



HOLIDAY PARKS ASSOCIATION NEW ZEALAND

Developing the Domestic Market

June 2022

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BACKGROUND & OBJECTIVES

With current uncertainties in the market and the challenges of reliably replicating the Peak Season Visitor Expenditure study over summer 2021/22, the Holiday Parks Association NZ decided to focus this year's efforts on an in-depth study of the domestic market instead.

This study was designed to capture information about: -

- The travel needs, attitudes and behaviours of domestic holiday park visitors over the peak summer season (including motivations for the use of holiday park accommodation, expectations in relation to COVID-safe travel, feedback on aspects of the visitor experience, and high-level patterns of expenditure); and
- New Zealanders travelling over summer and staying in other forms of commercial accommodation (including relevant travel planning behaviour, motivations for choice of alternative accommodation, perceptions of holiday park accommodation and, in particular, barriers to use of holiday parks).

While this research does not give expenditure data to the degree of specificity provided by previous summer surveys, it does offer valuable extra insight to help in the marketing of holiday parks to the domestic market, and ongoing product development.

RESEARCH METHODOLOGY

A sample of n=1832 New Zealand residents (aged 18 years+) was sourced through Dynata (a leading research-only New Zealand consumer panel). Quotas were set to ensure this sample was nationally representative of the New Zealand adult population (aged 18 years or more) with regards to region of residence, age and gender.

Of this sample, n=511 had travelled domestically for leisure purposes over the summer period (18 December 2021 – 28 February 2022) and stayed in commercial accommodation. Only these recent domestic leisure travellers who had stayed in commercial accommodation qualified to participate in the full survey; the remaining n=1321 respondents were screened-out.

Of the sample of n=511 domestic leisure travellers who stayed in commercial accommodation, n=110 survey participants had stayed in a holiday park or camping ground. People in this group were classified as a 'Holiday Park User' and asked about their experience at the holiday park or camping ground, regardless of whether this was their most recent accommodation. Other commercial accommodation types were prioritised based on recency and detailed trip-related information was gathered in relation to each respondent's most recent trip.

An additional booster sample of n=94 New Zealand residents who had stayed in a holiday park or camping ground while travelling for leisure over the summer period was also included in the survey. This booster sample was weighted to ensure it reflected the characteristics of Holiday Park Users in the main sample with regards to region of residence, age and gender.

The survey questionnaire was designed in consultation with the Holiday Parks Association New Zealand. The average (median) survey length was 8.5 minutes. The online survey was programmed and administered by get smart, a specialist system for the collection, management and analysis of survey data. The get smart survey platform is fully optimised for mobile use.

In total then, a sample of n=605 New Zealand residents who had travelled domestically for leisure purposes over the most recent summer period (18 December 2021 – 28 February 2022) and stayed in commercial accommodation were included in the survey (n=204 Holiday Park Users and n=401 who stayed in alternative commercial accommodation).

Survey responses were completed between 17 January and 11 April 2022.

▲ / ▼ Throughout the report these symbols refer to the segment data being significantly higher or lower than the total sample at a 95% confidence level

EXECUTIVE SUMMARY

Key Findings

This research was undertaken to inform the future marketing and development of holiday parks for the domestic market. It recognises not only the importance of the domestic market to the holiday park sector, but also the need and the opportunity to achieve further growth by encouraging New Zealanders to travel and to stay at holiday parks outside of the peak summer season. This will be especially important as international visitor markets return and the sector again faces capacity constraints over the December/January peak.

Key findings of the research include: -

- The main motivations for domestic travel over the peak summer months are 'to rest and relax', 'to spend quality time with family, friends or partner', 'to spend time outdoors in nature' and 'to escape and disconnect from the pressures of everyday life'. The latter two of these motivations are especially important to people who choose to stay in holiday parks.
- Indeed, holiday parks are almost uniquely positioned to cater for New Zealanders wanting to connect with nature and/or to free themselves from the rigours and routines of daily life. At the same time, holiday parks provide a relaxed environment within which Kiwis can enjoy quality time with family and friends, and a much-valued environment of safety in which children are free to explore and connect with new friends.
- Seen in this context, a stay at a holiday park is very much an experience in itself. This is quite unlike many other forms of accommodation, which enable guests to access and enjoy a destination, but which are not necessarily an experience in themselves. This can be seen very clearly in the motivations given for choice of accommodation.
- All major forms of commercial accommodation enjoy high levels of domestic visitor satisfaction, but the satisfaction of holiday park guests is especially high. This is an encouraging affirmation of the excellent job the accommodation sector is doing in what is a trying climate, with COVID-19, workforce shortages, escalating costs and other challenges to deal with.
- While this research was undertaken in relation to travel over the peak summer months, it is clear that many Kiwis are open to a holiday park experience at pretty much any time of year (given the felt need for a break and the right conditions – notably good weather, sufficient money, and the time/opportunity available to take a break).
- The research suggests that the following approaches will be most successful in activating Kiwis who have a latent desire to travel and who are open to the choice of holiday park accommodation: -
 - a) Deals – a discount on accommodation, an upgrade or other value-add

EXECUTIVE SUMMARY [CONT.]

- b) Access to a 'hot pool' experience
 - c) Leverage of local events
 - d) Packaging of holiday park accommodation with a local activity (such as cycling, fishing, water sports, or golf) or access to a popular local attraction
 - e) Holiday-park run events or 'learn to' classes (e.g., learn to surf, fish, kayak or play golf)
- The main barriers to the choice of holiday park accommodation are an aversion to camping and/or the sharing of communal facilities, and a perception that holiday parks are noisy, crowded, and/or uncomfortable (especially in bad weather). These views are sometimes the result of negative past experience but also reflect a somewhat outdated view of a sector that now offers consumers a very wide range of non-built and built accommodation, much of the latter with private facilities and of a standard superior to competing alternatives.

Opportunities

There is potential to grow the holiday park sector by –

- Encouraging currently loyal holiday park users to travel more frequently and to stay off-peak (where facilities exist and/or are appropriate);
- Converting 'considerers' who are currently staying in other forms of commercial accommodation; and
- Fostering relationships with non-users who are nevertheless receptive to holiday park accommodation (including independent domestic travellers and organised groups such as sports teams, school groups and people attending/participating in events).

The research suggests the following as opportunities in this regard: -

1. More explicit positioning of the holiday park sector in relation to the attributes it already 'owns' with those who know and understand the product well: i.e., as an accommodation option for people who enjoy being in the outdoors, connected with nature, wanting freedom from routine and to disconnect from the stresses and pressures of daily life. While the 'family-friendly' nature of holiday parks is an integral component of the holiday park positioning, it is important not to alienate people travelling without children so ensuring the positioning is sufficiently nuanced to appeal to a broad set of guests is essential.

EXECUTIVE SUMMARY [CONT.]

2. Alongside work to more clearly position the holiday park sector, there is an opportunity to address a range of negative perceptions and misconceptions that have dampened some past users' enthusiasm for holiday park accommodation and discouraged non-users from considering holiday parks at all. The sector must address and manage what it can (e.g., quality of facilities, costs, comfort, noise, disruptive guests, perceptions of the range and standard of accommodation on offer), while mitigating what it cannot (weather, insects) if it is to retain current guests and attract new customers in a very competitive and challenging market where discretionary spending is also under pressure.
3. Packaging and promotion of holiday park accommodation alongside popular activities and attractions.

Hiking / walking, fishing, playing golf and cycling / mountain biking are the most popular sporting and recreational activities for holiday park users (for whom sport and recreation are a key motivator to visit). While these findings are based on only a small survey sample, these recreational pursuits are also popular across the wider New Zealand population. For example, the 'New Zealanders in the Outdoors – Domestic Customer Segmentation Research' undertaken by the Department of Conservation found that:

- 91% of New Zealanders take a short walk at least once a year, while 52% have taken a longer walk or hike and 13% have been trail running;
- 31% have been fishing
- 25% have been road cycling and 19% mountain biking;
- 39% have been bird or wildlife watching;
- 82% have had a picnic or barbecue (in the outdoors);
- 81% have been sightseeing; and
- Golf is New Zealand's fifth most popular sport by participation.

Many holiday parks are located where there is opportunity to engage in these sports / recreational pursuits and in many other outdoor activities, and parks should continue to remind current and potential guests of the opportunities available. Furthermore, holiday parks might partner with other local operators to promote 'excursions' to new places / hidden local treasures suitable for a relevant sport or activity in-destination.

EXECUTIVE SUMMARY [CONT.]

4. Alongside the above, the research indicates there is an opportunity to 'create' (and cement loyalty with) new market segments via a programme of events and classes / courses that introduce people to new activities / new skills relevant to the individual holiday park (e.g., learn to surf, learn to fish, learn to play golf, learn to ride and service a mountain bike, learn to forage, etc.). 'Refresher' and 'advanced' classes could then be offered to extend the benefits of this programme over time.
5. Marketing to the education sector. Many holiday parks are well-placed to meet the needs of families, offering facilities and activities which are suitable for this life stage group. This research follows two years of COVID-19 restrictions and lockdowns which have affected many sporting activities and school / group trips. Under normal circumstances, we might have expected organised groups to account for a greater proportion of trips. Regardless, given that the sector is already popular with, and set up for families / children, there may be more potential to market the sector and its facilities to the school / education sector, sports federations etc. This opportunity also presents in light of the unfortunate impact of COVID-19 on the YHA New Zealand network (which was traditionally very strong in the education / sports group market).
6. A range of specific marketing or promotional opportunities -
 - Winter experiences: accommodation and ski packages, hot pools, winter cycling, winter walks and hikes
 - Winter weekends: warm cabins, hot baths and showers, hot pools, winter scenery, peace and quiet, bracing walks/cosy fires and local pubs, warming food in local cafes and restaurants
 - Proactively follow weather forecasts and increase direct / social media (and other) marketing when a good spell of weather approaches; advertise on weather websites
 - Stay abreast of local events / activities / sports tournaments / festivals / seminars / conferences etc and approach organisers directly to offer services; offering discounts or value-adds to guests who belong to these groups
7. A range of product developments / extensions -
 - Glamping facilities
 - Couples / adults-only retreats during school term times
 - 'Zones' (e.g., quiet family areas, no alcohol zones, adults only zones)
 - Fishing (and other activity) weekends or packages with talks from a local guide or expert (e.g., shared stories and anecdotes, best spots and local knowledge, charters and hire equipment).



