

DOMESTIC VISITOR SATISFACTION

Update: Year Ending March 2021

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UPDATE: YEAR ENDING MARCH 2021

This report provides an overview of New Zealanders' most recent domestic leisure trip taken within the past 12 months prior to survey completion. The data presents an aggregate view from surveys completed between April 2020 and March 2021 (meaning that the trip reported on may have taken place as far back as April 2019 or as recently as March 2021). Included in this reporting period is the nationwide COVID-19 lockdown period that occurred during March – May 2020, and the subsequent Auckland lockdowns that occurred during August – September 2020 and February 2021.

In the past 12 months, three in four New Zealanders took an overnight domestic leisure trip. Reflecting the nationwide lockdown during March – May 2020, there was a decline in the proportion of New Zealanders who took a domestic leisure trip during the Autumn months (16% down from 31% in the preceding year), with an increase in domestic travel over the Summer months (48% up from 38%). With COVID-19 restrictions throughout 2020, event travel has also softened (13% down from 18%), while visiting family and friends has remained stable (36%). Compared with the preceding year, it appears that New Zealand leisure travellers are travelling away from home for longer periods, with a softening in the proportion of travellers taking a shorter 1-2 night getaway (37% down from 41%).

One in two New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip, with only two percent noting their experience was worse than expected. This reflects New Zealanders' high overall level of satisfaction, with their experience rating an average 8.7 (out of 10), consistent with the previous year. Overall satisfaction appears to increase among older age groups and with longer trips.

The Net Promoter Score (NPS), which measures propensity to recommend New Zealand as a holiday destination is +64, down two points from the preceding year. Almost three in four New Zealanders are classified as Promoters who would actively recommend New Zealand as a holiday destination to friends and family.

Following the emergence of COVID-19 in New Zealand, some changes in travel behaviour and propensity to recommend New Zealand as a travel destination have been observed. Comparing data collected in the six months ending March 2021 with the equivalent six months ending March 2020 shows:

- A decline in travel to Auckland and an increase in travel to Canterbury, Queenstown and Palmerston North/Manawatu
- A decline in event related travel (9% down from 19%)
- A softening in the Net Promoter Score (+63 down from +68)

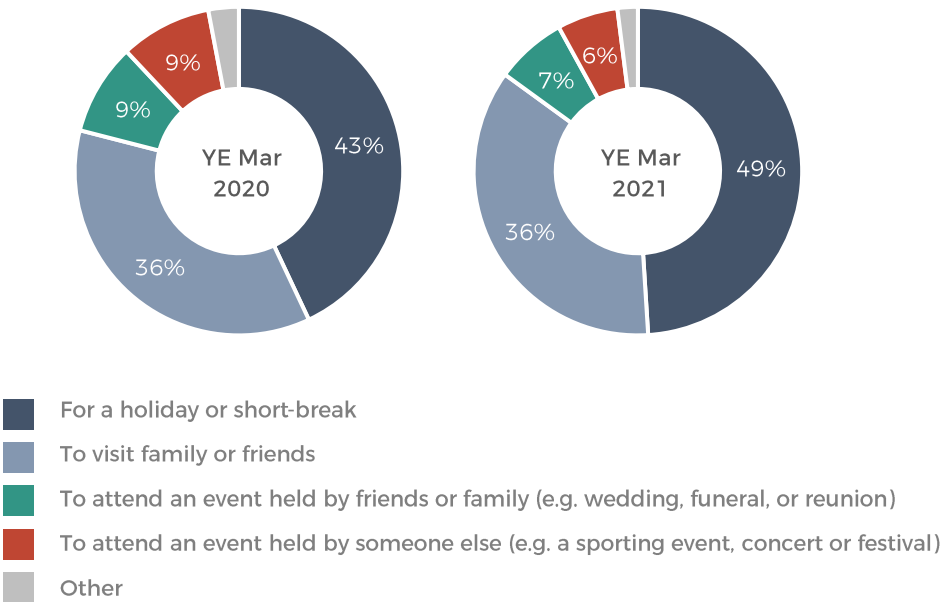
DOMESTIC VISITOR SATISFACTION

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



	YE Mar 2020	YE Mar 2021
Length of Trip:		
1 Night	14%	13%
2 Nights	27%	24%
3 Nights	19%	19%
4 Nights	11%	11%
5 Nights	10%	10%
6 Nights	3%	3%
7 Nights (or more)	17%	19%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,183	n=2,187

