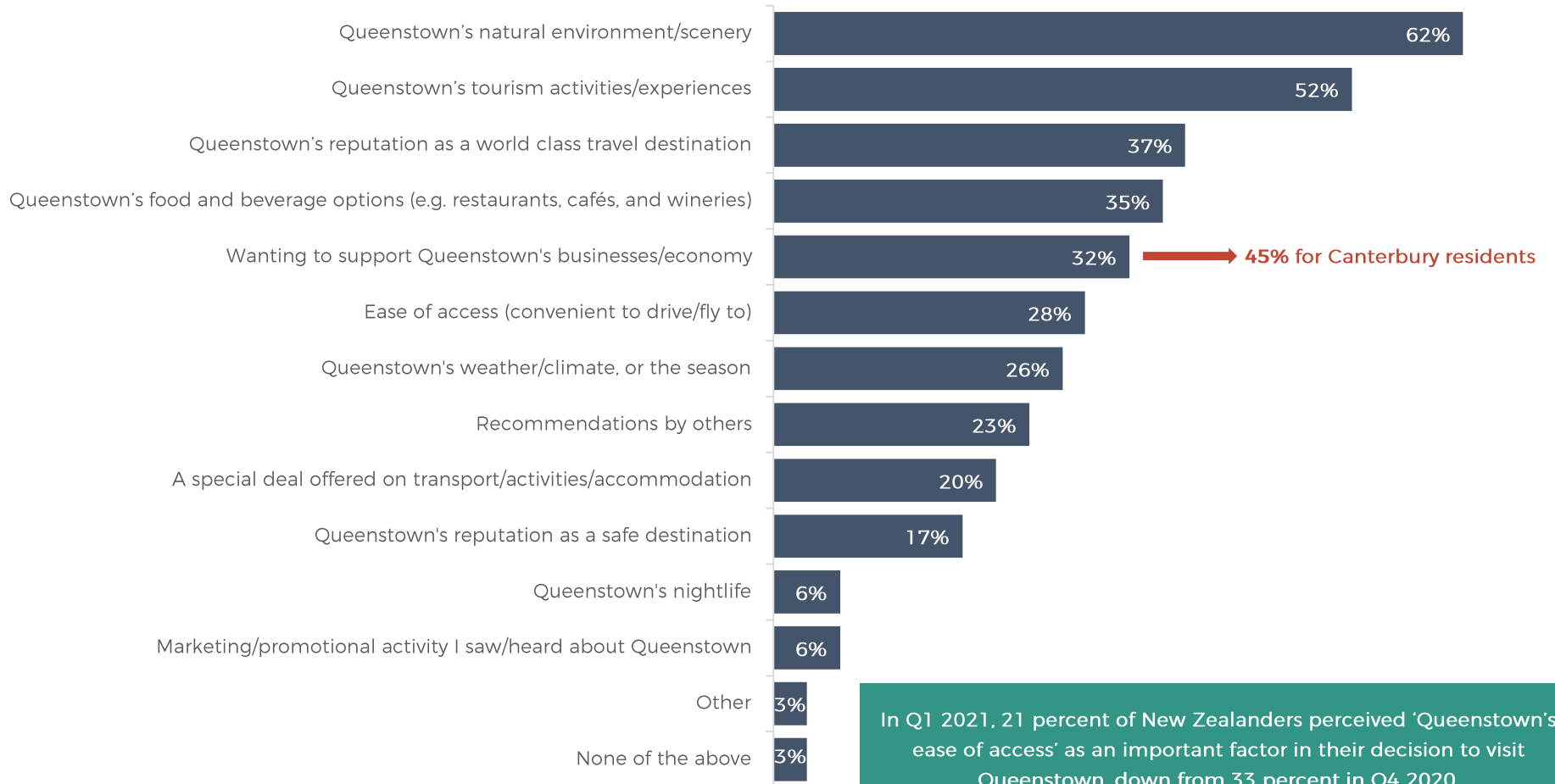


Compared with the preceding quarter, in Q1 2021 only 40 percent were motivated to travel to Queenstown 'to explore and discover a new place and/or new experiences' (down from 55 percent) and 38 percent 'to relax and take time to myself' (down from 58 percent).



## DESTINATION DECISION DRIVERS

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





# DESTINATION EXPERIENCE & DISPERSAL/FLOWS

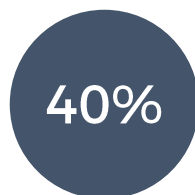
How many times have you visited Queenstown?

