



VISITOR INSIGHTS PROGRAMME  
VISITOR EXPERIENCE  
QUEENSTOWN

Q4 2016 (OCTOBER – DECEMBER)

### **MOTIVATORS TO VISIT:**

The majority of visitors to Queenstown visit the region for a holiday/vacation or short-break. Opportunities 'to explore and discover uniquely different places and experiences' and 'to visit a must-see destination that people talk about' make Queenstown an attractive holiday destination for all markets, especially for Australians and Other Internationals. The domestic market on the other hand identified the opportunity 'to spend time with family, friends or a partner' and 'to relax, recharge, and feel refreshed' most regularly – a clear difference in travel motivations when comparing the domestic to international markets.

When planning current trips to Queenstown, 32% of domestic, 67% of Australian and 82% of Other International visitors considered visiting another New Zealand region instead of Queenstown – a significant increase from the previous quarter, likely due to the fact that many visitors over the winter would have been in Queenstown specifically to ski/snowboard so would have been less likely to look at alternative regions.

Returning visitors have higher expectations of finding good food and wine in the region and of the region being a relaxing place to visit, suggesting an opportunity to further promote Queenstown's culinary and wine offerings or as a destination to relax and unwind. First time visitors have significantly higher expectations of finding adventure and excitement, a possible indicator of the brand messages reaching potential visitors.

### **TRAVEL BEHAVIOUR:**

Notable this quarter are the changes in booking behaviour amongst Other International visitors. Q3 2016 results showed that 42% of Other International visitors made their first booking for their trip to Queenstown less than a month in advance, this figure drops to 24% for Q4 2016. On the other end of the spectrum, 26% of Other International visitors in Q4 made their first booking more than 6 months prior to visiting Queenstown, more than double from the previous quarter. This change in booking behaviour is the likely result of Other International visitors planning their trips further in advance anticipating a busy end of year period in the region.

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

The quality of accommodation chosen, quality of activities/attractions and cleanliness/presentation of the town, exceed visitor expectations. Visitors are disappointed however with the availability of parking and the traffic flow around Queenstown - although Other International visitors appear to have had lower expectations of traffic flow and were therefore less disappointed. There are opportunities to boost visitor satisfaction with improvements to both traffic and car parking and also local transport options and services.

Visitor experiences have largely been in line with or have exceeded expectations across the various aspects measured. Encouragingly, the 'overall experience' across all markets outperformed all other measures, with 55% of domestic, 84% of Australian and 78% of Other International visitors indicating that their overall experience of the region exceeded their expectations – indication that the various aspects of the region are combining to deliver an experience that exceeds expectations. The majority of visitors are also 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	71%	88%	92%
Family or friends	9%	2%	4%
Event held by friends or family	6%	5%	0%
Business reasons	4%	0%	1%
Conference or convention	2%	2%	0%
Transport connection/just passing through	2%	0%	2%
Education/study	0%	2%	0%
Event held by someone else	2%	0%	0%
Other	4%	0%	1%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</i>

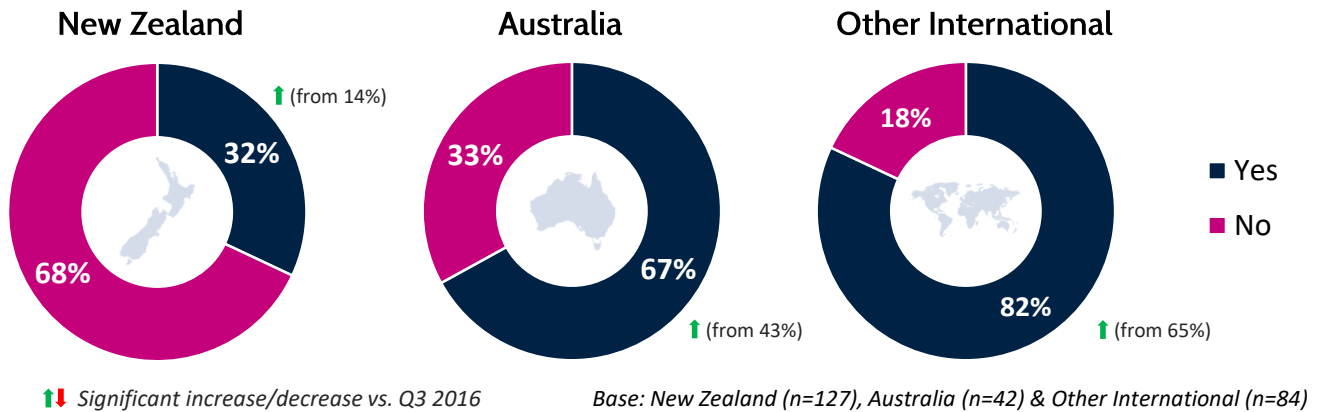
## TRAVEL MOTIVATIONS

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	23%	46%	66%
Visit a must-see destination that people talk about	21%	43%	36%
Experience adventure and excitement	24%	43%	25%
Relax, recharge and feel refreshed	38%	30%	17%
Spend time with my family, friends, or partner	39%	14%	18%
Escape from the routine and pressures of everyday life	18%	14%	9%
Meet new people and share experiences	2%	5%	10%
Indulge in comfort and be pampered	3%	3%	4%
None of the above	2%	3%	1%
<i>Base: Visitors on Holiday/Vacation or Short Break</i>	<i>(n=90)</i>	<i>(n=37)</i>	<i>(n=77)</i>

