

June '23 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 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 Due to this limitation the coverage can be different for each area / accommodation type and some numbers may not be published to protect confidentiality of submitters.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 $1 \times 4 = 4$ 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.

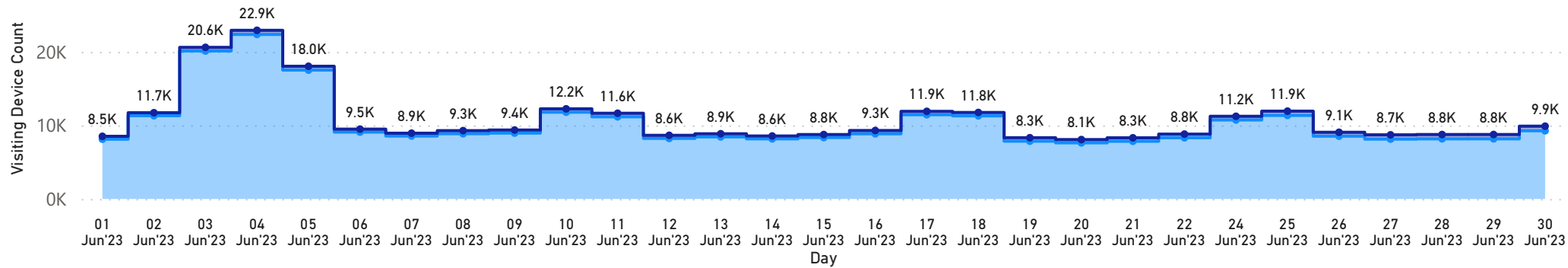


Select RTO ▼
 ▼

312.4K Total Visitor Days (Month)	1.9% Market Share – Visitor Days	▲39.5% Visitor Days - MoM Change	▲26.8% Visitor Days - National MoM	10.8K Daily Average (Latest Month)	22920 Max Daily Visitor #	4.4% % International
15 RTO Rank - Visitor Days	▲17.8% Visitor Days - YoY Change	▲33.5% Visitor Days - National YoY			8070 Min Daily Visitor #	

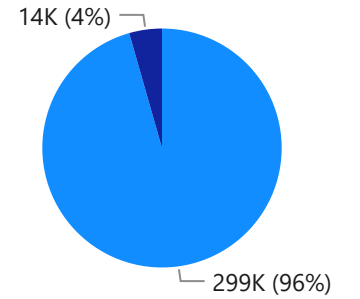
Daily Visitor Count (12 midday snapshot) - Jun'23

● Domestic ● International



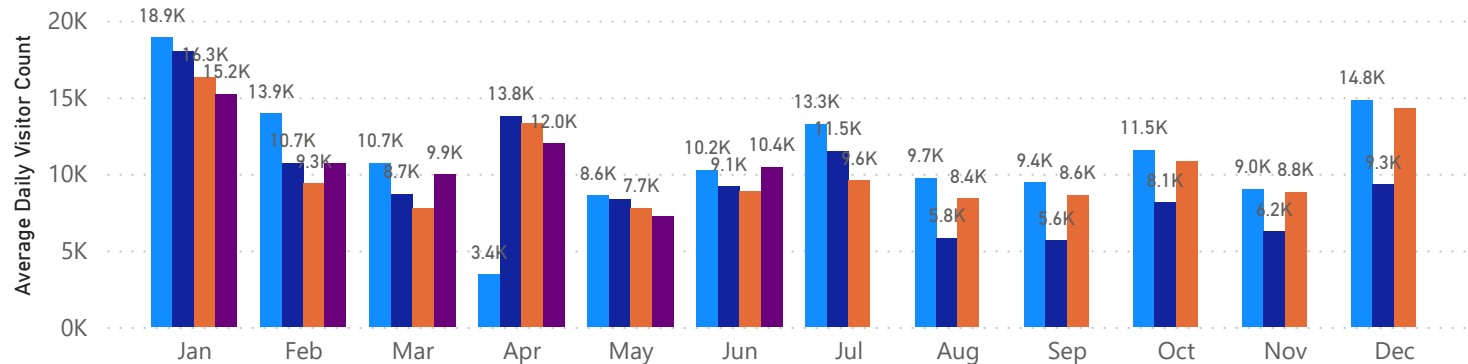
Total Visitor Days – Domestic vs. International

● Domestic ● International



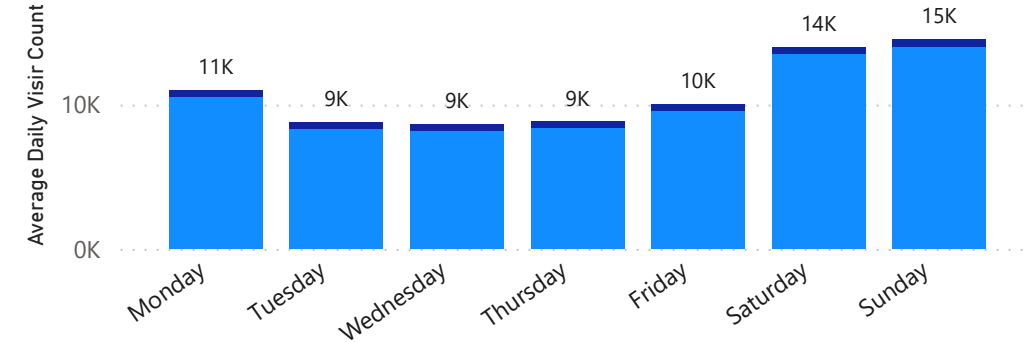
Average Daily Visitor Count by Month

Year ● 2020 ● 2021 ● 2022 ● 2023



Average Daily Visitor Count for Jun'23 by Day of the Week

● Domestic ● 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



Select RTO ▼
 ▼

298.6K
Total Visitor Days (Month)

1.8%
Market Share – Visitor Days

▲47.1%
Visitor Days - MoM Change

▲16.5%
Visitor Days - YoY Change

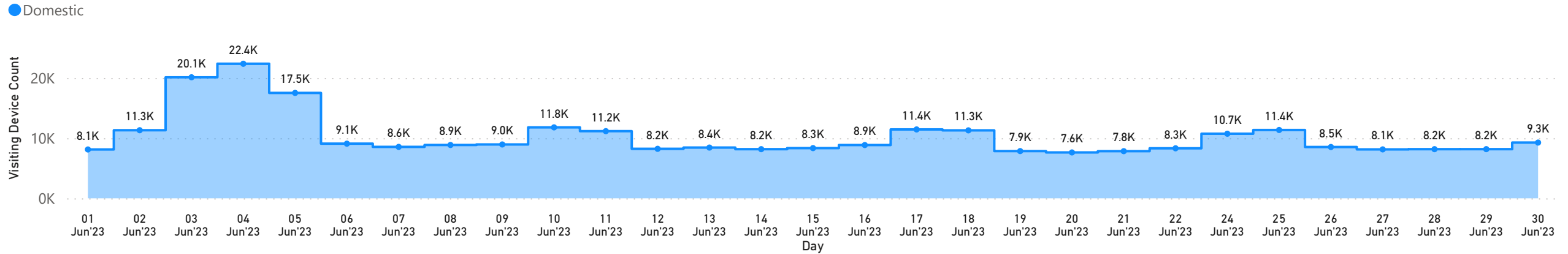


10.3K
Daily Average (Latest Month)

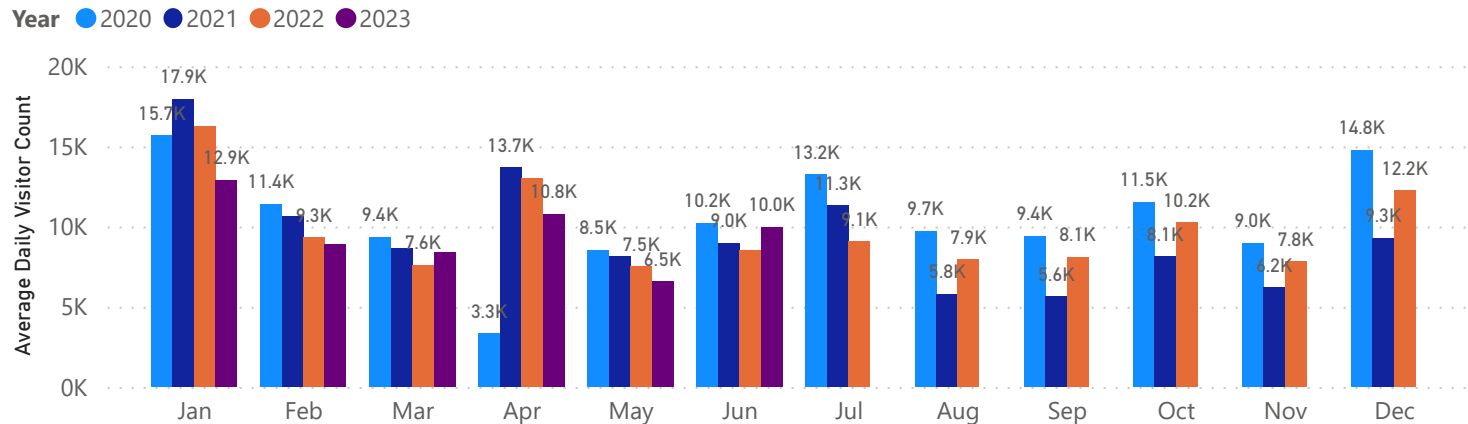
22362
Max Daily Visitor #

7626
Min Daily Visitor #

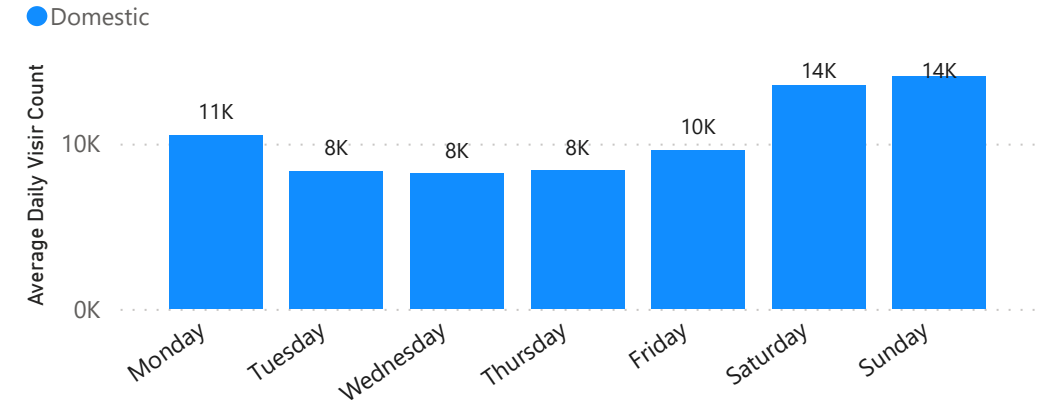
Daily Visitor Count (12 midday snapshot) - Jun'23



Average Daily Visitor Count by Month



Average Daily Visitor Count for Jun'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



Select RTO ▼
 ▼

13.8K
Total Visitor Days (Month)

