VISITOR INSIGHTS PROGRAMME
VISITOR EXPERIENCE
QUEENSTOWN

Q1 2018 (JANUARY - MARCH)

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Satisfaction with the Visitor Experience in Queenstown:

Overall visitor satisfaction and propensity to recommend Queenstown remains extremely high, driven primarily by the appealing natural environment, the quality of activities and attractions in the region and the cleanliness/presentation of the town. For more than half of all visitors to Queenstown, their experience in the region exceeds their expectations. There does, however, appear to be some seasonal fluctuation in visitor experience ratings. Overall satisfaction and satisfaction with accommodation in particular appear to be softer in the Summer months (Q1) than in other quarters. This softening in satisfaction is having an impact on advocacy for the region, with fewer Q1 visitors 'very likely' to recommend Queenstown as a holiday destination compared to other times of the year.

Motivators for Visiting Queenstown:

Queenstown visitors continue to visit the region for its novelty value (to explore and discover uniquely different places and experiences), its prestige/status value (to experience a must-see destination that people talk about), and to experience adventure & excitement. For domestic visitors, relaxation is also one of the primary motivators to visiting. Queenstown's activities/attractions and natural environment/scenery continue to be the two key drivers of destination choice over other regions.

Domestic Market (Q1 2018):

Several year-on-year changes were noted for the domestic market this quarter, including:

- An increase in the proportion of solo visitors (rather than travelling with partner, children, or family)
- A decrease in the proportion of visitors looking to enhance existing relationships (spending time with family/friends/partner) and increase in those looking for social interaction (meeting new people)
- An increase in visitors staying in backpackers/hostels and in rented private beds/rooms (e.g. Air BnB)
- Queenstown's weather/climate and people/culture have strengthened as destination choice drivers
- Domestic visitors had lower expectations of finding beautiful scenery and landscapes, good weather, and unique history or heritage sites before arriving in Queenstown
- Increase in Glenorchy visits, extreme activities, wellness experiences and film-related experiences
- Increase in experiences exceeding expectations with regards to activities/attractions, cleanliness/presentation of the town, restaurants/cafes/bars, and public transport

It should be noted that there ended up being a greater proportion of younger visitors (<30 years) in the domestic sample in Q1 2018 compared to Q1 2017 and a greater proportion of New Zealanders who were visiting Queenstown for the first time. Either or both of variations in sample composition may have contributed to these changes. We'll continue to monitor these metrics to confirm if these are genuine trends or simply fluctuations relating to the sample this quarter.

> Throughout report, arrows (⬆/⬇) indicate statistically significant increases/decreases vs. Q1 2017 at 95% confidence

MAIN REASON FOR VISIT

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

New Zealand	Australia	Other International
50% for a holiday/vacation or short-break	**85%** for a holiday/vacation or short-break	**88%** for a holiday/vacation or short-break
14% to visit family or friends	**8%** to attend an event held by friends or family	**3%** to visit family or friends
6% for a conference or convention	**4%** to visit family or friends	**3%** to make a transport connection/just passing through
6% to attend an event held by someone else	**4%** for education/study	

Main Reason for Visit [Single Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
Holiday/vacation or short-break	**50%**	51%	**85%**	88%	**88%**	93%
Family or friends	**14%**	7%	**4%**	2%	**3%**	5%
Business reasons	**5%**	2%	**0%**	2%	**0%**	0%
Conference or convention	**6%**	10%	**0%**	0%	**2%**	1%
Transport connection/just passing through	**4%**	0%	**0%**	2%	**3%**	0%
Event held by friends or family	**5%**	11%	**8%**	0%	**0%**	0%
Education/study	**2%**	8%	**4%**	2%	**0%**	0%
Event held by someone else	**6%**	4%	**0%**	0%	**1%**	0%
Other	**8%**	5%	**0%**	2%	**3%**	1%
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

Small sample size (n=>30)

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TRAVEL MOTIVATIONS

New Zealand	Australia	Other International
34% to relax, recharge and feel refreshed	**32%** to explore and discover uniquely different places and experiences	**51%** to explore and discover uniquely different places and experiences
33% to experience adventure and excitement	**32%** to experience adventure and excitement	**41%** to visit a must-see destination that people talk about
33% to explore and discover uniquely different places and experiences	**27%** to visit a must-see destination that people talk about	**38%** to experience adventure and excitement
31% to visit a must-see destination that people talk about		

Travel Motivations [Multiple Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
Spend time with my family, friends, or partner	**22%** ↓	41%	**18%**	24%	**10%**	14%
Experience adventure and excitement	**33%**	19%	**32%**	37%	**38%**	37%
Relax, recharge and feel refreshed	**34%**	35%	**23%**	32%	**20%**	25%
Escape from the routine and pressures of everyday life	**20%**	26%	**18%**	18%	**15%**	17%
Explore/discover uniquely different places and experiences	**33%**	33%	**32%**	39%	**51%**	53%
Visit a must-see destination that people talk about	**31%**	20%	**27%**	37%	**41%**	38%
Meet new people and share experiences	**20%** ↑	3%	**9%**	8%	**16%**	11%
Indulge in comfort and be pampered	**6%**	1%	**9%**	3%	**2%**	1%
None of the above	**2%**	0%	**0%**	0%	**6%**	4%
Base: Visitors on Holiday/Vacation or Short Break	(64)	(69)	(22)*	(38)	(88)	(76)

Small sample size (n=>30)

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DRIVERS OF DESTINATION CHOICE

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

New Zealand
56% No, 44% Yes

Australia
27% No, 73% Yes

Other International
15% No, 85% Yes

- **Yes**
- **No**
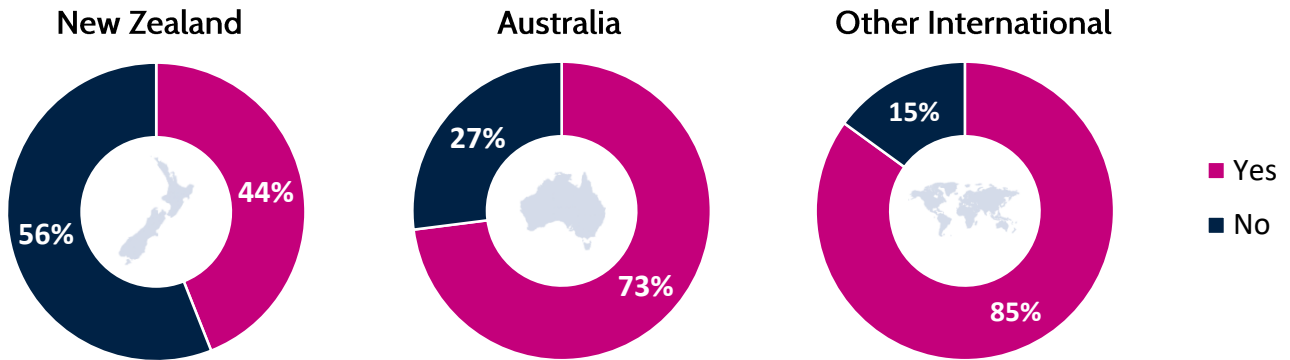
Base: New Zealand (n=127), Australia (n=26) & Other International (n=100)

