

SOUTHLAND TOURISM KEY INDICATORS

August 2019



Southland 
www.southlandnz.com

GREAT SOUTH 

SOUTHLAND TOURISM SNAPSHOT

Year End August 2019



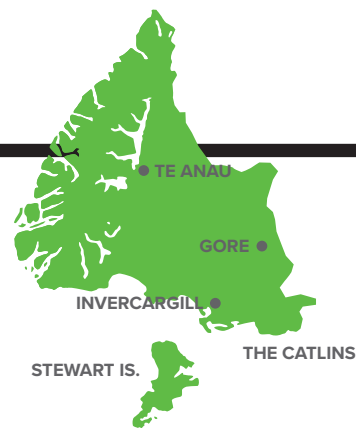
Guest nights up 1.2% to 1,205,827



Total spend up 3.2% to \$677M

Southland is continuing to see good growth out of the international market, with the US, German and Australian markets continuing to show double digit percentage increases. The domestic market, on the other hand, is staying relatively similar to last year's peak.

SOUTHLAND REGION



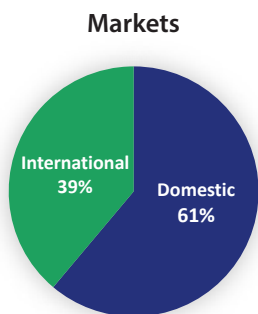
TOURISM SPEND STATISTICS

Total Spend in NZD Figures for Year End August

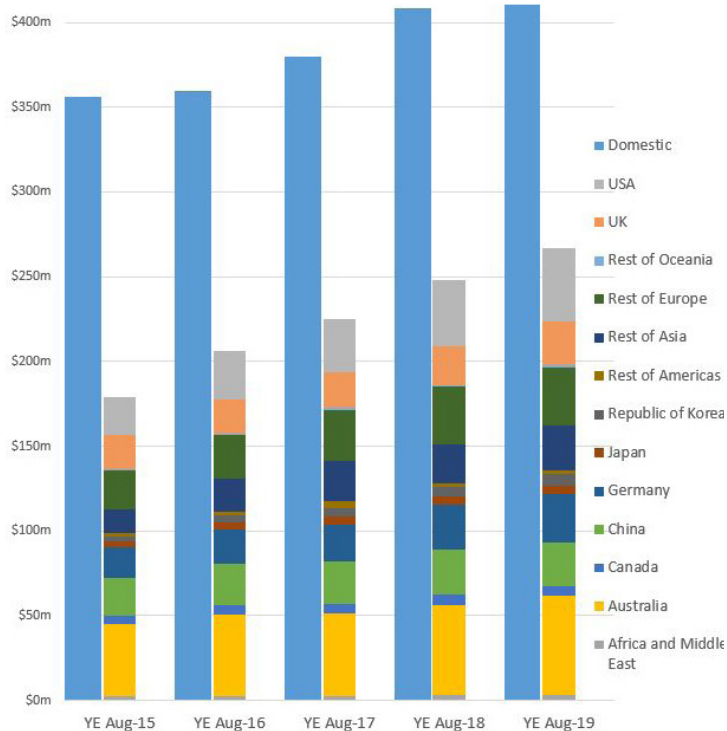
MRTEs (Monthly Regional Tourism Estimates)

- International visitor spend up 7.5% to \$267 million
- Domestic visitor spend up 0.5% to \$410 million
- Total spend up 3.2% to \$677 million
- Top 5 International Markets

1. Australia (up 9.5%)
2. USA (up 10.4%)
3. Germany (up 9.5%)
4. UK (up 11.2%)
5. China (down 5.7%)



Tourism Spend Estimate Year End August



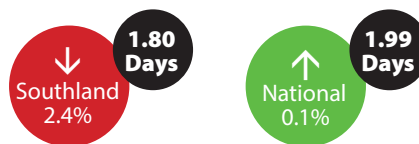
ACCOMMODATION STATISTICS

Guest Night Figures for Year End August

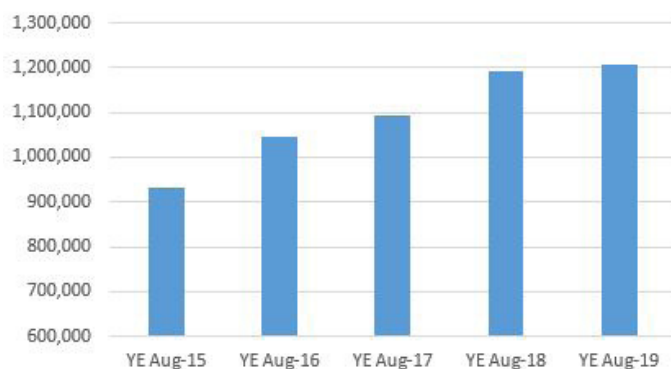
CAM (Commercial Accommodation Monitor)

