

QUEENSTOWN VISITOR SURVEY

2020/21 – Quarter 1



SUMMARY

MOTIVATORS TO VISIT

Most domestic visitors to Queenstown are travelling for a holiday or short break. Of those visitors, more than a quarter base their visit around a specific attraction or experience, most notably skiing in this first period of data collection. One in two visitors are motivated to visit Queenstown because of a desire to experience outstanding natural landscapes, to spend time with people special to them, and to undertake tourism activities. For just under one third of visitors experiencing adventure, a challenge, or excitement was important.

TRAVEL BEHAVIOUR

Domestic visitors' average length of stay in Queenstown is three nights, and two thirds stay less than five nights. For one in four domestic visitors it is their first time visiting, and almost half visit Queenstown only (i.e. without venturing to neighbouring regions). Within the region, two thirds visit Arrowtown as part of their trip and more than one quarter visit Glenorchy.

Almost half of visitors chose to stay in a hotel, with price and location key factors in choosing accommodation. Most visitors fly to Queenstown and more than half use a rental vehicle to get around.

The most popular experiences in Queenstown include visiting restaurants/cafes, shopping, sightseeing, going on walks, and visiting bars/nightclubs. One in five domestic visitors participate in an adrenaline activity. At least one third of visitors didn't do everything they wanted to during their visit.

SATISFACTION WITH VISITOR EXPERIENCE

Domestic visitors are generally very satisfied with their experience in Queenstown, especially with the ease of walking and finding their way around, and almost all feel safe and welcome. A key opportunity for improvement is carparking facilities – ratings and comments suggest parking was problematic for many. Pricing concerns were also frequently mentioned. Overall, visitors rated their experience in Queenstown highly though, at an average of 9.1 out of 10.

The Net Promoter Score for domestic visitors is +78. Higher NPS scores are evident for Aucklanders, and those on their first visit. Highlights that appear to be contributing to this high NPS score include Queenstown's scenery and the atmosphere of the destination.

BACKGROUND & METHODOLOGY

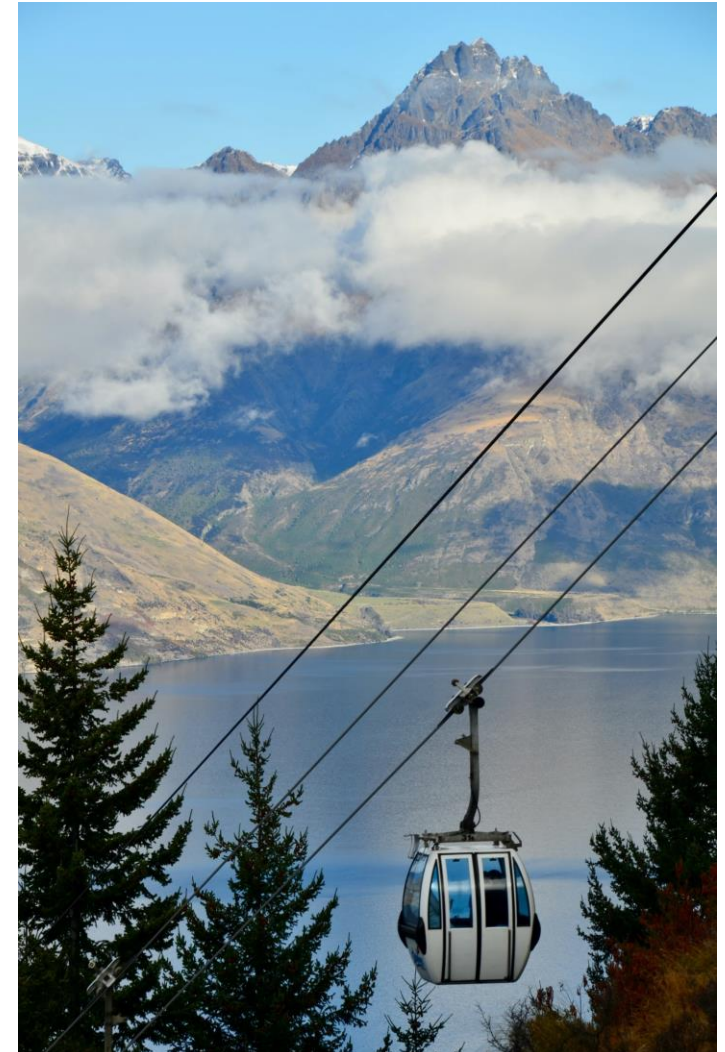
The Queenstown Visitor Survey (QVS) helps Destination Queenstown and members better understand the profile, travel behaviour, expectations and experiences of visitors to the Queenstown region.

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. 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	94%
Visit family or friends	3%
Attend a conference, convention, or other business event	1%
Other business reasons	1%
Attend event held by friends or family	1%
Attend event held by someone else	0%
Education/study	0%
Make transport connection/just passing through on way to somewhere else	0%
Other	0%

28% of visitors on holiday/vacation or a short break travelled to Queenstown to see/do a specific attraction or experience, which included....



