



VISITOR INSIGHTS PROGRAMME

# MARKET PERCEPTIONS: NORTHLAND

JULY – DECEMBER 2024

# BACKGROUND & RESEARCH APPROACH

## MARKET PERCEPTIONS: NORTHLAND

### Background

Angus & Associates is an independent marketing, research and strategic planning consultancy specialising in tourism and leisure. The Market Perceptions programme, a component of our Visitor Insights Programme (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. Market Perceptions offers subscribers a cost effective approach to profiling current and potential visitors to their region and to monitoring and benchmarking brand perceptions, through a syndicated survey of the domestic and Australian travel markets.

### Research Approach

The Market Perceptions survey is conducted online, including on mobile devices, with a sample of at least 7,200 New Zealand and Australian travellers each year. This includes 300 New Zealanders and 300 Australians per month, recruited via Dynata's consumer panel. Participants must be 18+ years old and have travelled overnight in the past 12 months. Quotas based on census data (region, gender, and age) ensure a representative sample for accurate trend monitoring. Northland joined the programme in July 2024. This report presents data from July to December 2024.

The 'NZ Regional Benchmark' referenced in this report is the average across 16 destinations – Coromandel, Hawke's Bay, Taupo, Waitaki, Bay of Plenty, Waikato, Ruapehu, Gisborne, Dunedin, Auckland, Marlborough, Northland, Wellington, Central Otago, Queenstown, Rotorua.

For more information about this research please contact:

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A woman wearing a light-colored hat and a light-colored top is seen from behind, standing on a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a dark blue tint. On the left side, there is a large white circle containing the word "INSIGHTS".

**INSIGHTS**

# NORTHLAND INSIGHTS: JULY – DECEMBER 2024

## DOMESTIC TRAVEL MARKET



- Two out of three (69%) New Zealanders have travelled around New Zealand in the past 12 months, with 16% of domestic travellers visiting Northland.
- The majority of Northland's visitors come from the North Island, with Auckland being the primary domestic market.
- Northland attracts a broad range of domestic visitors, with no significant demographic skews compared to the wider domestic travel market.
- Two-thirds (64%) of New Zealand travellers have visited Northland at least once.
- When thinking of Northland, beautiful beaches and a warm climate are top-of-mind for the domestic market.
- When thinking of specific locations, the Bay of Islands (58%) and Whangārei (26%) are the most common associations, followed by Cape Reinga and Ninety Mile Beach.
- Northland's weather and natural scenery are seen to be its main draws for domestic travellers, with the warmer climate offering a distinct competitive advantage over other New Zealand destinations.
- Northland is associated with a wide range of activities, including walking/hiking, history and heritage, nature and wildlife experiences, Māori and Pacific culture, as well as fishing and hunting. Recent visitors are more likely to associate Northland with family-friendly and water-based activities compared to those who haven't visited the region recently.
- Northland's current Net Promoter Score (NPS) is -4, slightly above the regional benchmark of -8. For recent domestic visitors, however, the NPS increases to +28, well above the regional benchmark of +12, reflecting a positive visitor experience.
- This positive experience is further evident in the 71% of recent domestic visitors who intend to return within the next 12 months.
- The primary barrier to visiting Northland is the perceived inconvenience of travel.
- Northland is converting awareness into a propensity to visit at a rate comparable to the regional benchmark for the domestic travel market.



# NORTHLAND INSIGHTS: JULY – DECEMBER 2024

## AUSTRALIAN TRAVEL MARKET



- One in four (24%) Australians who travelled to New Zealand in the past 12 months visited Northland on their trip.
- While Northland attracts a broad range of Australian visitors, there is a notable skew towards those aged 30-39 and families with children.
- 28% of Australian travellers have visited Northland at least once.
- With one in three Australian travellers aware of Northland but unsure of what to do there, there is an opportunity to educate this market.
- When thinking of Northland, beaches and beautiful scenery are top-of-mind for Australian travellers.
- The Bay of Islands is the most prominent destination associated with Northland among Australian travellers.
- With limited knowledge of the region, Australian travellers struggle to identify what makes Northland stand out from other New Zealand destinations.
- While walking/hiking, nature and wildlife experiences, and scenic sightseeing are the top activities linked with the region, more than one in four Australian travellers do not associate any specific activity or experience with Northland. The region does have a strong association with fishing and hunting experiences compared to other destinations.
- Northland's current Net Promoter Score (NPS) is +18, slightly below the regional benchmark of +21. For recent Australian visitors, the NPS increases to +36, still just below the regional benchmark of +44.
- Two out of three (67%) Australian travellers planning to visit New Zealand in the next 12 months intend to visit Northland.
- The profile of prospective Australian visitors to Northland skews younger (20-39 years).
- The primary barrier for Australian visitors is having already visited Northland, suggesting repeat visitation may be a challenge for this market.
- Northland is converting awareness into a propensity to visit at a rate comparable to the regional benchmark for the Australian market.

A woman wearing a light-colored hat and a white top is seen from behind, standing on a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a dark blue tint. A large white circle is positioned on the left side of the image.

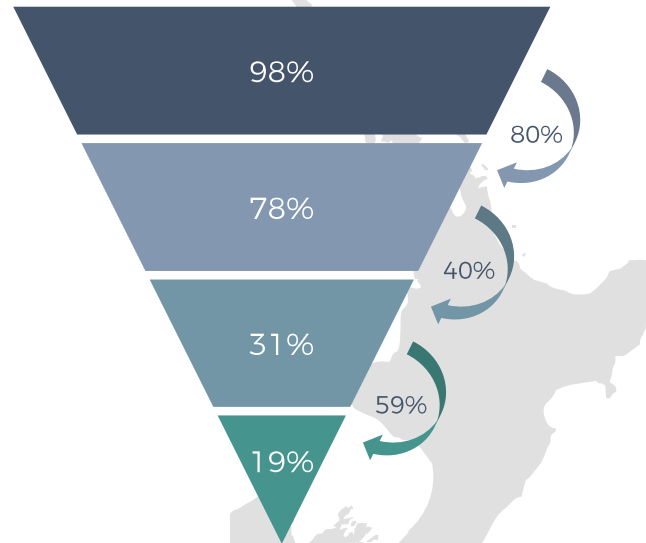
**SNAPSHOT**

# NORTHLAND SNAPSHOT: JULY – DECEMBER 2024

## DOMESTIC TRAVEL MARKET



### NORTHLAND



<b>AWARENESS</b>	Have heard of Northland
<b>FAMILIARITY</b>	Have either visited Northland <u>or</u> have some ideas about what there is to do there
<b>APPEAL</b>	Rate Northland as a highly appealing destination
<b>PROPENSITY TO VISIT</b>	Intend to visit Northland within next 12 months (probably / definitely will visit)



Domestic travellers associate Northland with...

- Walking & Hiking (41%)
- History & Heritage (39%)
- Nature, Wildlife & Eco-Tourism (38%)
- Māori/Pacific Culture (37%)
- Fishing & Hunting (36%)



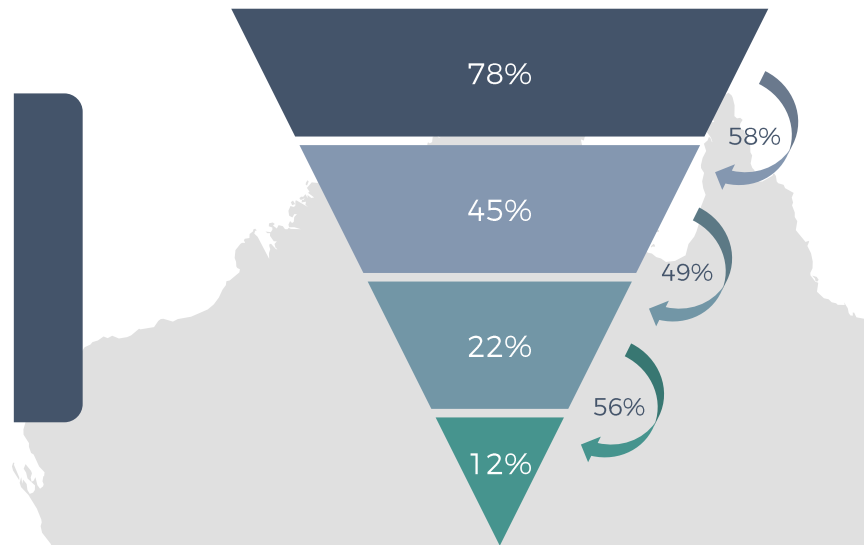


# NORTHLAND SNAPSHOT: JULY – DECEMBER 2024

## AUSTRALIAN TRAVEL MARKET



### NORTHLAND



<b>AWARENESS</b>	Have heard of Northland
<b>FAMILIARITY</b>	Have either visited Northland <u>or</u> have some ideas about what there is to do there
<b>APPEAL</b>	Rate Northland as a highly appealing destination
<b>PROPENSITY TO VISIT</b>	Intend to visit Northland within next 12 months (probably / definitely will visit)



Australian travellers associate Northland with...

- Walking & Hiking (29%)
- Nature, Wildlife & Eco-Tourism (27%)
- Scenic Sightseeing (25%)
- Māori/Pacific Culture (24%)
- History & Culture (22%)



A woman wearing a light-colored hat and a light-colored top is seen from behind, walking across a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a dark blue tint. A large white circle is positioned on the left side of the image, containing the text.

