

KANTAR

Domestic Travel View Report

Quarterly – October 2022



Key insights

What is the size of the opportunity with the domestic market?

- Sizeable opportunity to drive domestic holidays: 71% of New Zealanders plan a domestic holiday in the next 12 months (up from Jun 22), and 44% of them have already committed with booking some parts of their holiday
- There is a more immediate opportunity to drive domestic holiday participation, as 44% of New Zealanders are planning to travel over the Christmas / New Year period
- Long weekends and short breaks remain the most popular way to experience New Zealand

How can TNZ drive demand for domestic holidays?

- There is an opportunity for the 'If You Seek' brand platform to continue to reignite New Zealanders' curiosity and stimulate domestic demand
- Marcomms messages need to appeal to the key drivers of domestic holidays: relaxation, ease of domestic travel, options to suit various budgets, food and beverage experiences, and opportunities to explore new places
- Perceptions of New Zealand holidays have strengthened further on a number of aspects, however, there is still job to be done to drive perceptions of uniqueness of New Zealand holiday experiences

How does New Zealand deliver to holiday experiences?

- Perceptions of how well New Zealand holidays deliver to expectations are strong and have improved in Oct 22
- There have been noticeable improvements in all aspects of domestic holiday experience, however issues with affordability persist and are also the main reason why New Zealanders hesitate to take domestic holidays
- Thus, it's important to deliver to a strong value proposition around uniqueness of domestic holiday offer, and opportunities for exploration and discovery

1

What is the size of the opportunity with the domestic market?

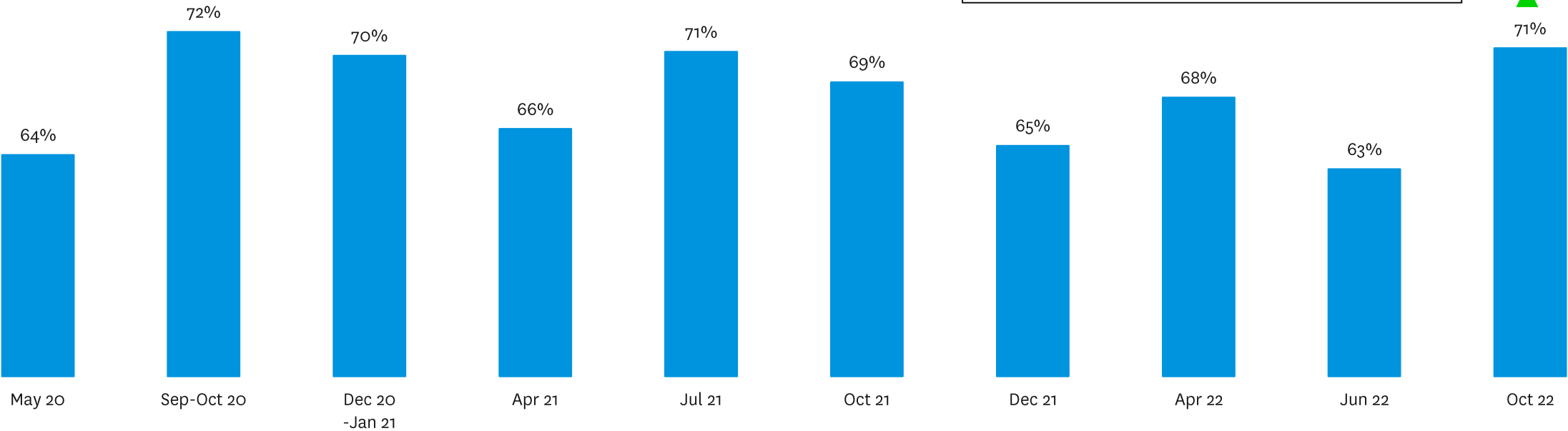




Demand for domestic holidays has jumped back to a strong 71%, setting up for a strong summer holiday season

% NZers intending to holiday domestically in the next 12 months

Demand has increased among:

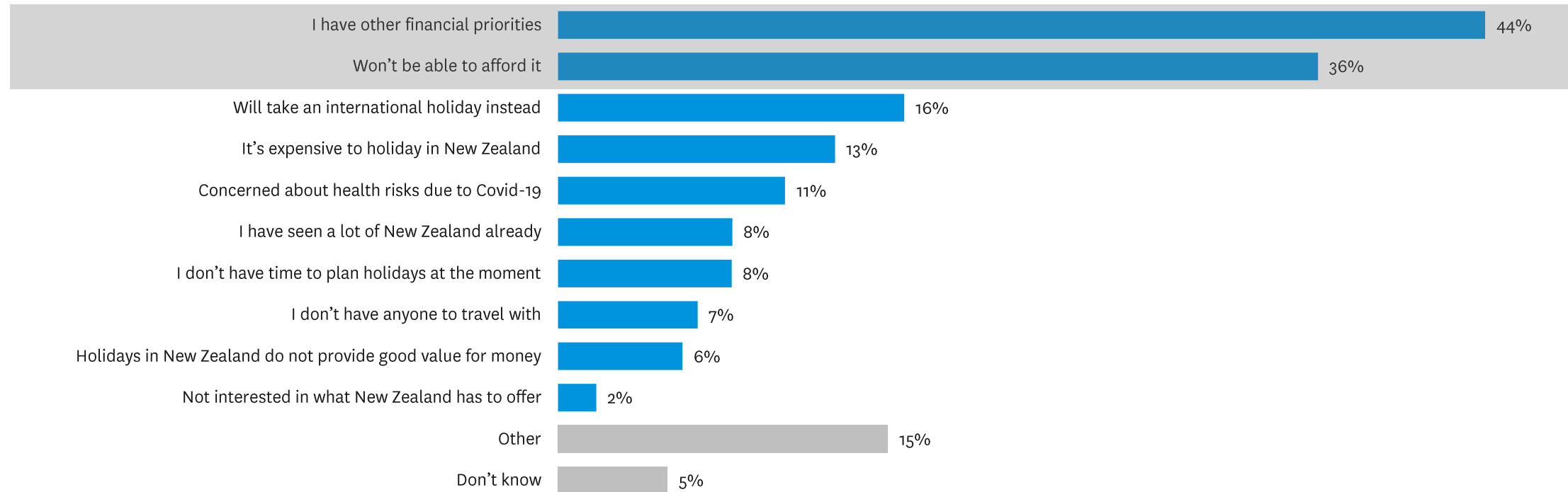
- SINKs / DINKs
- Empty Nesters
- Under 30 yrs. olds
- Lux Adventurers & Here & Now-ers



  Significantly higher / lower than Jun 22

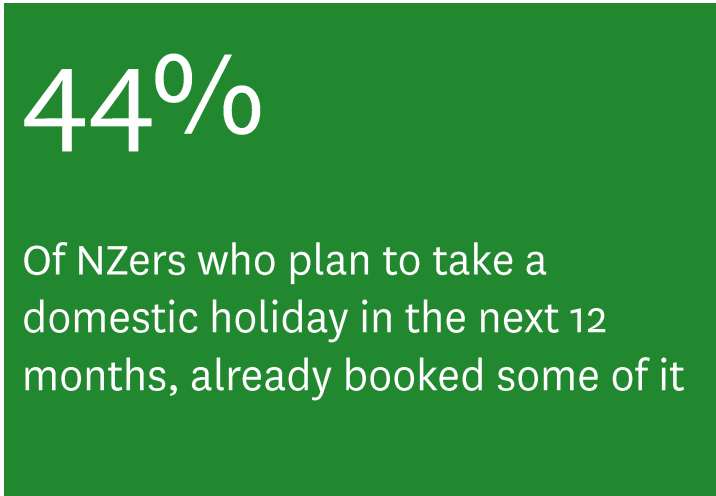
Affordability is the key barrier to taking a domestic holiday in the next 12 months

Reasons for not planning to take a New Zealand holiday (% who do not plan to take a domestic holiday in next 12 months, Oct 22)

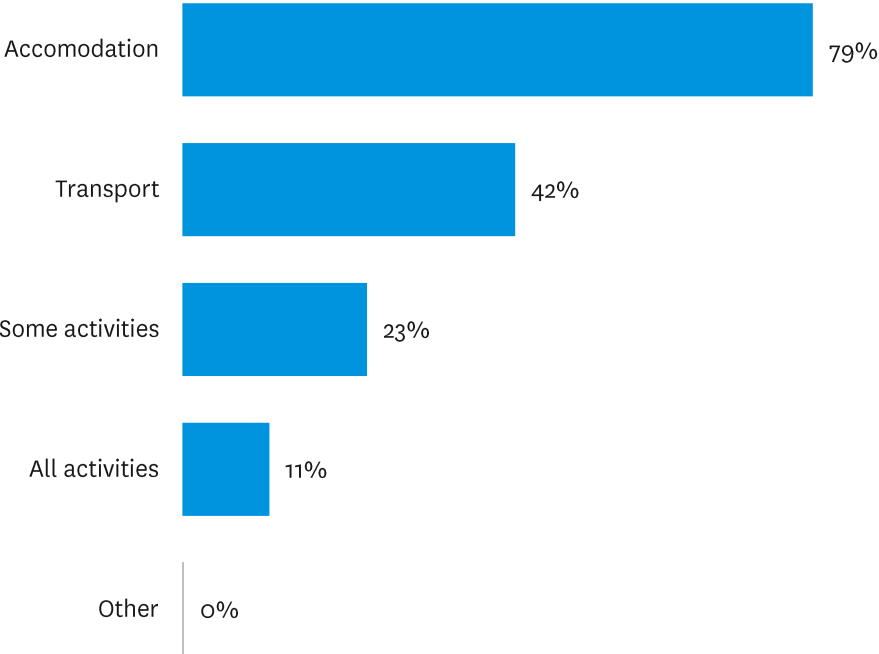


There is a solid holiday pipeline: 44% of NZers who are planning to take a holiday have already committed to it by booking accommodation and / or transport

