

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING DECEMBER 2023

KEY INSIGHTS



This report examines domestic visitor satisfaction. It looks at the most recent domestic leisure trip taken by New Zealanders (taken during the 12 months prior to survey completion). The data presents an aggregate view from surveys completed between January 2023 and December 2023 (meaning that the trip reported on may have taken place as far back as January 2022 or as recently as December 2023). Below are key insights for the survey year ending December 2023. Comparisons are made with results from previous years where relevant.

Incidence of travel and reason for travel

Three in every four New Zealanders (73%) took a domestic trip within the past 12 months, for leisure purposes. This is similar to previous years, however, the reasons for travel have changed slightly, likely returning to pre-Covid patterns. 47% travelled domestically for a holiday or short break, lower than it has been for the past two years. Travel to visit family or friends has remained stable, while travel to attend an event either held by friends/family (e.g. weddings, funerals or reunions) or organized by someone else (e.g., sporting events, concerts or festivals) has increased to eight percent.

Length of trip

The median length of a domestic leisure trip is three nights, which has been stable over time. Nearly half of domestic travellers spent four nights or more away from home on their last overnight trip.

Destination market share

Auckland, Wellington, Hamilton/Waikato and Rotorua are the regions most likely to have been visited, together accounting for more than half of all recent domestic trips. Auckland is the most visited region and saw an increase in market share in 2023 after a decline in 2021 and 2022. Looking across the past five years, Northland and The Coromandel have seen a decline in market share.

KEY INSIGHTS (CONT.)



Satisfaction

Domestic visitor satisfaction remains high at 8.5 out of 10. However, there has been a decrease in the proportion of New Zealanders who are 'extremely satisfied' with their overall experience on their most recent trip (30% in YE Dec 2023, down from 32% in YE Dec 2022 and 35% in YE Dec 2021). Older New Zealanders continue to be more satisfied than younger New Zealanders, as do those taking longer trips (3+ nights).

Experience vs Expectation

Almost half of New Zealanders had their expectations exceeded on their most recent domestic trip and a similar proportion found it as they had expected. Only 3% found their most recent trip fell short of expectation – the proportion remaining steady across the last five years. Younger travellers, who are less likely to have travelled around New Zealand (compared to their older counterparts), are more likely to have their expectations exceeded.

Net Promoter Score (NPS)

Net Promoter Score (NPS) is used to measure an individual's propensity to recommend New Zealand as a holiday destination for New Zealanders. The NPS for New Zealand is currently +54, indicating that there are considerably more advocates for domestic travel than there are detractors. The most common reasons for the NPS scoring are the variety of things to do and visit, the natural environment/scenery and New Zealand being a beautiful country.

Over the last five years the Net Promoter Score has been slowly decreasing from a high of +65 in YE Dec 2019. However, it is positive that the NPS for YE Dec 2023 remains the same as it was for the previous year.

By age group, the NPS steadily increases from +40 for 18 to 29-year-olds, to +76 for over 70s.

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP



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

MAIN REASON FOR TRIP	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
For a holiday or short-break	44%	47%	52%	51%	47%
To visit family or friends	35%	36%	36%	35%	35%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	9%	7%	5%	6%	8%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	9%	7%	5%	5%	8%
Other	3%	3%	2%	3%	2%
Base: Total sample	n=2,138	n=2,196	n=2,244	n=2,342	n=2,401

LENGTH OF TRIP	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
1 Night	13%	14%	13%	13%	11%
2 Nights	28%	25%	25%	27%	26%
3 Nights	19%	19%	20%	20%	19%
4 Nights	11%	11%	11%	10%	12%
5 Nights	10%	10%	9%	9%	11%
6 Nights	3%	3%	3%	4%	4%
7 Nights (or more)	16%	18%	20%	16%	17%
Average Number of Nights (Median)	3	3	3	3	3
Base: Total Sample	n=2,139	n=2,196	n=2,244	n=2,342	n=2,401

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?

