



VISITOR INSIGHTS PROGRAMME  
VISITOR EXPERIENCE  
QUEENSTOWN

Q3 2017 (JULY - SEPTEMBER)

### **MOTIVATORS TO VISIT:**

The majority of visitors to Queenstown in Q3 2017 were in the region for a holiday/vacation or short-break, although there was a noticeable increase in the proportion of domestic visitors in the region for business reasons compared to the same period in 2016.

Queenstown's novelty value (to explore and discover uniquely different places and experiences) is a significant drawcard for international markets, while opportunities for relationship enhancement/bonding (spending time with family, friends or partners) remains a key motivator for the domestic market. The need for adventure & excitement appears to be stronger in the Winter ski season months for the domestic and Australian markets, in contrast to other international markets, where it remains a relatively consistent driver throughout the year.

New Zealanders are significantly less likely to consider other regions when planning their trip to Queenstown than international visitors. The activities/attractions available in Queenstown and the natural environment/scenery are the two primary drivers of destination choice across markets for considering Queenstown over other regions. Both New Zealanders and international visitors to Queenstown expect to find beautiful natural landscapes & scenery and adventure/excitement.

### **TRAVEL BEHAVIOUR:**

Queenstown tends to be the primary destination for domestic visitors and the majority of Australian visitors during their overall trip, with an average stay of 4-5 nights. For other international visitors, visiting Queenstown tends to be part of a bigger trip around New Zealand, rather than their primary focus, with visitors spending an average one-third of their overall trip in the region.

The most popular experiences in Queenstown include restaurants, cafes and bars/nightclubs, the Skyline Gondola and lookout, and general sightseeing. For Australian visitors in Q3, the most popular experience in the region was ski/snow/ice activities.

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

Visitors remain very satisfied with their experience in Queenstown, especially the natural setting, the quality of activities and attractions available and the overall cleanliness of the town. There appears to be some improvement in the experience versus expectation of traffic flow and availability of car parking amongst other international visitors, although they continue to be the two of the lowest rated measures for the domestic and Australian markets.

The majority of visitors are likely to recommend Queenstown to others as a holiday destination, a reflection of 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)?

## New Zealand

## Australia

## Other International



**64%** for a holiday/vacation or short-break



**88%** for a holiday/vacation or short-break



**87%** for a holiday/vacation or short-break



**10%** to visit family or friends



**8%** to visit family or friends



**8%** to visit family or friends



**10%** for business reasons

Main Reason for Visit [Single Response]	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Holiday/vacation or short-break	<b>64%</b>	73%	<b>88%</b>	86%	<b>87%</b>	79%
Family or friends	<b>10%</b>	6%	<b>8%</b>	4%	<b>8%</b>	6%
Business reasons	<b>10%</b> ↑	2%	<b>3%</b>	4%	<b>0%</b>	8%
Conference or convention	<b>7%</b>	7%	<b>0%</b>	0%	<b>1%</b>	0%
Transport connection/just passing through	<b>5%</b>	4%	<b>0%</b>	0%	<b>0%</b>	0%
Event held by friends or family	<b>2%</b>	2%	<b>3%</b>	4%	<b>0%</b>	0%
Education/study	<b>1%</b>	1%	<b>0%</b>	0%	<b>2%</b>	2%
Event held by someone else	<b>0%</b>	2%	<b>0%</b>	0%	<b>0%</b>	0%
Other	<b>2%</b>	2%	<b>0%</b>	1%	<b>1%</b>	6%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

# 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

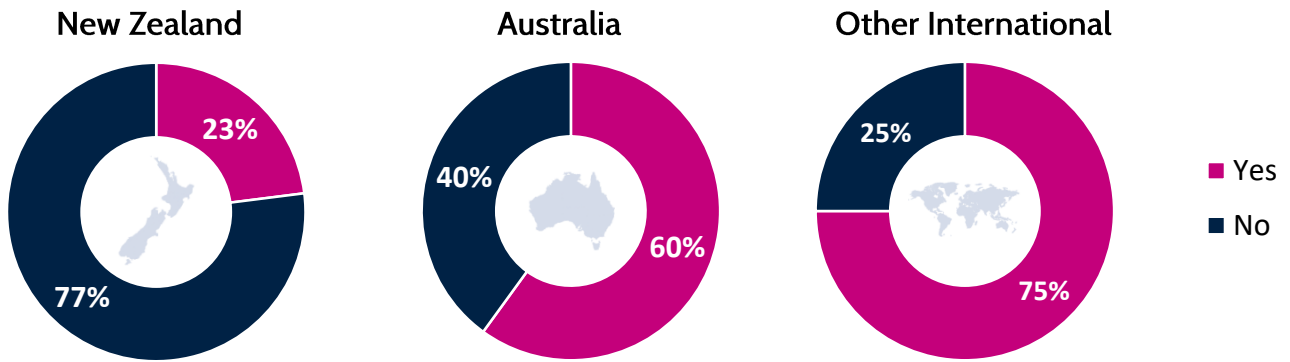
## Other International



Travel Motivations [Multiple Response]	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Spend time with my family, friends, or partner	46%	38%	29%	28%	16%	17%
Experience adventure and excitement	44%	37%	57%	55%	36%	37%
Relax, recharge and feel refreshed	36%	36%	29%	20%	22%	20%
Escape from the routine and pressures of everyday life	31%	25%	17%	28%	22%	12%
Explore/discover uniquely different places and experiences	30%	21%	46%	30%	47%	46%
Visit a must-see destination that people talk about	15%	20%	26%	25%	32%	32%
Meet new people and share experiences	6%	2%	17%	13%	16%	10%
Indulge in comfort and be pampered	5%	2%	6%	6%	1%	2%
None of the above	1%	1%	3%	3%	0%	5%
Base: Visitors on Holiday/Vacation or Short Break	(81)	(91)	(35)	(64)	(73)	(41)