0.1%
Market Share – Visitor Days

▼ -34.1%
Visitor Days - MoM Change

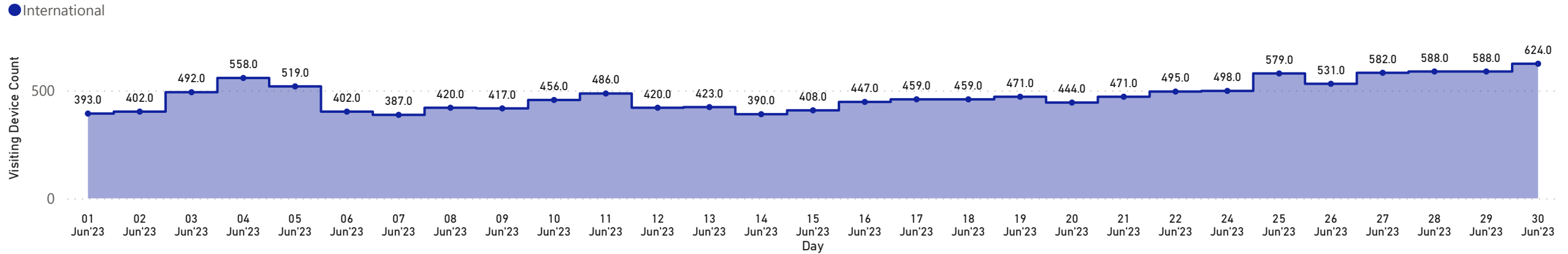
▲52.3%
Visitor Days - YoY Change

475
Daily Average (Latest Month)

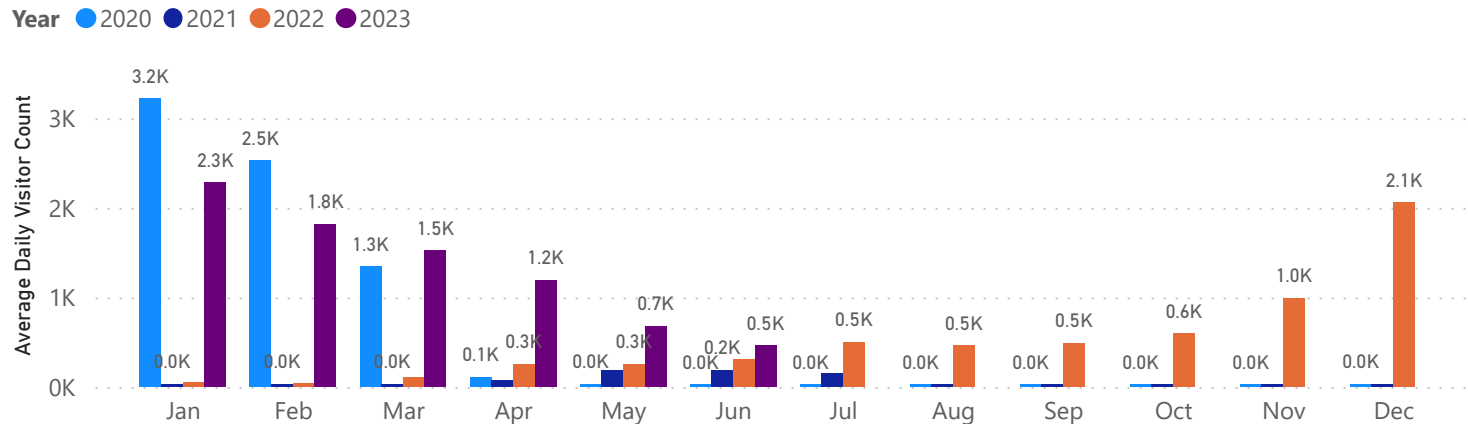
624
Max Daily Visitor #

387
Min Daily Visitor #

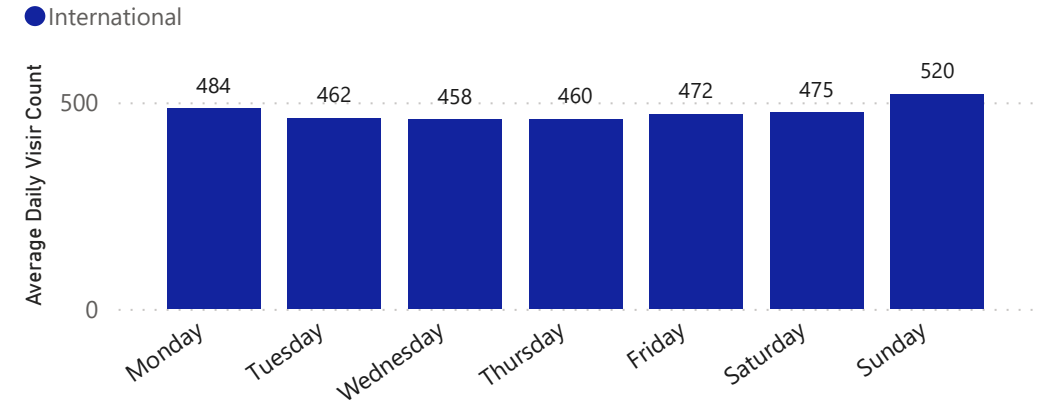
Daily Visitor Count (12 midday snapshot) - Jun'23



Average Daily Visitor Count by Month



Average Daily Visitor Count for Jun'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



Select RTO
Taupo

Population Type
Multiple selections

1.5M
Total Over Period

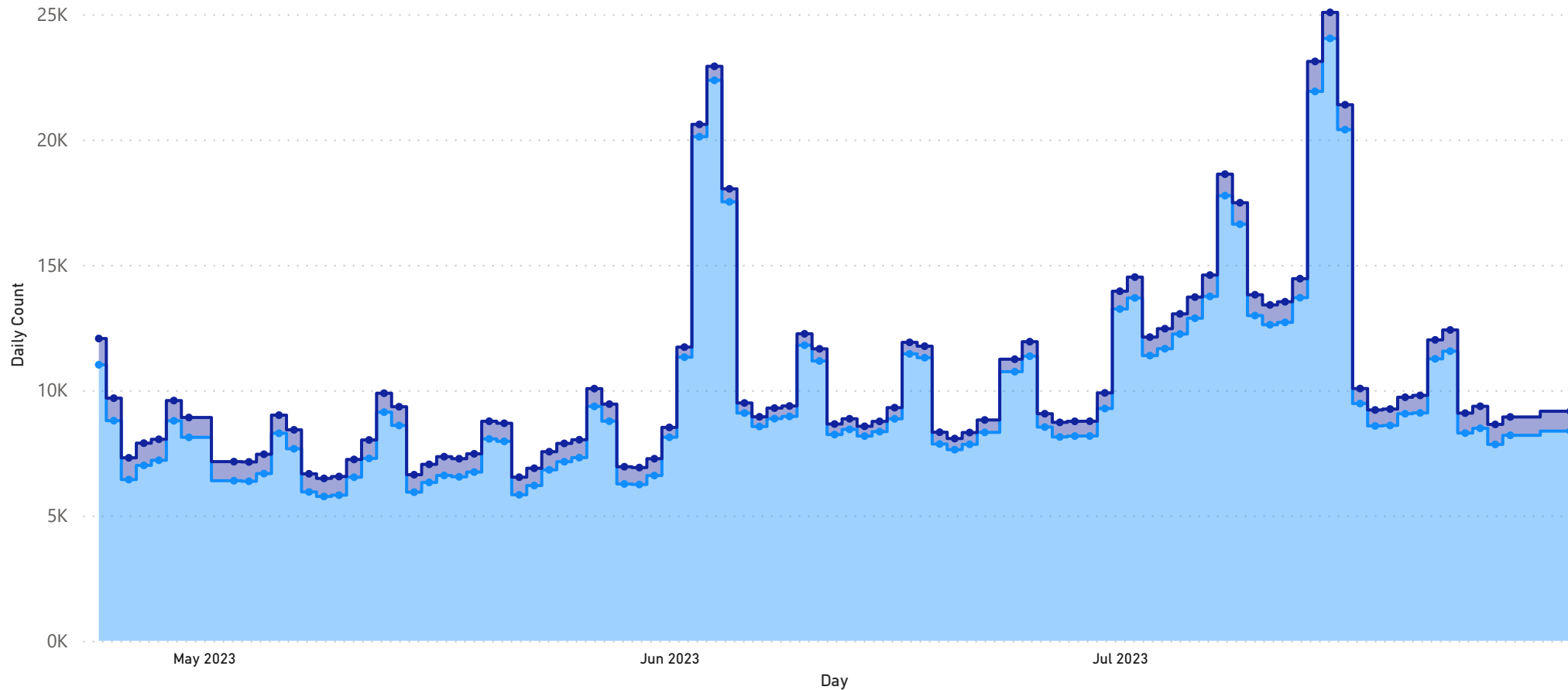
Date
24/04/2023 31/07/2023

Drag slider to focus date range



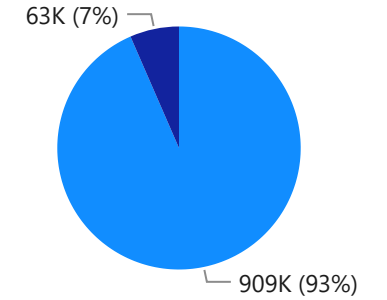
Daily Visiting Mobile Device Count (12 midday)

● Domestic ● International



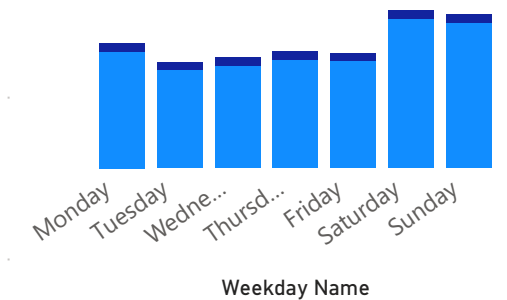
Domestic vs. International Split Over Selected Period

● Domestic ● International



Distribution by Weekday Over Selected Period

● Domestic ● International



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Select RTO
Taupo

Population Type
All

231.5K Latest Month Total
214.2K Latest Month Dom.
17.4K Latest Month Intl.

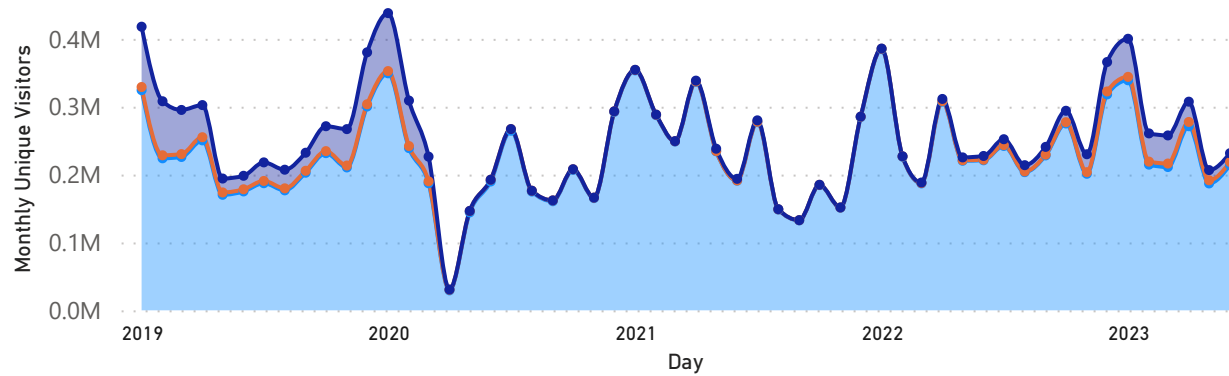
1/01/2019 1/06/2023

Drag slider to focus date range



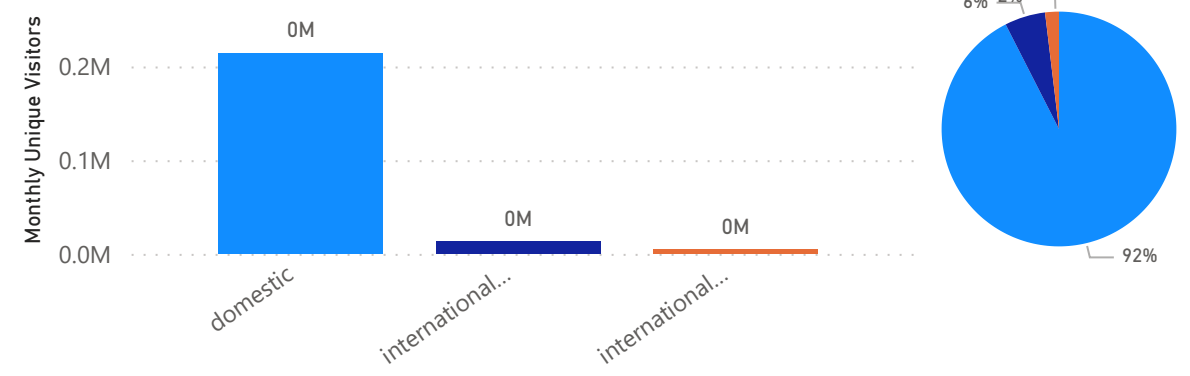
Monthly Unique Visitor Count by Type - All Time

● domestic ● international(long-term) ● international(short-term)



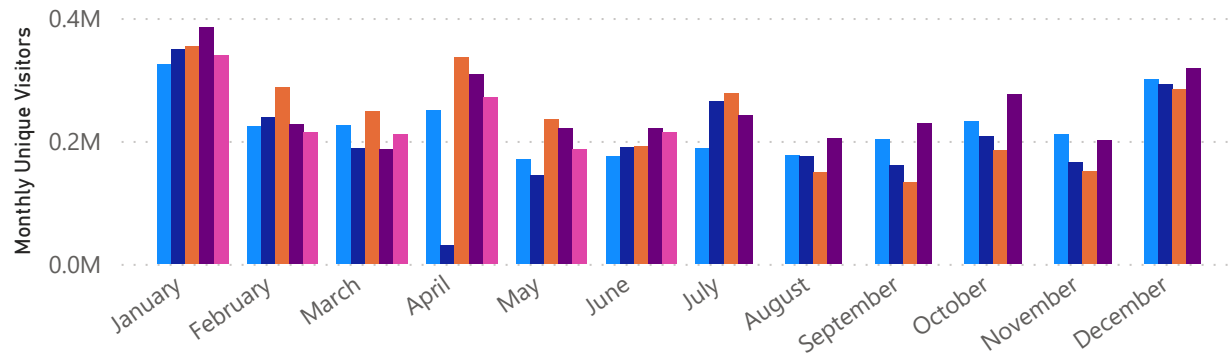
Monthly Unique Visitors by Type - Latest Month (Jun 23)

VisitorType ● domestic ● international(short-term) ● international(long-term)



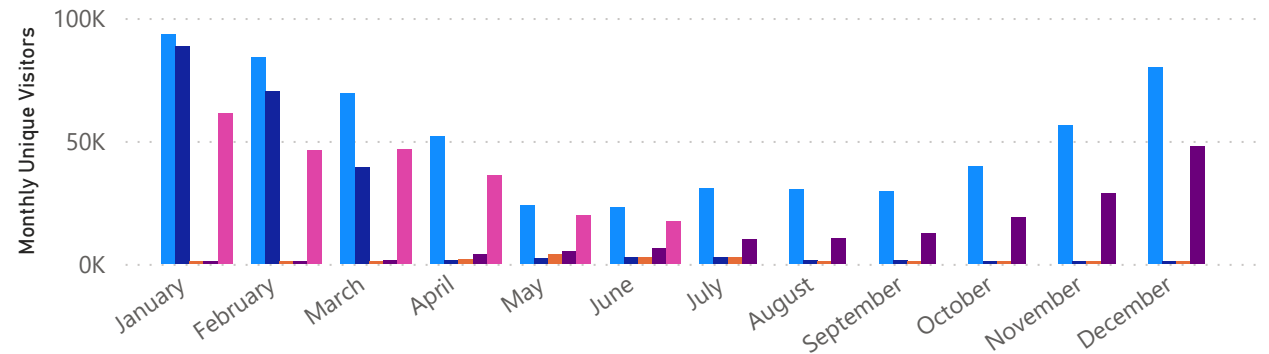
Monthly Unique Visitor Count - Domestic Only

Year ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



Monthly Unique Visitor Count - International Only

Year ● 2019 ● 2020 ● 2021 ● 2022 ● 2023



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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 ▼
 ▼

