Monthly Destination Performance Report

Mackenzie Region - July 2025

Mackenzie Region

Visitor Card Spending

	Domestic	International
	4.1M$	3.5M$
vs. Jul '24	-7%	24%
All NZ	-5%	3%

Accommodation Occupancy

	Commercial	Short-term Rental
	45%	60%
vs. Jul '24	1%pt.	3%pt.
All NZ	-1%pt.	9%pt.

Tourism-related Employment

	Filled Jobs	Employment Earnings
	650	3.7M$
vs. Jul '24	-3%	3%
All NZ	1%	4%

%pt. - arithmetic difference between the two percentages

Summary

Mackenzie domestic spend dips, international spend soars, stable nights, fewer jobs
July was a challenging month for the Mackenzie District's tourism sector. Domestic card spend declined, driven by a significant drop in spending from the key Auckland market. International card spend, however, rose significantly. Despite a positive trend of an increase in guest arrivals, commercial accommodation experienced a near net-zero change in guest nights and a slight increase in occupancy due to fewer available stay units. Tourism-related employment for the month declined.

Domestic spending stays flat, while international spending sees uplift
A decrease in total domestic card spend (-7% YoY) when compared with the domestic guest night decline of -5% YoY indicated little change in average spend or the prevalence of day trip visitation. The international card spend increase of +24% YoY against the international guest night rise of +7% YoY suggested an increase in average spend, or the prevalence of day trip visitation.

Tourism spending sees strong gains in retail and beyond
When segmenting international card spend by product, all product categories showed positive growth, notably retail fuel (+30% YoY), food and beverage retail (+19% YoY), and serving (+16% YoY). For domestic card spend, accommodation increased by +21% YoY and 'other tourism' grew strongly by +133% YoY.

Domestic spend shows shifting trends, Bay of Plenty leads
Domestic card spend declined by -7% YoY in July, which was just behind the national average (-5% YoY). Visitor card spend from the Bay of Plenty market showed the largest growth (+37% YoY), while Auckland saw a significant top-market decline (-32% YoY). Otago, as a significant market, grew by +8% YoY, with Canterbury declining by -2% YoY. Spend from Wellington declined by -38% in July, which reduced its position to the fifth-highest market for total domestic spend.

International spending up, Australia leads visitor dollar share
International card spend grew strongly by +24% YoY in July, significantly ahead of the national average (+3% YoY). Large growth in the neighbouring RTO regions of Waitaki (+26% YoY) and Central Otago (+50% YoY) suggested a significant increase in visitor volume. Spend from Australia grew by +11% YoY in July, which placed it as the top market for total international spend (over 20% share). The US was fractionally behind (under 20% share), growing by +8% YoY.

Slight occupancy rise, stable guest nights, strong short-term rental demand
Commercial accommodation experienced a near net-zero change in July, with total guest nights remaining stable (0% YoY) and occupancy increasing slightly by +1%pt. YoY. Guest arrivals grew by +3% YoY, whilst the average stay length decreased by -3% YoY, resulting in the net-zero change in guest nights. A decrease in available stay units (-4% YoY) helped to increase the occupancy rate, even though guest nights remained the same (0% YoY). Short-term rental daily occupancy rates varied between 70% and 81% over the first week of July, which showed strong visitation in the last week of the term two school holidays.

Subtle gains in holiday parks as arrivals lead growth
As the largest accommodation type, holiday parks and campgrounds (accounting for 61% of total guest nights) grew by +1% YoY in guest nights, driven by guest arrivals (+7% YoY) after reopening for the shoulder season. Most other accommodation types realised gains in average stay length rather than guest arrivals (large motels and apartments: +4% YoY, smaller motels and apartments: +3% YoY, lodges and boutique accommodation: 0% YoY).

Mackenzie's tourism jobs down, but travel services grow
Tourism-related employment decreased by -3% YoY for the Mackenzie Region in July, a result that contrasted with the majority of other South Island RTO regions, which saw increases (for example, Timaru: +2% YoY, Canterbury: +2% YoY, and Waitaki: +7% YoY). Within tourism-related employment industries, travel and tour services was the only reported area to grow (+20% YoY), while declines were seen in accommodation (-7% YoY), food and beverage services (-5% YoY), and recreation services (-13% YoY).

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Card Spend	Accommodation	Employment	Visitor Arrivals

Note: Due to a pause in the publication of MBIE TECTs, July figures are estimates based on Vistr proprietary modelling.

Card Spend Overview

Mackenzie Region - July 2025

This data shows spending made via electronic cards, broken down by industry categories (ANZSIC Product categories) and source markets. Please note that because this data only includes card payments, comparisons between different visitor groups should be made carefully, as cash payment habits can vary significantly.

> When segmenting international card spend by product, all product categories showed positive growth, notably retail fuel (+30% YoY), food and beverage retail (+19% YoY), and serving (+16% YoY). For domestic card spend, accommodation increased by +21% YoY and 'other tourism' grew strongly by +133% YoY.

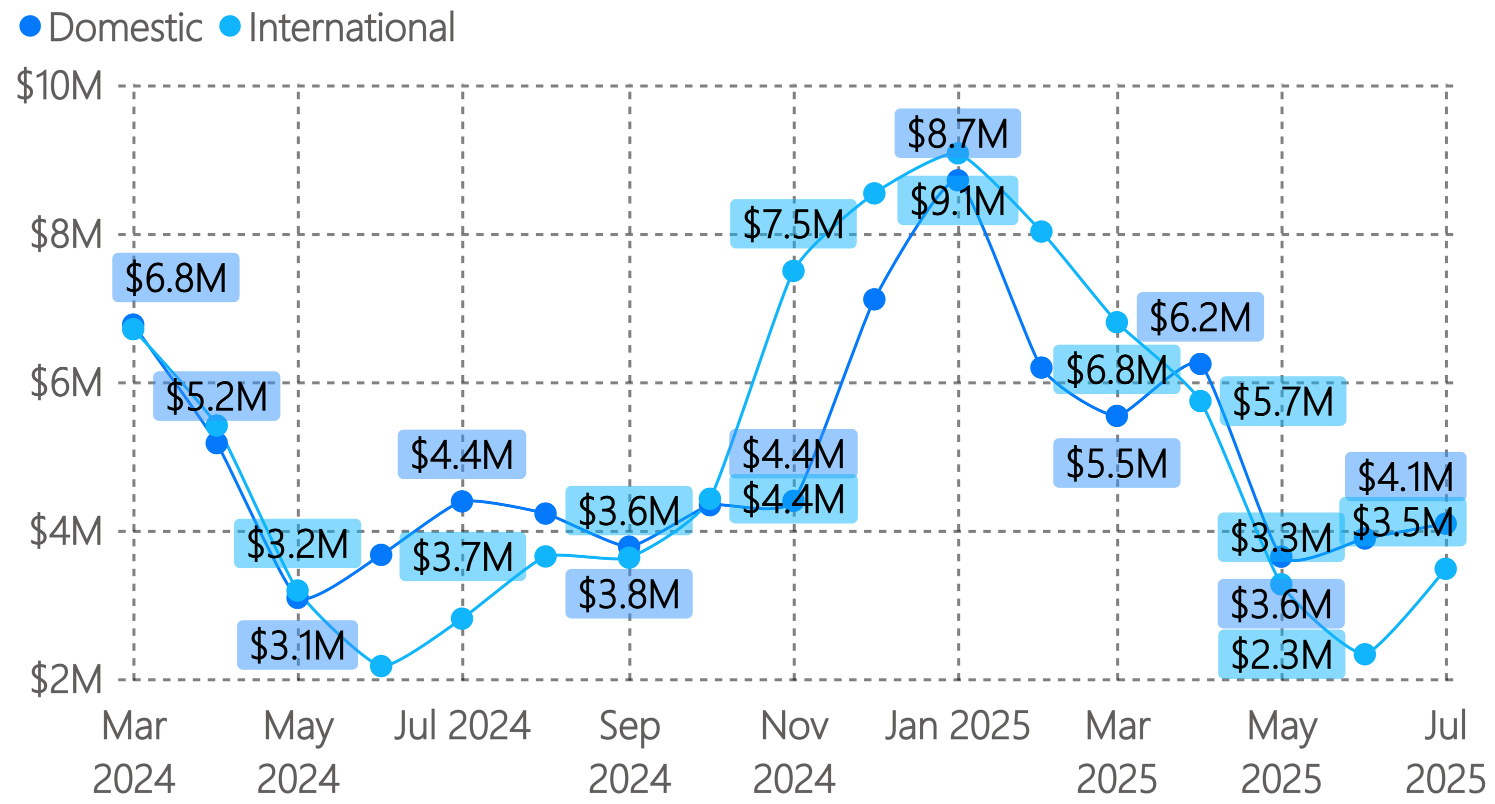
Card Spend

Domestic	International	Year-Ending Domestic	Year-Ending International
4.1M$	3.5M$	62.2M$	66.5M$
vs. Jul '24	vs. Jul '24	vs. Jul '24	vs. Jul '24
▼ -7%	▲ 24%	▼ -6%	▲ 4%

