

September '23 Destination Insights Report

Prepared for Development West Coast

About & Definitions

Go to Report



This report is prepared on a monthly basis, using industry standard data sets to provide key stakeholders in the tourism ecosystem with an overview of the major trends and dynamics in the region.

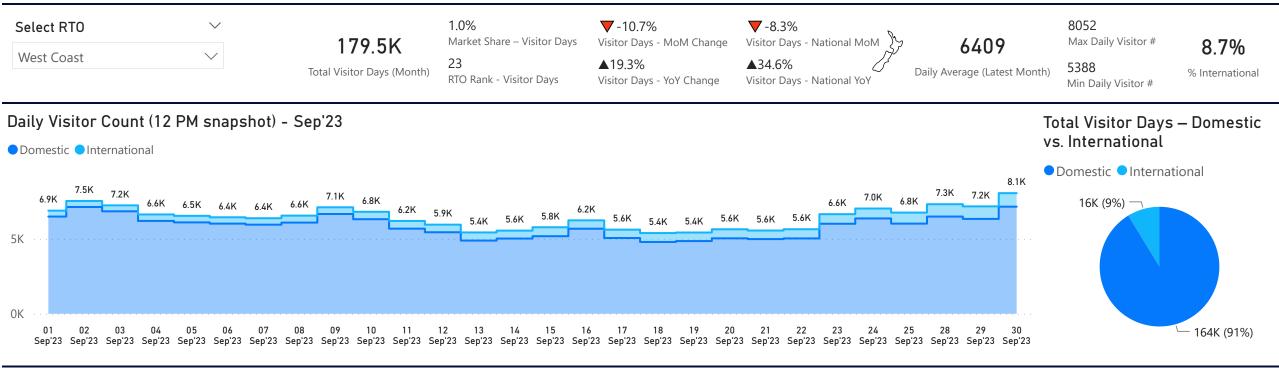
Data sets:

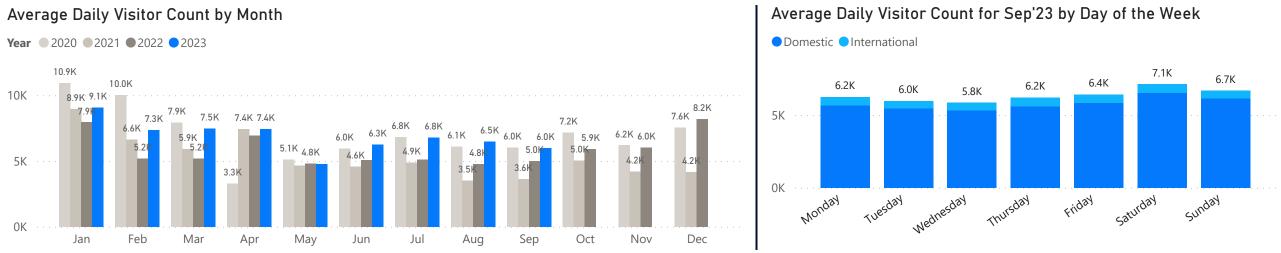
- Visitor and Local Population Estimates: Daily visitation data provided by 100% Pure New Zealand and generated by Data Ventures. The data is based on daily cellular mobile device counts at 12 pm.
- Monthly Unique Visitor Estimates (MURPEs): Monthly unique visitor count data provided by MBIE. Unique visitor in this context means that a visitor staying for several days in the region will only be counted once. The difference between monthly unique visitor counts and the monthly sum of daily visitor counts is thus a great indicator of visitor time spent in the region.
- Tourism Electronic Card Transactions (TECT): Monthly spend data provided by MBIE. The data only captures credit/debit card spend made in the region (at a physical machine) and thus excludes cash and online spend. The data should be considered indicative of trends rather than representative of actual spend numbers. Domestic and international card spend thus cannot be summed. More information can be found on the MBIE website <u>here</u>.
- Accommodation Data Programme (ADP): Monthly commercial accommodation performance data provided by MBIE. The data is based on survey data submitted by participating accommodation operators. As participation is voluntary the coverage does vary for different regions / accommodation types. Additionally, due to confidentiality concerns some numbers may not be published. More information can be found on the MBIE website <u>here</u>.
- Business Events Data (BED): Quarterly business events data. The data is based on survey data submitted by participating business events venues. More information can be found at the BED Programme website here.
- Border Crossing Data: Weekly provisional, otherwise monthly border crossing data, collected by Immigration New Zealand and published by StatsNZ. The data tracks daily border crossings by port of arrival, visa type and travel intent. More information can be found here.

Definitions:

- Month on Month (MoM): Comparison of data or performance from one month to the previous month to assess short-term trends and changes. E.g. if the visitor spend in January was \$100 and in February is \$125, the MoM change is +25%. Note that seasonality can heavily affect short-term trends.
- Year on Year (YoY): Comparison of data or performance from one month to the same month of previous years to assess long-term trends and changes that are not affected by seasonality. E.g. YoY change in the April guest nights figure compares April this year to April last year.
- Year Ending (YE): Rolling sum of the previous 12 months. E.g. the event count for YE June 2023 is the sum of all events held between July 2022 and June 2023.
- Visitor Day: Measure that sums daily visitor counts. E.g. 1 visitor present in the destination (at 12 pm see Data Ventures above) for 4 days equates to 1 x 4 = 4 visitor days. 3 visitors present in the destination for 2 days equate to 3 x 2 = 6 visitor days.
- Market Share: Percentage of market share for a given RTO in relation to the national total. E.g. an RTO with 10k visitors has 10 % market share, if the national visitor count was 100k.
- Visitor Spend: Defined as the total amount spent by visitors using credit/debit cards in the region (see TECT above).
- ANZIC Product Category: Product types based on the 'Australia and New Zealand Industrial Classification'. All businesses are assigned to the ANZIC category that best describes their primary business activity.
- Commercial Accommodation Guest Arrivals (GA): The number of guests that stayed in surveyed accommodation units (participating in the survey see ADP above). E.g. 2 guests staying 3 nights equate to 2 guest arrivals.
- Commercial Accommodation Guest Nights (GN): The number of guest nights stayed in accommodation units (participating in the survey see ADP above). E.g. 2 guests staying 3 nights equate to 6 guest nights.
- Commercial Accommodation Occupancy / Occupancy Rate (OR): Stay unit nights occupied divided by available monthly stay unit capacity.
- Stay Units: Daily capacity of short-term accommodation units including those temporarily closed e.g. hotel rooms, motel units, dorm beds, camping sites, etc.
- Available monthly stay unit capacity: Number of stay unit nights available. This excludes stay units temporarily removed from the inventory due to closures, maintenance, emergency housing etc.

