



TOURISM LEADING INDICATORS MONITOR

SERIES 2009/09 **OCTOBER 2009** NEW ZEALAND

This edition provides new data on:

- Tourism Satellite Account YE Mar 09
- Inbound and Outbound Travel Sep 09
- Commercial Accommodation Aug 09

It highlights the latest Tourism Satellite Account results, showing the economic value of the New Zealand tourism industry in 2009.

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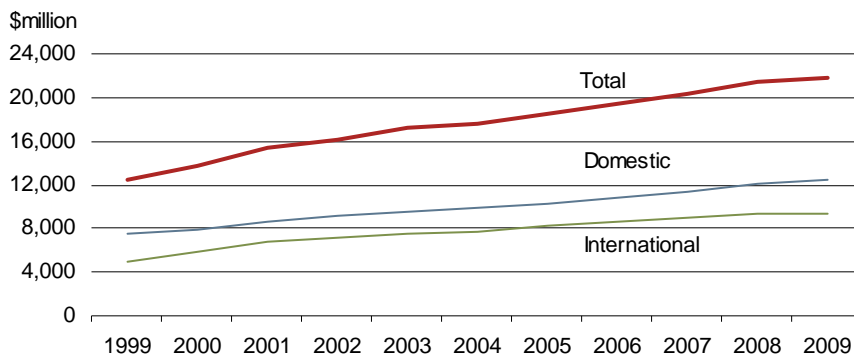
COMMENTARY

New Zealand Tourism - \$21.7 billion industry in 2009

The latest Tourism Satellite Account (TSA) for the 2009 March year, released by Statistics New Zealand, shows that total tourism expenditure continued to grow, reaching \$21.7 billion, up by \$226 million or 1.1% from the previous year. This was achieved by a 2.6% increase in domestic tourism spend which more than offset a 0.9% decrease in international visitor spend (Figure 1).

This is a reasonable result in light of the severe global recession and a very challenging time for tourism businesses. It demonstrates the resilience of tourism, and highlights the importance of domestic tourism in compensating for the downturn in international tourism.

Figure 1: Tourism Expenditure by International and Domestic Tourists
Year ended March 1999-2009

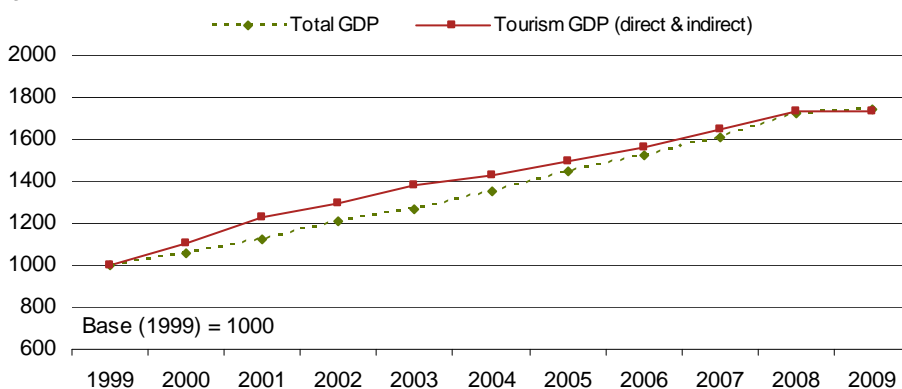


\$21.7 billion of tourism expenditure in 2009, 57% by domestic tourists and 43% by international tourists.

Tourism plays an important role in the New Zealand economy. It directly and indirectly contributes 9.1% to total Gross Domestic Product (GDP) and 9.6% of employment (185,000 full-time equivalent jobs). Tourists contributed \$1.6 billion in GST revenue to government.

Over the last ten years, tourism industry GDP grew by 73% (average of 5.8% per annum) similar to total New Zealand GDP growth. Figure 2 shows indices of direct and indirect tourism GDP and the GDP of the whole economy. This highlights that tourism has consistently been a positive contributor to the New Zealand economy, particularly in the early 2000s period.

