

West Coast Visitor Trends April 2021

Key figures:

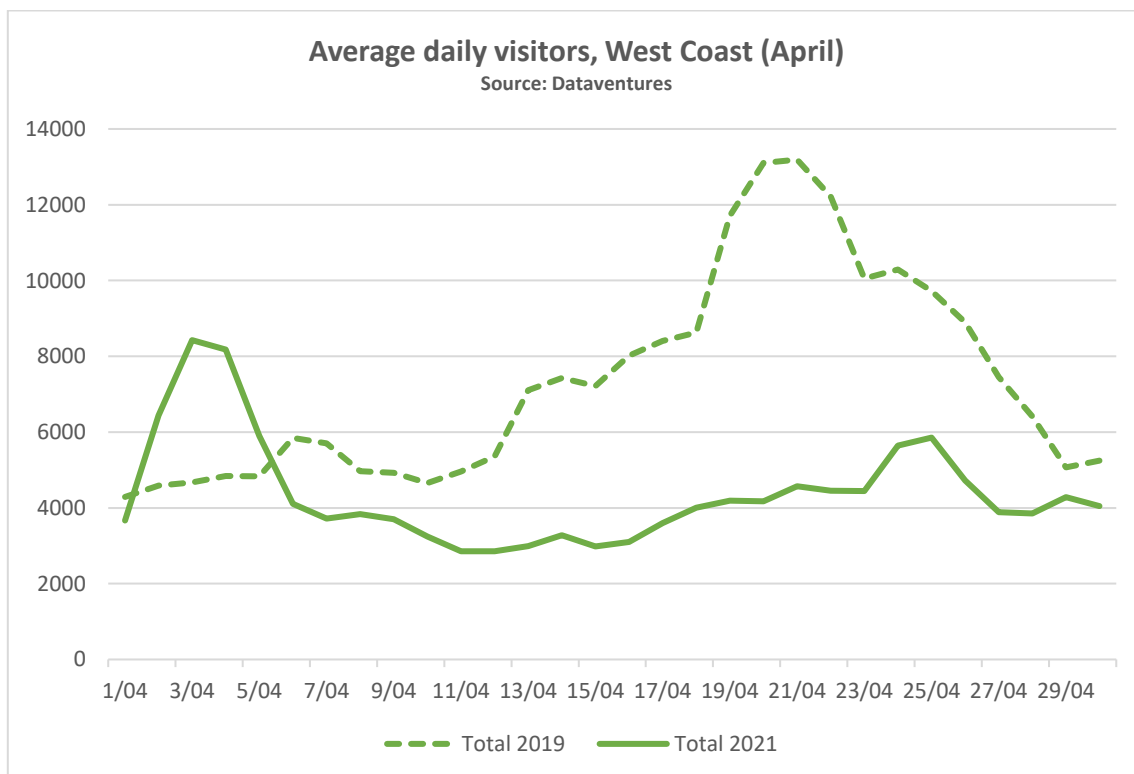
Average daily visitors: 4,367
 Monthly ECT visitor spend: \$15.8m
 Average daily spend: \$530k
 Average daily spend per visitor: \$120.58
 Average length of stay: 1.6 nights
 Accommodation occupancy rate: 35%
 Airbnb occupancy rate: 57%

April 2019 will be used as the comparison month in this month's report as April 2020 was largely spent in lockdown. As a result, comparisons to April 2020 are significantly skewed.

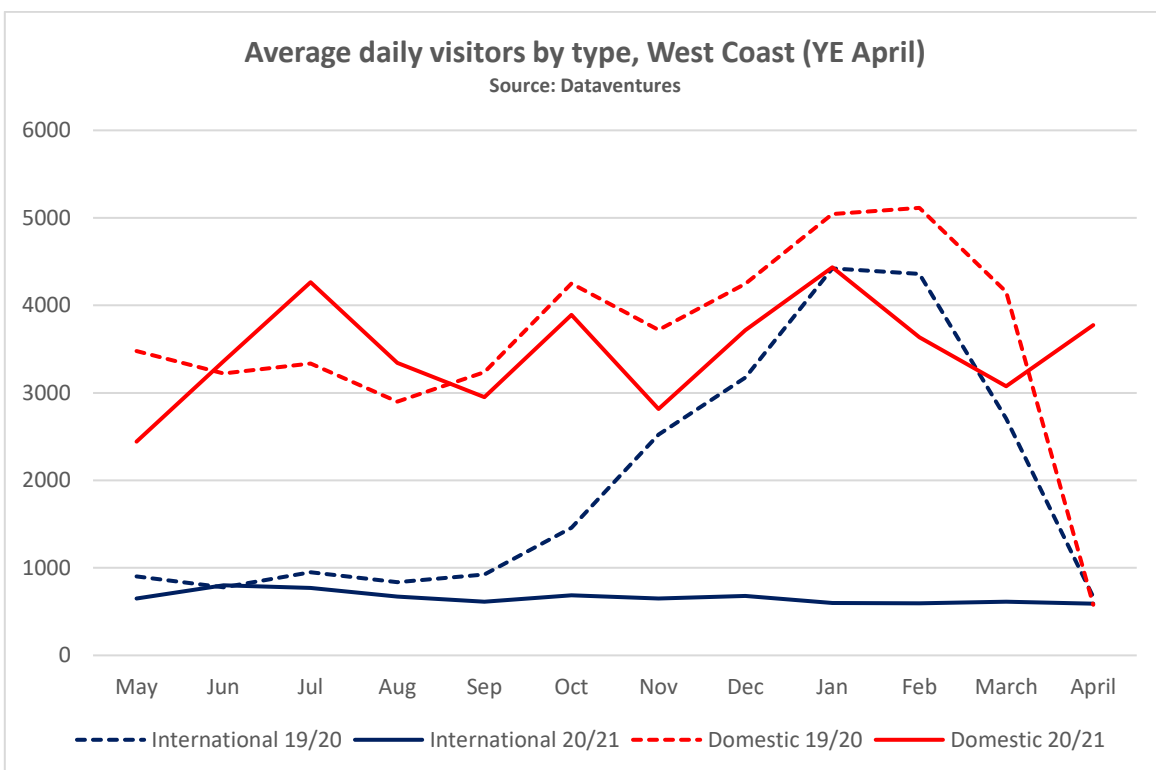
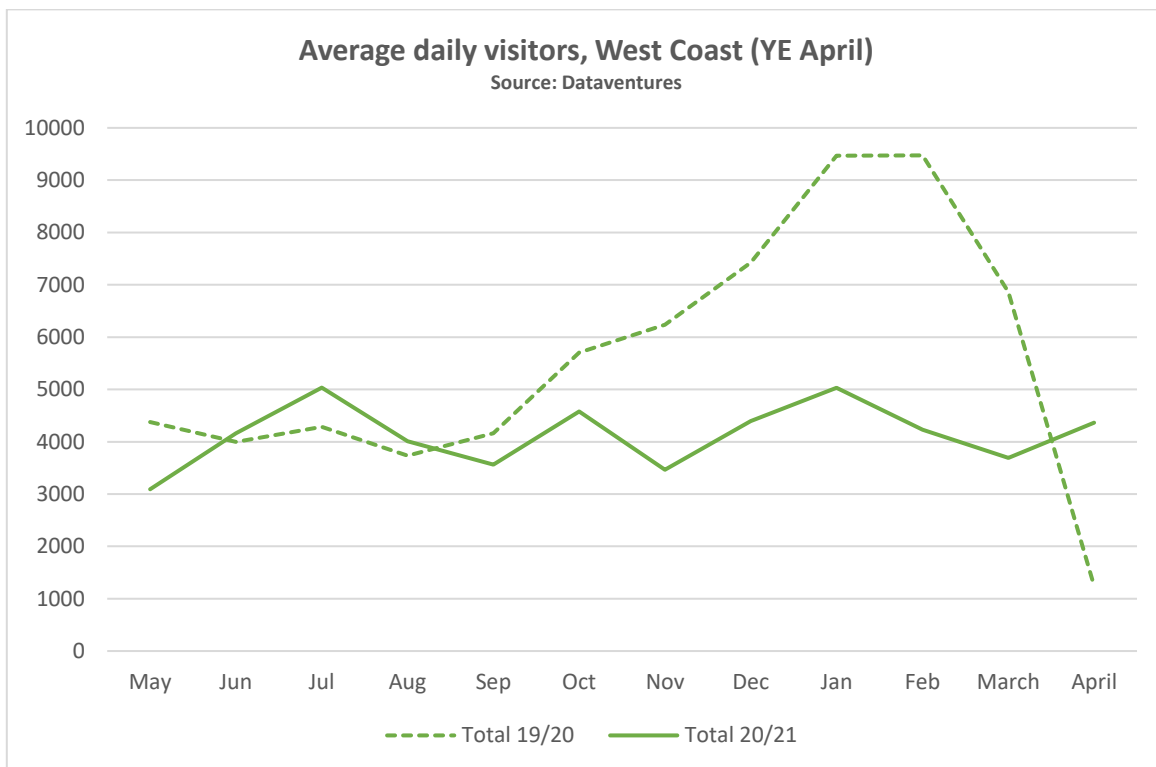
Visitor numbers