# DRIVERS OF DESTINATION CHOICE

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



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

Drivers of Destination Choice [Multiple Response]	New Zealand	Australia	Other International
Queenstown's natural environment/scenery	55%	36%	55%
Activities/experiences available in Queenstown	47%	52%	39%
Recommendations by family or friends	21%	30%	31%
Convenient travel options to get to/from Queenstown	19%	12%	13%
Queenstown's restaurants, cafés, nightlife or shopping	15%	12%	9%
Queenstown's reputation as a safe and secure destination	11%	12%	9%
Queenstown's weather, climate or seasons	14%	9%	5%
Stories or promotions I saw/heard about Queenstown	5%	12%	8%
A special deal offered on transport/activities/accommodation	8%	12%	4%
Queenstown's people/culture	11%	6%	5%
Recommendations by a travel advisor (e.g. a travel agent)	1%	9%	9%
Accommodation options available in Queenstown	8%	9%	1%
Family or friends I wanted to visit in Queenstown	7%	3%	4%
An event, concert or festival held in Queenstown	6%	3%	1%
Queenstown's wine/wineries	6%	3%	1%
Other	4%	0%	5%
None of the above	1%	0%	0%
<i>Base: Visitors on Holiday/Vacation or Short Break or Considered Visiting Alternative Region</i>	<i>(n=99)</i>	<i>(n=33)</i>	<i>(n=75)</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	76%	76%	71%
Adventure and excitement	56%	57%	55%
A clean and unpolluted environment	54%	50%	40%
A relaxing place to visit	57%	40%	40%
A safe and secure place to visit	45%	40%	36%
An appealing cityscape/townscape	47%	40%	27%
Good food and wine	46%	38%	19%
Friendly local people	36%	24%	37%
A vibrant urban environment	23%	21%	14%
Good weather	24%	12%	20%
Unique bush or plants	20%	12%	12%
Unique history or heritage sites	23%	10%	5%
Unique wildlife	9%	7%	14%
An authentic culture	9%	10%	6%
None of the above	0%	0%	1%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</i>



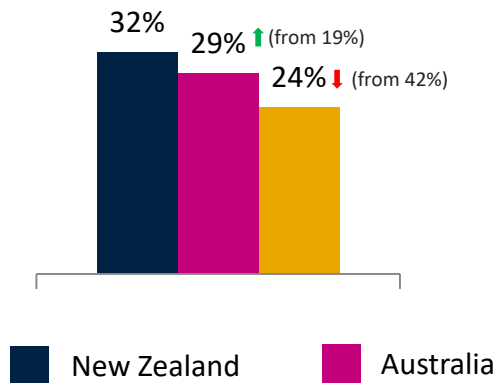
Those who had previously visited Queenstown had significantly higher expectations of: -

- finding **good food and wine** in the region (43% vs. 28%)
- the region being a **relaxing place to visit** (56% vs. 43%)

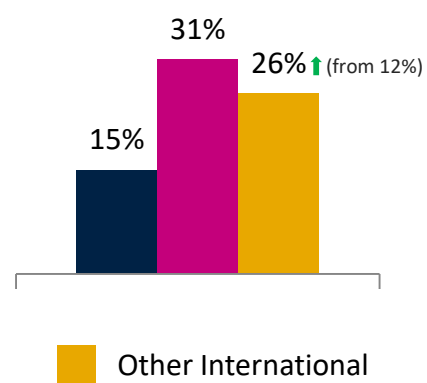
# TIME BETWEEN BOOKING AND ARRIVAL

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 +



↑↓ Significant increase/decrease vs. Q3 2016

Booking to Arrival Lag [Single Response]	New Zealand	Australia	Other International
I didn't book anything before I arrived	1%	0%	2%
Less than a week	13%	14%	11%
One week to a month	19%	14%	13%
1 month	15%	7%	17%
2 months	16%	5%	10%
3 months	13%	17%	12%
4 months	6%	10%	4%
5 months	3%	2%	6%
6 months	8%	17%	14%
7 months	2%	2%	1%
8 months	1%	5%	5%
9 months	1%	5%	0%
10 months	1%	2%	1%
11 months	0%	0%	1%
12 months	0%	0%	1%
Between one and two years	2%	0%	2%
Between two and five years	0%	0%	0%
More than five years	1%	0%	0%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</i>

# TRAVEL COMPANIONS

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



## Solo

New Zealand: 16%  
Australia: 12%  
Other International: 12% ↓ (from 29%)



## Couple (2 People)

New Zealand: 43%  
Australia: 52%  
Other International: 42% ↑ (from 25%)



