July '23 Destination Insights Report

Prepared for Destination Great Lake Taupo

About & Definitions

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Insights for the visitor economy

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 the region and does not include either cash or online spend. Hence the data set should be considered indicative of trends rather than representative of the whole picture. More information can be found on the MBIE website here.
- Accommodation Data Programme (ADP): A data set 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 Due to this limitation the coverage can be different for each area / accommodation type and some numbers may not be published to protect confidentiality of submitters.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 on 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 comparing a year of data, but the current month to the same month last year. E.g. YoY change in the April guest nights figure compares 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 x 4 = 4 visitor days. So 3 visitors, present in the destination at 12 noon for 2 days would equate to 3 x 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.

AIC Insights for the visitor economy

Data Ventures Visitation Data - Taupo - Month Ending 31 Jul'23



374K (94%)





397.9K Total Visitor Days (Month) 2.1% Market Share – Visitor Days RTO Rank - Visitor Davs

Day

▲27.3% Visitor Days - MoM Change **▲**34.4% Visitor Days - YoY Change

▲17.4% Visitor Davs - National MoM **▲**37.6% Visitor Days - National YoY

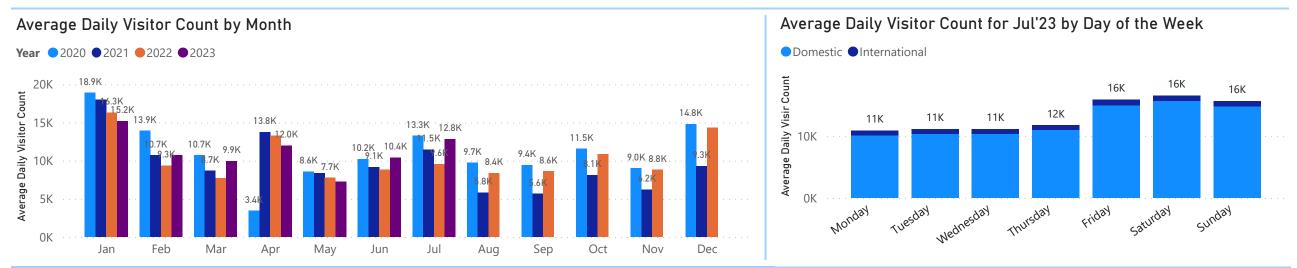
13.3K Daily Average (Latest Month) Max Daily Visitor # 6.1% % International

25071

8625

Min Daily Visitor #

Daily Visitor Count (12 midday snapshot) - Jul'23 Total Visitor Days - Domestic vs. International Domestic International DomesticInternational **Visiting Device Count** 24K (6%) — 0K



^{**} MoM (Month on Month Change) - Compares reported month to previous month | **YOY (Year on Year Change) - Compares reported 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

AIC

Domestic Visitation Data - Taupo - Month Ending 31 Jul'23







373.6K Total Visitor Days (Month) Market Share – Visitor Davs

2.0%

▲25.1% Visitor Days - MoM Change **▲**33.1%

Visitor Days - YoY Change

12.5K

Daily Average (Latest Month)

24033

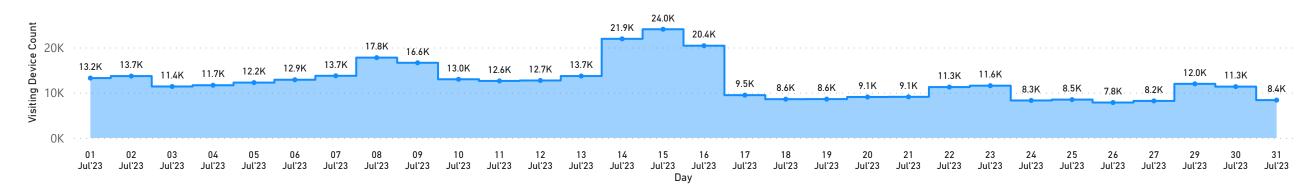
Max Daily Visitor #

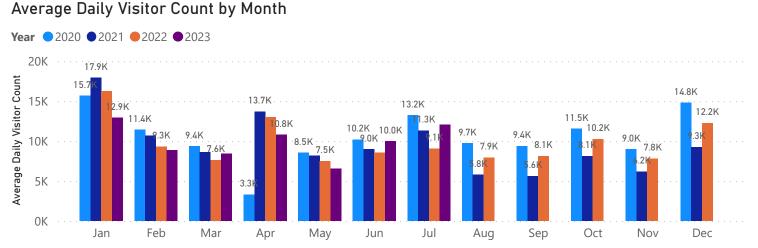
7833

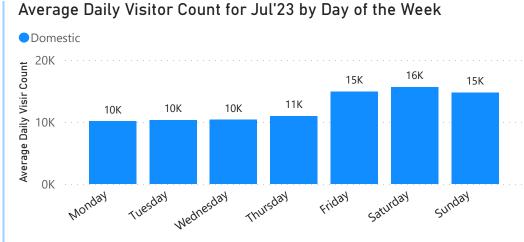
Min Daily Visitor #

Daily Visitor Count (12 midday snapshot) - Jul'23







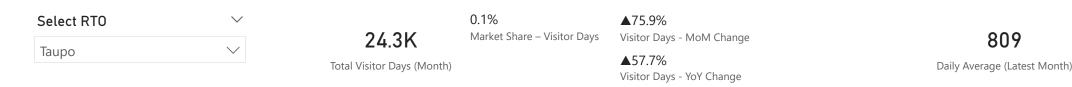


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International Visitation Data - Taupo - Month Ending 31 Jul'23