# DRIVERS OF DESTINATION CHOICE

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



No significant changes for any market versus Q3 2016

Base: New Zealand (n=126), Australia (n=40) & Other International (n=84)

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	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Activities/experiences available in Queenstown	54%	54%	62%	59%	42%	35%
Queenstown's natural environment/scenery	50%	36%	49%	30%	37% ↓	56%
Recommendations by family or friends	12%	14%	21%	14%	27%	23%
Convenient travel options to get to/from Queenstown	11%	8%	15%	12%	9%	8%
Queenstown's reputation as a safe and secure destination	14% ↑	4%	8%	9%	12%	13%
Stories or promotions I saw/heard about Queenstown	4%	7%	8%	1%	10%	4%
Queenstown's restaurants, cafés, nightlife or shopping	16%	14%	13%	14%	12%	8%
Queenstown's people/culture	8%	8%	10%	7%	8%	8%
Queenstown's wine/wineries	9%	9%	3%	1%	1%	4%
Queenstown's weather, climate or seasons	27% ↑	15%	23%	33%	12%	21%
Accommodation options available in Queenstown	11%	5%	3%	13%	5%	4%
Family or friends I wanted to visit in Queenstown	20%	14%	15%	7%	4%	6%
Special deal on transport/activities/accommodation	7%	5%	0%	4%	3%	4%
Recommendations by a travel advisor (e.g. a travel agent)	2%	0%	8%	3%	15% ↑	4%
An event, concert or festival held in Queenstown	0%	5%	3%	1%	3%	0%
Other	3%	2%	8%	6%	3%	6%
Base: Visitors on Holiday/Vacation or Short Break or Considered Visiting Alternative Region	(90)	(99)	(39)	(69)	(78)	(48)

# EXPECTATIONS OF QUEENSTOWN


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

## New Zealand


## Australia

## Other International


 **75%** beautiful natural landscapes and scenery


 **73%** adventure and excitement


 **71%** beautiful natural landscapes and scenery

 **60%** adventure and excitement

 **68%** beautiful natural landscapes and scenery

 **58%** adventure and excitement

 **47%** good food and wine

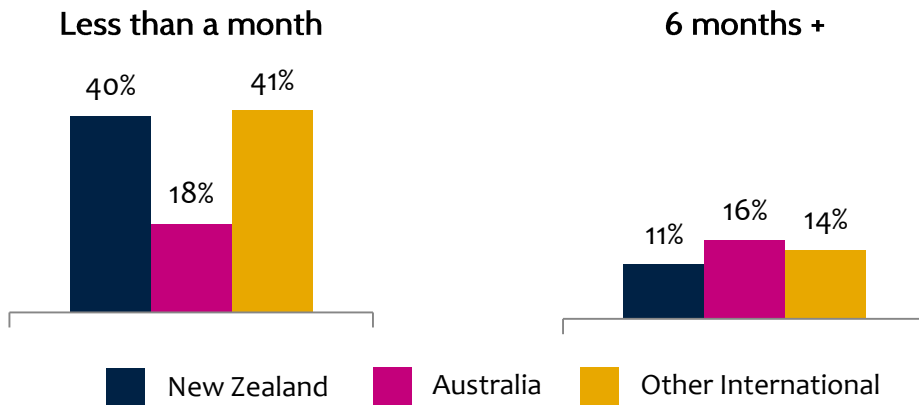
 **48%** a clean and unpolluted environment

 **46%** a relaxing place to visit

Expectations of Queenstown [Multiple Response]	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Beautiful natural landscapes and scenery	75%	78%	68%	80%	71%	67%
Adventure and excitement	60%	67%	73%	62%	58%	48%
Good food and wine	47%	54%	35%	50%	19%	15%
An appealing cityscape/townscape	44%	42%	40%	41%	33%	27%
A clean and unpolluted environment	42%	46%	48%	42%	37%	37%
A relaxing place to visit	40%	52%	43%	35%	46%	38%
A safe and secure place to visit	39%	34%	35%	41%	33%	37%
Friendly local people	35%	33%	45%	49%	38%	33%
Good weather	29%	34%	10%	20%	18%	29%
A vibrant urban environment	28%	27%	25%	22%	14%	10%
Unique history or heritage sites	23%	21%	10%	16%	12%	6%
Unique wildlife	10%	6%	18%	9%	11%	12%
Unique bush or plants	10%	10%	15%	8%	5%	10%
An authentic culture	7%	6%	8%	18%	11%	6%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

