

## Performance Indicators

Visitation / Visitor Days		Visitor 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>191K</b>	<b>62K</b>	<b>28.9M\$</b>	<b>9.9M\$</b>	<b>73%</b>	<b>81%</b>	<b>1.8K</b>	<b>6.3M\$</b>
vs. Feb '25	vs. Feb '25	vs. Feb '25	vs. Feb '25	vs. Feb '25	vs. Feb '25	vs. Feb '25	vs. Feb '25
▼ -8%	▲ 24%	▼ -3%	▲ 37%	▲ 13%pt.	▲ 6%pt.	▲ 2%	▲ 8%
All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ	All NZ
▼ -6%	▲ 12%	▲ 8%	▲ 18%	▲ 4%pt.	▲ 1%pt.	▲ 1%	▲ 4%

## Month at a Glance

- International visitor days ▲+24% YoY, third highest growth among South Island RTOs, drove the regional headline
- Domestic visitor days ▼-8% YoY, with the two largest source markets (Canterbury and Otago) both softening
- Occupancy rate reached 73% (▲+13%pt. YoY), second highest in the South Island, despite reduced available capacity
- International spend ▲+37% YoY, second in the South Island, suggests rising yield from the growing visitor base
- Tourism earnings ▲+8% YoY, led by Accommodation which posted strong jobs and earnings growth

## Commentary

### February marked a strong month for tourism in Timaru although total visitor days dipped slightly

International visitors carried Timaru's month while the domestic side retreated. Total visitor days dipped (▼-2% YoY) but total visitor nights rose (▲+4% YoY), suggesting visitors who did come stayed increasingly overnight. The international segment jumped ▲+24% YoY in visitor days, placing Timaru third among South Island RTOs for international growth, while domestic visitor days fell ▼-8% YoY. The Waitangi Day long weekend produced no visible lift in Timaru's daily visitor numbers. Accommodation absorbed the international surge comfortably, with guest nights up ▲+15% YoY and occupancy reaching 73% (▲+13%pt. YoY), and tourism earnings grew strongly (▲+8% YoY) even as total visitor spending posted only a modest gain (▲+4% YoY).

### Surging international visitor days visitor nights and spend outshine softening domestic demand

The domestic and international segments told sharply contrasting stories this month. Domestic visitor days fell ▼-8% YoY and domestic visitor nights softened ▼-4% YoY, a gap that suggests a slight shift from day trips to overnight stays. Domestic spend also dipped (▼-4% YoY), reinforcing the weaker demand picture. The international segment moved in the opposite direction: visitor days jumped ▲+24% YoY and visitor nights rose even faster (▲+27% YoY), indicating that international visitors both arrived in greater numbers and increasingly favoured overnight stays over day trips. International spend surged (▲+37% YoY), the second strongest result among South Island RTOs, pointing toward significantly higher yield per international visitor.

## Commentary

### **International visitor days surge while domestic visitor days continue to soften**

A strong international rebound masked continued domestic softness, leaving total visitor days marginally lower (▼-2% YoY). International visitor days jumped ▲+24% YoY, the third strongest result among South Island RTOs behind Canterbury (▲+29% YoY) and Waitaki (▲+29% YoY). Domestic visitor days fell ▼-8% YoY, placing Timaru 12th of 16 South Island RTOs for domestic performance, broadly in line with peers such as Hurunui (▼-8% YoY) and Nelson Tasman (▼-7% YoY). The Waitangi Day long weekend did not produce a visible lift in Timaru's daily visitor count, with the domestic peak day falling on 7 February at a level consistent with regular weekend traffic.

### **Europe now biggest international source market. Diversification in domestic markets with top markets declining while smaller markets grew**

Timaru's two dominant domestic source markets both weakened while the smaller origins held up or grew, creating a pronounced tier divergence. Canterbury (37% share) and Otago (27% share) together account for nearly two thirds of domestic visitor days yet both contracted: Canterbury fell ▼-13% YoY and Otago ▼-16% YoY. However, Canterbury's quarterly ending figure was softer ▼-6% YoY, suggesting the February dip may partly reflect a timing shift. Otago's quarterly ending figure (▼-15% YoY) confirms a more sustained decline from that market. The medium tier origins (Auckland, Waikato, Wellington, Southland, Bay of Plenty) collectively grew. On the international side, Europe overtook China, Japan & Korea to become Timaru's largest source market (33% share), growing ▲+53% YoY. China, Japan & Korea (27% share) grew modestly (▲+4% YoY) but lost its leading position. Rest of Asia (▲+23% YoY), Australia (▲+32% YoY), and USA & Canada (▲+55% YoY) all expanded strongly, pointing toward broadly based international growth. Rest of World – the smallest source market – was the sole decliner (▼-26% YoY).

### **Domestic spend softened in February, likely due to shifts in travel timings this summer**

Domestic spend softened (▼-3% YoY), trailing both the national average (▲+8% YoY) and Timaru's own prior month result (▲+4% YoY). The quarterly figure was broadly flat (↔ 0% YoY), which suggests the February dip is partly a timing effect rather than a lasting shift in domestic spending appetite. Timaru ranked 11th of 16 South Island RTOs for domestic spend, a mid pack outcome consistent with the weaker domestic visitor day figures.

### **International spend growth nearly doubles the national average**

International spend surged (▲+37% YoY), nearly double the national average (▲+18% YoY) and the second strongest result among South Island RTOs. This builds on the prior month's already elevated growth (▲+27% YoY), and the quarterly figure (▲+39% YoY) confirms the trend is sustained rather than a single month outlier. The strength appears consistent with the broadly based international visitor day growth across multiple source markets and likely reflects both higher visitor volumes and greater per visitor spend.

### **Surge in guest arrivals drives incredible occupancy levels**

Timaru's accommodation sector had a notably strong month, driven by sharply higher arrivals into reduced capacity. Total guest nights jumped ▲+15% YoY, well above the national benchmark (▲+6% YoY), ranking Timaru third among South Island RTOs. The growth was driven by arrivals rather than longer stays: guest arrivals surged ▲+25% YoY while average length of stay shortened (▼-8% YoY), meaning more guests stayed briefly rather than fewer guests staying longer. International guest nights jumped ▲+29% YoY while domestic guest nights rose ▲+10% YoY, confirming the international segment as the primary driver. Occupancy reached 73% (▲+13%pt. YoY), boosted in part by a ▼-7% YoY reduction in available capacity.

### **Surging guest nights drive growth across holiday parks and apartments**

Holiday Parks & Campgrounds dominated Timaru's accommodation mix (52% of guest nights) and posted solid growth across both segments, with domestic guest nights up ▲+10% YoY and international guest nights up ▲+11% YoY at a similar rate. Occupancy reached 61% (▲+14%pt. YoY). Motels & Apartments (6-20) held 28% of guest nights and grew strongly overall (▲+22% YoY), with domestic guest nights rising ▲+6% YoY and international guest nights recording significant growth (▲+77% YoY). Occupancy at this property type reached 88% (▲+4%pt. YoY), the highest of any Timaru accommodation category, suggesting limited headroom for further growth without additional supply. Lodges (4% of guest nights) were the only property type to contract, with total guest nights falling ▼-11% YoY across both segments.

### **Workforce earnings and filled jobs climb as accommodation and guest night figures soar**

Timaru's tourism workforce expanded modestly in filled jobs (▲+2% YoY) but saw a strong lift in earnings (▲+8% YoY), both ahead of the national benchmarks (filled jobs ▲+1% YoY, earnings ▲+4% YoY). The earnings result placed Timaru fifth among South Island RTOs, suggesting rising value per job. Accommodation was the standout industry: filled jobs jumped ▲+18% YoY and earnings surged ▲+41% YoY, consistent with the strong guest night and occupancy figures. Food and Beverage Services (55% of filled jobs) grew steadily in both jobs (▲+3% YoY) and earnings (▲+9% YoY). Travel and Tour Services also expanded in jobs (▲+17% YoY) and earnings (▲+11% YoY), albeit from a smaller base. On the weaker side, Transport Services contracted in jobs (▼-21% YoY) while earnings held up (▲+4% YoY), a divergence that may reflect fewer but higher paid roles or a reclassification effect.

# Visitation Overview

Venture Timaru - February 2026

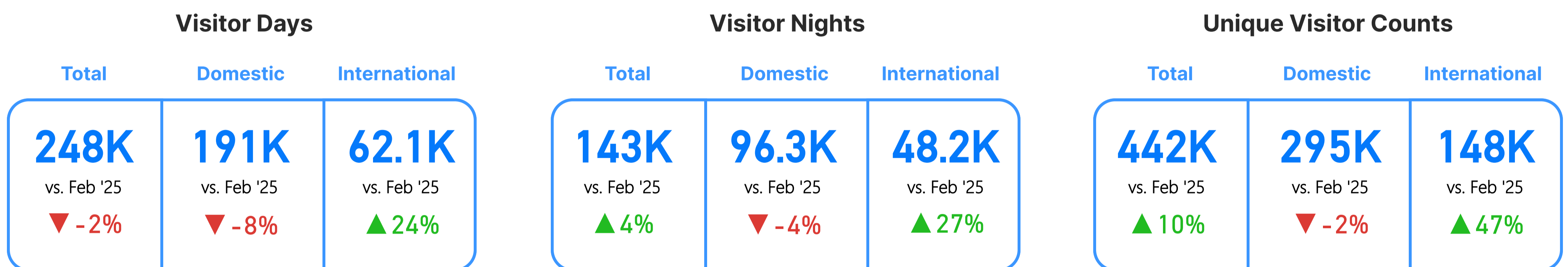
The Tourism Volumes & Flows series provides measures of visitor activity and movement across Aotearoa New Zealand, based on presence rather than activity. In other words a visitor does not need to spend money by card, or stay in commercial accommodation to be counted.



