

September '23 Destination Insights Report

Prepared for Destination Great Lake Taupo

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 Tourism 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 Additionally, due to confidentiality concerns some numbers may not be published.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>.
- Short Term Rental Data (STR): This data comes from AirDNA if provided by the RTO or the Vistr proprietary dataset based on a daily collection of short term rental stock basesd on Airbnb, Bookabach and VRBO.
- 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.



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May

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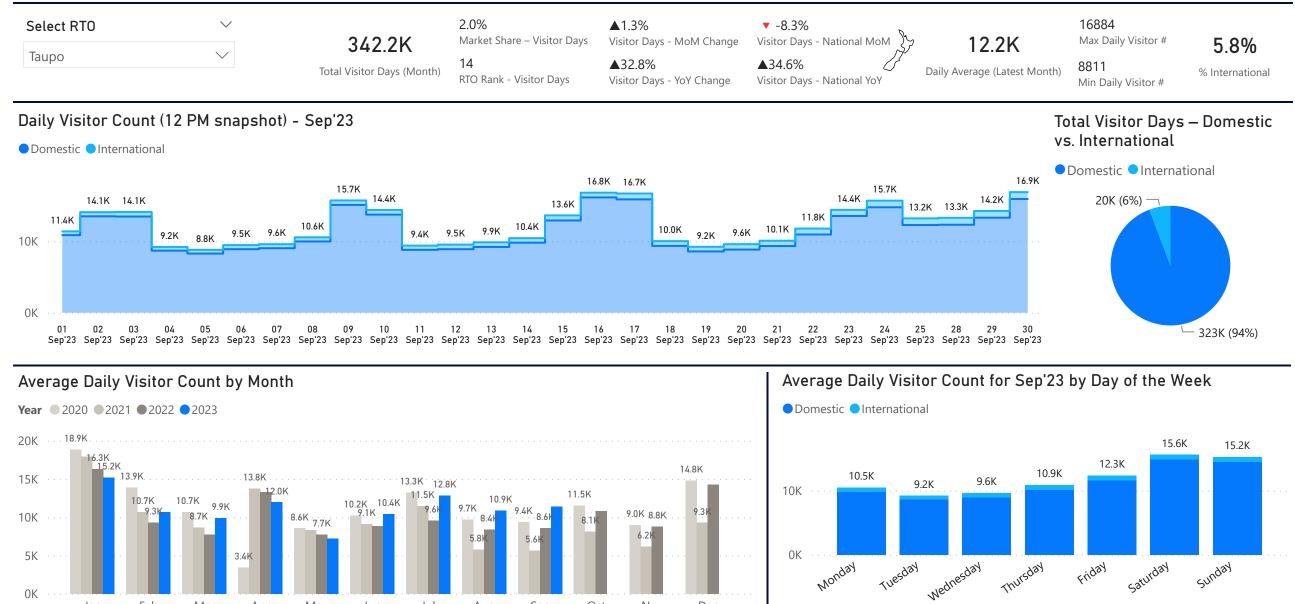
Apr

Jul

Sep

Aug

'Data Ventures' Visitation Data - Taupo - 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. | Visitor Day: Sum of daily visitor counts. E.g. 3 visitors being in a destination for 2 days each equate to 6 visitor days. | Average Daily Visitor Count: Average number of individual visitors (cellular device counts) in a destination at 12 pm on any date.

Nov

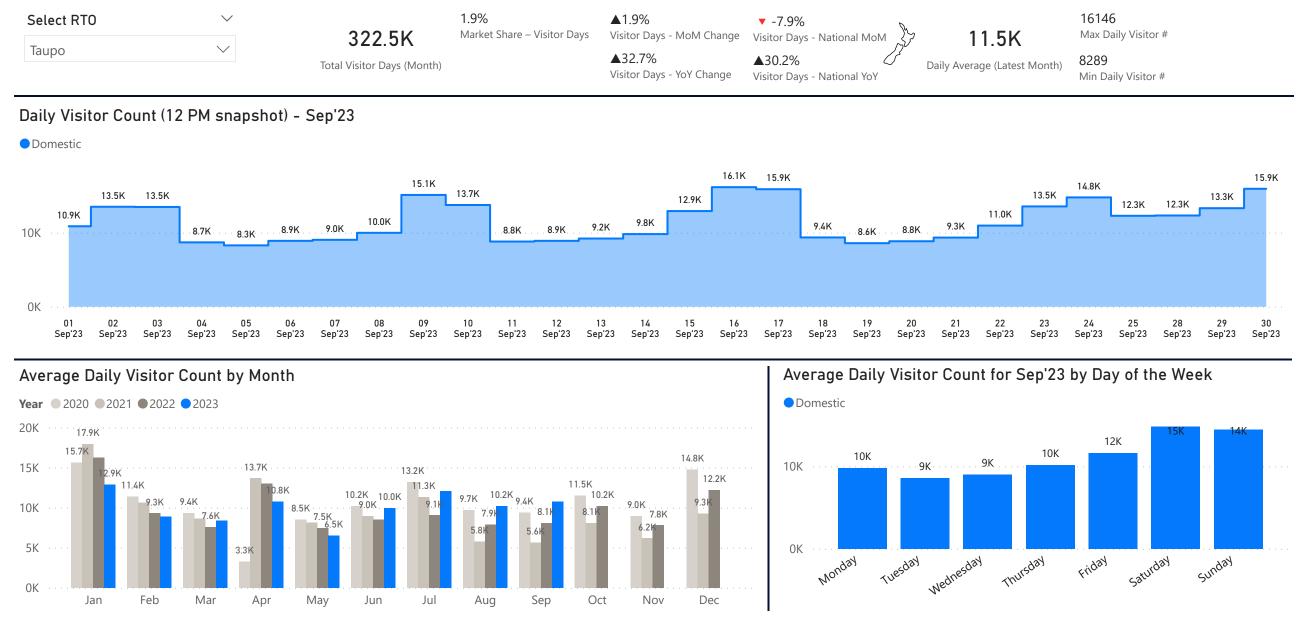
Dec

Oct



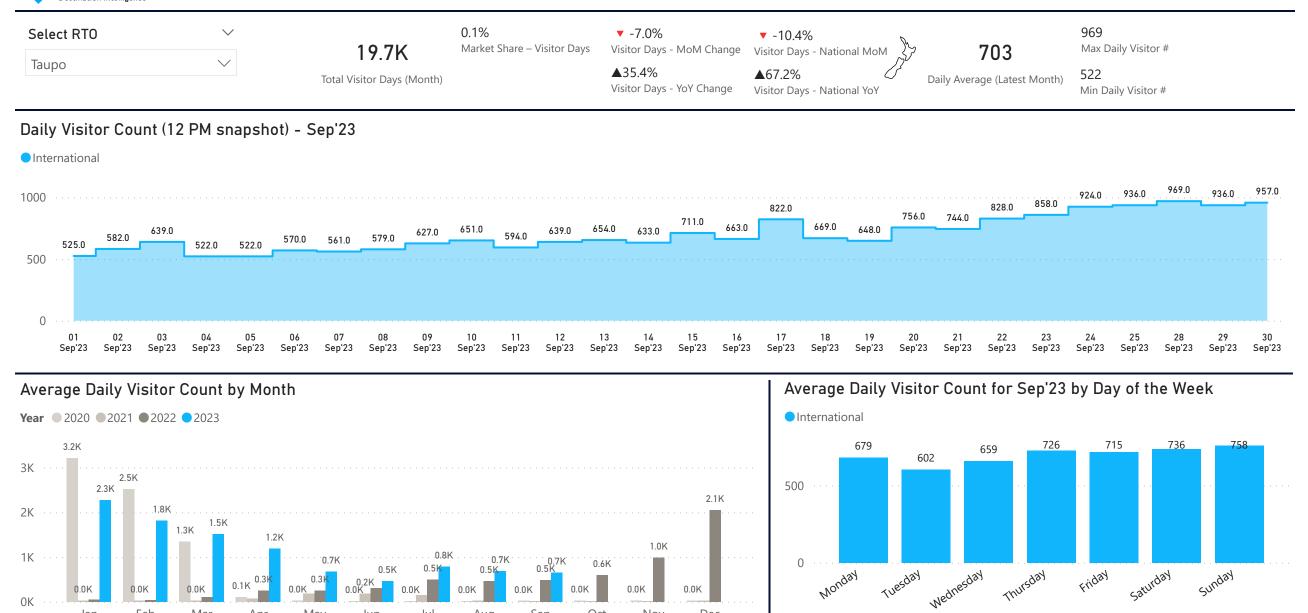
Domestic Visitation Data - Taupo - Sep'23