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?



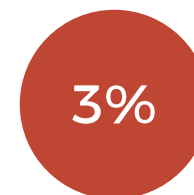
First visit to Queenstown



Visited **once/few times**



Visited **many times**



Used to live in Queenstown

Dispersal within QZN region	
Queenstown town centre	91%
Queenstown urban area	53%
Arrowtown	64%
Cardrona	27%
Glenorchy	27%
Lake Hayes	26%
Gibbston Valley	25%
Kingston	14%
Kelvin Heights/Kelvin Peninsula	12%
Other	4%
Base: Total Sample Sep 20 - Mar 21 n=480	

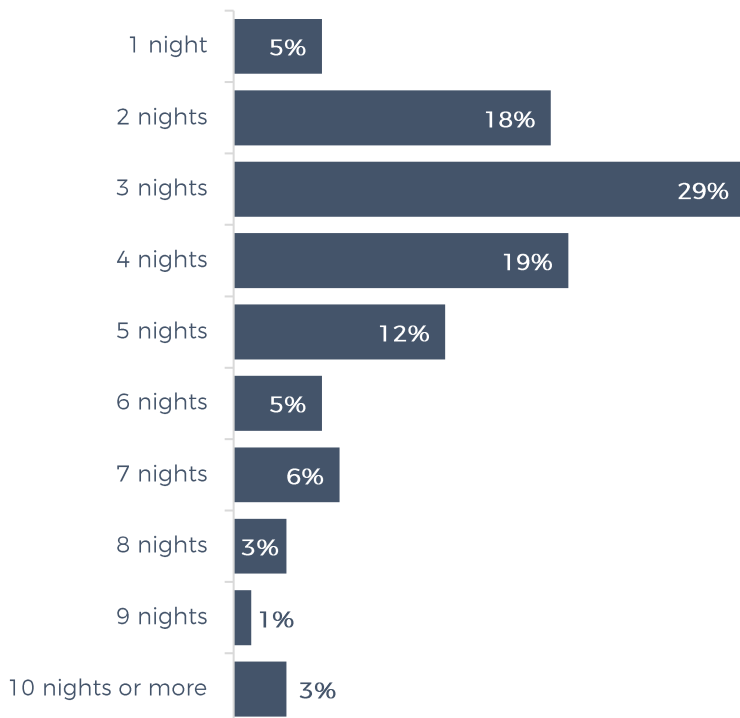
→ **20% QZN town or urban area only**

Other regions visited	
None – Queenstown region only	38%
Wanaka	43%
Milford Sound	26%
Other location(s) in Fiordland outside of Milford Sound (incl. Te Anau)	17%
Other locations(s) in Otago outside of Queenstown and Wanaka (incl. Dunedin)	15%
Canterbury (including Christchurch)	15%
Southland (including Invercargill)	11%
Other South Island region(s)	9%
West Coast	9%
Other North Island region(s)	5%
Base: Total Sample Sep 20 - Mar 21 n=480	

## LENGTH OF STAY / TRAVEL COMPANIONS

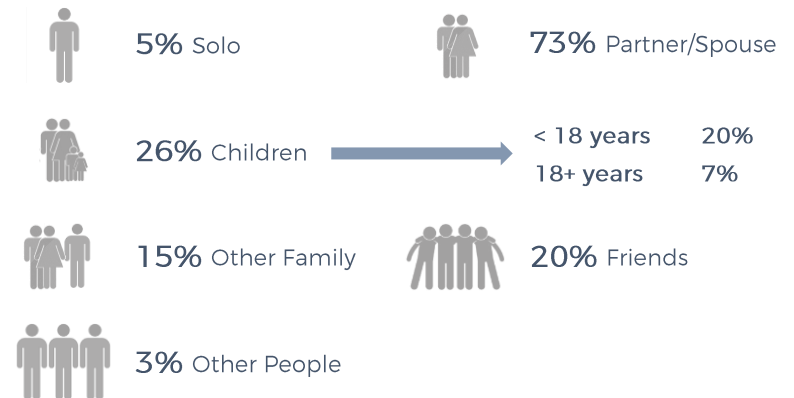
How many nights in total do you intend to stay, or did you stay, in Queenstown?  
Who travelled/is travelling with you?

