Monthly Destination Performance Report

vistr Destination Intelligence | Mackenzie Region

Visitation / Visitor Days		Visitor Card Spending		Accommodation Occupancy		Tourism-related Employment	
Domestic	International	Domestic	International	Commercial	Short-term Rental	Filled Jobs	Employment Earnings
152K	156K	4.5M$	7.6M$	70%	74%	720	3.4M$
vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24
▲3%	▲24%	▲2%	▲2%	↑ 2%pt.	↑ 2%pt.	▲3%	▲8%
All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ
▲1%	▲10%	▼-4%	▲8%	↑ 1%pt.	↑ 10%pt.	▲0%	▲3%

%pt. - arithmetic difference between the two percentages

Summary

Mackenzie Region - November 2025

Surging international visitor days drive exciting growth in guest nights and card spend
Tourism activity in the Mackenzie Region expanded significantly in November, primarily fueled by the international market. Total visitor days grew +11% YoY, reflecting a +3% YoY increase in domestic visitor days and a +24% YoY surge in international visitor days. Card spend grew by +2% YoY across both domestic and international markets. Commercial accommodation guest nights rose +3% YoY, with domestic guest nights down -2% YoY and international guest nights up +7% YoY. Tourism-related employment grew by +3% YoY.

Increased visitor days suggest day trips are up: international visitor yield dips
The variation between the growth in total domestic visitor days (+3% YoY) and the domestic guest night drop of -2% YoY suggested a higher prevalence of day trip visitation. Similarly, the international visitor day surge of +24% YoY when contrasted with the increase in international guest nights of +7% YoY suggested the same; a higher prevalence of day trip visitation. Regarding visitor yield, the domestic sector showed that visitor days (-2% YoY) and card spend (+2% YoY) were within a narrow margin, indicating average spend per visitor remained stable, whereas the international sector suggested average spend had decreased, as visitor days (+24% YoY) grew at a significantly faster rate than card spend (+2% YoY).

International short-stay visitation drive significant expansion in overall activity
Tourism activity in the Mackenzie Region expanded significantly in November - total visitor days grew (+11% YoY), while total monthly unique visitors rose (+13% YoY). This growth was primarily fueled by the international market, where visitor days jumped (+24% YoY) and short-stay international visitor days even more so (+28% YoY). The domestic market also contributed positively, with visitor days increasing (+3% YoY) and unique visitor numbers growing (+3% YoY).

European surge shifts market dynamics while domestic growth dominates share
International visitation trends highlighted a significant shift in market dynamics. The 'Rest of Europe' market more than doubled, soaring by +129% YoY to claim the second spot in November - a much more substantial increase than observed in November 2024. In contrast, the Australian market showed signs of instability following October 2025. While still growing year-on-year (+106%), it fell to third place, overtaken by the European surge. China, Japan & Korea remained the top market despite a decline (-5% YoY). Domestic visitation was driven by Canterbury (+14% YoY), which solidified its dominance (45% share), while other key source markets like Auckland (-33% YoY) and Wellington (-17% YoY) contracted.

Visitors prefer self-catering accommodation as retail F&B rise food and beverage serving drops
Card spend in the Mackenzie Region grew moderately in November, with both domestic and international markets recording a +2% YoY increase. A clear shift in visitor behaviour was evident; spend on 'Accommodation' rose significantly compared to November 2024, surging +21% YoY for the domestic market and growing +2% YoY for international visitors. Domestic spend on 'Food and Beverage Serving' declined by -13% YoY, and international spend dipped -2% YoY. Conversely, 'Retail F&B' grew across both markets (Domestic: +6% YoY, International: +12% YoY), highlighting a distinct preference for self-catering over dining out.

Strong nearby visitor reliance boosts domestic spend despite key market decline
Domestic card spend increased by +2% YoY in November. The market remained heavily reliant on visitors from Canterbury, who account for 53% of all domestic spend and grew their contribution by +3% YoY. Otago also performed steadily, growing +3% YoY. While key North Island markets softened (Auckland fell -8% YoY and Wellington dropped -15% YoY), visitors from the Waikato provided a massive boost, with spend surging +73% YoY, albeit off a smaller base.

International card spend rises as one market leaps despite major softening elsewhere
International card spend rose by +2% YoY, anchored by the United States, which grew +11% YoY to contribute (35% market share). Outside of the US, performance among major markets was softer than the visitation numbers might suggest. Spend from the 'Rest of Asia' (-7% YoY), 'Rest of Europe' (-4% YoY), and Australia (-4% YoY) all contracted. However, the China market leapt, recording a +35% YoY increase in spend.

Accommodation occupancy and guest nights rise, led by international visitors despite shorter average stay
Commercial accommodation in the Mackenzie Region performed positively in November, with total guest nights rising +3% YoY. Occupancy increased (+2%pt. YoY), supported by a contraction in available stay units (-2% YoY). Guest arrivals grew (+7% YoY), though the average stay length shortened (-4% YoY). The market mix leaned heavily towards international visitors, whose guest nights increased (+7% YoY), while domestic guest nights dipped (-2% YoY). Short-term rental accommodation also saw gains, with occupancy reaching 92% over Canterbury Anniversary Weekend.

International guest nights drive motel growth, holiday parks suffer domestic decline
Segmenting by accommodation type, motels and apartments (20+ units) recorded substantial growth in total guest nights (+32% YoY), driven by a surge in international demand (+51% YoY) and strong domestic performance too (+17% YoY). Smaller motels and apartments (6-20 units) followed a similar trajectory, growing (+25% YoY) on the back of a +53% YoY jump in international guest nights. Conversely, holiday parks and campgrounds contracted (-12% YoY), weighed down by a significant decline in domestic guest nights (-21% YoY) and a drop in international nights (-6% YoY).

Strong region job growth outpaced the nation, despite contracted recreation services
Tourism-related employment in the Mackenzie Region grew by +3% YoY in November, outperforming the national average (0% YoY) and neighbouring region Timaru (-1% YoY). The region's largest tourism-related employment industry, accommodation (42% of filled jobs), remained flat (0% YoY), as did travel and tour services and air passenger transport services. Growth was primarily driven by food and beverage services, which increased (+5% YoY), while recreation services contracted (-14% YoY).

Visitation Overview

Mackenzie Region - November 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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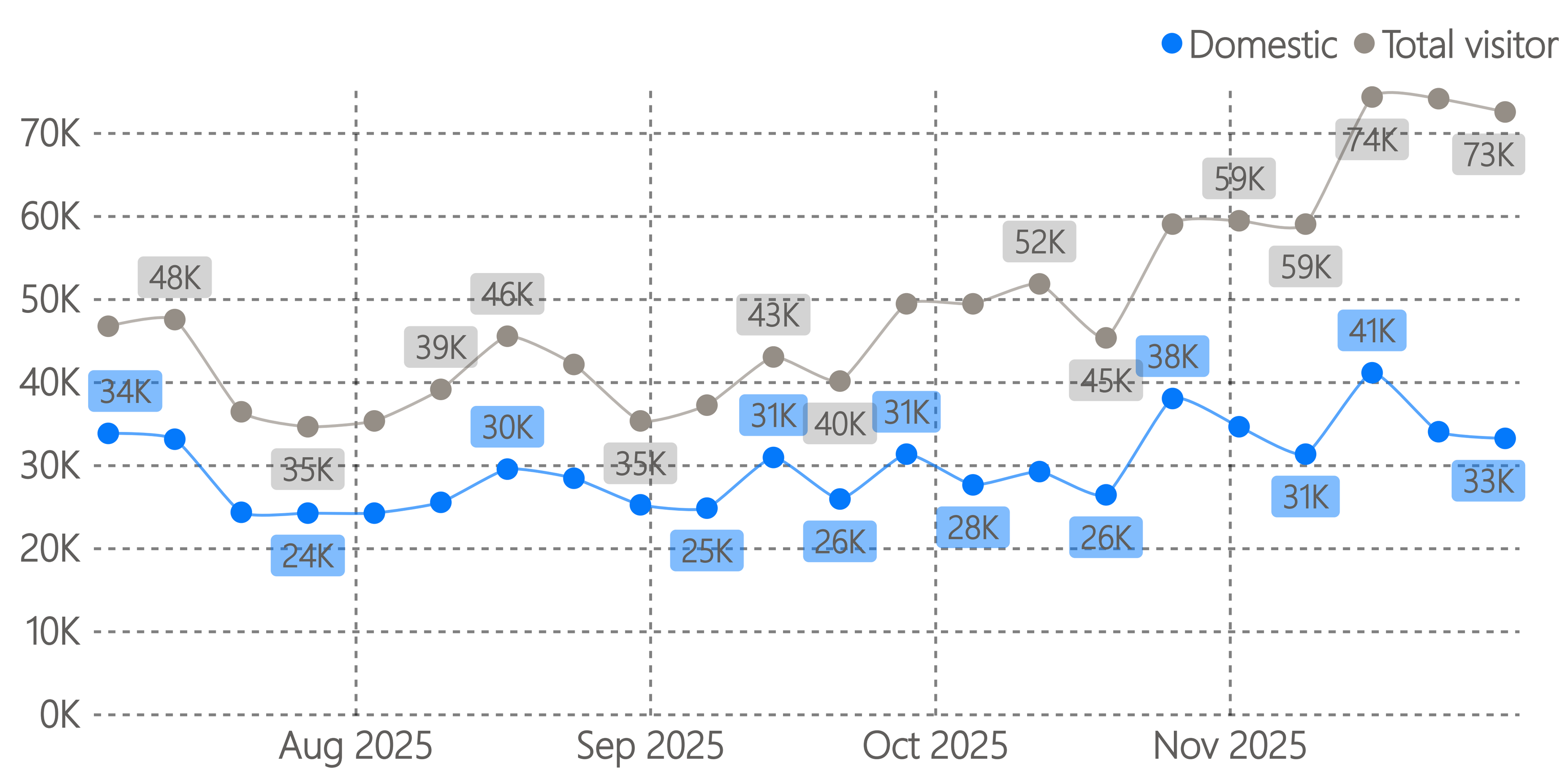
Visitation

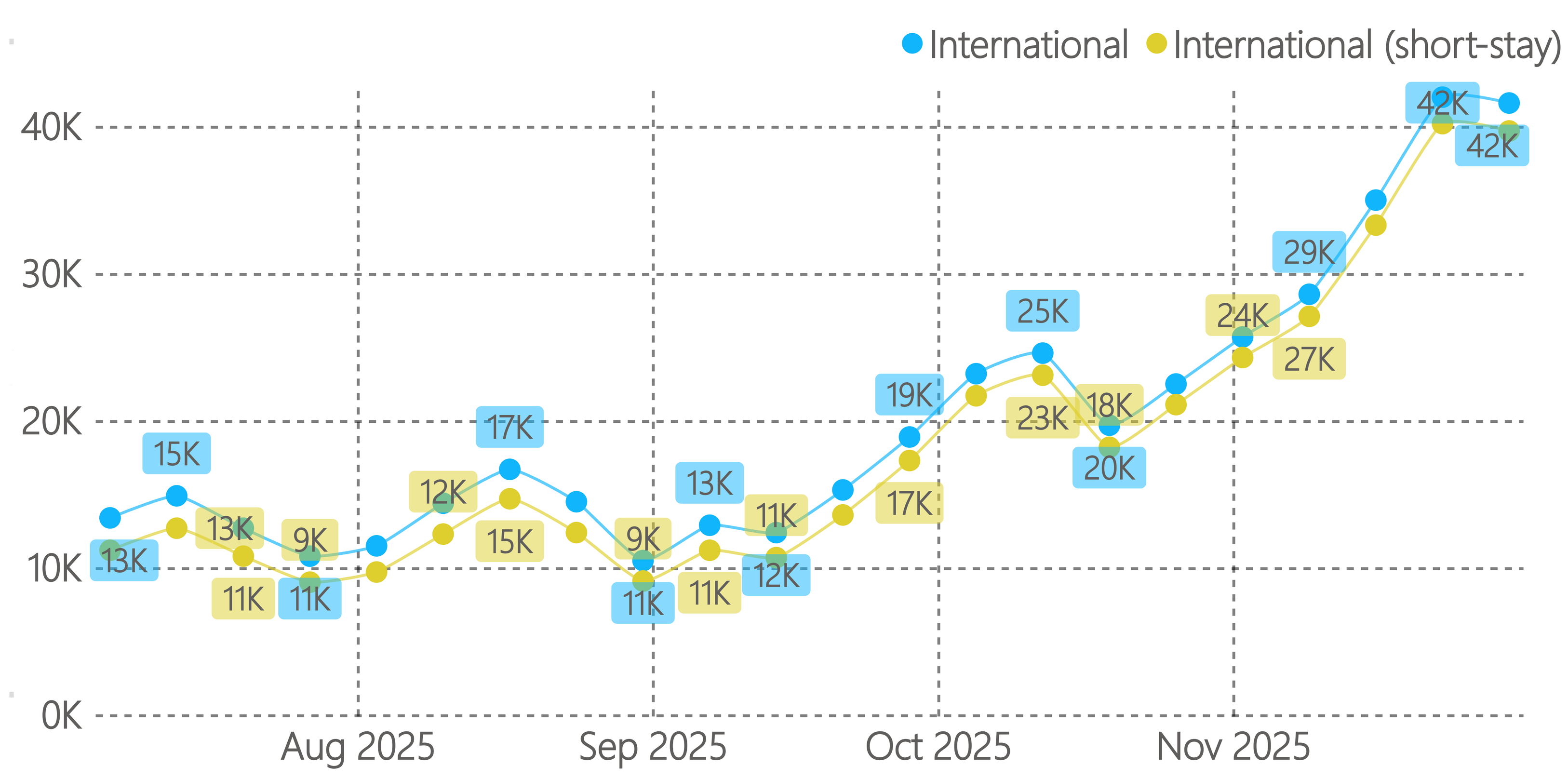
Total Visitor Days	Domestic Visitor Days	Total International Visitor Days	International (Short Stay) Visitor Days
301K	152K	156K	148K
vs. Nov '24 ▲11%	vs. Nov '24 ▲3%	vs. Nov '24 ▲24%	vs. Nov '24 ▲28%