MoM (Month on Month): Change in reported month to previous month. | YoY (Year on Year): Change in reported month to same month last year. | Visitor Day: Sum of daily visitor counts. E.g. 3 visitors being in a destination for 2 days each equate to 6 visitor days. | Average Daily Visitor Count: Average number of individual visitors (cellular device counts) in a destination at 12 pm on any date.





MoM (Month on Month): Change in reported month to previous month. | YoY (Year on Year): Change in reported month to same month last year. | Visitor Day: Sum of daily visitor counts. E.g. 3 visitors being in a destination for 2 days each equate to 6 visitor days. | Average Daily Visitor Count: Average number of individual visitors (cellular device counts) in a destination at 12 pm on any date.

Nov

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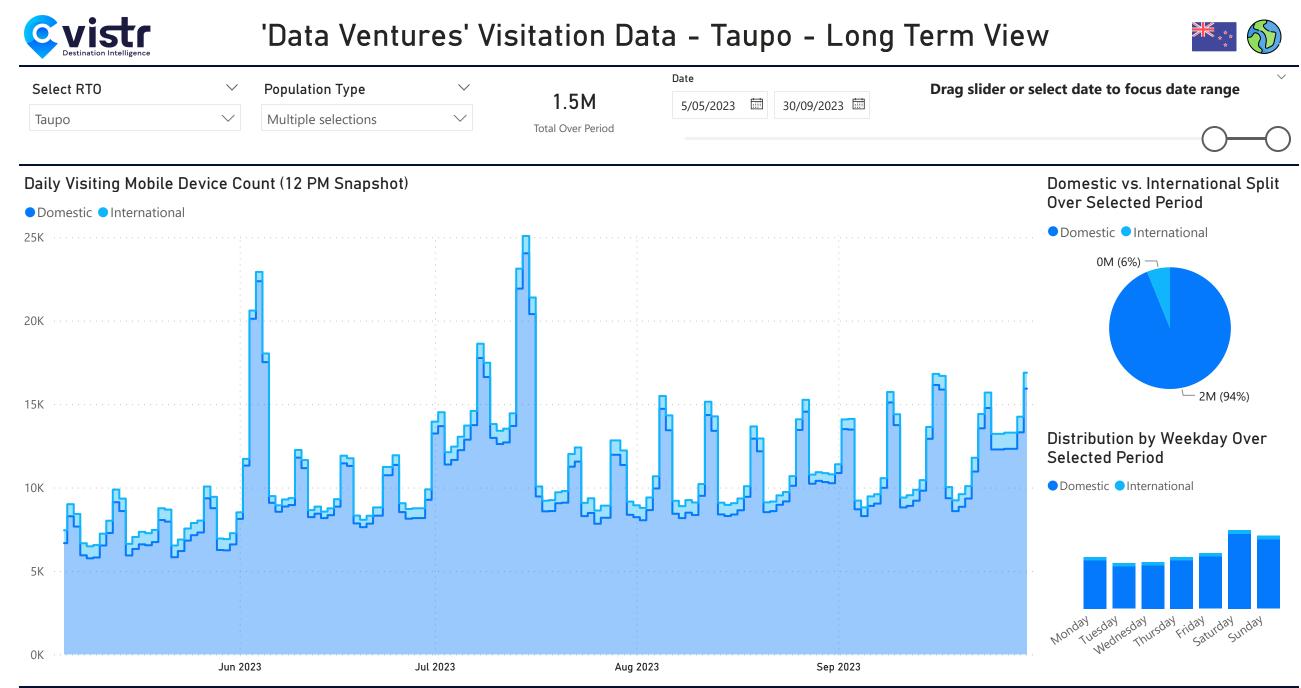
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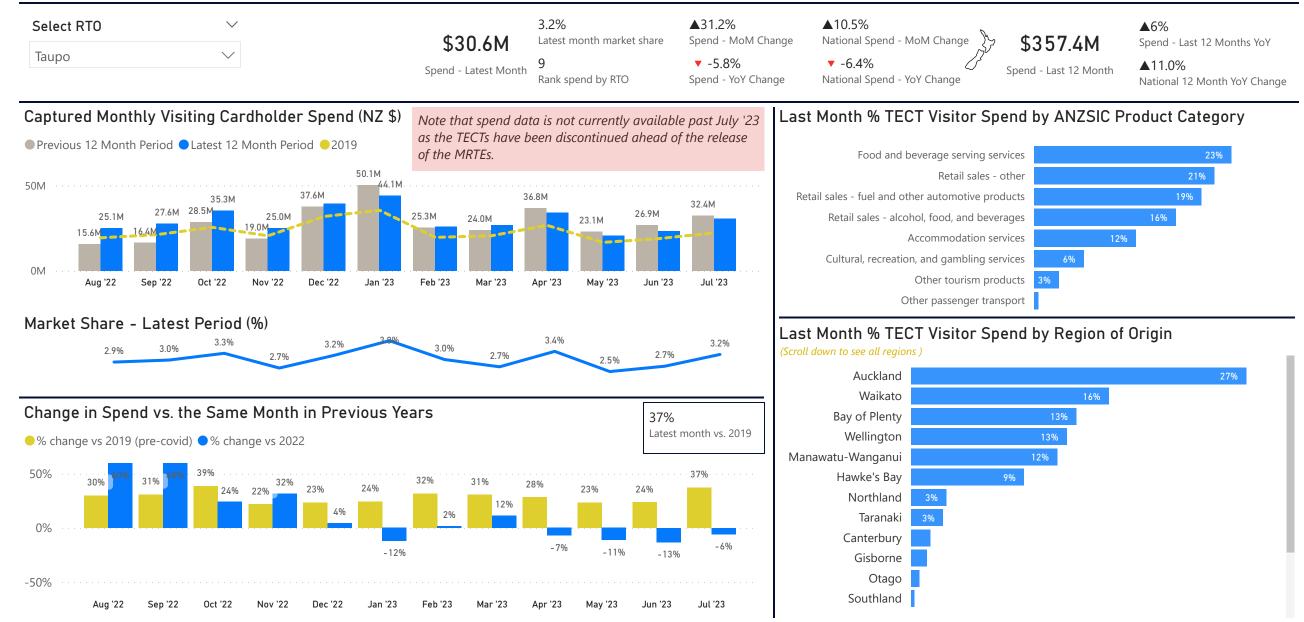




