

# **ChristchurchNZ Tourism Fact Book**

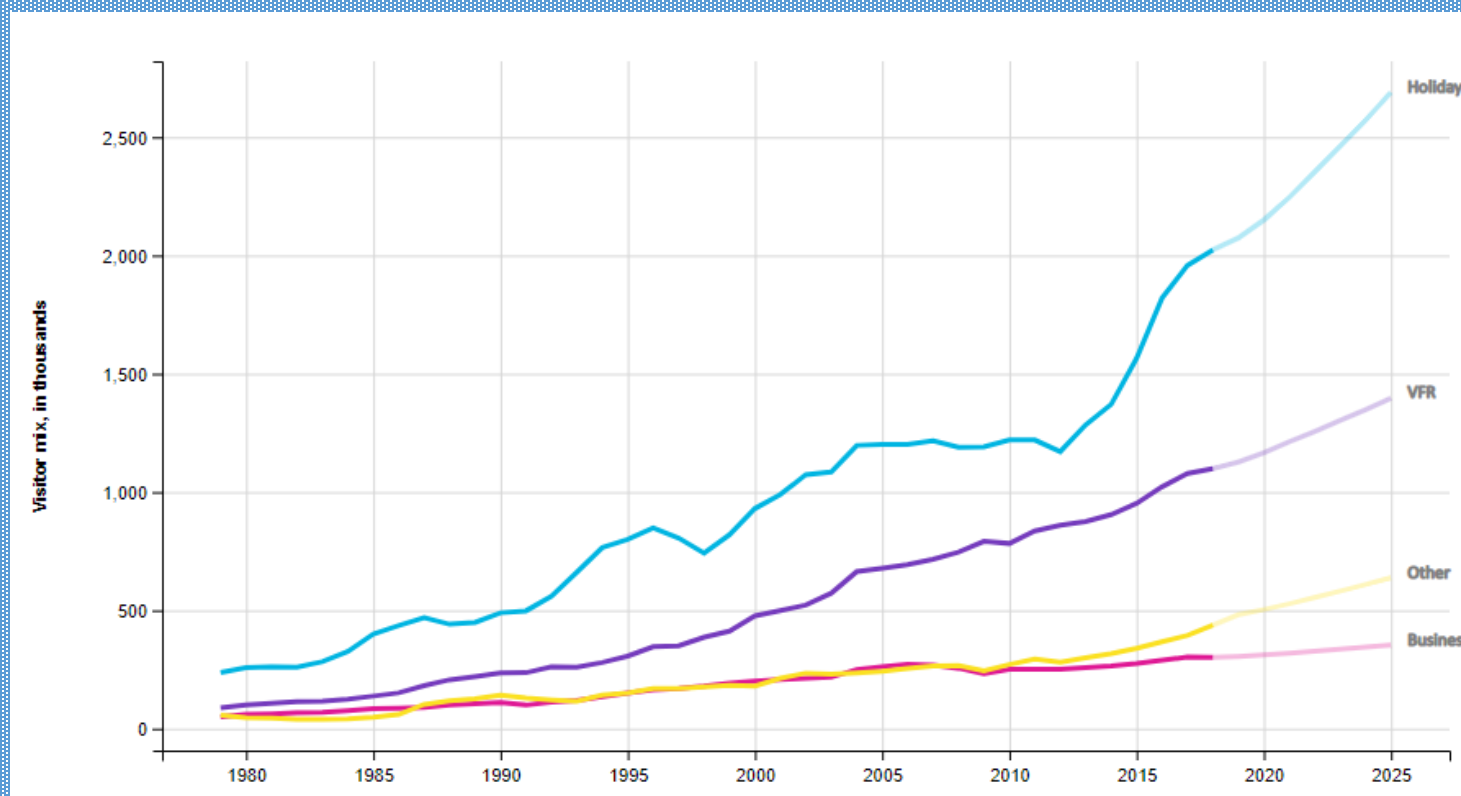
# Table of contents

- National projections
- Overarching strategy and objectives
- Christchurch International Airport
  - Visitor arrivals
  - Visitor projection
- Christchurch City
  - Commercial accommodation
  - Projections
- ChristchurchNZ (RTO)
  - Visitor spending
  - Projections
  - Spending vs arrival growth
- Canterbury
  - Visitor Spending
  - Commercial accommodation
  - Projections
  - Cruise ship survey
  - Visitor attractions

# New Zealand Outlook - Projections

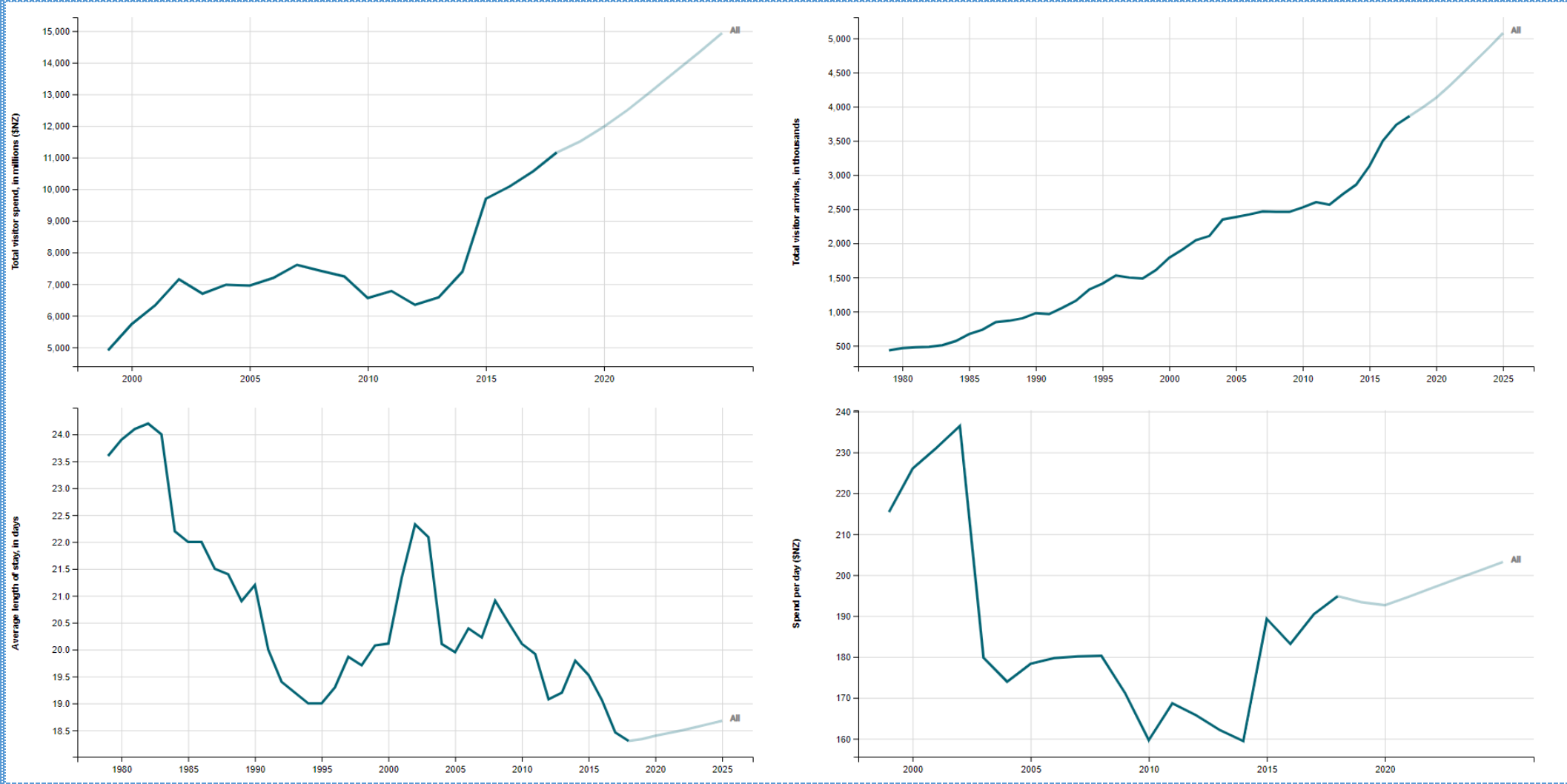
Summary	2018	2025	
Total spend (\$m) <sup>1</sup>	11,162	14,937	↑
Total visitors (000s) <sup>2</sup>	3,863	5,077	↑
Total days (000s) <sup>2</sup>	70,710	94,834	↑
Spend per day (\$) <sup>3</sup>	195	203	↑
Avg length of stay (days) <sup>2</sup>	18	19	↑

<sup>1</sup> International Visitor Survey, MBIE  
<sup>2</sup> International Travel and Migration data, Statistics NZ  
<sup>3</sup> Derived from International Visitor Survey



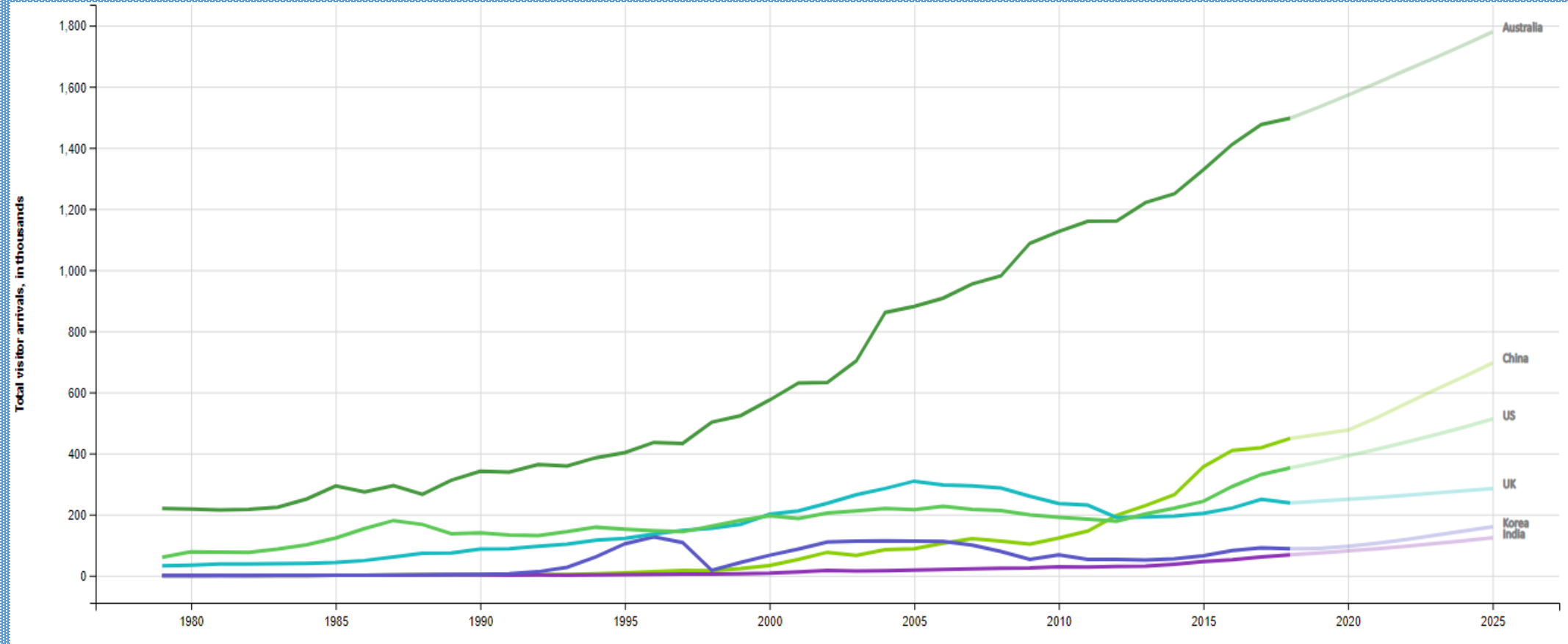
Source: MBIE (Interactive webtool)

