

Performance Indicators

Visitation / Visitor Days		Visitor Spending		Accommodation Occupancy		Tourism-related Employment	
198K	63K	37.1M\$	8.9M\$	65%	Short-term rental data is unfortunately not available for March 2026 due to a significant data outage	1.8K	6.8M\$
vs. Mar '25 ▼ -9%	vs. Mar '25 ▲ 26%	vs. Mar '25 ▲ 13%	vs. Mar '25 ▲ 27%	vs. Mar '25 ▲ 14%pt.		vs. Mar '25 ▲ 1%	vs. Mar '25 ▲ 14%
All NZ ▼ -10...	All NZ ▲ 19%	All NZ ▲ 4%	All NZ ▲ 22%	All NZ ▲ 2%pt.		All NZ ▲ 1%	All NZ ▲ 8%

Month at a Glance

- Commercial accommodation: ▲ Timaru ranked 1st in the South Island for guest night growth (▲ +16% YoY) and occupancy (65%), with supply contraction (▼ -8% YoY capacity) amplifying the demand uplift.
- Visitor yield: ▲ Spending jumped (▲ +15% YoY) despite fewer visitor days (▼ -3% YoY), suggesting a material lift in average spend per visitor mainly carried by the domestic segment.
- International surge: ▲ International visitor days jumped (▲ +26% YoY), led by China, Japan & Korea overtaking Europe as the largest international source market (30% share).
- Domestic softness: ▼ Domestic visitor days fell (▼ -9% YoY), with both top domestic source markets (Canterbury and Otago, combined 64% share) contracting structurally.
- Tourism-related employment reshuffle: Filled jobs grew strongly in hospitality while declining sharply in transport-related industries.

Commentary

Fewer visitors generate materially stronger spending in a textbook yield story

March told a story of fewer visitors but materially stronger yield for Timaru's visitor sector. Total visitor days dipped (▼ -3% YoY) yet visitor spending jumped (▲ +15% YoY), pointing to a substantial lift in average spend per visitor. Visitor nights held essentially flat (▲ +1% YoY) against the visitor day decline, suggesting the overnight share edged up, and guest nights jumped (▲ +16% YoY), indicating a meaningful shift toward commercial accommodation. Tourism-related employment held steady (▲ +1% YoY filled jobs). The picture is one of a smaller but higher yielding visitor base, with accommodation and spend metrics decisively outperforming the volume story.

Domestic visitors increasingly choose commercial accommodation despite lower overall numbers

The domestic and international segments diverged sharply this month. Domestic visitor days fell (▼ -9% YoY) while international visitor days jumped (▲ +26% YoY), making the international segment the clear growth engine despite Timaru's predominantly domestic visitor base. In the domestic segment, visitor days and visitor nights declined at a similar rate (▼ -9% YoY each), suggesting no change in the daytrip versus overnight mix; however, domestic guest nights jumped (▲ +16% YoY), indicating domestic overnights increasingly chose commercial accommodation. Domestic visitor spending also rebounded strongly (▲ +13% YoY), well ahead of the visitor day contraction, implying higher average spend per domestic visitor. The international segment showed even stronger overnight engagement: international visitor nights surged (▲ +36% YoY), outpacing visitor days (▲ +26% YoY), suggesting international visitors increasingly stayed overnight. International spending jumped (▲ +27% YoY), broadly tracking the visitor day growth.

Commentary

One of only two peers to post a visitor decline amid soft domestic demand

Timaru was one of only two South Island RTOs to record a total visitor day decline this month, ranking 15th of 16, with soft domestic demand masking a strong international rebound. Domestic visitor days fell (▼-9% YoY), placing the region second to last among South Island peers, while international visitor days jumped (▲+26% YoY). Total visitor nights held essentially flat (▲+1% YoY) against the total visitor day decline (▼-3% YoY), suggesting the overnight share edged up as the international segment (which has a higher overnight ratio) grew. Further, international visitor nights grew (▲+36% YoY) grew well ahead of visitor days indicating a significant shift away from day trips to more overnight stays in region. With softer international guest night growth (▲+14% YoY) it appears that more international visitors are choosing non-commercial stays. The rolling 12 month trend for total visitor days (▼-1% YoY) confirms this month is a marginal softening rather than a sharp break.

Rising markets overtake the traditional leader for the top international position

Domestic visitation contracted at the headline level (▼-9% YoY), with a clear divergence between tiers: the two top markets (Canterbury at 37% share and Otago at 27% share) contracted structurally, Canterbury (▼-11% YoY, QE ▼-9%) and Otago (▼-13% YoY, QE ▼-14%), both confirmed by quarter ending trends. The three big North Island markets Auckland, Waikato and Wellington told different stories with Wellington declining significantly this month against a more moderate quarter ending result indicating a partial effect due to a shift in travel timing (▼-14% YoY, QE ▼-4%). Auckland showed more moderate declines (▼-7% YoY) and Waikato showed slight growth (▲+2% YoY). Internationally, all three top markets grew strongly and China, Japan & Korea overtook Europe for the leading position (30% share), with growth well above the quarter ending trend (▲+65% YoY monthly vs ▲+17% QE), suggesting an acceleration in March. Europe grew (▲+15% YoY) and Australia surged (▲+42% YoY, QE ▲+38%), both structurally confirmed. Rest of Asia grew (▲+24% YoY) while USA & Canada held essentially flat (▲+3% YoY), a notable slowdown given the quarter ending picture (▲+37% QE) suggests the strong growth was concentrated in earlier months.

Domestic spending rebounds sharply after a soft prior month on broad market strength

Domestic visitor spending rebounded sharply after a soft prior month, jumping ▲+13% YoY against a national benchmark of ▲+4% YoY, ranking 4th in the South Island. This represents a significant turnaround from the prior month (▼-4% YoY) and sits above the rolling 12 month trend (▲+8% YoY). The top source market, Canterbury (56% share), grew (▲+11% YoY) after declining the prior month (▼-4%), while Otago (11% share) jumped (▲+43% YoY) and Auckland (8% share) jumped (▲+38% YoY). The spending lift alongside a domestic visitor day decline (▼-9% YoY) suggests a substantial increase in average spend per domestic visitor, consistent with the shift toward commercial accommodation captured in the guest night data.

American spending surges to dominate the international picture and lift the headline

International visitor spending jumped ▲+27% YoY, ranking 2nd in the South Island and outpacing the national benchmark (▲+16% YoY). The top source market, the United States (36% share), surged (▲+65% YoY), continuing an accelerating trend from the prior month (▲+48% YoY). Australia (17% share), however, contracted (▼-12% YoY) after growing the prior month (▲+8% YoY). Among medium tier markets, the United Kingdom (11% share) grew (▲+23% YoY) and Rest of Europe (10% share) grew (▲+15% YoY), both moderating from stronger prior month results. The rolling 12 month trend (▲+33% YoY) sits above the monthly figure, suggesting this month's growth was a continuation of strong momentum rather than a step change.

Top-ranked accommodation performance as supply contraction amplifies rising demand

Timaru recorded the strongest accommodation performance in the South Island this month, ranking 1st of 16 for both guest night growth and occupancy rate growth. Total guest nights jumped ▲+16% YoY, driven by a surge in arrivals (▲+20% YoY) which more than offset a slight shortening of stays (average length of stay ▼-3% YoY). Occupancy reached 65% (▲+14%pt. YoY), boosted by a contraction in available capacity (▼-8% YoY) that concentrated demand into fewer available units. Domestic and international guest nights grew at a similar rate (▲+16% YoY and ▲+14% YoY respectively), a rare month of lockstep performance across segments.

Small motels run at high capacity while holiday parks capture domestic growth

Holiday Parks & Campgrounds and Motels & Apartments (6-20) are increasingly serving different visitor segments. Holiday Parks (49% share of guest nights) grew on the back of domestic demand (▲+20% YoY domestic guest nights) while international guest nights in the same category held essentially flat (▲+2% YoY). Motels & Apartments (6-20) (29% share) showed the opposite pattern: international guest nights surged (▲+35% YoY) while domestic guest nights grew more moderately (▲+12% YoY). Holiday Parks occupancy lifted ▲+14%pt. YoY to 51%, while Motels & Apartments (6-20) ran at 82% occupancy (▲+7%pt. YoY). Lodges & Boutique (4% share) contracted across both segments (▼-26% YoY total guest nights) but coming from a small base.

Hospitality earnings surge while transport roles contract after mid-month disruptions

Timaru's tourism workforce held steady on jobs in line with the national benchmark. Filled jobs in hospitality grew: Food & Beverage Services (55% of filled jobs) grew jobs (▲+4% YoY) and Accommodation (15% of filled jobs) jumped (▲+17% YoY jobs). Meanwhile the mobility sectors pulled in the opposite direction: Transport Services contracted (▼-23% YoY jobs) and Transport Support Services also shed positions (▼-17% YoY jobs), a pattern that may partly reflect the fuel crisis. The structural picture is one of hospitality led earnings growth masking workforce contraction in transport.

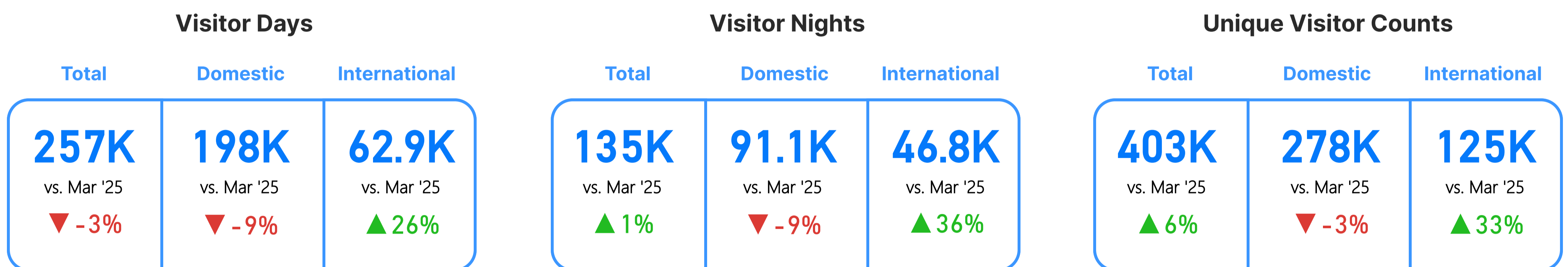
Visitation Overview

Venture Timaru - March 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.

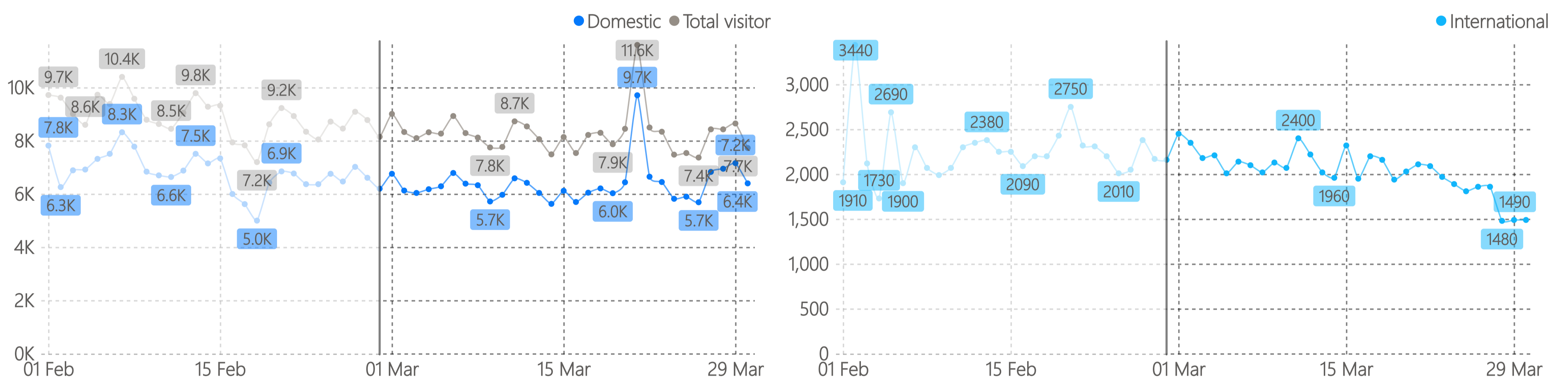
“ Timaru was one of only two South Island RTOs to record a total visitor day decline this month, ranking 15th of 16, with soft domestic demand masking a strong international rebound. Domestic visitor days fell (▼-9% YoY), placing the region second to last among South Island peers, while international visitor days jumped (▲+26% YoY). Total visitor nights held essentially flat (▲+1% YoY) against the total visitor day decline (▼-3% YoY), suggesting the overnight share edged up as the international segment (which has a higher overnight ratio) grew. ”

