

QUEENSTOWN VISITOR SURVEY

2021/22 – Quarter 2 Update

SUMMARY - YEAR ENDING DECEMBER 2021

VISIT MOTIVATORS

Almost all domestic visitors to Queenstown are travelling for a holiday or short break. For one third of this group a visit to Queenstown is based around one specific attraction or experience – most commonly skiing/snowboarding, Skyline Queenstown, or Milford Sound.

Experiencing Queenstown's outstanding natural landscapes is what domestic visitors most commonly want from their visit to the destination. Other important motivators are spending time with loved ones, discovering new places/experiences, undertaking tourism activities, and relaxing and taking time out. Cantabrians are less motivated by some of these factors than other visitors.

However, an erosion over time in the prominence of many visit motivators and decision drivers is becoming evident. Particularly so in terms of domestic visitors coming to Queenstown to relax, Queenstown's reputation as a world-class destination, and the importance of Queenstown's tourism activities/experiences in the decision to visit.

TRAVEL BEHAVIOUR

Domestic visitors to Queenstown are very likely to travel with a partner/spouse, and almost one in two are travelling as a couple with no other companions. Almost two thirds include another destination on their itinerary - most commonly Wānaka and Milford Sound, but one in five don't leave the Queenstown town centre/Frankton area (i.e. they don't explore the wider Queenstown region, or other regions). The average length of stay for domestic visitors is three nights, and one in four are on their first visit.

The proportion of domestic visitors from Auckland has decreased significantly – likely due to the four month regional lockdown in that area. At the same time the proportion of visitors from Wellington and Christchurch has increased.





SUMMARY - YEAR ENDING DECEMBER 2021

When choosing accommodation, price is the most common deciding factor but location and special offers are also commonly considered. Almost half of domestic visitors stay in a hotel, and one in five Aucklanders rent a holiday house. Very few domestic visitors stay in non-commercial accommodation. Domestic flights are the most common means of getting to Queenstown (especially for Aucklanders and Wellingtonians), and a rented vehicle or walking are the most common means of getting around Queenstown.

Visiting restaurants and cafes, shopping, and sightseeing are the most popular activities and experiences for domestic visitors, followed by walking/hiking and lake/river activities. Just one in five visitors participate in an adrenaline activity.

Two fifths of visitors were not able to do every activity or attraction they would have liked to during their visit. Unmet potential is highest for Skyline Queenstown, jetboating, skiing/snowboarding, and lake cruises.

SATISFACTION WITH VISITOR EXPERIENCE

Domestic visitors are generally very satisfied with their experience in Queenstown. Ease of walking around Queenstown and ease of way finding rate highly. One area that clearly causes dissatisfaction however is ease of parking vehicles - this is notable as almost two thirds of domestic visitors use a private or rented vehicle to get around. Queenstown is also well perceived as a destination that's safe, clean and tidy, and welcoming (all rate an average of 8.7 or above, out of ten).

At an average of 9.0 out of ten, domestic visitors' rating of their overall experience in Queenstown is very high. Enthusiasm towards the destination is also reflected in a high Net Promoter Score (NPS). At +71 it is 13 points higher than the NPS for New Zealand as a whole. Further, four in five visitors express an intention to visit Queenstown again within the next two years.





BACKGROUND & METHODOLOGY



The Queenstown Visitor Survey (QVS) helps Destination Queenstown and members better understand the profile, travel behaviour, expectations and experiences of visitors to the Queenstown region.

The QVS sample primarily includes domestic visitors (given the current COVID-19 related border restrictions). In order to be included in the sample, visitors must be 18+ and have spent at least one night in the Queenstown region (the area between Glenorchy, Cardrona, Gibbston Valley and Kingston). Respondents are recruited at key visitor sites around Queenstown, on randomly selected days each quarter. A combination of sites is used to ensure a good cross-section of visitors is included in the survey.

Visitors can provide an email address for distribution of a link to the online survey or scan a QR code to access and complete the survey on their own device at the time of intercept. A tablet is also available for visitors who wish to complete the survey at the time of intercept but don't have a suitable device on which to do so. As incentive to participate respondents are offered the chance to enter a quarterly prize draw to win a NZ\$250 Prezzy card.

N=150 responses are collected from domestic visitors each quarter, aggregating to n=600 responses per year. The current sample size attracts a margin of error of +/-8.0% on a quarterly basis and +/-3.9% on an annual basis.

Following are the latest findings in an ongoing series of quarterly updates. Responses are from visitors to Queenstown during January 2021 – December 2021. As the sample grows further analysis will be possible, including any seasonal patterns and trends over time.



PURPOSE OF TRAVEL

Firstly, what is/was the main purpose of your visit to Queenstown?
 [Of holiday/short break visitors] Was there one specific attraction or experience that your visit to Queenstown is/was based around?
 [Of holiday/short break visitors] What is/was that attraction or experience?

Purpose of Travel	
Holiday/vacation or short break	89%
Visit family or friends	3%
For other business reasons	2%
To attend a conference, convention, or other business event	1%
To attend an event held by friends or family	1%
To make a transport connection/just passing through on way to somewhere else	1%
For education/study	1%
To attend an event held by someone else	0.3%
Other	1%
Base: Total Sample Jan 21 – Dec 21	n=620

➔ **32%** of visitors on holiday/vacation or a short break travelled to Queenstown to see/do one specific attraction or experience, which included.....

