

February Destination Insights Report

Prepared for Destination Great Lake Taupo

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AIC Monthly RTO Insight Report

About this 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.

About the data sets:

- **DataVentures:** Daily visitation data based on the number of cellular mobile devices turned on and transmitting at midday.
- **Tourism Electronic Card Transactions (TECT):** A data set provided by MBIE which tracks visitor spend made with credit/debit cards. Note that the data only captures spend made in region and does not include either cash or online spend. Hence the dataset should be considered indicative of trends rather than representative of the whole picture. More information can be found at the MBIE website [here](#).
- **Accommodation Data Programme (ADP):** Also provided by MBIE, this provides monthly commercial accommodation performance data based on survey data submitted by participating accommodation operators. Due to this limitation the coverage can be different for each area / accommodation type and some numbers may not be published to protect confidentiality of submitters. More information can be found at the MBIE website [here](#).
- **Business Events Data (BED):** Published quarterly this data is based upon a survey of participating business events venues. More information can be found at the BED Programme website [here](#).
- **Border Crossing Data:** Collected by Immigration New Zealand and Published by StatsNZ, this 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):** Change in a data point from the equivalent figure last month. E.g. if the visitor spend in January was \$100 and in February is \$125, the MoM change is 25%.
- **Year on Year (YoY):** Similar to MoM but compared to the previous year. Note: That this is not necessarily comparing a year of data rather change over a 12 months period. E.g. YoY change in the April guest nights figure would be comparing April this year to April last year.
- **Visitor Day:** 1 day spent by 1 visitor in a destination. So 1 visitor, present in the destination at 12 noon for 4 days would equate to $1 \times 4 = 4$ visitor days. So 3 visitors, present in the destination at 12 noon for 2 days would equate to $3 \times 2 = 6$ visitor days.
- **Year Ending (YE):** The sum of the 12 months ending in the date specified. So the event count for the year ending June 2023 would be the sum of all events held between July 2022 – June 2023.
- **Market share:** All market shares are presented as the market share for the associated RTO. This is the figure for the RTO / the total national figure. E.g. and RTO with 10k visitors, if the national visitor count was 100k would have a market share of 10%.
- **Visitor Spend:** Defined in this case as the total amount spent by visitors using credit / debit cards in the region.
- **ANZIC Product Category:** Product types based on the Australia and New Zealand Industrial Classification. For the sake of the spend statistics 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 the surveyed accommodation units e.g. two guests staying 3 nights would generate 2 guest arrivals.
- **Commercial Accommodation Guest Night (GN):** The number of guest nights stayed in the surveyed accommodation units e.g. two guests staying 3 nights would generate 6 guest nights.
- **Commercial Accommodation Occupancy / Occupancy Rate (OR):** Stay unit nights occupied divided by available monthly stay unit capacity.
- **Stay Units:** Daily capacity in terms 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 to be occupied by short-term guests. This excludes stay units temporarily removed from the inventory due to closures, maintenance, emergency housing etc.

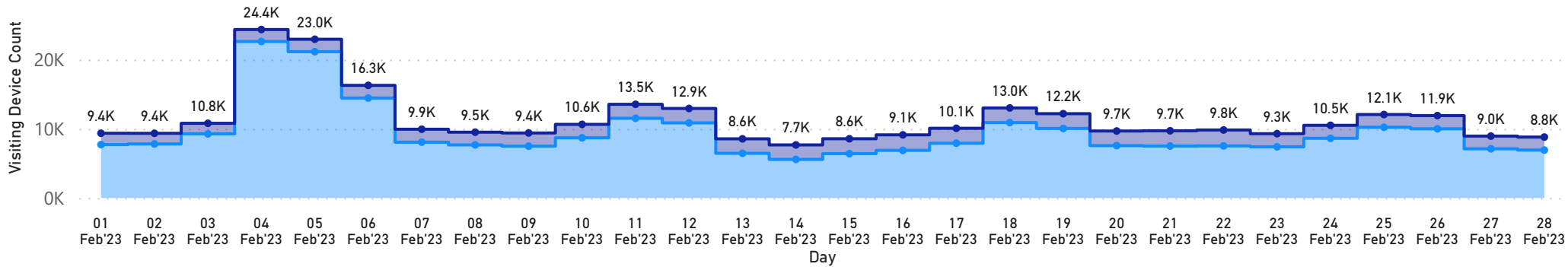


Select RTO ▼
 ▼

| | | | | | | |
|---|-------------------------------------|---------------------------------------|---|--|------------------------------|---------------------------------|
| 319.1K Total Visitor Days (Month) | 2.0% Market Share – Visitor Days | ▼ -35.8% Visitor Days - MoM Change | ▼ -30.8% Visitor Days - National MoM | 11.4K Daily Average (Latest Month) | 24357 Max Daily Visitor # | 17.1% % International |
| 15 RTO Rank - Visitor Days | ▲22.0% Visitor Days - YoY Change | ▲43.8% Visitor Days - National YoY | | 7677 Min Daily Visitor # | | |

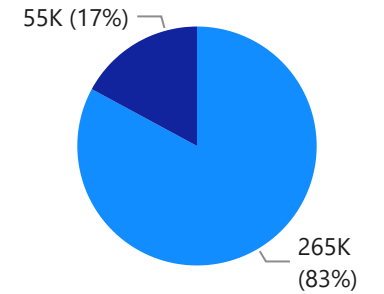
Daily Visitor Count (12 midday snapshot) - Feb'23 **NOTE: There was a data outage in the DV tool for 23/24 February. For reporting purposes the average of the equivalent weekdays has been used.**

● Domestic ● International



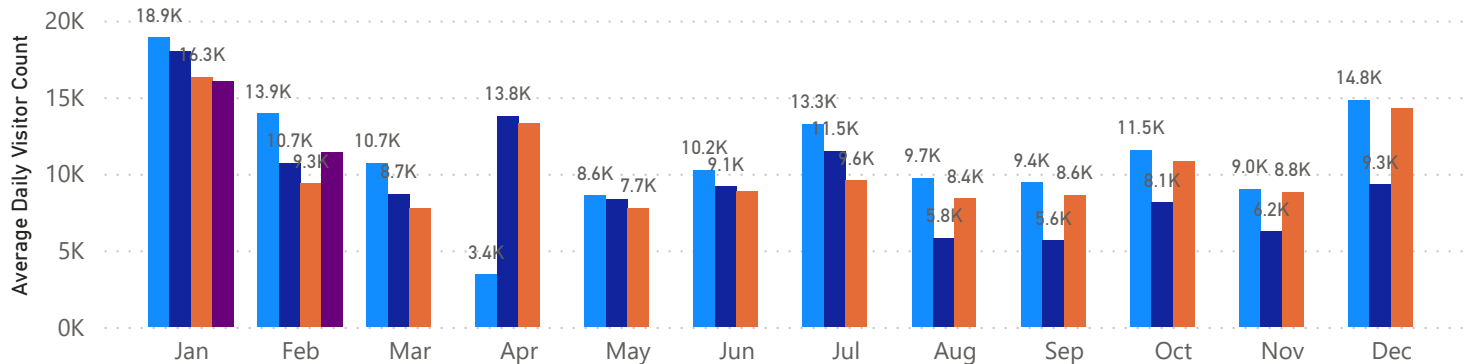
Total Visitor Days – Domestic vs. International

● Domestic ● International

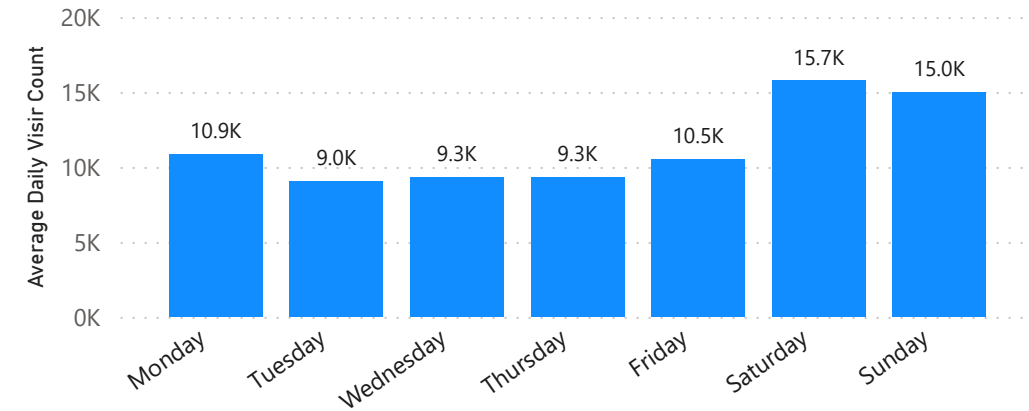


Average Daily Visitor Count by Month

Year ● 2020 ● 2021 ● 2022 ● 2023



Average Daily Visitor Count for Feb'23 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