# New Zealand Outlook - Projections



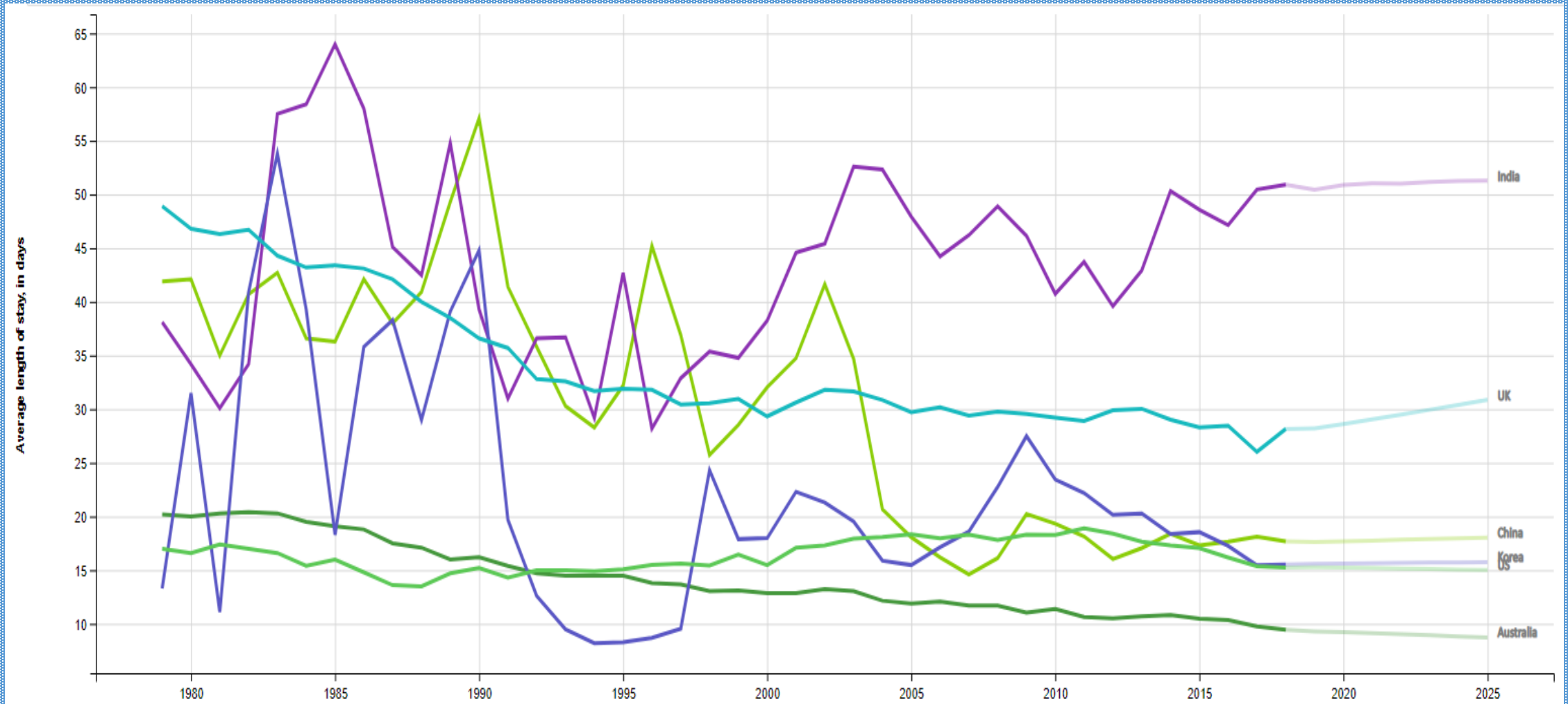
Source: MBIE (Interactive webtool)

# NZ Visitor Arrivals - Projections



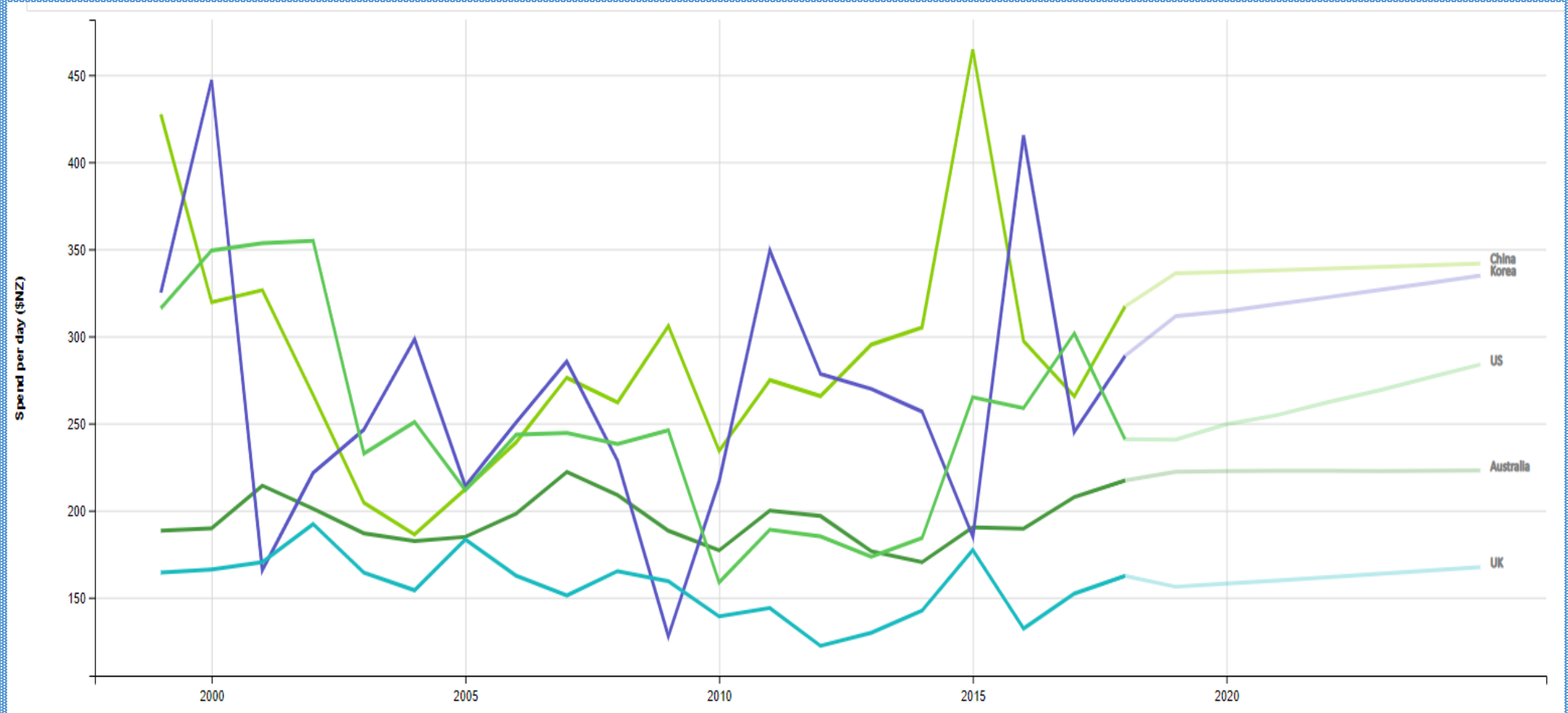
Source: MBIE (Interactive webtool)

# NZ Average length of stay - Projections



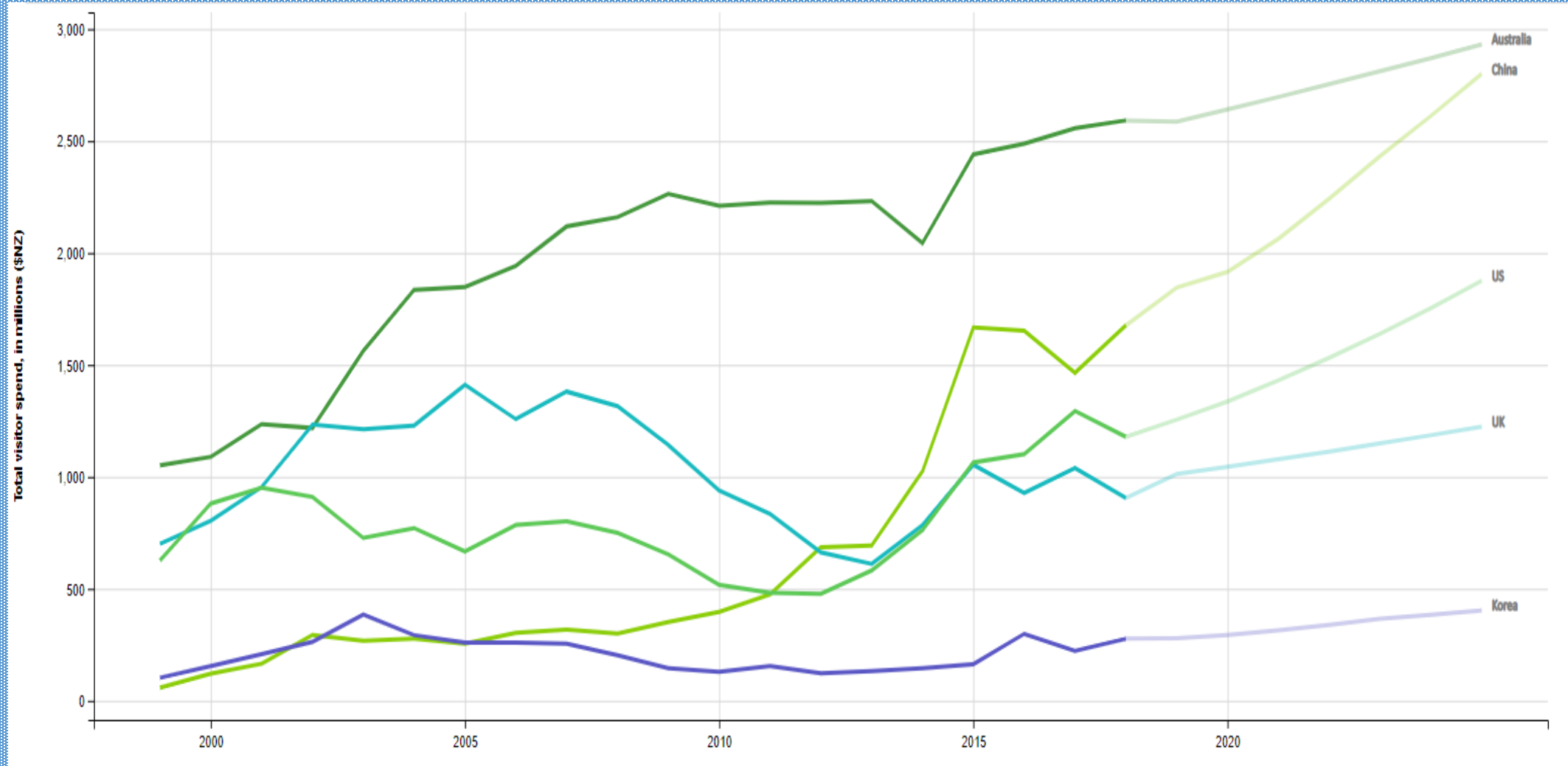
Source: MBIE (Interactive webtool)

