

DOMESTIC VISITOR SATISFACTION

Update: Year Ending December 2020

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING DECEMBER 2020

This report focuses on the most recent domestic trip taken by New Zealanders during the year ending December 2020. Included in this reporting period is the nationwide lockdown period that occurred during March – May 2020, and the Auckland lockdown that occurred during August – September 2020.

In 2020 three in four New Zealanders reported taking at least one overnight domestic leisure trip. Almost half of these trips were for a holiday or short break. The average trip length is three nights, but almost a fifth of New Zealanders travelled for seven nights or longer. The proportion of trips occurring in the Autumn months decreased to 17 percent (from 31 percent in 2019) – a likely effect of the initial nationwide lockdown in 2020. The proportion of event-related trips also decreased (from 18 percent to 14 percent).

Overall satisfaction remains relatively steady at an average of 8.7 out of 10, although the proportion rating their satisfaction at 9 or 10 out of 10 has increased. Those who included Canterbury, The Coromandel and Northland in their itinerary showed the highest levels of satisfaction with their trip. Older travellers and those on longer trips also tend to be more satisfied than other travellers.

Almost half of New Zealanders had their expectations exceeded on their most recent trip, however this proportion decreases with age – possibly because older travellers are more familiar with the destinations they visit. Of those that had their expectations exceeded, exploring scenic places and destinations being quieter than usual (because of a lack of international visitors) were top of mind.

The Net Promoter Score (NPS), which measures propensity to recommend New Zealand as a holiday destination, is +66 – up one point from the previous year. Despite being less likely to have had expectations exceeded, the NPS is higher amongst older travellers.

Some changes in travel behaviour and satisfaction are evident following the outbreak of COVID-19. A comparison of data collected in the six months ending December 2020 with the equivalent six months in 2019 shows that:

- Half of trips were for a holiday or short break (up from 42 percent)
- A larger proportion of New Zealanders visited Queenstown, the Bay of Plenty and Central Otago, and a smaller proportion visited Northland and Wellington
- Satisfaction increased – 63 percent rated their trip a 9 or 10 out of 10 (up from 58 percent)

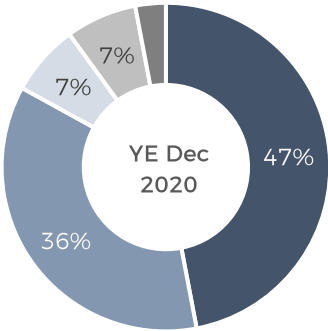
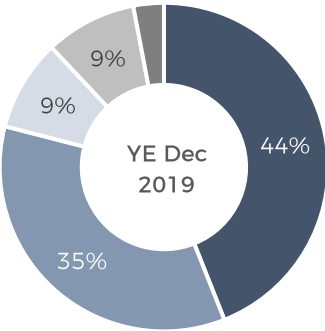
DOMESTIC VISITOR SATISFACTION

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP



3 in 4 New Zealand residents took an overnight domestic leisure trip in the past 12 months

MAIN REASON FOR TRIP



- For a holiday or short-break
- To visit family or friends
- To attend an event held by friends or family (e.g. wedding, funeral, or reunion)
- To attend an event held by someone else (e.g. a sporting event, concert or festival)
- Other

	YE Dec 2019	YE Dec 2020
Length of Trip:		
1 Night	13%	14%
2 Nights	28%	25%
3 Nights	19%	19%
4 Nights	11%	11%
5 Nights	10%	10%
6 Nights	3%	3%
7 Nights (or more)	16%	18%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,139	n=2,196

DOMESTIC VISITOR SATISFACTION

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

	YE Dec 2019	YE Dec 2020
Regions Visited (Top 15):		
Auckland	23%	23%
Wellington	15%	13%
Taupo	11%	11%
Rotorua	13%	11%
Bay of Plenty (excl. Rotorua)	11%	11%
Northland	13%	11%
Hamilton/Waikato (excluding Taupo and the Coromandel)	10%	10%
Christchurch	11%	10%
Canterbury (excl. Christchurch)	8%	9%
The Coromandel	8%	8%
Queenstown	7%	8%
Hawke's Bay	7%	7%
Palmerston North & Manawātū	6%	6%
Dunedin	6%	5%
Taranaki	4%	5%
Base: Total Sample	n=2,139	n=2,196

