

## Performance Indicators

Visitation / Visitor Days		Visitor Card Spending		Accommodation Occupancy		Tourism-related Employment	
<b>Domestic</b>	<b>International</b>	<b>Domestic</b>	<b>International</b>	<b>Commercial</b>	<b>Short-term Rental</b>	<b>Filled Jobs</b>	<b>Employment Earnings</b>
<b>244K</b>	<b>68K</b>	<b>15.6M\$</b>	<b>3.0M\$</b>	<b>62%</b>	<b>67%</b>	<b>1.8K</b>	<b>6.3M\$</b>
vs. Jan '25	vs. Jan '25	vs. Jan '25	vs. Jan '25	vs. Jan '25	vs. Jan '25	vs. Jan '25	vs. Jan '25
▼ -7%	▲ +21%	▲ +2%	▲ +13%	↑ 4%pt.	↑ 4%pt.	▲ +2%	▼ -1%
All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ
▼ -8%	▲ +12%	▲ +0%	▼ -2%	↑ 2%pt.	↑ 5%pt.	▲ +0%	▼ -6%

## Month at a Glance

- ◆ **Cruise Ship Arrivals:** ▲ +21% International visitor days jump aligns with mid-festival draws and a significant daily arrival spike.
- ◆ **International Expenditure:** ▲ +13% Card spend surge represents an outstanding success, recording the highest growth across the South Island.
- ◆ **Local Events:** ▲ +10% Domestic guest nights lift was likely stimulated by family attractions and motorsport driving regional travel.
- ◆ **Holiday Parks and Campgrounds:** ▲ +20% Guest arrivals surge successfully offset shorter average stays to drive a strong domestic volume recovery.
- ◆ **Accommodation Workforce:** ▲ +13% Filled jobs growth highlights strong sector confidence, supporting the broader local visitor economy expansion.

## Executive Summary

### Guest nights and card spend surge from international visitors, likely from cruise arrivals

Timaru experienced a solid month driven by local events like the Caroline Bay Carnival and international cruise arrivals. For the domestic market, guest nights surged +10% YoY and card spend grew +2% YoY, overcoming a -7% YoY dip in visitor days. For the international market, visitor days jumped +21% YoY and card spend surged +13% YoY. Total filled jobs expanded by +2% YoY.

### Domestic visitor yield increases as international yield contracts

The variation between the decline in domestic visitor days (-7% YoY) and the strong growth in domestic guest nights (+10% YoY) suggested a lower prevalence of day trip visitation. Conversely, the international visitor day surge (+21% YoY) against broader volume indicators suggested a higher prevalence of day trip visitation. Regarding visitor yield, the domestic sector showed that spend grew while visitor days fell, indicating average spend per visitor had increased. In the international sector, visitor days (+21% YoY) grew faster than card spend (+13% YoY), indicating average spend per visitor had decreased.

## Commentary

### **International visitor days outpace unique visitors, indicating more time spent in the region**

Total visitation in Timaru remained relatively stable, with Total Visitor Days dipping slightly (-2% YoY). This result masked a significant divergence between markets; Domestic Visitor Days contracted by -7% YoY, while the international market delivered a strong performance with International Visitor Days surging +21% YoY. Notably, international engagement deepened, with the growth in visitor days outpacing the rise in Unique International Visitors (+14% YoY). This trend indicates that international guests spent more time in the region on average compared to January 2025, a positive outcome that was also reflected in the region's strong growth relative to peer RTOs. A daily peak in visitation on Thursday, January 8th, coincided with the arrival of the Norwegian Spirit cruise ship and the mid-festival draw of the Caroline Bay Carnival, driving a spike in activity.

### **International market share surges as growth offsets the domestic year over year contraction**

Domestic sourcing trends were challenging, with declines recorded across all significant source markets. The primary Canterbury market contracted (-7% YoY), while deeper falls were observed from Otago (-14% YoY) and Waikato (-10% YoY). Even the typically resilient Auckland market dipped slightly (-1% YoY). In contrast, the international market experienced a dynamic reshuffle. The United Kingdom surged to claim the second-highest market share (19% share), effectively replacing the Rest of Europe (-8% YoY), which slipped from second to fourth rank compared to the previous year. Australia also performed strongly, growing +28% YoY to maintain a robust third position (18% share), while the China, Japan & Korea market retained the top spot despite a contraction (-18% YoY).

### **Solid domestic card spend growth signals resilience against peer regions**

Domestic modelled card spend estimates in Timaru delivered solid growth in January, expanding by +2% YoY. This positive result effectively outperformed the flat national average (0% YoY) and sat favourably against the significant contractions seen in peer RTO regions such as Waitaki (-15% YoY) and the Mackenzie Region (-28% YoY). This bounce-back provides strong signs of a resilient January for the local visitor economy, successfully capturing demand following a slightly muted peak domestic spend month in December 2025 when compared with the previous year.

### **International market spend outperforms all other South Island regions**

The region's overseas market was an outstanding success for the month, with international card spend surging by a robust +13% YoY. This performance recorded the highest international card spend growth across all South Island RTO regions, outpacing the broader national decline (-2% YoY) and standing well above other positive performers such as Marlborough (+6% YoY) and the West Coast (+5% YoY).

### **Local events drive surge in guest arrivals and domestic guest nights for accommodation sector**

The commercial accommodation sector in Timaru mirrored the performance of the short-term rental market, with both sectors recording a +4%pt YoY increase in occupancy (commercial reaching 62%). This alignment resulted from a dual dynamic: a tightening of supply, where Available Stay Units contracted -5% YoY, and a robust increase in demand where a +15% YoY surge in Guest Arrivals successfully outshone a -7% YoY contraction in the Average Length of Stay. This growth was almost exclusively driven by the domestic market; Domestic Guest Nights rose +10% YoY, a result noted as the second-largest domestic growth among all South Island RTOs. This surge is likely attributable to strong local event appeal, with major drawcards such as the Caroline Bay Carnival and the Trust Aoraki Thunder Down Under Super Trucks stimulating regional travel.

### **Domestic guest arrivals and guest nights growth focuses on holiday parks and motels**

The domestic-led recovery was most evident in the region's core accommodation providers. Holiday Parks & Campgrounds saw Domestic Guest Nights jump +16% YoY, while Motels & apartments (6-20) recorded a +3% YoY increase from Kiwi visitors. For both categories, the growth mechanic was identical: a significant influx of new visitors offset shorter stays. Holiday Parks saw Guest Arrivals surge +20% YoY against a -6% YoY dip in stay length, while smaller motels experienced an +11% YoY rise in arrivals despite an -11% YoY decline in the average time spent. In contrast, Lodges & Boutique Accommodation struggled, posting declines across all metrics, including a -30% YoY drop in total guest nights.

### **Accommodation and recreation services drive growth in filled jobs**

Total filled jobs in Timaru grew by +2% YoY in January. While a positive result, the region underperformed against the stronger growth reported by peer RTO regions such as Waitaki (+15% YoY) and Hurunui (+5% YoY). Growth within the local visitor economy was supported by good expansion across all significant employment-related industries, with Accommodation experiencing strong double-digit growth (+13% YoY), alongside solid increases in Recreation Services (+5% YoY) and the region's largest contributor, Food and Beverage Services (+3% YoY). However, this momentum was reduced by Transport Services and Activity Services, which both fell -8% YoY.

# Visitation Overview

Venture Timaru - January 2026

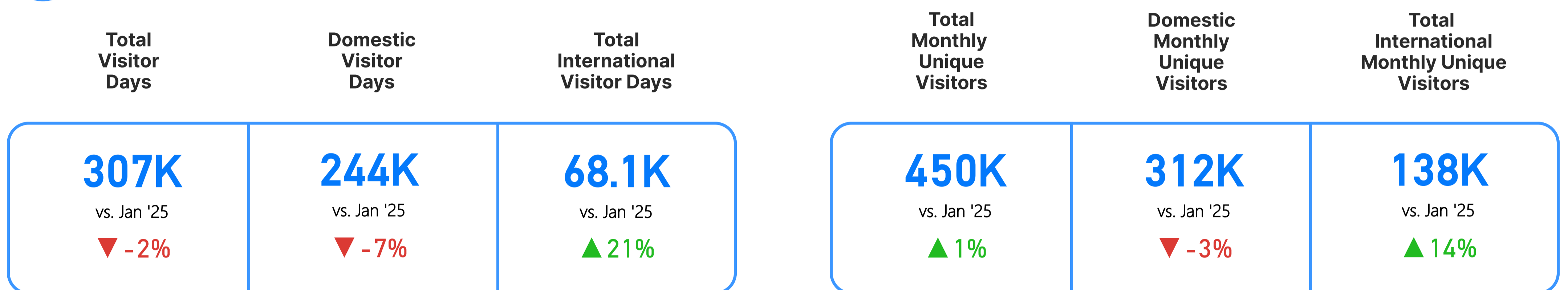
The new TV&F series provides measures of visitor activity and movement across Aotearoa New Zealand, based on presence rather than activity. In other words a visitor does not need to spend money by card, or stay in commercial accommodation to be counted. We're working with MBIE to release further measures from the series and will continue to work to update your dashboards and reports to provide the deepest possible insights from the series.



Total visitation in Timaru remained relatively stable, with Total Visitor Days dipping slightly (-2% YoY). This result masked a significant divergence between markets; Domestic Visitor Days contracted by -7% YoY, while the international market delivered a strong performance with International Visitor Days surging +21% YoY. Notably, international engagement deepened, with the growth in visitor days outpacing the rise in Unique International Visitors (+14% YoY).

