

## Development West Coast Visitor Trends June 2021

### Key figures June 2021

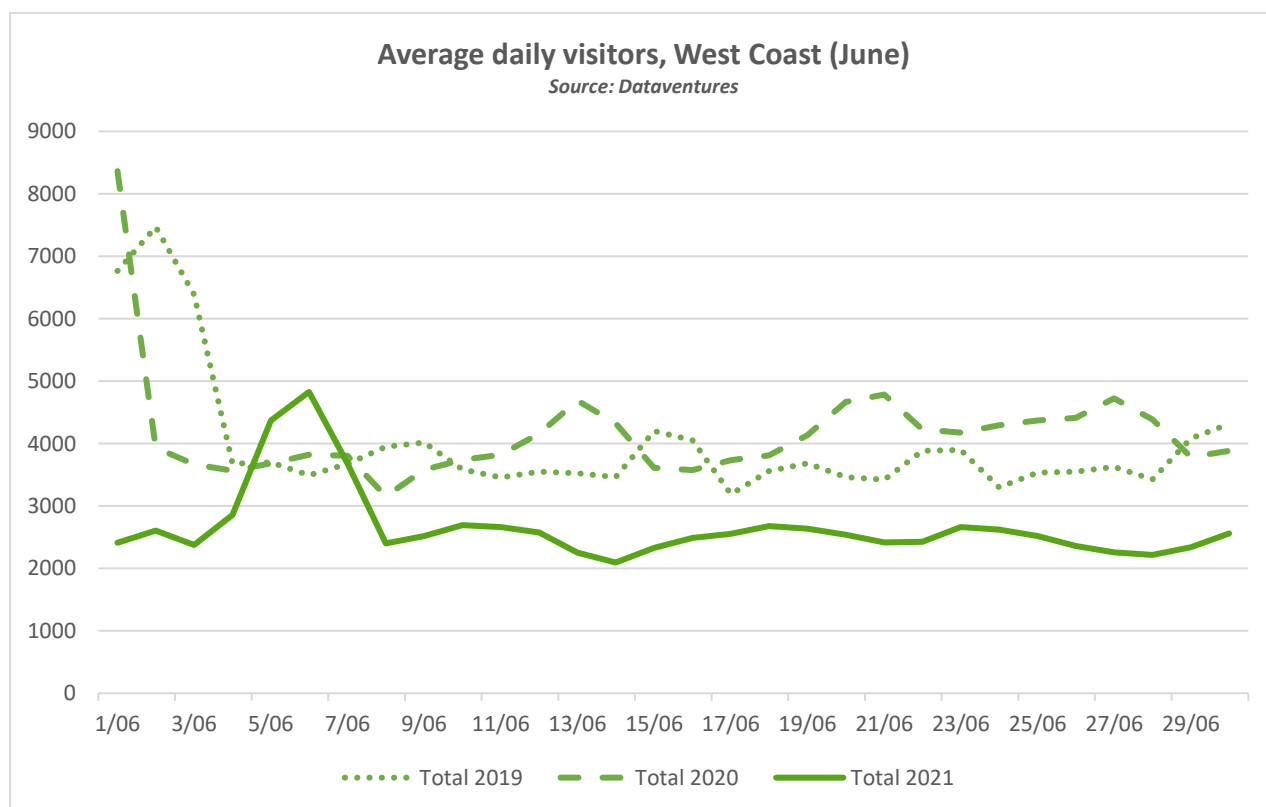
Average daily visitors: 2,664  
 Total monthly visitor spend: \$8.7m  
 Average daily spend: \$290k  
 Average daily spend per visitor: \$107.83  
 Average length of stay: 1.7 nights  
 Accommodation occupancy rate: 21%  
 Airbnb occupancy rate: 35%

