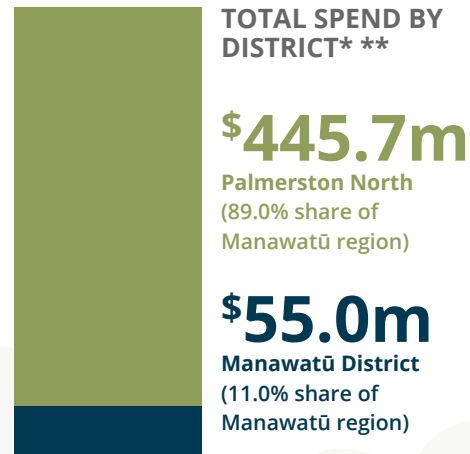
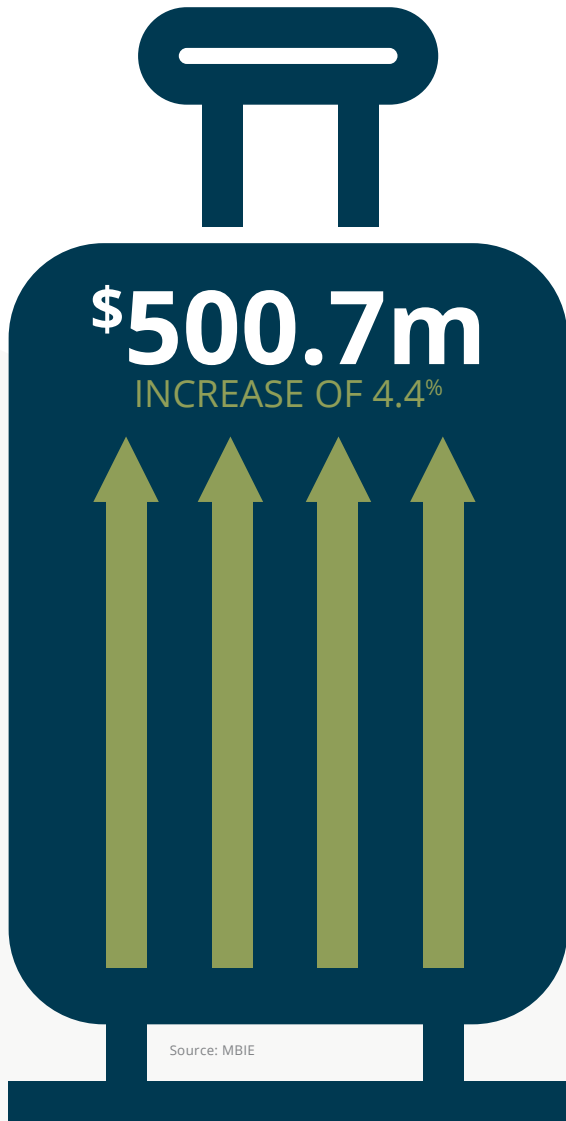


Visitor Spend

Manawatū Region Year End February 2020

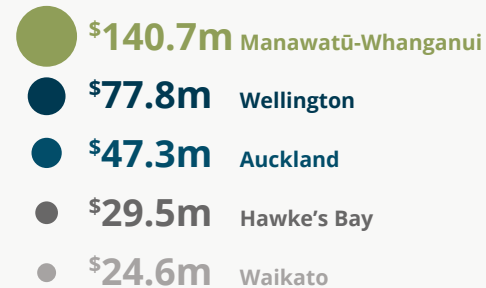


For Year End March 2020, CEDA RTO* ranked 14th in overall domestic and international spending out of 32 RTO regions.

*CEDA RTO figures from MBIE are specific to the Manawatū District and Palmerston North city combined region.

VISITOR SPEND BY ORIGIN

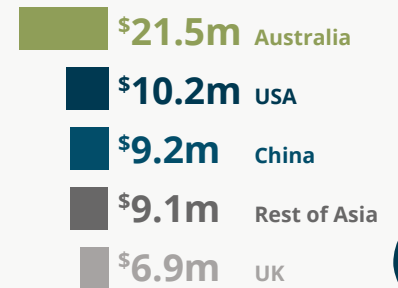
Top 5 Domestic Markets by Spend



TOP 5 CATEGORIES OF SPEND (MARKET SHARE)



Top 5 International Markets by Spend



*This spend encompasses visitor spending on the following sectors: accommodation, apparel, bars/cafe/restaurants, food retailing, fuel, hardware/homeware, other retail, majors, **and takeaways.

**Please note that 'Majors' and 'Other Retail' include a further range of retailing, such as pharmaceuticals, antiques, travel agency services, laundromats, tyres, newspaper and stationary retailing and others.

