

KANTAR

Domestic Travel View Report (DTVR)

Quarterly: April 2022

May 2022



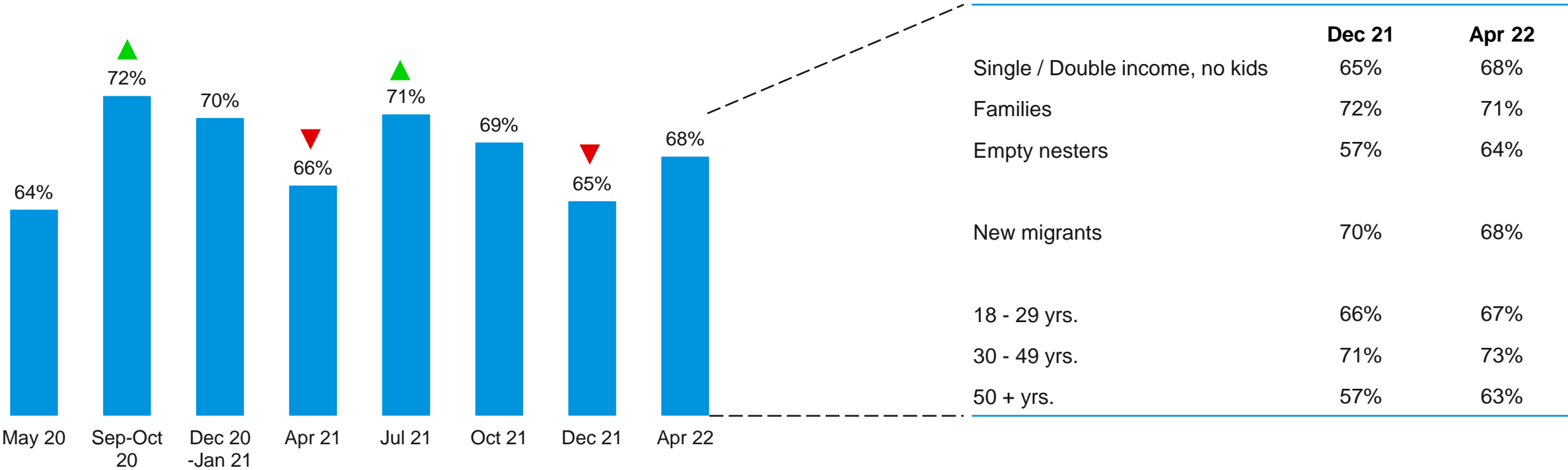
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Demand for
domestic holidays



68% of NZers plan to have a domestic holiday in the next 12 months, which is similar to the level of demand seen the same month a year ago and in Dec 21

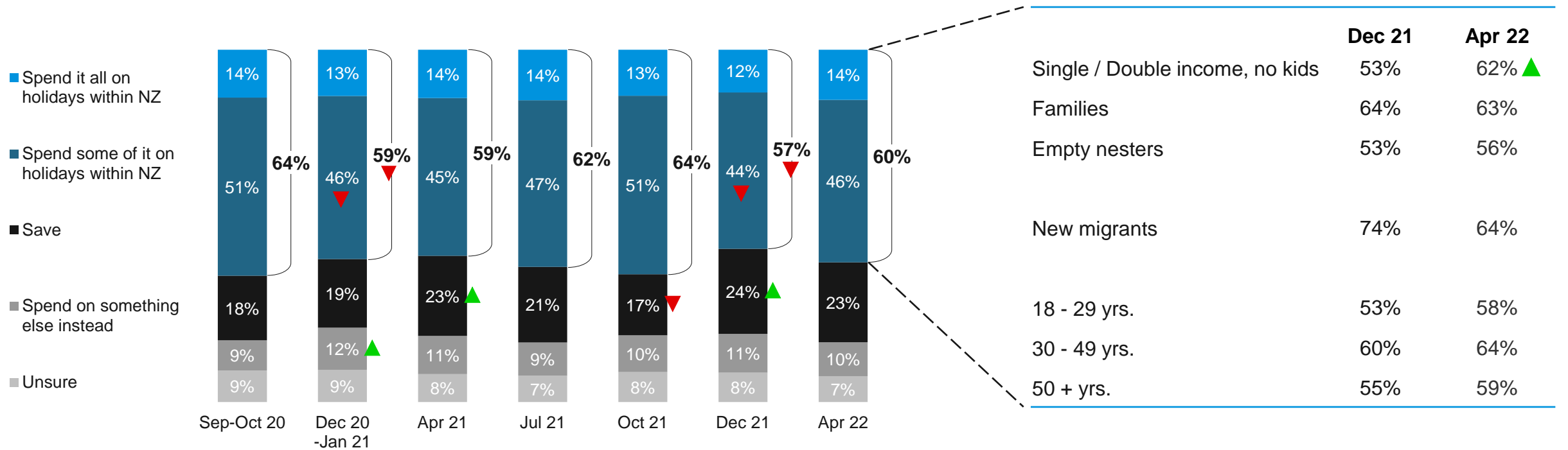
% NZers intending to holiday domestically in the next 12 months – total and by segment (% ‘Yes, planning a holiday’)



▲ ▼ Significantly higher / lower than previous quarter

The majority of NZers plan to continue to spend their holiday budgets domestically