Visitation

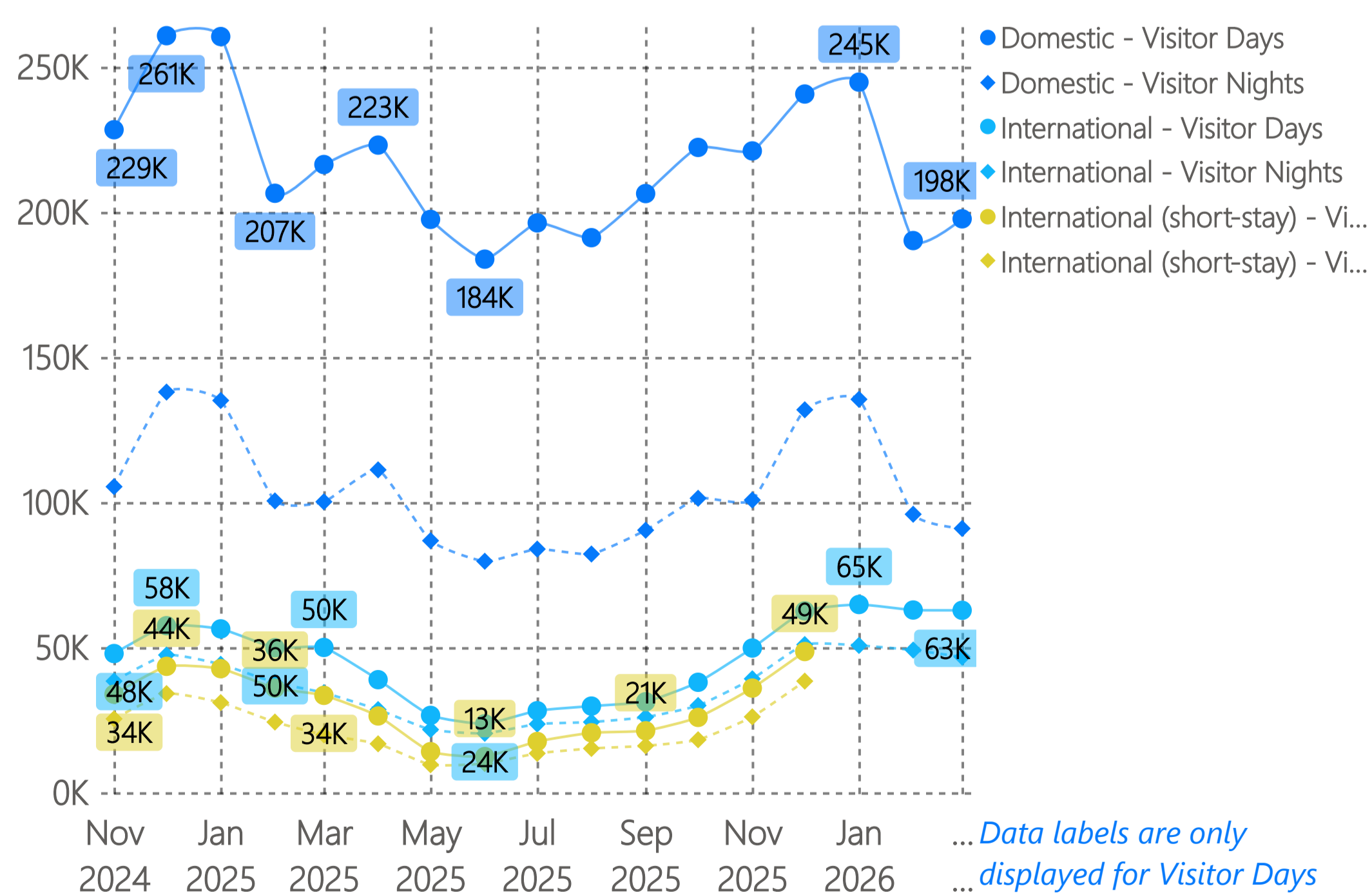


Note: Visitor days represent the cumulative sum of peak daytime visitor counts. To most accurately capture peak daily total visitor counts these are calculated separately from domestic and international, as peak times may vary between the domestic and international visitor populations.

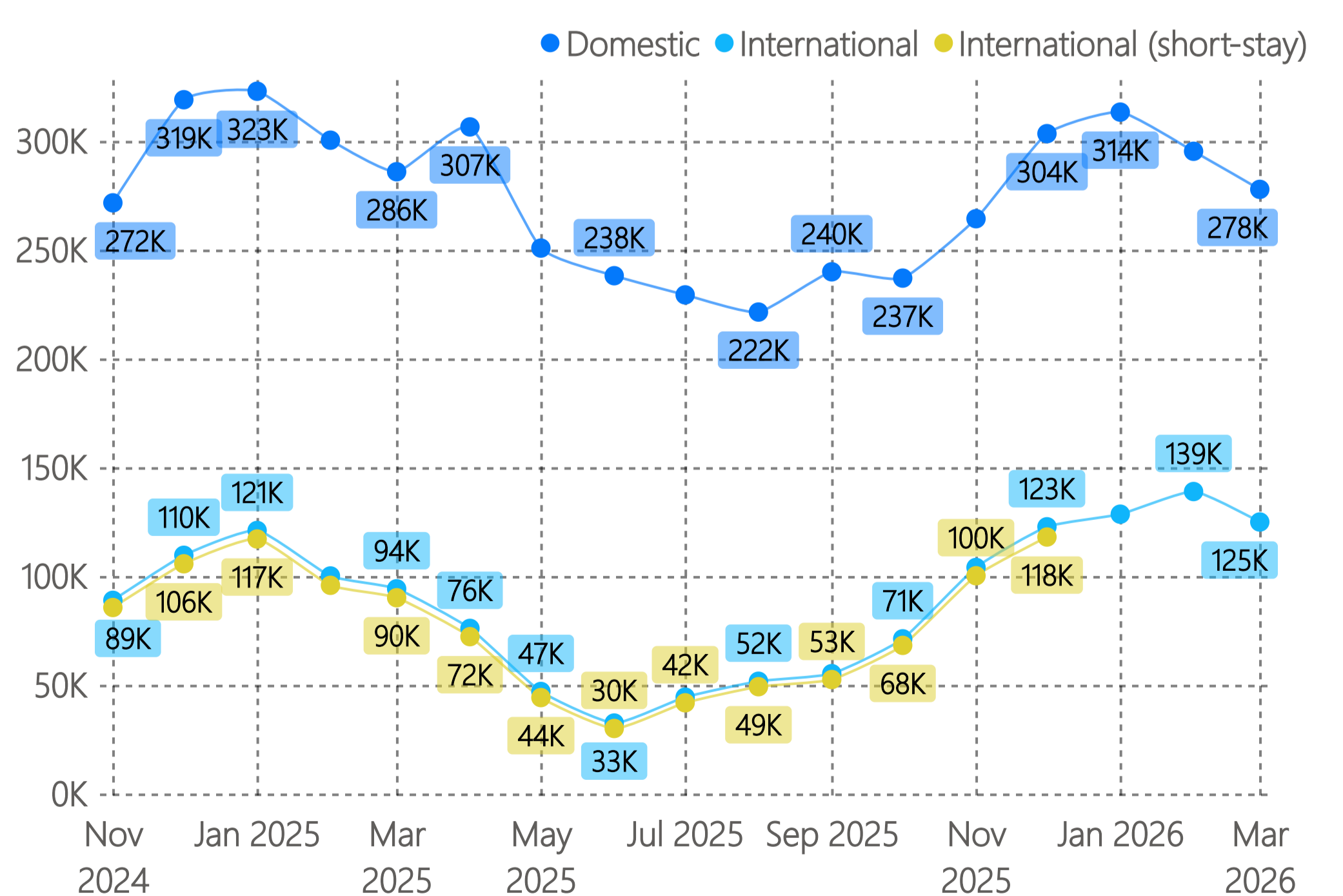
Peak Daytime Visitor Volume



Monthly Visitor Days & Visitor Nights



Monthly Unique Visitors



Visitation Overview

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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	767K	25.3%	▲9%	1.4M	38.3%	▲10%	443K	28.0%	▲4%
Marlborough	312K	10.3%	▲1%	606K	16.1%	▲2%	443K	28.0%	▲4%
Mackenzie	336K	11.1%	▲15%	379K	10.1%	▲30%	289K	18.2%	▲26%
West Coast	240K	7.9%	▲10%	420K	11.2%	▲17%	291K	18.4%	▲13%
Waitaki	441K	14.6%	▲9%	296K	7.9%	▲7%	156K	9.8%	▲10%
Timaru	403K	13.3%	▲6%	257K	6.8%	▼-3%	135K	8.6%	▲1%
Kaikoura	188K	6.2%	▲1%	236K	6.3%	▲5%	198K	12.5%	▼-2%
Hurunui	340K	11.2%	▼-2%	126K	3.4%	▲18%	70K	4.4%	▲4%

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	533K	27.0%	▲2%	678K	31.3%	▼-4%	313K	32.1%	▲0%
Marlborough	204K	10.3%	▼-9%	414K	19.1%	▼-4%	313K	32.1%	▲0%
Waitaki	277K	14.0%	▼-1%	219K	10.1%	▼-2%	106K	10.9%	▲0%
Timaru	278K	14.1%	▼-3%	198K	9.1%	▼-9%	91K	9.3%	▼-9%
West Coast	137K	6.9%	▼-1%	223K	10.3%	▲0%	154K	15.8%	▼-3%
Mackenzie	171K	8.6%	▲2%	197K	9.1%	▲20%	133K	13.6%	▲14%
Kaikoura	119K	6.0%	▼-9%	161K	7.4%	▼-12%	137K	14.0%	▼-18%
Hurunui	255K	12.9%	▼-9%	73K	3.4%	▲9%	42K	4.3%	▼-1%

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	234K	22.3%	▲31%	768K	47.1%	▲27%	158K	25.6%	▲38%
Mackenzie	165K	15.7%	▲33%	189K	11.6%	▲43%	158K	25.6%	▲38%
West Coast	103K	9.7%	▲29%	200K	12.3%	▲44%	138K	22.4%	▲42%
Marlborough	108K	10.2%	▲26%	195K	12.0%	▲19%	131K	21.3%	▲15%
Waitaki	164K	15.5%	▲33%	81K	4.9%	▲42%	51K	8.3%	▲39%
Timaru	125K	11.9%	▲33%	63K	3.9%	▲26%	47K	7.6%	▲36%
Kaikoura	69K	6.6%	▲25%	79K	4.8%	▲67%	62K	10.0%	▲72%
Hurunui	85K	8.1%	▲27%	55K	3.4%	▲32%	29K	4.8%	▲12%

Domestic Visitation

Venture Timaru - March 2026

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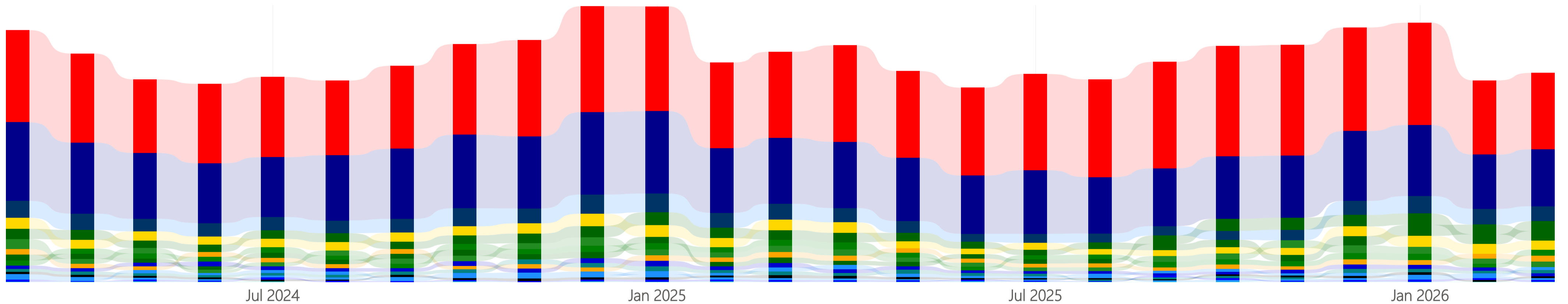
Domestic Visitation — By Market

Visitor Origin by Regional Council Domestic Visitor Days Share of Domestic Visitor Days YoY Domestic Visitor Days

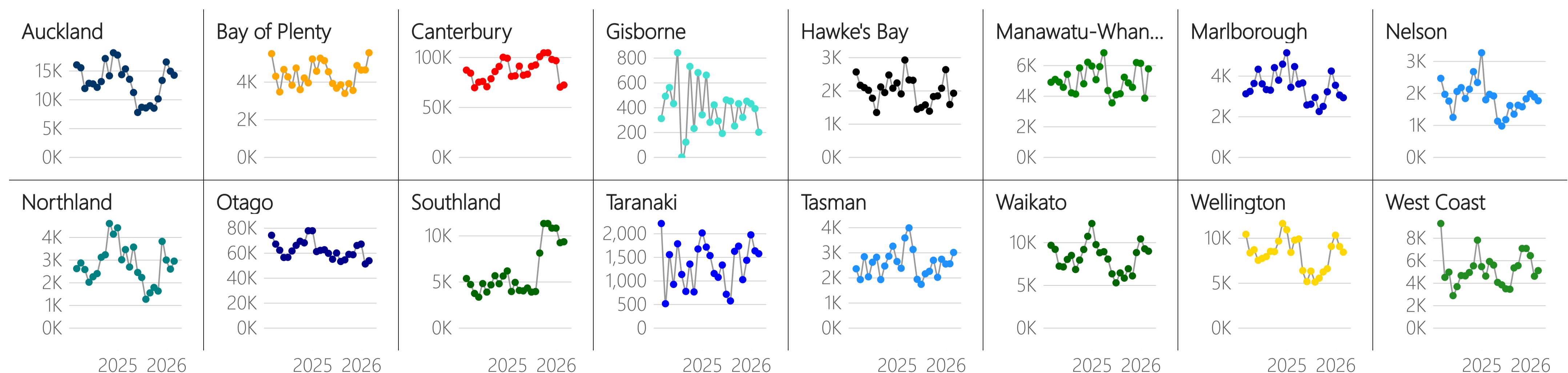
Regional Council	Domestic Visitor Days	Share of Domestic Visitor Days	YoY Domestic Visitor Days
Canterbury	72,100	36.5%	▼-11%
Otago	53,700	27.2%	▼-13%
Auckland	14,200	7.2%	▼-7%
Southland	9,320	4.7%	▲89%
Waikato	8,960	4.5%	▲2%
Wellington	8,410	4.3%	▼-14%
Manawatu-Whanganui	5,770	2.9%	▼-2%
Bay of Plenty	5,540	2.8%	▲6%
West Coast	5,090	2.6%	▼-14%
Tasman	3,000	1.5%	▼-16%
Northland	2,940	1.5%	▼-15%
Marlborough	2,920	1.5%	▼-34%
Hawke's Bay	1,920	1.0%	▼-34%
Nelson	1,760	0.9%	▼-10%
Taranaki	1,570	0.8%	▲3%
Gisborne	200	0.1%	▼-29%

Domestic Visitation — Ranked by Market

Legend: Auckland, Bay of Plenty, Canterbury, Gisborne, Hawke's Bay, Manawatu-Whanganui, Marlborough, Nelson, Northland, Otago, Southland, Taranaki, Tasman, Waikato, Wellington, West Coast



