

March '23 Destination Insights Report

Prepared for Destination Great Lake Taupo

[About & Definitions](#)

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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 Due to this limitation the coverage can be different for each area / accommodation type and some numbers may not be published to protect confidentiality of submitters.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.

Visitation Data (Data Ventures) - Taupo - Month Ending 31 Mar'23

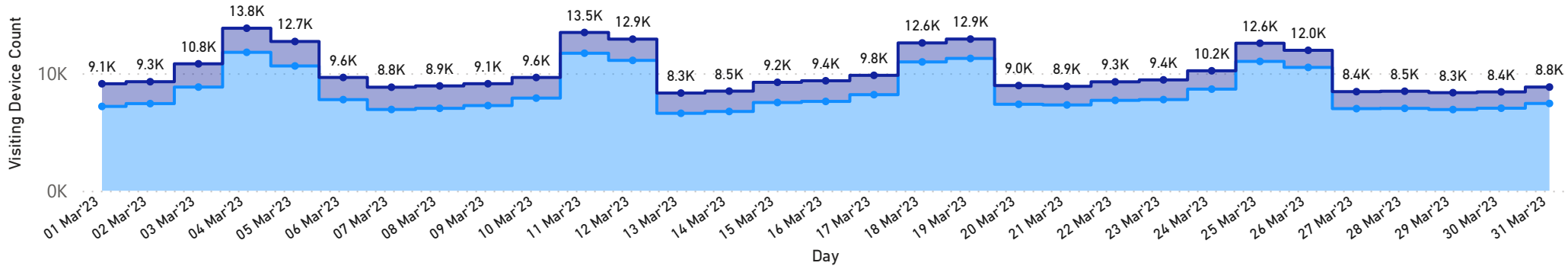


Select RTO
Taupo

312.7K Total Visitor Days (Month)	1.8% Market Share – Visitor Days	▲4.5% Visitor Days - MoM Change	▲21.5% Visitor Days - National MoM	10.1K Daily Average (Latest Month)	13833 Max Daily Visitor #	16.9% % International
15 RTO Rank - Visitor Days	▲30.7% Visitor Days - YoY Change	▲57.3% Visitor Days - National YoY		8316 Min Daily Visitor #		

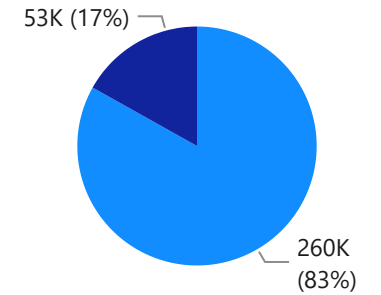
Daily Visitor Count (12 midday snapshot) - Mar'23

● Domestic ● International



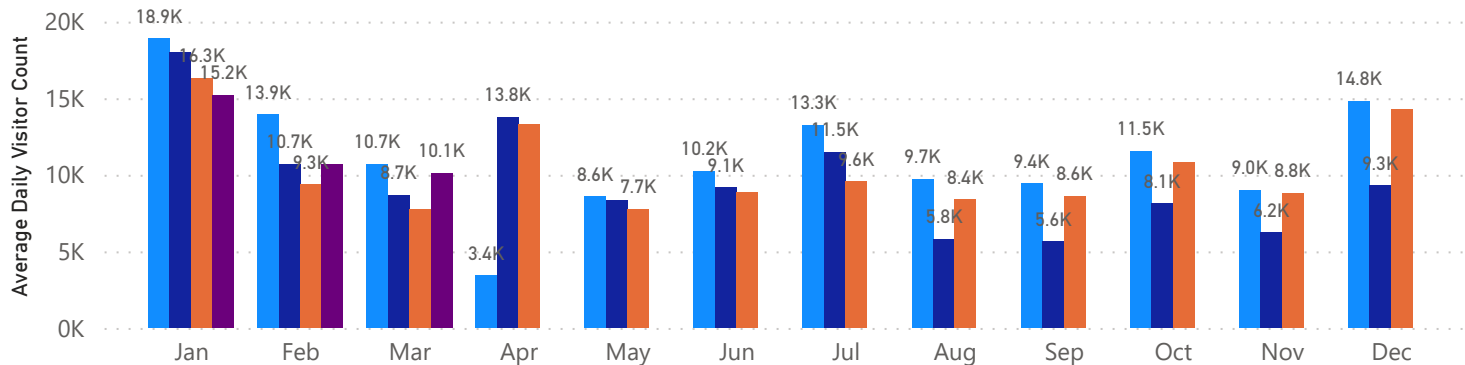
Total Visitor Days – Domestic vs. International

● Domestic ● International

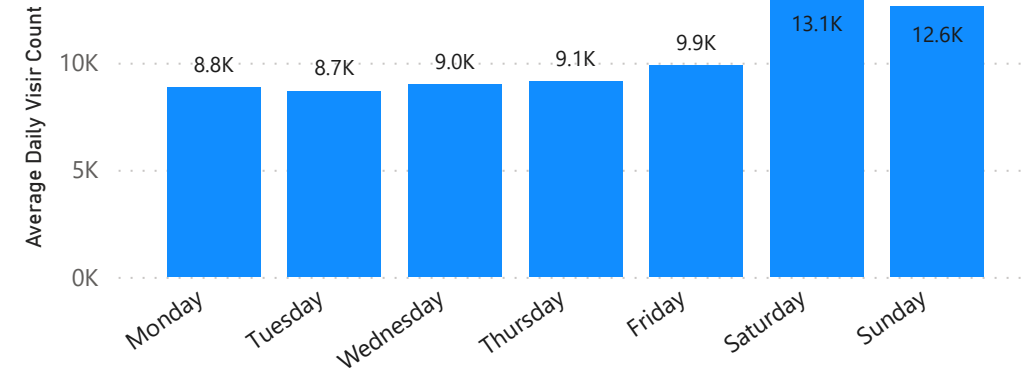


Average Daily Visitor Count by Month

Year ● 2020 ● 2021 ● 2022 ● 2023



Average Daily Visitor Count for Mar'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 31 Mar'23



Select RTO
Taupo

\$25.5M
Spend - Latest Month

2.7%
Latest month market share


10
Rank spend by RTO

▲3.8%
Spend - MoM Change

▲6.9%
Spend - YoY Change

▼-15.6%
National Spend - MoM Change

▲17.1%
National Spend - YoY Change

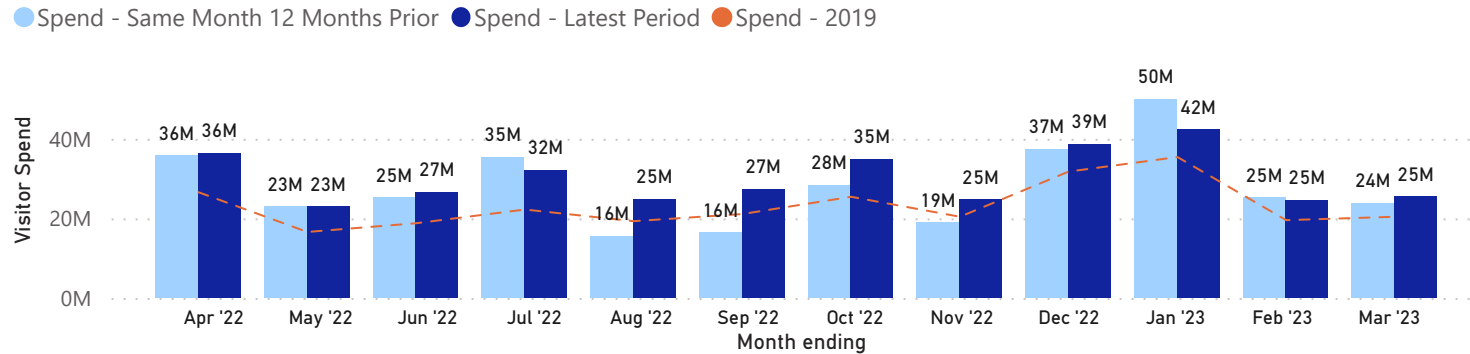


\$360.6M
Spend - Last 12 Month

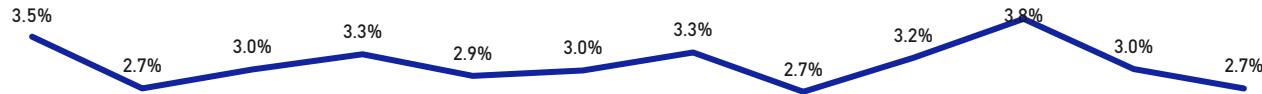
▲8%
Spend - Last 12 Months YoY

▲10.2%
National 12 Month YoY Change

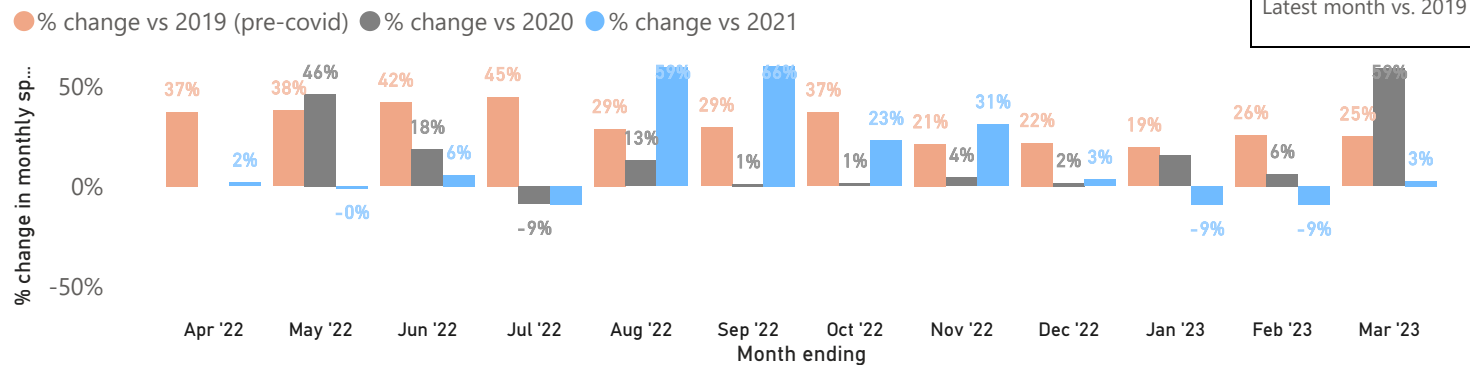
Captured Monthly Visiting Cardholder Spend (NZ \$)



