

QUEENSTOWN VISITOR SURVEY

2020/21 – Quarter 2 Update



SUMMARY

MOTIVATORS TO VISIT

The vast majority of domestic visitors to Queenstown travel to the region for a holiday/vacation or short break, and one third of this group travel to Queenstown to see or do a specific attraction or experience. In the most recent quarter, Skyline Queenstown was a popular drawcard.

Three in five visitors are motivated to visit Queenstown to experience outstanding natural landscapes, and half want to relax and take time to themselves. Queenstown's tourism activities and experiences and reputation as a world class travel destination are also important visitation drivers.

TRAVEL BEHAVIOUR

The average length of stay for domestic visitors is three nights, however 29 percent stay five nights or longer. Just under one third are visiting Queenstown for the first time and the majority of visitors are including a visit to at least one other region in their trip. Within the region, Arrowtown is the most commonly visited location outside of the main Queenstown town/urban area. Almost two thirds of visitors went to Arrowtown on their trip.

A domestic flight is the most common means of getting to Queenstown. Once in Queenstown a rented vehicle or walking are the most common methods of getting around. When choosing accommodation, price is the biggest factor, with location, family needs, and comfort other notable considerations.

Queenstown's most popular activities and experiences include restaurants/cafes, shopping, sightseeing, and walking/hiking. Almost two in five visitors were not able to do everything they wanted to during their visit. In the most recent quarter Shotover Jet/jet boat rides, skiing & snowboarding and visiting wineries were the most common activities visitors would like to have done but didn't.

SATISFACTION WITH VISITOR EXPERIENCE

Domestic visitors are generally very satisfied with their Queenstown experience, but car parking stands out as an area of frustration. Queenstown is also highly regarded as a safe, clean/tidy, and welcoming. Overall, visitors score their Queenstown experience an average 9.0 out of 10. Improvements to Wi-Fi availability, value for money, and ease of getting around Queenstown (driving or using public transport) would likely boost this further.

The Net Promoter Score (NPS) for domestic visitors is +72. NPS is higher than average amongst younger visitors and Aucklanders. Highlights of visitors' experiences commonly include Queenstown's scenery and landscapes, the variety of activities and attractions and the food and wine offerings.

BACKGROUND & METHODOLOGY

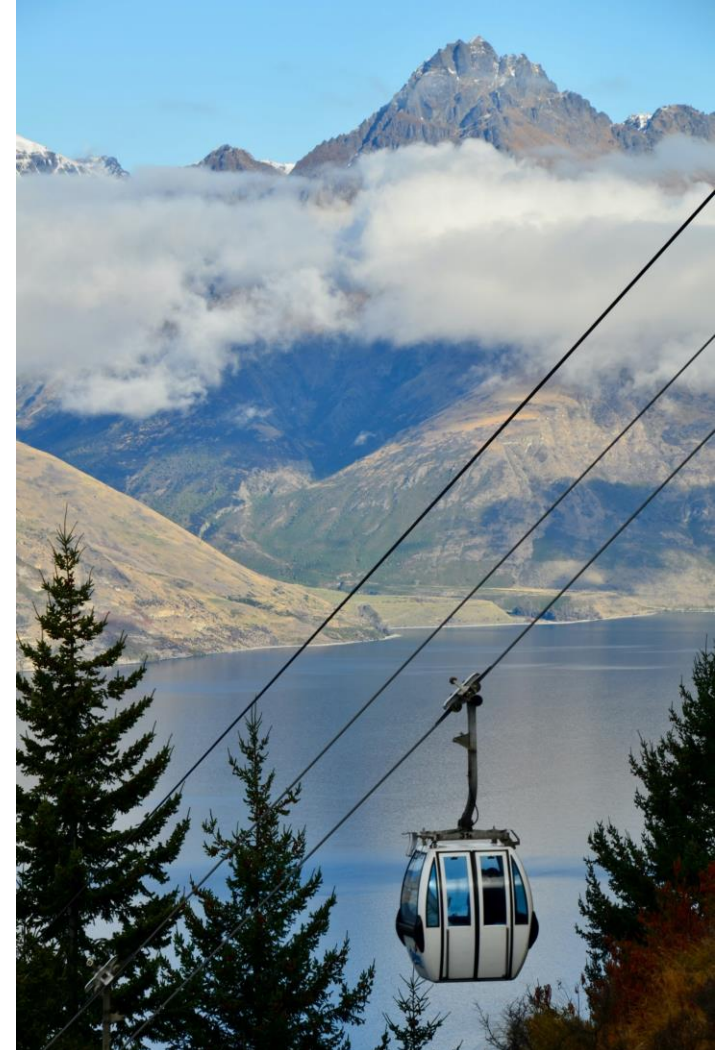
The Queenstown Visitor Survey (QVS) helps Destination Queenstown and members better understand the profile, travel behaviour, expectations and experiences of visitors to the Queenstown region.

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 – December 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 | 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% |

→ **31%** of visitors on holiday/vacation or a short break travelled to Queenstown to see/do a specific attraction or experience, which included....