Elements of New Zealand holiday already booked (% All NZers who booked a holiday, Oct 22)

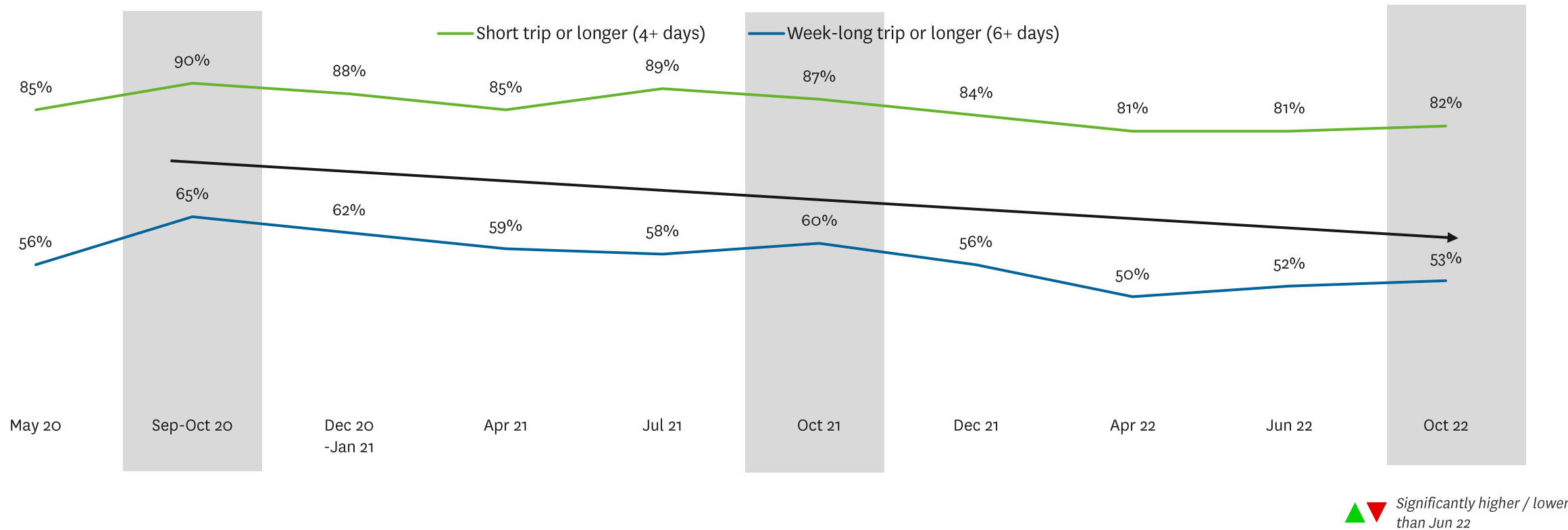


Among these 44% ...



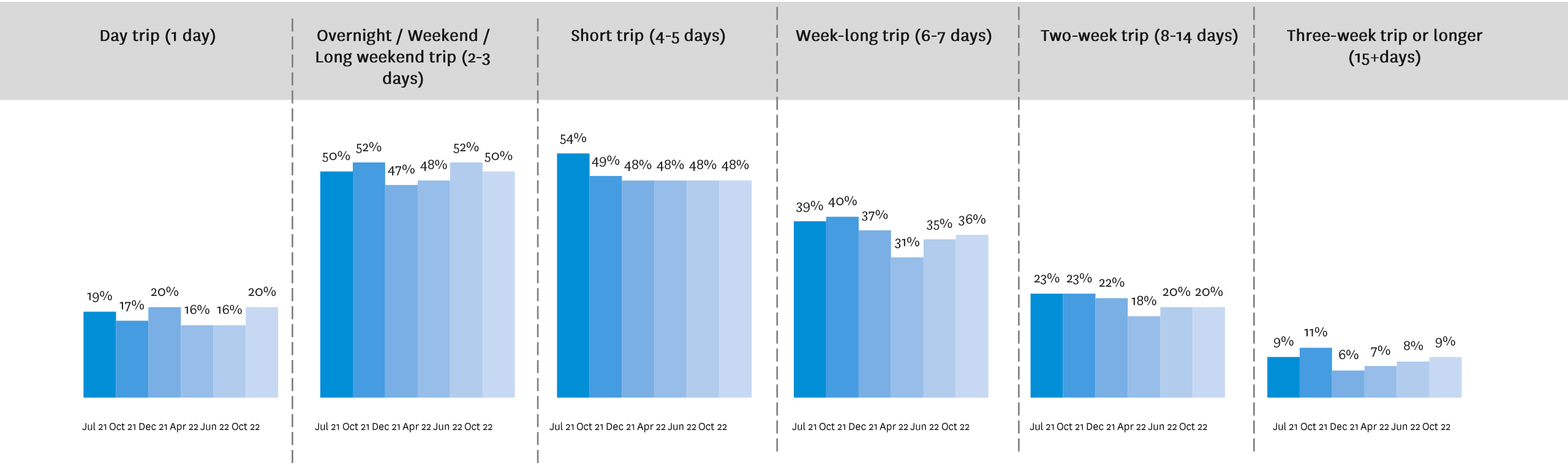
The demand for long (6+ days) domestic holidays has weakened as NZers are getting back into their overseas trips

Length of holiday NZers are looking to take in the next 12 months (% All NZers)



Long weekends and short breaks remain the most popular way to experience New Zealand

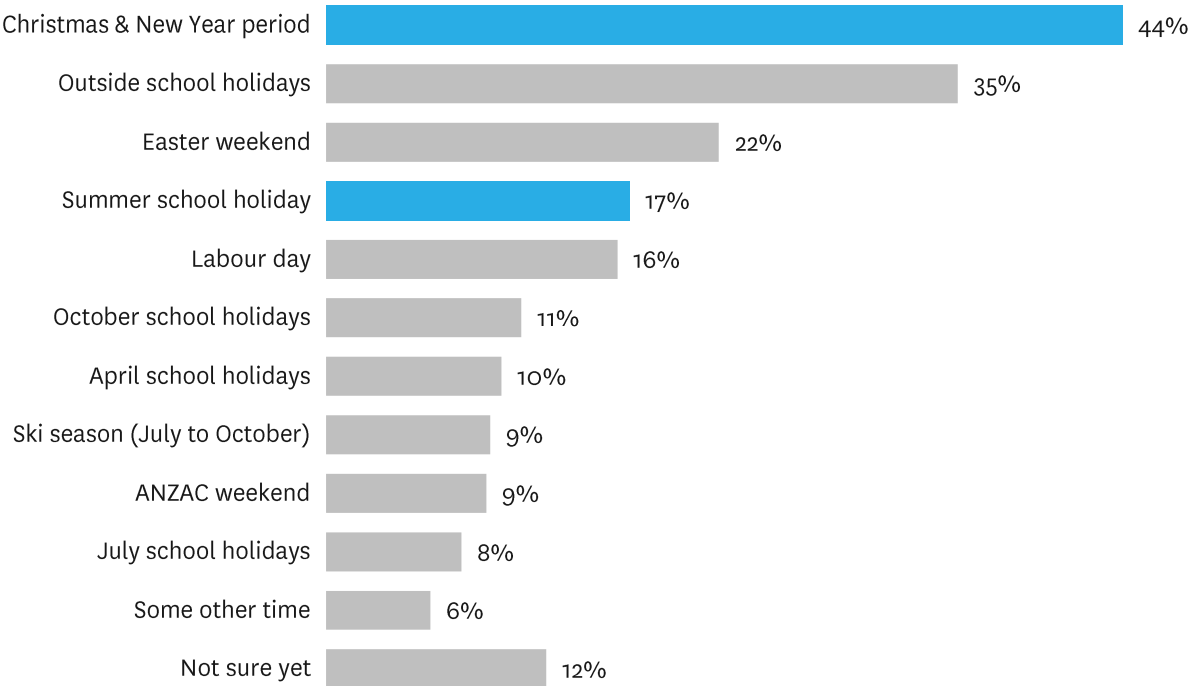
Length of holiday NZers are looking to take in the next 12 months (% All NZers)



▲ ▼ Significantly higher / lower than Jun 22

Strong demand for a domestic holiday this Summer 22 / 23 indicates an immediate opportunity for TNZ to drive domestic holiday participation

When NZers are likely to travel within New Zealand for a holiday in the next 12 months (% All NZers, Oct 22)