Domestic Visitation Trends — By Market



International Visitation

Venture Timaru - March 2026

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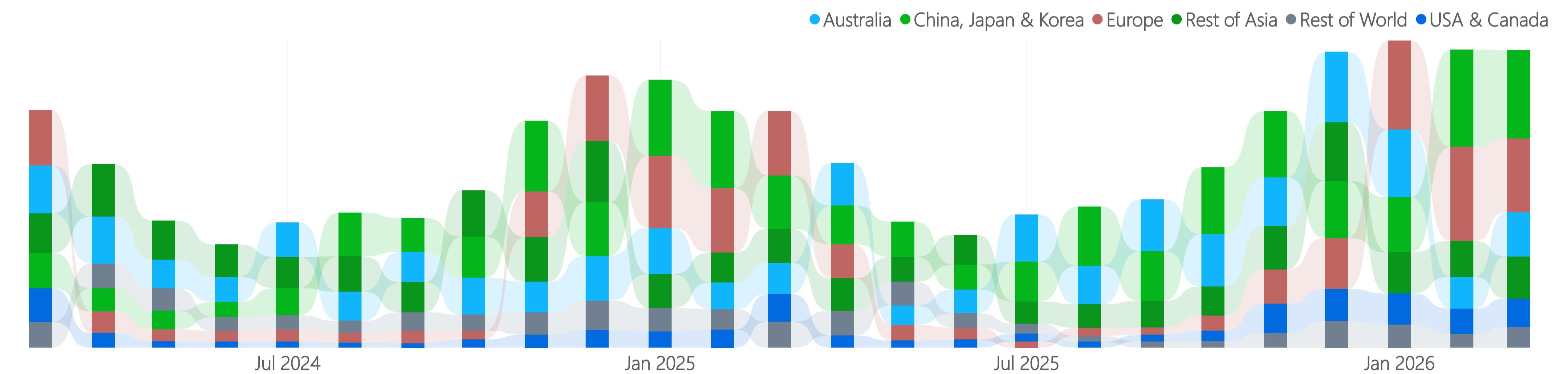
On the international side, Europe overtook China, Japan & Korea to become Timaru's largest source market (33% share), growing ▲+53% YoY. China, Japan & Korea (27% share) grew modestly (▲+4% YoY) but lost its leading position. Rest of Asia (▲+23% YoY), Australia (▲+32% YoY), and USA & Canada (▲+55% YoY)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



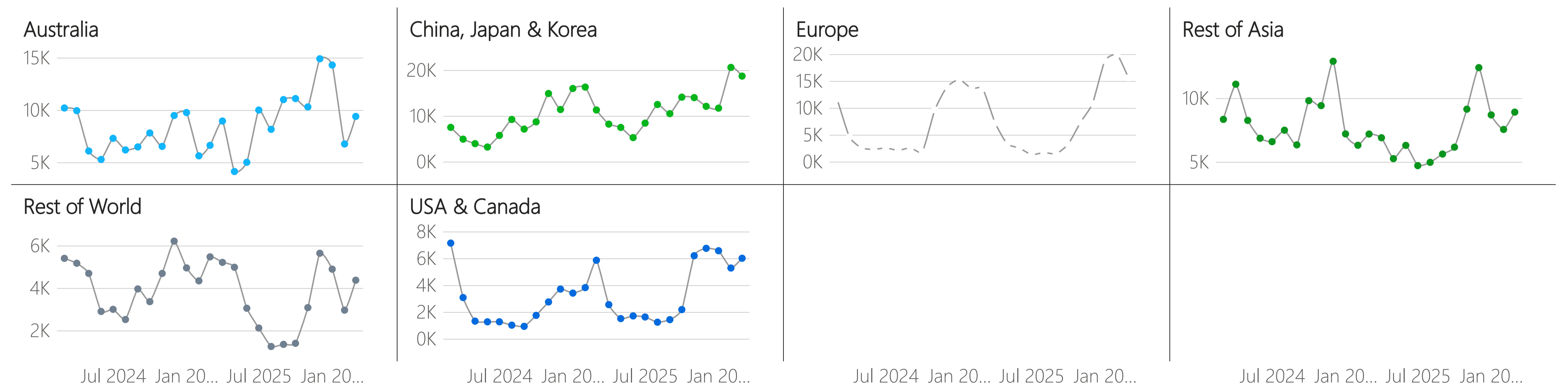
International Visitation — By Market

Overseas markets	International total visitor days	Share of Total International Visitor Days	YoY Total International Visitor Days
China, Japan & Korea	18,700	29.7%	▲65%
Europe	15,600	24.8%	▲15%
Australia	9,390	14.9%	▲42%
Rest of Asia	8,910	14.1%	▲24%
USA & Canada	6,010	9.5%	▲3%
Rest of World	4,370	6.9%	▼-20%

International Visitation — Ranked by Market



International Visitation Trends — By Market



Visitor Spending Overview

Venture Timaru - March 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.

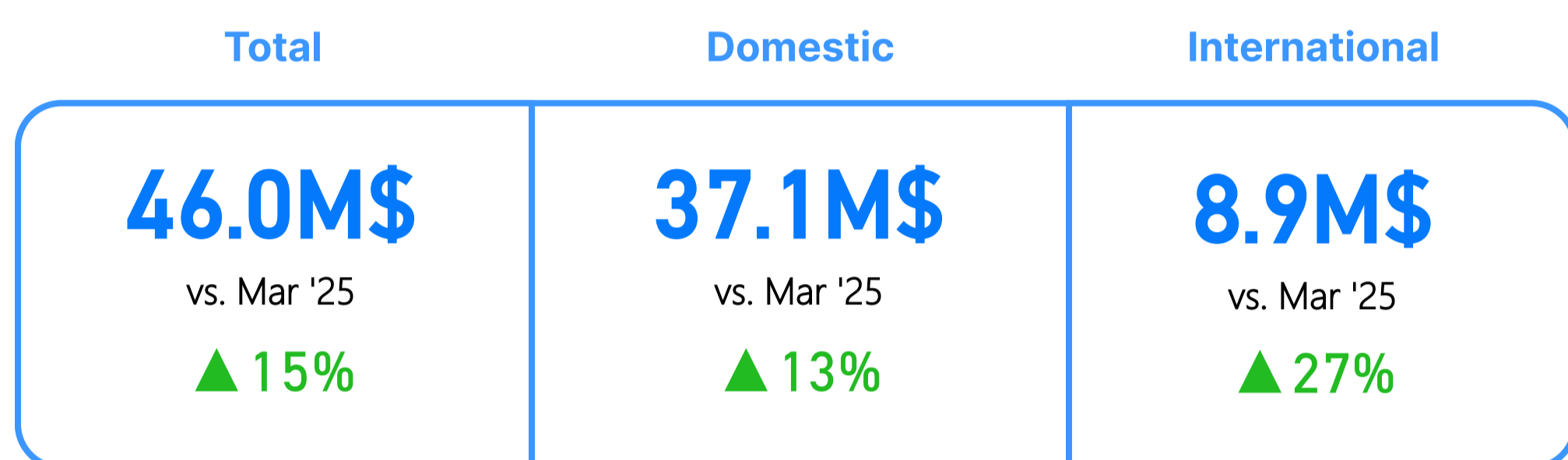


Domestic visitor spending rebounded sharply after a soft prior month, jumping ▲+13% YoY against a national benchmark of ▲+4% YoY, ranking 4th in the South Island. This represents a significant turnaround from the prior month (▼-4% YoY) and sits above the rolling 12 month trend (▲+8% YoY). The top source market, Canterbury (56% share), grew (▲+11% YoY) after declining the prior month (▼-4%), while Otago (11% share) jumped (▲+43% YoY) and Auckland (8% share) jumped (▲+38% YoY).