MoM (Month on Month): Change in reported month to previous month. | **YoY** (Year on Year): Change in reported month to same month last year. | **Monthly Unique Visitor Count:** Number of unique individual visitors (cellular device counts) in a destination at 12 pm on any date. Unique visitor in this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



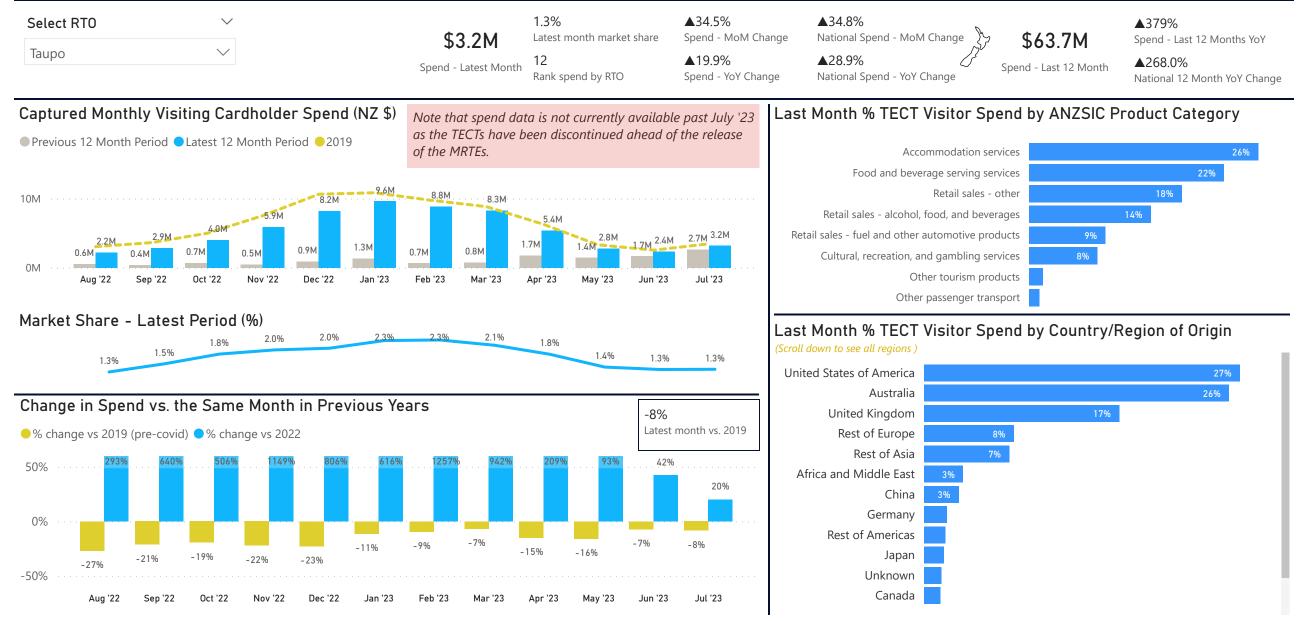
TECT Domestic Visitor Spend - Taupo - Jul'23





TECT International Visitor Spend - Taupo - Jul'23









 \sim Select RTO Note that spend data is not currently available past July '23 as the TECTs have been discontinued ahead of the release \checkmark Taupo of the MRTEs. Total Domestic Spend (\$M) -Domestic Visitor Spend by Region of Origin (\$M) - YE Jul '23 3.1% ▲ 6.5% YE Jul '23 Market Share (12 Months) (Scroll down to see all regions) \$357.4 YoY Change 10 Auckland \$82.6 **RTO Rank 12 Months Ending July 2019 2020 2021 2022 2023** Waikato Wellington \$400 30.7% Manawatu-Wanganui \$274 \$300 YE vs. 2019 Bay of Plenty \$45.4 Hawke's Bay \$35.3 \$271 \$200 Taranaki \$10.3 Northland \$9.2 \$100 \$0 \$20 \$40 \$60 \$80 \$0 Total International Spend (\$M) -International Visitor Spend by Country/Region of Origin (\$M) - YE Jul '23 1.9% ▲ 378.9% YE Jul '23 Market Share (12 Months) \$63.7 (Scroll down to see all regions) YoY Change 13 Australia **RTO** Rank **12 Months Ending July 2019 2020 2021 2022 2023** United States of America United Kingdom \$73 -12.8% \$6.2 \$64 Rest of Europe \$62 Other \$5.5 YE vs. 2019 \$50 Rest of Asia \$2.8 \$2.6 Germany \$14 Canada \$1.6 \$0 \$5 \$15 \$10 \$0

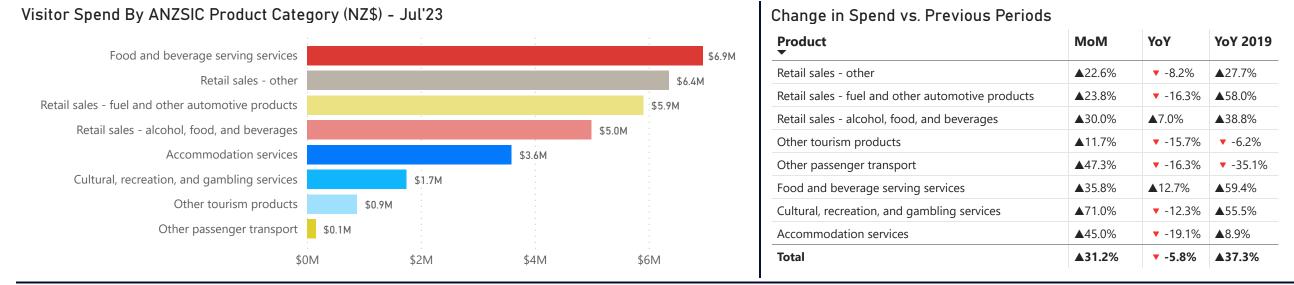
Note: Data represents electronic card transactions made in region (at a physical machine) and does not account for or estimate online transactions, direct transfers and cash. The data should be considered indicative of trends rather than representative of actual spend numbers. International spend also 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.



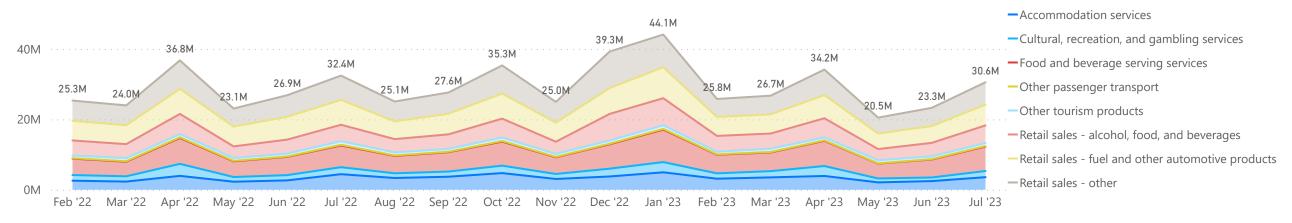


Select RTO \checkmark Taupo \checkmark

Note that spend data is not currently available past July '23 as the TECTs have been discontinued ahead of the release of the MRTEs.