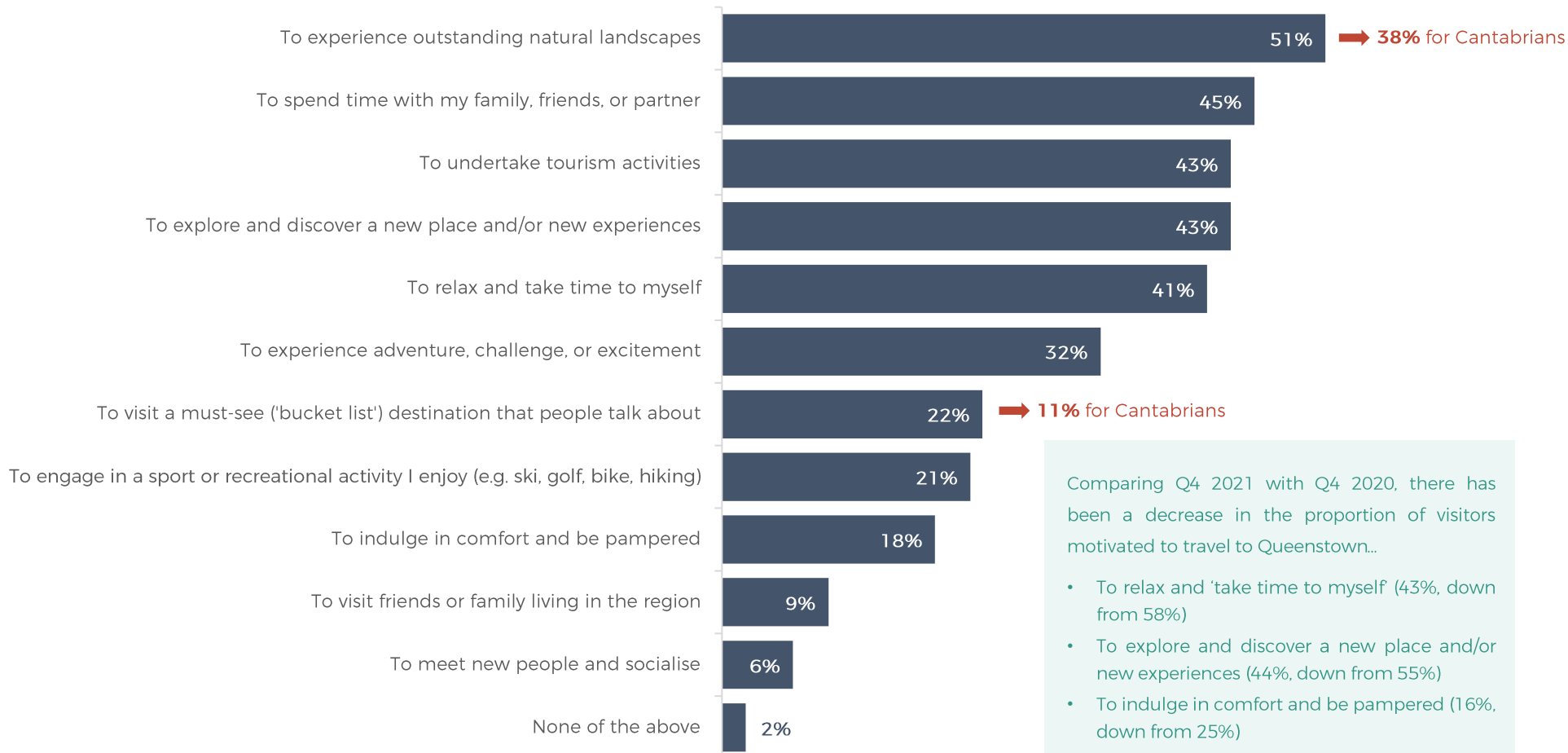


In Q4 2021, 29% of holiday visitors based their visit to Queenstown around one specific attraction or experience, down from 37% in Q3 2021. The most commonly mentioned 'driver' attraction/experience in Q4 2021 was Milford Sound and the Routeburn and Milford Great Walks.



VISIT MOTIVATORS

And which, if any, of the following do/did you want from your visit to Queenstown?



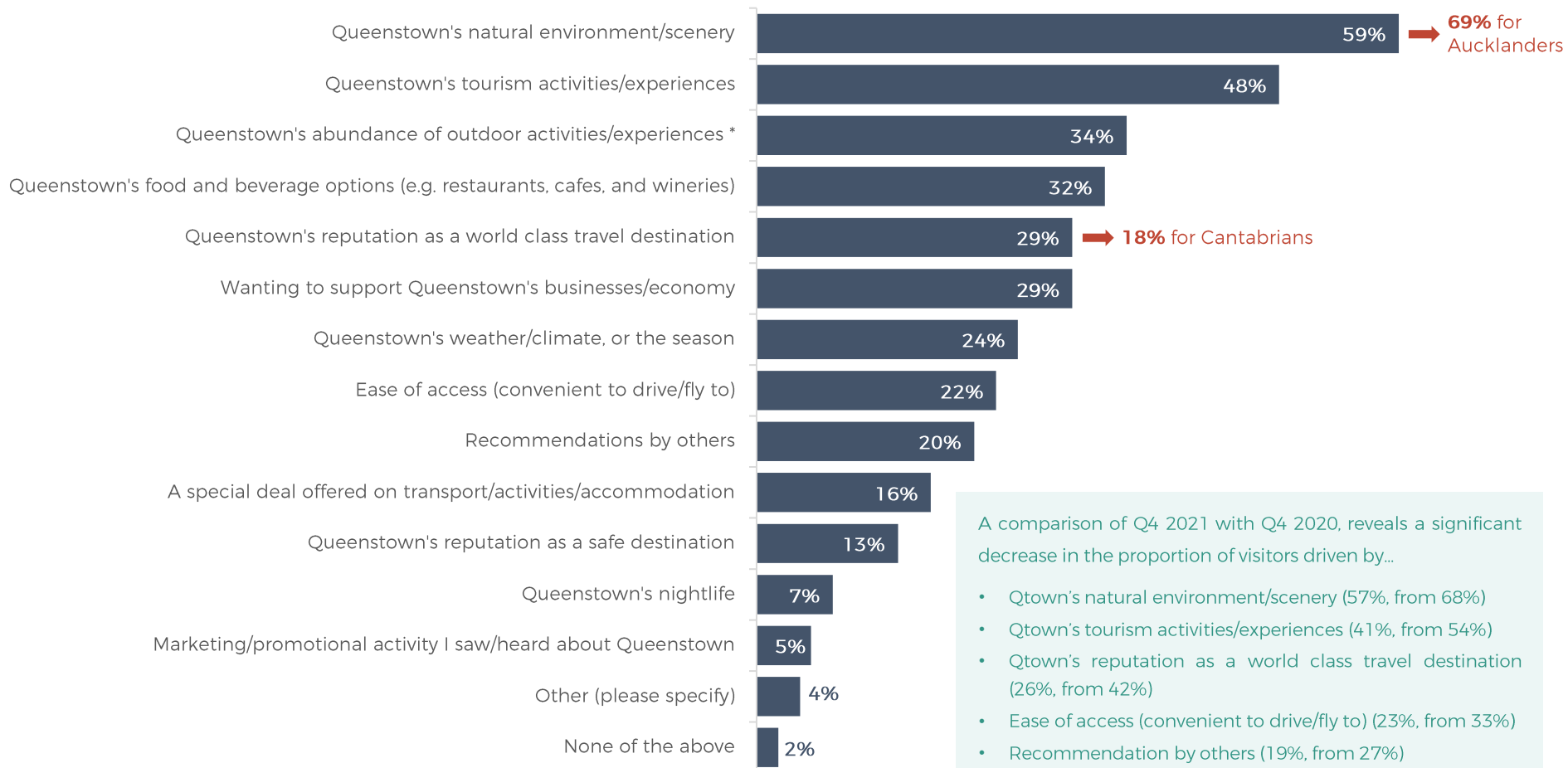
Comparing Q4 2021 with Q4 2020, there has been a decrease in the proportion of visitors motivated to travel to Queenstown..

- To relax and 'take time to myself' (43%, down from 58%)
- To explore and discover a new place and/or new experiences (44%, down from 55%)
- To indulge in comfort and be pampered (16%, down from 25%)



DESTINATION DECISION DRIVERS

Which, if any, of the following were also important in your decision to visit Queenstown?



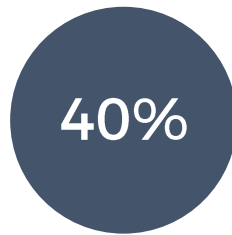


DESTINATION EXPERIENCE

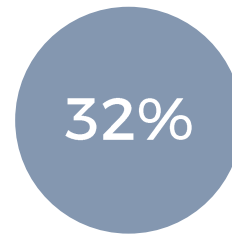
How many times have you visited Queenstown?