## Group (3+ people)

New Zealand: 35% ↓ (from 42%)  
Australia: 26% ↓ (from 45%)  
Other International: 38% ↓ (from 46%)

↑↓ Significant increase/decrease vs. Q3 2016

Travel Companions [Multiple Response]	New Zealand	Australia	Other International
No-one, I am travelling on my own	16%	12%	12%
My partner/spouse	54%	57%	52%
My child or children	12%	12%	6%
Other members of my family	14%	14%	11%
A friend or friends	18%	14%	24%
Work/business colleagues	2%	2%	1%
Other members of a tour group	1%	2%	6%
Other members of an organised group	0%	0%	0%
Other people	1%	0%	0%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</i>

## Average Size of Travel Group

### New Zealand

3.3 Adults  
0.3 Children

### Australia

5 Adults  
0.3 Children

### Other International

4.2 Adults  
0.1 Children

# LENGTH OF CURRENT TRIP

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

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

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



**New Zealand Visitors:**  
Average **3** nights spent in Queenstown  
of a 5 night trip



**Australian Visitors:**  
Average **5** nights spent in Queenstown  
of an 12 night trip



**Other International Visitors:**  
Average **4** nights spent in Queenstown  
of a 29 night trip

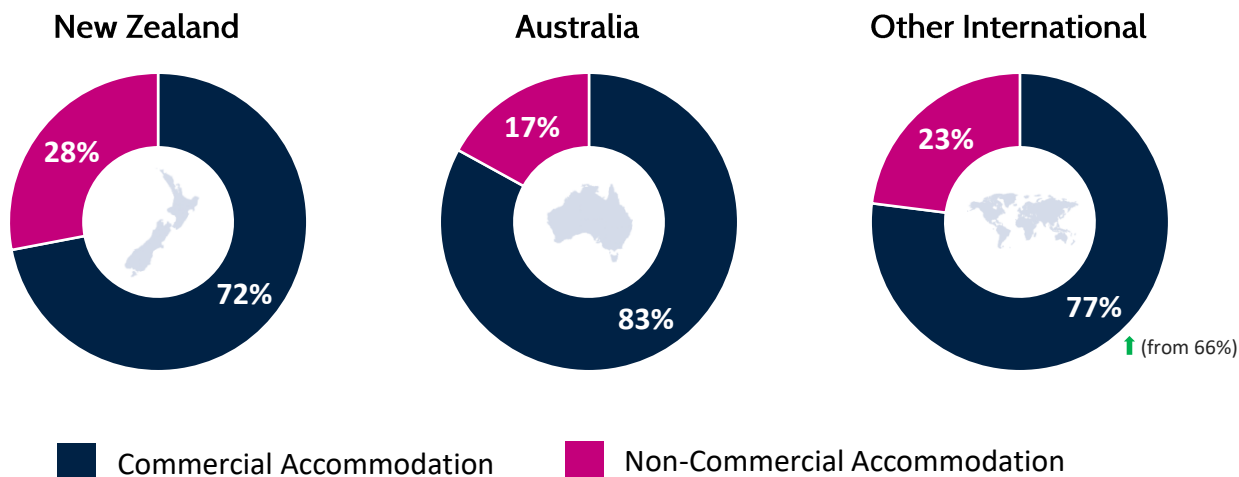


Base: New Zealand (n=127); Australia (n=42); Other International (n=84)



