Monthly Destination Performance Report

Mackenzie Region - September 2025

Mackenzie Region

Visitor Card Spending

Domestic	International
4.3M$	4.6M$
vs. Sep '24	vs. Sep '24
▲ 13%	▲ 26%
All NZ	All NZ
▲ 6%	▲ 8%

Note: Vistr proprietary spend modelling estimates*

Accommodation Occupancy

Commercial	Short-term Rental
49%	64%
vs. Sep '24	vs. Sep '24
↑ 2%pt.	↑ 4%pt.
All NZ	All NZ
↑ 2%pt.	↑ 12%pt.

%pt. - arithmetic difference between the two percentages

Tourism-related Employment

Filled Jobs	Employment Earnings
670	3.2M$
vs. Sep '24	vs. Sep '24
▲ 0%	▲ 11%
All NZ	All NZ
▲ 1%	▲ 8%

Summary

International visitors drive growth for the Mackenzie Region in September
The Mackenzie Region reported strong growth overall in September card spend, with the international market outpacing the domestic market. Commercial accommodation guest nights increased +7% YoY, with domestic guest nights rising +4% YoY and international guest nights growing +12% YoY. Tourism-related employment remained unchanged (0% YoY).

Visitor spending more suggests higher average spend or more day trips
The variation between the increase in total domestic card spend (strong growth) and the domestic guest night increase of (+4% YoY) suggested that either relative average spend had likely increased, or there was a higher prevalence of day trip visitation. Similarly, the international card spend increase (significant growth) when contrasted with the increase in international guest nights of (+12% YoY) suggested the same; a substantial increase in average spend, or a higher prevalence of day trip visitation.

International visitors drive strong card spending growth especially in accommodation
The Mackenzie Region reported strong growth overall in September card spend, with the international market outpacing the domestic market. When segmenting card spend by product, accommodation spend grew significantly for the domestic market and more than doubled for the international market, following a similar pattern to the domestic/international guest nights. While accommodation was the lowest international market share category in September 2024, it became firmly situated in the third position.

Domestic card spend growth outpaces similar South Island regions
Domestic card spend growth was ahead of similar-sized South Island RTO regions such as Central Otago, Kaikōura, and Clutha, where, interestingly, Central Otago declined.

International card spend booms, nearing domestic tourism levels
International card spend also outpaced similar-sized South Island RTO regions such as Dunedin and the West Coast, and grew at a rate significantly higher than the national average. In terms of absolute figures, international card spend approached domestic card spend, similar to the trend in September 2024.

Commercial accommodation growth driven primarily by guest arrivals
Commercial accommodation was generally positive for the Mackenzie Region in September, with occupancy up +2%pt. YoY and guest nights increasing by +7% YoY. While average stay length declined by -5% YoY, guest arrivals (+13% YoY) propelled guest nights and, in turn, occupancy (as there was no change in available stay units: 0% YoY). Guest nights within the Mackenzie Region grew for both domestic (+4% YoY) and international (+12% YoY) markets, drawing near Wānaka (+2% YoY) as the fourth-largest South Island market in September guest nights (Mackenzie: 5.4%, Wānaka: 5.7% of South Island guest nights).

Holiday parks and boutique stays lead the way in September
When segmenting by accommodation type, while motels performed poorly in guest nights for September (large, 20+ units: -10% YoY; smaller, 6-20 units: -10% YoY), holiday parks and campgrounds (+16% YoY) and lodges and boutique accommodation (+14% YoY) thrived. Any category growth this month was solely due to an increase in guest arrivals (holiday parks and campgrounds: +18% YoY, smaller motels and apartments: +43% YoY, lodges and boutique accommodation: +13% YoY), as the average stay length declined for all accommodation types.

Tourism jobs flat despite regional growth
Tourism-related employment remained unchanged (0% YoY) for the month of September, slightly behind the national average (+1% YoY), and more so when comparing against neighbouring RTO regions like Central Otago (+9% YoY) and Waitaki (+2% YoY). There was mixed performance in significant employment in tourism-related industries, with accommodation dipping by -4% YoY, while food and beverage services increased by +5%. The remaining growth from food and beverage was offset by declines in all other tourism-related industries.

Published: November 2025 - Mackenzie

Report produced by: vistr Destination Intelligence

---

* 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 Overview

Mackenzie Region - September 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.

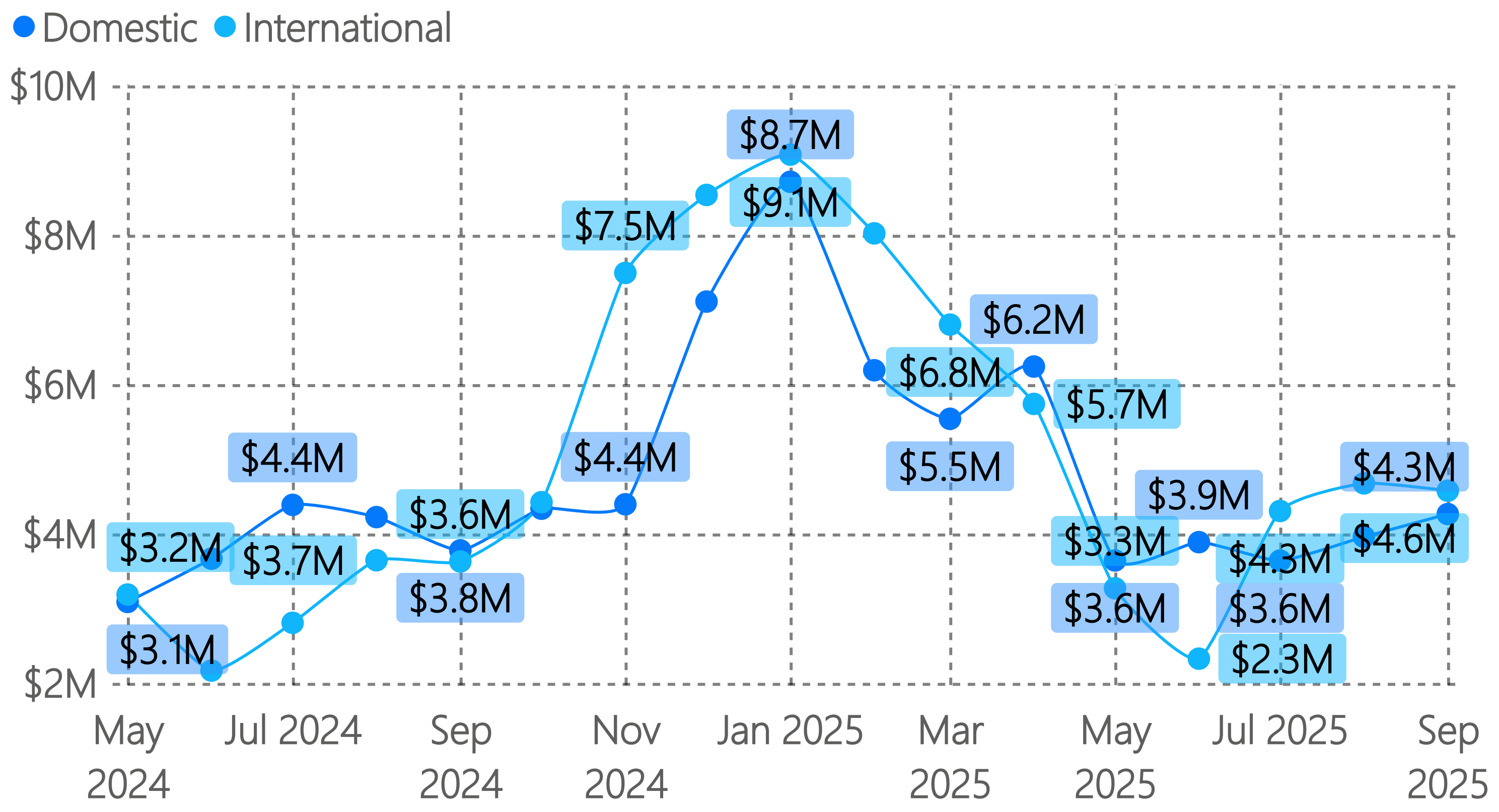
> The Mackenzie Region reported strong growth overall in September card spend, with the international market outpacing the domestic market. When segmenting card spend by product, accommodation spend grew significantly for the domestic market and more than doubled for the international market, following a similar pattern to the domestic/international guest nights.

