

# VISITOR EXPERIENCE SURVEY RESULTS



Wānaka

YE June 2024



**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.

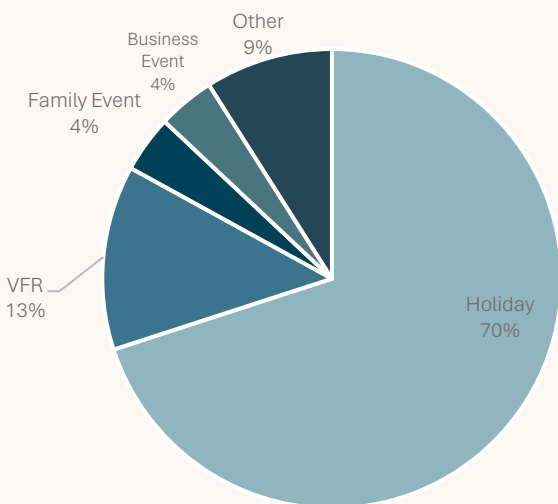
## **METHODOLOGY**

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

Almost one in five domestic travellers visited Wānaka to reconnect with friends or family. This proportion is significantly higher than in Queenstown and particularly notable among travellers aged 50 and older, especially those aged 70 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, tourism activities, adventure, and by the region's reputation.

Natural environment	60%
Relaxation	49%
Sports and recreation	35%
Food and beverage	35%
Weather	34%
Discovery	31%
Adventure	28%
Tourism activities	27%
Reputation	25%
Safety	17%
Social connections	12%
History and culture	11%
Locals and their ways of life	9%
Low-impact/Convenient location	7%
Regenerative tourism	6%

# 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

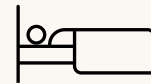
Rented vehicle (excluding campervans)	39%
Private vehicle (excluding campervans)	41%
Walking	35%
Bicycle	9%
Campervan/motorhome	12%
Taxi/Uber (or other ride sharing service)	5%
Shuttle	4%
Tour bus	3%

### Transport to region

Private vehicle	42%
Domestic flight	26%
Rented vehicle	20%
International flight	9%
Public bus/shuttle service	2%
Other transport	1%

## ACCOMMODATION

On average, domestic visitors stayed in Wānaka for four nights and international visitors stayed for three nights. One third of all domestic visitors and almost two thirds of international visitors also stayed overnight in Queenstown. One in four visitors to Wānaka stayed in a rented private home or holiday home (e.g., through Airbnb, Bachcare, Holiday Houses, or similar businesses). Reflecting the high level of VFR travel (Visiting Friends and Relatives), domestic visitors were more likely to stay in a private holiday home with no payment made (i.e., with local family or friends), while international visitors were more inclined to stay in commercial accommodation (e.g., hotel, motels or camping grounds/holiday parks).



# 4

Average nights stayed (median)

Private home (rented)	23%
Private home (no payment)	21%
Camping ground/holiday park	15%
Hotel	10%
Serviced apartment	8%
Motel	8%
Backpackers/hostel	5%
Freedom camping	4%
Luxury lodge	2%
B&B, Homestay or Farm stay	2%
Other	4%

# MOTIVATORS AND TRAVEL BEHAVIOURS

## DISPERSAL WITHIN REGION

Almost 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 and international visitors were more likely to visit Hāwea and Makarora.

Wanaka town centre	96%
Lake Hawea	48%
Cardrona Valley	44%
Other Wanaka urban area	34%
Glendhu Bay (and surrounds)	28%
Luggate	16%
Makarora (and surrounds)	15%
Queenstown (NET)	70%
Queenstown town centre	58%
Arrowtown	40%
Frankton	26%
Glenorchy	14%
Gibbston Valley	11%
Other Queenstown urban area	11%
Lake Hayes	11%
Arthur's Point	10%
Kingston	8%
Kelvin Heights/Kelvin Peninsula	3%

## ACTIVITIES/ EXPERIENCES

Dining out, walking/hiking/climbing, shopping, and sightseeing (independently or on a tour) ranked as the most popular activities in Wānaka. International visitors were more inclined to go walking/ hiking/ climbing and sightseeing while in Wānaka compared to domestic visitors.

