

travel

NOWNEXT

**TAPPING INTO THE HEARTS & MINDS
OF NEW ZEALANDERS -
SENTIMENTS & INTENT TO TRAVEL**

Brought to
you by Stuff



AUGUST 2022

NOWNEXT



DEVELOPING A RICH UNDERSTANDING OF THE
HEARTS AND MINDS OF NEW ZEALANDERS



STUFF'S PROPRIETARY INSIGHTS PROGRAMME
COVERING TRAVEL INTENT AND SENTIMENT



NATIONALLY REPRESENTATIVE, REGULAR UPDATES



ROBUST SAMPLE SIZE 2500+ PARTICIPANTS

WE SURVEY A NATIONALLY REPRESENTATIVE SAMPLE OF NEW ZEALANDERS

By gender

Female

52%

Male

48%

By age

18-34

30%

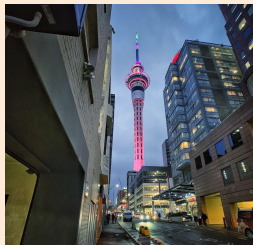
35-54

38%

55+

32%

By region



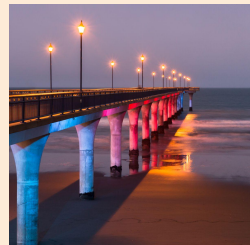
Auckland

33%



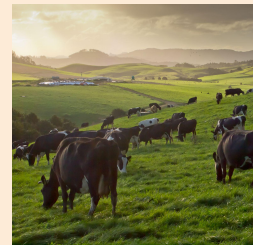
Wellington

11%



Christchurch

13%



Regional NZ

43%

73%

OF NEW ZEALANDERS
INTEND TO TRAVEL **WITHIN NZ**
IN THE NEXT 12 MONTHS

58%

OF NEW ZEALANDERS INTEND
TO TRAVEL **INTERNATIONALLY**
IN THE NEXT 12 MONTHS



CONTENTS

01 Key insights

02 Domestic travel

03 International travel

KEY INSIGHTS

NZers are eager to travel for leisure purposes at the moment.

Three-quarters of us will take a **domestic** trip in the **next 12 months** whereas **more than half** are ready to go **abroad**.

There are different **barriers** in play keeping Kiwis from going on holiday. Many NZers are **waiting** to go **overseas** instead of booking domestic travel now. **Finances / COVID** are restricting **overseas** intent.

Lastly, NZers most want to '**rest and relax**' and '**spend time with friends and whānau**' - whether it's here in NZ or an overseas trip.

travel

DOMESTIC TRAVEL INSIGHTS

Brought to
you by Stuff



WHO ARE THE 73% TRAVELLING NZ IN THE NEXT 12 MONTHS?

WOMEN

36%

already booked vs. 31%
of men

AGE GROUP 35-44

38%

have already booked,
significantly more than
other age groups

HOUSEHOLDS WITH
CHILDREN 5-12

81%

already booked or
planning, significantly
more than other HH

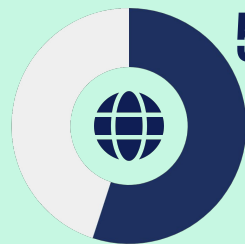
NOW THAT BORDERS ARE OPEN, OVERSEAS TRAVEL BECOMES A PRIORITY

The majority of New Zealanders, who are not intending to travel in the next 12 months, are waiting to travel overseas instead.

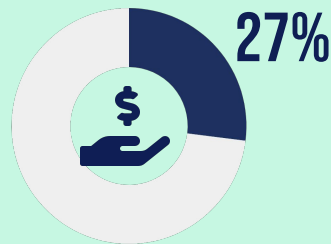
Concerns over the affordability of travel and airfares in particular are also holding people back.

Concerns around Covid are important, but they don't weigh on people's minds as much as when they are thinking about overseas travel (40%).

