

A person wearing a light-colored hat and a white sweater is walking away from the camera on a suspension bridge. The bridge has wooden planks and ropes. The background is a dense forest with many trees and green foliage. The entire image has a blue tint.

VISITOR INSIGHTS PROGRAMME

# MARKET PERCEPTIONS: NORTHLAND

YEAR ENDING JUNE 2025

# 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 research 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, and this report presents results for the first full year of the region's involvement (YE June 2025).

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

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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: YEAR ENDING JUNE 2025

## DOMESTIC TRAVEL MARKET



- Seven in ten (71%) New Zealanders aged 18 years or more travelled within New Zealand in the last 12 months. 15% of these domestic travellers visited Northland and a slightly smaller 13% stayed overnight in the region.
- Auckland is Northland's primary domestic source market, contributing 60% of all visitors in the year to June 2025. Fewer than 10% of Northland's domestic visitors originated from South Island regions. Northland otherwise attracts a broad range of domestic visitors, with no significant demographic skews compared to the wider domestic travel market.
- Almost two-thirds (65%) of recent domestic travellers (people who have travelled within New Zealand in the last 12 months) have visited Northland at least once in their lifetime and a further 14% report a good level of knowledge about the region despite not having visited.
- When thinking of Northland, beautiful beaches, a warm climate, fishing, Māori and Waitangi Treaty Grounds are top-of-mind for the domestic market. When asked to identify **places** within Northland, it is Bay of Islands (50%) and Cape Reinga (17%) that most commonly come to mind.
- Northland's nature and scenery and its climate/weather are seen to be the main drawcards for domestic visitors, along with its culture and heritage attractions, and the presence of family/friends in the region. Northland's warmer climate is a distinct point of difference when the region is considered alongside other domestic destinations.
- Northland is associated with a wide range of activities, the most prominent of which are walking/hiking, nature and wildlife experiences, history and heritage, experiences of Māori and Pacific culture, as well as fishing or hunting, and water-based activities. Relative to other domestic destinations, Northland has a particular strength in its associations with Māori/Pacific culture, and with fishing/hunting.
- Northland's Net Promoter Score (NPS) is -4, which is slightly above the regional benchmark of -8. However, amongst recent visitors, Northland's NPS increases to +28. This is well above the regional benchmark of +11 and is indicative of a very positive visitor experience. This positive experience is further evident in the 72% of recent domestic visitors who intend to return to the region within the next 12 months.
- Excluding the lack of a compelling reason to visit, the primary barrier to visiting Northland is the perceived inconvenience of travel to the region.
- Northland is currently converting awareness into propensity to visit at a rate that is slightly higher than the regional benchmark for the domestic travel market.

# NORTHLAND INSIGHTS: YEAR ENDING JUNE 2025

## AUSTRALIAN TRAVEL MARKET



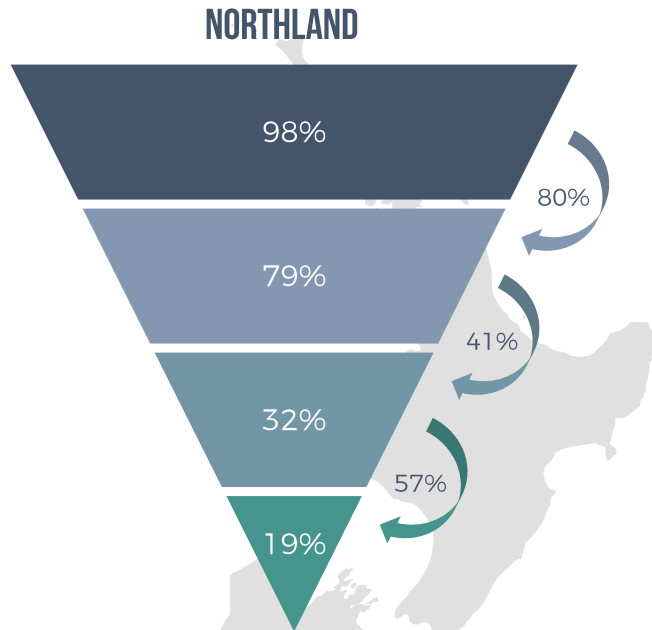
- More than one quarter (28%) of Australians who travelled to New Zealand in the past 12 months visited Northland on their trip. Around one in five (21%) stayed overnight in the region.
- While Northland attracts a broad range of Australian visitors, there are notable skews towards the 30-39 age group and families with younger children (aged up to 14 years).
- 28% of recent Australian travellers to New Zealand had visited Northland at least once in their lifetime, if not on their current trip. However, more than half indicated that they weren't aware of Northland or (if aware) had very little idea of what the region offered for visitors.
- The top-of-mind associations with Northland amongst Australian travellers are beaches and beautiful scenery. Bay of Islands is the **place** most often associated with the region.
- With relatively limited knowledge of Northland, Australian respondents sometimes struggle to identify why visitors would choose Northland over other New Zealand destinations. More than one quarter of the sample (27%) responded 'don't know' when asked about drivers of destination choice.
- While walking/hiking, nature and wildlife experiences, and scenic sightseeing are the activities most often linked with Northland, one in four Australian travellers weren't able to associate any specific activity or experience with the region. Northland does have a strong association with fishing and hunting experiences compared to other New Zealand destinations.
- Northland's current Net Promoter Score (NPS) is +21, slightly below the regional benchmark of +22. For recent Australian visitors to Northland, the NPS increases to +36 but remains below the regional benchmark of +43.
- Two out of three (66%) Australian travellers planning to visit New Zealand in the next 12 months intend to visit Northland. The age profile of this group skews younger (20-39 years) and towards households with children (aged up to 14 years), which is consistent with the current visitor profile.
- Excluding the lack of a specific reason to visit, the primary barrier to visitation is a prior visit (I've been there before). This suggests that creating new and compelling reasons for **repeat** visitation may be a key to growth.
- Northland is currently 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. On the left side, there is a large white circle containing the word 'SNAPSHOT' in a bold, sans-serif font.

**SNAPSHOT**

# NORTHLAND SNAPSHOT: YEAR ENDING JUNE 2025

## DOMESTIC TRAVEL MARKET



- AWARENESS**  
Have heard of Northland
- FAMILIARITY**  
Have either visited Northland or have some ideas about what there is to do there
- APPEAL**  
Rate Northland as a highly appealing destination
- PROPENSITY TO VISIT**  
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 (39%)
- Māori/Pacific Culture (39%)
- Fishing & Hunting (35%)

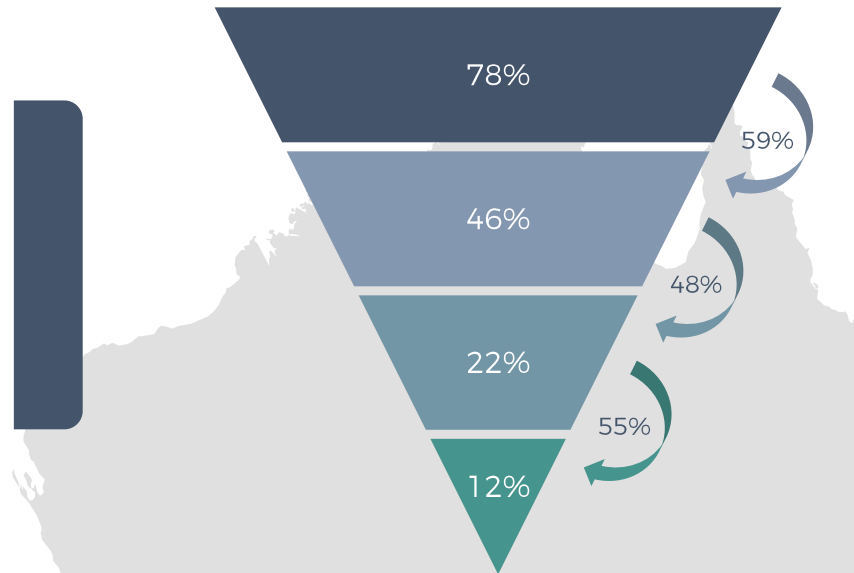


# NORTHLAND SNAPSHOT: YEAR ENDING JUNE 2025

## 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 (30%)
- Nature, Wildlife & Eco-Tourism (28%)
- Scenic Sightseeing (26%)
- Māori/Pacific Culture (24%)
- History & Culture (23%)



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?