Card Spend Trends

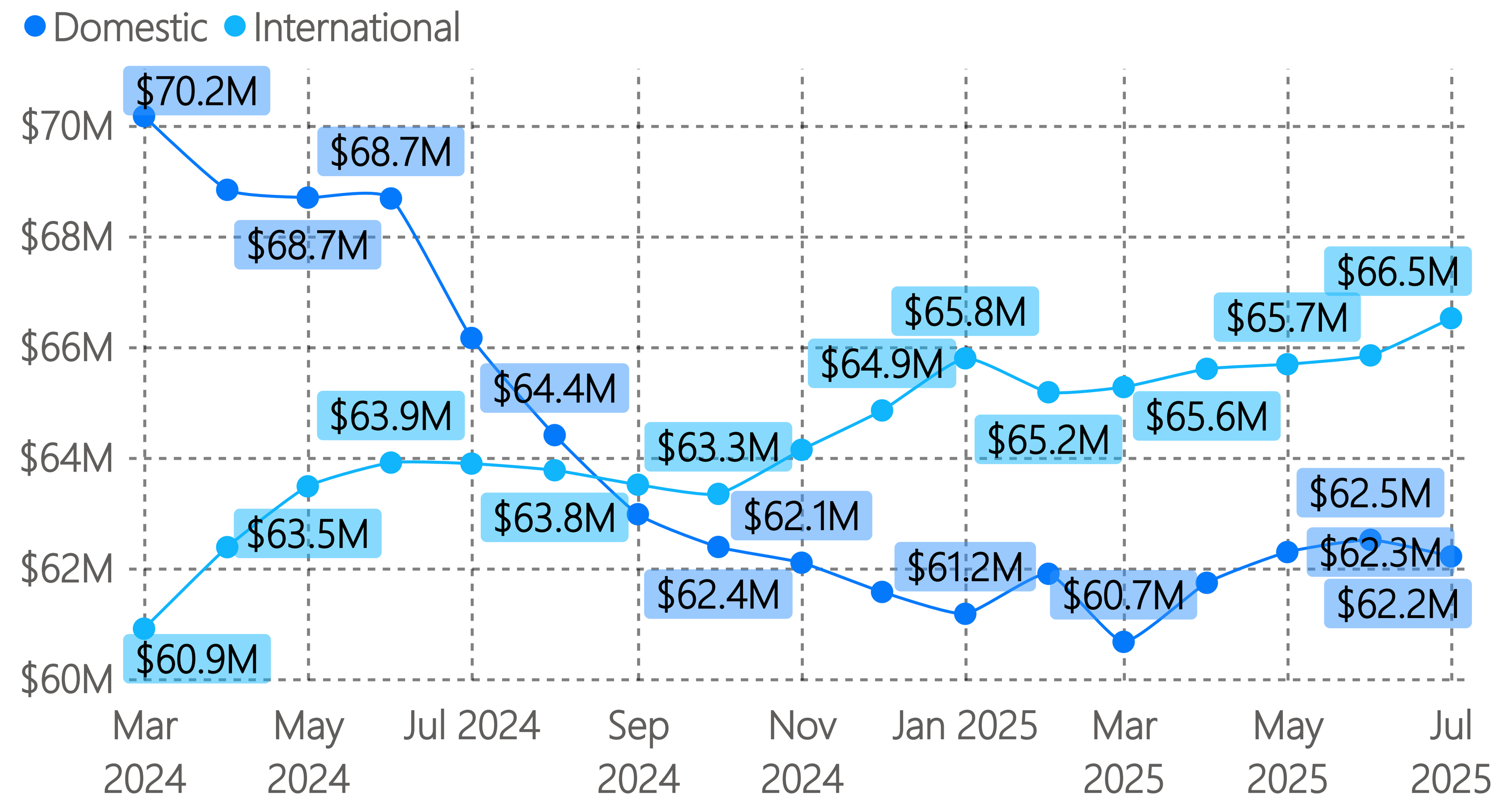
Monthly Card Spend

● Domestic ● International



Year-Ending Card Spend

● Domestic ● International



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
All NZ	837M		▼-5%	11.0B		▼-3%
Canterbury	80.8M	60.3%	▼-1%	949M	55.4%	▼-4%
Central Otago	6.3M	4.7%	▼0%	108M	6.3%	▼-10%
Hurunui	7.5M	5.6%	▲1%	93.6M	5.5%	▲1%
Kaikoura	3.4M	2.5%	▼-4%	58.3M	3.4%	▲4%
Mackenzie	4.1M	3.1%	▼-7%	62.2M	3.6%	▼-6%
Timaru	14.0M	10.5%	▲0%	181M	10.6%	▼-5%
Waitaki	8.0M	6.0%	▼-1%	110M	6.4%	▼-3%
West Coast	9.9M	7.4%	▲1%	151M	8.8%	▲2%

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
Canterbury	23.1M	66.1%	▲8%	385M	59.7%	▲8%
West Coast	2.8M	8.1%	▲8%	85.6M	13.3%	▼-5%
Mackenzie	3.5M	10.0%	▲24%	66.5M	10.3%	▲4%
Kaikoura	1.0M	3.0%	▲13%	28.4M	4.4%	▲3%
Waitaki	1.2M	3.4%	▲26%	22.8M	3.5%	▲8%
Timaru	1.1M	3.2%	▲22%	20.2M	3.1%	▲9%
Central Otago	1.2M	3.4%	▲50%	19.5M	3.0%	▲3%
Hurunui	1.0M	3.0%	▲41%	16.0M	2.5%	▼-3%
All NZ	242M		▲3%	4.0B		▲6%

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Card Spend by Product

Mackenzie Region - July 2025

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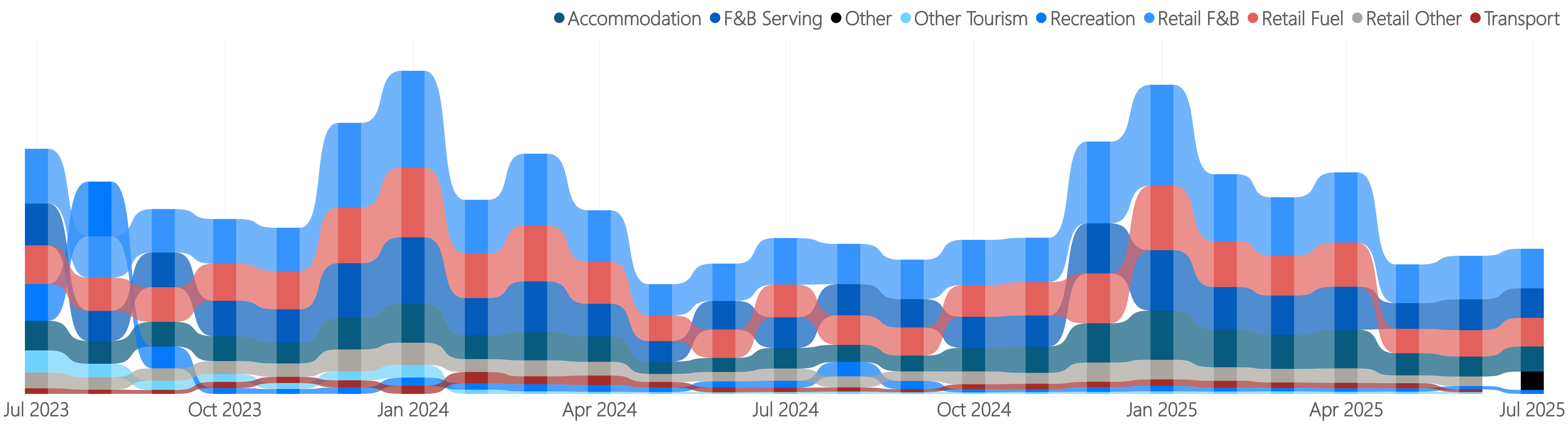
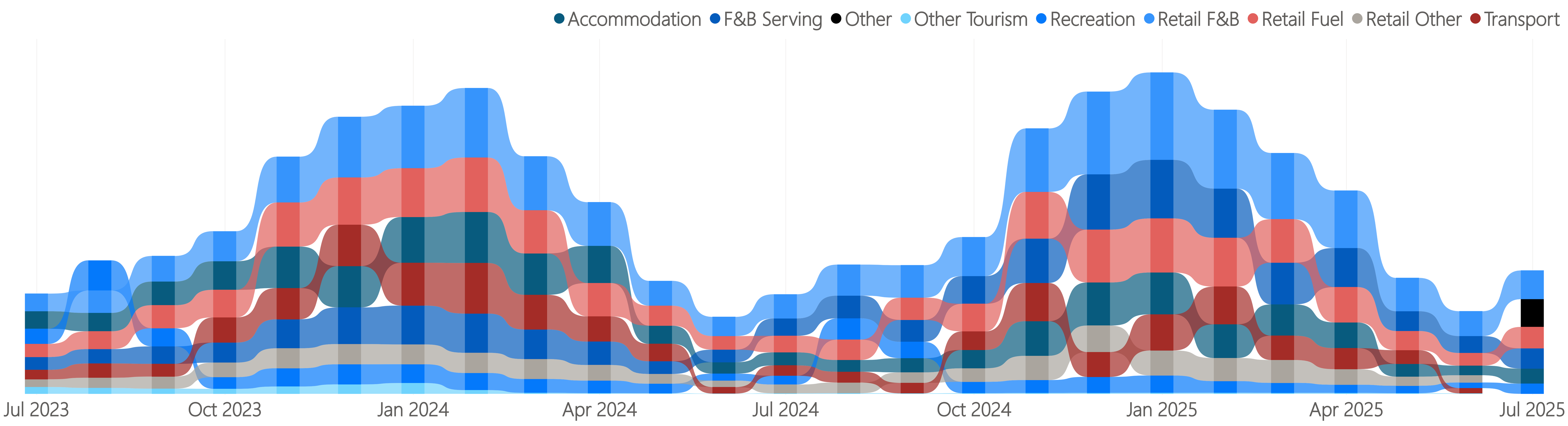
Product Overview

