DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING MARCH 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 April 2022 and March 2023 (meaning that the trip reported on may have taken place as far back as April 2021 or as recently as March 2023). Below are key insights for the survey year ending March 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. For example, the proportion of New Zealanders travelling for holidays/short-breaks is significantly lower this year compared with YE March 2022. Compared with pre-Covid periods (YE Mar 2018/2019), the proportion of New Zealanders travelling for holidays/short-breaks remains significantly higher though, while the proportion travelling to attend public events is lower. The proportion travelling to visit family or friends has been stable across the five years measured.

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

Auckland and Wellington are the regions most commonly visited, together accounting for one third of trips.

Compared with pre-Covid periods, three regions in the North Island have experienced a significant decline in market share, including Northland, Auckland, and Rotorua while Queenstown has experienced a significant increase.

Time of the year

Compared with pre-Covid periods (YE Mar 2019/2020), travel in Spring (September – November) has reduced while travel in July has increased.

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KEY INSIGHTS CONT.

Satisfaction

A slight decrease in overall visitor satisfaction is evident in the year ending March 2023 - 56% scored their overall satisfaction with their experience on their last overnight trip as 9 or 10 out of 10 compared to 57% in YE March 2022 and 59% pre-Covid. 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. 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. While it remains at the same level as in YE March 2022, at +55, NPS has decreased compared with previous periods. For example it was +68 in YE March 2019, and +66 in YE March 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

MAIN REASON FOR TRIP	YE Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
For a holiday or short-break	45%	43%	49%	53%	49%
To visit family or friends	34%	36%	36%	35%	35%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	7%	9%	7%	5%	7%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	11%	9%	6%	5%	6%
Other	3%	3%	2%	2%	3%
Base: Total sample	n=2,104	n=2,183	n=2,187	n=2,273	n=2,396

LENGTH OF TRIP	YE Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
1 Night	13%	14%	13%	13%	13%
2 Nights	26%	27%	24%	26%	26%
3 Nights	20%	19%	19%	20%	21%
4 Nights	11%	11%	11%	10%	10%
5 Nights	10%	10%	10%	8%	10%
6 Nights	4%	3%	3%	4%	4%
7 Nights (or more)	16%	17%	19%	19%	17%
Average Number of Nights (Median)	3	3	3	3	3
Base: Total Sample	n=2,104	n=2,183	n=2,187	n=2,273	n=2,396

Base: NZ residents who travelled domestically for leisure during the 12 months prior to survey completion (n=2,396)

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 Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
Auckland	23%	24%	22%	19%	20%
Wellington	14%	14%	13%	13%	13%
Christchurch	11%	10%	11%	11%	11%
Queenstown	8%	7%	8%	10%	11%
Hamilton/Waikato	11%	10%	11%	12%	10%
Taupō	11%	11%	11%	11%	10%
Bay of Plenty (excl. Rotorua)	11%	10%	11%	11%	10%
Rotorua	12%	12%	11%	12%	10%
Northland	13%	13%	11%	11%	9%
Canterbury (excl. Christchurch)	8%	8%	10%	8%	8%
The Coromandel	8%	8%	7%	8%	7%
Hawke's Bay	8%	6%	8%	7%	6%
Palmerston North & Manawatū	6%	5%	7%	6%	6%
Dunedin	5%	6%	6%	5%	6%
Taranaki	5%	5%	5%	5%	5%
Base: Total Sample	n=2,104	n=2,183	n=2,187	n=2,273	n=2,396

TIME OF YEAR	YE Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
January	16%	16%	20%	17%	16%
February	13%	11%	16%	12%	11%
March	11%	12%	8%	11%	10%
April	12%	11%	3%	12%	12%
May	10%	8%	5%	9%	9%
June	8%	8%	8%	10%	9%
July	7%	8%	9%	10%	10%
August	8%	8%	7%	6%	7%
September	9%	9%	9%	5%	7%
October	10%	9%	11%	6%	7%
November	9%	9%	10%	6%	7%
December	10%	11%	12%	10%	9%
Base: Total Sample	n=2,104	n=2,183	n=2,187	n=2,273	n=2,396

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 Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
10 (Extremely satisfied)	36%	35%	37%	34%	32%
9	23%	24%	26%	23%	24%
8	24%	24%	21%	25%	27%
7	10%	11%	10%	10%	11%
6	4%	3%	4%	5%	3%
5	2%	2%	2%	2%	2%
4	1%	1%	-	-	-
3	-	-	-	-	-
2	-	-	-	-	-
1 (Not at all satisfied)	-	-	-	-	-
Average	8.6	8.7	8.7	8.6	8.6
Base: Total Sample	n=2,104	n=2,183	n=2,187	n=2,273	n=2,396

