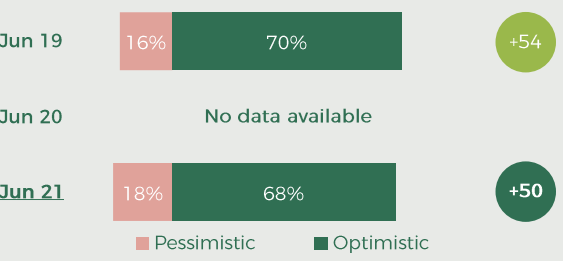
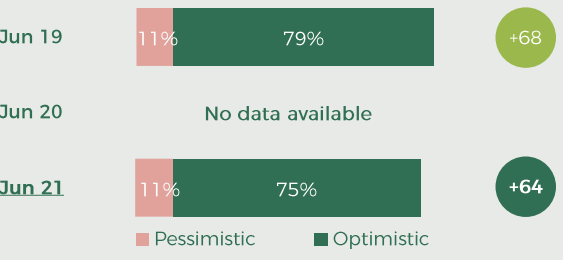


BUSINESS CONFIDENCE MONITOR

Confidence right now



Confidence for the next 12 months



Demand vs. last year...

Compared with the same period last year, **67%** of Holiday Parks experienced an increase in demand during autumn (March to May), while **16%** experienced a decrease in demand.

Looking forward, **22%** expect to experience an increase in demand during winter (June to August) compared with the same period last year, while **32%** expect to experience a decrease.

Confidence score = (total optimistic) - (total pessimistic)
Based on a June 2021 survey of Holiday Parks NZ members
A more detailed breakdown is available on request.

Main factors contributing to the change in demand expected during winter

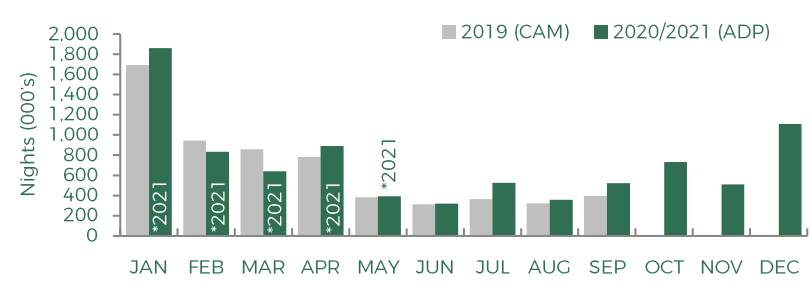
▲ Demand expected to INCREASE	▼ Demand expected to DECREASE
67% Domestic visitor market	52% Impact of COVID-19
57% Appeal of region	45% International visitor market
38% Appeal of holiday parks	31% Domestic visitor market
38% Impact of COVID-19	29% Global economic conditions

HOLIDAY PARK SHARE OF TRADITIONAL COMMERCIAL ACCOMMODATION MARKET (ADP: YE MAY 2021)

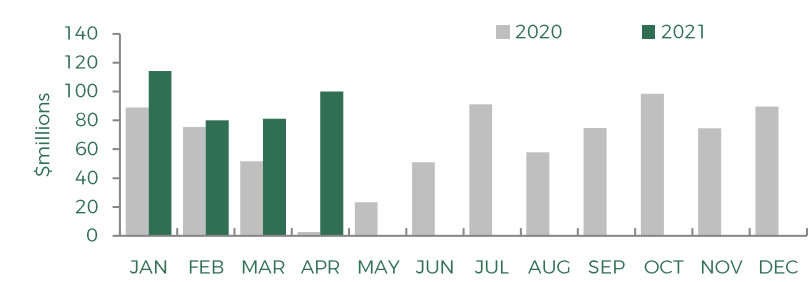
	Guest Nights	Market Share	Occupancy	Avg. Nights per guest
Holiday Parks	8,688,900	30%	25%	2.4
Hotels	9,276,600	32%	53%	2.3
Motels	9,048,500	31%	60%	2.1
Backpackers	2,050,800	7%	34%	2.8

Motel Occupancy and Average nights per guest have been weighted by number of establishments

SEASONALITY: HOLIDAY PARK GUEST NIGHTS BY MONTH (VS. PREVIOUS YEAR)



TOTAL ACCOMMODATION SERVICES SPEND – DOMESTIC ONLY (TECTS)



HOLIDAY PARKS REGIONAL VIEW (ADP: YE MAY 2021)

Region	RTO	Guest Nights	Market Share *
Northland		920,600	50%
Auckland		311,400	7%
Waikato		337,500	28%
Coromandel		536,600	61%
Bay of Plenty		698,200	49%
Rotorua		273,500	22%
Lake Taupo		353,300	28%
Eastland		416,400	65%
Hawke's Bay		450,600	40%
Taranaki		221,400	31%
Wairarapa		108,500	38%
Wellington		148,200	7%
Marlborough		178,500	28%
Nelson Tasman		700,900	50%
West Coast		363,300	42%
Kaikoura		183,700	55%
Hurunui		186,800	45%
Canterbury		570,800	22%
Timaru		139,000	45%
Mackenzie		168,500	40%
Waitaki		119,600	40%
Central Otago		178,100	59%
Lake Wanaka		314,700	49%
Clutha		27,200	66%
Southland		26,600	19%
Fiordland		44,700	45%

*of commercial guest nights in region (Regions with insufficient sample excluded)

HOLIDAY PARK SUPPLY



ADP, May 2021

Accommodation Types	Number available
Backpacker beds	1,949
Cabin units	2,398
Ensuite units	687
Motel units	1,391
Powered sites	16,337
Unpowered sites	10,771

Source: Holiday Parks New Zealand members, May 2021

Note: For all data sourced from the ADP, 'Holiday Parks' includes campgrounds & 'Motels' includes apartments