

QUEENSTOWN VISITOR SURVEY

2020/21 – Quarter 4 Update



SUMMARY - YEAR ENDING JUNE 2021

VISIT MOTIVATORS

Almost all domestic visitors to Queenstown are travelling for a holiday or short break, and one third of this group travel to Queenstown to see or do a specific attraction/experience. Skyline Queenstown is the most common attraction for a Queenstown visit to be based around, while Milford Sound and skiing are other important drivers.

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. New places/experiences and relaxing are also important. Three in five domestic visitors say Queenstown's natural environment and scenery is important in their decision to visit, and for one third, wanting to support Queenstown businesses is a factor.

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, with the most common being Wanaka and Milford Sound. One in five don't leave the Queenstown town or urban centre during their trip (i.e. they don't explore the wider Queenstown region). The average length of stay for domestic visitors is three nights, and 30 percent are on their first visit.

When choosing accommodation, price is the most common deciding factor but location, special offers and family needs are also commonly considered. Almost half of domestic visitors stay in a hotel during their visit, and almost one quarter of Aucklanders stay in a rented 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.

Queenstown's 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 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, weather conditions, price, loadings, and trip length being common barriers.

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 8.9 or above, out of ten).

At an average of 9.1 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 +73, it is 10 points higher than the NPS for New Zealand as a whole. Visitor groups most likely to recommend Queenstown as a visitor destination include Bay of Plenty residents, and those who travelled with friends.



BACKGROUND & METHODOLOGY

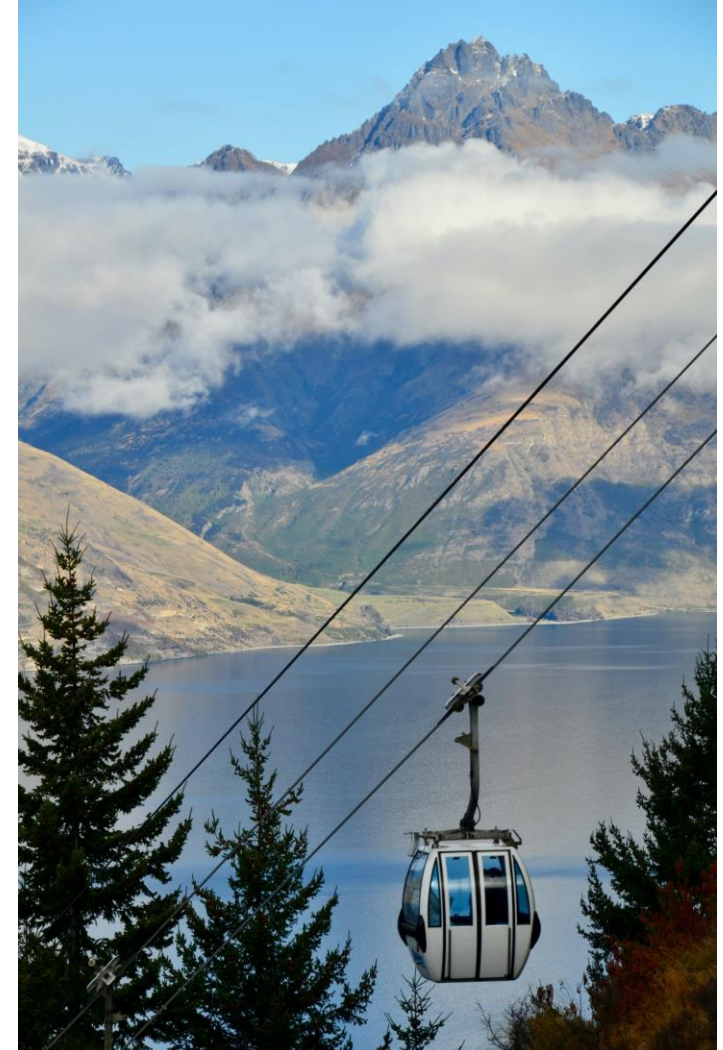
The Queenstown Visitor Survey (QVS) helps Destination Queenstown and members better understand the profile, travel behaviour, expectations and experiences of visitors to the Queenstown region.

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 during September 2020 – June 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	91%
Visit family or friends	3%
To attend an event held by someone else	1%
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 make a transport connection/just passing through on way to somewhere else	1%
For education/study	0%
Other	1%
Base: Total Sample Sep 20 - Jun 21 n=631	

→ **30%** of visitors on holiday/vacation or a short break travelled to Queenstown to see/do a specific attraction or experience, which included.....



In Q2 2021, the most commonly mentioned 'driver' attractions or experiences were Skyline Queenstown (including luge and gondola), the scenery, and Milford Sound.