DOMESTIC VISITOR SATISFACTION

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

	YE Mar 2020	YE Mar 2021
Regions Visited (Top 15):		
Auckland	24%	22%
Wellington	14%	13%
Christchurch	10%	11%
Hamilton/Waikato (excluding Taupo and the Coromandel)	10%	11%
Rotorua	12%	11%
Bay of Plenty (excl. Rotorua)	10%	11%
Taupō	11%	11%
Northland	13%	11%
Canterbury (excl. Christchurch)	8%	10%
Queenstown	7%	8%
Hawke's Bay	6%	8%
The Coromandel	8%	7%
Palmerston North & Manawātū	5%	7%
Dunedin	6%	6%
Taranaki	5%	5%
Base: Total Sample	n=2,183	n=2,187

	YE Mar 2020	YE Mar 2021
Time of Year:		
January	16%	20%
February	11%	16%
March	12%	8%
April	11%	3%
May	8%	5%
June	8%	8%
July	8%	9%
August	8%	7%
September	9%	9%
October	9%	11%
November	9%	10%
December	11%	12%
Base: Total Sample	n=2,183	n=2,187

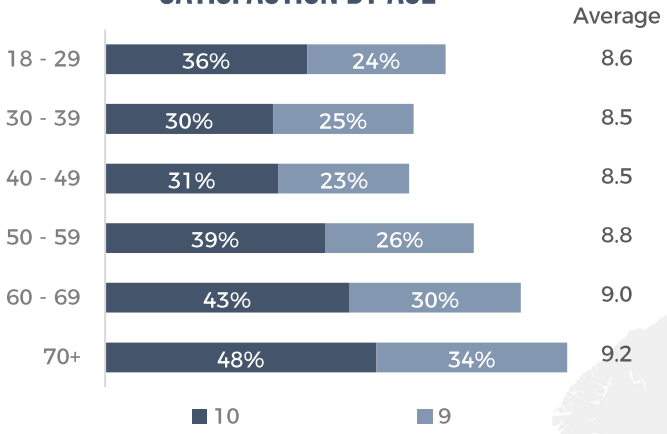
DOMESTIC VISITOR SATISFACTION

OVERALL SATISFACTION

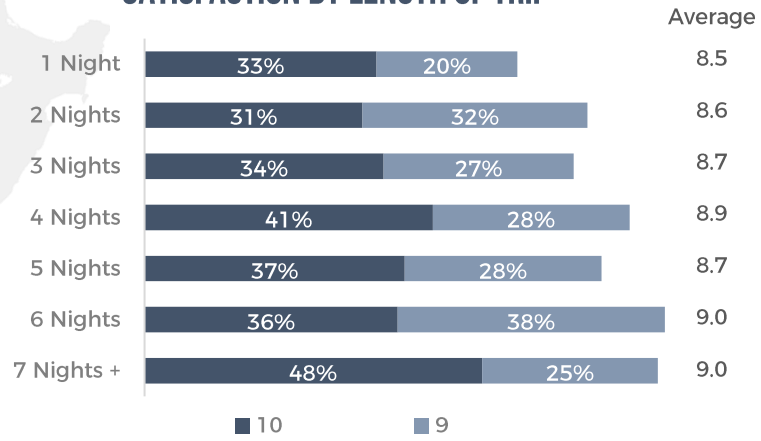
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

		Not at all satisfied						Extremely satisfied				
	Average	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	
Year Ending March 2020	8.7	0%	0%	0%	1%	2%	3%	11%	24%	24%	35%	
Year Ending March 2021	8.7	0%	0%	0%	0%	2%	4%	10%	21%	26%	37%	