### Visitor numbers

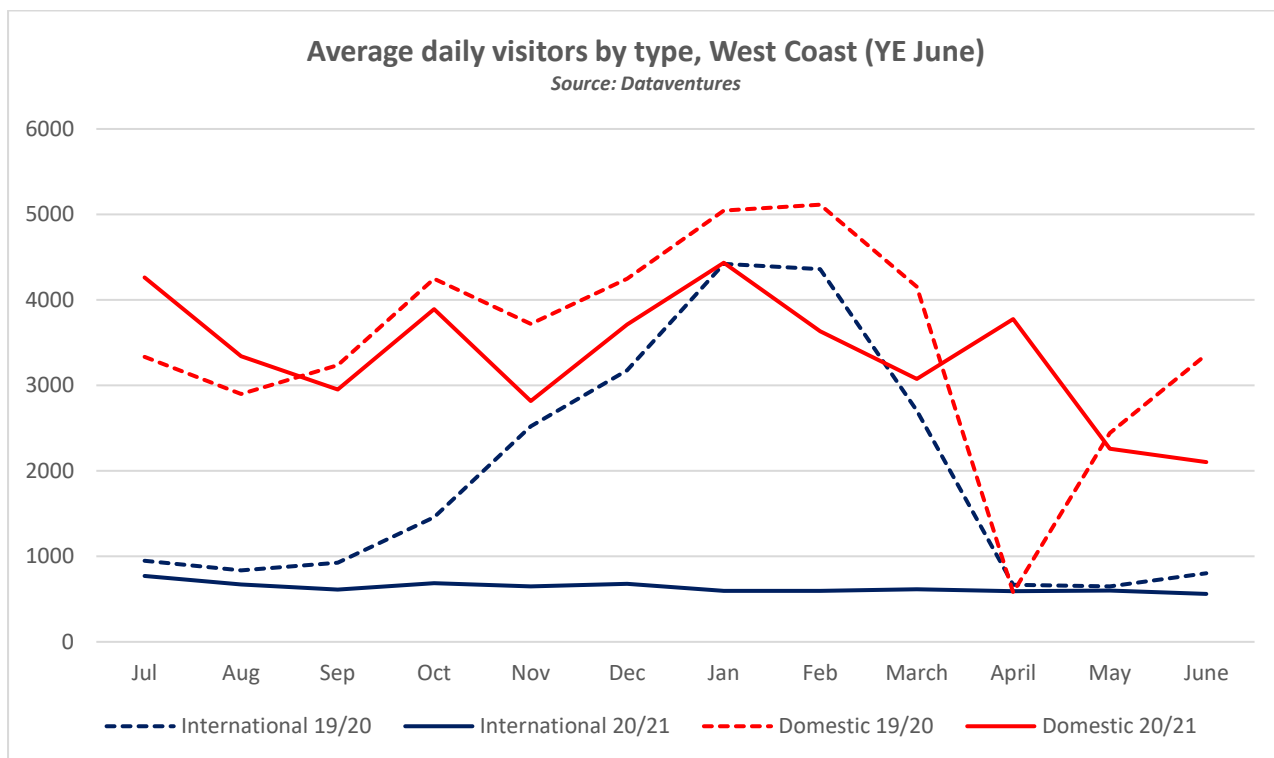
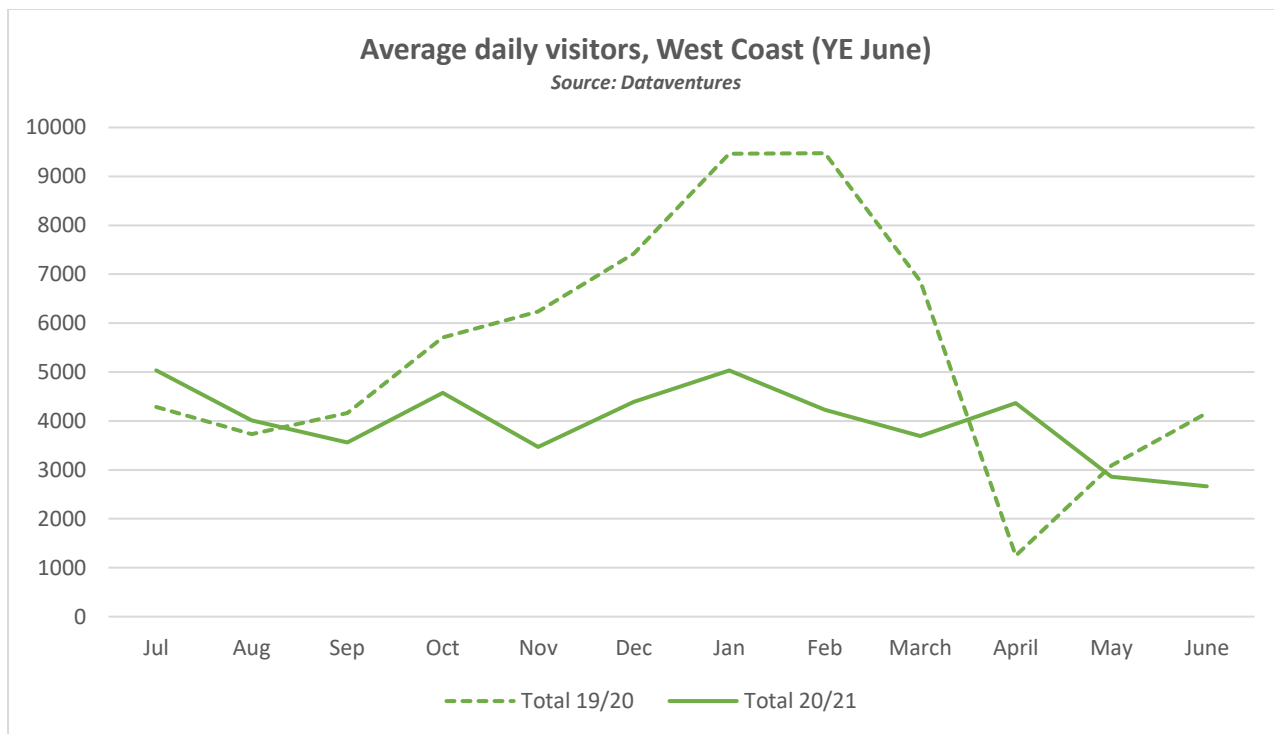
Dataventures figures measure the number of daily visitors in the West Coast region using phone data, which records the average number of visitors in an area every day at midday.

An average of 2,664 visitors were in the West Coast region each day in June 2021. This was a reduction of -33% or -1,333 average daily visitors compared to June 2019, and a reduction of -36% or 1,499 compared to June 2020.

An estimated 2,103 of these were domestic visitors, down -35% or -1,117 average daily visitors from June 2019 and down -37% or -1,259 from June 2020. International visitor numbers were down -28% from June 2019 and -30% from June 2020.



Over the YE June 2021 period, an average of 3,991 visitors were in the West Coast region each day. This was a reduction of -27% or -1,496 average daily visitors when compared to the previous 12-month period. At least 3,355 of these were domestic visitors. Average daily domestic visitor counts were down -5% or -176 visitors compared to the YE June 2020. The number of international visitors in the region each day over the YE June 2021 fell by -67% from the previous 12-month. This reflects a decrease in average daily international visitors from 1,956 to 636; a reduction of -1,320 average daily visitors.