'Data Ventures' Visitation Data - West Coast - Sep'23

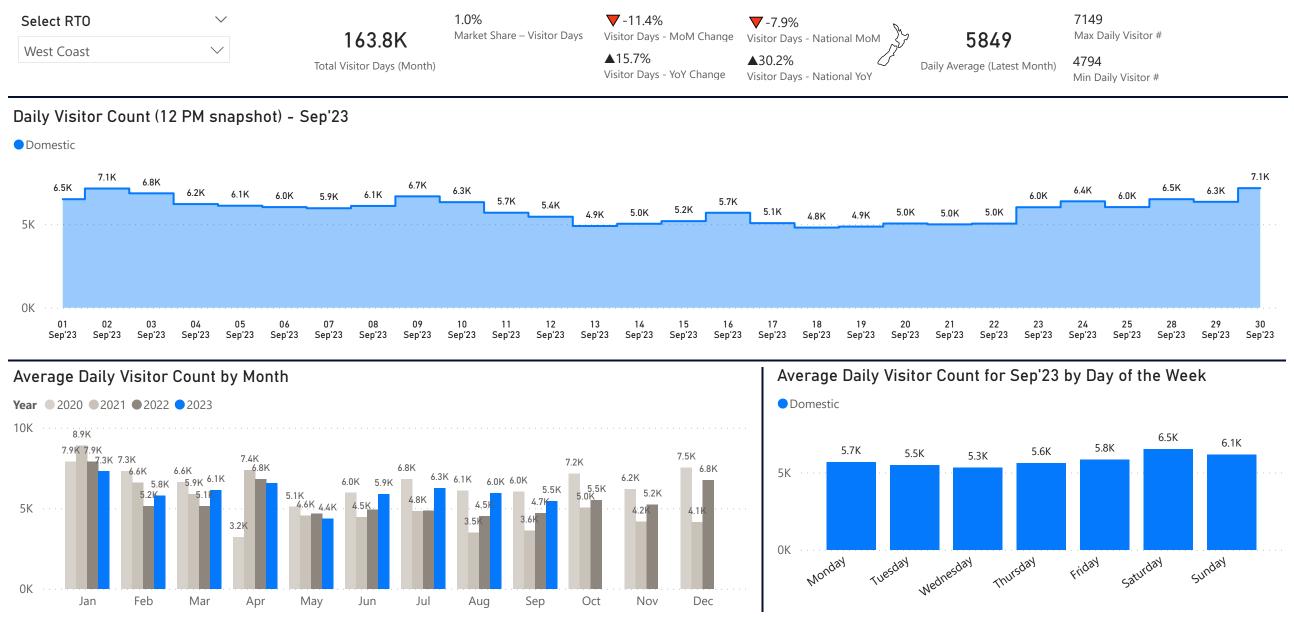




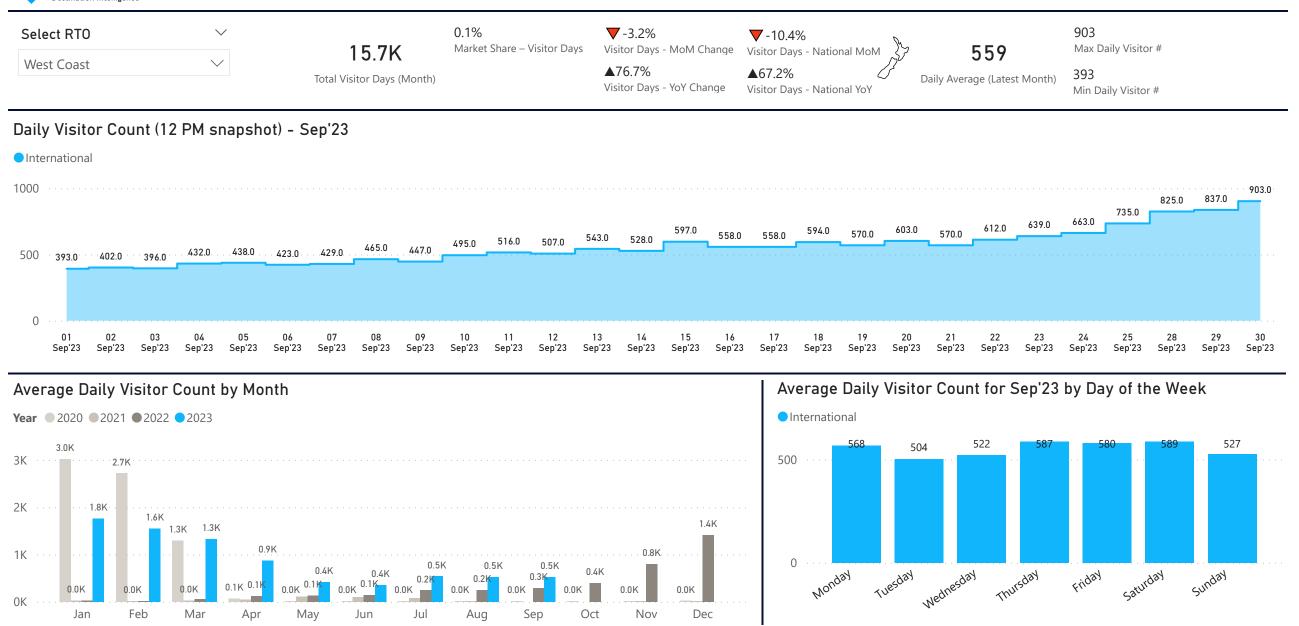


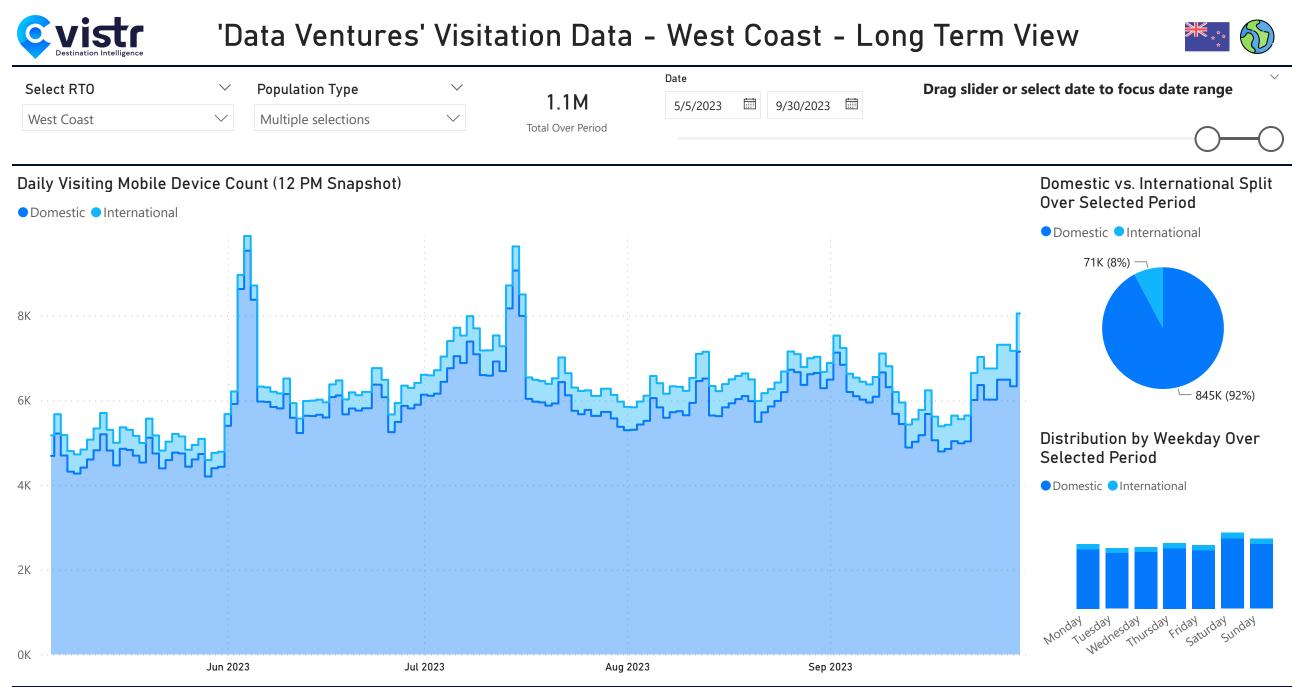
Domestic Visitation Data - West Coast - Sep'23

