

Agency Information Sharing - Tourism

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Purpose

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Outline:

- International Tourism Context
- Latest New Zealand Data
- Looking Forward

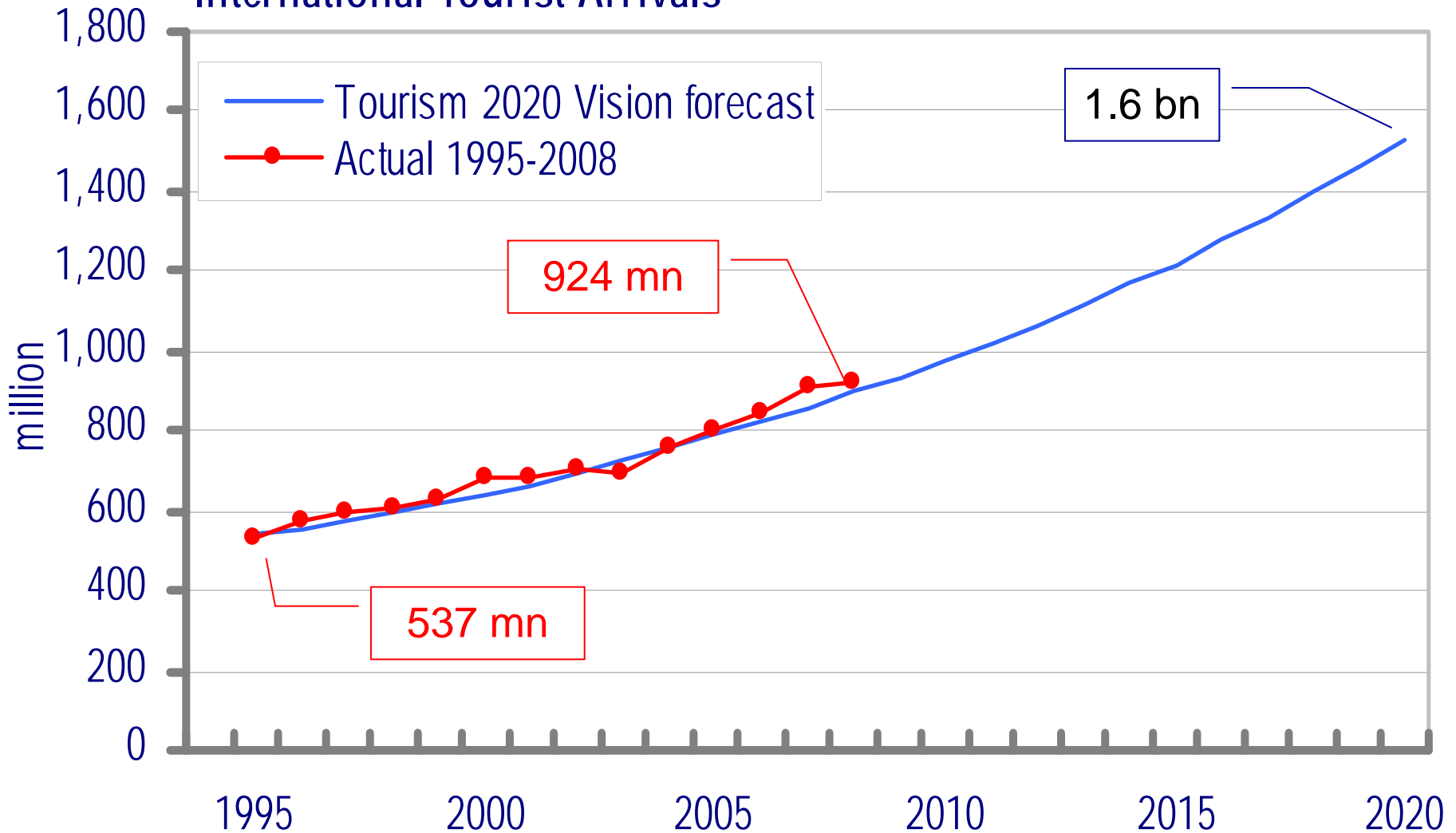
Actual trend vs. *Tourism 2020 Vision* forecast

World

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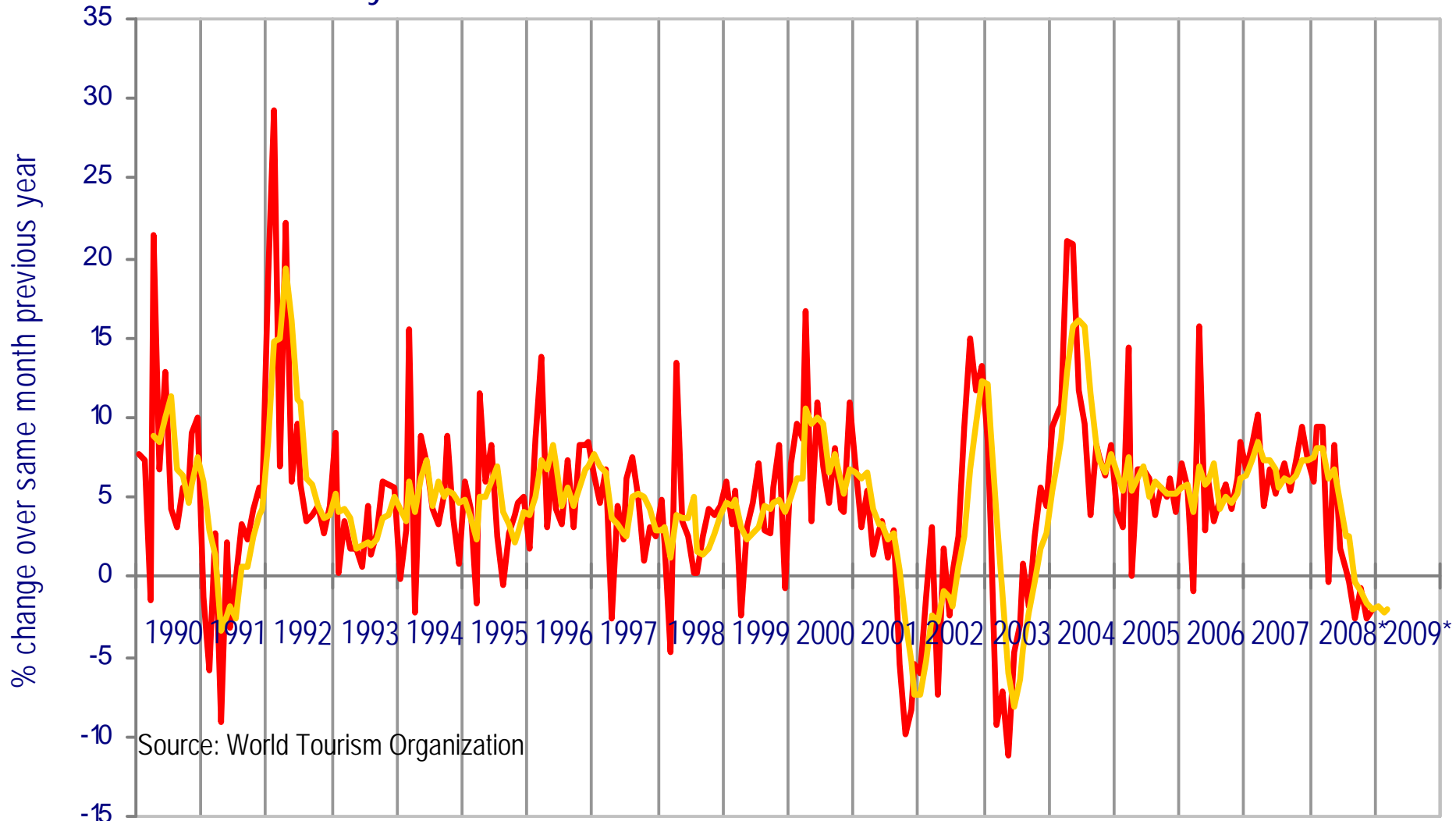


International Tourist Arrivals



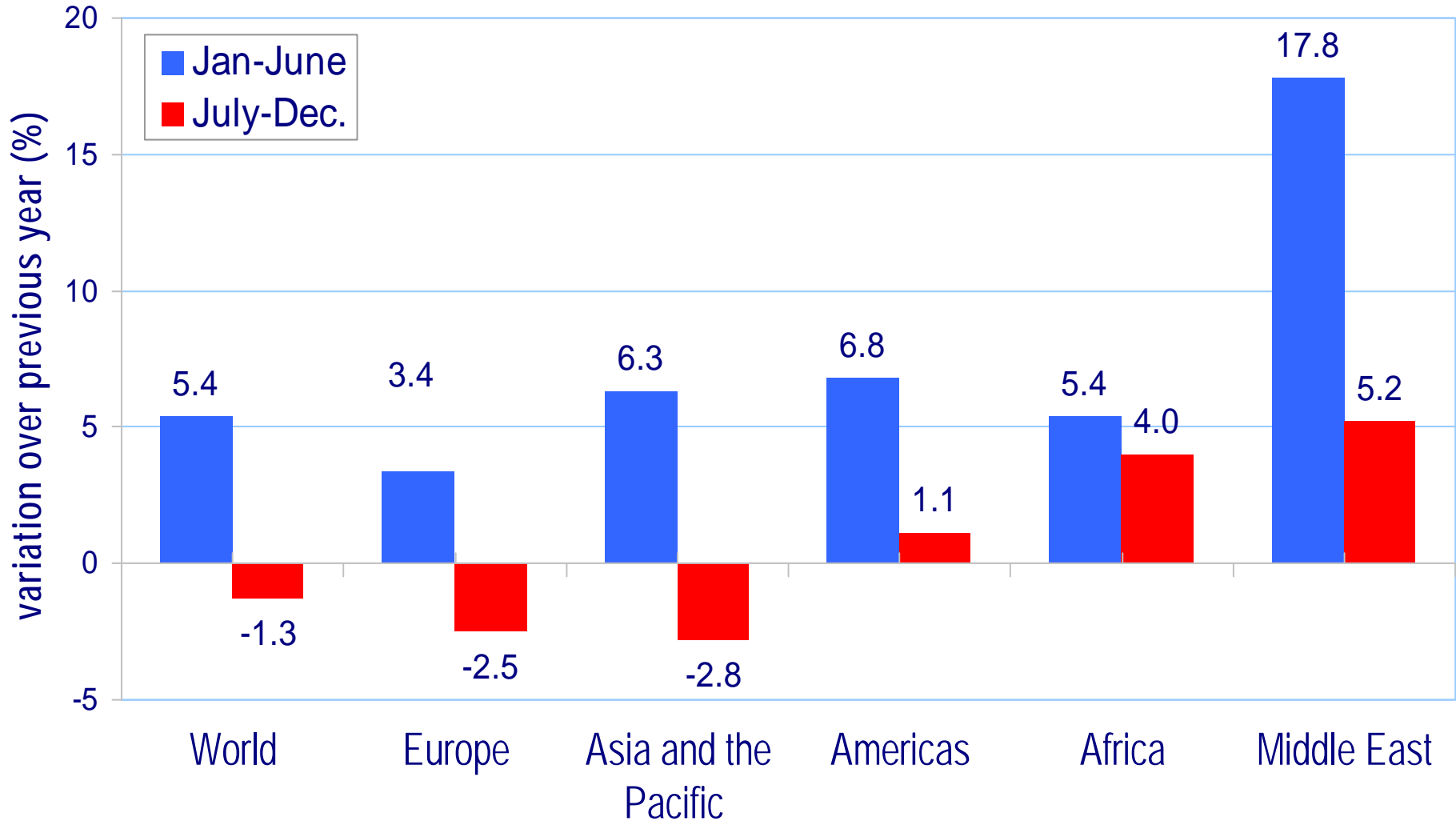


Monthly evolution of worldwide international tourist arrivals





International Tourist Arrivals





So...

