NZ Outlook - Projections

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

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

Source: MBIE (Interactive webtool)
NZ Outlook - Projections

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

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

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

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

Source: MBIE (Interactive webtool)
Visitor Strategy

Visitation drives a range of benefits that are difficult to measure including:

- Energy, excitement, confidence and pride.
- Opportunities to make deals, exchange knowledge and expand networks.
- The likelihood that some visitors will choose to relocate their talents and capital to Christchurch.

Visitor Arrivals

Visitor Arrivals - Christchurch Airport

Source: StatisticsNZ (Infoshare)
Visitor Arrivals
- Country

Christchurch Airport - Visitor Arrivals by country of residence

Source: MBIE (Interactive webtool)
Visitor Arrivals - Country

Visitor Arrivals by country of residence (YE April)

Source: StatisticsNZ (Infoshare)
Proportion of Visitors in Christchurch

Visitor Numbers

Source: StatisticsNZ (Infoshare)
Visitor Projections

Visitor Arrivals Forecast (YE April) - Christchurch Airport

Source: StatisticsNZ (Infoshare)
CHRISTCHURCH AIRPORT REVIEW

- Christchurch visitor arrivals have surpassed the pre-quake levels of 513,239 in 2009, reaching 553,479 in the year to April 2019.

- Over the last 5 years the number of visitor arrivals has been growing on average by 5.8% per year.

- Consistently, the majority of international visitors come to Christchurch for the purpose of a holiday/vacation.

- The greatest proportion of international visitors that pass through Christchurch Airport are from Australia (47%) followed by China (10%) and then the United Kingdom (7%).

- Chinese Visitors are the fastest growing visitor market, growing 500% since 2013.
Christchurch - Guest Nights

<table>
<thead>
<tr>
<th>Year</th>
<th>Guest Nights (Domestic)</th>
<th>Guest Nights (International)</th>
</tr>
</thead>
<tbody>
<tr>
<td>2009</td>
<td>1,700,000</td>
<td>1,550,000</td>
</tr>
<tr>
<td>2010</td>
<td>1,750,000</td>
<td>1,600,000</td>
</tr>
<tr>
<td>2011</td>
<td>1,600,000</td>
<td>1,500,000</td>
</tr>
<tr>
<td>2012</td>
<td>1,400,000</td>
<td>1,300,000</td>
</tr>
<tr>
<td>2013</td>
<td>1,200,000</td>
<td>1,100,000</td>
</tr>
<tr>
<td>2014</td>
<td>1,100,000</td>
<td>1,000,000</td>
</tr>
<tr>
<td>2015</td>
<td>1,000,000</td>
<td>900,000</td>
</tr>
<tr>
<td>2016</td>
<td>900,000</td>
<td>800,000</td>
</tr>
<tr>
<td>2017</td>
<td>800,000</td>
<td>700,000</td>
</tr>
<tr>
<td>2018</td>
<td>700,000</td>
<td>600,000</td>
</tr>
<tr>
<td>2019</td>
<td>600,000</td>
<td>500,000</td>
</tr>
</tbody>
</table>

Source: StatisticsNZ (Infoshare)
Christchurch -
Guest Nights incl.
AirBnB

Source: StatisticsNZ (Infoshare), AirDNA
Christchurch - Guest Nights
Four Avenues

Hotel Guest Nights - Four Avenues (YE April)

Source: StatisticsNZ (Infoshare), CCC
Christchurch - Capacity and Occupancy

Christchurch City Occupancy, monthly (stay-unit-nights used)

Christchurch City Capacity, monthly (stay-unit-nights available)

Source: StatisticsNZ (Infoshare)
Christchurch - Hotel Capacity Projection

Hotel room capacity in Christchurch CBD

Source: StatisticsNZ (Infoshare)
Christchurch - Domestic Projection

Domestic Guest Nights Projection - Christchurch City (YE April)

Source: StatisticsNZ (Infoshare)
Christchurch - International Projection

International Guest Nights Projection - Christchurch City (YE April)

Source: StatisticsNZ (Infoshare)
Four Avenues Guest Nights - Total Trend

Demand Projected Guest Nights - Four Avenues Christchurch 2019 - 2022

Source: StatisticsNZ (Infoshare)
CHRISTCHURCH CITY REVIEW

- Following the earthquakes, Christchurch’s guest capacity fell by 40%. The continued rebuild effort has seen several major accommodation units re-open, however, current capacity remains around 89% of pre-quake.

- International guest nights were the most affected following the quakes. Since then, they have made a steady recovery of 10% per year on average since 2014.