# 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

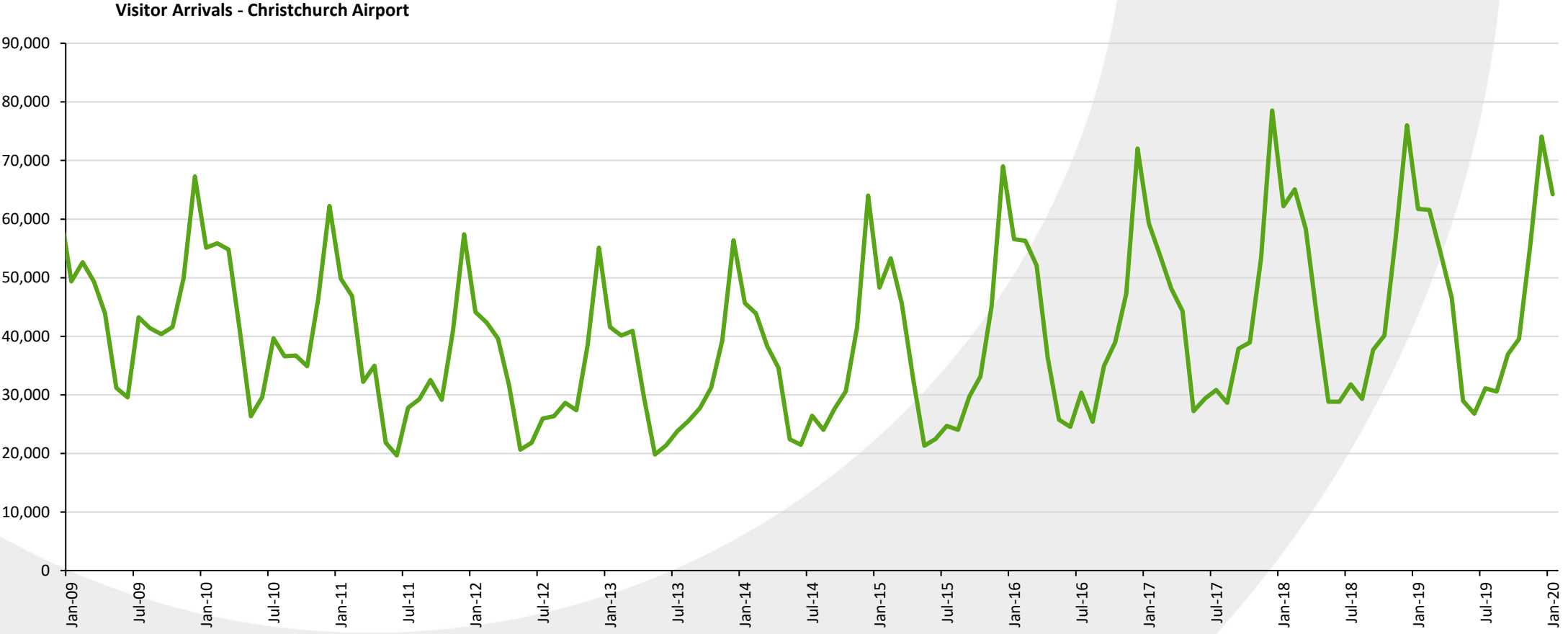


Source: Fresh Info Co, Destination 2025 Discussion Paper, May 2015

# Christchurch Airport

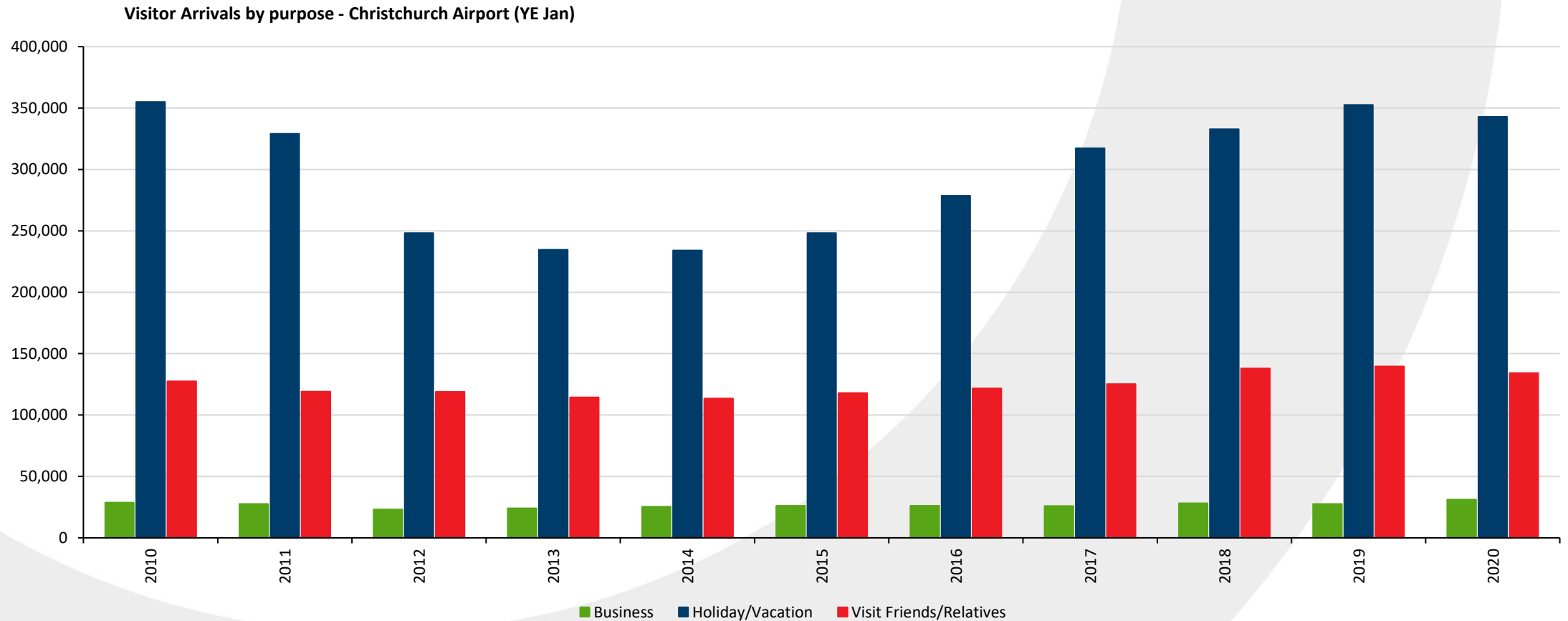
ChristchurchNZ™

# Visitor Arrivals



Source: StatisticsNZ

# Visitor Arrivals - Purpose



Source: StatisticsNZ

ChristchurchNZ™

# Visitor Arrivals - Country

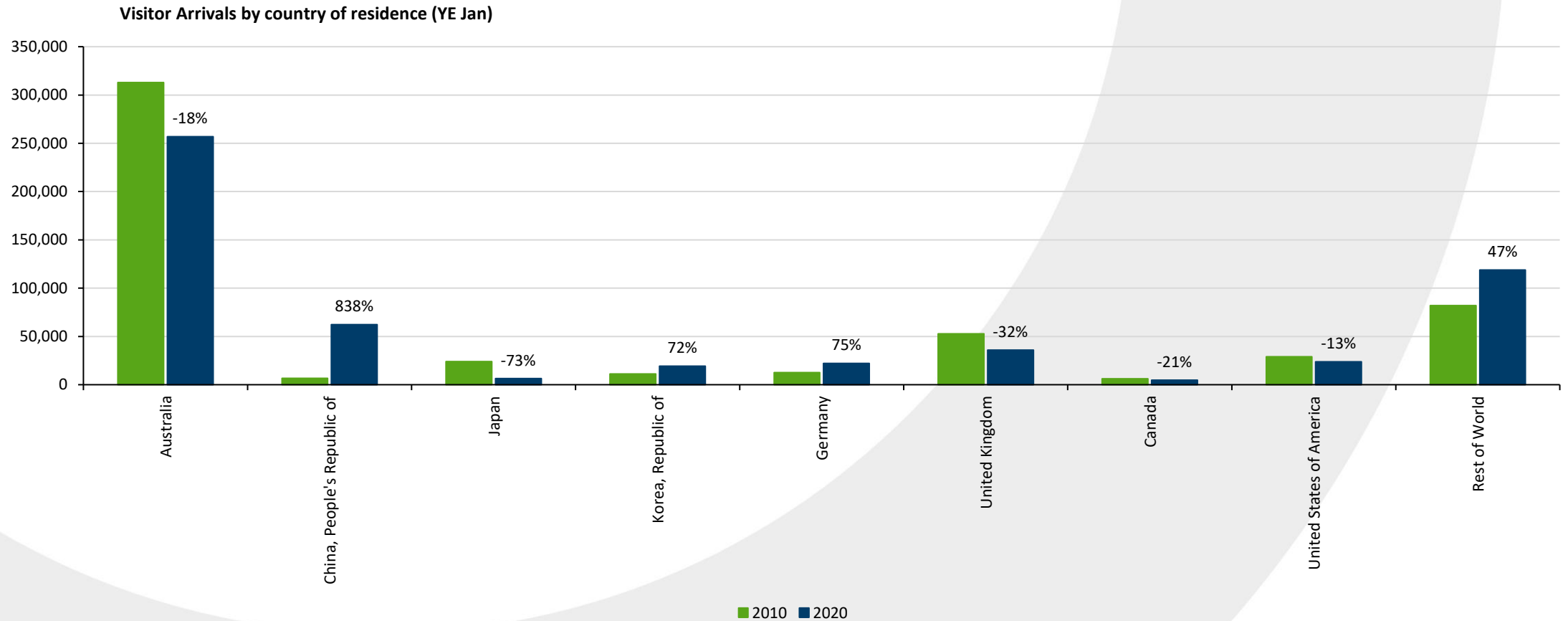
Christchurch Airport - Visitor Arrivals by country of residence



Source: StatisticsNZ

ChristchurchNZ™

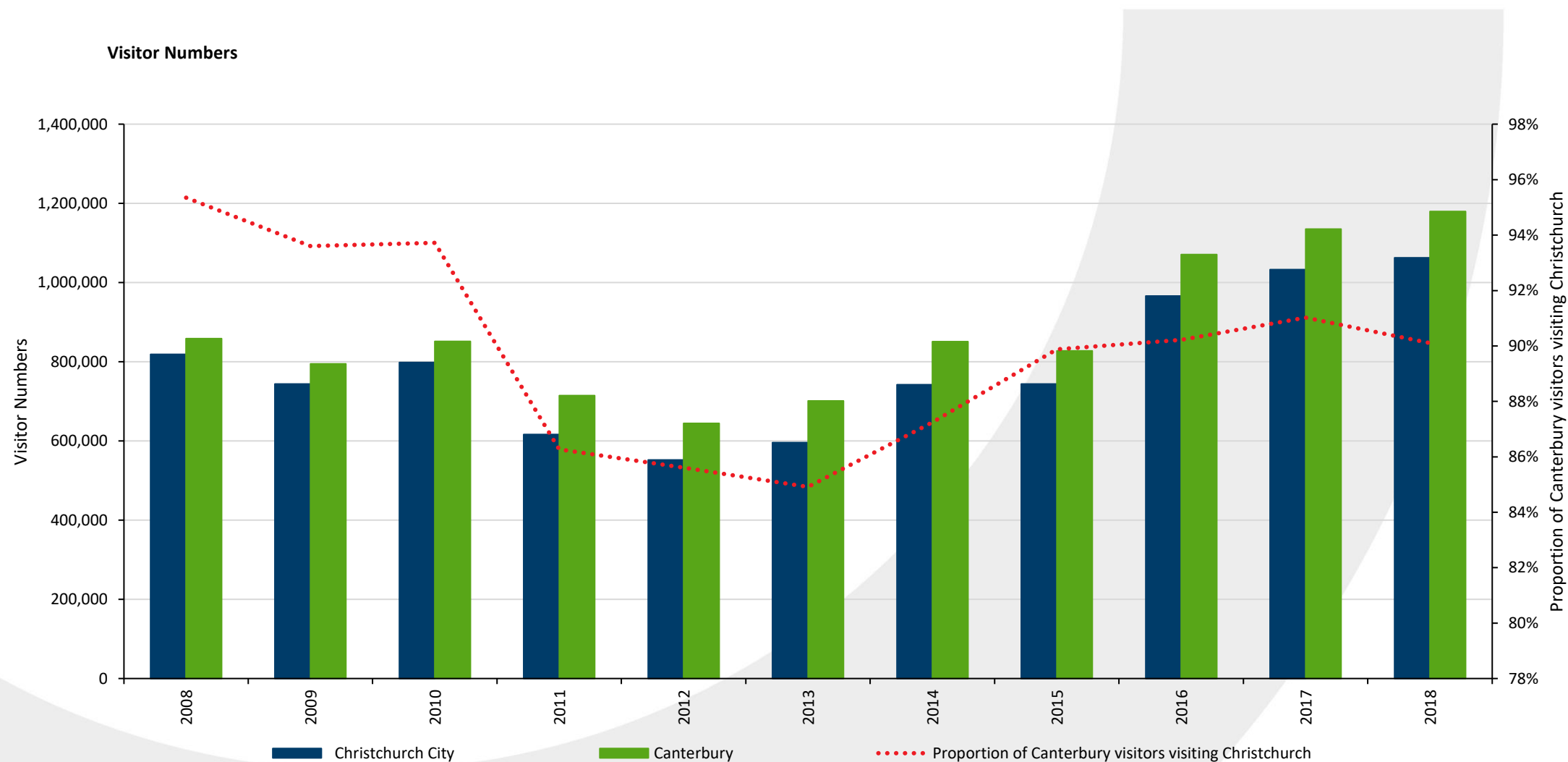
# Visitor Arrivals - Country



Source: StatisticsNZ

ChristchurchNZ™

# Proportion of Visitors in Christchurch



Source: StatisticsNZ

ChristchurchNZ™

# Christchurch Airport - Review

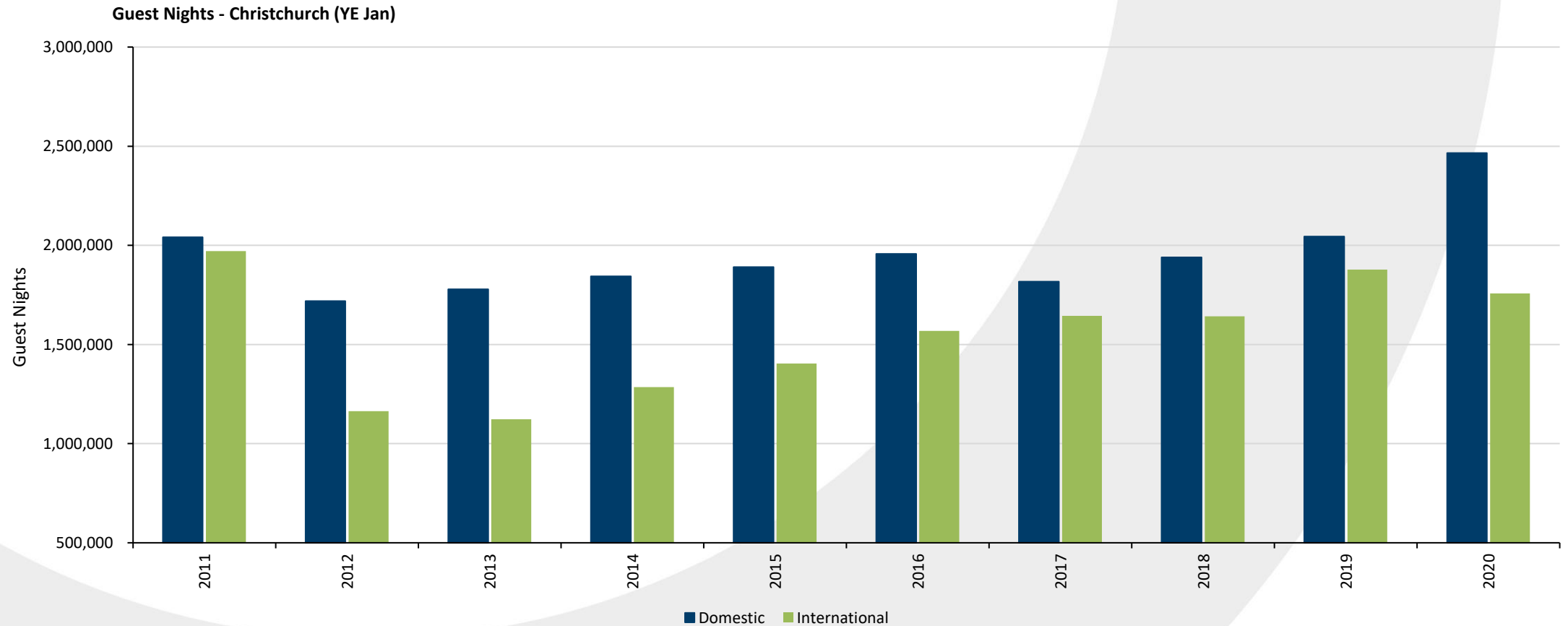
- Total visitor arrivals have surpassed pre quake levels of 546,000 in 2010 reaching 550,000 in the 12 months to Jan 2020.
- Over the last 5 years the number of visitor arrivals have been growing on average 5.5% per year.
- Consistently the majority of visitors come to Christchurch for the purpose of 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