SATISFACTION BY AGE

Average

Age	10	9	Average
18 - 29	27%	19%	8.3
30 - 39	24%	23%	8.4
40 - 49	28%	21%	8.4
50 - 59	33%	26%	8.6
60 - 69	45%	27%	9.0
70+	46%	30%	9.2

■ 10   ■ 9
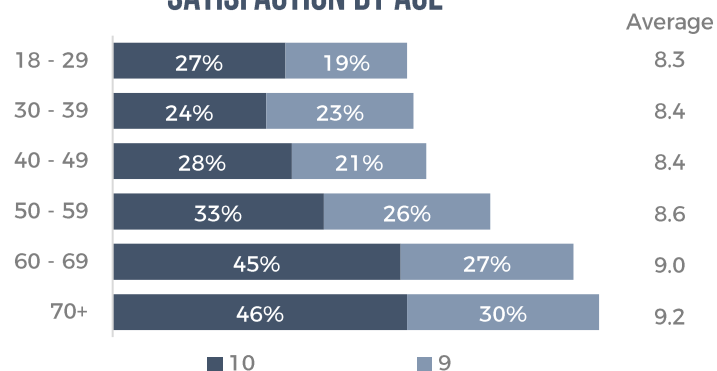
SATISFACTION BY LENGTH OF TRIP

Average

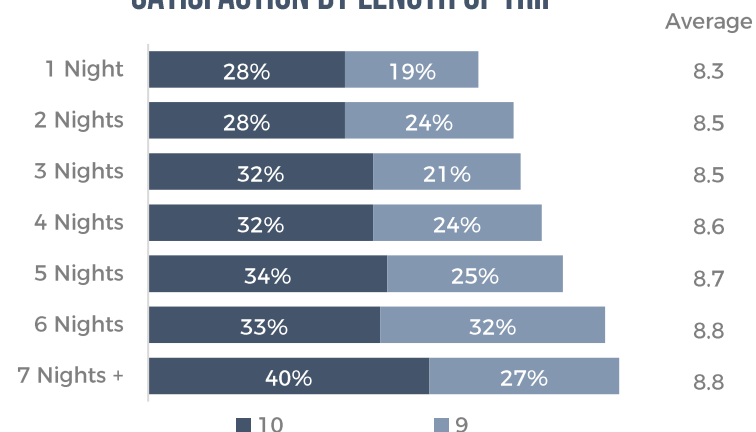| Length	10	9	Average
1 Night	28%	19%	8.3
2 Nights	28%	24%	8.5
3 Nights	32%	21%	8.5
4 Nights	32%	24%	8.6
5 Nights	34%	25%	8.7
6 Nights	33%	32%	8.8
7 Nights +	40%	27%	8.8