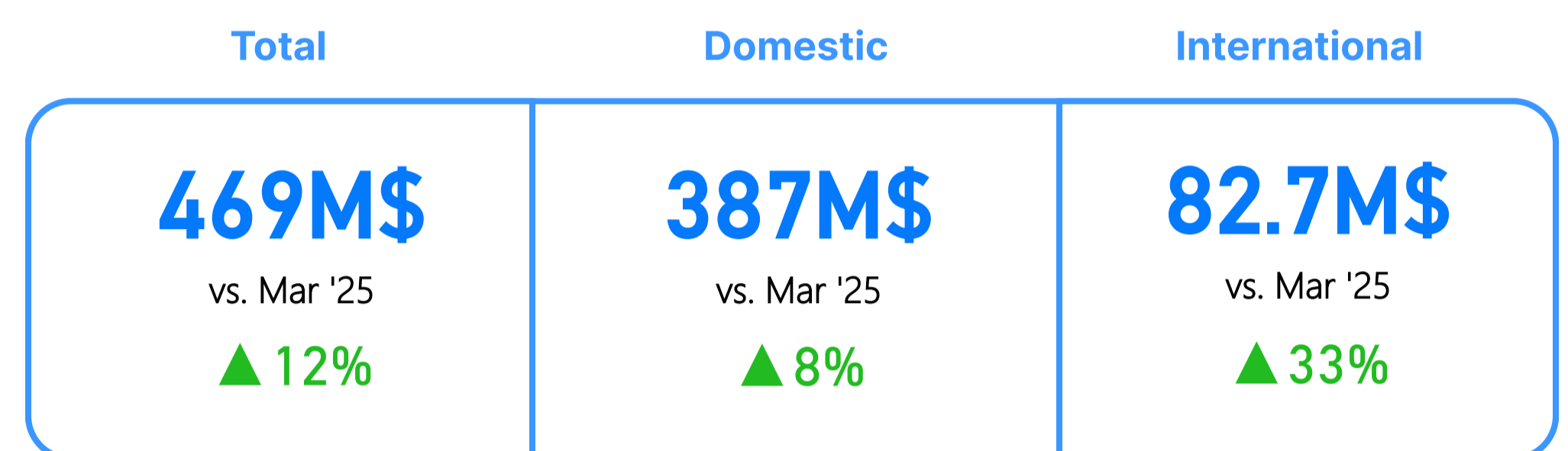


Visitor Spend

Monthly Visitor Spending

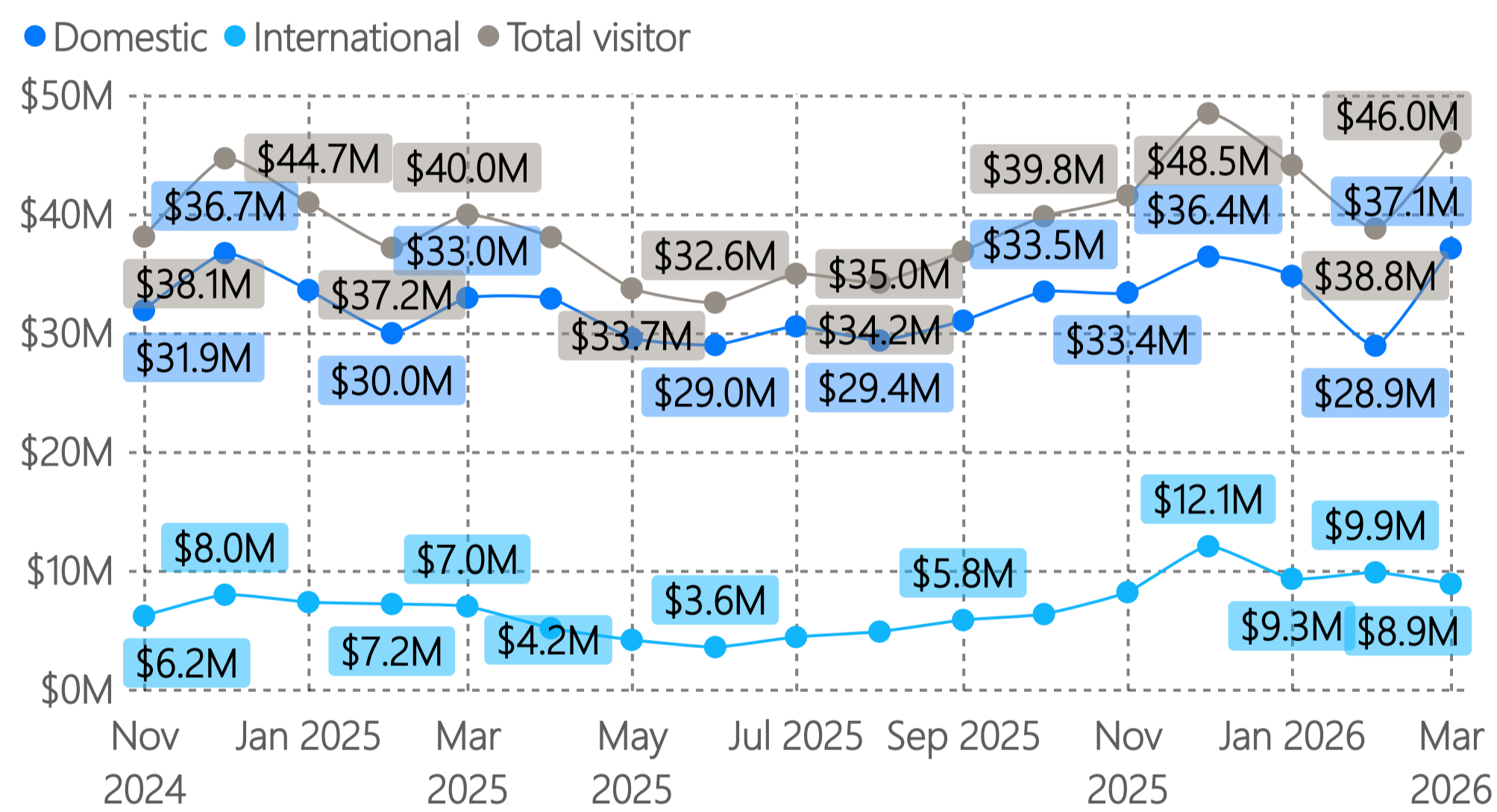


Year-Ending Visitor Spending

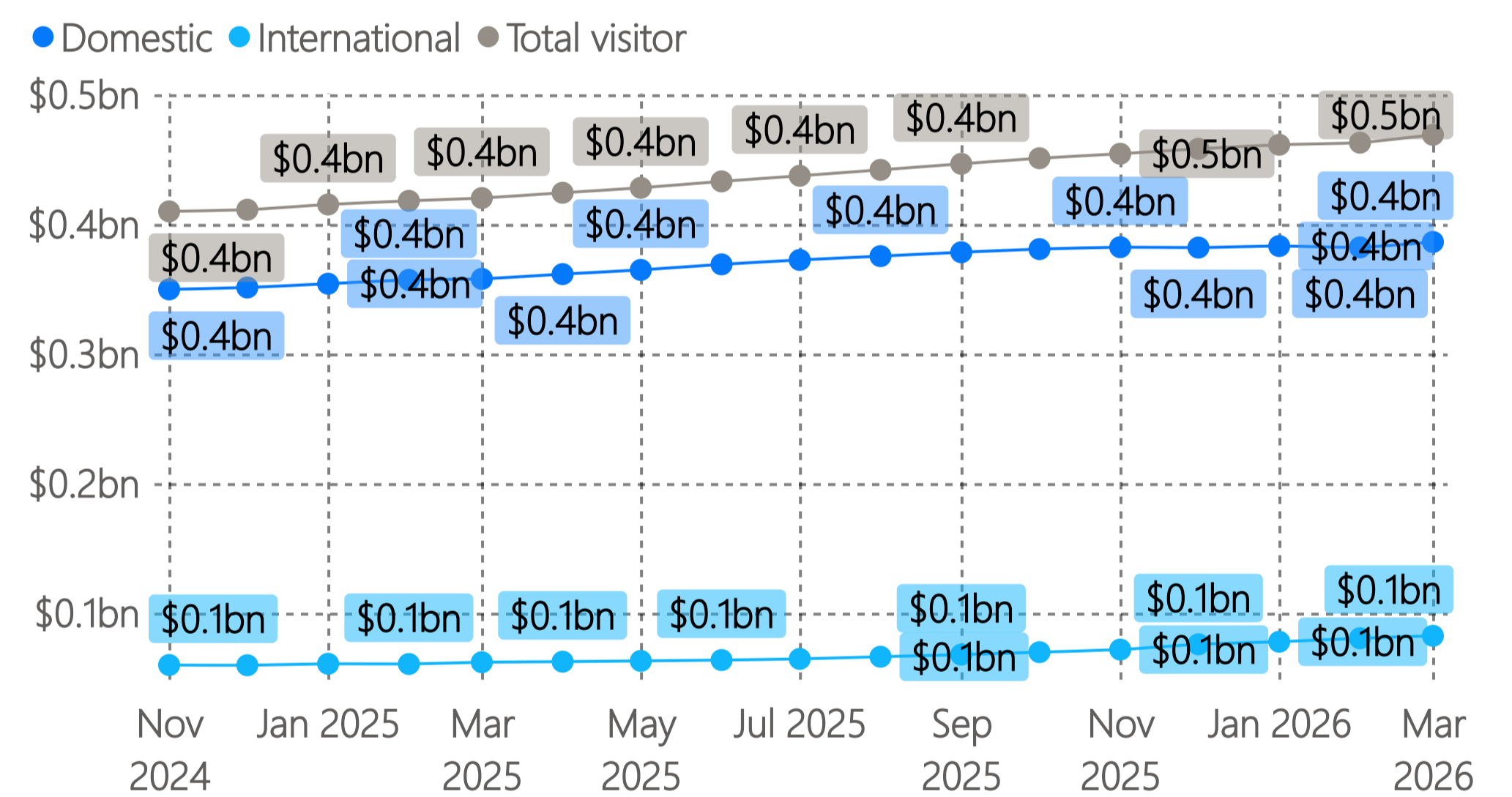


Visitor Spend Trends

Monthly Visitor Spending



Year-Ending Visitor Spending



Visitor Spend Benchmarks



Domestic Benchmark

RTO	Monthly figure		Year-Ending figure	
	Visitor Spending	Relative Share YoY of Market	Visitor Spending	Relative Share YoY of Market
Canterbury	\$208M	52.1% ▲10%	\$2.4B	53.7% ▲4%
West Coast	\$53.9M	13.5% ▲14%	\$536M	12.3% ▲7%
Marlborough	\$38.9M	9.7% ▼-3%	\$424M	9.7% ▲4%
Timaru	\$37.1M	9.3% ▲13%	\$387M	8.8% ▲8%
Waitaki	\$22.5M	5.6% ▲7%	\$238M	5.4% ▲6%
Mackenzie	\$15.2M	3.8% ▲6%	\$177M	4.0% ▼0%
Hurunui	\$14.5M	3.6% ▲5%	\$160M	3.6% ▲3%
Kaikoura	\$9.1M	2.3% ▲6%	\$102M	2.3% ▲10%



International Benchmark

RTO	Monthly figure		Year-Ending figure	
	Visitor Spending	Relative Share YoY of Market	Visitor Spending	Relative Share YoY of Market
Canterbury	\$199M	60.1% ▲20%	\$1.9B	64.2% ▲22%
West Coast	\$51.4M	15.5% ▲9%	\$372M	12.5% ▲10%
Mackenzie	\$28.0M	8.5% ▲12%	\$259M	8.7% ▲9%
Marlborough	\$24.0M	7.3% ▼-6%	\$204M	6.8% ▲8%
Timaru	\$8.9M	2.7% ▲27%	\$82.7M	2.8% ▲33%
Kaikoura	\$9.3M	2.8% ▲23%	\$64.6M	2.2% ▲20%
Waitaki	\$7.3M	2.2% ▲27%	\$61.0M	2.0% ▲15%
Hurunui	\$3.1M	0.9% ▲16%	\$24.8M	0.8% ▲7%

Visitor Spending by Product

Venture Timaru - March 2026

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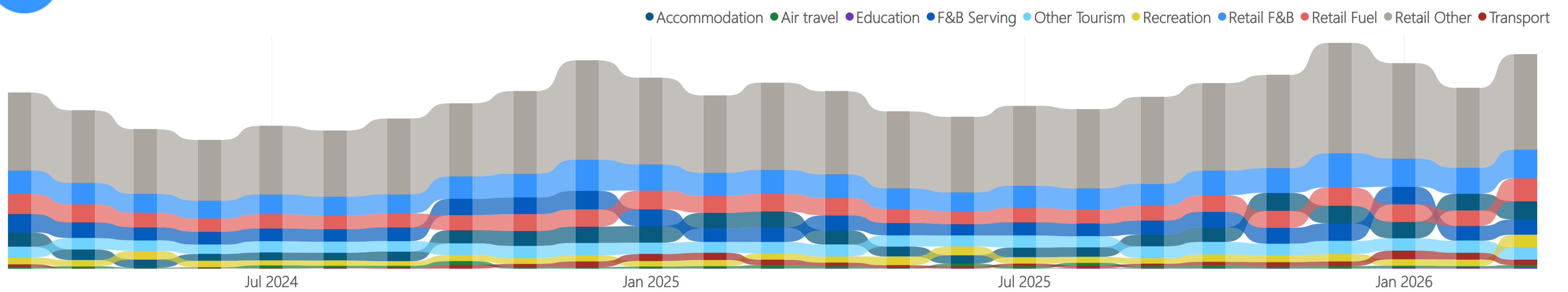
Visitors spent more on nearly every category, but the behavioural mix shifted toward self catering and driving. Food & Beverage Retail (grocery and takeaway) jumped (▲+19% YoY) while Food & Beverage Serving Services (dining out) grew only modestly (▲+4% YoY), a pattern consistent with visitors choosing to self cater rather than dine out. Fuel & Automotive Products surged (▲+28% YoY) amid the fuel crisis, while Accommodation grew at a lower rate (▲+16% YoY).



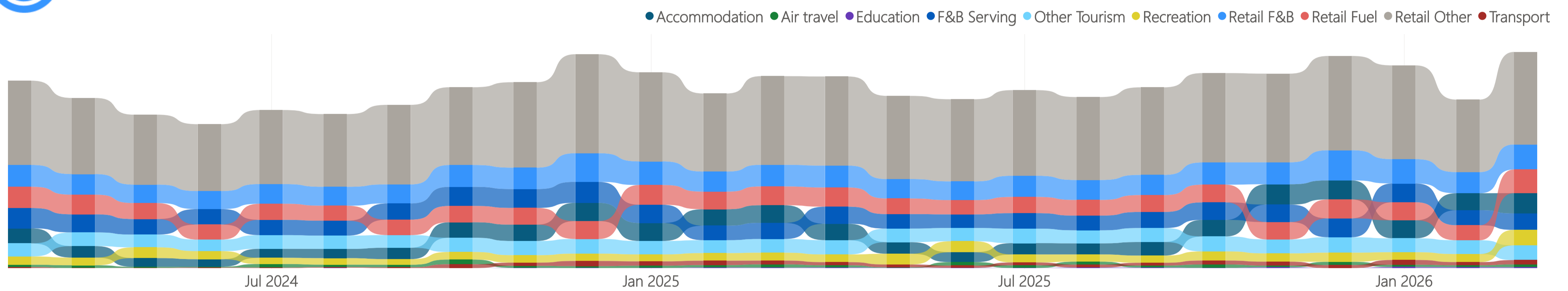
Product Overview

Product	Domestic Visitor Spend	Share of Domestic Visitor Spend	YoY Domestic Visitor Spend	International Visitor Spend	Share of International Visitor Spend	YoY International Visitor Spend	Total Visitor Spend	Share of Total Visitor Spend	YoY Total Visitor Spend
Retail Other	\$15,890,979	42.8%	▲4%	\$4,578,729	51.5%	▲31%	20,469,708.09	44.48%	▲9%
Retail F&B	\$4,302,756	11.6%	▲16%	\$1,852,731	20.8%	▲29%	6,155,486.28	13.38%	▲19%
Retail Fuel	\$4,058,567	10.9%	▲26%	\$846,746	9.5%	▲40%	4,905,313.66	10.66%	▲28%
Accommodation	\$3,484,017	9.4%	▲15%	\$462,519	5.2%	▲25%	3,946,535.88	8.58%	▲16%
F&B Serving	\$2,826,262	7.6%	▲2%	\$423,115	4.8%	▲17%	3,249,376.51	7.06%	▲4%
Recreation	\$2,661,475	7.2%	▲97%	\$50,953	0.6%	▲85%	2,712,428.35	5.89%	▲96%
Other Tourism	\$2,521,526	6.8%	▲7%	\$177,031	2.0%	▲72%	2,698,557.29	5.86%	▲10%
Transport	\$747,940	2.0%	▲15%	\$381,397	4.3%	▼-23%	1,129,337.30	2.45%	▼-1%
Air travel	\$483,945	1.3%	▼-13%	\$0	0.0%	-	483,945.13	1.05%	▼-26%
Education	\$141,336	0.4%	▲81%	\$124,456	1.4%	-	265,792.57	0.58%	▲240%

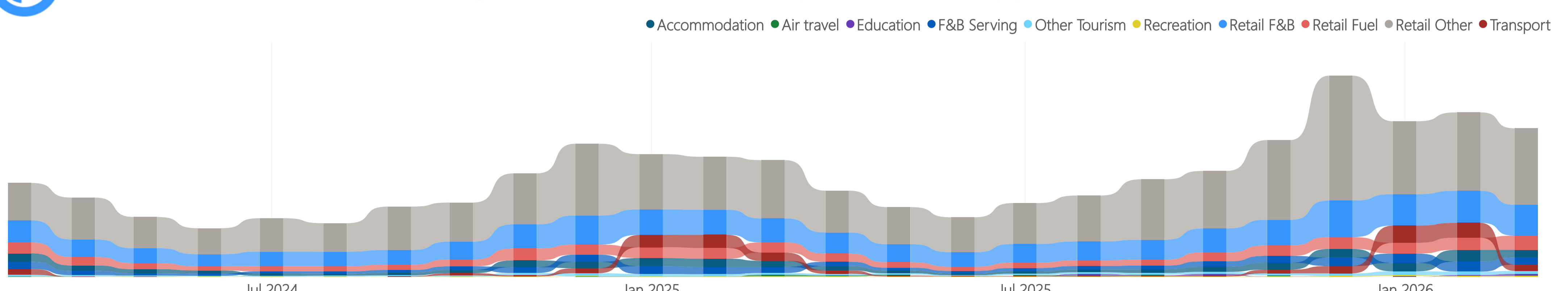
Total Visitor Spend — Ranked by Product Type



Domestic Visitor Spend — Ranked by Product Type



International Visitor Spend — Ranked by Product Type



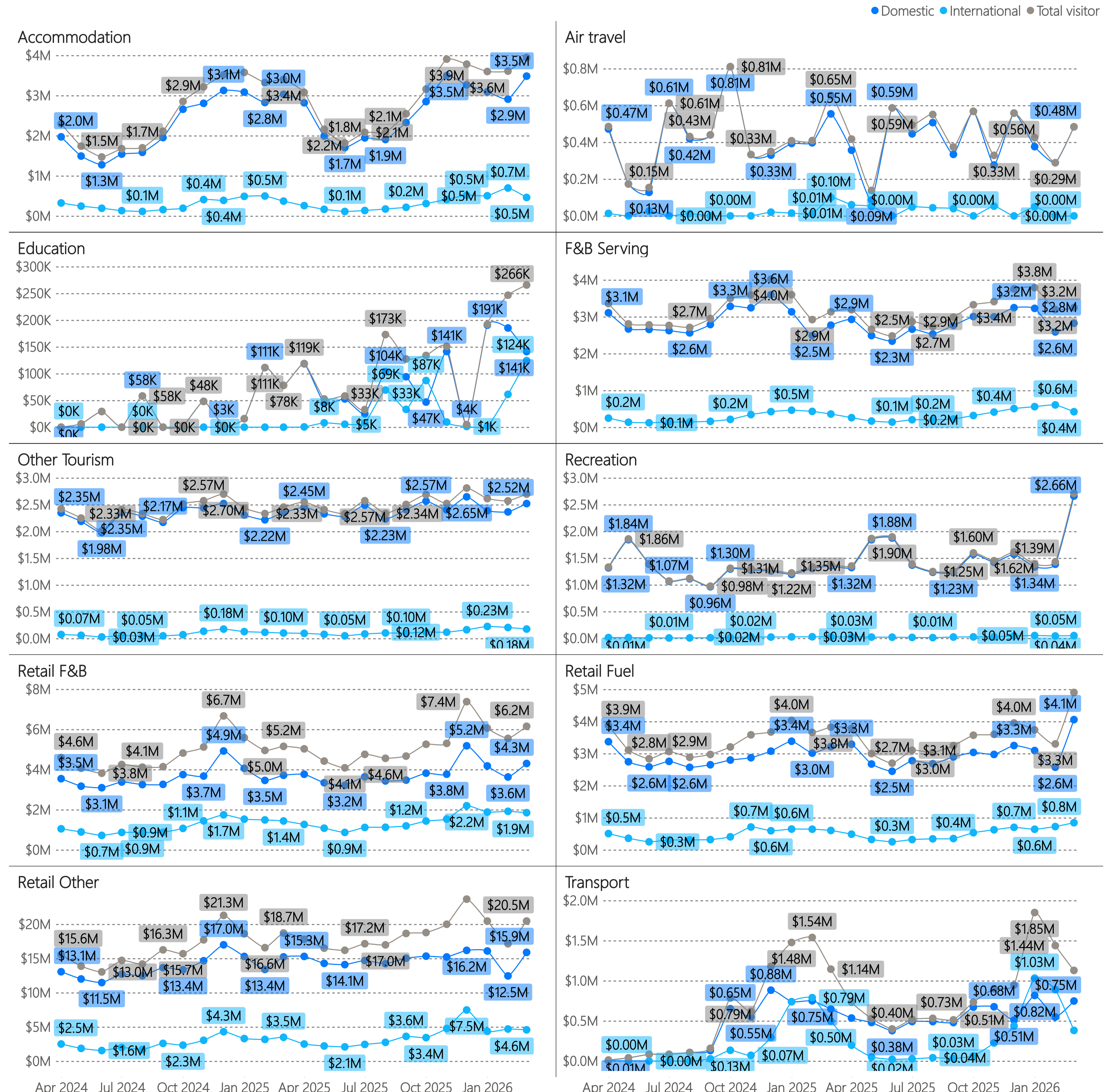
Visitor Spending by Product

Venture Timaru - March 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.