- Global tourism slowed significantly over second half of 2008
- Asia/Pacific and Europe hardest hit so far
- Uncertainty around depth and length
- Previous downturns have had bounce-back

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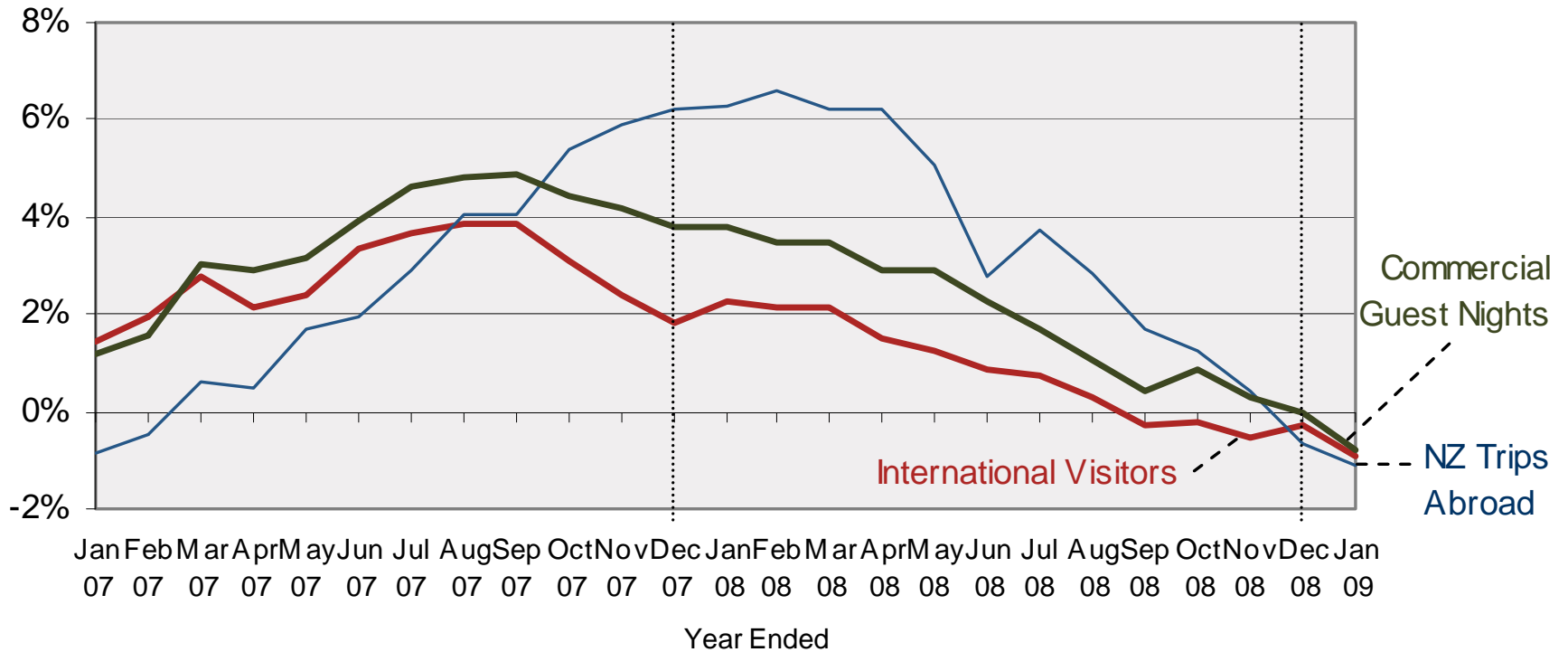


How is New Zealand tourism getting on...



Inbound, Outbound, Domestic and Accommodation Nights

Rolling Annual Growth Rates - Year Ended Jan07-Jan09

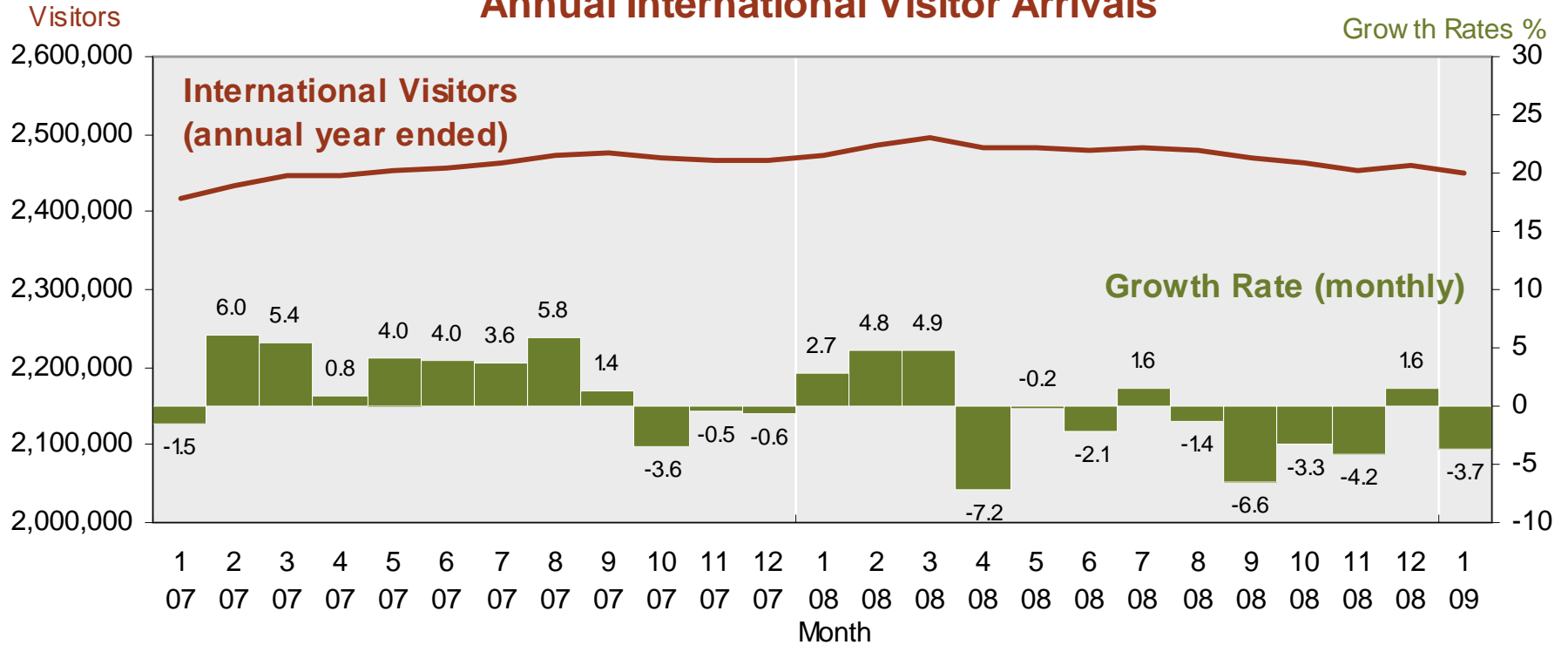


International Visitor Arrivals

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Annual International Visitor Arrivals



NZ Overseas Trips

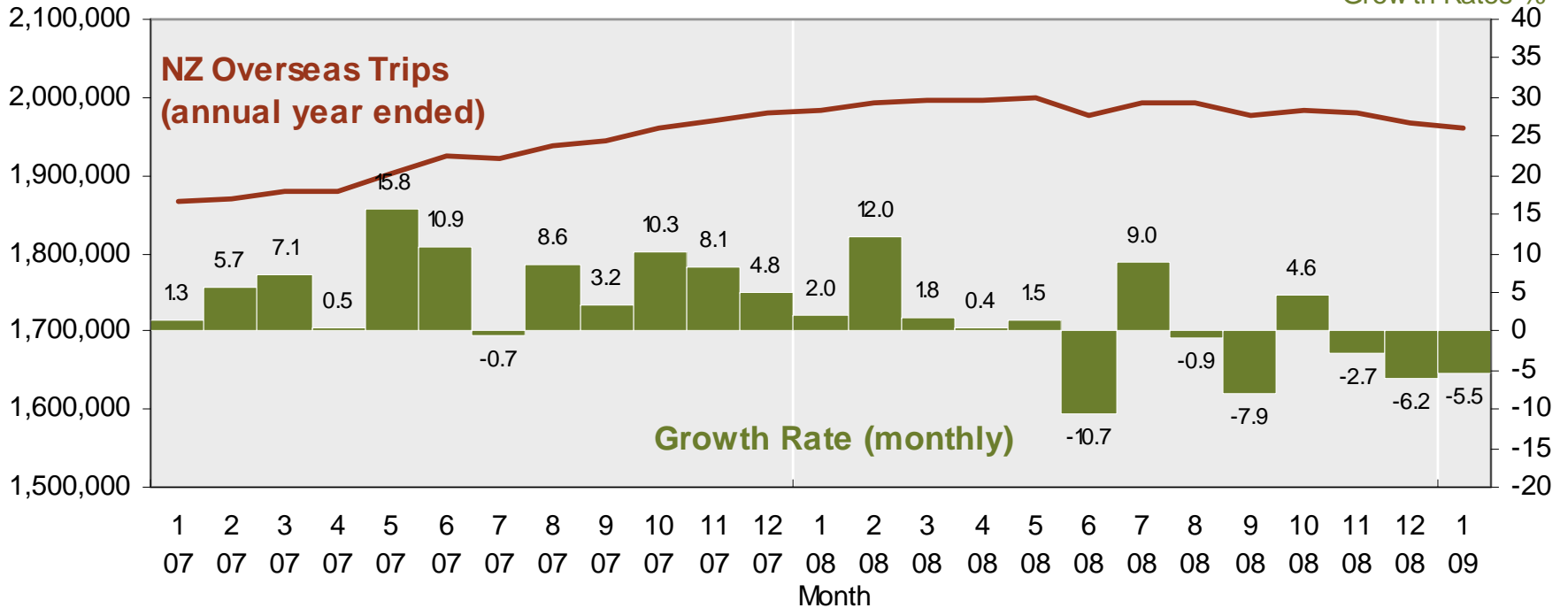
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Annual NZ Outbound Trips

