

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING DECEMBER 2022

KEY INSIGHTS



This report provides an overview of New Zealanders' most recent domestic leisure trip (taken during the 12 months prior to survey completion). The data presents an aggregate view from surveys completed between January 2022 and December 2022 (meaning that the trip reported on may have taken place as far back as January 2021 or as recently as December 2022). Below are key insights for the survey year ending December 2022. Comparisons are made with results from previous years where relevant.

Incidence of travel and reason for travel

Three in four New Zealanders took a domestic leisure trip during the survey period. While this proportion has been relatively stable over time, some change is evident in reason for travel. Compared with YE Dec 2019 and YE Dec 2020, the proportion of New Zealanders travelling for holidays/short-breaks is significantly higher, while the proportion travelling to attend public and private events is lower. This likely reflects changes in the market caused by the COVID-19 pandemic. Further monitoring will confirm if these changes halt as travel activity returns to a more normal pattern.

Length of trip

There is no significant change over time in the length of trips undertaken. The median length of domestic leisure trips is three nights.

Destination market share

Compared with YE Dec 2021, three regions in the North Island have experienced a significant decline in market share of domestic overnight leisure trips in the most recent year – Hamilton/Waikato (from 13% down to 10%), Rotorua (from 12% down to 10%) and Northland (from 12% down to 9%) – perhaps as visitors gain more confidence to travel further from their home following the peak of the COVID-19 pandemic. Auckland and Wellington are the regions most commonly visited, together accounting for one third of trips.

Time of the year

Recent results suggest that travel during the spring and summer period has reduced slightly in favour of autumn and winter travel.

KEY INSIGHTS CONT.



Satisfaction

A slight decrease in overall visitor satisfaction is evident in the year ending December 2022 - 55% scored their overall satisfaction with their experience on their last overnight trip as 9 or 10 out of 10 compared to 59% in YE Dec 2021 and 63% YE Dec 2020. Older New Zealanders continue to be more satisfied than younger New Zealanders, as do those taking longer trips.

Experience vs Expectation

Almost half of New Zealanders had their expectations exceeded on their most recent trip, and a similar proportion found it just as they expected. Only a very small proportion found it worse than expected. Sentiment is perhaps slightly more muted than it was in YE Dec 2021 – more in line with the two years before that. Accommodation, weather, service, scenery, transport, activities, shops and price are the factors that tend to influence experience.

Net Promoter Score (NPS)

NPS is used to measure an individual's propensity to recommend New Zealand as a holiday destination for New Zealanders. NPS has decreased in the past two years. It is currently +54, down from +58 in YE Dec 2021 and +66 in YE Dec 2020. Like satisfaction, NPS is lower for younger New Zealanders and higher for older New Zealanders.

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP



3 in 4 New Zealand residents travelled domestically for leisure in the past 12 months

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022
Main reason for trip				
For a holiday or short-break	44%	47%	52%	51%
To visit family or friends	35%	36%	36%	35%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	9%	7%	5%	6%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	9%	7%	5%	5%
Other	3%	3%	2%	3%
Base: Total sample	n=2,138	n=2,196	n=2,244	n=2,342

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022
Length of trip				
1 Night	13%	14%	13%	13%
2 Nights	28%	25%	25%	27%
3 Nights	19%	19%	20%	20%
4 Nights	11%	11%	11%	10%
5 Nights	10%	10%	9%	9%
6 Nights	3%	3%	3%	4%
7 Nights (or more)	16%	18%	20%	16%
Average Number of Nights (Median)	3	3	3	3
Base: Total Sample	n=2,139	n=2,196	n=2,244	n=2,342

