

# DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING MARCH 2024

## 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 April 2023 and March 2024 (meaning that the trip reported on may have taken place as far back as April 2022 or as recently as March 2024). Below are key insights for the survey year ending March 2024.

Comparisons are made with results from previous years where relevant. Quarter to quarter (YE end Dec 2023 to YE Mar 24) there has been little movement in any of the numbers.

### Incidence of travel and reason for travel

Almost three quarters of New Zealanders (73%) took a domestic trip within the past 12 months, for leisure purposes. This number has been consistent for the past two years. However, the reasons for travel have changed slightly, returning to pre-Covid patterns. 47% travelled domestically for a holiday or short break, whereas this number was over 50% in the previous two years., 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. Travel to visit family or friends has remained stable.

### Length of trip

The median length of a domestic leisure trip is three nights, which has been stable over time. 43% of domestic travellers spent four nights or more away from home on their last overnight trip, up slightly from 41% in the previous year.

### Destination market share

Auckland is the most visited region and has increased its market share to 26%. It is followed in popularity by Wellington, Hamilton/Waikato, Taupō and Rotorua. Looking across the past five years, Northland has seen a steady decline in market share.

## KEY INSIGHTS (CONT.)



### Time of travel

The 5 months from April to August saw a decline in reported travel, with 40% of all trips occurring during this period, compared to 47% previously.

### Satisfaction

Domestic visitor satisfaction has dropped slightly but remains high at 8.5 out of 10. 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 Mar 2024, down from 32% in previous year and from the highest of 37% in YE Mar 2021). Older New Zealanders (especially those aged over 70) continue to be more satisfied than younger New Zealanders, as do those taking longer trips (3+ nights). Queenstown and Coromandel had the highest regional satisfaction (8.7 out of 10).

### 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 4% 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 has been steadily declining since 2020 but is still a positive +53, indicating that there are considerably more advocates for domestic travel than there are detractors. The detractors commonly mentioned cost as their main concern.

The older we get, the more likely we are to recommend a New Zealand domestic holiday. 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



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

MAIN REASON FOR TRIP	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
For a holiday or short-break	43%	49%	53%	49%	47%
To visit family or friends	36%	36%	35%	35%	36%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	9%	7%	5%	7%	7%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	9%	6%	5%	6%	8%
Other	3%	2%	2%	3%	2%
Base: Total sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350

LENGTH OF TRIP	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
1 Night	14%	13%	13%	13%	12%
2 Nights	27%	24%	26%	26%	26%
3 Nights	19%	19%	20%	21%	19%
4 Nights	11%	11%	10%	10%	12%
5 Nights	10%	10%	8%	10%	11%
6 Nights	3%	3%	4%	4%	3%
7 Nights (or more)	17%	19%	19%	17%	17%
Average Number of Nights (Median)	3	3	3	3	3
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350



## 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?

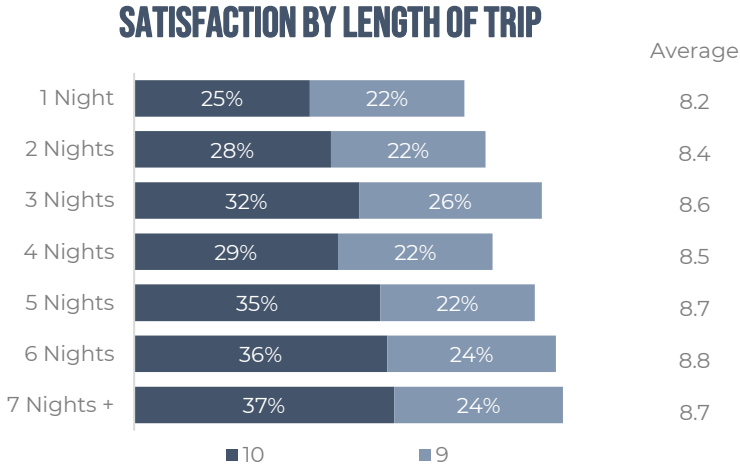
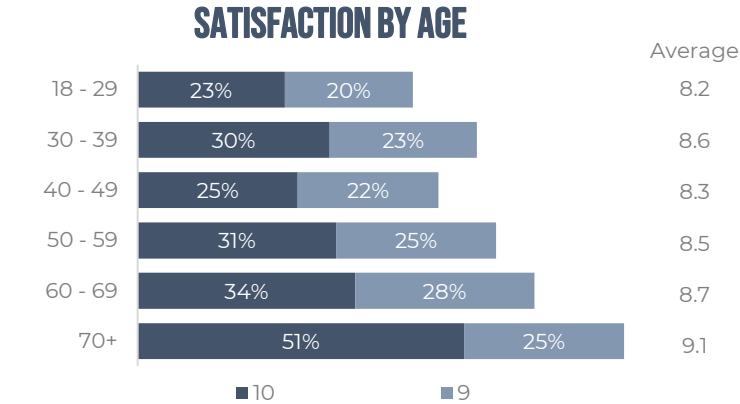
REGIONS VISITED (Top 14)	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
Auckland	24%	22%	19%	20%	26%
Wellington	14%	13%	13%	13%	14%
Hamilton/Waikato	10%	11%	12%	10%	12%
Taupō	11%	11%	11%	10%	12%
Rotorua	12%	11%	12%	10%	12%
Christchurch	10%	11%	11%	11%	11%
Northland	13%	11%	11%	9%	9%
Bay of Plenty (excl. Rotorua)	10%	11%	11%	10%	9%
Canterbury (excl. Christchurch)	8%	10%	8%	8%	9%
Queenstown	7%	8%	10%	11%	9%
The Coromandel	8%	7%	8%	7%	7%
Hawke's Bay	6%	8%	7%	6%	7%
Palmerston North & Manawatu	5%	7%	6%	6%	6%
Dunedin	6%	6%	5%	6%	6%
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350