# ACCOMMODATION

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



↑↓ Significant increase/decrease vs. Q3 2016

Main Accommodation [Single Response]	New Zealand	Australia	Other International
<b>Commercial Accommodation</b>			
Hotel	35%	40%	29%
Motel	13%	7%	8%
Serviced apartment	10%	17%	7%
Backpackers/hostel	8%	10%	19%
Exclusive/luxury lodge	2%	7%	7%
Camping ground/holiday park	4%	2%	7%
<b>Non-Commercial Accommodation</b>			
Private home/holiday home - no payment made	13%	2%	4%
Private home/holiday home - rented	7%	7%	7%
Bed/room in a private home - rented (e.g. Airbnb)	1%	5%	6%
Bed and Breakfast	1%	0%	0%
Homestay or Farmstay	2%	0%	2%
National Park DoC hut or tent site	1%	2%	1%
Freedom camping (tent, campervan etc.)	0%	0%	1%
Other	4%	0%	1%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</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
Skyline Gondola and lookout	51%	71%	54%
Restaurants and cafés, bars/nightclubs	64%	62%	49%
Sightseeing (on foot, by road, cable car, or rail – independently or on a tour – including popular attractions)	45%	48%	52%
Walking, hiking, climbing, trekking, tramping	35%	55%	46%
A visit to Fiordland/Milford Sound	17%	50%	50%
A visit to Arrowtown	50%	40%	25%
Shopping	45%	40%	29%
Lake cruising or boating (including fishing, water skiing)	24%	38%	18%
Extreme activities (bungy, canyon swings, skydiving)	17%	36%	27%
River and lake adventures (e.g. jetboating, rafting)	17%	36%	25%
A visit to Glenorchy	20%	21%	17%
Wineries or other wine experiences	20%	24%	7%
Lord of the Rings, Hobbit or other film-related sightseeing tours and activities	6%	17%	14%
Viewing, learning about or interacting with birds or animals	8%	7%	14%
Art galleries, museums, historic buildings or sites or other cultural or heritage attractions	13%	10%	5%
Wellness experiences	12%	12%	2%
Other soft adventure or sports activities (such as horse riding)	4%	7%	13%
Flying/air activities	5%	10%	8%
Cycling/biking	11%	10%	2%
Ski, snow, ice activities	6%	0%	8%
Golf	2%	10%	2%
Event, concert or festivals	2%	0%	2%
None of the above	2%	0%	0%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</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	Q4 2014	Q4 2015	Q4 2016
Accommodation	8.3	8.4	8.3
Transport to Queenstown	8.3	8.0	8.0
Local transport options and services	7.7	7.4	7.6
Traffic and car parking	6.5*	5.9*	5.9
Public facilities (parks, toilets)			8.2
Natural environment	-	-	9.1
Cleanliness/presentation of town/region	8.6	8.4	8.6
Activities and attractions	8.7	8.5	8.6
Restaurants, cafes and bars in Queenstown	8.5	8.4	8.5
Overall experience in the Queenstown region	8.7	8.8	8.9
Australia	Q4 2014	Q4 2015	Q4 2016
Accommodation	8.9	8.5	8.8
Transport to Queenstown	8.6	8.8	8.8
Local transport options and services	8.0	7.2	8.3
Traffic and car parking	6.9*	6.8*	7.1
Public facilities (parks, toilets)			8.3
Natural environment	-	-	9.6
Cleanliness/presentation of town/region	9.2	9.1	9.2
Activities and attractions	9.0	9.1	9.1
Restaurants, cafes and bars in Queenstown	8.4	8.6	8.9
Overall experience in the Queenstown region	9.2	9.2	9.4
Other International	Q4 2014	Q4 2015	Q4 2016
Accommodation	8.0	8.1	8.4
Transport to Queenstown	8.5	8.4	8.9
Local transport options and services	8.1	7.4	8.4
Traffic and car parking	6.8*	6.8*	7.4
Public facilities (parks, toilets)			9.0
Natural environment	-	-	9.5
Cleanliness/presentation of town/region	8.9	9.0	9.3
Activities and attractions	8.6	8.6	9.1
Restaurants, cafes and bars in Queenstown	8.4	8.3	8.8
Overall experience in the Queenstown region	8.7	8.6	9.1

\*Previously 'Parking and other public facilities'

