Monthly Destination Performance Report

Mackenzie Region - August 2025

Mackenzie Region

Visitor Card Spending		Accommodation Occupancy		Tourism-related Employment	
Domestic	International	Commercial	Short-term Rental	Filled Jobs	Employment Earnings
4.0M$	4.0M$	47%	68%	650	2.9M$
vs. Aug '24	vs. Aug '24	vs. Aug '24	vs. Aug '24	vs. Aug '24	vs. Aug '24
▼ -6%	▲ 9%	↑ 1%pt.	↑ 7%pt.	▲ 2%	▲ 3%
All NZ	All NZ	All NZ	All NZ	All NZ	All NZ
▲ 1%	▲ 5%	↑ 1%pt.	↑ 11%pt.	▼ -1%	▲ 1%

Note: Vistr proprietary spend modelling estimates*

%pt. - arithmetic difference between the two percentages

Summary

Mackenzie region sees strong international spend despite domestic slowdown
August was a month of mixed results for the Mackenzie Region. Domestic card spend declined (-6% YoY), trailing the national average and following a cluster of deceleration among nearby RTOs. International card spend grew strongly (+9% YoY), ahead of the national average, with the US market overtaking Australia as the largest spender. Commercial accommodation reported generally positive metrics, with guest nights increasing (+4% YoY) and occupancy up. This growth was driven solely by guest arrivals. Tourism-related employment for the month grew slightly (+2% YoY), ahead of the national average, driven solely by growth in travel and tour services.

Domestic and international average spend dips, or day trip visitation lowers
The variation between the drop in total domestic card spend (-6% YoY) and the domestic guest night stability of 0% YoY suggested that either average spend had decreased, or there was a lower prevalence of day trip visitation. Conversely, the international card spend grew strongly (+9% YoY) when contrasted with the increase in international guest nights of +10% YoY suggested the opposite; a marginal decrease in average spend, or a lower prevalence of day trip visitation.

August card spend in Mackenzie highlights robust accommodation, softer dining
Card spend in August showed mixed results overall for the Mackenzie Region, while it appeared that the off-peak seasonal trough of monthly spend had passed, following 2024 trends. When segmenting card spend by product, accommodation posted exceptional growth for both the domestic (+17% YoY) and international (+30% YoY) markets. Food and beverage serving, however, dropped for both (domestic spend: -4% YoY, international spend: -2% YoY), which solidified that food and beverage retail was still the dominant catering category (28% of domestic spend and 22% of international spend, versus food and beverage serving at 21% of domestic spend and 16% of international spend).

Spend declines drive local markets below national average
Domestic card spend declined by -6% YoY, trailing the national average of +1% YoY and following what appeared to be a local downturning cluster between Queenstown (-9% YoY), Wānaka (-7% YoY), and Southland (-3% YoY), as all other South Island regions reported positive growth. While visitor spend from Cantabrians grew by +2% YoY, spend from other significant markets like Otago (-1% YoY) and Auckland (-25% YoY) declined.

US market overtakes Australia, fueling card spend growth
International card spend grew by +9% YoY, which was ahead of the national average (+5% YoY) but behind similar-sized markets for card spend like Dunedin (+14% YoY) and Nelson-Tasman (+28% YoY). With the exception of China (-1% YoY), the US (+12% YoY), Australia (+1% YoY), and the 'Rest of Asia' category (excluding China, Japan, and Korea, +16% YoY) all grew as significant markets. The growth recorded from the US market was enough to overtake Australia as the largest market relative to international card spend in August.

Occupancy edges higher, driven by ski events despite shorter stays
Commercial accommodation reported generally positive metrics for the Mackenzie Region in August, with occupancy increasing by +1%pt. YoY and guest nights by +4% YoY. The growth in guest nights was driven solely by guest arrivals (+8% YoY), although this was partially offset by a decline in average stay length (-3% YoY). A further decline in available stay units (-1% YoY) contributed to the increase in the occupancy rate. Short-term rental occupancy on the second and third weekends in August reached peaks of 84% and 86% respectively, which was likely due to the ski fields being in full operation and hosting slalom events.

Varying domestic trends, international momentum propel accommodation growth
The domestic/international market mix for guest nights (domestic: 0% YoY, international: +10% YoY) was variable among similar-sized South Island RTO regions, especially when considering domestic guest nights (West Coast: -18% YoY, Southland: +6% YoY, Marlborough: -3% YoY). International guest night results for RTO regions of a similar scale were more cohesive in their growth (West Coast: +6% YoY, Fiordland: +13% YoY, Dunedin: +17% YoY). When segmenting commercial accommodation by type, guest arrivals propelled growth for three of the four reported categories (holiday parks and campgrounds: +10% YoY, smaller motels and apartments: +21% YoY, lodges and boutique accommodation: +13% YoY), with the exception of large motels and apartments (-12% YoY).

Tourism jobs rise, led by travel services despite accommodation dip
Tourism-related employment grew by +2% YoY, slightly ahead of the national average (-1% YoY), and was generally ahead of similar-sized RTO regions across the South Island (Clutha: -5% YoY, Hurunui: 0%, Waitaki: +3% YoY). Tourism-related employment growth was driven solely by travel and tour services (+11% YoY) as an industry of tourism-related employment, with the net effect being reduced by a decline in accommodation (-4% YoY).

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* Due to a pause in MBIE's TECT data publication, monthly figures from July '25 onward are estimates derived from our proprietary forecasting model; noting that modelling continues to reflect electronic card spending only.

Card Spend	Accommodation	Employment	Visitor Arrivals

Card Spend Overview

Mackenzie Region - August 2025

Note: Due to a pause in MBIE's TECT data publication, monthly figures from July '25 onward are estimates derived from our proprietary forecasting model; noting that modelling continues to reflect electronic card spending only. This data estimates spending made via electronic cards, broken down by industry categories (ANZSIC Product categories) and source markets. To ensure reporting accuracy, smaller spend categories have been aggregated.

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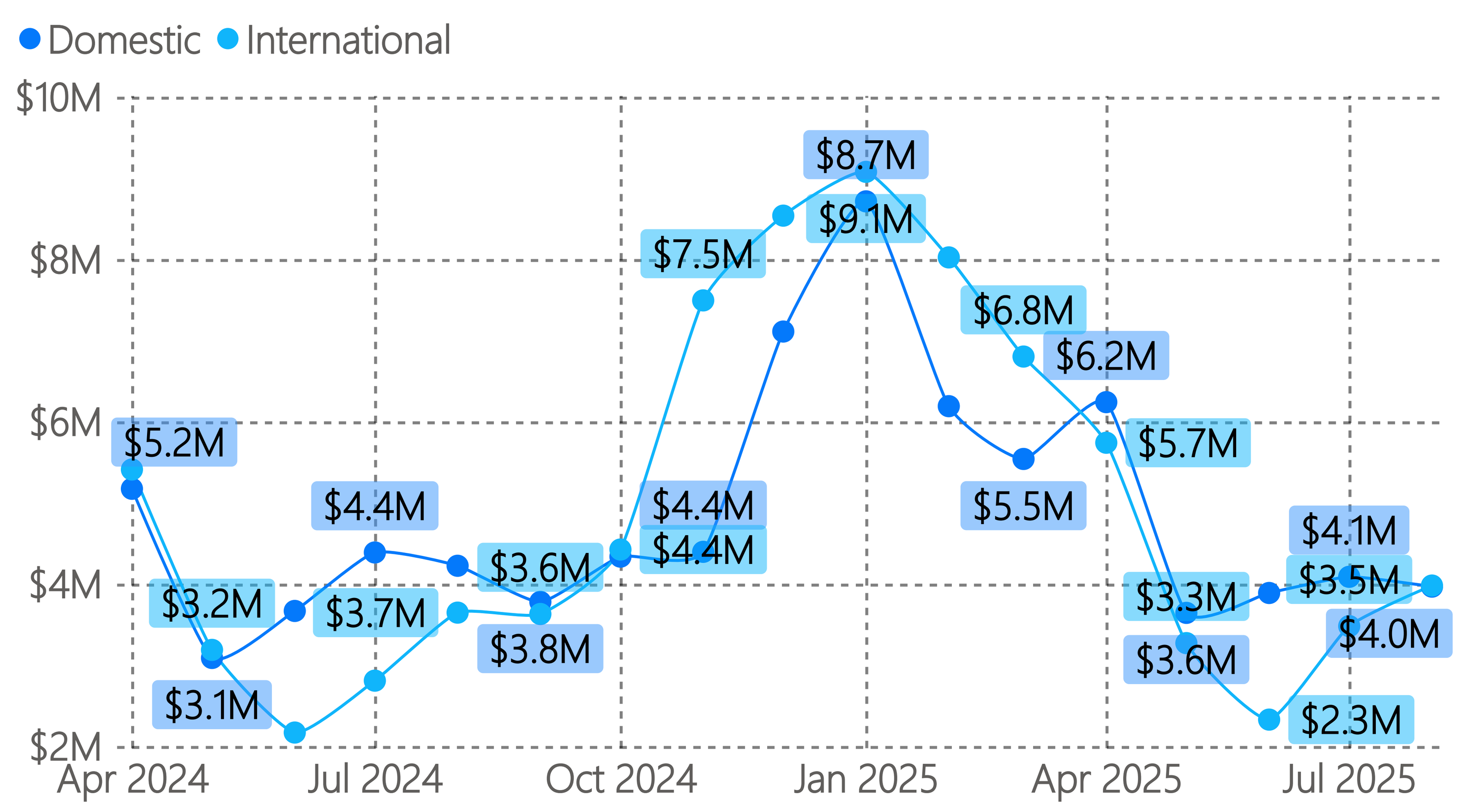
Card Spend