# 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?



No significant changes for any market versus Q3 2016

Booking to Arrival Lag [Single Response]	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
I didn't book anything before I arrived	1%	0%	0%	1%	1%	2%
Less than a week	19%	13%	15%	11%	20%	23%
One week to a month	21%	17%	3%	7%	21%	17%
1 month	20%	14%	8%	5%	13%	12%
2 months	10% ↓	22%	25%	12%	13%	17%
3 months	9%	14%	5%	19%	10%	15%
4 months	8%	5%	23% ↑	7%	5%	0%
5 months	2%	5%	8%	9%	1%	2%
6 months	8%	3%	3% ↓	20%	7%	6%
7 months	0%	2%	3%	0%	1%	0%
8 months	0%	1%	5%	1%	2%	2%
9 months	0%	1%	0%	0%	1%	0%
10 months	0%	0%	0%	0%	1%	2%
11 months	2%	0%	0%	1%	0%	0%
12 months	0%	3%	0%	1%	1%	2%
Between one and two years	0%	1%	5%	3%	1%	0%
Between two and five years	1%	1%	0%	0%	0%	0%
More than five years	0%	0%	0%	1%	0%	0%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

# TRAVEL COMPANIONS

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



## Solo

New Zealand: 19%  
Australia: 10%  
Other International: 20%



## Couple (2 People)

New Zealand: 27%  
Australia: 30%  
Other International: 24%



## Group (3+ people)

New Zealand: 37%  
Australia: 48%  
Other International: 36%

Travel Companions [Multiple Response]	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
No-one, I am travelling on my own	19%	14%	10%	8%	20%	29%
My partner/spouse	44%	55%	60%	51%	35%	37%
My child or children	16%	10%	20%	11%	10%	13%
Other members of my family	16%	17%	20%	12%	15%	12%
A friend or friends	16%	24%	18%	22%	21%	21%
Work/business colleagues	7%	2%	0%	5%	1%	8%
Other members of a tour group	0%	0%	5%	1%	5%	4%
Other members of an organised group	2%	0%	0%	1%	2%	2%
Other people	0%	1%	0%	1%	0%	0%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

## Average Size of Travel Group

### New Zealand

2.9 Adults  
0.2 Children

### Australia

4.4 Adults  
0.3 Children

### Other International

4.3 Adults  
0.6 Children

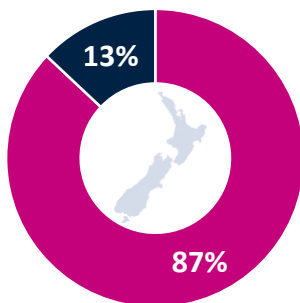


# LENGTH OF CURRENT TRIP

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?

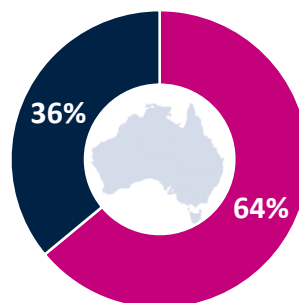


**New Zealand Visitors:**  
Spent **87%** of their trip in Queenstown,  
staying an average of **4 nights**

Q3 2016: 4 Nights

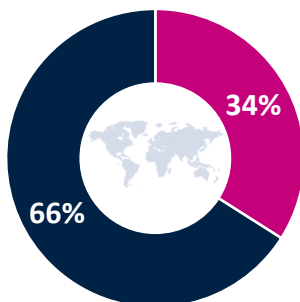
**Australian Visitors:**  
Spent **64%** of their trip in Queenstown,  
staying an average of **5 nights**

Q3 2016: 7 Nights



**Other International Visitors:**  
Spent **34%** of their trip in Queenstown,  
staying an average of **3 nights**

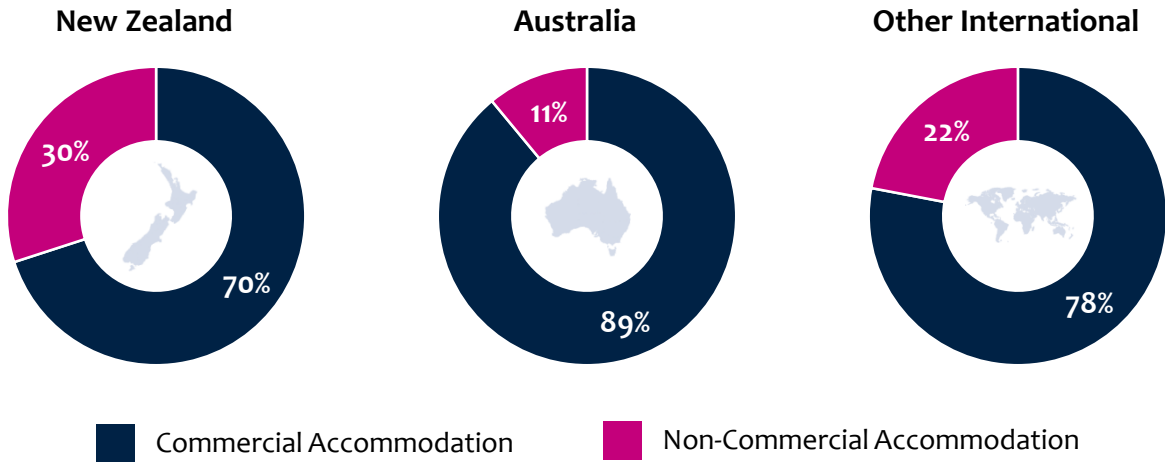
Q3 2016: 5 Nights



Base: New Zealand (n=126); Australia (n=40); Other International (n=84)