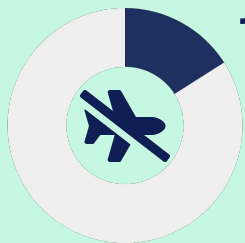
TOP 4 BARRIERS FOR NZ TRAVEL



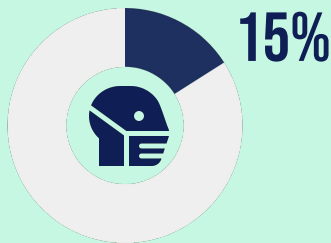
Waiting to travel overseas



Can't afford to



Airfares are too expensive

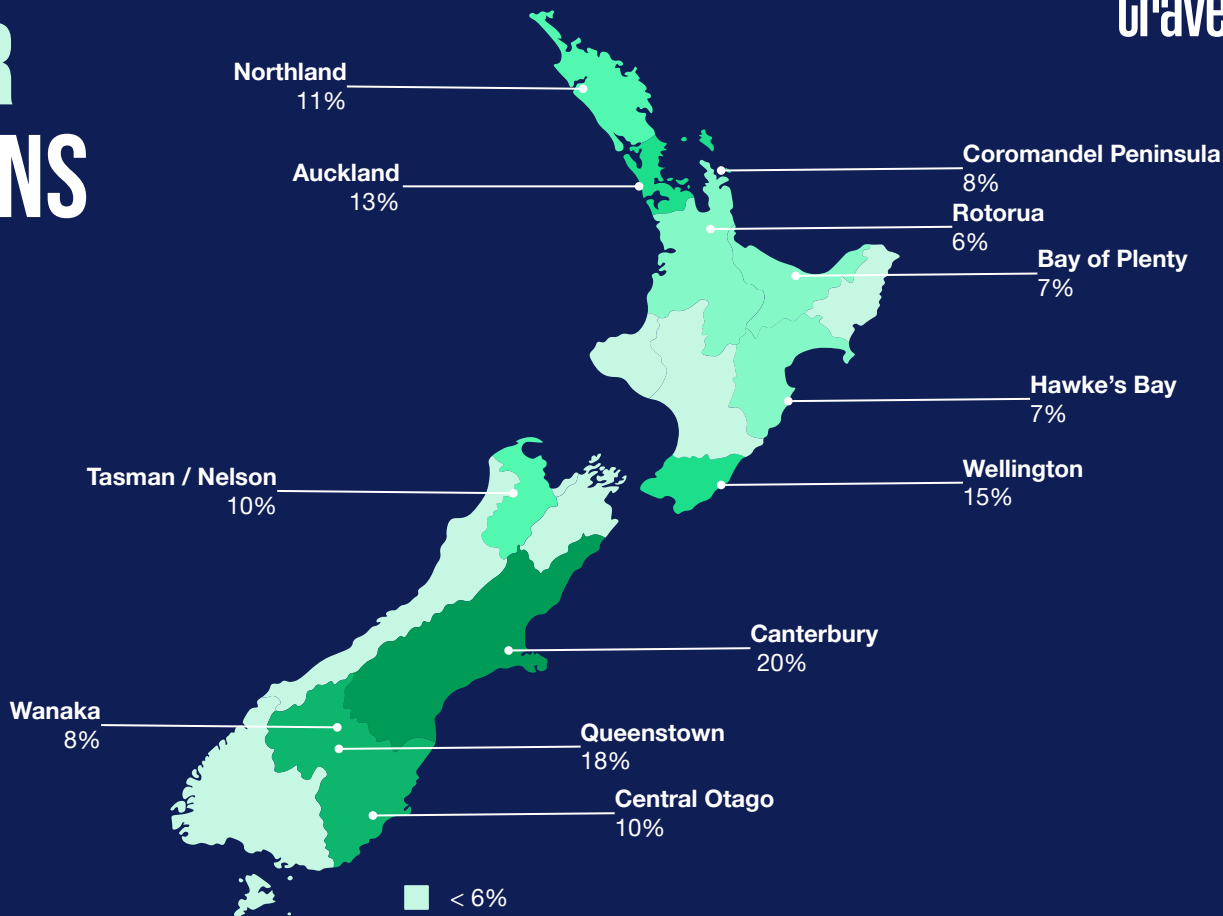


Worried about getting COVID while travelling

Source: NowNext Travel Survey, Stuff, July 2022; Q: "You mentioned you don't expect to take a trip within NZ in the next 12 months. What is keeping you from travelling?"; N = 243

