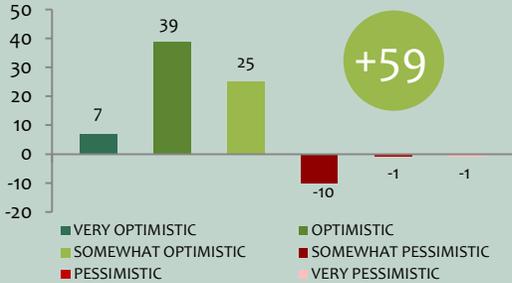
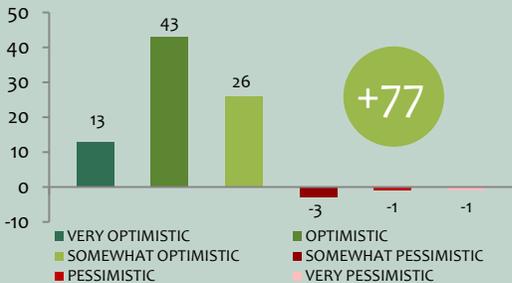


Business Confidence Monitor

Confidence right now



Confidence for next 12 months



Confidence vs. last year...

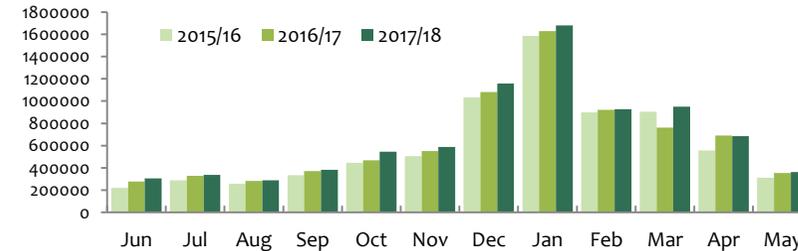
On the same period in 2017, confidence right now is down 18 points (likely to be partly due to the Lions Tour in June/July 2017), and confidence for the next 12 months is down 3 points.

Confidence score = (total optimistic) – (total pessimistic)
Based on a July 2018 survey of Holiday Parks Assoc. NZ members

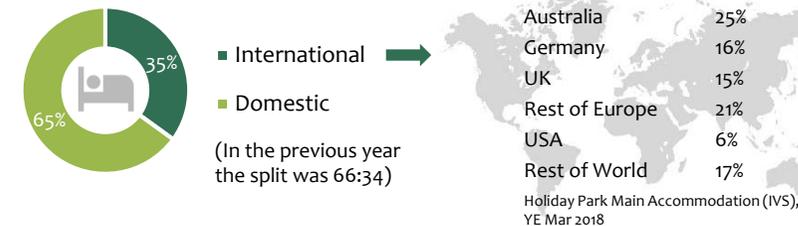
Holiday Park Share of Traditional Commercial Accommodation Market (CAM - YE May 2018 vs. Previous Year)

	Guest Nights	YOY Change	Market Share	Occupancy
Holiday Parks	8.2m (7.7m)	+6%	21% (20%)	21% (19%)
Hotels	14.2m (13.7m)	+4%	36% (35%)	70% (69%)
Motels	12.4m (12.2m)	+1%	31% (32%)	61% (60%)
Backpackers	5.2m (5.2m)	+/-0%	13% (13%)	45% (44%)

Seasonality: Holiday Park Guest Nights By Month (vs. Previous Years - CAM)



Demand by Market (CAM - YE May 2018)



Regional View (Holiday Parks, CAM - YE May 2018)

Region	Guest Nights	YOY Change	Market Share*	Origin** Dom : Intl
Northland	778,000	+4%	40%	72 : 28
Auckland	421,000	-4%	6%	70 : 30
Coromandel	546,000	+4%	59%	75 : 25
Waikato	284,000	+1%	20%	66 : 34
Bay of Plenty	456,000	+3%	37%	79 : 21
Rotorua	333,000	+16%	14%	61 : 39
Taupō	226,000	+19%	19%	72 : 28
Gisborne	175,000	-2%	44%	90 : 10
Taranaki	193,000	+17%	29%	78 : 22
Hawke's Bay	298,000	+15%	25%	82 : 18
Kāpiti-Horowhenua	128,000	+3%	48%	82 : 18
Marlborough	200,000	-	26%	61 : 39
Nelson-Tasman	578,000	+4%	39%	72 : 28
Canterbury	1,219,000	+12%	23%	62 : 38
West Coast	349,000	+4%	25%	43 : 57
Wanaka	321,000	+21%	34%	55 : 45
Queenstown	369,000	+1%	10%	35 : 65
Central Otago	165,000	-	50%	86 : 14
Southland	85,000	+23%	18%	42 : 58

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

Holiday Parks: Supply



CAM, YE May 2018
(400/408 in 2 prev. yrs)

Accommodation Types	% of Parks Offering Accom. Type (2018)
Non-Powered Sites	90%
Powered Sites	98%
On-site Vans	15%
Cabins	87%
Kitchen Cabins	46%
Ensuite Units	36%
Self-Contained Units	63%
Motels	55%

From survey of Holiday Parks Assoc. NZ members

While staying at holiday parks guests contribute over \$1.1 billion annually in direct expenditure to local communities. Approximately \$610 million (53%) is from domestic travellers and \$542 million (47%) is from international travellers. 2016/17 studies by Angus & Associates revealed domestic visitors spend \$146 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.