Total Monthly Unique Visitors	Domestic Monthly Unique Visitors	Total International Monthly Unique Visitors	International Short Stay Monthly Unique Visitors
303K	153K	153K	150K
vs. Nov '24 ▲13%	vs. Nov '24 ▲3%	vs. Nov '24 ▲25%	vs. Nov '24 ▲26%

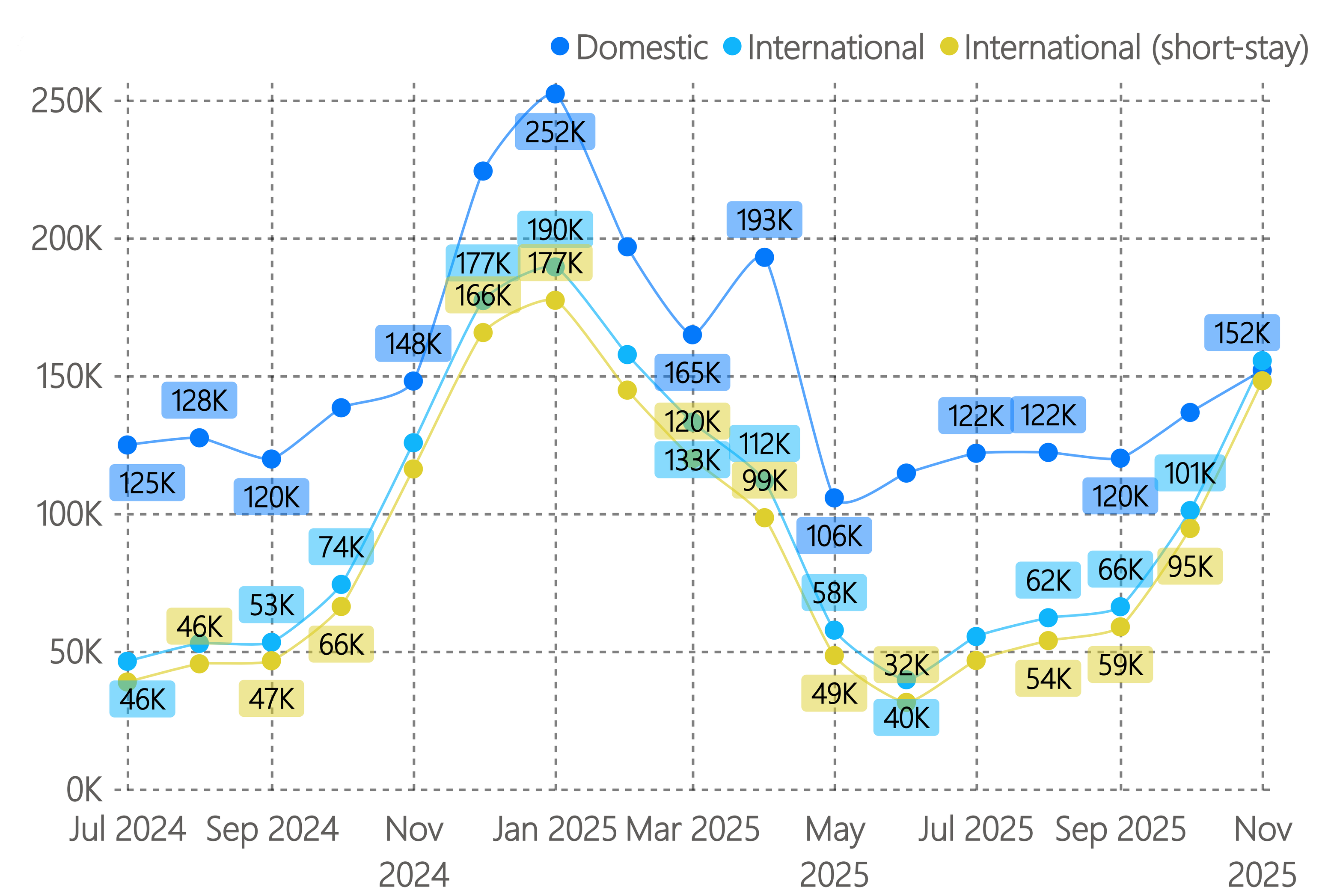
Note: Visitor days represent the cumulative sum of peak daytime visitor counts. To most accurately capture peak daily total visitor counts these are calculated separately from domestic and international, as peak times may vary between the domestic and international visitor populations."

Peak Daytime Visitor Volume

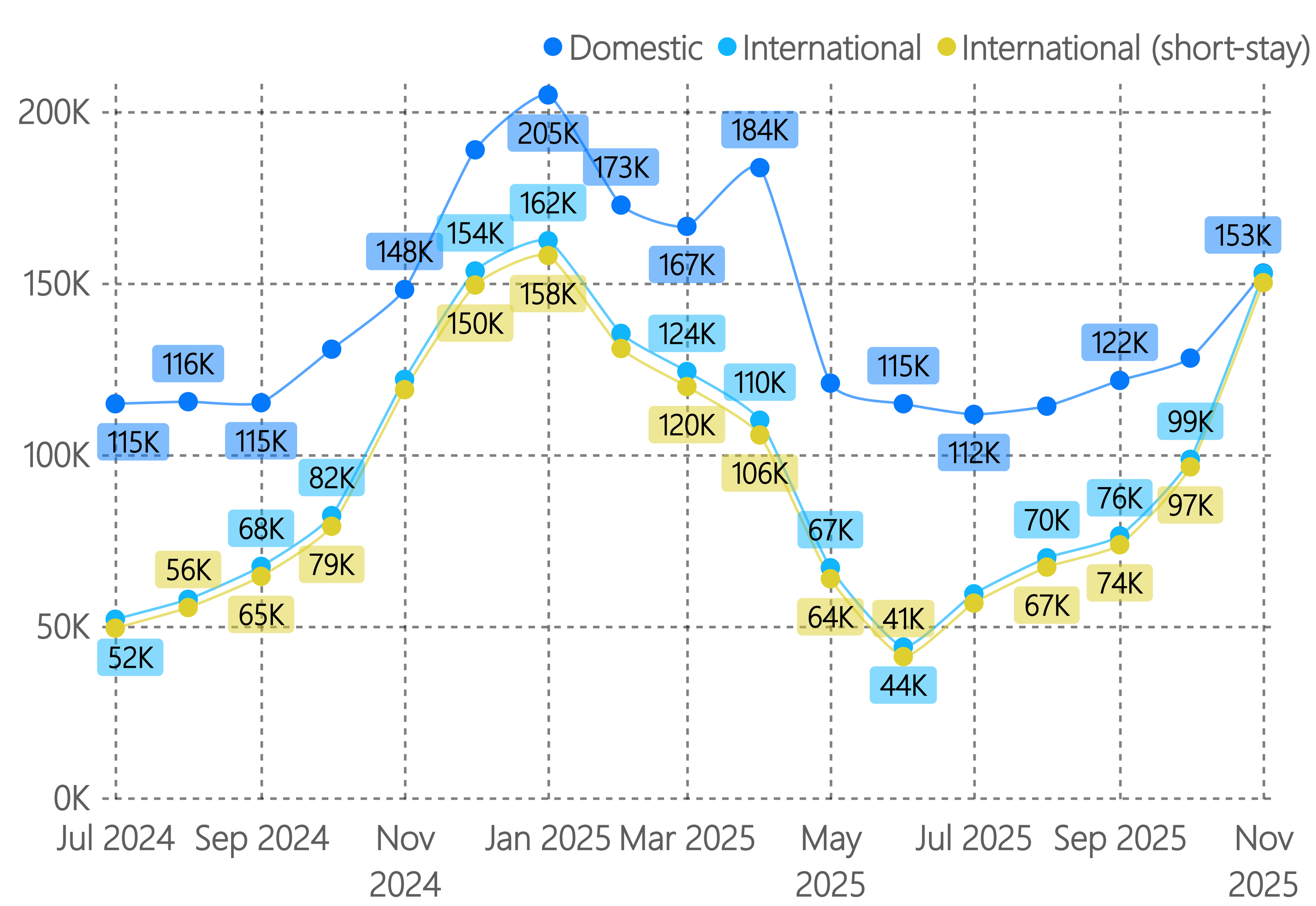




Monthly Visitor Days



Monthly Unique Visitors



Visitation Overview

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Visitation Benchmark Comparison

Total Visitor

Measure	Unique Visitors			Visitor Days		
RTO	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	656K	17.1%	▲7%	1.3M	25.2%	▲11%
Queenstown	383K	10.0%	▲16%	681K	13.5%	▲18%
Marlborough	278K	7.2%	▲6%	540K	10.7%	▼-1%
Waitaki	402K	10.5%	▲7%	260K	5.2%	▲3%
Dunedin	273K	7.1%	▲6%	388K	7.7%	▲6%
Timaru	374K	9.7%	▲5%	270K	5.4%	▼-2%
Mackenzie	303K	7.9%	▲13%	301K	6.0%	▲11%
Nelson Tasman	198K	5.1%	▲8%	401K	7.9%	▲9%
Wanaka	266K	6.9%	▲24%	296K	5.9%	▲23%
West Coast	203K	5.3%	▲16%	317K	6.3%	▲28%
Hurunui	326K	8.5%	▲1%	103K	2.0%	▲5%
Kaikoura	179K	4.7%	▲7%	221K	4.4%	▲14%
All NZ	3.9M		▼0%	18.9M		▲4%

Domestic

Measure	Unique Visitors			Visitor Days		
RTO	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	465K	18.8%	▼0%	694K	22.7%	▲1%
Marlborough	194K	7.8%	▼-2%	395K	13.0%	▼-1%
Queenstown	193K	7.8%	▲6%	306K	10.0%	▲6%
Timaru	261K	10.5%	▼-4%	220K	7.2%	▼-4%
Dunedin	199K	8.0%	▼-1%	278K	9.1%	▲4%
Waitaki	252K	10.2%	▼-2%	201K	6.6%	▼0%
Nelson Tasman	139K	5.6%	▼0%	228K	7.5%	▲1%
Hurunui	253K	10.2%	▼-6%	67K	2.2%	▼0%
Mackenzie	153K	6.2%	▲3%	152K	5.0%	▲3%
West Coast	118K	4.8%	▲5%	181K	5.9%	▲14%
Kaikoura	120K	4.8%	▼-3%	174K	5.7%	▲5%
Wanaka	129K	5.2%	▲6%	155K	5.1%	▲7%
All NZ	3.4M		▼-3%	12.5M		▲1%

Total International

Measure	Unique Visitors			Visitor Days		
RTO	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	201K	14.3%	▲29%	584K	28.5%	▲25%
Queenstown	194K	13.8%	▲28%	385K	18.8%	▲30%
Mackenzie	153K	10.9%	▲25%	156K	7.6%	▲24%
Wanaka	140K	9.9%	▲46%	143K	7.0%	▲47%
Nelson Tasman	62K	4.4%	▲30%	176K	8.6%	▲22%
Marlborough	87K	6.2%	▲25%	148K	7.2%	▲1%
West Coast	87K	6.2%	▲37%	140K	6.8%	▲52%
Waitaki	153K	10.9%	▲26%	62K	3.0%	▲13%
Dunedin	77K	5.5%	▲25%	115K	5.6%	▲14%
Timaru	116K	8.3%	▲30%	53K	2.6%	▲10%
Hurunui	76K	5.4%	▲35%	39K	1.9%	▲17%
Kaikoura	61K	4.3%	▲33%	50K	2.5%	▲50%
All NZ	558K		▲15%	6.4M		▲10%

International

Measure	Unique Visitors			Visitor Days		
RTO	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	191K	14.0%	▲33%	451K	25.5%	▲41%
Queenstown	190K	13.9%	▲29%	355K	20.1%	▲37%
Mackenzie	150K	11.0%	▲26%	148K	8.4%	▲28%
Wanaka	137K	10.0%	▲48%	133K	7.5%	▲57%
West Coast	85K	6.2%	▲38%	133K	7.5%	▲59%
Marlborough	84K	6.1%	▲28%	132K	7.5%	▲8%
Nelson Tasman	59K	4.3%	▲32%	150K	8.4%	▲31%
Waitaki	150K	11.0%	▲27%	53K	3.0%	▲22%
Dunedin	74K	5.4%	▲28%	90K	5.1%	▲46%
Timaru	113K	8.3%	▲32%	44K	2.5%	▲28%
Hurunui	73K	5.4%	▲38%	35K	2.0%	▲34%
Kaikoura	59K	4.3%	▲36%	48K	2.7%	▲54%
All NZ	497K		▲23%	5.0M		▲29%

