

DOMESTIC VISITOR SATISFACTION

Update: Year Ending June 2020

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING JUNE 2020

This report covers the year ending June 2020. While the data takes into account the lockdown period (March 2020 – May 2020) when domestic travel was not permitted, respondents are asked about their last domestic trip taken over the past 12 months.

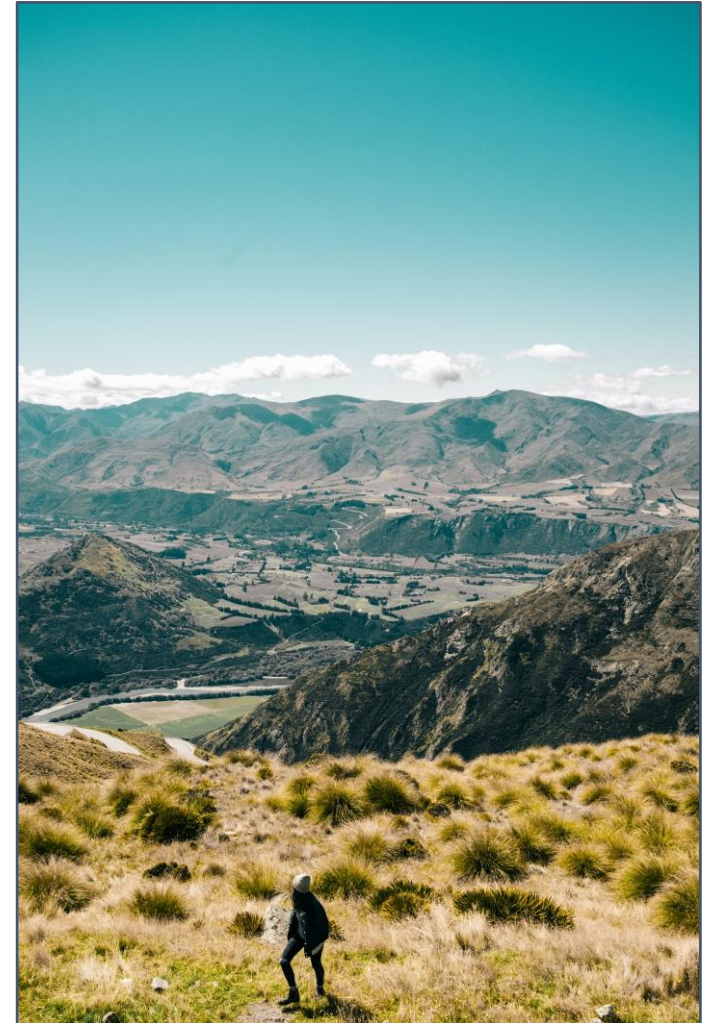
Three in four New Zealand residents took an overnight domestic leisure trip within the past 12 months, of which 37 percent said their main reason for the trip was to visit family and friends. The average (median) length of trip was three nights, with two in five New Zealanders spending 1-2 nights away from home.

New Zealanders continue to have positive domestic travel experiences, rating their most recent trip an average 8.7 out of 10. Those who included Canterbury, Northland, Taupo and the Coromandel in their travel itinerary experienced the highest levels of satisfaction. It also appears that the longer the trip, the higher the level of satisfaction.

One in two kiwis indicate that their expectations were exceeded on their most recent domestic overnight leisure trip, increasing to 59 percent of those aged 18-29 years, but decreasing to 35 percent of those aged 70 years or more. One explanation may be that younger New Zealanders are more likely to travel with a critical attitude, than their older more well-travelled counterparts who are less likely to have their expectations exceeded.

The propensity to recommend New Zealand as a holiday destination for New Zealanders maintains the previous year's score of +67.

Early indications suggest that there may be an increase in the proportion of New Zealanders who are travelling to visit family and friends post-lockdown. Any post-lockdown shifts in domestic travel will be more apparent in the next quarterly report (delivered in October).