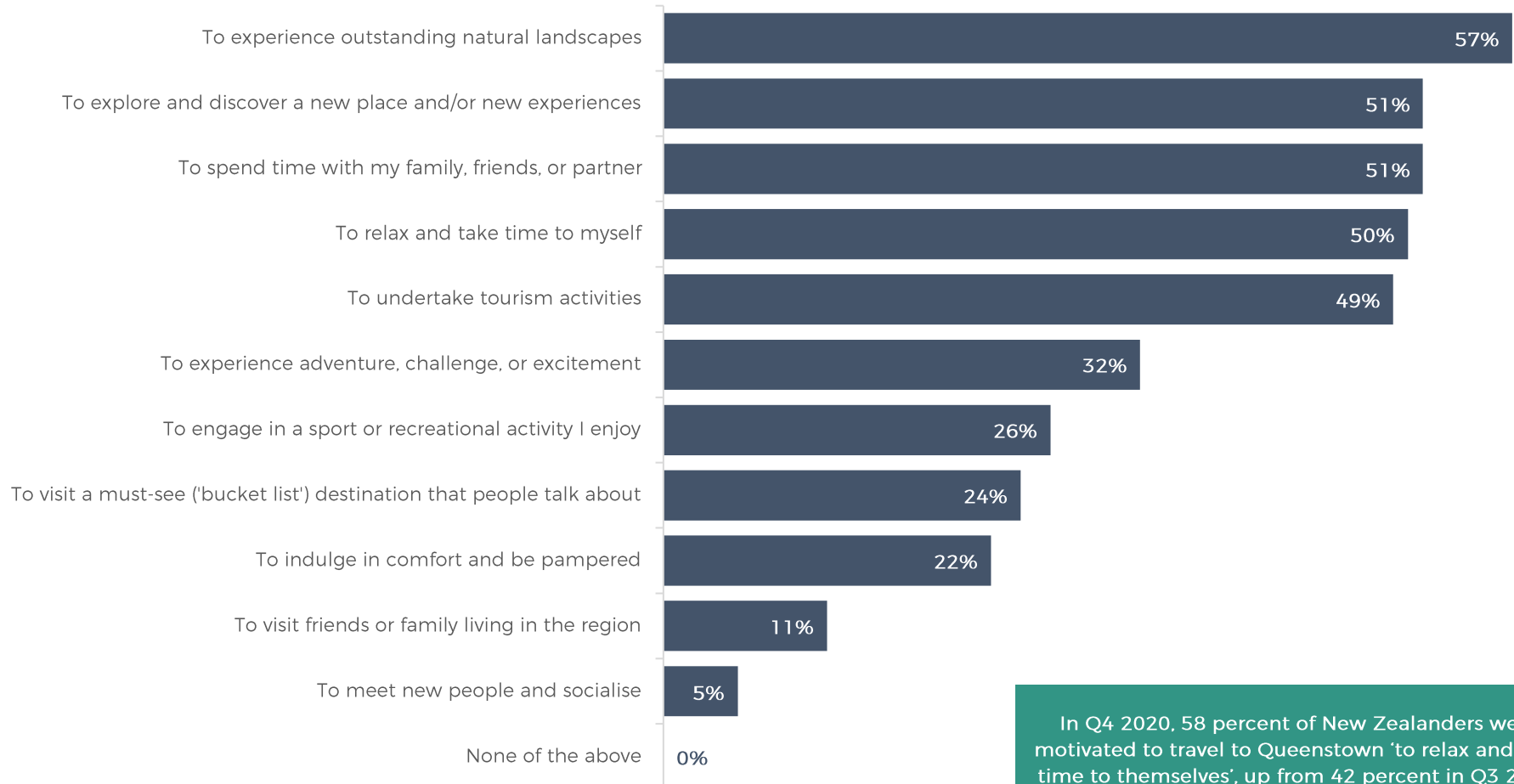


Base: Total Sample Sep-Dec 2020 n=323



VISIT MOTIVATORS

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

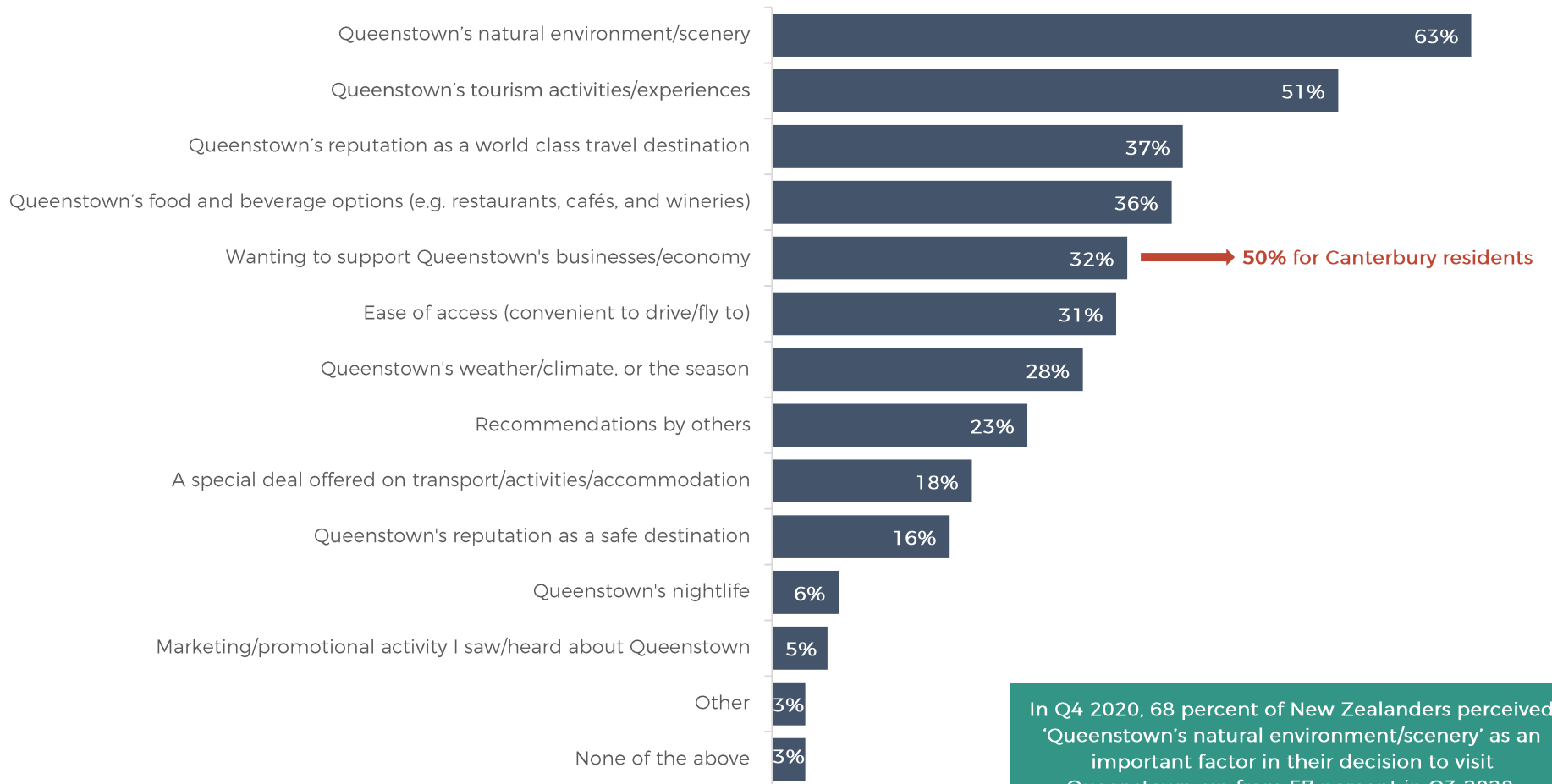


In Q4 2020, 58 percent of New Zealanders were motivated to travel to Queenstown 'to relax and take time to themselves', up from 42 percent in Q3 2020.



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?



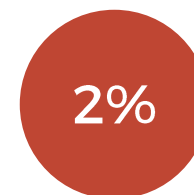
First visit to Queenstown



Visited **once/few times**



Visited **many times**



Used to live in Queenstown

| Dispersal within QZN region | |
|---------------------------------------|-----|
| Queenstown town centre | 91% |
| Queenstown urban area | 52% |
| Arrowtown | 63% |
| Cardrona | 28% |
| Lake Hayes | 27% |
