

Holiday Parks - Key Insights - February 2024

Holiday Park share of traditional commercial accommodation market YE Dec 2023 adp

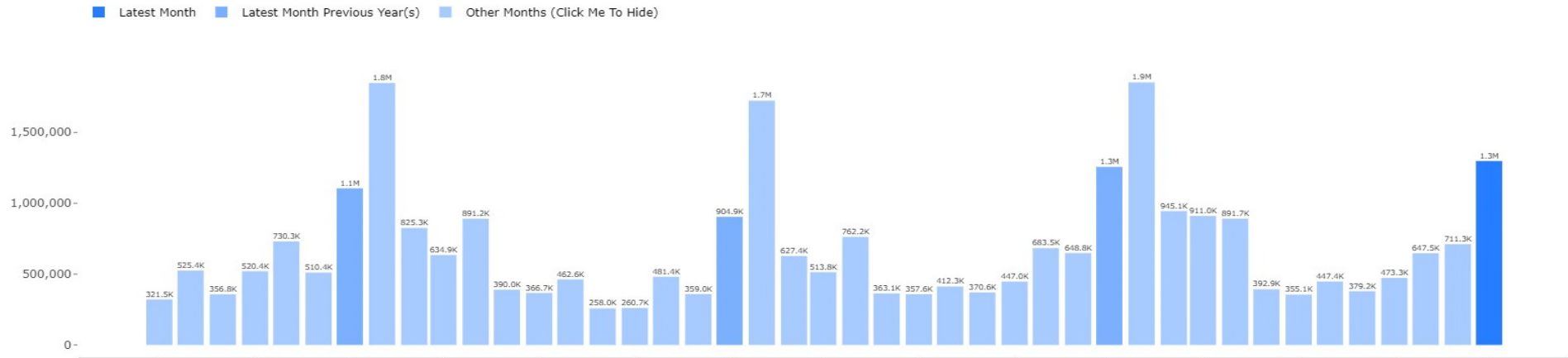
	Guest Nights	Market Share	Occupancy	Avg. Nights per guest
Holiday Parks	9,306,100	24%	30%	2.2
Hotels	14,089,300	36%	69%	1.9
Motels	11,179,300	29%	70%	2.3
Backpackers	2,888,000	7%	64%	2.4
Lodges & boutique Accommodation	1,305,400	3%	52%	1.9
Total Guest Nights	38,768,100			

	YE Dec 2023 Guest Nights	YE Dec 2022 Guest Nights	% Change
Holiday Parks	9,306,100	8,167,400	13.9%
Hotels	14,089,300	9,931,000	41.9%
Motels	11,179,300	9,816,200	13.9%
Backpackers	2,888,000	1,701,500	69.7%
Lodges & boutique Accommodation	1,305,400	1,008,200	29.5%
Total Guest Nights	38,768,100	30,624,500	26.6%

Domestic International Split

	YE Dec 2023 Guest Nights	YE Sep 2019 Guest Nights
Domestic	77%	68%
International	23%	32%
Total Guest Nights	9.3m	8.4m

Seasonality: Holiday Park Guest Nights by Month (adp)



Holiday Parks Regional View: YE Dec 2023

RTO	Guest Nights	Market Share*
Northland	818,900	48%
Auckland	284,100	4%
Waikato	370,600	29%
Coromandel	458,100	59%
Bay of Plenty	677,000	48%
Rotorua	328,100	20%
Lake Taupo	407,800	27%
Tairāwhiti	285,000	57%
Hawke's Bay	281,400	32%
Taranaki	272,100	32%
Wairarapa	93,200	33%
Wellington	185,600	7%
Marlborough	223,500	31%
Nelson Tasman	655,500	47%
West Coast	514,300	40%
Kaikoura	204,100	42%
Hurunui	152,600	40%
Canterbury	621,000	17%
Timaru	190,700	51%
Mackenzie	268,500	38%
Waitaki	157,000	36%
Central Otago	130,100	39%
Lake Wanaka	368,300	43%
Queenstown	367,900	11%
Clutha	94,700	68%
Southland	133,000	22%
Fiordland	285,200	44%

* of commercial guest nights in region

