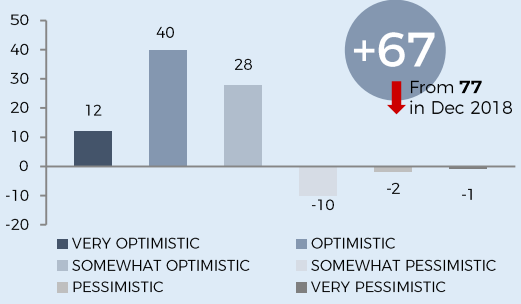
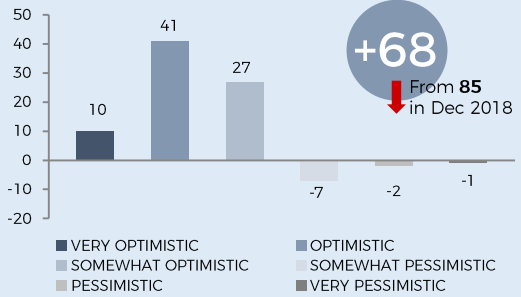


BUSINESS CONFIDENCE MONITOR

Confidence right now



Confidence for the next 12 months



Demand vs. last year...

Compared with the same periods last year, 50% of Holiday Parks experienced an increase in demand during summer (December to February), and 27% expect to experience an increase in demand during autumn (March to May).

Confidence score = (total optimistic) - (total pessimistic)
Based on a March 2019 survey of Holiday Parks NZ members

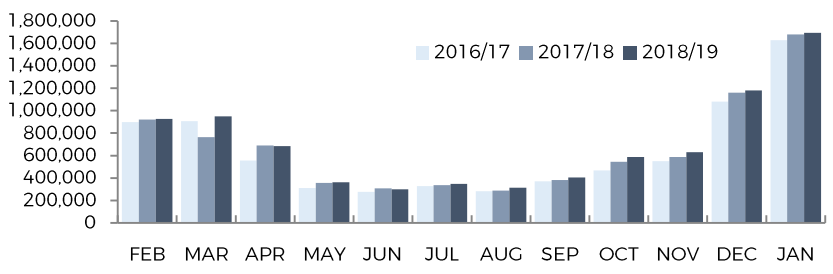
HOLIDAY PARK SHARE OF TRADITIONAL COMMERCIAL ACCOMMODATION MARKET

(CAM - YE JAN 2019 VS. PREVIOUS YEAR)

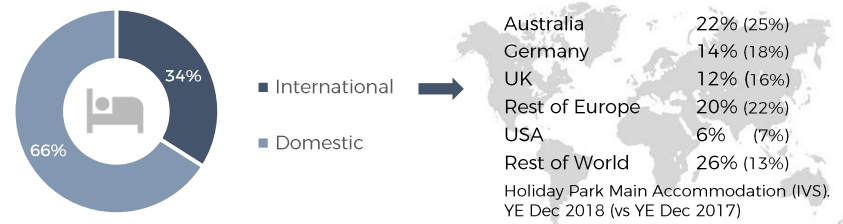
	Guest Nights	YOY Change	Market Share	Occupancy
Holiday Parks	8.4m (8.0m)	+5%	21% (20%)	21% (20%)
Hotels	14.5m (14.0m)	+3%	36% (35%)	69% (70%)
Motels	12.5m (12.3m)	+1%	31% (31%)	61% (61%)
Backpackers	5.0m (5.2m)	-3%	12% (13%)	44% (45%)

SEASONALITY: HOLIDAY PARK GUEST NIGHTS BY MONTH

(VS. PREVIOUS YEARS - CAM)



DEMAND BY MARKET (CAM - YE DEC 2018)



(In the previous year the split was also 66:34)

REGIONAL VIEW (HOLIDAY PARKS, CAM - YE JAN 2019)

Region	Guest Nights	YOY Change	Market Share*	Origin** Dom : Intl
Northland	803,000	+4%	41%	73 : 27
Auckland	407,000	-6%	5%	72 : 28
Coromandel	585,000	+10%	61%	76 : 24
Waikato	296,000	+5%	21%	67 : 33
Bay of Plenty	447,000	-2%	38%	81 : 19
Rotorua	339,000	+8%	15%	60 : 40
Taupō	224,000	+4%	19%	73 : 27
Gisborne	172,000	-2%	43%	-
Taranaki	187,000	+/-0%	28%	81 : 19
Hawke's Bay	305,000	+2%	25%	83 : 17
Kāpiti-Horowhenua	143,000	+15%	51%	-
Marlborough	204,000	5%	27%	58 : 42
Nelson-Tasman	586,000	+4%	40%	73 : 27
Canterbury	1,258,000	+9%	23%	61 : 39
West Coast	339,000	-1%	24%	42 : 58
Wanaka	340,000	+14%	35%	52 : 48
Queenstown	376,000	+2%	10%	36 : 64
Central Otago	161,000	-6%	48%	-
Dunedin	157,000	+3%	17%	-
Southland	85,000	+11%	18%	43 : 57

*of commercial guest nights in region ** YE Dec 2018
Regions with insufficient sample excluded

HOLIDAY PARKS: SUPPLY



Accommodation Types	Number available
Backpackers	2,498
Cabins	2,399
Ensuite Units	488
Motel Units	1,888
Powered Sites	18,437
Unpowered Sites	13,051

Source: Holiday Parks New Zealand members, 2019

While staying at holiday parks guests contribute over \$1.1 billion annually in direct expenditure to local communities. Approximately \$625 million (53%) is from domestic travellers and \$546 million (47%) is from international travellers. 2016/17 studies by Angus & Associates revealed domestic visitors spend \$114 per day on average, and international visitors \$190. Holiday Parks themselves spend approximately \$356 million per annum - three quarters of this in their local community.

Visitor Behaviour (Angus & Associates 2016/17): Domestic visitors tend to stay longer at a Holiday Park (tending to 'stay put') than international visitors (they tend to 'tour'). They are also more likely to be repeat visitors to a park, and middle aged (whereas international visitors tend to be younger and first time park visitors). Almost half of international holiday park guests are travelling in a campervan compared to just one in ten domestic guests. One quarter of guests stay in on-site built accommodation and tenting also accounts for approximately one quarter of the market. Almost half of peak season Holiday Park guests are travelling with children.