**DOMESTIC  
TRAVEL MARKET**

# TOURISM MARKET SHARE

In the past 12 months, where (if anywhere) have you travelled?



# RECENT VISITOR PROFILE



In the past 12 months, where (if anywhere) have you travelled?

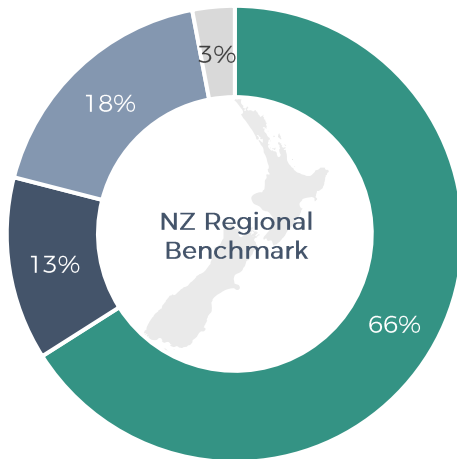
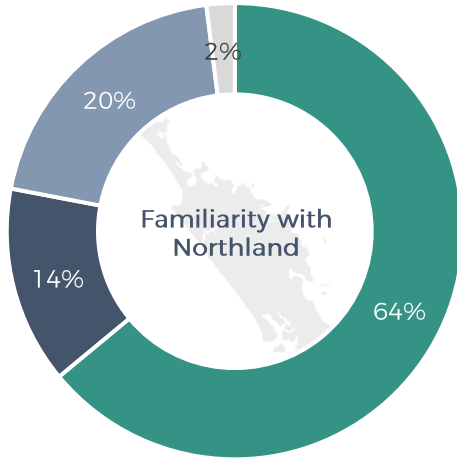
	Total Sample	Recent Visitors
<b>Region of Residence</b>		
Auckland	35%	60% ▲
Waikato	10%	9%
Bay of Plenty	7%	8%
Tairāwhiti / Gisborne	-	1%
Hawke's Bay	4%	1% ▼
Taranaki	3%	2%
Manawatū-Whanganui	5%	3%
Wellington (& Wairarapa)	11%	8%
Tasman	1%	-
Nelson	1%	1%
Marlborough	1%	-
West Coast	-	-
Canterbury	14%	3% ▼
Otago	5%	1% ▼
Southland	2%	2%
North Island (NET)	76%	93% ▲
South Island (NET)	24%	7% ▼

	Total Sample	Recent Visitors
<b>Age</b>		
18-19 years	4%	4%
20-29 years	18%	19%
30-39 years	17%	21%
40-49 years	17%	16%
50-59 years	17%	16%
60-69 years	14%	12%
70+ years	13%	13%
<b>Household Composition</b>		
My husband, wife or partner	59%	63%
My mother and/or father	6%	5%
My children aged under 5	11%	11%
My children aged 5 to 14	17%	18%
My children aged 15 or older	14%	17%
Other family/relatives	10%	9%
Other person(s)	8%	7%
None of the above - I live alone	15%	14%

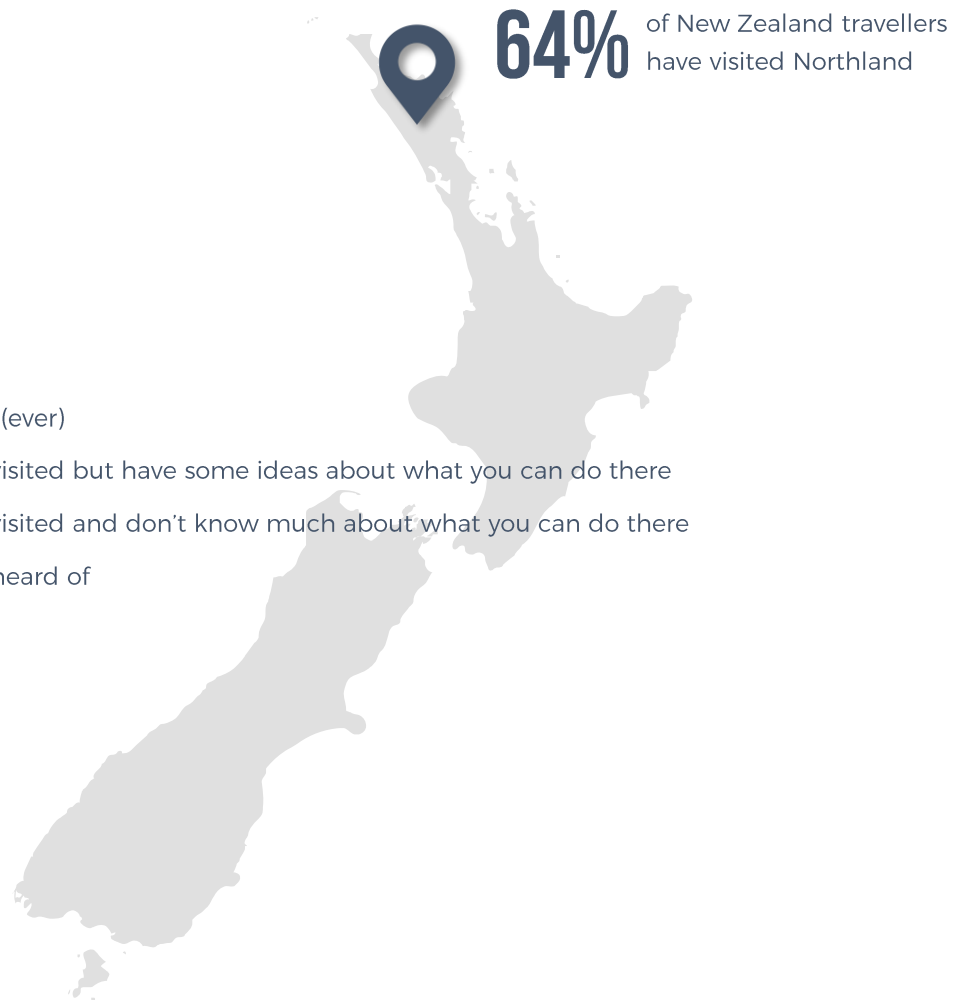
▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# FAMILIARITY

How familiar are you with Northland as a destination to visit for a short break or holiday?



- Have visited (ever)
- Have never visited but have some ideas about what you can do there
- Have never visited and don't know much about what you can do there
- Have never heard of







# PLACE ASSOCIATIONS

What place/s first come to mind when you think about Northland? [OPEN ENDED]



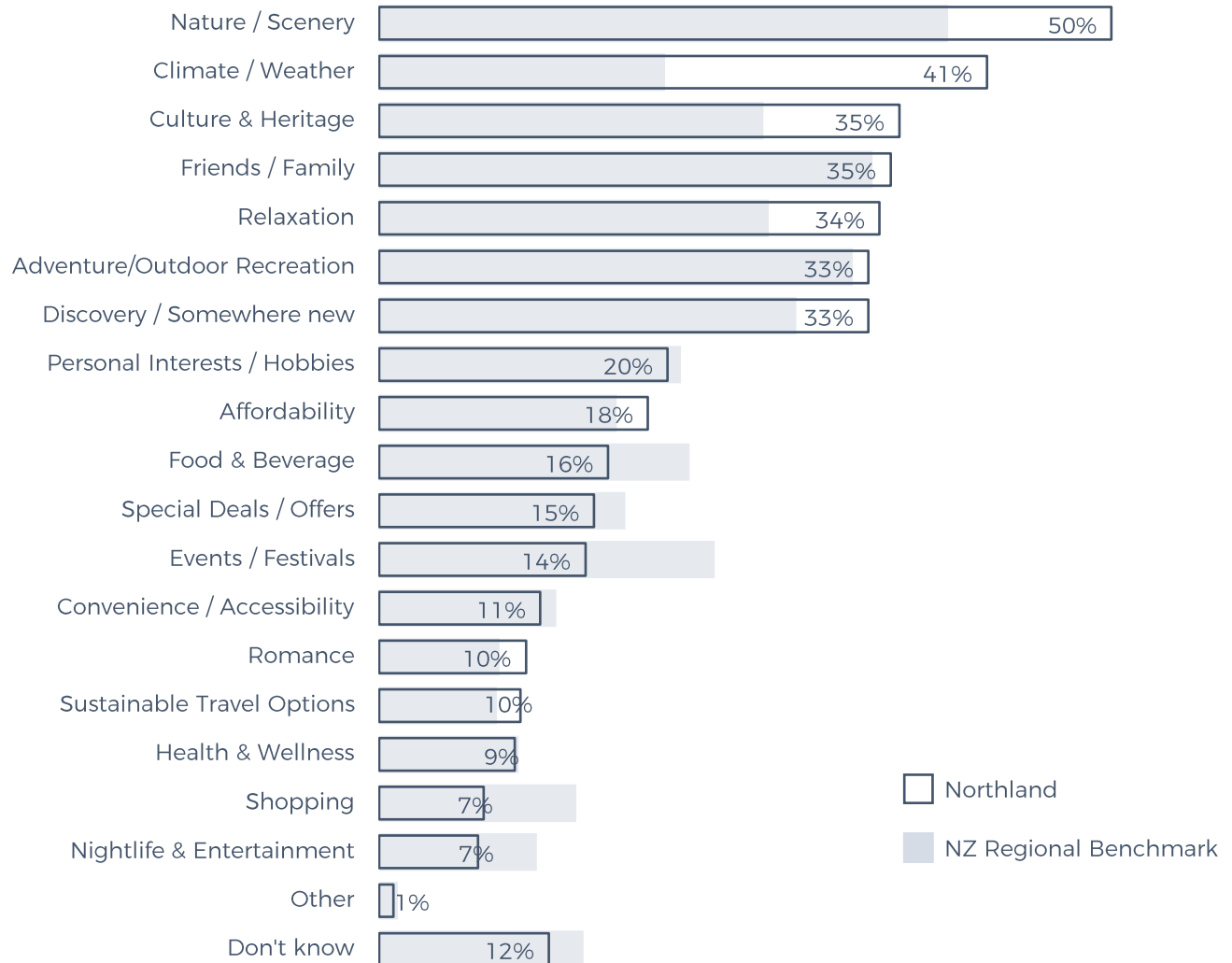
Bay of Islands (NET)	58%
Bay of Islands	14%
Kerikeri	13%
Paihia	11%
Russell	10%
Waitangi / Waitangi Treaty Grounds	7%
Kaikohe	1%
Top of the North (NET)	37%
Cape Reinga	17%
Ninety Mile Beach	11%
Kaitaia	7%
Whangārei & Surrounds (NET)	31%
Whangārei	26%
Mangawhai	2%
Tutukākā / Poor Knights Islands	1%
Waipu	1%
Ruakākā	1%
Kauri Coast & Hokianga (NET)	6%
Dargaville	2%
Waipoua Forest / Tane Mahuta	1%
Opononi	1%
Hokianga	1%