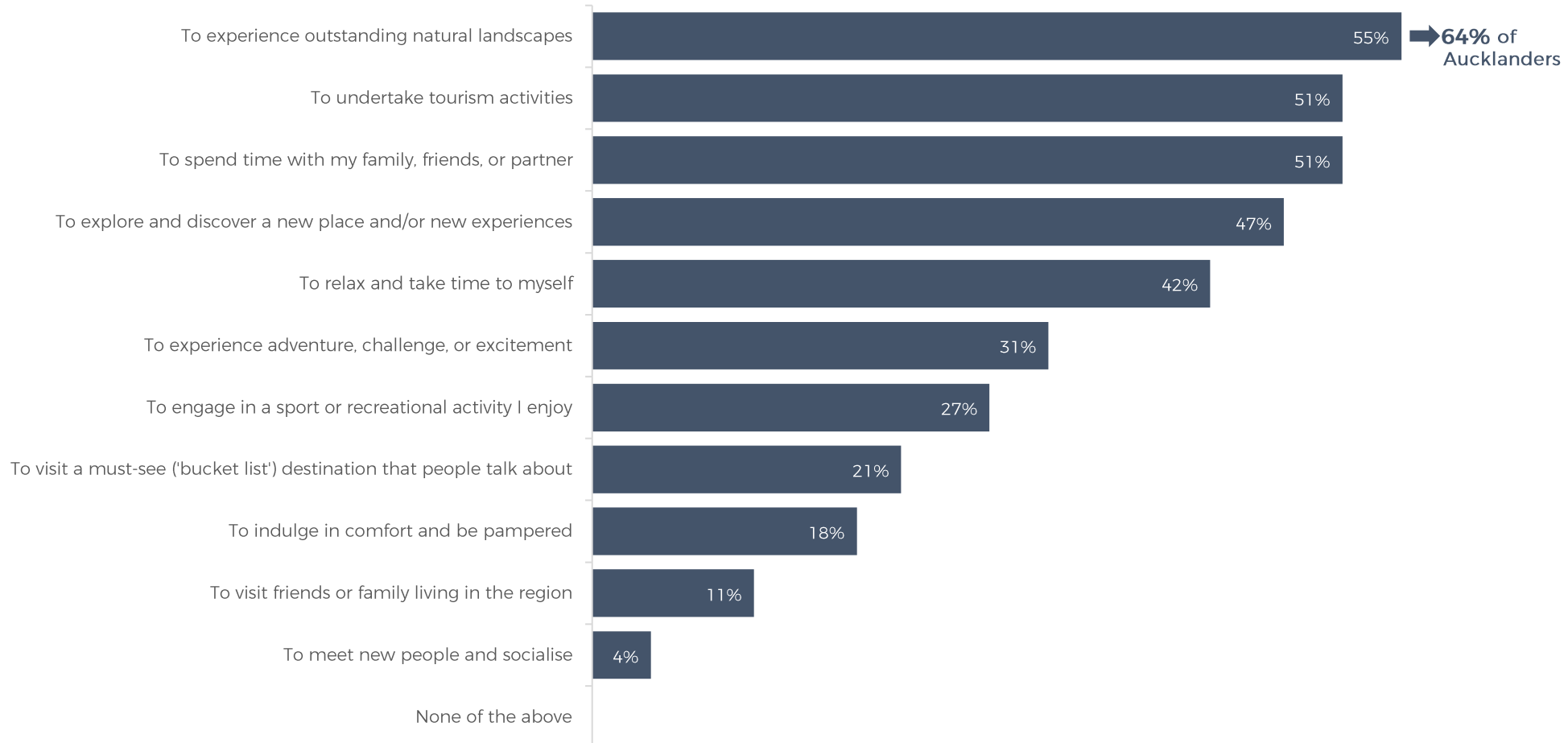
Note: small sample size (n=42)

Base: Total Sample n=157



VISIT MOTIVATORS

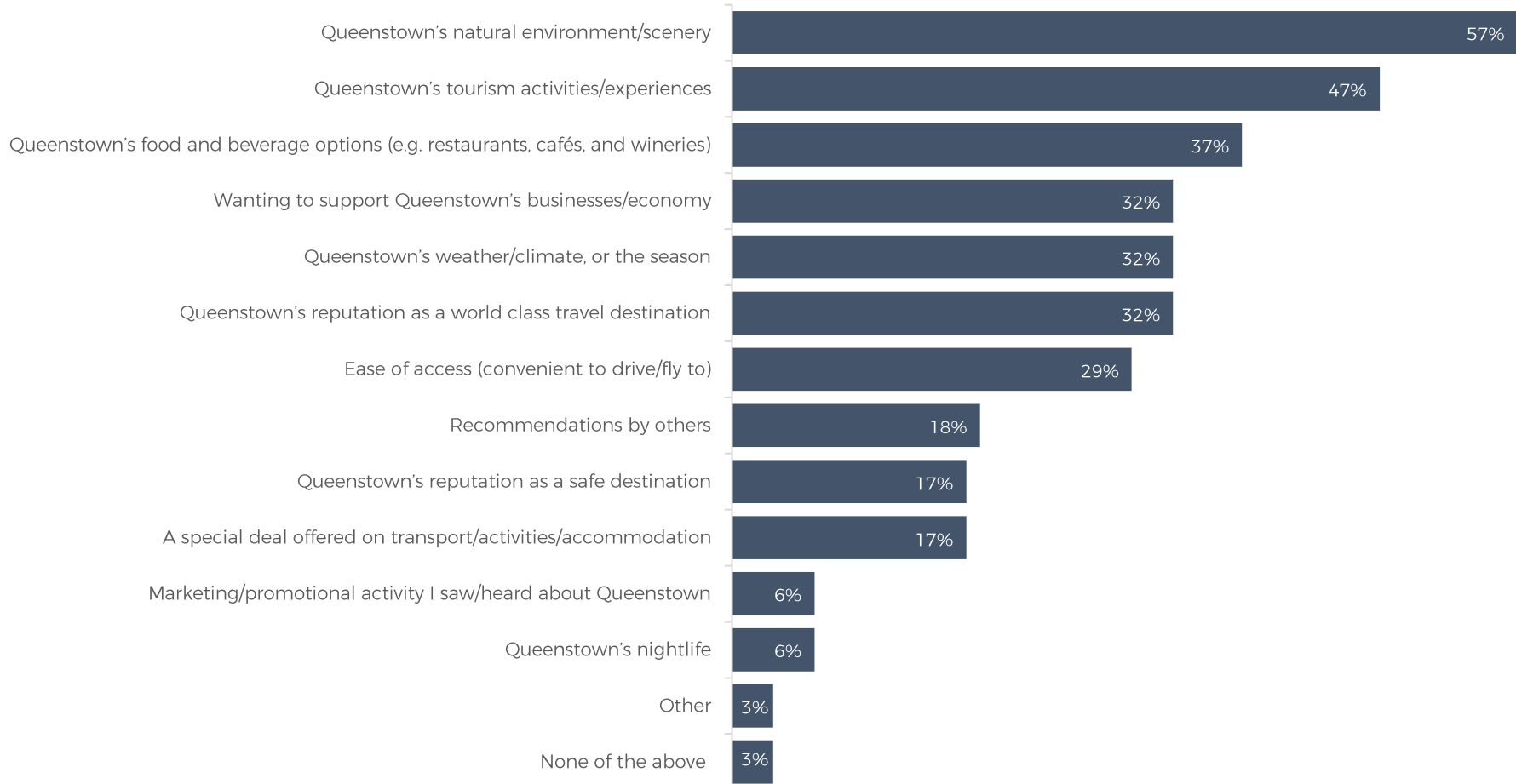
And which, if any, of the following do/did you want from your visit to Queenstown?