DOMESTIC
SUMMER
TRAVEL

Destinations Visited

Travel Motivations

Travel Companions

Length of Stay and Trip Duration

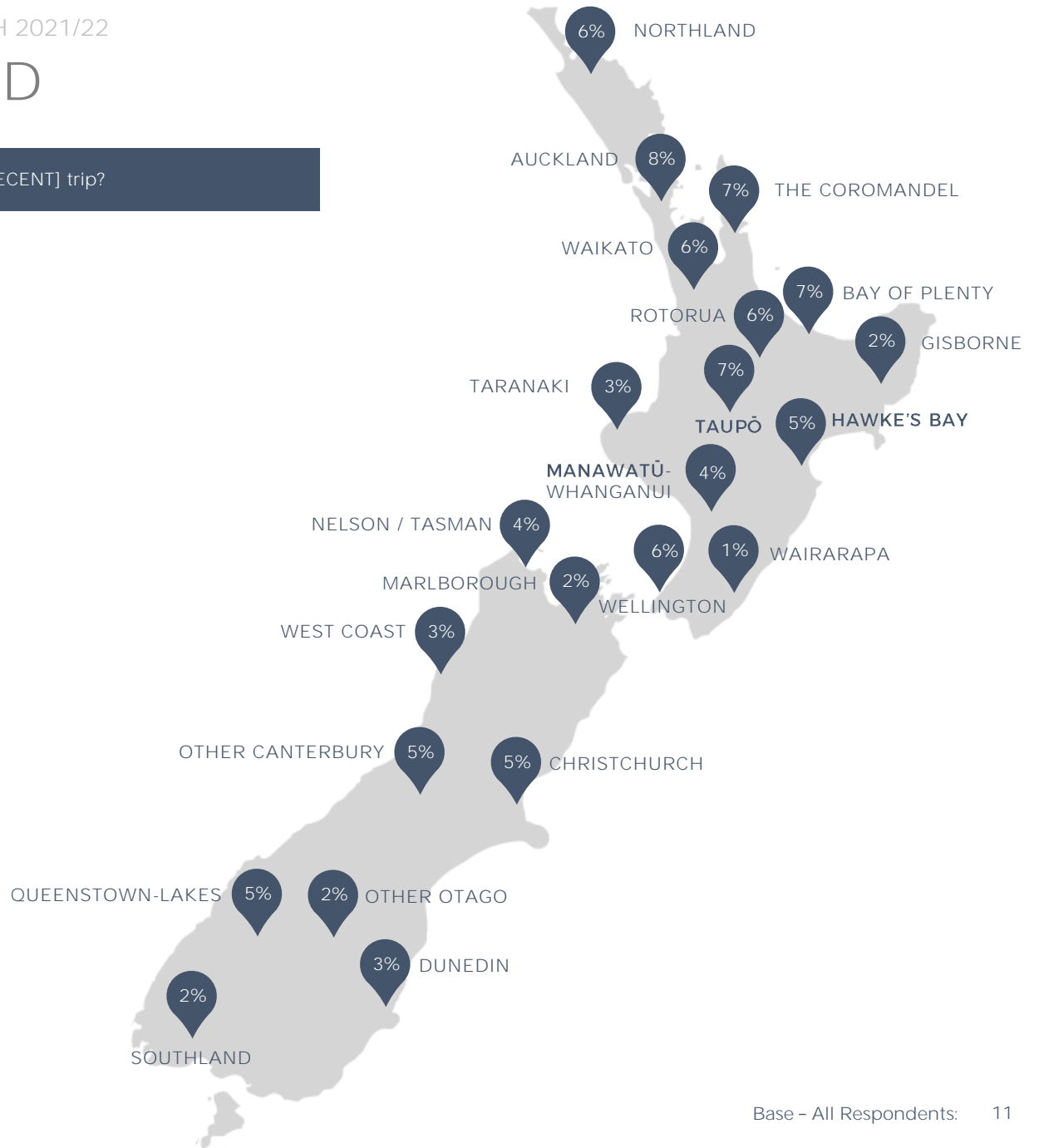
Travel Expenditure

KEY TAKEAWAYS : SUMMER TRAVEL

- This research examined overnight trips taken by New Zealand residents over the most recent summer months (from 18 December 2021 to 28 February 2022). If survey respondents had taken multiple trips during this period, questions collecting detailed trip information – destination, trip motivations, travel party composition, expenditure – were asked in relation to the respondent’s most recent trip. This provides a representative view of trips taken by New Zealanders over the summer months.
- All regions are represented in the travel taken by survey respondents over the 2021/2022 summer months, with trips distributed on a fairly even basis around the country.
- Resting and relaxing, spending quality time with family and friends, spending time outdoors in nature, and escaping and disconnecting from the pressure of everyday life, are all key motivations for domestic travel over the summer months.
- A desire to connect with nature, and to escape and disconnect from the pressures of everyday life, are especially prominent as motivations for those choosing to stay at holiday parks.
- Holiday parks are to some extent synonymous with family travel, with almost half of all holiday park users travelling with children aged 18 years or less, and 22% with children aged less than five. The proportion travelling with children is much higher than for those staying in other forms of commercial accommodation. In contrast, Holiday Parks host a much smaller proportion of solo travellers.
- However, total group size is not dissimilar overall, with average group size for Holiday Park users being 3.9 (2.8 adults and 1.1 children) and for other accommodation 4.3 (3.5 adults and 0.8 children).
- Stay duration is seven nights or less for 87% of Holiday Park users and 92% of those staying in other forms of accommodation; indicating that average length of stay is typically longer in Holiday Parks. This is also reflected in overall trip duration (i.e. time spent away from home on a given trip).
- Compared with those staying in other forms of commercial accommodation, Holiday Park users typically spend slightly less per trip, and less on travel each year, although the difference in overall patterns of expenditure is not significant.

DESTINATIONS VISITED

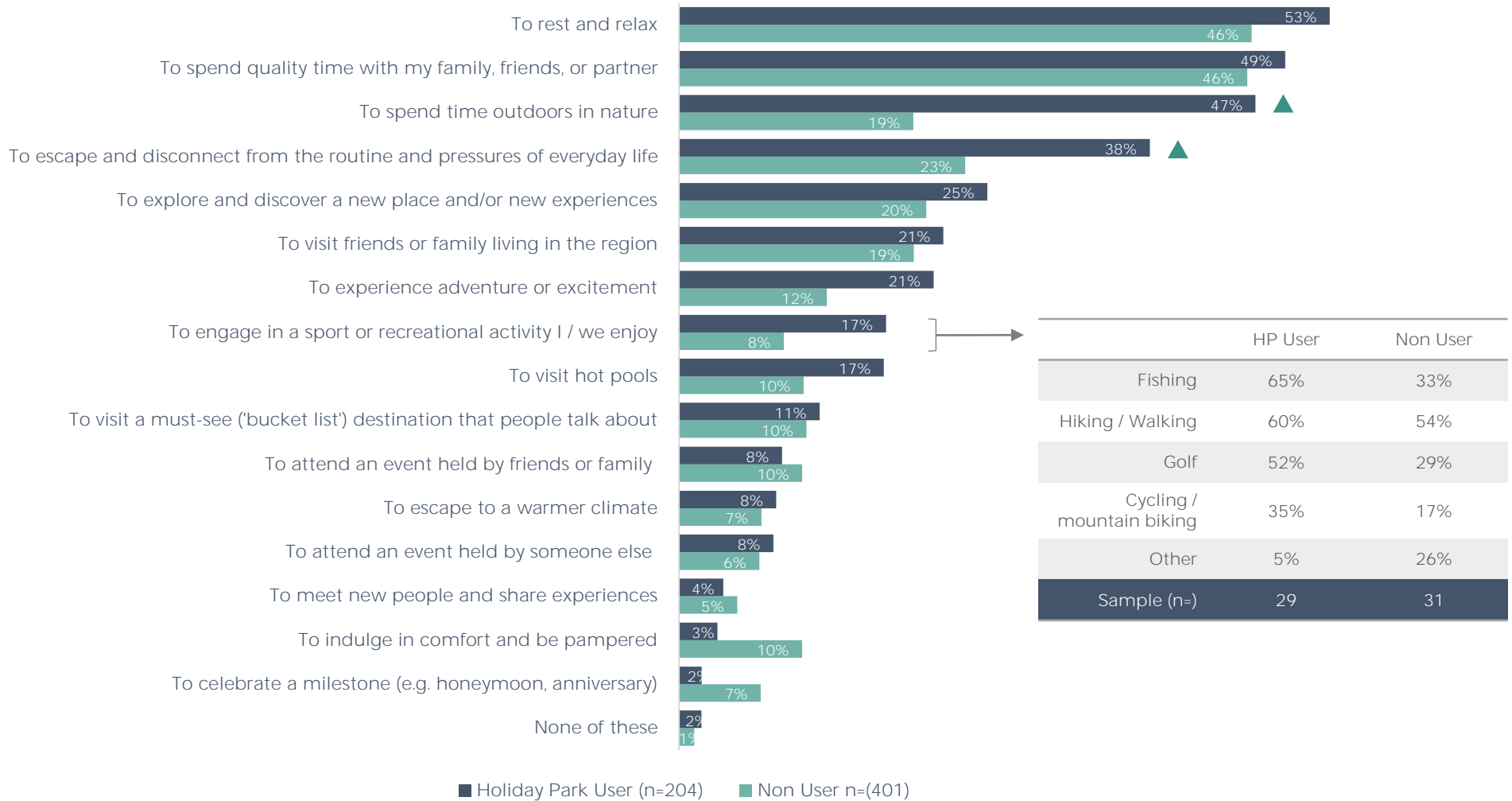
Which region/s did you visit and stay overnight on this [MOST RECENT] trip?



TRAVEL MOTIVATIONS

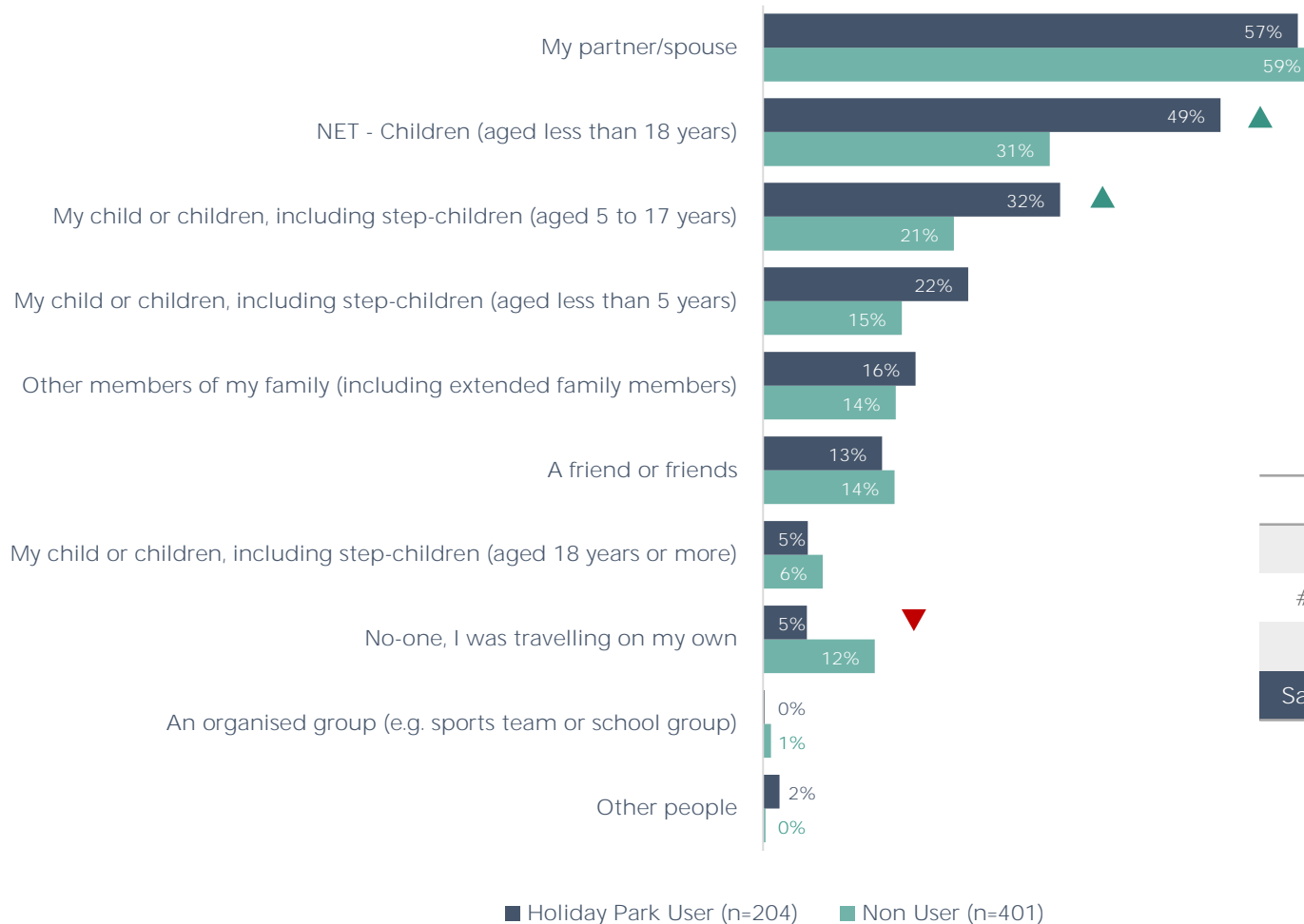
What were your main reasons for wanting to take this [MOST RECENT] trip? (select all that apply)

And which sport or recreational activity was your main reason for wanting to take this [MOST RECENT] trip? (Please select all that apply)



TRAVEL COMPANIONS

Who was travelling with you on this [MOST RECENT] trip? (Please select all that apply)



TRAVEL PARTY SIZE

	HP User	Non User
# Adults	2.78	3.55
# Children	1.15	0.79
# Total	3.93	4.33
Sample (n=)	204	401

LENGTH OF STAY AND TRIP DURATION

How many nights did you spend in a [ACCOMMODATION TYPE] on this trip?
And how many nights did you spend away from home in total on this trip?

NIGHTS IN MAIN ACCOMMODATION

Length of stay (nights)	Holiday Park User	Non User
1	10%	14%
2	22%	29%
3	31%	22%
NET 3 or less	63%	65%
4	6%	9%
5	10%	12%
6	2%	2%
7	6%	2%
NET 7 or less	87%	92%
8	1%	1%
10	1%	2%
More than 10	11%	5%
Base	n=204	n=401

NIGHTS AWAY FROM HOME (TOTAL)

Length of stay (nights)	Holiday Park User	Non User
1	6%	10%
2	16%	27%
3	32%	18%
NET 3 or less	54%	55%
4	7%	10%
5	7%	10%
6	3%	6%
7	8%	5%
NET 7 or less	80%	87%
8	4%	1%
10	1%	1%
More than 10	15%	11%
Base	n=204	n=401

TRAVEL EXPENDITURE

Please estimate how much in total your travel group spent on this [MOST RECENT] trip, taking into account all costs including travel, accommodation, food and drinks and activities for everyone in your travel group.

In the last 12 months, what is your best estimate of the total amount you personally have spent on all your overnight trips (both within NZ and overseas if applicable), including spending for other people on those trips (e.g. partner, children)?