Card Spend

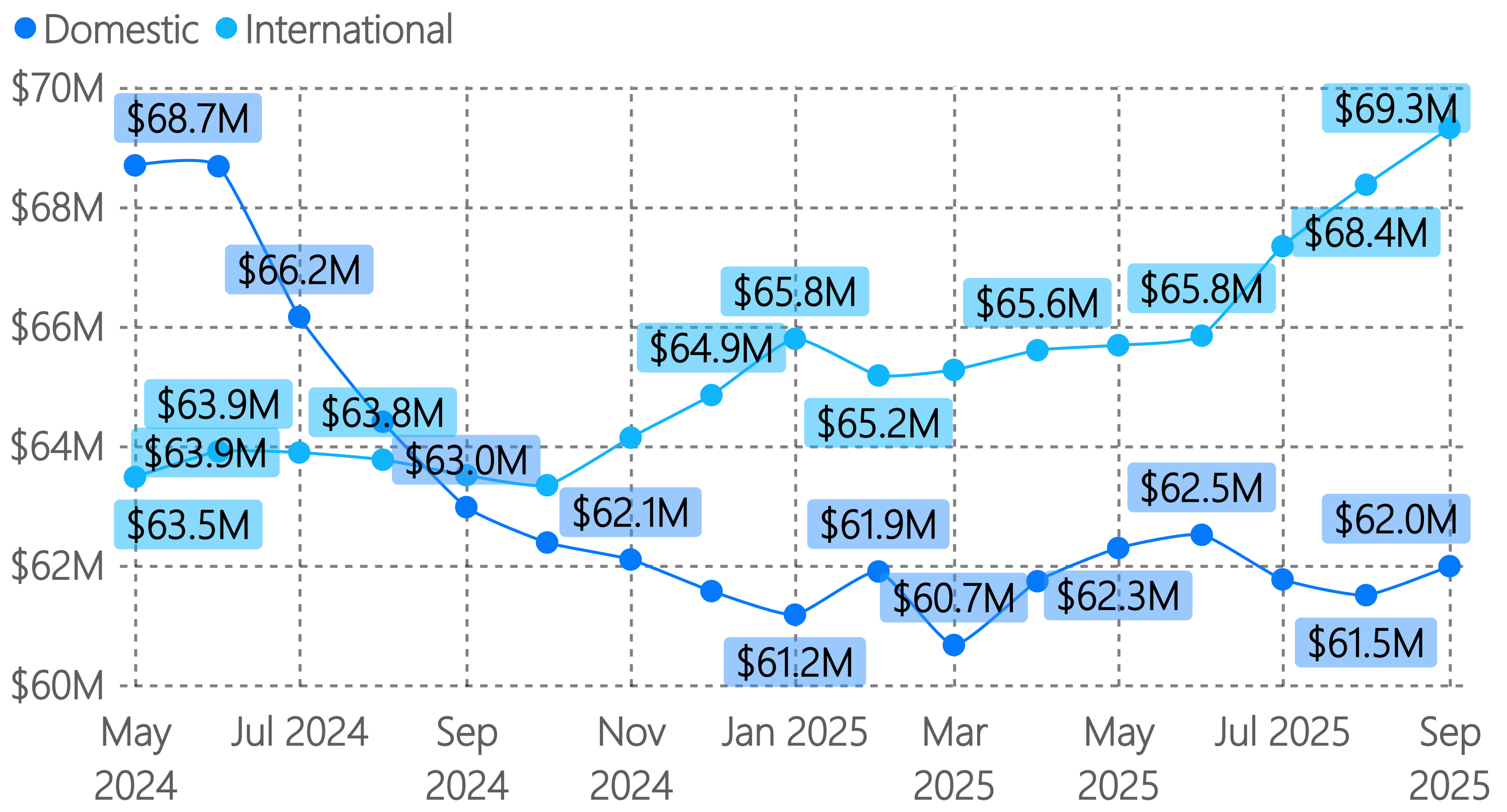
Domestic	International	Year-Ending Domestic	Year-Ending International
4.3M$	4.6M$	62.0M$	69.3M$
vs. Sep '24	vs. Sep '24	vs. Sep '24	vs. Sep '24
▲13%	▲26%	▼-2%	▲9%

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	82.2M	62.5%	▲5%	1.1B	60.0%	▲14%
Timaru	15.1M	11.5%	▲8%	211M	11.3%	▲12%
West Coast	10.0M	7.6%	▲7%	168M	9.0%	▲14%
Waitaki	8.5M	6.5%	▲8%	125M	6.7%	▲13%
Hurunui	7.1M	5.4%	▲13%	107M	5.7%	▲17%
Kaikoura	4.3M	3.3%	▲9%	65.3M	3.5%	▲17%
Mackenzie	4.3M	3.2%	▲13%	69.6M	3.7%	▲11%
All NZ	856M		▲6%	12.5B		▲14%

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	23.4M	63.7%	▲3%	426M	61.4%	▲19%
Mackenzie	4.6M	12.5%	▲26%	78.3M	11.3%	▲23%
West Coast	3.8M	10.4%	▲16%	92.4M	13.3%	▲3%
Kaikoura	1.5M	4.2%	▲66%	30.6M	4.4%	▲11%
Waitaki	1.2M	3.4%	▲13%	25.4M	3.7%	▲22%
Timaru	1.2M	3.3%	▲17%	22.5M	3.2%	▲20%
Hurunui	937K	2.6%	▲26%	18.1M	2.6%	▲10%
All NZ	249M		▲8%	4.5B		▲21%

Card Spend by Product

Mackenzie Region - September 2025

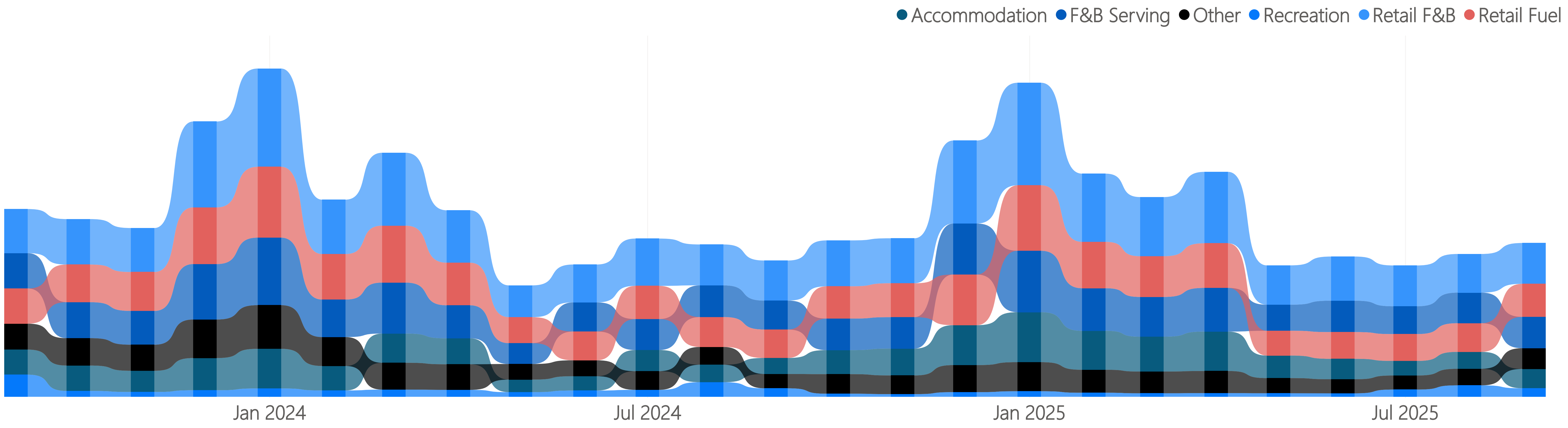
Note: Due to a pause in MBIE's TECT data publication, monthly figures from July '25 onward are estimates derived from our proprietary forecasting model; noting that modelling continues to reflect electronic card spending only. This data estimates spending made via electronic cards, broken down by industry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

> The Mackenzie Region reported strong growth overall in September card spend, with the international market outpacing the domestic market. When segmenting card spend by product, accommodation spend grew significantly for the domestic market and more than doubled for the international market, following a similar pattern to the domestic/international guest nights.

