

# DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING SEPTEMBER 2021

## KEY INSIGHTS

This report provides an overview of New Zealanders' most recent domestic leisure trip (taken within the 12 months prior to their survey completion). The data presents an aggregate view from surveys completed between **October 2020** and **September 2021** (meaning that the trip reported on may have taken place as far back as October 2019 or as recently as September 2021). The COVID-19 pandemic and associated lockdowns have impacted travel and tourism activity in New Zealand. Below are key insights for the year ending September 2021, in comparison with the previous year.

- Incidence of travel and reason for travel: The same proportion of New Zealanders, three out of four, took an overnight trip however the reasons for travelling have changed with **fewer** New Zealanders travelling to attend an **event** (17% to 11%), whether it be a public or private event. This likely reflects COVID-19 lockdowns affecting the number and type of events staged during the survey periods.
- Length of trip: There is no significant change in the length of trips undertaken. The average length is three nights.
- Destination market share: **Auckland** has seen the largest **decline** in market share of leisure trips falling from 24% to 21%. Several factors are likely to be influencing this change such as more Aucklanders visiting other regions, lockdowns specific to Auckland and fewer event trips occurring. **Hamilton/Waikato** and **Queenstown** gained the most market share **rising** from 10% to 13% and 7% to 10% respectively.
- Time of year: The proportion of trips made in **February** has **dropped** from 16% to 13%, while **April** has **increased** from 5% to 11%. It is not clear at this stage why this shift has occurred.
- Satisfaction: Satisfaction levels have remained the same with 62% of New Zealanders scoring their satisfaction level as 9 or 10 out of 10. Older New Zealanders and those on longer trips tend to be more satisfied than others.
- Experience vs Expectation: While satisfaction remains stable, an **increase** is evident in the proportion of New Zealanders that had their **expectations exceeded**. Compared with 47% last year, 52% of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip. In some cases expectations were exceeded due to lower levels of visitor activity in a destination. Despite generally being less satisfied, exceeded expectations are more likely to occur amongst younger New Zealanders.
- Net Promotor Score: **NPS** is used to measure an individual's propensity to recommend New Zealand as a holiday destination for other New Zealanders. NPS has **fallen** considerably compared with the previous year, from +68 to **+60**. It does however remain a very high score (the available range is +100 to -100). The change in NPS is driven by a lower proportion of 'promoters', rather than any significant change in the proportion of 'detractors'. Like satisfaction, NPS is lower for younger New Zealanders (despite a higher proportion of this group reporting that their expectations were exceeded).

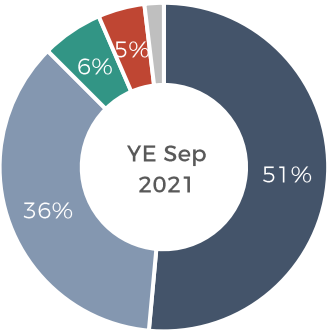
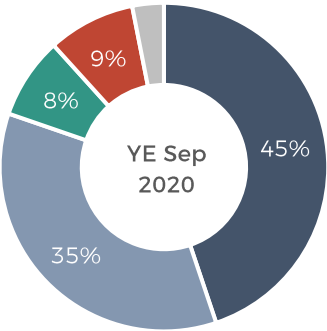
# PROFILE OF LAST DOMESTIC OVERNIGHT LEISURE TRIP

Thinking now about the last overnight trip that you have taken within New Zealand for leisure purposes...  
(i.e. excluding trips taken for the primary purpose of business, education, stopover, medical treatment and other non-leisure purposes)



**3 in 4** New Zealand residents took an overnight domestic leisure trip in the past 12 months.

## MAIN REASON FOR TRIP



- For a holiday or short-break
- To visit family or friends
- To attend an event held by friends or family (e.g. wedding, funeral, or reunion)
- To attend an event held by someone else (e.g. a sporting event, concert or festival)
- Other

	YE Sep 2020	YE Sep 2021
Length of Trip:		
1 Night	14%	14%
2 Nights	26%	24%
3 Nights	19%	20%
4 Nights	11%	11%
5 Nights	9%	9%
6 Nights	3%	3%
7 Nights (or more)	18%	19%
Average Number of Nights (Median)	3	3
Base: Total Sample	n=2,162	n=2,263

