



TOURISM LEADING INDICATORS MONITOR

SERIES 2009/10 **NOVEMBER 2009** NEW ZEALAND

This edition provides new data on:

- Inbound and Outbound Travel Oct 09
- Commercial Accommodation Sep 09
- International Visitor Expenditure YE Sep 09

It highlights that the tourism industry is gradually moving out of the trough, and how different regions have been impacted by international and domestic tourist demand in the past twelve-month period.

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CONTENTS

Commentary	2
Inbound Tourism	4
Outbound Tourism	6
Commercial Accommodation	8
International Visitor Expenditure	11
Domestic Tourism	12
Tourism Satellite Account	13
Tourism Forecasts	14
Trends and Patterns	15
Explanatory Notes	28

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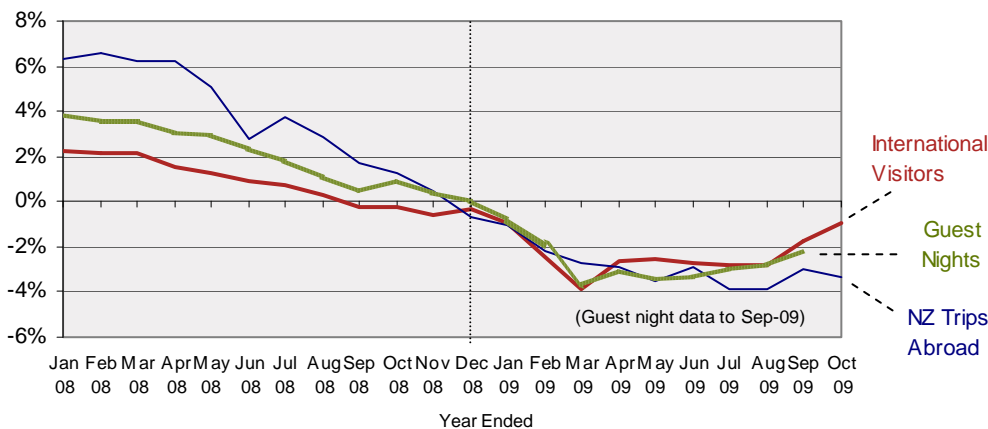
COMMENTARY

Tourism sector tracking past the worst

The latest tracking indicators show that the tourism industry continues to improve as it moves through the negative cycle caused by the global financial crisis and Influenza A (H1N1).

International visitor arrivals appear to have pasted the trough, with arrivals tracking at just 1% down in the year to October 2009, with the months of September and October being up 9.3% and 7.7% respectively. Outbound travel by New Zealand residents remains soft, down 3.3% on last year while commercial guest nights were also improving, up to -2.2% for the year ended September 2009 (refer Figure 1).

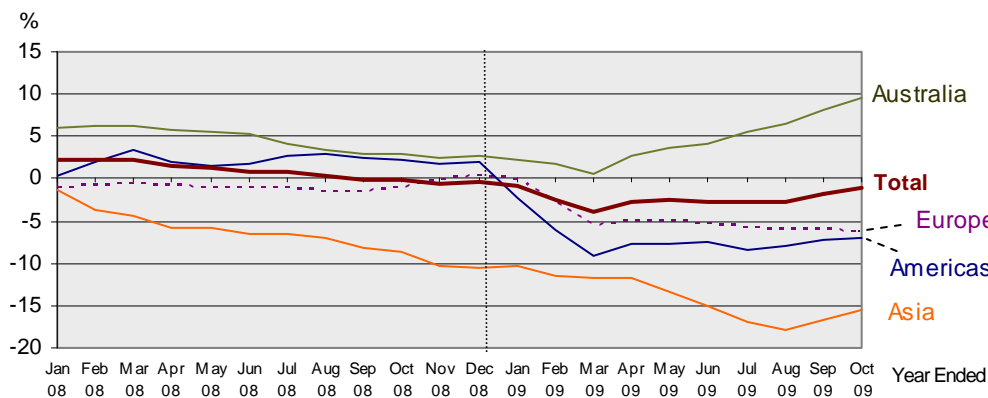
Figure 1: Inbound Travel, outbound Travel and Commercial Guest Nights - Rolling Annual Growth Rates, Jan08-Oct09



International visitor arrivals have been improving over the last two months (Sep-Oct), signalling the beginning of recovery.

Within the overall picture of visitor arrivals, however, there are considerable differences in the performance of regional markets. The strength of the Australian market has been particularly important, especially over the past seven months when this market stepped up a gear. In the year to October, visitor arrivals from Australia increased by 94,000 or 9.7% which cancelled out the most of the decrease of 118,000 or 7.9% in all other markets (refer Figure 2). Over the past year Europe arrivals were down 6.3% (32,000), the Americas down 7.0% (21,000) and Asia down 15.5% (72,000).

Figure 2: International Visitor Growth - Rolling Annual Growth Rates, Jan08-Oct09



Australian market has been the major driver of inbound tourism and offsets weakness in other markets over the last seven months

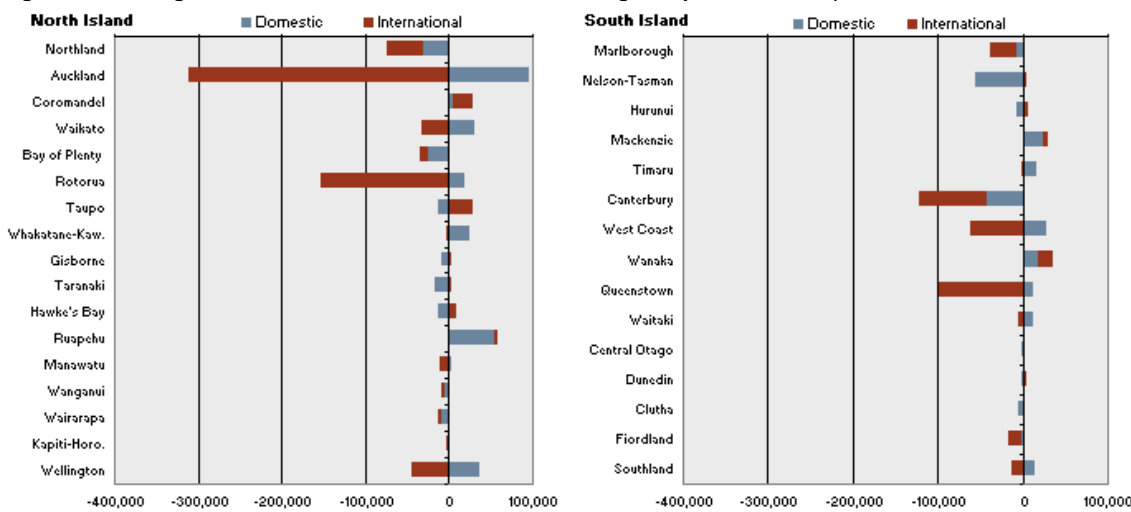
With this strong growth of the Australian market there has been a sharp rise in the Australian share of total arrivals to reach 43.5% at present, up from 39.3% last year and 31.3% in 2002. By contrast, the share of arrivals for Asian markets has reduced considerably to 16.1% at present, down from 18.9% last year and 26.0% in 2002. Europe (19.7%) and the Americas (11.3%) have lost some share as but to a lesser extent, by about one percent point.

COMMENTARY

Total commercial guest nights for the year ended September 2009 were down by 2.2%. This was driven by a fall in international guest nights (down 5.9%) that was partly offset by domestic guest nights that increased by 0.5%. The fact that total arrivals had fallen (1.0%) less than international nights (5.9%) is not unexpected given that we received more short-stay Australian visitors and fewer visitors from other markets that stay longer and are more likely to use commercial accommodation.

An effect of the change in composition of our international markets and the relative stability of domestic guest nights is that there has been a considerable difference in the changes to regional guest nights over the past year (refer Figure 3).

Figure 3: Change in International and Domestic Guest Nights by RTO, YE Sep-2009



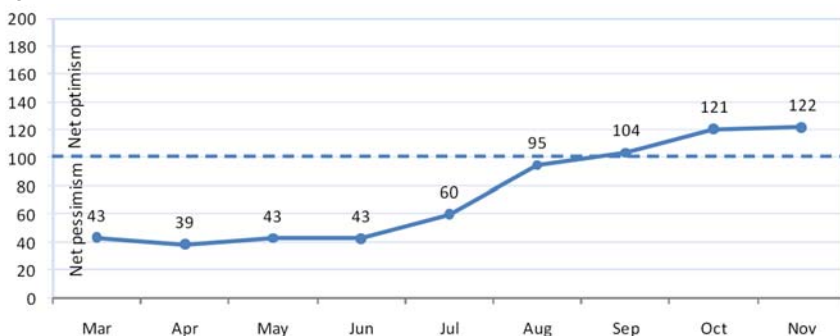
Decrease in International guest nights contributed to the weak performances in some RTO areas.

This highlights that the biggest impacts have been felt in regions with high exposure to international markets and that the impact of the tourism downturn has been uneven across the country. For instance, Auckland and Rotorua experienced large falls in international guest nights which is associated with sharp falls in Asian travellers to these regions. Even though domestic nights increased, the net effect was significantly fewer guest nights for both regions.

In the South Island, the pattern is the same with the regions that rely on international tourism impacted the most (e.g. Canterbury, West Coast and Queenstown), whereas the reduction of guest nights in other regions is a mix of smaller ups and downs.

To place the improved sector data in context, it is significant that the sentiment of tourism industry operators is also improving, with confidence levels being positive for the third successive month (refer Figure 4). Looking towards, it is reassuring that all main indicators are showing that the sector has pasted the worst of the downturn of the past year.

Figure 4: Tourism Business Confidence Index, March-November 2009



Tourism business confidence continues to improve with more positive outlook for the next three months.

1. INBOUND TOURISM

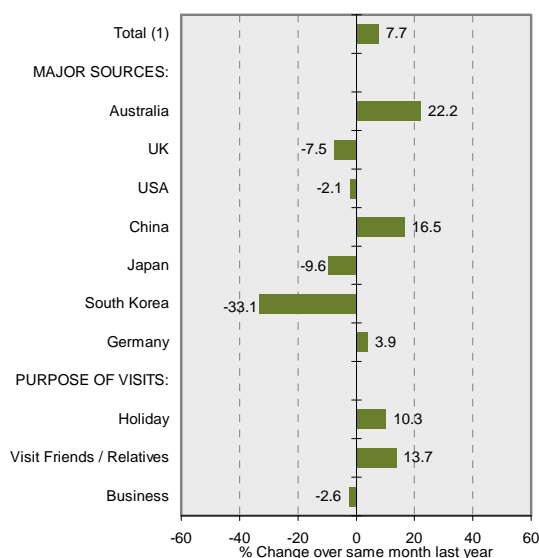
International Visitor Arrivals, October 2009 - In the month of October 2009 there were 187,400 international visitor arrivals, up by 7.7% (13,400) compared to October 2008. This is the highest visitation for an October month for the Australian and total market.

Markets – Visitors from Australia (up 15,900 or 22.2%) recorded the largest increase in October 2009. This was followed by China (up 1,100 or 16.5%), Hong Kong (up 420 or 28.3%), Spain (up 350 or 32.9%) and Thailand (up 340 or 20.5%).

In contrast, there were fewer visitors from South Korea (down 1,900 or 33.1%), the United Kingdom (down 1,300 or 7.5%), South Africa (down 690 or 40.1%), Japan (down 650 or 9.6%) and the United States (down 300 or 2.1%).

Purpose - There were more visitors on holiday (up 8,400 or 10.3%) and visiting friends and relatives (up 6,800 or 13.7%) in October 2009 compared to October 2008, while there were fewer visitors on business (down 560 or 2.6%).

Figure 1a **Growth Rate of International Visitor Arrivals (Month of October 2009)**



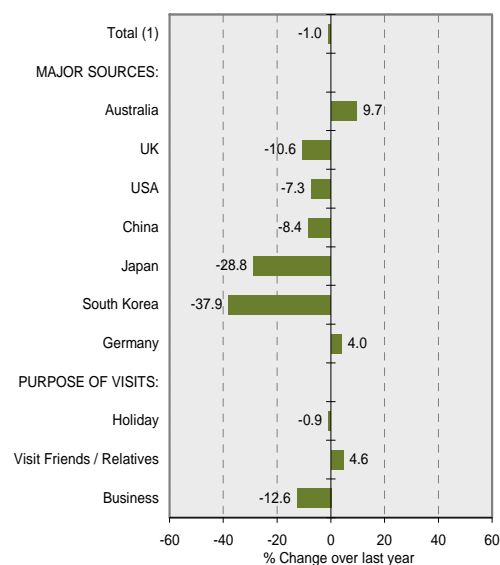
Duration – In October 2009, the average length of stay of visitors was 21.4 days, down 0.1 day from October 2008. The total number of visitor days increased by 7.7% (286,000) to 3.43 million.

Flights – There were 2,498 flight-arrivals in October 2009, 66 flights or 2.7% more than in October 2008.

Annual Arrivals – For the year ended October 2009, there were 2.439 million international visitor arrivals, down by 24,400 or 1.0% on the previous year.

Total visitor days were down by 4.6% to 49.04 million, with the average length of stay down 0.7 day to 20.2 days.

Figure 1b **Growth Rate of International Visitor Arrivals (Year Ended October 2009)**



1. INBOUND TOURISM

Table 1a International Visitor Arrivals (Month)

OCTOBER MONTH	International Visitor Arrivals			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
Total (1)	179,947	173,938	187,372	-3.3	7.7
MAJOR SOURCES:					
Australia	71,691	71,760	87,676	0.1	22.2
UK	18,400	17,976	16,629	-2.3	-7.5
USA	16,307	14,280	13,984	-12.4	-2.1
China	9,568	6,552	7,636	-31.5	16.5
Japan	7,912	6,720	6,072	-15.1	-9.6
South Korea	7,084	5,880	3,933	-17.0	-33.1
Germany	4,646	5,112	5,313	10.0	3.9
PURPOSE OF VISITS:					
Holiday	90,091	81,744	90,183	-9.3	10.3
Visit Friends / Relatives	45,517	49,272	56,028	8.2	13.7
Business	23,207	21,072	20,516	-9.2	-2.6
INTERNATIONAL ARRIVAL FLIGHTS:					
Passenger Flights	2,275	2,432	2,498	6.9	2.7

(1) Totals are actual visitor counts and may differ from sample based data.