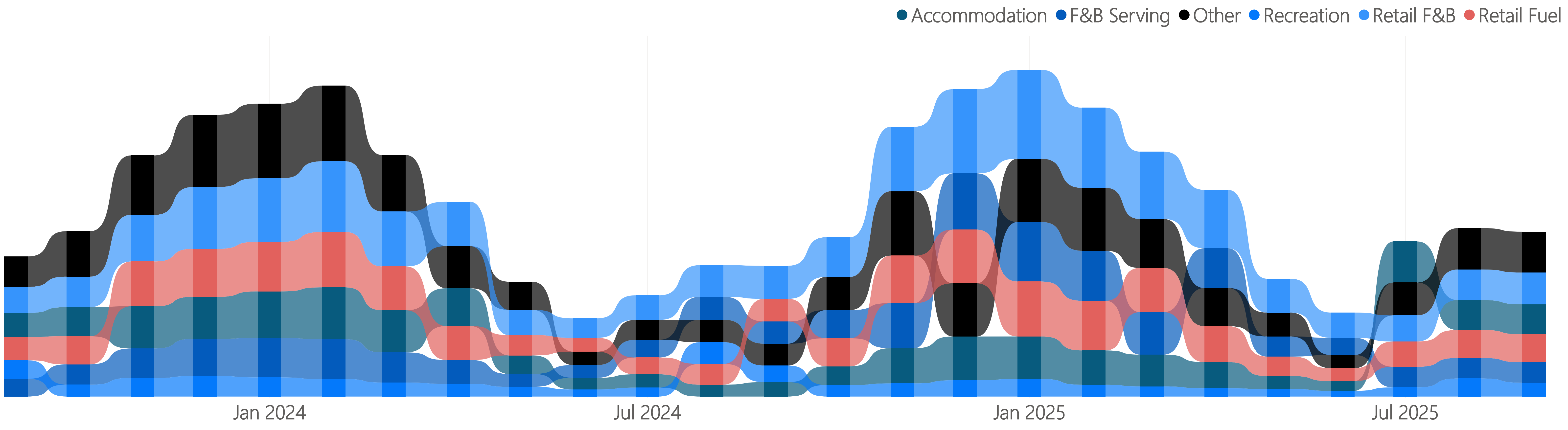
Product Overview

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	$1,134,182	26.6%	▲2%	▲58%	$881,270	19.2%	▼-4%	▲154%
Retail Fuel	$917,650	21.5%	▲16%	▲36%	$778,652	17.0%	▲24%	▲99%
F&B Serving	$869,105	20.4%	▲8%	▲8%	$569,312	12.4%	▼-8%	▲42%
Other	$576,656	13.5%	▲45%	-	$1,135,820	24.8%	▲87%	-
Accommodation	$536,378	12.6%	▲20%	▼-19%	$833,257	18.2%	▲108%	▼-7%
Recreation	$236,288	5.5%	▲0%	▼-43%	$384,658	8.4%	▼-17%	▼-20%

Domestic Card Spend — Ranked by Product Type



International Card Spend — Ranked by Product Type



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

Card Spend by Product

Mackenzie Region - September 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.

> The Mackenzie Region reported strong growth overall in September card spend, with the international market outpacing the domestic market. When segmenting card spend by product, accommodation spend grew significantly for the domestic market and more than doubled for the international market, following a similar pattern to the domestic/international guest nights.

Trends by Product

Published: November 2025 - Mackenzie

Report produced by: vistr Destination Intelligence

Accommodation Overview

Mackenzie Region - September 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 was generally positive for the Mackenzie Region in September, with occupancy up +2%pt. YoY and guest nights increasing by +7% YoY. While average stay length declined by -5% YoY, guest arrivals (+13% YoY) propelled guest nights and, in turn, occupancy (as there was no change in available stay units: 0% YoY).

Commercial Accommodation

Occupancy	Guest Nights	Available Stay Units	Average Stay Length	Guest Arrivals
49%	**53.8K**	**58.6K**	**1.6**	**33.7K**
vs. Sep '24	vs. Sep '24	vs. Sep '24	vs. Sep '24	vs. Sep '24
↑ 2%pt.	▲ 7%	▲ 0%	▼ -5%	▲ 13%