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	
	Q1 2018	Q1 2017	Q1 2018	Q1 2017	Q1 2018	Q1 2017
Activities/experiences available in Queenstown	45%	37%	54%	37%	43%	38%
Queenstown's natural environment/scenery	45%	38%	38%	46%	44%	56%
Recommendations by family or friends	23%	14%	25%	22%	22%	21%
Queenstown's weather, climate, or seasons	22%	10%	17%	15%	11%	10%
Queenstown's people/culture	19% ⬆	5%	13%	2%	12%	7%
Convenient travel options to get to/from Queenstown	13% ⬆	12%	17%	20%	13%	11%
Restaurants, cafes, nightlife or shopping	20%	14%	8%	10%	14%	12%
Reputation as a safe and secure destination	18%	8%	8%	10%	10%	5%
Stories or promotions I saw/heard about Queenstown	8%	2%	17%	17%	10%	5%
Wine/wineries	10%	6%	13%	10%	7%	7%
Family or friends I wanted to visit in Queenstown	12%	15%	8%	10%	6%	6%
Recommendations by a travel advisor (e.g. travel agent)	5%	3%	8%	2%	13%	10%
Accommodation options available in Queenstown	7%	5%	8%	2%	4%	2%
An event, concert or festival held in Queenstown	4%	1%	4%	0%	2%	0%
Special deal offered on transport/activities/accommodation	2%	5%	0%	10%	5%	2%
Other	0%	7%	0%	0%	2%	0%
Base: Visitors on Holiday/Vacation or Short Break or Considered Visiting Alternative Region	(83)	(86)	(24)*	(41)	(99)	(82)

*Small sample size (n=>30)

EXPECTATIONS OF QUEENSTOWN

New Zealand	Australia	Other International
66% beautiful natural landscapes and scenery	**77%** beautiful natural landscapes and scenery	**69%** beautiful natural landscapes and scenery
58% adventure and excitement	**42%** a clean and unpolluted environment	**65%** adventure and excitement
44% good food and wine	**42%** an appealing cityscape/landscape	**38%** friendly local people

Expectations of Queenstown [Multiple Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
Beautiful natural landscapes and scenery	**66%**	77%	**77%**	67%	**69%**	79%
Adventure and excitement	**58%** ⬇	52%	**31%**	56%	**65%**	46%
A clean and unpolluted environment	**43%**	46%	**42%** ⬇	40%	**35%** ⬆	39%
Friendly local people	**43%**	38%	**35%**	42%	**38%**	37%
An appealing cityscape/townscape	**35%**	39%	**42%**	42%	**32%**	30%
A relaxing place to visit	**43%**	52%	**27%**	40%	**36%**	32%
Good food and wine	**44%**	49%	**35%**	42%	**26%**	30%
A safe and secure place to visit	**42%**	42%	**23%**	44%	**32%**	28%
Good weather	**29%**	42%	**27%**	16%	**34%**	32%
A vibrant urban environment	**23%** ⬇	22%	**12%**	21%	**18%**	23%
Unique bush or plants	**12%**	13%	**12%**	23%	**9%**	9%
Unique history or heritage sites	**17%**	28%	**4%**	19%	**11%**	6%
An authentic culture	**14%** ⬇	9%	**8%** ⬇	9%	**7%**	6%
Unique wildlife	**9%**	10%	**0%**	16%	**19%**	20%
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

Small sample size (n=>30)

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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

39% (New Zealand)
27% (Australia)
29% (Other International)

6 months +

16% (New Zealand)
23% (Australia)
24% (Other International)

■ New Zealand   ■ Australia   ■ Other International
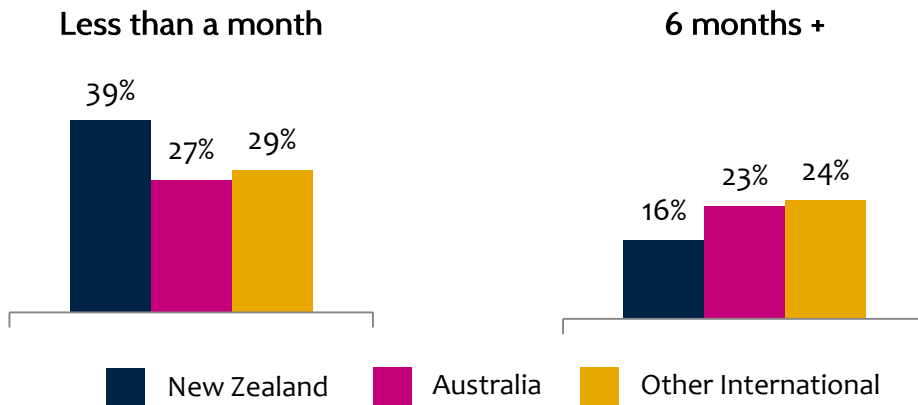
No significant changes for any market versus Q1 2017

Booking to Arrival Lag [Single Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
I didn't book anything before I arrived	**1%**	2%	**0%**	0%	**3%**	2%
Less than a week	**19%**	23%	**4%**	19%	**18%**	24%
One week to a month	**20%**	12%	**23%** ↓	23%	**11%**	12%
1 month	**19%**	15%	**15%**	14%	**5%**	5%
2 months	**7%**	9%	**15%**	2%	**12%**	6%
3 months	**8%**	10%	**4%**	12%	**13%**	7%
4 months	**6%**	6%	**4%**	9%	**10%**	2%
5 months	**5%**	7%	**12%**	0%	**4%** ↑	2%
6 months	**4%**	9%	**15%**	7%	**6%**	11%
7 months	**2%**	2%	**0%**	2%	**3%**	1%
8 months	**1%**	1%	**0%**	0%	**2%**	5%
9 months	**1%**	1%	**0%**	2%	**3%**	6%
10 months	**1%**	0%	**4%**	2%	**0%**	5%
11 months	**2%**	0%	**0%**	2%	**2%** ↓	2%
12 months	**4%**	1%	**4%**	2%	**7%**	5%
Between one and two years	**0%**	1%	**0%**	2%	**0%**	1%
Between two and five years	**0%**	0%	**0%**	0%	**1%**	1%
More than five years	**1%**	0%	**0%**	0%	**0%**	0%
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

Small sample size (n=>30)