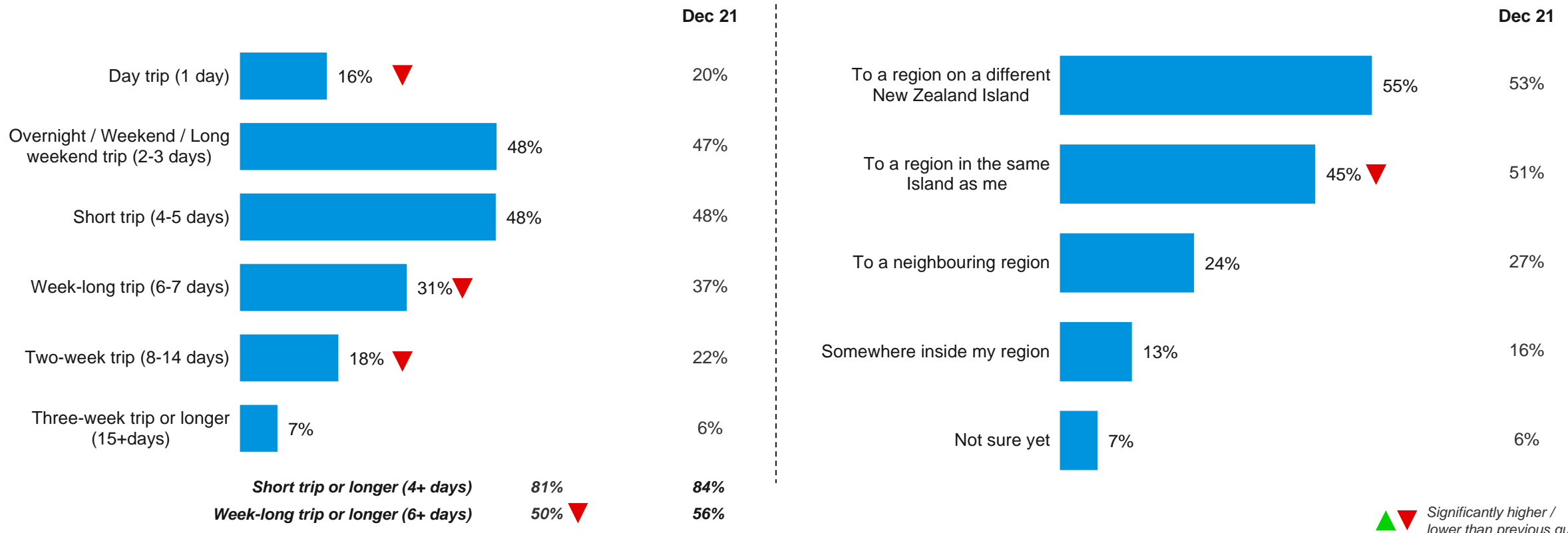
What NZers plan to do with money saved on overseas holidays due to Covid-19 – total and by segment
(% NZers who will take a domestic holiday in next 12 months)



▲ ▼ Significantly higher / lower than previous quarter

Compared to Dec 21, less NZers plan to take a domestic holiday longer than six days

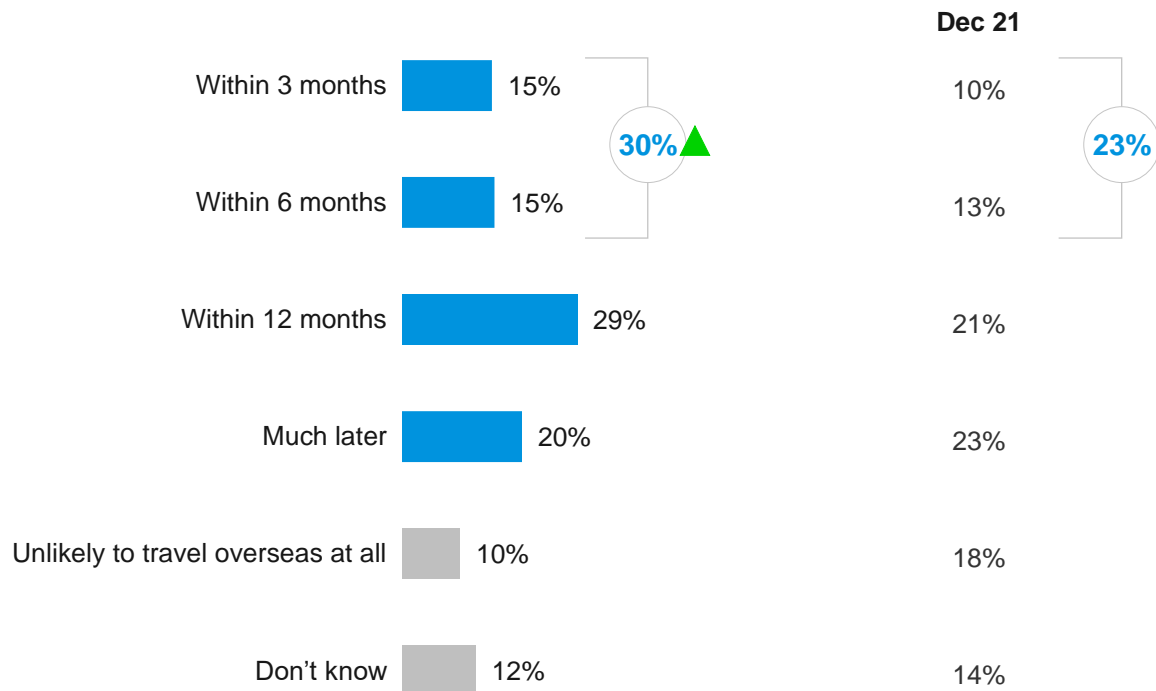
Where NZers want to travel for a holiday and for how long (% NZers who will take a domestic holiday in the next 12 months, Apr 22)



▲ ▼ Significantly higher / lower than previous quarter

With the barriers to return to New Zealand now removed for all NZers, the proportion of NZers wanting to take an overseas holiday in the next 6 months has increased vs. Dec 21