SATISFACTION BY AGE



SATISFACTION BY LENGTH OF TRIP

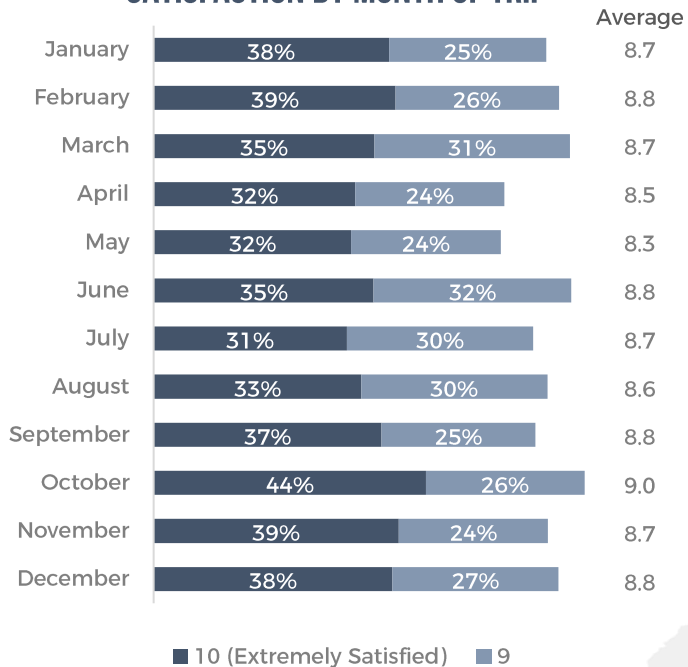


DOMESTIC VISITOR SATISFACTION

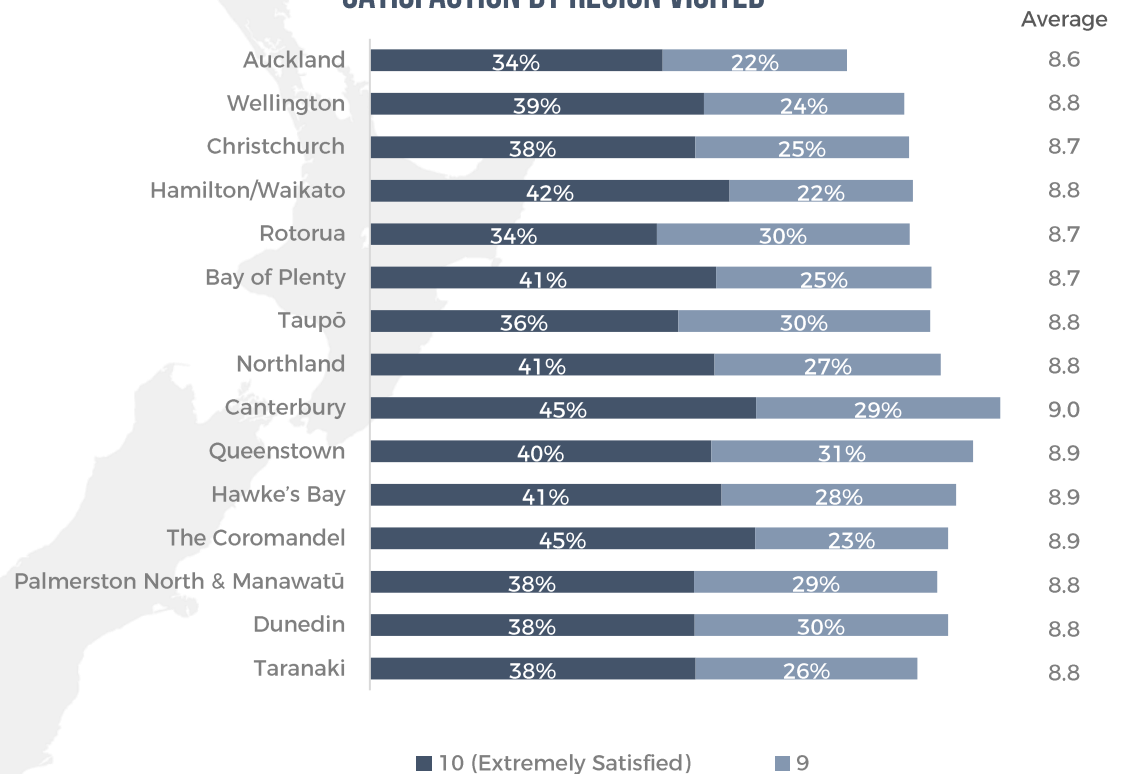
OVERALL SATISFACTION

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 *



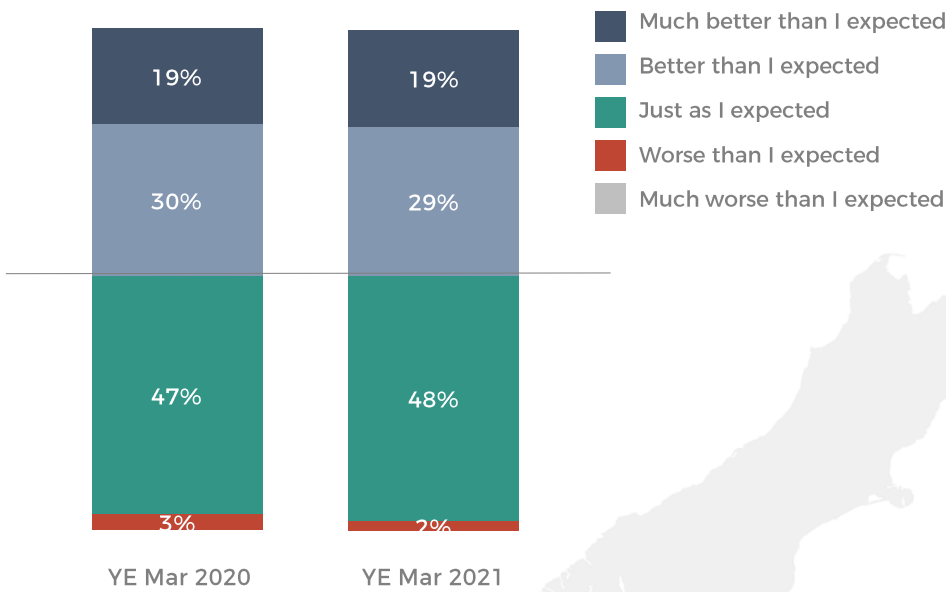
* Included are the 15 most commonly visited regions

DOMESTIC VISITOR SATISFACTION

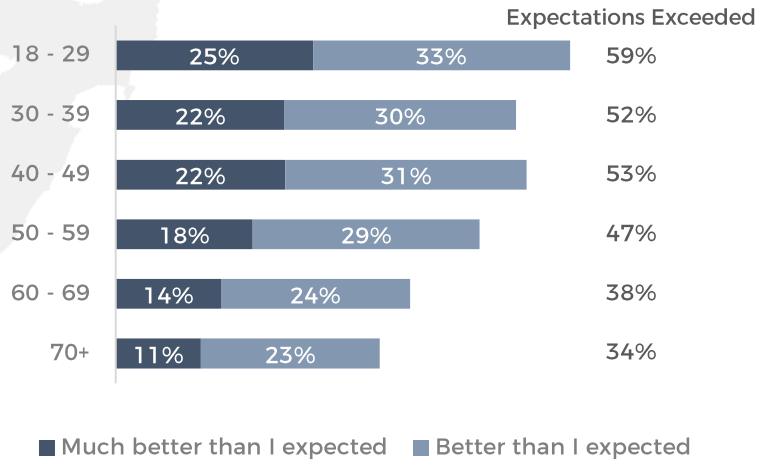
EXPERIENCE VS. EXPECTATION

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



DOMESTIC VISITOR SATISFACTION

COMMENTS (Q1 2021)

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



"I camped for 4 nights at a free camp site which was stunning and then had one night in a hotel, where I was given 2 free upgrades upon arrival - the staff were super friendly and the room had the most amazing view!!!"

"Friendly service providers, delicious food, great weather, lovely hotel"

"I was anxious about covid restrictions affecting our trip and possibly having to cancel activities but that wasn't the case and everything went smoothly"

"We has a nice time and it was a different experience without international tourism"

"I forgot how much fun it is to visit our own country we used to travel around New Zealand about 10yrs ago and took short trips but then Australia and the Pacific Islands and other places looked more interesting. We only took day trips or overnight trips in New Zealand and now since the border closed our country has never looked better."

"A lot of interesting experiences, adventures, friendly people everywhere, not too expensive"

"Fiordland is a pristine part of the world. it was great to follow Captain Cook's journey."

"I haven't been to Christchurch for more than 5 years, and it has improved compared to the last time I went"

"I just didn't know much about what NZ tourism had to offer and I was surprisingly impressed"

"Hotel provided free EV charging, which I was unaware of. Also discovered and visited a recently opened cultural centre that I didn't know about."

