

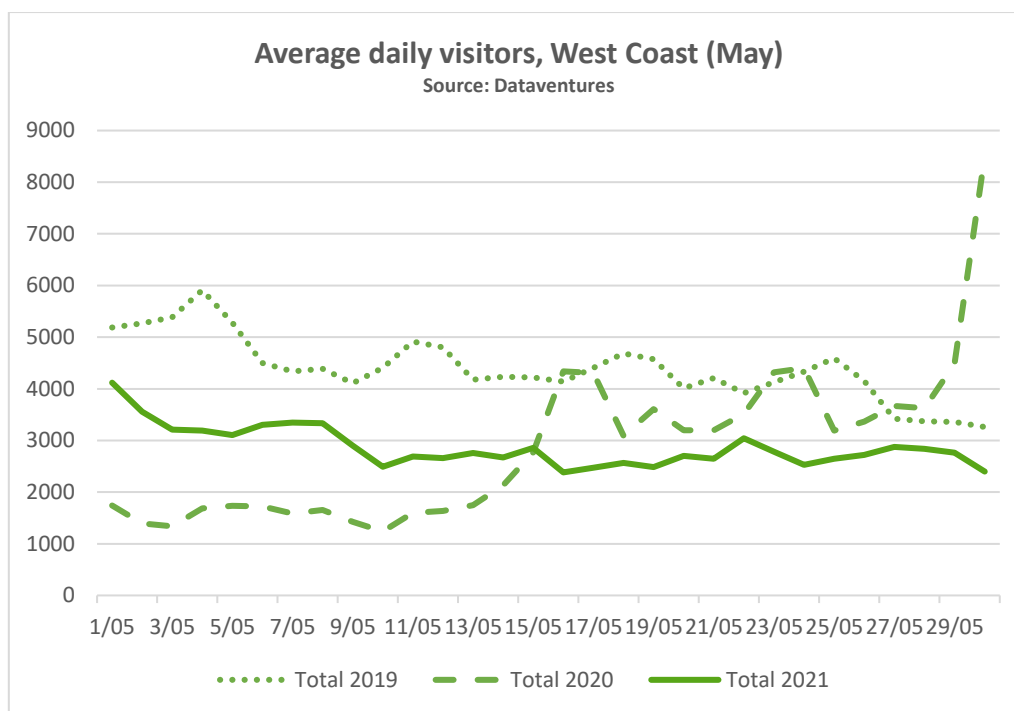
West Coast Visitor Trends May 2021

Key figures May 2021

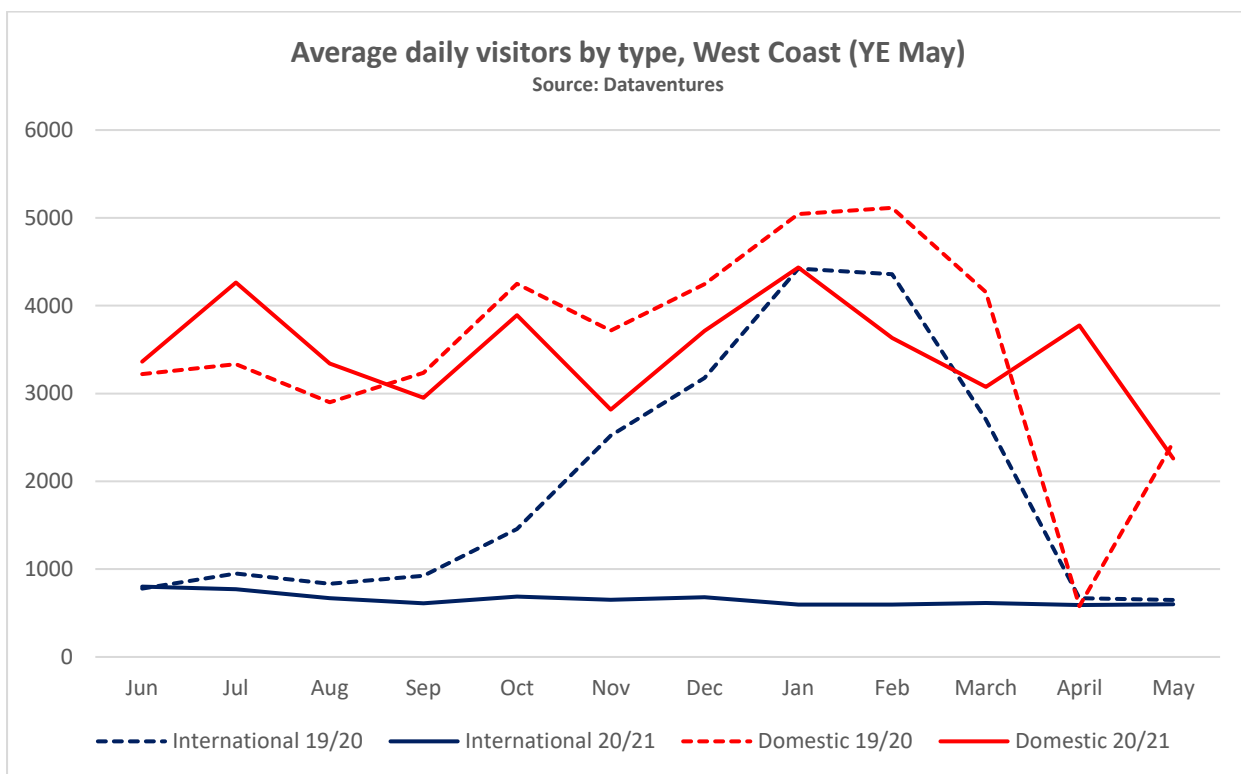
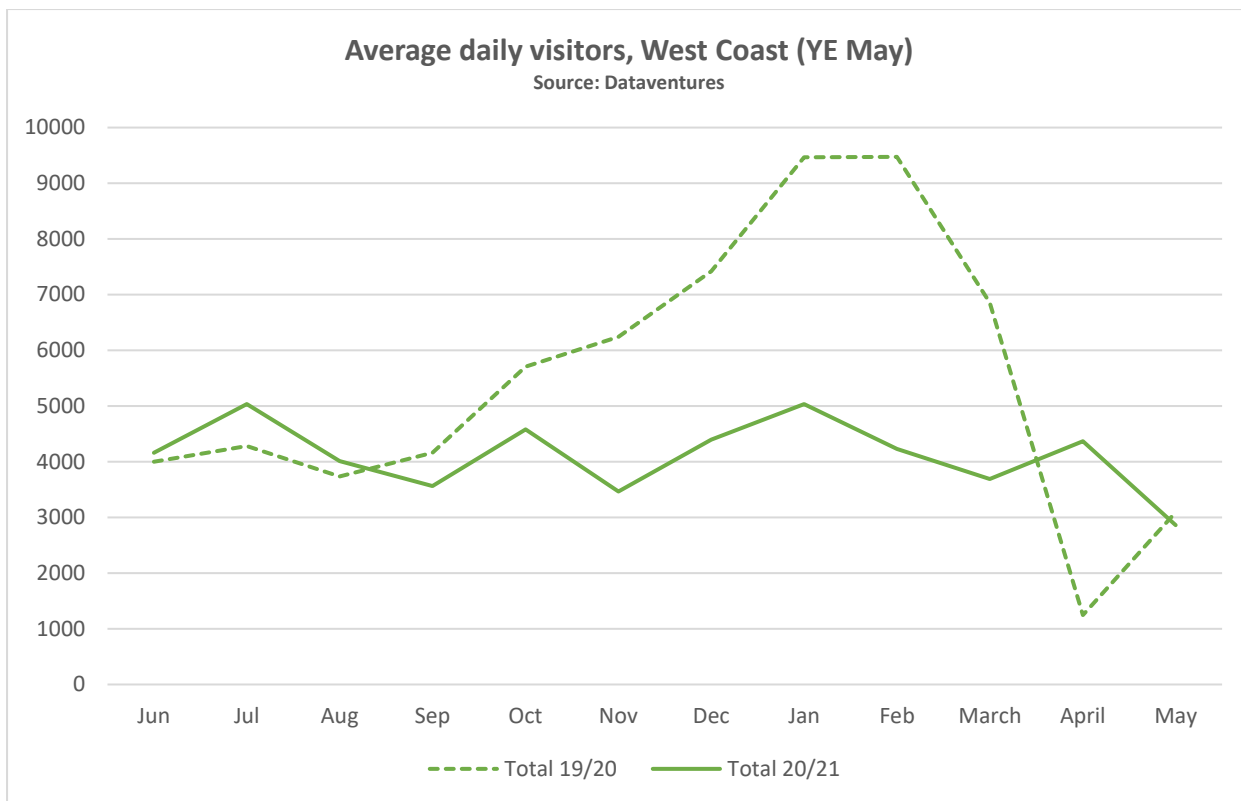
Average daily visitors: 2,861
 Monthly ECT visitor spend: \$9.6m
 Average daily spend: \$308.5k
 Average daily spend per visitor: \$107.83
 Average length of stay: 1.5%
 Accommodation occupancy rate: 23%
 Airbnb occupancy rate: 37%