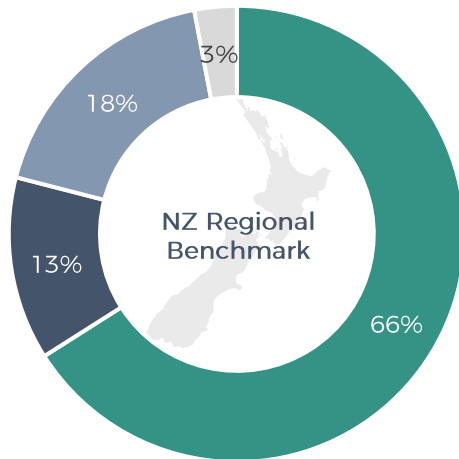
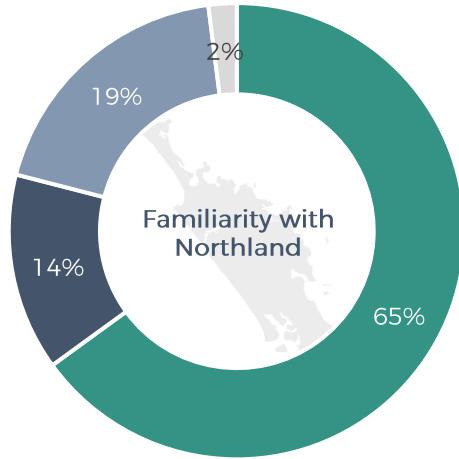
	Total Sample	Recent Visitors
<b>Region of Residence</b>		
Auckland	35%	60% ▲
Waikato	10%	10%
Bay of Plenty	6%	8%
Tairāwhiti / Gisborne	-	1%
Hawke's Bay	5%	2% ▼
Taranaki	3%	2%
Manawatū-Whanganui	5%	3%
Wellington (& Wairarapa)	11%	5% ▼
Tasman	1%	0%
Nelson	2%	1%
Marlborough	1%	1%
West Coast	0%	0%
Canterbury	14%	4% ▼
Otago	5%	1% ▼
Southland	2%	2%
North Island (NET)	75%	92% ▲
South Island (NET)	25%	8% ▼

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

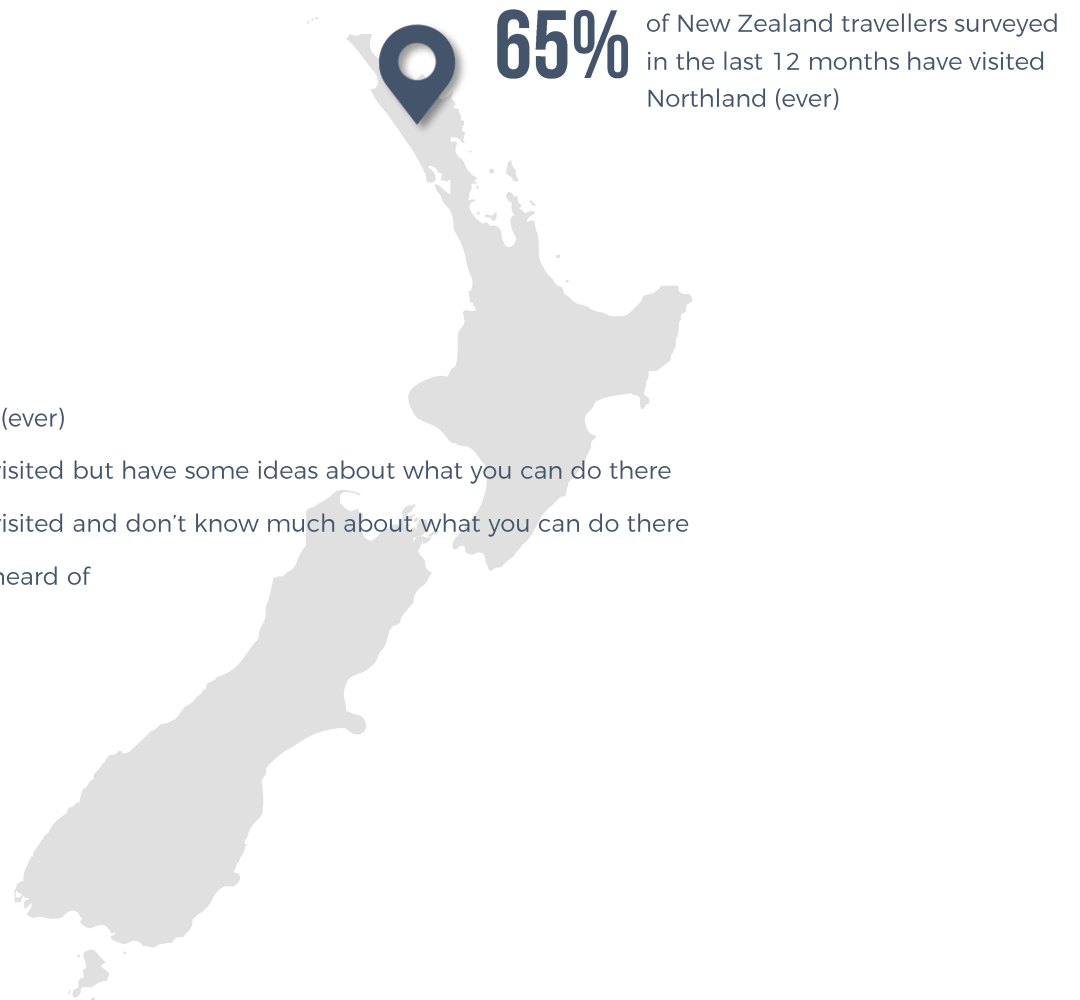
▲ / ▼ Significantly higher or lower than total sample at 95% confidence

# 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





# PLACE ASSOCIATIONS

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

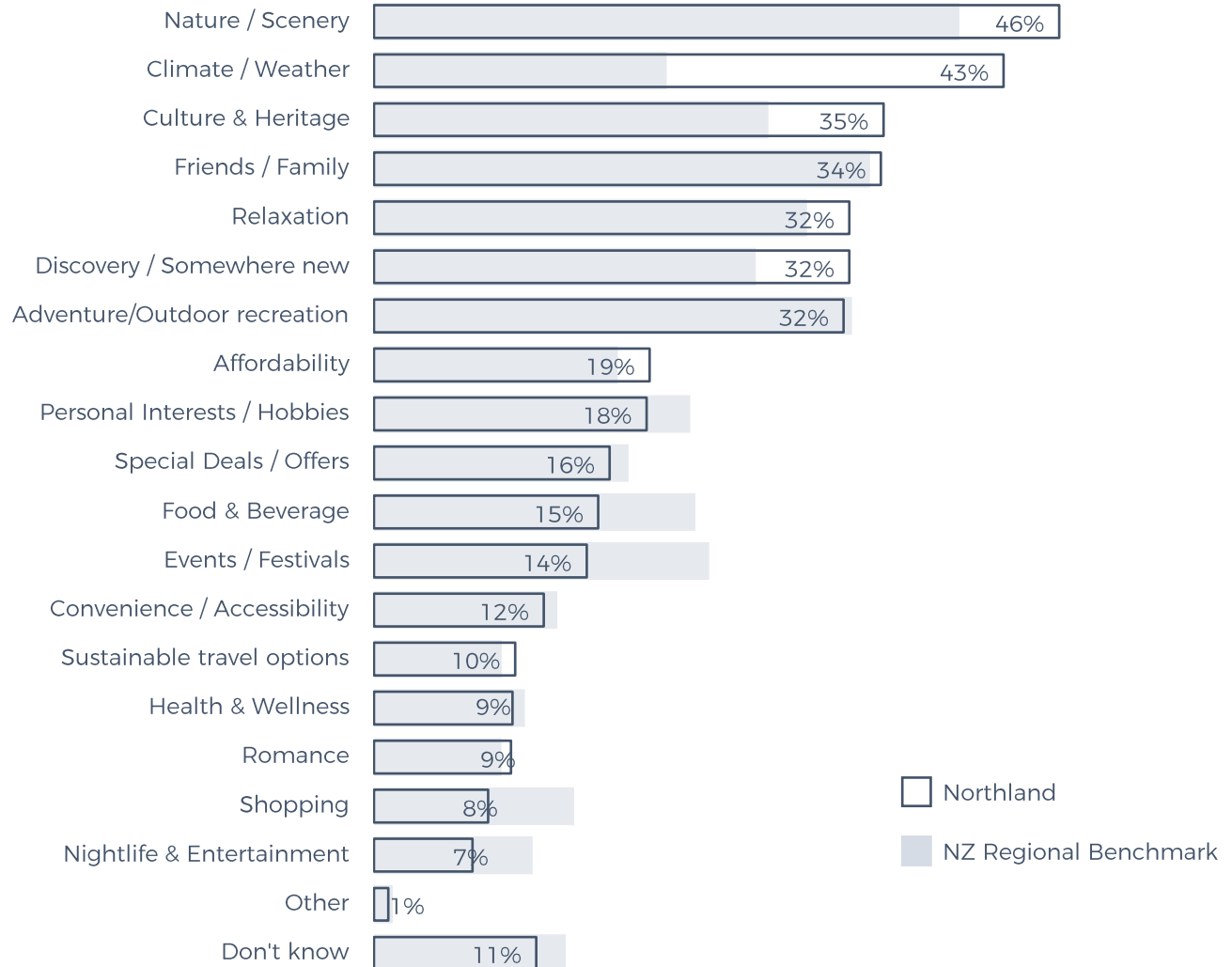


Bay of Islands (NET)	50%
Bay of Islands	13%
Kerikeri	10%
Paihia	8%
Russell	10%
Waitangi / Waitangi Treaty Grounds	7%
Kaikohe	1%
Top of the North (NET)	34%
Cape Reinga	17%
Ninety Mile Beach	9%
Kaitaia	7%
Whangārei & Surrounds (NET)	6%
Whangārei	2%
Mangawhai	2%
Tutukākā / Poor Knights Islands	1%
Waipu	1%
Ruakākā	1%
Kauri Coast & Hokianga (NET)	6%
Dargaville	2%
Waipoua Forest / Tane Mahuta	3%
Opononi	1%
Hokianga	1%

The most common misattributions are Auckland (4%), Bay of Plenty (1%), and the Coromandel (1%).

