

Tourism Update and Outlook

Bruce Bassett, Research Manager, Ministry of Tourism



www.tourism.govt.nz
www.tourismresearch.govt.nz





Travel Agents Association New Zealand Annual General Meeting

2 September 2009



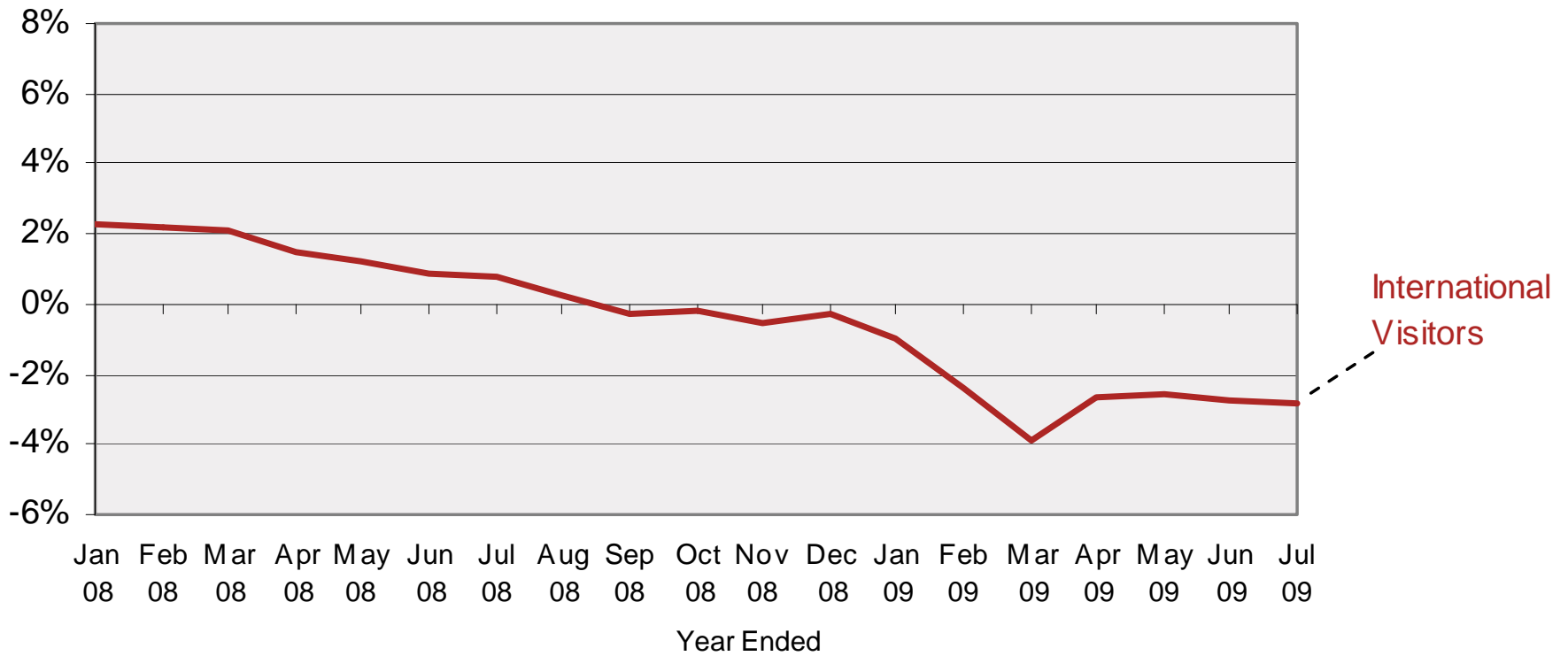
What I am covering...

- Latest tourism data – where we are
- Forecasts – where we are heading
- Outbound analysis



Inbound Tourism – International Visitor Arrivals

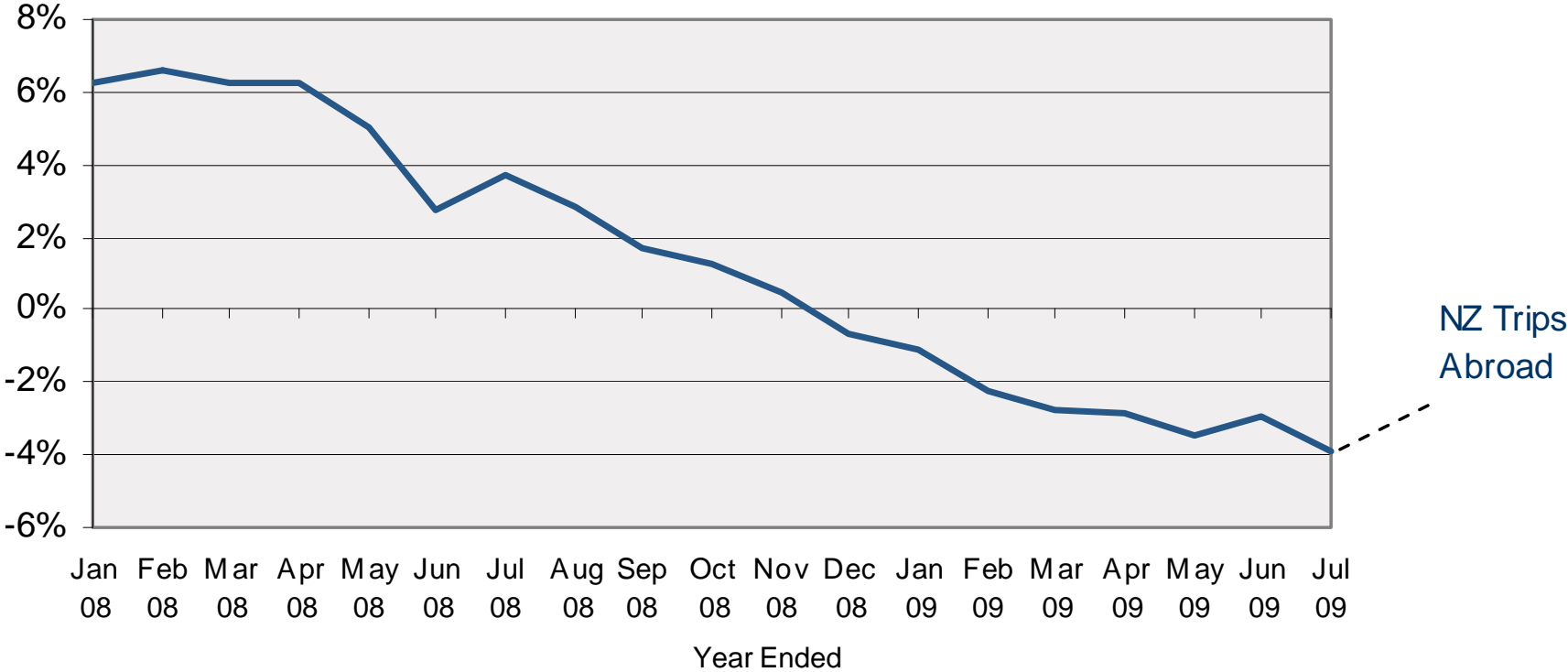
Rolling Annual Growth Rates - Year Ended Jan08-Jul09





Outbound Tourism – Overseas Trips by NZers

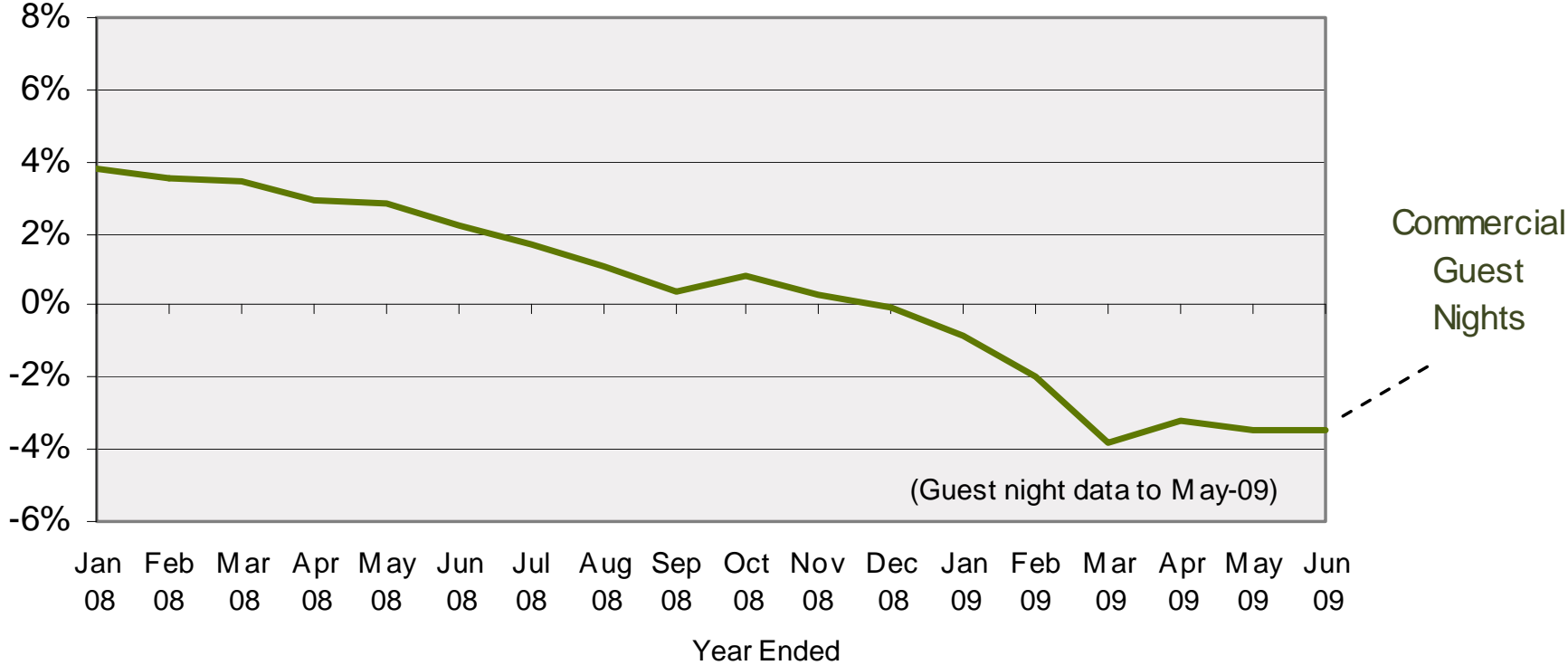
Rolling Annual Growth Rates - Year Ended Jan08-Jul09





Commercial Accommodation Guest Nights

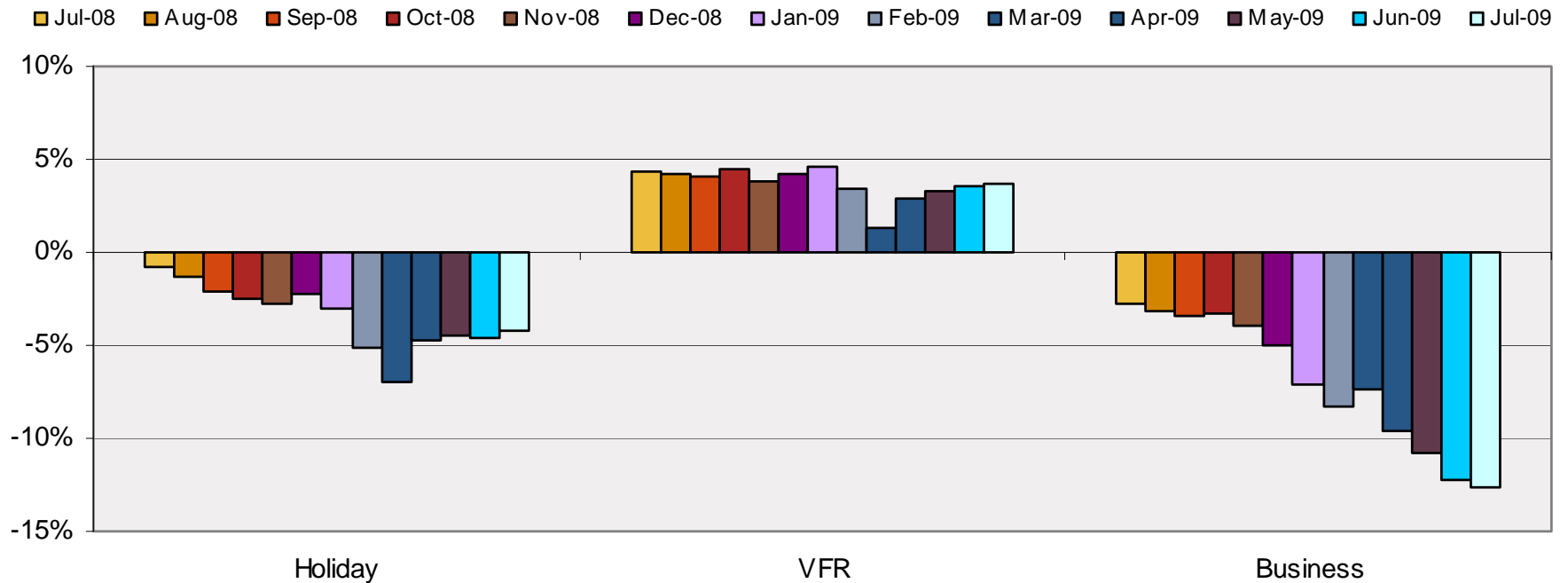
Rolling Annual Growth Rates - Year Ended Jan08-Jun09





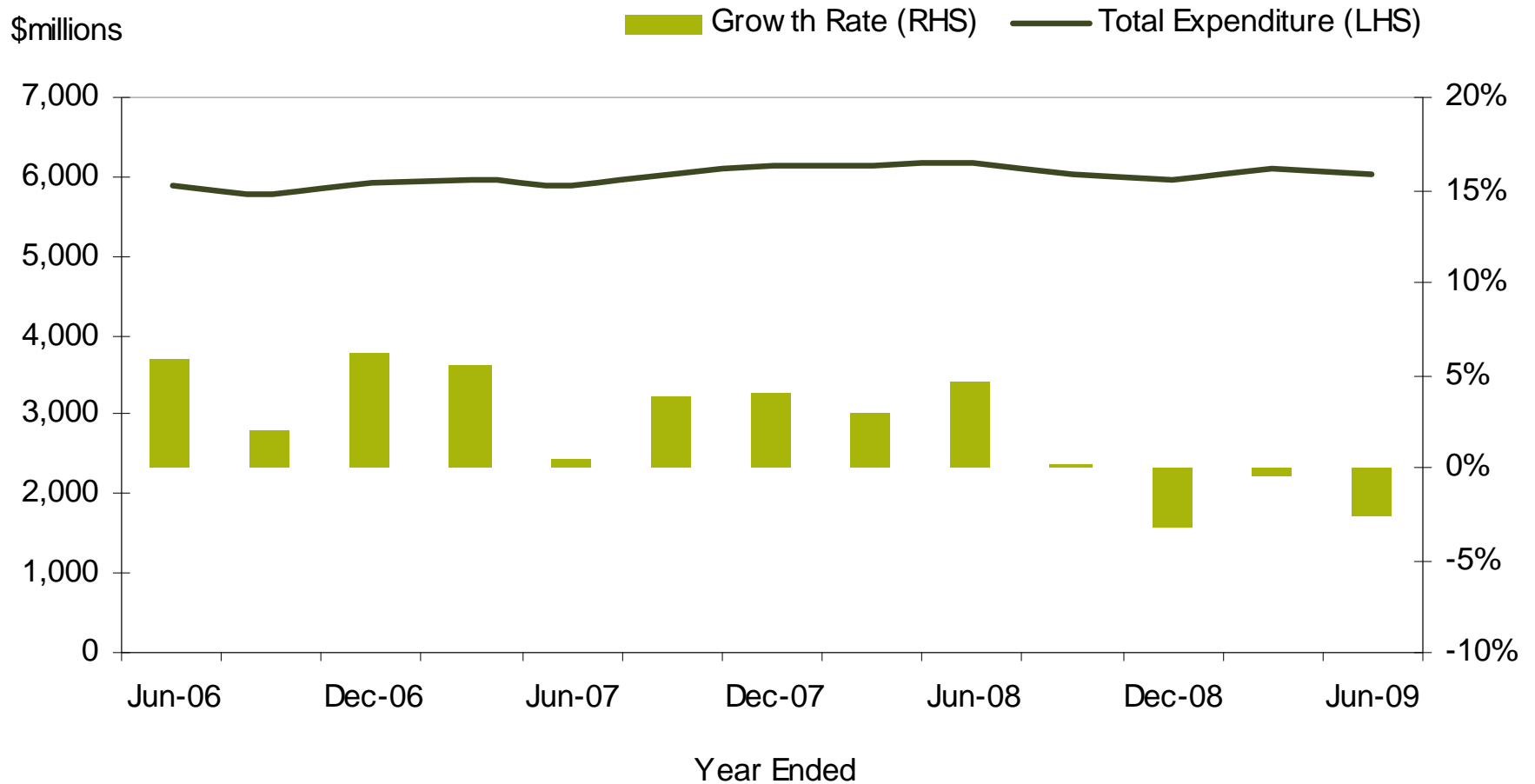
Inbound Travel by Purpose

Rolling Annual Growth Rates - Year Ended Jul08-Jul09



International Visitor Expenditure

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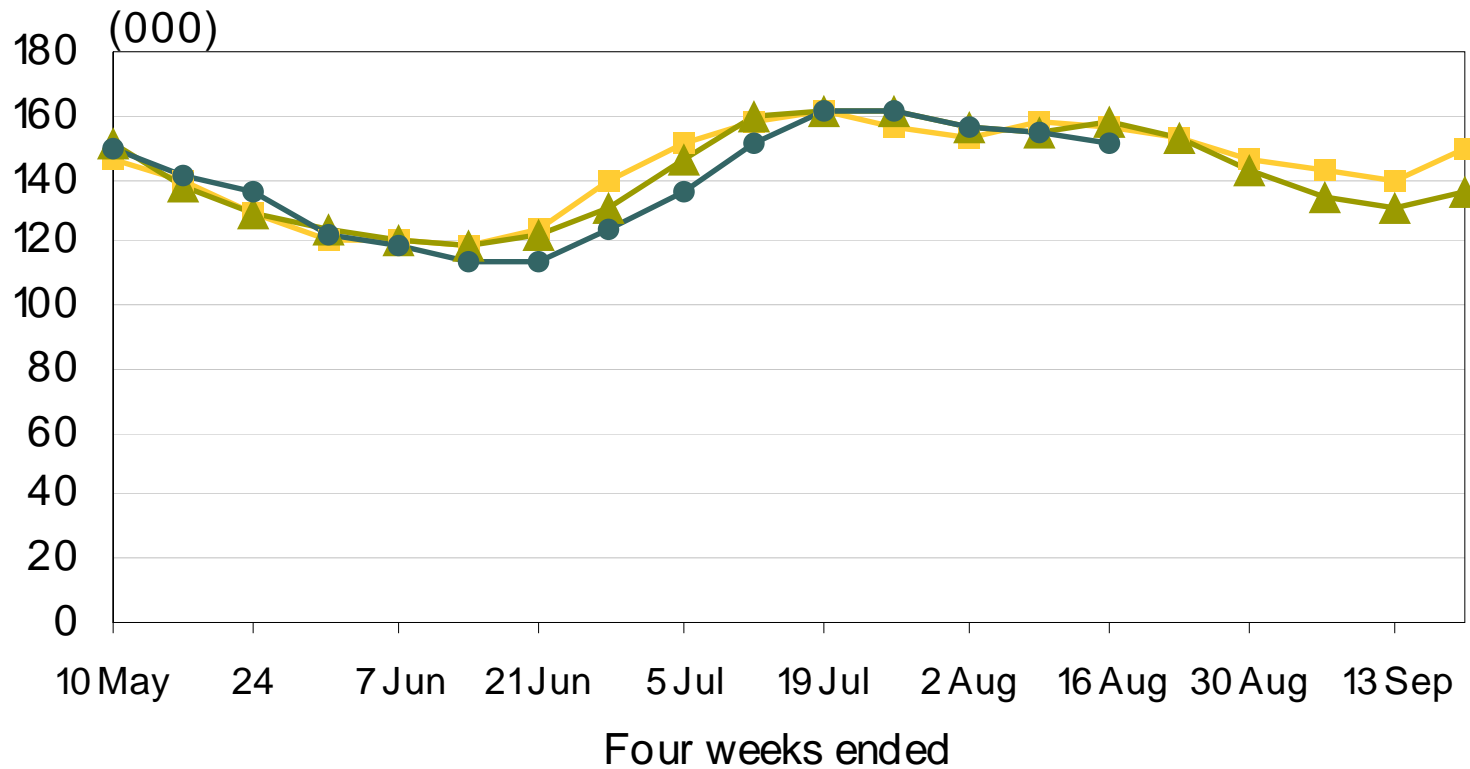
Four weekly arrivals data...