10% of places mentioned were incorrectly attributed to Northland, with the most frequent misattributions being in Auckland (4%), Bay of Plenty (2%), and the Coromandel (1%).

# DESTINATION DRIVERS



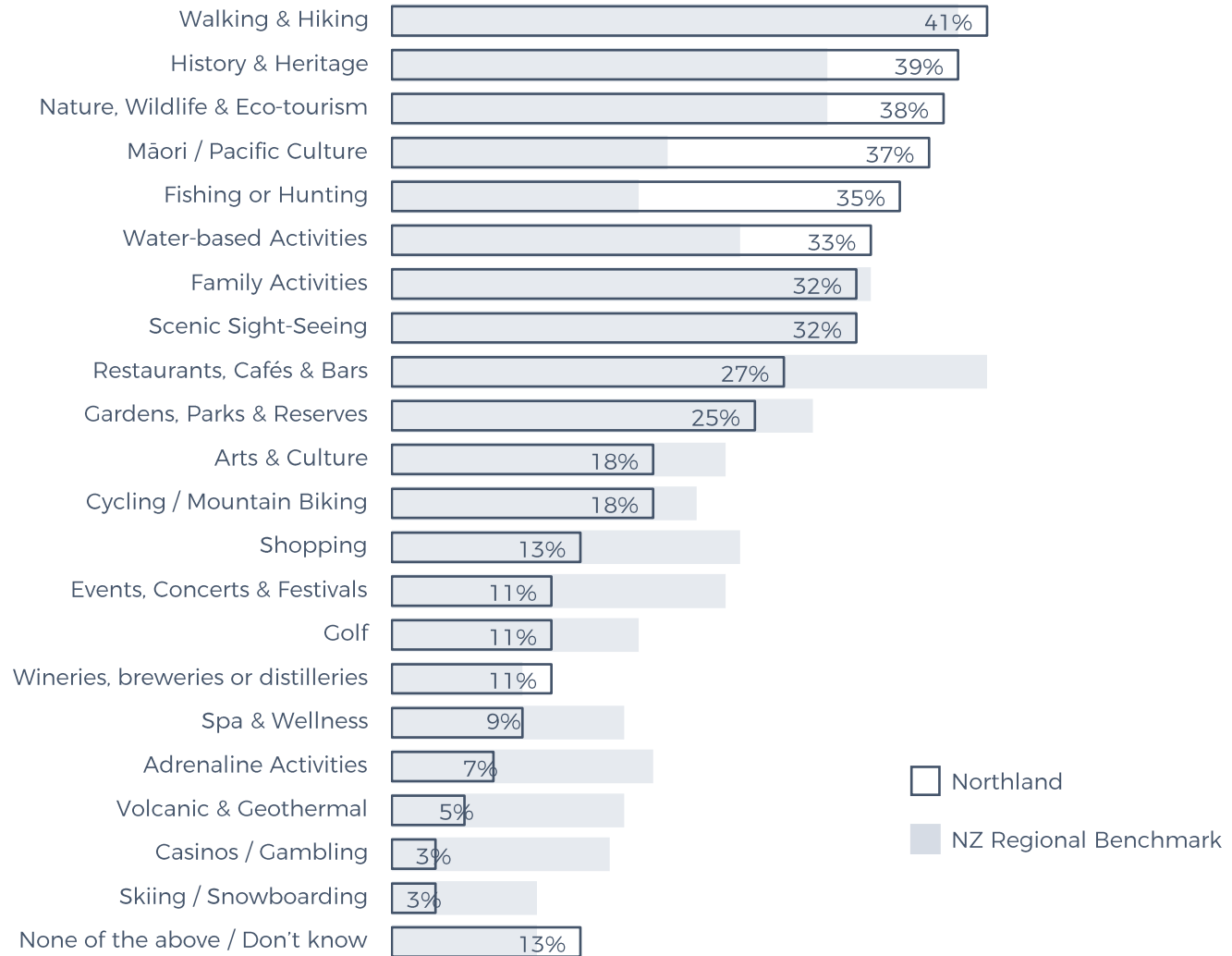
Why might someone choose to visit Northland instead of another New Zealand destination?



# ACTIVITIES / EXPERIENCES



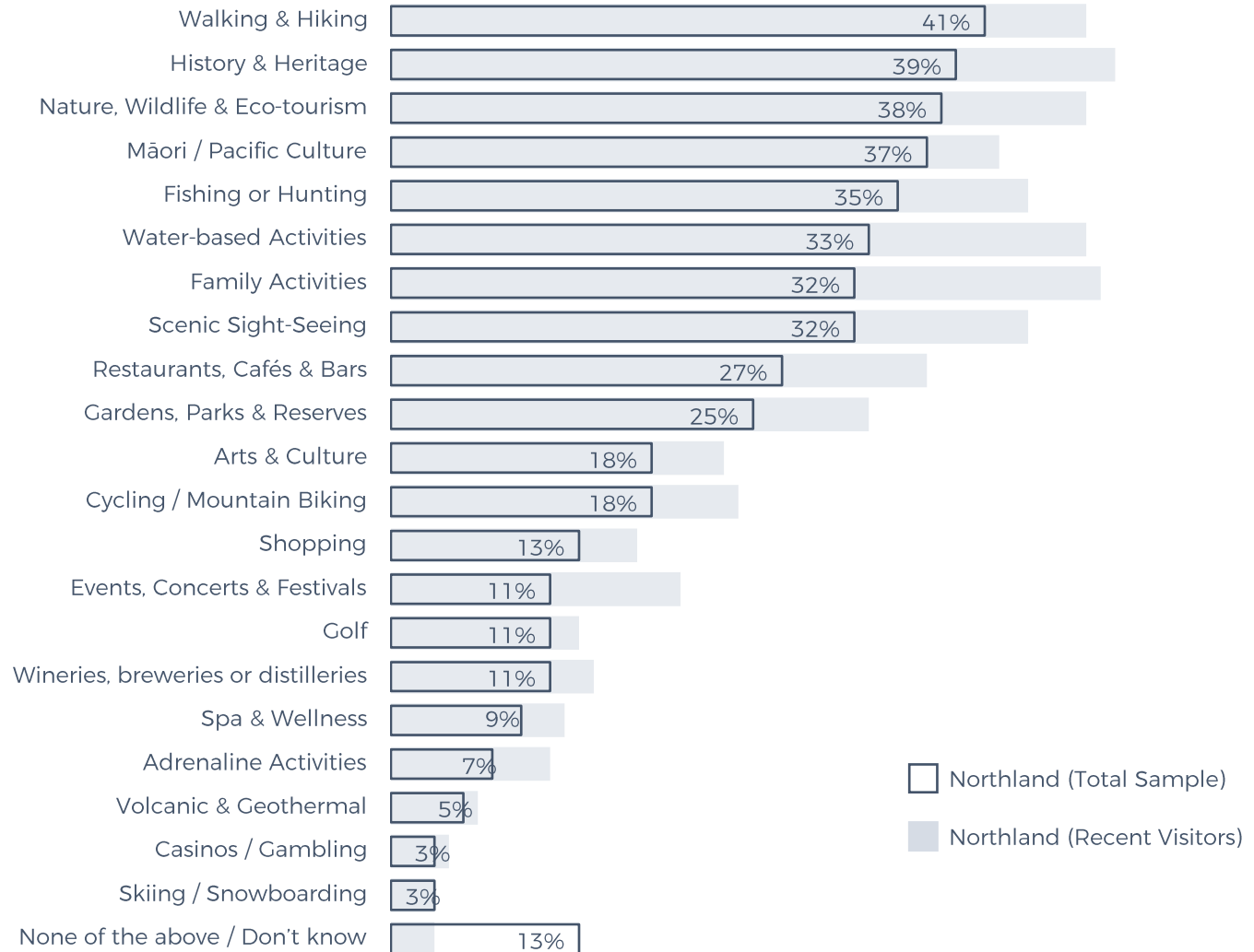
Which, if any, of the following activities or experiences do you associate with Northland?