Domestic Visitation

Mackenzie Region - November 2025

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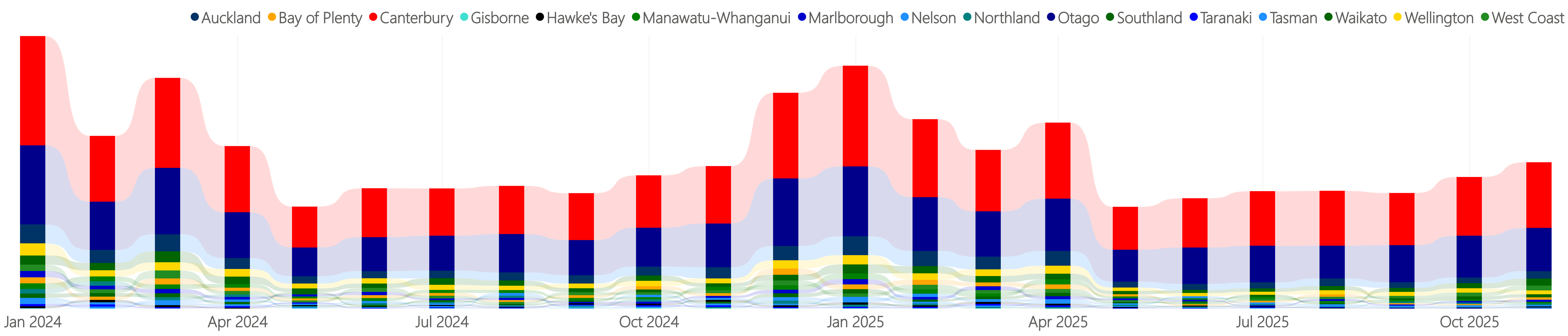
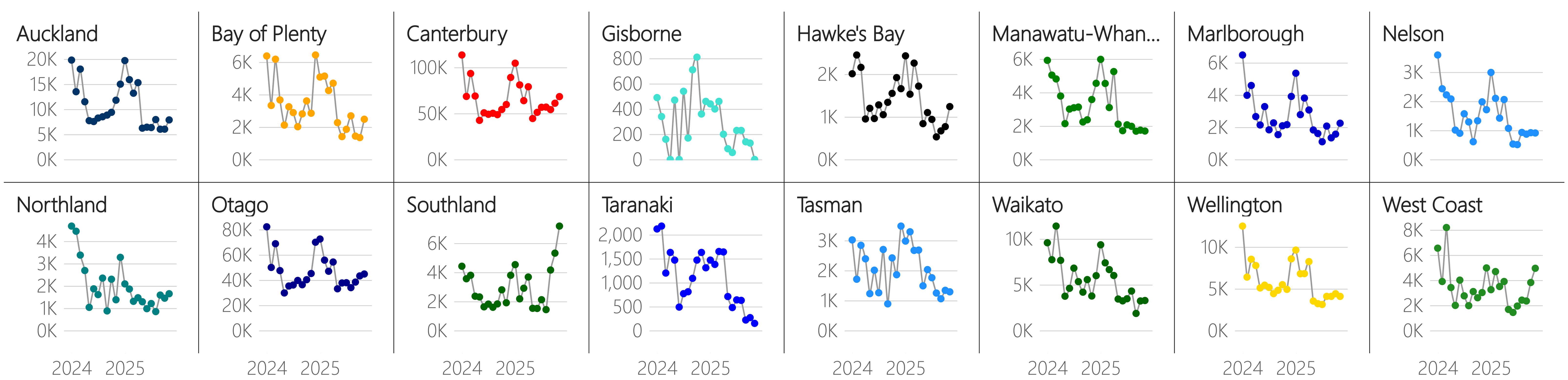
Domestic Visitation — Table by Market

Visitor Origin by Regional Council	Domestic Visitor Days	Share of Domestic Visitor Days	YoY Domestic Visitor Days
Canterbury	68,300	44.9%	▲14%
Otago	44,800	29.4%	▼-1%
Auckland	7,880	5.2%	▼-33%
Southland	7,180	4.7%	▲276%
West Coast	4,950	3.3%	▲64%
Wellington	4,090	2.7%	▼-17%
Waikato	3,280	2.2%	▼-13%
Bay of Plenty	2,480	1.6%	▼-13%
Marlborough	2,250	1.5%	▲4%
Manawatu-Whanganui	1,700	1.1%	▼-53%
Northland	1,650	1.1%	▲20%
Tasman	1,290	0.8%	▼-31%
Hawke's Bay	1,240	0.8%	▼-35%
Nelson	910	0.6%	▼-54%
Taranaki	150	0.1%	▼-91%
Gisborne	0	0.0%	-

Domestic Visitation — Ranked by Market



Domestic Visitation Trends — by Domestic Market



Report produced by: vistr Destination Intelligence

Visitation | Card Spend | Accommodation | Employment | Visitor Arrivals

International Visitation

Mackenzie Region - November 2025

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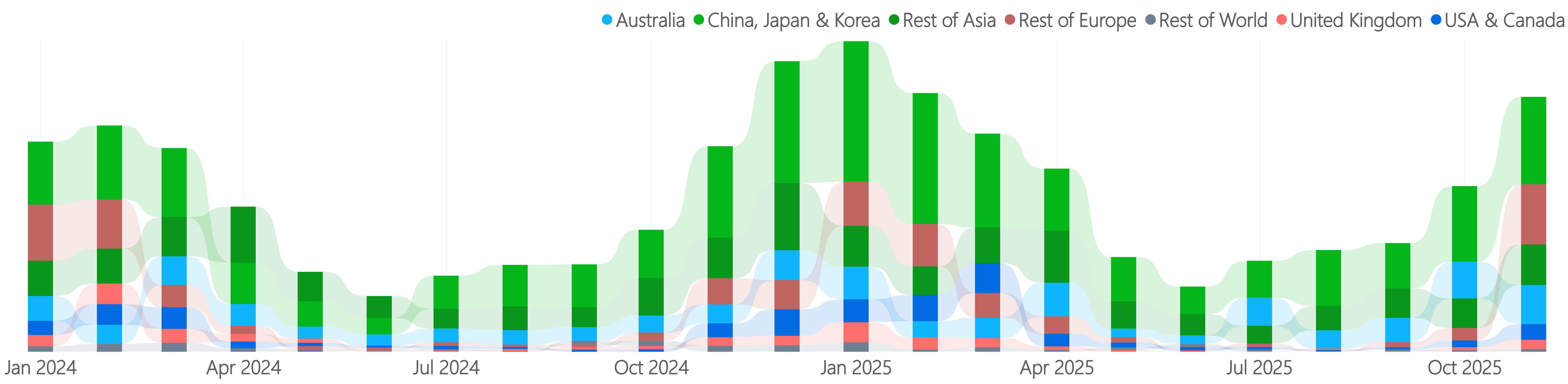
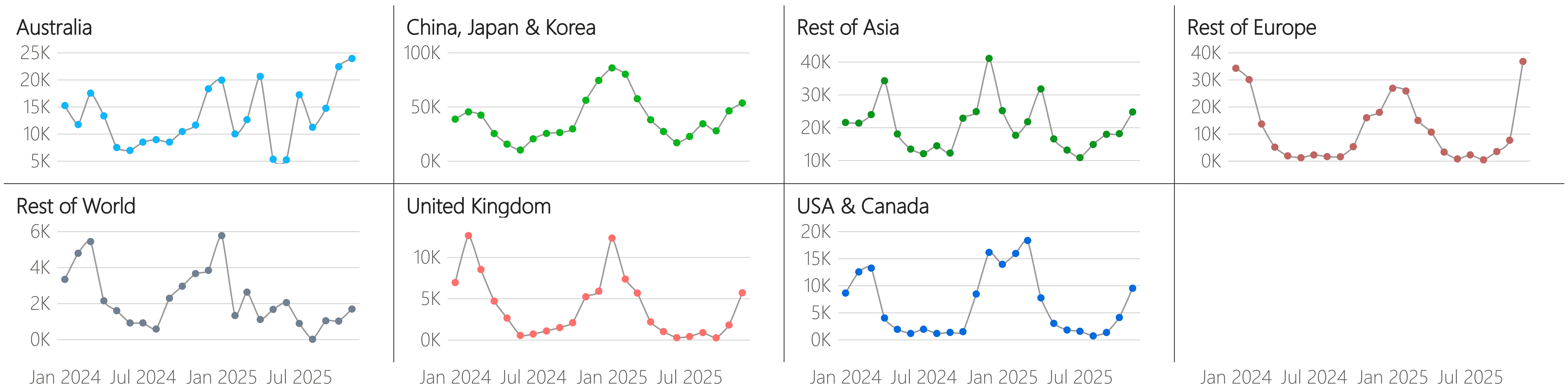
International Visitation — Table by Market

Overseas markets	International total visitor days	Share of Total International Visitor Days	YoY Total International Visitor Days
Australia	23,900	15.4%	▲106%
China, Japan & Korea	53,400	34.3%	▼-4%
Rest of Asia	24,700	15.9%	▼0%
Rest of Europe	36,700	23.6%	▲131%
Rest of World	1,680	1.1%	▼-54%
United Kingdom	5,680	3.7%	▲9%
USA & Canada	9,480	6.1%	▲13%

International Visitation — Ranked by Market



International Visitation Trends — by International Markets



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Card Spend	Accommodation	Employment	Visitor Arrivals

Card Spend Overview

Mackenzie Region - November 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.

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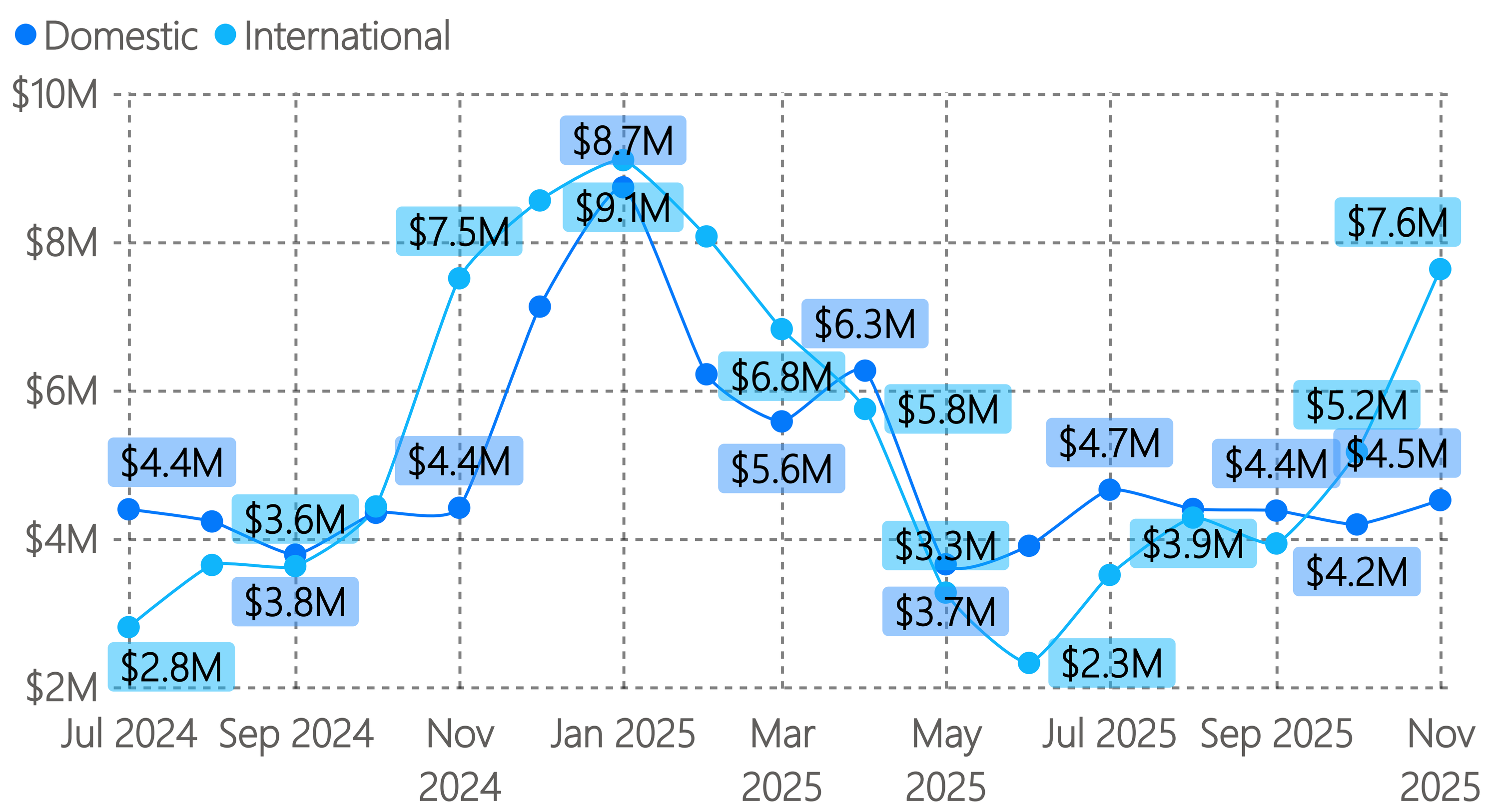
Card Spend