### Length of Stay

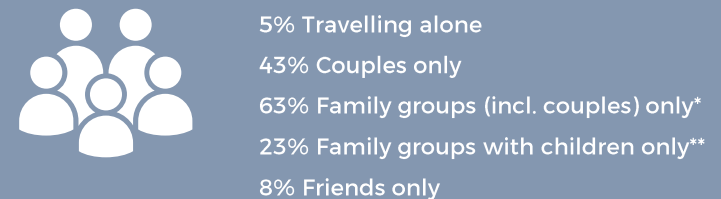


The median length of stay is 3 nights  
(4 nights for Aucklanders and 4 nights for those on their first visit)

### Travel Party



#### Group types



\* Respondent travelled with any of their partner/spouse, children of any age and/or other family members but no others

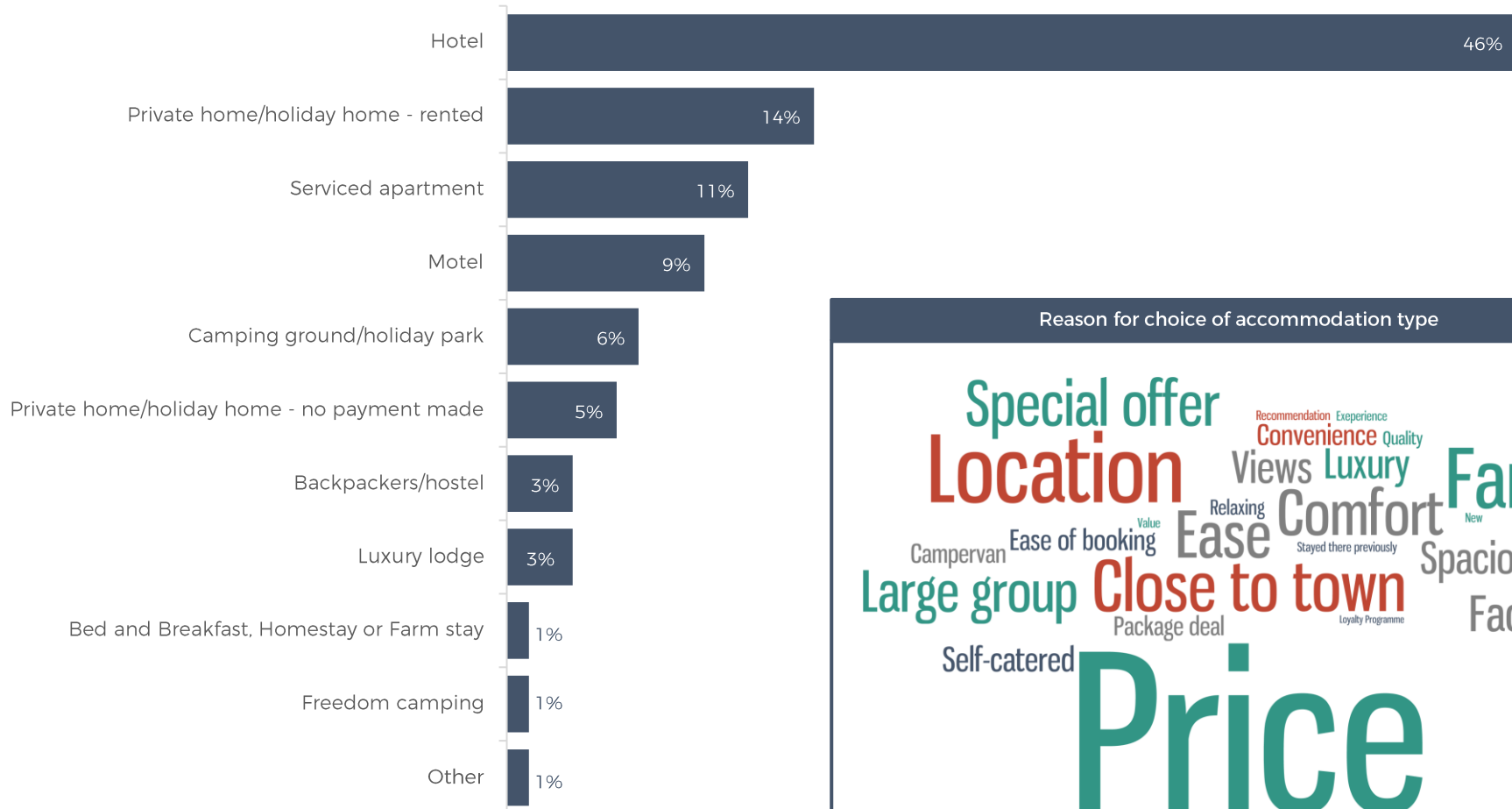
\*\* Respondent travelled with their child/children (of any age) and no others apart from partner/spouse and/or other family members where applicable