Average daily visitors

Dataventures figures capture the average number of visitors in a region each day at midday. An average of 2,861 visitors were in the West Coast region per day in May 2021. This was -35% less than in May 2019, and -7% less than in May 2020. Domestic visitor numbers were down -35% from May 2019 and -7% from May 2020.



Daily visitor numbers for the YE May 2021 averaged at 4,116 visitors each day. This was a reduction of -25% or 1357 average daily visitors compared to the previous 12-month period. Average daily domestic visitors fell by -2% from 3,520 to 3,460 while international visitor numbers fell by -66% from 1,954 to 656 compared to the YE May 2020.



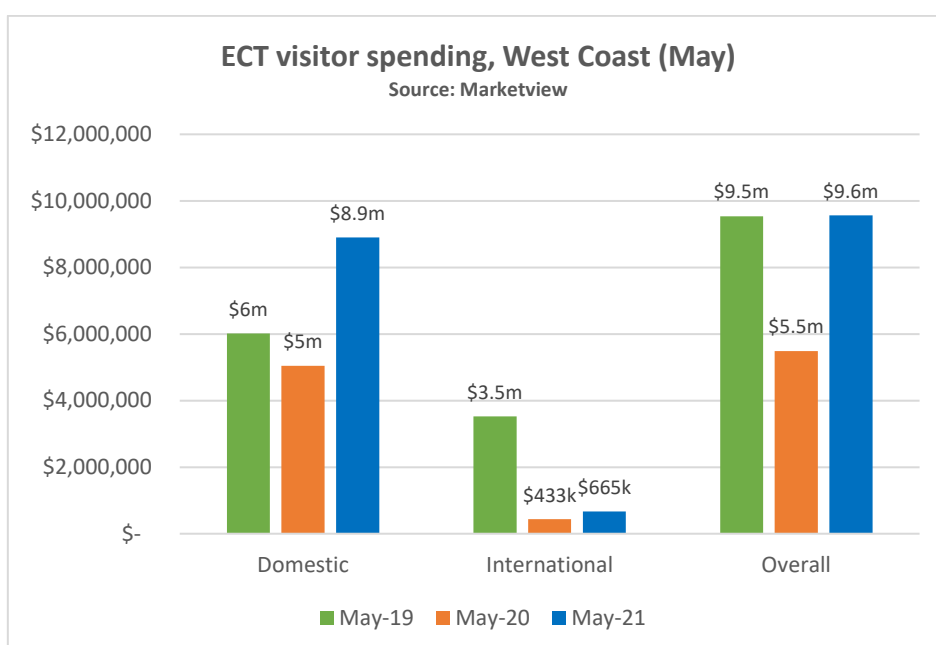
Visitor Spending

Visitor spending data is sourced from MarketView, which captures **electronic card transaction (ECT)** data on the Paymark network. This does not include cash spending or online pre-purchases. This should be treated as an indicator of trends in ECT spending only, and not as a proxy for total tourism spending.

Please note that the first two weeks of May 2020 were spent in COVID Alert Level 3, with the remaining two weeks spent in COVID Alert Level 2. This placed restrictions on consumer activity and as a result spending growth figures comparing to May 2020 are artificially high.