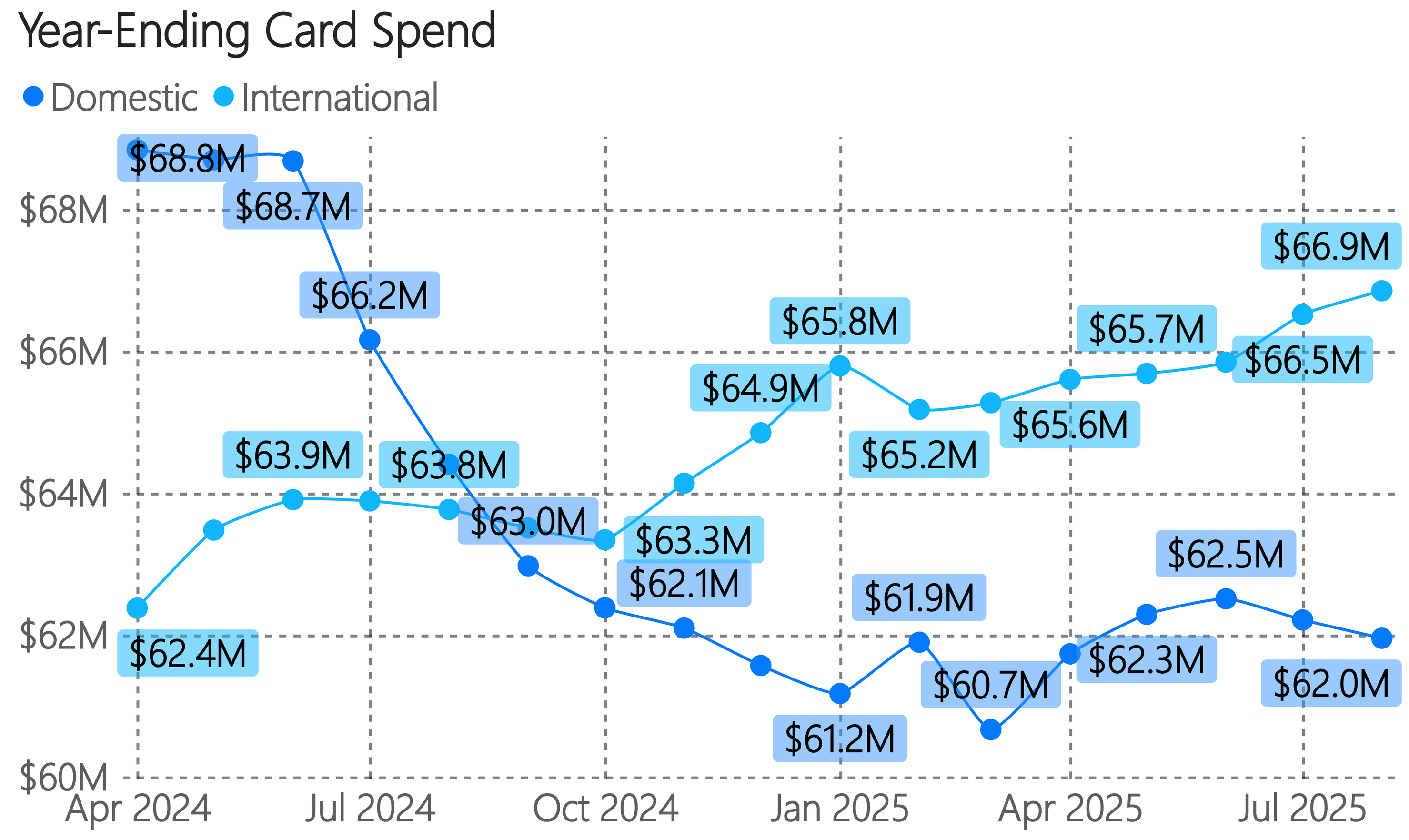
Domestic	International	Year-Ending Domestic	Year-Ending International
4.0M$	4.0M$	62.0M$	66.9M$
vs. Aug '24	vs. Aug '24	vs. Aug '24	vs. Aug '24
▼ -6%	▲ 9%	▼ -4%	▲ 5%

Card Spend Trends

Monthly Card Spend



Year-Ending Card Spend



Card Spend Benchmarks

Domestic Benchmark

RTO	Card Spend Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	77.9M	49.2%	▲6%	953M	47.4%	▼-3%
Queenstown	35.6M	22.5%	▼-9%	401M	19.9%	▼-6%
Timaru	14.0M	8.8%	▲0%	181M	9.0%	▼-4%
West Coast	9.3M	5.9%	▲9%	152M	7.6%	▲2%
Waitaki	7.6M	4.8%	▲3%	110M	5.5%	▼-2%
Hurunui	6.6M	4.2%	▲3%	93.7M	4.7%	▲2%
Mackenzie	4.0M	2.5%	▼-6%	62.0M	3.1%	▼-4%
Kaikoura	3.3M	2.1%	▲5%	58.5M	2.9%	▲5%
All NZ	820M		▲1%	11.0B		▼-3%

International Benchmark

RTO	Card Spend Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Queenstown	46.7M	57.4%	▼-9%	507M	44.7%	▼-1%
Canterbury	23.1M	28.4%	▲4%	386M	34.0%	▲8%
Mackenzie	4.0M	4.9%	▲9%	66.9M	5.9%	▲5%
West Coast	3.0M	3.6%	▲28%	86.3M	7.6%	▼-4%
Waitaki	1.2M	1.5%	▲25%	23.1M	2.0%	▲10%
Timaru	1.2M	1.5%	▲28%	20.5M	1.8%	▲9%
Hurunui	1.1M	1.3%	▲53%	16.4M	1.4%	▼0%
Kaikoura	1.1M	1.3%	▲32%	28.7M	2.5%	▲4%
All NZ	257M		▲5%	4.0B		▲6%

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Card Spend by Product

Mackenzie Region - August 2025

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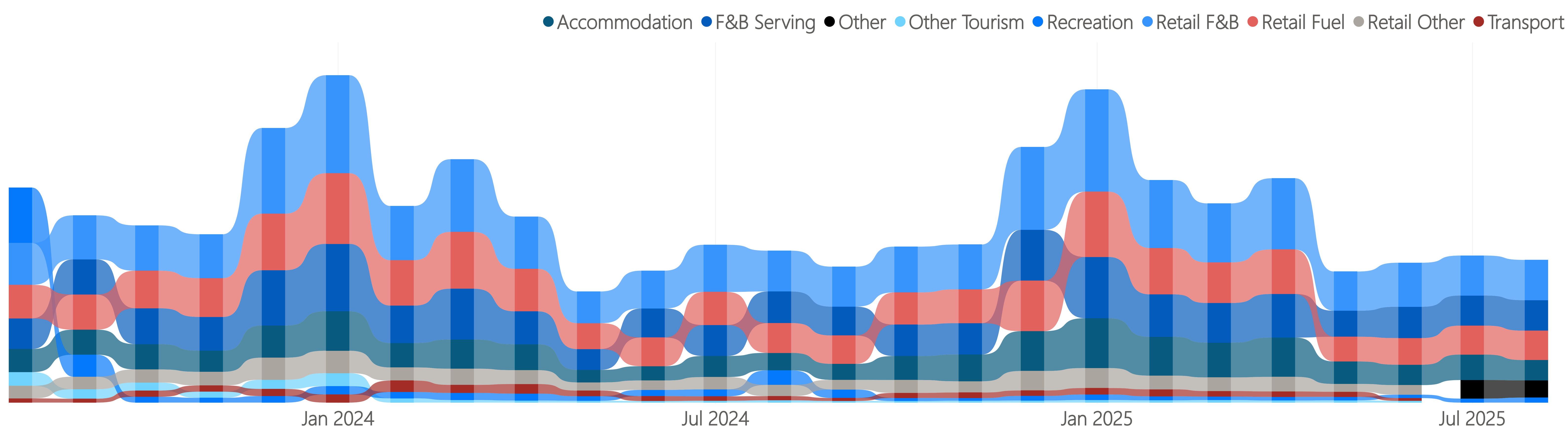
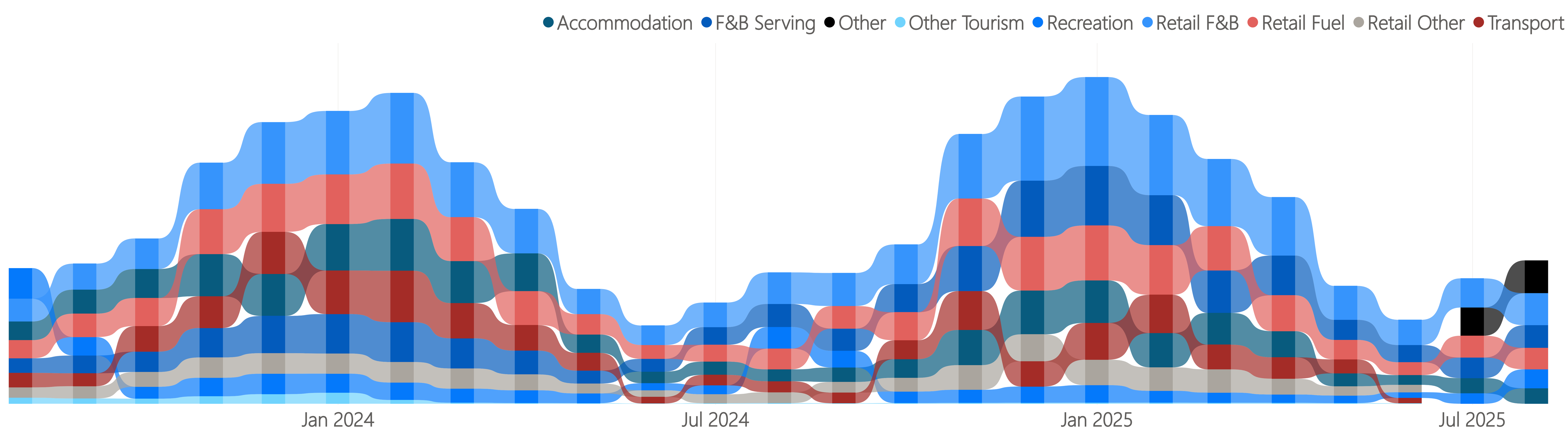
Product Overview

