

travel

NOWNEXT

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

Images Credit: Brook Sabin / Stuff

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NOVEMBER 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



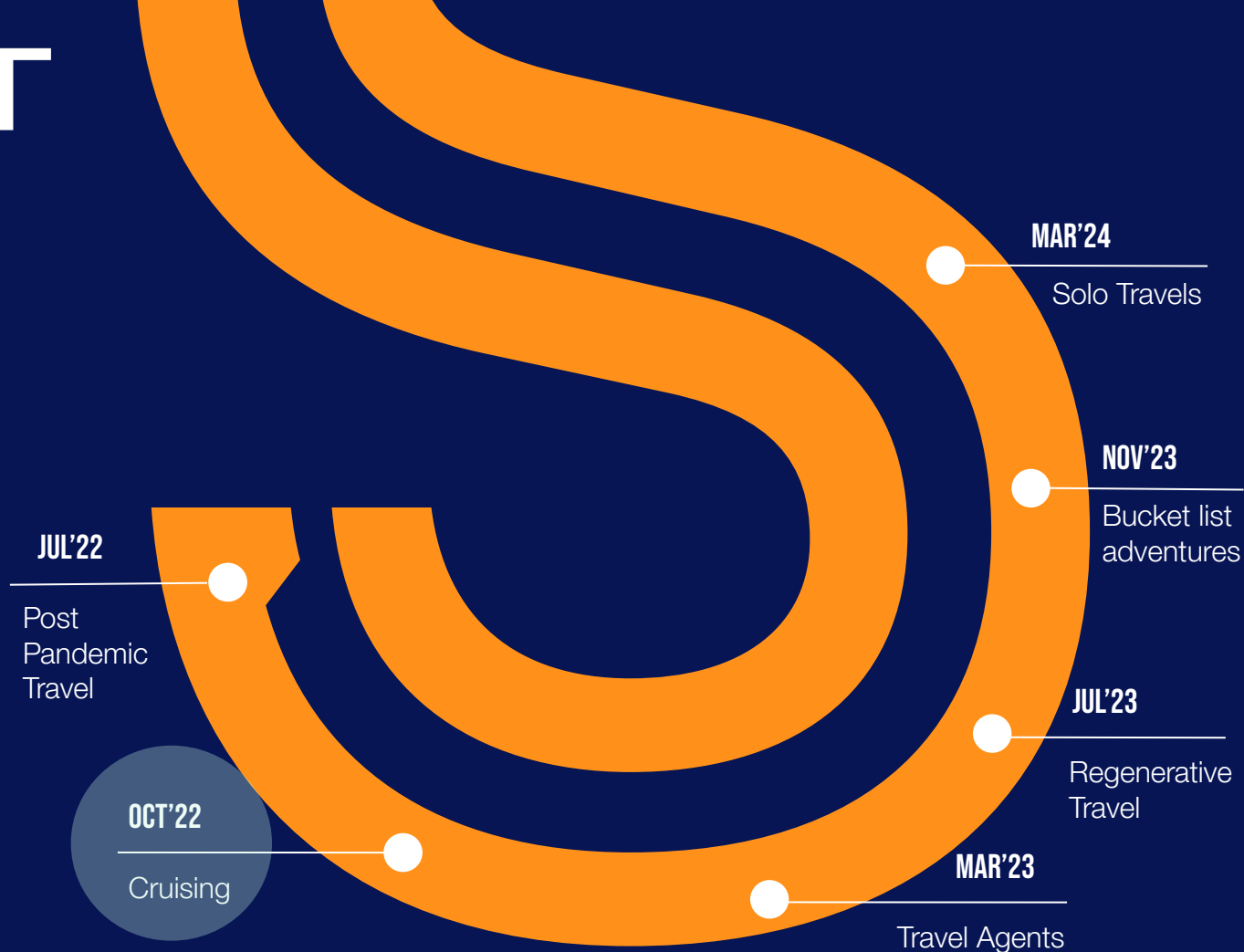
ROBUST SAMPLE SIZE 2200+ PARTICIPANTS

NOWNEXT travel

Kia ora and welcome to our second edition of NowNext Travel report.

Throughout the report we compare results to July '22 to see what has changed. As we head into summer, many of the changes in data are likely due to seasonal trends. The survey will be done 3x a year around the same time so that we can look at seasonality.

Statistically significant changes will be pointed out with ▲▼, otherwise it means no major shifts have occurred.



76%

VS. 73% JUL'22

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

57%

VS. 58% JUL'22

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



CONTENTS

01 Key insights

02 Domestic travel

03 International travel

04 Hot topic: Cruising

KEY INSIGHTS - DOMESTIC

Domestic holidays are showing **no sign of slowing down**. **8 in 10** NZers are intending to **take a trip** in the next 12 months. So, what do we know about domestic travellers?

Close to 60% of domestic travellers say their top reason for taking a holiday is to **rest and relax** whereas for half it's spending time with **friends and whānau** - tap into these need states of peace and quiet and quality time.

Be mindful what is keeping Kiwis from travelling.

Airfares have become a significantly bigger **barrier** over the last 3 months.

Also, there is an opportunity for brands to step in to **inspire** NZers to help those that need help where to visit in Aotearoa.



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DOMESTIC TRAVEL INSIGHTS

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Domestic holidays are showing no sign of slowing down. While we have seen **overall intent** to travel domestically remain **steady**, it's encouraging to see **more people are committing to their travel plans** as significantly more have booked their trip instead of just being in the planning phase.

76%

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



+4

I've already booked



-3

I'm busy planning

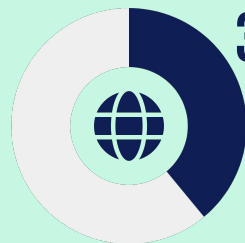


OVERSEAS TRAVEL REMAINS THE #1 BARRIER KEEPING KIWIS FROM TRAVELLING DOMESTICALLY

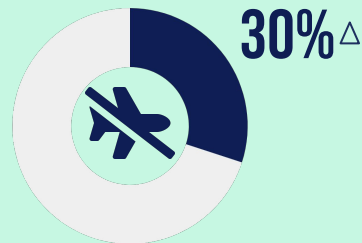
The majority of New Zealanders, who are not intending to travel in the next 12 months, are waiting to travel overseas instead.

As cost of living increases in our nation, concerns over affordability of airfares has doubled (16% vs. 30%) in the last 3 months.

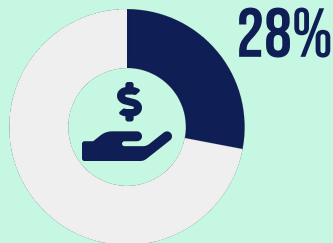
TOP 4 BARRIERS FOR NZ TRAVEL



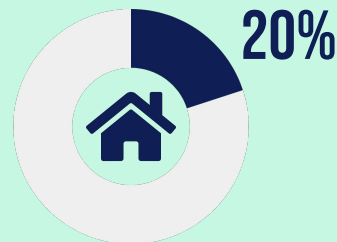
Waiting to travel
overseas




Airfares are too
expensive



Can't afford to



Cost of accomodation

△ Significantly higher / lower compared to July '22 

Source: NowNext Travel Survey, Stuff, October 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 = 167

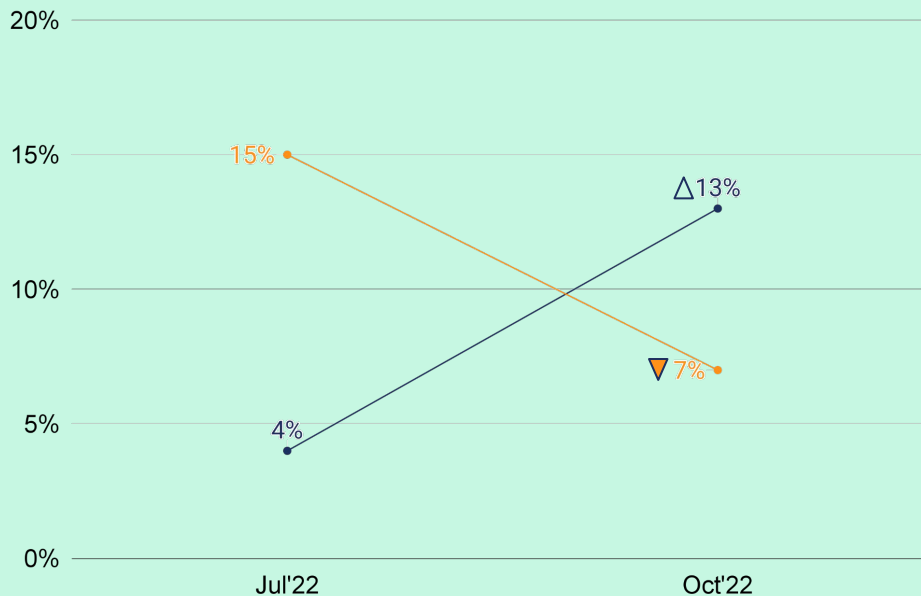
COVID CONCERNS TAKE A BACK SEAT

As New Zealanders learn to live with Covid, not wanting to travel within Aotearoa because of being worried about getting Covid has more than halved and has dropped out of the top 4 barriers.