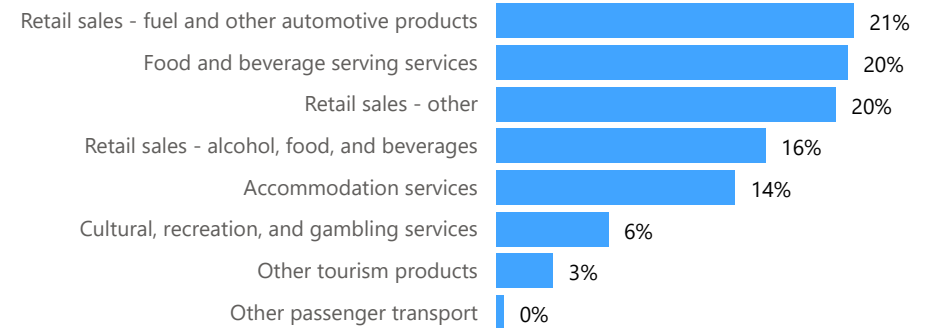
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

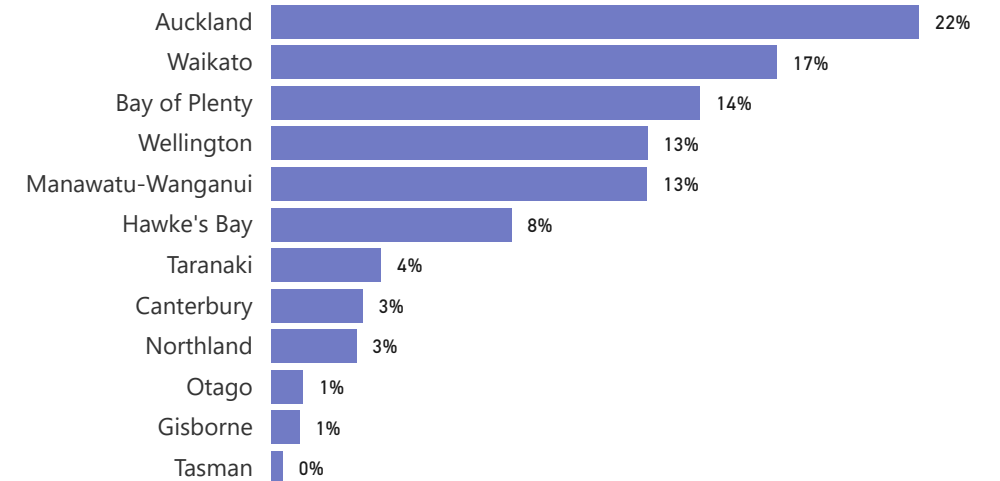


Last Month % TECT Visitor Spend by ANZSIC Product Category



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

\$8.7M
Spend - Latest Month

2.1%
Latest month market share


13
Rank spend by RTO

▼ -5.9%
Spend - MoM Change

▲979.3%
Spend - YoY Change

▲1.9%
National Spend - MoM Change

▲582.1%
National Spend - YoY Change

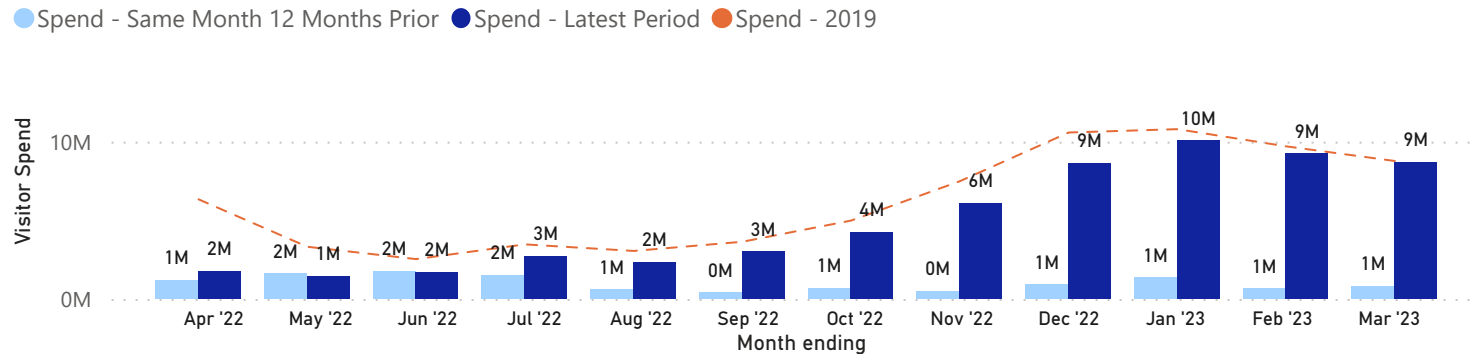


\$59.9M
Spend - Last 12 Month

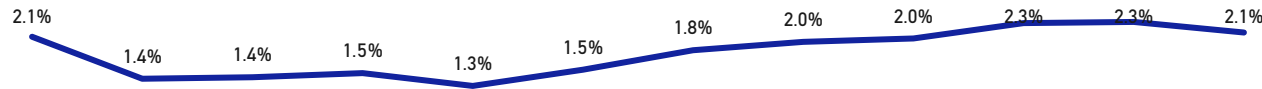
▲402%
Spend - Last 12 Months YoY

▲21.7%
National 12 Month YoY Change

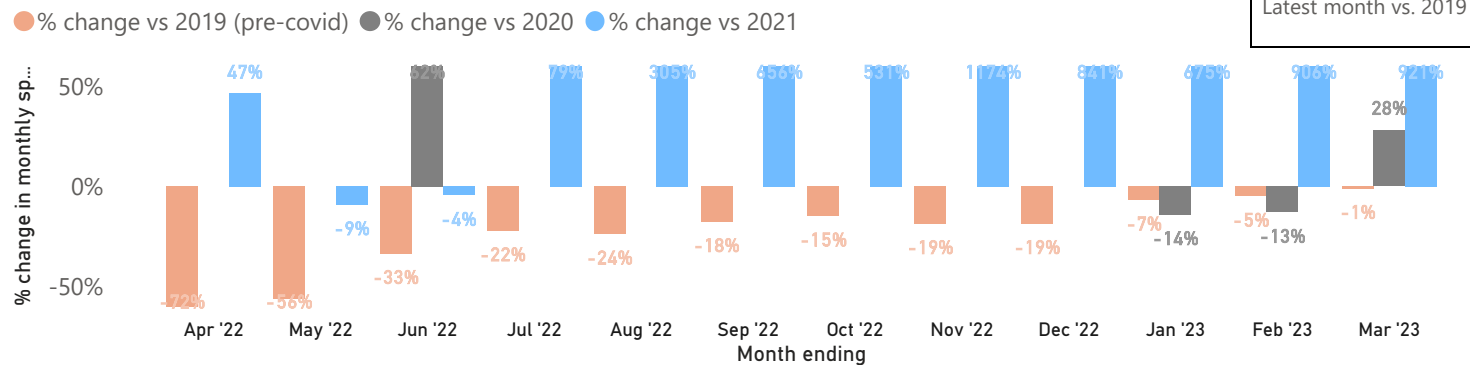
Captured Monthly Visiting Cardholder Spend (NZ \$)



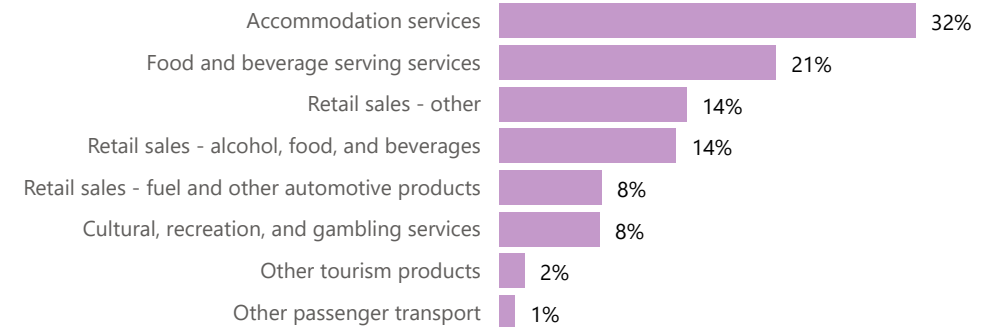
Market Share - Latest Period (%)



