



VISITOR INSIGHTS PROGRAMME
DOMESTIC VISITOR SATISFACTION MODULE

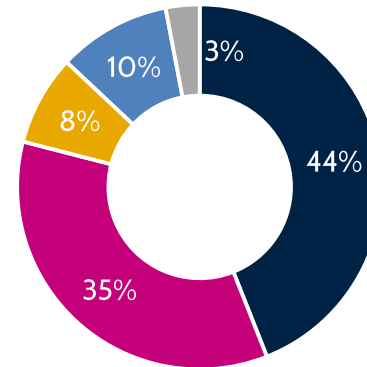
January – December 2018 (Full Year 2018 Update)





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

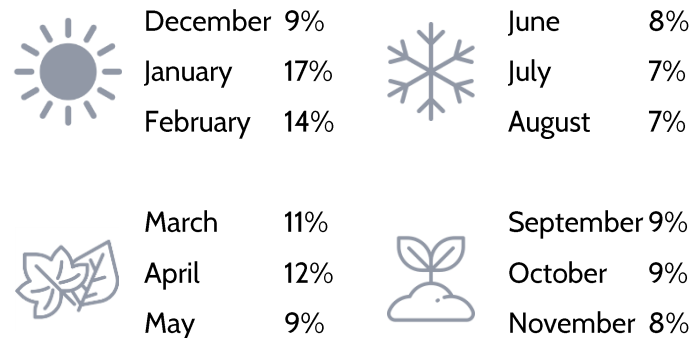
Region Visited on Last Overnight Trip (Top Ten):

1. Auckland (23%)
2. Wellington (15%)
3. Northland (12%)
4. Rotorua (12%)
5. Hamilton/Waikato (11%)
6. Taupo (12%)
7. Christchurch (11%)
8. Bay of Plenty (10%)
9. Coromandel Peninsula (8%)
10. Canterbury (8%)

4.3 Nights

New Zealanders who travelled domestically for leisure purposes within the past 12 months stayed an average of **4.3 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 Q4 2018 Respondents):

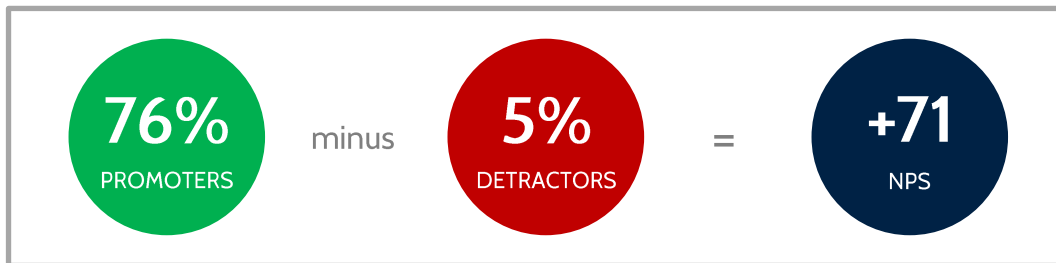
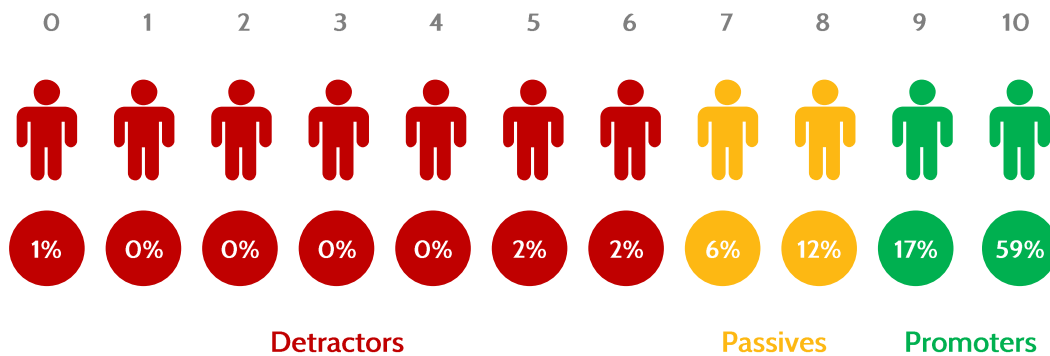
Worse	Better	Much Better
<p>Personal reasons were prevalent while accommodation, prices and traffic were also cited</p> <p>“Not enough awareness about activities”</p> <p>“The hotel that we stayed wasn’t up to standard”</p> <p>“The price of the hotel was over the top for what you got”</p> <p>“Prices way too high for kiwis. motel was very bad”</p> <p>“Accommodation wasn't so flash”</p> <p>“Company, price of accommodation, lack of nearby activities/shops/restaurants”</p> <p>“Was hoping to find something new, but things were just the same as always”</p> <p>“Christchurch was hard to navigate around”</p>	<p>“Comfortable, easy to get around, not too expensive”</p> <p>“I’m a huge fan of ecotourism and outdoor activities. The activities available for these in NZ are unparalleled.”</p> <p>“Idyllic, peaceful, and weather perfect in Akaroa”</p> <p>“Excellent accommodation beautiful places to visited and safe roads”</p> <p>“We found so many more activities to enjoy than we had expected”</p> <p>“Scenery, the beaches, the people, the weather”</p> <p>“Whangarei has come a long way in the 35 years since we were last there”</p> <p>“I really enjoyed the Rail Trail despite not being a big cyclist”</p> <p>“The accommodation was well above my expectations”</p> <p>“No tourists, lots of NZers & easy to get around perfect weather”</p> <p>“Taranaki has plenty to do and see as well as having some great restaurants”</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?



Full Year 2018 Update

More than two thirds of New Zealanders have travelled domestically for leisure purposes within the past 12 months, with the summer period recording the greatest proportion of last overnight trips (40%).

Just under one in two people (47%) who travelled domestically in the past 12 months for leisure purposes had their expectations exceeded, with only 3% having an experience worse than their expectations.

Those that had their expectations exceeded, cited a wide range of reasons as to why their experience was better than expected with weather being a common theme. For those who had an experience worse than expected, accommodation and price were most commonly mentioned.

Overall, domestic visitor satisfaction for the year ending 2018 was 8.7 out of 10, with a very high NPS score of +71 recorded. This indicates New Zealand is currently performing well as a destination for domestic travellers.

Comparing data individually from each quarter (Q1 to Q4 2018), the findings have 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 January and 31 December 2018. Q1 2019's update will be available in April.

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

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