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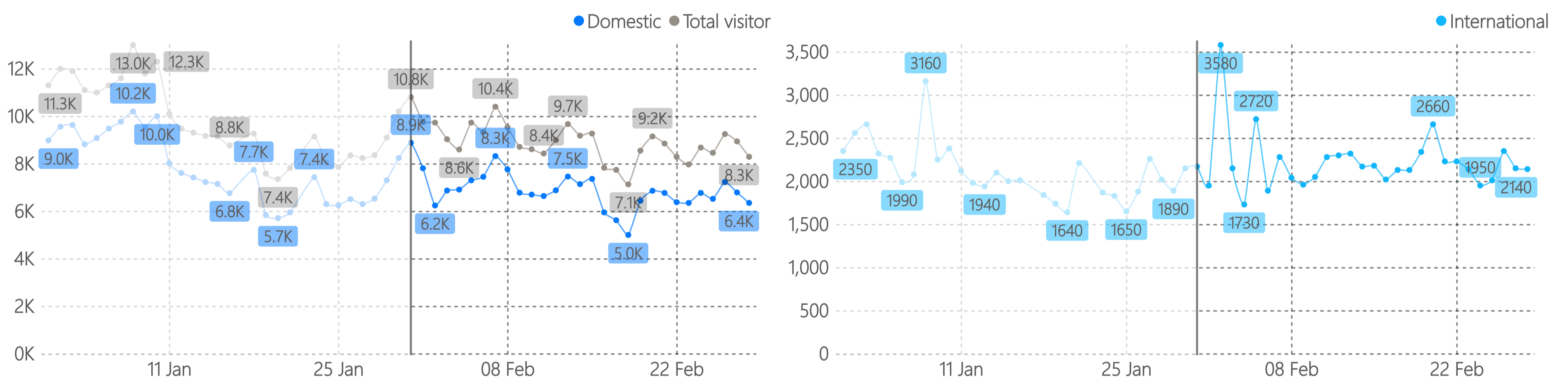


## Visitation

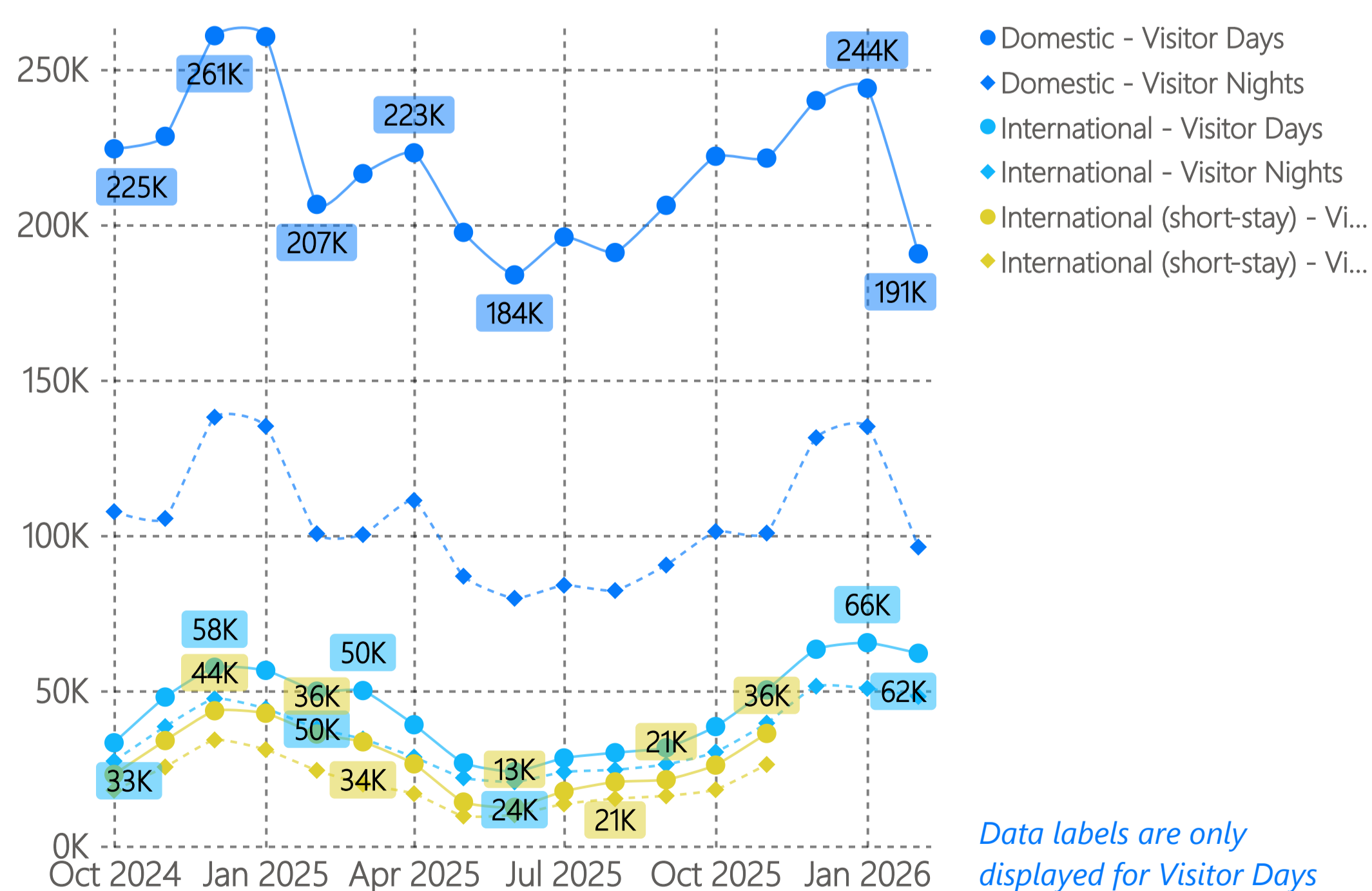


Note: Visitor days represent the cumulative sum of peak daytime visitor counts. To most accurately capture peak daily total visitor counts these are calculated separately from domestic and international, as peak times may vary between the domestic and international visitor populations.

## Peak Daytime Visitor Volume

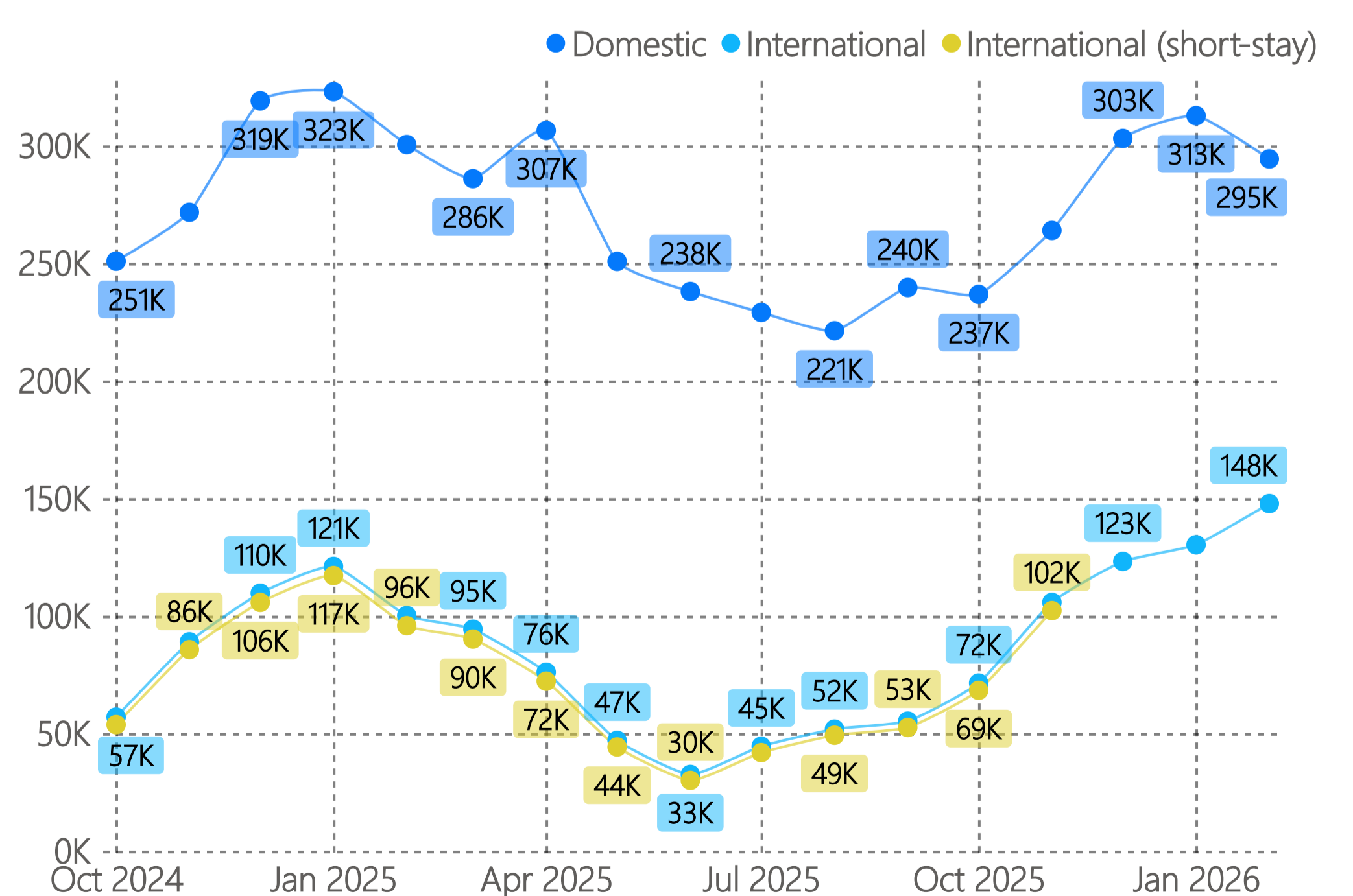


## Monthly Visitor Days & Visitor Nights



Data labels are only displayed for Visitor Days

## Monthly Unique Visitors



# Visitation Overview

Venture Timaru - February 2026

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## Visitation Benchmark Comparison

### Total Visitor

Measure	Unique Visitors			Visitor Days			Visitor Nights		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	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	814K	24.6%	▲9%	1.5M	39.9%	▲10%			
Marlborough	345K	10.5%	▼-5%	614K	16.0%	▼-5%	467K	28.1%	▲1%
West Coast	262K	7.9%	▲9%	441K	11.5%	▲10%	326K	19.6%	▲9%
Mackenzie	355K	10.7%	▲15%	350K	9.1%	▲1%	280K	16.9%	▼-1%
Waitaki	487K	14.7%	▲12%	295K	7.7%	▼-1%	165K	9.9%	▲2%
Timaru	442K	13.4%	▲10%	248K	6.5%	▼-2%	143K	8.6%	▲4%
Kaikoura	216K	6.5%	▲2%	230K	6.0%	▼-1%	205K	12.4%	▼-1%
Hurunui	382K	11.6%	▼-2%	125K	3.3%	▼-1%	76K	4.6%	▼-1%

### Domestic

Measure	Unique Visitors			Visitor Days			Visitor Nights		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	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	552K	26.1%	▲0%	754K	34.0%	▼-4%			
Marlborough	223K	10.6%	▼-12%	423K	19.1%	▼-8%	335K	32.9%	▼0%
Waitaki	298K	14.1%	▲1%	210K	9.5%	▼-9%	107K	10.5%	▼-7%
Timaru	295K	13.9%	▼-2%	191K	8.6%	▼-8%	96K	9.5%	▼-4%
West Coast	154K	7.3%	▼-1%	236K	10.6%	▲1%	173K	17.0%	▼-1%
Mackenzie	177K	8.4%	▲2%	169K	7.6%	▼-14%	118K	11.6%	▼-20%
Kaikoura	133K	6.3%	▼-8%	162K	7.3%	▼-9%	145K	14.3%	▼-9%
Hurunui	281K	13.3%	▼-9%	71K	3.2%	▼-8%	44K	4.4%	▼-4%

### International

Measure	Unique Visitors			Visitor Days			Visitor Nights		
	Visitor Latest Month	Relative Share of Market - Latest Month	YoY Latest Month	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	262K	22.0%	▲31%	786K	47.4%	▲29%			
Mackenzie	178K	14.9%	▲31%	190K	11.4%	▲20%	163K	24.9%	▲20%
West Coast	109K	9.1%	▲25%	211K	12.7%	▲22%	155K	23.6%	▲25%
Marlborough	122K	10.3%	▲12%	194K	11.7%	▲2%	135K	20.6%	▲7%
Waitaki	188K	15.8%	▲35%	88K	5.3%	▲29%	60K	9.1%	▲23%
Timaru	148K	12.4%	▲47%	62K	3.7%	▲24%	48K	7.4%	▲27%
Kaikoura	82K	6.9%	▲25%	74K	4.5%	▲23%	62K	9.4%	▲29%
Hurunui	101K	8.5%	▲25%	56K	3.4%	▲7%	32K	4.9%	▲4%

# Domestic Visitation

Venture Timaru - February 2026

The Tourism Volumes & Flows 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.