Dataventures figures capture the average number of visitors in a region each day at midday. An average of 4,367 visitors were in the West Coast region per day in April 2021. This was -40% less than in April 2019, equivalent to a reduction of 2,960 average daily visitors. Domestic visitor numbers were down -32% from April 2019 (a reduction of 1,774 average daily visitors) and international visitor numbers down -67% (a reduction of 1,186 average daily visitors).

Visitor numbers for April 2021 peaked on the Saturday of Easter weekend at 8,427 average daily visitors.



Average daily visitors for the YE April 2021 were down -26% on the YE April 2020. Average daily domestic visitors were -4% less than that of the YE April 2020. Daily international visitors were down an average of -67% compared to the previous 12-month period.

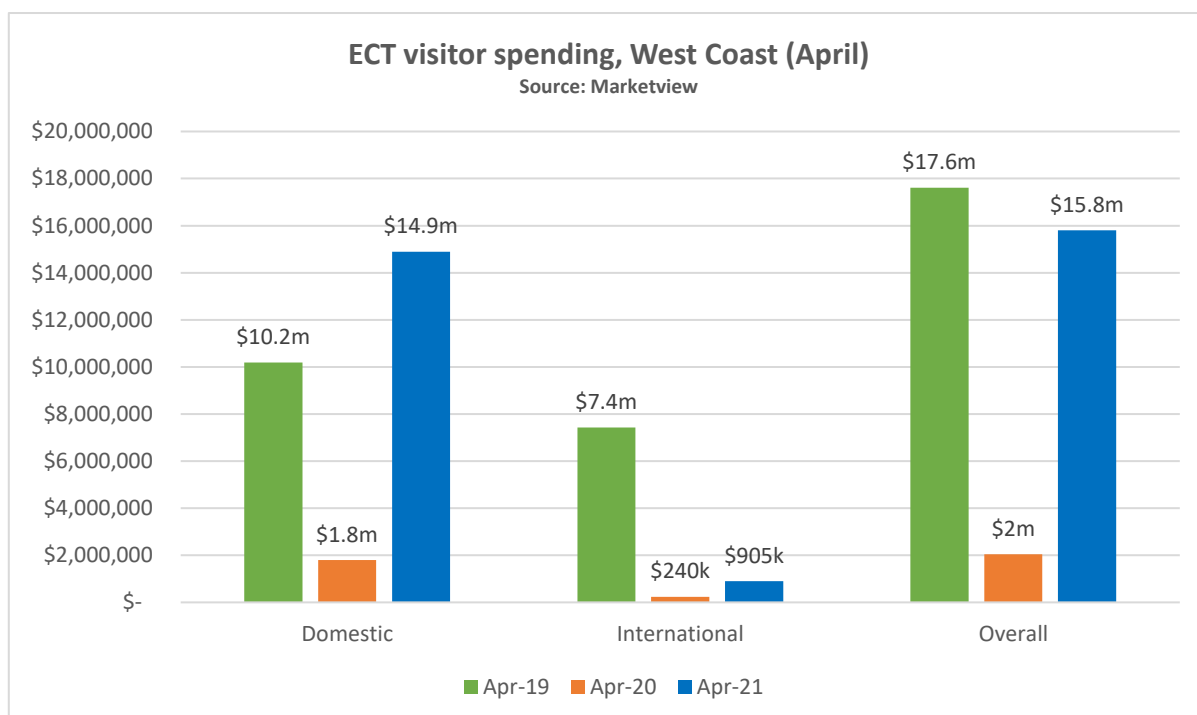


Visitor Spending

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.

Monthly ECT visitor spending in the West Coast RTO region in April 2021 was \$15.8m, down -10% from April 2019. ECT spending by domestic visitors made up \$14.9m of this, up 46% on April 2019. International ECT visitor spend for the month was \$905k, down -88% on April 2019.

Westland District made up \$6.6m or 42% of the regions monthly ECT visitor spend, followed by Buller District at \$4.7m or 30% and Grey District at \$4.5m or 28%.