# DESTINATION DRIVERS

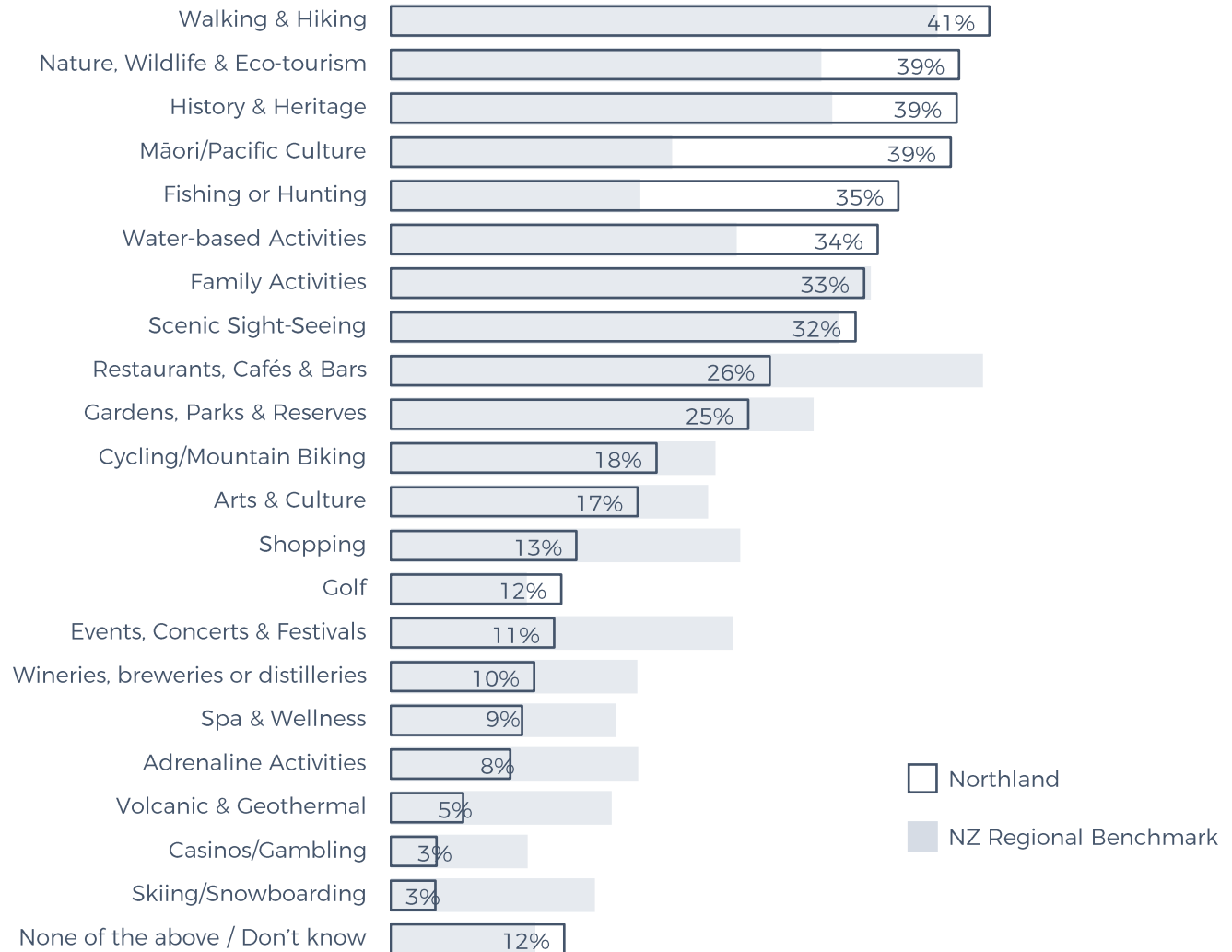
Why might someone choose to visit Northland instead of another New Zealand destination?



# ACTIVITIES / EXPERIENCES



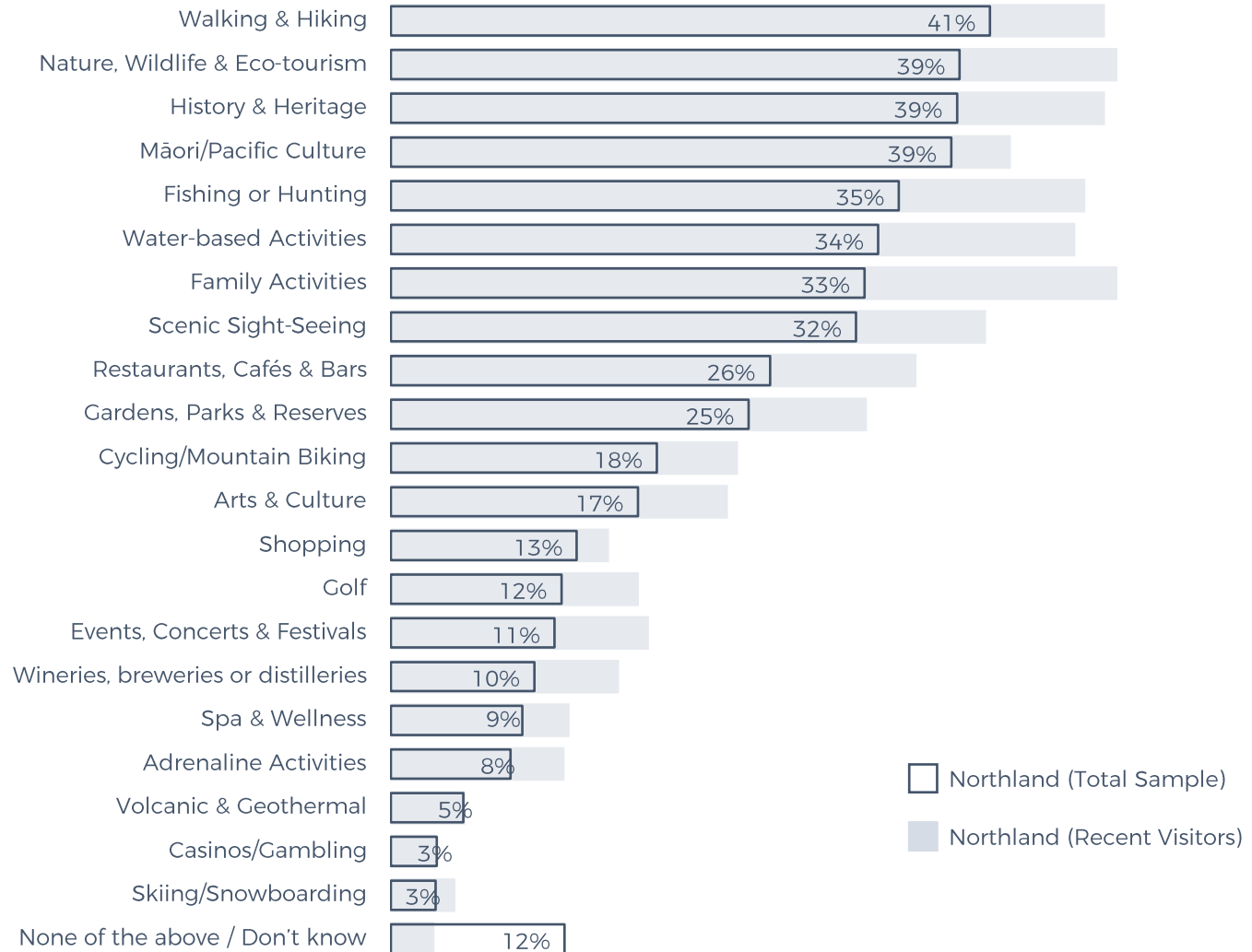
Which, if any, of the following activities or experiences do you associate with Northland?



