

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING JUNE 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 **July 2021** and **June 2022** (meaning that the trip reported on may have taken place as far back as July 2020 or as recently as June 2022). Below are key insights for the survey year ending June 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 June 2019 and YE June 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 the impact of the COVID-19 pandemic on the number and type of events staged during the survey period, as well as the decreased ability of New Zealanders to holiday overseas.

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 June 2021, two regions in the South Island have experienced a decline in market share of domestic overnight leisure trips – Canterbury (from 10% down to 8%) and Dunedin (from 7% down to 5%).

While there hasn't been significant change compared with the preceding year, three North Island regions have experienced a decline in market share compared to earlier years - Auckland (currently 20%, down from 25% in YE June 2020), Rotorua (currently 11%, down from 13% in YE June 2019) and Northland (currently 10%, down from 13% in YE June 2019 and YE June 2020).

Queenstown has experienced an increase in market share and currently sits at 11%.

Satisfaction

A slight decrease in overall satisfaction is evident - 57% scored their overall satisfaction with their experience on their last overnight trip as 9 or 10 out of 10 in the most recent year compared to 62% in YE June 2021, 60% in YE June 2020 and 59% in YE June 2019. Older New Zealanders continue to be more satisfied than younger New Zealanders, as do those taking longer trips.

KEY INSIGHTS (CONT.)

Experience vs Expectation

Almost half of New Zealanders had their expectations exceeded on their most trip, and a similar proportion found it just as they expected. Only a very small proportion found it worse than expected. There is little change over time in these proportions. Factors that tend to influence experience include transport, accommodation, sense of value received and service levels.

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 each year since YE June 2019. It is currently +56, down from +68 in YE June 2019. The change in NPS is being driven by a lower proportion of 'promoters' and a slight increase in the proportion of 'detractors'. 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 Jun 2019 | YE Jun 2020 | YE Jun 2021 | YE Jun 2022 |
|--|----------------|----------------|----------------|----------------|
| Main reason for trip | | | | |
| For a holiday or short-break | 46% | 43% | 51% | 52% |
| To visit family or friends | 34% | 37% | 36% | 36% |
| To attend an event held by friends or family (e.g. wedding, funeral, or reunion) | 8% | 8% | 6% | 6% |
| To attend an event held by someone else (e.g. a sporting event, concert or festival) | 9% | 9% | 5% | 4% |
| Other | 2% | 3% | 2% | 2% |
| Base: Total sample | n=2,127 | n=2,170 | n=2,232 | n=2,270 |

| | YE Jun 2019 | YE Jun 2020 | YE Jun 2021 | YE Jun 2022 |
|-----------------------------------|----------------|----------------|----------------|----------------|
| Length of Trip | | | | |
| 1 Night | 13% | 14% | 14% | 12% |
| 2 Nights | 27% | 26% | 24% | 27% |
| 3 Nights | 20% | 19% | 20% | 20% |
| 4 Nights | 11% | 10% | 11% | 10% |
| 5 Nights | 10% | 10% | 9% | 9% |
| 6 Nights | 3% | 3% | 3% | 4% |
| 7 Nights (or more) | 16% | 18% | 18% | 18% |
| Average Number of Nights (Median) | 3 | 3 | 3 | 3 |
| Base: Total Sample | n=2,127 | n=2,170 | n=2,232 | n=2,270 |

DOMESTIC VISITOR SATISFACTION (YE JUNE 2022)

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 Jun 2019 | YE Jun 2020 | YE Jun 2021 | YE Jun 2022 |
|----------------------------------|----------------|----------------|----------------|----------------|
| Regions Visited (Top 15): | | | | |
| Auckland | 22% | 25% | 21% | 20% |
| Wellington | 14% | 14% | 14% | 13% |
| Hamilton/Waikato | 10% | 11% | 12% | 11% |
| Taupō | 11% | 12% | 10% | 11% |
| Bay of Plenty (excl. Rotorua) | 10% | 9% | 12% | 11% |
| Rotorua | 13% | 12% | 11% | 11% |
| Christchurch | 11% | 10% | 12% | 11% |
| Queenstown | 8% | 6% | 9% | 11% |
| Northland | 13% | 13% | 11% | 10% |
| The Coromandel | 8% | 9% | 8% | 8% |
| Canterbury (excl. Christchurch) | 9% | 7% | 10% | 8% |
| Hawke's Bay | 7% | 7% | 8% | 7% |
| Palmerston North & Manawātū | 6% | 5% | 7% | 7% |
| Taranaki | 5% | 5% | 6% | 5% |
| Dunedin | 5% | 6% | 7% | 5% |
| Base: Total Sample | n=2,127 | n=2,170 | n=2,232 | n=2,270 |

