



VISITOR INSIGHTS PROGRAMME  
VISITOR EXPERIENCE  
QUEENSTOWN

Q2 2017 (APRIL - JUNE)

### **MOTIVATORS TO VISIT:**

While the majority of visitors to Queenstown in Q2 2017 were in the region for a holiday/vacation or short-break, the proportion of domestic visitors in the region for business reasons was the highest it has been for the past few years.

Different markets are attracted to Queenstown for different reasons, although the novelty value (to explore and discover uniquely different places and experiences) appears a common theme in Q2. Relationship enhancement/bonding (spending time with family, friends or partners) is another key motivator for the domestic market, with limited seasonal fluctuations. Visiting a must see destination that people talked about was the strongest travel motivator for Australian visitors in Q2, while opportunities to experience adventure and excitement was the biggest drawcard for other international visitors. For the domestic and Australian markets the need for adventure & excitement appears to be stronger in the Winter ski season months.

The domestic market are significantly less likely to consider other regions when planning their trip to Queenstown and the proportion who do consider other regions appears to be declining. The activities/attractions available in Queenstown and the natural environment/scenery are the two primary drivers of destination choice across markets for those who considered visiting other regions.

### **TRAVEL BEHAVIOUR:**

Domestic and Australian visitors appear to be booking their trip (e.g. flights and/or accommodation) to Queenstown further in advance, with a significantly higher proportion booking six months or more prior to arrival than this time a year ago. For other international visitors Queenstown tends to be part of a bigger trip around New Zealand and they are more likely to leave their booking until the last minute, with almost 1 in 4 not making any bookings until the week before arriving in Queenstown. Domestic visitors appear to be staying longer in Queenstown in this off-peak season (May-June) compared to other times of the year, this trend was also seen in 2016.

The most popular experiences in Queenstown include restaurants, cafes and bars/nightclubs, the Skyline Gondola and lookout, sightseeing, and walking/hiking.

### **SATISFACTION WITH VISITOR EXPERIENCE:**

Visitors are generally very satisfied with their experience in Queenstown, especially with the quality of activities and attractions available, the quality of restaurants, cafes and bars, and the overall cleanliness of the town. However, there continues to be room for improvement with traffic flow and availability of car parking and with local transport options and services – the two lowest rated measures across all three visitor markets.

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	52%	86%	87%
Family or friends	5%	9%	6%
Business reasons	17%	3%	0%
Event held by friends or family	6%	3%	0%
Transport connection/just passing through	8%	0%	1%
Conference or convention	7%	0%	1%
Event held by someone else	2%	0%	3%
Education/study	2%	0%	0%
Other	2%	0%	2%
<i>Base: Total Sample</i>	<i>(n=125)</i>	<i>(n=35)</i>	<i>(n=90)</i>

