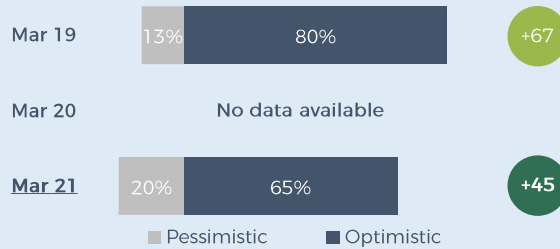
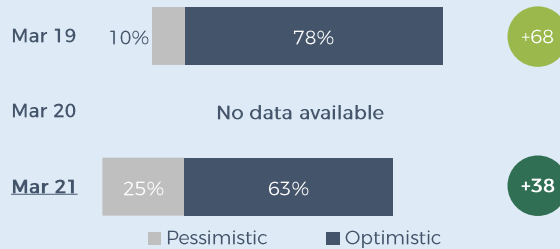


BUSINESS CONFIDENCE MONITOR

Confidence right now



Confidence for the next 12 months



Demand vs. last year...

Compared with the same period last year, **36%** of Holiday Parks experienced an increase in demand during summer (December to February), while **47%** experienced a decrease in demand.

Looking forward, **38%** expect to experience an increase in demand during autumn (March to May) compared with the same period last year, while **30%** expect to experience a decrease.

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

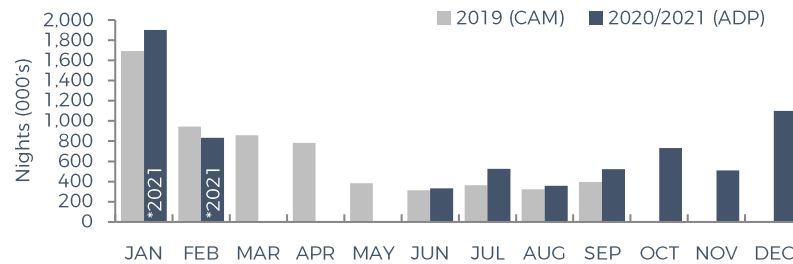
Main factors contributing to the change in demand expected during autumn

HOLIDAY PARK SHARE OF TRADITIONAL COMMERCIAL ACCOMMODATION MARKET (ADP: JUN 2020 - FEB 2021)

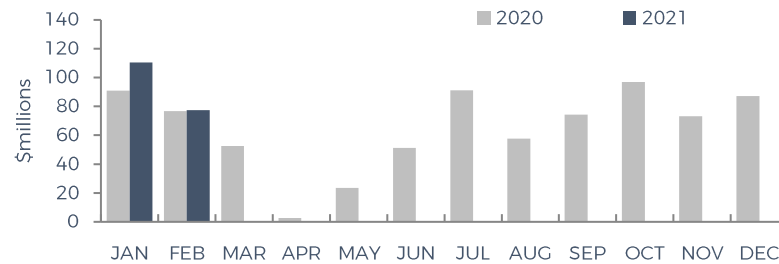
	Guest Nights	Market Share	Occupancy	Avg. Nights per guest
Holiday Parks	6,810,900	31%	26%	2.5
Hotels	6,769,200	31%	52%	2.4
Motels	6,701,100	31%	59%	2.1
Backpackers	1,592,000	7%	34%	2.8

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)



▲ Demand expected to INCREASE	▼ Demand expected to DECREASE
79% Impact of COVID-19	93% Impact of COVID-19
62% Domestic visitor market	56% International visitor market
35% Appeal of region	33% Freedom camping
32% Appeal of holiday parks	30% Domestic visitor market

HOLIDAY PARKS REGIONAL VIEW (ADP: JUN 2020 - FEB 2021)

Region	RTO	Guest Nights	Market Share *
Northland		744,500	52%
Auckland		242,400	7%
Waikato		263,700	29%
Coromandel		432,200	62%
Bay of Plenty		564,900	51%
Rotorua		207,400	21%
Lake Taupo		284,200	29%
Tairāwhiti		333,600	66%
Hawke's Bay		326,400	39%
Taranaki		176,700	33%
Wairarapa		79,100	38%
Wellington		114,800	8%
Marlborough		128,100	28%
Nelson Tasman		558,300	53%
West Coast		272,600	44%
Kaikoura		147,800	57%
Hurunui		142,200	46%
Canterbury		429,300	22%
Timaru		98,300	44%
Mackenzie		133,000	42%
Waitaki		86,400	42%
Central Otago		138,500	61%
Lake Wanaka		260,100	51%
Clutha		76,200	74%
Southland		64,200	22%
Fiordland		106,500	48%

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

HOLIDAY PARK SUPPLY



ADP, Feb 2021

Accommodation Types	Number available
Backpacker beds	1,949
Cabin units	2,408
Ensuite units	686
Motel units	1,443
Powered sites	16,566
Unpowered sites	11,054

Source: Holiday Parks New Zealand members, March 2021