Table 1b International Visitor Arrivals (Year)

YEAR ENDED OCTOBER	International Visitor Arrivals			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
Total (1)	2,468,561	2,463,055	2,438,626	-0.2	-1.0
MAJOR SOURCES:					
Australia	939,854	967,717	1,061,363	3.0	9.7
UK	299,857	288,823	258,292	-3.7	-10.6
USA	217,368	213,014	197,434	-2.0	-7.3
China	119,602	114,589	104,926	-4.2	-8.4
Japan	124,938	110,960	79,042	-11.2	-28.8
South Korea	104,807	85,551	53,086	-18.4	-37.9
Germany	59,120	61,350	63,799	3.8	4.0
PURPOSE OF VISITS:					
Holiday	1,217,759	1,187,856	1,176,686	-2.5	-0.9
Visit Friends / Relatives	707,696	739,446	773,638	4.5	4.6
Business	270,144	261,262	228,349	-3.3	-12.6
INTERNATIONAL ARRIVAL FLIGHTS:					
Passenger Flights	27,831	28,533	29,046	2.5	1.8

(1) Totals are actual visitor counts and may differ from sample based data.

2. OUTBOUND TOURISM

Departures, October 2009 - In the month of October 2009, New Zealand residents undertook 176,500 short-term overseas trips, up by 630 or 0.4% compared to October 2008.

Destinations - There were more trips to Australia (up 2,400 or 2.5%), Samoa (up 1,200 or 37.0%), Thailand (up 420 or 15.9%), South Korea (up 400 or 51.5%) and Viet Nam (up 360 or 57.8%).

In contrast, there were fewer trips to the United Kingdom (down 940 or 18.7%), Malaysia (down 570 or 38.8%), India (down 460 or 15.1%), New Caledonia (down 400 or 32.1%) and the United States (down 330 or 4.3%).

Purpose – There were more New Zealanders visiting friends and relatives (up 4,100 or 8.1%) in October 2009 compared to October 2008, but fewer on holiday (down 2,700 or 3.4%) and on business (down 1,400 or 5.4%).

Duration - The average length of trips in October 2009 was 15.0 days, 1.1 day shorter than in October 2008.

Annual Departures – There were 1.918 million trips undertaken in the year ended October 2009, down by 65,900 or 3.3% on the previous year.

Figure 2a **Growth Rate of Trips Abroad by NZ Residents (Month of October 2009)**

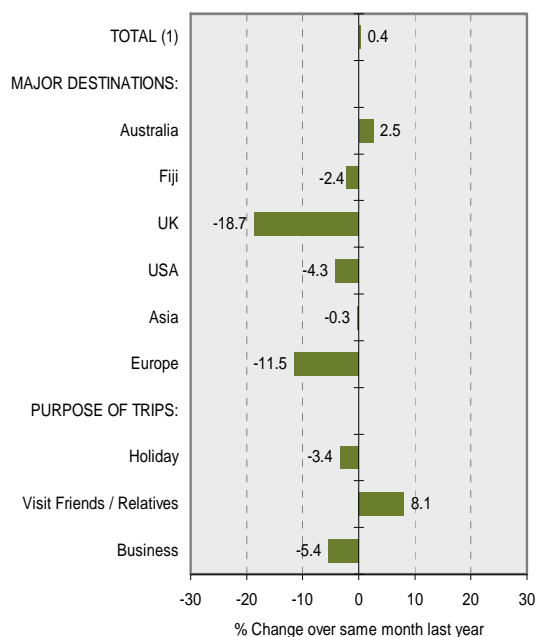
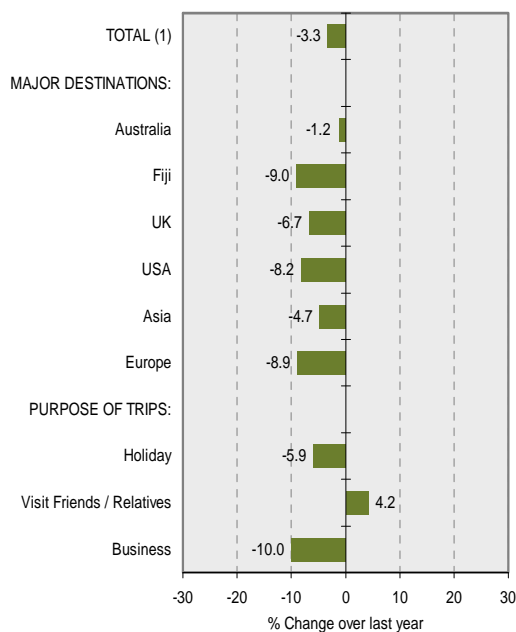


Figure 2b **Growth Rate of Trips Abroad by NZ Residents (Year Ended October 2009)**



2. OUTBOUND TOURISM

Table 2a Trips Abroad by NZ Residents (Month)

OCTOBER MONTH	Trips Abroad by NZ Residents			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
TOTAL (1)	168,092	175,854	176,482	4.6	0.4
MAJOR DESTINATIONS:					
Australia	91,260	95,872	98,307	5.1	2.5
Fiji	7,803	8,876	8,667	13.8	-2.4
UK	4,968	5,012	4,077	0.9	-18.7
USA	7,560	7,700	7,371	1.9	-4.3
Asia	19,251	21,756	21,681	13.0	-0.3
Europe	11,448	8,484	7,506	-25.9	-11.5
PURPOSE OF TRIPS:					
Holiday	74,655	79,772	77,058	6.9	-3.4
Visit Friends / Relatives	44,847	50,288	54,351	12.1	8.1
Business	26,784	25,480	24,111	-4.9	-5.4

(1) Totals are actual visitor counts and may differ from sample based data.

Table 2b Trips Abroad by NZ Residents (Year)

YEAR ENDED OCTOBER	Trips Abroad by NZ Residents			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
TOTAL (1)	1,959,077	1,983,752	1,917,893	1.3	-3.3
MAJOR DESTINATIONS:					
Australia	974,248	954,807	943,326	-2.0	-1.2
Fiji	95,344	100,228	91,164	5.1	-9.0
UK	95,271	93,850	87,518	-1.5	-6.7
USA	90,721	95,344	87,528	5.1	-8.2
Asia	245,638	259,484	247,198	5.6	-4.7
Europe	175,511	170,035	154,849	-3.1	-8.9
PURPOSE OF TRIPS:					
Holiday	824,370	830,253	781,015	0.7	-5.9
Visit Friends / Relatives	612,927	633,555	660,236	3.4	4.2
Business	288,817	285,603	256,936	-1.1	-10.0

(1) Totals are actual visitor counts and may differ from sample based data.

3. COMMERCIAL ACCOMMODATION

Guest Nights, September 2009 - In September 2009, a total of 2.211 million guest nights were spent in short-term commercial accommodation in New Zealand, an increase of 65,000 nights (3.0%) from September 2008.

Both the North Island (up 31,000 or 2.4%) and South Island (up 34,000 or 4.0%) recorded an increase in guest nights in September 2009.

International and Domestic - In September 2009, guest nights comprised 62.6% domestic guests (1.38 million guest nights) and 37.4% international guests (0.83 million guest nights). Compared with September 2008, domestic guests nights increased by 0.5% (6,000) and international guest nights increased by 7.6% (58,000).

Accommodation Types – All four accommodation types recorded an increase in guest nights in September 2009 when compared with September 2008.

Hotels had the largest increase in guest nights (up 30,000 or 3.8%), followed by backpackers (up 16,000 or 5.8%) and motels (up 16,000 or 2.1%). Holiday parks increased by 2,000 guest nights or 0.7%.

Occupancy - The overall occupancy rate of accommodation establishments in September 2009 was 31.6%, down 0.5 percentage point when compared with 32.1% in September 2008.

Motels had the largest decrease in occupancy (43.8%, down 2.0 points), followed by hotels (50.7%, down 0.5 point).

Backpackers had the only increase in occupancy (33.5%, up 0.2 points).

RTOs - In September 2009, Queenstown recorded the largest increase in guest nights (up 8,000 or 4.5%) from September 2008. This was followed by Wanaka (up 7,000 or 19.9%), Wellington (up 6,000 or 3.1%), Rotorua (up 5,000 or 4.6%) and Manawatu (up 5,000 or 11.9%).

Wanganui recorded the largest decrease (down 3,000 or 19.2%), followed by Nelson-Tasman (down 2,000 or 2.7%) and Auckland (down 1,000 or 0.2%).

Annual - For the year ended September 2009, there was a total of 31.853 million guest nights, down by 0.7 million (2.2%) on the previous year.

Note: Changes in Accommodation Data

Since November 11th two changes have been made to the accommodation data.

1. Data for Regional Tourism Organisation (RTO) areas have been updated to the present boundary structure. This replaces the previous set of RTOs that have been based on the old 1996 boundary structure.

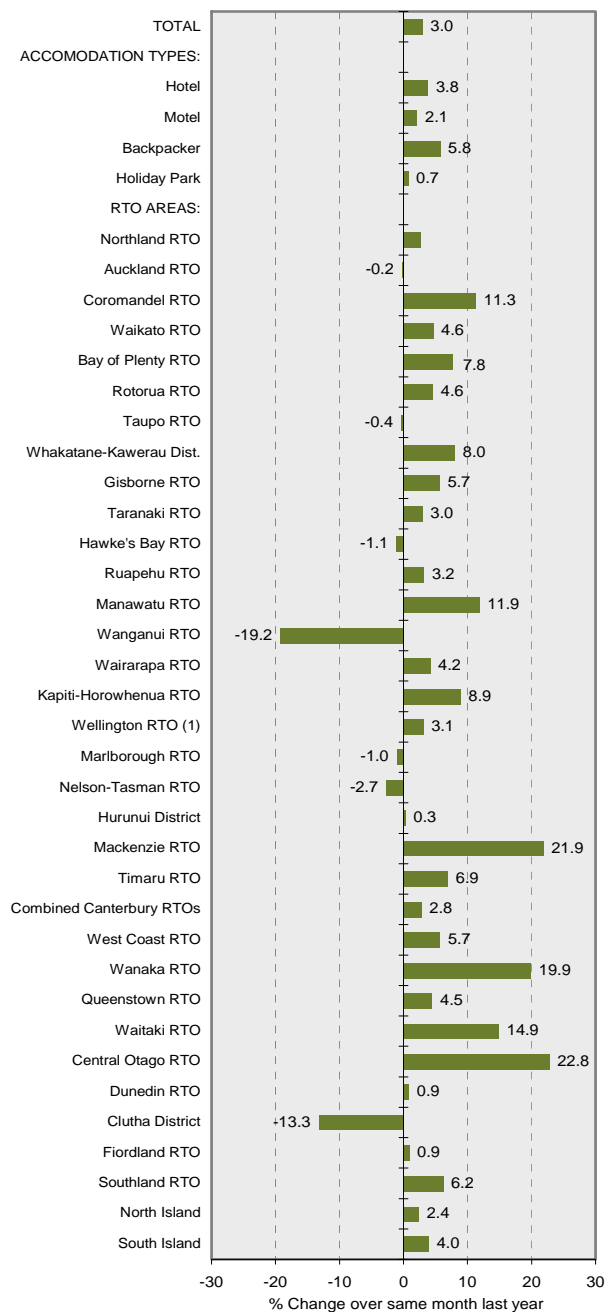
2. The "hosted" accommodation type has been removed from the data.

All historical data has been reproduced on this basis.

These changes are part of the outcome of the Review of Accommodation Survey undertaken by Statistics New Zealand and the Ministry of tourism, with aim of reducing respondent burden while maintaining data quality.

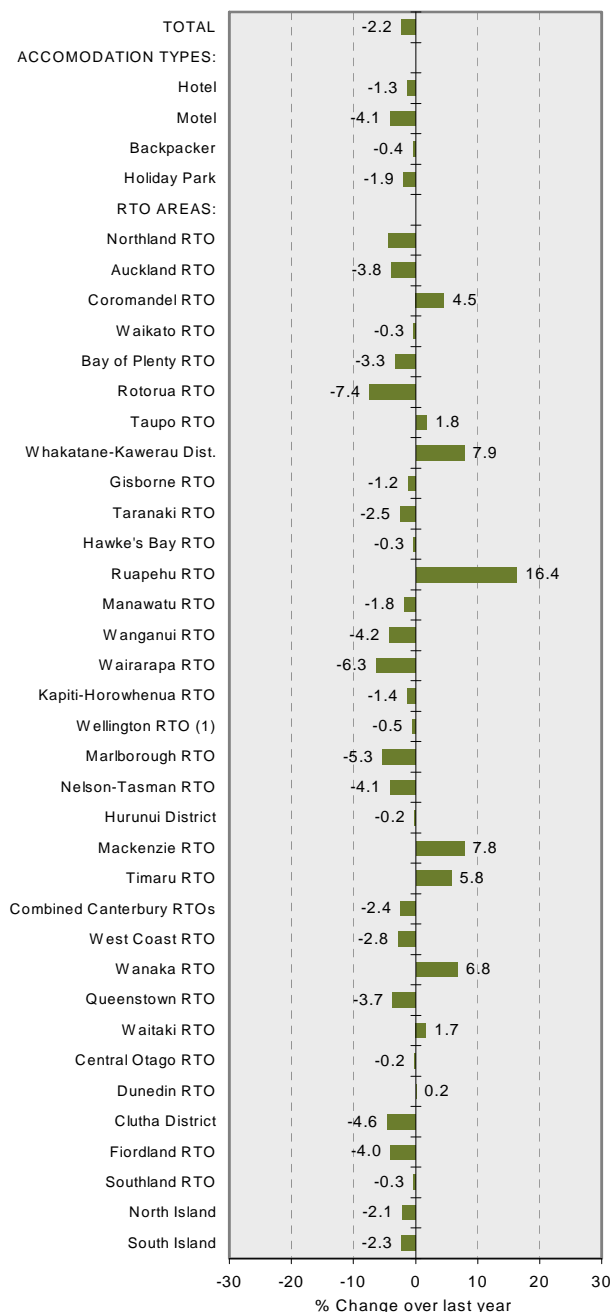
3. COMMERCIAL ACCOMMODATION

Figure 3a **Growth Rate of Guest Nights (Month of September 2009)**



(1) Includes Wellington, Porirua, L & U Hutt cities.

Figure 3b **Growth Rate of Guest Nights (Year Ended September 2009)**



(1) Includes Wellington, Porirua, L & U Hutt cities.

