

# DOMESTIC VISITOR SATISFACTION

Update: Year Ending March 2020

## DOMESTIC VISITOR SATISFACTION

# UPDATE: YEAR ENDING MARCH 2020

In the year ending March 2020, three in four New Zealand residents took an overnight domestic trip for leisure purposes. Almost half of these trips were taken primarily to visit friends or family, or to attend an event held by friends or family. The average (median) length of trip was three nights.

New Zealanders continue to have positive experiences when travelling domestically for leisure purposes. Overall satisfaction with most recent trip averaged 8.7 out of 10, with half of all travellers reporting that their experience had exceeded their expectations. This high level of domestic travel satisfaction was reflected in a Net Promoter Score of + 66 for New Zealand as a holiday destination.

New Zealanders who travelled between November and January reported higher levels of overall satisfaction with their trip than those who travelled in the Winter months. Higher levels of satisfaction were noted among those who included Northland, Coromandel Peninsula, Hawkes Bay and the wider Canterbury region in their travel itinerary. Longer holidays (4+ nights) appear to garner higher levels of overall satisfaction than shorter weekend getaways.

As noted previously, younger New Zealanders report lower levels of overall satisfaction with their domestic trips, but are more likely to indicate that their experiences exceeded their expectations. Propensity to recommend New Zealand as a holiday destination to others increases with age.

Domestic trip profiles and overall satisfaction with domestic travel have remained consistent over the past two years, with no significant shifts in any of the tracking metrics (Overall Satisfaction, Experience vs. Expectation or Net Promoter Score).



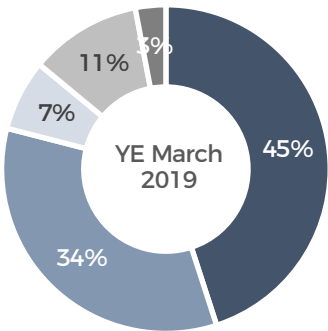
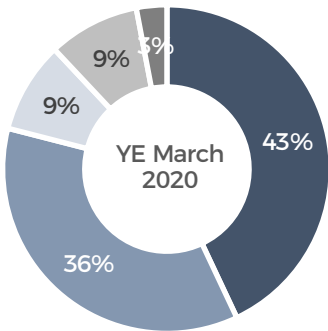
DOMESTIC VISITOR SATISFACTION

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 March 2020	YE March 2019
Length of Trip:		
1 Night	14%	13%
2 Nights	27%	26%
3 Nights	19%	20%
4 Nights	11%	11%
5 Nights	10%	10%
6 Nights	3%	4%
7 Nights (or more)	17%	16%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,183	n=2,104

## DOMESTIC VISITOR SATISFACTION

# PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

	YE March 2020	YE March 2019
Regions Visited:		
Auckland	24%	23%
Wellington	14%	14%
Northland	13%	13%
Rotorua	12%	12%
Taupo	11%	11%
Hamilton/Waikato (excl. Taupo/Coromandel)	10%	11%
Bay of Plenty (excl. Rotorua)	10%	11%
Christchurch	10%	11%
Coromandel Peninsula	8%	8%
Canterbury (excl. Christchurch)	8%	8%
Queenstown	7%	8%
Hawke's Bay	6%	8%
Dunedin	6%	5%
Palmerston North & Manawātū	5%	6%
Taranaki	5%	5%
Nelson	5%	4%
Base: Total Sample	n=2,183	n=2,104

	YE March 2020	YE March 2019
Time of Year:		
January	16%	16%
February	11%	13%
March	12%	11%
April	11%	12%
May	8%	10%
June	8%	8%
July	8%	7%
August	8%	8%
September	9%	9%
October	9%	10%
November	9%	9%
December	11%	10%
Base: Total Sample	n=2,183	n=2,104