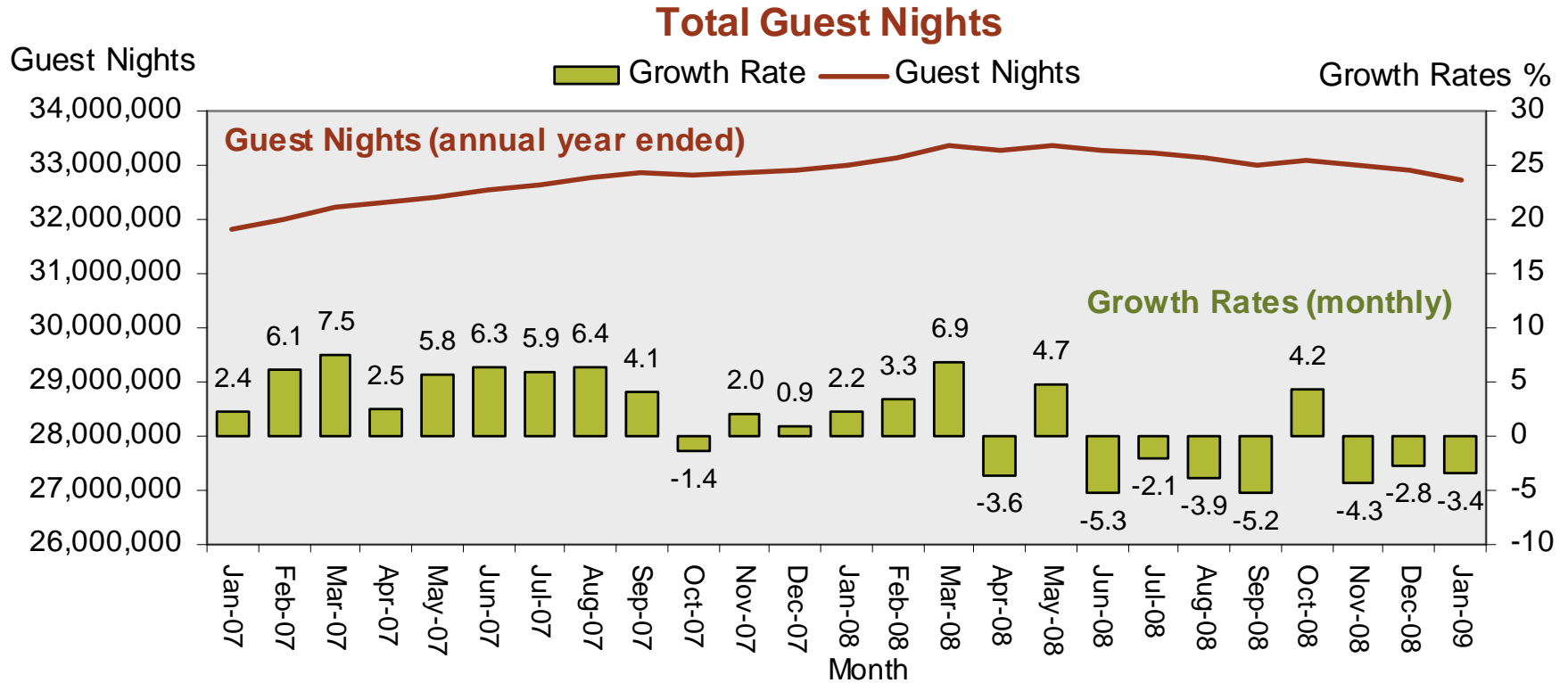
Overseas Trips

Growth Rates %



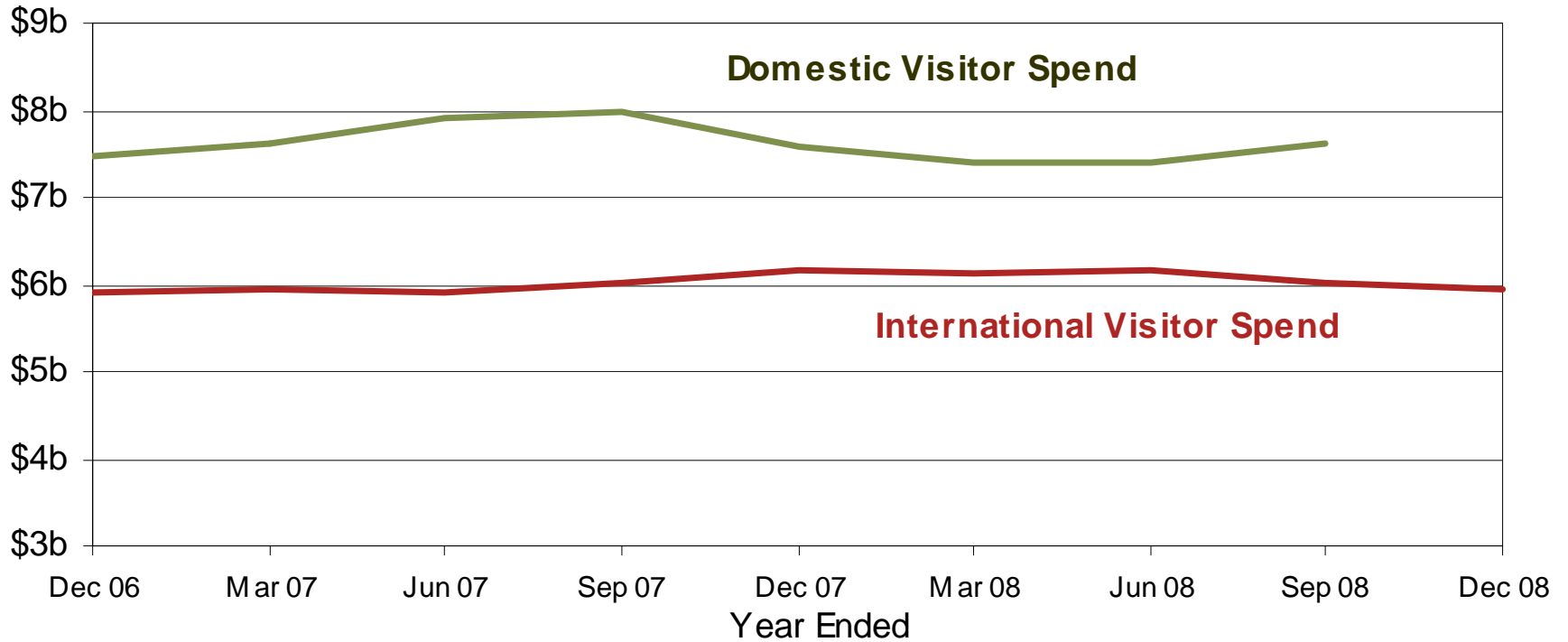
Commercial Guest Nights

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Visitor Expenditure

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www.tourismresearch.govt.nz



Sources: IVS and DTS

Commercial Guest Nights

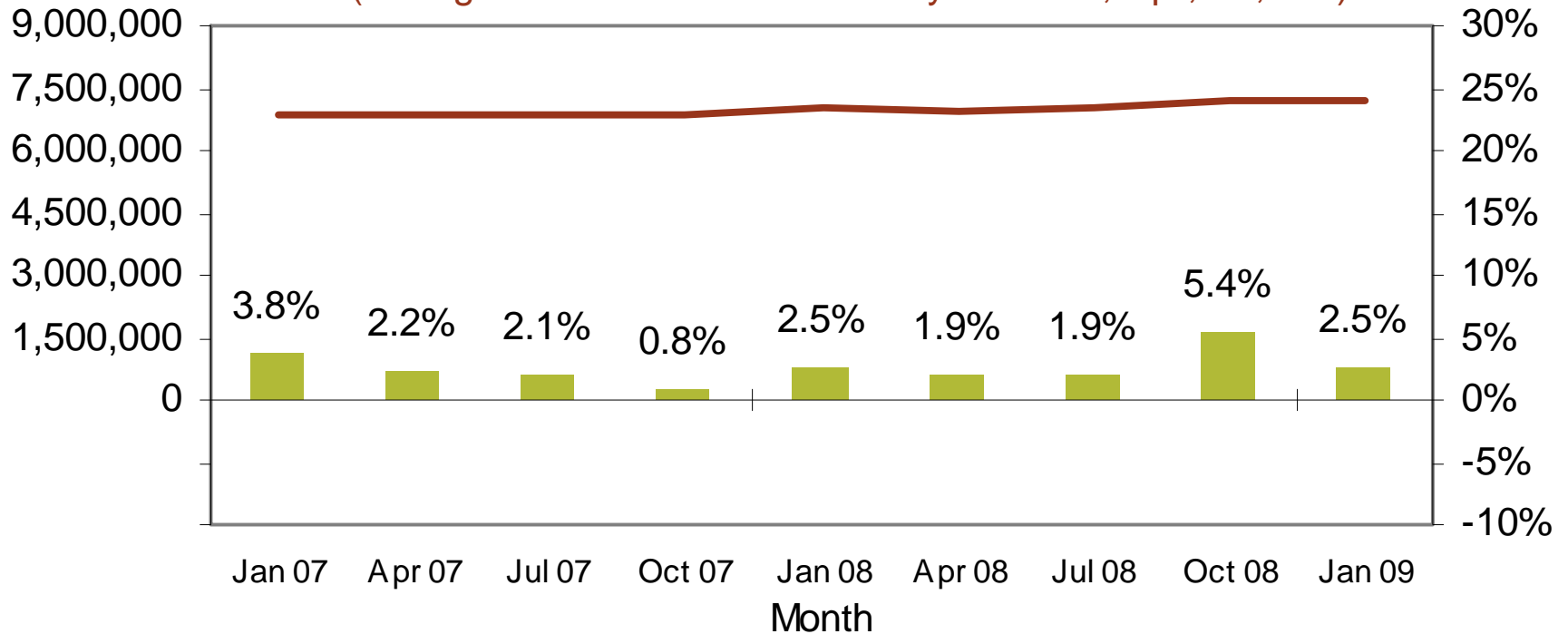
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Domestic Guest Nights

Growth rate

(Rolling totals for 4 months of the year - Jan, Apr, Jul, Oct)



Commercial Guest Nights

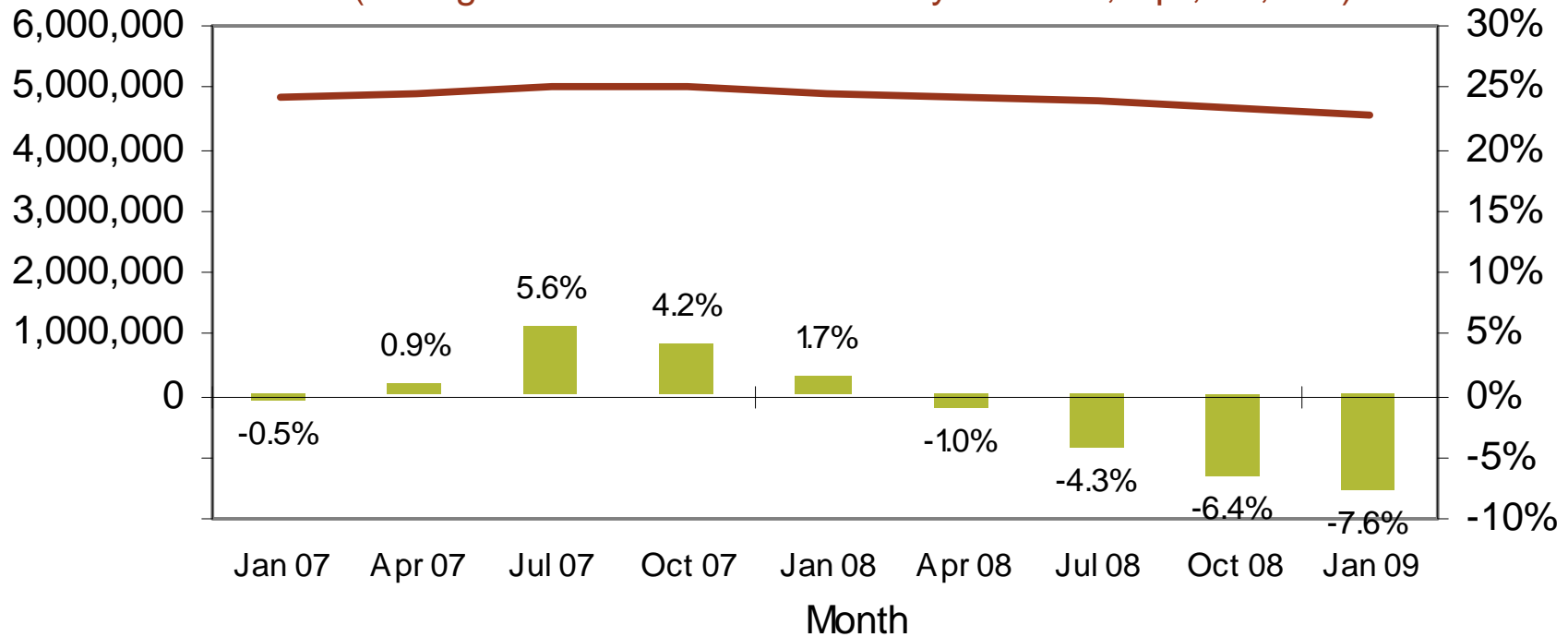
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International Guest Nights

Growth rate

(Rolling totals for 4 months of the year - Jan, Apr, Jul, Oct)



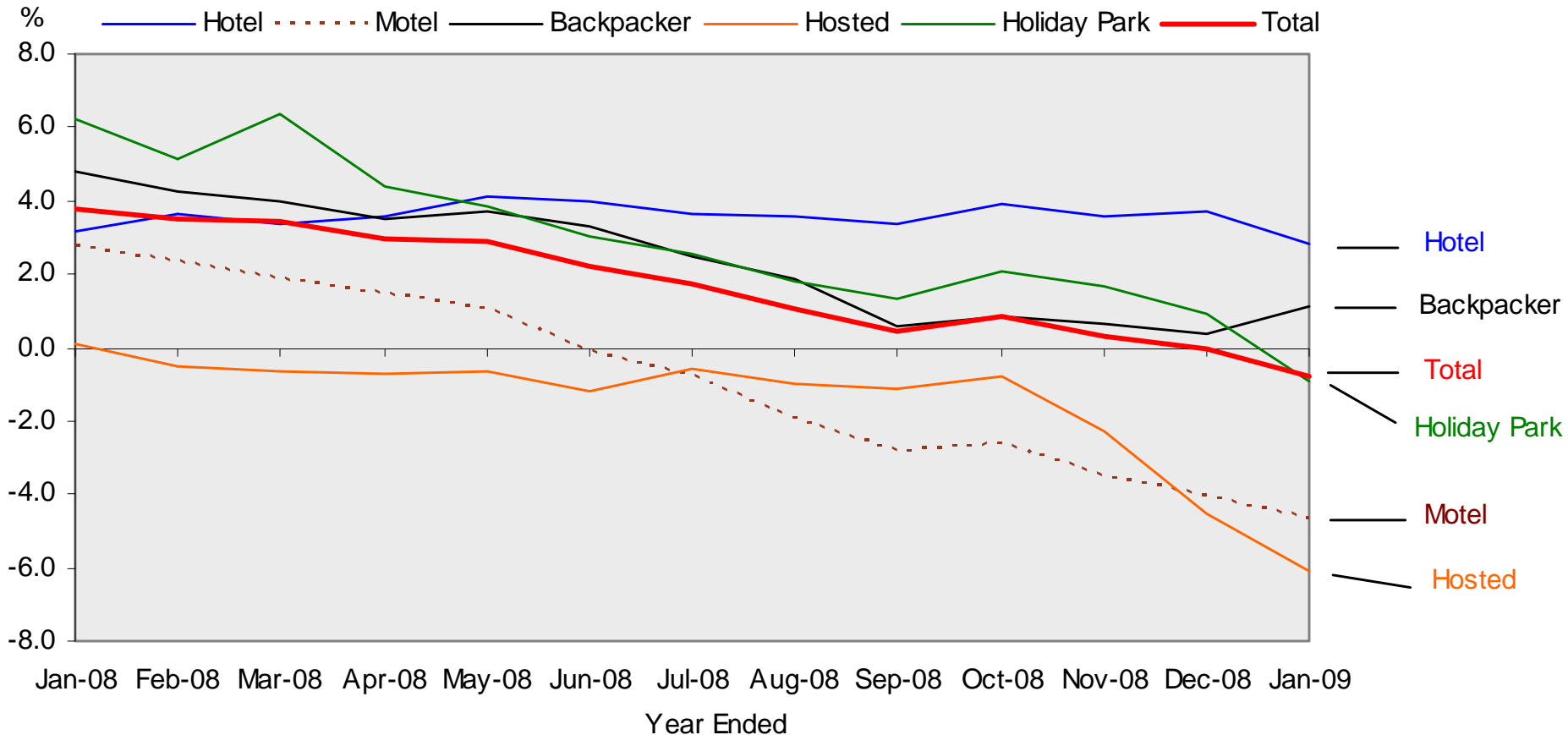
Commercial Guest Nights

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CAM Guest Nights - Total (International and Domestic)