Four Weekly Arrivals

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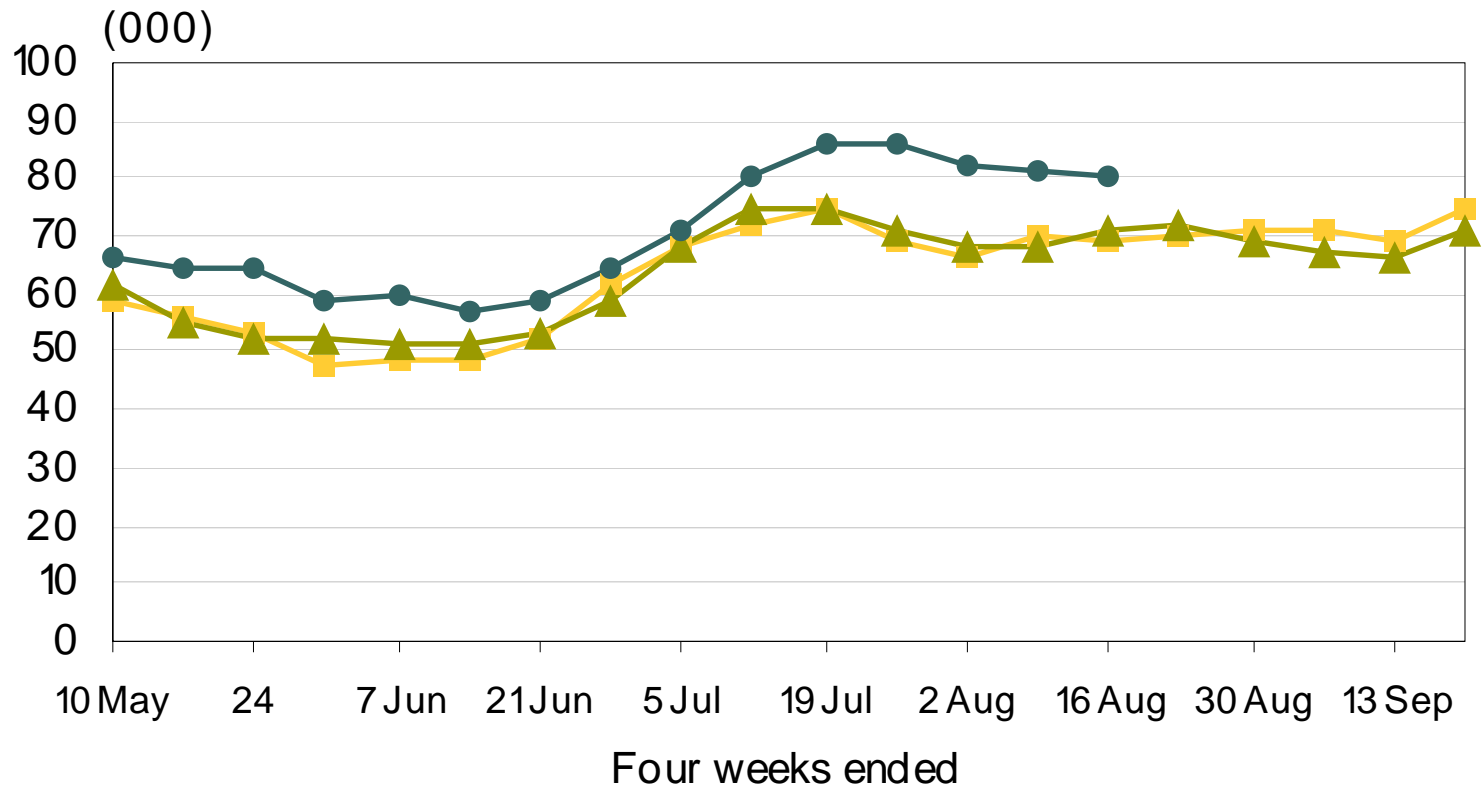


