

DOMESTIC VISITOR SATISFACTION

UPDATE: YEAR ENDING SEPTEMBER 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 October 2022 and September 2023 (meaning that the trip reported on may have taken place as far back as October 2021 or as recently as September 2023). Below are key insights for the survey year ending October 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 trip during the survey period, which has remained relatively stable over time. However, the reason for travel has changed slightly, likely returning to pre-Covid levels. 47% travelled domestically for a holiday or short break, significantly lower than it has been for the past two years. Meanwhile, travel to attend an event held by friends or family (e.g. weddings, funerals or reunions) and events organised by someone else (e.g. sporting events, concerts or festivals) has increased – to eight percent and seven percent respectively.

Length of trip

The median length of a domestic leisure trip is three nights, which has been stable over time. Two in five domestic travellers spent four nights or more away from home on their last overnight trip.

Destination market share

Auckland, Wellington and Hamilton/Waikato are the regions most likely to have been visited, together accounting for half of all recent domestic trips. There has been no significant changes in destination market share over the past year. Looking across the past five years, this most recent trip data suggests that Northland has seen a decline in domestic visitors and Christchurch an increase.

KEY INSIGHTS CONT.



Satisfaction

Domestic visitor satisfaction remains high at 8.5 out of 10. However, 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 Sep 2023, down from 34% in YE Sep 2022 or 37% in YE Sep 2020). Older New Zealanders continue to be more satisfied than younger New Zealanders, as do those taking longer trips (3+ nights).

Experience vs Expectation

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 for New Zealand is currently +54, indicating that there are considerably more advocates for domestic travel than there are detractors. The most common reasons for the NPS scoring are the variety of things to do and visit, the natural environment/scenery and the friendly and welcoming people they encounter.

Over the last five years the Net Promoter Score has been decreasing (down from a high of +68 in YE Sep 2020), as the proportion of New Zealanders advocating for domestic travel declines. The increasingly high cost of travel is the number one reason given by those unlikely to recommend New Zealand as a holiday destination for New Zealanders. Other mentions included concerns around safety/crime and poor quality or dated accommodation.

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 Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022	YE Sep 2023
For a holiday or short-break	44%	45%	51%	53%	47%
To visit family or friends	36%	35%	36%	36%	35%
To attend an event held by friends or family (e.g. wedding, funeral, or reunion)	8%	8%	6%	5%	8%
To attend an event held by someone else (e.g. a sporting event, concert or festival)	9%	9%	5%	4%	7%
Other	3%	3%	2%	3%	3%
Base: Total sample	n=2,151	n=2,162	n=2,263	n=2,298	n=2,439

LENGTH OF TRIP	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022	YE Sep 2023
1 Night	12%	14%	14%	13%	12%
2 Nights	27%	26%	24%	28%	26%
3 Nights	19%	19%	20%	20%	19%
4 Nights	11%	11%	11%	9%	12%
5 Nights	10%	9%	9%	9%	10%
6 Nights	3%	3%	3%	4%	4%
7 Nights (or more)	16%	18%	19%	17%	17%
Average Number of Nights (Median)	3	3	3	3	3
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298	n=2,439

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 Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022	YE Sep 2023
Auckland	23%	24%	21%	19%	24%
Wellington	14%	14%	14%	13%	13%
Hamilton/Waikato	11%	11%	10%	11%	12%
Rotorua	11%	10%	12%	11%	11%
Christchurch	7%	7%	10%	11%	11%
Taupō	10%	10%	12%	10%	10%
Queenstown	10%	10%	13%	10%	10%
Bay of Plenty (excl. Rotorua)	12%	11%	12%	10%	10%
Canterbury (excl. Christchurch)	8%	8%	9%	8%	9%
Northland	13%	11%	12%	9%	9%
The Coromandel	7%	8%	8%	7%	7%
Hawke's Bay	7%	7%	7%	7%	6%
Dunedin	5%	6%	6%	5%	6%
Palmerston North & Manawātū	6%	5%	7%	7%	6%
Taranaki	5%	5%	6%	4%	5%
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298	n=2,439

