

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING DECEMBER 2021

DOMESTIC VISITOR SATISFACTION (YE DECEMBER 2021)

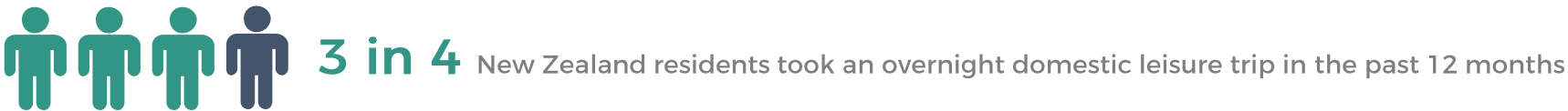
KEY INSIGHTS

This report provides an overview of New Zealanders' most recent domestic leisure trip (taken within the 12 months prior to their survey completion). The data presents an aggregate view from surveys completed between **January and December 2021** (meaning that the trip reported on may have taken place as far back as January 2020 or as recently as December 2021). The COVID-19 pandemic and associated lockdowns have impacted travel and tourism activity in New Zealand. Below are key insights for the survey year ending December 2021, in comparison with the previous year.

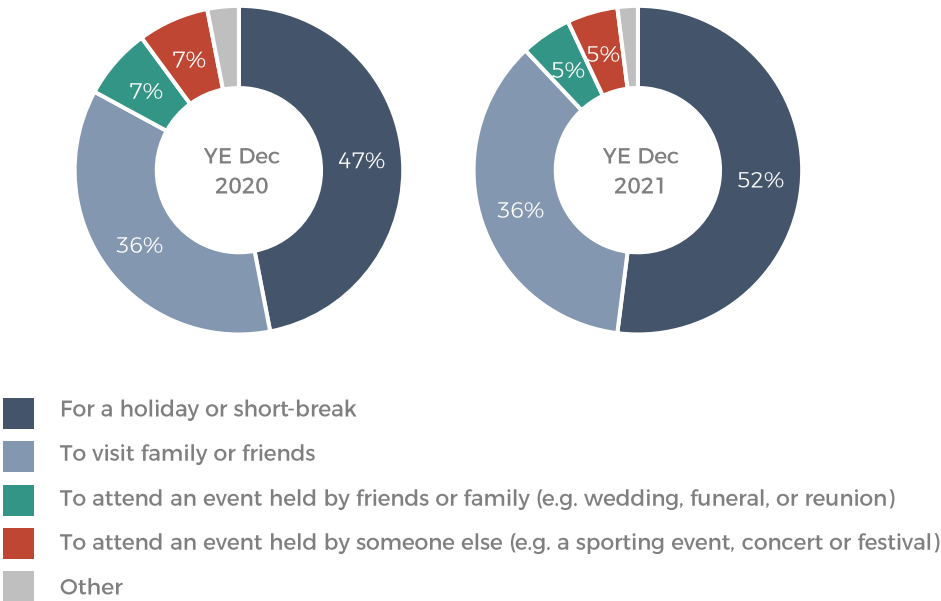
- Incidence of travel and reason for travel: The same proportion of New Zealanders, three out of four, took an overnight leisure trip however reasons for travelling have changed with a **lower proportion** of New Zealanders travelling to attend public and private **events** (down from 14% to 10%). This likely reflects the impact of the COVID-19 pandemic on the number and type of events staged during the survey period.
- Length of trip: There is no significant change in the length of trips undertaken. The median domestic leisure trip length is three nights.
- Destination market share: **Auckland** has experienced the largest **decline** in market share of domestic leisure trips - falling from 23% to 20%. Several factors are likely to have influenced this change such as a higher proportion of Aucklanders than usual visiting other regions, lockdowns specific to Auckland, and fewer event trips occurring. **Hamilton/Waikato** gained the most market share **rising** from 10% to 13%.
- Time of year: The proportion of trips made in **February** has **dropped** - from 16% to 12%, while the proportion made in **April** has **tripled** - from 4% to 12%. This shift was identified previously but it is not clear what is driving the change.
- Satisfaction: There is a slight **decrease** in overall satisfaction levels - 60% scored their satisfaction as 9 or 10 out of 10 in the most recent year compared to 64% in the previous year. Older New Zealanders and those on longer trips tend to be more satisfied than others.
- Experience vs Expectation: While satisfaction has decreased, there has been an **increase** in the proportion of New Zealanders that had their **expectations exceeded** on their most recent domestic overnight leisure trip - from 47% to 51%. In some cases expectations were exceeded due to low levels of visitor activity in a destination, and because a trip was enjoyable and 'hassle-free' despite the COVID-19 situation. While generally being less satisfied, exceeded expectations are more likely to occur amongst younger New Zealanders.
- Net Promotor Score: **NPS** is used to measure an individual's propensity to recommend New Zealand as a holiday destination for other New Zealanders. NPS has **fallen** compared with the previous year, from +66 to **+58**. It does however remain a high score (the available range is +100 to -100). The change in NPS is driven by a lower proportion of 'promoters', rather than any significant change in the proportion of 'detractors'. Like satisfaction, NPS is lower for younger New Zealanders (despite a higher proportion of this group reporting that their expectations were exceeded).

