VISITOR INSIGHTS PROGRAMME
VISITOR EXPERIENCE
QUEENSTOWN

Q2 2018 (APRIL – JUNE)

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The Visitor Experience

Overall visitor satisfaction in the Queenstown Region remains very high in Q2 2018; consistent with satisfaction levels in the same quarter last year. Queenstown's natural environment continues to be the most satisfying aspect of the region amongst all three visitor markets, while traffic and car parking still offer the most room for improvement. Propensity to recommend and return to Queenstown also remains high for the three visitor markets this quarter, with a significant increase in the percentage of Other International visitors very likely to return to the region in the future.

In-line with these positive results, experiences exceeded expectations for the majority of visitors across markets. Interestingly, in both the domestic and Australian markets, there was a significant increase in the proportion of visitors who agreed that the quality of accommodation and price of accommodation they stayed in exceeded their expectations. This could be either due to accommodation providers making changes to prices or service delivery in the region over the past year or alternatively a change in expectations over time.

Motivators for Visit

This quarter, the Queenstown region saw a different top travel motivator for each of the three main markets and with each visitor market also having two more notable travel motivators - it suggests a broad appeal for holiday/vacation makers to the region. The natural environment/scenery continues to be the key driver of destination choice for Queenstown, with beautiful natural landscapes and scenery also being the top expectation of the region.

Travel Behaviour

The most notable change in travel behaviour this quarter was the increase in Other International visitors staying in non-commercial accommodation, rather than hotels. It will be interesting to see if this is a one-off occurrence or a more permanent shift towards non-commercial accommodation.

Throughout report, arrows (⬆/⬇) indicate statistically significant increases/decreases vs. Q2 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
62% for a holiday/vacation or short-break	**81%** for a holiday/vacation or short-break	**71%** for a holiday/vacation or short-break
9% for other business reasons	**10%** to attend an event held by friends or family	**7%** for other business reasons
6% to attend an event held by friends or family	**3%** to visit family or friends	**7%** for education/study
6% to visit family or friends	**3%** for education/study	**5%** to visit family or friends

Main Reason for Visit [Single Response]	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	**Q2 2018**	Q2 2017	**Q2 2018**	Q2 2017
Holiday/vacation or short-break	**62%**	52%	**81%**	86%	**71%** ⬇	87%
Other business reasons	**9%**	17%	**0%**	3%	**7%** ⬆	0%
Event held by friends or family	**6%**	6%	**10%**	3%	**0%**	0%
Visit family or friends	**6%**	5%	**3%**	9%	**5%**	6%
Education/study	**1%**	2%	**3%**	0%	**7%** ⬆	0%
Conference or convention	**4%**	7%	**0%**	0%	**1%**	1%
Event held by someone else	**2%**	2%	**0%**	0%	**1%**	3%
Transport connection/just passing through	**3%**	8%	**0%**	0%	**0%**	1%
Other	**7%**	2%	**3%**	0%	**7%**	2%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

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?

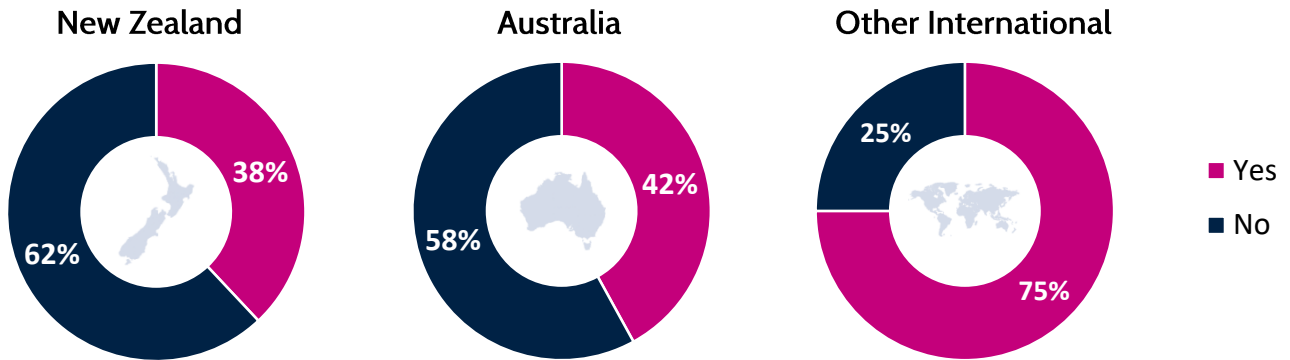| New Zealand	Australia	Other International
41% to spend time with family, friends, or partner	**48%** to explore and discover uniquely different places and experiences	**48%** to visit a must-see destination that people talk about
33% to relax, recharge and feel refreshed	**24%** to relax, recharge and feel refreshed	**39%** to explore and discover uniquely different places and experiences
32% to explore and discover uniquely different places and experiences	**20%** to escape from the routine and pressures of everyday life	**39%** to experience adventure and excitement
24% to escape from the routine and pressures of everyday life	**16%** to visit a must-see destination that people talk about	**25%** to relax, recharge and feel refreshed

Travel Motivations [Multiple Response]	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	**Q2 2018**	Q2 2017	**Q2 2018**	Q2 2017
Explore and discover uniquely different places /experiences	**32%**	43%	**48%**	37%	**39%**	42%
Relax, recharge and feel refreshed	**33%**	32%	**24%**	37%	**25%**	26%
Visit a must-see destination that people talk about	**17%**	31%	**16%**	43%	**48%** ⬆	26%
Experience adventure and excitement	**14%**	23%	**16%**	23%	**39%**	44%
Spend time with my family, friends, or partner	**41%**	40%	**16%**	20%	**12%**	18%
Escape from the routine and pressures of everyday life	**24%**	29%	**20%**	27%	**16%**	13%
Meet new people and share experiences	**12%**	5%	**8%**	3%	**17%** ⬆	4%
Indulge in comfort and be pampered	**7%**	9%	**8%**	3%	**1%**	0%
None of the above	**7%**	0%	**0%**	3%	**0%**	0%
Base: Visitors on Holiday/Vacation or Short Break	(76)	(65)	(25)*	(30)	(69)	(78)

Small sample size (n=>30)

DRIVERS OF DESTINATION CHOICE

New Zealand
38% Yes
62% No

Australia
42% Yes
58% No

Other International
25% No
75% Yes

Legend:
- Yes
- No

Base: New Zealand (n=123), Australia (n=31) & Other International (n=97)