| | YE Jun 2019 | YE Jun 2020 | YE Jun 2021 | YE Jun 2022 |
|----------------------|----------------|----------------|----------------|----------------|
| Time of Year: | | | | |
| January | 17% | 18% | 19% | 17% |
| February | 12% | 14% | 14% | 12% |
| March | 11% | 10% | 10% | 11% |
| April | 12% | 7% | 8% | 11% |
| May | 9% | 7% | 6% | 9% |
| June | 8% | 8% | 8% | 10% |
| July | 7% | 8% | 8% | 10% |
| August | 8% | 8% | 6% | 6% |
| September | 9% | 9% | 8% | 4% |
| October | 9% | 9% | 11% | 6% |
| November | 9% | 10% | 9% | 6% |
| December | 10% | 12% | 12% | 9% |
| Base: Total Sample | n=2,127 | n=2,170 | n=2,232 | n=2,270 |

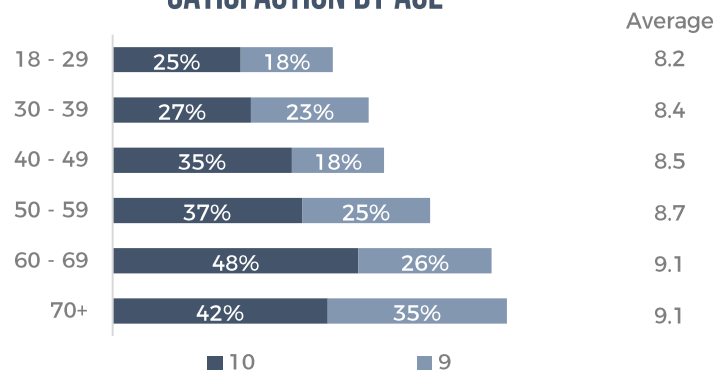
DOMESTIC VISITOR SATISFACTION (YE JUNE 2022)

OVERALL SATISFACTION

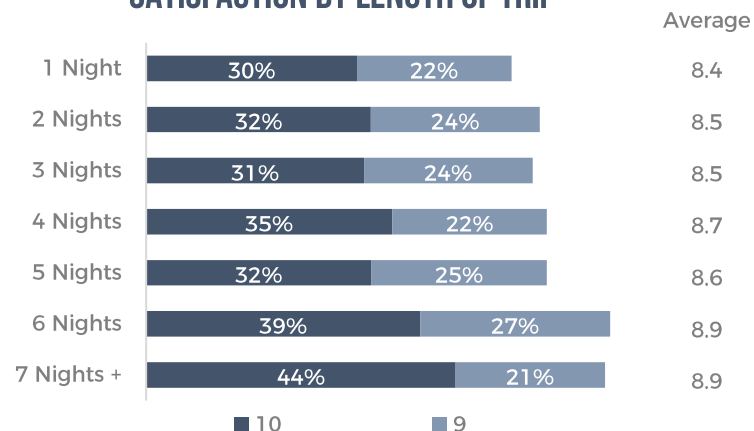
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

| | YE Jun 2019 | YE Jun 2020 | YE Jun 2021 | YE Jun 2022 |
|--------------------------|----------------|----------------|----------------|----------------|
| 10 (Extremely satisfied) | 36% | 36% | 36% | 34% |
| 9 | 23% | 24% | 26% | 23% |
| 8 | 25% | 22% | 22% | 25% |
| 7 | 10% | 10% | 10% | 10% |
| 6 | 3% | 4% | 4% | 4% |
| 5 | 2% | 2% | 1% | 2% |
| 4 | 1% | 1% | 0% | 1% |
| 3 | 0% | 0% | 0% | 0% |
| 2 | 0% | 0% | 0% | 0% |
| 1 (Not at all satisfied) | 0% | 0% | 0% | 0% |
| Average | 8.7 | 8.7 | 8.7 | 8.6 |
| Base: Total Sample | n=2,127 | n=2,170 | n=2,232 | n=2,270 |