VISIT MOTIVATORS

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



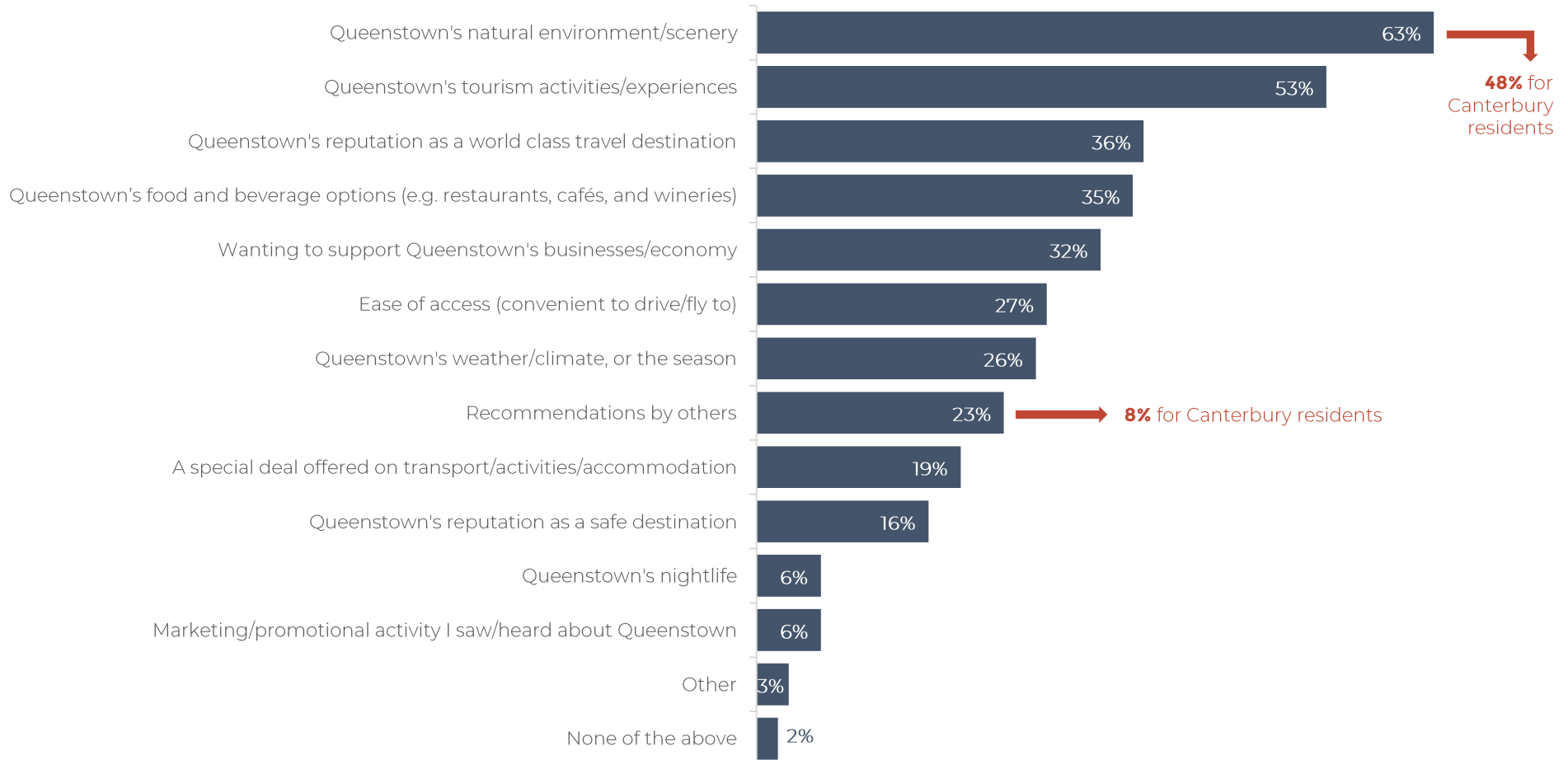
In Q2 2021, 56 percent were motivated to travel to Queenstown to spend time with their family, friends or partner - up from 43 percent in Q1 2021.

Conversely, in Q2 2021, only 13 percent travelled to Queenstown to do a sport or recreational activity - down from 23 percent in Q1 2021, and the lowest proportion across the year.



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?

