

West Coast Visitor Trends March 2021

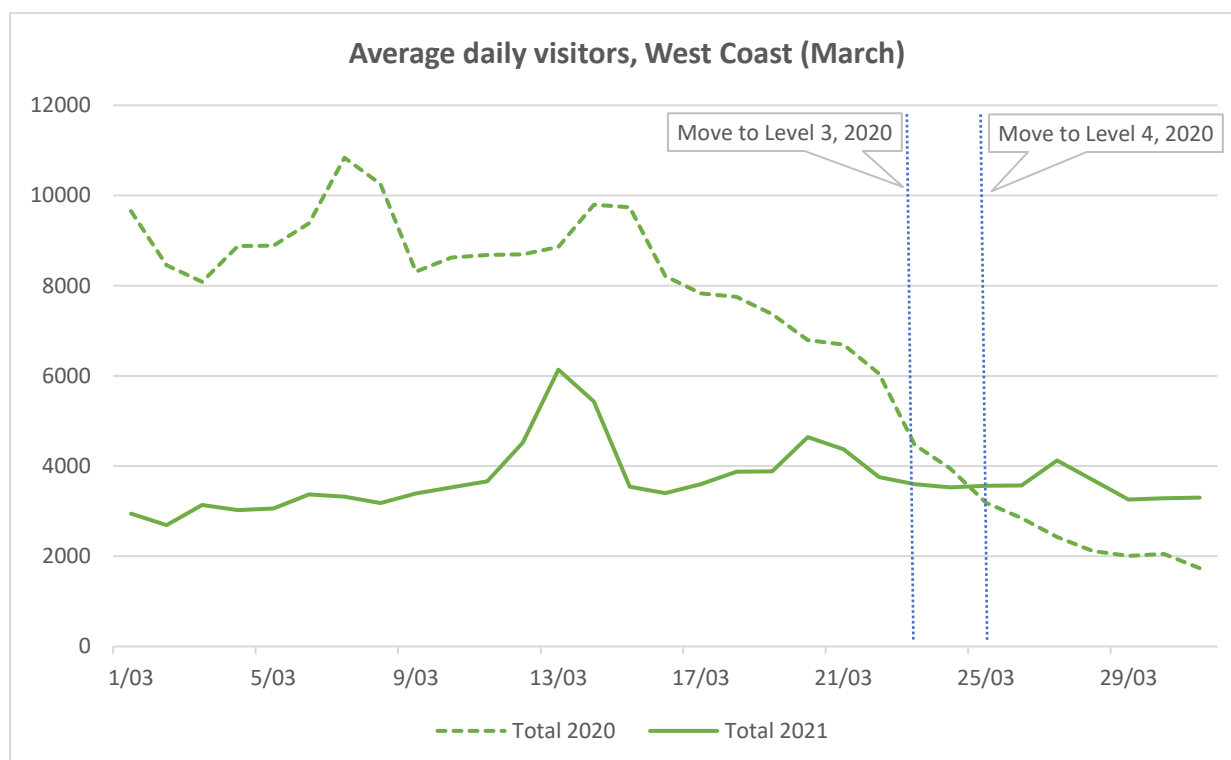
Key figures March 2021

Average daily visitors: 3,690
 Monthly ECT visitor spend: \$14.1m
 Average daily ECT spend: \$453k
 Average daily ECT spend per visitor: \$123
 Average length of stay: 1.6 nights
 Accommodation occupancy rate: 32%
 Airbnb occupancy rate: 42%

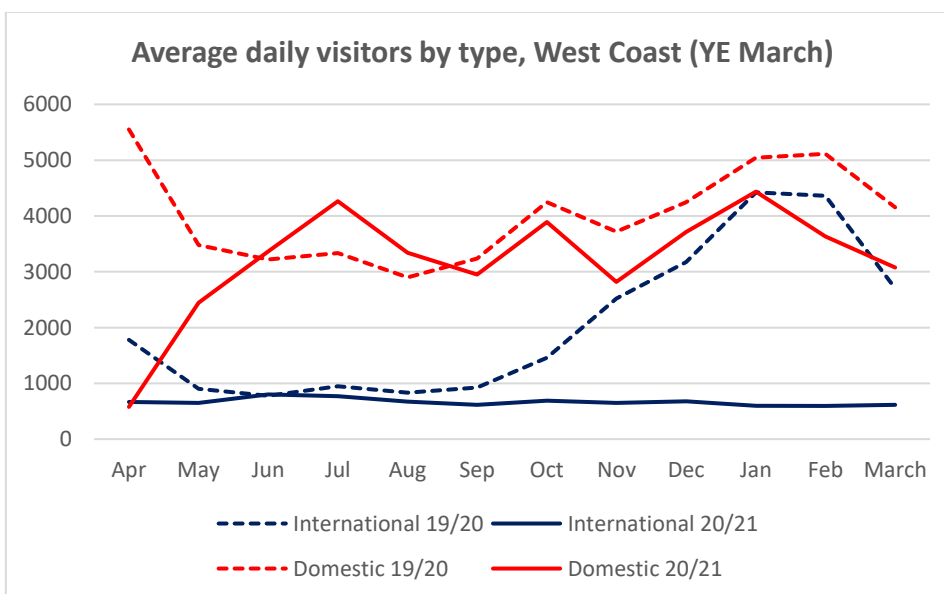
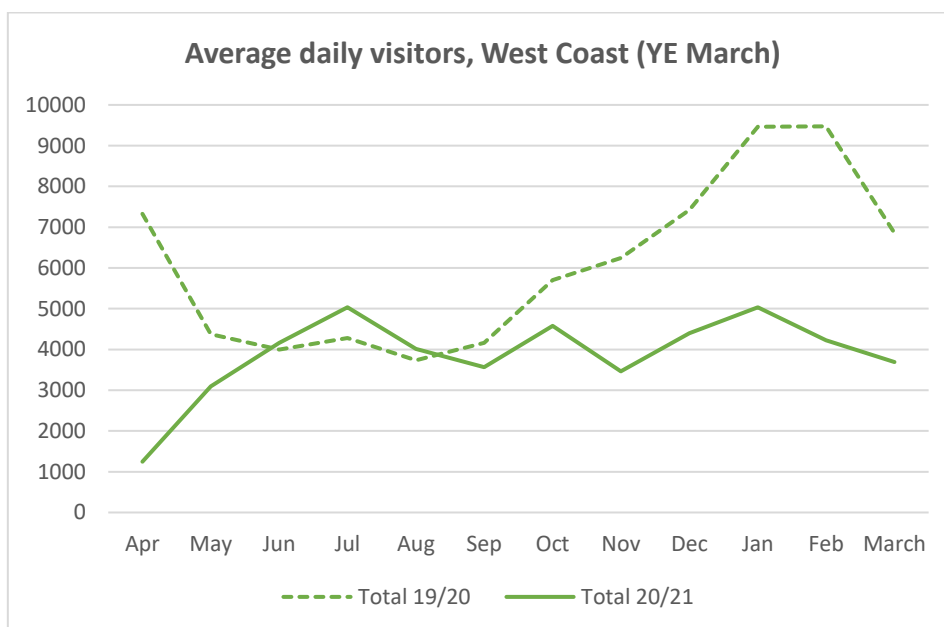
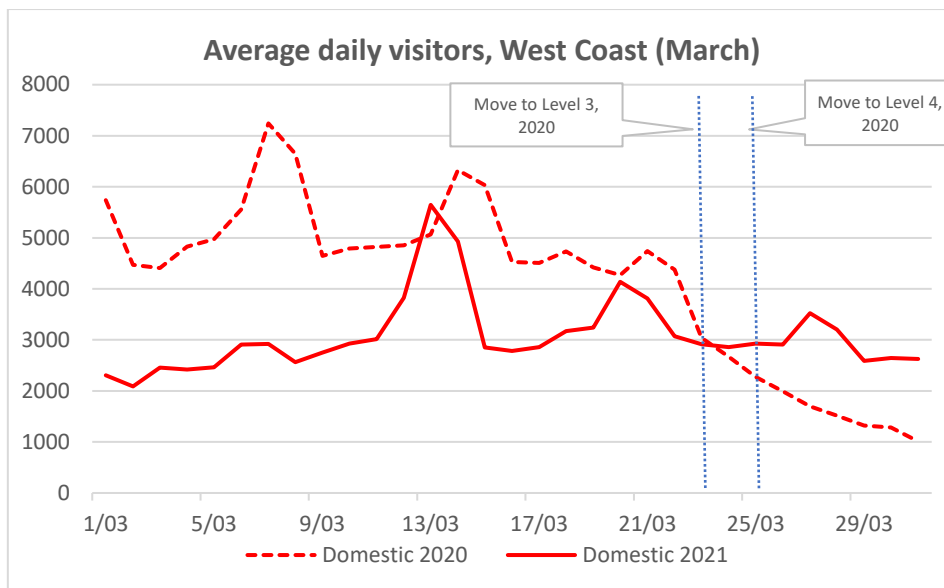
Visitor numbers