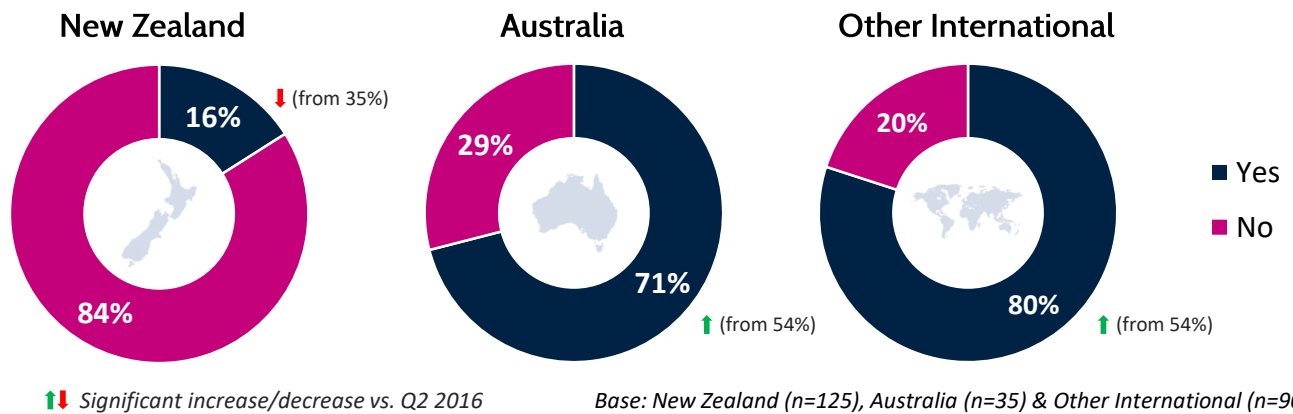
## TRAVEL MOTIVATIONS

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	43%	37%	42%
Visit a must-see destination that people talk about	31%	43%	26%
Relax, recharge and feel refreshed	32%	37%	26%
Experience adventure and excitement	23%	23%	44%
Spend time with my family, friends, or partner	40%	20%	18%
Escape from the routine and pressures of everyday life	29%	27%	13%
Meet new people and share experiences	5%	3%	4%
Indulge in comfort and be pampered	9%	3%	0%
None of the above	0%	3%	0%
<i>Base: Visitors on Holiday/Vacation or Short Break</i>	<i>(n=65)</i>	<i>(n=30)</i>	<i>(n=78)</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
Activities/experiences available in Queenstown	45%	67%	48%
Queenstown's natural environment/scenery	45%	45%	55%
Recommendations by family or friends	11%	24%	19%
Convenient travel options to get to/from Queenstown	15%	21%	11%
Queenstown's reputation as a safe and secure destination	10%	18%	9%
Stories or promotions I saw/heard about Queenstown	7%	12%	15%
Queenstown's restaurants, cafés, nightlife or shopping	15%	6%	10%
Queenstown's people/culture	4%	15%	10%
Queenstown's wine/wineries	17%	9%	2%
Queenstown's weather, climate or seasons	11%	3%	11%
Accommodation options available in Queenstown	10%	6%	6%
Family or friends I wanted to visit in Queenstown	8%	6%	6%
A special deal offered on transport/activities/accommodation	13%	0%	2%
Recommendations by a travel advisor (e.g. a travel agent)	3%	3%	8%
An event, concert or festival held in Queenstown	3%	6%	1%
Other	3%	3%	1%
None of the above	6%	3%	4%
<i>Base: Visitors on Holiday/Vacation or Short Break or Considered Visiting Alternative Region</i>	<i>(n=71)</i>	<i>(n=33)</i>	<i>(n=89)</i>

# EXPECTATIONS OF QUEENSTOWN

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

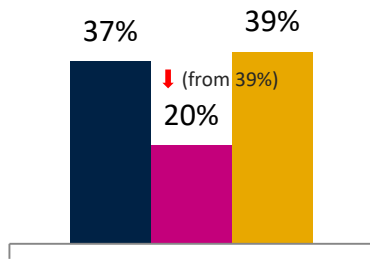
Expectations of Queenstown [Multiple Response]	New Zealand	Australia	Other International
Beautiful natural landscapes and scenery	78%	80%	74%
Adventure and excitement	54%	46%	60%
A clean and unpolluted environment	49%	43%	44%
A safe and secure place to visit	45%	49%	38%
Friendly local people	40%	51%	39%
A relaxing place to visit	50%	40%	37%
An appealing cityscape/townscape	46%	40%	39%
Good food and wine	48%	46%	23%
A vibrant urban environment	22%	26%	26%
Good weather	28%	11%	18%
Unique history or heritage sites	26%	20%	9%
Unique wildlife	9%	23%	16%
Unique bush or plants	12%	17%	8%
An authentic culture	10%	17%	9%
None of the above	0%	0%	0%
<i>Base: Total Sample</i>	<i>(n=125)</i>	<i>(n=35)</i>	<i>(n=90)</i>



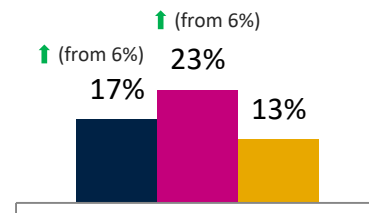
# TIME BETWEEN BOOKING AND ARRIVAL

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



## 6 months +



New Zealand
  Australia
  Other International

↑↓ Significant increase/decrease vs. Q2 2016

Booking to Arrival Lag [Single Response]	New Zealand	Australia	Other International
I didn't book anything before I arrived	1%	0%	1%
Less than a week	16%	11%	22%
One week to a month	21%	9%	17%
1 month	14%	9%	9%
2 months	16%	23%	18%
3 months	13%	11%	8%
4 months	2%	6%	6%
5 months	2%	9%	7%
6 months	5%	11%	8%
7 months	2%	0%	0%
8 months	0%	0%	0%
9 months	2%	0%	3%
10 months	0%	0%	1%
11 months	1%	0%	0%
12 months	2%	6%	1%
Between one and two years	3%	3%	0%
Between two and five years	1%	3%	0%
More than five years	1%	0%	0%
<i>Base: Total Sample</i>	<i>(n=125)</i>	<i>(n=35)</i>	<i>(n=90)</i>

# TRAVEL COMPANIONS

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



## Solo

New Zealand: 27%  
Australia: 9%  
Other International: 19%



## Couple (2 People)

New Zealand: 42%  
Australia: 54%  
Other International: 30%



## Group (3+ people)

New Zealand: 30%  
Australia: 37%  
Other International: 40%

Travel Companions [Multiple Response]	New Zealand	Australia	Other International
No-one, I am travelling on my own	27%	9%	19%
My partner/spouse	46%	57%	40%
My child or children	8%	14%	11%
Other members of my family	16%	14%	14%
A friend or friends	10%	23%	22%
Work/business colleagues	7%	3%	1%
Other members of a tour group	2%	0%	3%
Other members of an organised group	0%	0%	0%
Other people	0%	0%	0%
<i>Base: Total Sample</i>	<i>(n=125)</i>	<i>(n=35)</i>	<i>(n=90)</i>