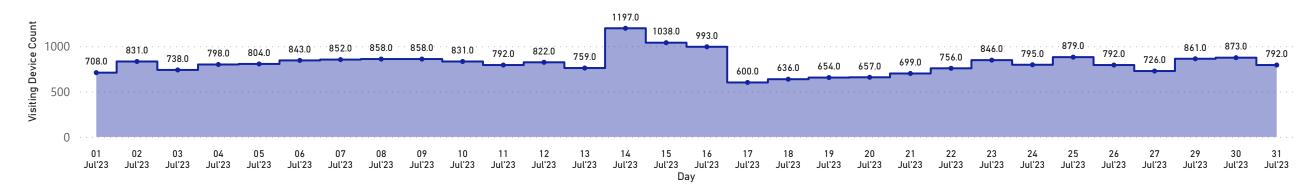


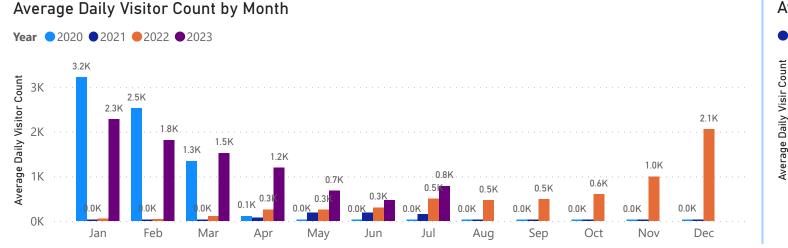
1197 Max Daily Visitor #

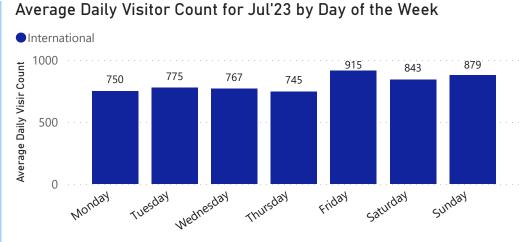
Min Daily Visitor #

Daily Visitor Count (12 midday snapshot) - Jul'23

International





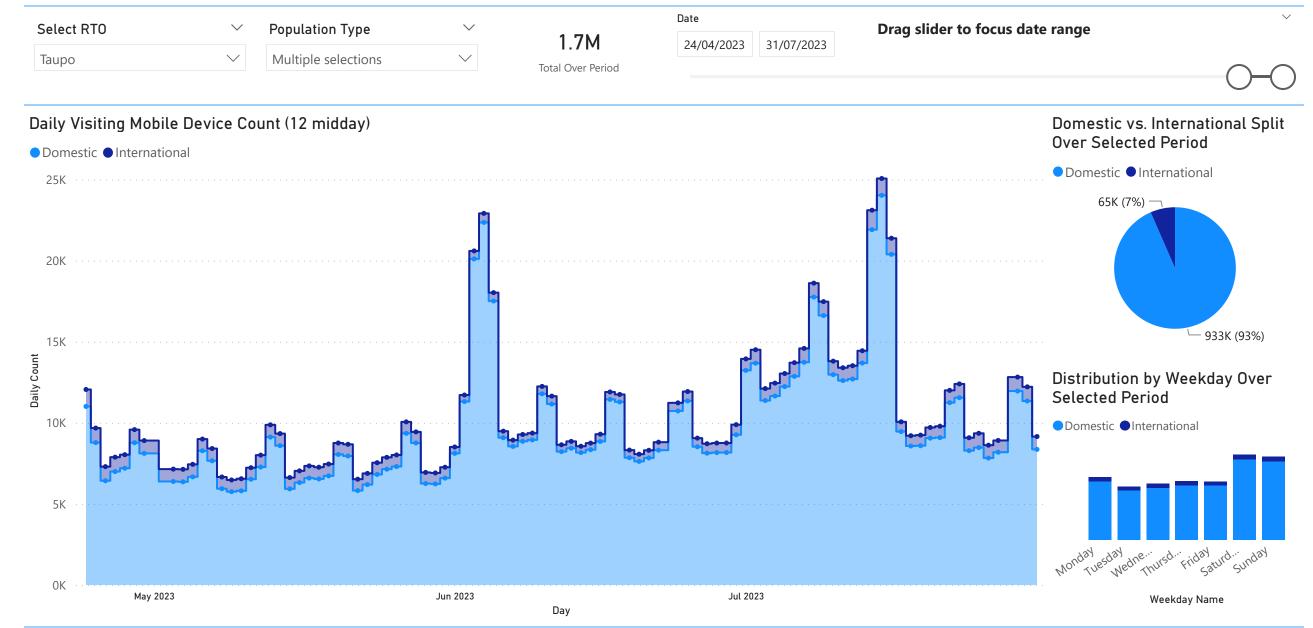


^{**} **MoM** (Month on Month Change) - Compares reported month to previous month | ****YoY** (Year on Year Change) - Compares reported month to same month last year | ****YE** (Year Ending) - Sum of the 12 months ending **Visitor Day:** 1 day spent by 1 visitor in the destination. So 1 person staying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

AIC Insights for the visitor economy

Visitation Data (Data Ventures) - Taupo - Long Term View





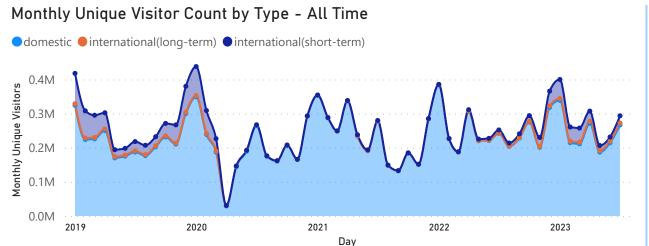
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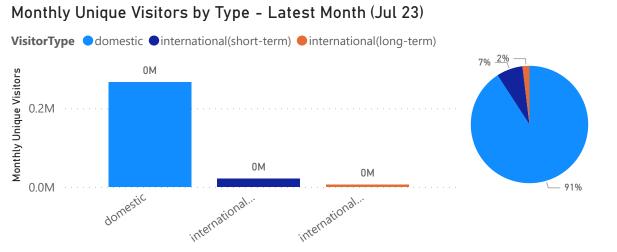


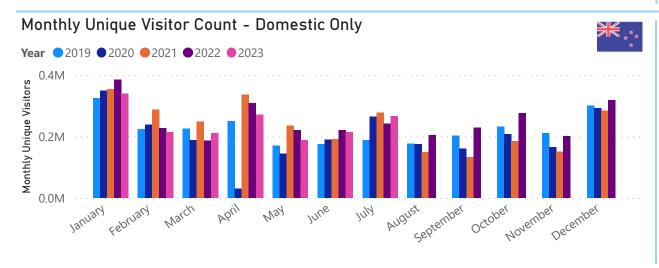
Monthly Unique Visitor Estimates (MURPEs) - Taupo - Jul'23