Dataventures figures capture the average number of visitors in a region each day at midday. An average of 3,690 visitors were in the West Coast region per day in March 2021. This was -46% less than in March 2020, equivalent to a reduction of 3,169 average daily visitors. Domestic visitors made up 3076 of these visitors, down -26% from March 2020. International visitors averaged at 614 per day, down -77% from March 2020. This represents an average reduction of 2091 visitors each day.

Average daily visitors peaked on the 13th of March at 6,138. This date coincided with the Hokitika Wildfoods Festival.



Average daily visitors for the YE March 2021 were down -36% on the YE March 2020. Average daily domestic visitors were -26% less than that of the YE March 2020. Daily international visitors for the YE March 2021 were down an average of -68% compared to the previous 12-month period.



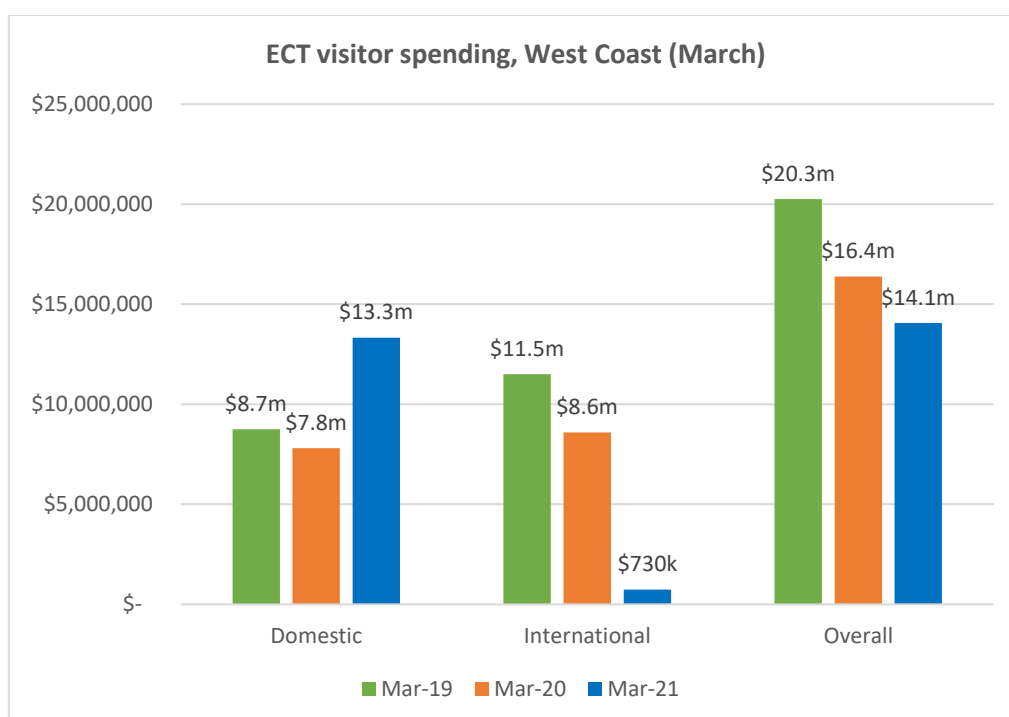
Visitor Spending

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 comparisons to both March 2019 and March 2020 will be included as figures from March 2020 are likely to be affected by behavioral changes due to COVID-19 and cannot be relied on as a representation of a typical month.

Monthly ECT visitor spending in the West Coast RTO region in March 2021 was \$14.1m, down -31% from March 2019 and down -14% from March 2020. ECT spending by domestic visitors made up \$13.3m of this, up 52% on March 2019 and up 71% on March 2020. International ECT visitor spend for the month was \$731k, down -94% from March 2019 and down -91% from March 2020.

Westland District made up \$5.6m or 40.1% of the regions monthly ECT visitor spend, followed by Buller District at \$4.3m or 30.8% and Grey District at \$4.1m or 29.1%.