Figure 2: Growth Indices of Tourism and Total GDP, Year Ended March 1999-2009

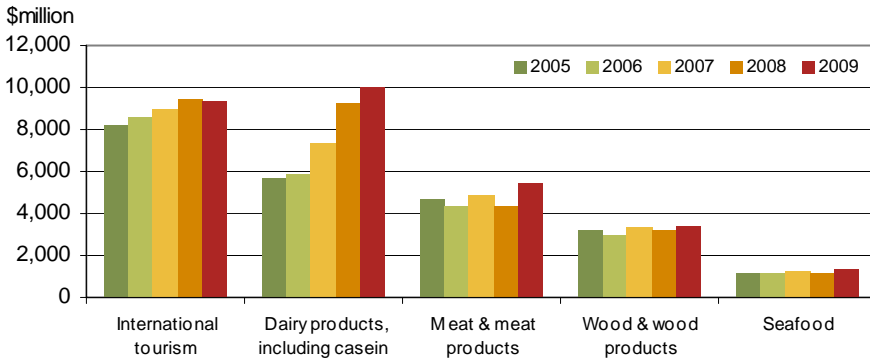


Tourism is a positive contributor to New Zealand's GDP growth.

International tourists spent \$9,313 million in New Zealand, or 16.4% of total export earnings (Figure 3). It is now the second largest export earner, surpassed only by dairy exports at \$9,975 million (17.6% of total export). This reversal of position was due to the dairy exports having experienced a sharp increase in revenue over the last two years (up by 36% or \$2,642 million) driven by a large increase in export commodity prices of dairy products (up by 63%), despite lower export volumes.

COMMENTARY

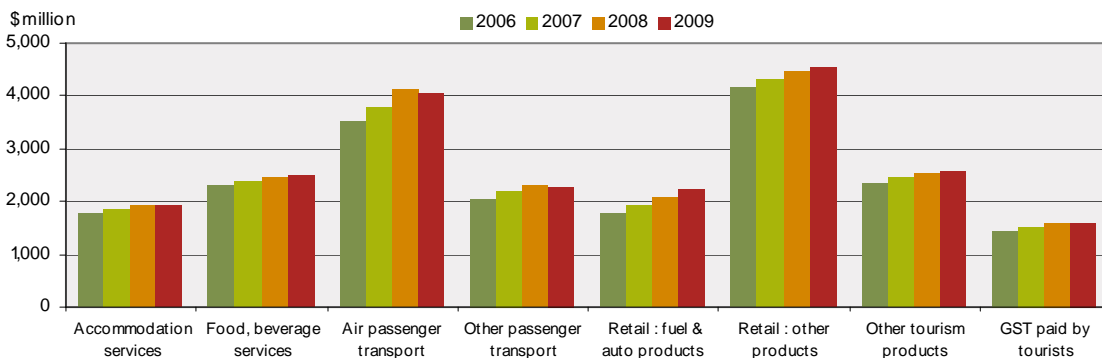
Figure 3: Export Earnings - Tourism and Selected Sectors, Year Ended March 2005-2009



16.4% of New Zealand's export earnings are from international tourism.

Figure 4 shows how tourists spent their money on various product types. Of the \$21.7 billion spent in 2009, the majority (\$8.6b or 39%) was spent on transport-related items such as air transport, other transport, fuel and automotive products. Tourists also spent \$4.6b (21%) on general retail products, \$2.5b (11.5%) on eating out, \$1.9b (8.9%) on accommodation, and \$2.6b (11.9%) on such tourism products as activities and attractions. Most product groups increased in 2009, except for 'air transport' and 'other passenger transport' which decreased by 1.4% and 1.1% respectively, due to lower international demand and sharp pricing.

