



VISITOR INSIGHTS PROGRAMME
VISITOR EXPERIENCE
QUEENSTOWN

Q1 2017 (JANUARY - MARCH)

MOTIVATORS TO VISIT:

While the majority of visitors to Queenstown are in the region for a holiday/vacation or short-break, there was a notable increase in the number of domestic visitors in the region for business reasons or to attend events over the summer (Q1) versus previous quarters.

Australian and other international visitors continue to be attracted to Queenstown for the novelty value (to explore and discover uniquely different places and experiences), prestige/status (to visit a must-see destination that people talk about), and for adventure/excitement (to experience adventure and excitement). Opportunities for relationship enhancement (to spend time with family, friends or a partner) and relaxation (to relax, recharge, and feel refreshed) are the primary motivators for domestic visitors.

As noted in previous quarters, returning visitors have higher expectations of finding good food and wine in Queenstown and of the region being a relaxing place to visit, suggesting an opportunity to further promote Queenstown's culinary and wine offerings or as a destination to relax and unwind.

TRAVEL BEHAVIOUR:

Approximately one in three visitors start booking their trip to Queenstown within a month of arriving in the region. This proportion is fairly similar across markets. Over the summer period (Q1), both the proportion of other international visitors who started booking their trip less than a month out and the proportion who started booking their trip more than six months in advance increased. Not surprisingly, younger backpackers aged 18-24 years are more likely to book their trip to Queenstown at the last minute as they travel around the country, whereas older international visitors aged 50+ years are more likely to plan and book their trip well in advance. These younger international visitors who book their trip to Queenstown within a month of arrival are significantly more likely to stay in non-commercial accommodation (36%) than those who booked six months or more in advance (22%).

SATISFACTION WITH VISITOR EXPERIENCE:

The overall experience in the Queenstown region is either meeting or exceeding expectation for the vast majority of visitors. The quality of activities/attractions and cleanliness/presentation of the town, exceed visitor expectations, along with the quality of accommodation. While visitors are disappointed with the availability of parking and the traffic flow around Queenstown, the taxi, shuttle and transfer services on offer are exceeding expectations. There continue to be opportunities to boost visitor satisfaction with improvements to both traffic and car parking and also local transport options and services.

The majority of visitors are likely to recommend Queenstown to others as a holiday destination, reflecting the overall positive visitor experience in the region.

MAIN REASON FOR VISIT

What is the main reason for your visit to the Queenstown region (on this trip)?

Main Reason for Visit [Single Response]	New Zealand	Australia	Other International
Holiday/vacation or short-break	51%	88%	93%
Family or friends	7%	2%	5%
Event held by friends or family	11%	0%	0%
Business reasons	10%	0%	1%
Event held by someone else	8%	2%	0%
Transport connection/just passing through	4%	0%	0%
Conference or convention	2%	2%	0%
Education/study	0%	2%	0%
Other	5%	2%	1%
<i>Base: Total Sample</i>	<i>(n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>

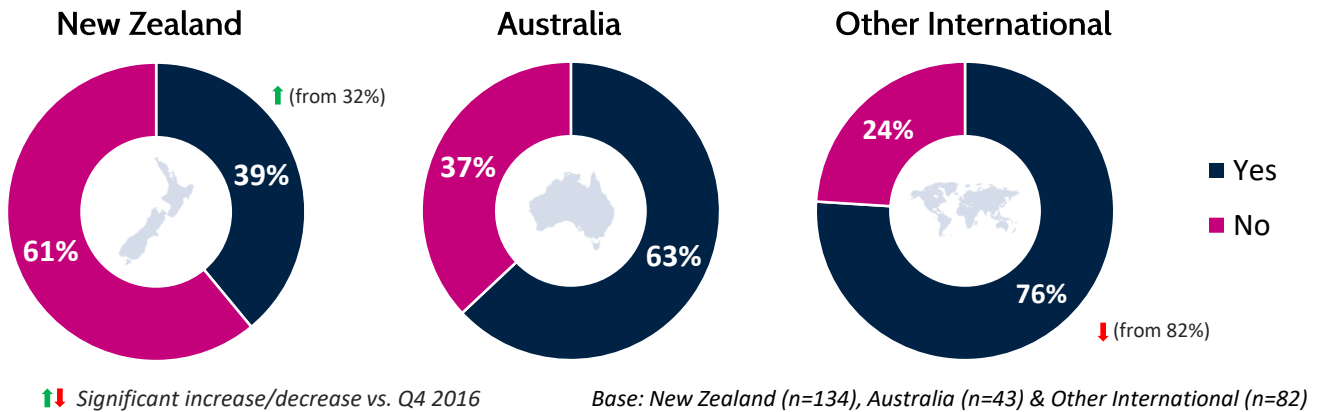
TRAVEL MOTIVATIONS

Which (if any) of the following were reasons for you deciding to visit the Queenstown region for a holiday/vacation or short-break?

Travel Motivations [Multiple Response]	New Zealand	Australia	Other International
Explore and discover uniquely different places and experiences	33%	39%	53%
Visit a must-see destination that people talk about	20%	37%	38%
Experience adventure and excitement	19%	37%	37%
Relax, recharge and feel refreshed	35%	32%	25%
Spend time with my family, friends, or partner	41%	24%	14%
Escape from the routine and pressures of everyday life	26%	18%	17%
Meet new people and share experiences	3%	8%	11%
Indulge in comfort and be pampered	1%	3%	1%
None of the above	0%	0%	4%
<i>Base: Visitors on Holiday/Vacation or Short Break</i>	<i>(n=69)</i>	<i>(n=38)</i>	<i>(n=76)</i>

DRIVERS OF DESTINATION CHOICE

When planning your current trip, did you consider visiting any region in New Zealand instead of Queenstown?