LAST TRIP EXPENDITURE

Trip Expenditure	Holiday Park User	Non User
Less than \$250	5%	5%
\$250 to \$499	19%	12%
NET less than \$500	23%	17%
\$500 to \$749	13%	14%
\$750 to \$999	7%	13%
NET less than \$1,000	43%	44%
\$1,000 to \$1,249	15%	12%
\$1,250 - \$1,499	4%	4%
\$1,500 - \$1,749	5%	5%
\$1,750 - \$1,999	3%	7%
\$2,000 - \$2,249	5%	5%
\$2,250 - \$2,499	2%	2%
\$2,500 - \$2,749	9%	3%
\$2,750 - \$2,999	2%	2%
NET less than \$3,000	88%	82%
\$3,000 - \$3,249	1%	4%
\$3,250 - \$3,499	1%	1%
\$3,500 - \$3,749	1%	2%
\$3,750 - \$3,999	0%	1%
\$4,000 or more	2%	6%
Don't know	7%	4%
Base	n=204	n=401

LAST YEAR TRAVEL EXPENDITURE

Trip Expenditure	Holiday Park User	Non User
Less than \$1,000	26%	18%
\$1,000 to \$1,999	15%	19%
NET less than \$2,000	41%	37%
\$2,000 to \$2,999	9%	13%
\$3,000 to \$4,999	10%	16%
NET less than \$5,000	60%	56%
\$5,000 to \$7,499	7%	11%
\$7,500 to \$9,999	10%	5%
NET less than \$10,000	77%	72%
\$10,000 to \$14,999	9%	5%
\$15,000 to \$19,999	2%	3%
\$20,000 or more	0%	1%
Don't know	12%	8%
Base	n=204	n=401



TRAVEL PLANNING

Websites / Apps Used

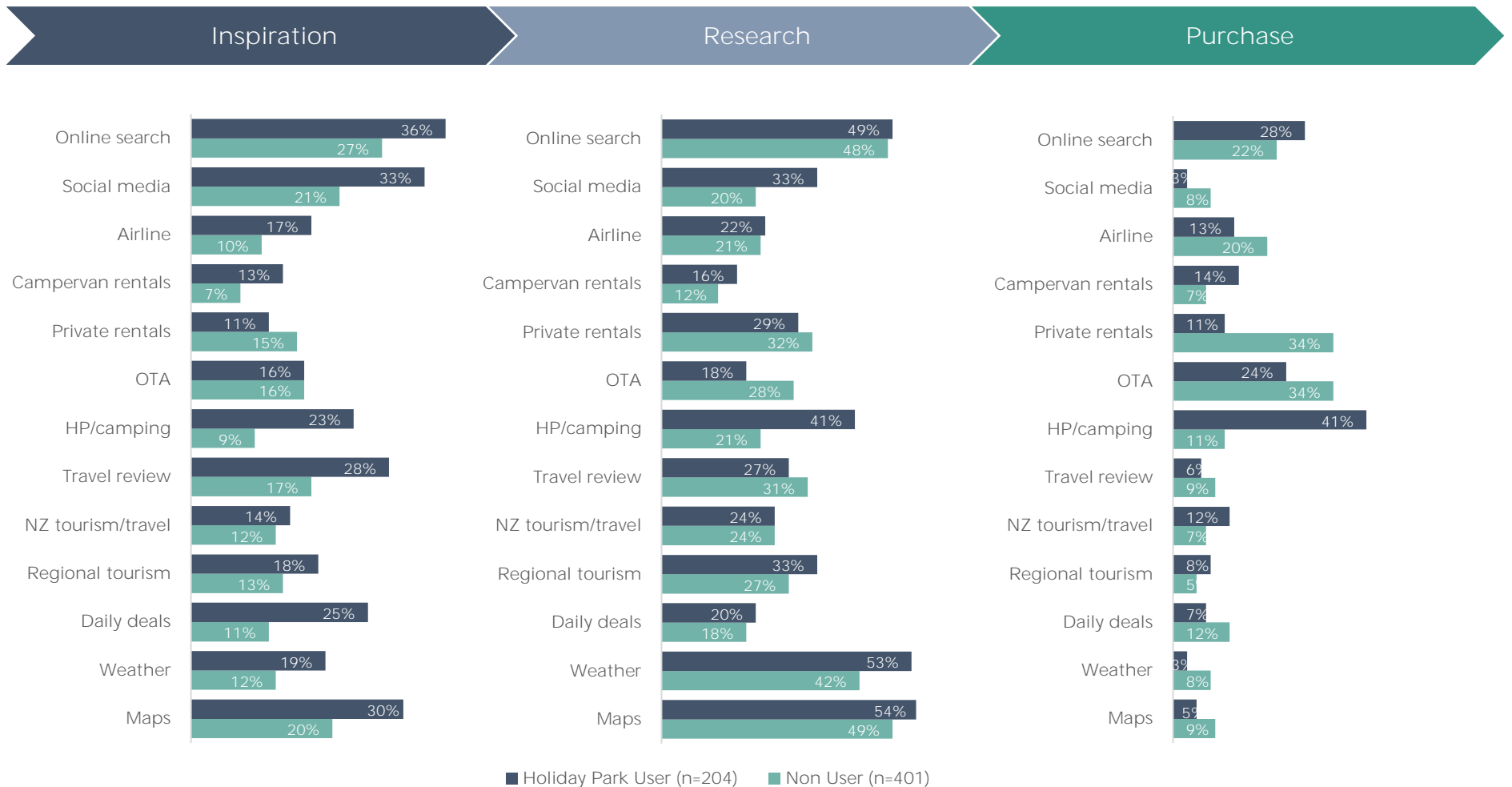
Holiday Park / Camping Websites Used

KEY TAKEAWAYS : TRAVEL PLANNING

- New Zealanders travelling over the summer months use a wide range of websites and apps at different stages of their travel planning process. Most commonly used at each stage were: -
 - For inspiration: online search, social media, travel review and map sites/apps
 - For research: weather, map and online search sites/apps
 - For booking/purchase: holiday park/camping sites/apps (for Holiday Park users) and Online Travel Agent (OTA) and private rental accommodation sites/apps (for users of other accommodation)
- The consumption patterns of Holiday Park users differed most from those of other accommodation users at the 'inspiration' and 'booking/purchase' stages.
- Holiday Park users were much more likely to seek inspiration from map, daily deal, travel review, social media and (not surprisingly) holiday park/camping sites and apps. They were also more likely to purchase via holiday park/camping sites and apps, but also through online search engines, campervan rental sites, and New Zealand tourism/travel sites.
- Amongst those referring to holiday park/camping websites, the most commonly consulted websites - both by Holiday Park users and users of other accommodation - were top10.co.nz, holidayparks.co.nz, nzcamping.co.nz, doc.govt.nz and familyparks.co.nz.

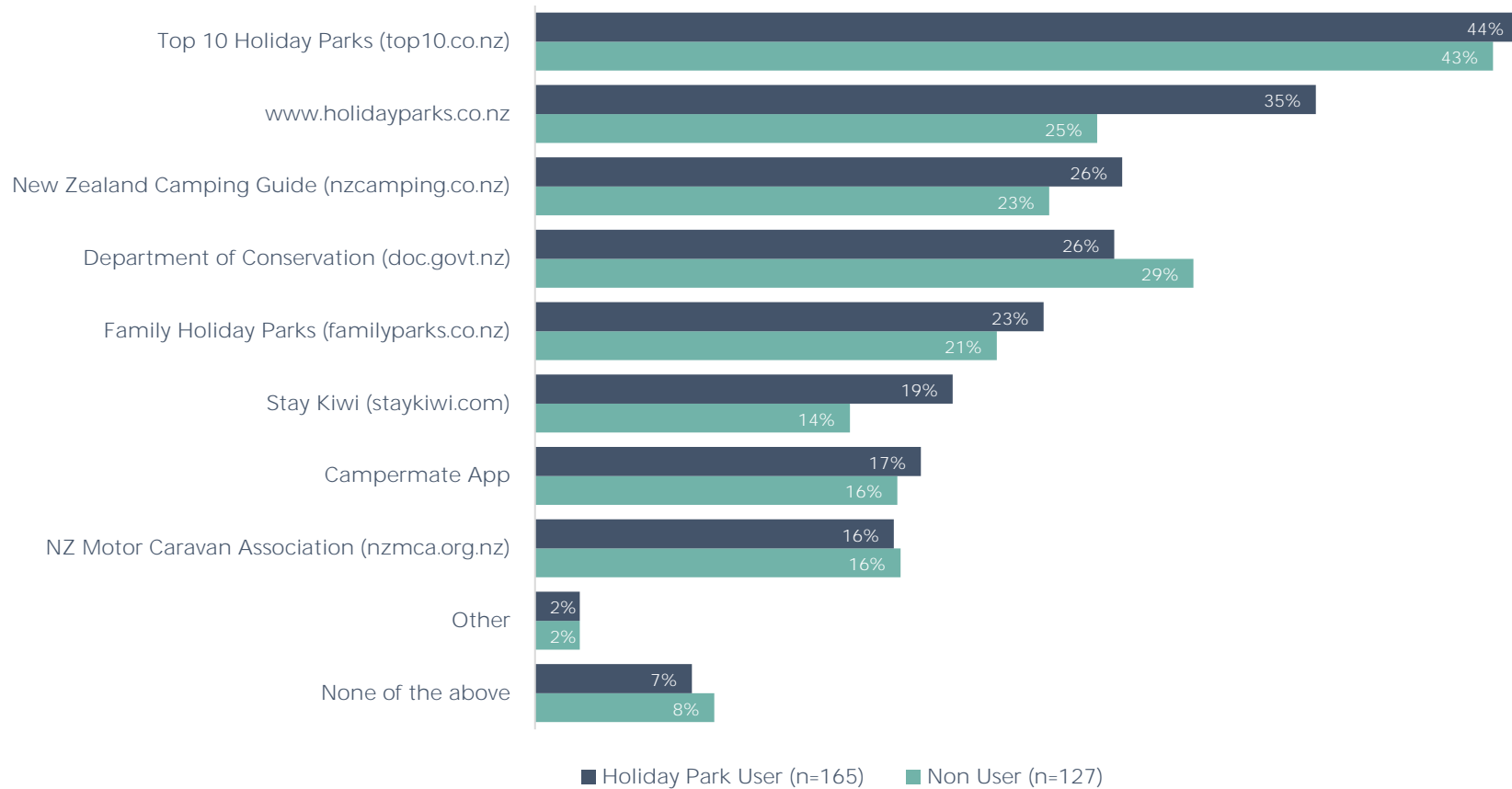
WEBSITES USED

When you were planning this [MOST RECENT] trip, which of the following websites (or apps) did you use at each stage of the planning and booking process? (Select all that apply)



HOLIDAY PARK / CAMPING WEBSITES USED

You mentioned using holiday parks / camping websites or apps when planning this [MOST RECENT] trip. Which specific websites or apps did you use? (Select all that apply)





ACCOMMODATION
CHOICE

Main Accommodation

Prior Holiday Park Experience

Seasonality of Holiday Park Use

Motivations for Accommodation Choice

Satisfaction with Accommodation

KEY TAKEAWAYS : ACCOMMODATION CHOICE

- Holiday Park users comprised 34% of the total research sample, with people staying in hotels/motels/serviced apartments and private rental accommodation making up the majority of the remaining sample (36% and 23% respectively).
- The most common types of accommodation used by Holiday Park users were non-powered sites (staying in a tent), powered sites (staying in a caravan), powered sites (staying in a tent), standard cabins and kitchen cabins. Around one-in-ten Holiday Park users was staying in a campervan, the majority of these on a powered site.
- Almost one-in-ten Holiday Park users were staying at a Holiday Park for the first time over summer 2021/22. Thirty percent indicated that they stayed at a Holiday Park at least once a year.
- Of the 'non-user' group, 25% indicated they had stayed at a Holiday Park on at least one previous occasion although most of this group now did so only occasionally.
- Not surprisingly, December and January are the peak months for holiday park use although patronage is also strong in February. Likely corresponding with school holiday periods, there are also 'peaks' in use throughout the year – in April, July and October.
- Motivations for choice of accommodation vary significantly by accommodation type. For Holiday Park users, the desire to be 'in the outdoors' and to enjoy the summer weather is a key motivating factor, along with the suitability for family (being 'family-friendly') and previous experience staying there. These are also key differentiators for holiday parks.

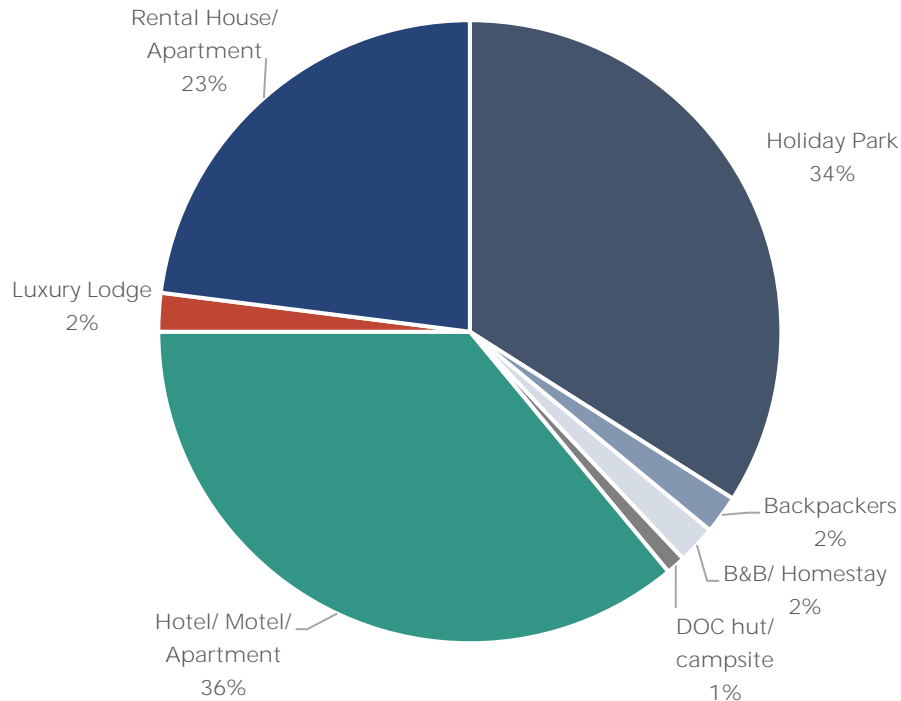
Also important in choice of accommodation for Holiday Park users are location and price/value for money.

