

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING JUNE 2023

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 2022 and June 2023 (meaning that the trip reported on may have taken place as far back as July 2021 or as recently as June 2023). Below are key insights for the survey year ending June 2023. 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. This proportion has been relatively stable over time, but some change is evident in reason for travel. Travel to attend events held by friends or family (e.g. weddings, funerals or reunions) has now returned to pre-Covid levels. Travel to attend events organised by someone else (e.g. sporting events, concerts or festivals) is significantly higher than it has been for the past two years, but not back to pre-Covid levels. Travel to visit family or friends has remained stable over the past five years.

Length of trip

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

Destination market share

Auckland and Wellington are the regions most likely to have been visited, together accounting for one third of recent trips. There has been no significant change in destination market share over the past year. Looking across the past five years, this most recent trip data suggests that Northland has seen a decline in domestic visitors and Queenstown an increase.

KEY INSIGHTS CONT.



Satisfaction

While domestic visitor satisfaction remains high, there has been a decrease in the proportion of New Zealanders who are 'extremely satisfied' with their overall experience on their most recent trip (31% in YE June 2023, down from 34% in YE June 2022 and 36% from YE June 2019 to YE June 2021). 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 domestic trip and a similar proportion found it just as they had expected. While only a very small proportion found their most recent trip fell short of expectation, this has increased over the past five years (4% in YE June 2023 up from 2% in YE June 2019).

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 +55, indicating that there are considerably more advocates for domestic travel than there are detractors. New Zealanders take pride in the diverse beauty of our country and are conscientiously supporting the local economy through domestic travel.

This Net Promoter Score has been decreasing over the past few years, as the proportion of New Zealanders advocating for domestic travel declines. The increasingly high cost of travel is the number one reason given by those unlikely to recommend New Zealand as a holiday destination for New Zealanders. Other mentions included concerns around safety/crime and poor quality or dated accommodation.

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 June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023
For a holiday or short-break	46%	43%	51%	52%	48%
To visit family or friends	34%	37%	36%	36%	35%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	8%	8%	6%	6%	8%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	9%	9%	5%	4%	7%
Other	2%	3%	2%	2%	2%
Base: Total sample	n=2,127	n=2,170	n=2,232	n=2,270	n=2,452

LENGTH OF TRIP	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023
1 Night	13%	14%	14%	12%	12%
2 Nights	27%	26%	24%	27%	26%
3 Nights	20%	19%	20%	20%	20%
4 Nights	11%	10%	11%	10%	12%
5 Nights	10%	10%	9%	9%	10%
6 Nights	3%	3%	3%	4%	4%
7 Nights (or more)	16%	18%	18%	18%	16%
Average Number of Nights (Median)	3	3	3	3	3
Base: Total Sample	n=2,127	n=2,170	n=2,232	n=2,270	n=2,452

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 15)	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023
Auckland	22%	25%	21%	20%	22%
Wellington	14%	14%	14%	13%	13%
Hamilton/Waikato	10%	11%	12%	11%	11%
Rotorua	13%	12%	11%	11%	11%
Christchurch	11%	10%	12%	11%	11%
Queenstown	8%	6%	9%	11%	11%
Taupō	11%	12%	10%	11%	10%
Bay of Plenty (excl. Rotorua)	10%	9%	12%	11%	10%
Northland	13%	13%	11%	10%	9%
Canterbury (excl. Christchurch)	9%	7%	10%	8%	8%
The Coromandel	8%	9%	8%	8%	7%
Hawke's Bay	7%	7%	8%	7%	6%
Palmerston North & Manawātū	6%	5%	7%	7%	6%
Dunedin	5%	6%	7%	5%	6%
Taranaki	5%	5%	6%	5%	5%
Base: Total Sample	n=2,127	n=2,170	n=2,232	n=2,270	n=2,452

