

October 2022 Insights Report for Taupō RTO area



As usual, October was a strong month for Taupo district with month-on-month increases in all key metrics, ranging 25-40% as the region clearly benefited from the October school holidays and Labour Day weekend. The data also shows significant year-on-year increases, partly driven by increasing international visitation, but must be read in context of the impact of the COVID alert level settings as noted below.

Visitation:

- 340k visitor days over the course of the month from c.176k unique visitors*
- Peak visitation for the month was c.23k on 23rd October – Labour Day Sunday
- International % visitor days remains low: 7% for Taupo vs. 14% nationally.

Spending:

- Domestic visitor spending up 28% on September and 37% above the same month in 2019
- Auckland accounted for >25% of domestic spending
- International visitor spending up 42% on September, just 15% below the same month in 2019
- Australia the largest international market, with 36%, followed by UK with 28% and USA with 13%
- Market share of international spending trending upwards from 1.3% in August to 1.8% in October

Accommodation:

- 127k commercial accommodation guest nights were recorded in the ADP: 28% up from September in line with spending
- Proportion of guests international remained at 12%, now below the national average
- Average occupancy of 65% due to particular strength in Hotels & Motels and remains significantly above the national average
- Average nights stayed per guest in commercial accommodation rose to 2.0
- Nearly 27k nights were booked through peer to peer booking platforms, 32% up from September, with an average occupancy rate of 74%.

Borders:

- Inbound border crossings continued increasing in October with nearly 380k border entries made during the month
- 47% (180k) were from international passport holders

Covid note: At the start of October '21, all of New Zealand was at covid Alert Level 2, aside from Auckland which remained at Alert Level 3 with a patrolled border in place to prevent free travel between Auckland and the rest of the country, removing Auckland domestic travelers from the market until early December when the traffic light system was introduced. Between the 3rd and 8th the majority of the Waikato district was moved to level 3 and parts remained there until mid-November. This caused significant disruption to domestic tourism and year-on-year comparisons must be read with this in mind. For more details see the government alert level timeline [here](#).

**distinct visitor count is taken from the new MBIE "MURPE" dataset and whilst not directly comparable to the daily device count gives an approximate point of comparison.*



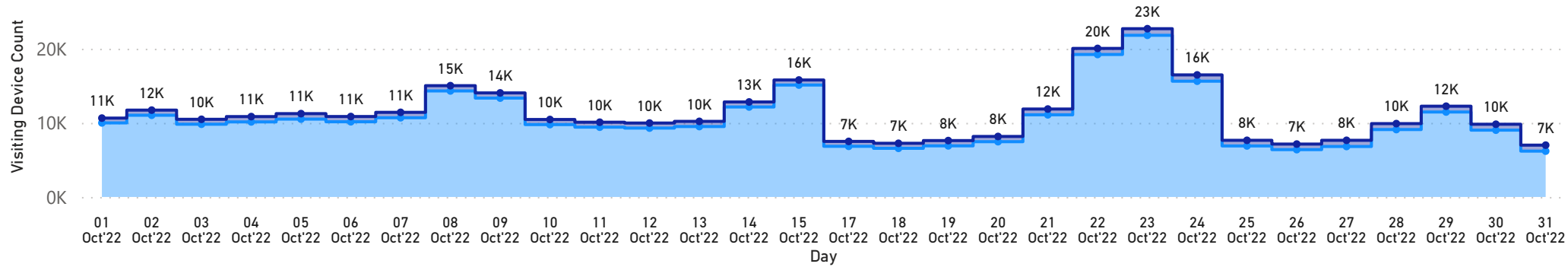
Select RTO
Taupo

338.5K Total Visitor Days (Month)	2.2% Market Share – Visitor Days	▲31.4% Visitor Days - MoM Change	▲18.2% Visitor Days - National MoM	11.3K Daily Average (Latest Month)	22704 Max Daily Visitor #	6.5% % International
	12 RTO Rank - Visitor Days	▲34.5% Visitor Days - YoY Change	▲63.0% Visitor Days - National YoY		6993 Min Daily Visitor #	



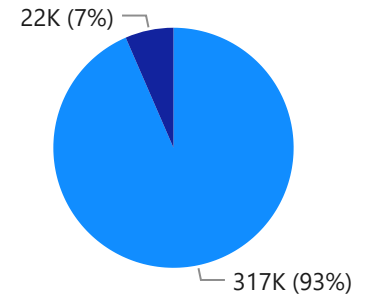
Daily Visitor Count (12 midday snapshot) - Oct'22

● Domestic ● International



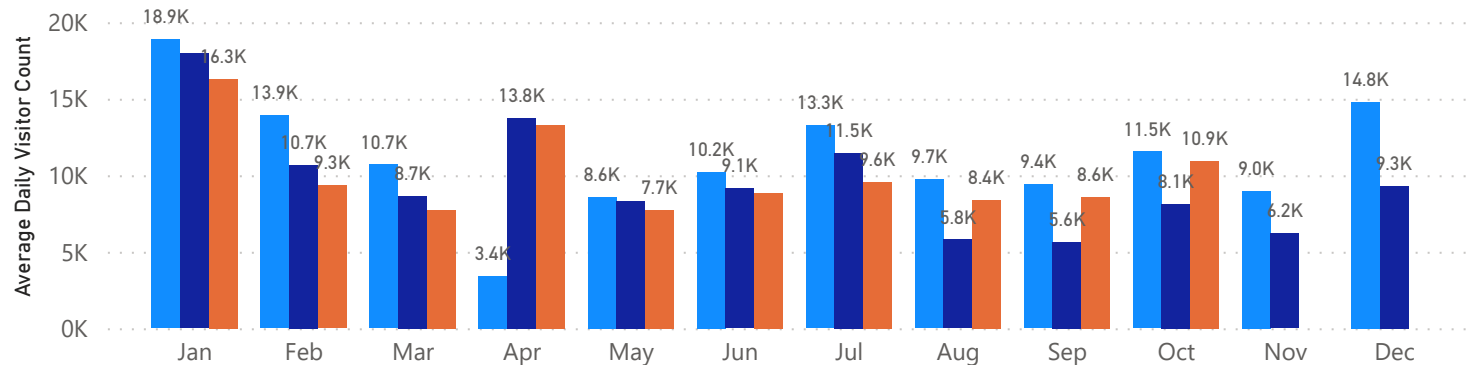
Total Visitor Days – Domestic vs. International

● Domestic ● International

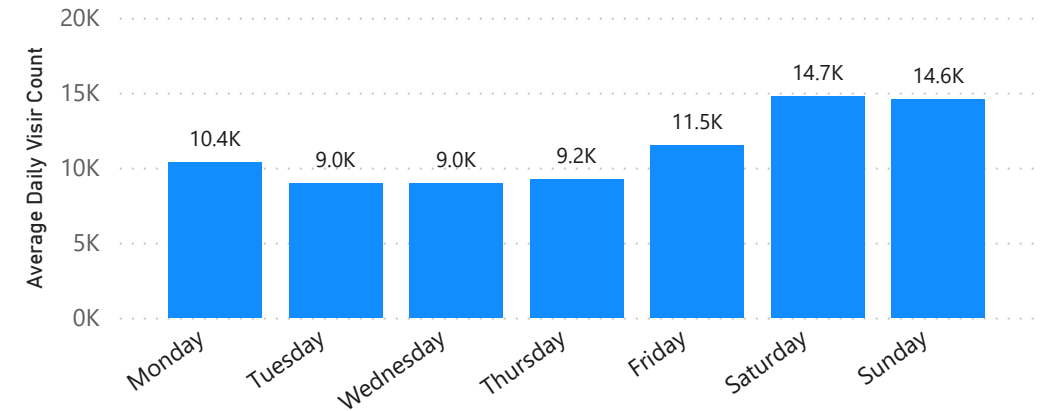


Average Daily Visitor Count by Month

Year ● 2020 ● 2021 ● 2022



Average Daily Visitor Count for Oct'22 by Day of the Week



** MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month last year | **YE (Year Ending) - Sum of the 12 months ending
Visitor Day: 1 day spent by 1 visitor in the destination. So 1 person staying 4 days = 4 visitor days | **Daily Average Visitor Count:** Average number of individual visitors in a destination at 12 midday on any date