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

Thinking now about the last overnight trip that you have taken within New Zealand for leisure purposes...
(i.e. excluding trips taken for the primary purpose of business, education, stopover, medical treatment and other non-leisure purposes)



MAIN REASON FOR TRIP



	YE Dec 2020	YE Dec 2021
Length of Trip:		
1 Night	14%	13%
2 Nights	25%	25%
3 Nights	19%	20%
4 Nights	11%	11%
5 Nights	10%	9%
6 Nights	3%	3%
7 Nights (or more)	18%	20%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,196	n=2,244

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PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

Which region/s did you visit on your last overnight trip within New Zealand?
What time of year was your last overnight trip within New Zealand?

	YE Dec 2020	YE Dec 2021
Regions Visited (Top 15):		
Auckland	23%	20%
Wellington	13%	14%
Hamilton/Waikato (excluding Taupo and the Coromandel)	10%	13%
Christchurch	10%	12%
Rotorua	11%	12%
Northland	11%	12%
Bay of Plenty (excl. Rotorua)	11%	11%
Taupō	11%	11%
Queenstown	8%	10%
Canterbury (excl. Christchurch)	9%	9%
The Coromandel	8%	8%
Hawke's Bay	7%	7%
Palmerston North & Manawātū	6%	7%
Dunedin	5%	6%
Taranaki	5%	6%
Base: Total Sample	n=2,196	n=2,244

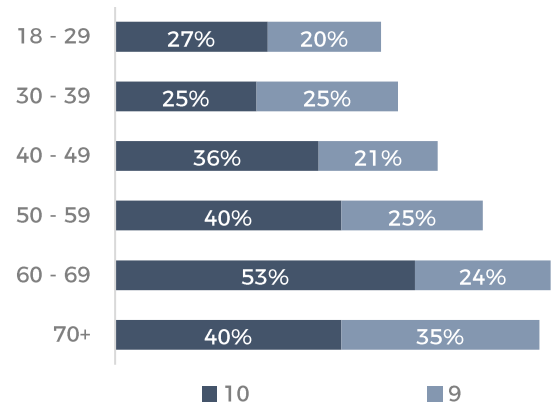
	YE Dec 2020	YE Dec 2021
Time of Year:		
January	19%	18%
February	16%	12%
March	8%	11%
April	4%	12%
May	5%	9%
June	8%	10%
July	9%	10%
August	7%	6%
September	9%	5%
October	11%	8%
November	10%	7%
December	12%	10%
Base: Total Sample	n=2,196	n=2,244

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 Dec 2020	8.7	0%	0%	0%	0%	1%	4%	10%	21%	26%	38%	
Year Ending Dec 2021	8.6	1%	0%	0%	0%	2%	4%	10%	23%	24%	35%	

