

DOMESTIC VISITOR SATISFACTION

YEAR ENDING MARCH 25

KEY INSIGHTS



This report presents an overview of New Zealanders' most recent domestic leisure trip, based on surveys completed between March 2024 and March 2025. Each respondent reported on a trip taken within the 12 months prior to completing the survey, meaning trips could have occurred any time between March 2024 and March 2025. This section includes key insights for the year ending March 2025, with comparisons to previous years where relevant.

Incidence of travel and reason for travel

Three in four New Zealanders (75%) took a domestic leisure trip during the survey period, slightly higher than 72% in the previous year. Holidays or short breaks and visiting family or friends (VFR) remain the two main reasons for domestic travel. However, the proportion travelling for holidays has declined, while travel to visit friends or family or to attend events has increased.

Length of trip

The average domestic leisure trip lasted three days, consistent with previous years, highlighting a continued preference for short getaways amongst New Zealand travellers since tracking began.

Destination market share

Nelson entered the top 15 destinations this year, overtaking Taranaki. Rotorua saw a slight decline in share, dropping from 12% to 10%, while Northland gained ground, rising from 9% to 11%. Wellington and Auckland remained the most visited regions, holding steady in the top two positions.

Satisfaction

As in previous years, satisfaction was highest amongst older travellers and those who took longer trips. The overall average satisfaction rating rose to 8.6, up from 8.4 in 2024, and in line with ratings seen in 2022 and 2023. One-third of New Zealanders were **extremely satisfied** with their most recent domestic trip, and a further quarter rated their trip 9 out of 10. Notably, no respondents gave a rating below 5. Nelson recorded the highest satisfaction score at 8.9, overtaking Canterbury (excluding Christchurch). Across all regions, satisfaction remained strong, with every destination receiving an average rating of at least 8.5.

KEY INSIGHTS CONT.



Experience vs Expectation

As in the previous year, 47% of travellers said their experience met expectations. The age pattern remained consistent: younger travellers were the most likely to rate their experience as “better” or “much better” than expected, even though older travellers continued to report the highest overall satisfaction.

Net Promoter Score (NPS)

The Net Promoter Score (NPS) declined again this year, dropping to 49. This is down from 53 the year prior and well below the peak of 66 recorded in March 2020. The latest decrease was driven both by a reduction in promoters, and a rise in detractors.

It is worth noting that NPS has trended downward since 2019 across ALL ‘purpose of visit’ groups (holiday, VFR, events), with the exception of those travelling for ‘other’ reasons.

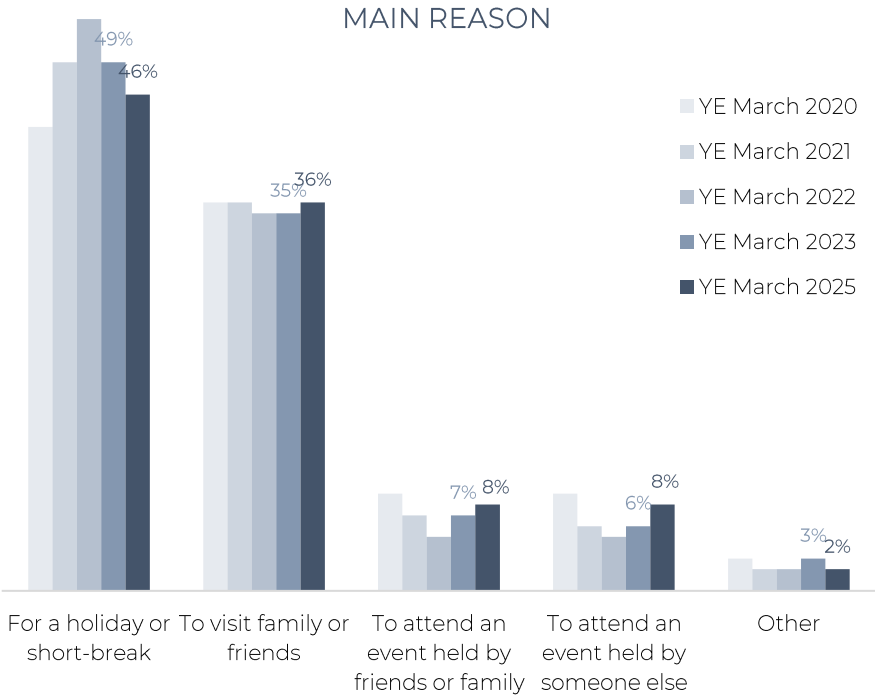
In the latest year, NPS fell across most age groups, excluding those aged 40–49. The most notable drop occurred amongst travellers aged 70 and over, whose score declined from 76 to 69, signaling a loss among what has traditionally been the most dedicated group of promoters. Nelson recorded the highest NPS of all regions at 61, reflecting the strong satisfaction ratings also given by visitors. Northland and Hawke’s Bay followed closely behind.