However, it does look like NZers need a bit of inspiration where to go in our beautiful country as we have spent the last 2.5 years exploring our backyard while waiting for borders to open. A great opportunities for brands to step up here.

travel

- Worried about getting COVID while travelling
- I need inspiration or information to help me decide where to go



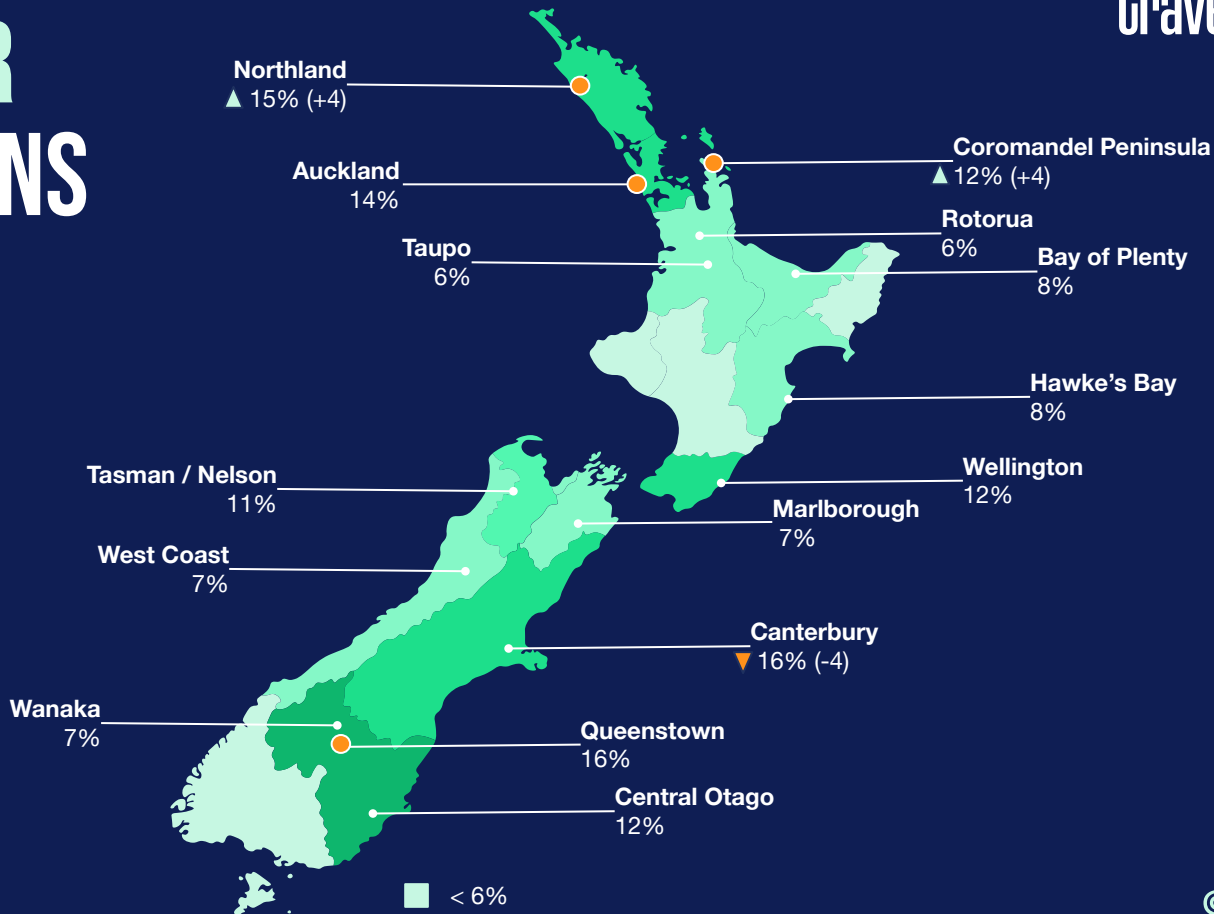
△▽ Significantly higher / lower compared to July '22



Source: NowNext Travel Survey, Stuff, October 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 = 167

MOST POPULAR NZ DESTINATIONS TO TRAVEL TO

Queenstown remains a favourite spot but as summer approaches, coastal areas like Northland and Coromandel Peninsula are more popular than in winter in our previous survey.



GET TO KNOW DIFFERENT KIWIS' DESTINATION PREFERENCES:

Different parts of Aotearoa appeal to different sorts of Kiwis. **Queenstown** is very attractive for **single / couples with no children aged 18-34** whereas a quarter of **Aucklanders** are planning on heading up to **Northland**.



Queenstown

16%

△ Single / No children
18-34 YO's (28%) /
Higher income HHHs
(19%)



Canterbury

16%

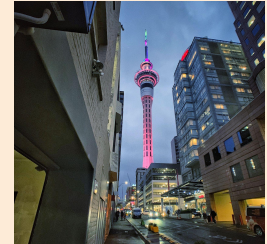
△ 65-74 YO (21%) /
Waikato residents (29%)



Northland

15%

△ Aucklanders (23%)



Auckland

14%

△ Wellingtonians (23%)

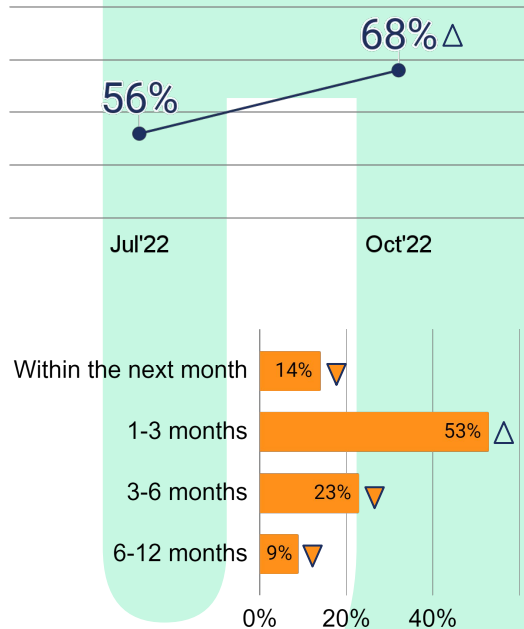
THINKING ABOUT THEIR NEXT TRIP WITHIN NZ ...

With school / university holidays approaching and the festival seasons, 7 in 10 Kiwis are planning on taking a holiday in the next 1-3 months.

This also means New Zealanders are planning a slightly longer holiday this time compared to when we asked them in July with 1 in 3 saying their trip will be longer than a week.

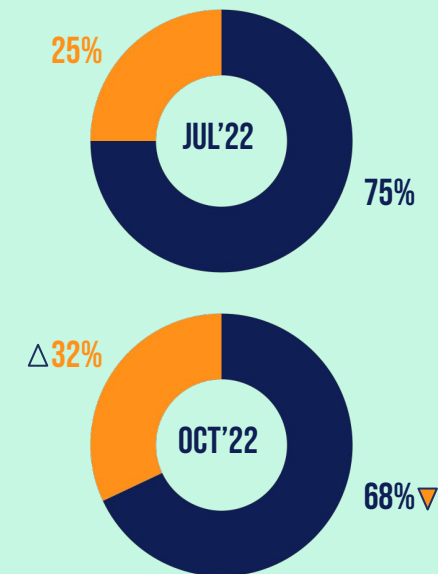
When will they go?

- Within next 3 months



Duration

- Shorter trips, up to a week
- Longer than a week



Δ Significantly higher/lower compared to
 ∇ July '22(95% confidence level)

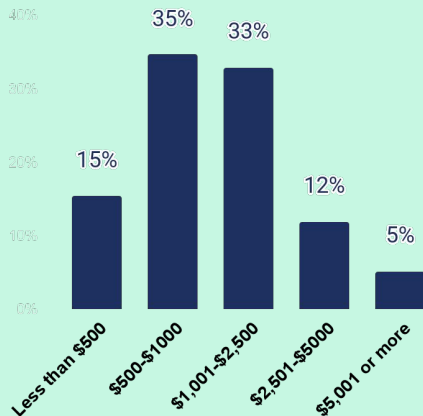
THINKING ABOUT THEIR NEXT TRIP **WITHIN NZ** ...