Change in Spend vs. the Same Month in Previous Years

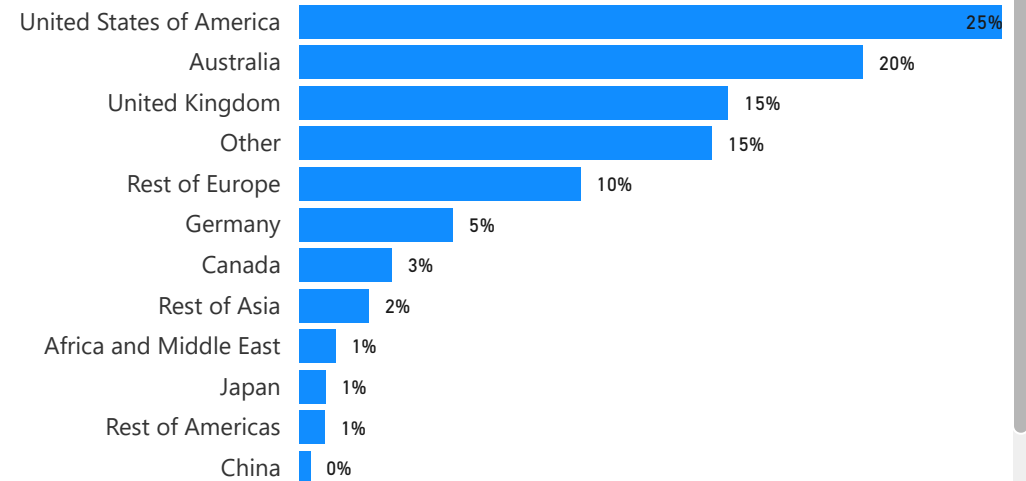


Last Month % TECT Visitor Spend by ANZSIC Product Category



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 31 Mar'23



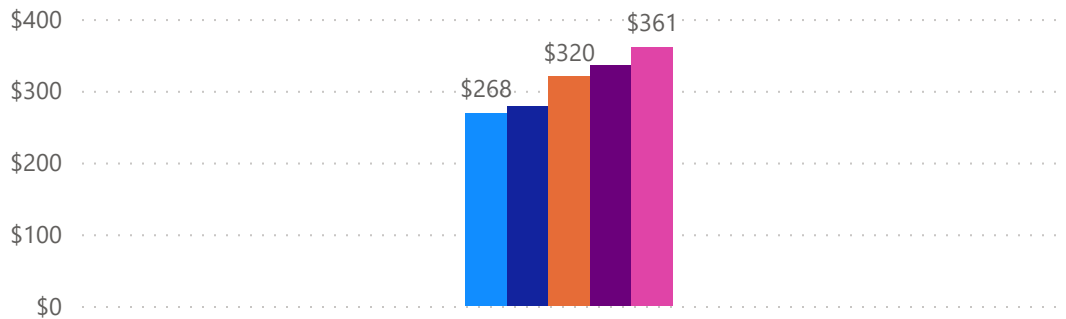
Select RTO ▼
 Taupo ▼

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

\$360.6
 ▲ 7.7% YoY Change

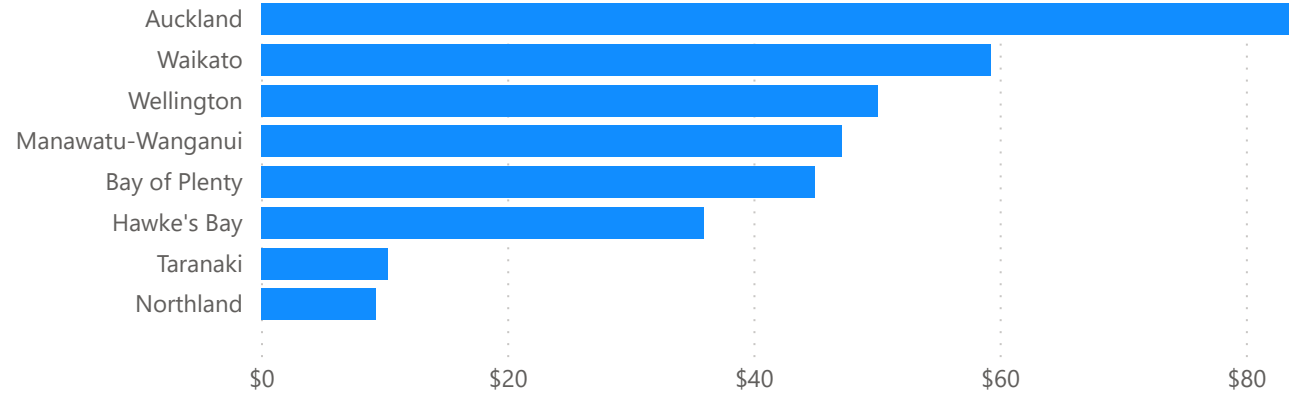
3.1% Market Share (12 Months)
 10 RTO Rank

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



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

(Scroll down to see all regions)

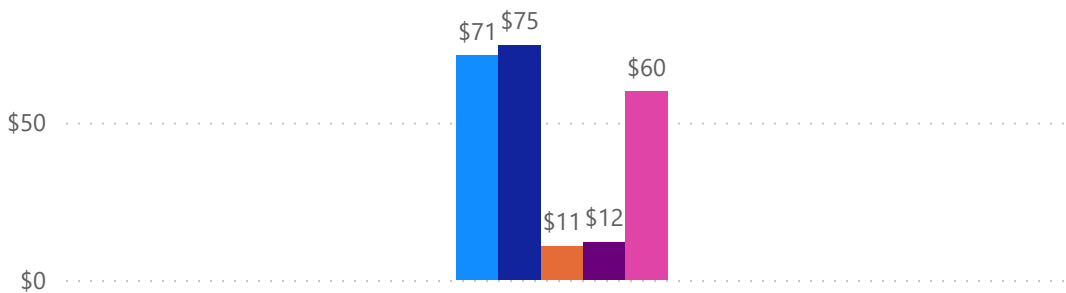


Total International Spend (\$M) - YE Mar '23

\$59.9
 ▲ 401.5% YoY Change

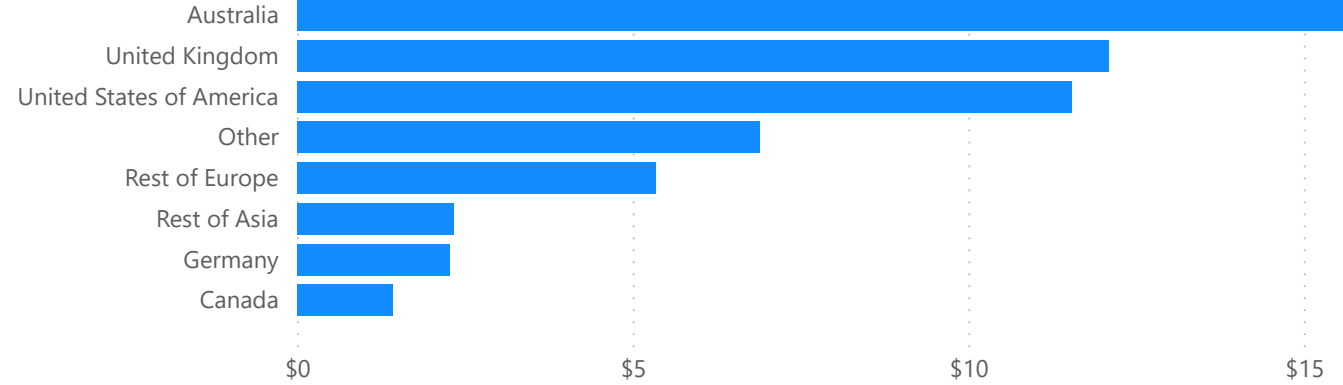
1.9% Market Share (12 Months)
 14 RTO Rank

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



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

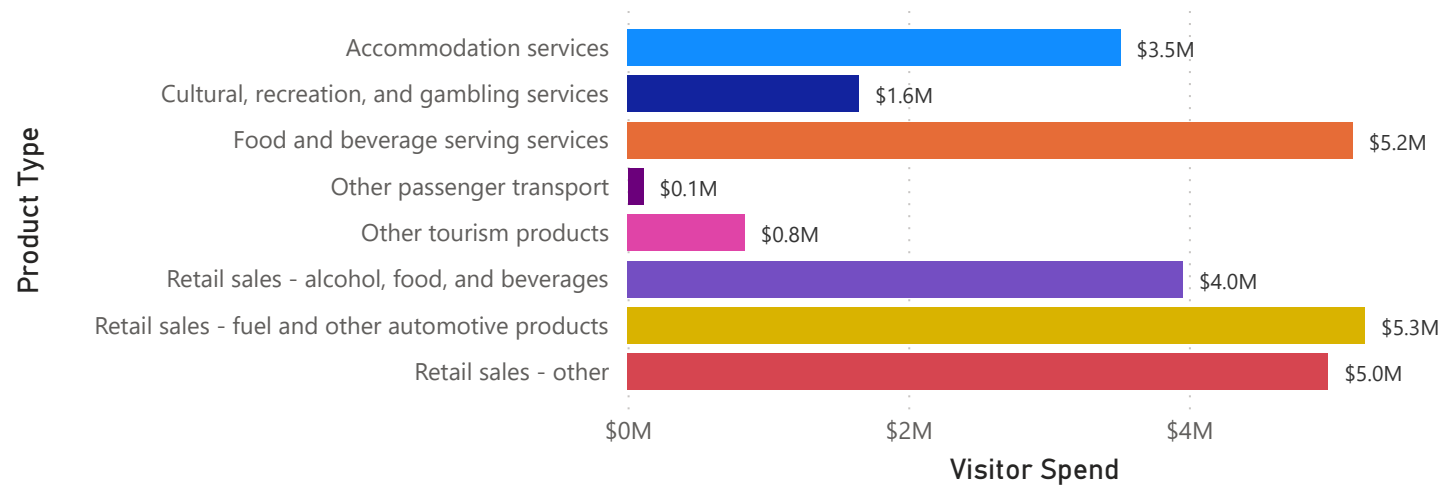
Definitions: MoM (Month on Month Change) - Compares reported month to previous month | YoY (Year on Year Change) - Compares reported month to same month of the previous year | YE (Year Ending) - Sum of the 12 months up to

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



Select RTO ▼
 Taupo ▼

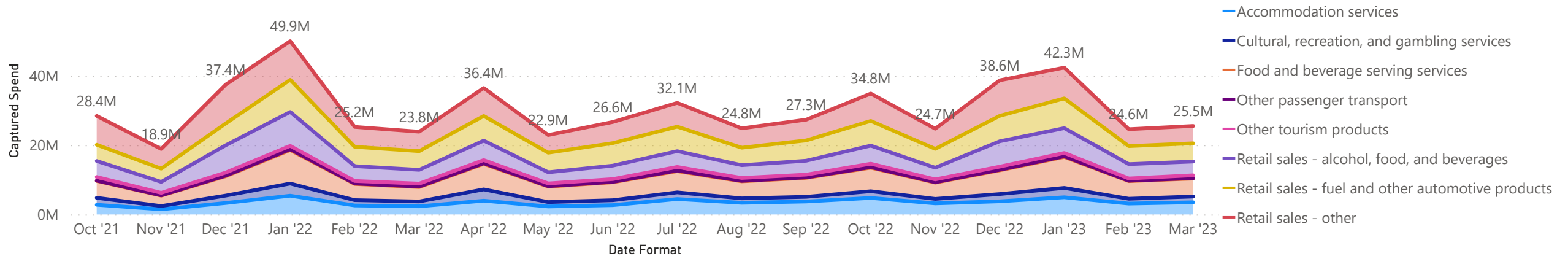
Visitor Spend By ANZSIC Product Category (NZ\$) - Mar'23