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	
	Q2 2018	Q2 2017	Q2 2018	Q2 2017	Q2 2018	Q2 2017
Natural environment/scenery	42%	45%	68%	45%	59%	55%
Activities/experiences available	35%	45%	48%	67%	38%	48%
Weather, climate, or seasons	20%	11%	24%	3%	21%	11%
Restaurants, cafes, nightlife or shopping	24%	15%	16%	6%	13%	10%
Recommendations by family or friends	14%	11%	20%	24%	18%	19%
People/culture	9%	4%	16%	15%	12%	10%
Reputation as a safe and secure destination	11%	10%	12%	18%	6%	9%
Accommodation options available	8%	10%	12%	6%	8%	6%
Wine/wineries	7%	17%	8%	9%	8%	2%
Stories or promotions I saw/heard about Queenstown	2%	7%	12%	12%	8%	15%
Family or friends I wanted to visit	11%	8%	8%	6%	1%	6%
Special deal offered on transport/activities/accommodation	10%	13%	0%	0%	7%	2%
Convenient travel options to get to/from Queenstown	9%	15%	0%	21%	7%	11%
An event, concert or festival	7%	3%	0%	6%	4%	1%
Recommendations by a travel advisor	2%	3%	0%	3%	9%	8%
Other	2%	6%	4%	3%	4%	4%
Base: Visitors on Holiday/Vacation or Short Break or Considered Visiting Alternative Region	(91)	(71)	(25)*	(33)	(90)	(89)

*Small sample size (n=>30)

EXPECTATIONS OF QUEENSTOWN

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

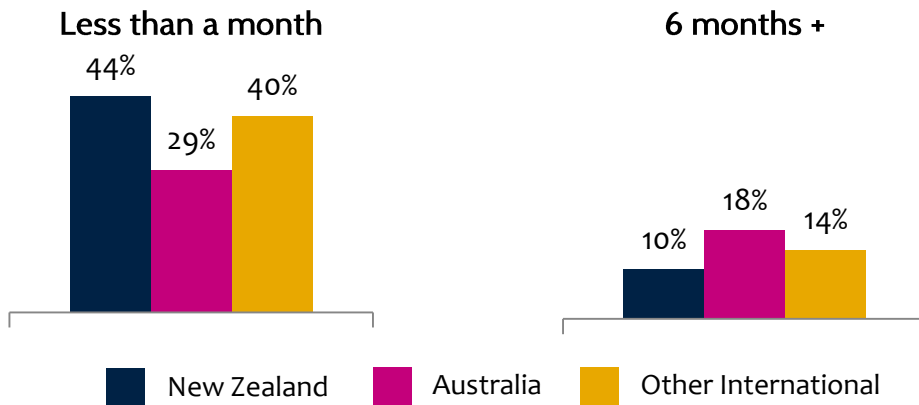| New Zealand	Australia	Other International
72% beautiful natural landscapes and scenery	**81%** beautiful natural landscapes and scenery	**67%** beautiful natural landscapes and scenery
45% a relaxing place to visit	**65%** adventure and excitement	**56%** adventure and excitement
42% adventure and excitement	**58%** a relaxing place to visit	**46%** friendly local people

Expectations of Queenstown [Multiple Response]	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	**Q2 2018**	Q2 2017	**Q2 2018**	Q2 2017
Beautiful natural landscapes and scenery	**72%**	78%	**81%**	80%	**67%**	74%
Adventure and excitement	**42%**	54%	**65%**	46%	**56%**	60%
A relaxing place to visit	**45%**	50%	**58%**	40%	**35%**	37%
A clean and unpolluted environment	**37%**	49%	**55%**	43%	**39%**	44%
Friendly local people	**35%**	40%	**39%**	51%	**46%**	39%
An appealing cityscape/townscape	**40%**	46%	**48%**	40%	**32%**	39%
A safe and secure place to visit	**33%**	45%	**35%**	49%	**33%**	38%
Good food and wine	**41%**	48%	**29%**	46%	**30%**	23%
A vibrant urban environment	**27%**	22%	**19%**	26%	**21%**	26%
Good weather	**20%**	28%	**16%**	11%	**22%**	18%
Unique history or heritage sites	**20%**	26%	**26%**	20%	**8%**	9%
Unique wildlife	**7%**	9%	**23%**	23%	**19%**	16%
An authentic culture	**12%**	10%	**16%**	17%	**14%**	9%
Unique bush or plants	**11%**	12%	**16%**	17%	**9%**	8%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

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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

44% New Zealand
29% Australia
40% Other International

6 months +

10% New Zealand
18% Australia
14% Other International

■ New Zealand ■ Australia ■ Other International

No significant changes for any market versus Q2 2017

Booking to Arrival Lag [Single Response]	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	Q2 2018	Q2 2017	Q2 2018	Q2 2017
I didn't book anything before I arrived	3%	1%	0%	0%	2%	1%
Less than a week	23%	16%	19%	11%	18%	22%
One week to a month	21%	21%	10%	9%	22%	17%
1 month	16%	14%	16%	9%	16%	9%
2 months	15%	16%	3%	23%	13%	18%
3 months	7%	13%	23%	11%	9%	8%
4 months	4%	2%	3%	6%	2%	6%
5 months	2%	2%	6%	9%	3%	7%
6 months	5%	5%	3%	11%	5%	8%
7 months	1%	2%	3%	0%	1%	0%
8 months	0%	0%	3%	0%	1%	0%
9 months	0%	2%	3%	0%	0%	3%
10 months	1%	0%	0%	0%	1%	1%
11 months	0%	1%	0%	0%	2%	0%
12 months	1%	2%	3%	6%	2%	1%
Between one and two years	1%	3%	3%	3%	2%	0%
Between two and five years	1%	1%	0%	3%	0%	0%
More than five years	0%	1%	0%	0%	0%	0%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

TRAVEL COMPANIONS

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

Solo
New Zealand: 19%
Australia: 13%
Other International: 30%

2 People
New Zealand: 40%
Australia: 35%
Other International: 30%

Group (3+ people)
New Zealand: 41%
Australia: 52%
Other International: 39%

Travel Companions [Multiple Response]	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	Q2 2018	Q2 2017	Q2 2018	Q2 2017
No-one, I am travelling on my own	17%	27%	10%	9%	24%	19%
My partner/spouse	51%	46%	65%	57%	40%	40%
My child or children	11%	8%	10%	14%	7%	11%
Other members of my family	15%	16%	16%	14%	11%	14%
A friend or friends	17%	10%	13%	23%	25%	22%
Work/business colleagues	7%	7%	3%	3%	1%	1%
Other members of a tour group	2%	2%	3%	0%	5%	3%
Other members of an organised group	0%	0%	0%	0%	3%	0%
Other people	2%	0%	0%	0%	2%	0%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