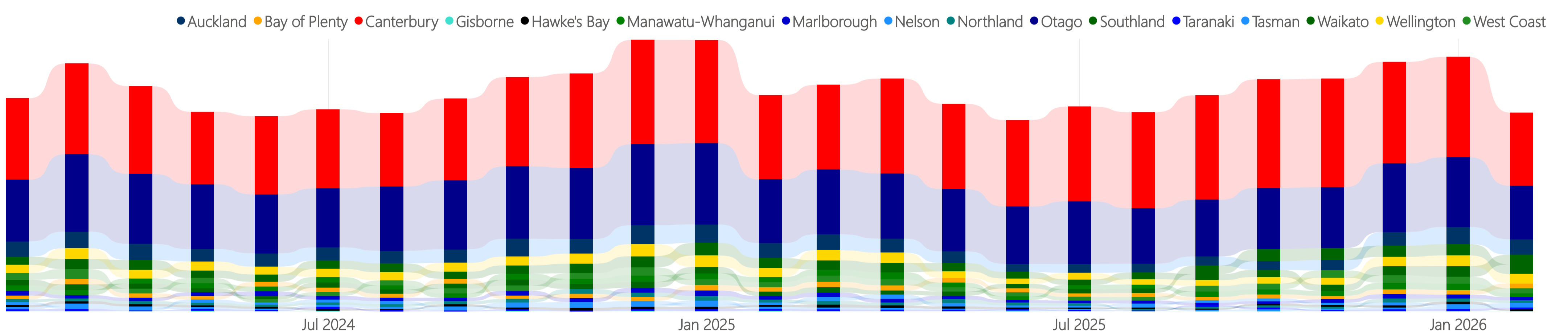
Timaru's two dominant domestic source markets both weakened while the smaller origins held up or grew, creating a pronounced tier divergence. Canterbury (37% share) and Otago (27% share) together account for nearly two thirds of domestic visitor days yet both contracted: Canterbury fell ▼-13% YoY and Otago ▼-16% YoY. However, Canterbury's quarterly ending figure was softer ▼-6% YoY, suggesting the February dip may partly reflect a timing shift.



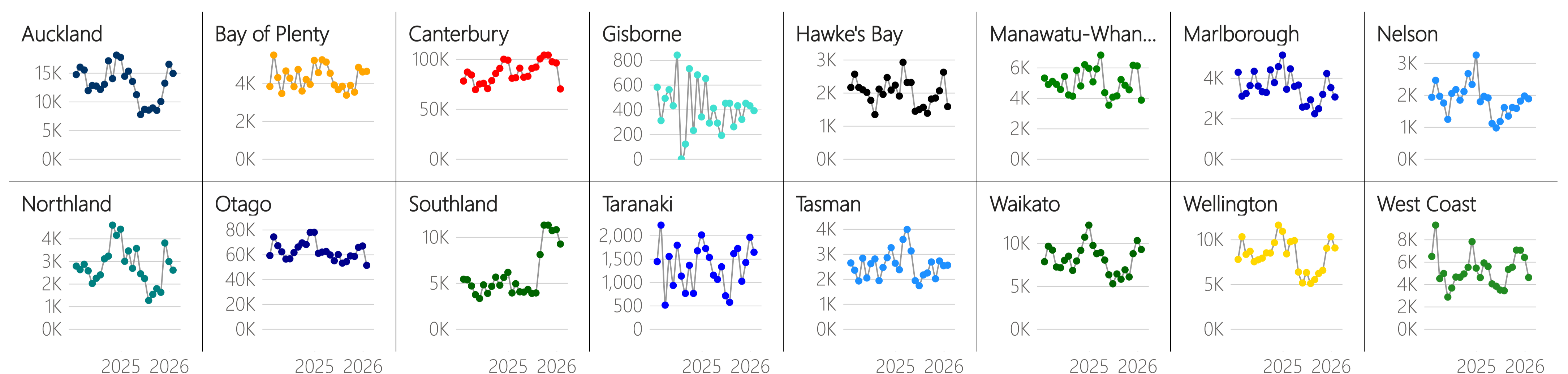
## Domestic Visitation — By Market

Visitor Origin by Regional Council	Domestic Visitor Days	Share of Domestic Visitor Days	YoY Domestic Visitor Days
Canterbury	70,100	36.8%	▼-13%
Otago	51,200	26.9%	▼-16%
Auckland	14,900	7.8%	▲3%
Waikato	9,260	4.9%	▼-5%
Southland	9,240	4.8%	▲136%
Wellington	9,050	4.7%	▲8%
Bay of Plenty	4,630	2.4%	▲2%
West Coast	4,600	2.4%	▲0%
Manawatu-Whanganui	3,860	2.0%	▼-24%
Marlborough	3,060	1.6%	▼-11%
Northland	2,600	1.4%	▼-13%
Tasman	2,550	1.3%	▲8%
Nelson	1,880	1.0%	▲5%
Taranaki	1,640	0.9%	▼-5%
Hawke's Bay	1,580	0.8%	▼-17%
Gisborne	390	0.2%	▼-40%

## Domestic Visitation — Ranked by Market



## Domestic Visitation Trends — By Market



# International Visitation

Venture Timaru - February 2026

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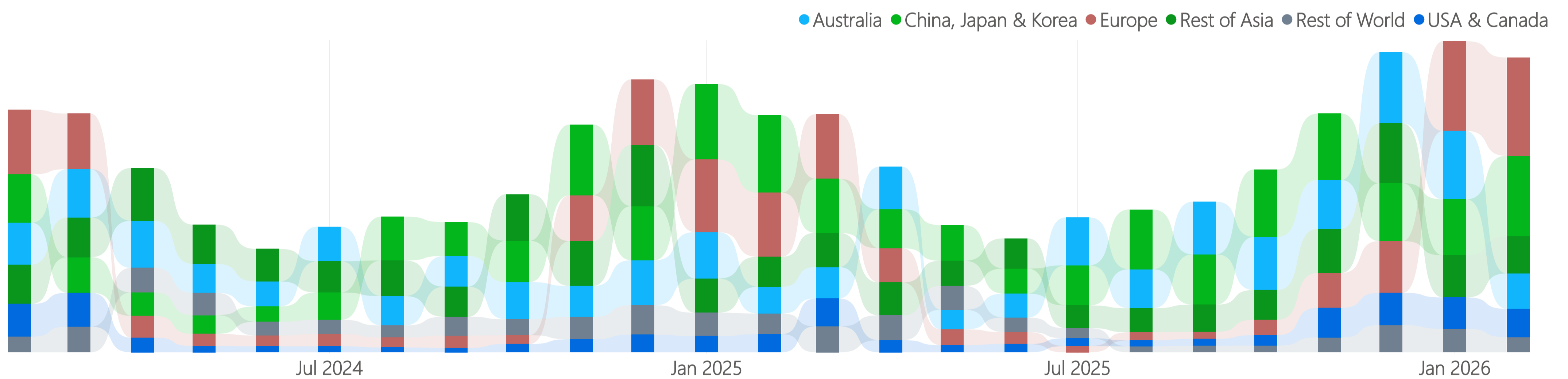
On the international side, Europe overtook China, Japan & Korea to become Timaru's largest source market (33% share), growing ▲+53% YoY. China, Japan & Korea (27% share) grew modestly (▲+4% YoY) but lost its leading position. Rest of Asia (▲+23% YoY), Australia (▲+32% YoY), and USA & Canada (▲+55% YoY) all expanded strongly, pointing toward broadly based international growth.



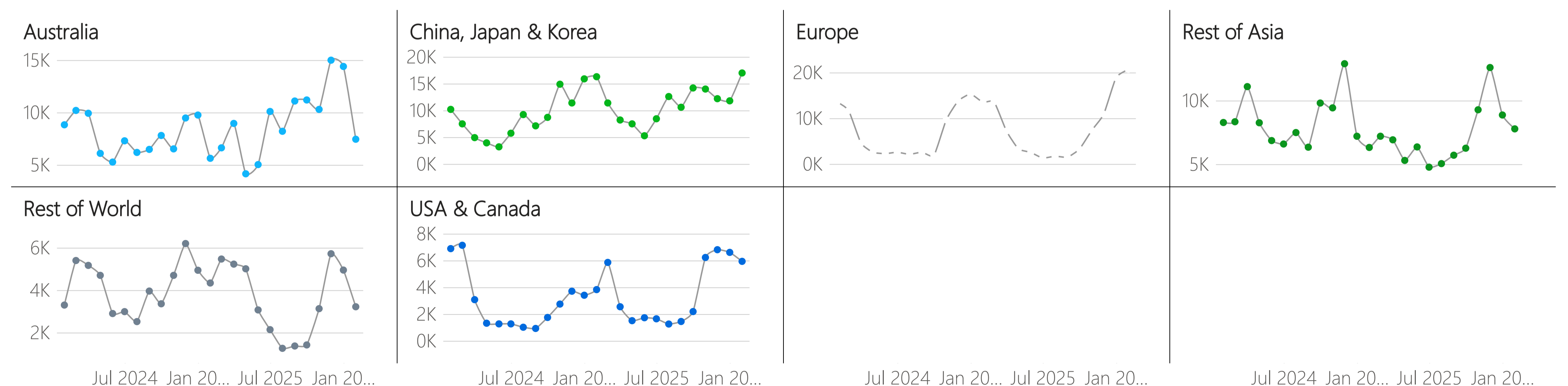
## International Visitation — By Market

Overseas markets	International total visitor days	Share of Total International Visitor Days	YoY Total International Visitor Days
Europe	20,700	33.3%	▲53%
China, Japan & Korea	17,000	27.4%	▲4%
Rest of Asia	7,780	12.5%	▲23%
Australia	7,450	12.0%	▲32%
USA & Canada	5,940	9.6%	▲55%
Rest of World	3,220	5.2%	▼26%

## International Visitation — Ranked by Market



## International Visitation Trends — By Market



# Visitor Spending Overview

Venture Timaru - February 2026

The Monthly Regional Tourism Estimates (MRTEs) are modelled estimates of total visitor spending. They combine electronic card transaction data from major payment networks with official statistics, including the Retail Trade Survey and Tourism Satellite Account, to produce monthly estimates of visitor expenditure by region, visitor type, and industry.



Domestic spend softened (▼-3% YoY), trailing both the national average (▲+8% YoY) and Timaru's own prior month result (▲+4% YoY). The quarterly figure was broadly flat (↔ 0% YoY), which suggests the February dip is partly a timing effect rather than a lasting shift in domestic spending appetite. Timaru ranked 11th of 16 South Island RTOs for domestic spend, a mid pack outcome consistent with the weaker domestic visitor day figures.