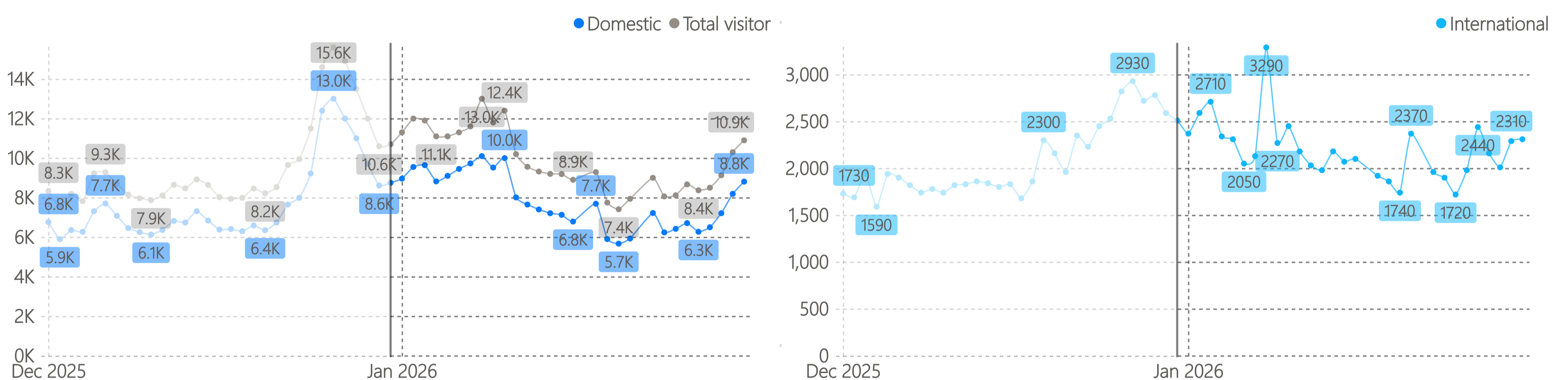


## Visitation

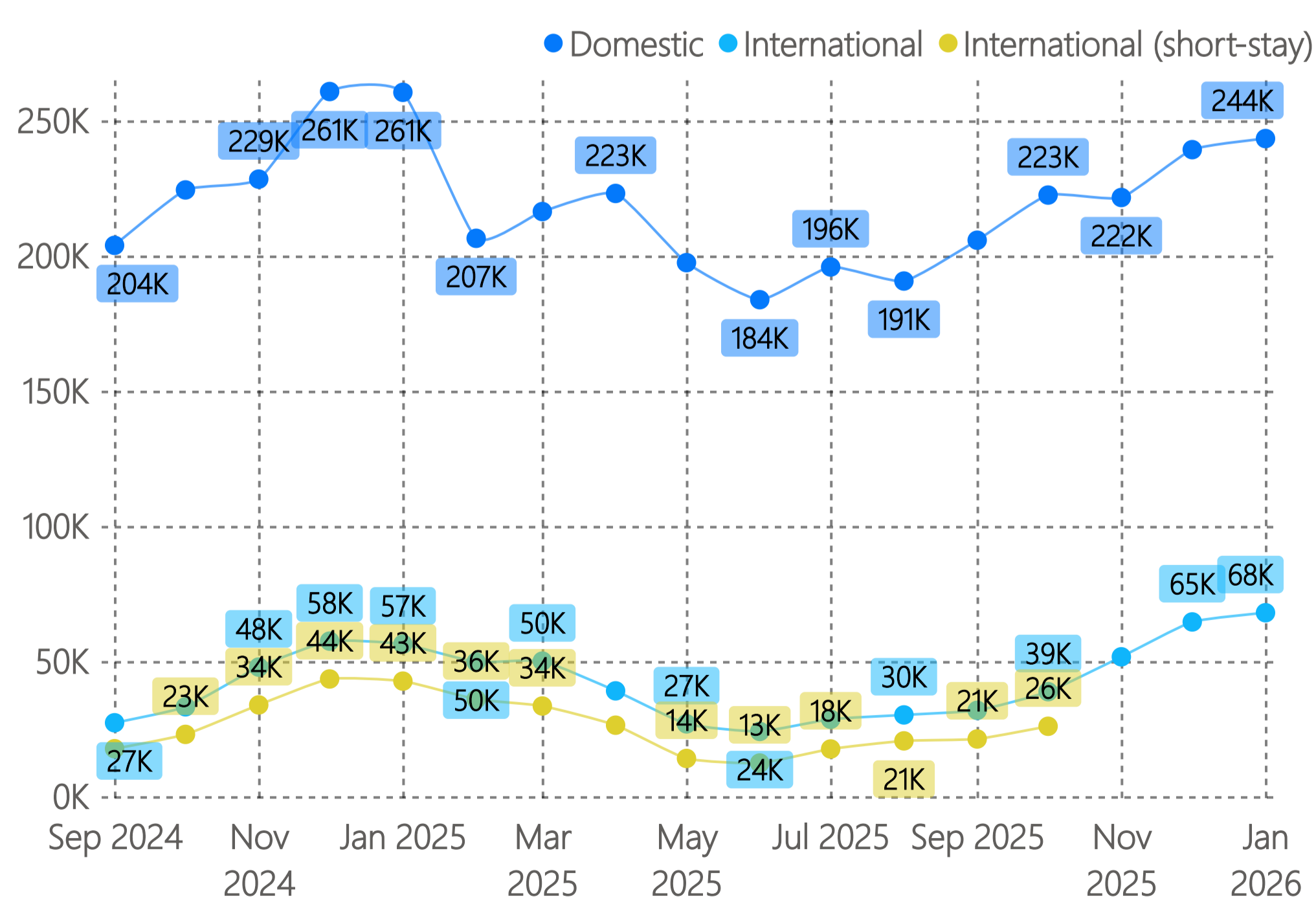


Note: Visitor days represent the cumulative sum of peak daytime visitor counts. To most accurately capture peak daily total visitor counts these are calculated separately from domestic and international, as peak times may vary between the domestic and international visitor populations.

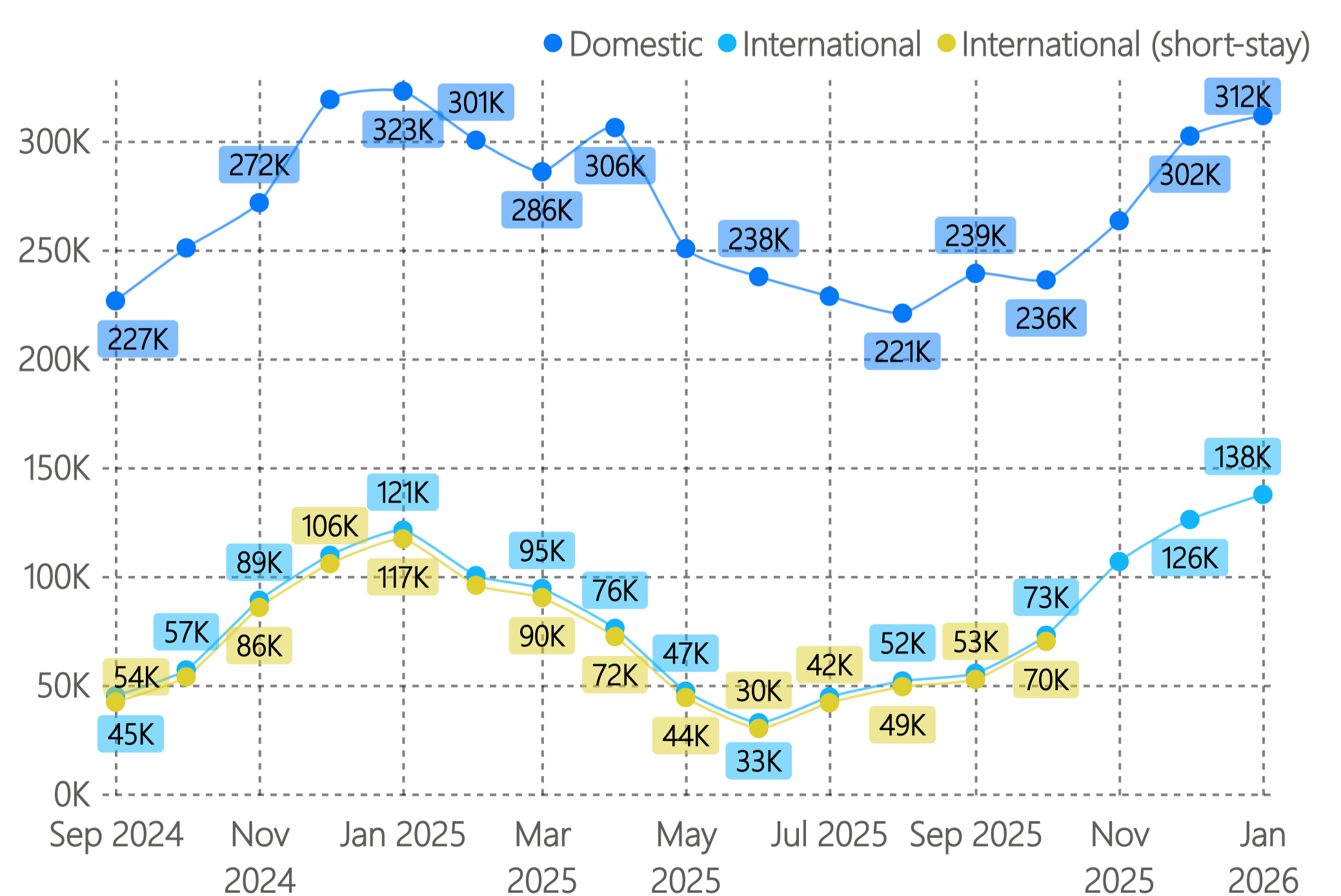
## Peak Daytime Visitor Volume



## Monthly Visitor Days



## Monthly Unique Visitors



# Visitation Overview

Venture Timaru - January 2026

The new TV&F series provides measures of visitor activity and movement across Aotearoa New Zealand, based on presence rather than activity. In other words a visitor does not need to spend money by card, or stay in commercial accommodation to be counted. We're working with MBIE to release further measures from the series and will continue to work to update your dashboards and reports to provide the deepest possible insights from the series.



Total visitation in Timaru remained relatively stable, with Total Visitor Days dipping slightly (-2% YoY). This result masked a significant divergence between markets; Domestic Visitor Days contracted by -7% YoY, while the international market delivered a strong performance with International Visitor Days surging +21% YoY. Notably, international engagement deepened, with the growth in visitor days outpacing the rise in Unique International Visitors (+14% YoY).



## Visitation Benchmark Comparison

### Total Visitor

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	760K		13.8% ▲6%	1.9M		22.5% ▲11%
Queenstown	478K		8.7% ▲2%	959K		11.3% ▲3%
Marlborough	370K		6.7% ▼-1%	787K		9.3% ▼-6%
Nelson Tasman	280K		5.1% ▲2%	753K		8.9% ▲3%
Central Otago	497K		9.0% ▲2%	516K		6.1% ▼-5%
Wanaka	365K		6.6% ▼0%	586K		6.9% ▲3%
Mackenzie	380K		6.9% ▲3%	456K		5.4% ▲5%
Dunedin	300K		5.4% ▼-2%	529K		6.2% ▲2%
Waitaki	488K		8.8% ▼-1%	340K		4.0% ▼-6%
West Coast	289K		5.2% ▲2%	523K		6.2% ▲7%
Timaru	450K		8.1% ▲1%	307K		3.6% ▼-2%
Fiordland	235K		4.2% ▲10%	381K		4.5% ▲10%
Hurunui	407K		7.4% ▼-6%	165K		1.9% ▼-4%
Kaikoura	230K		4.2% ▼-1%	270K		3.2% ▲4%
All NZ	4.4M		▲0%	26.6M		▼-2%

### Domestic

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	505K		14.7% ▲2%	1.0M		20.5% ▼0%
Marlborough	247K		7.2% ▼-7%	570K		11.5% ▼-9%
Central Otago	310K		9.0% ▼-3%	368K		7.5% ▼-9%
Nelson Tasman	194K		5.7% ▼-4%	447K		9.0% ▼-8%
Queenstown	235K		6.8% ▼-4%	360K		7.3% ▼-9%
Dunedin	200K		5.8% ▼-4%	373K		7.6% ▼-4%
Waitaki	311K		9.1% ▼-5%	252K		5.1% ▼-12%
Timaru	312K		9.1% ▼-3%	244K		4.9% ▼-7%
Wanaka	193K		5.6% ▼-9%	344K		7.0% ▼-11%
West Coast	176K		5.1% ▼-5%	288K		5.8% ▼-6%
Mackenzie	199K		5.8% ▼-3%	227K		4.6% ▼-10%
Hurunui	310K		9.1% ▼-9%	101K		2.1% ▼-10%
Kaikoura	152K		4.4% ▼-5%	191K		3.9% ▼-5%
Fiordland	82K		2.4% ▲1%	158K		3.2% ▼-6%
All NZ	3.6M		▼-2%	16.7M		▼-8%

### International

Measure	Unique Visitors			Visitor Days		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month
Canterbury	255K		12.1% ▲12%	910K		25.0% ▲27%
Queenstown	244K		11.6% ▲9%	610K		16.8% ▲12%
Wanaka	172K		8.2% ▲13%	250K		6.9% ▲30%
Mackenzie	180K		8.6% ▲11%	237K		6.5% ▲25%
Nelson Tasman	86K		4.1% ▲20%	312K		8.6% ▲22%
Fiordland	153K		7.3% ▲15%	227K		6.2% ▲26%
West Coast	113K		5.4% ▲15%	239K		6.6% ▲27%
Marlborough	122K		5.8% ▲13%	222K		6.1% ▲4%
Central Otago	187K		8.9% ▲11%	155K		4.3% ▲8%
Waitaki	177K		8.4% ▲5%	93K		2.6% ▲17%
Dunedin	100K		4.8% ▲2%	162K		4.5% ▲17%
Timaru	138K		6.6% ▲14%	68K		1.9% ▲21%
Hurunui	97K		4.6% ▲4%	68K		1.9% ▲10%
Kaikoura	78K		3.7% ▲7%	84K		2.3% ▲31%
All NZ	799K		▲10%	9.9M		▲12%

# Domestic Visitation

Venture Timaru - January 2026

The new TV&F series provides measures of visitor activity and movement across Aotearoa New Zealand, based on presence rather than activity. In other words a visitor does not need to spend money by card, or stay in commercial accommodation to be counted. We're working with MBIE to release further measures from the series and will continue to work to update your dashboards and reports to provide the deepest possible insights from the series.