- For those staying in hotels/motels/serviced apartments, simple availability of accommodation is a key reason given for choice of accommodation. Also important are location, price and overall value for money.
- Perceived value for money is the most common reason given for choice of private rental accommodation (given as one of the 'top 3' factors by 42% of those choosing this form of accommodation). Location is also an important factor.
- While satisfaction with the accommodation chosen is almost universal regardless of accommodation type, Holiday Park users express slightly higher levels of satisfaction with their accommodation overall. An impressive 91% of Holiday Park users consider themselves extremely or very satisfied, compared with 85% of those choosing other forms of accommodation.

MAIN ACCOMMODATION

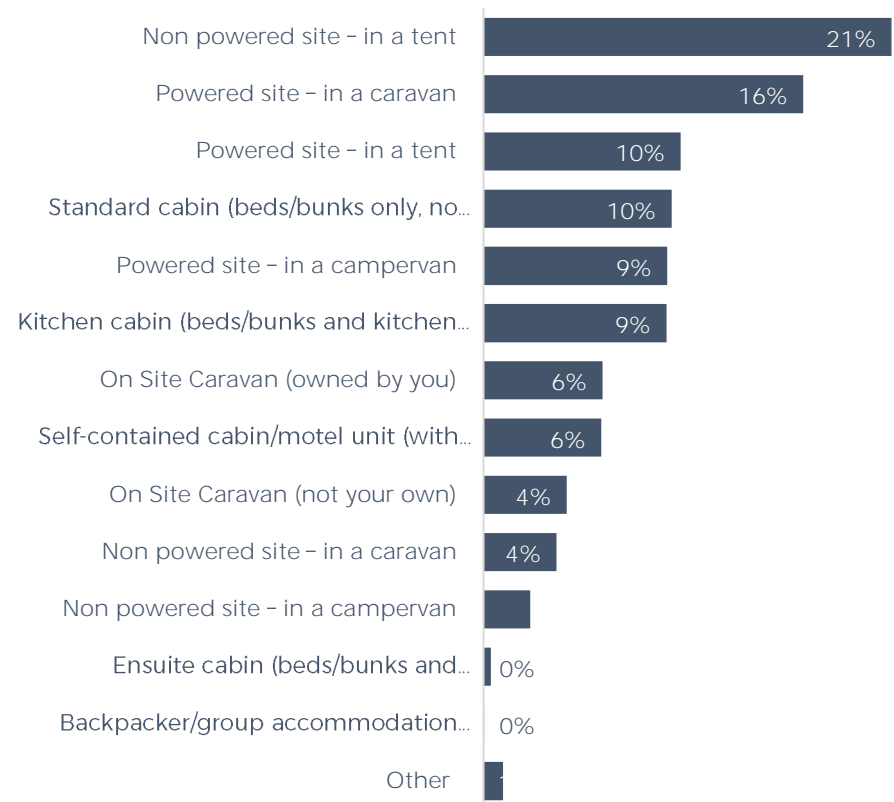
What was the **main** type of accommodation you stayed in on the **most recent** trip you've taken since 18 December 2021?
Which of these options best describes the type of accommodation you stayed in at the holiday park / camping ground?

MAIN ACCOMMODATION



Base : All Respondents (n=605)

HOLIDAY PARK ACCOMMODATION



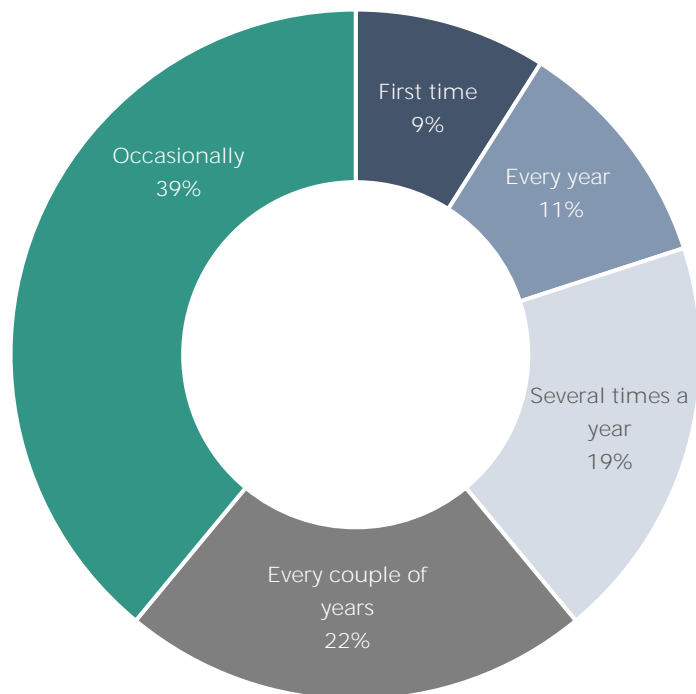
Base : Holiday Park Users (n=204)

PRIOR HOLIDAY PARK EXPERIENCE

Which statement best describes how often you stay in holiday parks / camping grounds?

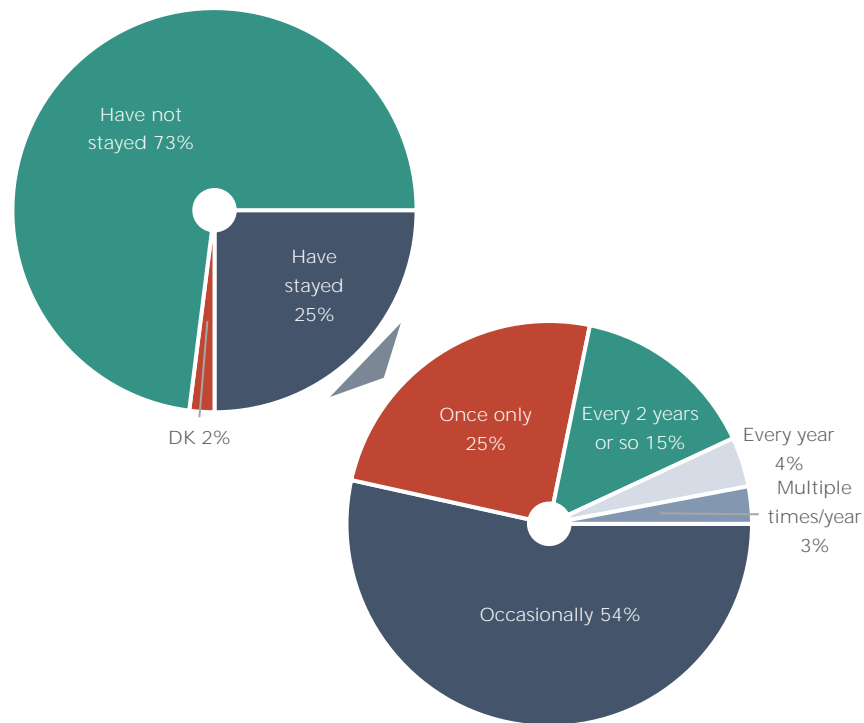
What month/s of the year have you ever stayed in a holiday parks / camping grounds in New Zealand (as best you can remember)?

PRIOR EXPERIENCE
(HOLIDAY PARK USERS)



Base : Holiday Park Users (n=204)

PRIOR EXPERIENCE
(NON-USERS)

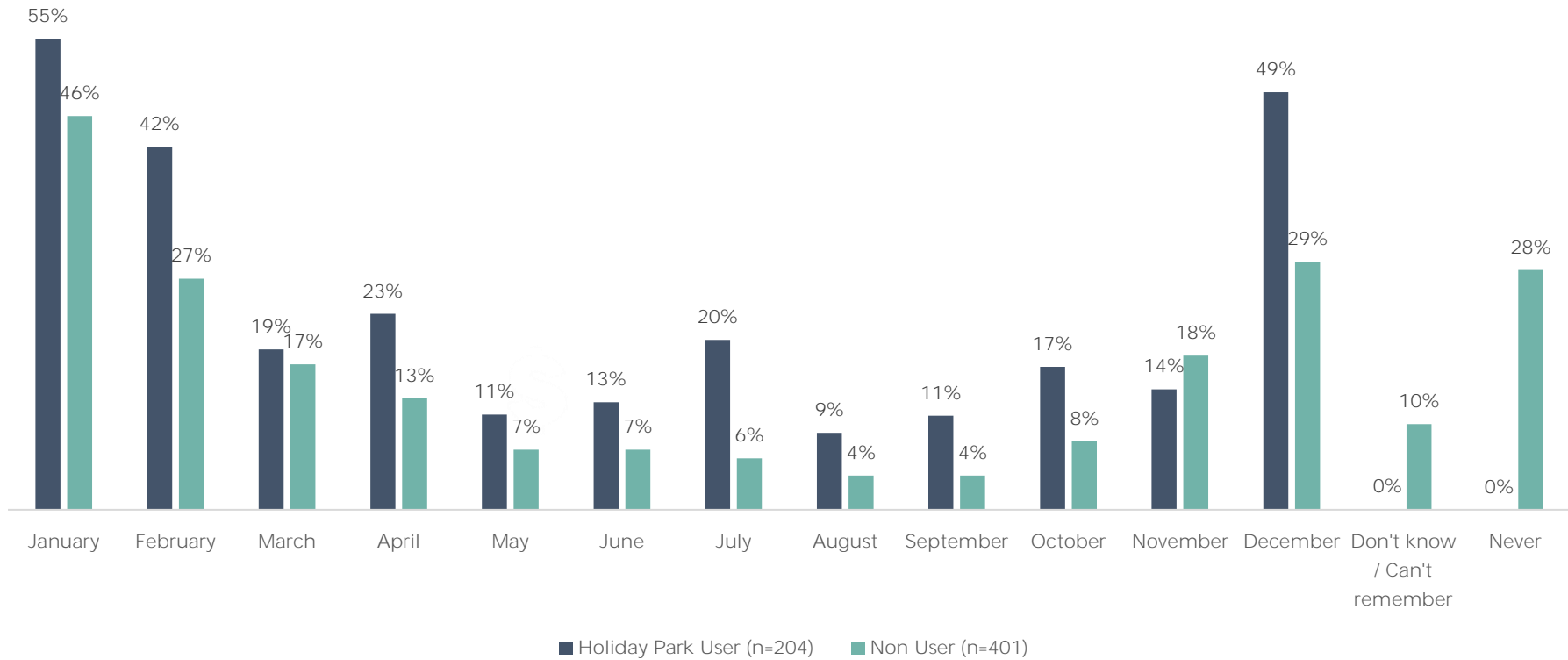


Base : Non-Users (n=401)

SEASONALITY OF HOLIDAY PARK USE

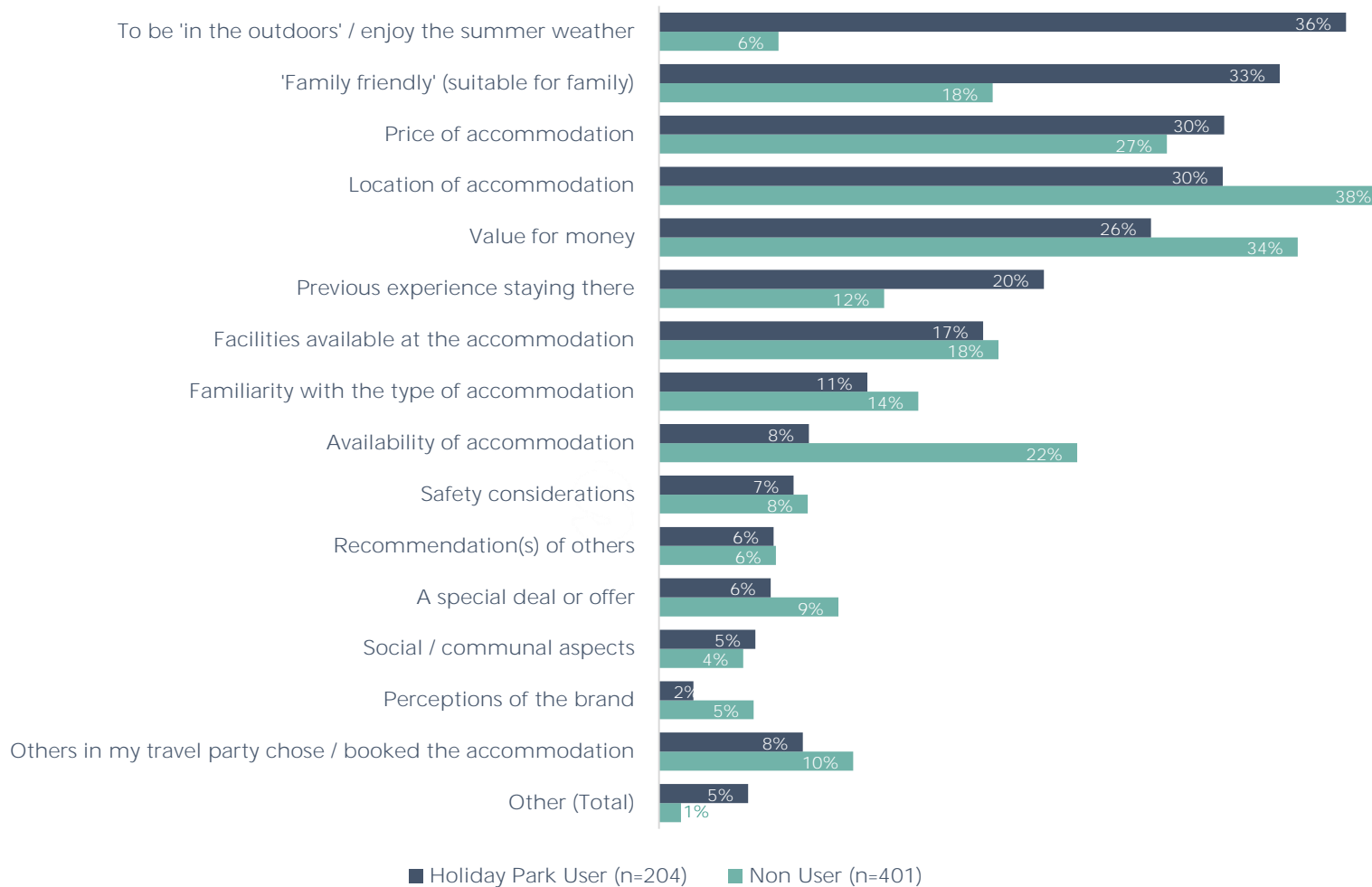
Which statement best describes how often you stay in holiday parks / camping grounds?

