

# QUEENSTOWN VISITOR SURVEY

2021/22 – Quarter 3 Update  
YE March 2022

# SUMMARY - YEAR ENDING MARCH 2022



## VISIT MOTIVATORS

86% of domestic visitors to Queenstown are travelling for a holiday or short break. This proportion appears to be decreasing from its peak of 91% in the year ending June 2021. Just over a third of domestic visitors base their Queenstown trip around one specific attraction or experience – most commonly skiing/snowboarding, Milford Sound and Skyline Queenstown.

While domestic visitors most commonly want to experience outstanding natural landscapes in Queenstown, a third want to experience adventure, challenge, or excitement. By region of residence, Aucklanders appear more likely to want to visit a must-see destination that people talk about and to indulge in comfort and be pampered than other domestic visitors.

The most commonly cited factors influencing the decision to visit include Queenstown's natural environment/scenery, tourism activities/experiences, abundance of outdoor activities/experiences and food and beverage options.

## TRAVEL BEHAVIOUR

Domestic visitors to Queenstown are likely to be travelling with their partner/spouse (69%), and 45% travel as a couple with no other companions. One in ten are travelling with friends only.

Almost everyone visits the Queenstown town centre, and 80% visit locations outside of the town centre/Frankton area. Almost two thirds include another destination on their itinerary – most commonly Wānaka (39%) and Milford Sound (24%).

68% of domestic visitors to Queenstown travel directly from their region of residence, including six percent from the wider Otago region. Three in four stay in Queenstown for three nights or more, and one in four are on their first visit to the region.

# SUMMARY - YEAR ENDING MARCH 2022



When choosing accommodation, price and the location/proximity to the town centre are the most common deciding factors. Two in five domestic visitors stay in a hotel, and 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. One in five visitors participate in an adrenaline activity.

Two in five domestic 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. An area that clearly causes dissatisfaction is ease of parking vehicles, however quarterly results suggest satisfaction is improving over time.

Queenstown is also well perceived as a destination that's safe, welcoming, and that doesn't have anti-social behaviour (all rate an average of 8.6 or above, out of ten).

Domestic visitors rate their overall experience in Queenstown, an average of 8.9 out of ten. Enthusiasm towards the destination is also reflected in a high Net Promoter Score (NPS). At +69 it is 14 points higher than the NPS for New Zealand as a whole. Further, more than 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 impact on international visitor numbers). 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 an 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 April 2021 – March 2022. As the sample grows further analysis will be possible, including identification of 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	86%
Visit family or friends	3%
For other business reasons	3%
To attend an event held by friends or family	2%
To attend an event held by someone else	1%
To make a transport connection/just passing through on way to somewhere else	1%
To attend a conference, convention, or other business event	1%
For education/study	1%
Other	2%
Base: Total Sample Apr 21 – Mar 22	n=625

→ **36%**

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

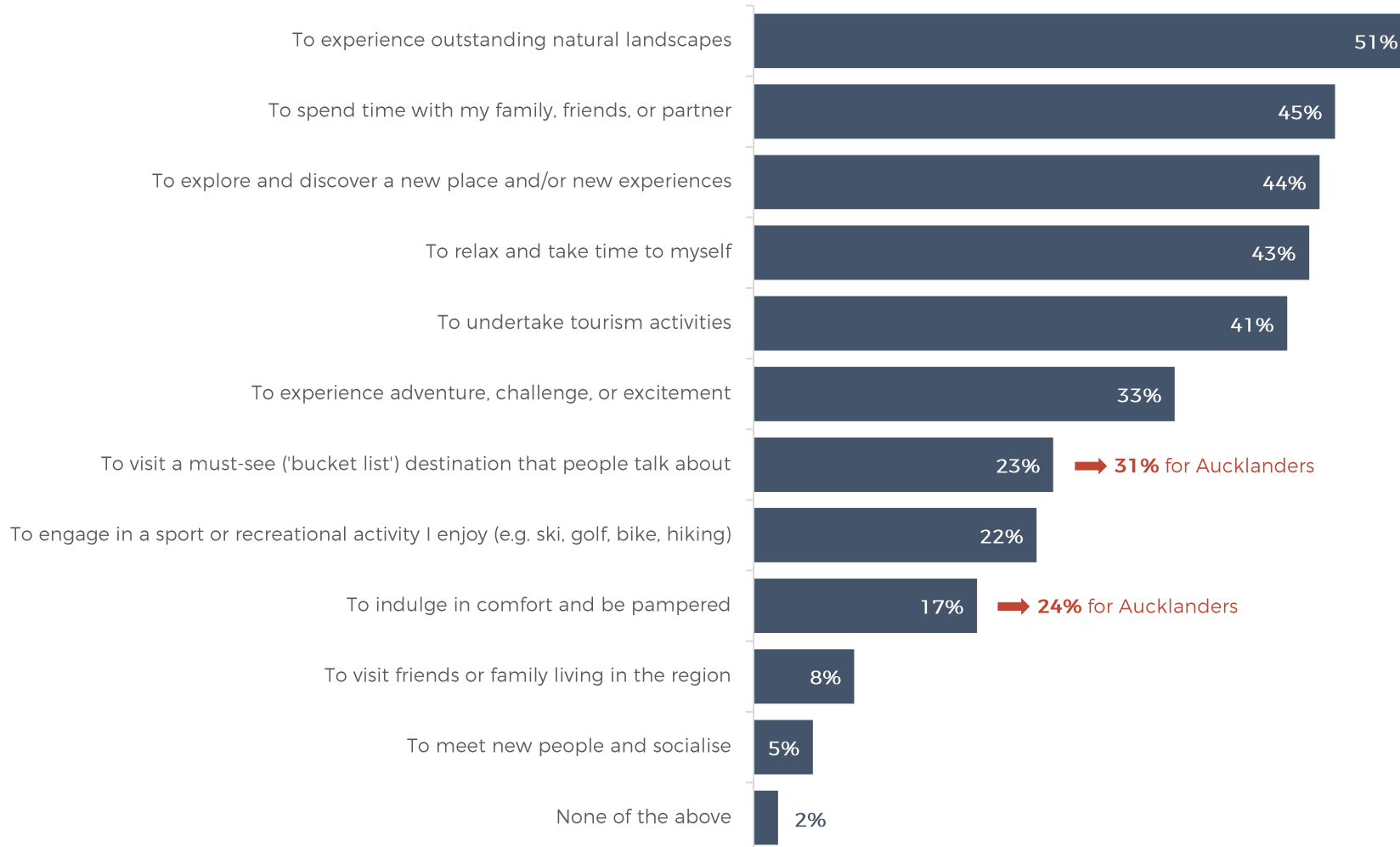


In Q1 2022, 33% of holiday visitors based their visit to Queenstown around one specific attraction or experience. The most mentioned 'driver' attractions/experiences in Q1 2022 were biking (including mountain biking), Milford Sound and the Skyline Gondola.