SATISFACTION BY AGE



Average

8.3

8.4

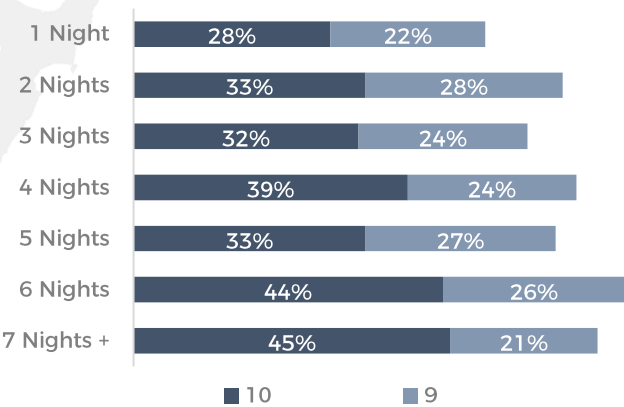
8.6

8.8

9.1

9.0

SATISFACTION BY LENGTH OF TRIP



Average

8.3

8.6

8.5

8.8

8.6

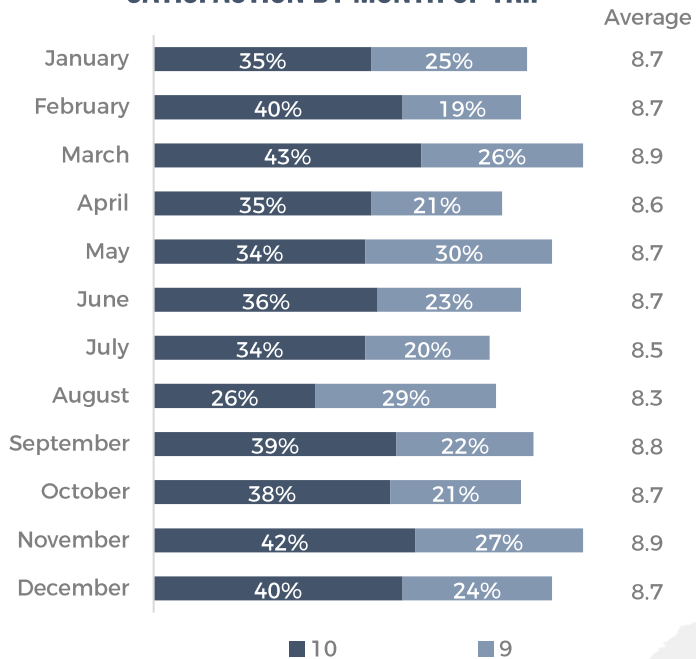
9.0

8.9

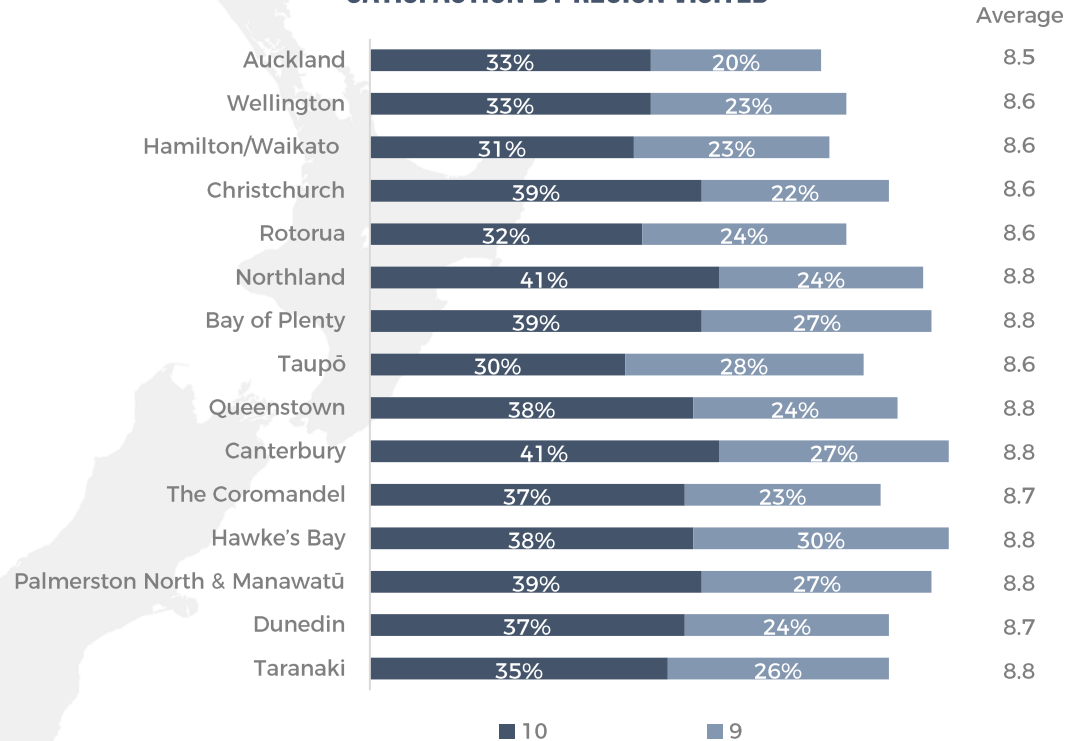
OVERALL SATISFACTION

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 *