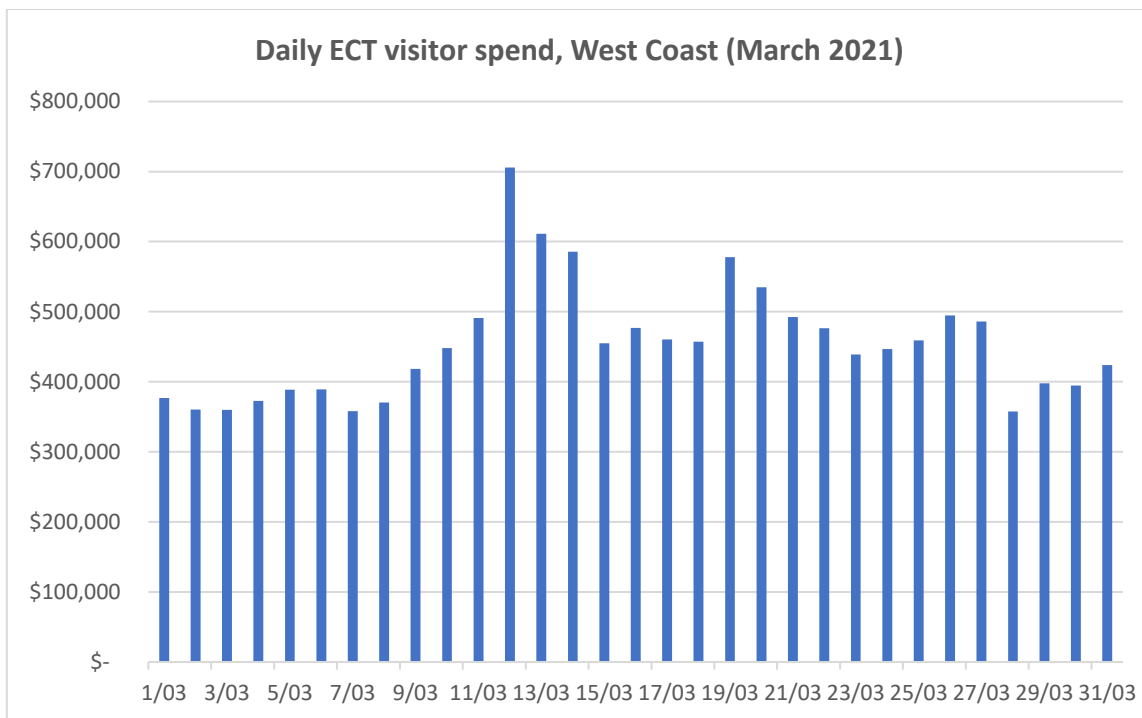


When looking at monthly ECT visitor spending ranked by share of nationwide spend, Development West Coast sat at 19th out of 36 RTOs with 1.6% of the total market.

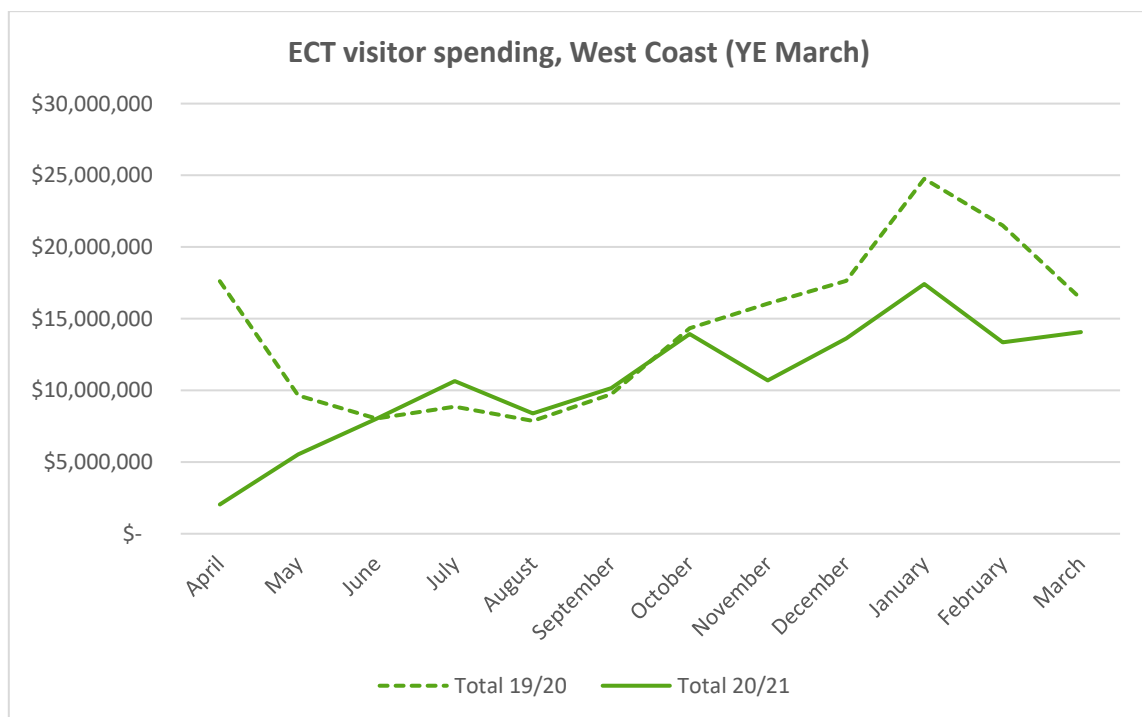
When comparing average ECT transaction values by RTO, Development West Coast was 14th out of 36 with an average transaction value of \$49.75. The average ECT transaction value across all RTOs was \$47.34.

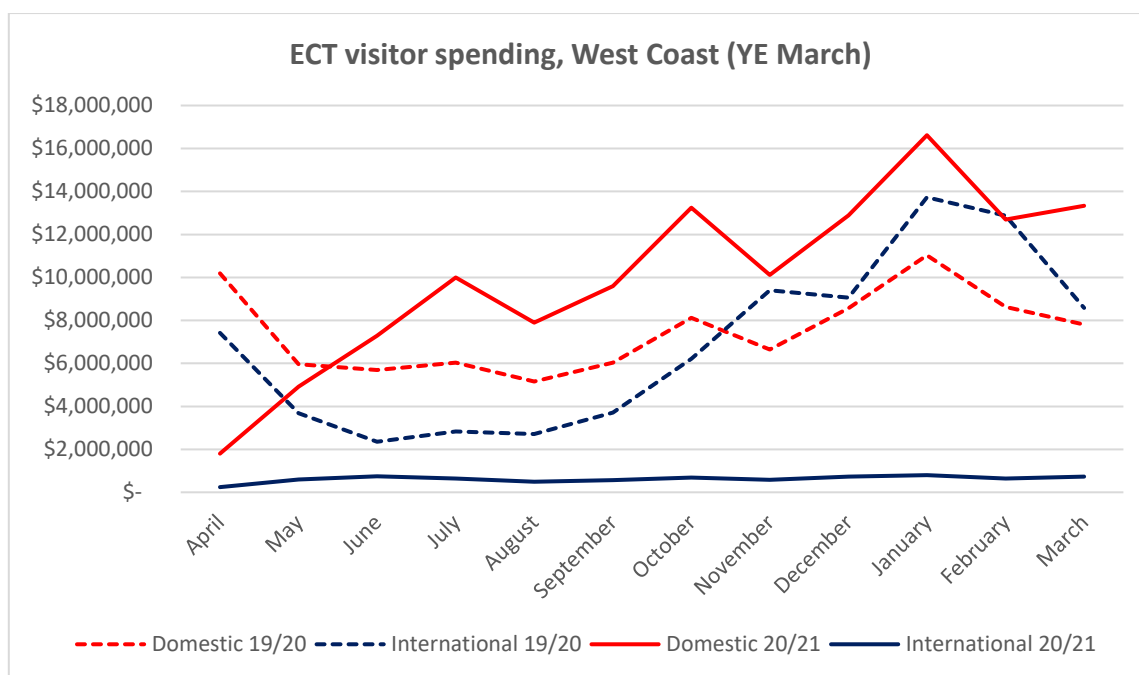
Average daily ECT visitor spending for March 2021 was \$453,691. Combining this with Dataventures average daily visitor numbers produces an average daily ECT spend per visitor of \$122.95.