How much will they spend?

Most NZers plan to spend **anywhere between \$500 to \$2500** on their next trip. This is similar to our previous survey results.

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

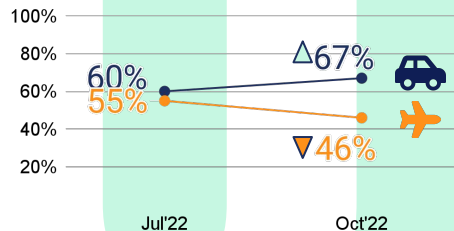
Women intend to be **more thrifty** than men on their next trip, with 20% intending to spend less than \$500 vs 11% of men.



How will they get there?

While spending has remained the same, Kiwis are changing up their mode of transport. With soaring airfares, it's no surprise significantly **fewer** NZers will be **flying but instead taking the car** to get to their next holiday.

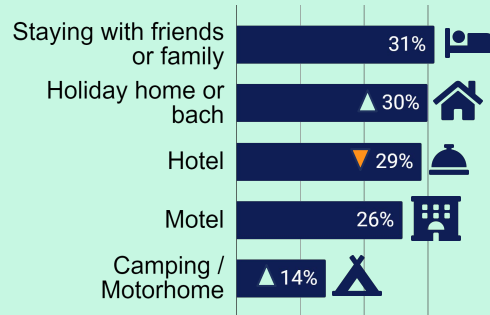
Younger solo travellers are more likely to **fly** whereas those that normally travel with their **partner and children** will be making the trip by **car**.



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.

More Kiwis are opting for more cost-effective accommodation this time around - holiday home and camping / motorhome rather than a hotel.



▲ Significantly higher/lower compared to
▽ July '22 (95% confidence level)

8% LUXURY AND PAMPERING

The only experience to have changed significantly since July is luxury and pampering (12% vs. 8%) - potentially because of rising cost of living.

9% CAMPING / MOTORHOME

While camping / staying in a motorhome isn't everyone's cup of tea but **families with children aged 5-12** are twice as keen as others (19%).

10% HEALTH AND WELLBEING

Females are almost **twice as more likely** to opt for a health and wellbeing break compared to men (13% vs. 8%).

17% SHOPPING & CITY EXPERIENCES

Those **from the regions** are more likely to seek out shopping & city experiences (23%).

57% REST AND RELAXATION

Rest and relaxation is **top of the list for all** New Zealanders as we are getting to the end of the year and need to recharge for 2023.

50% TIME WITH FRIENDS/WHĀNAU

Family time is important for many but even more so for **35-44 YO's** (61%) with **school aged children** (71%) and **Māori** (72%)

46% OUTDOORS & ADVENTURE

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

35% ROAD TRIPS & TOURING

A third of NZers want to hit the road for their next trip but it's **unlikely** it will be **families with young children** (<5 YO) (20%)

EXPERIENCES NEW ZEALANDERS SEEK IN NZ



Significantly higher/lower compared to July '22 (95% confidence level)

ACTIVITIES NEW ZEALANDERS WILL BOOK IN NZ

15% CYCLING & MOUNTAIN BIKING

45-54 YO (21%) / **High income earners** (20%) are most enthusiastic about cycling and mountain biking.

18% ARTS, CULTURE & HERITAGE

NZers from all demographics show similar levels of interest in cultural experiences, though **households with 5-12 YOs** are less likely to prefer this (8%)

▼24% URBAN SIGHTSEEING

Older NZers (75+ YO) are more likely to seek out urban attractions and sightseeing (34%). **Young (18-34 YO) singles or couples without children** are least likely to select this category (13%).

26% FAMILY FRIENDLY ACTIVITIES

Preference for this category is mainly driven by **households with children aged 5-12 YO** and is their activity they are most interested in (60%)

55% FOOD & DRINK

Food and drink remain the #1 activity for Kiwis and for **single / couples aged 18-34 with no children** this is by far their favourite (69%).

▲45% NATURE, OUTDOORS & WILDLIFE

As summer approaches, spending more time in the outdoors has **increased** from July (40% vs. 45%). Nature experiences are more popular with **35-44 YOs** (52%) / those with **school aged children** (52%)

▲44% WALKING & HIKING

Walking and hiking has also **increased** over the last 3 months (38% vs 44%) **Women** are more likely to look forward to it than men (48% vs. 40%) whereas it's less popular for those from the regions (38%).

▼28% HOT POOLS & SPA

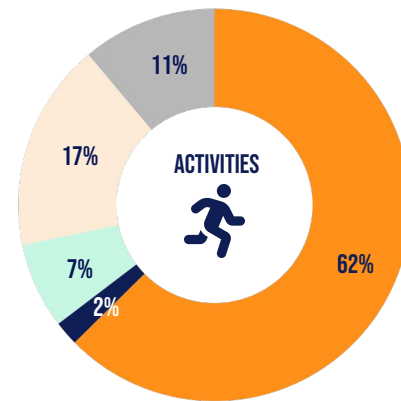
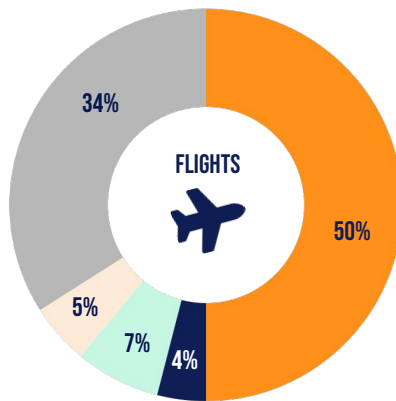
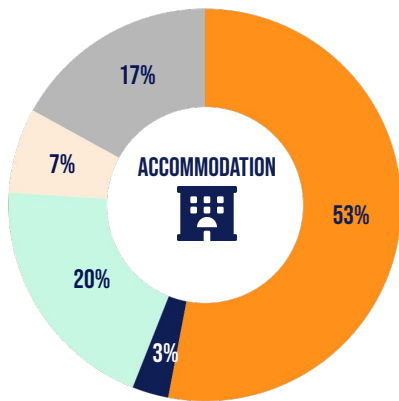
Now that winter has passed, hot pools and spa experiences are **not as popular** as back in July but a third of **18-34 YOs** (35%) are still keen on it.

HOW ARE KIWIS BOOKING THEIR DOMESTIC HOLIDAYS?

Most NZers are mainly booking directly for all aspects of their domestic holiday. Online travel agencies are most likely to be used for accommodation if needed.

Age plays a huge role in choosing channels to book. Retail travel agents are used significantly more with age whereas direct skews significantly younger.

● Direct ● Retail travel agency* ● Online travel agency* ● Haven't decided ● DK / NA



An aerial photograph of a vineyard in a warm climate. A winding asphalt road cuts through the rows of grapevines. Several palm trees are planted along the road. The ground is reddish-brown, suggesting a dry or semi-arid region. The vineyard rows are organized in a grid-like pattern, with some areas showing more mature vines and others with younger plants.

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INTERNATIONAL TRAVEL INSIGHTS

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KEY INSIGHTS - INTERNATIONAL

Intent to travel **overseas** has also **remained steady** with 6 in 10 NZers intending to take a trip in the next 12 months. So, what do we know about overseas travellers?

Aucklanders, higher income earners and those aged **65-74** year olds are most likely to travel overseas. Pay special attention to this segment for marketing. **Australia, Europe and India and Asia** are **key** destinations at the moment.

While fewer are worried about Covid, **affordability** is a major **barrier** for overseas travel - special deals can help stimulate demand. Lastly, know travellers' needs - they want to **rest and relax** while **catching up** with those close to them.

WHO WILL TRAVEL INTERNATIONALLY IN THE NEXT 12 MONTHS?