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 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022
Regions Visited (Top 15):				
Auckland	23%	23%	20%	20%
Wellington	15%	13%	14%	13%
Queenstown	7%	8%	10%	11%
Hamilton/Waikato	10%	10%	13%	10%
Taupō	11%	11%	11%	10%
Bay of Plenty (excl. Rotorua)	11%	11%	11%	10%
Rotorua	13%	11%	12%	10%
Christchurch	11%	10%	12%	10%
Northland	13%	11%	12%	9%
Canterbury (excl. Christchurch)	8%	9%	9%	8%
The Coromandel	8%	8%	8%	7%
Hawke's Bay	7%	7%	7%	7%
Palmerston North & Manawatu	6%	6%	7%	6%
Taranaki	4%	5%	6%	5%
Dunedin	6%	5%	6%	5%
Base: Total Sample	n=2,138	n=2,196	n=2,244	n=2,342

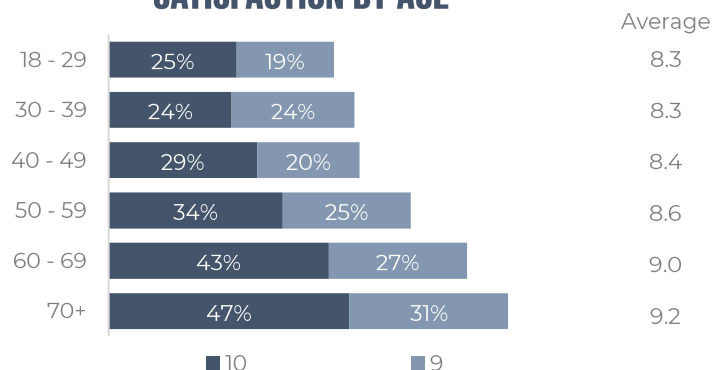
	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022
Time of Year:				
January	15%	19%	18%	16%
February	11%	16%	12%	11%
March	12%	8%	11%	11%
April	11%	4%	12%	11%
May	8%	5%	9%	9%
June	8%	8%	10%	9%
July	8%	9%	10%	10%
August	8%	7%	6%	7%
September	9%	9%	5%	7%
October	9%	11%	8%	6%
November	10%	10%	7%	7%
December	10%	12%	10%	9%
Base: Total Sample	n=2,138	n=2,196	n=2,244	n=2,342

OVERALL SATISFACTION

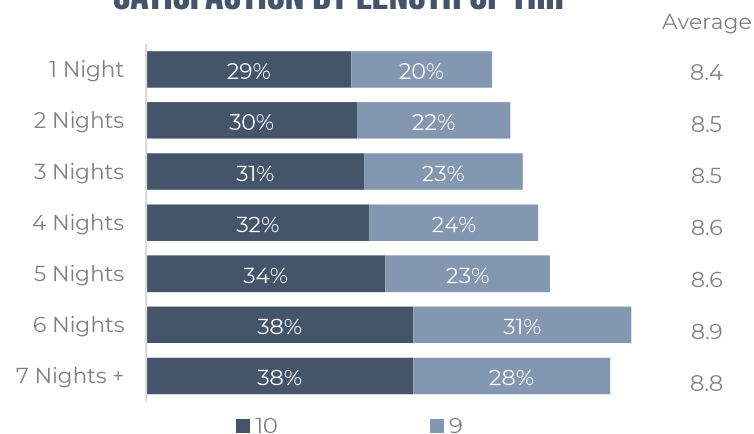
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022
10 (Extremely satisfied)	33%	37%	35%	32%
9	24%	26%	24%	23%
8	25%	21%	23%	26%
7	11%	10%	10%	11%
6	4%	4%	4%	4%
5	2%	1%	2%	2%
4	1%	0%	0%	0%
3	0%	0%	0%	1%
2	0%	0%	0%	0%
1 (Not at all satisfied)	0%	0%	1%	0%
Average	8.6	8.7	8.6	8.6
Base: Total Sample	n=2,138	n=2,196	n=2,244	n=2,342