Daily ECT visitor spending was highest on March 12th at \$705,740. On this date, average daily ECT spend per visitor increased to \$156.21.



ECT visitor spending for the YE March 2021 was \$127.9m, down -26% or -\$44m from that of the YE March 2020. Domestic ECT visitor spending for the YE March 2021 was \$120.4m, up 34% compared to the previous period. This equates to an increase of \$30.5m. ECT spending by international visitors was \$7.5m, down -91% on the YE March 2020. This represents a reduction of -\$75.1m in international ECT visitor spending compared to the previous 12-month period.





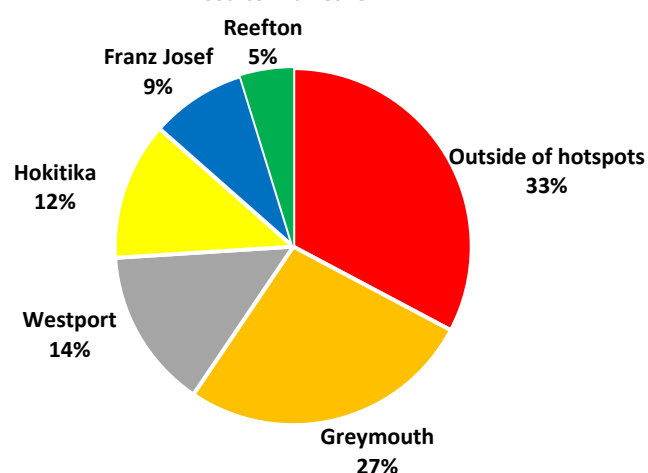
Regional Hotspots

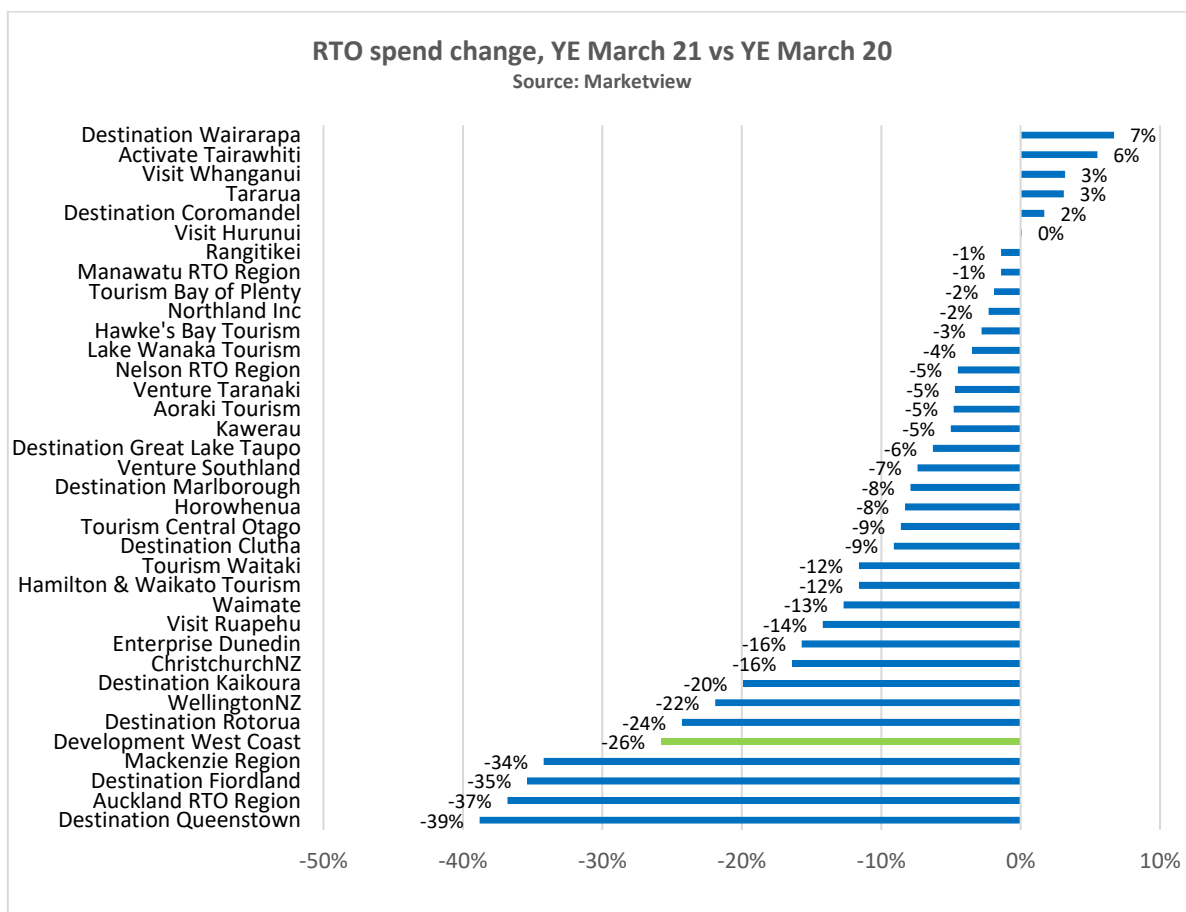
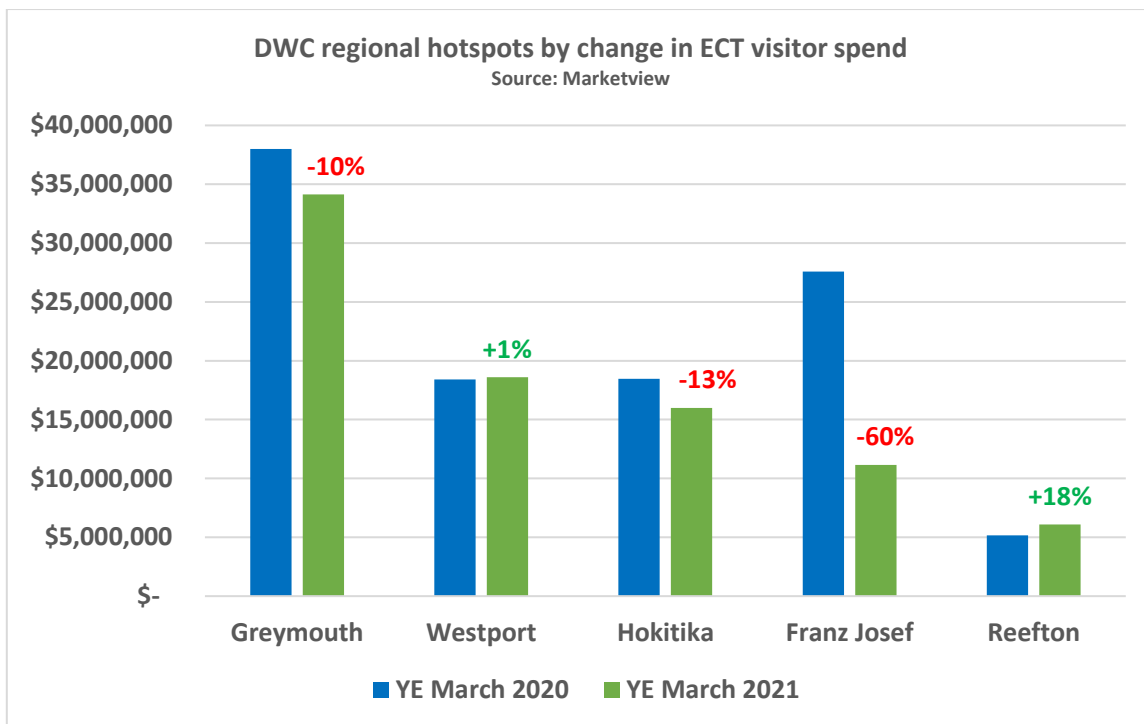
The below table shows monthly and yearly spend figures for hotspot locations within the West Coast region. Spending within these hotspots made up **67%** of ECT visitor spending in the West Coast RTO area, both in the YE March 2021 and in March 2021.