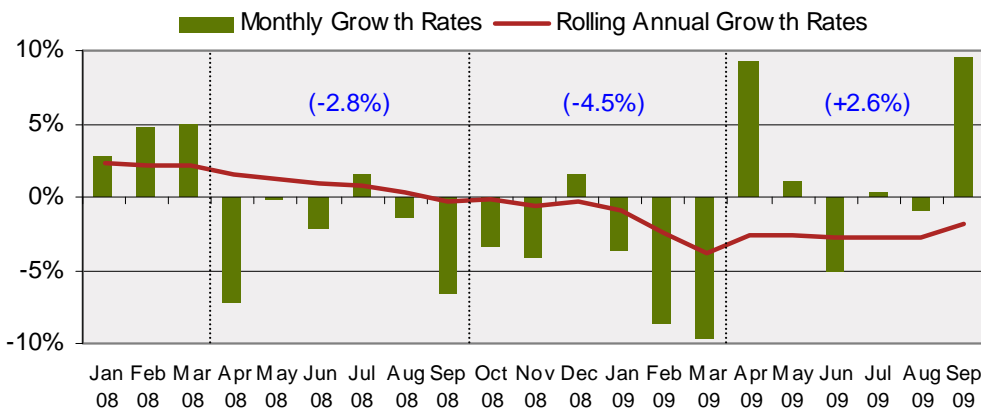
Figure 4: Tourism Expenditure by Product Type, 2006-2009



Transport activity accounted for 39% of tourism expenditure.

The outlook for international visitor arrivals is looking more positive. For the six months to September 2009, international arrivals increased by 2.6%, and it is likely that there will be a gradual improvement over the next six months as key markets move out of recession. However, significant risks continue to exist, including overall economic conditions, exchange rates and the potential outbreaks of Influenza A (H1N1) in the northern hemisphere winter that may affect travel demand, including to New Zealand.

Figure 5: International Visitor Arrivals – Monthly and Annual Growth Rate



Inbound tourism to New Zealand increased by 2.6% over the past six months.

1. INBOUND TOURISM

International Visitor Arrivals, September 2009 - In the month of September 2009 there were 172,400 international visitor arrivals, up by 9.3% (14,700) compared to September 2008.

Markets – Visitors from Australia (up 12,600 or 15.4%) recorded the largest increase in September 2009, partly due to greater visitors for the All Blacks vs. Wallabies rugby test in Wellington. This was followed by the United States (up 900 or 9.9%), China (up 850 or 15.4%), Indonesia (up 790 or 74.7%) and Thailand (up 300 or 34.6%).

In contrast, there were fewer visitors from South Korea (down 1,500 or 33.5%), South Africa (down 500 or 30.0%), Japan (down 230 or 3.5%), Ireland (down 220 or 20.1%) and Samoa (down 190 or 13.2%).

Purpose - There were more visitors on holiday (up 11,200 or 15.2%) and visiting friends and relatives (up 4,300 or 9.5%) in September 2009 compared to September 2008, while there were fewer visitors on business (down 1,300 or 6.6%).

Duration – In September 2009, the average length of stay of visitors was 20.0 days, the same as August 2008. The total number of visitor days increased by 9.7% (304,200) to 3.43 million.

Flights – There were 2,391 flight-arrivals in September 2009, 40 flights or 1.7% more than in September 2008.

Annual Arrivals – For the year ended September 2009, there were 2.425 million international visitor arrivals, down by 43,900 or 1.8% on the previous year.

Total visitor days were down by 4.1% to 49.33 million, with the average length of stay down 0.5 day to 20.4 days.

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

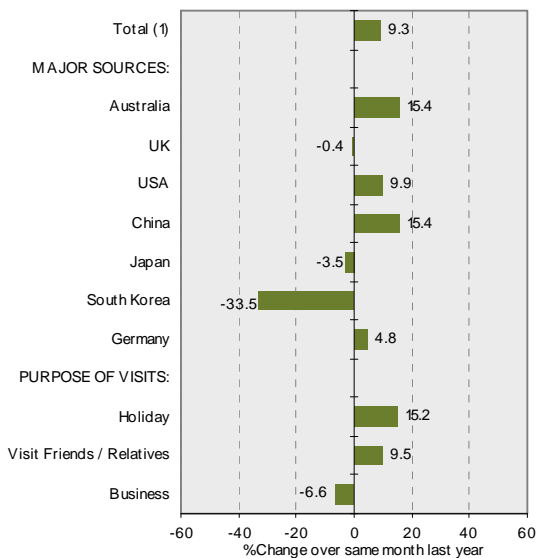
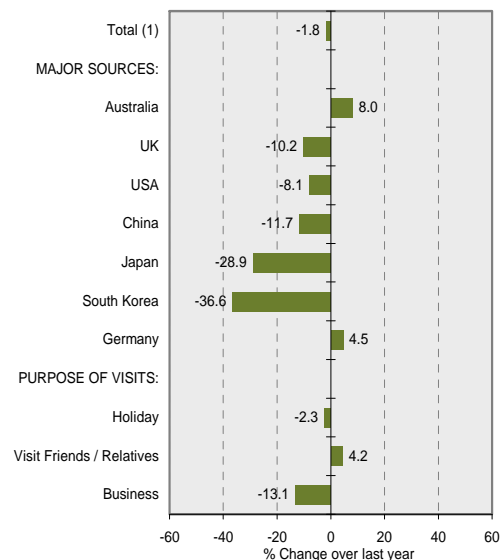