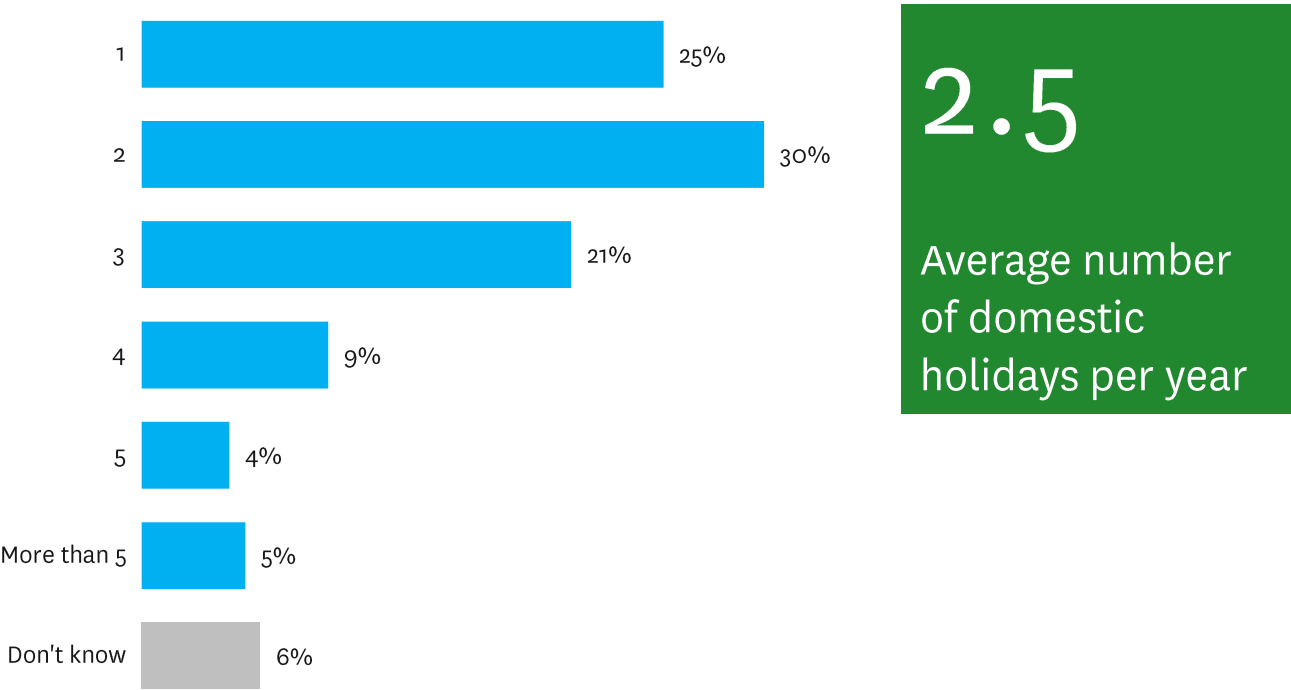


	Christmas & New Year period	Summer school holiday
Lux Adventurers	48%	21% ▲
Thrifty Planners	45%	12%
Considered Rejuvenators	42%	17%
Here & Now-ers	39%	18%
Curious Explorers	48%	10% ▼

▲ ▼ Significantly higher / lower than other mindsets

Most New Zealanders take between one and three domestic holidays per year

Number of domestic holidays NZers typically take in a year (% All NZers, Oct 22)



	Up to 2 holidays a year	More than 2 holidays a year
Lux Adventurers	60%	40%
Thrifty Planners	63%	37%
Considered Rejuvenators	61%	39%
Here & Now-ers	52%	48%
Curious Explorers	55%	45%

Here & Now-ers and Curious Explorers on average take more holidays per year than other mindsets

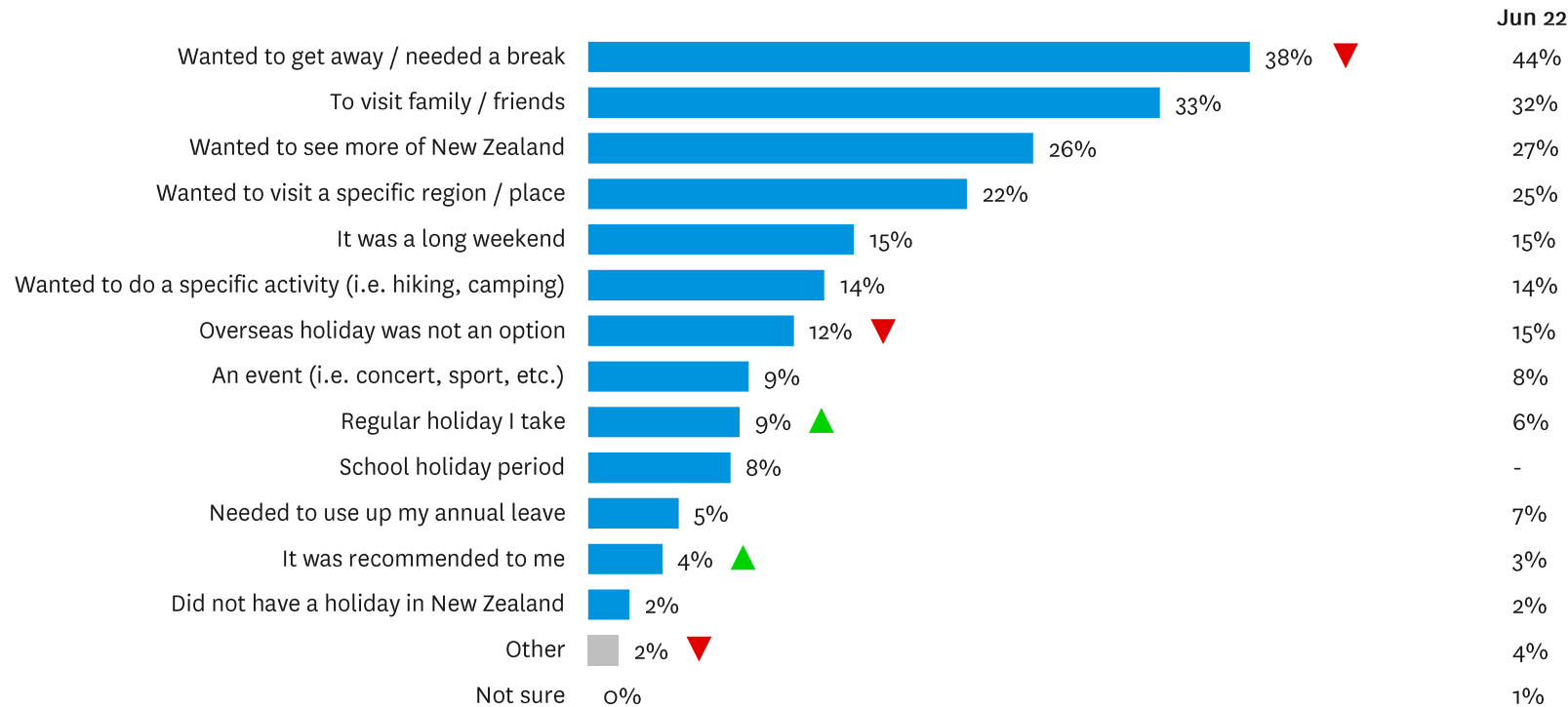
2

How can TNZ drive demand for domestic holidays?



The key triggers of domestic holidays are enduring: needing a break, wanting to visit family / friends, and wanting to see more of New Zealand

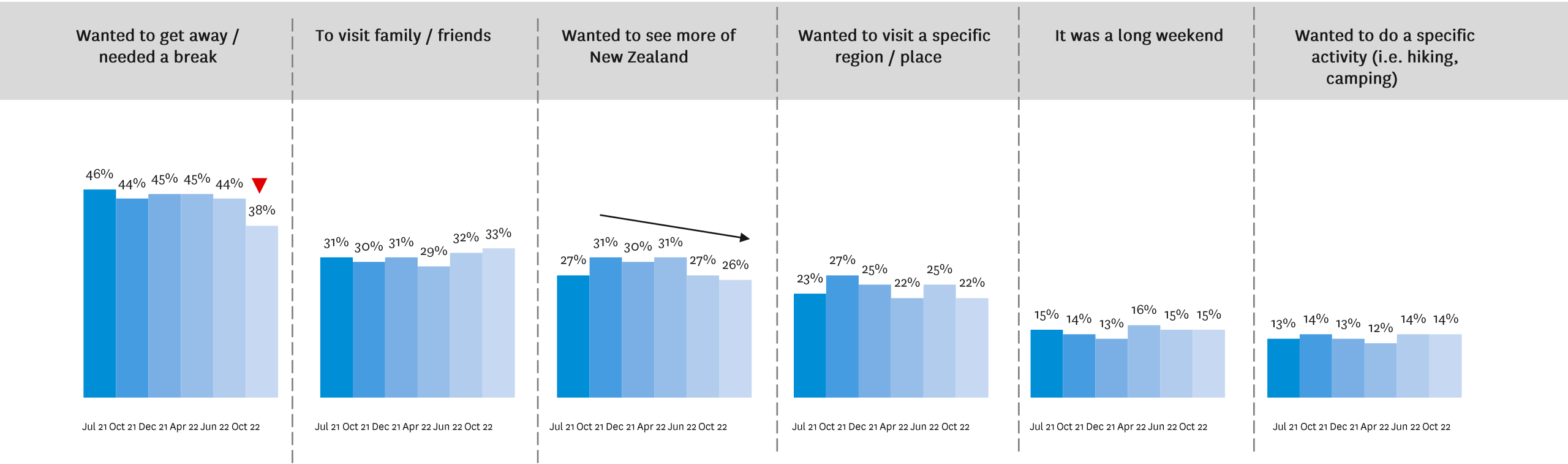
Reasons for the last holiday within New Zealand (% All NZers, Oct 22)