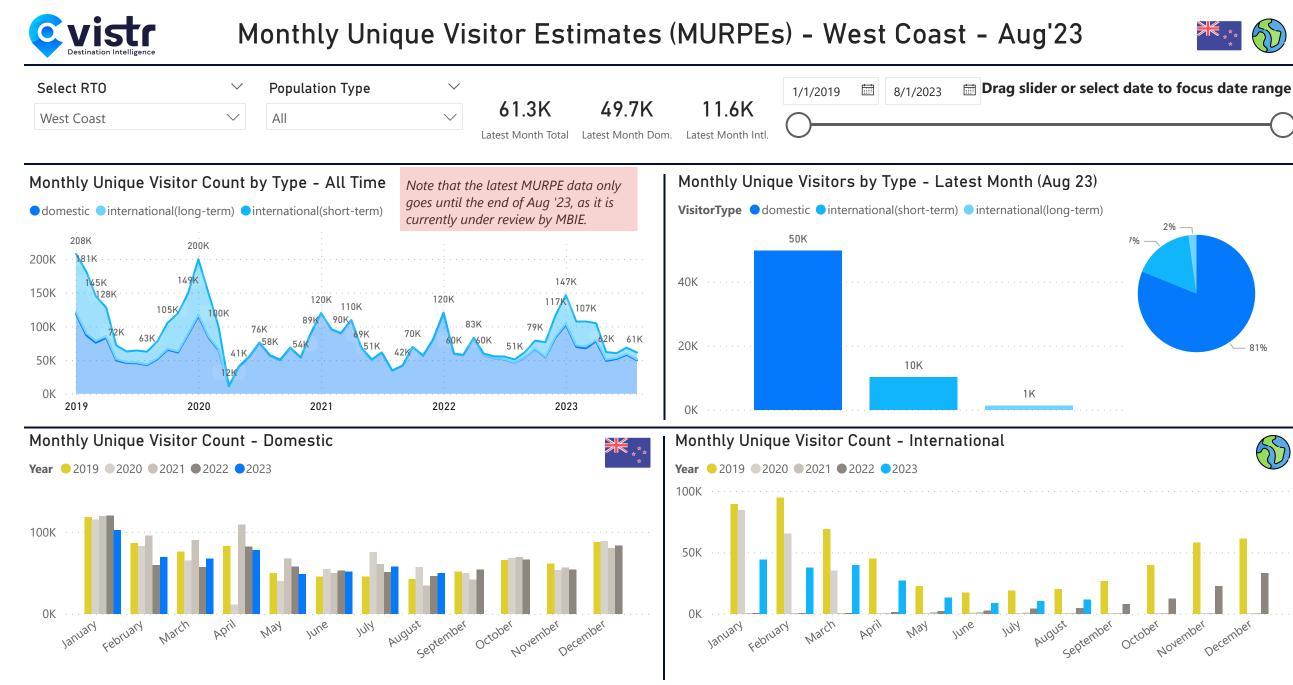








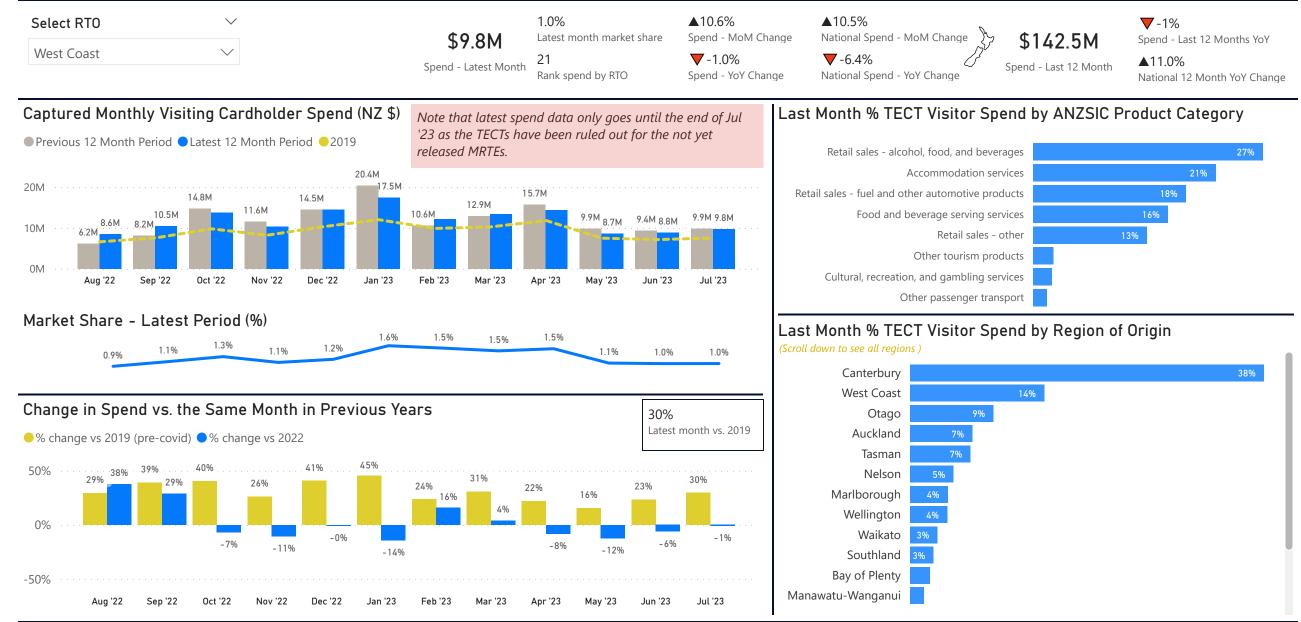




MoM (Month on Month): Change in reported month to previous month. | **YoY** (Year on Year): Change in reported month to same month last year. | **Monthly Unique Visitor Count:** Number of unique individual visitors (cellular device counts) in a destination at 12 pm on any date. Unique visitor in this context means that a visitor staying for several days in the region will only be counted once.