What month/s of the year have you ever stayed in a holiday parks / camping grounds in New Zealand (as best you can remember)?



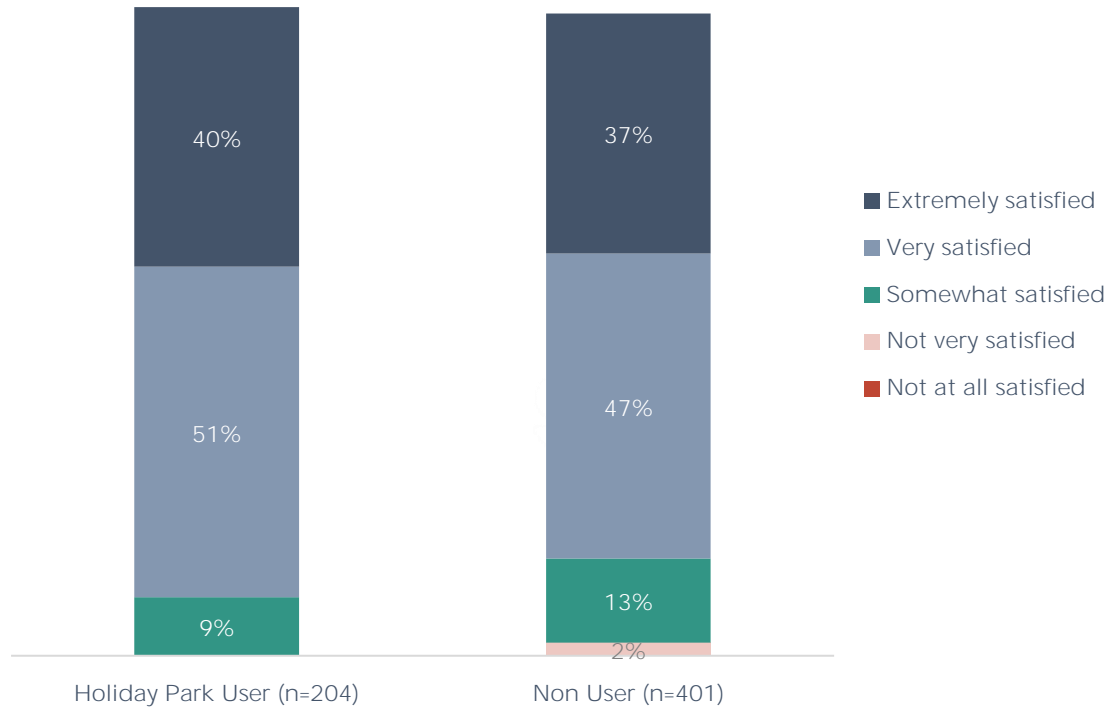
MOTIVATIONS FOR ACCOMMODATION CHOICE

What were your main reasons for booking (accommodation type over other types of accommodation? (Please select up to three reasons below).



SATISFACTION WITH ACCOMMODATION

How would you rate your overall satisfaction with your stay in a [ACCOMMODATION TYPE] on this trip?





PERSPECTIVES
ON
HOLIDAY
PARKS
- PARK USERS

What Users Enjoy Most

What Users Don't Enjoy

COVID-19 Precautions

Improving COVID-19 Safety Measures

KEY TAKEAWAYS : PERSPECTIVES ON HOLIDAY PARKS – PARK USERS

- Users enjoy many things about staying in holiday parks/camping grounds, including the opportunity to “get away from it all” and to experience life at its most relaxed, free of constraints and the rules and routines of everyday life. Holiday parks provide for relaxed time with friends and family in a sociable atmosphere. Many also offer a good choice and variety of facilities and activities, a family-friendly vibe and all at a good price and in an appealing location.
- While many holiday park users struggle to think of disadvantages, what criticisms there are centre on overcrowding, the behaviour of other guests, poor or poorly maintained facilities, concerns about pricing, poor weather or the presence of insects.
- People staying in holiday parks over summer 2021/22 noted a range of COVID-19 safety precautions in place: most often a requirement for guests to be vaccinated, the presence of QR codes/registers for contact tracing purposes, the requirement for guests to wear face coverings in communal facilities, and the provision of hand sanitiser in communal facilities for guests to use.
- Overall, park users expressed very high levels of satisfaction with the precautions taken to keep guests safe from COVID-19 during their stay at a park over summer: 86% of guests indicated that the park had managed this ‘extremely’ or ‘very’ well.
- Where there were criticisms or suggestions for improvement, these tended to focus on greater enforcement of mask-wearing, more rigorous checking of vaccine passes, ensuring greater adherence to social distancing and a more rigid cleaning and sanitising regime.

HOLIDAY PARKS – WHAT USERS ENJOY MOST

Based on your recent trip and any other previous experience, what (if anything) do you enjoy most about staying at holiday parks / camping grounds?

Users enjoy many things about staying in holiday parks / camping grounds and, for many users, Holiday Parks are their first and only choice of accommodation type. A stay at a Holiday Park can offer -

- An opportunity to get away from it all; freedom, the simple life, peace, and quiet, fresh air and being in nature.
- Quality time with friends and family.
- A sociable, pleasant, and relaxed atmosphere.
- An environment that is family-friendly.
- Many offer a good choice and variety of facilities and activities.
- Price / value for money.
- Good location.
- New experiences.

Many users describe the sense of freedom they feel from **getting away from it all** and enjoying a simpler and less stressful time out from their typically busy lives. This is enhanced by being in nature and the fresh air and going back to the basics. Users' spirits are uplifted, and their minds and bodies relaxed from living, cooking, and sleeping in the open air, in scenic surroundings.

It is simple, back to the basics, and makes you appreciate your home more when you go home.

Freedom includes being in charge of their own destiny; making their own arrangements, choosing to camp almost anywhere, and deciding where to go and how long to stay.

HOLIDAY PARKS – WHAT USERS ENJOY MOST [CONT.]

Staying in holiday parks / camping grounds provides ample opportunity to spend **quality time with friends and family**. For those with children, camping is an adventure where they get to see and do different activities to those they would do at home. Cooking and eating together and having fun without the distractions of 'normal' life and devices is meaningful and creates memories.

Spending fun times with family and friends means a lot to me, being in the moment and being present.

Users enjoy the ambience and atmosphere at holiday parks / camping grounds, which they variously describe as sociable, laid back, friendly, relaxed, fun, cool, safe, and 'easy'. There is an almost intangible positive feeling or vibe generated by being in the outdoors, scenic surroundings and being among other likeminded people. There is also a 'tacit' acceptance of individual choices and freedoms regarding how they spend their time and whether they socialise or not. For some, the opportunity to mix and make new friends is a very important part of the holiday park / camping experience, while others prefer to keep to themselves.

Friendly and mixing with other people.

For those with children, **the family-friendly atmosphere, facilities and activities** are a major drawcard. Holiday parks / camping grounds offer the opportunity for children to play and explore, to meet other children and to experience freedoms they might not do at home, in a safe environment.

Lots of other families and other kids for my kids to play with, safe environment

Another important determinant of enjoyment for users is the quality and **choice of activities and facilities on offer**. Their experiences are enhanced by having access to ample clean facilities which are typically in good working order. Specifically, bathroom and toileting and kitchen facilities, charging points, rubbish collection points and a laundry. Friendly, approachable, and knowledgeable staff are also appreciated.

Users praise clean, safe, and well-maintained playground equipment, games rooms, swimming pools and plenty of green, open space for playing and mingling.

The pool, the kids look after themselves, everyone's friendly.

Holiday parks / camping grounds can **offer great prices and good value for money**, especially for those who take advantage of the range of activities and facilities on offer and eat / socialise on site, as this avoids additional spending. Access to the beach or other local (free) attractions also help to keep the lid on overall spending.

That it is cheap, a good way of socialising.

HOLIDAY PARKS – WHAT USERS ENJOY MOST [CONT.]

Holiday parks / camping grounds are often chosen because of their **good location**. For example, their close proximity to the beach, local town, shops and food provisions. Also, for easy access to facilities/activities which enable users to participate in their preferred hobbies or past times. For example, the beach, boat ramps, nature, wildlife, rivers and fishing spots, sights, and excursions.

Close to beach for boat, jet ski, fishing & diving. Wildlife all round good experience for adults and children.

Some users had wanted to engage in a **new experience** for themselves or others, either in a new location or in a different type of accommodation.

This was to provide a good experience for someone who has never camped before, and we had to take a pet dog.

HOLIDAY PARKS - WHAT USERS ENJOY MOST [CONT.]

The facilities and grounds were tidy. All the people who were staying within the holiday park were respectful and quite late at night. There were heaps of things to do at the holiday park.

I enjoy being out in nature but with easily accessible facilities. I enjoy meeting new people and the relaxing environment.

*It's exciting, cooking food in a camper van, watching it get dark, when it is dark relaxing as a family and then **all going to sleep as a family***

Wow a cafe right on site, which was wonderful! AND they catered for dairy free diets as well, that was amazing. located right near the cycle track, lovely environment, and camp.

The kids love it - they have made lots of friends and there are some many things for them to do so the parents get a bit of a break too.

It was a good experience.

It's affordable, they have playgrounds for kids..

I enjoy the close proximity to the beach. we can take a short walk from our campsite, over the sand dunes and be on a stunning beach

It had great facilities, was nice to be surrounded by nature, very good value for money.

Freedom to come and go. Be alone or mix with others.

It had great facilities, was nice to be surrounded by nature, very good value for money.

HOLIDAY PARKS – WHAT USERS DON'T ENJOY

And, what (if anything) do you not enjoy most staying at holiday parks / camping grounds?

Many users can think of no disadvantages to staying in a holiday park / camping ground; they '*love everything about it*' and are willing to overlook or accept some of the criticisms others make, namely:

- Overcrowding.
- Other guests; noisy and disrespectful.
- Shared / communal facilities.
- Poor, outdated, insufficient, poorly maintained, dirty or closed facilities.
- Showering and toileting facilities.
- Poor location.
- Price.
- Weather / insects.

Some respondents are critical of overcrowding and being in too close proximity to other families during the busiest times of the year.

Being in a busy and overcrowded environment can undermine a key reason for camping, which is the peace and quiet and the opportunity to get away from it all. Noisy and rowdy guests, who stay up late and play loud music can ruin the peaceful camping dynamic.

Also frustrating are disrespectful guests, who are rude, do not follow rules and who leave their children unsupervised. Some respondents have not felt safe among gang members and unruly drunken groups.

Free range parents that let their kids bully other kids.

Loud and drunk people troubling others.

HOLIDAY PARKS – WHAT USERS DON'T ENJOY [CONT.]

Conversely, several users had been disappointed by the lack of guests and limited opportunities for social interactions.

The lack of gatherings with other holidaymakers.

Some users disliked using and waiting to use shared or communal facilities and this is exacerbated during busy times. They are also critical of dirty or unhygienic facilities, again made worse during busy times and by guests who do not clean up after themselves.

Sometimes facilities aren't as clean as I would like.

Having to share facilities, sometimes they're not very clean.

Sometimes **facilities** are small, poor quality, outdated and poorly maintained. At other times facilities have been closed, damaged or not working to a reasonable standard, which undermines users' perceptions of value for money and one of the main reasons for choosing a holiday park which is the range and choice of facilities available.

TV rooms, social rooms, & kitchens, all closed & locked.

Most camps are older from 70's and not updated.