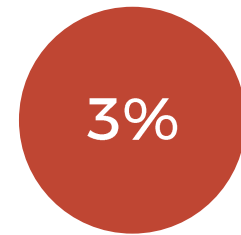
First visit
to Queenstown



Visited
once/few times



Visited
many times



Used to live
in Queenstown



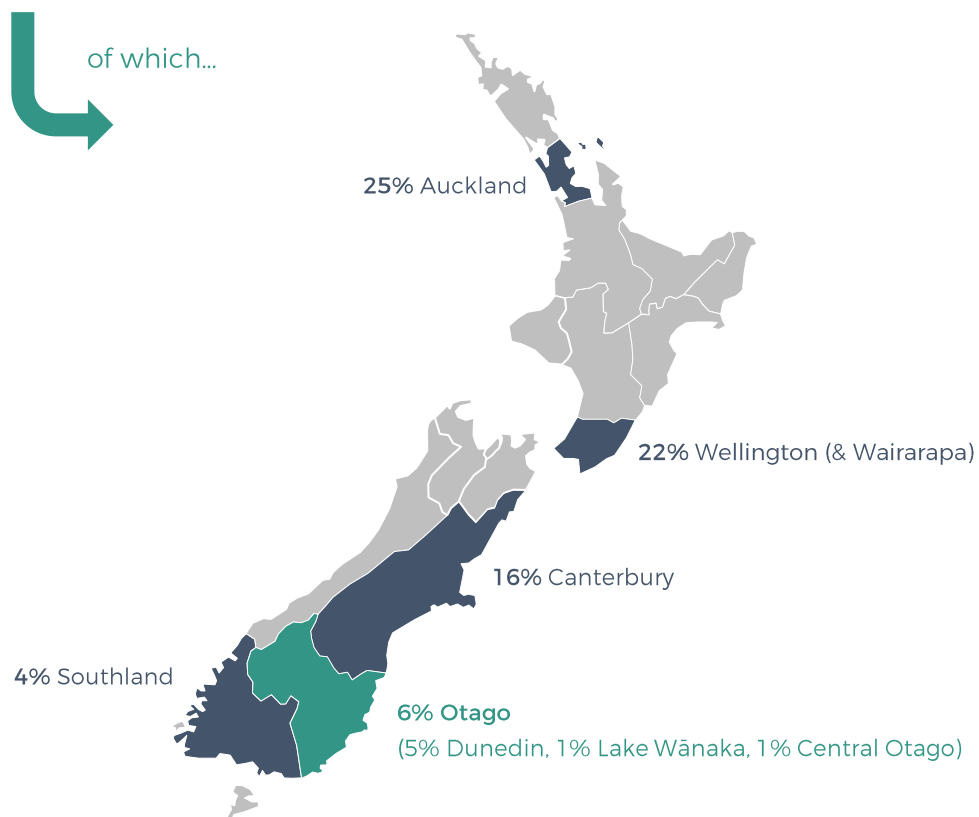
In Q4 2021, 37% of visitors had visited many times before. By comparison, this proportion was 22% in Q4 2020.



DISPERSAL/FLOWS

On your current (or most recent) trip to Queenstown, what location/region did you last stay overnight in before arriving in Queenstown? *

69% of visitors travelled to Queenstown directly from their region of residence



Of the 31% of visitors not travelling to Queenstown directly from their region of residence, the last locations stayed in overnight before arriving in Queenstown are..

Wellington (& Wairarapa) 18%, Auckland 15%, Canterbury 15%, Bay of Plenty 10%, Waikato 9%

Location last stayed overnight before Queenstown (top 10 overall)

Auckland	20%
Wellington	17%
Christchurch	12%
Southland	6%
Bay of Plenty (excl. Rotorua)	6%
Canterbury (excl. Christchurch)	6%
Lake Wānaka	5%
Dunedin	5%
Hamilton/Waikato (excl. Taupō & The Coromandel)	4%
Hawke's Bay	2%
Base: Total Sample Jul - Dec 21	n=312



DISPERSAL/FLOWS CONT.

How many times have you visited Queenstown?

What locations have you visited, or did you visit, on your trip to Queenstown?

And what New Zealand locations outside of Queenstown have you visited, did you visit, or do you intend to visit, as part of your trip?

Dispersion within Queenstown region	
Queenstown town centre	89%
Frankton ¹	52%
Arrowtown	59%
Cardrona	26%
Glenorchy	25%
Lake Hayes	23%
Gibbston Valley	19%
Arthur's Point ²	16%
Other Queenstown urban area ²	11%
Kingston	11%
Kelvin Heights/Kelvin Peninsula	10%
Other	8%
Base: Total Sample Jan 21 – Dec 21	n=620

Aucklanders are more likely than other visitors to visit Arrowtown (69%) and Glenorchy (34%), while Cantabrians are less likely than other visitors to visit Arrowtown (42%), Cardrona (11%), Glenorchy (14%) and Lake Hayes (13%).

Other regions visited	
None – Queenstown region only	36%
Wānaka	39%
Milford Sound	26%
Other location(s) in Fiordland outside of Milford Sound (incl. Te Anau)	17%
Canterbury (including Christchurch)	16%
Other location(s) in Otago outside of Queenstown and Wānaka (incl. Dunedin)	15%
Southland (including Invercargill)	12%
Other South Island region(s)	12%
West Coast	10%
North Island region(s)	5%
Base: Total Sample Jan 21 – Dec 21	n=620

20%

Only visit the town centre/Frankton area

(14% AKL., 23% WLG, 29% CAN residents)

36%

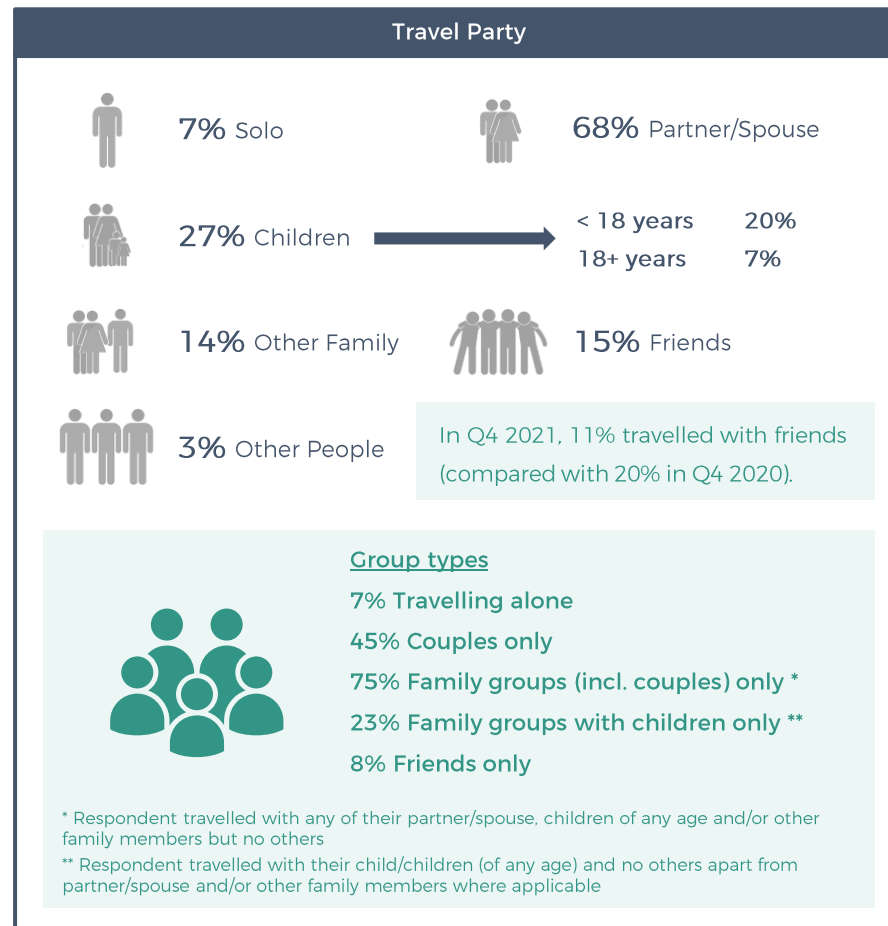
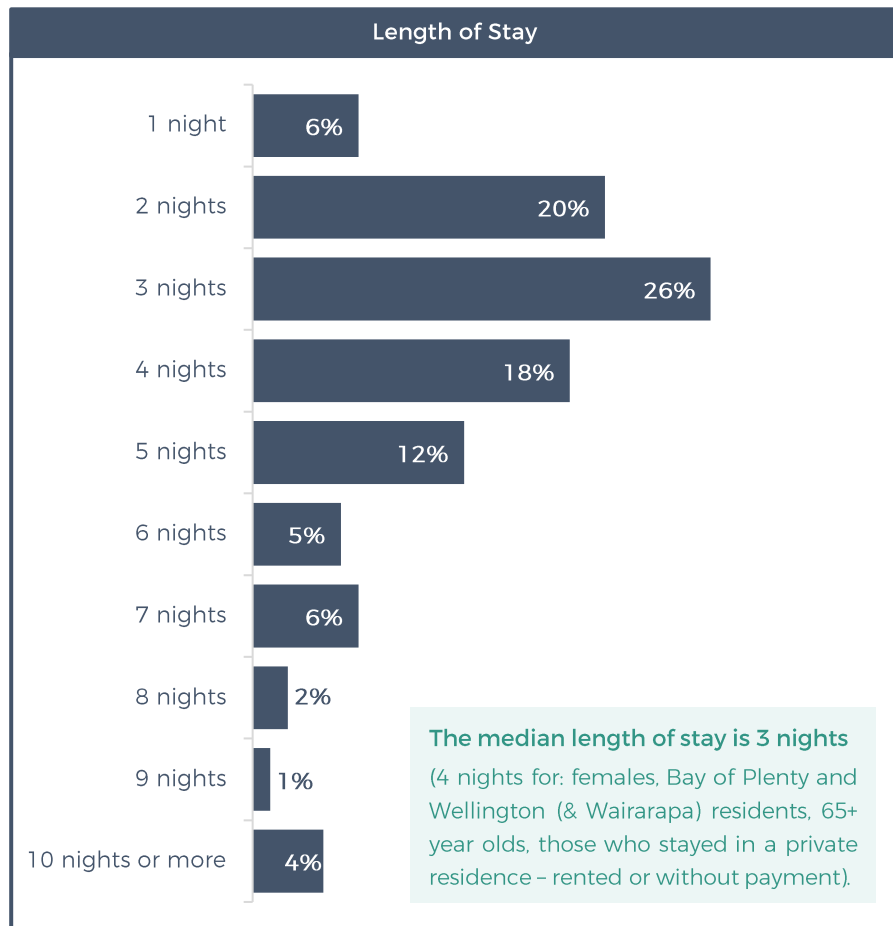
Only visit the Queenstown region

