

KANTAR

Domestic Travel View Report

Quarterly – June 2022

July 2022



Key outtakes

The demand for domestic holidays dipped in June 22, with a combination of factors likely influencing this trend

- 63% of New Zealanders plan to take a domestic holiday in the next 12 months, which is below the levels seen the same time a year ago (71%) and previous quarter (68% in April 22)
- The preference towards shorter domestic trips continues this quarter - overnight and short trips remain the preferred domestic holiday type. This could mean that New Zealanders are saving more of their annual leave for overseas trips
- With international borders now largely open, 27% of New Zealanders are looking to take an overseas holiday in the next 6 months (stable vs. April at 30%)
- Lux Adventurers and Curious Explorers are likely to take an overseas holiday sooner than other mindsets
- While the key motivation for the immediate overseas trip is still being to visit a family, the proportion of NZers who just want an overseas holiday has increased to 38% since April
- Marcomms messages need to continue to appeal to key motivations for taking a domestic holiday, which remain unchanged: needing a break, wanting to see more of New Zealand and explore new places
- Fewer consumers now think that holidays within New Zealand offer excellent value for money, especially when it comes to accommodation and transport

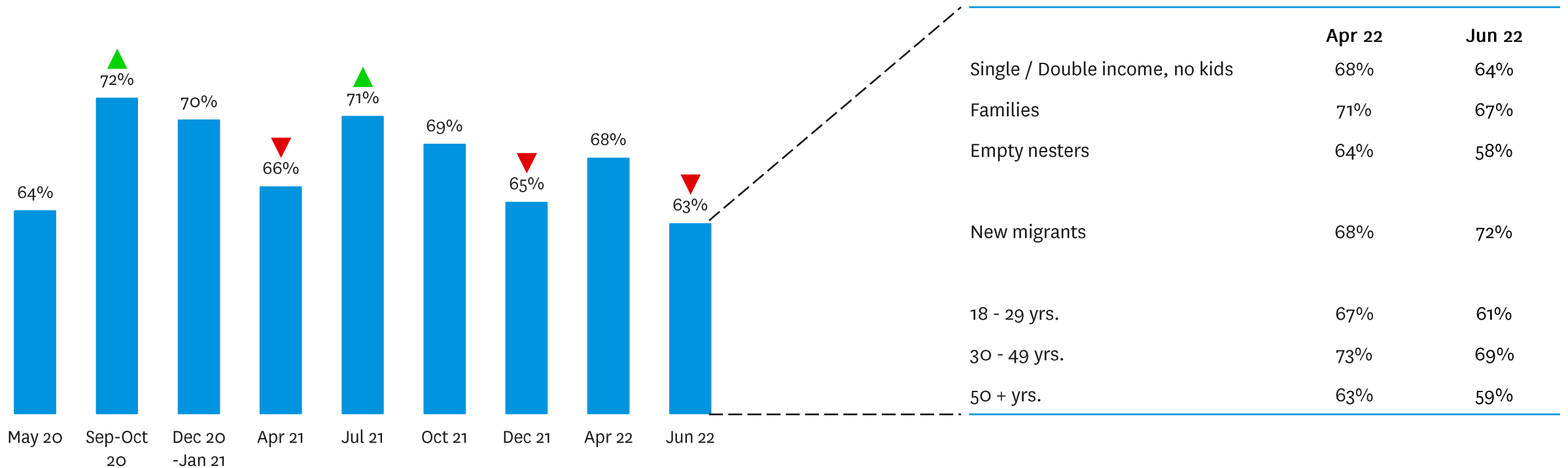
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Demand for domestic holidays



Demand for domestic holidays declined in June 22 to 63% - New migrants are the only group more likely to take a holiday within New Zealand in the next 12 months, vs last quarter

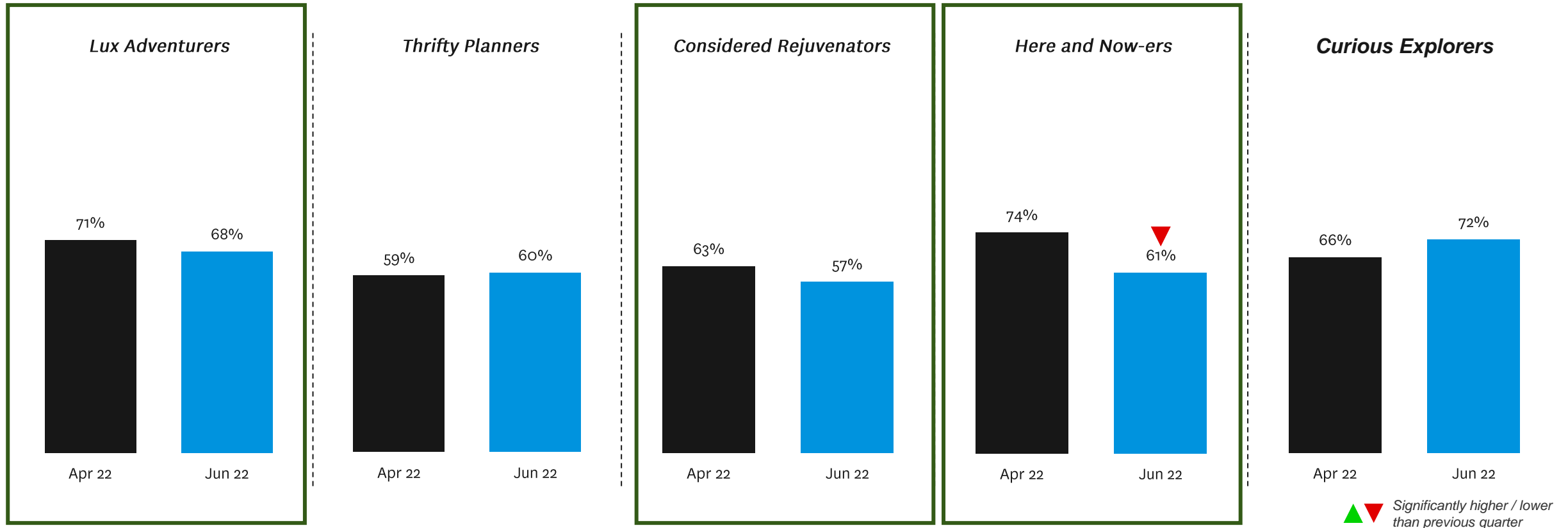
% NZers intending to holiday domestically in the next 12 months – total and by segment (% ‘Yes, planning a holiday’)



▲ ▼ Significantly higher / lower than previous quarter

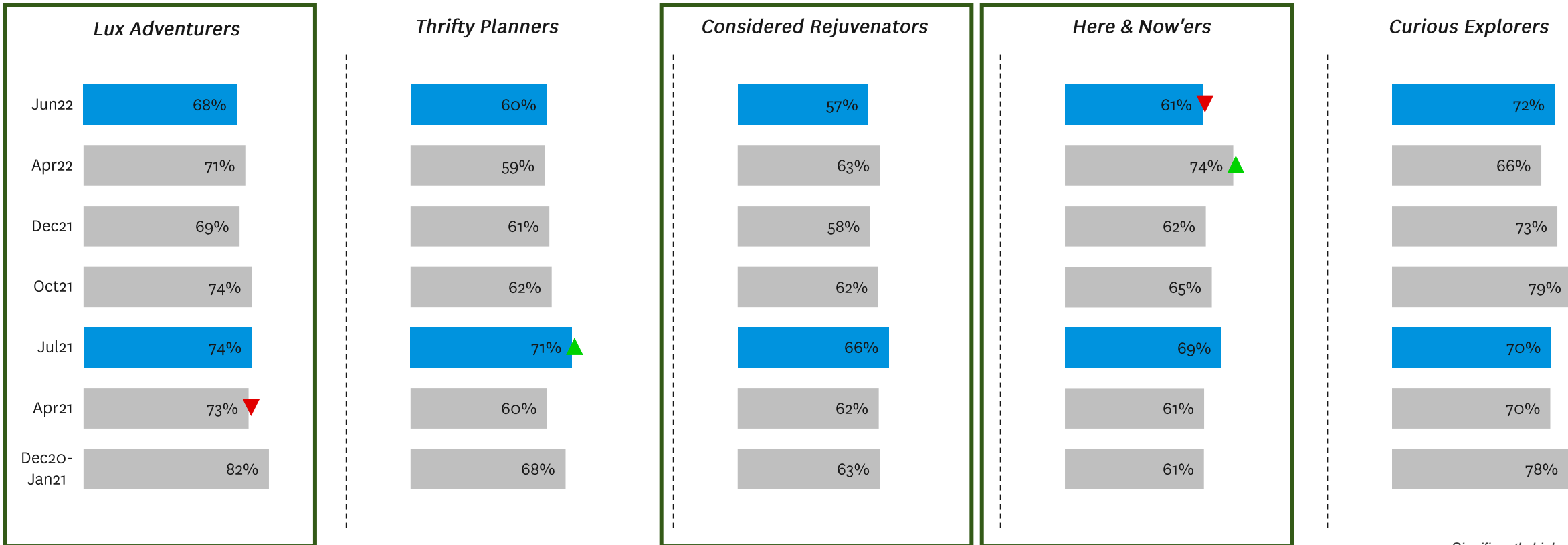
Demand for domestic holidays is the highest among the 'Lux Adventurer' mindset, and the decline since last quarter is most noticeable among the 'Here and Now-er' mindset