Travellers continued to highlight the appeal of domestic travel, particularly Aotearoa’s natural beauty and outdoor experiences. Many reiterated the value of exploring their own country before heading overseas. However, reluctance to recommend domestic travel was commonly linked to high costs. Other concerns included roading infrastructure, limited activities in some areas, and general feelings of boredom in quieter regions.

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP



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



LENGTH OF TRIP	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024	YE Mar 2025
1 Night	14%	13%	13%	13%	12%	12%
2 Nights	27%	24%	26%	26%	26%	27%
3 Nights	19%	19%	20%	21%	19%	21%
4 Nights	11%	11%	10%	10%	12%	10%
5 Nights	10%	10%	8%	10%	11%	10%
6 Nights	3%	3%	4%	4%	3%	3%
7 Nights (or more)	17%	19%	19%	17%	17%	16%
Average Number of Nights (Median)	3	3	3	3	3	3
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350	n=2,334

PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

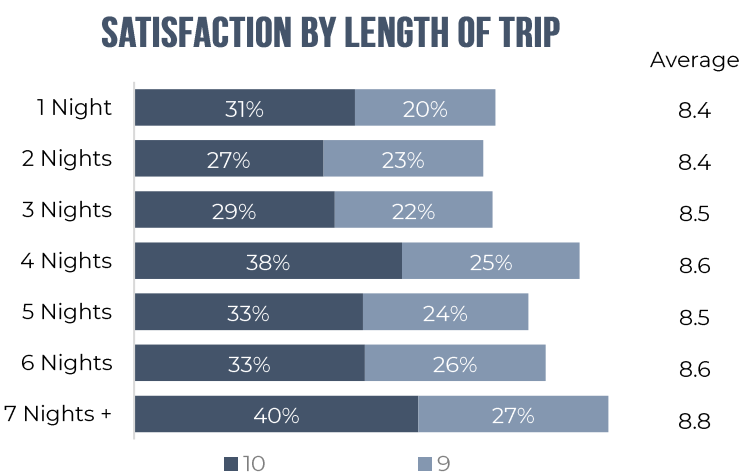
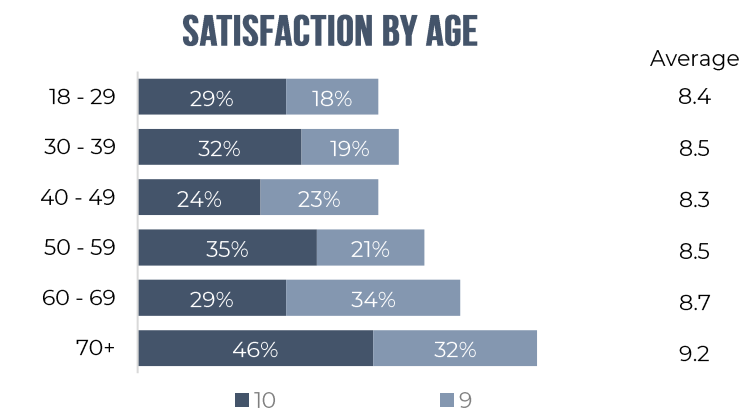
Which region/s did you visit on your last overnight trip within New Zealand?