SATISFACTION BY AGE



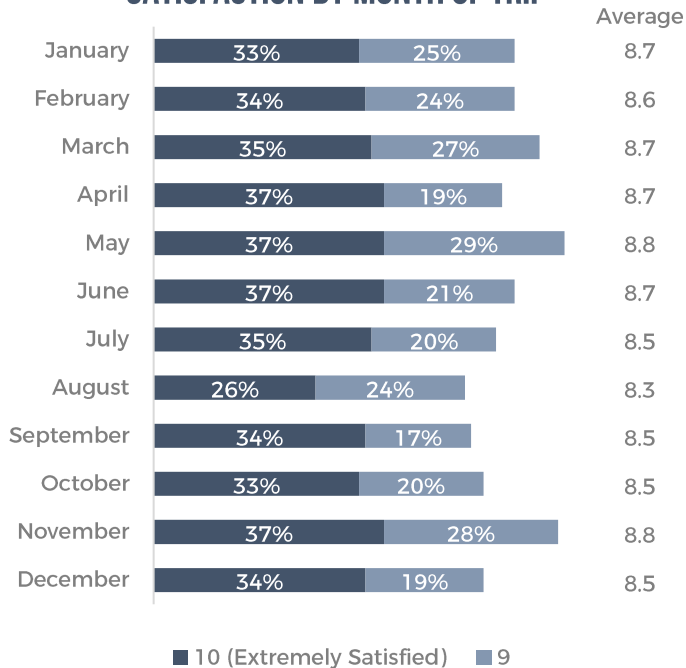
SATISFACTION BY LENGTH OF TRIP



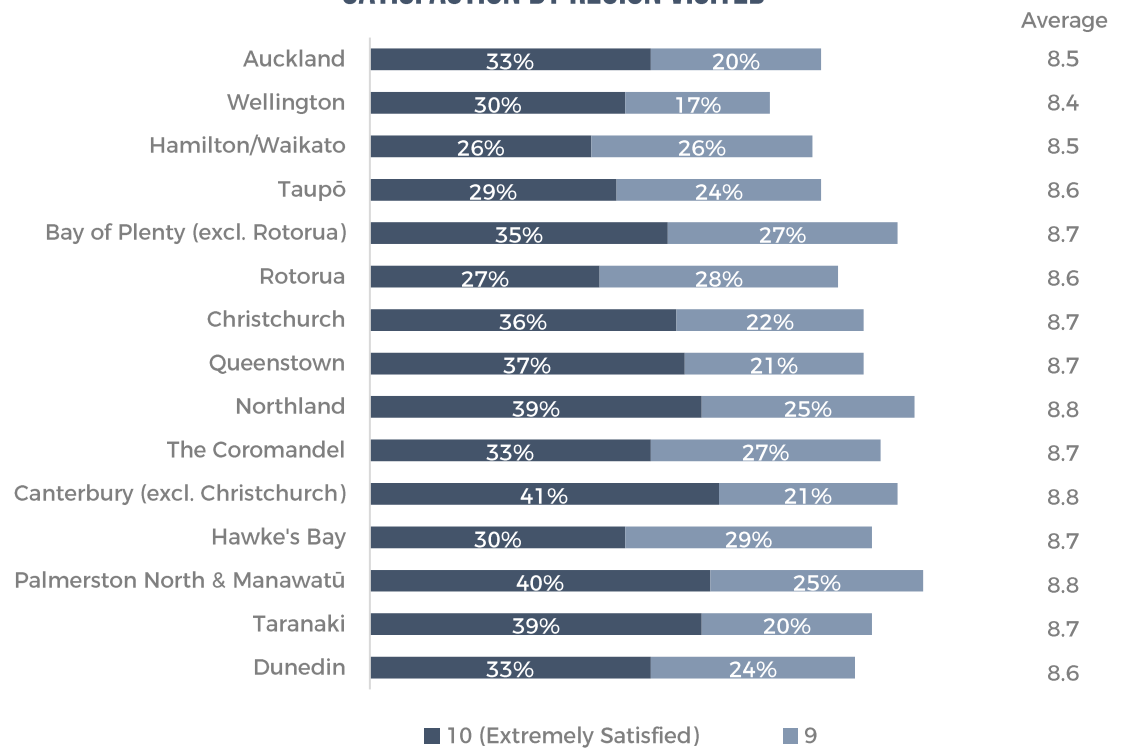
OVERALL SATISFACTION

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 *



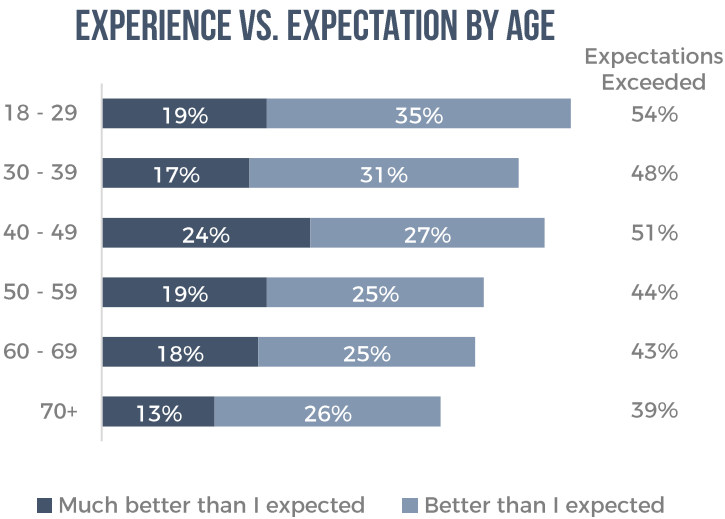
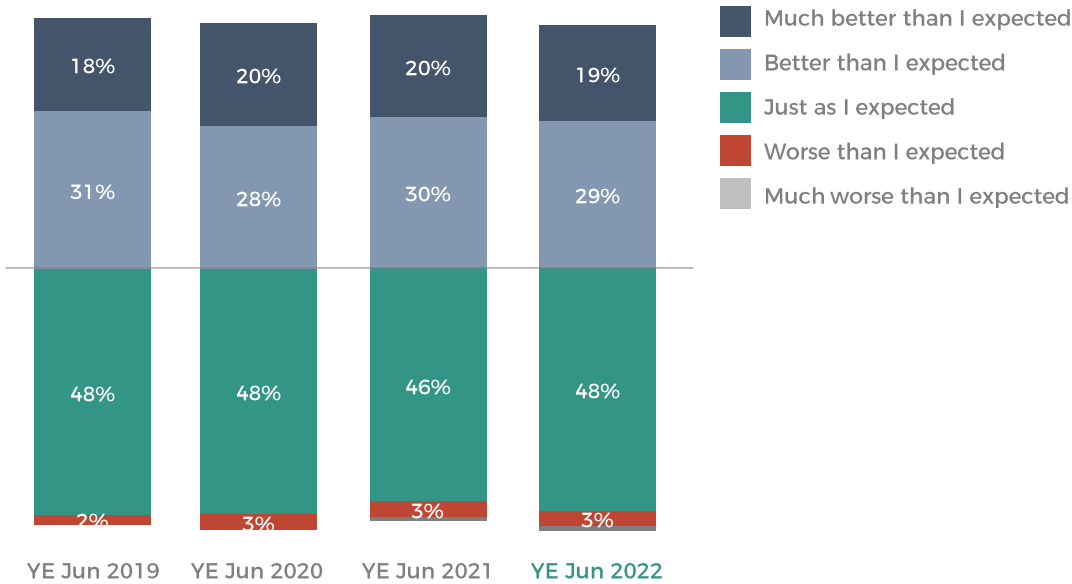
* Results for the 15 most commonly visited regions are displayed

Base: NZ residents who travelled domestically for leisure during the 12 months prior to survey completion (n=2,270)

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



COMMENTS

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

ROAD/TRAFFIC/TRANSPORT

"Road conditions were better than expected, drive times were consistent."

"Had a long journey around South Island. Low tourist numbers so no queues at any location, no traffic on road."

"Easy to move round the city, lovely weather, just a great time as usual."

"Flights were on time and airports efficient."

"My flight was quicker than anticipated."

"The increase in traffic on the roads which were not in good condition made it a very concentrated trip."

"Quality of roads were appalling - rough surface and lots of potholes."

"Traffic was a bit of a pain, parking was awful and places we wanted to visit were packed out."

"I got to my planned destinations, but traffic volumes and navigation were a stumbling block."

ACCOMMODATION/CAMPING

"The hotel staff were great, everything was very clean and we were able to safely distance from other people."