| Glenorchy | 26% |
| Gibbston Valley | 23% |
| Kingston | 12% |
| Kelvin Heights/Kelvin Peninsula | 12% |
| Other | 3% |
| Base: Total Sample Sep-Dec 2020 n=323 | |

→ **20% QZN town or urban area only**

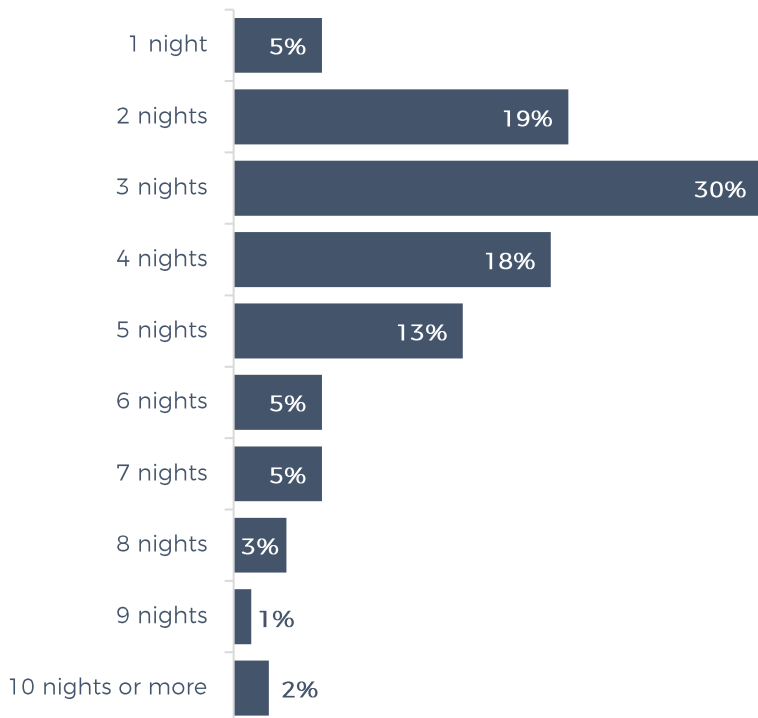
| Other regions visited | |
|---|-----|
| None – Queenstown region only | 42% |
| Wanaka | 44% |
| Other location(s) in Otago outside of Queenstown and Wanaka (including Dunedin) | 12% |
| Milford Sound | 21% |
| Other location(s) in Fiordland outside of Milford Sound (including Te Anau) | 13% |
| Canterbury (including Christchurch) | 12% |
| Southland (including Invercargill) | 8% |
| West Coast | 6% |
| Other South Island region(s) | 7% |
| Other North Island region(s) | 3% |
| Base: Total Sample Sep-Dec 2020 n=323 | |