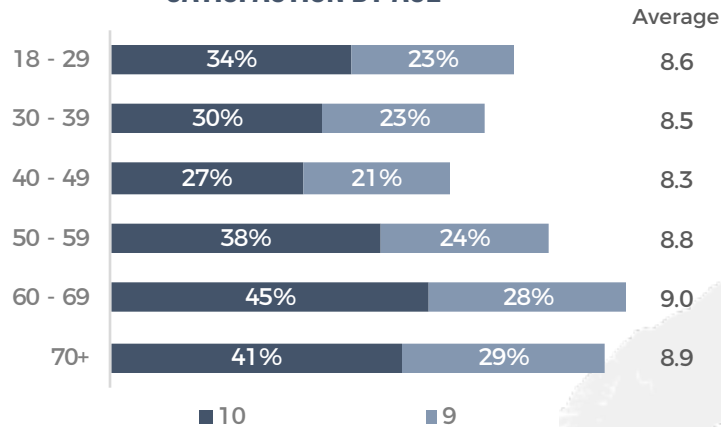
## DOMESTIC VISITOR SATISFACTION

# OVERALL SATISFACTION

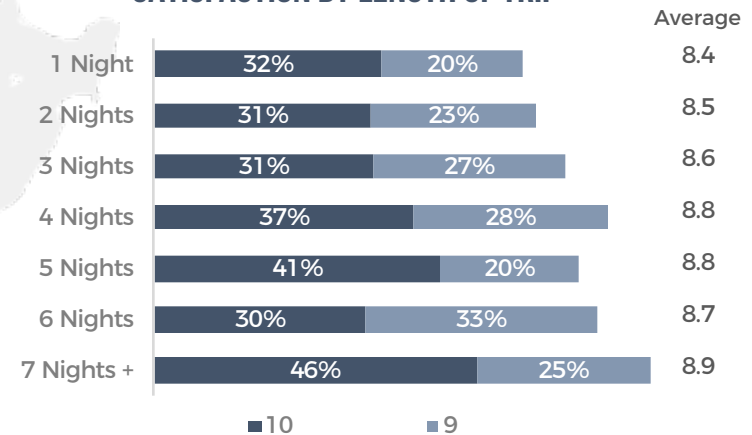
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

		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 2019	8.6	0%	0%	0%	1%	2%	4%	10%	24%	23%	36%

### SATISFACTION BY AGE



### SATISFACTION BY LENGTH OF TRIP



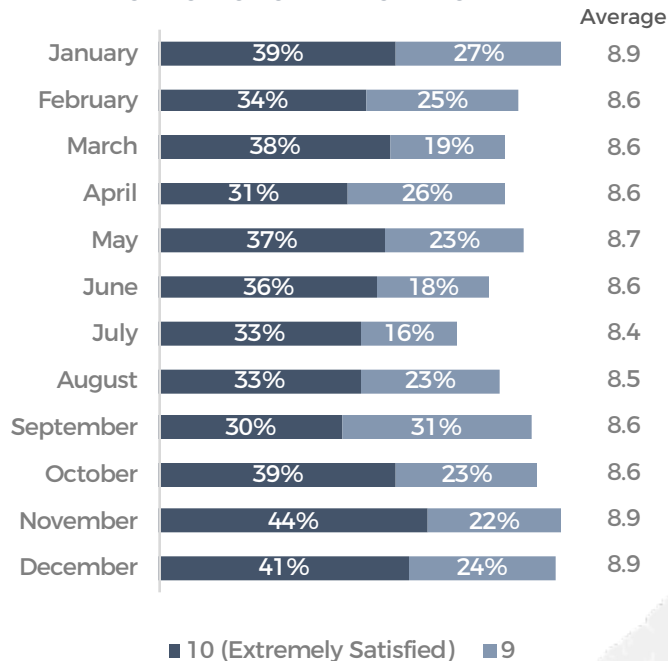
Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,183)