- International guest nights up 1.1% to 725,450
- Domestic guest nights up 1.4% to 480,377
- Total guest nights up 1.2% to 1,205,827
- Occupancy rate down from 42.4% to 41.8%
- Daily capacity up 2.4% to 4,532 stay-units

Average Length of Stay Year End August



Guest Nights Year End August



INVERCARGILL CITY



TOURISM SPEND STATISTICS

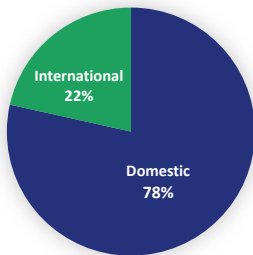
Total Spend in NZD Figures for Year End August

MRTE's (Monthly Regional Tourism Estimates)

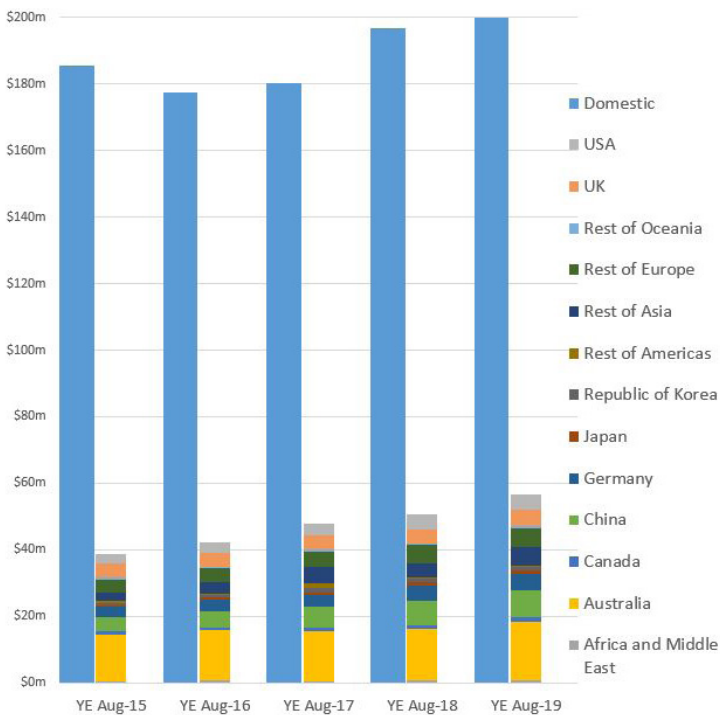
- International visitor spend up 11.7% to \$57 million
- Domestic visitor spend up 2.7% to \$200 million
- Total spend up 3.7% to \$257 million
- Top 5 International Markets

1. Australia (up 13.3%)
2. China (up 12.6%)
3. Germany (up 7.4%)
4. UK (up 13.7%)
5. USA (up 3.1%)

Markets



Tourism Spend Estimate Year End August



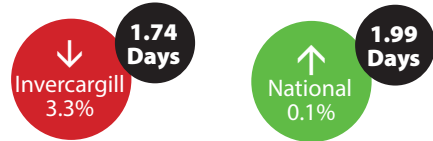
ACCOMMODATION STATISTICS

Guest Night Figures for Year End August

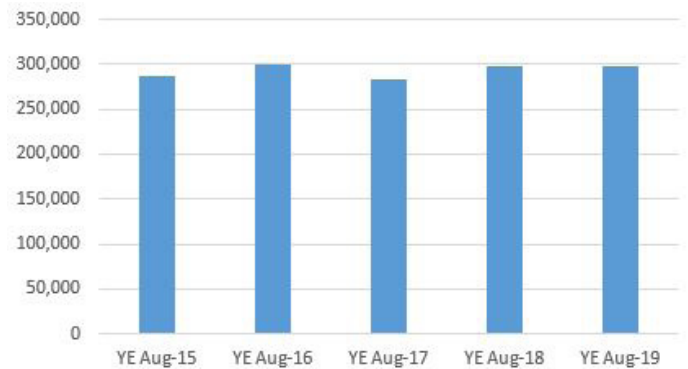
CAM (Commercial Accommodation Monitor)

- Guest nights steady at 297,495
- Occupancy rate down from 41.0% to 40.9%
- Daily capacity up 1.1% to 1,238 stay-units

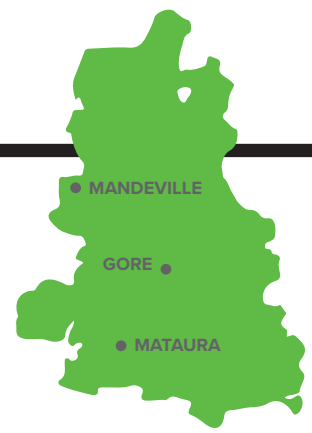
Average Length of Stay Year End August



Guest Nights Year End August



GORE DISTRICT



TOURISM SPEND STATISTICS

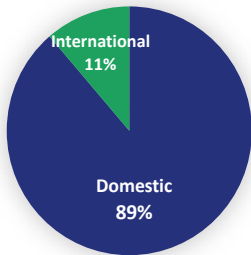
Total Spend in NZD Figures for Year End August