Change in Spend vs. Previous Periods

Product	MoM	YoY	YoY 2019
Accommodation services	▲11.9%	▲49.8%	▲15.5%
Cultural, recreation, and gambling services	▲19.1%	▲17.8%	▲30.0%
Food and beverage serving services	▲1.9%	▲24.8%	▲32.0%
Other passenger transport	▲10.4%	▼-14.5%	▼-51.0%
Other tourism products	▲27.0%	▼-3.1%	▲19.2%
Retail sales - alcohol, food, and beverages	▼-4.3%	▼-0.2%	▲27.9%
Retail sales - fuel and other automotive products	▲1.3%	▼-2.3%	▲42.3%
Retail sales - other	▲2.6%	▼-10.9%	▲12.1%
Total	▲3.8%	▲6.9%	▲24.9%

Visitor Spend by ANZSIC Product Category (NZ\$)



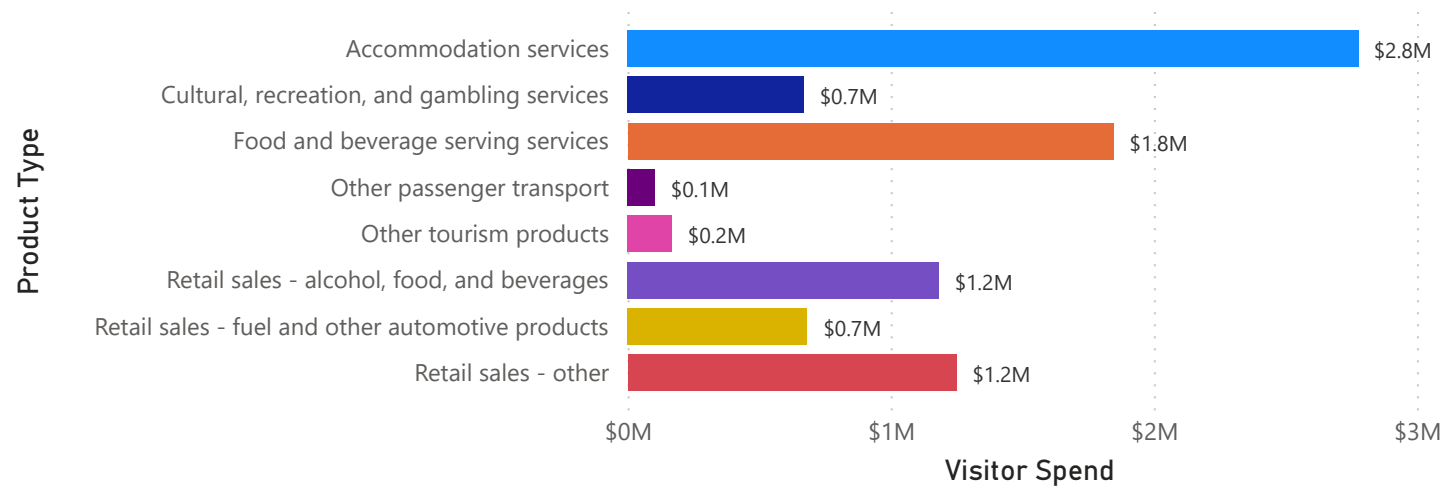
Note: Data represents electronic card transactions made in region and does not account for or estimate online transactions, direct transfers and cash. Data for international and domestic spending is collected differently and the two figures should not be totalled to a 'total spend' **Definitions:** MoM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



Select RTO ▼
 Taupo ▼

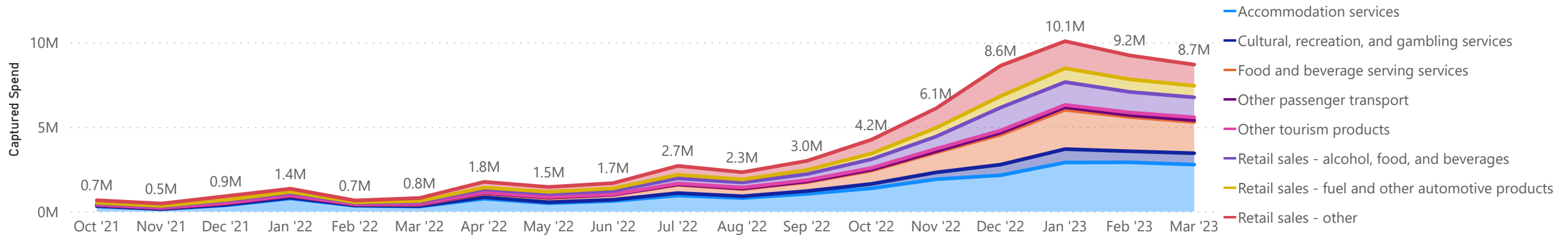
Visitor Spend By ANZSIC Product Category (NZ\$) - Mar'23



Change in Spend vs. Previous Periods

Product	MoM	YoY	YoY 2019
Accommodation services	▼ -4.6%	▲821.2%	▼ -14.0%
Cultural, recreation, and gambling services	▲2.7%	▲2743.0%	▼ -28.1%
Food and beverage serving services	▼ -8.9%	▲2112.4%	▲37.1%
Other passenger transport	▼ -3.2%	▲425.7%	▼ -70.1%
Other tourism products	▲10.4%	▲775.0%	▲36.8%
Retail sales - alcohol, food, and beverages	▼ -2.9%	▲866.4%	▲29.8%
Retail sales - fuel and other automotive products	▼ -8.2%	▲1170.5%	▼ -6.2%
Retail sales - other	▼ -11.4%	▲592.0%	▲8.8%
Total	▼ -5.9%	▲979.3%	▼ -1.0%