Product	Domestic Card Spend	Share of Domestic Card Spend	YoY Domestic Card Spend	Domestic Card Spend vs. 2019	International Card Spend	Share of International Card Spend	YoY International Card Spend	International Card Spend vs. 2019
Retail F&B	$1,122,223	28.2%	▼-1%	▲64%	$890,758	22.3%	▲2%	▲150%
F&B Serving	$848,534	21.4%	▼-4%	▲4%	$630,364	15.8%	▼-2%	▲56%
Retail Fuel	$818,589	20.6%	▼-1%	▲29%	$594,545	14.9%	▲3%	▲54%
Accommodation	$566,092	14.2%	▲17%	▼-21%	$428,786	10.8%	▲30%	▼-45%
Other	$478,637	12.0%	-	-	$911,322	22.9%	-	-
Recreation	$138,594	3.5%	▼-66%	▼-85%	$530,046	13.3%	▼-12%	▼-48%

Domestic Card Spend — Ranked by Product Type



International Card Spend — Ranked by Product Type



Card Spend by Product

Mackenzie Region - August 2025

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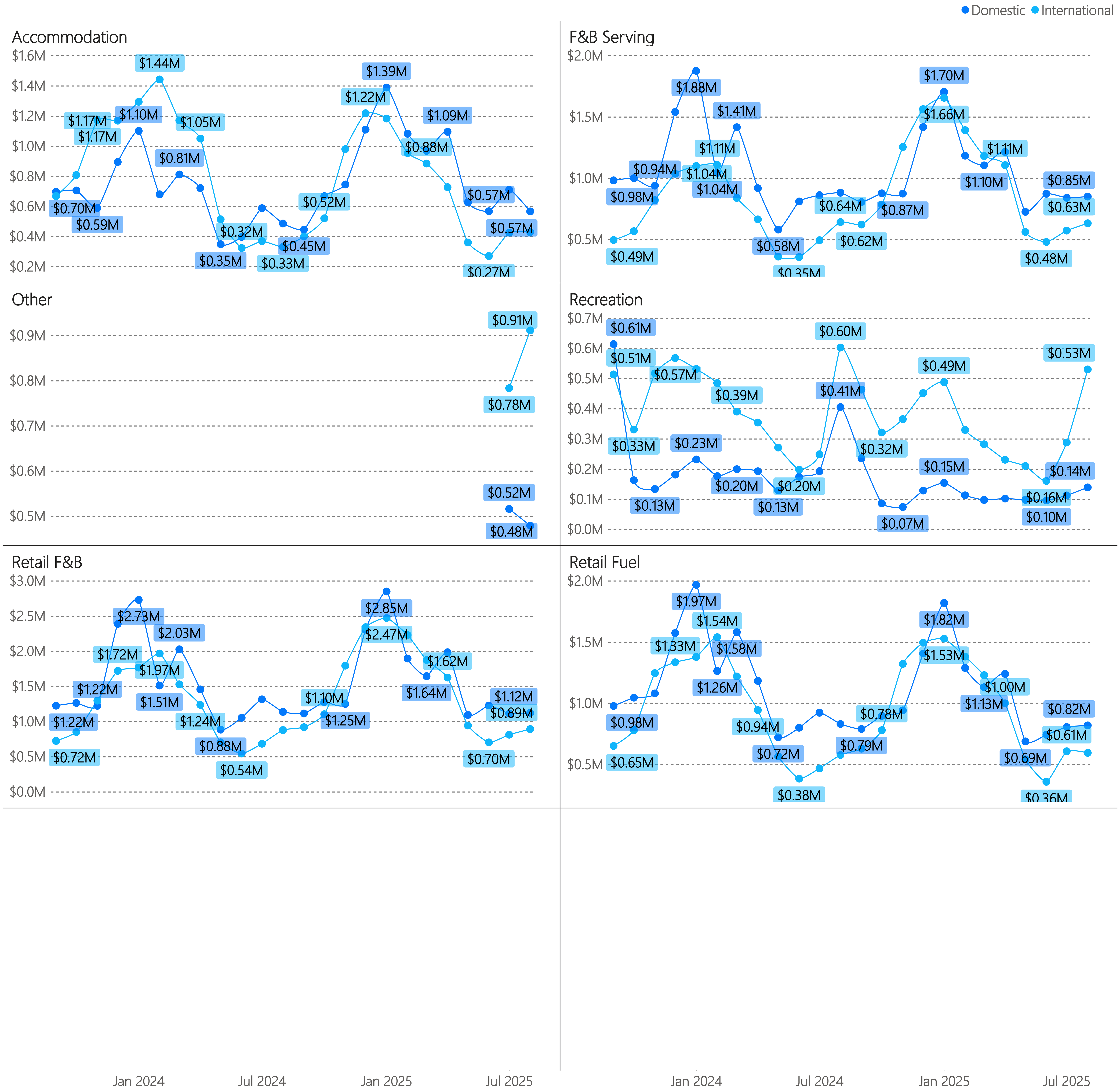
Trends by Product



Card Spend | Accommodation | Employment | Visitor Arrivals

Domestic Card Spend

Mackenzie Region - August 2025

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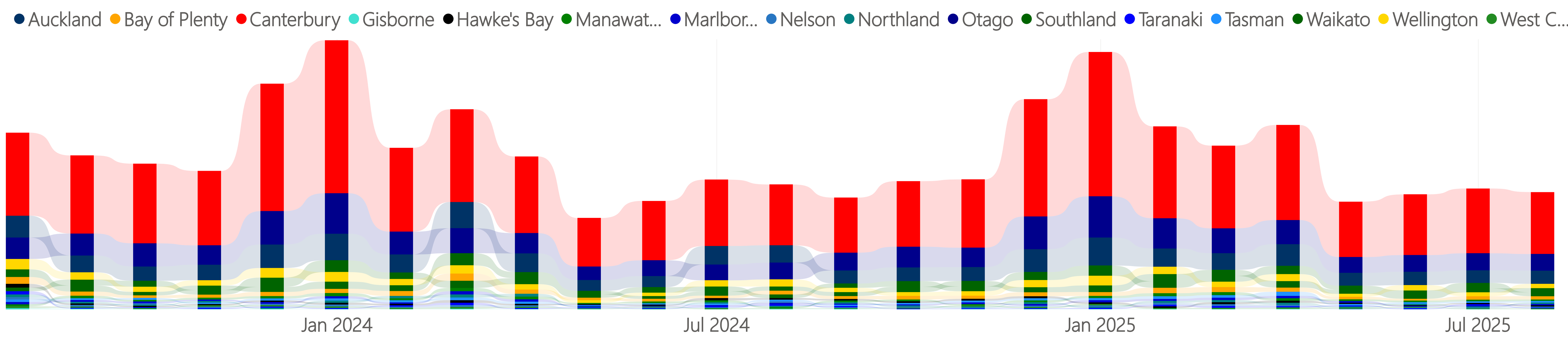
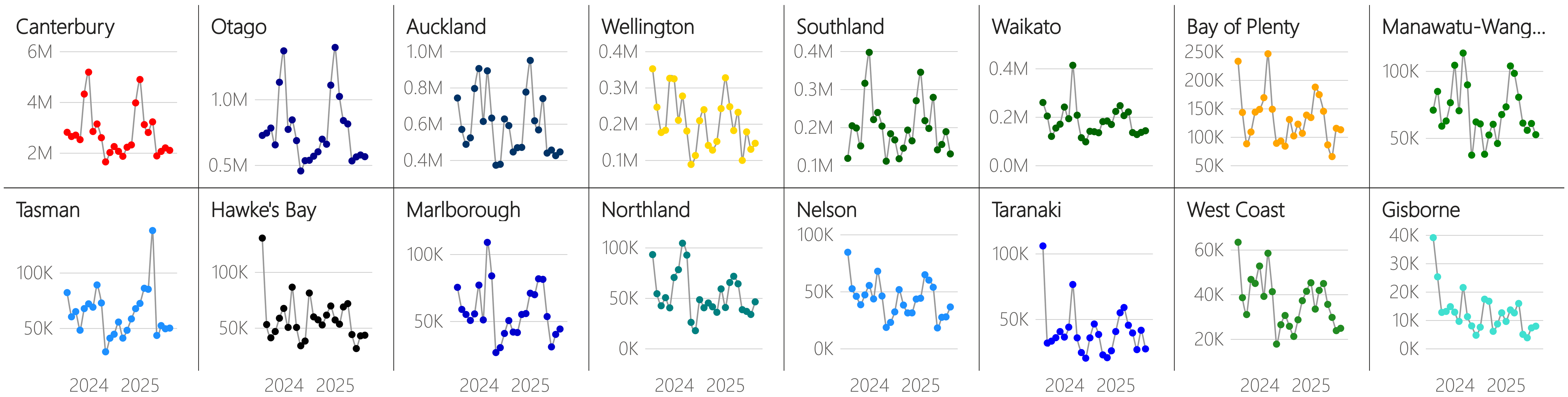
Domestic Spend — Table by Market