## Average Size of Travel Group

### New Zealand

3.2 Adults  
0.2 Children

### Australia

3.5 Adults  
0.2 Children

### Other International

4.8 Adults  
0.5 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?



**New Zealand Visitors:**  
Average **8** nights spent in Queenstown  
of a 10 night trip



**Australian Visitors:**  
Average **4** nights spent in Queenstown  
of an 10 night trip



**Other International Visitors:**  
Average **5** nights spent in Queenstown  
of a 28 night trip

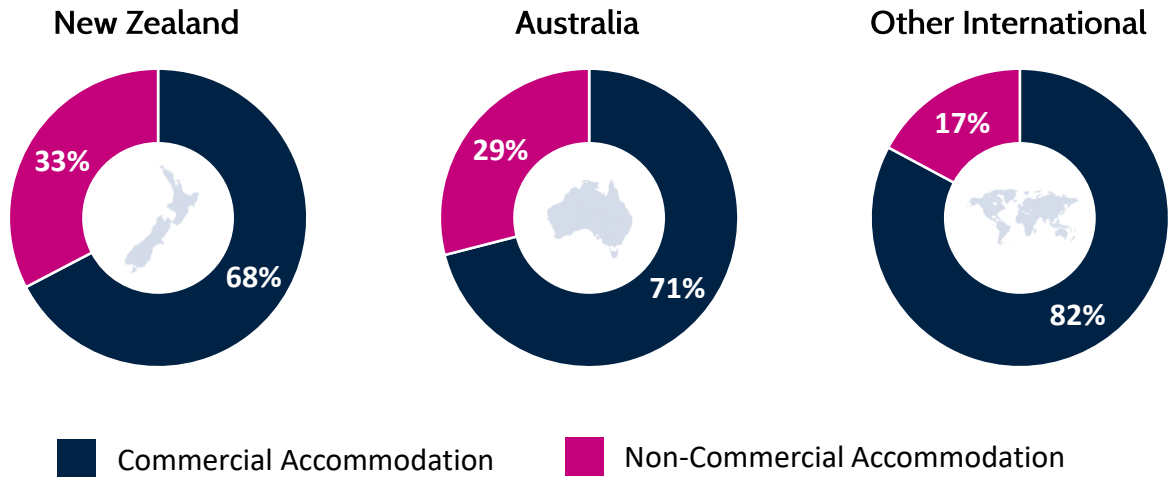


Base: New Zealand (n=125); Australia (n=35); Other International (n=90)