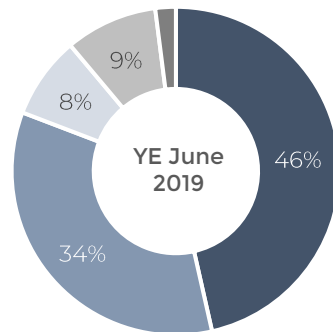
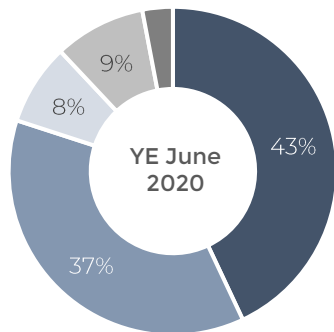
DOMESTIC VISITOR SATISFACTION

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP



3 in 4 New Zealand residents took an overnight domestic leisure trip within 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 June 2020	YE June 2019
Length of Trip:		
1 Night	14%	13%
2 Nights	26%	27%
3 Nights	19%	20%
4 Nights	10%	11%
5 Nights	10%	10%
6 Nights	3%	3%
7 Nights (or more)	18%	16%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,170	n=2,127

DOMESTIC VISITOR SATISFACTION

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

	YE June 2020	YE June 2019
Regions Visited:		
Auckland	25%	23%
Wellington	14%	14%
Northland	13%	13%
Taupo	12%	11%
Rotorua	12%	13%
Hamilton/Waikato (excluding Taupo and the Coromandel)	11%	10%
Christchurch	10%	11%
The Coromandel	9%	8%
Bay of Plenty (excl. Rotorua)	9%	10%
Hawke's Bay	7%	7%
Canterbury (excl. Christchurch)	7%	9%
Queenstown	6%	8%
Dunedin	6%	5%
Taranaki	5%	5%
Palmerston North & Manawātū	5%	6%
Nelson	5%	4%
Base: Total Sample	n=2,170	n=2,127

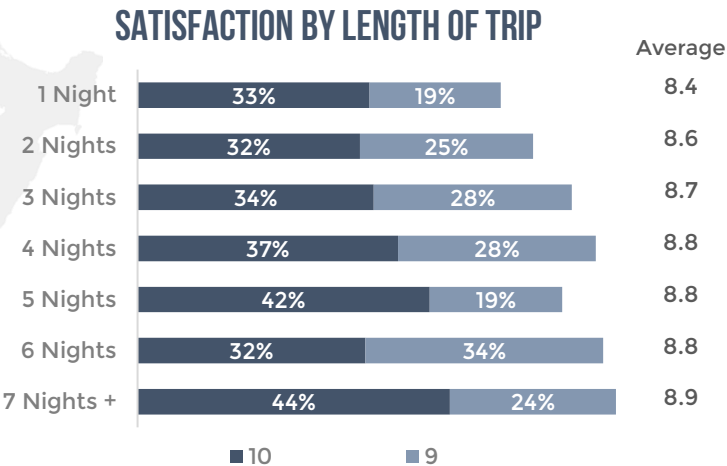
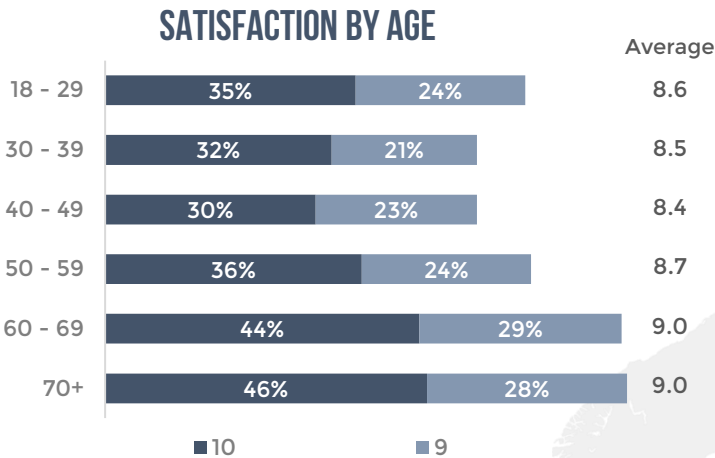
	YE June 2020	YE June 2019
Time of Year:		
January	18%	17%
February	14%	12%
March	10%	11%
April	7%	12%
May	7%	9%
June	8%	8%
July	8%	7%
August	8%	8%
September	9%	9%
October	9%	9%
November	10%	9%
December	12%	10%
Base: Total Sample	n=2,170	n=2,127

