

# VISITOR EXPERIENCE SURVEY RESULTS



Wānaka

YE December 2023



Wānaka

Queenstown  
NEW ZEALAND

**The Queenstown Lakes' Visitor Experience Survey is a collaboration between Lake Wānaka Tourism and Destination Queenstown which seeks to better understand visitor expectations, experiences and behaviours while in the region.**

DQ and LWT partner with respected industry researcher Angus & Associates to conduct the primary research. In July 2023 the survey was significantly redesigned to better align with the objectives of *Travel to a Thriving Future*, the Queenstown Lakes destination management plan.

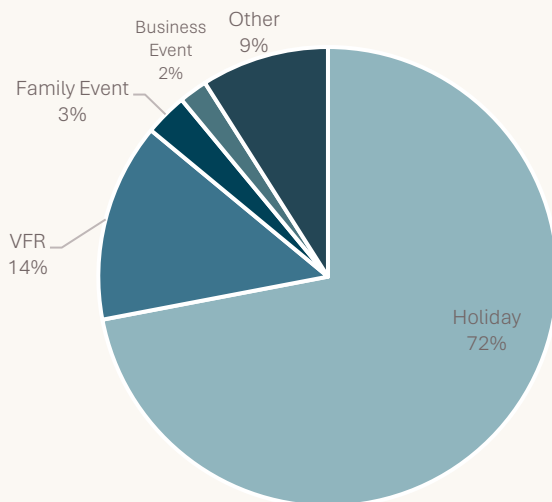
## METHODOLOGY

Respondents are recruited through an on the ground field programme and through online social campaigns. To qualify respondents must have been in the region for at least 1 night and be over the age of 18. At least 1000 response will be gathered each year, and the research can be split into the domestic and international visitor markets. Summary results are updated quarterly in the [visitor insights dashboard](#) and every six months a more detailed report (this document) is published. For further information about methodology please refer to the research methodology section.

# MOTIVATORS AND TRAVEL BEHAVIOURS

## PURPOSE OF TRAVEL

Approximately one in five domestic travellers visited Wānaka with the intention of reconnecting with friends or family, a proportion significantly higher than seen in Queenstown and particularly notable among travellers aged 50 and above.



## DESTINATION CONSIDERATIONS

Wānaka's stunning natural scenery is the main draw for international visitors and serves as a primary motivator for domestic visitors, along with seeking relaxation. For South Island residents in particular the ability to recharge and unwind is a significant factor influencing the decision to visit Wānaka. International visitors are more likely to be influenced by opportunities for discovery, adventure, tourism activities and by the region's reputation.

Natural environment	63%
Relaxation	53%
Sports and recreation	43%
Weather	40%
Food and beverage	36%
Discovery	28%
Adventure	27%
Reputation	25%
Tourism activities	22%
Safety	20%
Social connections	11%
Locals and their ways of life	9%
Low-impact/Convenient location	9%
History and culture	8%
Regenerative tourism	8%

# MOTIVATORS AND TRAVEL BEHAVIOURS

## TRANSPORTATION

The vast majority of visitors to Wānaka relied on their own transportation, whether a rented vehicle or privately owned, to explore the region.

### Transport around region

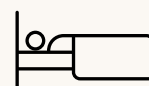
Rented vehicle (excluding campervans)	42%
Private vehicle (excluding campervans)	42%
Walking	39%
Bicycle	10%
Campervan/motorhome	10%
Taxi/Uber (or other ride sharing service)	7%
Shuttle	6%
Tour bus	2%
Ferry	2%

### Transport to region

Private vehicle	42%
Domestic flight	24%
Rented vehicle	23%
International flight	9%
Public bus/shuttle service	1%
Other transport	0%

## ACCOMMODATION

On average, domestic visitors stayed in Wānaka for four nights and international visitors stayed for three nights. A third of all domestic visitors and two thirds of international visitors also stayed overnight in Queenstown. One in four visitors to Wānaka stayed in a rented private home or holiday. Reflecting the high level of VFR travel, domestic visitors were more likely to stay in a private holiday home with no payment made, while international visitors were more inclined to stay in commercial accommodation.