AGE GROUP 65-74

65%

are most likely to travel
overseas from all age
groups

AUCKLANDERS

63%

intending to travel,
significantly more than
other regions

GREATER
HOUSEHOLD
INCOMES (>120K)

up to 2x

as likely to have booked
overseas travel than
lower HHI

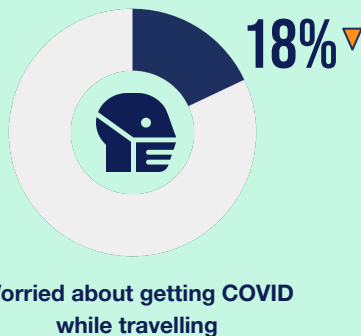
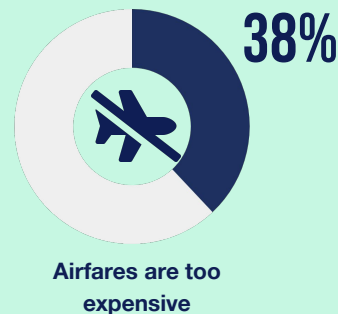
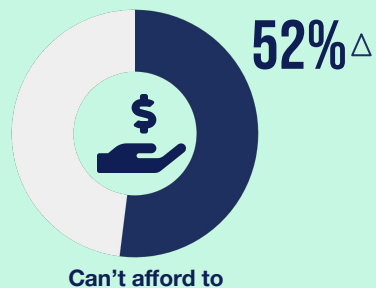
2 IN 5 KIWIS DON'T INTEND ON TRAVELLING INTERNATIONALLY IN THE NEXT YEAR

As cost of living increases and remains a key concern here in Aotearoa, affordability is the main barrier why overseas travel is not on the cards for many New Zealanders. This is particularly an issue for 35-44 year olds as 7 in 10 say this is why they are not going overseas - target this audience with more affordable holiday options / deals etc.

Similar to domestic travel, Covid is becoming significantly less of an issue and has halved over the last 3 months. While it's becoming less of a concern, be mindful that for older Kiwis (55+ YO) it's more of a barrier than for other age cohorts, particularly as we have seen an uptick in local Covid cases recently.

Source: NowNext Travel Survey, Stuff, October 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 = 457

TOP 4 BARRIERS FOR INTERNATIONAL TRAVEL



[△] Significantly higher/lower compared to July '22 (95% confidence level)
[▽]

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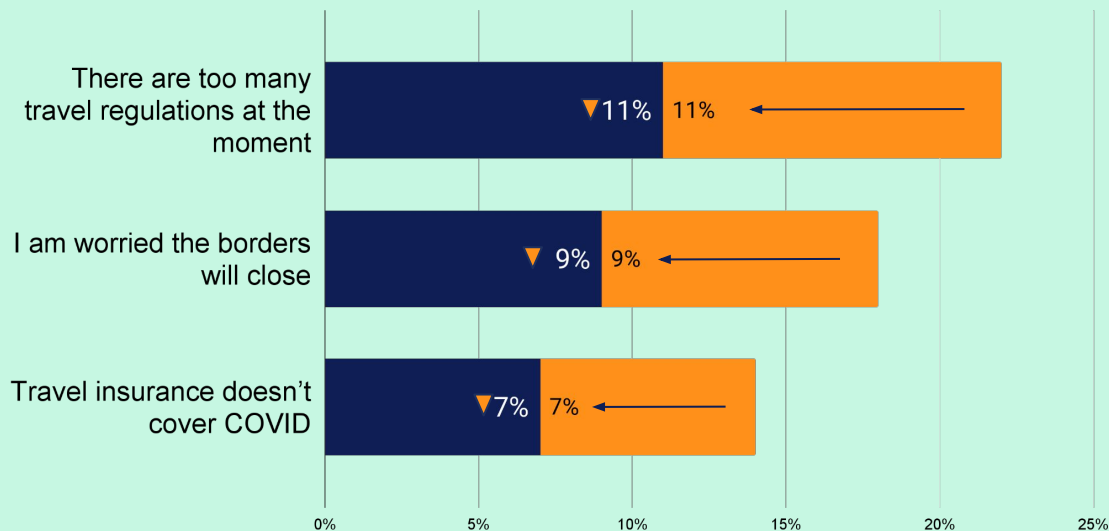
OTHER COVID BARRIERS ALSO TAKE A BACK SEAT FOR NOW

Similar to what we are seeing for domestic travel, Covid is becoming less of a barrier when it comes to why Kiwis are not wanting to travel overseas - in fact these concerns have halved over the last 3 months.

Source: NowNext Travel Survey, Stuff, October 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 = 457

travel

- October 2022
- Difference from July 2022



△ Significantly higher/lower compared to July '22 (95% confidence level)

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THINKING ABOUT THEIR NEXT TRIP OVERSEAS ...

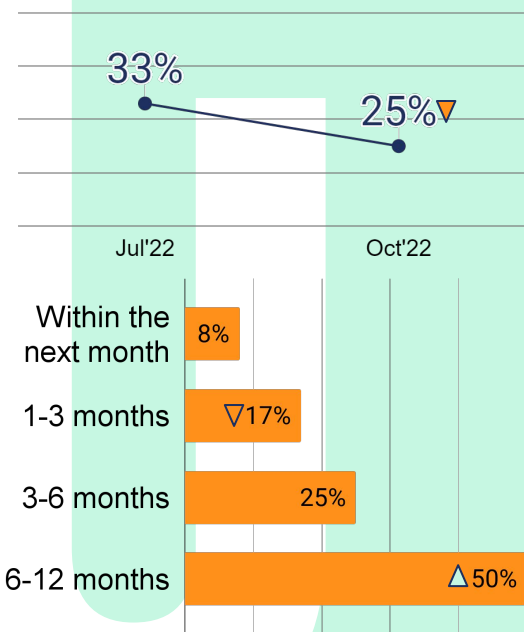
While overall overseas travel intent has remained similar to July levels, **travel is being pushed out** from within the next 1-3 months to now rather in the next 6-12 months. This seems to be **driven by 55-64 YO**s with almost 6 in 10 of them only going to travel in 6+ months.

Long-term travel plans are also seen for the **UK** (63%) and **Europe** (70%) - potentially because NZers have recently made that trip.

Families with middle-aged children (5-12) are more likely to only for **6-7 days** whereas **65+ year olds** for **more than 2 weeks**.

When will they go?

WITHIN NEXT 3 MONTHS



Duration of travel

34%

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

1 in 3 families with middle-aged children (5-12) will only go away for a 6-7 days whereas 65% 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.



Significantly higher/lower compared to July '22 (95% confidence level)

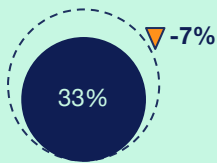
KIWIS TAKING FLIGHT

5 MOST POPULAR INTERNATIONAL DESTINATIONS

Our Aussie neighbours are still Kiwis top pick to visit but less so compared to 3 months ago (40% vs. 33%). Instead, we are seeing preference for Asia and India growing with now 1 in 5 visiting there over the next 12 months.