MOST POPULAR NZ DESTINATIONS TO TRAVEL TO

Canterbury and Central Otago stand out as the most popular travel destinations - as it's currently ski season - closely followed by City destinations Wellington and Auckland.



travel



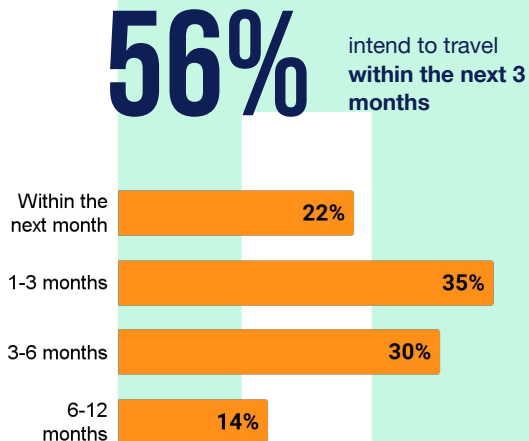
THINKING ABOUT THEIR NEXT TRIP WITHIN NZ ...

Of those who plan to travel, about **half will do so within the next 3 months.**

30% of NZers plan weekend trips over 2-3 days, and **75% of all NZ travel** will be **up to a week.**

Singles are more likely to **travel for longer**, as are **older age groups (65+)**, the latter likely due to more freedom granted in retirement.

When will they go?



Duration of travel

75% of these trips will be shorter, **up to a week**



Singles (30%) and **65+ year olds (46%)** are significantly more likely to plan **longer trips** around NZ, 8 days or more.

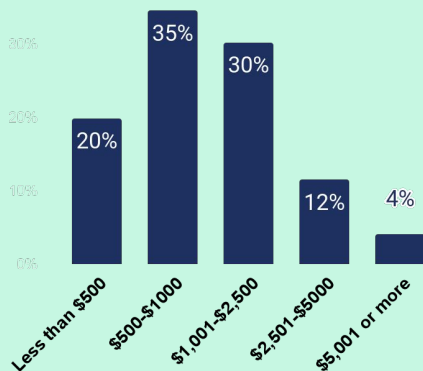
THINKING ABOUT THEIR NEXT TRIP **WITHIN NZ** ...

How much will they spend?

Most NZers plan to spend **less than \$1000** on their next trip.

This is **closely related to age and household income**. The older the person, likelier they are to spend more.

Women are intending to be **more thrifty** than men on their next trip, with 22% intending to spend less than \$500 vs 17% of men.



How will they get there?

When travelling within NZ, **road trips and air travel** are by far **the most popular** way to get around.

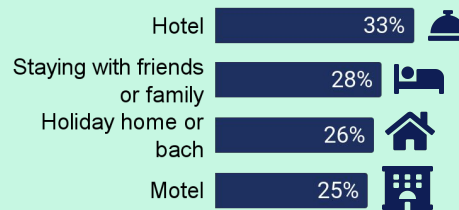
Our **oldest demographic** (75+) are significantly more likely to travel by **bus, ferry or cruise**, whereas **younger, single New Zealanders** without children are most likely to **fly**.



And where will they stay?

Preferences for types of accommodation are quite evenly spread, with hotels, staying with friends and family, holiday homes or baches and motels all being popular options.

Individuals who live in **groups flatting together** are most likely to **go camping** (17%) or **rent a holiday home/bach** (39%), compared to other household types.