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TRAVEL COMPANIONS

Solo
New Zealand: 34%
Australia: 4%
Other International: 20%

2 People
New Zealand: 5%
Australia: 4%
Other International: 4%

Group (3+ people)
New Zealand: 61%
Australia: 92%
Other International: 76%

Travel Companions [Multiple Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	Q1 2018	Q1 2017	Q1 2018	Q1 2017
No-one, I am travelling on my own	34% ⬆	19%	4%	16%	20%	15%
My partner/spouse	28% ⬇	46%	50%	53%	45%	57%
My child or children	7% ⬇	25%	19%	21%	4%	7%
Other members of my family	9% ⬇	23%	23%	21%	13%	12%
A friend or friends	25%	17%	27%	14%	22%	23%
Work/business colleagues	3%	4%	0%	0%	1%	1%
Other members of a tour group	0%	1%	0%	7%	3%	5%
Other members of an organised group	2%	1%	0%	2%	1%	0%
Other people	0%	0%	0%	0%	0%	0%
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

Small sample size (n=>30)

Average Size of Travel Group

New Zealand
3.2 Adults
0.6 Children

Australia
3.2 Adults
0.4 Children

Other International
4.4 Adults
0.1 Children

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?

36%

64%
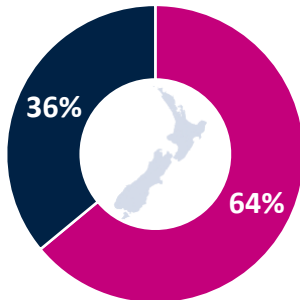
New Zealand Visitors:
Spent **64%** of their trip in Queenstown,
staying an average of **4.0 nights**

Q1 2017: 3.3 Nights

Australian Visitors:
Spent **59%** of their trip in Queenstown,
staying an average of **5.6 nights**

Q1 2017: 3.8 Nights

41%

59%

25%

75%
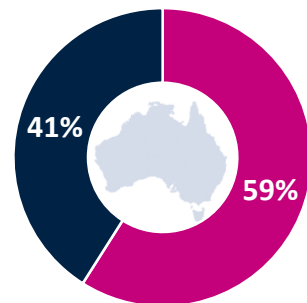
Other International Visitors:
Spent **25%** of their trip in Queenstown,
staying an average of **3.6 nights**

Q1 2017: 3.5 Nights

Base - excludes outliers - staying in Queenstown for longer than a month:
New Zealand (n=127); Australia (n=26); Other International (n=94)*
**Small sample size (n=>30)*

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ACCOMMODATION

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

New Zealand

43% 57%

Australia

31% 70%

Other International

28% 72%

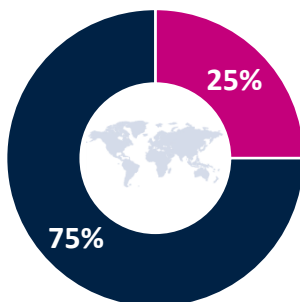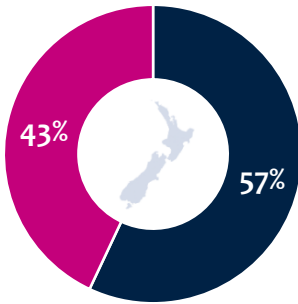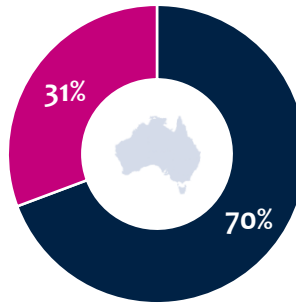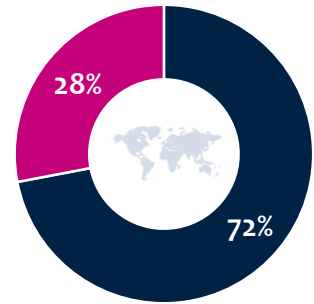■ Commercial Accommodation   ■ Non-Commercial Accommodation

No significant changes for any market versus Q1 2017

Main Accommodation [Single Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	Q1 2018	Q1 2017	Q1 2018	Q1 2017
Commercial Accommodation	57%	63%	70%	70%	72%	73%
Hotel	24%	27%	23%	26%	15%	29%
Motel	9%	9%	8%	12%	4% ↓	10%
Serviced apartment	2%	8%	23%	14%	6%	6%
Backpackers/hostel	16%	5%	8%	14%	26%	12%
Exclusive/luxury lodge	0% ↑	3%	0%	2%	2% ↑	1%
Camping ground/holiday park	6%	11%	8%	2%	19%	15%
Non-Commercial Accommodation	43%	36%	31%	29%	28%	26%
Private home/holiday home - no payment made	16%	13%	0%	0%	4%	2%
Private home/holiday home - rented	8%	10%	12%	9%	6%	6%
Bed/room in a private home - rented (e.g. Airbnb)	9%	3%	15%	7%	8%	6%
Bed and Breakfast	2% ↑	0%	0%	7%	3%	5%
Homestay or Farmstay	0%	0%	0%	0%	1%	1%
National Park DoC hut or tent site	2%	2%	0%	2%	2%	1%
Freedom camping (tent, campervan etc.)	3%	0%	4%	2%	4%	5%
Other	3%	8%	0%	2%	0%	0%
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

*Small sample size (n=>30)

EXPERIENCES IN REGION

Experiences in Region [Multiple Response]	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	Q1 2018	Q1 2017	Q1 2018	Q1 2017
Restaurants and cafes, bars/nightclubs	47%	49%	73%	53%	44%	50%
Skyline Gondola and lookout	35% ↓	49%	58%	49%	50%	41%
Sightseeing	28% ↓	49%	58%	58%	47%	45%
Walking, hiking, climbing, trekking, tramping	34%	31%	54%	47%	42%	50%
A visit to Arrowtown	39%	41%	54%	40%	32%	34%
A visit to Fiordland/Milford Sound	29%	19%	38%	42%	52%	48%
Shopping	34%	31%	38%	42%	32%	34%
River and lake adventures	22%	16%	38%	42%	26%	21%
Lake cruising or boating	17%	17%	42%	23%	20%	23%
Extreme activities	21% ↑	7%	35%	26%	23%	23%
A visit to Glenorchy	32% ↑	14%	23%	14%	18%	20%
Wineries or other wine experiences	15%	16%	35%	19%	13%	16%
Art galleries, museums, historic buildings or sites or other cultural or heritage attractions	15%	14%	19%	26%	11%	9%
Cycling/biking	14%	12%	15%	14%	9%	11%
Viewing, learning about or interacting with birds or animals	6%	7%	19%	9%	13%	17%
Other soft adventure and sports activities (such as horse riding)	12%	6%	19%	2%	4%	9%
Wellness experiences	13% ↑	3%	15%	9%	5%	7%
Lord of the Rings, Hobbit or other film-related sightseeing tours and activities	15% ↑	4%	0%	7%	17%	20%
Flying/air activities	8%	6%	8%	14%	11%	18%
Event, concert or festivals	12%	7%	4%	0%	3%	0%
Ski, snow, ice activities	9%	2%	0%	0%	4%	2%
Golf	5%	4%	4%	7%	4%	1%
None of the above	2%	9%	0%	0%	0%	0%
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

Small sample size (n=>30)

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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?