# 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?

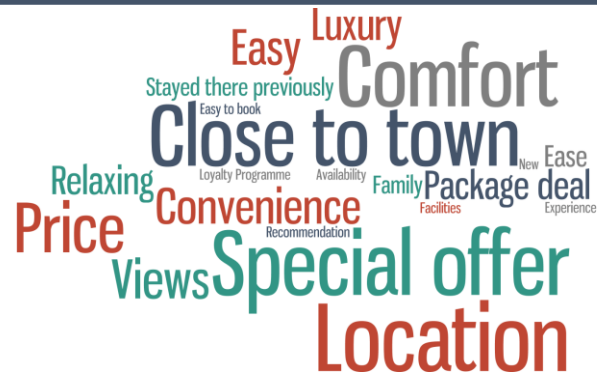




## ACCOMMODATION CONT.

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

Hotel



Private Home/Holiday Home - rented



Serviced Apartment



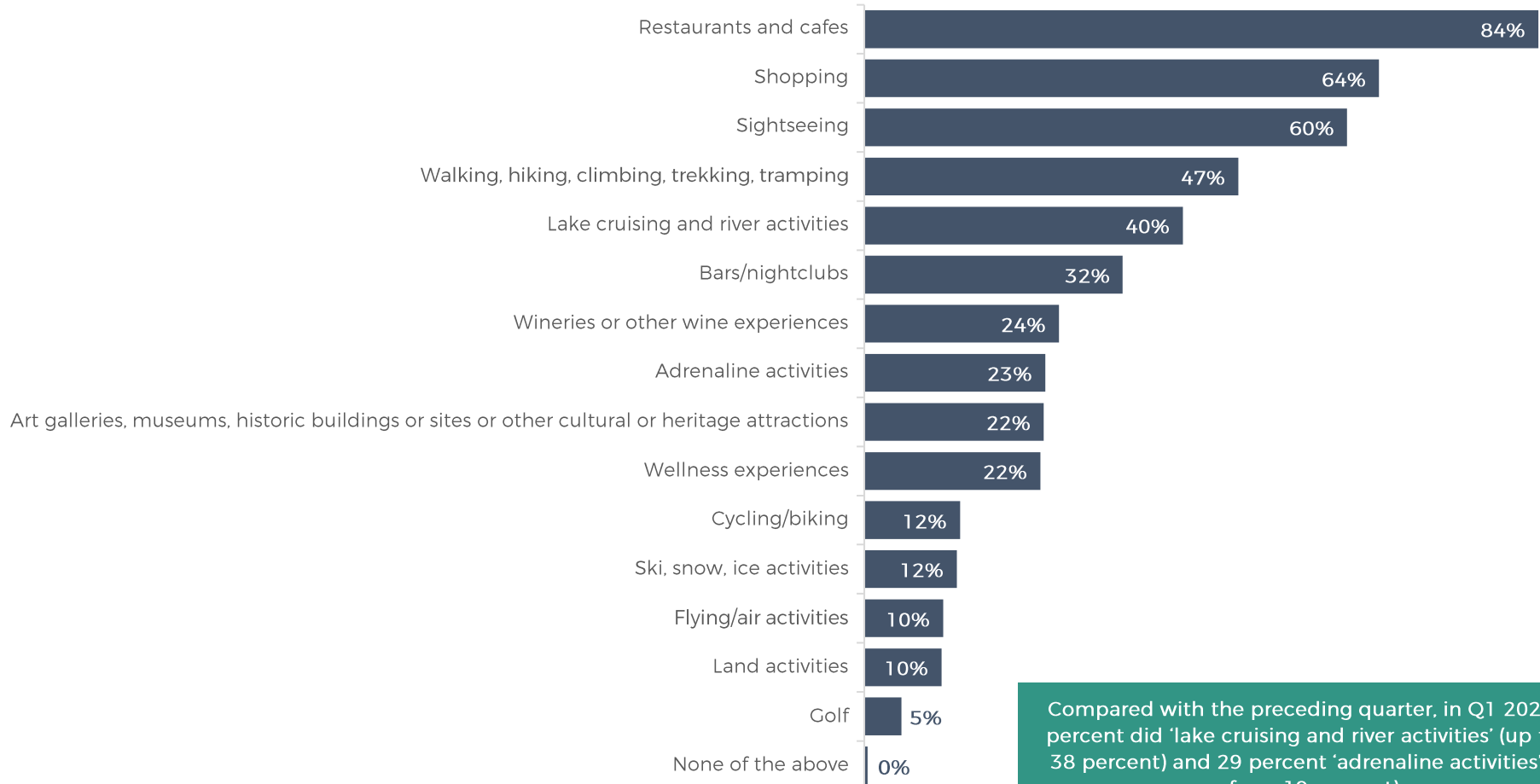
Motel





## ACTIVITIES/EXPERIENCES

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



Compared with the preceding quarter, in Q1 2021 50 percent did 'lake cruising and river activities' (up from 38 percent) and 29 percent 'adrenaline activities' (up from 19 percent).

## 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?)

### 39% mentioned an activity or attraction they would have liked to visit/experience

In Q1 2020 specifically, jet boating, Skyline Queenstown's gondola and luge, skiing and Milford Sound were the most common activities and experiences mentioned. Time of year (e.g not winter) and weather conditions were common reasons for visitors not doing the activity or experience they would have liked to do.

"Was meant to do mountain carting at Cardrona and a trip to Milford Sound but weather meant this was cancelled"

"Would have liked to Zip Line but takes too long. Just wanted to zip line without all the guff."

"Wanted to do river rafting but it's far too expensive compared to prices in other regions of NZ"

"Skydiving but it was not operating on the day I wanted"

"Skiing, snow activities that we didn't get to do because its summer."

"Cardrona distillery"

"Milford sound fly cruise fly and Cardrona mountain carting were both cancelled due to poor weather conditions"

"Weather bad otherwise would have done more walks"

"Wanted to try golf, but the Millbrook pro was off for the weekend"

"Helicopter Rides. Didn't have enough time also would love to do it when it snows."

"Canoeing but the weather was too cold"

"Ben Lomond track - wanted to walk early and start from the top of the Gondola but the Gondola didn't open until 9:30am. Would be great if Gondola opened earlier."

"A couple of planned water activities cancelled due to wind"

"Skydiving But a bit too expensive"