NZ Region	Domestic Card Spend	Share of Domestic Card Spend	YoY Domestic Card Spend	Domestic Card Spend vs. 2019
Canterbury	$2,098,904	52.8%	▲2%	▼-10%
Otago	$564,031	14.2%	▼-1%	▼-10%
Auckland	$445,039	11.2%	▼-25%	▼-7%
Wellington	$146,424	3.7%	▼-39%	▼-34%
Waikato	$142,885	3.6%	▲3%	▲22%
Southland	$130,132	3.3%	▲11%	▲37%
Bay of Plenty	$112,627	2.8%	▼-14%	▲24%
Manawatu-Wanganui	$52,487	1.3%	▲39%	▼-7%
Tasman	$49,998	1.3%	▼-10%	▲2%
Northland	$46,224	1.2%	▲15%	▲51%
Marlborough	$44,126	1.1%	▼-13%	▲12%
Hawke's Bay	$43,404	1.1%	▼-27%	▲2%
Nelson	$36,434	0.9%	▼-29%	▲1%
Taranaki	$27,297	0.7%	▼-41%	▼-42%
West Coast	$24,795	0.6%	▼-4%	▼-27%
Gisborne	$7,862	0.2%	▼-55%	▼-32%

Domestic Spend — Ranked by Market



Card Spend Trends — by Domestic Market



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International Card Spend

Mackenzie Region - August 2025

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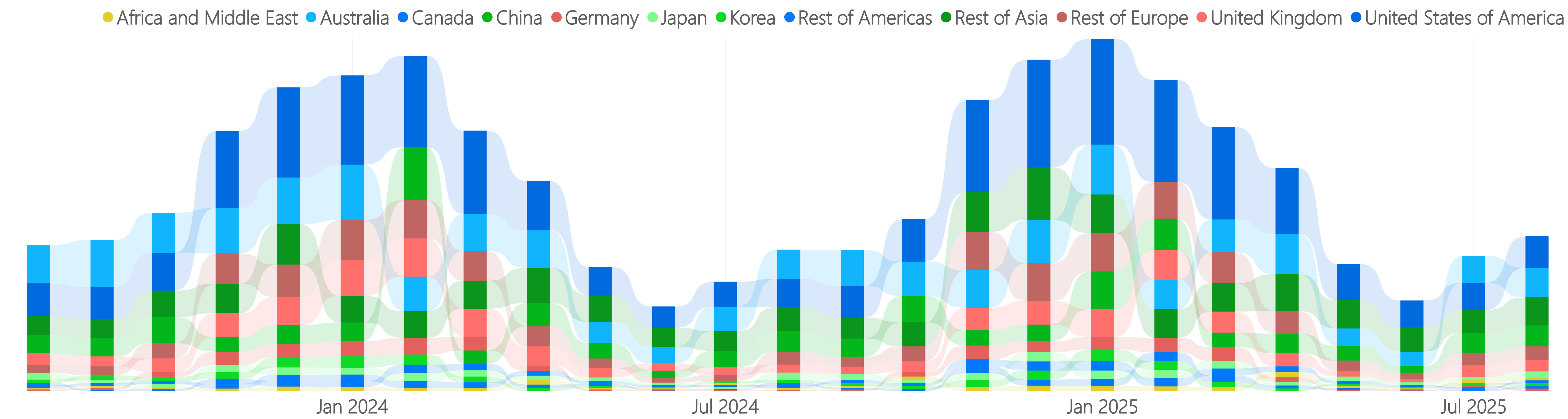
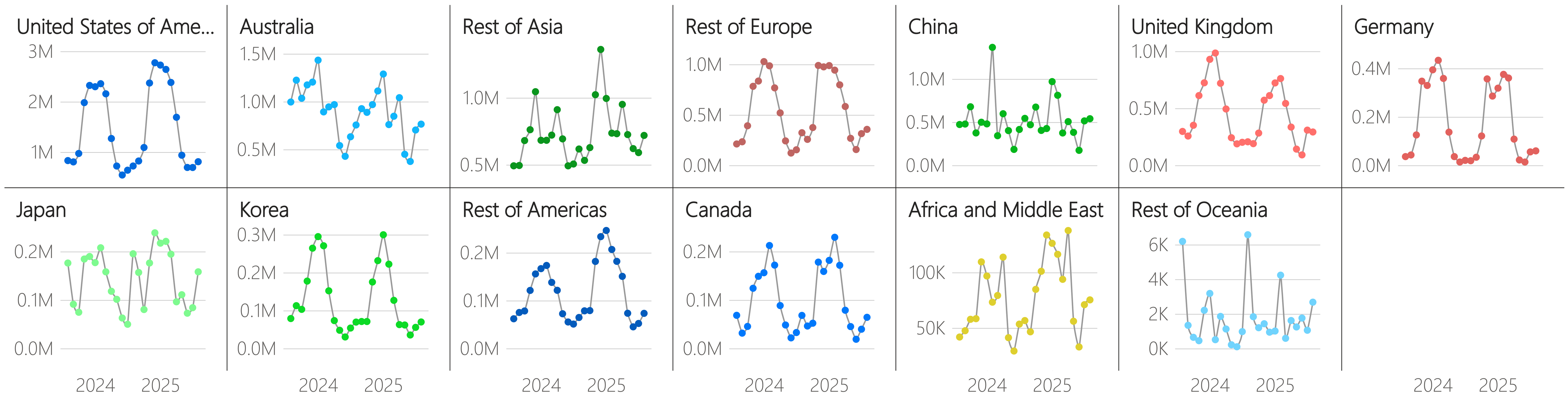
International Spend — Table by Market

Overseas Markets	International Card Spend	Share of International Card Spend	YoY International Card Spend	International Card Spend vs. 2019
United States of America	$809,299	20.3%	▲12%	▲61%
Australia	$764,684	19.2%	▲1%	▼-33%
Rest of Asia	$719,189	18.0%	▲16%	▲87%
China	$540,227	13.6%	▼-1%	▲21%
Rest of Europe	$356,392	8.9%	▲10%	▲30%
United Kingdom	$292,531	7.3%	▲42%	▲18%
Japan	$158,204	4.0%	▼-19%	▼-42%
Africa and Middle East	$75,313	1.9%	▲33%	▲230%
Rest of Americas	$73,375	1.8%	▲13%	▲194%
Korea	$69,862	1.8%	▲0%	▲14%
Canada	$64,299	1.6%	▼-6%	▼-54%
Germany	$59,770	1.5%	▲213%	▲4%
Rest of Oceania	$2,677	0.1%	▼-59%	▲384%

International Spend — Ranked by Market



Card Spend Trends — by International Markets



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Accommodation Overview

Mackenzie Region - August 2025

Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.

> Commercial accommodation reported generally positive metrics for the Mackenzie Region in August, with occupancy increasing by +1%pt. YoY and guest nights by +4% YoY. The growth in guest nights was driven solely by guest arrivals (+8% YoY), although this was partially offset by a decline in average stay length (-3% YoY).

Commercial Accommodation

Occupancy	Guest Nights	Available Stay Units	Average Stay Length	Guest Arrivals
47%	51.2K	59.0K	1.7	30.6K
vs. Aug '24	vs. Aug '24	vs. Aug '24	vs. Aug '24	vs. Aug '24
↑ 1%pt.	▲ 4%	▼ -1%	▼ -3%	▲ 8%