# VISIT MOTIVATORS



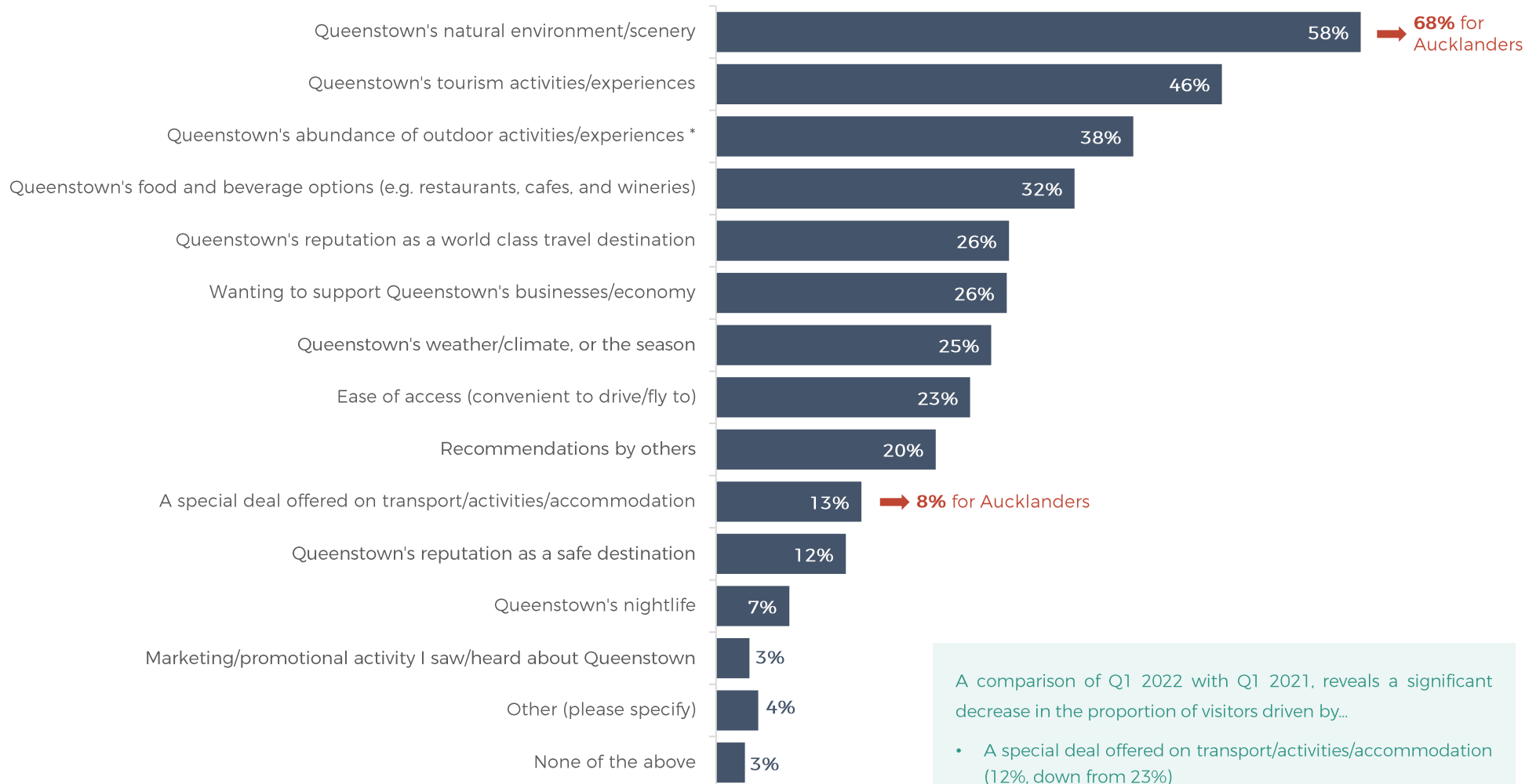
And which, if any, of the following do/did you want from your visit to Queenstown?



# DESTINATION DECISION DRIVERS



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



A comparison of Q1 2022 with Q1 2021, reveals a significant decrease in the proportion of visitors driven by...

- A special deal offered on transport/activities/accommodation (12%, down from 23%)

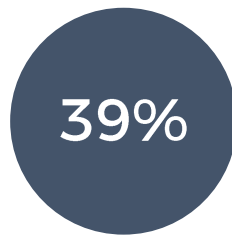
# DESTINATION EXPERIENCE



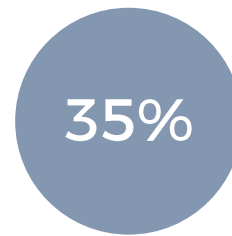
How many times have you visited Queenstown?



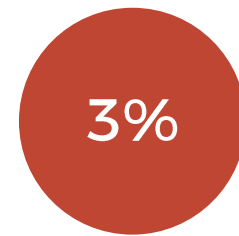
**First visit**  
to Queenstown



**Visited**  
**once/few times**



**Visited**  
**many times**



**Used to live**  
in Queenstown



In Q1 2022, 38% of visitors had visited many times before. By comparison, this proportion was 27% in Q1 2021.