\$23.3M
Spend - Latest Month

2.7%
Latest month market share


11
Rank spend by RTO

▲13.6%
Spend - MoM Change

▼-13.2%
Spend - YoY Change

▲4.0%
National Spend - MoM Change

▼-5.1%
National Spend - YoY Change

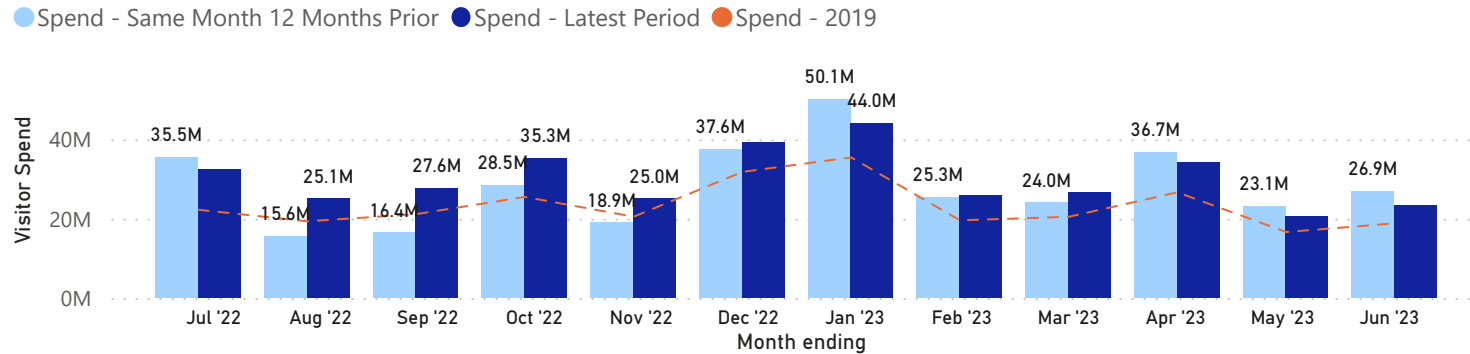


\$359.0M
Spend - Last 12 Month

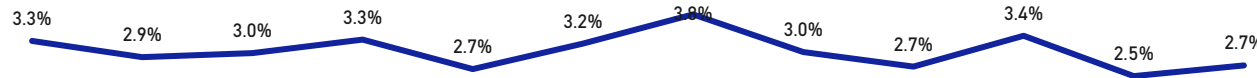
▲6%
Spend - Last 12 Months YoY

▲10.9%
National 12 Month YoY Change

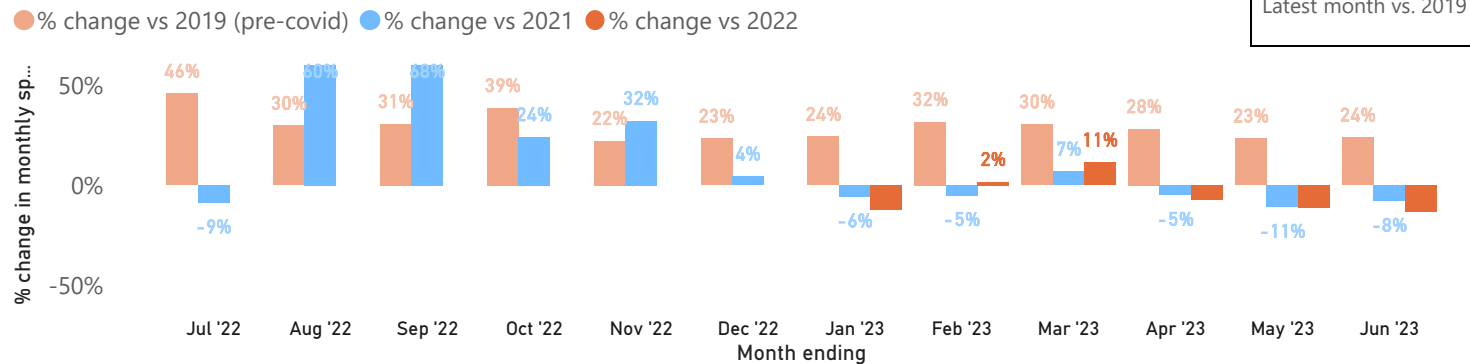
Captured Monthly Visiting Cardholder Spend (NZ \$)



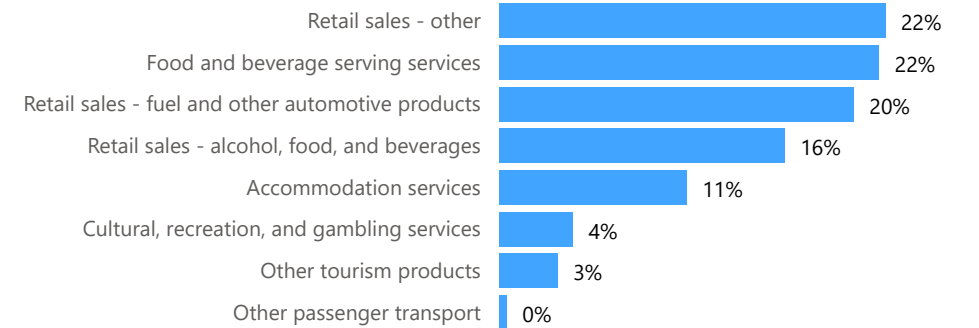
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

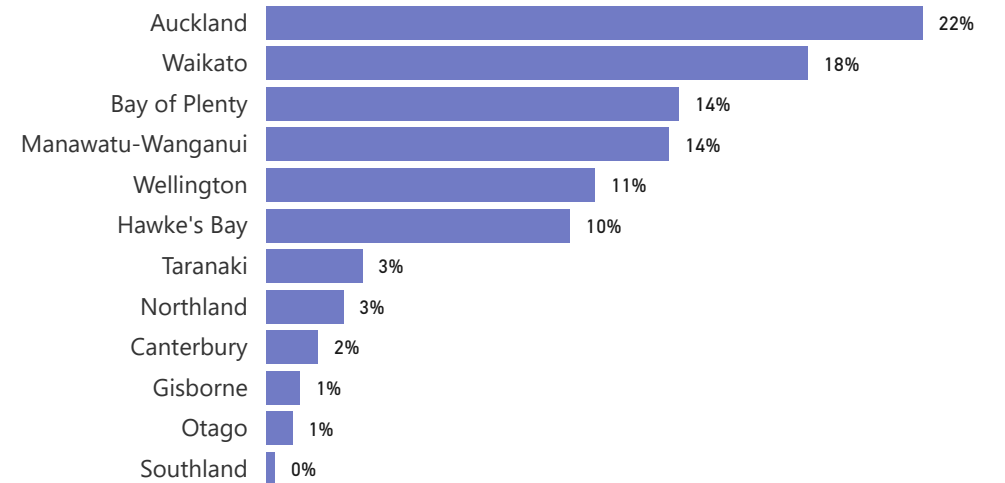


Last Month % TECT Visitor Spend by ANZSIC Product Category



Last Month % TECT Visitor Spend by 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

\$2.4M
Spend - Latest Month

1.3%
Latest month market share


13
Rank spend by RTO

▼ -15.3%
Spend - MoM Change

▲42.3%
Spend - YoY Change

▼ -8.2%
National Spend - MoM Change

▲49.6%
National Spend - YoY Change

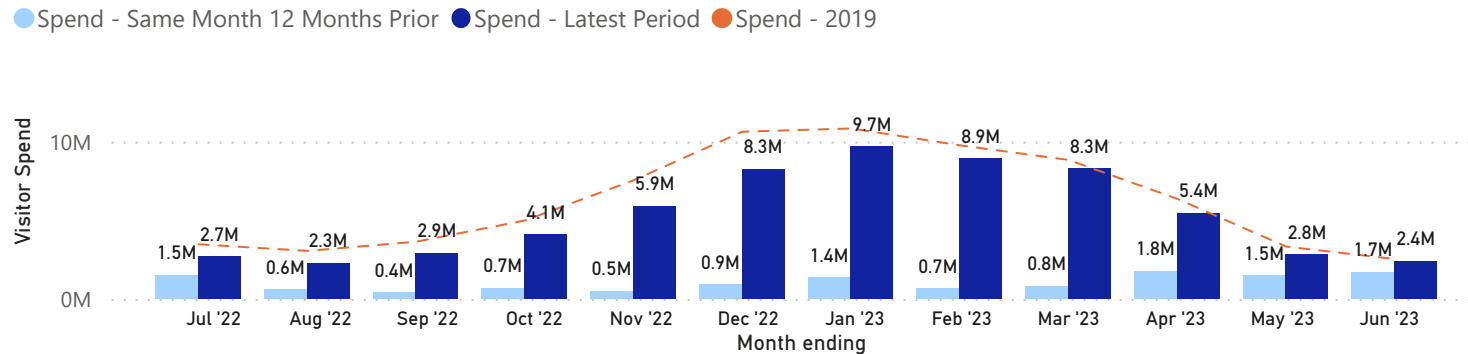


\$63.6M
Spend - Last 12 Month

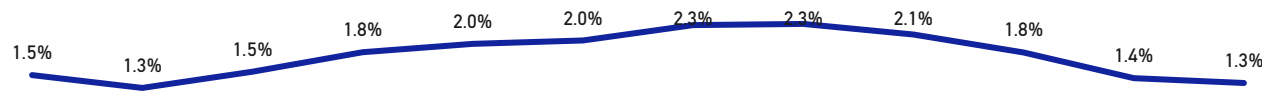
▲417%
Spend - Last 12 Months YoY

▲301.0%
National 12 Month YoY Change

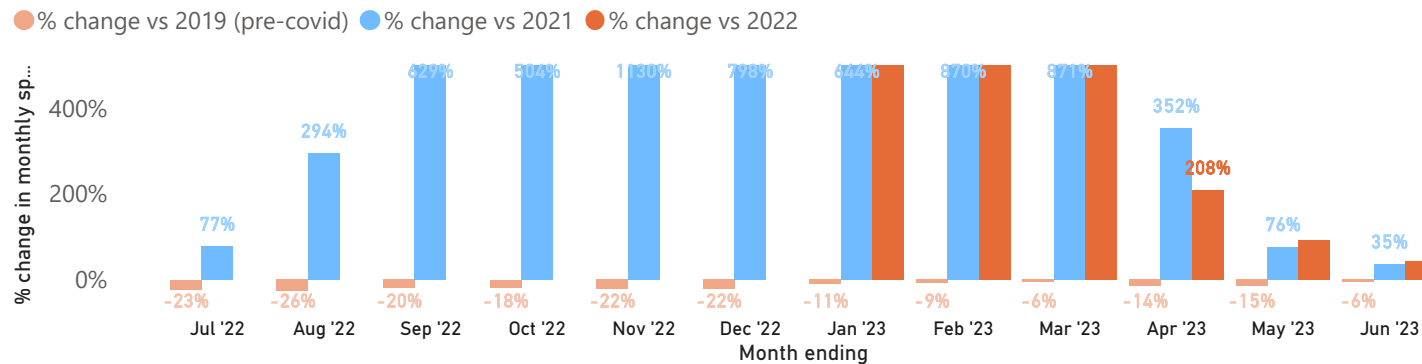
Captured Monthly Visiting Cardholder Spend (NZ \$)



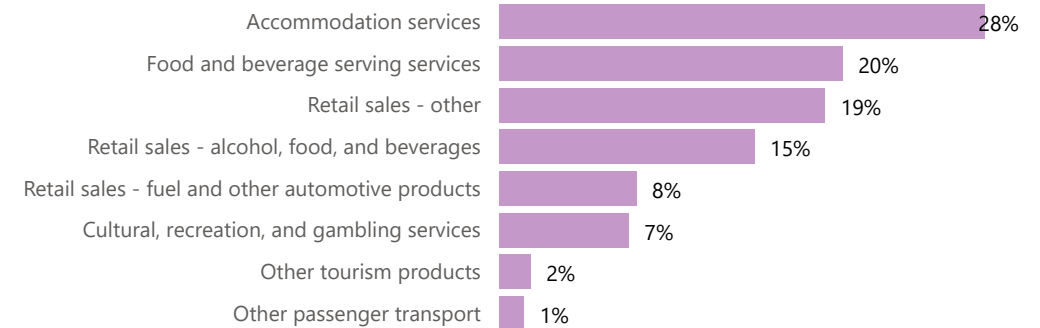
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