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 in Taupo RTO Area



Select RTO ▼

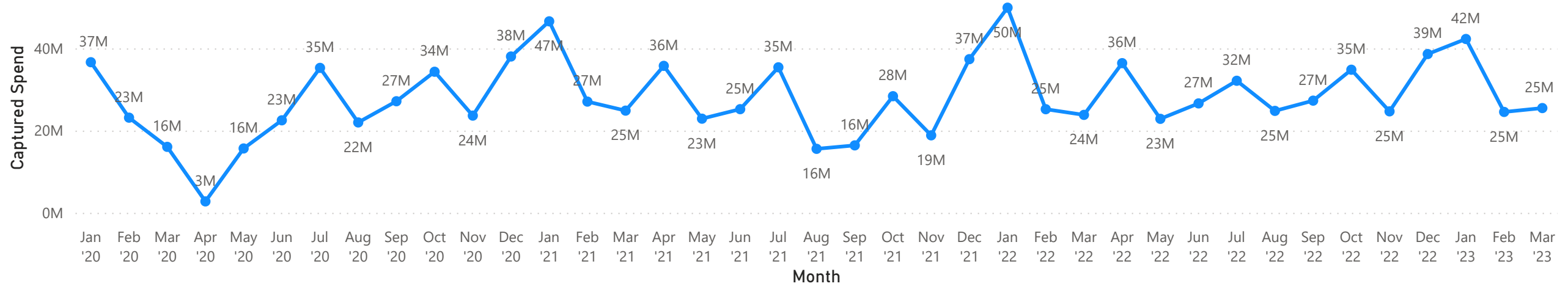
Taupo ▼

22/01/2020 31/03/2023

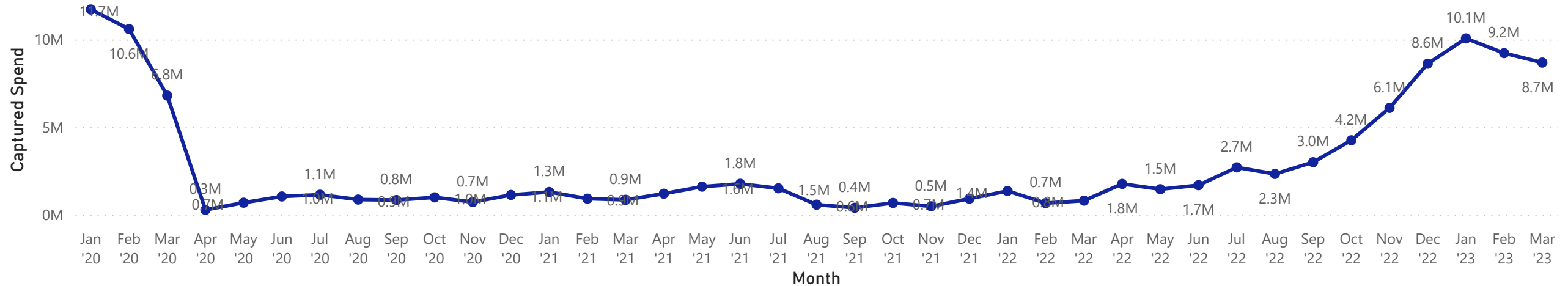
Drag slider to focus date range



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

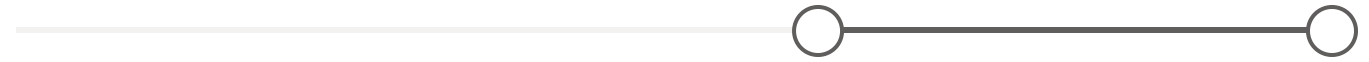


Select RTO
Taupo

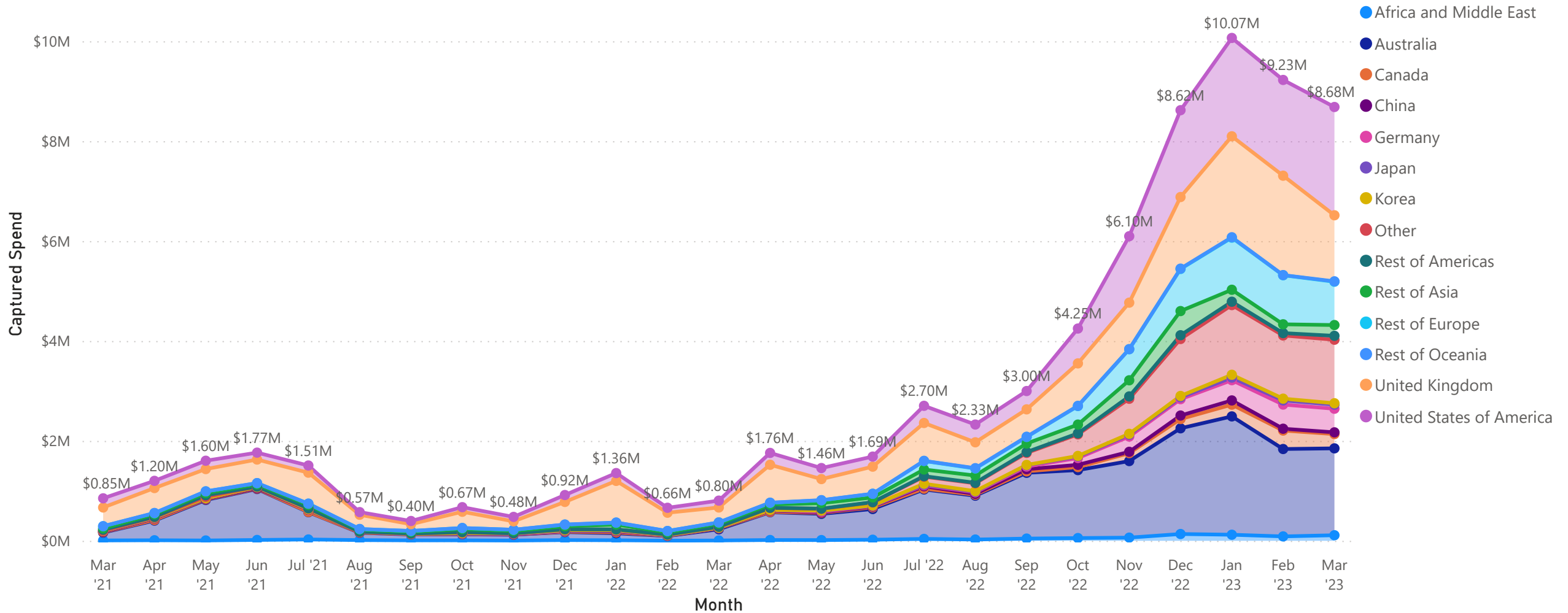
Select Visitor Origin
All

22/03/2021 31/03/2023

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

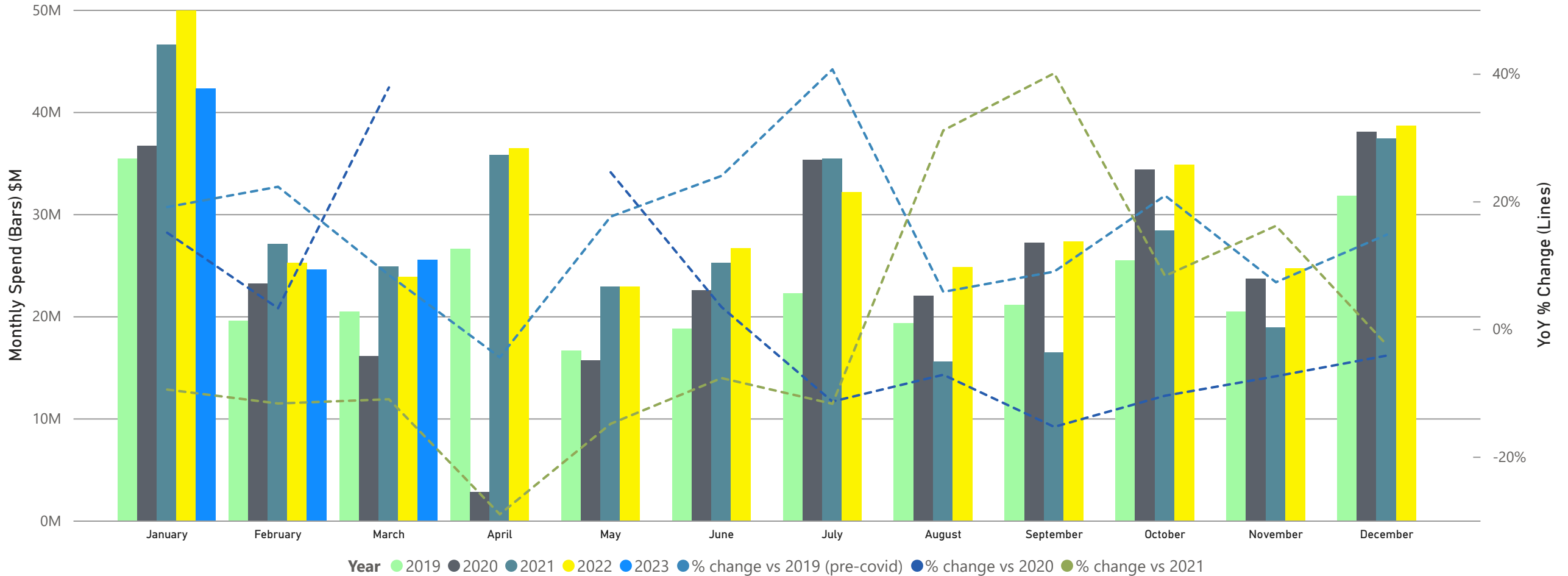
\$25.5M
Spend - Latest Month
▲3.8% MoM
▲6.9% YoY

2.7% Share
10 RTO Rank
▼-15.6% National MoM
▲17.1% National YoY



\$360.6M
Spend - Last 12 Month
▲8% YoY
▲10.2% National YoY

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 31 Mar'23



Select RTO
Taupo

Select Property Type
All

71.6K
Guest Arrivals (GA)
▲8.2% GA MoM Change
▲68.1% GA YoY Change

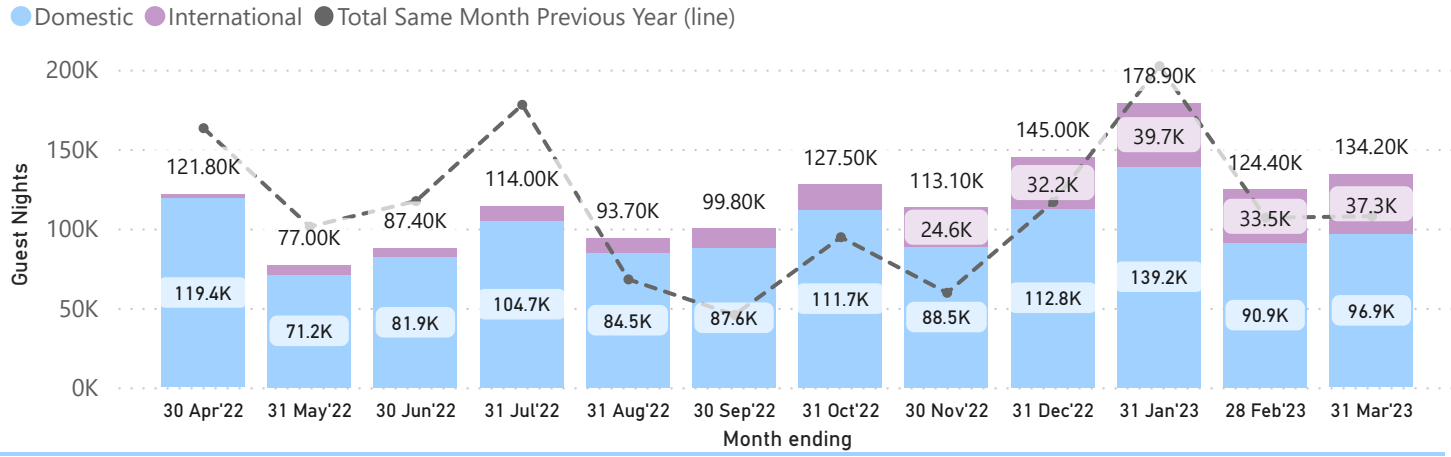
134.2K
Guest Nights (GN)
3.6% GN Market Share
10 GN Rank by RTO

▲7.9% GN MoM Change
▲69.9% GN YoY Change
▲6.7% GN - National - MoM
▲126.3% GN - National - YoY