SATISFACTION BY AGE



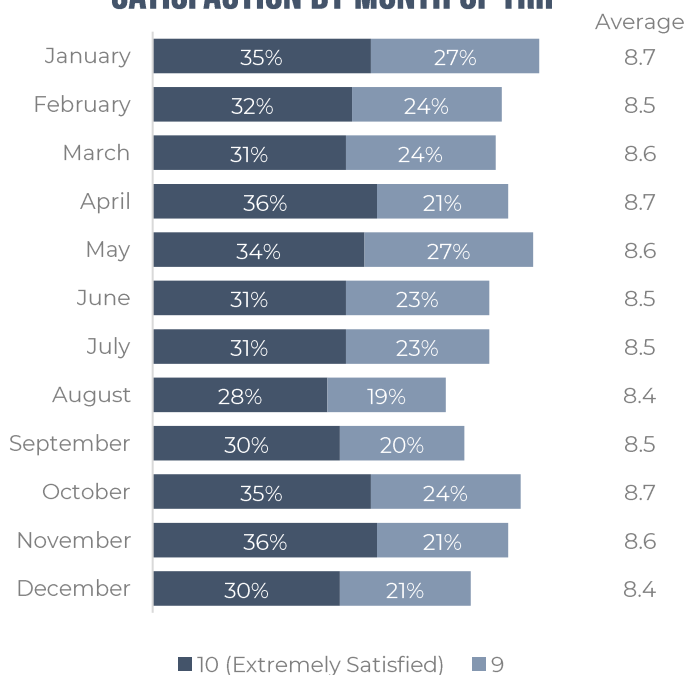
SATISFACTION BY LENGTH OF TRIP



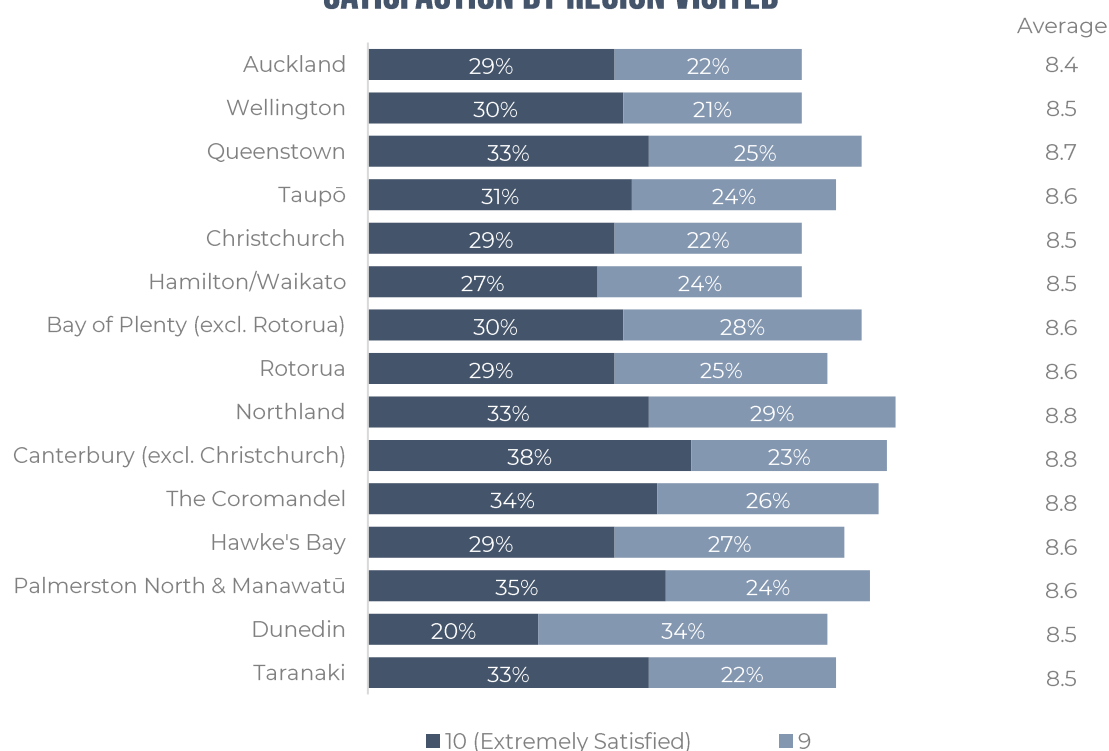
OVERALL SATISFACTION