Overall Experience in the Queenstown Region

New Zealand	1% 6% 37% 53%	8.6
Australian	23% 77%	9.2
Other International	6% 31% 61%	8.8

Legend: ■ 1-2 ■ 3-4 ■ 5-6 ■ 7-8 ■ 9-10
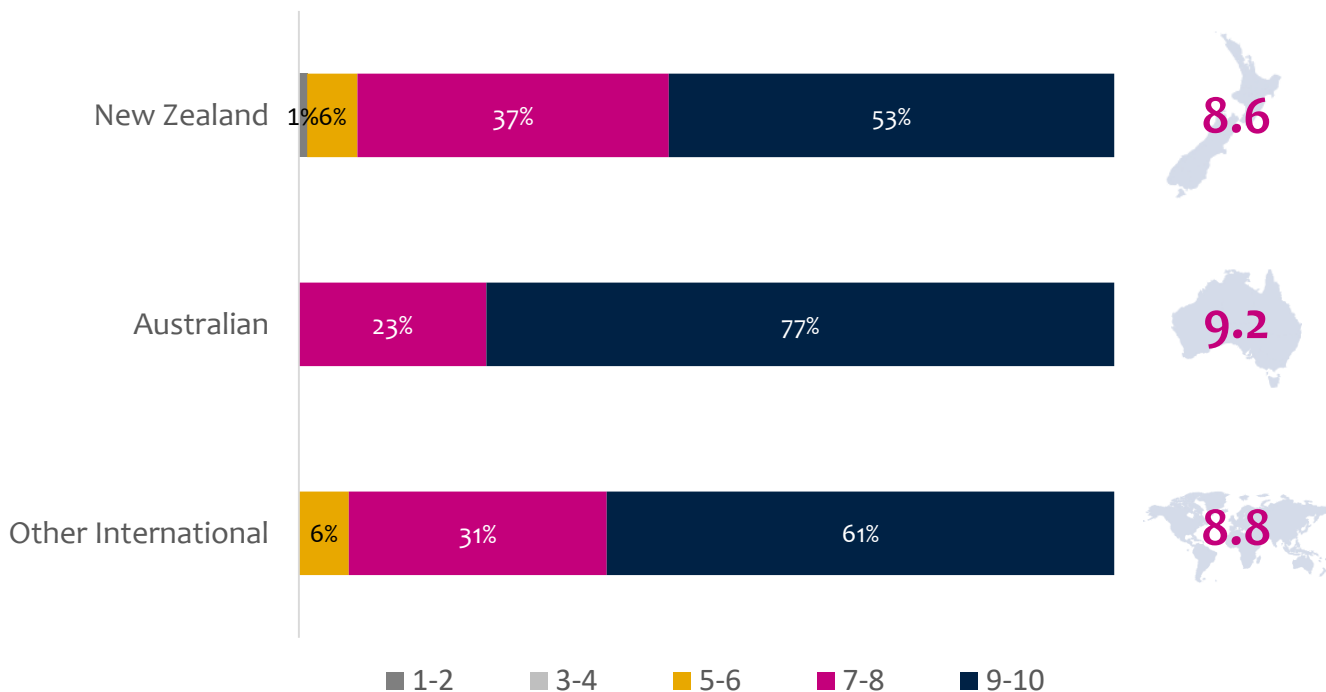
	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	Q1 2018	Q1 2017	Q1 2018	Q1 2017
Accommodation	7.7	7.9	8.3	8.3	8.1	8.5
Transport to Queenstown	8.0	7.9	8.6	8.4	8.2	8.4
Local transport options and services	7.6	7.4	8.2	8.0	8.1	8.1
Traffic and car parking	5.6	5.4	5.9	6.3	6.1	6.8
Public facilities (parks, toilets)	8.0	7.9	8.5	8.5	8.8	8.7
Natural environment	9.1	9.2	9.8	9.3	9.3	9.5
Cleanliness/presentation of town/region	8.5	8.6	9.2	9.1	9.1	9.2
Activities and attractions	8.7	8.7	9.4	9.1	9.0	9.0
Restaurants, cafes and bars in Queenstown	8.4	8.4	8.7	8.7	8.6	8.6
Overall experience in the Queenstown region	8.6	8.7	9.2	9.0	8.8	9.0
Base: Total Sample	(127)	(134)	(26)*	(43)	(100)	(82)

*Small sample size (n=>30)

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

Better than expected (Top 2 Box)

	Q1 2018	Q1 2017
Quality of activities and attractions	66% ⬆	51%
Cleanliness/presentation of town/region	59% ⬆	42%
Quality of restaurants, cafes and bars	68% ⬆	35%
Quality of accommodation I chose	41%	43%
Taxis, shuttles and transfer services	57%	51%
Public transport services	46% ⬆	25%
Availability of accommodation I wanted	28%	19%
Traffic flow around town/region	18%	13%
Availability of parking	16%	17%
Price of accommodation I chose	17%	13%
Overall experience in the Queenstown region	63%	52%

Bar chart data:

- Quality of activities and attractions: 19% | 47% | 32% | 2%
- Cleanliness/presentation of town/region: 15% | 44% | 36% | 3%
- Quality of restaurants, cafes and bars: 14% | 54% | 29% | 2%
- Quality of accommodation I chose: 13% | 28% | 47% | 10% | 2%
- Taxis, shuttles and transfer services: 7% | 50% | 35% | 4% | 3%
- Public transport services: 7% | 39% | 45% | 7% | 3%
- Availability of accommodation I wanted: 6% | 22% | 52% | 15% | 5%
- Traffic flow around town/region: 6% | 12% | 39% | 30% | 13%
- Availability of parking: 5% | 11% | 31% | 40% | 13%
- Price of accommodation I chose: 5% | 12% | 61% | 18% | 5%
- Overall experience in the Queenstown region: 18% | 45% | 35% | 2%

Legend:
- Much better than expected
- Better than expected
- Just as expected
- Worse than expected
- Much worse than expected

NB: Please note that respondents answering "N/A" have been excluded from the above chart

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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

Better than expected (Top 2 Box)

