

Mackenzie Tourism Insights

April 2025



Short-term rentals lead April gains despite job drop

April was a mostly positive month for tourism in the Mackenzie region, with strong growth in domestic card spending—significantly ahead of domestic guest nights—likely driven by high short-term rental activity. Occupancy rates in both short-term rentals and large motels grew ahead of the national average, while international guest nights also showed solid gains. However, tourism-related employment contracted notably, reflecting a sharper seasonal decline than the national trend. Notably, April included Easter this year, whereas it mostly fell in March last year, which may have contributed to stronger domestic activity in certain accommodation segments.

Domestic spending outpaces guest nights, short-term rentals drive growth

While international card spend (+6% YoY) and international guest nights (+5% YoY) expanded at similar rates, domestic card spend growth (+20% YoY) significantly outpaced the modest increase in domestic guest nights (+1% YoY). This disparity is likely linked to strong performance in the short-term rental sector, where occupancy rates grew well ahead of the national average.

Domestic shift to self-catering meets recreation decline, international dining surges

Within the domestic market, card spend on retail food and beverage (+36% YoY) slightly exceeded growth in spending on food and beverage serving services (+32% YoY), suggesting a possible consumer shift towards self-catering, potentially influenced by increased preference for short-term rentals. Conversely, in the international market, food and beverage serving spend surged (+67% YoY), far outpacing the growth in retail food and beverage spend (+31% YoY). Both markets recorded notable declines in recreation spend, with domestic card spend dropping -47% YoY and international card spend falling -35% YoY.

Cantabrians spend more in April

Several domestic markets recorded strong card spend growth, notably among Cantabrians, who spent +24% YoY more within the region—well above their national spend increase of +9% YoY. Among international markets, US visitor card spend rose +33% YoY, aligning with the overall national trend (+31% YoY). Australian visitor spend grew +7% YoY, significantly ahead of the national decline of -1% YoY. However, card spend growth from the Rest of Asia (excluding China, Japan, and Korea), the 3rd largest international market by spend volume, slowed sharply to +4% YoY, trailing the national average of +13% YoY.

US and Australia outperform, while Asia's spending lags

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Short-term rentals rise faster, domestic reliance remains strong

Occupancy in commercial accommodation grew in line with the national average (+2%pt YoY), while short-term rental occupancy expanded significantly ahead of it. Although international guest nights in commercial accommodation increased +5% YoY, domestic guest nights remained steady (+1% YoY), reinforcing the trend towards increased domestic reliance on short-term rentals.

Domestic nights decline in parks and motels, rentals see gains

The decline in domestic guest nights in holiday parks and campgrounds (-5% YoY) supports this shift. At the upper end of the market, domestic guest nights in lodges and boutique accommodation fell sharply (-21% YoY), possibly indicating a preference for premium short-term rental alternatives. Meanwhile, international guest nights in holiday parks and campgrounds rose +6% YoY, maintaining stable demand for this category. Large motels (over 20 stay units) stood out this month, with domestic guest nights up +21% YoY and international guest nights up +36% YoY. This came alongside a +16% YoY increase in available stay units, yet the occupancy rate still rose by +3%pt.

Stark drop in Mackenzie tourism jobs amid post-summer lull

Tourism-related employment in the Mackenzie region declined -10% YoY in April, contrasting with the national average of +0% YoY. All tourism employment categories contracted, likely reflecting a more pronounced off-peak seasonal adjustment post-summer. The sharpest decline occurred in food and beverage services (-22% YoY), followed by recreation services (-13% YoY), accommodation (-9% YoY), and travel and tour services (-8% YoY).

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