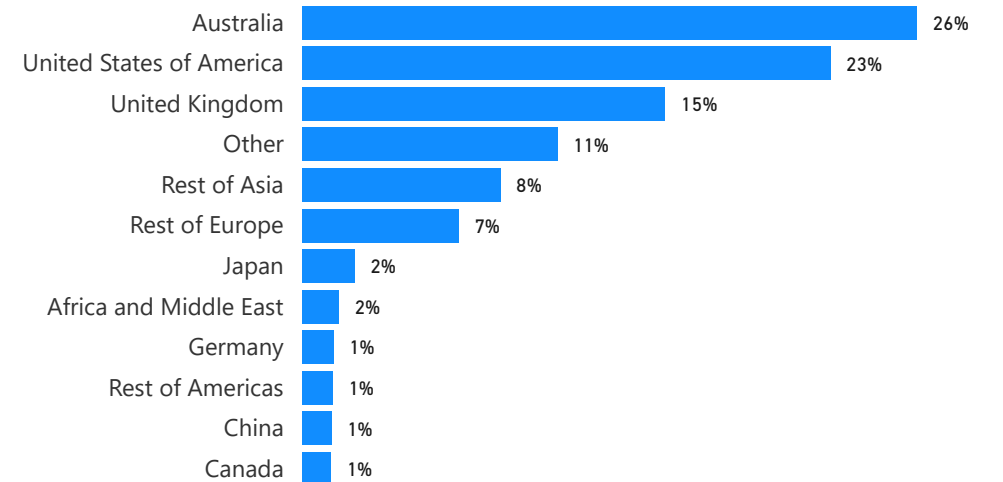


Last Month % TECT Visitor Spend by ANZSIC Product Category



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

TECT Visitor Spend - Taupo RTO - 12 Months Ending 30 Jun'23



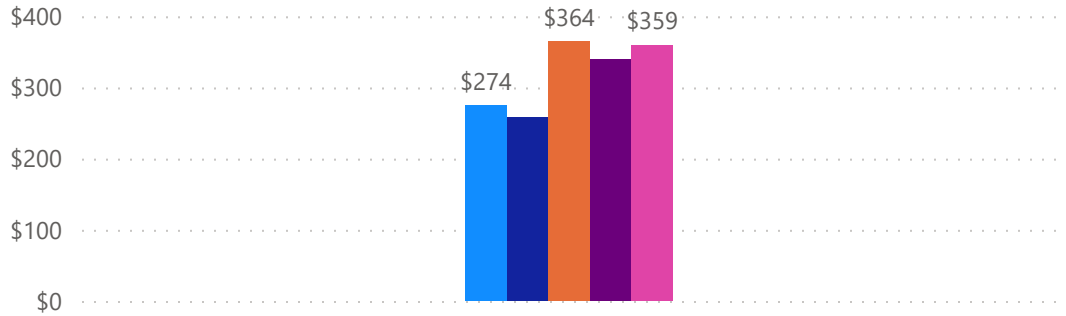
Select RTO ▼
 Taupo ▼

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

\$359.0
 ▲ 6.0% YoY Change

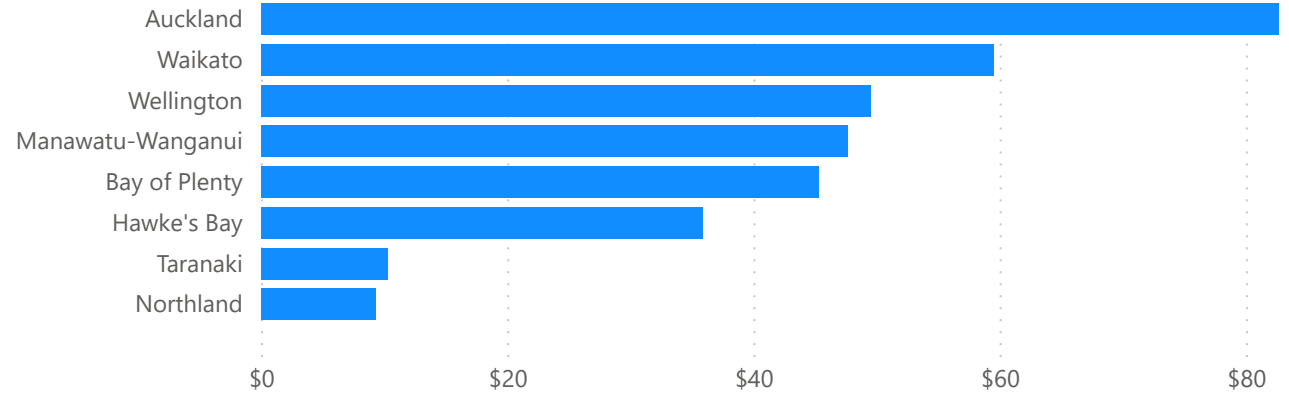
3.1% Market Share (12 Months)
 10 RTO Rank

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



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

(Scroll down to see all regions)

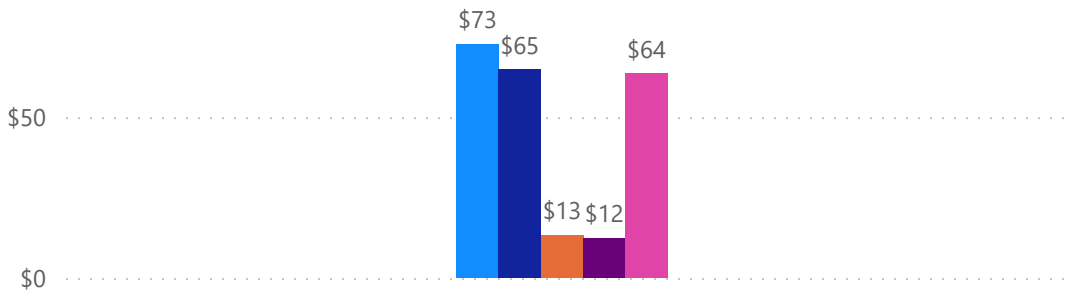


Total International Spend (\$M) - YE Jun '23

\$63.6
 ▲ 417.0% YoY Change

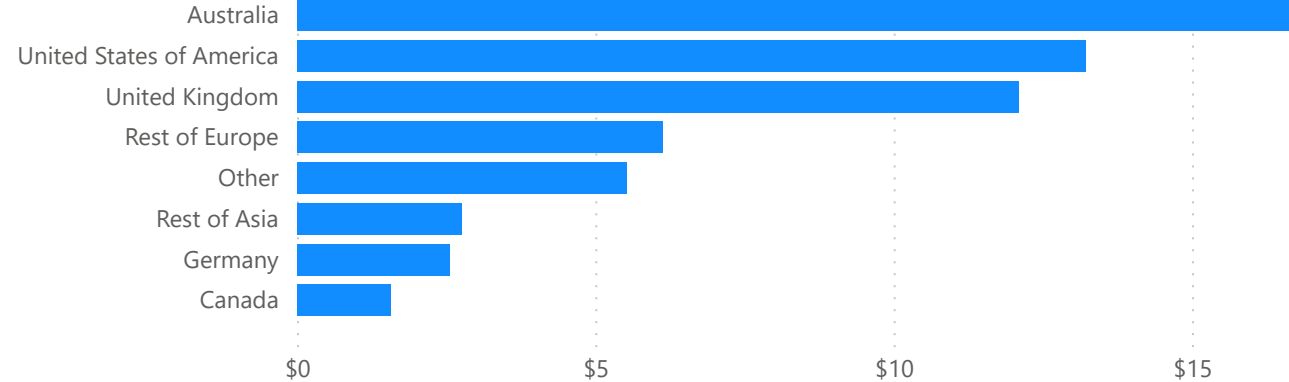
1.9% Market Share (12 Months)
 13 RTO Rank

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



International Visitor Spend by Region of Origin (\$M) - YE Jun '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.

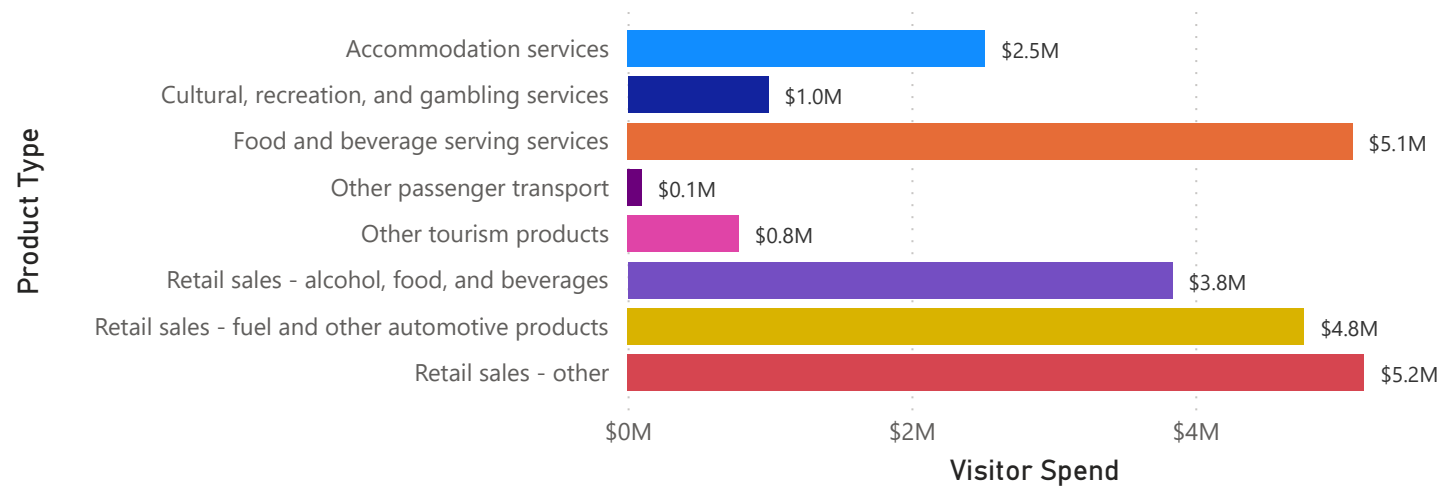
Definitions: MoM (Month on Month Change) - Compares reported month to previous month | YoY (Year on Year Change) - Compares reported month to same month of the previous year | YE (Year Ending) - Sum of the 12 months up to

TECT Domestic Visitor Spend By Product - Taupo - Month Ending 30 Jun'23



Select RTO ▼
 Taupo ▼

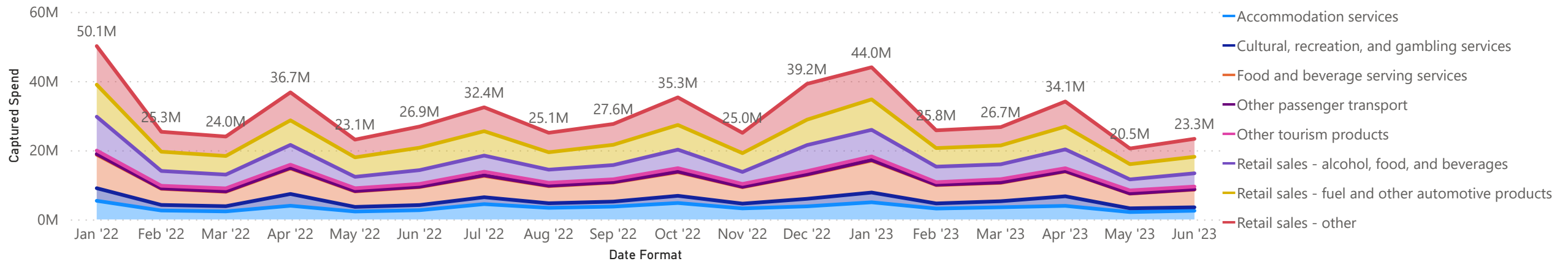
Visitor Spend By ANZSIC Product Category (NZ\$) - Jun'23



Change in Spend vs. Previous Periods

Product	MoM	YoY	YoY 2019
Accommodation services	▲17.9%	▼-5.8%	▼-4.2%
Cultural, recreation, and gambling services	▼-8.1%	▼-33.4%	▲16.0%
Food and beverage serving services	▲20.7%	▼-1.6%	▲36.6%
Other passenger transport	▲63.0%	▼-6.0%	▼-21.3%
Other tourism products	▼-10.9%	▼-2.9%	▲12.6%
Retail sales - alcohol, food, and beverages	▲20.7%	▼-3.7%	▲37.0%
Retail sales - fuel and other automotive products	▲8.3%	▼-26.5%	▲47.0%
Retail sales - other	▲14.5%	▼-15.1%	▲9.9%
Total	▲13.6%	▼-13.2%	▲23.8%

Visitor Spend by ANZSIC Product Category (NZ\$)



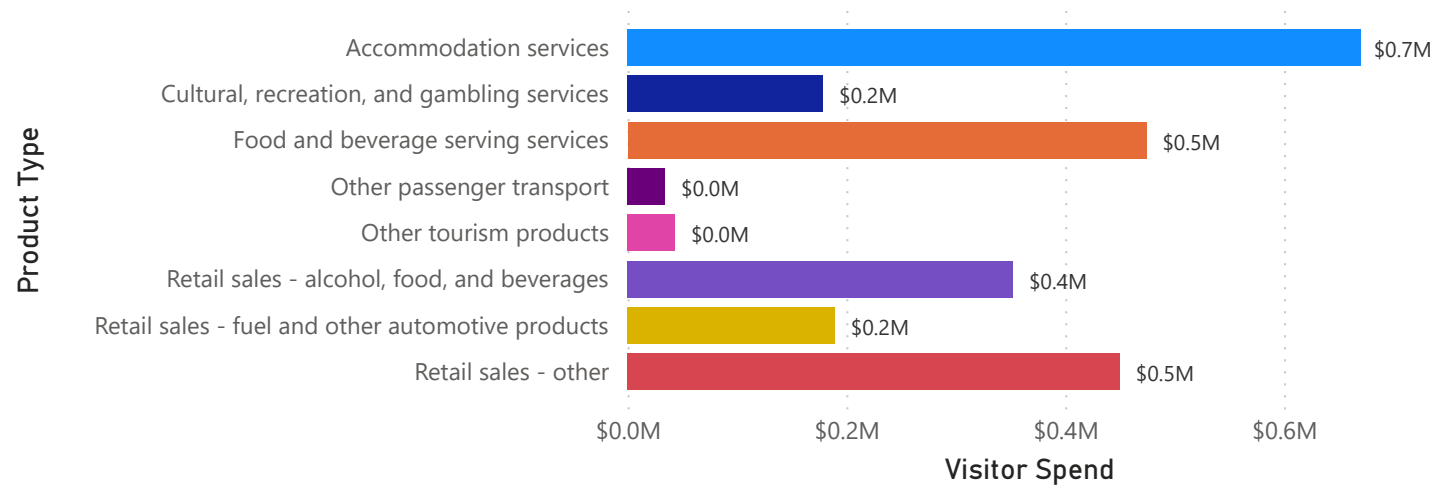
Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions:** MoM (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 30 Jun'23