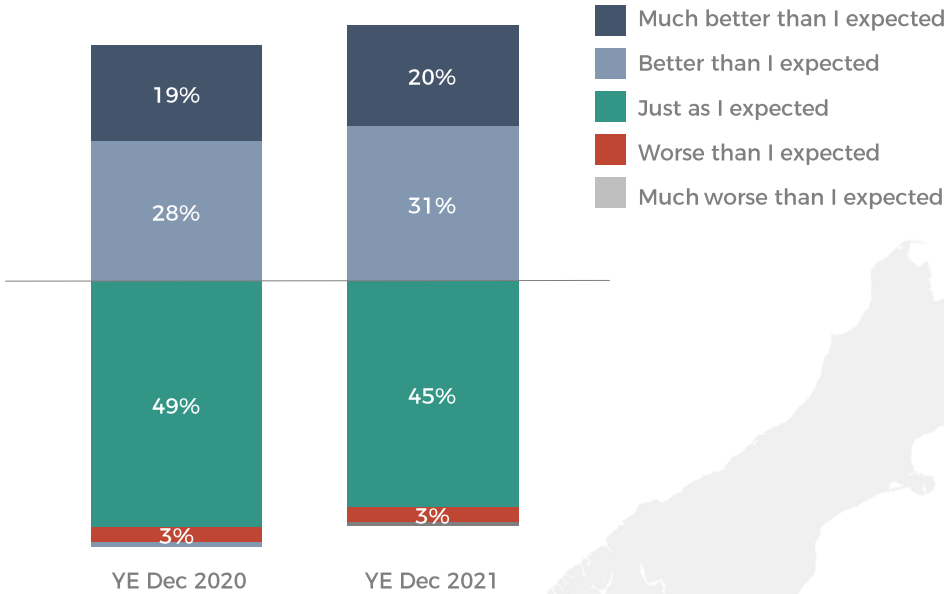


* Results for the 15 most commonly visited regions are displayed

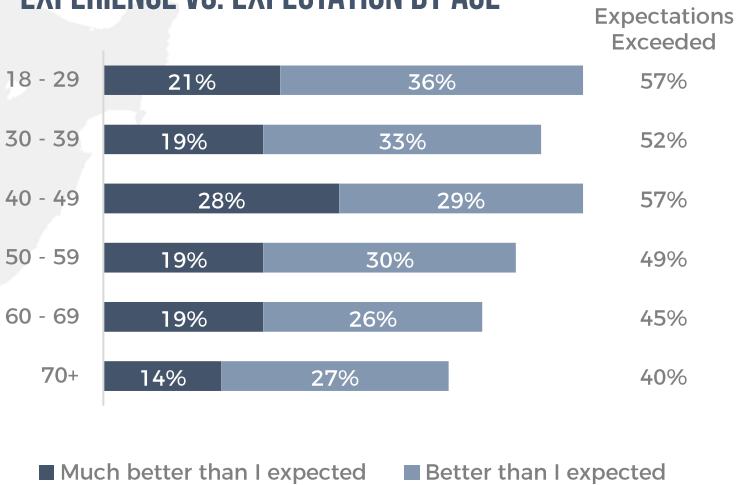
EXPERIENCE VS. EXPECTATION

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

51% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



EXPERIENCE VS. EXPECTATION BY AGE



COMMENTS (Q4 2021)