Monthly ECT visitor spending in the West Coast RTO region in May 2021 was \$9.6m, up 0.2% or \$23k from May 2019 and up 74% or \$4.1m from May 2020. ECT spending by domestic visitors made up \$8.9m of this, up 48% or \$2.9m on May 2019 and up 76% or \$3.5m on May 2020. International ECT visitor spend for the month was \$665k, down -81% or \$2.9m on May 2019.

Spending in Westland District made up \$3.4m or 36% of the regions monthly ECT visitor spend, followed by Grey District at \$3.09m or 32% and Buller District at \$3.07m or 32% of regional spend.



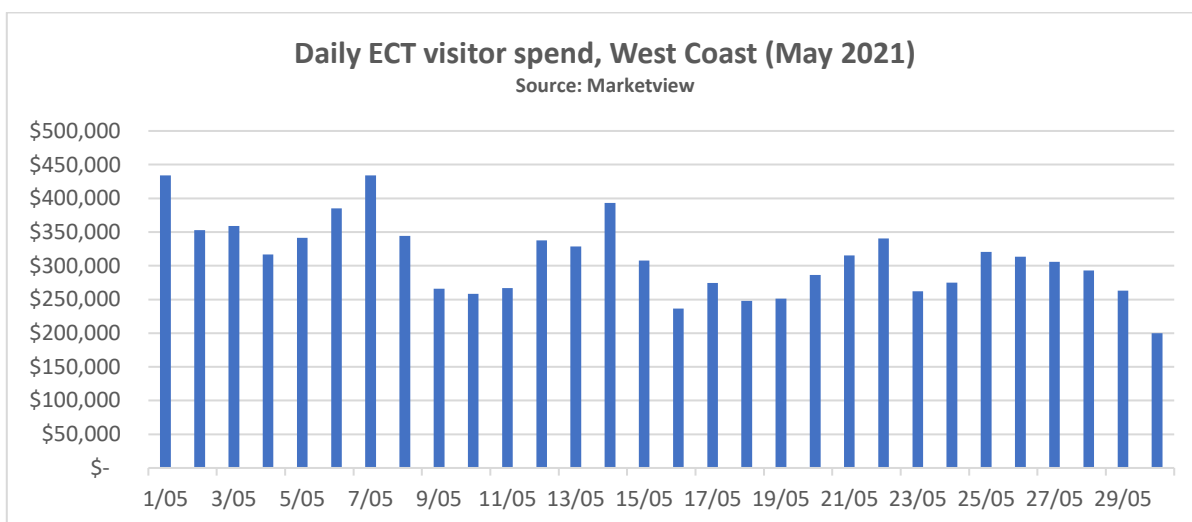
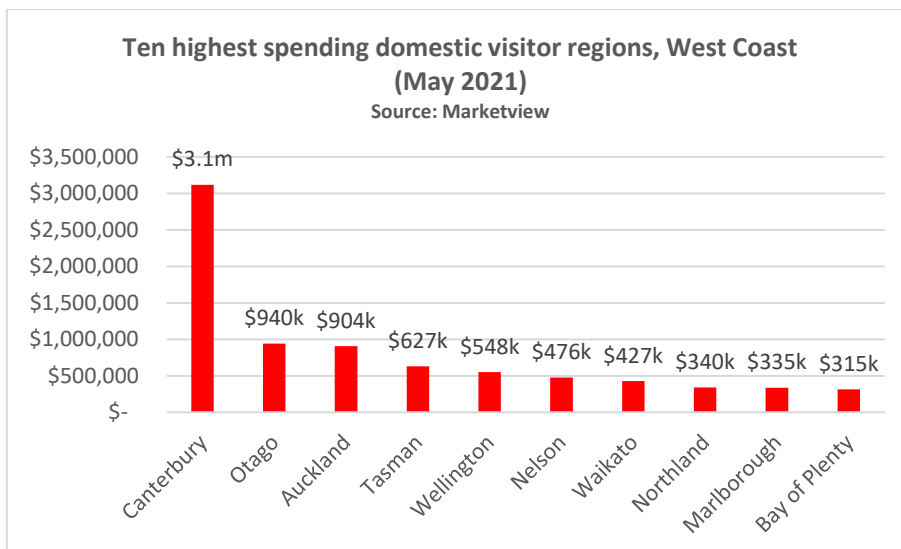
When looking at monthly ECT visitor spending ranked by share of nationwide spend, Development West Coast sat at 19th out of 36 RTOs with 1.1% of the total market.

When comparing average ECT transaction values by RTO, Development West Coast was 12th out of 36 with an average transaction value of \$50.88. The average ECT transaction value across all RTOs was \$50.80.

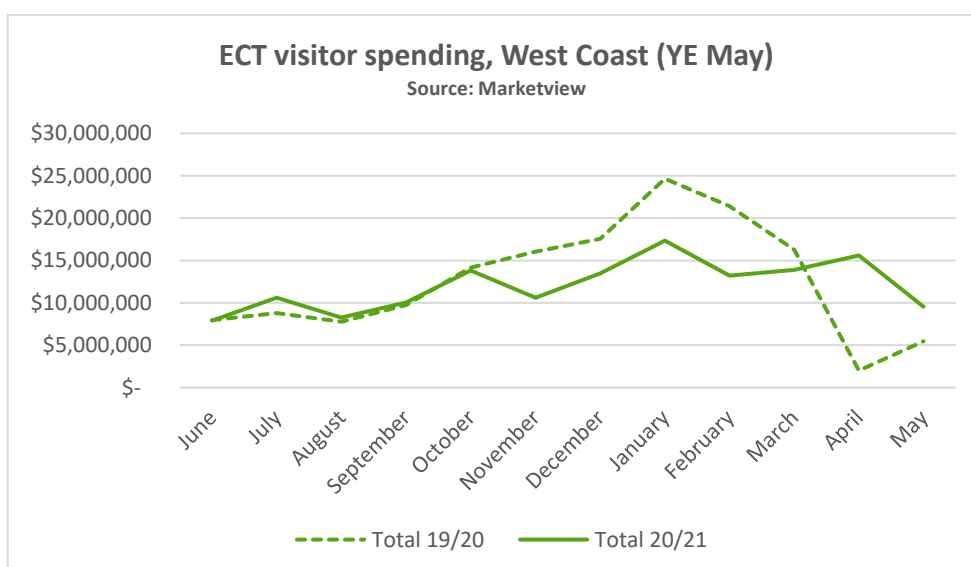
Average daily ECT visitor spending for May 2021 was \$308,493. Combining this with Dataventures average daily visitor numbers produces an estimated average daily ECT spend per visitor of \$107.83.

