

# DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING SEPTEMBER 2022

## 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 October 2021 and September 2022 (meaning that the trip reported on may have taken place as far back as October 2020 or as recently as September 2022). Below are key insights for the survey year ending September 2022. 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. While this proportion has been relatively stable over time, some change is evident in reason for travel. Compared with YE Sep 2019 and YE Sep 2020, the proportion of New Zealanders travelling for holidays/short-breaks is significantly higher, while the proportion travelling to attend public and private events is lower. This likely reflects the impact of the COVID-19 pandemic on the number and type of events staged during the survey period, as well as the decreased ability of New Zealanders to holiday overseas.

### 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

Compared with YE Sep 2021, five regions in the North Island have experienced a decline in market share of domestic overnight leisure trips – Hamilton/Waikato (from 13% down to 10%), Bay of Plenty and Rotorua (from 12% down to 10%), Northland (from 12% down to 9%) and Taranaki (from 6% down to 4%).

While there hasn't been significant change compared with the preceding year, compared to earlier years:

- Auckland has experienced a decline in market share - currently 19%, down from 24% in YE Sep 2020 and 23% in YE Sep 2019.
- Two regions have experienced an increase in market share – Queenstown (currently 11%, up from 7% in YE Sep 2019 and YE Sep 2020), Palmerston North & Manawātū (currently 7%, up from 5% in YE Sep 2020).

## KEY INSIGHTS CONT.



### Satisfaction

A slight decrease in overall satisfaction is evident - 57% scored their overall satisfaction with their experience on their last overnight trip as 9 or 10 out of 10 in the most recent year compared to 62% in YE Sep 2021 and YE Sep 2020. 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 trip, and a similar proportion found it just as they expected. Only a very small proportion found it worse than expected. There is little change over time in these proportions. Factors that tend to influence experience include accommodation, transport, sense of value received, service levels and the post Covid situation.

### Net Promoter Score (NPS)

NPS is used to measure an individual's propensity to recommend New Zealand as a holiday destination for New Zealanders. NPS has decreased each year since YE Sep 2019. It is currently +55, down from +68 in YE Sep 2019. The change in NPS is being driven by a lower proportion of 'promoters' and an increase in the proportion of 'detractors'. 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

	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022
Main reason for trip				
For a holiday or short-break	44%	45%	51%	53%
To visit family or friends	36%	35%	36%	36%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	8%	8%	6%	5%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	9%	9%	5%	4%
Other	3%	3%	2%	3%
Base: Total sample	n=2,151	n=2,162	n=2,263	n=2,298

	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022
Length of Trip				
1 Night	12%	14%	14%	13%
2 Nights	27%	26%	24%	28%
3 Nights	19%	19%	20%	20%
4 Nights	11%	11%	11%	9%
5 Nights	10%	9%	9%	9%
6 Nights	3%	3%	3%	4%
7 Nights (or more)	16%	18%	19%	17%
Average Number of Nights (Median)	3	3	3	3
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298

# 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 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022
Regions Visited (Top 15):				
Auckland	23%	24%	21%	19%
Wellington	14%	14%	14%	13%
Taupō	11%	11%	10%	11%
Christchurch	11%	10%	12%	11%
Queenstown	7%	7%	10%	11%
Hamilton/Waikato	10%	10%	13%	10%
Bay of Plenty (excl. Rotorua)	10%	10%	12%	10%
Rotorua	12%	11%	12%	10%
Northland	13%	11%	12%	9%
Canterbury (excl. Christchurch)	8%	8%	9%	8%
The Coromandel	7%	8%	8%	7%
Hawke's Bay	7%	7%	7%	7%
Palmerston North & Manawātū	6%	5%	7%	7%
Dunedin	5%	6%	6%	5%
Taranaki	5%	5%	6%	4%
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298

	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022
Time of Year:				
January	16%	19%	18%	16%
February	11%	16%	13%	12%
March	12%	10%	9%	11%
April	12%	5%	11%	12%
May	8%	5%	7%	10%
June	8%	8%	9%	10%
July	8%	9%	9%	9%
August	9%	7%	6%	6%
September	9%	9%	7%	5%
October	9%	9%	10%	5%
November	8%	11%	9%	6%
December	10%	12%	11%	9%
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298