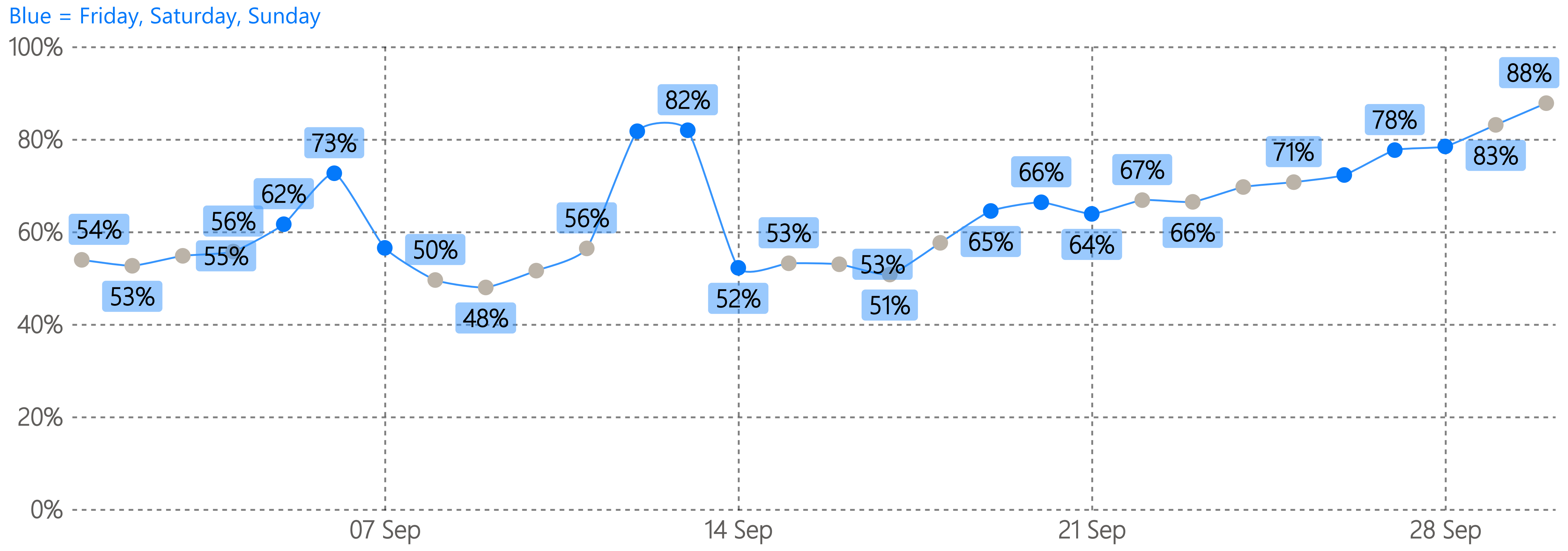
Short-term Rental Accommodation

Occupancy

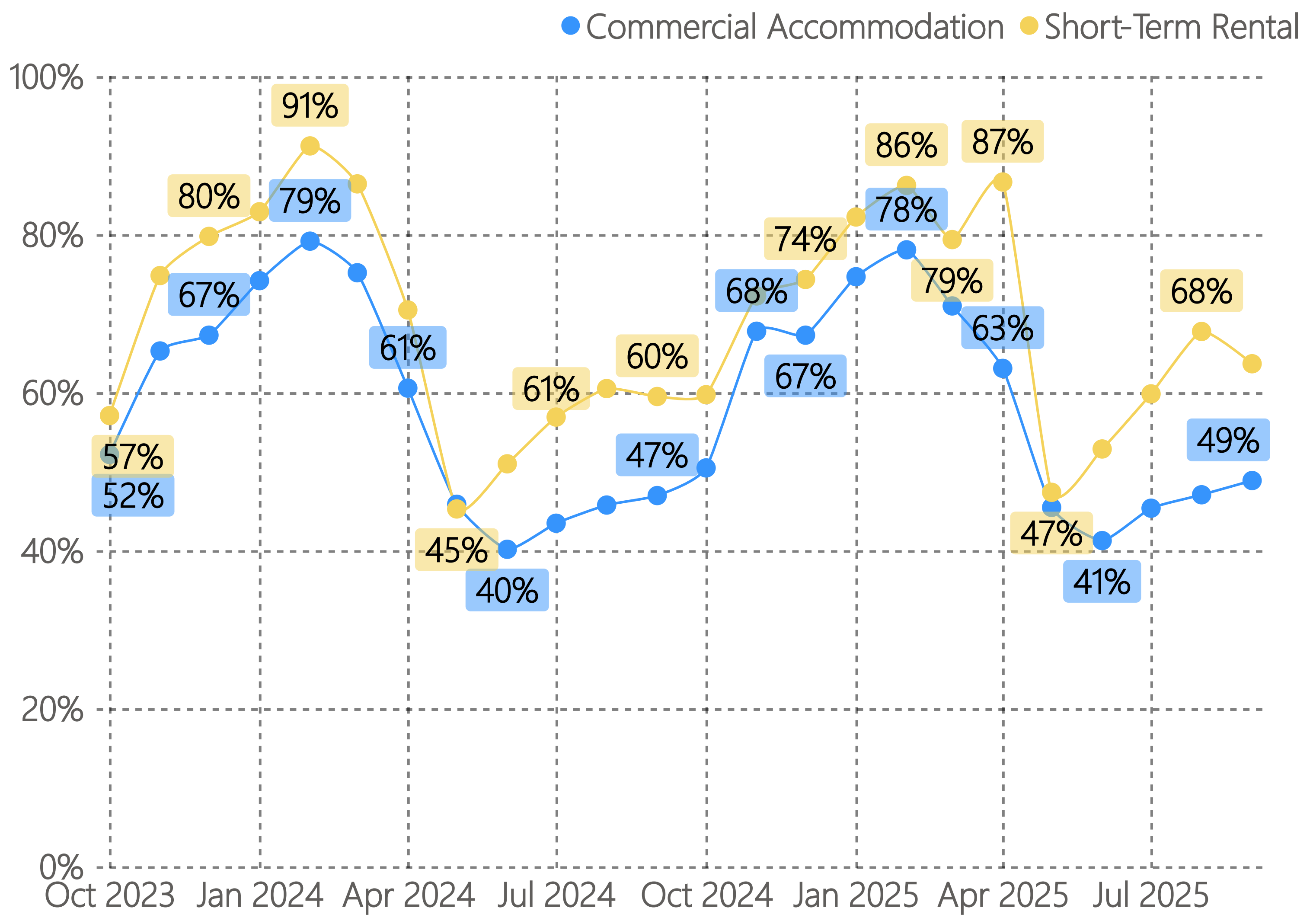
64%

vs. Sep '24

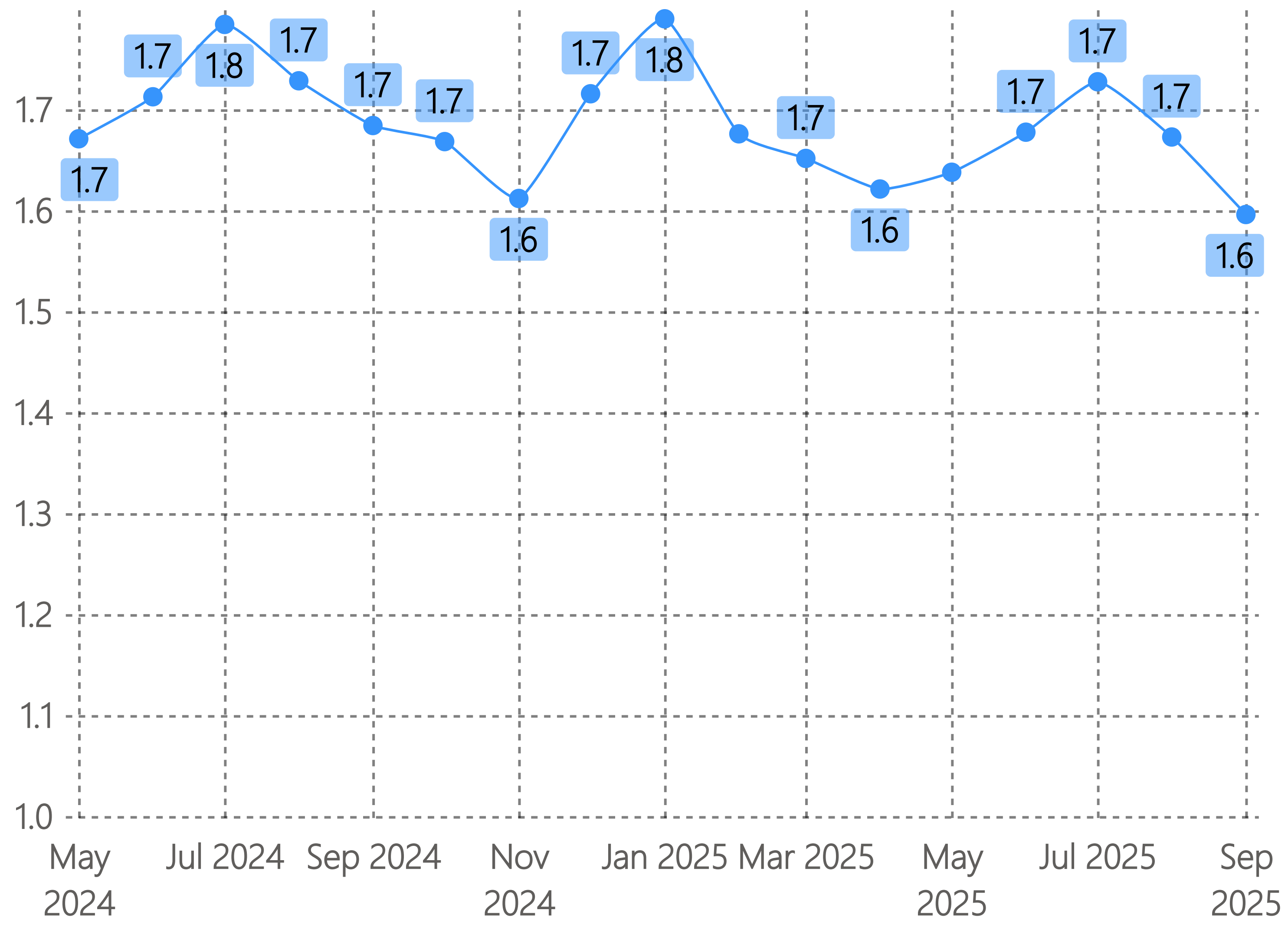
↑ 4%pt.