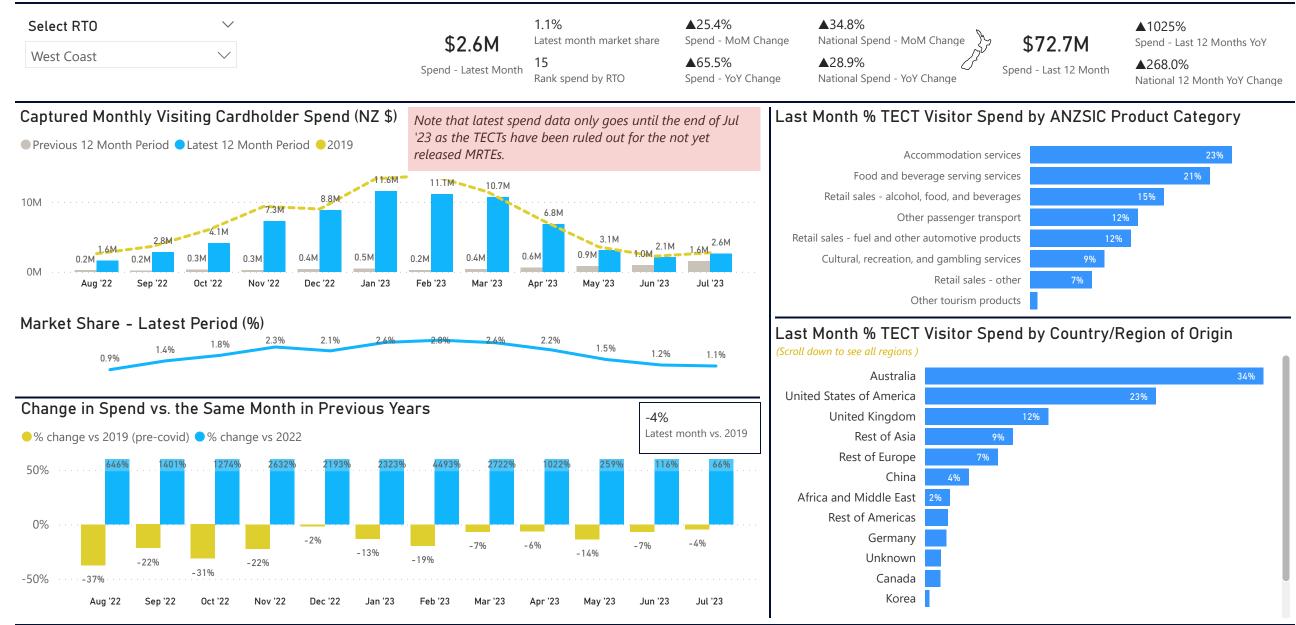


TECT Domestic Visitor Spend - West Coast - Jul'23





TECT International Visitor Spend - West Coast - Jul'23

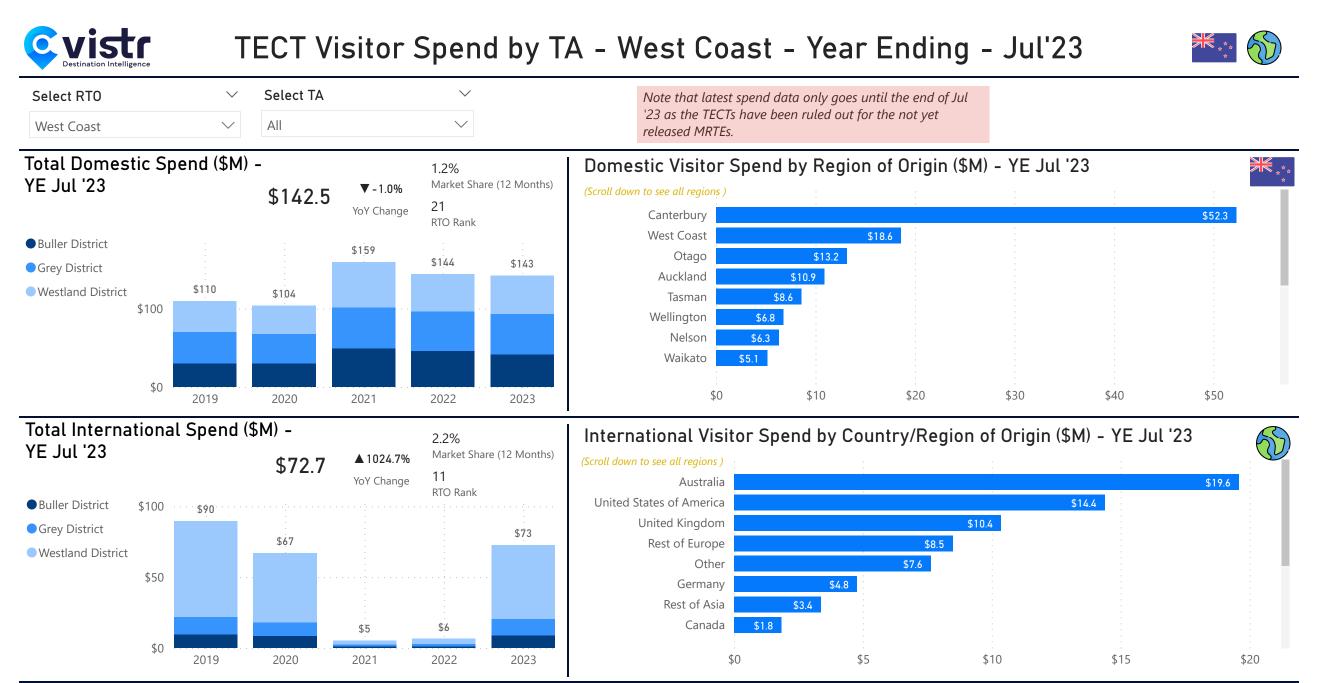






 \sim Select RTO Note that latest spend data only goes until the end of Jul '23 as the TECTs have been ruled out for the not yet West Coast released MRTEs. Total Domestic Spend (\$M) -Domestic Visitor Spend by Region of Origin (\$M) - YE Jul '23 1.2% **▼** - 1.0% YE Jul '23 Market Share (12 Months) (Scroll down to see all regions) \$142.5 YoY Change 21 Canterbury \$52.3 **RTO Rank 12 Months Ending July 2019 2020 2021 2022 2023** West Coast \$13.2 Otago \$159 \$143 30.0% Auckland \$150 YE vs. 2019 Tasman \$110 Wellington \$6.8 \$100 \$104 Nelson \$6.3 Waikato \$50 \$0 \$10 \$20 \$30 \$40 \$50 \$0 Total International Spend (\$M) -International Visitor Spend by Country/Region of Origin (\$M) - YE Jul '23 2.2% ▲ 1024.7% YE Jul '23 Market Share (12 Months) \$72.7 (Scroll down to see all regions) YoY Change 11 Australia **RTO Rank 12 Months Ending July 2019 2020 2021 2022 2023** United States of America \$14.4 United Kingdom \$100 \$90 -18.9% Rest of Europe \$8.5 \$73 \$67 Other YE vs. 2019 Germany \$4.8 \$50 Rest of Asia Canada \$1.8 \$5 \$6 \$0 \$5 \$10 \$15 \$20 \$0

Note: Data represents electronic card transactions made in region (at a physical machine) and does not account for or estimate online transactions, direct transfers and cash. The data should be considered indicative of trends rather than representative of actual spend numbers. International spend also include those living and working within New Zealand using cards issued by overseas banks and thus also captures repatriating kiwis using their overseas cards as international spend. | **YoY** (Year on Year): Change in reported month to same month last year. | **YE** (Year Ending): Rolling sum of the previous 12 month.



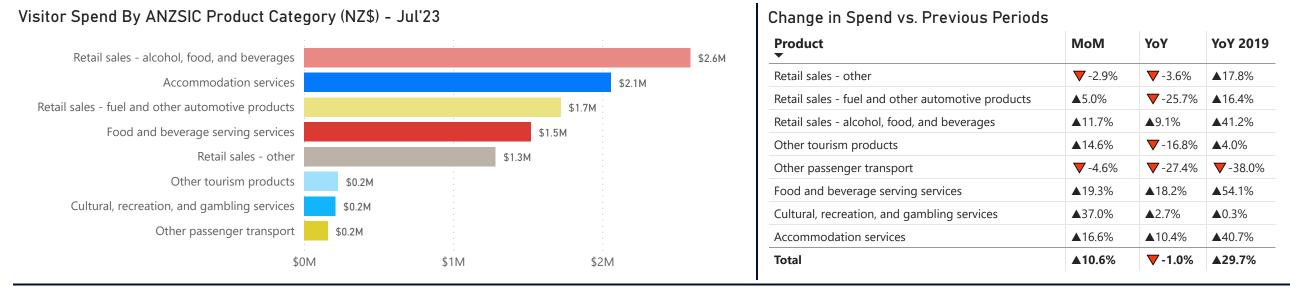
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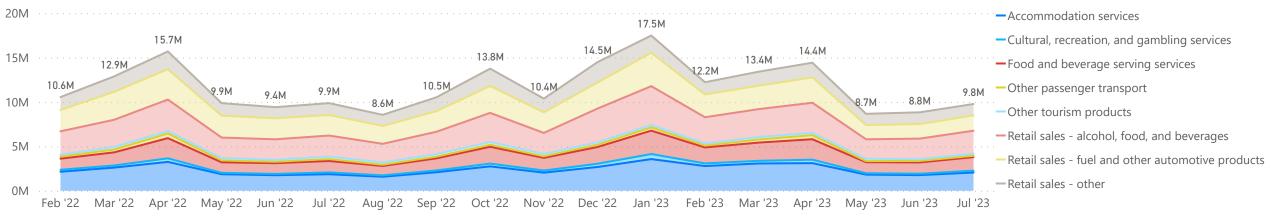


Select RTO \checkmark West Coast \checkmark

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Visitor Spend by ANZSIC Product Categoy (NZ\$)