3. COMMERCIAL ACCOMMODATION

Table 3a Guest Nights (Month)

SEPTEMBER MONTH	Guest Nights			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
TOTAL	2,265,177	2,146,081	2,210,753	-5.3	3.0
ACCOMMODATION TYPES:					
Hotel	787,547	785,220	815,281	-0.3	3.8
Motel	839,438	761,816	777,314	-9.3	2.1
Backpacker	308,317	280,362	296,553	-9.2	5.8
Holiday Park	329,216	318,683	321,005	-3.2	0.7
RTO AREAS:					
Northland RTO	31,722	82,795	85,051	-9.7	2.7
Auckland RTO	428,032	414,192	413,193	-3.2	-0.2
Coromandel RTO	29,045	27,443	30,548	-5.5	11.3
Waikato RTO	85,885	76,553	80,037	-10.9	4.6
Bay of Plenty RTO	66,235	59,593	64,218	-10.0	7.8
Rotorua RTO	142,734	115,743	121,052	-18.9	4.6
Taupo RTO	77,192	69,859	69,586	-3.5	-0.4
Whakatane-Kawerau Dist.	11,886	10,336	11,162	-13.0	8.0
Gisborne RTO	20,851	16,072	16,382	-22.9	5.7
Taranaki RTO	36,616	37,420	38,544	2.2	3.0
Hawke's Bay RTO	66,286	65,269	64,542	-1.5	-1.1
Ruapehu RTO	53,784	51,095	52,740	-5.0	3.2
Manawatu RTO	46,727	42,525	47,571	-9.0	11.9
Wanganui RTO	13,903	15,282	12,341	9.9	-19.2
Wairarapa RTO	14,629	12,093	12,598	-17.3	4.2
Kapiti-Horowhenua RTO	13,988	13,754	14,978	-1.7	8.9
Wellington RTO (1)	178,148	182,365	188,014	2.4	3.1
Marlborough RTO	40,507	34,197	33,839	-15.6	-1.0
Nelson-Tasman RTO	53,717	58,709	57,103	9.3	-2.7
Hurunui District	23,177	19,553	19,611	-15.6	0.3
Mackenzie RTO	17,038	20,781	25,326	22.0	21.9
Timaru RTO	20,687	16,446	17,586	-20.5	6.9
Combined Canterbury RTOs	346,368	342,416	352,122	-1.1	2.8
West Coast RTO	74,411	68,637	72,573	-7.8	5.7
Wanaka RTO	43,090	37,042	44,420	-14.0	19.9
Queenstown RTO	183,539	172,806	180,518	-5.8	4.5
Waitaki RTO	16,390	15,311	17,591	-6.6	14.9
Central Otago RTO	18,300	12,762	15,674	-30.3	22.8
Dunedin RTO	61,959	62,748	63,292	1.3	0.9
Clutha District	4,523	3,903	3,384	-13.7	-13.3
Fiordland RTO	18,676	17,725	17,888	-5.1	0.9
Southland RTO	25,975	27,430	29,132	5.6	6.2
North Island	1,377,722	1,292,395	1,323,217	-6.2	2.4
South Island	887,455	853,686	887,536	-3.8	4.0

(1) Wellington region includes - Wellington, Porirua, L & U Hutt.

Table 3b Guest Nights (Year)

YEAR ENDED SEPTEMBER	Guest Nights			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
TOTAL	32,422,896	32,573,963	31,852,741	0.5	-2.2
ACCOMMODATION TYPES:					
Hotel	10,357,457	10,705,533	10,562,757	3.4	-1.3
Motel	11,080,345	10,766,060	10,328,458	-2.8	-4.1
Backpacker	4,555,497	4,588,800	4,571,614	0.7	-0.4
Holiday Park	6,429,597	6,513,570	6,389,912	1.3	-1.9
RTO AREAS:					
Northland RTO	1,752,039	1,684,003	1,610,490	-3.9	-4.4
Auckland RTO	5,531,738	5,676,435	5,458,472	2.6	-3.8
Coromandel RTO	678,553	641,608	670,666	-5.4	4.5
Waikato RTO	1,089,299	1,032,364	1,029,476	-5.2	-0.3
Bay of Plenty RTO	386,971	1,005,726	972,181	1.9	-3.3
Rotorua RTO	1,855,132	1,837,497	1,701,485	-1.0	-7.4
Taupo RTO	1,041,548	968,753	986,189	-7.0	1.8
Whakatane-Kawerau Dist.	274,927	241,886	260,972	-12.0	7.9
Gisborne RTO	370,079	375,501	371,031	1.5	-1.2
Taranaki RTO	542,289	564,619	550,569	4.1	-2.5
Hawke's Bay RTO	1,083,651	1,058,361	1,055,381	-2.3	-0.3
Ruapehu RTO	385,325	362,465	421,761	-5.9	16.4
Manawatu RTO	539,926	525,987	516,707	-2.6	-1.8
Wanganui RTO	184,828	196,422	188,150	6.3	-4.2
Wairarapa RTO	213,845	203,771	190,863	-4.7	-6.3
Kapiti-Horowhenua RTO	205,736	208,247	205,432	1.2	-1.4
Wellington RTO (1)	2,185,288	2,320,052	2,308,693	6.2	-0.5
Marlborough RTO	707,253	722,243	684,283	2.1	-5.3
Nelson-Tasman RTO	1,236,923	1,264,668	1,212,771	2.2	-4.1
Hurunui District	298,004	308,007	307,387	3.4	-0.2
Mackenzie RTO	353,748	378,196	407,617	6.9	7.8
Timaru RTO	254,520	257,372	272,270	1.1	5.8
Combined Canterbury RTOs	4,896,628	5,091,075	4,968,571	4.0	-2.4
West Coast RTO	1,271,093	1,257,514	1,221,923	-1.1	-2.8
Wanaka RTO	555,237	529,230	565,151	-4.7	6.8
Queenstown RTO	2,360,500	2,383,393	2,295,095	1.0	-3.7
Waitaki RTO	302,395	274,829	279,527	-9.1	1.7
Central Otago RTO	326,076	331,829	331,252	1.8	-0.2
Dunedin RTO	891,722	871,011	872,949	-2.3	0.2
Clutha District	87,048	81,581	77,821	-6.3	-4.6
Fiordland RTO	431,866	412,112	395,422	-4.6	-4.0
Southland RTO	434,394	450,785	449,464	3.6	-0.3
North Island	18,921,162	18,903,695	18,438,511	-0.1	-2.1
South Island	13,501,735	13,670,270	13,354,229	1.2	-2.3

(1) Wellington region includes - Wellington, Porirua, L & U Hutt.

4. INTERNATIONAL VISITOR EXPENDITURE

Expenditure, Year ended September 2009 - International visitors spent a total of \$6,102 million in New Zealand for the year ended September 2009 (excluding international airfares). This is an increase of 1.2% (\$74 million) on the previous year.

Markets – The Chinese market recorded the largest increase, up by \$78 million or 32.4%, followed by Australia (up \$61 million or 3.7%), Germany (up \$57 million or 23.5%) and the United States (up \$39 million or 6.6%).

In contrast, the expenditure by the United Kingdom (down \$153 million or 15.8%), South Korea (down \$46 million or 19.6%) and Japan (down \$14 million or 3.5%) markets were lower than the previous September year.

Average Spend - The average spend per visitor was \$2,771 up 2.9% on the previous year.

Figure 4 International Visitor Expenditure Growth Rate (Year Ended September 2009)

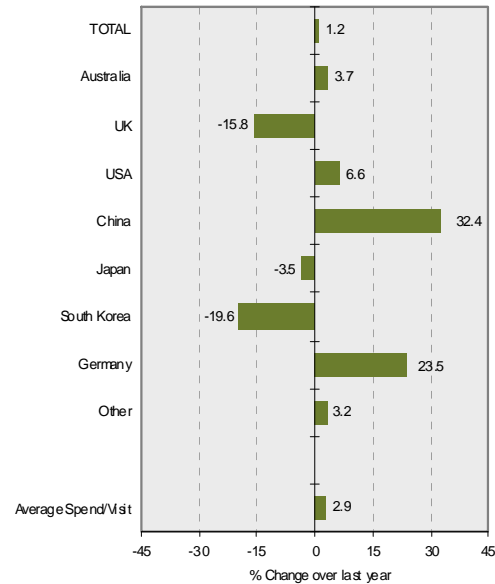


Table 4 International Visitor Expenditure (Year)

YEAR ENDED SEPTEMBER	NZ\$million ¹¹			Growth Rate (%)	
	2007	2008	2009	07-08	08-09
TOTAL	6,021	6,028	6,102	0.1	1.2
Australia	1,539	1,655	1,716	7.5	3.7
UK	333	371	318	4.1	-15.8
USA	701	590	629	-15.8	6.6
China	268	241	319	-10.4	32.4
Japan	403	407	392	0.8	-3.5
South Korea	239	235	189	-1.8	-19.6
Germany	250	242	299	-3.2	23.5
Other	1,687	1,688	1,741	0.02	3.2
Average Spend/Visit	2,670	2,692	2,771	0.8	2.9

¹¹ Expenditure refers to spend by travellers aged 15+, and excludes international airfares.

5. DOMESTIC TOURISM

Overnight Trips, Year ended December 2008 - For the year ended December 2008, the number of overnight trips increased by 1.1% (168,000) to 15.1 million trips, while the number of visitor nights increased by 0.4% (or 193,000) to 44.5 million. On average, overnight visitors stayed 3.0 nights away from home.

Day Trips - The number of day trips increased by 3.6% (or 990,000) to 28.3 million for the year ended December 2008.

Expenditure - Overall, domestic tourism expenditure increased by 6.2% (or \$471 million) to \$8.06 billion for the year ended December 2008. Overnight trip expenditure was up 2.0% (or \$100 million) to \$5.14 billion while day trip expenditure was up 14.5% (or \$371 million) to \$2.92 billion.

- Average spend per day trip \$103
- Average spend per overnight trip \$341
- Average spend per night \$116

Figure 5 Domestic Tourism Growth Rate (Year Ended December 2008)

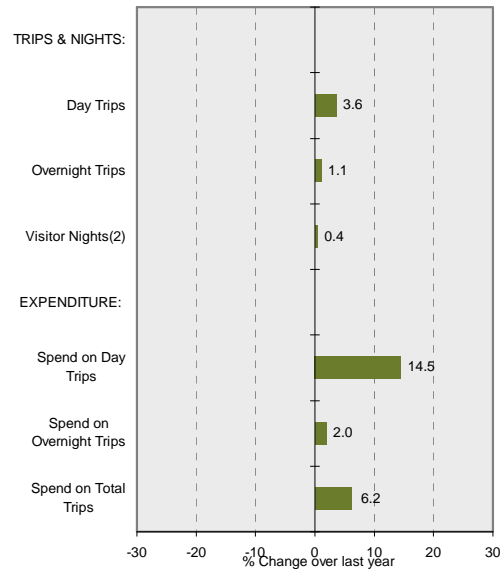


Table 5 Domestic Tourism (Year)

YEAR ENDED DECEMBER	Domestic Travel ⁽¹⁾			Growth Rate (%)	
	2006	2007	2008	06-07	07-08
TRIPS & NIGHTS:					
	(000)				
Day Trips	23,471	27,333	28,322	-7.3	3.6
Overnight Trips	14,739	14,896	15,064	1.1	1.1
Visitor Nights ⁽²⁾	43,371	44,352	44,545	0.3	0.4
EXPENDITURE:					
	(\$million)				
Spend on Day Trips	2,626	2,550	2,920	-2.9	14.5
Spend on Overnight Trips	4,843	5,038	5,138	4.0	2.0
Spend on Total Trips	7,468	7,587	8,058	1.6	6.2

(1) Refer to travellers aged 15+. (2) Includes stays in commercial and private accommodation.

6. TOURISM SATELLITE ACCOUNT

The Tourism Satellite Account provides key measures of tourism's contribution to the New Zealand economy.

Tourism Expenditure, Year ended March 2009 - Total tourism expenditure for the 2009 March year was \$21.7 billion, up by 1.1% (or \$226 million) on the previous year. This was driven by a 2.6% (\$313m) increase in domestic visitor spend and by a 0.9% (-\$87m) decrease in international visitor spend.

Tourism Contribution to GDP - Tourism's direct and indirect value-added contribution to the economy was \$15.0 billion (excluding GST, import duties and other taxes on production), which represents 9.1 % of the total New Zealand GDP.

Domestic and International Segments - Domestic tourists spent \$12.4 billion and international tourists spent \$9.3 billion. This represents a 57% domestic and 43% international contribution to total expenditure. Domestic travel activity includes both household travel of \$9.7 billion, and business and government travel of \$2.7 billion.

Tourism Export Earnings - International tourist expenditure in 2009 (\$9.31 billion) represents 16.4% of the total export earnings (\$56.71 billion). Tourism is New Zealand's second largest export earner, surpassed by dairy (\$9.97 billion or 17.6% of exports) in 2009.

Tourism Employment - Tourism is estimated to support directly and indirectly 185,000 full-time equivalent jobs, or 9.6% (one in ten) of the total New Zealand workforce in 2009.

Tourism Contribution to GST - Tourists contributed \$1.59 billion in GST payments in 2009, or 11.1% of total GST on production received by Government.

Note: The latest TSA 2009 has adopted the United Nations World Tourism Organisation (UNWTO) new standard method for deriving tourism value added. This change is in line with the direct contact principle of having strong economic link between the tourist and the supplier of goods or services.

The effect of the change has resulted in a reallocation of some components of direct tourism value added to indirect tourism value added. The reallocation does not affect aggregated total tourism value added, which is unchanged. All earlier estimates have been revised based on the new standard.

More detailed TSA data and technical information is available in the report *Tourism Satellite Account 2009* at the Ministry of Tourism research website:

<http://www.tourismresearch.govt.nz/tsa> and Statistics NZ website: www.stats.govt.nz/tourism

Table 6 Tourism Satellite Account, 2007-2009

YEAR ENDED MARCH				Growth Rate (%)	
	2007	2008	2009	07-08	08-09
Tourism Expenditure (\$million)	20,397	21,511	21,737	5.5	1.1
Direct Tourism Value Added	6,388	6,660	6,364	4.3	-4.4
Indirect Tourism Value Added	7,877	8,371	8,665	6.3	3.5
Imports (sold/used in production sold to tourists)	4,630	4,905	5,115	5.9	4.3
GST Paid on Purchases by Tourists	1,502	1,574	1,594	4.8	1.3
International Tourism Expenditure(1)	8,982	9,400	9,313	4.6	-0.9
Domestic Tourism Expenditure	11,415	12,111	12,424	6.1	2.6
Persons Engaged in Tourism (full-time equivalent, 000)	181	184	185	1.5	0.5
Directly Engaged in Tourism	93	94	95	1.7	0.4
Indirectly Engaged in Tourism	89	90	90	1.2	0.7
Tourism Contributions to NZ Economy (Percent)					
Tourism Direct & Indirect Value Added Expenditure (% of GDP)	9.3	9.2	9.1
Tourism Direct & Indirect Employment (% of Total FTE Employment)	9.6	9.7	9.6
Tourism GST (% of Total GST on production)	11.4	11.2	11.1
Tourism Export Earning (% of Total Export)	18.6	18.3	16.4

(1) Includes international airfares.