And which of the following were important in your decision to visit the Queenstown region (rather than somewhere else)?

Drivers of Destination Choice [Multiple Response]	New Zealand	Australia	Other International
Queenstown's natural environment/scenery	38%	46%	56%
Activities/experiences available in Queenstown	37%	37%	38%
Recommendations by family or friends	14%	22%	21%
Convenient travel options to get to/from Queenstown	12%	20%	11%
Queenstown's restaurants, cafés, nightlife or shopping	14%	10%	12%
Queenstown's weather, climate or seasons	10%	15%	10%
Family or friends I wanted to visit in Queenstown	15%	10%	6%
Stories or promotions I saw/heard about Queenstown	2%	17%	5%
Queenstown's wine/wineries	6%	10%	7%
Queenstown's reputation as a safe and secure destination	8%	10%	5%
A special deal offered on transport/activities/accommodation	5%	10%	2%
Recommendations by a travel advisor (e.g. a travel agent)	3%	2%	10%
Queenstown's people/culture	5%	2%	7%
Accommodation options available in Queenstown	5%	2%	2%
An event, concert or festival held in Queenstown	1%	0%	0%
Other	7%	5%	6%
None of the above	2%	0%	0%
<i>Base: Visitors on Holiday/Vacation or Short Break or Considered Visiting Alternative Region</i>	<i>(n=86)</i>	<i>(n=41)</i>	<i>(n=82)</i>

EXPECTATIONS OF QUEENSTOWN

Which of the following did you expect to find in the Queenstown region?

Expectations of Queenstown [Multiple Response]	New Zealand	Australia	Other International
Beautiful natural landscapes and scenery	77%	67%	79%
Adventure and excitement	52%	56%	46%
A clean and unpolluted environment	46%	40%	39%
A relaxing place to visit	52%	40%	32%
Good food and wine	49%	42%	30%
Friendly local people	38%	42%	37%
A safe and secure place to visit	42%	44%	28%
An appealing cityscape/townscape	39%	42%	30%
Good weather	42%	16%	32%
A vibrant urban environment	22%	21%	23%
Unique history or heritage sites	28%	19%	6%
Unique wildlife	10%	16%	20%
Unique bush or plants	13%	23%	9%
An authentic culture	9%	9%	6%
None of the above	0%	0%	0%
<i>Base: Total Sample</i>	<i>(n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>



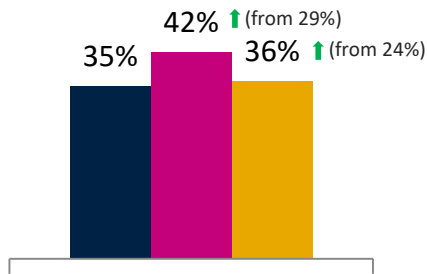
Those who had previously visited Queenstown had significantly higher expectations of: -

- the region being a **relaxing place to visit** (52% vs 34%)
- finding **good food and wine** in the region (50% vs 33%)

TIME BETWEEN BOOKING AND ARRIVAL

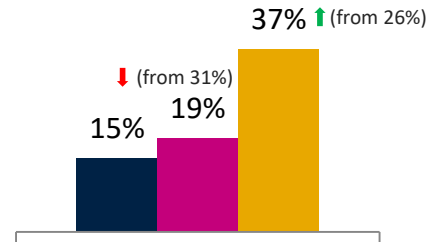
On your current trip, how long was it between when you first booked some or all of your trip to Queenstown (i.e. flights and/or accommodation) and when you actually arrived in the region?

Less than a month



■ New Zealand ■ Australia

6 months +



■ Other International

↑ ↓ Significant increase/decrease vs. Q4 2016

Booking to Arrival Lag [Single Response]	New Zealand	Australia	Other International
I didn't book anything before I arrived	2%	0%	2%
Less than a week	23%	19%	24%
One week to a month	12%	23%	12%
1 month	15%	14%	5%
2 months	9%	2%	6%
3 months	10%	12%	7%
4 months	6%	9%	2%
5 months	7%	0%	2%
6 months	9%	7%	11%
7 months	2%	2%	1%
8 months	1%	0%	5%
9 months	1%	2%	6%
10 months	0%	2%	5%
11 months	0%	2%	2%
12 months	1%	2%	5%
Between one and two years	1%	2%	1%
Between two and five years	0%	0%	1%
More than five years	0%	0%	0%
	<i>Base: Total Sample (n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>

TRAVEL COMPANIONS

Who is travelling with you on this trip to the Queenstown region?



Solo

New Zealand: 19%
Australia: 16%
Other International: 15%



Couple (2 People)

New Zealand: 24%
Australia: 47%
Other International: 50% ↑ (from 42%)



Group (3+ people)

New Zealand: 44% ↑ (from 35%)
Australia: 30%
Other International: 26% ↓ (from 38%)

↑↓ Significant increase/decrease vs. Q4 2016

Travel Companions [Multiple Response]	New Zealand	Australia	Other International
No-one, I am travelling on my own	19%	16%	15%
My partner/spouse	46%	53%	57%
My child or children	25%	21%	7%
Other members of my family	23%	21%	12%
A friend or friends	17%	14%	23%
Work/business colleagues	4%	0%	1%
Other members of a tour group	1%	7%	5%
Other members of an organised group	1%	2%	0%
Other people	0%	0%	0%
<i>Base: Total Sample</i>	<i>(n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>

Average Size of Travel Group

New Zealand

4.5 Adults
0.8 Children

Australia

7.3 Adults
0.3 Children

Other International

5 Adults
0.1 Children

LENGTH OF CURRENT TRIP

How many nights in total do you intend to stay in the Queenstown region (on this trip)?

NZ: Including time spent in Queenstown, how many nights in total do you intend to stay away from home on this trip?