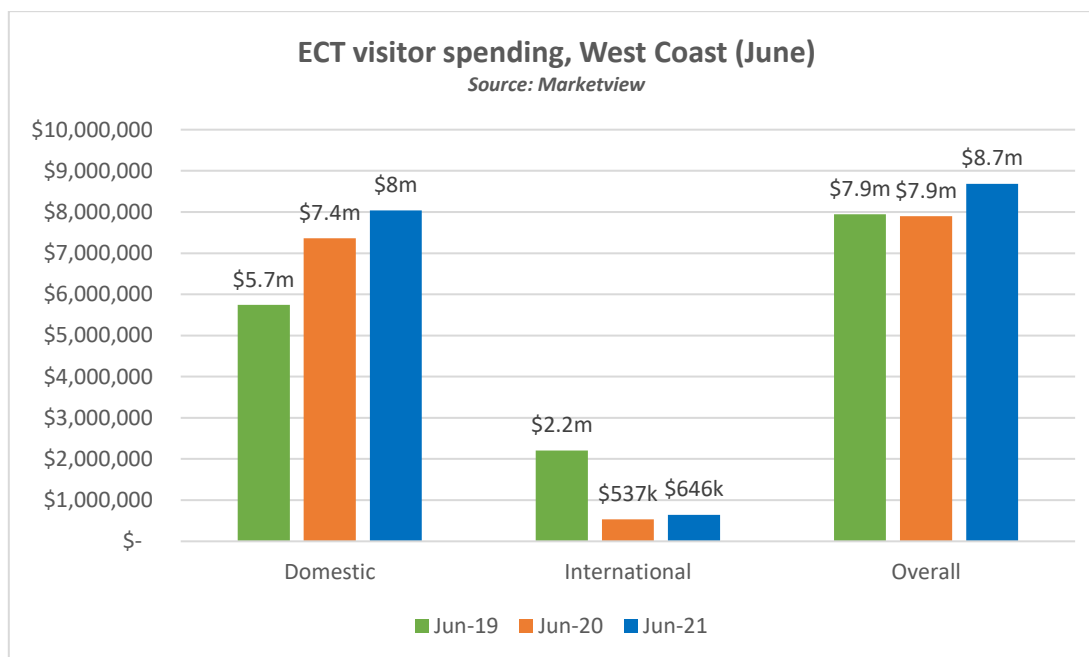
## Visitor Spending

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

When comparing visitor spending in June 2021 to that of June 2020, consideration should be given to the fact that the first week of June 2020 was spent in COVID-19 Response Alert 'Level 2', with a shift to 'Level 1' from the 9<sup>th</sup> onward.

Monthly ECT visitor spending in the West Coast RTO region in June 2021 was \$8.7m, up 9.3% or \$740k from June 2019 and up 10% or \$786k from June 2020. ECT spending by domestic visitors made up just over \$8m of this, up 40% or \$2.3m on June 2019 and up 9% or \$677k on June 2020. International ECT visitor spend for the month was \$646k, down -71% or \$1.6m on June 2019 and up 20% or \$109k on June 2020.

Spending in Westland District made up \$3.1m or 36.6% of the regions monthly ECT visitor spend, followed by Grey District at \$2.8m or 32.7% and Buller District at \$2.7m or 31.6% of regional spend.



When looking at monthly ECT visitor spending ranked by share of nationwide spend, Development West Coast sat at 23<sup>rd</sup> out of 36 RTOs with 1% of the total market.

When comparing average ECT transaction values by RTO, Development West Coast was 14<sup>th</sup> out of 36 with an average transaction value of \$50.15. The average ECT transaction value across all RTOs was \$50.70.

Average daily ECT visitor spending for June 2021 was \$289,526. Combining this with Dataventures average daily visitor numbers produces an estimated average daily ECT spend per visitor of \$107.83.

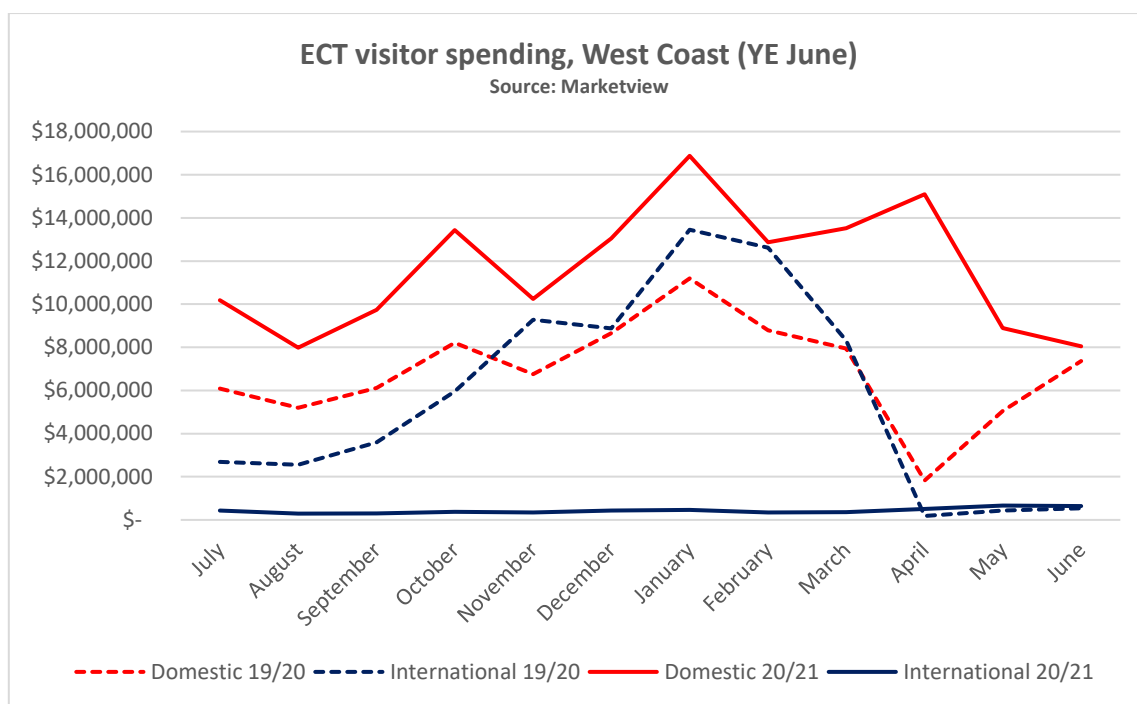
Daily ECT visitor spending was highest on Saturday the 5<sup>th</sup> of June at \$491,206.