Users are most critical of poor showering and toileting facilities; insufficient facilities for the number of guests staying, poor hygiene standards and a lack of hot water are frustrating and ruin users' enjoyment.

Toilets & Shower facilities are always poor.

Waiting for shower and not enough room in fridge.

Adding to users' frustrations is when their complaints are not taken seriously by staff who are disinterested and impersonal.

While factors such as closed or poor amenities / facilities mean that some holiday parks / camping grounds are not as good value for money as users expected, some feel the price per se is too expensive and this makes other accommodation options more attractive.

(Name) camping grounds were insanely expensive - \$30 per person for a non-powered site. Ridiculous!

Some users had stayed at holiday parks / camping grounds which were further away from facilities and amenities than they had realised, while others cited poor weather and the annoying presence of 'bugs' which had lessened their enjoyment.

HOLIDAY PARKS - WHAT USERS DON'T ENJOY [CONT.]

It is generally only the weather that ruins camping, otherwise I enjoy all aspects of it

When it's crowded with crying kids, and rowdy teenagers or gang people.

I dislike that I was unaware of a festival and the other guests were loud after quiet hours

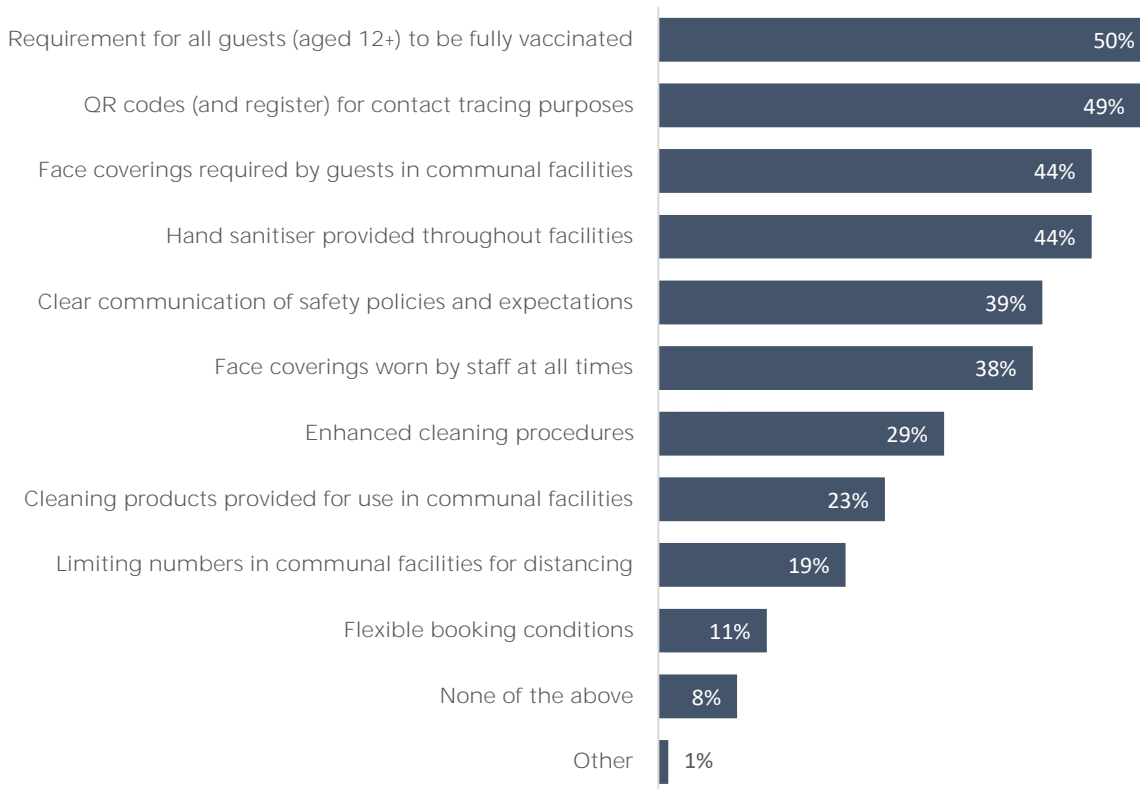
The campsite area for our tent and gazebo was very small, there was no room for our vehicle, we had to leave it & the trailer out on the road which wasn't ideal. I prefer doc campgrounds but because we had a dog with us this wasn't possible this time.

Rates are getting quite high and actual motel accommodation would be a better option if this continues.

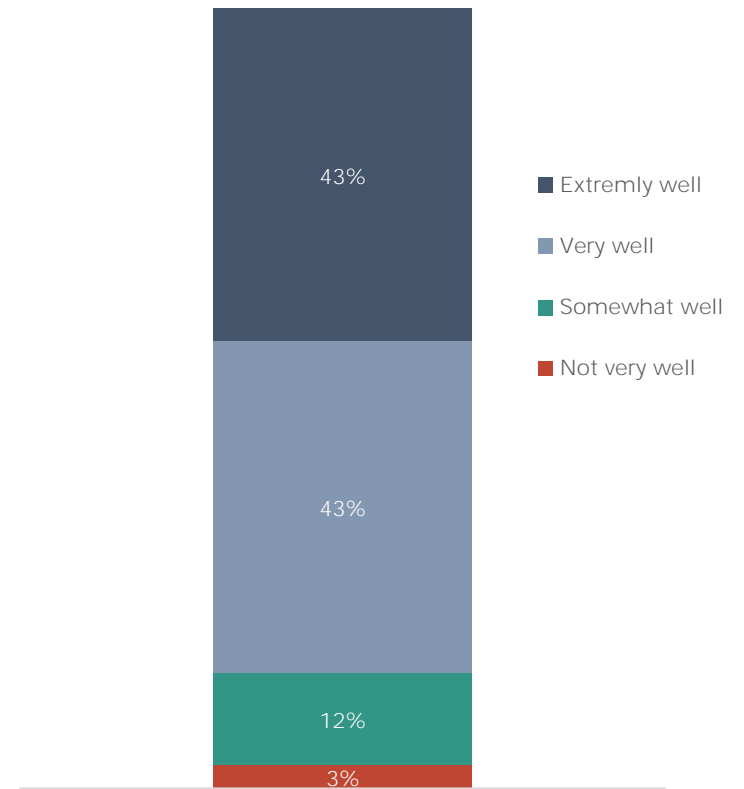
COVID-19 PRECAUTIONS

What Covid-19 precautions did the holiday park / camping ground take to keep you safe during your stay? (Select all that apply)
 How well do you feel the holiday park / camping ground managed Covid-19 safety policies and procedures to keep you safe during your stay?

PRECAUTIONS OBSERVED



RATING OF POLICIES & PROCEDURES



IMPROVING COVID-19 SAFETY MEASURES

Do you have any comments regarding Covid-19 safety precautions at the holiday park / camping ground? What, if anything, would have helped you to feel more confident during your stay?

Overall, respondents were impressed by the way holiday parks / camping grounds have managed COVID-19 safety policies and procedures. The general sentiment was that they had done a good job or the best they could under the circumstances. However, several challenged the requirement for COVID-19 safety policies and procedures and the inconsistency with which these were enforced.

A minority of respondents felt that COVID procedures were not managed or enforced as strictly as they should have been. They would have liked to have seen more people wearing face masks, more checking of vaccine passes, social distancing and a more rigid cleaning and sanitising regime.

I was pretty impressed with their procedures in place. They gave us waterproof wristbands to show we were double vaxxed and authorised to be on the property, and no visitors were allowed to minimise the people on site.

They had all precautions in place and all the campers were following all of the precautions which made it a lot safer

No, was a great facility, always clean and encouraging face masks, hand sanitizer

Top 10 camping sites manage safety precautions extremely well.

I don't think the rules make sense at doc sites, fully vaccinated to stay, but day visitors don't need to be vaccinated and can use the toilets, I think if you are going to catch covid the toilets from surface transfer toilets would be the place you would catch it, people are generally about and during the day so doesn't make sense at all.

The fact they weren't strict was amazing, the only thing that could've gone worse was actually practicing the bullshit rules.

Often, we were the only ones wearing masks in communal areas, it wasn't well enforced

No vaccine pass was checked, no one watching to see how many people were in communal areas etc

Other campers lack of adherence to protocols

IMPROVING COVID-19 SAFETY MEASURES [CONT.]

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PERSPECTIVES
ON
HOLIDAY
PARKS
- NON-USERS

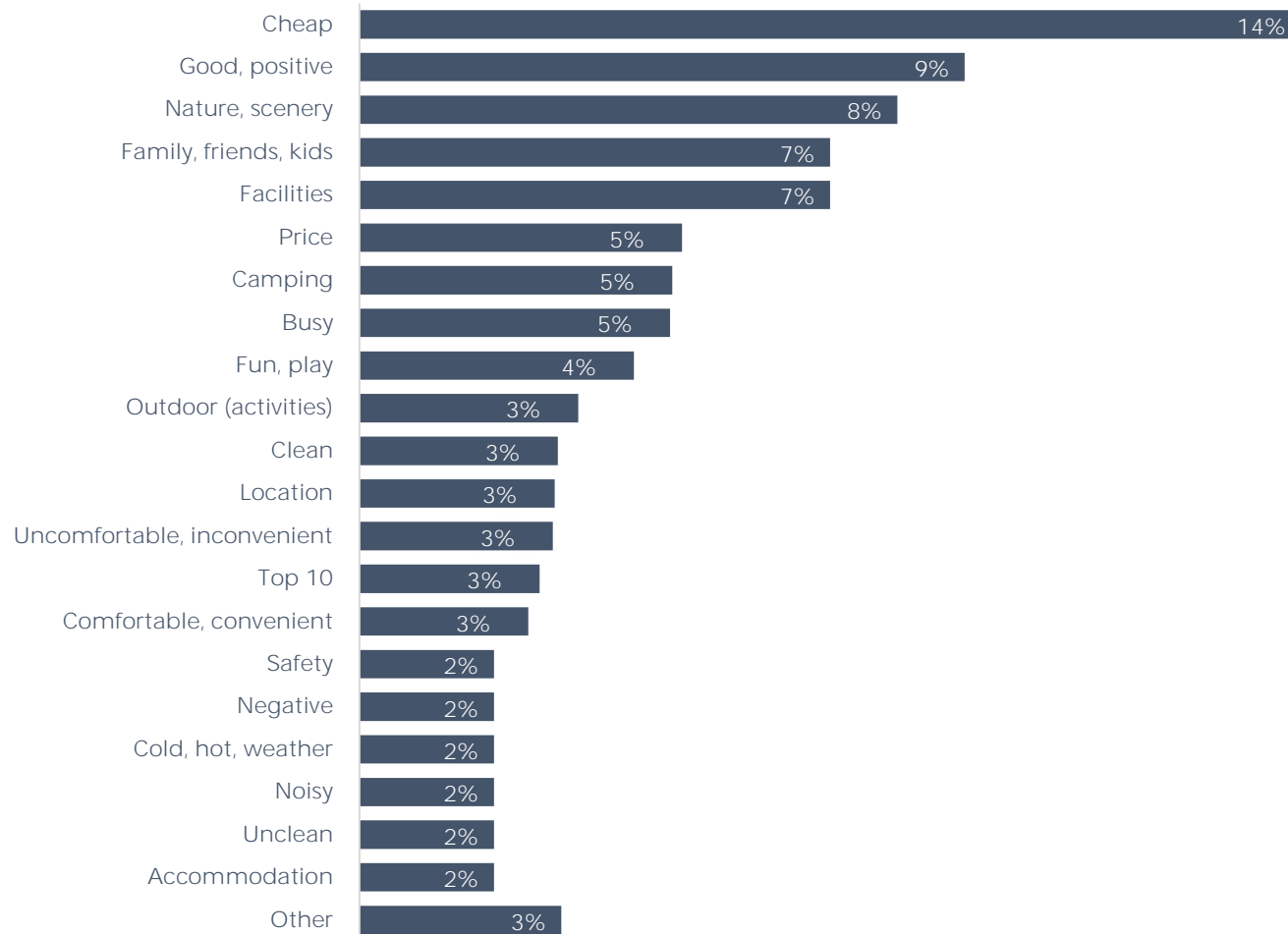
Top-of-Mind Associations
Barriers to Use of Holiday Parks

KEY TAKEAWAYS : PERSPECTIVES ON HOLIDAY PARKS – NON USERS

- The most common 'top-of-mind' association with Holiday Parks is 'cheap', suggesting that price may not be a barrier (although perceived value for money could be if the relationship between price and quality of product/service is seen to be out of kilter).
- Other top-of-mind associations are generally positive - including an association with nature/scenery, families and children, fun and outdoor experiences - although there are some negative associations apparent too (noisy, unclean, and uncomfortable, for example).
- One quarter of 'non users' had considered staying at a Holiday Park on their most recent trip but had chosen an alternative form of accommodation.
- Amongst non users as a whole, the main barriers to choice of Holiday Park accommodation on that occasion were perceptions of quality (when compared with alternatives such as hotels, motels and private rented accommodation) and a perceived lack of privacy. Other non users expressed concerns about noise, personal safety, discomfort (especially in the event of bad weather), and an aversion to sharing communal facilities.