LENGTH OF STAY / TRAVEL COMPANIONS

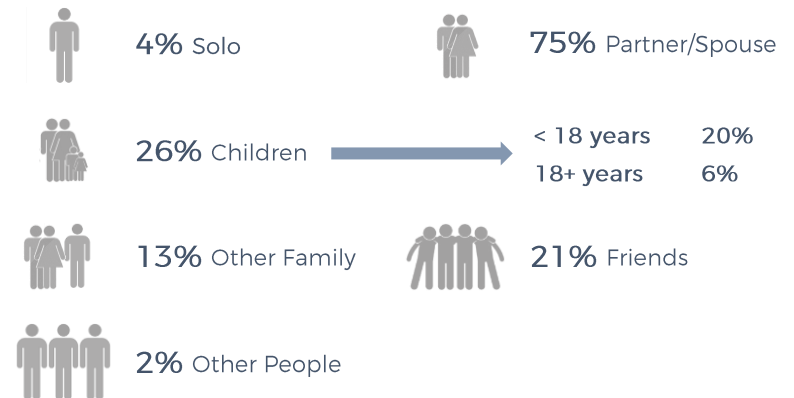
How many nights in total do you intend to stay, or did you stay, in Queenstown?
Who travelled/is travelling with you?

Length of Stay



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

Travel Party



Group types



- 4% Travelling alone
- 43% Couples only
- 73% Family groups (incl. couples) only*
- 23% Family groups with children only**
- 9% Friends only

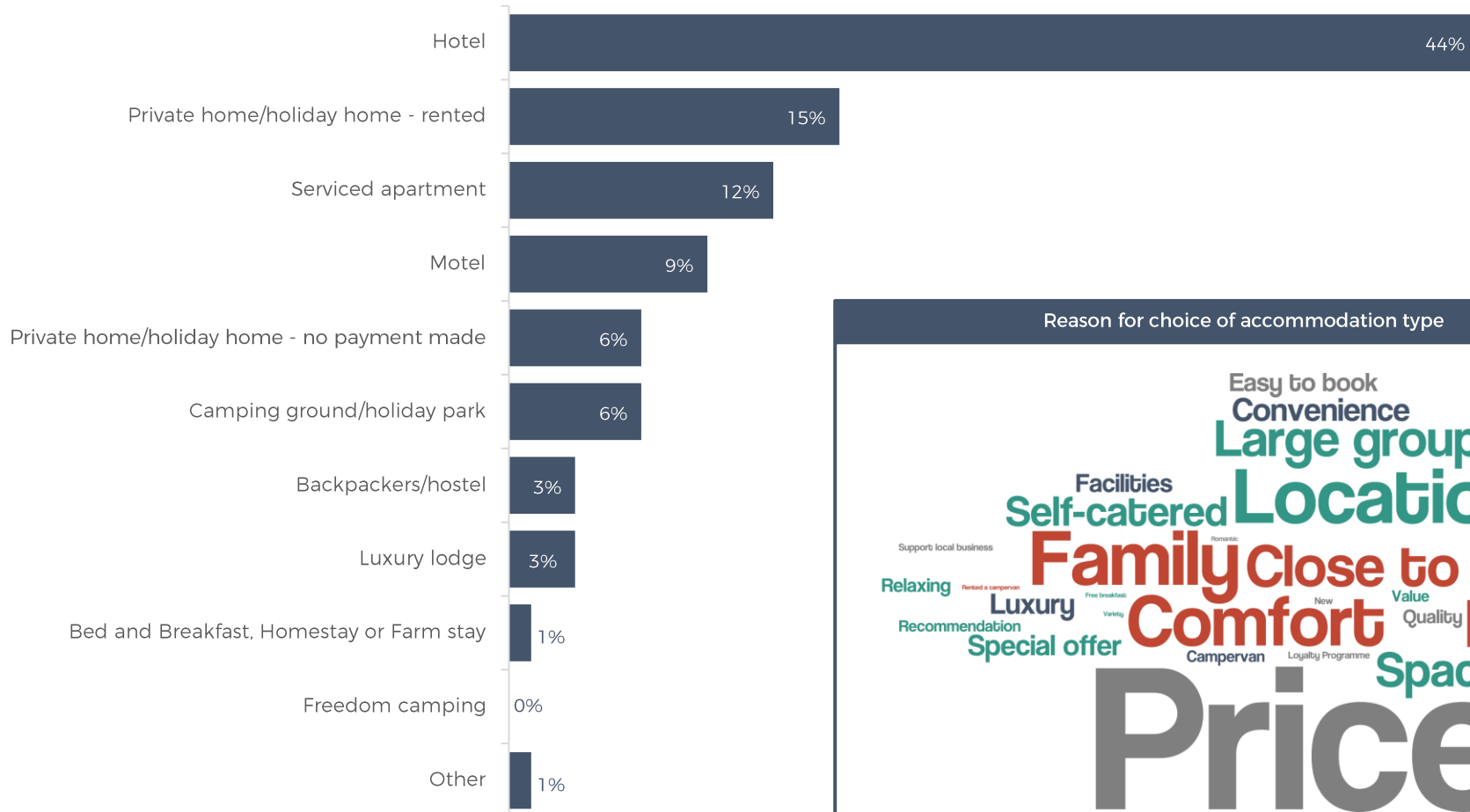
* Respondent travelled with any of their partner/spouse, children of any age and/or other family members but no others

** 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



Word cloud for Hotel accommodation. The most prominent words are 'Comfort', 'Location', 'Price', 'Ease', 'Views', 'Convenience', 'Close to town', 'Relaxing', 'Special offer', 'Luxury', 'Package', 'Recommendation', 'Availability', and 'Stayed there previously'.