Visitors from Canterbury made up the largest share of domestic ECT visitor spending in the West Coast in June 2021 at 37%, followed by visitors from Otago (11%); Auckland (9%); Tasman (8%) and Wellington (6%).



ECT visitor spending for the YE June 2021 was \$145.1m, down -4% or -\$6.6m from that of the YE June 2020. Domestic ECT visitor spending for the YE June 2021 was \$139.9m, up 68% or \$56.7m compared to the previous 12-month period. ECT spending by international visitors was \$5.2m, down -92% or \$6.3m on the YE June 2020.

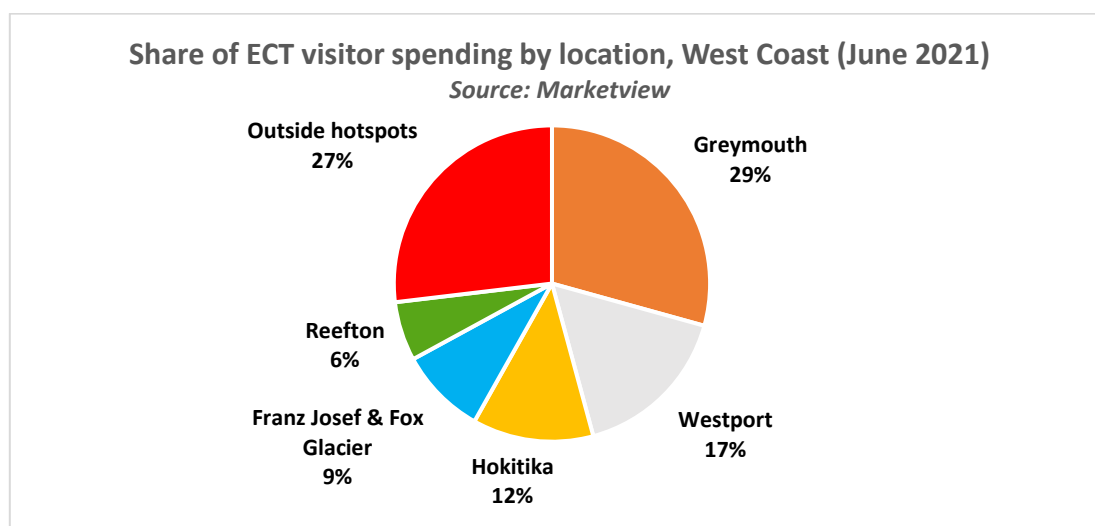


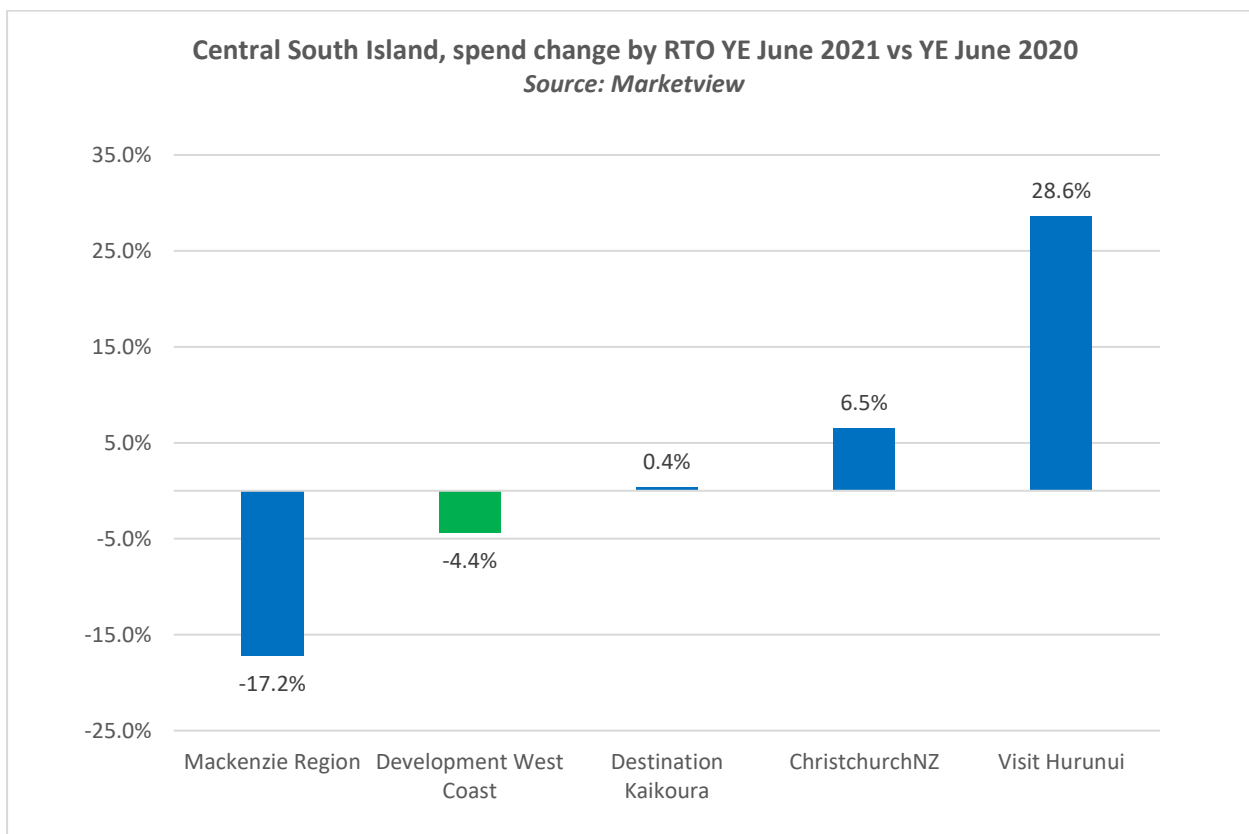
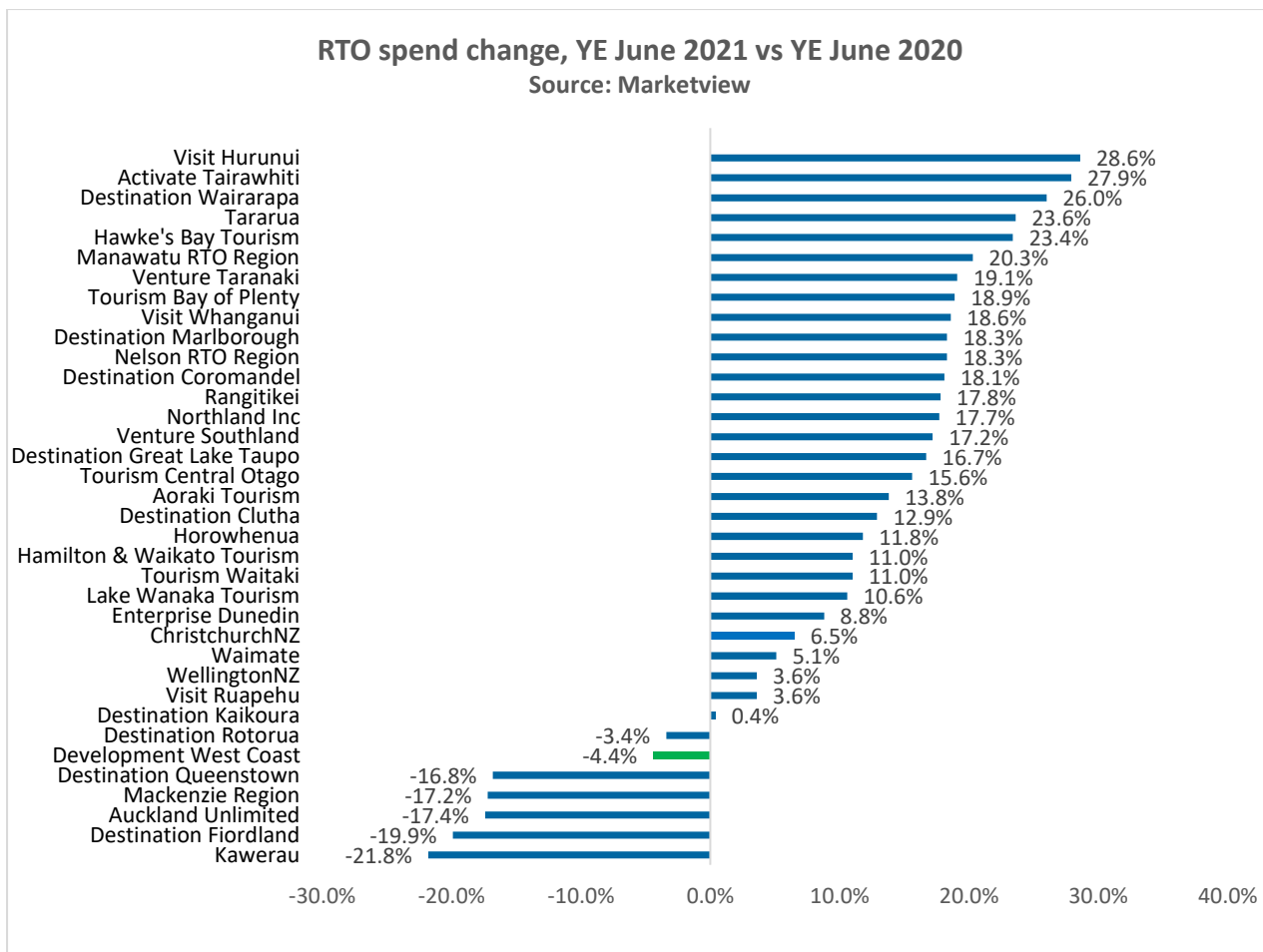


### Regional hotspots

The below table shows monthly and yearly spend figures for hotspot locations within the West Coast region. Spending within these hotspots made up **73%** of ECT visitor spending in the West Coast in June 2021 and **69%** in the YE June 2021.