7. TOURISM FORECASTS

Tourism forecasts, 2009-2015 - The latest Ministry of Tourism forecasts provide an outlook on tourism demand in New Zealand over the next seven years. The forecasts are intended to assist the tourism sector decision-making and planning.

International visitor arrivals - are forecast to increase from 2.45 million in 2008 to 2.90 million in 2015. This represents a growth of 18.6% (or 455,000 visitors). The average annual growth rate is 2.5%.

The performance will be weak in the short term, with international visitor arrivals are expected to decrease by 104,000 or 4.2% in 2009. This is the largest annual decrease in the last six decades, reflecting significant impact of the worst economic recession in this period and compounded by the influenza A (H1N1) pandemic.

Visitor arrivals to New Zealand are forecast to rebound by 2.5% in 2010 as global economy is expected to recover gradually. This will be followed by a strong 6.5% growth in 2011 boosted by New Zealand hosting the Rugby World Cup event. For the rest of forecast period a sound growth level of 3.4% per year is expected.

At the market level performance will vary considerably over the next seven years. The largest visitor growth is expected to come from Australia (up 230,000 or 24%) and China (up 70,000 or 63%). These two markets will contribute two-thirds of the expected total increase in visitors. Other mature key markets will contribute more modest growth including the USA (up 20,000 or 9%), Germany (up 9,000 or 15%), South Korea (up 8,000 or 9%), Canada (up 8,000 or 16%) and UK (up 7,000 or 2%). The Japan market is forecast to decrease slightly. The rest of the world markets are forecast to increase by 113,000 or 18%.

Visitor numbers from our largest market, Australia, are expected to reach 1.2 million in 2015, comprising 42% share of total international visitors, up from 40% in 2008.

Domestic trips - are forecast to increase from 51.1 million in 2008 to 53.7 million in 2015, up by 2.6 million or 5.1%, averaging 0.7% per annum. The growth will be driven by an additional 0.6 million overnight trips (up 3.6%) and 2.0 million day trips (up 5.9%).

Visitor nights - are forecast to increase from 102 million in 2008 to 111 million in 2015, up by 8.7 million or 8.5%, averaging 1.2% per annum. The growth will be driven by an additional 7.0 million international visitor nights (up 14.4% from 48.7 to 55.8 million) and 1.6 million domestic visitor nights (up 3.1% from 53.3 to 55.0 million).

Visitor spend - is forecast to increase from \$14.0 billion in 2008 to \$18.1 billion in 2015, up by \$4.1 billion or 29.6%, averaging 3.8% per annum. The growth will be driven by an additional \$2.3 billion international visitor spend (up 38.1% from \$5.9b to \$8.2b) and \$1.9 billion domestic visitor spend (up 23.3% from \$8.1b to \$9.9b).

Outbound travel by New Zealand residents - is forecast to increase from 1.97 million in 2008 to 2.23 million in 2015, an increase of 262,000 or 13.3%, averaging 1.8% per annum.

Further details of these forecasts are available in report as well as Excel *pivot tables* at: www.tourismresearch.govt.nz/forecasts

Table 7 Tourism Forecasts, 2009-2015

YEAR ENDED DECEMBER	Actual		Forecast						Growth 2008-2015		
	2008(1)	2009	2010	2011	2012	2013	2014	2015	Change	Total	Annual
International Visitors (000)	2,447	2,344	2,402	2,557	2,620	2,714	2,807	2,902	455	18.6%	2.5%
Domestic Trips (000) (2)	51,094	51,770	52,481	52,878	53,065	53,244	53,469	53,692	2,598	5.1%	0.7%
Overnight Trips (000)	17,998	18,381	18,799	18,903	18,821	18,732	18,688	18,642	644	3.6%	0.5%
Day Trips (000)	33,096	33,389	33,682	33,975	34,244	34,512	34,781	35,050	1,954	5.9%	0.8%
Visitor Nights (000)	102,069	99,793	101,944	105,208	106,018	107,471	109,073	110,748	8,679	8.5%	1.2%
International (000)	48,729	45,320	46,247	49,309	50,441	52,178	53,931	55,761	7,031	14.4%	1.9%
Domestic (000)	53,339	54,474	55,697	55,899	55,577	55,293	55,142	54,987	1,648	3.1%	0.4%
Visitor Expenditure (\$million)	14,005	14,027	14,710	15,539	16,084	16,748	17,438	18,150	4,145	29.6%	3.8%
International (000) (3)	5,947	5,833	6,098	6,650	6,964	7,365	7,778	8,215	2,268	38.1%	4.7%
Domestic (000) (4)	8,058	8,194	8,612	8,889	9,120	9,383	9,660	9,935	1,877	23.3%	3.0%
NZ Outbound Trips (000)	1,965	1,890	1,870	1,959	2,060	2,119	2,173	2,228	262	13.3%	1.8%

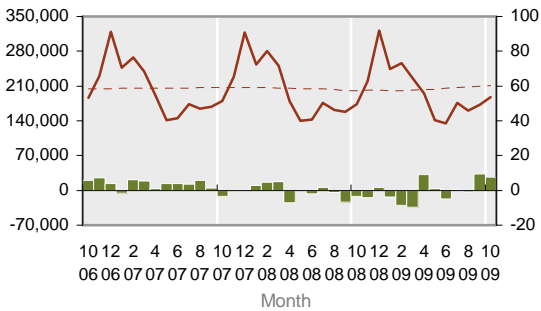
(1) Actual for base year. (2) Figures for domestic visitors in this table refer to all ages (differ to Table 5 which refers to aged 15+).

(3) Refers to spend in NZ, excluding international airfares. (4) Excludes some travel expenditure by government and business sectors.

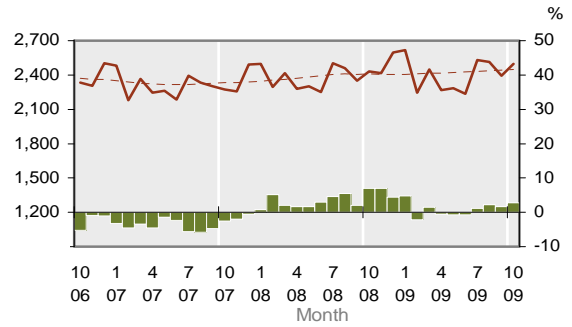
TRENDS AND PATTERNS

1. Inbound Tourism

1.1 International Visitor Arrivals

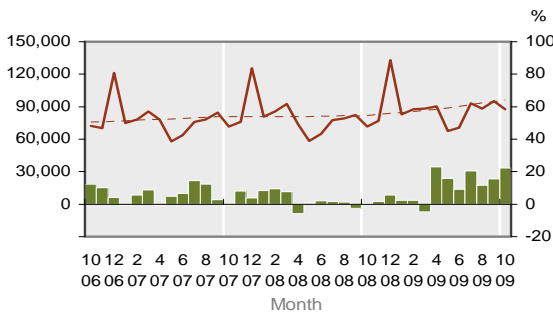


1.2 International Passenger Arrival Flights

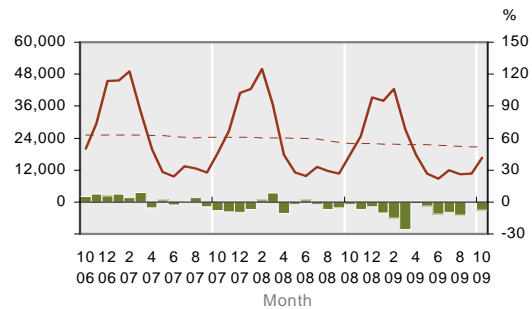


Major Sources

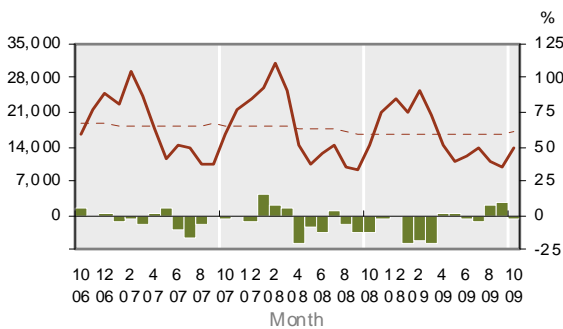
1.3 Visitors from - Australia



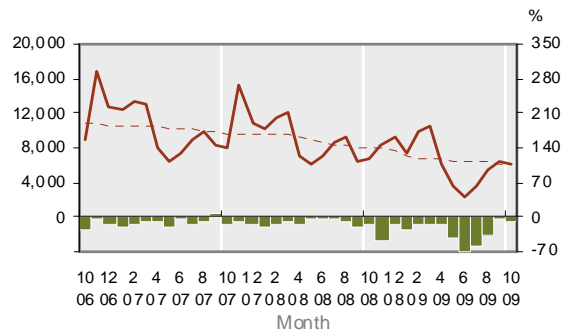
1.4 Visitors from - UK



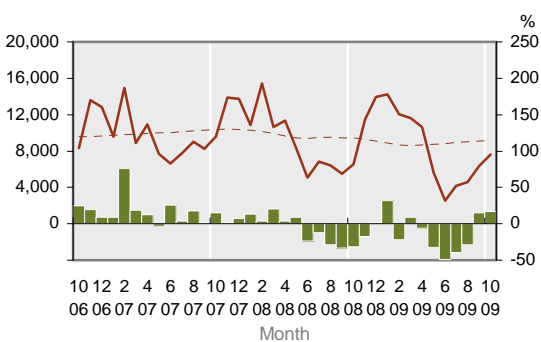
1.5 Visitors from - USA



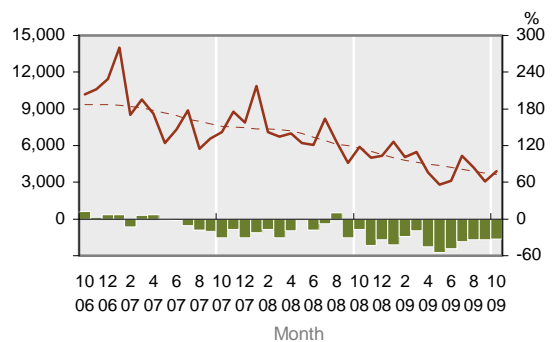
1.6 Visitors from - Japan



1.7 Visitors from - China



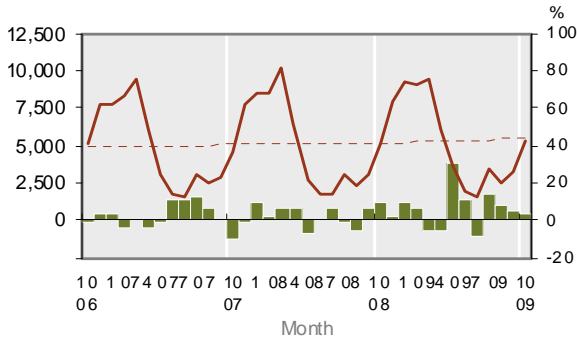
1.8 Visitors from - South Korea



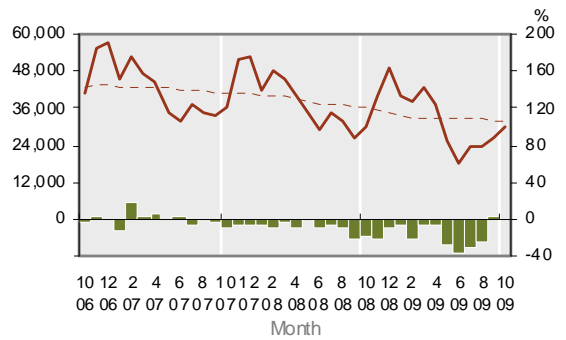
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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

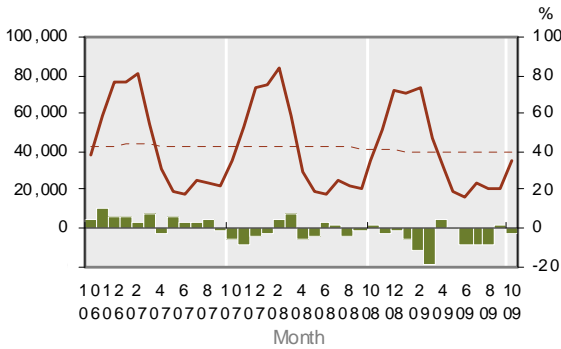
1.9 Visitors from - Germany



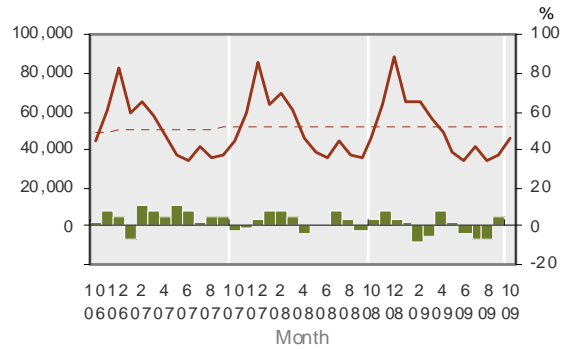
1.10 Visitors from - Asia



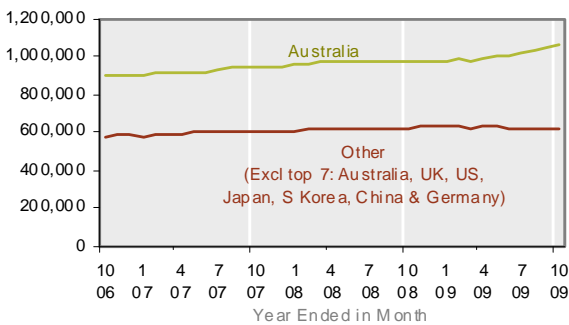
1.11 Visitors from - Europe



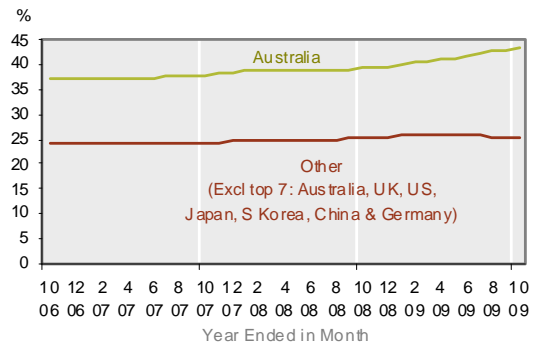
1.12 Visitors from - Other



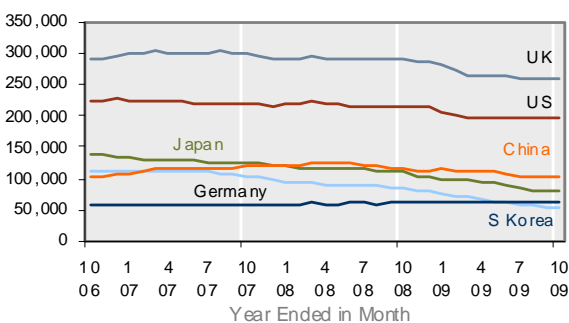
1.13 Visitors by Major Source



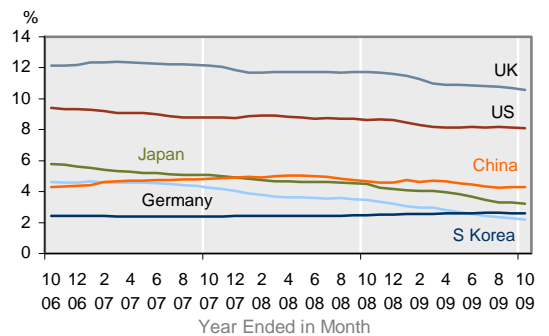
1.14 Share of Total International Visitors (%)



