

Visitation / Visitor Days		Visitor Card Spending		Accommodation Occupancy		Tourism-related Employment	
Domestic	International	Domestic	International	Commercial	Short-term Rental	Filled Jobs	Employment Earnings
137K	101K	4.2M\$	5.2M\$	54%	65%	670	3.5M\$
vs. Oct '24	vs. Oct '24	vs. Oct '24	vs. Oct '24	vs. Oct '24	vs. Oct '24	vs. Oct '24	vs. Oct '24
▼ -1%	▲ 36%	▼ -4%	▲ 16%	↑ 3%pt.	↑ 5%pt.	▲ 0%	▲ 3%
All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ
▼ -3%	▲ 13%	▼ -7%	▲ 13%	↑ 1%pt.	↑ 11%pt.	▲ 0%	▲ 1%

%pt. - arithmetic difference between the two percentages



Summary

Mackenzie Region - October 2025

Published: December 2025 - Mackenzie

Strong overall visitor day growth alongside international spend and guest nights

The Mackenzie Region recorded strong overall tourism growth in October, primarily fueled by the international market. Total visitor days increased +15% YoY, reflecting a marginal +1% YoY increase in domestic visitor days and a +40% YoY surge in international visitor days. Domestic card spend declined -4% YoY, while international card spend grew +16% YoY. Commercial accommodation guest nights rose +6% YoY, with domestic guest nights down -2% YoY and international guest nights up +16% YoY. Tourism-related employment remained stable (0% YoY).

Average spend per visitor drops for both domestic and international markets

The variation between the marginal domestic visitor day growth (+1%) and the domestic guest night decline of (-2%) was within a narrow margin, suggesting that the prevalence of day trip visitation remained stable. Conversely, the international visitor day surge of (+40%) when contrasted with the increase in international guest nights of (+16%) suggested a significantly higher prevalence of day trip visitation. Regarding visitor yield, the domestic sector showed that the decline in card spend (-4%) was slightly lower than visitor days (+1%), suggesting that average spend per visitor had decreased. Conversely, the international sector suggested average spend had significantly decreased, as visitor days (+40%) grew at a substantially faster rate than card spend (+16%).

Visitor days and unique arrivals surge, primarily by overseas market gains

Tourism activity in the Mackenzie Region recorded strong growth in October. The total time spent by visitors during the day increased by +15% YoY, while the number of unique individual visitors to the region rose by +17% YoY, indicating a similar trip length to the previous year. This growth was driven by the international market, seeing a +40% YoY surge in time spent alongside a +46% YoY jump in unique visitors. Domestic visitors also contributed, with a marginal +1% YoY increase in daytime presence, although their unique numbers dipped slightly by -2% YoY.

Asia-Pacific visitors surge in visitation, as some western markets decline

When analyzing where visitors came from, international growth was led by top international visitor markets from Australia (+149% YoY, 25% of total international visitor days) and visitors from China, Japan, and Korea (+65% YoY, 47% total of domestic visitor days). However, traditional western markets reported mixed results, with visitation from the USA & Canada (+99% YoY), the UK (-36% YoY), and the 'Rest of World' (-65% YoY) all recording significant declines. Domestic visitation was supported by strong growth from most major source markets. Visitors from Canterbury (+15% YoY), Otago (+10% YoY), and Southland (+94% YoY) all spent more time in the region.

Food and beverage retail spend climbed for both domestic and internationals

Card spend in the Mackenzie Region diverged in October, with domestic spend falling by -4% YoY while international spend grew by +16% YoY. When segmenting by product, domestic spend was mixed. The largest category retail food and beverage (32% of domestic spend) increased by +5% YoY, whilst food and beverage serving dropped significantly by -36% YoY, indicating further preference for self-catering. Notably, domestic accommodation spend defied the downward trend, growing by +29% YoY. International spend was driven by strong performance in the top category, retail food and beverage (31% of international spend), which surged by +46% YoY. International spend on recreation dropped to the smallest product category of significance in October (7% of international spend, +4% YoY), which matches the trend in October '24.

Domestic card spend dips but North Island markets prop up decline

Domestic card spend declined by -4% YoY in October. This result placed the region close to the West Coast (-3% YoY) and marginally behind Timaru (-1% YoY). Spend from visitors within the wider Canterbury region (52% of domestic spend) dipped slightly by -2% YoY, with Otago also contracting by -17% YoY. Conversely, spend from the Waikato grew strongly by +30% YoY, and Auckland increased by +5% YoY.

International card spend jumps led by us and asian markets

International card spend increased by +16% YoY, performing in line with neighbouring Canterbury (+16% YoY) and well ahead of similar-sized RTO region West Coast (-3% YoY). Spend from the United States grew by +38% YoY, maintaining its position as the top international market (29% of international spend). Spend from the wider Asian market showed strong markers in October. Korea surged with a +142% YoY increase, Japan (+34% YoY), 'Rest of Asia' (+22% YoY), and China (+1% YoY) all following suit. In contrast, spend from Australia declined by -6% YoY alongside the UK at -12% YoY.

Accommodation rises driven by soaring guest arrivals

Commercial accommodation in the Mackenzie Region performed positively in October, with occupancy increasing by +3%pt. YoY. This result was driven by a +6% YoY rise in total guest nights, which outpaced the +1% YoY increase in available stay units. The growth in guest nights was driven solely by a +10% YoY increase in guest arrivals, which offset a -4% YoY decline in average stay length. Growth was driven entirely by the international market (+16% YoY), as domestic guest nights declined by -2% YoY. International visitors comprised the majority of the market, accounting for 51% of total guest nights. Labour day weekend achieved 83% occupancy (peak) for short-term rental accommodation, a positive reflection of the Twizel Hard Labour race. Interestingly, the last weekend of the school holidays (3-5th October) prompted 90% occupancy (peak) for short-term rentals too.

Holiday parks lead guest nights growth as small motels decline

When segmenting by accommodation type, most categories recorded growth in total guest nights. Holiday parks and campgrounds, the largest category (63% of total guest nights), grew by +13% YoY, driven by a +13% YoY increase in guest arrivals. Large motels and apartments (20+ units) recorded growth of +8% YoY, propelled by a +28% YoY surge in international guest nights, which offset a -5% YoY decline in the domestic market. Other categories showed mixed results: lodges and boutique accommodation increased by +5% YoY, driven by a +22% YoY increase in international guest nights. Smaller motels and apartments (6-20 units) were the only category to decline, dropping by -13% YoY due to a -22% YoY fall in domestic guest nights, despite a +20% YoY rise in the international market.

Tourism employment stable despite accommodation sector decline

Tourism-related employment in the Mackenzie Region remained stable at 0% YoY in October, matching the national average (0% YoY). However, this result trailed behind similar-sized RTO regions such as the Waitaki (+5% YoY) and Fiordland (+3% YoY), while outperforming Timaru (-2% YoY). The overall stability masked a decline in the largest sector; employment in accommodation decreased by -4% YoY. This was balanced by stability in food and beverage services (0% YoY) and recreation services (0% YoY).

Visitation Overview

Mackenzie Region - October 2025

The new TV&F series provides measures of visitor activity and movement across Aotearoa New Zealand, based on presence rather than activity. In other words a visitor does not need to spend money by card, or stay in commercial accommodation to be counted. We're working with MBIE to release further measures from the series and will continue to work to update your dashboards and reports to provide the deepest possible insights from the series.



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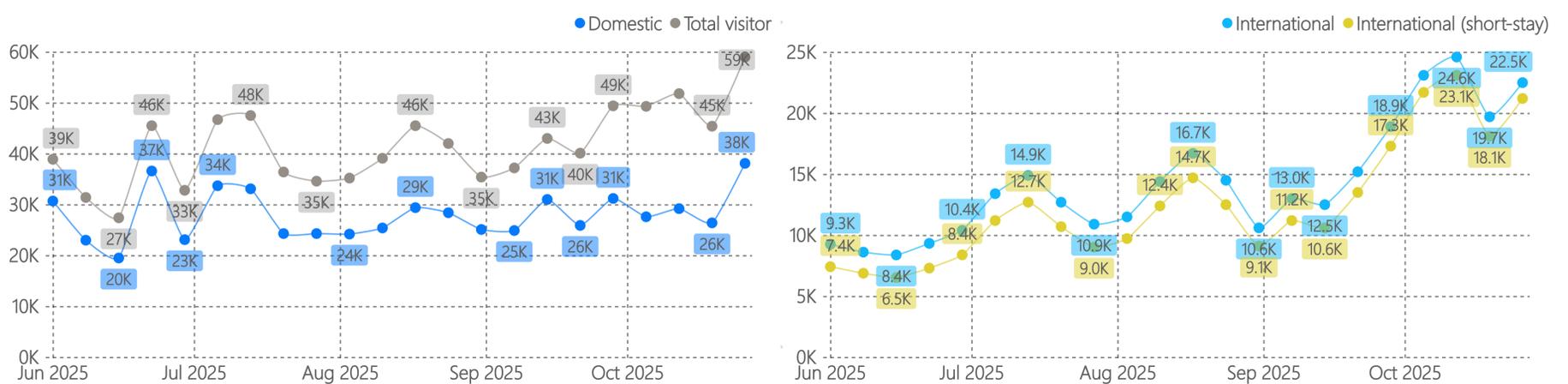