AUSTRALIA



EUROPE



ASIA AND INDIA



FIJI



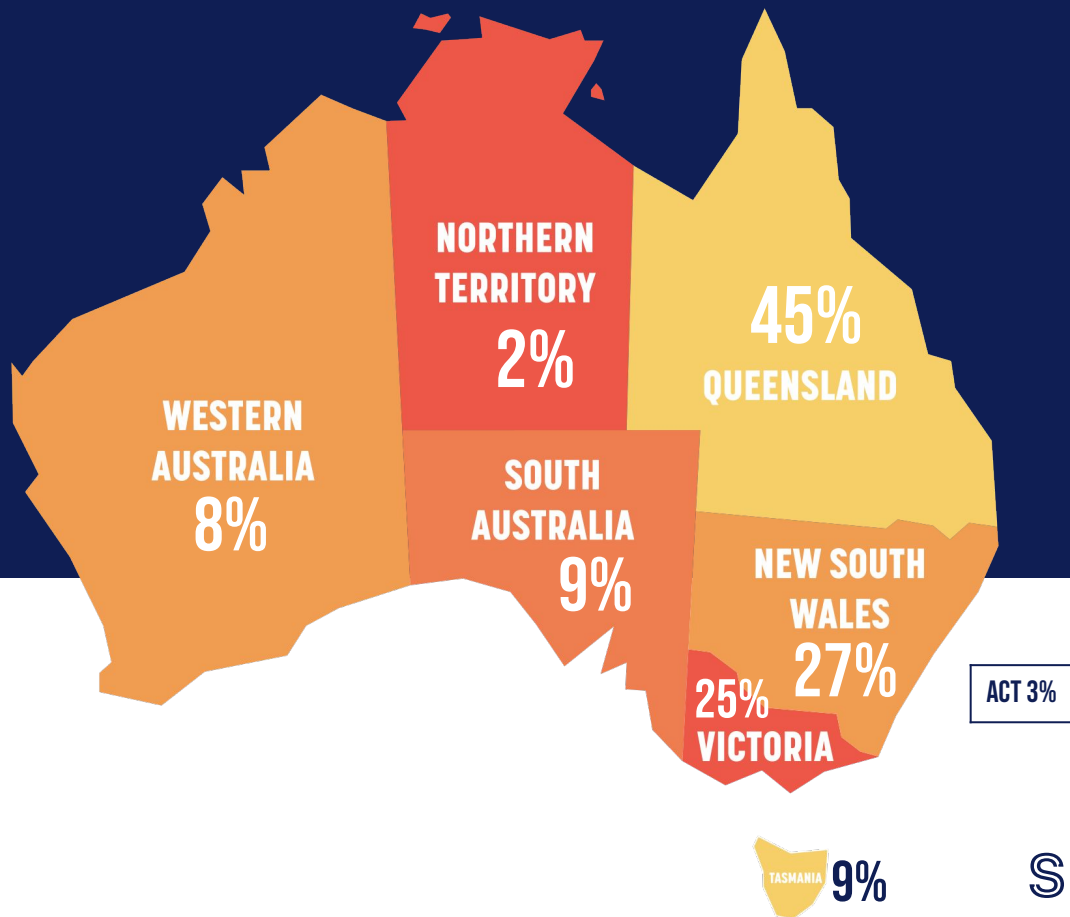
UK



WHERE IN *AUSTRALIA* ARE KIWIS WANTING TO GO?

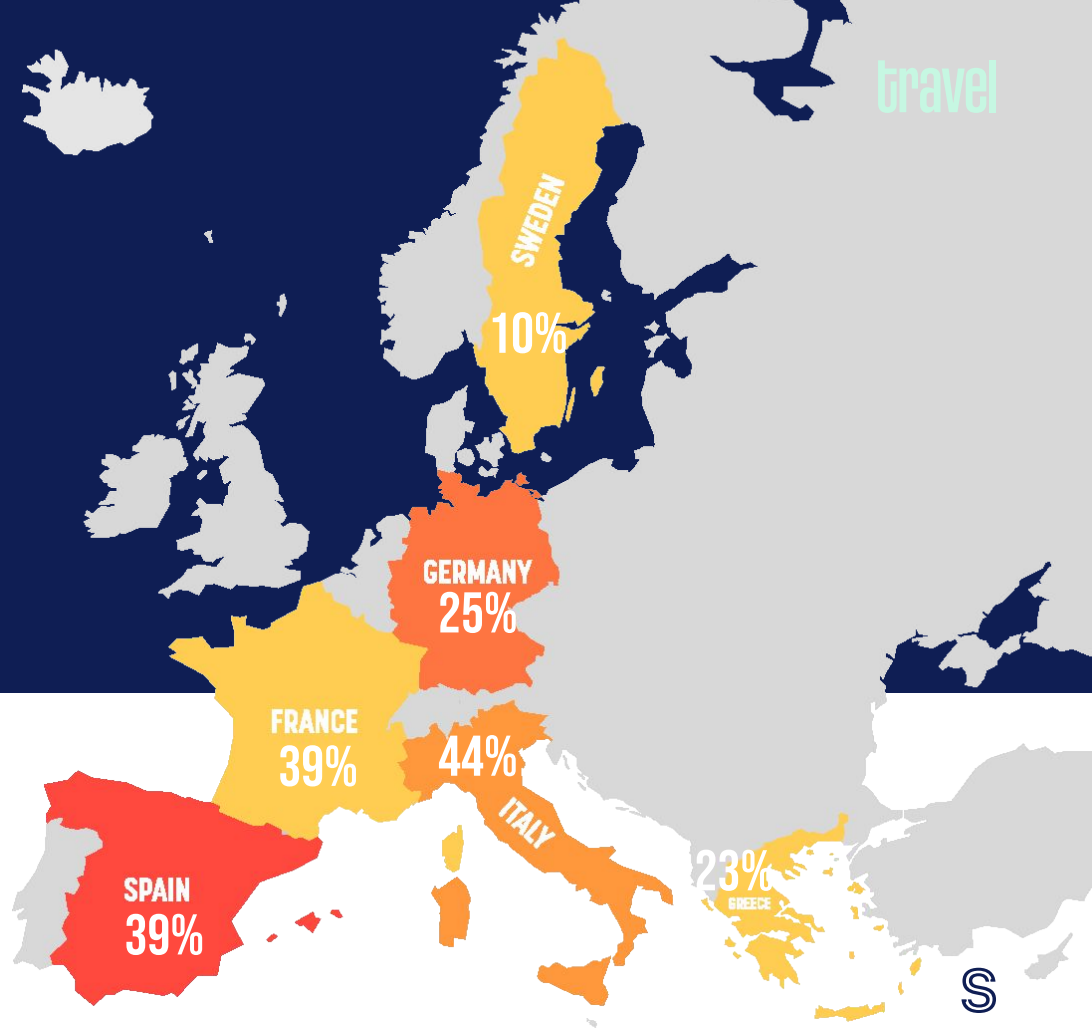
Capitalise on Kiwis' hot spots in Australia at the moment - almost half want to go to Queensland and that's even higher (63%) for families with school aged 5-12 years old children.

Appeal for NSW is 1.5x higher amongst males compared to females (33% vs. 20%) whereas Victoria skews towards group flatters.



WHERE IN *EUROPE* ARE KIWIS WANTING TO GO?

At the moment, it's all about Italy, France and Spain / Portugal for Kiwis that are planning on going to Europe in the next 12 months.

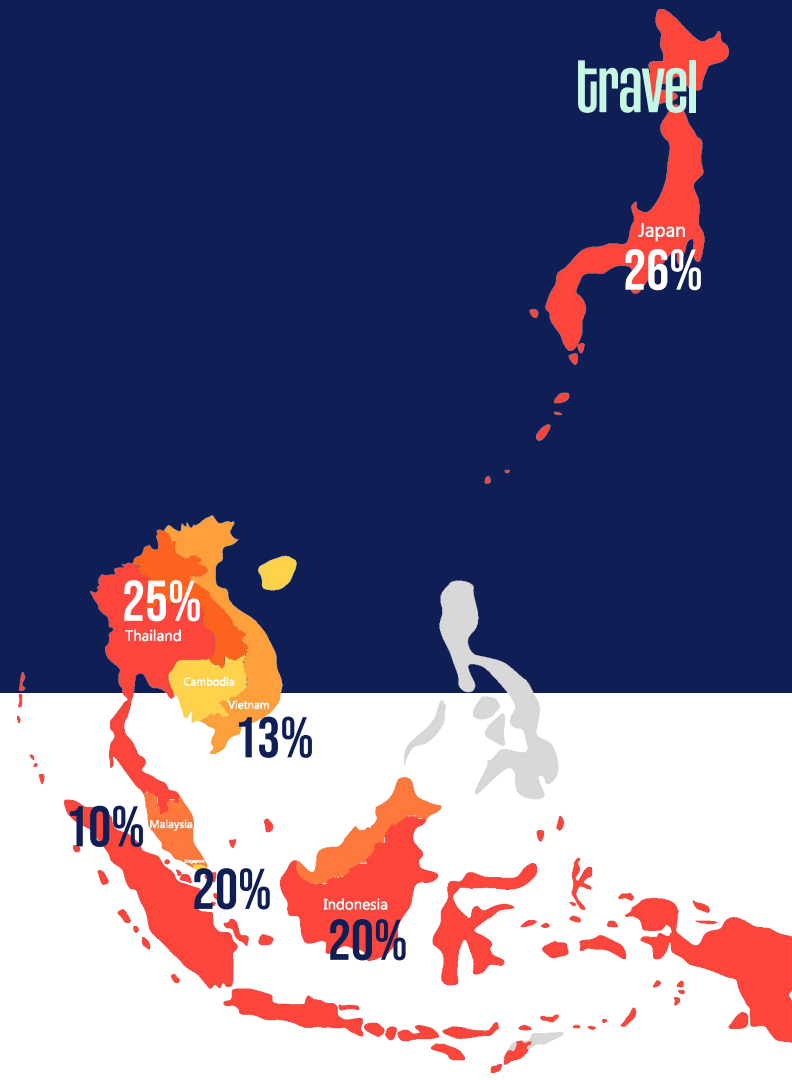


WHERE IN ASIA AND INDIA ARE KIWIS WANTING TO GO?