9% CITY STAYCATION

Households with **children under five** are most likely to opt for a nice and simple staycation (13%).

11% HEALTH AND WELLBEING

It seems that **lower income households** (\$40-59k at 19%), and **NZers living in shared flats** (21%) are more likely to want to use their holiday to look after their health and wellbeing.

12% LUXURY & PAMPERING

Our **youngest age group (18-34 y/o)** is most keen on luxury experiences (17%), but also - maybe less surprisingly - the **highest income bracket** (\$200k+ at 17%).

19% SHOPPING & CITY EXPERIENCES

Women are more likely than men to seek out shopping & city experiences (22% vs. 17% men).

54% REST AND RELAXATION

Men are significantly more likely to opt for rest and relaxation than women (57% vs. 51%).

48% TIME WITH FRIENDS/WHĀNAU

Households with children under 13 are particularly likely to look forward to family time and visiting friends (63%).

43% OUTDOORS & ADVENTURE

Preference for this category is related to age, with **younger NZers** more likely to be looking for 'Outdoors & Adventure' experiences.

33% ROAD TRIPS & TOURING

NZers living as a group flatting together (44%) and **singles** (37%) are most likely to hit the road.

EXPERIENCES NEW ZEALANDERS SEEK IN NZ

17% ADVENTURE

NZers living in **shared flats** (35%), and our **youngest age group** (18-34 at 28%) are most hungry for adventure.

19% ARTS, CULTURE & HERITAGE

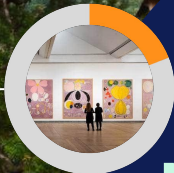
NZers from all demographics showed similar levels of interest in cultural experiences, though **women** were more likely to prefer this than men (22% vs 17%).

27% FAMILY FRIENDLY ACTIVITIES

Preference for this category was almost exclusively driven by respondents living in **HH with children** (up to 58%).

30% URBAN SIGHTSEEING

Women are more likely than men to seek out urban attractions and sightseeing (32% vs. 26%). **Families with children under five** are **less likely** to select this category (16%).



ACTIVITIES NEW ZEALANDERS WILL BOOK IN NZ

59% FOOD & DRINK

Food and drink experiences are popular across the board, but particularly in **group households** (80%) and among **18-34 year olds** (67%).

40% NATURE, OUTDOORS & WILDLIFE

Nature experiences were similarly popular across all demographics, though more so with **women** (45%) than men (35%).

38% WALKING & HIKING

Women were more likely to look forward to walking and hiking than men (41% vs. 35%). It was **less popular in households with children under 5** and among our oldest age bracket (65+).

33% HOT POOLS & SPA

It seems almost anyone can get excited about a good soak as hot pools and spas were **similarly popular across demographics**, with the exception of 65+ year olds.

travel

INTERNATIONAL TRAVEL INSIGHTS

Brought to
you by Stuff



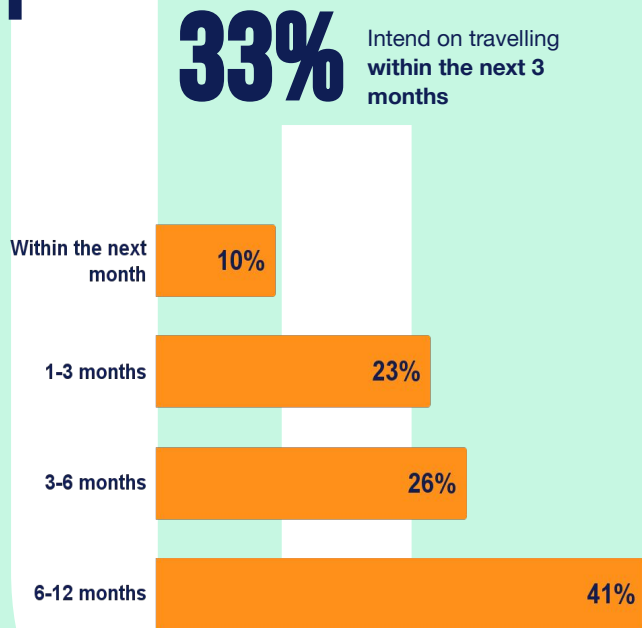
THINKING ABOUT THEIR NEXT TRIP OVERSEAS ...