DESTINATION DECISION DRIVERS

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



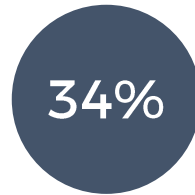


DESTINATION EXPERIENCE & DISPERSAL/FLOWS

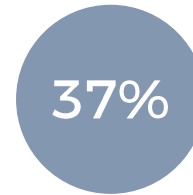
How many times have you visited Queenstown?
What locations have you visited, or did you visit, on your trip to Queenstown?
And what New Zealand locations outside of Queenstown have you visited, did you visit, or do you intend to visit, as part of your trip?



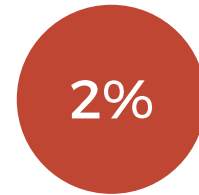
First visit to Queenstown



Visited **once/few** times



Visited **many** times



Used to live in Queenstown

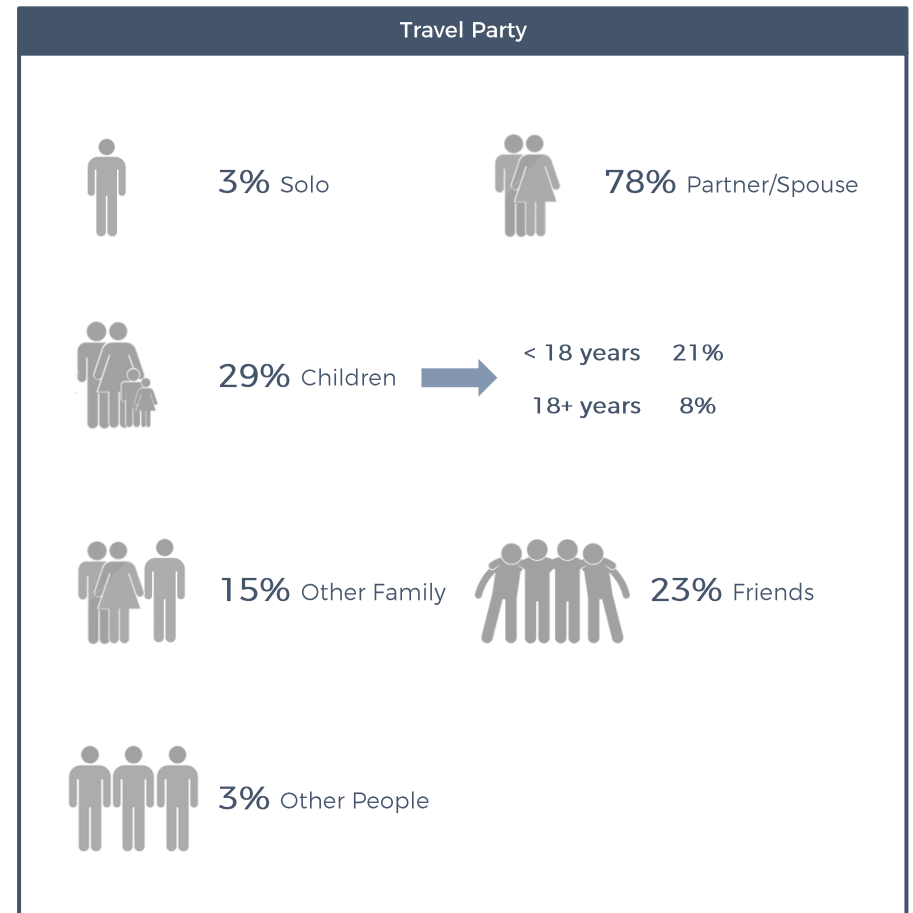
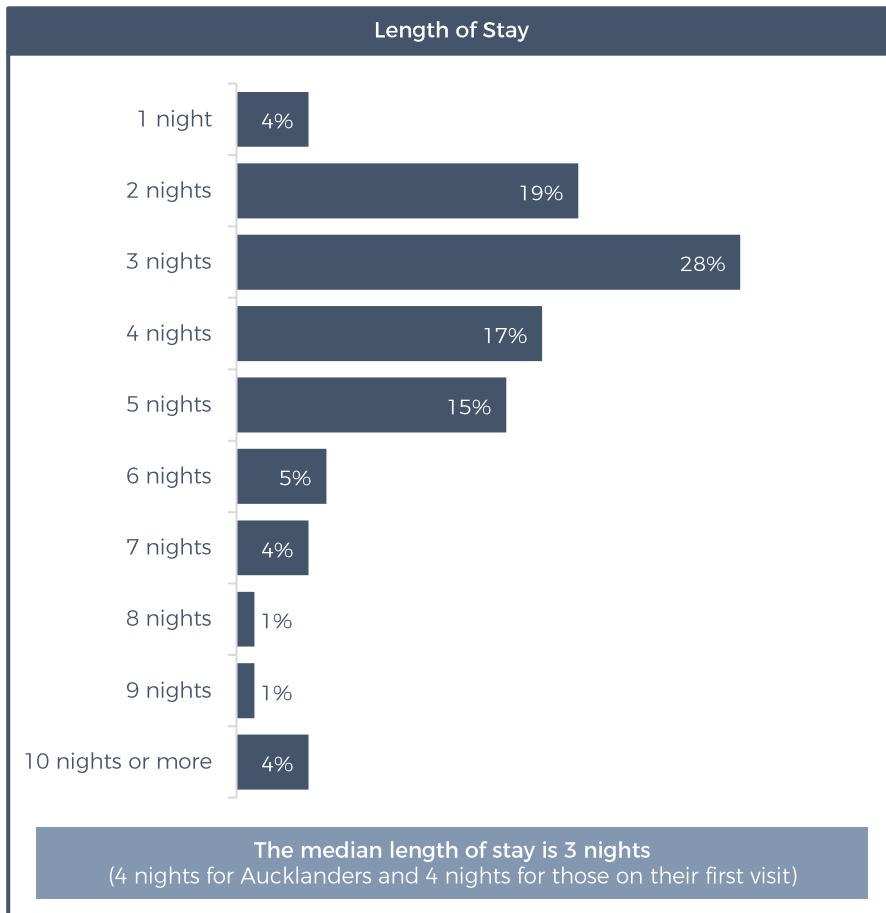
Dispersal within QZN region	
Queenstown town centre	92%
Queenstown urban area	52%
Arrowtown	66%
Lake Hayes	32%
Glenorchy	29%
Cardrona	29%
Gibbston Valley	27%
Kelvin Heights/Kelvin Peninsula	15%
Kingston	13%
Other	4%
Base: Total Sample	n=157

➔ **17%**
QZN town/urban
area only

Other regions visited	
None – Queenstown region only	45%
Wanaka	41%
Other location(s) in Otago outside of Queenstown and Wanaka (including Dunedin)	12%
Milford Sound	15%
Other location(s) in Fiordland outside of Milford Sound (including Te Anau)	8%
West Coast	4%
Canterbury (including Christchurch)	10%
Southland (including Invercargill)	7%
Other South Island region(s)	3%
Other North Island region(s)	1%
Base: Total Sample	n=157