Rolling Annual Growth Rates



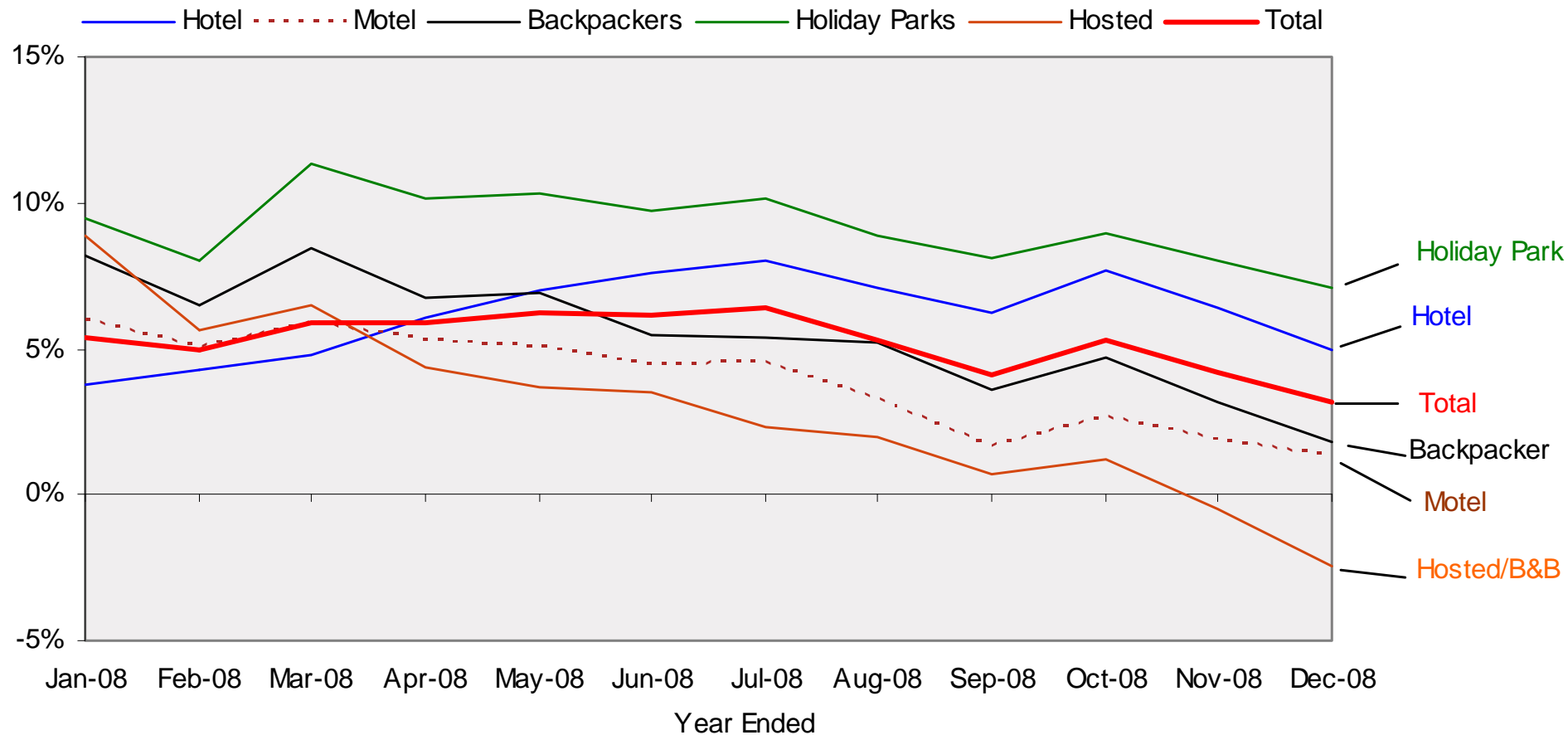
Domestic Spend on Commercial Accommodation (BNZ data)

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Domestic Customer Spend on Accommodation Rolling Annual Growth Rates

Source: BNZ

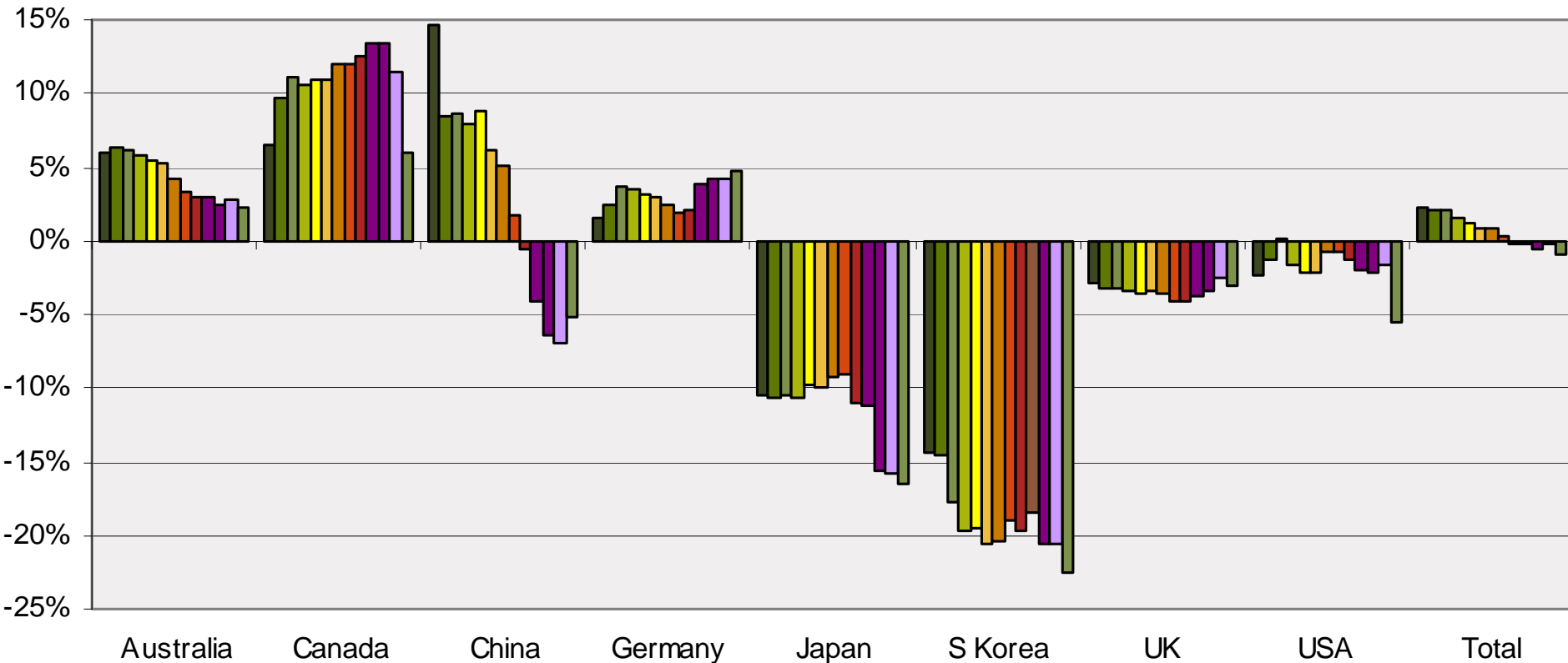




International Visitors by Market

Rolling Annual Growth Rates - Year Ended Jan 2008 - Jan 2009

■ Jan-08 ■ Feb-08 ■ Mar-08 ■ Apr-08 ■ May-08 ■ Jun-08 ■ Jul-08 ■ Aug-08 ■ Sep-08 ■ Oct-08 ■ Nov-08 ■ Dec-08 ■ Jan-09

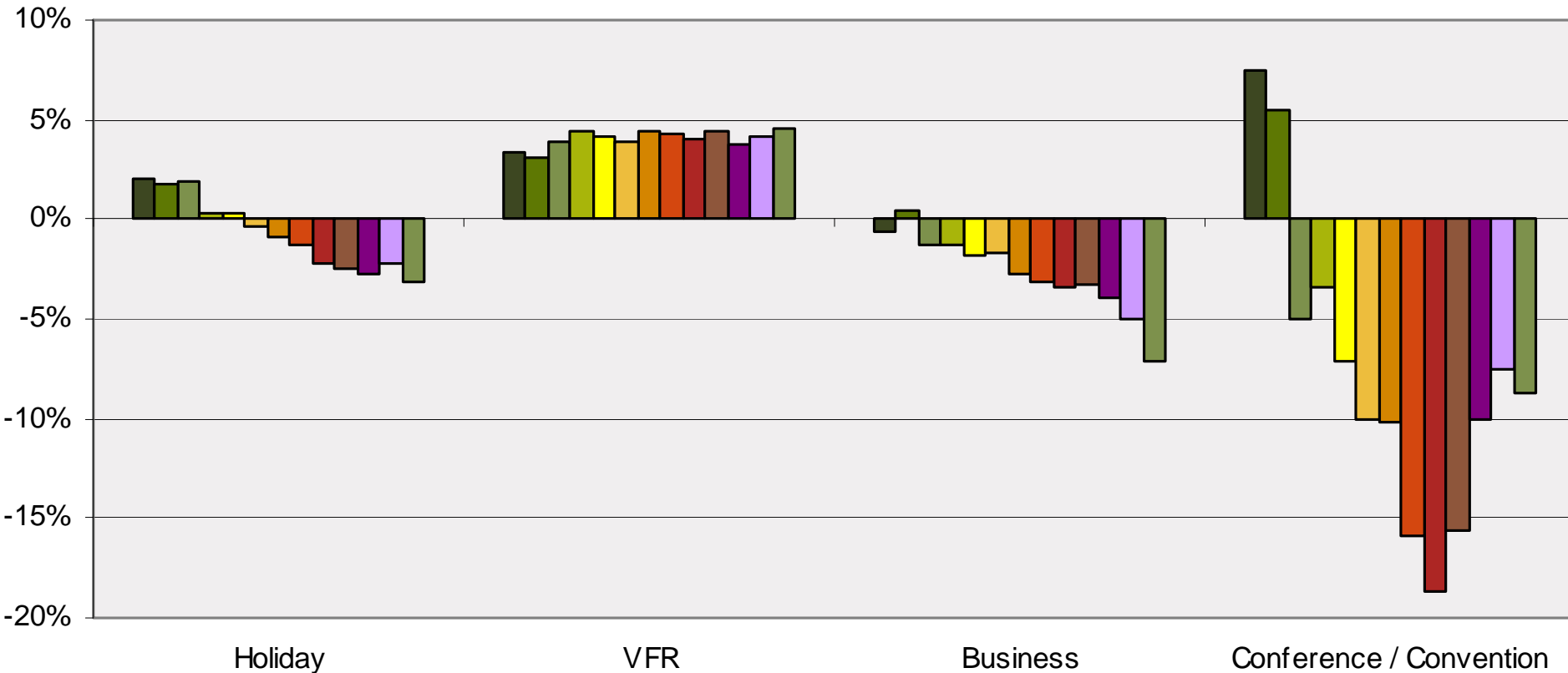




Inbound Travel by Purpose

Rolling Annual Growth Rates - Year Ended Jan 2008 – Jan 2009

■ Jan-08 ■ Feb-08 ■ Mar-08 ■ Apr-08 ■ May-08 ■ Jun-08 ■ Jul-08 ■ Aug-08 ■ Sep-08 ■ Oct-08 ■ Nov-08 ■ Dec-08 ■ Jan-09

