

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING JUNE 2021

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This report provides an overview of New Zealanders' most recent domestic leisure trip taken within the past 12 months prior to survey completion. The data presents an aggregate view from surveys completed between July 2020 and June 2021 (meaning that the trip reported on may have taken place as far back as July 2019 or as recently as June 2021). As such some travel experiences will have been impacted by the nationwide COVID-19 lockdown period that occurred during March - May 2020, and the subsequent Auckland lockdowns that occurred during August - September 2020 and February 2021.

In the past 12 months the same number of New Zealanders, three out of four, took an overnight trip however the reasons for travelling have changed with fewer New Zealanders travelling to attend an event (17% to 11%), whether it be a public or private event. This may be reflective of Covid lockdowns affecting the number of events available during the survey periods.

Auckland has seen the largest decline in market share of leisure trips falling from 25% to 21%. There are several factors that can impact this such as more Aucklanders visiting other regions, lockdowns specific to Auckland and fewer event trips. Bay of Plenty (excluding Rotorua) and Queenstown gained the most market share rising from 9% to 12% and 6% to 9% respectively.

There has been no significant change in the time of year travelled or the length of the trips undertaken.

Satisfaction levels have improved slightly with 62% of New Zealanders scoring their satisfaction levels as 9 or 10 out of 10. Older New Zealanders and those on longer trips tend to be more satisfied than others.

Despite satisfaction levels increasing, the Net Promoter Score (NPS) that measures an individual's propensity to recommend New Zealand as a holiday destination for other New Zealanders has fallen gradually since the survey's inception in 2018. From 70 down to 63. This remains a very high score (the available range is +100 to -100)

Following the emergence of COVID-19 in New Zealand, some changes in travel behaviour and propensity to recommend New Zealand as a travel destination have been observed. Comparing data collected in the nine months ending June 2021 with the equivalent nine months ending June 2020 shows:

- A decline in travel to Auckland and an increase in travel to Queenstown, Canterbury and Palmerston North/Manawatū
- A decline in event related travel (10% down from 18%)
- An increase in expectations being exceeded (53% up from 49%)
- A decline in the Net Promoter Score (+59 down from +68)

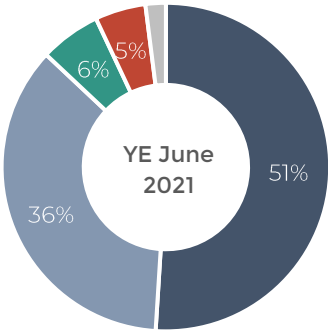
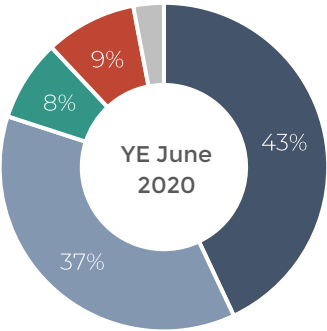
PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

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)



3 in 4 New Zealand residents took an overnight domestic leisure trip in 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 June 2020	YE June 2021
Length of Trip:		
1 Night	14%	14%
2 Nights	26%	24%
3 Nights	19%	20%
4 Nights	10%	11%
5 Nights	10%	9%
6 Nights	3%	3%
7 Nights (or more)	18%	18%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,170	n=2,232

DOMESTIC VISITOR SATISFACTION (YE JUNE 2021)

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 June 2020	YE June 2021
Regions Visited (Top 15):		
Auckland	25%	21%
Wellington	14%	14%
Christchurch	10%	12%
Hamilton/Waikato (excluding Taupo and the Coromandel)	11%	12%
Rotorua	12%	11%
Bay of Plenty (excl. Rotorua)	9%	12%
Taupō	12%	10%
Northland	13%	11%
Canterbury (excl. Christchurch)	10%	10%
Queenstown	6%	9%
Hawke's Bay	7%	8%
The Coromandel	9%	8%
Palmerston North & Manawātū	5%	7%
Dunedin	6%	7%
Taranaki	5%	6%
Base: Total Sample	n=2,170	n=2,232