# ACCOMMODATION

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



Main Accommodation [Single Response]	New Zealand	Australia	Other International
<b>Commercial Accommodation</b>			
Hotel	38%	31%	36%
Motel	10%	11%	8%
Serviced apartment	8%	3%	3%
Backpackers/hostel	5%	6%	24%
Exclusive/luxury lodge	5%	3%	1%
Camping ground/holiday park	2%	17%	10%
<b>Non-Commercial Accommodation</b>			
Private home/holiday home - no payment made	12%	6%	3%
Private home/holiday home - rented	10%	11%	4%
Bed/room in a private home - rented (e.g. Airbnb)	3%	9%	6%
Bed and Breakfast	1%	0%	2%
Homestay or Farmstay	0%	0%	0%
National Park DoC hut or tent site	0%	3%	0%
Freedom camping (tent, campervan etc.)	0%	0%	2%
Other	7%	0%	0%
<i>Base: Total Sample</i>	<i>(n=125)</i>	<i>(n=35)</i>	<i>(n=90)</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	61%	49%	51%
Skyline Gondola and lookout	44%	60%	57%
Sightseeing (on foot, by road, cable car, or rail – independently or on a tour – including popular attractions)	45%	60%	41%
Walking, hiking, climbing, trekking, tramping	24%	43%	50%
A visit to Arrowtown	42%	40%	29%
A visit to Fiordland/Milford Sound	17%	37%	39%
Shopping	43%	23%	26%
River and lake adventures (e.g. jetboating, rafting)	16%	31%	23%
Lake cruising or boating (including fishing, water skiing)	18%	26%	22%
A visit to Glenorchy	21%	23%	22%
Extreme activities (bungy, canyon swings, skydiving)	11%	11%	31%
Wineries or other wine experiences	18%	23%	12%
Viewing, learning about or interacting with birds or animals	8%	14%	16%
Art galleries, museums, historic buildings or sites or other cultural or heritage attractions	10%	14%	9%
Wellness experiences	9%	17%	4%
Flying/air activities	6%	11%	11%
Lord of the Rings, Hobbit or other film-related sightseeing tours and activities	2%	14%	11%
Ski, snow, ice activities	10%	9%	7%
Cycling/biking	6%	9%	8%
Other soft adventure or sports activities (such as horse riding)	3%	9%	10%
Event, concert or festivals	10%	3%	4%
Golf	2%	9%	1%
None of the above	8%	3%	0%
<i>Base: Total Sample</i>	<i>(n=125)</i>	<i>(n=35)</i>	<i>(n=90)</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	Q2 2015	Q2 2016	Q2 2017
Accommodation	8.4	8.2	8.2
Transport to Queenstown	8.4	8.3	8.0
Local transport options and services	8.1	7.8	7.7
Traffic and car parking	6.1*	6.5*	5.8
Public facilities (parks, toilets)			8.4
Natural environment	-	-	9.3
Cleanliness/presentation of town/region	8.8	8.6	8.7
Activities and attractions	8.9	8.4	8.9
Restaurants, cafes and bars in Queenstown	8.8	8.4	8.4
Overall experience in the Queenstown region	9.0	8.6	8.8
Australia	Q2 2015	Q2 2016	Q2 2017
Accommodation	8.7	8.7	8.4
Transport to Queenstown	8.5	8.6	8.7
Local transport options and services	7.7	8.2	7.8
Traffic and car parking	7.2*	6.8*	6.4
Public facilities (parks, toilets)			8.8
Natural environment	-	-	9.7
Cleanliness/presentation of town/region	9.1	9.2	9.1
Activities and attractions	9.1	9.1	9.1
Restaurants, cafes and bars in Queenstown	8.9	8.9	8.2
Overall experience in the Queenstown region	9.1	9.1	9.2
Other International	Q2 2015	Q2 2016	Q2 2017
Accommodation	8.0	8.0	8.4
Transport to Queenstown	8.1	7.9	8.5
Local transport options and services	7.3	7.4	7.8
Traffic and car parking	6.8*	6.5*	7.6
Public facilities (parks, toilets)			8.9
Natural environment	-	-	9.6
Cleanliness/presentation of town/region	8.8	9.0	9.3
Activities and attractions	9.0	8.9	9.1
Restaurants, cafes and bars in Queenstown	8.5	8.5	8.7
Overall experience in the Queenstown region	9.0	8.7	9.3

\*Previously 'Parking and other public facilities'