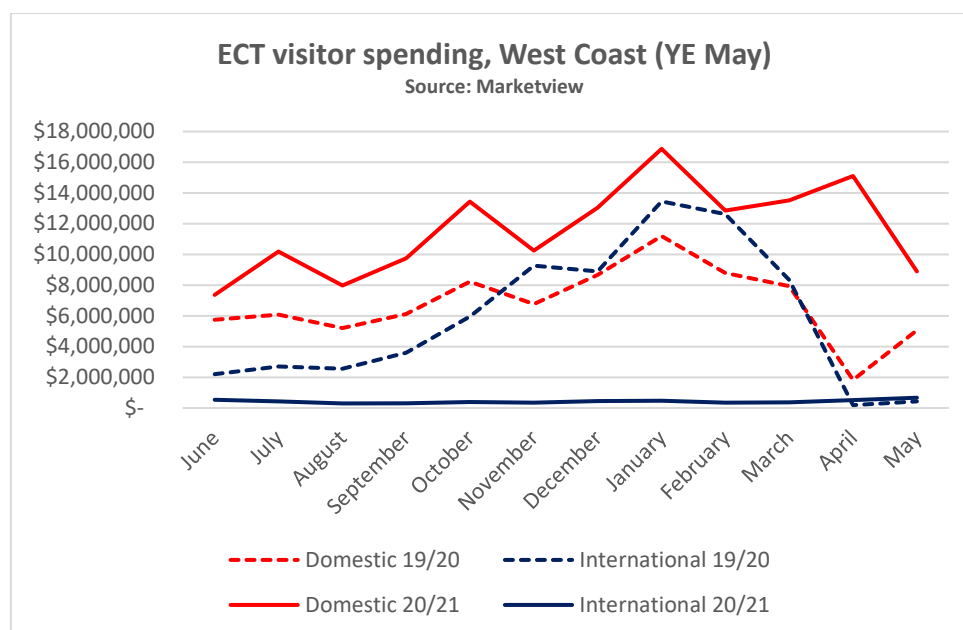
Daily ECT visitor spending was highest on Saturday the 1st of May at \$434,097.

Visitors from Canterbury made up the largest share of ECT visitor spending in the West Coast in May 2021 at 35% of domestic visitor spending, followed by visitors from Otago (11%); Auckland (10%); Tasman (7%) and Wellington (6%).



ECT visitor spending for the YE May 2021 was \$144.3m, down -5% or -\$7.4m from that of the YE May 2020. Domestic ECT visitor spending for the YE May 2021 was \$139.2m, up 71% or \$57.7m compared to the 12-month previous period. ECT spending by international visitors was \$5.1m, down -93% or \$65.1m on the YE May 2020.