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	$1,112,058	27.2%	▼-15%	▲29%	$811,471	23.3%	▲19%	▲164%
F&B Serving	$838,668	20.5%	▼-2%	▼-8%	$570,669	16.4%	▲16%	▲57%
Retail Fuel	$805,164	19.7%	▼-13%	▲15%	$607,183	17.4%	▲30%	▲108%
Accommodation	$710,136	17.3%	▲21%	▼-21%	$425,638	12.2%	▲15%	▼-38%
Other	$515,565	12.6%	-	-	$783,312	22.5%	-	-
Recreation	$111,979	2.7%	▼-42%	▼-83%	$287,593	8.3%	▲16%	▲0%

Domestic Card Spend — Ranked by Product Type



International Card Spend — Ranked by Product Type



Card Spend | **Accommodation** | **Employment** | **Visitor Arrivals**

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Card Spend by Product

Mackenzie Region - July 2025

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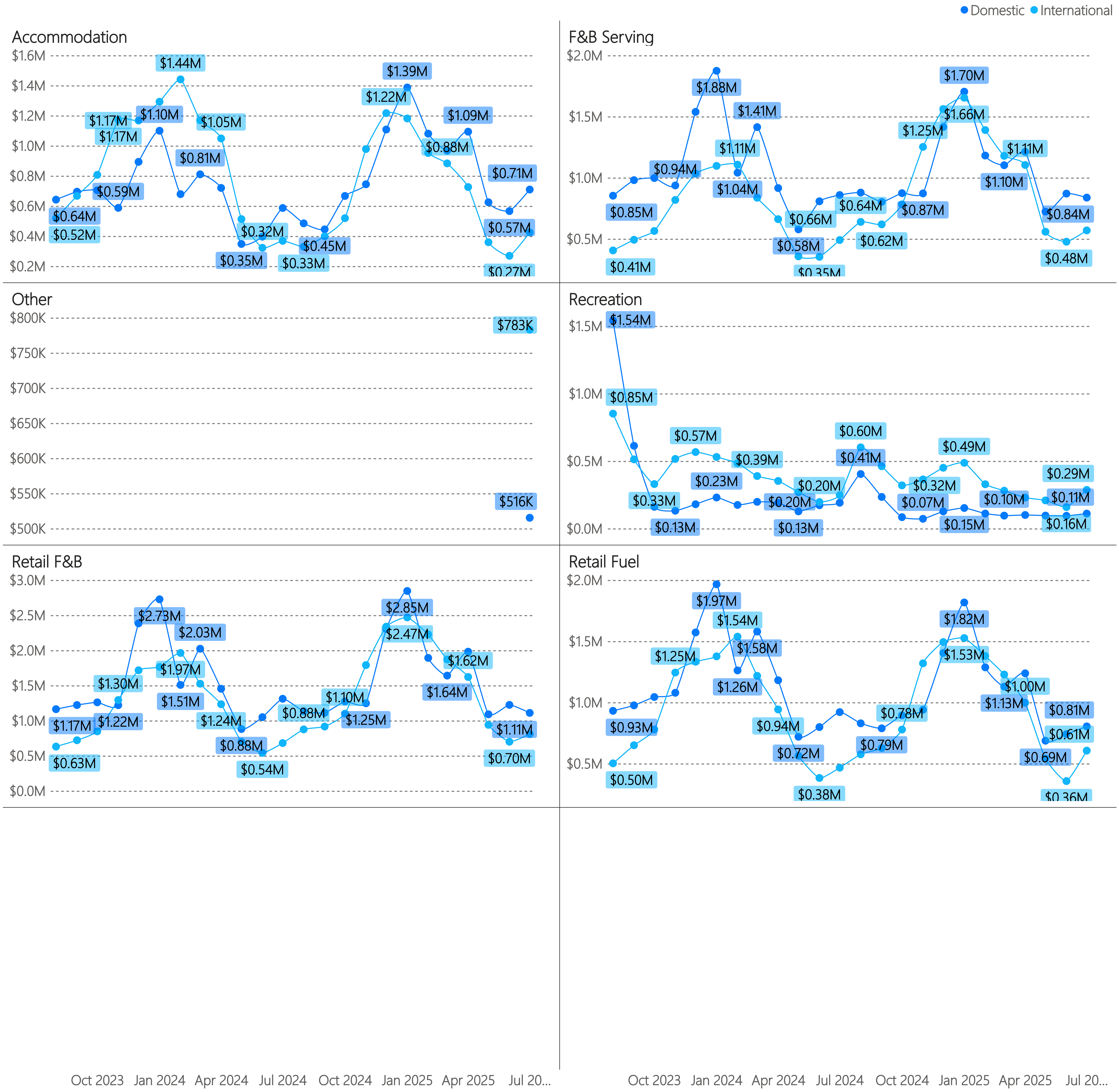
Trends by Product



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Card Spend | Accommodation | Employment | Visitor Arrivals

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Domestic Card Spend

Mackenzie Region - July 2025

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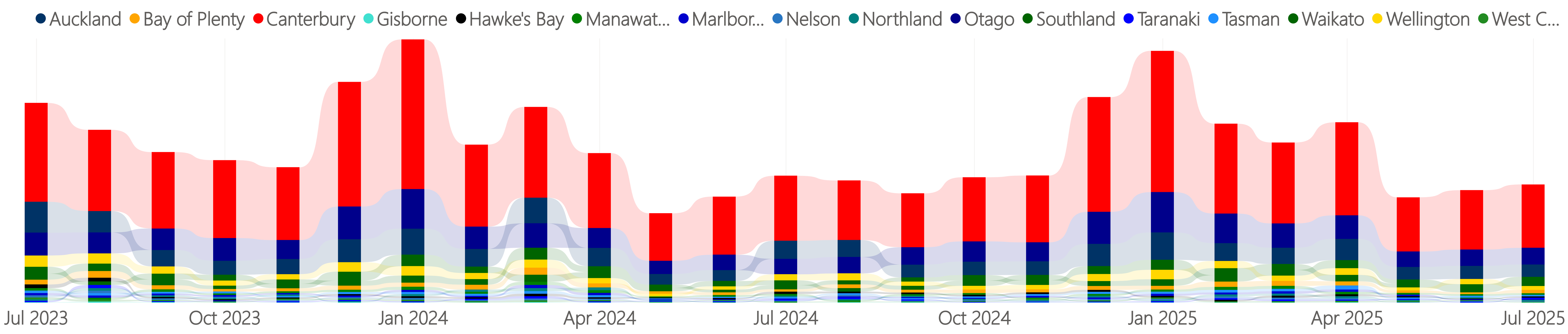
> Domestic card spend declined by -7% YoY in July, which was just behind the national average (-5% YoY). Visitor card spend from the Bay of Plenty market showed the largest growth (+37% YoY), while Auckland saw a significant top-market decline (-32% YoY). Otago, as a significant market, grew by +8% YoY, with Canterbury declining by -2% YoY.