# DOMESTIC VISITOR SATISFACTION (YE SEPTEMBER 2021)

## 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?

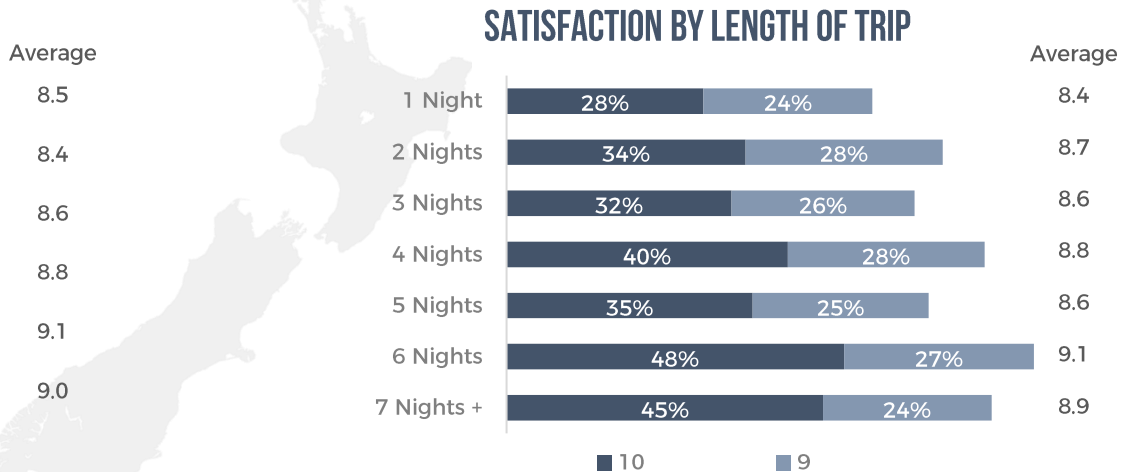
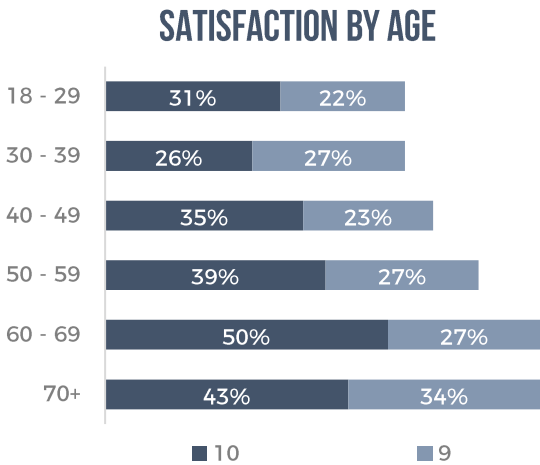
	YE Sep 2020	YE Sep 2021
Regions Visited (Top 15):		
Auckland	24%	21%
Wellington	14%	14%
Hamilton/Waikato (excluding Taupo and the Coromandel)	10%	13%
Northland	11%	12%
Bay of Plenty (excl. Rotorua)	10%	12%
Rotorua	11%	12%
Christchurch	10%	12%
Taupō	11%	10%
Queenstown	7%	10%
Canterbury (excl. Christchurch)	8%	9%
The Coromandel	8%	8%
Hawke's Bay	7%	7%
Palmerston North & Manawātū	5%	7%
Dunedin	6%	6%
Taranaki	5%	6%
Base: Total Sample	n=2,162	n=2,263

	YE Sep 2020	YE Sep 2021
Time of Year:		
January	19%	18%
February	16%	13%
March	10%	9%
April	5%	11%
May	5%	7%
June	8%	9%
July	9%	9%
August	7%	6%
September	9%	7%
October	9%	10%
November	11%	9%
December	12%	11%
Base: Total Sample	n=2,162	n=2,263