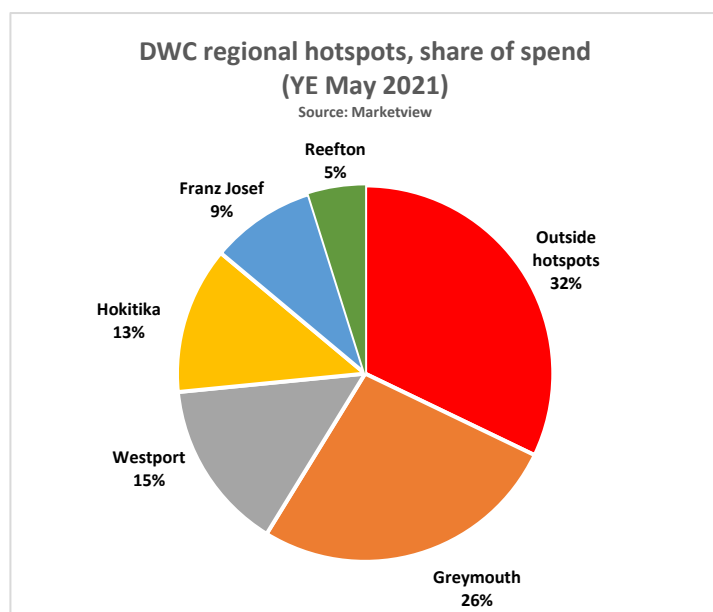


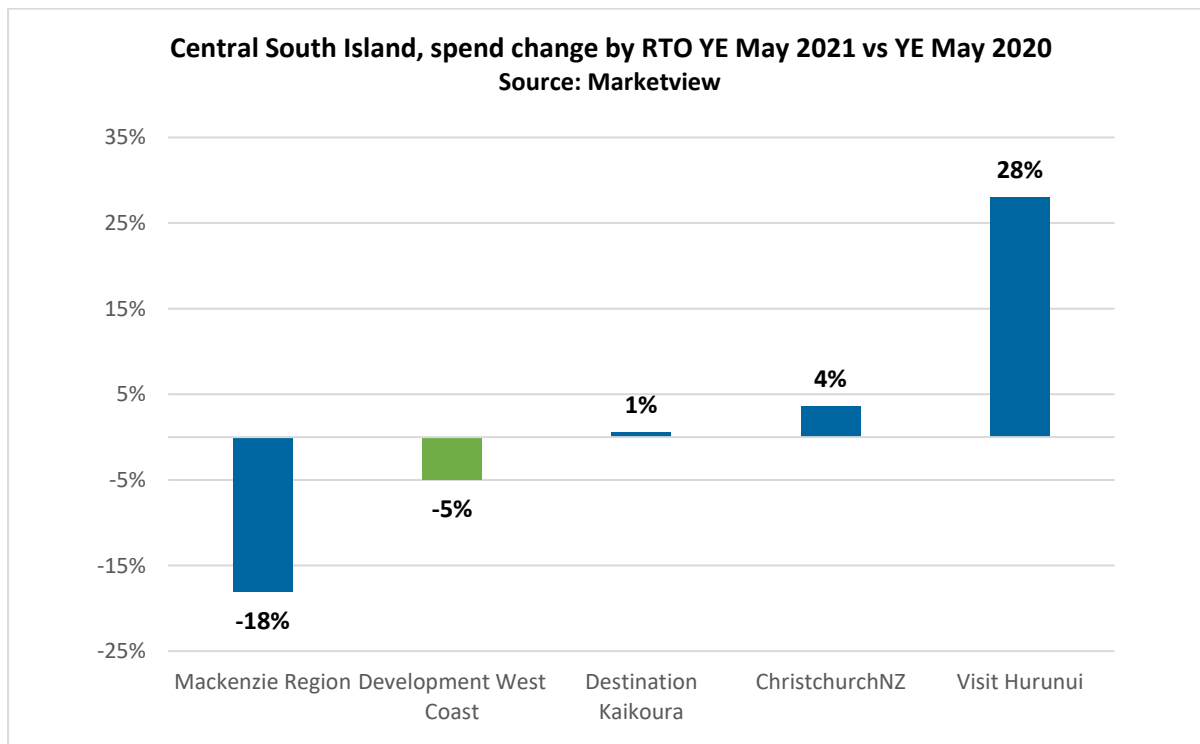
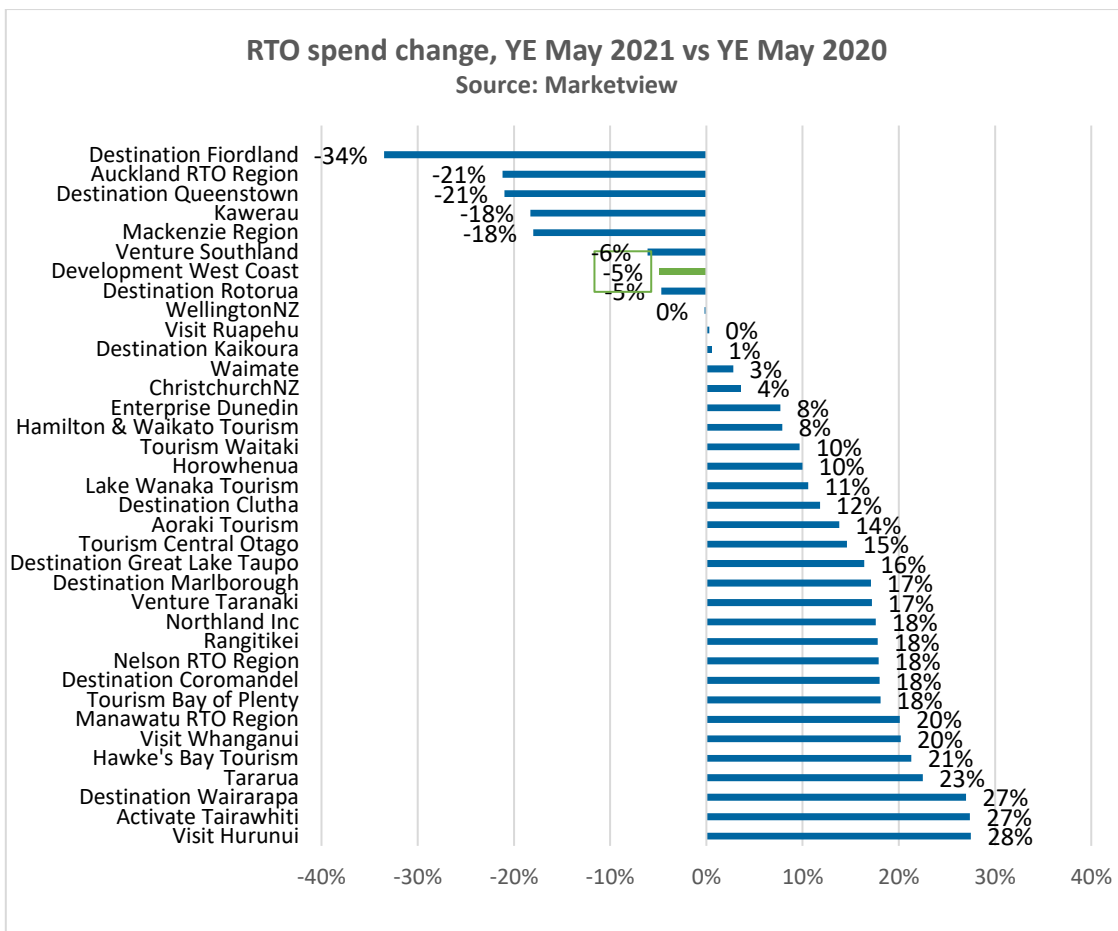


Regional hotspots

The below table shows monthly and yearly spend figures for hotspot locations within the West Coast region. Spending within these hotspots made up **68%** of ECT visitor spending in the West Coast RTO area in the YE May 2021.

Hotspot	May 2021 spend	Change from May 2019	YE May 2021 spend	Change from YE May 2020
Westport	\$1.5m	+53%	\$21m	+26%
Reefton	\$512k	+50%	\$7.2m	+47%
Greymouth	\$2.8m	+10%	\$38.2m	+12%
Hokitika	\$1.2m	+20%	\$18m	+9%
Franz Josef	\$742k	-47%	\$13.06m	-45%