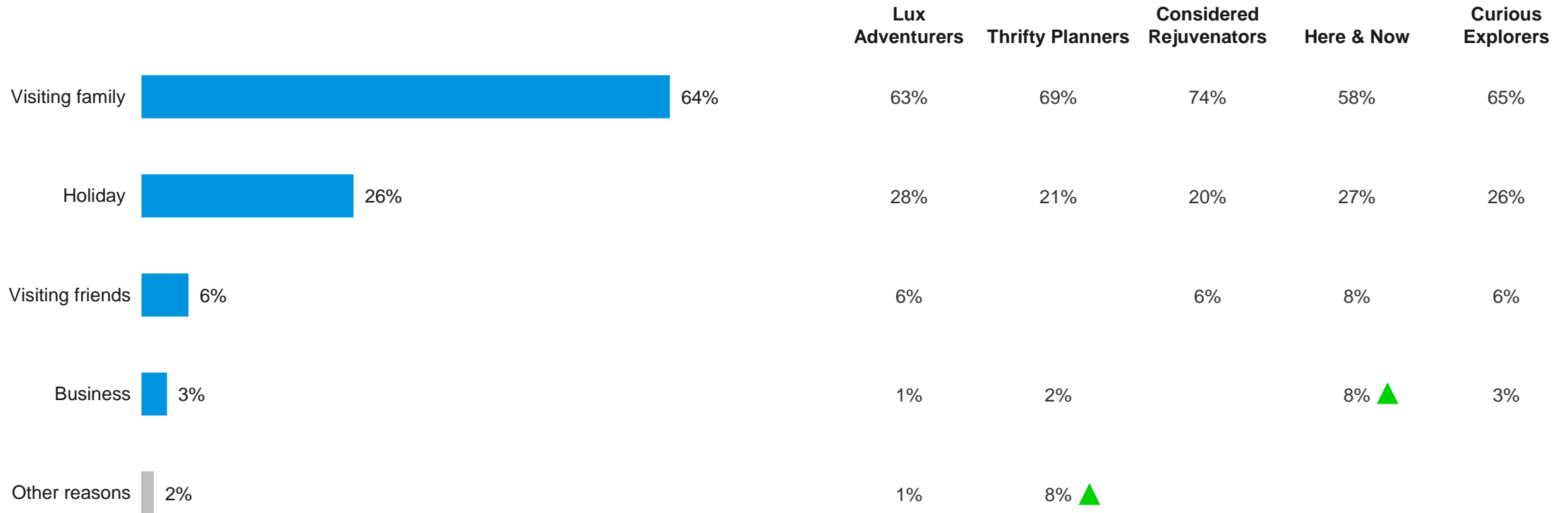
Intention to travel overseas for a holiday without self-isolation (% All NZers, Apr 22)



▲ ▼ Top 2 significantly higher / lower than previous quarter

The main reason for the first overseas trip in the next six months is to visit family

Main reason for first overseas trip in the next 6 months – total and by mindset (Apr 22)



▲ ▼ Significantly higher / lower than other mindsets

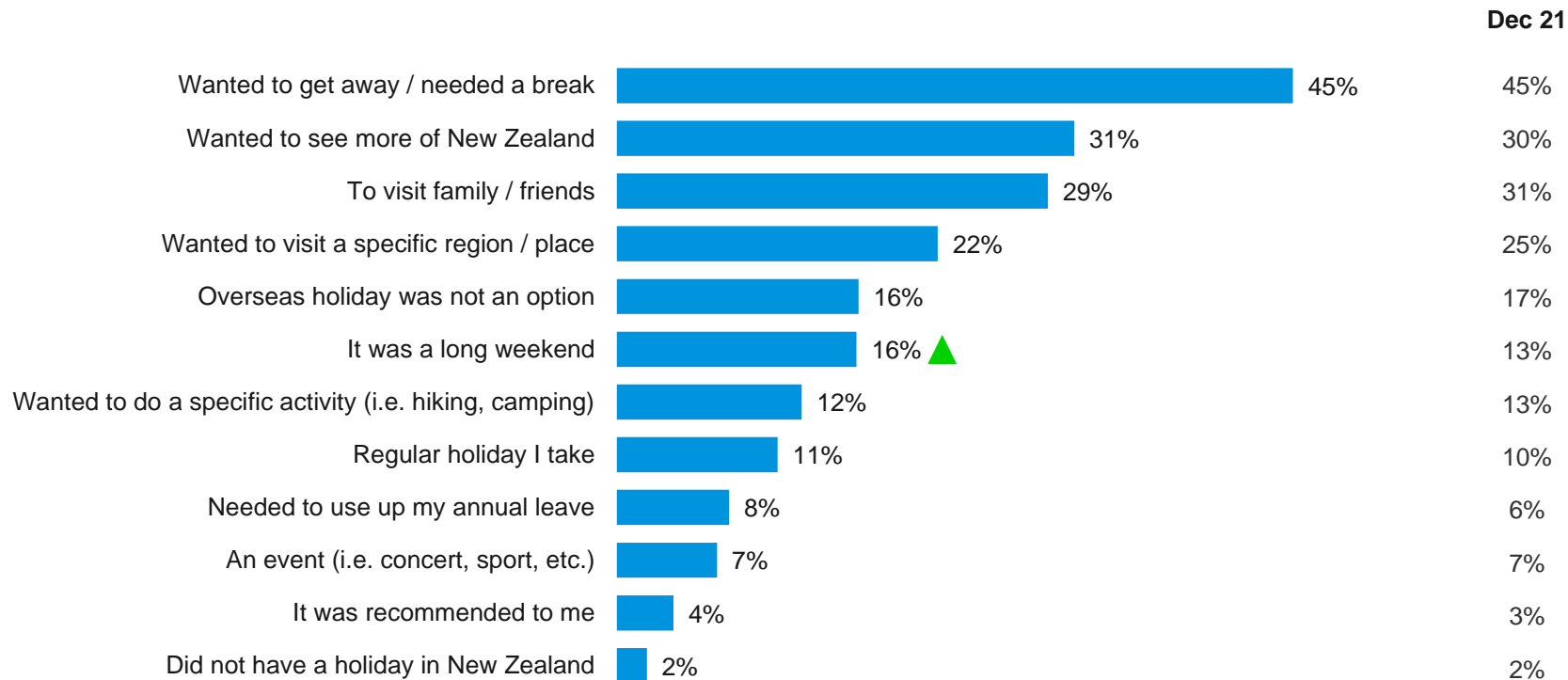
2

Perceptions of New Zealand holidays



The key triggers for taking a domestic holiday remain unchanged: needing a break, wanting to see more of New Zealand and visiting family or friends