	Much better than expected	Better than expected	Just as expected	Worse than expected	Much worse than expected	Q1 2018*	Q1 2017
Cleanliness/presentation of town/region	42%	23%	35%			**65%**	60%
Quality of activities and attractions	38%	35%	23%	4%		**73%**	66%
Traffic flow around town/region	21%	13%	29%	25%	13%	**34%**	26%
Quality of accommodation I chose	20%	40%	28%	12%		**60%**	38%
Quality of restaurants, cafes and bars	20%	48%	28%	4%		**68%**	56%
Availability of accommodation I wanted	16%	20%	40%	16%	8%	**36%**	29%
Price of accommodation I chose	16%	12%	56%	16%		**28%**	13%
Availability of parking	13%	4%	39%	26%	17%	**17%** ↓	41%
Taxis, shuttles and transfer services	13%	25%	56%	6%		**38%**	56%
Public transport services	12%	24%	53%	12%		**36%**	30%
Overall experience in the Queenstown region	38%	46%	15%			**84%**	79%

Legend:
- Much better than expected
- Better than expected
- Just as expected
- Worse than expected
- Much worse than expected

NB: Please note that respondents answering "N/A" have been excluded from the above chart
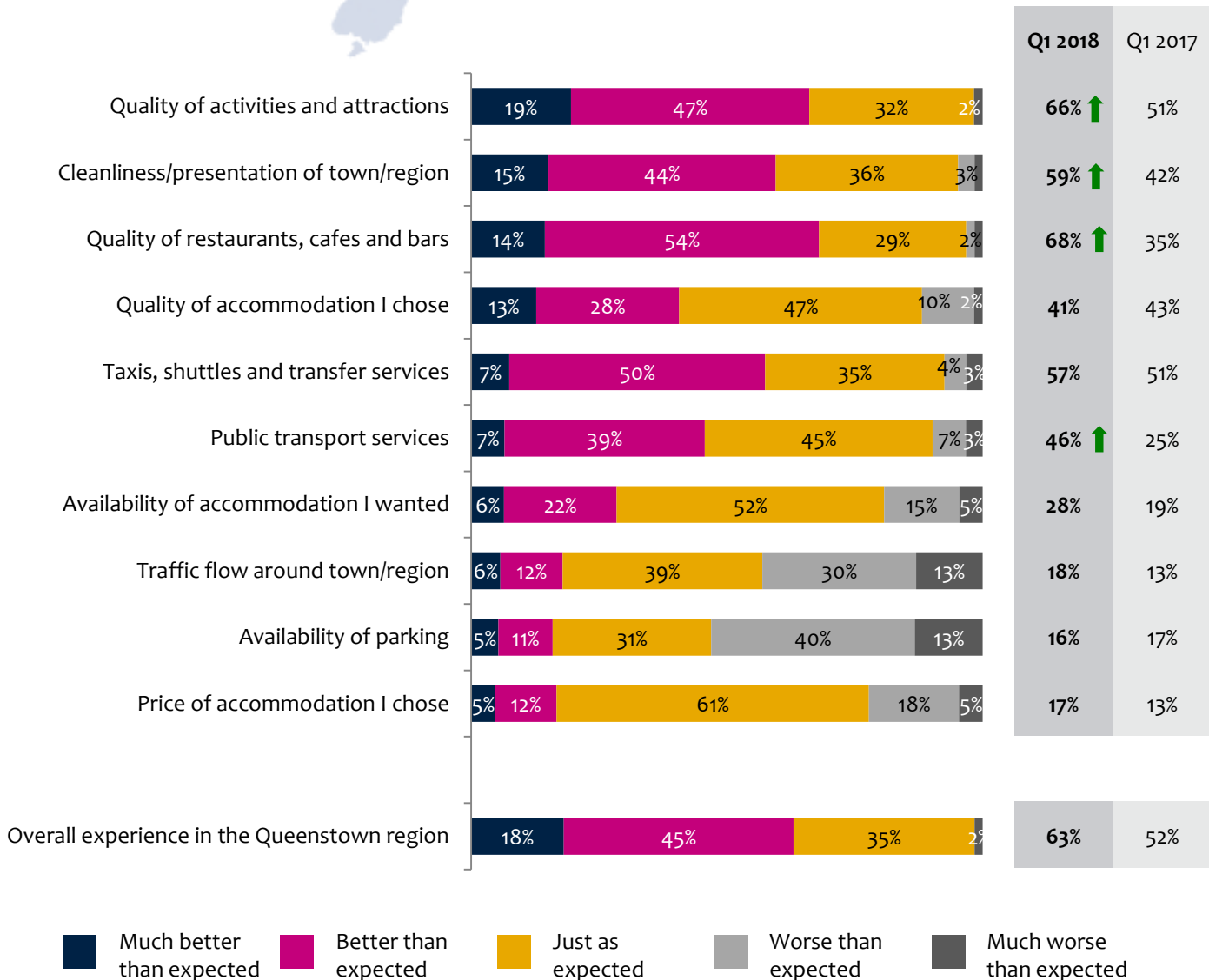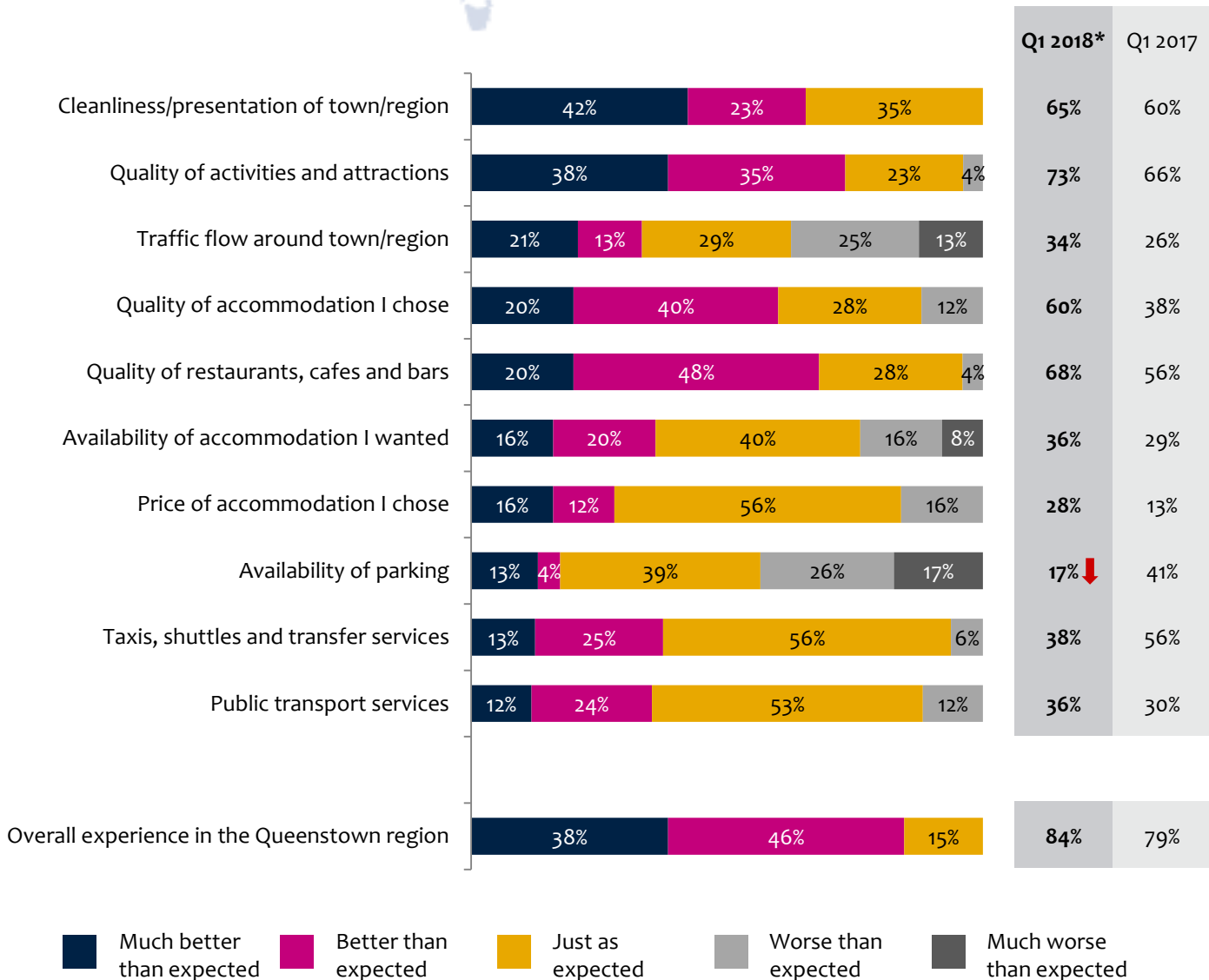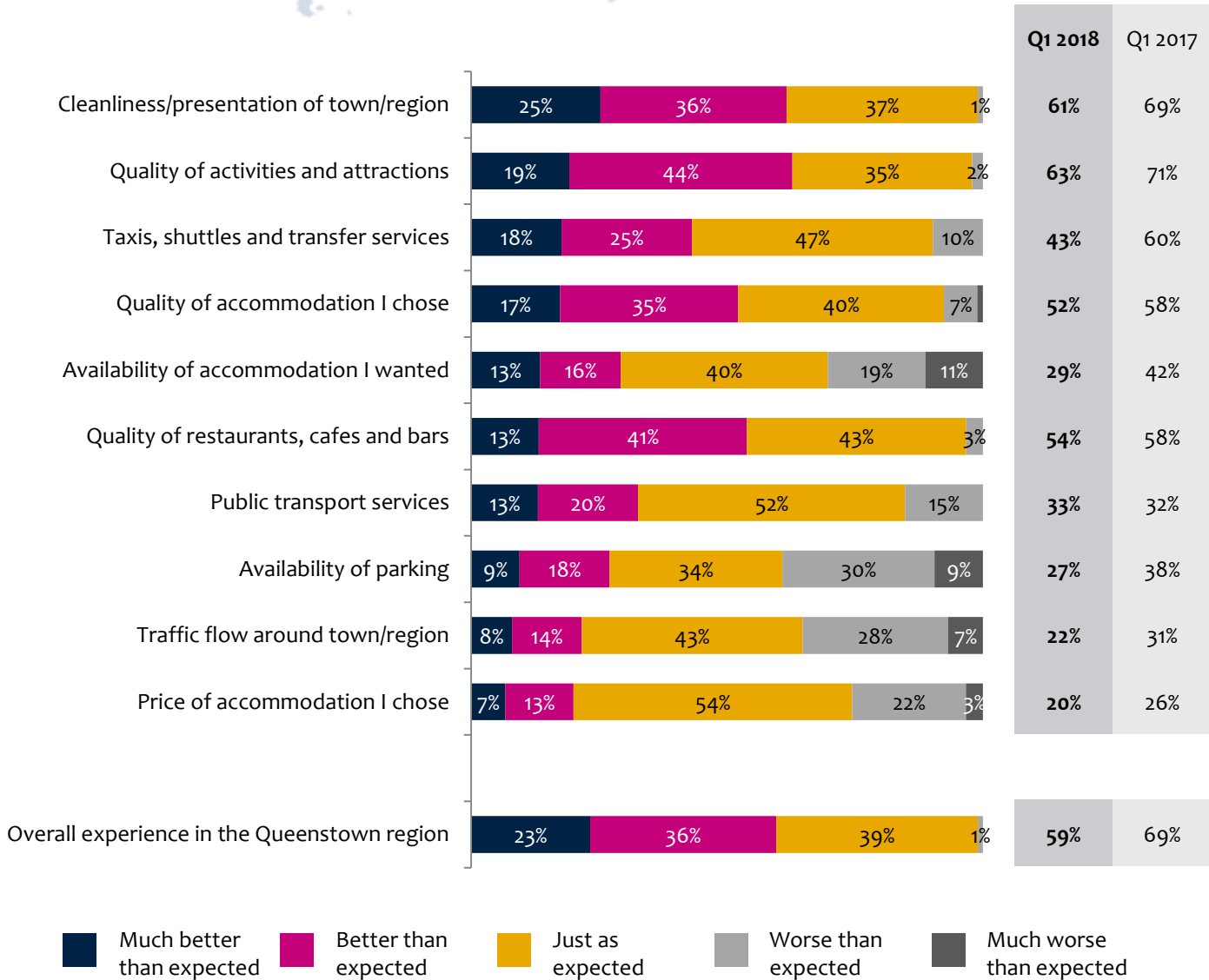**Small sample size (n=>30)*