Average Size of Travel Group

New Zealand
3.0 Adults
0.5 Children

Australia
4.6 Adults
0.9 Children

Other International
3.7 Adults
0.4 Children

Excludes outliers – travel groups of 50 or more excluded
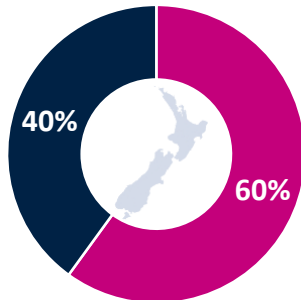
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LENGTH OF CURRENT TRIP

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?

40% **60%**

New Zealand Visitors:
Spent **60%** of their trip in Queenstown,
staying an average of **3.1 nights**

Q2 2017: 3.6 Nights

Australian Visitors:
Spent **54%** of their trip in Queenstown,
staying an average of **5.7 nights**

Q2 2017: 4.2 Nights

46% **54%**

32% **68%**
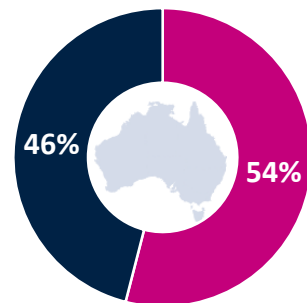
Other International Visitors:
Spent **32%** of their trip in Queenstown,
staying an average of **4.1 nights**

Q2 2017: 3.5 Nights
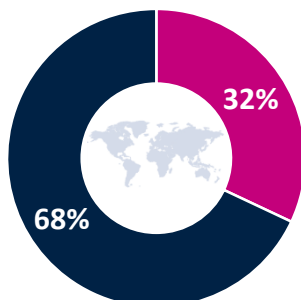
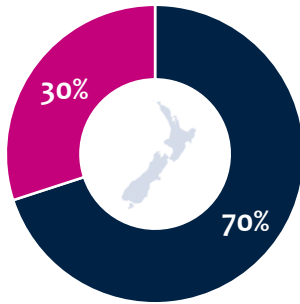*Base - excludes outliers - staying in Queenstown for longer than a month:*
New Zealand (n=123); Australia (n=31); Other International (n=97)

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ACCOMMODATION

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

New Zealand

30%
70%

Australia

29%
70%

Other International

29%
70%
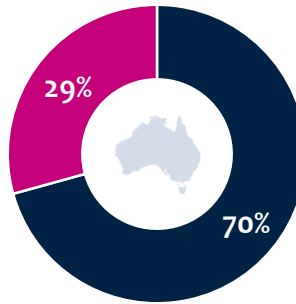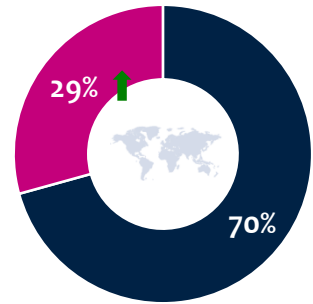
■ Commercial Accommodation   ■ Non-Commercial Accommodation

Main Accommodation [Single Response]	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	Q2 2018	Q2 2017	Q2 2018	Q2 2017
Commercial Accommodation	70%	68%	70%	71%	70%	82%
Hotel	37%	38%	32%	31%	21% ↓	36%
Motel	15%	10%	0%	11%	8%	8%
Serviced apartment	7%	8%	23%	3%	2%	3%
Backpackers/hostel	6%	5%	3%	6%	28%	24%
Exclusive/luxury lodge	3%	5%	6%	3%	2%	1%
Camping ground/holiday park	2%	2%	6%	17%	9%	10%
Non-Commercial Accommodation	30%	33%	29%	29%	29% ↑	17%
Private home/holiday home - no payment made	10%	12%	3%	6%	5%	3%
Private home/holiday home - rented	8%	10%	10%	11%	11%	4%
Bed/room in a private home - rented (e.g. Airbnb)	7%	3%	13%	9%	9%	6%
Bed and Breakfast	1%	1%	0%	0%	2%	2%
Homestay or Farmstay	0%	0%	3%	0%	2%	0%
National Park DoC hut or tent site	0%	0%	0%	3%	0%	0%
Freedom camping (tent, campervan etc.)	0%	0%	0%	0%	0%	2%
Other	4%	7%	0%	0%	0%	0%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

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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	
	Q2 2018	Q2 2017	Q2 2018	Q2 2017	Q2 2018	Q2 2017
Restaurants and cafes, bars/nightclubs	60%	61%	39%	49%	46%	51%
Skyline Gondola and lookout	41%	44%	55%	60%	48%	57%
Sightseeing	45%	45%	52%	60%	39%	41%
A visit to Arrowtown	43%	42%	55%	40%	33%	29%
Shopping	44%	43%	45%	23%	39%	26%
Walking, hiking, climbing, trekking, tramping	26%	24%	29%	43%	43%	50%
Extreme activities	15%	11%	26%	11%	34%	31%
A visit to Fiordland/Milford Sound	8% ↓	17%	29%	37%	37%	39%
River and lake adventures	15%	16%	19%	31%	31%	23%
Lake cruising or boating	18%	18%	26%	26%	20%	22%
Ski, snow, ice activities	11%	10%	29% ↑	9%	16%	7%
A visit to Glenorchy	16%	21%	19%	23%	15%	22%
Art galleries, museums, historic buildings or sites or other cultural or heritage attractions	21% ↑	10%	13%	14%	13%	9%
Wineries or other wine experiences	11%	18%	19%	23%	16%	12%
Wellness experiences	9%	9%	23%	17%	6%	4%
Other soft adventure and sports activities	5%	3%	16%	9%	8%	10%
Lord of the Rings, Hobbit or other film-related sightseeing tours and activities	4%	2%	6%	14%	18%	11%
Viewing, learning about or interacting with birds or animals	2% ↓	8%	10%	14%	15%	16%
Cycling/biking	6%	6%	10%	9%	10%	8%
Flying/air activities	1% ↓	6%	10%	11%	13%	11%
Event, concert or festivals	9%	10%	3%	3%	7%	4%
Golf	3%	2%	3%	9%	3%	1%
None of the above	5%	8%	0%	3%	3%	0%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