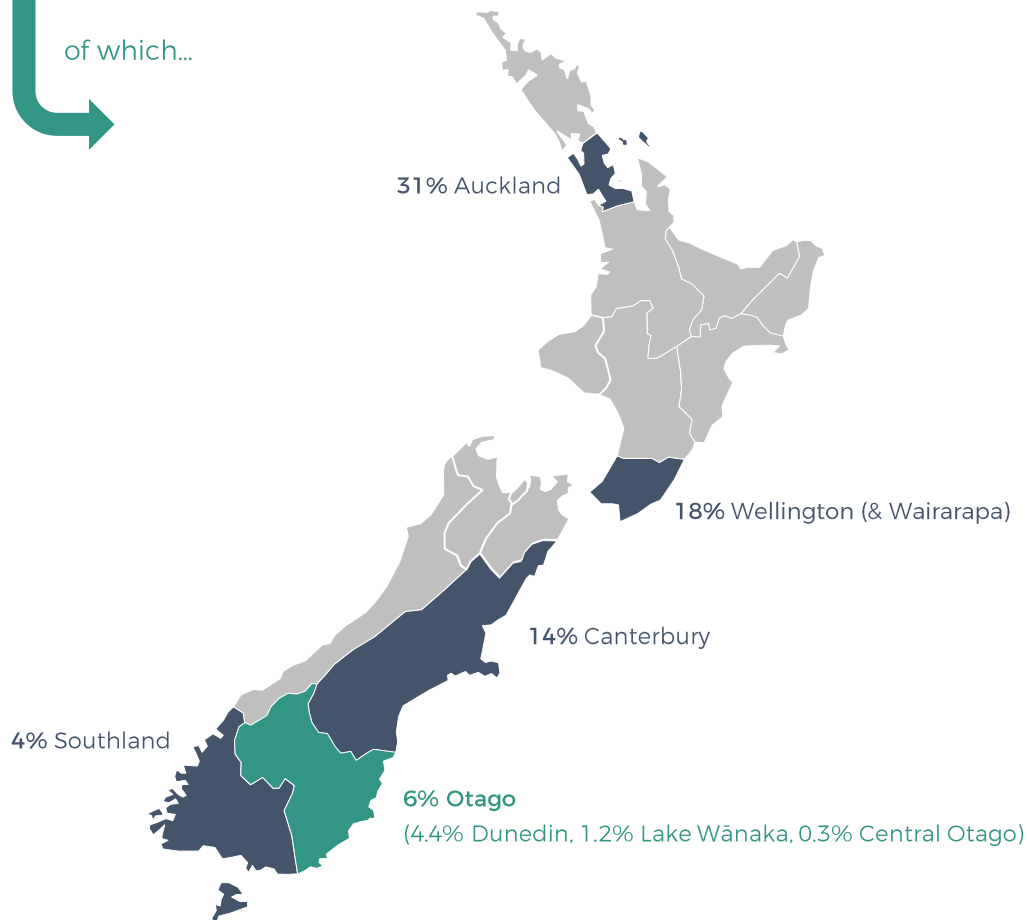


On your current (or most recent) trip to Queenstown, what location/region did you last stay overnight in before arriving in Queenstown? \*

## 68% of visitors travelled to Queenstown directly from their region of residence



of which...



Of the 32% of visitors not travelling to Queenstown directly from their region of residence, the last locations stayed in overnight before arriving in Queenstown are most commonly...

Wellington (& Wairarapa) 18%, Auckland 16%, Canterbury 13%, Bay of Plenty 11%, Waikato 11%

### Location last stayed overnight before Queenstown (top 10 overall)

Auckland	24%
Wellington	14%
Christchurch	10%
Southland	8%
Canterbury (excl. Christchurch)	6%
Bay of Plenty (excl. Rotorua)	5%
Dunedin	5%
Lake Wānaka	4%
Hamilton/Waikato (excl. Taupō & The Coromandel)	4%
Hawke's Bay	2%

Base: Total Sample Jul 21 – Mar 22

n=474

# 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?

Dispersal within Queenstown region	
Queenstown town centre	90%
Frankton <sup>1</sup>	50%
Arrowtown	57%
Cardrona	25%
Glenorchy	23%
Lake Hayes	22%
Gibbston Valley	18%
Arthur's Point <sup>2</sup>	12%
Kelvin Heights/Kelvin Peninsula	10%
Kingston	9%
Other Queenstown urban area <sup>2</sup>	9%
Other	8%
Base: Total Sample Apr 21 – Mar 22 n=625	

Aucklanders are more likely than other visitors to visit Arrowtown (65%), Glenorchy (31%) and Gibbston Valley (26%), while Cantabrians are less likely than other visitors to visit Arrowtown (36%), Cardrona (10%), Lakes Hayes (11%) and Gibbston Valley (9%).

Other regions visited	
None – Queenstown region only	37%
Wānaka	39%
Milford Sound	24%
Canterbury (including Christchurch)	16%
Other location(s) in Otago outside of Queenstown and Wānaka (incl. Dunedin)	15%
Other location(s) in Fiordland outside of Milford Sound (incl. Te Anau)	15%
Southland (including Invercargill)	10%
West Coast	9%
Other South Island region(s)	11%
North Island region(s)	5%
Base: Total Sample Apr 21 – Mar 22 n=625	

20%

Only visit the town centre/Frankton area

(14% AKL, 20% WLG, 33% CAN residents)

37%

Only visit the Queenstown region

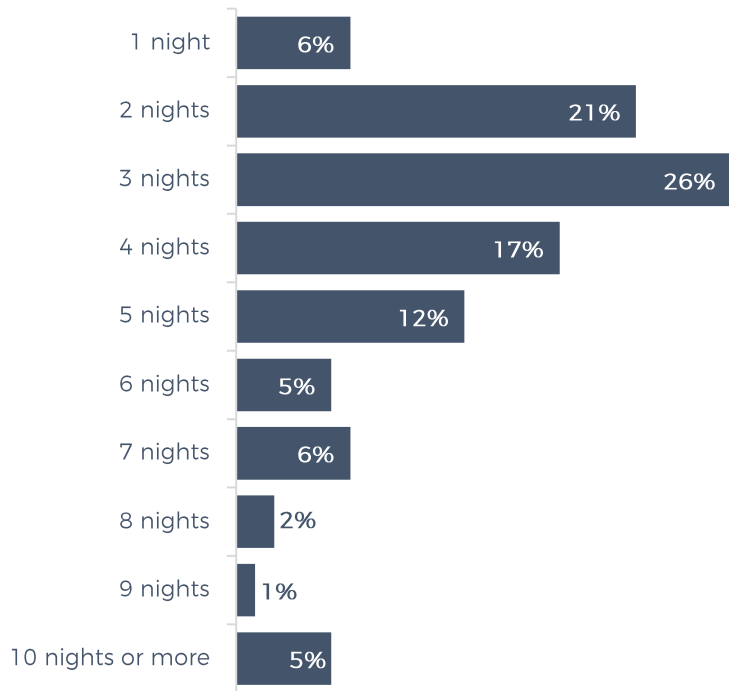
(37% AKL, 37% WLG, 40% CAN residents)

# 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?

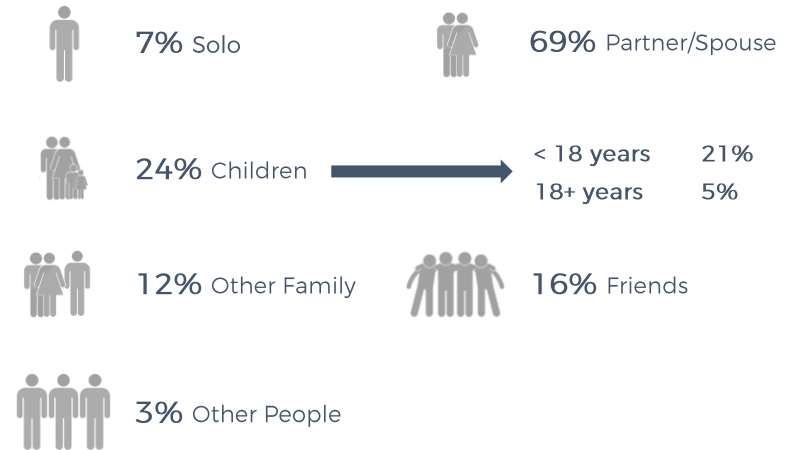
## Length of Stay



**The median length of stay is 3 nights**

(4 nights for: Auckland and Waikato residents, 65+ year olds, those who travelled to Queenstown on a domestic flight and those who stayed in a private residence - rented or without payment.)