# 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	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
<b>Commercial Accommodation</b>	<b>70%</b>	<b>73%</b>	<b>89%</b>	<b>77%</b>	<b>78%</b>	<b>66%</b>
Hotel	42%	36%	43%	35%	29%	19%
Motel	8%	14%	8%	8%	12%	10%
Serviced apartment	11%	13%	13%	14%	6%	4%
Backpackers/hostel	3%	5%	10%	12%	18%	31%
Exclusive/luxury lodge	5%	3%	5%	1%	0%	0%
Camping ground/holiday park	1%	2%	10%	7%	13% ↑	2%
<b>Non-Commercial Accommodation</b>	<b>30%</b>	<b>27%</b>	<b>11%</b>	<b>23%</b>	<b>22%</b>	<b>34%</b>
Private home/holiday home - no payment made	12%	12%	0%	3%	2%	2%
Private home/holiday home - rented	10%	9%	3%	9%	5%	17%
Bed/room in a private home - rented (e.g. Airbnb)	4%	2%	5%	5%	12%	10%
Bed and Breakfast	2%	1%	3%	1%	2%	4%
Homestay or Farmstay	0%	0%	0%	1%	0%	0%
National Park DoC hut or tent site	0%	0%	0%	0%	0%	0%
Freedom camping (tent, campervan etc.)	0%	0%	3%	0%	1%	2%
Other	2%	3%	0%	3%	0%	0%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

# EXPERIENCES IN REGION

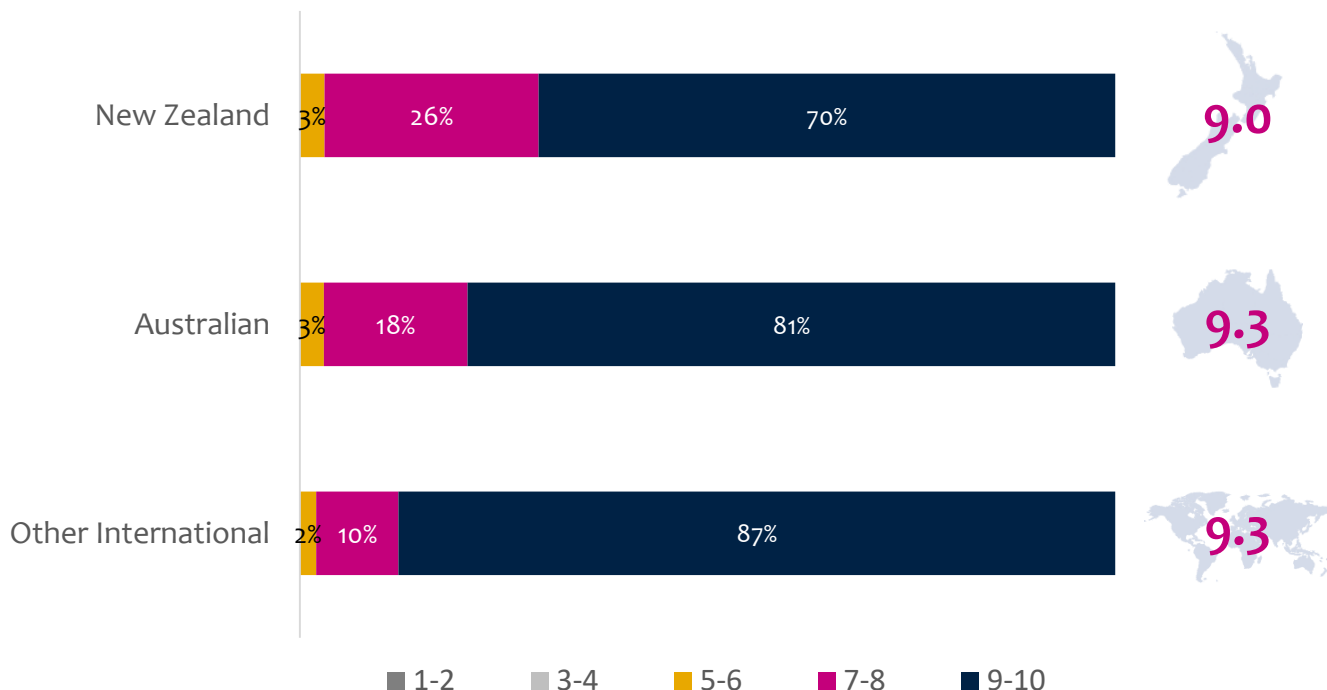
During your current stay in the Queenstown region, which of these have you done or do you intend to do?