# 4

Average nights stayed (median)

Private home (rented)	25%
Private home (no payment)	22%
Camping ground/holiday park	14%
Serviced apartment	9%
Hotel	8%
Motel	8%
Backpackers/hostel	4%
Freedom camping	3%
Luxury lodge	2%
B&B, Homestay or Farm stay	2%

# MOTIVATORS AND TRAVEL BEHAVIOURS

## DISPERSAL WITHIN REGION

Half of all domestic travellers and three quarters of international travellers to Wānaka also visited Queenstown (town centre). Domestic visitors were more likely to visit Cardrona and Luggate while in the region

Wanaka town centre	97%
Cardrona Valley	55%
Lake Hawea	47%
Other Wanaka urban area	36%
Glendhu Bay (and surrounds)	31%
Luggate	17%
Makarora (and surrounds)	12%
Queenstown (NET)	70%
Queenstown town centre	57%
Arrowtown	42%
Frankton	31%
Arthur's Point	14%
Gibbston Valley	13%
Glenorchy	12%
Other Queenstown urban area	12%
Lake Hayes	10%
Kingston	8%
Kelvin Heights/Kelvin Peninsula	3%

## ACTIVITIES/ EXPERIENCES

Dining out, walking/hiking/climbing, and shopping ranked as the top three most popular activities in Wānaka. International visitors were more inclined to go sightseeing (independently or on a tour) while in Wānaka compared to domestic visitors. Just over half of all visitors between July-September went skiing, or participated in other snow/ice activities, while in the region.

Restaurants and cafés	83%
Walking/ hiking	73%
Shopping	61%
Sightseeing	45%
Ski, snow, ice activities	36%
Bars/nightclubs	28%
Cycling/biking	27%
Wineries or other wine experiences	25%
Lake cruising and river activities	24%
Art, museums, historic buildings	19%
Wellness experiences	11%
Land activities	10%
Cultural or heritage experiences	9%
Community event/giving back	9%
Flying/air activities	7%
Adrenaline activities	7%
Farm, animal or nature experience	5%

# EXPERIENTIAL MEASURES

## DESTINATION VALUES

Wānaka visitors felt welcomed in the region and felt a sense of connection with the natural environment, with an average agreement scale rating of 8.3 (out of 10) on both measures. While domestic visitors also strongly expressed these sentiments, they were notably higher among international visitors. Areas for focus include increasing opportunities for visitors to engage in sustainable travel practices, immerse themselves in the local culture and heritage, and facilitate meaningful exchanges where they can share knowledge and reciprocate in a meaningful manner.

	Rank out of 10
I felt welcome	8.3
I felt a sense of connection with the natural environment in the area	8.3
My visit included meaningful experiences/meaningful connections	7.3
I felt that locals care/cared about my wellbeing	7.1
There were opportunities for me to learn about the local culture and heritage	6.2
I felt empowered to travel in a sustainable way	6.1
I was able to share my knowledge/ reciprocate meaningfully in some way	5.9

## FOUR PILLARS OF WELLBEING

When considering the four strategic pillars, the strongest support from visitors is evident for the region's environmental care, while the pillars with the most room for growth, especially for domestic visitors, are those concerning the region's commitment to its community and to its culture and heritage.



8.0

Cares about its local environment



7.4

Cares about the health of its economy



7.5

Cares about its culture and heritage



7.8

Cares about the people in its community

# EXPERIENTIAL MEASURES

## INTERACTION/ EXPERIENCE OF REGENERATIVE/ SUSTAINABLE OFFERINGS

There is an opportunity to educate visitors about regenerative tourism and the Queenstown/Wānaka region’s commitment to it. While a quarter of all visitors expressed satisfaction with the sustainable or regenerative offerings available, a larger segment was unsure if the services or products they engaged with were sustainable or regenerative. International visitors were more likely to express satisfaction with the sustainable or regenerative offerings available, compared with domestic visitors.