# ACTIVITIES / EXPERIENCES

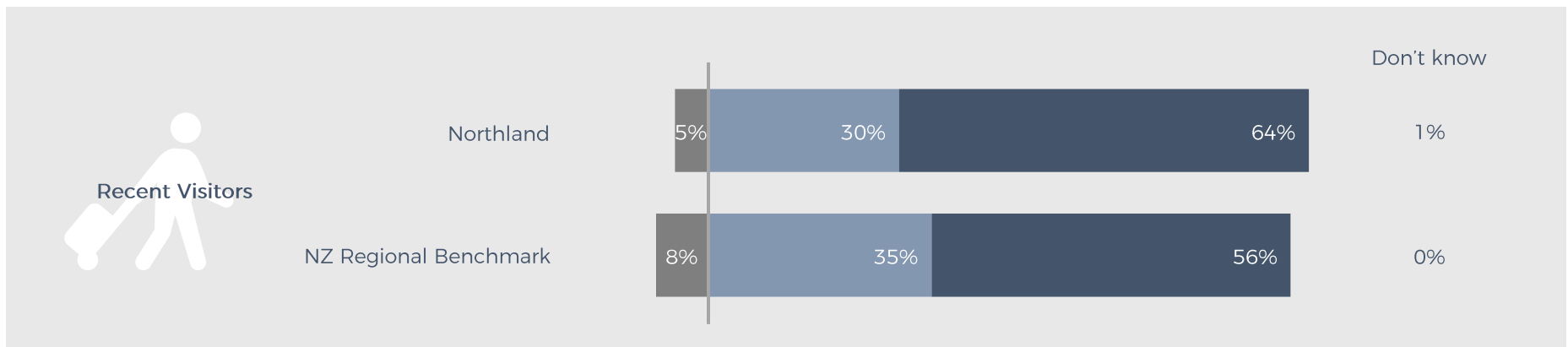
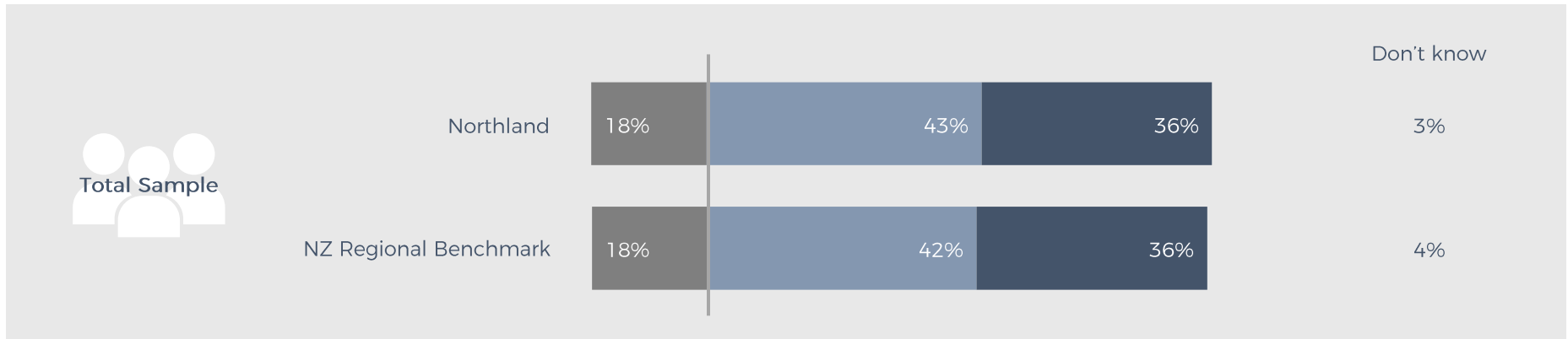


Which, if any, of the following activities or experiences do you associate with Northland?



# DESTINATION APPEAL

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



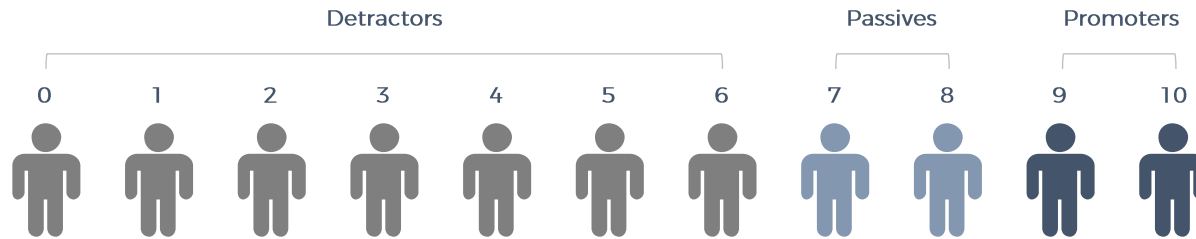
Not very appealing / Not at all appealing
  Somewhat appealing
  Highly appealing

# NET PROMOTOR SCORE (NPS)

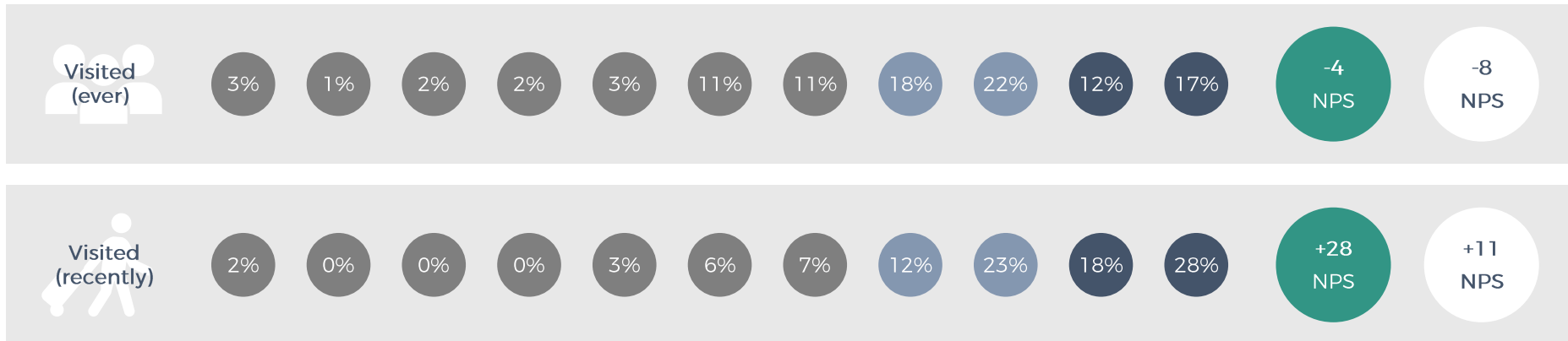


How likely are you to recommend Northland as a travel destination to a friend, family member, or colleague?

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

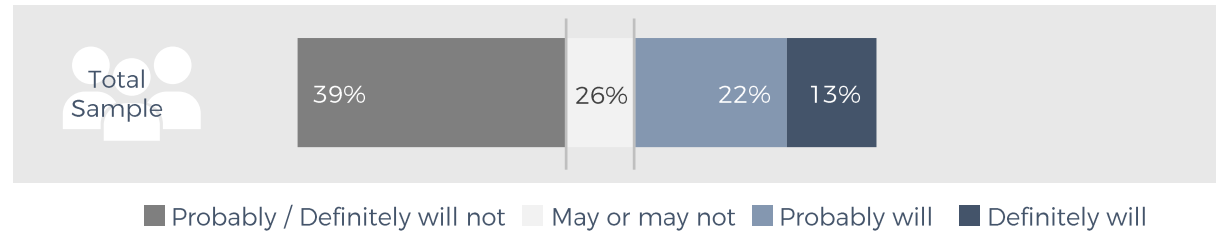


# PROPENSITY TO VISIT

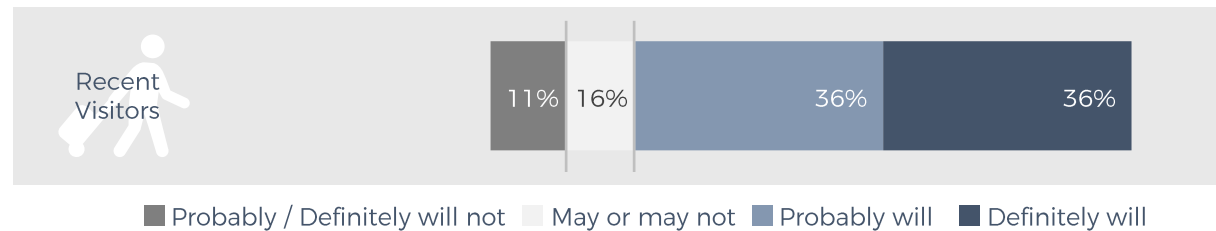
How likely are you to visit Northland, for any reason, within the next 12 months?