% NZers intending to holiday domestically in the next 12 months – by mindset (% 'Yes, planning a holiday')



Compared to the same period last year, demand for domestic holidays has dipped across all mindsets except 'Curious Explorers'

% NZers intending to holiday domestically in the next 12 months – by mindset (% 'Yes, planning a holiday')



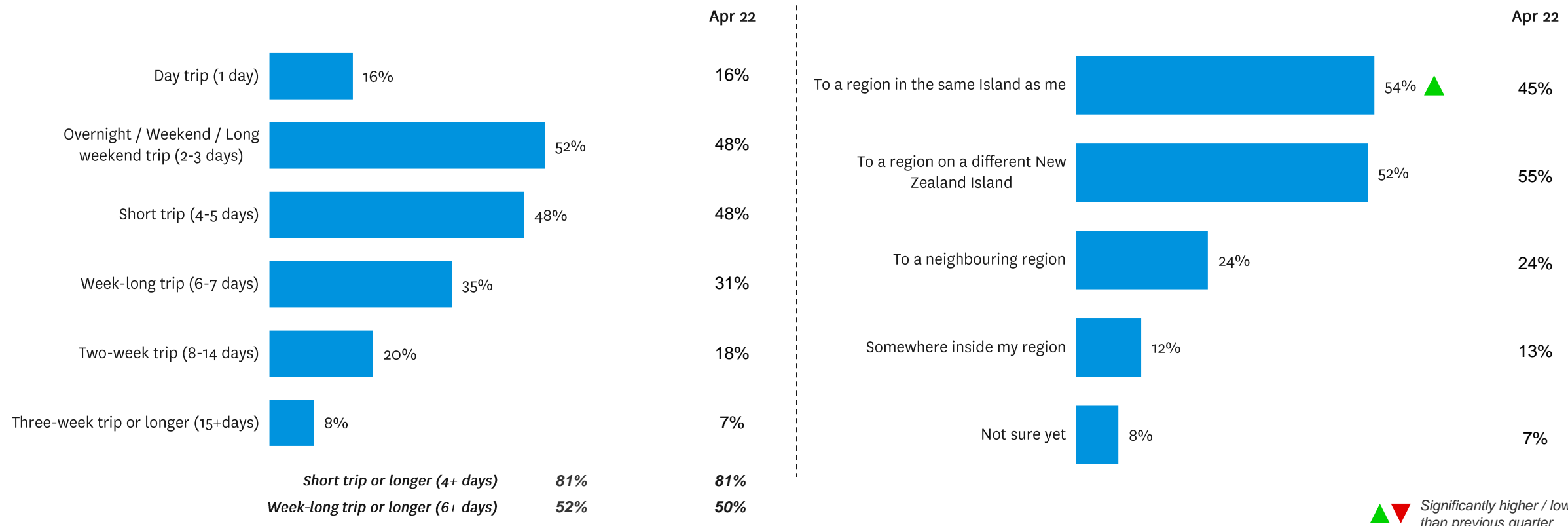
▲ ▼ Significantly higher / lower than previous quarter

Overnight and short trips remain the preferred domestic holiday type, and travelling within the same island and to another island are equally popular trip destinations

Travelling to a region in the same island has increased vs April, but is in line with the result from June 21

Where NZers want to travel for a holiday and for how long

(% NZers who will take a domestic holiday in the next 12 months, Jun 22)



▲ ▼ Significantly higher / lower than previous quarter

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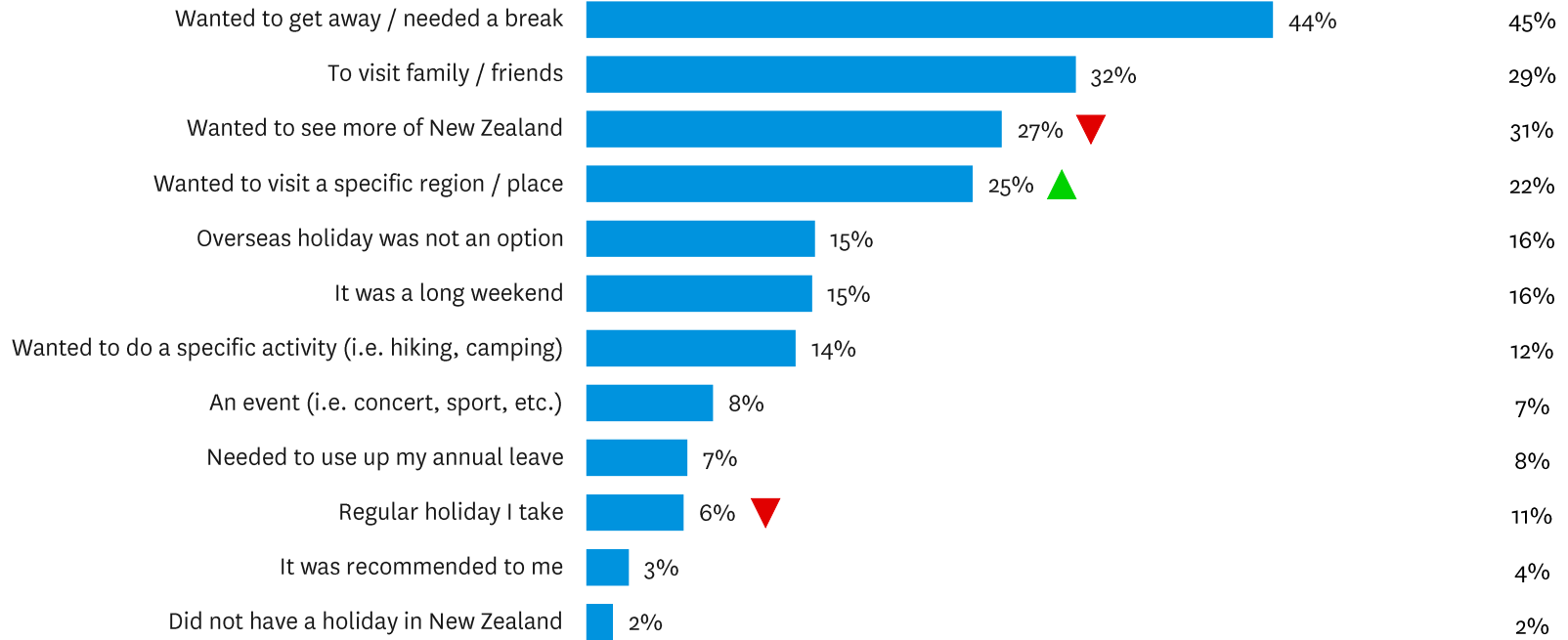
Perceptions of New Zealand holidays



The main triggers for taking domestic holiday remain the same: needing a break, visiting family / friends and wanting to see more of New Zealand