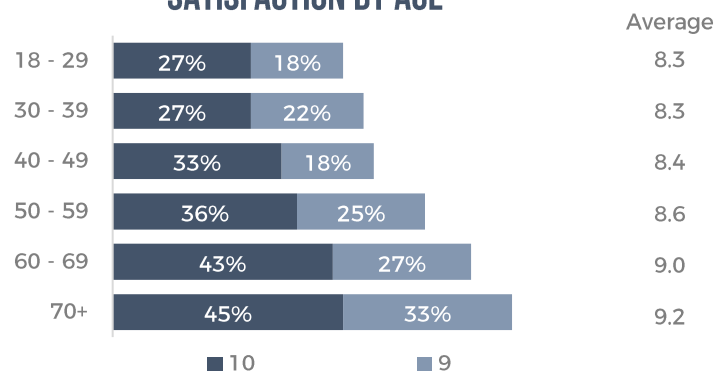


# OVERALL SATISFACTION

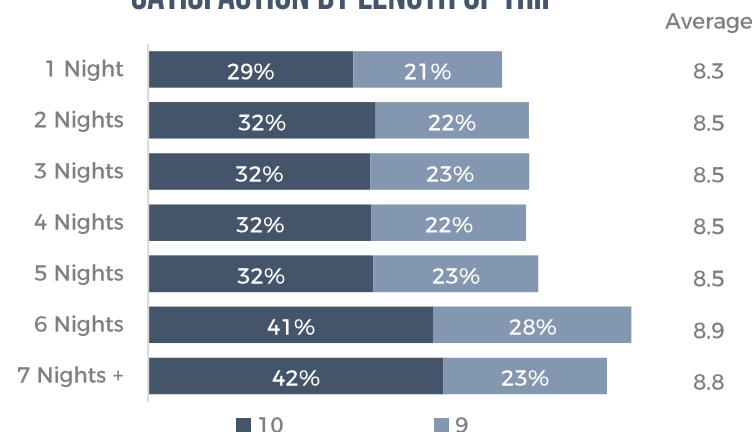
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022
10 (Extremely satisfied)	34%	37%	36%	34%
9	23%	25%	26%	23%
8	25%	22%	22%	26%
7	10%	10%	9%	10%
6	4%	4%	4%	4%
5	2%	1%	2%	3%
4	1%	0%	0%	1%
3	0%	0%	0%	0%
2	0%	0%	0%	0%
1 (Not at all satisfied)	0%	0%	0%	0%
Average	8.6	8.7	8.7	8.6
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298