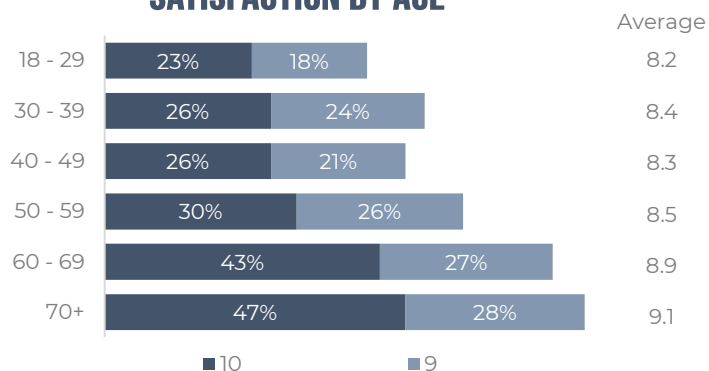
TIME OF YEAR	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022	YE Sep 2023
January	16%	19%	18%	16%	17%
February	11%	16%	13%	12%	11%
March	12%	10%	9%	11%	11%
April	12%	5%	11%	12%	11%
May	8%	5%	7%	10%	8%
June	8%	8%	9%	10%	8%
July	8%	9%	9%	9%	10%
August	9%	7%	6%	6%	7%
September	9%	9%	7%	5%	7%
October	9%	9%	10%	5%	9%
November	8%	11%	9%	6%	7%
December	10%	12%	11%	9%	10%
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298	n=2,439

OVERALL SATISFACTION

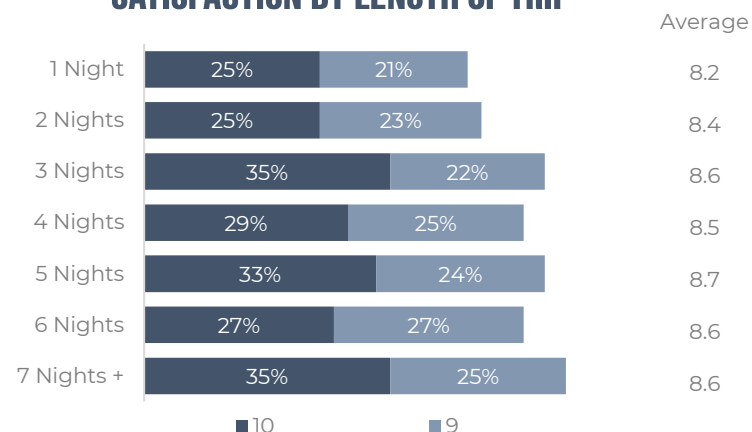
On a scale of 1 (not at all satisfied) to 10 (extremely satisfied), how satisfied were you with your overall experience on your last overnight trip within New Zealand?

	YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022	YE Sep 2023
10 (Extremely satisfied)	34%	37%	36%	34%	31%
9	23%	25%	26%	23%	23%
8	25%	22%	22%	26%	27%
7	10%	10%	9%	10%	12%
6	4%	4%	4%	4%	3%
5	2%	1%	2%	3%	2%
4	1%	0%	0%	1%	0%
3	0%	0%	0%	0%	1%
2	0%	0%	0%	0%	0%
1 (Not at all satisfied)	0%	0%	0%	0%	0%
Average	8.6	8.7	8.7	8.6	8.5
Base: Total Sample	n=2,151	n=2,162	n=2,263	n=2,298	n=2,439