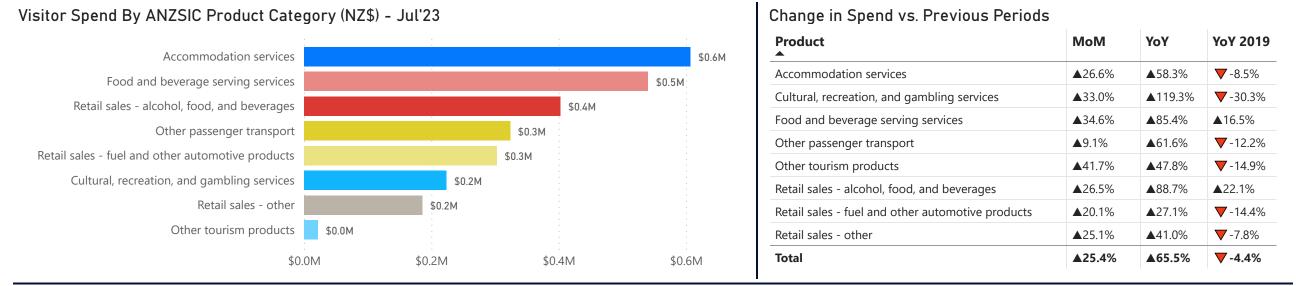


Cistr TECT International Visitor Spend By Product - West Coast - Jul'23

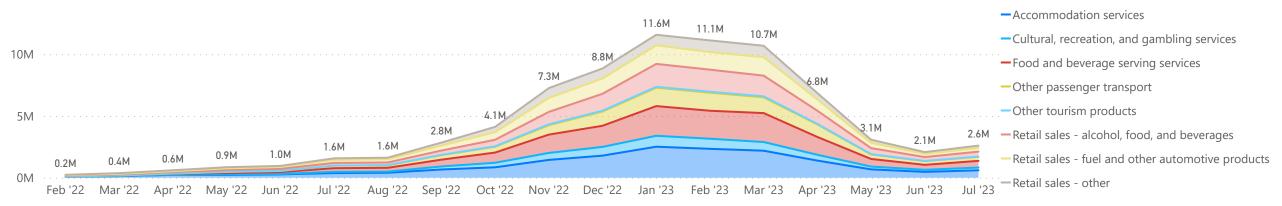


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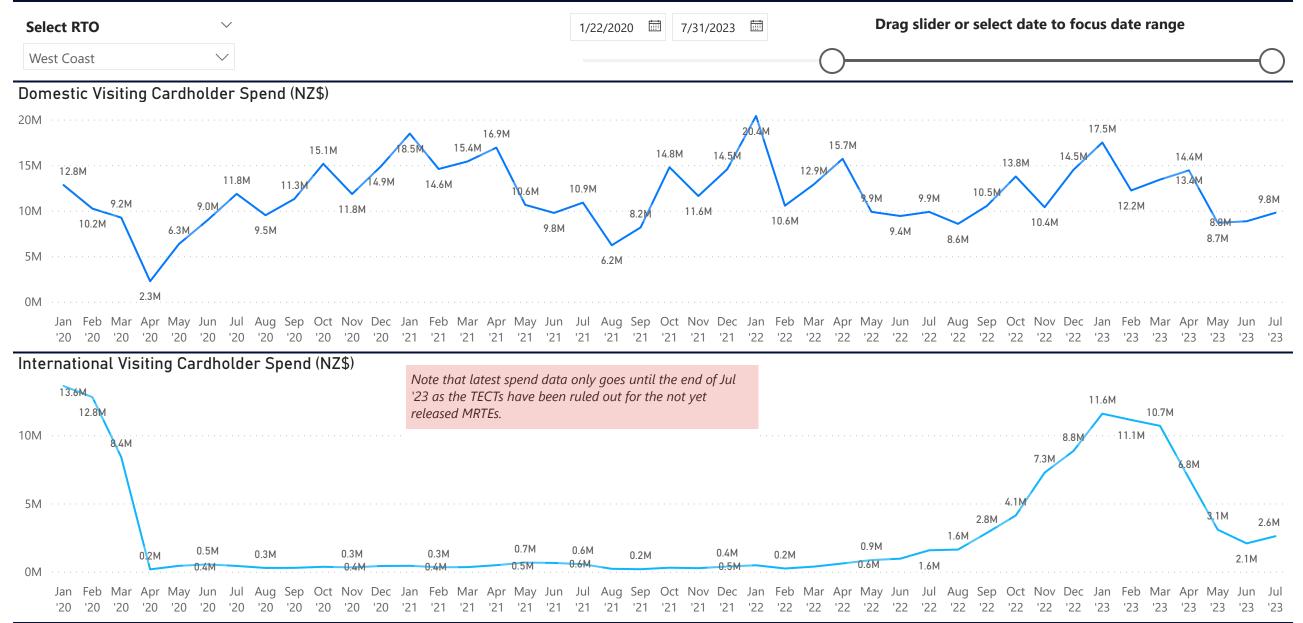


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TECT Visitor Spend - West Coast - Long Term View





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TECT Domestic Visitor Spend By Origin - West Coast - Jul'23

