

DOMESTIC AUDIENCE SENTIMENT



100% PURE
NEW ZEALAND

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

Intended change in spend behaviour compared to a typical year pre Covid-19
(% NZers who plan to take a domestic holiday in next 12 months)



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



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)



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

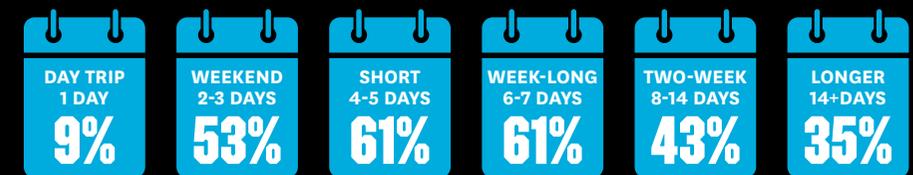


For most New Zealanders the feeling of being on holiday is not defined by boarding a plane to go overseas – it is more so about heading somewhere to relax and escape the daily routine.

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)



90%

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



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)



A stronger motivator among empty nesters

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

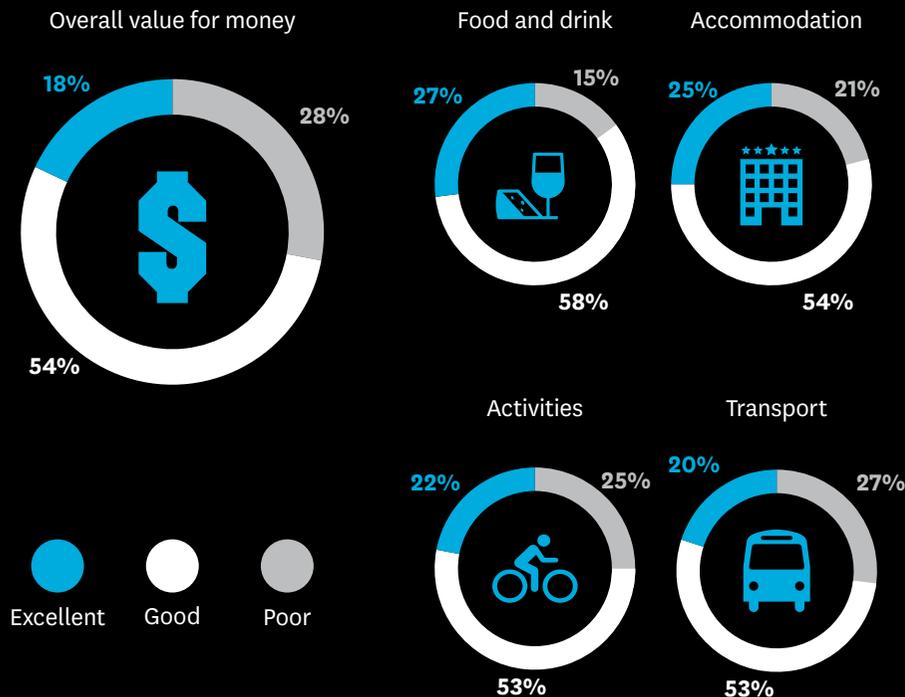
Top seven things New Zealanders are looking for in a New Zealand holiday

- 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

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.

Perceptions of value for money in relation to a New Zealand holiday



Weekend and short trips are the most likely holidays New Zealanders will take, and to a great extent desire to take longer holidays is down to having enough annual leave.

A large proportion of New Zealanders are open to travelling outside school holidays – predominately non-family segments.

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