REGIONS VISITED (Top 15)	YE March 2020	YE March 2021	YE March 2022	YE March 2023	YE March 2024	YE March 2025
Auckland	24%	22%	19%	20%	26%	25%
Wellington	14%	13%	13%	13%	14%	14%
Hamilton/Waikato	10%	11%	12%	10%	12%	13%
Taupō	11%	11%	11%	10%	12%	11%
Northland	13%	11%	11%	9%	9%	11%
Christchurch	10%	11%	11%	11%	11%	11%
Bay of Plenty (excl. Rotorua)	10%	11%	11%	10%	9%	10%
Rotorua	12%	11%	12%	10%	12%	10%
Queenstown	7%	8%	10%	11%	9%	9%
Canterbury (excl. Christchurch)	8%	10%	8%	8%	9%	8%
The Coromandel	8%	7%	8%	7%	7%	7%
Hawkes bay	6%	8%	7%	6%	7%	6%
Dunedin	6%	6%	5%	6%	6%	5%
Palmerston North & Manawatū	5%	7%	6%	6%	6%	5%
Nelson	5%	5%	4%	5%	5%	5%
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350	n=2,334

OVERALL SATISFACTION

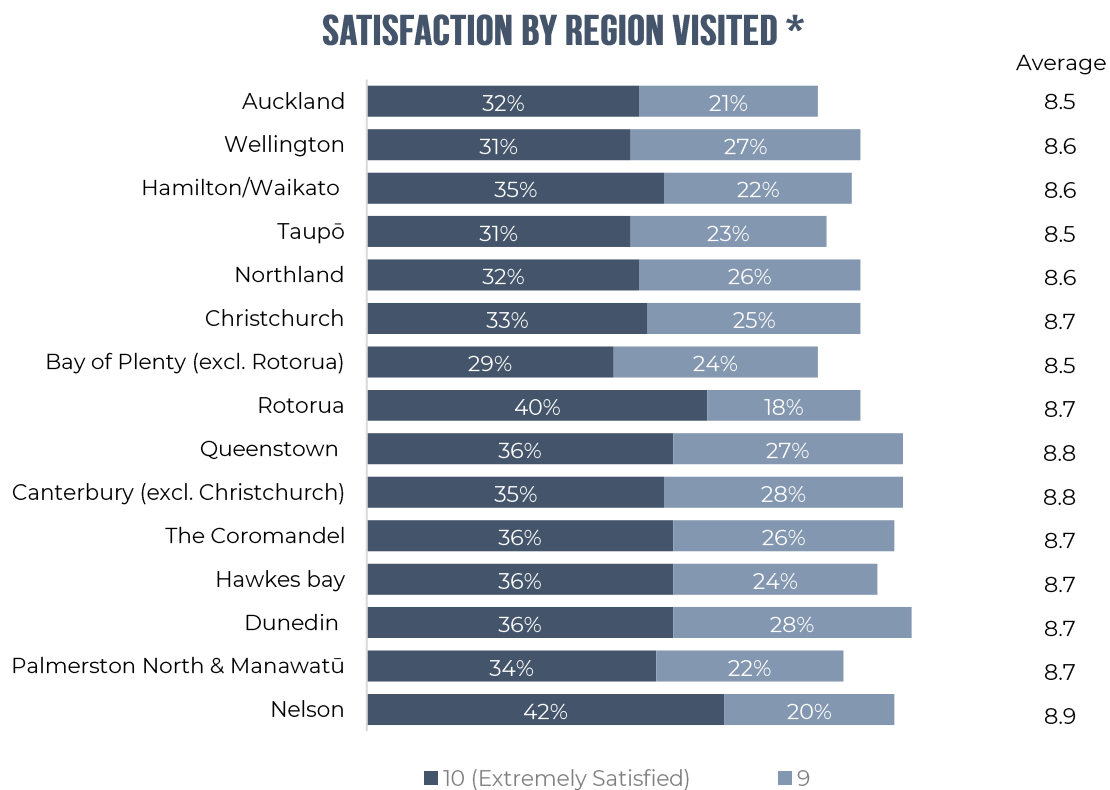
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE Mar 2020	YE Mar 2021	YE Mar 2022	YE Mar 2023	YE Mar 2024	YE Mar 2025
10 (Extremely satisfied)	35%	37%	34%	32%	31%	32%
9	24%	26%	23%	24%	23%	23%
8	24%	21%	25%	27%	27%	26%
7	11%	10%	10%	11%	12%	12%
6	3%	4%	5%	3%	4%	4%
5	2%	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	8.6
Base: Total Sample	n=2,183	n=2,187	n=2,273	n=2,396	n=2,350	N=2334