MRTEs (Monthly Regional Tourism Estimates)

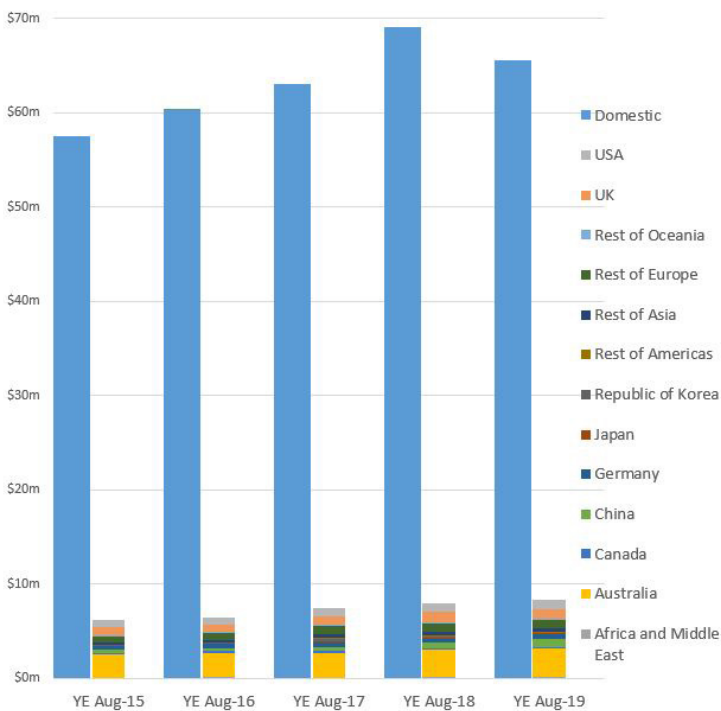
- International visitor spend up 5% to \$8 million
- Domestic visitor spend down 5.2% to \$65 million
- Total spend down 4.2% to \$74 million
- Top 5 International Markets

1. Australia (up 7.0%)
2. USA (up 20.0%)
3. UK (down 17.3%)
4. China (up 43.8%)
5. Germany (up 18.9%)

Markets



Tourism Spend Estimate Year End August



ACCOMMODATION STATISTICS

Guest Night Figures for Year End August

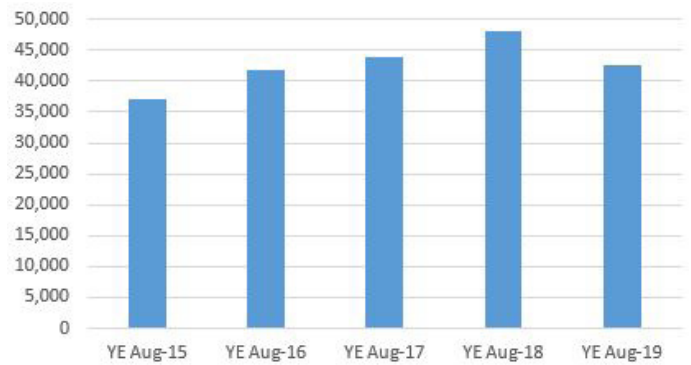
CAM (Commercial Accommodation Monitor)

- Guest nights down 11.7% to 42,495
- Occupancy rate down from 50.0% to 42.9%
- Daily capacity up 0.2% to 181 stay-units

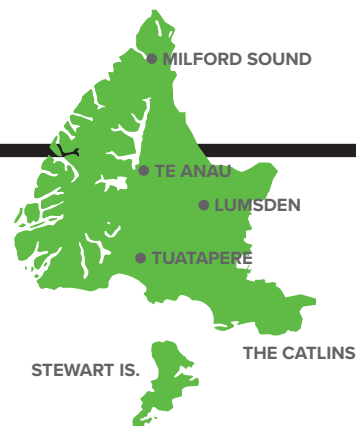
Average Length of Stay Year End August



Guest Nights Year End August



SOUTHLAND DISTRICT



TOURISM SPEND STATISTICS

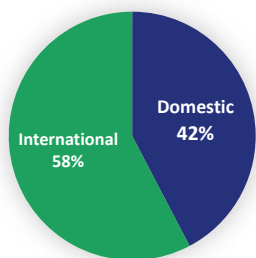
Total Spend in NZD Figures for Year End August

MRTEs (Monthly Regional Tourism Estimates)