1.15 Visitors by Major Source



1.16 Share of Visitors by Major Source (%)

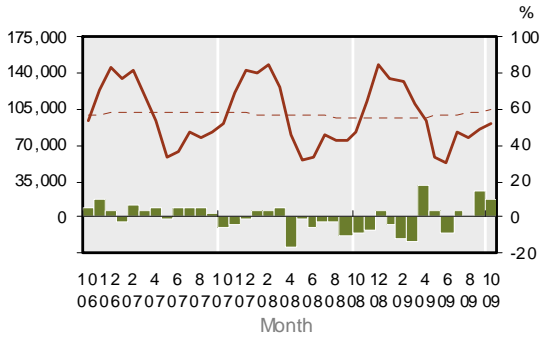


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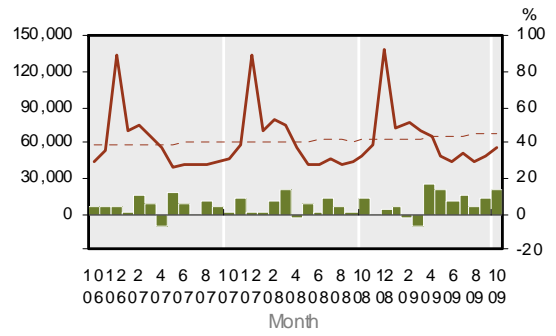
TRENDS AND PATTERNS

Purpose of Visits

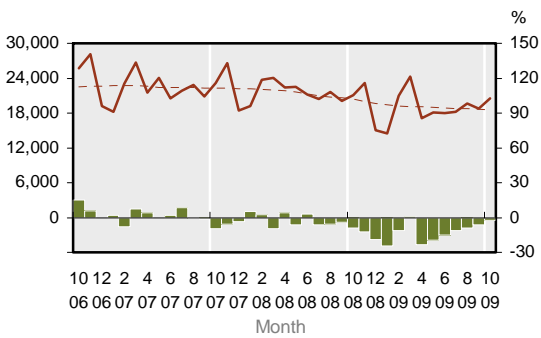
1.17 International Visitors - Holiday



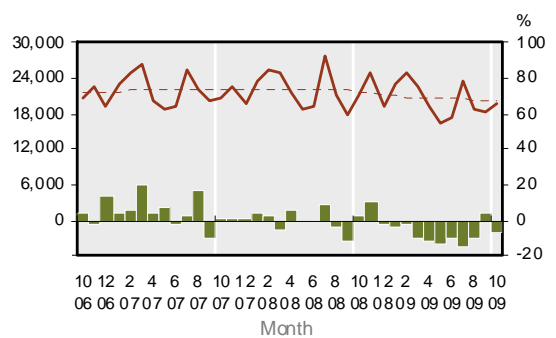
1.18 International Visitors - VFR



1.19 International Visitors - Business



1.20 International Visitors - Other

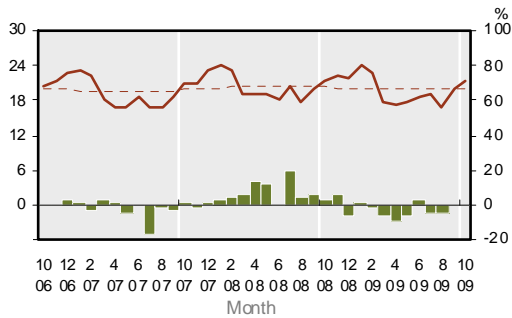


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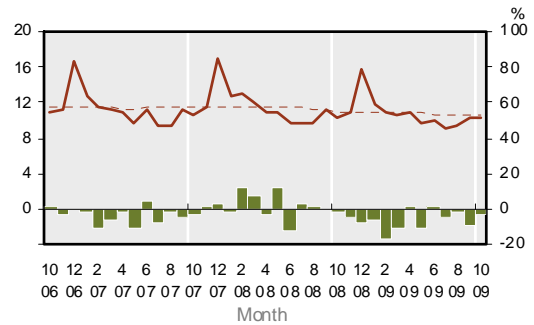
TRENDS AND PATTERNS

Length of Stay (Note: Figures based on intended length of stay in NZ)

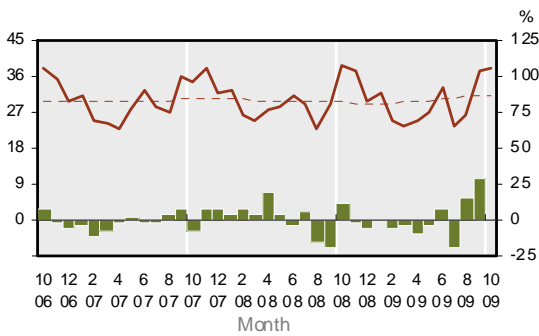
1.21 Average Days of Stay by Visitors



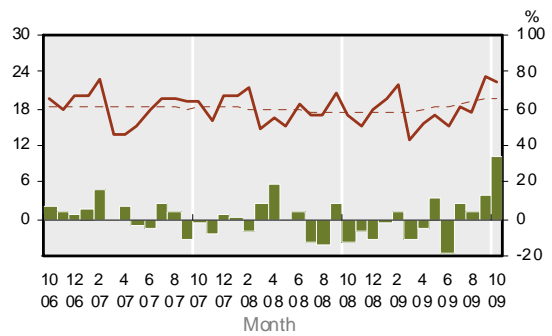
1.22 Average Days Stayed - Australian Visitors



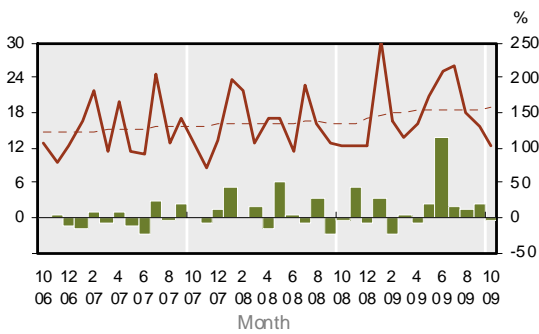
1.23 Average Days Stayed - UK Visitors



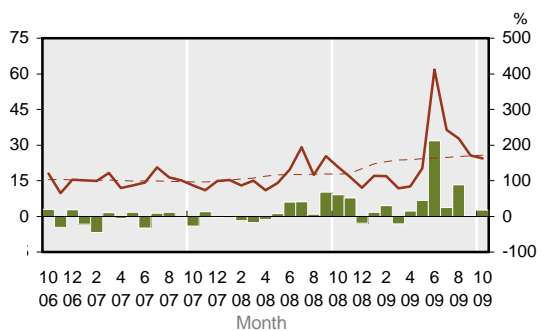
1.24 Average Days Stayed - US Visitors



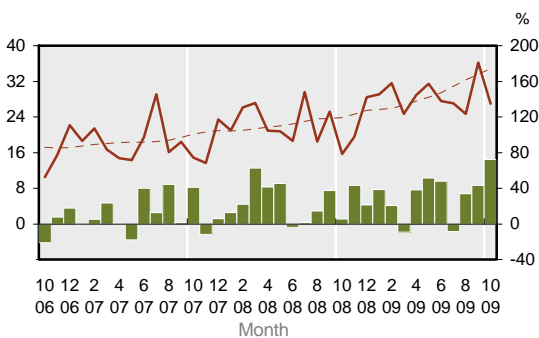
1.25 Average Days Stayed - Japanese Visitors



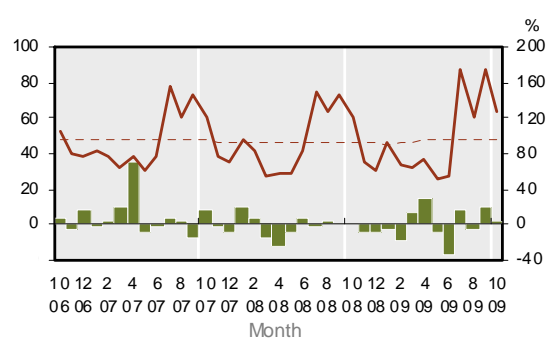
1.26 Average Days Stayed - Chinese Visitors



1.27 Average Days Stayed - S Korea Visitors



1.28 Average Days Stayed - German Visitors



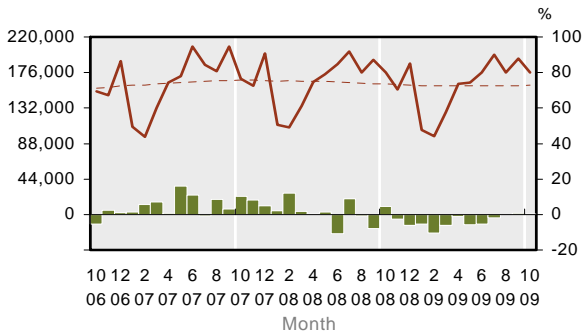
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TRENDS AND PATTERNS

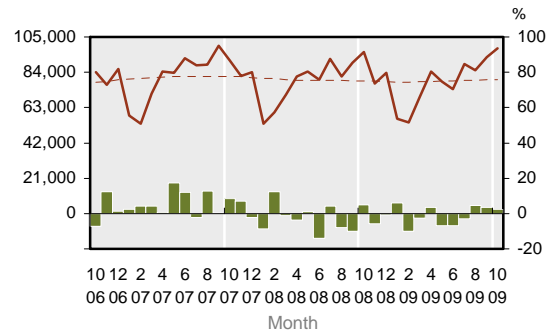
2. Outbound Tourism

Major Destinations

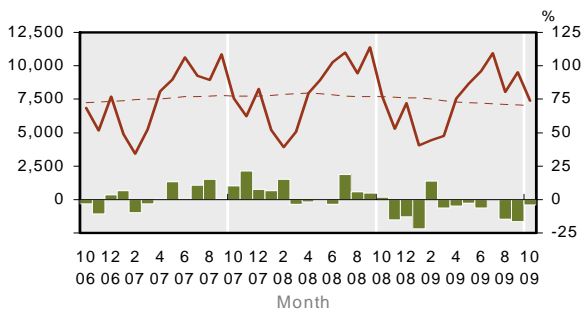
2.1 NZer Trips Abroad



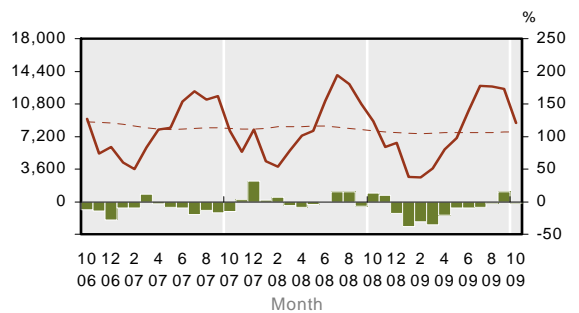
2.2 NZer Trips to - Australia



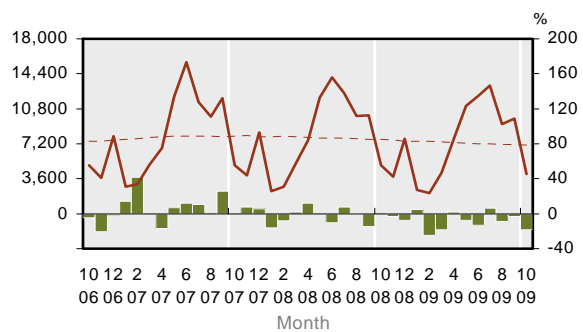
2.3 NZer Trips to - USA



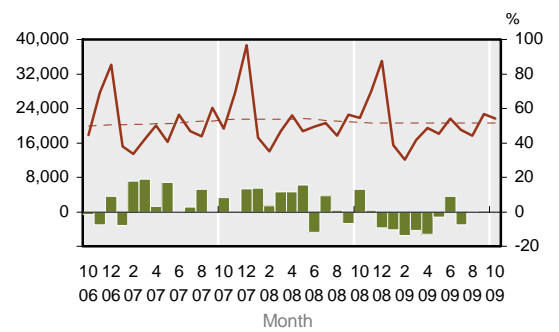
2.4 NZer Trips to - Fiji



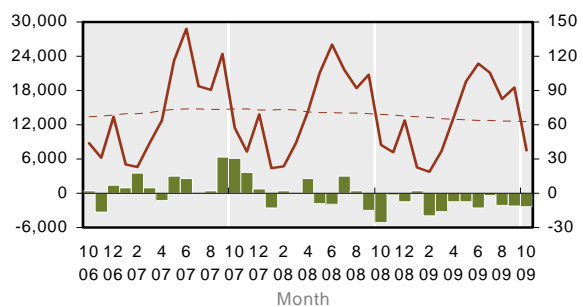
2.5 NZer Trips to - UK



2.6 NZer Trips to - Asia



2.7 NZer Trips to - Europe

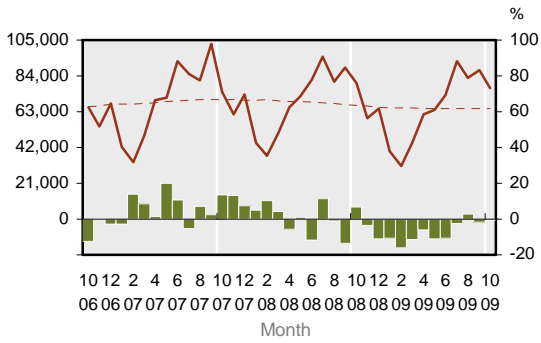


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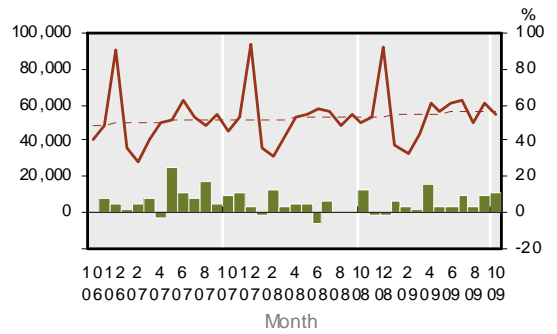
TRENDS AND PATTERNS