Select RTO
Taupo

\$34.7M
Spend - Latest Month

3.3%
Latest month market share


9
Rank spend by RTO

▲27.5%
Spend - MoM Change

▲22.6%
Spend - YoY Change

▲2.4%
National Spend - MoM Change

▲34.0%
National Spend - YoY Change

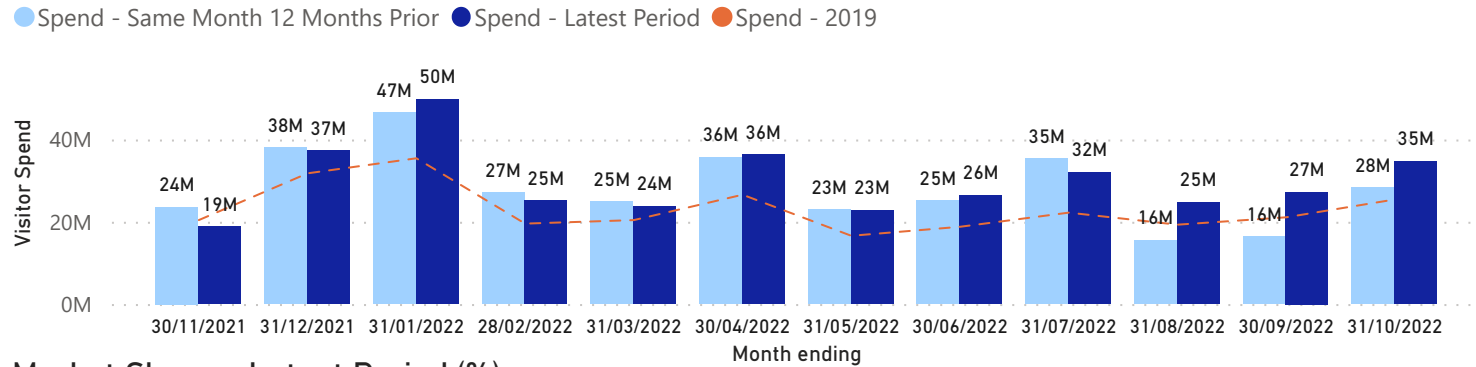


\$359.3M
Spend - Last 12 Month

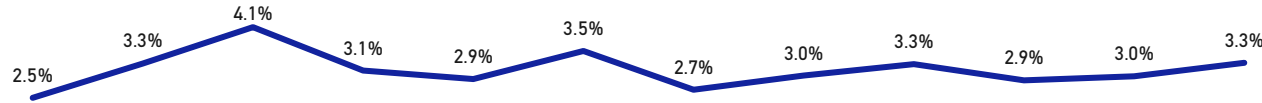
▲6%
Spend - Last 12 Months YoY

▲4.0%
National 12 Month YoY Change

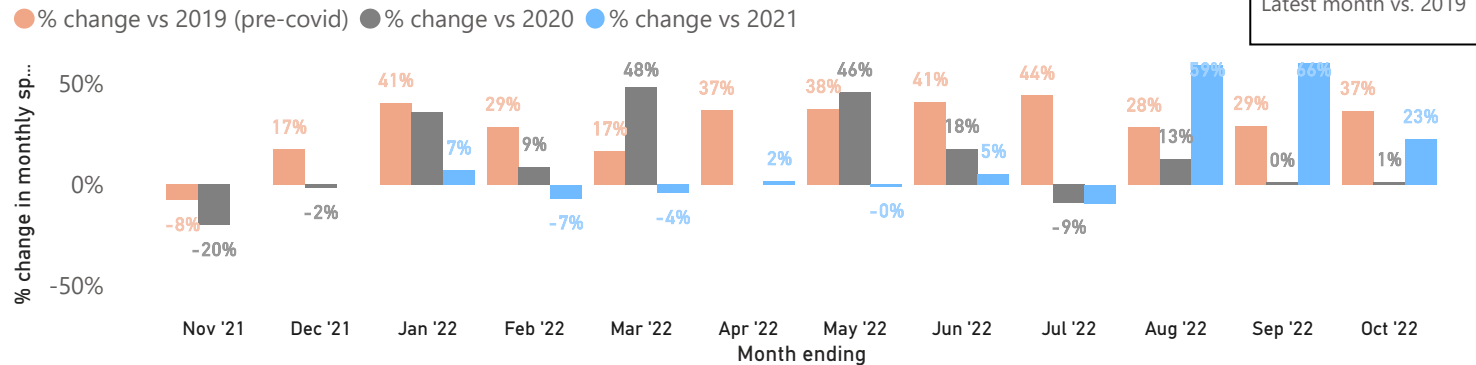
Captured Monthly Visiting Cardholder Spend (NZ \$)



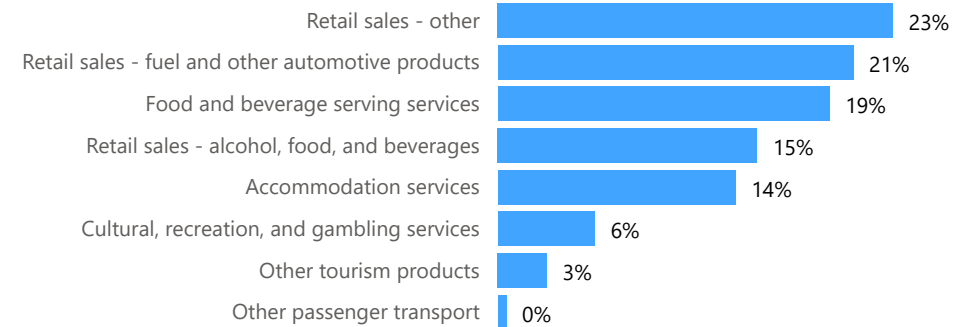
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

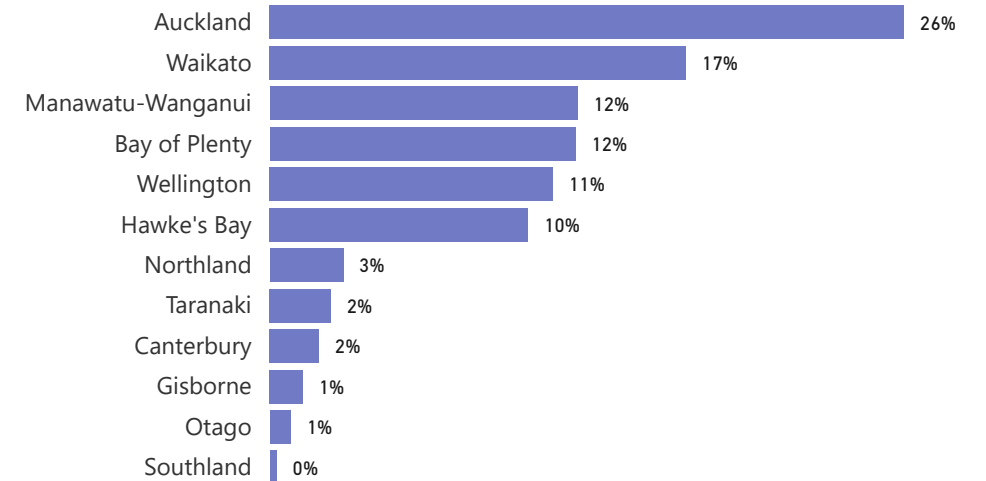


Last Month % TECT Visitor Spend by ANZSIC Product Category



Last Month % TECT Visitor Spend by Country/Region of Origin

(Scroll down to see all regions)



Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions:** MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month of the previous year