REGIONS VISITED (Top 14)	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
Auckland	23%	23%	20%	20%	25%
Wellington	15%	13%	14%	13%	14%
Hamilton/Waikato	10%	10%	13%	10%	12%
Rotorua	13%	11%	12%	10%	12%
Christchurch	11%	10%	12%	10%	11%
Taupō	11%	11%	11%	10%	11%
Bay of Plenty (excl. Rotorua)	11%	11%	11%	10%	10%
Queenstown	7%	8%	10%	11%	9%
Canterbury (excl. Christchurch)	8%	9%	9%	8%	9%
Northland	13%	11%	12%	9%	8%
Hawke's Bay	7%	7%	7%	7%	7%
The Coromandel	8%	8%	8%	7%	6%
Dunedin	6%	5%	6%	5%	6%
Palmerston North & Manawatū	6%	6%	7%	6%	5%
Base: Total Sample	n=2,138	n=2,196	n=2,244	n=2,342	n=2,401

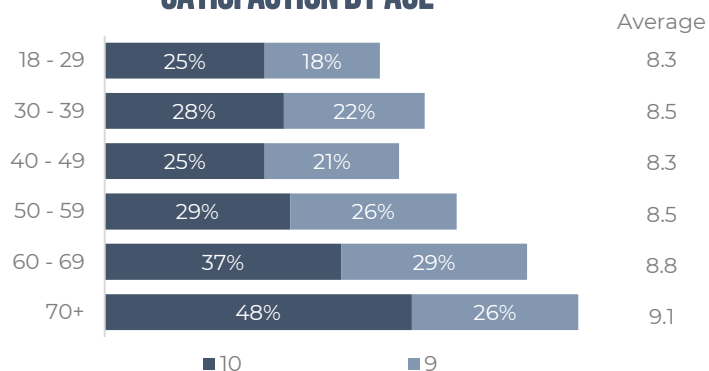
TIME OF YEAR	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
January	15%	19%	18%	16%	17%
February	11%	16%	12%	11%	12%
March	12%	8%	11%	11%	10%
April	11%	4%	12%	11%	11%
May	8%	5%	9%	9%	7%
June	8%	8%	10%	9%	7%
July	8%	9%	10%	10%	10%
August	8%	7%	6%	7%	7%
September	9%	9%	5%	7%	7%
October	9%	11%	8%	6%	9%
November	10%	10%	7%	7%	7%
December	10%	12%	10%	9%	10%
Base: Total Sample	n=2,138	n=2,196	n=2,244	n=2,342	n=2,401

OVERALL SATISFACTION

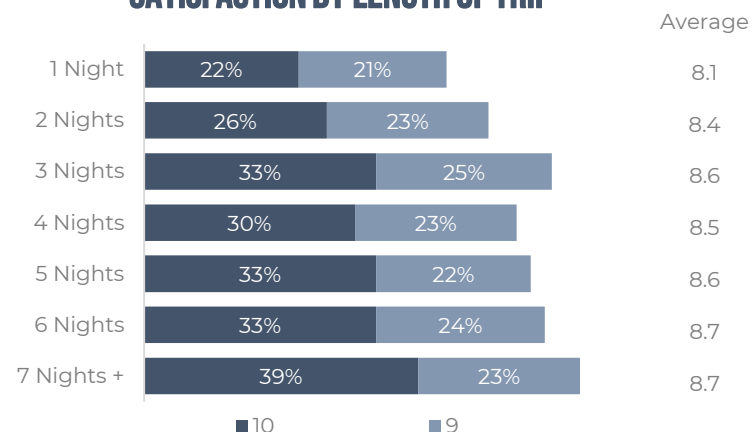
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE Dec 2019	YE Dec 2020	YE Dec 2021	YE Dec 2022	YE Dec 2023
10 (Extremely satisfied)	33%	37%	35%	32%	30%
9	24%	26%	24%	23%	23%
8	25%	21%	23%	26%	28%
7	11%	10%	10%	11%	12%
6	4%	4%	4%	4%	4%
5	2%	1%	2%	2%	2%
4	1%	0%	0%	0%	1%
3	0%	0%	0%	1%	0%
2	0%	0%	0%	0%	0%
1 (Not at all satisfied)	0%	0%	1%	0%	0%
Average	8.6	8.7	8.6	8.6	8.5
Base: Total Sample	n=2,138	n=2,196	n=2,244	n=2,342	n=2,401