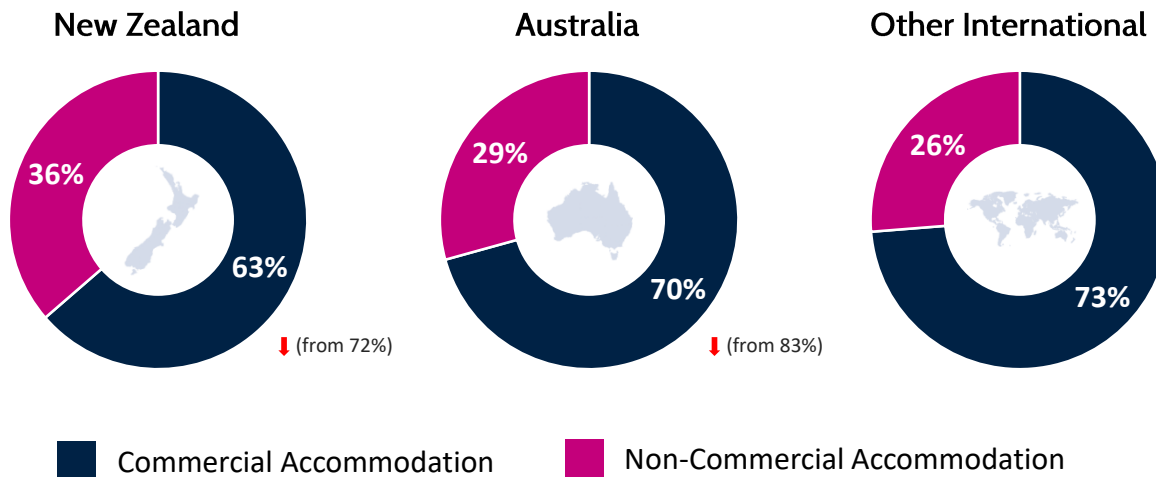
INT: Including time spent in Queenstown, how many nights in total do you intend to stay in New Zealand on this trip?



Base: New Zealand (n=134); Australia (n=43); Other International (n=82)

ACCOMMODATION

What is the main type of accommodation you are using on this visit to the Queenstown region?



↑↓ Significant increase/decrease vs. Q4 2016

Main Accommodation [Single Response]	New Zealand	Australia	Other International
Commercial Accommodation			
Hotel	27%	26%	29%
Motel	9%	12%	10%
Serviced apartment	8%	14%	6%
Backpackers/hostel	5%	14%	12%
Exclusive/luxury lodge	3%	2%	1%
Camping ground/holiday park	11%	2%	15%
Non-Commercial Accommodation			
Private home/holiday home - no payment made	13%	0%	2%
Private home/holiday home - rented	10%	9%	6%
Bed/room in a private home - rented (e.g. Airbnb)	3%	7%	6%
Bed and Breakfast	0%	7%	5%
Homestay or Farmstay	0%	0%	1%
National Park DoC hut or tent site	2%	2%	1%
Freedom camping (tent, campervan etc.)	0%	2%	5%
Other	8%	2%	0%
<i>Base: Total Sample</i>	<i>(n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>

EXPERIENCES IN REGION

During your current stay in the Queenstown region, which of these have you done or do you intend to do?

Experiences in Region [Multiple Response]	New Zealand	Australia	Other International
Restaurants and cafés, bars/nightclubs	49%	53%	50%
Sightseeing (on foot, by road, cable car, or rail – independently or on a tour – including popular attractions)	49%	58%	45%
Skyline Gondola and lookout	49%	49%	41%
Walking, hiking, climbing, trekking, tramping	31%	47%	50%
A visit to Arrowtown	41%	40%	34%
A visit to Fiordland/Milford Sound	19%	42%	48%
Shopping	31%	42%	34%
River and lake adventures (e.g. jetboating, rafting)	16%	42%	21%
Lake cruising or boating (including fishing, water skiing)	17%	23%	23%
Extreme activities (bungy, canyon swings, skydiving)	7%	26%	23%
Wineries or other wine experiences	16%	19%	16%
Art galleries, museums, historic buildings or sites or other cultural or heritage attractions	14%	26%	9%
A visit to Glenorchy	14%	14%	20%
Flying/air activities	6%	14%	18%
Cycling/biking	12%	14%	11%
Viewing, learning about or interacting with birds or animals	7%	9%	17%
Lord of the Rings, Hobbit or other film-related sightseeing tours and activities	4%	7%	20%
Wellness experiences	3%	9%	7%
Other soft adventure or sports activities (such as horse riding)	6%	2%	9%
Golf	4%	7%	1%
Event, concert or festivals	7%	0%	0%
Ski, snow, ice activities	2%	0%	2%
None of the above	9%	0%	0%
<i>Base: Total Sample</i>	<i>(n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>

SATISFACTION

On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied are you with these aspects of your current experience in the Queenstown region?

New Zealand	Q1 2015	Q1 2016	Q1 2017
Accommodation	8.3	8.2	7.9
Transport to Queenstown	8.4	8.4	7.9
Local transport options and services	7.7	7.8	7.4
Traffic and car parking	6.5*	6.1*	5.4
Public facilities (parks, toilets)			7.9
Natural environment	-	-	9.2
Cleanliness/presentation of town/region	8.6	8.6	8.6
Activities and attractions	8.9	8.6	8.7
Restaurants, cafes and bars in Queenstown	8.4	8.7	8.4
Overall experience in the Queenstown region	8.8	8.8	8.7
Australia	Q1 2015	Q1 2016	Q1 2017
Accommodation	8.0	8.1	8.3
Transport to Queenstown	8.4	8.0	8.4
Local transport options and services	7.9	7.0	8.0
Traffic and car parking	6.6*	5.6*	6.3
Public facilities (parks, toilets)			8.5
Natural environment	-	-	9.3
Cleanliness/presentation of town/region	8.9	8.3	9.1
Activities and attractions	9.0	9.0	9.1
Restaurants, cafes and bars in Queenstown	8.4	8.4	8.7
Overall experience in the Queenstown region	8.7	8.7	9.0
Other International	Q1 2015	Q1 2016	Q4 2016
Accommodation	7.5	8.0	8.5
Transport to Queenstown	8.1	8.4	8.4
Local transport options and services	7.6	7.3	8.1
Traffic and car parking	6.8*	6.5*	6.8
Public facilities (parks, toilets)			8.7
Natural environment	-	-	9.5
Cleanliness/presentation of town/region	8.6	8.9	9.3
Activities and attractions	8.6	8.7	9.0
Restaurants, cafes and bars in Queenstown	8.2	8.3	8.6
Overall experience in the Queenstown region	8.5	8.7	9.0