TOP-OF-MIND ASSOCIATIONS

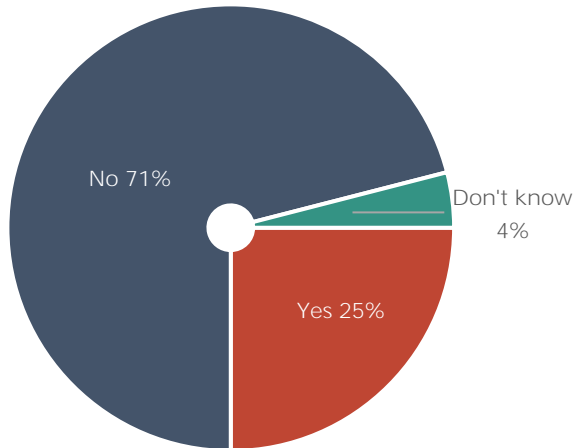
What are the first three things that come to mind when you think about holiday park / camping ground accommodation in New Zealand?



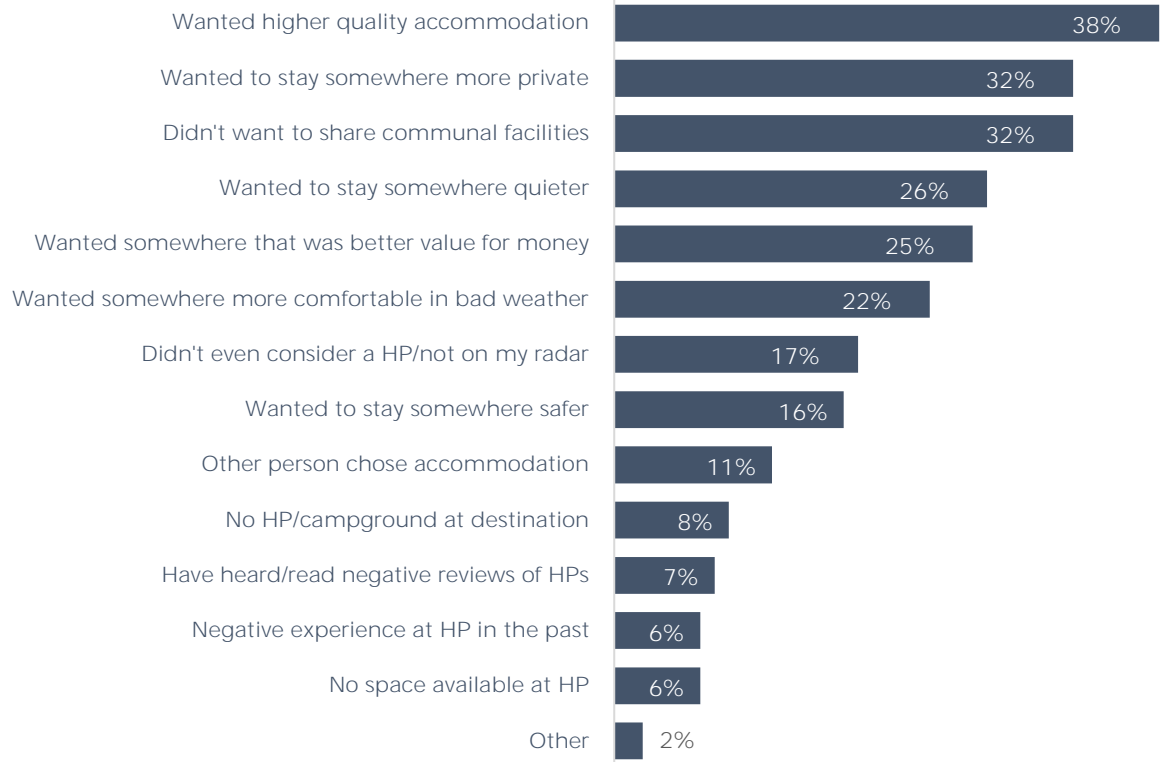
BARRIERS TO USE OF HOLIDAY PARKS

When planning this recent trip, did you consider staying in a holiday park / camping ground instead of a [ACCOMMODATION TYPE]?
 For what reason/s did you choose to stay in a [ACCOMMODATION TYPE] rather than a holiday park / camping ground on this recent trip? (Select all that apply)

CONSIDERED STAYING AT A HOLIDAY PARK



REASONS FOR CHOOSING ANOTHER OPTION





FUTURE USE
OF
HOLIDAY
PARKS

Likelihood of Staying at a Holiday Park (Next 2 Years)

Barriers to Future Use

Prompts for Off-Peak Travel

Activating Off-Peak Travel

KEY TAKEAWAYS : FUTURE USE OF HOLIDAY PARKS

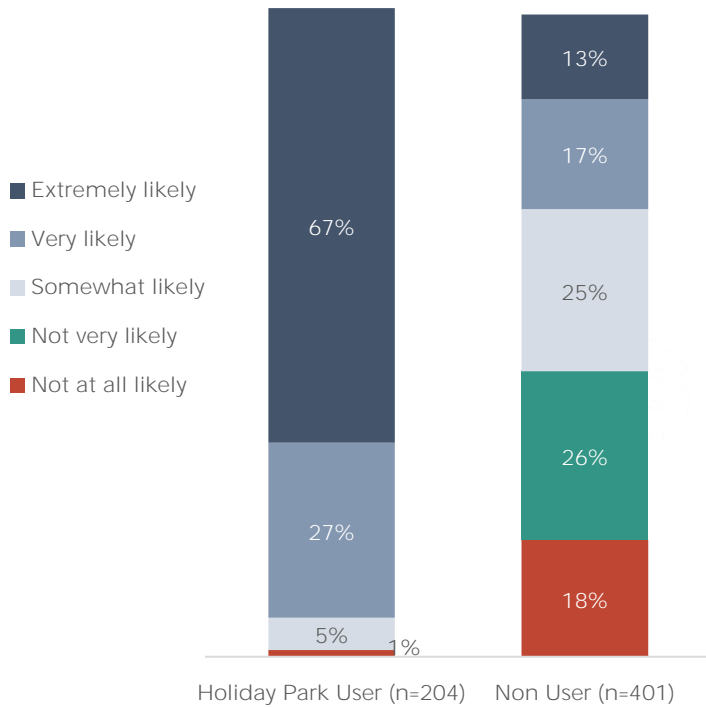
- Almost all Holiday Park users, and more than half of non users, indicated that they were likely to stay at a holiday park (again) in the next two years.
- Given current patterns of seasonality - with business heavily concentrated in the months of December/January - it is encouraging to note that many domestic visitors (and especially those who have stayed at a holiday park recently) are also open to staying over the shoulder and off-peak months. There is also a good quarter of this group who would consider staying at a holiday park over the mid-winter months.
- Barriers to future use of holiday parks centre on dislike of shared facilities, or of camping per se, or on perceptions of holiday parks as 'uncomfortable'. Poor experiences in the past - of noise, or the unsociable behaviour of other guests - also prove off-putting to some.
- Survey feedback indicates that 'deals' are most likely to activate off-peak travel (noting that a 'deal' is not necessarily a price discount but could be an upgrade or other value-add).
- Access to hot pools is another major drawcard for off-peak travel (and suggests good opportunities for packaging holiday park accommodation with a growing range of hot pool facilities around the country).
- Packaging holiday park accommodation with other activities - such as a cycling, fishing, hiking/walking - or access to popular attractions, also shows good potential to activate the market (and especially those who haven't stayed in a holiday park recently). For non users, holiday park-run events or 'how to' information sessions / classes, also appear to be good ways of activating off-peak season travel.



LIKELIHOOD OF STAYING AT A HOLIDAY PARK [NEXT 2 YEARS]

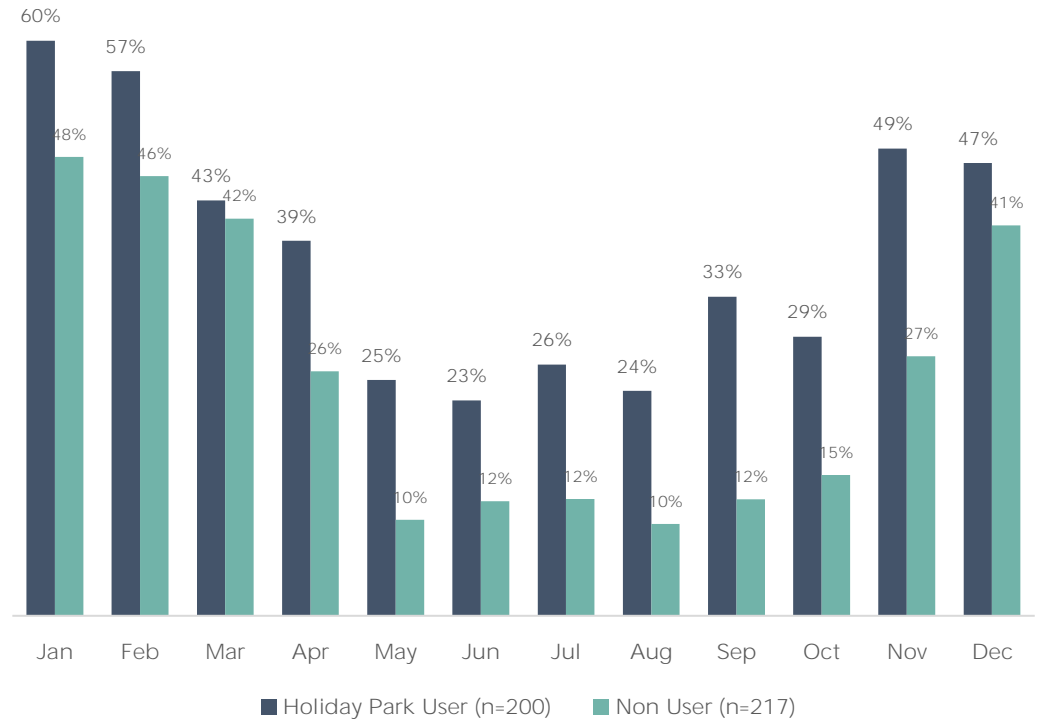
How likely are you to stay in a holiday park / camping ground in New Zealand within the next two years?
 What month/s of the year would you consider staying in a holiday park / camping ground in New Zealand?

LIKELIHOOD OF STAYING AT A HOLIDAY PARK (NEXT 2 YEARS)



Base : All Respondents

MONTHS WOULD CONSIDER STAYING AT A HOLIDAY PARK



Base : Likely to Stay at a Holiday Park (Next 2 Years)

BARRIERS TO FUTURE USE

You mentioned that you are not likely to stay in a holiday park / camping ground in New Zealand within the next two years. Why is that?

The main reasons holiday makers are unlikely to stay in a holiday park / camping ground in the next two years are:

- They dislike shared facilities (some due to COVID-19 concerns)
- They dislike the idea / concept of camping (and holiday parks)
- They find holiday parks uncomfortable
- They prefer other types of accommodation
- They've had poor experiences in the past
- They have questions about value for money.

Some people are put off holiday parks / camping because they do not want to use communal facilities and they prefer accommodation which is self-contained and offers a higher degree of privacy.

Not self-contained with own cooking or bathroom facilities. Too many people and noise.

Five respondents mentioned COVID-19 specifically. For these people, shared and communal facilities are not an attractive or safe option with COVID-19 in the community.

There is a perception amongst some that holiday parks / camping grounds are uncomfortable. While some people are seeking a simpler, back-to-basics holiday, others want and expect a level of comfort and luxury sometimes over and above that experienced in their normal everyday lives.

We are retired and enjoy a few more comforts than a camping ground

Some past users of holiday parks believe they have now reached a time in their life where their health and/or wealth means they can choose not to stay in holiday parks or camping grounds. They have simply “moved on” from holiday parks.

BARRIERS TO FUTURE USE [CONT.]

Some believe holiday parks / camping grounds are more for families or groups of friends, while some of those with families prefer private and self-contained accommodation.

I was with my friends when I stayed in holiday parks 10 years back. Now that I have a family, I need somewhere which is private and we have our own kitchen and bathroom.

Some people simply dislike the idea or notion of camping or even staying in another type of accommodation in a holiday park. Some describe it as “not their thing” or “not their style” and these types of holidays hold no appeal or interest for them; preferring instead other forms of accommodation.

Too out of my comfort zone / Not my type of thing - not on my radar / It's not my style.

I mostly holiday with my daughter and family and she prefers high-end accommodation.

Several people mentioned **poor previous experiences** and memories of holiday parks / camping grounds, which had put them off staying in future. Typically they disliked noise, crowding and shared facilities and the lack of standardisation across the sector. Some also recalled bad experiences with other guests.

Don't like them. Too noisy, too many kids, annoying people, communal facilities which often aren't very clean. I like my privacy.

Had terrible past experience, drunk people shouting all night, fights, police arrival, dirty facilities

Some people do not perceive holiday parks / camping grounds as good value for money and feel that other types of accommodation are becoming more competitive and have the added bonus of private facilities.

Too expensive for what you get. Motels more comfortable and provide more and are often much closer to main centres.

Other barriers relate to location (holiday parks are not always in the locations where people want to stay, especially in urban or metropolitan areas), opportunity to take holidays, or lack of the right equipment,

One respondent was unable to stay at a holiday park / camping ground because they were unvaccinated.