Select RTO
Taupo

\$4.2M
Spend - Latest Month

1.8%
Latest month market share

13
Rank spend by RTO

▲41.9%
Spend - MoM Change

▲529.1%
Spend - YoY Change

▲15.7%
National Spend - MoM Change

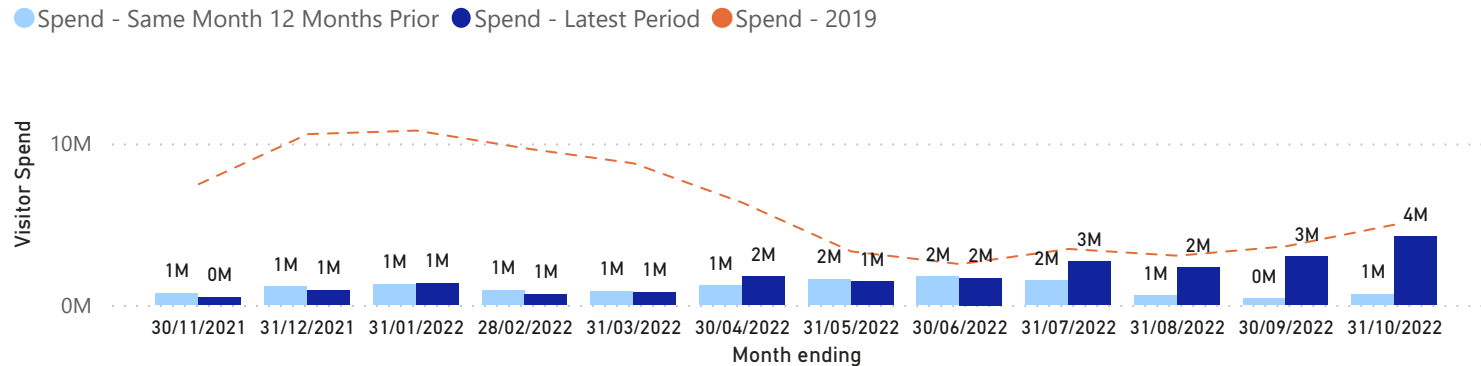
▲437.0%
National Spend - YoY Change

\$21.3M
Spend - Last 12 Month

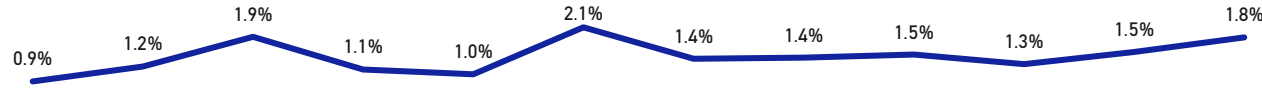
▲69%
Spend - Last 12 Months YoY

▲81.0%
National 12 Month YoY Change

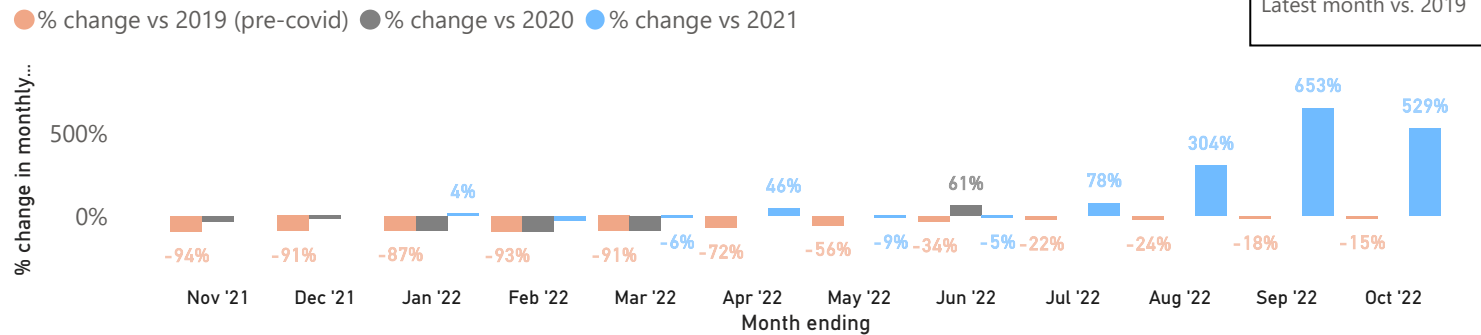
Captured Monthly Visiting Cardholder Spend (NZ \$)



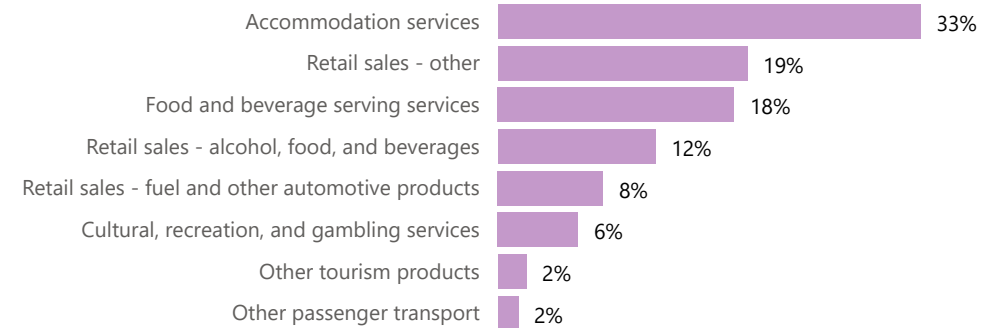
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

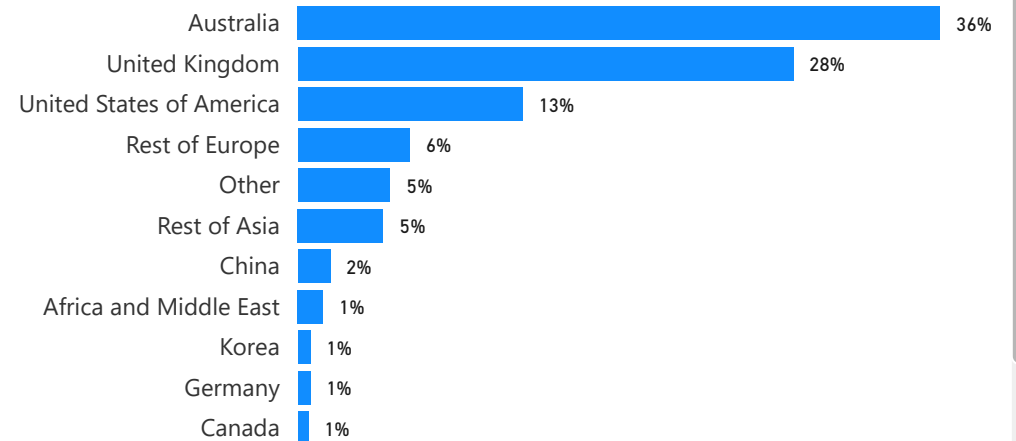


Last Month % TECT Visitor Spend by ANZSIC Product Category



Last Month % TECT Visitor Spend by Country/Region of Origin

(Scroll down to see all regions)



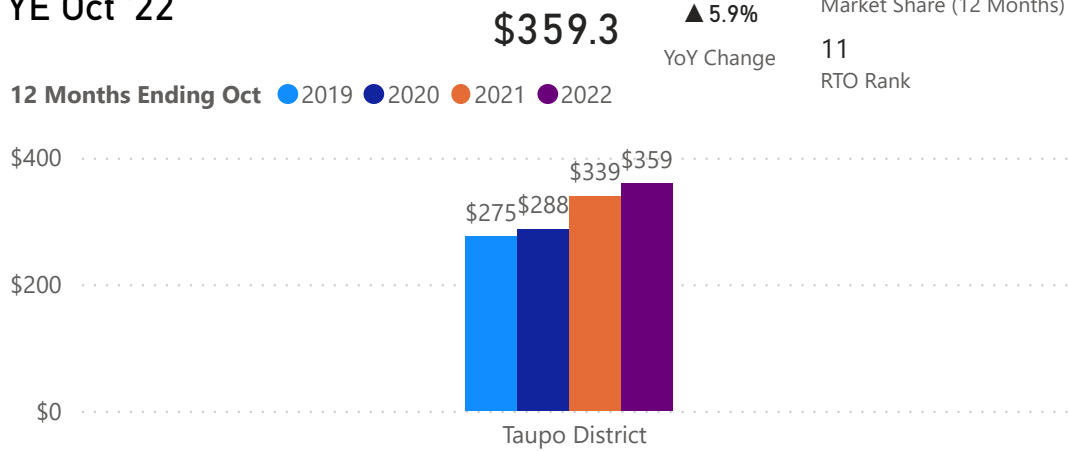
Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend'. International spend also include those living and working within New Zealand using cards issued by overseas banks and would also capture repatriating kiwis still using their overseas cards.

Definitions: MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month of the previous year

