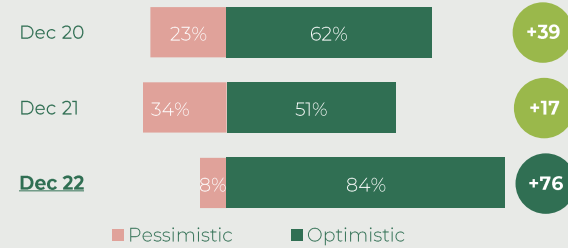


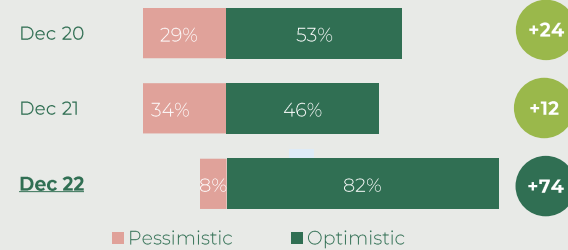
HOLIDAY PARKS - KEY INSIGHTS DECEMBER 2022

BUSINESS CONFIDENCE MONITOR

Confidence right now



Confidence for the next 12 months



Demand vs. last year...

Compared with the same period last year, **71%** of Holiday Parks experienced an increase in demand during spring (September to November), while **12%** experienced a decrease in demand.

Looking forward, **72%** expect to experience an increase in demand during summer (December to February) compared with the same period last year, while **5%** expect to experience a decrease.

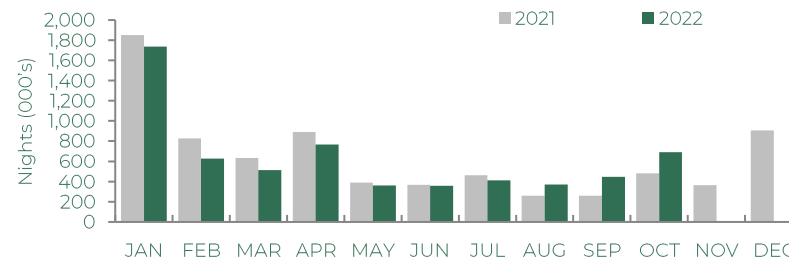
Confidence score = (total optimistic) – (total pessimistic)
Based on a December 2022 survey of HAPNZ members
A more detailed breakdown is available on request.

HOLIDAY PARK SHARE OF TRADITIONAL COMMERCIAL ACCOMMODATION MARKET (ADP: YE OCT 2022)

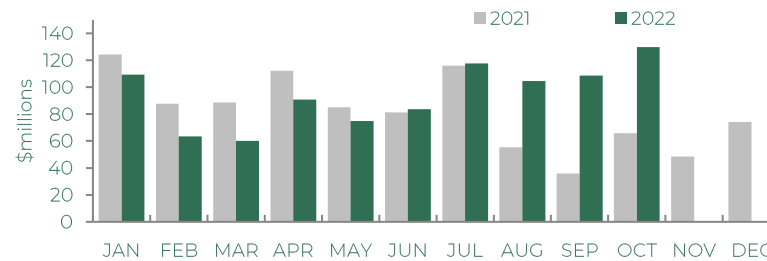
	Guest Nights	Market Share	Occupancy	Avg. Nights per guest
Holiday Parks	7,555,500	28%	23%	2.6
Hotels	8,434,400	31%	51%	2.0
Motels	8,913,300	33%	60%	2.2
Backpackers	1,445,500	5%	37%	2.7
Lodges & boutique accommodation	892,300	3%	37%	2.0

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

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



TOTAL ACCOMMODATION SERVICES SPEND (TECTS)



Main factors contributing to the expected increase in demand during summer

- 68% International visitor market
- 37% Appeal of holiday parks
- 37% Appeal of your region
- 37% Domestic visitor market

HOLIDAY PARKS REGIONAL VIEW (ADP: YE OCT 2022)

Region	Guest Nights	Market Share *
Northland	676,800	47%
Auckland	255,600	7%
Waikato	306,900	32%
Coromandel	497,800	64%
Bay of Plenty	689,300	53%
Rotorua	238,500	26%
Lake Taupo	335,400	29%
Eastland	302,900	61%
Hawke's Bay	369,600	38%
Ruapehu	46,100	15%
Taranaki	220,000	31%
Wairarapa	100,600	37%
Wellington	141,100	7%
Marlborough	179,300	32%
Nelson Tasman	593,600	51%
West Coast	280,500	37%
Kaikoura	124,300	44%
Hurunui	145,400	41%
Canterbury	469,500	19%
Timaru	156,200	49%
Mackenzie	130,900	34%
Waitaki	122,800	37%
Central Otago	133,700	45%
Lake Wanaka	287,300	47%
Queenstown	129,000	6%
Clutha	85,300	69%
Southland	74,900	18%
Fiordland	105,800	41%

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

HOLIDAY PARK SUPPLY



Accommodation Types	Number available
Backpacker beds	1,705
Cabin units	2,229
Ensuite units	678
Motel units	1,319
Powered sites	16,138
Unpowered sites	10,633