▲ ▼ Significantly higher / lower than Jun 22

Desire to see more of New Zealand has softened over last year, indicating an opportunity for the ‘If You Seek’ brand platform to reignite New Zealander’s curiosity

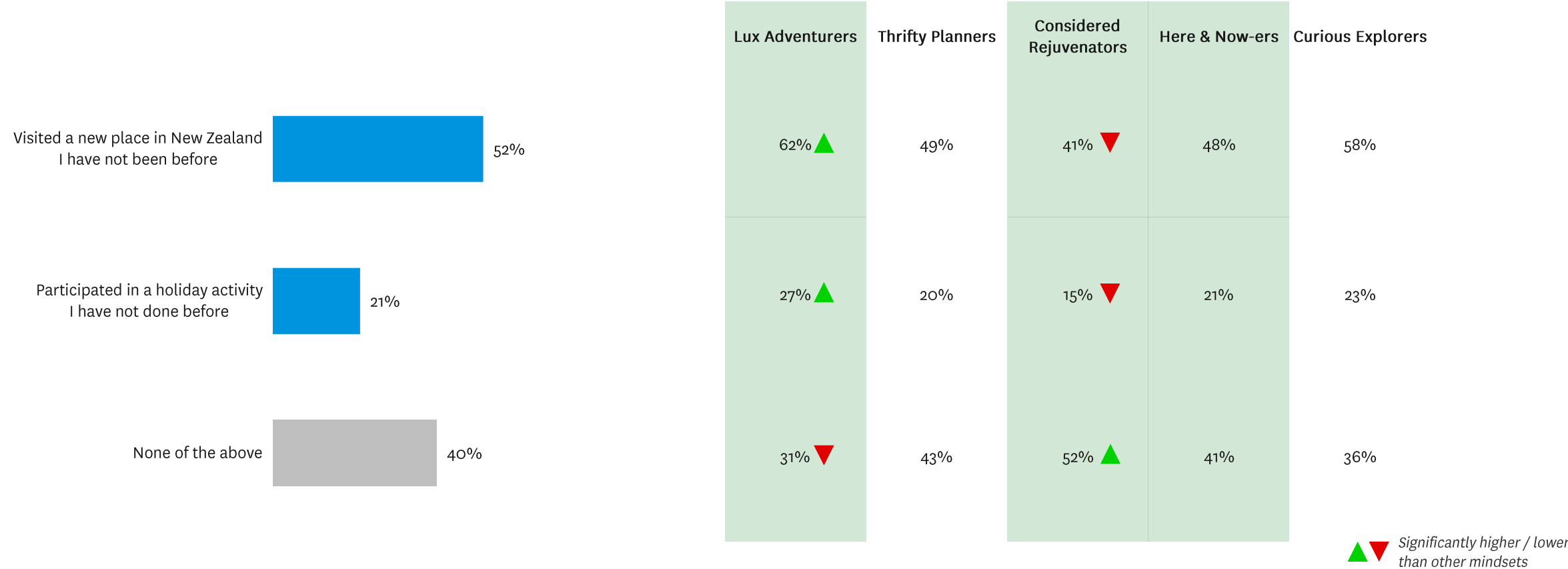
Top 6 reasons for the last holiday within New Zealand over time (% All NZers)



▲ ▼ Significantly higher / lower than Jun 22

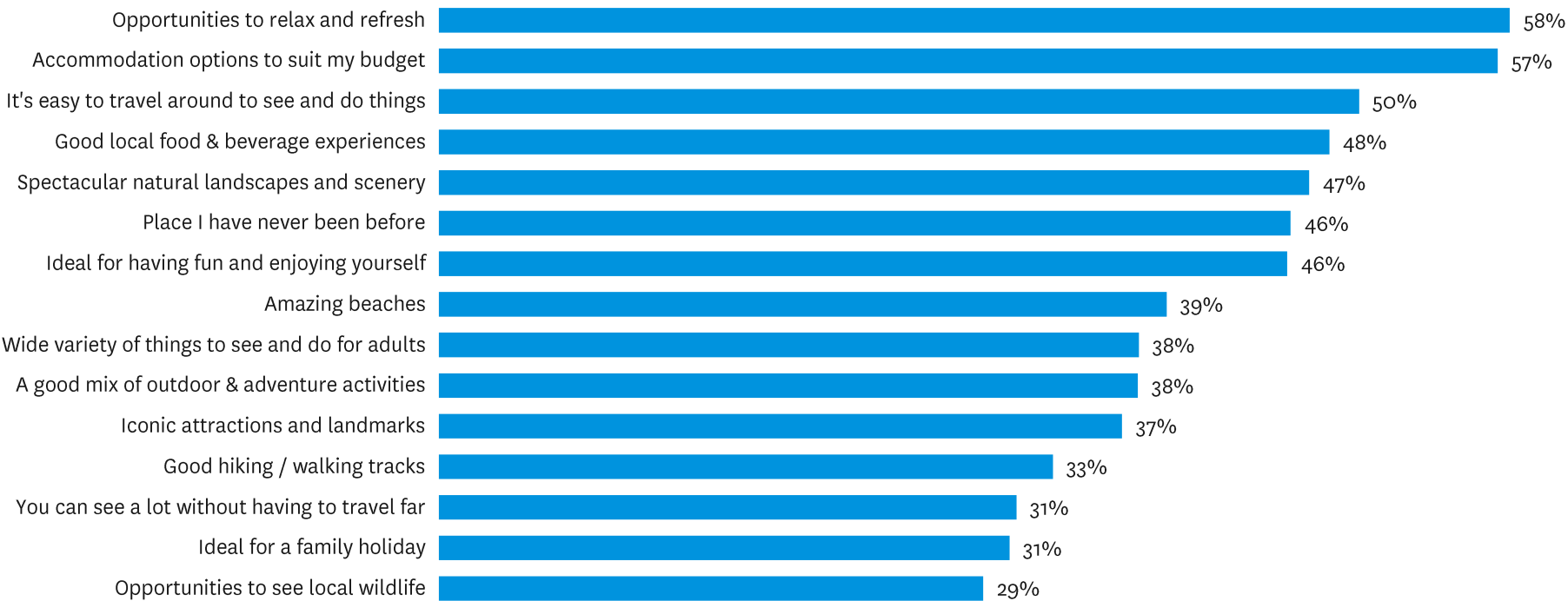
In particular, there is an opportunity to drive exploration among Here & Now-ers who lag other priority mindsets in doing something new around New Zealand

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



Messages from TNZ need to appeal to the key drivers of domestic holidays: relaxation, ease of domestic travel, options to suit various budgets, food & beverage experiences, and opportunities to explore new places

Factors that are important to NZers when deciding to take next holiday (% NZers planning a holiday, Oct 22)



Note: comparisons with prev. waves are not available for this question due to change in question wording

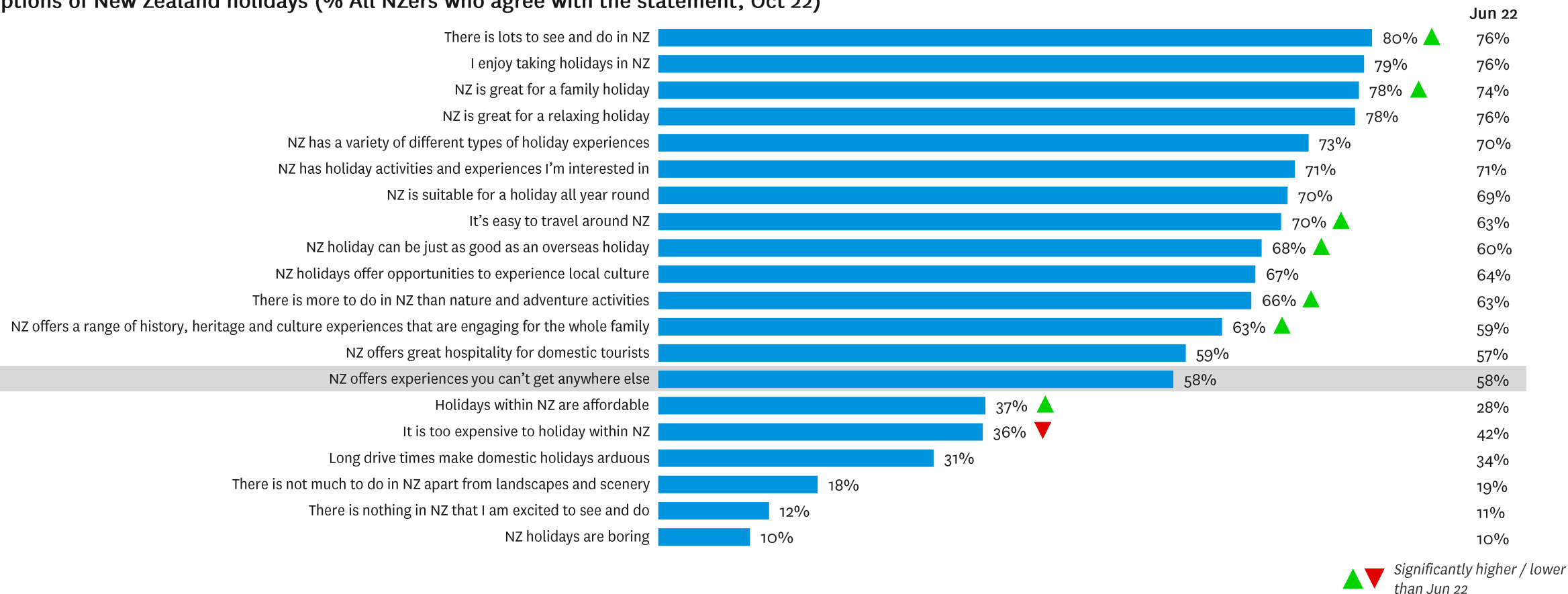
The top drivers of the domestic holiday are similar between mindsets