Visitation

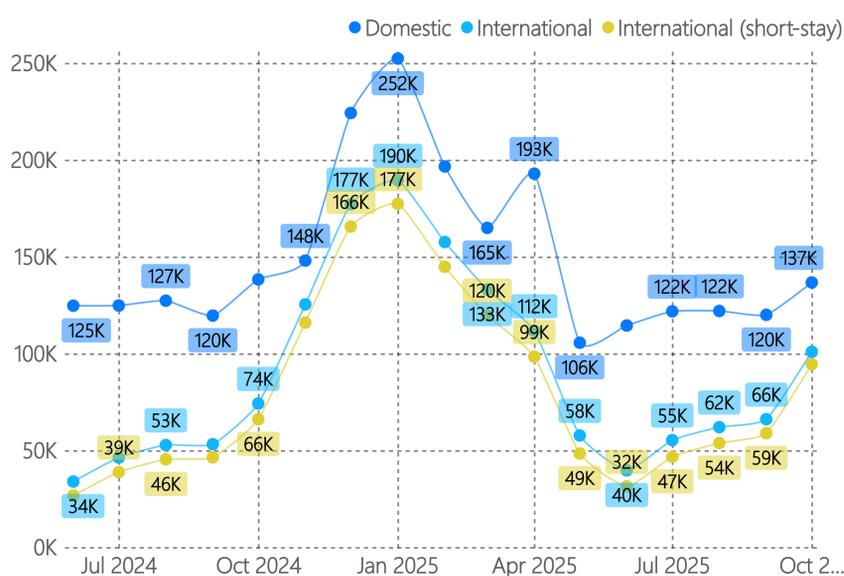


Note: Visitor days represent the cumulative sum of peak daytime visitor counts. To most accurately capture peak daily total visitor counts these are calculated separately from domestic and international, as peak times may vary between the domestic and international visitor populations."

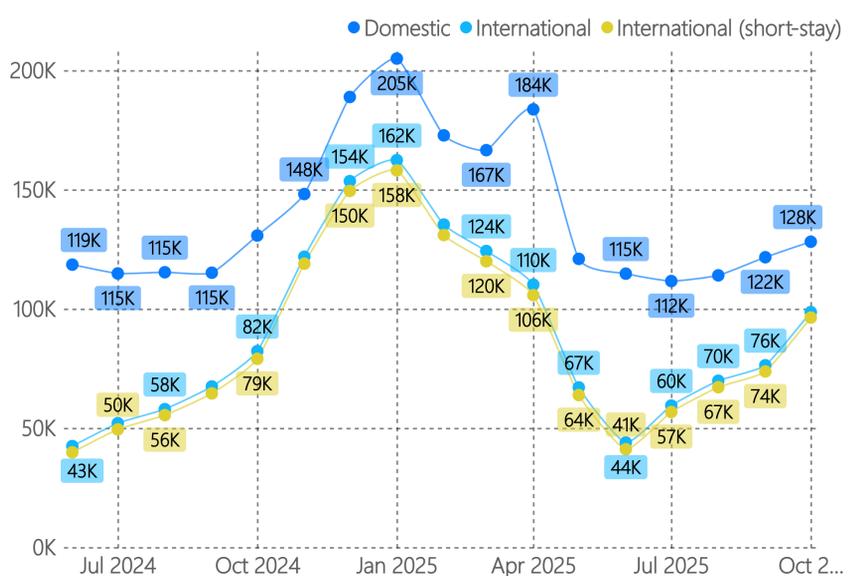
Weekly Visitor Days



Monthly Visitor Days



Monthly Unique Visitors



Visitation Overview

Mackenzie Region - October 2025

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Visitation Benchmark Comparison

Total Visitor

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	539K	25.1%	▲1%	1.1M	39.0%	▼-1%
Marlborough	206K	9.6%	▼-4%	462K	16.3%	▼-1%
Waitaki	320K	14.9%	▲3%	249K	8.8%	▲7%
Timaru	308K	14.3%	▲1%	259K	9.1%	▲1%
Mackenzie	225K	10.4%	▲7%	232K	8.2%	▲11%
Hurunui	274K	12.7%	▼-5%	95K	3.4%	▲3%
West Coast	137K	6.3%	▼-6%	223K	7.9%	▼-1%
Kaikoura	145K	6.7%	▲5%	207K	7.3%	▲17%
All NZ	3.6M		▼-3%	17.9M		▲1%

Domestic

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	420K	26.1%	▼-5%	682K	33.5%	▼-5%
Marlborough	165K	10.2%	▼-9%	385K	18.9%	▼-2%
Timaru	235K	14.6%	▼-6%	220K	10.8%	▼-2%
Waitaki	226K	14.1%	▼-3%	206K	10.1%	▲3%
Hurunui	231K	14.4%	▼-9%	68K	3.4%	▼-4%
Kaikoura	110K	6.9%	▼-2%	181K	8.9%	▲11%
Mackenzie	128K	8.0%	▼-2%	137K	6.7%	▼-1%
West Coast	93K	5.8%	▼-14%	155K	7.6%	▼-12%
All NZ	3.2M		▼-5%	12.7M		▼-3%

Total International

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	128K	22.5%	▲25%	434K	52.1%	▲5%
Mackenzie	99K	17.4%	▲20%	101K	12.1%	▲36%
Waitaki	97K	17.1%	▲21%	46K	5.5%	▲28%
Marlborough	44K	7.7%	▲21%	80K	9.6%	▲7%
West Coast	45K	8.0%	▲16%	72K	8.7%	▲39%
Timaru	75K	13.2%	▲31%	41K	4.9%	▲24%
Hurunui	45K	7.9%	▲32%	29K	3.5%	▲26%
Kaikoura	36K	6.3%	▲34%	30K	3.6%	▲67%
All NZ	437K		▲12%	5.2M		▲13%

International

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	119K	21.9%	▲29%	325K	48.8%	▲30%
Mackenzie	96K	17.7%	▲22%	95K	14.2%	▲43%
Waitaki	94K	17.3%	▲23%	37K	5.5%	▲36%
West Coast	44K	8.1%	▲17%	66K	9.9%	▲50%
Timaru	73K	13.4%	▲35%	32K	4.8%	▲37%
Marlborough	41K	7.6%	▲24%	62K	9.3%	▲17%
Hurunui	42K	7.8%	▲36%	23K	3.5%	▲34%
Kaikoura	34K	6.3%	▲38%	28K	4.2%	▲73%
All NZ	376K		▲19%	3.7M		▲33%

Domestic Visitation

Mackenzie Region - October 2025

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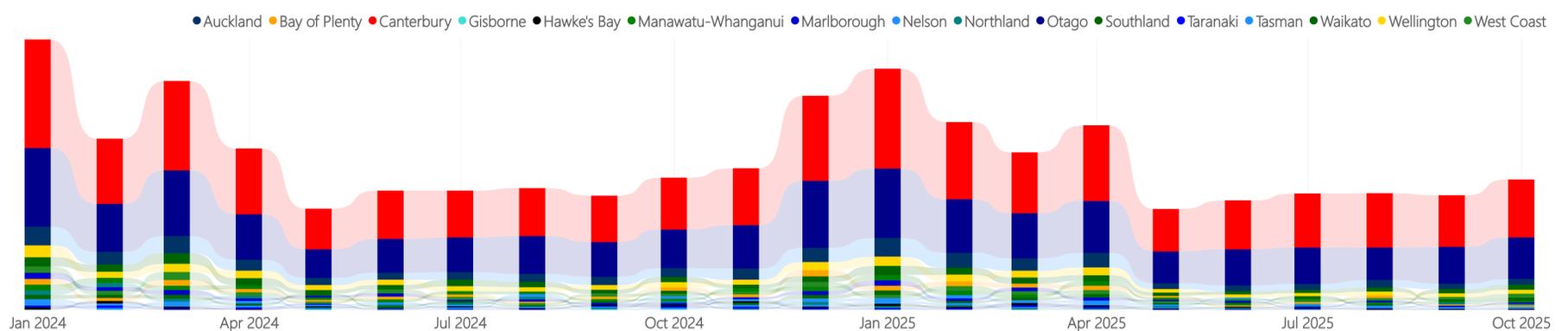


Domestic Visitation — Table by Market

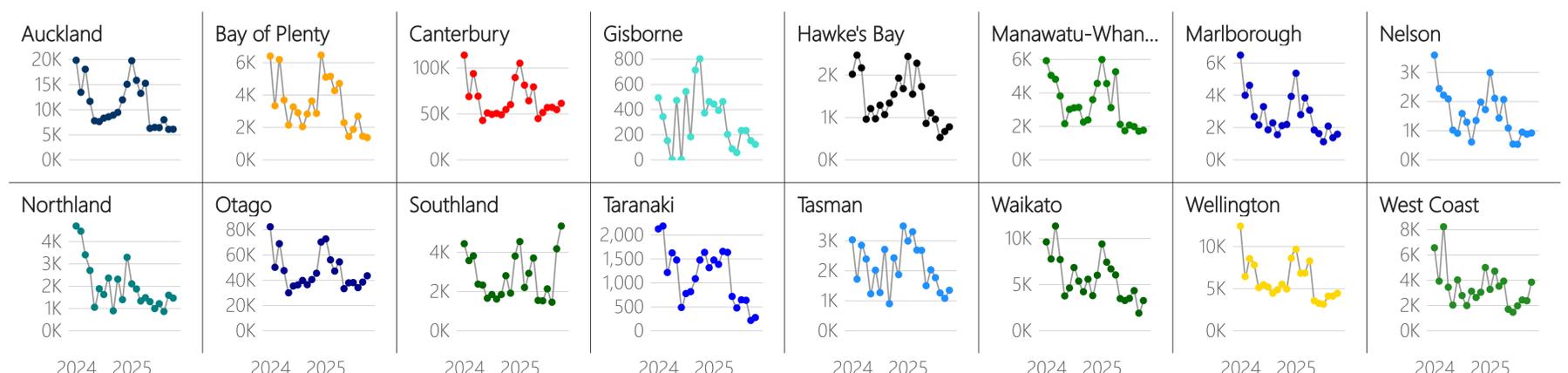
Visitor Origin by Regional Council Domestic Visitor Days Share of Domestic Visitor Days YoY Domestic Visitor Days