ChristchurchNZ™

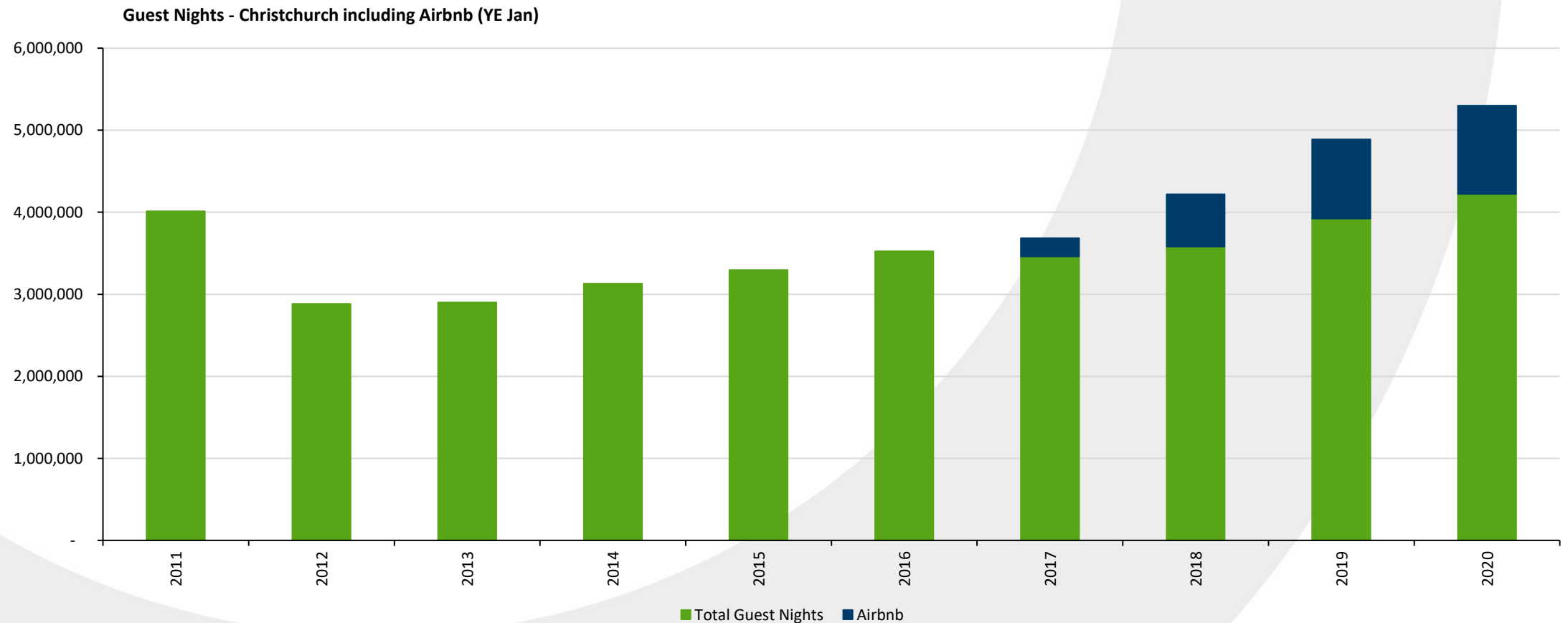
# Christchurch – Guest Nights



Source: Massey University

ChristchurchNZ™

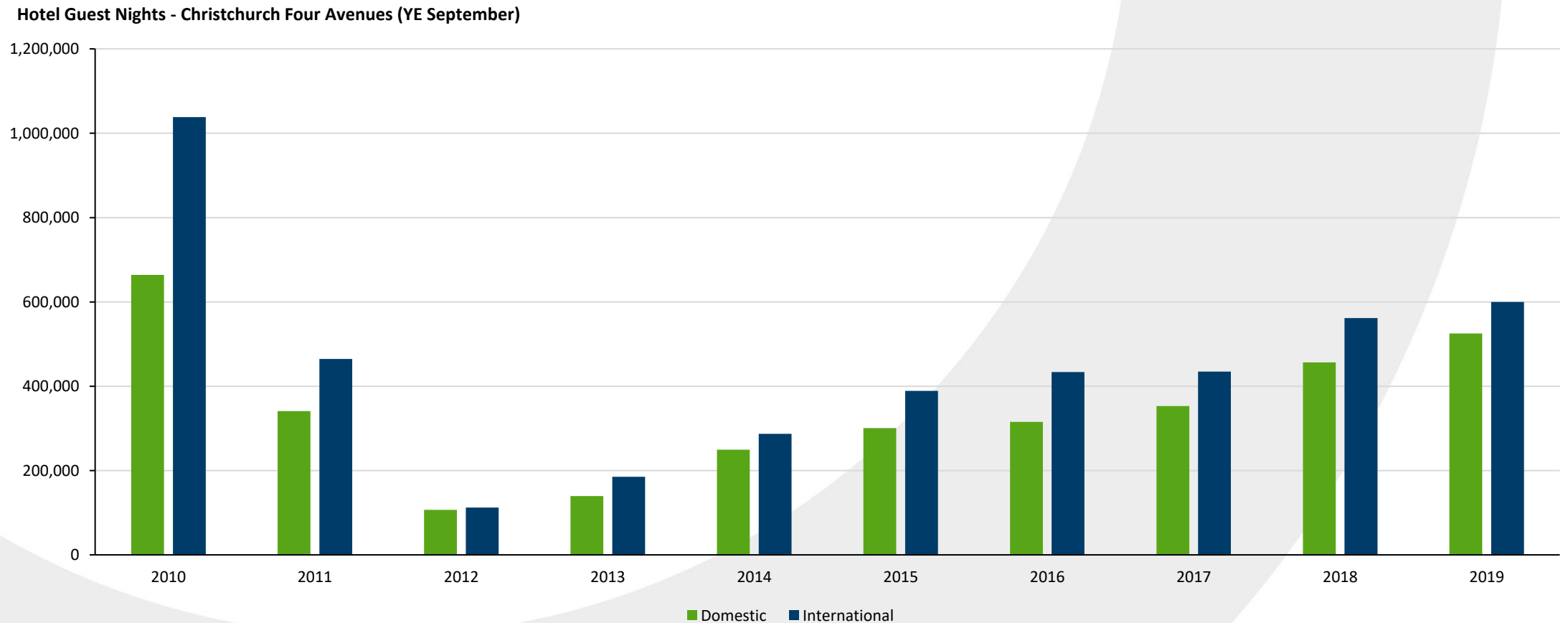
# Christchurch – Guest Nights Including Airbnb



Source: Massey University, AirDNA

ChristchurchNZ™

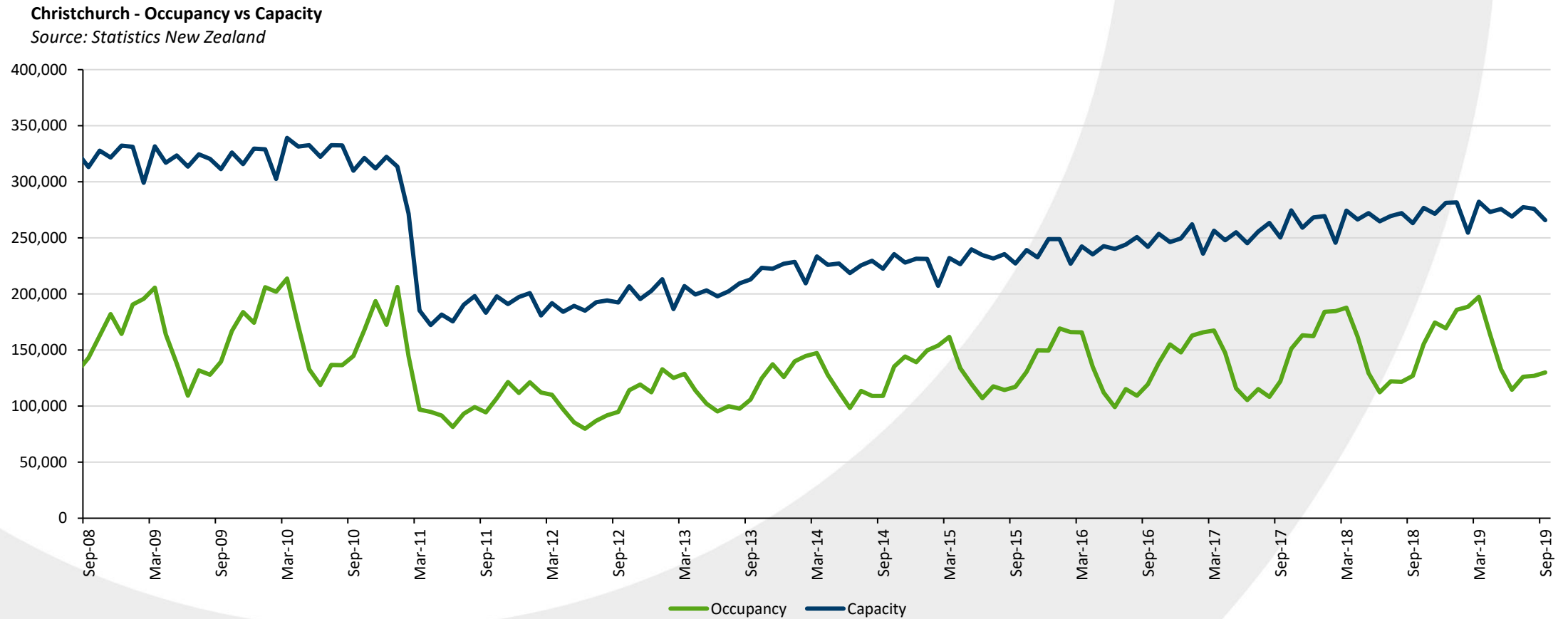
# Christchurch – Guest Nights Four Avenues



Source: Statistics NZ

ChristchurchNZ™

# Christchurch – Capacity vs Occupancy



Source: Statistics NZ

ChristchurchNZ™

# 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.

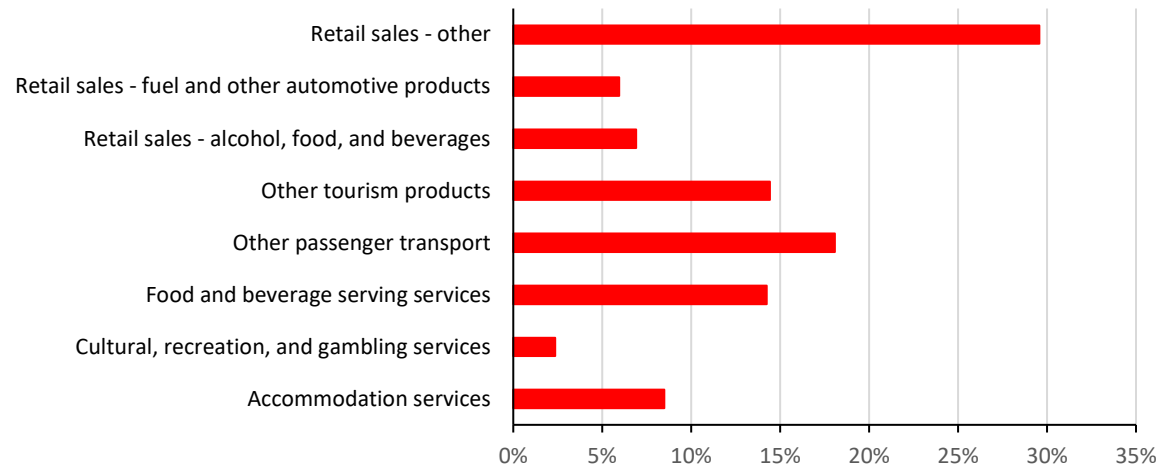
# ChristchurchNZ

Includes: Christchurch City, Hurunui, Waimakariri, Selwyn, Ashburton.