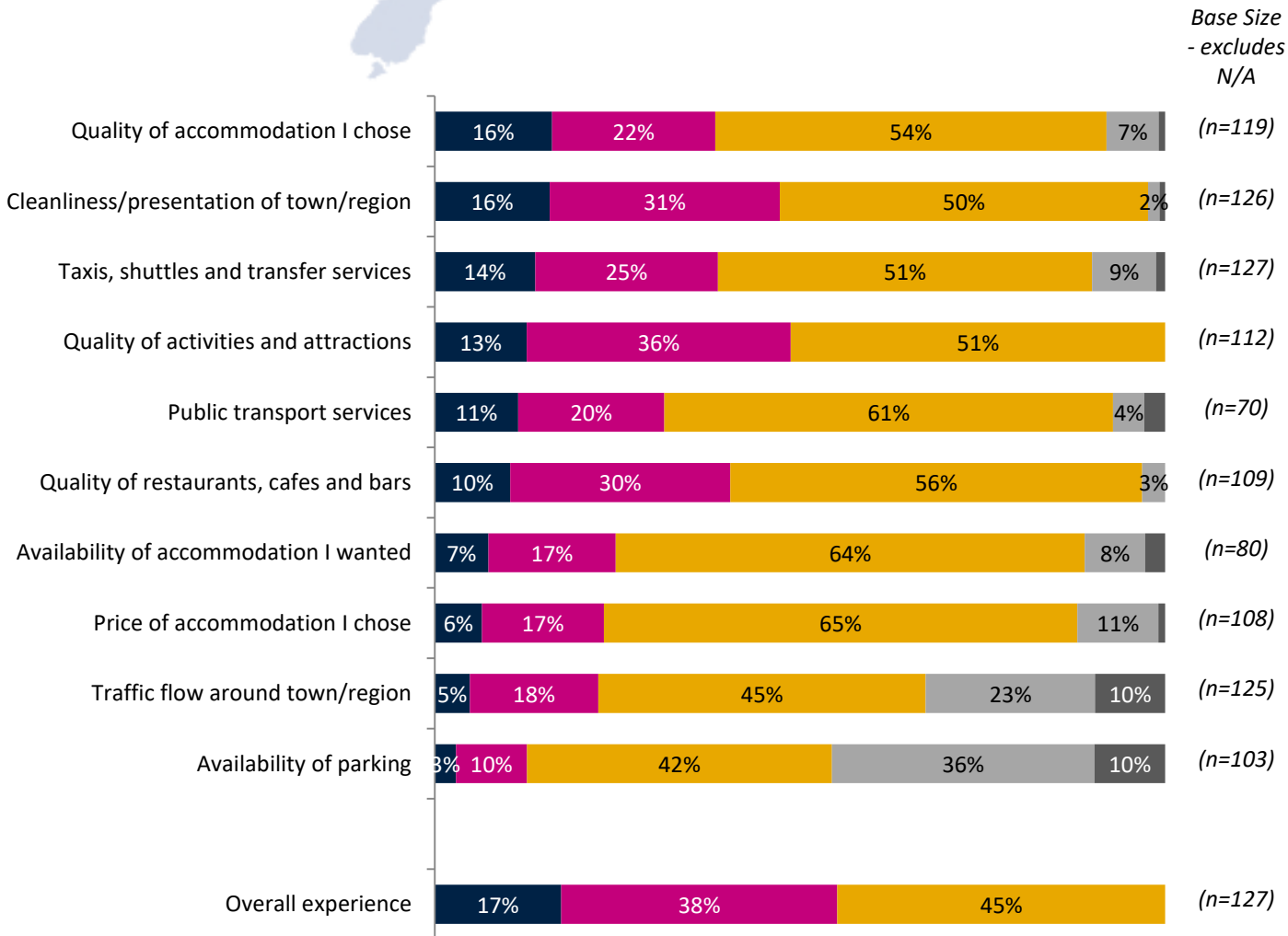


# EXPERIENCE VS. EXPECTATIONS

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



## New Zealand Visitors



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

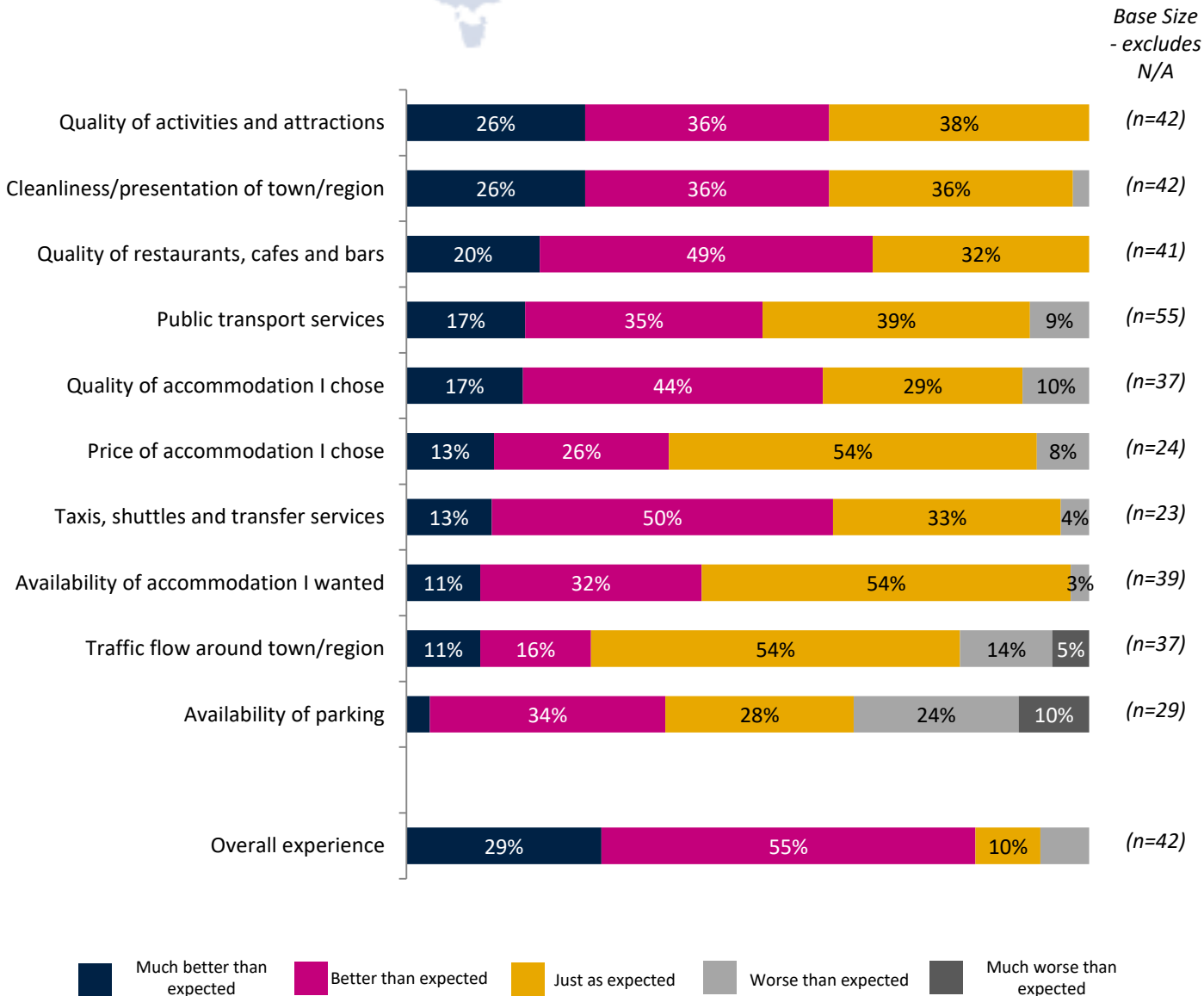