## SATISFACTION BY AGE



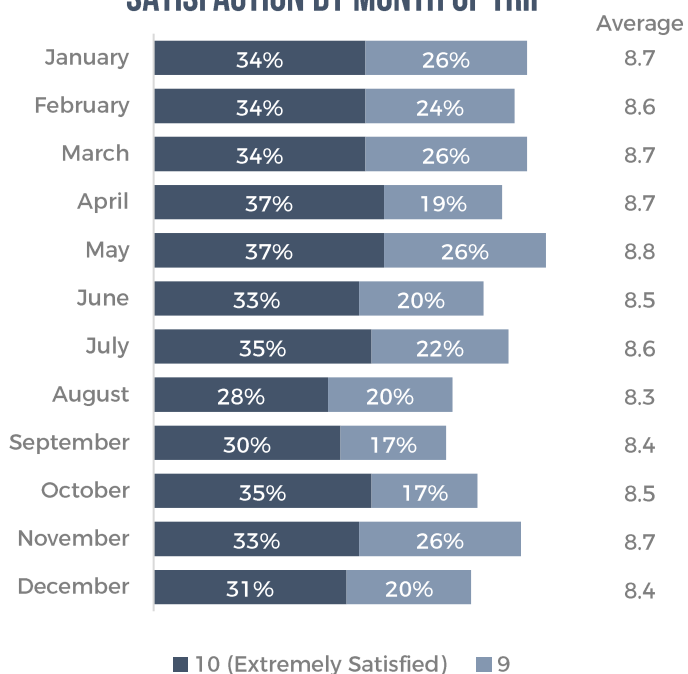
## SATISFACTION BY LENGTH OF TRIP



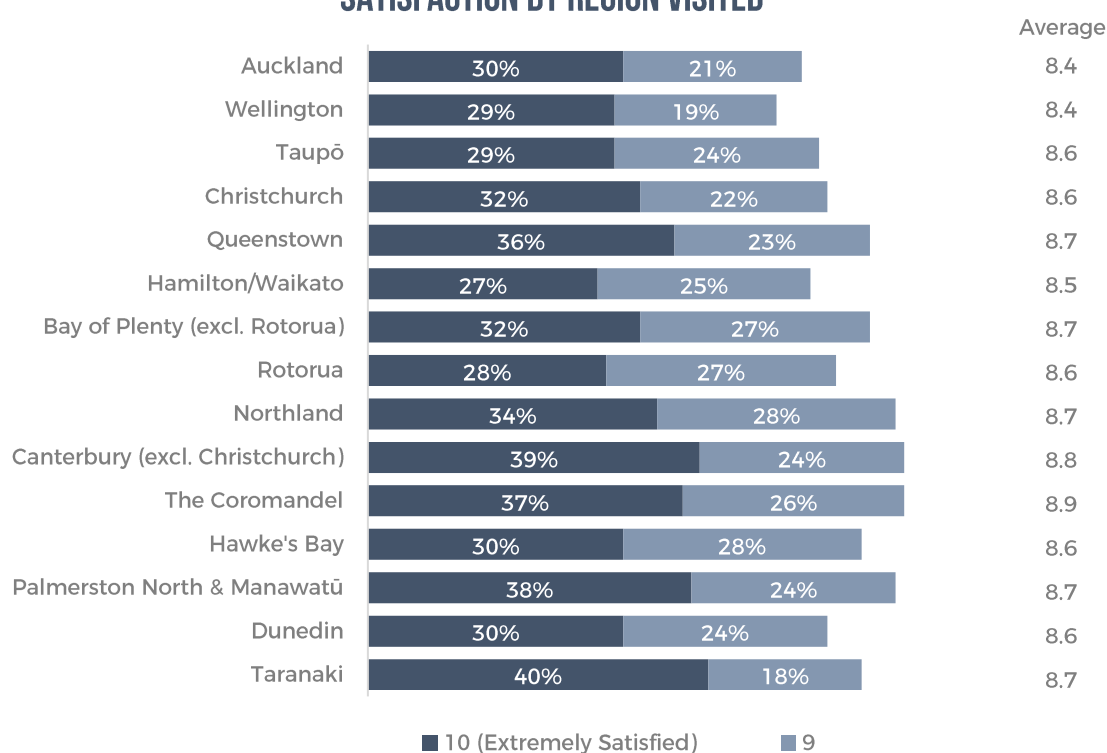
# OVERALL SATISFACTION

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 \*

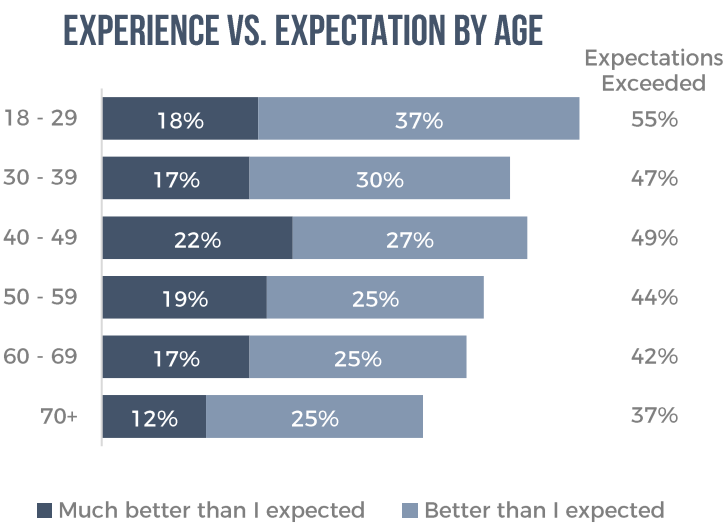
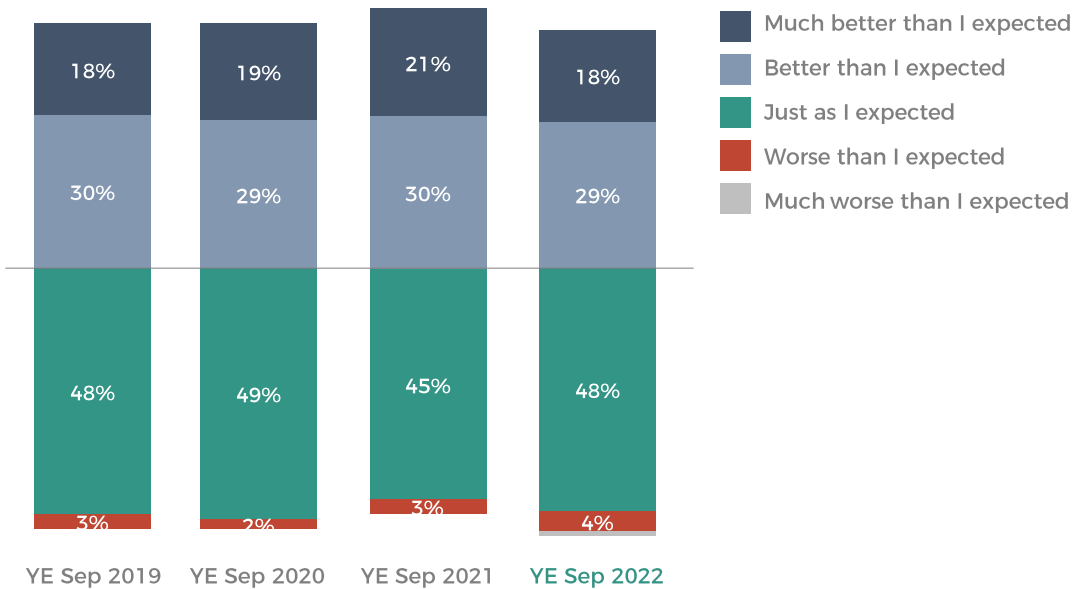