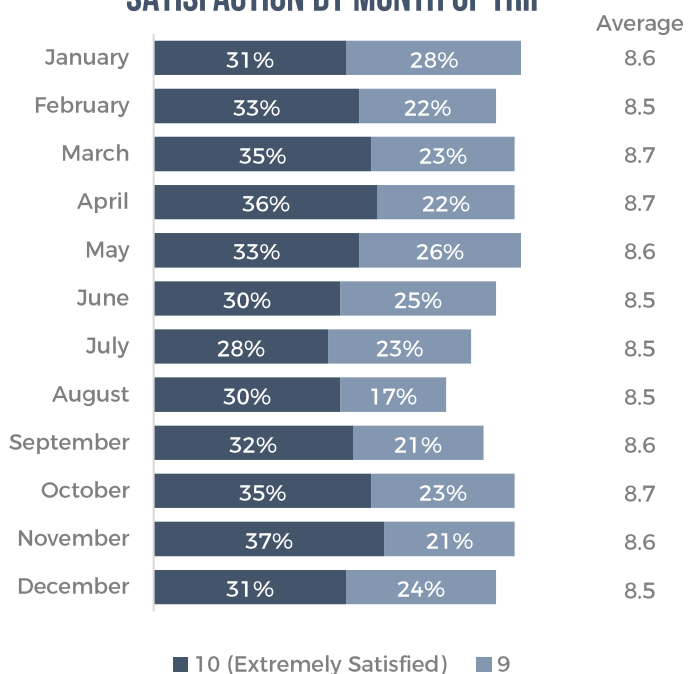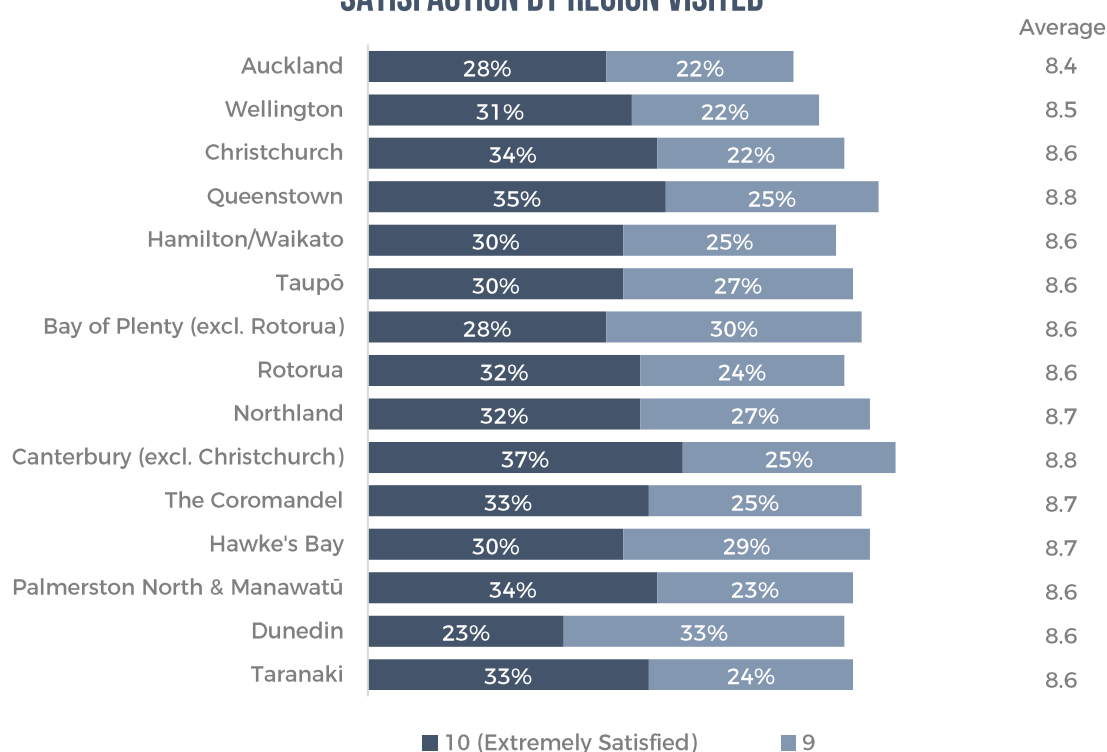■ 10   ■ 9

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

Month	10 (Extremely Satisfied)	9	Average
January	31%	28%	8.6
February	33%	22%	8.5
March	35%	23%	8.7
April	36%	22%	8.7
May	33%	26%	8.6
June	30%	25%	8.5
July	28%	23%	8.5
August	30%	17%	8.5
September	32%	21%	8.6
October	35%	23%	8.7
November	37%	21%	8.6
December	31%	24%	8.5