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

Apr 22



▲ ▼ Significantly higher / lower than previous quarter

When comparing between the mindsets, the key reasons to take a domestic holiday are mostly consistent

Thrifty Planners are less likely than other mindsets to travel to do a specific activity, Considered Rejuvenators are less likely to travel to see more of New Zealand

Reasons for the last holiday within New Zealand – total and by mindset (Jun 22)

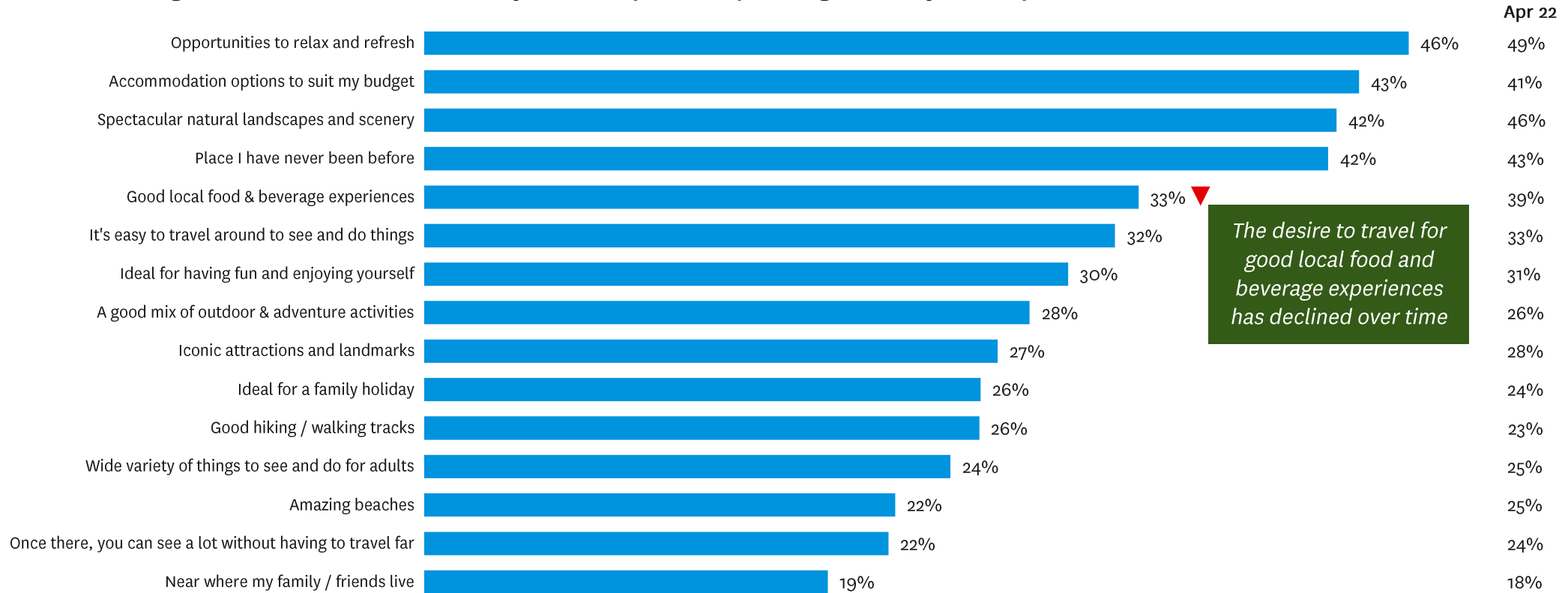


	Lux Adventurers	Thrifty Planners	Considered Rejuvenators	Here & Now-ers	Curious Explorers
Wanted to get away / needed a break	45%	41%	49%	39% ▼	51%
To visit family / friends	27% ▼	34%	35%	34%	30%
Wanted to see more of New Zealand	31% ▲	24%	18% ▼	30%	30%
Wanted to visit a specific region / place	27%	25%	27%	18% ▼	29%
Overseas holiday was not an option	13%	17%	18%	10% ▼	17%
It was a long weekend	15%	13%	12%	17%	16%
Wanted to do a specific activity (i.e. hiking, camping)	20% ▲	4% ▼	8% ▼	16%	19% ▲
An event (i.e. concert, sport, etc.)	10%	6%	8%	8%	8%
Needed to use up my annual leave	8%	5%	4%	9%	6%
Regular holiday I take	6%	8%	5%	8%	4%
It was recommended to me	4%	2%	0% ▼	6% ▲	1%
Did not have a holiday in New Zealand	2%	1%	2%	2%	3%

▲ ▼ Significantly higher / lower than other mindsets

When choosing where to holiday within New Zealand, New Zealanders continue to be motivated by opportunities to relax, spectacular landscapes and exploring new places

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



The desire to travel for good local food and beverage experiences has declined over time

▲ ▼ Significantly higher / lower than previous quarter

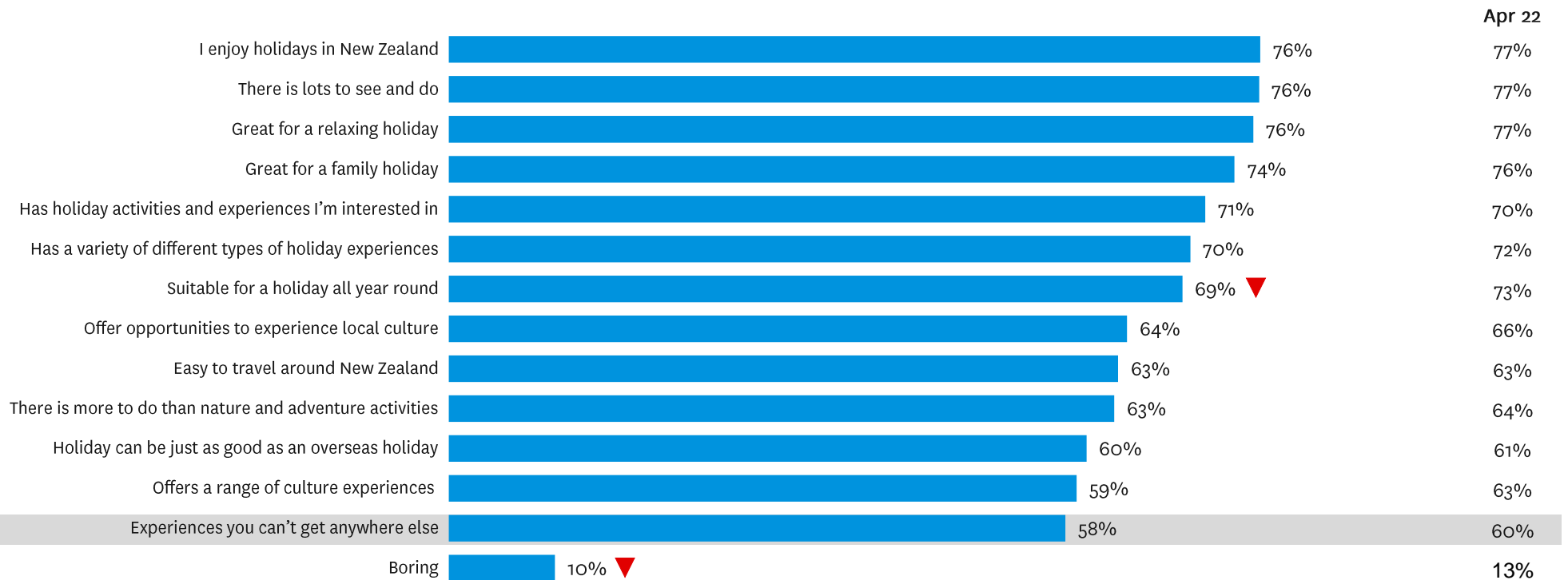
The top motivators of the domestic destination choice are similar between mindsets, though we can see differences in elements such as outdoor & adventure activities, and being ideal for a family holiday

Aspect NZers are looking for in the New Zealand holiday location – by mindset (% NZers planning a holiday, Jun 22)