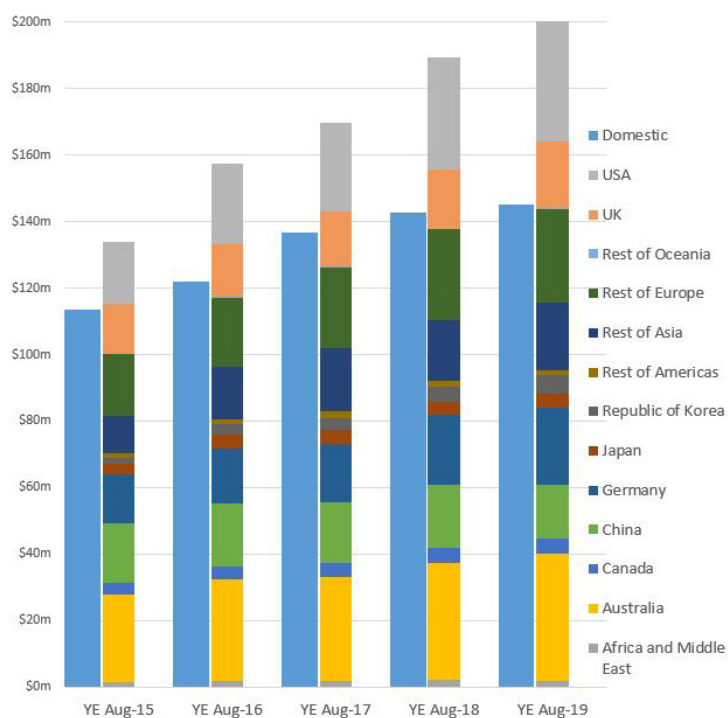
- International visitor spend up 6.4% to \$202 million
- Domestic visitor spend up 1.8% to \$145 million
- Total spend up 4.5% to \$347 million
- Top 5 International Markets

1. Australia (up 8.0%)
2. USA (up 11.1%)
3. Germany (up 9.7%)
4. UK (up 12.3%)
5. China (down 14.2%)

Markets



Tourism Spend Estimate Year End August



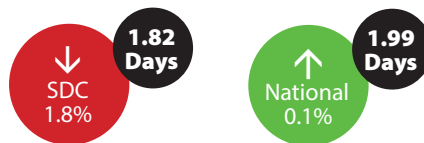
ACCOMMODATION STATISTICS

Guest Night Figures for Year End August

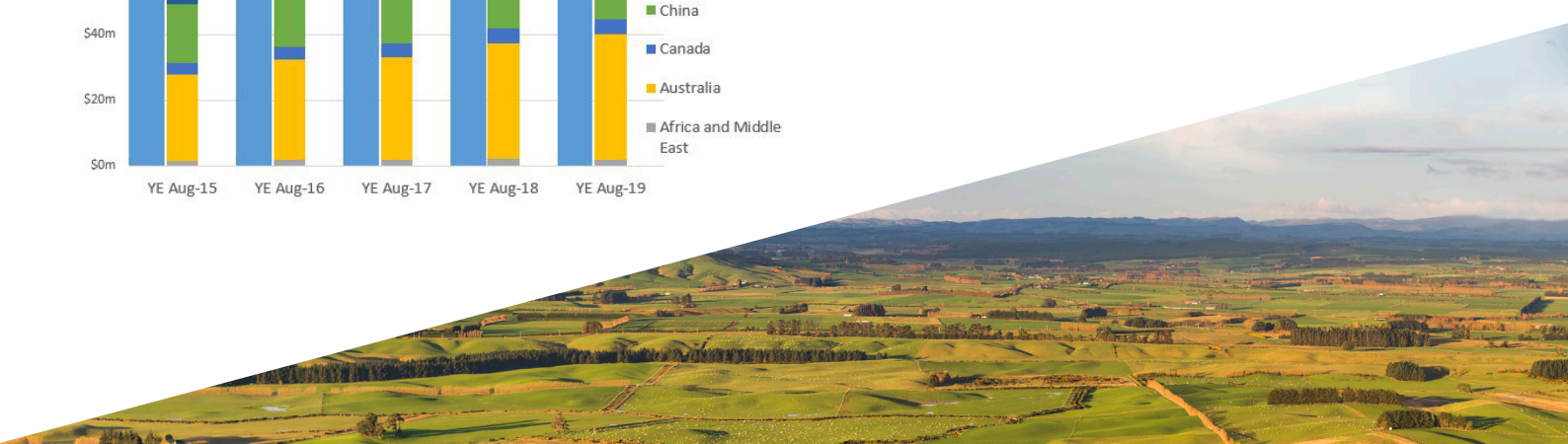
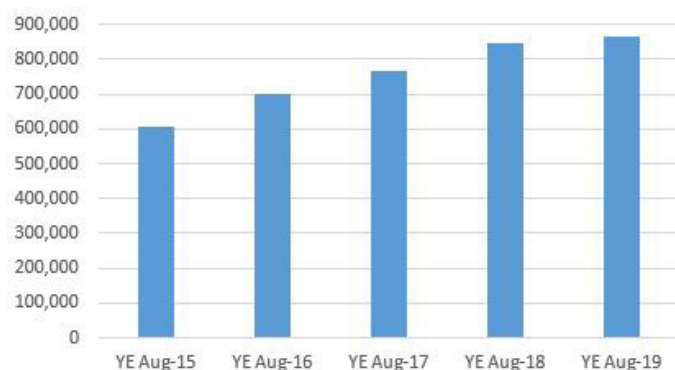
CAM (Commercial Accommodation Monitor)