LENGTH OF STAY / TRAVEL COMPANIONS

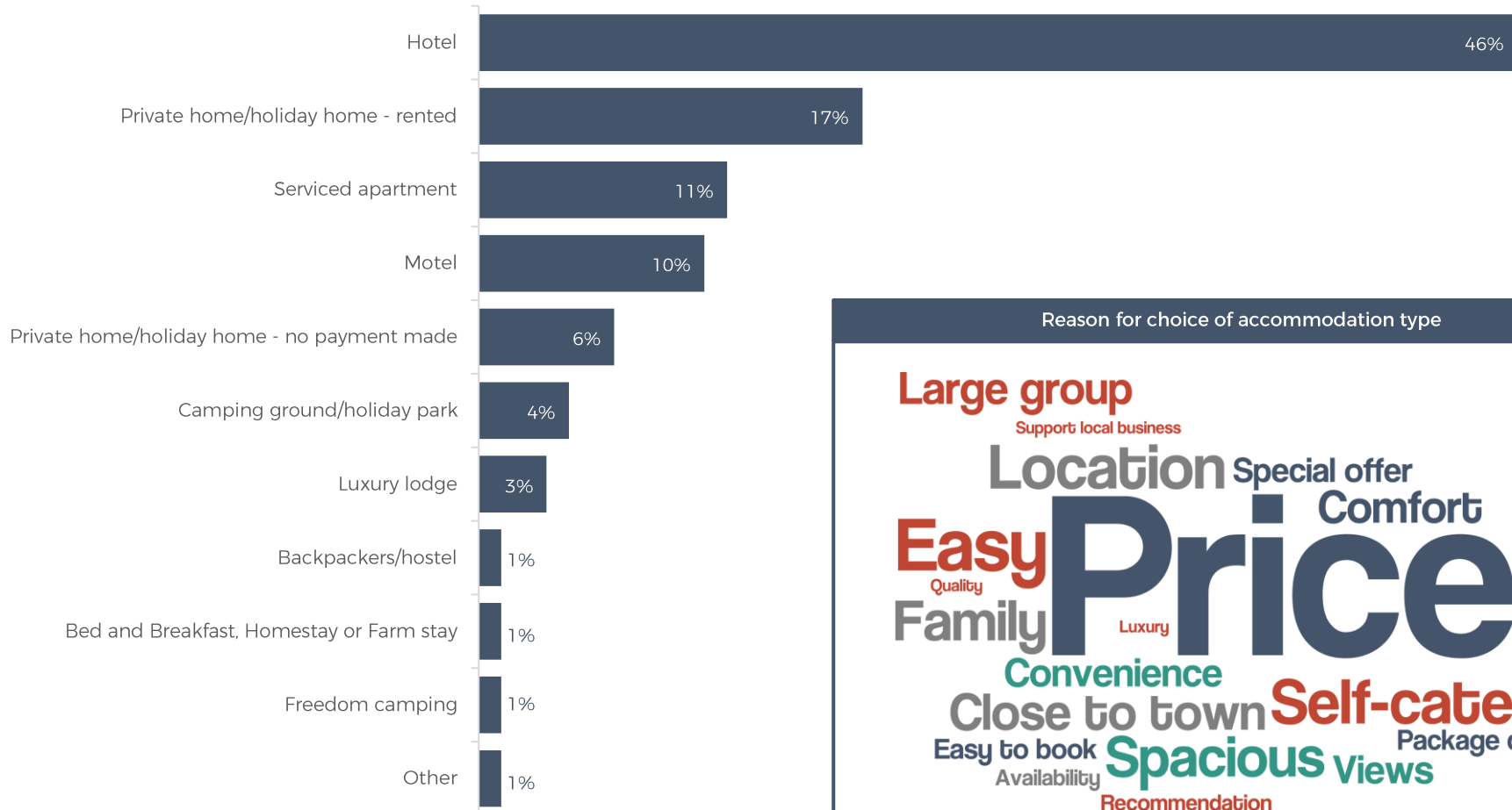
How many nights in total do you intend to stay, or did you stay, in Queenstown?
Who travelled/is travelling with you?