Of those who intend to travel, **a third will do so within the next 3 months.** NZers seem to be **more comfortable visiting Australia / Pacific Islands** sooner than other international destinations (37% vs 27%)

Kiwis are looking to make the most of their overseas travel, and will **average 8-14 days away.** A **quarter (27%)** will stay away a bit longer - **14-28 days.**

Families with young children (under 5) are more likely to only for **4-5 days** whereas **65+ year olds** for **more than 2 weeks.**

When will they go?



Duration of travel

31%

Of these trips will be **8-14 days**



1 in 5 families with young children (under 5) will only go away for 4-5 days. 58% of 65+ year olds will be on an overseas holiday for more than 2 weeks.



Spend on trip

NZers are planning on spending an **average of \$2501-\$5000** (excluding flights) on their next overseas trip.



WHO WILL TRAVEL INTERNATIONALLY IN THE NEXT 12 MONTHS?

AGE GROUP 18-34

37%

have already booked,
significantly more than
other age groups

AUCKLANDERS

65%

intending to travel,
significantly more than
other regions

GREATER
HOUSEHOLD
INCOMES

up to **2x**

as likely to have booked
or planned overseas
travel than lower HHI

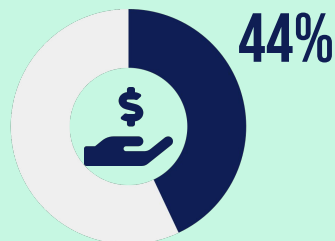
2 IN 5 KIWIS DON'T INTEND ON TRAVELLING INTERNATIONALLY IN THE NEXT YEAR

The majority of New Zealanders, who won't travel overseas in the next 12 months, say it's because they cannot afford it. This is supported by Stuff's recent Mood of the nation* survey that found 68% of NZers are *extremely concerned* about cost of living at the moment. Concerns about affordability are particularly an issue for 18-34 year olds - target this audience with more affordable holiday options / deals etc.

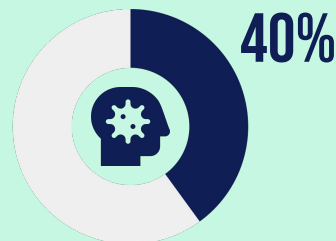
COVID-19 is another big concern for Kiwis - whether it's disrupting their plans or causing illness - particularly as cases are on the rise globally. These are the main barriers for 65+ year olds - assure them with flexibility and safety messages.

travel

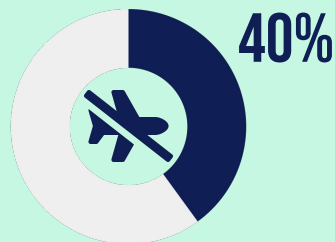
TOP 4 BARRIERS FOR INTERNATIONAL TRAVEL



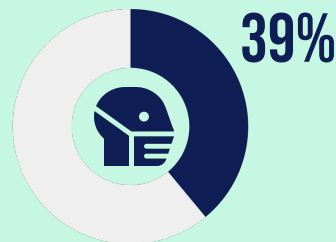
Can't afford to



Worried about getting COVID and having my travel disrupted



Airfares are too expensive



Worried about getting COVID while travelling

Source: NowNext Travel Survey, Stuff, July 2022; Q: "You mentioned you don't expect to take a trip within NZ in the next 12 months. What is keeping you from travelling?"; N = 727