- Guest nights up 2.4% to 865,837
- Occupancy rate down from 42.5% to 42.1%
- Daily capacity up 3.1% to 3,113 stay-units

Average Length of Stay Year End August



Guest Nights Year End August

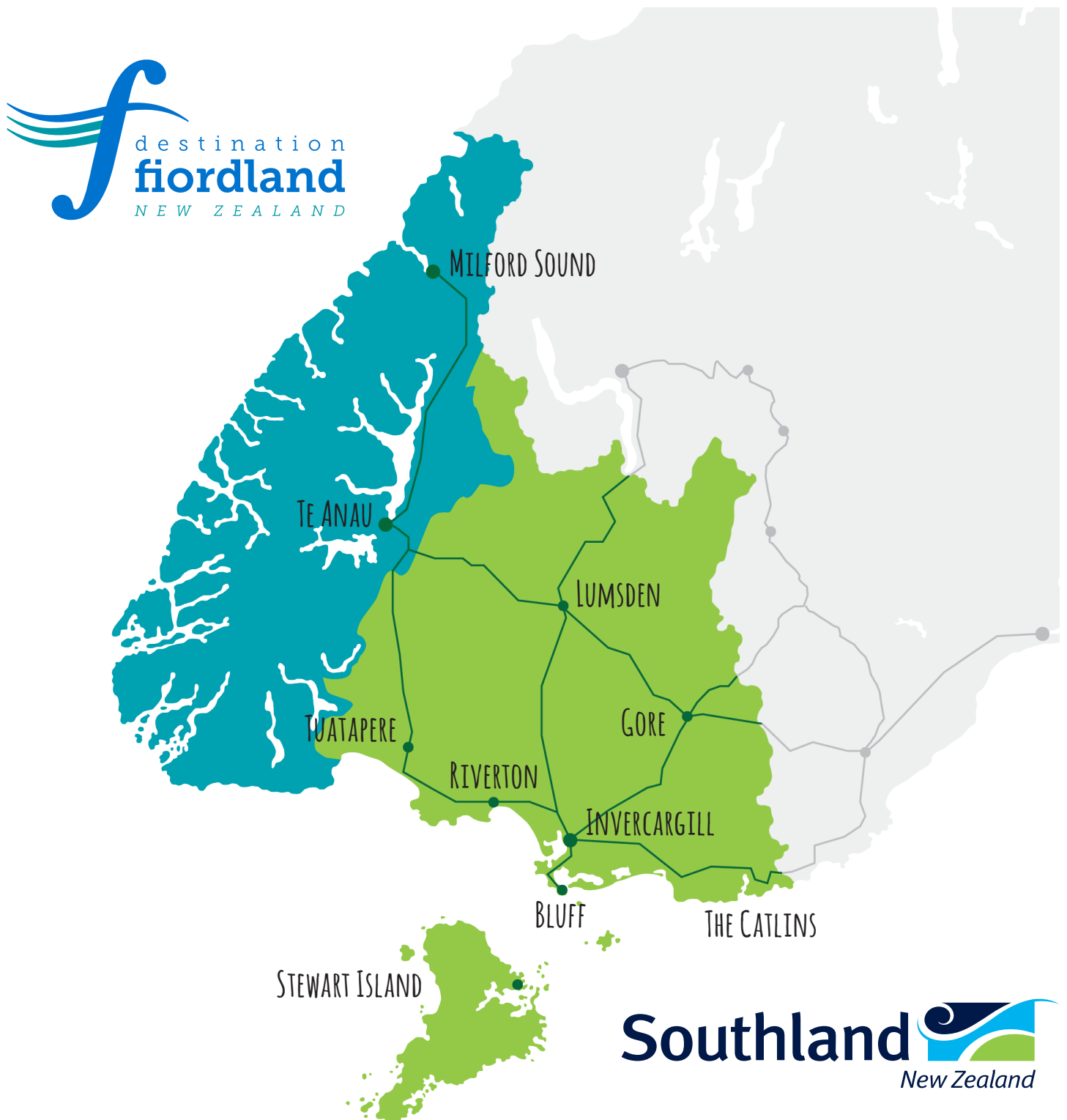


SOUTHLAND RTOS

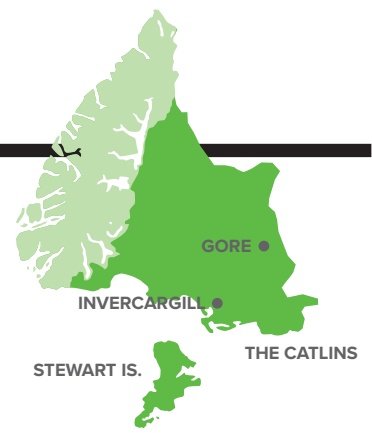
Statistics New Zealand defined geographic areas for Southland's two RTOs (as at August 2019)

RTO stands for 'Regional Tourism Organisation'; they exist across NZ. RTOs are responsible for destination marketing - the promotion of their regions to potential domestic and international visitors.

Destination Fiordland is defined as Fiordland National Park, Manapouri, Te Anau and Te Anau Downs. It is important to note that Destination Fiordland is a membership based agency that has, or has had in the past, members beyond these boundaries. This definition