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



**72%** 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?



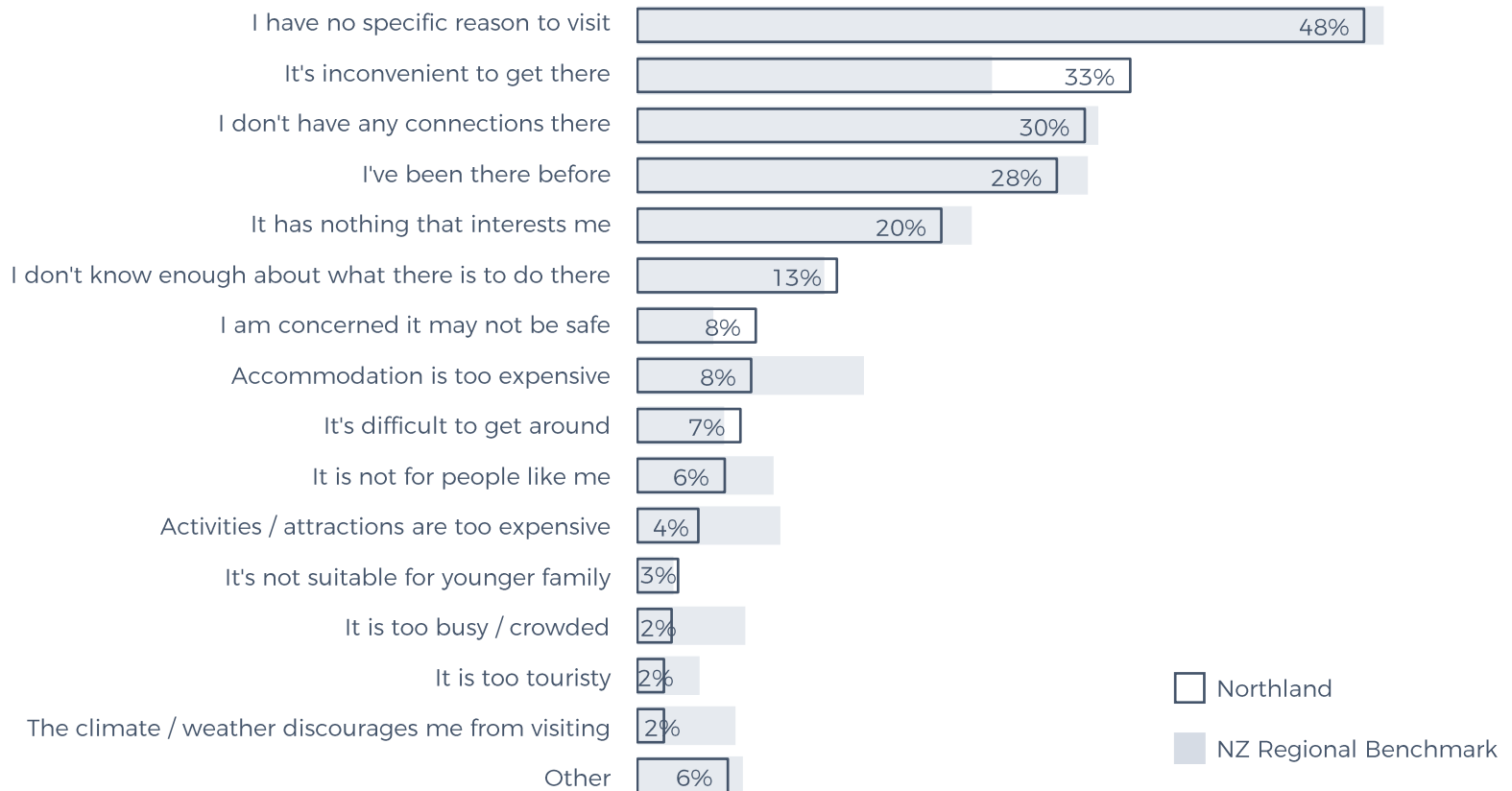
	Total Sample	Prospective Visitors
<b>Region of Residence</b>		
Auckland	35%	54% ▲
Waikato	10%	10%
Bay of Plenty	6%	7%
Tairāwhiti / Gisborne	-	0%
Hawke's Bay	5%	3%
Taranaki	3%	2%
Manawatū-Whanganui	5%	3% ▼
Wellington (& Wairarapa)	11%	9%
Tasman	1%	0%
Nelson	2%	1%
Marlborough	1%	1%
West Coast	0%	0%
Canterbury	14%	7% ▼
Otago	5%	2%
Southland	2%	1% ▼
North Island (NET)	75%	88% ▲
South Island (NET)	25%	12% ▼

	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%	21%
50-59 years	17%	14%
60-69 years	13%	10%
70+ years	14%	10% ▼
<b>Household Composition</b>		
My husband, wife or partner	59%	63%
My mother and/or father	6%	6%
My children aged under 5	11%	13%
My children aged 5 to 14	17%	24% ▲
My children aged 15 or older	14%	19% ▲
Other family/relatives	10%	11%
Other person(s)	7%	6%
None of the above - I live alone	16%	10% ▼

▲ / ▼ 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?



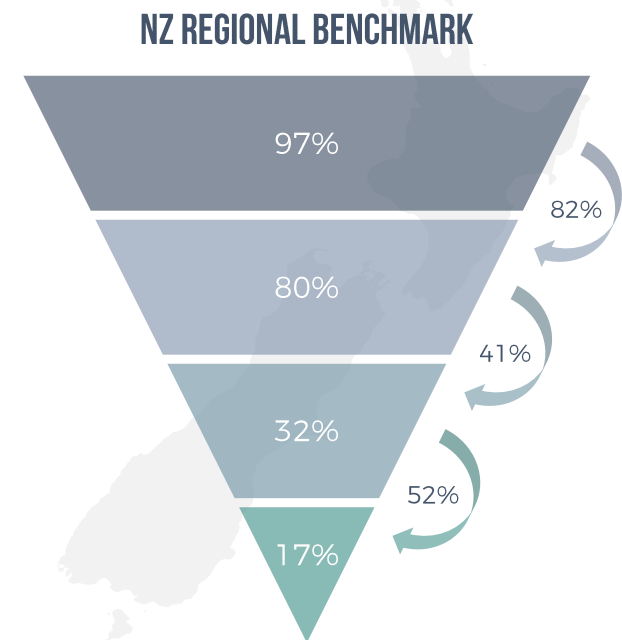
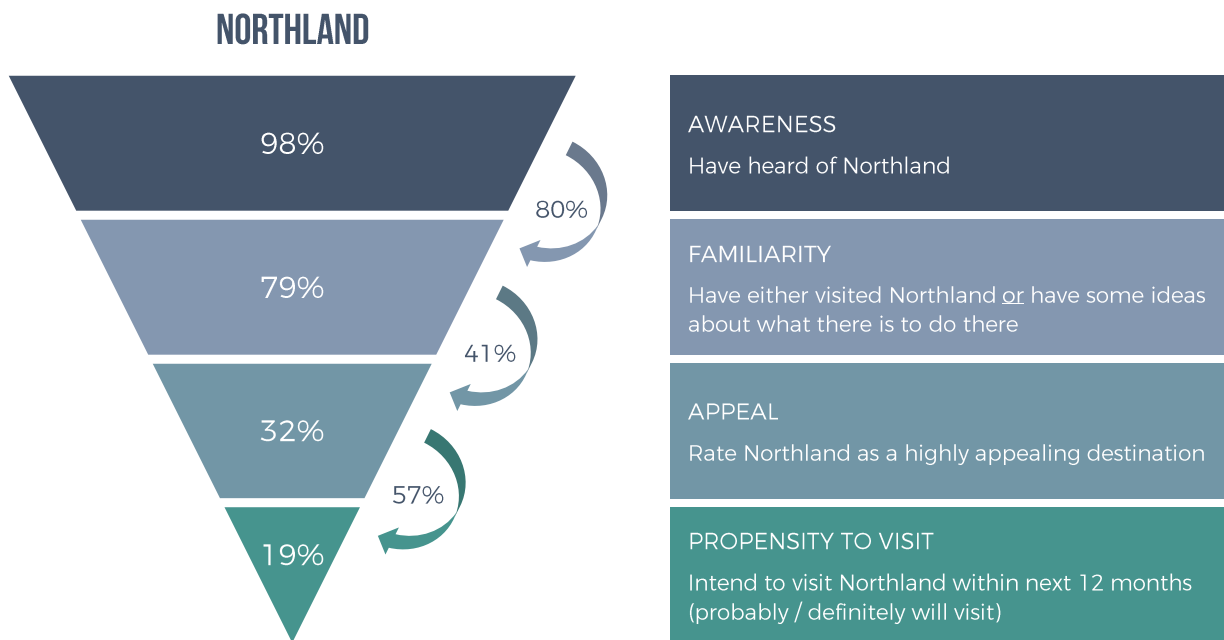
# CONVERTING AWARENESS TO VISITATION



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.

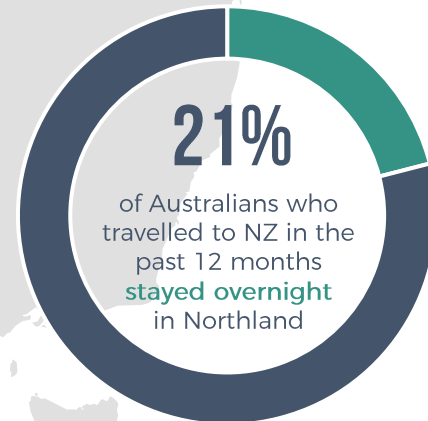


A woman wearing a light-colored hat and a light-colored top is seen from behind, standing on a wooden suspension bridge. The bridge has thick wooden beams and ropes. The background is a dense forest of tall, thin trees. The entire image is overlaid with a semi-transparent blue filter. On the left side, there is a large white circle containing the text.