# 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?

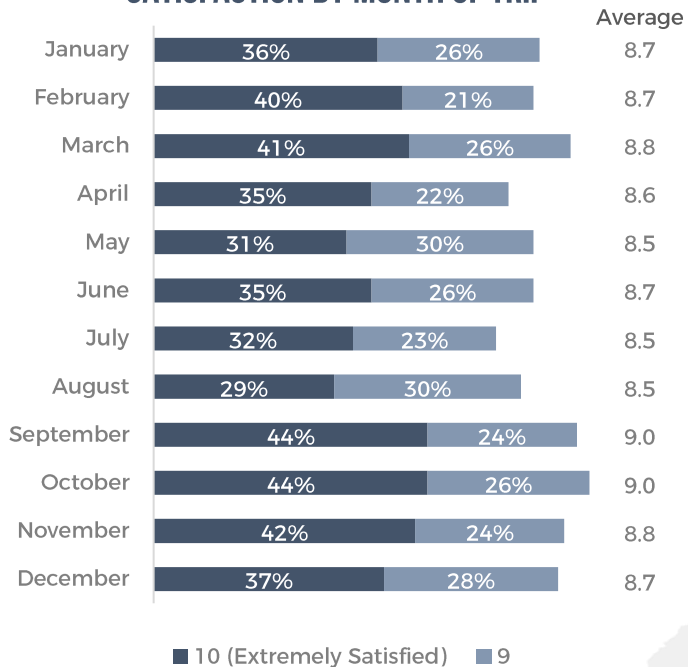
		Not at all satisfied						Extremely satisfied				
	Average	(1)	(2)	(3)	(4)	(5)	(6)	(7)	(8)	(9)	(10)	
Year Ending Sep 2020	8.7	0%	0%	0%	0%	1%	4%	10%	22%	25%	37%	
Year Ending Sep 2021	8.7	0%	0%	0%	0%	2%	4%	9%	22%	26%	36%	