Regional Council	Domestic Visitor Days	Share of Domestic Visitor Days	YoY Domestic Visitor Days
Canterbury	61,100	44.7%	▲13%
Otago	43,300	31.7%	▲7%
Auckland	6,040	4.4%	▼-36%
Southland	5,320	3.9%	▲91%
Wellington	4,410	3.2%	▼-20%
West Coast	3,820	2.8%	▲46%
Waikato	3,230	2.4%	▼-42%
Manawatu-Whanganui	1,750	1.3%	▼-26%
Marlborough	1,570	1.1%	▼-25%
Northland	1,450	1.1%	▼-37%
Bay of Plenty	1,350	1.0%	▼-63%
Tasman	1,340	1.0%	▼-45%
Nelson	910	0.7%	▼-32%
Hawke's Bay	770	0.6%	▼-50%
Taranaki	270	0.2%	▼-82%
Gisborne	120	0.1%	▼-85%

Domestic Visitation — Ranked by Market



Domestic Visitation Trends — by Domestic Market



International Visitation

Mackenzie Region - October 2025

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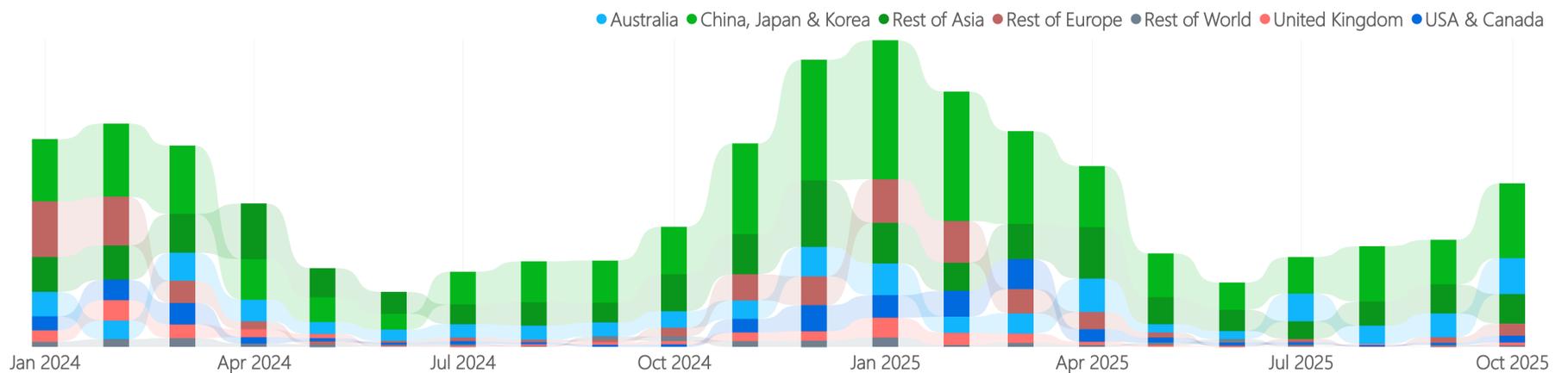
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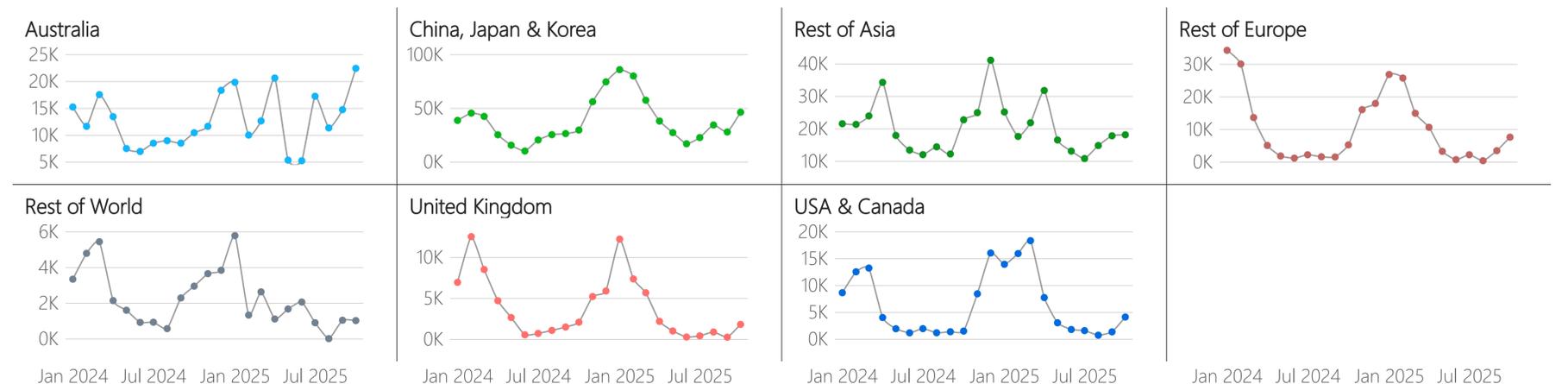
International Visitation — Table by Market

Overseas markets	International total visitor days	Share of Total International Visitor Days	YoY Total International Visitor Days
Australia	22,400	22.2%	▲115%
China, Japan & Korea	46,100	45.6%	▲56%
Rest of Asia	18,100	17.9%	▼-20%
Rest of Europe	7,570	7.5%	▲45%
Rest of World	1,010	1.0%	▼-66%
United Kingdom	1,790	1.8%	▼-13%
USA & Canada	4,070	4.0%	▲179%

International Visitation — Ranked by Market



International Visitation Trends — by International Markets



Card Spend Overview

Mackenzie Region - October 2025

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Card spend in the Mackenzie Region diverged in October, with domestic spend falling by -4% YoY while international spend grew by +16% YoY. When segmenting by product, domestic spend was mixed. The largest category retail food and beverage (32% of domestic spend) increased by +5% YoY, whilst food and beverage serving dropped significantly by -36% YoY, indicating further preference for self-catering.



Card Spend

Domestic

4.2M\$

vs. Oct '24

▼ -4%

International

5.2M\$

vs. Oct '24

▲ 16%

Year-Ending Domestic

63.5M\$

vs. Oct '24

▲ 2%

Year-Ending International

68.3M\$

vs. Oct '24

▲ 8%

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	79.0M	55.3%	▼-9%	931M	53.1%	▼-5%
Timaru	15.6M	10.9%	▼-1%	181M	10.3%	▼-4%
Marlborough	12.3M	8.6%	▼-1%	162M	9.2%	▼-1%
West Coast	10.9M	7.6%	▼-13%	151M	8.6%	▲2%
Waitaki	9.1M	6.4%	▲2%	112M	6.4%	▲2%
Hurunui	7.0M	4.9%	▼-17%	94.1M	5.4%	▲2%
Kaikoura	4.7M	3.3%	▼-4%	59.4M	3.4%	▲6%
Mackenzie	4.2M	2.9%	▼-4%	63.5M	3.6%	▲2%
All NZ	899M		▼-7%	11.1B		▼-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
Canterbury	31.8M	61.0%	▲16%	397M	57.4%	▲10%
West Coast	5.3M	10.2%	▼-3%	85.7M	12.4%	▼-4%
Mackenzie	5.2M	9.9%	▲16%	68.3M	9.9%	▲8%
Marlborough	3.3M	6.4%	▲9%	51.4M	7.4%	▲3%
Waitaki	1.9M	3.6%	▲27%	23.3M	3.4%	▲12%
Kaikoura	1.8M	3.5%	▲6%	28.4M	4.1%	▲2%
Timaru	1.8M	3.5%	▲37%	21.2M	3.1%	▲13%
Hurunui	1.0M	1.9%	▼-3%	15.9M	2.3%	▼-4%
All NZ	311M		▲13%	4.1B		▲8%