30%

First visit to Queenstown

41%

Visited once/few times

27%

Visited many times

2%

Used to live in Queenstown

Dispersal within Queenstown region

Queenstown town centre 91%

Queenstown urban area 52%

Arrowtown 66%

Glenorchy 28%

Cardrona 28%

Lake Hayes 26%

Gibbston Valley 24%

Kingston 14%

Kelvin Heights/Kelvin Peninsula 12%

Other 5%

Base: Total Sample Sep 20 - Jun 21 n=631

19% town/urban area only

35% AKL residents

Other regions visited

None – Queenstown region only 36%

Wanaka 43%

Milford Sound 26%

Other location(s) in Fiordland outside of Milford Sound (incl. Te Anau) 17%

Other location(s) in Otago outside of Queenstown and Wanaka (incl. Dunedin) 15%

Canterbury (including Christchurch) 14%

Southland (including Invercargill) 12%

West Coast 9%

Other South Island region(s) 10%

North Island region(s) 4%

Base: Total Sample Sep 20 - Jun 21 n=631

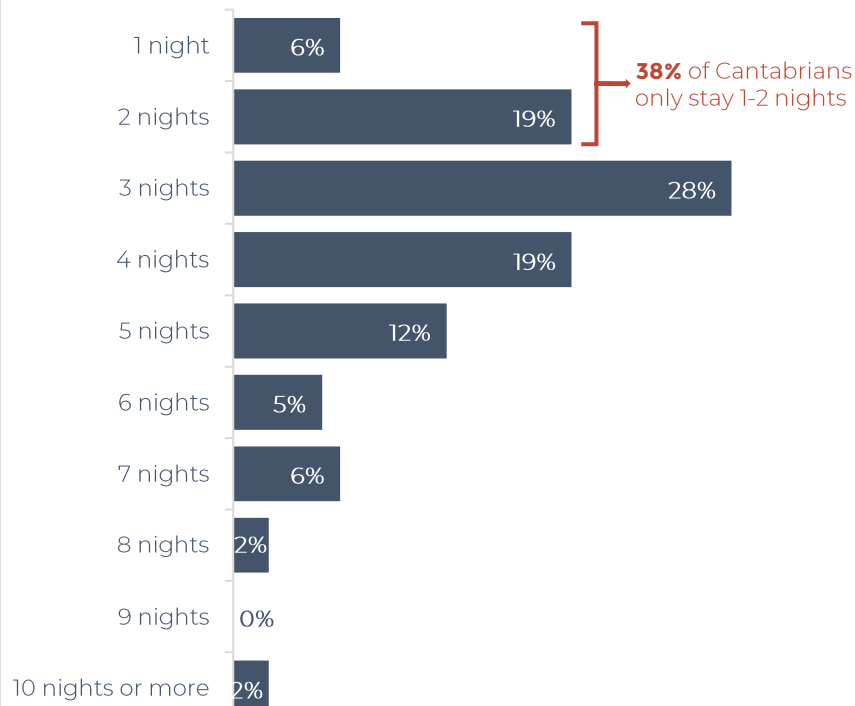
Canterbury residents are more likely to visit Queenstown only (52 percent), and less likely to visit Wanaka (19 percent).



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?

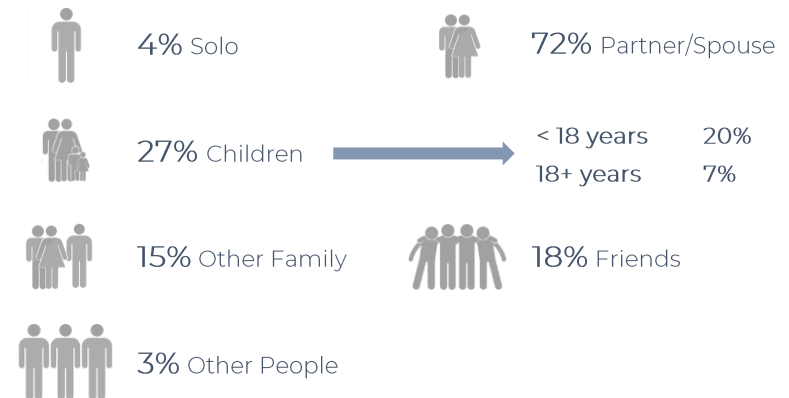
Length of Stay



The median length of stay is 3 nights

(4 nights for: Waikato and Bay of Plenty residents, those who travelled to Queenstown on a scheduled domestic flight, and those on their first visit)

Travel Party



Group types



- 4% Travelling alone
- 45% Couples only
- 76% Family groups (incl. couples) only*
- 22% Family groups with children only**
- 8% Friends only