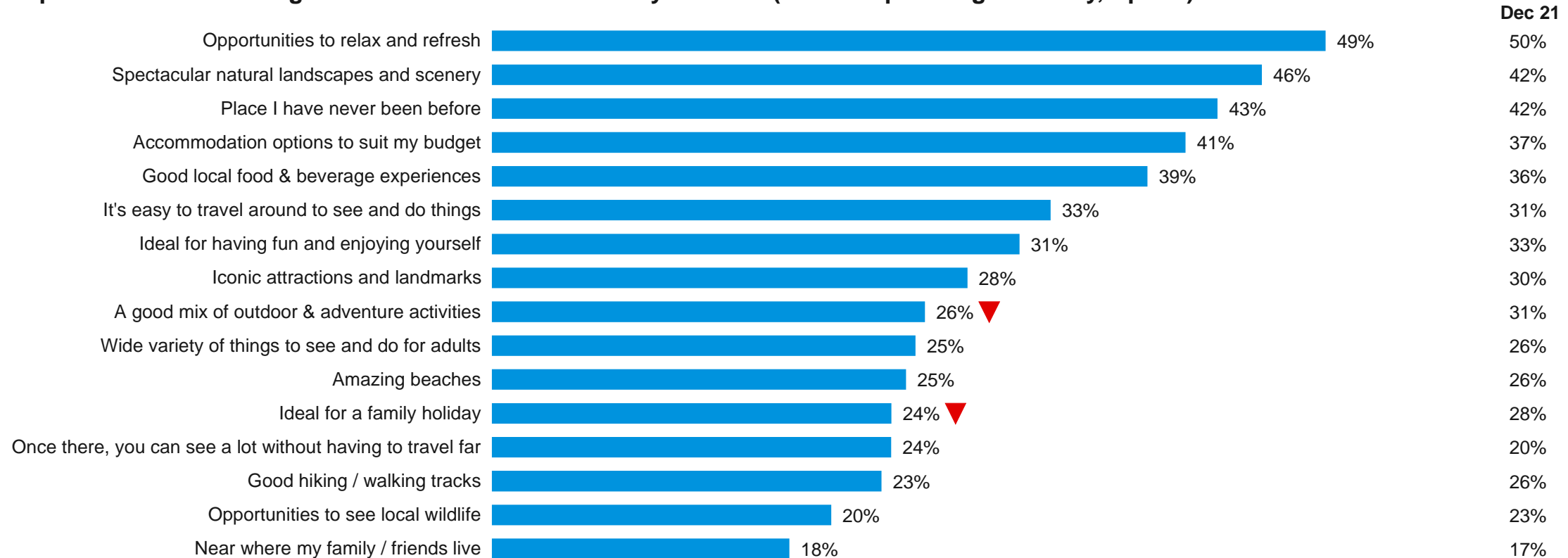
Reasons for the last holiday within New Zealand (% All NZers, Apr 22)



▲ ▼ Significantly higher / lower than previous quarter

When choosing where to holiday within New Zealand, NZers are motivated by opportunities to relax, spectacular landscapes and exploring new places – this is unchanged from Dec 21

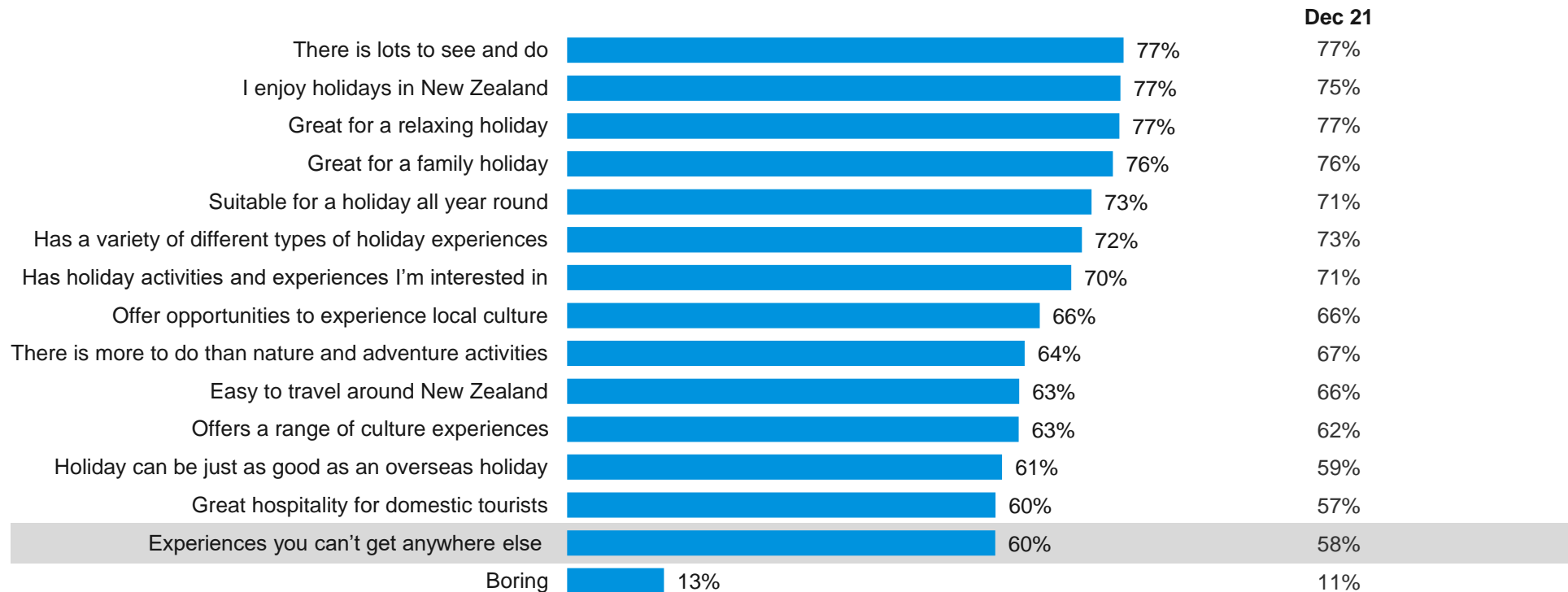
Aspect NZers are looking for in the New Zealand holiday location (% NZers planning a holiday, Apr 22)