Because I have to be vaccinated apparently and I'm not. I was going to buy a caravan and park it up permanently as a rental for when I wanted to have a holiday, but I read I have to be vaccinated, so that's the end of that dream!

BARRIERS TO FUTURE USE [CONT.]

Prefer more comfortable accommodations like holiday homes rather than camping grounds because it is more private and secure.

They are noisy, I don't like communal facilities, I don't feel safe, and spread of germs

It is something that has never been on the radar for me. Camping would be my worst nightmare come true.

We have an abundance of quality hotels in the locations I like to visit and have no intention of sacrificing that for a tent. I like the convenience of a hotel and the facilities on offer, the proximity to the things we like to do and explore.

Our travelling days are more limited now and we prefer hotel/motel/apartment type accommodation which suits us better whenever we do travel. Privacy, quietness, non-pressured availability of facilities, fewer distractions, a better controlled/managed environment etc are the main reasons for making this choice.

It's not my scene, I prefer to holiday in the middle of the city where there is malls and food places, and they tend to not have camping grounds around there

We have very young children and it's a bit difficult with them. easier with older kids, also we don't own a tent large enough for all of us anymore and not keen to invest in a new one.

I am a senior and have the funds to stay in a more comfortable environment. Sharing Facilities

Not into sleeping outdoors. prefer to have home amenities available. also, I take my dogs on holiday with me and feel safer for them to sleep indoors.

Because I am not prepared to share facilities with others and am prepared to pay more for an up-market facility.

Unless I am absolutely almost broke then I would choose it. Not appealing to me nor my family. Because of the housing crisis you have rough people staying there in emergency accommodation and I would not find it safe. I have also turned down motels because gang members have been moved in there by WINZ.

Our travelling days are more limited now and we prefer hotel/motel/apartment type accommodation which suits us better whenever we do travel. Privacy, quietness, non-pressured availability of facilities, fewer distractions, a better controlled/managed environment etc are the main reasons for making this choice.

It is more for family or group of friends while I'm most like to travel on my own or with my partner.

PROMPTS FOR OFF-PEAK TRAVEL

In what circumstances, if any, would you stay in a holiday park / camping ground in New Zealand outside of the peak (December – February) summer season? For example, what might prompt you to do this?

Respondents mentioned a number of circumstances in which they would stay in a holiday park / camping ground outside of the peak summer season:

- Good weather.
- Other (statutory / school) holidays or when the season is conducive to specific activities.
- Price reduction / special offers.
- Suitable facilities / activities / local attractions.
- When they need time out or a short break; or to spend time in nature.
- To spend quality time with family / friends.
- Where it aligns with other plans / activities.
- When there are limited alternative options.

'Good weather' is considered a pre-requisite to staying in a holiday park / camping ground, regardless of the month and even more so for those with children. Families are also constrained by school holidays. An 'Indian summer' or an unexpected spell of good weather may prompt or encourage a spontaneous booking, but this is most likely during the 'shoulder' season when more facilities and attractions are open (both at the accommodation and in the region.) Holiday parks are chosen for their outdoor and sometimes summer-focused activities and if these are closed and the weather is bad this is off- putting and disappointing.

However, some people do prefer to travel when it is quieter (no children around), cooler and when the conditions are conducive to their specific sport or recreational pursuits. Statutory holiday weekends and school holidays also offer opportunities for short or extended breaks (provided the weather is good and the facilities / amenities are suitable for year-round stays). Off peak stays are generally cheaper, which is also encouraging.

April, July, October, or when someone comes to visit me from abroad and we want to travel. I would consider staying in holiday parks (off season), but in the cabins/motels.

PROMPTS FOR OFF-PEAK TRAVEL [CONT.]

Staying at a holiday park / camping ground off-season, particularly in winter months, is dependent on the park / campground having the facilities and amenities to ensure guests have a warm and comfortable stay. Cabins must be heated; warm water must be constantly available for showers; and activities / facilities adapted to respond to the climate and guests' needs. Ideally, facilities and amenities in the local area should also be open. Hot pools are a definite bonus.

If there were interesting winter activities or sights nearby. / When there are activities available for my grandchildren.

*Games room - need to get ready more with winter season. **Warm cabins**, cheaper accommodation.*

Respondents expected deals or **price discounts** outside of the peak summer months. Promotions which offer price cuts or free activities, and last-minute deals can be tempting, though only if prices are cheaper with compared with other accommodation options nearby and the facility is set up and conducive to non-summer weather conditions.

*If it was affordable and **pet friendly**.*

Some respondents indicated they may be tempted to stay in a holiday park / camping ground outside of the peak summer season to spend quality time with family and friends; to catch up for a special occasion and to enjoy each other's company.

If my family members decided that we should stay during spring or autumn and the weather was good.

Some respondents are very receptive to staying in a holiday park / camping ground outside of summer. They can see the benefits and attractions of a short break to relax and revive and spend time in nature, though for some this is dependent on work, family, and other commitments.

Having some time off would prompt me to do this.. Just get away, break routine, experience destination in other seasons.

For others, their own or their families' recreational pursuits mean they travel to different parts of NZ all year round and are seeking good value accommodation in the areas they visit.

A sporting event that my family are in as they normally stay at a holiday park so I would stay with them. / Travel for my hobby to keep costs down

Several respondents said they would only stay in a holiday park / camping ground out of necessity and if no other suitable accommodation was available.

PROMPTS FOR OFF-PEAK TRAVEL [CONT.]

Sometimes we just take random trips, so any month is possible, my husband and I take trips together all the time just for the sake of it. Generally, all long weekends are family camping trips or motel getaways with adult children and cousins and their children. Plus, birthday trips and Christmas/new year trips mixture of camping, motels, and holiday homes

Top 1 Hopefully, it's nice weather we have booked for April 10 camping sites manage safety precautions extremely well.

I would consider it at any time. Good deals on cabin accommodation, availability of hot pools, and games rooms would all encourage me to choose holiday parks.

I will not stay in holiday park during peak season especially with covid 19 outbreak in NZ currently

Good deals/prices, near activities that can be done in the off-summer seasons.

I would consider it at any time. Good deals on cabin accommodation, availability of hot pools, and games rooms would all encourage me to choose holiday parks.

I might go there if there was a major event nearby that I wanted to attend, and other accommodation options were booked out. I have done this in Australia (to attend Bathurst) and would consider it in NZ too

If a family member wanted to organise a catch up or if I had to go to a place out of town suddenly, I would rather stay at the campground than anywhere else

Location and price and number of people travelling with.

To go away for up to three nights and stay locally during the week now we are retired to avoid school holidays and crowds.

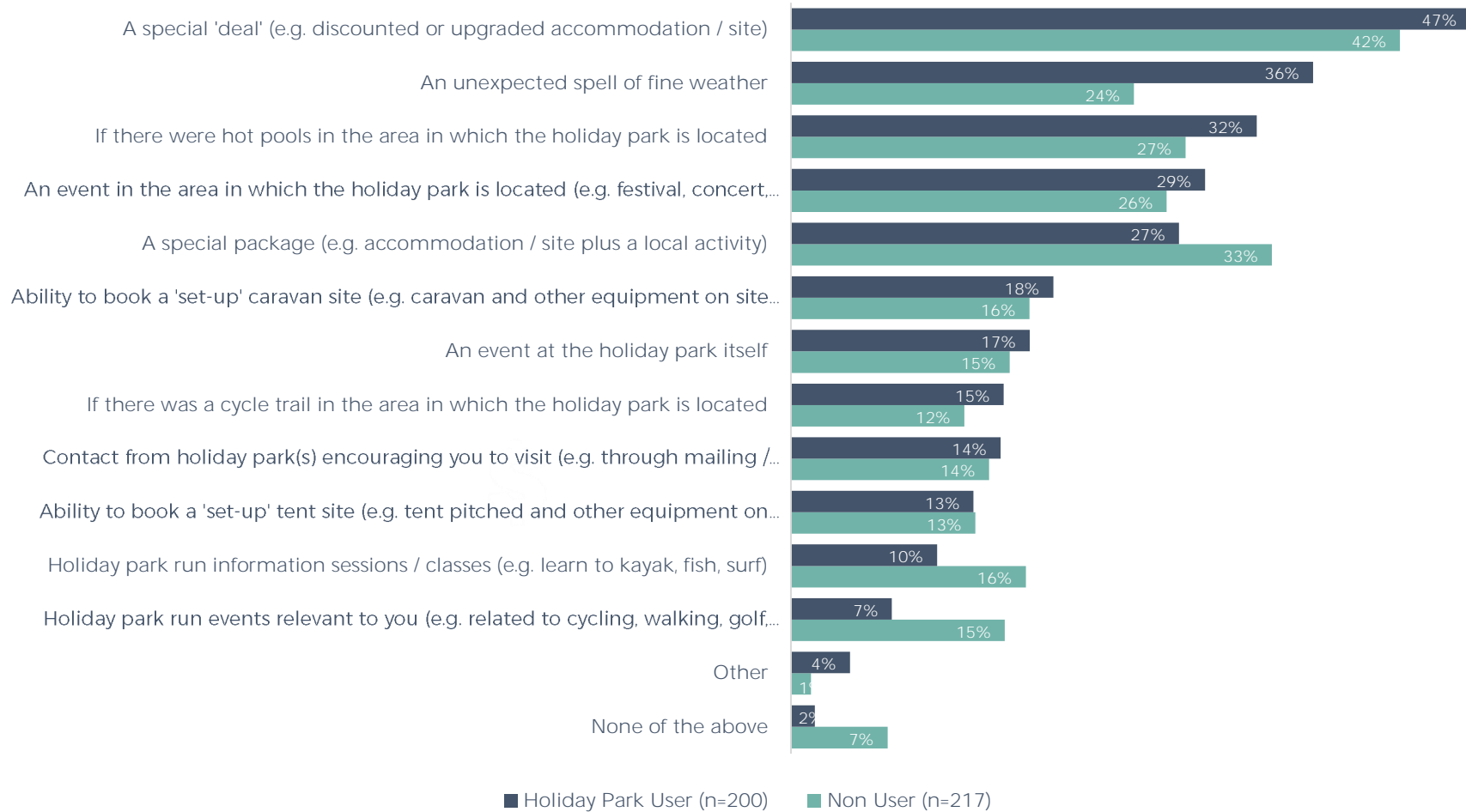
Better weather. two kids under 3 make it difficult to plan bad weather activities.

Depends on where I am going and what accommodation is available in the area.

If I can find one that has a cottage at a reasonable price (less than low-cost motel rooms in the same area).

ACTIVATING OFF-PEAK TRAVEL

Which, if any, of the following would most encourage you to travel to a holiday park / camping ground in New Zealand outside of the peak December / January period?





SAMPLE
PROFILE

SAMPLE PROFILE

	Total Sample	HP Users	Non Users
Gender: q.3			
Male	51%	53%	49%
Female	49%	47%	51%
Age: q. 2			
18 - 24 years	3%	2%	3%
25 - 29 years	26%	34%	29%
30 - 39 years	20%	22%	22%
40 - 49 years	21%	25%	15%
50 - 59 years	12%	8%	15%
60 - 69 years	9%	3%	10%
70+ years	10%	5%	6%
Base: Total Sample	n=605	n=204	n=401

	Total Sample	HP Users	Non Users
Lifestage: q39q			
Married/couple with children living at home (including in shared custody situations)	46%	49%	30%
Married/couple with children who are no longer living at home	10%	9%	11%
Married/couple, never had children	17%	16%	21%
Single with children living at home (including in shared custody situations)	7%	7%	6%
Single with children who are no longer living at home	5%	5%	4%
Single, never had children	15%	13%	25%
Other	1%	1%	2%
Base: Total Sample	n=605	n=204	n=401

SAMPLE PROFILE [CONT.]

	Total Sample	HP Users	Non Users
Occupation: q41			
Employed full-time in paid work (30+ hours per week)	66%	67%	62%
Employed part-time in paid work (<30 hours per week)	10%	9%	13%
Unpaid/volunteer work (full-time or part-time)	0%	0%	1%
Self-employed	2%	2%	5%
Studying	4%	4%	5%
Looking after family and/or home	4%	4%	5%
Looking for work or unemployed	2%	2%	1%
Retired	8%	7%	9%
Beneficiary	3%	3%	3%
Other	0%	0%	0%
Base: Total Sample	n=605	n=204	n=401

	Total Sample	HP Users	Non Users
Ethnicity: q 40			
New Zealand European	69%	70%	65%
Māori	17%	18%	10%
Chinese	4%	4%	6%
Indian	2%	1%	7%
Tongan	1%	1%	1%
Cook Islands Māori	0%	0%	2%
Samoan	0%	0%	1%
Niuean	0%	0%	1%
Other	10%	9%	14%
Prefer not to answer	0%	0%	2%
Base: Total Sample	n=605	n=204	n=401

SAMPLE PROFILE [CONT.]

Total Sample	
Region - n	
Northland	2%
Auckland	36%
Waikato	10%
Bay of Plenty	6%
Tairāwhiti / Gisborne	1%
Hawke's Bay	3%
Taranaki	2%
Manawatū-Whanganui	5%
Wellington / Wairarapa	8%
Marlborough	1%
West Coast	1%
Nelson / Tasman	2%
Canterbury	17%
Otago	4%
Southland	3%
Base: Total Sample	n=605