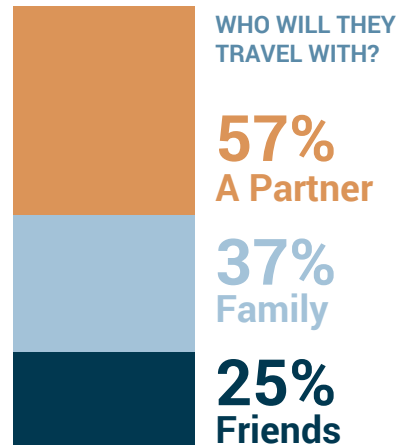
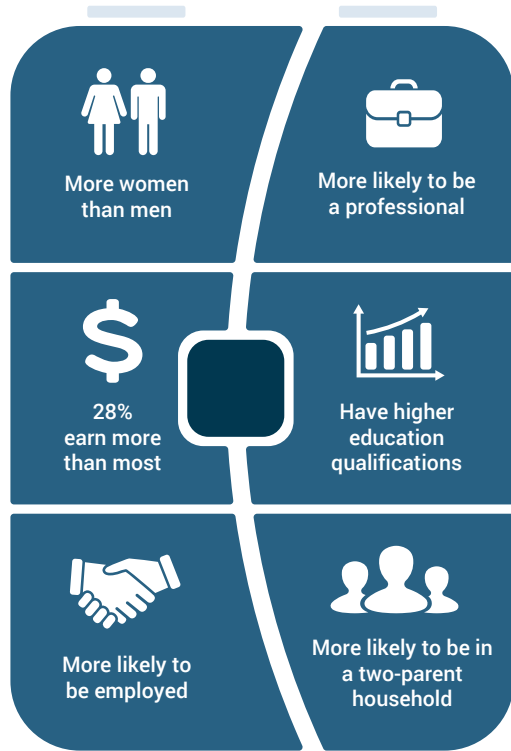
RTO data is only kept on the MBIE website for one month so February data is no longer available.

The Kiwi Travel Bug is alive and kicking

34% of Respondents
(Equivalent of 1.3M people across New Zealand)

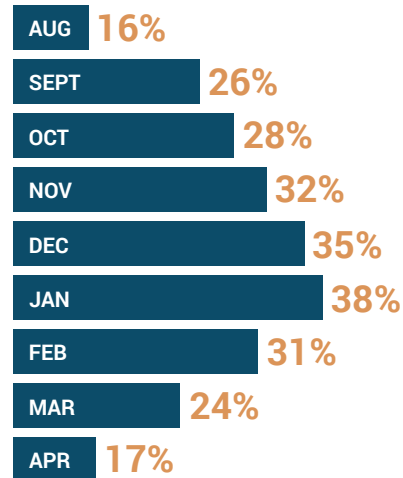
Indicated that they would take a domestic holiday in the 7-12 months after lockdown restrictions are lifted*

Of those intending to take a domestic holiday

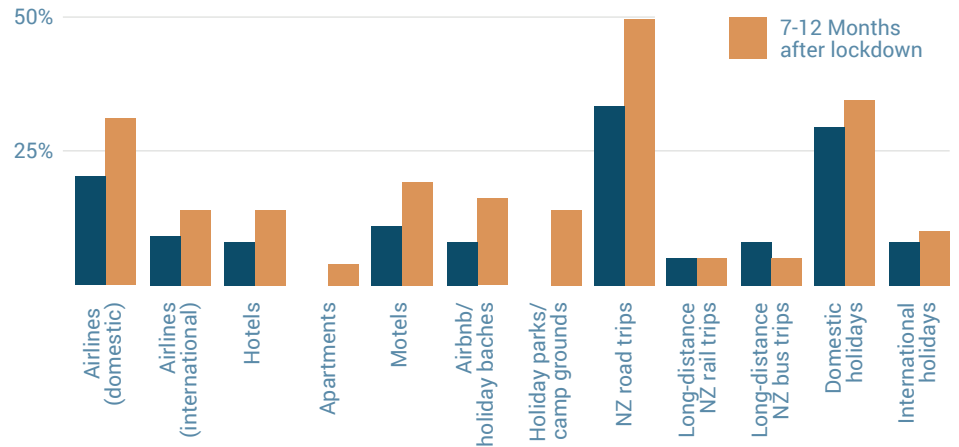


The Great Kiwi Summer is about to begin

PREFERRED MONTHS TO TRAVEL

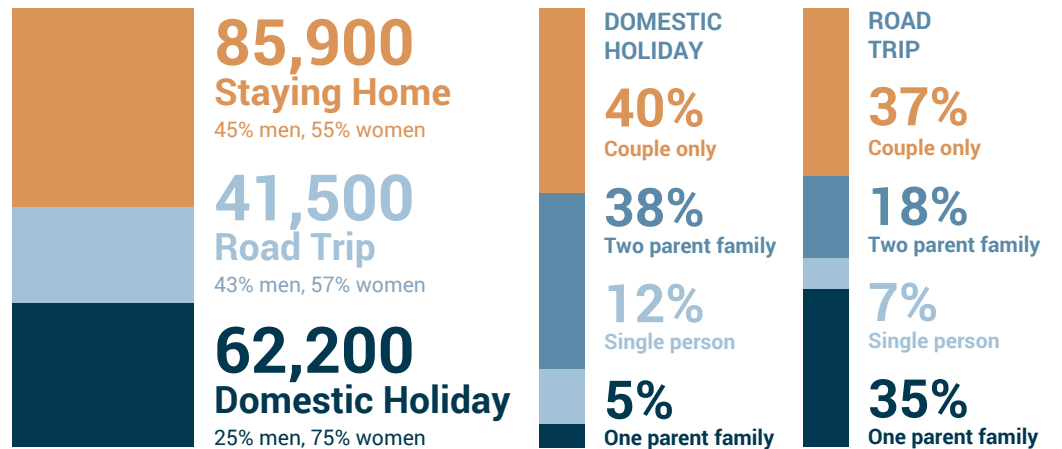


Travel Plans



FUN FACT: 75% WANT TO BOOK ONLINE BEFORE THEY GO!