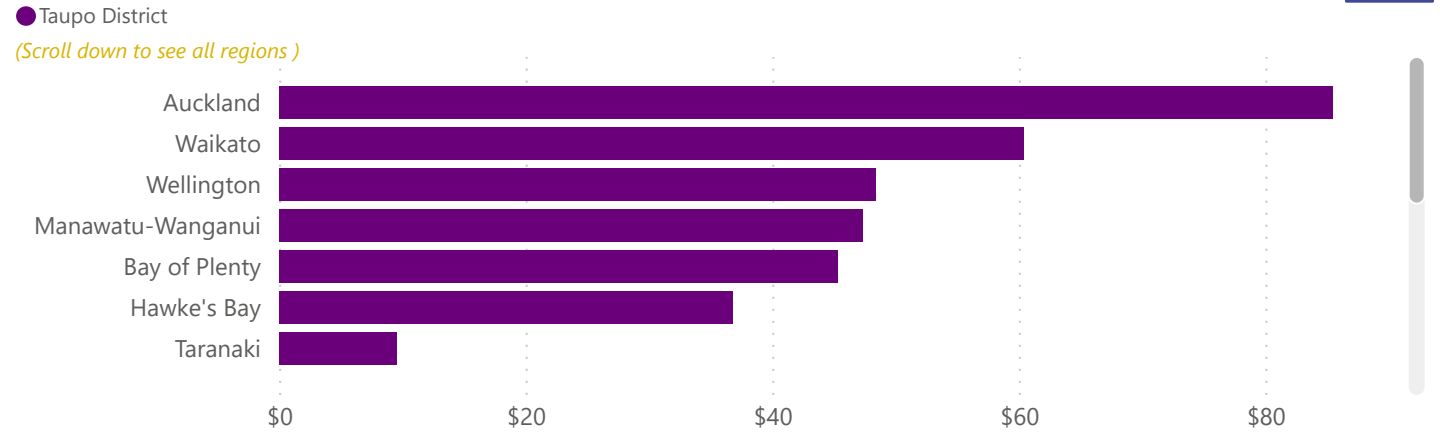


Select RTO: Taupo
Select TA: All

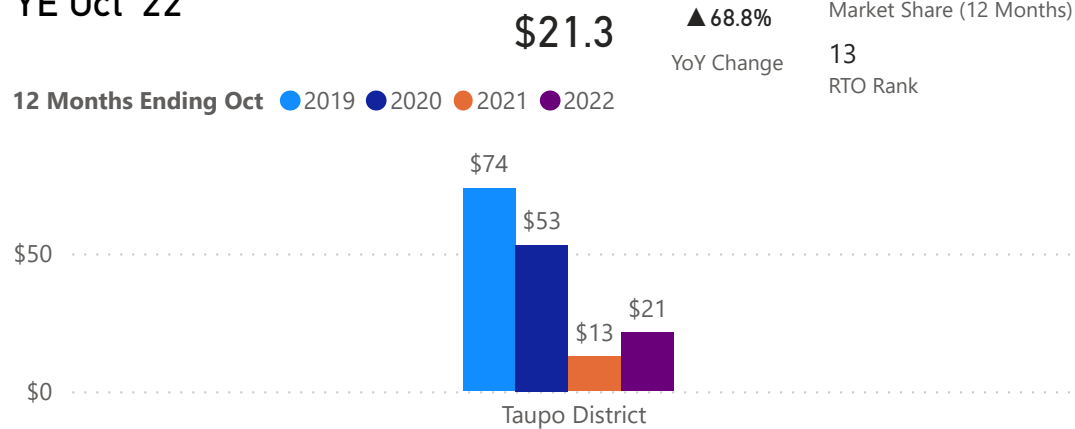
Total Domestic Spend (\$M) - YE Oct '22



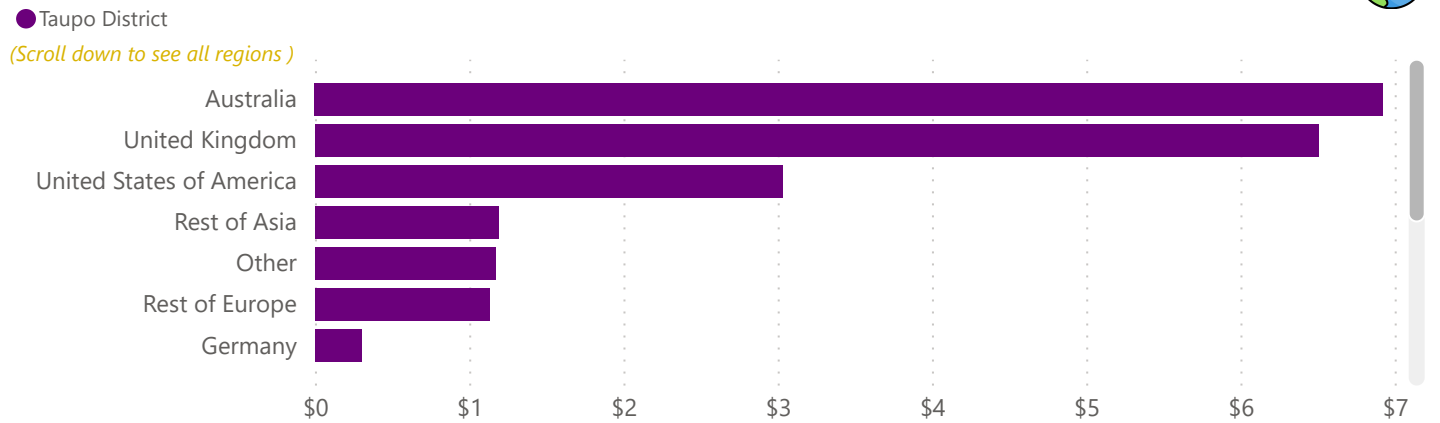
Domestic Visitor Spend by Region of Origin (\$M) - YE Oct '22



Total International Spend (\$M) - YE Oct '22



International Visitor Spend by Region of Origin (\$M) - YE Oct '22



Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend'. International spend also include those living and working within New Zealand using cards issued by overseas banks and would also capture repatriating kiwis still using their overseas cards.

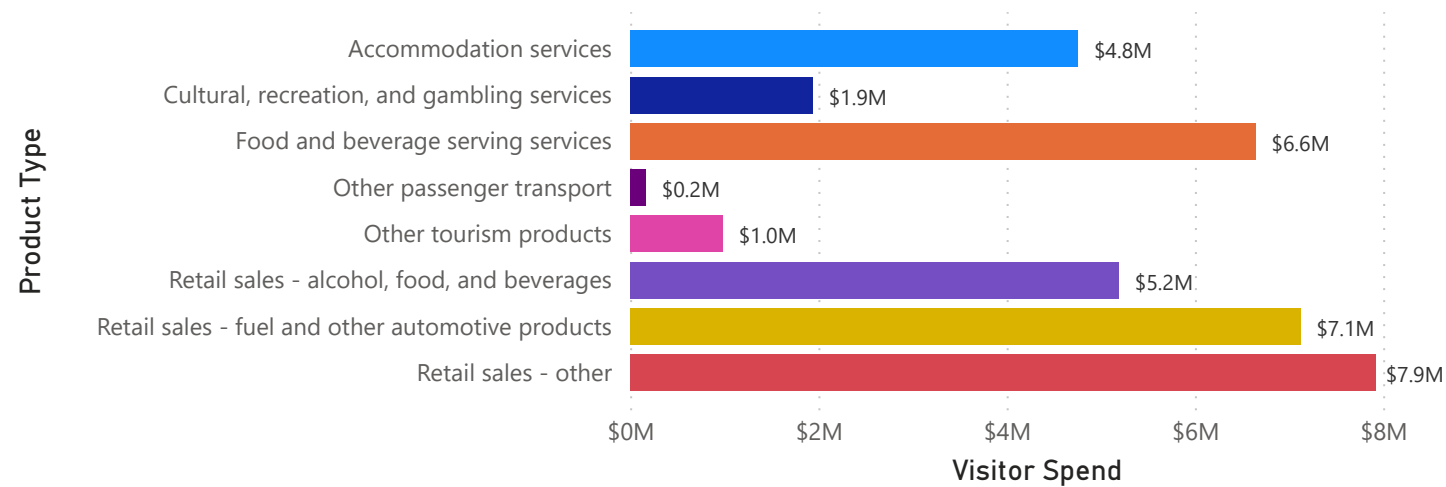
Definitions: MoM (Month on Month Change) - Compares reported month to previous month | YoY (Year on Year Change) - Compares reported month to same month of the previous year | YE (Year Ending) - Sum of the 12 months up to

TECT Domestic Visitor Spend By Product - Taupo - Month Ending 31 Oct'22



Select RTO ▼
 Taupo ▼

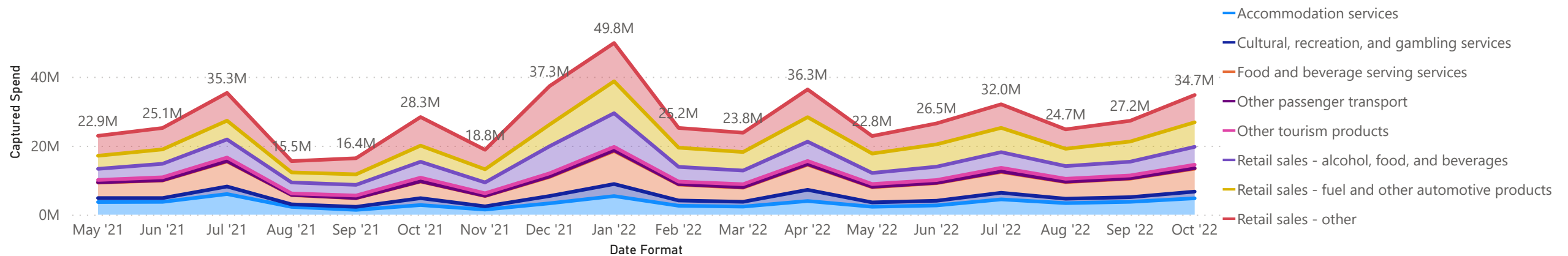
Visitor Spend By ANZSIC Product Category (NZ\$) - Oct'22



Change in Spend vs. Previous Periods

Product	MoM	YoY	YoY 2019
Accommodation services	▲27.5%	▲70.5%	▲21.5%
Cultural, recreation, and gambling services	▲43.9%	▼-3.1%	▲30.2%
Food and beverage serving services	▲23.9%	▲37.9%	▲37.6%
Other passenger transport	▲35.9%	▲96.0%	▼-11.4%
Other tourism products	▲21.5%	▼-6.1%	▲12.8%
Retail sales - alcohol, food, and beverages	▲29.9%	▲12.5%	▲26.8%
Retail sales - fuel and other automotive products	▲21.7%	▲52.3%	▲62.9%
Retail sales - other	▲31.7%	▼-4.5%	▲39.7%
Total	▲27.5%	▲22.6%	▲36.5%