“Visitors spent more on nearly every category, but the behavioural mix shifted toward self catering and driving. Food & Beverage Retail (grocery and takeaway) jumped (▲+19% YoY) while Food & Beverage Serving Services (dining out) grew only modestly (▲+4% YoY), a pattern consistent with visitors choosing to self cater rather than dine out. Fuel & Automotive Products surged (▲+28% YoY) amid the fuel crisis, while Accommodation grew at a lower rate (▲+16% YoY).”

Trends by Product



Domestic Visitor Spend

Venture Timaru - March 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.



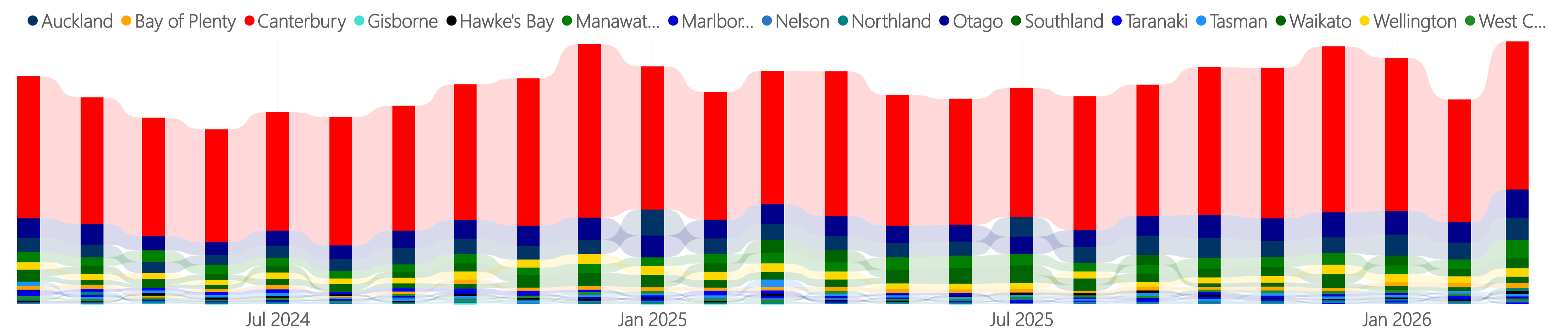
Domestic visitor spending rebounded sharply after a soft prior month, jumping ▲+13% YoY against a national benchmark of ▲+4% YoY, ranking 4th in the South Island. This represents a significant turnaround from the prior month (▼-4% YoY) and sits above the rolling 12 month trend (▲+8% YoY). The top source market, Canterbury (56% share), grew (▲+11% YoY) after declining the prior month (▼-4%), while Otago (11% share) jumped (▲+43% YoY) and Auckland (8% share) jumped (▲+38% YoY).



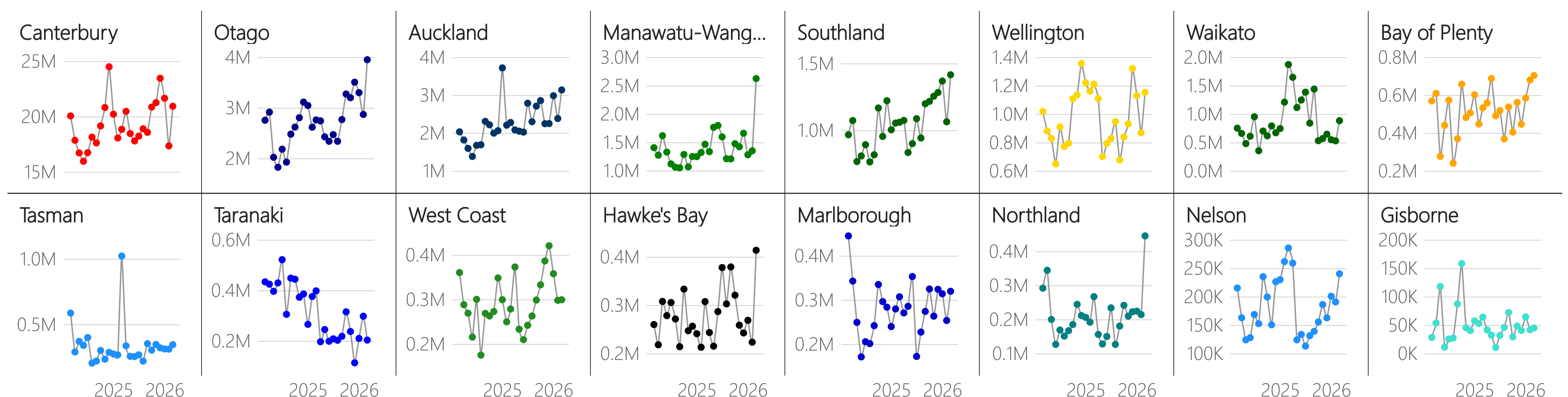
Domestic Spend — Table by Market

NZ Region	Domestic Visitor Spend	Share of Domestic Visitor Spend	YoY Domestic Visitor Spend
Canterbury	\$20,934,429	56.4%	▲11%
Otago	\$3,951,078	10.6%	▲43%
Auckland	\$3,137,573	8.5%	▲38%
Manawatu-Wanganui	\$2,625,156	7.1%	▲79%
Southland	\$1,415,747	3.8%	▲34%
Wellington	\$1,153,552	3.1%	▼-5%
Waikato	\$883,996	2.4%	▼-53%
Bay of Plenty	\$703,848	1.9%	▲32%
Northland	\$445,674	1.2%	▲67%
Hawke's Bay	\$413,730	1.1%	▲35%
Tasman	\$345,935	0.9%	▼-66%
Marlborough	\$319,745	0.9%	▲4%
West Coast	\$299,491	0.8%	▲8%
Nelson	\$240,281	0.6%	▼-16%
Taranaki	\$203,633	0.5%	▼-49%
Gisborne	\$44,934	0.1%	▼-30%

Domestic Spend — Ranked by Market



Visitor Spend Trends — By Market



International Visitor Spend

Venture Timaru - March 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.



International visitor spending jumped ▲+27% YoY, ranking 2nd in the South Island and outpacing the national benchmark (▲+16% YoY). The top source market, the United States (36% share), surged (▲+65% YoY), continuing an accelerating trend from the prior month (▲+48% YoY). Australia (17% share), however, contracted (▼-12% YoY) after growing the prior month (▲+8% YoY).



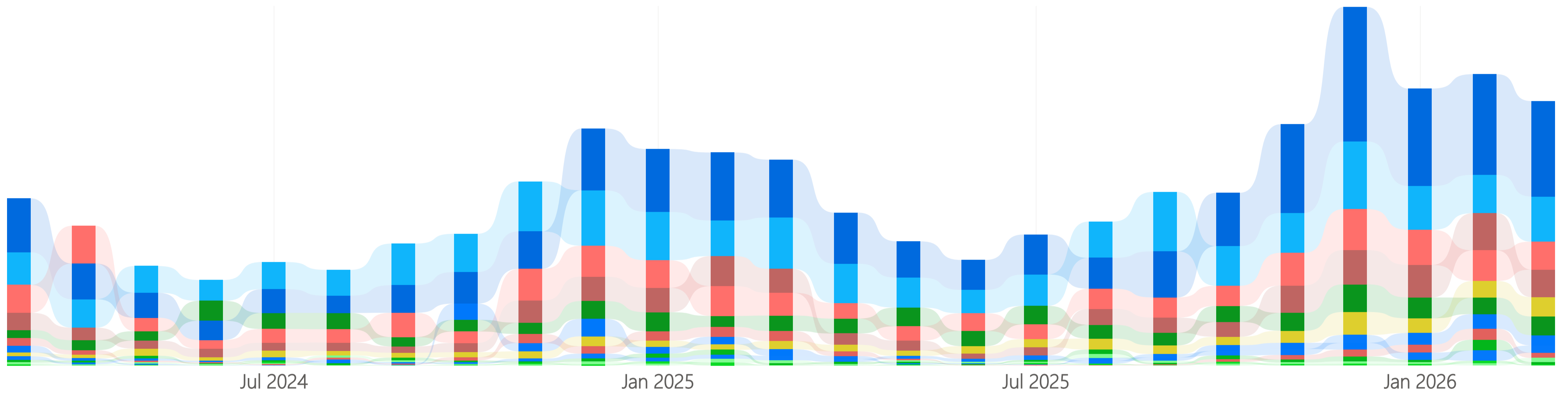
International Spend — Table by Market

Overseas Markets International Visitor Spend Share of International Visitor Spend YoY International Visitor Spend

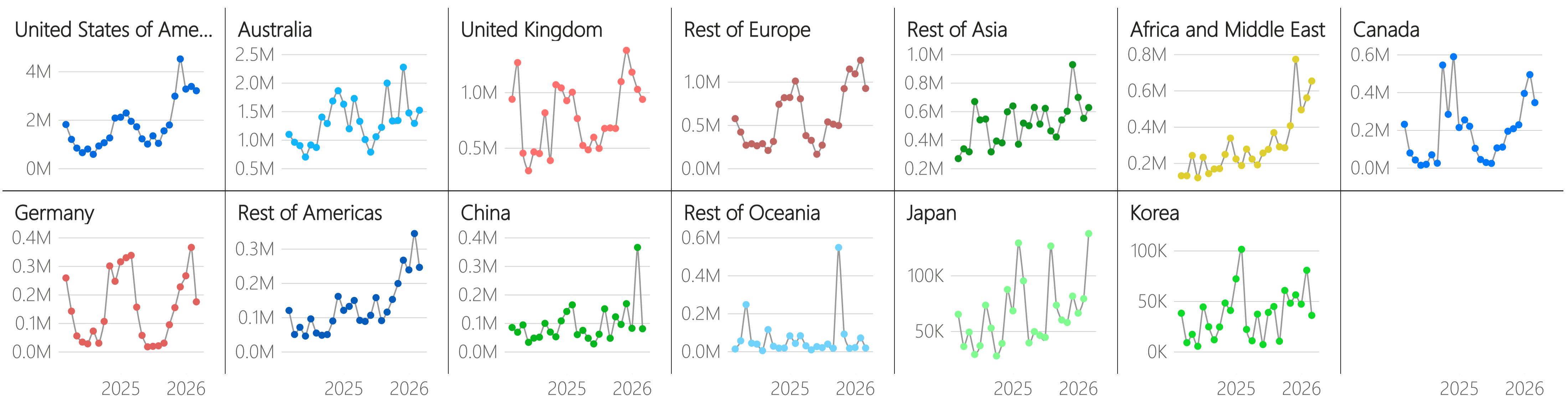
Overseas Markets	International Visitor Spend	Share of International Visitor Spend	YoY International Visitor Spend
United States of America	\$3,202,648	36.0%	▲65%
Australia	\$1,519,110	17.1%	▼-12%
United Kingdom	\$936,794	10.5%	▲23%
Rest of Europe	\$923,291	10.4%	▲15%
Africa and Middle East	\$652,453	7.3%	▲136%
Rest of Asia	\$626,317	7.0%	▲21%
Canada	\$345,170	3.9%	▲57%
Rest of Americas	\$245,777	2.8%	▲65%
Germany	\$174,602	2.0%	▼-48%
Japan	\$137,700	1.5%	▲45%
China	\$80,172	0.9%	▲34%
Korea	\$35,881	0.4%	▲63%
Rest of Oceania	\$17,764	0.2%	▼-78%

International Spend — Ranked by Market

● Africa and Middle East ● Australia ● Canada ● China ● Germany ● Japan ● Korea ● Rest of Americas ● Rest of Asia ● Rest of Europe ● United Kingdom ● United States of America



Visitor Spend Trends — By Market



Accommodation Overview

Venture Timaru - March 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 recorded the strongest accommodation performance in the South Island this month, ranking 1st of 16 for both guest night growth and occupancy rate growth. Total guest nights jumped ▲+16% YoY, driven by a surge in arrivals (▲+20% YoY) which more than offset a slight shortening of stays (average length of stay ▼-3% YoY). Occupancy reached 65% (▲+14%pt).



Commercial Accommodation

Occupancy

65%

vs. Mar '25

▲ 14%pt.