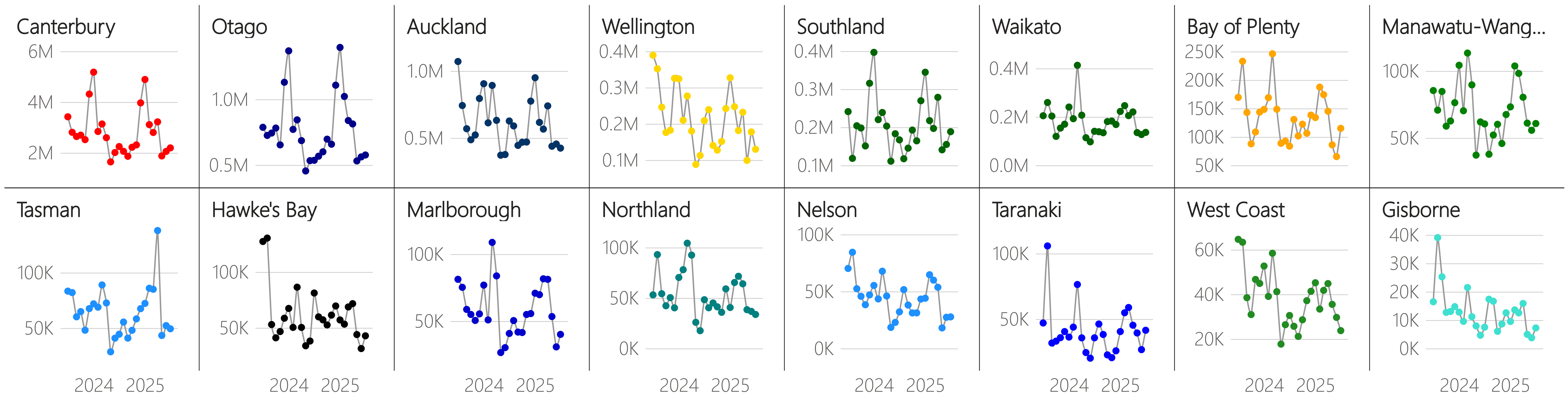
Domestic Spend — Table by Market

NZ Region	Domestic Card Spend	Share of Domestic Card Spend	YoY Domestic Card Spend	Domestic Card Spend vs. 2019
Canterbury	$2,195,272	53.6%	▼-2%	▼-15%
Otago	$576,835	14.1%	▲8%	▲6%
Auckland	$424,674	10.4%	▼-32%	▼-36%
Southland	$188,506	4.6%	▲13%	▼-5%
Waikato	$136,148	3.3%	▼-3%	▲2%
Wellington	$129,820	3.2%	▼-38%	▼-44%
Bay of Plenty	$115,113	2.8%	▲37%	▲40%
Manawatu-Wanganui	$60,842	1.5%	▲0%	▲51%
Tasman	$49,398	1.2%	▲11%	▲43%
Hawke's Bay	$42,856	1.0%	▼-47%	▼-57%
Taranaki	$41,513	1.0%	▲16%	▲22%
Marlborough	$40,113	1.0%	▼-2%	▲1%
Northland	$33,731	0.8%	▼-30%	▼-33%
Nelson	$27,740	0.7%	▼-14%	▼-38%
West Coast	$23,753	0.6%	▼-22%	▼-50%
Gisborne	$7,257	0.2%	▼-3%	▼-24%

Domestic Spend — Ranked by Market



Card Spend Trends — by Domestic Market



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International Card Spend

Mackenzie Region - July 2025

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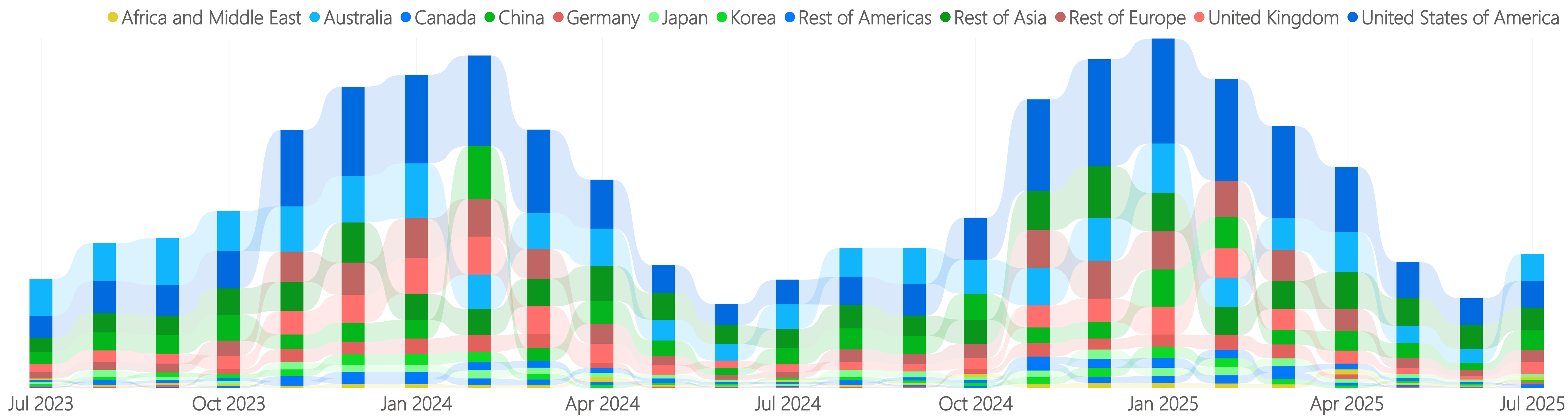
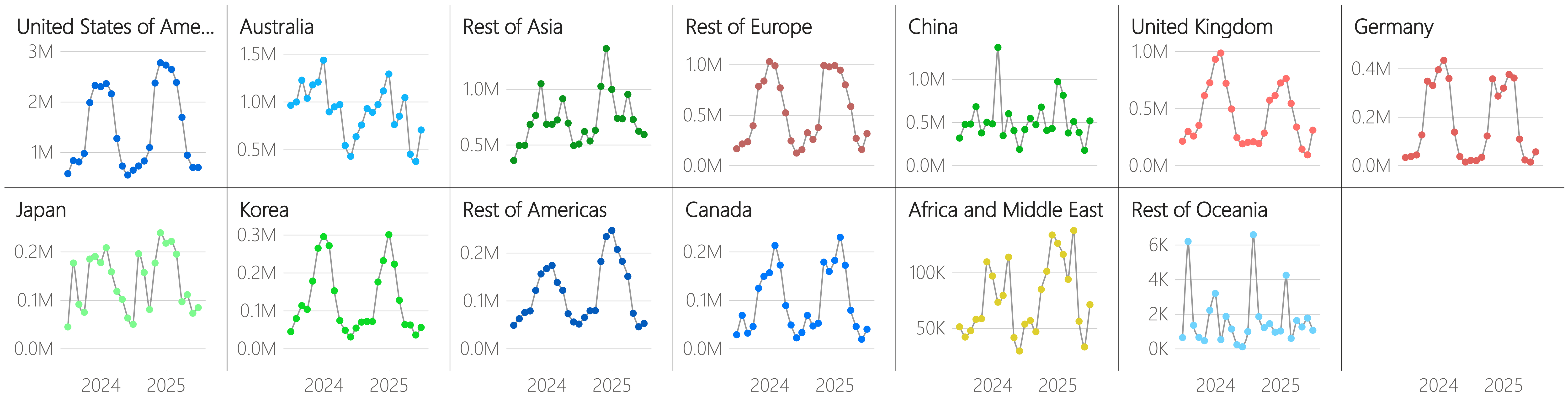
International Spend — Table by Market

Overseas Markets	International Card Spend	Share of International Card Spend	YoY International Card Spend	International Card Spend vs. 2019
Australia	$703,576	20.2%	▲11%	▼-36%
United States of America	$694,232	19.9%	▲8%	▲201%
Rest of Asia	$590,818	16.9%	▲17%	▲101%
China	$514,969	14.8%	▲24%	▲75%
Rest of Europe	$314,077	9.0%	▲104%	▲157%
United Kingdom	$308,843	8.9%	▲53%	▲91%
Japan	$84,168	2.4%	▲68%	▲27%
Africa and Middle East	$70,978	2.0%	▲33%	▲199%
Korea	$55,651	1.6%	▲3%	▲68%
Germany	$55,488	1.6%	▲170%	▲34%
Rest of Americas	$52,236	1.5%	▲2%	▲70%
Canada	$39,774	1.1%	▲21%	▼-3%
Rest of Oceania	$1,056	0.0%	▲8%	▲218%

International Spend — Ranked by Market



Card Spend Trends — by International Markets



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Accommodation Overview

Mackenzie Region - July 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 experienced a near net-zero change in July, with total guest nights remaining stable (0% YoY) and occupancy increasing slightly by +1%pt. YoY. Guest arrivals grew by +3% YoY, whilst the average stay length decreased by -3% YoY, resulting in the net-zero change in guest nights.