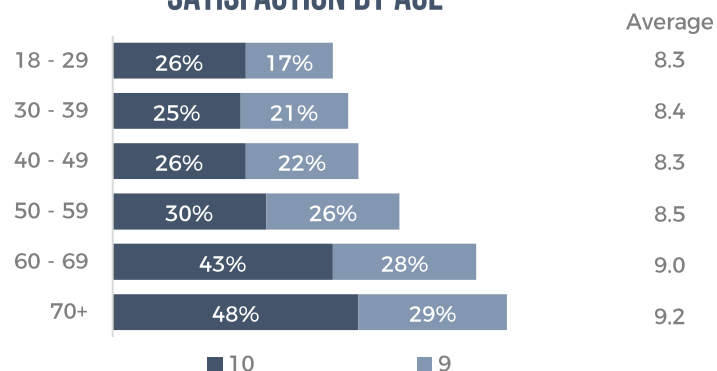
TIME OF YEAR	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023
January	17%	18%	19%	17%	16%
February	12%	14%	14%	12%	11%
March	11%	10%	10%	11%	11%
April	12%	7%	8%	11%	12%
May	9%	7%	6%	9%	8%
June	8%	8%	8%	10%	9%
July	7%	8%	8%	10%	9%
August	8%	8%	6%	6%	7%
September	9%	9%	8%	4%	8%
October	9%	9%	11%	6%	8%
November	9%	10%	9%	6%	7%
December	10%	12%	12%	9%	10%
Base: Total Sample	n=2,127	n=2,170	n=2,232	n=2,270	n=2,452

OVERALL SATISFACTION

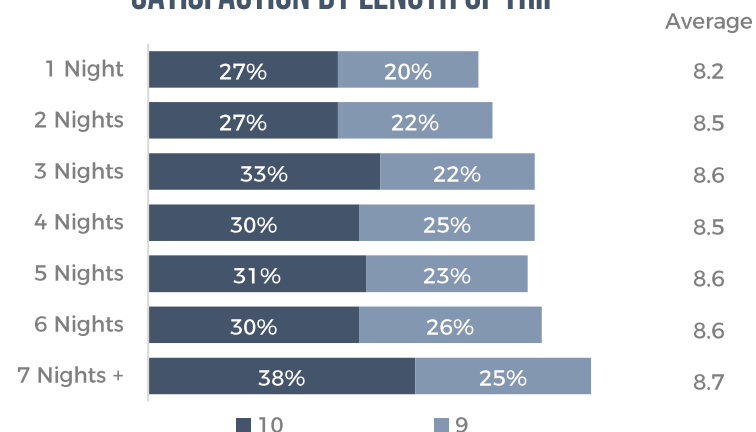
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023
10 (Extremely satisfied)	36%	36%	36%	34%	31%
9	23%	24%	26%	23%	23%
8	25%	22%	22%	25%	27%
7	10%	10%	10%	10%	12%
6	3%	4%	4%	4%	4%
5	2%	2%	1%	2%	2%
4	1%	1%	-	1%	-
3	-	-	-	-	-
2	-	-	-	-	-
1 (Not at all satisfied)	-	-	-	-	-
Average	8.7	8.7	8.7	8.6	8.5
Base: Total Sample	n=2,127	n=2,170	n=2,232	n=2,270	n=2,452