All countries



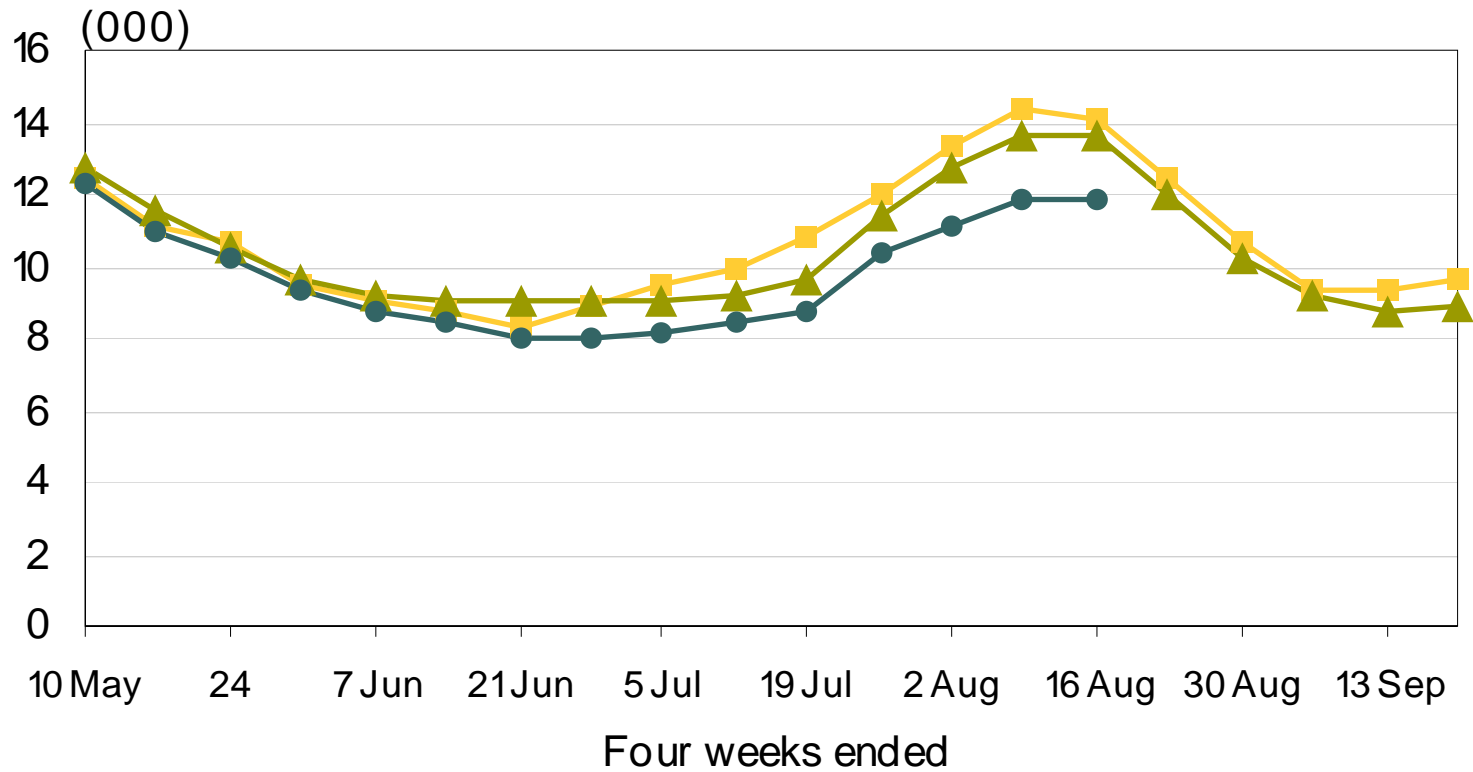


Australia



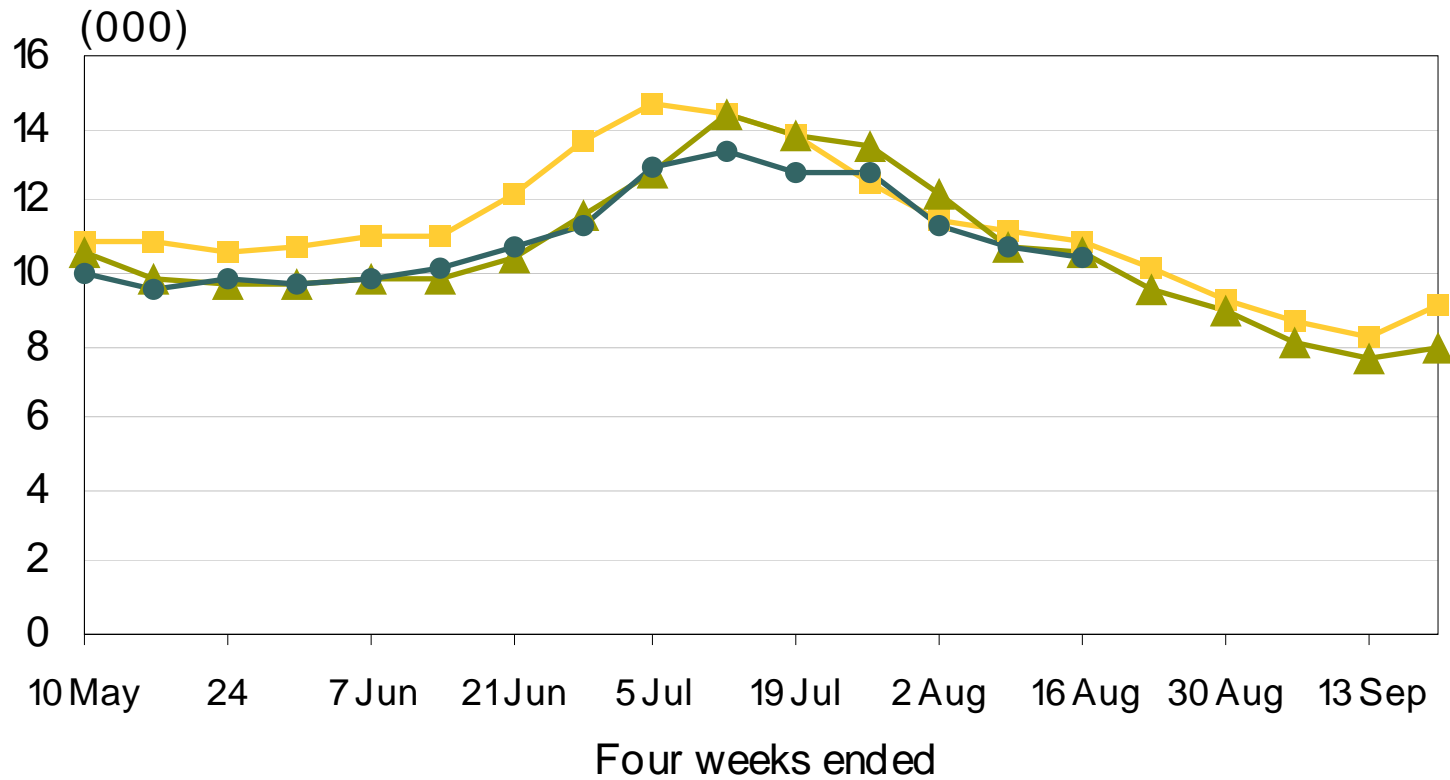


United Kingdom



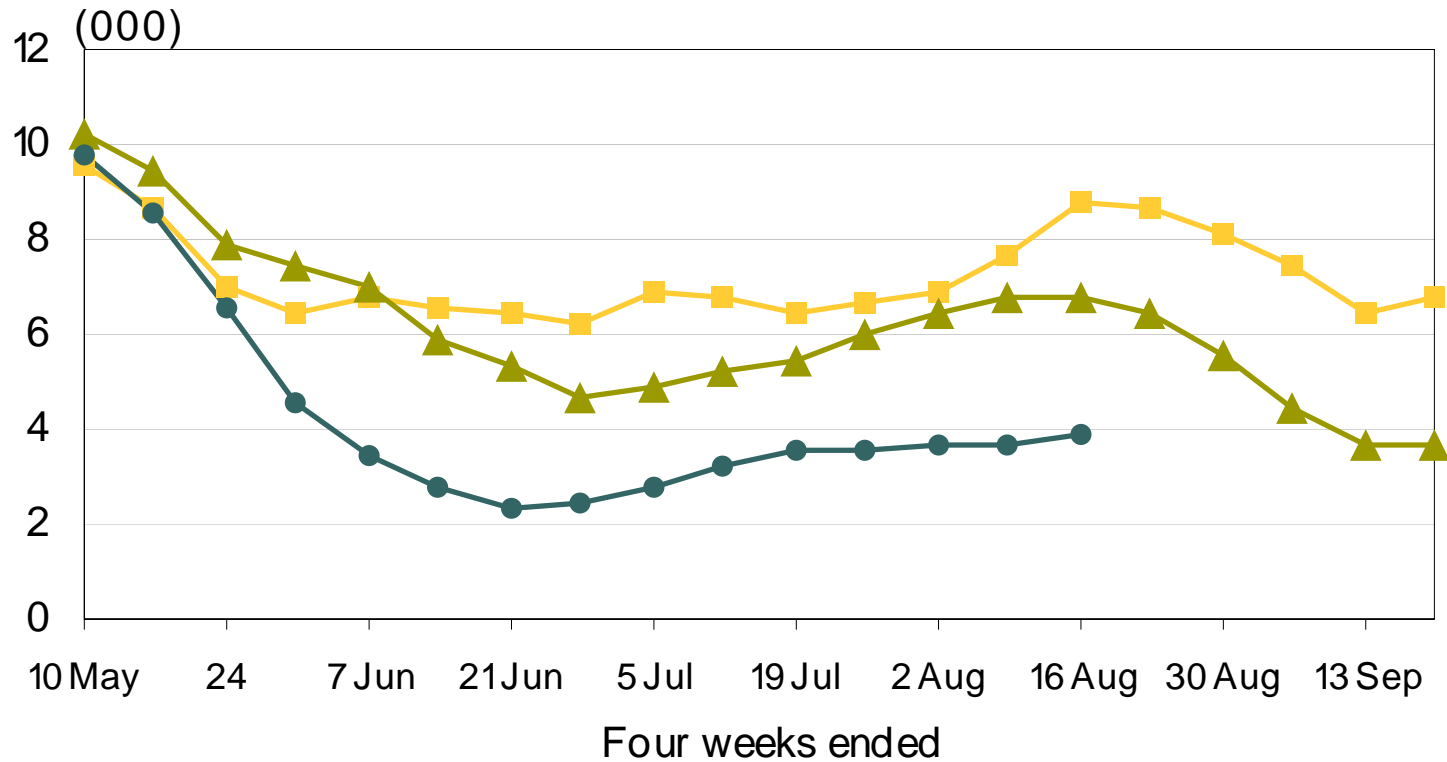


United States of America





People's Republic of China

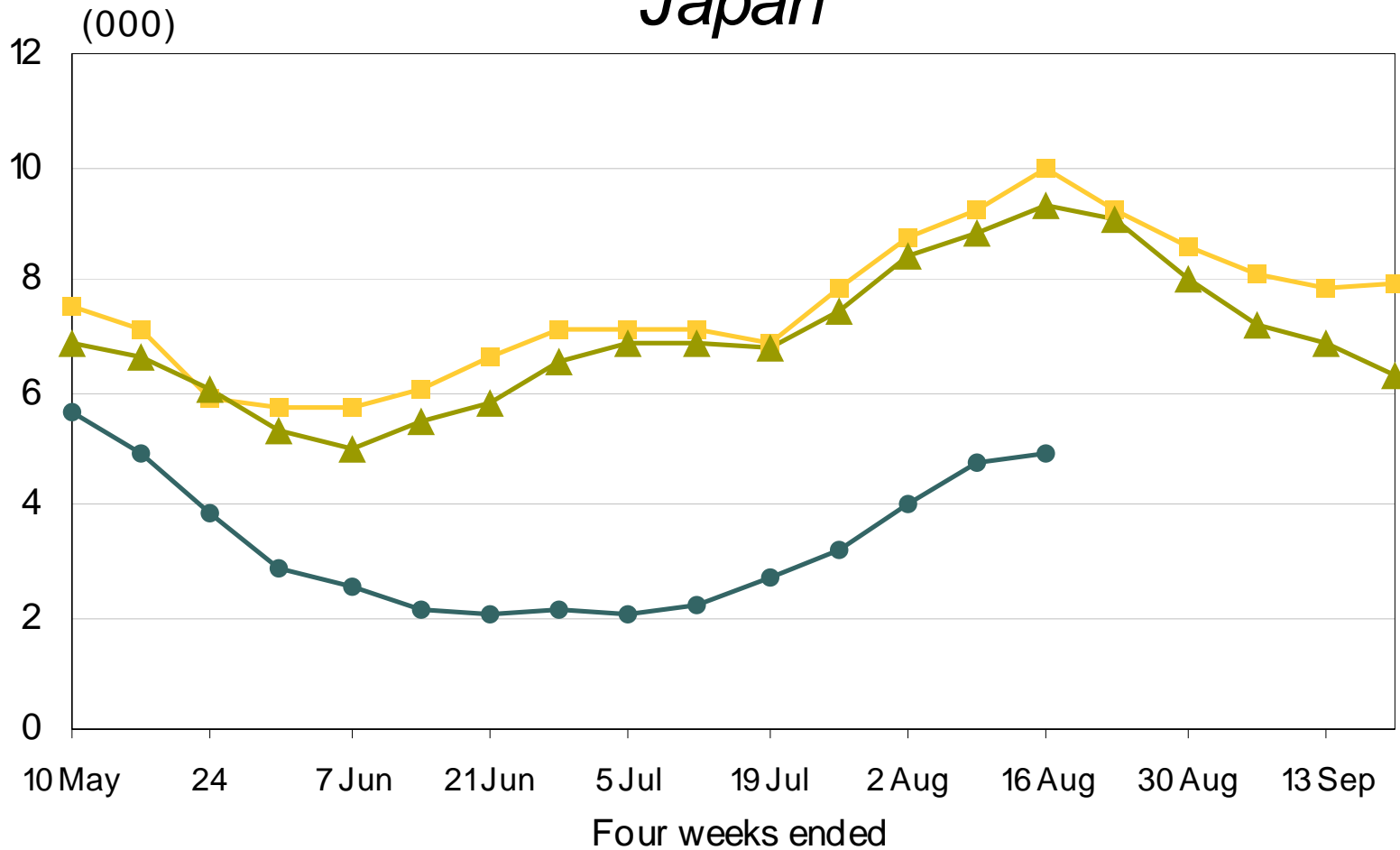


Four Weekly Arrivals

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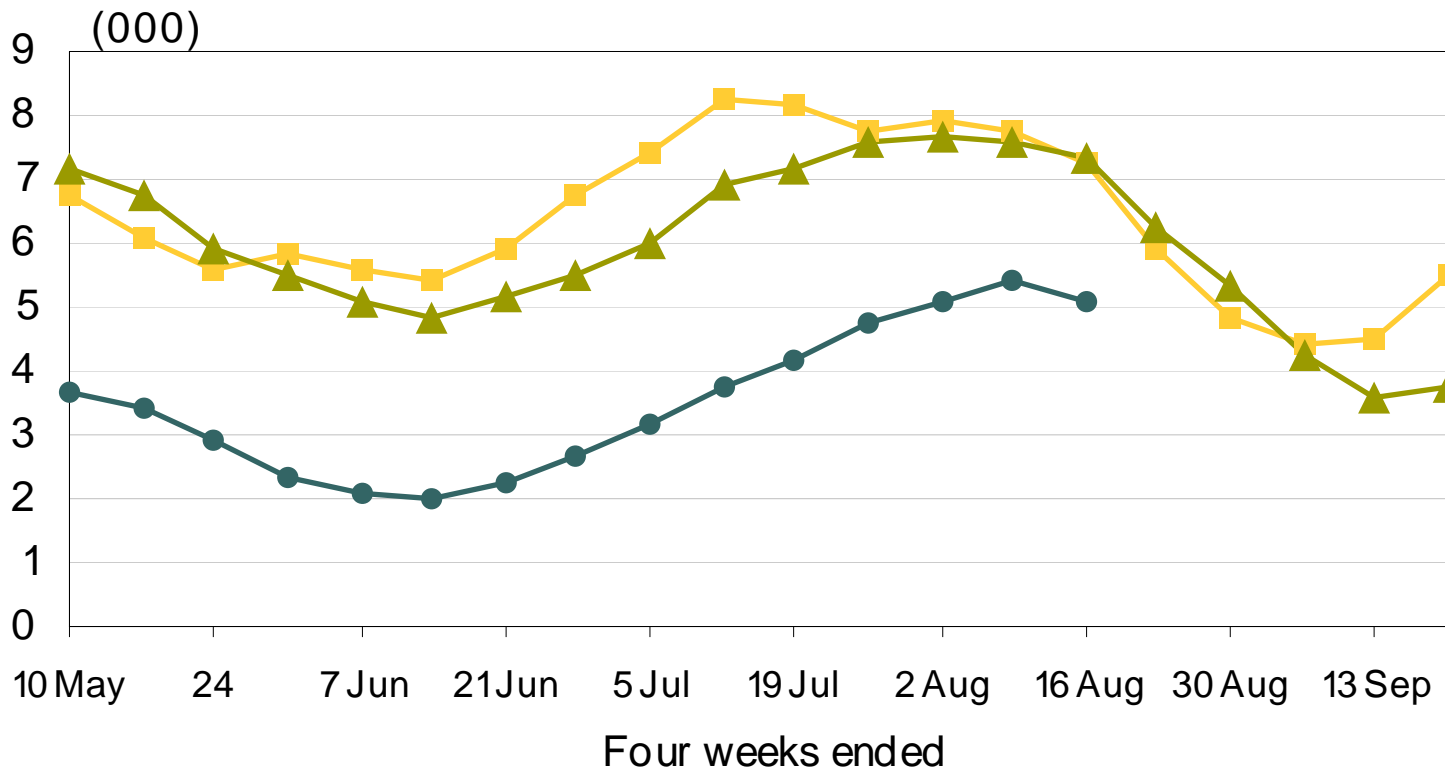


Japan





Republic of Korea

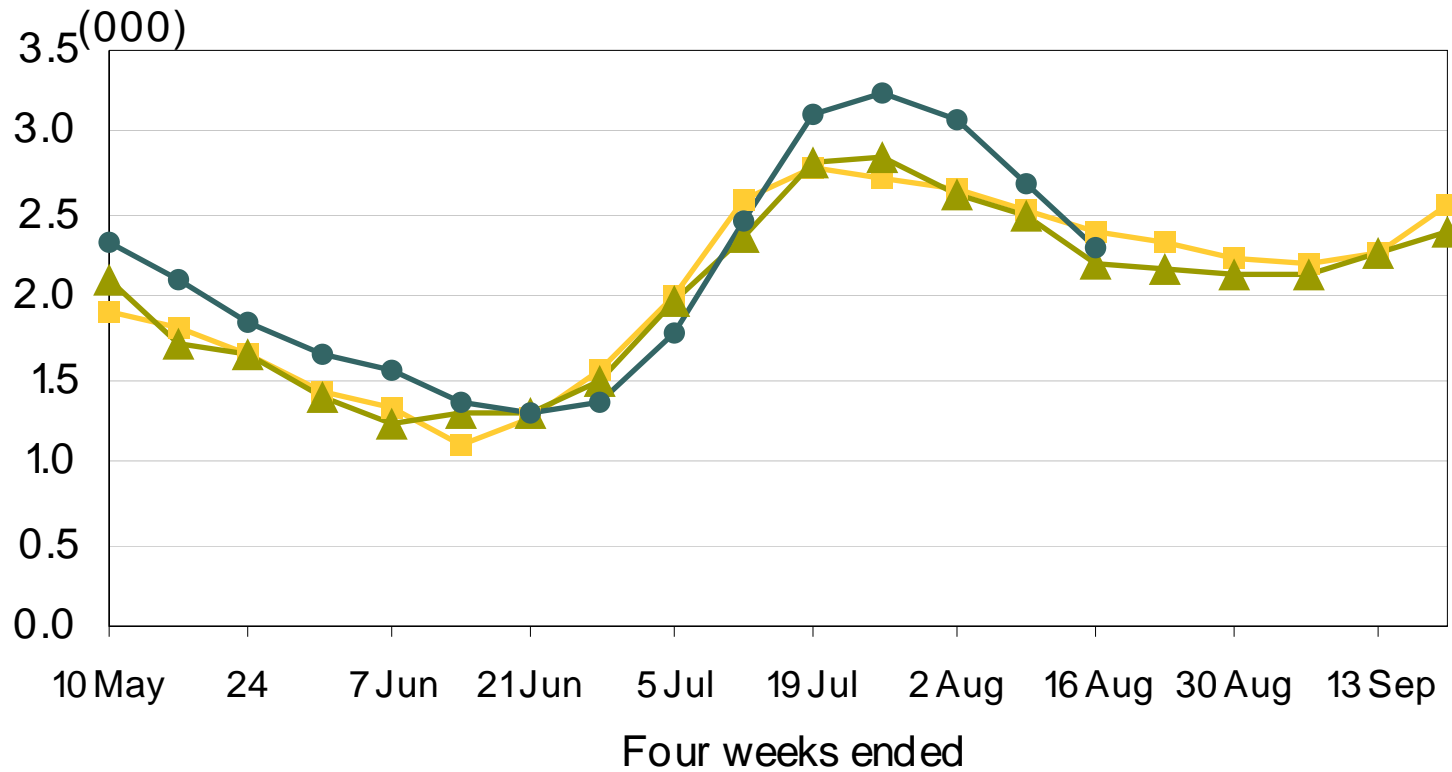


Four Weekly Arrivals

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Germany





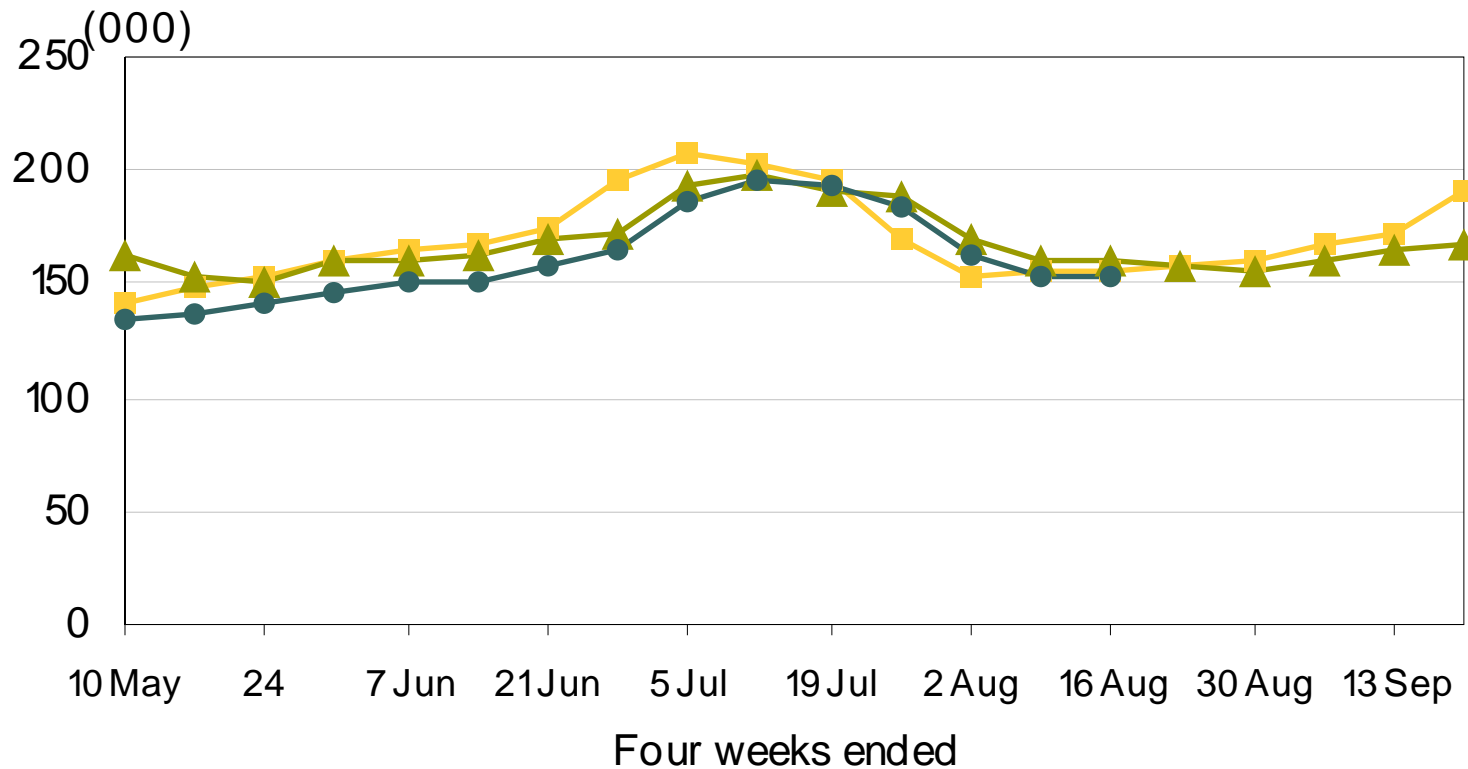
Four weekly departures data...