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	8.9
New Zealand	2% 2% 28% 68%	8.9
Australian	19% 81%	9.4
Other International	2% 14% 81%	9.3

Legend: ■ 1-2 ■ 3-4 ■ 5-6 ■ 7-8 ■ 9-10
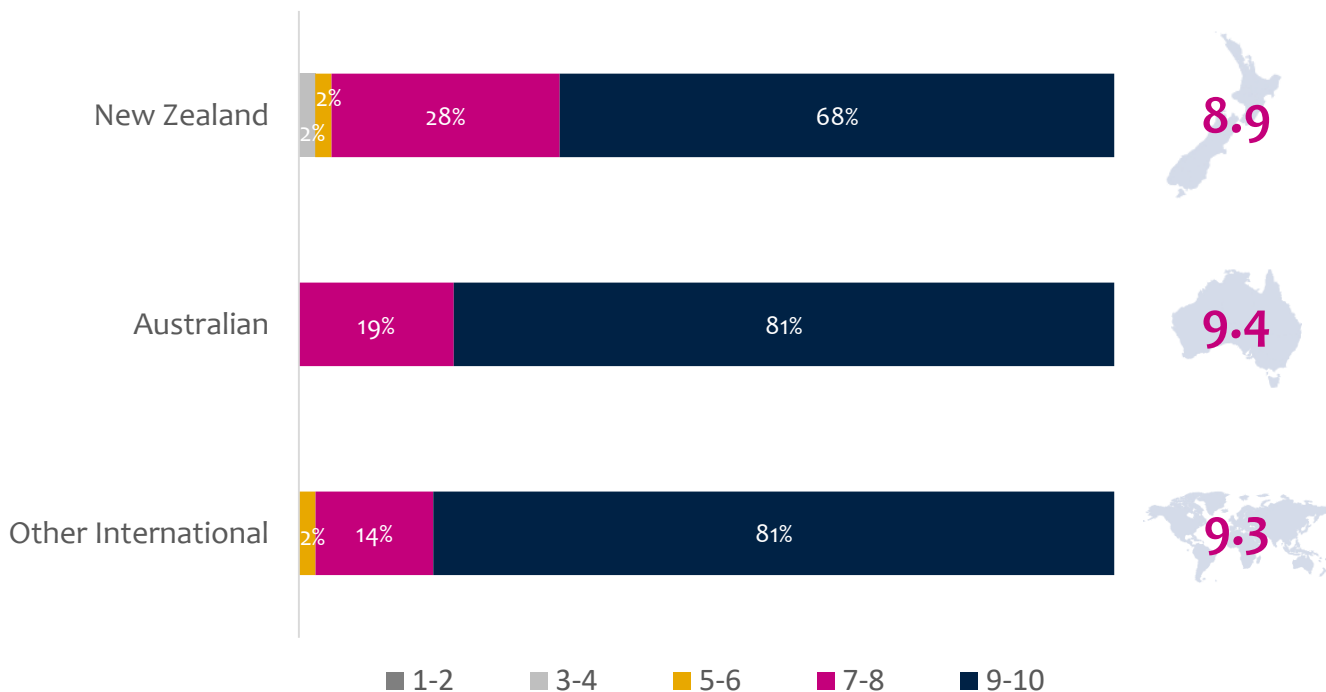
	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	Q2 2018	Q2 2017	Q2 2018	Q2 2017
Accommodation	8.4	8.2	9.2	8.4	8.5	8.4
Transport to Queenstown	8.3	8.0	8.7	8.7	8.8	8.5
Local transport options and services	7.5	7.7	8.5	7.8	8.3	7.8
Traffic and car parking	6.2	5.8	7.5	6.4	7.6	7.6
Public facilities (parks, toilets)	8.3	8.4	9.1	8.8	8.6	8.9
Natural environment	9.2	9.3	9.6	9.7	9.6	9.6
Cleanliness/presentation of town/region	8.7	8.7	9.4	9.1	9.3	9.3
Activities and attractions	8.8	8.9	9.4	9.1	9.3	9.1
Restaurants, cafes and bars in Queenstown	8.6	8.4	8.8	8.2	8.6	8.7
Overall experience in the Queenstown region	8.9	8.8	9.4	9.2	9.3	9.3
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

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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?

New Zealand Visitors

Better than expected (Top 2 Box)

Aspect	Much better	Better	Just as	Worse	Much worse	Q2 2018	Q2 2017
Cleanliness/presentation of town/region	20%	35%	43%	2%		55%	45%
Public transport services	20%	22%	51%	7%		44%	28%
Quality of accommodation I chose	20%	32%	43%	5%		52% ⬆	39%
Quality of activities and attractions	20%	40%	40%			60%	51%
Quality of restaurants, cafes and bars	18%	42%	39%			60%	49%
Availability of accommodation I wanted	18%	23%	53%	5%		41%	30%
Taxis, shuttles and transfer services	15%	35%	48%	2%		50%	35%
Price of accommodation I chose	11%	18%	55%	12%	5%	39% ⬆	20%
Availability of parking	8%	16%	44%	23%	10%	24%	13%
Traffic flow around town/region	8%	28%	37%	22%	6%	36%	17%
Overall experience in the Queenstown region	23%	42%	35%			65%	56%