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?

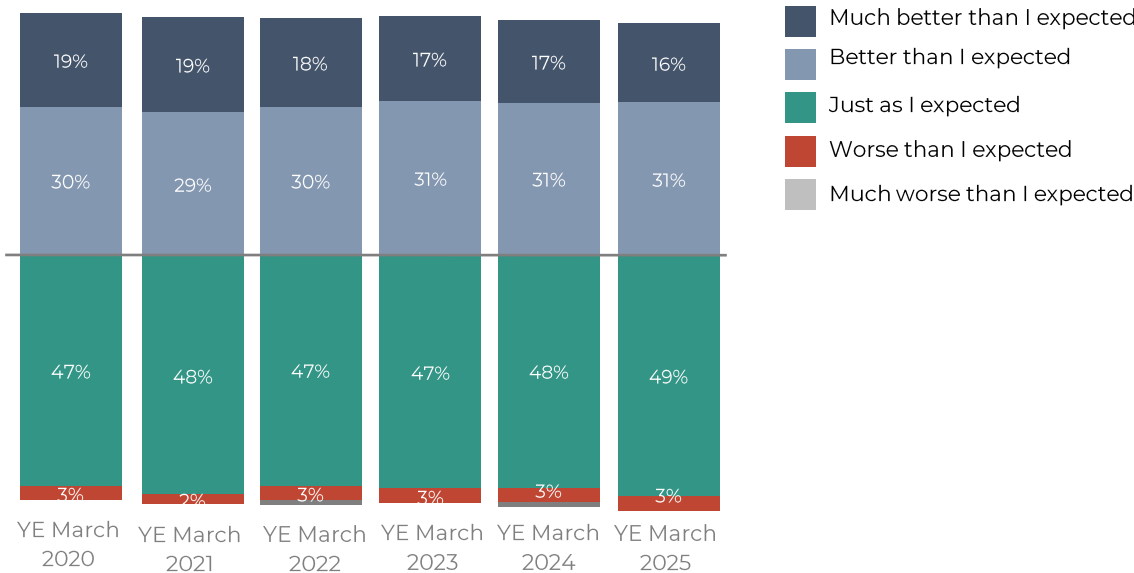


* Results for the 15 most commonly visited regions are displayed

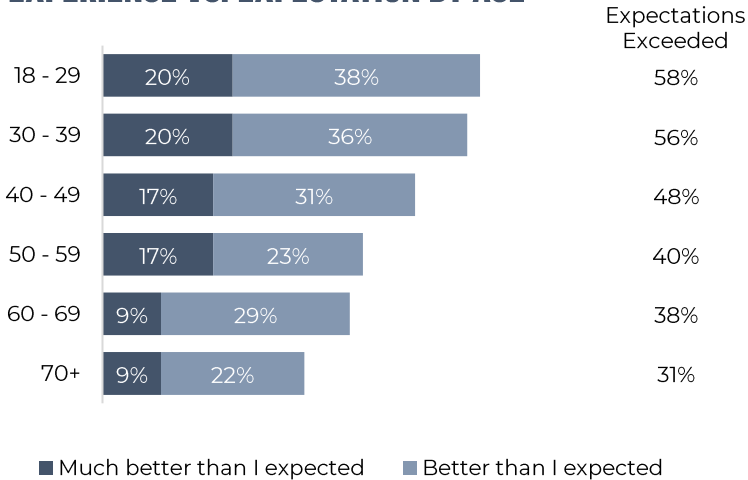
EXPERIENCE VS. EXPECTATION

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

47% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



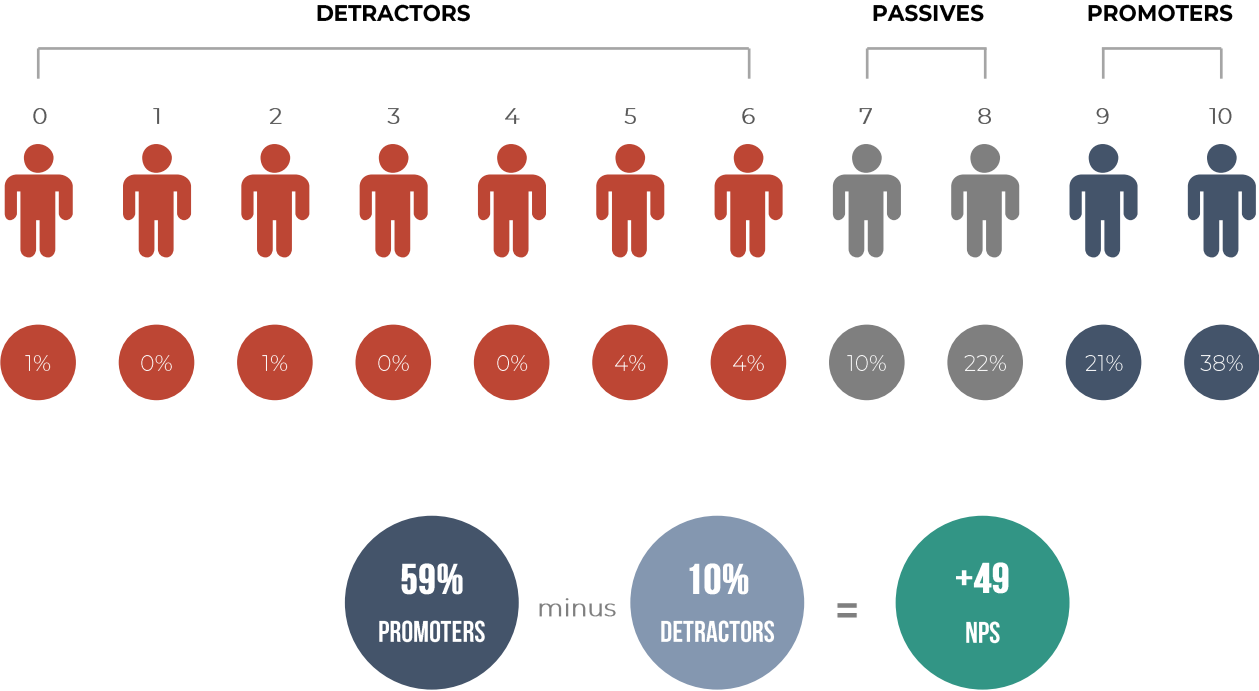
EXPERIENCE VS. EXPECTATION BY AGE



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.



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?