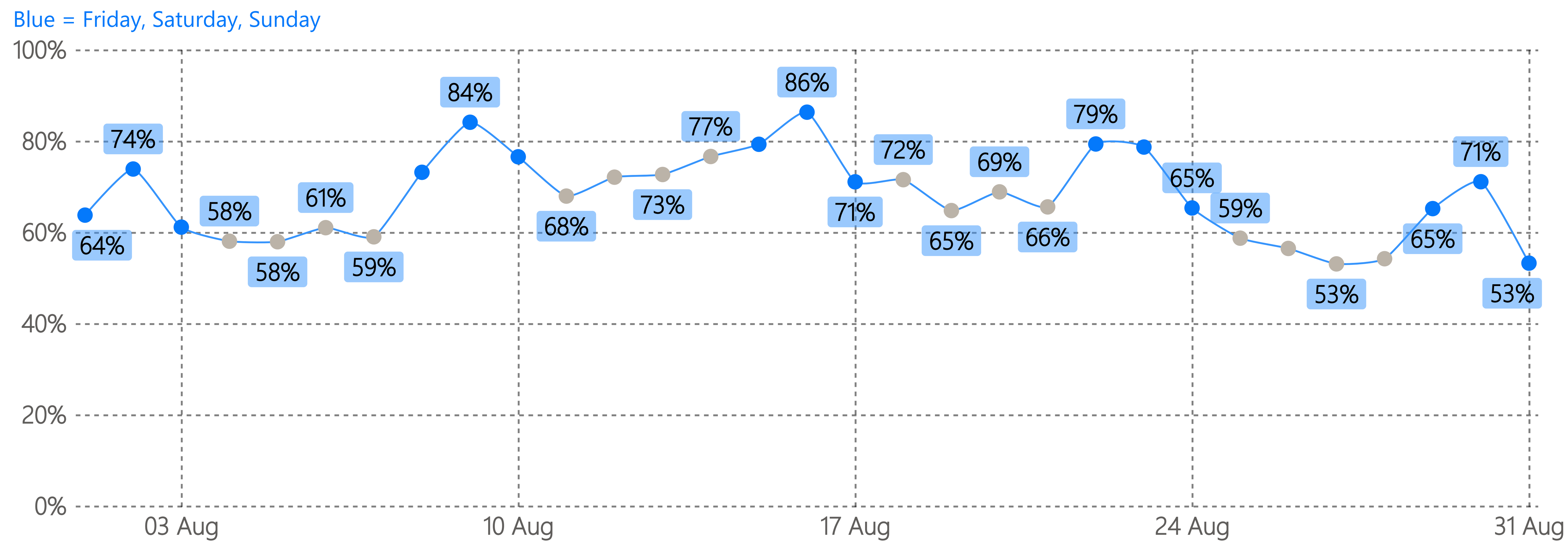
Short-term Rental Accommodation

Occupancy

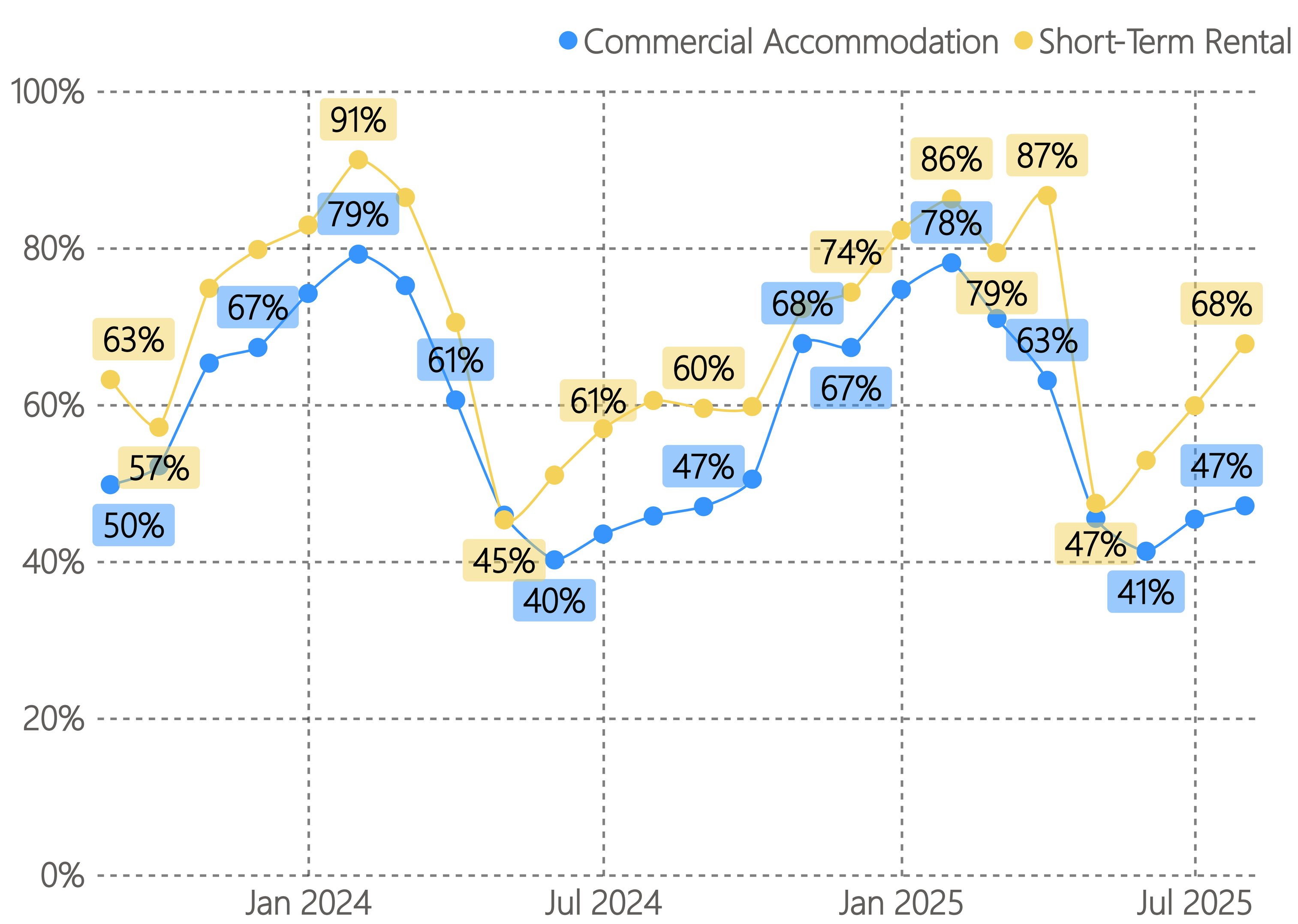
68%

vs. Aug '24

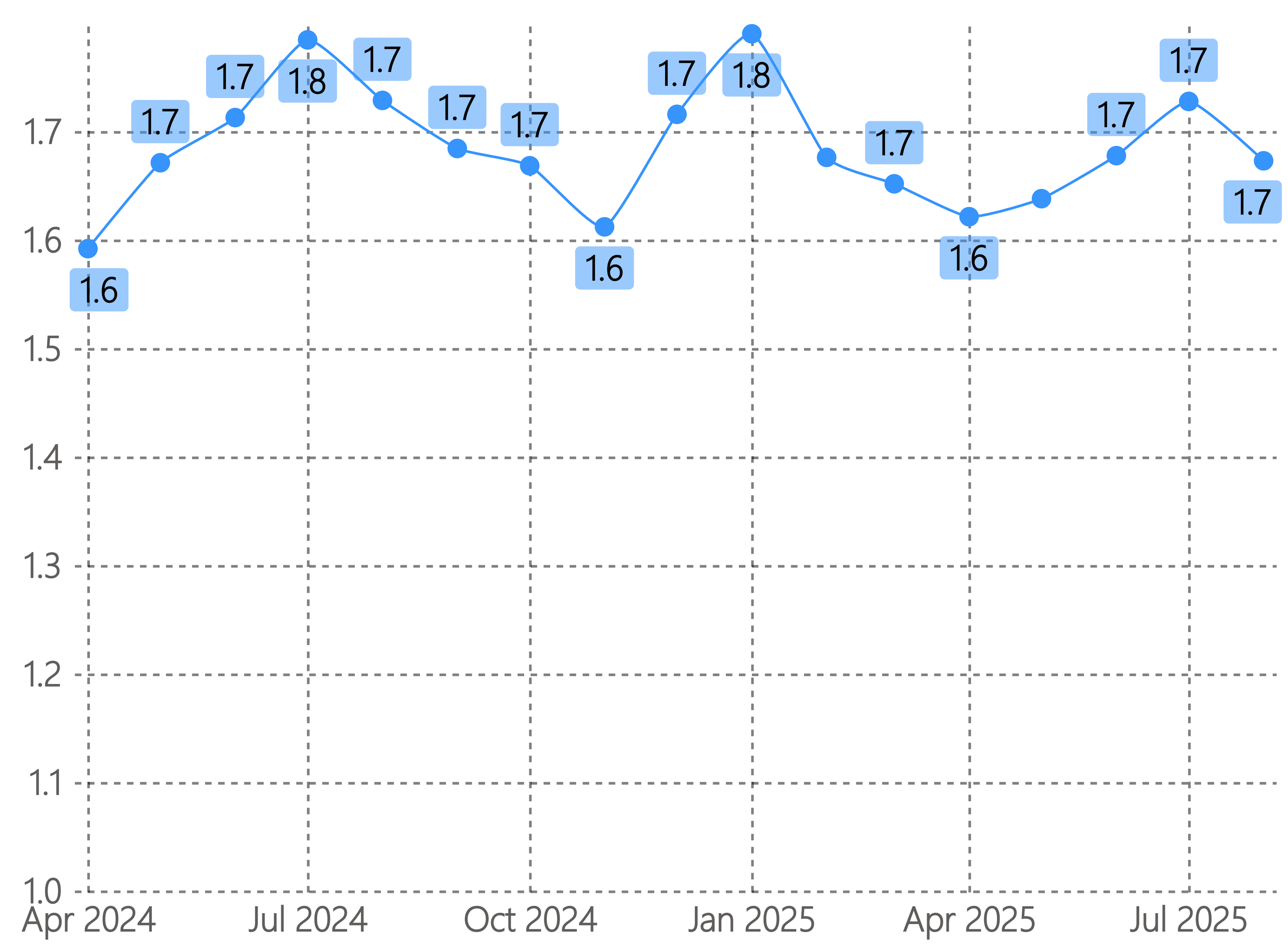
↑ 7%pt.