▲ ▼ Significantly higher / lower than previous quarter

Perceptions of New Zealand holidays have been stable compared to Dec 21

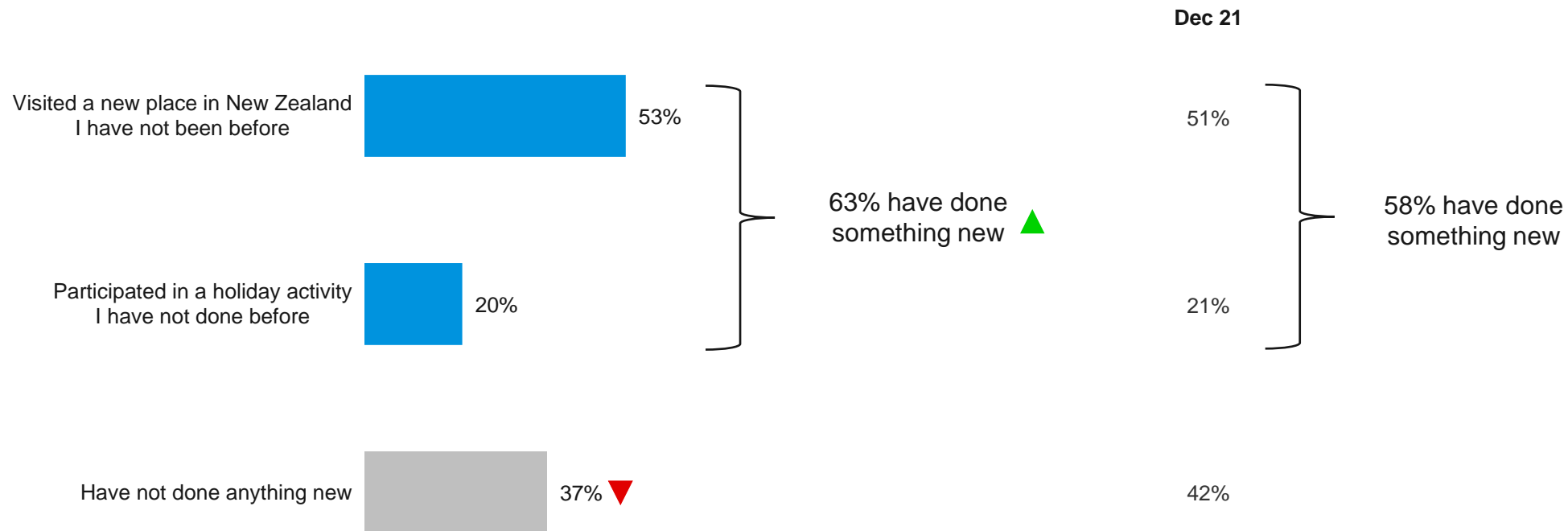
Perceptions of New Zealand holidays (% All NZers who agree with the statement, Apr 22)



▲ ▼ Significantly higher / lower than previous quarter

There has been an increase in the proportion of NZers who state to have done something new in the last 12 months

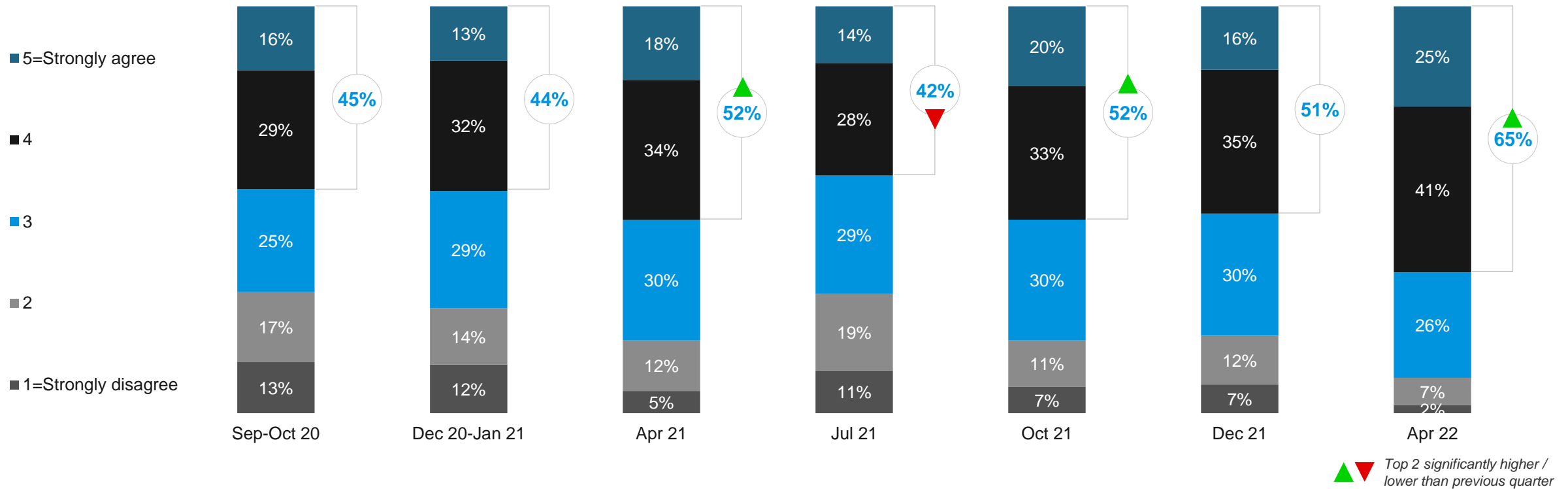
Have you done any of the following in the last 12 months (% All NZers, Apr 22)



