Understanding New Zealanders’ attitudes towards holidaying within New Zealand.

There is strong demand for domestic holidays, driven by a desire to support the economy and to see more of New Zealand, both in the long and short-term.

64% intend to holiday within New Zealand in the next 12 months

43% of those New Zealanders that intend to holiday within the next 12-months intend to spend more than they typically would on domestic holidays

Restaurants & cafes, accommodation and transport providers are likely to benefit the most

<table>
<thead>
<tr>
<th>Activity</th>
<th>Spend More (%)</th>
<th>Spend Less (%)</th>
<th>No Change (%)</th>
<th>Unsure (%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation</td>
<td>63%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Scenic Activities</td>
<td>62%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Eating Out</td>
<td>57%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Transport</td>
<td>57%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Adventure Activities</td>
<td>43%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Shopping</td>
<td>35%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Cultural Activities</td>
<td>32%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
<tr>
<td>Cycling</td>
<td>16%</td>
<td></td>
<td>39%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Where New Zealanders are looking to spend more
(of the 43% intending to spend more)

Source: Domestic Sentiment Quantitative Research – Kantar – June 2020
Most New Zealanders intend to take more frequent domestic holidays rather than longer holidays.

However, the following audience segments indicated a stronger intent vs. other segments to take longer breaks:

- Aucklanders
- New migrants
- High income groups

Aucklanders are generally more likely to travel domestically with greater frequency than their pre Covid-19 habits, when compared to other New Zealanders.

### Reasons for wanting to take more frequent holidays within New Zealand

(\% NZers who plan to take a domestic holiday in next 12 months)

- **64\%** To support local economy
- **56\%** To see more of New Zealand
- **55\%** To visit a place in New Zealand I have not been before
- **50\%** To substitute for overseas holidays
- **26\%** To visit family/friends more often

A stronger motivator among those who intend to take longer domestic holidays VS pre COVID-19, and also empty nesters

A slightly stronger motivator among those who intend to take longer domestic holidays VS pre COVID-19

For most New Zealanders the feeling of being on holiday is not defined by boarding a plane to go overseas – it is more so about heading somewhere to relax and escape the daily routine.

New Zealanders do not define a domestic holiday by the length of time but the majority do need to travel to a different region to feel they are on holiday.

### Duration or length of trip associated with a ‘holiday’ in the context of a holiday within New Zealand

(\% NZers who plan to take a domestic holiday in next 12 months)

- **DAY TRIP 1 DAY** 9\%
- **WEEKEND 2-3 DAYS** 53\%
- **SHORT 4-5 DAYS** 61\%
- **WEEK-LONG 6-7 DAYS** 61\%
- **TWO-WEEK 8-14 DAYS** 43\%
- **LONGER 14+DAYS** 35\%

82\% of New Zealanders agree that it is important to travel to support local businesses

71\% of New Zealanders agree that now is a good opportunity to experience NZ like international visitors do

90\% of New Zealanders would need to travel outside their region for it to feel like a holiday

Source: Domestic Sentiment Quantitative Research – Kantar – June 2020
New Zealanders are aware of how interesting, fun and relaxing a domestic holiday can be.

81% agree that there is a lot to see and do

60% agree that New Zealand offers experiences you can’t get elsewhere

While the main trigger for domestic holidays is needing a break, many New Zealanders also travel more purposely i.e. to visit a specific region, to see more of New Zealand.

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

48% Wanted to get away / needed a break

37% Wanted to see more of New Zealand

33% To visit family/friends

32% Wanted to visit a specific region/place

19% It was a long weekend

18% Wanted to do a specific activity

13% An event (i.e. concert, sport etc)

New Zealanders are keen to discover new places where they can have fun but also relax & refresh, experience good food and visit iconic landmarks.

The top things New Zealanders are looking for are very similar across various segments, with some minor differences:

- Families have a stronger focus on activities for children and family-friendly locations
- Food & beverage experiences are more important to empty-nesters
- New migrants have a stronger interest in outdoor adventure activities and nightlife

Top seven things New Zealanders are looking for in a New Zealand holiday

1. Place I have never been before
2. Spectacular natural landscapes
3. Accommodation options to suit my budget
4. Opportunities to relax and refresh
5. Good local food and beverage experiences
6. Iconic attractions and landmarks
7. Ideal for having fun and enjoying myself

Source: Domestic Sentiment Quantitative Research – Kantar – June 2020
Perceptions that domestic holidays are too expensive and lack value for money limit the desire for domestic travel: deals could stimulate demand short-term, but long-term a more sustainable solution is needed.

Perceptions of value for money of New Zealand holidays are relatively weak – this could be an opportunity to drive value perceptions through communicating enriching experiences that demonstrate value-for-money.

When New Zealanders intend to take a domestic holiday (% NZers who will take a domestic holiday in the next 12 months)

- 40% Outside school holidays
- 30% Christmas and New Year period
- 16% Winter school holidays
- 16% Ski season
- 15% Labour day
- 13% Summer school holiday
- 12% Spring school holiday

This is mostly SINKS (single-income, no kids), DINKS (double-income, no kids) and empty nesters

Source: Domestic Sentiment Quantitative Research – Kantar – June 2020