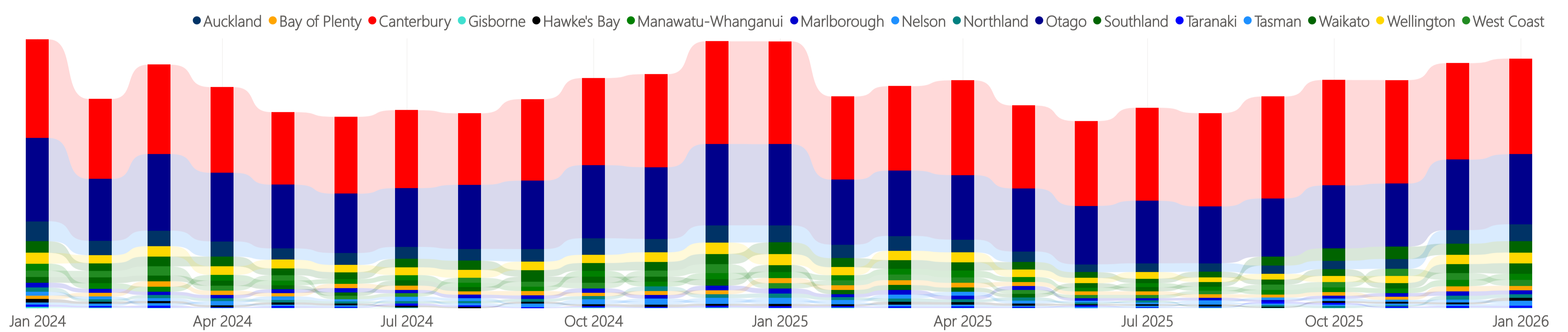
Domestic sourcing trends were challenging, with declines recorded across all significant source markets. The primary Canterbury market contracted (-7% YoY), while deeper falls were observed from Otago (-14% YoY) and Waikato (-10% YoY). Even the typically resilient Auckland market dipped slightly (-1% YoY).



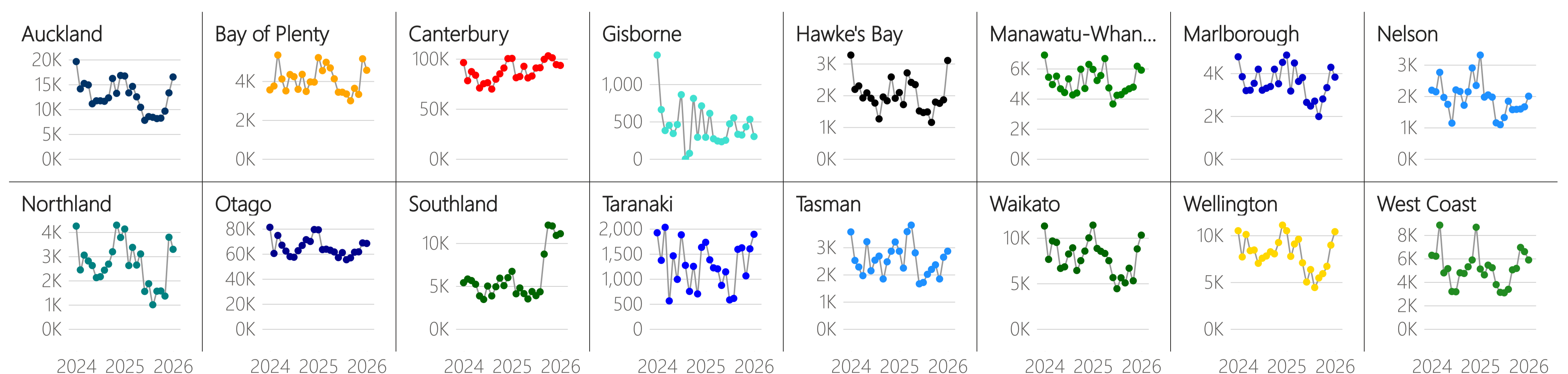
## Domestic Visitation — Table by Market

Visitor Origin by Regional Council	Domestic Visitor Days	Share of Domestic Visitor Days	YoY Domestic Visitor Days
Canterbury	93,400	38.3%	▼-7%
Otago	68,300	28.0%	▼-14%
Auckland	16,500	6.8%	▼-1%
Southland	11,100	4.6%	▲65%
Wellington	10,400	4.3%	▼-1%
Waikato	10,300	4.2%	▼-10%
Manawatu-Whanganui	5,900	2.4%	▼-1%
West Coast	5,880	2.4%	▲15%
Bay of Plenty	4,560	1.9%	▼-12%
Marlborough	3,820	1.6%	▼-21%
Northland	3,290	1.4%	▼-20%
Hawke's Bay	3,100	1.3%	▲48%
Tasman	2,860	1.2%	▲0%
Nelson	2,000	0.8%	▼-40%
Taranaki	1,890	0.8%	▲9%
Gisborne	300	0.1%	▲3%

## Domestic Visitation — Ranked by Market



## Domestic Visitation Trends — by Domestic Market



# International Visitation

Venture Timaru - January 2026

The new TV&F series provides measures of visitor activity and movement across Aotearoa New Zealand, based on presence rather than activity. In other words a visitor does not need to spend money by card, or stay in commercial accommodation to be counted. We're working with MBIE to release further measures from the series and will continue to work to update your dashboards and reports to provide the deepest possible insights from the series.



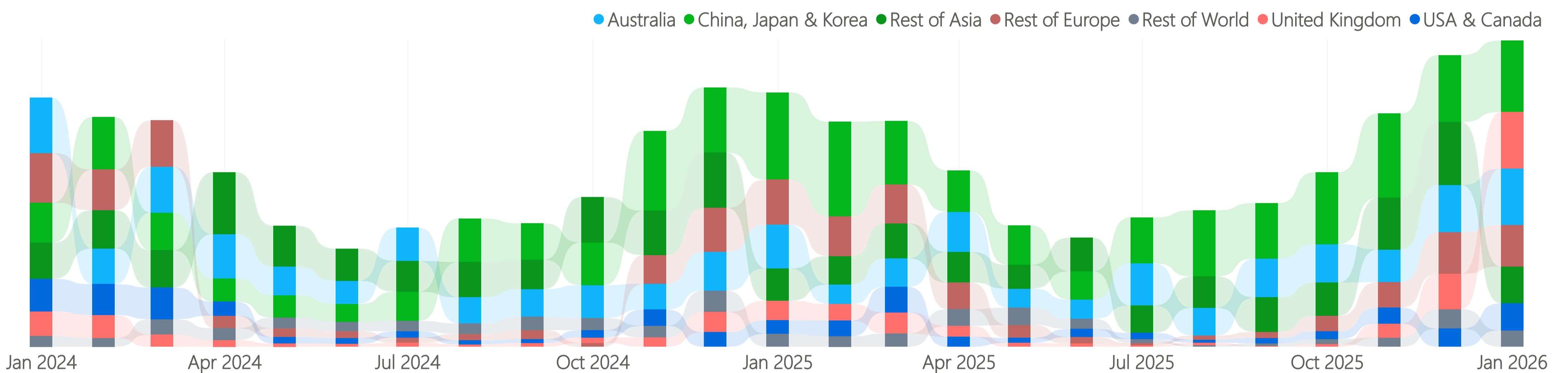
Domestic sourcing trends were challenging, with declines recorded across all significant source markets. The primary Canterbury market contracted (-7% YoY), while deeper falls were observed from Otago (-14% YoY) and Waikato (-10% YoY). Even the typically resilient Auckland market dipped slightly (-1% YoY).



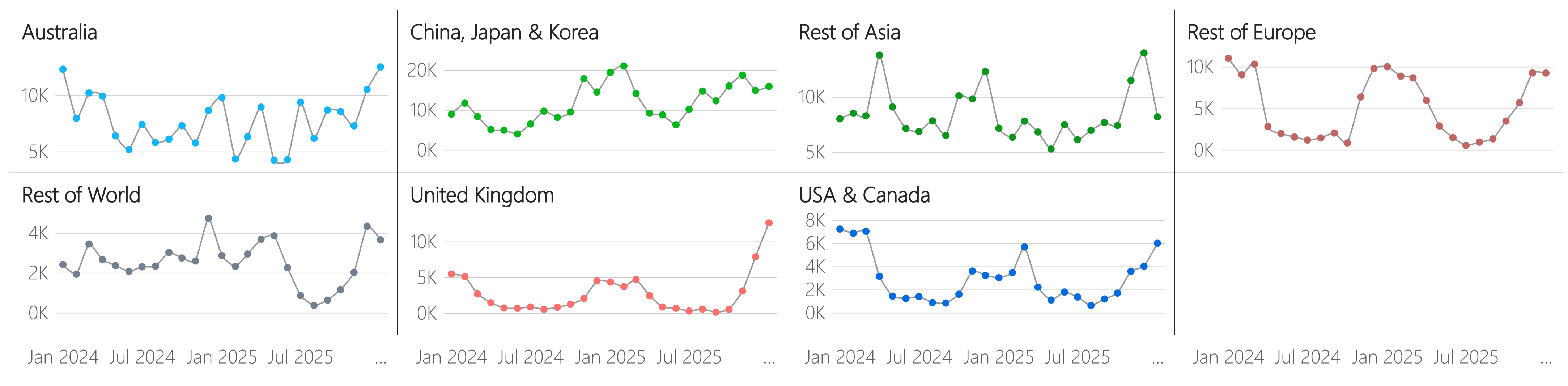
## International Visitation — Table by Market

Overseas markets	International total visitor days	Share of Total International Visitor Days	YoY Total International Visitor Days
China, Japan & Korea	15,900	23.4%	▼-18%
United Kingdom	12,600	18.5%	▲190%
Australia	12,500	18.4%	▲28%
Rest of Europe	9,240	13.6%	▼-8%
Rest of Asia	8,190	12.0%	▲14%
USA & Canada	6,000	8.8%	▲99%
Rest of World	3,650	5.4%	▲28%

## International Visitation — Ranked by Market



## International Visitation Trends — by International Markets



# Card Spend Overview

Venture Timaru - January 2026

Note: Due to a pause in MBIE's TECT data publication, monthly figures for the month of Jan '26 are estimates derived from our proprietary forecasting model; noting that modelling continues to reflect electronic card spending only. This data estimates spending made via electronic cards, broken down by industry categories (ANZSIC Product categories) and source markets. To ensure reporting accuracy, smaller spend categories have been aggregated.