SATISFACTION BY AGE



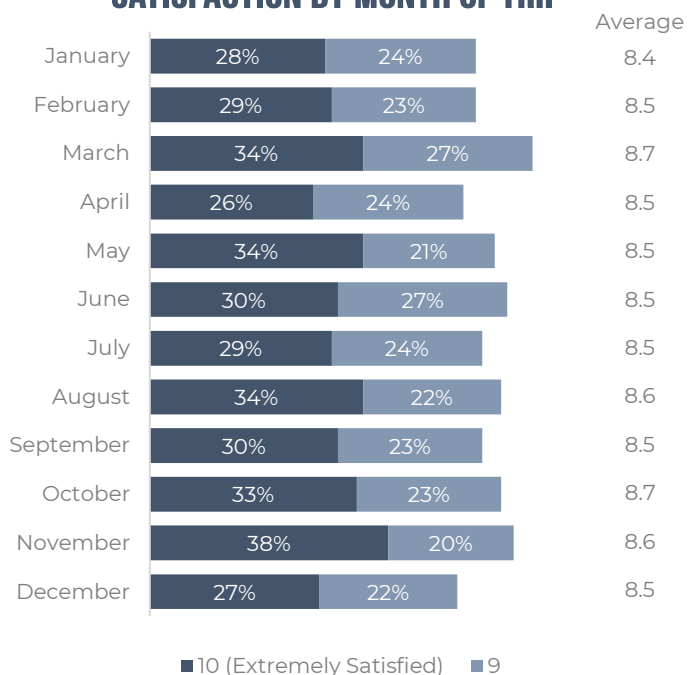
SATISFACTION BY LENGTH OF TRIP



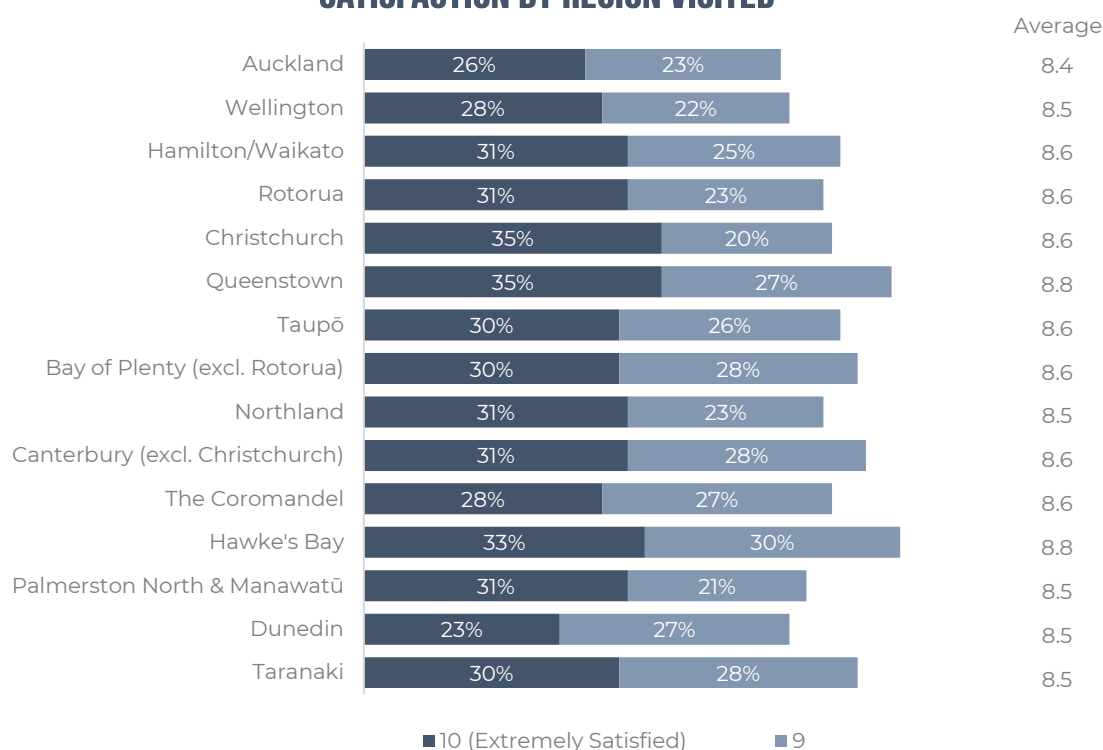
OVERALL SATISFACTION

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 *

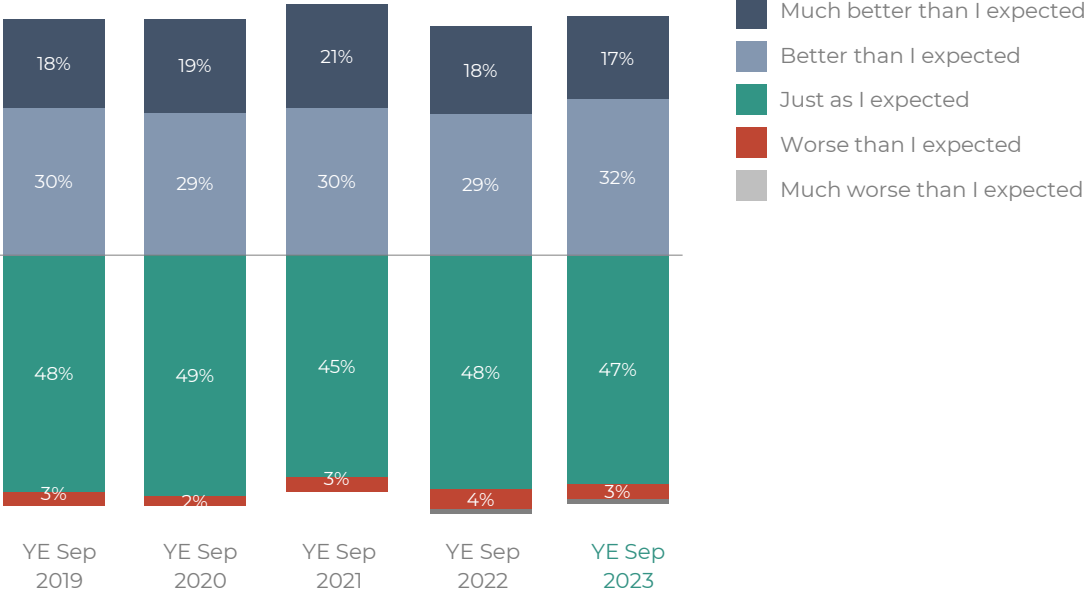


* Results for the 15 most commonly visited regions are displayed

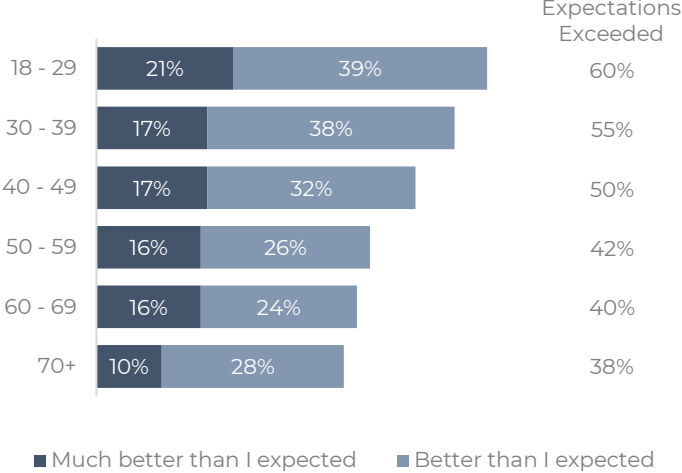
EXPERIENCE VS. EXPECTATION

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

49% 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.

		YE Sep 2019	YE Sep 2020	YE Sep 2021	YE Sep 2022	YE Sep 2023
Promoters	10 (Extremely likely)	57%	60%	51%	47%	44%
	9	16%	15%	17%	17%	19%
Passive	8	14%	12%	16%	18%	19%
	7	8%	6%	8%	9%	10%
Detractors	6	2%	3%	3%	4%	4%
	5	2%	3%	3%	3%	3%
	4	0%	0%	0%	0%	0%
	3	0%	0%	0%	1%	0%
	2	0%	0%	0%	0%	0%
	1	0%	0%	0%	0%	0%
	0 (Not at all likely)	1%	1%	1%	1%	1%
NPS		+68	+68	+60	+55	+54
Base:		n=2,151	n=2,162	n=2,263	n=2,298	n=2,439

NPS BY AGE

18-29 years	+ 36
30-39 years	+ 49
40-49 years	+ 50
50-59 years	+ 61
60-69 years	+ 62
70 years+	+ 78

Themes from NPS comments	
Variety of things to do and visit	25%
Natural environment and scenery	23%
Beautiful country	18%
Great holiday/experience	11%
Friendly and welcoming people	7%
Pricing - too expensive	5%
Ease and accessibility	5%
New Zealanders seeing their own home country	4%
Hospitality + customer service	4%
Great beaches	3%
Best country in the world	3%
Accommodation	3%
Safe country	3%
Pricing - value for money	2%
Supporting the local economy	2%
Clean	1%
Relaxing Break/Getaway	1%
Weather	1%
Not too busy or crowded	1%
Something for everyone	1%
Crime concerns	1%
Other	8%
Base: Q3 2023	
n=588	



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?