TECT Domestic Visitor Spend - Taupo - Month Ending 28 Feb'23



Select RTO ▼
 ▼

\$24.5M
Spend - Latest Month

3.0%
Latest month market share


9
Rank spend by RTO

▼ -41.9%
Spend - MoM Change

▼ -2.6%
Spend - YoY Change

▼ -26.0%
National Spend - MoM Change

▲2.7%
National Spend - YoY Change

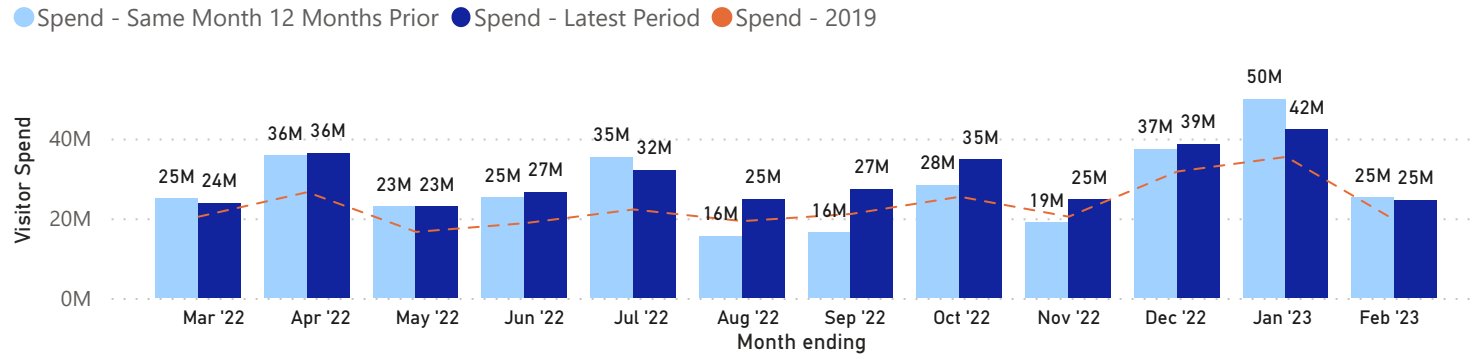


\$358.0M
Spend - Last 12 Month

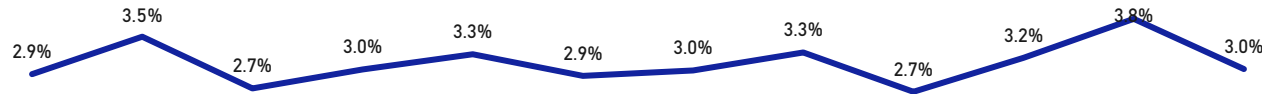
▲7%
Spend - Last 12 Months YoY

▲7.8%
National 12 Month YoY Change

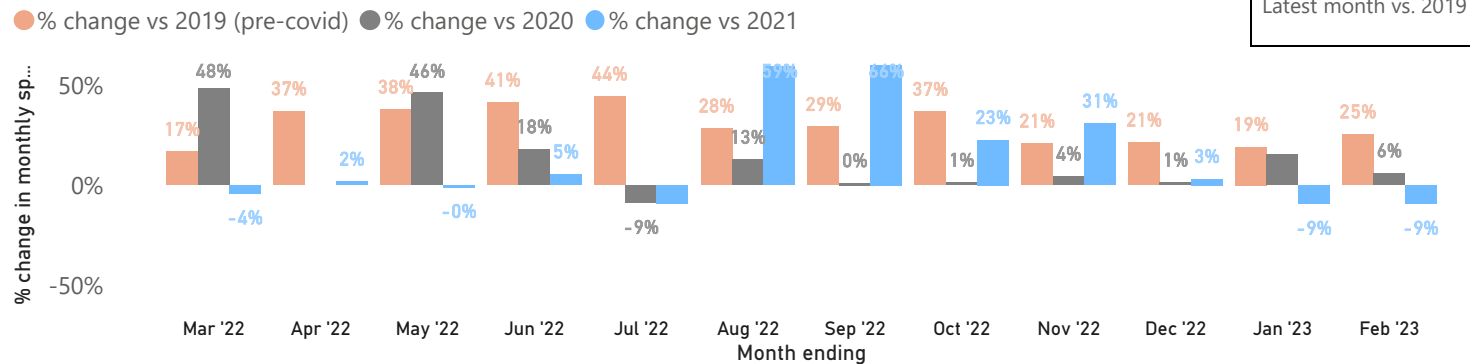
Captured Monthly Visiting Cardholder Spend (NZ \$)



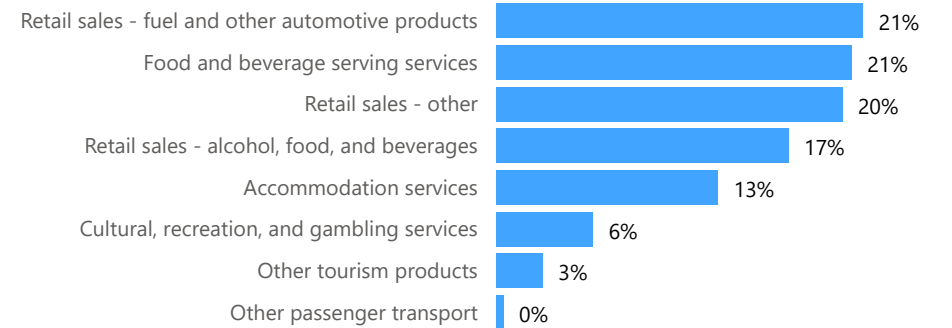
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

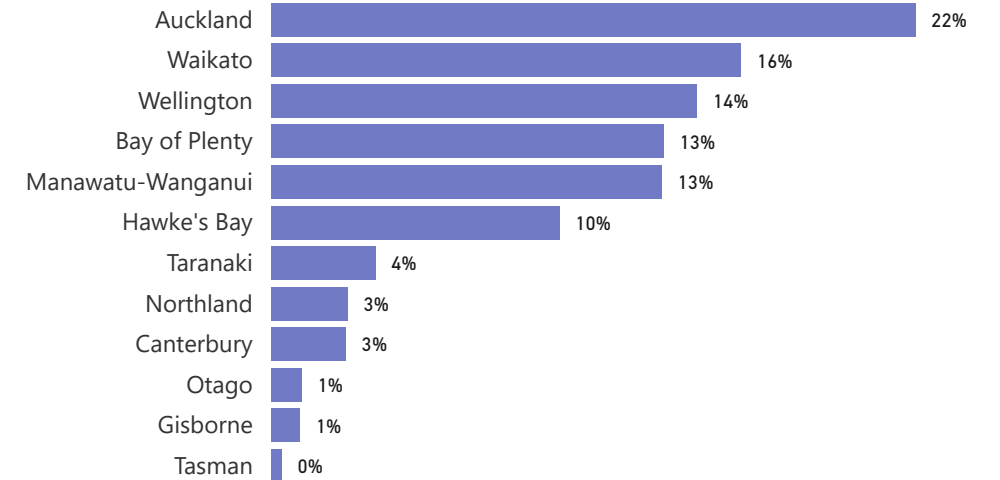


Last Month % TECT Visitor Spend by ANZSIC Product Category



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

\$9.2M Spend - Latest Month

2.3% Latest month market share

13 Rank spend by RTO

▼ -8.7% Spend - MoM Change

▲1289.8% Spend - YoY Change

▼ -9.4% National Spend - MoM Change

▲762.4% National Spend - YoY Change

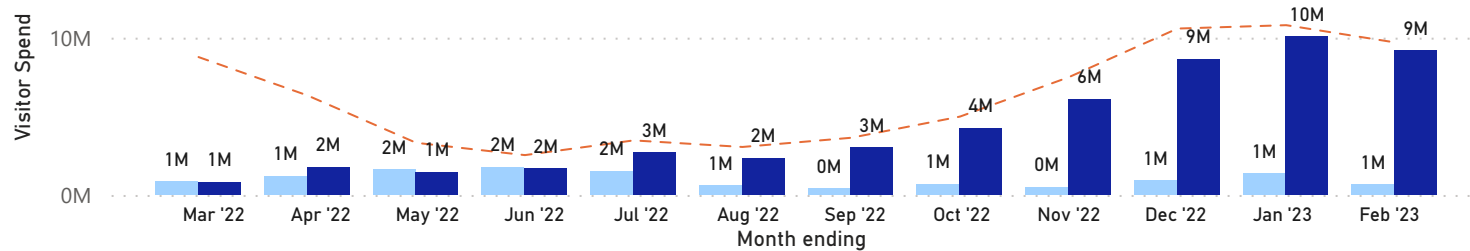
\$51.9M Spend - Last 12 Month

▲333% Spend - Last 12 Months YoY

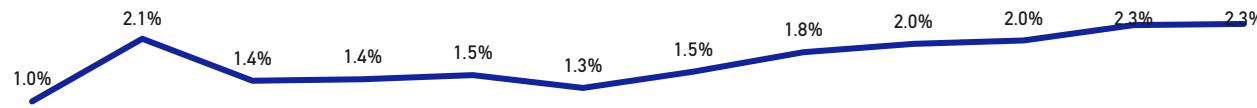
▲272.0% National 12 Month YoY Change

Captured Monthly Visiting Cardholder Spend (NZ \$)

