

# New Zealand Hotel Performance Focus

Ski Season and International Arrivals Lift Hotel performance

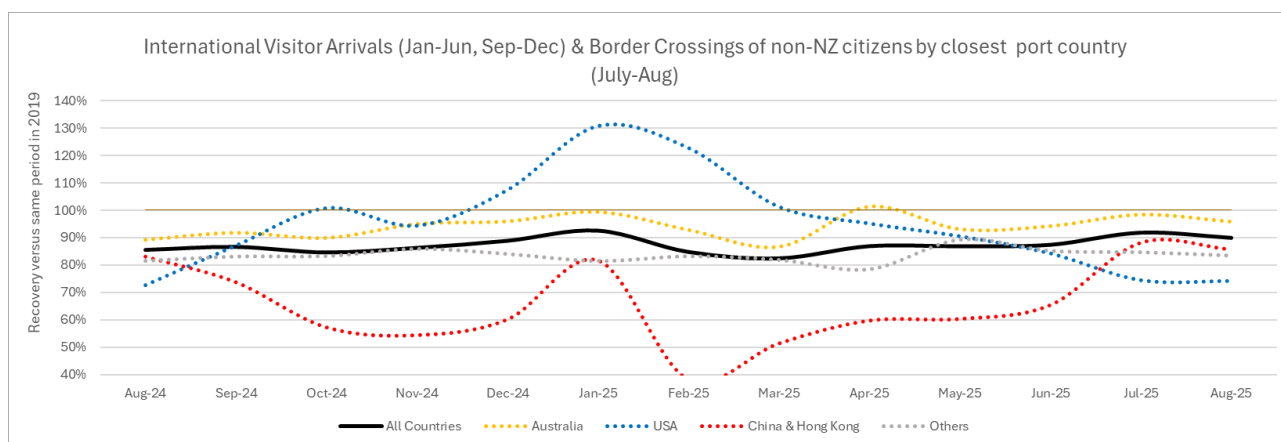
**August 2025**



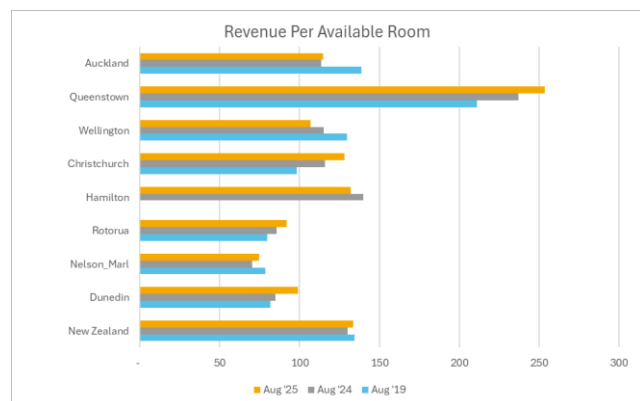
New Zealand's hotel sector gained some momentum in August, recording the first month of nationwide RevPAR growth since April according to Hotel Data New Zealand's (HDNZ) latest reports. Overall results were supported by stronger international arrivals, a solid ski season, and healthier demand in key cities. Performance varied across regions, but the tone was generally more positive than in recent months.

**Border crossing** data from Stats NZ for the month of August showed that arrivals of non-New Zealand citizens rose 5.2% on last year. For the first time in three months, all three of the top source markets, Australia, the United States, and China, recorded growth.