**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?



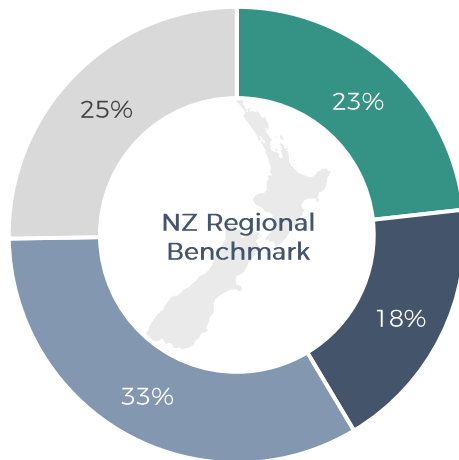
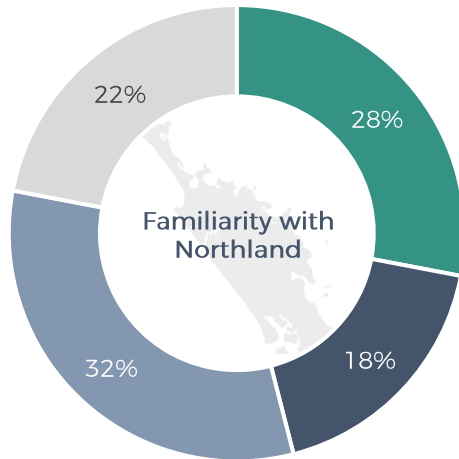
	Total Sample	Recent Visitors
<b>Region of Residence</b>		
Australian Capital Territory	2%	7% ▲
New South Wales	31%	31%
Northern Territory	1%	3%
Queensland	20%	21%
South Australia	7%	6%
Tasmania	2%	2%
Victoria	26%	21%
Western Australia	10%	10%

	Total Sample	Recent Visitors
<b>Age</b>		
18-19 years	3%	2%
20-29 years	17%	21%
30-39 years	19%	36% ▲
40-49 years	16%	15%
50-59 years	16%	11% ▼
60-69 years	15%	8%
70+ years	14%	9% ▼
<b>Household Composition</b>		
My husband, wife or partner	60%	66%
My mother and/or father	6%	6%
My children aged under 5	10%	16%
My children aged 5 to 14	20%	35% ▲
My children aged 15 or older	15%	11%
Other family/relatives	8%	3% ▼
Other person(s)	5%	4%
None of the above - I live alone	16%	12%

▲ / ▼ 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]

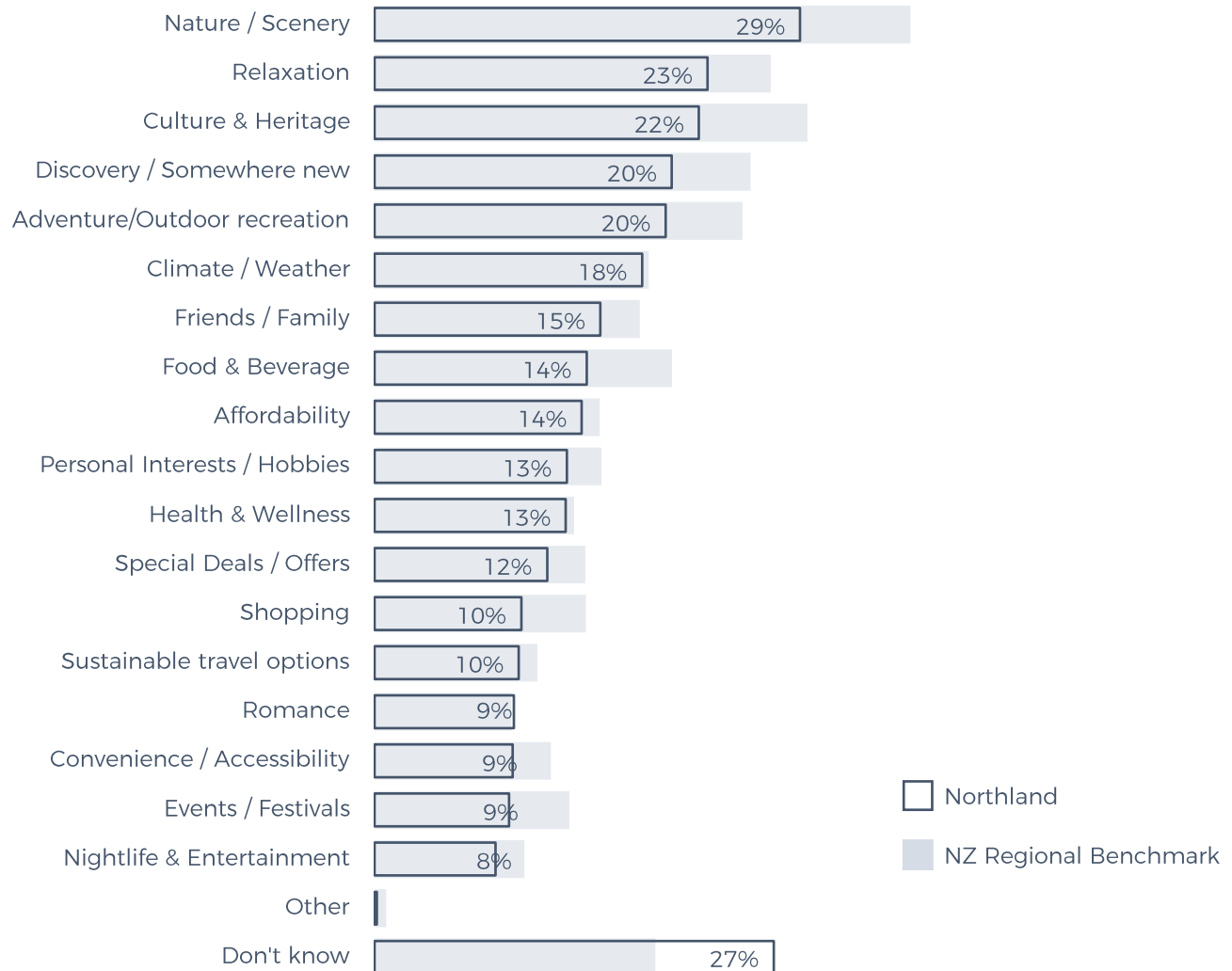


Bay of Islands (NET)	19%
Bay of Islands	12%
Kerikeri	2%
Paihia	1%
Russell	2%
Waitangi / Waitangi Treaty Grounds	3%
Top of the North (NET)	9%
Cape Reinga	5%
Ninety Mile Beach	3%
Whangārei & Surrounds (NET)	4%
Whangārei	3%
Kauri Coast & Hokianga (NET)	2%
Waipoua Forest / Tane Mahuta	2%

The most common misattribution is Auckland (3%)