■ 10 (Extremely Satisfied) ■ 9

SATISFACTION BY REGION VISITED *

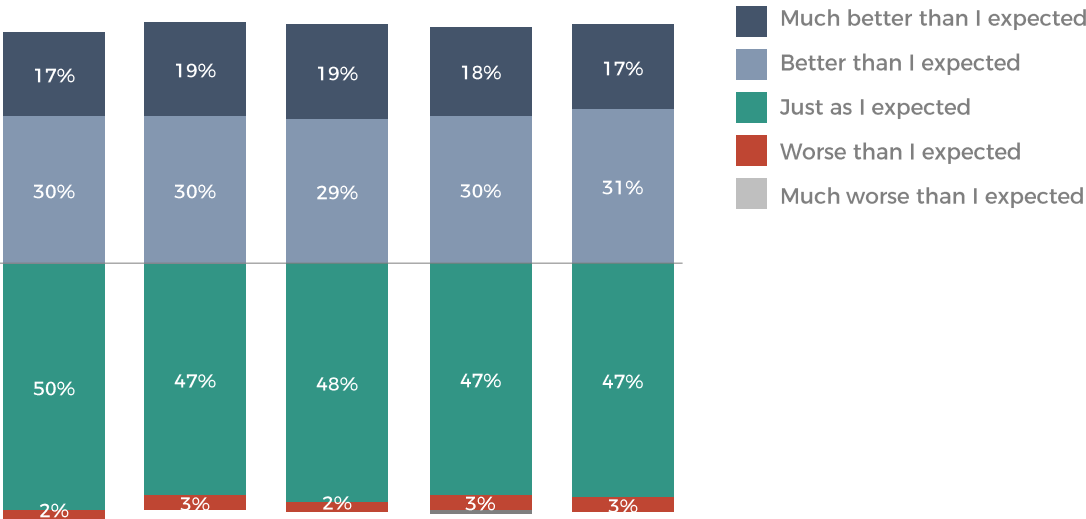| Region	10 (Extremely Satisfied)	9	Average
Auckland	28%	22%	8.4
Wellington	31%	22%	8.5
Christchurch	34%	22%	8.6
Queenstown	35%	25%	8.8
Hamilton/Waikato	30%	25%	8.6
Taupō	30%	27%	8.6
Bay of Plenty (excl. Rotorua)	28%	30%	8.6
Rotorua	32%	24%	8.6
Northland	32%	27%	8.7
Canterbury (excl. Christchurch)	37%	25%	8.8
The Coromandel	33%	25%	8.7
Hawke's Bay	30%	29%	8.7
Palmerston North & Manawatū	34%	23%	8.6
Dunedin	23%	33%	8.6
Taranaki	33%	24%	8.6

■ 10 (Extremely Satisfied) ■ 9

* Results for the 15 most commonly visited regions are displayed
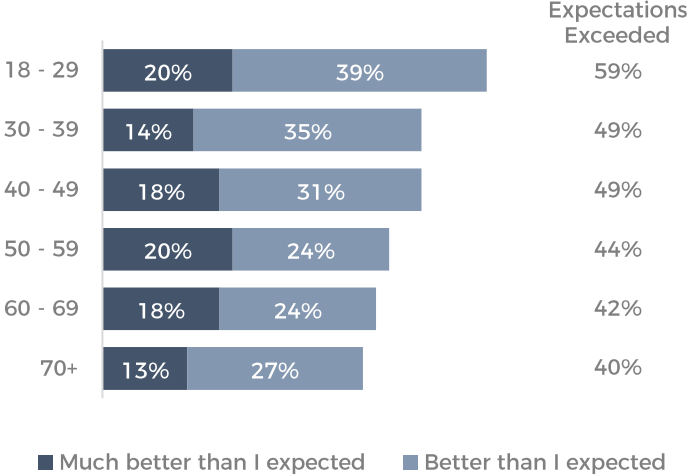
EXPERIENCE VS. EXPECTATION

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

Legend:
- Much better than I expected
- Better than I expected
- Just as I expected
- Worse than I expected
- Much worse than I expected

Left chart data:

	YE Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
Much better than I expected	17%	19%	19%	18%	17%
Better than I expected	30%	30%	29%	30%	31%
Just as I expected	50%	47%	48%	47%	47%
Worse than I expected	2%	3%	2%	3%	3%

