



VISITOR INSIGHTS PROGRAMME
DOMESTIC VISITOR SATISFACTION MODULE

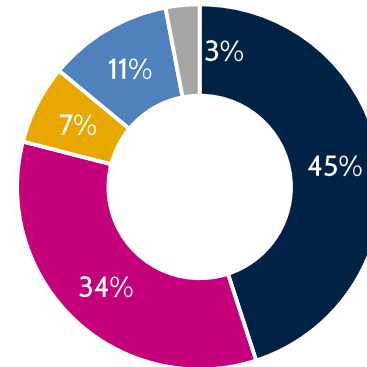
Year Ending March 2019 Update





69% of New Zealanders travelled domestically for leisure purposes within the past 12 months

Main reason for leisure travel:



- Holiday or short-break
- Visit family or friends
- Attend an event held by friends or family
- Attend an event held by someone else
- Other

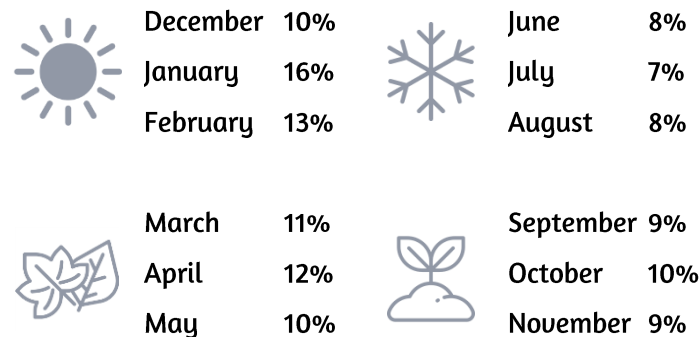
Top 10 Regions Visited on Last Overnight Trip

- 23%** Auckland
- 14%** Wellington
- 13%** Northland
- 12%** Rotorua
- 11%** Hamilton/Waikato
- 11%** Taupo
- 11%** Christchurch
- 11%** Bay of Plenty
- 8%** Coromandel Peninsula
- 8%** Canterbury

4.5 nights

New Zealanders who travelled domestically for leisure purposes within the past 12 months stayed an average of **4.5 nights** away from home on their last overnight trip

Time of Year of Last Overnight Trip:



8.7 out of 10

(1 = not at all satisfied – 10 = extremely satisfied)

Satisfaction averaged 8.7 out of 10 (on last leisure trip)



59% of domestic leisure travellers rated their last overnight trip 9 or 10 out of 10



Experience vs. Expectations:



47% of domestic travellers had their expectations exceeded

Reasons for Rating (Comments from Q1 2019 Respondents):