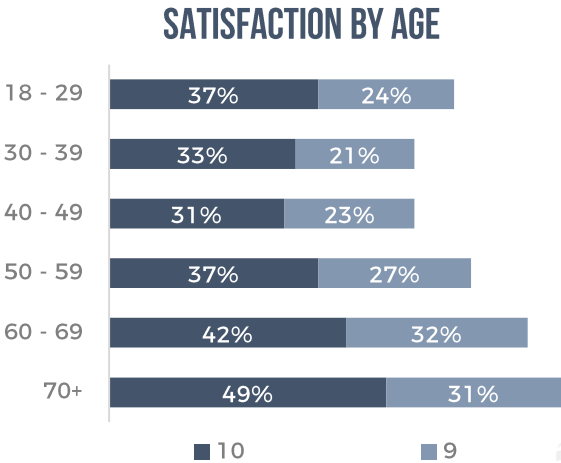
	YE Dec 2019	YE Dec 2020
Time of Year:		
January	15%	19%
February	11%	16%
March	12%	8%
April	11%	4%
May	8%	5%
June	8%	8%
July	8%	9%
August	8%	7%
September	9%	9%
October	9%	11%
November	10%	10%
December	10%	12%
Base: Total Sample	n=2,139	n=2,196

DOMESTIC VISITOR SATISFACTION

OVERALL SATISFACTION

On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

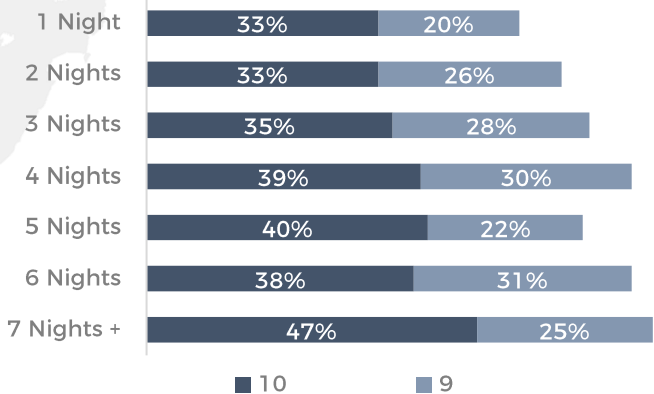
		Not at all satisfied						Extremely satisfied				
	Average	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	
Year Ending December 2019	8.6	0%	0%	0%	1%	2%	4%	11%	25%	24%	33%	
Year Ending December 2020	8.7	0%	0%	0%	0%	1%	4%	10%	21%	26%	38%	



Average

8.7
8.5
8.5
8.8
9.1
9.2

SATISFACTION BY LENGTH OF TRIP



Average

8.5
8.6
8.7
8.9
8.8
8.9
9.0

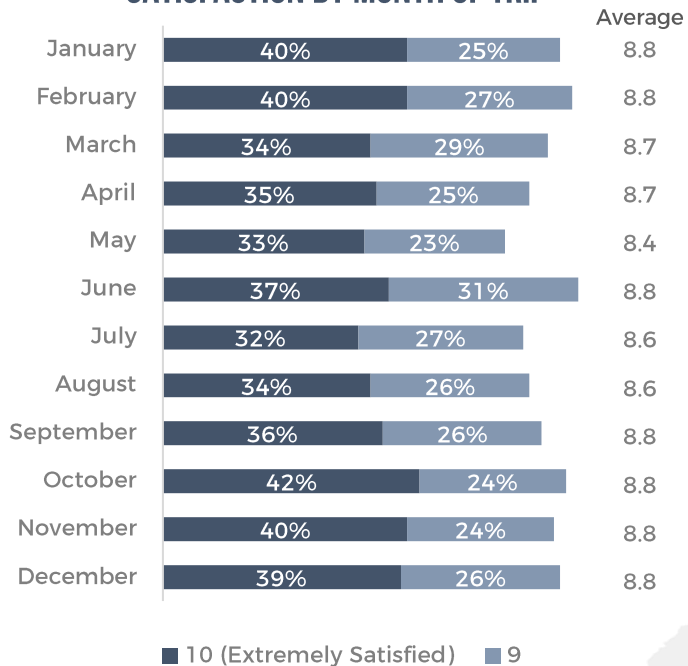
Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,196)