TIME OF YEAR	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
January	16%	20%	17%	16%	16%
February	11%	16%	12%	11%	12%
March	12%	8%	11%	10%	11%
April	11%	3%	12%	12%	11%
May	8%	5%	9%	9%	7%
June	8%	8%	10%	9%	7%
July	8%	9%	10%	10%	9%
August	8%	7%	6%	7%	6%
September	9%	9%	5%	7%	8%
October	9%	11%	6%	7%	9%
November	9%	10%	6%	7%	7%
December	11%	12%	10%	9%	10%
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350

# OVERALL SATISFACTION

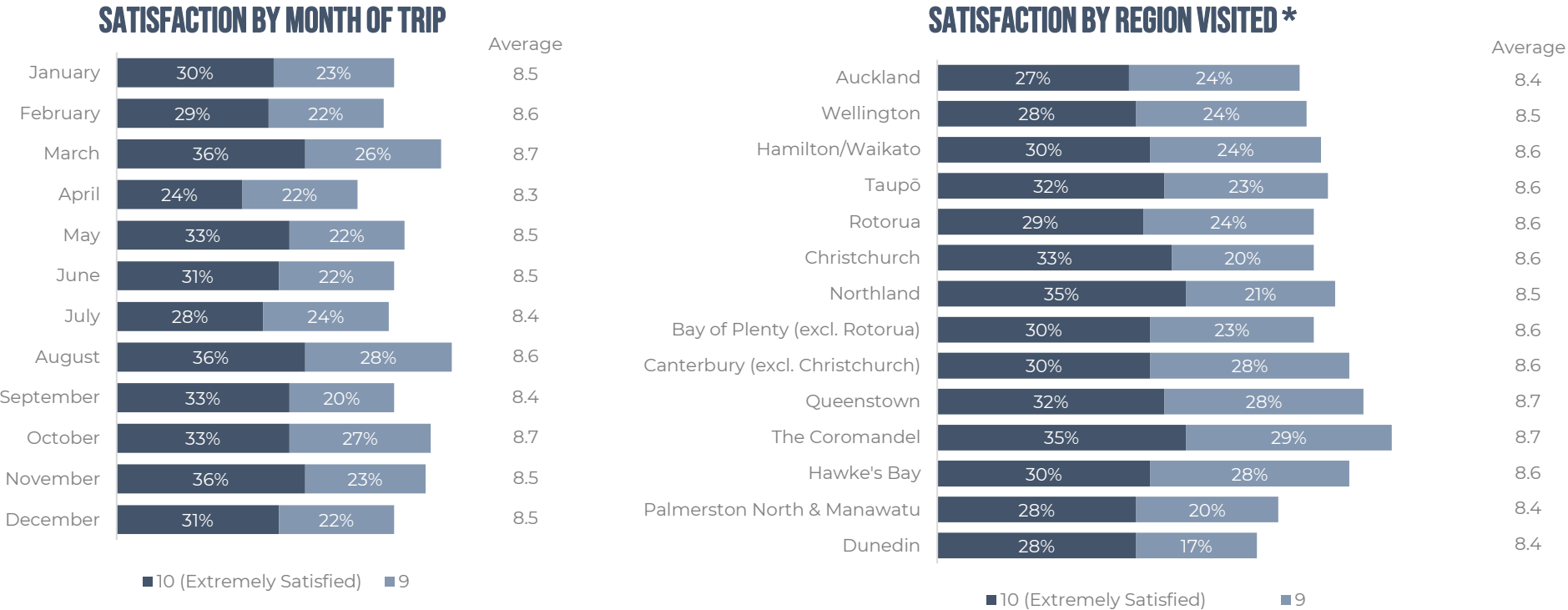
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
10 (Extremely satisfied)	35%	37%	34%	32%	31%
9	24%	26%	23%	24%	23%
8	24%	21%	25%	27%	27%
7	11%	10%	10%	11%	12%
6	3%	4%	5%	3%	4%
5	2%	2%	2%	2%	2%
4	1%	-	-	-	1%
3	-	-	-	-	1%
2	-	-	-	-	-
1 (Not at all satisfied)	-	-	-	-	-
Average	8.7	8.7	8.6	8.6	8.5
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350