Private Home/Holiday Home - rented



Word cloud for Private Home/Holiday Home - rented accommodation. The most prominent words are 'Price', 'Spacious', 'Large group', 'Family', 'Easy to book', 'Self-catered', 'Location', 'Value for money', 'Facilities', 'Close to town', 'Availability', 'Supports local business', 'Privacy', 'Comfort', 'Ease', 'Recommendation', 'Easy', and 'Quality'.

Serviced Apartment

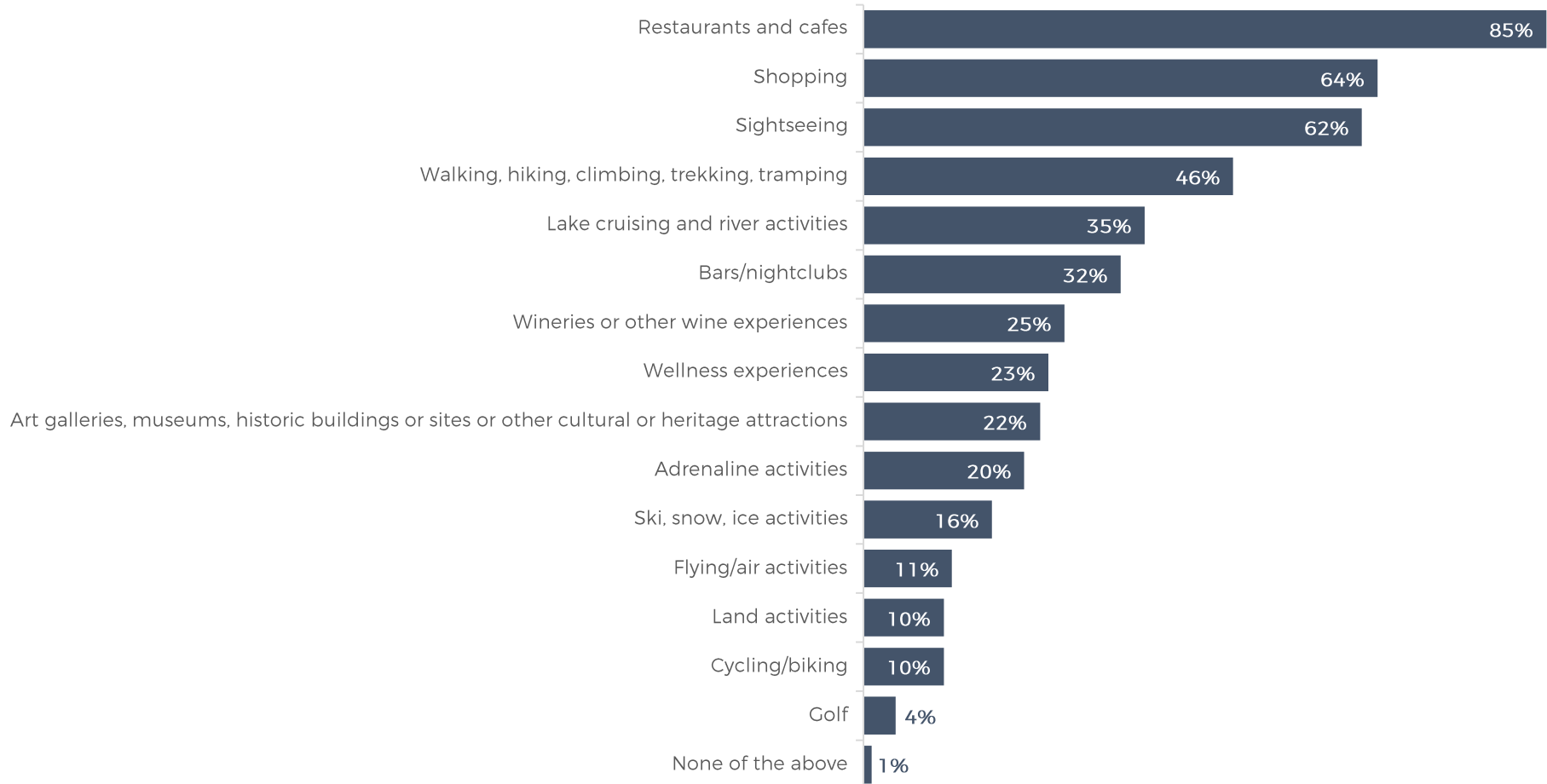


Word cloud for Serviced Apartment accommodation. The most prominent words are 'Family', 'Spacious', 'Self-catered', 'Facilities', 'Close to town', 'Large group', 'Price', and 'Comfort'.



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?)

38% mentioned an activity or attraction they would have liked to visit/experience.

A range of activities and experiences were noted. In Q4 2020 specifically, the Shotover Jet/jet boat rides, skiing & snowboarding and wineries were most common.

"Jet boating would have been good, but too pricey"

"Get to Wanaka, Arrowtown for sightseeing, and Cardrona for skiing. More time for biking around Queenstown and kayaking"

"Have done most of the things on the list but would be cool to come in winter with more snow"

"Wineries - did not know which were family friendly, lake cruise - could not find shorter options that 3.5 hours, horse riding - could not find options with details. We also had time constraints."