Experiences in Region [Multiple Response]	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Restaurants and cafés, bars/nightclubs	60%	57%	58%	68%	61%	60%
Skyline Gondola and lookout	50%	40%	65%	57%	51%	54%
Sightseeing (on foot, by road, cable car, or rail – independently or on a tour – including popular attractions)	37%	31%	53%	46%	49%	50%
Walking, hiking, climbing, trekking, tramping	21%	25%	28%	23%	42%	42%
A visit to Arrowtown	40%	44%	38%	35%	31%	25%
A visit to Fiordland/Milford Sound	12%	13%	48% ↑	20%	40%	40%
Shopping	34%	42%	40%	36%	37%	48%
River and lake adventures (e.g. jetboating, rafting)	16%	13%	30%	31%	31%	23%
Lake cruising or boating (including fishing, water skiing)	13%	15%	20%	16%	15%	12%
A visit to Glenorchy	11%	13%	18%	23%	10%	17%
Extreme activities (bungy, canyon swings, skydiving)	15%	12%	33%	32%	38%	33%
Wineries or other wine experiences	7% ↓	20%	13%	20%	7%	12%
Viewing, learning about or interacting with birds or animals	2%	1%	13%	7%	8%	12%
Art galleries, museums, historic buildings or sites or other cultural or heritage attractions	9%	15%	8%	7%	17%	10%
Wellness experiences	12%	12%	18%	15%	13%	8%
Flying/air activities	5%	4%	13%	16%	12%	10%
Lord of the Rings, Hobbit or other film-related sightseeing tours and activities	1%	3%	13%	9%	15%	15%
Ski, snow, ice activities	34%	41%	68%	78%	26%	40%
Cycling/biking	1%	6%	5%	8%	11%	10%
Other soft adventure or sports activities (e.g. horse riding)	2%	5%	5%	1%	10% ↑	2%
Event, concert or festivals	5%	3%	3%	1%	1%	2%
Golf	2%	4%	3%	3%	0%	0%
None of the above	7%	4%	0%	0%	0%	4%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

# 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		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Accommodation	8.6	8.5	8.5	8.8	8.5	8.0
Transport to Queenstown	8.4	8.5	8.3	8.6	8.9	8.3
Local transport options and services	7.7	7.9	8.1	8.1	8.2	7.4
Traffic and car parking	6.1	6.6	6.6	6.2	7.8	7.3
Public facilities (parks, toilets)	8.5	8.5	9.0	8.8	9.1	8.7
Natural environment	9.5	9.3	9.7	9.7	9.7	9.6
Cleanliness/presentation of town/region	9.0	8.9	9.4	9.4	9.3	9.1
Activities and attractions	9.2	9.1	9.3	9.4	9.3	9.0
Restaurants, cafes and bars in Queenstown	8.7	8.6	9.0	9.0	8.8	8.5
Overall experience in the Queenstown region	9.0	9.1	9.3	9.4	9.3	9.0
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)

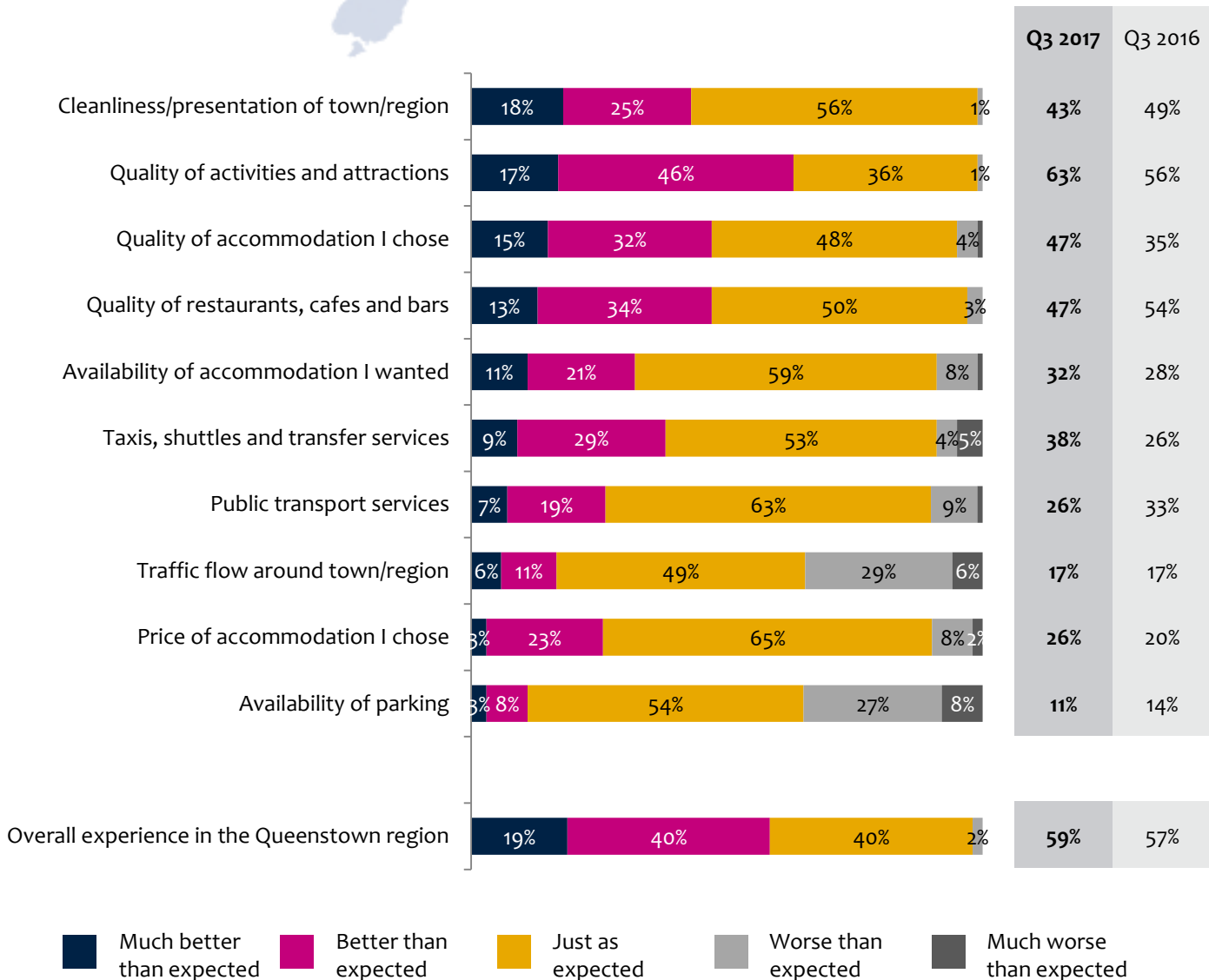
# EXPERIENCE VS. EXPECTATIONS

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)



