

# DOMESTIC VISITOR SATISFACTION

Update: Year Ending September 2020

## DOMESTIC VISITOR SATISFACTION

# UPDATE: YEAR ENDING SEPTEMBER 2020

This report covers the year ending September 2020, including the initial national lockdown (March – May 2020) and the more recent Auckland lockdown (August – September 2020) when domestic travel was not permitted. Respondents are asked about their most recent domestic trip taken over the past 12 months so these lockdown periods are unlikely to have had much (if any) impact on the overall YE September 2020 data.

Within the past 12 months, three in four New Zealanders have taken an overnight domestic leisure trip, with 45 percent stating their main reason for the trip was for a holiday or short break and 35 percent to visit friends and family. The average length of trip was three nights.

New Zealanders continue to have positive domestic travel experience with an average overall satisfaction score of 8.7 out of ten. Consistent with the previous year, almost half of domestic travellers say that their expectations were exceeded on their most recent overnight trip. There continues to be a correlation between age and expectations, with younger respondents more likely to have their expectations exceeded.

The propensity to recommend New Zealand as a holiday destination for other New Zealanders is consistent with the previous year's score of +68.

An initial look at the data for domestic travel post-lockdown (May – September 2020) doesn't suggest there are any significant differences in the main reason for taking a trip, the length of trip or overall satisfaction. Qualitatively, New Zealanders do appear to be relieved to be able to reconnect with friends and family and to explore the country without the usual crowds of international visitors.



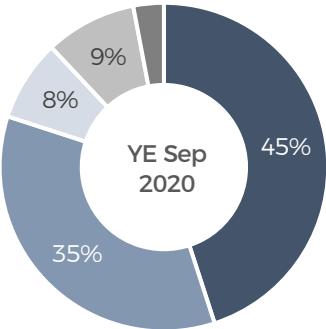
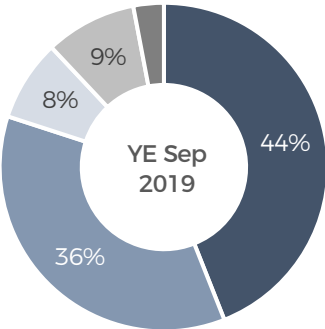
DOMESTIC VISITOR SATISFACTION

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 Sep 2019	YE Sep 2020
Length of Trip:		
1 Night	12%	14%
2 Nights	27%	26%
3 Nights	19%	19%
4 Nights	11%	11%
5 Nights	10%	9%
6 Nights	3%	3%
7 Nights (or more)	16%	18%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,151	n=2,162

## DOMESTIC VISITOR SATISFACTION

# PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

	YE Sep 2019	YE Sep 2020
Regions Visited:		
Auckland	23%	24%
Wellington	14%	14%
Northland	13%	11%
Taupo	11%	11%
Rotorua	12%	11%
Hamilton/Waikato (excluding Taupo and the Coromandel)	10%	10%
Bay of Plenty (excl. Rotorua)	10%	10%
Christchurch	11%	10%
The Coromandel	7%	8%
Canterbury (excl. Christchurch)	8%	8%
Hawke's Bay	7%	7%
Queenstown	7%	7%
Dunedin	5%	6%
Taranaki	5%	5%
Palmerston North & Manawātū	6%	5%
Nelson	4%	5%
Base: Total Sample	n=2,151	n=2,162

	YE Sep 2019	YE Sep 2020
Time of Year:		
January	16%	19%
February	11%	16%
March	12%	10%
April	12%	5%
May	8%	5%
June	8%	8%
July	8%	9%
August	9%	7%
September	9%	9%
October	9%	9%
November	8%	11%
December	10%	12%
Base: Total Sample	n=2,151	n=2,162

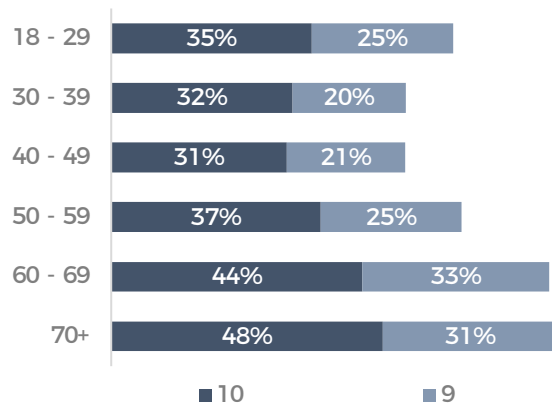
## DOMESTIC VISITOR SATISFACTION

# 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 September 2019	8.6	0%	0%	0%	1%	2%	4%	10%	25%	23%	34%	
Year Ending September 2020	8.7	0%	0%	0%	0%	1%	4%	10%	22%	25%	37%	