Occupancy



Average Stay Length in Commercial Accommodation



Published: November 2025 - Mackenzie

Report produced by: vistr Destination Intelligence

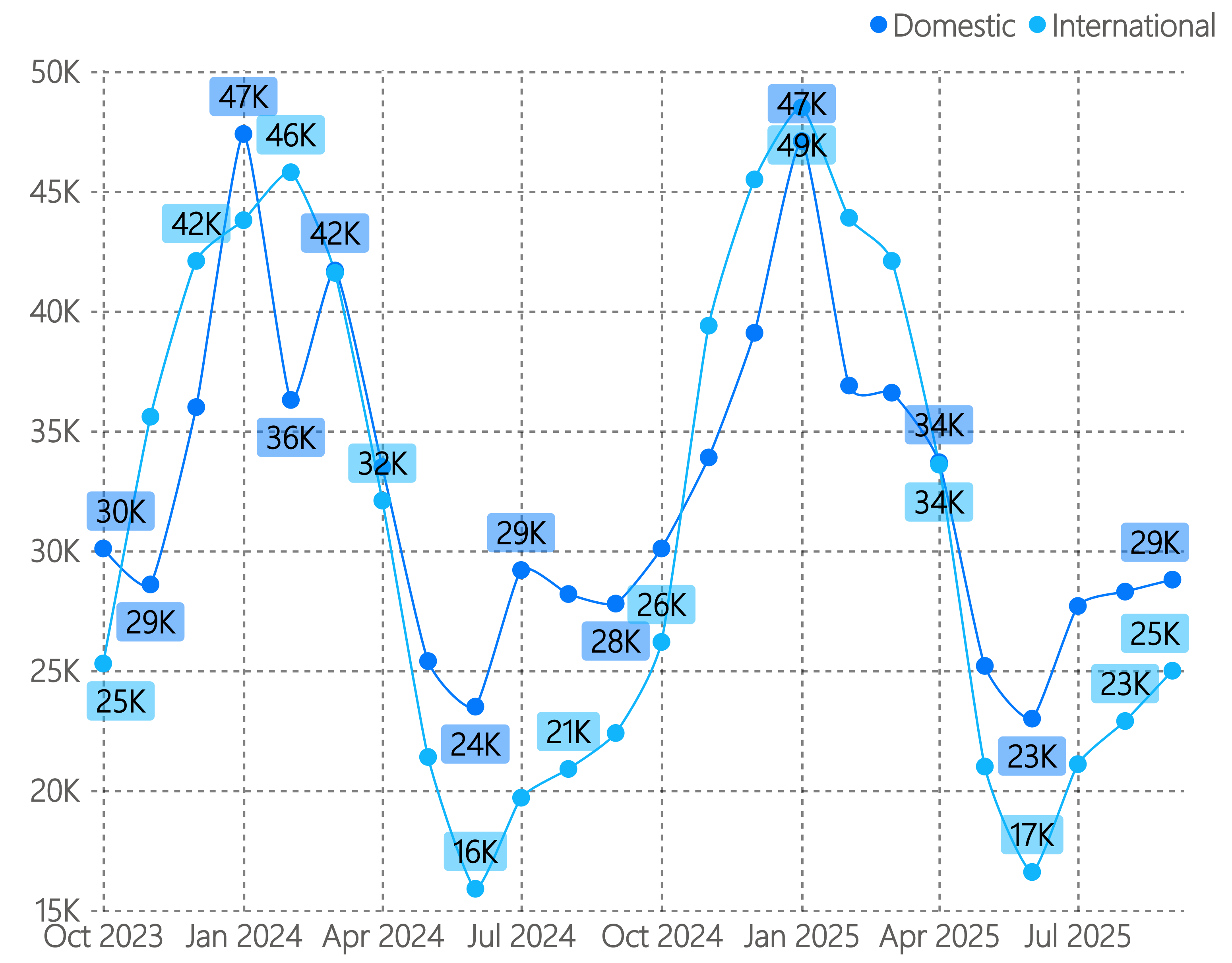
Accommodation Overview

Mackenzie Region - September 2025

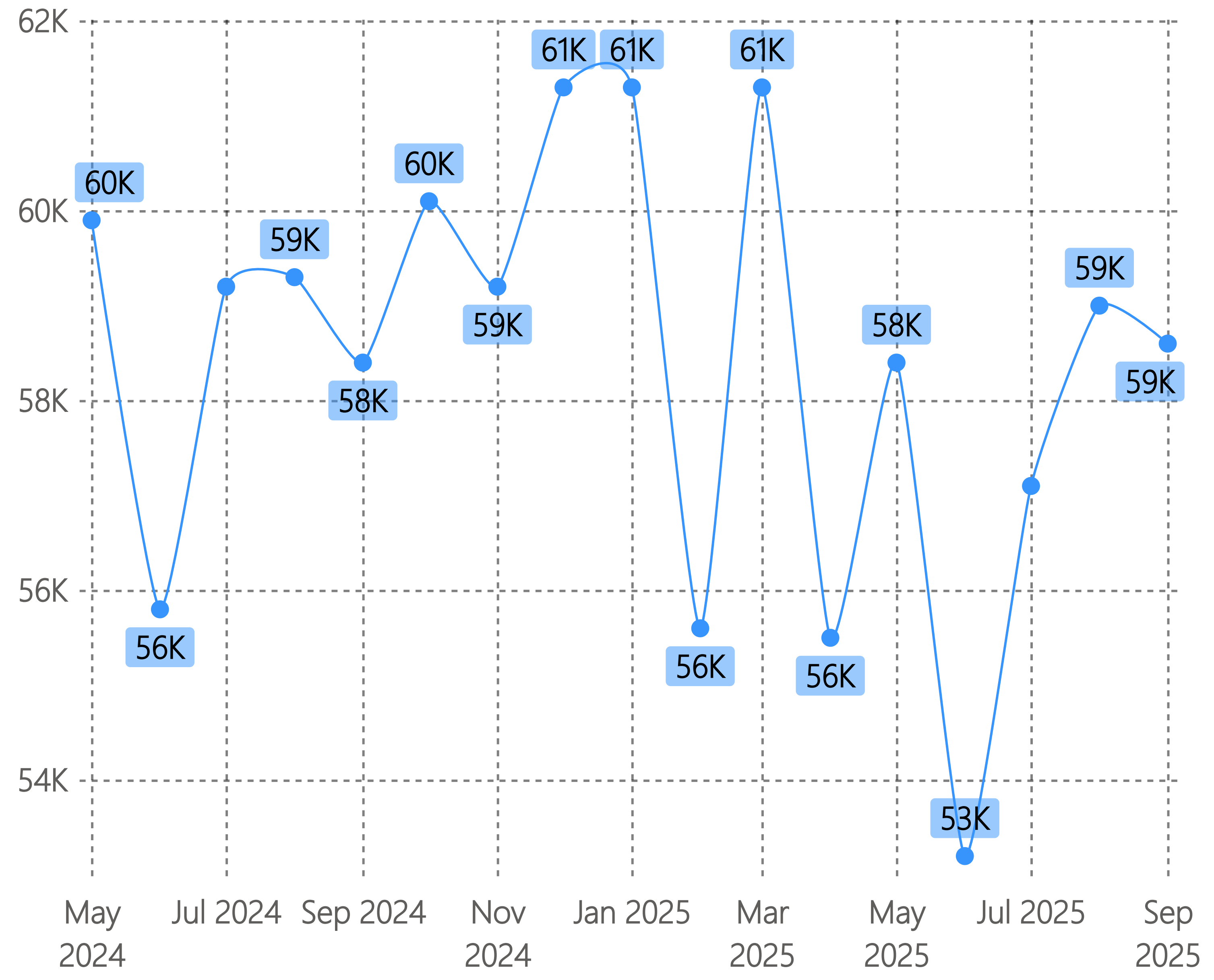
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights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

> Commercial accommodation was generally positive for the Mackenzie Region in September, with occupancy up +2%pt. YoY and guest nights increasing by +7% YoY. While average stay length declined by -5% YoY, guest arrivals (+13% YoY) propelled guest nights and, in turn, occupancy (as there was no change in available stay units: 0% YoY).