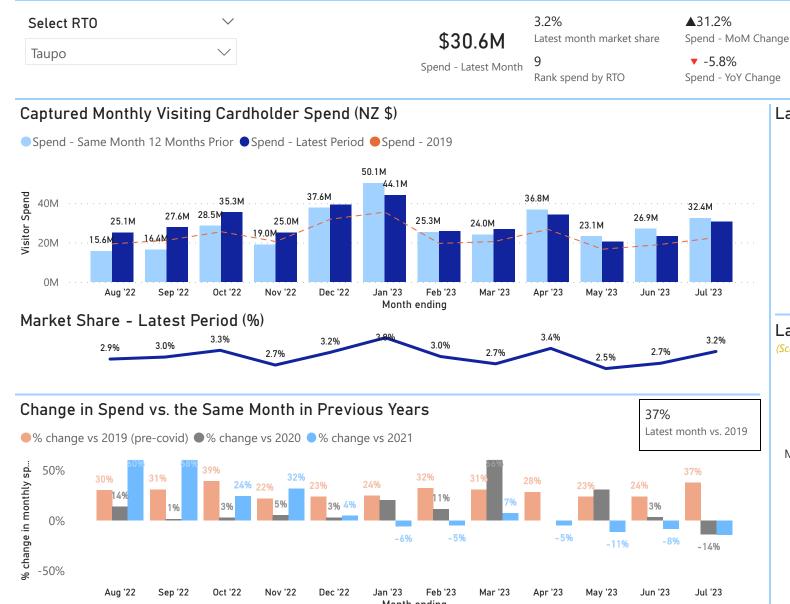




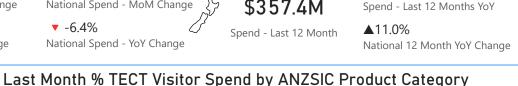


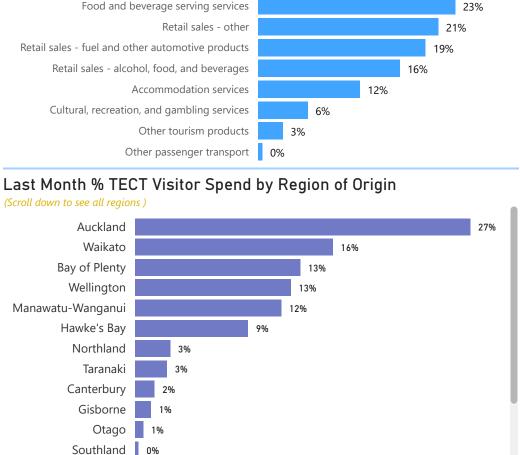
TECT Domestic Visitor Spend - Taupo - Month Ending 31 Jul'23









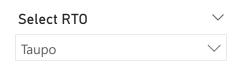


Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions: MoM** (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 - Taupo - Month Ending 31 Jul'23





Market Share - Latest Period (%)

\$3.2M Spend - Latest Month 1.3% Latest month market share

Rank spend by RTO

t share Spend - MoM Change

▲19.9%
Spend - YoY Change

▲34.5%

▲34.8%
National Spend - MoM Change
▲28.9%
National Spend - YoY Change

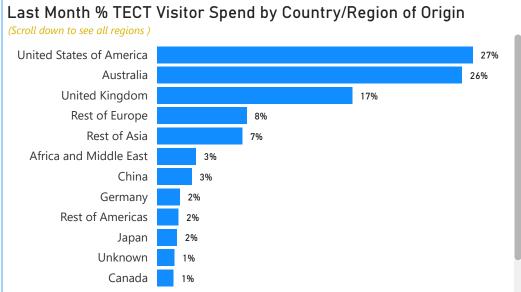
Spend - Last 12 Months YoY **A**268.0%

National 12 Month YoY Change

Captured Monthly Visiting Cardholder Spend (NZ \$) Spend - Same Month 12 Months Prior Spend - Latest Period Spend - 2019 10M 8.2M 9.6M 0.6M 0.4M 0.4M 0.7M 0.5M 0.9M 1.3M 0.7M 0.8M 1.7M 1.4M 2.8M 1.7M 1.4M 2.8M 1.7M 1.4M 2.8M 1.7M 1.4M 2.7M 3.2M 0.6M Aug '22 Sep '22 Oct '22 Nov '22 Dec '22 Jan '23 Feb '23 Mar '23 Apr '23 May '23 Jul '23 Month ending







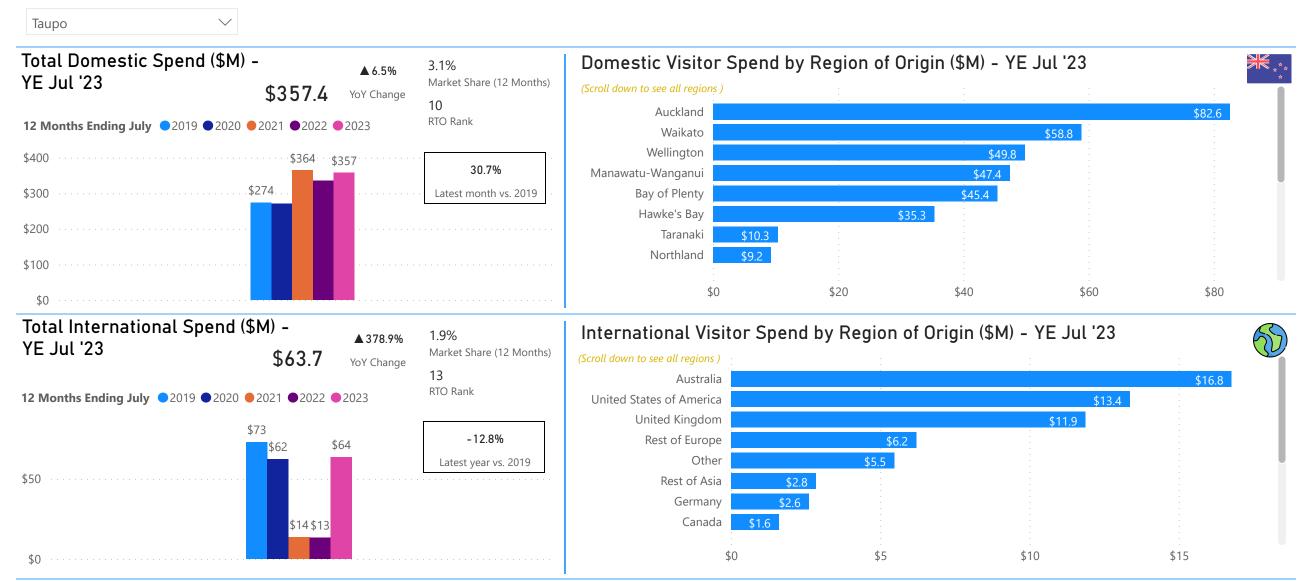
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1.3%