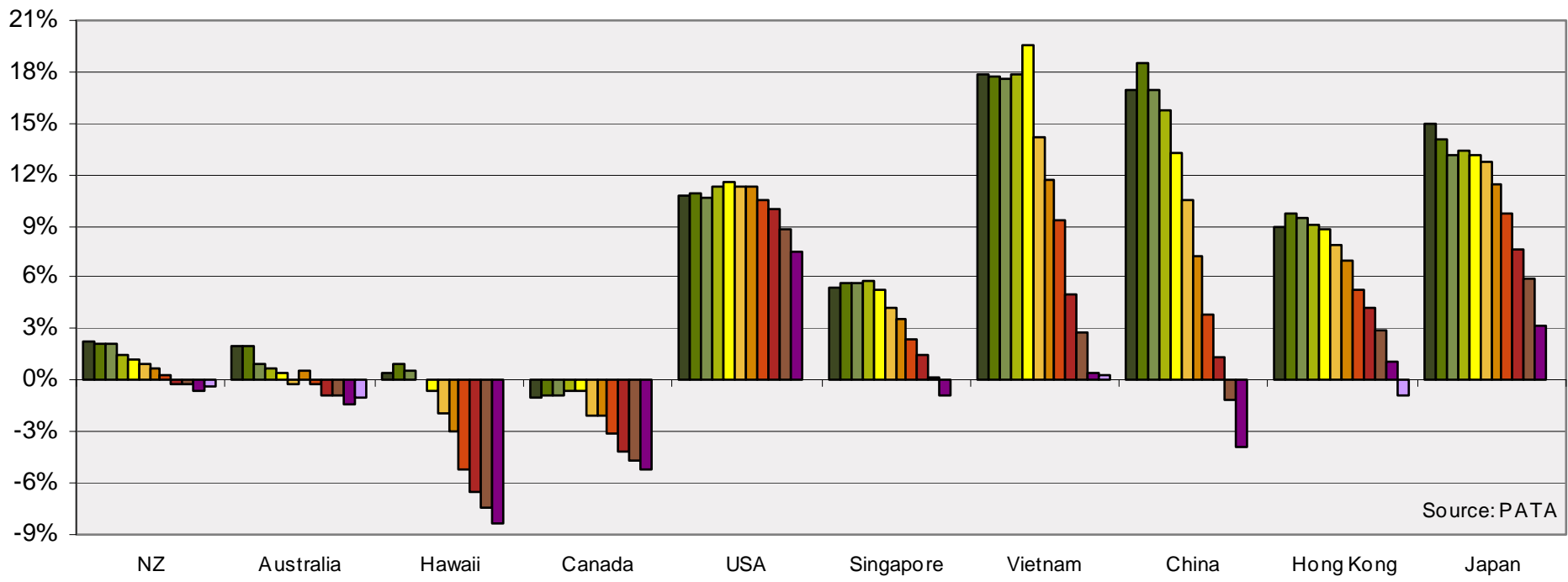




International Comparison - Inbound Travel

Rolling Annual Growth Rates, Year Ended Jan-Dec 2008

■ Jan-08 ■ Feb-08 ■ Mar-08 ■ Apr-08 ■ May-08 ■ Jun-08 ■ Jul-08 ■ Aug-08 ■ Sep-08 ■ Oct-08 ■ Nov-08 ■ Dec-08



Source: PATA

NZ & Australia Comparison

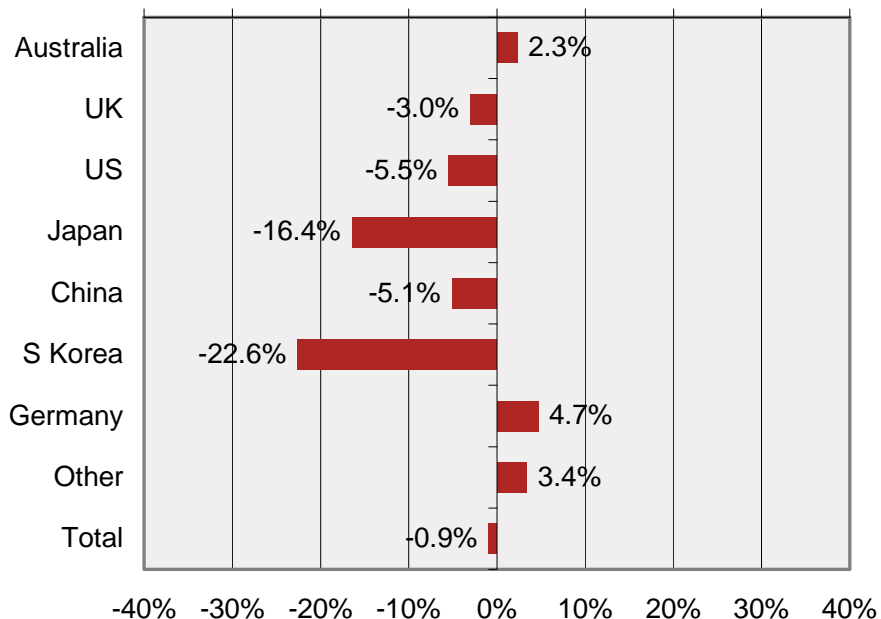
Inbound Travel Performance - YE Jan09

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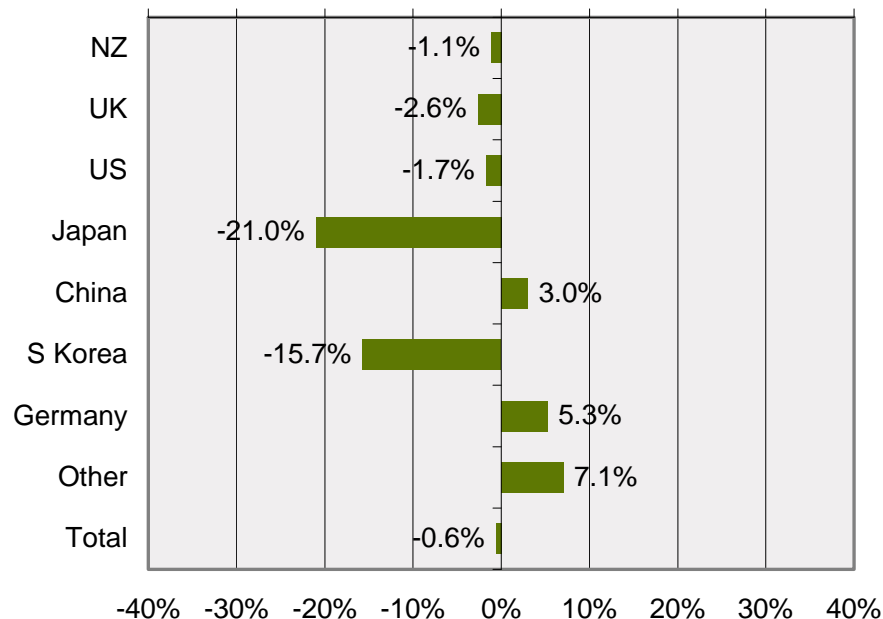


NZ & Australia experienced similar pattern of softness in the year to Jan09
Total inbound: NZ (-0.9%), Aus (-0.6%)