Visitor Spend by ANZSIC Product Categoy (NZ\$)

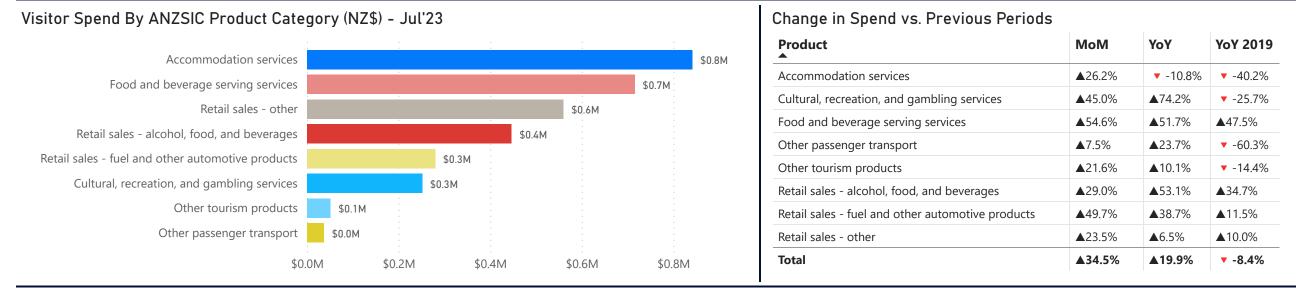


TECT International Visitor Spend By Product - Taupo - Jul'23

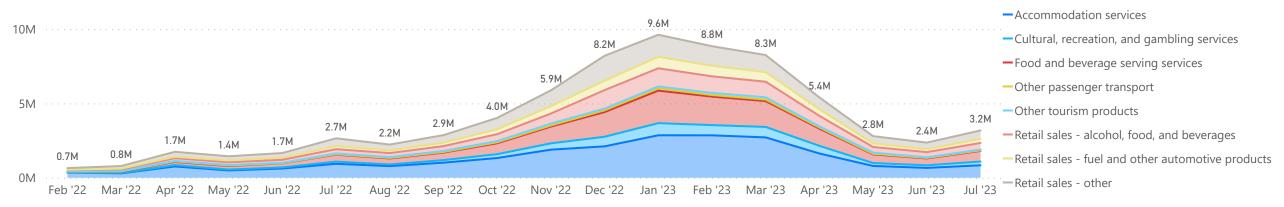


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Visitor Spend by ANZSIC Product Categoy (NZ\$)

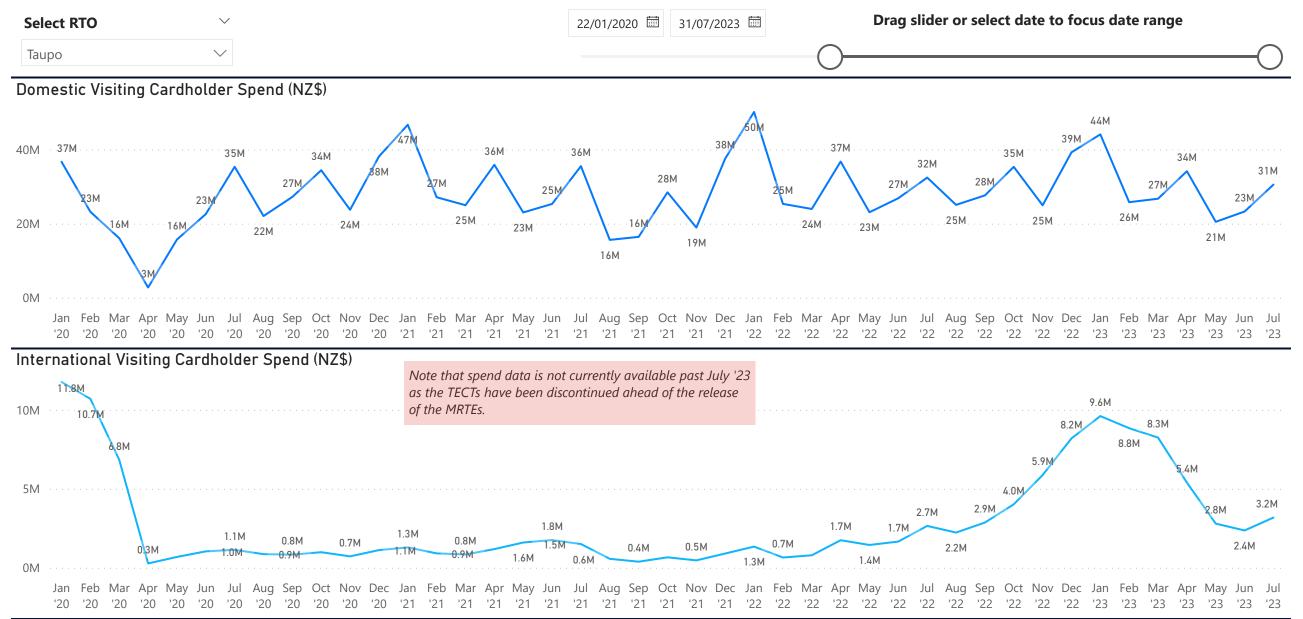


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TECT Visitor Spend - Taupo - Long Term View





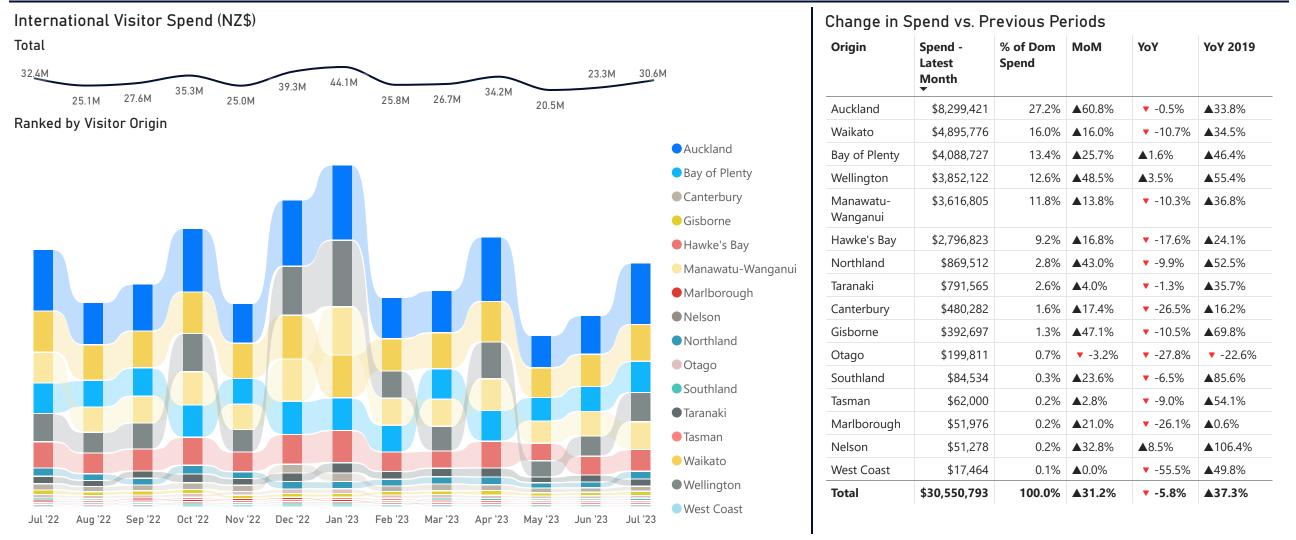
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Select RTO \checkmark Taupo \checkmark

Note that spend data is not currently available past July '23 as the TECTs have been discontinued ahead of the release of the MRTEs.