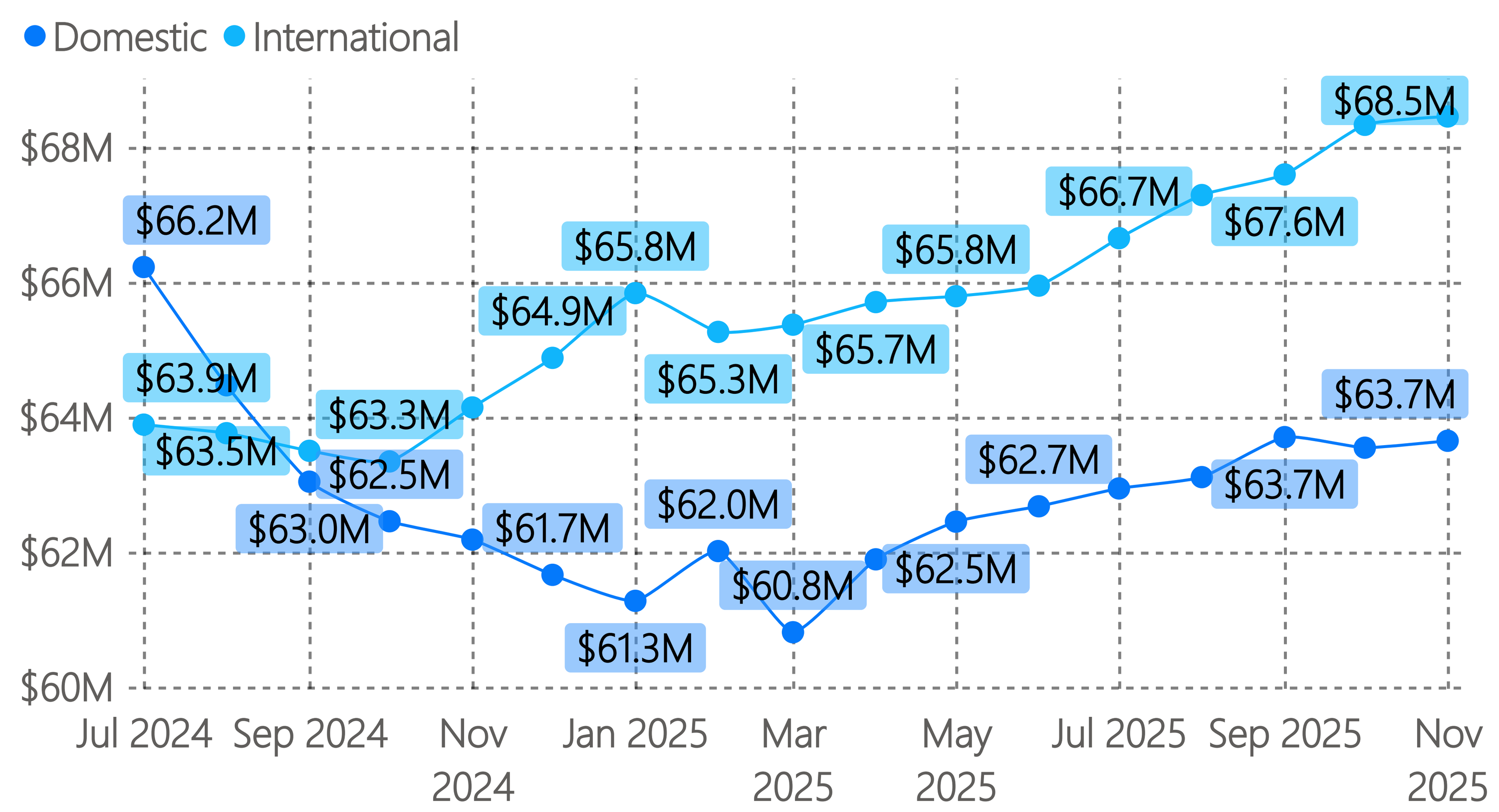
Domestic	International	Year-Ending Domestic	Year-Ending International
4.5M$	**7.6M$**	**63.7M$**	**68.5M$**
vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24
▲2%	▲2%	▲2%	▲7%

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	76.7M	53.2%	▼-8%	924M	52.9%	▼-6%
Timaru	15.9M	11.0%	▼-1%	180M	10.3%	▼-4%
Marlborough	13.3M	9.2%	▲5%	163M	9.3%	▼0%
West Coast	12.1M	8.4%	▲10%	152M	8.7%	▲3%
Waitaki	9.1M	6.3%	▲3%	112M	6.4%	▲3%
Hurunui	7.5M	5.2%	▼-4%	93.8M	5.4%	▲1%
Kaikoura	5.3M	3.7%	▲7%	59.7M	3.4%	▲5%
Mackenzie	4.5M	3.1%	▲2%	63.7M	3.6%	▲2%
All NZ	905M		▼-4%	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	39.0M	54.3%	▲5%	399M	57.3%	▲9%
West Coast	10.3M	14.3%	▲22%	87.6M	12.6%	▲0%
Mackenzie	7.6M	10.6%	▲2%	68.5M	9.8%	▲7%
Marlborough	5.5M	7.7%	▲5%	51.7M	7.4%	▲3%
Kaikoura	3.3M	4.5%	▲6%	28.6M	4.1%	▲3%
Waitaki	2.5M	3.5%	▲5%	23.5M	3.4%	▲11%
Timaru	2.2M	3.1%	▲7%	21.3M	3.1%	▲12%
Hurunui	1.4M	1.9%	▼-9%	15.7M	2.3%	▼-5%
All NZ	401M		▲8%	4.1B		▲8%

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Card Spend by Product

Mackenzie Region - November 2025

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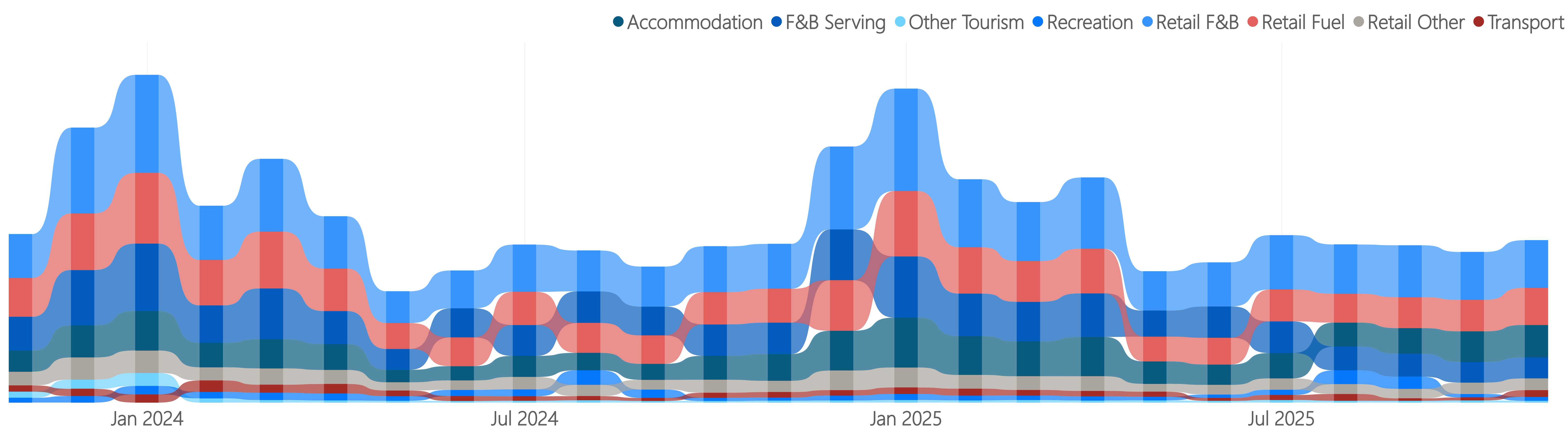
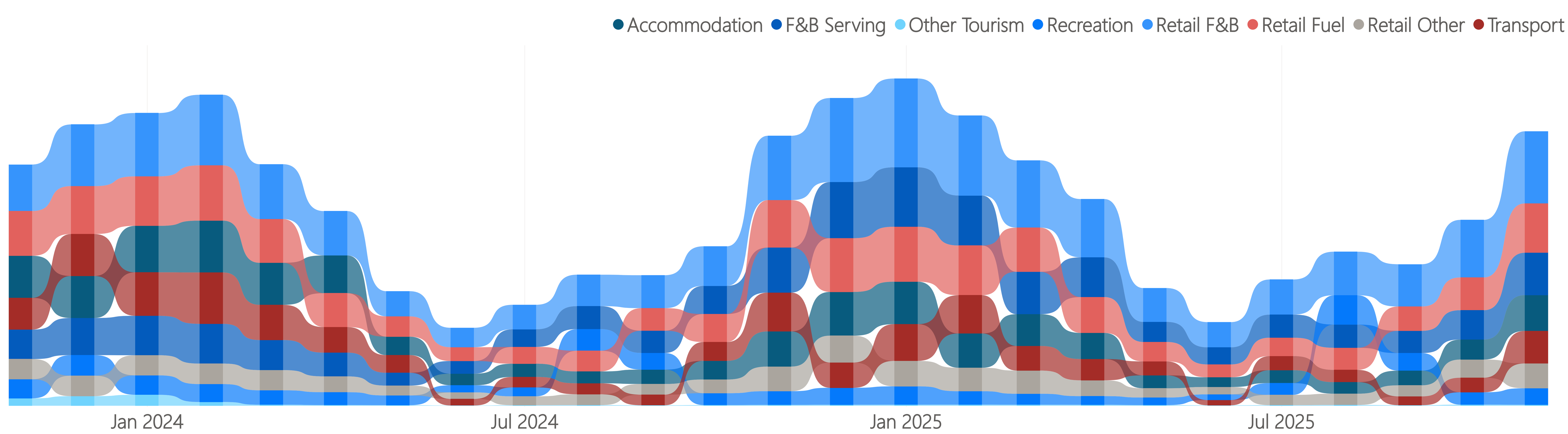
Product Overview

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	$1,327,455	29.4%	▲6%	▲58%	$2,007,200	26.3%	▲12%	▲184%
Retail Fuel	$1,032,297	22.8%	▲10%	▲29%	$1,371,619	18.0%	▲4%	▲66%
Accommodation	$903,729	20.0%	▲21%	▲32%	$998,391	13.1%	▲2%	▼-48%
F&B Serving	$585,658	13.0%	▼-33%	▼-34%	$1,178,755	15.4%	▼-6%	▲50%
Retail Other	$326,105	7.2%	▲4%	▲20%	$691,122	9.1%	▲1%	▲110%
Transport	$186,192	4.1%	▲20%	▲85%	$902,361	11.8%	▼-16%	▲19%
Recreation	$111,582	2.5%	▲30%	▼-33%	$459,498	6.0%	▲21%	▲4%
Other Tourism	$47,898	1.1%	▼-9%	▼-69%	$26,549	0.3%	▲12%	▼-84%

Domestic Card Spend — Ranked by Product Type



International Card Spend — Ranked by Product Type



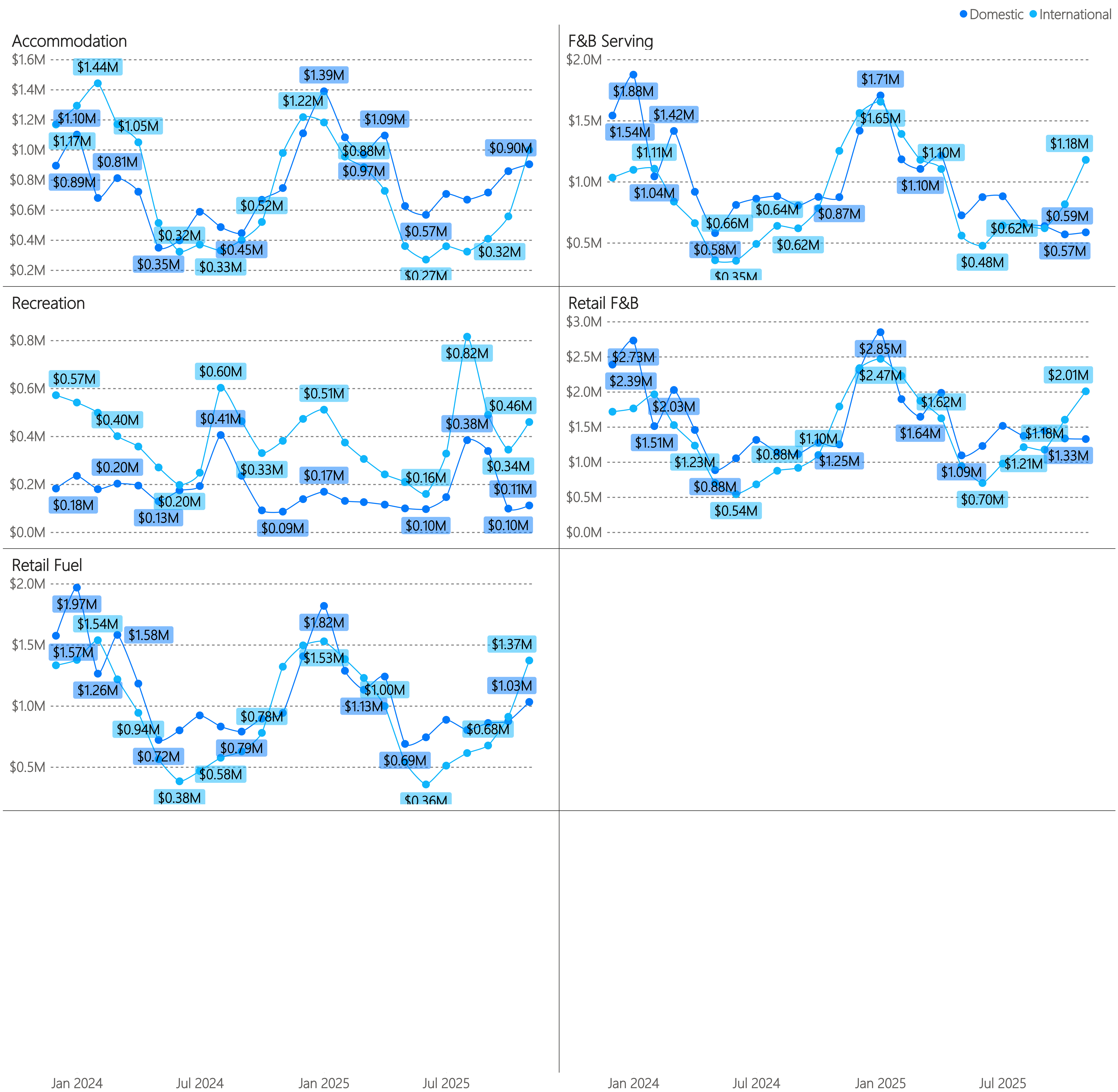
Card Spend by Product

Mackenzie Region - November 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.