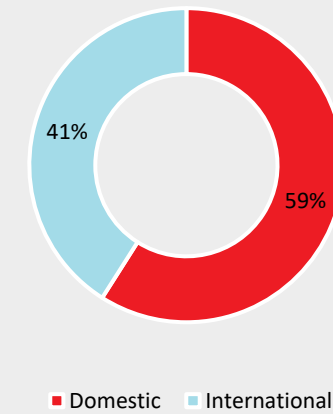
ChristchurchNZ™

# Christchurch

**Total Spend Profile of Products in ChristchurchNZ RTO  
YE Jan 2020**



**ChristchurchNZ RTO Total Spending by Domestic/International  
YE Jan 2020**



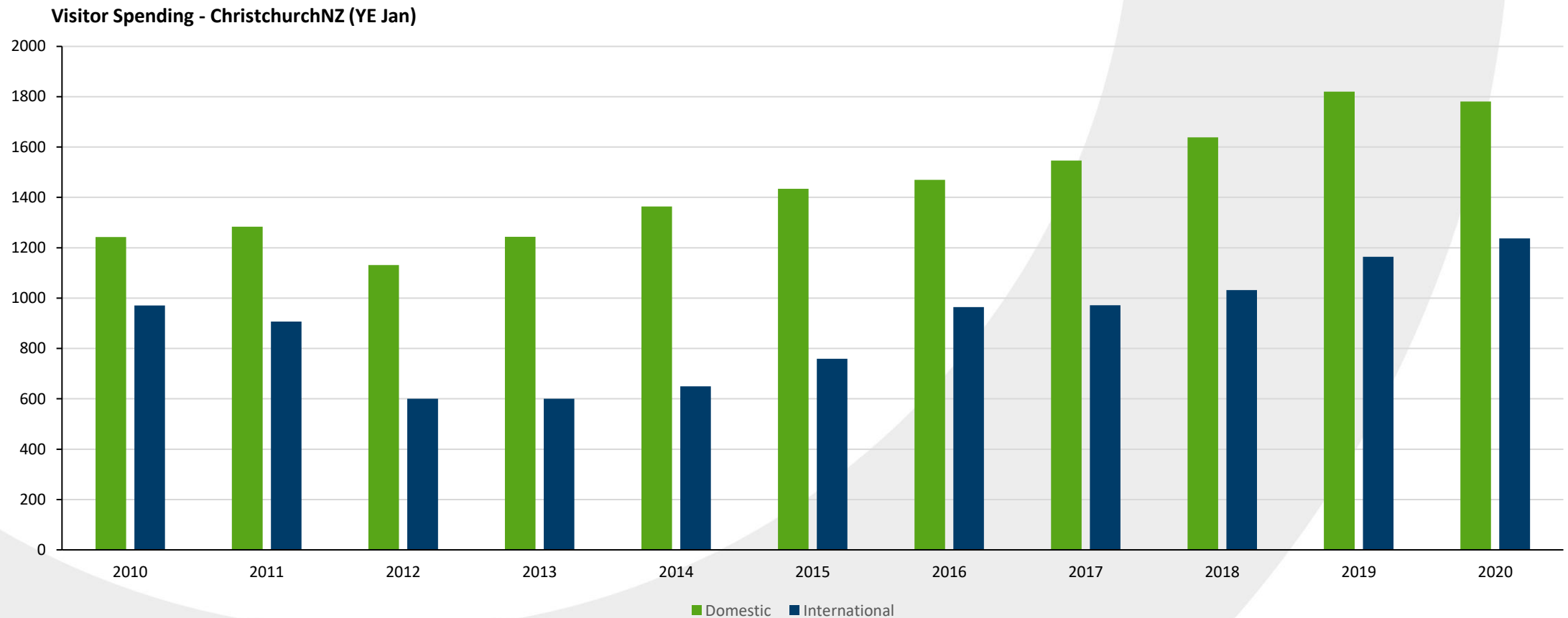
	YE Jan 2020 Spend	YTY Growth
Domestic	\$ 1,780	-2.2%
International	\$ 1,237	6.3%

Source: MBIE

**ChristchurchNZ™**



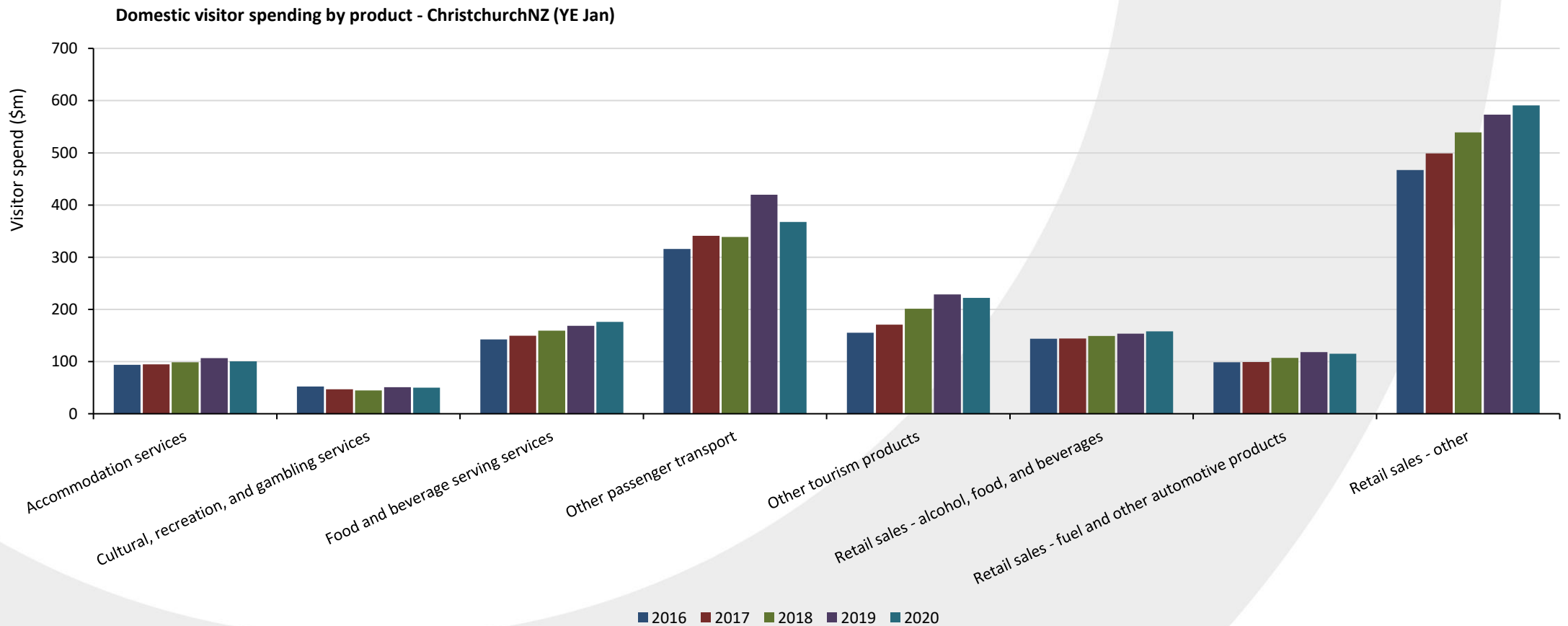
# ChristchurchNZ – Visitor Spending



Source: MBIE

ChristchurchNZ™

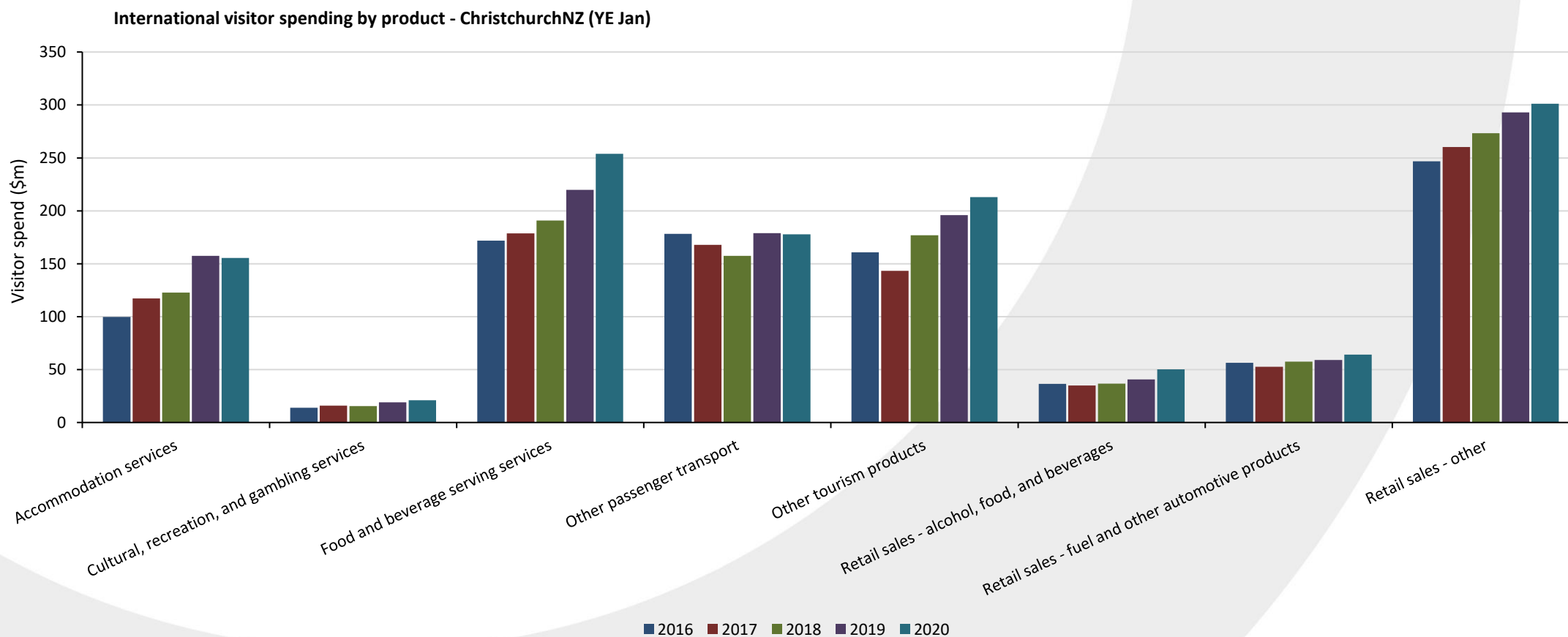
# ChristchurchNZ – Domestic Visitor Spending



Source: MBIE

ChristchurchNZ™

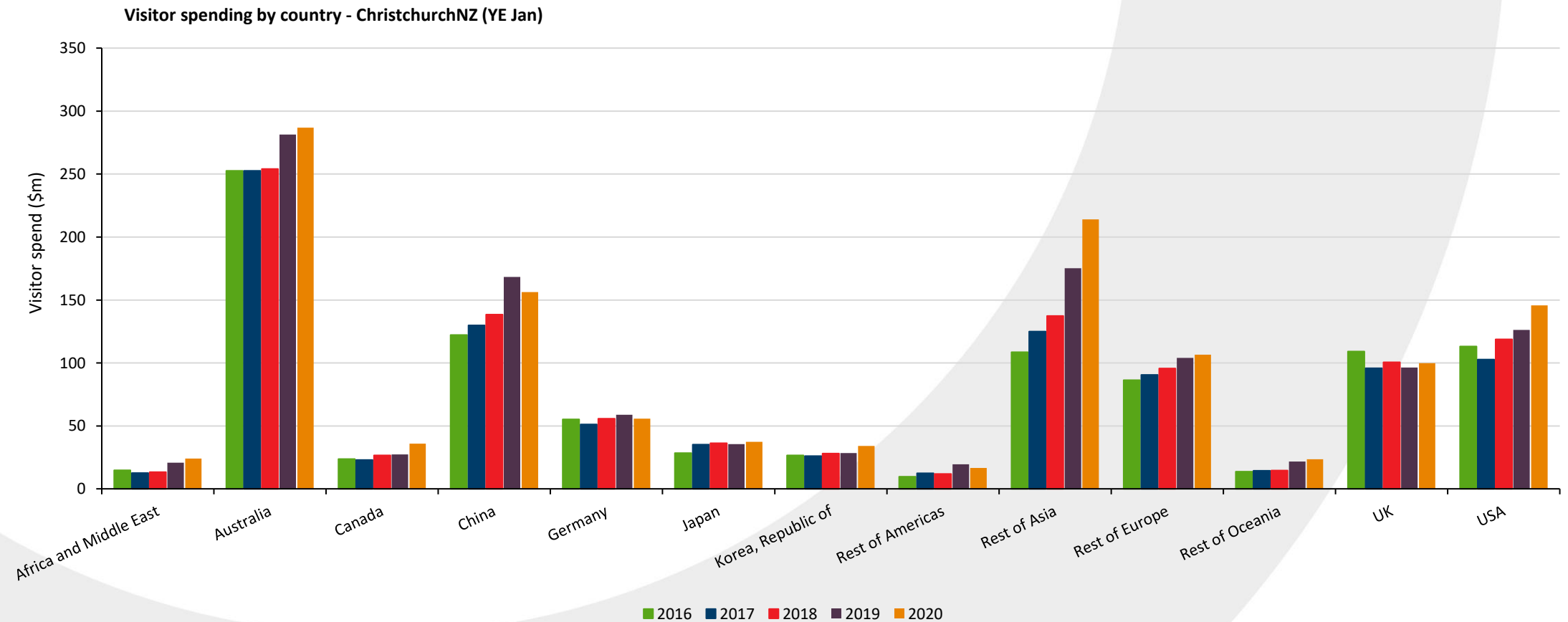
# ChristchurchNZ – International Visitor Spending



