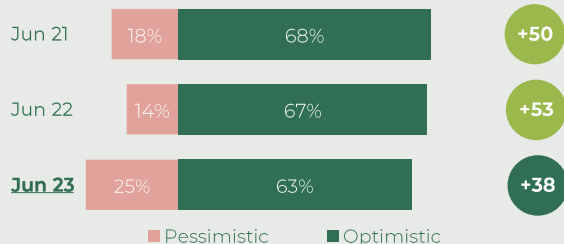


# HOLIDAY PARKS - KEY INSIGHTS JUNE 2023

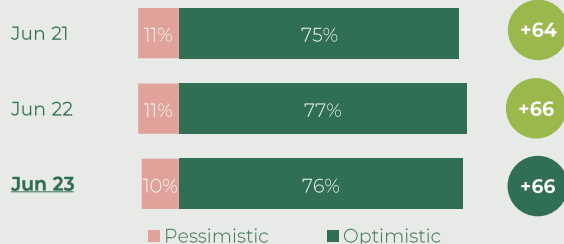
## BUSINESS CONFIDENCE MONITOR

### Confidence right now



Confidence has declined significantly heading into winter – a pattern different from previous years. Pessimists were 8% in Dec 22, 7% in Mar 23, before jumping to 25% in Jun 23.

### Confidence for the next 12 months



### Demand vs. last year...

Compared with the same period last year, **49%** of Holiday Parks experienced an increase in demand during autumn (March to May), while **29%** experienced a decrease in demand.

Looking forward, **31%** expect to experience an increase in demand during winter (June to August) compared with the same period last year, while **33%** expect to experience a decrease.

Confidence score = (total optimistic) – (total pessimistic)  
Based on a June 2023 survey of Holiday Parks NZ members  
A more detailed breakdown is available on request.

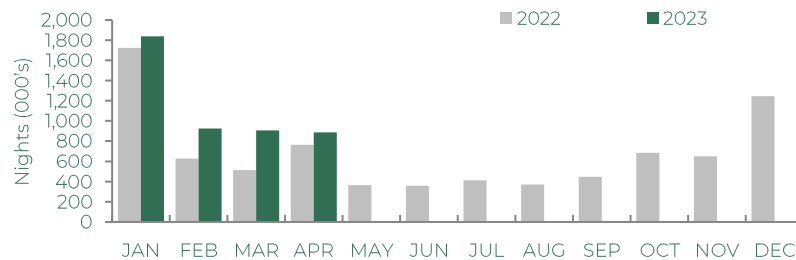
### Main factors contributing to the change in demand expected during winter

## HOLIDAY PARK SHARE OF TRADITIONAL COMMERCIAL ACCOMMODATION MARKET (ADP: YE APRIL 2023)

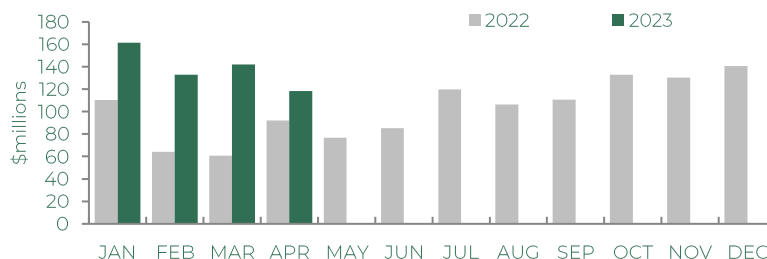
	Guest Nights	Market Share	Occupancy	Avg. Nights per guest
Holiday Parks	9,084,800	25%	29%	2.3
Hotels	12,653,500	34%	66%	1.9
Motels	11,241,500	31%	72%	2.2
Backpackers	2,505,200	7%	62%	2.3
Lodges & boutique accommodation	1,258,100	3%	51%	2.0

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 – DOMESTIC ONLY (TECTS)



▲ Demand expected to INCREASE	▼ Demand expected to DECREASE
66% International visitor market	55% Weather conditions
55% Appeal of your region	52% Global economic conditions
41% Domestic visitor market	48% Domestic visitor market
31% Appeal of holiday parks	35% Freedom camping

## HOLIDAY PARKS REGIONAL VIEW (ADP: YE APRIL 2023)

Region	RTO	Guest Nights	Market Share *
Northland		818,000	46%
Auckland		290,300	5%
Waikato		367,900	30%
Coromandel		476,300	59%
Bay of Plenty		722,300	50%
Rotorua		313,700	22%
Lake Taupo		391,500	27%
Eastland		254,000	54%
Hawke's Bay		349,400	34%
Ruapehu		76,300	17%
Taranaki		268,700	31%
Wairarapa		101,000	34%
Wellington		181,800	7%
Marlborough		229,700	33%
Nelson Tasman		664,700	48%
West Coast		448,700	37%
Kaikoura		173,700	41%
Hurunui		154,400	39%
Canterbury		608,200	18%
Timaru		184,600	49%
Mackenzie		222,500	36%
Waitaki		133,400	33%
Central Otago		126,800	38%
Lake Wanaka		368,700	45%
Queenstown		296,700	9%
Clutha		109,500	71%
Southland		132,400	22%
Fiordland		207,200	41%

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

### HOLIDAY PARK SUPPLY



ADP, April 2023

Accommodation Types	Number available
Backpacker beds	1,657
Cabin units	2,200
Ensuite units	660
Motel units	1,263
Powered sites	16,019
Unpowered sites	10,574

Source: Holiday Parks New Zealand members, June 2023