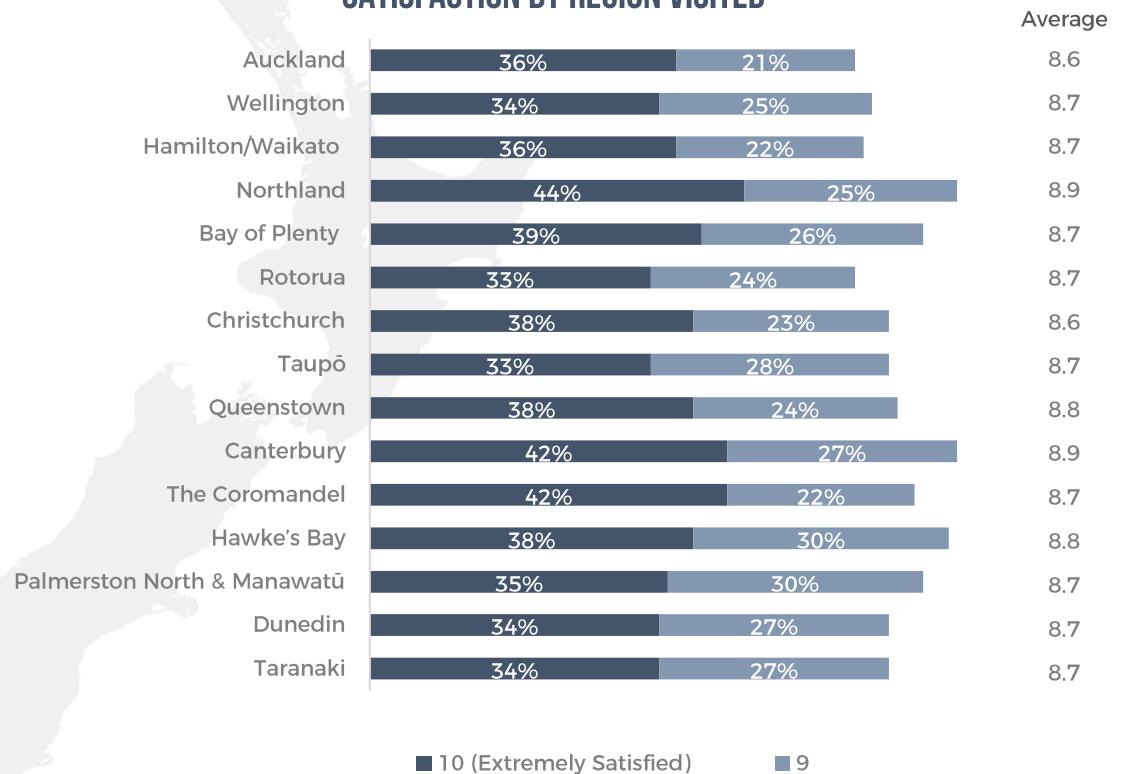
## OVERALL SATISFACTION

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 \*

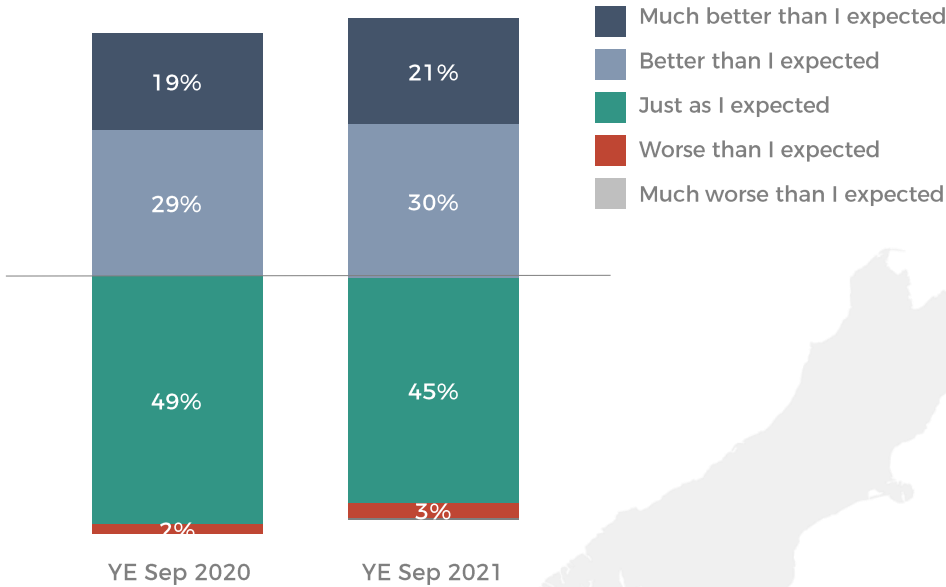


\* Included are the 15 most commonly visited regions

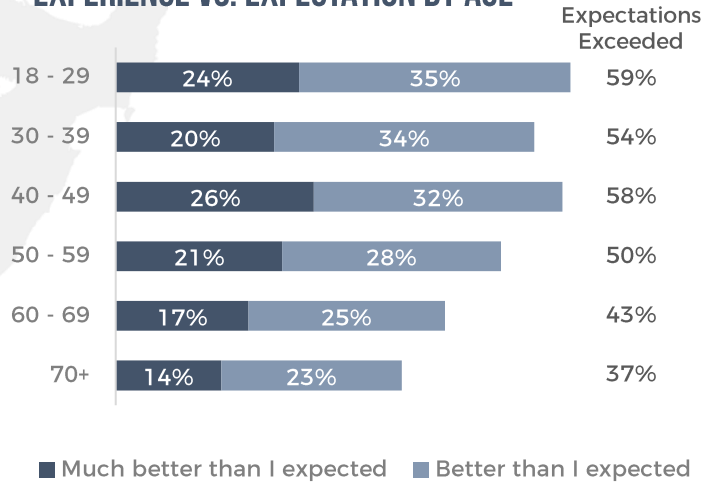
# EXPERIENCE VS. EXPECTATION

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

**52%** of New Zealanders had their expectations exceeded on their most recent domestic overnight leisure trip



## EXPERIENCE VS. EXPECTATION BY AGE



## COMMENTS (Q3 2021)

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



"9 out of 10 less people in Queenstown due to covid and it was easy to book hotels and places"

"Visited Akaroa lovely scenery and food"

"I liked the change in scenery and although the weather wasn't great I still found that I enjoyed the stay and the rural scenery. I gained a greater appreciation for rural New Zealand."

"The weather was excellent and the sightseeing was pristine at Doubtless Bay/Karekare Peninsula."

"There was no traffic for a long weekend, good price for accommodation and great host."

"Picton was great, I used to go there as a child to visit my Grandmother every Christmas. Was great to see it again. Nelson is a very lovely city. Tauranga was good fun and we stayed in a lovely AirBnB and went to a fantastic restaurant."

"Rotorua is usually full of overseas tourists, so it was a much more pleasurable experience to visit attractions without the throngs of foreign travellers."

"There is lots to do in Tauranga and I could have stayed longer. I plan to go back over summer to this area."