Occupancy



Average Stay Length in Commercial Accommodation



Accommodation Overview

Mackenzie Region - August 2025

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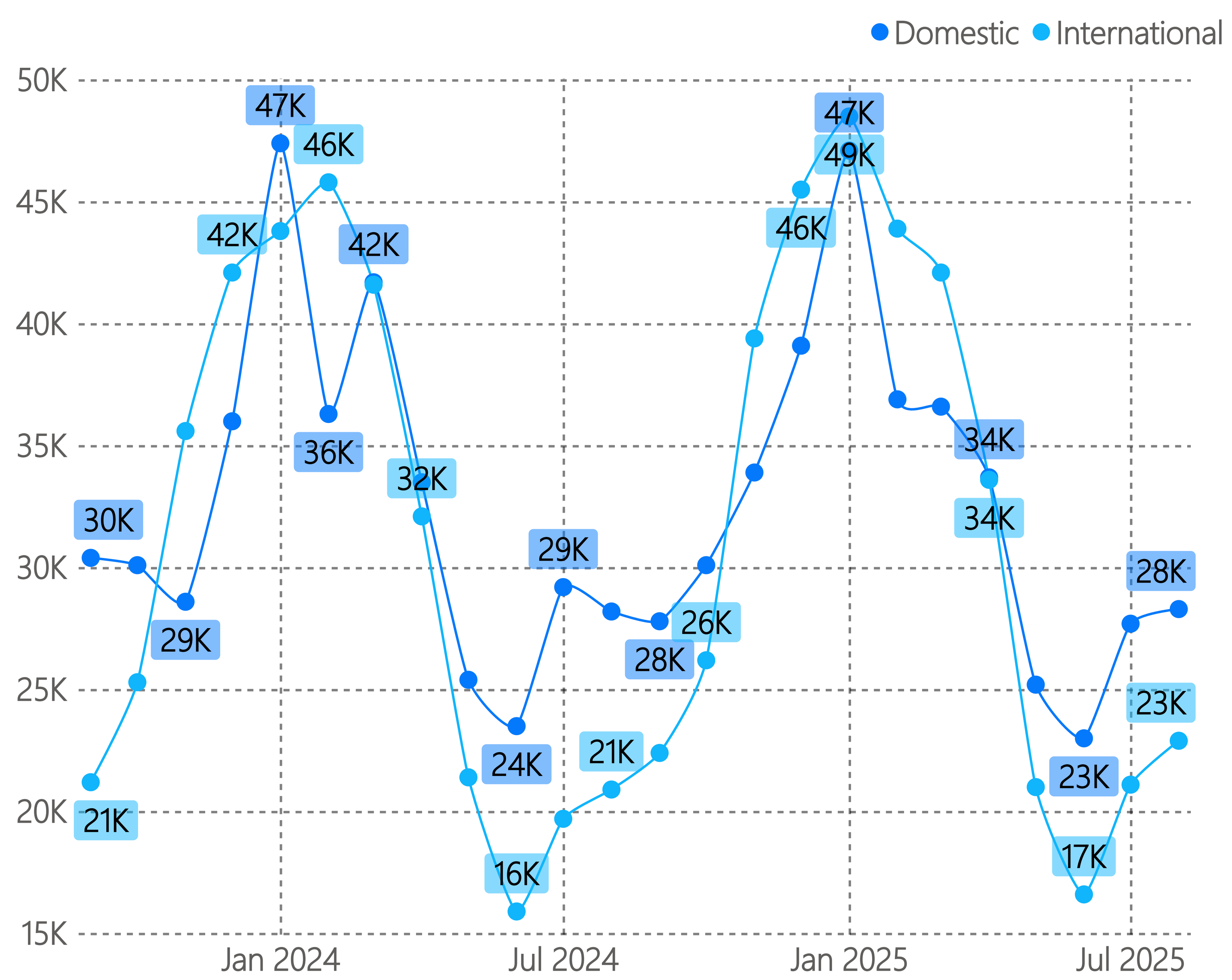
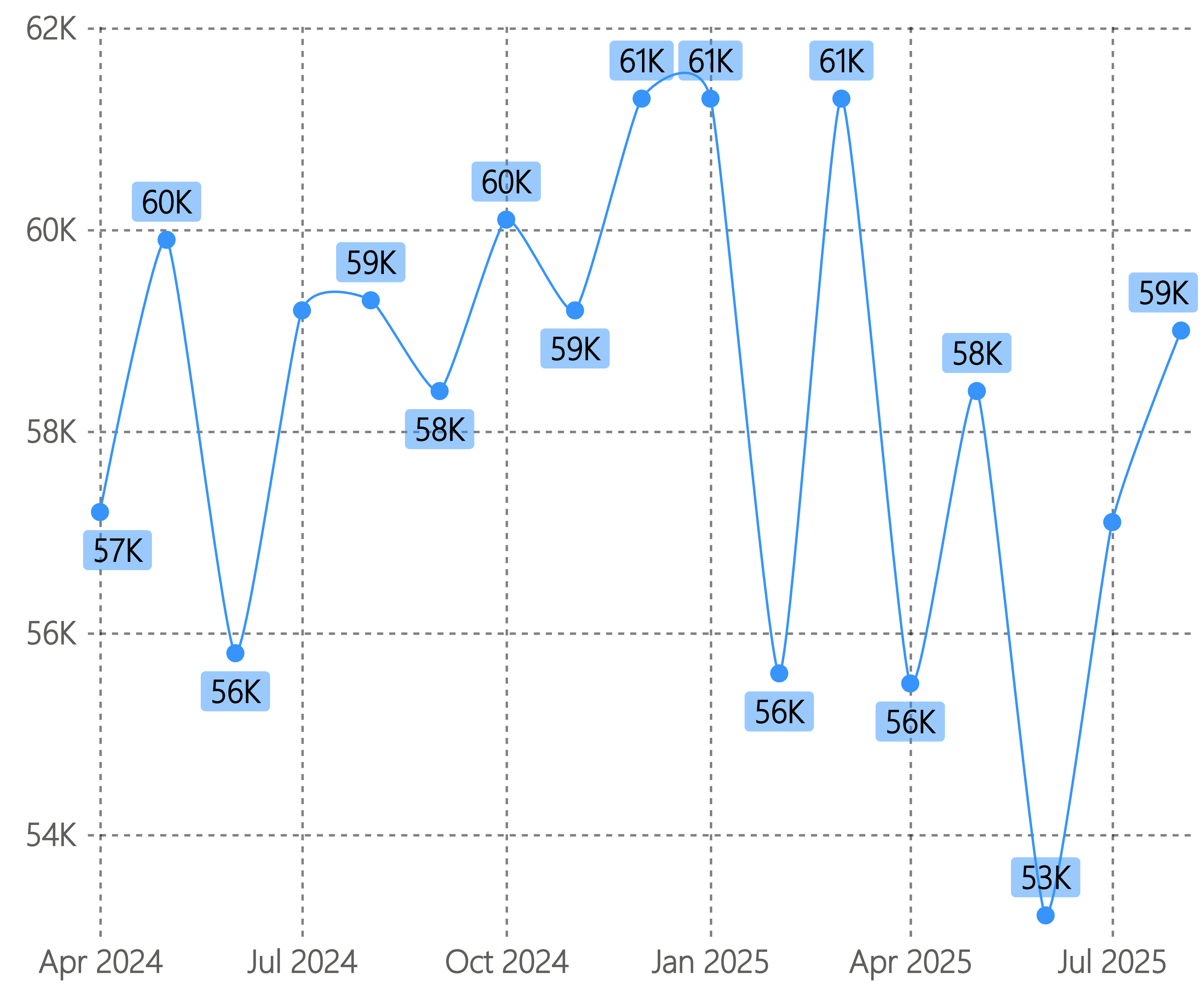
Guest Nights in Commercial Accommodation



Available Monthly Stay Unit Capacity



Commercial Accommodation Benchmark Comparison

Domestic Guest Nights

RTO	Guest Nights Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	173K	33.7%	▲7%	2.4M	31.9%	▲3%
Queenstown	114K	22.1%	▼-8%	1.4M	18.1%	▼-6%
Dunedin	51K	9.8%	▲22%	598K	7.9%	▼-1%
Nelson Tasman	49K	9.6%	▲19%	953K	12.6%	▼-5%
Mackenzie	28K	5.5%	▲0%	389K	5.2%	▼0%
West Coast	28K	5.5%	▼-18%	607K	8.0%	▼-2%
Waitaki	19K	3.7%	▼-3%	318K	4.2%	▼-2%
Timaru	19K	3.6%	▲9%	303K	4.0%	▼-1%
Hurunui	18K	3.5%	▲3%	290K	3.8%	▼-8%
Kaikoura	15K	2.9%	▲15%	320K	4.2%	▲5%
All NZ	1.8M		▲5%	25.7M		▼0%

International Guest Nights

RTO	Guest Nights Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Queenstown	195K	53.9%	▲9%	2.3M	39.8%	▲7%
Canterbury	84K	23.2%	▲26%	1.4M	24.2%	▲4%
Mackenzie	23K	6.3%	▲10%	383K	6.7%	▲5%
West Coast	21K	5.7%	▲6%	672K	11.7%	▼-4%
Dunedin	10K	2.6%	▲17%	227K	3.9%	▲3%
Waitaki	9K	2.6%	▲37%	155K	2.7%	▲7%
Kaikoura	7K	2.0%	▲20%	196K	3.4%	▼-2%
Nelson Tasman	7K	2.0%	▼-8%	301K	5.2%	▼-3%
Timaru	3K	0.9%	▲26%	72K	1.2%	▲2%
Hurunui	3K	0.7%	▼-13%	69K	1.2%	▲1%
All NZ	769K		▲8%	13.7M		▲3%