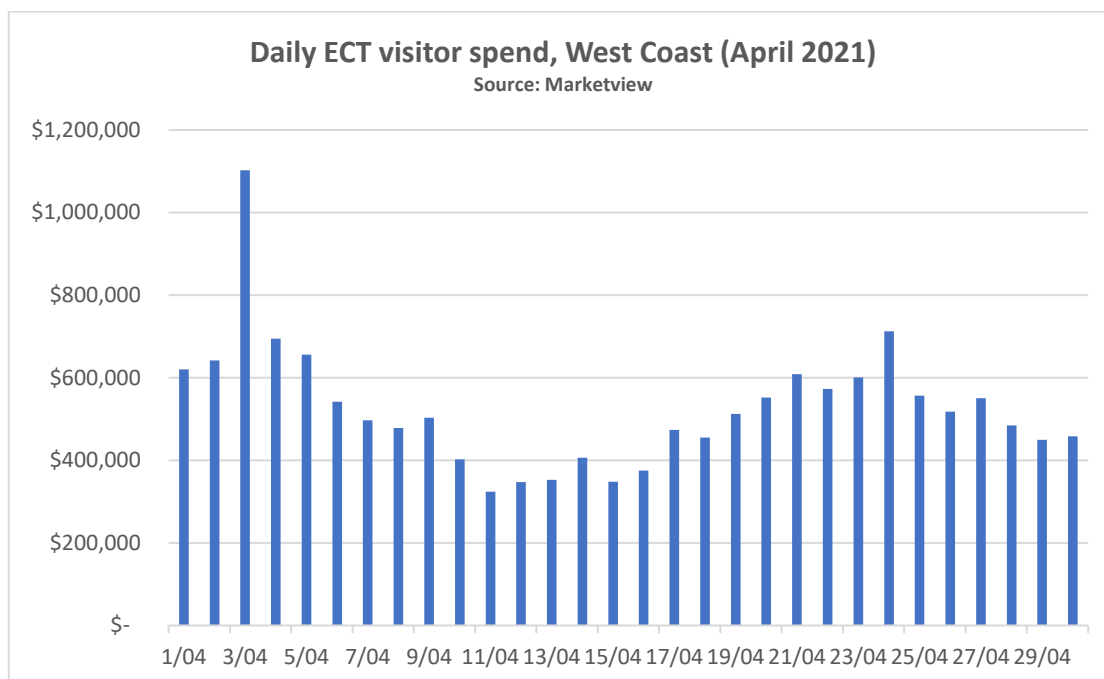
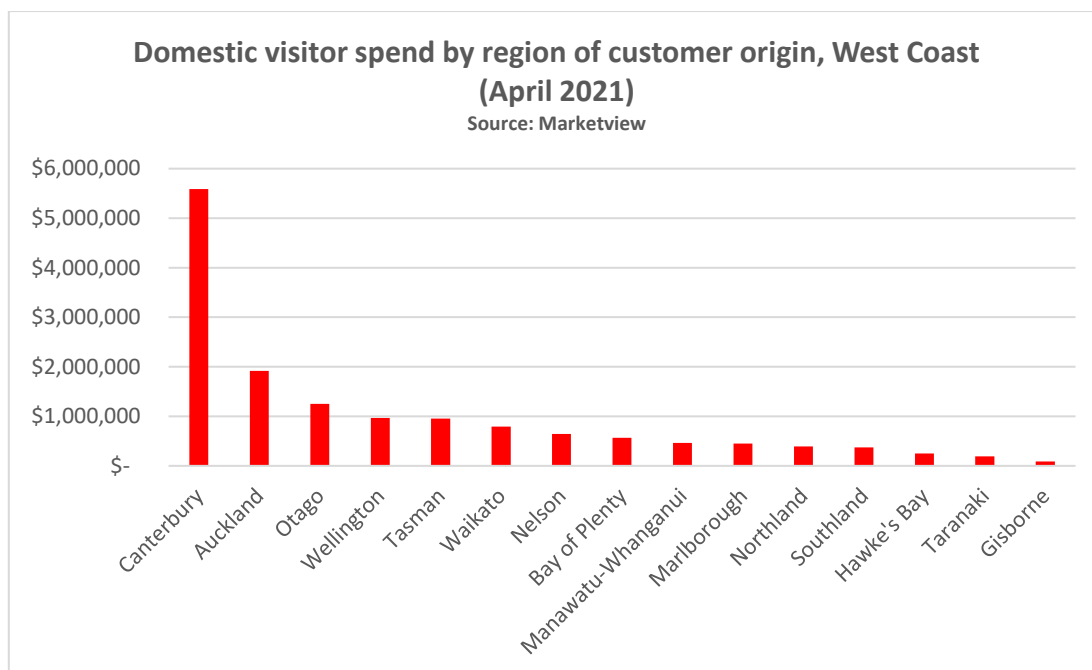
When looking at monthly ECT visitor spending ranked by share of nationwide spend, Development West Coast sat at 18th out of 36 RTOs with 1.5% of the total market.

When comparing average ECT transaction values by RTO, Development West Coast was 7th out of 36 with an average transaction value of \$51.70. The average ECT transaction value across all RTOs was \$48.54.