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
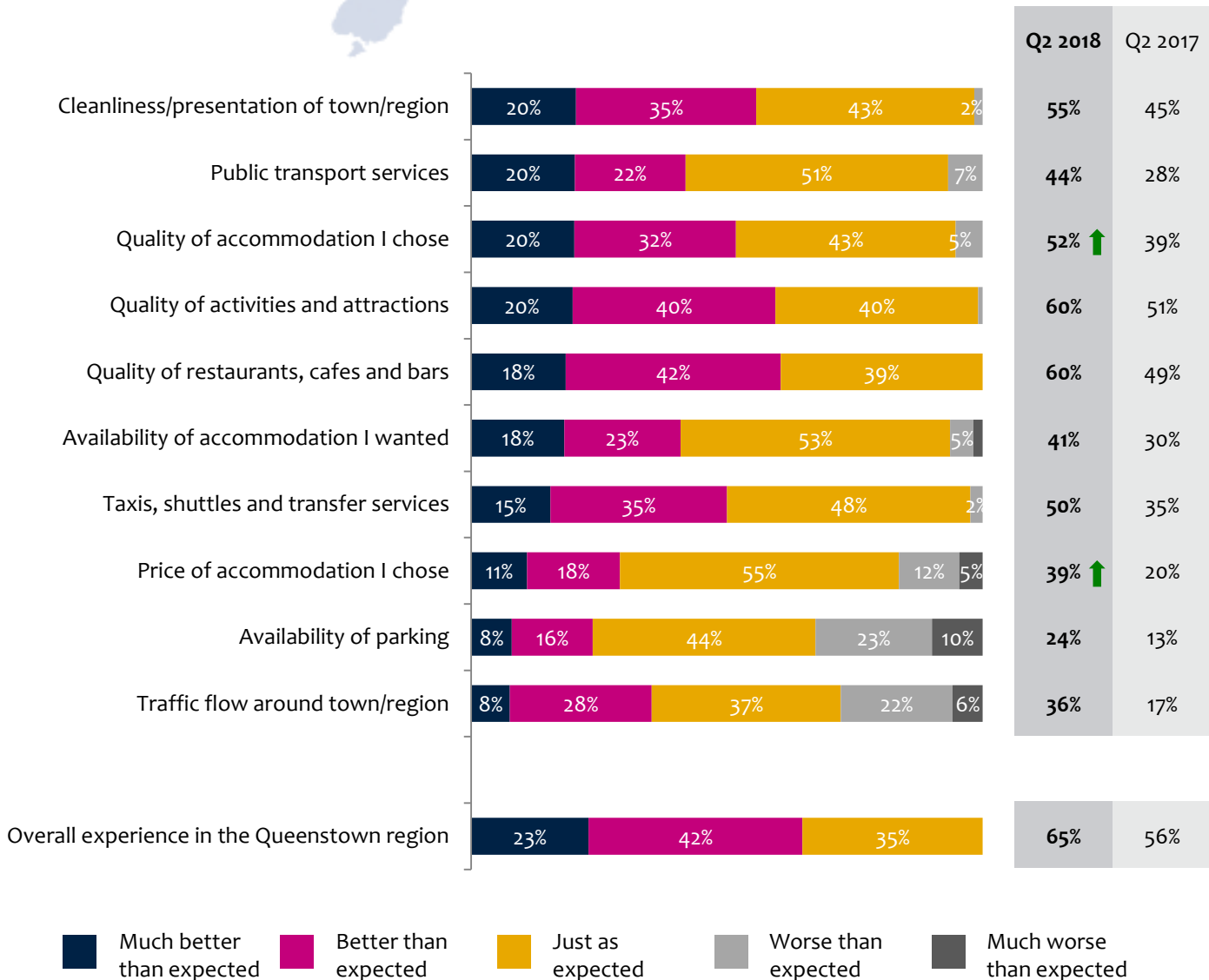
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EXPERIENCE VS. EXPECTATIONS

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)

Aspect	Much better	Better	Just as	Worse	Much worse	Q2 2018	Q2 2017
Quality of restaurants, cafes and bars	41%	24%	34%			**65%**	57%
Quality of activities and attractions	40%	40%	20%			**80%**	68%
Cleanliness/presentation of town/region	40%	27%	33%			**67%**	68%
Price of accommodation I chose	31%	24%	45%			**65%** ⬆	18%
Quality of accommodation I chose	31%	38%	31%			**69%** ⬆	39%
Availability of accommodation I wanted	28%	34%	38%			**64%**	43%
Availability of parking	21%	4%	33%	38%	4%	**25%**	16%
Public transport services	20%	13%	67%			**33%**	28%
Taxis, shuttles and transfer services	19%	19%	62%			**38%**	29%
Traffic flow around town/region	18%	21%	46%	14%		**39%** ⬆	16%
Overall experience in the Queenstown region	47%	23%	30%			**70%**	77%