## DOMESTIC VISITOR SATISFACTION

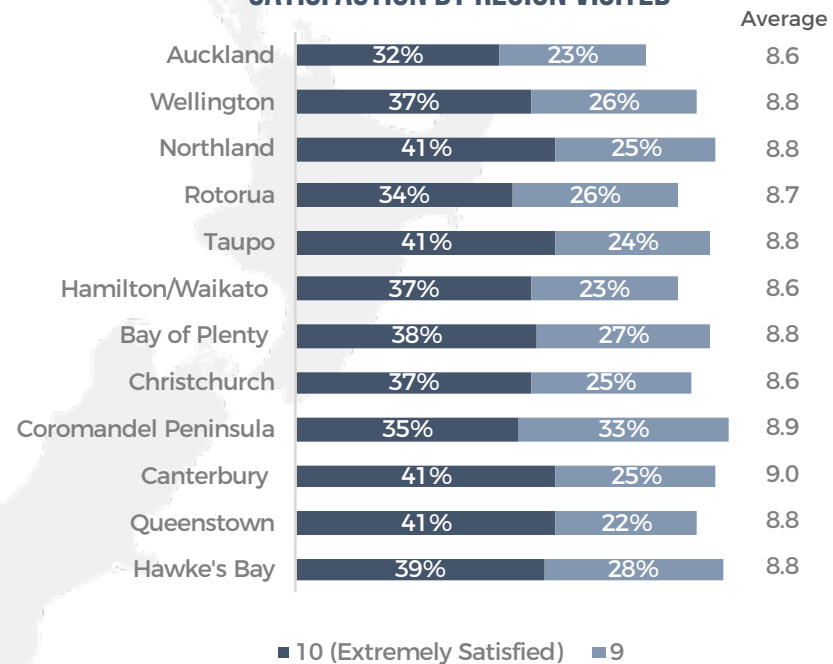
# OVERALL SATISFACTION

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



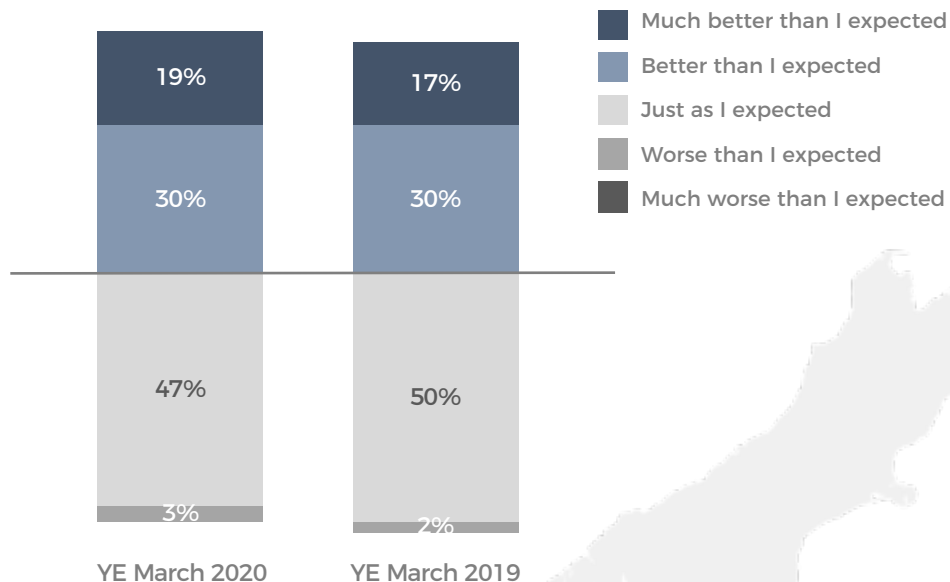
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## DOMESTIC VISITOR SATISFACTION

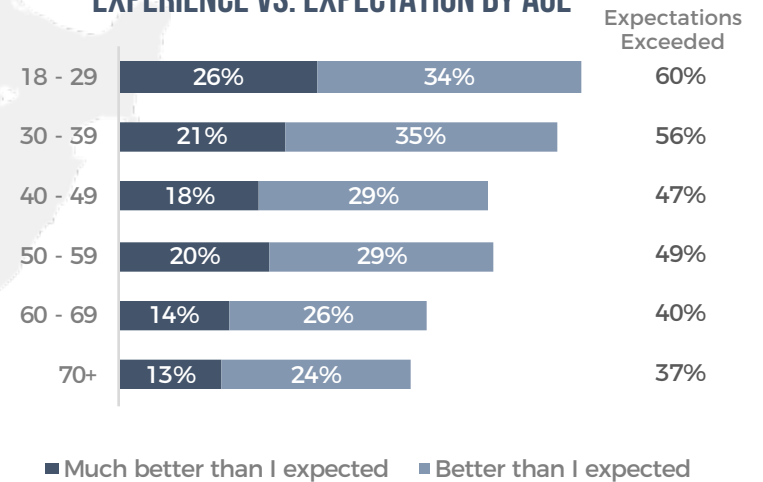
# EXPERIENCE VS. EXPECTATION

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

**49%** 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=2,183)

## DOMESTIC VISITOR SATISFACTION

# COMMENTS (Q1 2020)

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



"Looking at NZ with fresh eyes makes you appreciate how beautiful it is and how friendly we are."

"Very enjoyable relaxing holiday in a beautiful part of the country that I had not visited before."

"The motel that we stayed at was amazing."

"We had a wonderful time, dining out together with family and seeing a lot of sites and new places."

"Accommodation excellent, great weather and visited new places."

"Weather was great, beaches etc. weren't overcrowded, everyone was in a good mood."

"Because everywhere you go, New Zealand is just so beautiful and relaxing."