# ACTIVITIES / EXPERIENCES



Which, if any, of the following activities or experiences do you associate with Northland?

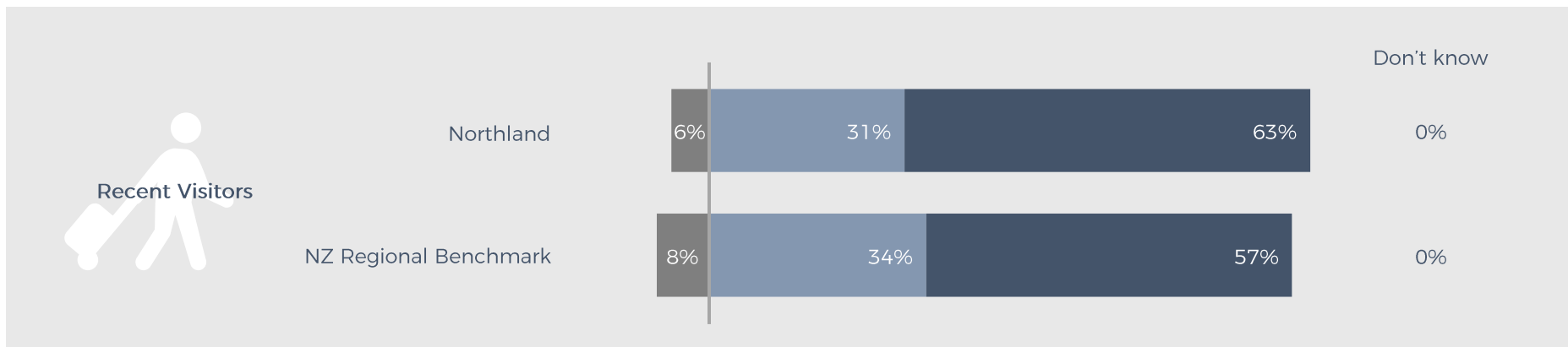
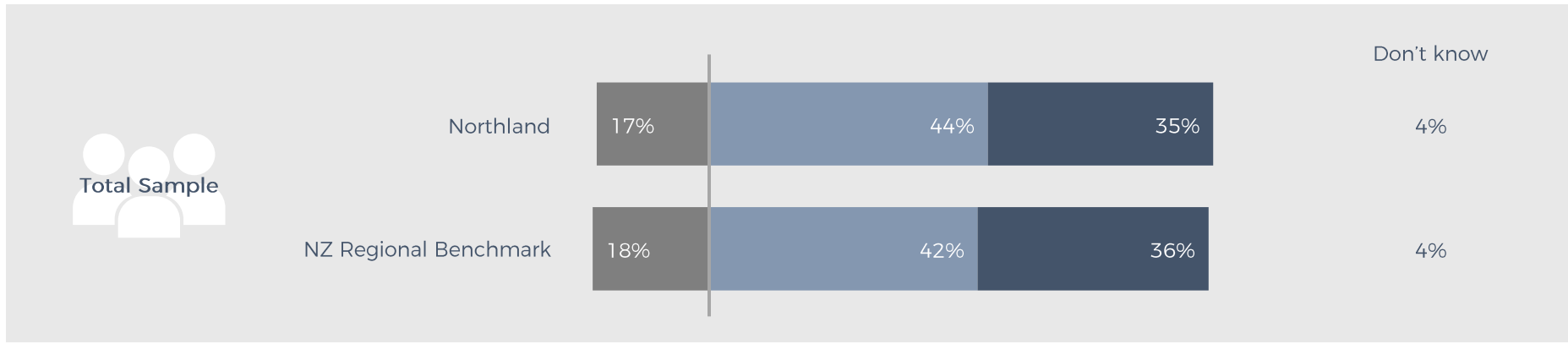


Base: Module Sample - NZ Travellers Heard of Northland, excl. Northland Residents (n=1119)  
Recent Visitors - NZ Travellers Visited Northland in Past 12 Months (n=142)



# DESTINATION APPEAL

How appealing is Northland to you as a destination for a short break or holiday?



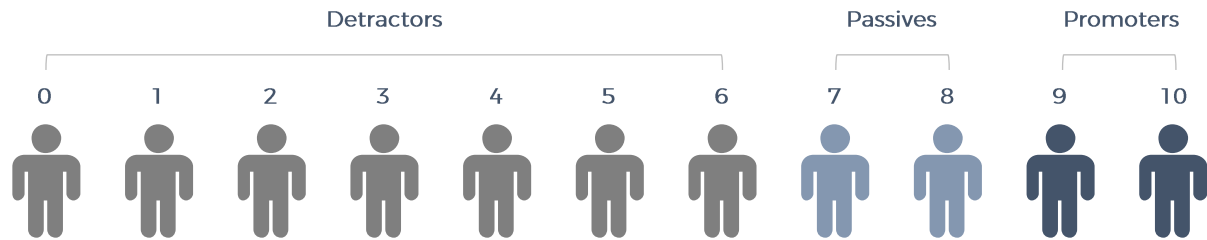
Not very appealing / Not at all appealing
  Somewhat appealing
  Highly appealing

# NET PROMOTOR SCORE (NPS)

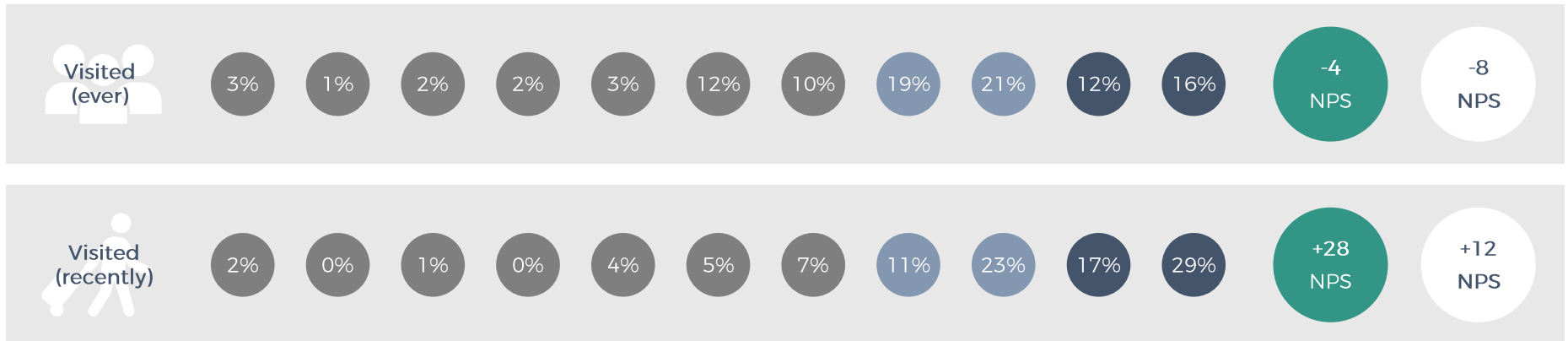


How likely are you to recommend Northland as a travel destination to a friend, family member, or colleague?

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 (or destination). A 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.



NZ Regional Benchmark

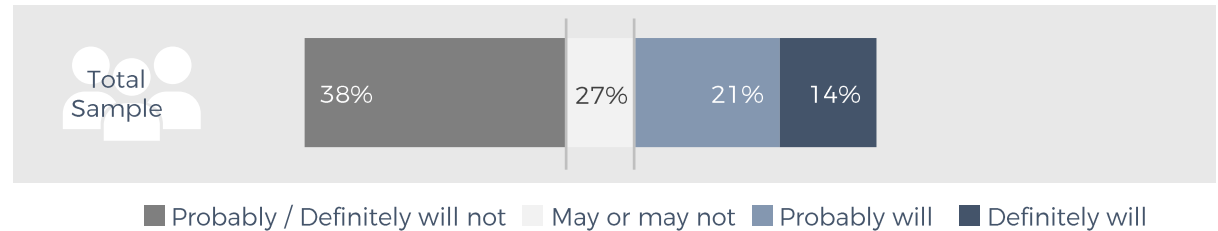


# PROPENSITY TO VISIT

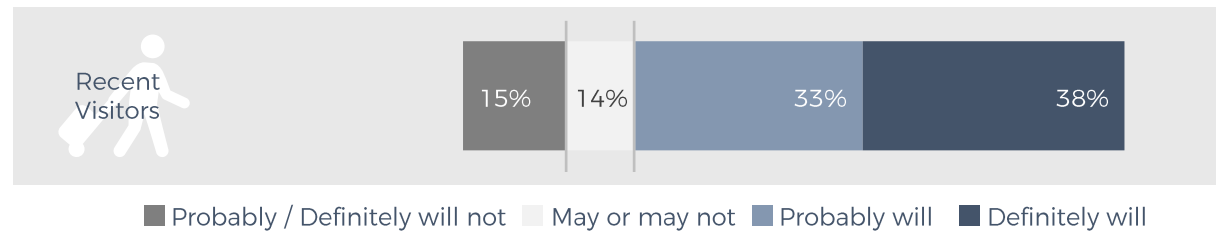
How likely are you to visit Northland, for any reason, within the next 12 months?