Commercial Accommodation

Occupancy	Guest Nights	Available Stay Units	Average Stay Length	Guest Arrivals
45%	48.9K	57.1K	1.7	28.3K
vs. Jul '24	vs. Jul '24	vs. Jul '24	vs. Jul '24	vs. Jul '24
↑ 1%pt.	▲ 0%	▼ -4%	▼ -3%	▲ 3%

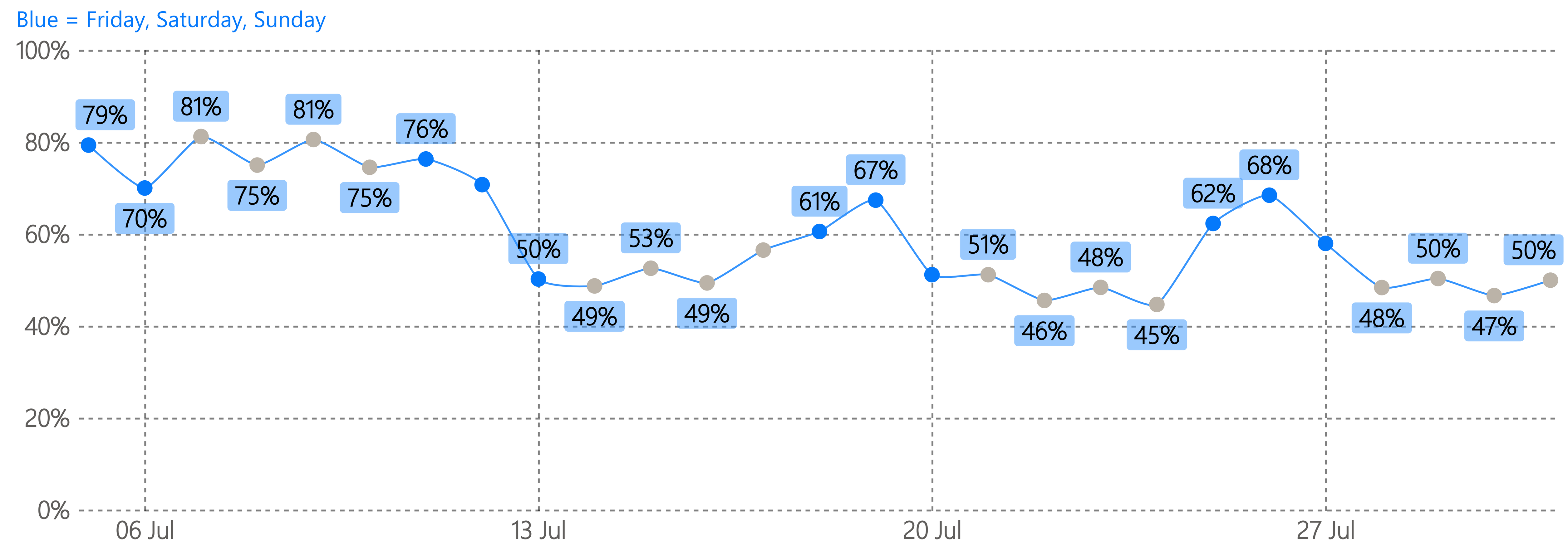
Short-term Rental Accommodation

Occupancy

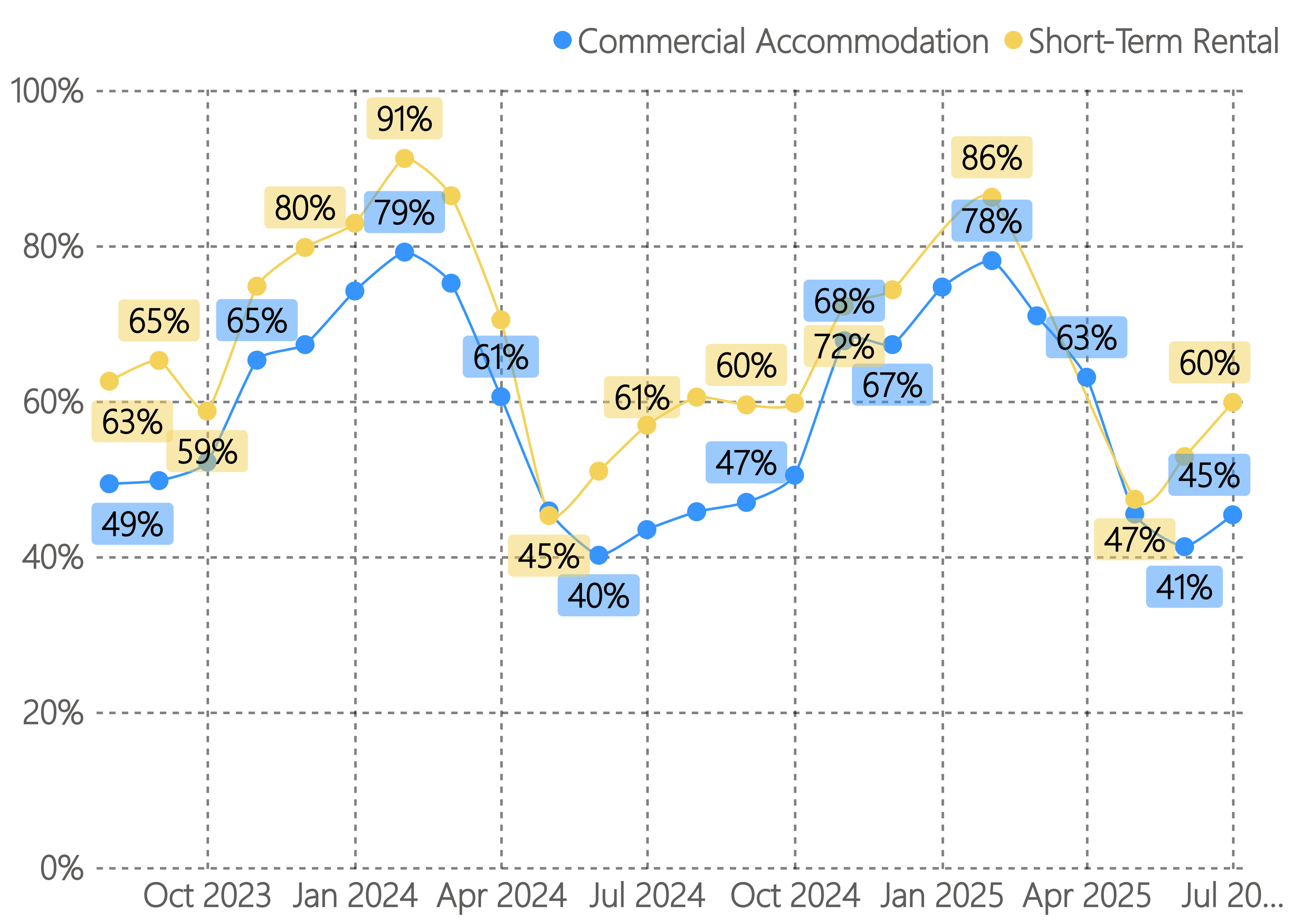
60%

vs. Jul '24