"Helicopter flight for sight seeing"

"The shark boats and canyon swing because they look fun! Couldn't do due to price or pregnancy."

"Rees Dart track - cant do full loop track at present"

"Lake Wakatipu and/or cruise on the lake - not enough time"

"Would like to do more experiences and day trips but were only here overnight and had a limited budget"

"Mountains - skiing etc (the Remarkables)"

"Paragliding, shark jet, helicopter"

"Shotover jet - it was closed on the day we went"

"Whitewater rafting. too cold this time of year. Cardrona trikes. only during summer"

"Wine tours, flight to Mt Aspiring, some adventure sport"

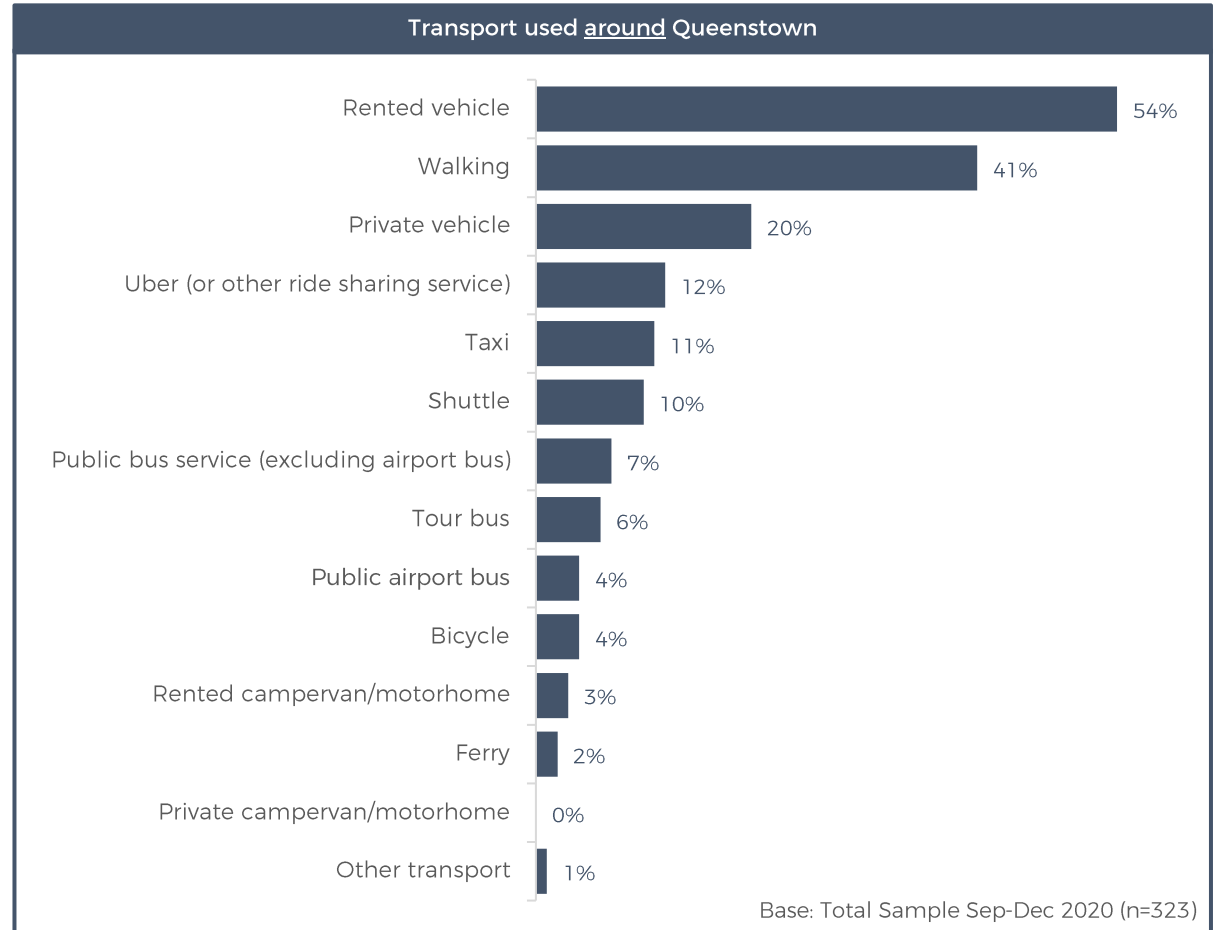


TRANSPORT

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 | 72% |
| Private vehicle | 15% |
| Rented vehicle | 13% |
| Scheduled bus/shuttle service | 1% |
| Other transport | 0% |
| Base: Total Sample Sep-Dec 2020 | n=323 |