Preference for India and Asia has grown over the last 3 months - now with 1 in 5 Kiwis planning on visiting there, with it being even higher for 18-34 year olds (29%)

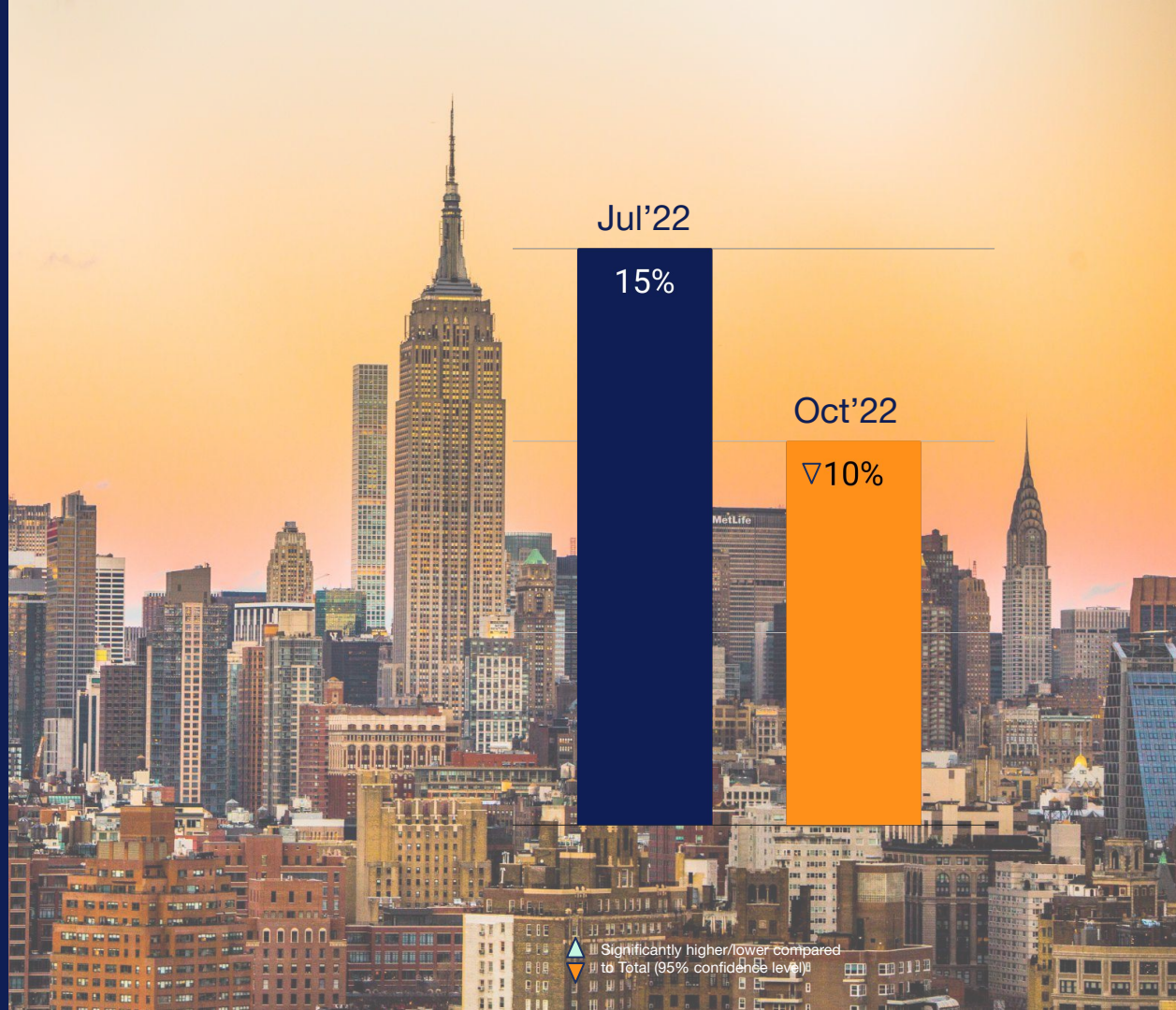
Japan is the favourite - possibly as we have seen the NZD strengthen to Yen. Thailand is in second place, offering a cheaper option for NZers.

Source: NowNext Travel Survey, Stuff, October 2022; N = 170



USA DROPS OUT OF TOP 5 OVERSEAS DESTINATIONS

USA has similar levels of appeal amongst most cohorts, whether it's gender, where they are from or the life stage they are in with the exception of 75+ year olds - only 4% said this would be their next holiday.



8% OCEAN CRUISING

Ocean cruising has made it into the top 8 and increases in appeal with age. The rest of the report will go into more detail for cruising to stick around.

16% LUXURY & PAMPERING

While pampering isn't isn't for all, we see higher appeal as **household income increases** and is something travellers going to **Fiji / Cook Islands** are looking forward to (31%).

17% GUIDED TOUR

Guided tours are twice as popular amongst those **intending to go to Europe** (29%).

30% ROAD TRIPS & TOURING

A third of international travellers are wanting to go on a road trip, particularly if planning on going to the **UK** (46%), **Europe** (43%) and **USA** (45%).

EXPERIENCES NEW ZEALANDERS SEEK OVERSEAS

54% 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.

▽43% TIME WITH FRIENDS/WHĀNAU

Many Kiwis have had the opportunity to catch up with friends and whānau by now, which is likely why we have seen a **major decline**. However, it's still the second most important reason for going abroad, particularly **more so for females** than males (50% vs. 37%).

▽41% SHOPPING & CITY EXPERIENCES

With people's budgets stretched at the moment, shopping overseas is now less of a reason to go there. Those that do still want to do shopping largely skews towards 45-54 YO (49%) and households with children aged 13-18 YO (54%).

38% OUTDOOR & ADVENTURE

Outdoor and adventure experiences remain within the **top 4** reasons to go overseas **except** for those older than 65 YO.

▲ Significantly higher/lower compared to July '22 (95% confidence level)
▼

21% THEATRE, ARTS & CULTURE

Theatres made it into the top 8 this time and is similarly appealing amongst all groups, it's households with young children (<5 YO) least interested whereas with adult children most interested (28%).

22% FAMILY FRIENDLY ACTIVITIES

It's no surprise that this skews towards families but it's **households with children aged 5-12 years** old are more than 3x (68%) more likely to be interested in this and **Māori** (40%).

30% WALKING & HIKING

This activity is highly appealing to **18-34 year olds** (42%).

31% ARTS, CULTURE & HERITAGE

Destination plays a big role in whether travellers are interested in this category: Those that intent to go to **Asia and India** (42%) and **Europe** (43%) are much more interested than those going to Australia (24%), Fiji (15%) or Cook Islands (16%).

ACTIVITIES NEW ZEALANDERS WILL BOOK OVERSEAS

56% FOOD & DRINK

While food and drink has declined, NZers are still most about international food and drink experiences and is particularly popular with **18-34 year olds** (64%).

45% URBAN SIGHTSEEING

Females are much more keen on urban sightseeing in foreign countries compared to men (49% vs. 40%) as well as those interested in going to **UK** (55%), **Europe** (58) and **USA** (62%).

38% NATURE, OUTDOORS & WILDLIFE

Cantabrians (48%) were more likely to select this category and declines in popularity with age.

32% RESORT, BEACH AND POOL

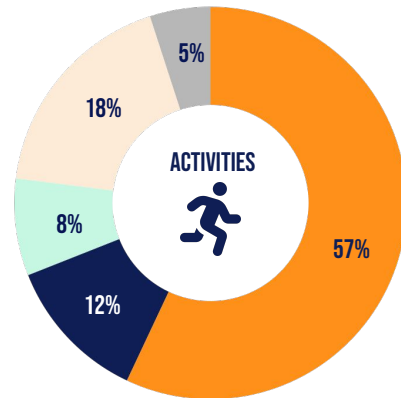
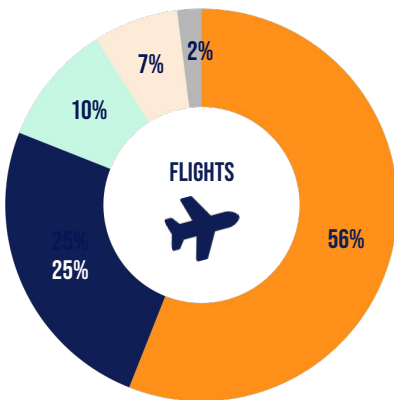
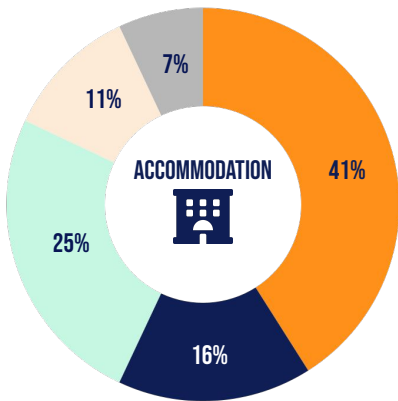
Families with middle aged children (5-12) are twice as likely (57%) to book this activity on their next overseas trip.