Card Spend by Product

Mackenzie Region - October 2025

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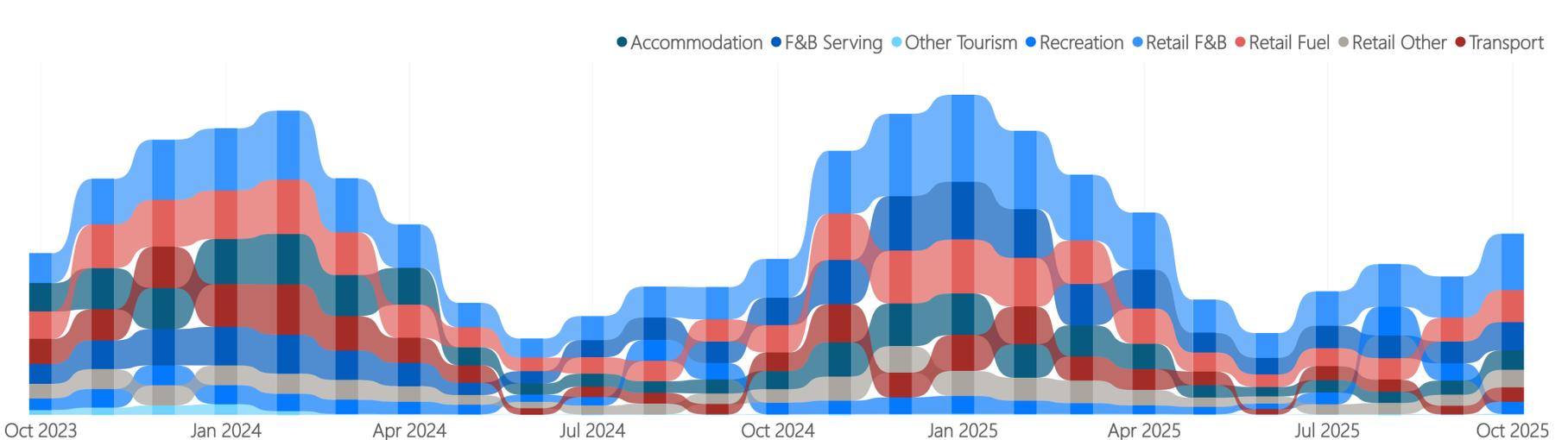
Product Overview

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	\$1,334,991	32.0%	▲5%	▲42%	\$1,602,336	31.1%	▲46%	▲235%
Retail Fuel	\$874,245	21.0%	▼-2%	▲8%	\$911,003	17.7%	▲17%	▲67%
Accommodation	\$857,722	20.6%	▲29%	▲8%	\$557,236	10.8%	▲7%	▼-58%
F&B Serving	\$561,019	13.5%	▼-36%	▼-43%	\$803,403	15.6%	▲3%	▲46%
Retail Other	\$298,895	7.2%	▼-17%	▲8%	\$498,006	9.7%	▲31%	▲142%
Recreation	\$98,365	2.4%	▲8%	▼-48%	\$344,407	6.7%	▲4%	▼-7%
Transport	\$83,190	2.0%	▼-41%	▼-4%	\$404,653	7.9%	▼-23%	▼-23%
Other Tourism	\$59,366	1.4%	▲40%	▼-73%	\$30,288	0.6%	▲65%	▼-79%

Domestic Card Spend — Ranked by Product Type



International Card Spend — Ranked by Product Type



Card Spend by Product

Mackenzie Region - October 2025

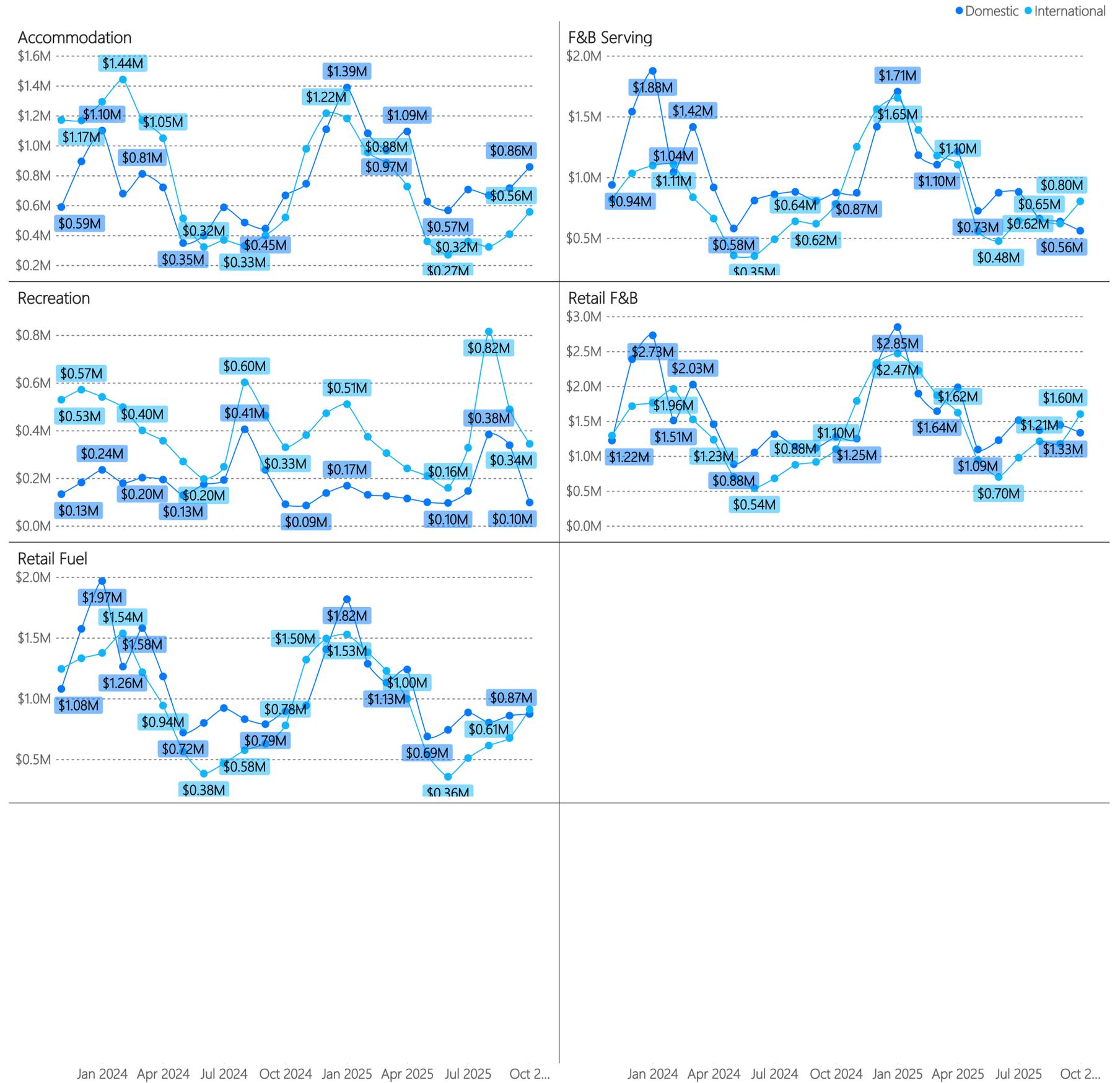
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Trends by Product



Domestic Card Spend

Mackenzie Region - October 2025

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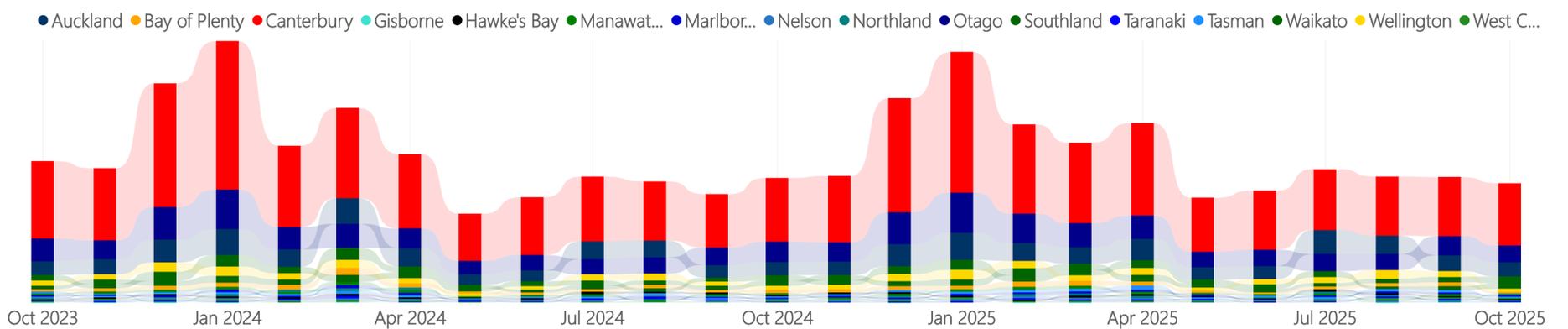
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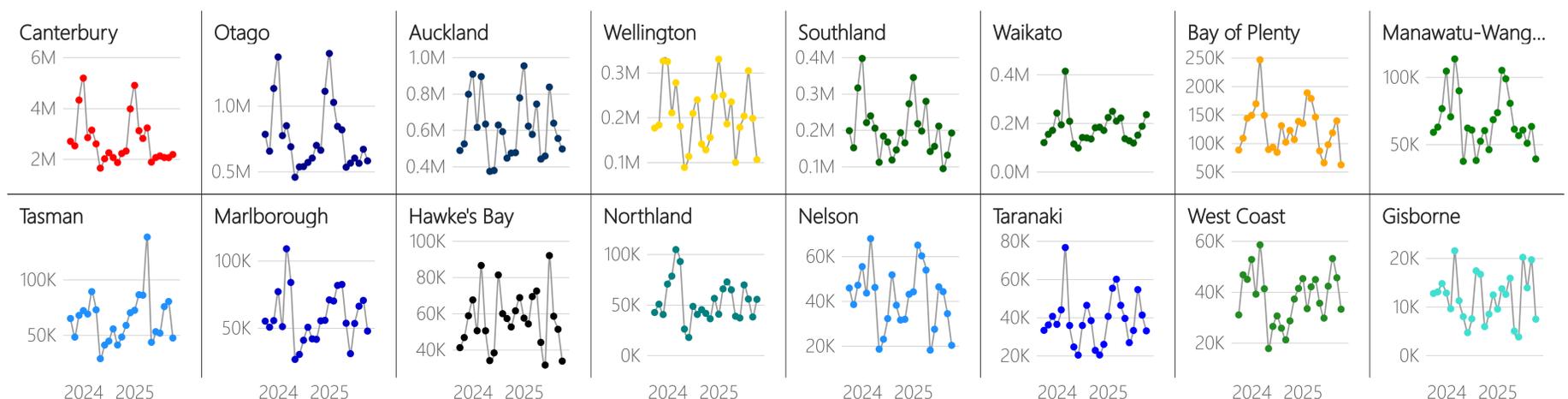
Domestic Spend — Table by Market