	Lux Adventurers	Thrifty Planner	Considered Rejuvenators	Here & Now-ers	Curious Explorers
Opportunities to relax and refresh	44%	46%	59%	33%	50%
Accommodation options to suit my budget	42%	50%	52%	35%	40%
Spectacular natural landscapes and scenery	43%	46%	35%	38%	52%
Place I have never been before	51%	43%	33%	32%	48%
Good local food & beverage experiences	35%	43%	35%	21%	32%
It's easy to travel around to see and do things	28%	43%	40%	23%	31%
Ideal for having fun and enjoying yourself	32%	26%	31%	31%	28%
A good mix of outdoor & adventure activities	37%	22%	13%	29%	34%
Iconic attractions and landmarks	31%	24%	24%	24%	27%
Ideal for a family holiday	27%	41%	24%	20%	16%
Good hiking / walking tracks	34%	16%	18%	22%	35%
Wide variety of things to see and do for adults	28%	18%	28%	19%	25%
Amazing beaches	23%	20%	19%	22%	25%
Once there, you can see a lot without having to travel far	19%	26%	27%	16%	24%
Near where my family / friends live	16%	25%	16%	19%	20%

Core perceptions of New Zealand holidays have been stable compared to April 22, with most New Zealanders seeing domestic holidays as providing enjoyment, relaxation and family-focus

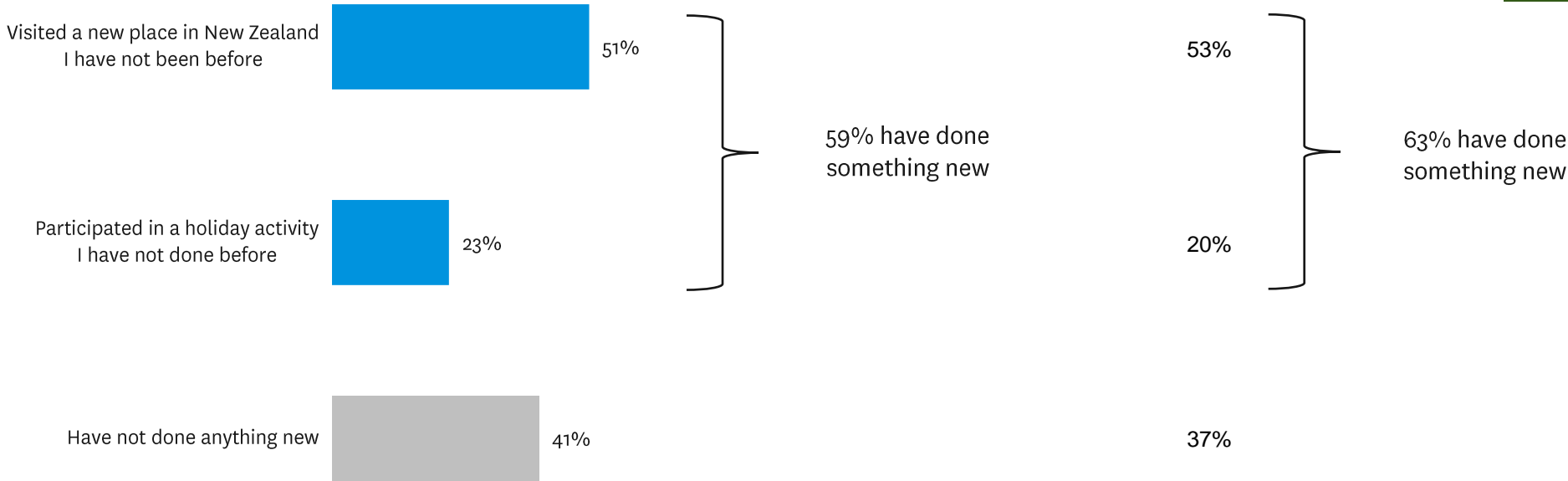
Perceptions of New Zealand holidays (% All NZers who agree with the statement, Jun 22)



▲ ▼ Significantly higher / lower than previous quarter

6 in 10 New Zealanders say that they have done something new or visited a new place in New Zealand in the last 12 months, which is unchanged since April

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



Lux Adventurers are the most likely mindset to have been somewhere or done something new in the last 12 months

▲ ▼ Significantly higher / lower than previous quarter

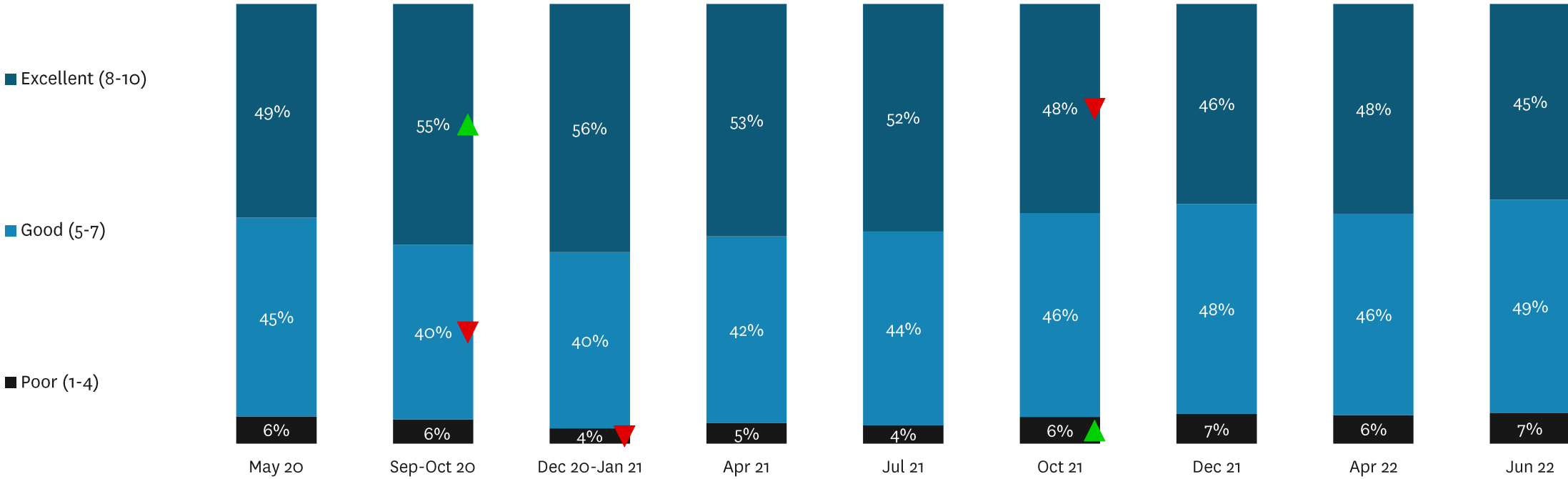
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New Zealand holiday experience



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

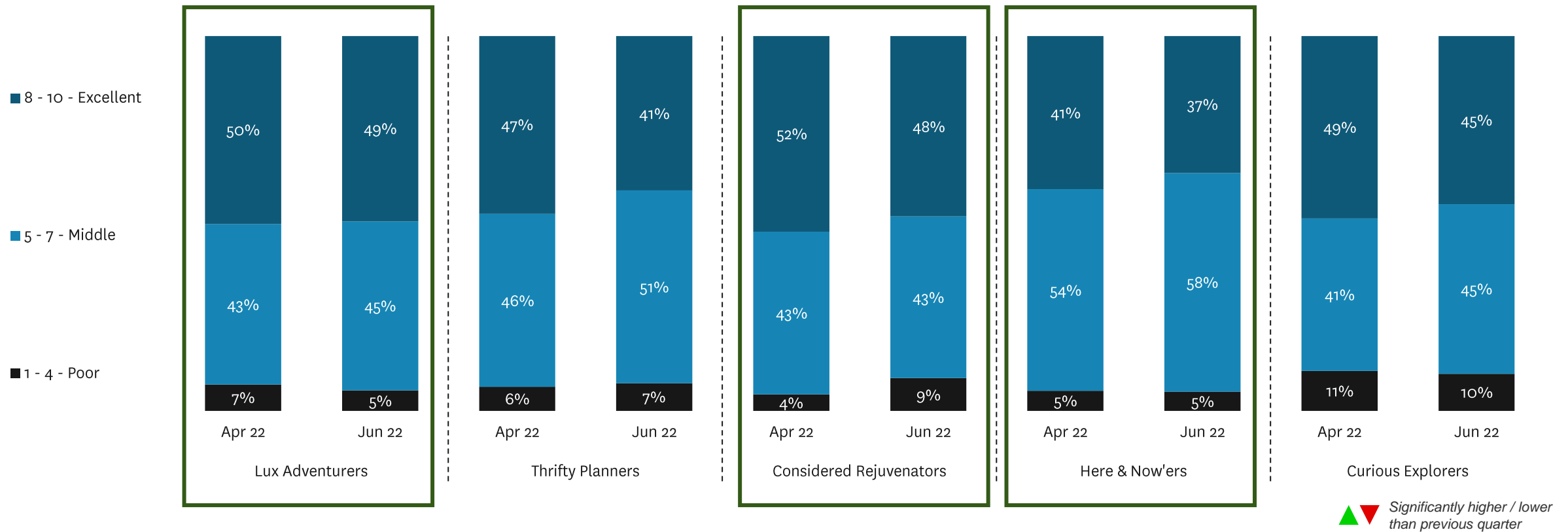
How well New Zealand delivers to expectations as a holiday destination (% All NZers)