● Spend - Same Month 12 Months Prior ● Spend - Latest Period ● Spend - 2019

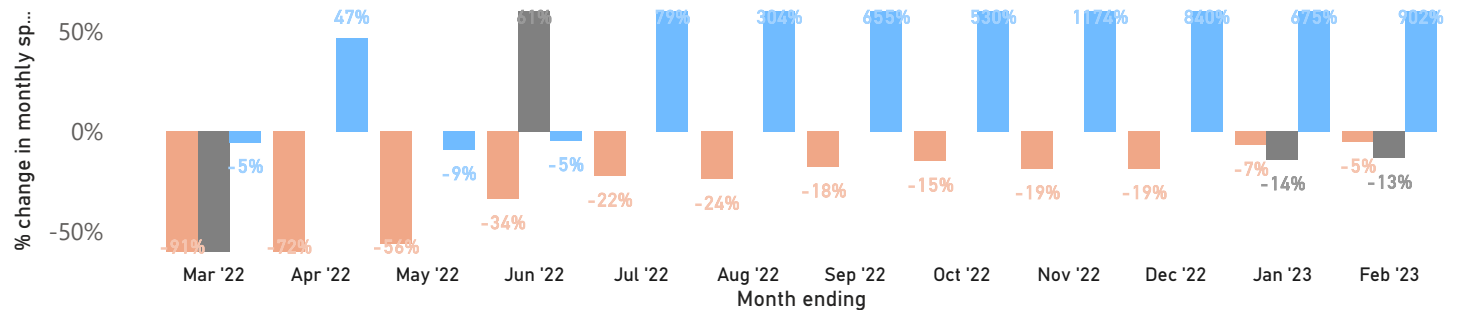


Market Share - Latest Period (%)

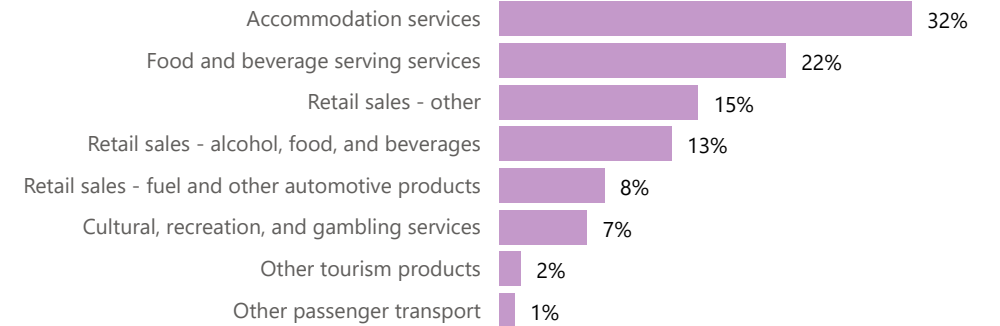


Change in Spend vs. the Same Month in Previous Years

● % change vs 2019 (pre-covid) ● % change vs 2020 ● % change vs 2021

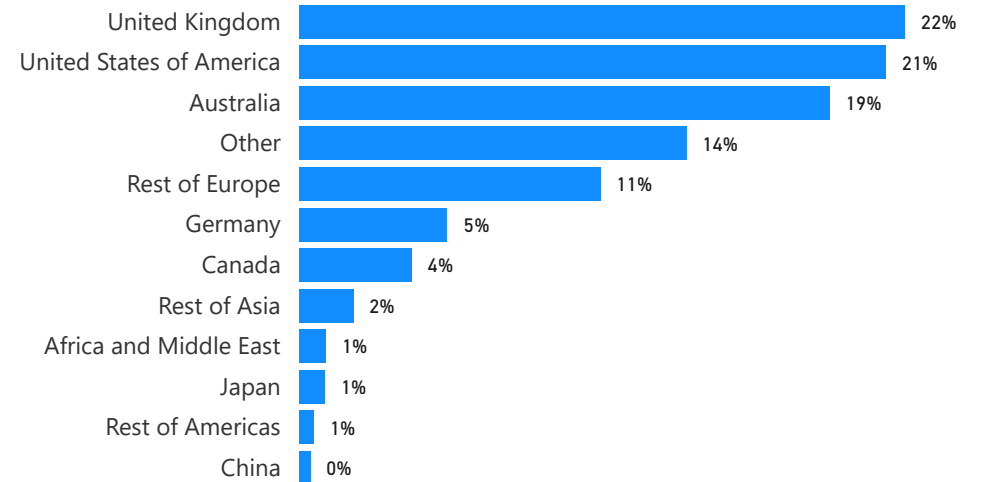


Last Month % TECT Visitor Spend by ANZSIC Product Category



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

TECT Visitor Spend - Taupo RTO - 12 Months Ending 28 Feb'23



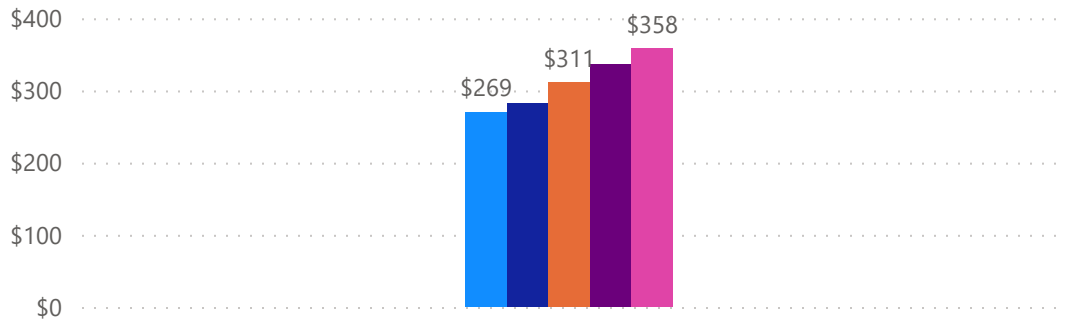
Select RTO ▼
 Taupo ▼

Total Domestic Spend (\$M) - YE Feb '23

\$358.0
 ▲ 6.8% YoY Change

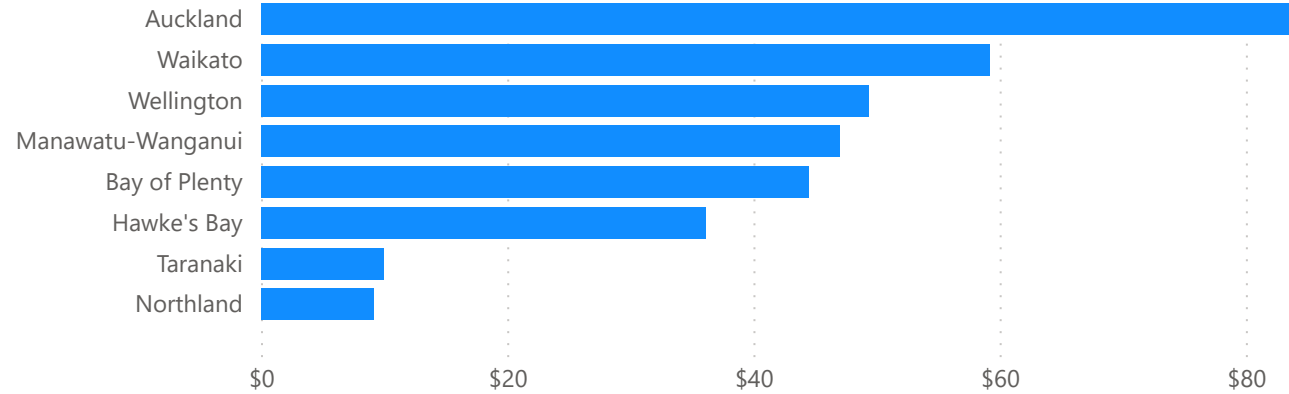
3.2% Market Share (12 Months)
 10 RTO Rank

12 Months Ending Feb ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



Domestic Visitor Spend by Region of Origin (\$M) - YE Feb '23

(Scroll down to see all regions)

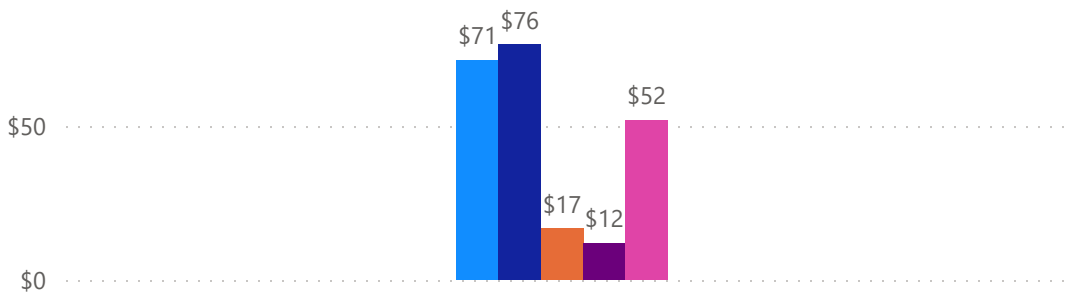


Total International Spend (\$M) - YE Feb '23

\$51.9
 ▲ 333.2% YoY Change

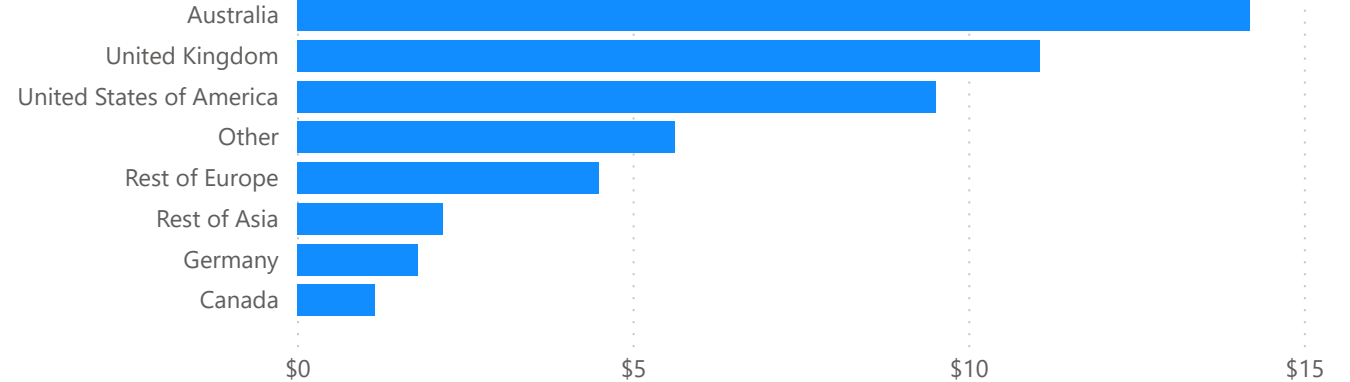
1.9% Market Share (12 Months)
 14 RTO Rank

12 Months Ending Feb ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



International Visitor Spend by Region of Origin (\$M) - YE Feb '23

(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.