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

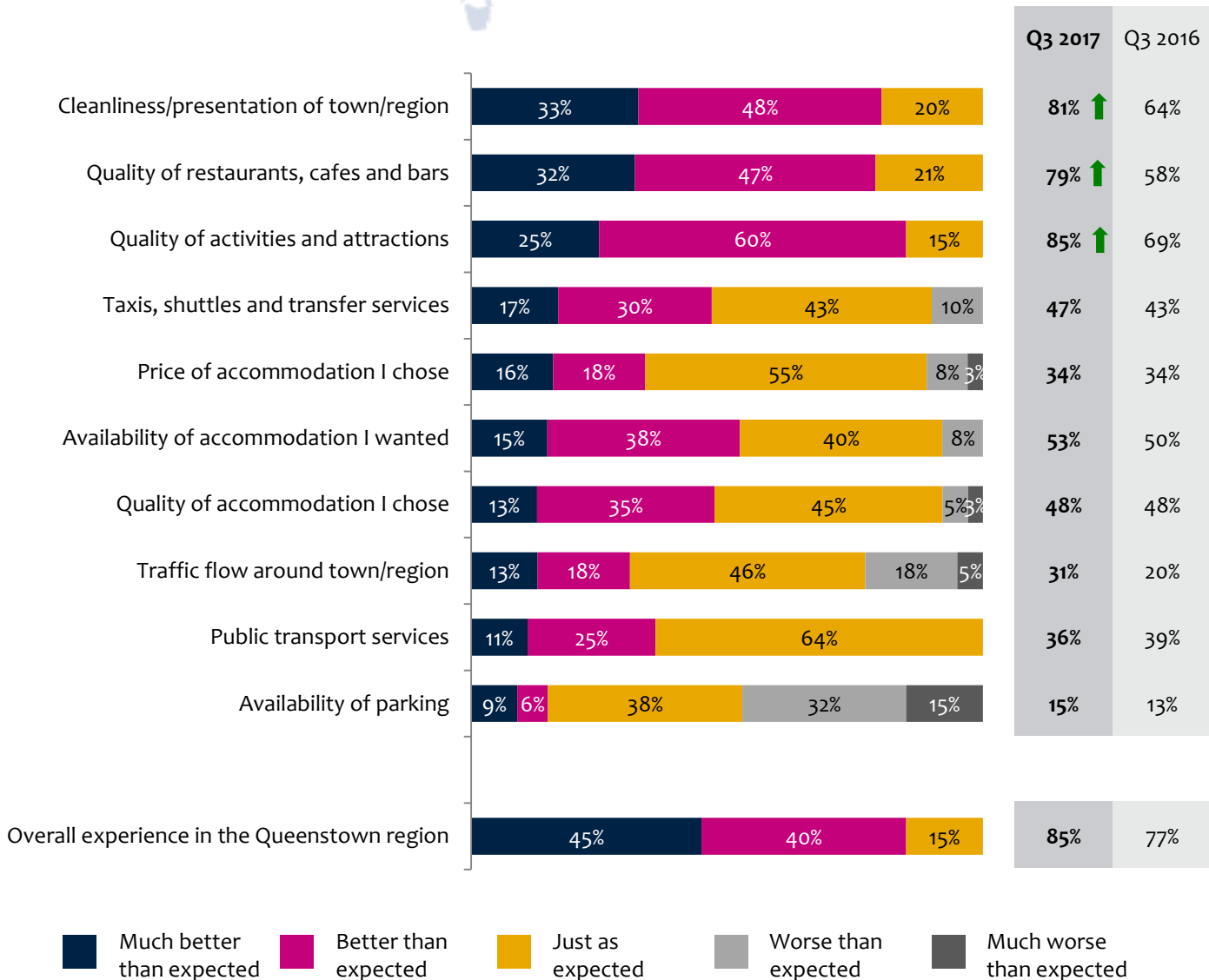
# EXPERIENCE VS. EXPECTATIONS

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)