Select RTO ▼
 Taupo ▼

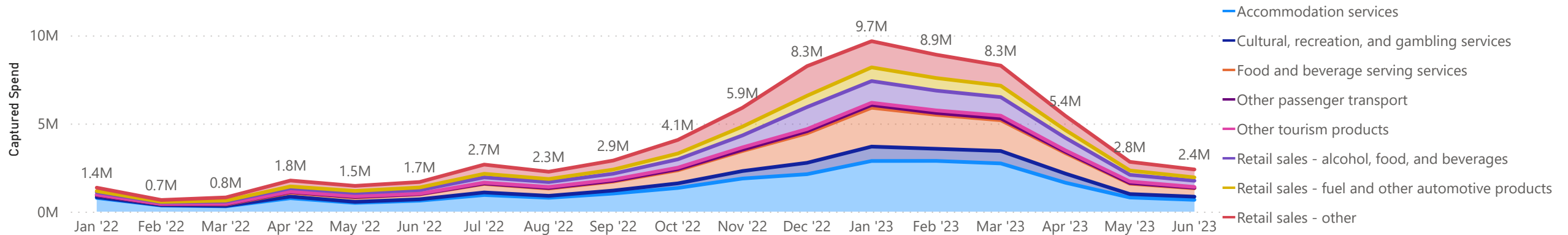
Visitor Spend By ANZSIC Product Category (NZ\$) - Jun'23



Change in Spend vs. Previous Periods

Product	MoM	YoY	YoY 2019
Accommodation services	▼ -16.5%	▲7.4%	▼ -21.9%
Cultural, recreation, and gambling services	▼ -8.5%	▲130.6%	▼ -34.5%
Food and beverage serving services	▼ -19.2%	▲69.3%	▲34.3%
Other passenger transport	▼ -17.3%	▲147.3%	▼ -63.2%
Other tourism products	▼ -45.8%	▲61.5%	▼ -47.4%
Retail sales - alcohol, food, and beverages	▼ -7.9%	▲74.6%	▲36.1%
Retail sales - fuel and other automotive products	▼ -22.4%	▲29.1%	▲5.3%
Retail sales - other	▼ -8.3%	▲44.7%	▲2.1%
Total	▼ -15.3%	▲42.3%	▼ -5.8%

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 in Taupo RTO Area



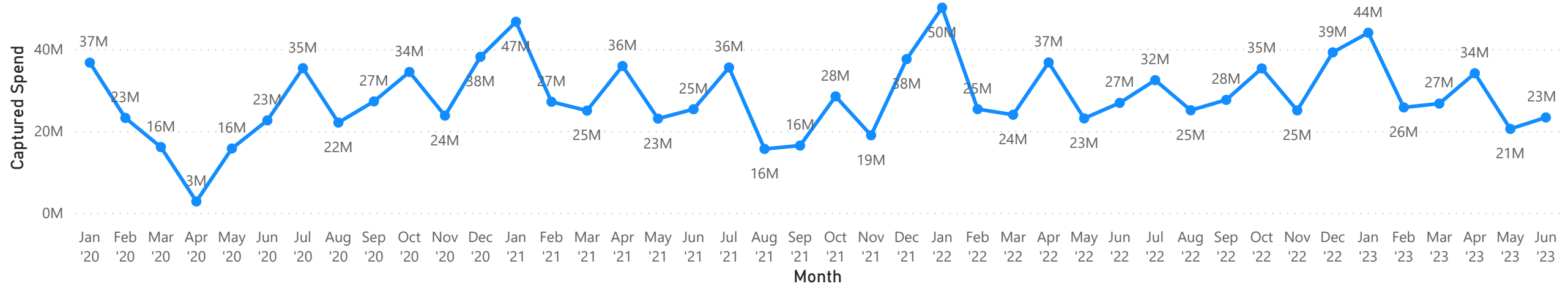
Select RTO ▼
 ▼

22/01/2020 30/06/2023

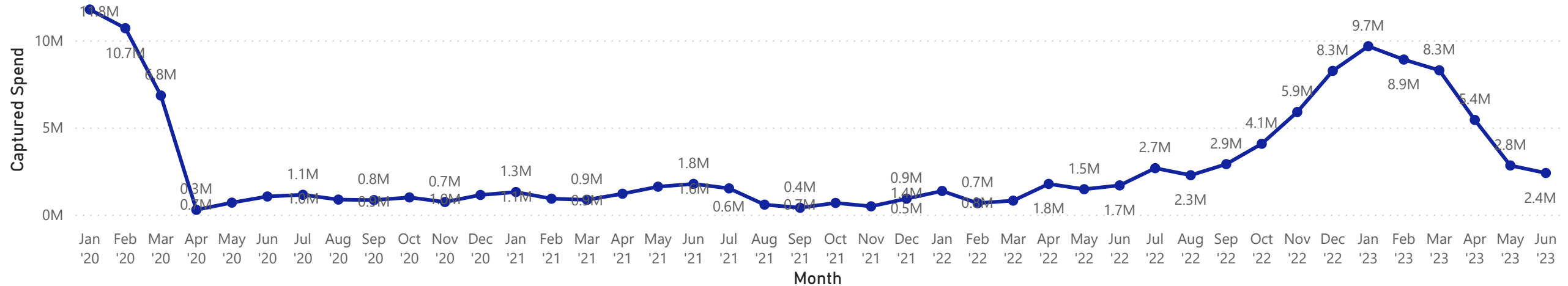
Drag slider to focus date range



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

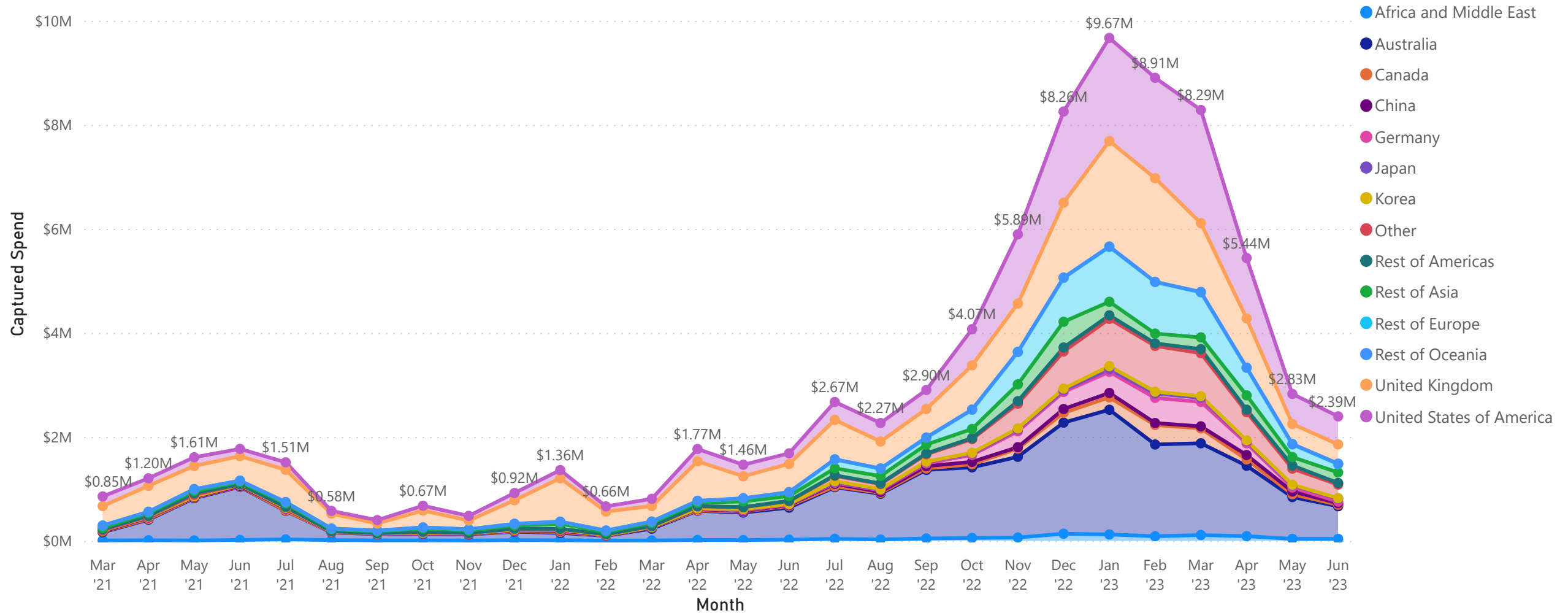
Select Visitor Origin
All

22/03/2021 30/06/2023

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

▲13.6% MoM 2.7% Share ▲4.0% National MoM ▲6% YoY
▼-13.2% YoY 11 RTO Rank ▼-5.1% National YoY ▲10.9% National YoY

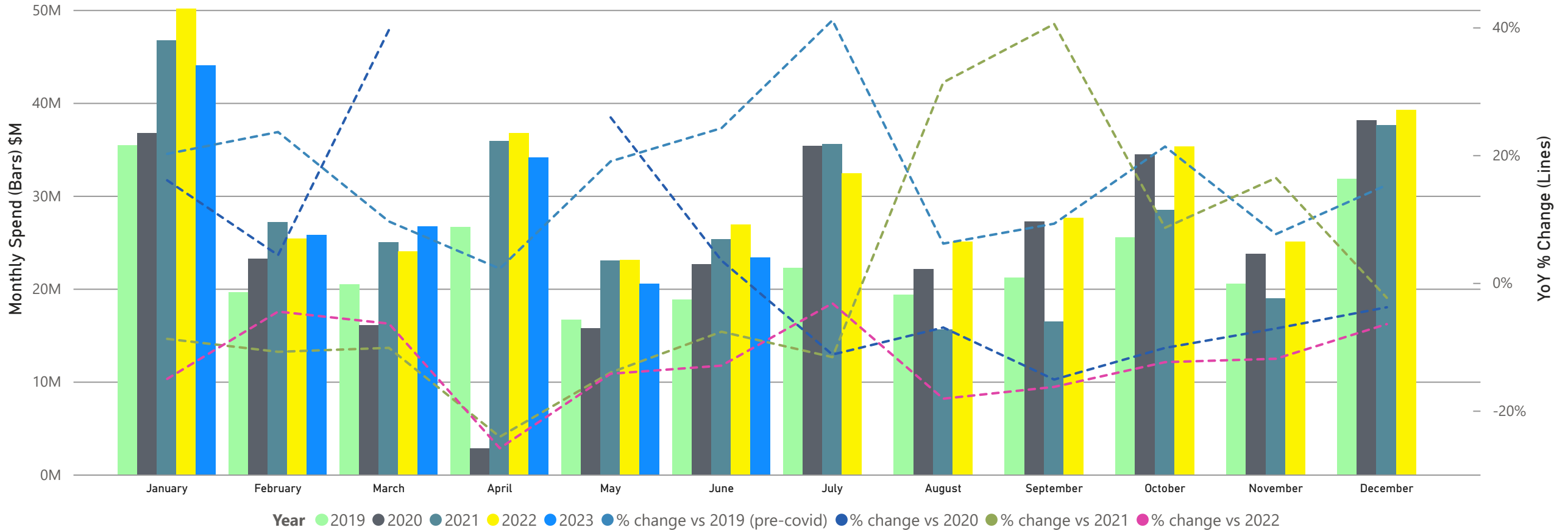
\$23.3M

Spend - Latest Month

\$359.0M

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 30 Jun'23



Select RTO
Taupo

Select Property Type
All

46.9K
Guest Arrivals (GA)
▲3.1% GA MoM Change
▲3.1% GA YoY Change

84.7K
Guest Nights (GN)

3.7% GN Market Share
6 GN Rank by RTO

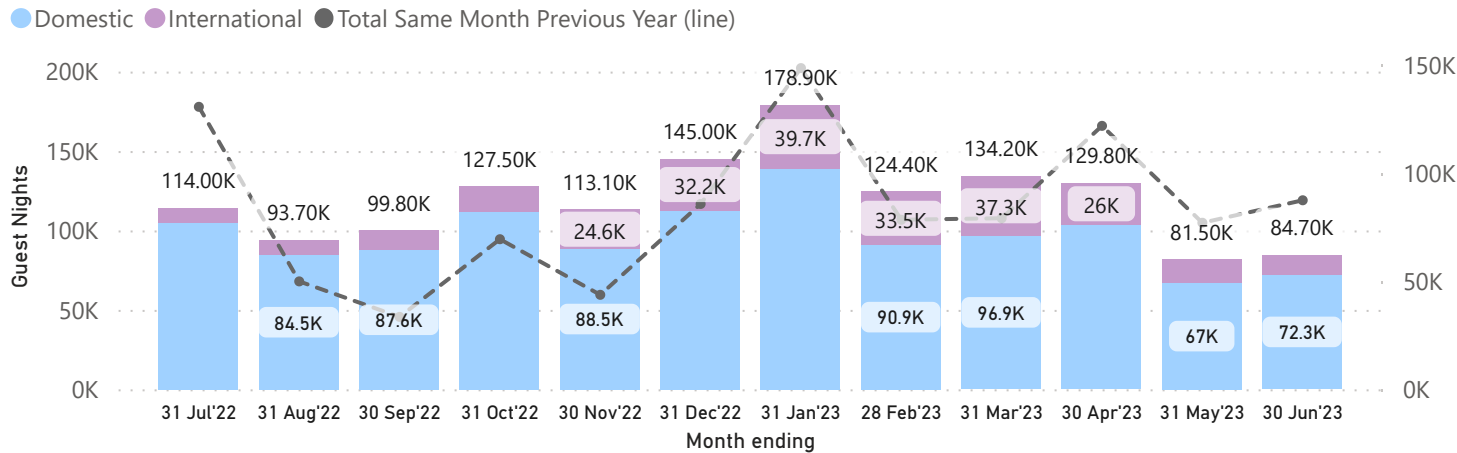
▲3.9% GN MoM Change
▼-3.1% GN YoY Change