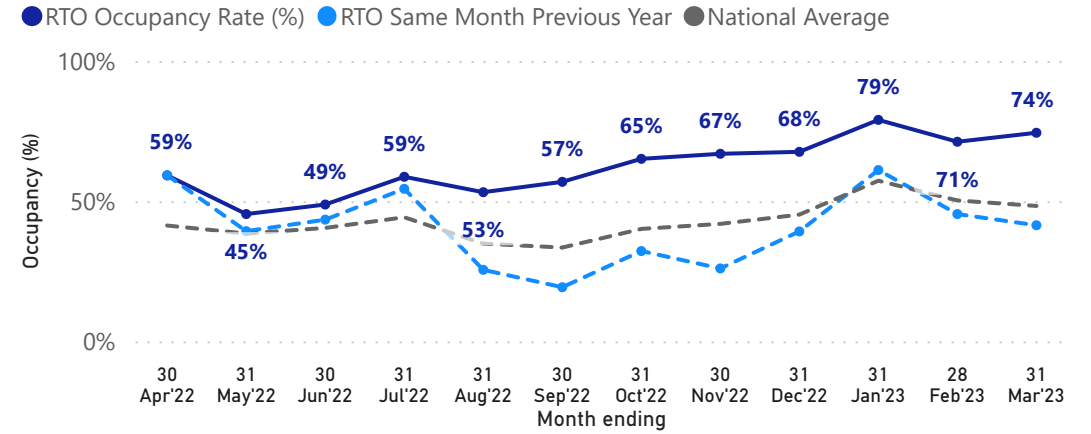


74.4%
Occupancy Rate (OR)
▲4.5% OR - MoM Change
▲79.7% OR - YoY Change

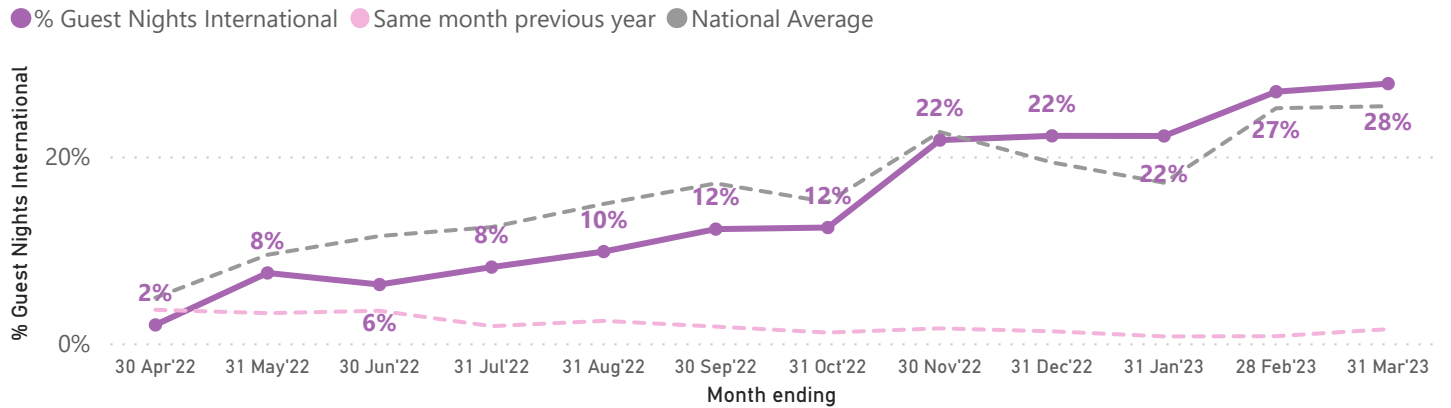
Total Guest Nights by Month



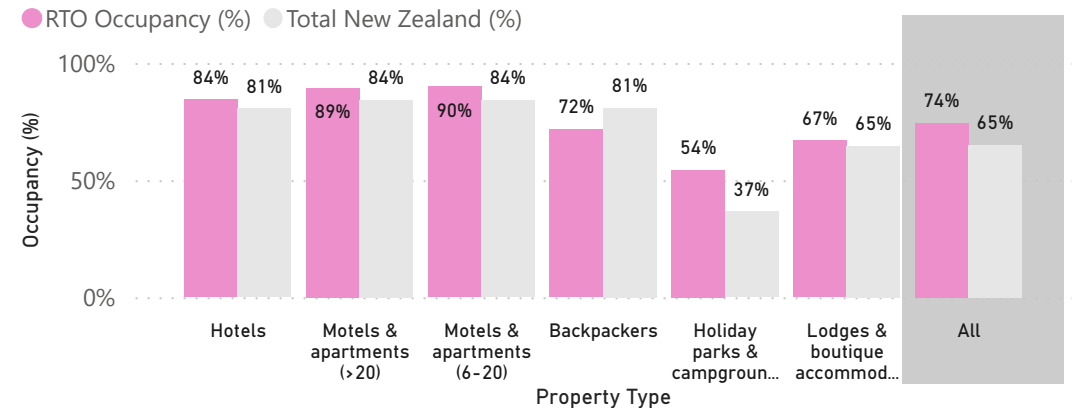
Occupancy Rate by Month



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 31 Mar'23



Select RTO
Taupo

Select TA
All

71.6K
Total Guest Arrivals
▲8.2% Guest Arrivals MoM Change
▲68.1% Guest Arrivals YoY Change

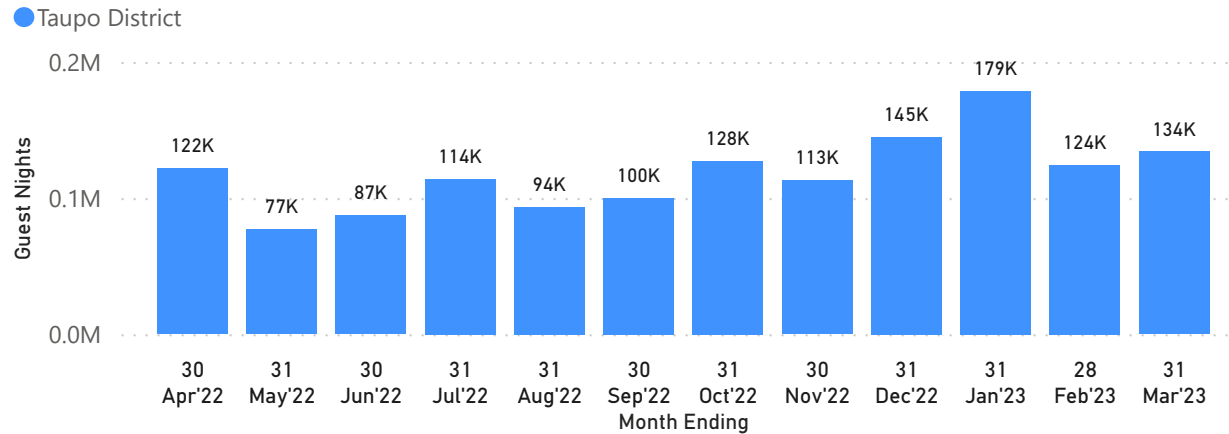
134.2K
Total Guest Nights
▲7.9% Guest Nights MoM Change
▲69.9% Guest Nights YoY Change



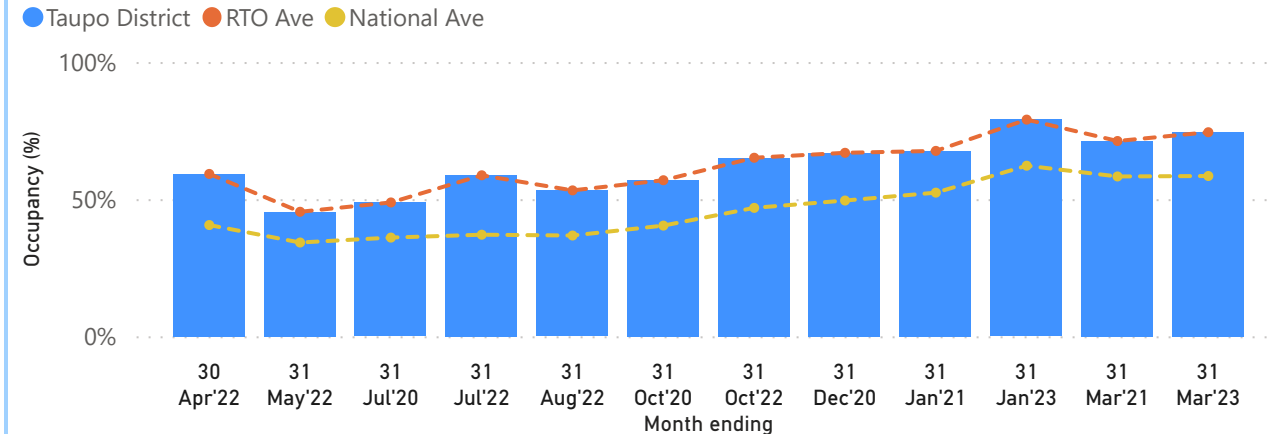
27.8%
% Guest Nights Intl.

74.4%
Occupancy
▲4.5% Occupancy MoM Change
▲79.7% Occupancy YoY Change

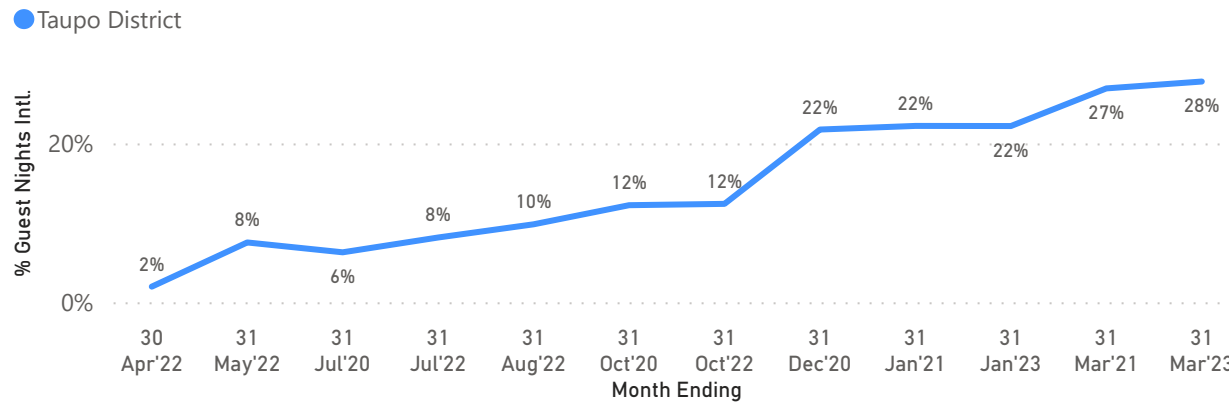
Total Guest Nights by TA



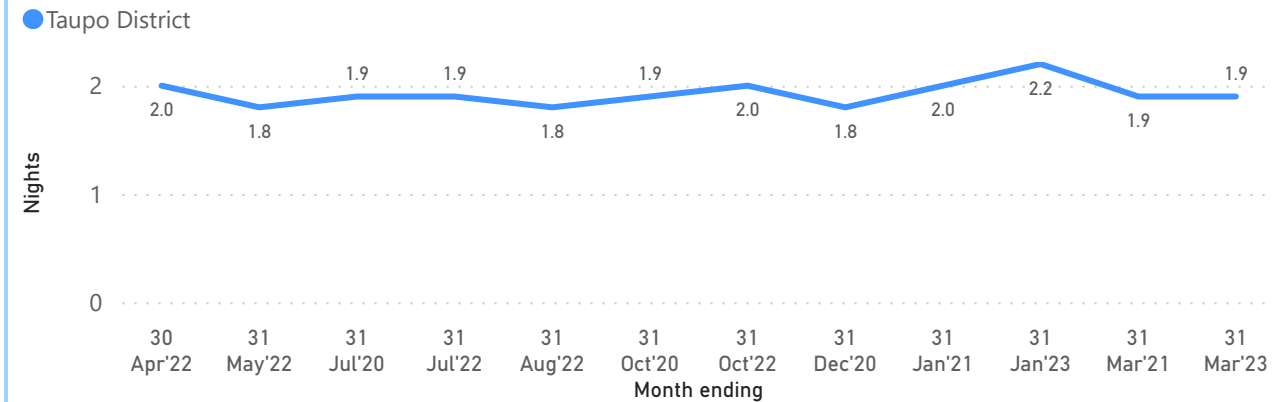
Monthly Average Occupancy Rate by TA



Proportion of Guest Nights International (%)