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
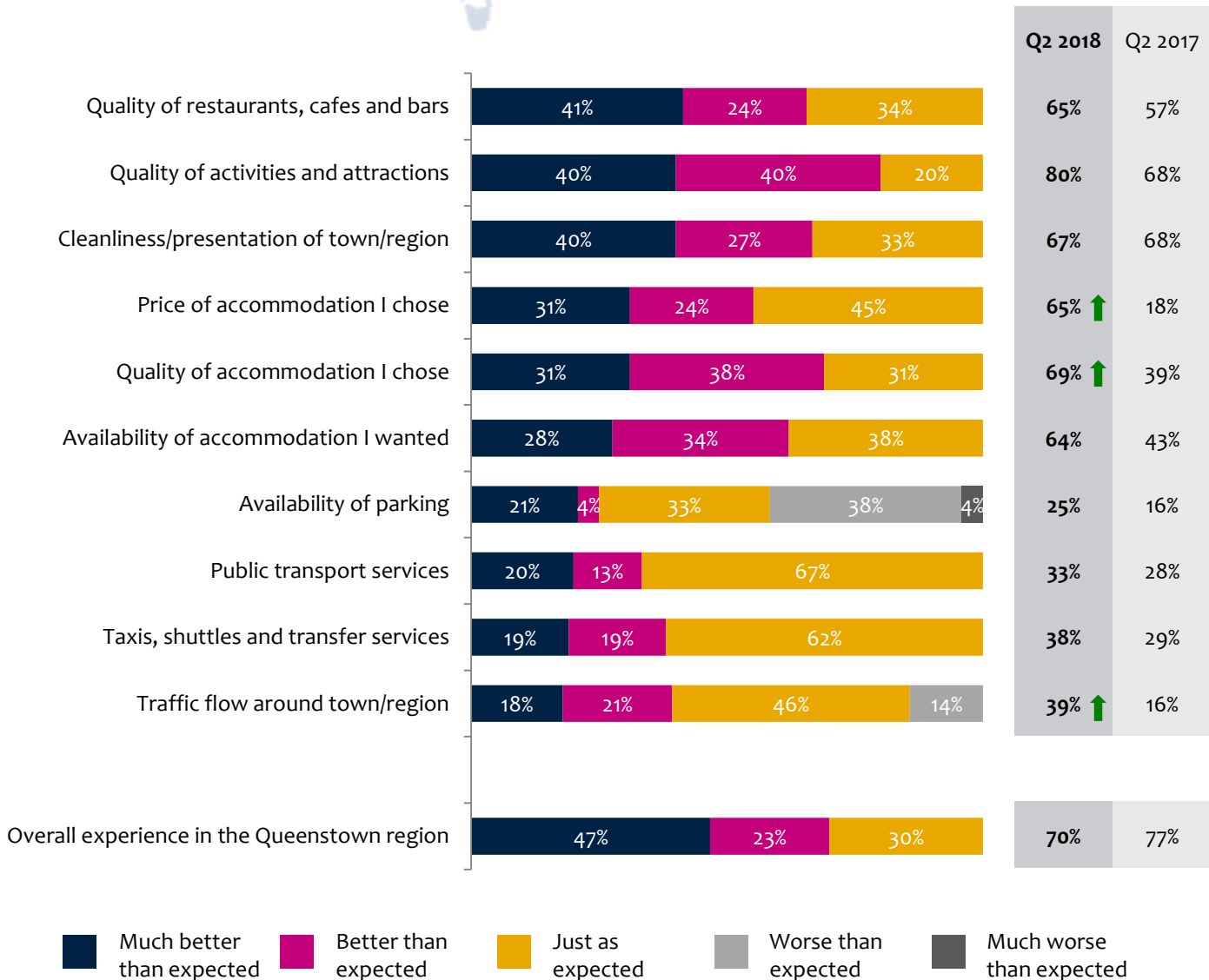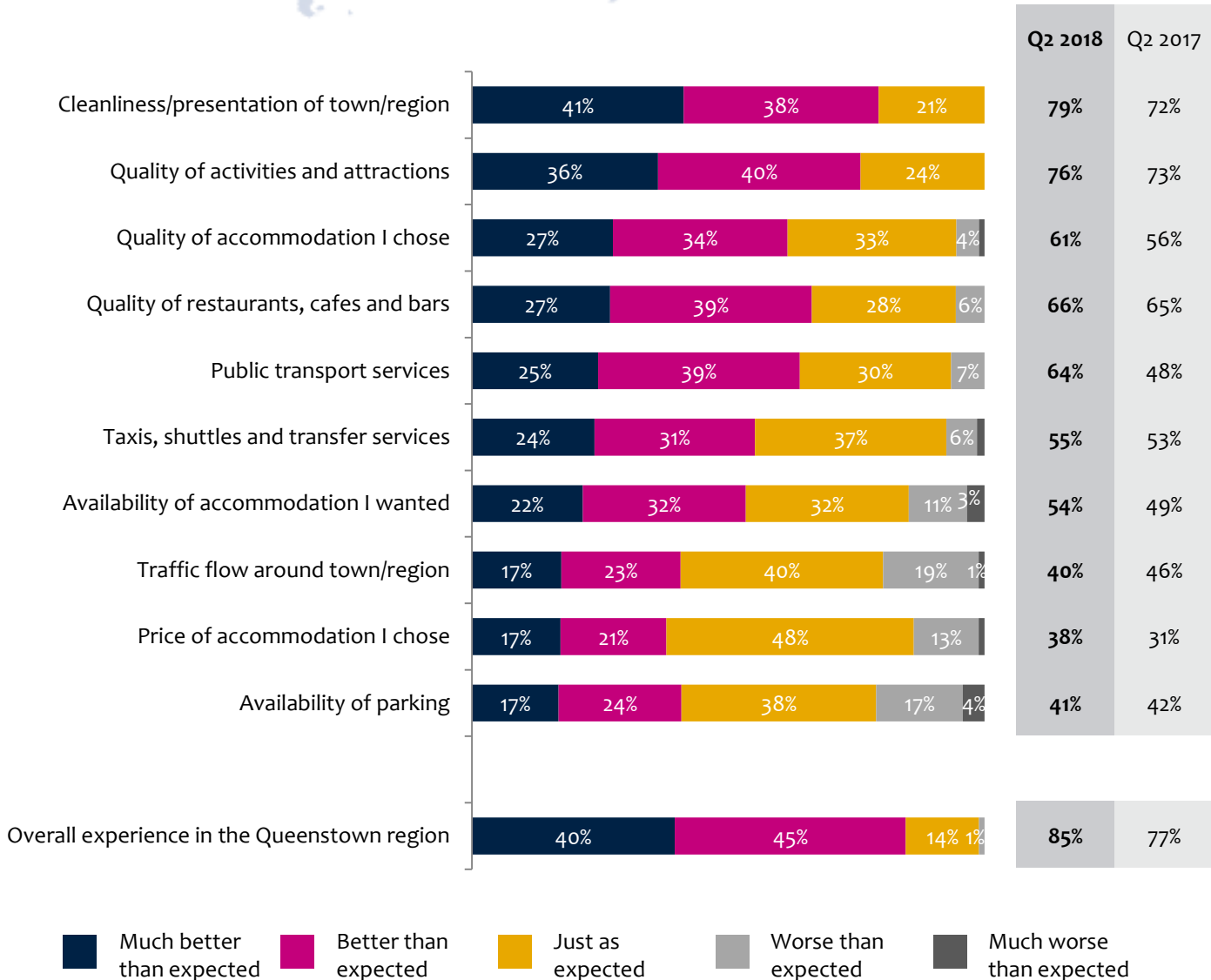
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EXPERIENCE VS. EXPECTATIONS

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?