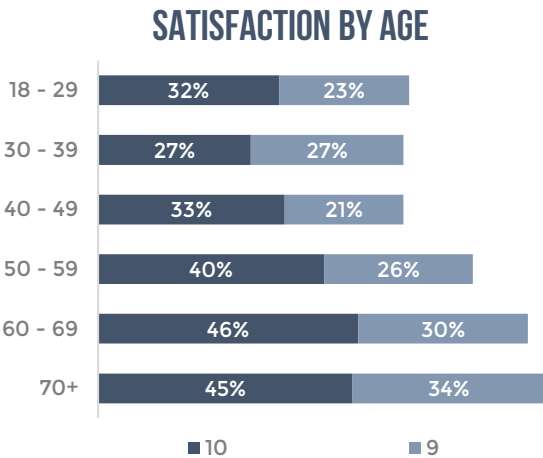
	YE June 2020	YE June 2021
Time of Year:		
January	18%	19%
February	14%	14%
March	10%	9%
April	7%	8%
May	7%	6%
June	8%	8%
July	8%	8%
August	8%	6%
September	9%	8%
October	9%	11%
November	10%	9%
December	12%	12%
Base: Total Sample	n=2,170	n=2,232

DOMESTIC VISITOR SATISFACTION (YE JUNE 2021)

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 June 2020	8.7	0%	0%	0%	1%	2%	4%	10%	22%	24%	36%
Year Ending June 2021	8.8	0%	0%	0%	0%	1%	4%	10%	22%	26%	36%