**35%** of NZ travellers who intend to travel domestically in the next 12 months intend to visit Northland



**71%** of recent domestic visitors to Northland intend to return within the next 12 months



# PROSPECTIVE VISITOR PROFILE

How likely are you to visit Northland, for any reason, within the next 12 months?



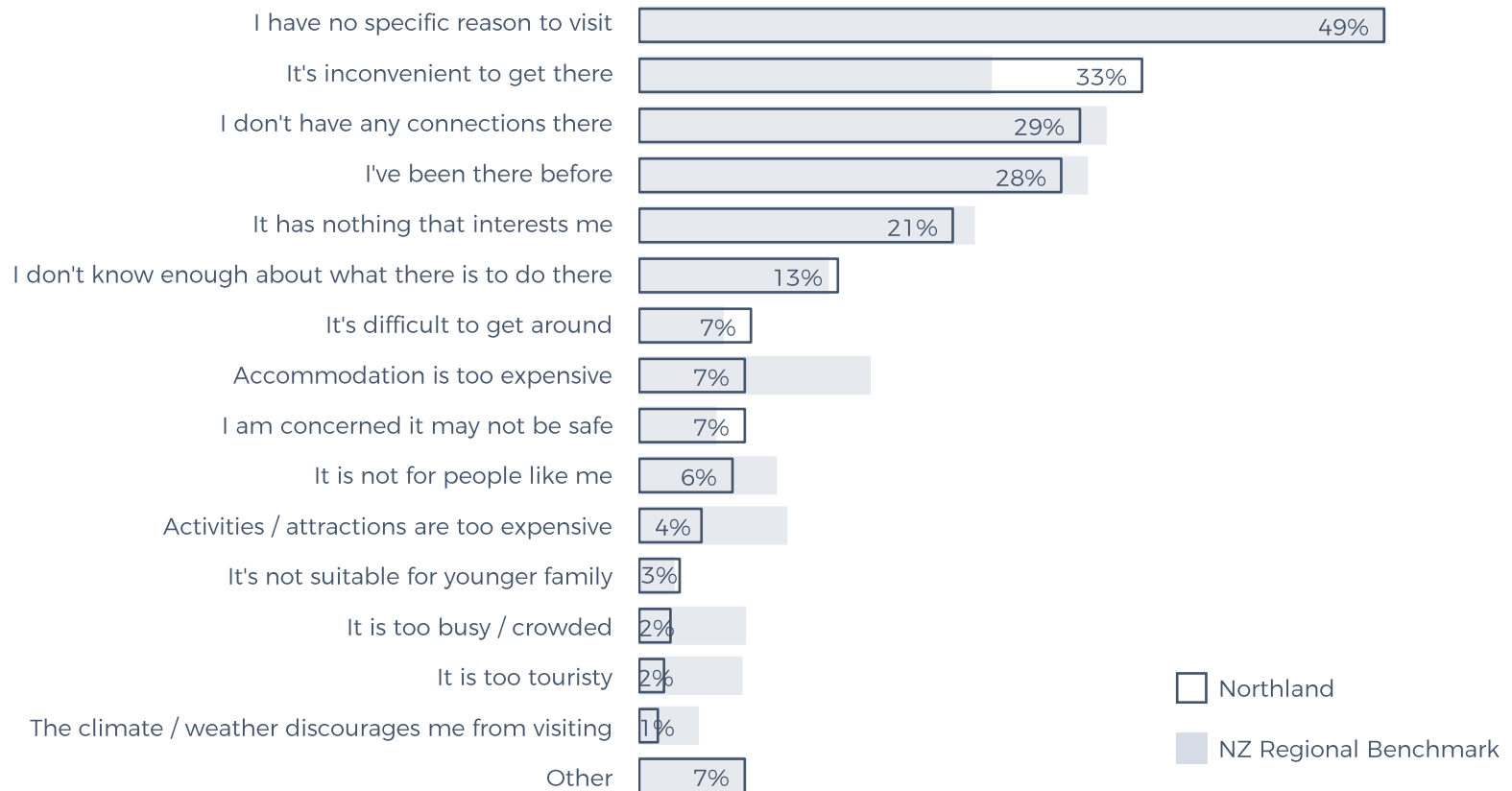
	Total Sample	Prospective Visitors
<b>Region of Residence</b>		
Auckland	35%	56% ▲
Waikato	10%	8%
Bay of Plenty	7%	7%
Tairāwhiti / Gisborne	-	-
Hawke's Bay	4%	3%
Taranaki	3%	2%
Manawatū-Whanganui	5%	2% ▼
Wellington (& Wairarapa)	11%	9%
Tasman	1%	-
Nelson	1%	-
Marlborough	1%	-
West Coast	-	-
Canterbury	14%	6% ▼
Otago	5%	3%
Southland	2%	1%
North Island (NET)	76%	90% ▲
South Island (NET)	24%	10% ▼

	Total Sample	Prospective Visitors
<b>Age</b>		
18-19 years	4%	3%
20-29 years	18%	21%
30-39 years	17%	21%
40-49 years	17%	22%
50-59 years	17%	12%
60-69 years	14%	12%
70+ years	13%	9%
<b>Household Composition</b>		
My husband, wife or partner	59%	63%
My mother and/or father	6%	6%
My children aged under 5	11%	12%
My children aged 5 to 14	17%	25% ▲
My children aged 15 or older	14%	19%
Other family/relatives	10%	11%
Other person(s)	8%	6%
None of the above - I live alone	15%	11%

▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# BARRIERS TO VISITING

You mentioned that you are unlikely to visit Northland within the next 12 months. Why is that?





# CONVERTING AWARENESS TO VISITATION



The funnel metric below illustrates the path to purchase, from awareness to likelihood of future visits. It measures: awareness of Northland, knowledge of the region, appeal as a destination, and the likelihood of visiting. The majority (98%) of New Zealand travellers have heard of Northland. As we move down the funnel, each stage introduces a new measure. The 19% at the bottom represents travellers who:

- Have heard of Northland
- Are familiar with Northland (have either visited or have some ideas about what there is to do there)
- Rate Northland as a highly appealing destination
- Intend to visit Northland within the next 12 months

The smaller numbers on the right indicate conversion between stages.

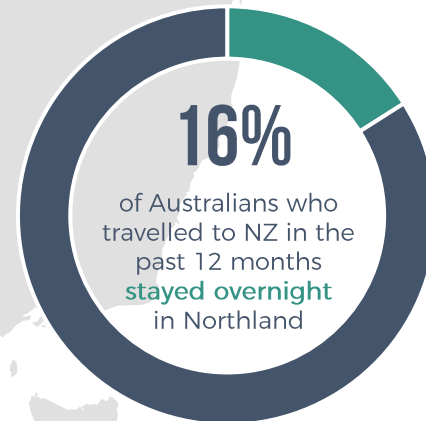
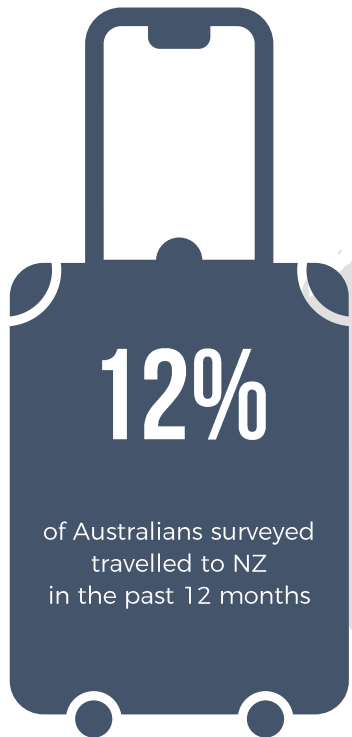


A woman wearing a light-colored hat and a light-colored top is seen from behind, standing on a suspension bridge. The bridge has wooden planks and metal cables. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent dark blue filter.

**AUSTRALIAN  
TRAVEL MARKET**

# TOURISM MARKET SHARE

In the past 12 months, where (if anywhere) have you travelled?



# RECENT VISITOR PROFILE

In the past 12 months, where (if anywhere) have you travelled?



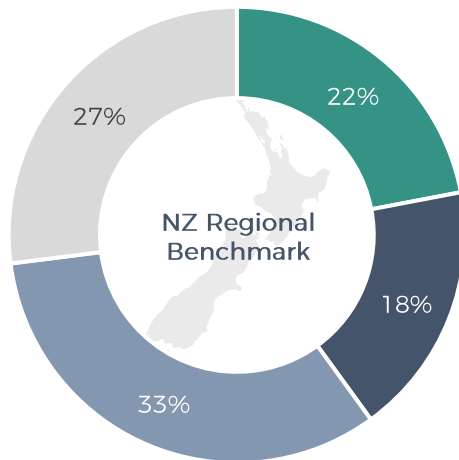
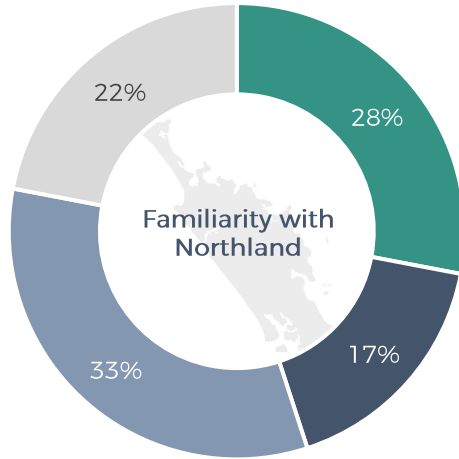
	Total Sample	Recent Visitors
<b>Region of Residence</b>		
Australian Capital Territory	2%	7%
New South Wales	32%	36%
Northern Territory	1%	2%
Queensland	21%	18%
South Australia	7%	2%
Tasmania	2%	-
Victoria	26%	25%
Western Australia	10%	10%

	Total Sample	Recent Visitors
<b>Age</b>		
18-19 years	3%	2%
20-29 years	17%	21%
30-39 years	19%	32% ▲
40-49 years	16%	11%
50-59 years	16%	11%
60-69 years	14%	10%
70+ years	15%	13%
<b>Household Composition</b>		
My husband, wife or partner	60%	69%
My mother and/or father	7%	5%
My children aged under 5	10%	14%
My children aged 5 to 14	19%	30% ▲
My children aged 15 or older	14%	17%
Other family/relatives	7%	6%
Other person(s)	6%	4%
None of the above - I live alone	17%	15%

▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# FAMILIARITY

How familiar are you with Northland as a destination to visit for a short break or holiday?