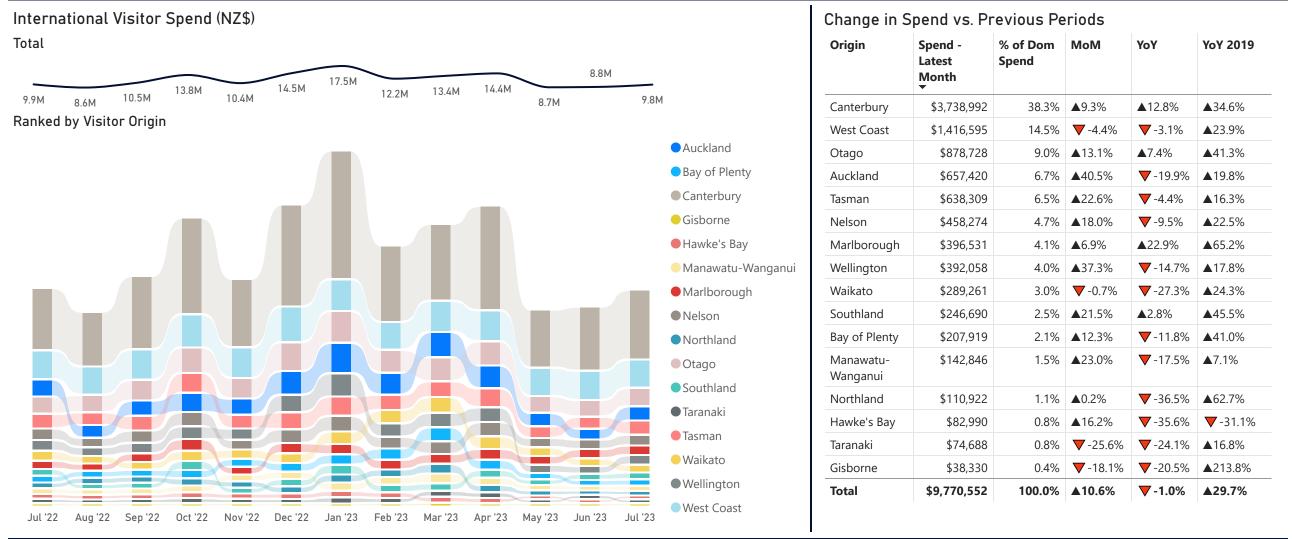


Select RTO West Coast

 \sim

 \checkmark

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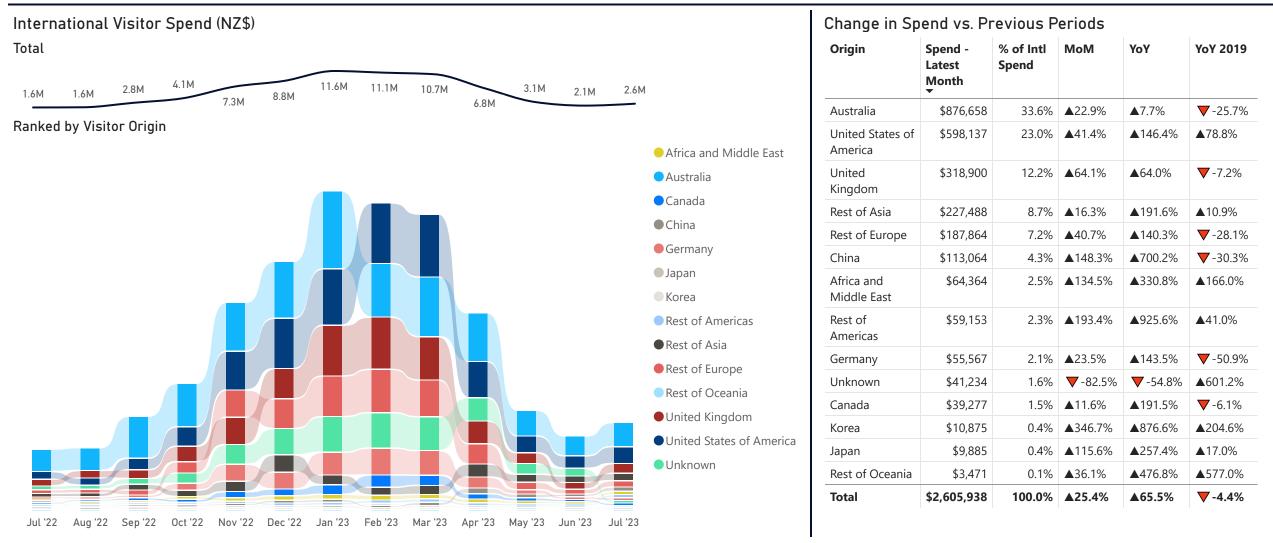
Siste TECT International Visitor Spend By Origin - West Coast - Jul'23



Select RTO West Coast \sim

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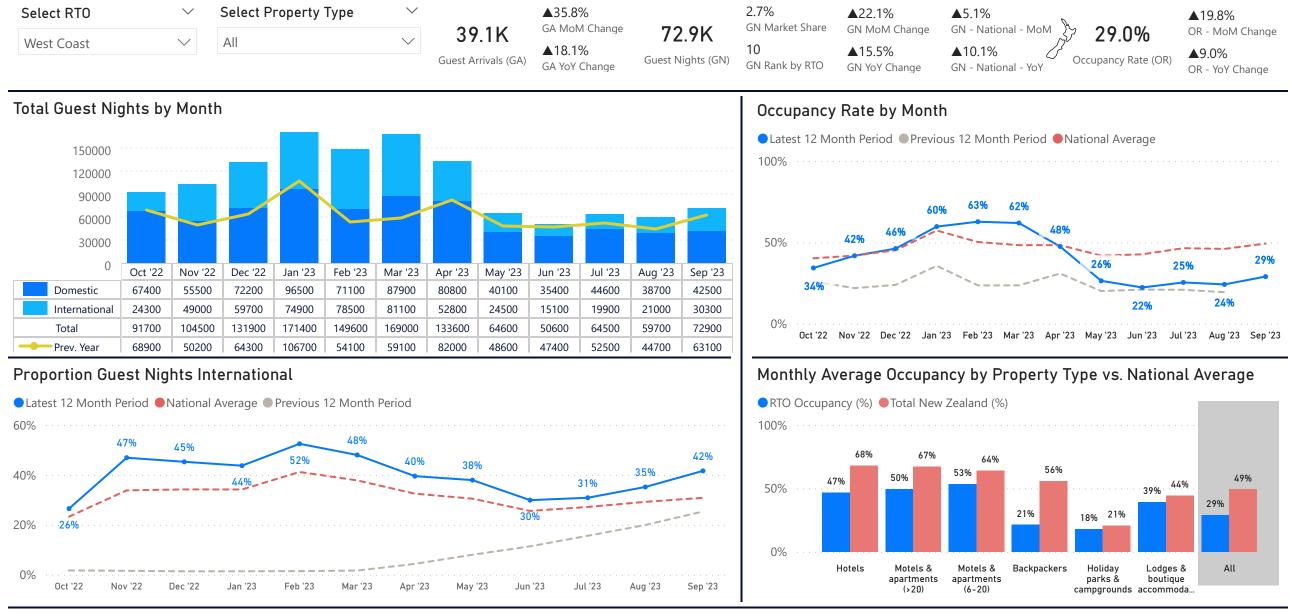
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ADP RTO Summary - West Coast - Sep'23

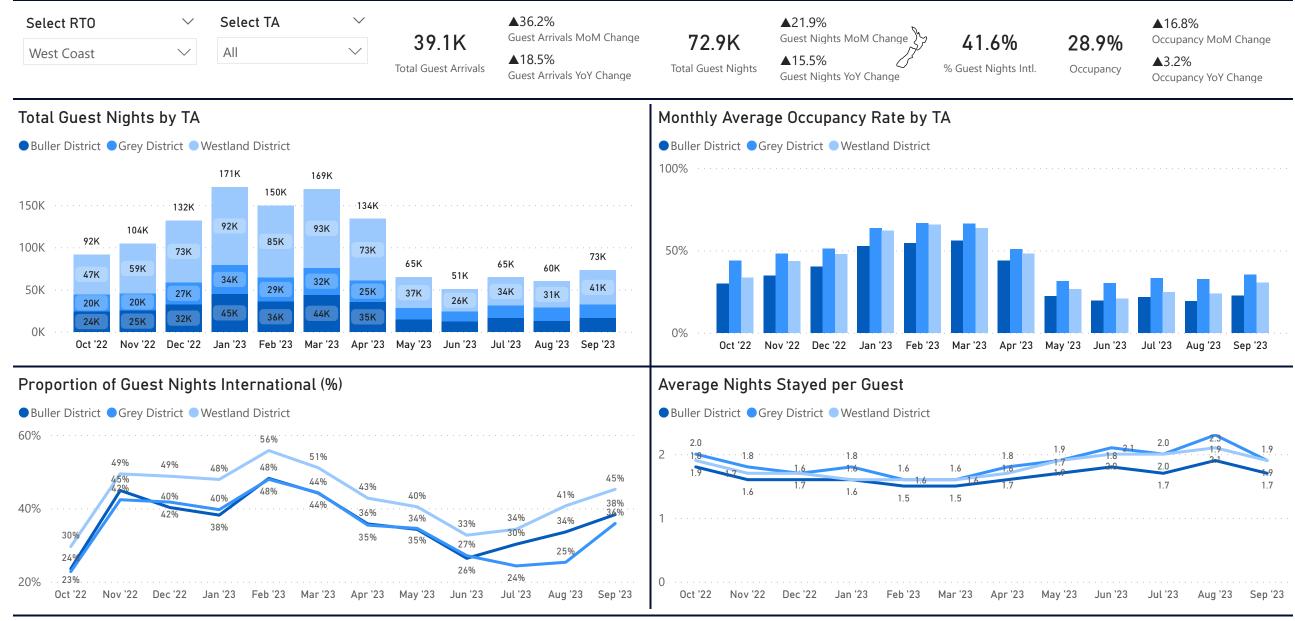




MoM (Month on Month): Change in reported month to previous month. | YoY (Year on Year): Change in reported month to same month last year. | Guest Arrivals: Number of guests stayed irrespective of stay length | Guest Nights: Number of guests multiplied by their stay length. E.g. 2 guests staying 3 nights equate to 6 guest nights. | Occupancy: Ratio of occupied stay units by available stay units.