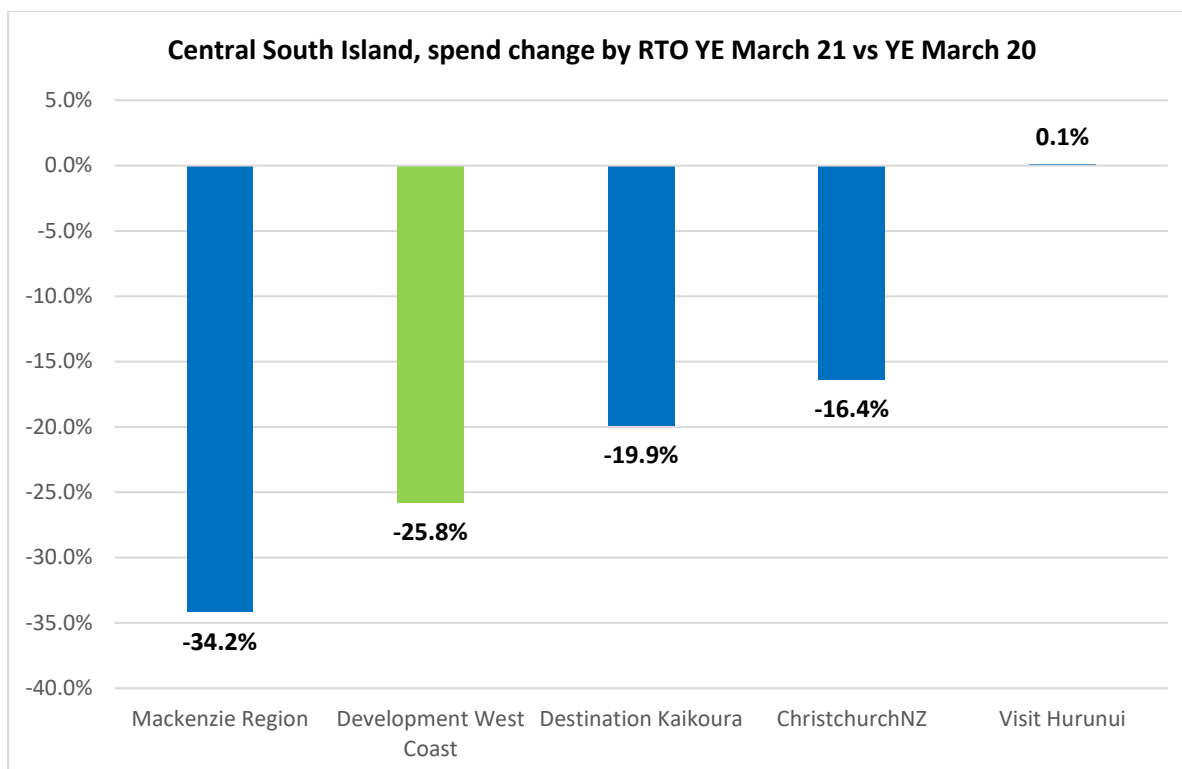
Hotspot	March 2021 spend	Change on March 2019	Change on March 2020	YE March 2021 spend	Change on YE March 2020
Westport	\$2.15m	+10%	+24%	\$18.6m	+1%
Reefton	\$782k	+58%	+55%	\$6.1m	+18%
Greymouth	\$3.6m	-8%	+9%	\$34.1m	-10.2%
Hokitika	\$1.8m	-22%	+1%	\$16m	-13.4%
Franz Josef	\$1.2m	-70%	-57%	\$11.6m	-60%

DWC regional hotspots, share of ECT visitor spend (YE March 2021)