- Have visited (ever)
- Have never visited but have some ideas about what you can do there
- Have never visited and don't know much about what you can do there
- Have never heard of



**28%** of Australian travellers have visited Northland





# PLACE ASSOCIATIONS

What place/s first come to mind when you think about Northland? [OPEN ENDED]

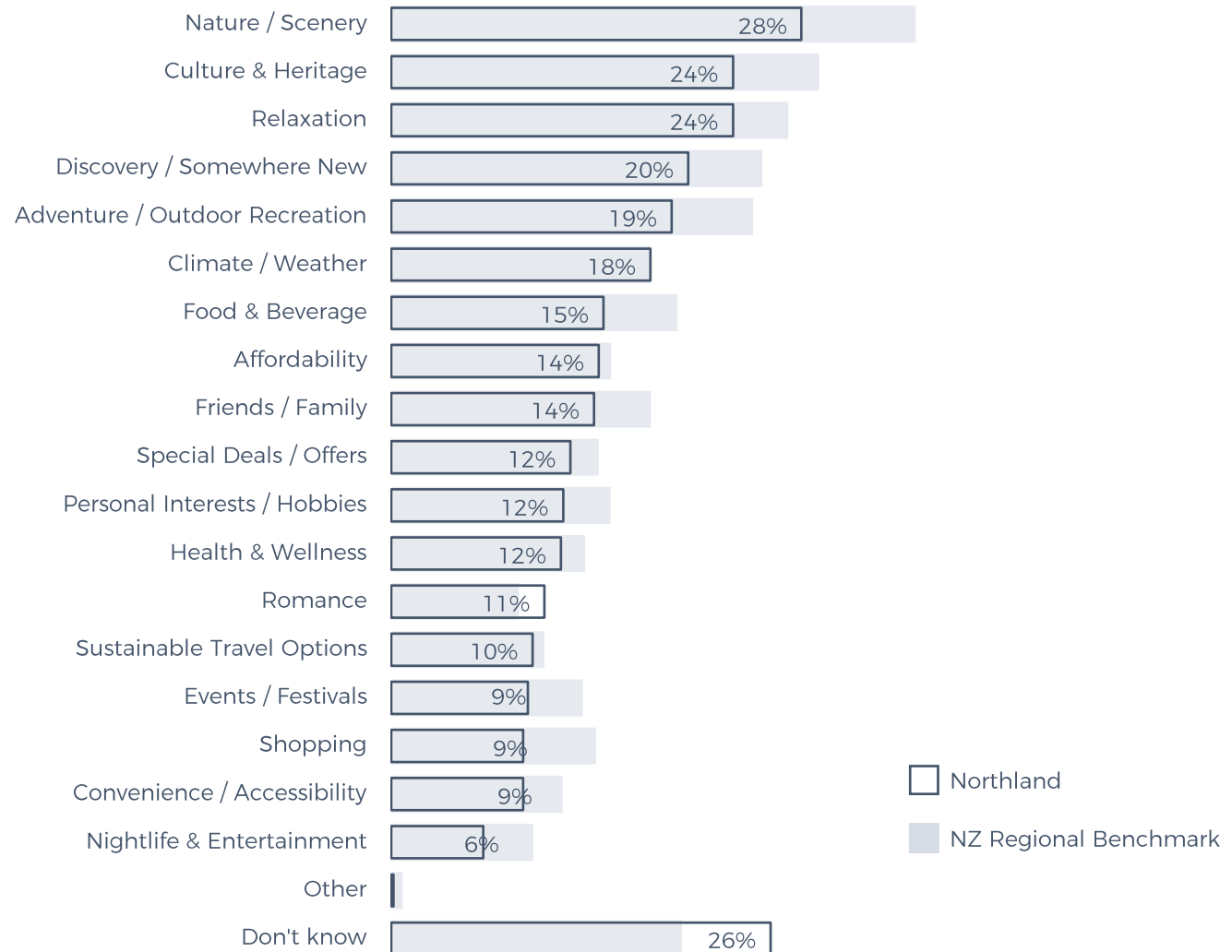


Bay of Islands (NET)	21%
Bay of Islands	12%
Kerikeri	2%
Paihia	2%
Russell	2%
Waitangi / Waitangi Treaty Grounds	3%
Top of the North (NET)	9%
Cape Reinga	5%
Ninety Mile Beach	2%
Whangārei & Surrounds (NET)	5%
Whangārei	4%
Kauri Coast & Hokianga (NET)	0%

9% of places mentioned were incorrectly attributed to Northland, with the most frequent misattributions being in Auckland (3%)

# DESTINATION DRIVERS

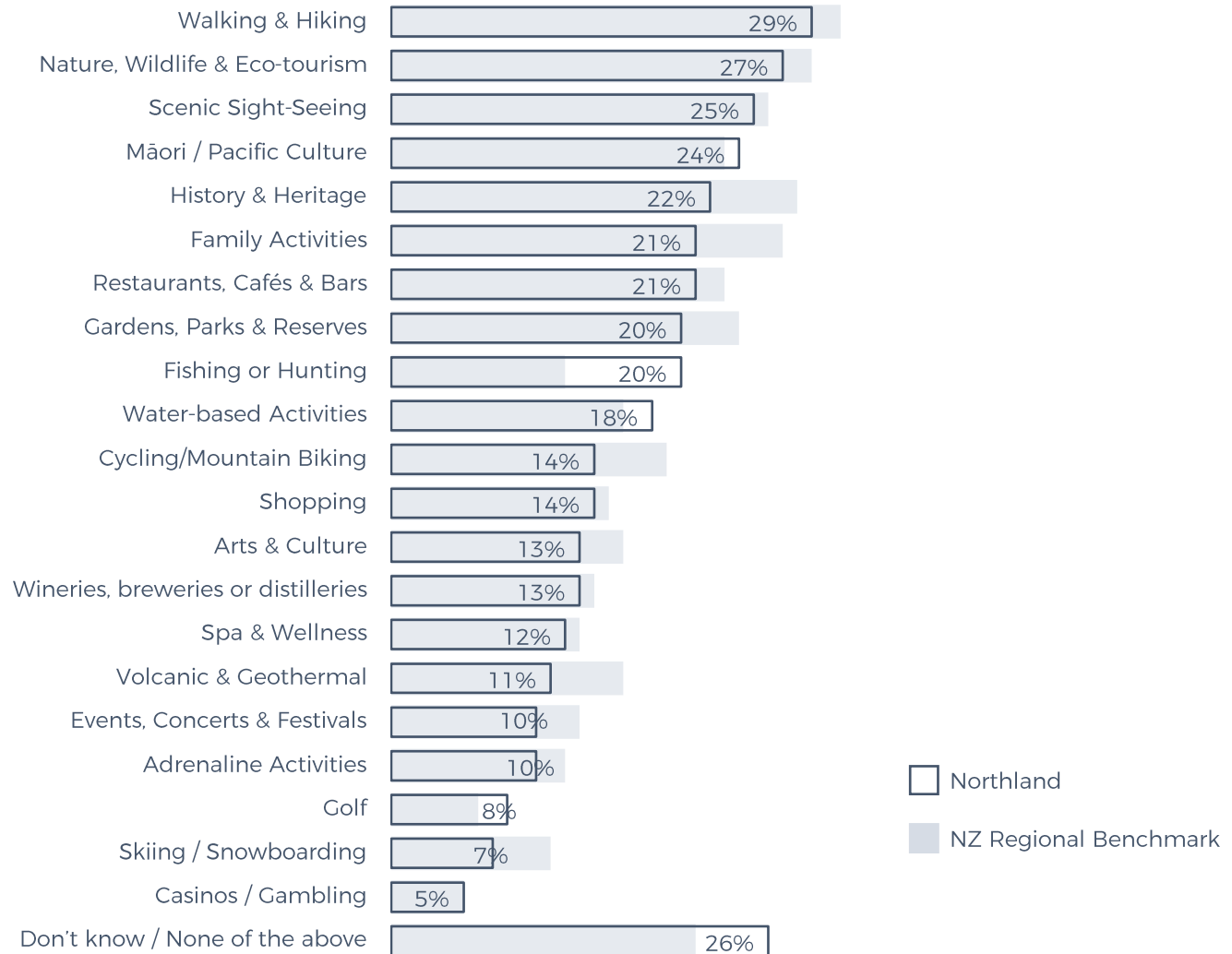
Why might someone choose to visit Northland instead of another New Zealand destination?