allows Destination Fiordland, with disclosure to Great South (Southland NZ), to continue targeting other operators outside of the areas marked on this map.



SOUTHLAND RTO



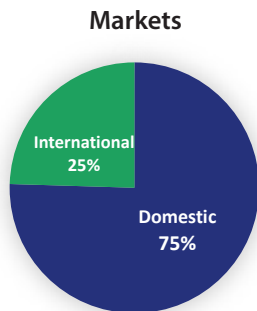
TOURISM SPEND STATISTICS

Total Spend in NZD Figures for Year End August

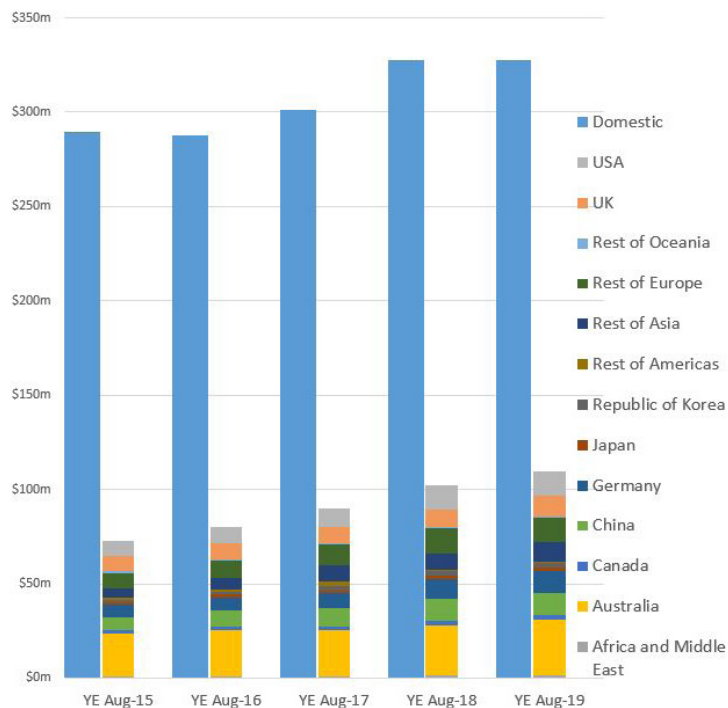
MRTEs (Monthly Regional Tourism Estimates)

- International visitor spend up 7.4% to \$110 million
- Domestic visitor spend steady at \$328 million
- Total spend up 1.8% to \$438 million
- Top 5 International Markets

1. Australia (up 10.2%)
2. USA (up 5.2%)
3. Germany (up 7.9%)
4. UK (up 10.1%)
5. China (up 4.3%)



Tourism Spend Estimate Year End August



ACCOMMODATION STATISTICS

Guest Night Figures for Year End August

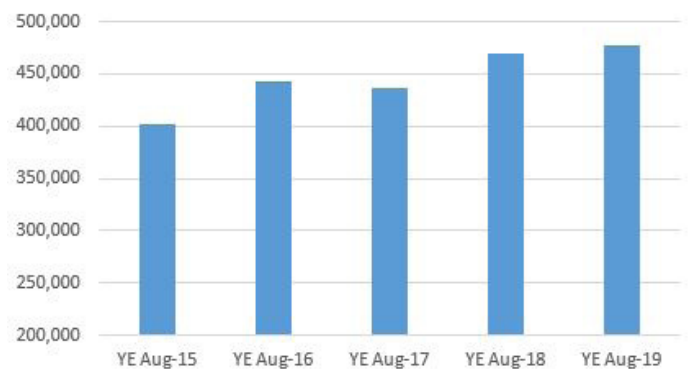
CAM (Commercial Accommodation Monitor)