*Previously 'Parking and other public facilities'

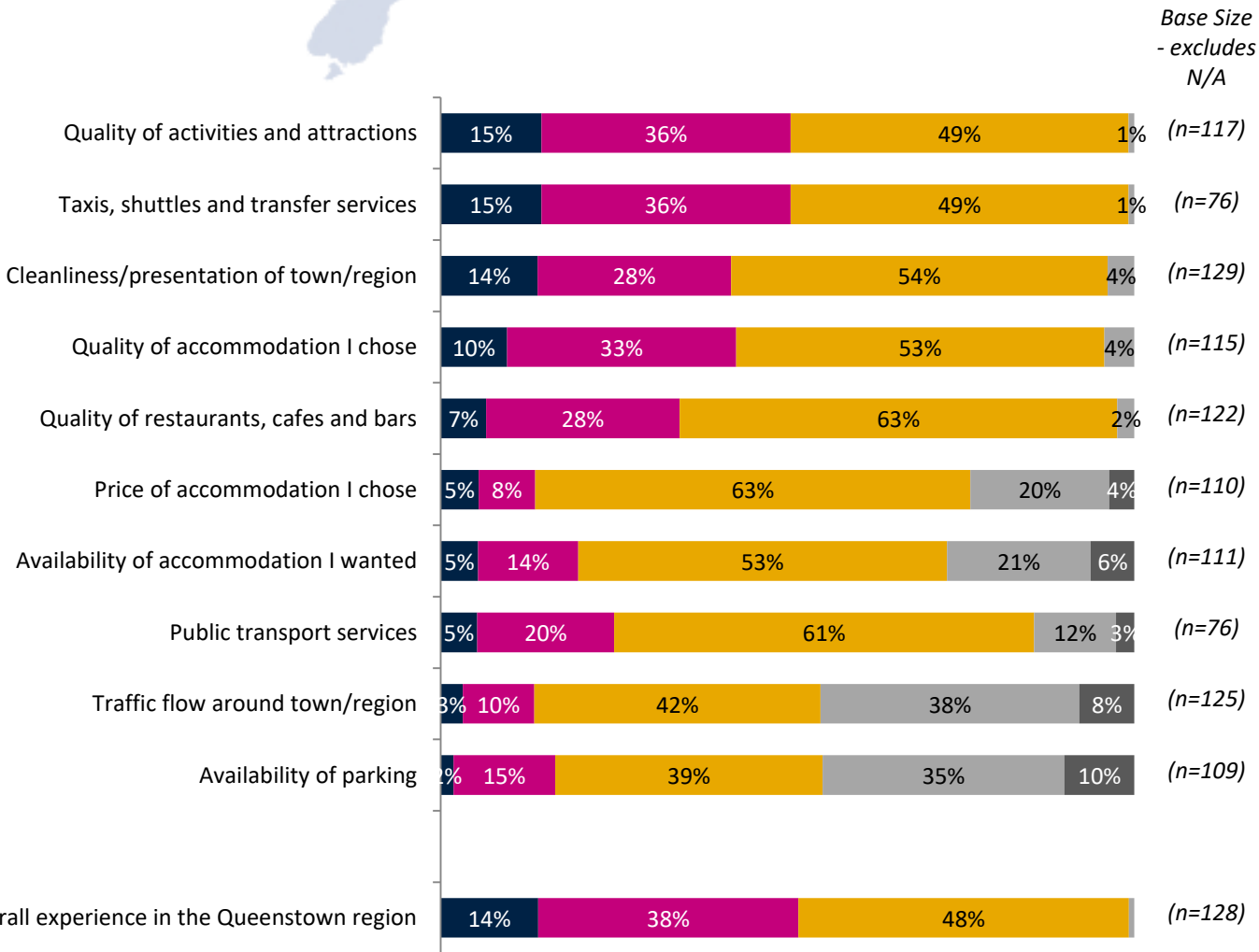


EXPERIENCE VS. EXPECTATIONS

Based on previous visits or on anything you had seen or heard about the Queenstown region before arriving, how has your experience (on this trip) lived up to your expectations for the following aspects?