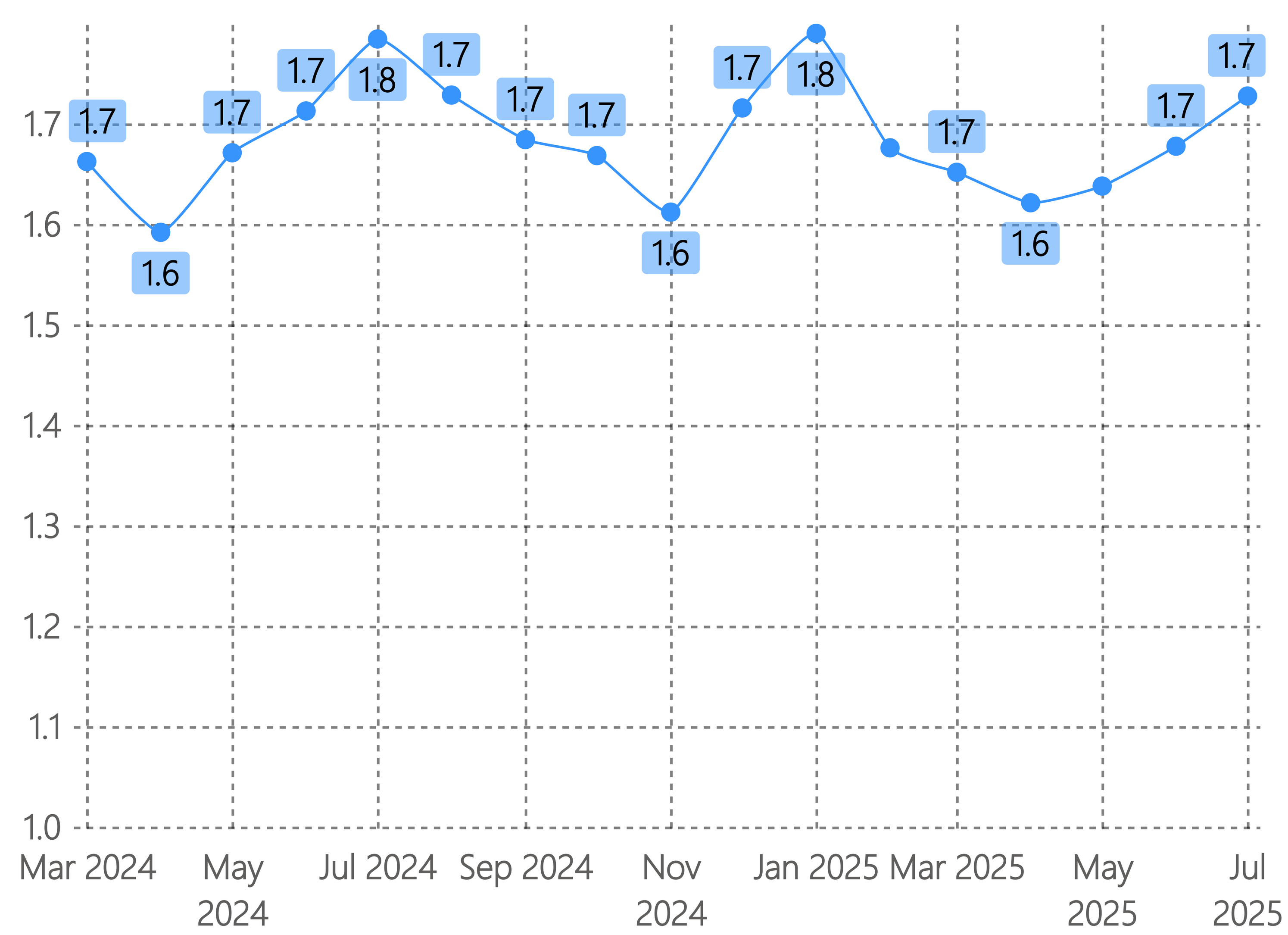
↑ 3%pt.



Occupancy



Average Stay Length in Commercial Accommodation



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Accommodation Overview

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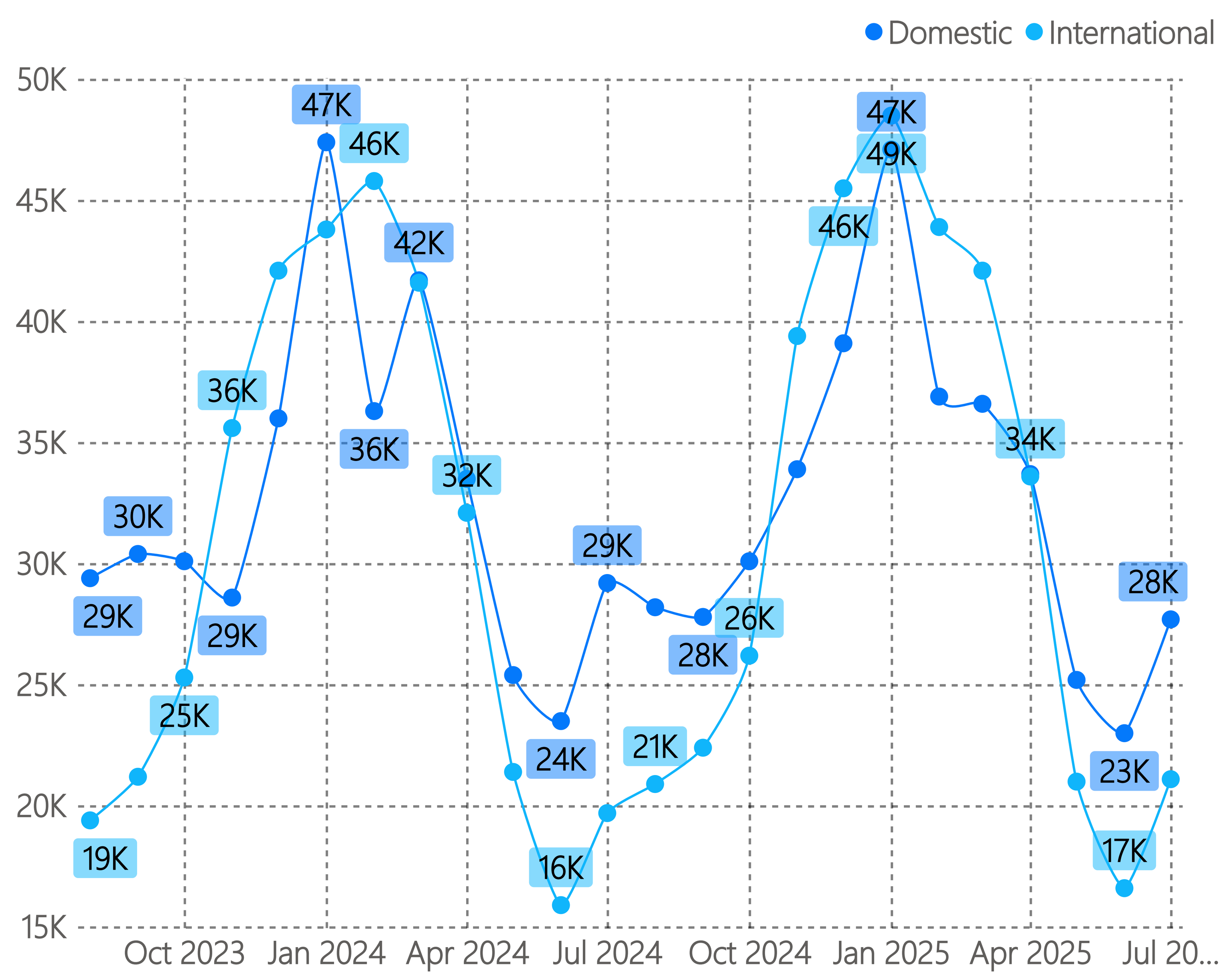
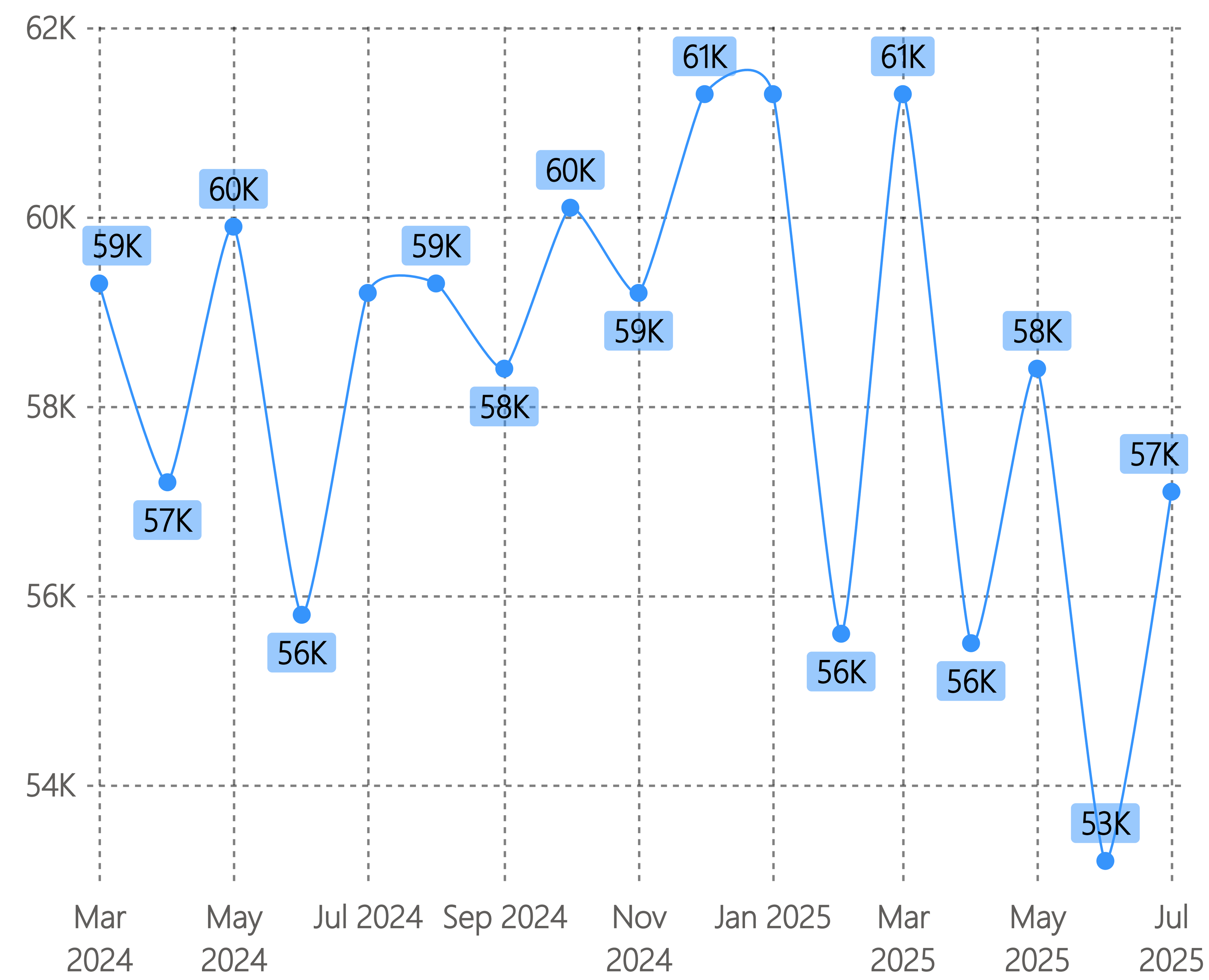
Guest Nights in Commercial Accommodation