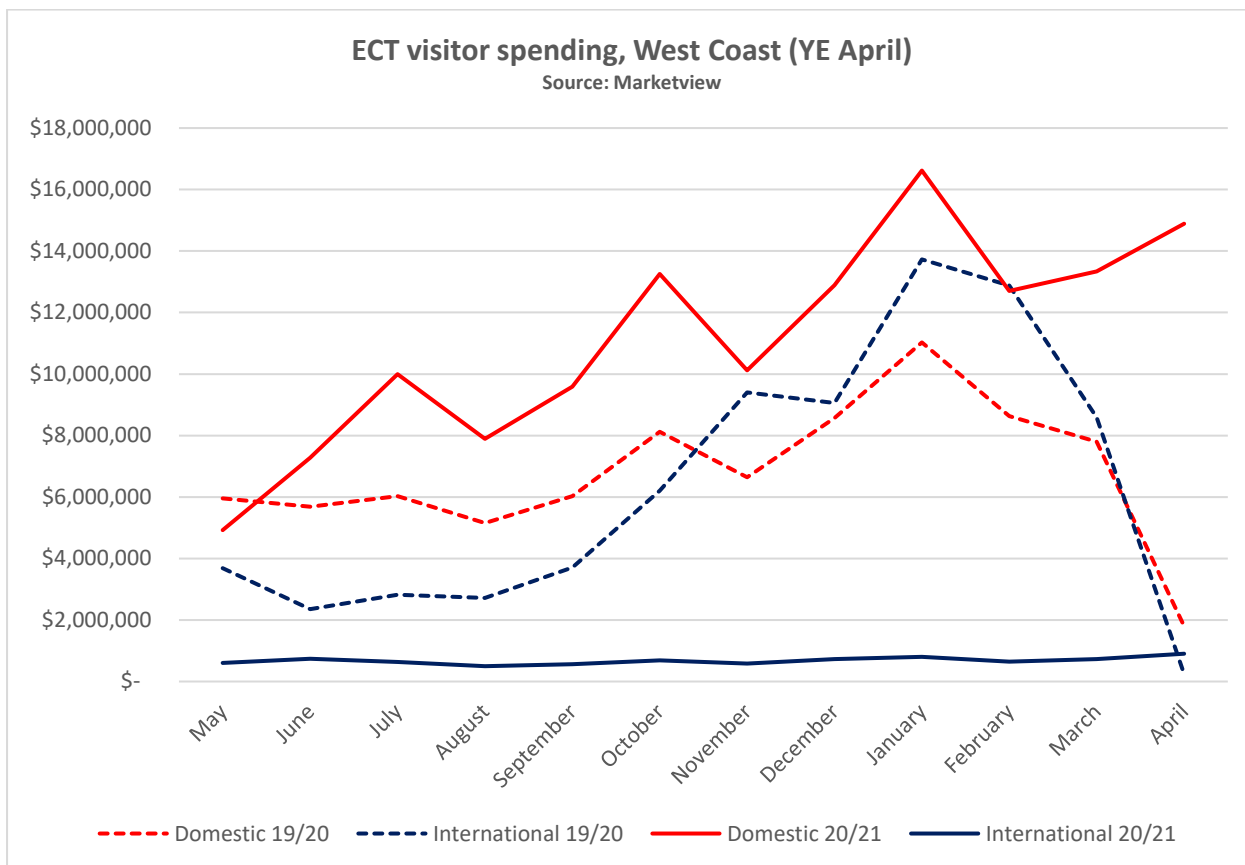
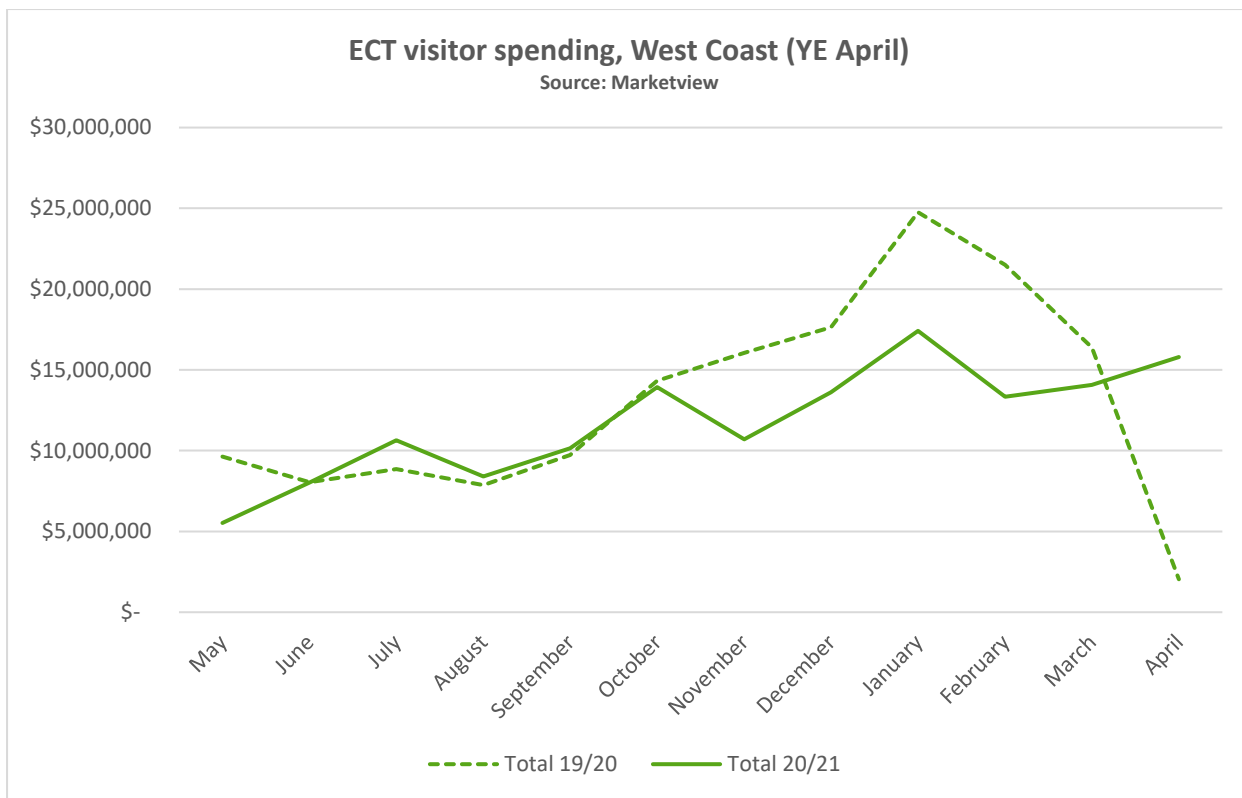
Average daily ECT visitor spending for April 2021 was \$529,581. Combining this with Dataventures average daily visitor numbers produces an estimated average daily ECT spend per visitor of \$120.58.

Daily ECT visitor spending was highest on Saturday the 3rd of April (Easter weekend) at \$1.1m.

Visitors from Canterbury made up the largest share of ECT visitor spending in the West Coast in April 2021, followed by visitors from Auckland, Otago, Wellington and Tasman.



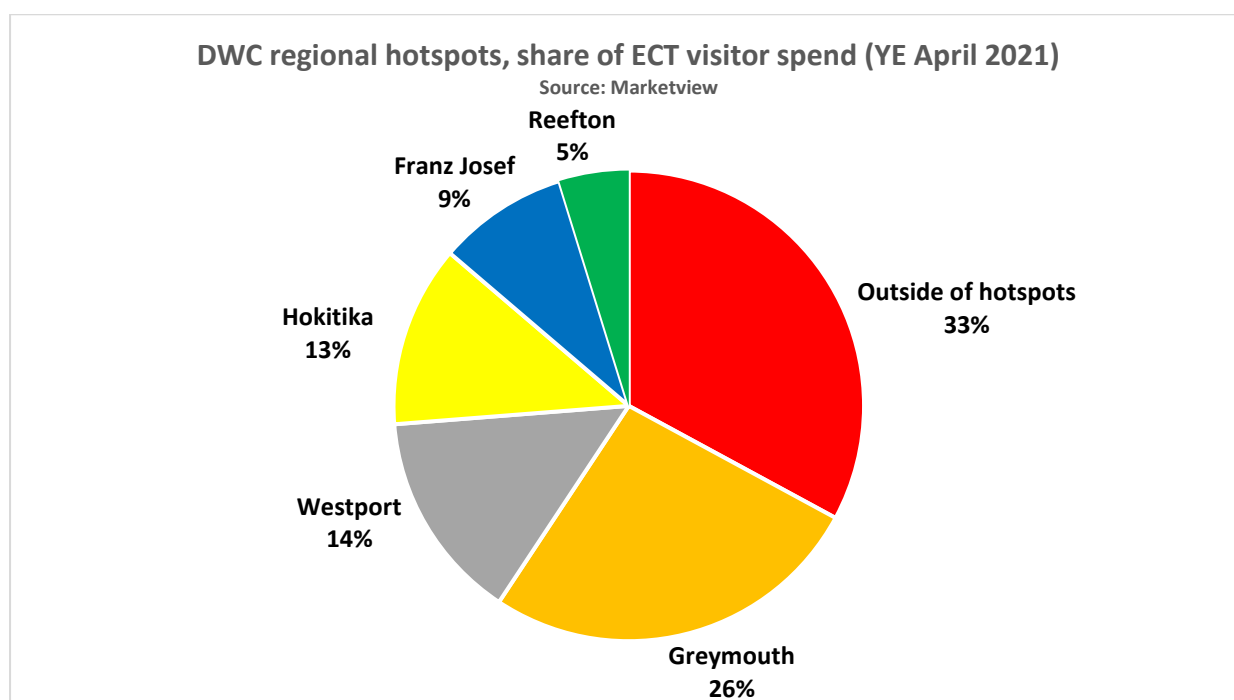
ECT visitor spending for the YE April 2021 was \$141.6m, down -10% or -\$15.2m from that of the YE April 2020. Domestic ECT visitor spending for the YE April 2021 was \$133.5m, up 64% or \$52m compared to the 12-month previous period. Monthly ECT spending by international visitors was \$8m, down -90% or \$67m on the YE April 2020.