New Zealand Visitors



Much better than expected
 Better than expected
 Just as expected
 Worse than expected
 Much worse than expected



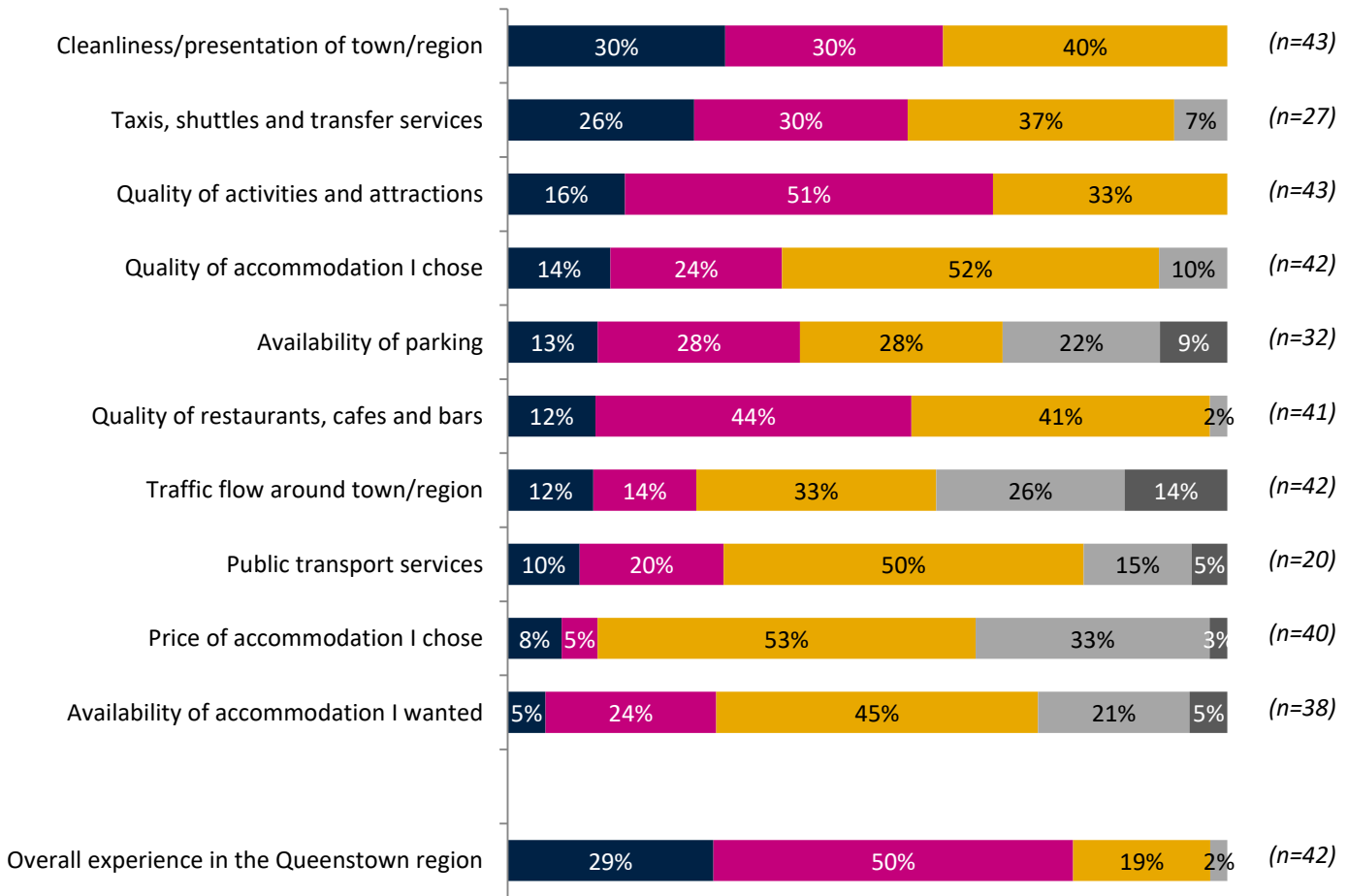
EXPERIENCE VS. EXPECTATIONS

Based on previous visits or on anything you had seen or heard about the Queenstown region before arriving, how has your experience (on this trip) lived up to your expectations for the following aspects?



Australian Visitors

Base Size
- excludes
N/A



Much better than expected
 Better than expected
 Just as expected
 Worse than expected
 Much worse than expected