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 *

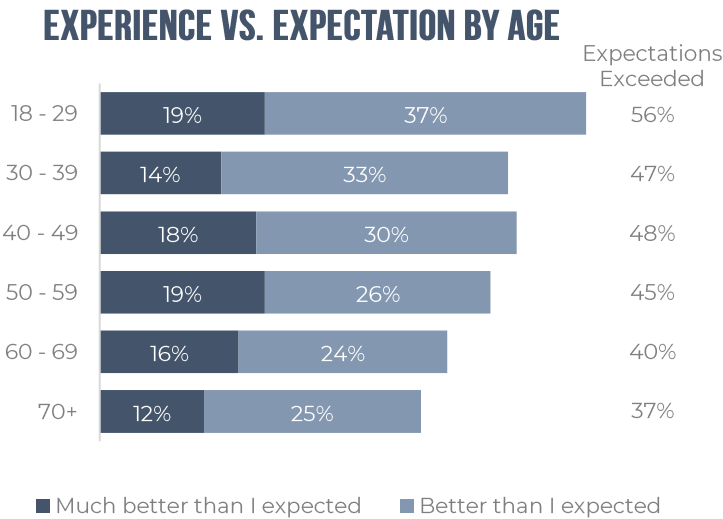
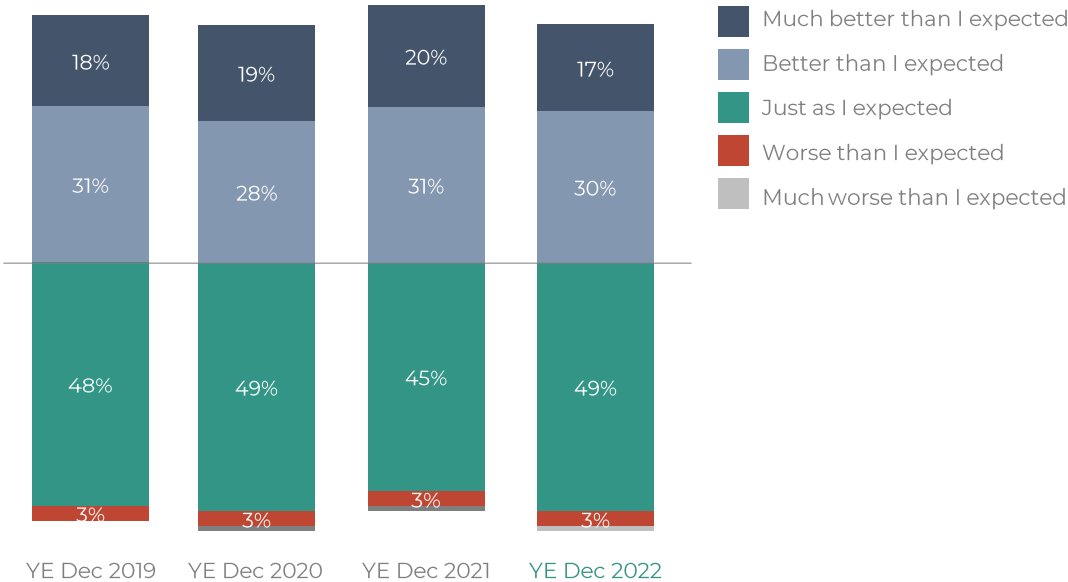