Four Weekly Departures

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All countries

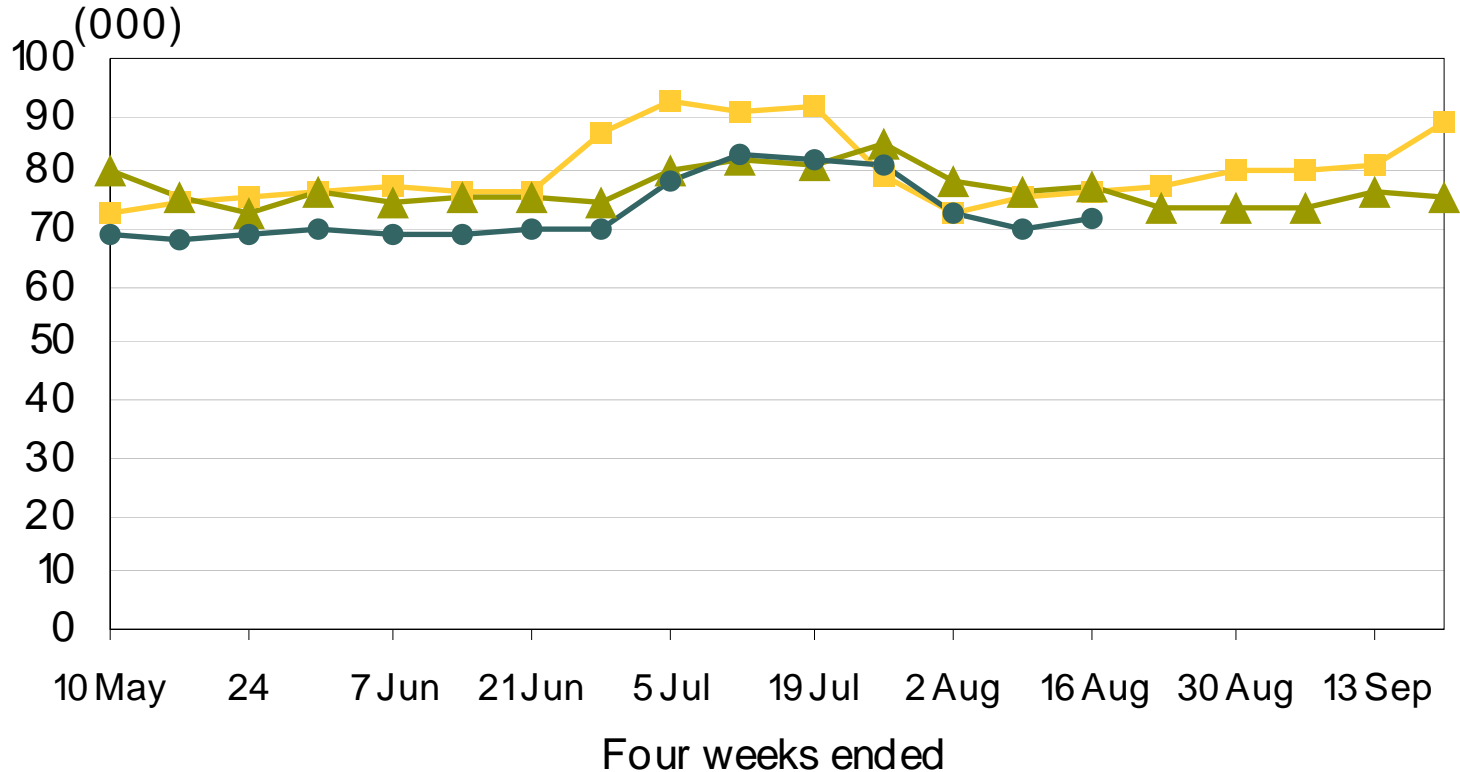


Four Weekly Departures

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Australia

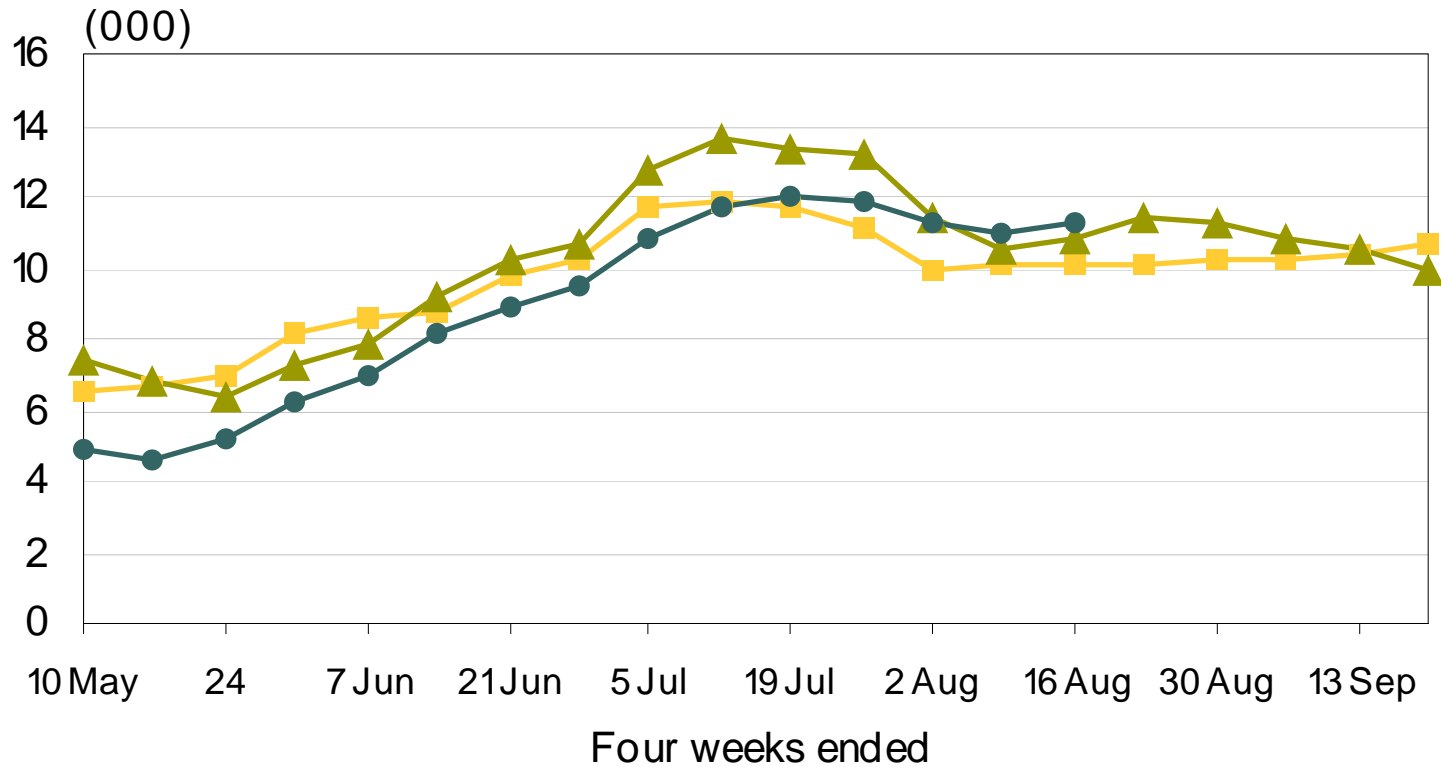


Four Weekly Departures

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Fiji

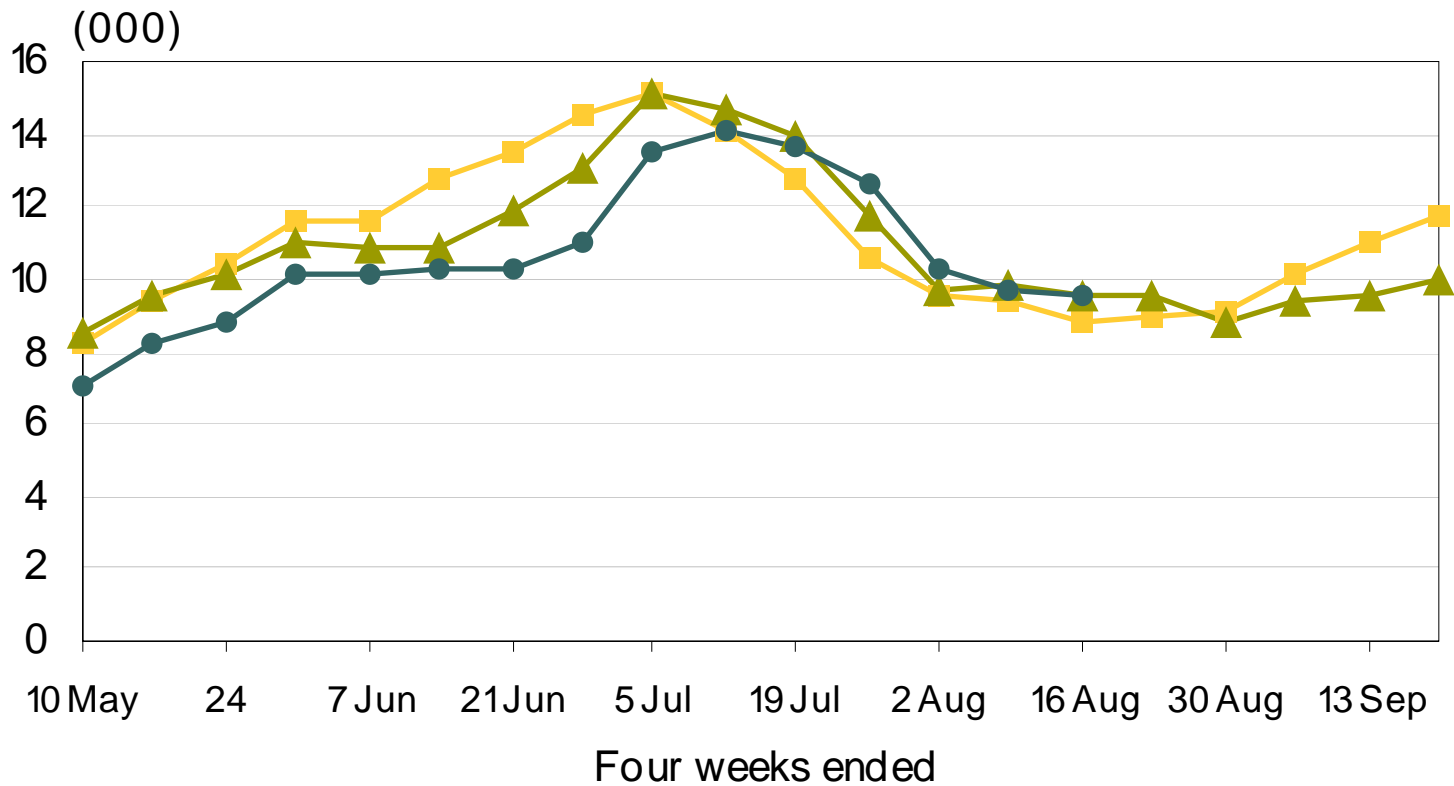


Four Weekly Departures

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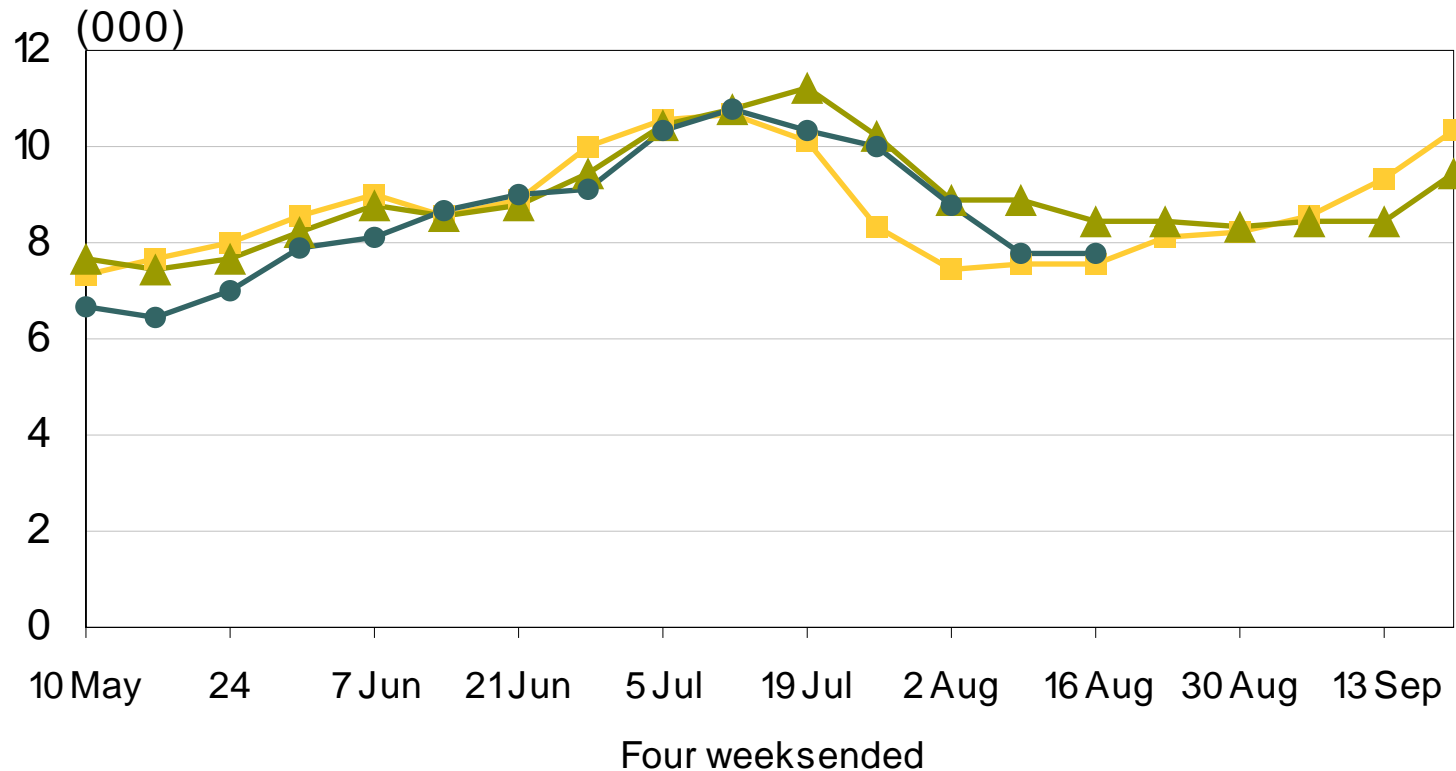