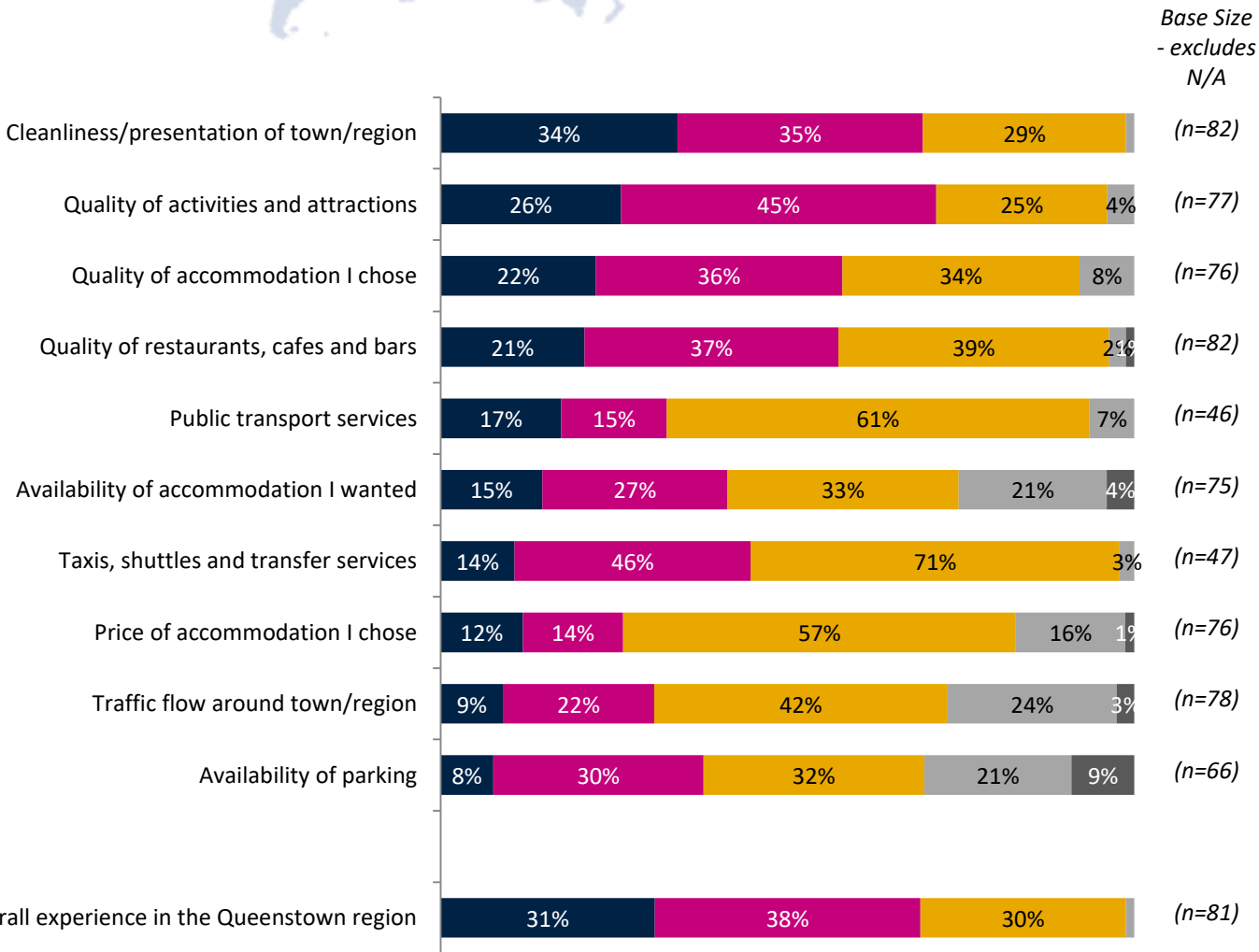


EXPERIENCE VS. EXPECTATIONS

Based on previous visits or on anything you had seen or heard about the Queenstown region before arriving, how has your experience (on this trip) lived up to your expectations for the following aspects?



Other International Visitors

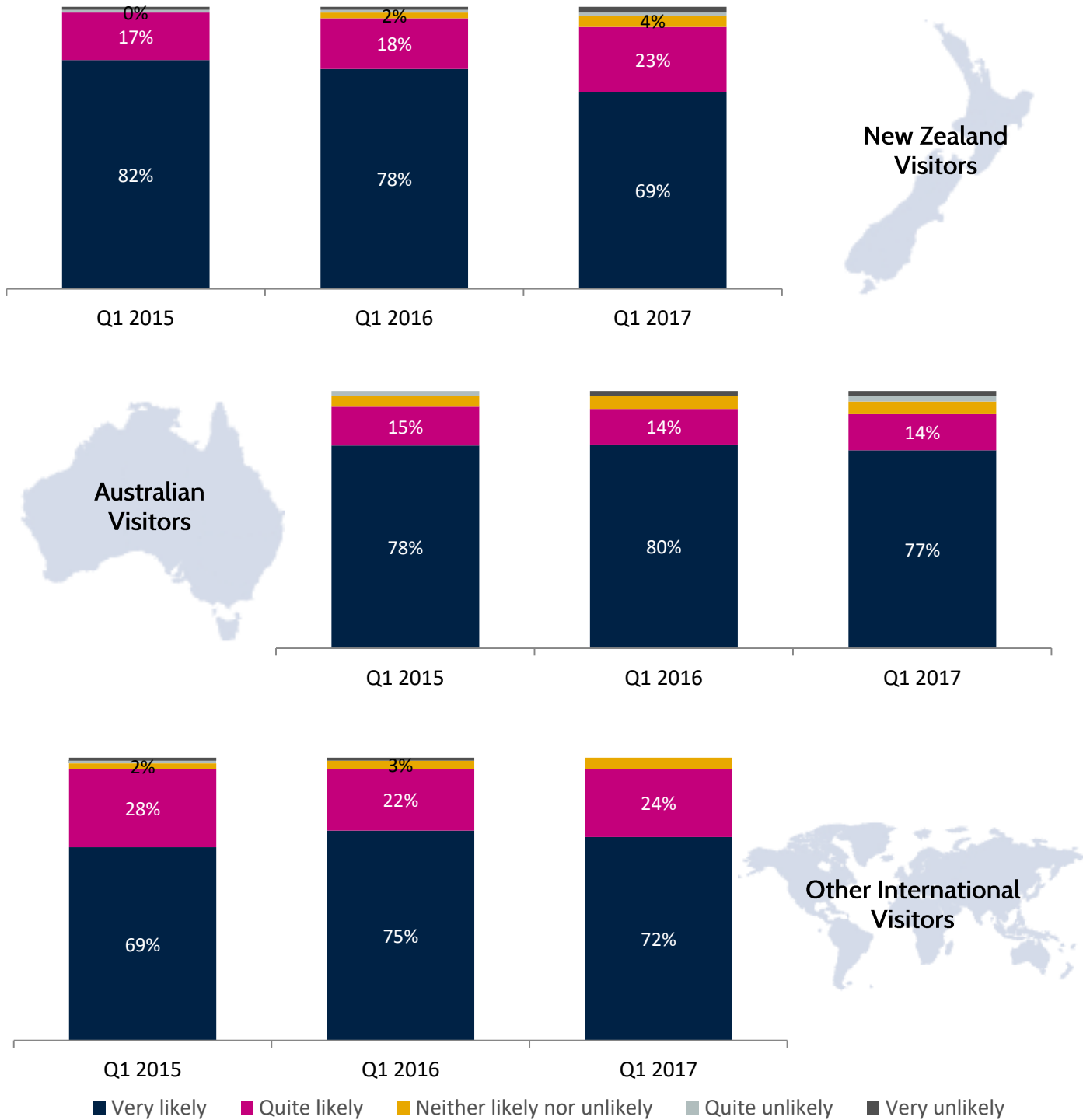


Much better than expected
 Better than expected
 Just as expected
 Worse than expected
 Much worse than expected



PROPENSITY TO RECOMMEND QUEENSTOWN

How likely is it that you will recommend the Queenstown region as a holiday destination to other people?