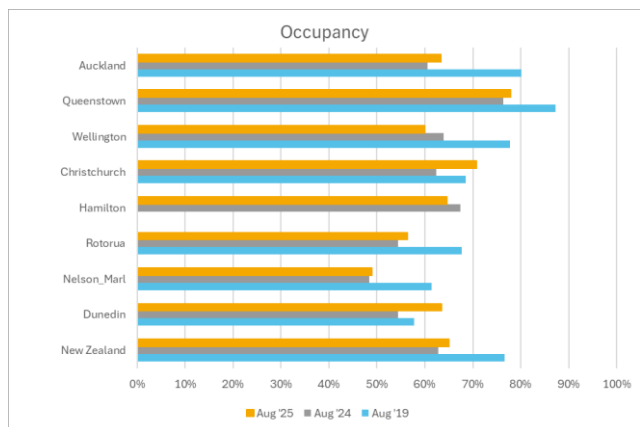
Australia led the way with a 7.4% year-on-year increase, most of which benefitted Christchurch and Queenstown as travellers headed to the ski fields. US arrivals were up 2% and Chinese arrivals up 3%. Even with this improvement, overall arrivals remained around 10% below August 2019 levels. On the other side, New Zealanders travelling overseas grew only 2%, reflecting weak consumer confidence and cautious spending at home.



(Source: Stats NZ)



(Source: HDNZ)



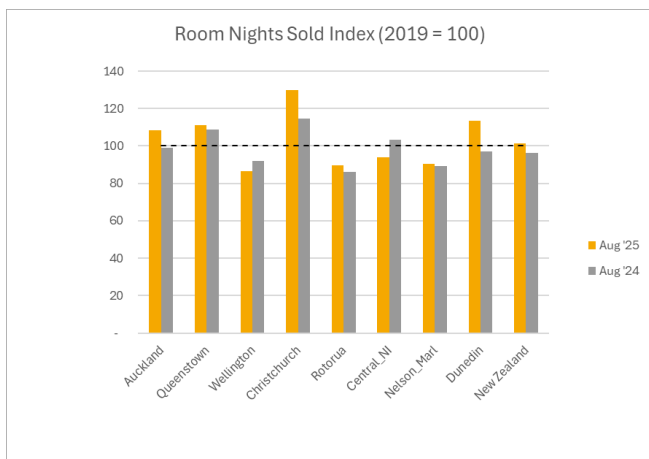
(Source: HDNZ)

**Hotels across the country** reported a 2.8% lift in RevPAR compared with August 2024. This was driven by an estimated 5.3% increase in room nights, with Christchurch and Auckland capturing most of the extra demand.

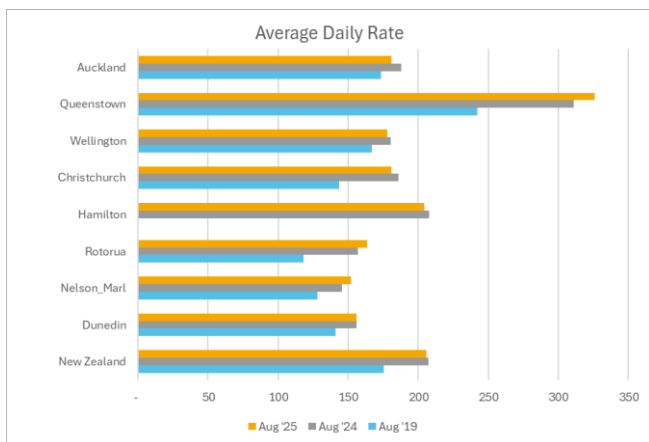
International visitors were a major contributor, with international room nights up 7% compared with last year, while domestic room nights rose 4%, according to HDNZ.

National occupancy hit 63%, the first time this year it has topped the prior year's result. However, average room rates were slightly lower, down 0.7%, showing that hoteliers had little scope to lift prices despite stronger demand.

**Auckland** hotels saw their first RevPAR and occupancy growth since January. Occupancy gains were supported by an estimated 9.6% increase in rooms sold, ahead of a 4.7% increase in supply. Premium hotels performed best, with 5-star properties reaching 67% occupancy.



(Source: HDNZ &amp; Horwath HTL)



(Source: HDNZ)

Events such as the Darts Masters, Disney on Ice, and an international Banksy exhibition brought in visitors, though they did not seem to create the tight demand conditions needed to push rates higher. In fact, ADR fell for the seventh month in a row.