(35% AKL, 37% WLG, 34% CAN residents)



LENGTH OF STAY / TRAVEL COMPANIONS

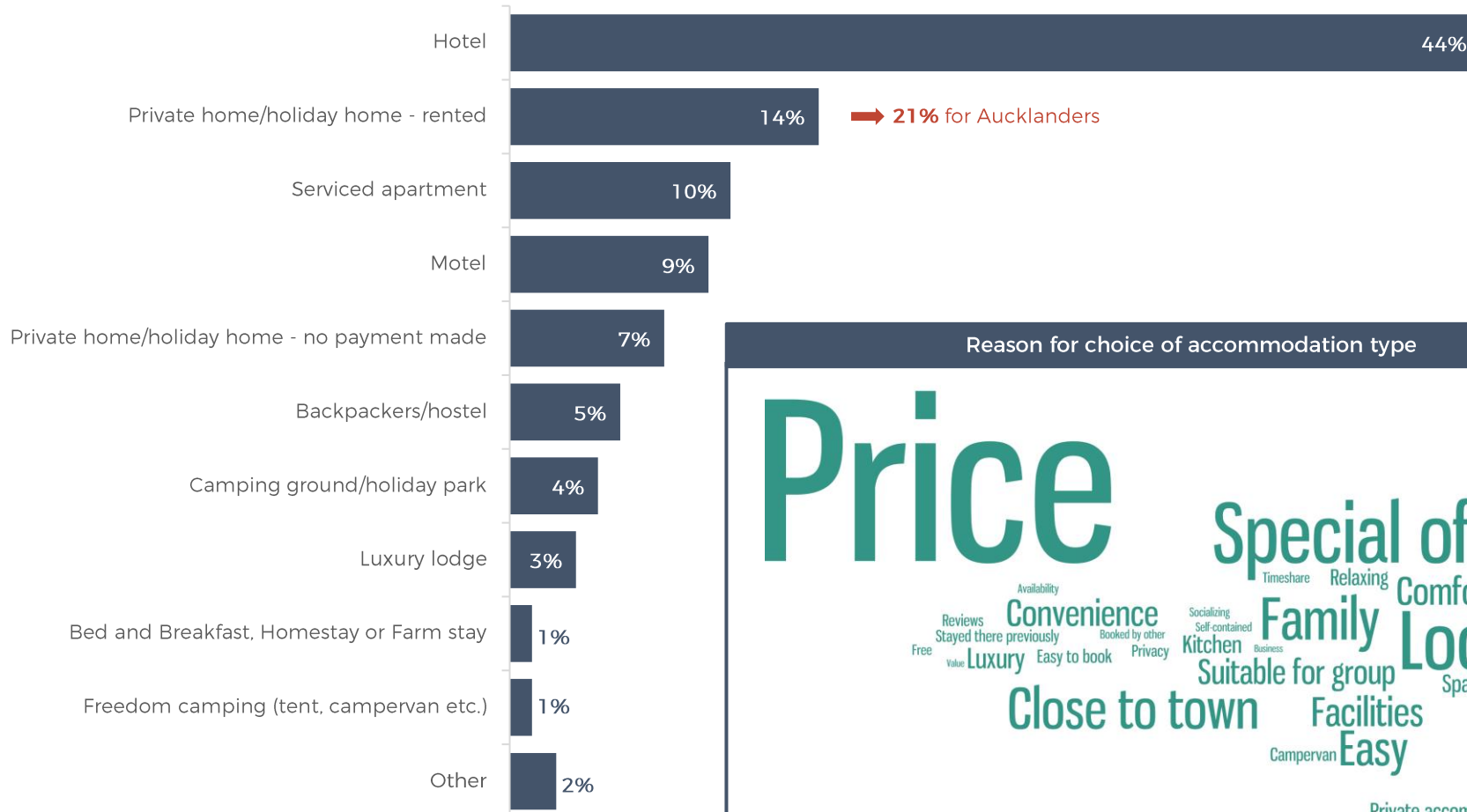
How many nights in total do you intend to stay, or did you stay, in Queenstown?
Who travelled/is travelling with you?





ACCOMMODATION

What is/was the main type of accommodation you used on this trip to Queenstown?
 What was the main reason you chose this type of accommodation?





ACCOMMODATION CONT.