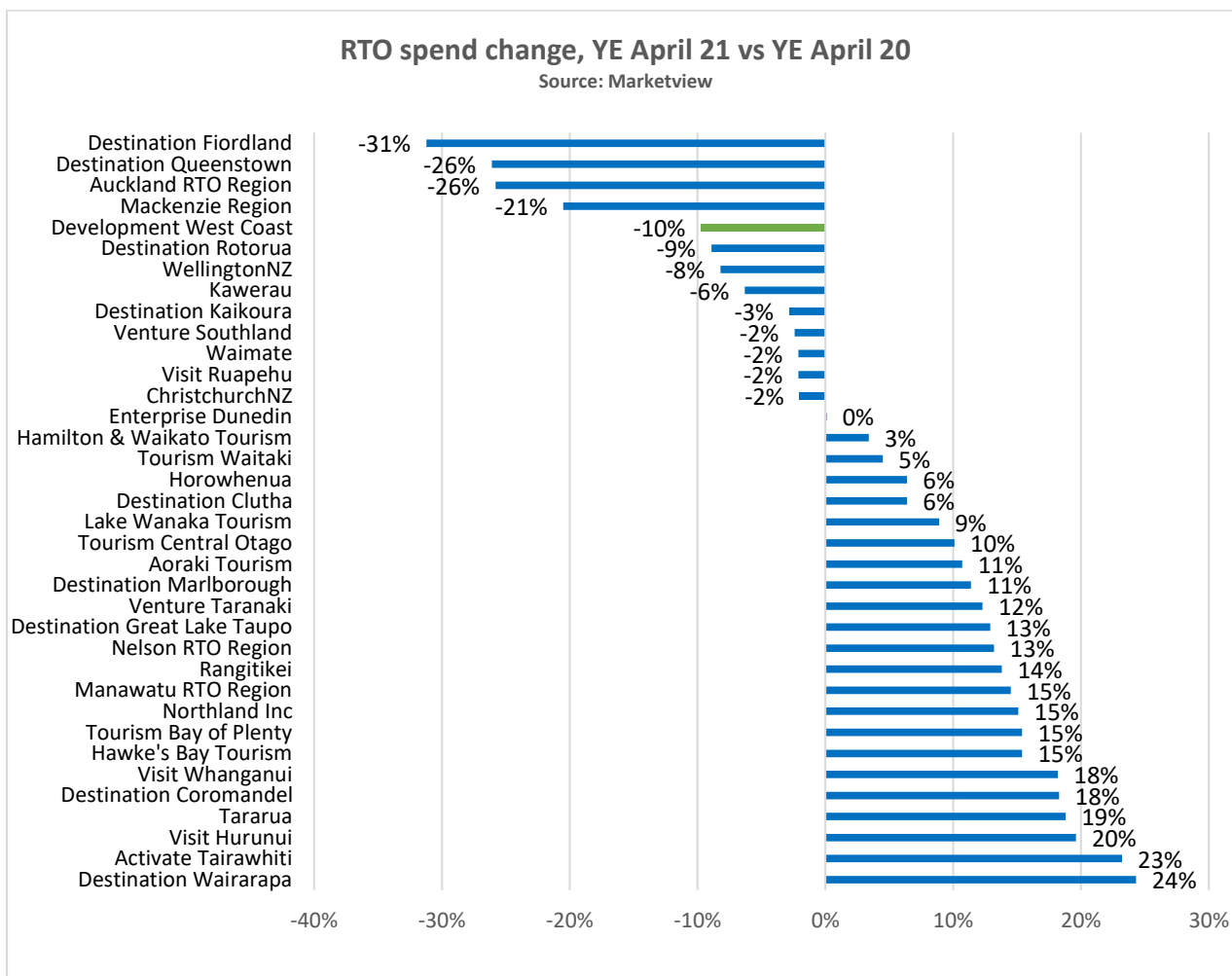
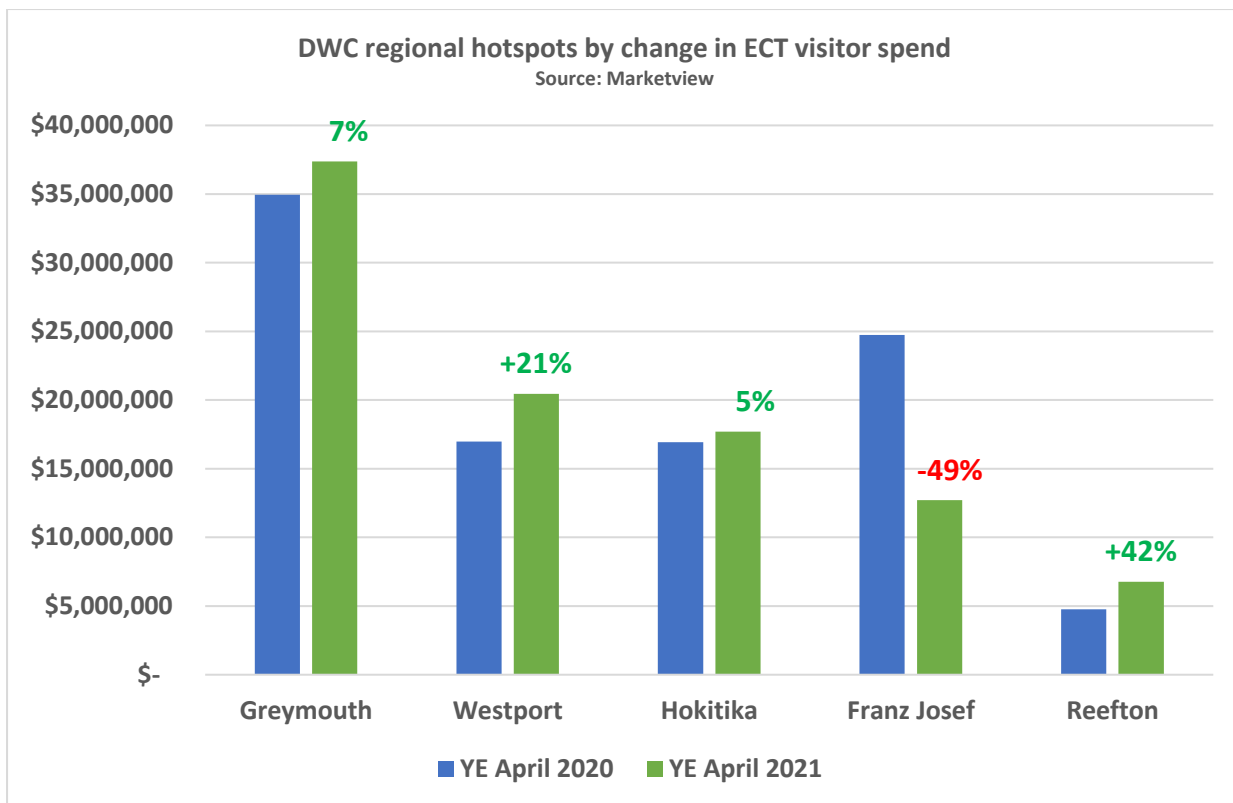