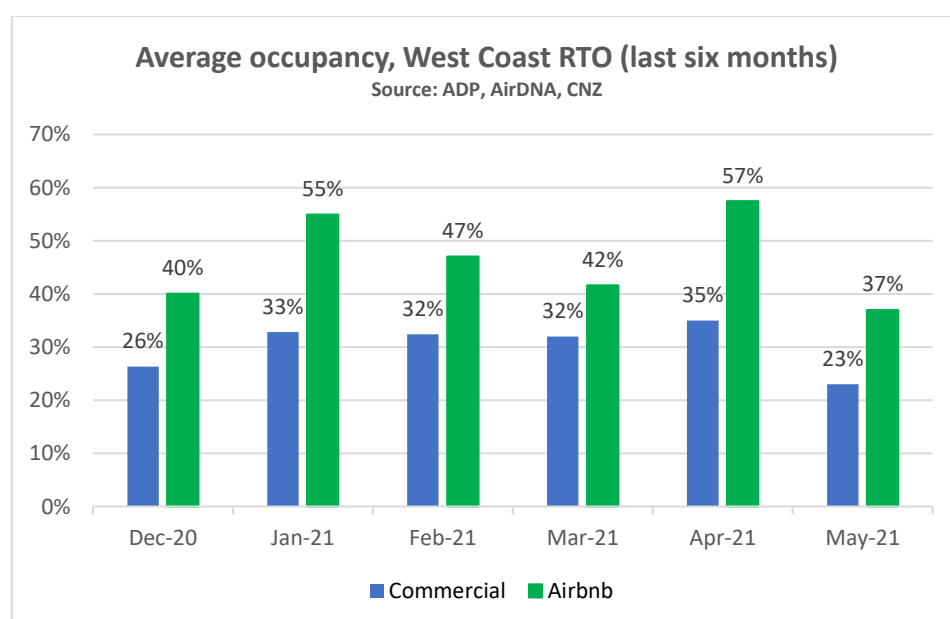
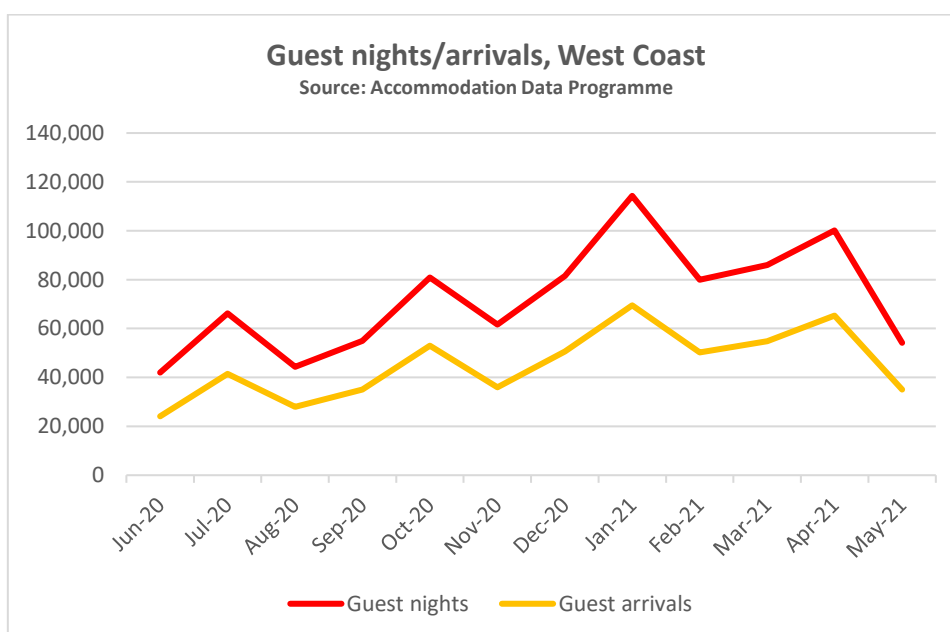
Accommodation

Commercial

35,000 recorded guest arrivals spent 54,200 guest nights in commercial accommodation in the West Coast RTO area in May 2021. Of these guest nights, 49% were spent in the Westland District, 27% in Buller District and 24% in Grey District. Guest nights spent on the West Coast made up 2.6% of total guest nights in NZ for the month.

143 accommodation providers on the West Coast were registered on the ADP in May 2021, with 129 of these identified as 'active' (a reduction of 5 since the previous month).

The average occupancy rate was 23%, below the national average of 39%. Occupancy in Grey District was 28%, followed by Buller District at 23% and Westland District at 21%. The average length of stay was 1.5 nights, below the national average of 2.1 nights.



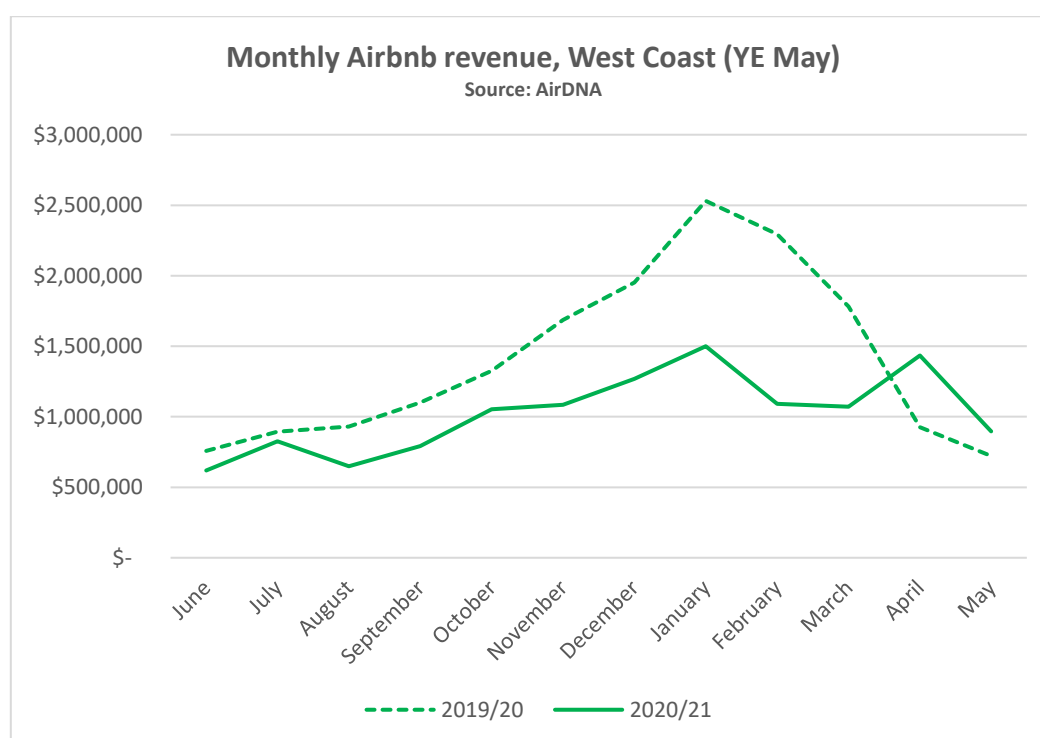
Airbnb

A total of 625 active rentals in the West Coast region were listed on Airbnb in May 2021, a decrease of 28 since the previous month. Of these, 44% were in Westland District, 35% in Buller District and 20% in Grey District. The average Airbnb occupancy rate in the region in May 2021 was 37%.