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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?
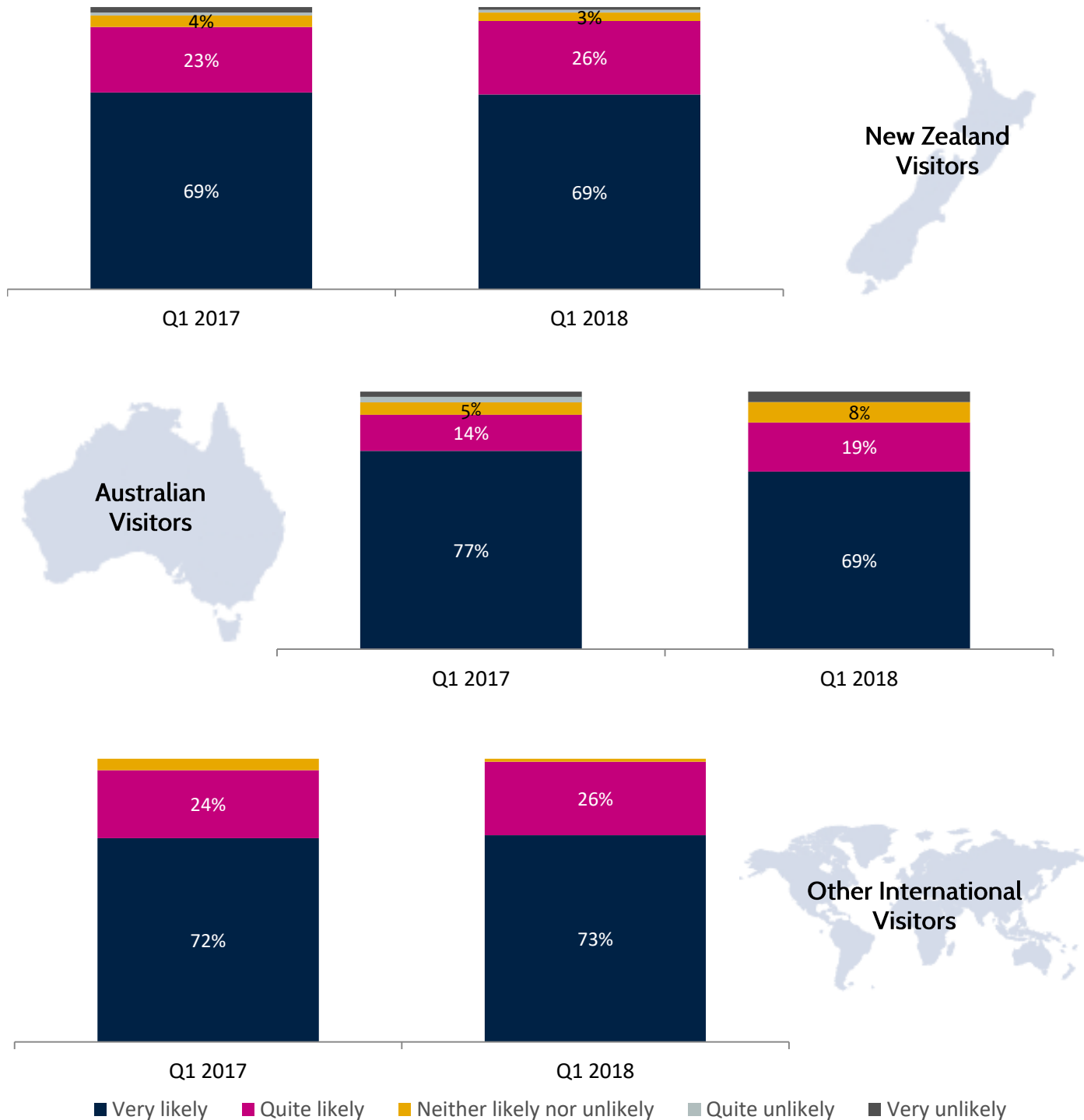
Other International Visitors