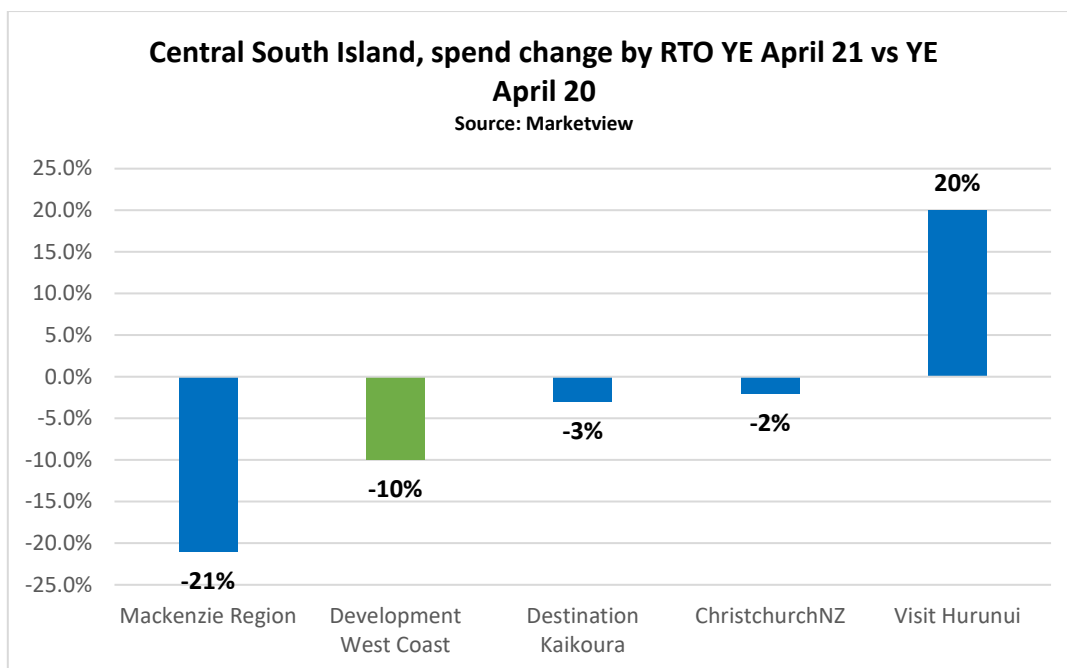
Regional Hotspots

The below table shows monthly and yearly spend figures for hotspot locations within the West Coast region. Spending within these hotspots made up **67%** of ECT visitor spending in the West Coast RTO area, both in the YE April 2021 and in the month of April 2021.

Hotspot	April 2021 spend	Change on April 2019	YE April 2021 spend	Change on YE April 2020
Westport	\$2.3m	+22%	\$20.5m	+21%
Reefton	\$778k	+52%	\$6.8m	+42%
Greymouth	\$3.8m	+5%	\$37.4m	+7%
Hokitika	\$1.6m	+9%	\$17.7m	+5%
Franz Josef	\$1.6m	-44%	\$12.67m	-49%