## Travel Party



### Group types



- 7% Travelling alone
- 45% Couples only
- 74% Family groups (incl. couples) only \*
- 21% Family groups with children only \*\*
- 9% Friends only

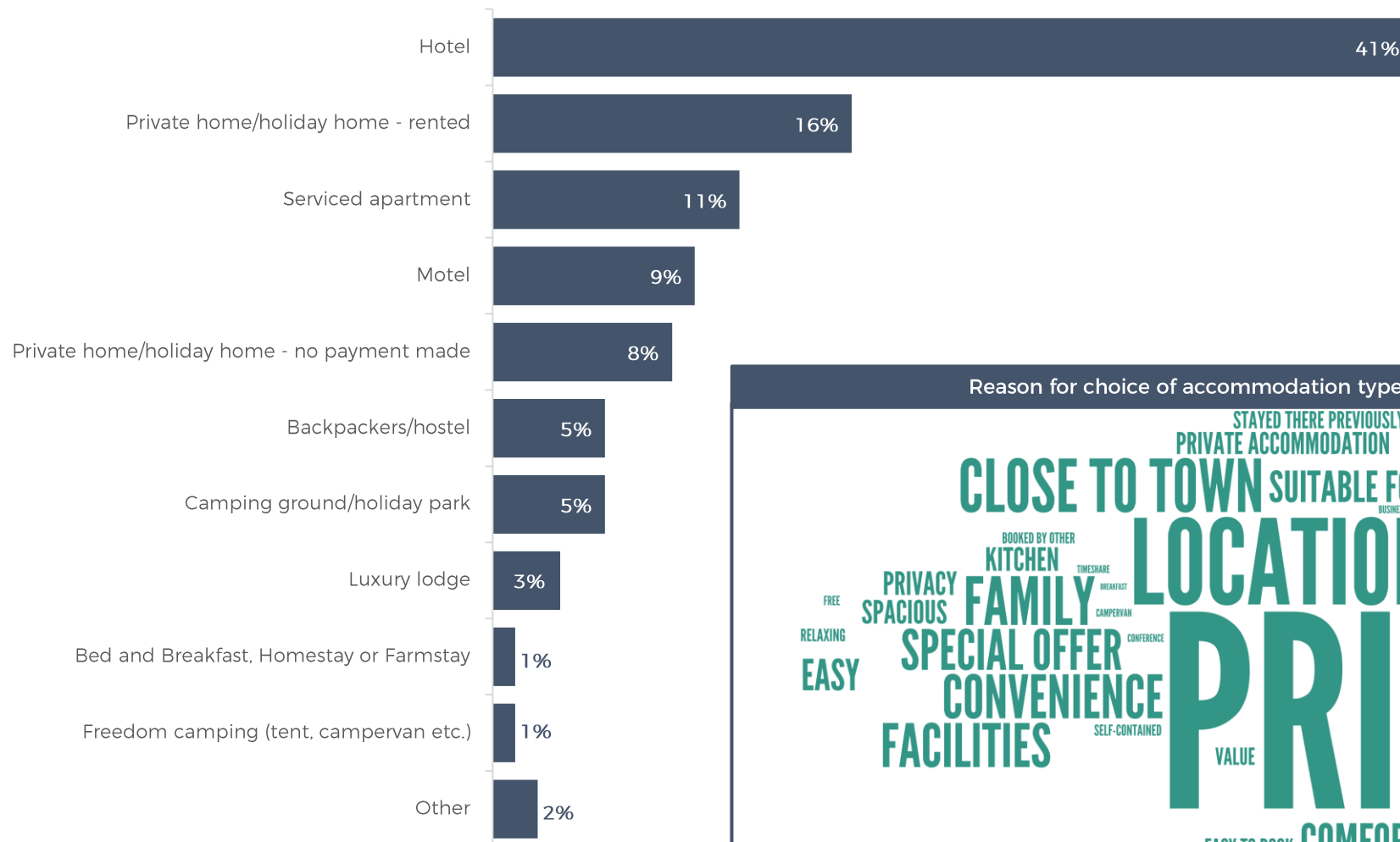
\* Respondent travelled with any of their partner/spouse, children of any age and/or other family members but no others

\*\* Respondent travelled with their child/children (of any age) and no others apart from partner/spouse and/or other family members where applicable

# ACCOMMODATION



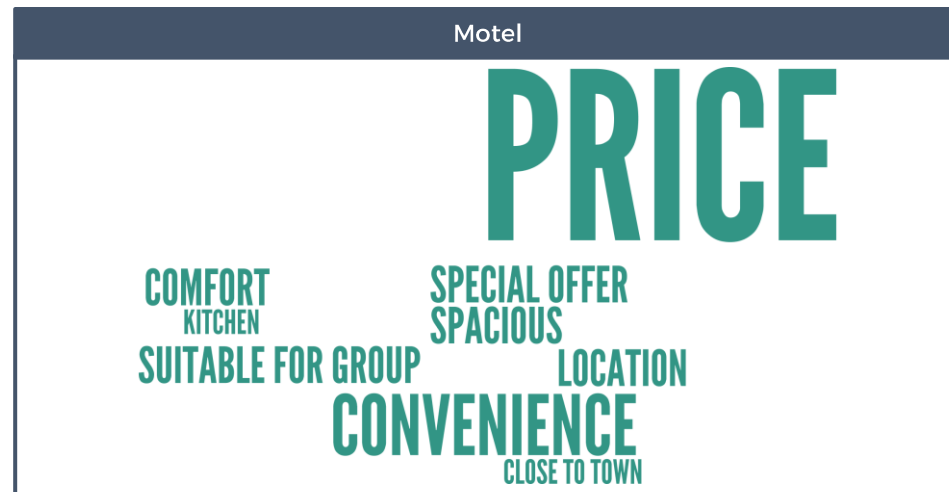
What is/was the main type of accommodation you used on this trip to Queenstown?  
 What was the main reason you chose this type of accommodation?



