

An aerial photograph of a sandy beach with several groups of people in kayaks. The kayakers are arranged in lines on the sand. The ocean waves are visible at the top of the frame, and a line of green trees is at the bottom. A stylized white logo, consisting of concentric arcs and a central shape, is overlaid on the beach area.

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Rutherford Labs Presents:
**The 2020 Domestic
Tourism Survey**



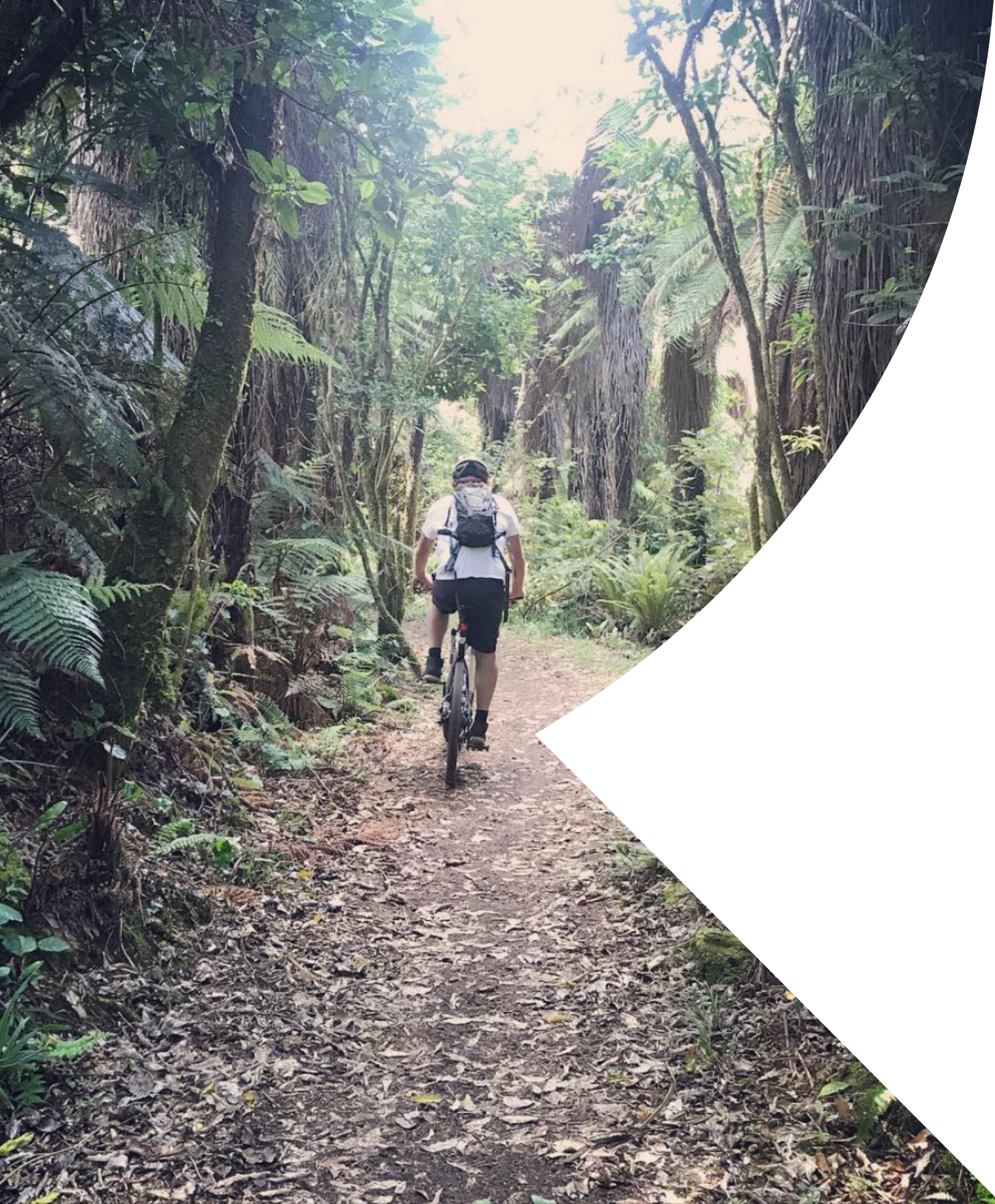
Kiwis will foresake their overseas trips in favour of domestic holidays in 2020-2021.

The New Zealand government announced a transition to Level 2 COVID-19 protocols will began on the 14th May 2020. This transition included re-authorisation of domestic travel. The New Zealand tourism industry is eagerly awaiting the implications of this move. International tourism is unlikely to resume in the next 6-12 months beyond a possible Australia/New Zealand travel “bubble,” so New Zealand tourism companies will need to focus on an unusual market: Kiwis.