New Zealand



Australia

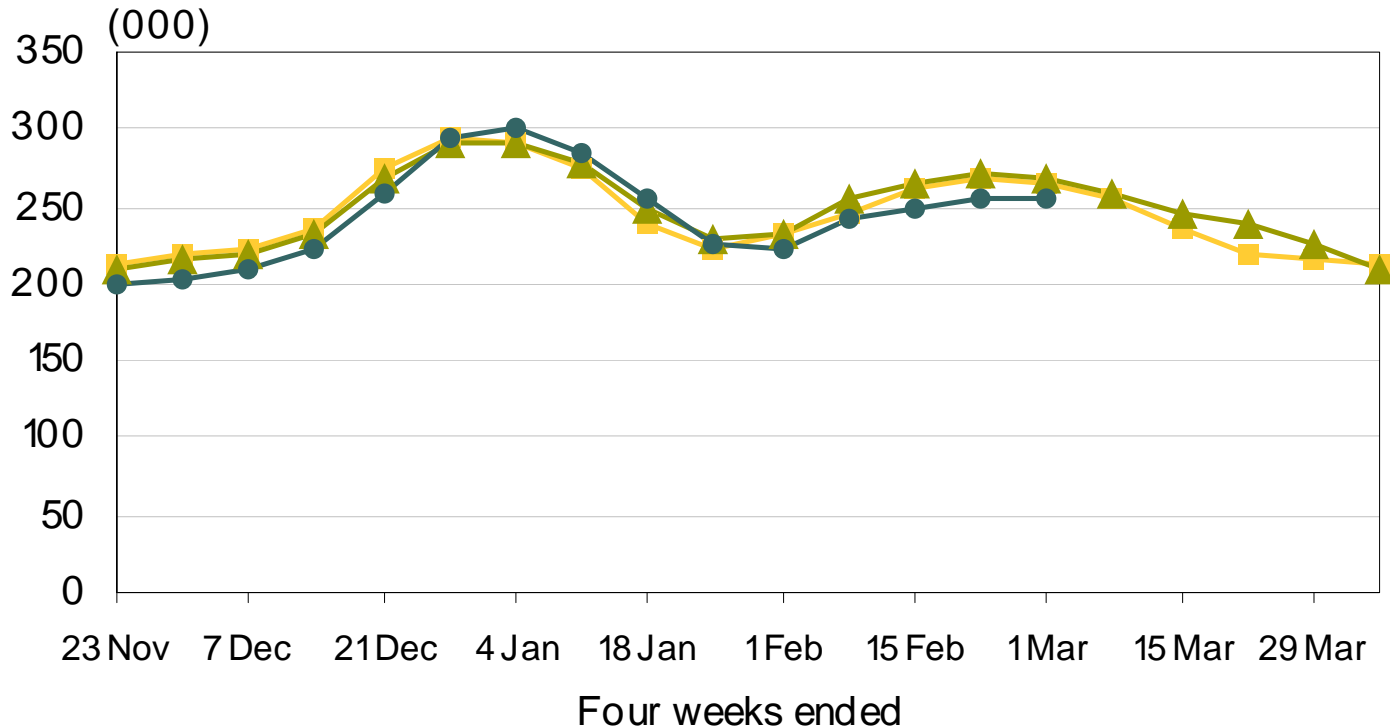




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

All countries

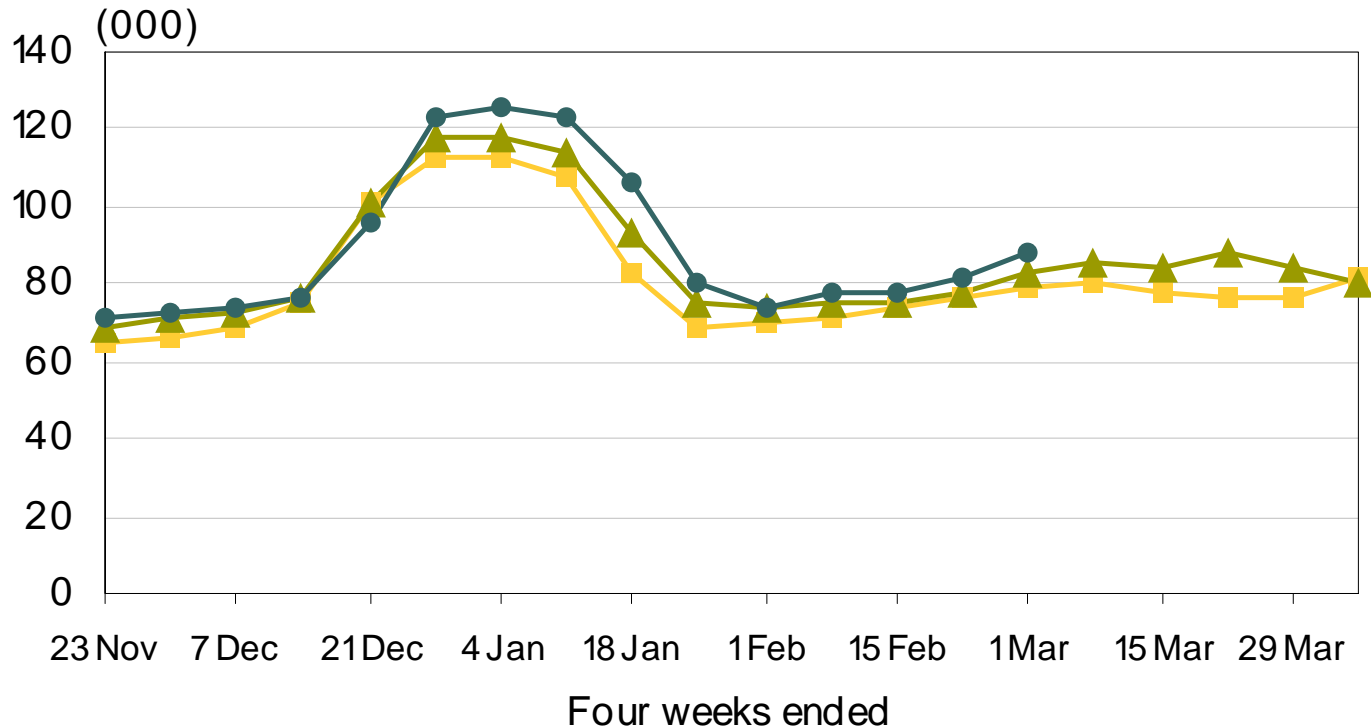




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

Australia

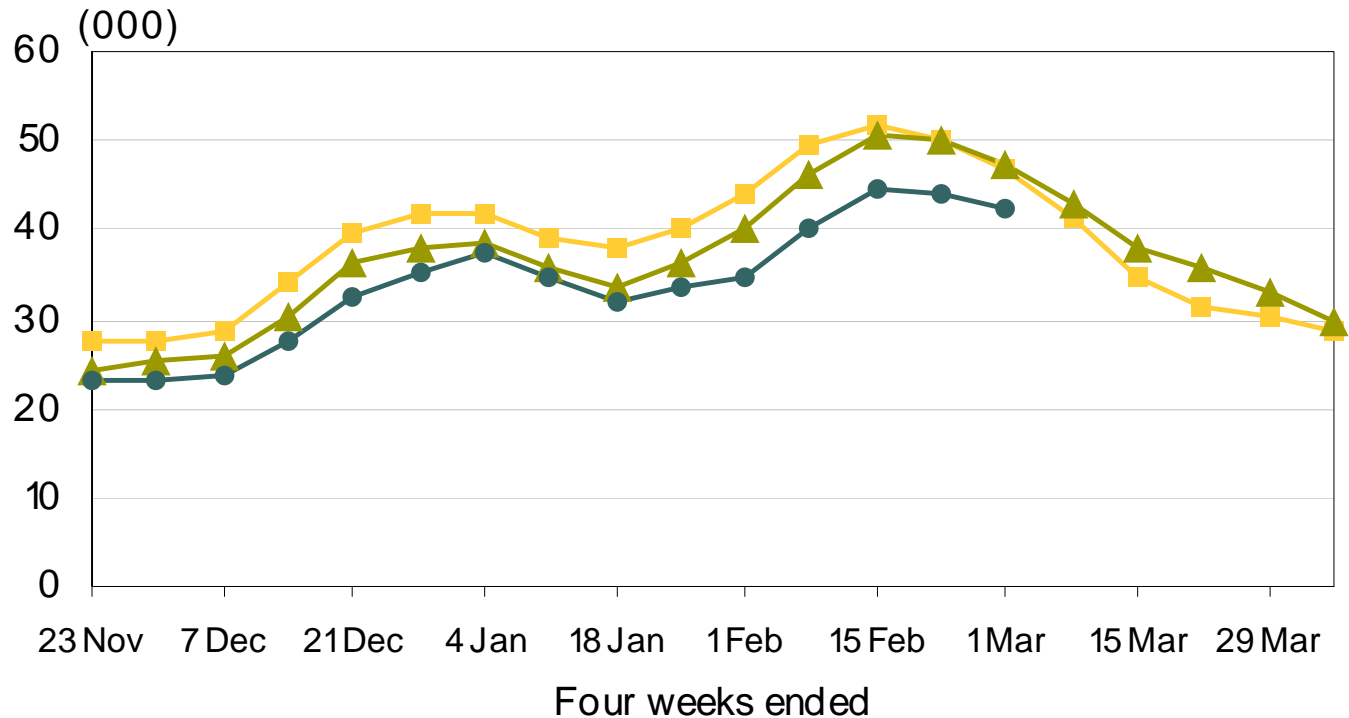




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

United Kingdom

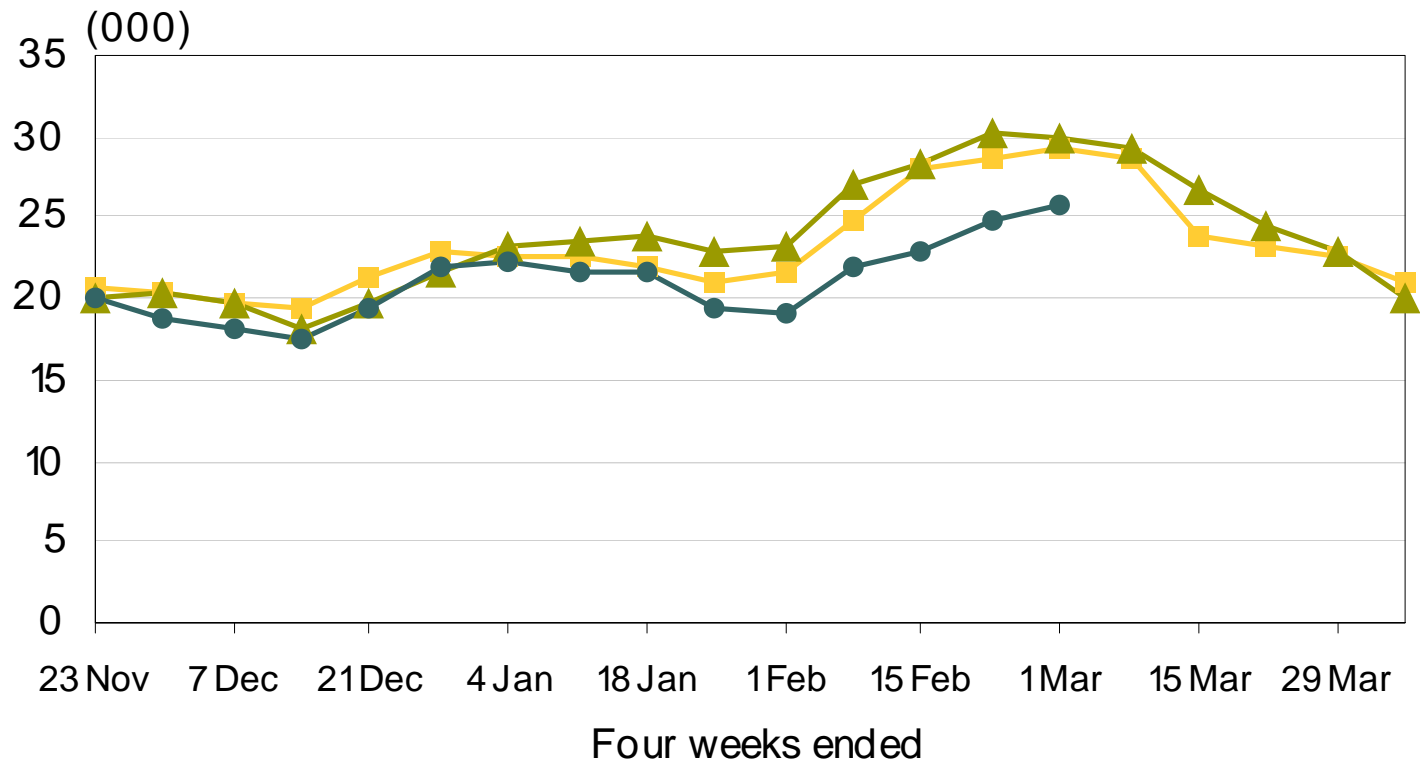




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

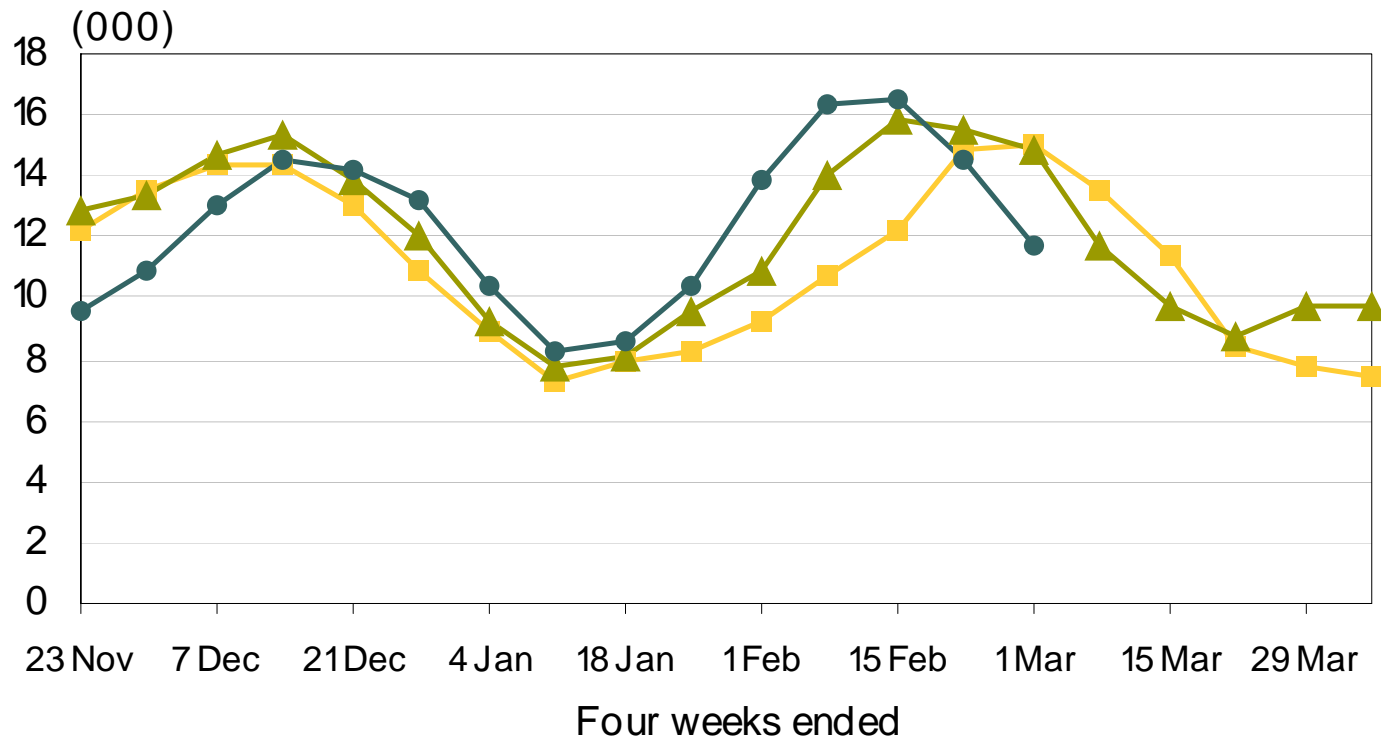
United States of America



Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

People's Republic of China

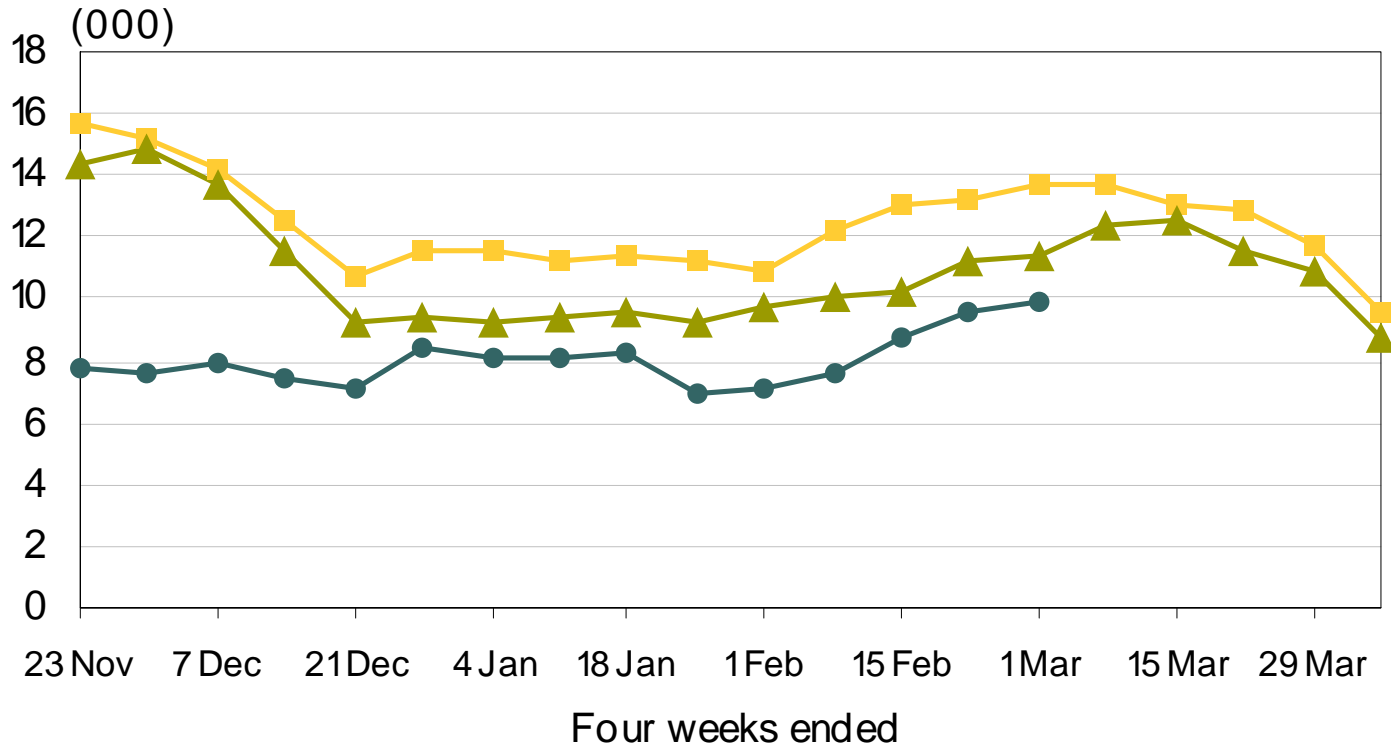




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

Japan

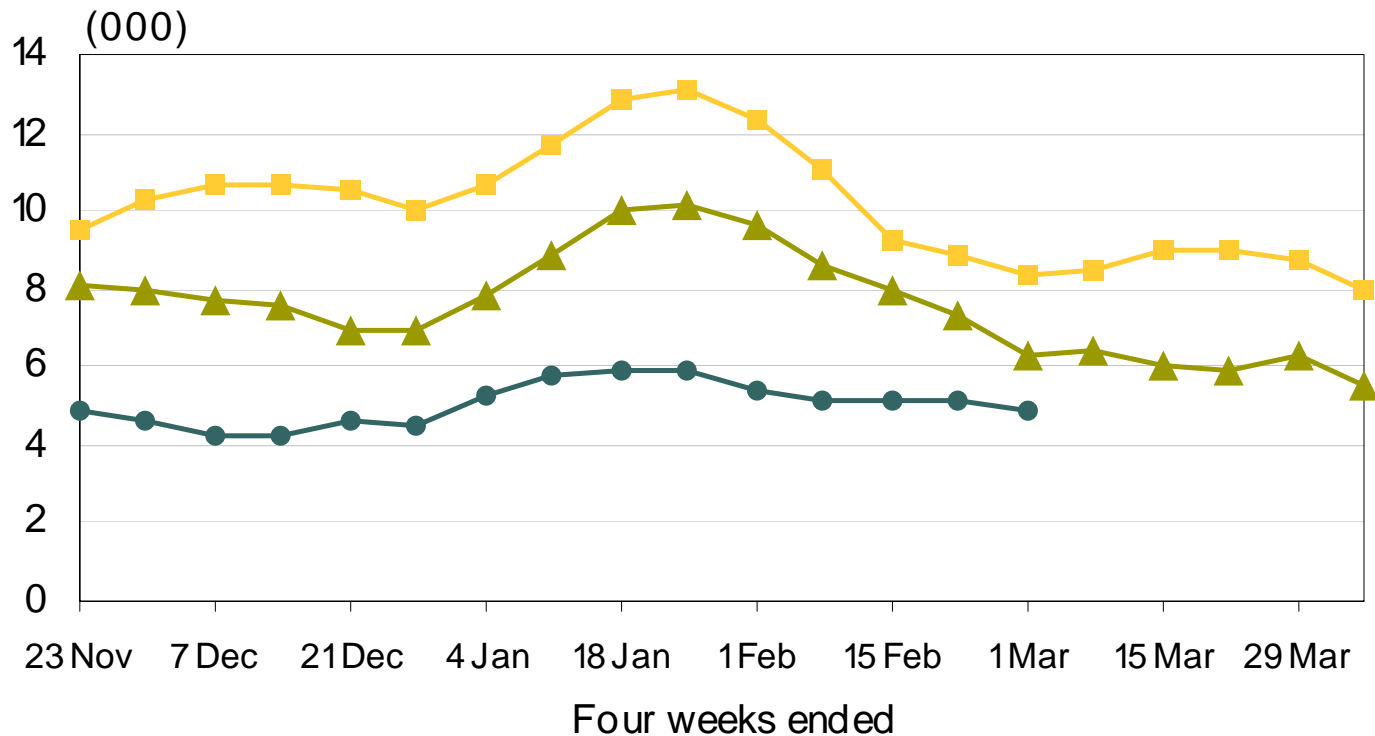




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

Republic of Korea

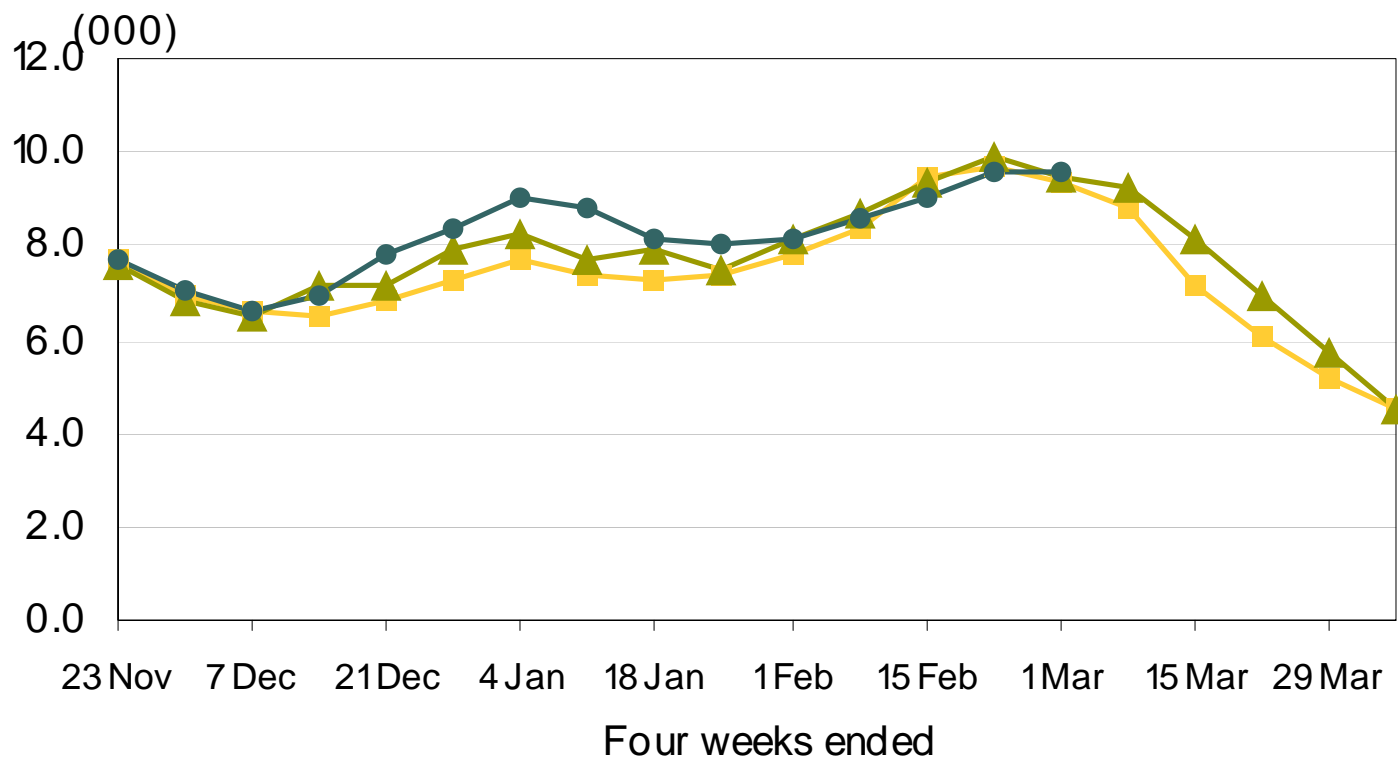




Provisional Four-weekly Overseas Visitor Arrivals

—■— Two years ago —▲— One year ago —●— Current year

Germany



Provisional Four-weekly Overseas Visitor Arrivals – Growth Rates (%)

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| Four weeks ended | Total | Oceania | Asia | Europe | Americas | Africa and the Middle East |
|------------------|-----------|----------|------------|-----------|------------|----------------------------|
| 23 Nov 08 | -5 | 4 | -27 | -2 | 1 | 5 |