Average

8.6

8.4

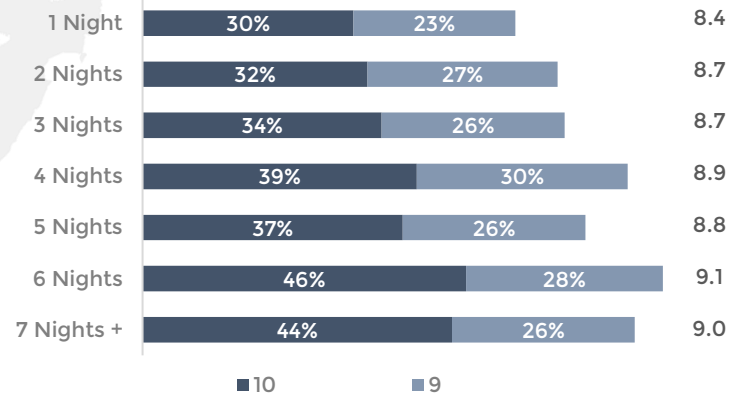
8.5

8.8

9.1

9.1

SATISFACTION BY LENGTH OF TRIP



Average

8.4

8.7

8.7

8.9

8.8

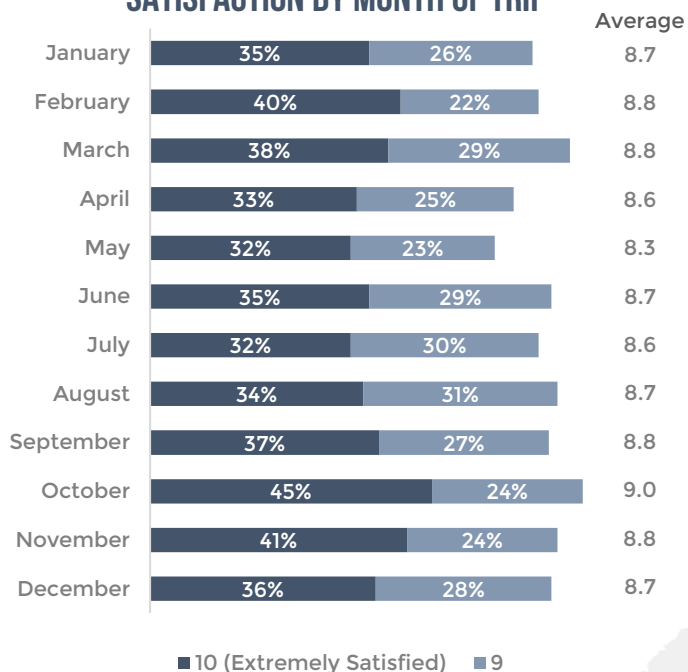
9.1

9.0

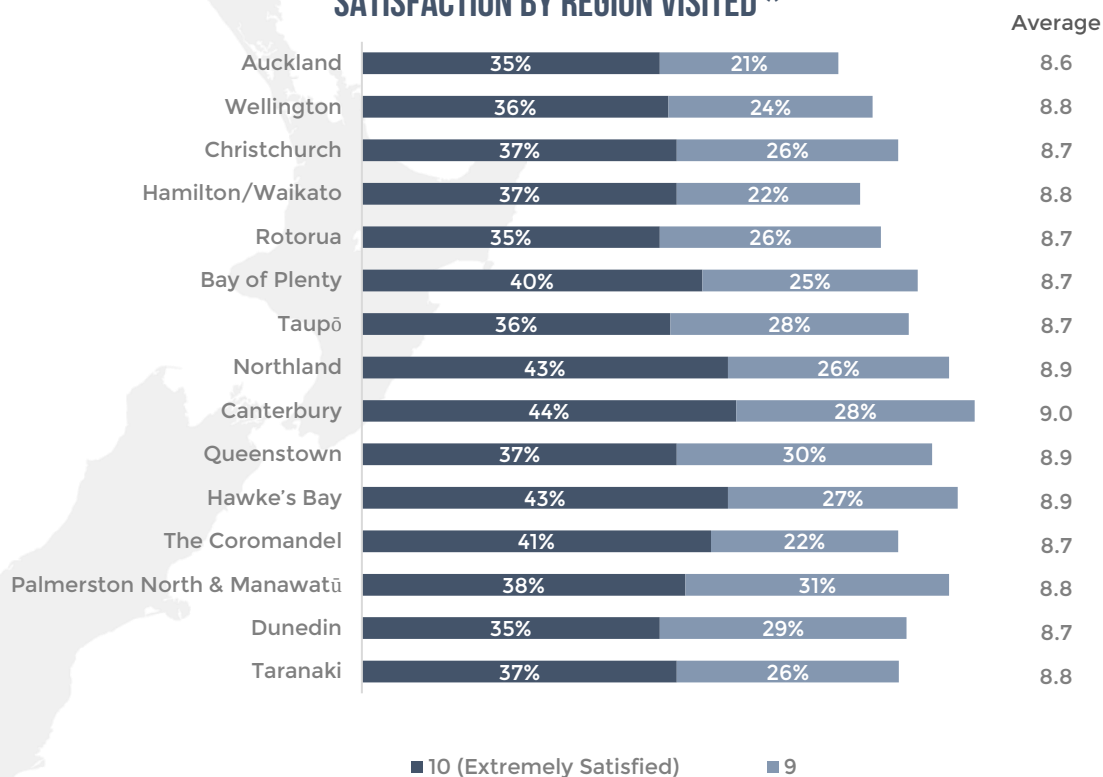
OVERALL SATISFACTION

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 *

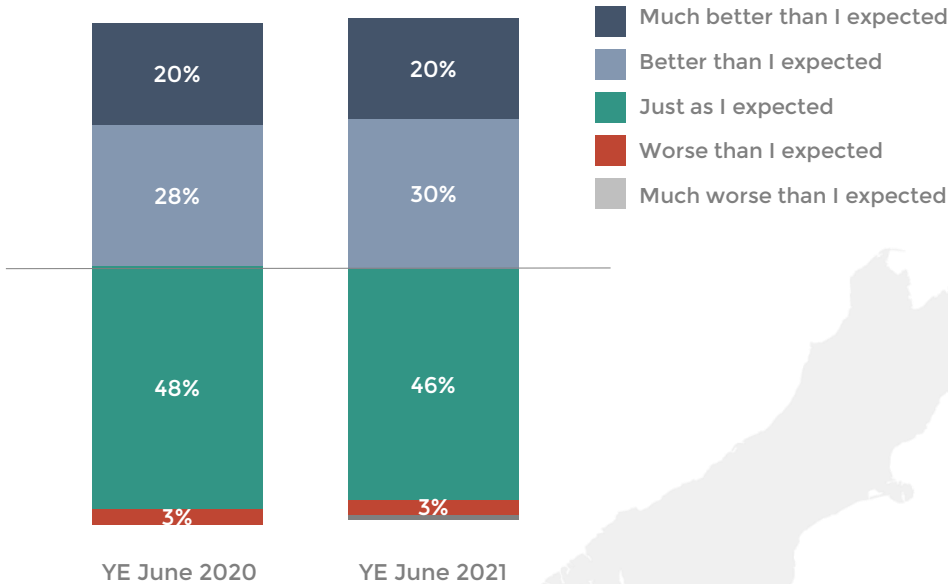


* Included are the 15 most commonly visited regions

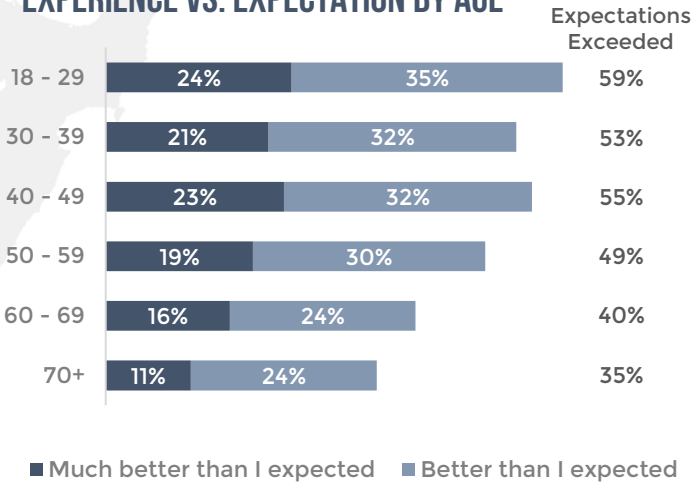
EXPERIENCE VS. EXPECTATION

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

50% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



EXPERIENCE VS. EXPECTATION BY AGE



COMMENTS (Q2 2021)

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



"There is lots to do in Tauranga and I could have stayed longer. I plan to go back over summer to this area."

"it just felt amazing to get out of Auckland with family and friends and just enjoy our country one city at a time"

"I really enjoyed sightseeing through Central Otago. It was beautiful and I went to some places I hadn't been before. I had high expectations and they were met."

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