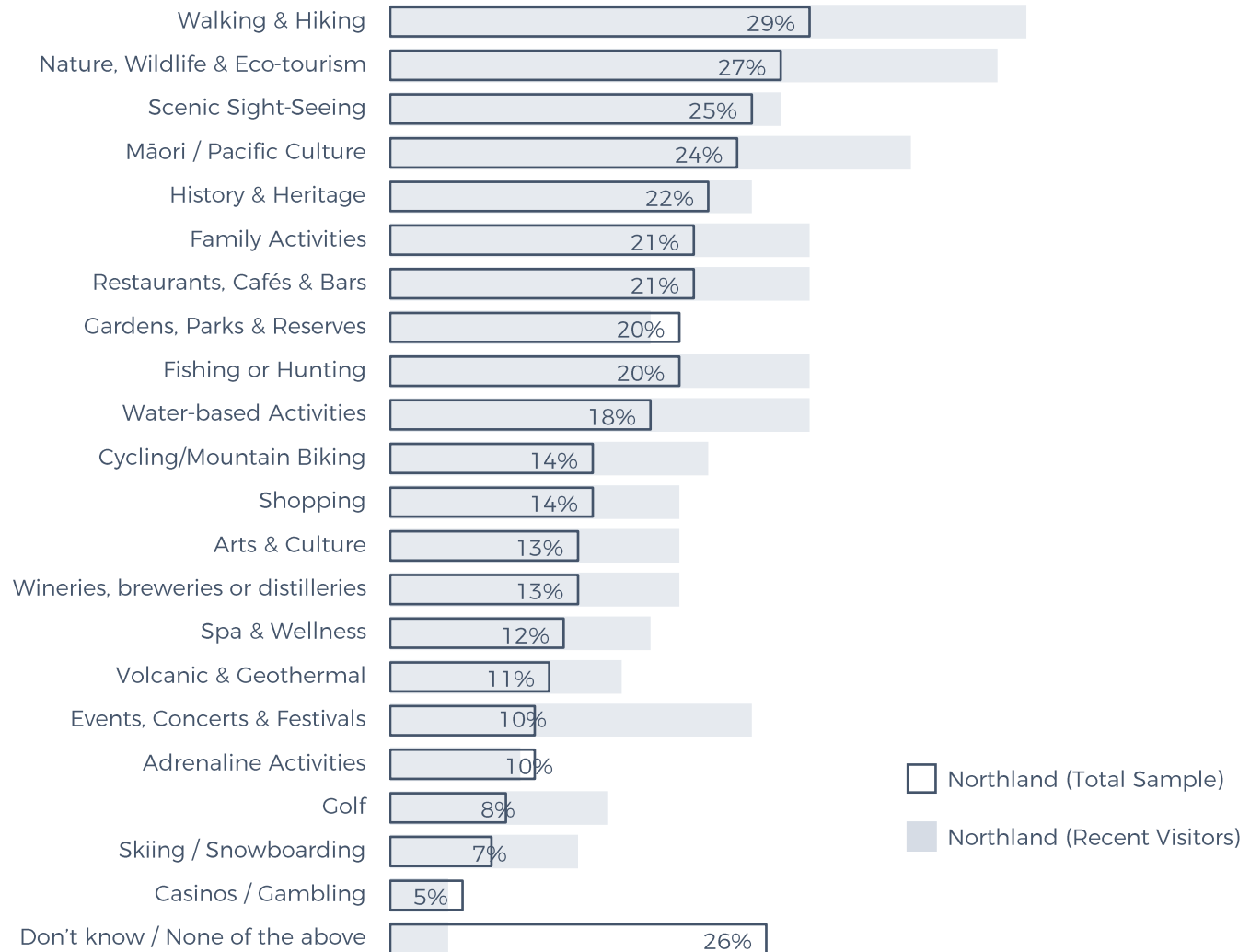
# ACTIVITIES / EXPERIENCES

Which, if any, of the following activities or experiences do you associate with Northland?



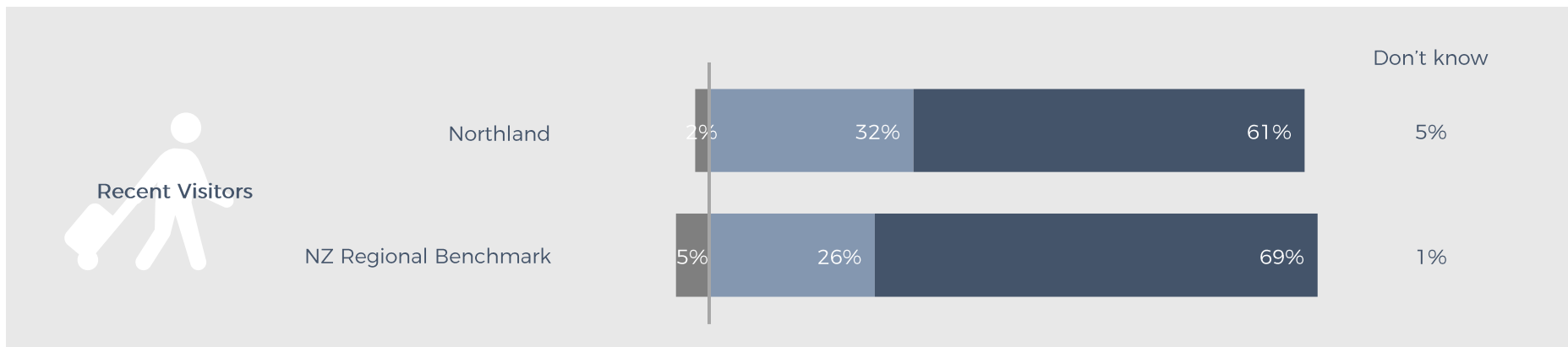
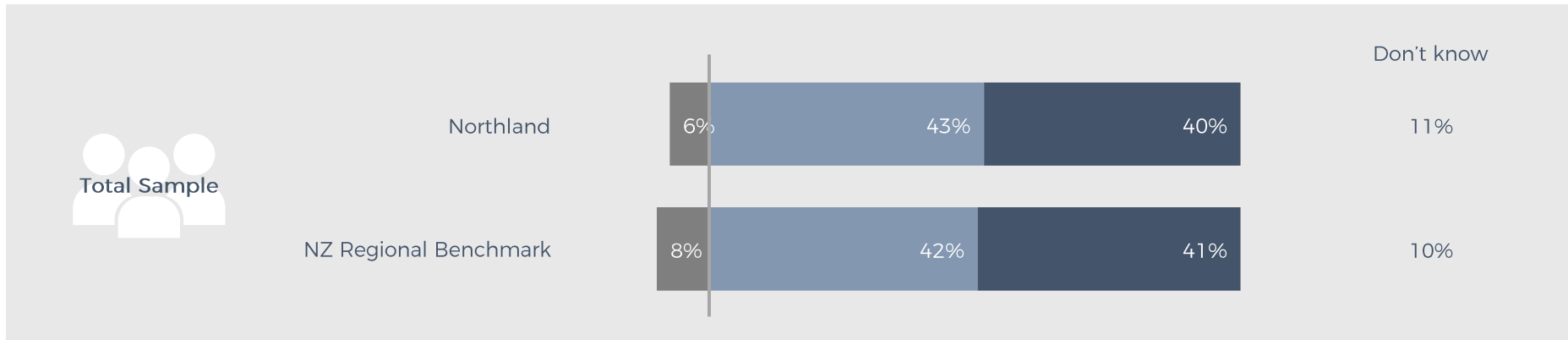
# ACTIVITIES / EXPERIENCES

Which, if any, of the following activities or experiences do you associate with Northland?



# DESTINATION APPEAL

How appealing is Northland to you as a destination for a short break or holiday?



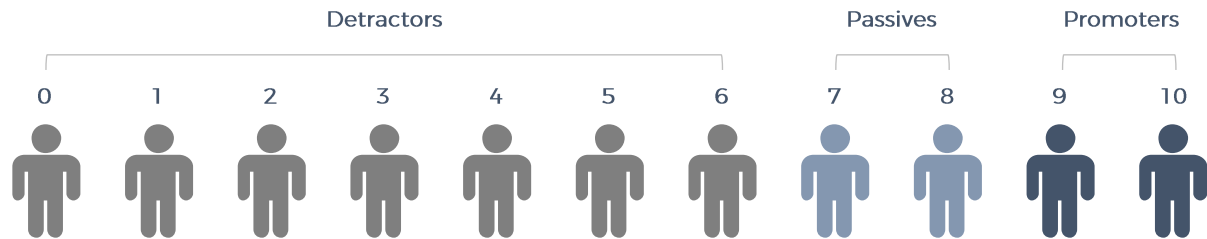
Not very appealing / Not at all appealing
  Somewhat appealing
  Highly appealing

# NET PROMOTOR SCORE (NPS)

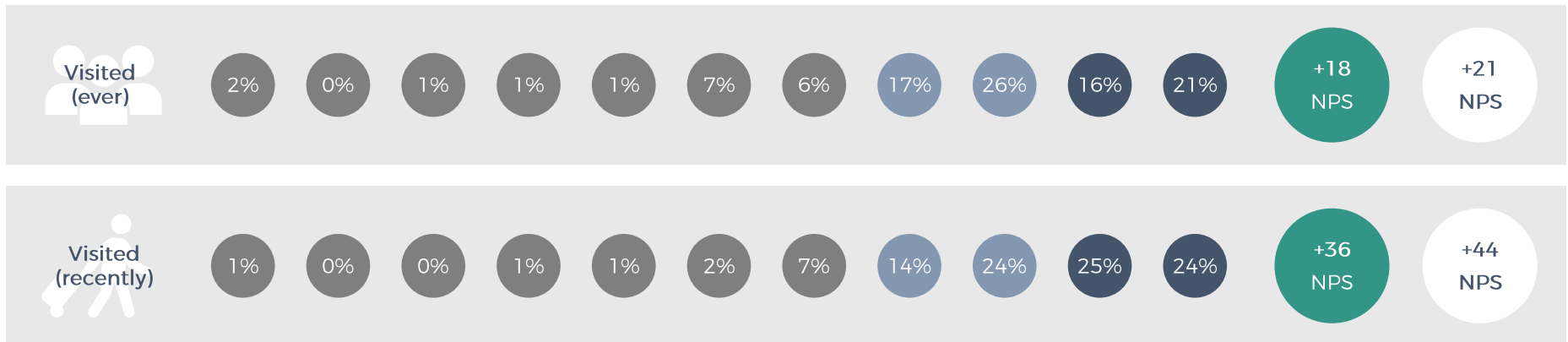
How likely are you to recommend Northland as a travel destination to a friend, family member, or colleague?