SATISFACTION BY AGE



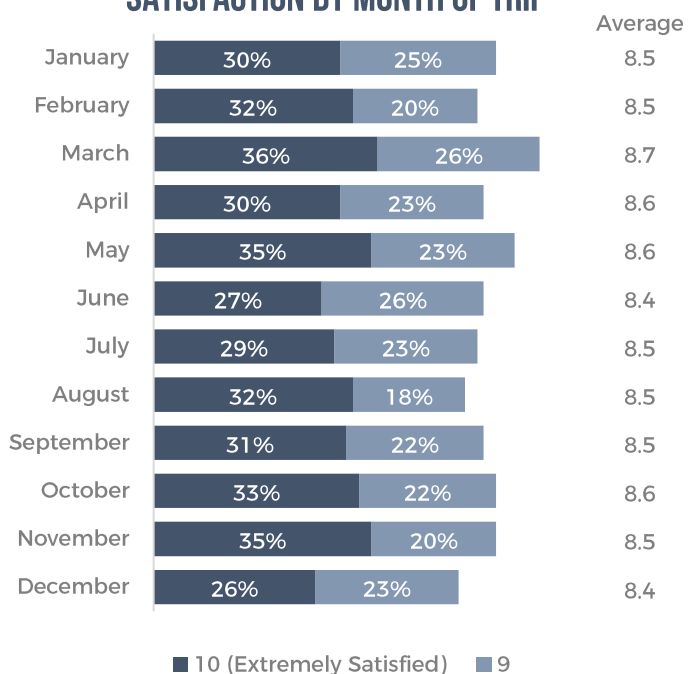
SATISFACTION BY LENGTH OF TRIP



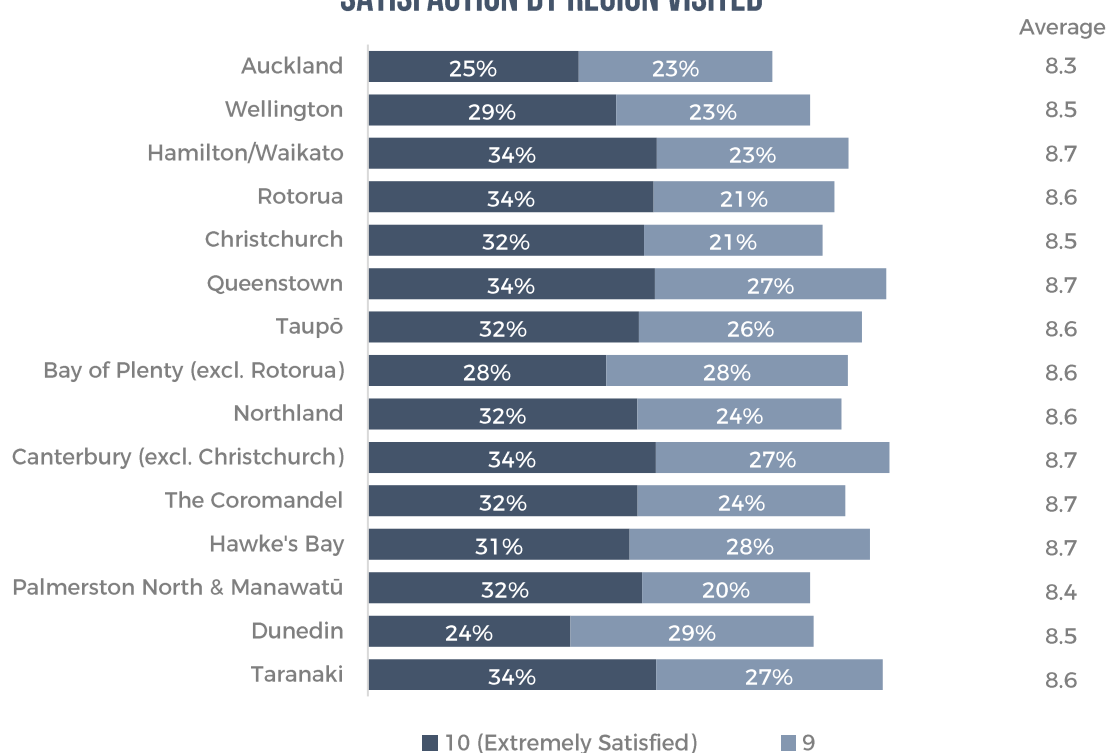
OVERALL SATISFACTION

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 *

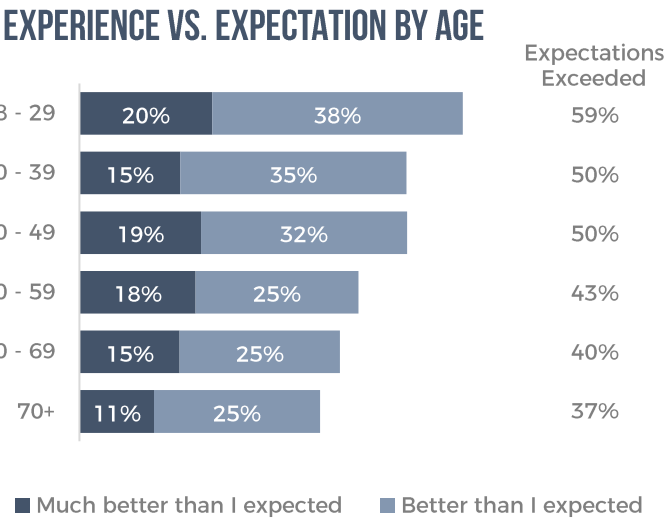
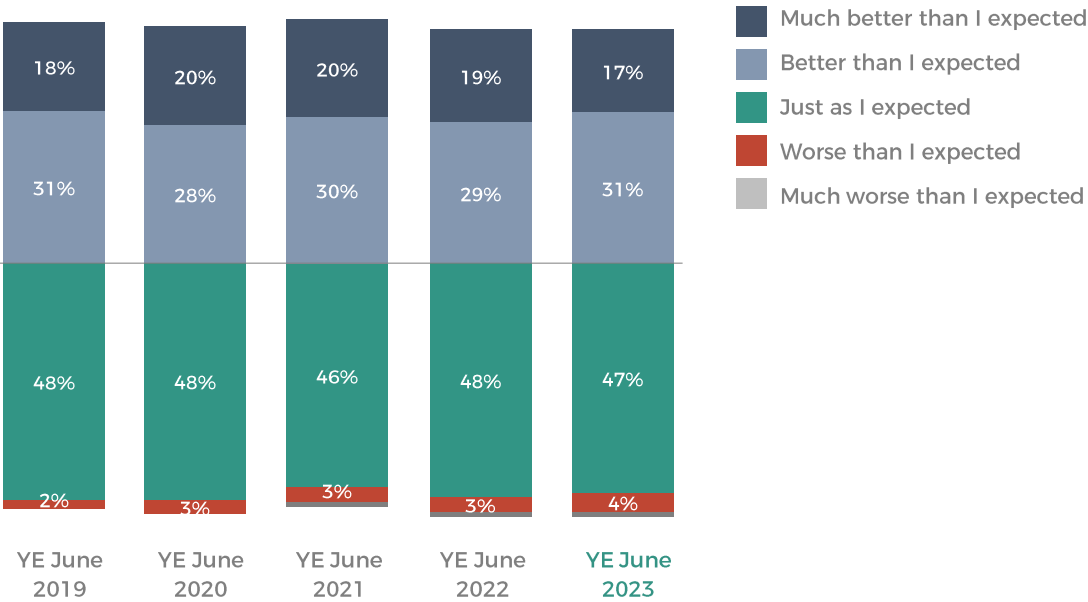