HOW ARE KIWIS BOOKING THEIR OVERSEAS HOLIDAYS?

When it comes to overseas holidays, booking directly is still the preferred way to book all aspects of holidays but retail travel agencies are used almost **6x** more compared to domestic trips. When it comes to travel agencies, retail ones are more likely to be utilised for flights whereas online for accommodation.

Age plays a huge role in choosing channels to book. Retail travel agents are used significantly more with age whereas direct skews significantly younger.

Direct Retail travel agency* Online travel agency* Haven't decided DK / NA



Source: NowNext Travel Survey, Stuff, October 2022; Q: "How will you book the following for this trip?"; N = 1332

*Retail Travel Agency e.g. House of Travel, Flight Cent

*Online Travel Agency e.g. Booking.com, Expedia etc.



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CRUISE INSIGHTS

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KEY INSIGHTS - CRUISES

We added a hot topic on **cruising** in Oct'22. The three **biggest reasons for going on cruises** are **destination(s)**, price / **package** offerings and **itinerary** (i.e. length of cruise, excursions, etc).

Kiwis love a good deal and this is the most persuasive way to get them over the line to book a cruise, even more so for 35-44 YO's / families with pre-teen children (5-12 YO).

Lastly, NZers are put off by the idea of crowded areas on cruises and that it's just not for *people like them*. Imagery can help here - open spaces with diverse groups when advertising cruising can help with these concerns.

WHO HAS BEEN ON CRUISES?

More than a third of Kiwis have been on / booked a cruise before, with most of them boarding from overseas.

Cruises appeal more to certain demographics - more than 6-in-10 aged 65+ have been on / booked a cruise before.

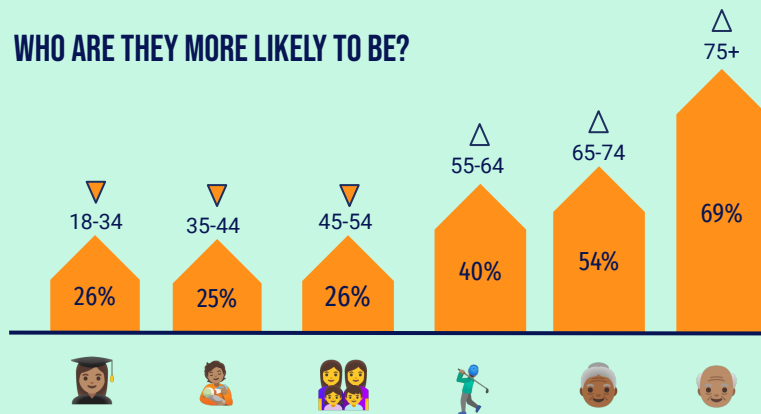
How many?



34%

Of Kiwis have been on / booked a cruise before

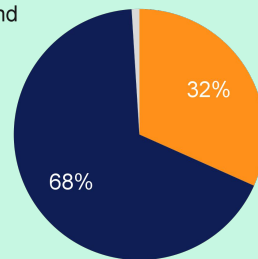
WHO ARE THEY MORE LIKELY TO BE?



- △ Asian (47%)
- △ Those travelling overseas for holidays with friends (42%)
- △ Those going to Australia for their next overseas holiday (48%)

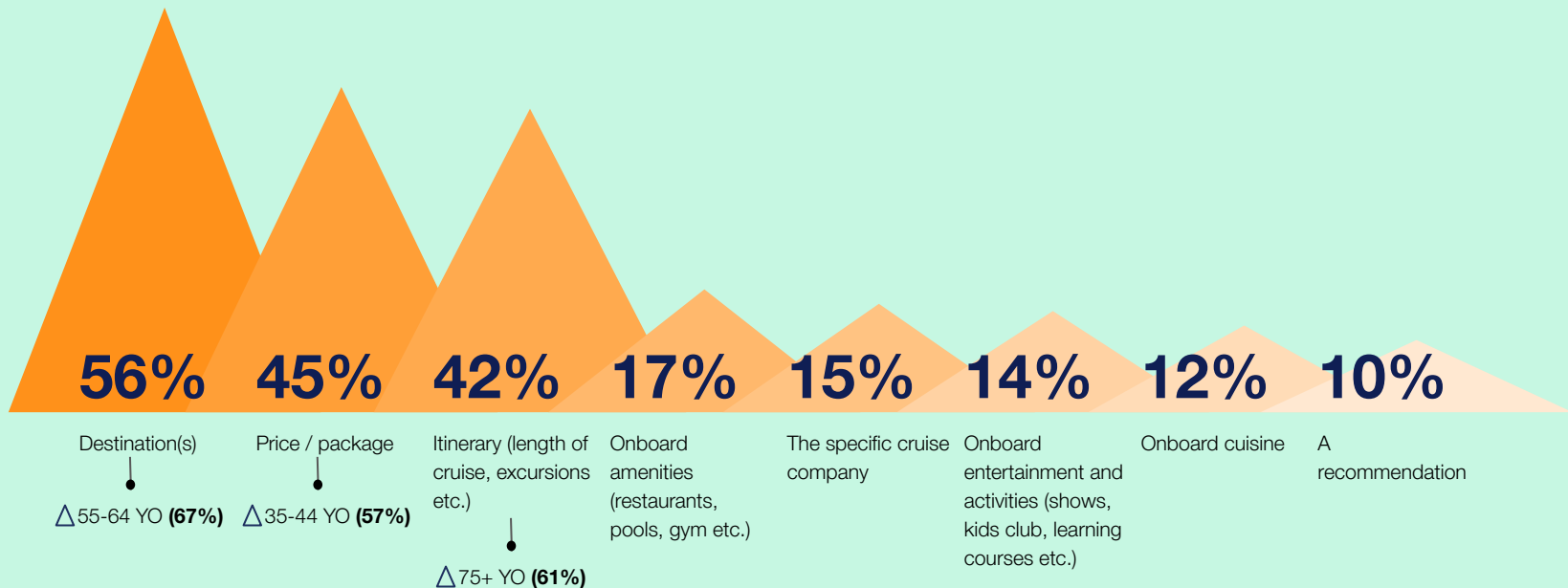
WHERE DID THEY BOARD FROM?

- New Zealand
- Overseas
- Don't know



WHAT DRAWS KIWIS TO CRUISING?

The three biggest reasons for going on cruises are destination(s), price / package offerings and itinerary (i.e. length of cruise, excursions, etc). Take note of how your strategy can be more targeted with these key messages for certain age groups.



TOP 7 WAYS TO MOTIVATE PEOPLE TO GO ON A CRUISE

1

45% SPECIAL DEALS

Kiwis love a good deal and this is the most persuasive way to get them over the line to book a cruise, even more so for 35-44 YOs (54%) / families with pre-teen children (5-12 YO) (60%).

2

42% OFFERING EXCITING DESTINATION

Promote that the destinations are exciting. Females are also more receptive to this (46% vs. 38% for Males).

3

37% BEING ALL-INCLUSIVE

A third of NZers would be motivated to book a cruise if it's all-inclusive and it's again the more budget conscious families with middle aged children (5-12 YO) (56%) that this messaging would work for.

4

29% HAVING EXCELLENT FOOD AND BEVERAGES

Having excellent dining experiences appeals to a third, particularly the younger ones (18-34 YO 35%).

5

23% SMALLER / INTIMATE SHIPS

Having smaller ships isn't the most important for many but it's twice as important for those aged 65-74 YO (41%).

6

14% ENTERTAINMENT ON BOARD

Great entertainment is more appealing for younger Kiwis (18-34 YO 22%).

7

13% KNOWING IT'S ENVIRONMENTALLY- FRIENDLY CRUISE

An environmentally-friendly cruise will motivate 1 in 10 NZers and is significantly more important for younger.



travel

OCEAN CRUISE INSIGHTS

Brought to
you by Stuff

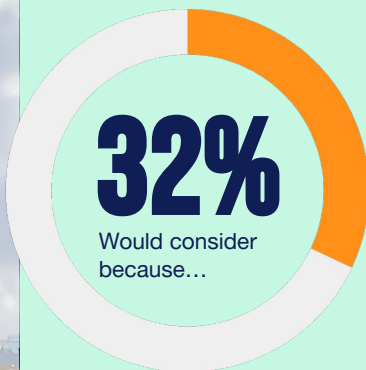


WHAT DRAWS PEOPLE TO OCEAN CRUISING?