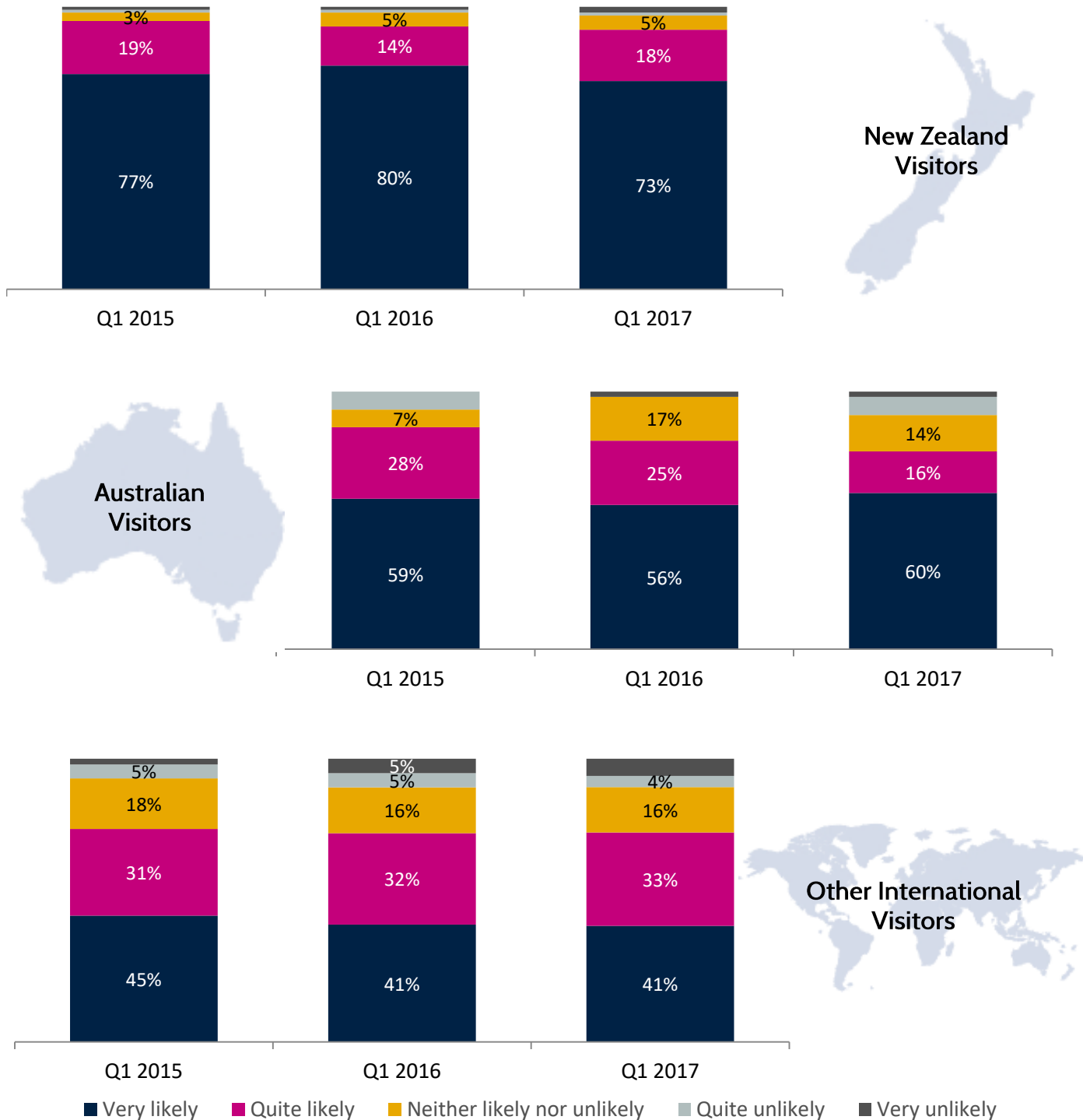


Base: New Zealand (n=127); Australia (n=42); Other International (n=84)



PROPENSITY TO RETURN TO QUEENSTOWN

How likely is it that you will return to the Queenstown region again in the future?



Base: New Zealand (n=127); Australia (n=42); Other International (n=84)



DEMOGRAPHICS

Sample Profile

Gender	New Zealand	Australia	Other International
Male	51%	58%	45%
Female	49%	42%	55%
Gender Diverse	1%	0%	0%

Age	New Zealand	Australia	Other International
15-17 years	0%	2%	0%
18-19 years	3%	0%	1%
20-24 years	10%	12%	12%
25-29 years	7%	16%	20%
30-34 years	17%	7%	13%
35-39 years	10%	7%	12%
40-44 years	10%	14%	2%
45-49 years	10%	14%	2%
50-54 years	6%	5%	6%
55-59 years	10%	14%	7%
60-64 years	5%	0%	11%
65-69 years	4%	5%	5%
70-74 years	3%	2%	7%
75+ years	2%	2%	0%
Would rather not say	1%	0%	0%

Previous Visits to Queenstown	New Zealand	Australia	Other International
None (First Visit to Queenstown)	17%	70%	83%
1-5 Previous Visits	51%	28%	16%
6-10 Previous Visits	12%	0%	1%
11-20 Previous Visits	10%	2%	0%
21+ Previous Visits	10%	0%	0%
<i>Base: Total Sample</i>	<i>(n=134)</i>	<i>(n=43)</i>	<i>(n=82)</i>

Base: New Zealand (n=134); Australia (n=43); Other International (n=82)



DEMOGRAPHICS

Sample Profile

Region of Residence (New Zealand)