I specifically looked for sustainable/ regenerative tourism offerings	8%
I found it easy to find out which tourism offerings were sustainable/ regenerative	17%
I wanted to purchase more sustainable/ regenerative tourism offerings	10%
I don't know if the tourism offerings I purchased/ consumed were sustainable/ regenerative	35%
It was important to me that the tourism offerings I purchased/ consumed were sustainable/ regenerative	15%
I chose a tourism offering over others because of their efforts to be sustainable/ regenerative	9%
I was satisfied with the sustainable/ regenerative tourism offerings available	27%
I actively sought ways to positively contribute to the community or environment during my stay	15%

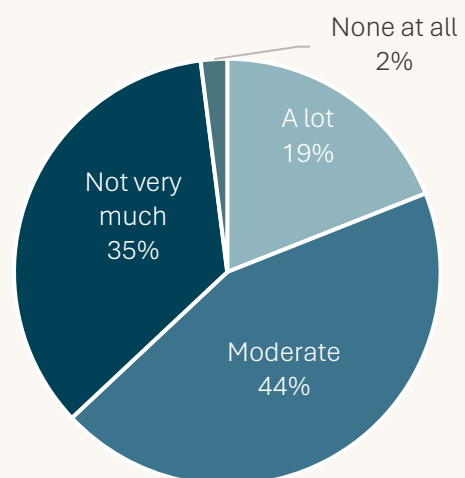
## VISIT LEGACY

When reflecting on the impact of their visit, international visitors are notably more inclined than domestic visitors to believe they explored local attractions more extensively than other visitors and to agree that they shared certain aspects of their culture with local people.

I think I explored the local area more than others	36%
I think I stayed longer than most other visitors	26%
I got to know and connected with a range of locals	24%
I took time to care for or restore the natural environment in some way	12%
I shared some aspects of my culture with local people	10%
I shared my knowledge with local people	9%
Other	4%
None of the above	29%

## INTERACTION WITH LOCALS

Domestic visitors are more likely to agree that they got to know and connected with a range of local people.