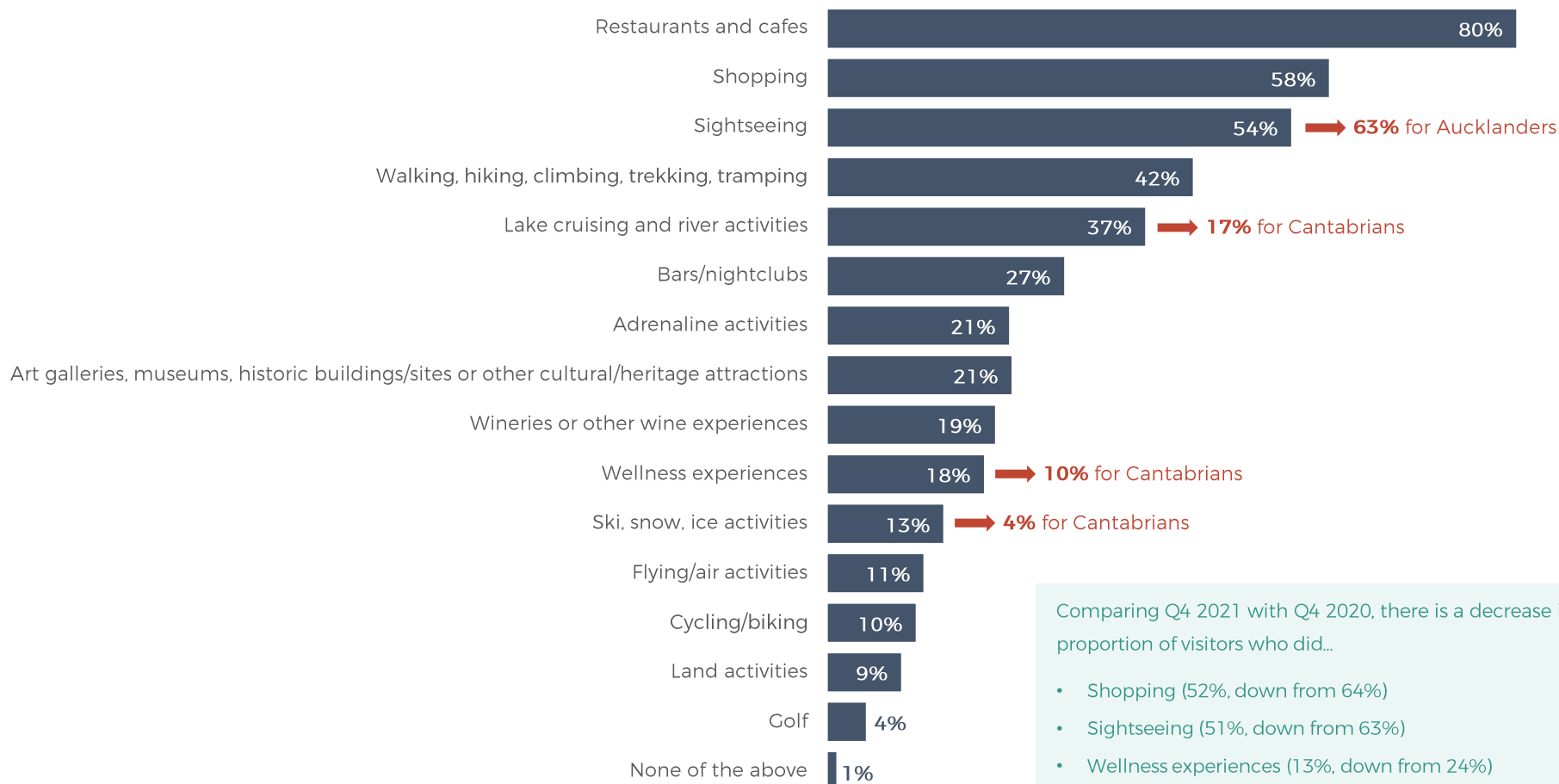
What was the main reason you chose this type of accommodation?





ACTIVITIES/EXPERIENCES

Which of the following have you done, or did you do, while in Queenstown? (on this trip)



Comparing Q4 2021 with Q4 2020, there is a decrease in the proportion of visitors who did...

- Shopping (52%, down from 64%)
- Sightseeing (51%, down from 63%)
- Wellness experiences (13%, down from 24%)



ACTIVITIES/EXPERIENCES – UNMET POTENTIAL

What other Queenstown activities and attractions, if any, would you have liked to visit/experience but haven't or didn't? (and why?)

39% of visitors mentioned a Queenstown activity/attraction they weren't able to visit/experience, but would have liked to

Queenstown Activities/Experiences – Unmet Potential

Skyline Queenstown (including gondola and luge)	13%
Jetboating (including Shotover Jet and Hydro Attack)	11%
Skiing and snowboarding	11%
Lake Cruise (including the TSS Earnslaw)	8%
Milford Sound	8%
Hiking and walking	7%
Scenic flights (including helicopters)	6%
Wineries, breweries and alcohol tasting	6%
Bungy jumping	5%
Biking/cycling	5%
Cardrona, The Remarkables Coronet Peak	4%
Skydiving	4%
Other locations (including Glenorchy, Arrowtown, Wānaka)	4%
Paragliding	3%
River activities (including whitewater rafting)	3%

Base: Didn't experience an activity/attraction they wanted to n=243

"We ran out of time but I would've loved to have done the winery tours, the Nevis thrillology combo, Glenorchy, snowboarding at Coronet Peak, visiting Cardrona and the iconic bra fence, the minus 5 ice bar, the TSS Earnslaw tour, the sensory maze and cookie time bar"

"Escape room - didn't have time this visit. Drive around the region - especially Wanaka or down to Milford sound - didn't have a car this time, so was too expensive to do with 4 of us on a tour."

"More wineries, outdoor walks - not enough time"

"Walter Peak Farm visit lunch - couldn't do it as was sold out"

"River activities because we just ran out time. More shopping - too expensive."

"Due to bad weather paragliding, helicopter ride we had to cancel. but never mind - gives us reason for next time to come and explore this beautiful city"

"Milford Sound cruise - had to cancel due to weather warning"

"Paragliding - too little time and money. More tramping - too little time."



TRANSPORT

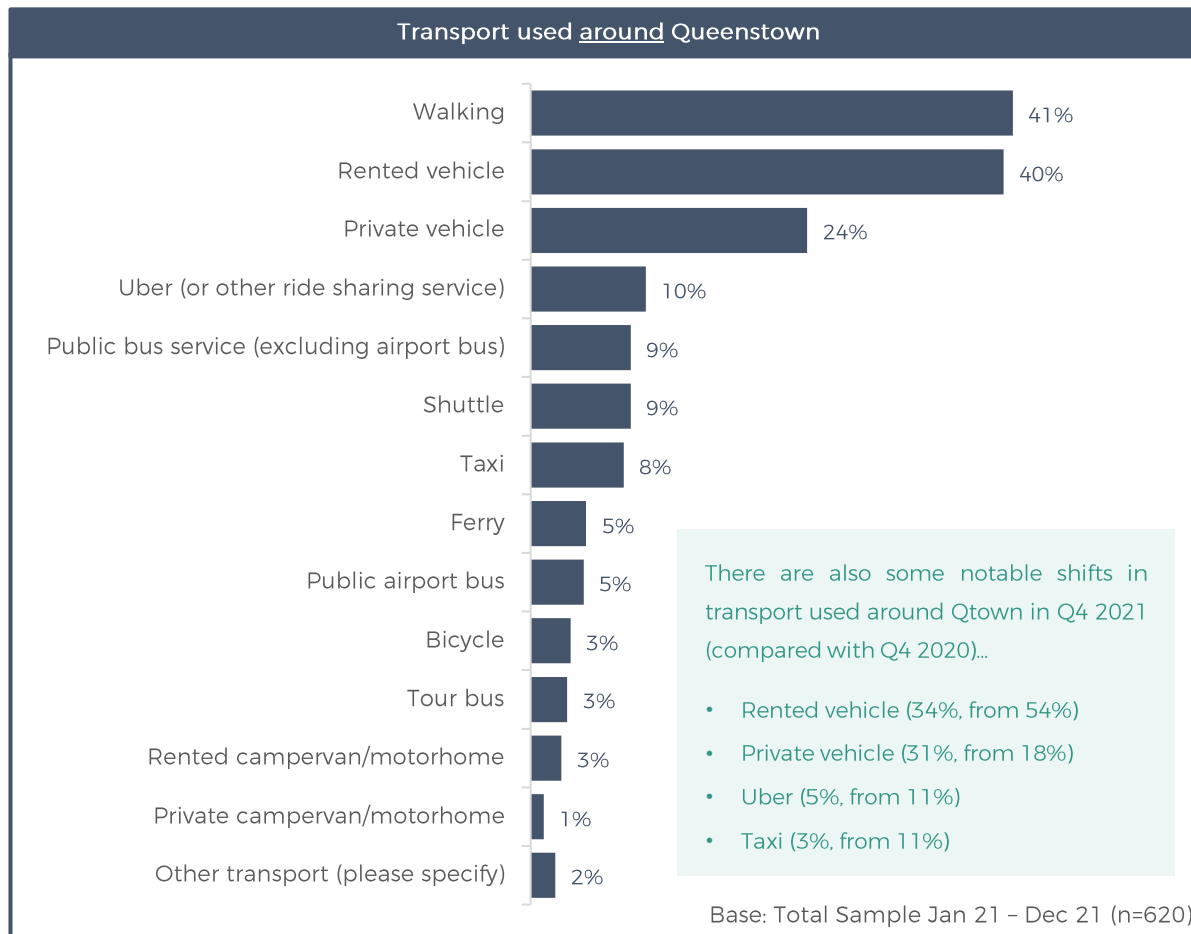
How did you get to Queenstown?
 What transport have you used (or did you use) for getting around Queenstown?