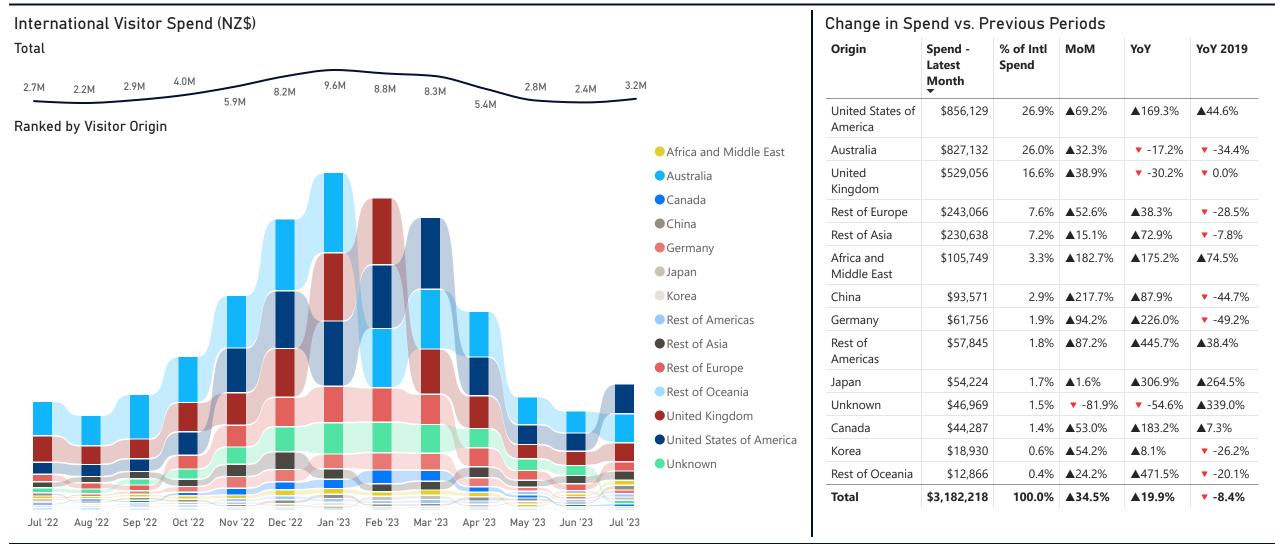


TECT International Visitor Spend By Origin - Taupo - Jul'23



Select RTO \checkmark Taupo \checkmark

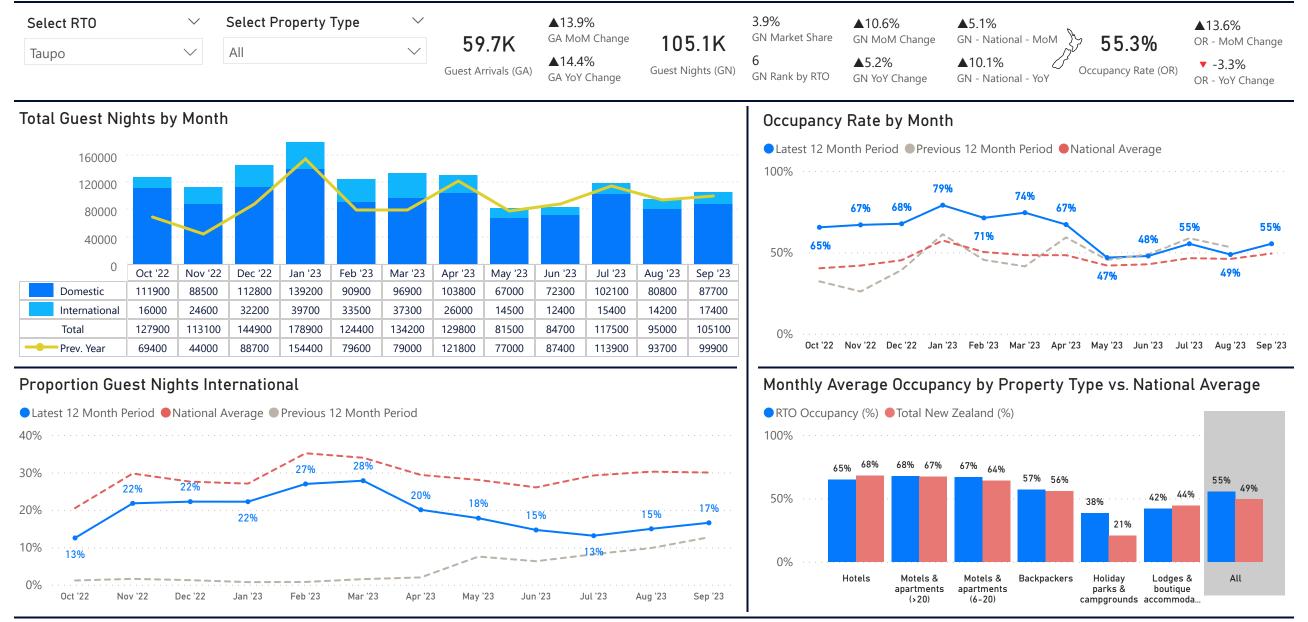
Note that spend data is not currently available past July '23 as the TECTs have been discontinued ahead of the release of the MRTEs.





ADP RTO Summary - Taupo - Sep'23



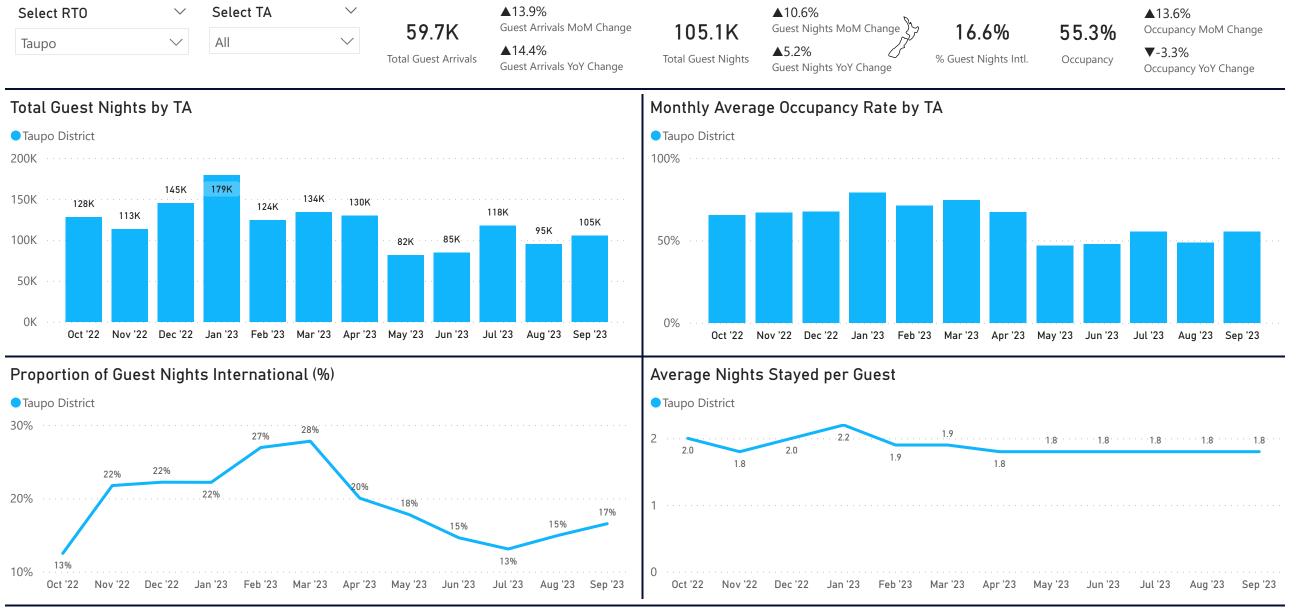


MoM (Month on Month): Change in reported month to previous month. | YoY (Year on Year): Change in reported month to same month last year. | Guest Arrivals: Number of guests stayed irrespective of stay length | Guest Nights: Number of guests multiplied by their stay length. E.g. 2 guests staying 3 nights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