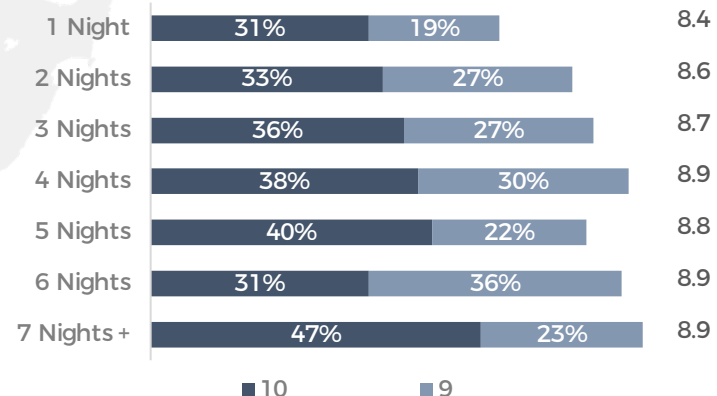
### SATISFACTION BY AGE



Average

8.6  
8.5  
8.4  
8.8  
9.1  
9.1

### SATISFACTION BY LENGTH OF TRIP



Average

8.4  
8.6  
8.7  
8.9  
8.8  
8.9  
8.9

Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,162)

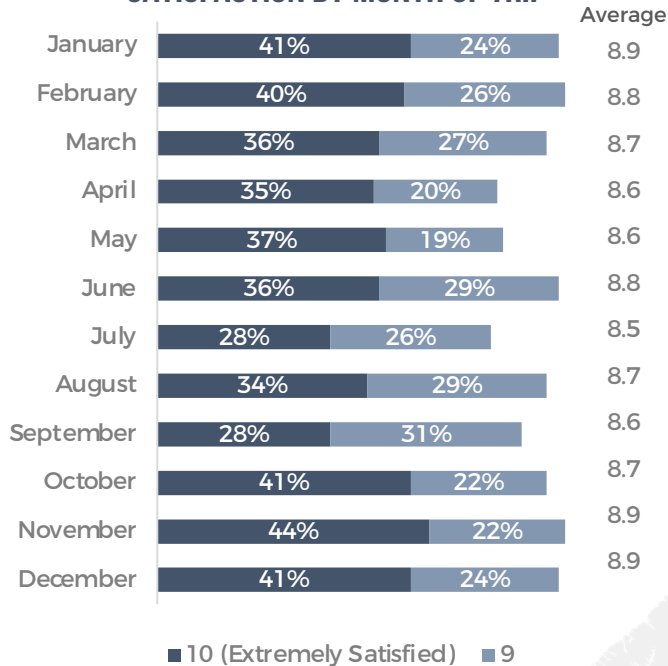


## DOMESTIC VISITOR SATISFACTION

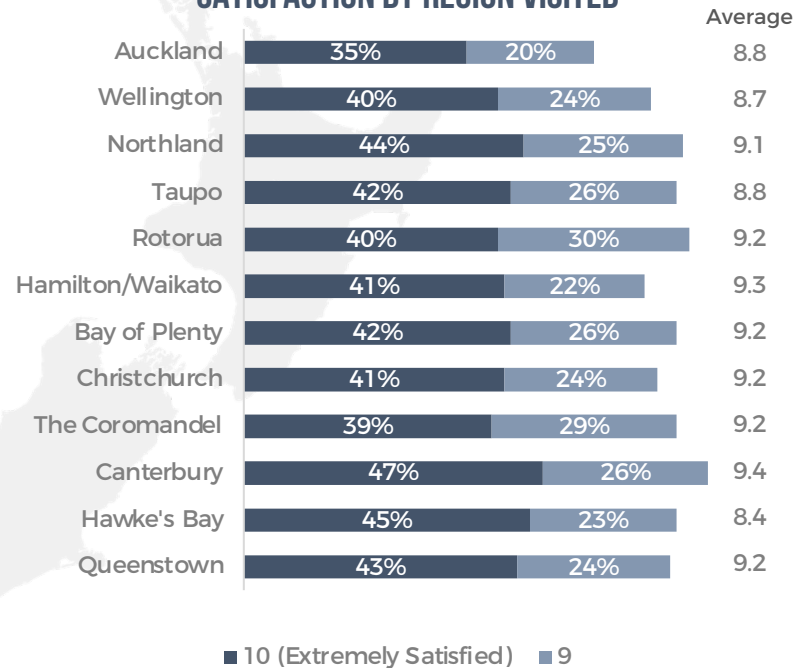
# OVERALL SATISFACTION

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



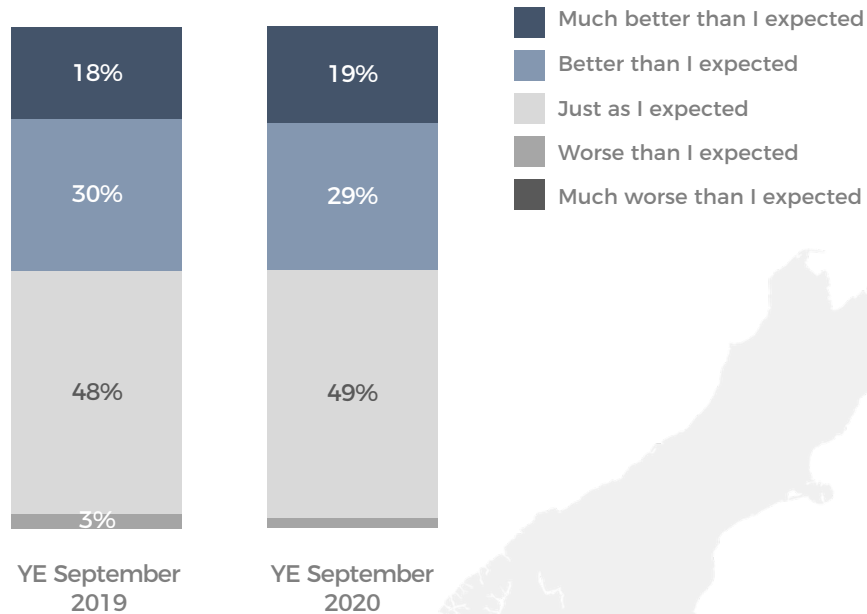
Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,162)