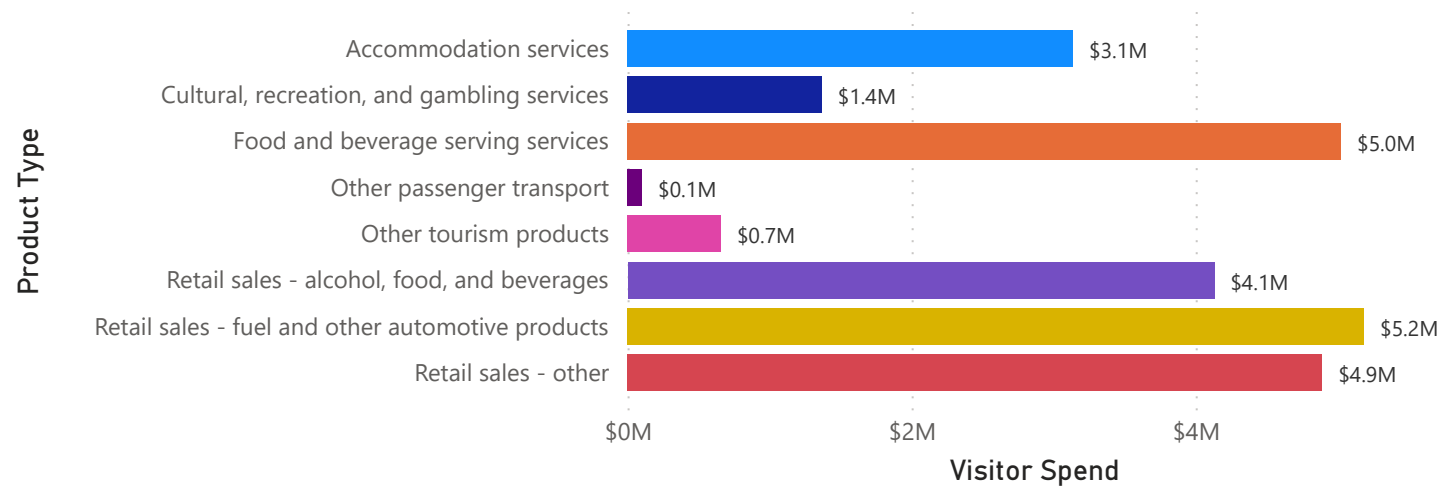
Definitions: MoM (Month on Month Change) - Compares reported month to previous month | YoY (Year on Year Change) - Compares reported month to same month of the previous year | YE (Year Ending) - Sum of the 12 months up to

TECT Domestic Visitor Spend By Product - Taupo - Month Ending 28 Feb'23



Select RTO ▼
 Taupo ▼

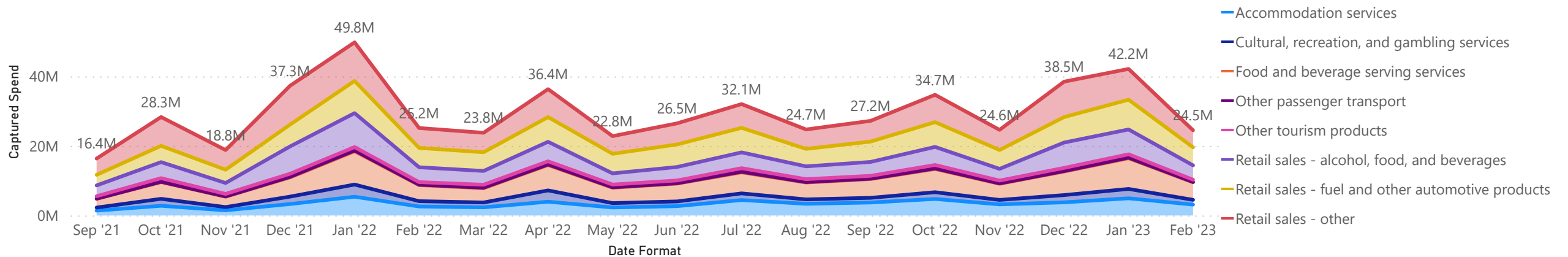
Visitor Spend By ANZSIC Product Category (NZ\$) - Feb'23



Change in Spend vs. Previous Periods

| Product | MoM | YoY | YoY 2019 |
|---|----------|----------|----------|
| Accommodation services | ▼ -36.5% | ▲20.9% | ▼ -0.6% |
| Cultural, recreation, and gambling services | ▼ -49.3% | ▼ -10.5% | ▲28.9% |
| Food and beverage serving services | ▼ -43.0% | ▲8.9% | ▲34.0% |
| Other passenger transport | ▼ -42.9% | ▼ -14.9% | ▼ -43.1% |
| Other tourism products | ▼ -31.8% | ▼ -11.3% | ▼ -4.1% |
| Retail sales - alcohol, food, and beverages | ▼ -42.1% | ▼ -3.3% | ▲30.3% |
| Retail sales - fuel and other automotive products | ▼ -39.4% | ▼ -6.9% | ▲48.2% |
| Retail sales - other | ▼ -44.7% | ▼ -14.5% | ▲21.4% |
| Total | ▼ -41.9% | ▼ -2.6% | ▲25.4% |

Visitor Spend by ANZSIC Product Category (NZ\$)



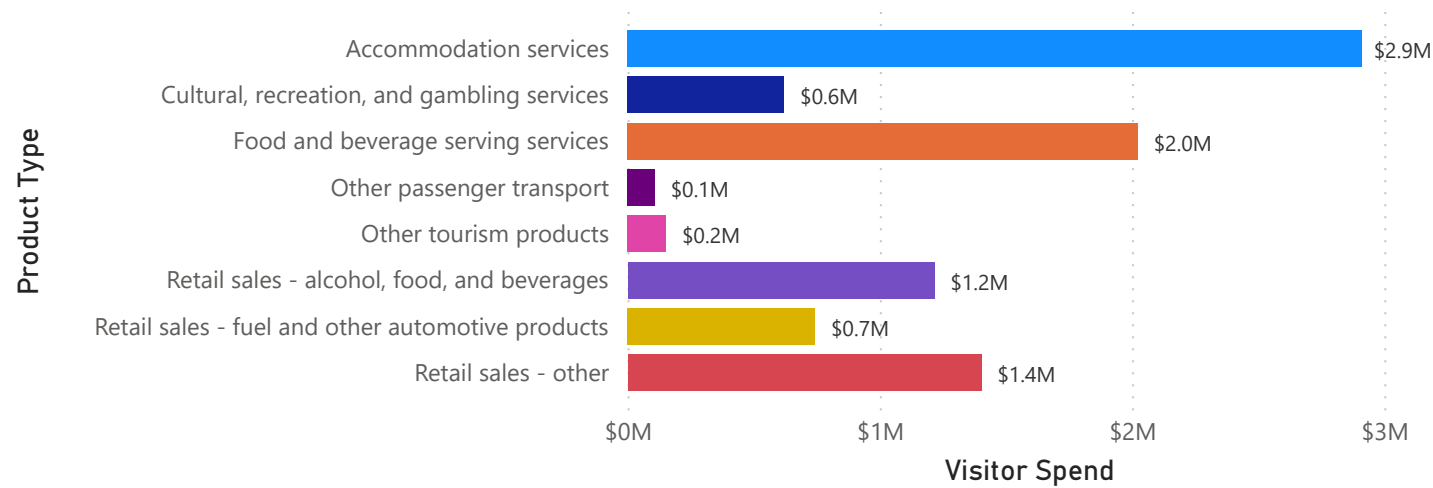
Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions:** MoM (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 International Visitor Spend By Product - Taupo - Month Ending 28 Feb'23



Select RTO ▼
 Taupo ▼

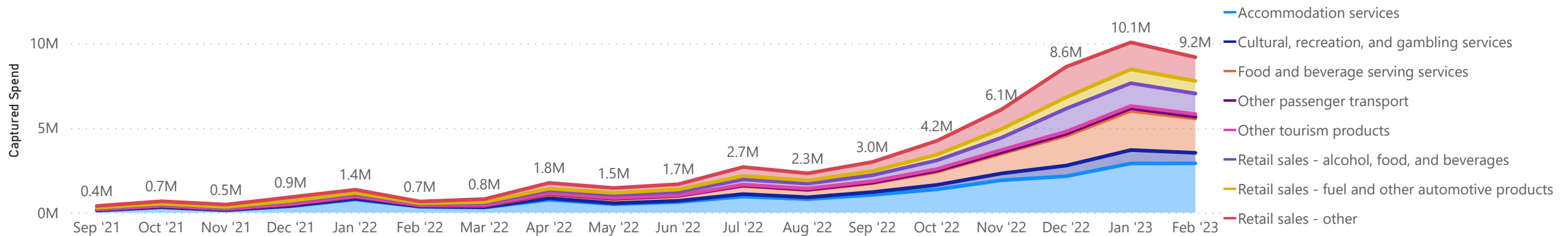
Visitor Spend By ANZSIC Product Category (NZ\$) - Feb'23