Restaurants and cafés	81%
Walking/ hiking	72%
Shopping	60%
Sightseeing	48%
Bars/nightclubs	26%
Cycling/biking	26%
Lake cruising and river activities	25%
Wineries or other wine experiences	22%
Ski, snow, ice activities	20%
Art, museums, historic buildings	19%
Wellness experiences	10%
Cultural or heritage experiences	10%
Flying/air activities	9%
Adrenaline activities	9%
Community event/giving back	8%
Land activities	7%
Farm, animal or nature experience	6%

# 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 8.2 (out of 10) on both measures. All sentiments were significantly stronger among international visitors compared with domestic visitors. Areas of opportunity include facilitating meaningful exchanges where visitors can share knowledge and reciprocate in a meaningful manner, empowering meaningful travel in sustainable ways, and increasing opportunities for travellers to immerse themselves in the local culture and heritage.

	Rank out of 10
I felt welcome	8.2
I felt a sense of connection with the natural environment in the area	8.2
My visit included meaningful experiences/meaningful connections	7.2
I felt that locals care/cared about my wellbeing	6.9
There were opportunities for me to learn about the local culture and heritage	6.3
I felt empowered to travel in a sustainable way	6.0
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 improvement, 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



7.7

Cares about the health of its economy



7.5

Cares about its culture and heritage



7.4

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 third of visitors were 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 and the ease of finding out which offerings were sustainable or regenerative, compared with domestic visitors.

I don't know if the tourism offerings I purchased/ consumed were sustainable/ regenerative	32%
I was satisfied with the sustainable/ regenerative tourism offerings available	26%
It was important to me that the tourism offerings I purchased/ consumed were sustainable/ regenerative	17%
I found it easy to find out which tourism offerings were sustainable/ regenerative	16%
I actively sought ways to positively contribute to the community or environment during my stay	13%
I wanted to purchase more sustainable/ regenerative tourism offerings	10%
I chose a tourism offering over others because of their efforts to be sustainable/ regenerative	8%
I specifically looked for sustainable/ regenerative tourism offerings	6%

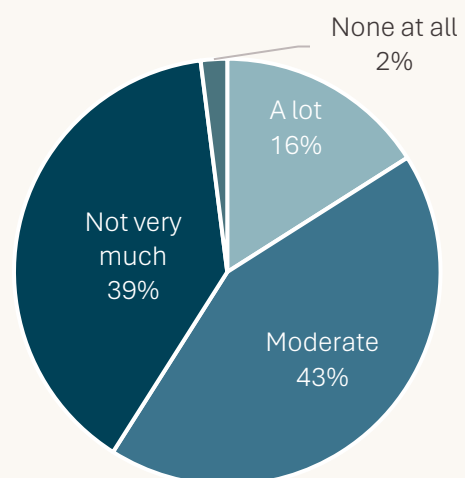
## VISIT LEGACY

When reflecting on the impact of their visit, international visitors were 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	33%
I think I stayed longer than most other visitors	24%
I got to know and connected with a range of locals	21%
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	10%
Other	3%
None of the above	32%