FIT and corporate business grew strongly, up 16%, but conferencing demand slipped by 6%.

**Wellington** recorded a weaker month. RevPAR declined 7.4%, with room nights sold down circa 6% and occupancy settling at 60%. This was despite solid attendance at the annual Beervana event and four multi-day conferences at Tākina, the latter which drew more than 2,100 delegates. Unlike last year, no All Blacks test was played in the city, contributing to softer results.

**Christchurch** was again one of the standout performers. Occupancy reached its highest August level in ten years, lifted by strong Australian arrivals and gatherings at Te Pae. Airline passenger arrivals from Australia rose 18% compared with last year, matching pre-pandemic levels.

Te Pae continues to underpin the city's demand. The venue is reported to host more than 80 events from August to November, generating close to 50,000 hotel guest nights. Despite this strength, average rates in the city remained below last year's levels across both FIT and Meeting & Events segments.

**Queenstown** once again led national performance. Good snow conditions and more flights supported both domestic and international travel. Australian passenger arrivals increased 5.7% to 53,682, helped by extra services from both Australian carriers and Air New Zealand.

With no new hotel supply coming in, occupancy stayed strong and rates kept climbing. For the year to August, ADR grew by 8.1%, keeping Queenstown at the top of the performance table.

**Dunedin** hotels benefited from large multi-day events. The "Big Sing Finale" brought nearly 1,000 student performers and filled hotels for several days, while a major educational conference added further business. Occupancy jumped 10 percentage points year-on-year to 64%, giving the city a strong mid-winter result.

Horwath HTL New Zealand  
PO Box 628  
Shortland Street  
Auckland 1140  
New Zealand

Contact:  
Wim Ruepert  
+64 21 371 653  
wruepert@horwathhtl.com



## About Hotel Council Aotearoa (HCA)

Hotel Council Aotearoa (HCA) is New Zealand's dedicated industry body for hotels and hoteliers. HCA currently represents 255 New Zealand hotels; comprising almost 27,350 guest rooms or 9.98 million available room-nights per annum. Alongside airlines, airports and transport infrastructure, hotels are key tourism infrastructure without which New Zealand would be unable to attract high value international travellers. [www.hotelcouncilaotearoa.com](http://www.hotelcouncilaotearoa.com)

## About Horwath HTL

At Horwath HTL, our focus is one hundred percent on hotel, tourism and leisure consulting. Our services cover every aspect of hotel real estate, tourism and leisure development.

Our clients choose us because we have earned a reputation for impartial advice that will often mean the difference between failure and success. Each project we help is different, so we need all of the experience we have gained over our 100-year history.

We are a global brand with 52 offices in 38 countries, who have successfully carried out over 30,000 assignments for private and public clients. We are part of the Crowe Global network, a top 10 accounting and financial services network. We are the number one choice for companies and financial institutions looking to invest and develop in the industry.

We are Horwath HTL, the global leader in hotel, tourism and leisure consulting.

## Horwath HTL Global Offices

### AFRICA

Rwanda  
South Africa

### ASIA

#### PACIFIC

Australia  
China  
India  
Indonesia  
Japan  
Malaysia  
New Zealand  
Singapore  
Thailand

### EUROPE

Albania  
Andorra  
Austria  
Croatia  
Cyprus  
Germany  
Greece  
Hungary  
Ireland  
Italy  
Netherlands  
Norway  
Poland  
Portugal  
Serbia  
Spain  
Switzerland  
Turkey  
United Kingdom

### LATIN

#### AMERICA

Argentina  
Brazil  
Chile  
Dominican  
Republic  
Mexico

#### MIDDLE

#### EAST

UAE & Oman

### NORTH AMERICA

Atlanta, GA  
Denver, CO  
Los Angeles, CA  
New York, NY  
Oregon, OR  
Orlando, FL  
Scottsdale, AZ  
Montréal, Canada  
Toronto, Canada

[www.horwathhtl.co.nz](http://www.horwathhtl.co.nz)