NZ Region	Domestic Card Spend	Share of Domestic Card Spend	YoY Domestic Card Spend	Domestic Card Spend vs. 2019
Canterbury	\$2,180,352	52.3%	▼-2%	▼-8%
Otago	\$580,409	13.9%	▼-17%	▼-9%
Auckland	\$495,775	11.9%	▲5%	▲7%
Waikato	\$234,707	5.6%	▲30%	▲76%
Southland	\$191,996	4.6%	▼0%	▲16%
Wellington	\$105,682	2.5%	▼-17%	▼-38%
Bay of Plenty	\$62,038	1.5%	▼-49%	▼-12%
Northland	\$55,323	1.3%	▲33%	▲33%
Marlborough	\$47,665	1.1%	▲15%	▲25%
Tasman	\$47,295	1.1%	▼-2%	▲32%
Manawatu-Wanganui	\$39,045	0.9%	▼-35%	▼0%
Hawke's Bay	\$33,670	0.8%	▼-36%	▼-19%
West Coast	\$33,195	0.8%	▲16%	▼-20%
Taranaki	\$32,957	0.8%	▲45%	▲71%
Nelson	\$20,235	0.5%	▼-36%	▼-38%
Gisborne	\$7,448	0.2%	▲26%	▲37%

Domestic Spend — Ranked by Market



Card Spend Trends — by Domestic Market



International Card Spend

Mackenzie Region - October 2025

Note: As of December '25, MBIE have resumed provision of the TECTs and we have updated this data contained in this report to replace the Vistr estimates that were used whilst this was unavailable. This may result in some differences in the data previously reported on between July and September '25.



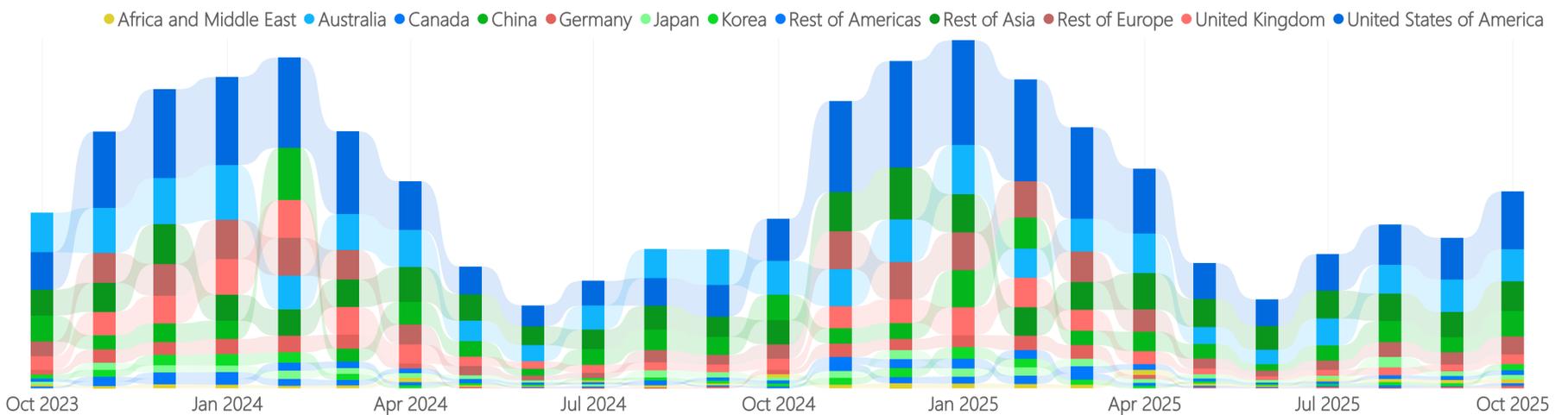
International card spend increased by +16% YoY, performing in line with neighbouring Canterbury (+16% YoY) and well ahead of similar-sized RTO region West Coast (-3% YoY). Spend from the United States grew by +38% YoY, maintaining its position as the top international market (29% of international spend).



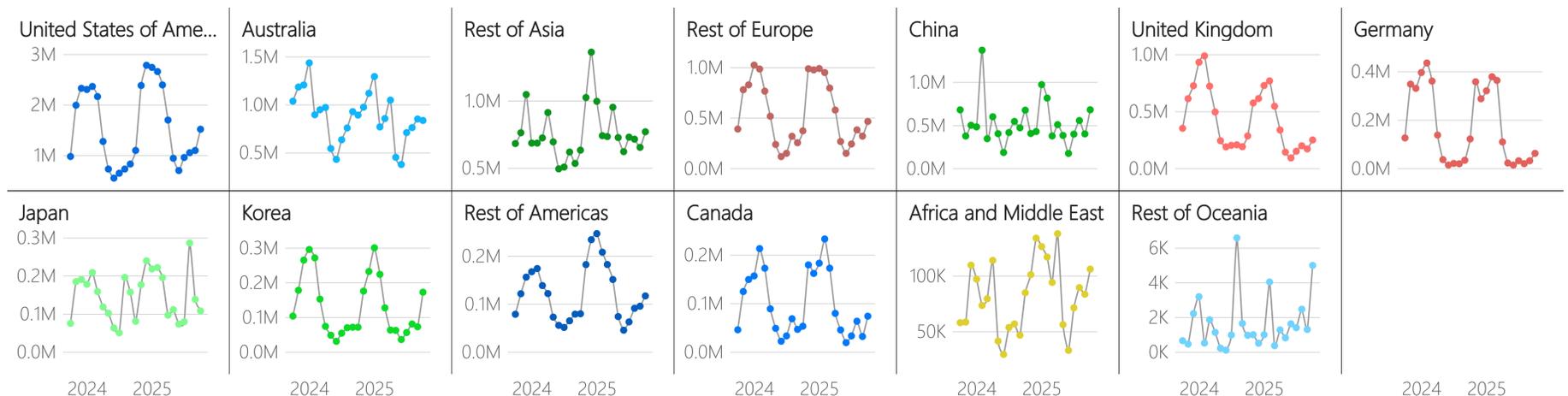
International Spend — Table by Market

Overseas Markets	International Card Spend	Share of International Card Spend	YoY International Card Spend	International Card Spend vs. 2019
United States of America	\$1,513,287	29.4%	▲38%	▲225%
Australia	\$834,116	16.2%	▼-6%	▼-32%
Rest of Asia	\$768,604	14.9%	▲22%	▲45%
China	\$679,608	13.2%	▲1%	▼-7%
Rest of Europe	\$464,073	9.0%	▲25%	▲48%
United Kingdom	\$249,073	4.8%	▼-12%	▼-27%
Korea	\$172,032	3.3%	▲142%	▲178%
Rest of Americas	\$116,593	2.3%	▲47%	▲265%
Japan	\$107,546	2.1%	▲34%	▼-46%
Africa and Middle East	\$106,033	2.1%	▲25%	▲75%
Canada	\$73,486	1.4%	▲39%	▲69%
Germany	\$61,892	1.2%	▼-49%	▼-61%
Rest of Oceania	\$4,988	0.1%	▲420%	▲>+999%

International Spend — Ranked by Market



Card Spend Trends — by International Markets



Accommodation Overview

Mackenzie Region - October 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.