"Due to covid I expected less, but everything turned out very enjoyable"

"I find my visit to Christchurch very interesting and was pleased with the hotel accommodation"

"Wanaka was really buzzing with the Challenge Wanaka being on and it created a very exciting atmosphere"

"We flew to Wellington with Air NZ and the service on both flights was great. We saw parts of the region that we haven't seen before and explored new places which was amazing."



"The pandemic just started and I was at the risk of being lost in North Island. Thanks God, it was not as that but the staff from Air New Zealand at the airports in Tauranga and even in Christchurch have been awful."

"I was told the Bay of Islands was amazing, but it was a let down, with not much to do."

"Not many dog-friendly places in the Coromandel"

"Everything's overpriced and meeting with new people was not a great experience."

"Poor hotel booking process, too expensive, not enough staff or facilities within the local restaurants etc, ski field couldn't cope with the amount of people"

"Got locked down with covid outbreak"

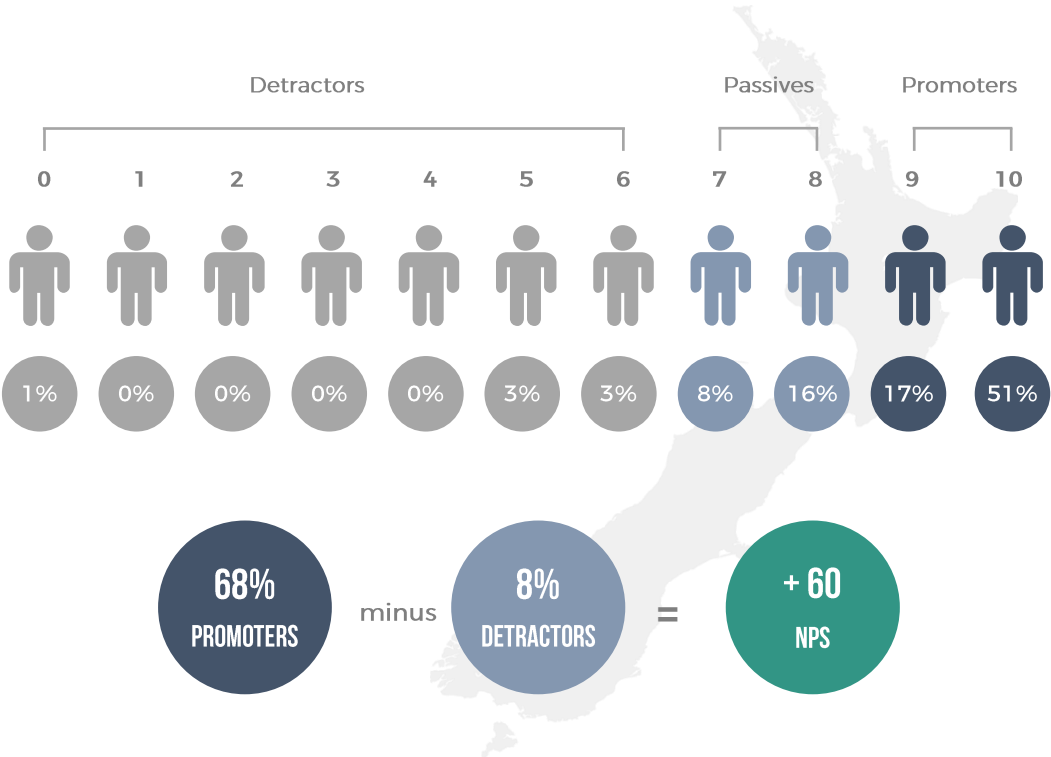
"Raining and too many road works."



# 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.



## NPS BY AGE

18-29 years	+ 46
30-39 years	+ 56
40-49 years	+ 54
50-59 years	+ 66
60-69 years	+ 75
70 years+	+ 77

There has been a substantial decline in the Net Promoter Score over the past year, driven by a lower proportion of promoters.

YE Sep 2020: NPS + 68  
YE Sep 2021: NPS + 60

DOMESTIC VISITOR SATISFACTION (YE SEPTEMBER 2021)

## 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. Angus & Associates is an independent research and strategy consultancy specialising in the tourism and leisure sectors.

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 n=4,800 New Zealand and Australian travellers are included in the programme each year (a monthly sample of n=200 New Zealanders and n=200 Australians), 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 October 2020 and 30 September 2021. The next update will be available in January 2022.

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>