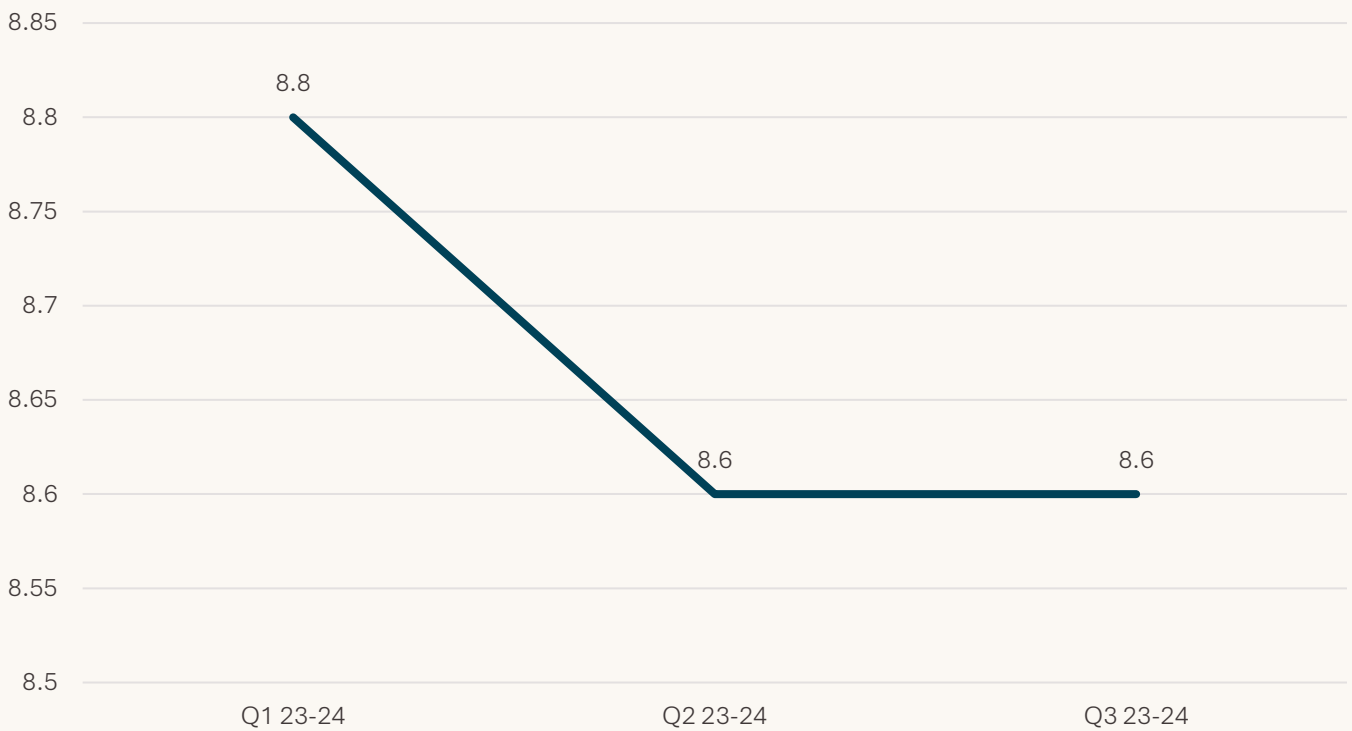
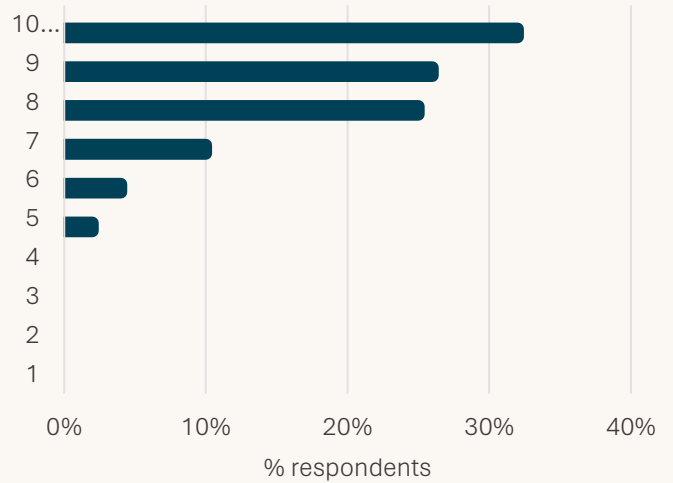
# SATISFACTION MEASURES

# 8.6

Overall visitor experience satisfaction

## OVERALL SATISFACTION

Visitors to Wānaka express high satisfaction with their experience in the region. On average, domestic visitors rate their experience at 8.5 (out of 10), while international visitors rate it higher at 8.9 (out of 10). Overall satisfaction scores are notably higher among Australian visitors (9.1).