\* Results for the 15 most commonly visited regions are displayed

# EXPERIENCE VS. EXPECTATION

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

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





## COMMENTS (Q3 2022)

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

### ACCOMMODATION

"The accommodation was very nice for the price I paid, and the proprietors were very friendly and welcoming"

"Good budget accommodation"

"The hotel did not measure up (supposedly a 4-star hotel but definitely was not) and the weather made visiting extremely unpleasant."

"Poor hotel service a premium rate"

### PRICE/VALUE

"Nothing special happened and it was too expensive"

"Great food but accommodation costs are way too high, we can go abroad for less"

"Good break but expensive"

"Need a holiday and the timing was perfect. Didn't spend much money and still had a good time."

"It was all worth it - the accommodation, food sceneries, and activities."

### POST COVID

"Weather was great and no COVID restrictions"

"I have only just started travelling around the country since things have started to settle from Covid lockdowns and alert levels. I was unsure what to expect, and was pleased that things have returned to normal"

"Great to finally get away from post covid restrictions. Mask mandates reduced which made the whole experience more enjoyable"

### TRAFFIC/TRANSPORT

"Kind of used to flight delays at the moment, but everything went smoothly"

"We got to go on the new part of the Waikato Expressway, traffic was good, and it was good to see friends"

"Less foreign tourists creating havoc on the roads made for very pleasant driving and it was less crowded than normal"

### PLACES

"I thought I would get lost and have trouble driving due to heavy city traffic, but the Auckland roads and general system (road signage directions etc.) were organized and clear to follow so driving around the city turned out to be nowhere near as tricky as I had anticipated."

"Loved visiting the new Christchurch city - so many more things to do, eateries, new buildings"

"Because I had never even been to the South Island before let alone Queenstown. It blew me away"

### OVERALL EXPERIENCE

"Plenty to see, people post Covid welcoming, accommodation good, views spectacular"

"Accommodation was better than expected. Shopping and activities available were also beyond expectations."

"More things to do and see than initially thought there would be. Weather was good the whole time and didn't encounter any unexpected issues or delays on the 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 Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022
Promoters	10 (Extremely likely)	57%	60%	51%	47%
	9	16%	15%	17%	17%
Passive	8	14%	12%	16%	18%
	7	8%	6%	8%	9%
Detractors	6	2%	3%	3%	4%
	5	2%	3%	3%	3%
	4	0%	0%	0%	0%
	3	0%	0%	0%	1%
	2	0%	0%	0%	0%
	1	0%	0%	0%	0%
	0 (Not at all likely)	1%	1%	1%	1%
NPS		+68	+68	+60	+55
Base:		n=2,151	n=2,162	n=2,263	n=2,298

## NPS BY AGE

18-29 years	+ 43
30-39 years	+ 49
40-49 years	+ 47
50-59 years	+ 56
60-69 years	+ 72
70 years+	+ 77

## 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 October 2021 and September 2022. The next update will be available in January 2023.

For more information about these findings, and the Visitor Insights Programme, please contact:



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