- International guest nights up 5.2% to 192,392
- Domestic guest nights down 0.8% to 285,053
- Total guest nights up 1.5% to 477,445
- Occupancy rate down from 38.5% to 37.7%
- Daily capacity up 3.4% to 2,181 stay-units

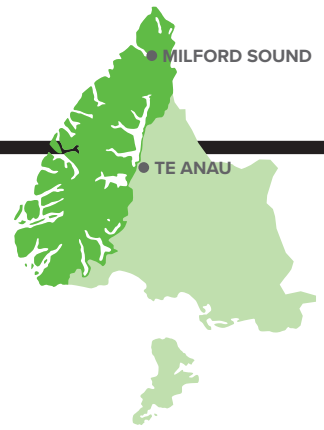
Average Length of Stay Year End August



Guest Nights Year End August



FIORDLAND RTO



TOURISM SPEND STATISTICS

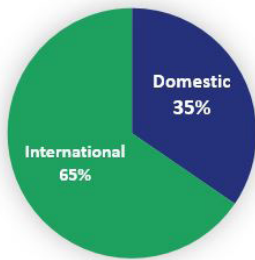
Total Spend in NZD Figures for Year End August

MRTEs (Monthly Regional Tourism Estimates)

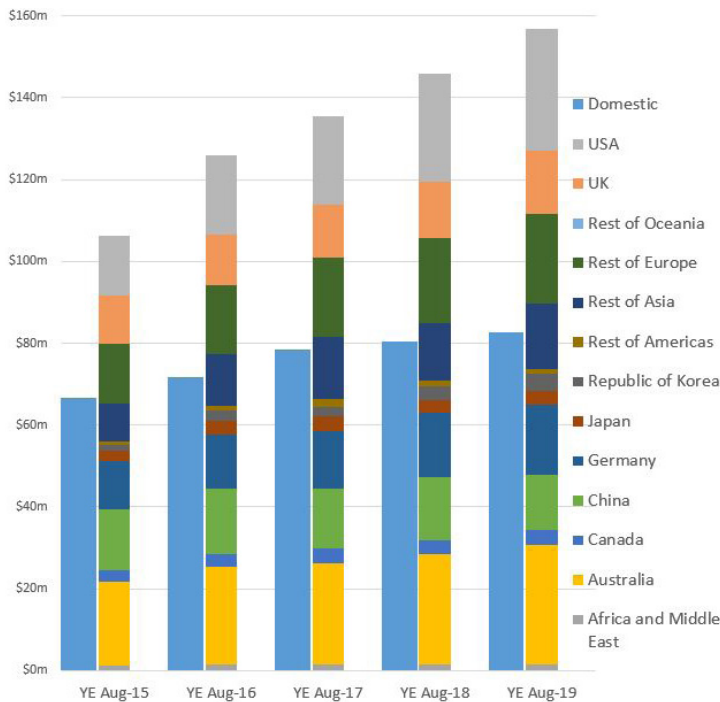
- International visitor spend up 5.8% to \$239 million
- Domestic visitor spend up 2.7% to \$83 million
- Total spend up 5.8% to \$239 million
- Top 5 International Markets