Source: MBIE

ChristchurchNZ™

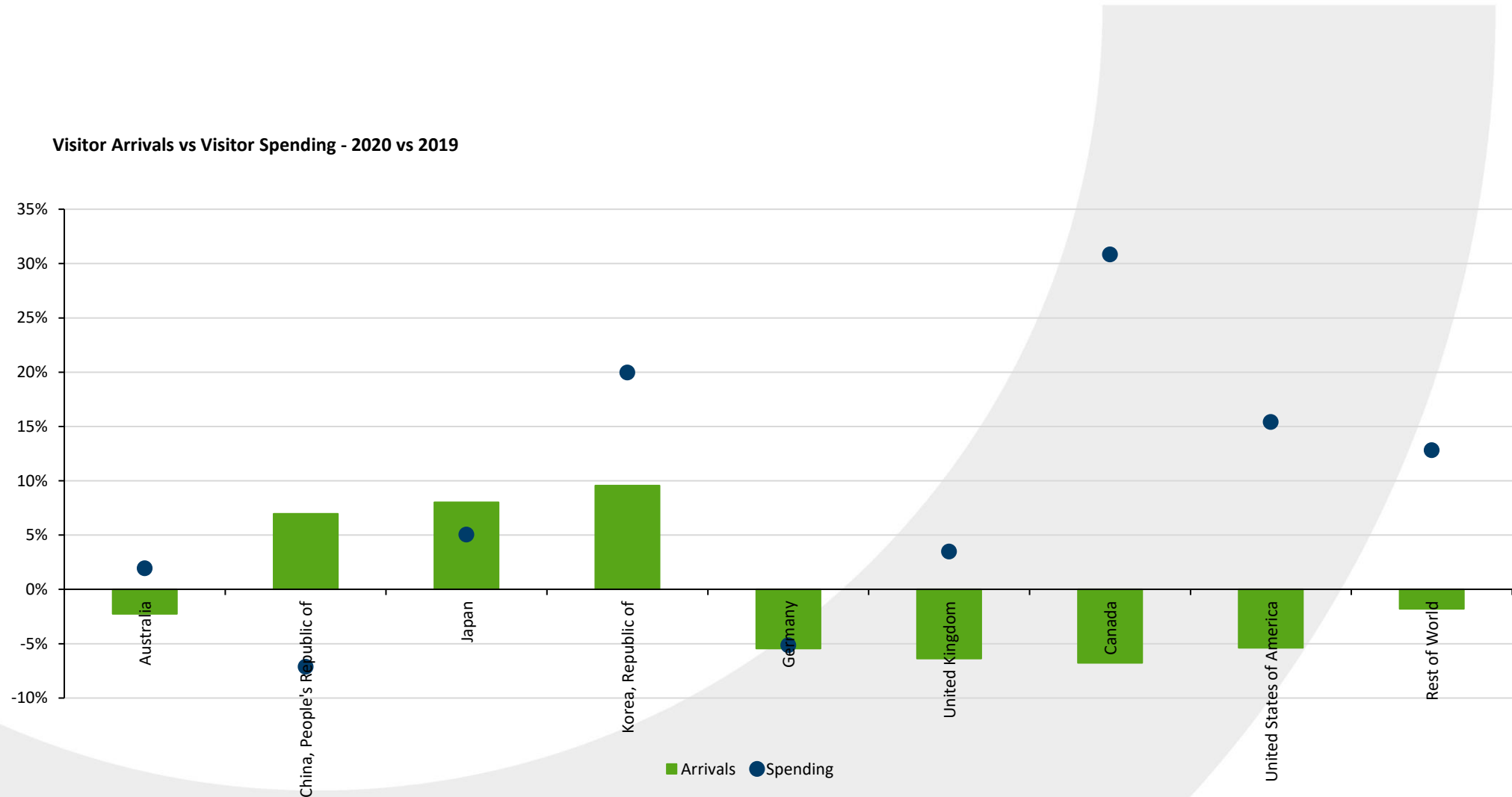
# ChristchurchNZ – International Visitor Spending



Source: MBIE

ChristchurchNZ™

# ChristchurchNZ – Spending vs Arrivals

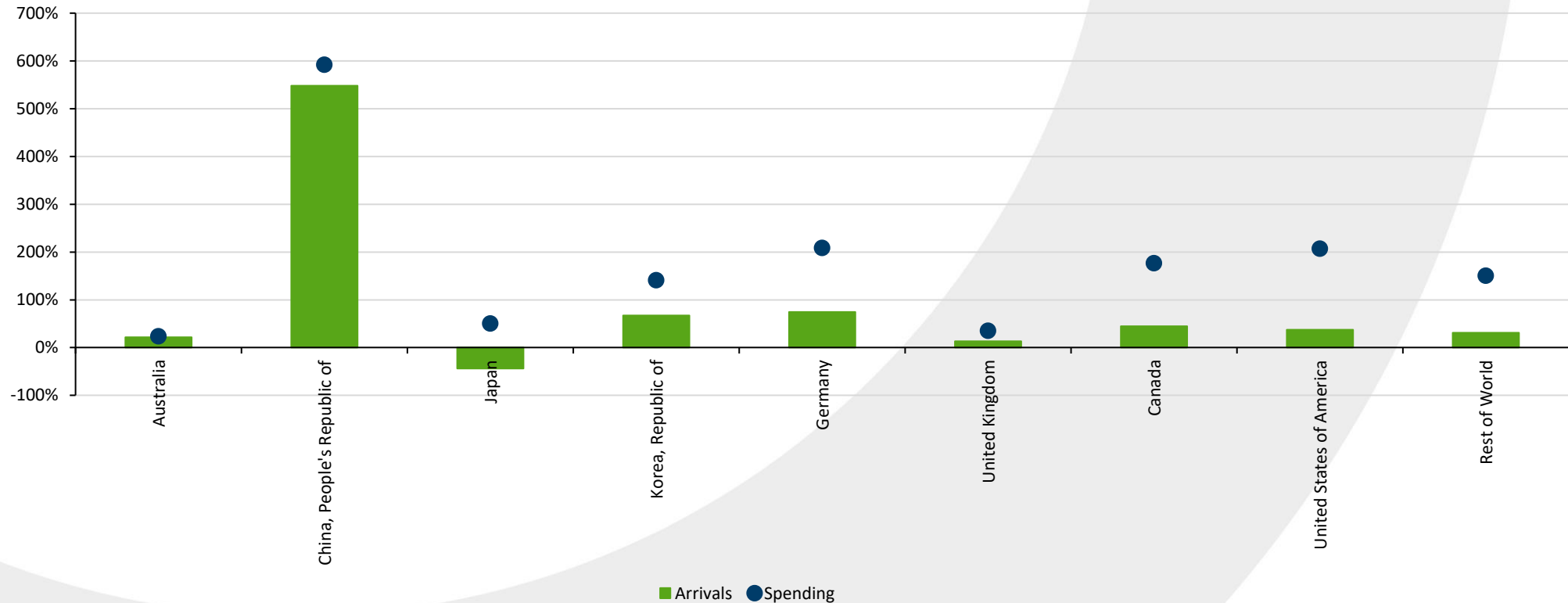


Source: StatsNZ, MBIE, ChristchurchNZ

ChristchurchNZ™

# ChristchurchNZ – Spending vs Arrivals

Visitor Arrivals vs Visitor Spending - 2020 vs 2012



Source: StatsNZ, MBIE, ChristchurchNZ

ChristchurchNZ™

# ChristchurchNZ RTO - Review

- 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%.

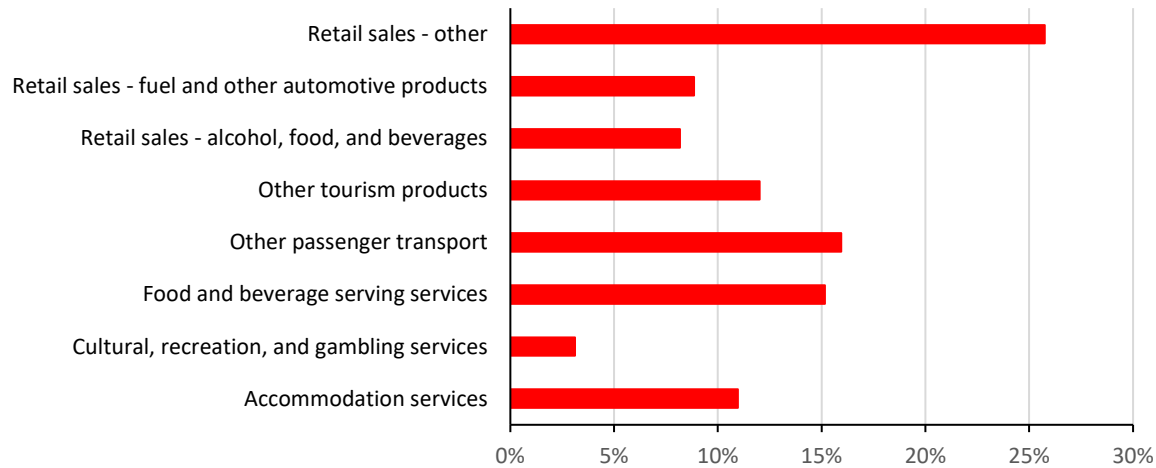
# Canterbury

Includes: Christchurch City, Hurunui, Waimakariri, Selwyn, Ashburton, Timaru, Mackenzie, Waimate, Waitaki, Kaikoura.