Hotspot	June 2021 spend	Change from June 2019	Change from June 2020	YE June 2021 spend	Change from YE June 2020
Reefton	\$526k	+74%	+52%	\$7.3m	+50%
Westport	\$1.4m	+53%	+26%	\$21.5m	+26%
Greymouth	\$2.5m	+11%	+18%	\$38.6m	+14%
Hokitika	\$1.1m	+25%	+7%	\$18.1m	+9%
Franz Josef & Fox Glacier	\$742k	-48%	-9%	\$15.2m	-51%



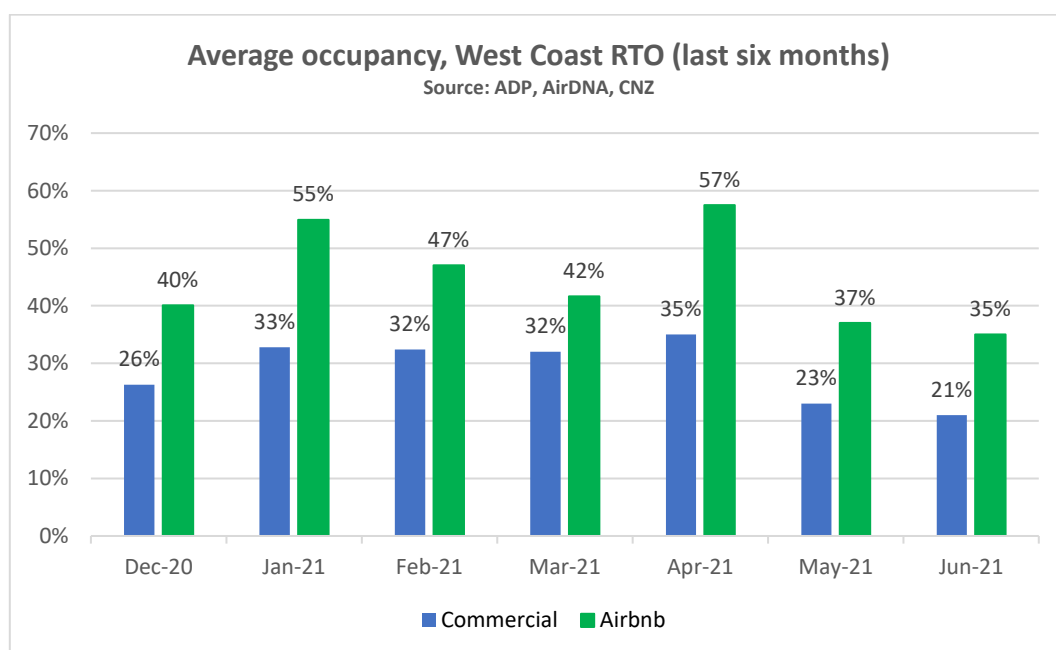
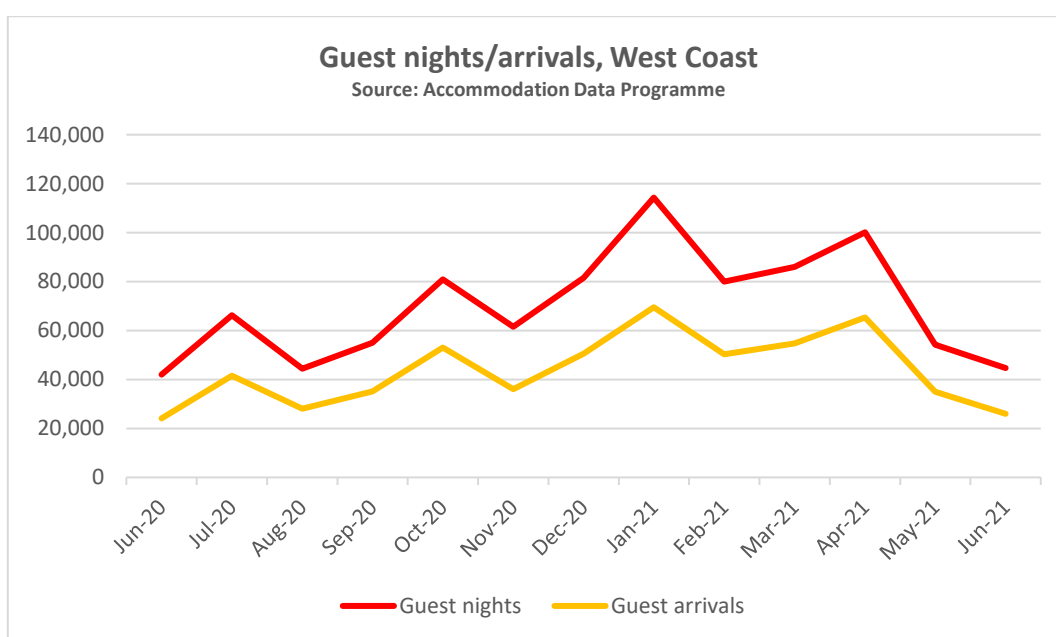


## Accommodation

### Commercial

26,000 recorded guest arrivals spent 44,700 guest nights in commercial accommodation in the West Coast RTO area in June 2021. Guest arrivals were up 8% from June 2020 and guest nights were up 6%. Of these guest nights, 40% were spent in the Westland District, 20% in Buller District and 22% in Grey District. Guest nights spent on the West Coast made up 2% of total guest nights in NZ for the month. 142 accommodation providers on the West Coast were registered on the ADP in June 2021, with 127 of these identifying as 'active' (a reduction of 2 since the previous month).

The average occupancy rate was 21%, below the national average of 40%. Occupancy in Grey District was 26%, followed by Buller District at 21% and Westland District at 19%. The average length of stay was 1.7 nights, below the national average of 2.2 nights.