1. USA (up 12.9%)
2. Australia (up 8.9%)
3. Germany (up 10.5%)
4. UK (up 11.9%)
5. China (down 13.1%)

Markets



Tourism Spend Estimate Year End August



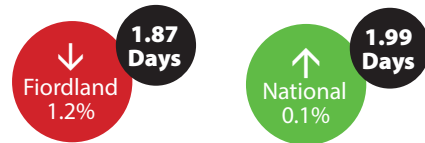
ACCOMMODATION STATISTICS

Guest Night Figures for Year End August

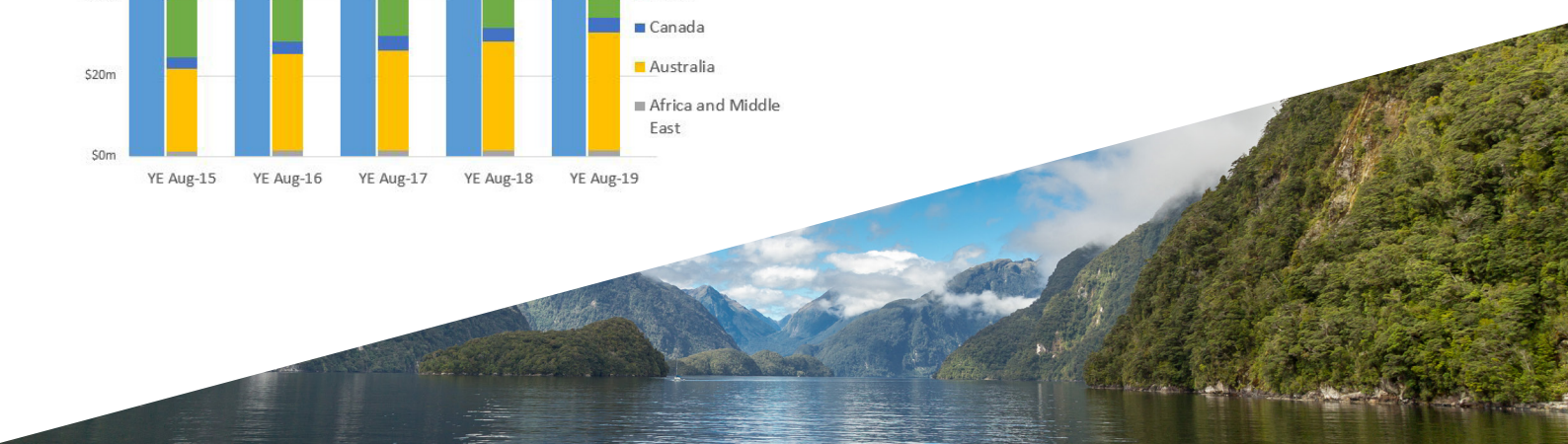
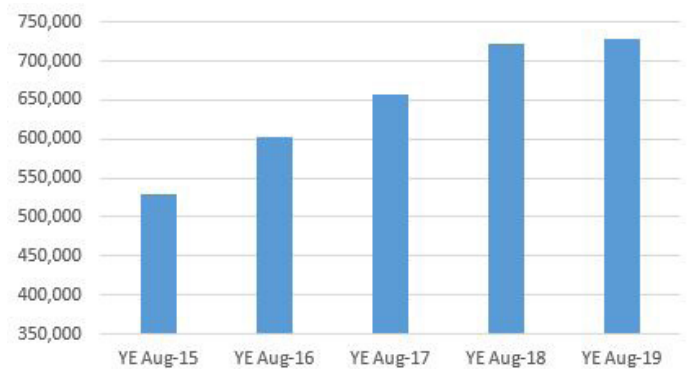
CAM (Commercial Accommodation Monitor)

- International guest nights down 0.3% to 533,058
- Domestic guest nights up 4.7% to 195,324
- Total guest nights up 1.0% to 728,382
- Occupancy rate down from 46.0% to 45.6%
- Daily capacity up 1.5% to 2,352 stay-units

Average Length of Stay Year End August



Guest Nights Year End August



AIRBNB FIGURES

Airbnb is the largest peer to peer accommodation facilitator in the world. Users can list a spare room or entire house on the platform or stay at another user's place. As of 2019, there are over 6 million listings worldwide in over 191 countries. Many visitors (both domestic and international) to Southland use Airbnb as they are familiar with the platform and user experience.

STATISTICS FOR YE AUGUST 2019:

Southland Region	705 Listings	10.5% Growth
Invercargill City	180 Listings	0% Growth
Gore District	40 Listings	41.4% Growth
Southland District	484 Listings	37.9% Growth



airbnb

ABOUT THESE STATISTICS

All figures are annual year end to the latest month available. This allows comparison of market trends against the previous year however it means that not all the data in this report is for the current month.

Data is provided for:

- Southland Region
- Territorial Local Authorities (TLAs)
 - Invercargill City
 - Gore District
 - Southland District
- Regional Tourism Organisations (RTOs)
 - Southland RTO
 - Fiordland RTO

Great South continues to work with tourism operators to build their profile and develop more reasons for both domestic and international markets to spend more while they are in the region.

SOURCES

Monthly Regional Tourism Estimates – Ministry of Business, Innovation & Employment - August 2019

The MRTEs measure the expenditure of domestic and international visitors in regions across the country. Users can filter the information, e.g. by country of origin, tourism product grouping such as accommodation, transport and retail sales, and by year.

Airbnb figures are based on searches undertaken each month by Great South and rely on individual listings being accurately coded to the correct region keyword.

Commercial Accommodation Monitor – Ministry of Business, Innovation & Employment - August 2019

Definition of 'stay-units': Number of rooms available in Hotels and Motels, number of beds in backpackers, number of sites in holiday parks.

A note on 'average length of stay': This is a great way to measure the availability of accommodation and experiences that entice tourists to stay longer. However, increases and declines in this figure often appear better/worse than they actually are. For example, a drop of 2% may seem bad, but equates to only an hour in real terms.

Total domestic (and international) guest nights spent in short term accommodation (hotels, holiday parks, backpackers and motels), by month and year.

All reasonable efforts have been taken to ensure the quality and accuracy of the information. Great South cannot guarantee the completeness of the information and accepts no liability for any loss suffered as a result of reliance on it. The information is not legal or professional advice and may contain information provided by other information providers. Information may be changed, deleted, added to or otherwise amended without notice.

CONTACT DETAILS

info@greatsouth.nz

03 211 1400