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 June 2020	8.7	0%	0%	0%	1%	2%	4%	10%	22%	24%	36%	
Year Ending June 2019	8.7	0%	0%	0%	1%	2%	3%	10%	25%	23%	36%	



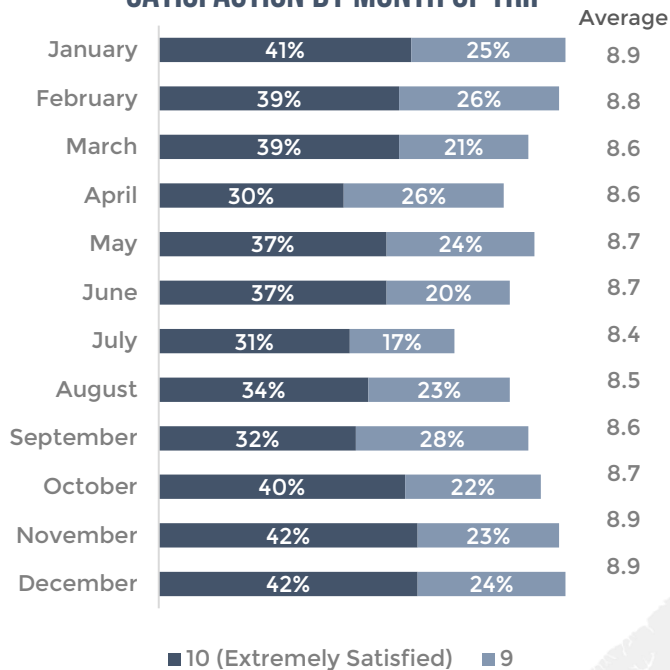
Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,170)