# EXPERIENCE VS. EXPECTATIONS

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



## Australian Visitors

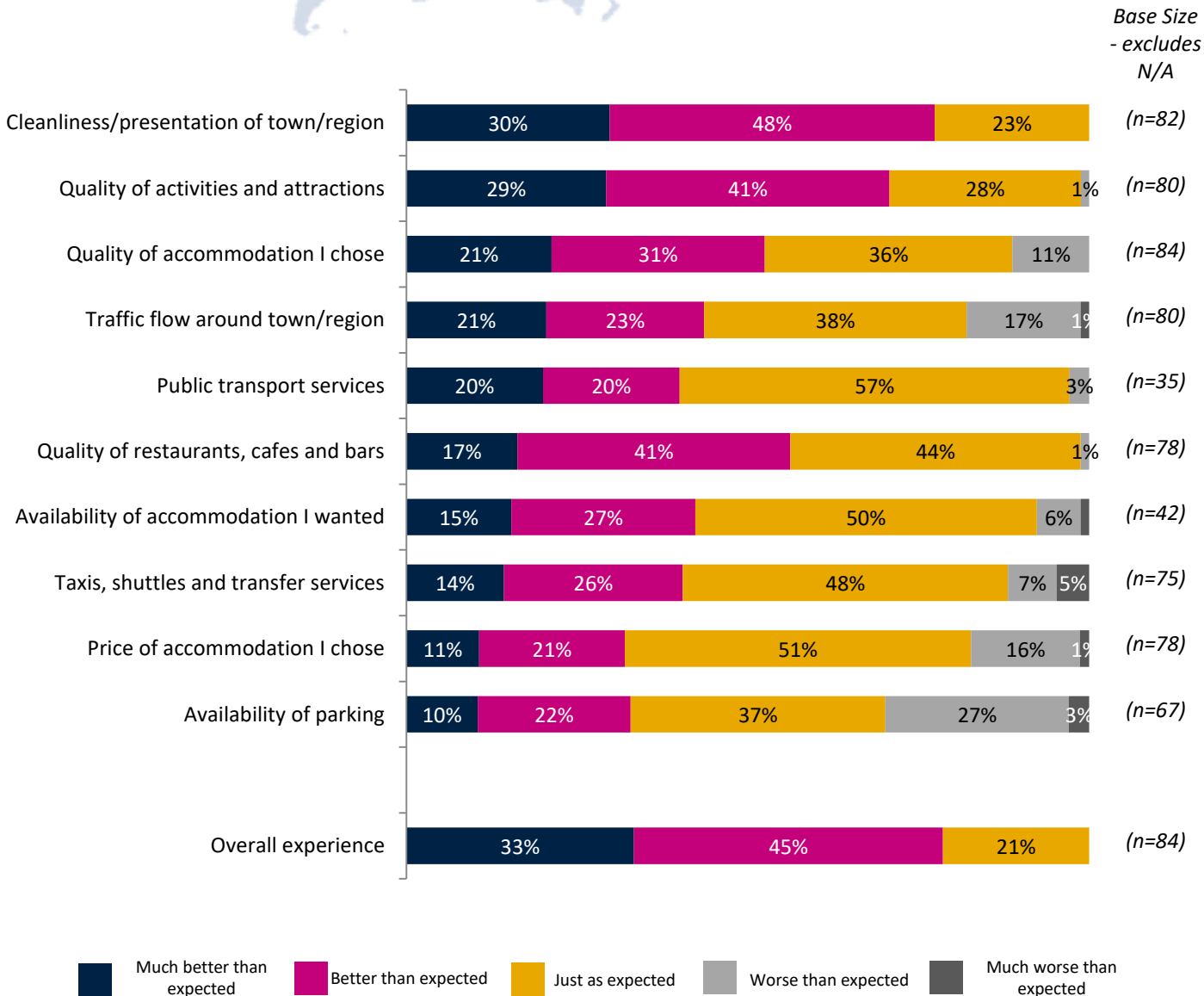


# EXPERIENCE VS. EXPECTATIONS

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?