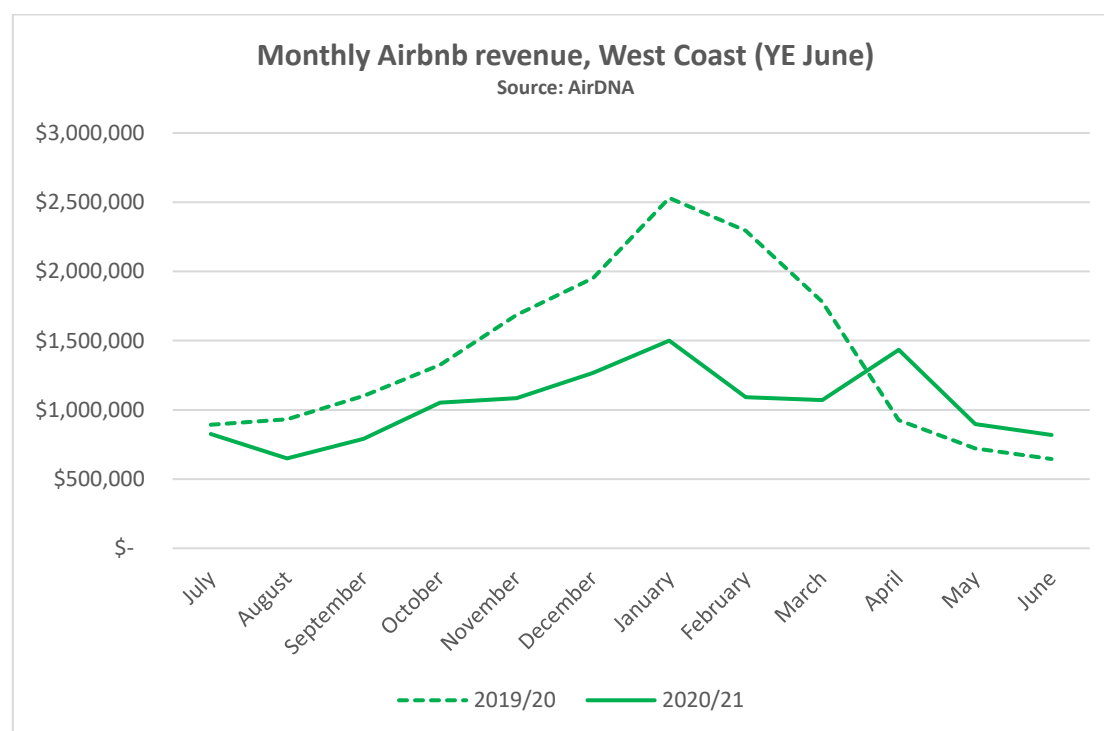
## Airbnb

A total of 584 active rentals in the West Coast region were listed on Airbnb in June 2021, a decrease of 41 from the previous month. Of these, 43% were in Westland District, 65% in Buller District and 21% in Grey District. The average Airbnb occupancy rate in the region in June 2021 was 35%, up 3 percentage points from the same month last year.

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

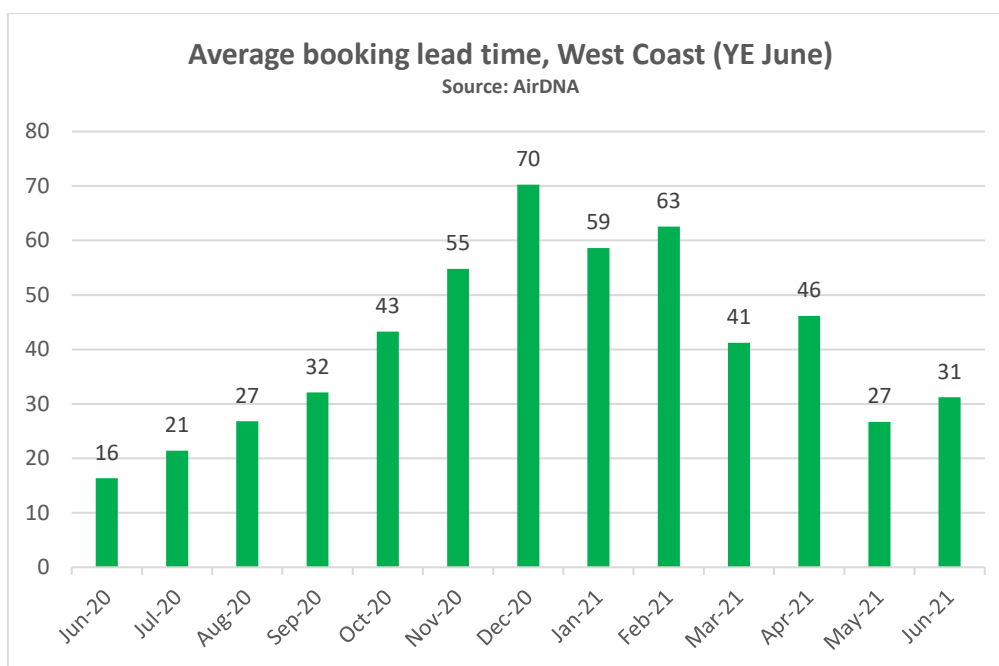
Average daily rates by listing type, West Coast Airbnb (April 2021)					
District	Entire home		Private room		Shared room
Westland District	\$151	-0.7%	\$147	+4%	\$35 -
Buller District	\$160	+1%	\$88	-9%	\$29
Grey District	\$140	+2%	\$92	-5%	N/A

Airbnb revenue for the month totaled at \$818k in the West coast region, up 8% from June 2019 and up 27% from June 2020. A total of \$12.5m in Airbnb revenue was generated over the YE June 2021, down -23% or \$3.6m from the YE June 2020. The largest proportional decline occurred in the Westland District at -37%, followed by Grey District at -5%. Meanwhile, Airbnb revenue in Buller District increased by 17% compared to the previous 12-month period.