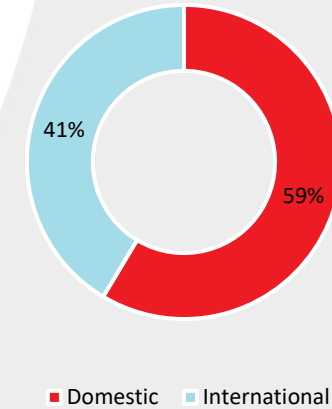


# Canterbury

**Total Spend Profile of Products in Canterbury Region  
YE Jan 2020**



**Canterbury Region Total Spending by Domestic/International  
YE Jan 2020**

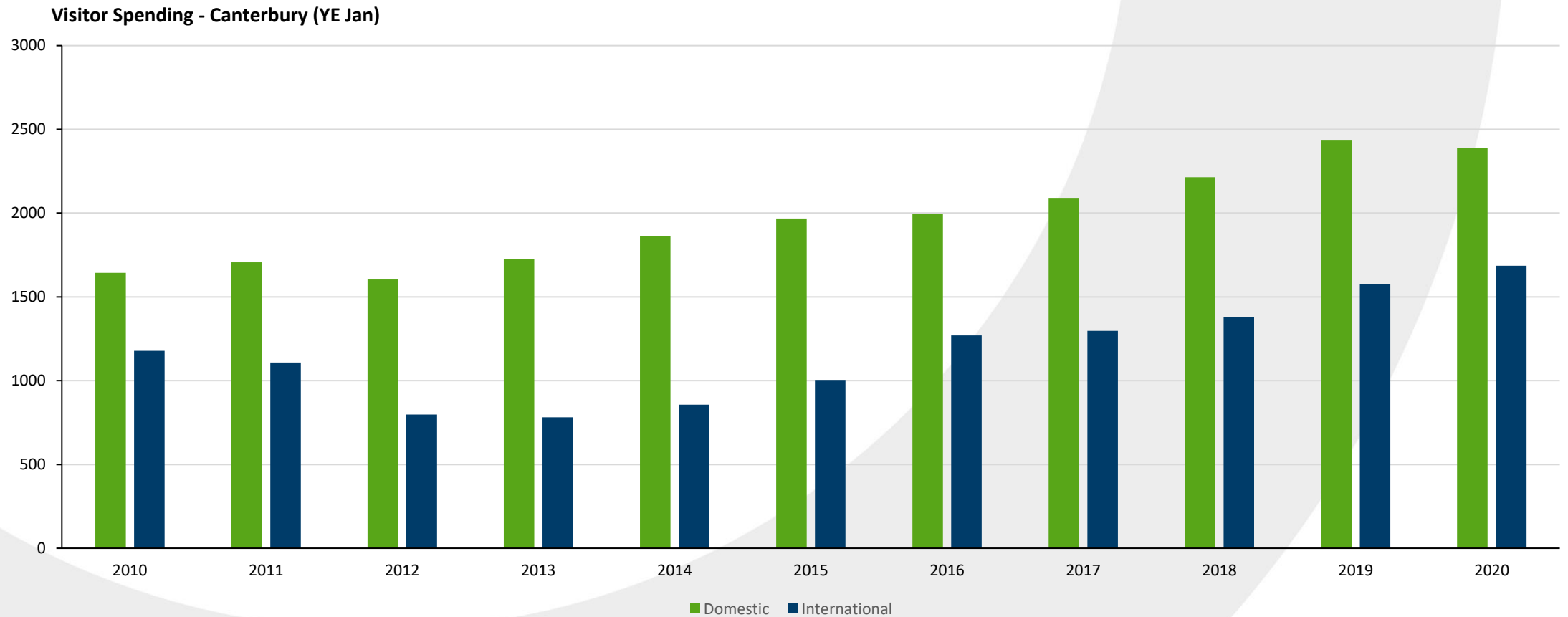


	YE Jan 2020	YTY Growth
Domestic	\$ 2,386.63	-1.9%
International	\$ 1,686.18	6.9%

Source: MBIE

**ChristchurchNZ™**

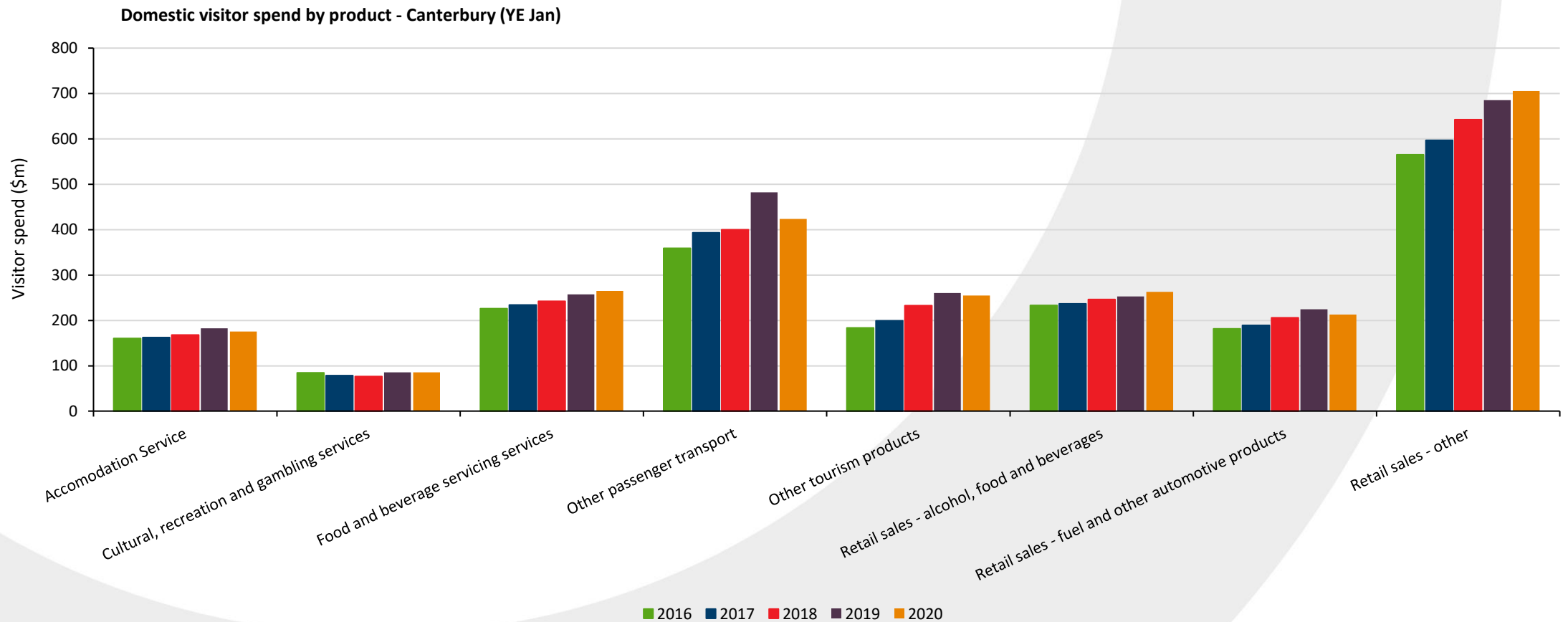
# Canterbury – Visitor Spending



Source: MBIE

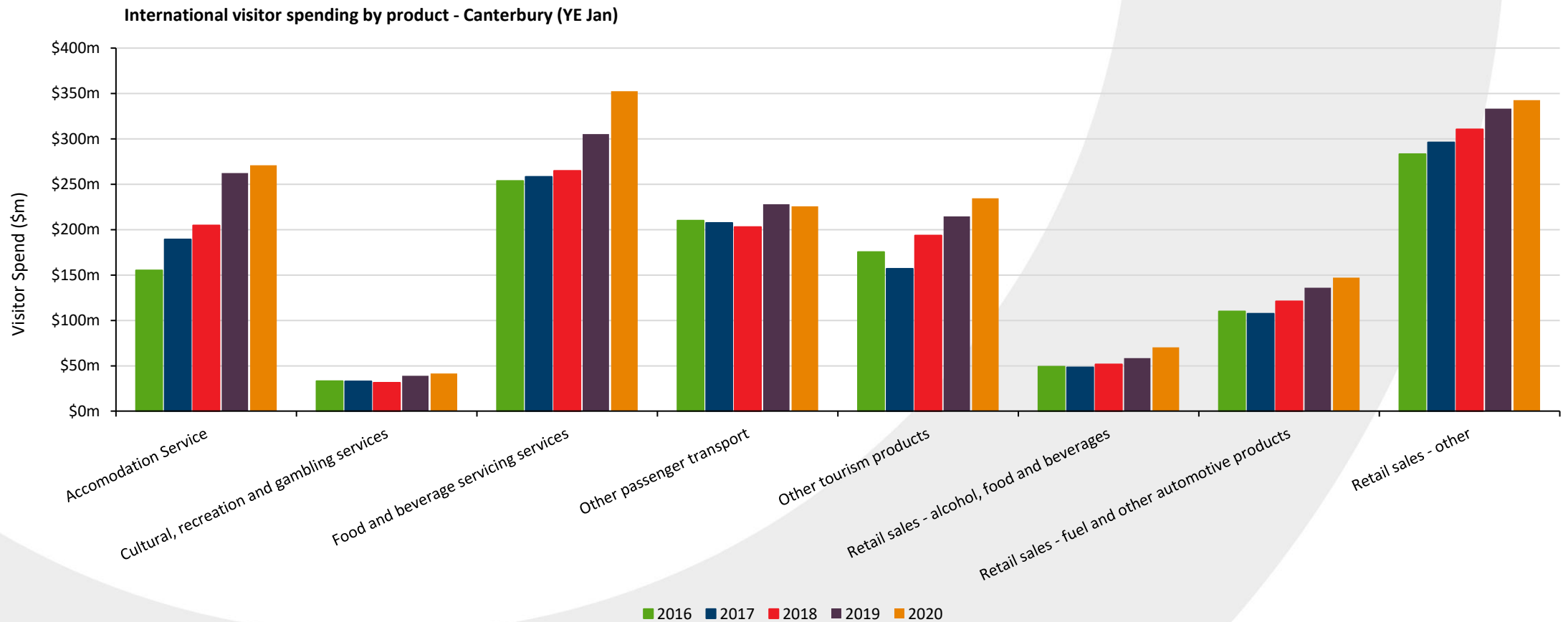
ChristchurchNZ™

# Canterbury – Domestic visitor Spending



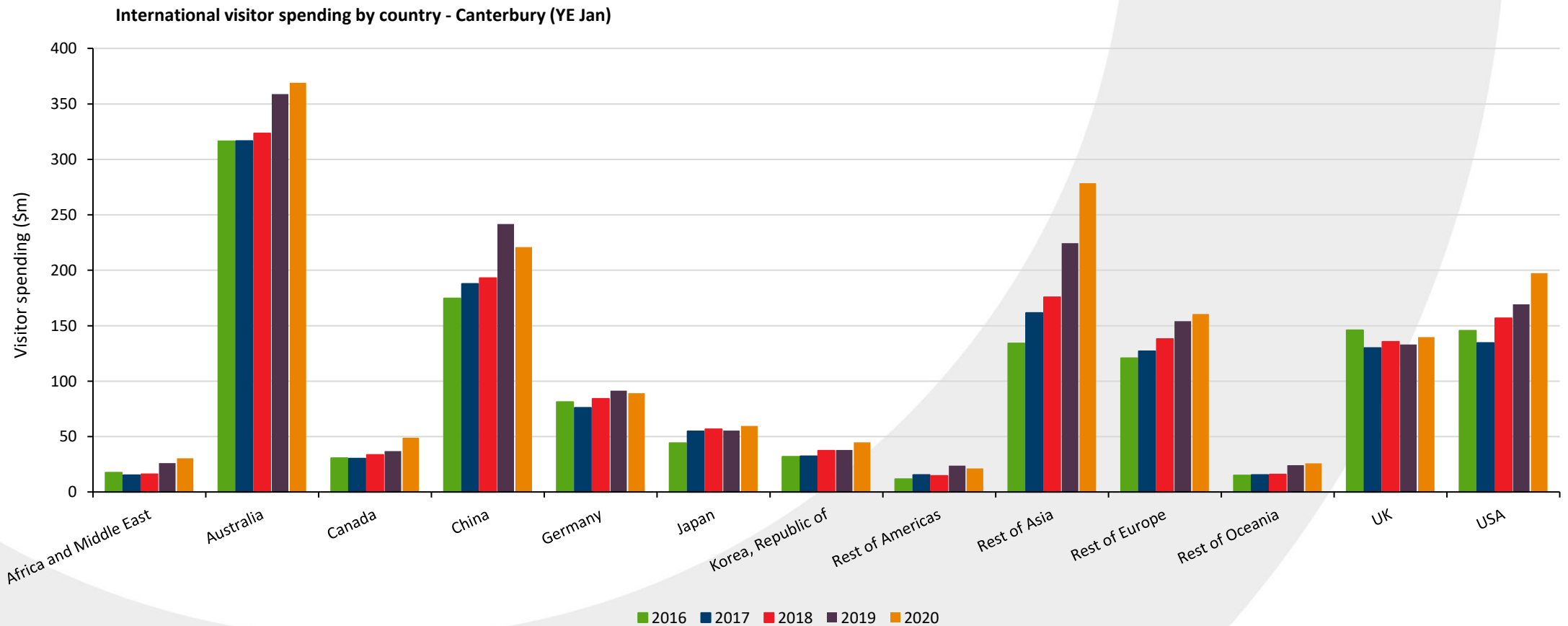
Source: MBIE

# Canterbury – International Visitor Spending



Source: MBIE

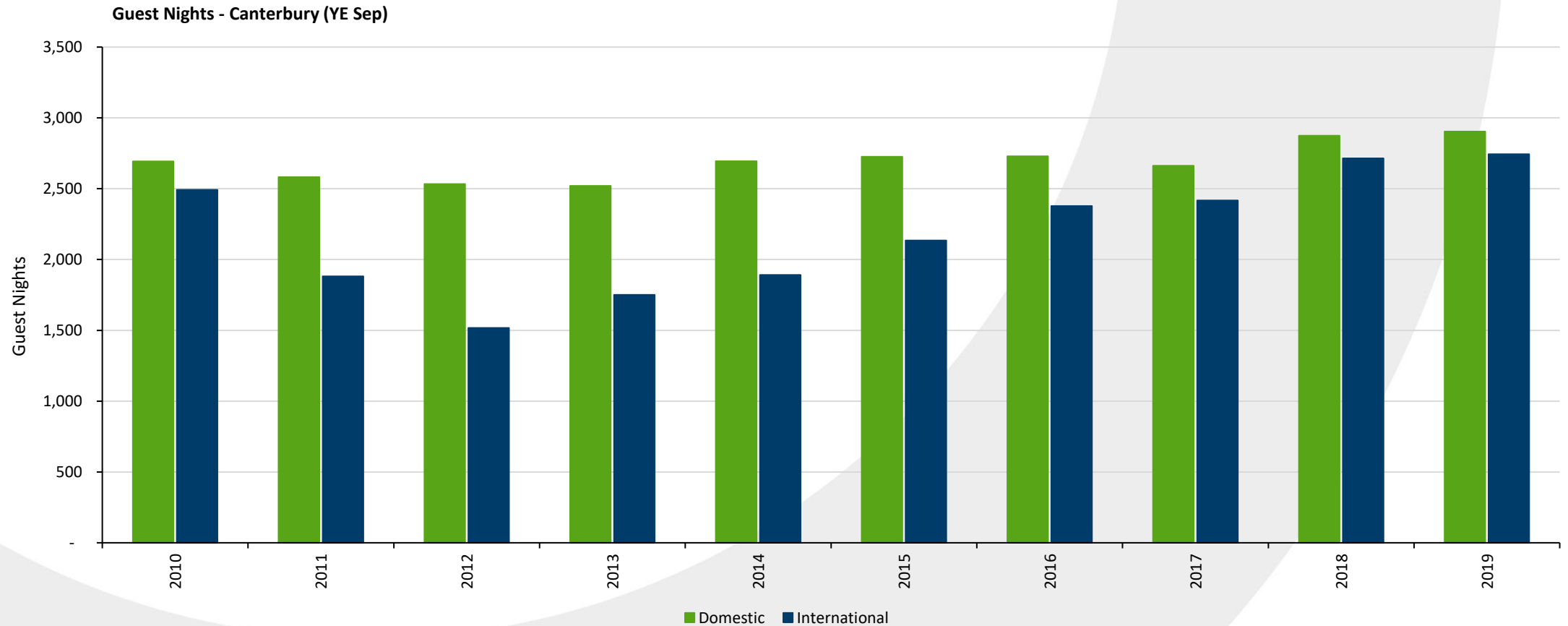
# Canterbury – International Visitor Spending