# ACCOMMODATION CONT.



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

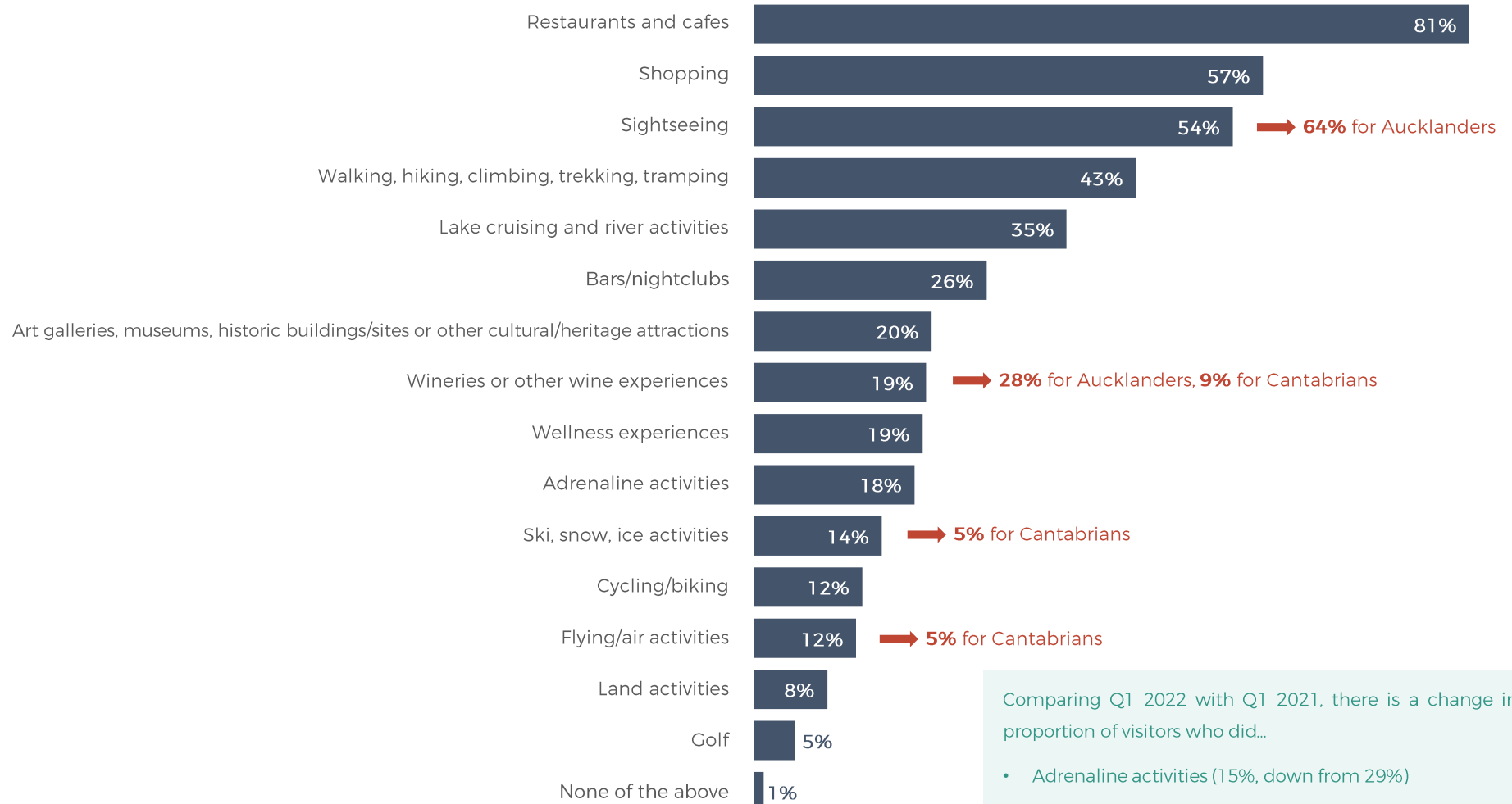




# ACTIVITIES/EXPERIENCES



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



Comparing Q1 2022 with Q1 2021, there is a change in the proportion of visitors who did...

- Adrenaline activities (15%, down from 29%)
- Ski, snow, ice activities (6%, up from 1%)

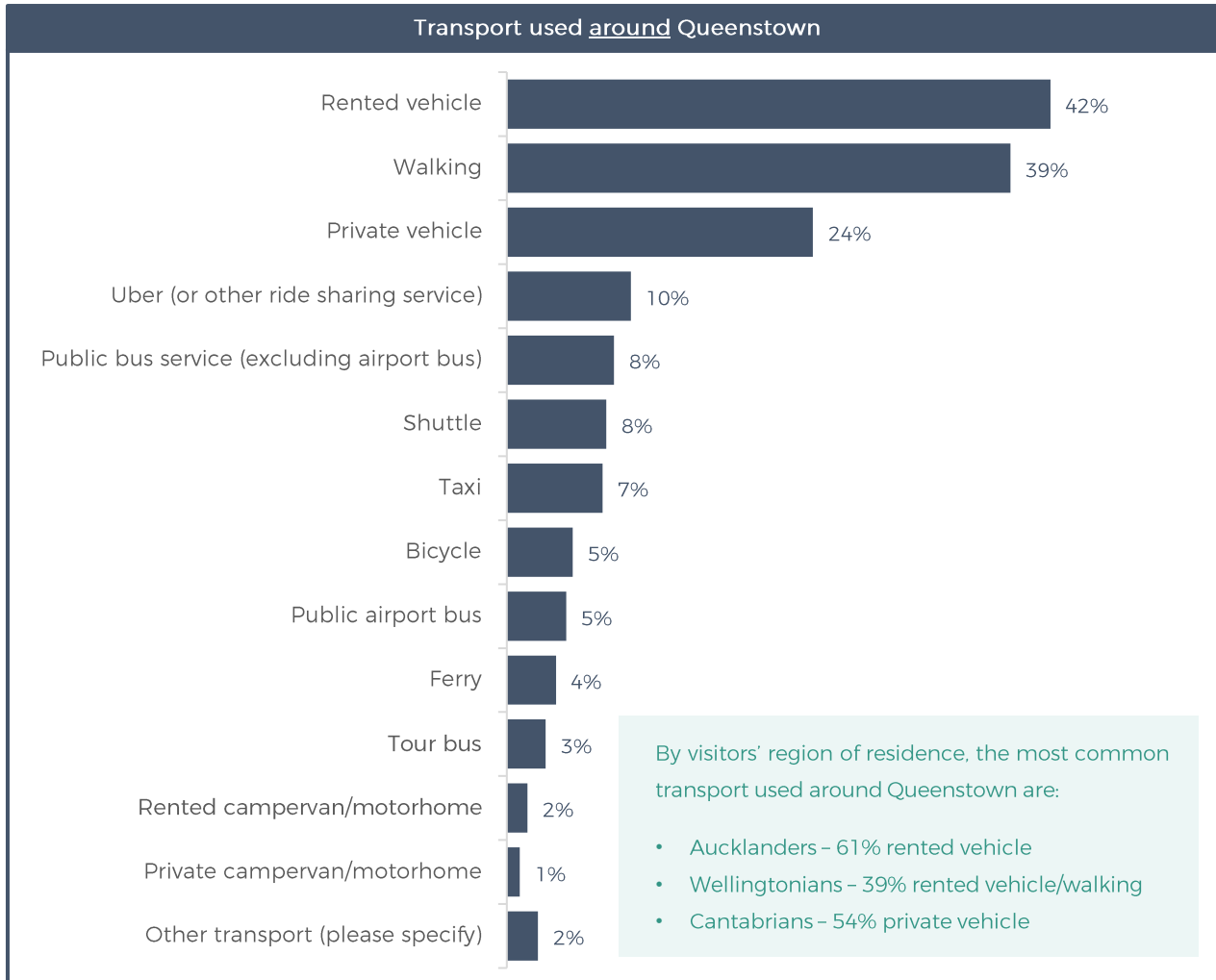
# TRANSPORT



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	63%
Private vehicle	25%
Rented vehicle	10%
Scheduled bus/shuttle service	1%
Other transport	1%