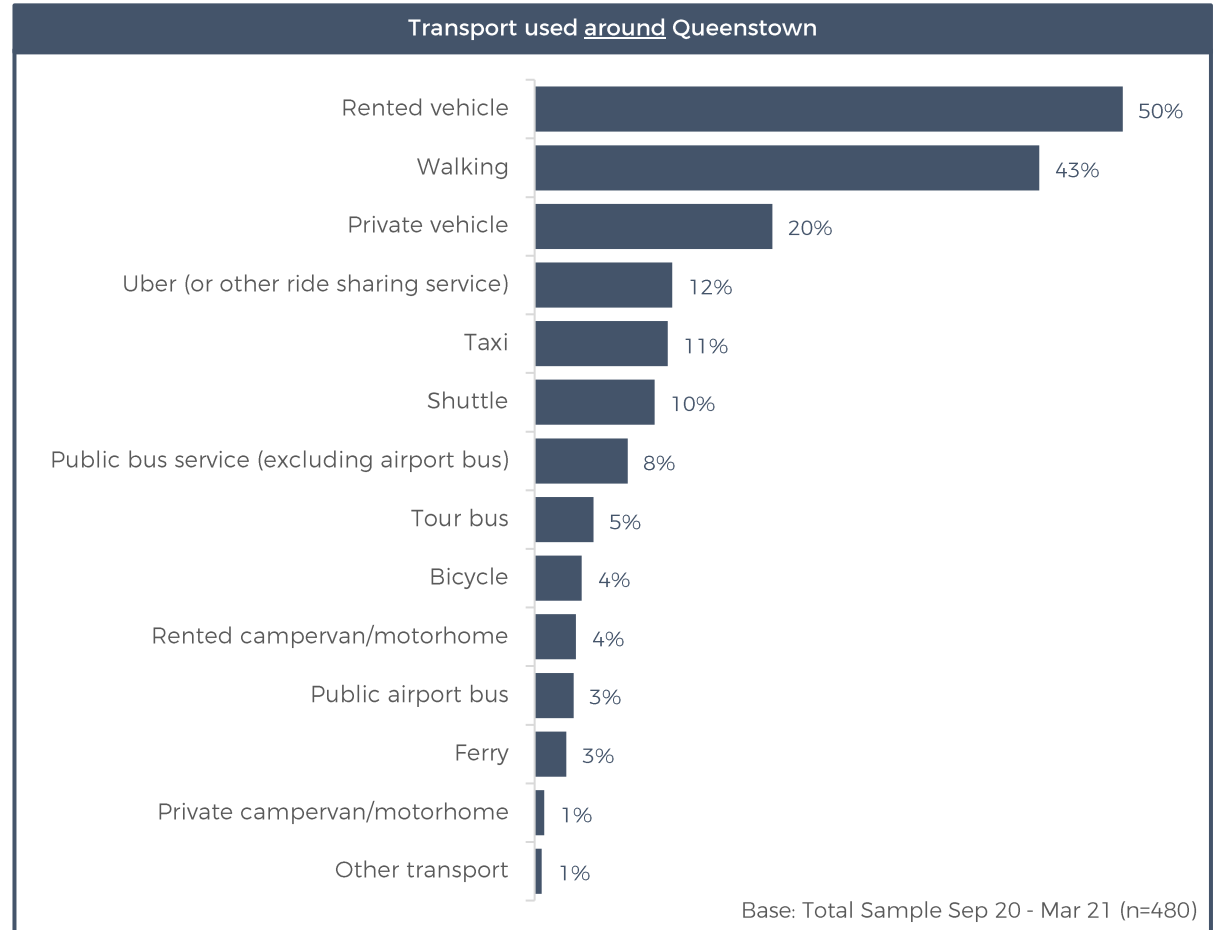


# TRANSPORT

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

Transport used <u>to</u> Qtown	%
Scheduled domestic flight	69%
Private vehicle	17%
Rented vehicle	13%
Scheduled bus/shuttle service	1%
Other transport	0%
Base: Total Sample Sep 20 - Mar 21	n=480

81% of Aucklanders travelled to Queenstown on a domestic flight compared to 62% of other domestic visitors





# 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)

			Not at all satisfied					Extremely Satisfied						
Sep 2020 – Mar 2021	n=	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	N/A
Ease of walking around Queenstown	480	9.1	0%	0%	0%	1%	1%	2%	2%	4%	15%	18%	56%	0%
Ease of cycling around Queenstown *	19	8.9	0%	0%	0%	0%	0%	0%	11%	5%	21%	11%	53%	0%
Ease of finding your way around	480	8.9	0%	0%	0%	0%	0%	3%	3%	7%	18%	20%	47%	1%
Queenstown Airport passenger facilities	331	8.7	0%	0%	0%	1%	1%	2%	5%	8%	17%	22%	39%	5%
Ease of getting information about transport options	480	8.4	0%	0%	1%	1%	1%	4%	5%	7%	10%	9%	28%	34%