United Kingdom



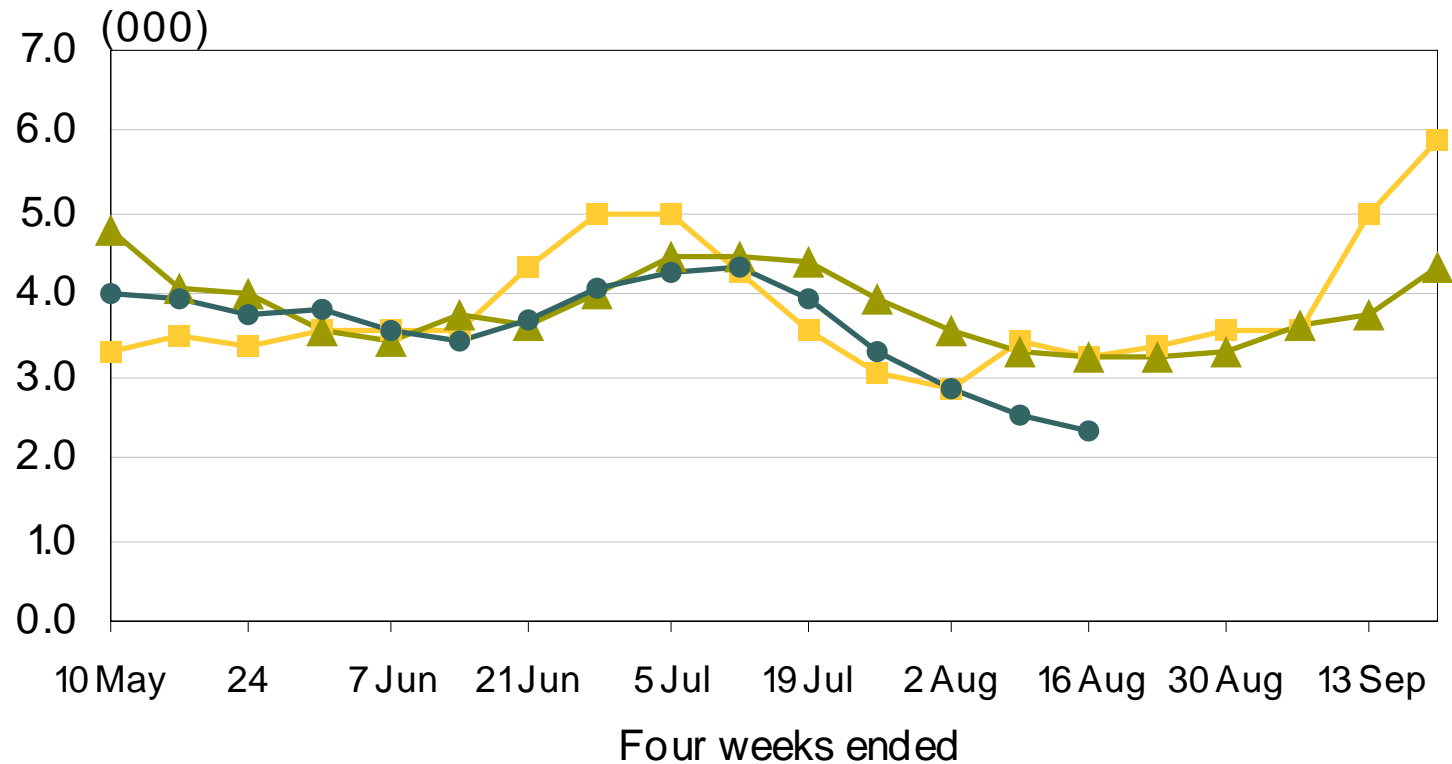


United States of America



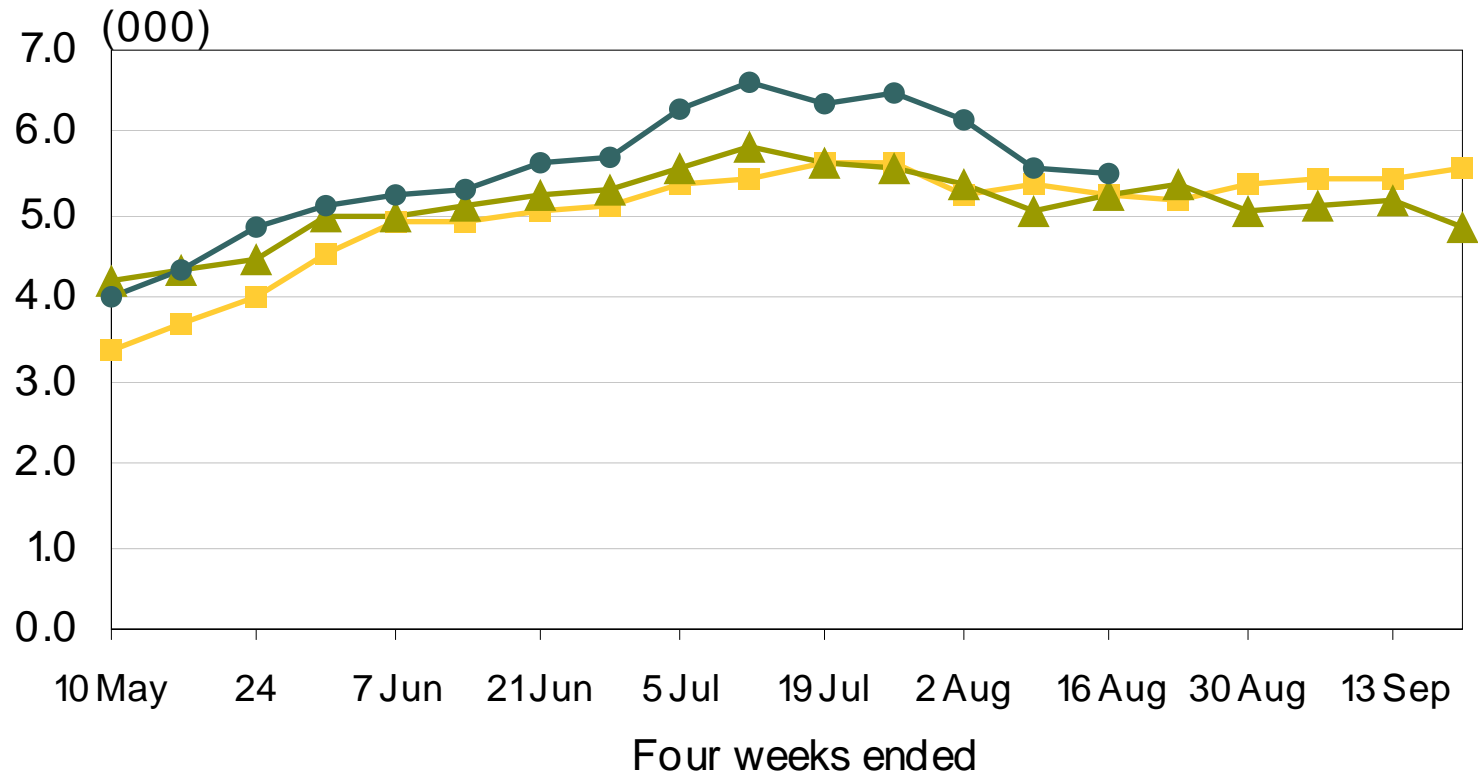


People's Republic of China





Cook Islands

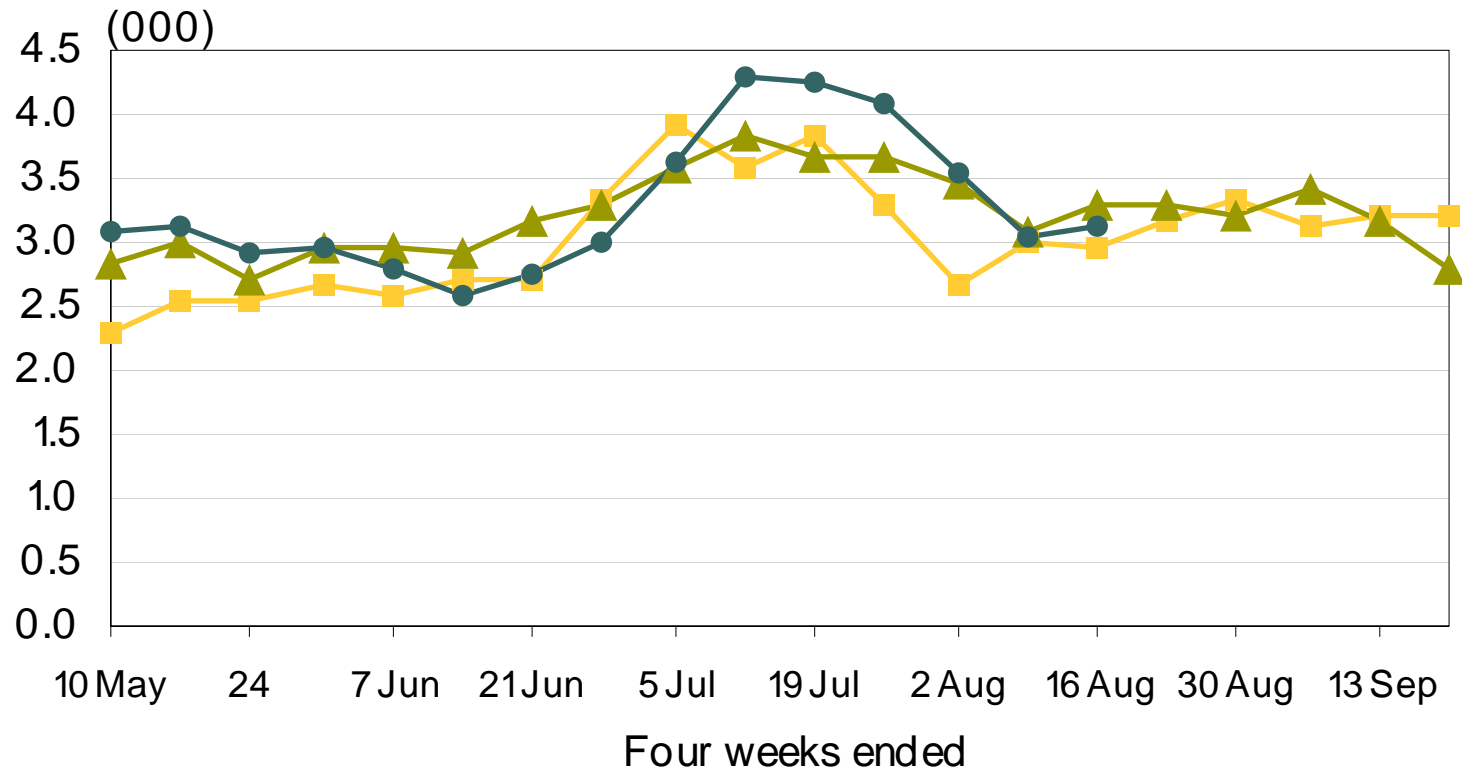


Four Weekly Departures

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Samoa





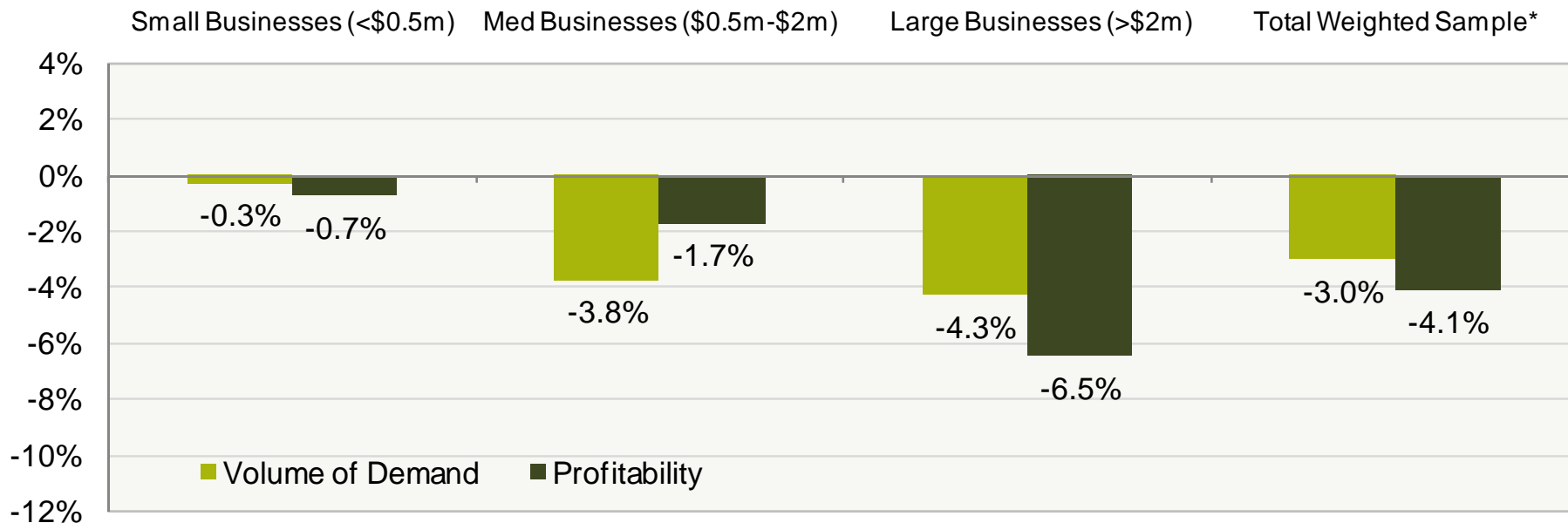
Tourism Industry Monitor

August 2009

Released: 13 August 2009

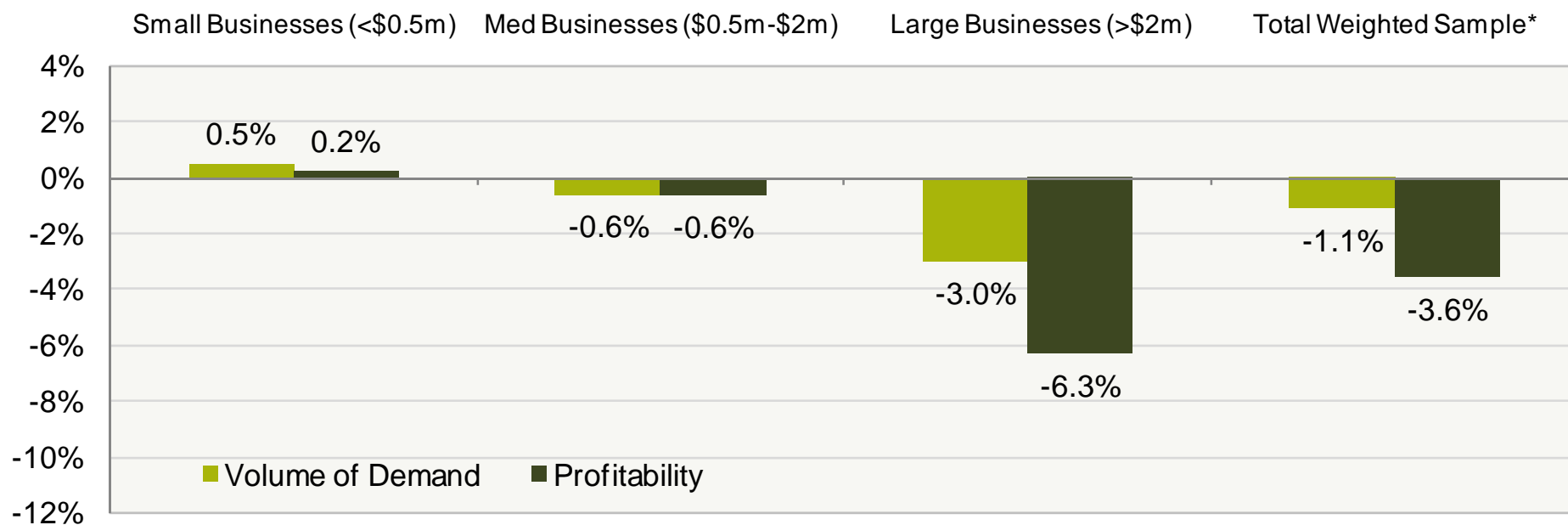


Demand and profitability – Past 3 months



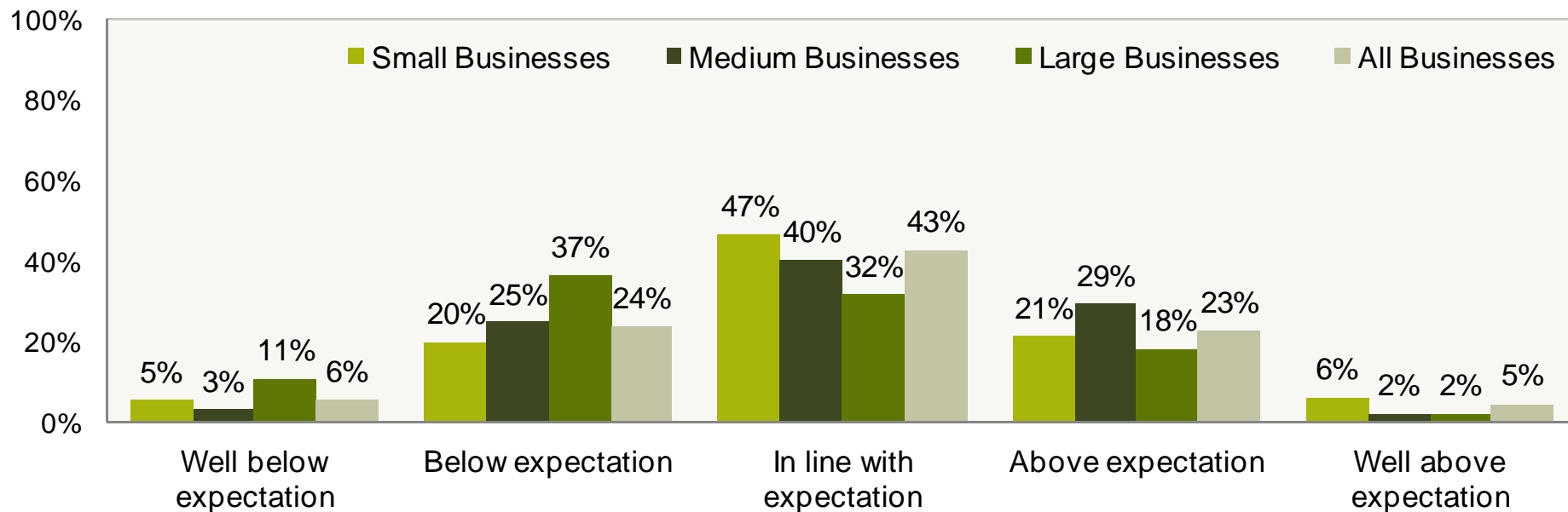


Demand and profitability – Next 3 months



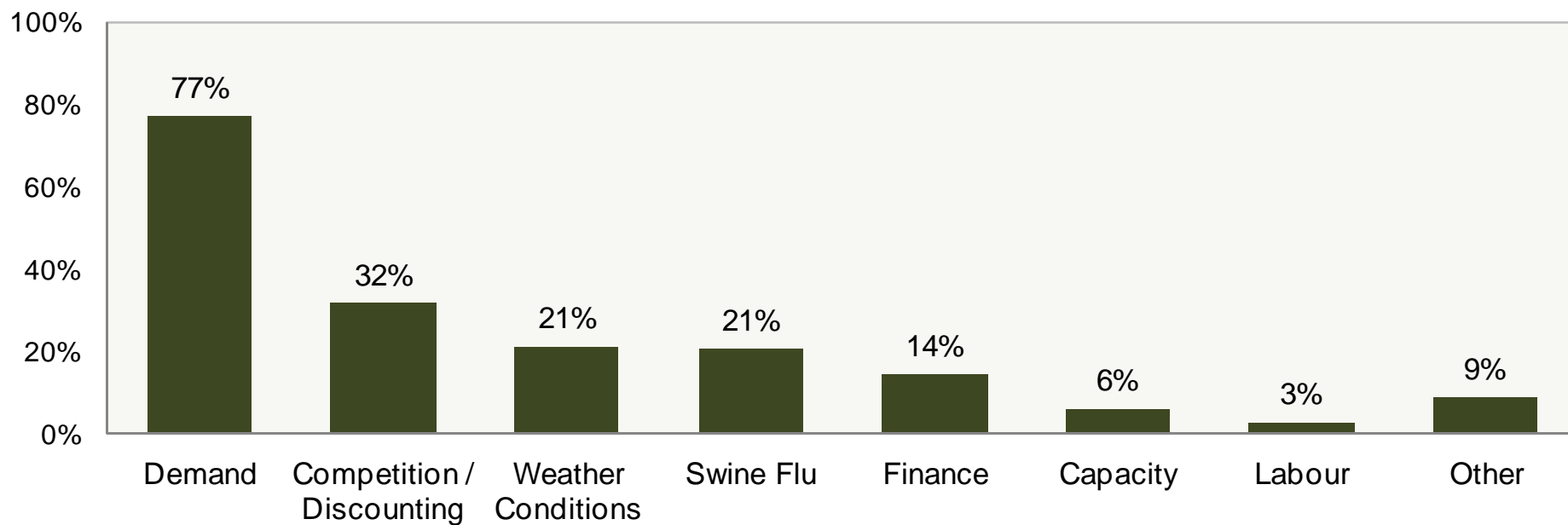


Past 3 months vs Prior expectations



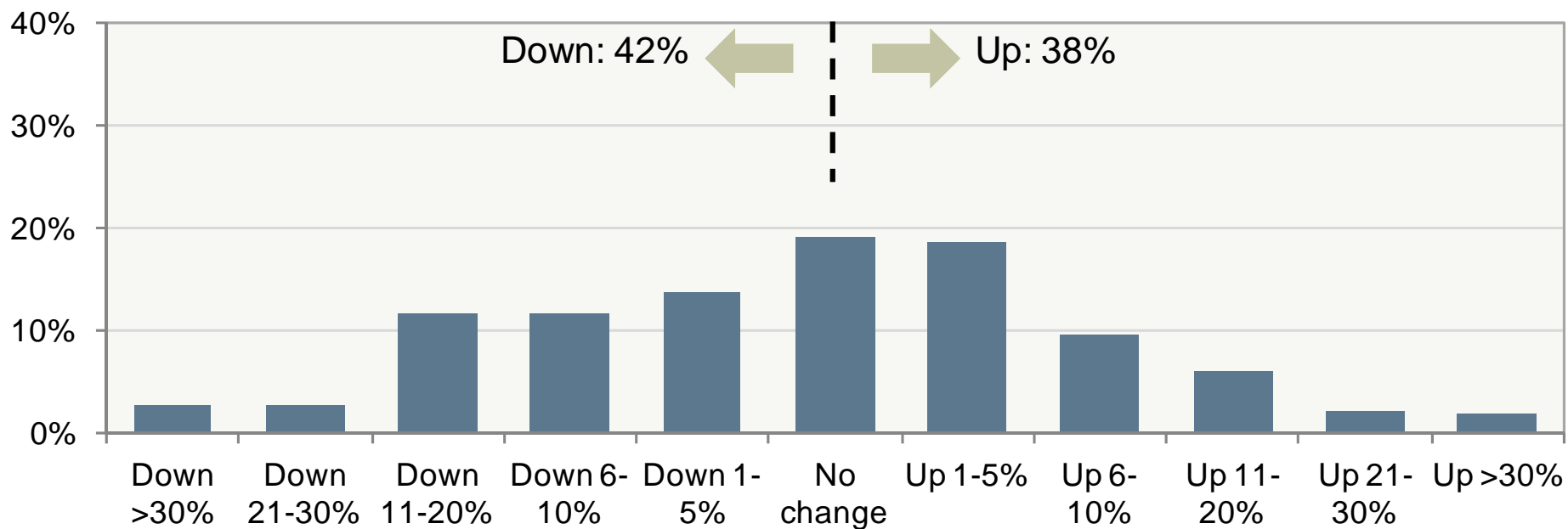


Factors for tourism businesses





Expected demand - next 3 months





New Zealand Tourism Forecasts 2009-2015

Released: 4 August 2009



- Difficult process this year
- Long-term information gathering approach, e.g TIM
- Market forecasts, with ‘Delphi-range’



Main Assumptions

- Global recession to ease over next 6-12 months, with recovery slow, cautious and uneven
(IMF and Economist Intelligence Unit)
- UNWTO expects a drop of international arrivals by 4-6% in 2009
- Influenza A (H1N1) expected to impact over next six months – but could be longer

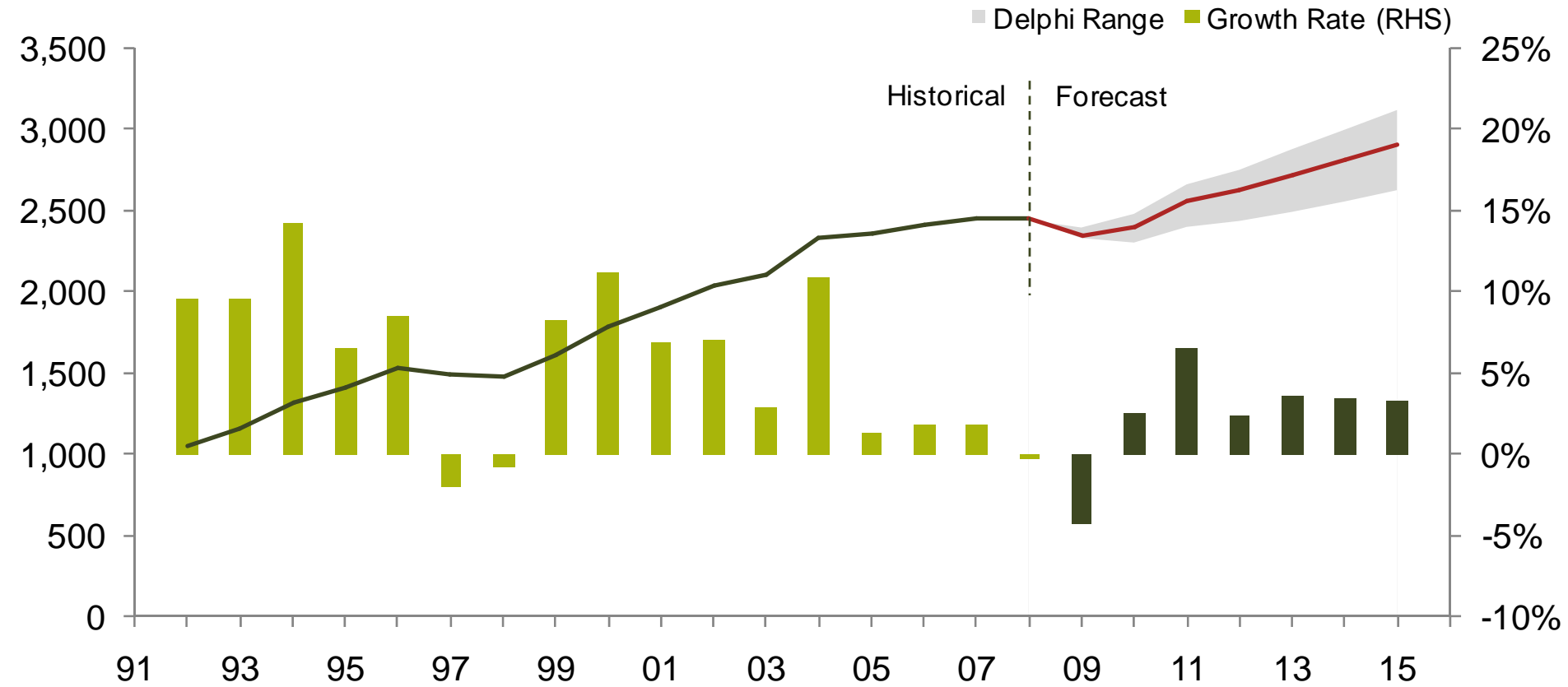


Other factors

- Significant market stimulation at present
- Change in consumer planning and booking patterns
- Move to short-haul travel as opposed to long-haul (a least in the shorter term)

Total Arrivals

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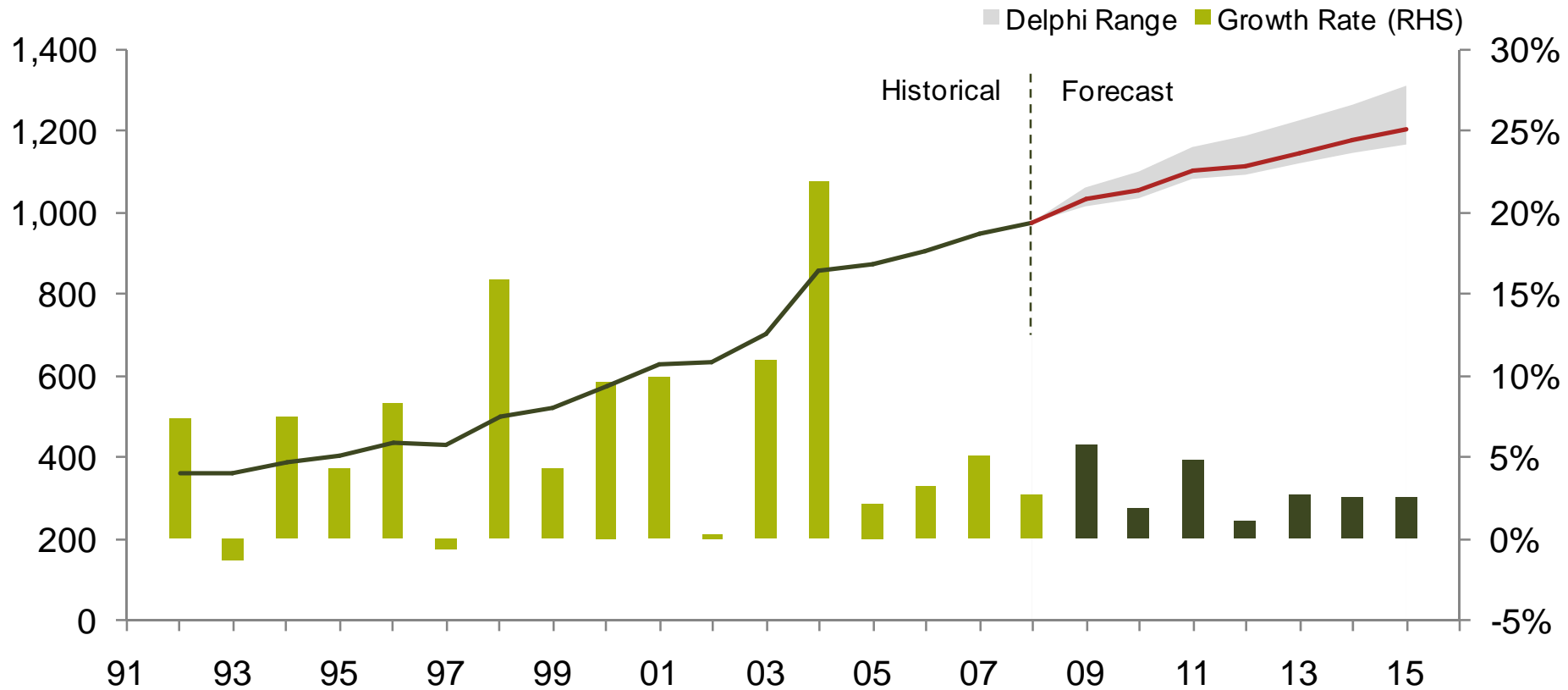




- Total growth over 2009-2015 – **18.6%**
- Average annual growth - **2.5%**
- Total arrivals – **2.9 million**
- Increase – **455,000**