Transport used <u>to</u> Queenstown	%
Scheduled domestic flight	62%
Private vehicle	26%
Rented vehicle	11%
Scheduled bus/shuttle service	1%
Other transport	0.5%
Base: Total Sample Jan 21 – Dec 21	n=620

77% of Aucklanders, 80% of Wellingtonians and 17% of Cantabrians travelled to Queenstown on a domestic flight.

Comparing Q4 2021 with Q4 2020 reveals some notable shifts in transport used to get to Queenstown – likely due to the larger proportion of non-Auckland visitors in Q4 2021...

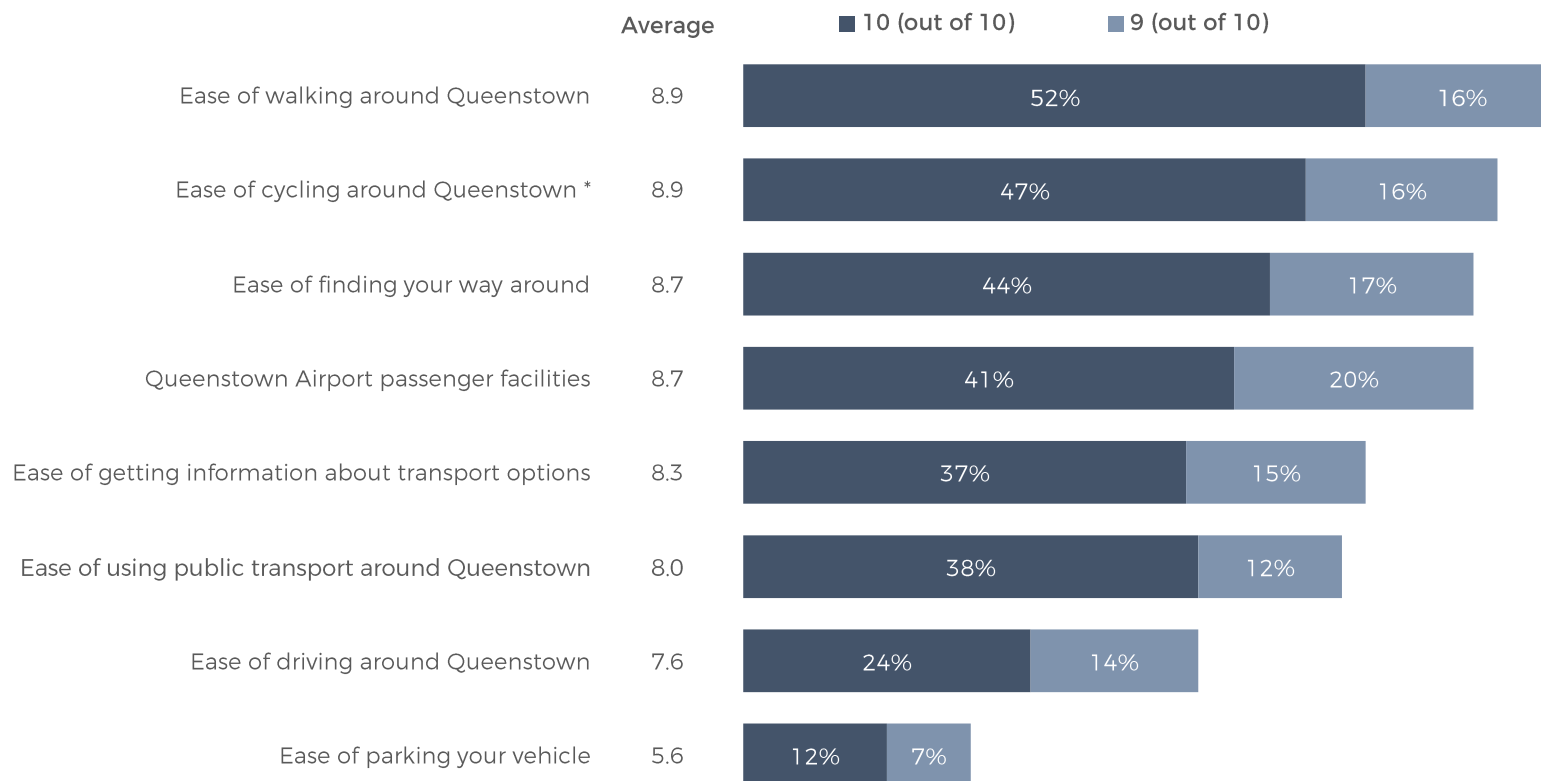
- Scheduled domestic flight (56%, from 70%)
- Private vehicle (37%, from 13%)
- Rented vehicle (7%, from 17%)





TRANSPORT SATISFACTION

On a scale of 0 (not at all satisfied) to 10 (extremely satisfied), how satisfied are you with these aspects of transport in Queenstown?
(some options display only if transport type used)



Compared to other visitors, Cantabrians experience lower satisfaction with 'ease of getting information about transport options' (7.4), 'ease of using public transport around Queenstown' (7.2), 'ease of driving around Queenstown' (6.6), and 'ease of parking' (4.7).