Factors that are important to NZers when deciding to take next holiday – by mindset (% NZers planning a holiday, Oct 22)

	Lux Adventurers	Thrifty Planners	Considered Rejuvenators	Here & Now-ers	Curious Explorers
Opportunities to relax and refresh	58%	69%	70%	39%	60%
Accommodation options to suit my budget	53%	69%	67%	40%	68%
It's easy to travel around to see and do things	50%	57%	56%	36%	53%
Good local food & beverage experiences	47%	56%	54%	38%	50%
Spectacular natural landscapes and scenery	48%	46%	52%	34%	60%
Place I have never been before	50%	44%	49%	34%	53%
Ideal for having fun and enjoying yourself	49%	49%	45%	33%	54%
Amazing beaches	39%	35%	41%	41%	39%
Wide variety of things to see and do for adults	39%	41%	46%	25%	39%
A good mix of outdoor & adventure activities	49%	33%	27%	29%	45%
Iconic attractions and landmarks	39%	43%	42%	28%	31%
Good hiking / walking tracks	38%	26%	23%	30%	48%
You can see a lot without having to travel far	35%	31%	31%	26%	32%
Ideal for a family holiday	33%	37%	28%	28%	28%
Opportunities to see local wildlife	30%	28%	29%	26%	36%

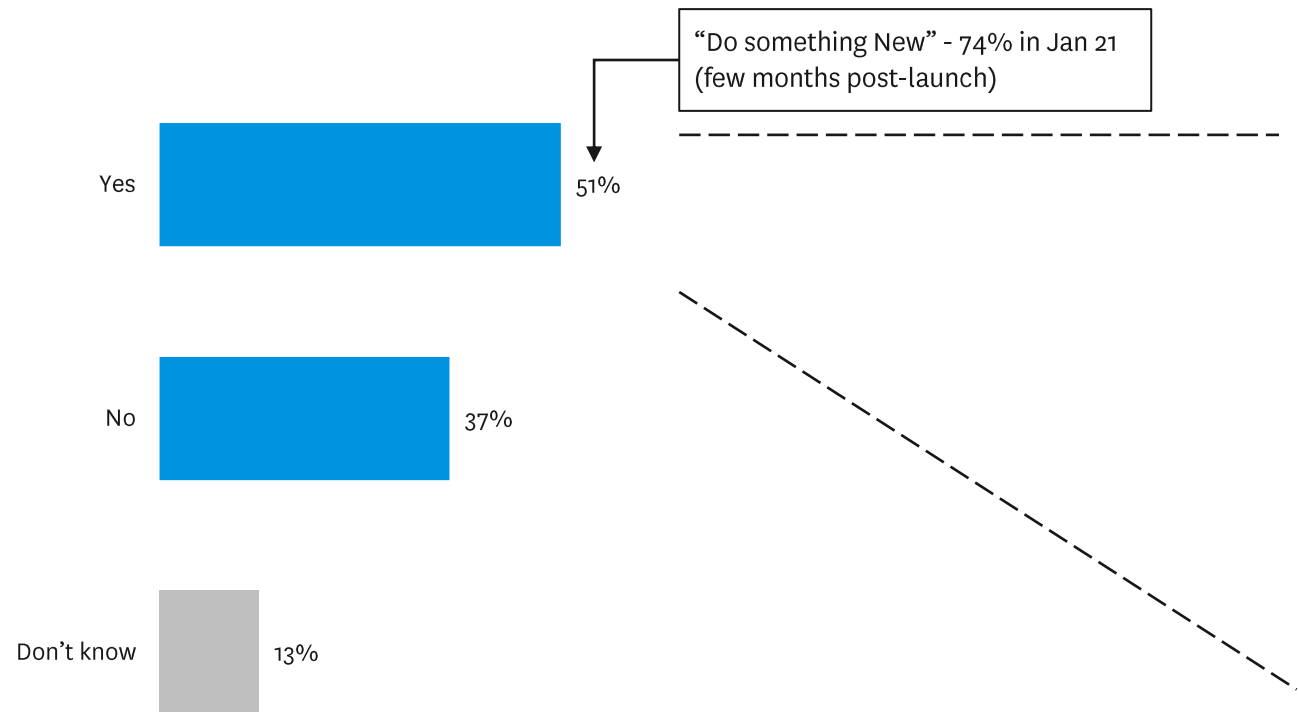
Perceptions of New Zealand holidays have strengthened on a number of aspects with 8 in 10 New Zealanders agreeing that there is lots to see and do in NZ - there is still job to be done to drive perceptions of the uniqueness of New Zealand holiday experiences

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



Awareness of the ‘If You Seek’ campaign is strong

Awareness of ‘If You Seek’ campaign - total and by mindset (% All NZers, Oct 22)



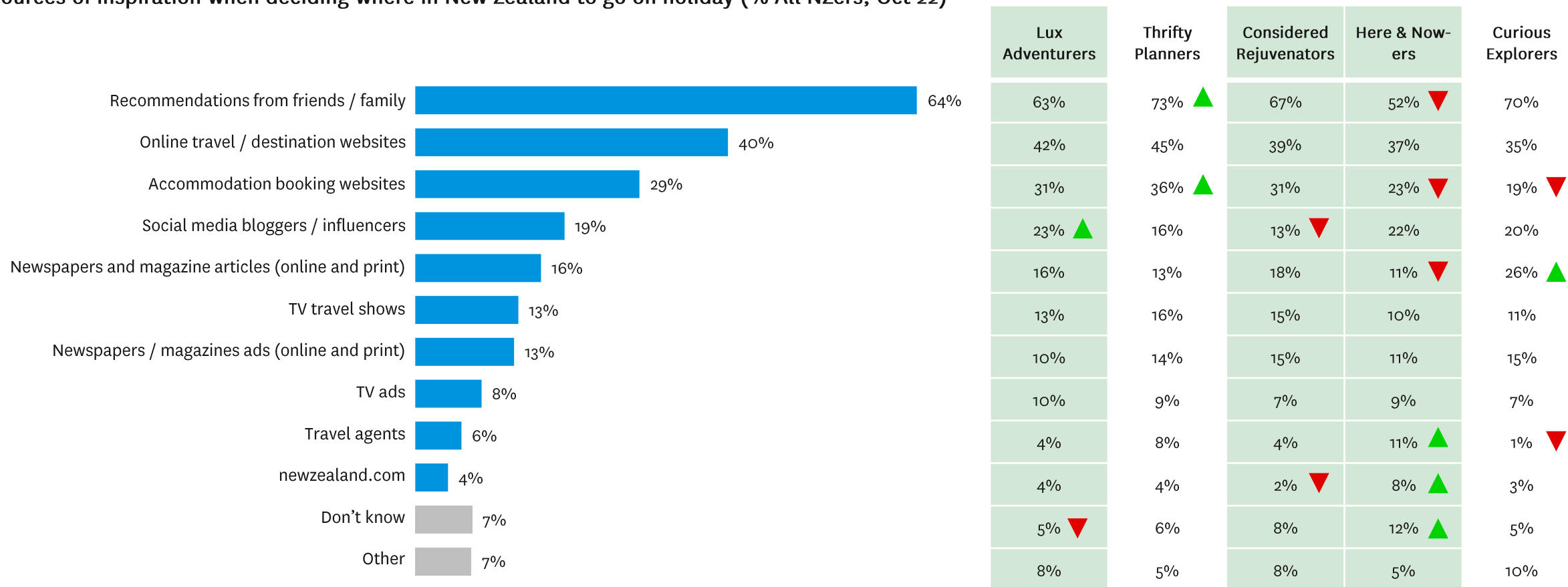
Question: Have you seen or heard any advertisements recently showing snippets of destinations and activities to encourage Kiwis to seek and explore more in New Zealand?