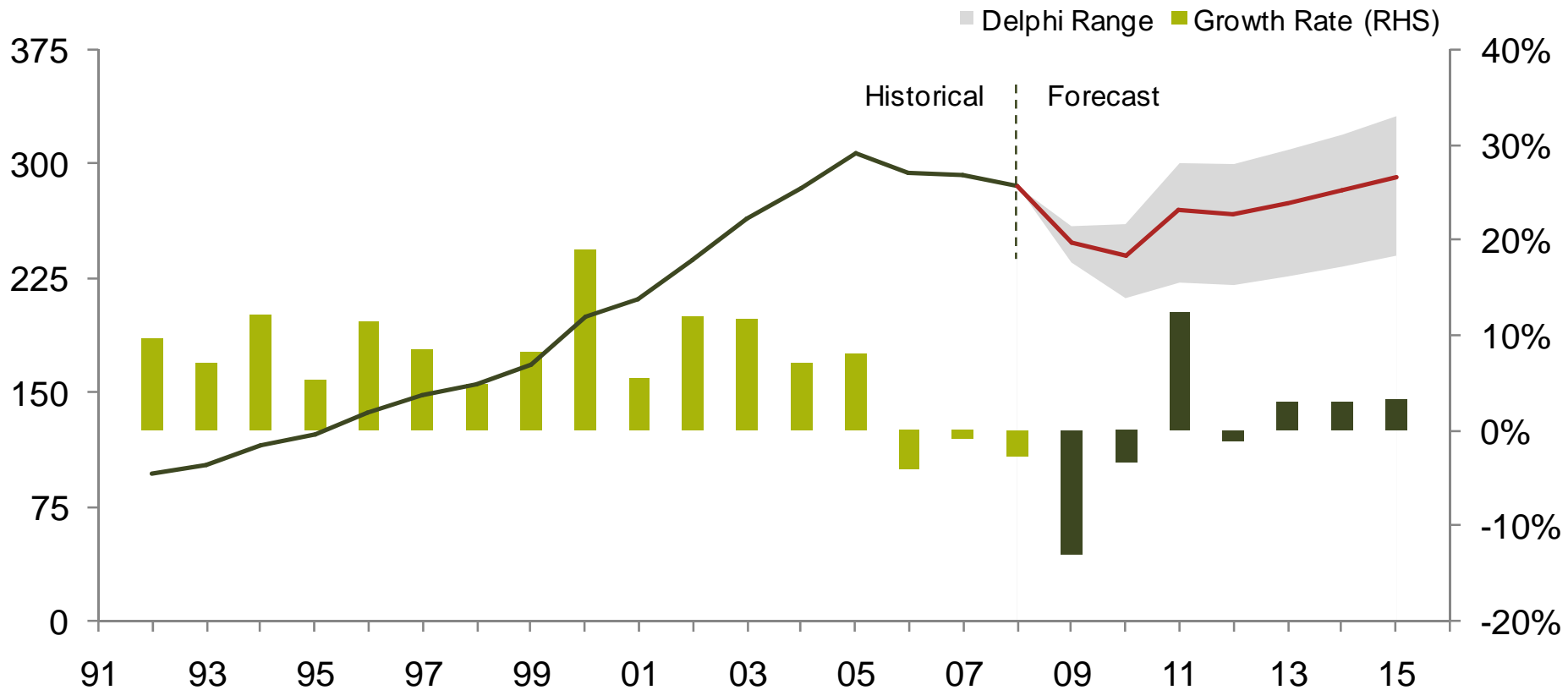
Australia

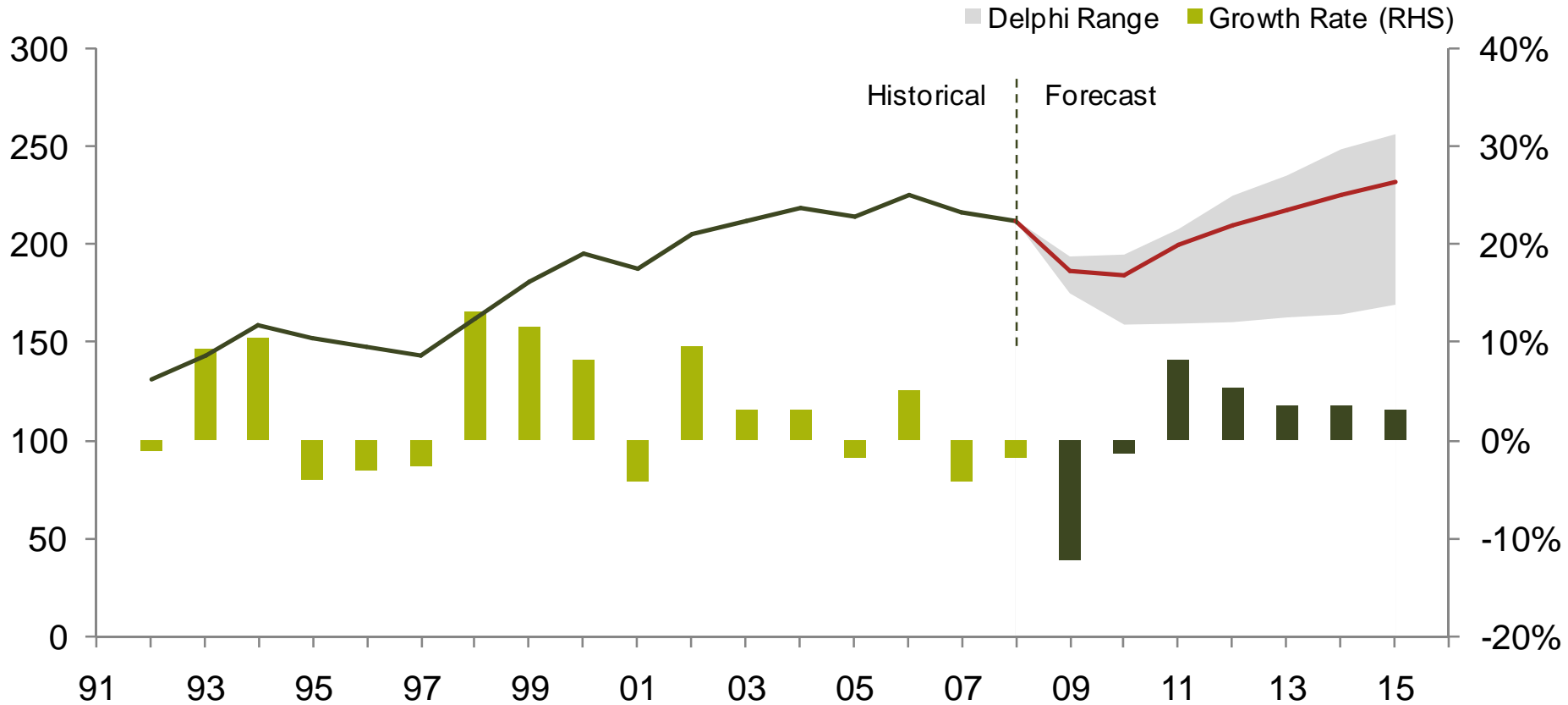
www.tourism.govt.nz
www.tourismresearch.govt.nz



United Kingdom

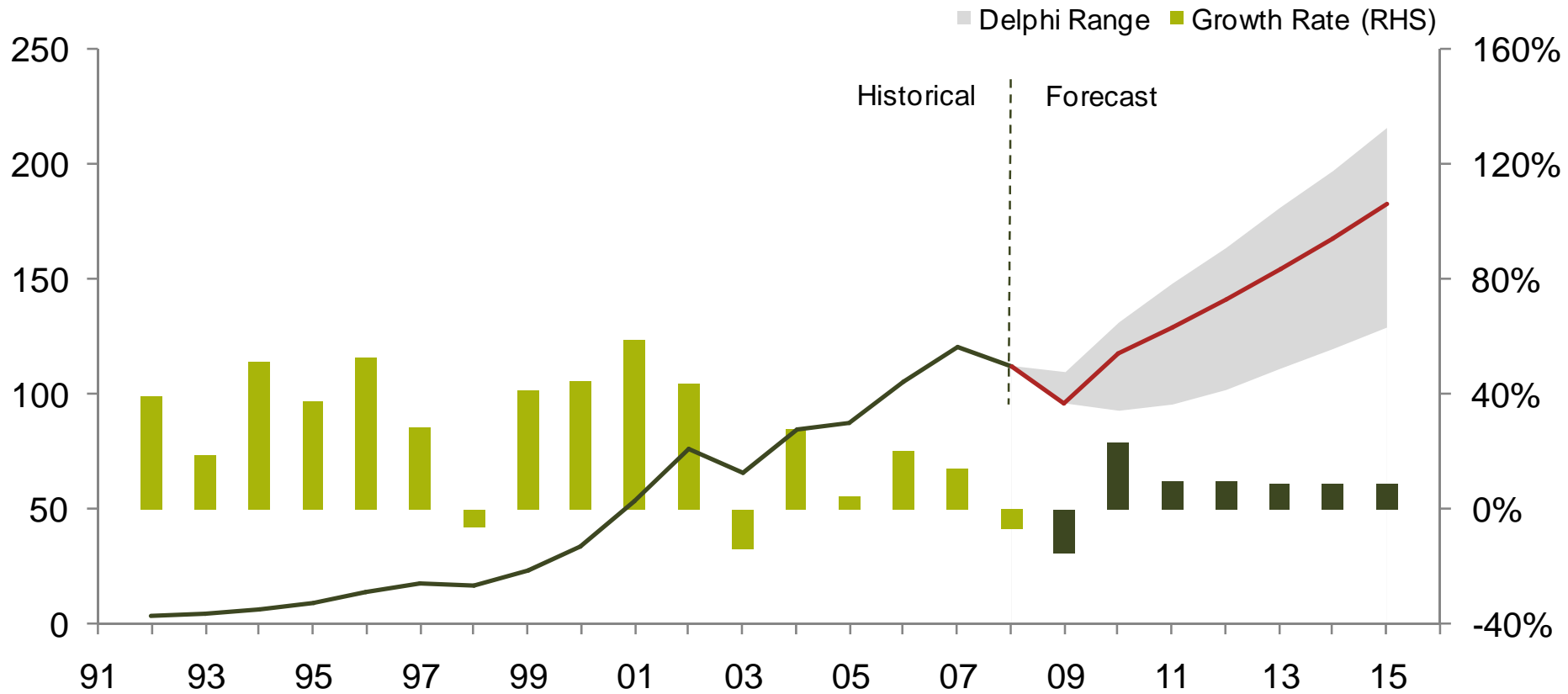
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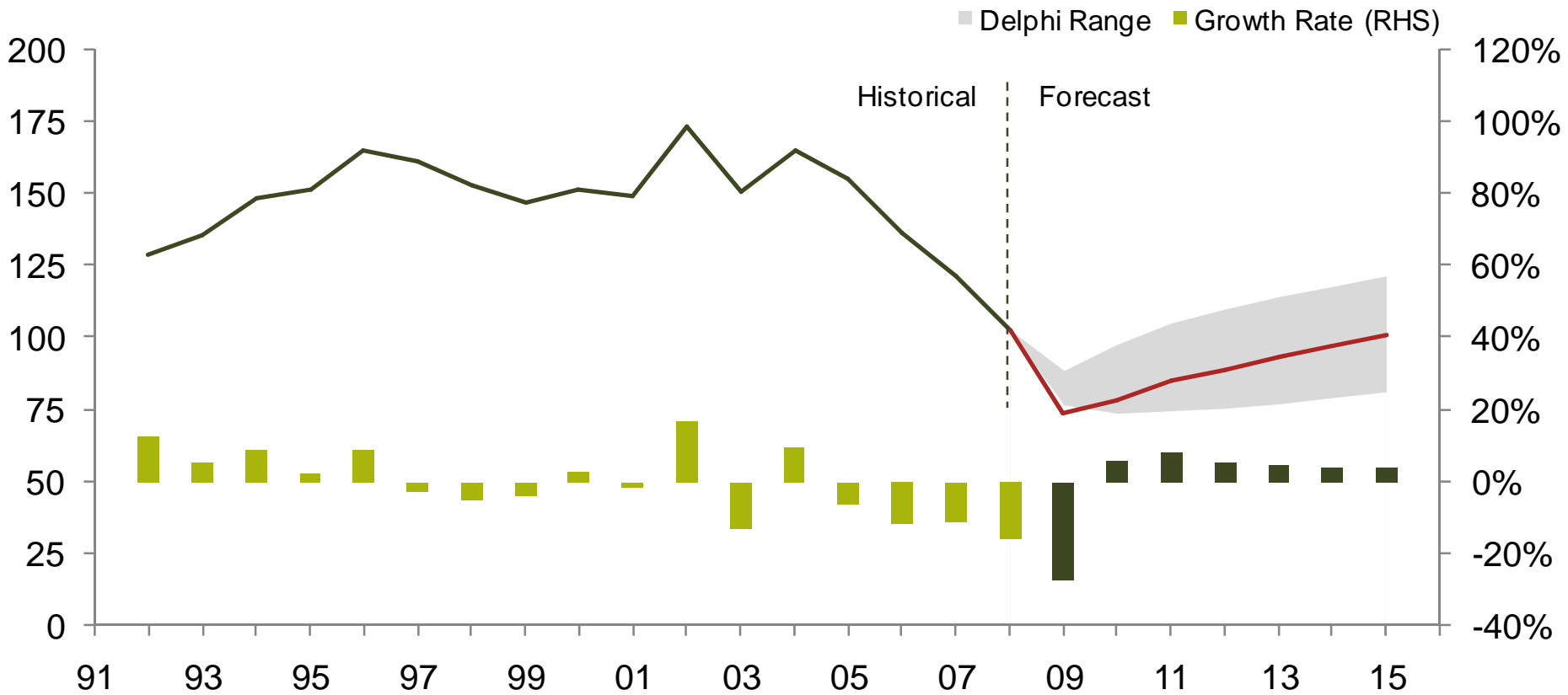
China

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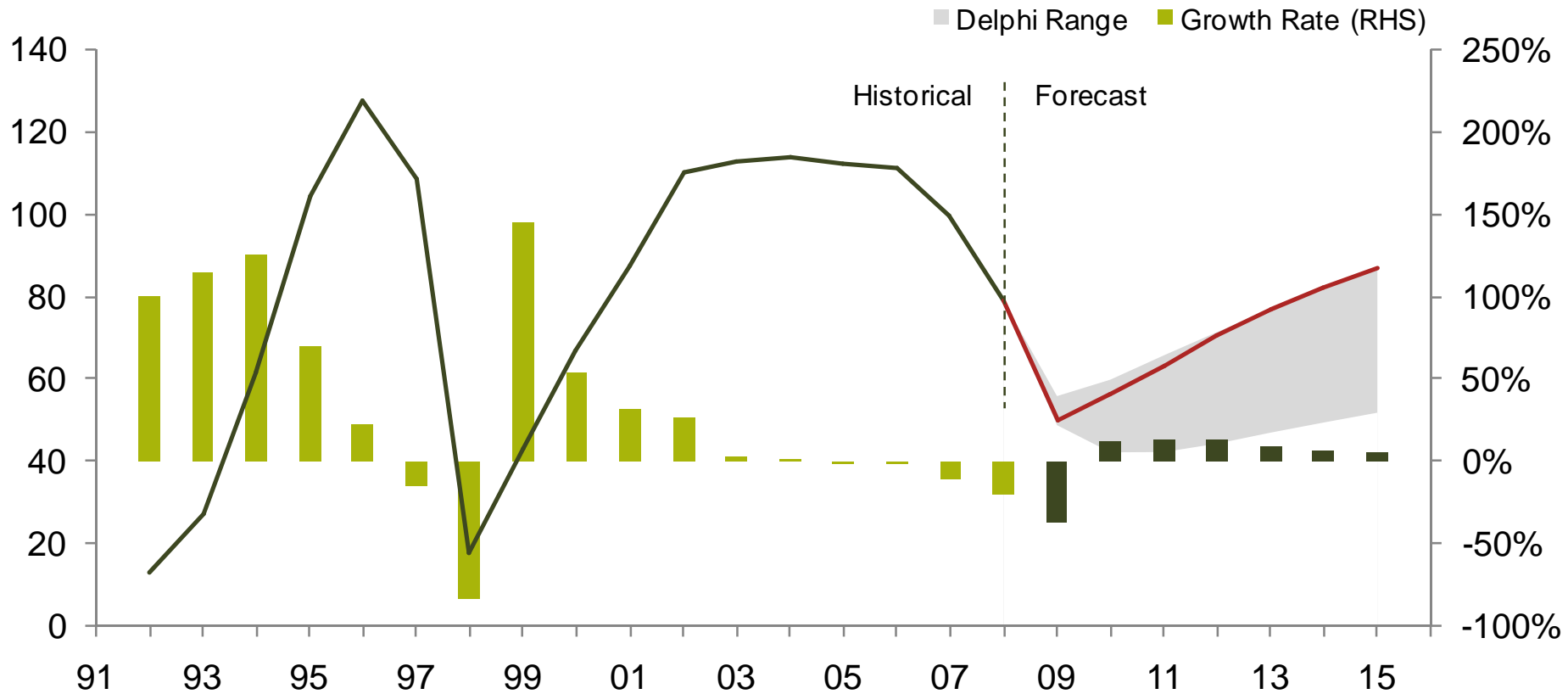
Japan

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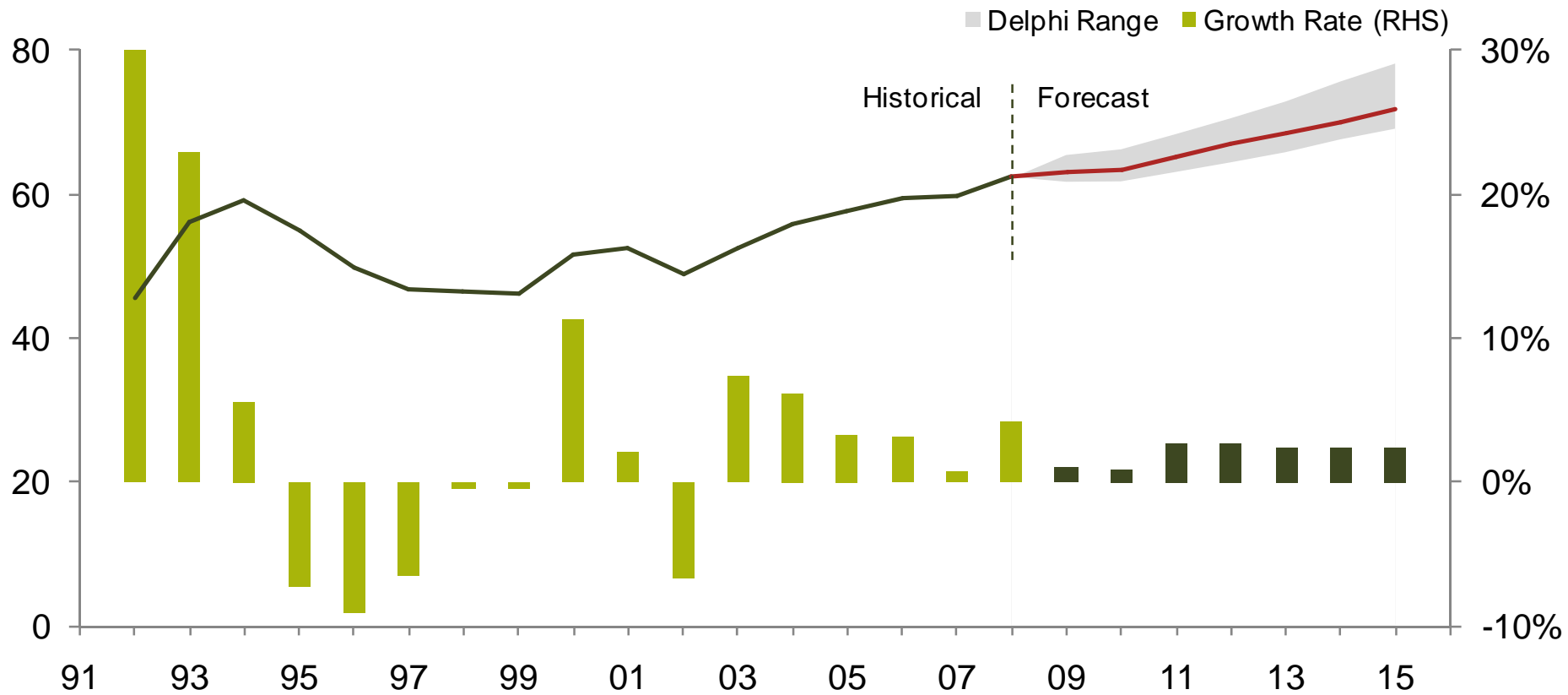
South Korea