## Visitor Spend

### Monthly Visitor Spending

Total	Domestic	International
<b>38.8M\$</b>	<b>28.9M\$</b>	<b>9.9M\$</b>
vs. Feb '25	vs. Feb '25	vs. Feb '25
▲ 4%	▼ -3%	▲ 37%

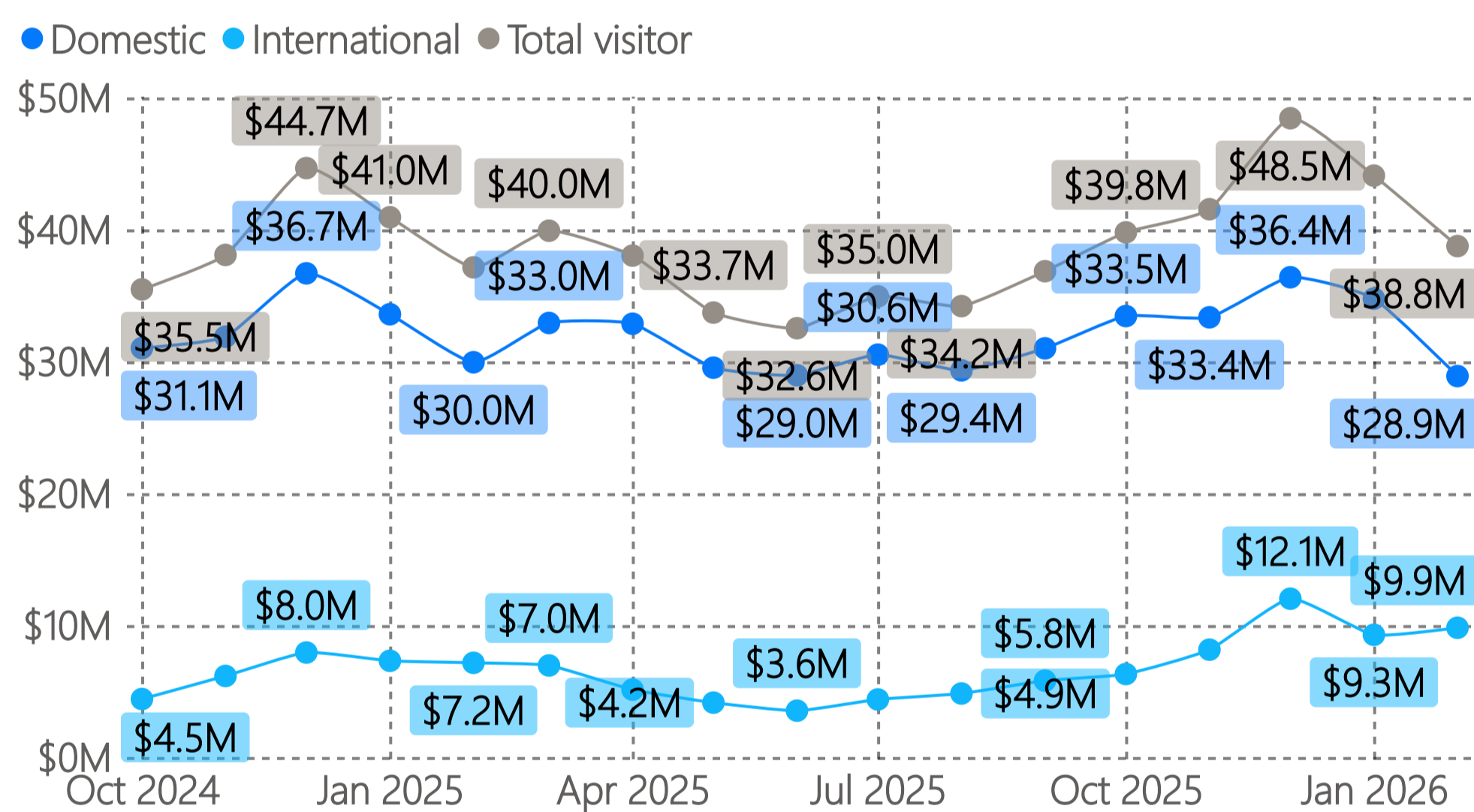
### Year-Ending Visitor Spending

Total	Domestic	International
<b>463M\$</b>	<b>382M\$</b>	<b>80.8M\$</b>
vs. Feb '25	vs. Feb '25	vs. Feb '25
▲ 11%	▲ 7%	▲ 33%

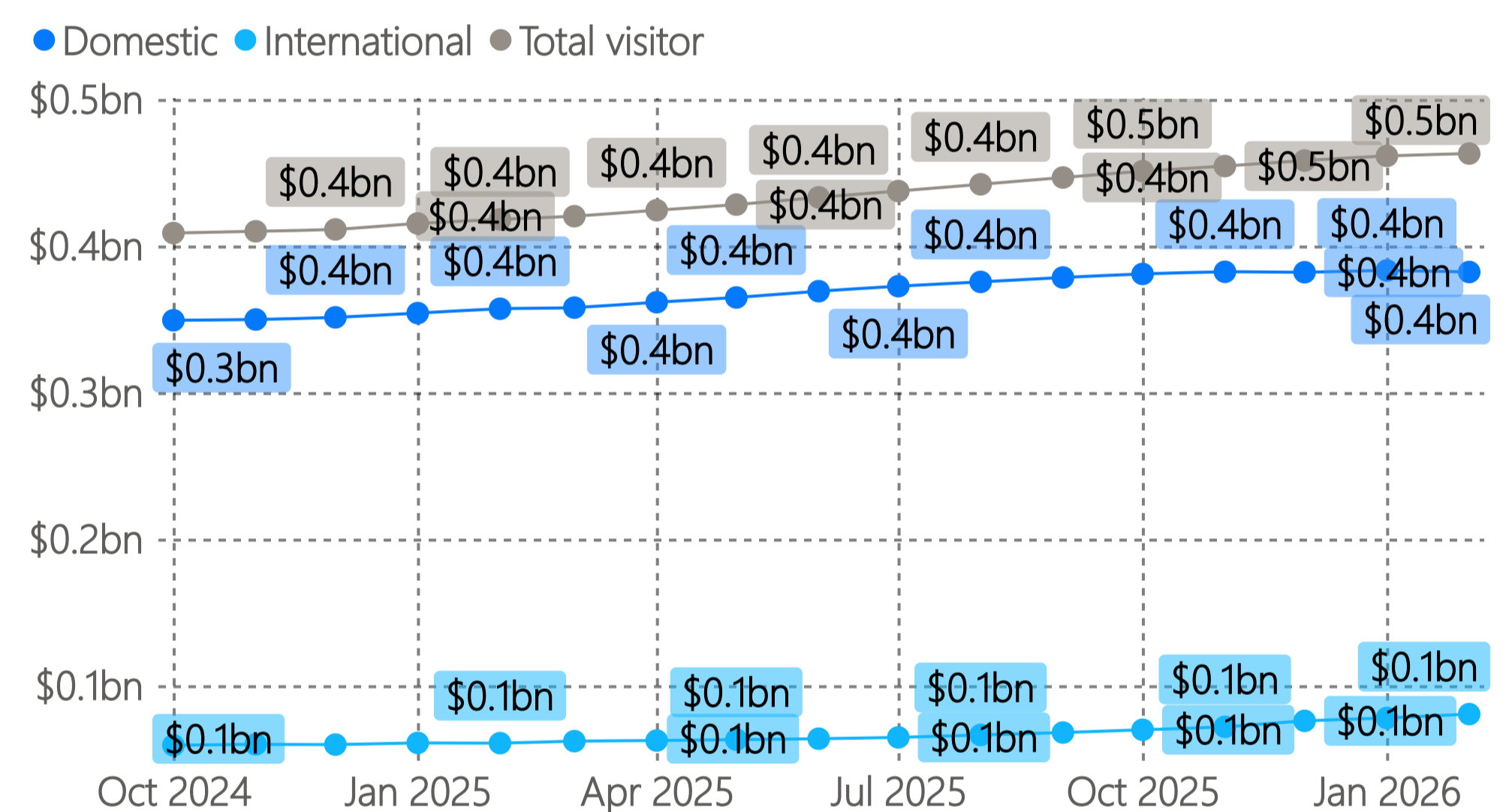


## Visitor Spend Trends

### Monthly Visitor Spending



### Year-Ending Visitor Spending



## Visitor Spend Benchmarks



### Domestic Benchmark

RTO	Monthly figure			Year-Ending figure		
	Visitor Spending	Relative Share of Market	YoY	Visitor Spending	Relative Share of Market	YoY
Canterbury	\$215M	55.4%	▲14%	\$2.3B	53.7%	▲2%
West Coast	\$49.8M	12.9%	▲9%	\$530M	12.2%	▲5%
Marlborough	\$39.3M	10.2%	▲3%	\$425M	9.8%	▲4%
Timaru	\$28.9M	7.5%	▼-3%	\$382M	8.8%	▲7%
Waitaki	\$18.6M	4.8%	▼-1%	\$236M	5.4%	▲5%
Mackenzie	\$14.0M	3.6%	▼-16%	\$176M	4.1%	▼-2%
Hurunui	\$13.3M	3.4%	▼-2%	\$159M	3.7%	▲3%
Kaikoura	\$8.6M	2.2%	▼-7%	\$101M	2.3%	▲8%



### International Benchmark

RTO	Monthly figure			Year-Ending figure		
	Visitor Spending	Relative Share of Market	YoY	Visitor Spending	Relative Share of Market	YoY
Canterbury	\$211M	57.3%	▲11%	\$1.9B	64.1%	▲21%
West Coast	\$63.9M	17.4%	▲17%	\$367M	12.5%	▲9%
Mackenzie	\$35.4M	9.6%	▲17%	\$256M	8.7%	▲8%
Marlborough	\$25.9M	7.0%	▼-17%	\$205M	7.0%	▲10%
Timaru	\$9.9M	2.7%	▲37%	\$80.8M	2.8%	▲33%
Kaikoura	\$10.0M	2.7%	▲15%	\$62.8M	2.1%	▲16%
Waitaki	\$8.4M	2.3%	▲33%	\$59.5M	2.0%	▲11%
Hurunui	\$3.5M	1.0%	▲12%	\$24.3M	0.8%	▲4%

# Accommodation Overview

Venture Timaru - February 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.



Timaru's accommodation sector had a notably strong month, driven by sharply higher arrivals into reduced capacity. Total guest nights jumped ▲+15% YoY, well above the national benchmark (▲+6% YoY), ranking Timaru third among South Island RTOs. The growth was driven by arrivals rather than longer stays: guest arrivals surged ▲+25% YoY while average length of stay shortened (▼-8% YoY), meaning more guests stayed briefly rather than fewer guests staying longer.



## Commercial Accommodation

Occupancy

**73%**

vs. Feb '25

↑ 13%pt.