▲ ▼ Significantly higher / lower than previous quarter

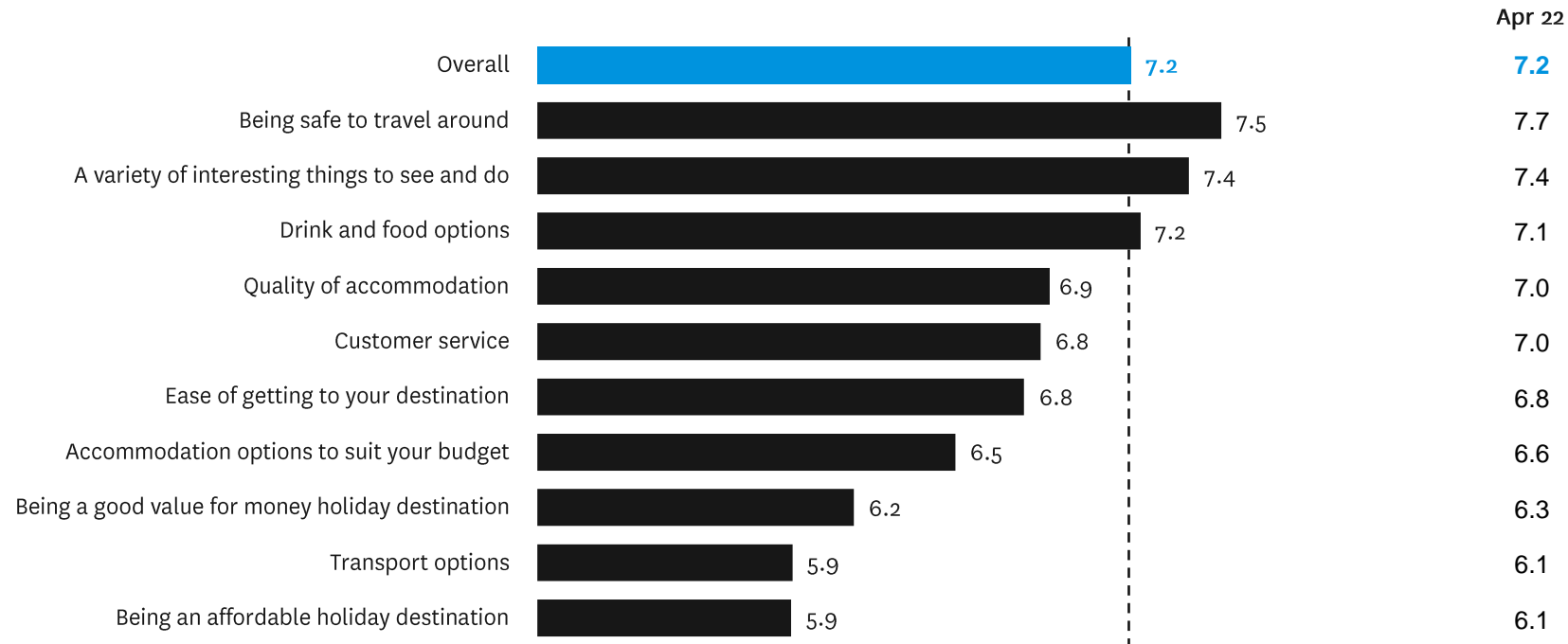
Perceptions of how well New Zealand holidays delivery to expectations are stable across mindsets, with the highest scores coming from the 'Lux Adventurer' and 'Considered' Rejuvenator mindsets

How well New Zealand delivers to expectations as a holiday destination – by mindset



Perceptions of how well New Zealand delivers on domestic holidays is stable compared to April, with several metrics seeing slight drops and 'food and drink options' increasing marginally

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

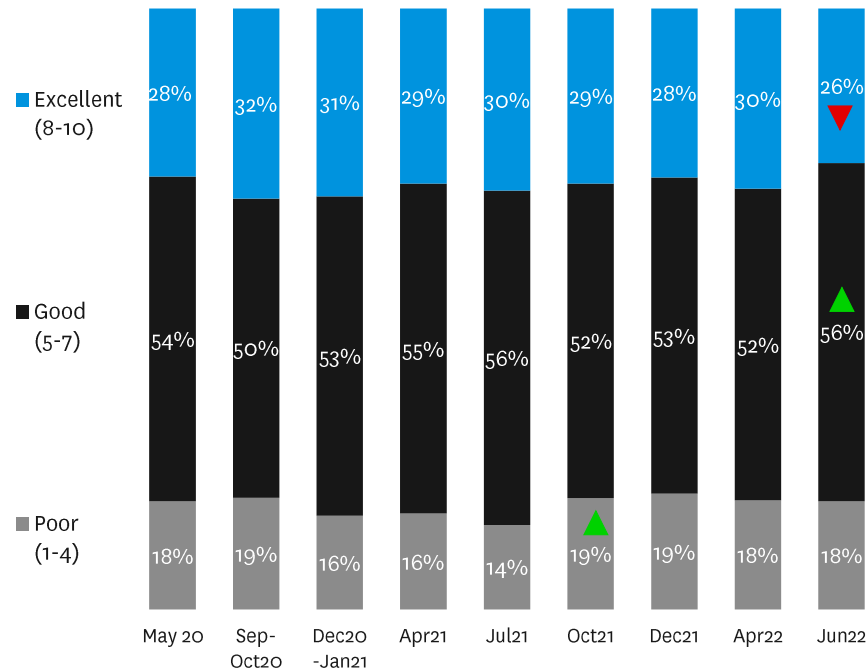


▲ ▼ Significantly higher / lower than previous quarter

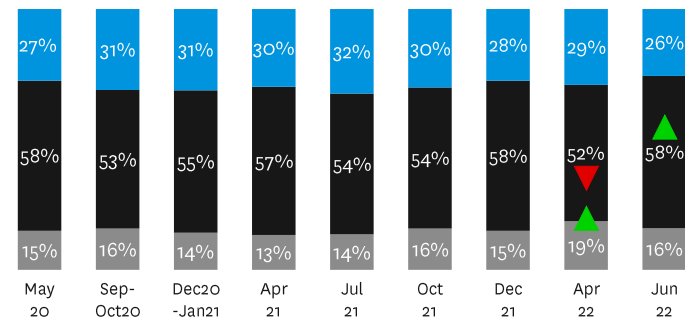
Over time, there has been a decline in the proportion of New Zealanders who think that domestic holidays offer excellent value for money, especially when it comes to accommodation and transport