Other International Visitors
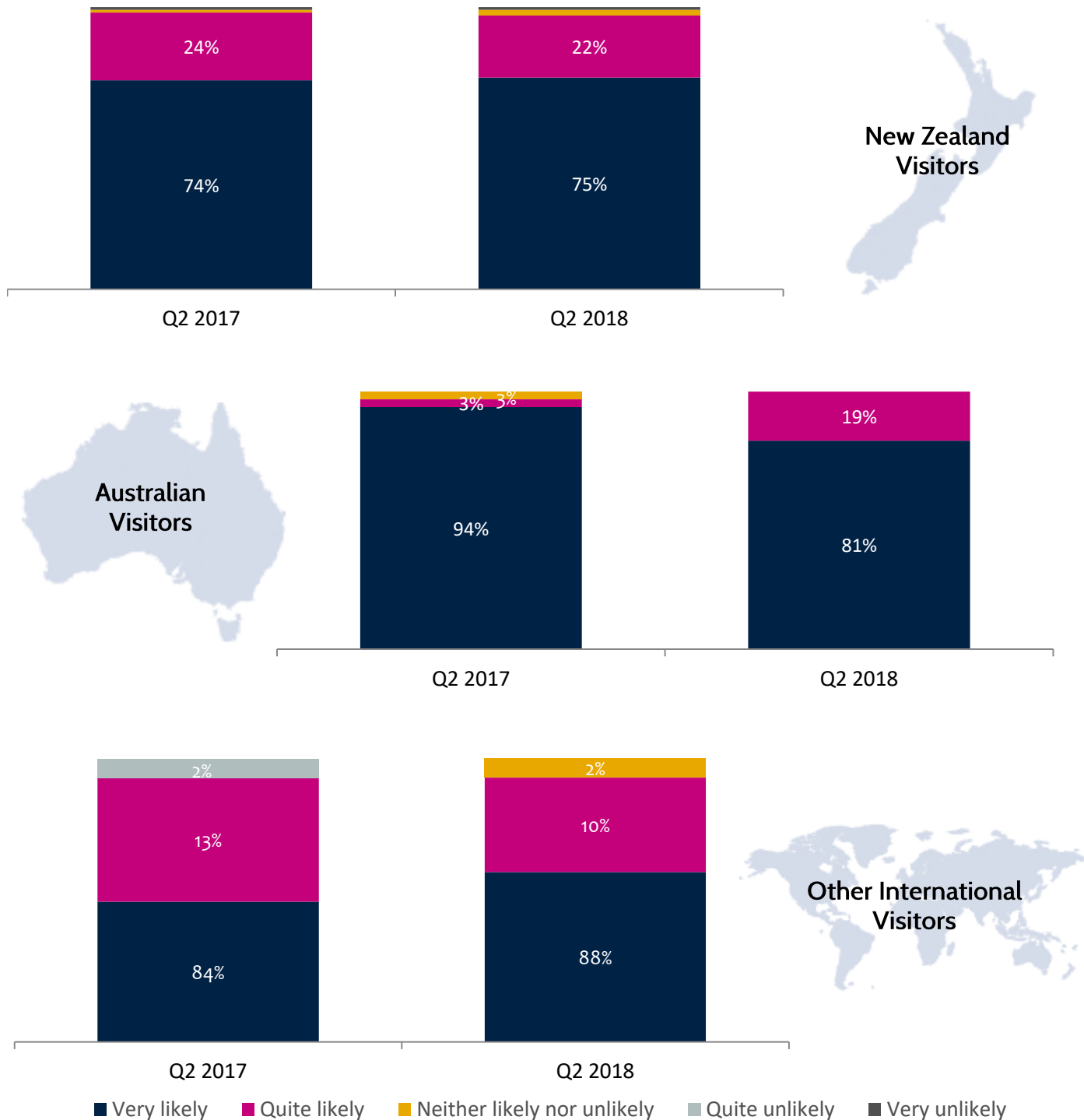
Better than expected
(Top 2 Box)

	Q2 2018	Q2 2017
Cleanliness/presentation of town/region — Much better 41% / Better 38% / Just as 21%	**79%**	72%
Quality of activities and attractions — 36% / 40% / 24%	**76%**	73%
Quality of accommodation I chose — 27% / 34% / 33% / 4%	**61%**	56%
Quality of restaurants, cafes and bars — 27% / 39% / 28% / 6%	**66%**	65%
Public transport services — 25% / 39% / 30% / 7%	**64%**	48%
Taxis, shuttles and transfer services — 24% / 31% / 37% / 6%	**55%**	53%
Availability of accommodation I wanted — 22% / 32% / 32% / 11% / 3%	**54%**	49%
Traffic flow around town/region — 17% / 23% / 40% / 19% / 1%	**40%**	46%
Price of accommodation I chose — 17% / 21% / 48% / 13%	**38%**	31%
Availability of parking — 17% / 24% / 38% / 17% / 4%	**41%**	42%
Overall experience in the Queenstown region — 40% / 45% / 14% / 1%	**85%**	77%

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

Visitor Experience | Queenstown | Q2 2018

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PROPENSITY TO RECOMMEND QUEENSTOWN

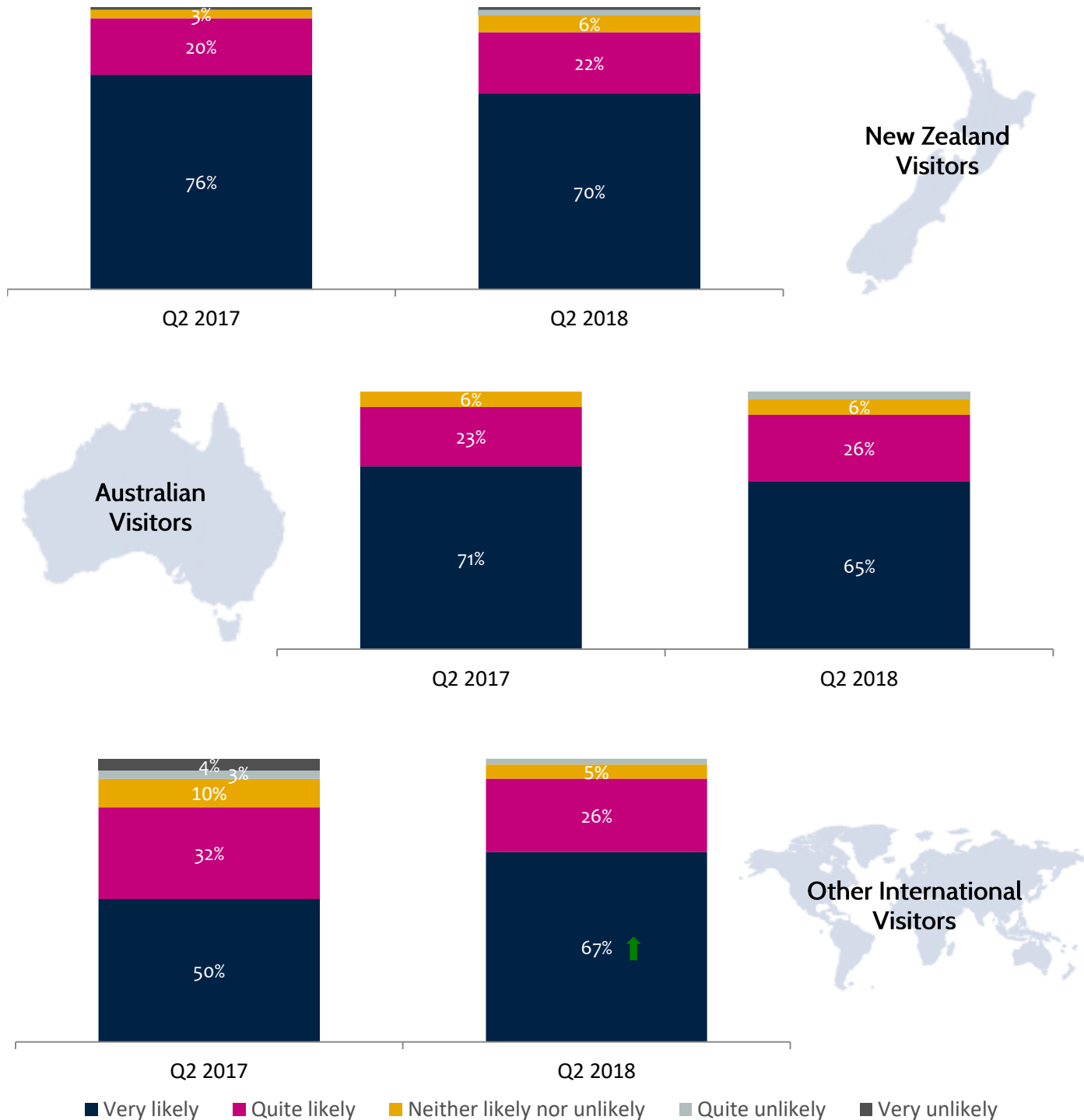How likely is it that you will recommend the Queenstown region as a holiday destination to other people?