# OVERALL SATISFACTION

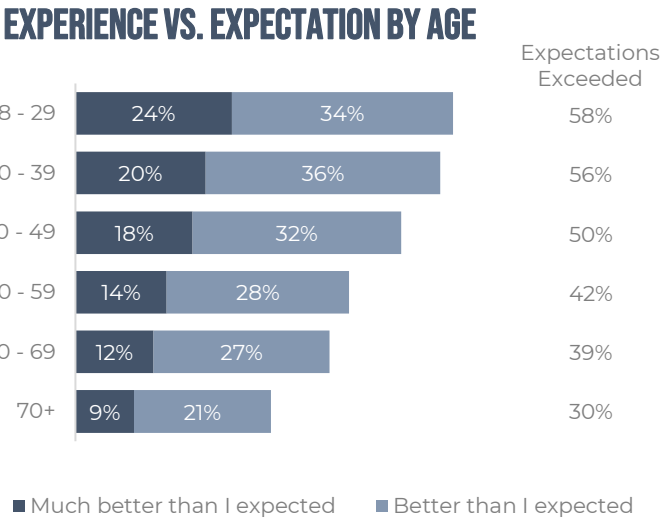
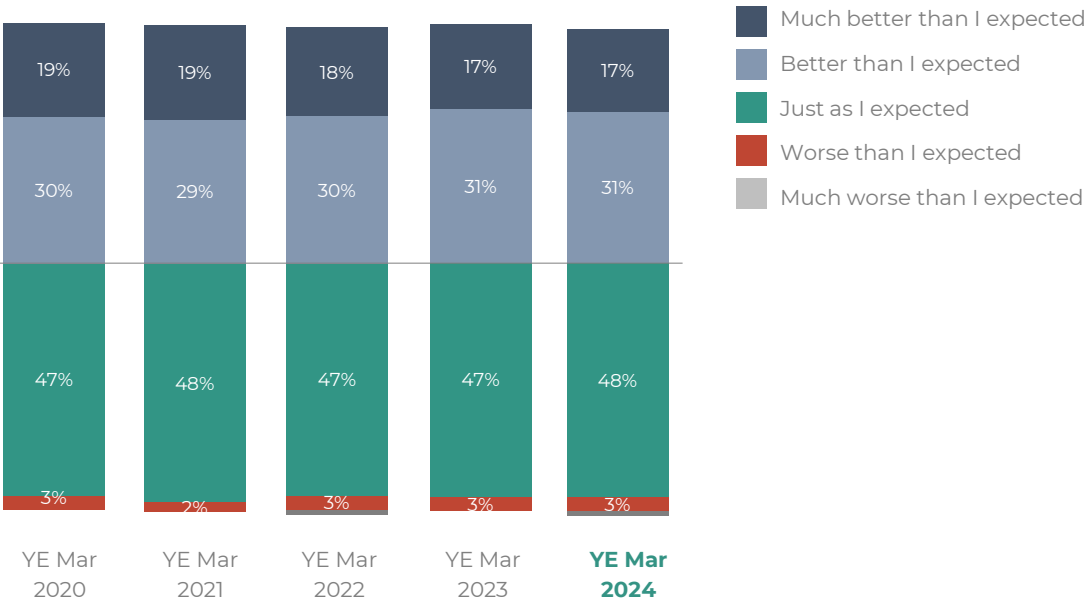
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?