TECT Visitor Spend - Taupo RTO - 12 Months Ending 31 Jul'23





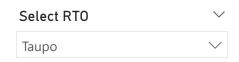


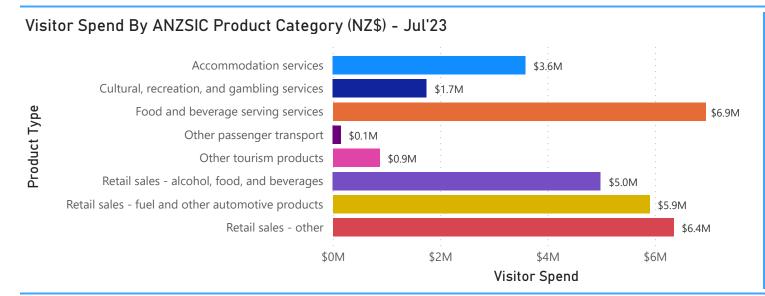
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Definitions: MoM (Month on Month Change) - Compares reported month to previous month | YoY (Year on Year Change) - Compares reported month of the previous year | YE (Year Ending) - Sum of the 12 months up to

TECT Domestic Visitor Spend By Product - Taupo - Month Ending 31 Jul'23

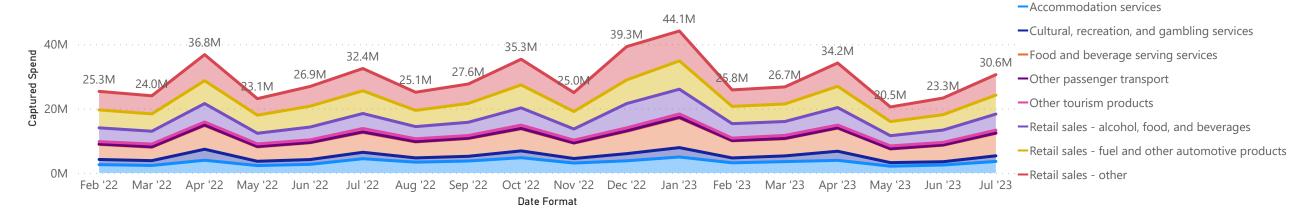






Change in Spend vs. Previous Periods **Product** MoM YoY YoY 2019 Retail sales - other ▲22.6% ▼ -8.2% ▲27.7% Retail sales - fuel and other automotive products ▲23.8% **▼** -16.3% ▲58.0% ▲38.8% Retail sales - alcohol, food, and beverages ▲30.0% **▲**7.0% Other tourism products **▲**11.7% **▼** -15.7% **▼** -6.2% **▲**47.3% **▼** -16.3% **▼** -35.1% Other passenger transport Food and beverage serving services ▲35.8% **▲**12.7% ▲59.4% Cultural, recreation, and gambling services **▲**71.0% **▼** -12.3% ▲55.5% Accommodation services **▲**45.0% **▼** -19.1% ▲8.9% **Total ▲31.2% ▼** -5.8% ▲37.3%

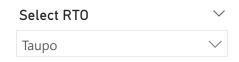
Visitor Spend by ANZSIC Product Categoy (NZ\$)

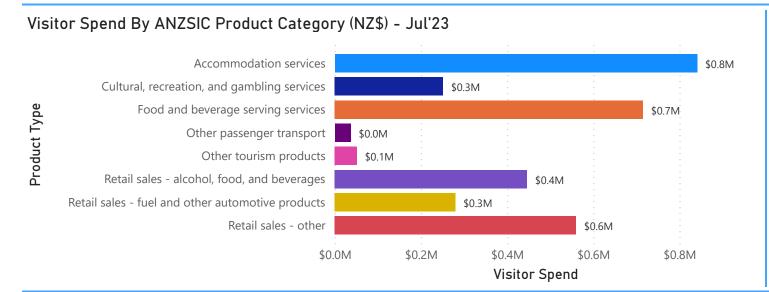


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TECT International Visitor Spend By Product - Taupo - Month Ending 31 Jul'23

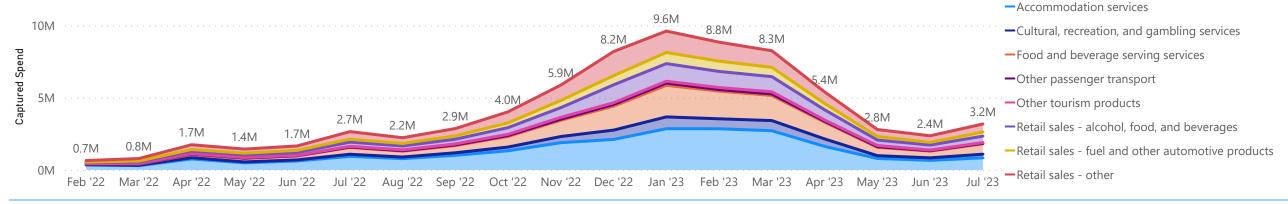






Change in Spend vs. Previous Periods Product MoM YoY YoY 2019 **▼** -10.8% **▼** -40.2% Accommodation services ▲26.2% Cultural, recreation, and gambling services **▲**74.2% **▲**45.0% **▼** -25.7% **▲**47.5% Food and beverage serving services ▲54.6% ▲51.7% Other passenger transport **▲**7.5% ▲23.7% **▼** -60.3% Other tourism products **▲**21.6% **▲**10.1% **▼** -14.4% Retail sales - alcohol, food, and beverages ▲29.0% **▲**53.1% **▲**34.7% Retail sales - fuel and other automotive products **▲**49.7% ▲38.7% **▲**11.5% Retail sales - other **▲**23.5% **▲**6.5% **▲**10.0% **Total ▲34.5% ▲19.9% ▼** -8.4%

Visitor Spend by ANZSIC Product Categoy (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 in Taupo RTO Area