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	183K	55.5%	▲1%	2.4M	49.3%	▲2%
West Coast	32K	9.6%	▼-13%	614K	12.6%	▼-1%
Mackenzie	28K	8.4%	▼-5%	389K	8.0%	▼-1%
Hurunui	21K	6.4%	▼-3%	290K	6.0%	▼-8%
Waitaki	19K	5.7%	▼-10%	319K	6.6%	▼-2%
Kaikoura	18K	5.4%	▲15%	318K	6.5%	▲4%
Timaru	18K	5.4%	▲2%	301K	6.2%	▼-3%
Central Otago	12K	3.7%	▲6%	232K	4.8%	▼-17%
All NZ	1.7M		▼-2%	25.6M		▼-1%

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
Canterbury	78K	54.9%	▲18%	1.4M	46.5%	▲2%
Mackenzie	21K	14.9%	▲7%	381K	12.9%	▲5%
West Coast	20K	14.4%	▼0%	670K	22.7%	▼-5%
Waitaki	8K	5.3%	▼-4%	152K	5.1%	▲6%
Kaikoura	7K	4.9%	▲1%	194K	6.6%	▼-3%
Hurunui	3K	2.1%	▼-21%	70K	2.4%	▲2%
Timaru	3K	2.0%	▼-3%	71K	2.4%	▼0%
Central Otago	2K	1.6%	▲16%	43K	1.5%	▼-11%
All NZ	785K		▲4%	13.6M		▲2%

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Accommodation by Type

Mackenzie Region - July 2025

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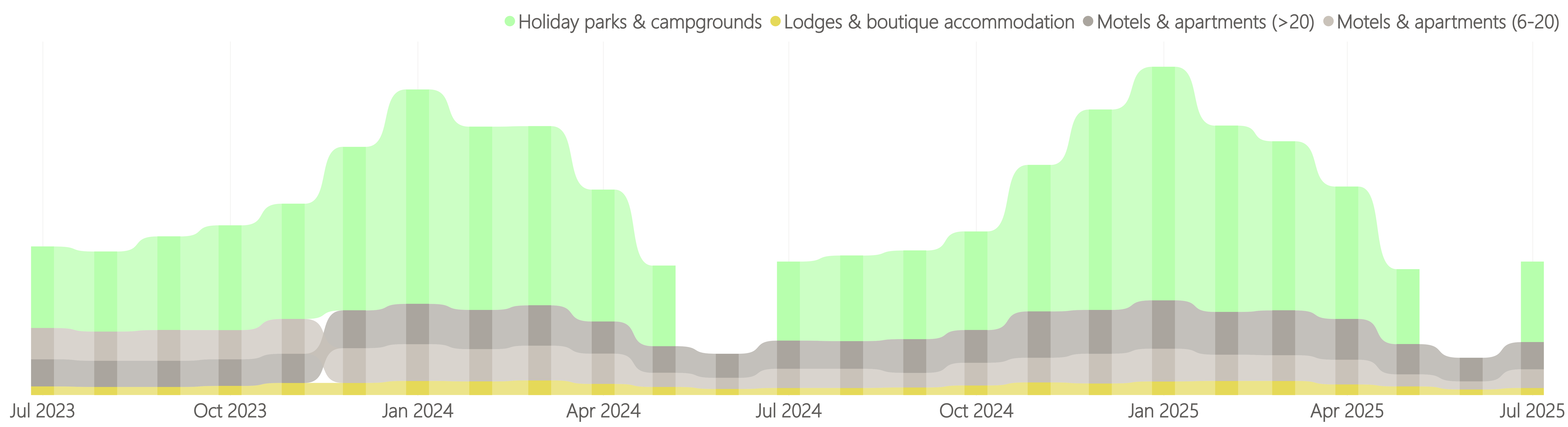
> As the largest accommodation type, holiday parks and campgrounds (accounting for 61% of total guest nights) grew by +1% YoY in guest nights, driven by guest arrivals (+7% YoY) after reopening for the shoulder season. Most other accommodation types realised gains in average stay length rather than guest arrivals (large motels and apartments: +4% YoY, smaller motels and apartments: +3% YoY, lodges and boutique accommodation: 0% 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	11,000	68.8%	▲7%	16,000	60.8%	▲1%	1.5	▼-5%	23,700	▼-10%	0.27	↑ 2%pt.
Motels & apartments (>20)	2,400	15.0%	▼-8%	5,300	20.2%	▼-5%	2.3	▲4%	4,800	▼-2%	0.60	↑ 2%pt.
Motels & apartments (6-20)	1,800	11.3%	▼-5%	3,700	14.1%	▼-3%	2.1	▲3%	2,500	▼-4%	0.76	↑ 3%pt.
Lodges & boutique accommodation	800	5.0%	▲0%	1,300	4.9%	▼-7%	1.8	▲0%	2,200	▲16%	0.34	↓ -4%pt.
Backpackers			-			-		-		-		
Hotels			-			-		-		-		
Total	28,300		▲3%	48,800		▼0%	1.7	▼-3%	57,100	▼-4%	0.45	↑ 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	8,100	51.9%	▼-13%	7,900	73.8%	▲22%	16,000	60.8%	▲1%
Motels & apartments (>20)	3,700	23.7%	▼-5%	1,600	15.0%	▼-6%	5,300	20.2%	▼-5%
Motels & apartments (6-20)	3,000	19.2%	▼-6%	700	6.5%	▲17%	3,700	14.1%	▼-3%
Lodges & boutique accommodation	800	5.1%	▼-20%	500	4.7%	▲25%	1,300	4.9%	▼-7%
Backpackers			-			-			-
Hotels			-			-			-
Total	27,700		▼-5%	21,100		▲7%	48,800		▼0%