Purpose of Trips Abroad

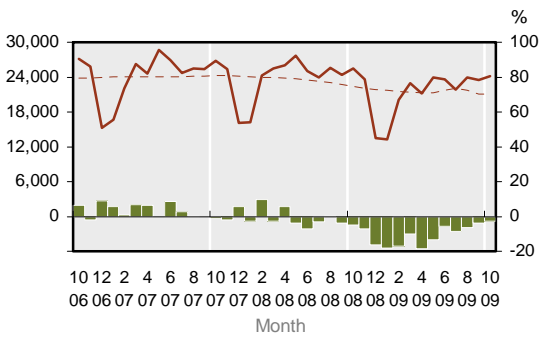
2.8 NZer Trips Abroad - Holiday



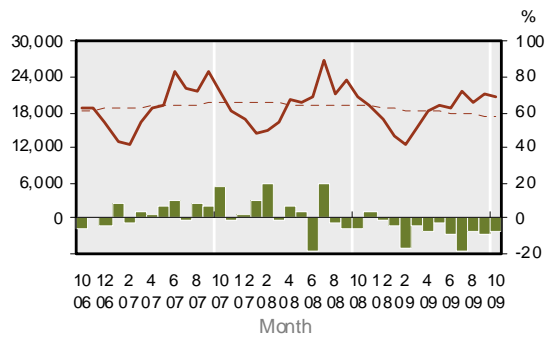
2.9 NZer Trips Abroad - VFR



2.10 NZer Trips Abroad - Business



2.11 NZer Trips Abroad - Other



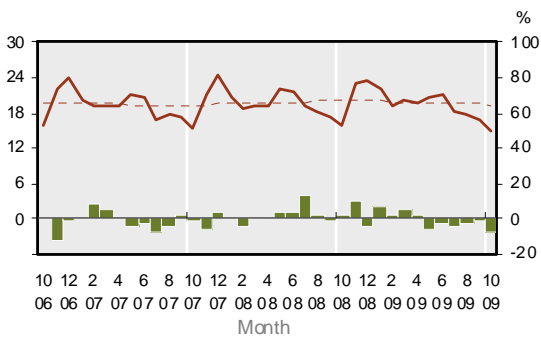
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TRENDS AND PATTERNS

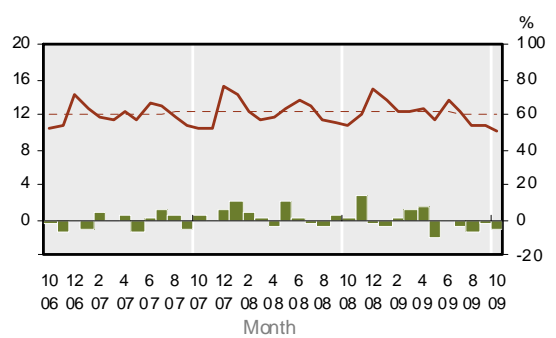
Length of Trips Abroad

Note: Figures are based on intended length of short-term departure trips by New Zealand residents. The average days abroad refer to period of absence from New Zealand but not necessarily all spent in one country. The country referred is the main destination where they spent most time in.

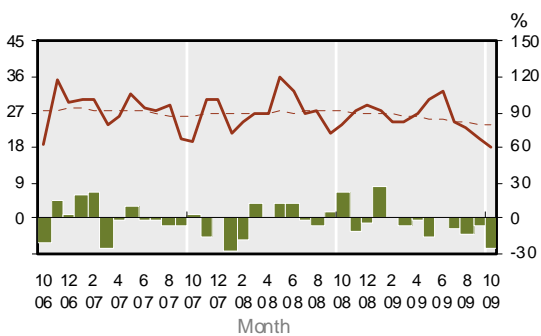
2.12 Average Days Abroad



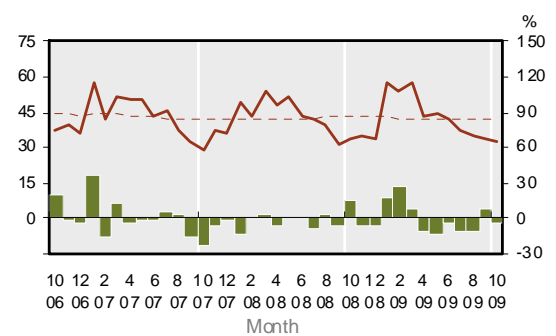
2.13 NZers Average Days Abroad - Australia



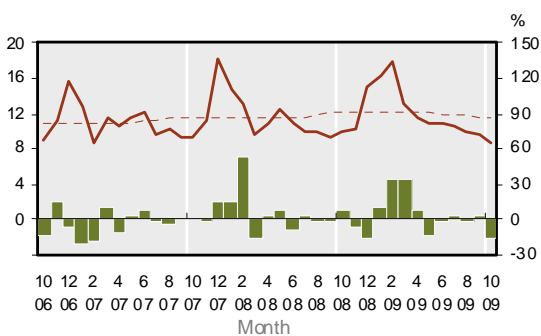
2.14 NZers Average Days Abroad - US



2.15 NZers Average Days Abroad - UK



2.16 NZers Average Days Abroad - Fiji

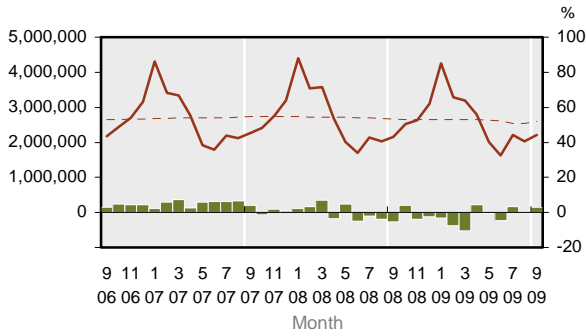


KEY:
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 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

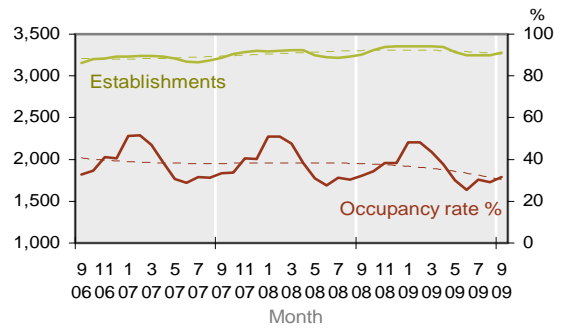
TRENDS AND PATTERNS

3. Commercial Accommodation

3.1 Total Guest Nights

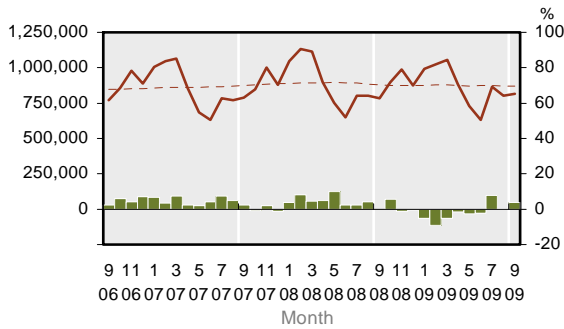


3.2 Total Establishments and Occupancy Rates

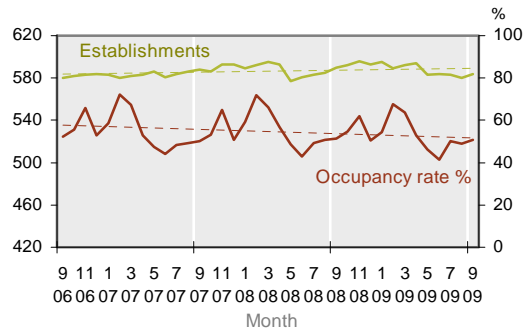


Guest Nights by Accommodation Type

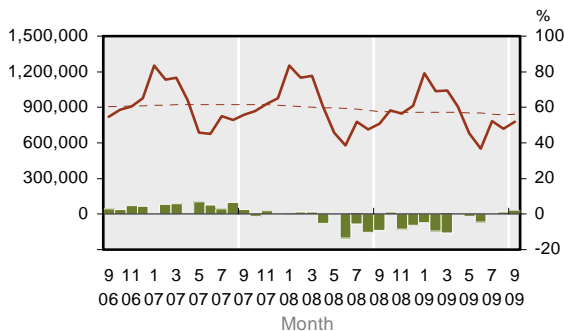
3.3 Hotel Guest Nights



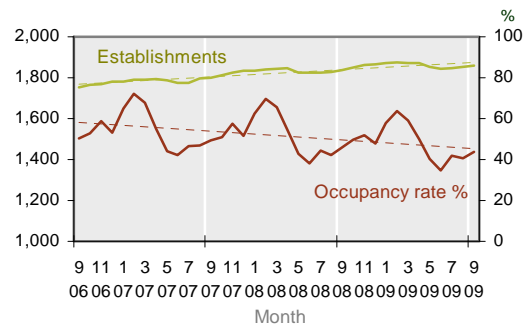
3.4 Hotel Establishments and Occupancy Rates



3.5 Motel Guest Nights



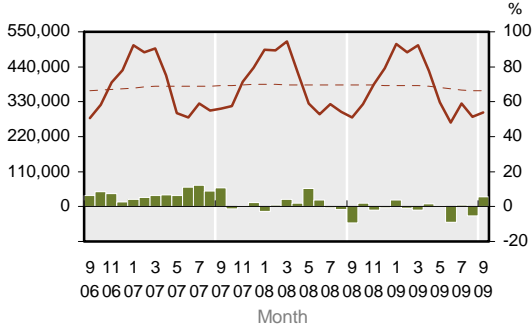
3.6 Motel Establishments and Occupancy Rates



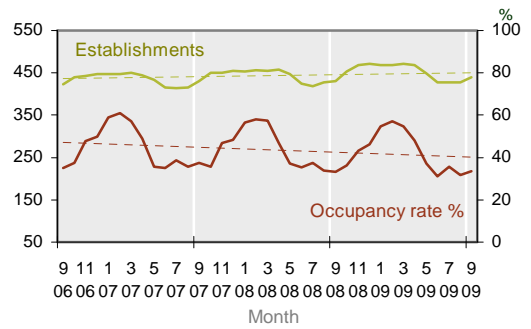
KEY:
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 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

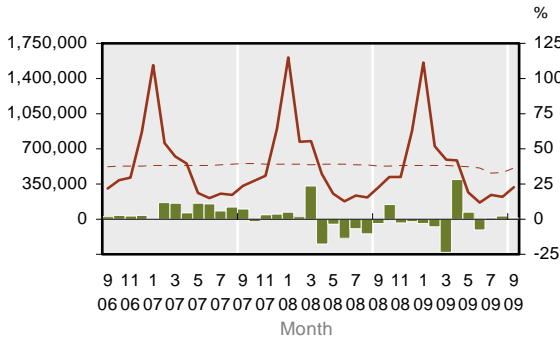
3.7 Backpacker Guest Nights



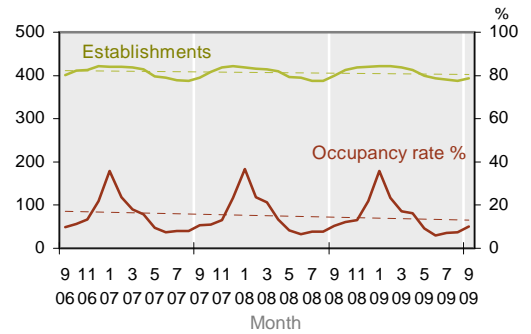
3.8 Backpacker Establishments and Occupancy Rates



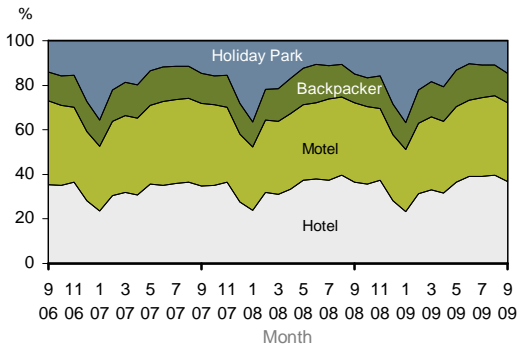
3.9 Holiday Park Guest Nights



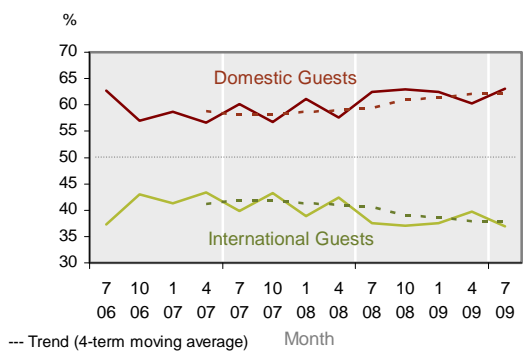
3.10 Holiday Park Establishments and Occupancy Rates