Average Nights Stayed per Guest



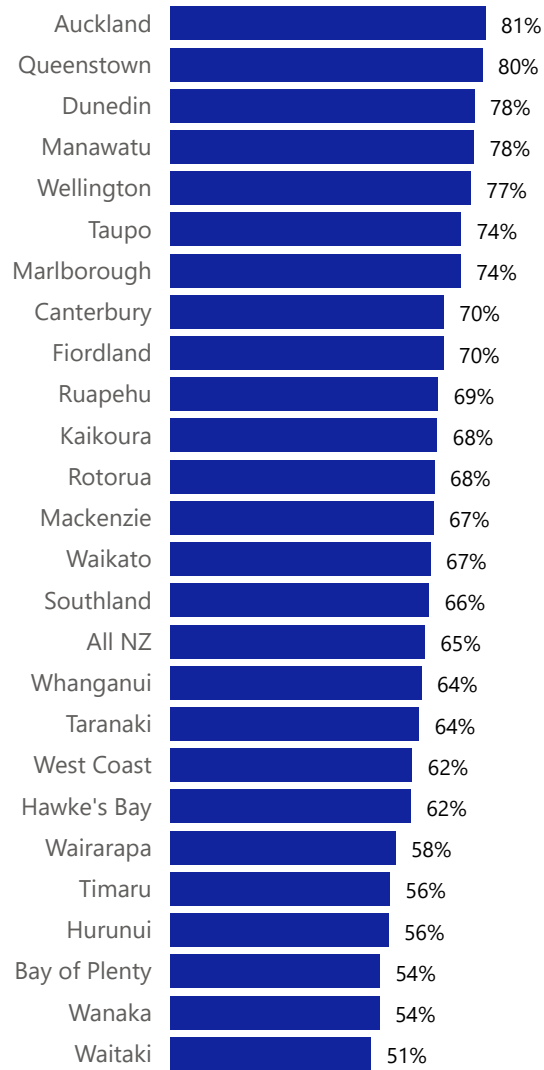
** MoM (Month on Month Change) - Compares reported month to previous month | **YoY (Year on Year Change) - Compares reported month to same month last year

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

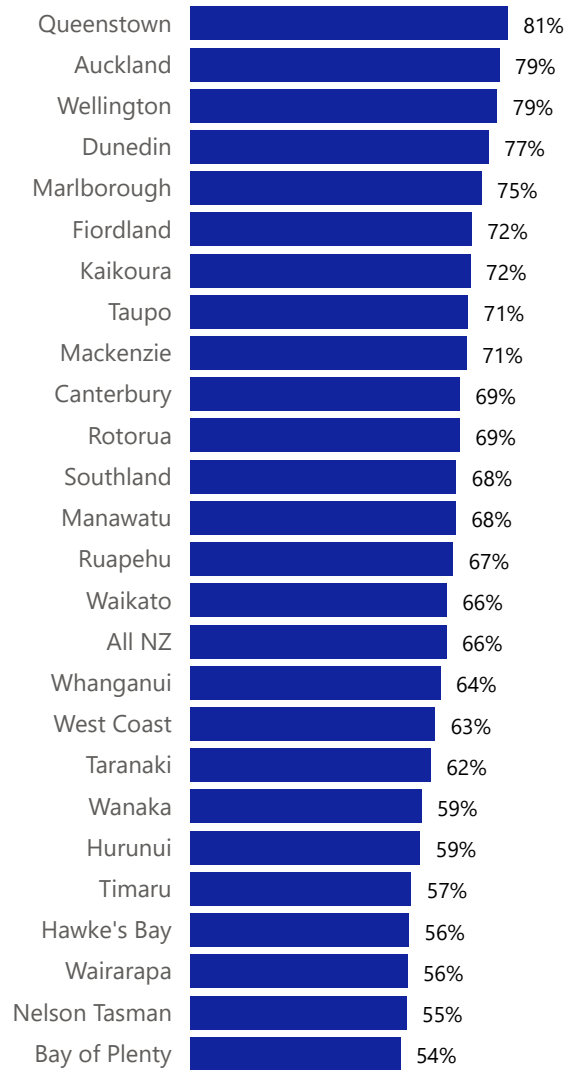
ADP Results - RTO Comparison - Month Ending 31 Mar'23



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



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

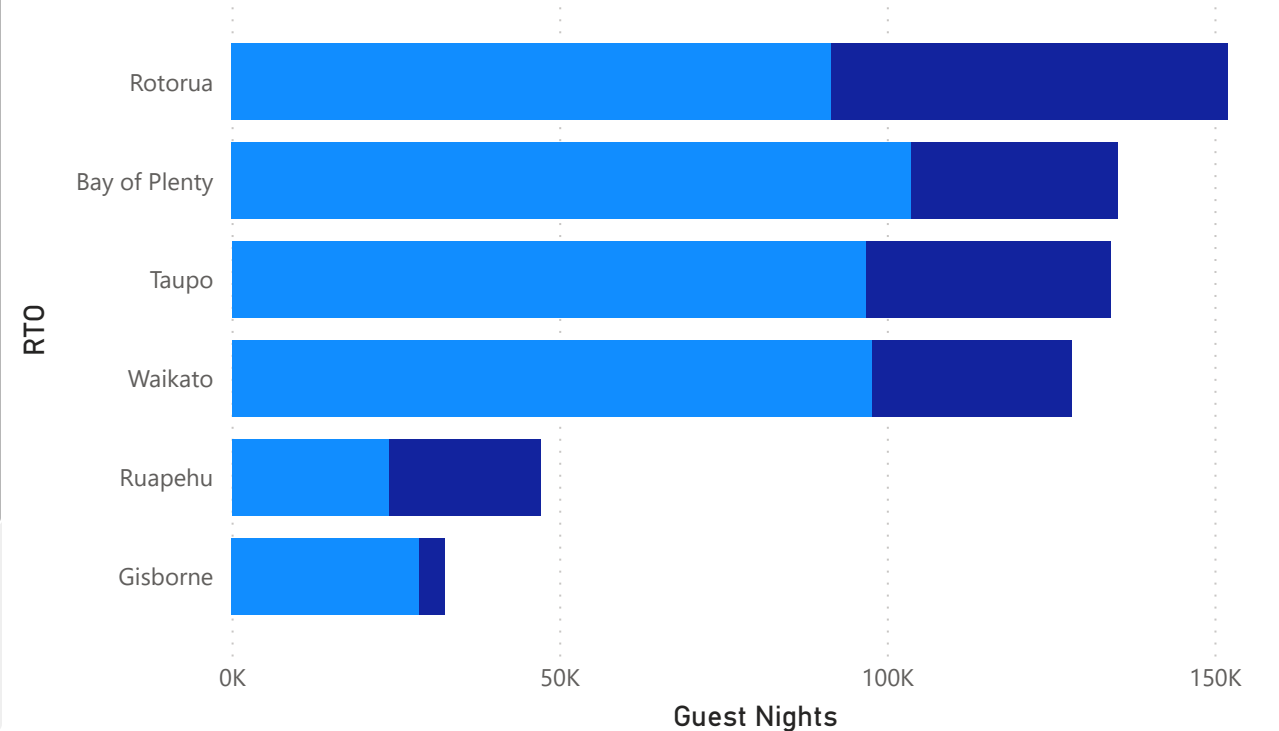


ADP Key Stats by CNI RTO for the Month Ending 31 Mar '23

Measure	Bay of Plenty	Gisborne	Rotorua	Ruapehu	Taupo	Waikato
Average nights stayed per guest	2.50	2.50	2.10	1.80	1.90	2.00
Guest arrivals	53,500.00	12,900.00	72,800.00	26,300.00	71,600.00	64,000.00
Occupancy rate	0.54	0.32	0.68	0.69	0.74	0.67
Proportion of international guests	0.23	0.12	0.40	0.49	0.28	0.24
Total guest nights	135,300.00	32,600.00	152,000.00	47,200.00	134,200.00	128,200.00