Source: MBIE

ChristchurchNZ™

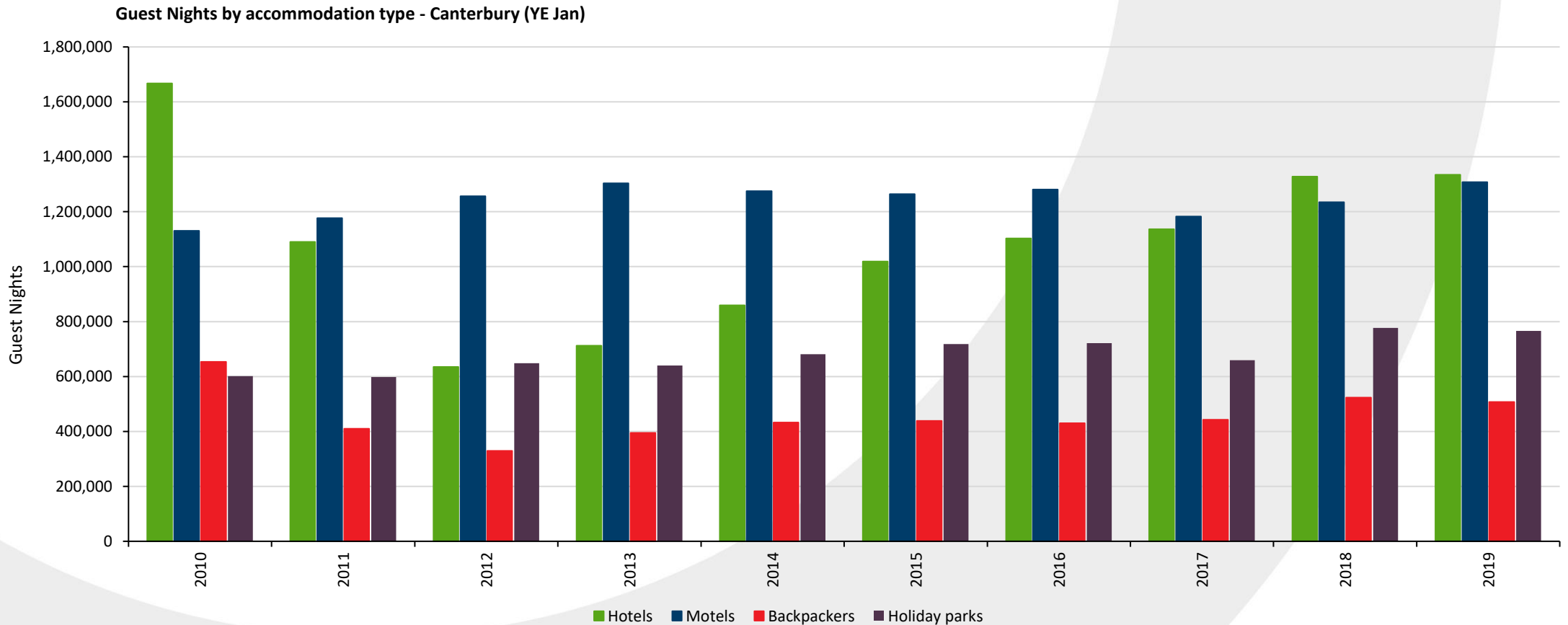
# Canterbury – Guest Nights



Source: Statistics NZ

ChristchurchNZ™

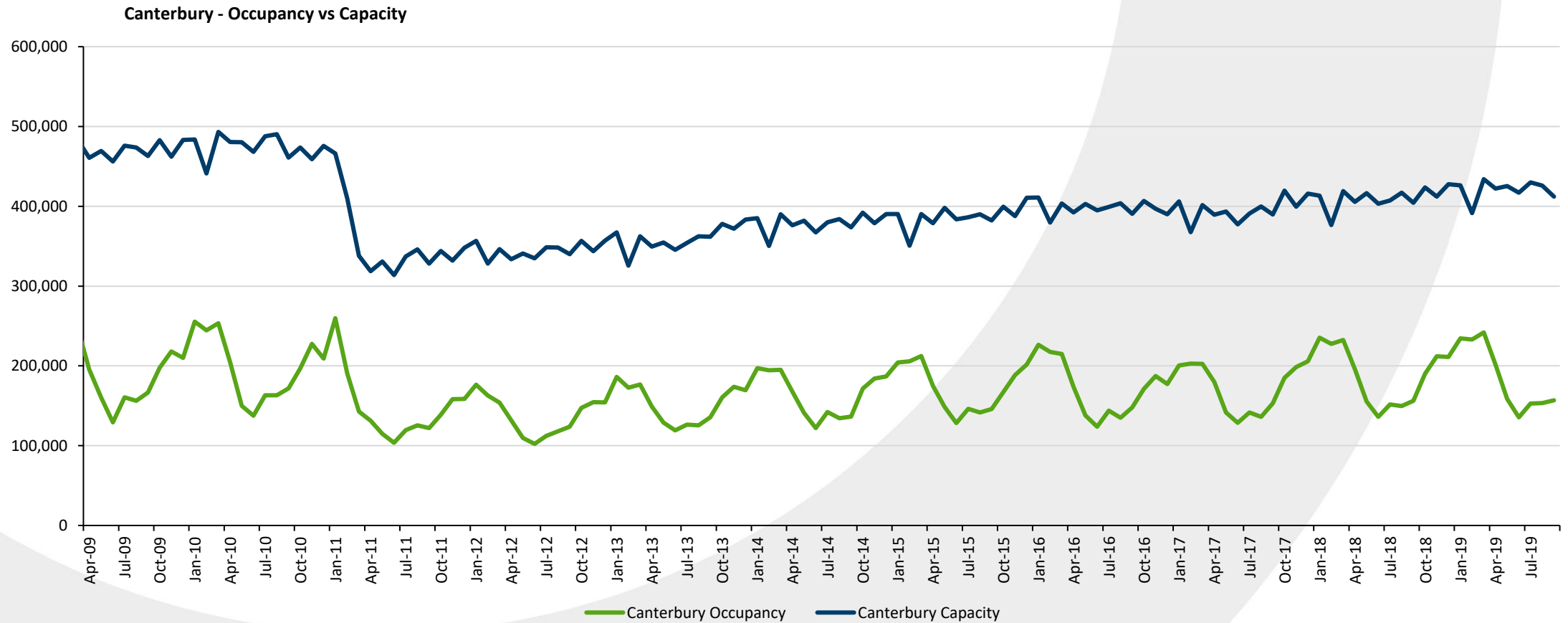
# Canterbury – Guest Nights



Source: Statistics NZ

ChristchurchNZ™

# Canterbury – Capacity vs Occupancy



Source: Statistics NZ

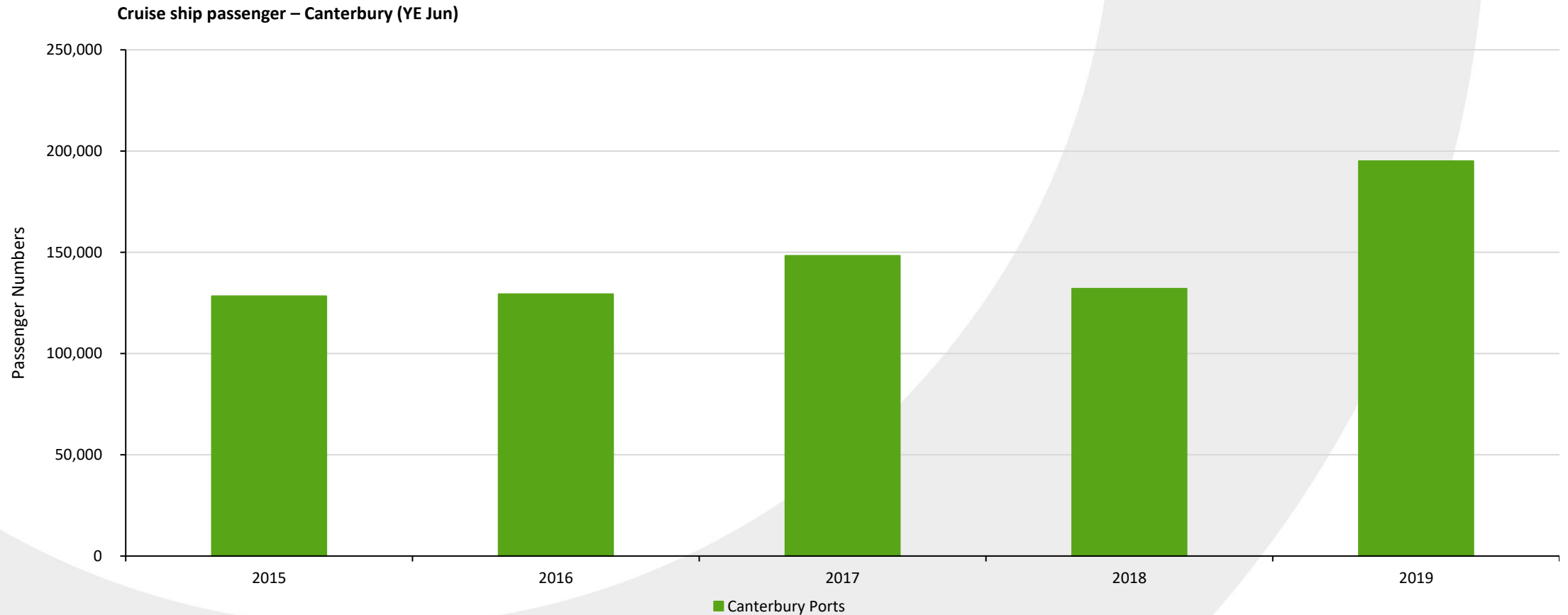
ChristchurchNZ™



# 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.

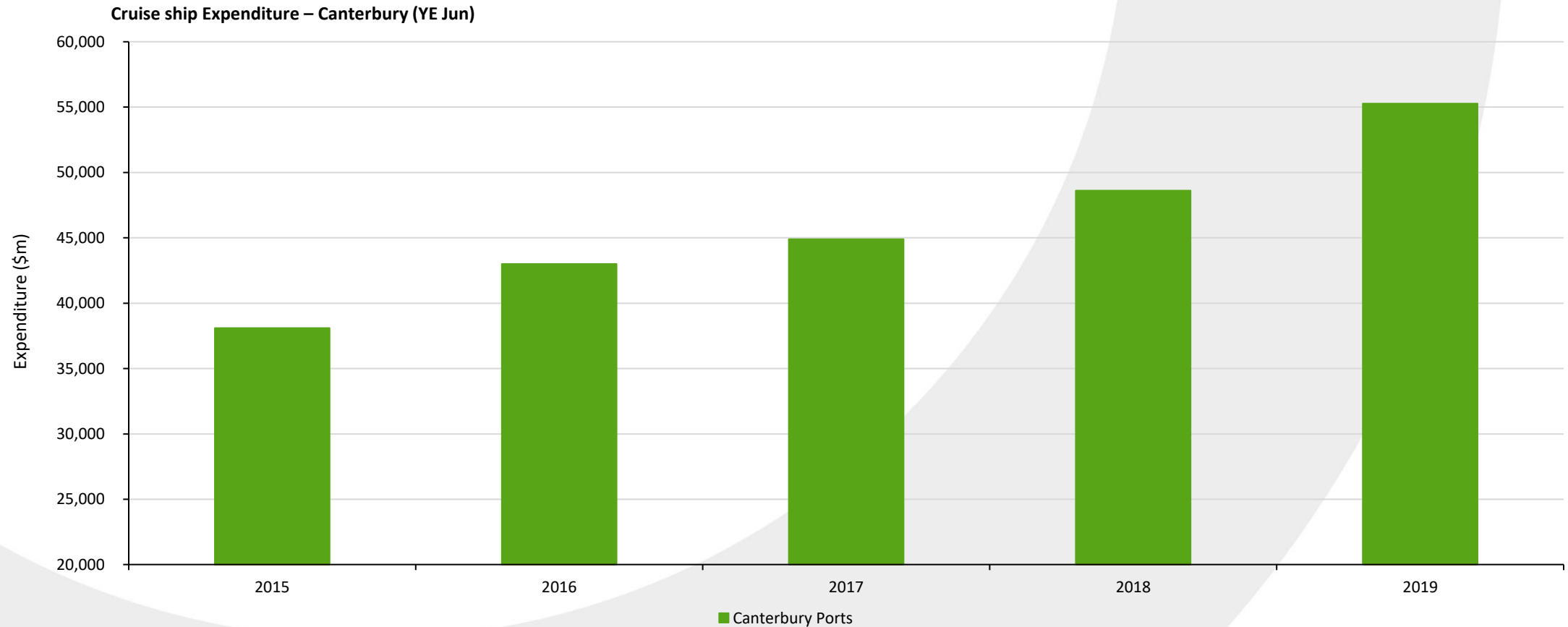
# Cruise Ship Survey



Source: Statistics NZ

ChristchurchNZ™

# Cruise Ship Survey



Source: Statistics NZ

ChristchurchNZ™

# Visitor Attractions

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



**ChristchurchNZ™**