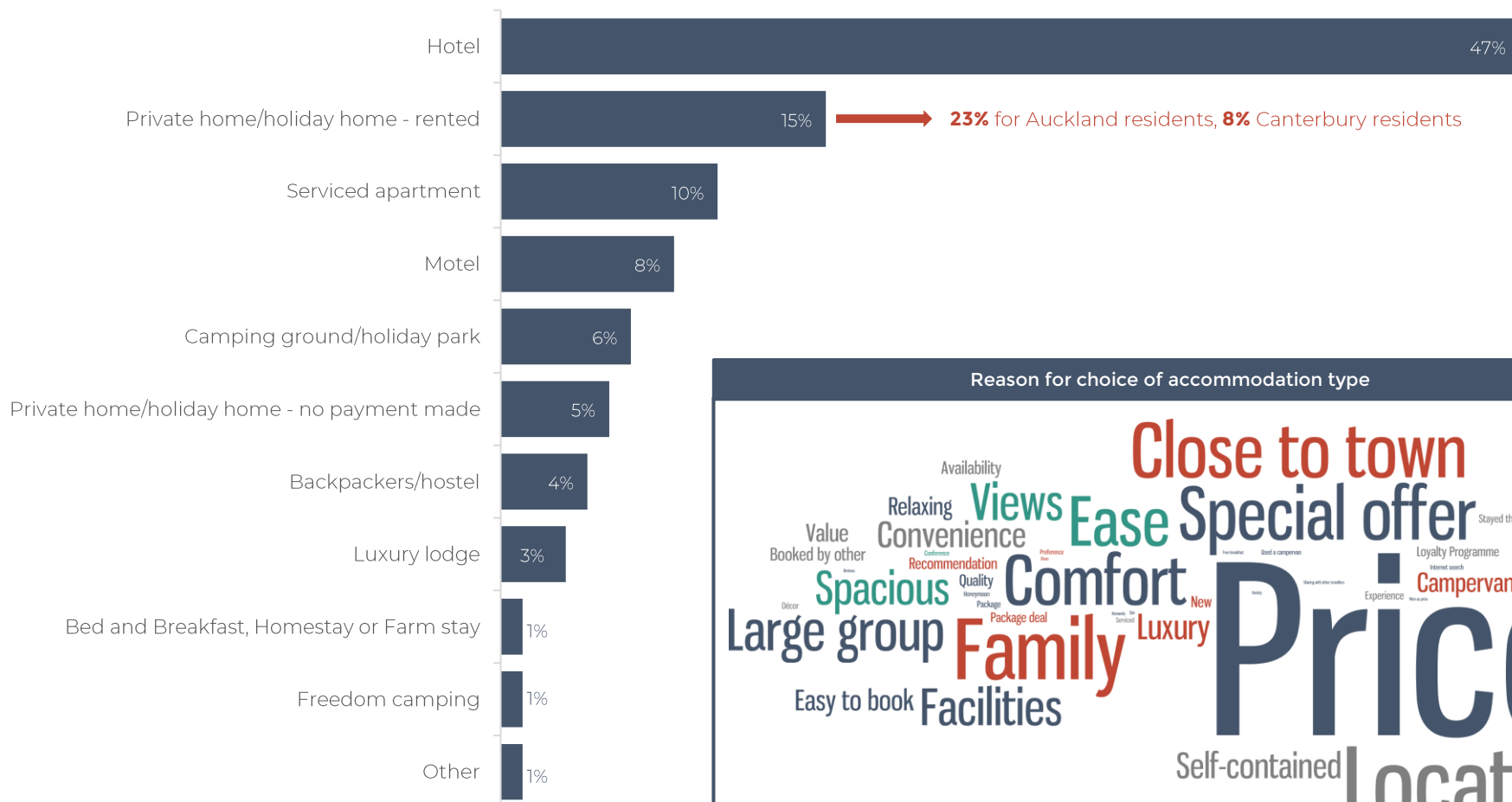
* Respondent travelled with any of their partner/spouse, children of any age and/or other family members but no others