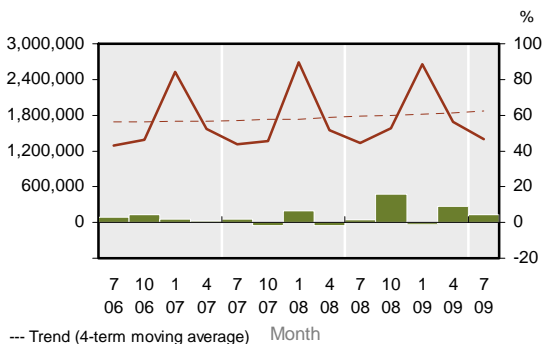
3.11 Share of Guest Nights by Accommodation Type



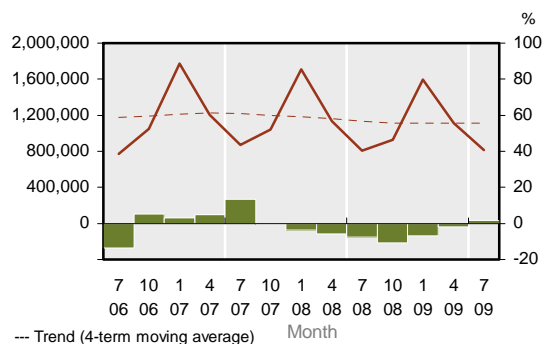
3.12 International and Domestic Share of Guest Nights



3.13 Domestic Guest Nights



3.14 International Guest Nights

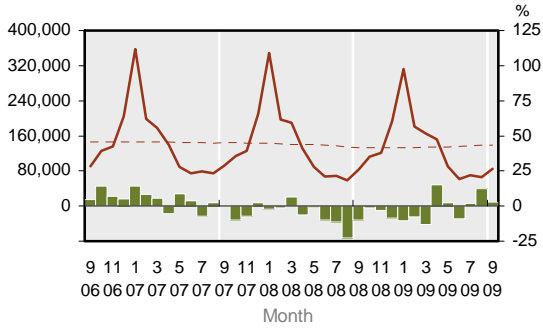


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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

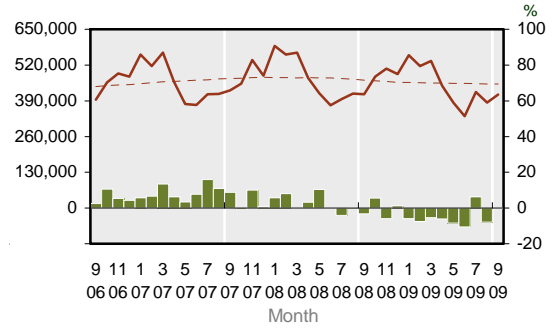
TRENDS AND PATTERNS

Guest Nights by Regional Tourism Organisation and District

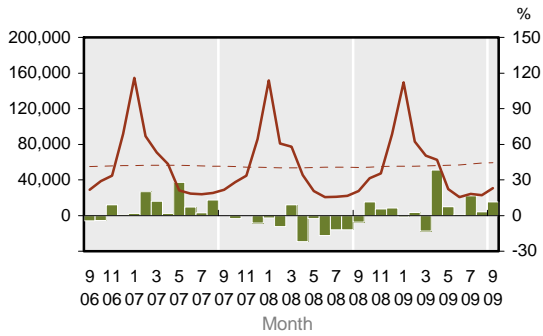
3.15 Northland RTO Guest Nights



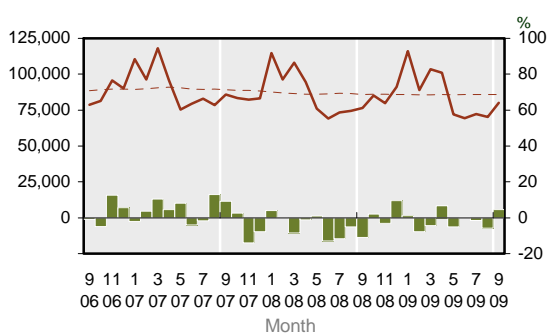
3.16 Auckland RTO Guest Nights



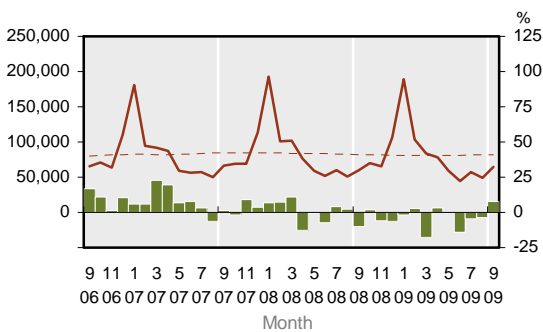
3.17 Coromandel RTO Guest Nights



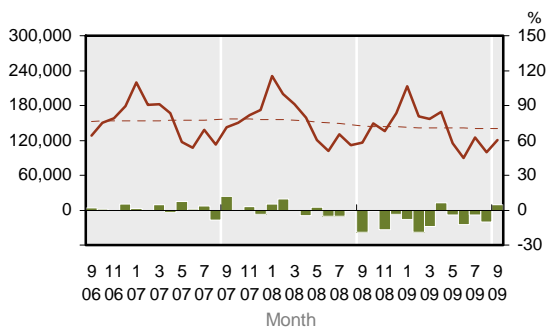
3.18 Waikato RTO Guest Nights



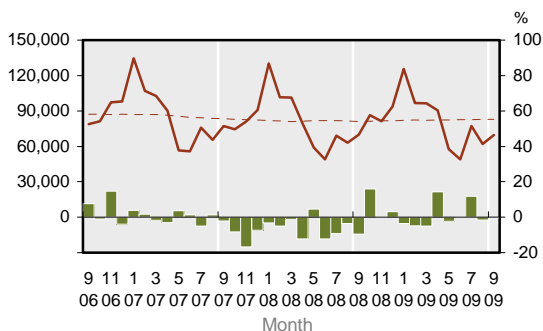
3.19 Bay of Plenty RTO Guest Nights



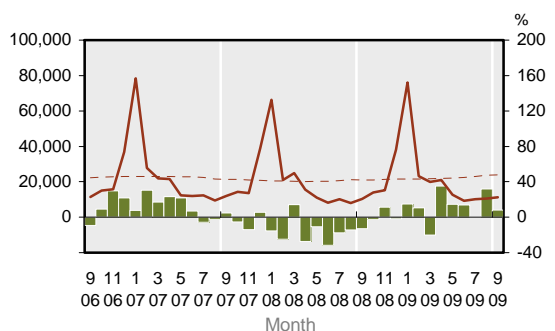
3.20 Rotorua RTO Guest Nights



3.21 Taupo RTO Guest Nights



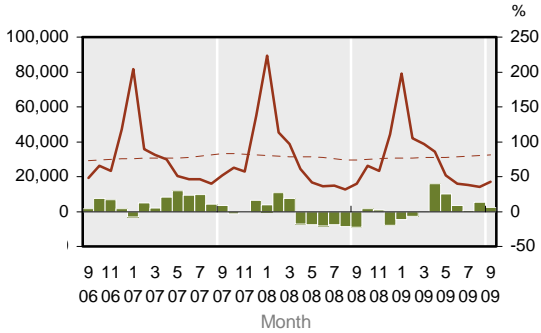
3.22 Whakatane-Kawerau District Guest Nights



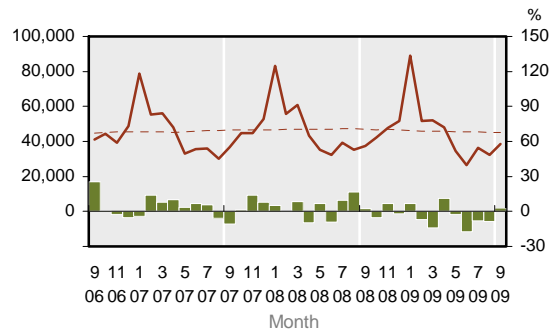
KEY:
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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

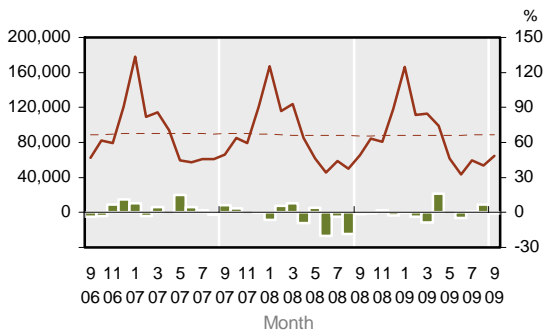
3.23 Gisborne RTO Guest Nights



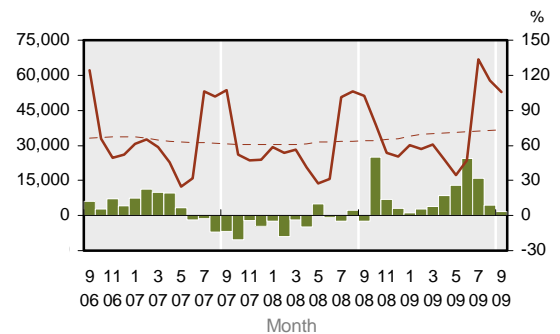
3.24 Taranaki RTO Guest Nights



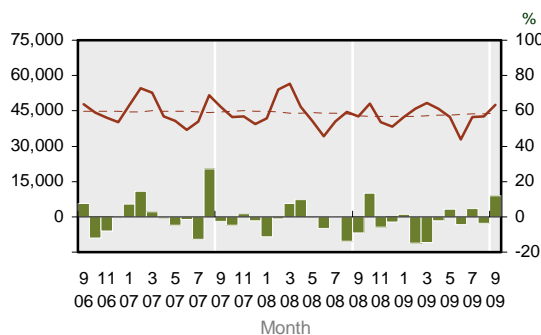
3.25 Hawke's Bay RTO Guest Nights



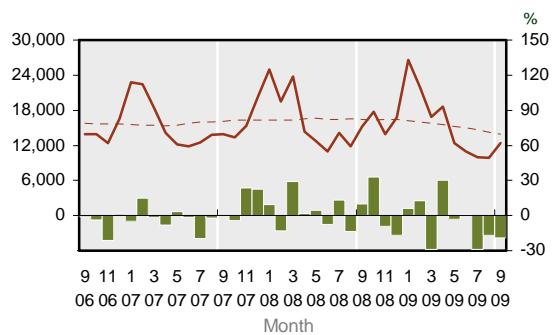
3.26 Ruapehu RTO Guest Nights



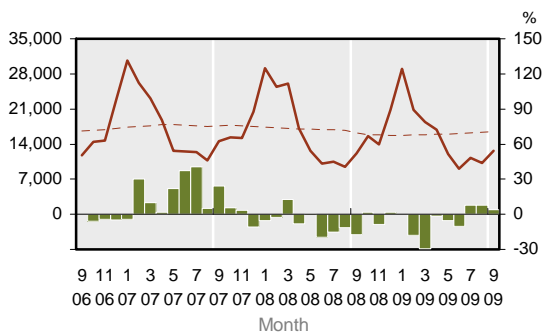
3.27 Manawatu RTO Guest Nights



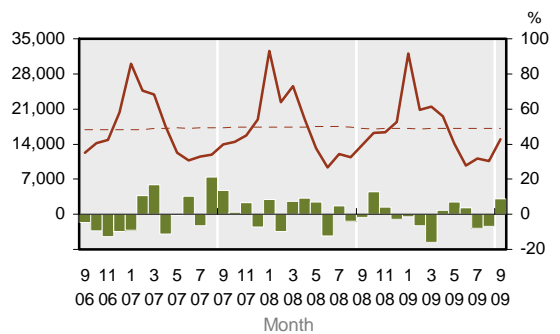
3.28 Wanganui RTO Guest Nights



3.29 Wairarapa RTO Guest Nights



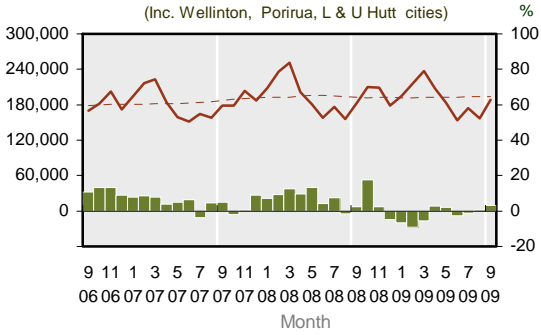
3.30 Kapiti-Horowhenua RTO Guest Nights



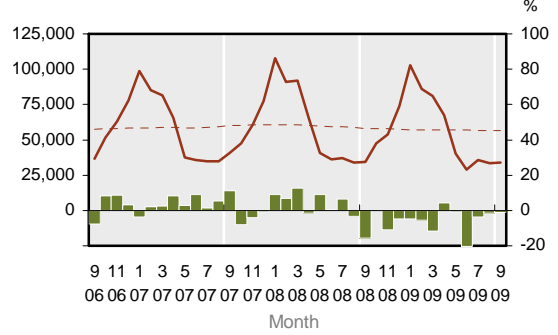
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 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