NPS YE MARCH 25

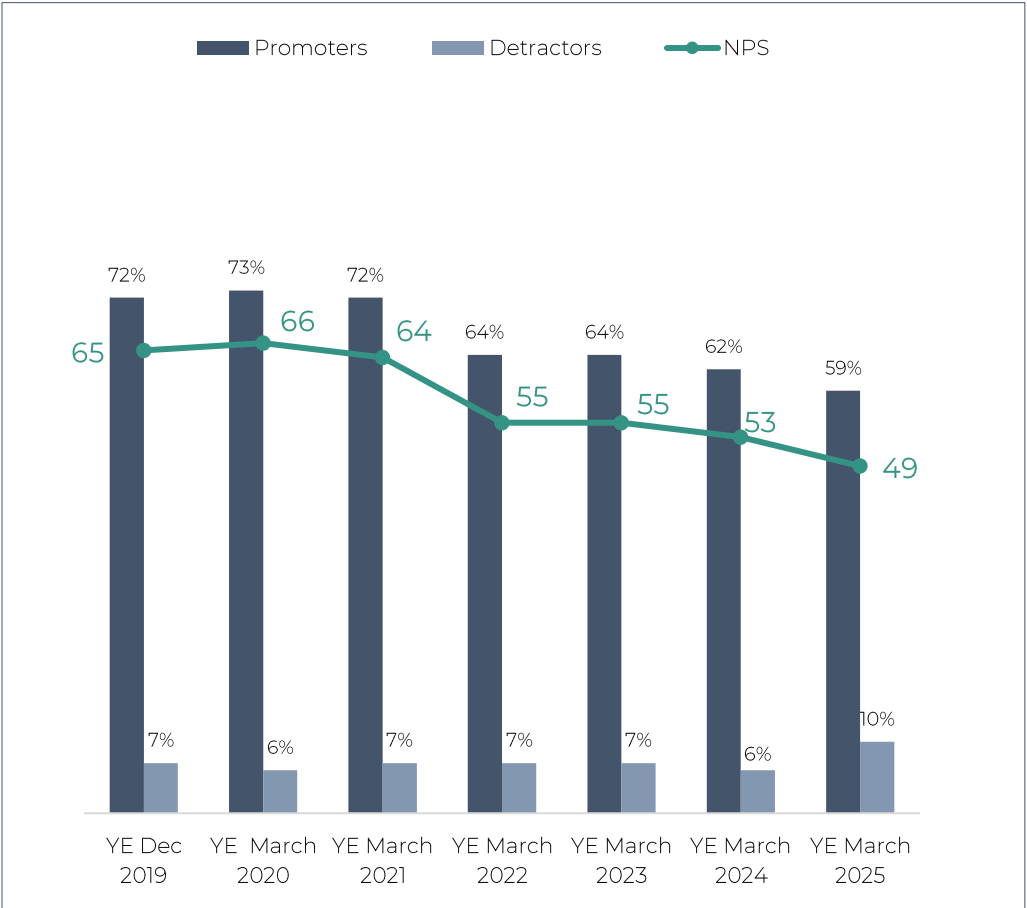
BY AGE

18-29 years	+ 39
30-39 years	+ 46
40-49 years	+ 46
50-59 years	+ 52
60-69 years	+ 57
70 years+	+ 69

BY REGION VISITED

(Top 15)	
Auckland	+48
Wellington	+48
Hamilton/Waikato	+52
Taupō	+50
Northland	+59
Christchurch	+50
Bay of Plenty (excl. Rotorua)	+54
Rotorua	+57
Queenstown	+52
Canterbury (excl. Christchurch)	+50
The Coromandel	+53
Hawkes bay	+58
Dunedin	+49
Palmerston North & Manawatū	+48
Nelson	+61

NPS TREND (2019-25)



NET PROMOTER SCORE (NPS) COMMENTS

For what reason/s did you rate your likelihood to recommend New Zealand as a holiday destination to New Zealanders in that way?

Themes from NPS comments	Total	Promoters	Passive	Detractors
Scenery and Environment	54%	59%	51%	26%
Wide Range of Activities	24%	25%	26%	6%
Friendliness of People and Safety	16%	18%	13%	0%
General Positive Experience	11%	11%	12%	16%
Convenience and Ease of Travel	8%	10%	5%	3%
Adventure and Outdoor Activities	7%	7%	6%	6%
Food and Dining	6%	8%	1%	3%
New Zealanders Should See New Zealand First	5%	6%	4%	3%
Poor Value for Money*	4%	1%	6%	32%
Cultural Experiences	4%	4%	4%	0%
Good Value for Money	4%	5%	1%	3%
Relaxing, Calm	3%	2%	4%	3%
Lack of Activities or Boring*	2%	0%	4%	10%
Contribute to Local Economy	1%	1%	1%	0%
Dangerous Roads, Infrastructure and Drivers*	2%	0%	1%	6%
Base: Quarter 1 2015	n=489	n=316	n=142	n=31