Change in Spend vs. Previous Periods

| Product | MoM | YoY | YoY 2019 |
|---|---------------|-----------------|---------------|
| Accommodation services | ▲0.2% | ▲734.1% | ▼-18.8% |
| Cultural, recreation, and gambling services | ▼-21.6% | ▲3532.9% | ▼-42.2% |
| Food and beverage serving services | ▼-12.5% | ▲3812.0% | ▲36.7% |
| Other passenger transport | ▼-31.0% | ▲2779.9% | ▼-74.7% |
| Other tourism products | ▲15.9% | ▲904.4% | ▲8.7% |
| Retail sales - alcohol, food, and beverages | ▼-9.8% | ▲1431.5% | ▲17.8% |
| Retail sales - fuel and other automotive products | ▼-8.8% | ▲2118.2% | ▲3.5% |
| Retail sales - other | ▼-12.0% | ▲1169.2% | ▲12.0% |
| Total | ▼-8.7% | ▲1289.8% | ▼-5.4% |

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



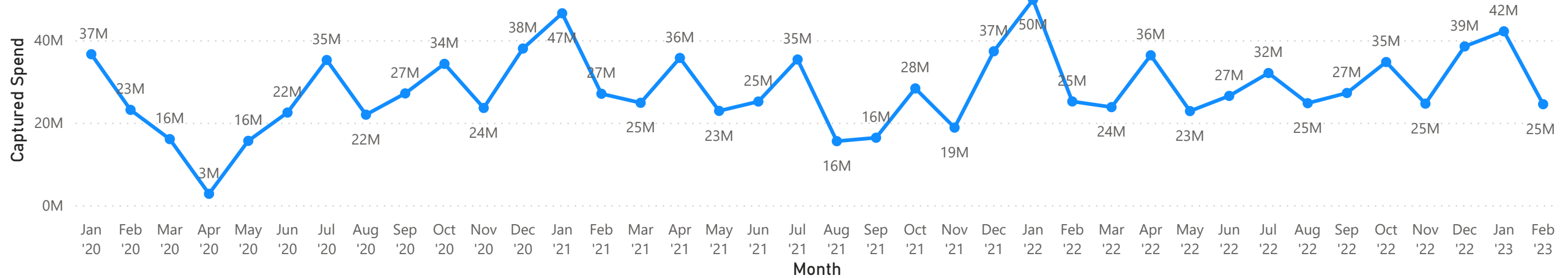
Select RTO ▼
Taupo ▼

22/01/2020 28/02/2023

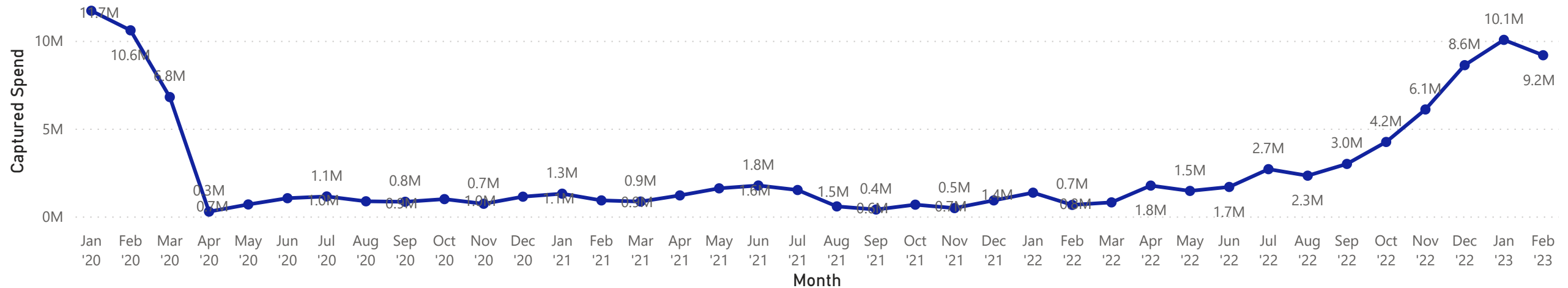
Drag slider to focus date range



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

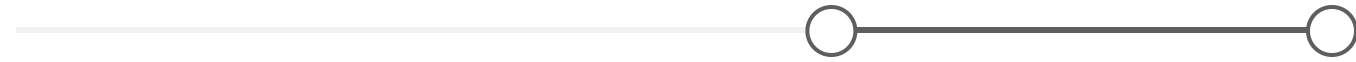


Select RTO
Taupo

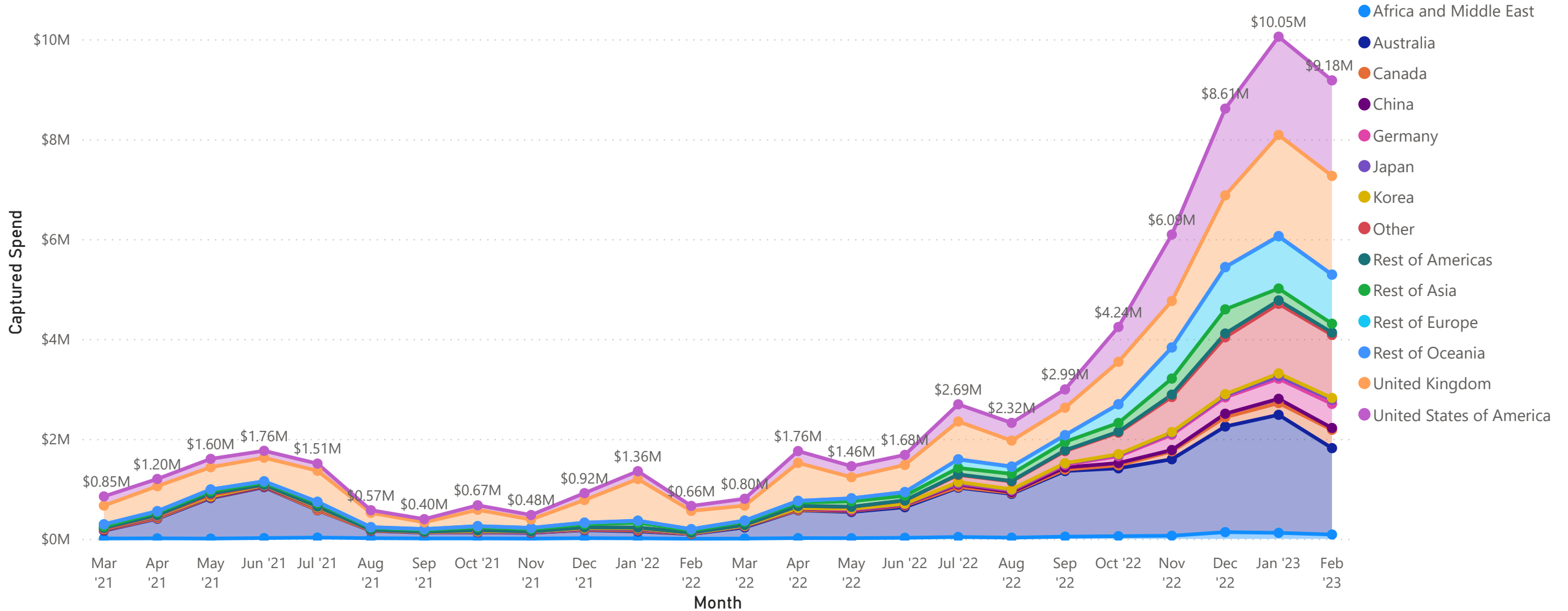
Select Visitor Origin
All

22/03/2021 28/02/2023

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.