Mindsets	Oct 22
Lux Adventurers	49%
Thrifty Planners	51%
Considered Rejuvenators	57% ▲
Here & Now-ers	46%
Curious Explorers	52%

▲ ▼ Significantly higher / lower than other mindsets

The best opportunities for TNZ to inspire NZers are through earned and owned channels

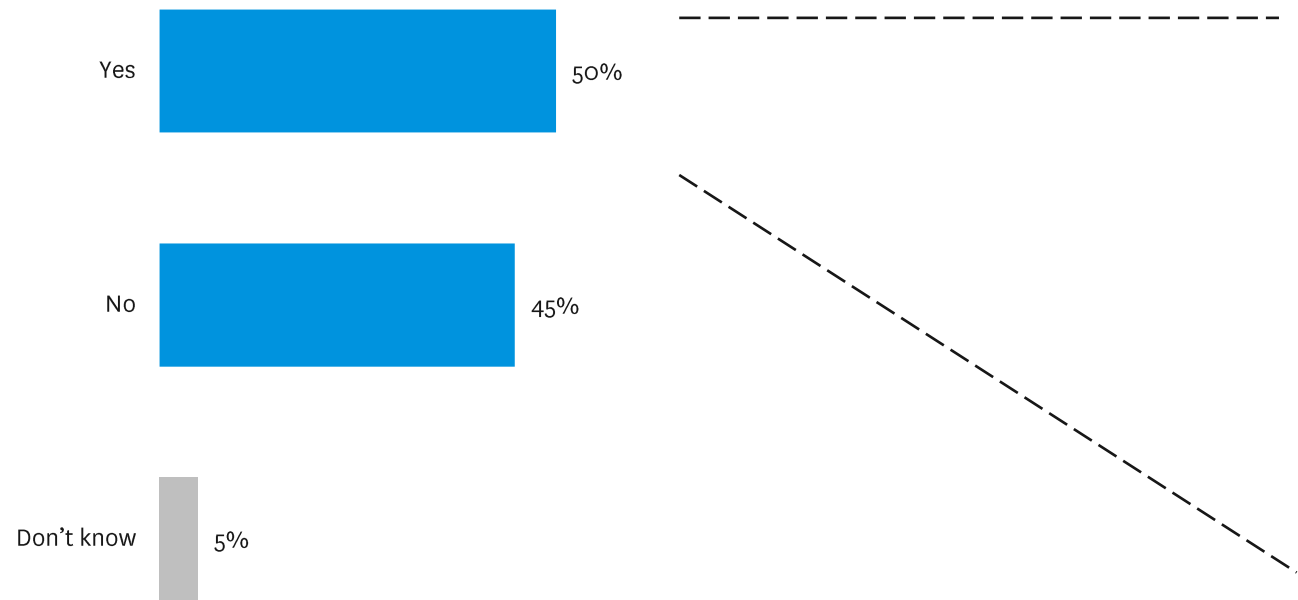
Sources of inspiration when deciding where in New Zealand to go on holiday (% All NZers, Oct 22)



Qualmark, New Zealand tourism’s official quality assurance organisation, has a good level of awareness

Awareness of Qualmark - total and by mindset (% All NZers, Oct 22)

Question: Qualmark is New Zealand tourism’s official quality assurance organisation, providing a trusted guide to travel in New Zealand. Had you heard of Qualmark before today?



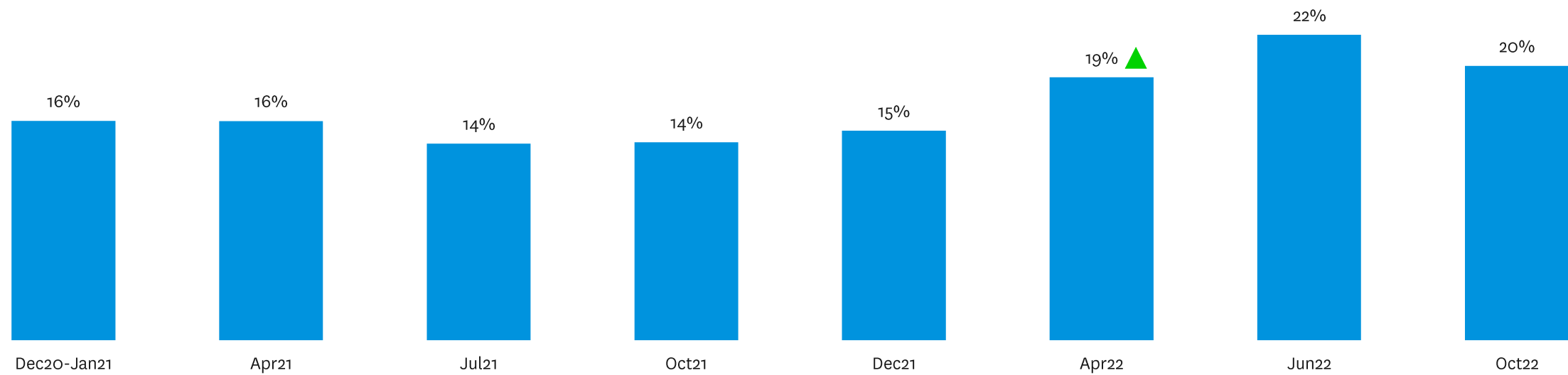
Mindsets	Oct 22
Lux Adventurers	49%
Thrifty Planners	54%
Considered Rejuvenators	60% ▲
Here & Now-ers	32% ▼
Curious Explorers	63% ▲

▲ ▼ Significantly higher / lower than other mindsets

Awareness of the Tiaki Promise hovers around 20% mark

Awareness of Tiaki Promise (% All NZers)

Question: Have you heard of the Tiaki Promise – an initiative encouraging New Zealanders to care for New Zealand and its environment and culture?



▲ ▼ Significantly higher / lower than previous quarter

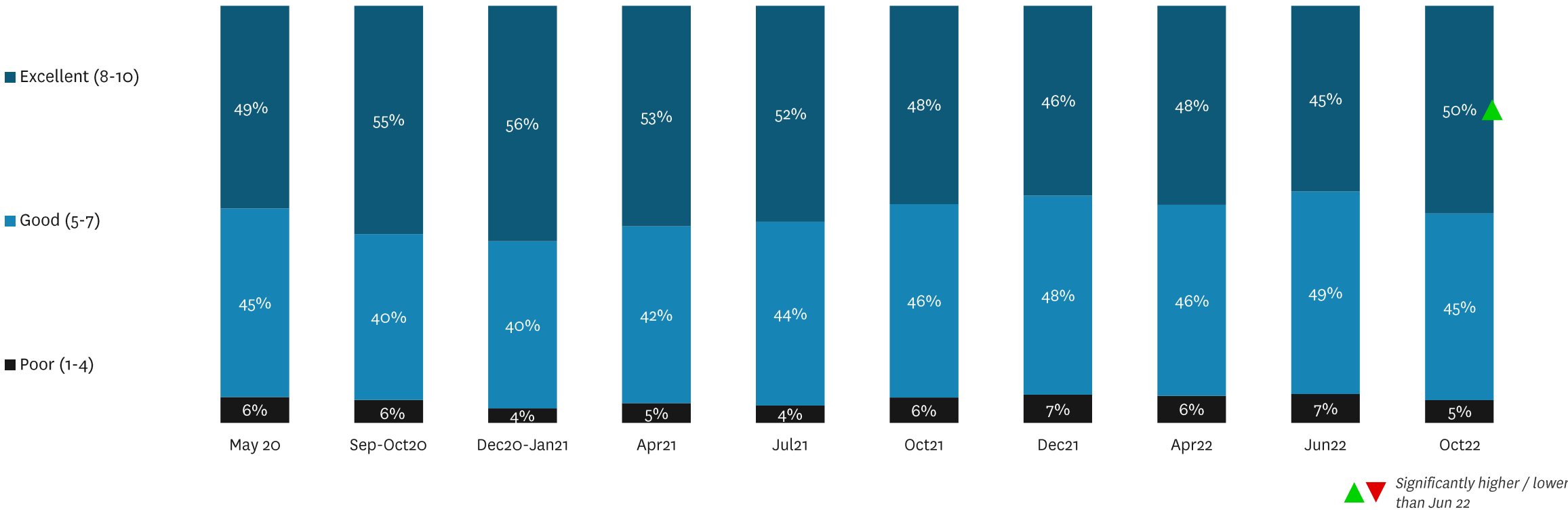
3

How does New Zealand deliver to holiday experiences?



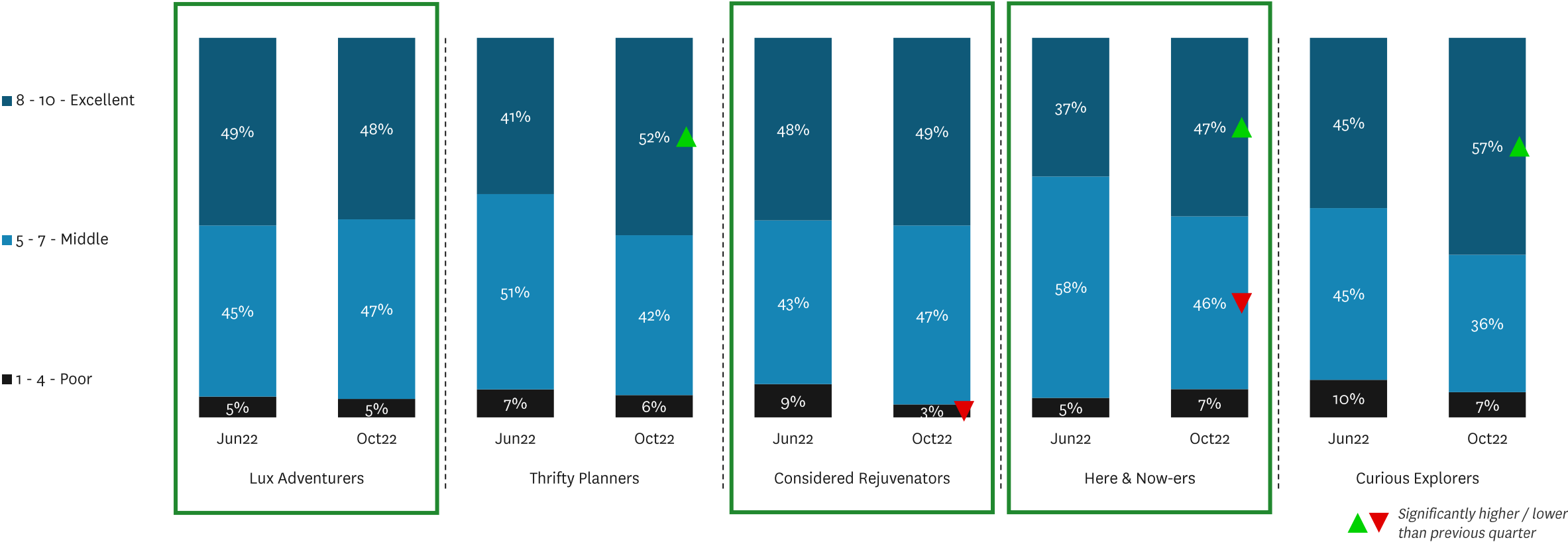
Perceptions of how well New Zealand holidays deliver to expectations have improved in Oct 22, after being less favourable over the past year