Domestic modelled card spend estimates in Timaru delivered solid growth in January, expanding by +2% YoY. This positive result effectively outperformed the flat national average (0% YoY) and sat favourably against the significant contractions seen in peer RTO regions such as Waitaki (-15% YoY) and the Mackenzie Region (-28% YoY). This bounce-back provides strong signs of a resilient January for the local visitor economy, successfully capturing demand following a slightly muted peak domestic spend month in December 2025 when compared with the previous year.



## Card Spend

Domestic

**15.6M\$**

vs. Jan '25

▲ 2%

International

**3.0M\$**

vs. Jan '25

▲ 13%

Year-Ending Domestic

**179M\$**

vs. Jan '25

▼ -3%

Year-Ending International

**22.1M\$**

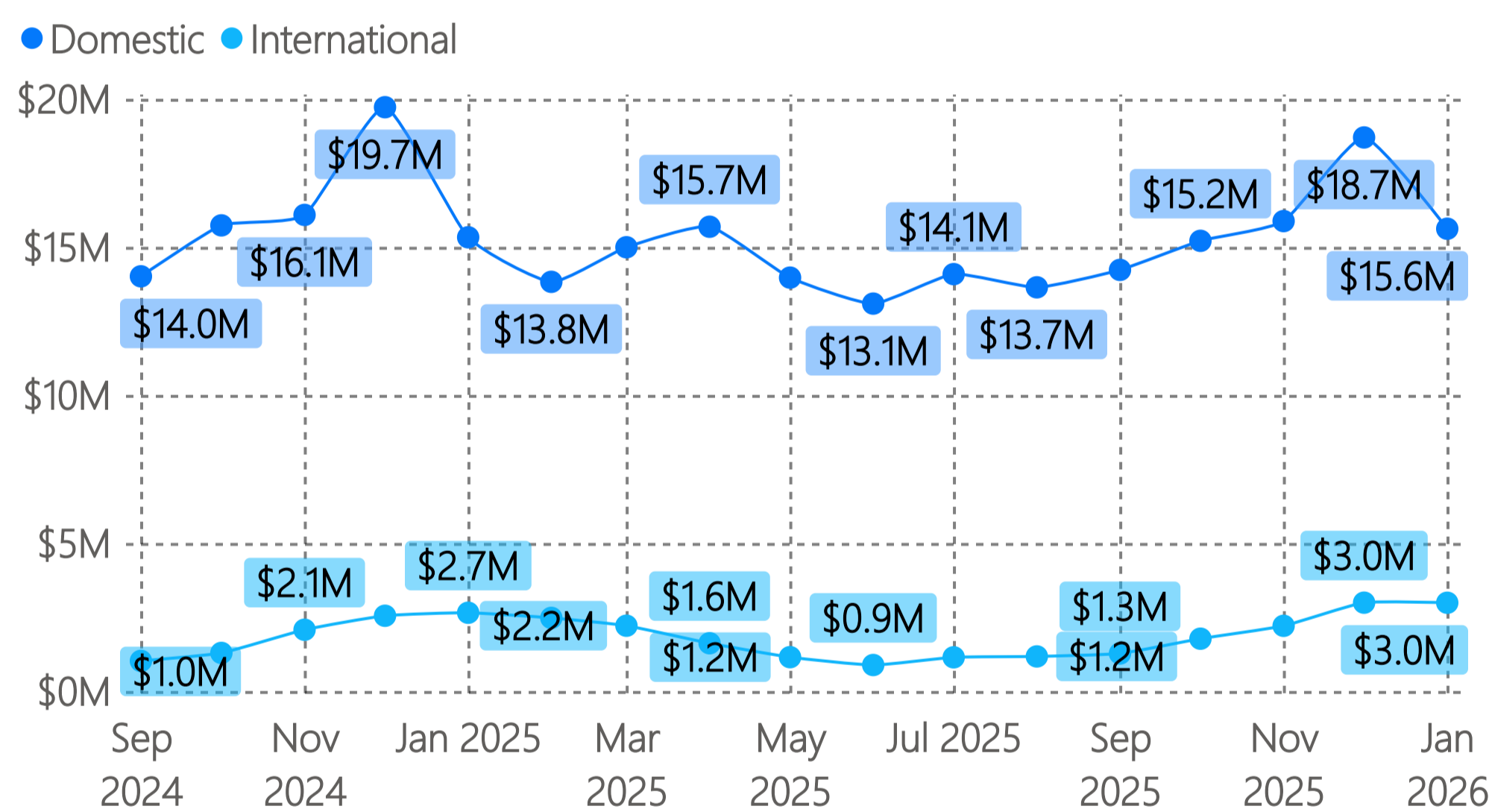
vs. Jan '25

▲ 13%

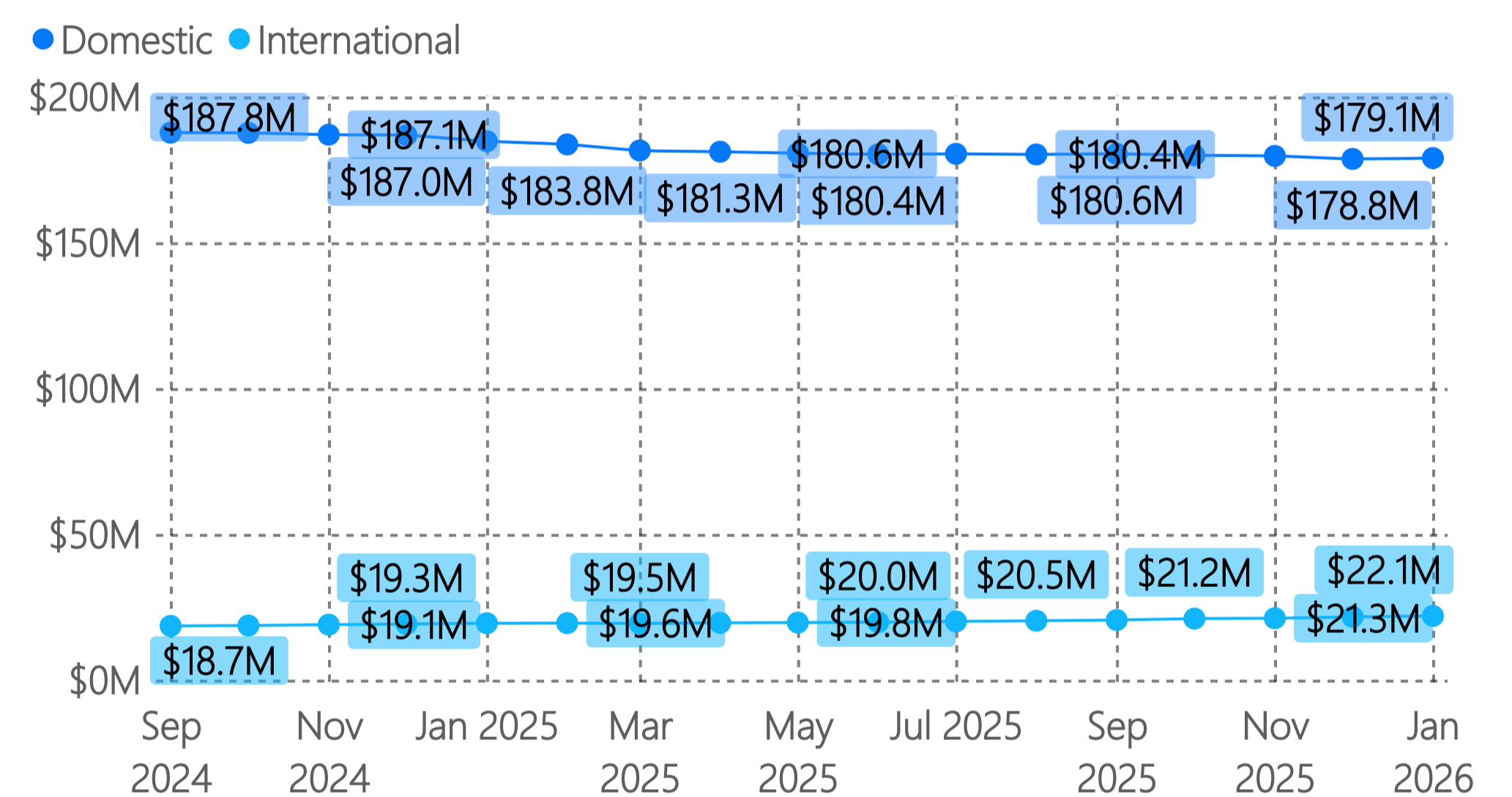


## Card Spend Trends

Monthly Card Spend



Year-Ending Card Spend



## Card Spend Benchmarks



### Domestic Benchmark

RTO	Card Spend Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	84.9M	49.0%	▲9%	923M	53.1%	▼-5%
Marlborough	21.5M	12.4%	▲2%	163M	9.4%	▼0%
West Coast	18.0M	10.4%	▼-11%	150M	8.6%	▼0%
Timaru	15.6M	9.0%	▲2%	179M	10.3%	▼-3%
Waitaki	10.5M	6.0%	▼-15%	110M	6.3%	▲1%
Hurunui	9.7M	5.6%	▼-7%	92.4M	5.3%	▼-1%
Kaikoura	6.9M	4.0%	▲0%	59.9M	3.4%	▲5%
Mackenzie	6.3M	3.6%	▼-28%	60.7M	3.5%	▼-1%
All NZ	1.2B		▲0%	11.1B		▼-3%



### International Benchmark

RTO	Card Spend Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	46.4M	50.6%	▲0%	400M	57.2%	▲6%
West Coast	14.9M	16.3%	▲5%	88.8M	12.7%	▼0%
Mackenzie	9.1M	9.9%	▼0%	68.9M	9.9%	▲5%
Marlborough	8.4M	9.2%	▲6%	52.2M	7.5%	▲2%
Kaikoura	4.6M	5.0%	▼0%	28.4M	4.1%	▼0%
Waitaki	3.0M	3.3%	▼-5%	23.5M	3.4%	▲7%
Timaru	3.0M	3.3%	▲13%	22.1M	3.2%	▲13%
Hurunui	2.3M	2.5%	▼-8%	15.2M	2.2%	▼-8%
All NZ	492M		▼-2%	4.1B		▲5%

# Accommodation Overview

Venture Timaru - January 2026

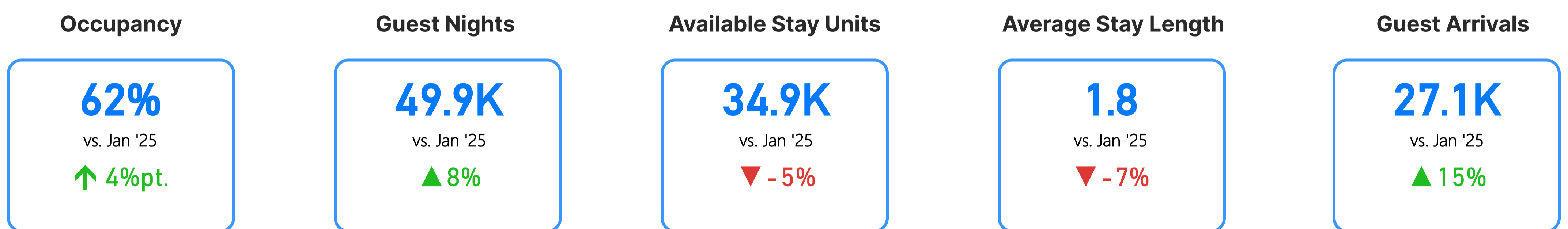
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.