Visitor Spend by ANZSIC Product Category (NZ\$)



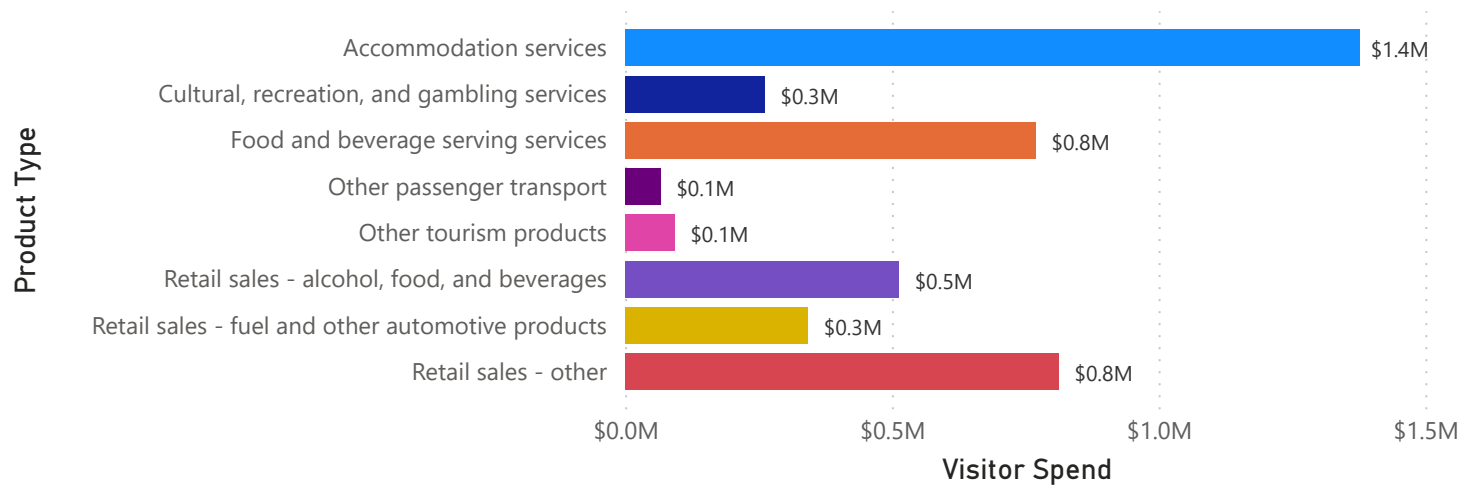
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TECT International Visitor Spend By Product - Taupo - Month Ending 31 Oct'22



Select RTO ▼
 Taupo ▼

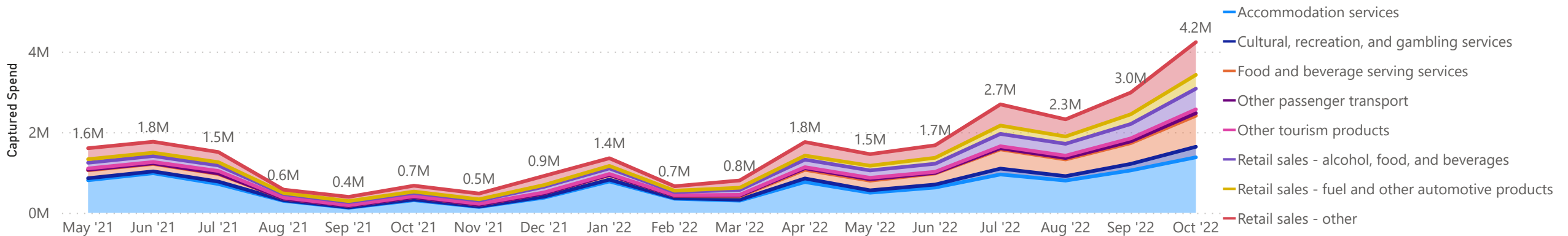
Visitor Spend By ANZSIC Product Category (NZ\$) - Oct'22



Change in Spend vs. Previous Periods

Product	MoM	YoY	YoY 2019
Accommodation services	▲31.0%	▲340.8%	▼-24.9%
Cultural, recreation, and gambling services	▲61.3%	▲1215.3%	▼-48.3%
Food and beverage serving services	▲49.3%	▲1239.5%	▲1.7%
Other passenger transport	▲51.8%	▲4294.6%	▼-53.8%
Other tourism products	▲25.1%	▲350.5%	▼-6.7%
Retail sales - alcohol, food, and beverages	▲43.8%	▲524.3%	▲0.0%
Retail sales - fuel and other automotive products	▲42.3%	▲948.1%	▼-15.0%
Retail sales - other	▲50.6%	▲455.0%	▲11.7%
Total	▲41.9%	▲529.1%	▼-15.0%

Visitor Spend by ANZSIC Product Category (NZ\$)



Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend'. International spend also include those living and working within New Zealand using cards issued by overseas banks and would also capture repatriating kiwis still using their overseas cards.

Definitions: MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month of the previous year

TECT Historic Visitor Spend By Product in Taupo RTO Area



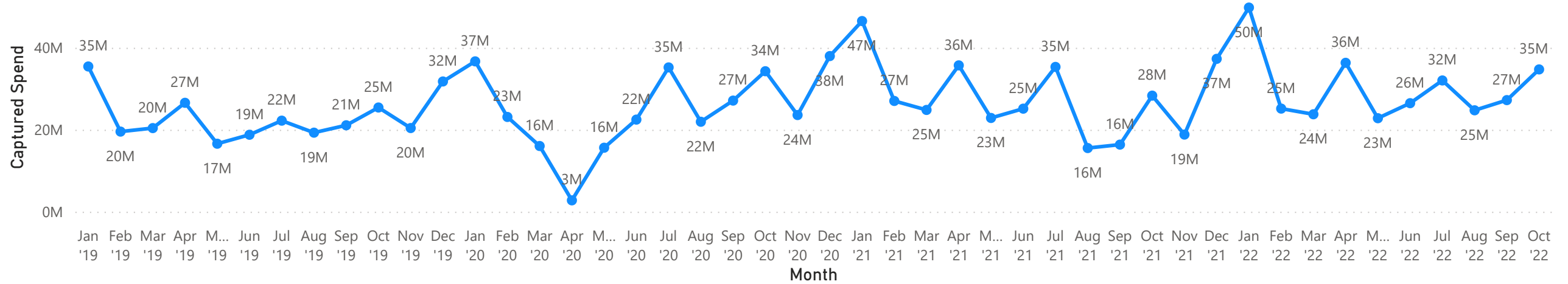
Select RTO ▼
Taupo ▼

31/01/2019 31/10/2022

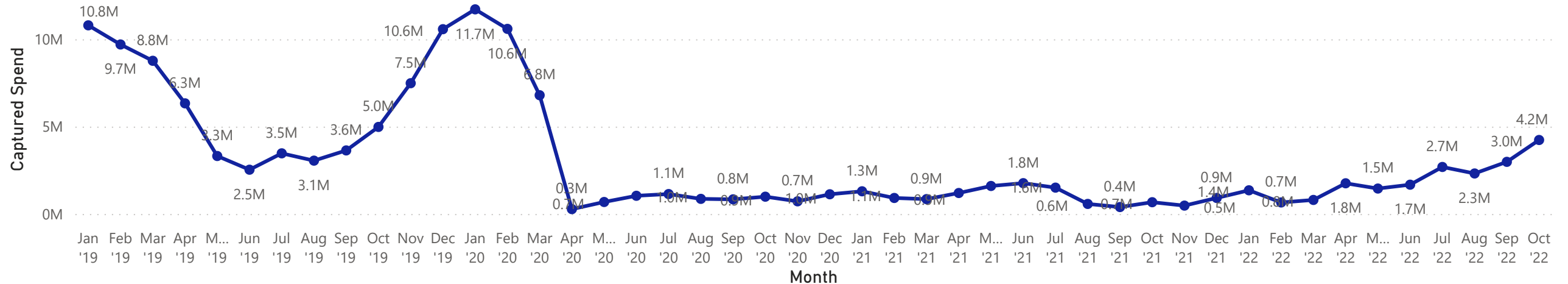
Drag slider to focus date range



Domestic Visiting Cardholder Spend (NZ\$)



International Visiting Cardholder Spend (NZ\$)



Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend'. International spend also include those living and working within New Zealand using cards issued by overseas banks and would also capture repatriating kiwis still using their overseas cards.