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



"Hotel was excellent, including meals, and very good value for money"

"We had the best kind of flight non eventful, car was upgraded, weather beautiful, roads empty, family well, food good when we ate out"

"Rotorua is that classic spot you go to once in a while if you live in the North Island, for the convenience. It's got the thrills you want and the relaxation activities sought after"

"Lots to do in Wellington. Great catching up with family"

"I have a really smooth travel experience throughout the entire trip. Weather was really good and the transportation process was very good. No traffic at all and had great company"

"Great room, great things to do and see in Mount Maunganui"

"Surprised to see that accommodation offered free EV charging"

"Lake Taupo is such a fabulous place to holiday - plenty to do on and around the lake at little or no cost. Taupo is clean and tidy and easy to get around"

"Road conditions were better than expected, drive times were consistent, friendly customer service found along our travels. Most public toilets were in a decent clean condition. Covid regulations and procedures were well laid out and the general public were generally well behaved"

"Due to covid I expected things to be very limited. However this wasn't the case, as long as guidelines such as wearing a facemask was followed it was the same"

"It was very enjoyable to get out and visit/stay with friends. Especially during covid"

"Less foreign tourists creating havoc on the roads made for very pleasant driving"



"The level of customer service in New Zealand is still very bad"

"Expensive attractions and meals and accommodation and very poor roads and large number of roadworks"

"Didn't get to go to Hamilton due to lockdown, but still got most of my trip in Tauranga. Terrible weather, there's not a lot to do in Tauranga if the weather is poor."

"Had to return home early due to covid"

"Air NZ is pathetic rude and does not provide meal"

"Everything is over priced in Queenstown and Wanaka"

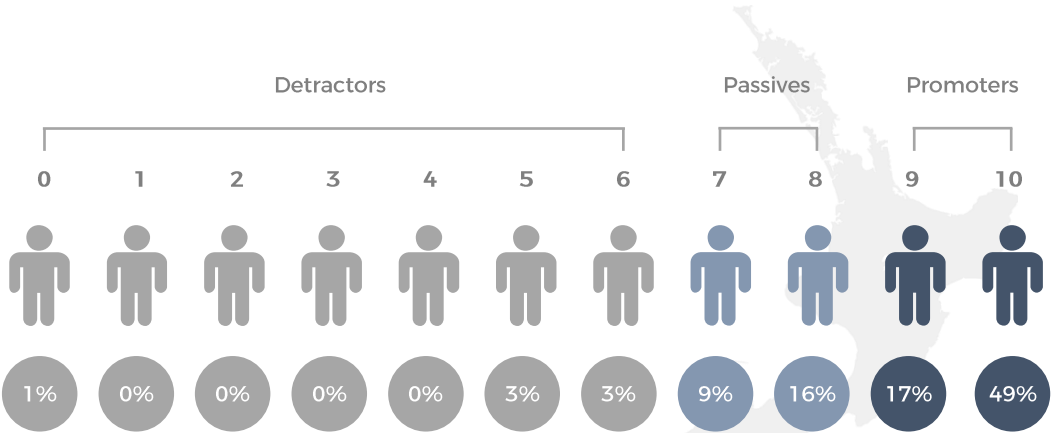
"Movement and freedom was limited due to the current pandemic."

"Lockdown decision on second day of trip so had to go home & swimming event we had travelled for was cancelled"

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	+ 44
30-39 years	+ 52
40-49 years	+ 53
50-59 years	+ 62
60-69 years	+ 76
70 years+	+ 78



There has been a substantial decline in the Net Promoter Score over the past year, driven by a lower proportion of promoters.

YE Dec 2020: NPS + 66
YE Dec 2021: NPS + 58

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DOMESTIC VISITOR SATISFACTION TRACKING

This report is based on data collected for the Domestic Visitor Satisfaction module of the Market Perceptions programme - a component of Angus & Associates' Visitor Insights Programme (VIP). The Visitor Insights Programme is an ongoing research programme revealing how New Zealanders and Australians think, feel and act about travel.

The Market Perceptions programme 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 and 31 December 2021. The next update will be available in April 2022.

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

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

