



100% PURE
NEW ZEALAND

DOMESTIC AUDIENCE UNDERSTANDING

Insights driven approach to encourage
New Zealanders to experience all that
New Zealand has to offer



DOMESTIC VALUE & MARKET SIZE

Domestic travel demand in New Zealand, pre Covid-19

\$17.9B
HOUSEHOLD

\$23.7B
total value

\$5.8B
BUSINESS

Domestic Household tourism at \$17.9b excludes airfares and holiday home rentals which are not captured at this level as they're difficult to apportion by region

Source: Monthly Regional Tourism Estimates (MRTE), Ministry of Business, Innovation and Employment



72%

of New Zealanders
travelled for leisure
purposes in 2019



90%

of domestic leisure
travel in New Zealand
is via car

61%
DAY TRIPS

45M
domestic trips
per year

39%
OVERNIGHT

Source: Domestic Growth Insights Tool (DGIT)

APPEAL

The drivers of holiday appeal are largely universal



RELAXATION

a break from the busyness of everyday life



ENJOYMENT

to have fun



EXPERIENCE

often outweighs destination when it comes to taking a leisure holiday



UNIQUE EXPERIENCES

also hold significant appeal

AUDIENCE

In population terms, the largest segments for domestic leisure travel are somewhat unsurprisingly:



Visiting family and relatives (VFR)



Families with children

Significant segments, likely to take more daytrips and overnight breaks over the course of a year include:



Empty nesters seeking a relaxing break



Younger single-income, no kids and double-income, no kids seeking a relaxing break



New migrants too are an important audience, participating in domestic leisure travel, often to familiarise themselves with New Zealand culture