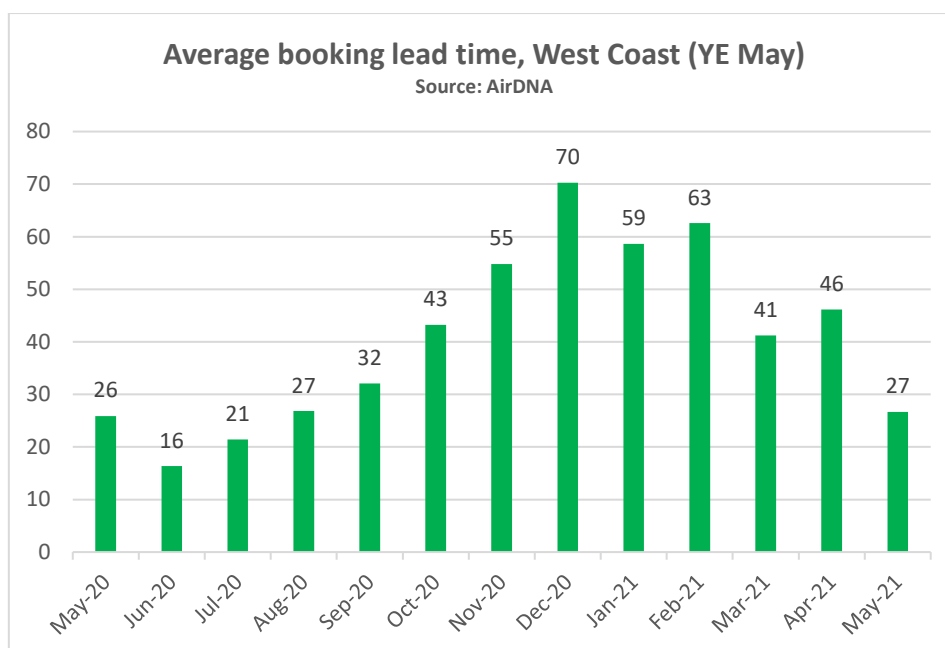
Average daily rates by listing type are listed below. Percentages show the change in ADR in May 2021 from April 2021 (if any).

Average daily rates by listing type, West Coast Airbnb (April 2021)				
District	Entire home		Private room	Shared room
Westland District	\$152	-4%	\$141	\$35 -10%
Buller District	\$159	+1%	\$97	N/A
Grey District	\$137	+4%	\$97	N/A

Airbnb revenue for the month totaled at \$897k in the West coast region, up 13% from May 2019 and up 24% from May 2020.



The average booking lead time for West Coast Airbnb listings booked for May 2021 was 27 days. This was on par with the average booking lead time in May 2020, which was 26 days. Booking lead times were longest for listings in the Buller District at 32 days; followed by 25 days in Westland District and 21 days in Grey District.



Triptech

Triptech is a travel technology company that generates data from users of apps for car hire companies, accommodation, and RV hire companies, including CamperMate. Triptech data captures the movements of a proportion of the visitor population (e.g. a proportion of visitors tending to use campervans and rental cars), and should not be treated as a representation of the entire visitor population.

Visitor Movements- Prior & Next Regions

Prior and next regions show the RTO areas that Triptech users who visited the West Coast in May 2021 were 'pinged' in immediately before and after visiting. This provides insight into direction of travel and patterns in visitor movements. The below tables show the top regions that users were 'pinged' in during the month of May before or after visiting the West Coast region.

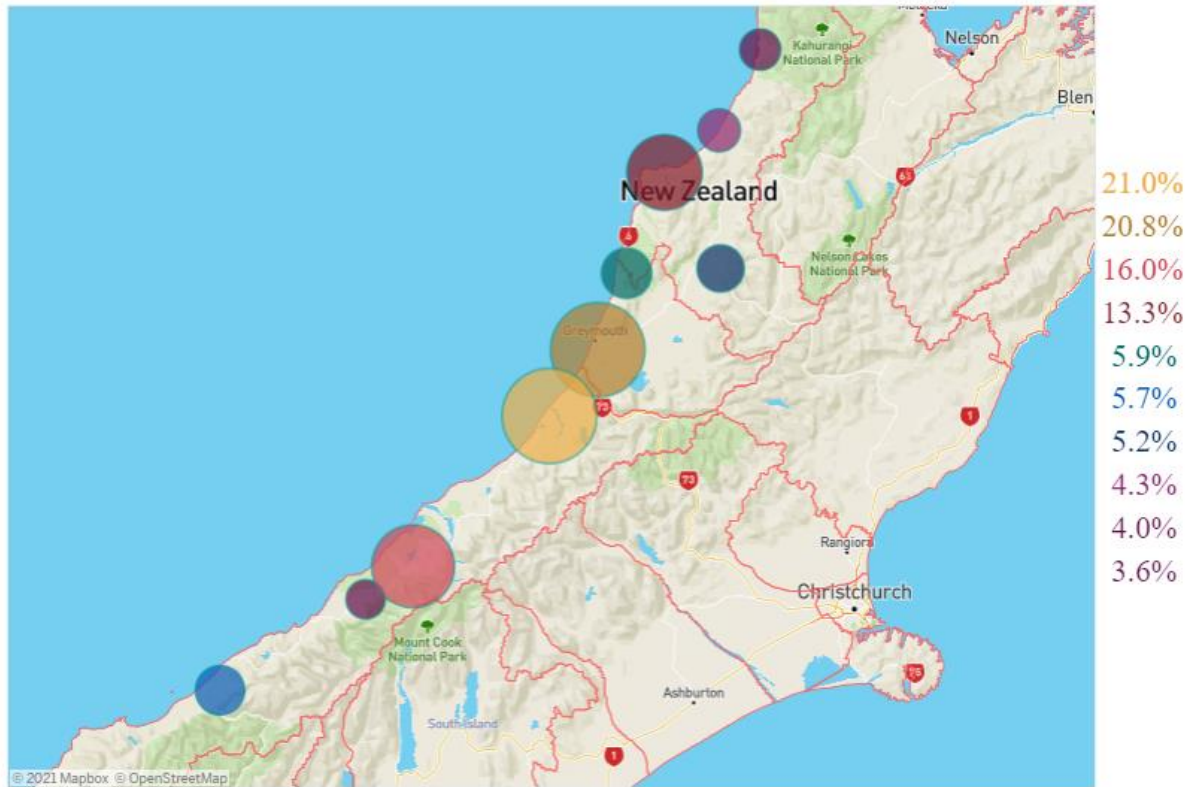
Top 'prior' regions- West Coast May 2021	
Christchurch	39%
Nelson Tasman	25%
Wanaka	24%
Queenstown	3%