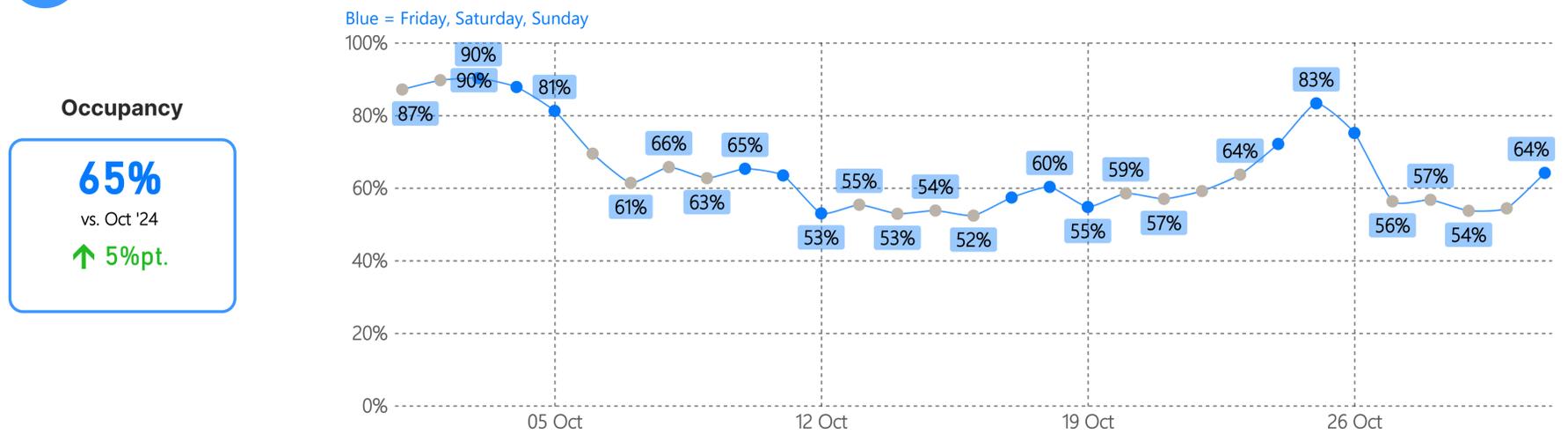
Commercial accommodation in the Mackenzie Region performed positively in October, with occupancy increasing by +3%pt. YoY. This result was driven by a +6% YoY rise in total guest nights, which outpaced the +1% YoY increase in available stay units.



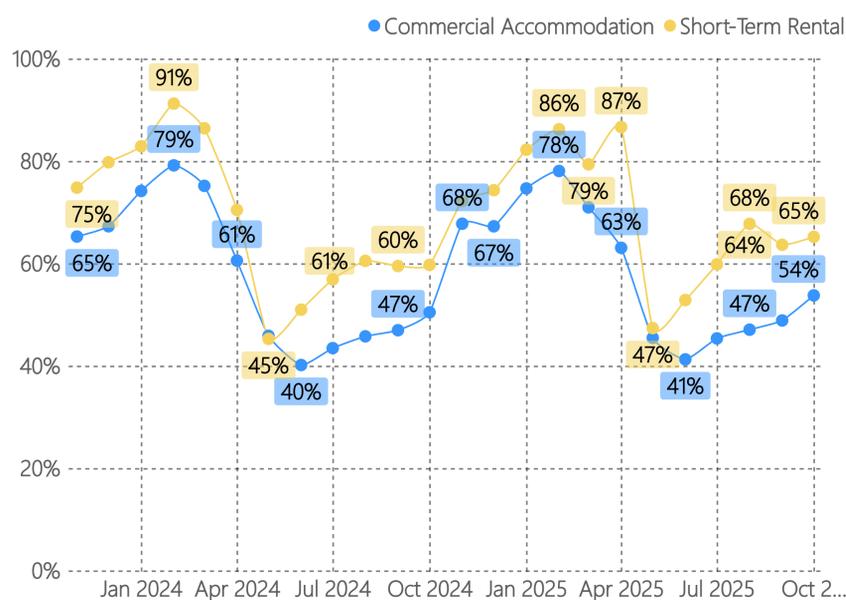
Commercial Accommodation



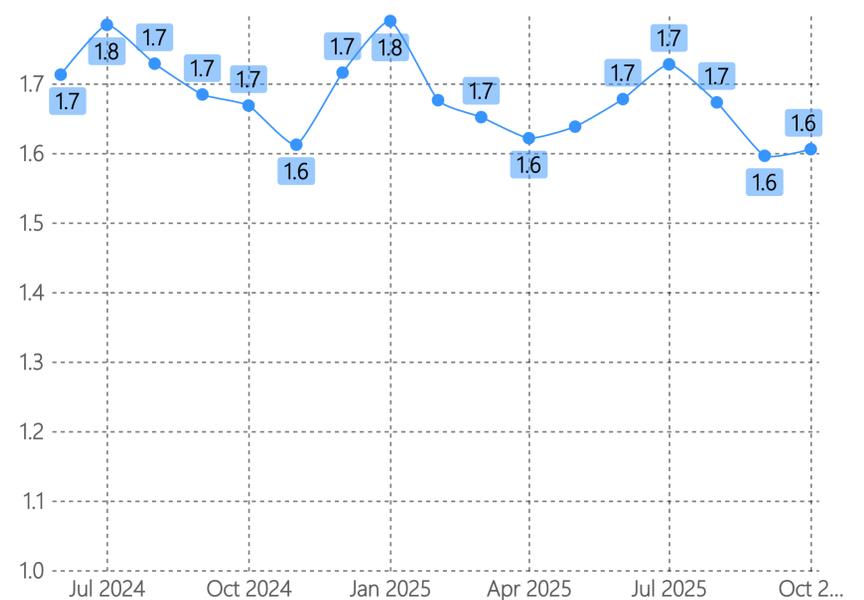
Short-term Rental Accommodation



Occupancy



Average Stay Length in Commercial Accommodation



Accommodation Overview

Mackenzie Region - October 2025

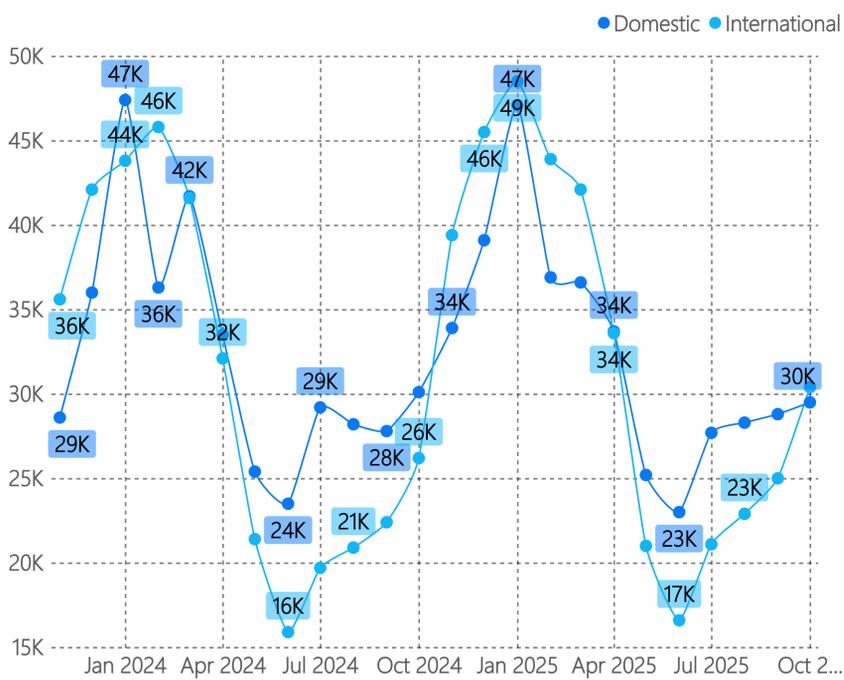
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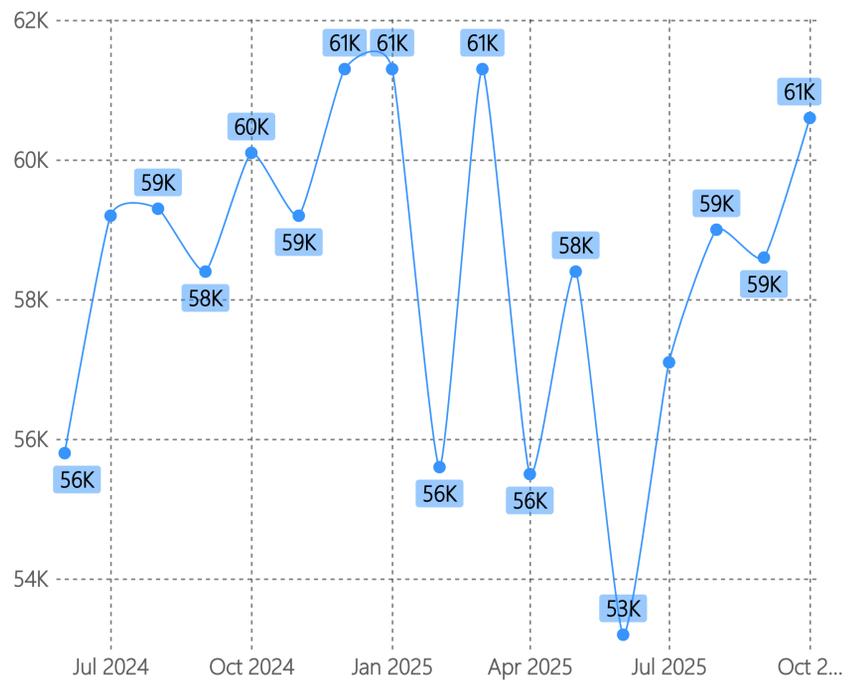
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Guest Nights in Commercial Accommodation



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	206K	50.9%	▲1%	2.4M	47.3%	▲3%
West Coast	39K	9.5%	▼-21%	595K	11.6%	▼-3%
Marlborough	35K	8.6%	▲1%	478K	9.4%	▼-2%
Mackenzie	30K	7.3%	▼-2%	390K	7.6%	▲1%
Timaru	27K	6.6%	▼-8%	302K	5.9%	▼-3%
Kaikoura	25K	6.2%	▼-8%	322K	6.3%	▲6%
Waitaki	24K	5.8%	▼-8%	318K	6.2%	▼-3%
Hurunui	21K	5.1%	▼-23%	287K	5.6%	▼-8%
All NZ	2.0M		▼-5%	25.6M		▼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
Canterbury	124K	48.5%	▲17%	1.4M	45.0%	▲7%
West Coast	47K	18.4%	▲11%	679K	21.2%	▼-2%
Mackenzie	30K	11.9%	▲16%	390K	12.2%	▲6%
Kaikoura	15K	5.9%	▲29%	200K	6.2%	▲2%
Marlborough	14K	5.5%	▲13%	186K	5.8%	▼-3%
Waitaki	14K	5.3%	▲31%	160K	5.0%	▲11%
Timaru	6K	2.4%	▲36%	75K	2.3%	▲8%
Hurunui	5K	2.1%	▲6%	70K	2.2%	▲1%
All NZ	1.1M		▲12%	13.9M		▲5%

Accommodation by Type

Mackenzie Region - October 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.