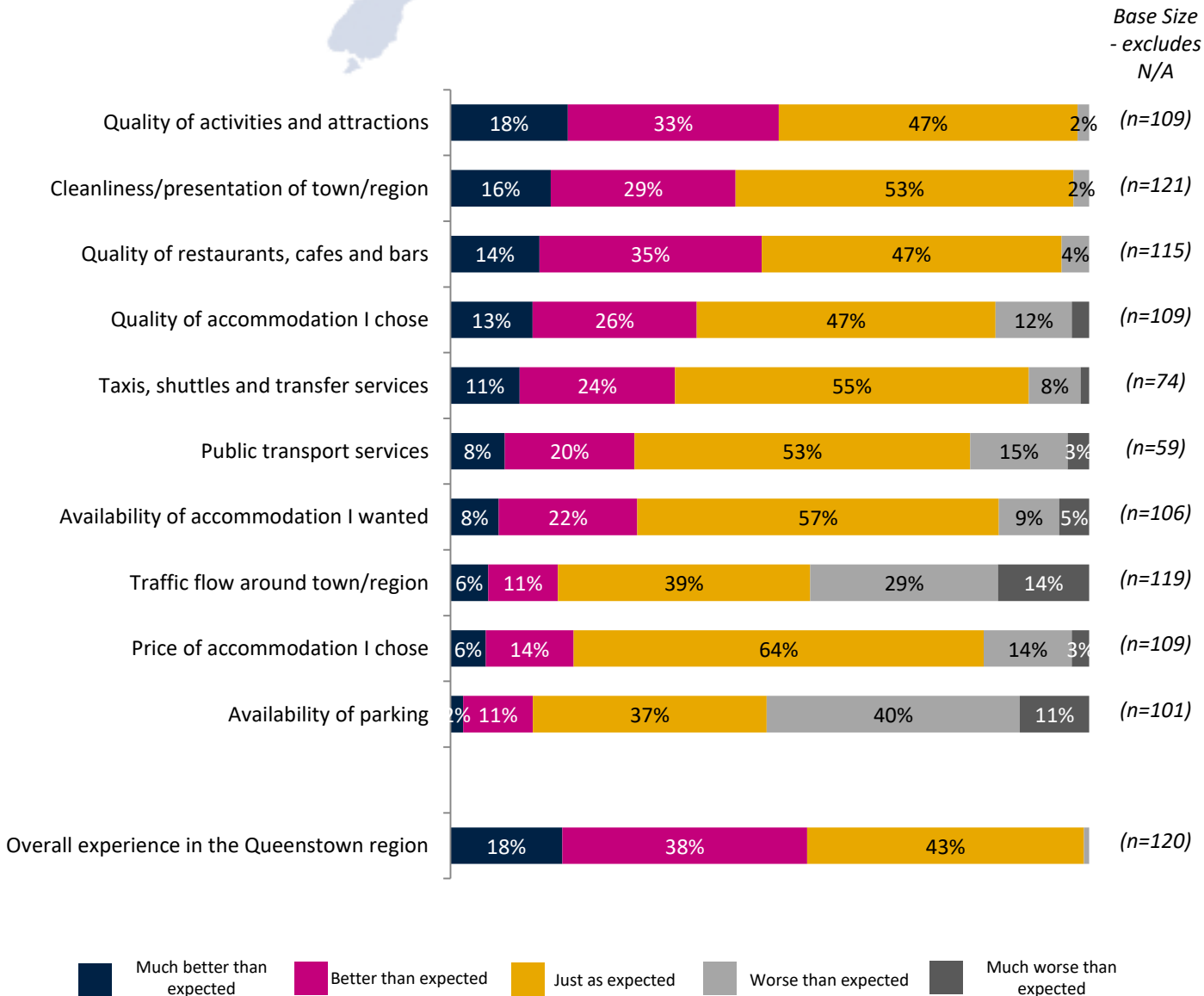


# EXPERIENCE VS. EXPECTATIONS

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