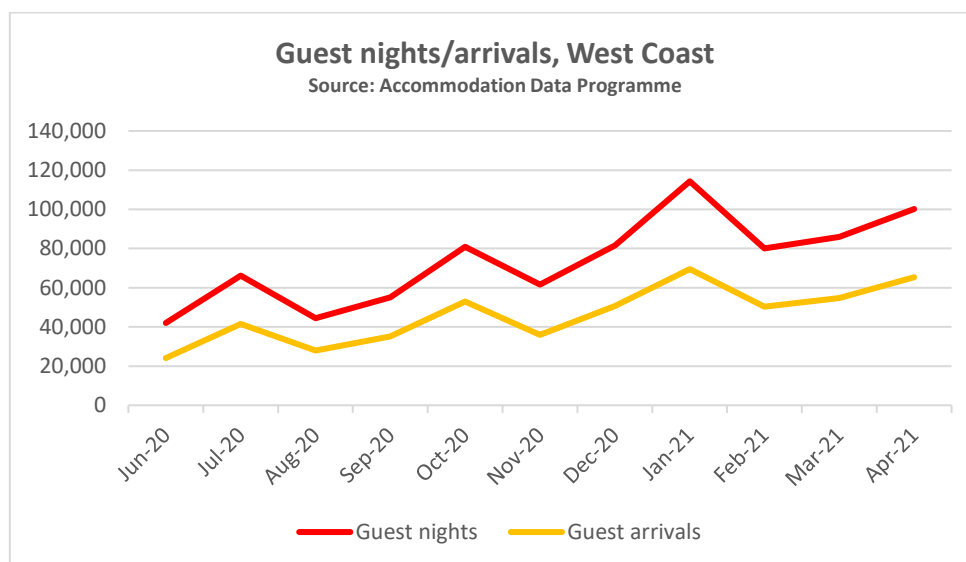




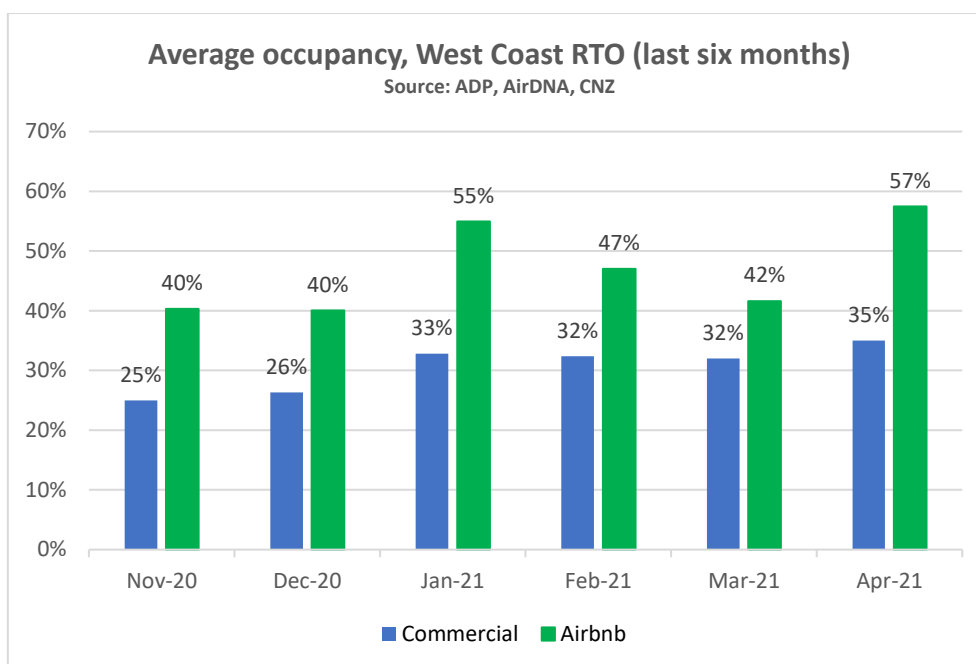


Accommodation

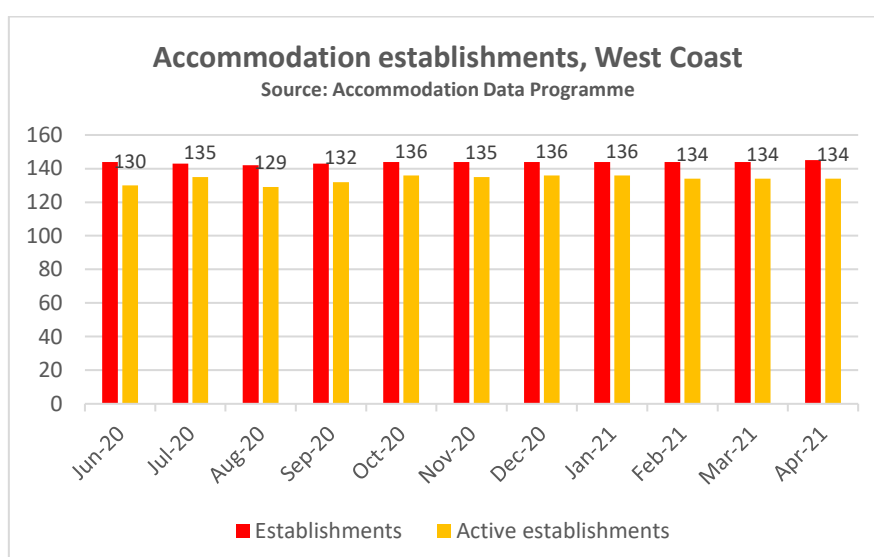
65,300 recorded guest arrivals spent 100,100 guest nights in commercial accommodation in the West Coast RTO area in April 2021. Of these guest nights, 54% were spent in the Westland District, 24% in Buller District and 23% in Grey District. Guest nights spent on the West Coast made up 3.3% of total guest nights in NZ for the month.



The average occupancy rate for the region was 35%. Average occupancy was highest in Grey District at 40%, followed by Westland District at 34% and Buller District at 33%. This was below the national average of 47% occupancy. The average length of stay was 1.6 nights, also below the national average of 2.1 nights.



Of the 145 registered accommodation establishments in the region, 134 identified as active.



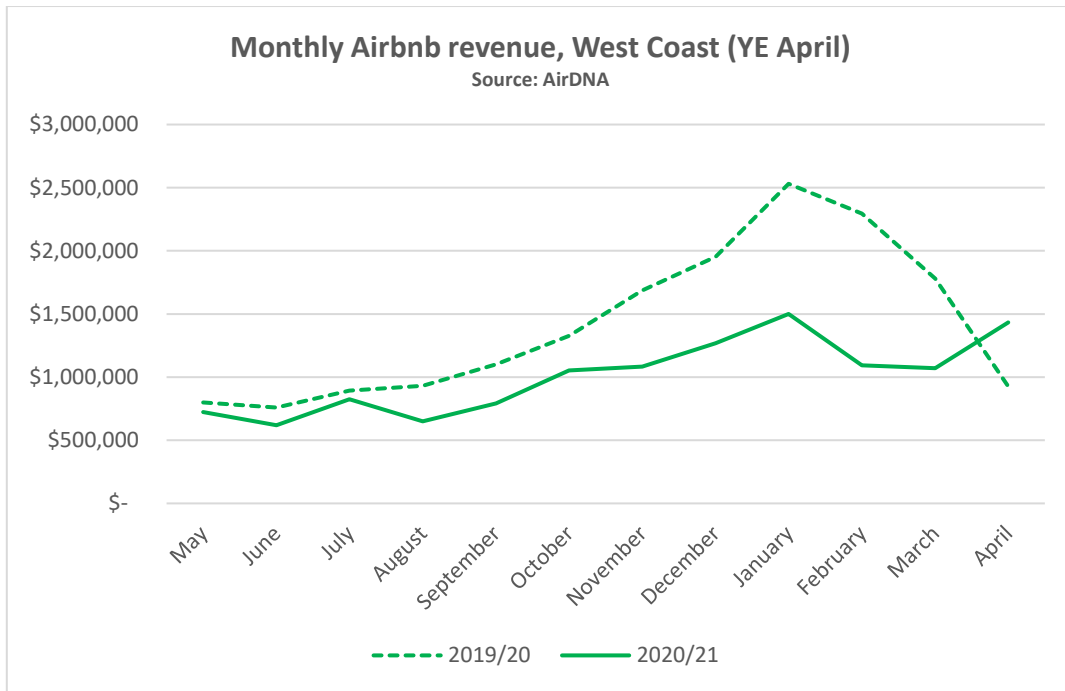
Airbnb

A total of 653 active rentals in the West Coast region were listed on Airbnb in April 2021. Of these, 45% were in Westland District, 35% in Buller District and 20% in Grey District. The average Airbnb occupancy rate in the region in April 2021 was 57%.