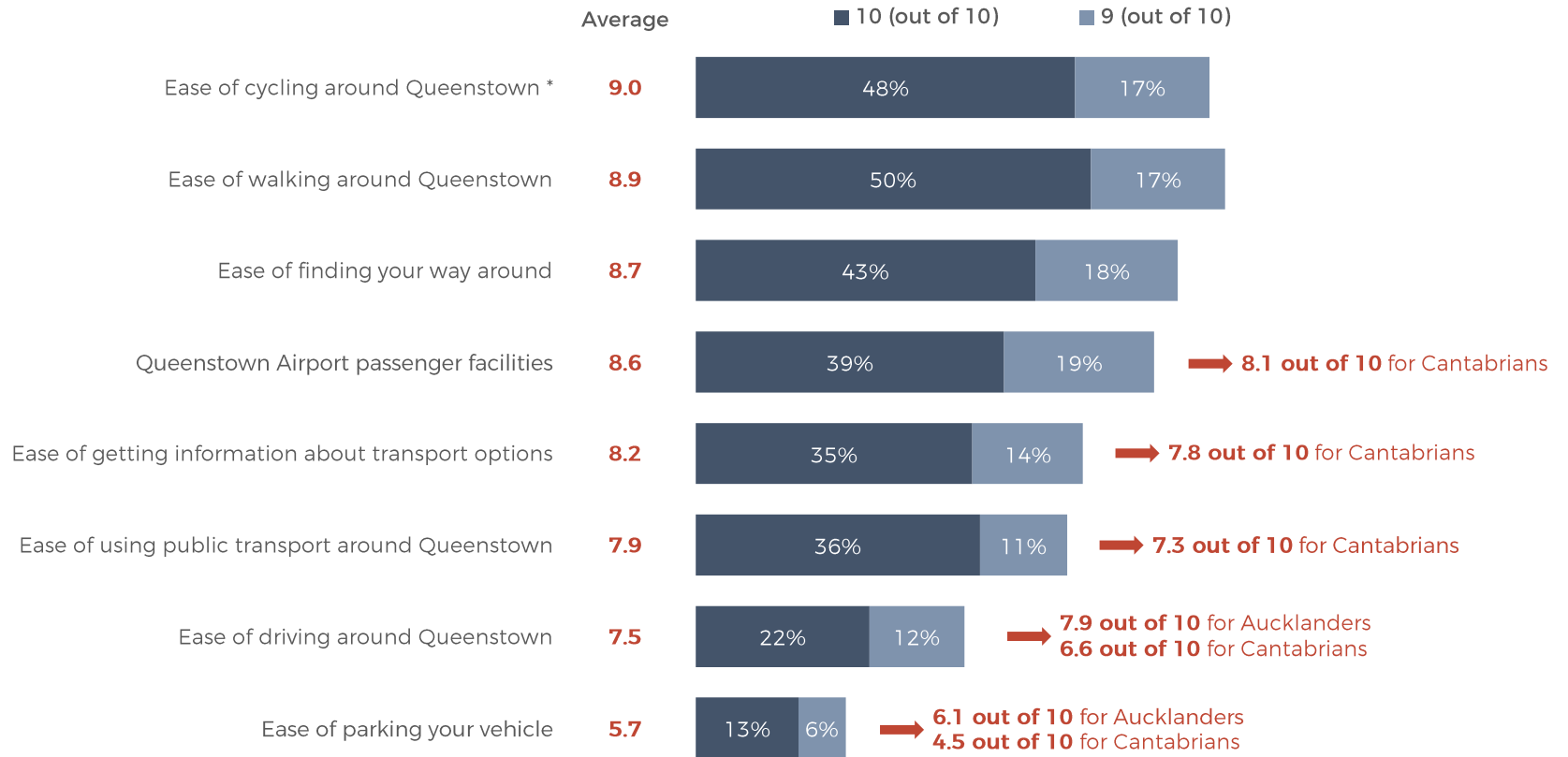
79% of Aucklanders, 76% of Wellingtonians and 22% of Cantabrians travelled to Queenstown on a domestic flight.