> Card spend in the Mackenzie Region grew moderately in November, with both domestic and international markets recording a +2% YoY increase. A clear shift in visitor behaviour was evident; spend on 'Accommodation' rose significantly compared to November 2024, surging +21% YoY for the domestic market and growing +2% YoY for international visitors. Domestic spend on 'Food and Beverage Serving' declined by -13% YoY, and international spend dipped -2% YoY.

Trends by Product



Card Spend | Accommodation | Employment | Visitor Arrivals

Domestic Card Spend

Mackenzie Region - November 2025

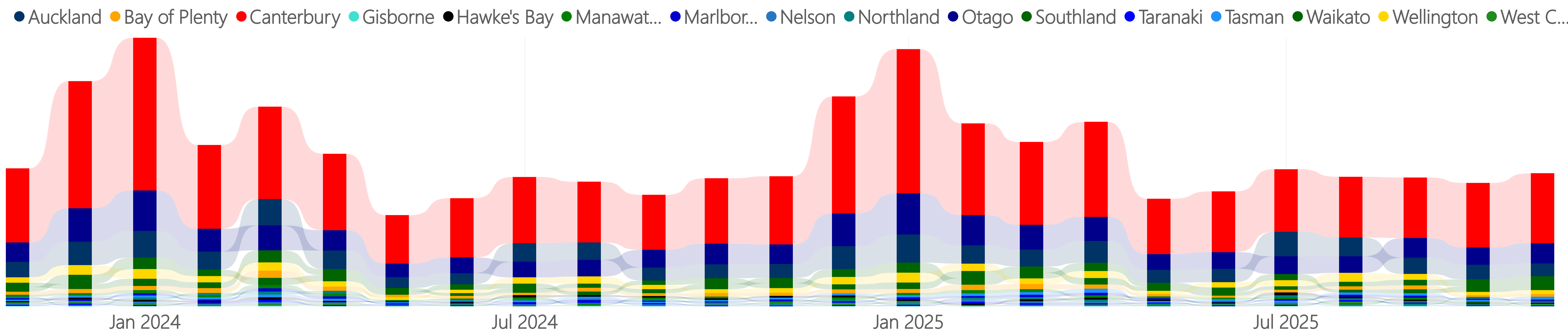
Note: As of December '25, MBIE have resumed provision of the TECTs and we have updated this data contained in this report to replace the Vistr estimates that were used whilst this was unavailable. This may result in some differences in the data previously reported on between July and September '25.

Domestic card spend increased by +2% YoY in November. The market remained heavily reliant on visitors from Canterbury, who account for 53% of all domestic spend and grew their contribution by +3% YoY. Otago also performed steadily, growing +3% YoY.

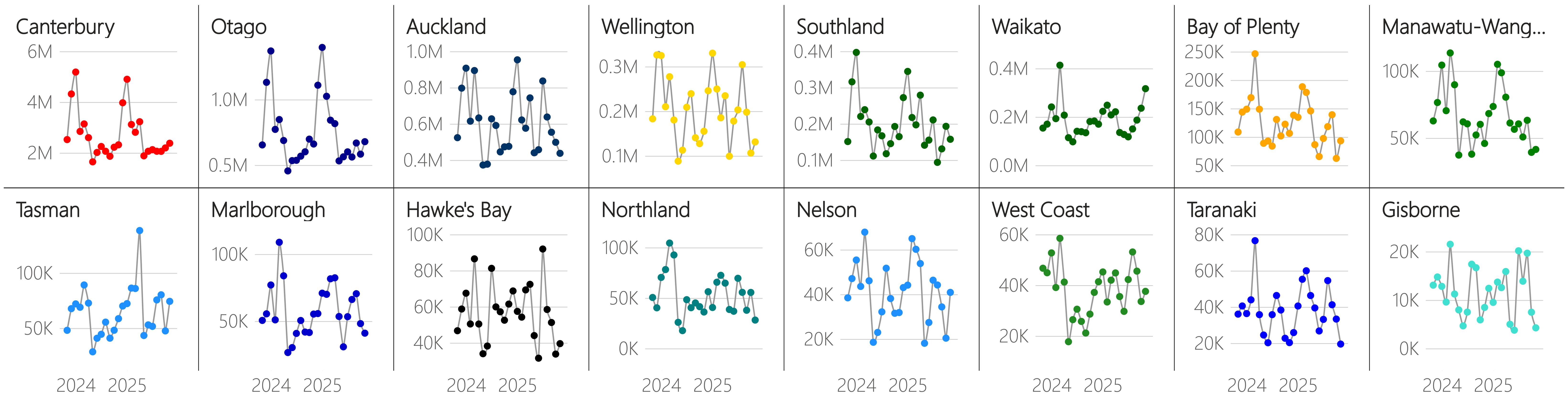
Domestic Spend — Table by Market

NZ Region	Domestic Card Spend	Share of Domestic Card Spend	YoY Domestic Card Spend	Domestic Card Spend vs. 2019
Canterbury	$2,379,248	52.6%	▲3%	▲10%
Otago	$678,733	15.0%	▲3%	▲18%
Auckland	$437,475	9.7%	▼-8%	▼-2%
Waikato	$316,673	7.0%	▲73%	▲162%
Southland	$157,441	3.5%	▼-4%	▲21%
Wellington	$131,277	2.9%	▼-15%	▼-4%
Bay of Plenty	$93,224	2.1%	▼-12%	▲28%
Tasman	$74,320	1.6%	▲27%	▲86%
Manawatu-Wanganui	$41,483	0.9%	▼-10%	▲20%
Marlborough	$41,021	0.9%	▼-26%	▲45%
Nelson	$40,886	0.9%	▲28%	▲80%
Hawke's Bay	$39,564	0.9%	▼-36%	▲24%
West Coast	$37,587	0.8%	▲1%	▼-8%
Northland	$28,181	0.6%	▼-22%	▼-10%
Taranaki	$19,536	0.4%	▼-4%	▲16%
Gisborne	$4,270	0.1%	▼-50%	▼-64%

Domestic Spend — Ranked by Market



Card Spend Trends — by Domestic Market



Card Spend | Accommodation | Employment | Visitor Arrivals

International Card Spend

Mackenzie Region - November 2025

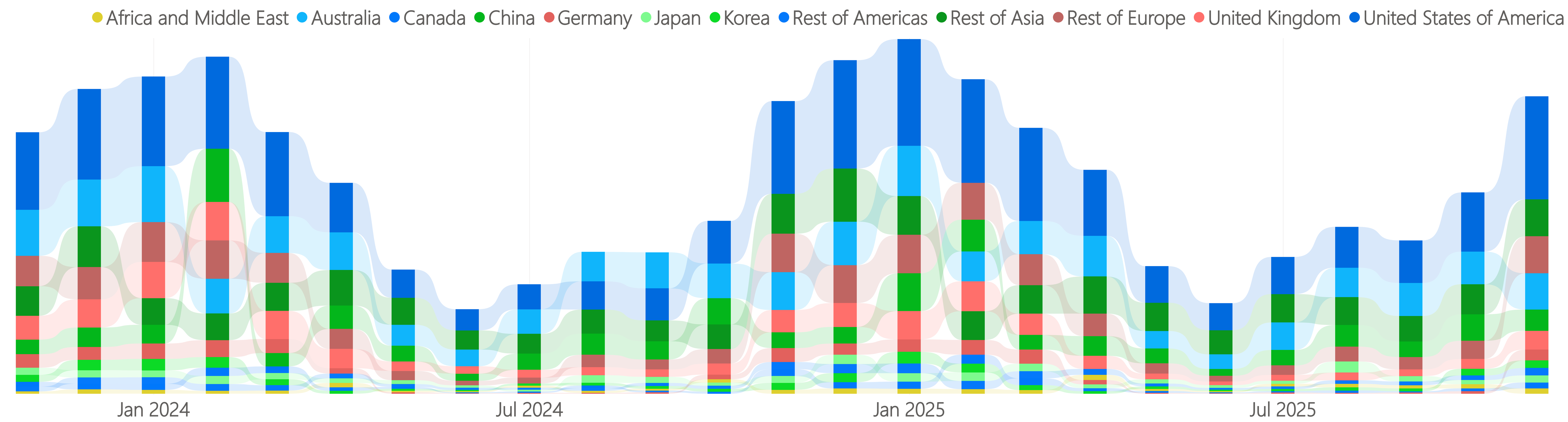
Note: As of December '25, MBIE have resumed provision of the TECTs and we have updated this data contained in this report to replace the Vistr estimates that were used whilst this was unavailable. This may result in some differences in the data previously reported on between July and September '25.

> International card spend rose by +2% YoY, anchored by the United States, which grew +11% YoY to contribute (35% market share). Outside of the US, performance among major markets was softer than the visitation numbers might suggest. Spend from the 'Rest of Asia' (-7% YoY), 'Rest of Europe' (-4% YoY), and Australia (-4% YoY) all contracted.

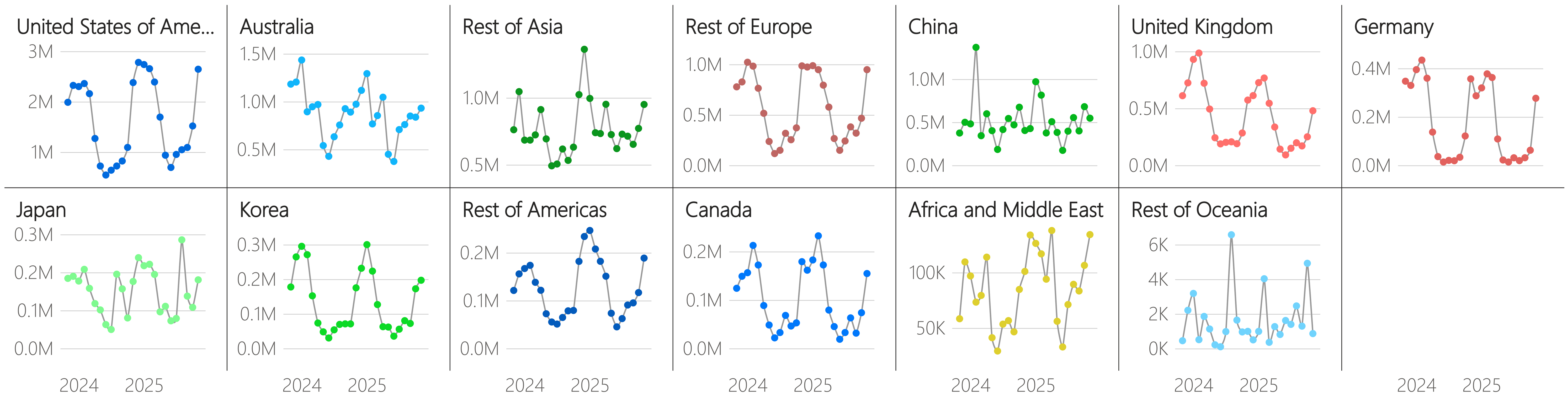
International Spend — Table by Market

Overseas Markets	International Card Spend	Share of International Card Spend	YoY International Card Spend	International Card Spend vs. 2019
United States of America	$2,645,020	34.6%	▲11%	▲167%
Rest of Asia	$950,319	12.4%	▼-7%	▲49%
Rest of Europe	$947,933	12.4%	▼-4%	▲31%
Australia	$931,980	12.2%	▼-4%	▼-21%
China	$547,517	7.2%	▲35%	▼-7%
United Kingdom	$479,465	6.3%	▼-16%	▼-36%
Germany	$276,963	3.6%	▼-22%	▼-33%
Korea	$197,118	2.6%	▲12%	▲75%
Rest of Americas	$188,797	2.5%	▲4%	▲280%
Japan	$180,609	2.4%	▲2%	▼-46%
Canada	$154,667	2.0%	▼-14%	▲29%
Africa and Middle East	$134,244	1.8%	▲33%	▲166%
Rest of Oceania	$863	0.0%	▼-13%	▼-20%

International Spend — Ranked by Market



Card Spend Trends — by International Markets



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

Accommodation Overview

Mackenzie Region - November 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 November, with total guest nights rising +3% YoY. Occupancy increased (+2%pt. YoY), supported by a contraction in available stay units (-2% YoY).