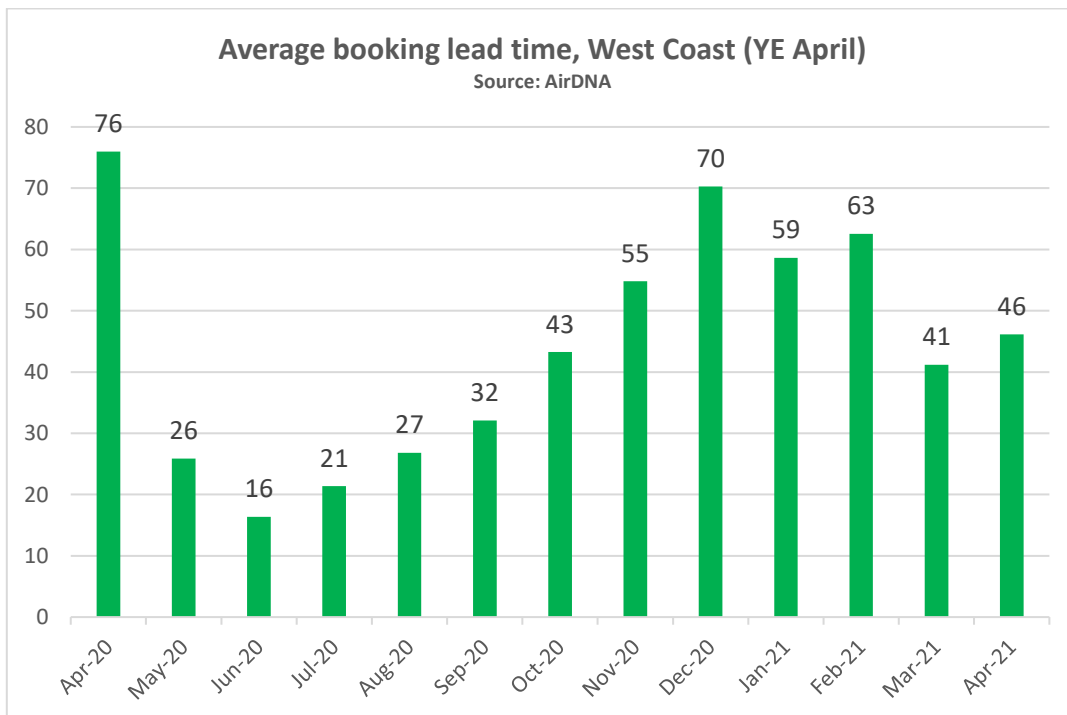
Average daily rates by listing type are listed below. Percentages show the change in ADR in April 2021 from March 2021 (if any).

Average daily rates by listing type, West Coast Airbnb (April 2021)					
District	Entire home		Private room		Shared room
Westland District	\$159	-0.4%	\$140	-7%	\$39 +3%
Buller District	\$157	-2%	\$97	+2%	\$34 +2%
Grey District	\$132	-1%	\$85	-12%	N/A

Airbnb revenue for the month totaled at \$1.4m in the West coast region, down -4% from April 2019 and up 55% from April 2020. The top earning properties in the region for April 2021 were Drifting Sands in Hokitika; Rainforest Retreat in Franz Josef and rooms within Hokitika Fire Station Boutique Accommodation.



The average booking lead time for West Coast Airbnb listings booked for April 2021 was 46 days. This was significantly lower than the average booking lead time for April 2020, which was 76 days. Booking lead times were longest for listings in the Buller District at 60 days; followed by 40 days in Grey District and 38 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 (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 April 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 five regions that users were 'pinged' during the month of April before or after visiting the West Coast region.

Top five 'prior' regions- West Coast April 2021	
Christchurch	37%
Nelson Tasman	28%
Wanaka	20%
Queenstown	2%
Central Otago	2%

Top five 'next' regions- West Coast April 2021	
Christchurch	37%
Nelson Tasman	30%
Wanaka	19%
Marlborough	2%
Queenstown	2%

By district:

Looking at prior and next regions for Triptech users travelling through districts on the West Coast in April 2021 shows that there was a fairly even split between those users travelling north to south and those travelling south to north. Users travelling to and from the eastern side of the South Island were proportionally lower.

In the Buller and Grey Districts, a higher proportion of visitors came in from the south, with 38% travelling into Buller from Grey and 44% into Grey from Westland (vs 32% and 34% from the north respectively). In Westland District (with a higher number of Triptech visitors overall) a higher proportion of users travelled in from the north with 35% coming in from Grey. This compares to the 29% of users who travelled from Queenstown.

The proportion of users 'pinged' on the eastern side of the South Island prior to the West Coast was lower in all districts, with 19% located in Hurunui prior to visiting Buller District; 7% in Selwyn prior to visiting Grey District and 17% in Selwyn prior to visiting Westland District.

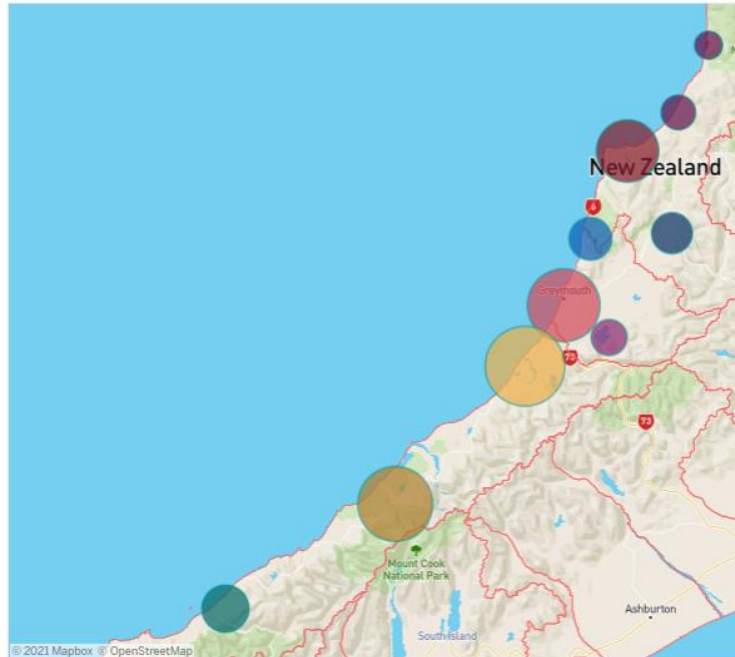
In Buller and Grey Districts there was a fairly even split between those who travelled north after visiting each district and those who travelled south. 36% left Buller and went north into Tasman District, while 32% went south into Grey. Of those who visited Grey District, 39% travelled north into Buller and 38% went south into Westland. Those travelling east were again proportionally lower, with 20% located in the Hurunui after leaving Buller and 6% located in Selwyn after leaving Grey. A

higher proportion of users travelled north after leaving Westland District, with 39% travelling north into Grey vs 28% who travelled to Queenstown. 17% went east into Selwyn from Westland.

Overnight stay locations

The below map shows popular overnight stay locations for users in April 2021. Clusters were detected at the following locations: Hokitika (21%); Franz Josef (19%); Greymouth (18%); Westport (13%); Haast (7%); Punakaiki (6%); Reefton (6%); Moana/Lake Brunner (4%); between Hector and Seddonville (5%); and Karamea (3%).

Overnight Stay Clusters



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