The average booking lead time for West Coast Airbnb listings booked for June 2021 was 31 days. This was 15 days longer than the average booking lead time in June 2020. Booking lead times were longest for listings in the Buller District at 41 days; followed by 28 days in Grey District and 25 days in Westland 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 and should not be treated as a representation of the entire visitor population.

#### **Visitor Movements- Prior & Next Regions**

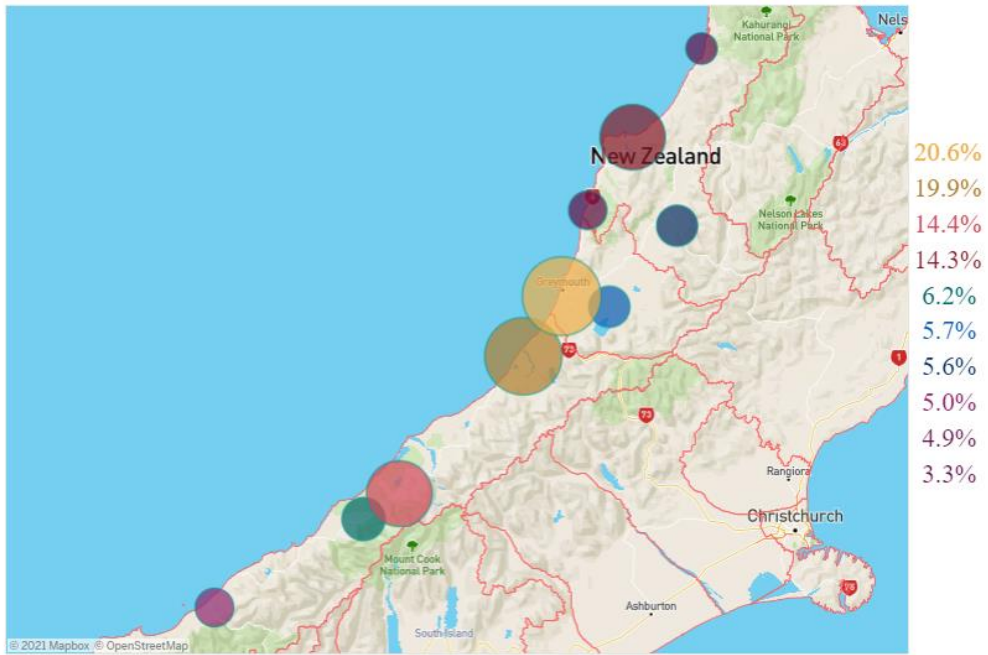
Prior and next regions show the RTO areas that Triptech users who visited the West Coast in June 2021 were 'pinged' in immediately before and after visiting. This provides insight into direction of travel and patterns in visitor movements. The below tables show the top regions that users were 'pinged'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

<b>Top 'prior' regions- West Coast June 2021</b>	
Christchurch	39%
Nelson Tasman	28%
Wanaka	20%
Queenstown	3%
<b>Top 'next' regions- West Coast June 2021</b>	
Christchurch	37%
Wanaka	27%
Nelson Tasman	26%
Queenstown	3%

#### **Overnight stay locations**

The below map shows popular overnight stay locations for users in June 2021. Clusters were detected at the following locations: Greymouth (21%); Hokitika (20%); Franz Josef (14%); Westport (14%); Fox Glacier (6%); Lake Brunner (6%); Reefton (6%); Haast (5%); Punakaiki (5%) and Karamea (3.3%).

**Overnight Stay Clusters**



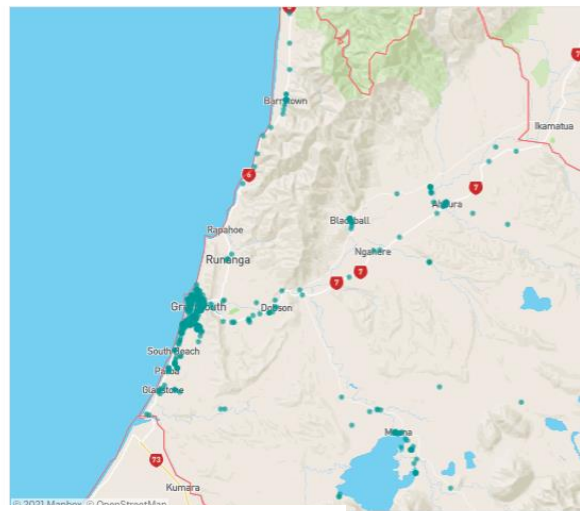
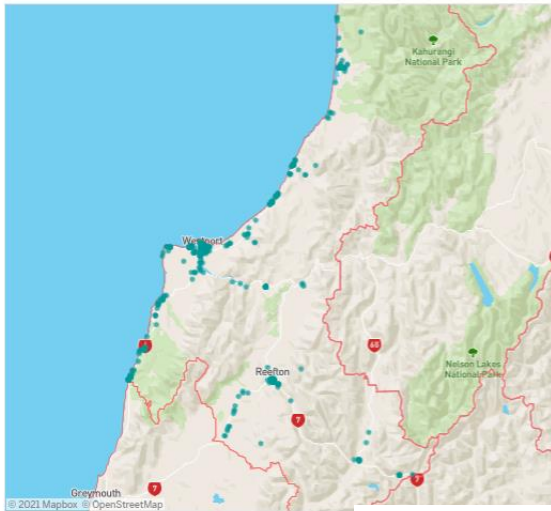
**Overnight locations- one dot corresponds to one night spent by a Triptech user**

**Overnight Stay Locations (One Dot = One Night)**

**Buller District**

**Overnight Stay Locations (One Dot = One Night)**

**Grey District**



**Overnight Stay Locations (One Dot = One Night)**

**Westland District**