TECT International Visitor Spend by Country/Region of Origin



Select RTO
Taupo

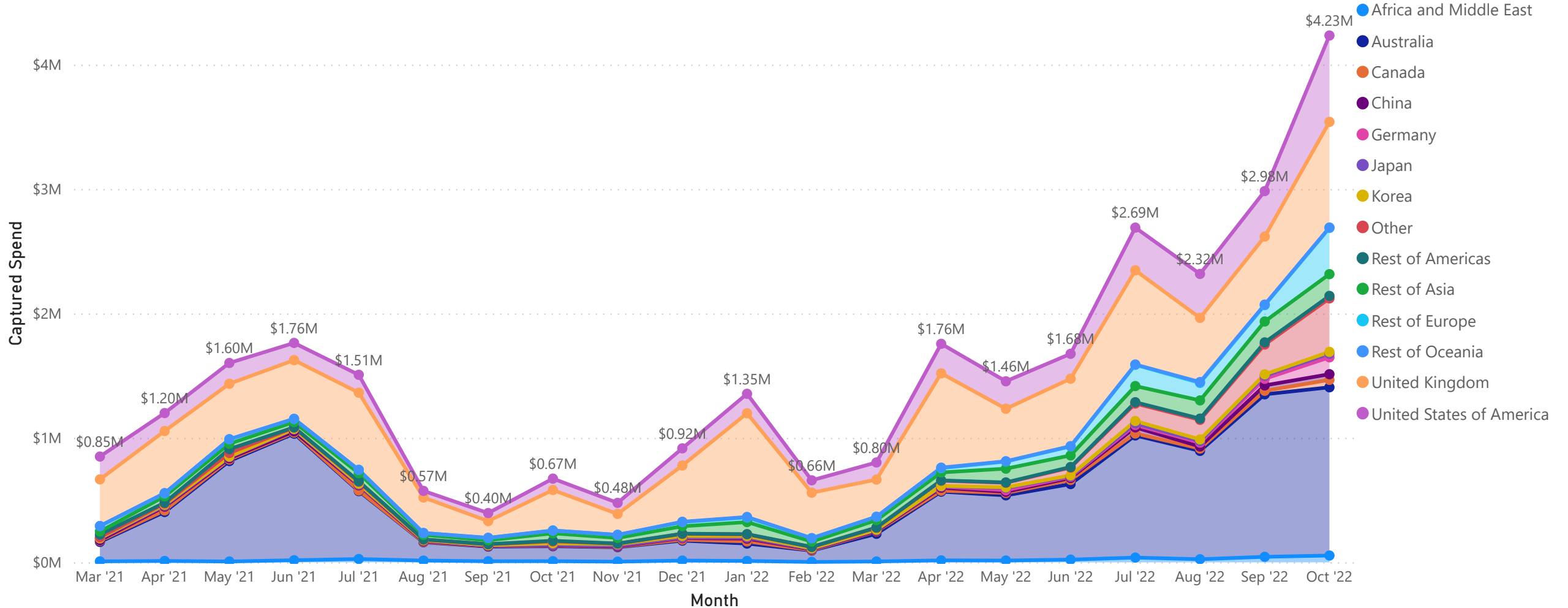
Select Visitor Origin
All

22/03/2021 31/10/2022

Drag slider to focus date range



International Visiting Cardholder Spend (NZ\$ M)



Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. International spend also include those living and working within New Zealand using cards issued by overseas banks and would also capture repatriating kiwis still using their overseas cards.

TECT Domestic Visitor Spend - Taupo - Month Ending 31 Oct'22

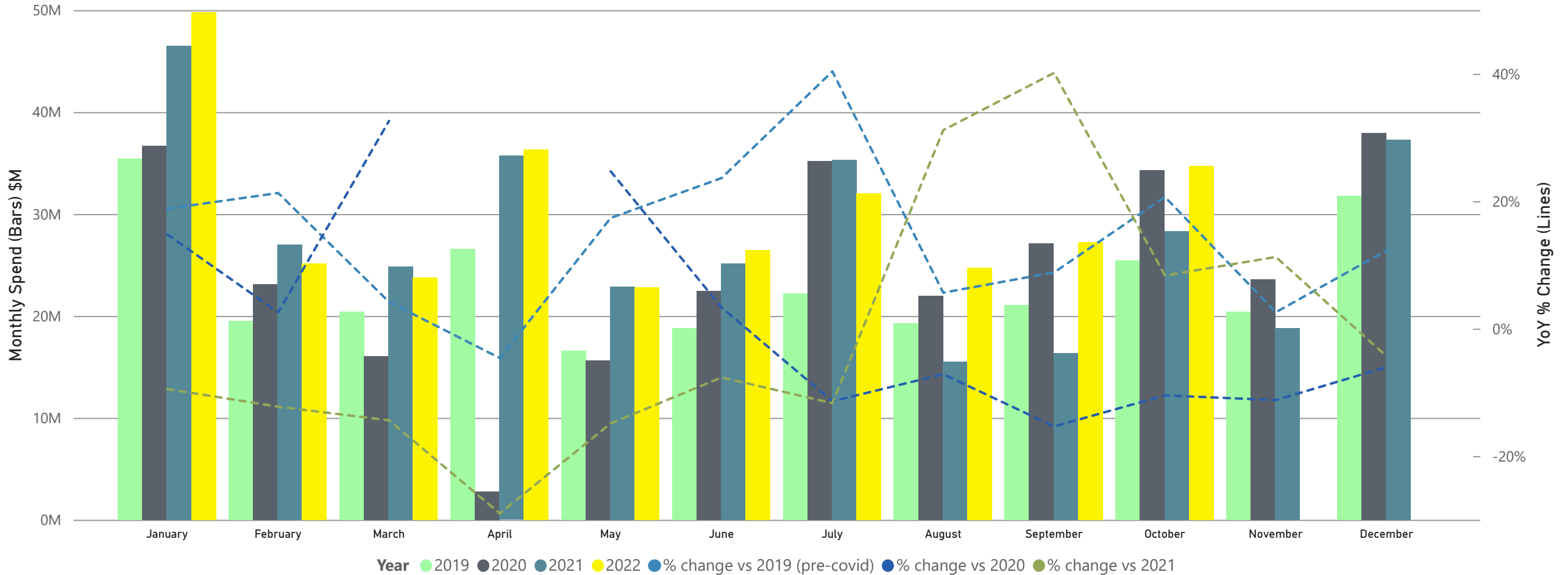


Select RTO
Taupo

▲27.5% MoM 3.3% Share ▲2.4% National MoM ▲6% YoY
▲22.6% YoY 9 RTO Rank ▲34.0% National YoY ▲4.0% National YoY
\$34.7M Spend - Latest Month **\$359.3M** Spend - Last 12 Month



Monthly Visitor Spend (Bars) and YoY Change (Lines)



Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions:** **MoM** (Month on Month Change) - Compares reported month to previous month | ****YoY** (Year on Year Change) - Compares reported month to same month of the previous year



Select RTO: Select Property Type:

64.2K Guest Arrivals (GA) ▲22.5% GA MoM Change
▲82.9% GA YoY Change

127.5K Guest Nights (GN)

4.2% GN Market Share
 6 GN Rank by RTO

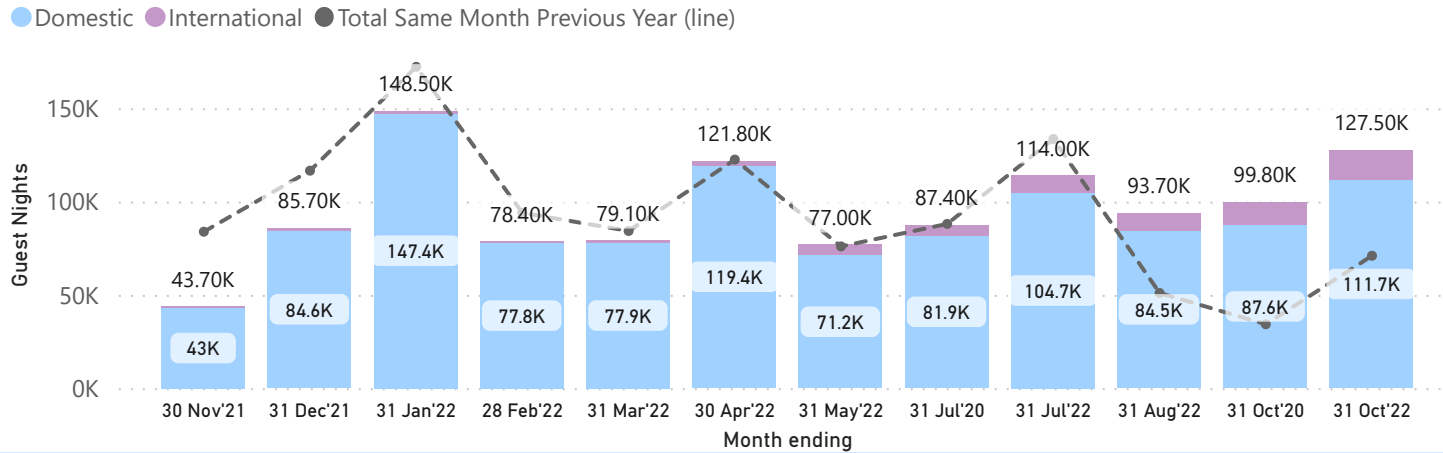
▲27.6% GN MoM Change
▲83.7% GN YoY Change