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?

Hotel



Private Home/Holiday Home - rented



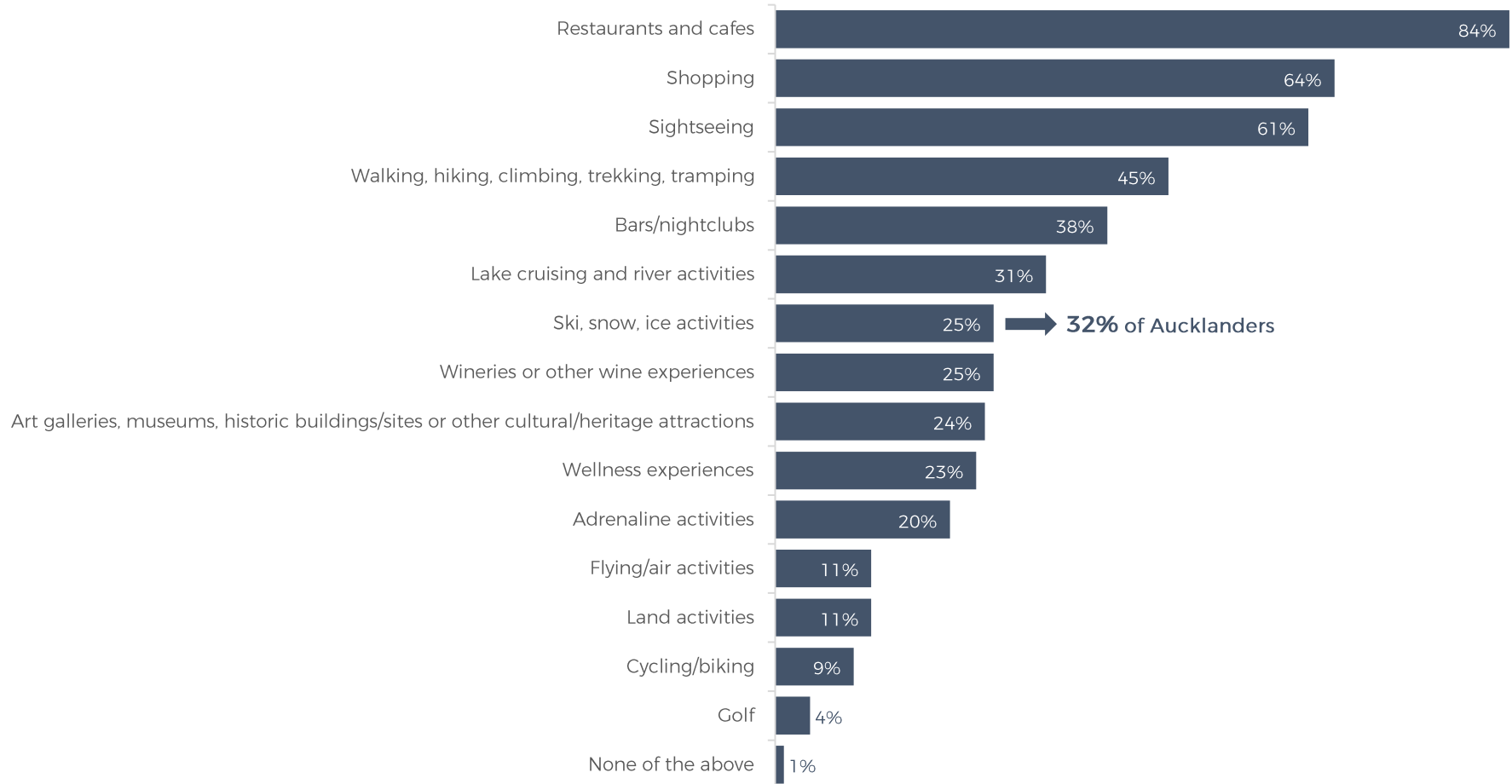
Serviced Apartment





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?)