Blue - statistically higher vs Total sample at 95% confidence level

Red - statistically lower vs Total sample at 95% confidence level

- In the first quarter of 2025, the categories marked with an asterisk (*) represent the key reasons respondents provided for giving low Net Promoter Scores (NPS).
- Continuing a pattern seen in previous reporting periods, cost remained the most frequently cited barrier to recommending domestic travel within New Zealand.
- More than half of all comments positively referenced New Zealand's natural beauty. Many respondents who gave low scores still acknowledged the country's scenic appeal, while critiquing other aspects of their experience.

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?

"Beautiful sights to see for free, awesome activities on the way to Auckland and in the Auckland region. Beautiful weather, nice people to meet and lovely food along the way! New Zealand is a beautiful place to travel. I've been up and down the North and South Island twice now and I'd do it all over again without boredom."

"Everyone needs to see their own country! Travel broadens the mind and lets you experience things you might never have if you stayed home. You get to see how the rest of the country live and maybe learn to accept other people's culture!"

"A holiday in New Zealand offers a wide variety of experiences from active to laid back."

"New Zealand is already very familiar, but different towns and cities provide enough variety without having to go abroad for adventures."

"Aotearoa New Zealand is a beautiful place with many beautiful people and places. It would take me another lifetime just to see places I haven't been to before. Plus... no flying needed!"

"New Zealand has some great spots, especially away from the main centres. It's great exploring the smaller towns – you never know what you might find or experience. It also depends greatly on your mindset – if you are not looking for bells and whistles, you may well be surprised what is actually on offer."

"Having travelled all over the world, I know NZ has amazing scenery and people all within a small land mass that is very easy to travel around."

"There are so many beautiful places that we haven't explored. Do this rather than leaving the country to travel."

"New Zealand has some of the most beautiful scenery in the world, and most New Zealanders are friendly and helpful."

"It's beautiful, modern, safe and the people are great"

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?

"I feel like a lot of New Zealand is the same, so unless you're going somewhere specifically different to what you're used to, I would recommend going to a different country first before I would recommend New Zealand. Saying that, I do think New Zealand is a fun place to travel if you are not used to the bush or you are not used to the shopping centres."

"Depends what time of year, as locals don't get a price break when the prices are hiked up so high for overseas tourists. I always recommend off-season travel, otherwise it's just way too expensive to stay, eat and see sites – everything gets priced too high during the summer months, it's ridiculous."

"Bad roads, horrible drivers, passing lanes closed by NZTA to "improve traffic flow". What?"

"NZ is expensive and you could holiday overseas for the cost of a holiday here, depending on what your holiday is, e.g. hotel and flight prices are high, eating and drinking is expensive. Asia is much cheaper and more interesting."

"There are many beautiful places to visit in New Zealand but it has become so expensive to stay in hotels/motels etc. Add to that the cost of eating out and the overall cost well exceeds the budget. Very sad indeed for the average person."

"It's a pretty country to be sure, but the travel times between places are terrible!"

"Only worth going there if you know someone."

"Everything is far too expensive and NZ has lost its sparkle."

"Rip-off prices in so-called 'tourist centres'."

DOMESTIC VISITOR SATISFACTION (YE MARCH 2025)

DOMESTIC VISITOR SATISFACTION TRACKING

This report is based on data collected for the Domestic Visitor Satisfaction module of the Market Perceptions programme. It is a component of Angus & Associates' Visitor Insights Programme (VIP), which is an ongoing research programme revealing how New Zealanders and Australians think, feel and act in relation to 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 more than 5,000 New Zealand and Australian travellers is 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 2024 and March 2025.

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>