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

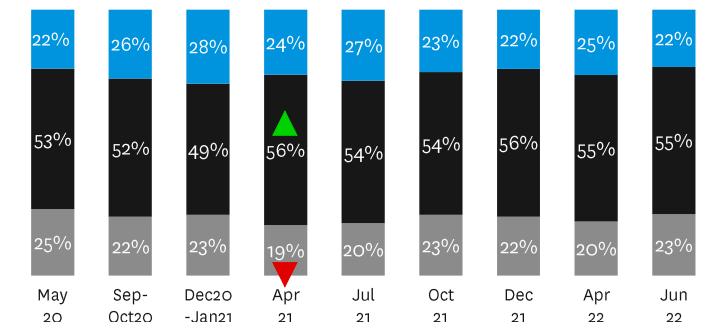
Overall value for money



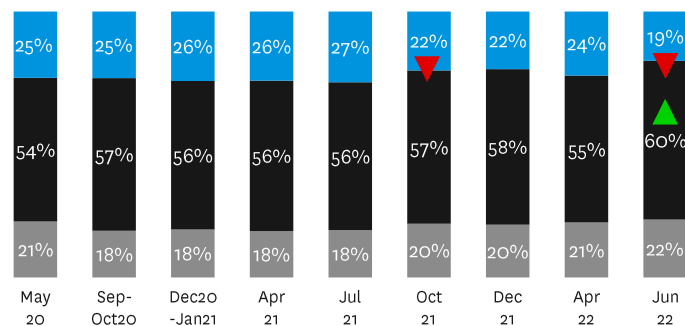
Food and drink options



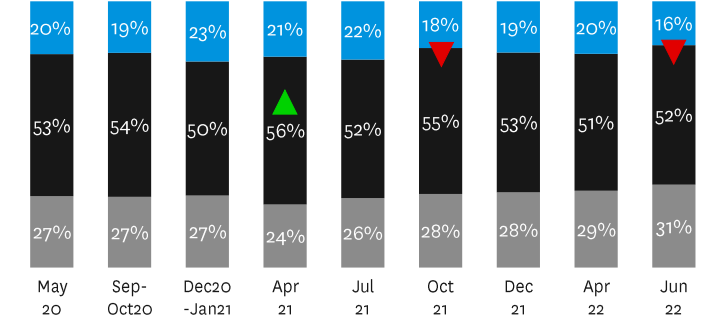
Activities



Accommodation



Transport

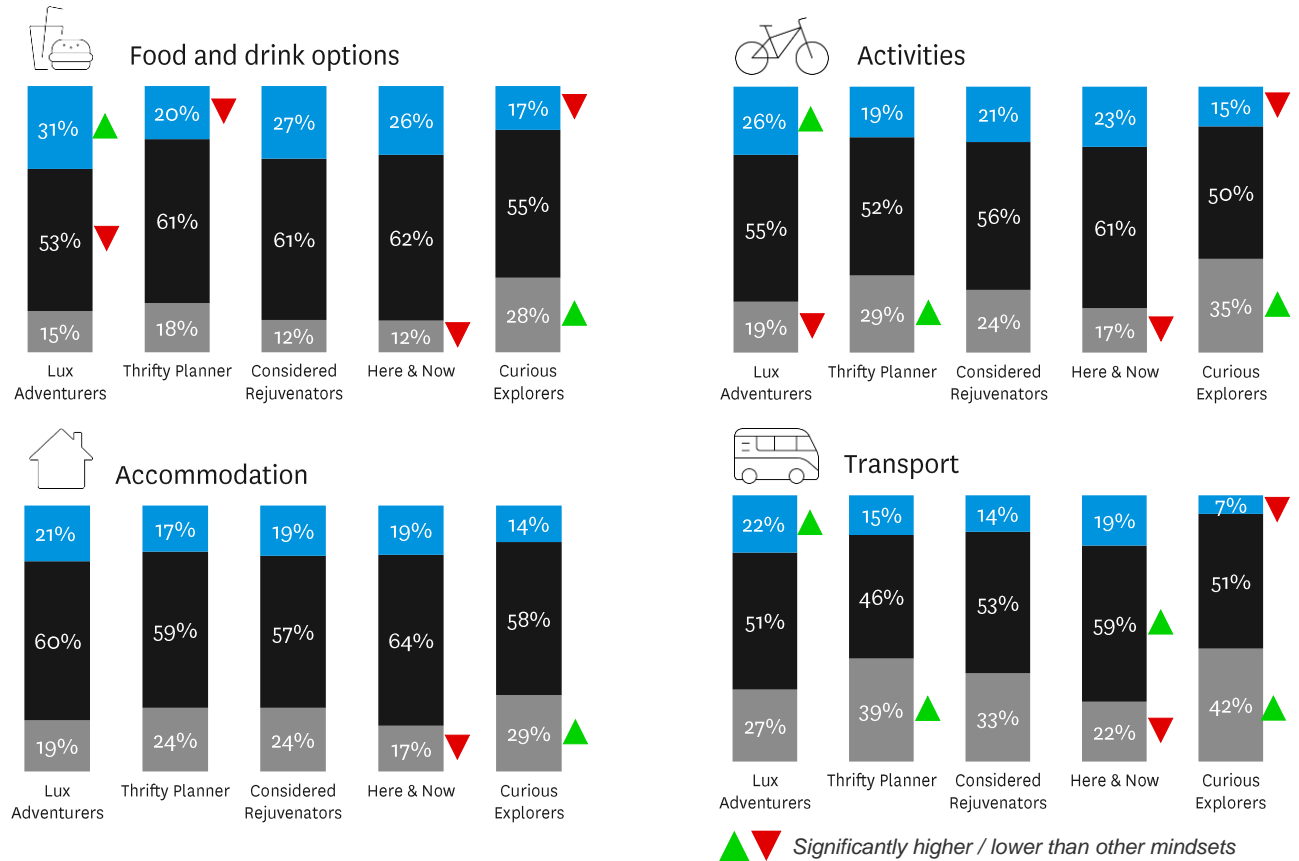
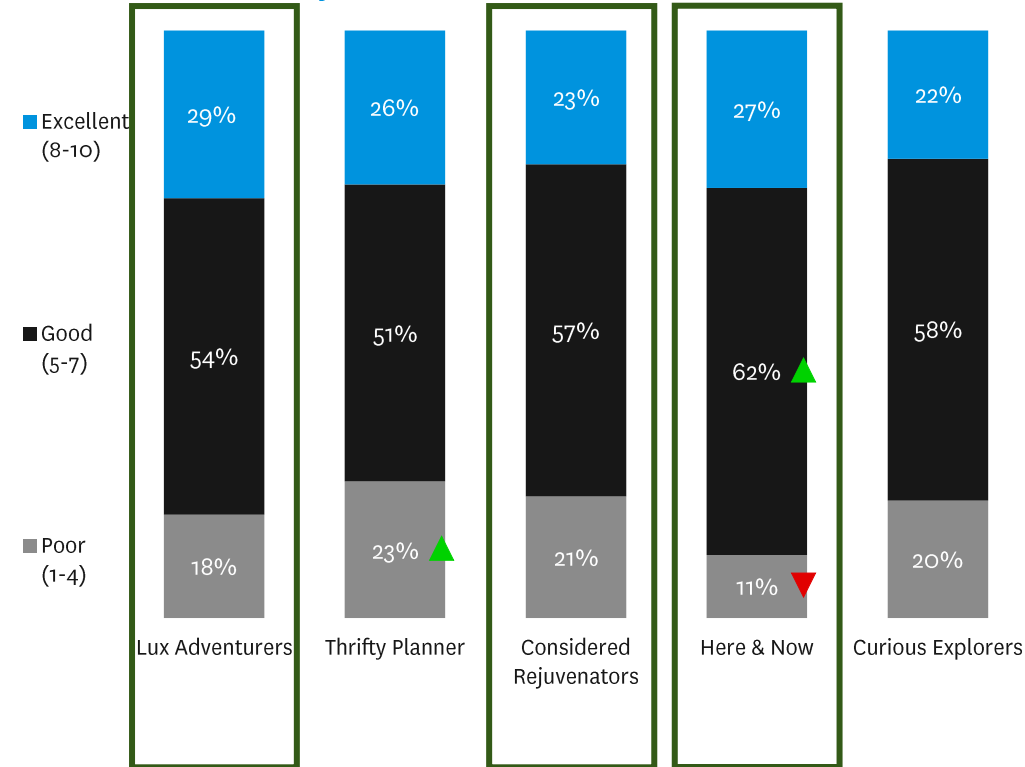