35% mentioned an activity or attraction they would have liked to visit/experience.

A wide variety of activities and experiences were mentioned but most commonly it was Skyline Queenstown or Shotover Jet/a jet boat ride.

"The Gondola and luge, the Shotover Jet. The Shotover seemed closed when we went there, cost was expensive with a child. The Luge etc we decided to save until our daughter was a bit older."

"Milford cruise - snow blocking road on day booked"

"Snowboarding the Remarkables"

"Never managed to ski due to weather conditions"

"Hot pools were not available"

"Walking the track - Roy's peak, and doing the Milford flights. Couldn't do both as the weather wasn't good."

"Kayak dart river but it was too expensive"

"Would like to have gone on the steam boat. Wasn't that easy to find information on it down on the wharf."

"Go to Arrowtown but time was limited"

"Milford Sound - road closed. Bungy or Shotover jet - limited openings due to COVID"

"The gondola but couldn't get parking"

"I would have like to do a spa package but was all booked and didn't have time"

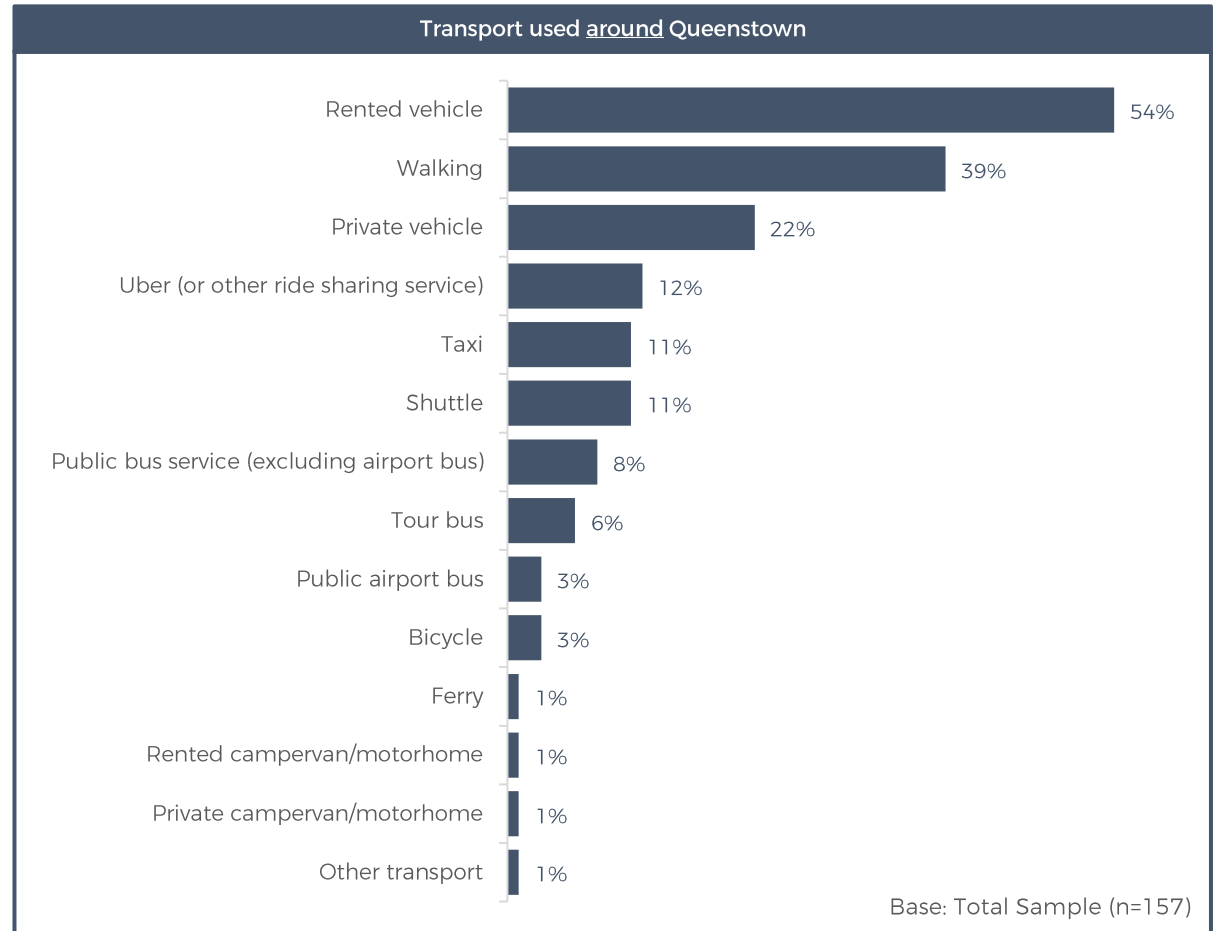


TRANSPORT

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	73%
Private vehicle	17%
Rented vehicle	9%
Scheduled bus/shuttle service	1%
Other transport	0%
Base: Total Sample	n=157