Better than expected (Top 2 Box)

Aspect	Much better	Better	Just as	Worse	Much worse	Q1 2018	Q1 2017
Cleanliness/presentation of town/region	25%	36%	37%	1%		**61%**	69%
Quality of activities and attractions	19%	44%	35%	2%		**63%**	71%
Taxis, shuttles and transfer services	18%	25%	47%	10%		**43%**	60%
Quality of accommodation I chose	17%	35%	40%	7%		**52%**	58%
Availability of accommodation I wanted	13%	16%	40%	19%	11%	**29%**	42%
Quality of restaurants, cafes and bars	13%	41%	43%	3%		**54%**	58%
Public transport services	13%	20%	52%	15%		**33%**	32%
Availability of parking	9%	18%	34%	30%	9%	**27%**	38%
Traffic flow around town/region	8%	14%	43%	28%	7%	**22%**	31%
Price of accommodation I chose	7%	13%	54%	22%	3%	**20%**	26%
Overall experience in the Queenstown region	23%	36%	39%	1%		**59%**	69%

Legend:
- Much better than expected
- Better than expected
- Just as expected
- Worse than expected
- Much worse than expected

NB: Please note that respondents answering "N/A" have been excluded from the above chart

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PROPENSITY TO RECOMMEND QUEENSTOWN

New Zealand Visitors

Q1 2017: Very likely 69%, Quite likely 23%, Neither likely nor unlikely 4%
Q1 2018: Very likely 69%, Quite likely 26%, 3%

Australian Visitors

Q1 2017: Very likely 77%, Quite likely 14%, Neither likely nor unlikely 5%
Q1 2018: Very likely 69%, Quite likely 19%, 8%

Other International Visitors

Q1 2017: Very likely 72%, Quite likely 24%
Q1 2018: Very likely 73%, Quite likely 26%

■ Very likely ■ Quite likely ■ Neither likely nor unlikely ■ Quite unlikely ■ Very unlikely

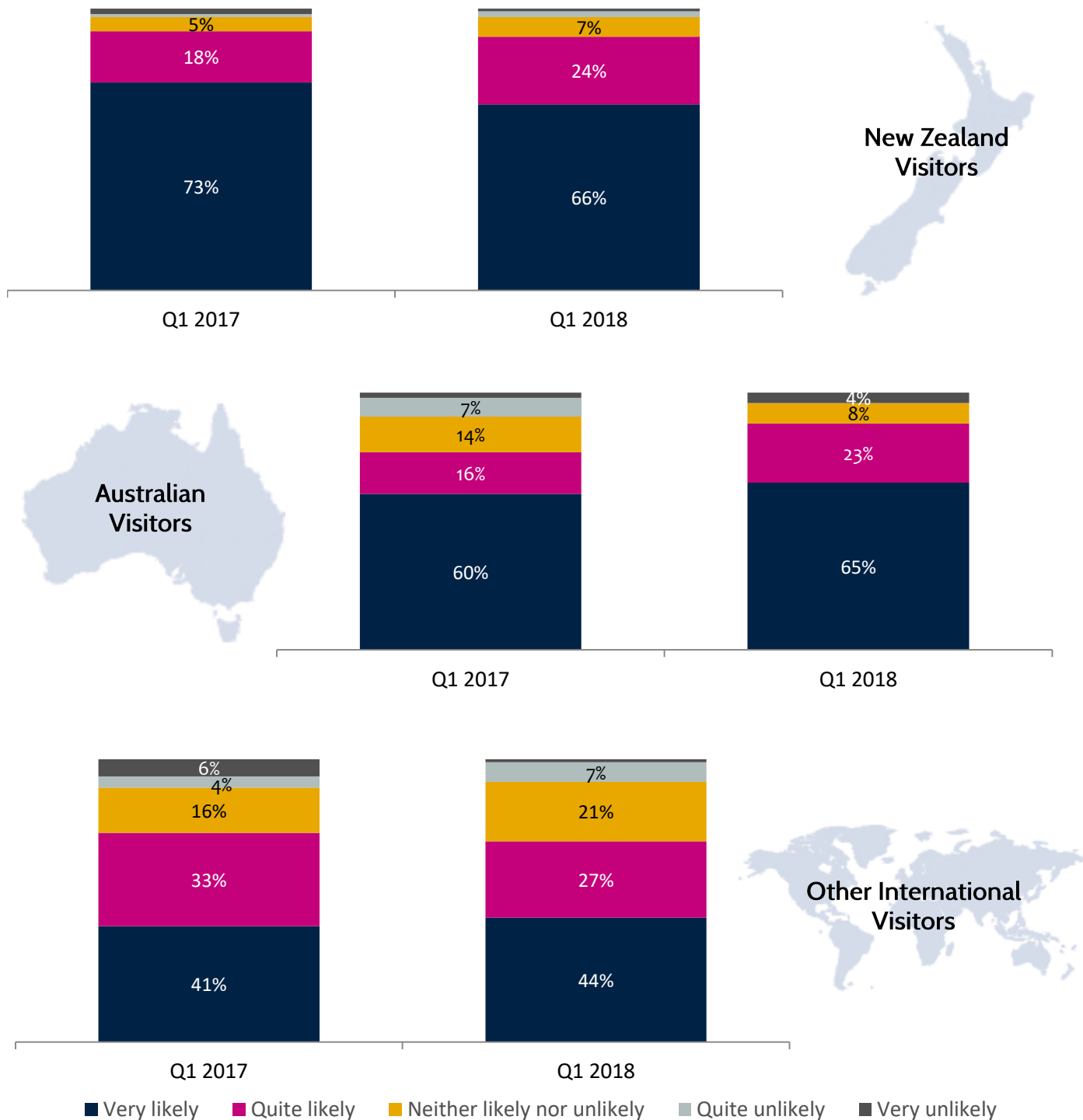*No significant changes for any market versus Q1 2017*
Base: New Zealand (n=127); Australia (n=26); Other International (n=100)*
Small sample size (n=>30)