Source: Marketview





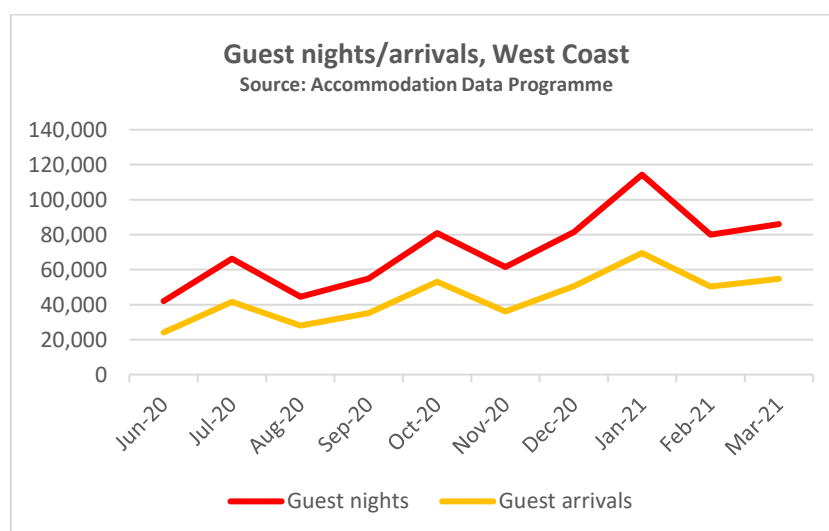


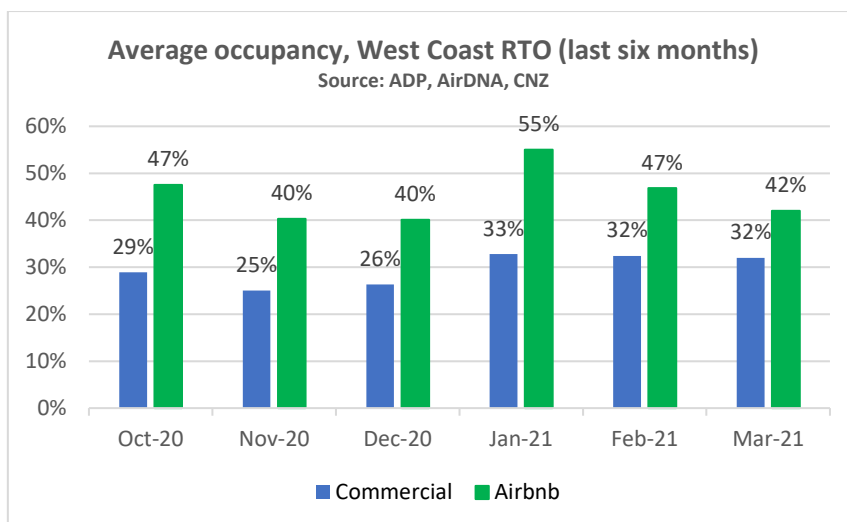
Accommodation

Due to a lack of commercial accommodation data, year-on-year comparisons are not possible.

54,300 recorded guest arrivals spent 86,000 guest nights in commercial accommodation in the West Coast RTO area in March 2021. Of these guest nights, 55% were spent in the Westland District, 23% in Grey District and 22% in Buller District. Guest nights spent on the West Coast made up 5% of total guest nights in NZ for the month.

The average occupancy rate for the region was 32.2%. Average occupancy was highest in Grey District at 36%, followed by Westland District at 32% and Buller District at 31%. This was below the national average of 41.3%. The average length of stay was 1.6 nights, also below the national average of 2.2 nights.





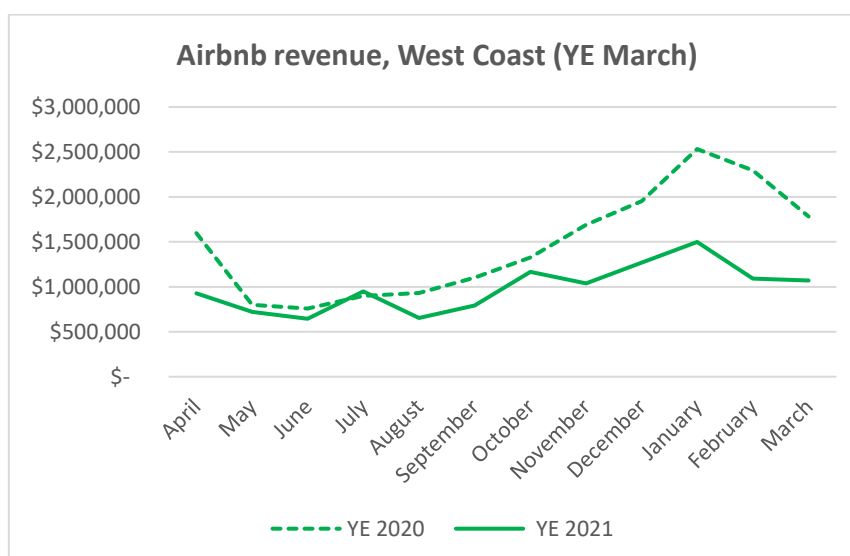
Airbnb

A total of 686 active rentals in the West Coast region were listed on Airbnb in March 2021. Of these, 45% were in Westland District, 34% in Buller District and 21% in Grey District. The average Airbnb occupancy rate in the region in March 2021 was 42%.

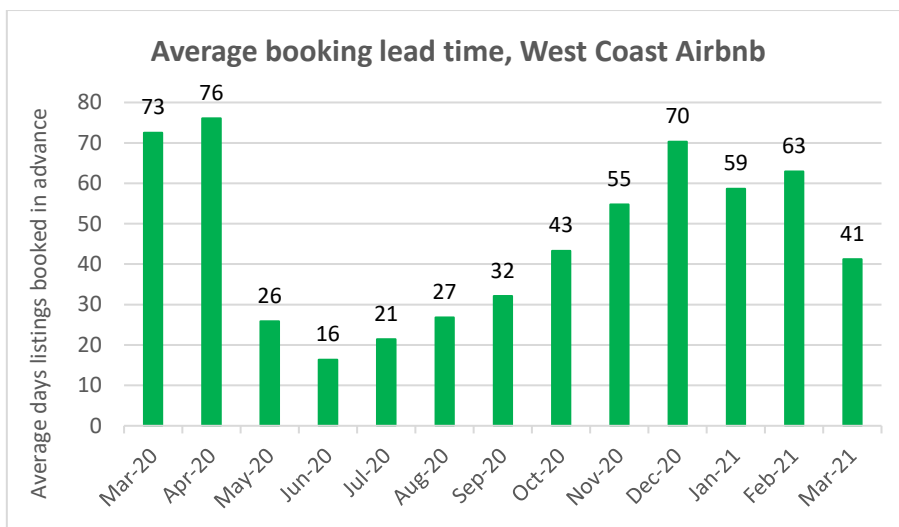
Average daily rates by listing type are listed below. Percentages show the change in ADR in March 2021 from February 2021 (if any).

Average daily rates by listing type, West Coast Airbnb (March 2021)				
District	Entire home		Private room	Shared room
Westland District	\$160	+0.7%	\$150	\$38 +3%
Buller District	\$160	+1%	\$95 +2%	\$33 +3%
Grey District	\$133	-2%	\$97 -7%	N/A