Card Spend | **Accommodation** | Employment | Visitor Arrivals

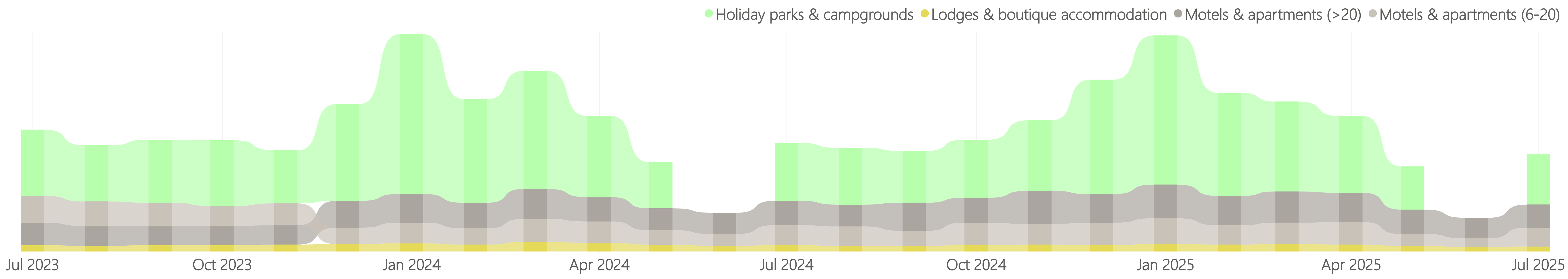
Accommodation by Type

Mackenzie Region - July 2025

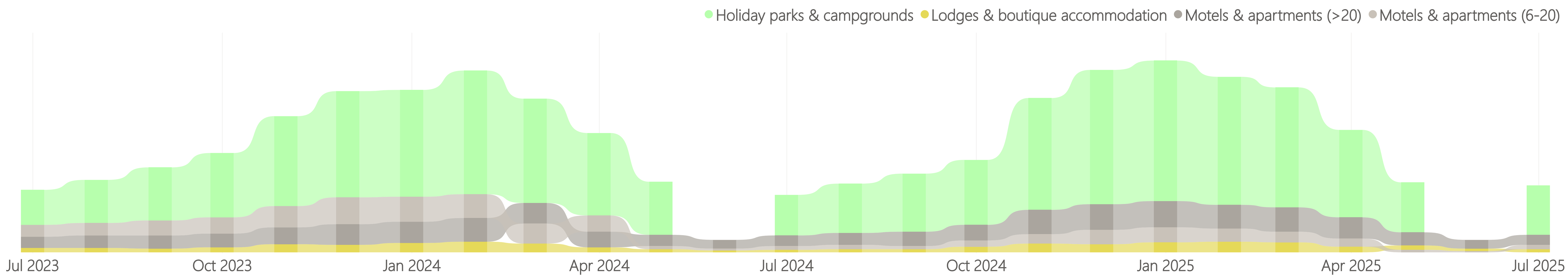
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights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

> As the largest accommodation type, holiday parks and campgrounds (accounting for 61% of total guest nights) grew by +1% YoY in guest nights, driven by guest arrivals (+7% YoY) after reopening for the shoulder season. Most other accommodation types realised gains in average stay length rather than guest arrivals (large motels and apartments: +4% YoY, smaller motels and apartments: +3% YoY, lodges and boutique accommodation: 0% YoY).

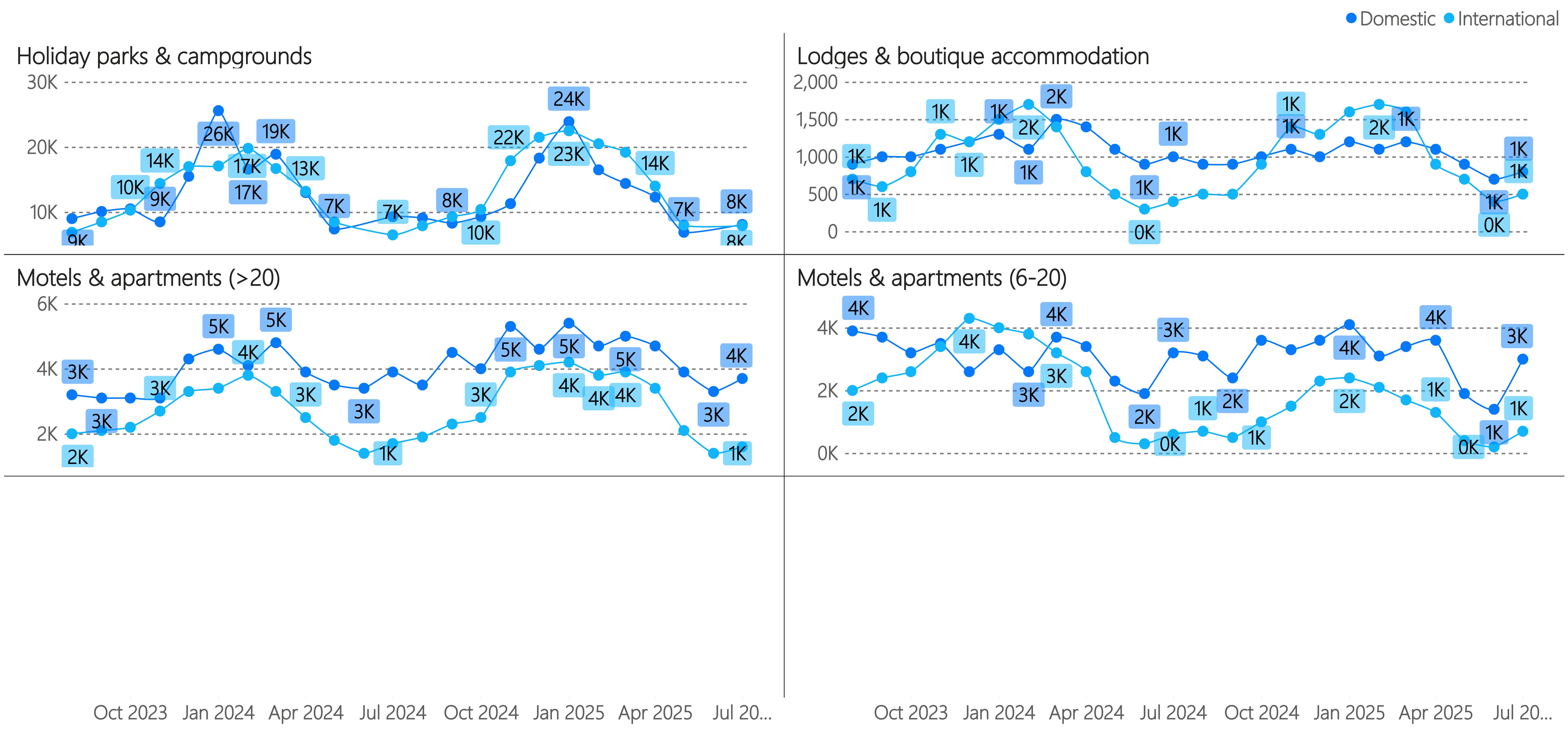
Domestic Guest Nights — Ranked by Accommodation Type



International Guest Nights — Ranked by Accommodation Type



Guest Nights — Trends by Market



Card Spend | Accommodation | **Employment** | Visitor Arrivals

Employment Overview

Mackenzie Region - July 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 decreased by -3% YoY for the Mackenzie Region in July, a result that contrasted with the majority of other South Island RTO regions, which saw increases (for example, Timaru: +2% YoY, Canterbury: +2% YoY, and Waitaki: +7% YoY). Within tourism-related employment industries, travel and tour services was the only reported area to grow (+20% YoY), while declines were seen in accommodation (-7% YoY), food and beverage services (-5% YoY), and recreation services (-13% 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		▼-3%	$3.66M		▲3%
Accommodation	250	38.5%	▼-7%	$1.426M	39.0%	▼-3%
Food and Beverage Services	190	29.2%	▼-5%	$0.941M	25.7%	▲10%
Confidentiality Residual	85	13.1%	▲55%	$0.645M	17.6%	▲71%
Recreation Services	65	10.0%	▼-13%	$0.323M	8.8%	▼-24%
Travel and Tour Services	60	9.2%	▲20%	$0.325M	8.9%	▲31%
Activity Services			-			-
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	27,520	77.3%	▲2%		77.0%	▲2%
West Coast	1,950	5.5%	▼-3%		5.8%	▲1%
Timaru	1,730	4.9%	▲2%		4.8%	▼-2%
Central Otago	1,680	4.7%	▲6%		4.6%	▲4%
Waitaki	950	2.7%	▲7%		2.7%	▲2%
Hurunui	790	2.2%	▲1%		2.2%	▼-1%
Mackenzie	650	1.8%	▼-3%		1.9%	▼-1%
Kaikoura	330	0.9%	▲3%		1.0%	▼-1%
All NZ	477,865		▲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	$149M	80.2%	▲6%	$1.6B	79.4%	▲5%
West Coast	$8.7M	4.7%	▼-3%	$103M	5.2%	▲3%
Central Otago	$8.4M	4.5%	▲10%	$90.1M	4.6%	▲10%
Timaru	$7.1M	3.8%	▲9%	$73.6M	3.7%	▲3%
Hurunui	$3.9M	2.1%	▲7%	$42.0M	2.1%	▲4%
Mackenzie	$3.7M	2.0%	▲3%	$39.3M	2.0%	▲3%
Waitaki	$3.5M	1.9%	▲4%	$39.9M	2.0%	▲5%
Kaikoura	$1.5M	0.8%	▲4%	$18.9M	1.0%	▲6%
All NZ	$2.5B		▲4%	$26.5B		▲3%

Report produced by: vistr Destination Intelligence