Guest Nights

39.0K

vs. Mar '25

▲ 16%

Available Stay Units

32.8K

vs. Mar '25

▼ -8%

Average Stay Length

1.6

vs. Mar '25

▼ -3%

Guest Arrivals

24.2K

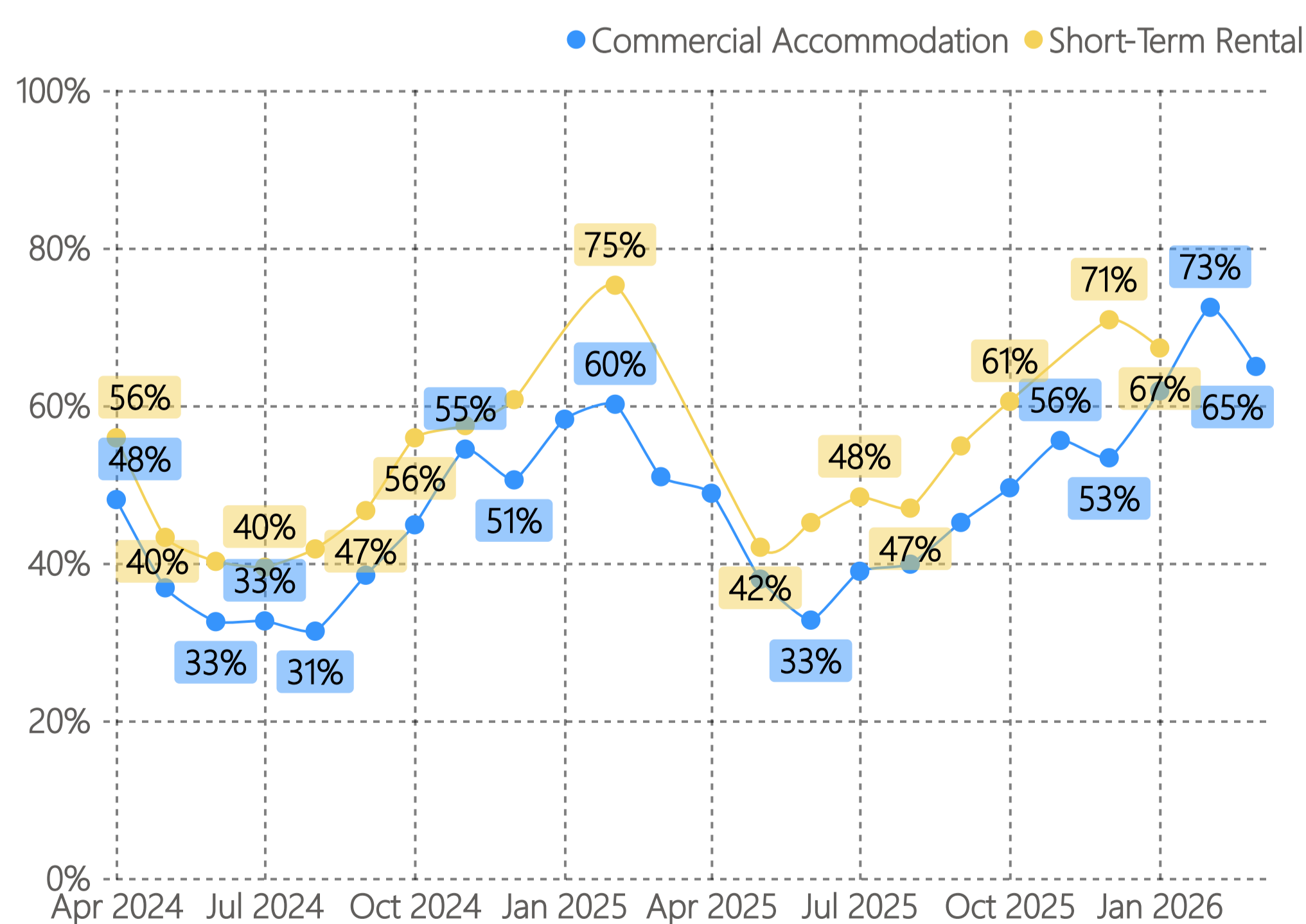
vs. Mar '25

▲ 20%

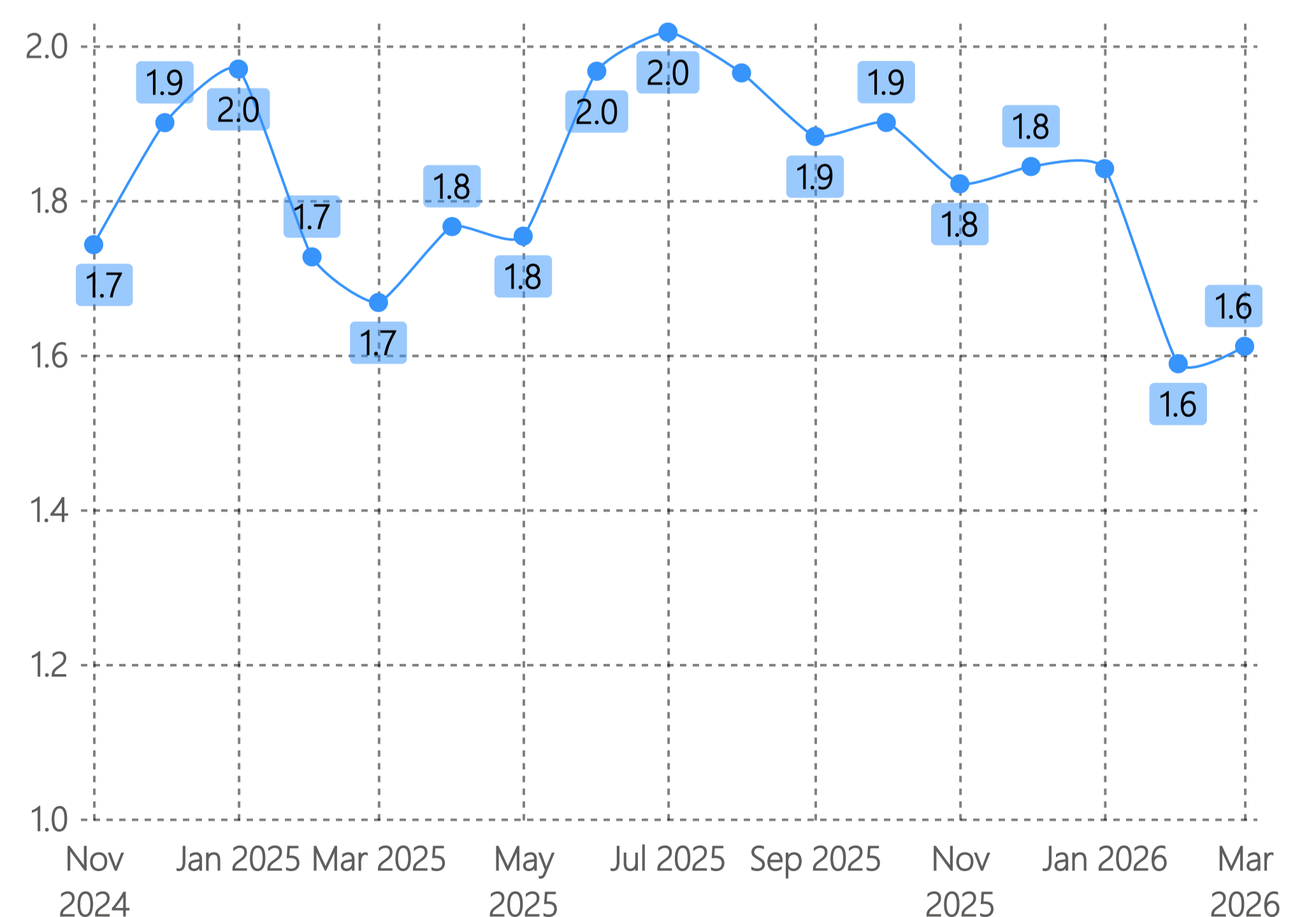
Short-term Rental Accommodation

Short-term rental data is unfortunately not available for March 2026 due to a significant data outage.

Occupancy



Average Stay Length in Commercial Accommodation



Accommodation Overview

Venture Timaru - March 2026

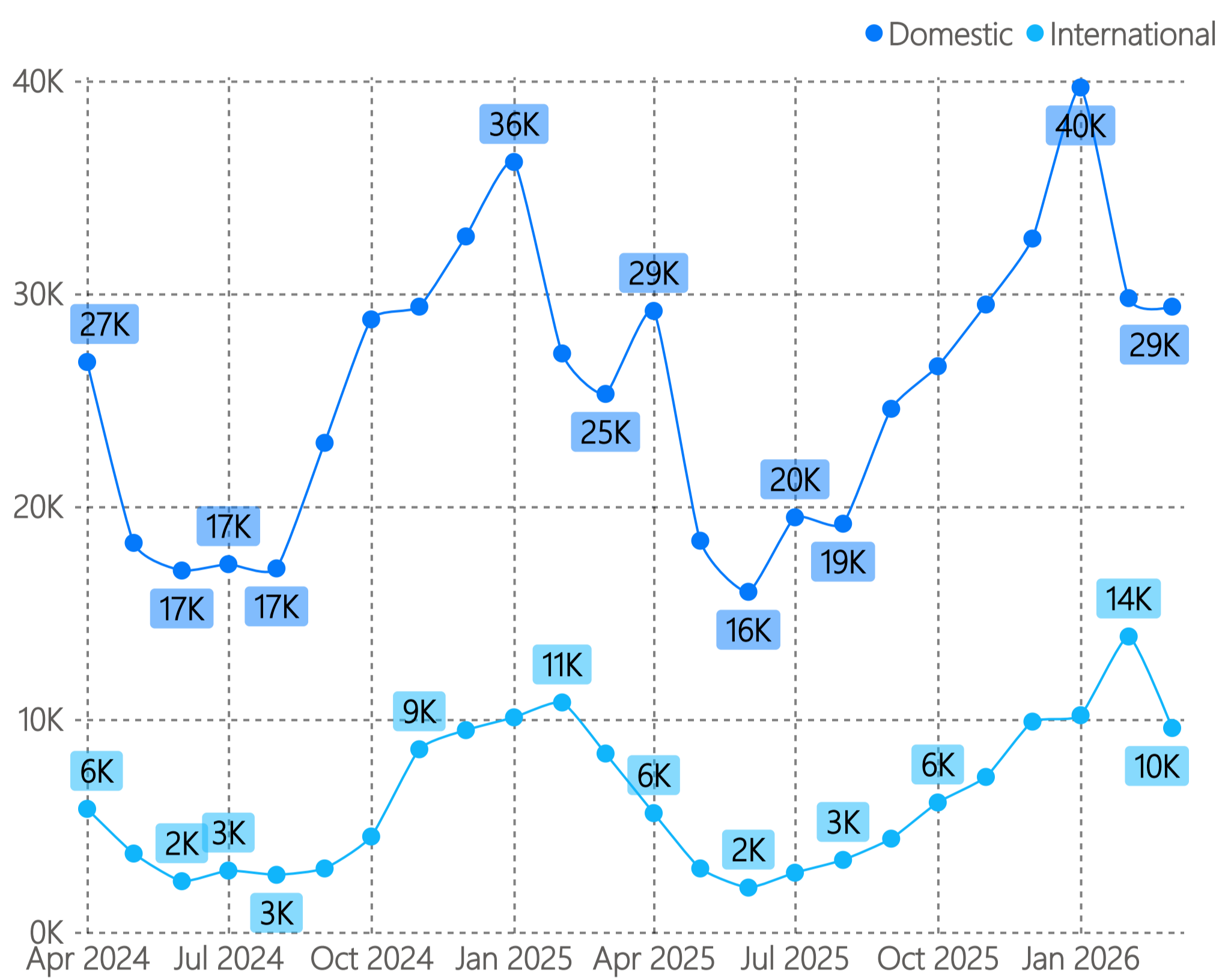
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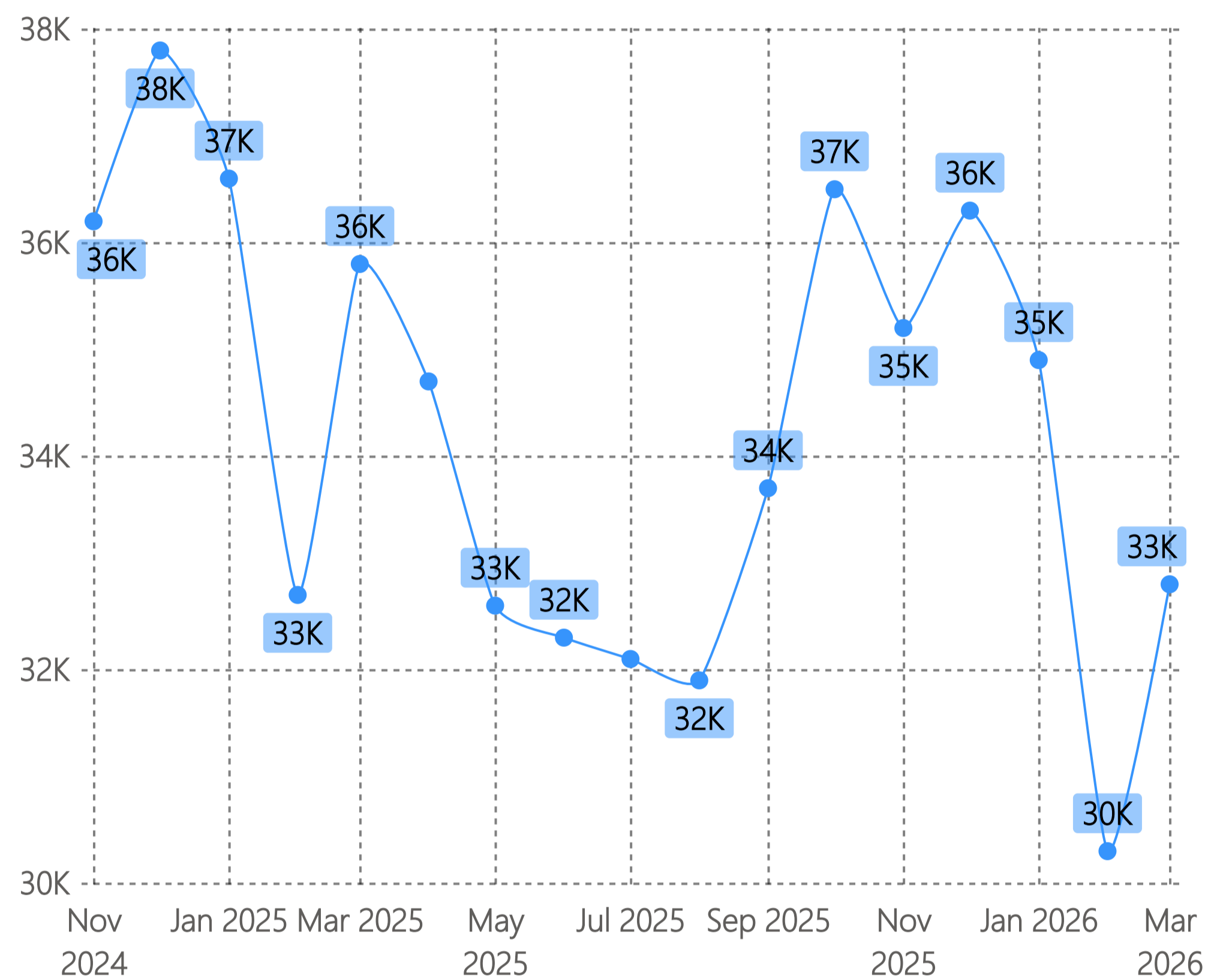
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Guest Nights in Commercial Accommodation



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	206K	43.1%	▼-2%	2.4M	46.8%	▲1%	
West Coast	69K	14.4%	▲14%	589K	11.6%	▼-4%	
Marlborough	45K	9.5%	▼-8%	465K	9.2%	▼-3%	
Mackenzie	41K	8.6%	▲12%	398K	7.9%	▲2%	
Waitaki	33K	6.8%	▲0%	330K	6.5%	▲3%	
Kaikoura	30K	6.3%	▼-7%	315K	6.2%	▲2%	
Timaru	29K	6.2%	▲16%	315K	6.2%	▲5%	
Hurunui	24K	5.1%	▲0%	284K	5.6%	▼-2%	



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	173K	42.0%	▲14%	1.6M	45.4%	▲14%	
West Coast	94K	22.9%	▼-2%	727K	21.1%	▲9%	
Mackenzie	47K	11.5%	▲12%	419K	12.2%	▲11%	
Kaikoura	29K	7.0%	▲12%	210K	6.1%	▲9%	
Marlborough	28K	6.7%	▲5%	192K	5.6%	▲5%	
Waitaki	22K	5.3%	▲14%	182K	5.3%	▲20%	
Timaru	10K	2.3%	▲14%	78K	2.3%	▲8%	
Hurunui	9K	2.2%	▲14%	70K	2.0%	▼-1%	

Accommodation by Type

Venture Timaru - March 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.