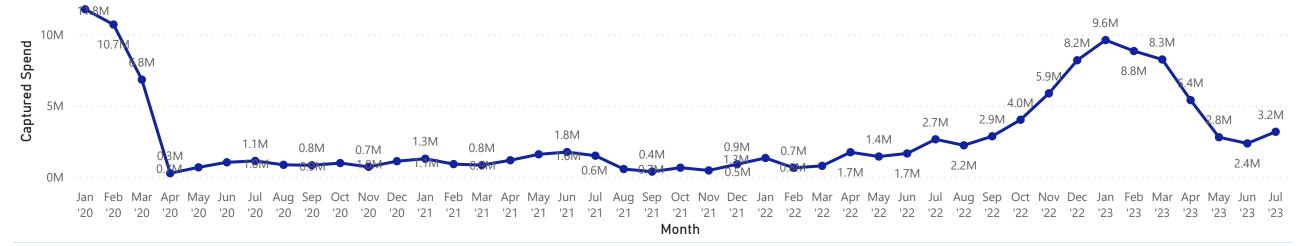




Domestic Visiting Cardholder Spend (NZ\$)



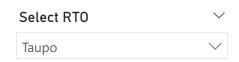
International Visiting Cardholder Spend (NZ\$)

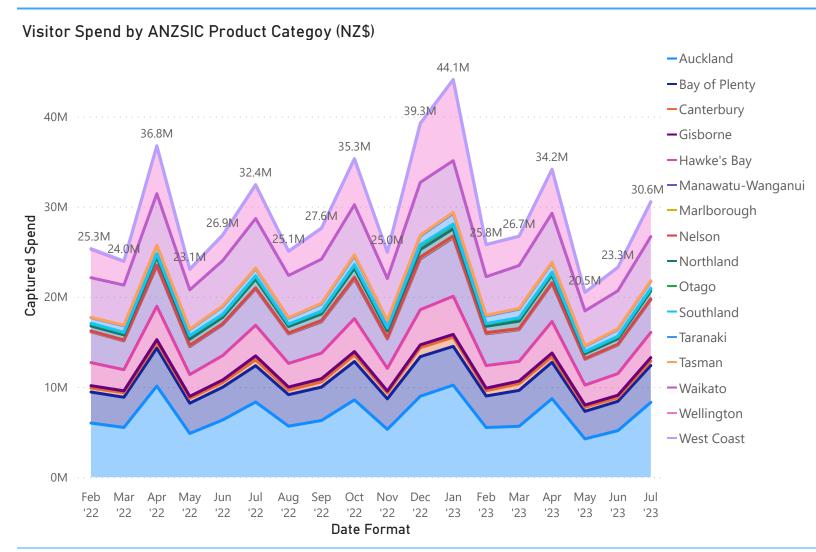


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TECT Domestic Visitor Spend By Origin - Taupo - Month Ending 31 Jul'23





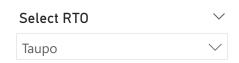


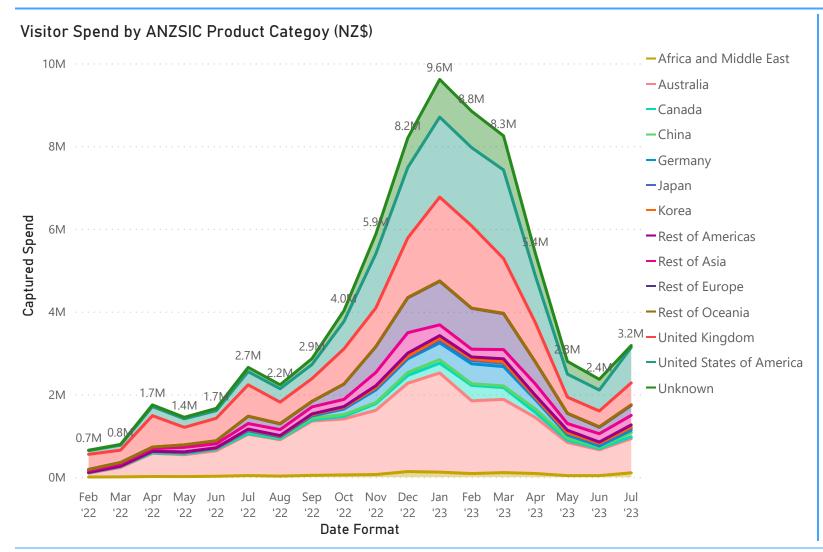
Change in Spend vs. Previous Periods							
Origin	Spend - Latest Month	atest		YoY 2019			
Auckland	\$8,299,421	▲60.8%	▼ -0.5%	▲33.8%			
Bay of Plenty	\$4,088,727	▲25.7%	▲1.6%	▲46.4%			
Canterbury	\$480,282	▲17.4%	▼ -26.5%	▲16.2%			
Gisborne	\$392,697	▲ 47.1%	▼ -10.5%	▲69.8%			
Hawke's Bay	\$2,796,823	▲16.8%	▼ -17.6%	▲24.1%			
Manawatu-Wanganui	\$3,616,805	▲13.8%	▼ -10.3%	▲36.8%			
Marlborough	\$51,976	▲21.0%	▼ -26.1%	▲0.6%			
Nelson	\$51,278	▲32.8%	▲8.5%	▲106.4%			
Northland	\$869,512	▲ 43.0%	▼ -9.9%	▲ 52.5%			
Otago	\$199,811	▼ -3.2%	▼ -27.8%	▼ -22.6%			
Southland	\$84,534	▲23.6%	▼ -6.5%	▲85.6%			
Taranaki	\$791,565	▲ 4.0%	▼ -1.3%	▲35.7%			
Tasman	\$62,000	▲2.8%	▼ -9.0%	▲ 54.1%			
Waikato	\$4,895,776	▲ 16.0%	▼ -10.7%	▲34.5%			
Wellington	\$3,852,122	▲48.5%	▲3.5%	▲ 55.4%			
West Coast	\$17,464	▲0.0%	▼ -55.5%	▲49.8%			
Total	\$30,550,793	▲31.2%	▼ -5.8%	▲37.3%			