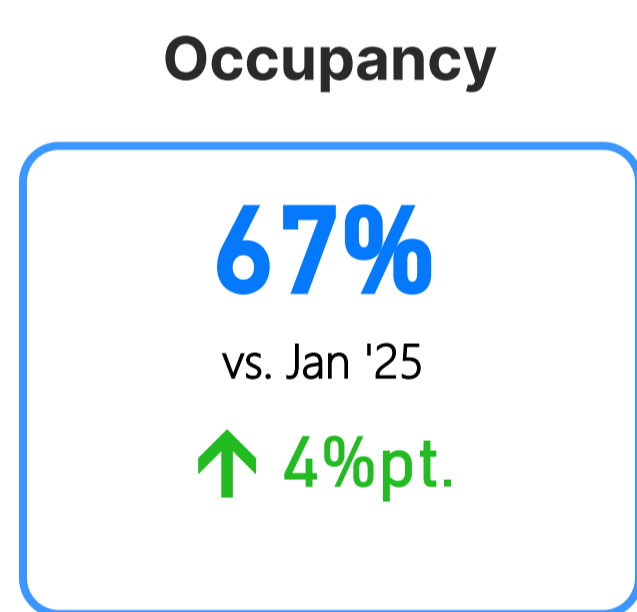
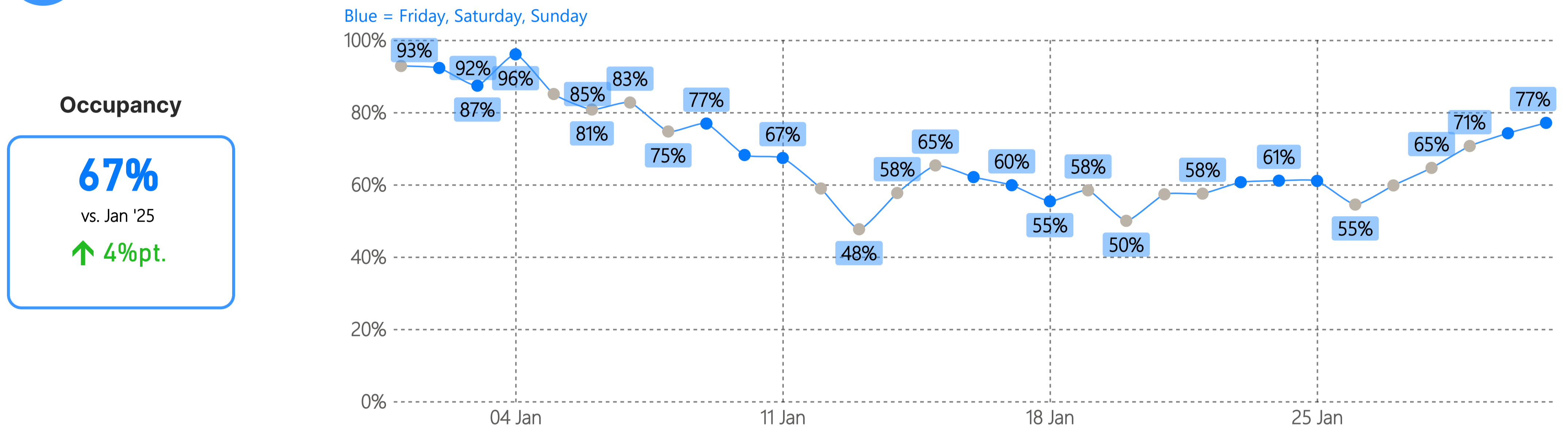
The commercial accommodation sector in Timaru mirrored the performance of the short-term rental market, with both sectors recording a +4%pt YoY increase in occupancy (commercial reaching 62%). This alignment resulted from a dual dynamic: a tightening of supply, where Available Stay Units contracted -5% YoY, and a robust increase in demand where a +15% YoY surge in Guest Arrivals successfully outshone a -7% YoY contraction in the Average Length of Stay. This growth was almost exclusively driven by the domestic market; Domestic Guest Nights rose +10% YoY, a result noted as the second-largest domestic growth among all South Island RTOs.