Select RTO
Taupo

▼ -41.9% MoM
▼ -2.6% YoY


3.0% Share
9 RTO Rank

▼ -26.0% National MoM
▲ 2.7% National YoY

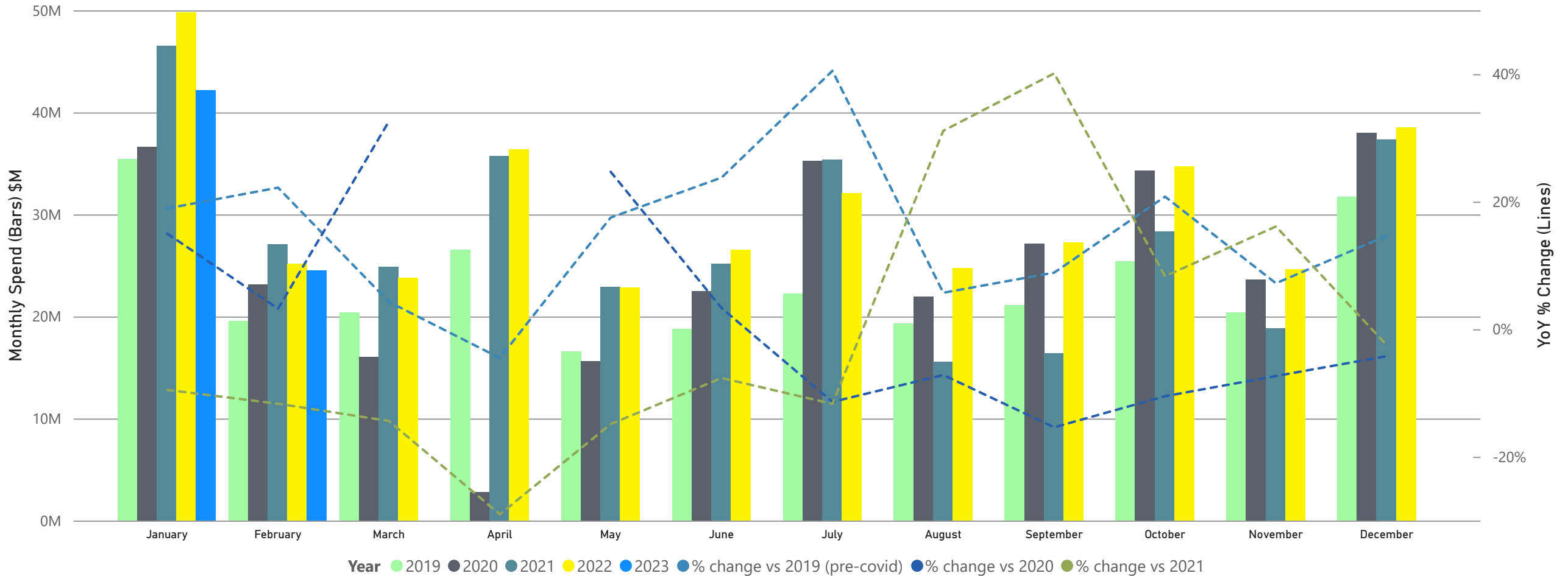
▲ 7% YoY
▲ 7.8% National YoY

\$24.5M Spend - Latest Month

\$358.0M 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

ADP RTO Summary - Taupo - Month Ending 28 Feb'23



Select RTO
Taupo

Select Property Type
All

66.2K
Guest Arrivals (GA)
▼ -20.0% GA MoM Change
▲ 58.0% GA YoY Change

124.4K
Guest Nights (GN)
3.5% GN Market Share
10 GN Rank by RTO

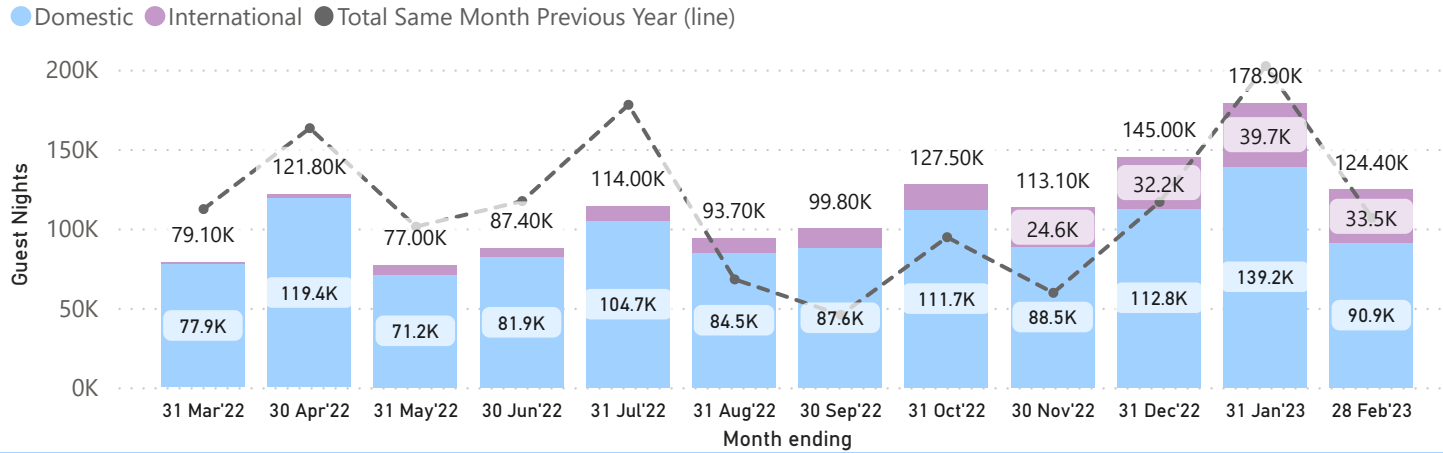
▼ -30.5% GN MoM Change
▲ 58.7% GN YoY Change