"It was a nice trip away, nice to explore the Taranaki province and see places I haven't been before"



"Raining and too many road works"

"The accommodation was not what I expected"

"I was told the Bay of Islands was amazing, but it was a let down, with not much to do"

"Bursting water pipes in Wellington"

"I won a competition to stay in a 5 star room at the Pullman Hotel with meals included but when I got there they gave us a 3 star room that was small and smelt like an old damp suitcase and we had to pay for our meals. We actually just decided to go back home that evening."

"Not many dog-friendly places in the Coromandel"

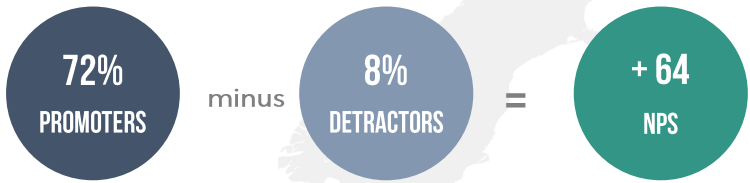
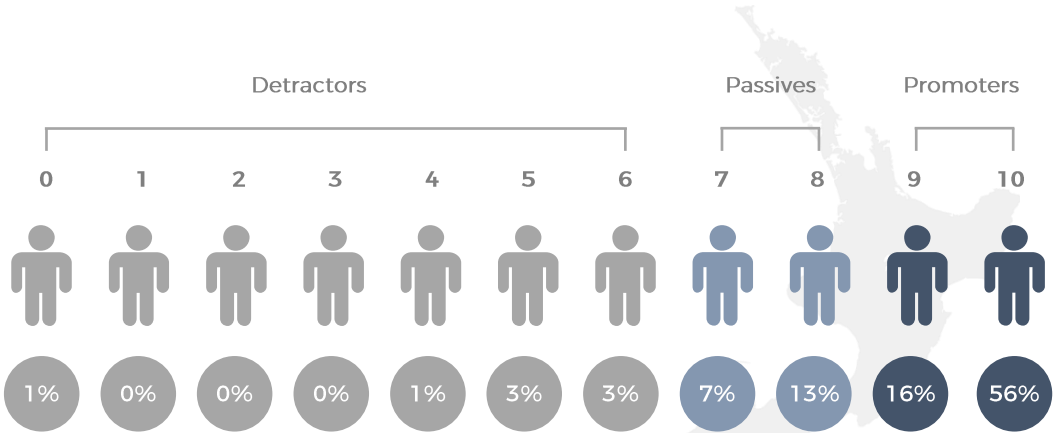
"Weather wasn't good on the first day"

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	+ 60
30-39 years	+ 58
40-49 years	+ 54
50-59 years	+ 70
60-69 years	+ 72
70 years+	+ 81

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

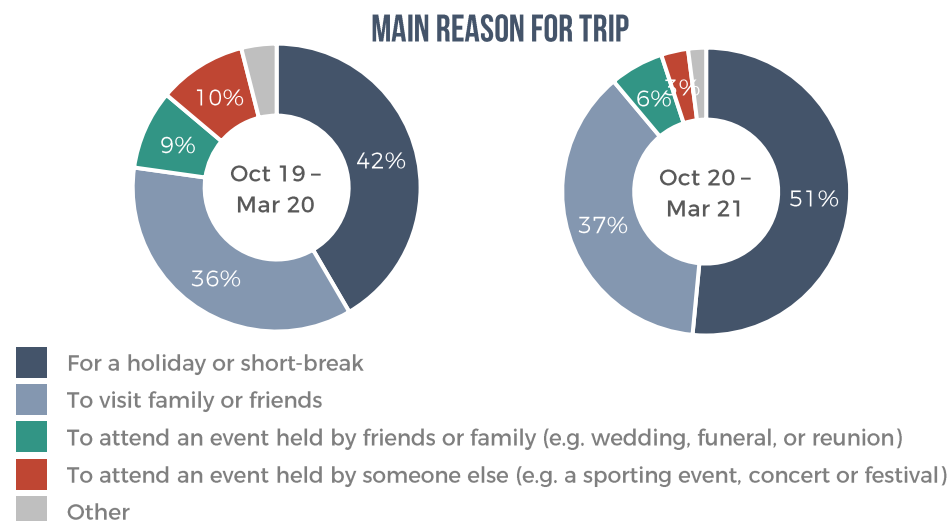
YE Mar 2020: NPS + 66
73% Promoters - 7% Detractors

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 October 2020 – December 2021 period, which has been compared with the same period the preceding year.