DOMESTIC VISITOR SATISFACTION

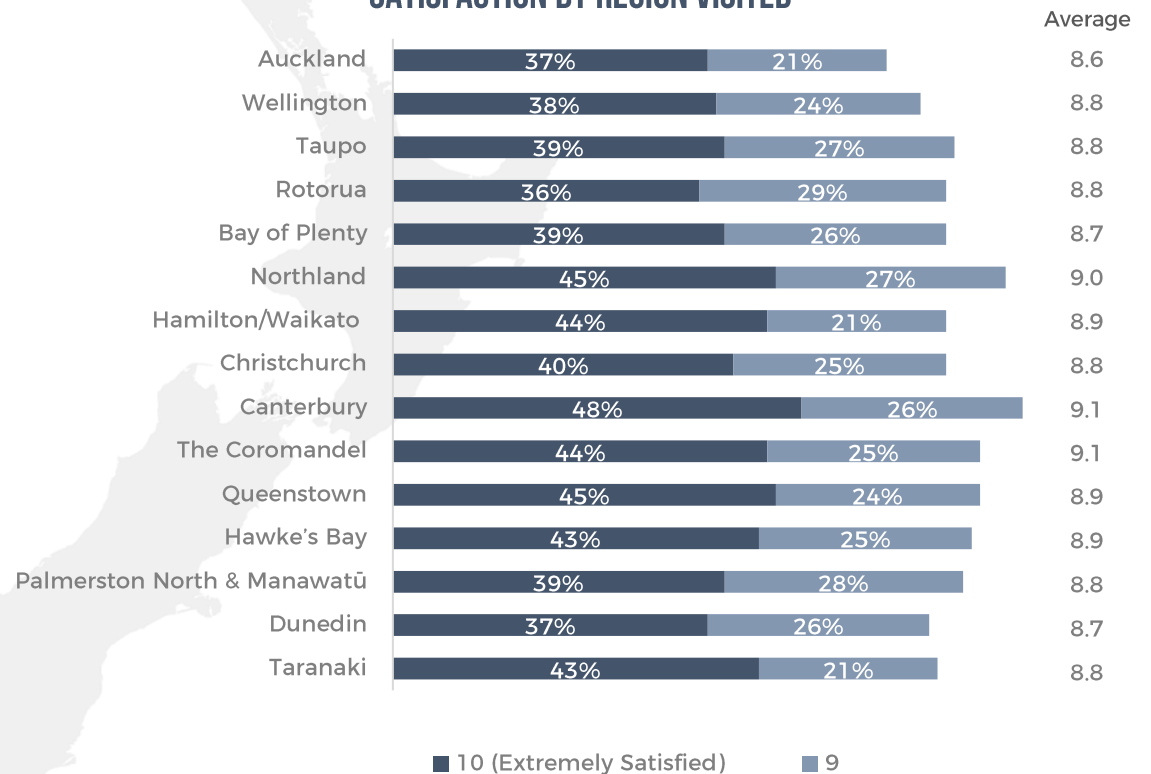
OVERALL SATISFACTION

On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

SATISFACTION BY MONTH OF TRIP



SATISFACTION BY REGION VISITED*



* Included are the 15 most commonly visited regions

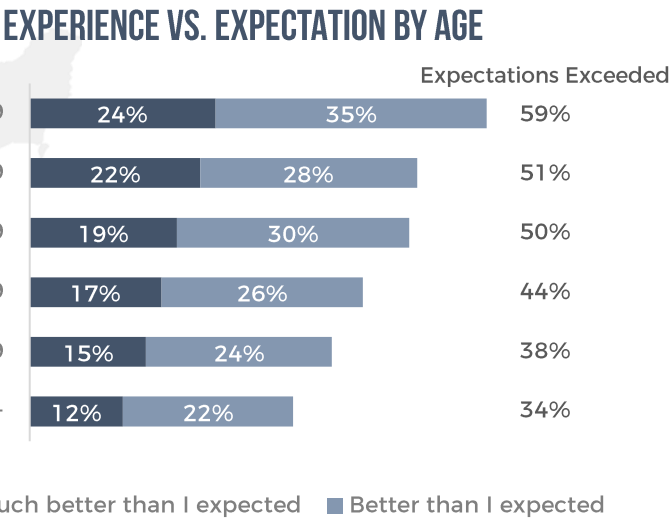
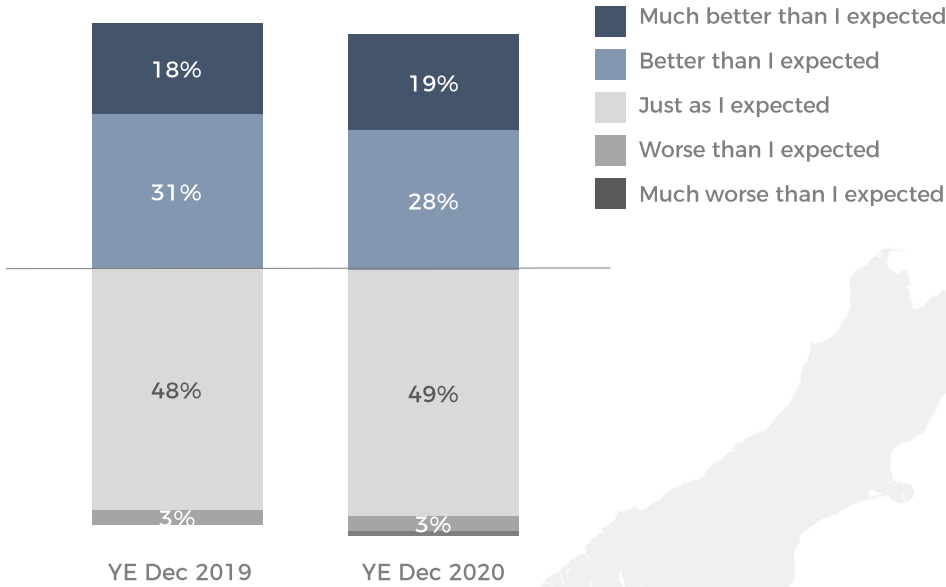
Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,196)

DOMESTIC VISITOR SATISFACTION

EXPERIENCE VS. EXPECTATION

Based on your previous travel, how did your overall experience on your most recent trip live up to your expectations?

47% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,196)

DOMESTIC VISITOR SATISFACTION

COMMENTS (Q4 2020)

For what reason/s did you rate your overall experience in that way?



"I had never been in a campervan before and it was a beautiful way to see the country"

"Had not been there for over 30 years and felt like the good ole NZ I loved"

"Fantastic place and lovely people in Christchurch"

"Great accommodation and excellent natural environment"

"Due to COVID Queenstown was empty. was great to go anywhere and get tickets easily"

"Good scenic place to visit and more time relaxing with family"

"We went places that tourists never go. Down nearly every unsealed road in Northland."

"Rotorua is usually full of overseas tourists, so it was a much more pleasurable experience to visit attractions without the throngs of foreign travellers"

"The weather was excellent, and the sightseeing was pristine at Doubtless Bay/Karikari Peninsula"

"Places we visited were of a higher standard than I thought they would be"

"The Motel we stayed in reduced its price and provided free continental breakfast every morning"

"I liked the change in scenery and although the weather wasn't great, I still found that I enjoyed the stay and the rural scenery. I gained a greater appreciation for rural New Zealand"

"I appreciated the peaceful tranquility of the country and being able to drive a short distance to the beach to fish"



"The place I stayed at overnight wasn't the best, also we went to Te Papa museum which wasn't as good as it used to be"

"Bad weather meant my planned activities didn't work out"

"Non ideal company and bad traffic"

"Poor hotel booking process, too expensive, not enough staff or facilities within the local restaurants etc, ski field couldn't cope with the amount of people"

"Everything's overpriced and meeting with new people was not a great experience"

"The city of Wellington was not that exciting as I thought"

"Was over charged for hotel and couldn't afford to do planned activities because of this"