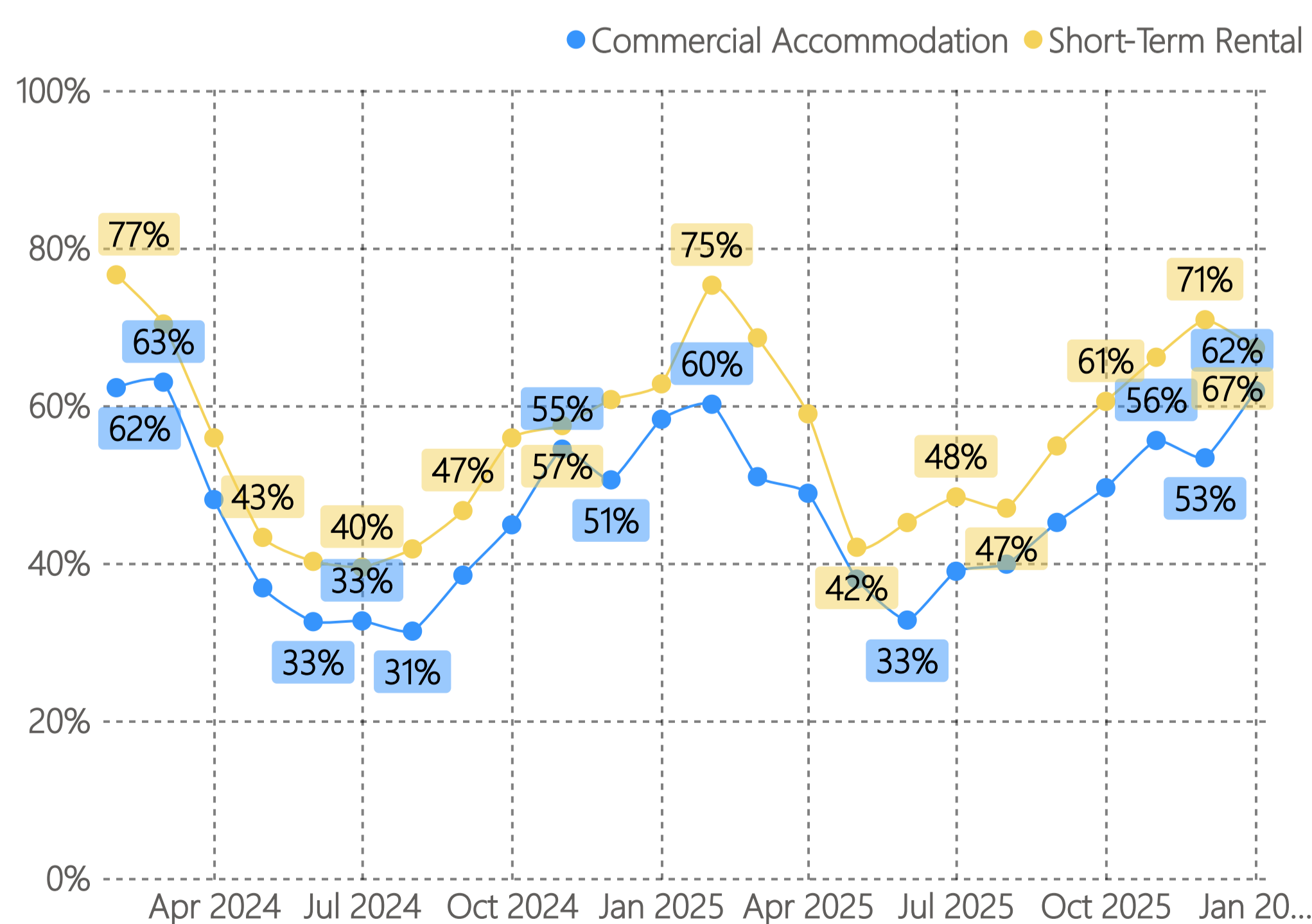
## Commercial Accommodation



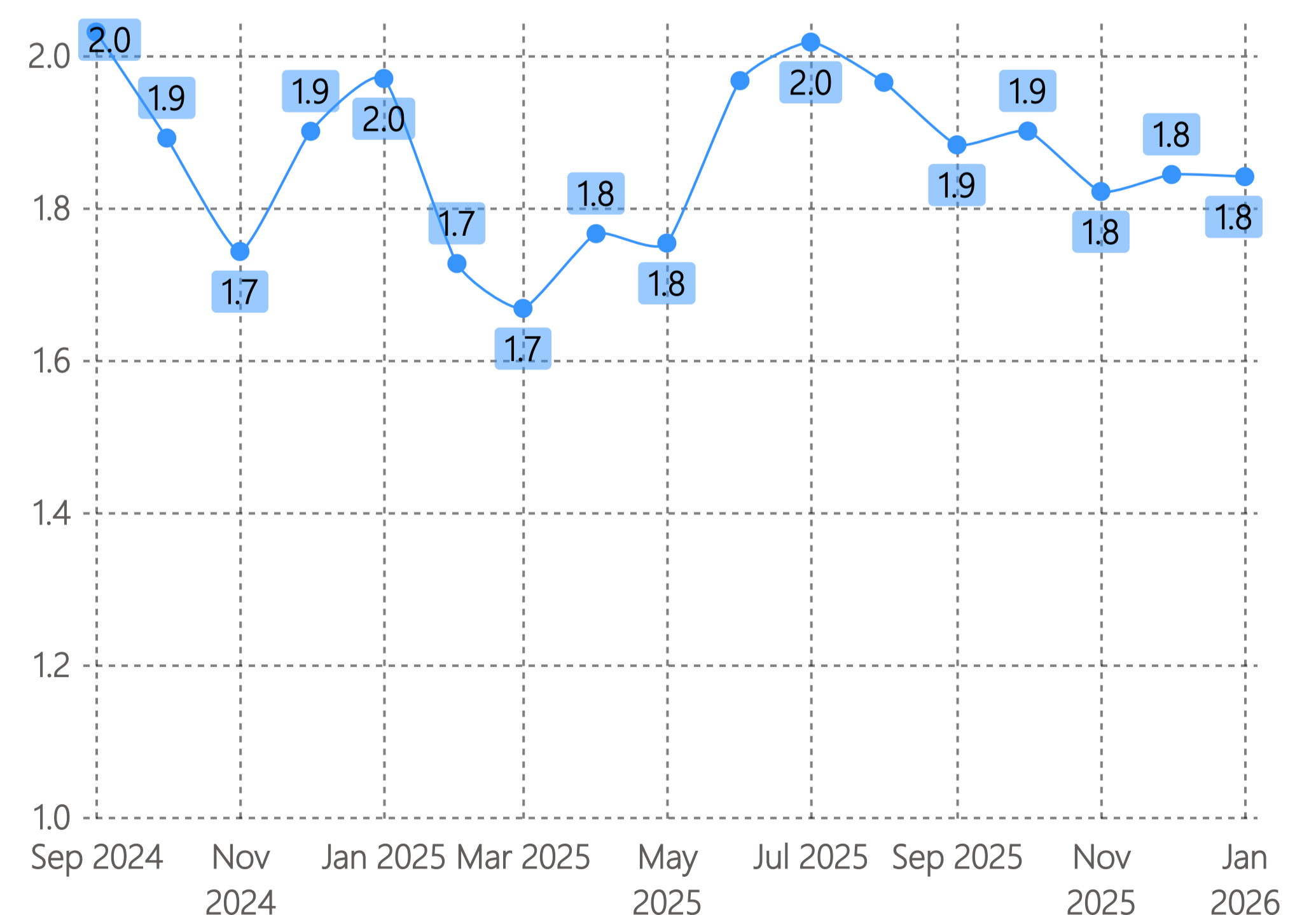
## Short-term Rental Accommodation



## Occupancy



## Average Stay Length in Commercial Accommodation



# Accommodation Overview

Venture Timaru - January 2026

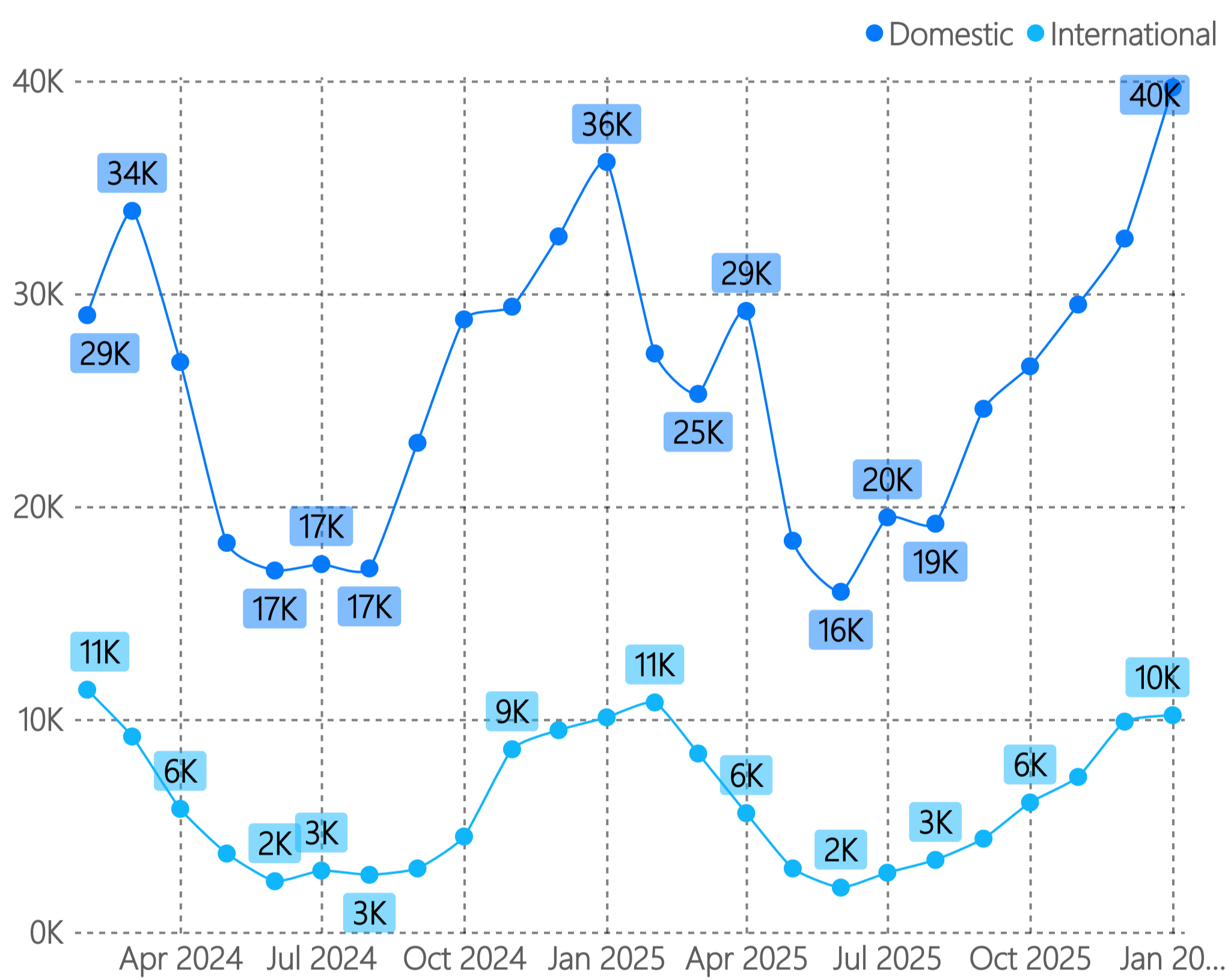
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.



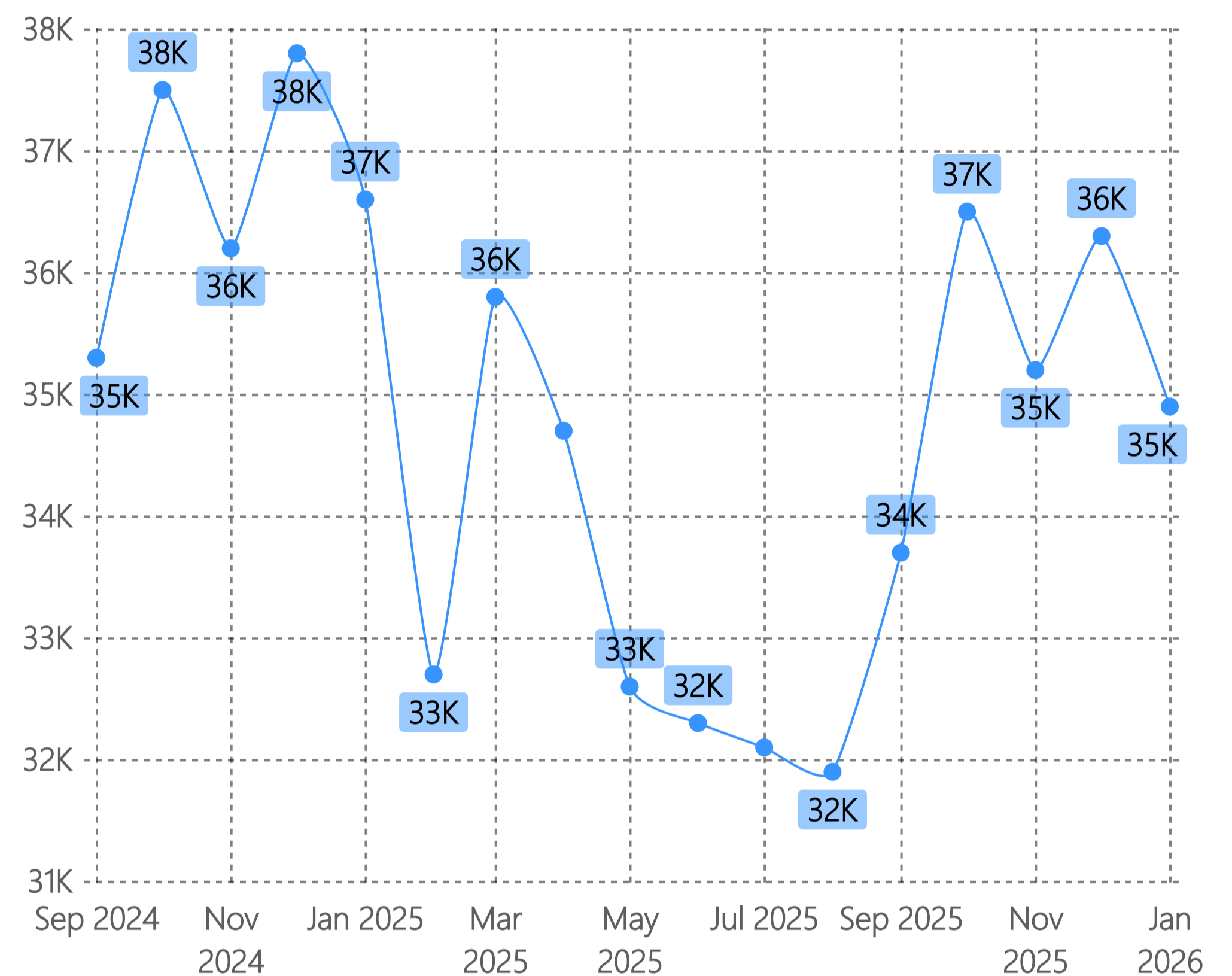
The commercial accommodation sector in Timaru mirrored the performance of the short-term rental market, with both sectors recording a +4%pt YoY increase in occupancy (commercial reaching 62%). This alignment resulted from a dual dynamic: a tightening of supply, where Available Stay Units contracted -5% YoY, and a robust increase in demand where a +15% YoY surge in Guest Arrivals successfully outshone a -7% YoY contraction in the Average Length of Stay. This growth was almost exclusively driven by the domestic market; Domestic Guest Nights rose +10% YoY, a result noted as the second-largest domestic growth among all South Island RTOs.



## Guest Nights in Commercial Accommodation



## Available Monthly Stay Unit Capacity



## Commercial Accommodation Benchmark Comparison



### Domestic Guest Nights

RTO	Guest Nights Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Latest Month	Year-Ending Latest Month
Canterbury	242K	23.7%	▼-3%	2.4M	29.7%	▲0%	
Nelson Tasman	216K	21.1%	▲4%	964K	12.0%	▼0%	
Queenstown	142K	14.0%	▲12%	1.4M	17.3%	▼-2%	
West Coast	87K	8.5%	▼-9%	581K	7.2%	▼-8%	
Dunedin	58K	5.7%	▲9%	613K	7.6%	▲4%	
Marlborough	58K	5.7%	▼-10%	471K	5.9%	▼-3%	
Mackenzie	54K	5.3%	▲14%	393K	4.9%	▼-1%	
Waitaki	48K	4.7%	▲11%	325K	4.0%	▼-1%	
Kaikoura	41K	4.0%	▼-2%	321K	4.0%	▲3%	
Timaru	40K	3.9%	▲10%	308K	3.8%	▼-1%	
Hurunui	36K	3.5%	▼-4%	284K	3.5%	▼-5%	
All NZ	3.4M		▲3%	25.7M		▲0%	



### International Guest Nights

RTO	Guest Nights Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Latest Month	Year-Ending Latest Month
Queenstown	269K	32.7%	▲1%	2.5M	38.7%	▲10%	
Canterbury	198K	24.0%	▲7%	1.5M	23.7%	▲9%	
West Coast	111K	13.5%	▲5%	714K	11.3%	▲5%	
Nelson Tasman	56K	6.8%	▲6%	313K	4.9%	▼0%	
Mackenzie	56K	6.7%	▲14%	409K	6.5%	▲8%	
Kaikoura	31K	3.8%	▼0%	203K	3.2%	▲6%	
Dunedin	30K	3.6%	▲1%	231K	3.7%	▲4%	
Marlborough	28K	3.4%	▲8%	188K	3.0%	▼-1%	
Waitaki	25K	3.0%	▲21%	175K	2.8%	▲15%	
Timaru	10K	1.2%	▲1%	74K	1.2%	▲0%	
Hurunui	10K	1.2%	▲1%	69K	1.1%	▼-3%	
All NZ	1.9M		▲7%	14.3M		▲6%	

## Accommodation by Type

Venture Timaru - January 2026

Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.