SATISFACTION BY AGE



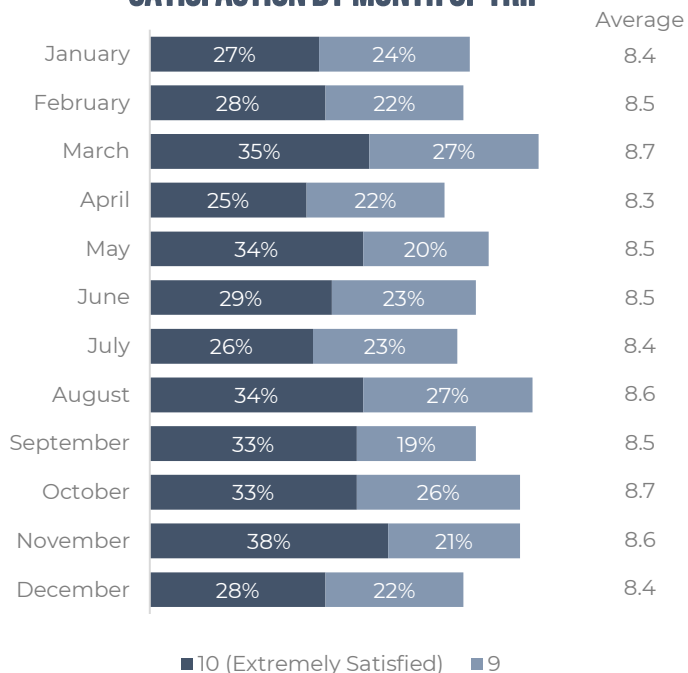
SATISFACTION BY LENGTH OF TRIP



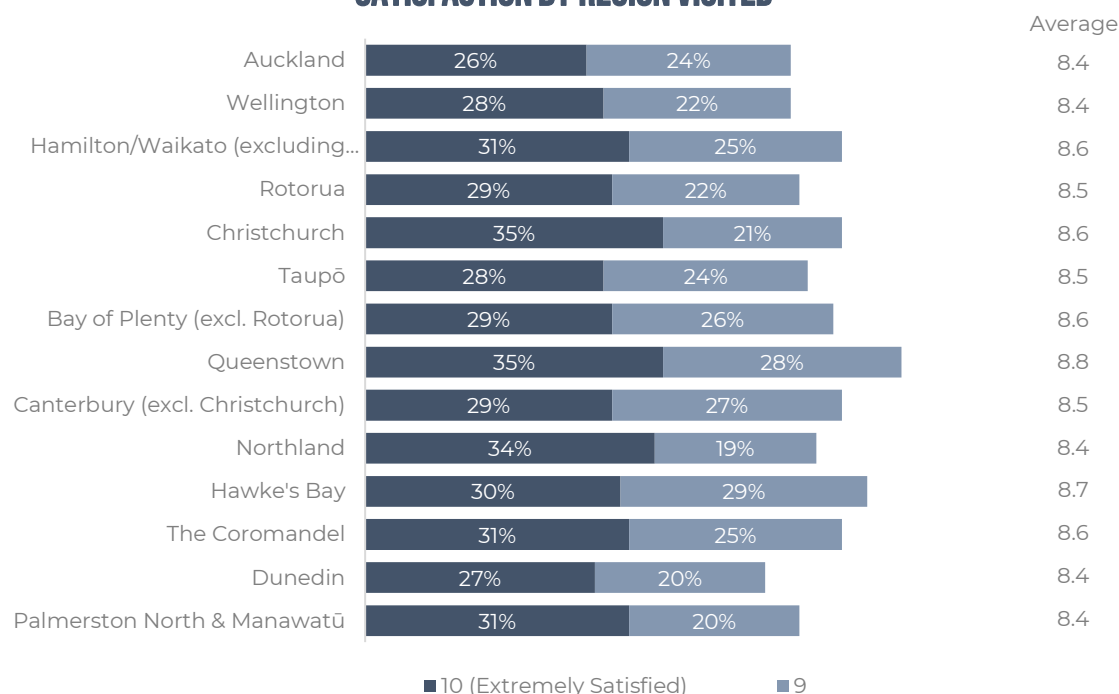
OVERALL SATISFACTION

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 *

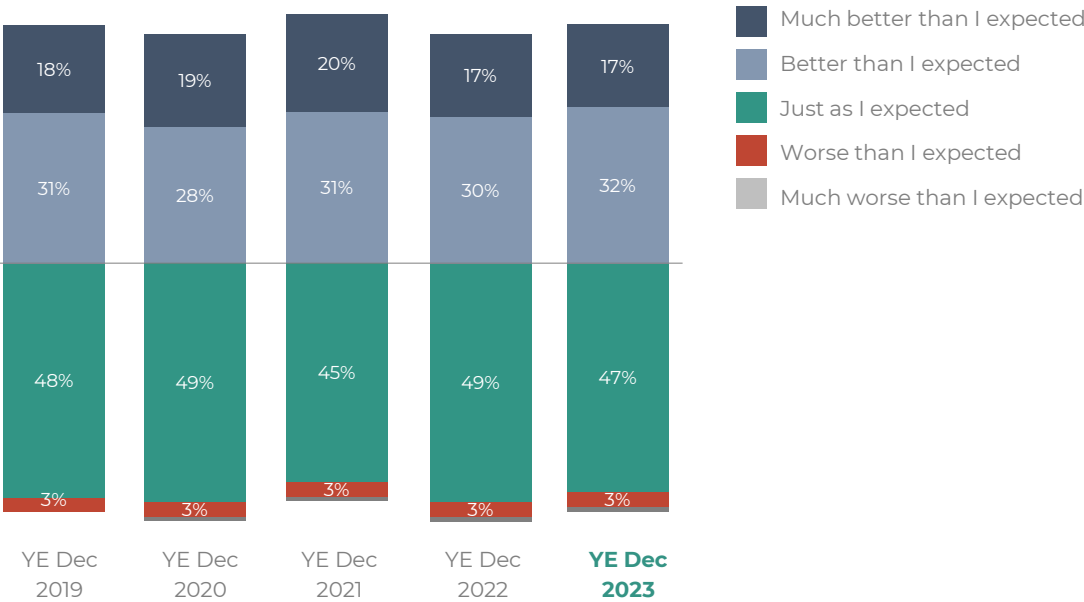


* Results for the 14 most commonly visited regions are displayed

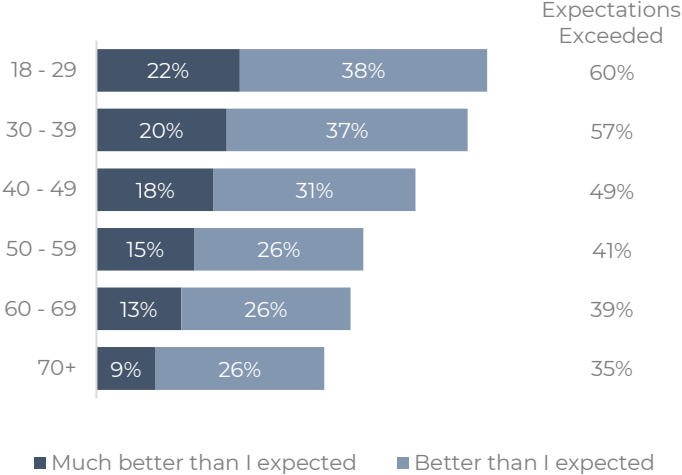
EXPERIENCE VS. EXPECTATION

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

49% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



EXPERIENCE VS. EXPECTATION BY AGE



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	YE Dec 2023
Promoters	10 (Extremely likely)	56%	58%	49%	46%	43%
	9	16%	15%	17%	18%	20%
Passive	8	13%	13%	16%	18%	20%
	7	7%	6%	9%	8%	9%
Detractors	6	3%	3%	3%	4%	4%
	5	3%	3%	3%	3%	3%
	4	0%	0%	0%	0%	0%
	3	0%	0%	0%	1%	0%
	2	0%	0%	0%	1%	0%
	1	0%	0%	0%	0%	0%
	0 (Not at all likely)	1%	1%	1%	1%	1%
NPS		+65	+66	+58	+54	+54
Base:		n=2,138	n=2,196	n=2,244	n=2,342	n=2,401

NPS BY AGE

18-29 years	+ 40
30-39 years	+ 48
40-49 years	+ 51
50-59 years	+ 59
60-69 years	+ 61
70 years+	+ 76