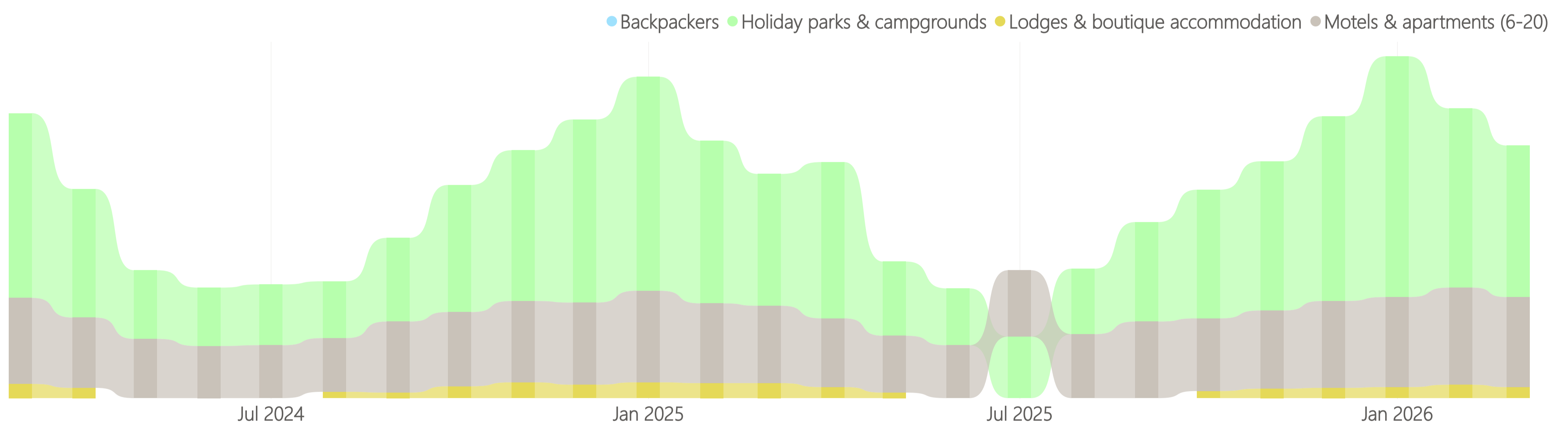
Holiday Parks & Campgrounds and Motels & Apartments (6-20) are increasingly serving different visitor segments. Holiday Parks (49% share of guest nights) grew on the back of domestic demand (▲+20% YoY domestic guest nights) while international guest nights in the same category held essentially flat (▲+2% YoY). Motels & Apartments (6-20) (29% share) showed the opposite pattern: international guest nights surged (▲+35% YoY) while domestic guest nights grew more moderately (▲+12% 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	13,400	64.7%	▲21%	19,200	59.6%	▲15%	1.4	▼-5%	17,600	▼-17%	0.51	↑14%pt.
Motels & apartments (6-20)	6,500	31.4%	▲27%	11,500	35.7%	▲16%	1.8	▼-9%	8,200	▲8%	0.82	↑7%pt.
Lodges & boutique accommodation	800	3.9%	▼-27%	1,500	4.7%	▼-21%	1.8	▲1%	1,300	▼-28%	0.60	↑5%pt.
Backpackers	0	0.0%	-	0	0.0%	-	-	-	0	-	-	-
Hotels	-	-	-	-	-	-	-	-	-	-	-	-
Motels & apartments (>20)	-	-	-	-	-	-	-	-	-	-	-	-
Total	24,200		▲20%	39,000		▲16%	1.6	▼-3%	32,800	▼-8%	0.65	↑14%pt.

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	14,400	59.3%	▲20%	4,800	60.8%	▲2%	19,200	59.6%	▲15%
Motels & apartments (6-20)	9,200	37.9%	▲12%	2,300	29.1%	▲35%	11,500	35.7%	▲16%
Lodges & boutique accommodation	700	2.9%	▼-22%	800	10.1%	▼-20%	1,500	4.7%	▼-21%
Backpackers	0	0.0%	-	0	0.0%	-	0	0.0%	-
Hotels	-	-	-	-	-	-	-	-	-
Motels & apartments (>20)	-	-	-	-	-	-	-	-	-
Total	29,400		▲16%	9,600		▲14%	39,000		▲16%

Accommodation by Type

Venture Timaru - March 2026

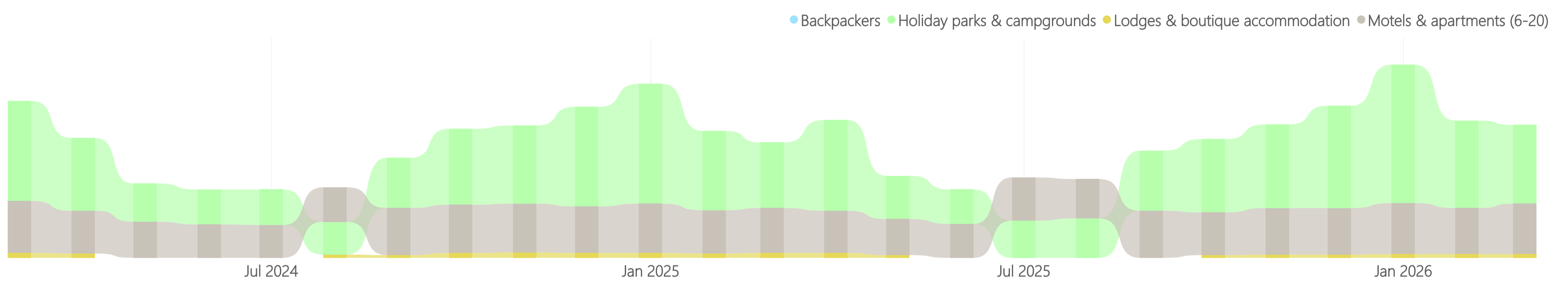
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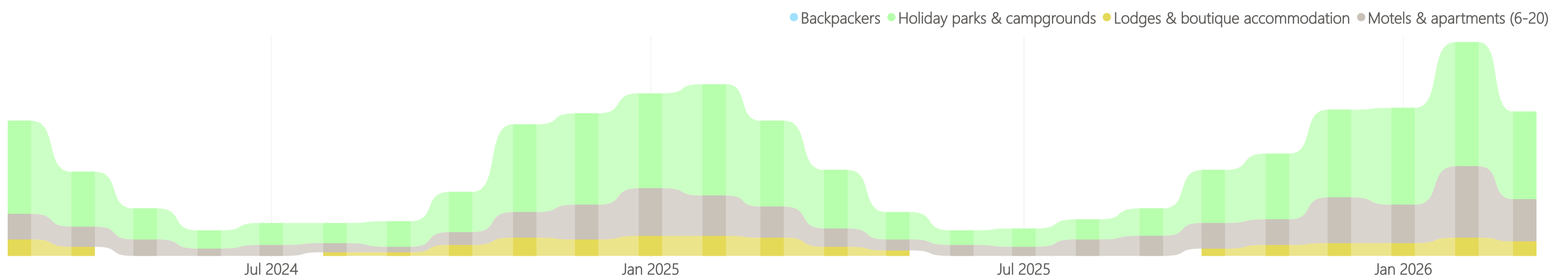
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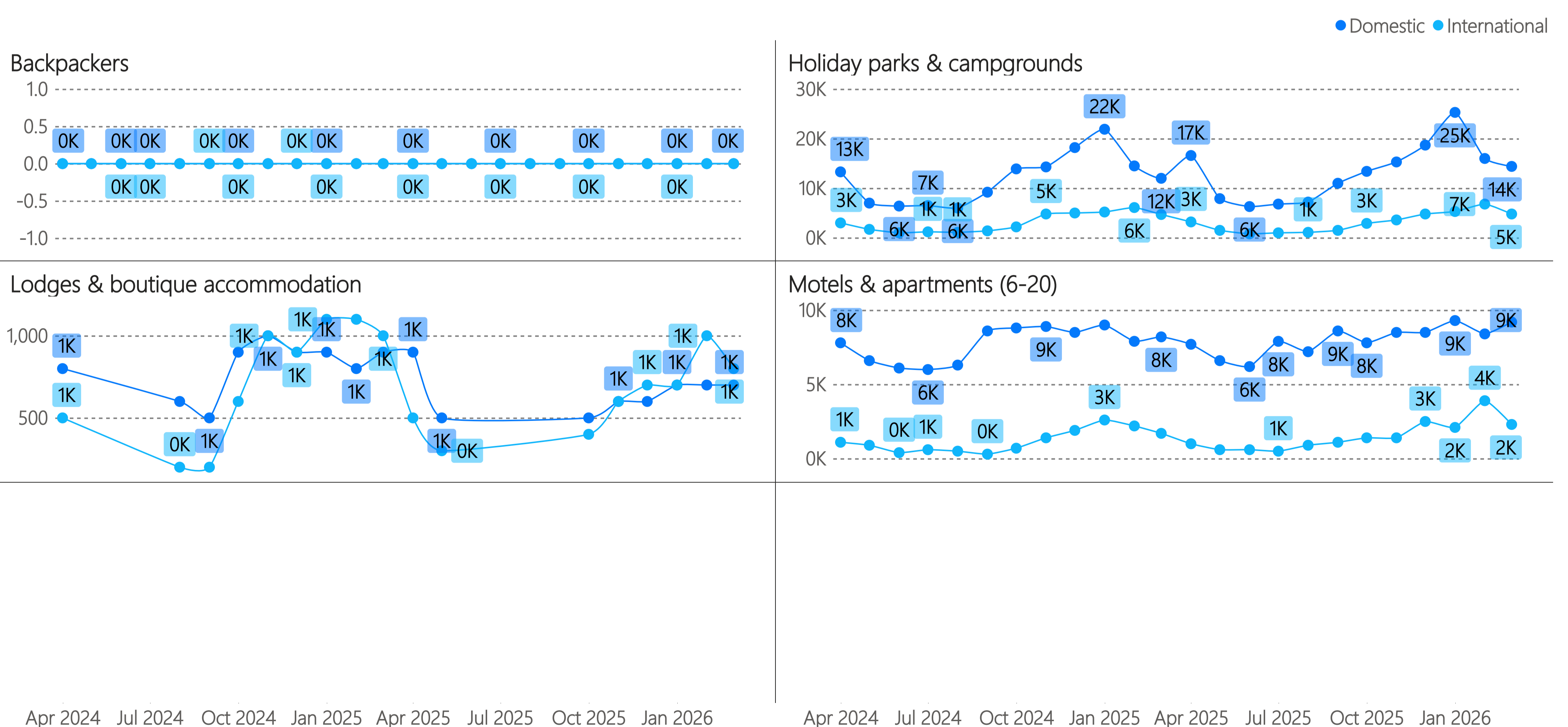
Domestic Guest Nights — Ranked by Accommodation Type



International Guest Nights — Ranked by Accommodation Type



Guest Nights — Trends by Market



Employment Overview

Economic Indicator Data by Industry for March 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.



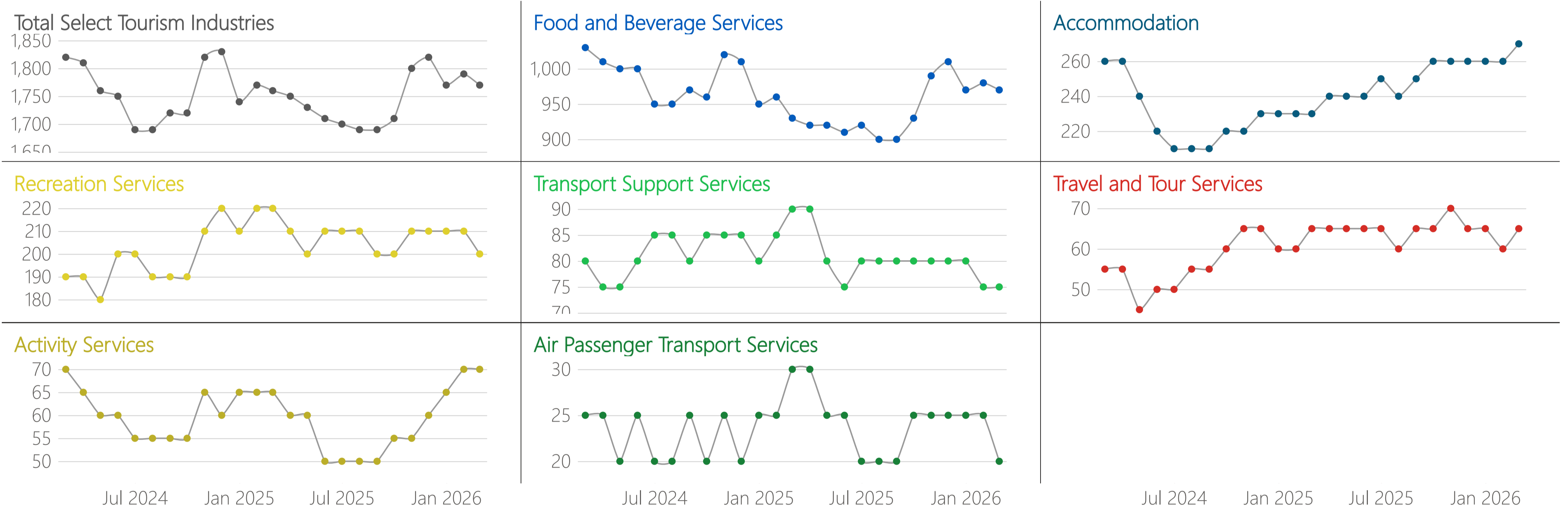
Timaru's tourism workforce held steady on jobs in line with the national benchmark. Filled jobs in hospitality grew: Food & Beverage Services (55% of filled jobs) grew jobs (▲+4% YoY) and Accommodation (15% of filled jobs) jumped (▲+17% YoY jobs). Meanwhile the mobility sectors pulled in the opposite direction: Transport Services contracted (▼-23% YoY jobs) and Transport Support Services also shed positions (▼-17% YoY jobs), a pattern that may partly reflect the fuel crisis.