In a survey of 308 New Zealanders, we investigated the extent to which Kiwis would be open to the idea of “trading in” their planned international holidays for domestic itineraries, and the extent to which these holidays would include much spending on touristic activities.

We discovered that, under certain circumstances, New Zealand tourism businesses can expect an influx of Kiwi tourists in 2020 and 2021.

- **Contrary to popular belief, our respondents took holidays almost twice as often in New Zealand than overseas—even before COVID-19**
- **72% of respondents indicated they would be trading in their international holidays for domestic ones over the next 6-12 months**
- **73% of respondents who were planning to holiday both in New Zealand and abroad aim to spend more money on their domestic holidays while overseas travel is banned**
- **Cost, health safety, and variety were frequently cited as factors that will motivate Kiwis to spend on domestic tourism**



Taking a closer look

Reassurance about health safety will be important for ensuring domestic travel and tourism sees a major spike in the next 6-12 months.

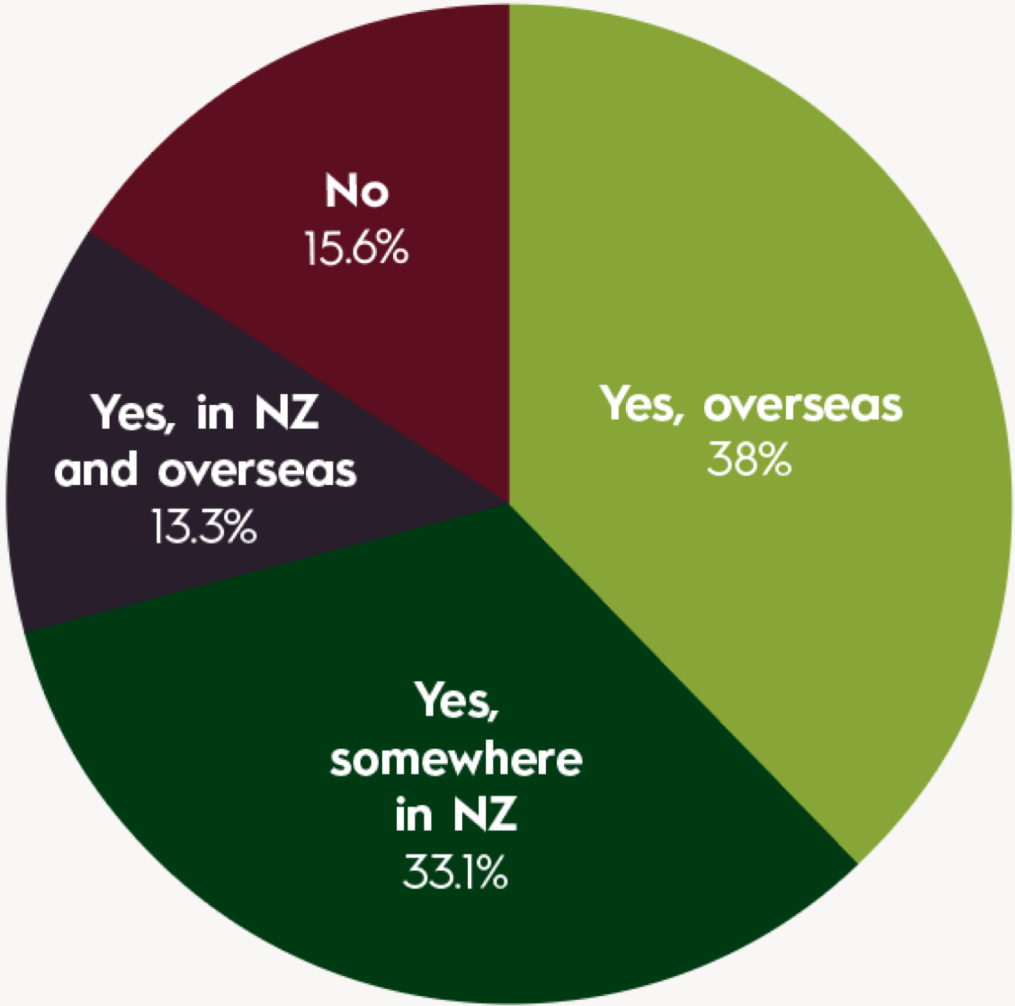
- Respondents were more likely to be concerned about contracting COVID-19 while travelling abroad than in New Zealand, but were still reasonably concerned about both (4.0 vs 3.4 on a 7-point scale)
- Respondents who were 35+ were more likely than younger respondents to be concerned about COVID-19 while traveling (3.5 vs 3.16)
- If Australia and New Zealand open up a travel “bubble” in the next 6-12 months, 67.9% of respondents indicated they would still take a holiday in New Zealand
- Families with children under 15 were equally likely as those without children to plan on altering their travel plans in the next 6-12 months to include a New Zealand destination

Kiwis over 35 years old will be an important group to target for domestic travel and tourism businesses.