Ease of driving around Queenstown	349	8.0	0%	1%	0%	2%	3%	7%	7%	12%	19%	14%	34%	1%
Ease of using public transport around Queenstown	480	8.0	0%	1%	0%	1%	2%	4%	2%	3%	5%	5%	18%	58%
Ease of parking your vehicle	349	5.9	4%	3%	9%	7%	8%	13%	10%	10%	11%	7%	16%	3%

\* Caution low sample size





# 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%	20%	21%	52%
Queenstown town centre/urban area is clean and tidy	8.9	0%	0%	1%	0%	1%	1%	2%	7%	23%	22%	44%
I feel/felt welcome in Queenstown	8.9	0%	0%	0%	0%	0%	4%	1%	8%	21%	19%	47%
Queenstown is managing tourism activity well	8.6	0%	0%	0%	0%	0%	5%	3%	10%	21%	20%	39%
I don't/didn't feel concerned about anti-social behaviour in Queenstown	8.6	0%	0%	0%	1%	0%	6%	3%	7%	19%	21%	41%
It is easy to get around Queenstown	8.6	0%	0%	0%	1%	1%	4%	3%	10%	21%	17%	43%
Queenstown cares about the environment	8.5	1%	0%	0%	1%	0%	6%	3%	12%	20%	19%	39%
It is easy to interact with local people in Queenstown	8.4	0%	0%	0%	1%	1%	10%	4%	8%	21%	16%	39%
Base: Total Sample Sep 20 - Mar 21	n=480											