Top 'next' regions- West Coast May 2021	
Christchurch	35%
Nelson Tasman	31%
Wanaka	24%
Marlborough	2%
Queenstown	2%

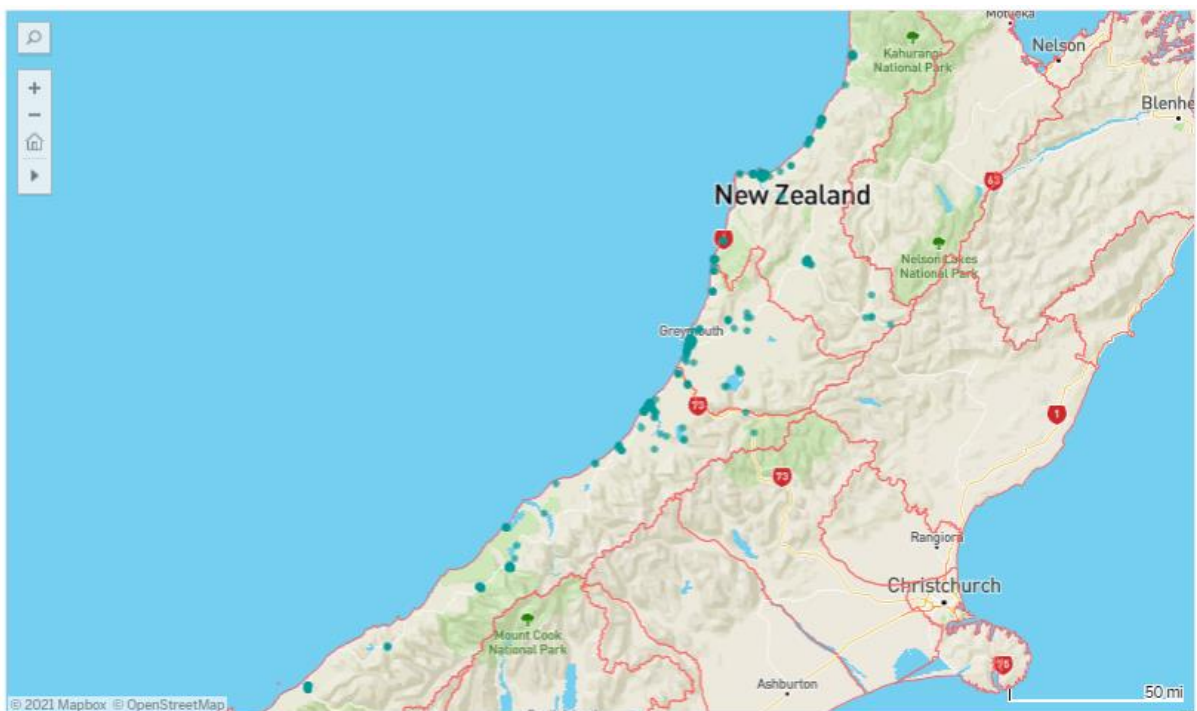
Overnight stay locations

The below map shows popular overnight stay locations for users in May 2021. Clusters were detected at the following locations: Hokitika (21%); Greymouth (21%); Franz Josef (16%); Punakaiki (6%); Haast (6%); Reefton (5%); Hector (4%); Karamea (4%); Fox Glacier (4%).

Overnight Stay Clusters

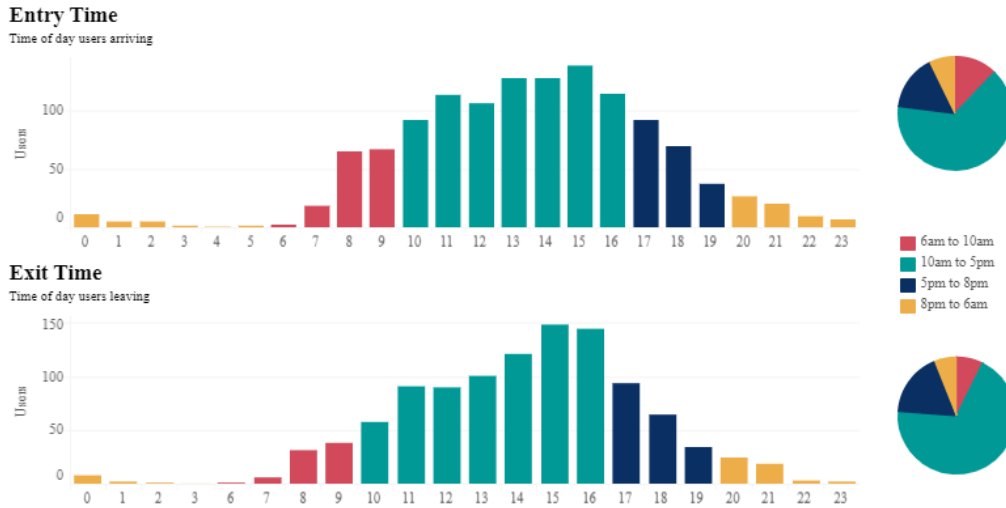


The below map shows the location of all overnight stays by Triptech users in May 2021.



Entry & exit times

Triptech users visiting the West Coast in May 2021 most commonly entered the region between the hours of 11am-5pm, with entry numbers peaking from 1-4pm, most significantly at 3-4pm. Users tended to exit later in the day, with the number of users leaving the region steadily increasing throughout the day before peaking at 3-5pm.



Active search times

The below chart shows the time of day that Triptech users in the West Coast in May 2021 were searching for information on partner apps. Overall searches peaked later in the day than previous months and were highest between 2-6pm, with another earlier peak from 9-10am. Searches for accommodation made up the largest share of searches at 52% and occurred the most between 3-5pm. Searches for services made up 35% of all searches and were highest between 12-5pm. Searches for attractions made up 8% of overall searches, peaking slightly at 2-3pm while searches for food made up 5% of total searches, also peaking slightly from 2-3pm.