▲23.5% GN - National - MoM
▲94.2% GN - National - YoY

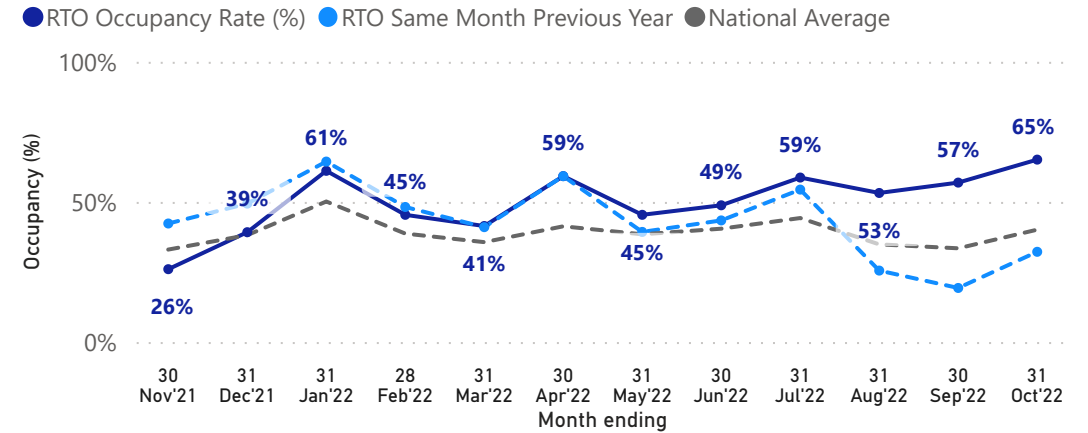


65.1% Occupancy Rate (OR) ▲14.4% OR - MoM Change
▲102.2% OR - YoY Change

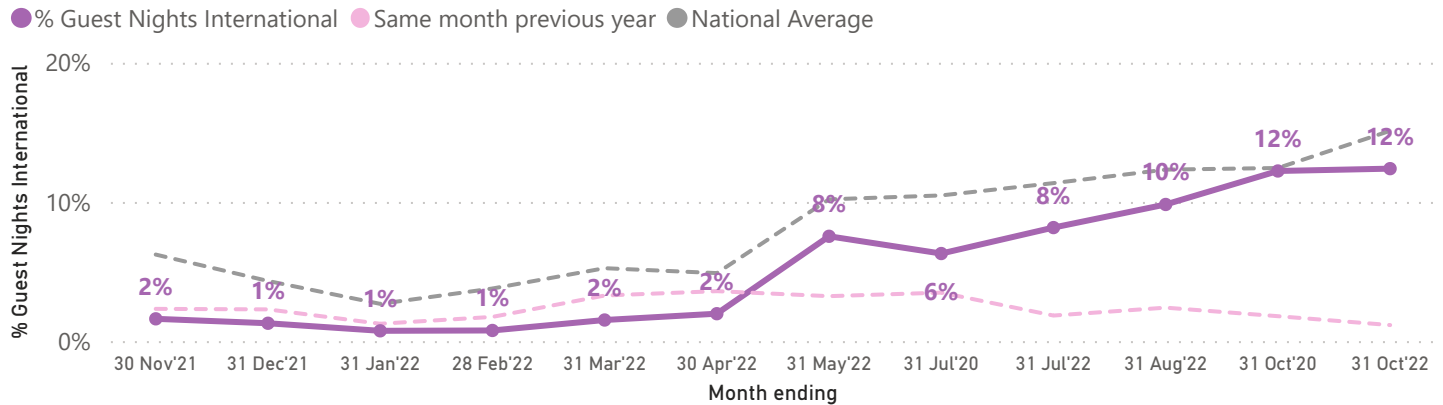
Total Guest Nights by Month



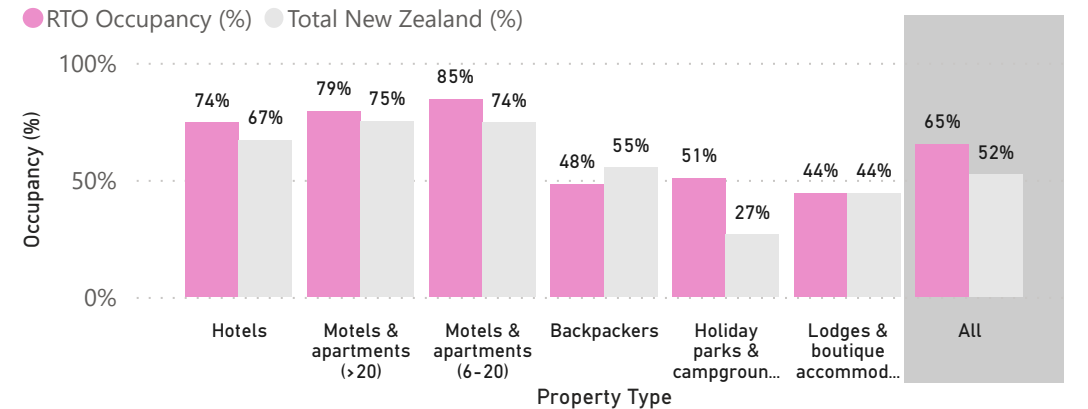
Occupancy Rate by Month



Proportion Guest Nights International



Monthly Average Occupancy by Property Type vs. National Average



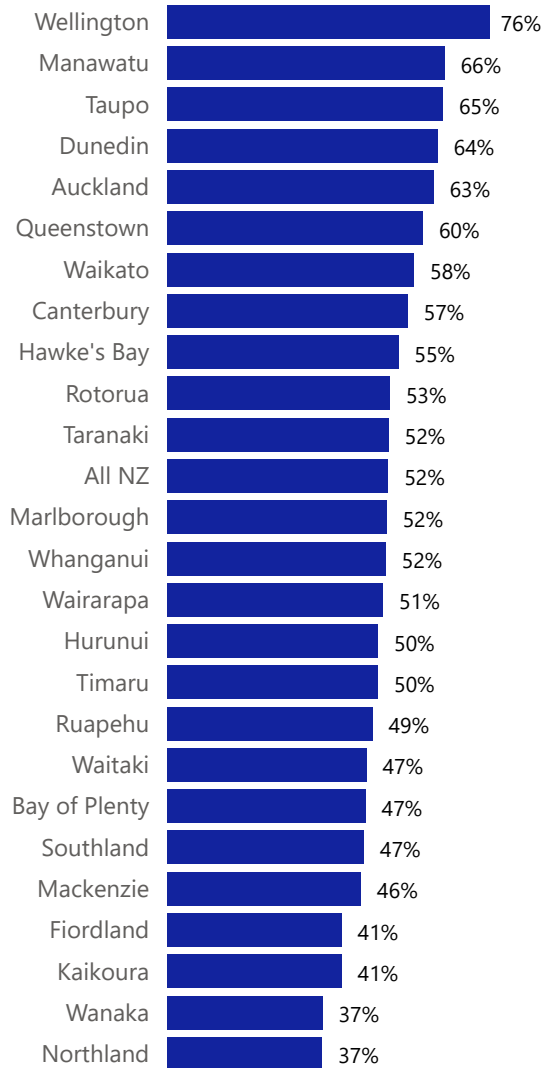
** MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month last year

Guest Arrival: Unique number guests arriving | **Guest Night:** 1 Night stayed by 1 guest, so 2 guests staying 3 nights = 6 guest nights | All data points represent the sum total or average for the month period ending in the stated date

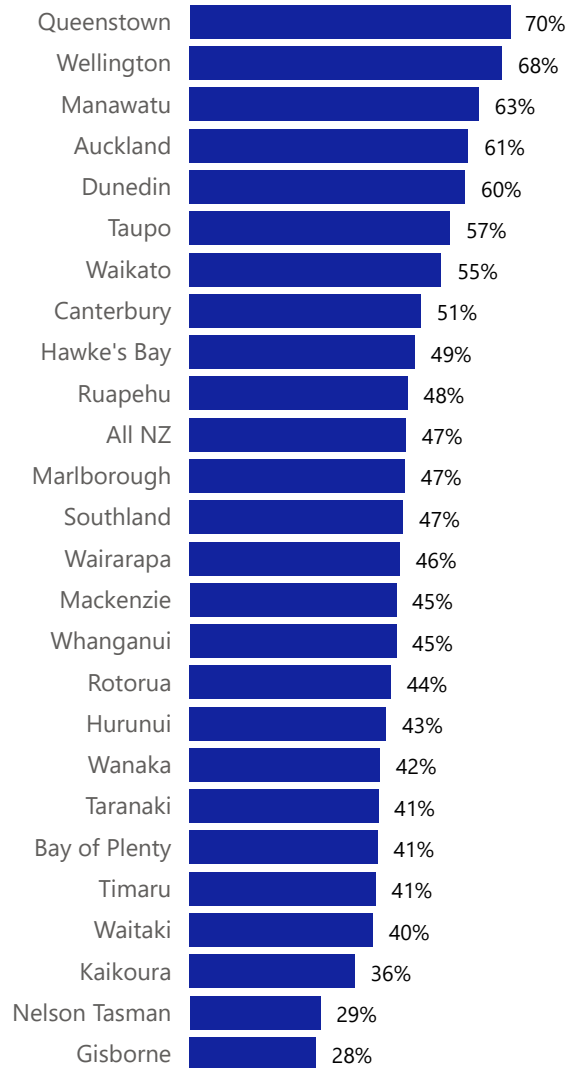
ADP Results - RTO Comparison - Month Ending 31 Oct'22