▼-5.1% GN - National - MoM
▲10.1% GN - National - YoY

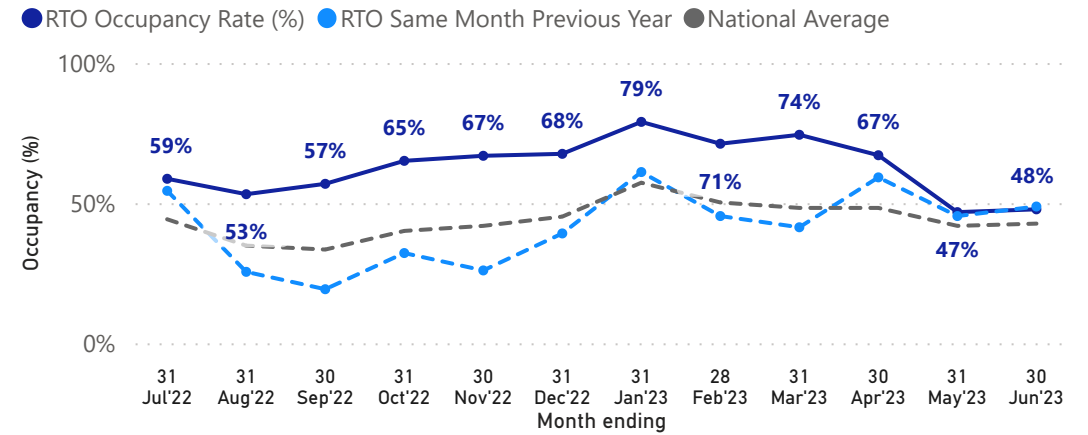


47.8%
Occupancy Rate (OR)
▲2.1% OR - MoM Change
▼-2.0% OR - YoY Change

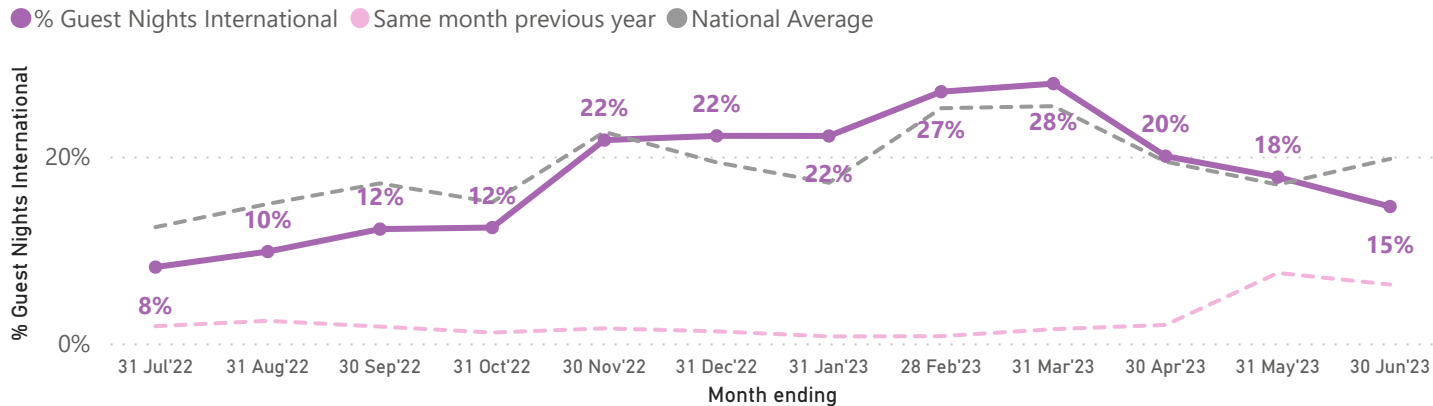
Total Guest Nights by Month



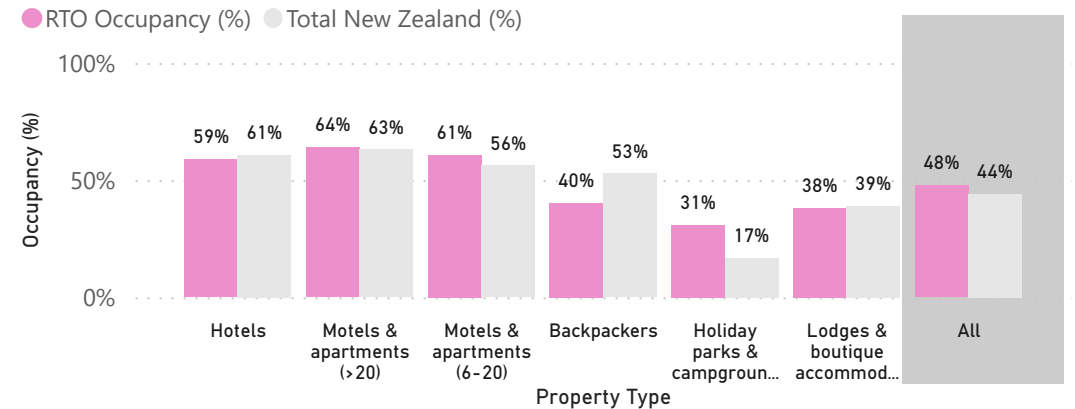
Occupancy Rate by Month



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 TA Level Summary - Taupo - Month Ending 30 Jun'23



Select RTO
Taupo

Select TA
All

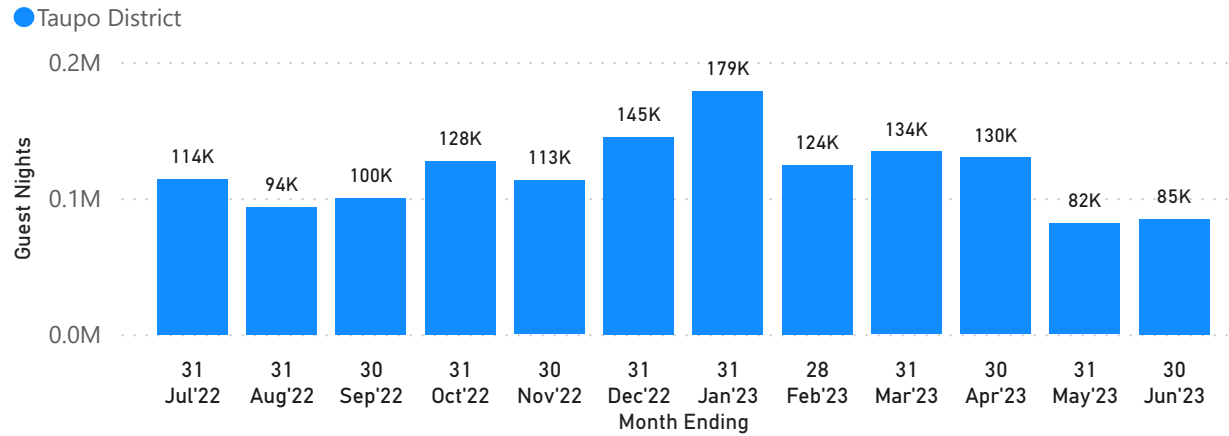
46.9K
Total Guest Arrivals
▲3.1% Guest Arrivals MoM Change
▲3.1% Guest Arrivals YoY Change

84.7K
Total Guest Nights
▲3.9% Guest Nights MoM Change
▼-3.1% Guest Nights YoY Change

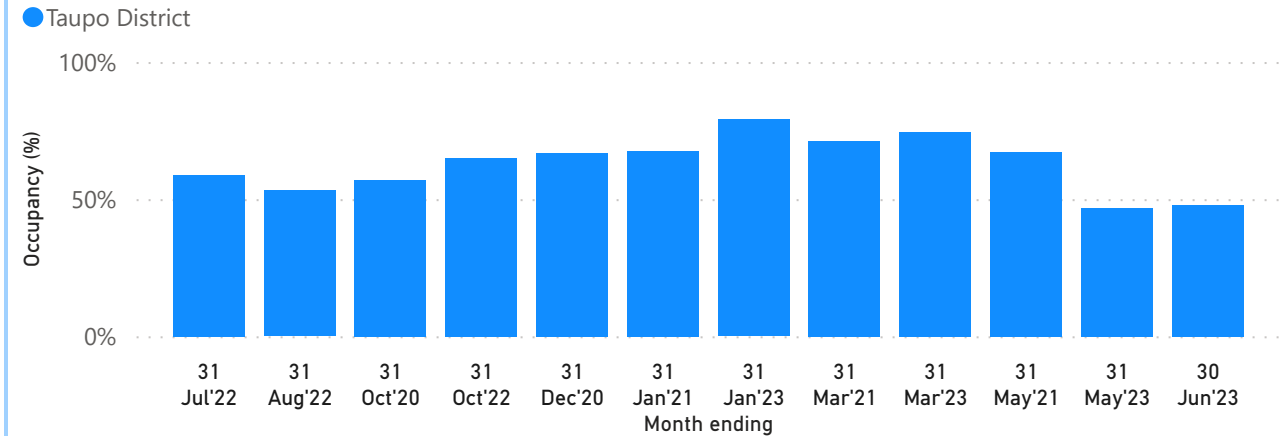


14.6%
% Guest Nights Intl.
47.8%
Occupancy
▲2.1% Occupancy MoM Change
▼-2.0% Occupancy YoY Change

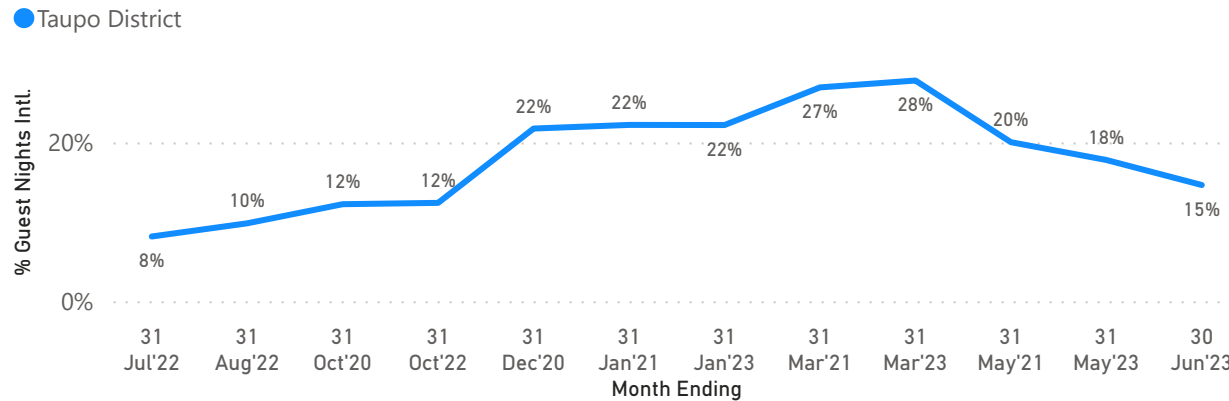
Total Guest Nights by TA



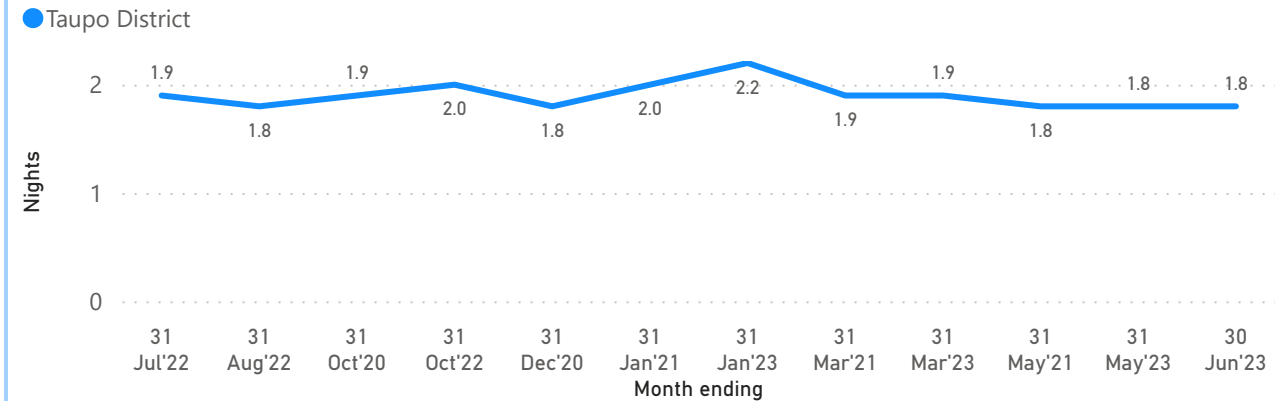
Monthly Average Occupancy Rate by TA



Proportion of Guest Nights International (%)



Average Nights Stayed per Guest



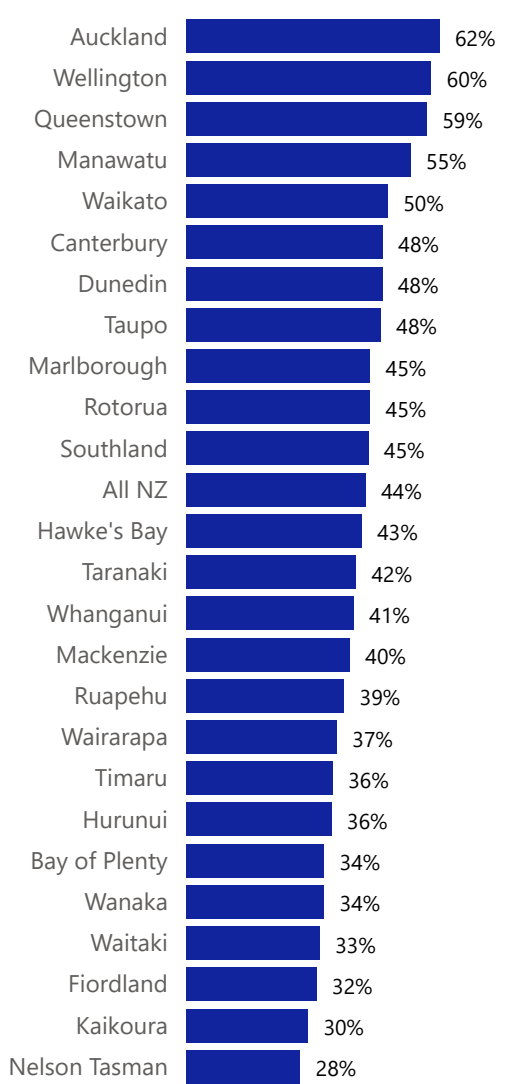
** MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month last year