Accommodation by Type

Mackenzie Region - August 2025

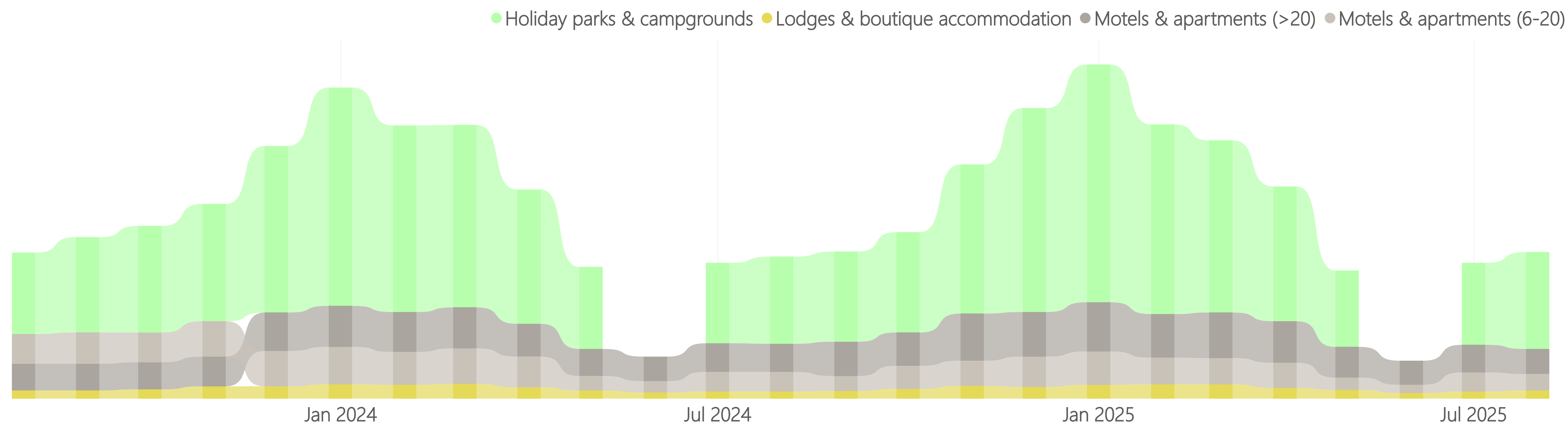
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.

> The domestic/international market mix for guest nights (domestic: 0% YoY, international: +10% YoY) was variable among similar-sized South Island RTO regions, especially when considering domestic guest nights (West Coast: -18% YoY, Southland: +6% YoY, Marlborough: -3% YoY). International guest night results for RTO regions of a similar scale were more cohesive in their growth (West Coast: +6% YoY, Fiordland: +13% YoY, Dunedin: +17% YoY).

Accommodation Type Overview

Accommodation Type	Guest Arrivals	Share of Guest Arrivals	YoY Guest Arrivals	Guest Nights	Share of Guest Nights	YoY Guest Nights	Average Stay Length	YoY Average Stay Length	Available Stay Units	YoY Available Stay Units	Occupancy	YoY Occupancy
Holiday parks & campgrounds	12,400	69.3%	▲10%	19,000	66.4%	▲12%	1.5	▲1%	25,400	▼-3%	0.32	↑ 3%pt.
Motels & apartments (>20)	2,300	12.8%	▼-12%	4,900	17.1%	▼-9%	2.1	▲1%	4,900	▼-2%	0.54	↓ -3%pt.
Motels & apartments (6-20)	2,300	12.8%	▲21%	3,100	10.8%	▼-18%	1.4	▼-30%	2,700	▲8%	0.59	↓ -21%pt.
Lodges & boutique accommodation	900	5.0%	▲13%	1,600	5.6%	▲14%	1.8	▲2%	2,200	▲10%	0.38	0%pt.
Backpackers			-			-		-		-		
Hotels			-			-		-		-		
Total	30,600		▲8%	51,200		▲4%	1.7	▼-3%	59,000	▼-1%	0.47	↑ 1%pt.

Total Guest Nights — Ranked by Accommodation Type



Accommodation Type by Market

Accommodation Type	Domestic Guest Nights	Share of Domestic Guest Nights	YoY Domestic Guest Nights	Inter. Guest Nights	Share of Inter. Guest Nights	YoY Inter. Guest Nights	Total Guest Nights	Share of Total Guest Nights	YoY Total Guest Nights
Holiday parks & campgrounds	10,000	63.3%	▲10%	9,000	70.3%	▲14%	19,000	66.4%	▲12%
Motels & apartments (>20)	3,300	20.9%	▼-6%	1,600	12.5%	▼-16%	4,900	17.1%	▼-9%
Motels & apartments (6-20)	1,500	9.5%	▼-52%	1,600	12.5%	▲129%	3,100	10.8%	▼-18%
Lodges & boutique accommodation	1,000	6.3%	▲11%	600	4.7%	▲20%	1,600	5.6%	▲14%
Backpackers			-			-			-
Hotels			-			-			-
Total	28,300		▲0%	22,900		▲10%	51,200		▲4%

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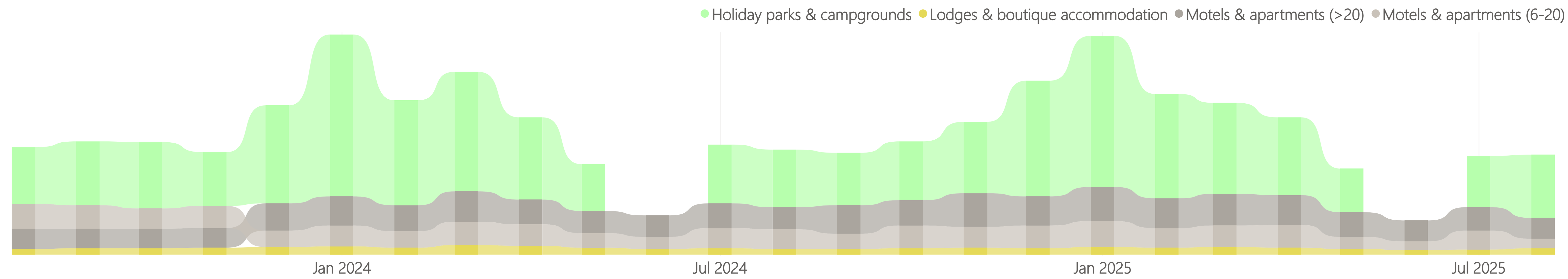
Accommodation by Type

Mackenzie Region - August 2025

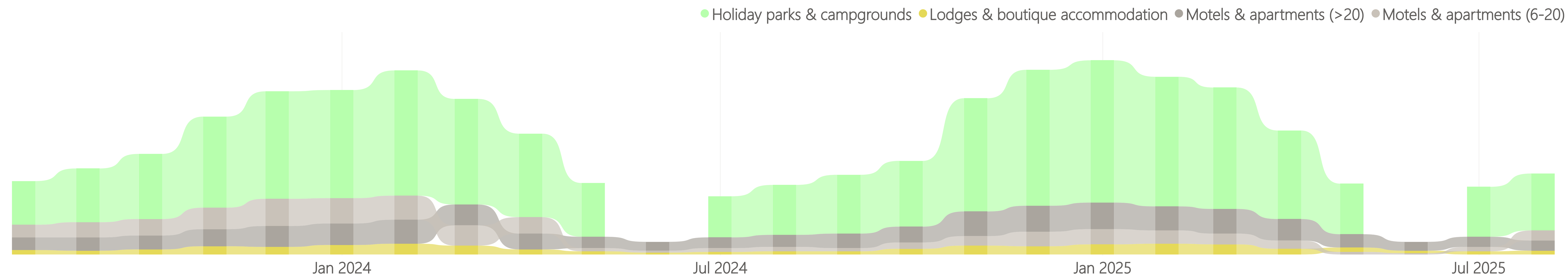
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.

> The domestic/international market mix for guest nights (domestic: 0% YoY, international: +10% YoY) was variable among similar-sized South Island RTO regions, especially when considering domestic guest nights (West Coast: -18% YoY, Southland: +6% YoY, Marlborough: -3% YoY). International guest night results for RTO regions of a similar scale were more cohesive in their growth (West Coast: +6% YoY, Fiordland: +13% YoY, Dunedin: +17% YoY).

Domestic Guest Nights — Ranked by Accommodation Type



International Guest Nights — Ranked by Accommodation Type



Guest Nights — Trends by Market

Employment Overview

Mackenzie Region - August 2025

Employment statistics from select tourism-related industries are used as a gauge for tourism's regional economic contribution. While not a comprehensive measure of all tourism employment, it does provide insights into filled job numbers and earnings within those specified industries.

> Tourism-related employment grew by +2% YoY, slightly ahead of the national average (-1% YoY), and was generally ahead of similar-sized RTO regions across the South Island (Clutha: -5% YoY, Hurunui: 0%, Waitaki: +3% YoY). Tourism-related employment growth was driven solely by travel and tour services (+11% YoY) as an industry of tourism-related employment, with the net effect being reduced by a decline in accommodation (-4% YoY).