▲ ▼ Significantly higher / lower than previous quarter

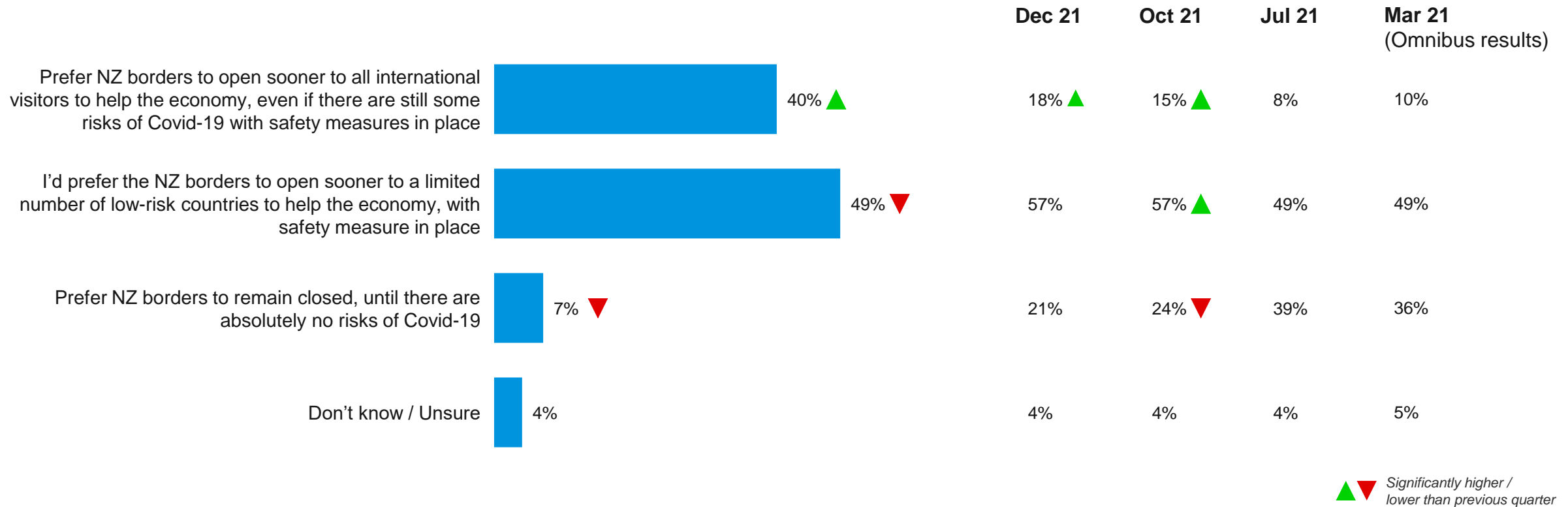
The proportion of NZers that are keen to see international visitors back reaches an all-time high

KPI: New Zealanders are open to international tourists coming to New Zealand (% All NZers)



The desire to see New Zealand borders opening to all international visitors despite Covid-19 risks has reached an all-time high of 40%

Which one of these statements best reflects your view (% All NZers, Apr 22)