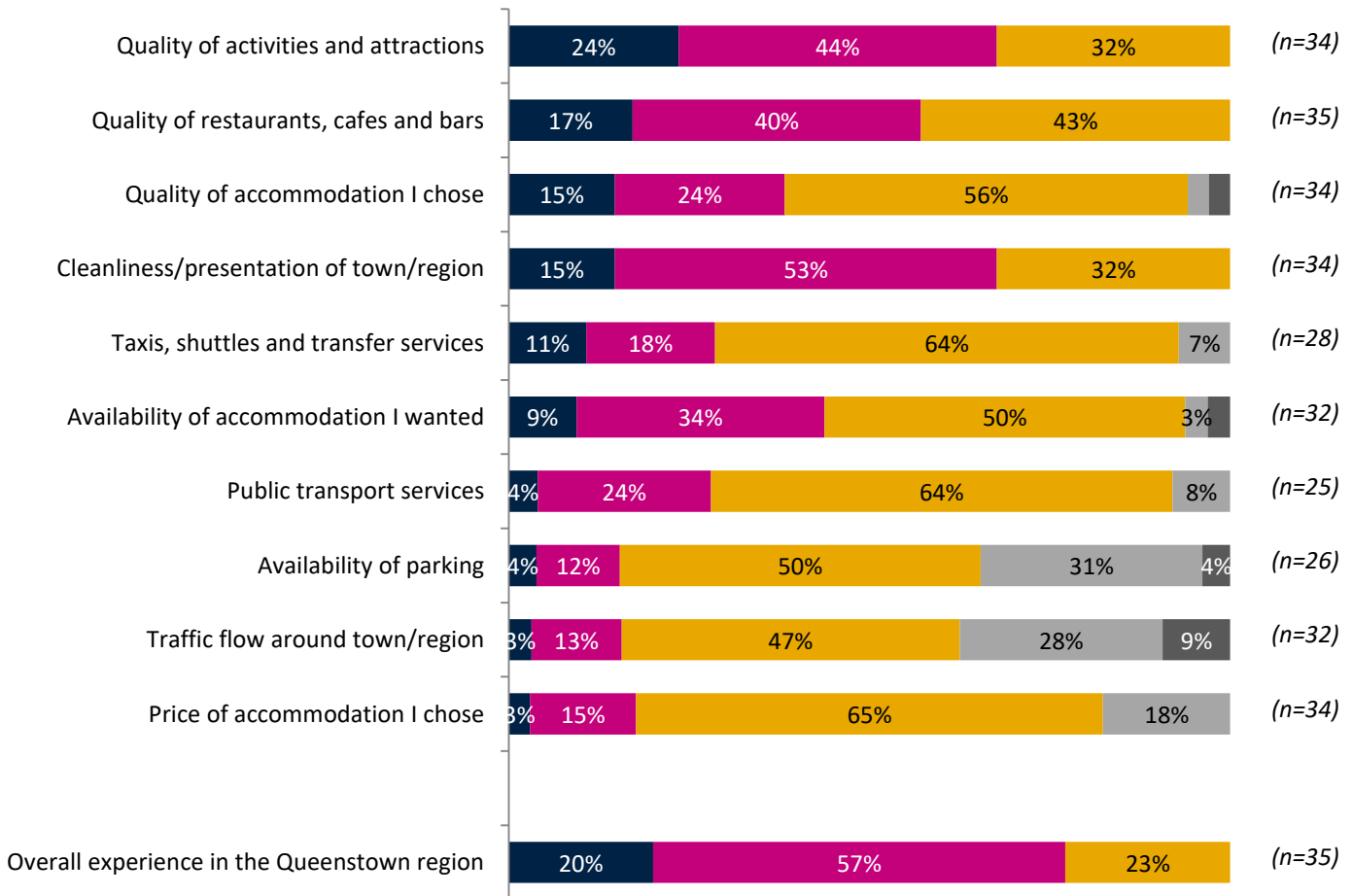
# EXPERIENCE VS. EXPECTATIONS

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