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 (or destination). A 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.



NZ Regional Benchmark

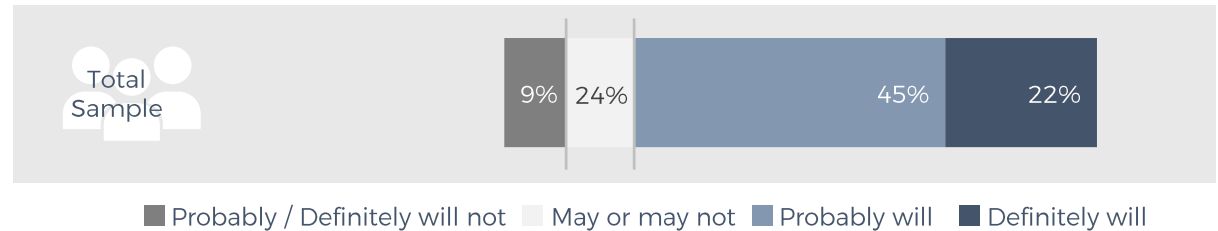


# PROPENSITY TO VISIT

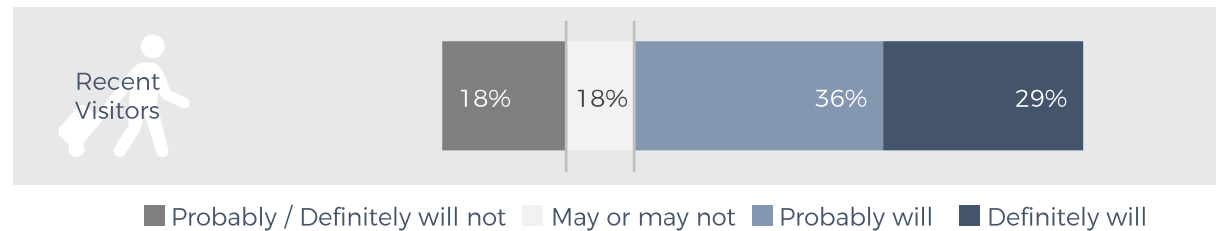
How likely are you to visit Northland, for any reason, within the next 12 months?



**67%** of AU travellers who intend to visit New Zealand in the next 12 months intend to visit Northland



**64%** of recent Australian visitors to Northland intend to return within the next 12 months



# PROSPECTIVE VISITOR PROFILE

How likely are you to visit Northland, for any reason, within the next 12 months?



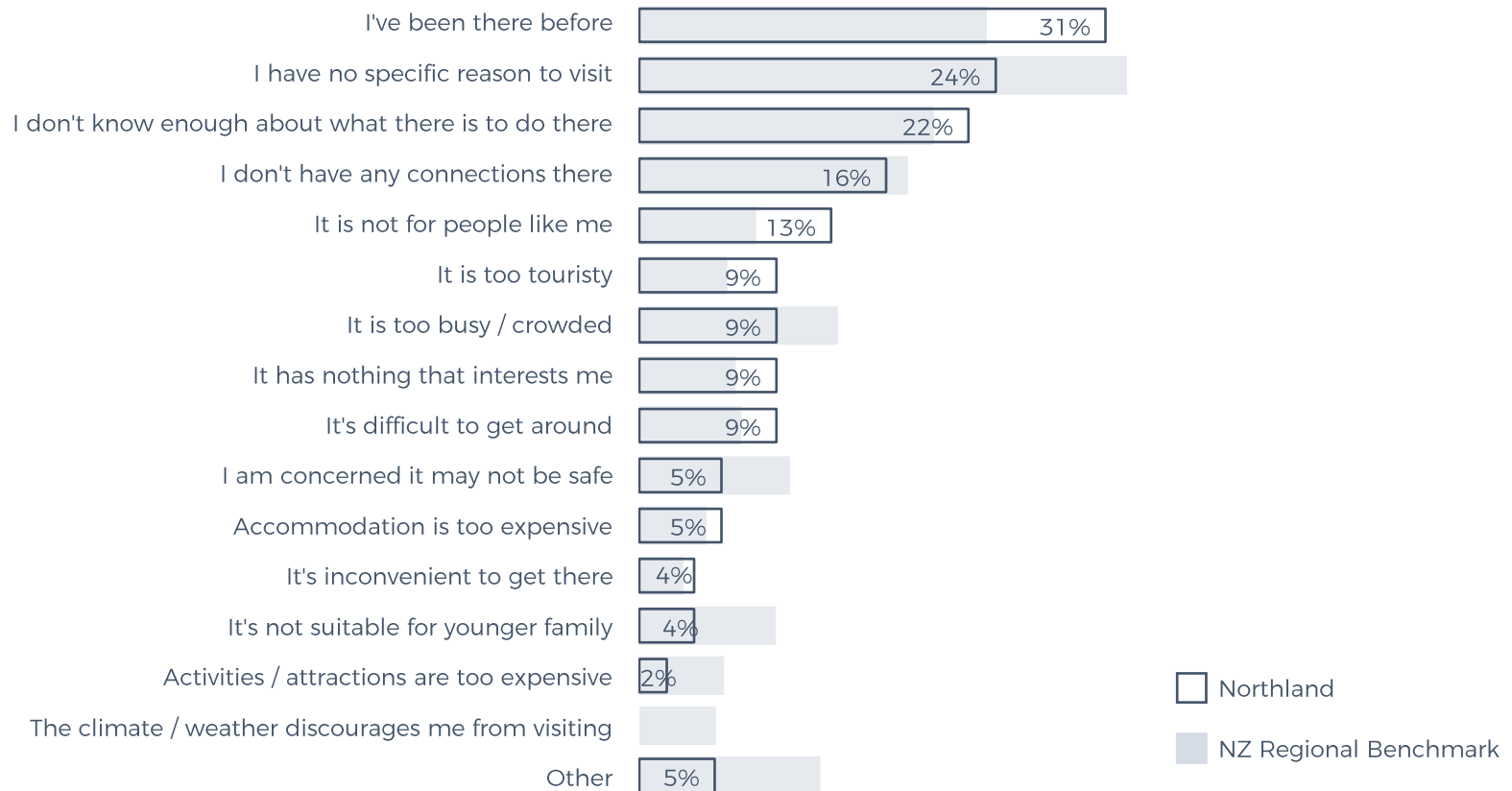
	Total Sample	Prospective Visitors
<b>Region of Residence</b>		
Australian Capital Territory	2%	5%
New South Wales	32%	33%
Northern Territory	1%	1%
Queensland	21%	16%
South Australia	7%	8%
Tasmania	2%	1%
Victoria	26%	27%
Western Australia	10%	9%

	Total Sample	Prospective Visitors
<b>Age</b>		
18-19 years	3%	1%
20-29 years	17%	27% ▲
30-39 years	19%	33% ▲
40-49 years	16%	15%
50-59 years	16%	10% ▼
60-69 years	14%	9%
70+ years	15%	5% ▼
<b>Household Composition</b>		
My husband, wife or partner	60%	61%
My mother and/or father	7%	8%
My children aged under 5	10%	12%
My children aged 5 to 14	19%	31% ▲
My children aged 15 or older	14%	16%
Other family/relatives	7%	9%
Other person(s)	6%	5%
None of the above - I live alone	17%	9% ▼

▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# BARRIERS TO VISITING

You mentioned that you are unlikely to visit Northland within the next 12 months. Why is that?



# CONVERTING AWARENESS TO VISITATION



The funnel metric below illustrates the path to purchase, from awareness to likelihood of future visits. It measures: awareness of Northland, knowledge of the region, appeal as a destination, and the likelihood of visiting. The majority (98%) of New Zealand travellers have heard of Northland. As we move down the funnel, each stage introduces a new measure. The 19% at the bottom represents travellers who:

- Have heard of Northland
- Are familiar with Northland (have either visited or have some ideas about what there is to do there)
- Rate Northland as a highly appealing destination
- Intend to visit Northland within the next 12 months

The smaller numbers on the right indicate conversion between stages.