ADP TA Summary - West Coast - Sep'23



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ADP Results - RTO Comparison - Sep'23



ADP Total Occupancy by RTO -Latest Month

Queenstown	69%	Queenstown		
Auckland	67%	Auckland		
Wellington	65%	Manawatu		
Manawatu	62%	Wellington		
Dunedin	56%	Dunedin		
Taupo	55%	Canterbury		
Canterbury	55%	Waikato		
Ruapehu	52%	Ruapehu		
Southland	51%	Mackenzie		
Rotorua	50%	Wanaka		
Waikato	50%	Hawke's Bay		
Mackenzie	50%	Таиро		
All NZ	49%	All NZ		
Hawke's Bay	48%	Southland		
Marlborough	46%	Marlborough		
Whanganui	45%	Taranaki		
Wanaka	43%	Whanganui		
Bay of Plenty	42%	Rotorua		
Taranaki	41%	Waitaki		
Hurunui	41%	Hurunui		
Fiordland	40%	Fiordland		
Waitaki	40%	Timaru		
Kaikoura	38%	Bay of Plenty		
Timaru	38%	Wairarapa		
Wairarapa	35%	Gisborne		
Nelson Tasman	31%	Nelson Tasman		

ADP Total Occupancy by RTO -**Previous Month**

67%

62%

59% 53%

53%

52%

49%

49% 49%

49%

48%

46% 46%

42%

41%

38%

37%

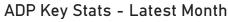
36%

36%

36%

29%

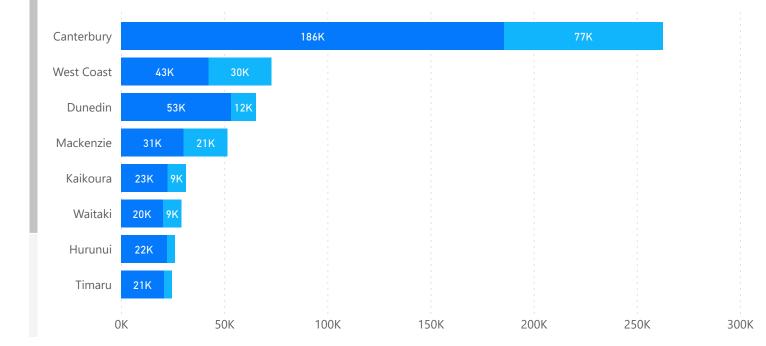
29%



Measure •	Canterbury	Dunedin	Hurunui	Kaikoura	Mackenzie	Timaru	Waitaki	West Coast
Total guest nights	262,600.00	65,300.00	26,000.00	31,400.00	51,500.00	24,600.00	29,300.00	72,900.00
Proportion of international GN	0.29	0.19	0.15	0.28	0.41	0.15	0.30	0.42
Occupancy rate	0.55	0.56	0.41	0.38	0.50	0.38	0.40	0.29
Guest arrivals	132,100.00	31,700.00	12,800.00	19,800.00	30,700.00	12,700.00	15,900.00	39,100.00
Average nights stayed per guest	2.00	2.10	2.00	1.60	1.70	1.90	1.80	1.90

ADP Guest Nights - Latest Month

Measure ODomestic guest nights International guest nights

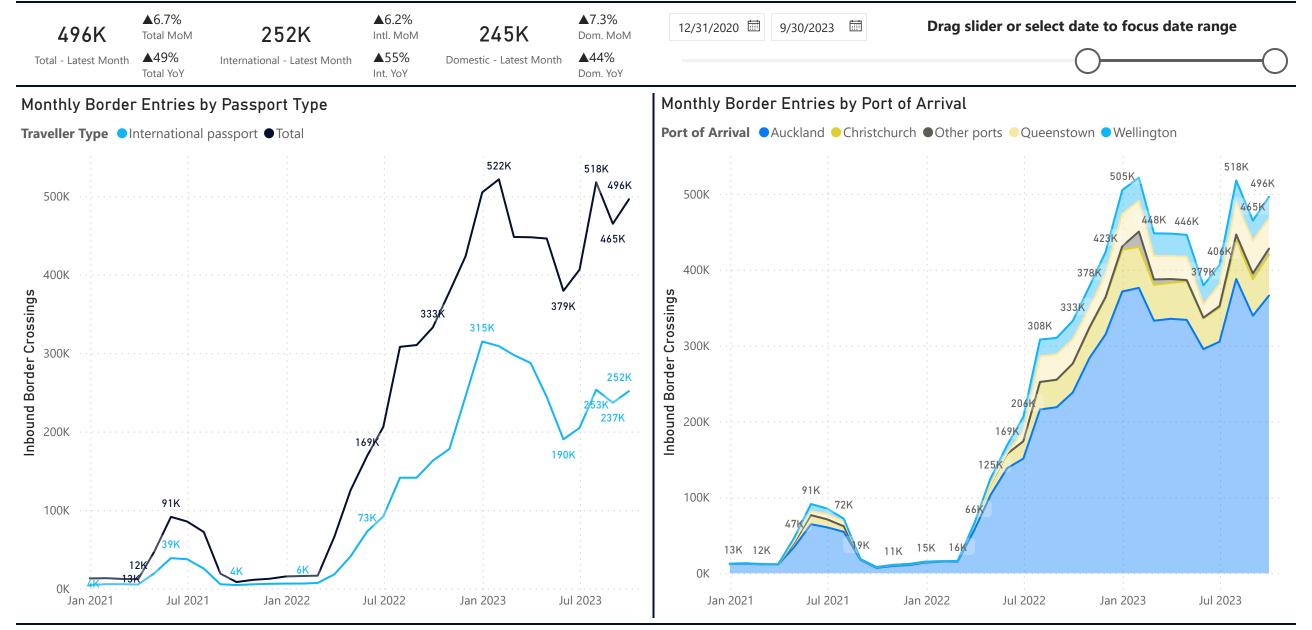


Guest Arrivals: Number of guests stayed irrespective of stay length | Guest Nights: Number of guests multiplied by their stay length. E.g. 2 guests staying 3 nights equate to 6 guest nights. | Occupancy: Ratio of occupied stay units by available stay units.