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

# 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

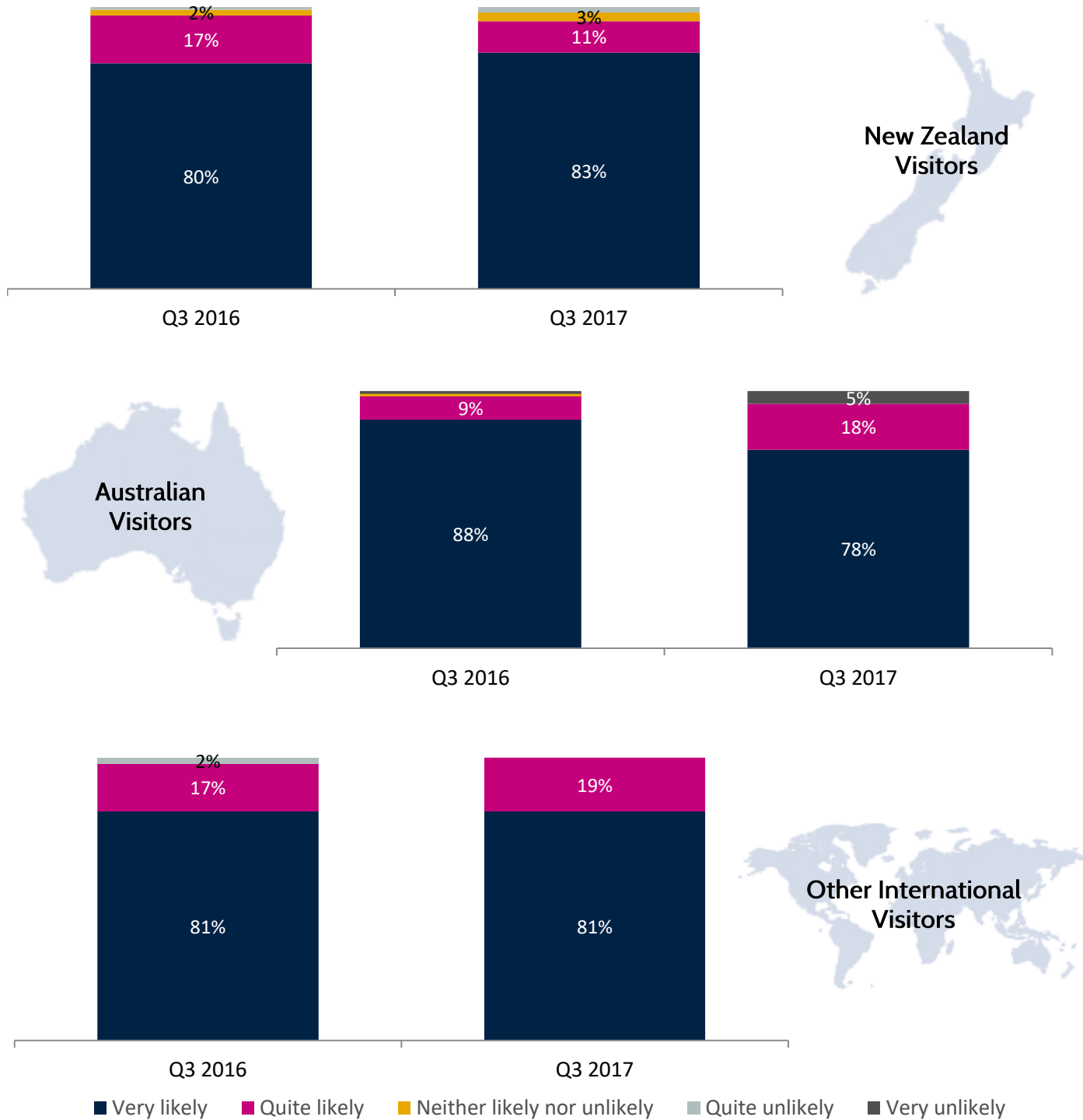
Better than expected  
(Top 2 Box)