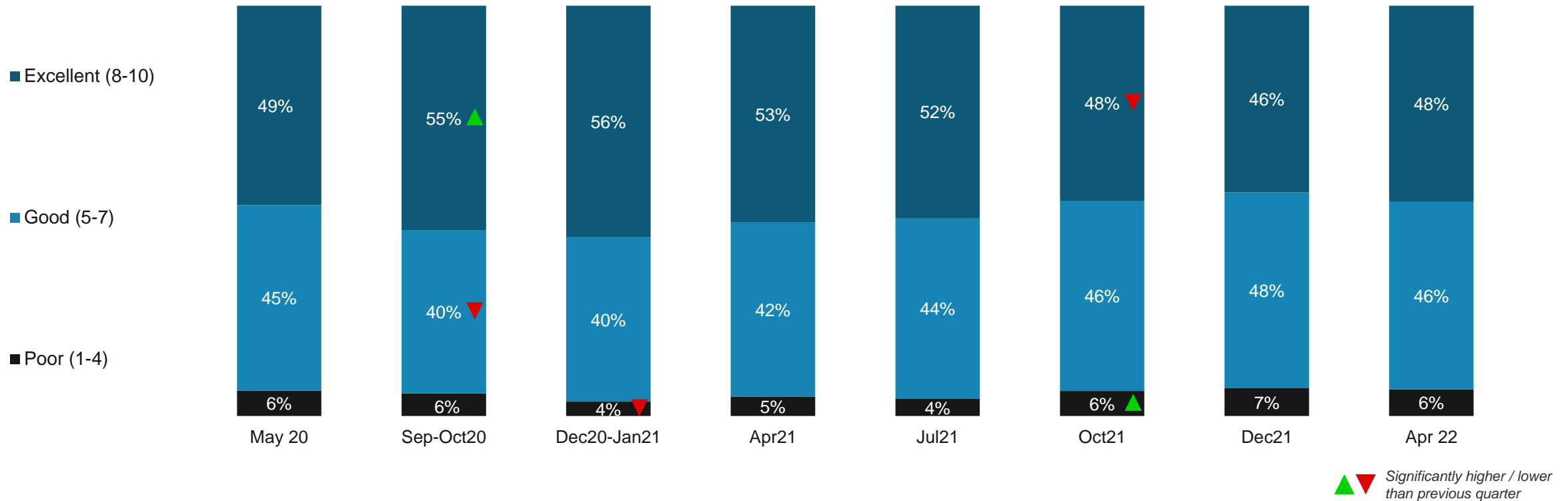
4

New Zealand holiday experience



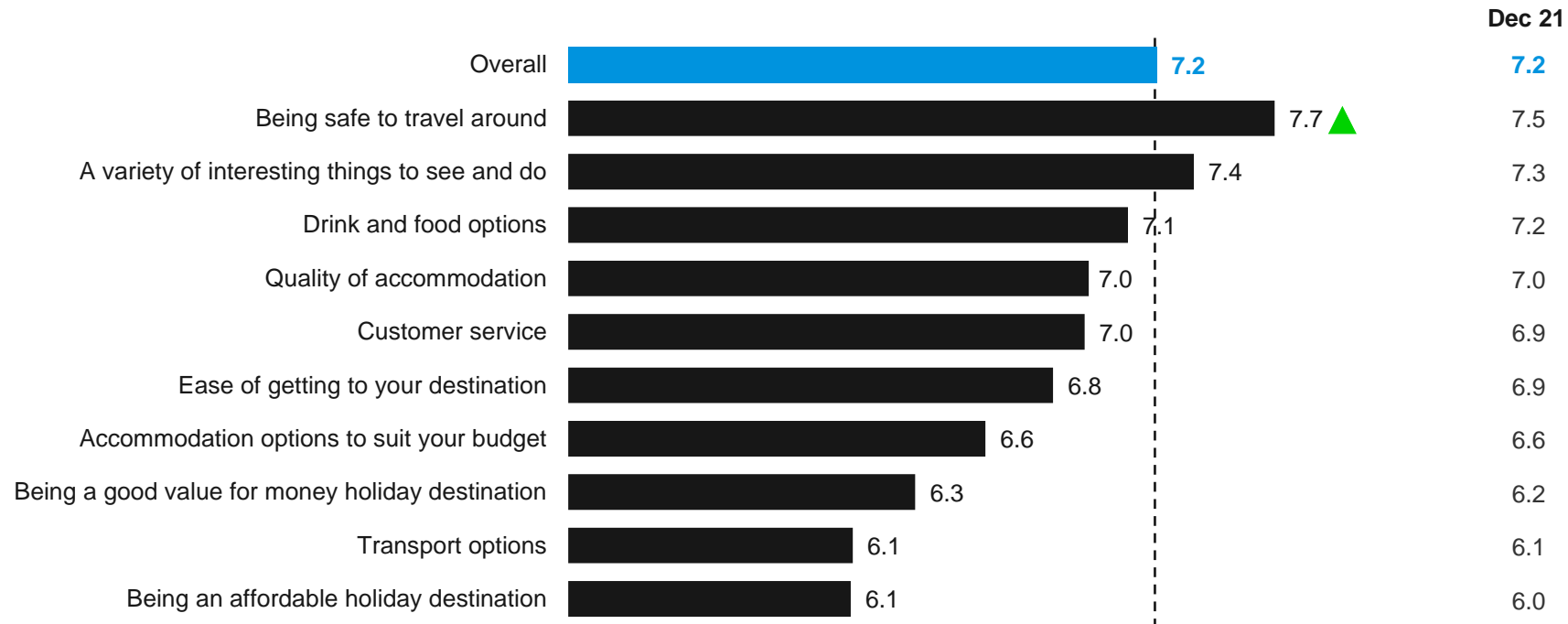
Perceptions of how well New Zealand holidays deliver to expectations have been stable in the last few quarters but declined vs. high of Dec-Jan 21

How well New Zealand delivers to expectations as a holiday destination (% All NZers who agree with the statement)



Perceptions of how well New Zealand delivers on 'being safe to travel around' have strengthened this quarter

How well New Zealand delivers on various holiday experiences (mean score, Apr 22)