** 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



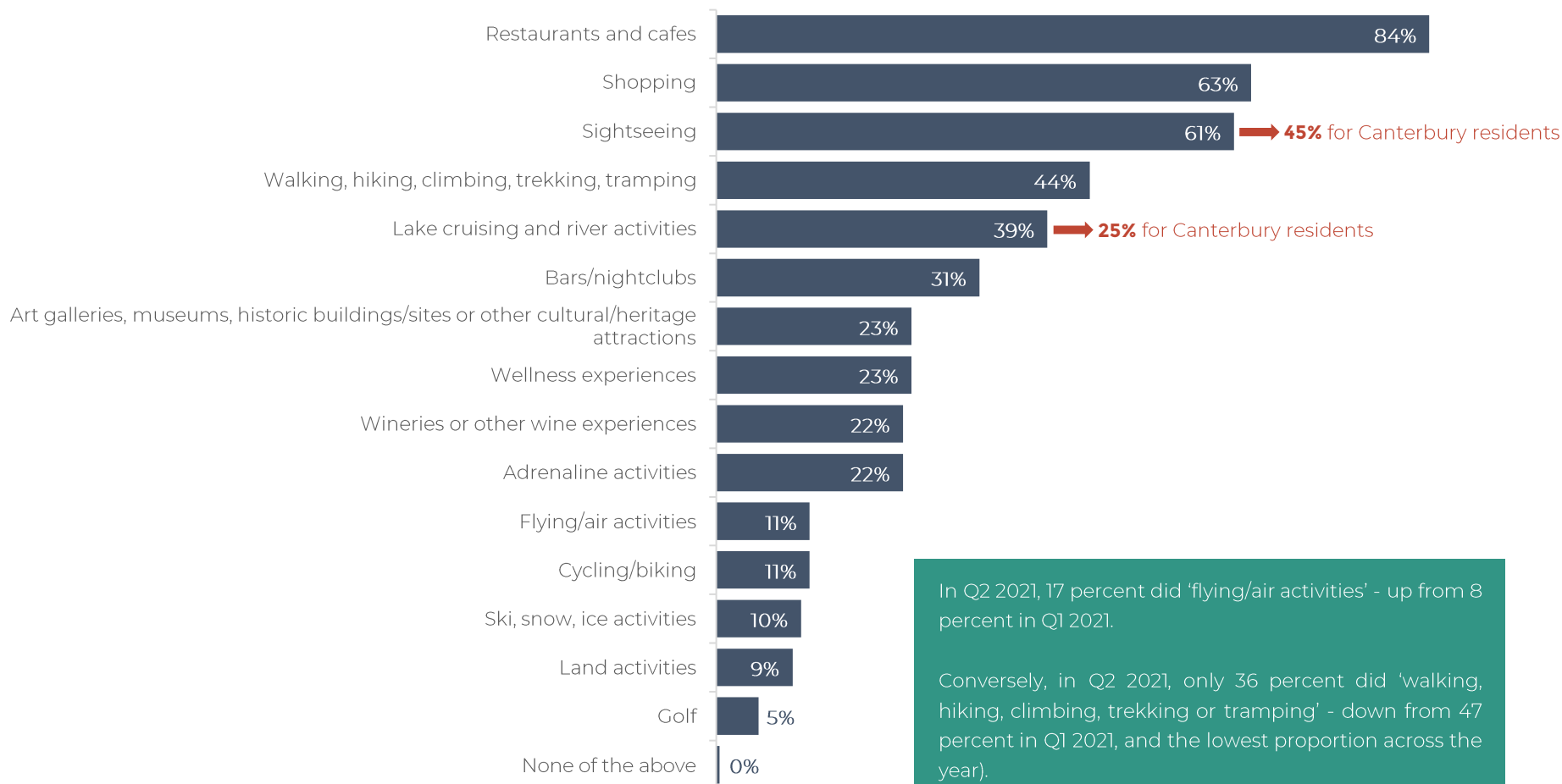
Motel





ACTIVITIES/EXPERIENCES

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





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)	15%
Skiing and snowboarding	12%
Skyline Queenstown (including gondola and luge)	11%
Scenic flights (including helicopters)	9%
Milford Sound	8%
Wineries, breweries and alcohol tasting	8%
Lake Cruise (including the TSS Earnslaw)	7%
Cardrona, The Remarkables, or Coronet Peak	5%
Bungy jumping	5%
Hiking and walking	5%
Skydiving	5%
Other locations (including Glenorchy, Arrowtown & Wanaka)	4%
Biking/cycling	4%
Onsen Hot Pools	3%
Paragliding	2%

Base: Didn't experience an activity/attraction they wanted to n=253

"The kiwi bird sanctuary. Didn't realise it was here and unfortunately was shutting as we walked past."

"Hydro attack was too expensive. Milford Sound was the main goal but bad weather prevented us going."

"Zipline was booked out, the flight/cruise to Milford was cancelled twice by the company and our Dart River trip was also cancelled. We were unable to rebook other activities as we had to wait and see if Milford flight/cruise went ahead."

"Would have like to do the Skyline gondola and kiwi bird park but these activities are really expensively priced"

"Milford Sound by helicopter cancelled due to bad weather"

"Jet boating. Go Orange cancelled two of our planned rides because of not having enough people on the boats."