ADP TA Summary - Taupo - Sep'23





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ADP Results - RTO Comparison - Sep'23



ADP Total Occupancy by RTO -Latest Month

Queenstown	69%	Queenstow
Auckland	67%	Aucklan
Wellington	65%	Manawat
Manawatu	62%	Wellingto
Dunedin	56%	Dunedi
Taupo	55%	Canterbur
Canterbury	55%	Waikat
Ruapehu	52%	Ruapeh
Southland	51%	Mackenzi
Rotorua	50%	Wanak
Waikato	50%	Hawke's Ba
Mackenzie	50%	Taup
All NZ	49%	All N
Hawke's Bay	48%	Southlan
Marlborough	46%	Marlboroug
Whanganui	45%	Tarana
Wanaka	43%	Whangan
Bay of Plenty	42%	Rotoru
Taranaki	41%	Waita
Hurunui	41%	Huruni
Fiordland	40%	Fiordlan
Waitaki	40%	Timar
Kaikoura	38%	Bay of Plent
Timaru	38%	Wairarap
Wairarapa	35%	Gisborn
Nelson Tasman	31%	Nelson Tasma

ADP Total Occupancy by RTO -Previous Month

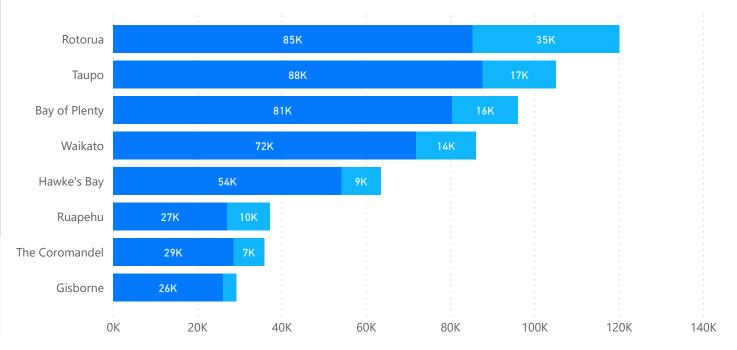
74%		Queenstown
67%		Auckland
64%	6	Manawatu
62%	6:	Wellington
9%	59	Dunedin
6	53%	Canterbury
b	53%	Waikato
	52%	Ruapehu
	49%	Mackenzie
	49%	Wanaka
	49%	Hawke's Bay
	49%	Taupo
	48%	All NZ
	46%	Southland
	46%	Marlborough
	44%	Taranaki
	42%	Whanganui
	41%	Rotorua
	38%	Waitaki
	37%	Hurunui
	36%	Fiordland
	36%	Timaru
	36%	Bay of Plenty
	32%	Wairarapa
	29%	Gisborne
	29%	Velson Tasman

ADP Key Stats - Latest Month

Measure	Bay of Plenty	Gisborne	Hawke's Bay	Rotorua	Ruapehu	Таиро	The Coromandel	Waikato
Average nights stayed per guest	2.60	2.30	2.20	2.10	2.10	1.80	2.00	2.20
Guest arrivals	36,900.00	12,800.00	29,100.00	56,800.00	17,800.00	59,700.00	18,300.00	39,600.00
Occupancy rate	0.42	0.26	0.48	0.50	0.52	0.55	0.21	0.50
Proportion of international GN	0.16	0.11	0.15	0.29	0.27	0.17	0.20	0.17
Total guest nights	96,100.00	29,300.00	63,500.00	120,100.00	37,200.00	105,100.00	35,900.00	86,100.00

ADP Guest Nights - Latest Month

Measure • Domestic guest nights • International guest nights

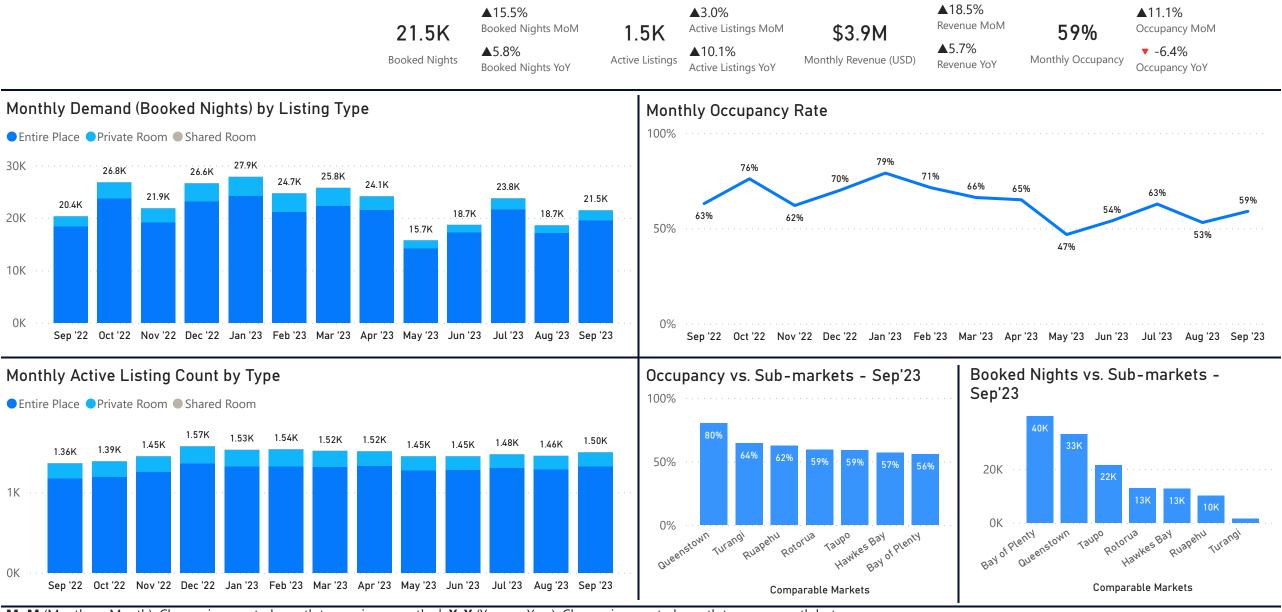


Guest Arrivals: Number of guests stayed irrespective of stay length | Guest Nights: Number of guests multiplied by their stay length. E.g. 2 guests staying 3 nights equate to 6 guest nights. | Occupancy: Ratio of occupied stay units by available stay units.