Northland	4%
Auckland	36%
Waikato	2%
Bay of Plenty	5%
Gisborne	0%
Hawkes Bay	1%
Taranaki	0%
Manawatu/Whanganui	1%
Wellington (& Wairarapa)	13%
Marlborough	0%
Nelson	0%
Tasman	1%
West Coast	1%
Canterbury	21%
Otago	5%
Southland	8%
<i>Base: New Zealand (n=134)</i>	

Region of Residence (Australia)

Australian Capital Territory	5%
New South Wales	51%
Northern Territory	0%
Queensland	21%
South Australia	5%
Tasmania	0%
Victoria	12%
Western Australia	7%
<i>Base: Australia (n=43)</i>	

Country of Origin (Other International)

Argentina	4%
Canada	2%
China	6%
Czech Republic	1%
Denmark	1%
France	2%
Germany	6%
India	6%
Indonesia	1%
Ireland	1%
Japan	4%
Korea	2%
Malaysia	1%
Netherlands	5%
Norway	1%
Russia	1%
Singapore	1%
Slovakia	1%
Sweden	2%
Switzerland	2%
United Kingdom	26%
United States	20%
Venezuela	1%
<i>Base: Other International (n=82)</i>	

Base: New Zealand (n=134); Australia (n=43); Other International (n=82)



Background

The Visitor Insights Programme (VIP) is an ongoing programme revealing how New Zealand's visitors think, feel and act.

The Visitor Experience programme (the in-region component of the VIP) is designed to help Destination Queenstown to better understand the visitor experience in Queenstown (e.g. travel motivations, expectations, booking behaviour, travel behaviour, activities/experiences, satisfaction with the experience, and advocacy) and to investigate any other specific issues relevant to the region.

Research Method

The Visitor Experience programme is designed to provide quarterly or seasonal 'snapshots', with fieldwork ongoing throughout the year. A target of 250 interviews is completed in Queenstown in each quarter of the year, aggregating to a total of 1,000 interviews per year.

Respondents for the Visitor Experience programme are recruited at designated field sites around Queenstown, on between 9 and 13 randomly selected days each quarter. Survey sites are selected in consultation with Destination Queenstown and generally a combination of sites is used to ensure a good cross-section of visitors is involved. At each site and on each field day, standard random sampling procedures are used to select respondents to maximise the representativeness of the Visitor Experience programme sample (for example, selecting every nth person who passes a given point, selecting a person in a group who last had a birthday). However, to qualify to take part in the survey, respondents must be at least 15 years of age, live outside of Queenstown, and have stayed in Queenstown for at least one night at the time of participating in the survey. Quotas are set to ensure the sample includes an equal number of males and females, and an equal number of domestic and international visitors.

Respondents participate in the Visitor Experience programme via a questionnaire loaded on iPads. At the end of each survey day, data is transmitted electronically to a central server where it is held securely for aggregation and analysis at the end of the quarter.

Contact Details

For more information about the Visitor Experience programme please contact:-

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Survey Error and Known Sample Bias:

All surveys are prone to some degree of error. Sampling error arises from the fact that data is collected from a subset of the population concerned (i.e. a sample of visitors, rather than a census of visitors). Where surveys use straight probability (or random) sampling, the degree of sampling error can usually be measured from the sample data.

However, the Visitor Experience programme uses a combination of non-random and random sampling: non-random sampling in the selection of survey sites employed, and random sampling in the selection of respondents at those survey sites. The use of non-random sampling means that not every member of the population – in this instance, visitors – has an equal chance of being selected: for example, visitors who do not visit the specific survey sites have no chance of being selected for an interview. As a result, it is not possible to accurately calculate sampling error in relation to the Visitor Experience programme data. It is possible only to say that the margin of error associated with the Visitor Experience programme data is likely to be at least as high as that of a survey of similar scale in which respondents are randomly selected.

With this in mind, the Visitor Experience programme is based on a sample of around $n=1,000$ respondents interviewed in Queenstown per year. A randomly selected sample of $n=1,000$ attracts a maximum margin of error of $\pm 3\%$ (when expressed at the 95% confidence level). This means that had the survey been repeated 100 times, we would expect any result to be within 3% of the result reported on 95 out of the 100 occasions. Note that this report is based on one quarter of data ($n=250$) attracting a maximum margin or error of $\pm 6\%$ (when expressed at the 95% confidence level).

For example, if we found that 25% of visitors stayed in hotel accommodation for the year, we would expect this result to be within 22% and 28% on 95 occasions if the survey were repeated 100 times in the same period. As a consequence, this result would need to move below 22% or above 28% from one year to the next for the change to be regarded as statistically significant.

Calculating statistical significance on averages or means (e.g. 8.3 out of 10 vs. 8.7 out of 10) is somewhat more complex, taking into account as it does the question of standard deviation (the extent to which results in each instance vary from the average). For those with access to the Visitor Experience programme data, there are many online resources available to assist with analysis of statistical significance.

Non-sampling error: survey error can also be caused by factors unrelated to sampling procedures (for example, mistakes made by interviewers or respondents, by faulty questionnaires, inaccurate data entry or processing errors). The Visitor Experience programme has been designed to minimise such opportunities for error, with careful questionnaire design and single step data capture (respondent to database with no intermediary steps).

The Visitor Experience programme is an intercept survey in which interviews are undertaken with visitors recruited at a range of locations around Queenstown. While (multiple) survey sites are selected to provide the widest possible cross-section of visitors to Queenstown, the sample that results may not be representative of all visitors to Queenstown – for example it is likely that short stay and non-leisure visitors are under-represented, as they are less likely to be recruited. This in turn means that measures such as number of nights spent in Queenstown are likely to be biased towards longer stay, leisure visitors. Such measures are best used as a basis for comparison (e.g. what are the differences between short and long stay visitors), rather than as a measure of actual activity.