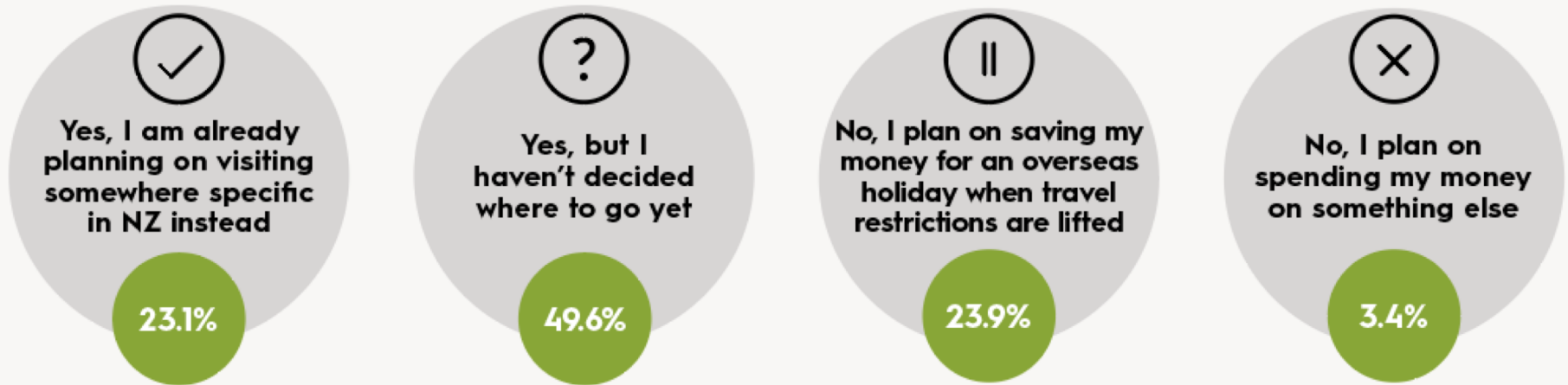
- Respondents who were 35+ were slightly more likely to alter their plans to include a domestic holiday
- Those who were under 35 were much more likely to have decided already where they'd like to go in New Zealand
 - Auckland, Wellington, Queenstown, and the South Island (in general) were the top four destinations people had chosen if they had already decided
- Respondents who were 35+ were much more likely than younger respondents to act as a tourist when taking a New Zealand holiday (41% vs 30%)
 - Interestingly, respondents with children under 15 were no more likely to act like a tourist when taking a New Zealand holiday than any other family type.

Results page 2

Were you planning on taking a holiday during 2020?



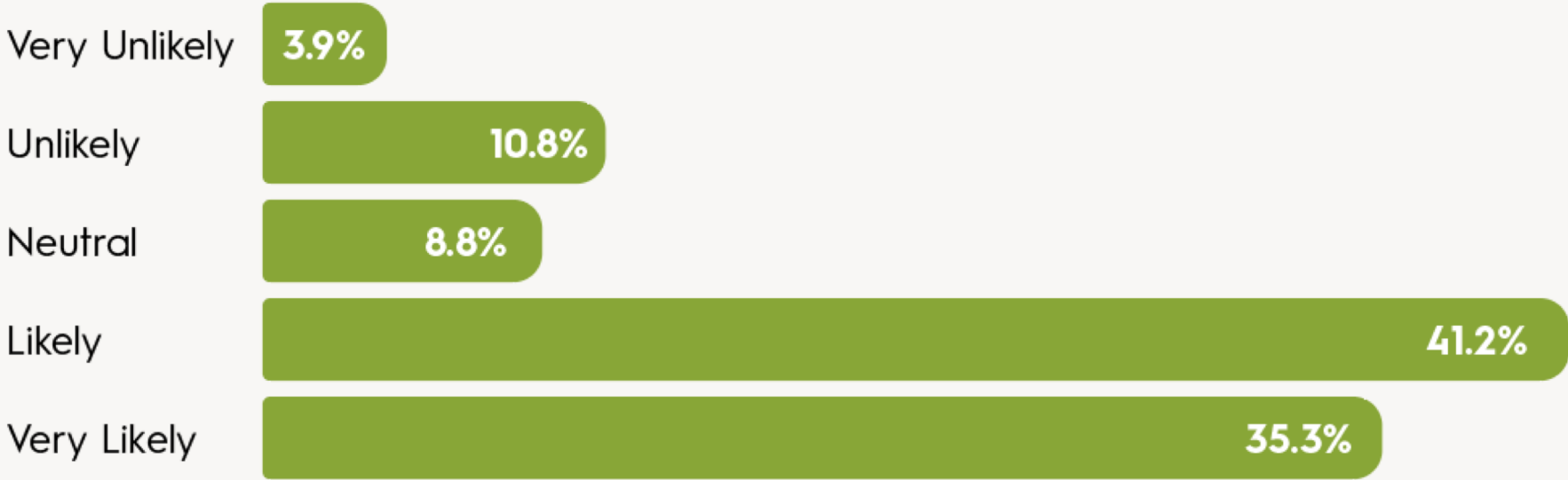
Assuming international travel is banned for the next 6-12 months, are you likely to change your 2020 travel plans to include a holiday in New Zealand?