"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 Six60 concert and spent time with family and friends it was awesome"

"Went with extended family and there was plenty for all ages."

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

"Shopping, Restaurant, sky city and accommodation all up to expectations"

"it's a shame a lot of things were not open on Stewart island. but I really enjoyed it despite the rain ;) plus we had kiwis in the garden."

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



"It was ok, some good things and some boring things"

"The accommodation was terrible"

"Accommodation in NZ is extremely expensive & not value for money"

"There were no motel rooms available for me to rest"

"Poor hotel booking process, too expensive, not enough staff or facilities within the local restaurants etc, ski field couldn't cope with the amount of people."

"The advertising was better than what we find"

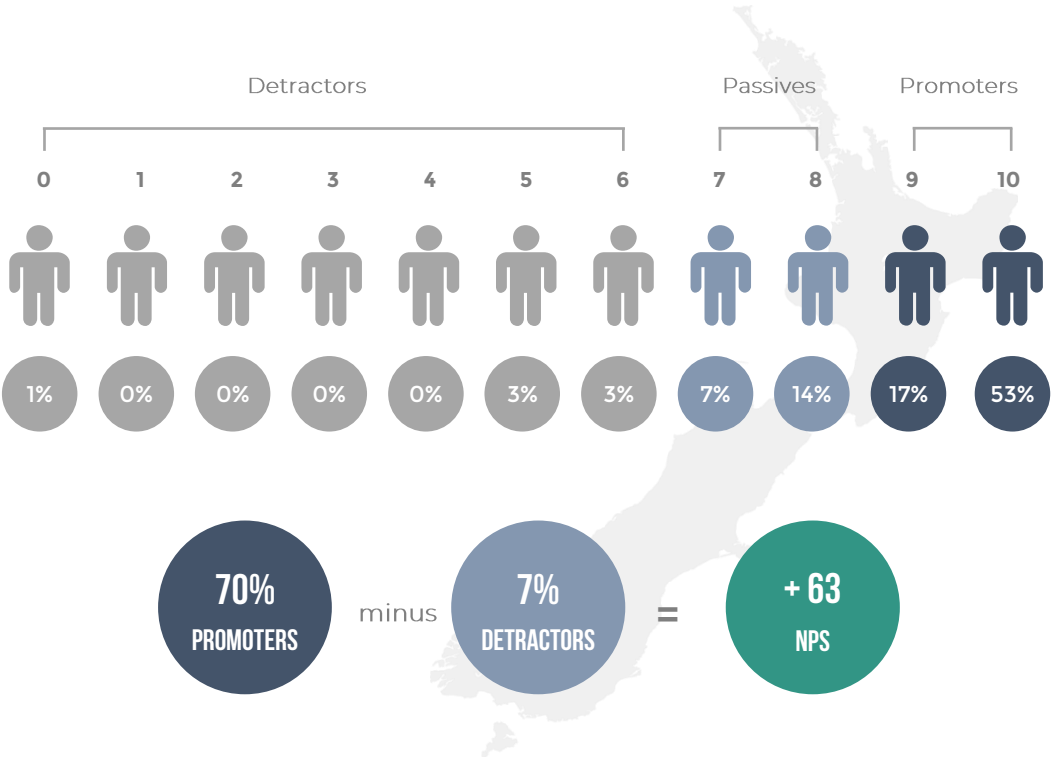
"Bad service, restaurant was closed at an early time, couldn't get to the hot pools because the key card given did not work"