▲ ▼ Significantly higher / lower than previous quarter

Perceptions of value for money of the domestic holidays are lower among 'Curious Explorers' and 'Thrifty planners' compared to other mindsets

Perceptions value for money of holidays within New Zealand (% All NZers, Jun 22)

Overall value for money



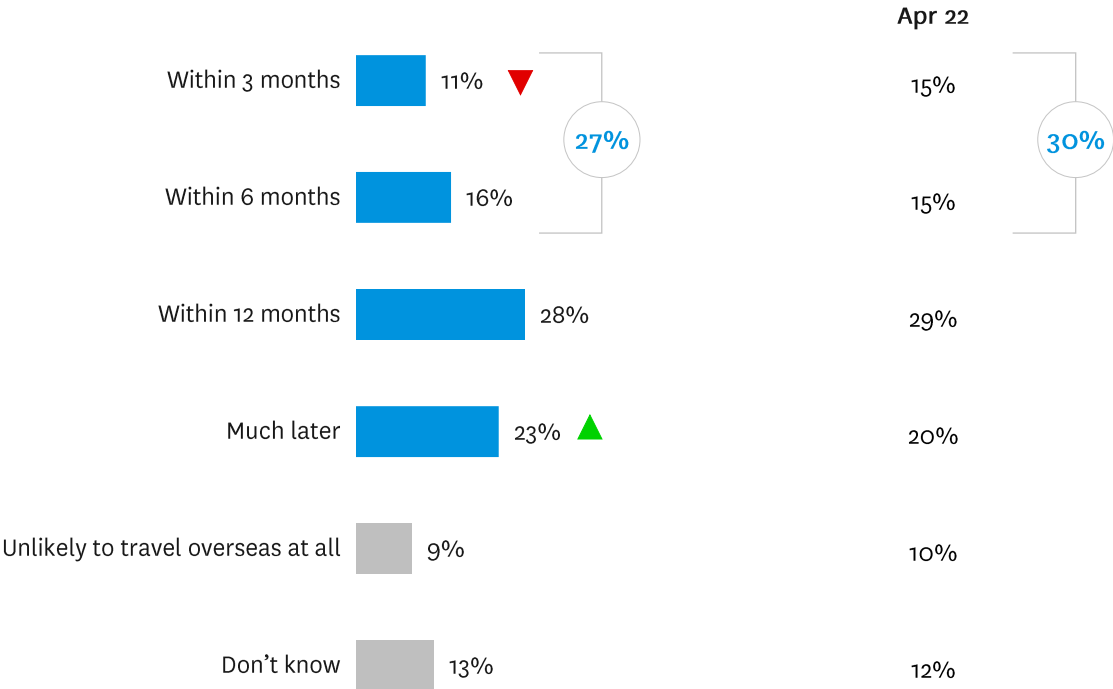
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Overseas travel plans



With travel restrictions easing up globally, we see around half of New Zealanders looking to travel overseas within a year, though some of the urgency to travel has dropped off compared to April

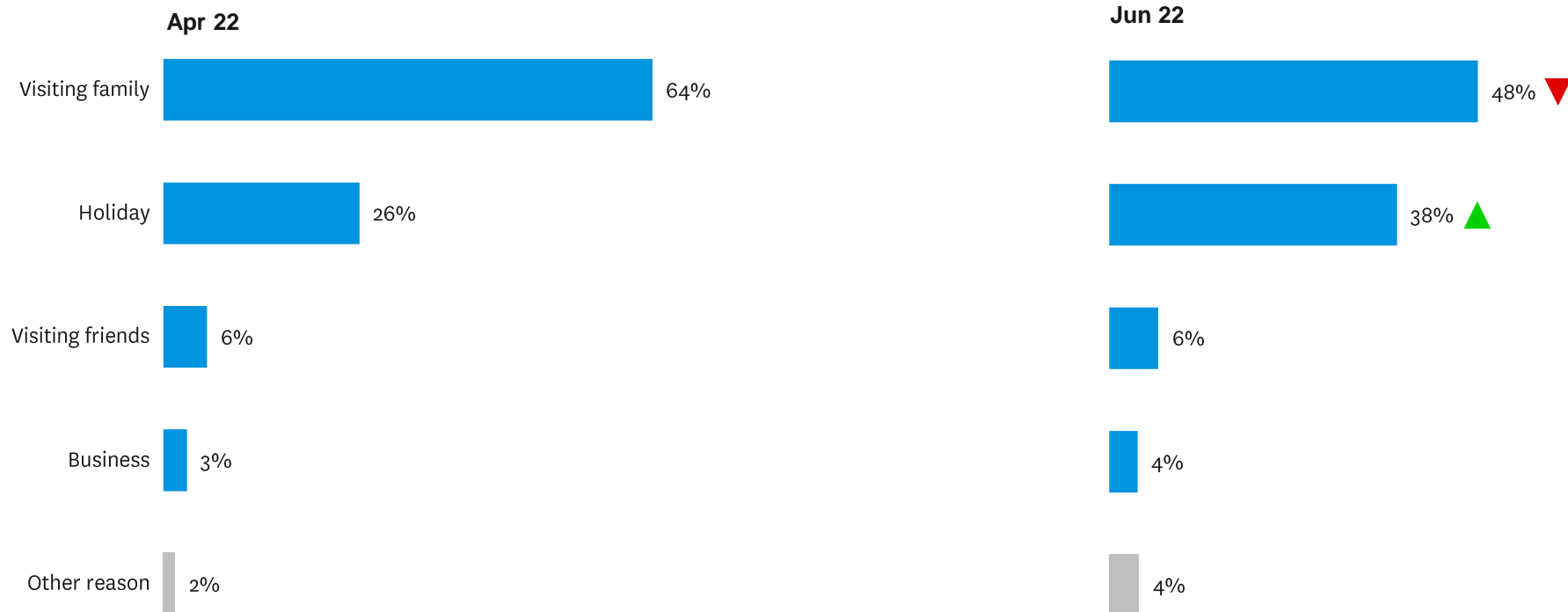
How soon NZers intend to travel for overseas holiday (% All NZers, Jun 22)



▲ ▼ Significantly higher / lower than previous quarter

While the main reason for an overseas trip is still to visit family, it is significantly lower this quarter as more NZers just want a holiday. This may be due to much of the 'visiting family' holidays already having taken place

Main reason for first overseas trip in the next 6 months (% All NZers)

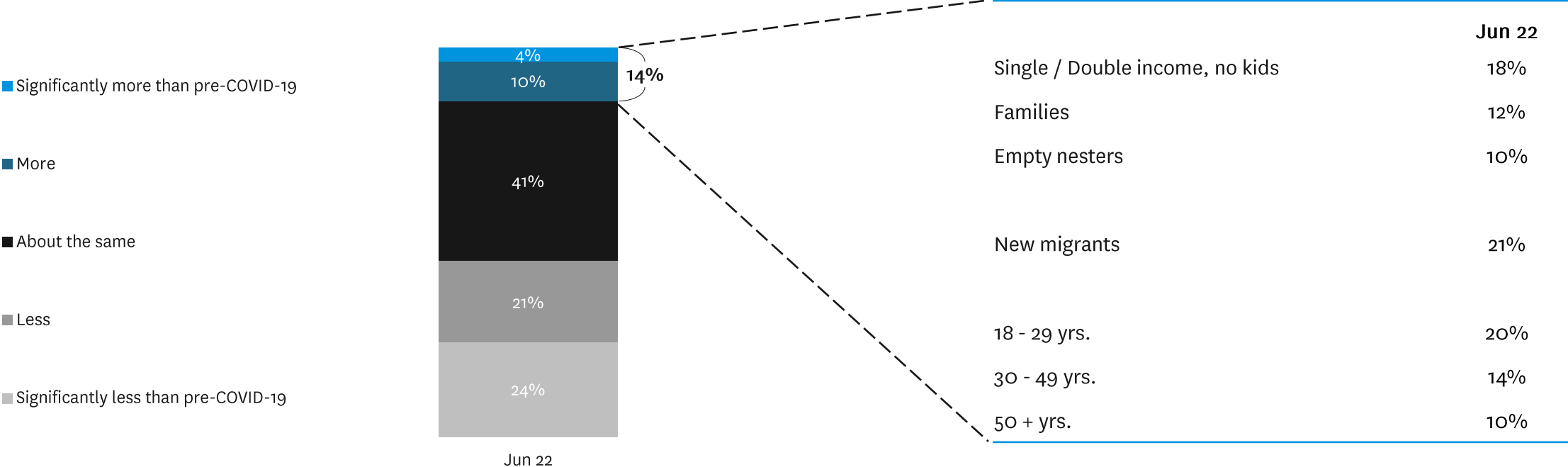


The Curious Explorer mindset is the only mindset more likely to take an overseas trip for a holiday, rather than to visit family