Guest Nights

**43.7K**

vs. Feb '25

▲ 15%

Available Stay Units

**30.3K**

vs. Feb '25

▼ -7%

Average Stay Length

**1.6**

vs. Feb '25

▼ -8%

Guest Arrivals

**27.5K**

vs. Feb '25

▲ 25%

## Short-term Rental Accommodation

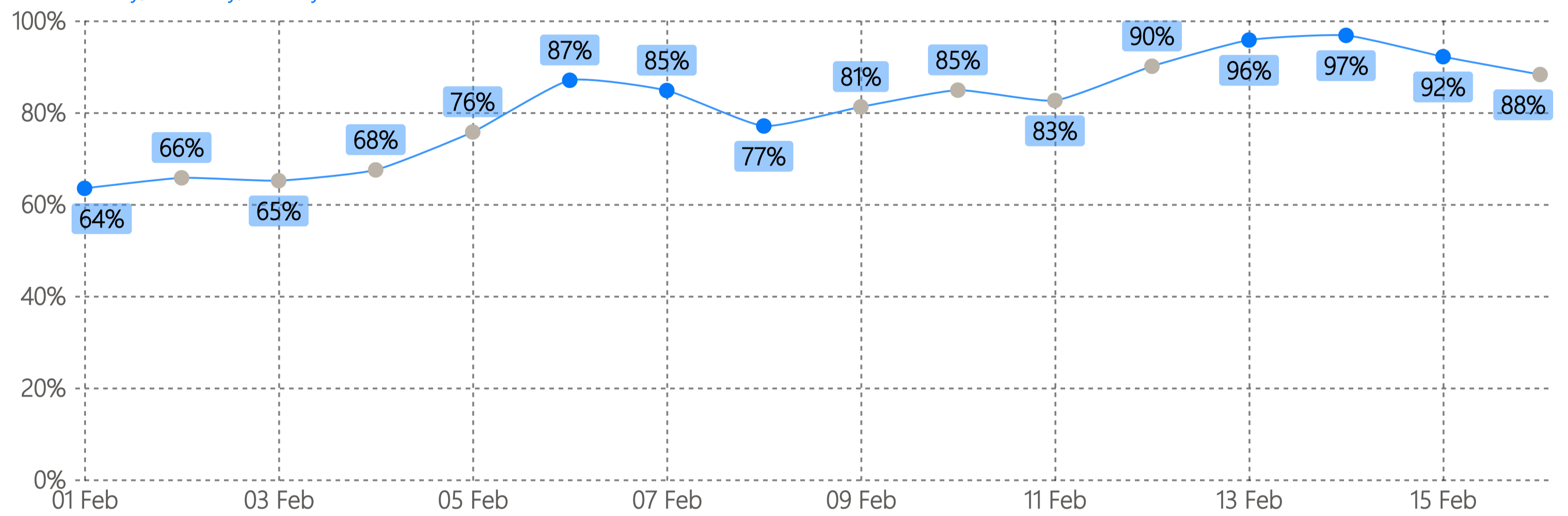
Occupancy

**81%**

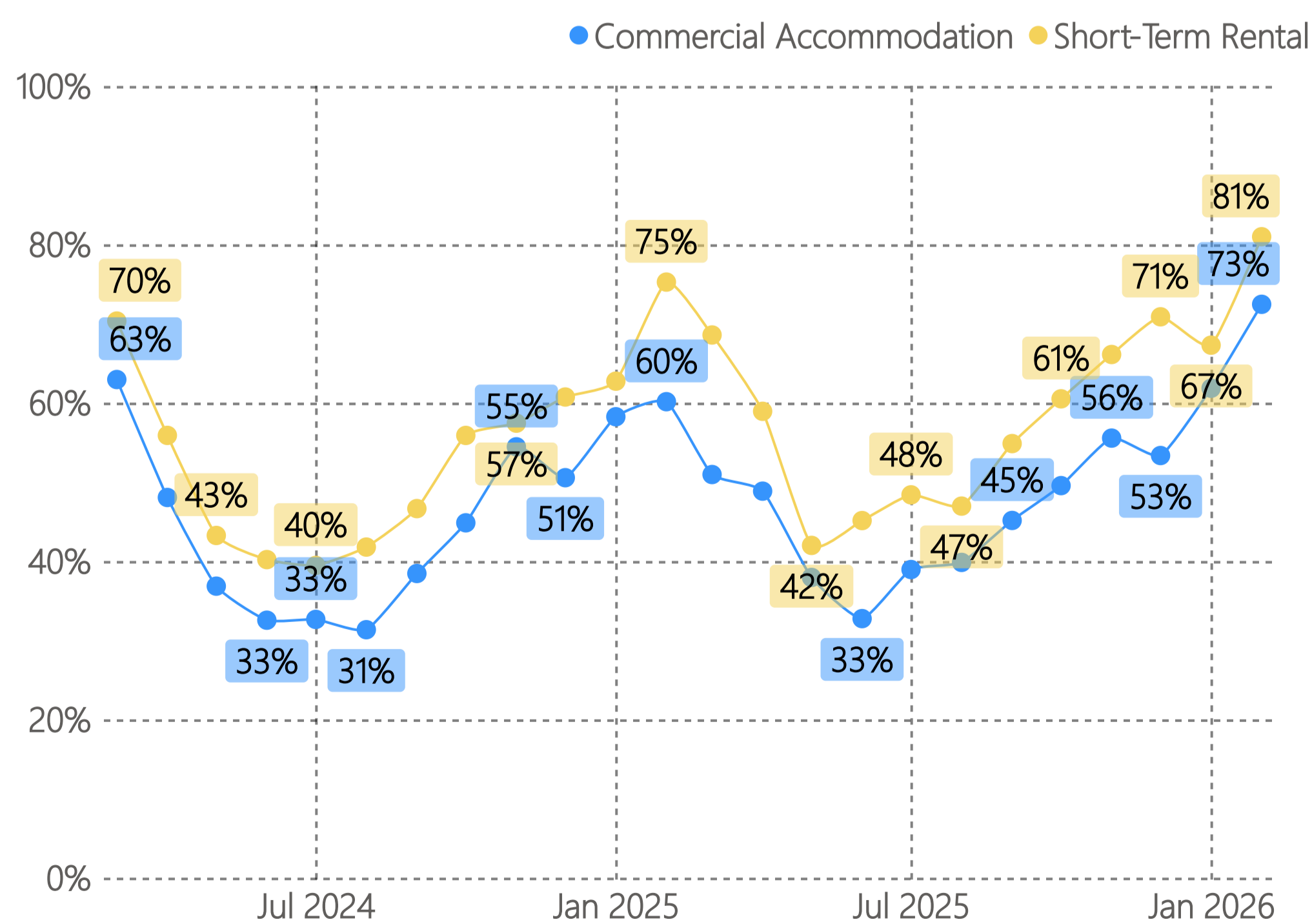
vs. Feb '25

↑ 6%pt.