"Not enough time but would have like to do the chair lift and helicopter ride"

"Gondola ride, bungy jump, shark ride and swing - couldn't due to being pregnant"

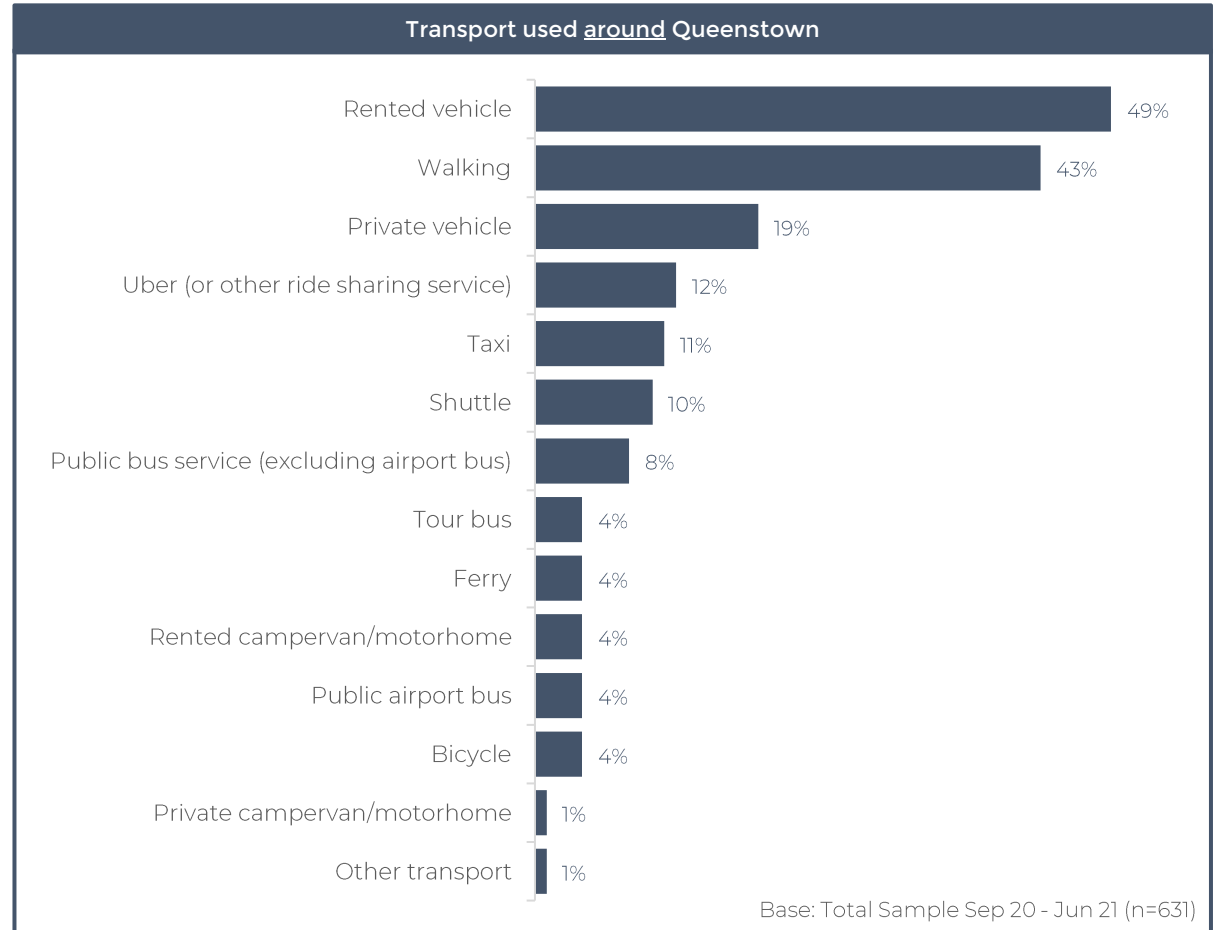


TRANSPORT

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	68%
Private vehicle	18%
Rented vehicle	13%
Scheduled bus/shuttle service	1%
Other transport	0%
Base: Total Sample Sep 20 - Jun 21	n=631

78% of Aucklanders and 77% of Wellingtonians 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)

		Not at all satisfied											Extremely Satisfied	N/A
Sep 2020 – Jun 2021	n=	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	
Ease of walking around Queenstown	631	9.1	0%	0%	0%	1%	1%	1%	2%	5%	16%	18%	55%	0%
Ease of cycling around Queenstown *	23	8.9	0%	0%	0%	0%	0%	0%	9%	9%	17%	13%	52%	0%
Ease of finding your way around	631	8.9	0%	0%	0%	0%	1%	3%	3%	7%	19%	21%	45%	1%
Queenstown Airport passenger facilities	428	8.7	0%	0%	0%	1%	1%	2%	5%	10%	17%	21%	39%	4%
Ease of getting information about transport options	631	8.4	0%	0%	0%	1%	1%	4%	4%	8%	12%	8%	28%	33%
Ease of using public transport around Queenstown	631	8.0	0%	1%	0%	1%	2%	4%	3%	3%	4%	5%	19%	57%
Ease of driving around Queenstown	459	7.9	0%	1%	1%	2%	3%	6%	8%	14%	18%	14%	31%	2%
Ease of parking your vehicle	459	5.9	3%	3%	10%	7%	7%	12%	11%	10%	10%	7%	15%	4%