“

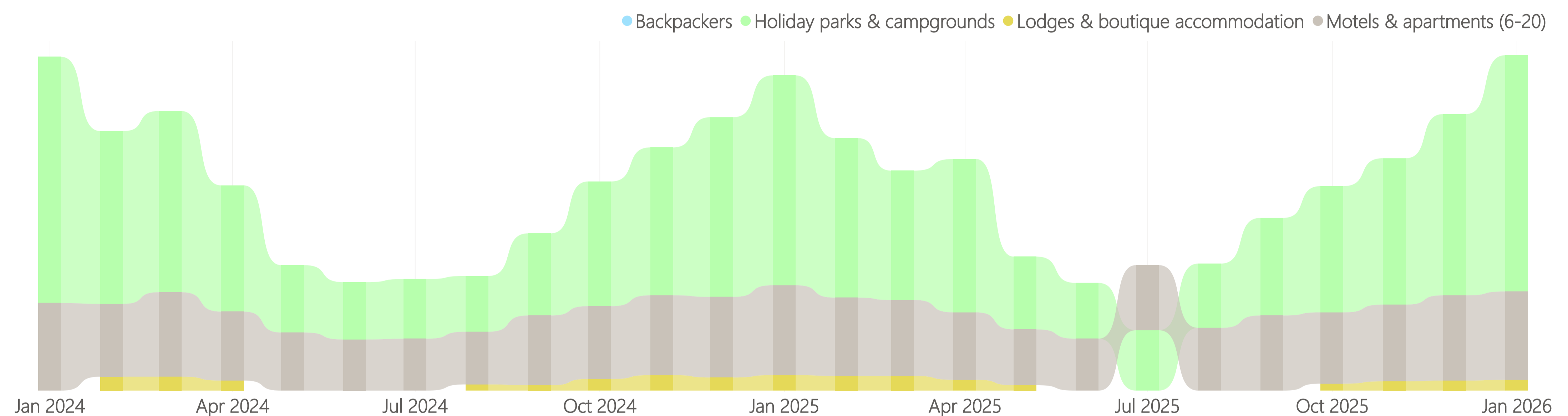
The domestic-led recovery was most evident in the region's core accommodation providers. Holiday Parks & Campgrounds saw Domestic Guest Nights jump +16% YoY, while Motels & apartments (6-20) recorded a +3% YoY increase from Kiwi visitors. For both categories, the growth mechanic was identical: a significant influx of new visitors offset shorter stays.

”

### Accommodation Type Overview

Accommodation Type	Guest Arrivals	Share of Guest Arrivals	YoY Guest Arrivals	Guest Nights	Share of Guest Nights	YoY Guest Nights	Average Stay Length	YoY Average Stay Length	Available Stay Units	YoY Available Stay Units	Occupancy	YoY Occupancy
Holiday parks & campgrounds	16,800	70.3%	▲20%	30,600	70.5%	▲13%	1.8	▼-6%	20,000	▼-9%	0.58	▲7%pt.
Motels & apartments (6-20)	6,200	25.9%	▲11%	11,400	26.3%	▼-2%	1.8	▼-11%	7,800	▲4%	0.70	▼-3%pt.
Lodges & boutique accommodation	900	3.8%	▼-10%	1,400	3.2%	▼-30%	1.6	▼-22%	1,300	▼-28%	0.53	▼-1%pt.
Backpackers	0	0.0%	-	0	0.0%	-	-	-	0	-	-	-
Hotels	-	-	-	-	-	-	-	-	-	-	-	-
Motels & apartments (>20)	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>27,100</b>		<b>▲15%</b>	<b>49,900</b>		<b>▲8%</b>	<b>1.8</b>	<b>▼-7%</b>	<b>34,900</b>	<b>▼-5%</b>	<b>0.62</b>	<b>▲4%pt.</b>

### Total Guest Nights — Ranked by Accommodation Type



### Accommodation Type by Market

Accommodation Type	Domestic Guest Nights	Share of Domestic Guest Nights	YoY Domestic Guest Nights	Inter. Guest Nights	Share of Inter. Guest Nights	YoY Inter. Guest Nights	Total Guest Nights	Share of Total Guest Nights	YoY Total Guest Nights
Holiday parks & campgrounds	25,300	71.7%	▲16%	5,300	65.4%	▲2%	30,600	70.5%	▲13%
Motels & apartments (6-20)	9,300	26.3%	▲3%	2,100	25.9%	▼-19%	11,400	26.3%	▼-2%
Lodges & boutique accommodation	700	2.0%	▼-22%	700	8.6%	▼-36%	1,400	3.2%	▼-30%
Backpackers	0	0.0%	-	0	0.0%	-	0	0.0%	-
Hotels	-	-	-	-	-	-	-	-	-
Motels & apartments (>20)	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>39,700</b>		<b>▲10%</b>	<b>10,200</b>		<b>▲1%</b>	<b>49,900</b>		<b>▲8%</b>

# Accommodation by Type

Venture Timaru - January 2026

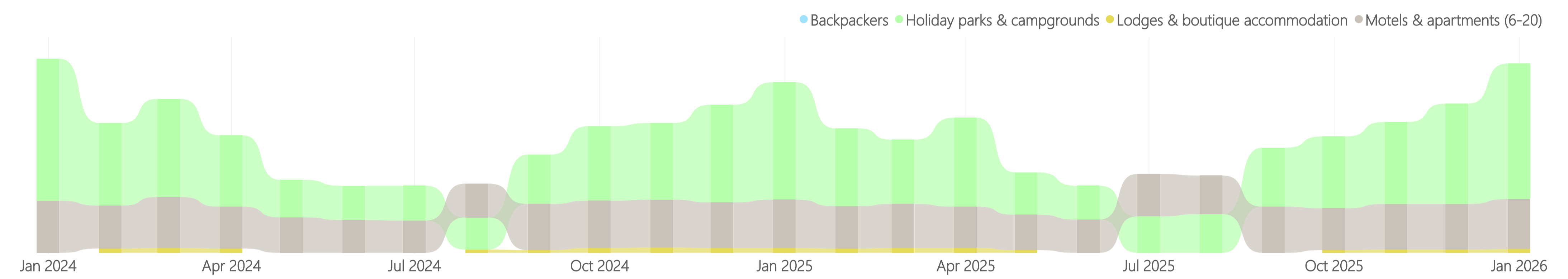
Accommodation data is categorised into commercial and short-term rentals due to their distinct reporting methods. Commercial accommodation tracks guest nights, representing the total number of individual guests per night. In contrast, short-term rentals report booked nights, reflecting the total nights reserved, regardless of the number of occupants.



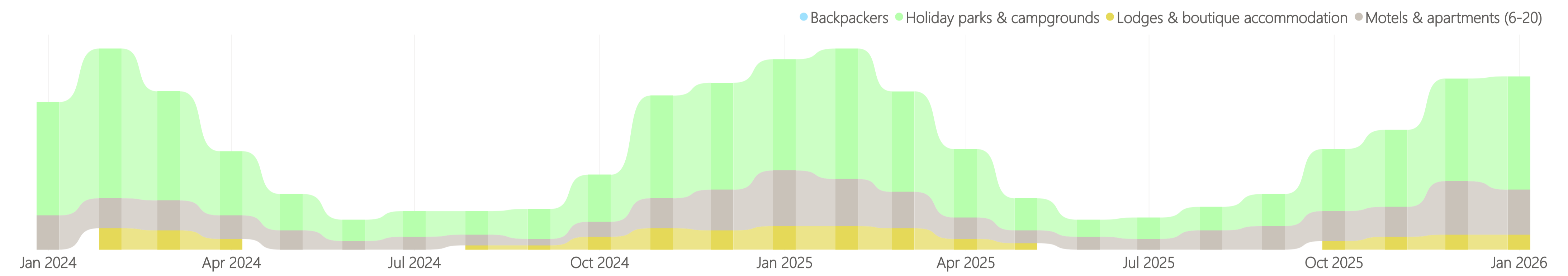
The domestic-led recovery was most evident in the region's core accommodation providers. Holiday Parks & Campgrounds saw Domestic Guest Nights jump +16% YoY, while Motels & apartments (6-20) recorded a +3% YoY increase from Kiwi visitors. For both categories, the growth mechanic was identical: a significant influx of new visitors offset shorter stays.



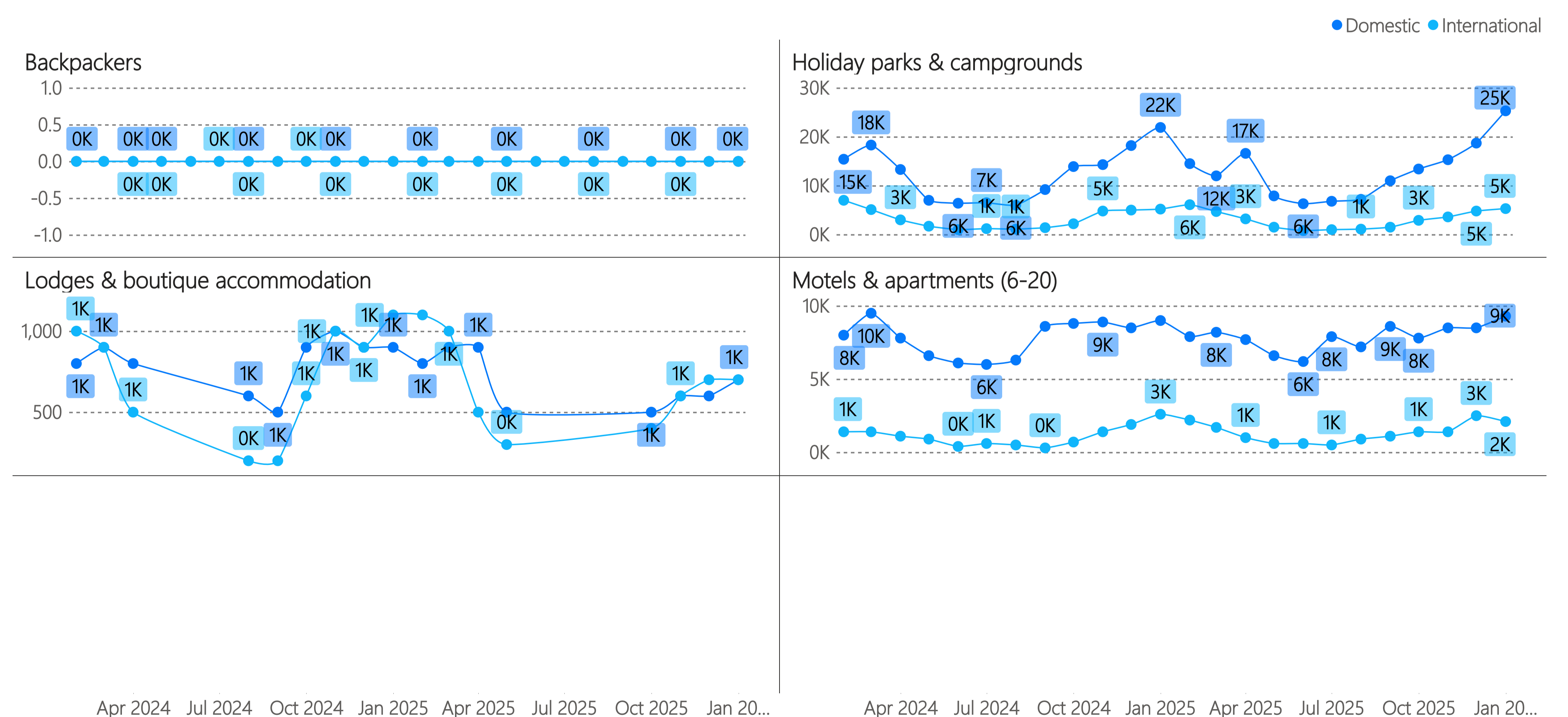
## Domestic Guest Nights — Ranked by Accommodation Type



## International Guest Nights — Ranked by Accommodation Type



## Guest Nights — Trends by Market



# Employment Overview

## Economic Indicator Data by Industry for January 2026

Employment statistics from select tourism-related industries are used as a gauge for tourism's regional economic contribution. While not a comprehensive measure of all tourism employment, it does provide insights into filled job numbers and earnings within those specified industries.