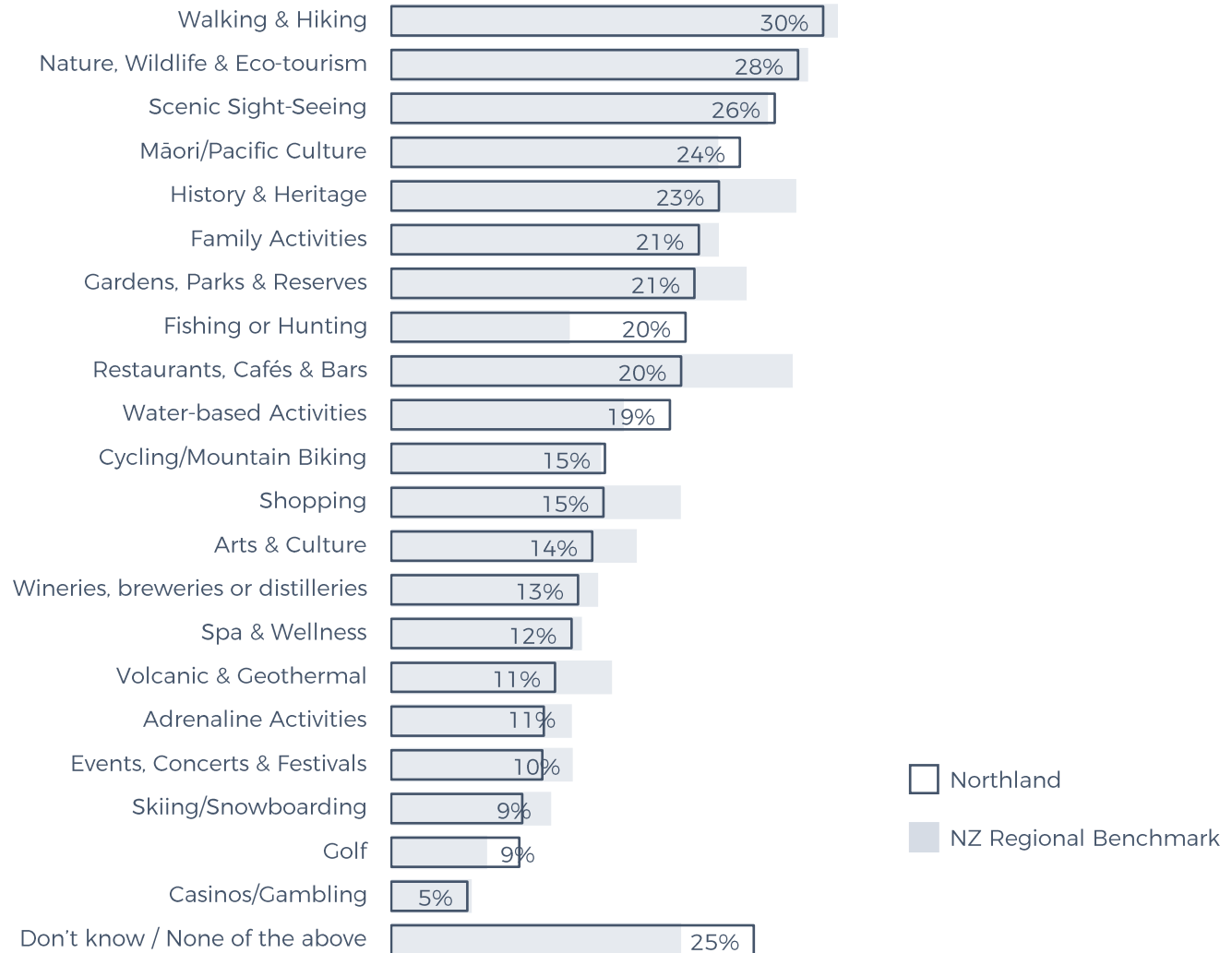
# DESTINATION DRIVERS

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



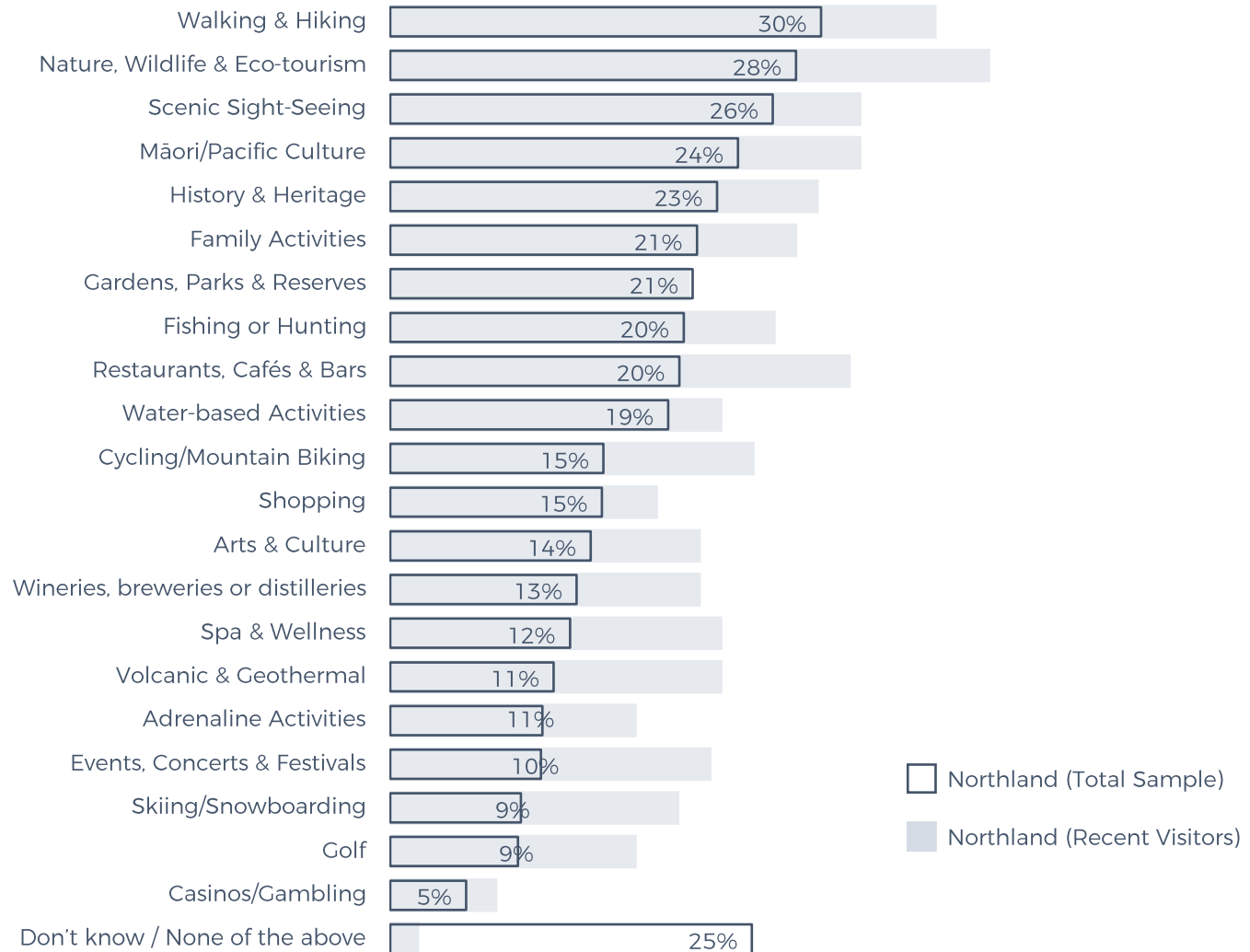
# ACTIVITIES / EXPERIENCES

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



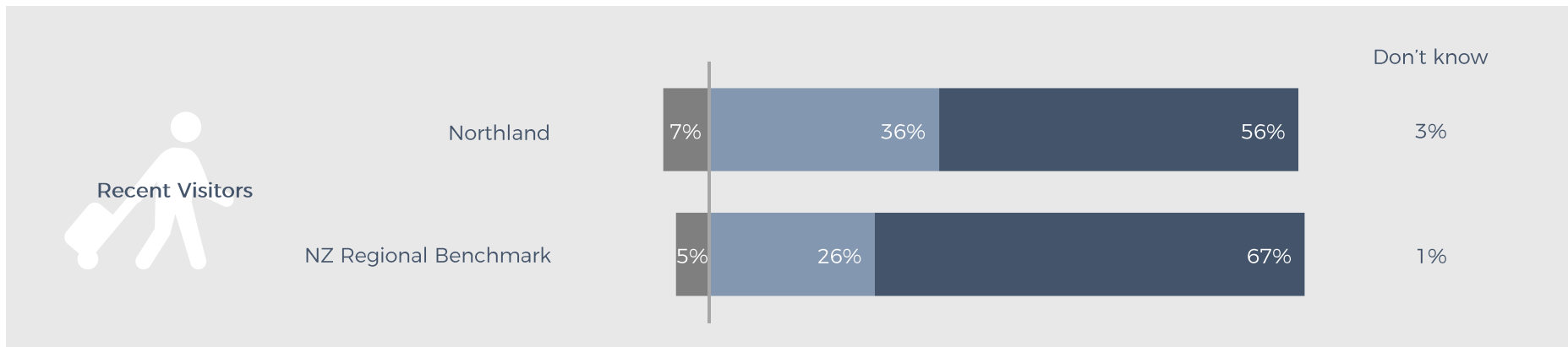
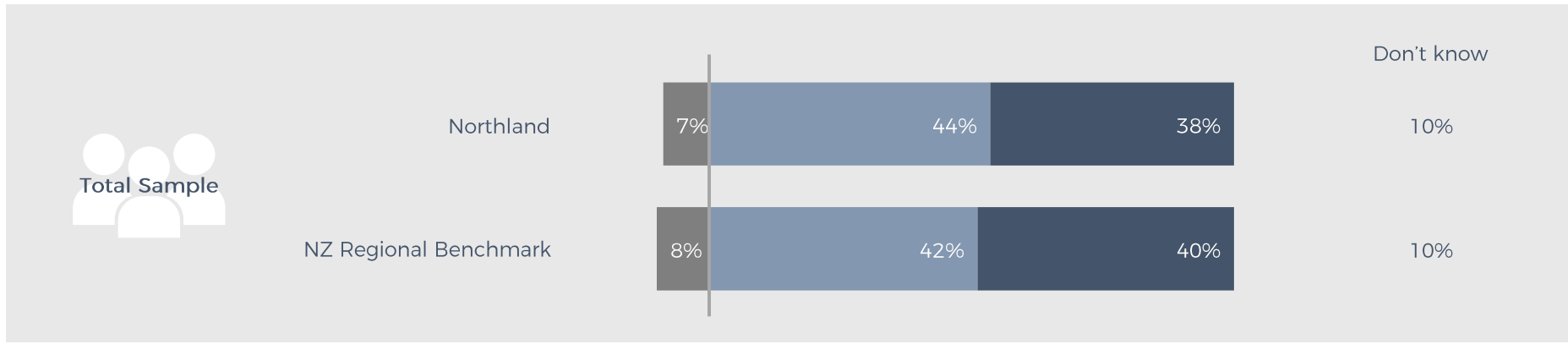
# ACTIVITIES / EXPERIENCES

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?