## INTERACTION WITH LOCALS

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



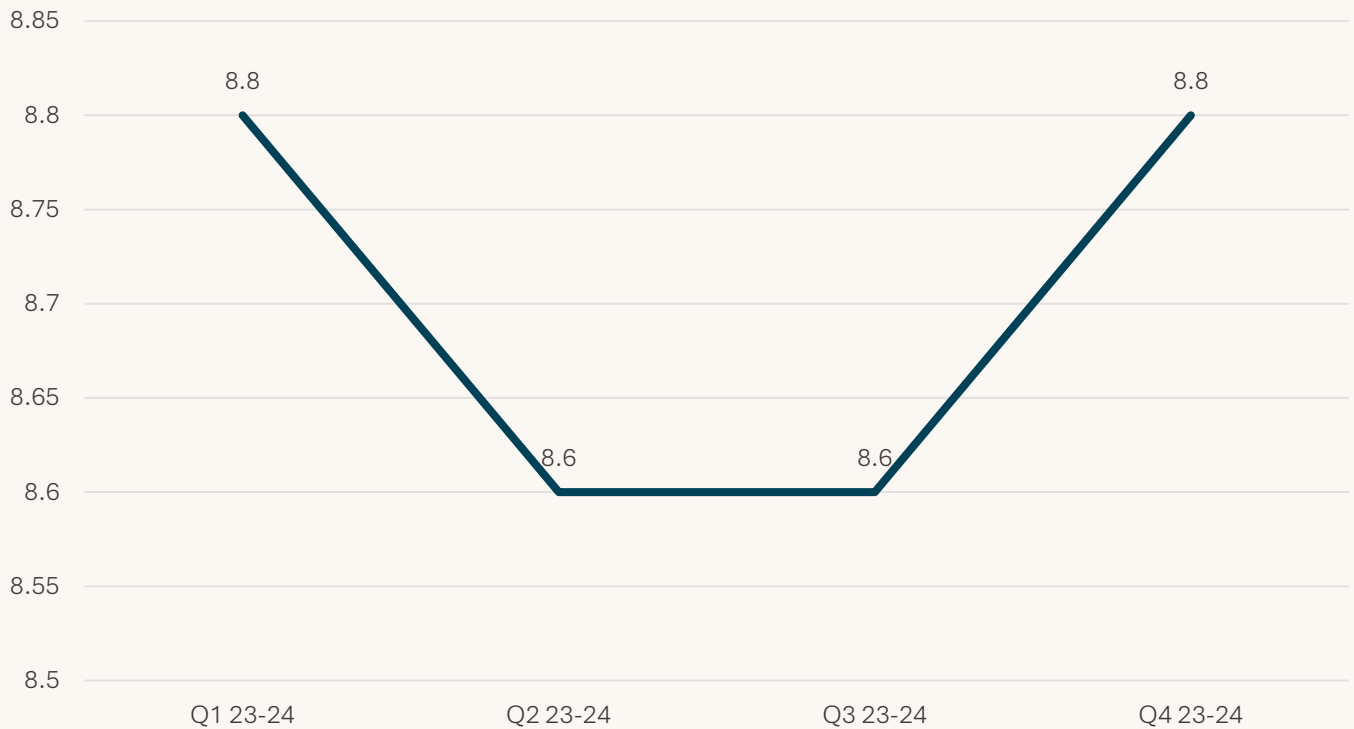
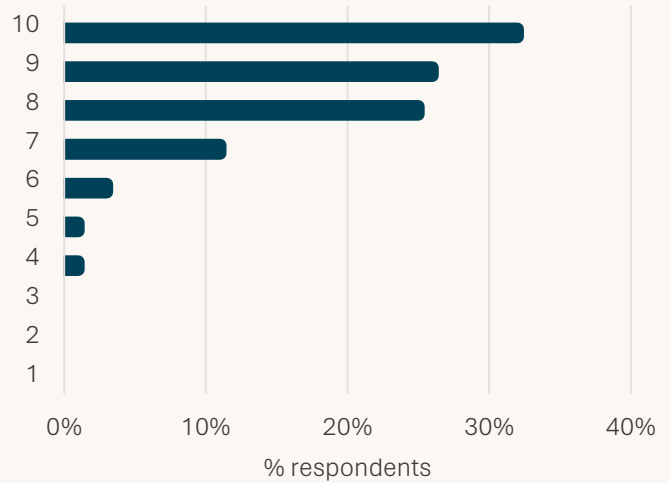
# SATISFACTION MEASURES

# 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 (9.0), younger visitors aged 18-29 years (8.9), and visitors that stayed at least five nights in the region (8.8).