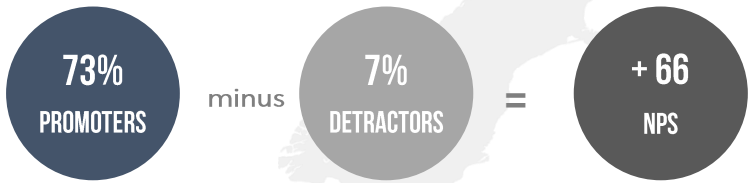
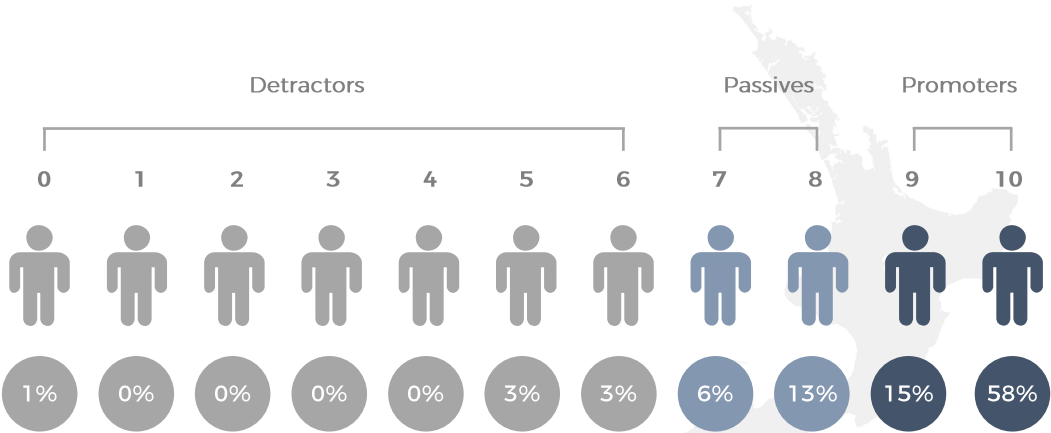
"Staying somewhere crowded"

DOMESTIC VISITOR SATISFACTION

NET PROMOTER SCORE (NPS)


On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend New Zealand as a holiday destination for New Zealanders?

The 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 BY AGE

18-29 years	+ 62
30-39 years	+ 61
40-49 years	+ 58
50-59 years	+ 69
60-69 years	+ 72
70 years+	+ 80



There has been no significant change in the Net Promoter Score over the past two years

YE Dec 2019: NPS + 65
72% Promoters - 7% Detractors

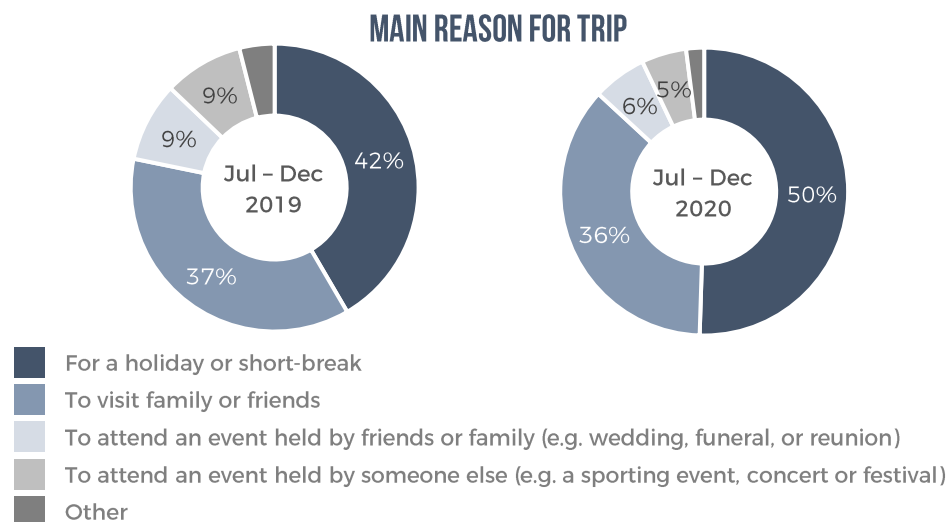
Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,196)

DOMESTIC VISITOR SATISFACTION

CHANGES IN DOMESTIC TRAVEL BEHAVIOUR

Following the emergence of COVID-19, changes in domestic travel behaviour and satisfaction are being closely monitored. The following two slides provide an overview of data collected during the July – December 2020 period, which has been compared with the same period the preceding year.

	Jul – Dec 2019	Jul – Dec 2020
Regions Visited (Top 15):		
Auckland	24%	22%
Wellington	16%	13%
Bay of Plenty (excl. Rotorua)	10%	13%
Christchurch	11%	11%
Taupō	12%	11%
Rotorua	12%	11%
Northland	14%	10%
Canterbury (excl. Christchurch)	8%	10%
Hamilton/Waikato (excluding Taupo and the Coromandel)	11%	10%
Queenstown	6%	9%
Hawke's Bay	6%	7%
Palmerston North & Manawātū	6%	7%
The Coromandel	8%	7%
Dunedin	6%	6%
Central Otago	3%	5%
Base: Total Sample	n=1,086	n=1,112