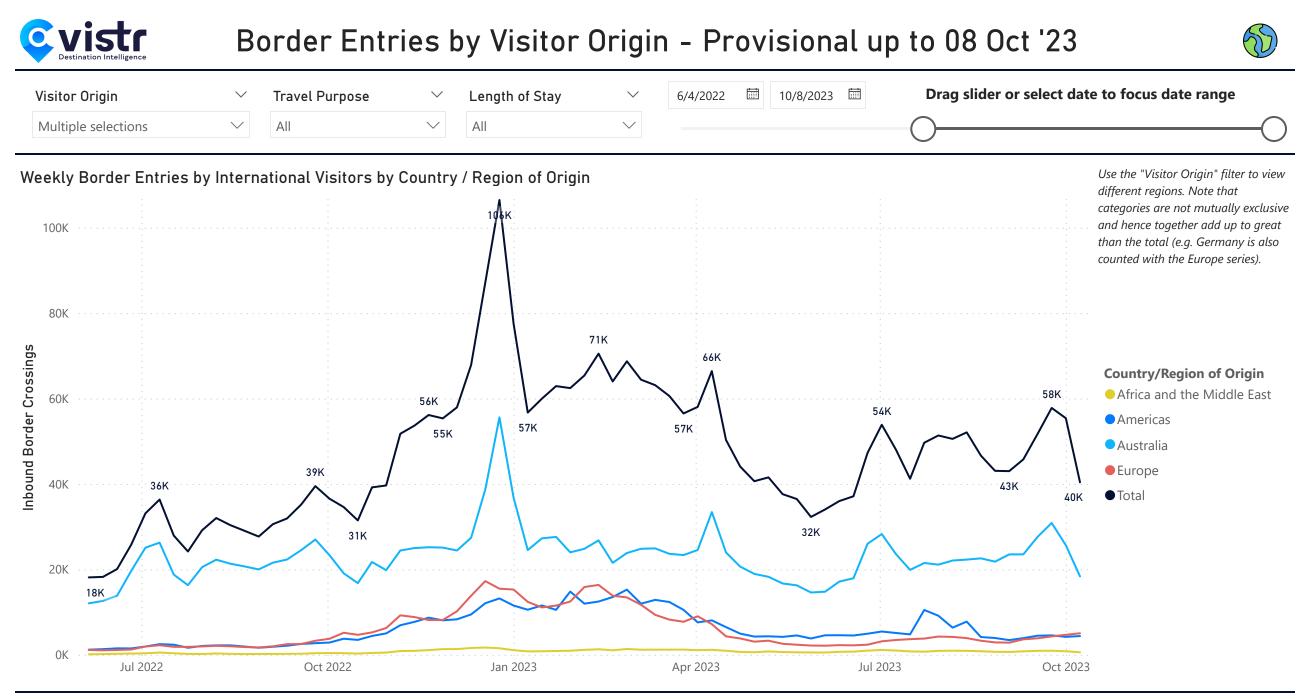


New Zealand Inbound Border Crossing Data up to 30 Sep '23

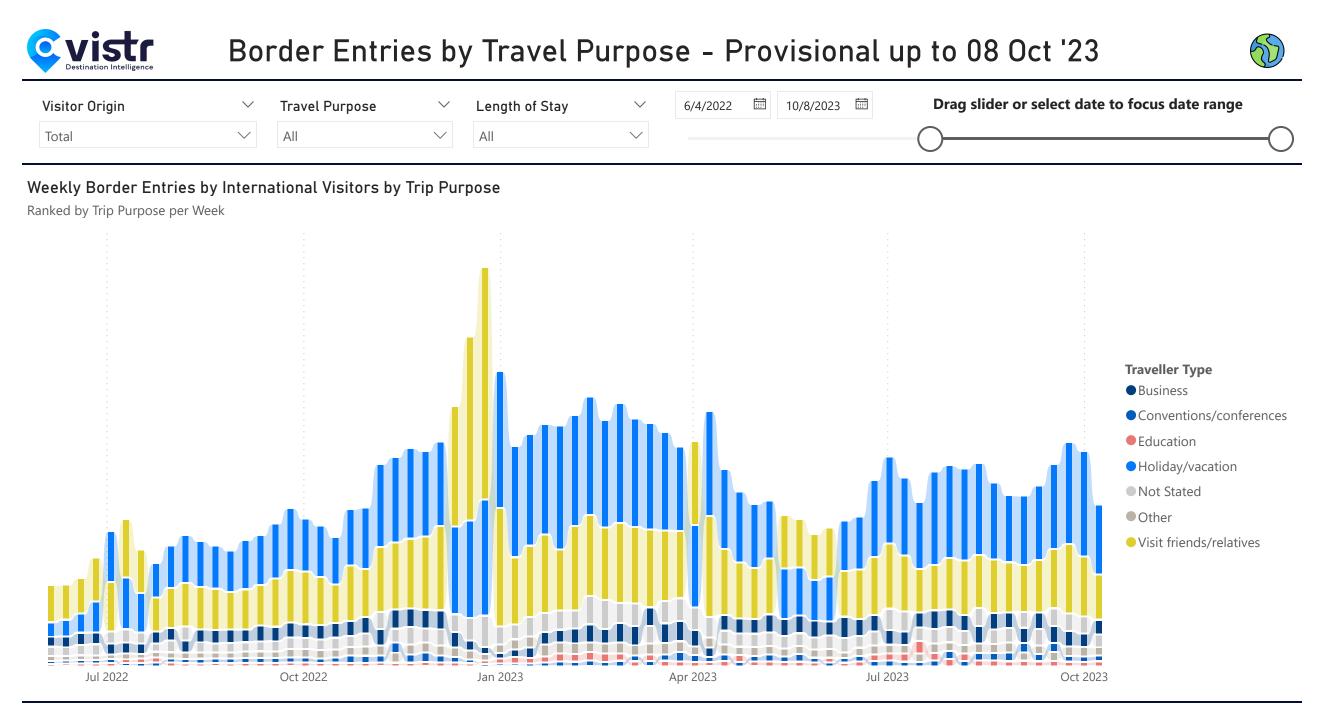




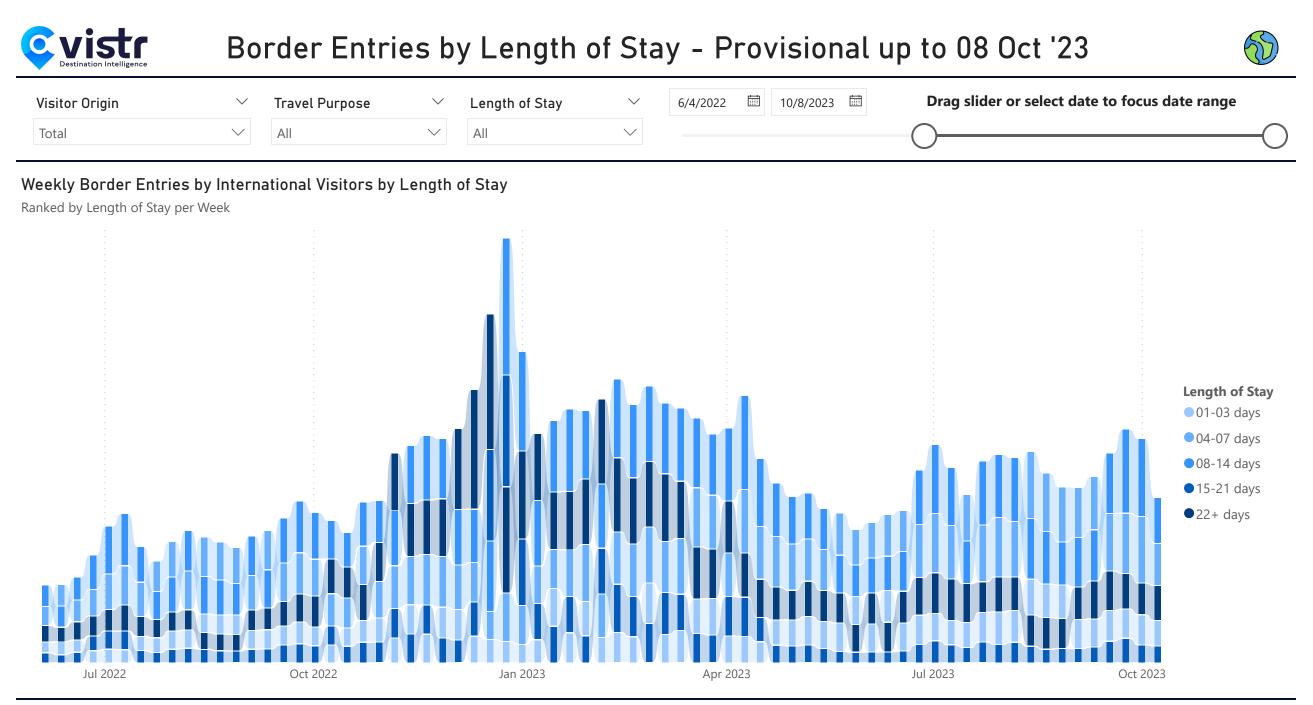
Source: StatsNZ COVID-19 data portal



Source: StatsNZ Infoshare. Figures represent total border entries for the 7 day period ending on the stated date.



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