KIWIS TAKING FLIGHT

5 MOST POPULAR INTERNATIONAL DESTINATIONS:



1

AUSTRALIA

40%



2

USA

16%



3

EUROPE

14%



4

ASIA AND INDIA

13%



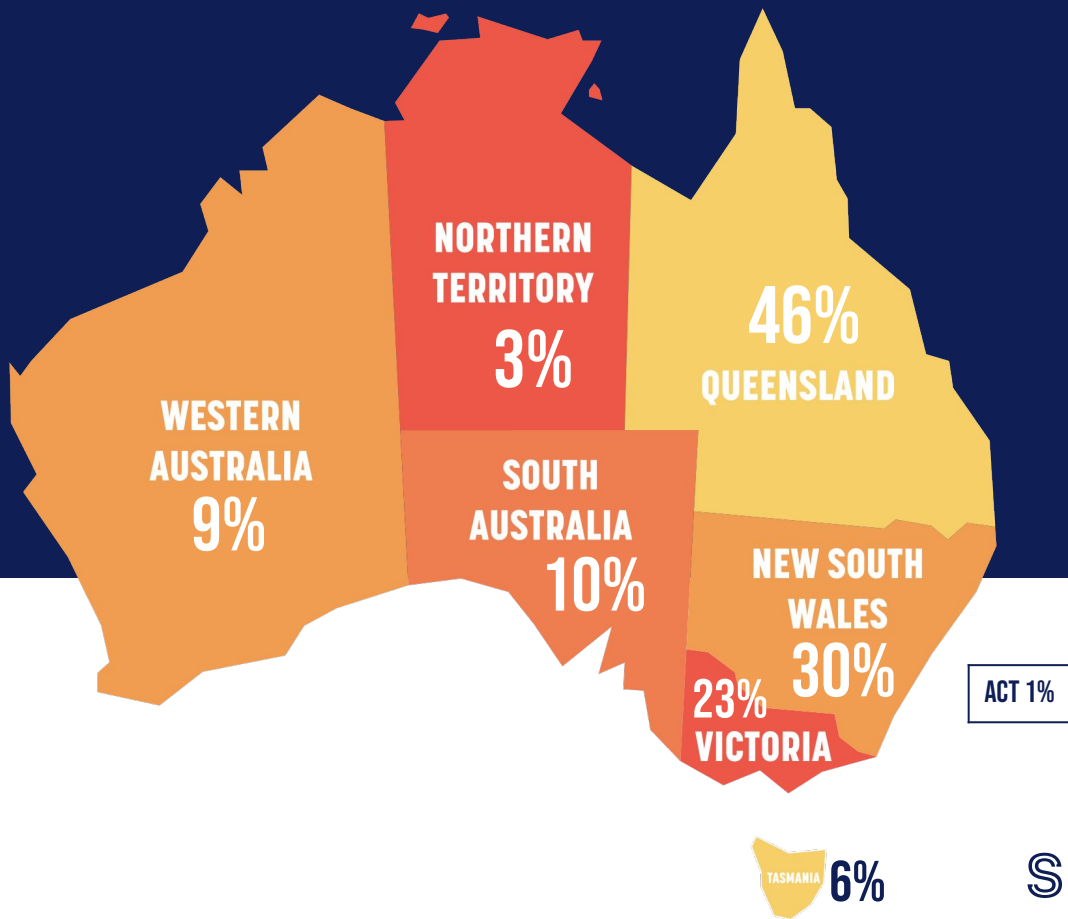
5

COOK ISLANDS

12%

WHERE IN AUSTRALIA ARE KIWIS WANTING TO GO?

There is high demand for Queensland at the moment as NZers are looking to escape the winter. About a third of those that will visit Australia next will be heading to New South Wales.



11% OCEAN CRUISING

Ocean cruising has made it into the top 8 and appeals to all ages similarly.

15% GUIDED TOUR

While guided tours are not the most popular, we have similar appeal scores across all age groups / household structures.

16% LUXURY & PAMPERING

Those that are group flatting are looking for a bit of pampering whereas as this is not particularly appealing for 65+ year olds.