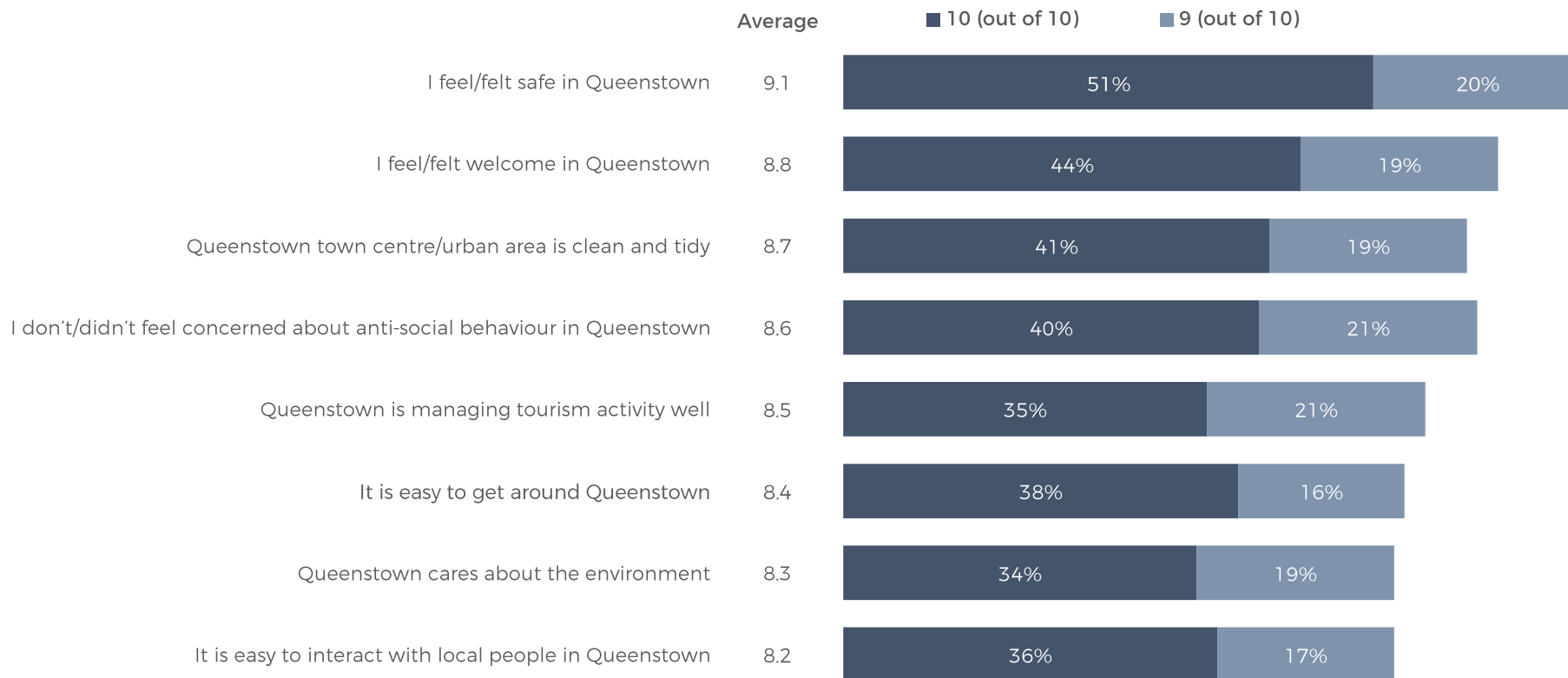
* Caution low sample size

Note: calculation of % of agreement excludes all 'N/A' responses



QUALITY OF VISITOR EXPERIENCE

To what extent do you agree or disagree with the following statements? [On a scale of 0: Strongly Disagree to 10: Strongly Agree]

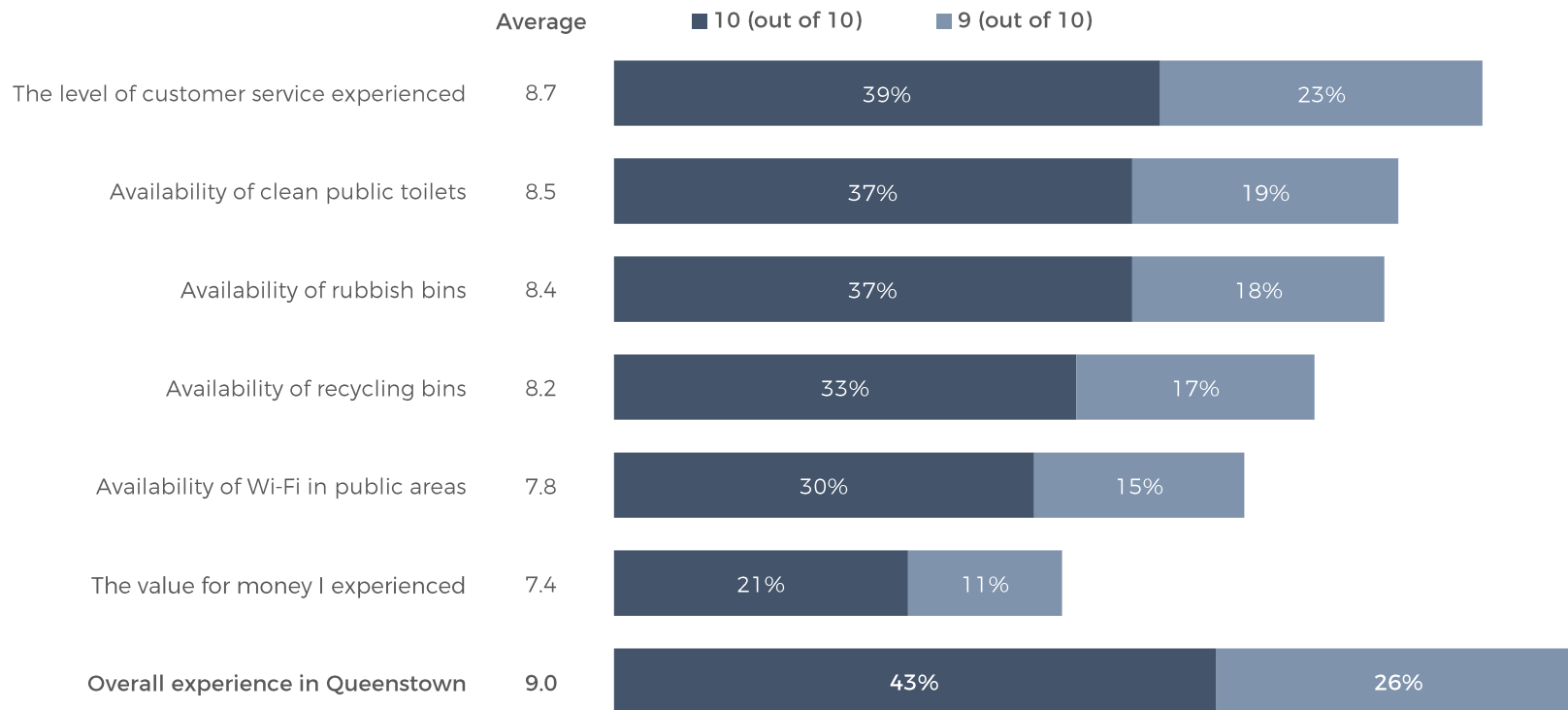


Cantabrians are less likely than other visitors to agree that they 'felt welcome in Queenstown' (8.3), that 'Queenstown's town centre/urban area is tidy' (8.2), that 'Queenstown is managing tourism activity well' (8.0), that 'it's easy to get around Queenstown' (7.9), and that 'it's easy to interact with local people in Queenstown' (7.8).



DESTINATION SATISFACTION

On a scale of 0 (not at all satisfied) to 10 (extremely satisfied), how satisfied are you with these aspects of your visit to Queenstown?



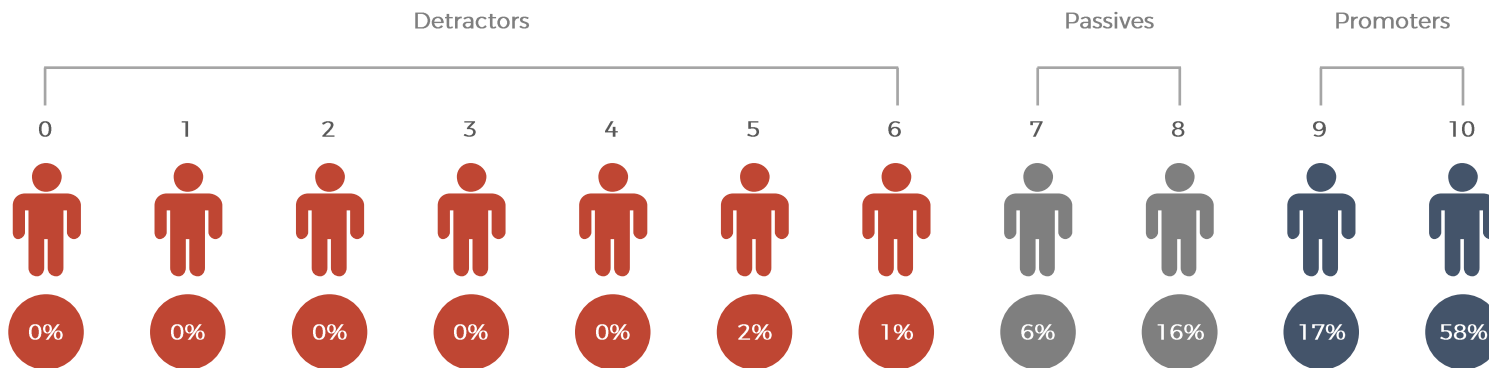
	Average	Not at all satisfied										Extremely Satisfied	N/A
		(0)	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	
Overall experience in Queenstown	9.0	0%	0%	0%	0%	0%	1%	2%	6%	21%	26%	43%	1%



NET PROMOTER SCORE (NPS)

How likely are you to recommend Queenstown as a visitor destination to other people?

Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and advocacy, based on the likelihood of a customer to recommend your product or service. Any positive score means that you have more loyal advocates willing to recommend your product or service (promoters) than unhappy critics (detractors). A passive customer is satisfied, but unenthusiastic. A high score of +100 means that every customer is a promoter, while a low score of -100 means that every customer is a detractor.



NPS is lower than average for

- Canterbury residents +52
- 65+ year olds +53
- Those who came to Queenstown in a private vehicle +62
- Those who stayed in Queenstown only 1-2 nights +62

NPS is higher than average for

- Residents from Bay of Plenty +82 and Waikato +78
- Those visiting at least partly due to Queenstown's 'reputation as a safe destination' +86
- Those who undertook a 'lake cruise and river activity' +83, or 'wellness experience' +83

NPS has increased from +70 in YE Sep 2021.
 NPS has increased from +67 in Q4 2020 to +70 in Q4 2021.
 NPS for New Zealand for YE Dec 2021 is +58.



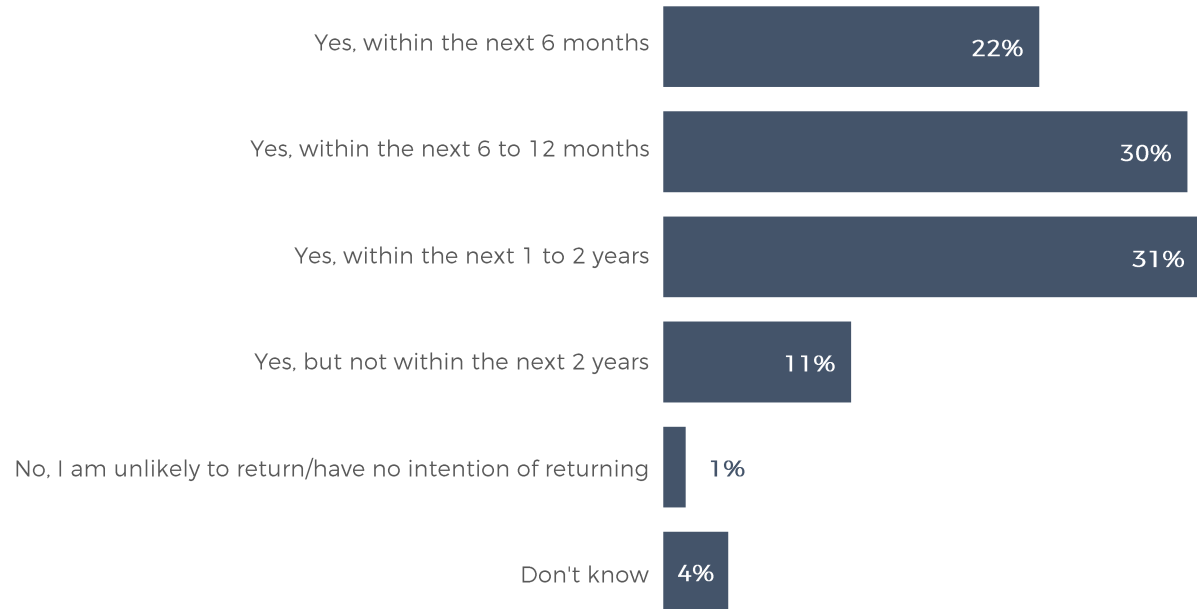


INTENTION TO RETURN

And do you think you will return to Queenstown in future? *



83% of visitors are
intending to return to
Queenstown in the next
two years





OPPORTUNITIES FOR IMPROVEMENT

What one main thing, if anything, could have improved your Queenstown experience?

Opportunities for Improvement	
Car parking	10%
Pricing	10%
Roadworks and traffic congestion	7%
Weather	3%
Having more time in Queenstown	2%
Provision of visitor information and signage	2%
Issues with booking experiences or cancellation	1%
Greater variety of shops, attractions and entertainment	1%
Bad service and unfriendly locals	1%
Presentation of Queenstown	1%
Rubbish & recycling facilities	1%
Base: Total Sample Jan 21 – Dec 21	n=620

“More tourists to bring back vibe & excitement”

“The overall cost of food and beverages was a bit steep - cheaper dining and grocery options would have been nice”

“Better parking. Too many streets blocked because of road works.”

“Lack of flexibility with prices when places aren't full in some circumstances”

“PARKING and roadworks ! like if you're doing roadworks, do little bits at once. As a tourist, it became very hard and confusing to get to locations we were trying to get to and not being able to find a carpark except in the Wilson underground carpark that is looking a little worse for wear.”

“Our hotel was understaffed at times, had to wait a long time for service even though it was almost empty.. 14 out of 150 rooms occupied!”

“Maps on display”

“More festivity especially for this time of the year”

“Combo deals for activities would be great or discounts for repeat business”

“Was a little tricky walking around central city with all the roadworks. Not a lot of low budget activities.”

“More indoor adventure activities for when the weather is not particularly pleasant”



HIGHLIGHTS

And what, if anything, are you enjoying, or did you enjoy most about your time in Queenstown?

Highlights	
Queenstown's natural environment and scenery	26%
Food and wine experiences	12%
Relaxing & quiet experiences	4%
Weather	4%
Atmosphere and vibe of Queenstown	4%
Variety of attractions and sites	4%
Walking and hiking	3%
Great service and friendly locals	3%
Ease of Accessibility (i.e. getting around)	3%
Spending time with family/friends	2%
Skyline Queenstown	2%
Skiing and snowboarding	2%
Wineries (& wine generally)	2%
Presentation of Queenstown (e.g. beautiful, clean)	1%
Cruising (e.g. lake cruise)	1%
Milford Sound and Doubtful Sound	1%
Cycling and biking	1%
Base: Total Sample Jan 21 – Dec 21	n=620

“Being able to walk around everywhere and enjoy the beautiful landscape”

“Just vibe and feeling. largely created by scenery but also well capitalised upon”

“New facilities & attractions”

“The variety of cuisine in the town's restaurants”

“Variety of restaurants and activities”

“I loooved the thrillseeker activities that aren't available near me! it definitely made me want to visit rather than just take in the amazing views”

“Family and the welcome from locals - they truly appreciate us being here”

“Scenery, friendly staff and was a more intimate time to be here because it's less busy”

“Just the chance to slow down!”

“Family deals to have an affordable day out”

“Enjoyed walking around all the green areas. Maybe advertising of all the short walks could be improved?”

“The fabulous mountain bike tracks, delicious selection of cafes and restaurants, great walking tracks”

“Gibbston Winery superb. Friendly and professional. Outstanding.”



SAMPLE PROFILE (NEW ZEALAND RESIDENTS)

Country of birth	
New Zealand	67%
Other country	33%
Region of residence	
Northland	1%
Auckland	30%
Waikato	10%
Bay of Plenty	9%
Gisborne	0%
Hawke's Bay	3%
Taranaki	1%
Manawatu-Whanganui	3%
Wellington (& Wairarapa)	19%
Tasman	1%
Nelson	2%
Marlborough	0%
West Coast	0%
Canterbury	13%
Otago	4%
Southland	3%
Base: Total Sample Jan 21 – Dec 21	n=620

Gender	
Male	48%
Female	52%
Gender Diverse	0%
Prefer not to say	0%
Age	
18-19 years	2%
20-24 years	9%
25-29 years	16%
30-34 years	13%
35-39 years	7%
40-44 years	11%
45-49 years	11%
50-54 years	11%
55-59 years	5%
60-64 years	7%
65-69 years	4%
70-74 years	4%
75+ years	1%
Base: Total Sample Jan 21 – Dec 21	n=620



In Q4 2021, Aucklanders made up just 18% of Queenstown's visitors (compared with 42% in Q4 2020). This is likely due to the regional lockdown in place at that time.

During this quarter a significantly higher proportion of Queenstown's visitors than previously were Wellington and Canterbury residents.