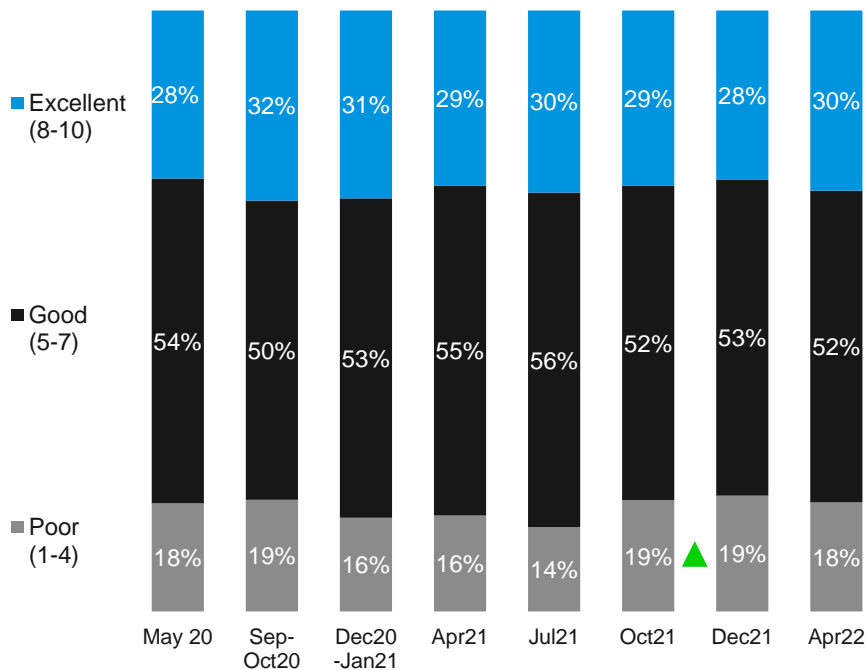


▲ ▼ Significantly higher / lower than previous quarter

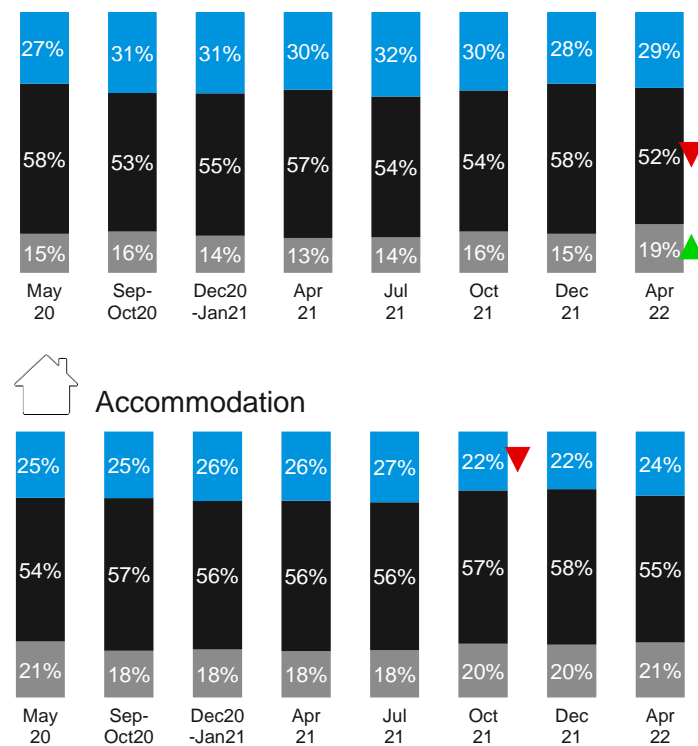
Perceptions towards overall value for money of domestic holidays are stable, despite some decline in perceptions towards food and drink options

Perceptions value for money of holidays within New Zealand (% All NZers)

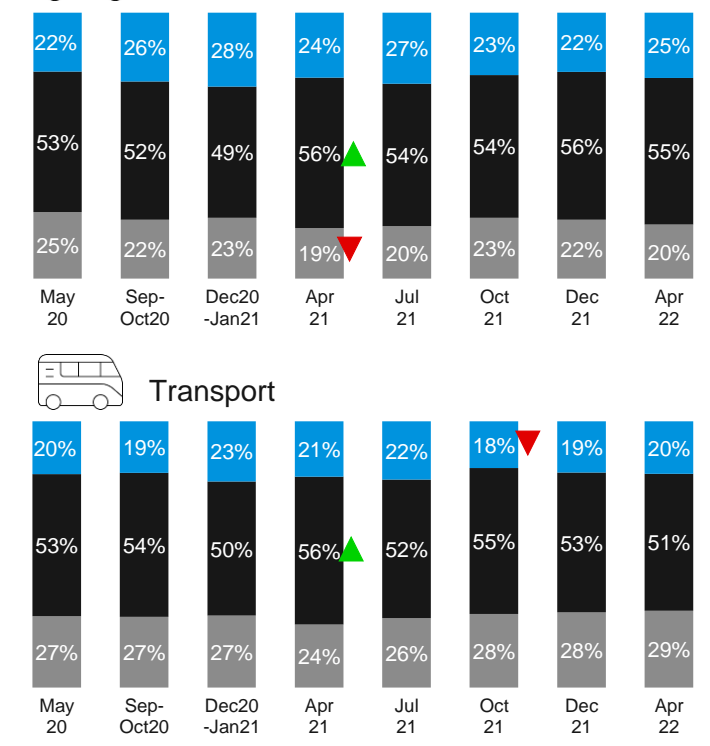
Overall value for money



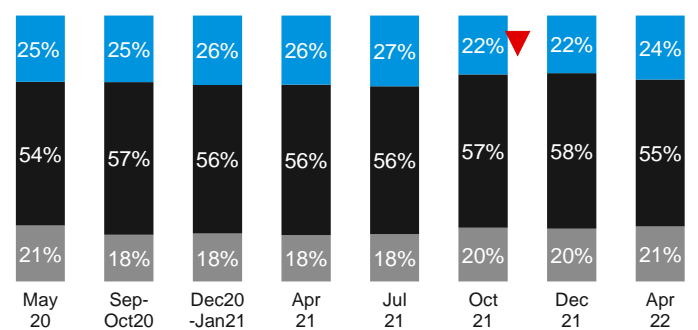
Food and drink options



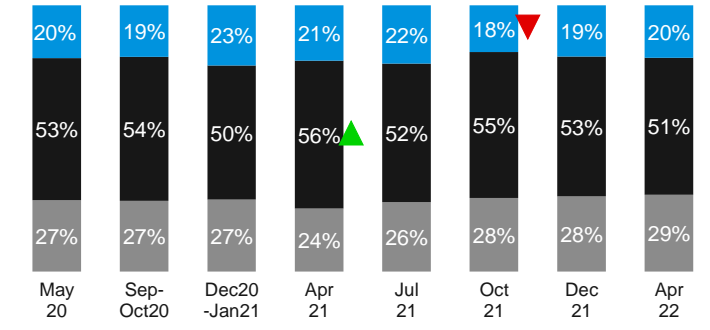
Activities



Accommodation



Transport



▲ ▼ Significantly higher / lower than previous quarter