## DOMESTIC VISITOR SATISFACTION

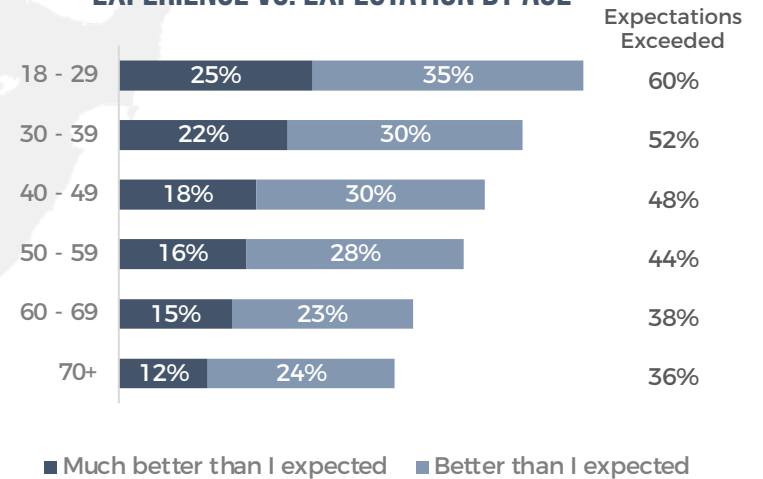
# EXPERIENCE VS. EXPECTATION

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=2,162)

## DOMESTIC VISITOR SATISFACTION

# COMMENTS (Q3 2020)

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



"Weather was nice and I was visiting many places for the first time such as Wellington Museum - those many experiences made me feel great"

"Service was incredible where we went and things turned out well. I made great friends, got free trips just for talking to locals, and had an overall enlightening and fun time on how kind people can be."