* 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%	4%	21%	21%	50%
Queenstown town centre/urban area is clean and tidy	8.9	0%	0%	0%	0%	1%	1%	2%	7%	23%	21%	43%
I feel/felt welcome in Queenstown	8.9	0%	0%	0%	0%	0%	4%	1%	8%	22%	19%	46%
Queenstown is managing tourism activity well	8.6	0%	0%	0%	0%	0%	5%	3%	11%	22%	20%	39%
I don't/didn't feel concerned about anti-social behaviour in Queenstown	8.6	1%	0%	0%	1%	0%	6%	3%	7%	21%	21%	41%
It is easy to get around Queenstown	8.6	0%	0%	0%	1%	1%	4%	4%	11%	20%	17%	41%
Queenstown cares about the environment	8.5	0%	0%	0%	1%	0%	7%	3%	11%	21%	18%	39%
It is easy to interact with local people in Queenstown	8.3	0%	0%	1%	1%	1%	11%	4%	8%	21%	16%	38%
Base: Total Sample Sep 20 – Jun 21	n=631											



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?

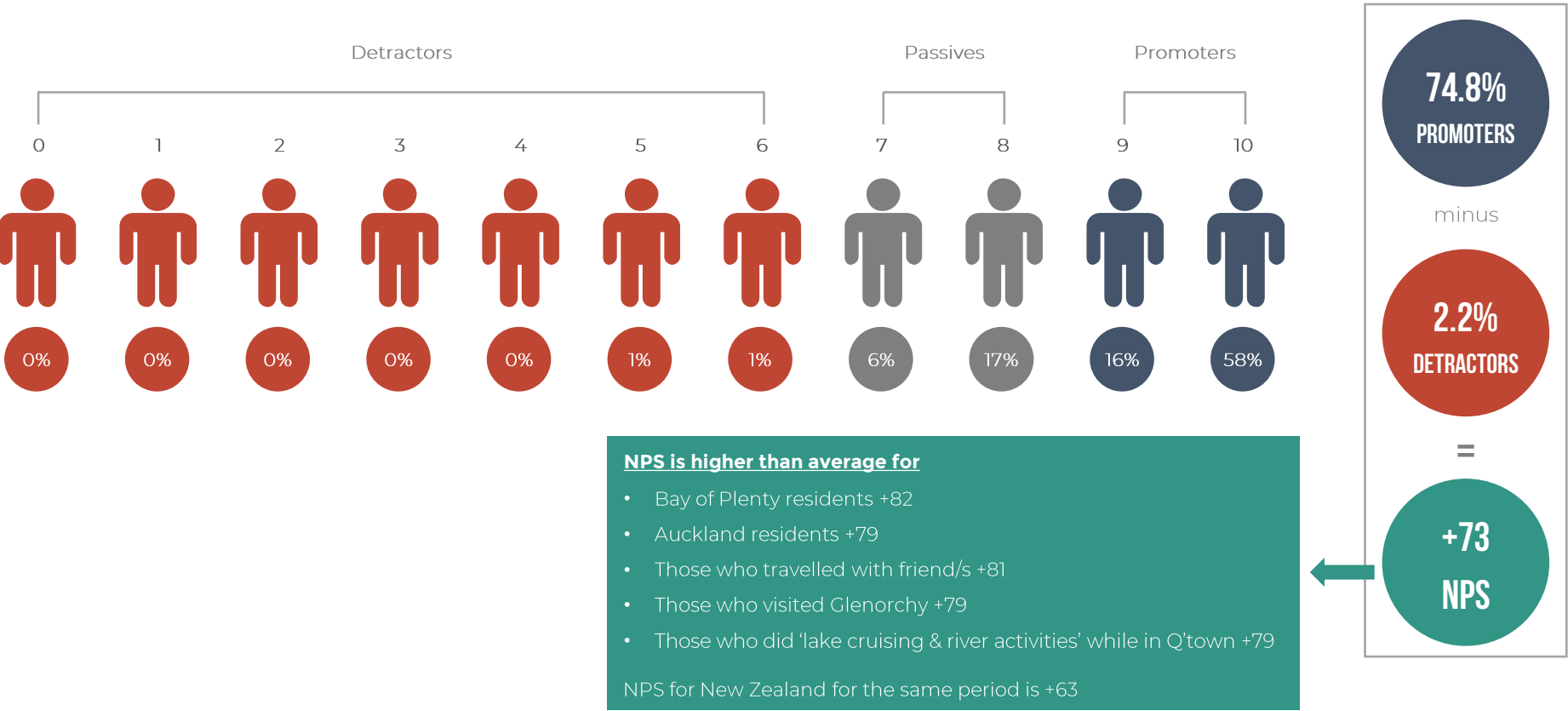
		Not at all satisfied											Extremely Satisfied	
	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	N/A	
The level of customer service experienced	8.7	0%	0%	0%	0%	0%	3%	3%	9%	22%	22%	40%	1%	
Availability of rubbish bins	8.5	0%	0%	1%	0%	1%	3%	5%	10%	21%	18%	36%	4%	
Availability of clean public toilets	8.4	0%	0%	0%	1%	1%	3%	4%	13%	18%	14%	32%	14%	
Availability of recycling bins	8.3	1%	0%	1%	1%	1%	5%	6%	10%	17%	14%	34%	9%	
Availability of Wi-Fi in public areas	7.9	0%	0%	1%	1%	1%	5%	5%	10%	11%	9%	20%	36%	
The value for money I experienced	7.2	1%	1%	2%	3%	3%	10%	11%	17%	20%	11%	20%	1%	
Overall experience in Queenstown	9.1	0%	0%	0%	0%	0%	1%	1%	5%	21%	24%	46%	1%	
Base: Total Sample Sep 20 - Jun 21	n=631													