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



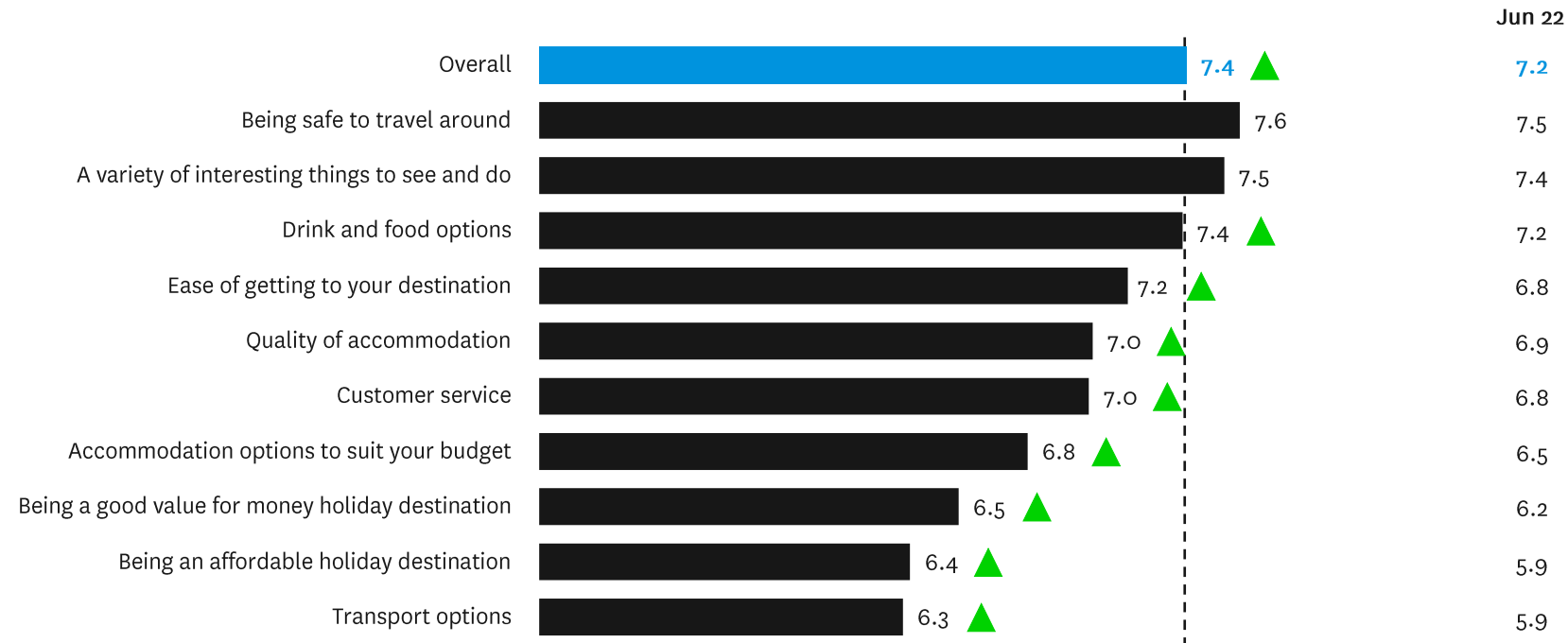
Stronger perceptions of New Zealand holiday experiences were seen among Curious Explorers, Here & Now-ers and Thrifty Planners

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



There have been noticeable improvements in all aspects of domestic holiday experience compared to our last research wave

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

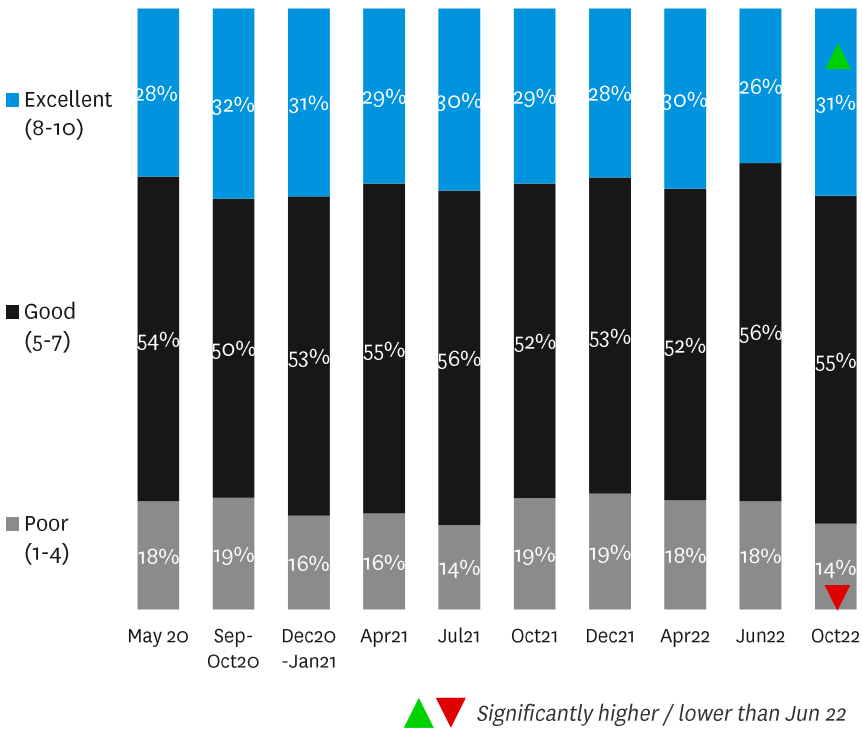


▲ ▼ Significantly higher / lower than previous quarter

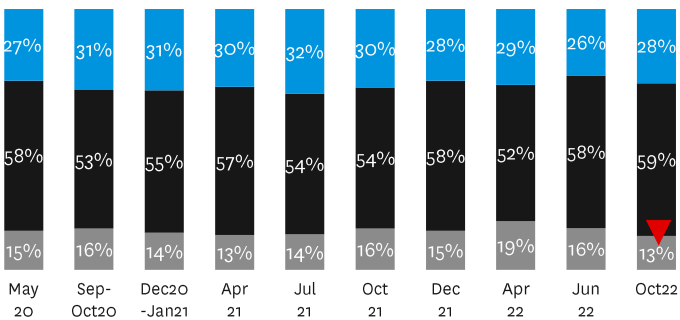
More NZers this quarter agree that domestic holidays offer excellent value for money, with improvements in value perceptions of accommodation and activities

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

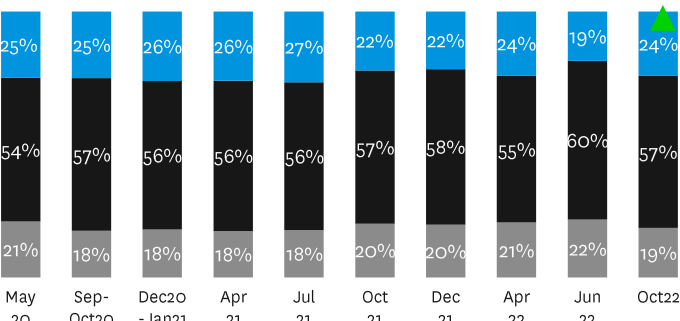
Overall value for money



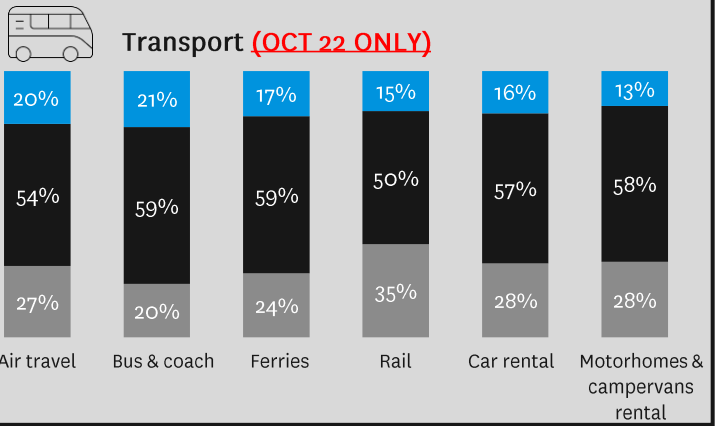
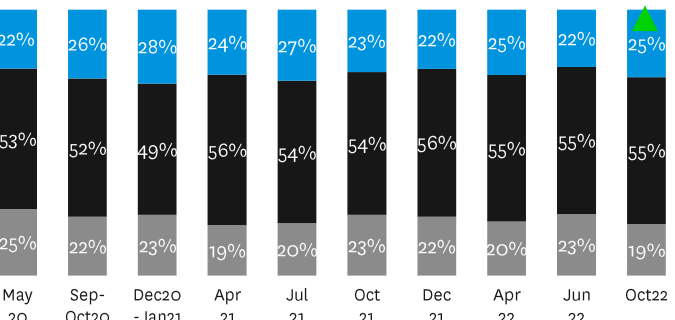
Food and drink options