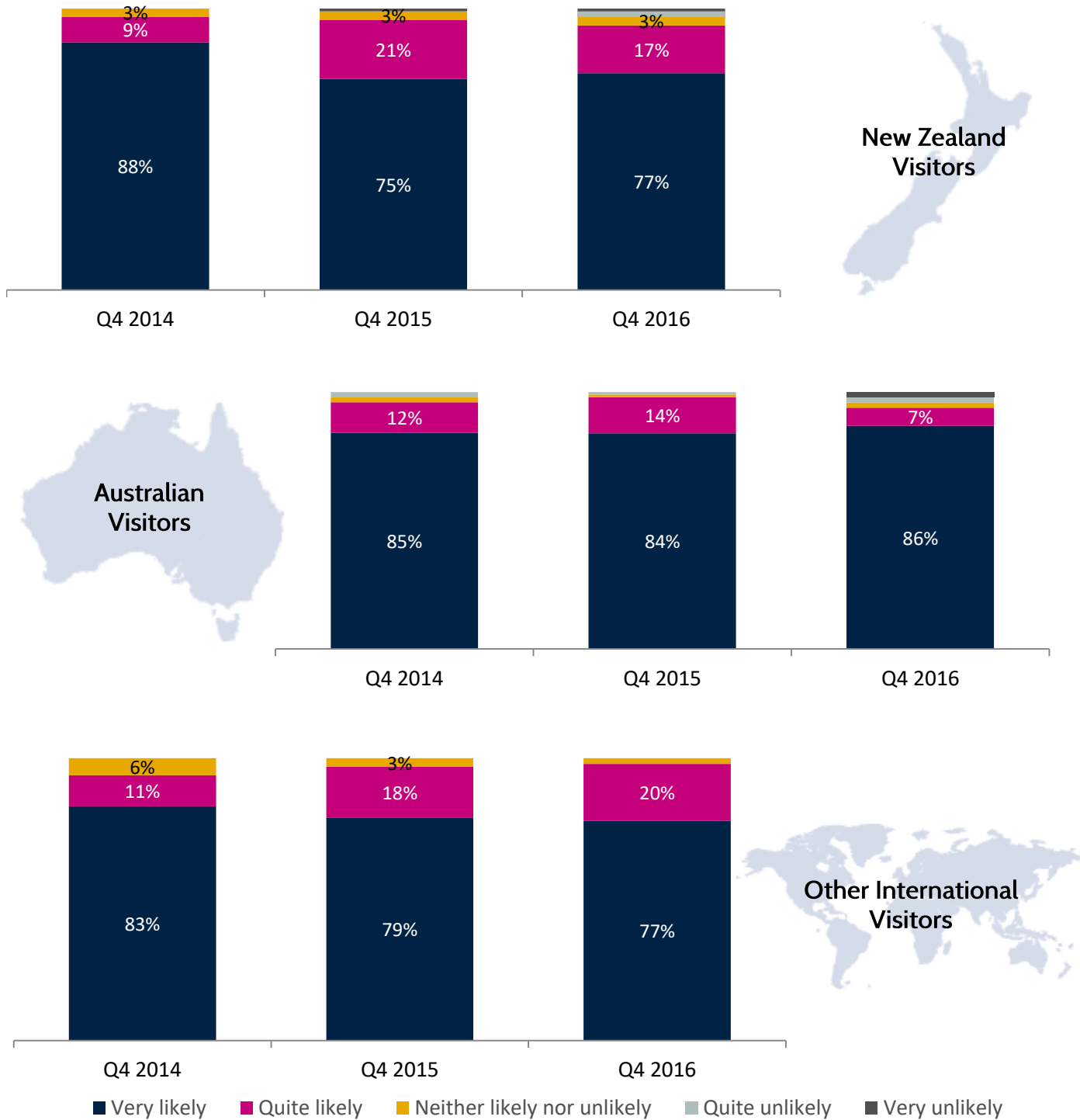


## Other International Visitors



# PROPENSITY TO RECOMMEND QUEENSTOWN

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

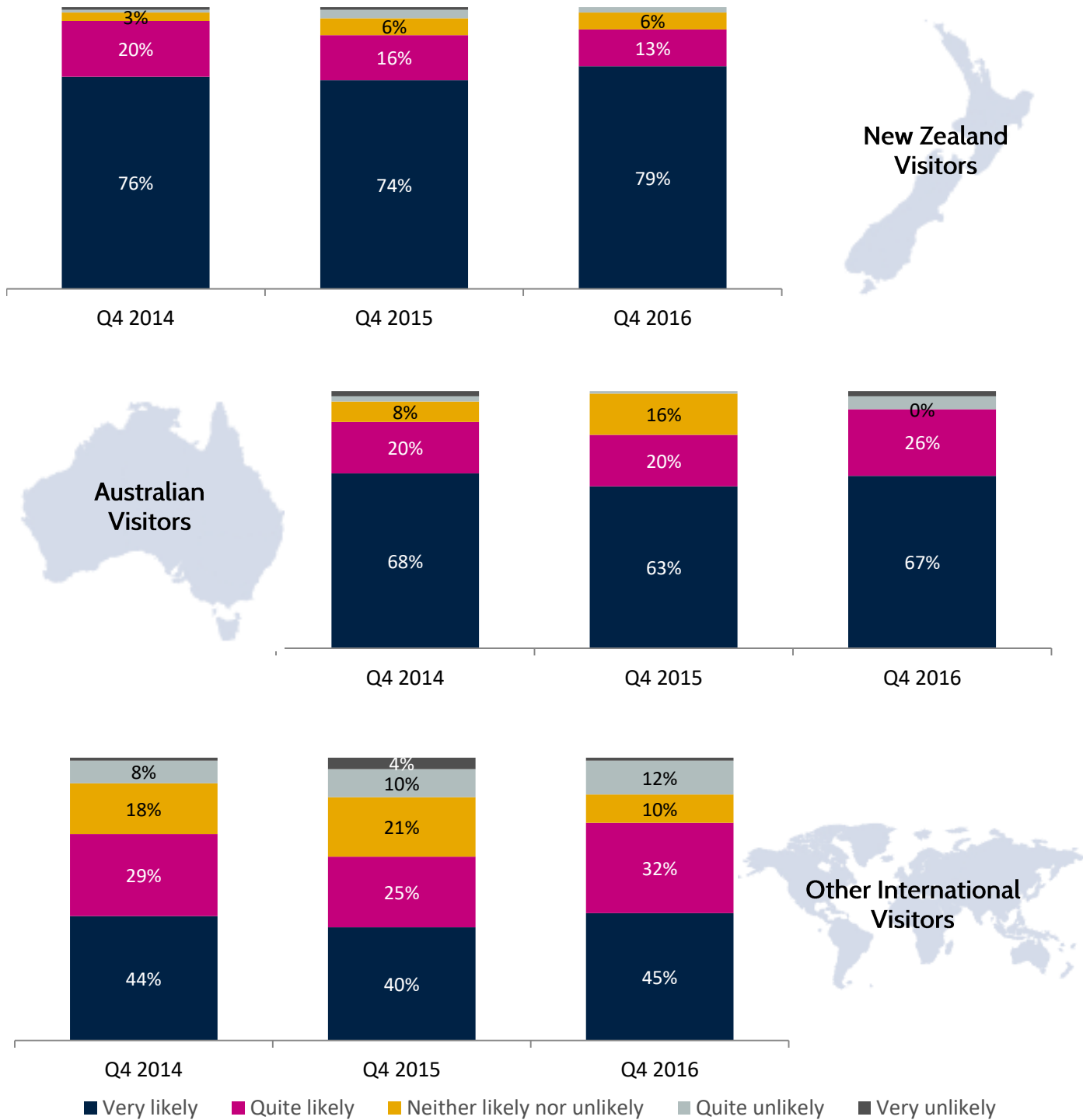


Base: New Zealand (n=127); Australia (n=42); Other International (n=84)



# PROPENSITY TO RETURN TO QUEENSTOWN

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



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





# DEMOGRAPHICS

## Sample Profile

Gender	New Zealand	Australia	Other International
Male	50%	50%	50%
Female	50%	50%	50%
Age	New Zealand	Australia	Other International
15-17 years	2%	0%	1%
18-19 years	1%	2%	0%
20-24 years	15%	21%	20%
25-29 years	12%	17%	19%
30-34 years	12%	7%	15%
35-39 years	13%	10%	7%
40-44 years	4%	7%	4%
45-49 years	3%	10%	2%
50-54 years	7%	5%	5%
55-59 years	12%	5%	10%
60-64 years	11%	5%	7%
65-69 years	3%	7%	6%
70-74 years	3%	5%	1%
75+ years	2%	0%	0%
Would rather not say	0%	0%	2%
Previous Visits to Queenstown	New Zealand	Australia	Other International
None (First Visit to Queenstown)	23%	79%	77%
1-5 Previous Visits	48%	17%	23%
6-10 Previous Visits	13%	5%	0%
11-20 Previous Visits	9%	0%	0%
21+ Previous Visits	8%	0%	0%