34% ROAD TRIPS & TOURING

A third of international travellers are wanting to go on a road trip and it's the younger (18-34 YO) / older (55+ YO) males most keen on this.

59% REST AND RELAXATION

NZers are looking to recharge overseas as 'rest and relaxation' is the #1 reason for travelling. This is true for all ages.

51% TIME WITH FRIENDS/WHĀNAU

Now that borders are open, NZers can also catch up with friends and whānau and that's exactly what they are planning on doing - especially households with middle-age children (5-12) and females.

49% SHOPPING & CITY EXPERIENCES

Going on shopping trips and city experiences is much more appealing for overseas travellers compared to domestic - more than double. This skews largely towards 18-34 YO (59%) and households with adult children.

40% OUTDOOR & ADVENTURE

Similar to shopping / city experiences, again this is more appealing for 18-34 YO (52%) and households with adult children (twice as more likely compared to households with children under 5 year olds)

EXPERIENCES NEW ZEALANDERS SEEK OVERSEAS

22% ADVENTURE

The **youngest age bracket** (18-34 year old) is the most hungry for adventure experiences (31%).

28% FAMILY FRIENDLY ACTIVITIES

Households with children age 5-12 (72%) will definitely be looking for family friendly activities abroad. It also seems that **women** are more likely than men to have their family at the forefront of their mind when planning activities (31% vs 25%).

32% WALKING & HIKING

Women (37%) are much more likely than men (27%) to seek out walking and hiking experiences overseas.

33% ARTS, CULTURE & HERITAGE

Our **youngest age group** (18-34 y/o) are keen on culture (44%). **Women** (36%) are also more likely to select this category than men (29%).

ACTIVITIES NEW ZEALANDERS WILL BOOK OVERSEAS

65% FOOD & DRINK

While most people can get excited about international food and drink experiences, this category is particularly popular with **groups flatting together** (76%), and **18-34 year olds** (73%).

48% URBAN SIGHTSEEING

Households with adult children (59%) are particularly keen on urban sightseeing in foreign countries.

46% NATURE, OUTDOORS & WILDLIFE

Singles (49%) were more likely than other household types to select this category, and it is particularly popular among **18-34 year olds** (56%).

38% RESORT, BEACH AND POOL

Women (41%), and **households where the oldest child is 13-18** (48%) can really see themselves lounging at the pool: They have a stronger preference for this category than average.

travel

DEEP-DIVE INSIGHTS

Brought to
you by Stuff



OCEAN CRUISING

1 in 10 of those intending to go overseas in the next 12 months would like to go on an ocean cruise.

Australia is still the most popular destination for those that said they are interested in ocean cruising. We see higher figures for Europe when it comes to ocean cruising compared to all of those that are intending to go on an overseas holiday in the next year - 25% vs. 14%.

While 1 in 3 ocean cruising enthusiasts plan to go in the next 3 months, the majority will only do so in 6-12 months.

Who is interested?



11%

Of those than intend to go overseas in the next year want to have an **ocean cruise** experience

Those that want an ocean cruise on their next trip skew towards individuals from Regional NZ, additionally we see significantly higher interest amongst those from Manawatu-Wanganui / Canterbury.



Where will they go?



AUSTRALIA
36%

EUROPE
25%



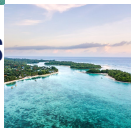
USA
18%

UK
15%



FIJI
14%

COOK ISLANDS
14%



When will they go?

35%

Of those that want an ocean cruise intend to go **within the next 3 months**

Within the next month

8%

1-3 months

27%

3-6 months

19%

6-12 months

47%

travel



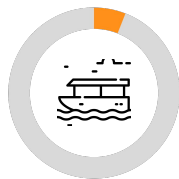
RIVER CRUISING

6% of those intending to go overseas in the next 12 months would like to go on an river cruise.

Australia is still the most popular destination for those that said they are interested in river cruising. We see higher figures (more than double) for Europe when it comes to river cruising compared to all of those that are intending to go on an overseas holiday in the next year - 37% vs. 14%.