EXPERIENCE VS. EXPECTATION BY AGE

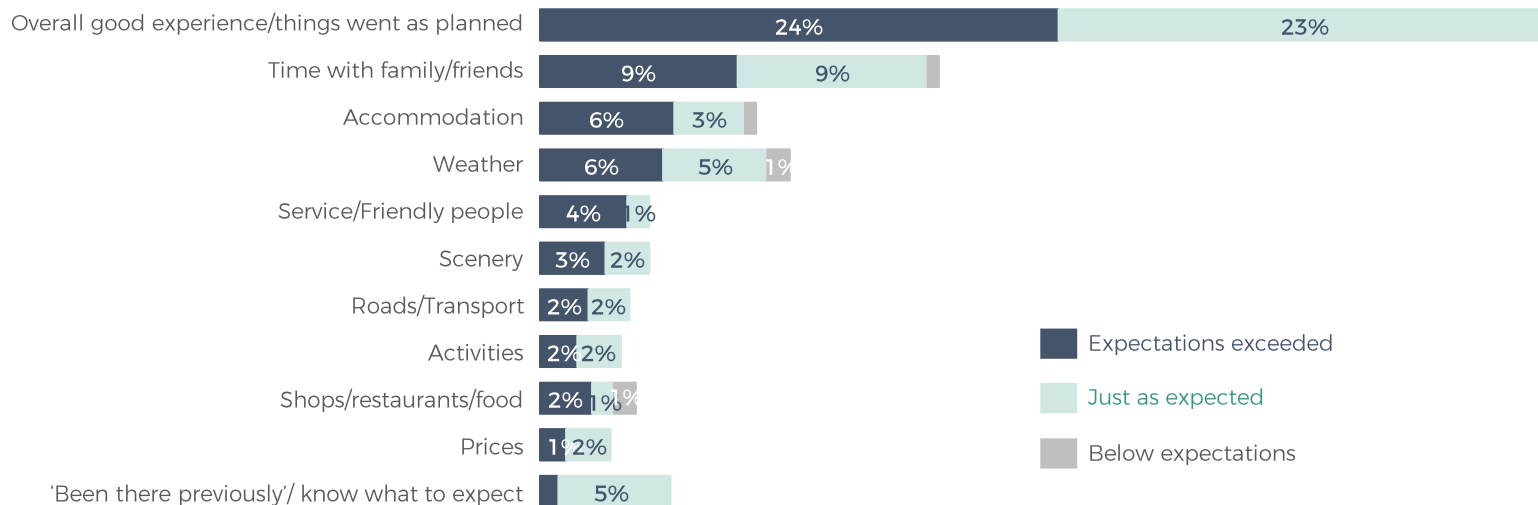| Age	Much better than I expected	Better than I expected	Expectations Exceeded
18 - 29	20%	39%	59%
30 - 39	14%	35%	49%
40 - 49	18%	31%	49%
50 - 59	20%	24%	44%
60 - 69	18%	24%	42%
70+	13%	27%	40%

COMMENTS (Q1 2023)

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

Reasons for rating the overall experience

Reason	Expectations exceeded	Just as expected	Below expectations
Overall good experience/things went as planned	24%	23%	
Time with family/friends	9%	9%	
Accommodation	6%	3%	
Weather	6%	5%	1%
Service/Friendly people	4%	1%	
Scenery	3%	2%	
Roads/Transport	2%	2%	
Activities	2%	2%	
Shops/restaurants/food	2%	1%	1%
Prices	1%	2%	
'Been there previously'/ know what to expect		5%	

Legend:
- Expectations exceeded
- Just as expected
- Below expectations

"It was a good trip - no unexpected pitfalls, and pleasant time with family"

"The accommodation was great we were able to get pet-friendly accommodation wherever we went, the sights and weather were great too"

"I had low expectations following the pandemic, but the hospitality venues had recovered better than I might have expected"

"The experience was good but there was a bit of rain and some flooding, but the sites were good to see."

"Everyone (was) so friendly and weather (was) great, accommodation (was) excellent, prices were fair"

"The journey was smooth, the community were welcoming, the venue was close to our accommodation and tidy."

"I already knew a lot about Stewart Island, and it was just as I had researched. The accommodation was not very good though – disappointing"

"Better experiences on offer and restaurants/cafes than the last time we went"

"Love the area - lots to do, enjoyed 4-wheel driving to Skippers and Macy town"

"Less foreign tourists creating havoc on the roads made for very pleasant driving and the scenery and things to do was wonderful, just rather expensive"

"Flights left on time whereas last time they were extremely delayed, traffic wasn't bad so was more of a calm experience"

"My experience on the Whanganui river was more relaxing, and fulfilling than expected"

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 Mar 2019	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023
Promoters	10 (Extremely likely)	58%	57%	56%	47%	46%
	9	16%	16%	16%	17%	18%
Passive	8	12%	13%	13%	18%	18%
	7	7%	6%	7%	9%	9%
Detractors	6	2%	3%	3%	3%	4%
	5	2%	3%	3%	4%	3%
	4	-	-	1%	-	-
	3	-	-	-	-	1%
	2	-	-	-	-	-
	1	-	-	-	-	-
	0 (Not at all likely)	1%	1%	1%	-	1%
NPS		+68	+66	+64	+55	+55
Base:		n=2,104	n=2,183	n=2,187	n=2,273	n=2,396

NPS BY AGE

18-29 years	+ 40
30-39 years	+ 47
40-49 years	+ 51
50-59 years	+ 61
60-69 years	+ 70
70 years+	+ 79

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 April 2022 and March 2023. The next update will be available in July 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