Short Term Rental Stats - Taupo - Sep'23



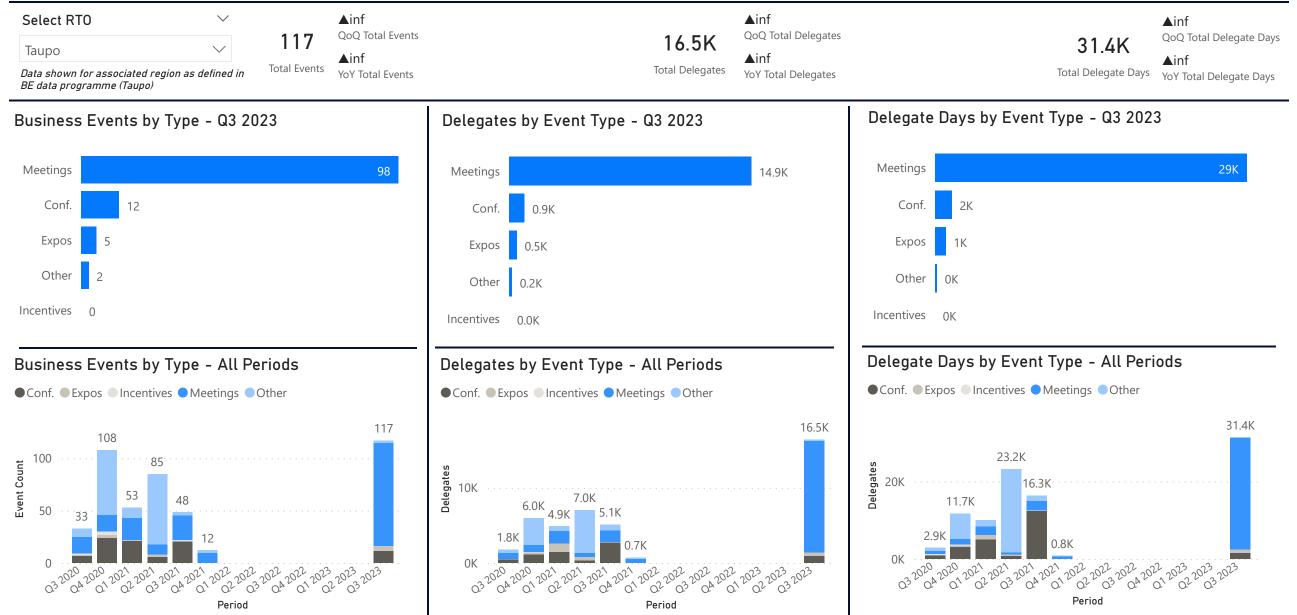


MoM (Month on Month): Change in reported month to previous month. | **YoY** (Year on Year): Change in reported month to same month last year. **Source:** AirDNA Monthly Trend Reporting via DGLT



Business Events Data - Taupo - Q3 2023



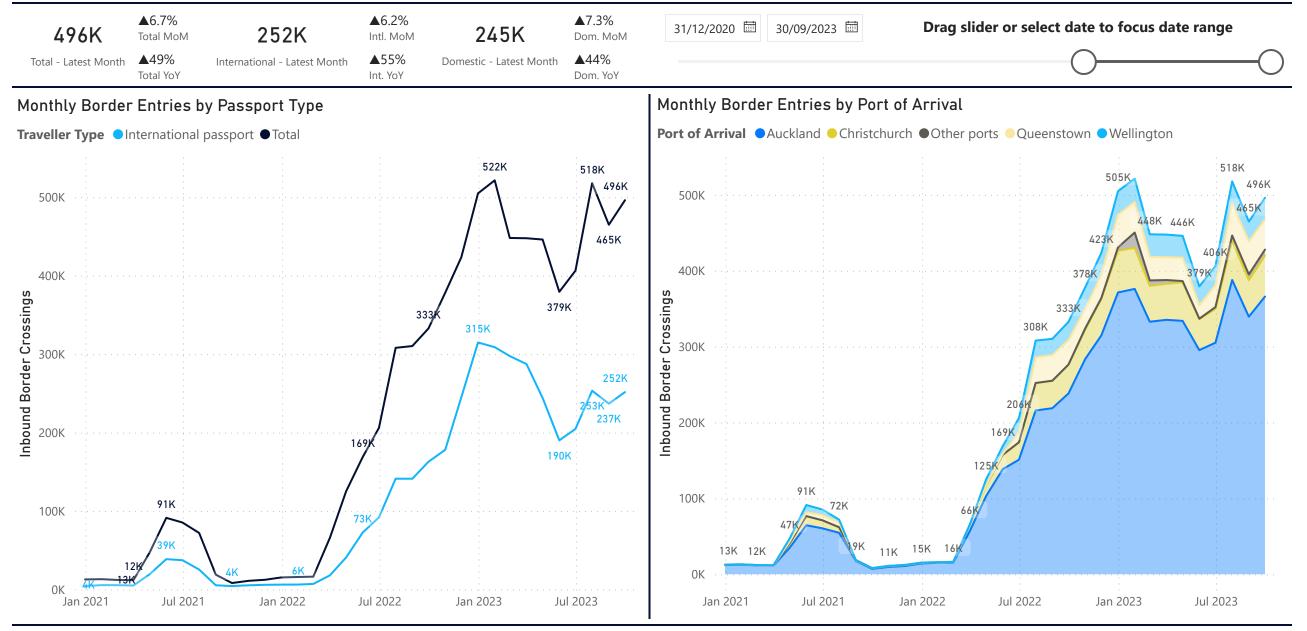


Note: Some regions may not show any data. Due to lack of submissions regional level results are hidden to maintain confidentiality of submitters. | QoQ (Quarter on Quarter): Change in reported quarter to previous quarter. | YoY (Year on Year): Change in reported quarter to same quarter last year.