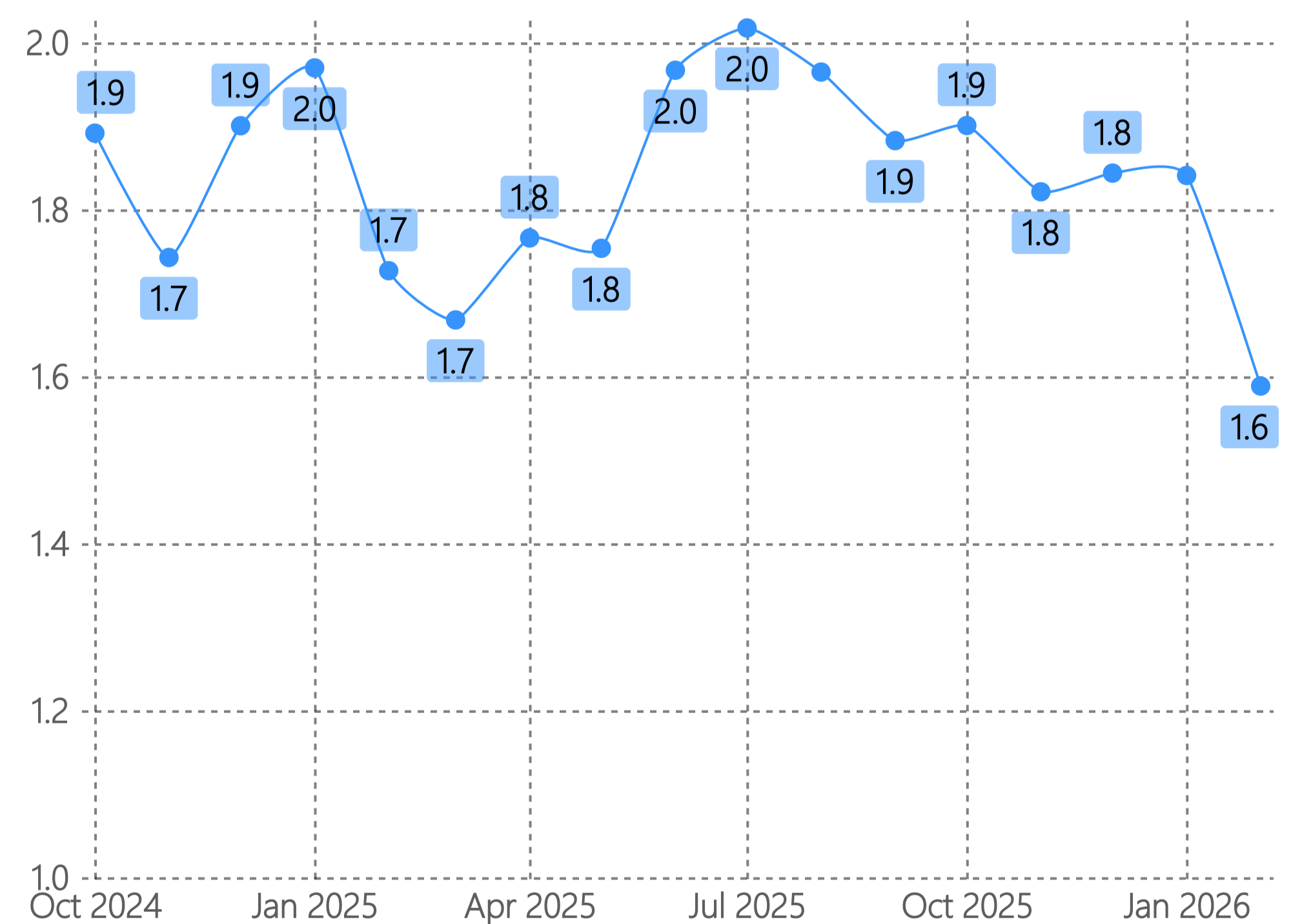
Blue = Friday, Saturday, Sunday



## Occupancy



## Average Stay Length in Commercial Accommodation



# Accommodation Overview

Venture Timaru - February 2026

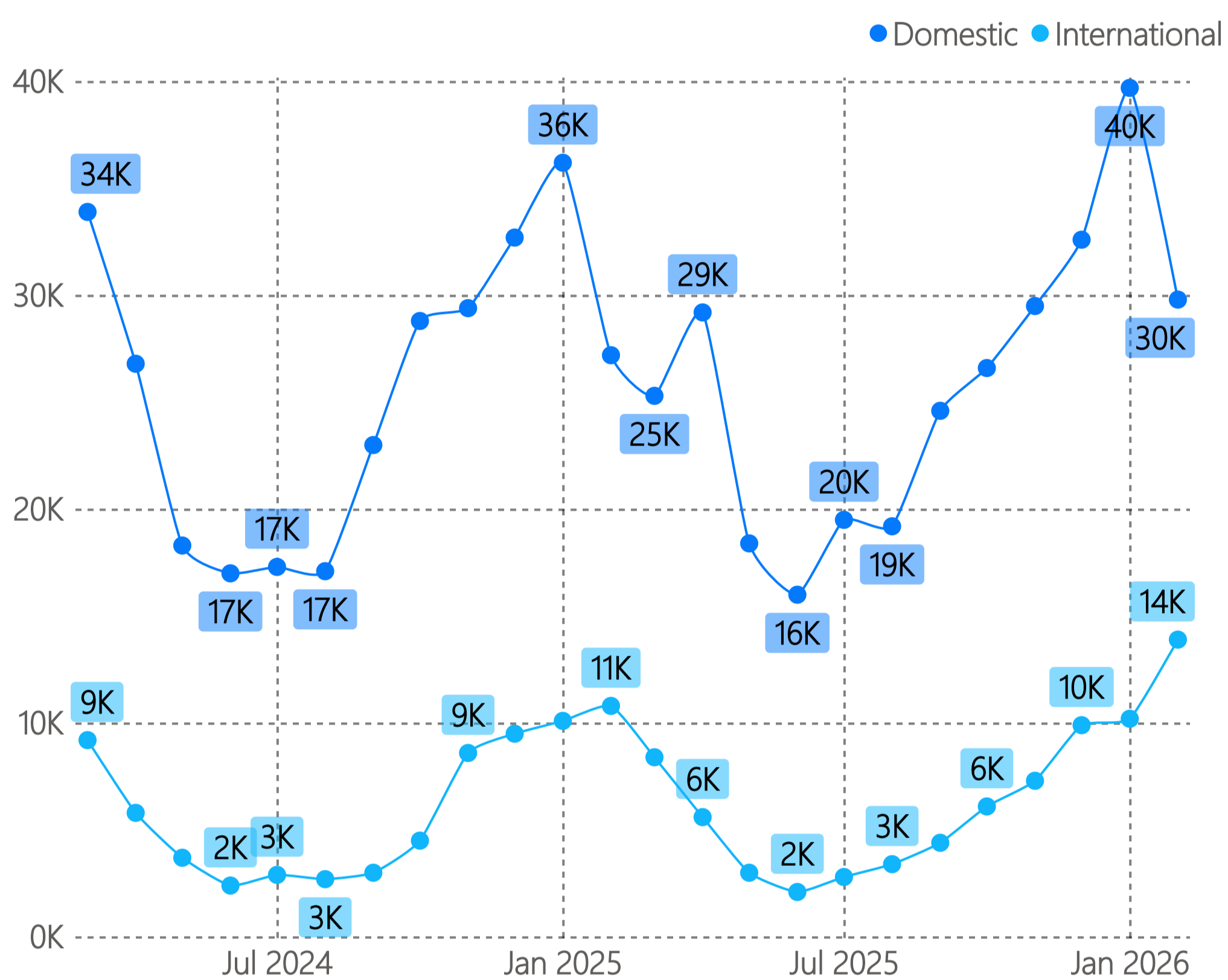
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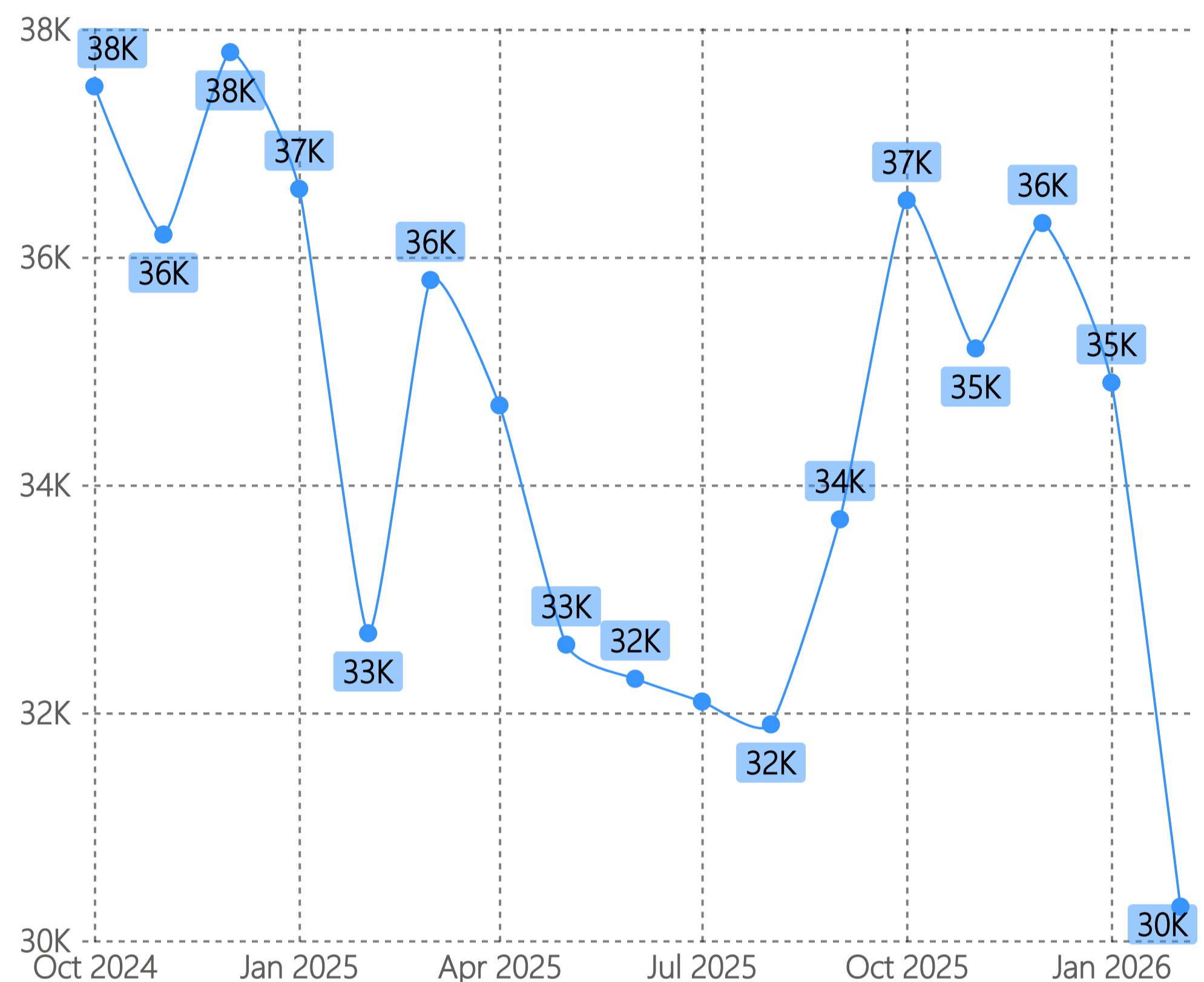
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## Guest Nights in Commercial Accommodation



## Available Monthly Stay Unit Capacity



## Commercial Accommodation Benchmark Comparison



### Domestic Benchmark

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	212K	44.2%	▼-4%	2.4M	46.9%	▼-1%	
West Coast	64K	13.3%	▲0%	581K	11.5%	▼-7%	
Marlborough	46K	9.5%	▼-4%	469K	9.3%	▼-3%	
Mackenzie	38K	7.9%	▲3%	394K	7.8%	▼-1%	
Waitaki	35K	7.3%	▲17%	330K	6.5%	▲2%	
Timaru	30K	6.2%	▲10%	310K	6.1%	▲1%	
Kaikoura	30K	6.2%	▼-13%	317K	6.3%	▲1%	
Hurunui	26K	5.4%	▲3%	284K	5.6%	▼-4%	



### International Benchmark

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	206K	43.1%	▲23%	1.5M	45.2%	▲12%	
West Coast	113K	23.6%	▲15%	729K	21.4%	▲9%	
Mackenzie	49K	10.2%	▲11%	414K	12.2%	▲9%	
Kaikoura	33K	6.9%	▲13%	207K	6.1%	▲8%	
Marlborough	31K	6.4%	▲8%	190K	5.6%	▲1%	
Waitaki	23K	4.9%	▲21%	179K	5.3%	▲18%	
Timaru	14K	2.9%	▲29%	77K	2.3%	▲5%	
Hurunui	9K	1.9%	▼-8%	69K	2.0%	▼-4%	

# Accommodation by Type

Venture Timaru - February 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.



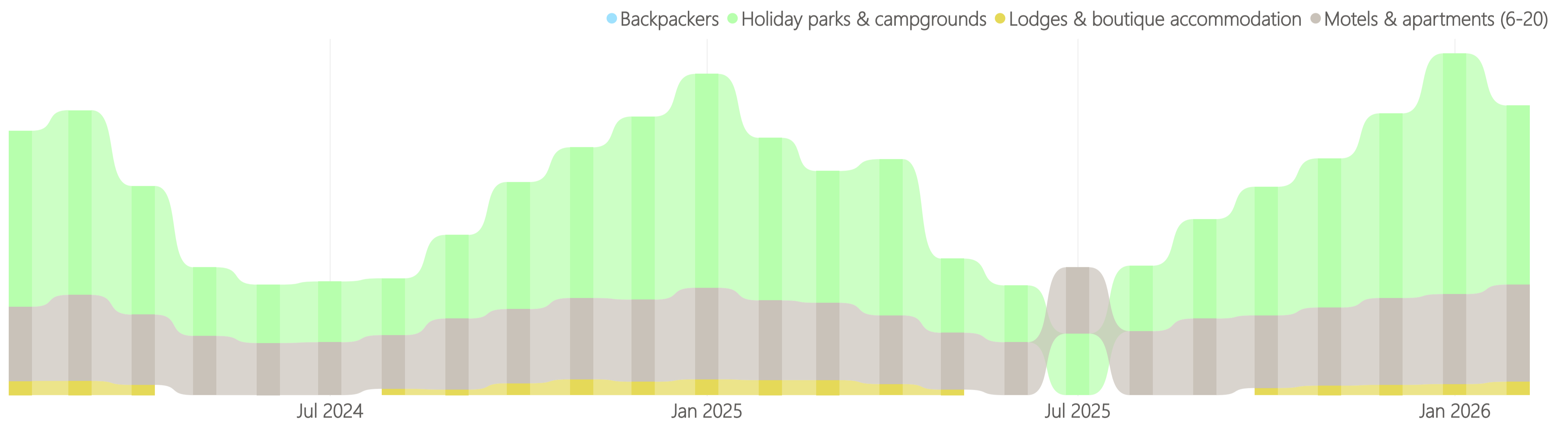
Holiday Parks & Campgrounds dominated Timaru's accommodation mix (52% of guest nights) and posted solid growth across both segments, with domestic guest nights up ▲+10% YoY and international guest nights up ▲+11% YoY at a similar rate. Occupancy reached 61% (▲+14%pt. YoY).



