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New Zealand Outlook - Projections

<table>
<thead>
<tr>
<th>Summary</th>
<th>2018</th>
<th>2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total spend ($m)$^1</td>
<td>11,162</td>
<td>14,937</td>
</tr>
<tr>
<td>Total visitors (000s)$^2</td>
<td>3,863</td>
<td>5,077</td>
</tr>
<tr>
<td>Total days (000s)$^2</td>
<td>70,710</td>
<td>94,834</td>
</tr>
<tr>
<td>Spend per day ($)$^3</td>
<td>195</td>
<td>203</td>
</tr>
<tr>
<td>Avg length of stay (days)$^2</td>
<td>18</td>
<td>19</td>
</tr>
</tbody>
</table>

$^1$ International Visitor Survey, MBIE
$^2$ International Travel and Migration data, Statistics NZ
$^3$ Derived from International Visitor Survey

Source: MBIE (Interactive webtool)
New Zealand Outlook - Projections

Source: MBIE (Interactive webtool)
NZ Visitor Arrivals - Projections

Source: MBIE (Interactive webtool)
NZ Average length of stay - Projections

Source: MBIE (Interactive webtool)
NZ Spend per day - Projections

Source: MBIE (Interactive webtool)
NZ Visitor Spending - Projections

Source: MBIE (Interactive webtool)
Visitor Strategy

- Visitation drives a range of benefits that are difficult to measure including:
  - Energy, excitement, confidence and pride.
  - Opportunities to make deals, exchange knowledge and expand networks.
  - The likelihood that some visitors will choose to relocate their talents and capital to Christchurch
Christchurch Airport
Visitor Arrivals

Source: StatisticsNZ
Visitor Arrivals - Purpose

Visitor Arrivals by purpose - Christchurch Airport (YE Jan)

Source: StatisticsNZ
Visitor Arrivals - Country

Christchurch Airport - Visitor Arrivals by country of residence

Australia
China, People's Republic of
Japan
Korea, Republic of
Germany
United Kingdom
Canada
United States of America

Source: StatisticsNZ
Visitor Arrivals - Country

Visitor Arrivals by country of residence (YE Jan)

Source: StatisticsNZ
Proportion of Visitors in Christchurch

Source: StatisticsNZ
Christchurch Airport - Review

• Total visitor arrivals have surpassed pre quake levels of 546,000 in 2010 reaching 550,000 in the 12 months to Jan 2020.
• Over the last 5 years the number of visitor arrivals have been growing on average 5.5% per year.
• Consistently the majority of visitors come to Christchurch for the purpose of a holiday/vacation.
• The greatest proportion of international visitors that pass through the Christchurch airport are from Australia (47%) followed by China (11%) and the United Kingdom (7%).
• Chinese visitors are the fastest growing visitor market, growing 548% since 2013.
Christchurch City
Christchurch – Guest Nights

Source: Massey University
Christchurch – Guest Nights Including Airbnb

Source: Massey University, AirDNA
Christchurch – Guest Nights Four Avenues

Hotel Guest Nights - Christchurch Four Avenues (YE September)

Source: Statistics NZ
Christchurch – Capacity vs Occupancy

Source: Statistics NZ

Christchurch - Occupancy vs Capacity
Source: Statistics New Zealand

- Capacity
- Occupancy

Source: Statistics NZ
Christchurch City - Review

• Following the earthquakes, Christchurch’s capacity fell by 40 percent. The continued rebuild has seen several major accommodation units re-open, however current capacity remains around 86% of pre-quake.

• International guest nights were the most affected following the 2010/11 earthquakes. Since then they have made a steady recovery of 10% on average per year since 2014.