- The rise of AirBnB’s popularity has seen guest nights in the city bounce back to pre-quake levels after these have been accounted for.
CHRISTCHURCH NZ

Includes: Christchurch City, Waimakariri, Selwyn, Ashburton
Christchurch

Total Spend Profile of Products in ChristchurchNZ RTO
YE May 2019

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

ChristchurchNZ RTO Total Spending by Domestic/International
YE May 2019

- Domestic: $1,920.92 (3.4% YTY Growth)
- International: $1,196.40 (6.7% YTY Growth)

Source: MBIE (Interactive webtool)
ChristchurchNZ - Visitor Spending

Source: MBIE (Interactive webtool)
ChristchurchNZ - International Visitor Spending

International visitor spending by product - ChristchurchNZ (YE May)

Source: MBIE (Interactivewebtool)
ChristchurchNZ - International Visitor Spending

Source: MBIE (Interactive webtool)
ChristchurchNZ - Visitor Spending Projection

Visitor Spending Projection - ChristchurchNZ (YE May)
Source: MBIE, ChristchurchNZ

Source: MBIE (Interactive webtool)
ChristchurchNZ - Spending vs Arrivals

Visitor Arrivals vs Visitor Spending - 2019 vs 2018

Source: MBIE (Interactive webtool), StatisticsNZ (Infoshare)
Tourism Fact Book

ChristchurchNZ - Spending vs Arrivals

Visitor Arrivals vs Visitor Spending - 2019 vs 2012

Source: MBIE (Interactivewebtool), StatisticsNZ (Infoshare)
CHRISTCHURCHNZ RTO REVIEW

- When considering domestic visitor spending by product, the greatest growth between 2015 and 2019 was seen in the following categories; other tourism products (71.7%), other passenger transport (29.4%), food and beverage serving services (24.9%), retail sales - other (28.3%).

- When considering international visitor spend by product the greatest growth between 2015 and 2019 was seen in the following categories; Cultural, recreational and gambling services (57.4%), Food and beverage services (57%), Other tourism services (57.6%) and Retail sales - other (69.3%). Accommodation services have also recovered by 50.5% since 2015.

- Chinese visitor spending grew the most between 2015 and 2019 seeing an increase of 96.1%.
CANTERBURY

Includes: Christchurch City, Hurunui, Waimakariri, Selwyn, Ashburton, Timaru, Mackenzie, Waimate, Waitaki, Kaikoura.
Canterbury Tourism Fact Book

Source: MBIE (Interactive webtool)

Canterbury Total Spending by Domestic/International YE May 2019

Domestic: 60% International: 40%

Total Spend Profile of Products in Canterbury YE May 2019

<table>
<thead>
<tr>
<th>Category</th>
<th>YE May 2019 Spend</th>
<th>YTY Growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Domestic</td>
<td>$2,400m</td>
<td>3.5%</td>
</tr>
<tr>
<td>International</td>
<td>$1,568m</td>
<td>7.7%</td>
</tr>
</tbody>
</table>

Canterbury Total Spending by Domestic/International YE May 2019

Domestic: 60% International: 40%
Canterbury - Visitor Spending

Visitor Spending - Canterbury (YE May)

Source: MBIE (Interactive webtool)
Canterbury - Domestic Visitor Spending

Domestic visitor spend by product - Canterbury (YEO May)

Source: MBIE (Interactive webtool)
Canterbury - International Visitor Spending

International visitor spending by country - Canterbury (YE May)

Source: MBIE (Interactivewebtool)
Canterbury - Guest Nights

Source: StatisticsNZ (Infoshare)
Canterbury - Guest Nights

Guest Nights by accommodation type - Canterbury (YE April)

Source: StatisticsNZ (Infoshare)
Canterbury - Occupancy vs Capacity

Source: StatisticsNZ (Infoshare)
Domestic Guest Nights Projection - Canterbury (YE April)

Source: StatisticsNZ (Infoshare)
Canterbury - International Projection

International Guest Nights Projection - Canterbury (YE April)

Source: StatisticsNZ (Infoshare)
CANTERBURY REVIEW

- In Canterbury, the greatest proportion of spend for the year ending May 2019 within the domestic visitor marker was on Retail Sales - Other (29.2%), followed by other passenger transport (16.8%).

- International visitor spending has increased by 60% since 2011, increasing to $1.57b for the year ended May 2019.

- Like in the ChristchurchNZ RTO, international guest nights were the most affected following the 2010/11 earthquakes. Over the last 5 years the number of guest nights have been growing on average 9.83% per year.
Cruise Ship Survey

Source: StatisticsNZ, CCC
Cruise Ship Survey

Cruise ship Expenditure - Canterbury (YE Jun)

Expenditure ($m)

- 2015
- 2016
- 2017
- 2018

Source: StatisticsNZ, CCC
VISITOR
ATTRACTIONS

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