"it was a beautiful time to reconnect with friends"

"Place was not crowded, because no international visitors, and it was much nicer"

"Lovely hotel with friendly staff"

"it was great to be with family and friends after level 4 lockdown"

"We were traveling after they ban travellers coming to NZ, so it was not as crowded as last year"

"Accommodation was great; New Plymouth was a dynamic little city, and there were great walks in the beautiful National Park"

"Saw parts of the country we knew and explored others. Fascinated by the changes in Kaikoura and Christchurch. Loved catching up with friends and family and had great weather"

"It's relaxing to be away from home specially after a stressful lockdown"

"We had no idea what to expect, and the people were just so friendly and the costs to stay was within reason, as everyone warned us that it would be expensive to stay in Queenstown."

"Went to Picton, thought it was only for the ferry terminals but was surprised at how much I enjoyed the place"

"Visited museums that were excellent and free, beaches, cafe and restaurants that are clean"



"Accommodation was poor and the city is dirty"

"

"The Napier accommodation was substandard!!"

"There was no hospitality at the airport and in the city of Tauranga, I found them a rip off kind of people"

"Poor quality accommodation, lack of things to do"

"Poor kind of accommodations hotel at higher prices"

"My expectations of Eastland were high, but I found it a rather boring place to visit in winter. It may be better in warmer weather. Did not help that we could not access places like East Cape and the lighthouse because of road closures."

"In rainy weather not enough to do"

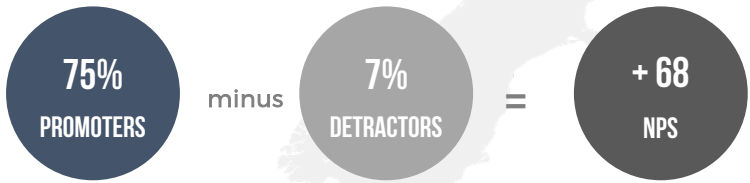
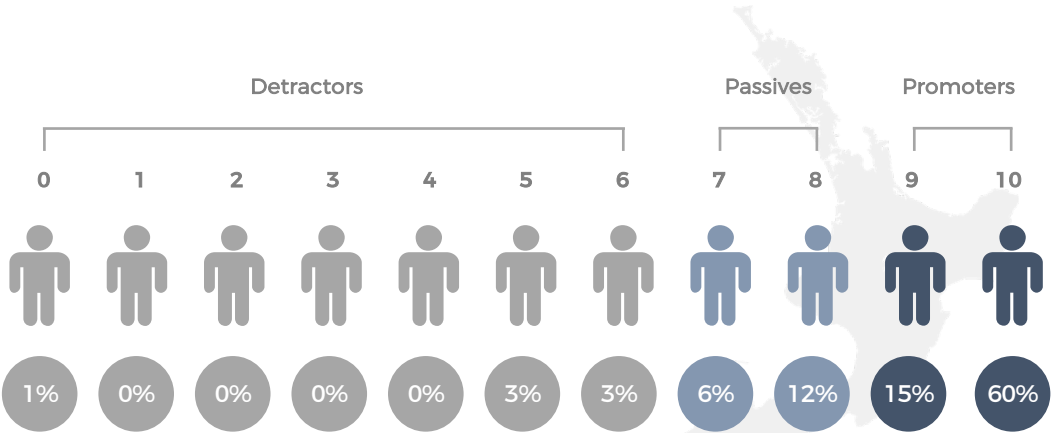


## DOMESTIC VISITOR SATISFACTION

# 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	+ 63
30-39 years	+ 59
40-49 years	+ 61
50-59 years	+ 68
60-69 years	+ 75
70 years+	+ 82

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

YE Sep 2019: NPS + 68  
73% Promoters - 5% Detractors

Base: NZ residents who have travelled domestically for leisure purposes within past 12 months (n=2,162)

## 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 October 2018 and 30 September 2020. The next update will be available in January 2021.

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



Tourism Industry Aotearoa  
Bruce Bassett  
[bruce.bassett@tia.org.nz](mailto:bruce.bassett@tia.org.nz)



Angus & Associates  
(04) 499 2212  
[vip@angusassociates.co.nz](mailto:vip@angusassociates.co.nz)