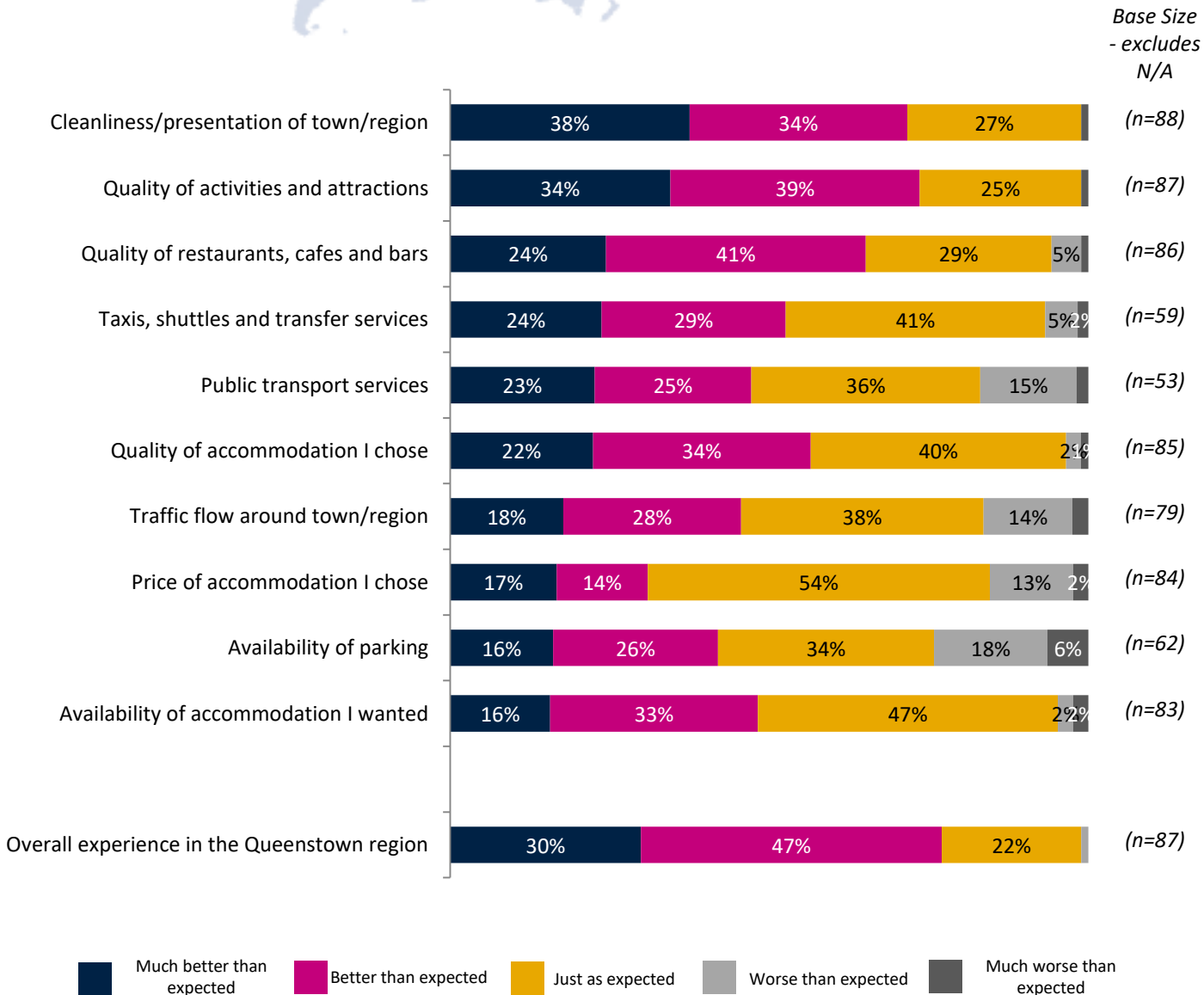


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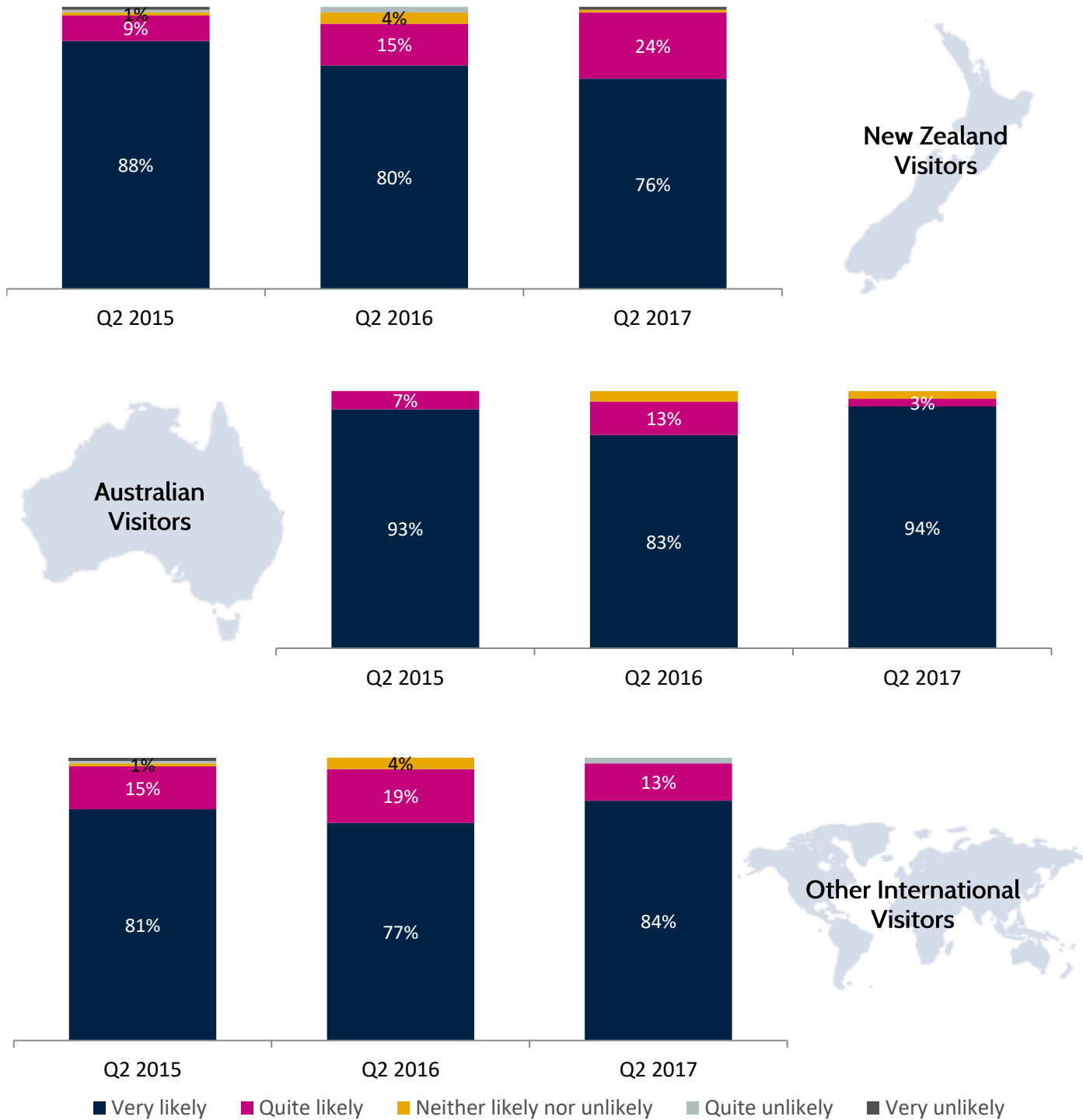