DOMESTIC VISITOR SATISFACTION (YE JUNE 2021)

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	+ 54
30-39 years	+ 55
40-49 years	+ 51
50-59 years	+ 69
60-69 years	+ 76
70 years+	+ 78



There has been a slow decline in the Net Promoter Score over the past three years

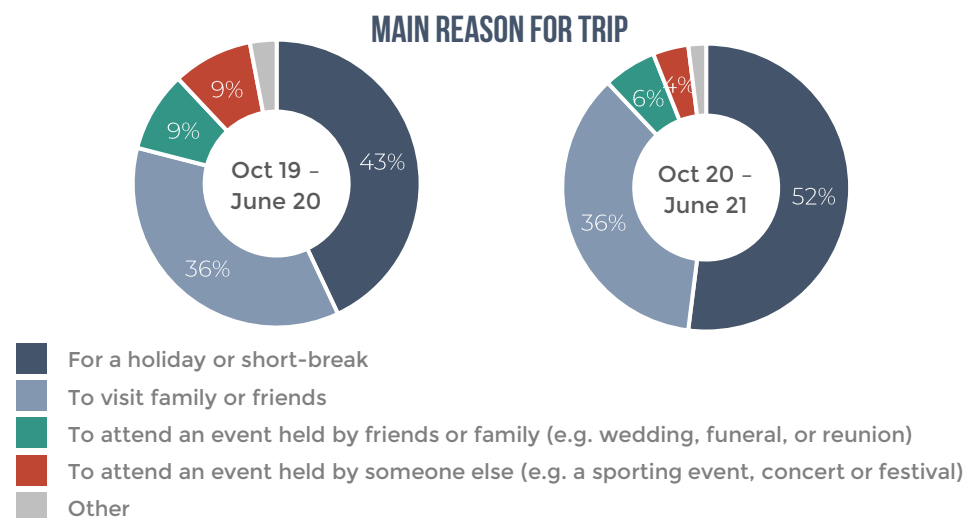
6 Mths Jan – June 2018: NPS +70
YE June 2019: NPS + 68
YE June 2020: NPS + 67
YE June 2021: NPS + 63

DOMESTIC VISITOR SATISFACTION

CHANGES IN DOMESTIC TRAVEL BEHAVIOUR

Following the emergence of COVID-19, changes in domestic travel behaviour and satisfaction are being closely monitored. The following two slides provide an overview of data collected during the October 2020 – June 2021 period, which has been compared with the same period the preceding year.

	Oct 19 – June 20	Oct 20 – June 21
Regions Visited (Top 15):		
Auckland	24%	20%
Wellington	14%	14%
Christchurch	10%	12%
Hamilton/Waikato (excluding Taupo and the Coromandel)	11%	13%
Northland	12%	12%
Rotorua	11%	11%
Bay of Plenty (excl. Rotorua)	9%	11%
Canterbury (excl. Christchurch)	8%	10%
Taupo	11%	10%
Queenstown	6%	10%
Hawke's Bay	7%	8%
Palmerston North & Manawatu	5%	7%
The Coromandel	9%	8%
Dunedin	6%	7%
Taranaki	5%	6%
Base: Total Sample	n=1,621	n=1,691