Commercial Accommodation

Occupancy	Guest Nights	Available Stay Units	Average Stay Length	Guest Arrivals
70%	**75.3K**	**58.2K**	**1.5**	**48.6K**
vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24	vs. Nov '24
↑ 2%pt.	▲ 3%	▼ -2%	▼ -4%	▲ 7%

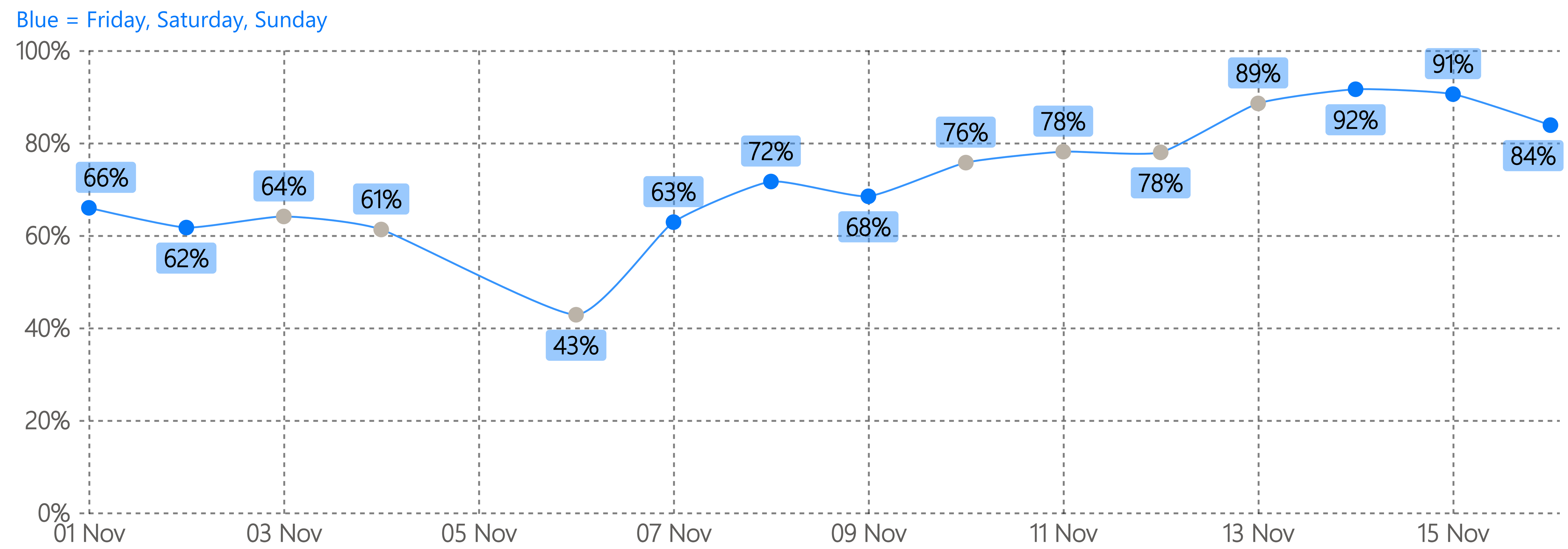
Short-term Rental Accommodation

Occupancy

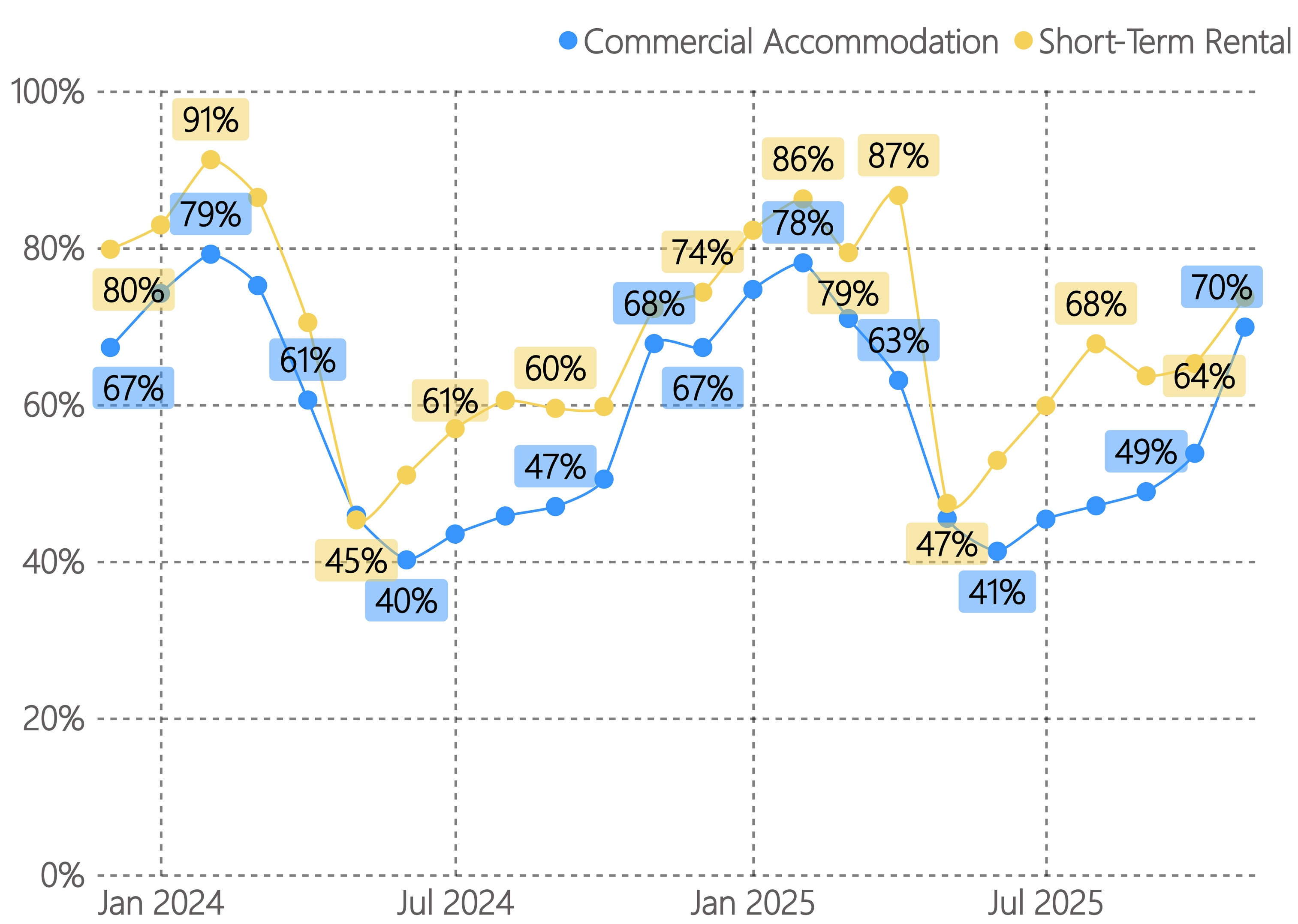
74%

vs. Nov '24

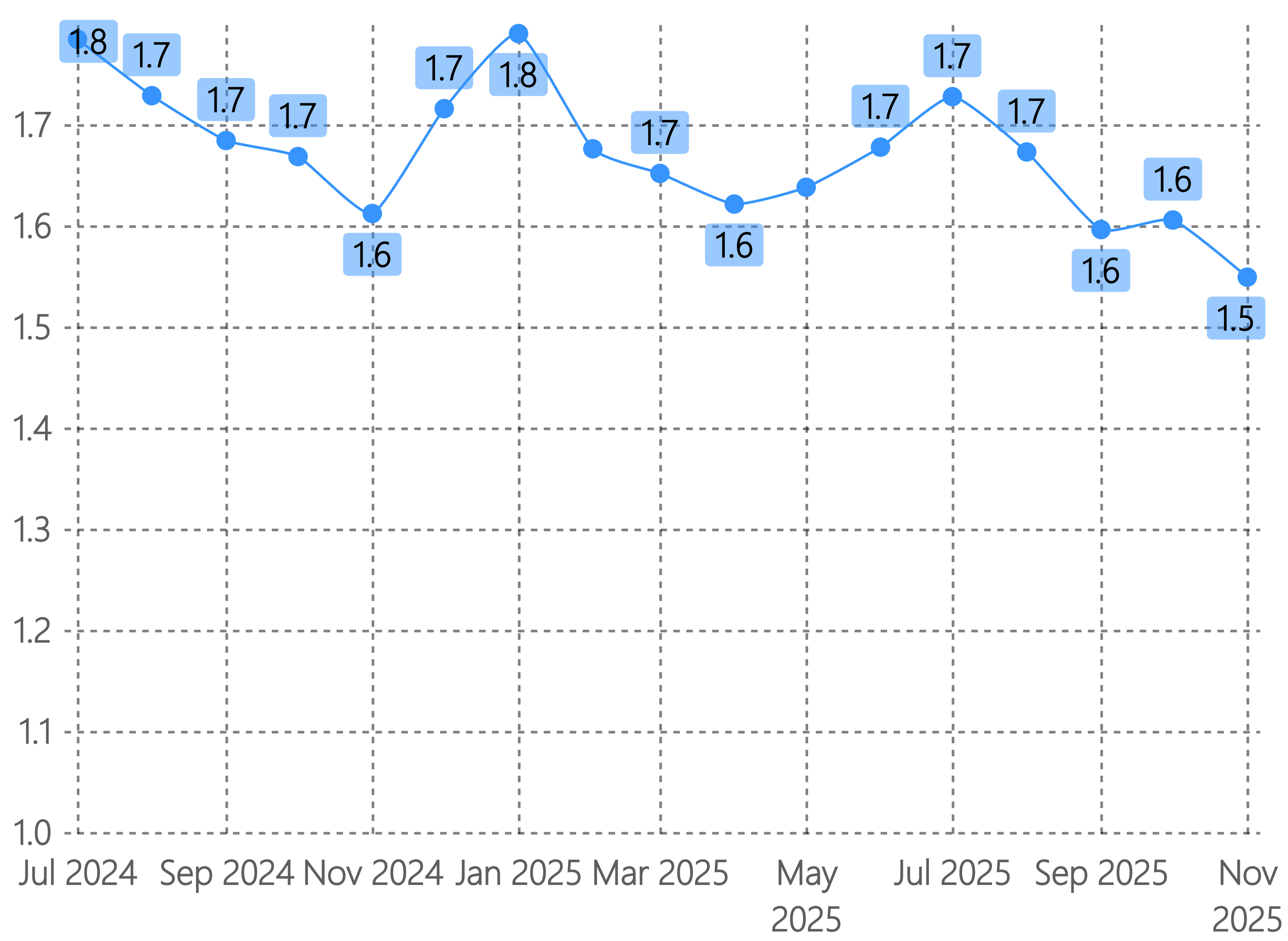
↑ 2%pt.



Occupancy



Average Stay Length in Commercial Accommodation



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Accommodation Overview

Mackenzie Region - November 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.