## 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	15,500	65.1%	▲21%	22,800	62.0%	▲11%	1.5	▼-9%	16,600	▼-15%	0.61	▲14%pt.
Motels & apartments (6-20)	7,200	30.3%	▲41%	12,300	33.4%	▲22%	1.7	▼-14%	7,400	▲9%	0.88	▲4%pt.
Lodges & boutique accommodation	1,100	4.6%	▲0%	1,700	4.6%	▼-11%	1.5	▼-11%	1,200	▼-25%	0.78	▲16%pt.
Backpackers	0	0.0%	-	0	0.0%	-	-	-	0	-	-	-
Hotels	-	-	-	-	-	-	-	-	-	-	-	-
Motels & apartments (>20)	-	-	-	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>27,500</b>		<b>▲25%</b>	<b>43,700</b>		<b>▲15%</b>	<b>1.6</b>	<b>▼-8%</b>	<b>30,300</b>	<b>▼-7%</b>	<b>0.73</b>	<b>▲13%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	16,000	63.7%	▲10%	6,800	58.1%	▲11%	22,800	62.0%	▲11%
Motels & apartments (6-20)	8,400	33.5%	▲6%	3,900	33.3%	▲77%	12,300	33.4%	▲22%
Lodges & boutique accommodation	700	2.8%	▼-13%	1,000	8.5%	▼-9%	1,700	4.6%	▼-11%
Backpackers	0	0.0%	-	0	0.0%	-	0	0.0%	-
Hotels	-	-	-	-	-	-	-	-	-
Motels & apartments (>20)	-	-	-	-	-	-	-	-	-
<b>Total</b>	<b>29,800</b>		<b>▲10%</b>	<b>13,900</b>		<b>▲29%</b>	<b>43,700</b>		<b>▲15%</b>

# Accommodation by Type

Venture Timaru - February 2026

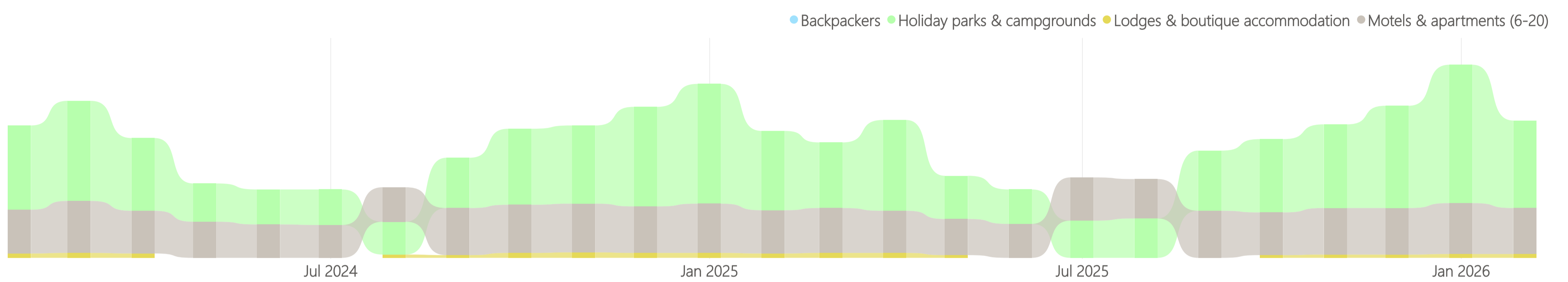
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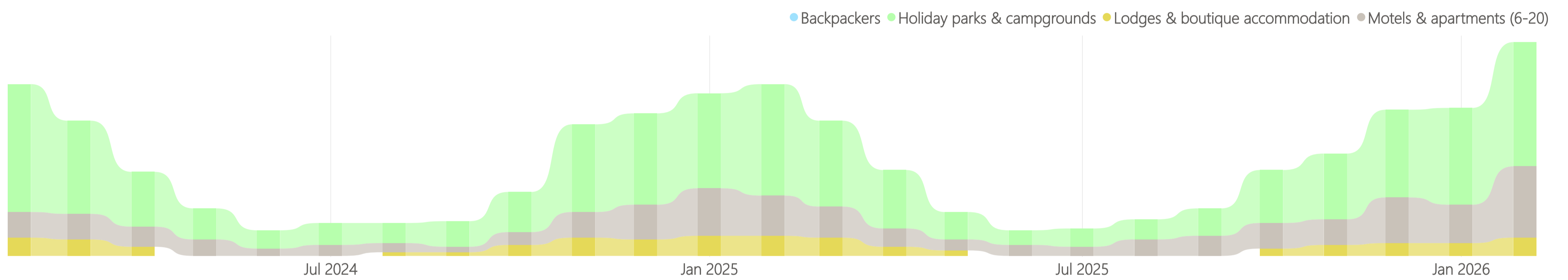
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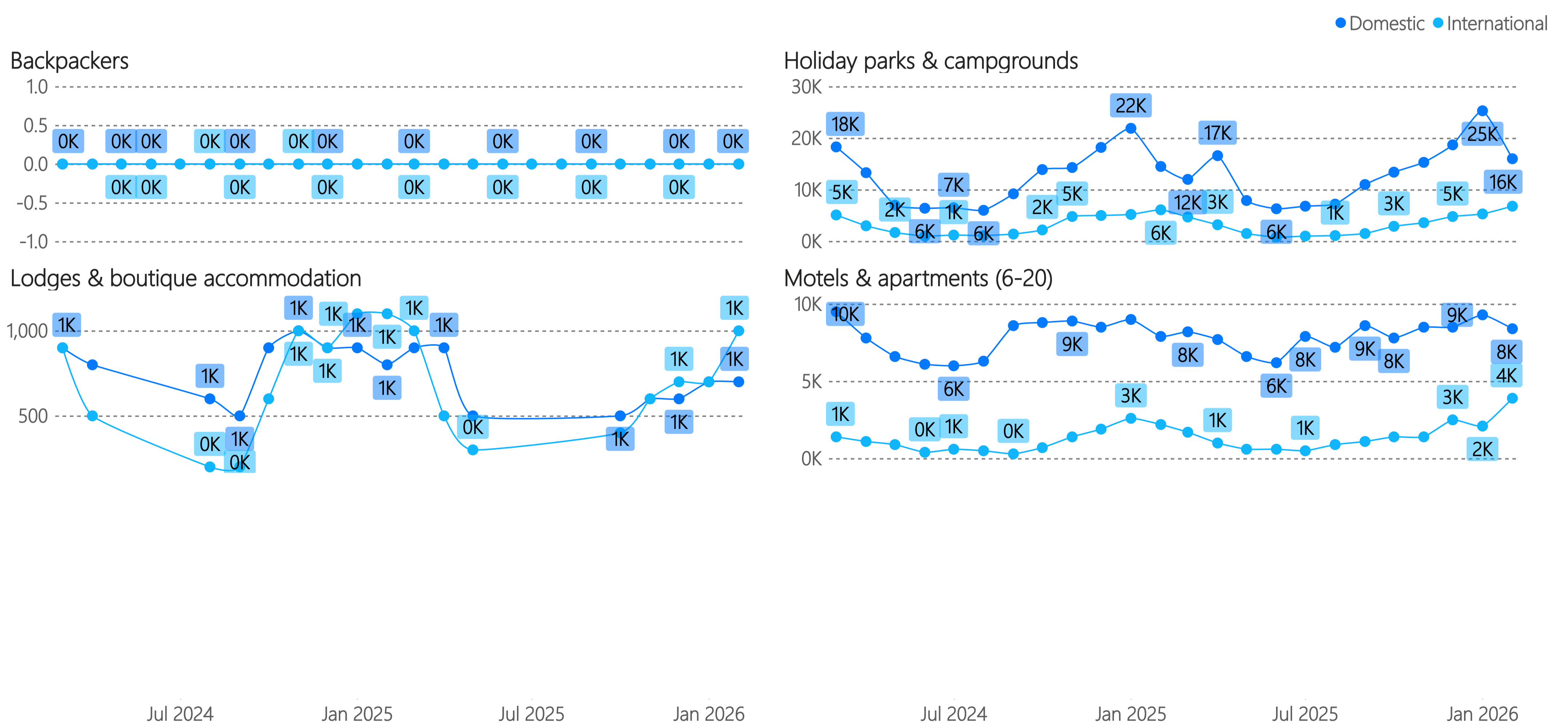
## Domestic Guest Nights — Ranked by Accommodation Type



## International Guest Nights — Ranked by Accommodation Type



## Guest Nights — Trends by Market



# Employment Overview

## Economic Indicator Data by Industry for February 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.



Timaru's tourism workforce expanded modestly in filled jobs (▲+2% YoY) but saw a strong lift in earnings (▲+8% YoY), both ahead of the national benchmarks (filled jobs ▲+1% YoY, earnings ▲+4% YoY). The earnings result placed Timaru fifth among South Island RTOs, suggesting rising value per job. Accommodation was the standout industry: filled jobs jumped ▲+18% YoY and earnings surged ▲+41% YoY, consistent with the strong guest night and occupancy figures.

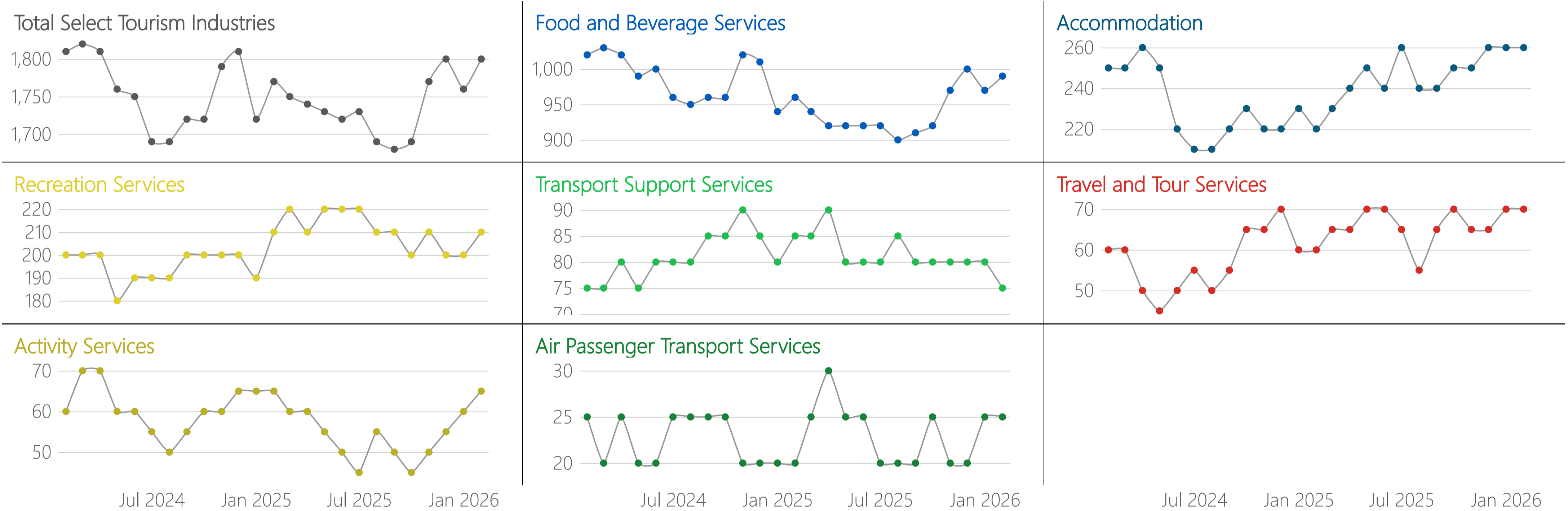


### Month at a Glance

Industry	Filled Jobs	Share of Filled Jobs	YoY Filled Jobs	Employment Earnings	Share of Employment Earnings	YoY Employment Earnings
Total Select Tourism Industries	1,800		▲2%	\$6.274M		▲8%
Food and Beverage Services	990	54.8%	▲3%	\$2.975M	47.4%	▲9%
Accommodation	260	14.4%	▲18%	\$0.782M	12.5%	▲41%
Recreation Services	210	11.6%	▲0%	\$0.734M	11.7%	▲4%
Transport Services	110	6.1%	▼-21%	\$0.44M	7.0%	▲4%
Transport Support Services	75	4.2%	▼-12%	\$0.459M	7.3%	▼-13%
Travel and Tour Services	70	3.9%	▲17%	\$0.36M	5.7%	▲11%
Activity Services	65	3.6%	▲0%	\$0.312M	5.0%	▼-3%
Air Passenger Transport Services	25	1.4%	▲25%	\$0.212M	3.4%	▼0%
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	28,830	73.4%	▲2%		74.2%	▲2%
Marlborough	3,270	8.3%	▲4%		8.0%	▲1%
West Coast	2,280	5.8%	▲1%		5.6%	▲0%
Timaru	1,800	4.6%	▲2%		4.6%	▼-1%
Waitaki	1,110	2.8%	▲12%		2.6%	▲6%
Hurunui	880	2.2%	▲5%		2.1%	▼0%
Mackenzie	720	1.8%	▲3%		1.8%	▼-2%
Kaikoura	410	1.0%	▲2%		1.0%	▲2%