Total filled jobs in Timaru grew by +2% YoY in January. While a positive result, the region underperformed against the stronger growth reported by peer RTO regions such as Waitaki (+15% YoY) and Hurunui (+5% YoY). Growth within the local visitor economy was supported by good expansion across all significant employment-related industries, with Accommodation experiencing strong double-digit growth (+13% YoY), alongside solid increases in Recreation Services (+5% YoY) and the region's largest contributor, Food and Beverage Services (+3% YoY).

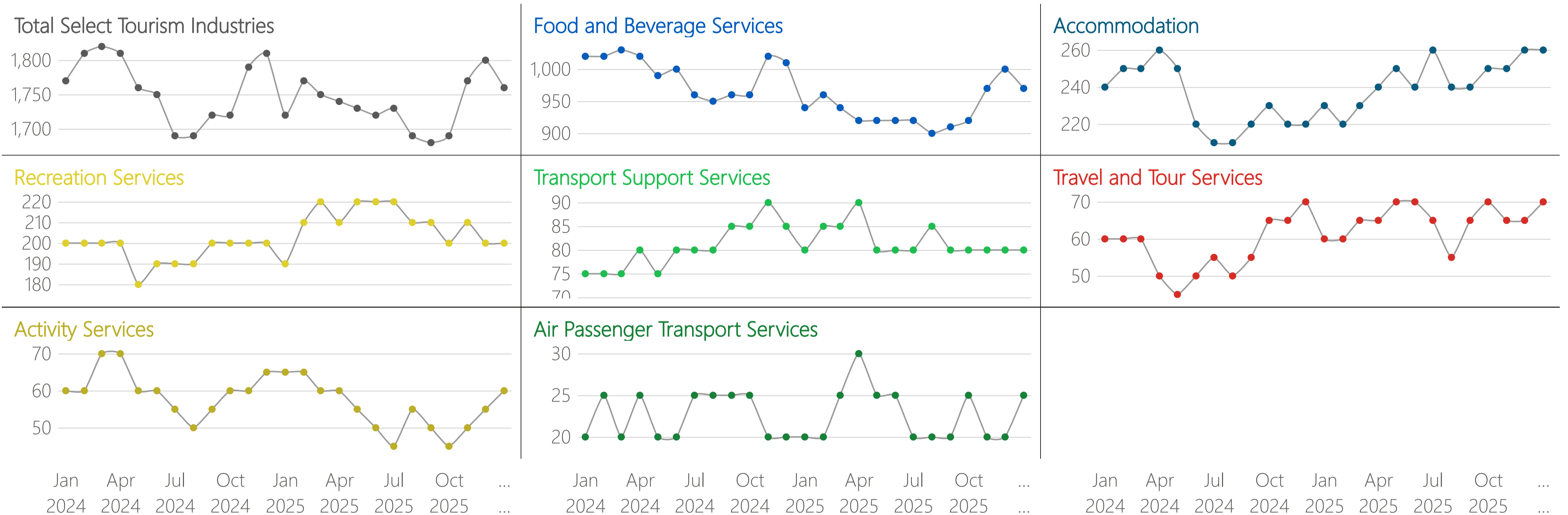


### Month at a Glance

Industry	Filled Jobs	Share of Filled Jobs	YoY Filled Jobs	Employment Earnings	Share of Employment Earnings	YoY Employment Earnings
Total Select Tourism Industries	1,760		▲2%	\$6.328M		▼-1%
Food and Beverage Services	970	54.6%	▲3%	\$3.214M	50.8%	▲5%
Accommodation	260	14.6%	▲13%	\$0.719M	11.4%	▲15%
Recreation Services	200	11.3%	▲5%	\$0.719M	11.4%	▼-15%
Transport Services	110	6.2%	▼-8%	\$0.379M	6.0%	▲0%
Transport Support Services	80	4.5%	▲0%	\$0.443M	7.0%	▼-11%
Travel and Tour Services	70	3.9%	▲17%	\$0.347M	5.5%	▲1%
Activity Services	60	3.4%	▼-8%	\$0.304M	4.8%	▼-9%
Air Passenger Transport Services	25	1.4%	▲25%	\$0.203M	3.2%	▼-28%
Confidentiality Residual	-	-	-	-	-	-



### Monthly Filled Jobs by Industry



### Filled Jobs in Tourism-Related Industries

RTO	Filled Jobs Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Average Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	28,350	73.1%	▲2%		74.3%	▲2%
Marlborough	3,220	8.3%	▲3%		8.0%	▲1%
West Coast	2,300	5.9%	▲4%		5.6%	▲0%
Timaru	1,760	4.5%	▲2%		4.6%	▼-1%
Waitaki	1,090	2.8%	▲15%		2.6%	▲5%
Hurunui	870	2.2%	▲5%		2.1%	▼-1%
Mackenzie	730	1.9%	▼-1%		1.8%	▼-2%
Kaikoura	450	1.2%	▲7%		1.0%	▲2%
All NZ	491,668		▲0%			▲0%



### Employment Earnings in Tourism-Related Industries

RTO	Employment Earnings Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	Year-Ending Latest Month	Relative Share of Market - Year-Ending	YoY Year-Ending Latest Month
Canterbury	\$128M	75.5%	▼-8%	\$1.6B	77.1%	▲3%
Marlborough	\$12.7M	7.5%	▼-3%	\$145M	7.1%	▼-4%
West Coast	\$9.4M	5.5%	▼0%	\$104M	5.1%	▲3%
Timaru	\$6.3M	3.7%	▼-1%	\$75.5M	3.7%	▲5%
Waitaki	\$3.9M	2.3%	▲13%	\$41.2M	2.0%	▲6%
Hurunui	\$3.7M	2.2%	▼-3%	\$42.3M	2.1%	▲3%
Mackenzie	\$3.6M	2.1%	▼-3%	\$40.3M	2.0%	▲3%
Kaikoura	\$1.8M	1.1%	▼-6%	\$19.0M	0.9%	▲3%
All NZ	\$2.2B		▼-6%	\$26.8B		▲3%

## About & Definitions

This report is compiled on behalf of Venture Timaru by Vistr Limited based on a range of publicly available and proprietary datasets and insights series. A summary of these is provided below.

### Tourism Volumes and Flows (TV&F)

Tourism Volumes and Flows (TV&F) is a national insight series that uses multiple anonymised mobility data sets drawn from multiple sources, including cell tower "pings" and app-based GPS data, combined with official population and travel statistics to estimate visitor numbers (volumes) and origin market distributions (flows). It provides high-resolution insights into long-term behavioural trends around visitation, and regional engagement (to daily event level).

**Measures:** Includes Daily Peak Visitor Volumes (highest estimated count during daylight hours, Visitor Days (total days spent by all visitors), Total Monthly Unique Visitors (estimated individual visitors), Visitor Days by Origin (flow from home region/country to destination), and Peak Daytime Population Data is currently available down to the Territorial Authority (TA) level. The series is engineered by [Vistr](#) and published by [MBIE](#).

### Tourism Electronic Card Transactions (TECT)

Tourism Electronic Card Transaction (TECT) spend data represent in region electronic card spend only (not including cash spend, pre-visit and/or online spend). Electronic card spend is collected by [Worldline](#) and [EFTPOS NZ](#), and provided by [MBIE](#). As spend figures are derived solely from electronic card transactions, caution is advised when comparing spend distribution by visitor market, given varying cash usage among visitor markets.

**Measures:** Tracks Electronic Card Spend (in-region credit/debit/EFTPOS), further segmented by product (industry categories) and origin (visitor's home location).

**Technical Notes:** Represents in-person card spend only, excluding cash or online purchases. Domestic spend is defined by the 40km Rule (purchases made 40km+ from home TA). Data is provided down to the TA level.

### Accommodation Data Programme (ADP)

Commercial accommodation data is based on survey data submitted by participating accommodation providers, compiled by [Fresh Info](#) and hosted by [MBIE](#).

**Measures:** Tracks Guest Nights (sum of daily stays), Guest Arrivals (total individual guests), Occupancy Rate (percentage of capacity used), Available Stay Units (daily capacity), and Average Stay Length. Includes breakdown by accommodation type: Hotels, Motels/Apartments (self-contained), Backpackers (shared facilities), Holiday Parks (sites/cabins), and Lodges/Boutique (high-end/country hotels).

**Technical Notes:** Based on commercial providers with 6+ stay units. Excludes emergency housing and MIQ. Reliability is graded by star ratings (Confidence Intervals: 3-star +/-5% to 1-star +/-15%). Data is provided at the TA level.

### Short Term Rental Accommodation (STRA) Data (Occupancy)

Compiled by Vistr based on daily sourcing of online stock and availability data of properties listed across key STRA platforms including Airbnb, VRBO/Bookabach and Bachcare.

**Measure:** Exclusively tracks the **Daily Occupancy Rate**, which is calculated as the ratio between the number of daily booked properties and the total available properties across platforms.

**Technical Notes:** Occupancy is modelled based on daily web-sourced availability and listing data gathered from key short-term rental platforms including Airbnb, VRBO/Bookabach and Bachcare. Raw availability data is processed to account for factors including owner/host occupation periods and changeover days between guest stays, producing a net occupancy estimate that reflects actual guest usage rather than simply listed unavailability.

### Employment Indicators

Employment data is collected from [Inland Revenue](#)'s Employer Monthly Schedule and payday filing, engineered by [Stats NZ](#) and subject to further modelling by [Vistr](#). The data represents employment in select tourism-related industries, but not overall tourism employment.

**Measures:** Tracks Filled Jobs (paid jobs in a month) and Gross Earnings (total pre-tax earnings including bonuses).

**Technical Notes:** Data is sourced from IRD payday filing and presented for select tourism-related industries down to the TA level for the month in which they were paid. Figures remain provisional for three months to allow for filing adjustments.

### International Visitor Arrivals (IVA)

Border crossing data tracks border crossings by port of arrival, visa type, travel intent and intended stay length. The weekly provisional, otherwise monthly data is collected by [Immigration New Zealand](#), engineered and provided by [Stats NZ](#).

**Measures:** Tracks International Visitor Arrivals and Vacating International Visitors.

**Technical Notes:** Segmented by Country of Origin and Arrival Port. Data is rounded to the nearest 10 with totals potentially differing slightly due to rounding.

### Business Events Data Programme (BEDP)

Business events data is based on survey data submitted by participating venues. The programme is managed by [Fresh Info](#) on behalf of [BEIA](#) and funded jointly by BEIA, RTONZ, and Tourism New Zealand.

**Measures:** Includes Delegate Days (sum of daily attendee counts), Unique Delegates (one count per person per event), and Events (Based on MICE - see technical note)

**Technical Note:** Only records MICE events (Meetings, Incentives, Conferences, Exhibitions) hosted in professional venues with a threshold of at least 50 attendees.

This report has been prepared by Vistr Limited on behalf of Venture Timaru with care and in good faith, drawing on the data sources and methodologies described in the About & Definitions section. While every reasonable effort has been made to ensure accuracy, data of this nature is subject to revision, methodological constraints, and the inherent limitations of estimation. Venture Timaru and Vistr Limited accept no liability for decisions made in reliance on this report. Readers are encouraged to consider findings in the context of the supporting commentary and definitions provided.  
If you have any questions or believe you have identified an error, please contact [hello@vistr.nz](mailto:hello@vistr.nz).