Accommodation



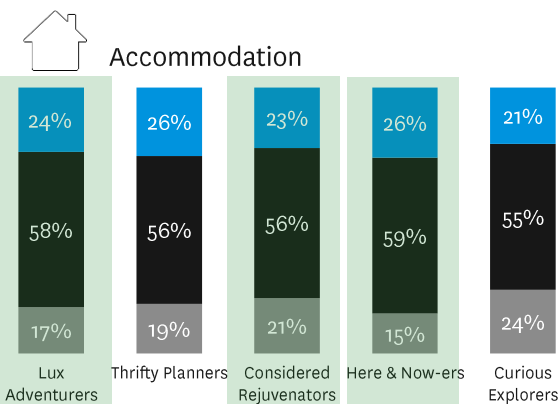
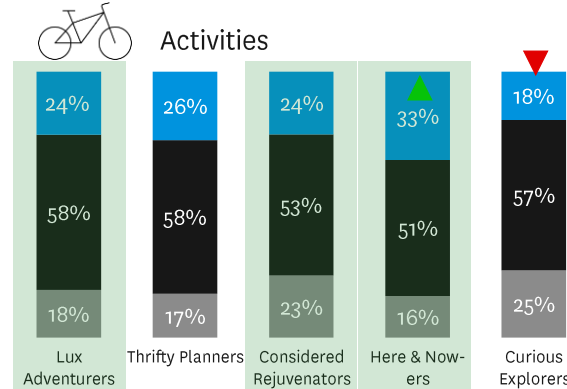
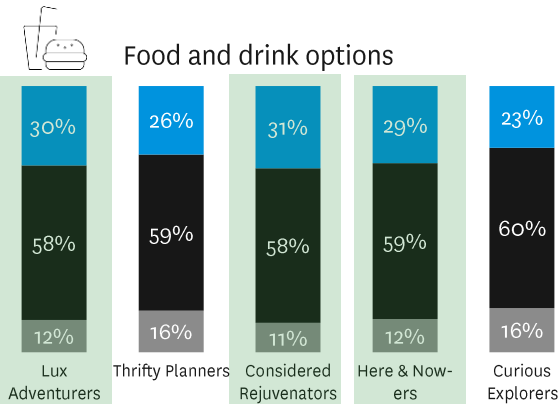
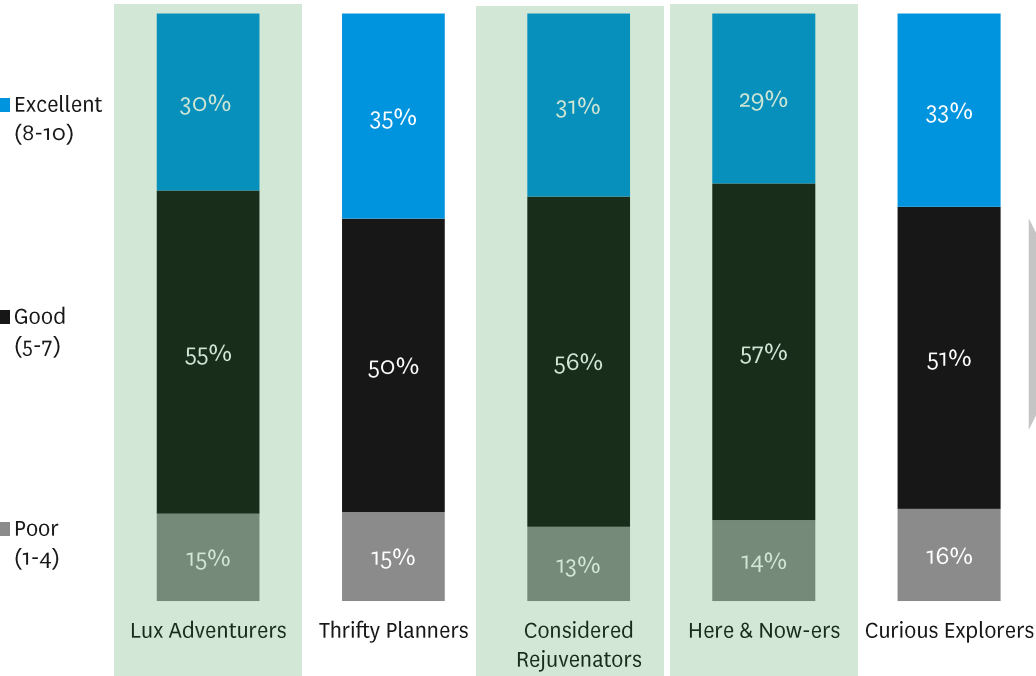
Activities



Perceptions of value of New Zealand holidays overall and on the aspects of food, activities and accommodation are largely consistent across mindsets – with Here and Now-ers seeing higher value in experiences, compared to other mindset

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

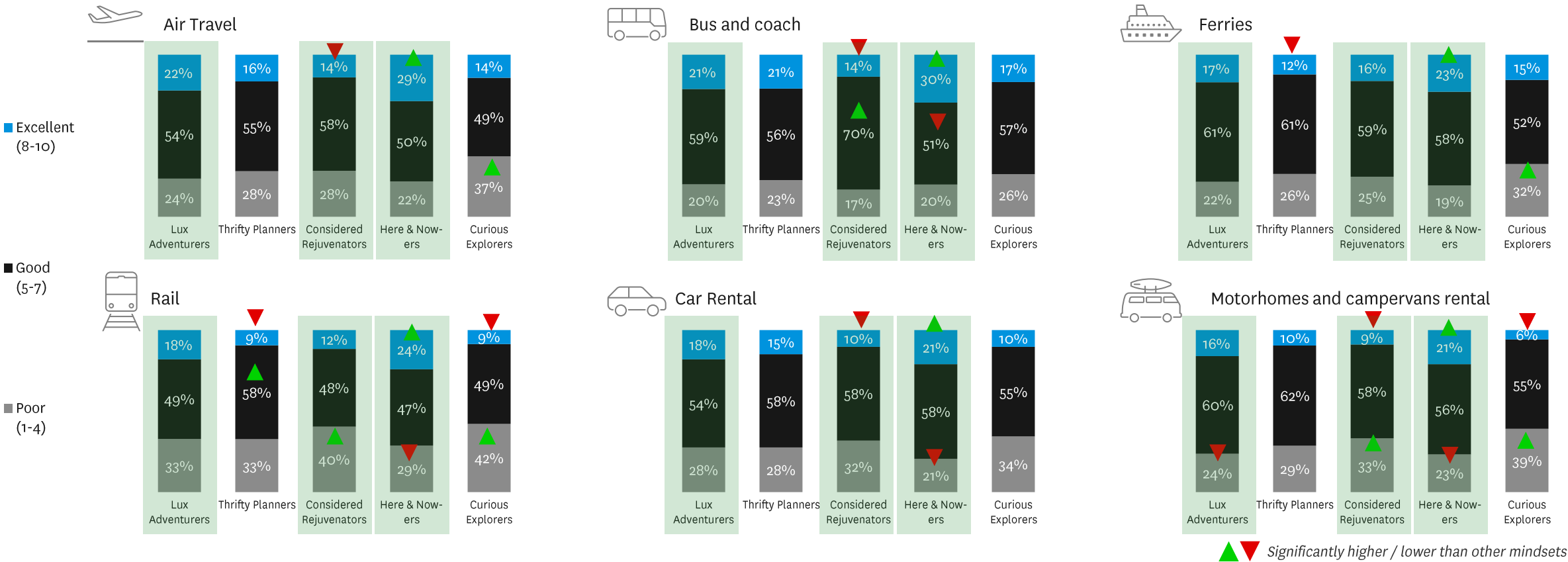
Overall value for money



▲ ▼ Significantly higher / lower than other mindsets

Perceptions of value for money of transport options vary by mindset, being generally lower among Curious Explorers

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



Appendix

Research methodology and sample



Deep dive (Oct 22)



Total sample

1200



Survey length (max)

15 min

Oct 22 Deep Dive fieldwork period |
23 September – 11 October 2022



Sample

Oct 22

Auckland	415
Waikato	120
Bay of Plenty	59
Gisborne	6
Hawke's Bay	56
Taranaki	23
Manawatu-Whanganui	61
Wellington	131
Tasman	15
Nelson	15
Marlborough	21
West Coast	6
Canterbury	156
Otago	52
Southland	20
Northland	43
Total	1200