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	191K	54.8%	▲4%	2.4M	51.9%	▲3%
West Coast	38K	10.8%	▼-7%	605K	13.0%	▼-2%
Mackenzie	29K	8.3%	▲4%	390K	8.4%	▲1%
Timaru	24K	7.0%	▲6%	304K	6.5%	▼-1%
Kaikoura	24K	6.8%	▲20%	324K	7.0%	▲8%
Hurunui	22K	6.2%	▲16%	293K	6.3%	▼-6%
Waitaki	22K	6.2%	▲9%	320K	6.9%	▼-1%
All NZ	1.9M		▲5%	25.8M		▲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	102K	55.4%	▲40%	1.4M	47.8%	▲6%
West Coast	31K	16.8%	▲11%	675K	22.6%	▼-3%
Mackenzie	25K	13.6%	▲12%	386K	12.9%	▲5%
Waitaki	9K	4.9%	▲29%	157K	5.3%	▲10%
Kaikoura	9K	4.7%	▲13%	197K	6.6%	▼-1%
Timaru	5K	2.5%	▲57%	73K	2.5%	▲5%
Hurunui	4K	2.1%	▲3%	69K	2.3%	▲1%
All NZ	868K		▲12%	13.7M		▲4%

Report produced by: vistr Destination Intelligence

Accommodation by Type

Mackenzie Region - September 2025

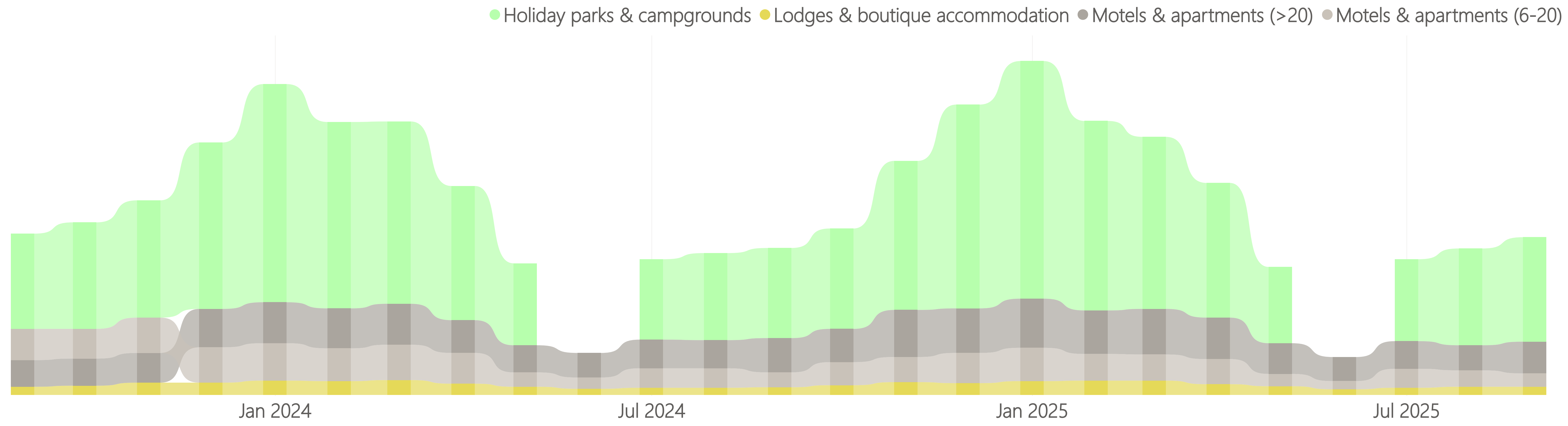
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights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

> When segmenting by accommodation type, while motels performed poorly in guest nights for September (large, 20+ units: -10% YoY; smaller, 6-20 units: -10% YoY), holiday parks and campgrounds (+16% YoY) and lodges and boutique accommodation (+14% YoY) thrived. Any category growth this month was solely due to an increase in guest arrivals (holiday parks and campgrounds: +18% YoY, smaller motels and apartments: +43% YoY, lodges and boutique accommodation: +13% YoY), as the average stay length declined for all accommodation types.

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	14,400	70.6%	▲18%	20,400	66.4%	▲16%	1.4	▼-2%	24,700	▼-3%	0.35	↑ 5%pt.
Motels & apartments (>20)	3,100	15.2%	▼-6%	6,100	19.9%	▼-10%	2.0	▼-1%	5,700	▲4%	0.57	↓ -7%pt.
Motels & apartments (6-20)	2,000	9.8%	▲43%	2,600	8.5%	▼-10%	1.3	▼-37%	3,100	▲29%	0.42	↓ -20%pt.
Lodges & boutique accommodation	900	4.4%	▲13%	1,600	5.2%	▲14%	1.8	▼-5%	2,100	▲11%	0.37	↓ -5%pt.
Backpackers			-			-		-		-		
Hotels			-			-		-		-		
Total	33,700		▲13%	53,800		▲7%	1.6	▼-5%	58,600	▲0%	0.49	↑ 2%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	10,200	63.4%	▲23%	10,200	69.9%	▲10%	20,400	66.4%	▲16%
Motels & apartments (>20)	3,800	23.6%	▼-16%	2,300	15.8%	▲0%	6,100	19.9%	▼-10%
Motels & apartments (6-20)	1,200	7.5%	▼-50%	1,400	9.6%	▲180%	2,600	8.5%	▼-10%
Lodges & boutique accommodation	900	5.6%	▲0%	700	4.8%	▲40%	1,600	5.2%	▲14%
Backpackers			-			-			-
Hotels			-			-			-
Total	28,800		▲4%	25,000		▲12%	53,800		▲7%

Report produced by: vistr Destination Intelligence

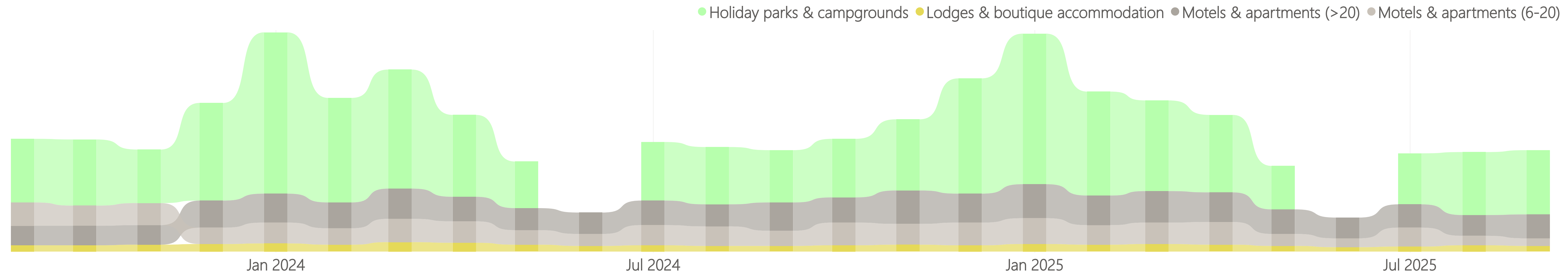
Accommodation by Type

Mackenzie Region - September 2025

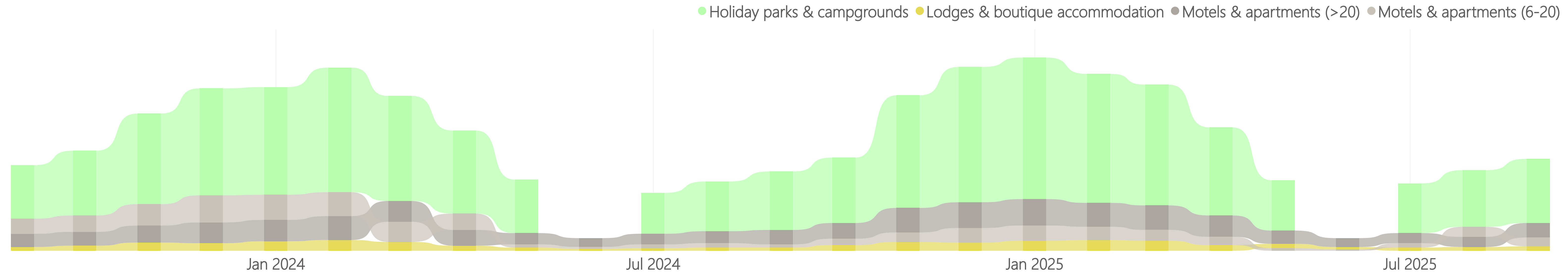
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights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