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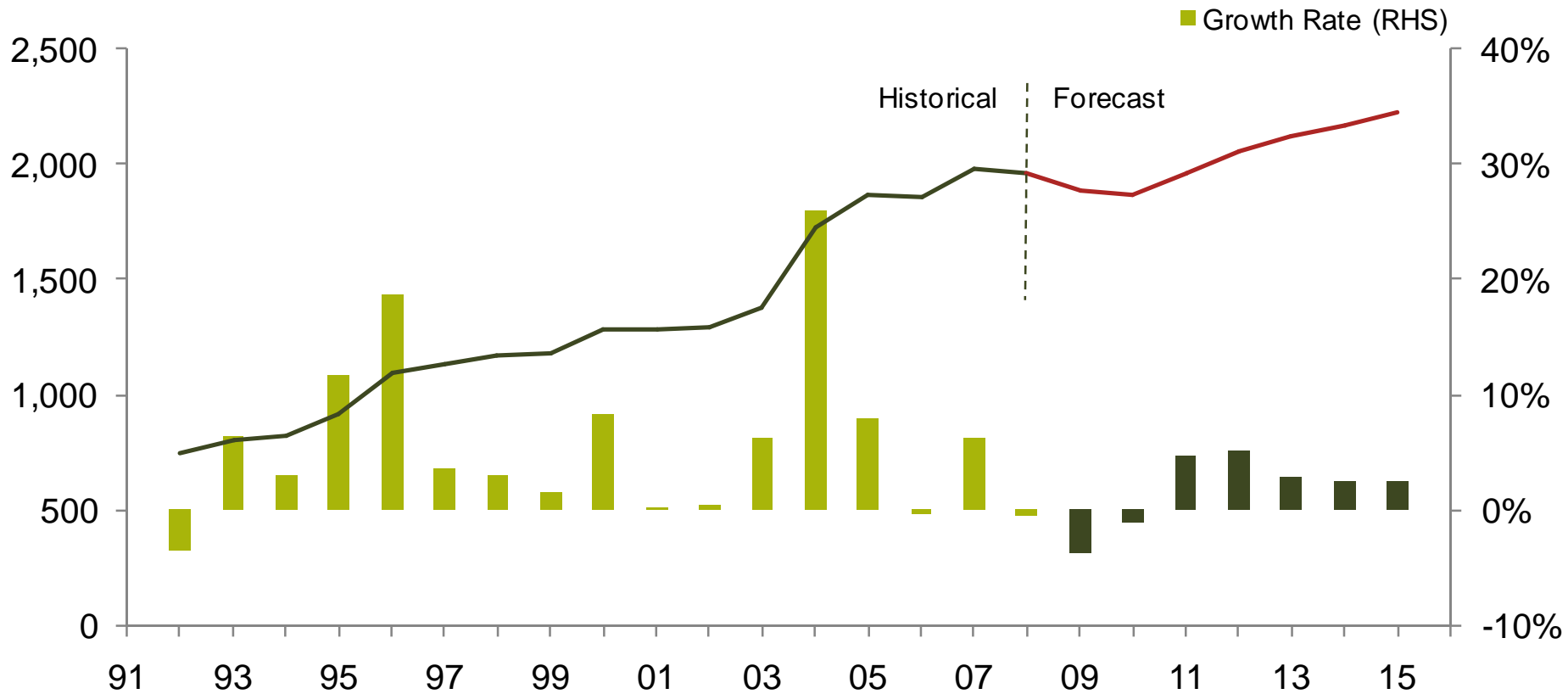
Germany

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Outbound by NZ Residents

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www.tourismresearch.govt.nz

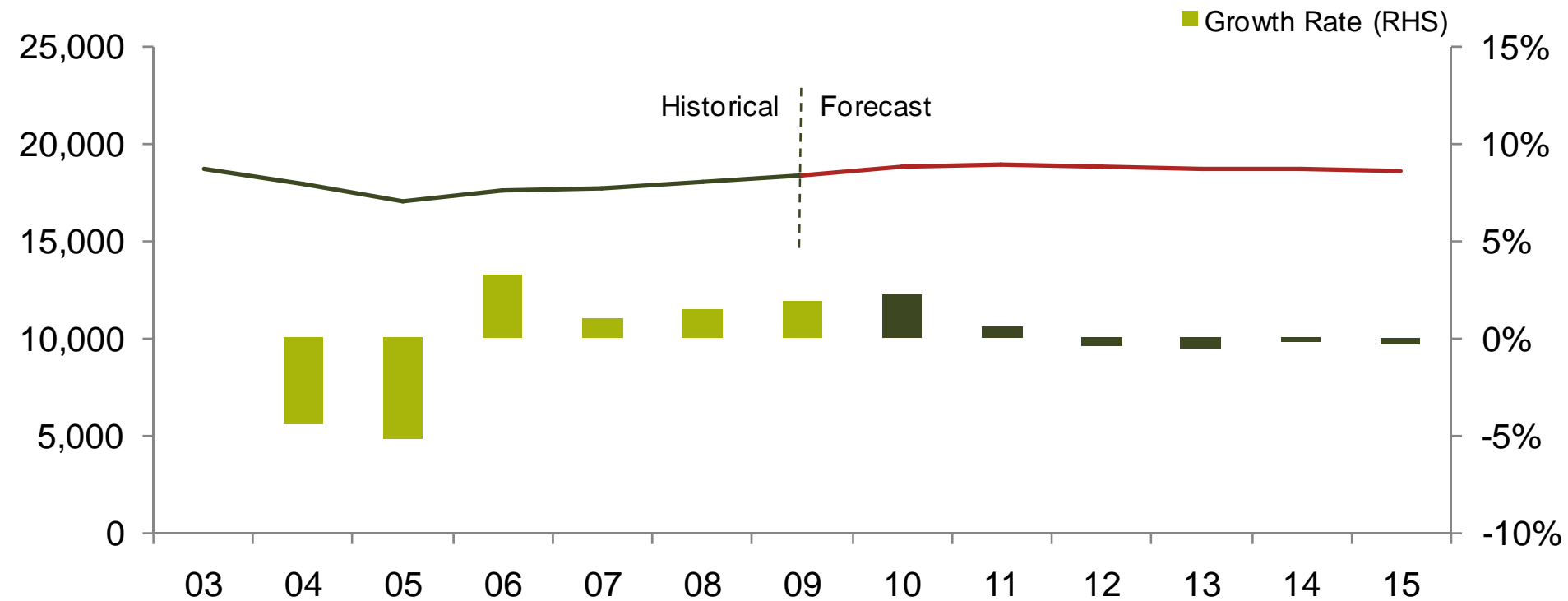




- Total growth over 2009-2015 – **13.3%**
- Average annual growth – **1.8%**
- Total departures – **2.2 million**
- Increase – **262,000**

Overnight Trips by NZ Residents

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Overnight Trips by NZ Residents

www.tourism.govt.nz
www.tourismresearch.govt.nz



- Total growth over 2009-2015 – **3.4%**
- Average annual growth - **0.5%**
- Total overnight trips – **18.6 million**
- Increase – **620,000**



Outbound Travel by New Zealand Residents

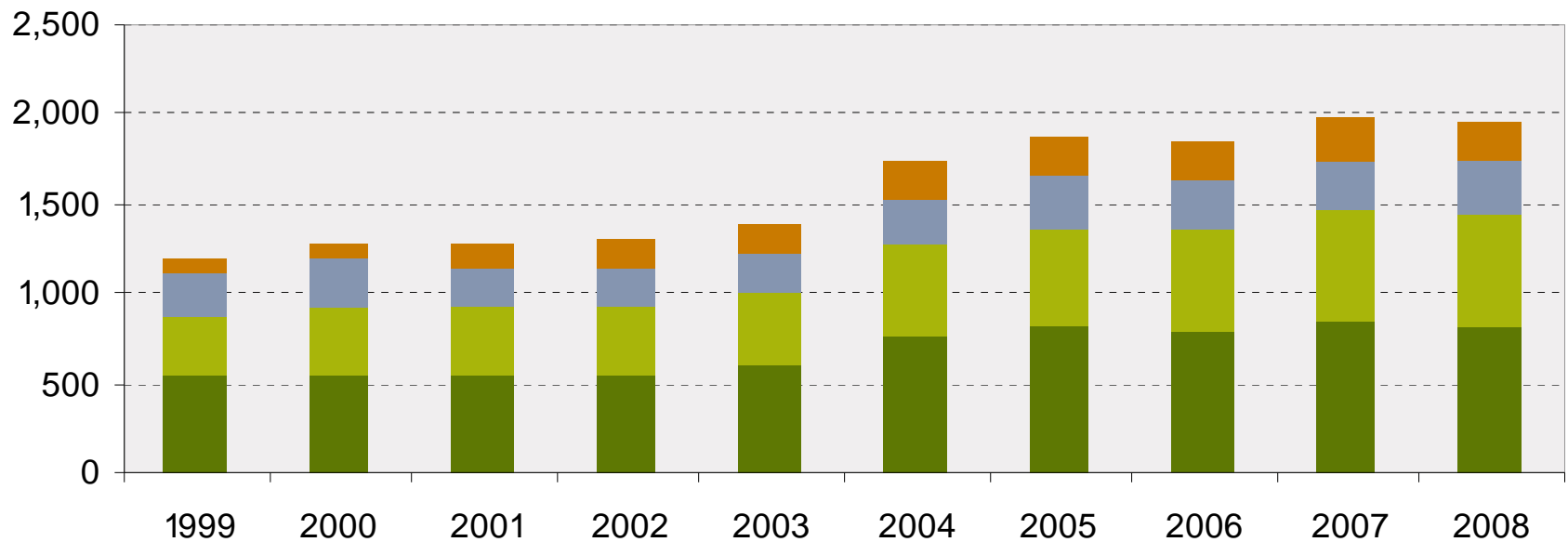
September 2009

Released: 2 September

Outbound Departures by Purpose

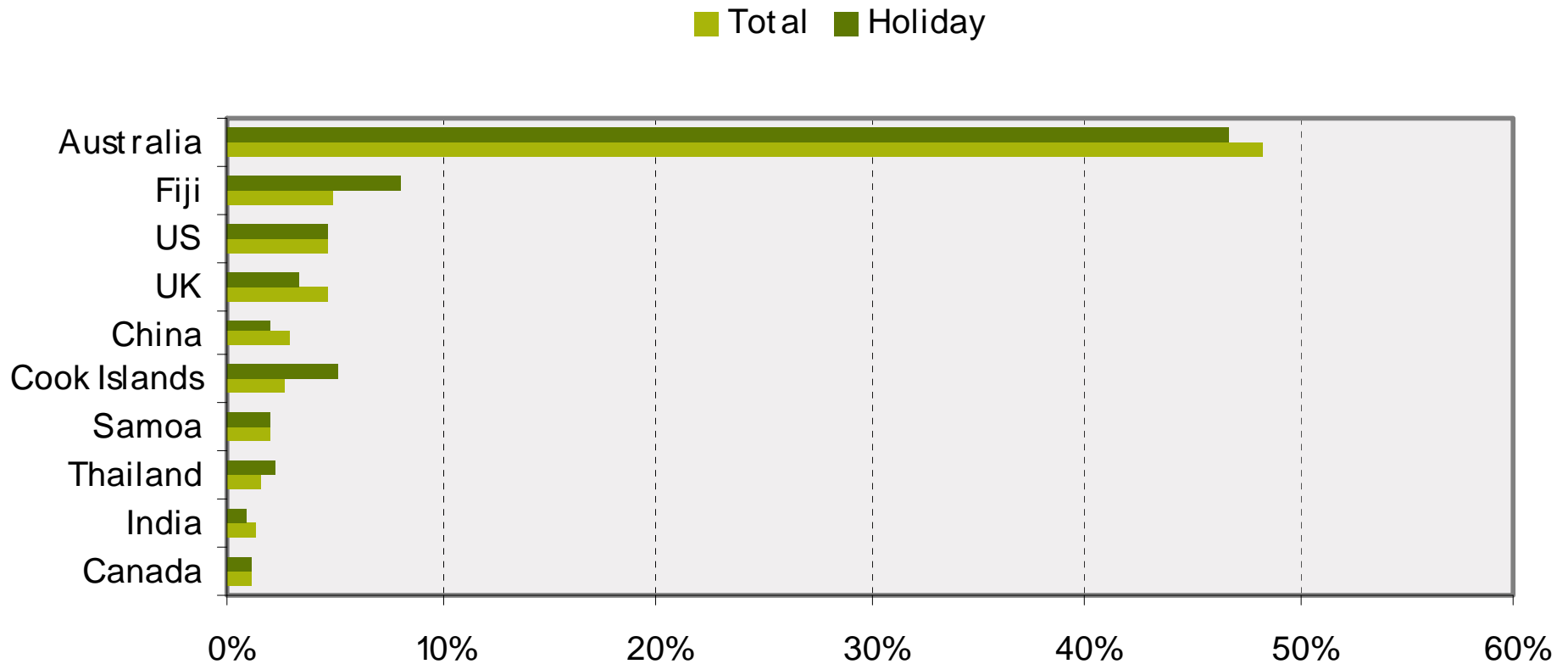
Departures(000s)