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

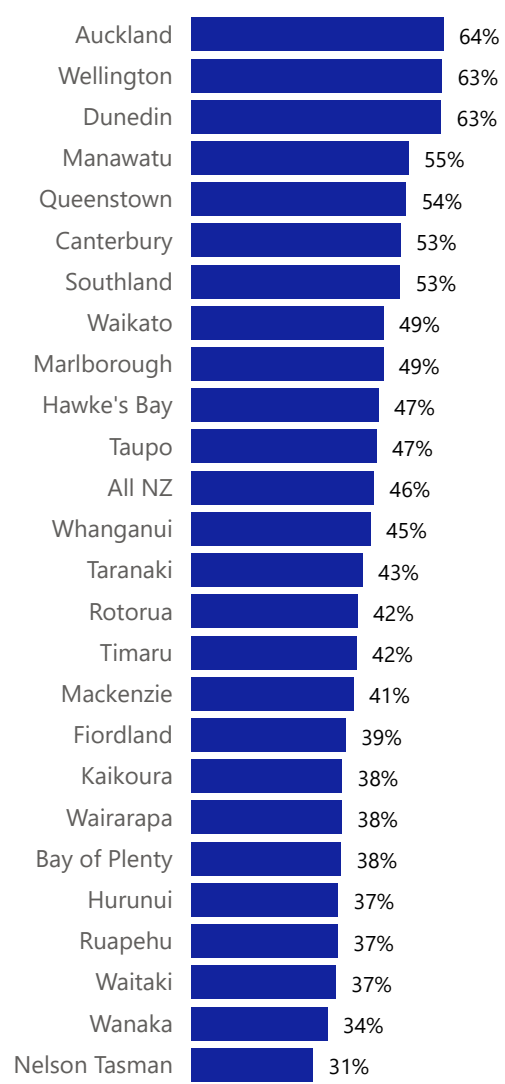
ADP Results - RTO Comparison - Month Ending 30 Jun'23



ADP Total Occupancy by RTO for the Month Ending 30 Jun' 23



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

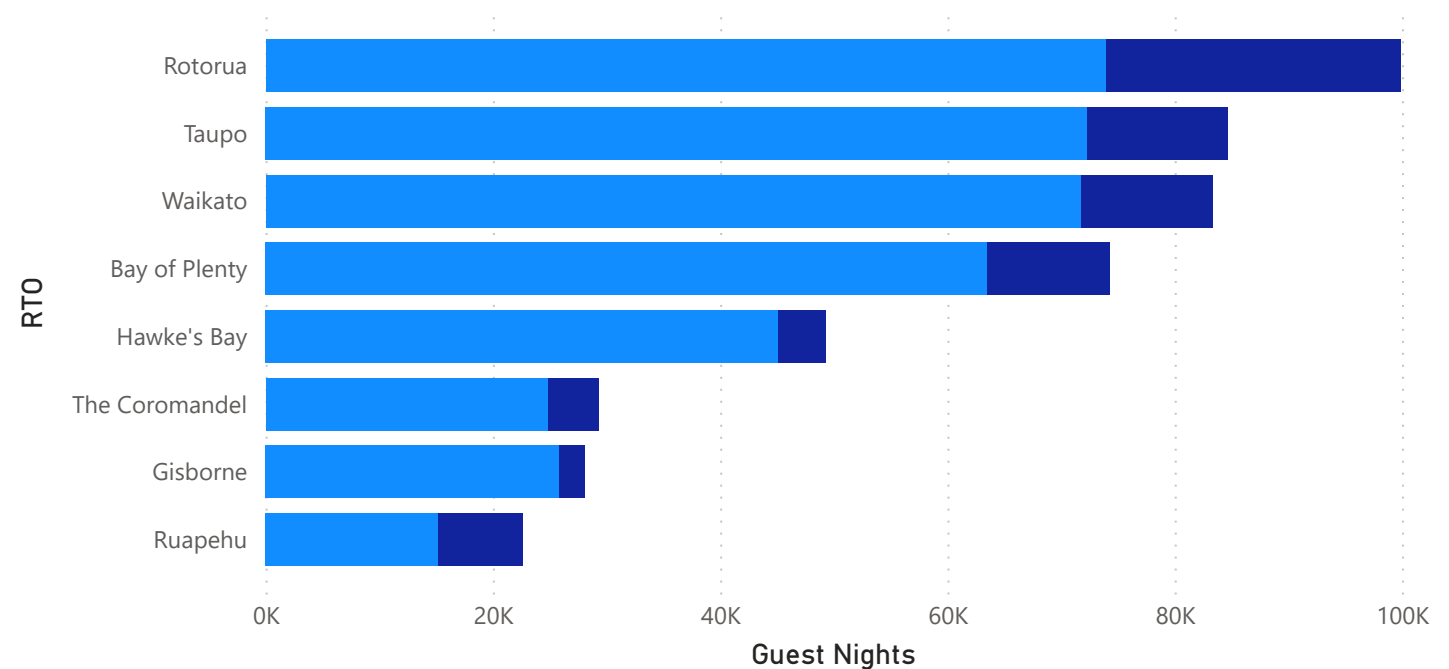


ADP Key Stats by CNI RTO for the Month Ending 30 June '23

Measure	Bay of Plenty	Gisborne	Hawke's Bay	Rotorua	Ruapehu	Taupo	The Coromandel	Waikato
Total guest nights	74,200.00	28,100.00	49,200.00	100,000.00	22,600.00	84,700.00	29,300.00	83,400.00
Proportion of international guests	0.15	0.08	0.09	0.26	0.33	0.15	0.15	0.14
Occupancy rate	0.34	0.26	0.43	0.45	0.39	0.48	0.18	0.50
Guest arrivals	31,400.00	11,600.00	20,000.00	45,700.00	11,800.00	46,900.00	13,000.00	41,600.00
Average nights stayed per guest	2.40	2.40	2.50	2.20	1.90	1.80	2.30	2.00

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

Measure ● Domestic guest nights ● International guest nights

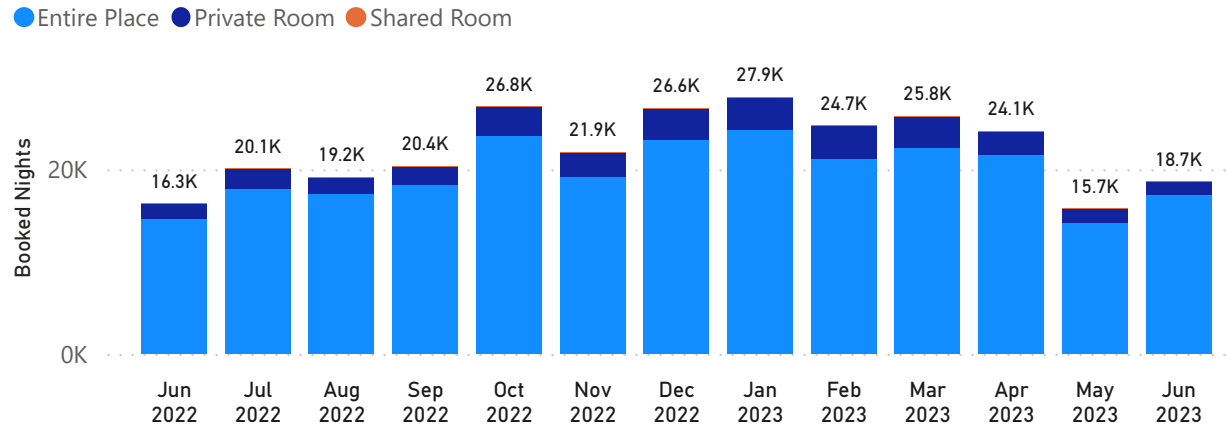


Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions:** MoM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

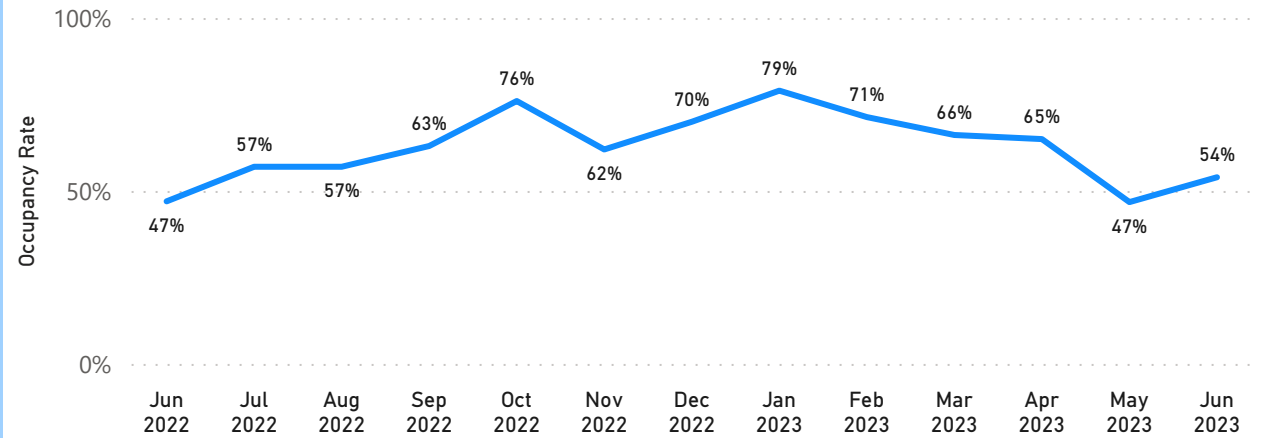


18.7K Booked Nights	▲18.7% Booked Nights MoM ▲14.6% Booked Nights YoY	1.5K Active Listings	▲0.2% Active Listings MoM ▲0.6% Active Listings YoY	\$3.4M Monthly Revenue	▲19.0% Revenue MoM ▲15.9% Revenue YoY	54% Monthly Occupancy	▲15.3% Occupancy MoM ▲14.8% Occupancy YoY
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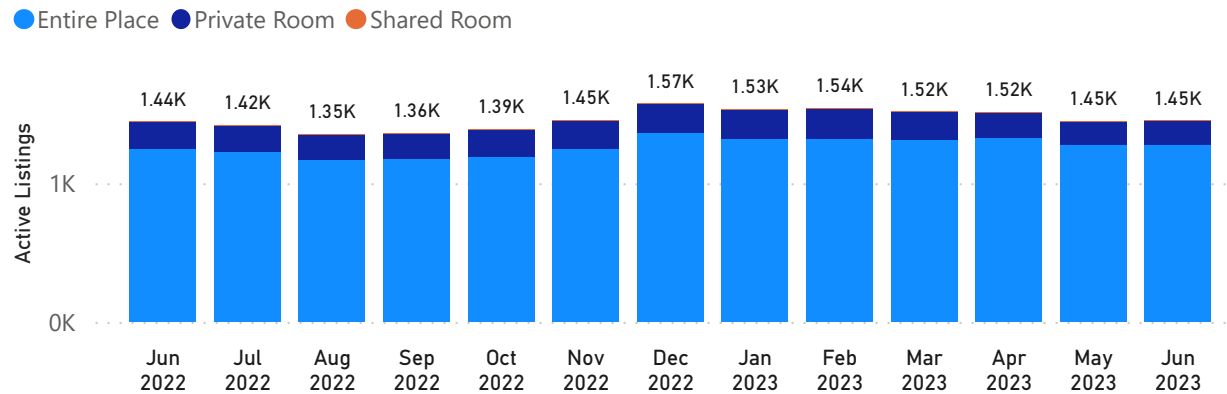
Monthly Demand (Booked Nights) by Listing Type



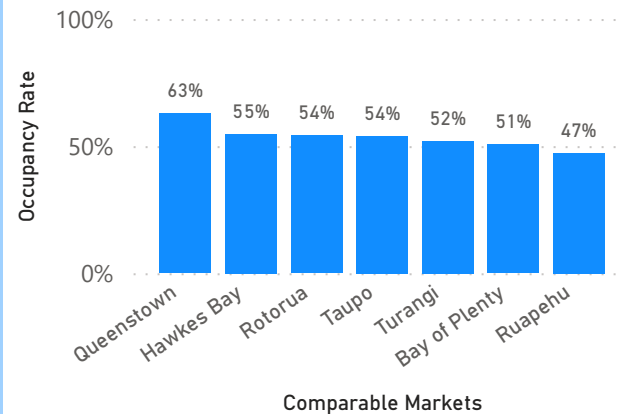
Monthly Occupancy Rate



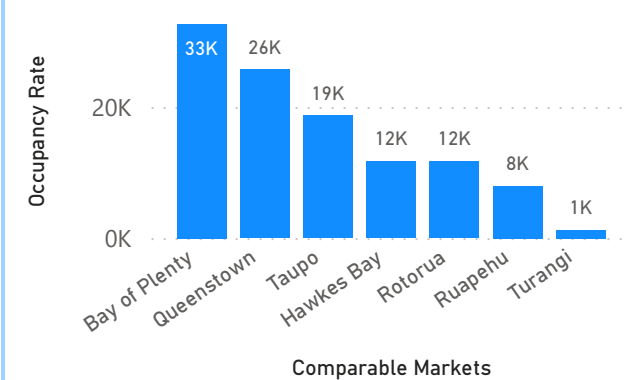
Monthly Active Listing Count by Type



Occupancy vs. Sub-markets - Jun'23



Booked Nights vs. Sub-markets - Jun'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