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PROPENSITY TO RETURN TO QUEENSTOWN

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

New Zealand Visitors

Q1 2017
- 73% Very likely
- 18% Quite likely
- 5% Neither likely nor unlikely

Q1 2018
- 66% Very likely
- 24% Quite likely
- 7% Neither likely nor unlikely

Australian Visitors

Q1 2017
- 60% Very likely
- 16% Quite likely
- 14% Neither likely nor unlikely
- 7% Quite unlikely

Q1 2018
- 65% Very likely
- 23% Quite likely
- 8% Neither likely nor unlikely
- 4% Quite unlikely

Other International Visitors

Q1 2017
- 41% Very likely
- 33% Quite likely
- 16% Neither likely nor unlikely
- 4% Quite unlikely
- 6% Very unlikely

Q1 2018
- 44% Very likely
- 27% Quite likely
- 21% Neither likely nor unlikely
- 7% Quite unlikely

Legend: ■ Very likely ■ Quite likely ■ Neither likely nor unlikely ■ Quite unlikely ■ Very unlikely

No significant changes for any market versus Q1 2017
Base: New Zealand (n=127); Australia (n=26)*; Other International (n=100)
*Small sample size (n=>30)

DEMOGRAPHICS

Gender	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
Male	**50%**	51%	**46%**	58%	**50%**	45%
Female	**50%**	49%	**54%**	42%	**50%**	55%

Age	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
15-17 years	**2%**	0%	**0%**	2%	**1%**	0%
18-19 years	**8%**	3%	**4%**	0%	**8%**	1%
20-24 years	**27%**	10%	**23%**	12%	**20%**	12%
25-29 years	**17%**	7%	**15%**	16%	**25%**	20%
30-34 years	**19%**	17%	**15%**	7%	**16%**	13%
35-39 years	**10%**	10%	**8%**	7%	**5%**	12%
40-44 years	**6%**	10%	**4%**	14%	**2%**	2%
45-49 years	**6%**	10%	**8%**	14%	**1%**	2%
50-54 years	**2%**	6%	**4%**	5%	**5%**	6%
55-59 years	**4%**	10%	**8%**	14%	**6%**	7%
60-64 years	**0%**	5%	**8%**	0%	**5%**	11%
65-69 years	**1%**	4%	**4%**	5%	**4%**	5%
70-74 years	**0%**	3%	**0%**	2%	**0%**	7%
75+ years	**0%**	2%	**0%**	2%	**1%**	0%
Would rather not say	**0%**	1%	**0%**	0%	**1%**	0%

Previous Visits to Queenstown	New Zealand		Australia		Other International	
	Q1 2018	Q1 2017	**Q1 2018**	Q1 2017	**Q1 2018**	Q1 2017
None (First Visit to Queenstown)	**31%**	17%	**65%**	70%	**82%**	83%
1-5 Previous Visits	**50%**	51%	**30%**	28%	**14%**	16%
6-10 Previous Visits	**10%**	12%	**4%**	0%	**1%**	1%
11-20 Previous Visits	**6%**	10%	**0%**	2%	**2%**	0%
21+ Previous Visits	**4%**	10%	**0%**	0%	**1%**	0%
Base: Total Sample	(127)	(134)	(26)	(43)	(100)	(82)

DEMOGRAPHICS

Region of Residence (New Zealand)

	Q1 2018	Q1 2017
Northland	6%	4%
Auckland	39%	36%
Waikato	5%	2%
Bay of Plenty	2%	5%
Gisborne	1%	0%
Hawkes Bay	1%	1%
Taranaki	6%	0%
Manawatu/Whanganui	2%	1%
Wellington (& Wairarapa)	8%	13%
Marlborough	0%	0%
Nelson	2%	0%
Tasman	1%	1%
West Coast	3%	1%
Canterbury	6%	21%
Otago	14%	5%
Southland	6%	8%
Base: New Zealand	(127)	(134)

Country of Origin (Other International)

	Q1 2018	Q1 2017
United States	20%	19%
United Kingdom	26%	22%
China	6%	3%
Germany	6%	11%
India	6%	5%
Canada	2%	5%
Malaysia	1%	0%
Brazil	0%	7%
Argentina	4%	4%
Japan	4%	1%
Korea, Republic Of	2%	1%
Netherlands	5%	2%
Singapore	1%	0%
Thailand	0%	1%
France	2%	2%
Other	17%	14%
Base: Other International	(100)	(82)

Region of Residence (Australia)

	Q1 2018	Q1 2017
Australian Capital Territory	4%	5%
New South Wales	50%	51%
Northern Territory	0%	0%
Queensland	12%	21%
South Australia	8%	5%
Tasmania	0%	0%
Victoria	27%	12%
Western Australia	0%	7%
Base: Australia	(26)	(43)

Please note a small Australian Q1 2018 sample size (n=>30)

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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

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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 +/- 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 +/-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.