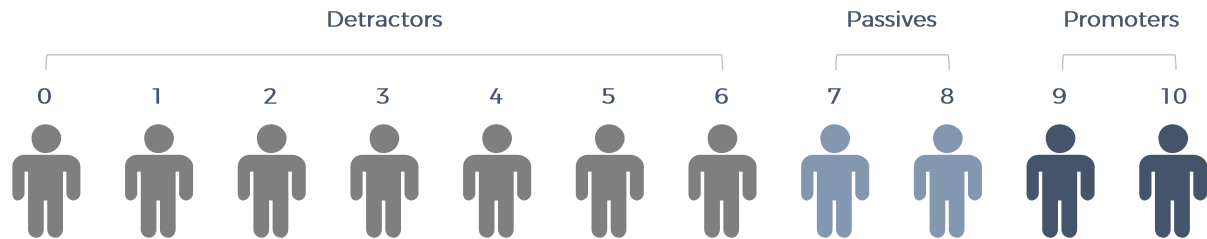
Not very appealing / Not at all appealing
  Somewhat appealing
  Highly appealing

# NET PROMOTOR SCORE (NPS)

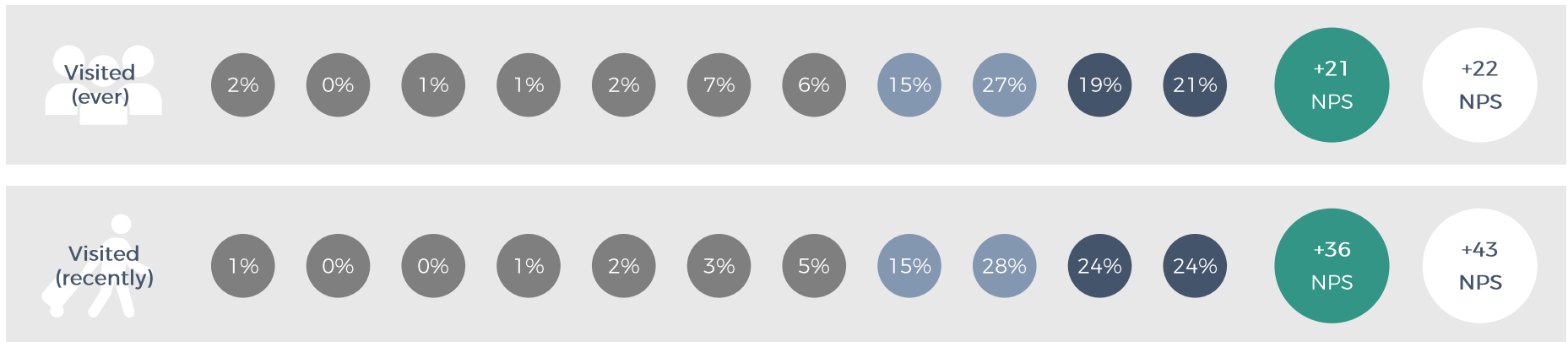
How likely are you to recommend Northland as a travel destination to a friend, family member, or colleague?



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

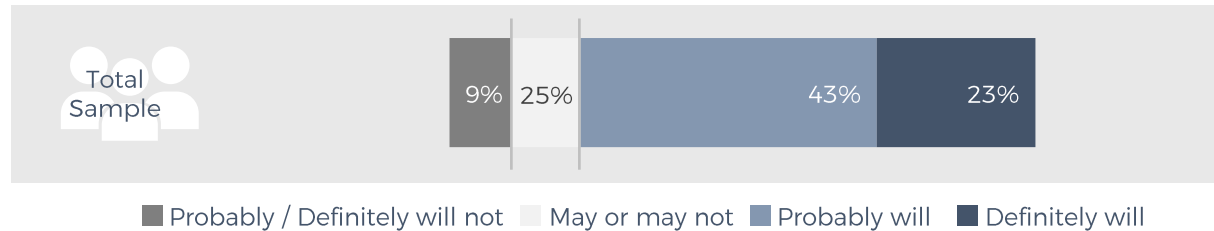


# PROPENSITY TO VISIT

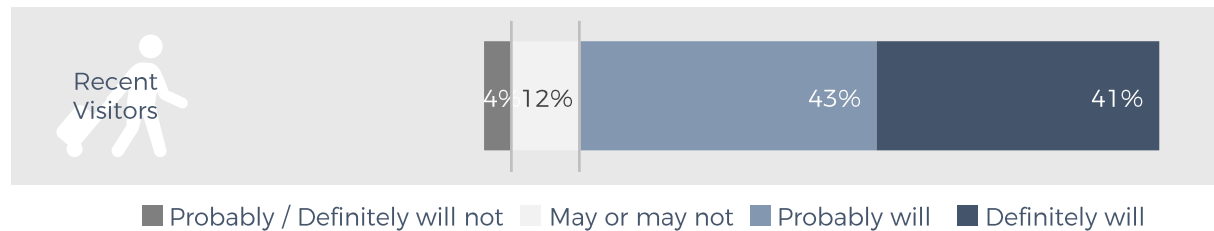
How likely are you to visit Northland, for any reason, within the next 12 months?



**66%** of AU travellers who intend to visit New Zealand in the next 12 months intend to visit Northland



**84%** 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?



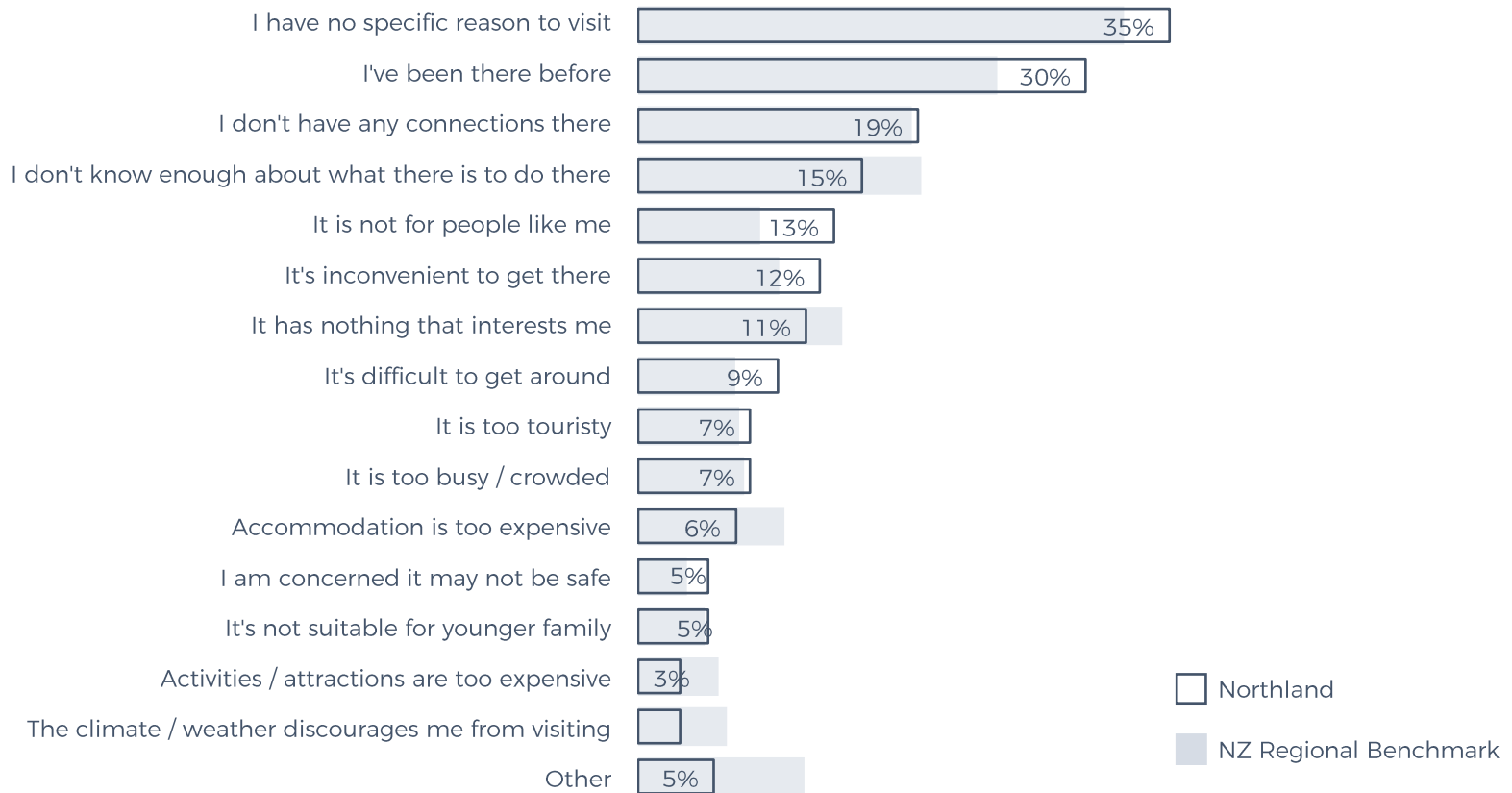
	Total Sample	Prospective Visitors
<b>Region of Residence</b>		
Australian Capital Territory	2%	6% ▲
New South Wales	31%	31%
Northern Territory	1%	3% ▲
Queensland	20%	16%
South Australia	7%	7%
Tasmania	2%	3%
Victoria	26%	25%
Western Australia	10%	11%

	Total Sample	Prospective Visitors
<b>Age</b>		
18-19 years	3%	2%
20-29 years	17%	25% ▲
30-39 years	19%	35% ▲
40-49 years	16%	15%
50-59 years	16%	9% ▼
60-69 years	15%	10% ▼
70+ years	14%	3% ▼
<b>Household Composition</b>		
My husband, wife or partner	60%	62%
My mother and/or father	6%	8%
My children aged under 5	10%	14% ▲
My children aged 5 to 14	20%	33% ▲
My children aged 15 or older	15%	13%
Other family/relatives	8%	7%
Other person(s)	5%	3%
None of the above - I live alone	16%	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. More than three fourths (78%) of Australian travellers surveyed have heard of Northland. As we move down the funnel, each stage introduces a new measure. The 12% 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.