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

# PROPENSITY TO RECOMMEND QUEENSTOWN

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

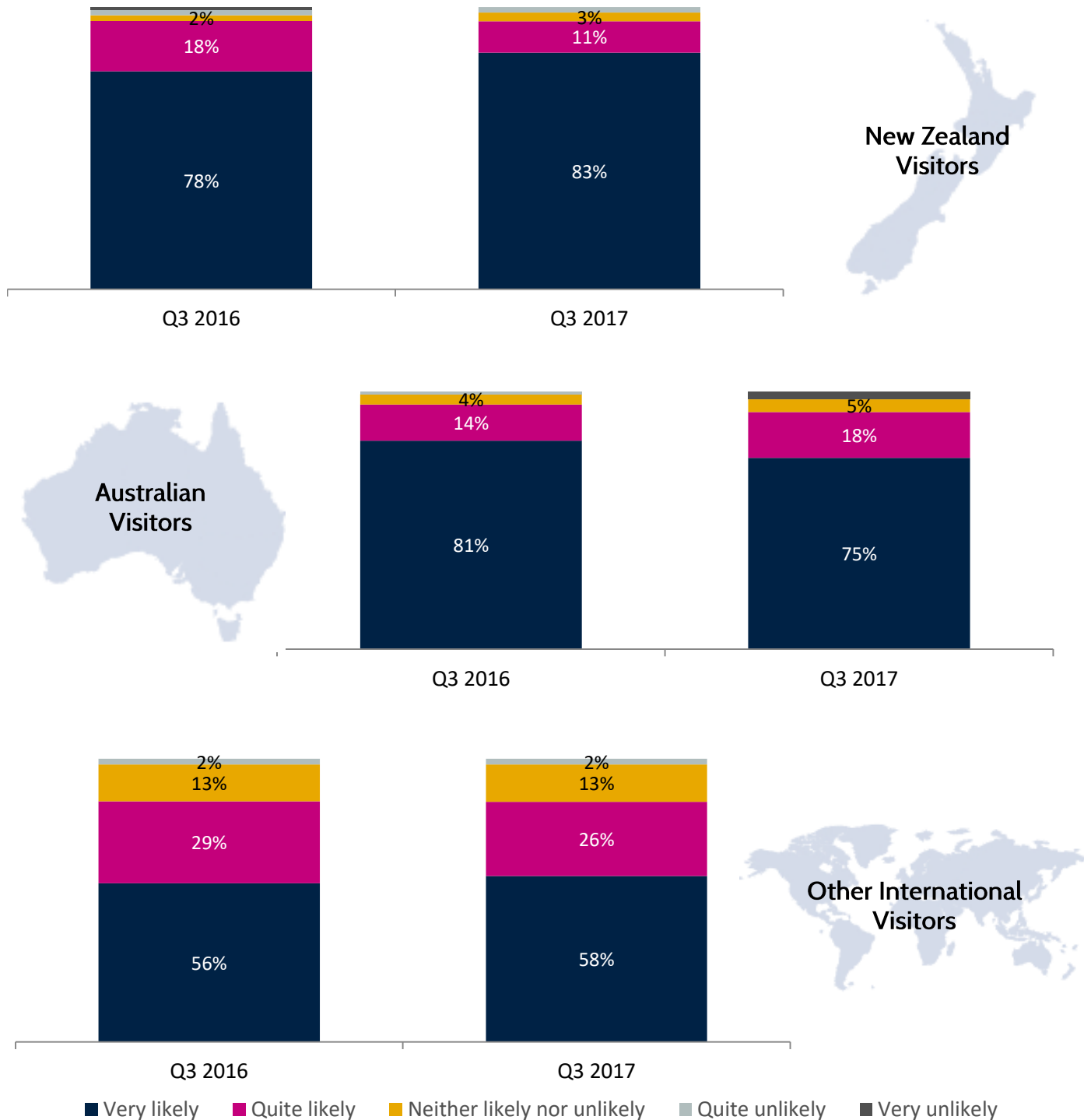


Base: New Zealand (n=126); Australia (n=40); Other International (n=84)



# 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=126); Australia (n=40); Other International (n=84)

# DEMOGRAPHICS

## Sample Profile

Gender	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
Male	50%	50%	45%	43%	51%	60%
Female	50%	50%	55%	57%	49%	40%
Age	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
15-17 years	1%	2%	0%	0%	2%	0%
18-19 years	8%	6%	0%	3%	2%	4%
20-24 years	17%	10%	33%	23%	17%	19%
25-29 years	15%	10%	18%	18%	23%	27%
30-34 years	9%	14%	10%	11%	18%	13%
35-39 years	4%	10%	18%	11%	10%	13%
40-44 years	16%	4%	0%	5%	11%	2%
45-49 years	7%	14%	0%	3%	6%	4%
50-54 years	10%	11%	5%	14%	8%	8%
55-59 years	11%	7%	3%	4%	1%	8%
60-64 years	1%	5%	13%	4%	1%	2%
65-69 years	0%	3%	3%	3%	0%	0%
70-74 years	1%	1%	0%	1%	0%	0%
75+ years	1%	3%	0%	1%	0%	0%
Would rather not say	0%	0%	0%	0%	1%	0%
Previous Visits to Queenstown	New Zealand		Australia		Other International	
	Q3 2017	Q3 2016	Q3 2017	Q3 2016	Q3 2017	Q3 2016
None (First Visit to Queenstown)	23%	25%	58%	47%	76%	73%
1-5 Previous Visits	47%	46%	43%	47%	20%	27%
6-10 Previous Visits	13%	16%	0%	1%	2%	0%
11-20 Previous Visits	11%	6%	0%	1%	1%	0%
21+ Previous Visits	6%	6%	0%	3%	0%	0%
Base: Total Sample	(126)	(125)	(40)	(74)	(84)	(52)



# DEMOGRAPHICS

## Sample Profile

### Region of Residence (New Zealand)

	Q3 2017	Q3 2016
Northland	1%	6%
Auckland	56%	49%
Waikato	6%	7%
Bay of Plenty	4%	6%
Gisborne	1%	0%
Hawkes Bay	0%	2%
Taranaki	0%	1%
Manawatu/Whanganui	1%	2%
Wellington (& Wairarapa)	13%	9%
Marlborough	1%	2%
Nelson	0%	2%
Tasman	1%	0%
West Coast	1%	0%
Canterbury	9%	6%
Otago	2%	5%
Southland	5%	4%
Base: New Zealand	(126)	(125)

### Region of Residence (Australia)

	Q3 2017	Q3 2016
Australian Capital Territory	3%	0%
New South Wales	43%	32%
Northern Territory	5%	0%
Queensland	30%	36%
South Australia	3%	3%
Tasmania	0%	1%
Victoria	13%	16%
Western Australia	5%	11%
Base: Australia	(40)	(74)

### Country of Origin (Other International)

	Q3 2017	Q3 2016
Argentina	1%	4%
Belgium	0%	2%
Brazil	2%	0%
Canada	7%	6%
Chile	0%	2%
China	10%	0%
Czech Republic	1%	2%
Fiji	0%	2%
Germany	0%	6%
Hong Kong	5%	0%
India	7%	6%
Ireland	0%	4%
Japan	2%	4%
Korea	2%	2%
Malaysia	6%	10%
Mexico	0%	2%
Netherlands	1%	0%
New Caledonia	0%	6%
Philippines	2%	0%
Singapore	1%	4%
South Africa	0%	2%
Spain	1%	0%
Taiwan	2%	4%
Thailand	1%	2%
United Arab Emirates	2%	4%
United Kingdom	15%	17%
United States	18%	12%
Base: Other International	(84)	(52)



## 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.