DOMESTIC VISITOR SATISFACTION

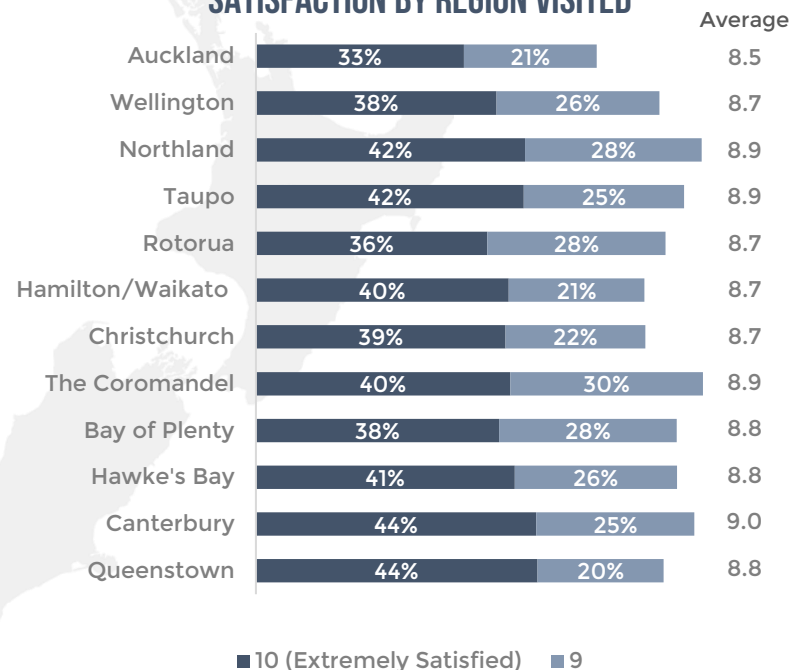
OVERALL SATISFACTION

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



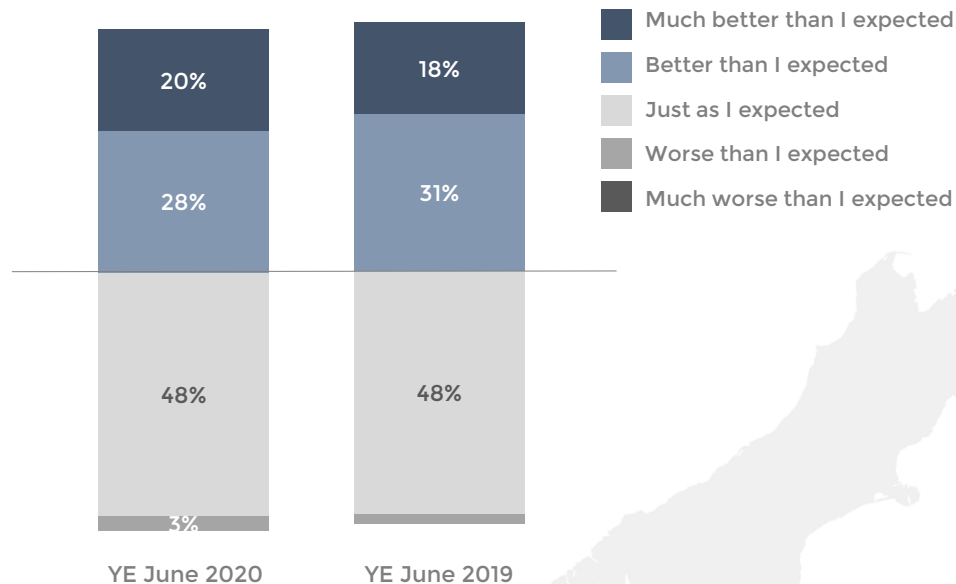
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DOMESTIC VISITOR SATISFACTION

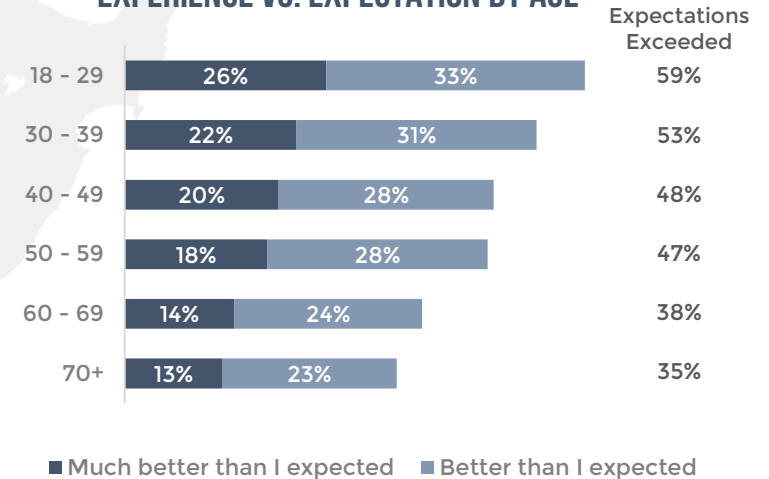
EXPERIENCE VS. EXPECTATION

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

48% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



EXPERIENCE VS. EXPECTATION BY AGE



Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,170)

DOMESTIC VISITOR SATISFACTION

COMMENTS (Q2 2020)

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



"Really enjoyed the trip as first time in a campervan and West Coast and Tekapo areas"

"Exceptional hospitality businesses, beautiful local surroundings, friendly people, delicious wine"

"Great motel accommodation in Hokitika, lovely scenic walk and tree top walk experience"

"The weather was great and our accommodation was fantastic. the drive down there and back was great without any detours or traffic problems"

"Good weather, Great scenery and everything wasn't overpopulated with tourist due to COVID border restrictions"

"Whichever place we stop at we get the best service in general. Traffic is not so bad and the country is always clean."