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?

Opportunities for Improvement	
Pricing	9%
Car parking	7%
Traffic congestion and road works	4%
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%
Longer opening hours of stores and attractions	1%
Base: Total Sample Sep 20 - Jun 21	n=631

"More pedestrian streets and parking just outside the central city. Maybe electric scooters or a form of transport back to local accommodation?"

"More public toilets, better traffic management and more recycling bins"

"More information on all the different walking tracks that you can do for free"

"If we had booked our Milford sound flight/cruise with a different company we would have been able to go. TIC told us other companies had made the trip the morning our company cancelled the trip. We had put off organising other activities off for 2 days in hopes of making the trip - and were then unable to do other activities we wanted to."

"Not the best/easiest town to drive around especially in a campervan parking was always an issue and some cases had to pay up to \$10 and only wanted to park for 30min due to lack of parking especially campervan parking. They know a lot of campervans come here yet hardly any effort to cater for them."

"There was an awful lot of construction particularly road works going on which spoilt a bit of the ambience"

"More car parks nearer to the CBD. We needed to park quite far all the time to into CBD."

"Not hiking up the bus fare \$6 within a few months"



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	12%
Relaxing and quiet experiences	7%
Weather	4%
Atmosphere and vibe of Queenstown	4%
Walking and hiking	4%
Great service and friendly locals	3%
Variety of attractions and sites	3%
Spending time with family	3%
Ease of accessibility (e.g. getting around)	3%
Skyline (including gondola & luge)	2%
Wineries (& wine generally)	2%
Beautiful and clean township	2%
Helicopter tour	1%
Cycling and biking	1%
Sightseeing (generally)	1%
Jetboating	1%
Cruising (e.g. lake cruise)	1%
Base: Total Sample Sep 20 - Jun 21	n=631

"The walking trails. Very different environment to the Manawatu and lots of wicked scenic lookout spots."

"The slower pace of life and beautiful scenes every time you turned"

"The people, how easy it was to get around and also the many things to do/see"

"Despite the aftermath of Covid Lockdown Level 4, the locals are still making such an effort to persevere which is wonderful to see. It is sad to see some business have folded. I've visited pre-Covid and found it too congested - it was nice to walk around and not experience the overwhelming buzz but I do hope Queenstown will return to what it once was."

"Love lugging. The staff are so welcoming and friendly."

"We loved our helicopter ride to the glacier with Southern Lakes helicopters"

"Moke Lake loop walk and fine dining with brilliant service"

"The outdoors. Autumn colours and accessibility to cycle trails."

"Lots of shops and tourist activities! Very fun to walk around town"



SAMPLE PROFILE (NEW ZEALAND RESIDENTS)

Country of birth	
New Zealand	69%
Other country	31%
Region of residence	
Northland	3%
Auckland	38%
Waikato	9%
Bay of Plenty	8%
Gisborne	0%
Hawke's Bay	3%
Taranaki	1%
Manawatu-Wanganui	4%
Wellington (& Wairarapa)	16%
Tasman	0%
Nelson	1%
Marlborough	0%
West Coast	0%
Canterbury	10%
Otago	3%
Southland	3%
Base: Total Sample Sep 20 - Jun 21	
n=631	

Gender	
Male	47%
Female	53%
Gender Diverse	0%
Prefer not to say	0%
Age	
18-19 years	2%
20-24 years	9%
25-29 years	14%
30-34 years	13%
35-39 years	8%
40-44 years	10%
45-49 years	11%
50-54 years	12%
55-59 years	6%
60-64 years	6%
65-69 years	3%
70-74 years	3%
75+ years	1%
Base: Total Sample Sep 20 - Jun 21	
n=631	