91% of Aucklanders travelled to Queenstown on a domestic flight compared to 63% 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	
	n=	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	N/A
Ease of walking around Queenstown	157	9.2	0%	0%	0%	2%	1%	0%	1%	4%	16%	18%	57%	1%
Ease of finding your way around	157	9.0	0%	0%	1%	0%	0%	1%	1%	8%	16%	20%	50%	2%
Queenstown Airport passenger facilities	115	8.8	0%	0%	0%	0%	1%	1%	6%	8%	17%	24%	36%	8%
Ease of cycling around Queenstown*	5	8.6	0%	0%	0%	0%	0%	0%	0%	20%	40%	0%	40%	0%
Ease of getting information about transport options	157	8.3	1%	0%	1%	1%	1%	4%	3%	6%	7%	5%	30%	41%
Ease of driving around Queenstown	119	8.1	0%	2%	0%	1%	3%	7%	8%	13%	19%	12%	36%	0%
Ease of using public transport around Queenstown	157	8.1	1%	1%	0%	1%	3%	2%	1%	3%	3%	3%	20%	62%
Ease of parking your vehicle	119	6.1	3%	2%	9%	8%	8%	10%	12%	10%	16%	4%	17%	2%

*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	9.2	0%	0%	0%	1%	0%	1%	1%	4%	17%	25%	52%
I feel/felt welcome in Queenstown	9.0	0%	1%	0%	0%	0%	3%	3%	4%	19%	20%	50%
Queenstown town centre/urban area is clean and tidy	9.0	0%	0%	1%	1%	1%	1%	1%	7%	20%	24%	46%
Queenstown is managing tourism activity well	8.8	0%	0%	0%	0%	0%	4%	3%	7%	21%	19%	45%
I don't/didn't feel concerned about anti-social behaviour in Queenstown	8.8	1%	0%	0%	1%	1%	5%	1%	6%	20%	21%	45%
it is easy to get around Queenstown	8.6	0%	0%	1%	2%	2%	3%	3%	9%	18%	14%	48%
Queenstown cares about the environment	8.6	1%	0%	0%	2%	1%	4%	3%	8%	20%	20%	41%
It is easy to interact with local people in Queenstown	8.4	0%	0%	1%	1%	1%	8%	4%	7%	20%	14%	43%
Base: Total Sample	n=157											



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?

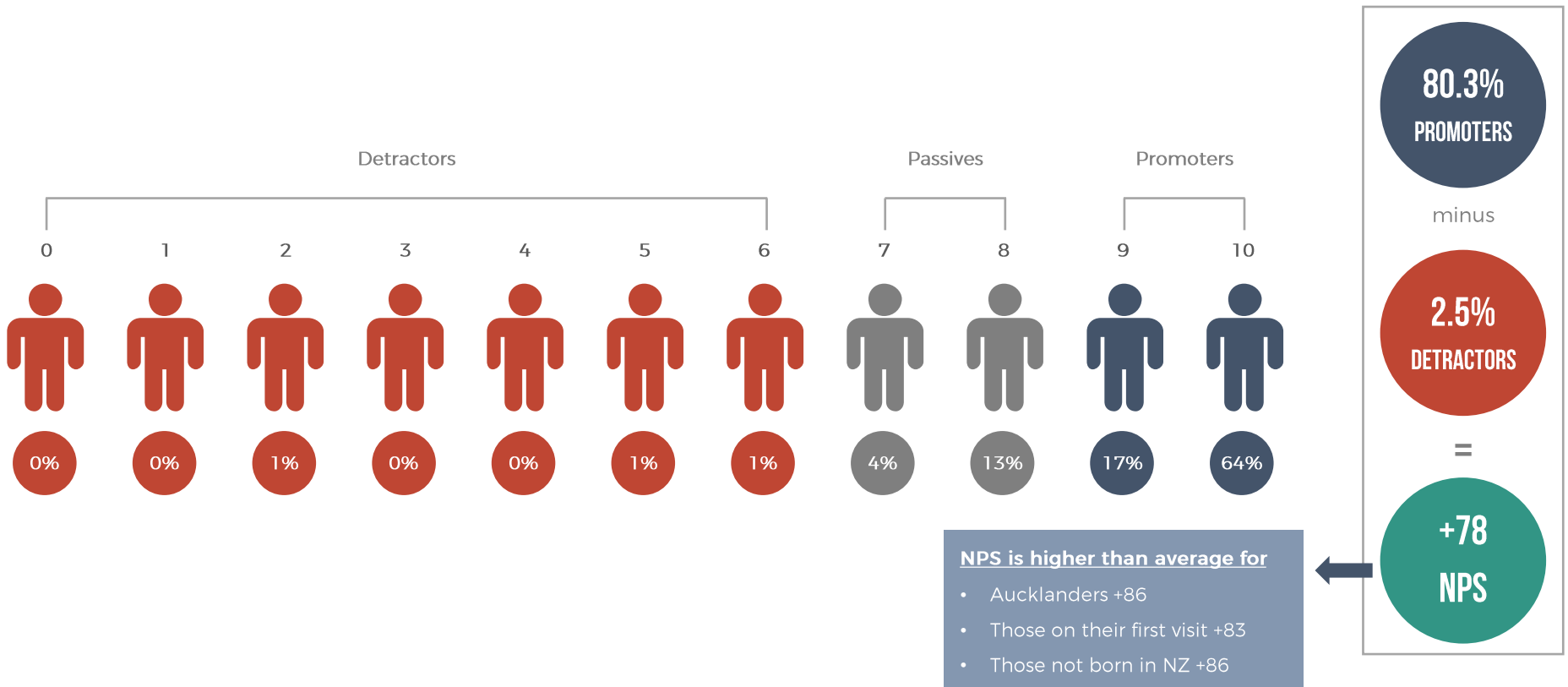
		Not at all satisfied											Extremely Satisfied	
	Average	(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	N/A	
The level of customer service experienced	8.8	1%	1%	0%	0%	0%	2%	3%	9%	18%	23%	43%	1%	
Availability of rubbish bins	8.5	0%	0%	1%	1%	1%	3%	6%	9%	19%	21%	36%	3%	
Availability of recycling bins	8.5	1%	0%	1%	1%	1%	3%	6%	9%	15%	20%	35%	10%	
Availability of clean public toilets	8.4	0%	0%	0%	1%	1%	4%	3%	16%	16%	12%	31%	16%	
Availability of Wi-Fi in public areas	7.9	1%	0%	0%	1%	1%	6%	6%	8%	4%	8%	18%	48%	
The value for money I experienced	7.2	0%	0%	4%	4%	3%	12%	11%	13%	21%	15%	16%	1%	
Overall experience in Queenstown	9.1	0%	0%	0%	0%	0%	1%	1%	5%	17%	27%	46%	1%	
Base: Total Sample	n=157													