"We had a few things planned but we also found lots of different things to do on the way and it was a completely different experience to our day to day lives."

"Weather was great, locals were friendly, scenery was beautiful and food was great."

"Because we visited places that we hadn't done for about 30 years."

"With the new express highways and the work on the roads that had been done. Made the trip feel so much safer and faster."

"All our activities exceeded expectations as did accommodation. It was all very enjoyable and somewhere we had never been."

"It lived up to all that I imagined and more trips that we took while there were very professionally run (e.g. Milford Sounds, Walter Peak and many more)."

"We had the place to ourselves and the campsite was clean and close to a wild beach."

"Nelson is a place I've never been to and it was amazing to see the views and activities and I love Christchurch so that was a bonus."

"Beautiful scenery, safe and friendly, lots of great activities and so much fun."



"There is nothing exciting or different in the different parts of NZ and the cost of traveling, accommodation and food are far more expensive than most overseas destinations"

"Christchurch was a mess"

"We did a few touristy things that were really expensive and not worthy of the price. It was really embarrassing as a New Zealander."

"Many roadworks in transit"

"Staff at hotel not very nice"

"The room we stayed in was very tiny and had the kitchen/house staff underneath us."

"There wasn't as much to do in New Plymouth as expected."

"We had travel delays and extra accommodation and travel costs as a result."

"Christchurch is still recovering from the earthquakes."

"Road trip bad, busy roads, worse than expected."

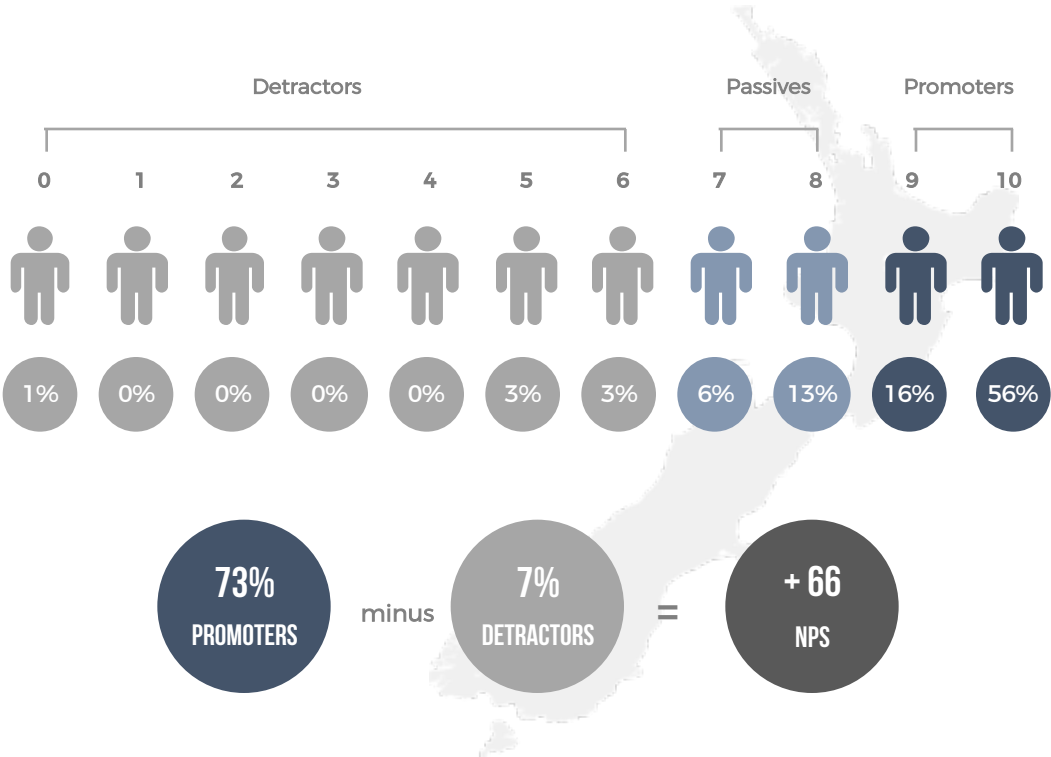


DOMESTIC VISITOR SATISFACTION

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 to others?

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	+ 59
30-39 years	+ 59
40-49 years	+ 63
50-59 years	+ 67
60-69 years	+ 73
70 years+	+ 79



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

YE March 2019: NPS + 68  
74% Promoters - 6% Detractors

Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,183)

## 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 April 2019 and 31 March 2020. The next update will be available in July.

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



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