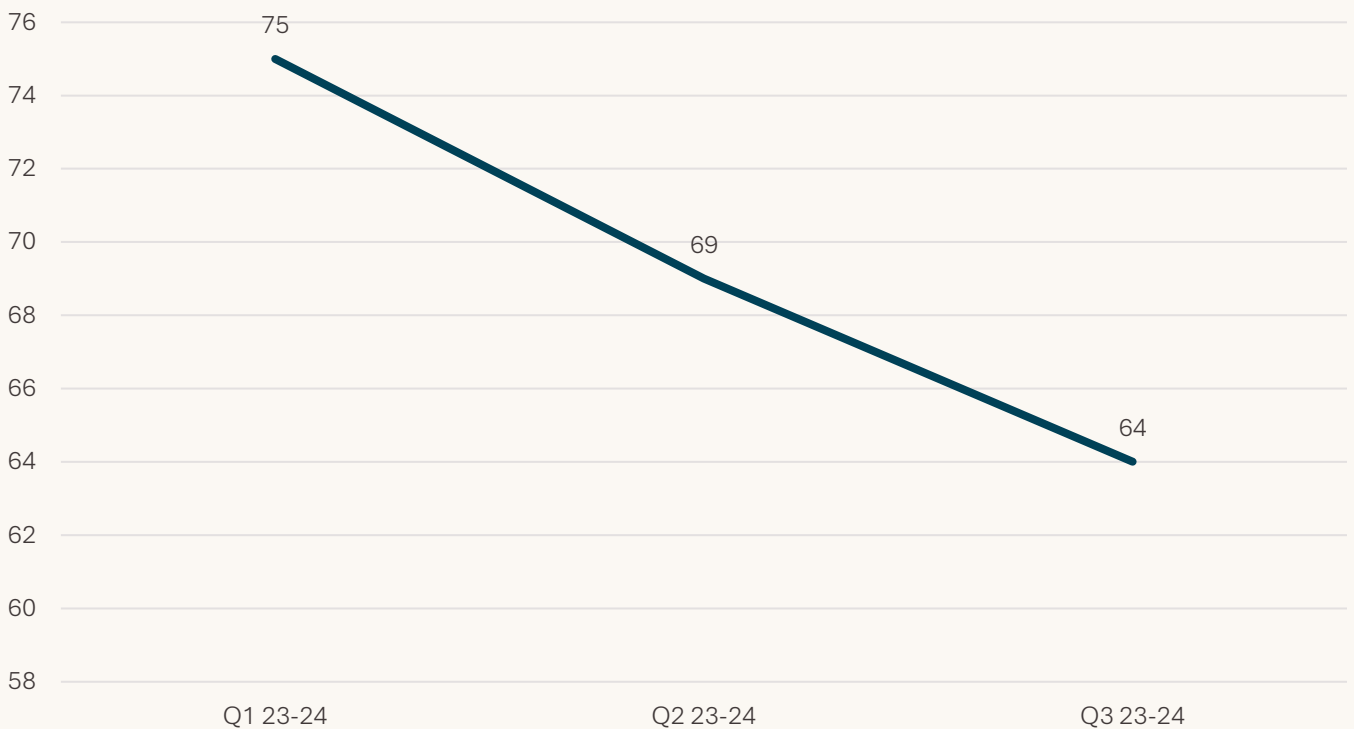
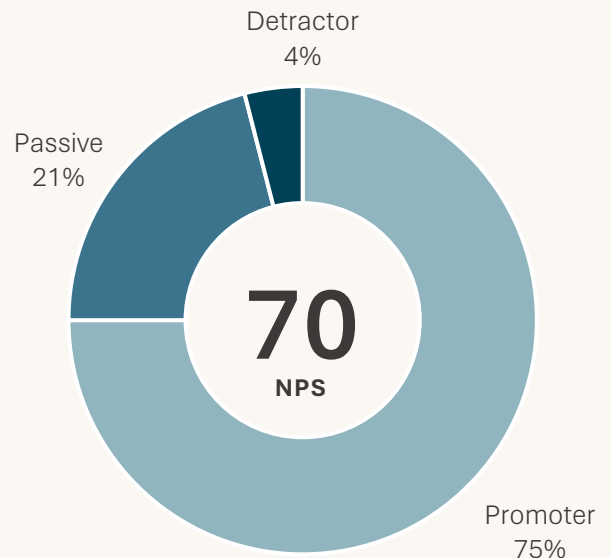


Source: Queenstown Lakes Visitor Experience Survey, Destination Queenstown and Lake Wānaka Tourism, conducted by Angus & Associates.  
Time period: 1 July 2023 – 31 December 2023. Base: Wānaka Visitors – total sample (n=258). While sample size is building results are to be treated as indicative.

# SATISFACTION MEASURES

## NET PROMOTER SCORE

Wānaka showcases a commendable Net Promoter Score (NPS) of +70, indicating a strong advocacy for the region as a destination. International visitors exhibit an even higher NPS of +81 compared to domestic visitors at +64.