# 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)

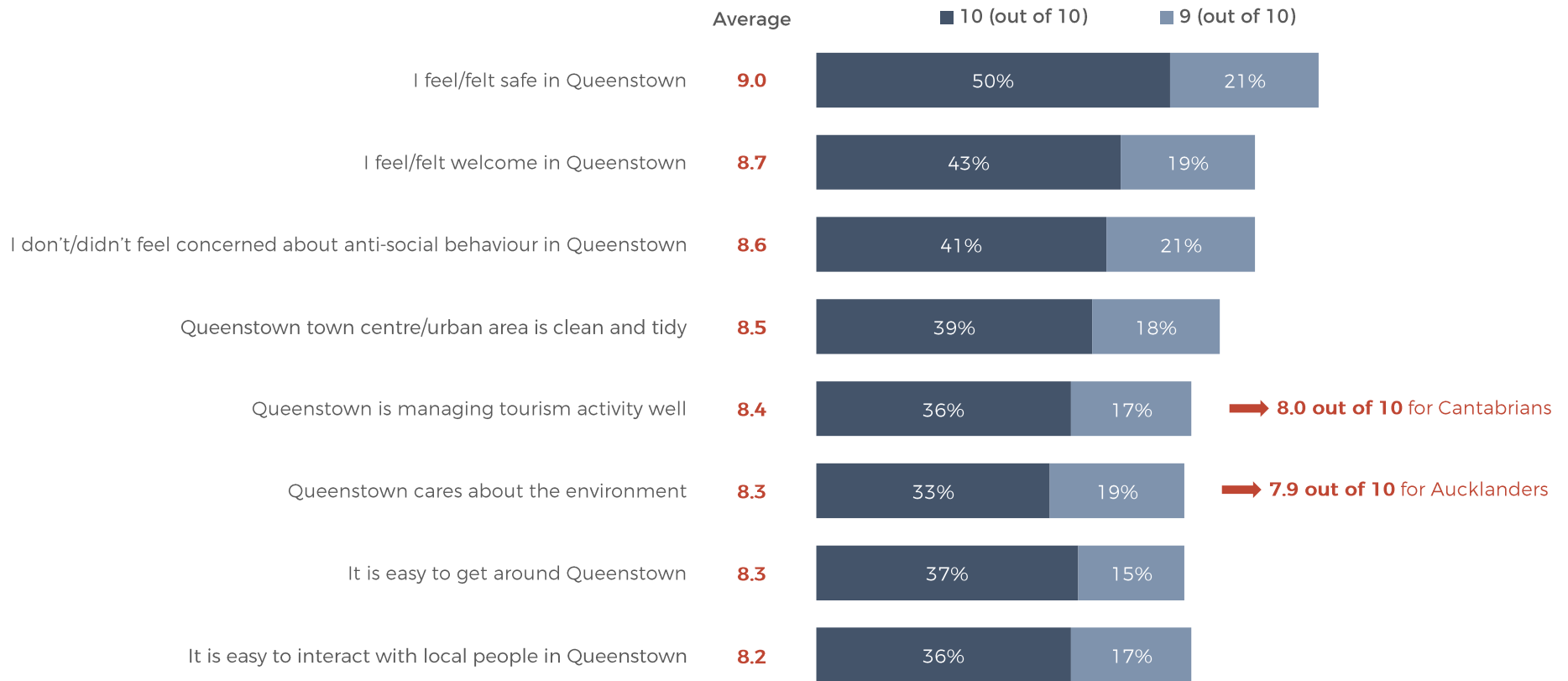


In Q1 2022, domestic visitors rated 'ease of parking your vehicle' at an average of 6.2 (out of 10), the highest rate of satisfaction since reporting began. This metric which is a pressure point for Queenstown appears to be steadily improving, following its low of 5.2 (out of 10) in Q2 2021.

# 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]

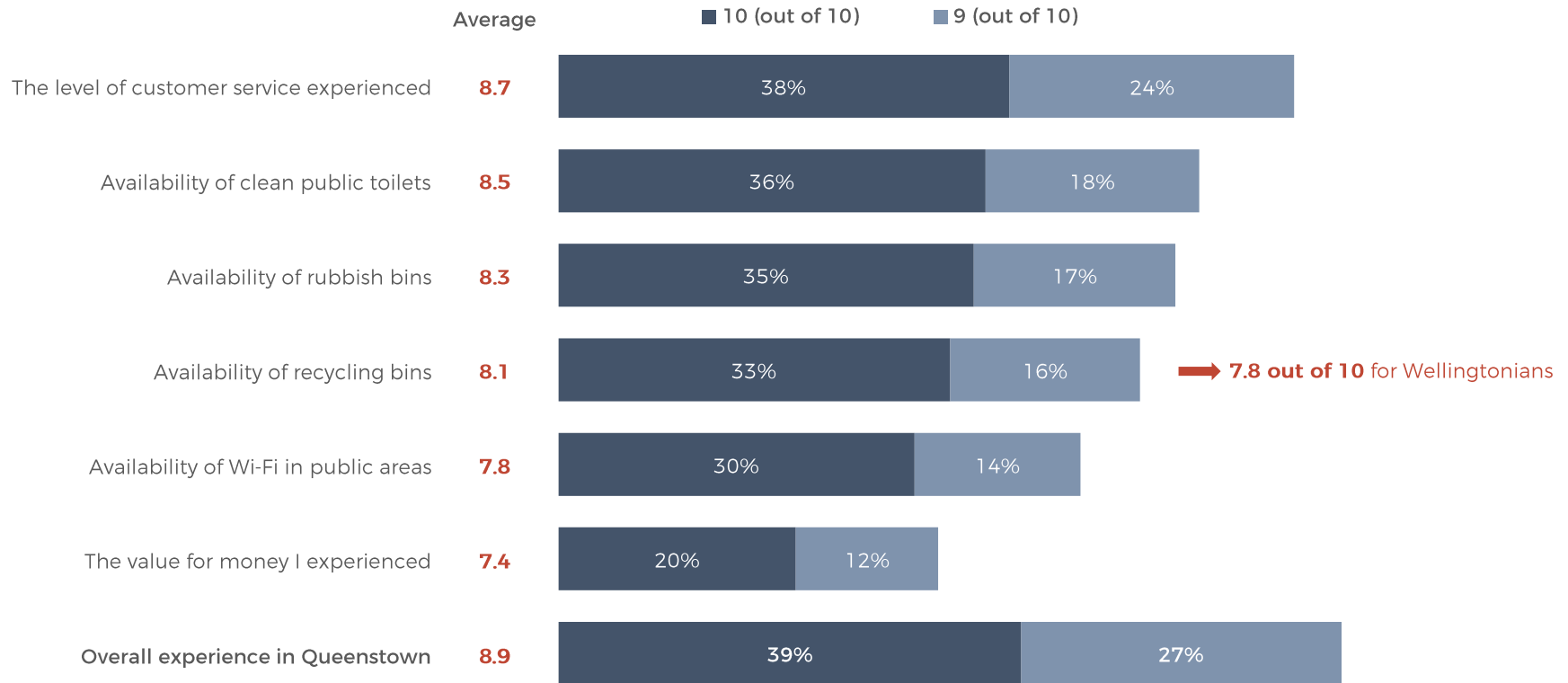


Those who are visiting Queenstown for the first time are more likely to agree that 'Queenstown is managing tourism activity well' at 8.8 (out of 10), and that 'it is easy to get around Queenstown' at 8.7 (out of 10).

# 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	8.9	0%	0%	0%	0%	0%	1%	3%	7%	22%	27%	39%		1%

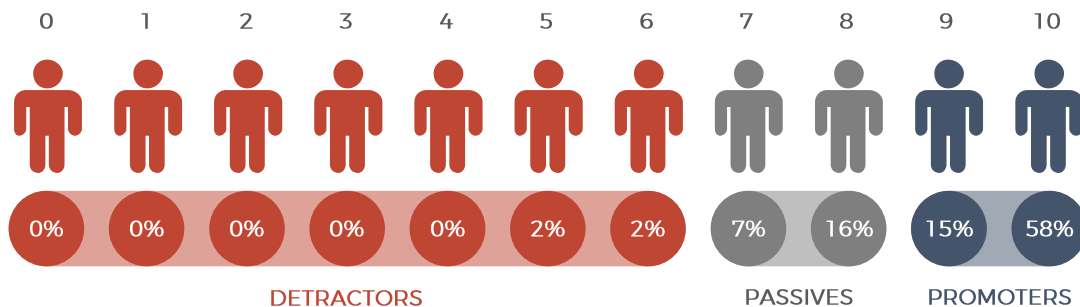


# NET PROMOTER SCORE (NPS)



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.