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	1,770		▲1%	\$6.805M		▲14%
Food and Beverage Services	970	54.8%	▲4%	\$3.191M	46.9%	▲17%
Accommodation	270	15.3%	▲17%	\$0.893M	13.1%	▲54%
Recreation Services	200	11.3%	▼-9%	\$0.763M	11.2%	▲1%
Transport Services	100	5.6%	▼-23%	\$0.447M	6.6%	▼0%
Transport Support Services	75	4.2%	▼-17%	\$0.514M	7.6%	▼-2%
Activity Services	70	4.0%	▲8%	\$0.349M	5.1%	▲5%
Travel and Tour Services	65	3.7%	▲0%	\$0.43M	6.3%	▲4%
Air Passenger Transport Services	20	1.1%	▼-33%	\$0.218M	3.2%	▲6%
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	29,110	73.6%	▲3%		74.1%	▲2%
Marlborough	3,270	8.3%	▲3%		8.0%	▲1%
West Coast	2,240	5.7%	▼0%		5.6%	▲0%
Timaru	1,770	4.5%	▲1%		4.6%	▼-1%
Waitaki	1,130	2.9%	▲12%		2.7%	▲8%
Hurunui	880	2.2%	▲5%		2.2%	▲2%
Mackenzie	710	1.8%	▲4%		1.8%	▼-1%
Kaikoura	430	1.1%	▲8%		1.0%	▲1%

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	\$138M	75.5%	▲10%	\$1.6B	76.9%	▲4%
Marlborough	\$13.8M	7.6%	▲12%	\$149M	7.1%	▲0%
West Coast	\$10.0M	5.5%	▲7%	\$106M	5.1%	▲3%
Timaru	\$6.8M	3.7%	▲14%	\$77.2M	3.7%	▲7%
Waitaki	\$4.5M	2.5%	▲30%	\$43.9M	2.1%	▲12%
Hurunui	\$4.0M	2.2%	▲13%	\$43.5M	2.1%	▲5%
Mackenzie	\$3.9M	2.1%	▲23%	\$41.3M	2.0%	▲5%
Kaikoura	\$1.9M	1.0%	▲12%	\$19.4M	0.9%	▲4%

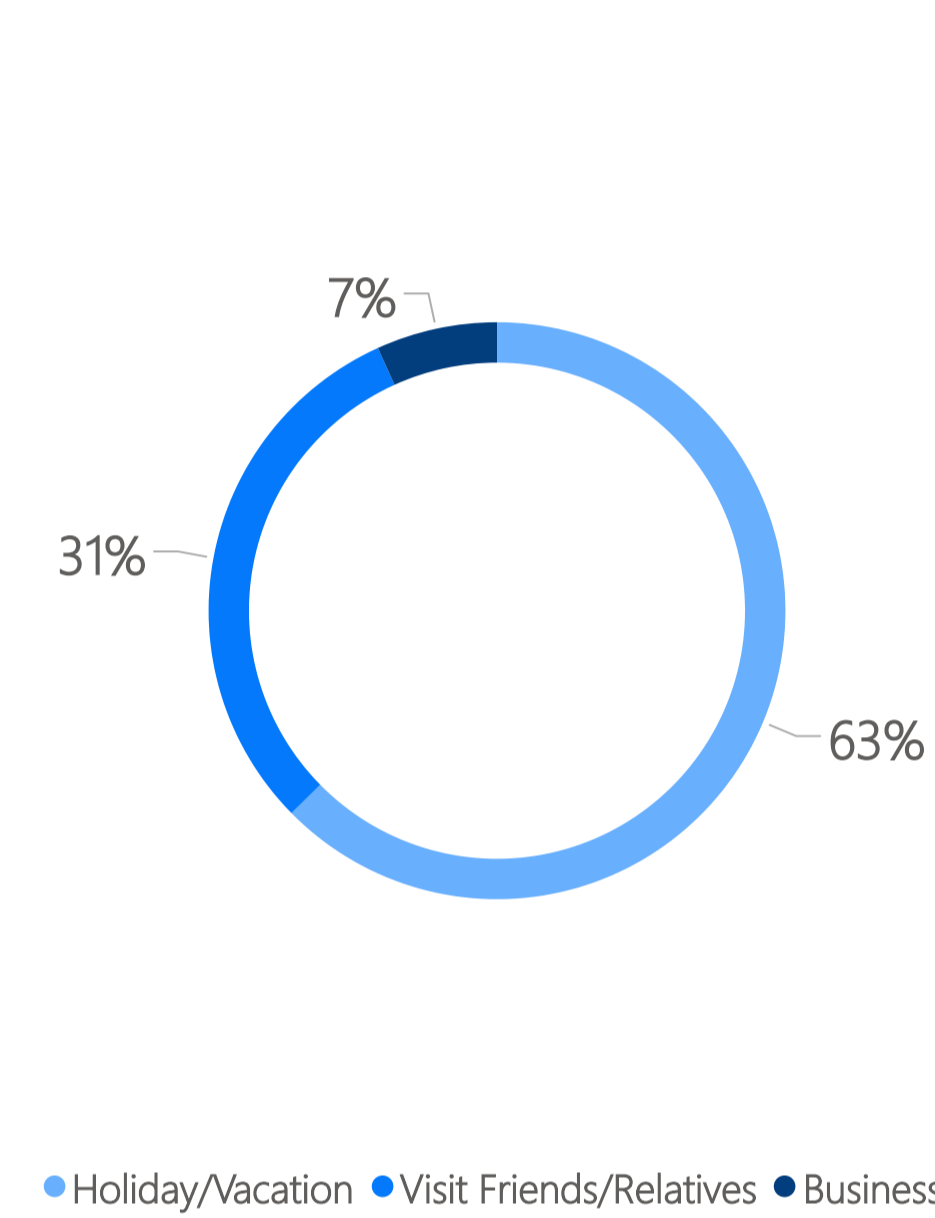
Visitor Arrivals

Venture Timaru - March 2026

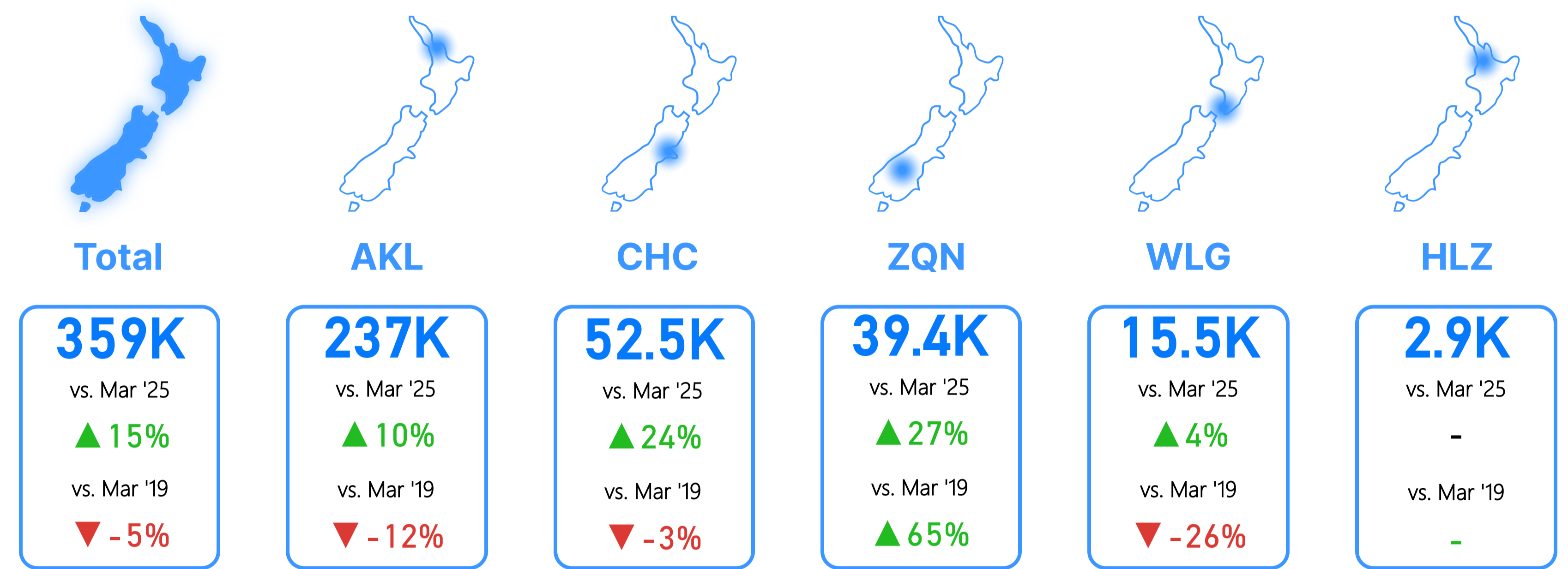
Visitor Arrivals data tracks individuals entering New Zealand who reside overseas and plan to stay for under a year. This includes those coming for temporary work or short-term education. Cruise ship passengers, typically classified as in-transit, are usually excluded from these statistics.

Month at a Glance

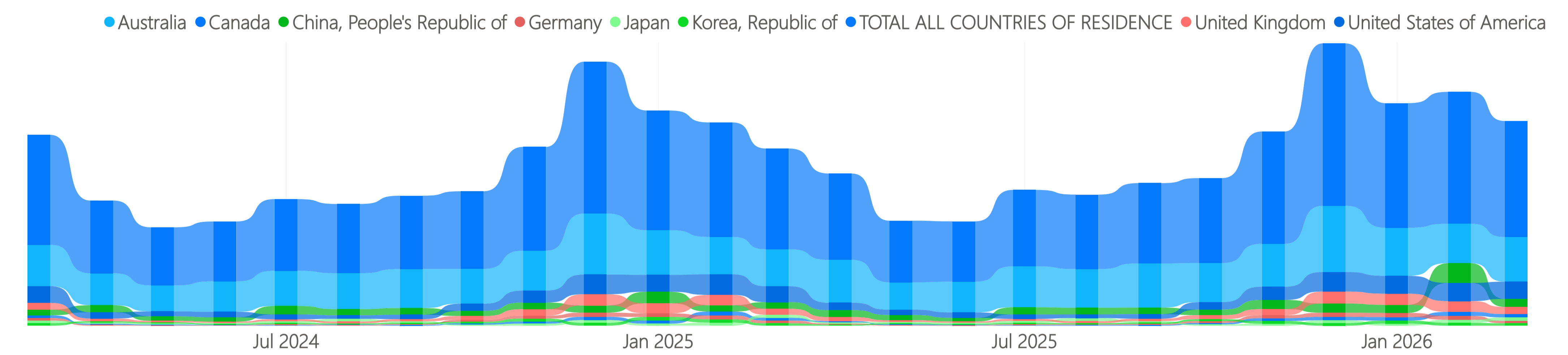
Arrivals by Travel Purpose



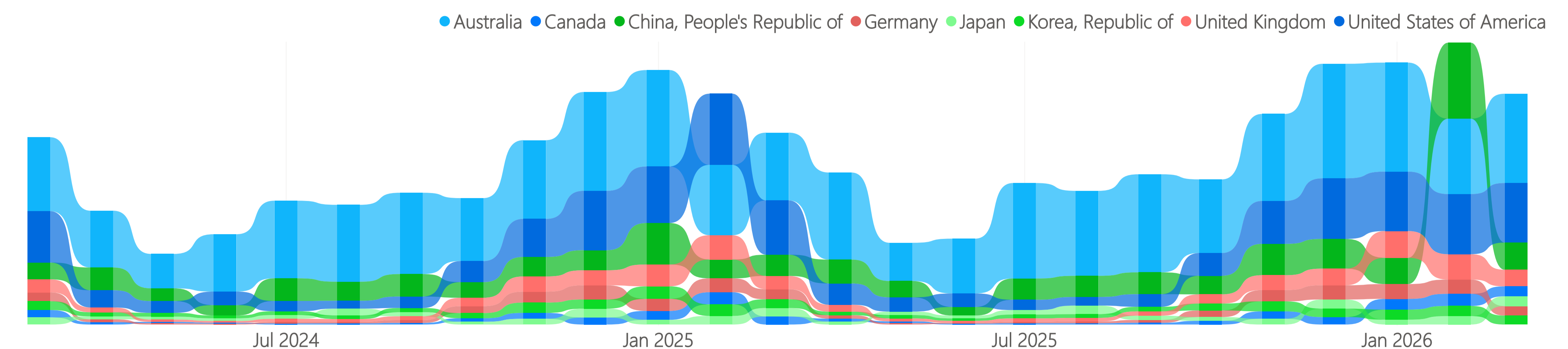
International Visitor Arrivals by Port



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](#).

Monthly Regional Tourism Estimates (MRTes)

MRTe spend data represents modelled estimates of total visitor spending. Developed by [Marketview](#) and published by [MBIE](#), this revised series replaces the interim TECT series. It combines electronic card transaction data from major payment networks with official statistics, including the Retail Trade Survey and Tourism Satellite Account, to produce comprehensive monthly estimates of visitor expenditure by region, visitor type, and industry.

Measures: Tracks Total Visitor Spend, including cash, pre-purchases, and other non-card payments, further segmented by product (industry categories) and origin (visitor's home location).

Technical Notes: **Domestic spend** is defined by the 40km Rule (purchases made 40km+ from the visitor's home Territorial Authority). Data is provided down to the TA level. **International Spend:** Excludes transactions from international cards that have been active in New Zealand for more than 12 months (365 days) to ensure long-term residents are not misclassified as short-term tourists.

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.