# SATISFACTION MEASURES

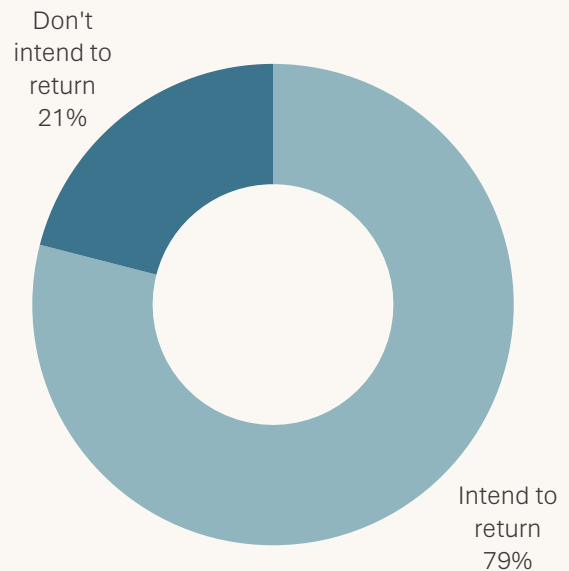
## AREAS FOR IMPROVEMENT

Two areas identified for improvement are the ease of using public transport and the accessibility of parking in the region. These concerns are mirrored in satisfaction ratings and in feedback indicating that enhancing parking availability, traffic flow, and public transport alternatives are pivotal areas for improvement. One in ten domestic visitors expressed concerns about the cost of visiting the region, a concern less prominent among international visitors.

Improve parking (availability)	14%
Improve traffic flow/traffic management/road access	11%
Reduce cost of visiting (accommodation, food, activities)	9%
Improve public transport	7%
Limit roadworks and construction	4%
Address overcrowding	4%
Address environmental issues	4%

## INTENTION TO RETURN

Looking ahead, four out of five domestic visitors and one in five international visitors express intentions to return to the region within the next 12 months. Over all 79% intend to return in the next two years.



# RESEARCH METHODOLOGY

## METHODOLOGY

At least 1,000 visitors to the Queenstown-Lakes District will participate in the research over the course of a year (n=500 New Zealanders and n=500 international visitors: n=500 overnight visitors to Queenstown and n=500 overnight visitors to Wānaka).

Visitors are recruited to participate in the survey via two channels:

- In-Region Intercept: Angus & Associates recruit survey participants in the Queenstown Lakes region and by approaching visitors at designated locations. Visitors can choose to complete the survey on their own device, by email, or on a tablet provided. This approach ensures a representative sample of visitors.
- Digital Campaigns/e-newsletters: A link to the online survey is shared by DQ and LWT through social media channels and e-newsletters to target recent visitors.

To qualify to participate, respondents must be 18+ years of age, live outside of the Queenstown Lakes District, and have stayed overnight in the Queenstown or Wānaka regions within the past three months.

Following extraction, quality control and cleaning procedures, the survey data is weighted to better reflect the actual proportions of domestic and international visitors to the Queenstown and Wānaka regions (see opposite).

To incentivise participation, visitors who complete the survey are offered entry into a quarterly prize draw to win their choice of either a Lasting Legacy Pack (five native trees planted in the Queenstown/Wānaka area on their behalf with Trees that Count and a \$150 donation made in their name to Love Queenstown/Love Wānaka), or a selection of organic wines from Amisfield, shipped to their door.

The online survey is programmed and administered by Angus & Associates' affiliate company. Get Smart. The average (median) survey length is 10 minutes.

## SURVEY RESPONDENT SOURCE

Digital Campaign	9%
Destination e-newsletter	50%
On-Site Field Staff	40%
Other	1%
<b>Queenstown Visitor Sample</b>	<b>N = 258</b>

## DATA WEIGHTING

	Dom.	Int.
Actual Visitors	144	114
	56%	44%
Weighted Visitors	155	103
	60%	40%
Weighting Factor	1.08	0.09

For further questions about the visitor experience survey please [reach out](#).

# VISITOR PROFILE

## DEMOGRAPHIC PROFILE

### AGE

18-19 years	0%
20-29 years	13%
30-39 years	17%
40-49 years	16%
50-59 years	26%
60-69 years	19%
70-79 years	8%

### GENDER

Male	49%
Female	51%
Gender Diverse	0%

### PRIOR VISITS TO THE REGION

This is (or was) my first visit	19%
I have visited once before, or a few times	24%
I have visited many times	51%
I used to live in the Queenstown region	5%