Assuming international travel is banned for the next 6-12 months, are you likely to spend more money on your holiday in New Zealand?



Assuming you can travel domestically within New Zealand during the next 6-12 months, are you still likely to visit that location?

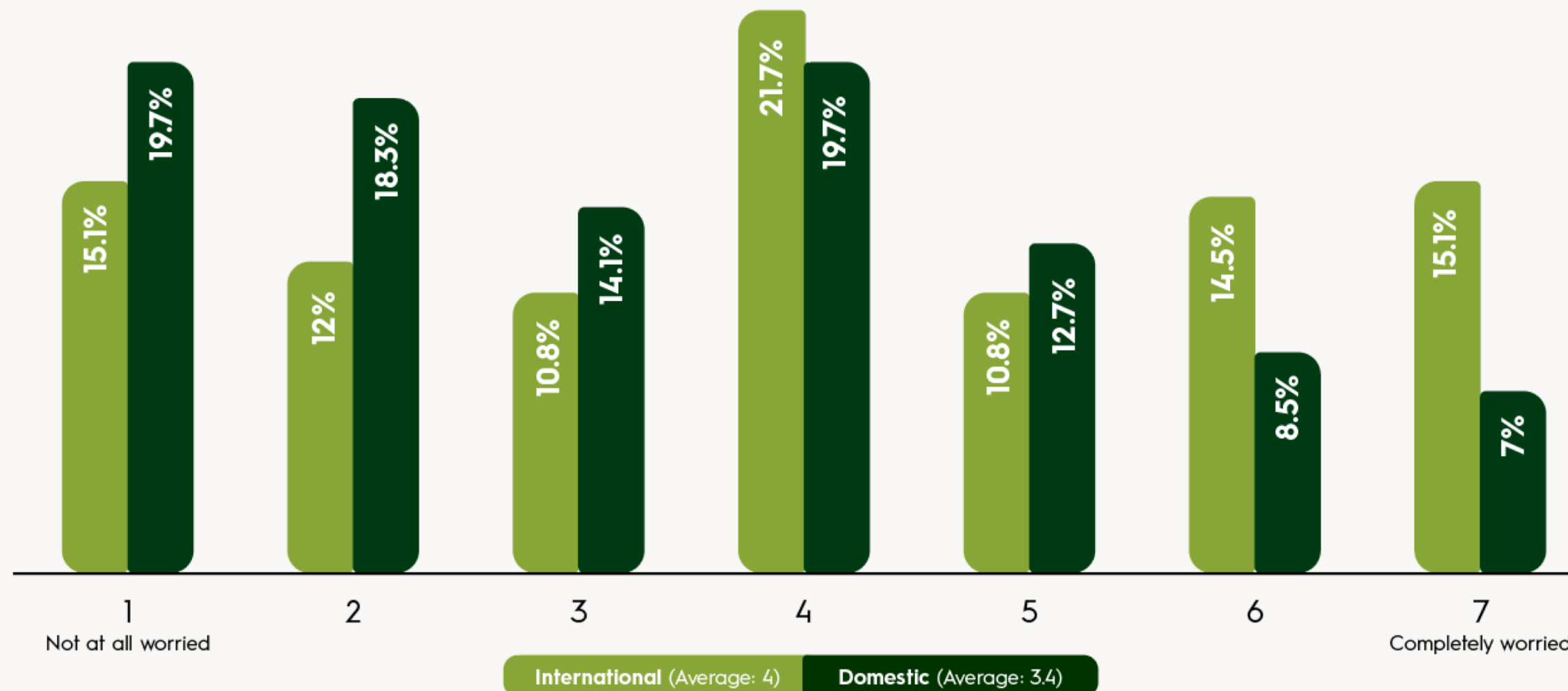


Results page 3

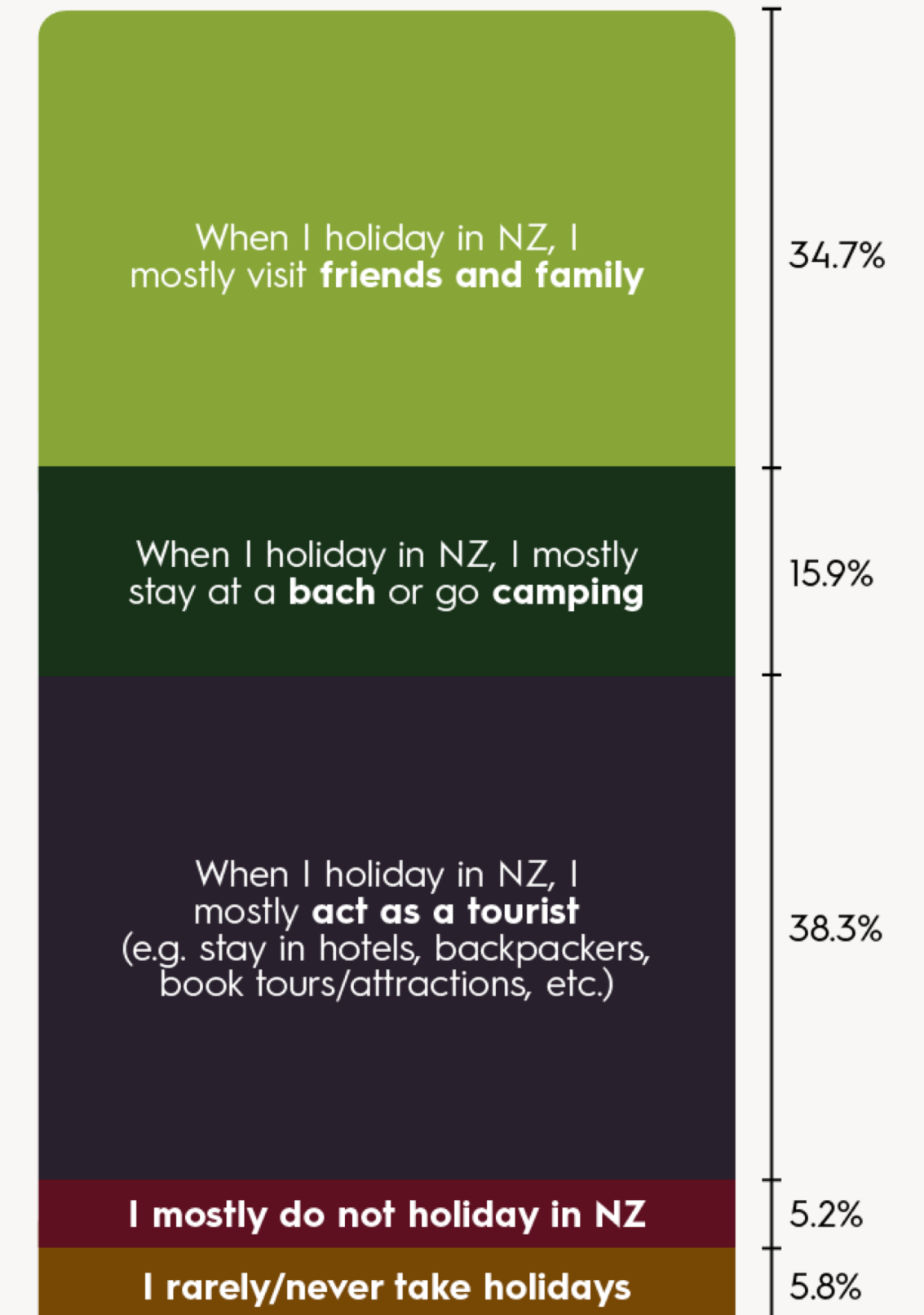
People may be able to travel between Australia and New Zealand before other international travel is permitted during the next 6-12 months. If this is true, which action are you most likely to take during this time period?



When New Zealand lifts travel restrictions for all domestic and international travel, how worried are you that you will contract COVID-19 on a holiday in New Zealand and overseas?



What are your feelings on taking holidays in New Zealand?



**Ngā Mihi
Thanks**



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