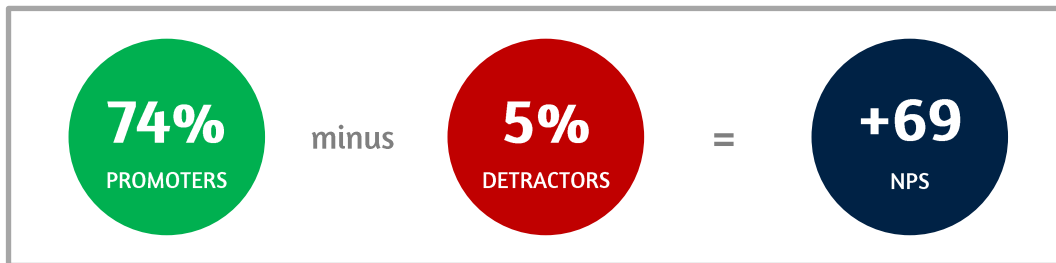
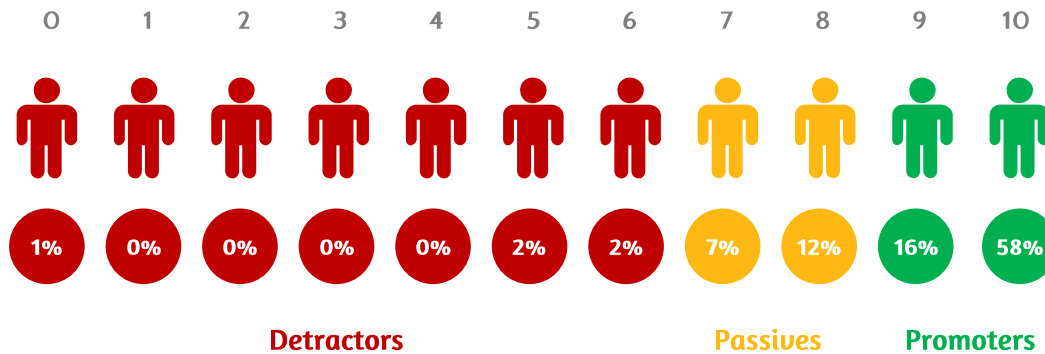
Worse	Better	Much Better
<p>Most responses cited personal reasons, however accommodation was also mentioned</p> <p>“Issues with accommodation in both Rotorua and Taupo”</p> <p>“The motel in Whakatane was absolutely fantastic. The motels in Gisborne and Hastings were below standard”</p> <p>“Was planning to go to the West Coast on the Tranzalpine train but the train was cancelled due to floods in Greymouth”</p> <p>“The motel I booked with was rather tacky in person Bad accommodation”</p> <p>“I had pre-booked my accommodation and they had misplaced booking”</p> <p>“So I ended up breaking my ankle - the hospital service was really poor”</p>	<p>“There was a lot of wild life present in our surroundings. Much more than our expectations”</p> <p>“Didn't know how beautiful Dunedin is and how much there is to do there”</p> <p>“Traffic was not as bad as expected, easy to get around and our accommodation was lovely”</p> <p>“I had never been to Stewart Island/Rakiura before, and I was very uncertain about the location of our accommodation. In fact, it was perfect. The whole experience (the people, the activities) was better than I had hoped for”</p> <p>“I thought Northland was looking cared for and better than previous time”</p> <p>“The country side scenery was amazing. The people are very friendly and helpful”</p> <p>“I hadn't visited Christchurch in a long time as I used to live there and everything was very different and upscaled, more new and stylish and colourful”</p> <p>“Beautiful sceneries in Marlborough and the seals were awesome to see for free of charge”</p> <p>“Comfortable, easy to get around, not too expensive”</p>	



Net Promoter Score:

The Net Promoter Score (NPS) is an indicator used globally to measure customer engagement and loyalty, based on the likelihood of a customer recommending a product or service. Any positive score means that there are more loyal advocates willing to recommend a 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.

How likely are you to recommend New Zealand as a holiday destination to others?



Year Ending March 2019 Update

Almost 70% of New Zealanders travelled domestically for leisure purposes within the past 12 months, with the summer period reporting the greatest proportion of last overnight trips (39%).

Just under one in every two people who travelled domestically in the past 12 months for leisure purposes had their expectations exceeded, with only 2% having an experience worse than their expectations.

Of those whose expectations were exceeded, a wide range of reasons were cited however destinations performing better than anticipated and the scenery were common themes. For those that had an experience worse than expected, most responses mentioned accommodation.

Overall, domestic visitor satisfaction for the year ending March 2019 was 8.7 out of ten, with a high NPS score of +69 recorded. These metrics continue to indicate the positive experience of domestic leisure travellers in New Zealand.

When comparing data by quarters, domestic travellers in Q1 2019 stayed an average 5.4 nights away from home on their last overnight trip (compared with 4.5 nights in Q1 2018). On domestic travellers' last overnight trip, more people travelled to the Bay of Plenty (13%, from 8%) and travelled in August (6%, from 3%) – again comparing Q1 2019 to Q1 2018. All other findings remained consistent across quarters.



Angus & Associates is an independent research and strategic planning consultancy specialising in tourism and leisure. The Visitor Insights Programme (VIP) is our ongoing programme revealing how New Zealand's visitors think, feel and act.

The Visitor Perceptions programme (the online component of the VIP) 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 Visitor Perceptions programme offers subscribers a cost-effective approach to profiling visitors to their region and to monitoring and benchmarking communication awareness and brand perceptions, through a syndicated survey of the domestic and Australian travel markets.

The Visitor 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 SSI's consumer panel. Respondents must be aged 18+ years and must have travelled overnight within the past 12 months to participate in the research. Quotas based on New Zealand and Australian census data (region of residence, gender and age) have been set to ensure a representative and consistent sample to accurately monitor changes over time.

For 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 April 2018 and 31 March 2019. The next update will be available in July.

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

Tourism Industry Aotearoa
Bruce Bassett
bruce.bassett@tia.org.nz

Angus & Associates
(04) 499 2212
vip@angusassociates.co.nz