A third of New Zealanders are considering an ocean cruise in the future.

Focus messaging on what people like - all-inclusive and seeing several destinations quickly - these are the main 2 reasons.

To attract the younger ones, they are more interested in having everything arranged for them and while at an overall level “I can see the world without flying” didn’t make it into the top 5, this is another key reason for 18-34 YOs to go on a cruise.



TOP 5 REASONS

travel



It's all inclusive

△ 75+ YO (81%)



I can see several destinations in a short amount of time

△ 55-64 YO (70%)
Female (67%)



I only have to unpack once

△ 65+ YO (74%)



Everything is arranged for me

△ 35-44 YO (61%)



It's good value for money

△ 65+ YO (54%)

WHO ARE MORE LIKELY TO CONSIDER OCEAN CRUISES?

Travelling to Australia next 44%

Travelling with parents overseas for holiday 44%

Family households with oldest child 13 - 18 YOs 41%

Those travel with other family members within NZ for holiday 39%

Thinking about future trips, whether in New Zealand or overseas, how likely are you to consider ocean cruising. What is it about ocean cruising that you like? (Select all that apply)

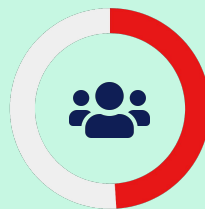
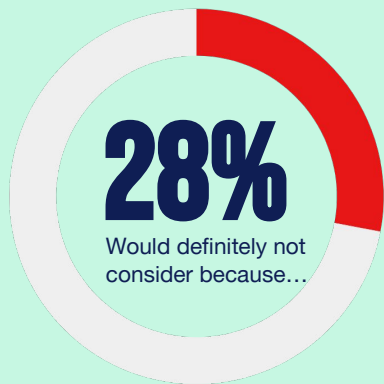
△ Significantly higher/lower compared to Total (95% confidence level)

WHAT KEEPS PEOPLE FROM OCEAN CRUISING?

Oppositely, Kiwis are put off by the idea of crowded areas and that it's just not for people like them. Imagery can help here - open spaces with diverse groups when advertising cruising can help with these concerns.

TOP 5 REASONS

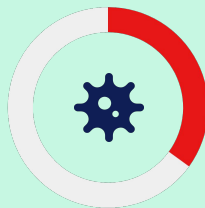
travel



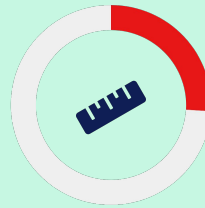
Too crowded, too many people



It's not for people like me



Covid put me off cruises



There is no flexibility of what you can do

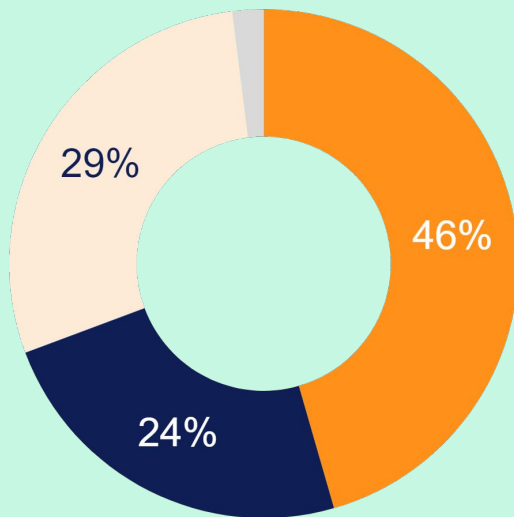


It's normally too expensive

THERE IS DEMAND FOR MORE CRUISES FROM HOME.

A third of Kiwis that have been on a cruise departed from NZ however, after asking for their preference, half would like to actually do so from Aotearoa.

- Departing from New Zealand
- Departing from overseas
- Don't mind
- Don't know



A scenic view of a river at dusk. In the foreground, a dark riverboat with lights is moving along the water. The background features a large, historic cathedral with two prominent spires, likely Cologne Cathedral, under a sky with soft orange and blue hues. A bridge is visible on the left side of the river.

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RIVER CRUISE INSIGHTS

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WHAT DRAWS PEOPLE TO RIVER CRUISING?

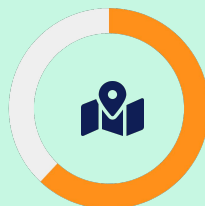
A third of New Zealanders are considering a river cruise in the future.

Focus messaging on what people like - seeing several destinations quickly and being all-inclusive - these are the main 2 reasons.



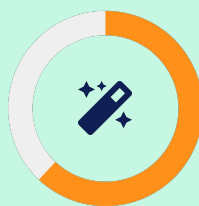
TOP 5 REASONS

travel



I can see several destinations in a short amount of time

△ 55-74 YO (74%)



It's all inclusive

△ 65+ YO (61%)



I only have to unpack once

△ 65+ YO (66%)



Everything is arranged for me

△ 75+ YO (58%)



There is variety to choose from

WHO ARE MORE LIKELY TO CONSIDER RIVER CRUISES?

Hawkes's Bay residents	44%
55+ YO	41%
Travelling to Australia next	39%

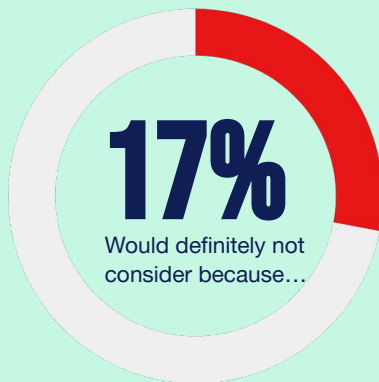
△ Significantly higher/lower compared to Total (95% confidence level)

WHAT KEEPS PEOPLE FROM RIVER CRUISING?

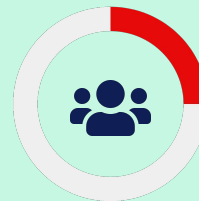
Oppositely, Kiwis are put off by the idea of crowded areas and that it's just not for people like them. Imagery can help here - open spaces with diverse groups when advertising cruising can help with these concerns.

travel

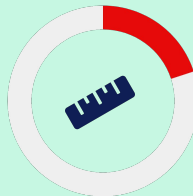
TOP 5 REASONS



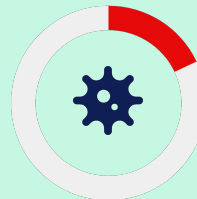
It's not for people like me



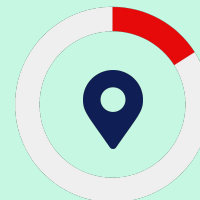
Too crowded, too many people



There is no flexibility of what you can do



Covid put me off cruises



I don't like the destinations

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



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:

\$30K (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

WE SURVEY A NATIONALLY REPRESENTATIVE SAMPLE OF NEW ZEALANDERS

By gender

Female

52%

Male

48%

By age

18-34

30%

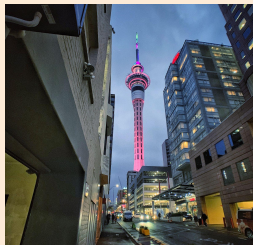
35-54

38%

55+

32%

By region



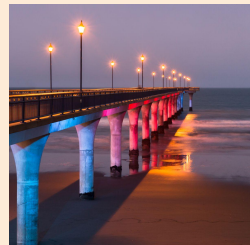
Auckland

33%



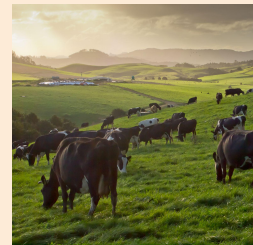
Wellington

11%



Christchurch

13%



Regional NZ

43%

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.



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). At Air New Zealand she led the brand tracker that looked at travel trends and category drivers as well as segmentations that unpicked traveller needs and behaviour. Ninon has also been responsible for Stuff's Travel research over the last year.



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 global Customer and Market research programme, delivering travel insights to Brand, CX, and Commercial teams. She is in her element when telling engaging stories, delivering accessible and actionable insights.



Michael Chan

TECHNICAL RESEARCH MANAGER

Introducing Michael Chan. He has more than 10 years of market research experience across Asia Pacific from both client and research agency perspectives. Michael started his career in market research in Nielsen Hong Kong. After moving back to New Zealand, Michael pursued a postgraduate honours degree specialising in statistics for market research while working for Fairfax Media (now Stuff). Michael's work was well recognised by his clients while working for Kantar across different categories including travel, financial services, pharmaceutical, public sector and telecommunications.