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 year

TECT International Visitor Spend By Origin - Taupo - Month Ending 31 Jul'23







Change in Spend vs. Previous Periods								
Origin	Spend - Latest Month	MoM	YoY	YoY 2019				
Africa and Middle East	\$105,749	▲182.7%	▲175.2%	▲74.5%				
Australia	\$827,132	▲32.3%	▼ -17.2%	▼ -34.4%				
Canada	\$44,287	▲ 53.0%	▲183.2%	▲7.3%				
China	\$93,571	▲217.7%	▲87.9%	▼ -44.7%				
Germany	\$61,756	▲94.2%	▲226.0%	▼ -49.2%				
Japan	\$54,224	▲1.6%	▲306.9%	▲264.5%				
Korea	\$18,930	▲ 54.2%	▲8.1%	▼ -26.2%				
Rest of Americas	\$57,845	▲87.2%	▲ 445.7%	▲38.4%				
Rest of Asia	\$230,638	▲15.1%	▲ 72.9%	▼ -7.8%				
Rest of Europe	\$243,066	▲ 52.6%	▲38.3%	▼ -28.5%				
Rest of Oceania	\$12,866	▲24.2%	▲ 471.5%	▼ -20.1%				
United Kingdom	\$529,056	▲38.9%	▼ -30.2%	▼ 0.0%				
United States of America	\$856,129	▲69.2%	▲169.3%	▲ 44.6%				
Unknown	\$46,969	▼ -81.9%	▼ -54.6%	▲339.0%				
Total	\$3,182,218	▲34.5%	▲19.9%	▼ -8.4%				

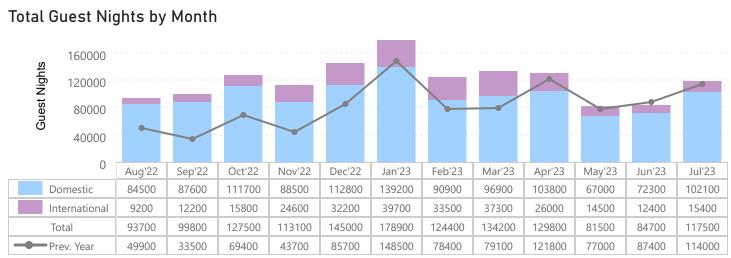
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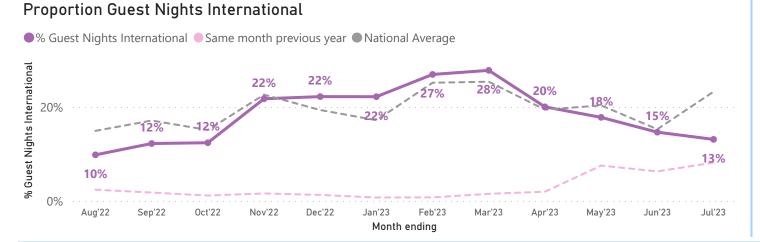
ADP RTO Summary - Taupo - Month Ending 31 Jul'23

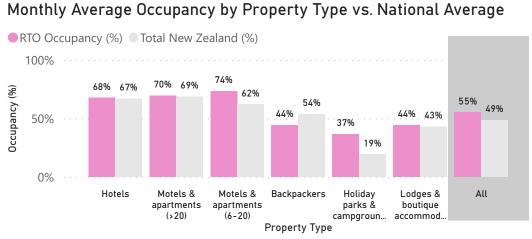






Occupancy Rate by Month RTO Occupancy Rate (%) RTO Same Month Previous Year National Average 100% 79% 74% 65% 67% 65% 67% 65% 71% 48% 55% 47% Aug'22 Sep'22 Oct'22 Nov'22 Dec'22 Jan'23 Feb'23 Mar'23 Apr'23 May'23 Jun'23 Jul'23 Month ending





^{**} **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



Bay of Plenty

Hurunui

Waitaki

Timaru

Fiordland

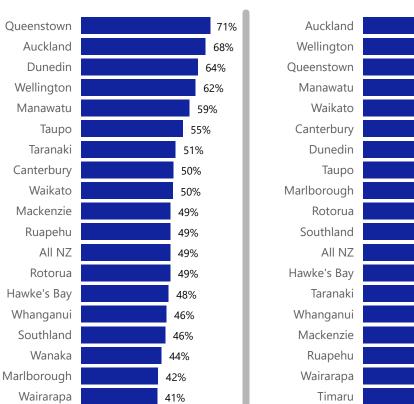
Kaikoura

Nelson Tasman

ADP Results - RTO Comparison - Month Ending 31 Jul'23



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



40%

40%

40%

35%

33%

32%

29%

Month Ending 30 June '23

Hurunui

Wanaka

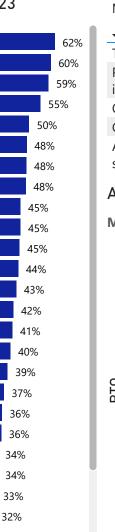
Waitaki

Fiordland

Kaikoura

Nelson Tasman

Bay of Plenty



32%

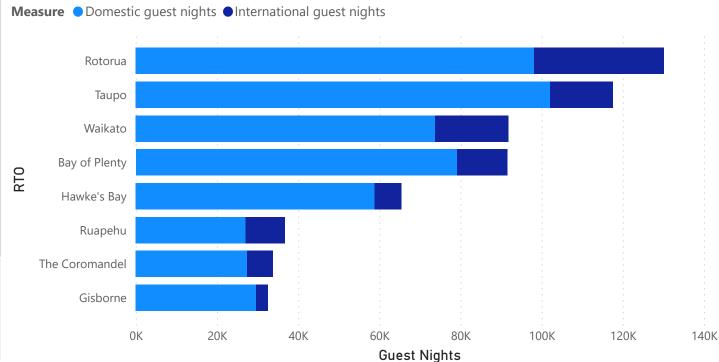
30%

28%

ADP Total Occupancy by RTO for the ADP Key Stats by CNI RTO for the Month Ending 30 June '23

Measure _▼	Bay of Plenty	Gisborne	Hawke's Bay	Rotorua	Ruapehu	Taupo	The Coromandel	Waikato
Total guest nights	91,700.00	32,600.00	65,400.00	130,100.00	36,700.00	117,500.00	33,700.00	91,800.00
Proportion of international guests	0.14	0.09	0.10	0.25	0.27	0.13	0.19	0.20
Occupancy rate	0.40	0.28	0.48	0.49	0.49	0.55	0.19	0.50
Guest arrivals	34,100.00	13,400.00	26,600.00	61,700.00	18,800.00	65,100.00	15,200.00	47,800.00
Average nights stayed per guest	2.70	2.40	2.50	2.10	1.90	1.80	2.20	1.90