## Other International Visitors



# PROPENSITY TO RECOMMEND QUEENSTOWN

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

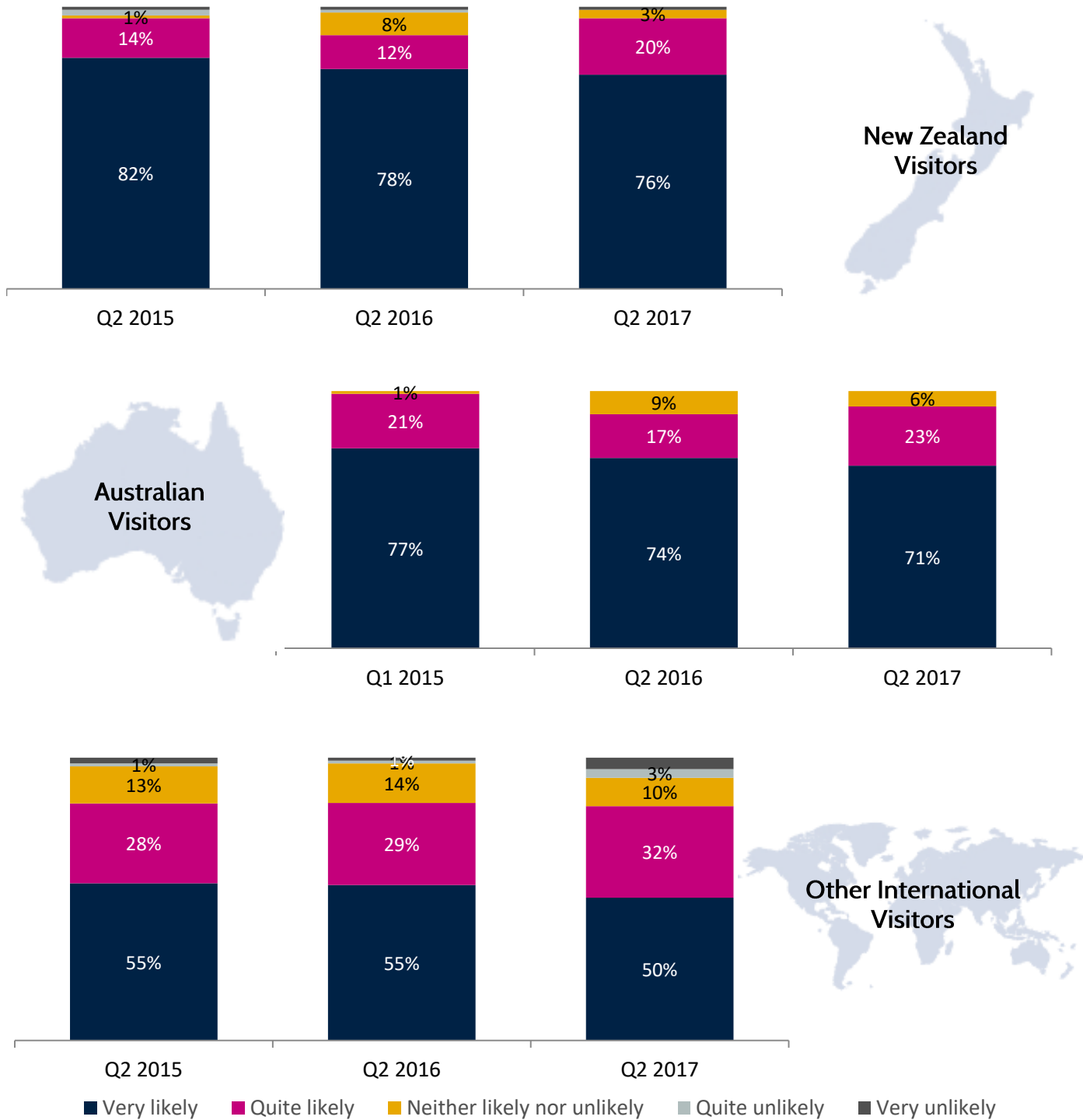


Base: New Zealand (n=125); Australia (n=35); Other International (n=90)



# 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=125); Australia (n=35); Other International (n=90)





# DEMOGRAPHICS

## Sample Profile

Gender	New Zealand	Australia	Other International
Male	50%	60%	46%
Female	50%	40%	53%
Gender Diverse	0%	0%	1%

Age	New Zealand	Australia	Other International
15-17 years	3%	0%	2%
18-19 years	2%	6%	4%
20-24 years	12%	6%	13%
25-29 years	11%	17%	22%
30-34 years	15%	11%	22%
35-39 years	6%	11%	11%
40-44 years	10%	11%	4%
45-49 years	8%	6%	4%
50-54 years	10%	3%	6%
55-59 years	6%	9%	2%
60-64 years	6%	11%	3%
65-69 years	4%	3%	3%
70-74 years	5%	3%	1%
75+ years	3%	3%	0%
Would rather not say	0%	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=125); Australia (n=34); Other International (n=90)



# DEMOGRAPHICS

## Sample Profile

### Region of Residence (New Zealand)

Northland	3%
Auckland	43%
Waikato	8%
Bay of Plenty	2%
Gisborne	1%
Hawkes Bay	2%
Taranaki	2%
Manawatu/Whanganui	2%
Wellington (& Wairarapa)	9%
Marlborough	1%
Nelson	0%
Tasman	0%
West Coast	0%
Canterbury	9%
Otago	10%
Southland	7%
<i>Base: New Zealand (n=125)</i>	

### Region of Residence (Australia)

Australian Capital Territory	3%
New South Wales	40%
Northern Territory	0%
Queensland	14%
South Australia	3%
Tasmania	3%
Victoria	26%
Western Australia	11%
<i>Base: Australia (n=35)</i>	

### Country of Origin (Other International)

Czech Republic	1%
Brazil	2%
Canada	6%
China	6%
Finland	1%
France	1%
Germany	4%
Hong Kong	2%
India	4%
Italy	1%
Japan	2%
Korea, Republic Of	4%
Malaysia	4%
Mexico	1%
Netherlands	1%
Philippines	2%
Singapore	3%
Spain	1%
Sweden	3%
Taiwan	1%
Thailand	9%
United Kingdom	20%
United States	17%
<i>Base: Other International (n=90)</i>	

Base: New Zealand (n=125); Australia (n=35); Other International (n=90)



## 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.