▲ ▼ Significantly higher / lower than previous quarter

Only a small proportion of New Zealanders are looking to spend more on overseas holidays than they were on before COVID-19; the youngest travellers are most likely to be willing to spend more

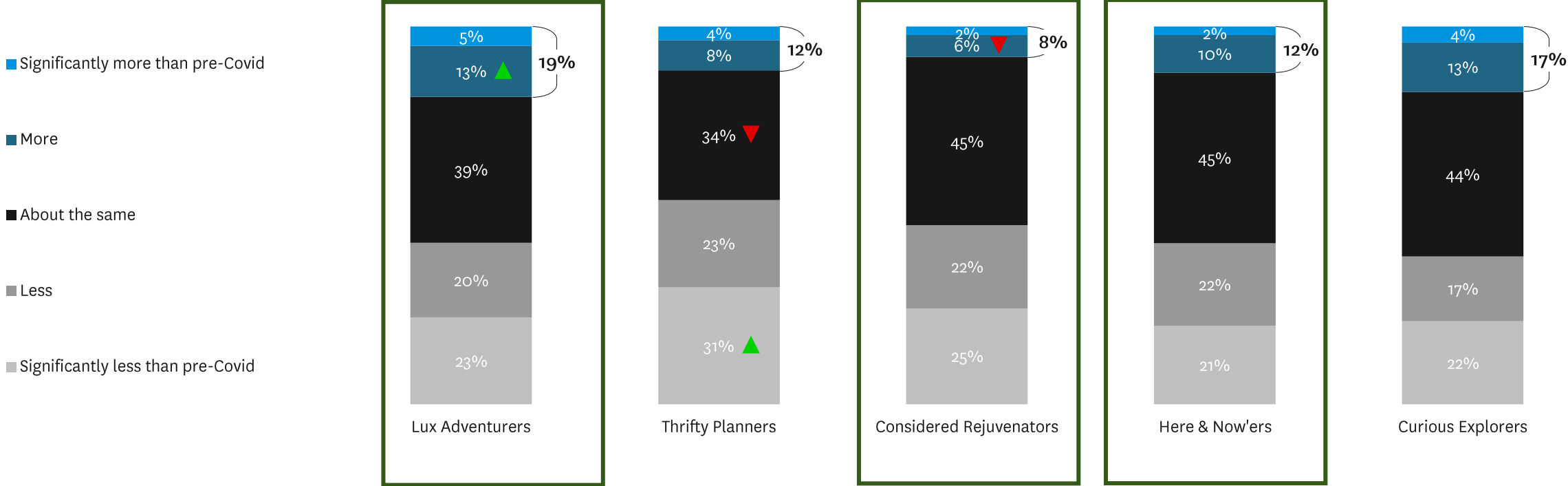
How much NZers plan to spend on overseas holidays – total and by segment (% NZers who will take a domestic holiday in the next 12 months)



Lux Adventurers and Curious Explorers are the mindsets most likely to spend more on overseas holidays than they did pre-COVID-19 (18% and 17%)

As expected, the Lux travellers are willing to spend more on overseas holidays, followed closely by the Curious Explorers

How much NZers plan to spend on overseas holidays – by mindset (% NZers who will take a domestic holiday in the next 12 months)



▲ ▼ Top 2 significantly higher / lower than other mindsets

Appendix

Research methodology and sample



Deep dive (Jun 22)



Total sample

1200



Survey length (max)

15 min

Jun 22 Deep Dive fieldwork period |
2nd June – 20th June 2022

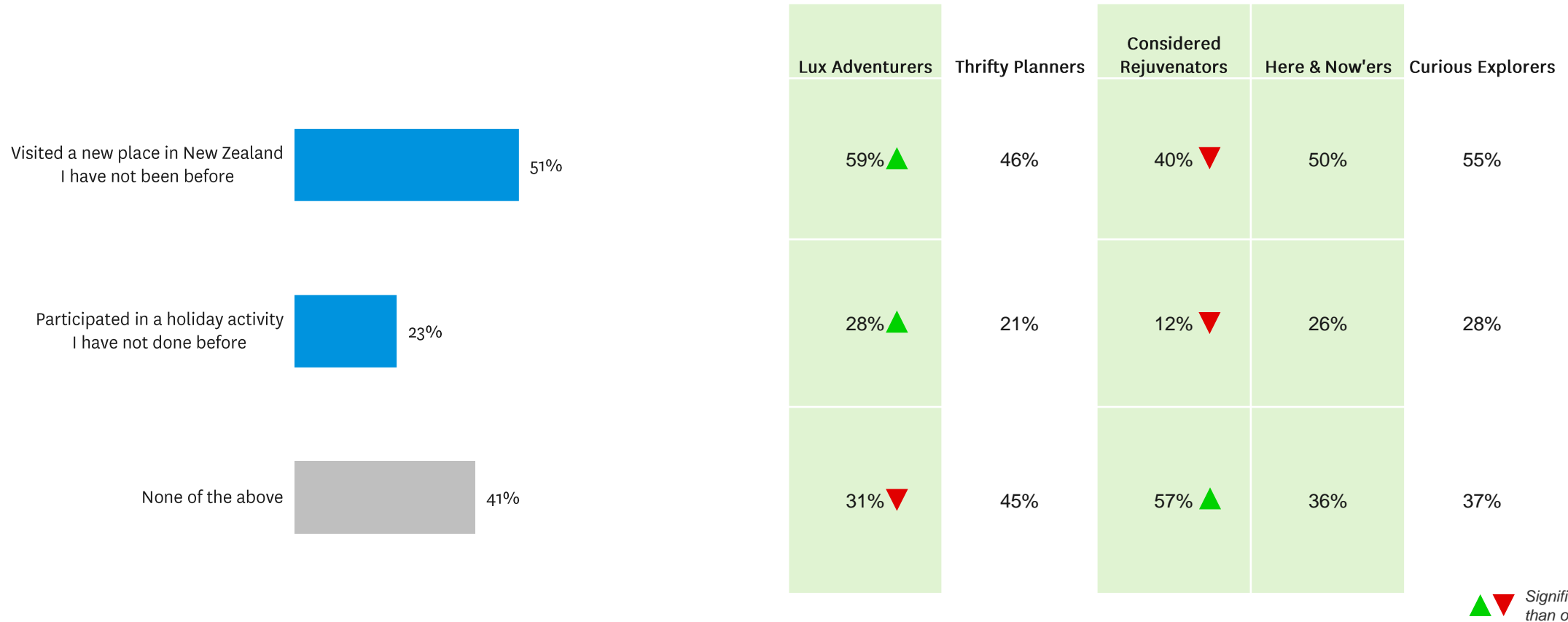


Sample

	Jun 22
Auckland	415
Waikato	114
Bay of Plenty	54
Gisborne	19
Hawke's Bay	69
Taranaki	29
Manawatu-Wanganui	46
Wellington	131
Tasman	15
Nelson	17
Marlborough	13
West Coast	9
Canterbury	156
Otago	62
Southland	14
Northland	37
Total	1200

Lux Adventurers are more likely to have done something new around New Zealand in the last 12 months compared to Considered Rejuvenators

Have you done any of the following in the last 12 months – total and by mindset (Jun 22)



The main reason for an overseas trip is to visit family among all mindsets, with the exception of Curious Explorers who are more likely to just want a holiday

Main reason for first overseas trip in the next 6 months - by mindset (Jun 22)