ADP Guest Nights by CNI RTO for the Month Ending 30 June '23





Short Term Rental Stats for Taupo District - Month Ending 31 Jul'23





23.8K **Booked Nights**

▲27.2% **Booked Nights MoM** ▲18.3%

Booked Nights YoY

1.5K **Active Listings** Active Listings MoM Active Listings YoY

2022

▲1.8%

\$4.6M Monthly Revenue (USD)

2022

2022

▲33.3% Revenue MoM ▲23.9%

Revenue YoY

Monthly Occupancy

63%

2023

Occupancy MoM ▲10.1%

▲16.3%

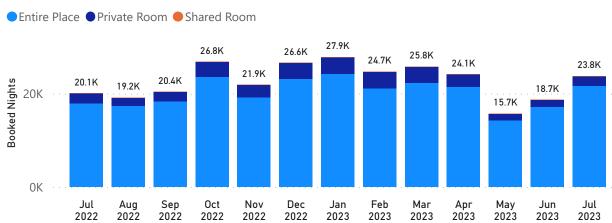
Occupancy YoY

2023

2023

2023



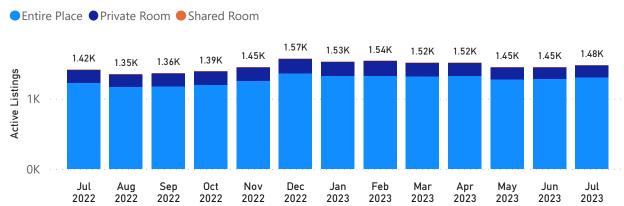


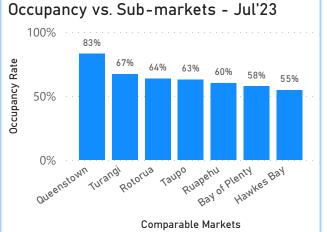
Monthly Occupancy Rate 66% Occupancy Rate Jul

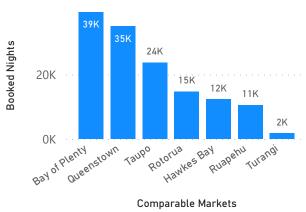
2022

2023

Monthly Active Listing Count by Type







Booked Nights vs. Sub-markets - Jul'23

^{**} **MoM** (Month on Month Change) - Compares reported month to previous month Source: AirDNA Monthly Trend Reporting

^{**}YoY (Year on Year Change) - Compares reported month to same month last year



New Zealand Inbound Border Crossing Data up to 31 Jul '23



518K

▲27.4% Total MoM

253K

▲23.8% Intl. MoM

264K

▲31.1% Dom. MoM

8/06/2020 31/07/2023

Drag slider to focus date range

Total - Latest Month ▲68%

▲68% Total YoY International - Latest Month

▲79% Int. YoY

% Domestic - Latest Month

▲59% Dom. YoY

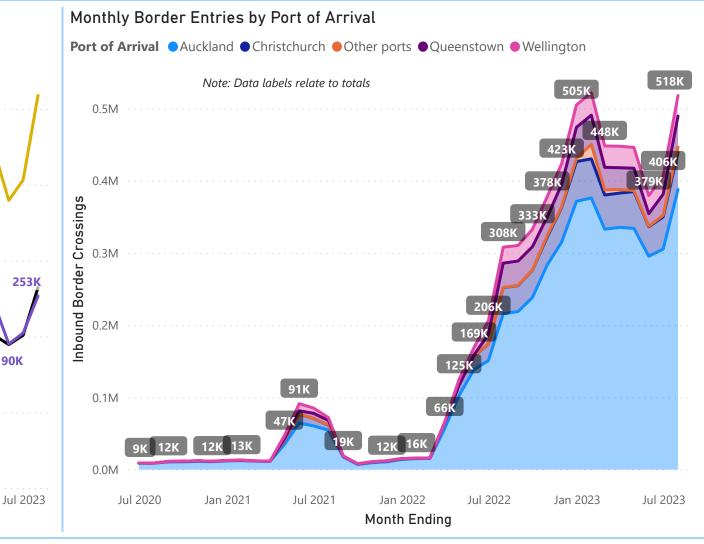
Monthly Border Entries by Passport Type **Traveller Type** ● New Zealand passport ● Other passports ● Total Note: Data labels relate to "Other passports" - hover over or see right hand graph for totals 0.5M 0.4M Inbound Border Crossings 315K 253K