While 1 in 10 river cruising enthusiasts plan to go in the next 3 months, the majority will only do so in 6-12 months.

Who is interested?



6%

Of those than intend to go overseas in the next year want to have an **river cruise** experience

Those that want an river cruise on their next trip, are more likely to be single/couples with no children households that are older than 65 years old from Canterbury. 18-34 year olds are significantly less likely to be interested in this type of holiday.



Where will they go?



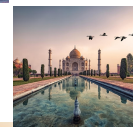
AUSTRALIA
38%

EUROPE
37%



UK
18%

ASIA & INDIA
16%



USA
11%

When will they go?

68%

Of those that want an river cruise intend to go **within 6 - 12 months**

Within the next month **5%**

1-3 months **5%**

3-6 months **22%**

6-12 months **68%**

THANK YOU

This report highlights some key insights but we have a lot more we can share. If you want to find out more, please reach out to your Stuff sales rep or contact:

David Blackwell

Head of Travel
david.blackwell@stuff.co.nz

Stuff



Your expert researchers leading the charge



Amanda Lane

HEAD OF RESEARCH & INSIGHTS

Introducing Amanda Lane. With 20 years of FMCG marketing, research and insight experience acquired both abroad (UK and Switzerland), and locally. She has worked for P&G and Lion Breweries, helping to unlock new markets and increase profit generation. Amanda's passion is inspiring organisation-wide curiosity for understanding consumers and customers and converting this into actionable business strategies and plans.

In her spare time Amanda loves nothing more than getting outdoors; running, skiing or hiking.



Ninon van Huyssteen

RESEARCH & INSIGHTS MANAGER

Introducing Ninon van Huyssteen. She started her market research career at Millward Brown in Cape Town, South Africa and now has more than 8 years of experience spanning both client and research agency (Kantar and Air New Zealand). Working across a breadth of categories from insurance, aviation, FMCG to dairy, and much more, Ninon has a passion for understanding New Zealanders to see how brands can meet their needs. specialising in brand health and equity tracking, reputation, advertising, and concept testing.

After hours, she loves to bake, mountain bike and spend time with her fur babies.



Sarah Hahn

RESEARCH & INSIGHTS MANAGER

Introducing Sarah Hahn. Having spent most of her career in research and insights at non-profits such as Greenpeace, she thrives in environments that are ambitious about their social and environmental impact. More recently, she worked across Air New Zealand's core Customer and Market research programme, delivering insights to Brand, CX, and Commercial teams. She is in her element when telling engaging stories, delivering accessible and actionable insights.

In her free time, she likes to nerd out and spends most weekends playing Dungeons and Dragons.

PARTNER OPPORTUNITY

NOWNEXT
travel

AN INTEGRATED OFFERING

Position your brand as thought leaders in the travel & tourism category by partnering with Stuff's proprietary Travel insights programme.

Inclusions:

- ✓ 3 surveys per annum (November, March, July) - 2500+ responses each;
- ✓ Logo / brand integration across all collateral (2 week promotion);
- ✓ First access to insights - 2 weeks exclusive use;
- ✓ Exclusive opportunity to provide commentary on final insights report, and PR release - distributed to travel trade media;
- ✓ Opportunity to provide commentary for consideration on editorial content;
- ✓ Contribute a custom question for each survey;
- ✓ Generate warm leads through opt-in database acquisition;
- ✓ 1x sponsored article on Stuff.co.nz per survey (thought leadership pieces, utilising findings from survey);
- ✓ \$15,000 in rate-card display advertising for brand to use at discretion.

INVESTMENT:

\$60K (INCLUDES 3 X SURVEYS P/A)

VALUE:

\$120,000+

ROI:

2:1

NOWNEXT
SURVEY

Collaborative, integrated

YOUR FUTURE

Position or strengthen your business as thought leaders in the travel / tourism category.

Use the insights generated to craft a sponsored content series, and to help develop wider business strategy.

S