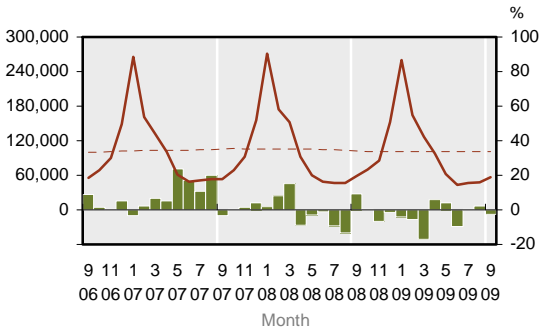
3.31 Wellington RTO Guest Nights



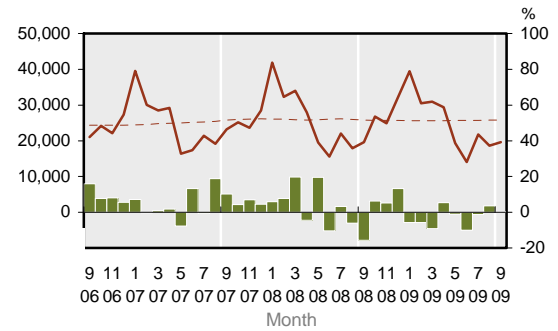
3.32 Marlborough RTO Guest Nights



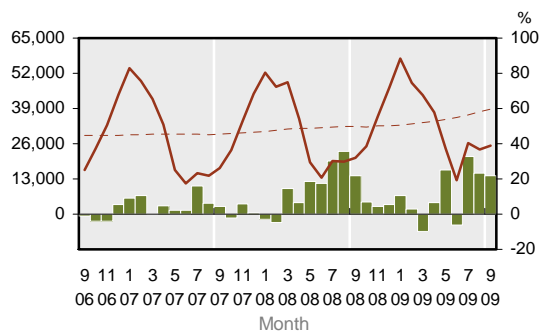
3.33 Nelson-Tasman RTO Guest Nights



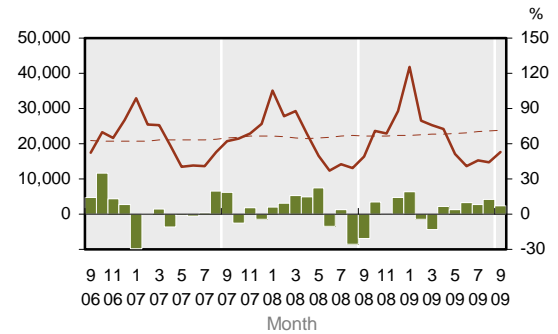
3.34 Hurunui District Guest Nights



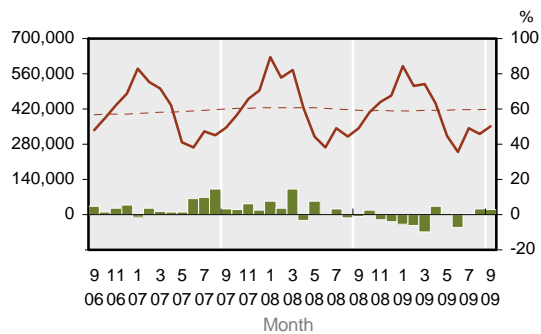
3.35 Mackenzie RTO Guest Nights



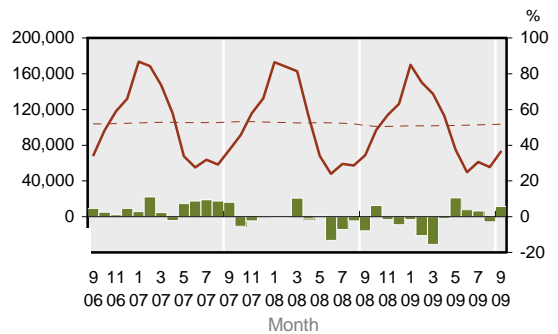
3.36 Timaru RTO Guest Nights



3.37 Combined Canterbury RTOs Guest Nights



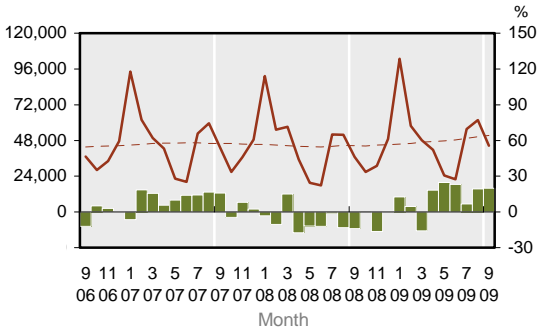
3.38 West Coast RTO Guest Nights



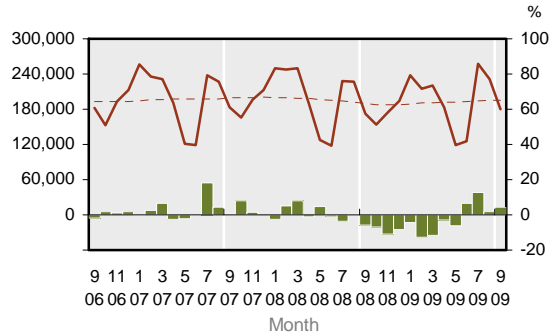
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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

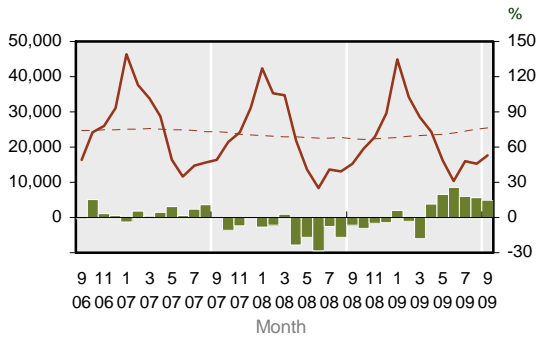
3.39 Wanaka RTO Guest Nights



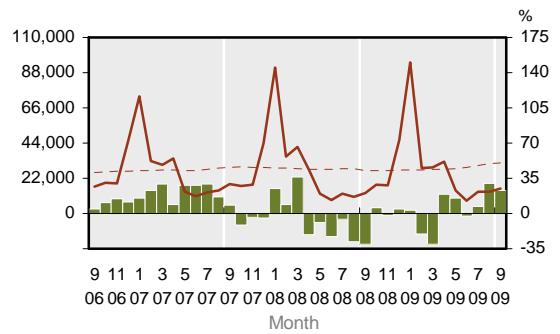
3.40 Queenstown RTO Guest Nights



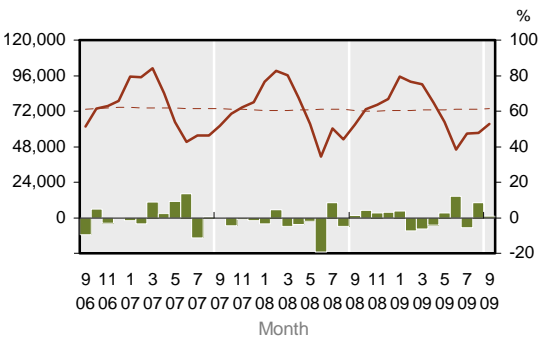
3.41 Waitaki RTO Guest Nights



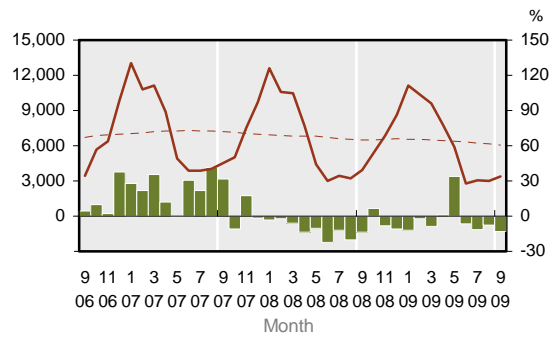
3.42 Central Otago RTO Guest Nights



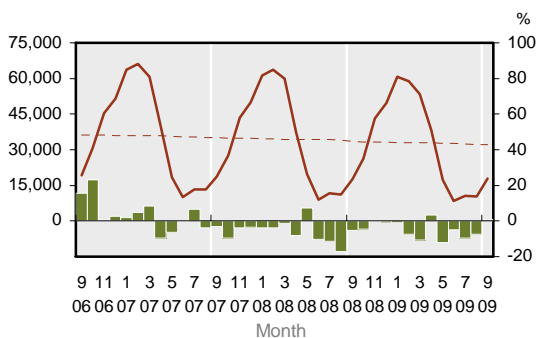
3.43 Dunedin RTO Guest Nights



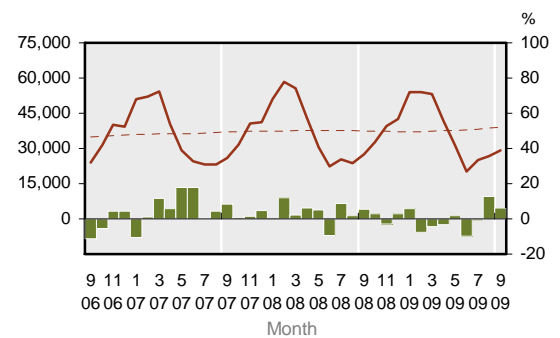
3.44 Clutha District Guest Nights



3.45 Fiordland RTO Guest Nights



3.46 Southland RTO Guest Nights



Note: Total guest night data by international and domestic guests are available only for the months of Jan, Apr, Jul and Oct.

KEY: Solid line (brown) – show statistics described by the graph title (left scale).
 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

EXPLANATORY NOTES

Inbound Tourism

This information refers to international visitors who arrive in New Zealand intending to stay for a short-term period of less than 12 months. Statistics are from passenger arrival cards collected at various NZ international airports and seaports. Data is processed by Statistics New Zealand and is partly sponsored by the Ministry of Tourism. Statistics are available monthly.

Outbound Tourism

This information refers to NZ residents who went on overseas trips for a short-term period of less than 12 months. Statistics are from passenger departure cards collected at various NZ international airports and seaports. Data is processed by Statistics New Zealand and is partly sponsored by the Ministry of Tourism. Statistics are available monthly.

Commercial Accommodation

Statistics are obtained from the Accommodation Survey (commonly referred to as CAM – Commercial Accommodation Monitor) conducted by Statistics New Zealand and sponsored by the Ministry of Tourism. The survey covers those commercial accommodation providers that are GST-registered and have a turnover of at least \$30,000 a year. Those smaller providers that do not meet these criteria or provide accommodation as a secondary business activity (e.g. farm-stay) are excluded from the survey. Data collected include - number of establishments, guests, nights stayed, and international and domestic guests.

International Visitor Expenditure

This information is obtained from the International Visitor Survey (IVS, conducted by The Nielsen Company for the Ministry of Tourism). The survey covers an annual sample of 5,000 departing overseas visitors aged 15 years or over who are interviewed at the Auckland, Wellington and Christchurch international airports. Data collected include - visitor demographics, places visited, tourism activities undertaken and expenditure in New Zealand. IVS statistics are released quarterly.

Domestic Tourism

This information is obtained from the Domestic Travel Survey (DTS, conducted by The Nielsen Company for the Ministry of Tourism). The survey covers an annual sample of 15,000 NZ residents aged 15 years or over who are interviewed via telephone about their travel experience within New Zealand. Data collected include - traveller demographics, day and overnight trips, places visited, tourism activities undertaken and expenditure. DTS statistics are released quarterly.

Tourism Satellite Account

The TSA provides a range of measures on tourism's contribution to the NZ economy. Key measures include tourism expenditure as a proportion of GDP, export earnings, GST and employment. More detailed expenditure measures include breakdown by direct and indirect tourism value added, international and domestic, tourism related product groups. The TSA is produced annually by Statistics New Zealand and sponsored by Ministry of Tourism. The New Zealand TSA has adopted the UNWTO methodology.

Differences between TSA and IVS & DTS

TSA gives a most definitive account of tourism value and is most complete (compared to IVS and DTS). TSA uses IVS and DTS among other data sources for its calculations, but there are some conceptual and coverage differences as outlined below. The values of international and domestic tourism given in TSA are normally greater than those measured in IVS and DTS, as illustrated below, comparing tourism expenditure for year ended March 2008:

TSA (International) = \$9,400m vs IVS = \$6,128m;

TSA (Domestic) = \$12,111m vs DTS = \$7,413m

The key difference in IVS vs TSA is that IVS includes only international visitor expenditure incurred within NZ. This means IVS does not include international airfares paid to NZ carriers (such as Air NZ) before arrival as the travel was undertaken outside NZ. However, prepaid expenditure for items to be used while in NZ is included in IVS, eg tour packages, accommodation, food, etc. In contrast, TSA does include international airfares paid to NZ carriers. Also, in TSA the expenditure of education visitors is calculated separately using more robust data from Statistics NZ and Ministry of Education instead of sample estimate from IVS.

In DTS, it measures domestic travel of households. Therefore, travel expenditure incurred by many business and government organisations are not fully captured in DTS. However, in TSA, Statistics NZ used more robust data to calculate business and government travel expenditure more fully.

TSA measures are calculated for year ended March only, while IVS and DTS data are available quarterly.

Users should exercise caution when using TSA and IVS & DTS expenditure data. They are not directly comparable because of the differences outlined above.

EXPLANATORY NOTES

Growth rate

All growth rates in this monitor refer to the percentage change in a particular variable over the same period (month or quarter) in the previous year. Because tourism variables typically have large seasonal variation it is more meaningful to compare the change in a variable of a reference month/quarter on a year-on-year basis. Caution should be exercised when interpreting growth rates. A large change in growth rate could be due to irregularity or different timing of major annual events which can distort growth patterns significantly (e.g. Easter holidays, major sporting and local events). A negative/low growth rate in one year may be due to exceptional growth rate in the previous year, and vice versa.

Trend line

Trend lines have been provided for variables in graphs under the Trends and Patterns section. A trend line helps identify more clearly the general direction and pace of change that may not be apparent in seasonal time series as in tourism variables.

The trend lines have been calculated using a 'moving average' method. Each trend value is calculated centred on 13 data points for monthly series and 5 data points for quarterly series. Equal weight (1/12 for monthly and 1/4 for quarterly series) is applied to all data points except at both ends of the period that are given half the normal weight. Furthermore, for monthly series, in order to calculate the trend values for the last 6 months of a time series it requires forward estimates of the variable for next six months. These estimates are derived by assuming that their growth rates are generally the average for the preceding 3 months. Similarly, for quarterly series, forward estimates are required for two quarters which are assumed to have an average growth rate for the previous two quarters. Because of the assumptions used the trend values for the latest 6 months in a monthly series and latest 2 quarters in a quarterly series are provisional and are subject to revision as later data become available.

Sources of Statistics

All statistics in this publication are drawn from the following sources:

1. Inbound Tourism : "*International Travel and Migration*", Statistics New Zealand
2. Outbound Tourism : "*International Travel and Migration*", Statistics New Zealand
3. Accommodation : "*Accommodation Survey*", Statistics New Zealand
4. International Visitor Expenditure : "*International Visitor Survey*", Ministry of Tourism
5. Domestic Tourism : "*Domestic Travel Survey*", Ministry of Tourism
6. Tourism Satellite Account : "*Tourism Satellite Account, 2009*", Statistics New Zealand
7. Forecasts : Ministry of Tourism
 - *New Zealand Tourism Forecasts, 2009-2015 (Summary Document)*
 - *New Zealand Regional Tourism Forecasts, 2009-2015*

For further information contact:

- a. Ministry of Tourism, t: (04) 498 7440, <http://www.tourismresearch.govt.nz>
- b. Statistics New Zealand, t: (04) 9314600, <http://www.stats.govt.nz/tourism>
- c. Tourism New Zealand, t: (04) 917 5400, <http://www.tourismnewzealand.com>

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