Month at a Glance

Industry	Filled Jobs	Share of Filled Jobs	YoY Filled Jobs	Employment Earnings	Share of Employment Earnings	YoY Employment Earnings
Total Select Tourism Industries	650		▲2%	$2.927M		▲3%
Accommodation	260	40.0%	▼-4%	$1.169M	39.9%	▲0%
Food and Beverage Services	200	30.8%	▲0%	$0.787M	26.9%	▼-2%
Recreation Services	60	9.2%	▼-8%	$0.263M	9.0%	▼-1%
Activity Services	50	7.7%	-			-
Travel and Tour Services	50	7.7%	▲11%	$0.274M	9.4%	▲12%
Confidentiality Residual	30	4.6%	▼-25%	$0.434M	14.8%	▲77%
Air Passenger Transport Services			-			-
Transport Services			-			-
Transport Support Services			-			-

Monthly Filled Jobs by Industry

Filled Jobs in Tourism-Related Industries

RTO	Filled Jobs Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Average Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	27,650	65.3%	▲0%		65.6%	▲2%
Queenstown	8,400	19.8%	▲1%		18.8%	▲3%
West Coast	1,920	4.5%	▼-4%		5.0%	▲0%
Timaru	1,690	4.0%	▲0%		4.1%	▼-2%
Waitaki	950	2.2%	▲3%		2.3%	▲3%
Hurunui	780	1.8%	▲0%		1.9%	▼-1%
Mackenzie	650	1.5%	▲2%		1.6%	▼-1%
Kaikoura	330	0.8%	▲3%		0.9%	▼-1%
All NZ	478,705		▼-1%			▲0%

Employment Earnings in Tourism-Related Industries

RTO	Employment Earnings Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	$121M	65.6%	▲1%	$1.6B	65.8%	▲6%
Queenstown	$40.4M	21.9%	▲4%	$499M	20.9%	▲8%
West Coast	$6.9M	3.8%	▼-4%	$103M	4.3%	▲3%
Timaru	$5.8M	3.1%	▲5%	$73.8M	3.1%	▲4%
Hurunui	$3.1M	1.7%	▲3%	$42.1M	1.8%	▲5%
Waitaki	$2.9M	1.6%	▲0%	$39.9M	1.7%	▲6%
Mackenzie	$2.9M	1.6%	▲3%	$39.4M	1.7%	▲4%
Kaikoura	$1.4M	0.8%	▲5%	$18.9M	0.8%	▲6%
All NZ	$2.1B		▲1%	$26.5B		▲5%

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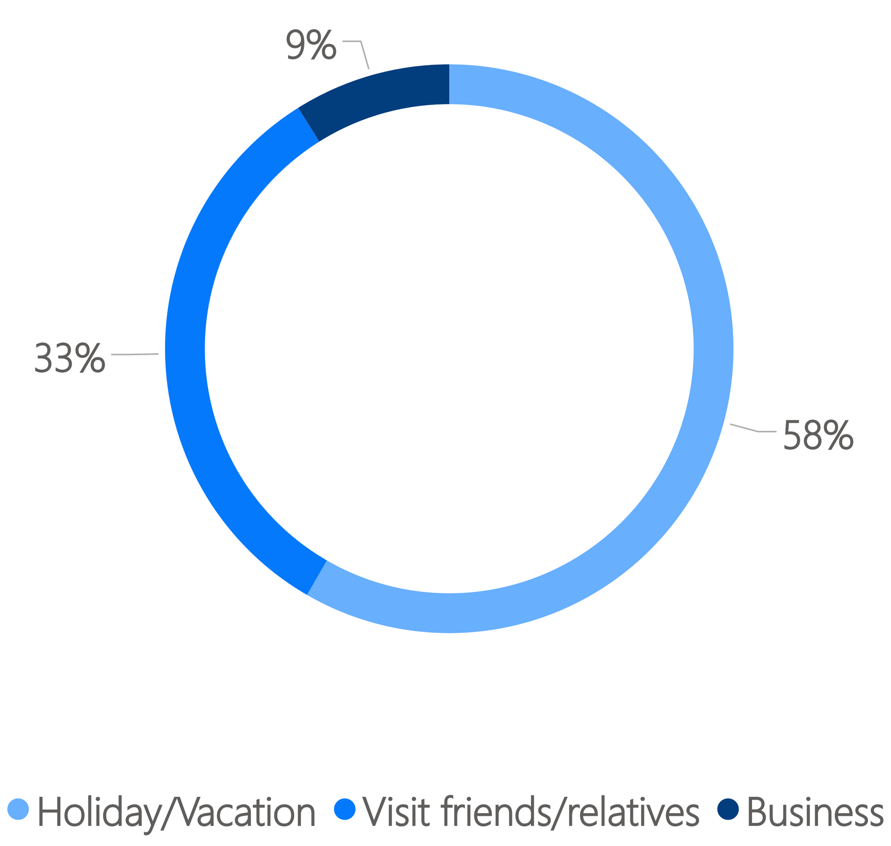
Visitor Arrivals

New Zealand - August 2025

Visitor Arrivals data tracks individuals entering New Zealand who reside overseas and plan to stay for under a year. This includes those coming for temporary work or short-term education. Cruise ship passengers, typically classified as in-transit, are usually excluded from these statistics.

Month at a Glance

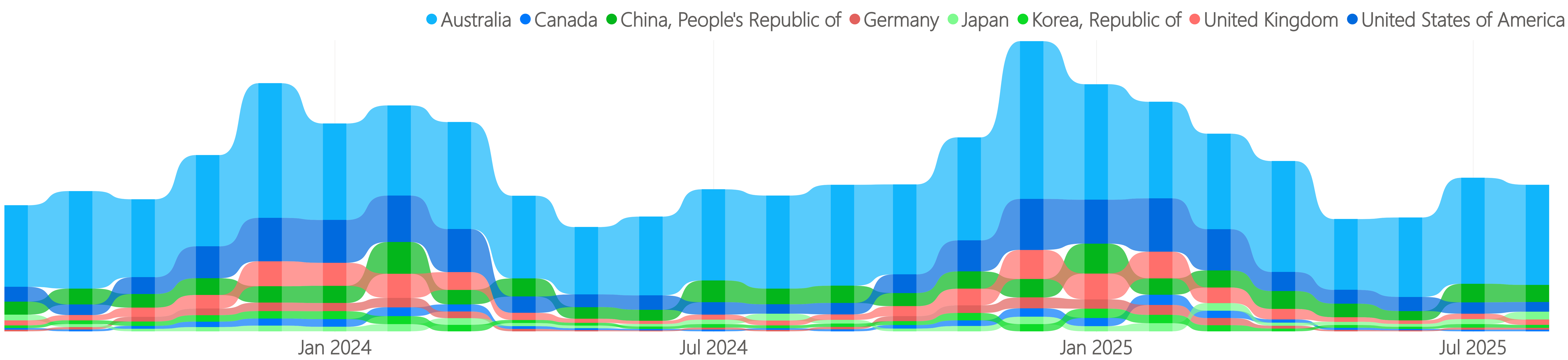
Arrivals by Travel Purpose



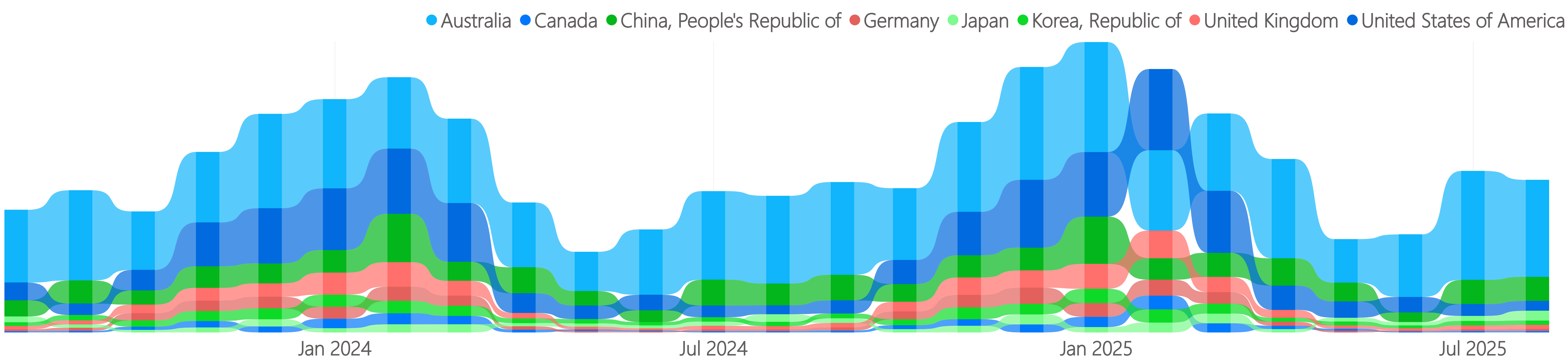
International Visitor Arrivals by Port

Total	AKL	CHC	ZQN	WLG
230K	140K	26.8K	49.4K	11.1K
vs. Aug '24 ▲7%	vs. Aug '24 ▲5%	vs. Aug '24 ▲17%	vs. Aug '24 ▲6%	vs. Aug '24 ▲5%
vs. Aug '19 ▼-8%	vs. Aug '19 ▼-16%	vs. Aug '19 ▼-12%	vs. Aug '19 ▲26%	vs. Aug '19 ▼-23%

Visitor Arrivals by International Market



Vacation Traveller Arrivals by International Market



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