

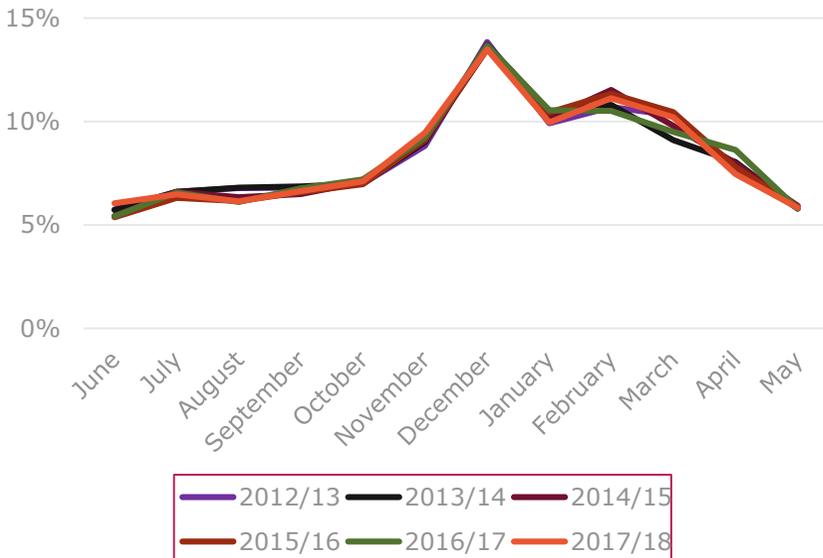
INSIGHT AT A GLANCE – Seasonality - December 2018

An overview of seasonality characteristics of the New Zealand tourism industry.

Winter: June, July, August; **Spring:** September, October, November; **Summer:** December, January, February; **Autumn:** March, April, May.

■ Winter ■ Spring ■ Summer ■ Autumn

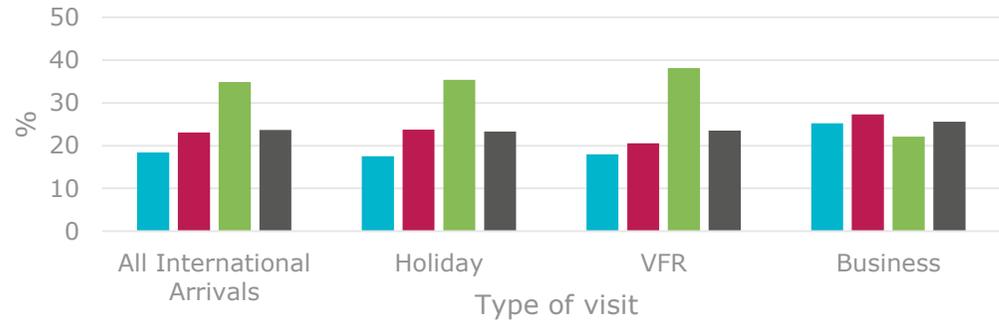
Figure 1: International Visitor Arrivals



The seasonality patterns of the New Zealand tourism industry are remarkably fixed. Year after year, the same patterns emerge even in the face of determined efforts by the industry to develop shoulder- and winter-season travel.

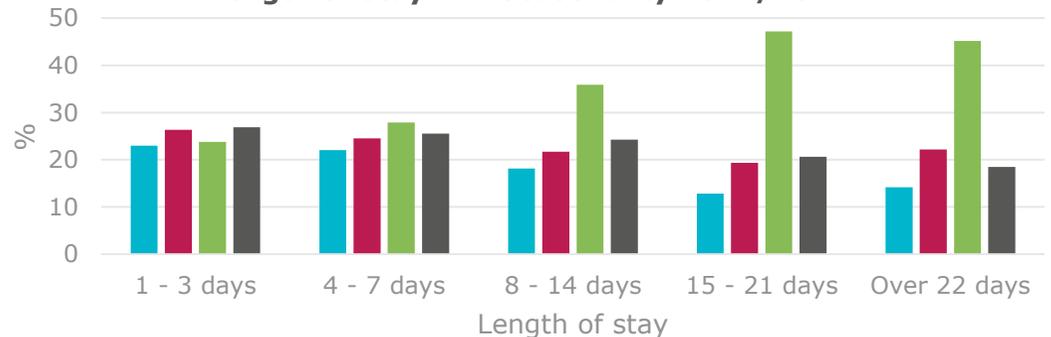
The other graphs contained in this analysis are focussed on one year of data, but for each the same rigid seasonal patterns are observed as in Figure 1.

Figure 2: International Visitor Arrivals - Types of visitor and seasonality 2017/18



The most seasonal traveller group is Visiting Friends and Family (VFR) which typically involved a high level of Christmas and summer holiday break travel. Holiday visitors are slightly less seasonal, with arrivals peaking after the Christmas period and into February. Business travel is well spread throughout the year.

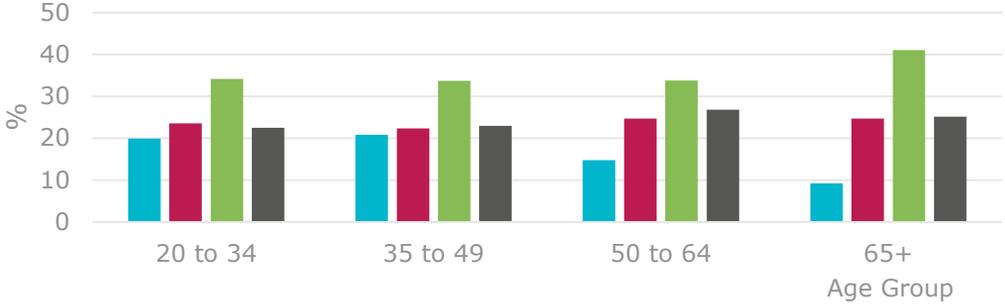
Figure 3: International Visitor Arrivals - Length of Stay and Seasonality 2017/18



There is a clear seasonality difference between short stay international visitors and those who stay longer. This pattern heightens the effective seasonality because those visitors who stay longest in New Zealand are the most likely to arrive in the peak summer season. As such, strategies to attract high value longer stay visitors may actually worsen seasonality patterns.

Source: International Visitor Arrivals, Stats NZ

Figure 4: International Visitor Arrivals - Age and Seasonality 2017/18



Younger international visitors are less seasonal than older arrivals. In general, older visitors are more likely to arrive in summer. Notably winter arrivals fall as the age of the travellers increases, with just 9% of visitors aged 65 and over arriving over the winter months.

Figure 5: International Guest Nights -Seasonal Patterns 2017/18



All commercial accommodation* types are most utilised by international visitors over the summer, with Holiday Parks the most seasonal, recording 43% of annual guest nights over the summer season. Hotels are less seasonal, but still show a clear difference between the winter and summer seasons.

Figure 6: Domestic Guest Nights -Seasonal Patterns 2017/18



The use of Hotels and Motels by domestic travellers is even throughout the year, and is essentially non-seasonal. The strongest seasonality levels arise from domestic guest nights in Holiday Parks, with almost 50% of guest nights over the summer period. This reflects the way New Zealanders typically take their summer holidays.

***Note:** Commercial accommodation measures Hotels, Motels, Holiday Parks and Backpackers, but excludes other forms of accommodation.

Source: International Visitor Arrivals, Stats NZ and the Commercial Accommodation Monitor, Stats NZ