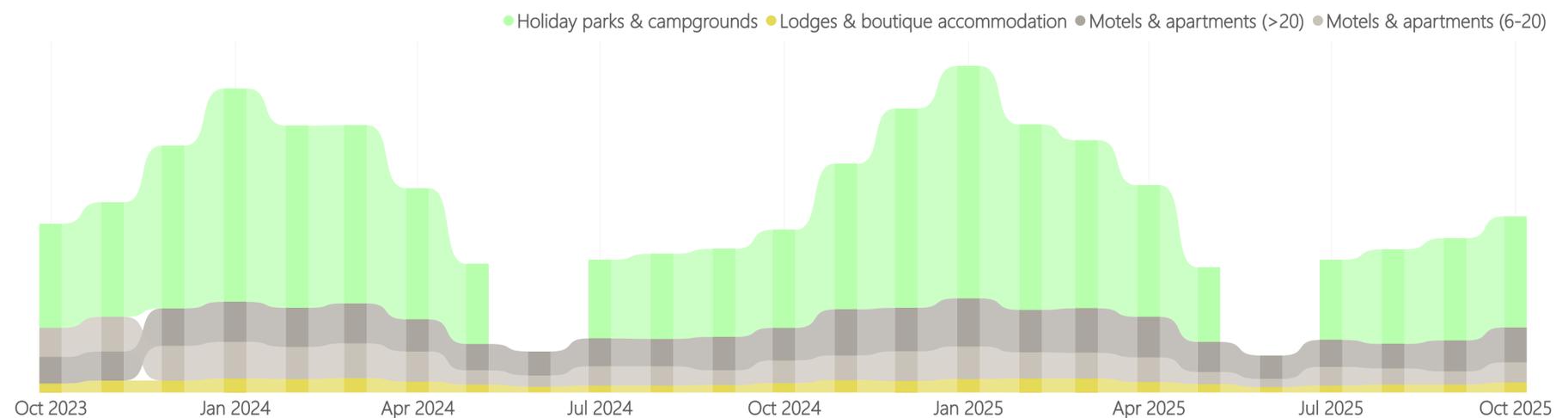
When segmenting by accommodation type, most categories recorded growth in total guest nights. Holiday parks and campgrounds, the largest category (63% of total guest nights), grew by +13% YoY, driven by a +13% YoY increase in guest arrivals. Large motels and apartments (20+ units) recorded growth of +8% YoY, propelled by a +28% YoY surge in international guest nights, which offset a -5% YoY decline in the domestic market.



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	15,500	65.7%	▲13%	22,300	63.2%	▲13%	1.4	▲0%	25,300	▼-3%	0.39	▲6%pt.
Motels & apartments (>20)	3,800	16.1%	▲15%	7,000	19.8%	▲8%	1.8	▼-6%	5,900	▲23%	0.63	▼-6%pt.
Motels & apartments (6-20)	3,200	13.6%	▲33%	4,000	11.3%	▼-13%	1.3	▼-33%	3,200	▼-6%	0.63	▼-5%pt.
Lodges & boutique accommodation	1,100	4.7%	▲0%	2,000	5.7%	▲5%	1.8	▲5%	2,300	▲10%	0.44	▼-4%pt.
Backpackers	-	-	-	-	-	-	-	-	-	-	-	-
Hotels	-	-	-	-	-	-	-	-	-	-	-	-
Total	37,300		▲10%	59,900		▲6%	1.6	▼-4%	60,600	▲1%	0.54	▲3%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	9,600	56.1%	▲3%	12,700	69.8%	▲22%	22,300	63.2%	▲13%
Motels & apartments (>20)	3,800	22.2%	▼-5%	3,200	17.6%	▲28%	7,000	19.8%	▲8%
Motels & apartments (6-20)	2,800	16.4%	▼-22%	1,200	6.6%	▲20%	4,000	11.3%	▼-13%
Lodges & boutique accommodation	900	5.3%	▼-10%	1,100	6.0%	▲22%	2,000	5.7%	▲5%
Backpackers	-	-	-	-	-	-	-	-	-
Hotels	-	-	-	-	-	-	-	-	-
Total	29,500		▼-2%	30,400		▲16%	59,900		▲6%

Accommodation by Type

Mackenzie Region - October 2025

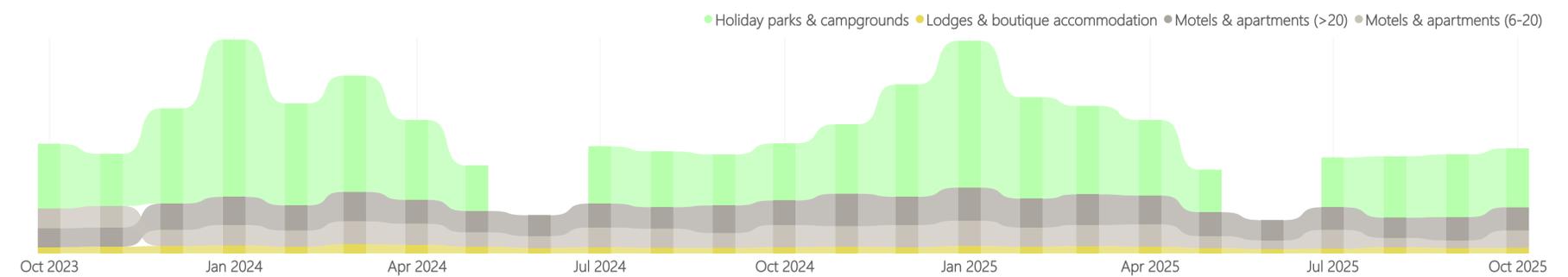
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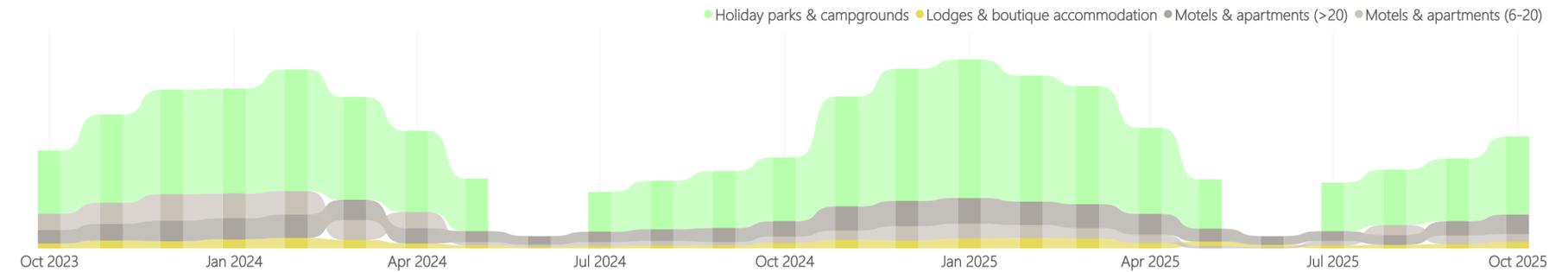
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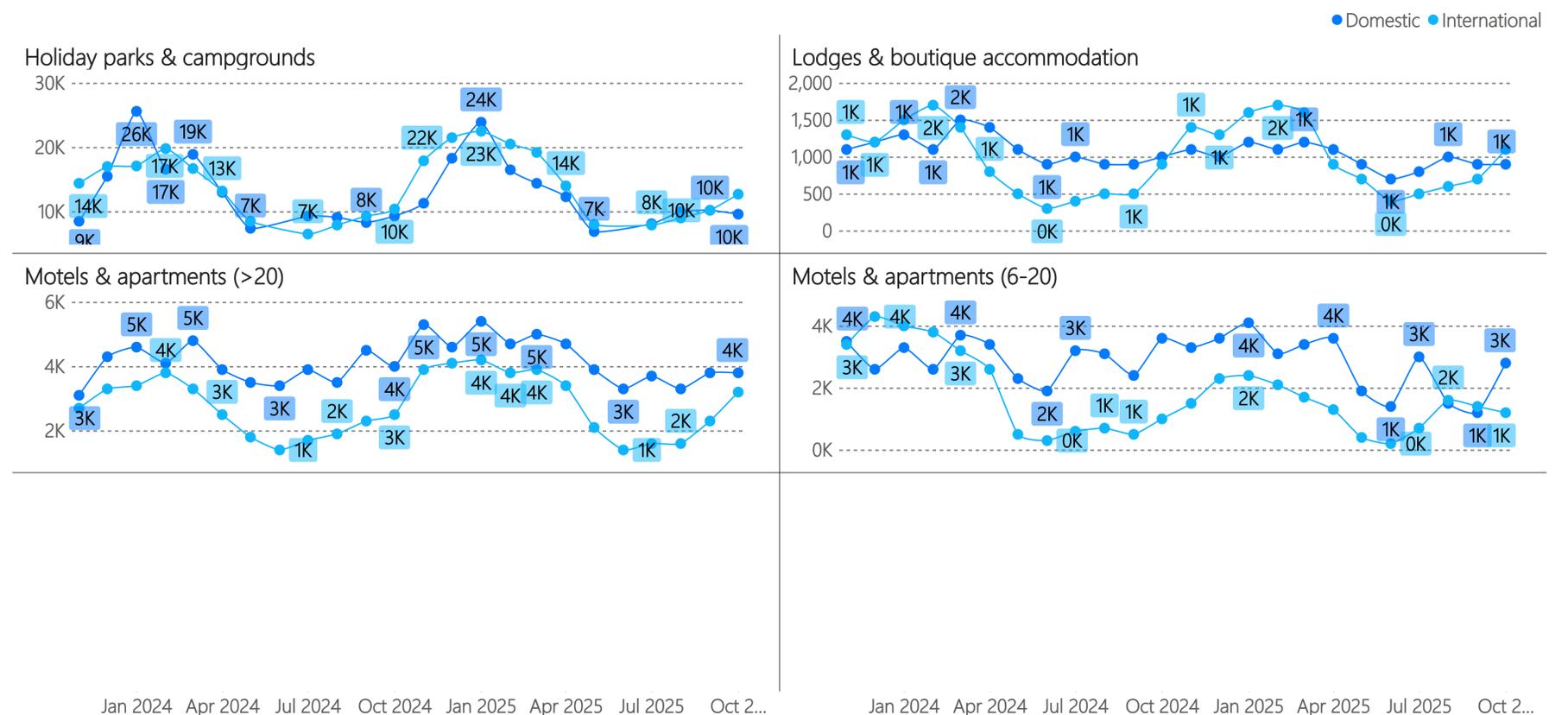
Domestic Guest Nights — Ranked by Accommodation Type