■ Holiday ■ VFR ■ Business ■ Other





Key Outbound Travel Markets, 2008

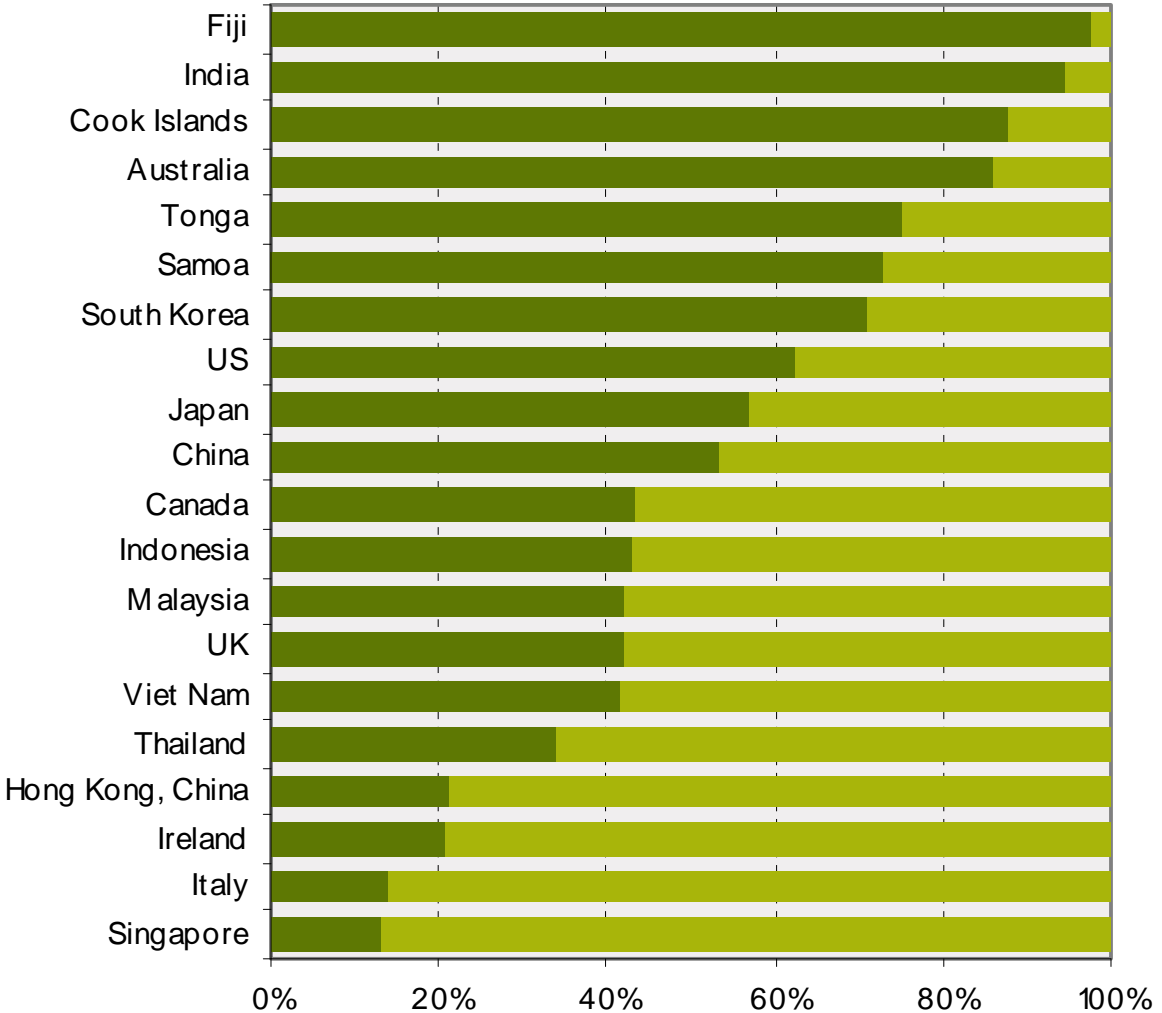


Primary and Secondary Travel Destination, 2007

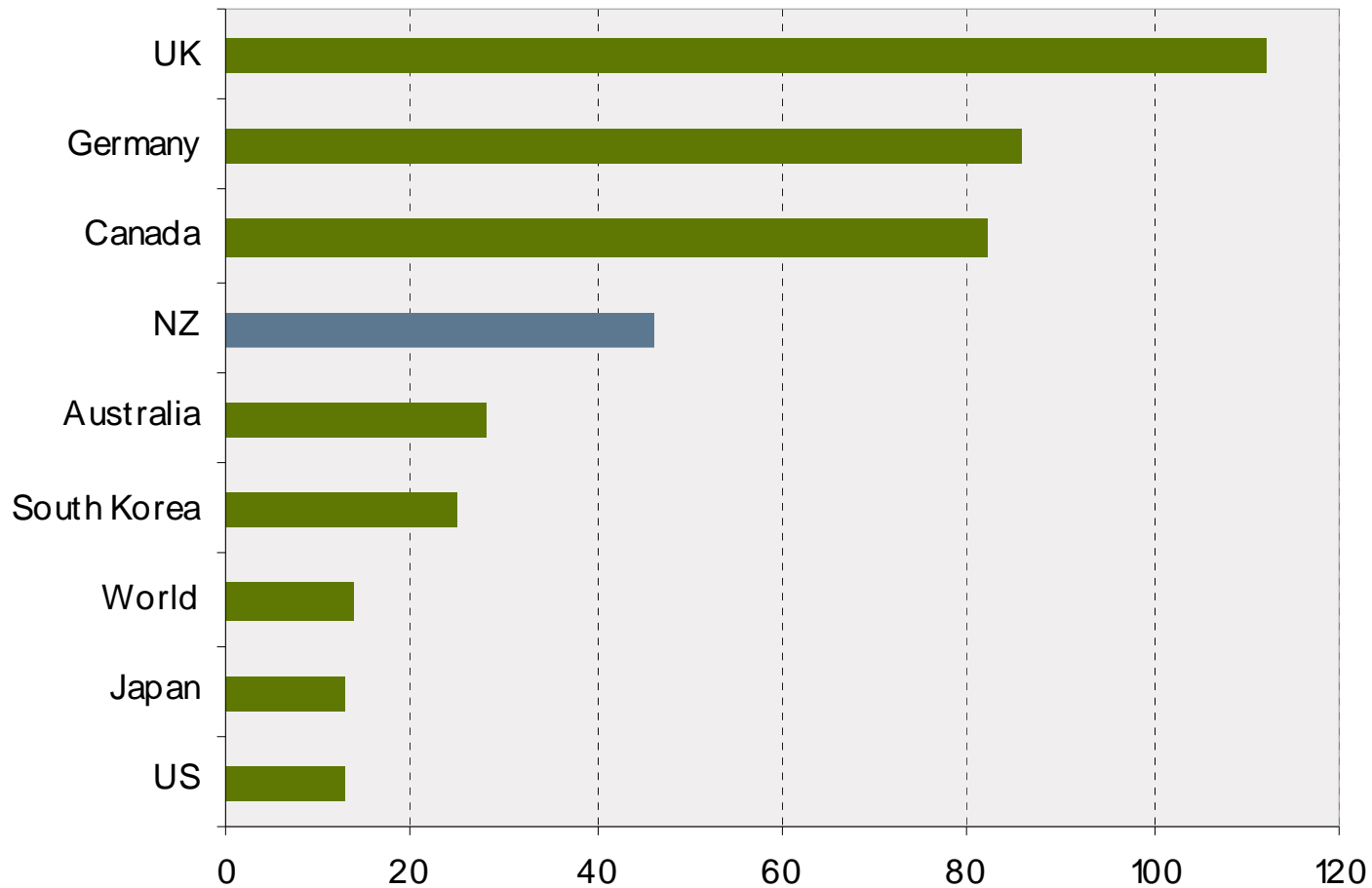
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■ Main Destination ■ Secondary Destination



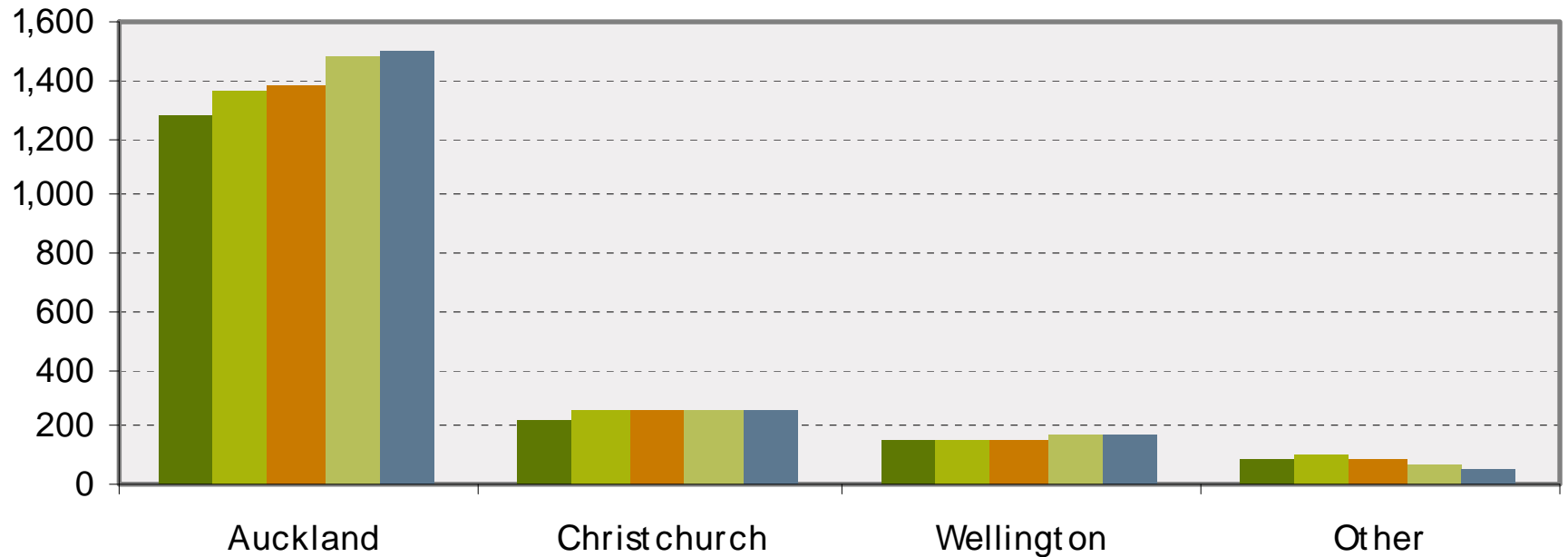
Propensity for International Travel



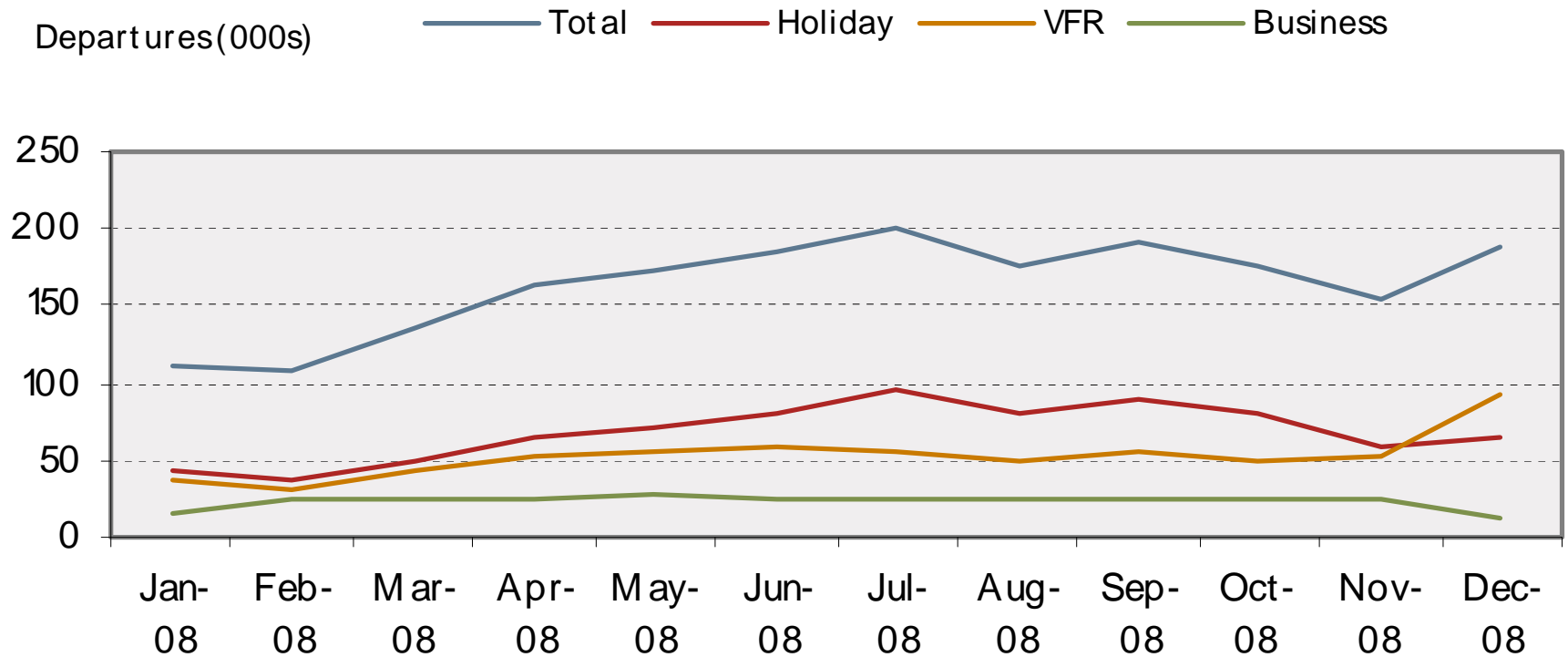
Outbound Departures by Airport

Departures(000s)

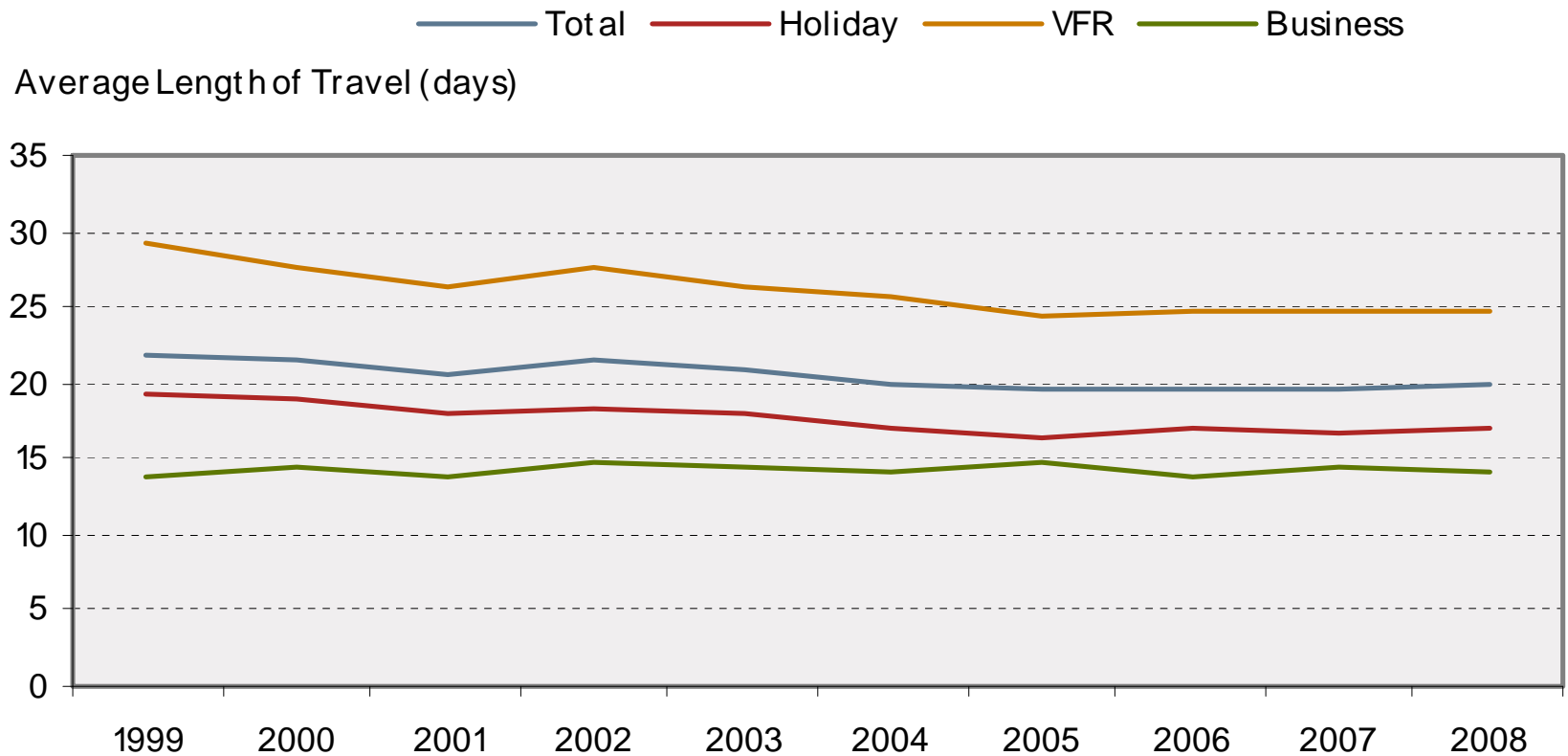
■ 2004 ■ 2005 ■ 2006 ■ 2007 ■ 2008



Outbound Travel by Month and Purpose of Travel

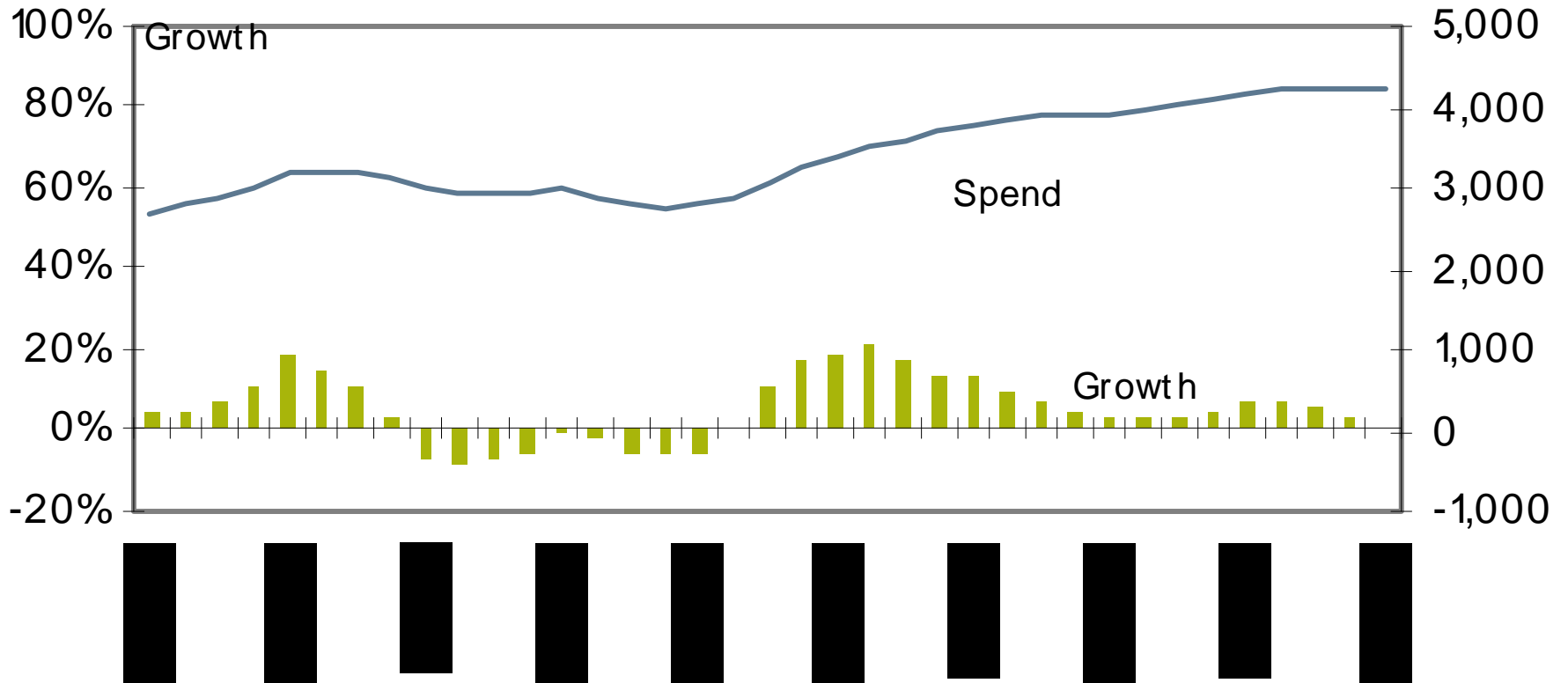


Average length of Outbound Travel



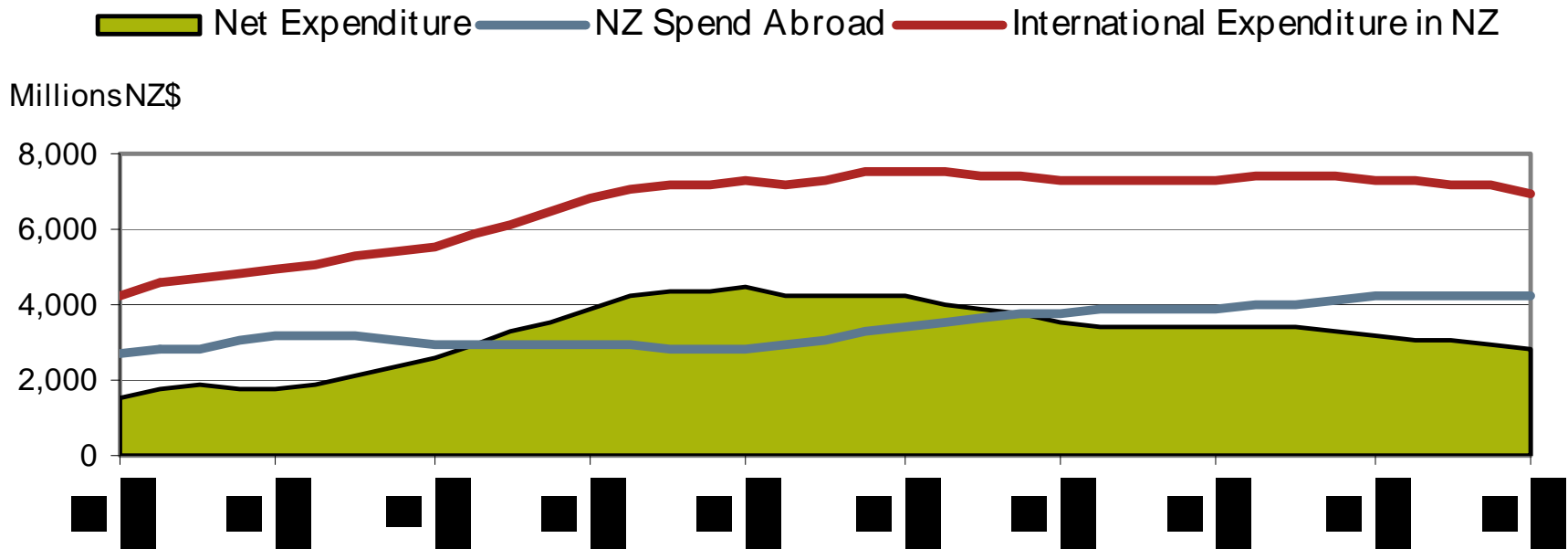


New Zealand Outbound Tourism Expenditure





Net Tourism Expenditure



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