## Queenstown's NPS is +69

PROMOTERS (73.1%) minus DETRACTORS (4.1%)

NPS has decreased from +71 in YE Dec 2021.

NPS has decreased from +76 in Q1 2021 to +68 in Q1 2022.

NPS for New Zealand for YE Mar 2022 is +55.



### NPS is higher than average for

- Residents from Wellington (& Wairarapa) +75
- Those who visited Gibbston Valley +82
- Those visiting Queenstown for the first time +74
- Those who undertook a 'lake cruise and river activity' +83, 'adrenaline activity' +81, or 'wellness experience; +80



### NPS is lower than average for

- Canterbury residents +59
- 65+ year olds +58
- Those who visited the town centre/Frankton area only +61
- Those who stayed in Queenstown only 1-2 nights +59

# INTENTION TO RETURN



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

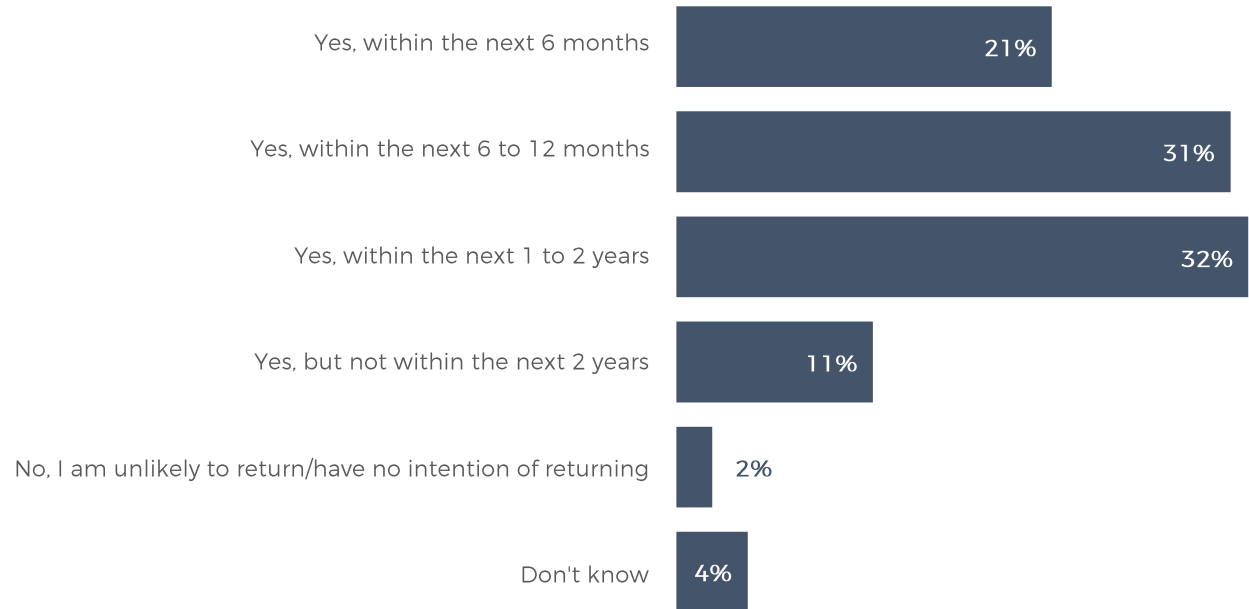


**84%** of visitors are  
intending to return to  
Queenstown in the  
next two years

**91%** of Aucklanders

**80%** of Wellingtonians

**91%** of Cantabrians



# 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	20%
Food and wine experiences	9%
Weather	4%
Variety of attractions and sites	4%
Atmosphere and vibe of Queenstown	3%
Great service and friendly locals	3%
Relaxing & quiet experiences	3%
Spending time with family/friends	2%
Walking and hiking	2%
Skyline Queenstown	2%
Skiing and snowboarding	2%
Ease of accessibility (i.e. getting around)	2%
Wineries (& wine generally)	1%
Presentation of Queenstown (e.g. beautiful, clean)	1%
Cycling and biking	1%
Helicopter tours	1%
Onsen Hot Pools	1%
<b>Base: Total Sample Apr 21 – Mar 22</b>	<b>n=625</b>

"The abundance of activities, and accommodation options. A lot of public spaces and most importantly with some activities in the space which make it more lively."

"The natural beauty of the district. Loved our excursion with Glenorchy Air to Milford sound. Great pilot and excellent value for money."

"Getting married on a glacier"

"We found the town really easy to get around driving, and didn't feel overwhelmed in the new environment."

"Boat trips, the fabulous restaurants, being able to wander around and sit on lake front at night till dark and feel very safe."

"Really good beach and playground area"

"Food and coffee in town was fabulous. Flame steak house was best meal ever! Weather was great, activities very easily accessed."

"TSS Earnshaw cruise and lunch was amazing"

"The awesome scenery, laid back friendly atmosphere and the ability to walk everywhere as we had no transport"

"Enjoying the scenery. Helpfulness of local staff at tourist destinations and the hotel."

Queenstown is a firm favourite of mine- everything about it is beautiful. As soon as your off the plane there is a scene of calmness and relaxation. It's an escape from reality its refreshing and the mountains and lake just make it.

"Queenstown is extremely clean, bright and well maintained. Compared to somewhere like Wellington, Auckland or other tourist destinations like Rotorua and Blenheim, it feels professional and as if money has been spent keeping it nice."

# SAMPLE PROFILE (NEW ZEALAND RESIDENTS)



Country of birth	
New Zealand	68%
Other country	32%
Region of residence	
Northland	2%
Auckland	31%
Waikato	10%
Bay of Plenty	8%
Cisborne	0%
Hawke's Bay	3%
Taranaki	2%
Manawatu-Whanganui	3%
Wellington (& Wairarapa)	17%
Tasman	1%
Nelson	1%
Marlborough	1%
West Coast	0%
Canterbury	13%
Otago	5%
Southland	3%
<b>Base: Total Sample Apr 21 – Mar 22</b>	<b>n=625</b>

Gender	
Male	49%
Female	50%
Gender Diverse	0%
Prefer not to say	0%
Age	
18-19 years	2%
20-24 years	7%
25-29 years	16%
30-34 years	16%
35-39 years	9%
40-44 years	10%
45-49 years	10%
50-54 years	10%
55-59 years	7%
60-64 years	5%
65-69 years	5%
70-74 years	3%
75+ years	1%
<b>Base: Total Sample Apr 21 – Mar 22</b>	<b>n=625</b>



In the most recent quarter, there appears to have been a change to the age profile of domestic visitors.

A comparison of Q1 2022 with Q1 2021:

- 18-29 years (14%, down from 24%)
- 30-44 years (41%, up from 22%)