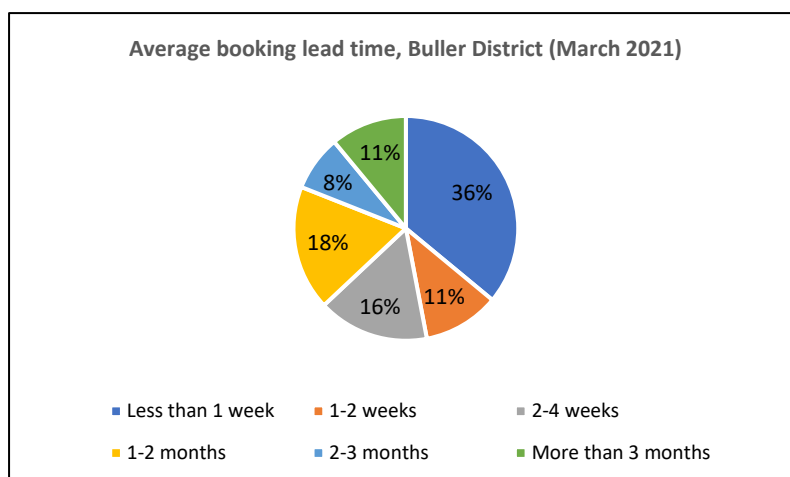
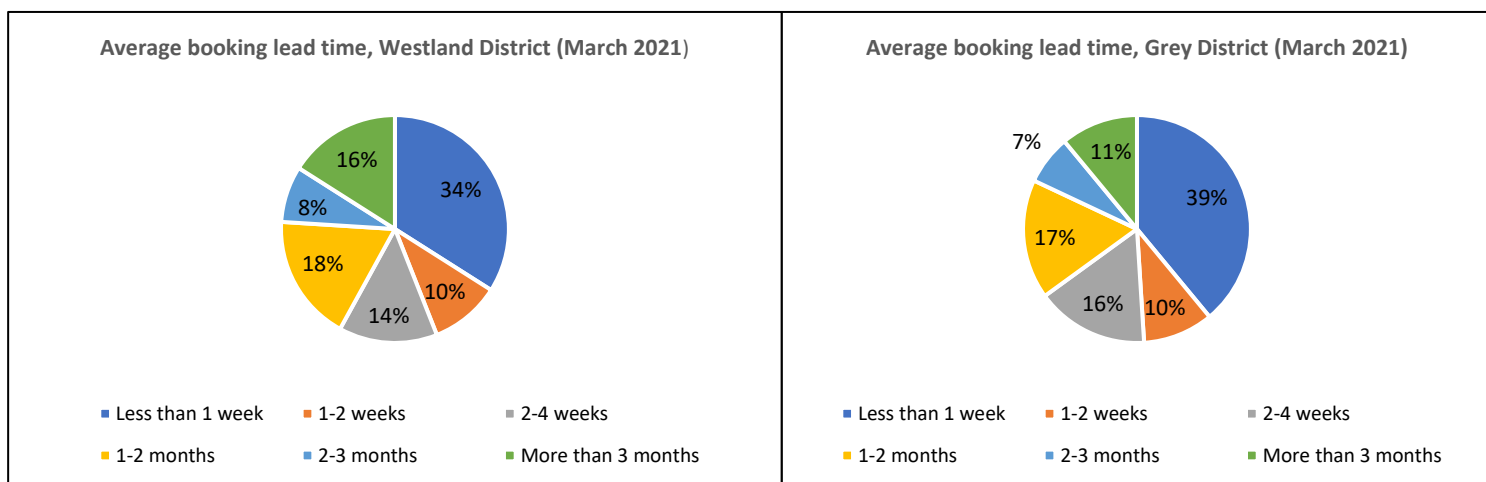
Airbnb revenue for the month totaled at \$1.1m in the West coast region, down -40% from March 2020. Declines in monthly revenue compared to March last year were largest in Westland District, with revenue falling by -54%. Revenue fell by -34% in Grey District and -12% in Buller District. The top earning properties in the region for March 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 March 2021 was 41 days. This was significantly lower than the average booking lead time for March 2020, which was 73 days. Booking lead times were longest for listings in the Westland District at 47 days; followed by 37 days in Grey District and 36 days in Buller District.



A breakdown of average booking lead times by district is shown in the charts below.



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.

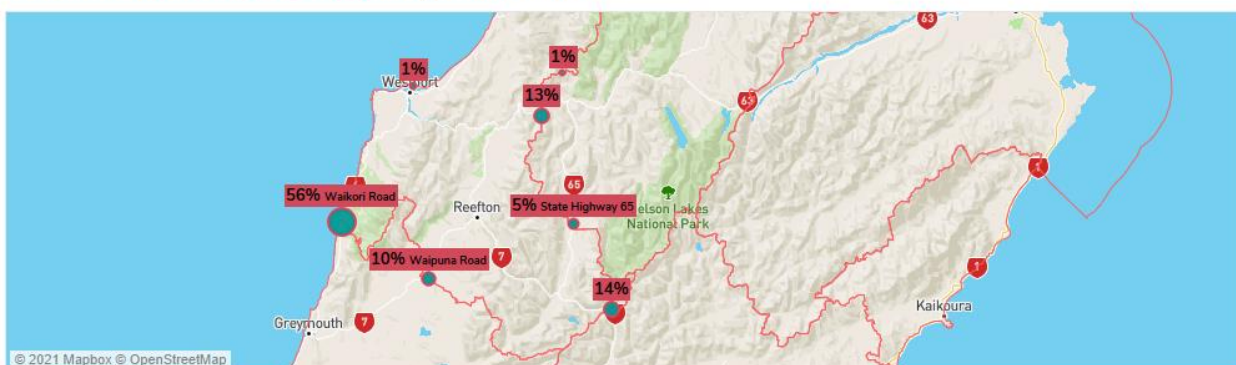
Traffic flow patterns

Traffic flow shows movement of TripTech users as they travelled between districts in March 2021.

Buller District

Of TripTech users who visited Buller District, 14% entered from the northeast via SH6 near Murchison and 5% from SH65. 14% entered via Lewis Pass on SH7. 66% entered from Grey District, with 56% of these users travelling via the coast on SH6 and 10% via Waipuna Road. Traffic flows out of Buller District followed a similar pattern, with 6% more users travelling north via SH6 and 4% more users travelling via Lewis Pass. 3% less travelled north via SH65, and 7% less travelled south into Grey District.

User Inflow for Buller District along Road Network



User Outflow for Buller District along Road Network



Grey District

47% of users travelling into Grey District came from Buller via SH6, with an additional 6% travelling in via SH7 through Ikamatua. 48% of users entered from Westland District, with 35% of these users travelling via the coast on SH6; 3% on Kumara-Inchbonnie Road and 10% on SH73. Exit routes show that when users left the district, 63% travelled north into Buller District with 58% exiting via SH6 and 5% via SH7. 36% travelled south out of the district, with 25% exiting south via SH6, 2% via Kumara-Inchbonnie Road and 9% via SH73.

User Inflow for Grey District along Road Network



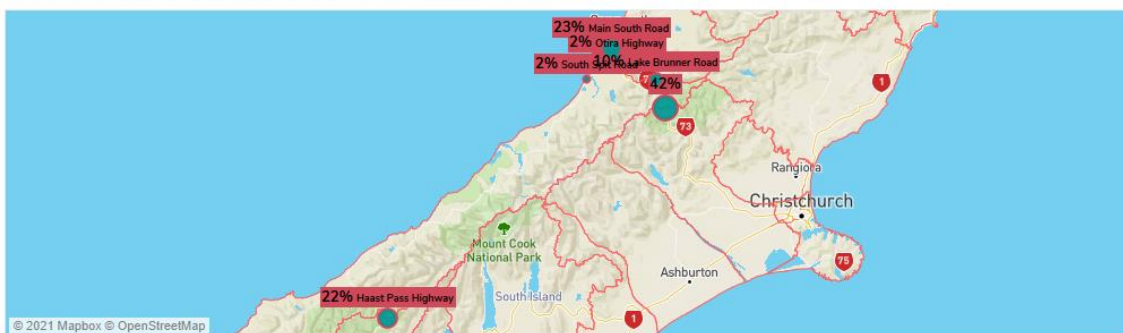
User Outflow for Grey District along Road Network