| 30 Nov 08 | -6 | 3 | -24 | -3 | -7 | 5 |
| 7 Dec 08 | -5 | 3 | -19 | -4 | -7 | 12 |
| 14 Dec 08 | -4 | 1 | -14 | -6 | -4 | 10 |
| 21 Dec 08 | -4 | -3 | -7 | -6 | -3 | 12 |
| 28 Dec 08 | 1 | 5 | -4 | -4 | 1 | 16 |
| 4 Jan 09 | 3 | 8 | -4 | -1 | -3 | 14 |
| 11 Jan 09 | 3 | 10 | -8 | 0 | -6 | 20 |
| 18 Jan 09 | 4 | 16 | -13 | -1 | -8 | 22 |
| 25 Jan 09 | -2 | 8 | -12 | -2 | -12 | 20 |
| 1 Feb 09 | -5 | 3 | -8 | -9 | -14 | 2 |
| 8 Feb 09 | -5 | 6 | -10 | -9 | -16 | 6 |
| 15 Feb 09 | -5 | 6 | -10 | -9 | -17 | 12 |
| 22 Feb 09 | -6 | 7 | -15 | -9 | -16 | 10 |
| 1 Mar 09 | -5 | 7 | -19 | -7 | -12 | 21 |

NZ Departures – To All Countries

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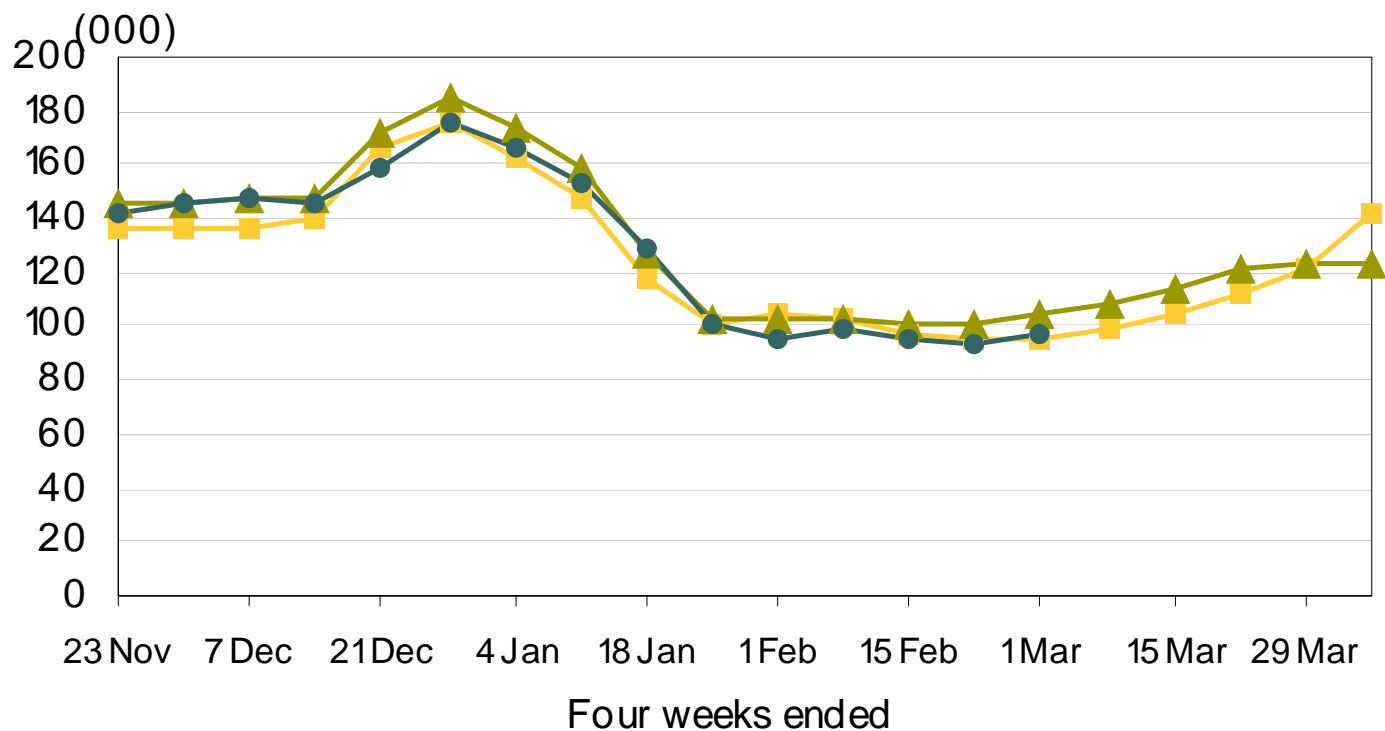
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Provisional Four-weekly New Zealand Resident Departures

—■— Two years ago —▲— One year ago —●— Current year

All countries





Tourism Industry Monitor

Tracking the Performance of the Tourism Sector

March 2009

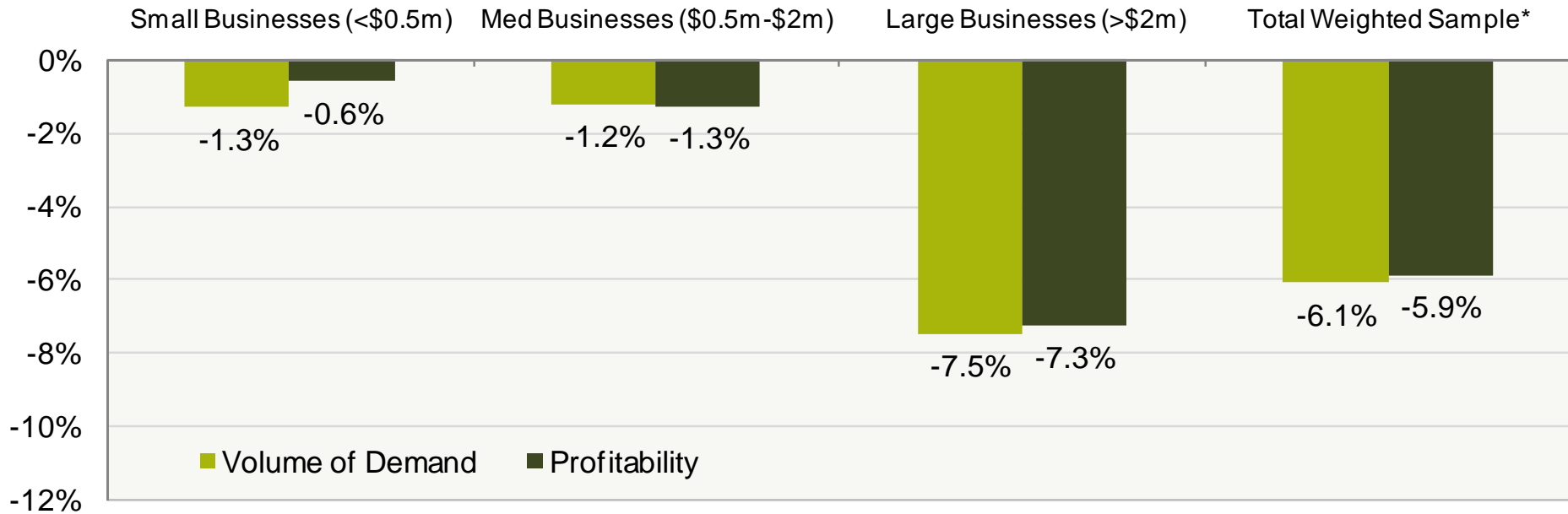
About the Tourism Industry Monitor

The Tourism Industry Monitor (TIM) is an industry initiative led by the Ministry of Tourism, the Tourism Industry Association, Tourism New Zealand and the New Zealand Hotel Council. It is strongly supported by all of New Zealand's major tourism organisations.