> When segmenting by accommodation type, while motels performed poorly in guest nights for September (large, 20+ units: -10% YoY; smaller, 6-20 units: -10% YoY), holiday parks and campgrounds (+16% YoY) and lodges and boutique accommodation (+14% YoY) thrived. Any category growth this month was solely due to an increase in guest arrivals (holiday parks and campgrounds: +18% YoY, smaller motels and apartments: +43% YoY, lodges and boutique accommodation: +13% YoY), as the average stay length declined for all accommodation types.

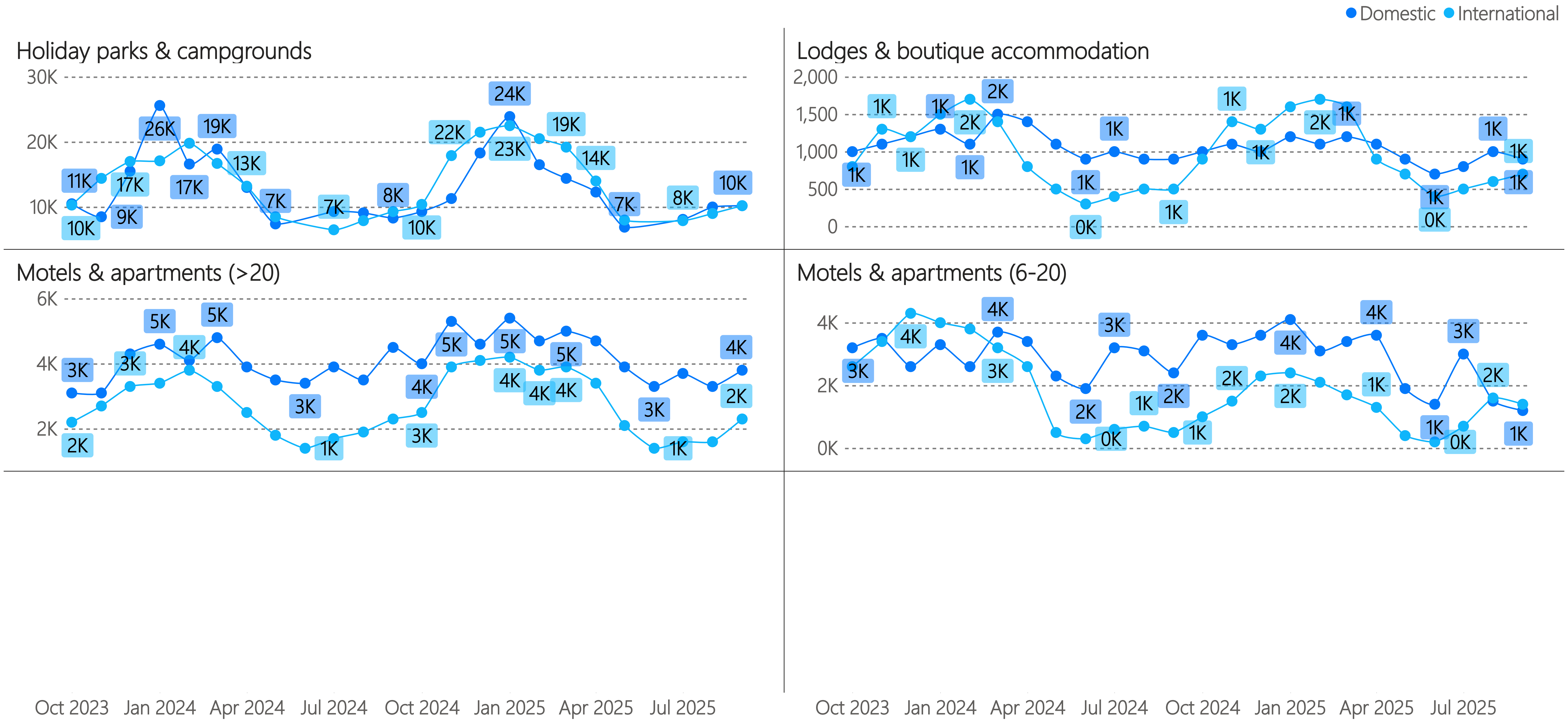
Domestic Guest Nights — Ranked by Accommodation Type



International Guest Nights — Ranked by Accommodation Type



Guest Nights — Trends by Market



Report produced by: vistr Destination Intelligence

Employment Overview

Mackenzie Region - September 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 remained unchanged (0% YoY) for the month of September, slightly behind the national average (+1% YoY), and more so when comparing against neighbouring RTO regions like Central Otago (+9% YoY) and Waitaki (+2% YoY). There was mixed performance in significant employment in tourism-related industries, with accommodation dipping by -4% YoY, while food and beverage services increased by +5%.

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%	$3.151M		▲11%
Accommodation	260	38.8%	▼-4%	$1.308M	41.5%	▲10%
Food and Beverage Services	210	31.3%	▲5%	$0.873M	27.7%	▲11%
Activity Services	55	8.2%	-			-
Recreation Services	55	8.2%	▼-15%	$0.266M	8.4%	▼-1%
Travel and Tour Services	55	8.2%	▼-8%	$0.269M	8.5%	▲5%
Confidentiality Residual	35	5.2%	▼-39%	$0.435M	13.8%	▲86%
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	28,140	81.4%	▲2%		80.8%	▲2%
West Coast	1,980	5.7%	▼-3%		6.1%	▼0%
Timaru	1,680	4.9%	▼-2%		5.0%	▼-2%
Waitaki	960	2.8%	▲2%		2.8%	▲2%
Hurunui	780	2.3%	▼-3%		2.3%	▼-1%
Mackenzie	670	1.9%	▲0%		1.9%	▼-1%
Kaikoura	340	1.0%	▲3%		1.1%	▲0%
All NZ	484,935		▲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	$129M	83.7%	▲10%	$1.6B	83.2%	▲6%
West Coast	$7.8M	5.1%	▲4%	$103M	5.4%	▲3%
Timaru	$6.2M	4.0%	▲13%	$74.6M	3.9%	▲5%
Hurunui	$3.3M	2.1%	▲8%	$42.4M	2.2%	▲5%
Waitaki	$3.2M	2.1%	▲10%	$40.2M	2.1%	▲5%
Mackenzie	$3.2M	2.1%	▲11%	$39.7M	2.1%	▲4%
Kaikoura	$1.5M	0.9%	▲18%	$19.2M	1.0%	▲7%
All NZ	$2.1B		▲8%	$26.7B		▲5%