"(I) was really impressed with the standard of the motel."

"It was my first time freedom camping in Wellington. It was a positive experience."

"Camping went smoothly and the weather in Manawatū was very nice. Travel was also easy."

"We were staying in a campervan which I thought would be kind of rubbish and cramped but was actually so fun!"

"Worse because the accommodation pictures online were misleading and we paid a lot for something that wasn't worth the price we paid."

"Hard to find motel in Hamilton."

"Two of the motels we stayed in were not up to the standard we expected from reviews and their websites."

PRICE/VALUE

"It was cheaper than what I had budgeted."

"I enjoyed the whole experience from travelling there to my accommodation being top quality and affordable."

"I had booked a budget holiday but it turned out that the hotels were great and the trip itself well organised."

"Accommodation was perfect, dining out experience was great and the activities I wanted to do were affordable."

"Enjoyable affordable holiday - no complications!"

"Had a great time and didn't spend that much."

"Good value, great accommodation and hospitality venues were excellent. Nice scenery."

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

"Overpriced and poor value"

COMMENTS (CONT.)

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

PLACES

"I have been to Papamoa before and the experience was just the same - fun and relaxing."

"Christchurch is so beautiful city, with great restaurants and places to see and visit."

"(I) had never visited the Caitlin's or Stewart Island and was amazed and delighted with the scenic beauty and wildlife encountered."

"Hokitika is always a good idea."

"Mount Maunganui brings back happy childhood memories."

"Me and my son had a great time in Napier - the food, the culture the nature are perfect."

"Enjoyable week with friends doing the Taranaki Garden Festival."

"Whanganui is a family friendly place."

"The Bay of Plenty is one of my favourite areas in NZ."

"Hanmer Springs never fails to deliver."

COVID-RELATED

"Because of covid the experience of travelling around was "different" as there were far fewer people (tourists) which made for far more relaxing travelling."

"It wasn't crazy busy like it normally would pre-covid."

"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."

"In these tough times any holiday is a much better experience and the moments are savoured more now than it did before."

"My skiing holiday was stopped by Covid-19 lockdown."

"Great holiday but had to return home early due to Covid."

"There was a significant impact from COVID. Restaurants and activities not available really Monday through Thursday."

SERVICE/OVERALL EXPERIENCE

"The quality of the food and service was better than expected and some hidden gems discovered."

"Ease of travel and availability of services."

"It's usual, I have always had good experiences travelling in NZ."

"Variety of activities, fab weather, lots of time in nature, happy kids."

"Everything was as expected - hotel was nice, friendly service, availability of shops for things I needed, attractions etc."

"Cafes and accommodation were poor in service and value for money and we expected a more cordial welcome from locals."

"The weather was horrible, it was flooding and my flight could have gotten cancelled."

"My expectations on domestic travels are not high and predicted normal customer service as normal."

DOMESTIC VISITOR SATISFACTION (YE JUNE 2022)

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 Jun 2019 | YE Jun 2020 | YE Jun 2021 | YE Jun 2022 |
|------------|-----------------------|-------------|-------------|-------------|-------------|
| Promoters | 10 (Extremely likely) | 58% | 59% | 53% | 47% |
| | 9 | 15% | 15% | 17% | 17% |
| Passive | 8 | 13% | 13% | 14% | 18% |
| | 7 | 8% | 6% | 7% | 9% |
| Detractors | 6 | 2% | 3% | 3% | 4% |
| | 5 | 2% | 3% | 3% | 3% |
| | 4 | 0% | 0% | 0% | 0% |
| | 3 | 0% | 0% | 0% | 1% |
| | 2 | 0% | 0% | 0% | 0% |
| | 1 | 0% | 0% | 0% | 0% |
| | 0 (Not at all likely) | 1% | 1% | 1% | 0% |
| NPS | | +68 | +67 | +63 | +56 |
| Base: | | n=2,127 | n=2,170 | n=2,232 | n=2,270 |

NPS BY AGE

| | |
|-------------|------|
| 18-29 years | + 40 |
| 30-39 years | + 51 |
| 40-49 years | + 52 |
| 50-59 years | + 56 |
| 60-69 years | + 72 |
| 70 years+ | + 75 |

DOMESTIC VISITOR SATISFACTION (YE JUNE 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 1 July 2021 and 30 June 2022. The next update will be available in October 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>