International Guest Nights — Ranked by Accommodation Type



Guest Nights — Trends by Market



Employment Overview

Mackenzie Region - October 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 in the Mackenzie Region remained stable at 0% YoY in October, matching the national average (0% YoY). However, this result trailed behind similar-sized RTO regions such as the Waitaki (+5% YoY) and Fiordland (+3% YoY), while outperforming Timaru (-2% 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	670		▲0%	\$3.487M		▲3%
Accommodation	270	40.3%	▼-4%	\$1.523M	43.7%	▼-1%
Food and Beverage Services	210	31.3%	▲0%	\$0.945M	27.1%	▲5%
Activity Services	55	8.2%	-			-
Travel and Tour Services	55	8.2%	▼-15%	\$0.352M	10.1%	▼-4%
Recreation Services	40	6.0%	▲0%	\$0.166M	4.8%	▼-21%
Air Passenger Transport Services	20	3.0%	▲0%	\$0.139M	4.0%	▲28%
Confidentiality Residual	20	3.0%	▼-64%	\$0.362M	10.4%	▲40%
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	28,100	74.7%	▲1%		74.3%	▲2%
Marlborough	2,970	7.9%	▼-1%		8.0%	▲1%
West Coast	2,050	5.5%	▼-1%		5.6%	▼0%
Timaru	1,690	4.5%	▼-2%		4.6%	▼-2%
Waitaki	980	2.6%	▲5%		2.6%	▲3%
Hurunui	800	2.1%	▼-1%		2.1%	▼-1%
Mackenzie	670	1.8%	▲0%		1.8%	▼-1%
Kaikoura	340	0.9%	▲0%		1.0%	▲1%
All NZ	486,835		▲0%			▲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	\$135M	77.5%	▼-2%	\$1.6B	77.3%	▲5%
Marlborough	\$11.9M	6.9%	▼-18%	\$145M	7.1%	▼-4%
West Coast	\$8.8M	5.1%	▼-2%	\$103M	5.1%	▲2%
Timaru	\$6.3M	3.6%	▼-1%	\$74.5M	3.7%	▲4%
Waitaki	\$3.5M	2.0%	▼0%	\$40.2M	2.0%	▲4%
Mackenzie	\$3.5M	2.0%	▲3%	\$39.8M	2.0%	▲4%
Hurunui	\$3.5M	2.0%	▼-6%	\$42.1M	2.1%	▲4%
Kaikoura	\$1.6M	0.9%	▼-5%	\$19.1M	0.9%	▲6%
All NZ	\$2.3B		▲1%	\$26.7B		▲4%

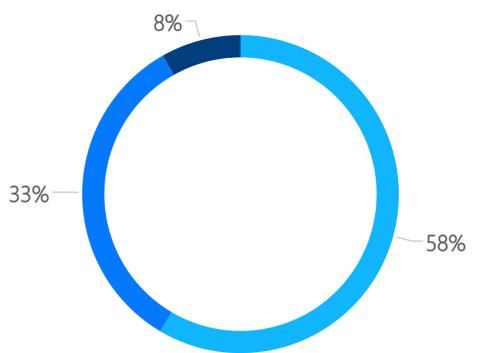
Visitor Arrivals

New Zealand - October 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.

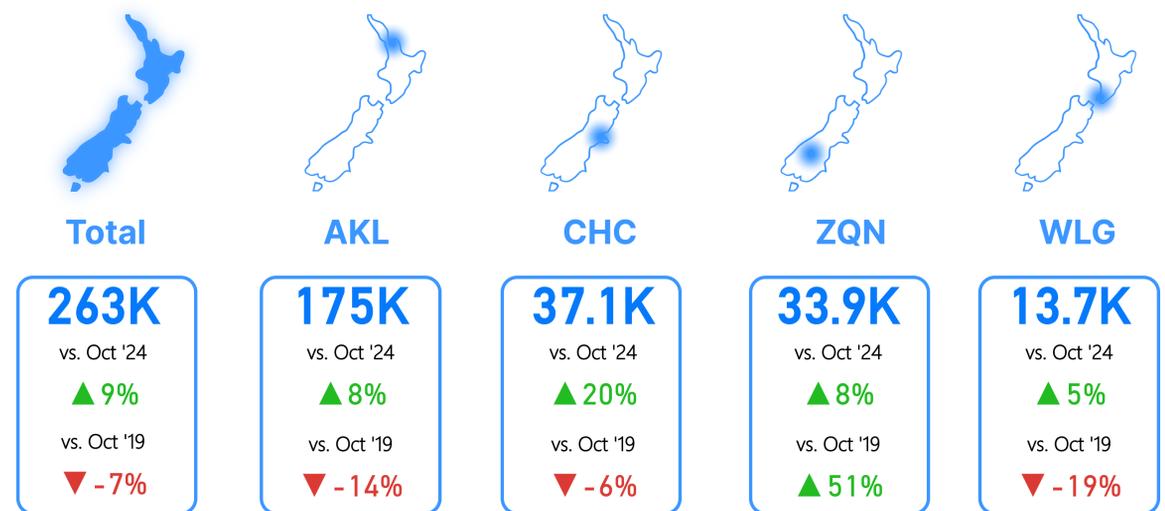
Month at a Glance

Arrivals by Travel Purpose

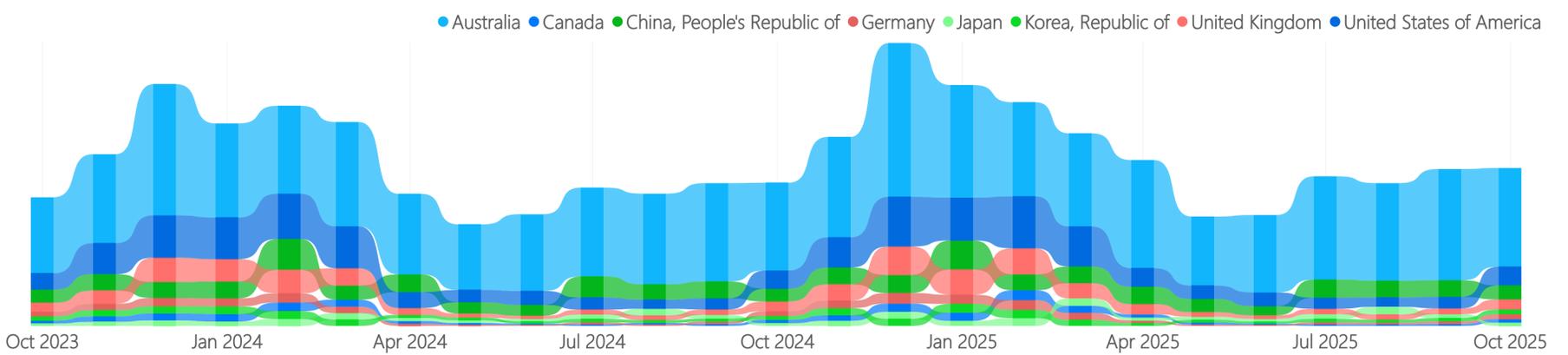


● Holiday/vacation ● Visit Friends/Relatives ● Business

International Visitor Arrivals by Port



Visitor Arrivals by International Market



Vacation Traveller Arrivals by International Market