• The rise of Airbnb's popularity in the city has seen guest nights in the city bounce back to pre earthquake levels.
ChristchurchNZ
Includes: Christchurch City, Hurunui, Waimakariri, Selwyn, Ashburton.
Christchurch

Total Spend Profile of Products in ChristchurchNZ RTO
YE Jan 2020

<table>
<thead>
<tr>
<th>Service</th>
<th>YE Jan 2020 Spend</th>
<th>YTY Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Retail sales - other</td>
<td>$1,780</td>
<td></td>
</tr>
<tr>
<td>Retail sales - fuel and other automotive products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Retail sales - alcohol, food, and beverages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other tourism products</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other passenger transport</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Food and beverage serving services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cultural, recreation, and gambling services</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Accommodation services</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Source: MBIE
ChristchurchNZ – Visitor Spending

Source: MBIE
ChristchurchNZ – Domestic Visitor Spending

Source: MBIE
ChristchurchNZ – International Visitor Spending

Source: MBIE
ChristchurchNZ – International Visitor Spending

Visitor spending by country - ChristchurchNZ (YE Jan)

Source: MBIE
ChristchurchNZ – Spending vs Arrivals

Visitor Arrivals vs Visitor Spending - 2020 vs 2019

Source: StatsNZ, MBIE, ChristchurchNZ
ChristchurchNZ – Spending vs Arrivals

Visitor Arrivals vs Visitor Spending - 2020 vs 2012

Source: StatsNZ, MBIE, ChristchurchNZ
When considering domestic visitor spend by product the greatest growth between 2015 and 2020 was seen in the following categories; other tourism products (58%), retail sales other (33%), food and beverage serving services (30%), other passenger transport (13.4%).

When considering international visitor spend by product the greatest growth between 2015 and 2020 was seen in the following categories; Cultural, recreational and gambling services (100%), Food and beverage services (85%), Retail sales – other (79%) and Retail sales - alcohol, food, and beverages (74%).

Chinese visitor spending grew the most between 2015 and 2019 seeing an increase of 171%.
Canterbury
Includes: Christchurch City, Hurunui, Waimakariri, Selwyn, Ashburton, Timaru, Mackenzie, Waimate, Waitaki, Kaikoura.
Canterbury

Total Spend Profile of Products in Canterbury Region
YE Jan 2020

- Accommodation services
- Cultural, recreation, and gambling services
- Food and beverage serving services
- Other passenger transport
- Other tourism products
- Retail sales - alcohol, food, and beverages
- Retail sales - fuel and other automotive products
- Retail sales - other

Canterbury Region Total Spending by Domestic/International
YE Jan 2020

- Domestic: $2,386.63, YTY Growth: -1.9%
- International: $1,686.18, YTY Growth: 6.9%

Source: MBIE
Canterbury – Visitor Spending

Source: MBIE

Visitor Spending - Canterbury (YE Jan)

- Domestic
- International
Canterbury – Domestic visitor Spending

Source: MBIE
Canterbury – International Visitor Spending

Source: MBIE

International visitor spending by product - Canterbury (YE Jan)

2016 2017 2018 2019 2020

Accommodation Service
Cultural, recreation and gambling services
Food and beverage servicing services
Other passenger transport
Other tourism products
Retail sales - alcohol, food and beverages
Retail sales - fuel and other automotive products
Retail sales - other

Source: MBIE
Canterbury – International Visitor Spending

International visitor spending by country - Canterbury (YE Jan)

Source: MBIE
Canterbury – Guest Nights

Source: Statistics NZ
Canterbury – Guest Nights

Source: Statistics NZ
Canterbury – Capacity vs Occupancy

Source: Statistics NZ
Canterbury - Review

• In Canterbury the greatest proportion of spend for the year ending January 2020 within the domestic visitor marker was on other retail sales – other (30%), followed by other passenger transport (18%).

• International visitor spending has increased by 52% since 2011, increasing to $1.7b for the year ended January 2020.

• Like in the ChristchurchNZ RTO, international guest nights were the most affected following the 2010/11 earthquakes. Over the last 5 years the number of guest nights have been growing on average 4% per year.
Cruise Ship Survey

Source: Statistics NZ
Cruise Ship Survey

Source: Statistics NZ
Visitor Attractions

• Botanic Gardens
• Christchurch Museum
• Christchurch Art Gallery
• Akaroa
• Hanmer springs
• Mackenzie region
• Kaikoura