* Results for the 15 most commonly visited regions are displayed

EXPERIENCE VS. EXPECTATION

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

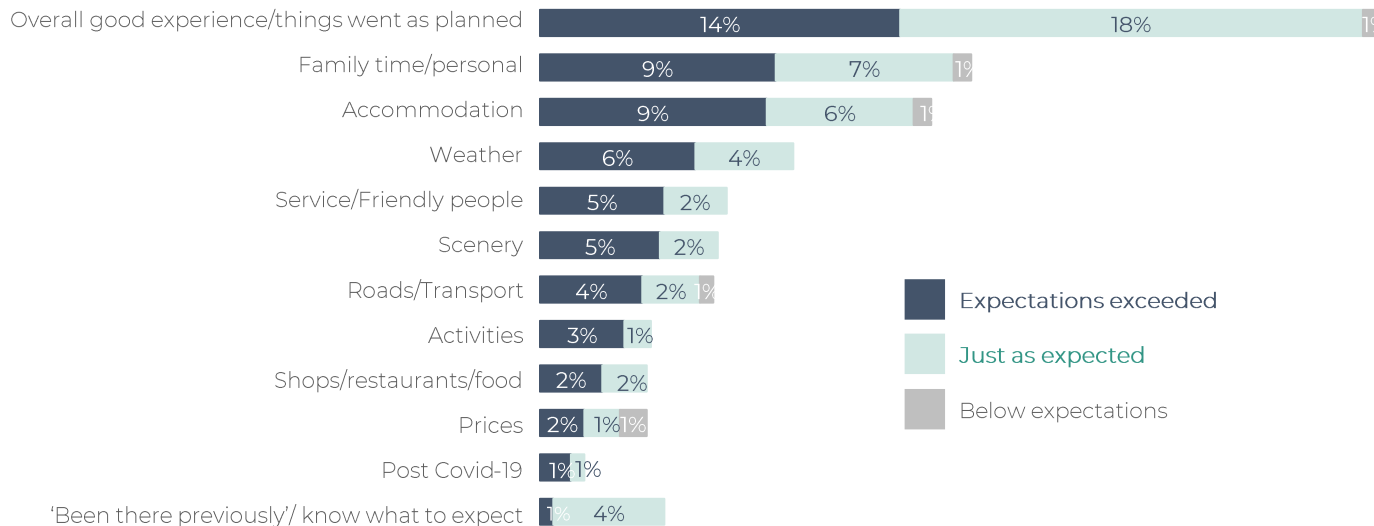
47% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



COMMENTS (Q4 2022)

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

Reasons for rating the overall experience



"Family visit went just as planned"

"I had a great time, (it) was super fun. I did a lot more things than I planned to do so overall was a great trip"

"Beautiful views, people there were welcoming and friendly"

"The concert was great, and the shops were fantastic"

"(We) had an awesome time, camping then having more money to spend on visiting attractions"

"Wellington was great, but my accommodation wasn't"

"Flights were expensive, but they were on time and got me to and from my destination safely"

"Have been there before. Beautiful scenery, beach, peaceful, relaxing. Roads are horrible but worth it."

"Everything felt more alive with tourists and the scenery was beautiful"

"I was happy with the number of shops and restaurants that were open"

"Have not been to Napier/Hastings for many years and we loved it. Plenty to do and excellent restaurants and wineries. Good traffic flow also all the way to Wellington and return thereafter."

"The road works were TERRIBLE-an extra 1 1/2 hours more than normal!!!"

"Good services and relaxing"

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.

		YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022
Promoters	10 (Extremely likely)	56%	58%	49%	46%
	9	16%	15%	17%	18%
Passive	8	13%	13%	16%	18%
	7	7%	6%	9%	8%
Detractors	6	3%	3%	3%	4%
	5	3%	3%	3%	3%
	4	0%	0%	0%	0%
	3	0%	0%	0%	1%
	2	0%	0%	0%	1%
	1	0%	0%	0%	0%
	0 (Not at all likely)	1%	1%	1%	1%
NPS		+65	+66	+58	+54
Base:		n=2,138	n=2,196	n=2,244	n=2,342

NPS BY AGE

18-29 years	+ 40
30-39 years	+ 48
40-49 years	+ 46
50-59 years	+ 60
60-69 years	+ 72
70 years+	+ 78

DOMESTIC VISITOR SATISFACTION (YE DECEMBER 2022)

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 over 5,000 New Zealand and Australian travellers are included in the programme each year, 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 January 2022 and December 2022. The next update will be available in April 2023.

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>