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



25.8K
Booked Nights

▲4.2%
Booked Nights MoM

▲102.4%
Booked Nights YoY

1.5K
Active Listings

▼ -1.5%
Active Listings MoM

▲3.1%
Active Listings YoY

\$4.8M
Monthly Revenue

▼ -1.0%
Revenue MoM

▲105.2%
Revenue YoY

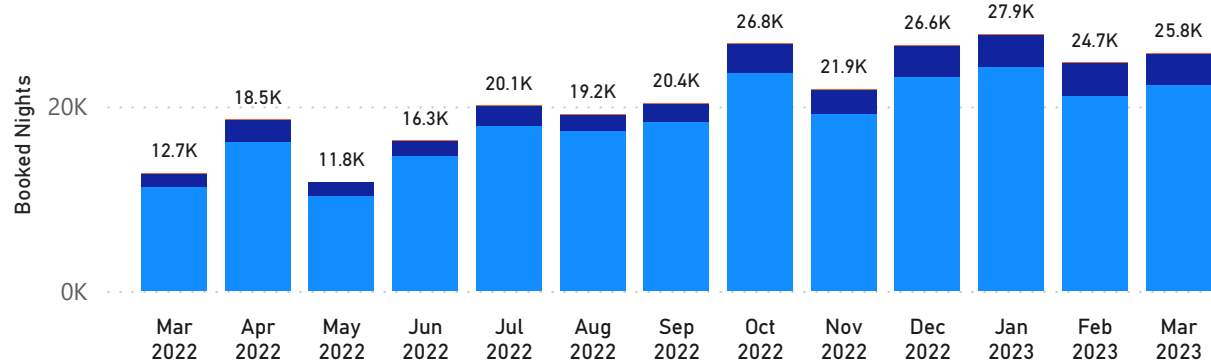
66%
Monthly Occupancy

▼ -7.3%
Occupancy MoM

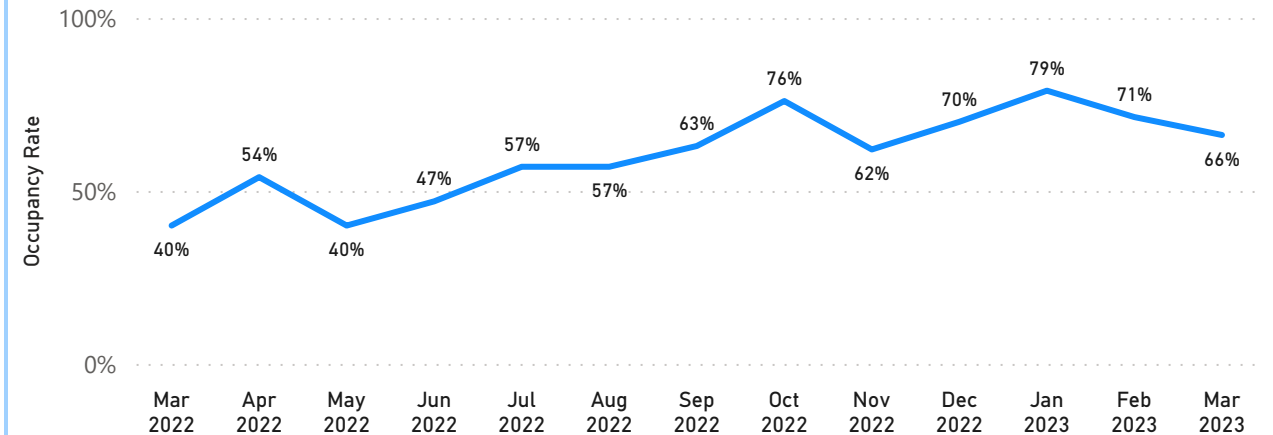
▲65.5%
Occupancy YoY

Monthly Demand (Booked Nights) by Listing Type

● Entire Place ● Private Room ● Shared Room

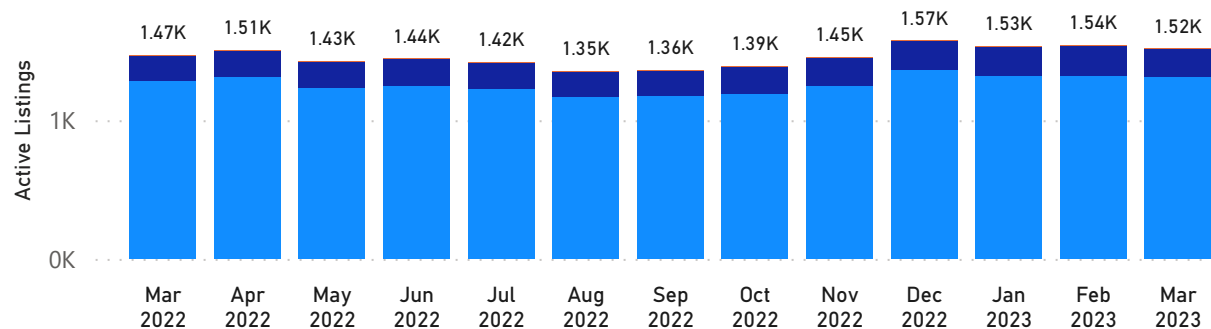


Monthly Occupancy Rate

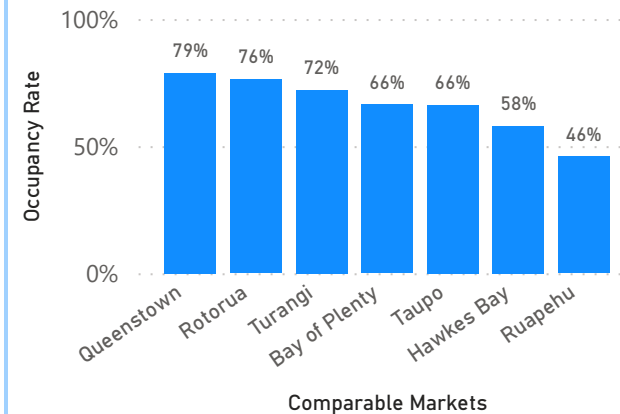


Monthly Active Listing Count by Type

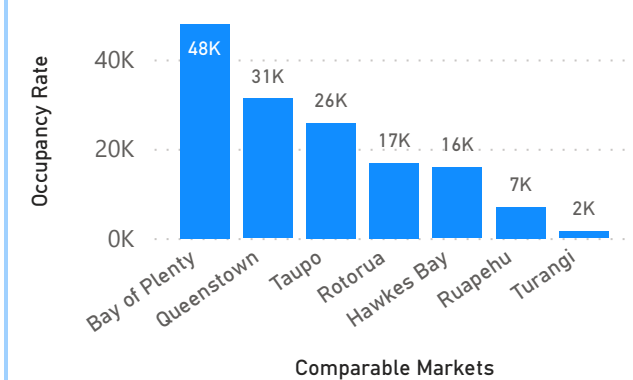
● Entire Place ● Private Room ● Shared Room



Occupancy vs. Sub-markets - Mar'23



Booked Nights vs. Sub-markets - Mar'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



435K	▼ -1.9%	280K	▼ -5.3%
Total - Latest Month	Total MoM	International - Latest Month	International MoM
	▲559%		▲1452%
	Total YoY		International YoY

8/06/2020 31/03/2023

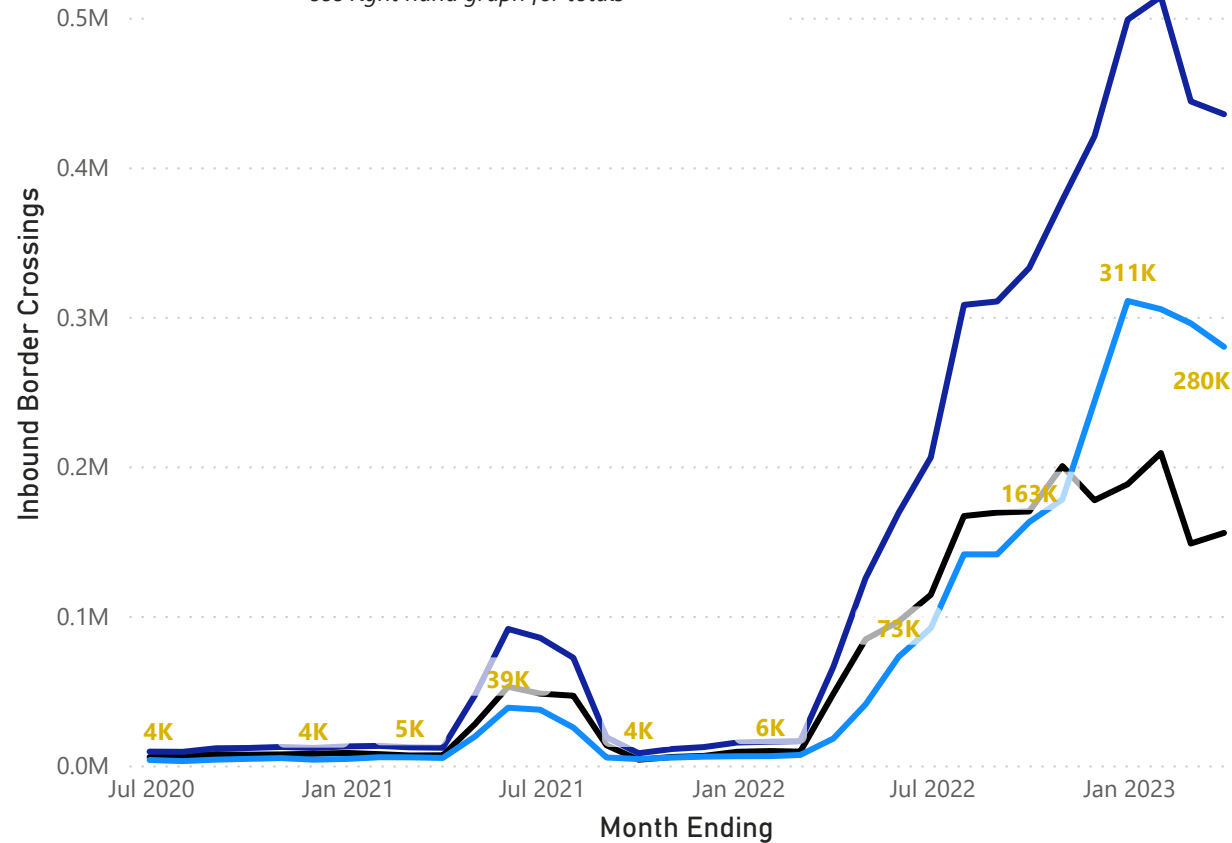
Drag slider to focus date range



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