	Oct 19 – Mar 20	Oct 20 – Mar 21
Regions Visited (Top 15):		
Auckland	25%	21%
Wellington	14%	14%
Christchurch	10%	12%
Hamilton/Waikato (excluding Taupo and the Coromandel)	10%	12%
Northland	13%	12%
Rotorua	11%	12%
Bay of Plenty (excl. Rotorua)	10%	11%
Canterbury (excl. Christchurch)	8%	11%
Taupo	11%	10%
Queenstown	6%	9%
Hawke's Bay	7%	8%
Palmerston North & Manawatu	5%	8%
The Coromandel	9%	7%
Dunedin	7%	7%
Taranaki	6%	6%
Base: Total Sample	n=1,090	n=1,116



	Oct 19 – Mar 20	Oct 20 – Mar 21
Length of Trip:		
1 Night	14%	14%
2 Nights	26%	23%
3 Nights	19%	20%
4 Nights	11%	12%
5 Nights	9%	10%
6 Nights	3%	3%
7 Nights (or more)	18%	19%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=1,086	n=1,112

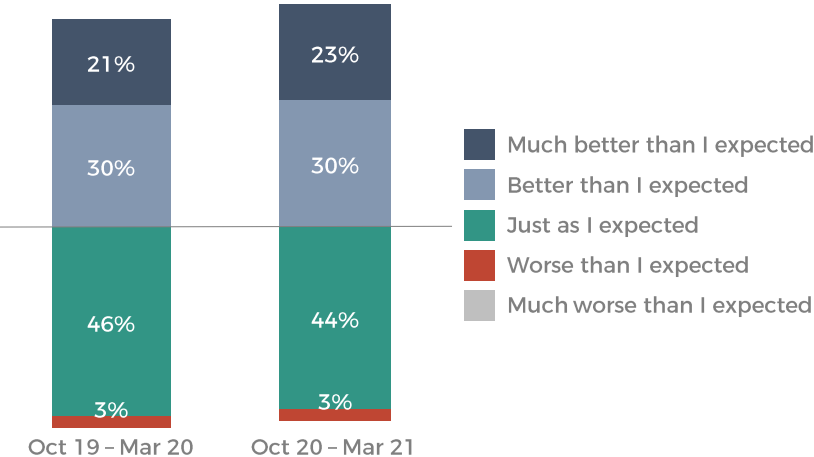
DOMESTIC VISITOR SATISFACTION

CHANGES IN DOMESTIC TRAVEL

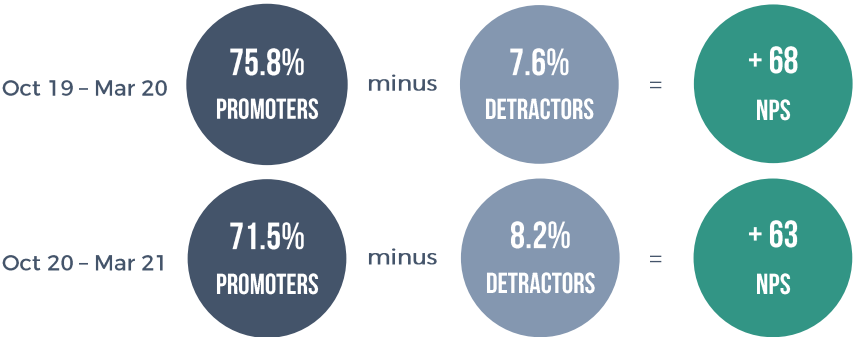
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?
 Based on your previous travel, how did your overall experience on your most recent trip live up to your expectations?
 On a scale of 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)	
Oct 2019 – Mar 2020	8.7	0%	0%	0%	1%	2%	3%	9%	21%	25%	38%	
Oct 2020 – Mar 2021	8.7	0%	0%	0%	0%	2%	3%	9%	20%	27%	38%	

53% 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 April 2020 and 31 March 2021. The next update will be available in July 2021.

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



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<https://www.tia.org.nz/resources-and-tools/insight/domestic-satisfaction-report>