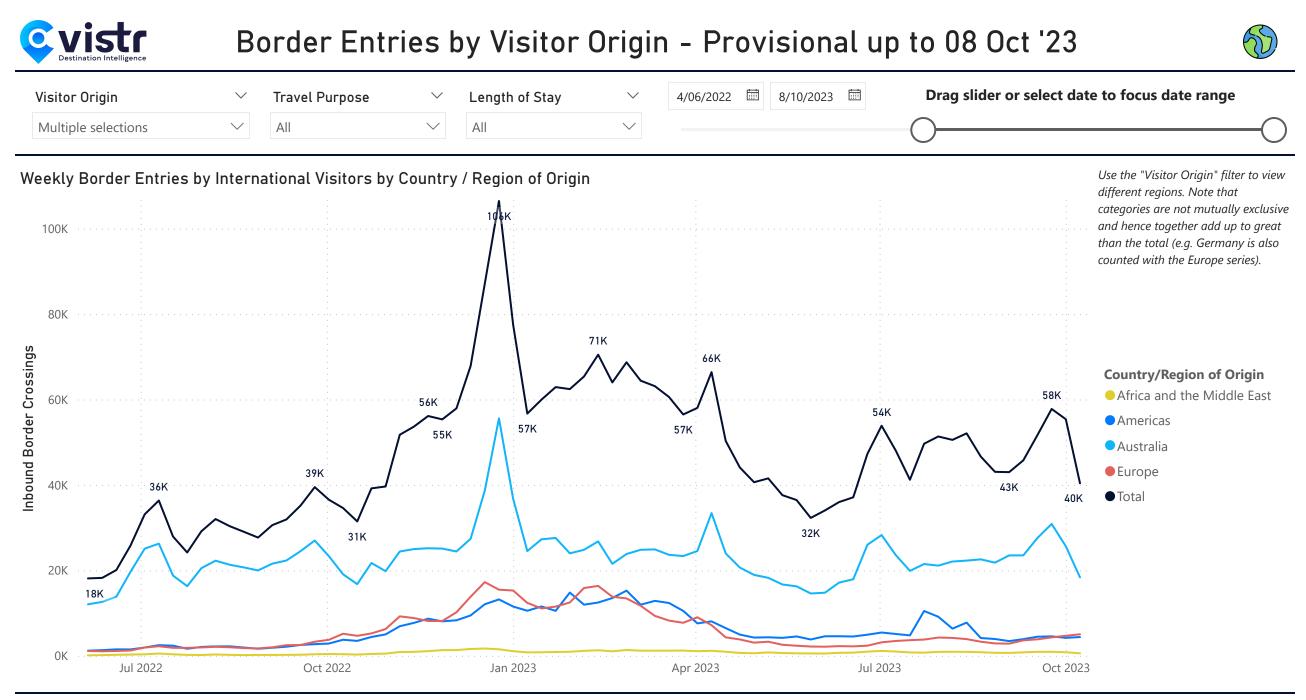


New Zealand Inbound Border Crossing Data up to 30 Sep '23

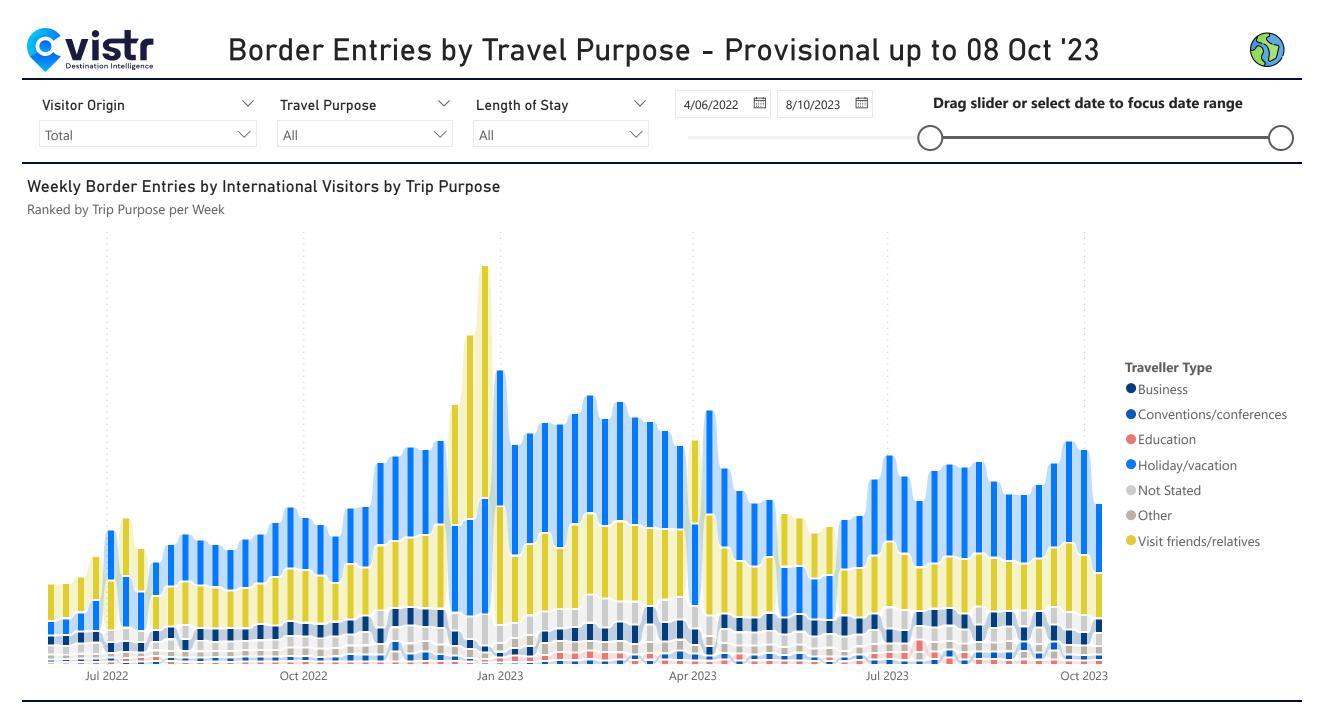




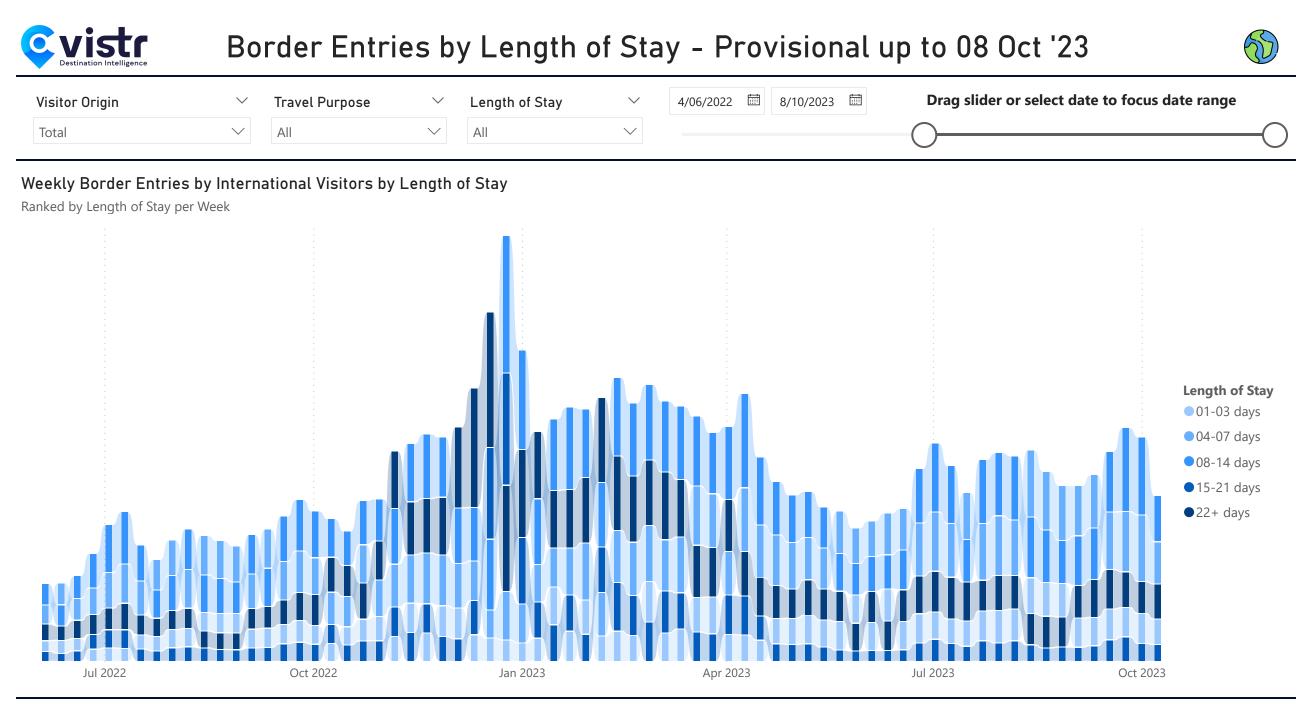
Source: StatsNZ COVID-19 data portal



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



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