Locals (within a 1hr drive) are looking for breaks as well**



* Expectation is more people will travel domestically while international travel remains limited.

Sources:

**Horizons Research – April 2020: Taranaki/ Wanganui/ Manawatu/ Palmerston North – 189,600 adults.

All other information is from Horizons Research – April 2020: NZ-wide survey - 1,229,600 adults.

Who's coming?

Four key groups of travellers interested in visiting us*

21% Family Fun Visiting family

- Mostly 65+ age group
- Motel (51%), hotel (24%)
- Shopping, wildlife park, walking, garden visits/flower shows
- 3 overnight trips, 5 day trips p.a.

16% Fun with Kids Family bonding & activities

- 35-55 age group
- Motel (59%), rest equally spread over hotel, camp ground, serviced apartment
- Wildlife park, theme park, walking, trails, swimming, surfing, gondola, cable car
- 5.9 overnight trips, 10.7 day trips p.a.

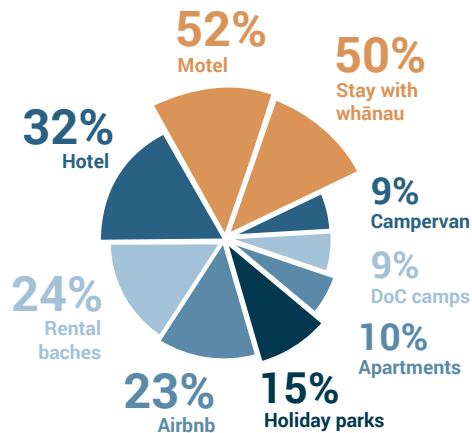
14% Exploring Nature Exploring outdoors & discovering new places

- 25-65+ age group
- Motel (62%), hotel (36%), DoC huts, camping ground/tent/van
- Wildlife, walking, trekking, national park, photography, trails, natural attractions
- 5.5 overnight trips, 9.4 day trips p.a.

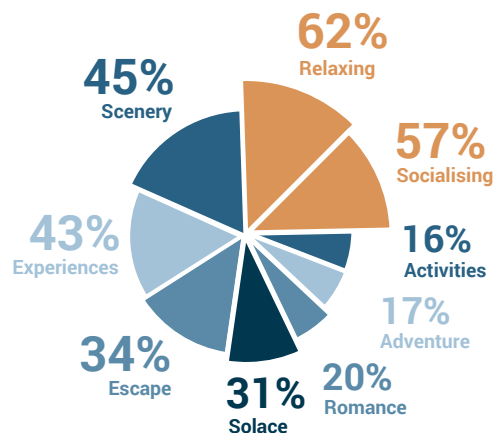
4% Adventure/Challenge Interacting with nature & urban nature

- 18-44 age group
- Motel (51%), rest camping/freedom camping
- Swimming, surfing, wildlife park, theme park, leisure park, horse treks, health spa, mountain biling, trails, rafting, kayaking
- 8 overnight trips, 10.8 day trips p.a.

Where locals plan to stay

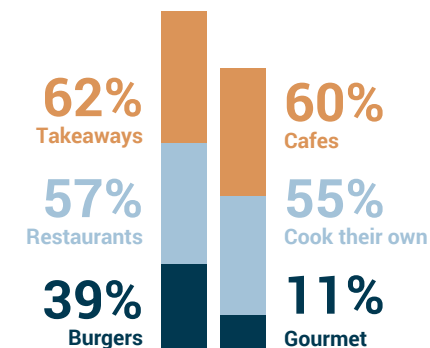


The experience locals want

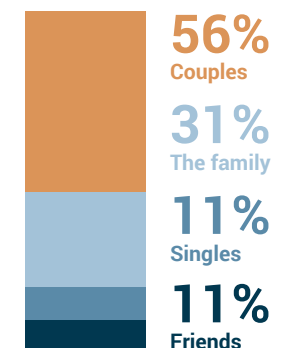


FUN FACT: 93,000 MOUNTAIN BIKERS LIVE WITHIN A 3-HOUR DRIVE OF MANAWATŪ

What locals want to eat



Who will they bring?



Sources:

*DGIT.nz (NZ-wide Domestic Growth Insight Tool) 2016.

All other information is from Horizons Research – April 2020: Taranaki/ Wanganui/ Manawatu/ Palmerston North – 189,600 adults.