* Results for the 15 most commonly visited regions are displayed

EXPERIENCE VS. EXPECTATION

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

48% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



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 June 2019	YE June 2020	YE June 2021	YE June 2022	YE June 2023
Promoters	10 (Extremely likely)	58%	59%	53%	47%	45%
	9	15%	15%	17%	17%	19%
Passive	8	13%	13%	14%	18%	18%
	7	8%	6%	7%	9%	9%
Detractors	6	2%	3%	3%	4%	4%
	5	2%	3%	3%	3%	3%
	4	-	-	-	-	-
	3	-	-	-	1%	-
	2	-	-	-	-	-
	1	-	-	-	-	-
	0 (Not at all likely)	1%	1%	1%	-	1%
NPS		+68	+67	+63	+56	+55
Base:		n=2,127	n=2,170	n=2,232	n=2,270	n=2,452

NPS BY AGE

18-29 years	+ 39
30-39 years	+ 48
40-49 years	+ 50
50-59 years	+ 61
60-69 years	+ 68
70 years+	+ 80

NET PROMOTER SCORE (NPS) COMMENTS



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?

"New Zealand is a beautiful country with a lot of diverse experiences that every kiwi should experience at least once."

"My country and I am very proud of it. Have travelled extensively overseas in the past and have found nowhere any better than New Zealand."

"It is the most beautiful place in the world to visit. We are a very welcoming and friendly country, and the people of our country are the same."

"You can find everything here from beautiful beaches, amazing mountain climbs and even snowy mountains."

"To understand the land, you must first learn about the people. Then in more ways the people will open up the land then the sky is no limit to see how beautiful it can be."

"Because it's easy to get around and has wonderful scenery but it is very expensive."

"Wow we are so lucky to have a beautiful country. We don't need to travel far to experience fine dining, stunning scenery and wonderful experiences."

"Why would I not recommend NZ? We have a many varied landscape and things to do. Money spent in NZ stays in NZ."

"We have stunning places to visit, and we all need to support our own country especially since Covid."

"New Zealand is beautiful in so many ways everyone should visit this country at least once in their lives."

"Diversity and variety. Welcoming friendly people."

"Just the environment and how friendly people were during this holiday was really unique."

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?

"It's expensive to travel within NZ. You can get better value for money on overseas trips e.g. Gold Coast AND get consistent weather."

"Also safety concerns now. We encountered a gang fight on a recent trip to Auckland. It was horrific, really shook my wife and children."

"So expensive. Prohibitively expensive. Accommodation and hospitality aren't cheap anymore."

"NZ is a very expensive place, and rather than spend a fortune on accommodation, we slept on our daughter's floor in her small flat."

"Hotels are too expensive and the airline doesn't run to time."

"It's expensive and most accommodation is not on a par with that of overseas."

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 July 2022 and June 2023. The next update will be available in October 2023.

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>