New Zealand Visitors

Q2 2017: Very likely 74%, Quite likely 24%
Q2 2018: Very likely 75%, Quite likely 22%

Australian Visitors

Q2 2017: Very likely 94%, Quite likely 3%, Neither likely nor unlikely 3%
Q2 2018: Very likely 81%, Quite likely 19%

Other International Visitors

Q2 2017: Very likely 84%, Quite likely 13%, Quite unlikely 2%
Q2 2018: Very likely 88%, Quite likely 10%, Neither likely nor unlikely 2%

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

No significant changes for any market versus Q2 2017
Base: New Zealand (n=123); Australia (n=31); Other International (n=97)

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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

Q2 2017
- 3%
- 20%
- 76%

Q2 2018
- 6%
- 22%
- 70%

Australian Visitors

Q2 2017
- 6%
- 23%
- 71%

Q2 2018
- 6%
- 26%
- 65%

Other International Visitors

Q2 2017
- 4% 3%
- 10%
- 32%
- 50%

Q2 2018
- 5%
- 26%
- 67% ⬆

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

Base: New Zealand (n=123); Australia (n=31); Other International (n=97)

DEMOGRAPHICS

Gender	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	**Q2 2018**	Q2 2017	**Q2 2018**	Q2 2017
Male	**48%**	50%	**48%**	60%	**52%**	46%
Female	**52%**	50%	**52%**	40%	**47%**	53%

Age	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	**Q2 2018**	Q2 2017	**Q2 2018**	Q2 2017
15-17 years	**5%**	3%	**3%**	0%	**2%**	2%
18-19 years	**5%**	2%	**3%**	6%	**5%**	4%
20-24 years	**15%**	12%	**6%**	6%	**24%**	13%
25-29 years	**13%**	11%	**19%**	17%	**25%**	22%
30-34 years	**10%**	15%	**10%**	11%	**15%**	22%
35-39 years	**7%**	6%	**10%**	11%	**9%**	11%
40-44 years	**8%**	10%	**6%**	11%	**2%**	4%
45-49 years	**9%**	8%	**10%**	6%	**6%**	4%
50-54 years	**7%**	10%	**13%**	3%	**4%**	6%
55-59 years	**7%**	6%	**6%**	9%	**2%**	2%
60-64 years	**4%**	6%	**3%**	11%	**1%**	3%
65-69 years	**5%**	4%	**6%**	3%	**3%**	3%
70-74 years	**3%**	5%	**0%**	3%	**1%**	1%
75+ years	**1%**	3%	**3%**	3%	**0%**	0%
Would rather not say	**1%**	0%	**0%**	0%	**0%**	0%

Previous Visits to Queenstown	New Zealand		Australia		Other International	
	Q2 2018	Q2 2017	**Q2 2018**	Q2 2017	**Q2 2018**	Q2 2017
None (First Visit to Queenstown)	**28%**	18%	**42%**	40%	**71%**	72%
1-5 Previous Visits	**45%**	54%	**48%**	54%	**20%**	22%
6-10 Previous Visits	**11%**	13%	**6%**	3%	**6%**	3%
11-20 Previous Visits	**4%**	5%	**3%**	0%	**1%**	0%
21+ Previous Visits	**11%**	10%	**0%**	3%	**2%**	2%
Base: Total Sample	(123)	(125)	(31)	(35)	(97)	(90)

DEMOGRAPHICS

Region of Residence (New Zealand)

	Q2 2018	Q2 2017
Northland	4%	3%
Auckland	29%	43%
Waikato	5%	8%
Bay of Plenty	6%	2%
Gisborne	0%	1%
Hawkes Bay	2%	2%
Taranaki	2%	2%
Manawatu/Whanganui	4%	2%
Wellington (& Wairarapa)	14%	9%
Marlborough	3%	1%
Nelson	1%	0%
Tasman	0%	0%
West Coast	2%	0%
Canterbury	14%	9%
Otago	12%	10%
Southland	2%	7%
Base: New Zealand	(123)	(125)

Country of Origin (Other International)

	Q2 2018	Q2 2017
United States	19%	17%
United Kingdom	13%	20%
China	4%	6%
Germany	9%	4%
India	7%	4%
Canada	4%	6%
Malaysia	4%	4%
Brazil	6%	3%
Argentina	2%	0%
Japan	1%	2%
Korea, Republic Of	0%	4%
Netherlands	0%	1%
Singapore	1%	3%
Thailand	1%	9%
France	2%	1%
Other	16%	27%
Base: Other International	(97)	(90)

Region of Residence (Australia)

	Q2 2018	Q2 2017
Australian Capital Territory	6%	3%
New South Wales	42%	40%
Northern Territory	0%	0%
Queensland	23%	14%
South Australia	3%	3%
Tasmania	3%	3%
Victoria	16%	26%
Western Australia	6%	11%
Base: Australia	(31)	(35)

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.