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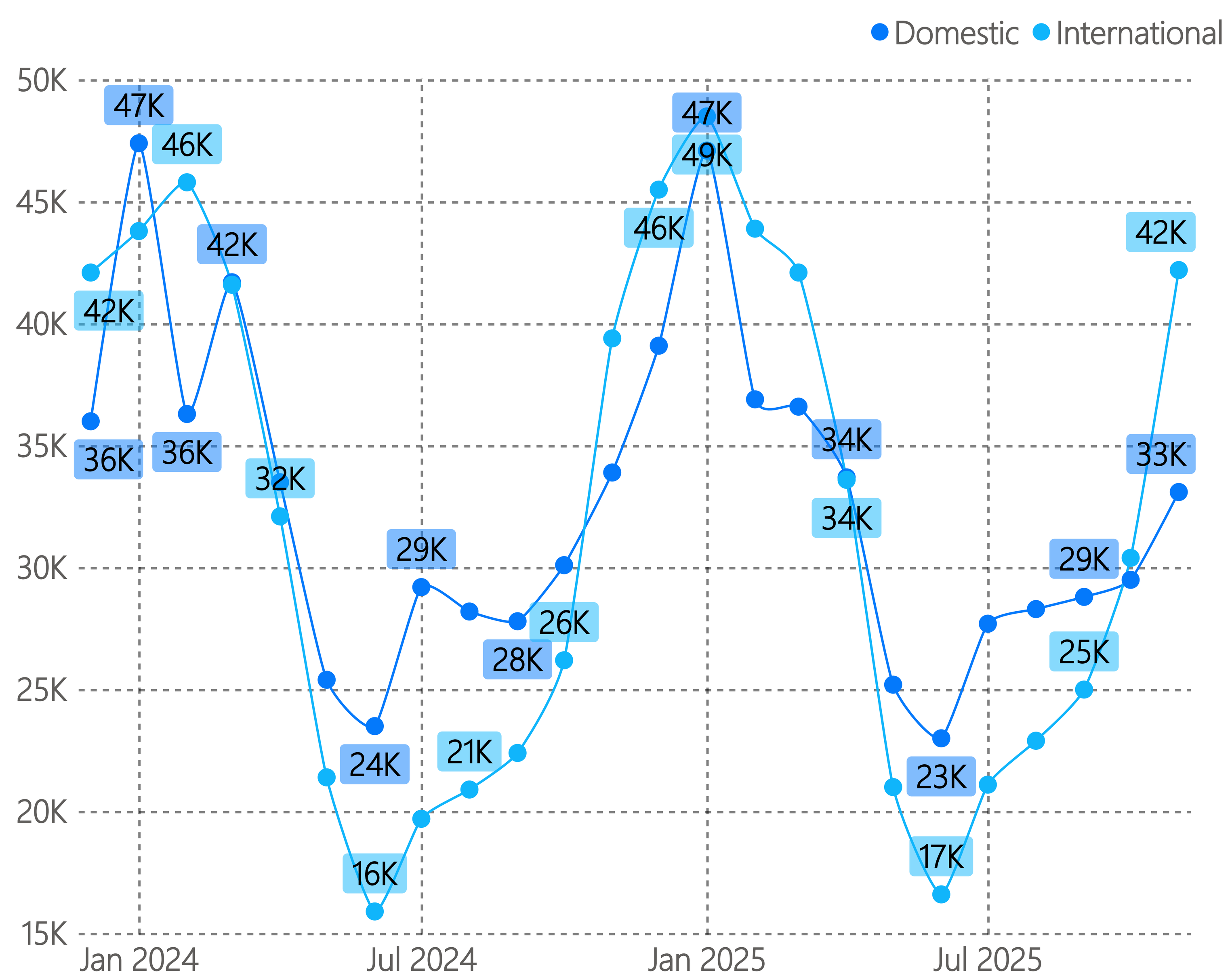
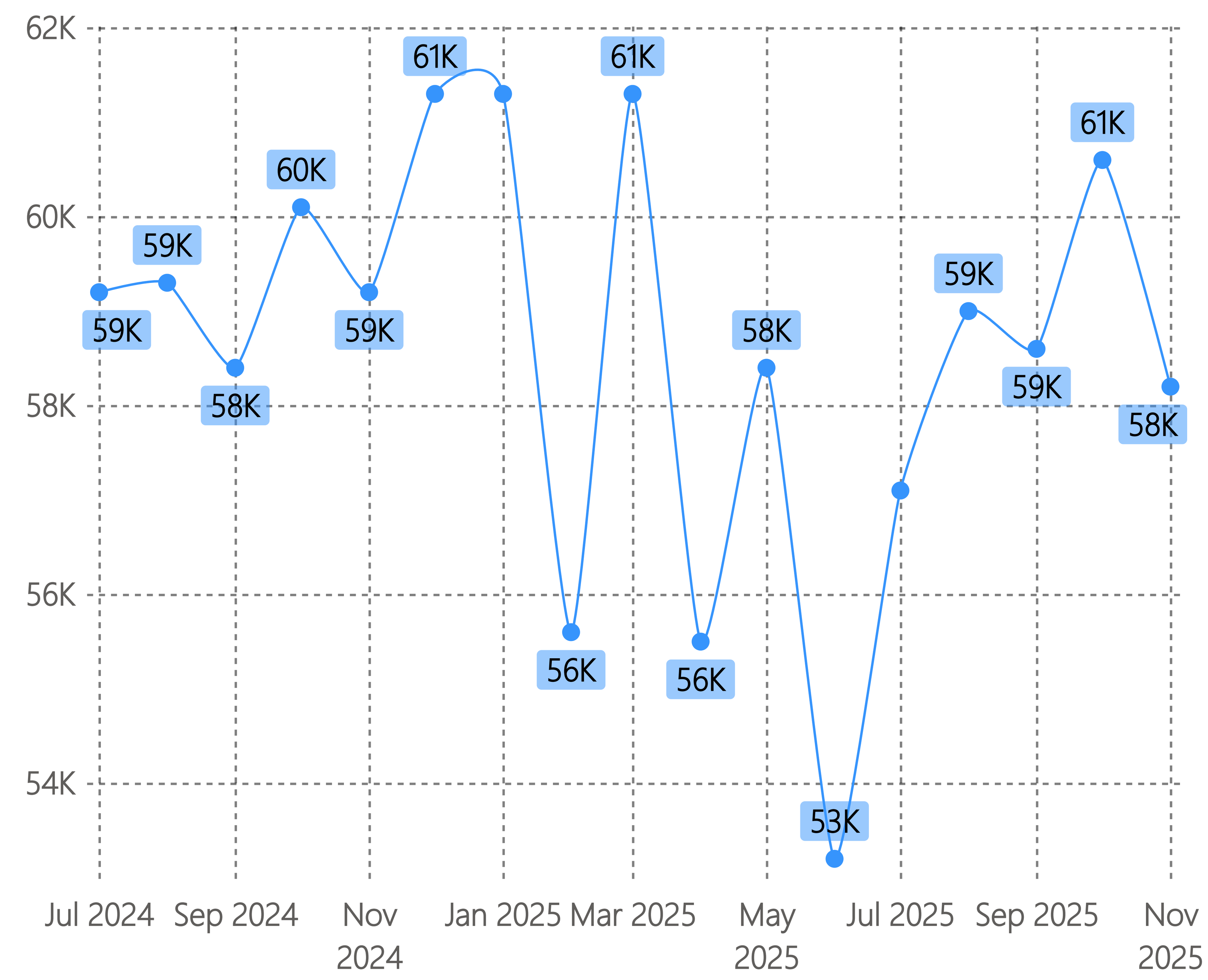
Guest Nights in Commercial Accommodation



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	201K	29.2%	▼-5%	2.4M	28.3%	▲2%
Queenstown	113K	16.4%	▼-4%	1.4M	16.0%	▼-6%
Nelson Tasman	62K	9.0%	▼0%	953K	11.2%	▼-2%
Dunedin	52K	7.5%	▲2%	606K	7.1%	▲2%
West Coast	45K	6.5%	▼-4%	593K	7.0%	▼-3%
Marlborough	40K	5.8%	▲4%	479K	5.6%	▼-2%
Mackenzie	33K	4.8%	▼-2%	389K	4.6%	▼-1%
Wanaka	33K	4.8%	▲0%	494K	5.8%	▼-2%
Timaru	30K	4.3%	▲0%	302K	3.5%	▼-3%
Kaikoura	29K	4.2%	▼-2%	321K	3.8%	▲4%
Waitaki	27K	4.0%	▼-3%	317K	3.7%	▼-3%
Hurunui	23K	3.4%	▼-7%	285K	3.4%	▼-8%
All NZ	2.1M		▼-3%	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
Queenstown	218K	31.9%	▲12%	2.4M	36.0%	▲10%
Canterbury	157K	23.0%	▲14%	1.5M	22.3%	▲8%
West Coast	87K	12.7%	▲36%	702K	10.7%	▲4%
Mackenzie	42K	6.2%	▲7%	393K	6.0%	▲6%
Wanaka	40K	5.8%	▲6%	405K	6.2%	▲12%
Nelson Tasman	37K	5.4%	▲10%	307K	4.7%	▼0%
Dunedin	24K	3.6%	▼-1%	230K	3.5%	▲5%
Kaikoura	22K	3.3%	▲13%	203K	3.1%	▲5%
Marlborough	22K	3.2%	▲8%	188K	2.9%	▼-1%
Waitaki	20K	2.9%	▲27%	164K	2.5%	▲13%
Timaru	7K	1.1%	▼-15%	74K	1.1%	▲2%
Hurunui	7K	1.0%	▲0%	70K	1.1%	▲0%
All NZ	1.5M		▲10%	14.0M		▲6%

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Accommodation by Type

Mackenzie Region - November 2025

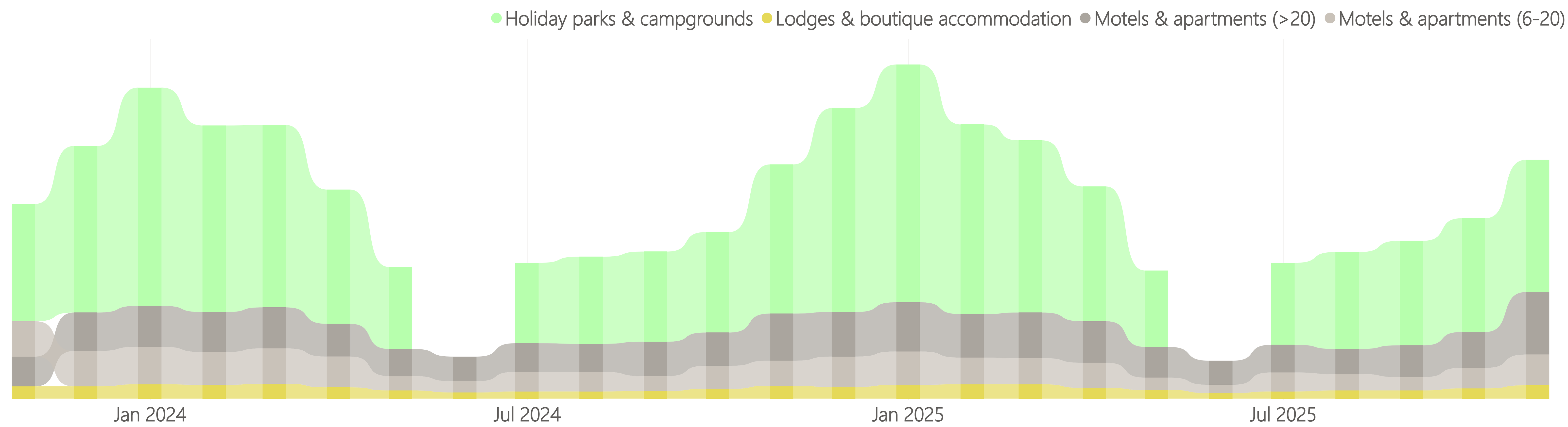
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights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

> Segmenting by accommodation type, motels and apartments (20+ units) recorded substantial growth in total guest nights (+32% YoY), driven by a surge in international demand (+51% YoY) and strong domestic performance too (+17% YoY). Smaller motels and apartments (6-20 units) followed a similar trajectory, growing (+25% YoY) on the back of a +53% YoY jump in international guest nights.

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	19,200	58.2%	▼-9%	25,800	55.5%	▼-12%	1.3	▼-2%	23,600	▼-7%	0.50	↓ -3%pt.
Motels & apartments (>20)	7,600	23.0%	▲65%	12,100	26.0%	▲32%	1.6	▼-20%	5,900	▲2%	0.91	↑ 11%pt.
Motels & apartments (6-20)	4,800	14.5%	▲71%	6,000	12.9%	▲25%	1.3	▼-29%	3,200	▲14%	0.95	↑ 4%pt.
Lodges & boutique accommodation	1,400	4.2%	▲8%	2,600	5.6%	▲4%	1.9	▼-3%	2,200	▲10%	0.60	↓ -2%pt.
Backpackers			-			-		-		-		
Hotels			-			-		-		-		
Total	48,600		▲7%	75,300		▲3%	1.5	▼-4%	58,200	▼-2%	0.70	↑ 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	8,900	44.7%	▼-21%	16,900	63.5%	▼-6%	25,800	55.5%	▼-12%
Motels & apartments (>20)	6,200	31.2%	▲17%	5,900	22.2%	▲51%	12,100	26.0%	▲32%
Motels & apartments (6-20)	3,700	18.6%	▲12%	2,300	8.6%	▲53%	6,000	12.9%	▲25%
Lodges & boutique accommodation	1,100	5.5%	▲0%	1,500	5.6%	▲7%	2,600	5.6%	▲4%
Backpackers			-			-			-
Hotels			-			-			-
Total	33,100		▼-2%	42,200		▲7%	75,300		▲3%