▼ -26.5% GN - National - MoM
▲ 97.2% GN - National - YoY

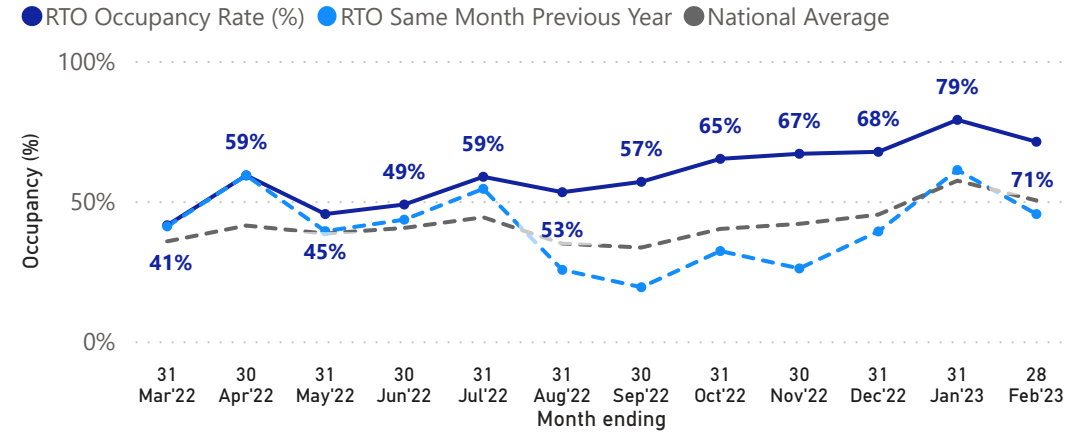


71.2%
Occupancy Rate (OR)
▼ -9.9% OR - MoM Change
▲ 56.8% OR - YoY Change

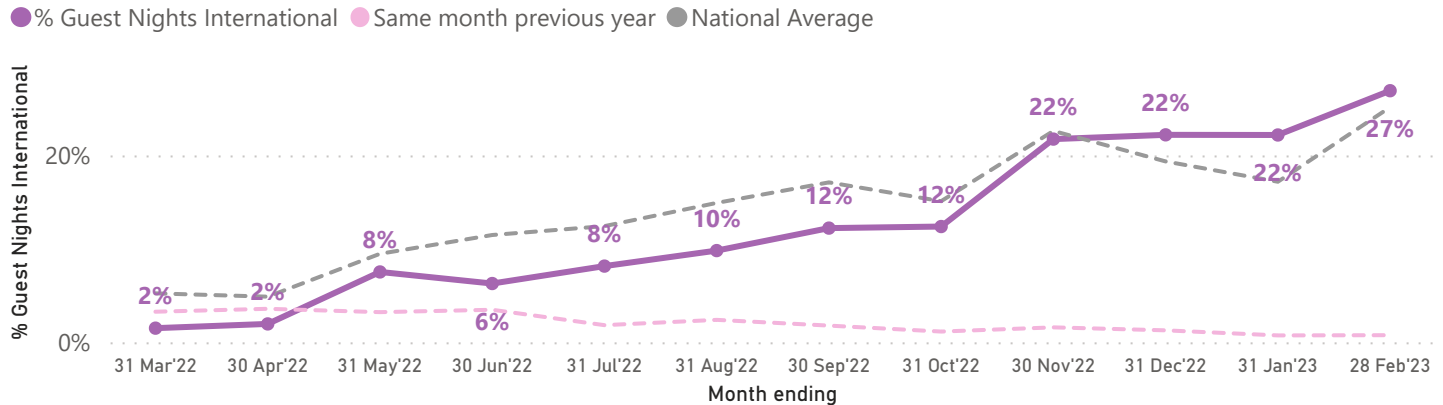
Total Guest Nights by Month



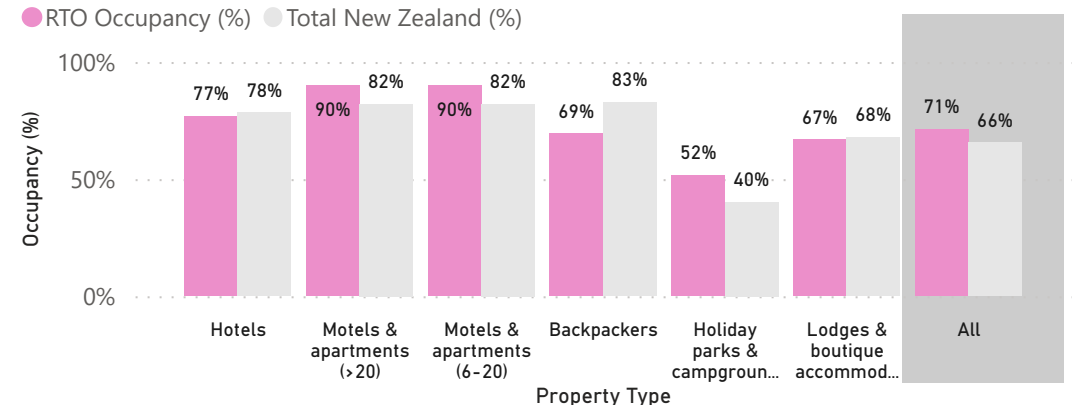
Occupancy Rate by Month



Proportion Guest Nights International



Monthly Average Occupancy by Property Type vs. National Average



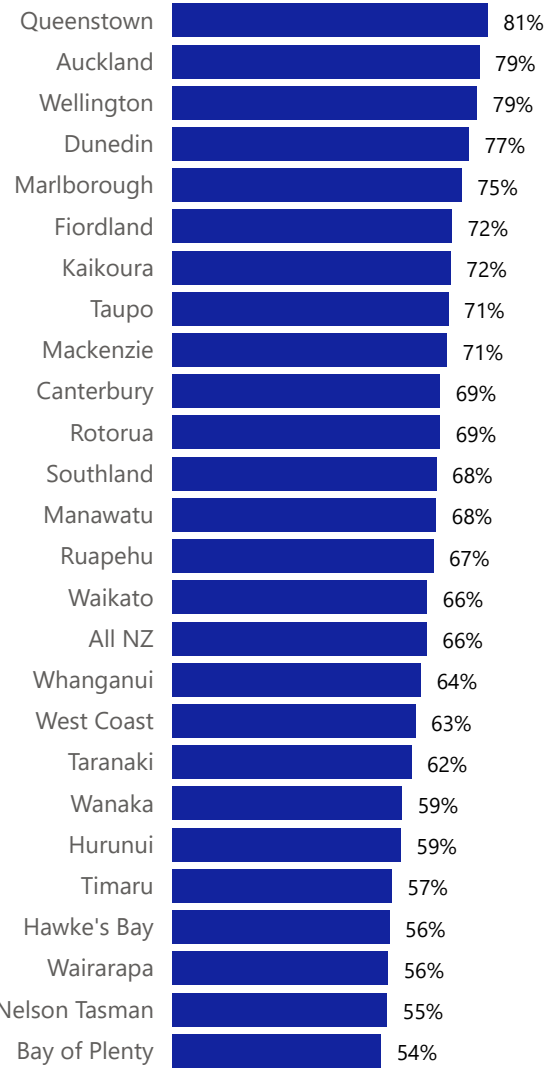
** MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month last year

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

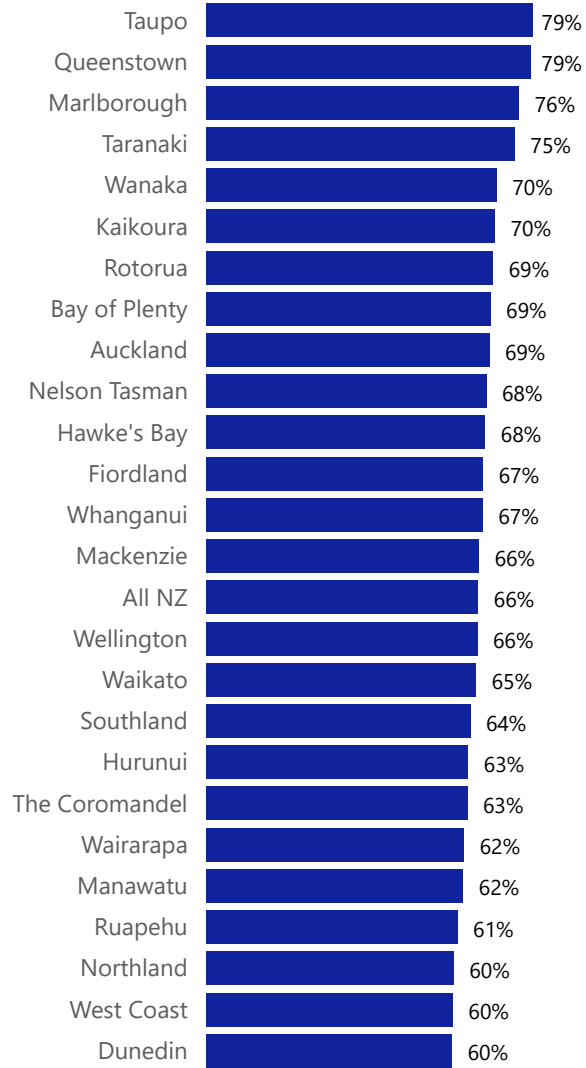
ADP Results - RTO Comparison - Month Ending 28 Feb'23



ADP Total Occupancy by RTO for the Month Ending 28 Feb' 23



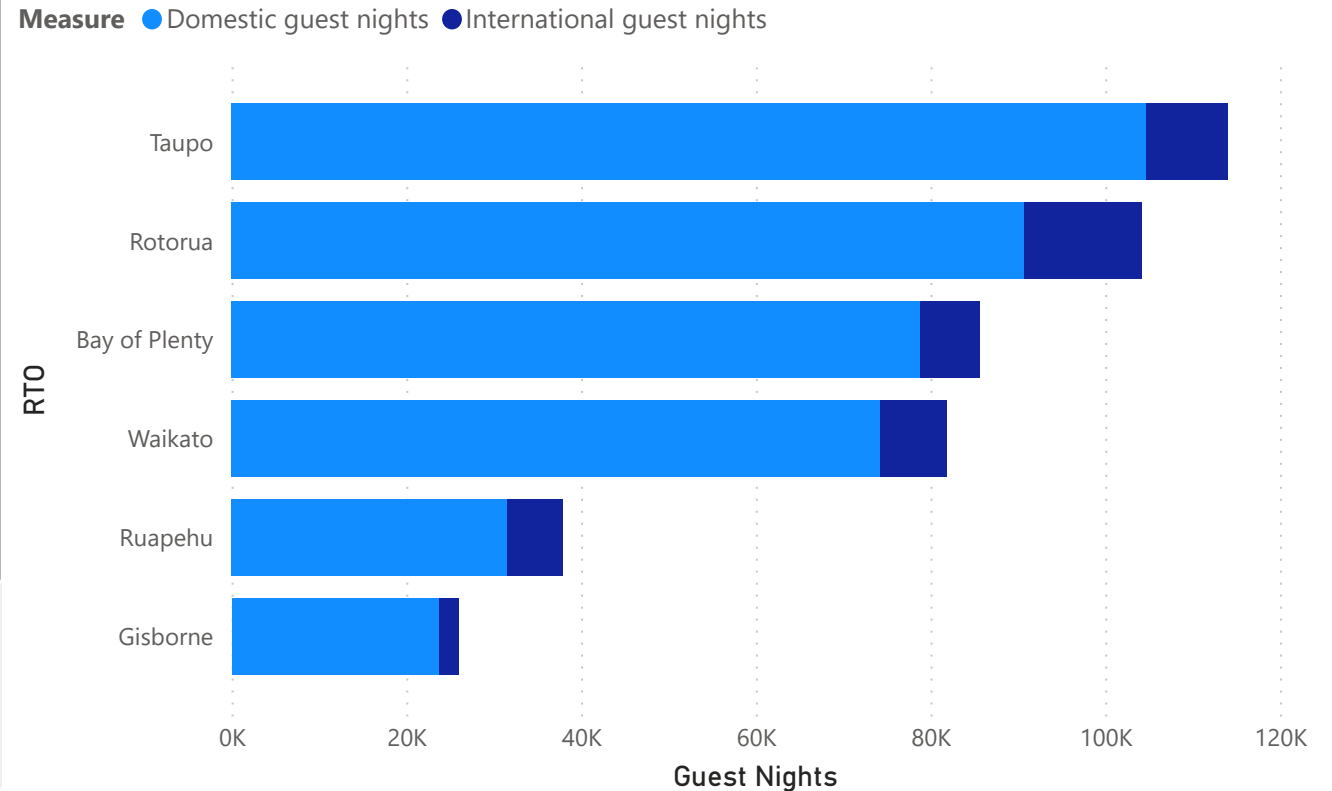
ADP Total Occupancy by RTO for the Month Ending 31 Jan '23