# 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?

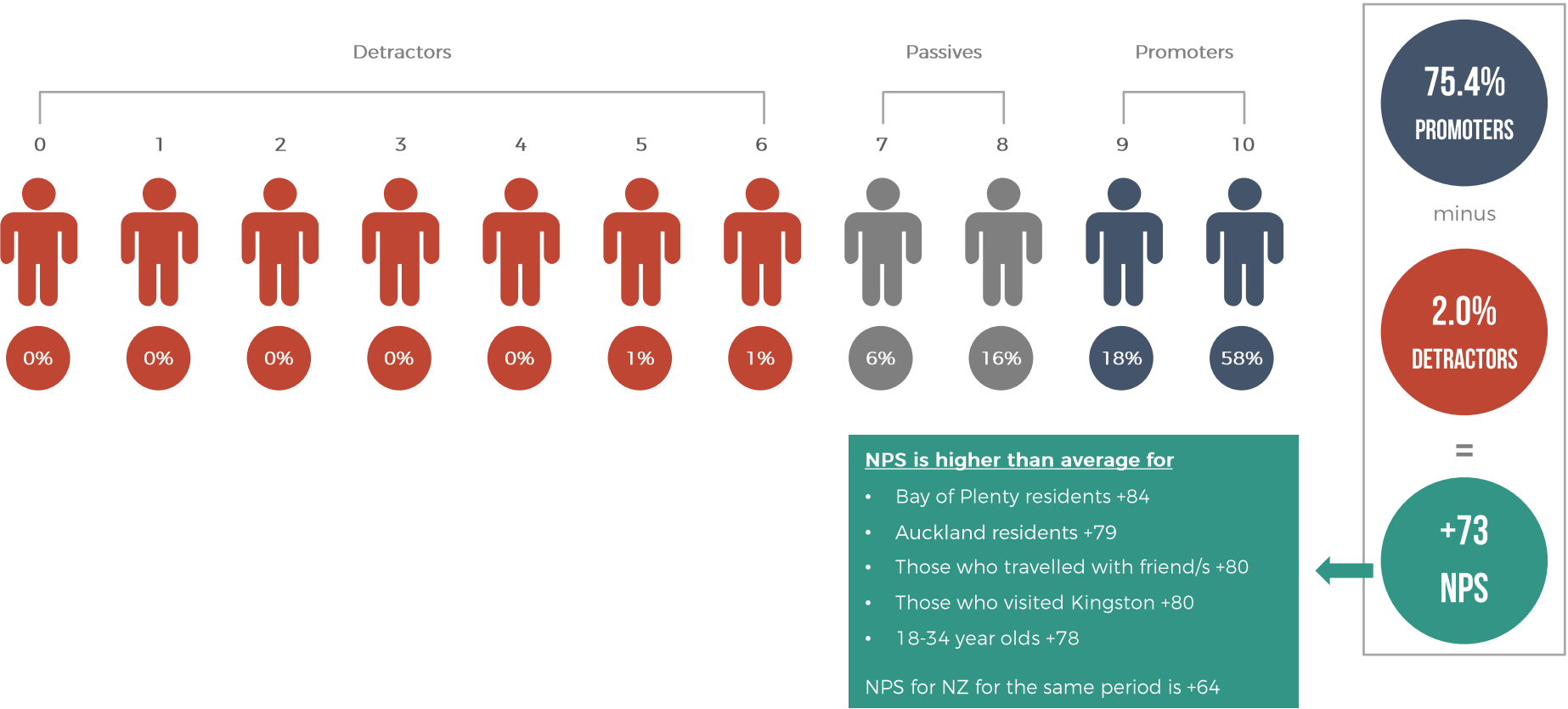
		Not at all satisfied											Extremely Satisfied	
	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	N/A	
The level of customer service experienced	8.7	0%	0%	0%	0%	0%	3%	3%	9%	23%	22%	39%	1%	
Availability of rubbish bins	8.5	0%	0%	1%	0%	1%	4%	6%	10%	21%	18%	36%	4%	
Availability of clean public toilets	8.4	0%	0%	0%	1%	1%	3%	4%	14%	18%	14%	30%	15%	
Availability of recycling bins	8.3	1%	0%	1%	1%	1%	6%	7%	9%	17%	16%	34%	9%	
Availability of Wi-Fi in public areas	7.9	1%	0%	1%	2%	1%	5%	4%	9%	12%	9%	19%	37%	
The value for money I experienced	7.2	1%	1%	2%	4%	3%	10%	12%	16%	20%	11%	19%	1%	
Overall experience in Queenstown	9.1	0%	0%	0%	0%	0%	1%	1%	6%	20%	24%	46%	1%	
Base: Total Sample Sep 20 - Mar 21	n=480													