The purpose of the TIM is to provide individual tourism businesses with regular, up-to-date information on the performance of the tourism sector, including the outlook for the next three months. It will be topical and relevant to tourism businesses in a rapidly changing market. The information is designed to help individual businesses understand the current tourism environment, benchmark their performance against the wider market, and plan for the future.

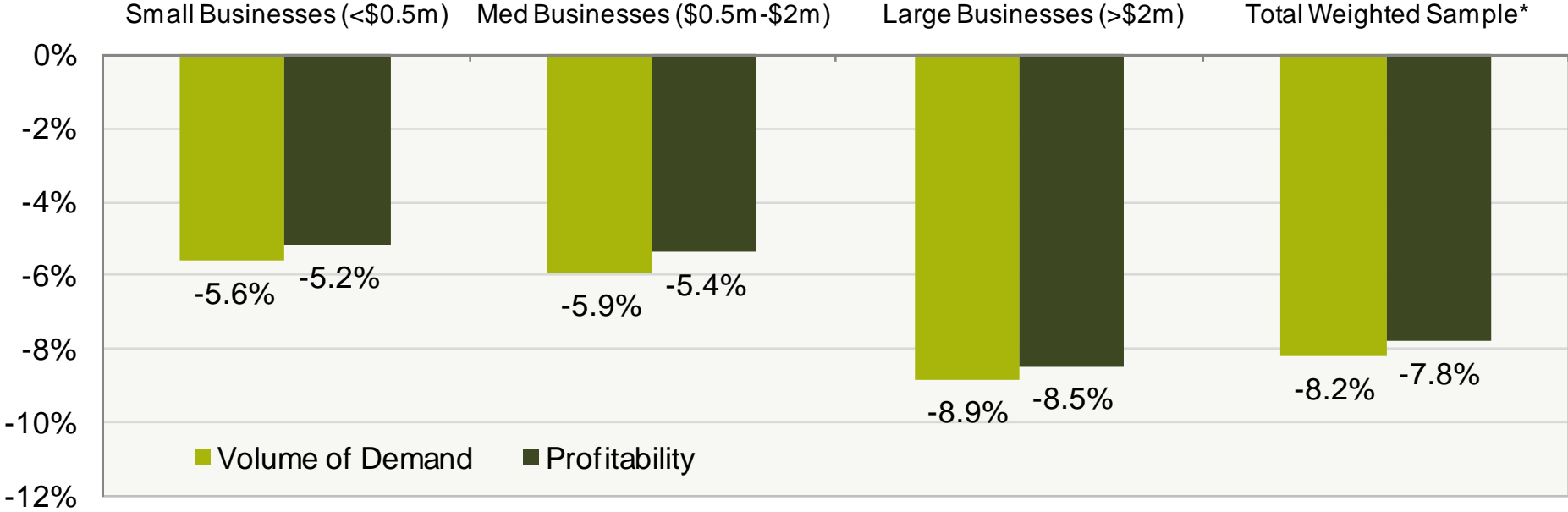


How have the following changed over the past 3 months relative to the same period last year?



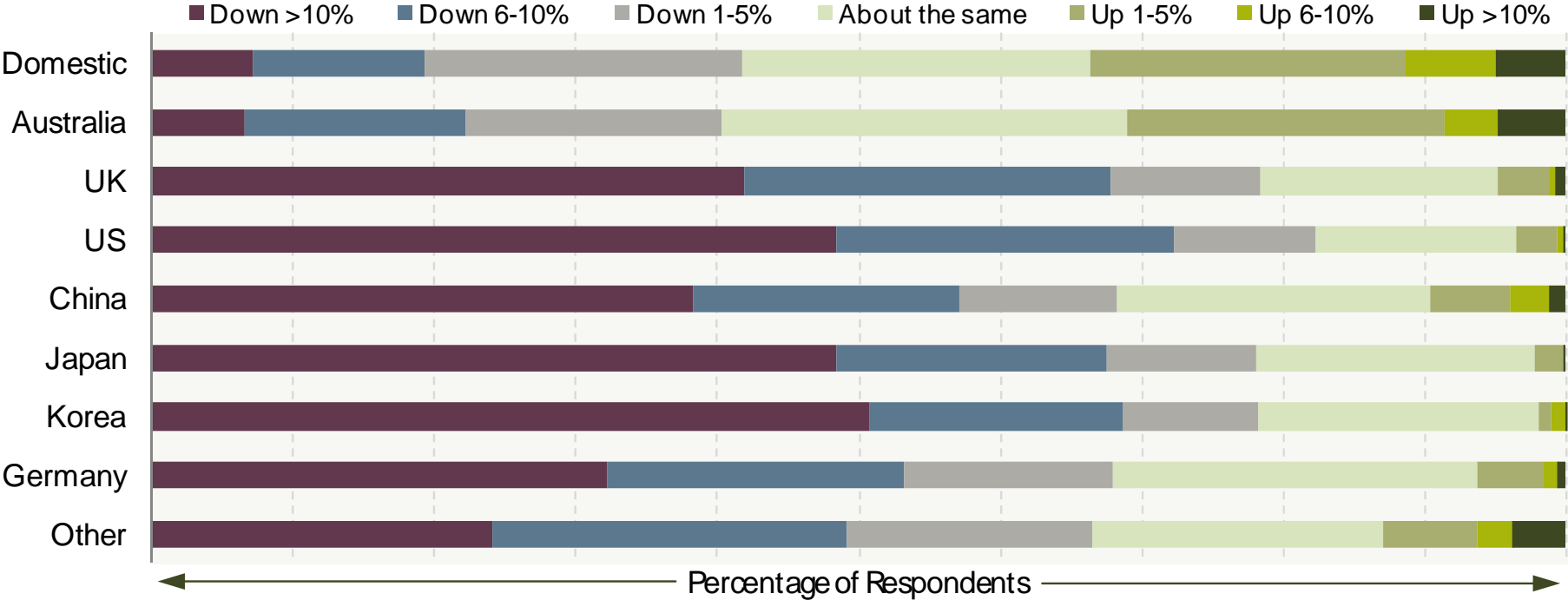


How do you expect the following to change over the *next 3* months relative to the same period last year?



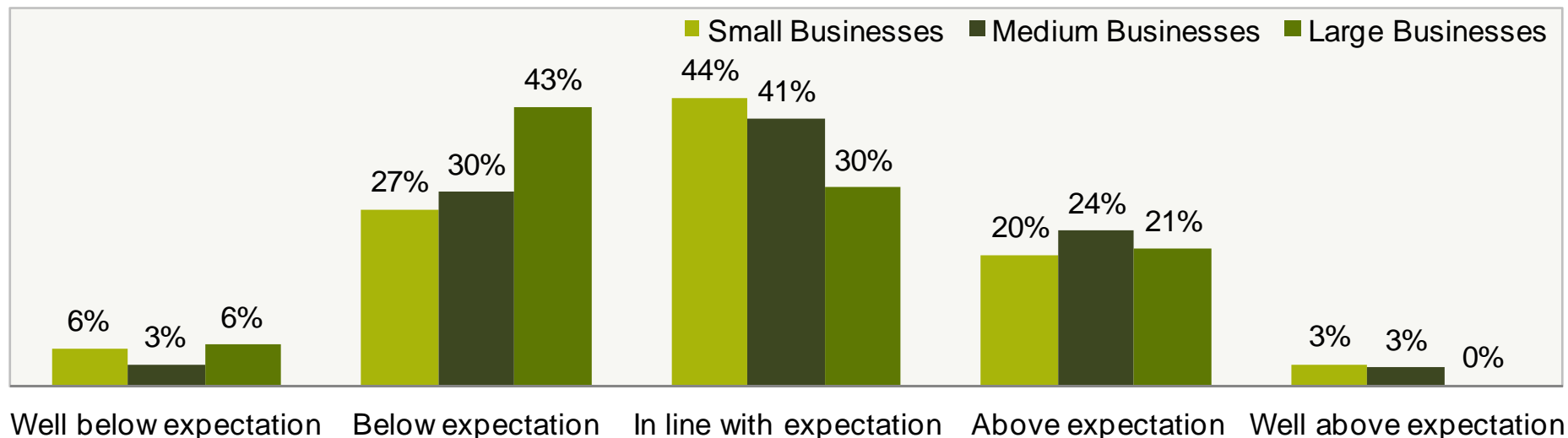


How do you expect demand from the following markets to change in the *next* 3 months relative to the same period last year?



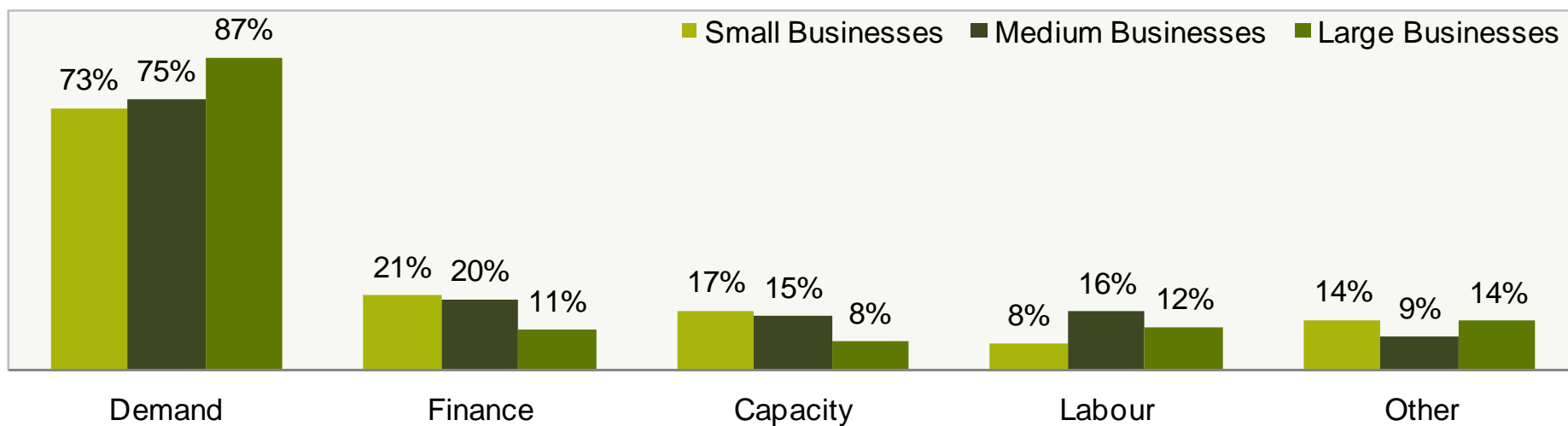


How does the performance of your branch/division over the past 3 months compare with prior expectation?





Which factors are limiting the ability of your branch/division to perform optimally? A shortage of...





Looking forward

- How the global economy tracks is main determinant
- Tourism is resilient at 'global' level, and in NZ
- Areas of strength for NZ tourism e.g Aust, VFR, Domestic
- There are responses underway



What Ministry of Tourism is doing

- Tracking the sector
- Research on ‘shocks’ and their effects in NZ tourism
- Established TIM to track sector sentiment
- Convening sector leaders meeting on 8 April – to assess data and discuss responses
- Conducting forecasting round mid-year

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Discussion...