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

Accommodation by Type

Mackenzie Region - November 2025

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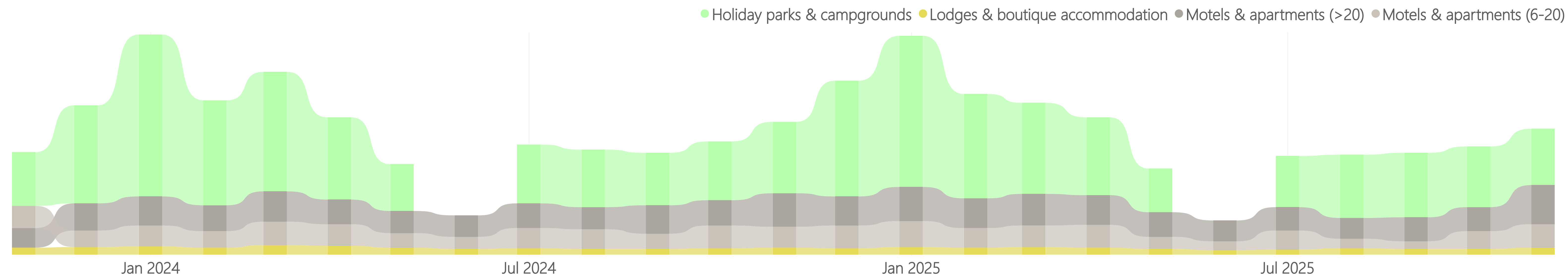
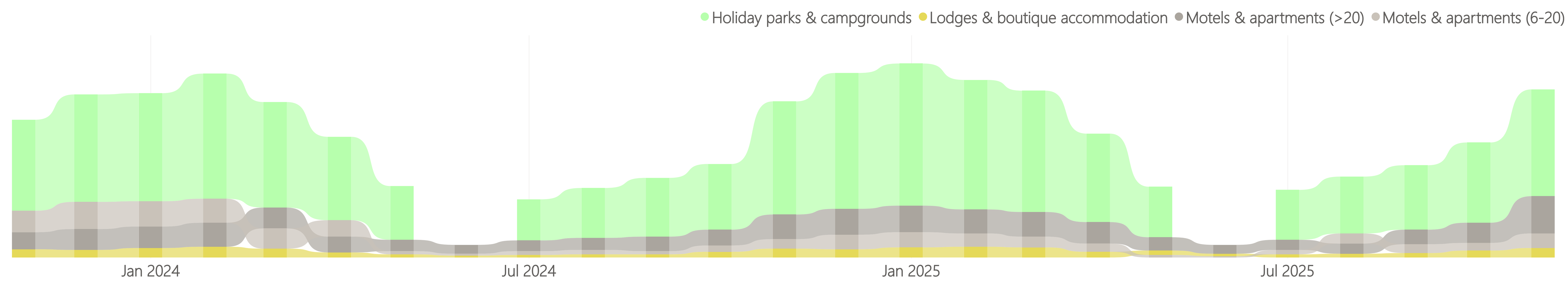
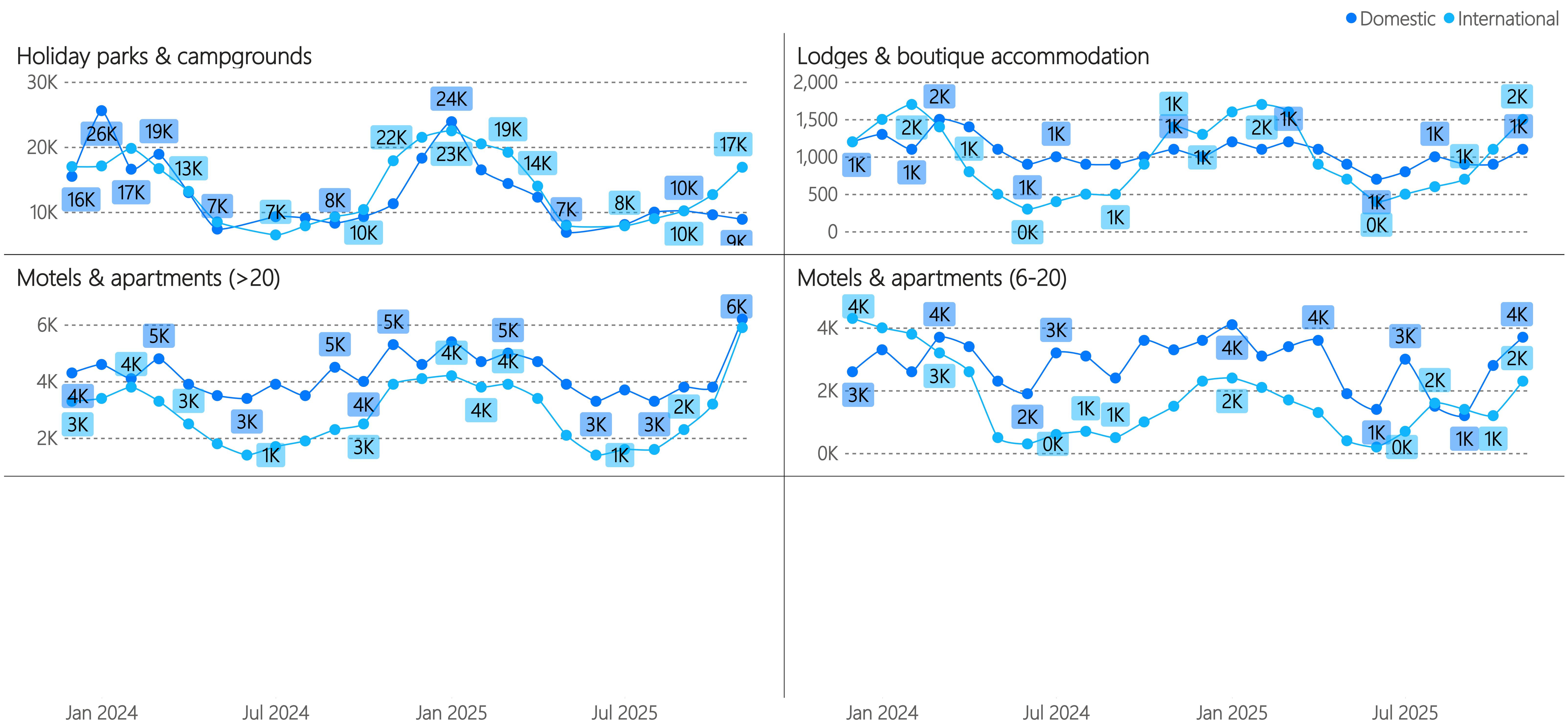
Domestic Guest Nights — Ranked by Accommodation Type



International Guest Nights — Ranked by Accommodation Type



Guest Nights — Trends by Market



Employment Overview

Mackenzie Region - November 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 grew by +3% YoY in November, outperforming the national average (0% YoY) and neighbouring region Timaru (-1% YoY). The region's largest tourism-related employment industry, accommodation (42% of filled jobs), remained flat (0% YoY), as did travel and tour services and air passenger transport services.

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	720		▲3%	$3.359M		▲8%
Accommodation	300	41.7%	▲0%	$1.382M	41.1%	▼-3%
Food and Beverage Services	220	30.6%	▲5%	$0.888M	26.4%	▲12%
Travel and Tour Services	70	9.7%	▲0%	$0.386M	11.5%	▲19%
Activity Services	60	8.3%	-			-
Recreation Services	30	4.2%	▼-14%	$0.142M	4.2%	▲5%
Air Passenger Transport Services	20	2.8%	▲0%	$0.131M	3.9%	▼-6%
Confidentiality Residual	20	2.8%	▼-69%	$0.43M	12.8%	▲43%
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	28,680	74.0%	▲2%		74.3%	▲2%
Marlborough	3,170	8.2%	▲3%		8.0%	▲1%
West Coast	2,210	5.7%	▲4%		5.6%	▲0%
Timaru	1,770	4.6%	▼-1%		4.6%	▼-2%
Waitaki	1,010	2.6%	▲5%		2.6%	▲3%
Hurunui	830	2.1%	▲0%		2.1%	▼-1%
Mackenzie	720	1.9%	▲3%		1.8%	▼-1%
Kaikoura	380	1.0%	▲3%		1.0%	▲1%
All NZ	497,035		▲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	$124M	76.9%	▲3%	$1.6B	77.3%	▲5%
Marlborough	$11.7M	7.2%	▲1%	$145M	7.1%	▼-3%
West Coast	$8.3M	5.1%	▲5%	$104M	5.1%	▲3%
Timaru	$6.0M	3.7%	▲6%	$74.9M	3.7%	▲5%
Mackenzie	$3.4M	2.1%	▲8%	$40.1M	2.0%	▲4%
Hurunui	$3.3M	2.1%	▲3%	$42.2M	2.1%	▲4%
Waitaki	$3.2M	2.0%	▲6%	$40.3M	2.0%	▲5%
Kaikoura	$1.5M	0.9%	▼-2%	$19.0M	0.9%	▲6%
All NZ	$2.1B		▲3%	$26.8B		▲4%

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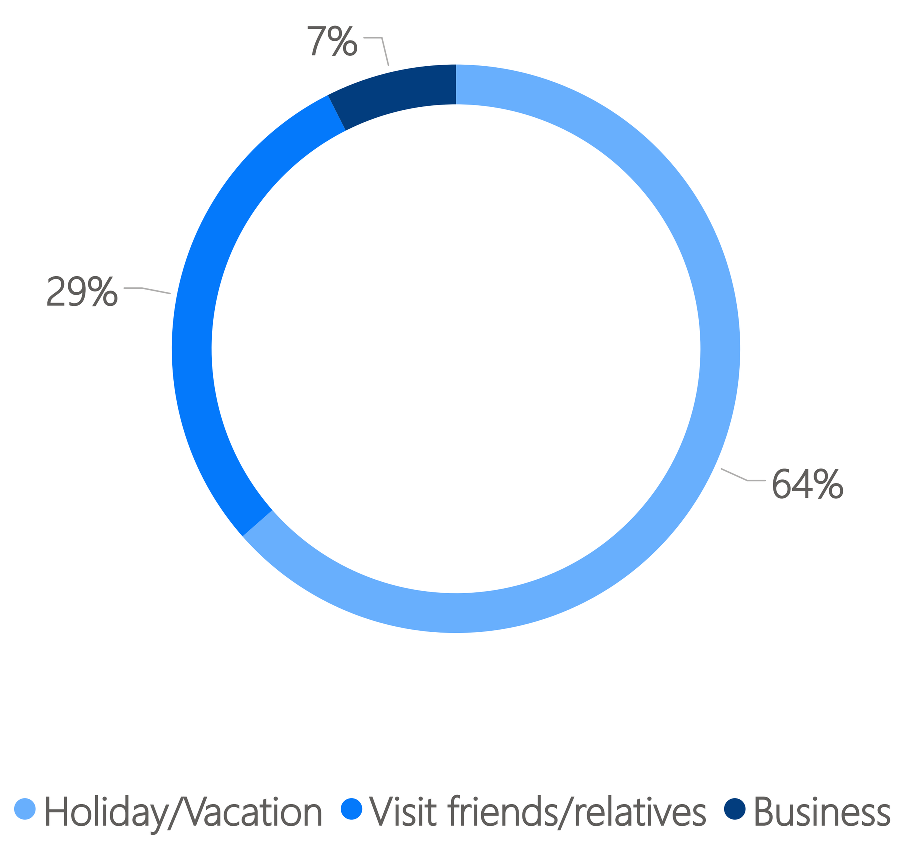
Visitor Arrivals

New Zealand - November 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

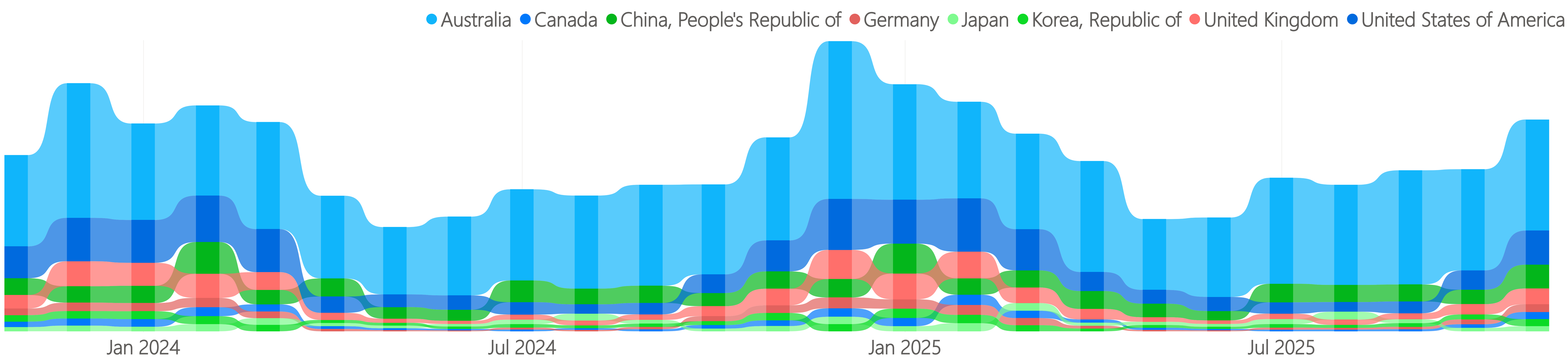
Arrivals by Travel Purpose



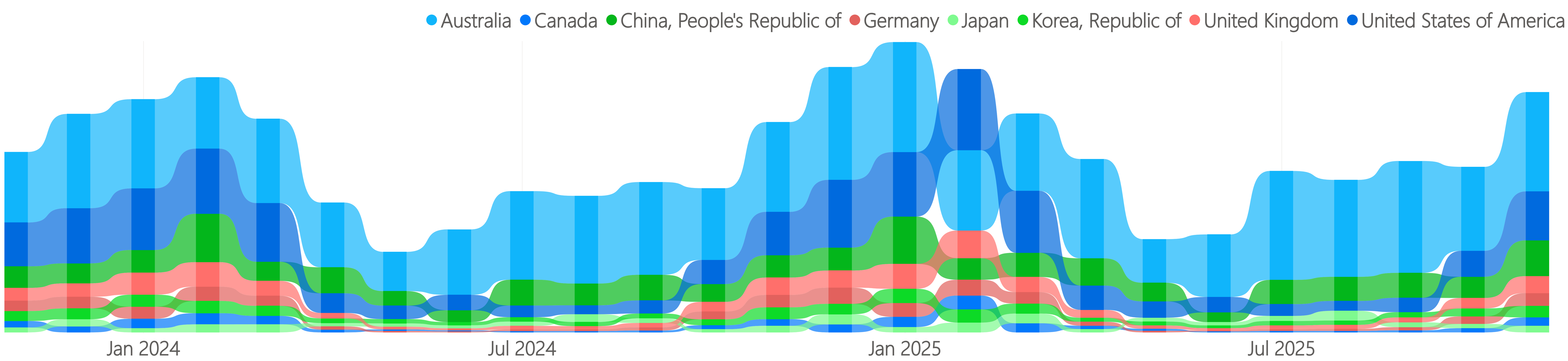
International Visitor Arrivals by Port

Total	AKL	CHC	ZQN	WLG
348K	228K	56.4K	39.6K	15.6K
vs. Nov '24 ▲8%	vs. Nov '24 ▲2%	vs. Nov '24 ▲22%	vs. Nov '24 ▲20%	vs. Nov '24 ▲4%
vs. Nov '19 ▼-7%	vs. Nov '19 ▼-14%	vs. Nov '19 ▲1%	vs. Nov '19 ▲52%	vs. Nov '19 ▼-22%

Visitor Arrivals by International Market



Vacation Traveller Arrivals by International Market



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