"The incredible activities, beach swimming, bush walk and water park"

"We actually stayed in Moeraki and everything about the little town is absolutely perfect for relaxation and to switch off"

"Amazing places, mystical adventures, magical experience, intense and deep connection with the nature"

"I had never seen Glow worms and to see them in a cave was wonderful. I also loved Hobbiton"

"Exciting trip, great views through Arthur's Pass"

"Because it was great to reconnect with friends and spend quality time in the outdoors"

"The weather was great and we had a good time in the hot pools and some lovely meals"

"It was enjoyable and having rental could see what we wanted and was not too crowded this time of year"



"Disappointed with lack of options for eating out, outdated hotels, Paihia in desperate need of smartening up -tired rundown no street appeal, Waitangi turning into a tired slum"

"I was caught up in the cancellation of NZ Festival events"

"Air NZ stuffed up our flights and we were on our way to my Grandmothers funeral so we missed out on a lot of time to spend with family"

"The accommodation was great but the concert we attended was oversold and badly organized"

"People were not nice at the airport in Tauranga and in Tauranga"

"Not many restaurants open due to covid"

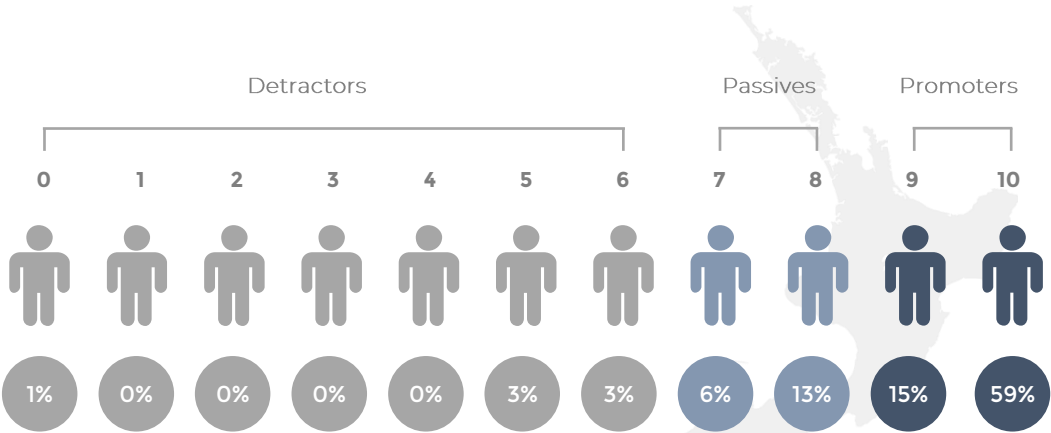
"Because we went into lockdown and had to cut our trip short. Also, it was weird being away in those circumstances, people treated us differently."

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	+ 61
30-39 years	+ 59
40-49 years	+ 63
50-59 years	+ 67
60-69 years	+ 71
70 years+	+ 81

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

YE June 2019: NPS + 67
73% Promoters - 6% Detractors

Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,170)

DOMESTIC VISITOR SATISFACTION

DOMESTIC VISITOR SATISFACTION TRACKING

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

The Visitor 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 Visitor 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 July 2018 and 30 June 2020. The next update will be available in October 2020.

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



Tourism Industry Aotearoa
Bruce Bassett
bruce.bassett@tia.org.nz



Angus & Associates
(04) 499 2212
vip@angusassociates.co.nz