	Jul – Dec 2019	Jul – Dec 2020
Length of Trip:		
1 Night	14%	14%
2 Nights	29%	26%
3 Nights	19%	20%
4 Nights	10%	11%
5 Nights	10%	10%
6 Nights	3%	3%
7 Nights (or more)	15%	16%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=1,086	n=1,112

DOMESTIC VISITOR SATISFACTION

CHANGES IN DOMESTIC TRAVEL

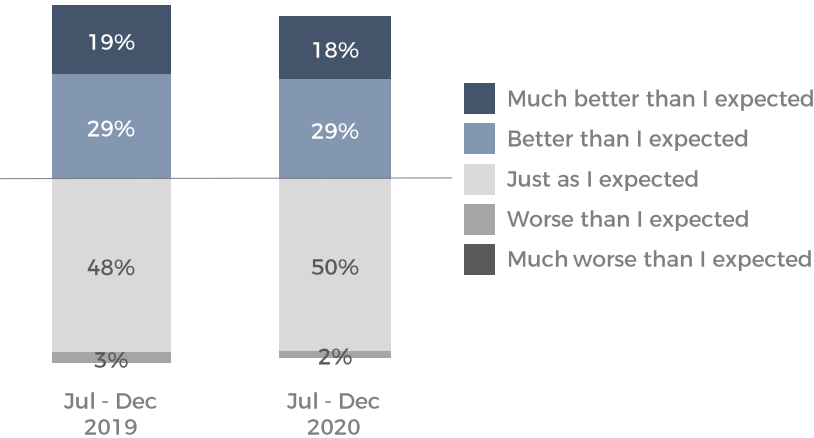
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

Based on your previous travel, how did your overall experience on your most recent trip live up to your expectations?

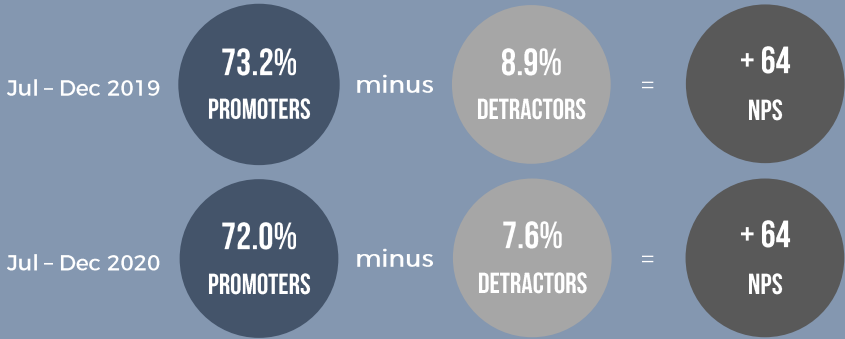
On a scale of 0 (not at all likely) to 10 (extremely likely), how likely are you to recommend New Zealand as a holiday destination for New Zealanders?

		Not at all satisfied						Extremely satisfied			
	Average	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)
July – December 2019	8.6	0%	0%	0%	1%	2%	4%	11%	24%	24%	34%
July – December 2020	8.7	0%	0%	0%	0%	1%	4%	10%	21%	27%	36%

47% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



The 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.



DOMESTIC VISITOR SATISFACTION

DOMESTIC VISITOR SATISFACTION TRACKING

Angus & Associates is an independent research and strategy consultancy specialising in the tourism and leisure sectors. The Visitor Insights Programme (VIP) is our ongoing programme revealing how New Zealand's visitors think, feel and act.

The Market Perceptions programme (the online component of the VIP) is designed to monitor perceptions of regional travel destinations within New Zealand to meet the needs of organisations across the industry, including Regional Tourism Organisations/Economic Development Agencies and individual operators. The Market Perceptions programme is conducted online, including on mobile devices. A total sample of n=4,800 New Zealand and Australian travellers are included in the programme each year (a monthly sample of n=200 New Zealanders and n=200 Australians), recruited via Dynata's consumer panel. Respondents must be aged 18+ years to participate. Quotas based on New Zealand and Australian census data (region of residence, gender and age) are applied to ensure a population-representative sample.

To qualify to participate in the Domestic Visitor Satisfaction tracking module, respondents must also have travelled overnight in New Zealand within the past 12 months for leisure purposes (i.e. excluding trips taken for the primary purpose of business, education, stopover, medical treatment and other non-leisure purposes).

This update is based on data collected between 1 January 2019 and 31 December 2020. The next update will be available in April 2021.

For more information about these findings, and the Visitor Insights Programme, please contact:



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