Jan 2022

Month Ending

Jul 2022

Jan 2023

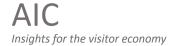


Source: StatsNZ COVID-19 data portal

Jul 2020

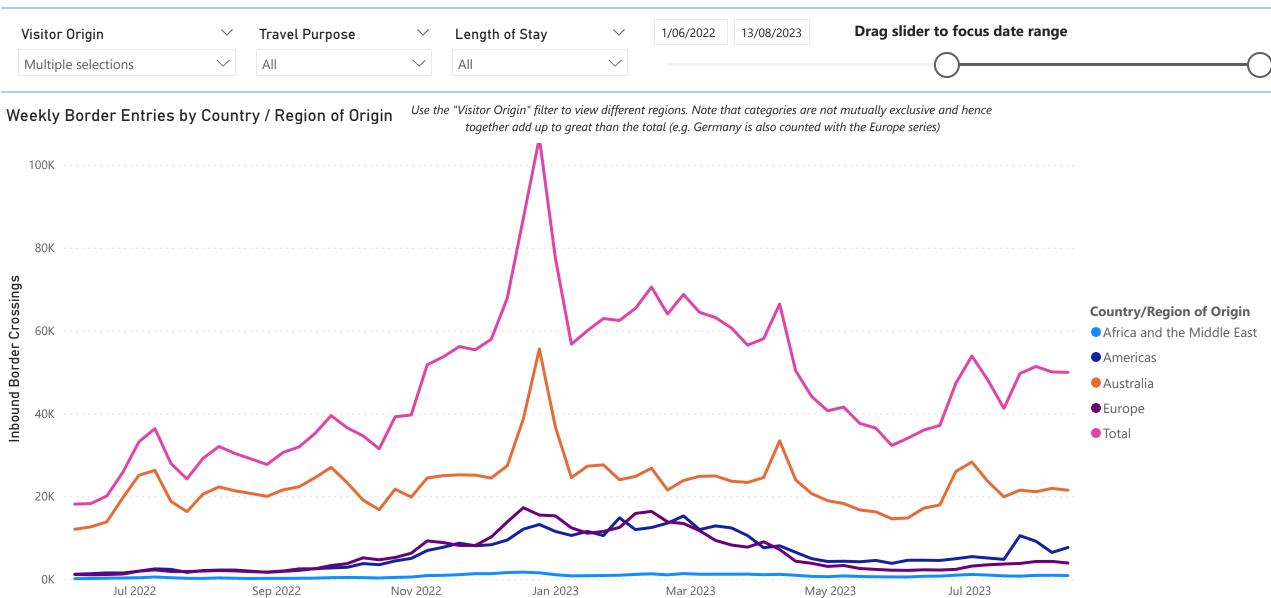
Jan 2021

Jul 2021



Border Entries by Visitor Origin - Provisional up to w/e 13/08/2023





Week Ending

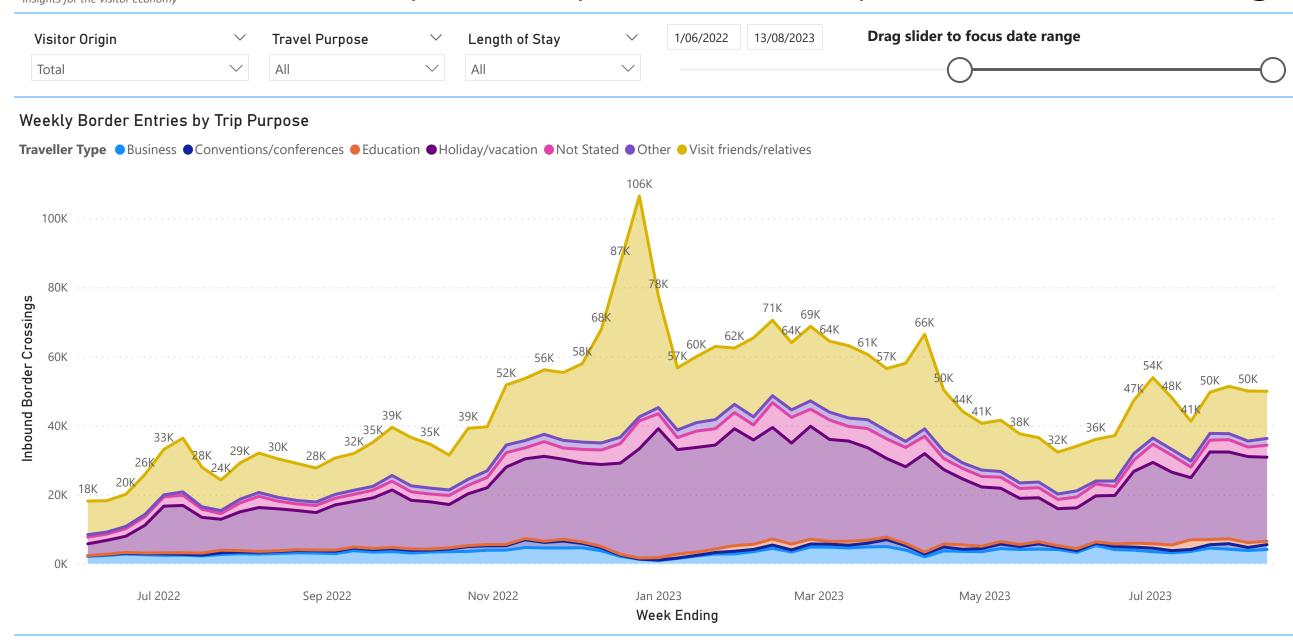
Source: StatsNZ Infoshare

AIC

Border Entries by Travel Purpose - Provisional up to w/e 13/08/2023







Source: StatsNZ Infoshare



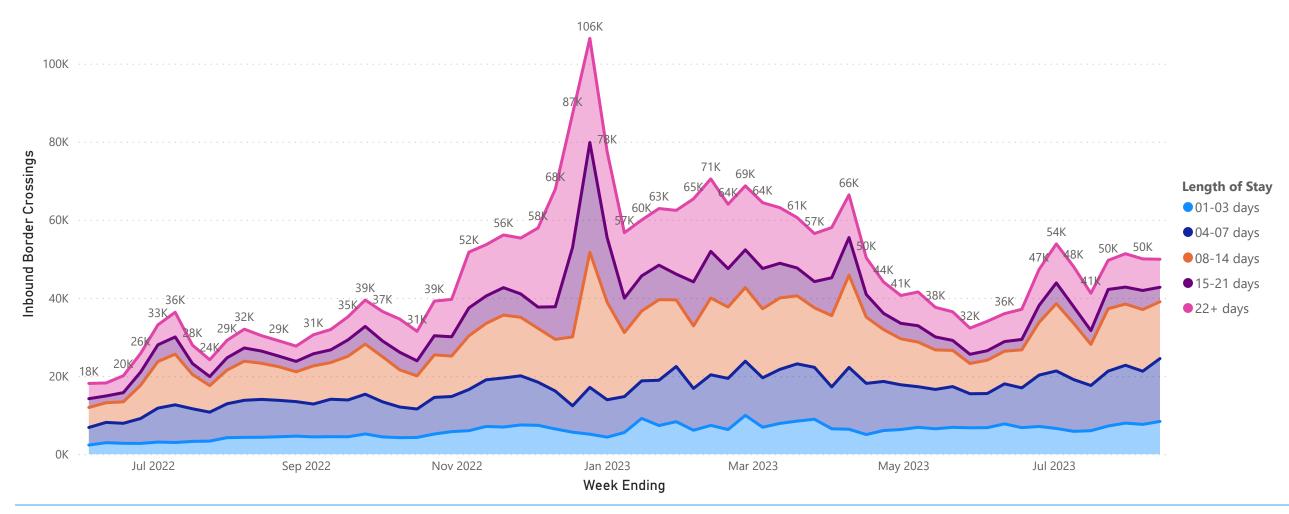
Border Entries by Length of Stay - Provisional up to w/e 13/08/2023







Weekly Border Entries by Length of Stay



Source: StatsNZ Infoshare