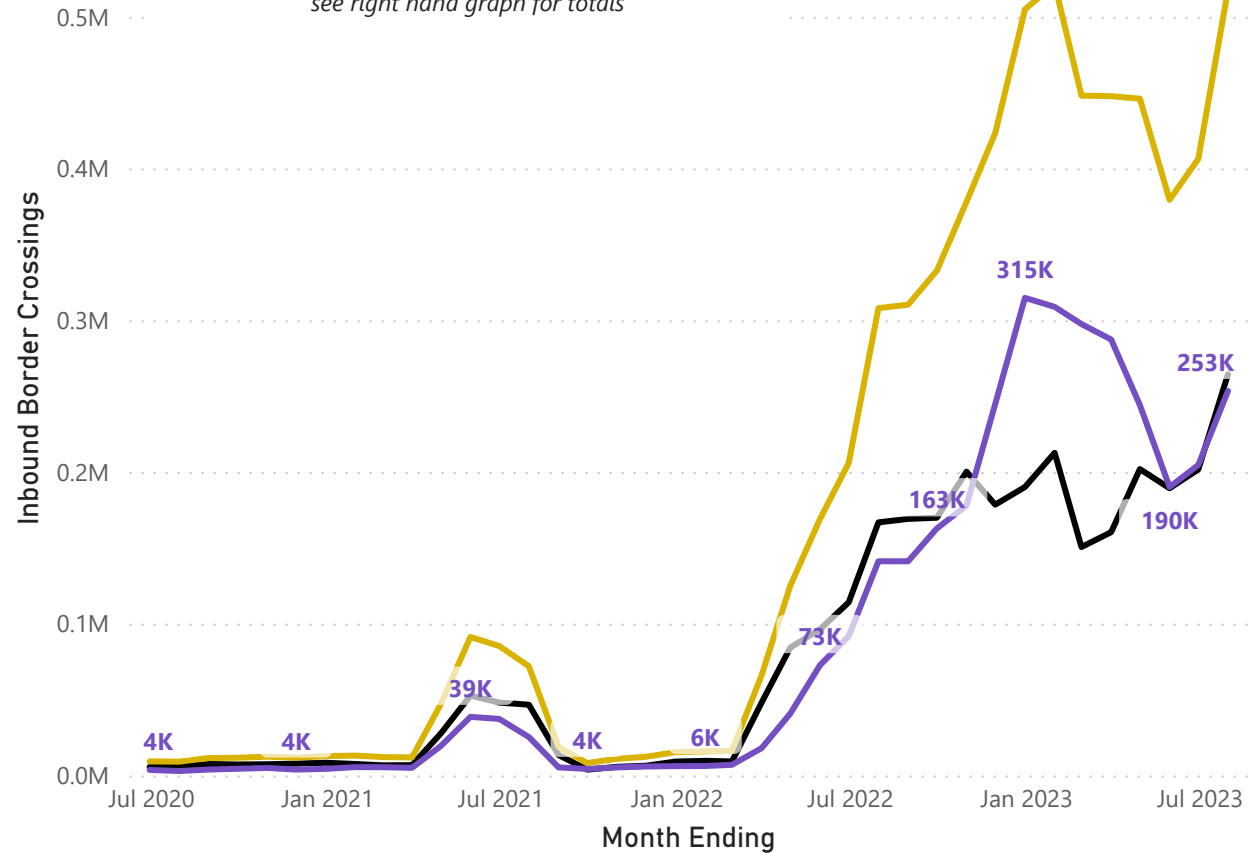
518K Total - Latest Month	▲27.4% Total MoM	253K International - Latest Month	▲23.8% Intl. MoM	264K Domestic - Latest Month	▲31.1% Dom. MoM
▲68% Total YoY		▲79% Int. YoY		▲59% Dom. YoY	

8/06/2020 31/07/2023 **Drag slider to focus date range**

Monthly Border Entries by Passport Type

Traveller Type ● New Zealand passport ● Other passports ● Total

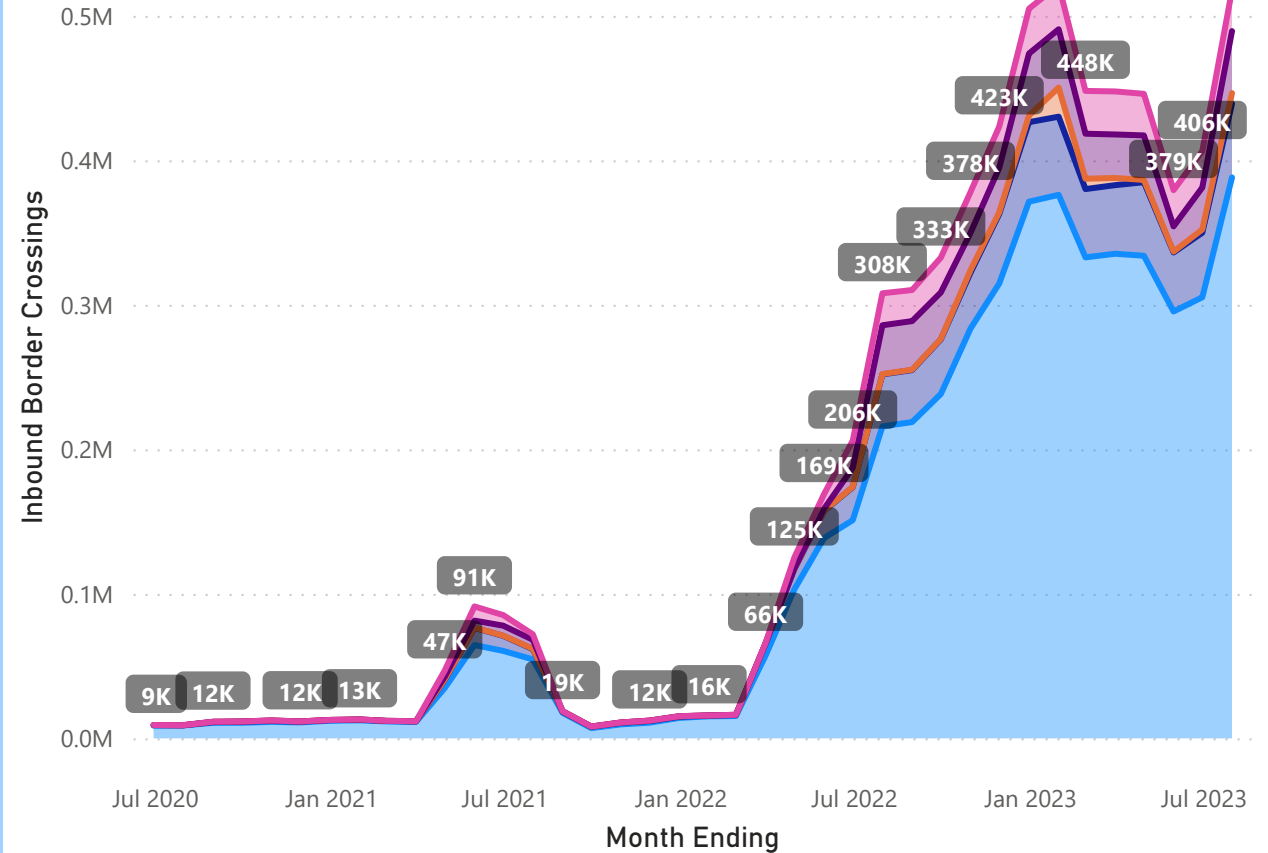
Note: Data labels relate to "Other passports" - hover over or see right hand graph for totals



Monthly Border Entries by Port of Arrival

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

Note: Data labels relate to totals



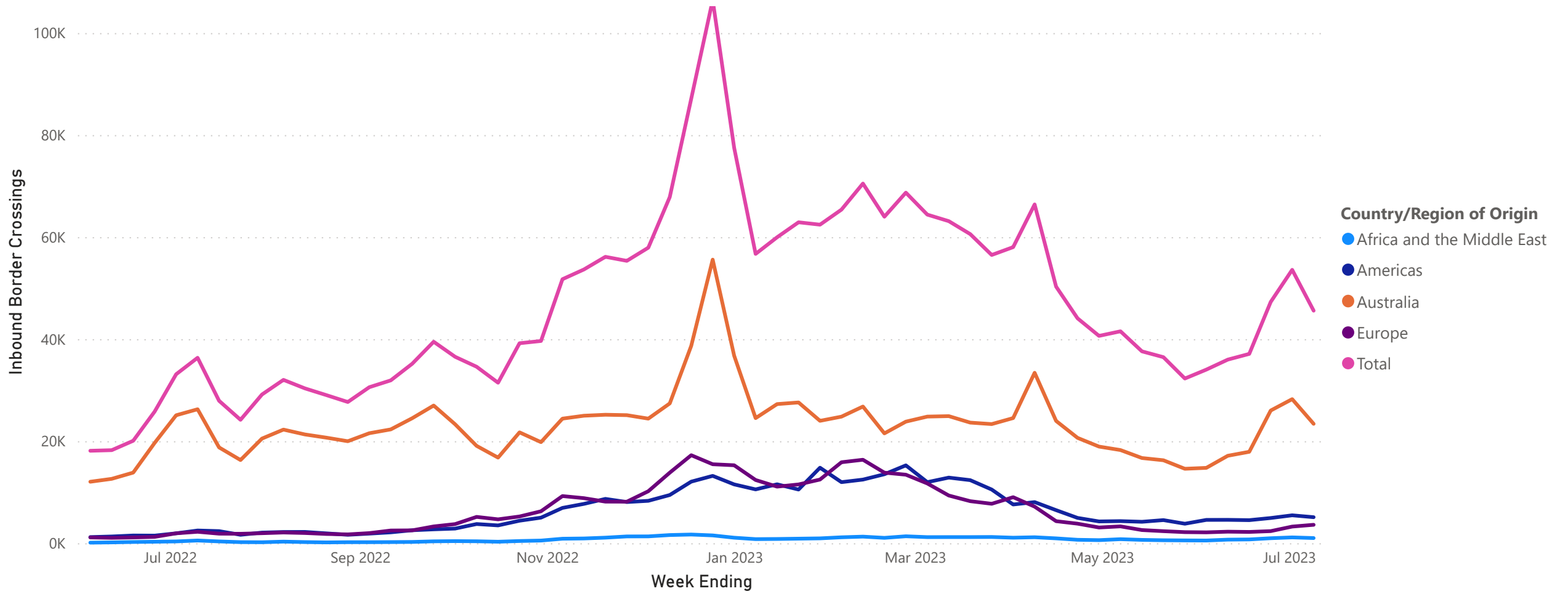
Border Entries by Visitor Origin - Provisional up to w/e 9/07/2023



Visitor Origin
 Travel Purpose
 Length of Stay
 1/06/2022 9/07/2023
 Drag slider to focus date range

Weekly Border Entries by Country / Region of Origin

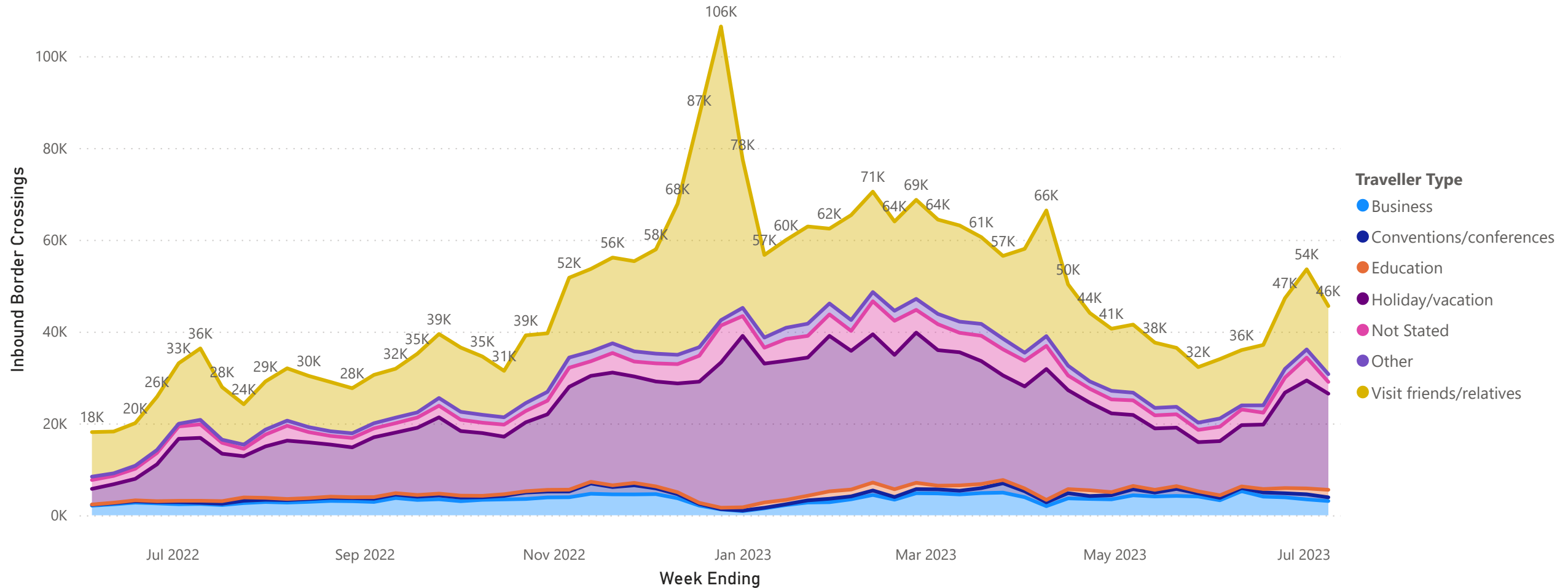
Use the "Visitor Origin" filter to view different regions. Note that categories are not mutually exclusive and hence together add up to great than the total (e.g. Germany is also counted with the Europe series)





Visitor Origin:
 Travel Purpose:
 Length of Stay:
 1/06/2022 - 9/07/2023
 Drag slider to focus date range

Weekly Border Entries by Trip Purpose



Border Entries by Length of Stay - Provisional up to w/e 9/07/2023



Visitor Origin:
 Travel Purpose:
 Length of Stay:

1/06/2022 9/07/2023

Drag slider to focus date range



Weekly Border Entries by Length of Stay