"It is better to spend our money in NZ if we can - All of NZ is struggling these days - so lets help out our one folk first. We have some of the best places in the world."

"Most New Zealanders living in New Zealand have live in New Zealand nearly there whole life but have not travel outside of there only town or have not travel to the other part of New Zealand. So they have don't know what are they miss out on and they don't know how beautiful is New Zealand."

"We love Taupo, its friendly with lots of activities to do for individuals and families"

"There is so much variety within a short distance (compared to some countries) that all tastes can be met"

"We live in such a beautiful country that there isn't much need to go anywhere else, at least if you enjoy natural beauty. You can save a lot of money and stress by just holidaying in New Zealand instead of flying overseas."

"The hospitality was amazing. Our hosts could not have been more helpful. The cost of accommodation though was really expensive."

"Great place to venture around and create more memories with the children"

"Beautiful scenery, great local restaurants, markets and food vendors. Wonderful hospitality."

"It has great scenery, beautiful beaches and variety of accommodation options from camping to hotels"

"New Zealand has beautiful beaches, scenery, history and landscapes, ideal for fast pace adventure or leisurely exploring"

"It was a good location with good warm weather with lots of family friendly locations such as parks and beaches. It was a quiet area and not too crowded in city centres and people were friendly."

"There are plenty of places in NZ where nature has gifted and being present at those places is like a lifetime experience. This country has great waterfalls, beaches, mountains, ice skiing mountains, historical places, caves and many more. It's a small country that can be traveled from top to end in 24 hours. just take your caravan and enjoy the road trip."

"New Zealand is our backyard and there is a lot to see from the sea to the mountains. There are beautiful lakes and rivers and many activities to take part in. New Zealand is a very safe country and the people are friendly. Wherever your are you are never too far from home."

"There is so much variety in both Summer and Winter"

"NZ is a safe and easy place to travel. The roads are generally good and the airlines and ferries operate with a high level of safety. Accommodation is mostly excellent and the scenery exceptional and there are cool things to experience everywhere."

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?

"Our country has many excellent sights to see, if you are not struggling with the cost of living and can afford to go see them"

"I think New Zealand is expensive for what you get, and this year the weather hasn't been conducive to a relaxing holiday"

"It's a beautiful country, but prices are horrendous, there is a lot of racism and the political landscape is controversial. Weather has also been rather undesirable. NZ is not what it used to be."

"There are lots of other scenic places in the world and NZ infrastructure such as roading leaves a bit to be desired"

"NZ is a wonderful country with magnificent sights, pity about the cost of living and state of the roads"

"It is great to see but very expensive compared to travelling overseas"

"NZ is fine for attractions in the major cities but in the rural areas there is nothing to do, this was backed up by the Spanish Womens Football World Cup Team leaving Palmerston North because it was boring"

"Too many road works and traffic cones"

"You can have all sorts of experiences across the country. People are friendly. However it is expensive and can be hard to get around."

"Becoming unaffordable for many to pay for petrol, travel fares, accommodation, activities, shopping, food etc etc"

"Internal flight prices can be very high and the value for money for accommodation is not great"

"Roads in poor shape"

"It's cheaper to go to Australia"

"There is some beautiful scenery and a bit to do here but it is as expensive as going overseas and discovering something totally different"

"There are so much variety in sights and sounds, however food is lacking in most of South Island"

"New Zealand isn't as great as what is claimed, there are far better towns, cities and scenery overseas"

DOMESTIC VISITOR SATISFACTION (YE SEPTEMBER 2023)

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 2022 and September 2023. The next update will be available in January 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>