Published: November 2025 - Mackenzie

Report produced by: vistr Destination Intelligence

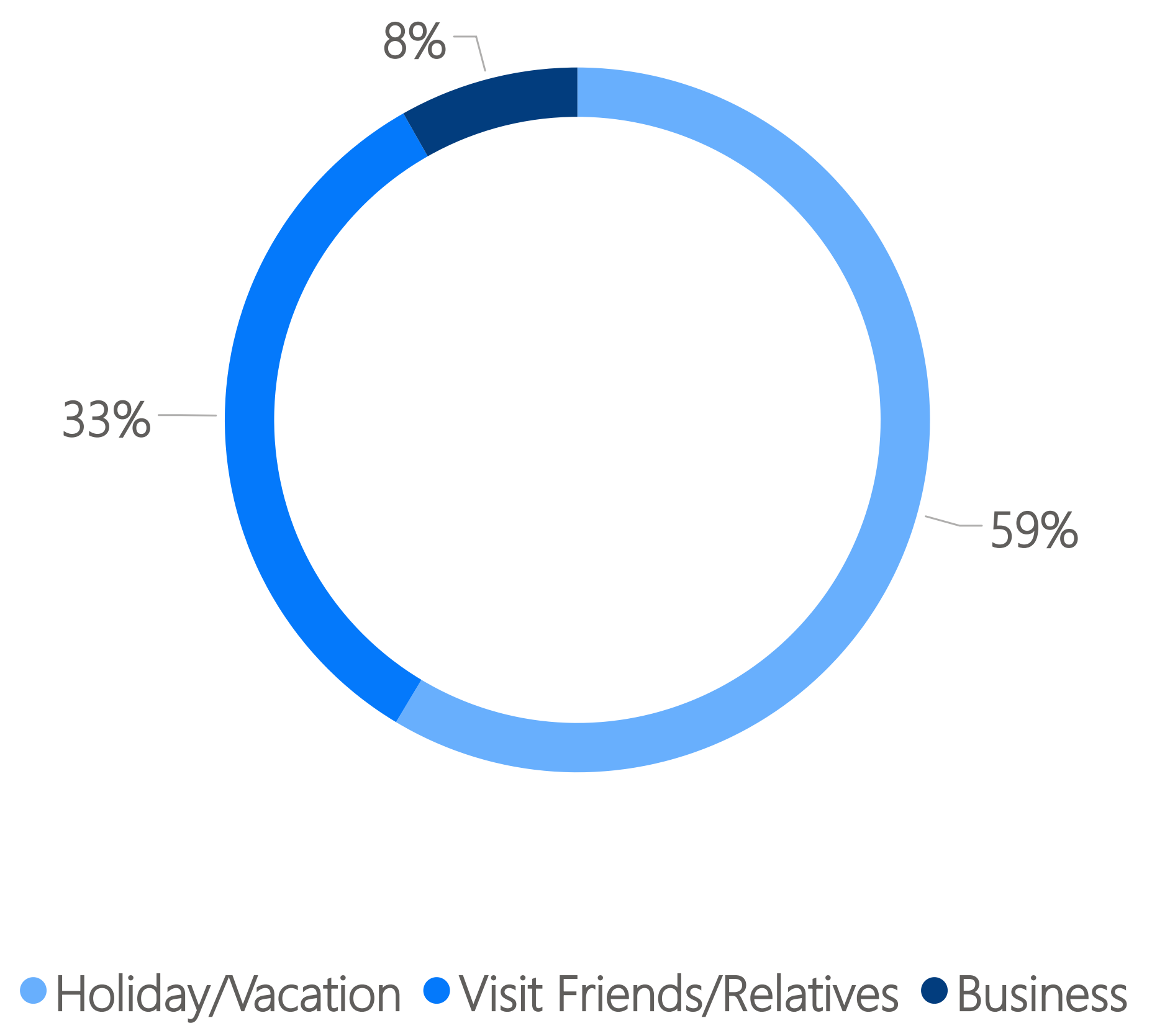
Visitor Arrivals

New Zealand - September 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

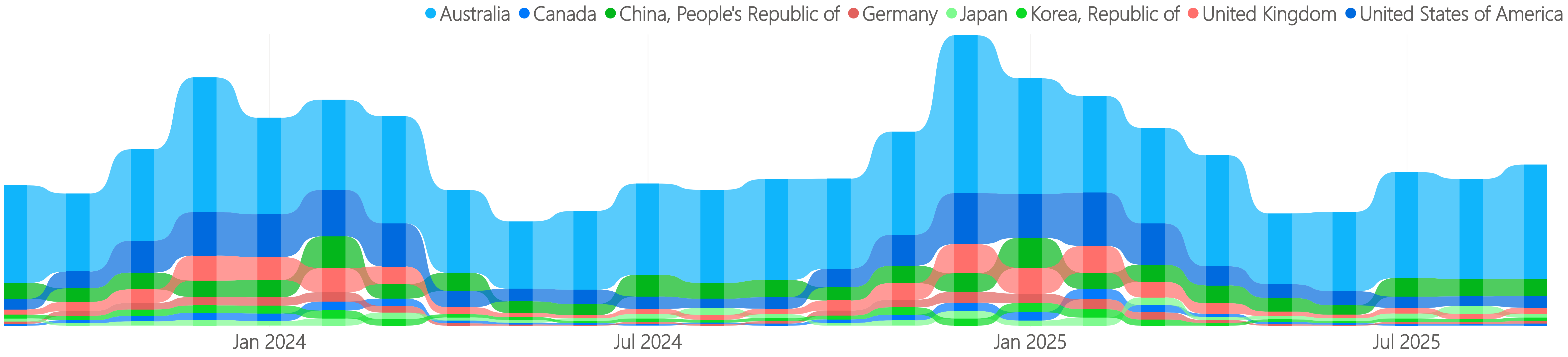
Arrivals by Travel Purpose



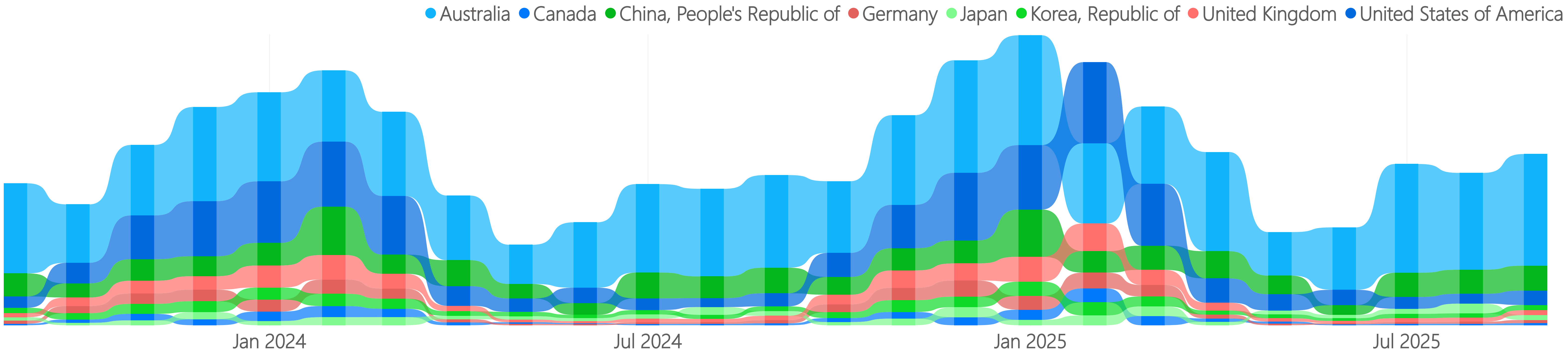
International Visitor Arrivals by Port

	Total	AKL	CHC	ZQN	WLG
	249K	155K	33.7K	42.7K	14.1K
vs. Sep '24	▲10%	▲5%	▲22%	▲9%	▲11%
vs. Sep '19	▼-5%	▼-13%	▼-9%	▲41%	▼-10%

Visitor Arrivals by International Market



Vacation Traveller Arrivals by International Market



Published: November 2025 - Mackenzie

Report produced by: vistr Destination Intelligence