ADP Key Stats by CNI RTO for the Month Ending 28 Feb '23

| 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 28 Feb '23



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24.7K
Booked Nights

▼ -11.2%
Booked Nights MoM

▲88.6%
Booked Nights YoY

1.5K
Active Listings

▲0.5%
Active Listings MoM

▲6.5%
Active Listings YoY

\$4.8M
Monthly Revenue

▼ -14.5%
Revenue MoM

▲102.8%
Revenue YoY

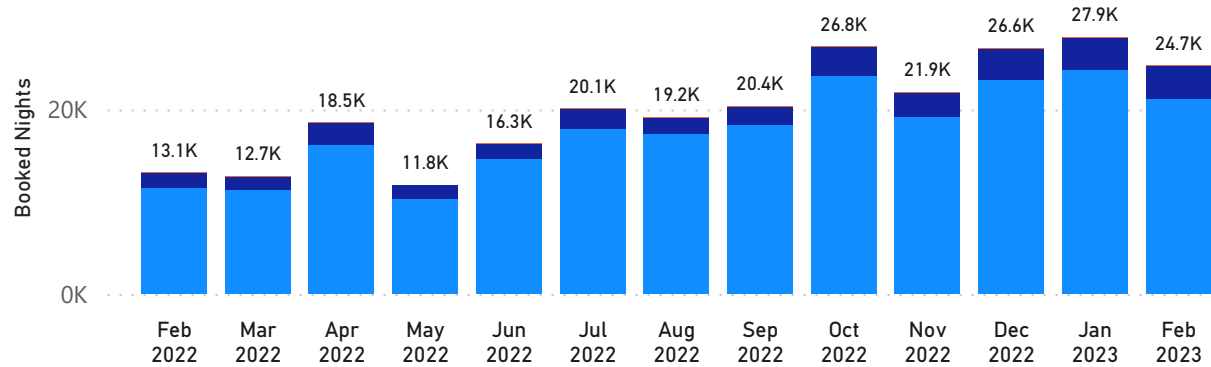
71%
Monthly Occupancy

▼ -9.7%
Occupancy MoM

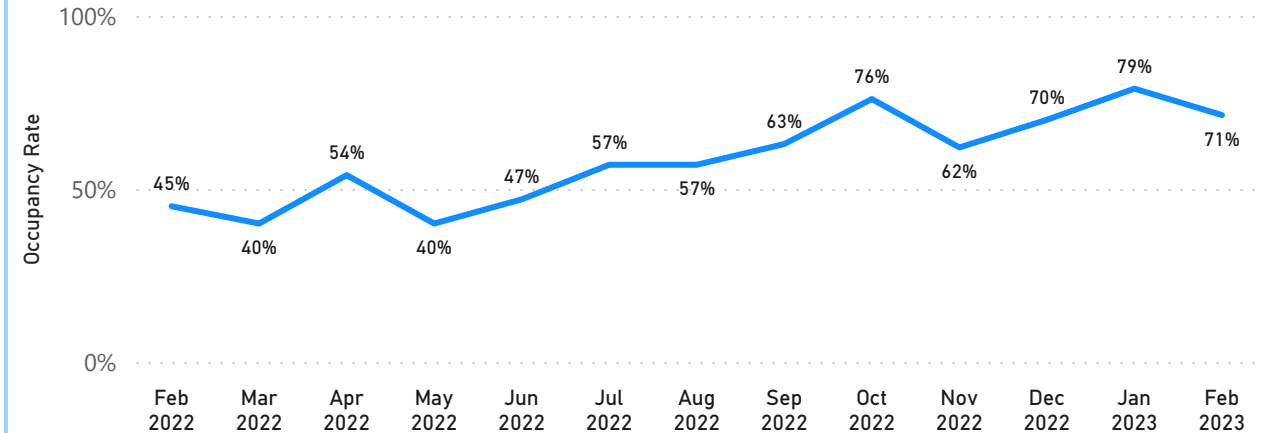
▲58.6%
Occupancy YoY

Monthly Demand (Booked Nights) by Listing Type

● Entire Place ● Private Room ● Shared Room

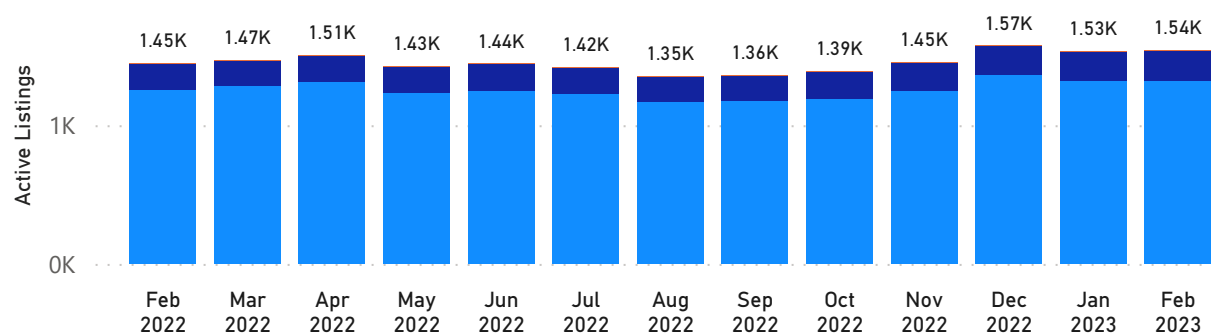


Monthly Occupancy Rate

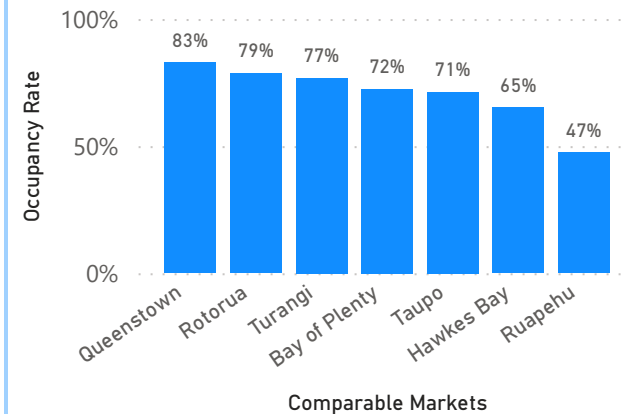


Monthly Active Listing Count by Type

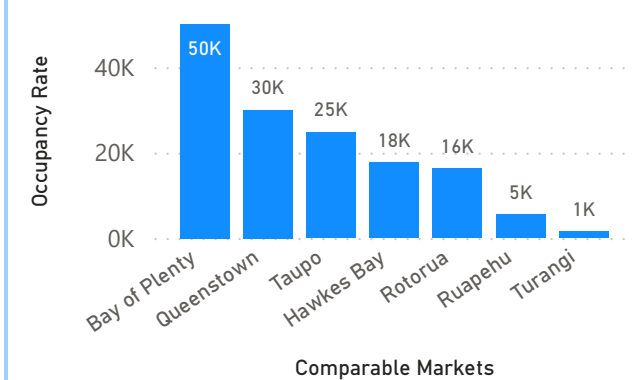
● Entire Place ● Private Room ● Shared Room



Occupancy vs. Sub-markets - Feb'23



Booked Nights vs. Sub-markets - Feb'23



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

Source: AirDNA Monthly Trend Reporting



| | | | |
|----------------------|-----------|------------------------------|-------------------|
| 447K | ▼ -13.1% | 297K | ▼ -2.6% |
| Total - Latest Month | Total MoM | International - Latest Month | International MoM |
| ▲2639% | Total YoY | ▲4114% | International YoY |

8/06/2020 28/02/2023

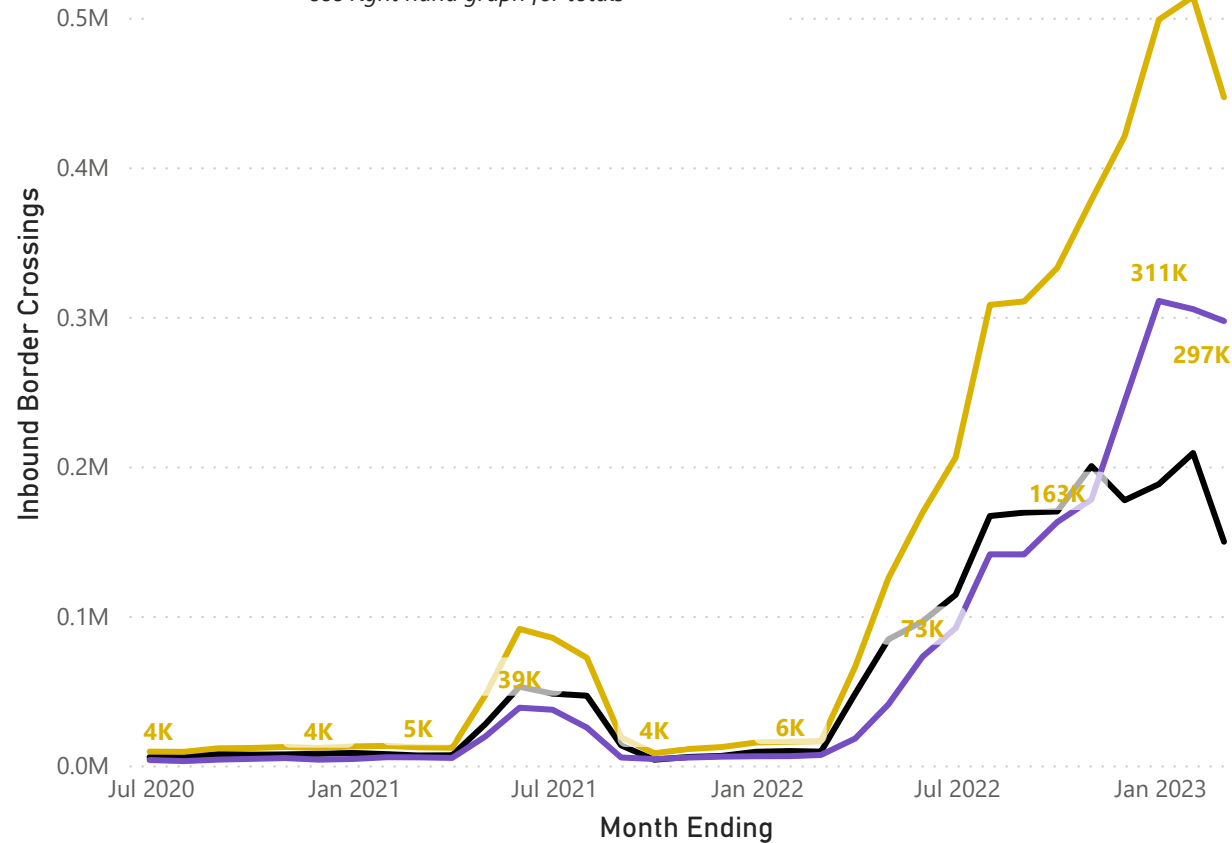
Drag slider to focus date range



Monthly Border Entries by Passport Type

Traveller Type ● New Zealand passport ● Other passports ● Total

Note: Data labels relate to "Other passports" - hover over or see right hand graph for totals



Monthly Border Entries by Port of Arrival

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

Note: Data labels relate to totals