81% of Aucklanders travelled to Queenstown on a domestic flight compared to 66% 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-Dec 2020 | n= | Average | (0) | (1) | (2) | (3) | (4) | (5) | (6) | (7) | (8) | (9) | (10) | N/A |
| Ease of walking around Queenstown | 323 | 9.1 | 0% | 0% | 0% | 1% | 1% | 1% | 2% | 4% | 15% | 19% | 57% | 0% |
| Ease of cycling around Queenstown * | 14 | 9.0 | 0% | 0% | 0% | 0% | 0% | 0% | 7% | 7% | 21% | 7% | 57% | 0% |
| Ease of finding your way around | 323 | 8.9 | 0% | 0% | 1% | 0% | 0% | 3% | 2% | 7% | 19% | 20% | 48% | 1% |
| Queenstown Airport passenger facilities | 231 | 8.6 | 0% | 0% | 0% | 1% | 1% | 2% | 6% | 9% | 17% | 22% | 36% | 5% |
| Ease of getting information about transport options | 323 | 8.4 | 0% | 0% | 1% | 1% | 1% | 3% | 5% | 7% | 11% | 7% | 28% | 37% |
| Ease of using public transport around Queenstown | 323 | 8.0 | 0% | 1% | 0% | 1% | 3% | 3% | 2% | 3% | 5% | 3% | 19% | 59% |
| Ease of driving around Queenstown | 243 | 8.0 | 0% | 1% | 0% | 2% | 2% | 7% | 8% | 12% | 20% | 13% | 34% | 0% |
| Ease of parking your vehicle | 243 | 5.9 | 5% | 3% | 9% | 7% | 9% | 11% | 10% | 9% | 13% | 6% | 16% | 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 | 9.1 | 0% | 0% | 0% | 0% | 0% | 2% | 1% | 6% | 19% | 21% | 52% |
| Queenstown town centre/urban area is clean and tidy | 8.9 | 0% | 0% | 1% | 0% | 1% | 1% | 1% | 7% | 22% | 23% | 45% |
| I feel/felt welcome in Queenstown | 8.9 | 0% | 1% | 0% | 0% | 0% | 4% | 2% | 7% | 21% | 17% | 48% |
| Queenstown is managing tourism activity well | 8.7 | 0% | 0% | 0% | 1% | 0% | 5% | 2% | 10% | 23% | 18% | 41% |
| I don't/didn't feel concerned about anti-social behaviour in Queenstown | 8.6 | 0% | 0% | 0% | 1% | 1% | 6% | 2% | 8% | 20% | 20% | 42% |
| Queenstown cares about the environment | 8.6 | 0% | 0% | 0% | 1% | 0% | 5% | 2% | 11% | 21% | 18% | 41% |
| It is easy to get around Queenstown | 8.6 | 1% | 0% | 0% | 2% | 2% | 3% | 3% | 9% | 21% | 15% | 44% |
| It is easy to interact with local people in Queenstown | 8.4 | 0% | 0% | 1% | 2% | 1% | 9% | 3% | 9% | 20% | 15% | 42% |
| Base: Total Sample Sep-Dec 2020 | n=323 | | | | | | | | | | | |



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?

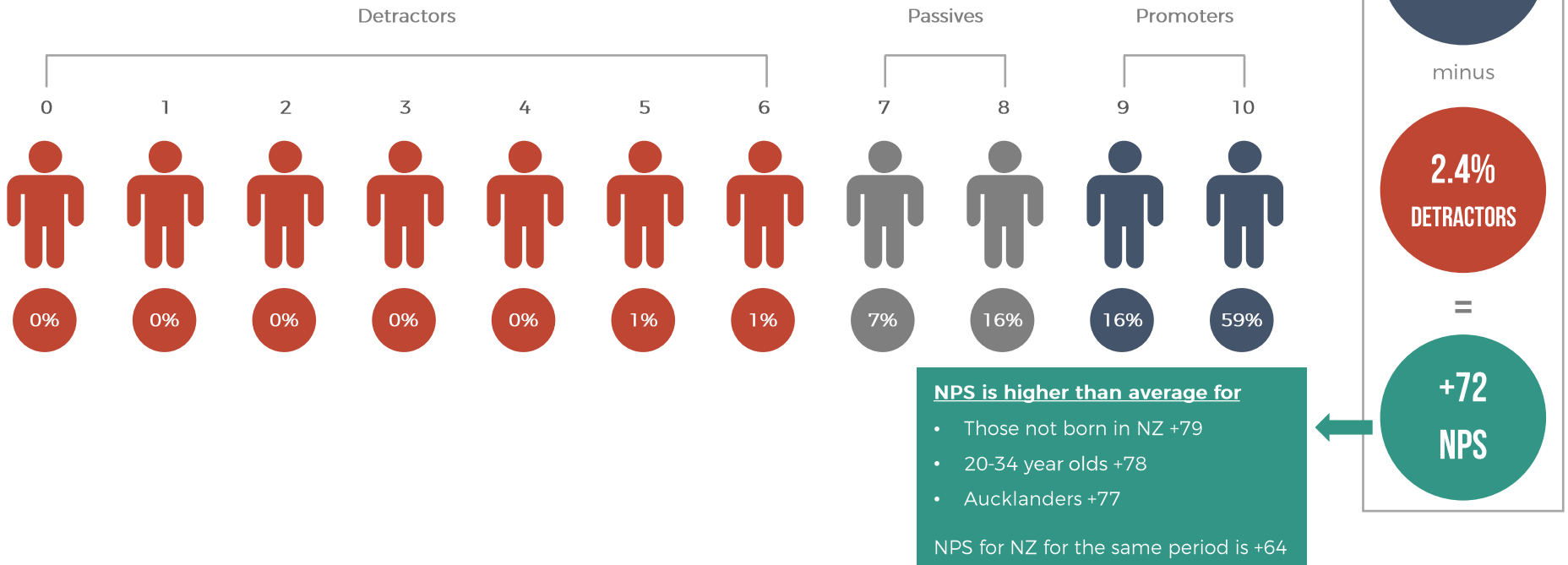
| | | Not at all satisfied | | | | | | | | | | Extremely Satisfied | |
|---|---------|----------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|---------------------|-----|
| | Average | (0) | (1) | (2) | (3) | (4) | (5) | (6) | (7) | (8) | (9) | (10) | N/A |
| The level of customer service experienced | 8.7 | 0% | 0% | 0% | 0% | 0% | 3% | 3% | 8% | 23% | 21% | 39% | 2% |
| Availability of rubbish bins | 8.4 | 0% | 0% | 1% | 1% | 1% | 4% | 6% | 10% | 21% | 18% | 36% | 4% |
| Availability of clean public toilets | 8.3 | 0% | 0% | 0% | 2% | 1% | 3% | 3% | 15% | 19% | 11% | 29% | 16% |
| Availability of recycling bins | 8.3 | 0% | 0% | 1% | 1% | 2% | 6% | 7% | 8% | 16% | 15% | 34% | 9% |
| Availability of Wi-Fi in public areas | 7.9 | 1% | 0% | 1% | 1% | 1% | 4% | 5% | 8% | 9% | 9% | 18% | 43% |
| The value for money I experienced | 7.2 | 1% | 1% | 3% | 4% | 3% | 10% | 11% | 15% | 20% | 12% | 18% | 2% |
| Overall experience in Queenstown | 9.0 | 0% | 0% | 0% | 0% | 0% | 1% | 1% | 7% | 21% | 24% | 44% | 2% |
| Base: Total Sample Sep-Dec 2020 | n=323 | | | | | | | | | | | | |