### 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	\$127M	75.8%	▲3%	\$1.6B	77.1%	▲3%
Marlborough	\$12.4M	7.4%	▲6%	\$146M	7.1%	▼-4%
West Coast	\$9.1M	5.4%	▲3%	\$104M	5.1%	▲3%
Timaru	\$6.3M	3.8%	▲8%	\$76.0M	3.7%	▲6%
Waitaki	\$3.9M	2.3%	▲17%	\$41.8M	2.0%	▲8%
Hurunui	\$3.6M	2.1%	▲5%	\$42.5M	2.1%	▲3%
Mackenzie	\$3.5M	2.1%	▲6%	\$40.5M	2.0%	▲3%
Kaikoura	\$1.7M	1.0%	▲0%	\$19.0M	0.9%	▲2%

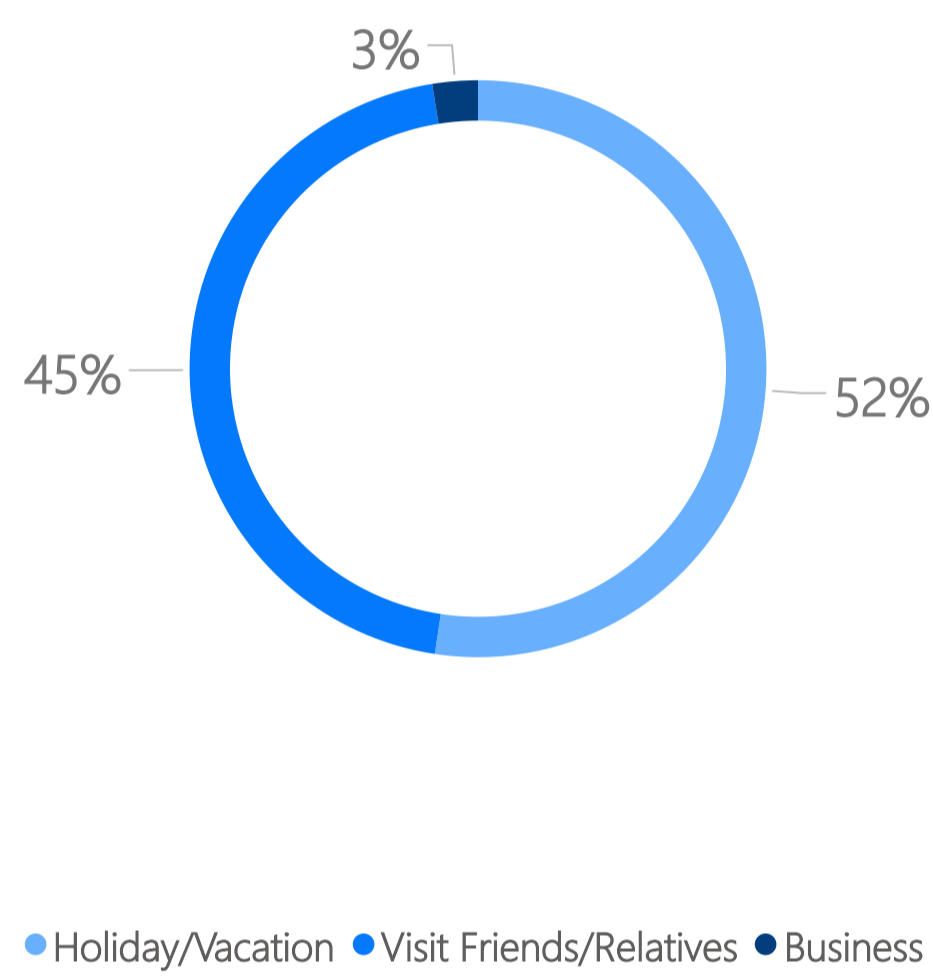
# Visitor Arrivals

Venture Timaru - February 2026

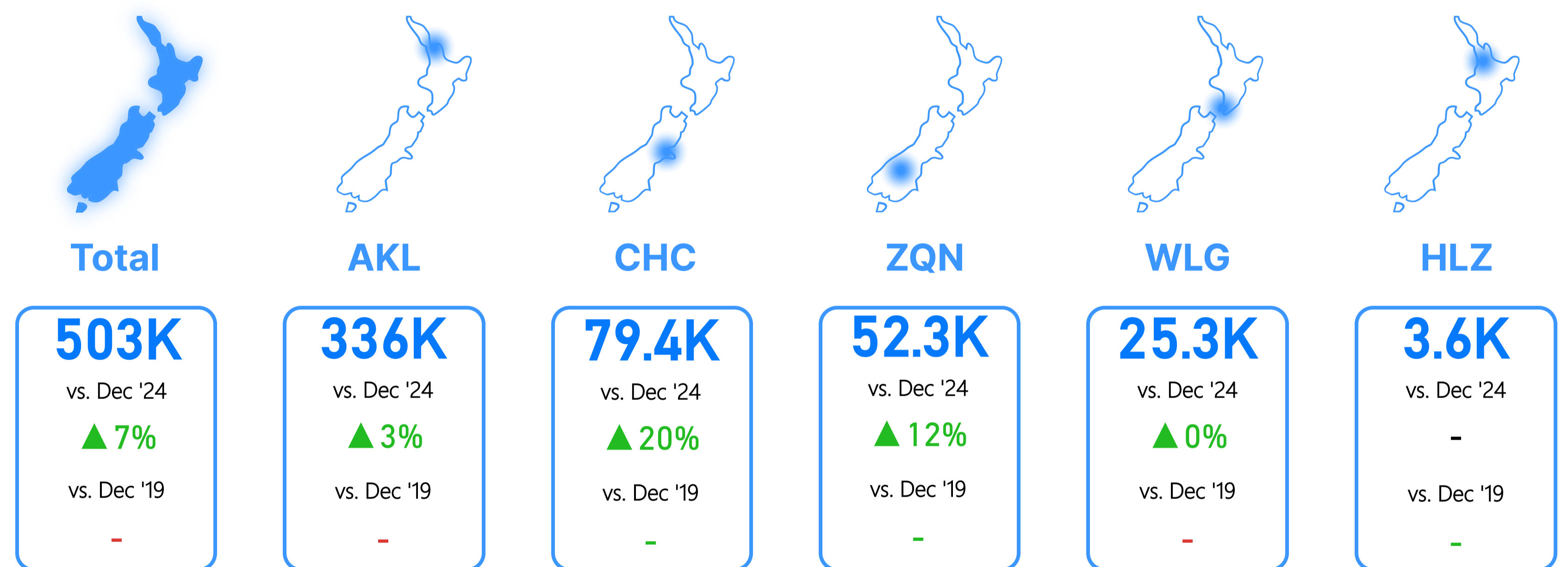
Visitor Arrivals data tracks individuals entering New Zealand who reside overseas and plan to stay for under a year. This includes those coming for temporary work or short-term education. Cruise ship passengers, typically classified as in-transit, are usually excluded from these statistics.

## Month at a Glance

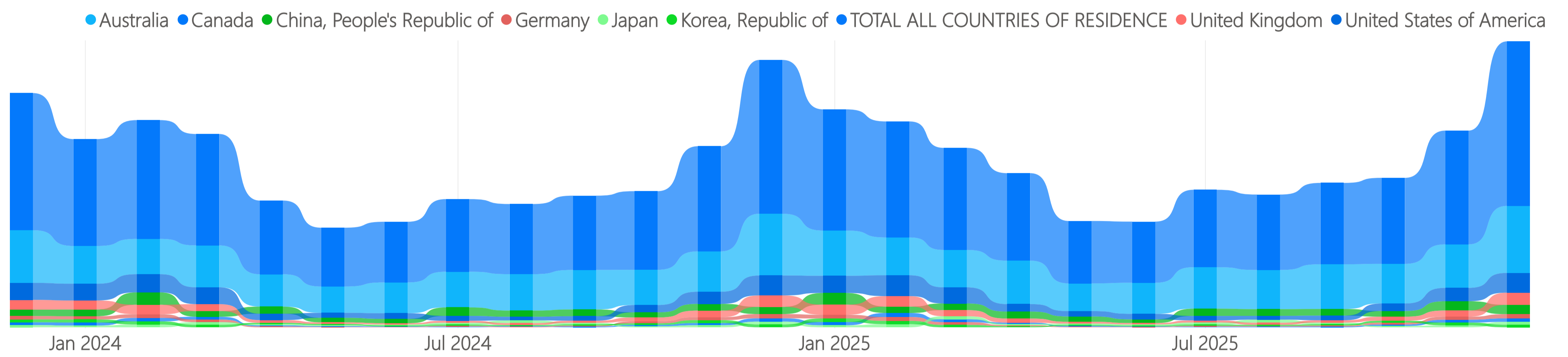
### Arrivals by Travel Purpose



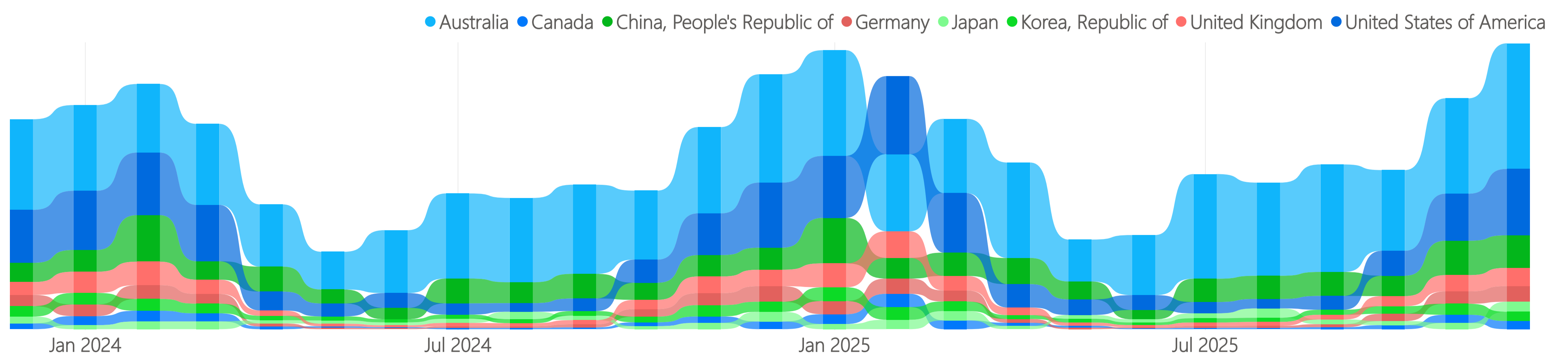
### International Visitor Arrivals by Port



## Visitor Arrivals by International Market



## Vacation Traveller Arrivals by International Market



## 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).