

## Mackenzie Tourism Insights

### November 2024



- November was a good month for tourism in the Mackenzie, with significant growth in accommodation use and international visitor card spending, as well as moderate growth in tourism-related employment, outperforming national trends. However, domestic visitor card spending declined.
- International visitor card spending increased significantly (+14% YoY), surpassing the growth in international guest nights (+2%), suggesting higher average spending per visitor or increased day trip visitation. Conversely, domestic accommodation use rose by +5% YoY, outpacing a -7% YoY decline in domestic card spending. The domestic card spend decrease was primarily driven by a -9% YoY drop in spending by Cantabrians, partially offset by growth from visitors from Waikato (+21% YoY) and Southland (+8% YoY).
- In the international market, Australia, which ranked 2nd in visitor card spending in Nov '23, fell to 4th rank, overtaken by the Rest of Asia (excluding China, Japan, and Korea) and the Rest of Europe (excluding the UK and Germany) markets, with spending increases of +34% YoY and +26% YoY, respectively. Australian visitor spending decreased by -18% YoY.
- The strongest international spending growth was observed in food and beverage serving products (+57% YoY) and retail food and beverage products (+43% YoY). Unlike national trends, Mackenzie showed a growing preference for dining out over self-catering, reflecting the region's strong culinary appeal. In the domestic market, the largest increase in spending was on accommodation products (+26% YoY), consistent with the +5% YoY rise in domestic guest nights.
- After stagnation in October, November brought a strong recovery for Mackenzie's commercial accommodation sector, with a +13% YoY increase in total guest nights. This growth was driven by a significant +18% YoY increase in domestic guest nights and a +10% YoY increase in international guest nights. Occupancy rose moderately (+3%pt YoY), as the supply of available stay units increased by +7%.
- Holiday parks, campgrounds, and motels with more than 20 stay units were particularly popular, with guest nights increasing for both domestic (+33% YoY and +42% YoY, respectively) and international visitors (+24% YoY and +26% YoY, respectively). Lodges and boutique accommodations attracted more international visitors (+8% YoY) but saw no change in domestic demand. Conversely, smaller motels (up to 20 units) experienced a significant decline in international guest nights (-47% YoY) while gaining domestic demand (+14% YoY).

- Short-term rental occupancy rates declined slightly (-2%pt YoY), significantly outperforming the national average of -7%pt. Usage was low at the start of the month but increased notably around Canterbury Anniversary Day, remaining strong through the rest of November.
- Tourism-related employment grew by +4% YoY, while total employment earnings declined slightly by -3% YoY, both metrics outperforming the national averages of 0% and -7%, respectively. Job growth was driven by significant increases in travel and tour services (+17% YoY) and recreation services (+17% YoY). However, jobs in the accommodation sector declined by -3% YoY.

Note: The monthly Tourism Data Insights are provided by Vistr who are contracted by Mackenzie Tourism (part of Mackenzie District Council).