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 Q4 2020, several suggestions concerning affordability and car parking were noted.

"I would recommend all surrounding areas. I think Queenstown itself has developed too quickly and is very ugly. I think the centre of Queenstown is dirty, the shops are mostly unappealing, too many fast food restaurants. such a tragedy."

"There are so many different activities etc that you can participate in in Queenstown, however a lot is costly. I think some sort of package or discount for a group of activities would be beneficial for tourists as they will then be more likely to participate in such activities (and more)."

"Something that reflects a large population of people that visit. Example - something that reflects Pacifica culture (signs with greetings or pictures of Pasifika people/art/culture). Something small."

"Better maps available"

"Ease of transport to mountains etc."

"Free internet in Novotel Hotel. Having to pay for Wi-Fi these days is unacceptable."

"Smorgasbord at top of gondola"

"Increased availability to affordable parking e.g. an underground parking facility"

"Prices for domestic travellers. everything was very expensive, especially for families"

"It would be great if there were jump/lime scooters or similar to get around"

"Cost of local bus service. expensive for a two minute ride. \$4."

"Traffic is very bad in Queenstown. Next time we would prefer to stay at Wanaka or Arrowtown due to a more relaxing location."

"More seating options like tables and couches at airport along with places to charge devices. Most airports even rural have plenty of both so it was disappointing to only have hard uncomfortable seats."



HIGHLIGHTS

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

In Q4 2020, Queenstown's scenery and landscapes, activities and attractions and food and wine offerings were the most common highlights. Several visitors also commented on Queenstown being a great place to relax on holiday.

"Friendly people and able to access everything on foot or public bus"

"Range of activities at reasonable prices"

"Spending time away from normal home life to see family and take part in the marathon with my partner"

"Relaxation in a pretty & clean environment"

"Relaxed vibes and a range of different things to do in the township. I like how Queenstown is very tourist orientated and then there are places like Frankton which are more suited to the locals. So you can enjoy a bit of both, especially for a New Zealander who is living in a different part of the country."

"Love the vibe of Queenstown and the nature and amount of walks/hikes. just needs to remember that at the moment its a nz tourist destination, not foreign."

"Relaxation time with beautiful scenery and amazing restaurants"

"Scenery, service, people and plenty of activities to choose from."

"Off road motorcycling"

Hotel experience was great and reasonably priced. Jet boating was excellent.

"The views were breathtaking"

"The beautiful natural environment and no cars in town"

"Range of different eating options, lots a delicious choices"

"Walking around the lakefront"



SAMPLE PROFILE (NEW ZEALAND RESIDENTS)

| Country of birth | |
|---------------------------------------|-----|
| New Zealand | 69% |
| Other country | 31% |
| Region of residence | |
| Northland | 4% |
| Auckland | 39% |
| Waikato | 7% |
| Bay of Plenty | 8% |
| Gisborne | 0% |
| Hawke's Bay | 3% |
| Taranaki | 2% |
| Manawatu-Whanganui | 4% |
| Wellington (& Wairarapa) | 16% |
| Tasman | 1% |
| Nelson | 1% |
| Marlborough | 0% |
| West Coast | 0% |
| Canterbury | 11% |
| Otago | 4% |
| Southland | 2% |
| Base: Total Sample Sep-Dec 2020 n=323 | |

| Gender | |
|---------------------------------------|-----|
| Male | 45% |
| Female | 54% |
| Gender Diverse | 0% |
| Prefer not to say | 0% |
| Age | |
| 18-19 years | 2% |
| 20-24 years | 8% |
| 25-29 years | 15% |
| 30-34 years | 13% |
| 35-39 years | 11% |
| 40-44 years | 10% |
| 45-49 years | 10% |
| 50-54 years | 12% |
| 55-59 years | 7% |
| 60-64 years | 5% |
| 65-69 years | 5% |
| 70-74 years | 2% |
| 75+ years | 1% |
| Base: Total Sample Sep-Dec 2020 n=323 | |