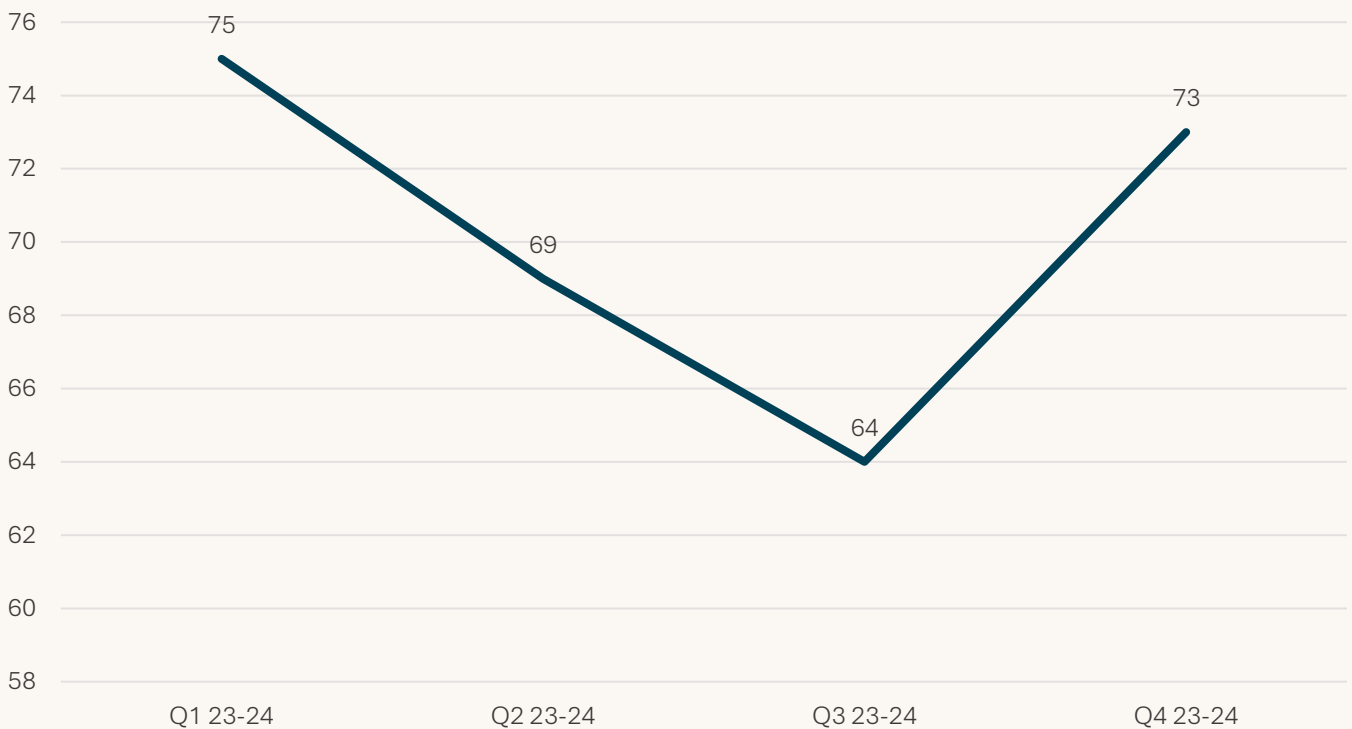
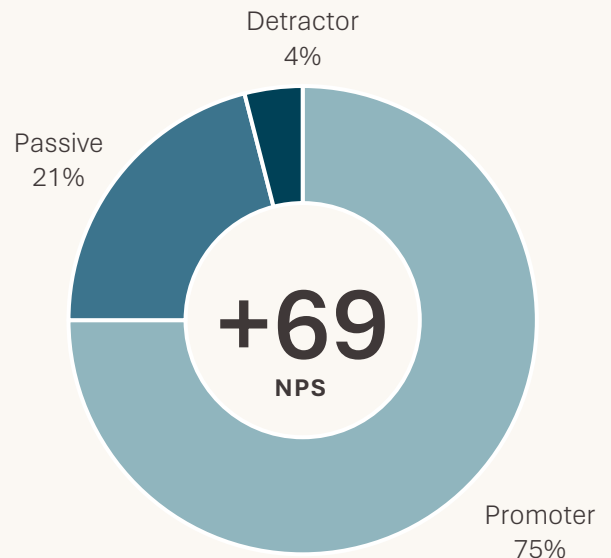
Source: Queenstown Lakes Visitor Experience Survey, Destination Queenstown and Lake Wānaka Tourism, conducted by Angus & Associates.  
Time period: 1 July 2023 – 30 June 2024. Base: Wānaka Visitors – total sample (n=500).