<i>Base: Total Sample</i>	<i>(n=127)</i>	<i>(n=42)</i>	<i>(n=84)</i>

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



# DEMOGRAPHICS

## Sample Profile

### Region of Residence (New Zealand)

Northland	2%
Auckland	42%
Waikato	8%
Bay of Plenty	6%
Gisborne	1%
Hawkes Bay	2%
Taranaki	1%
Manawatu/Whanganui	1%
Wellington (& Wairarapa)	8%
Marlborough	2%
Nelson	2%
Tasman	2%
West Coast	0%
Canterbury	13%
Otago	5%
Southland	7%
<i>Base: New Zealand (n=127)</i>	

### Region of Residence (Australia)

Australian Capital Territory	2%
New South Wales	40%
Northern Territory	0%
Queensland	26%
South Australia	5%
Tasmania	0%
Victoria	19%
Western Australia	7%
<i>Base: Australia (n=42)</i>	

### Country of Origin (Other International)

Argentina	1%
Belgium	1%
Brazil	2%
Canada	5%
China	8%
Finland	1%
Germany	6%
Hong Kong	1%
India	1%
Indonesia	1%
Japan	5%
Korea	2%
Malaysia	4%
Nepal	1%
Netherlands	2%
Norway	1%
Philippines	4%
Saudi Arabia	1%
Singapore	5%
Spain	4%
Sweden	1%
Switzerland	2%
Thailand	1%
United Kingdom	18%
United States	20%
<i>Base: Other International (n=84)</i>	

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



## 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.