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?

Comments about pricing and car parking were most common. These were largely constructive.

"Maps of the town centre"

"Cheaper carparking in town centre"

"Better signage for parking when you enter the city"

"Better management of traffic in Frankton especially on the main highway"

"Instructions on what can and can't be recycled in bins"

"Better priced activities they are still geared to the international tourist"

"Lack of quick parking (drop off points). The fact Brunswick Street was closed to traffic and no detour in place to hotels, smashed bottles up Brunswick Street, basically the whole area was a OSH hazard for pedestrians. Everything else was fantastic."

"Walking around town should be easier, especially to the hotels. I ... was walking there with my luggage during my trip. it was a hard walk when there was not many proper pedestrian crossing and pathways available from the town centre."

"A guide to the cheaper food and drink options, very expensive to go out"

"Parking issues in CBD to be resolved, e.g., park and ride, shuttles etc"

"I noticed some of your cobbled footpaths are very uneven lots of holes and trip hazards they need some maintenance"

"Food and activities are very expensive. We enjoyed everything we did and took advantage of specials or group deals but almost everything was much more expensive compared to similar activities in other parts of the country. I know a lot of people who would love Queenstown and the activities on offer but would not be able to afford it. The best value for money was the Time Tripper - the show was awesome and only cost \$30 for a family of 4."

"There are plenty of pub type food outlets, but a distinct lack of cafe coffee/food outlets. We walked and walked to find one, but only to find the queue was very long - obviously a need for cafe type food with good quality coffee."

HIGHLIGHTS

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

Comments about scenery/landscape, food and wine, and activities were most common. A further theme was that visitors felt relaxed and enjoyed spending time with family.

"Loved the cycle infrastructure. Great investment for the region and very well maintained. Excellent facility and please add more cycle options."

"Everything is so handy, and plenty to do. All with the beautiful Remarkables as a backdrop."

"We as a family had a great adventure in a beautiful setting. It was one of those rare weekends that was quieter than usual which was quite nice for us but not so much for Queenstown itself."

"Just walking around, having a coffee, go to the park, enjoy the atmosphere"

"It felt safe and relaxed, we had no issues wandering around in the evening with our 5 year old. She loved the buskers and playgrounds. So overall we liked it was kid friendly and also enjoyable for us adults."

"Everyone was very friendly and the environment was very clean and tidy"

"It's very relaxing and the crowd is just nice at the moment - not too crowded"

"Wineries, good food, and scenery. We brought friends who had never been to Queenstown and they loved it."

"The snow. It snowed more than we expected on the Monday and kids really enjoyed playing in the snow as its not something that happens in Palmy."

"Ease to get around, amazing scenery wherever you go"

"Friendly people, excellent service. I particularly enjoyed being a tourist in my own country strange though it may sound. I was particularly impressed with the public bus service and the cost of a trip."

"The Onsen hot pools and sight seeing"



SAMPLE PROFILE (NEW ZEALAND RESIDENTS)

Country of birth	
New Zealand	72%
Other country	28%
Region of residence	
Northland	5%
Auckland	36%
Waikato	6%
Bay of Plenty	7%
Gisborne	0%
Hawke's Bay	3%
Taranaki	2%
Manawatu-Wanganui	2%
Wellington (& Wairarapa)	18%
Tasman	1%
Nelson	1%
Marlborough	0%
West Coast	0%
Canterbury	12%
Otago	5%
Southland	4%
Base: Total Sample	n=157

Gender	
Male	43%
Female	56%
Gender Diverse	0%
Prefer not to say	1%
Age	
18-19 years	1%
20-24 years	10%
25-29 years	12%
30-34 years	11%
35-39 years	11%
40-44 years	7%
45-49 years	8%
50-54 years	12%
55-59 years	10%
60-64 years	6%
65-69 years	6%
70-74 years	3%
75+ years	1%
Base: Total Sample	n=157