ADP Total Occupancy by RTO for the Month Ending 31 Oct'22



ADP Total Occupancy by RTO for the Month Ending 30 Sept '22

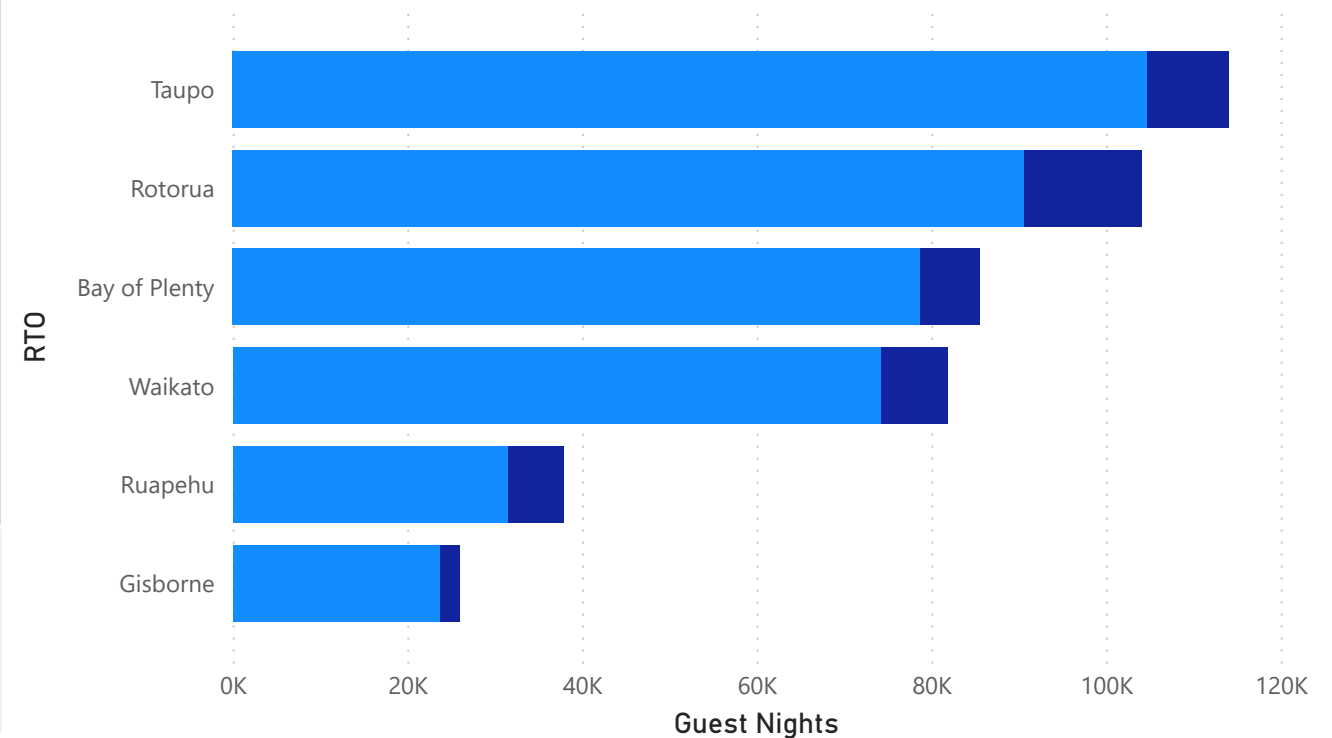


ADP Key Stats by CNI RTO for the Month Ending 31 Oct '22

Measure	Bay of Plenty	Gisborne	Rotorua	Ruapehu	Taupo	Waikato
Average nights stayed per guest	2.40	2.10	2.10	2.10	1.90	1.80
Guest arrivals	35,800.00	12,500.00	48,600.00	17,800.00	59,900.00	44,400.00
Occupancy rate	0.35	0.25	0.42	0.42	0.59	0.51
Proportion of international guests	0.08	0.08	0.13	0.17	0.08	0.09
Total guest nights	85,600.00	26,000.00	104,100.00	38,000.00	113,900.00	81,800.00

ADP Guest Nights by CNI RTO for the Month Ending 31 Oct '22

Measure ● Domestic guest nights ● International guest nights



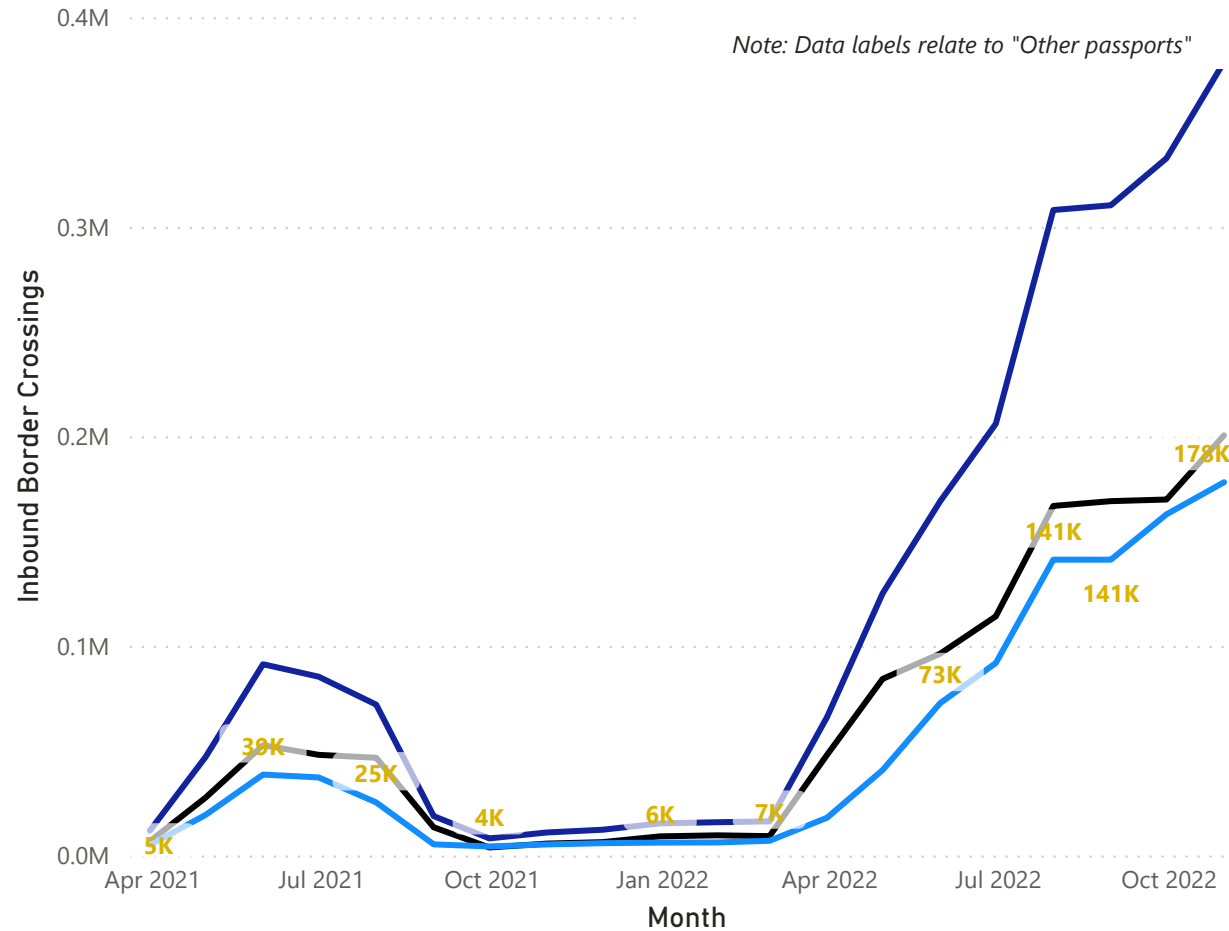
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2/03/2021 31/10/2022 Drag slider to focus date range

Monthly Border Entries by Passport Type

Traveller Type ● New Zealand passport ● Other passports ● Total



Monthly Border Entries by Port of Arrival

Port of Arrival ● Auckland ● Christchurch ● Other ports ● Queenstown ● Wellington