# 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 Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024
Promoters	10 (Extremely likely)	57%	56%	47%	46%	42%
	9	16%	16%	17%	18%	20%
Passive	8	13%	13%	18%	18%	20%
	7	6%	7%	9%	9%	9%
Detractors	6	3%	3%	3%	4%	3%
	5	3%	3%	4%	3%	3%
	4	-	1%	-	-	-
	3	-	-	-	-	-
	2	-	-	-	-	-
	1	-	-	-	-	-
	0 (Not at all likely)	1%	1%	0	1%	1%
NPS		+66	+64	+55	+55	+53
Base:		n=2,183	n=2,187	n=2,273	n=2,396	n=2,350

## NPS BY AGE

18-29 years	+ 40
30-39 years	+ 50
40-49 years	+ 48
50-59 years	+ 56
60-69 years	+ 61
70 years+	+ 76

Themes from NPS comments	
Variety of things to do and visit	32%
Natural environment and scenery	27%
Beautiful country	24%
Great holiday/experience	16%
Friendly and welcoming people	11%
Lovely/great country in the world	7%
New Zealanders seeing their own home country	6%
Pricing - too expensive	5%
Weather	5%
Safe country	5%
Ease and accessibility	4%
Hospitality/food and beverage/customer service	4%
Great beaches	4%
Something for everyone	4%
Pricing - value for money	3%
Accommodation	3%
Relaxing break/getaway	3%
Clean	2%
Transportation	2%
Not too busy or crowded	1%
Supporting the local economy	1%
Crime concerns	0%
Other	3%
Base: Q1 2024	



## 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?

"Hawkes Bay has many attractions would like to have stayed longer."

"So much to see and offer. each town has its own uniqueness."

"Waitemata Harbour and The Bay of Islands, wonderful summer destinations, with a sense of freedom, horses ridden into the sea early morning at Orewa, with the sun breaking over the sea. Just a great NZ experience."

"It is a beautiful, safe, friendly and welcoming place to live and visit"

"Adventure seekers will find endless opportunities for outdoor activities in Tasman and Greymouth. From hiking along the Abel Tasman Coast Track to exploring the Punakaiki Pancake Rocks and blowholes, there's something for everyone. You can also indulge in thrilling activities like kayaking, white-water rafting, and even skydiving for an adrenaline rush."

"Variety of landscapes. Friendliness of people. Multiculturalism and Fresh food."

"Taupo is a great destination to visit, we had a great time with our children who can't wait to go back. it was clean and had great facilities."

"We underestimate the natural beauty of our country the South Island is pretty much untouched its nice to see nature unspoiled."

"Friendly people, huge range of scenery and plenty of outdoor experiences."

"Taupo is a great place to chill out or lots to do if you want to."

"Something for everyone, friendly people, great summer weather, a lot going on."

"Beautiful country with friendly people and easy to get around. Also, it's relatively safe."

"New Zealand has beautiful scenery & so many outdoor and indoor activities. also, you get to learn the history of Aotearoa. People here are so nice & I would recommend people to visit New Zealand for a holiday."

"NZ has so many areas that never get seen or explored. I would definitely recommend traveling by road in order to see all the unique areas NZ has to offer that normally never get seen by most tourists and even Kiwis themselves."

## 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?

"Wide range of experiences to discover, but budget accommodation in NZ is generally of poor/mediocre standards when compared to many other destinations."

"There is so much to see and do here, but it is very expensive."

"Worthwhile seeing your own country but NZ is now really expensive, feels very unsafe and has gone backwards in last 5 years or so."

"Auckland city was basically a venue for the homeless."

"Great place to visit but our crime rate is getting higher."

"Cost of air domestic travel."

"If you are looking for urban city shopping experience then answer would be no, but scenery nature environment is absolutely beautiful."

"There is so much to see and do here, but it is very expensive."

"Great outdoor areas to explore and plenty of fantastic views, just getting to them sometimes takes a while and the cities are often too full and busy to be enjoyable."

"Good to explore and know your own country but can be a bit pricey to travel distance e.g. North to South Island and camping now also more expensive than it used to be."

"There is a lot of things to do and see here, only issue is the high cost"

"It's a lovely place but expensive and congested."

"It is pretty expensive to travel internally."

"For me Queenstown is beautiful, but it is now overpopulated."

"NZ has a lot of natural beauty to explore and enjoy. but accommodation is really expensive."

"Not that polluted with spectacular scenery. expensive though."

DOMESTIC VISITOR SATISFACTION (YE MARCH 2024)

## 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 7,000 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 2023 and March 2024. The next update will be available in July 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>