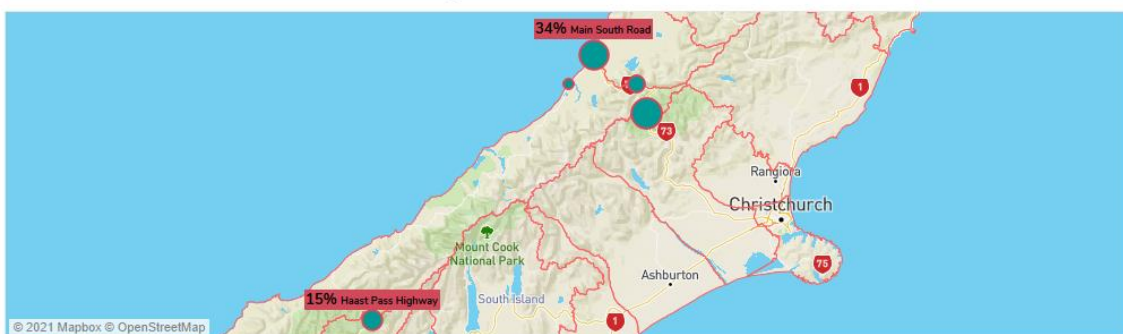
Westland District

Approximately 27% of users entered Westland District from the north via SH6, with an additional 10% entering via Lake Brunner Road. 42% travelled inland through Arthurs Pass on SH73. The remaining 22% of users entered the district from the south via Haast Pass. Traffic flow patterns show that users travelling out of Westland District tended to travel inland via Arthurs Pass (37%), north (37% via SH6) or northeast (10% via Lake Brunner Road). Users travelling via Haast Pass fell to 15%.

User Inflow for Westland District along Road Network



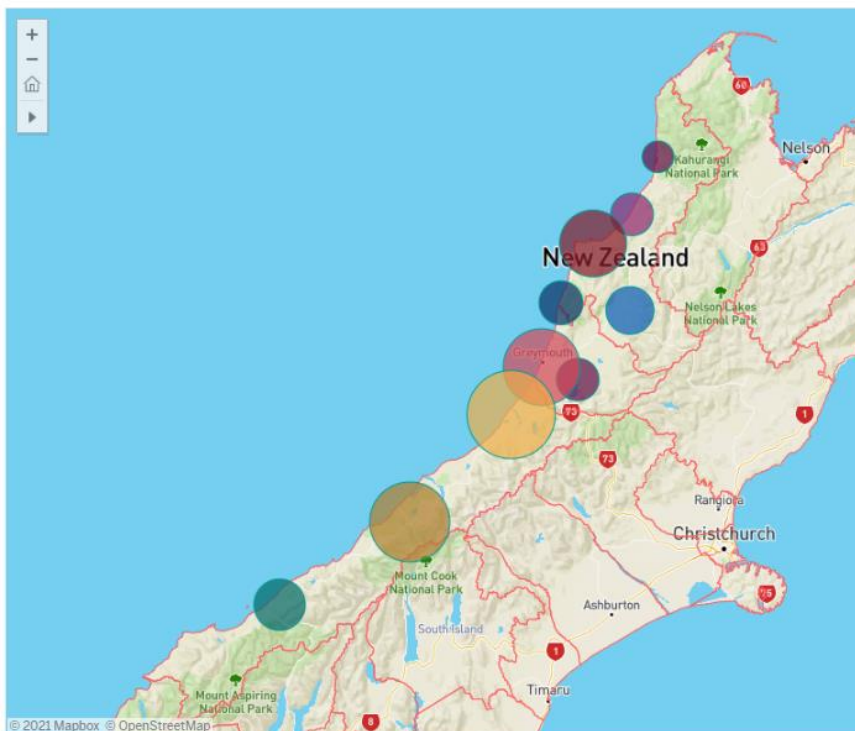
User Outflow for Westland District along Road Network



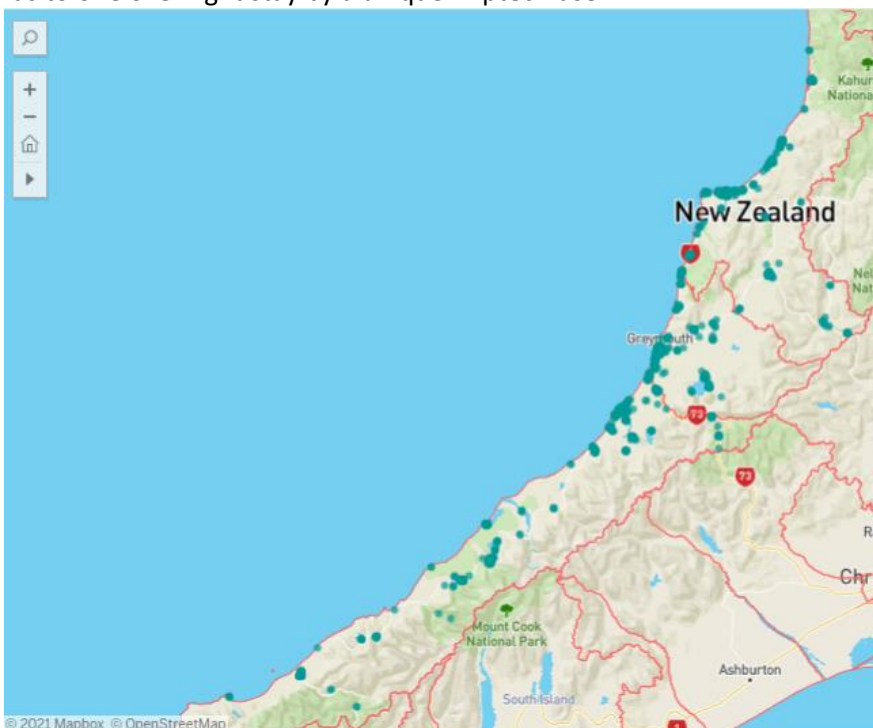
Overnight stays

Triptech overnight stay clusters show the most popular overnight stay locations for users in March 2021. Note that often these locations will correspond to areas with camping provisions. Overnight stay clusters were detected at the following locations: Hokitika (22%); Franz Josef (18%); Greymouth (16%); Westport (12%); Haast (7%); Reefton (6%); Punakaiki (5%); Moana/Lake Brunner (5%); between Hector and Seddonville (5%); and Karamea (3%).

Overnight Stay Clusters



The below chart shows overnight stay locations within the West Coast region in March 2021. One dot corresponds to one overnight stay by a unique Triptech user.



Active search times

The below chart shows the times of day that Triptech users visiting the West Coast in March 2021 were using apps to search for information. Users were most commonly searching for information between 12-5pm, with a peak at 2-3pm. Searches for accommodation made up the largest share of searches (peaking 2-4pm); followed by searches for services (peaking 12-1pm); searches for attractions (peaking 1-3pm) and searches for food (peaking 10-1pm).

Active Search Times

Hour of day that users were searching for information.