# SATISFACTION MEASURES

## NET PROMOTER SCORE

Wānaka showcases a commendable Net Promoter Score (NPS) of +69, indicating a strong advocacy for the region as a destination. International visitors exhibit an even higher NPS of +77 compared to domestic visitors at +63.





# SATISFACTION MEASURES

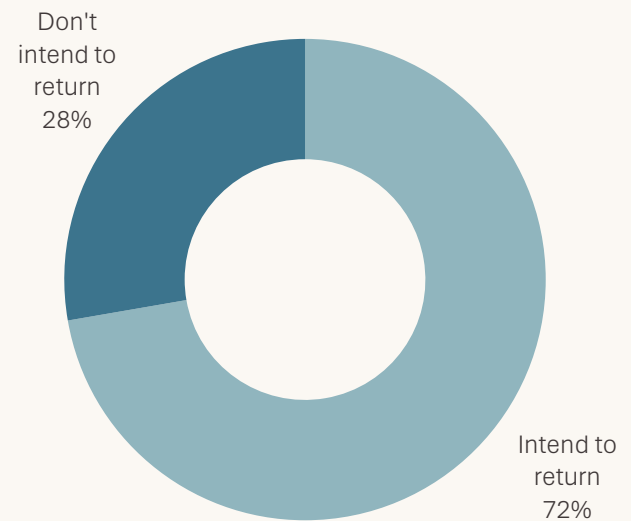
## AREAS FOR IMPROVEMENT

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)	11%
Improve traffic flow/traffic management/road access	10%
Reduce cost of visiting (accommodation, food, activities)	9%
Improve public transport	5%
Limit roadworks and construction	4%
Address overcrowding	4%
Address environmental issues	3%

## INTENTION TO RETURN

Looking ahead, most domestic visitors (90%) and almost one in two international visitors (45%) express intentions to return to the region within 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	7%
Destination e-newsletter	31%
On-Site Field Staff	56%
Other	6%
<b>Queenstown Visitor Sample</b>	<b>N = 500</b>

## DATA WEIGHTING

	Dom.	Int.
Actual Visitors	252	248
	50%	50%
Weighted Visitors	303	198
	60%	40%
<b>Weighting Factor</b>	<b>1.2</b>	<b>0.8</b>

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

# VISITOR PROFILE

## DEMOGRAPHIC PROFILE

### AGE

18-19 years	1%
20-29 years	15%
30-39 years	16%
40-49 years	13%
50-59 years	23%
60-69 years	22%
70-79 years	10%

### GENDER

Male	51%
Female	48%
Gender Diverse	1%

### PRIOR VISITS TO THE REGION

This is (or was) my first visit	25%
I have visited once before, or a few times	24%
I have visited many times	47%
I used to live in the Queenstown region	4%