	Oct 19 – June 20	Oct 20 – June 21
Length of Trip:		
1 Night	14%	14%
2 Nights	25%	23%
3 Nights	19%	20%
4 Nights	11%	11%
5 Nights	9%	9%
6 Nights	3%	3%
7 Nights (or more)	19%	19%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=1,621	n=1,691

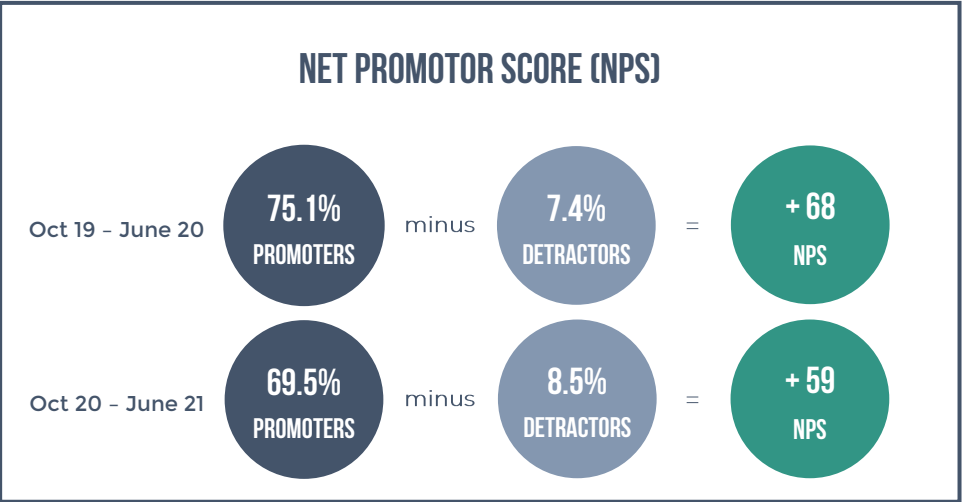
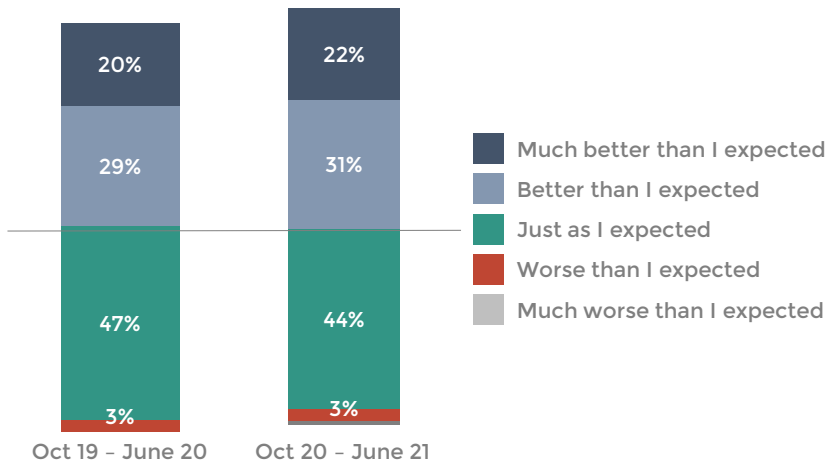
DOMESTIC VISITOR SATISFACTION

CHANGES IN DOMESTIC TRAVEL

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

		Not at all satisfied						Extremely satisfied				
	Average	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	
Oct 2019 – June 2020	8.8	0%	0%	0%	0%	2%	4%	10%	21%	25%	38%	
Oct 2020 – June 2021	8.8	0%	0%	0%	0%	2%	4%	9%	21%	26%	37%	

53% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



DOMESTIC VISITOR SATISFACTION (YE JUNE 2021)

DOMESTIC VISITOR SATISFACTION TRACKING

Angus & Associates is an independent research and strategy consultancy specialising in the tourism and leisure sectors. The Visitor Insights Programme (VIP) is our ongoing programme revealing how New Zealand's visitors think, feel and act.

The Market 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 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 July 2020 and 30 June 2021. The next update will be available in October 2021.

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

Angus & Associates
(04) 499 2212
vip@angusassociates.co.nz

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