Themes from NPS comments	
Variety of things to do and visit	28%
Beautiful country	23%
Natural environment and scenery	23%
Great holiday/experience	9%
New Zealanders seeing their own home country	9%
Friendly and welcoming people	8%
Lovely/great country in the world	8%
Ease and accessibility	5%
Hospitality/food and beverage/customer service	5%
Pricing - too expensive	5%
Pricing - value for money	3%
Great beaches	3%
Weather	3%
Safe country	3%
Something for everyone	3%
Accommodation	2%
Relaxing break/getaway	2%
Not too busy or crowded	2%
Supporting the local economy	1%
Clean	1%
Transportation	1%
Crime concerns	1%
Other	1%
Base: Q4 2023	



angus & ASSOCIATES

POSITIVE COMMENTS

For what reason/s did you rate your likelihood to recommend New Zealand as a holiday destination to New Zealanders in that way?

"Because there is so much to see and do in NZ, beautiful scenery and places to suit all ages and interests. As they're saying, don't leave home until you see the country, we have so much to offer."

"It (New Zealand) has the world in one country - scenery, activities, sports, events, ,dining."

"The north and south island have something very different to offer, and both are picturesque, warm, friendly, offering adventure, excitement and relaxation to suit any travellers needs."

"It (New Zealand) is safe and interesting and affordable."

"You get to see all types of cultures and New Zealand is really accessible, friendly people and so much to see and do."

"Great beaches and comfortable motels."

"Stayed on Great Barrier Island which I had never visited before, and I was pleasantly surprised with the scenery and laid-back lifestyle. It was such a relaxing pleasant experience."

"Beautiful scenery, great trips on the sea, superb local restaurants and bars. A good range of accommodation."

"Easy place to visit, not overcrowded, plenty of choice of places to visit, a range of accommodation available and generally speaking, helpful and friendly people."

"NZ is beautiful and has lovely scenery, beaches and activities in both north and south islands. you have options for travel ranging from luxury to budget, vamping to adventure seeking."

"The weather turned out great but heaps of alternative things to do if weather is bad."

"(New Zealand is) safe, clean, beautiful, small."

"Because there's nothing better than exploring our backyard with all the nature and experiences to offer supporting the local businesses."

"New Zealand is full of raw beauty and experiences. Most people are welcoming and friendly. Dining options are plentiful and delicious."

"Breathtaking natural landscapes: New Zealand boasts stunning scenery, including majestic mountains, pristine beaches, and lush forests, making it an ideal destination for nature lovers and outdoor enthusiasts."

NEGATIVE COMMENTS

For what reason/s did you rate your likelihood to recommend New Zealand as a holiday destination to New Zealanders in that way?

"Hard to get around without a car. On the side of expensive in regard to value for accommodation and activities and quality of restaurant foods."

"New Zealand's extremely high cost of living makes travel expensive."

"Boring, expensive, difficult to get to places, always need a car for most of the things, lack of creativity, expensive hotel and dirty hostels, Expensive food, Market, petrol, taxi, ticket flights, car park is surreal (20nzd 30 minutes in Auckland), etc."

"Pretty good but very expensive with the cost-of-living soaring (and) some crime."

"Very unsafe roads and high prices and poor service."

"The only downside is the crime in places like the roads."

"Although the experience was good, I did notice Rotorua had elements of crime and unsavoury people wandering around."

"Extremely expensive. People (are) becoming less friendly."

"Only problem is accommodation is pretty expensive as compared to other countries."

"It's still a bit too vibrant for me, I prefer somewhere quieter."

"NZ is ok but there are many countries that have far more stunning scenery and amazing experiences to do."

"Plenty of interesting places, good scenery etc. but loses some points because of high costs."

"It (NZ) is a great place with scenery, but it is expensive."

"Trip itself was fantastic but just the distance was too far."

"Good access to nature and city, but cost of living is too expensive."

"We have amazing places to see in our own country. The only downside is it can be expensive, especially travel such as bus travel, and air travel"

DOMESTIC VISITOR SATISFACTION (YE DECEMBER 2023)

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 and December 2023. The next update will be available in April 2024.

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>