# 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.





## OPPORTUNITIES FOR IMPROVEMENT

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

In Q1 2021, affordability, parking availability and the weather were the most cited things that could have improved visitors' experience in Queenstown.

"I find Queenstown far too expensive. White history information available only, totally ignoring Maori culture."

"Difficulty finding parking in the city centre area"

"More affordable activities and for older teenagers to still be included as a family"

"I fly drone, safely, but too many beautiful places in Queenstown that I can't fly it because so many no drone area everywhere. Drone footage is good to help attract tourists. And that is the main reason I brought my drone with me."

"Cost of recreation activities could be reduced a bit more for domestic tourist market. This applies to restaurant and wineries as well."

"Less traffic. The roads are extremely busy"

"Once road works are finished and roads are clear of cones?"

"Parking availability"

"Parking for campervans"

"cost of some activities in Queenstown are quite expensive... good deals on Bookme though"

"Gondola opening earlier than 9:30am"

"Pricing more in line with Christchurch/Dunedin"

"Town map?"

"If more restaurants were open later i.e. past 12am (midnight)"



## HIGHLIGHTS

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

In Q1 2021, the most common highlights were Queenstown's scenery and landscapes, activities and attractions, and food and wine offerings. Some respondents commented on the 'relaxing' and 'quiet' atmosphere in the township given the lack of visitors, however most acknowledged that this also meant local operators would be hurting.

"Everything is within walking distance"

"The food was outstanding and the scenery breath taking"

"Very quiet with few tourists shorter lines more affordable activities - I do feel for local businesses though"

"Million Dollar lake cruise was a winner. Good price and good entertainment."

"Relaxed atmosphere. It's refreshingly compact and accessible."

"I enjoyed jet boating so much I am going to do it again!"

"Being up on Coronet Peak watching the Mountain Biking NZ champs. Please hold it again at same venue."

"The town itself, the vibe around Queenstown although it is quieter than previously experience, scenery in and around Queenstown, activities are endless and I personally can relax and wind down in Queenstown"

"Skydive was amazing. NZOne team were bloody awesome to deal with before during and after skydive."

"All the activities we did especially the Shotover Jet, TSS Earnslaw cruise and Walter Peak"

"The people were very welcoming considering I wear moko, it was a pleasurable experience being accepted & welcomed to this beautiful place."

"Mountain biking and canyon swing"

"The sights are amazing with majestic views. The mountains and lake are amazing."

"Lack of people - I know locals are hurting but as a visitor loved the lack of crowds"



## SAMPLE PROFILE (NEW ZEALAND RESIDENTS)

Country of birth	
New Zealand	69%
Other country	31%
Region of residence	
Northland	3%
Auckland	36%
Waikato	8%
Bay of Plenty	9%
Gisborne	0%
Hawke's Bay	4%
Taranaki	1%
Manawatu-Whanganui	4%
Wellington (& Wairarapa)	17%
Tasman	1%
Nelson	1%
Marlborough	0%
West Coast	0%
Canterbury	10%
Otago	4%
Southland	2%
Base: Total Sample Sep 20 - Mar 21	
n=480	

Gender	
Male	46%
Female	54%
Gender Diverse	0%
Prefer not to say	0%
Age	
18-19 years	2%
20-24 years	8%
25-29 years	14%
30-34 years	11%
35-39 years	9%
40-44 years	10%
45-49 years	11%
50-54 years	13%
55-59 years	6%
60-64 years	7%
65-69 years	4%
70-74 years	4%
75+ years	1%
Base: Total Sample Sep 20 - Mar 21	
n=480	