Figure 1b **Growth Rate of International Visitor Arrivals (Year Ended September 2009)**



1. INBOUND TOURISM

Table 1a International Visitor Arrivals (Month)

| SEPTEMBER MONTH | International Visitor Arrivals | | | Growth Rate (%) | |
|---------------------------------------|--------------------------------|---------|---------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| Total (1) | 168,838 | 157,704 | 172,425 | -6.6 | 9.3 |
| MAJOR SOURCES: | | | | | |
| Australia | 84,525 | 82,317 | 94,962 | -2.6 | 15.4 |
| UK | 11,178 | 10,580 | 10,542 | -5.3 | -0.4 |
| USA | 10,327 | 9,131 | 10,038 | -11.6 | 9.9 |
| China | 8,234 | 5,497 | 6,342 | -33.2 | 15.4 |
| Japan | 8,326 | 6,486 | 6,258 | -22.1 | -3.5 |
| South Korea | 6,601 | 4,577 | 3,045 | -30.7 | -33.5 |
| Germany | 2,921 | 3,105 | 3,255 | 6.3 | 4.8 |
| PURPOSE OF VISITS: | | | | | |
| Holiday | 82,110 | 73,646 | 84,861 | -10.3 | 15.2 |
| Visit Friends / Relatives | 44,781 | 45,103 | 49,371 | 0.7 | 9.5 |
| Business | 20,884 | 20,056 | 18,732 | -4.0 | -6.6 |
| INTERNATIONAL ARRIVAL FLIGHTS: | | | | | |
| Passenger Flights | 2,303 | 2,351 | 2,391 | 2.1 | 1.7 |

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

Table 1b International Visitor Arrivals (Year)

| YEAR ENDED SEPTEMBER | International Visitor Arrivals | | | Growth Rate (%) | |
|---------------------------------------|--------------------------------|-----------|-----------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| Total (1) | 2,475,253 | 2,469,064 | 2,425,192 | -0.3 | -1.8 |
| MAJOR SOURCES: | | | | | |
| Australia | 940,235 | 967,648 | 1,045,447 | 2.9 | 8.0 |
| UK | 301,521 | 289,247 | 259,639 | -4.1 | -10.2 |
| USA | 217,803 | 215,041 | 197,730 | -1.3 | -8.1 |
| China | 118,372 | 117,605 | 103,842 | -0.6 | -11.7 |
| Japan | 126,002 | 112,152 | 79,690 | -11.0 | -28.9 |
| South Korea | 107,909 | 86,755 | 55,033 | -19.6 | -36.6 |
| Germany | 59,600 | 60,884 | 63,598 | 2.2 | 4.5 |
| PURPOSE OF VISITS: | | | | | |
| Holiday | 1,222,730 | 1,196,203 | 1,168,247 | -2.2 | -2.3 |
| Visit Friends / Relatives | 706,971 | 735,691 | 766,882 | 4.1 | 4.2 |
| Business | 272,655 | 263,397 | 228,905 | -3.4 | -13.1 |
| INTERNATIONAL ARRIVAL FLIGHTS: | | | | | |
| Passenger Flights | 27,888 | 28,376 | 28,980 | 1.7 | 2.1 |

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

2. OUTBOUND TOURISM

Departures, September 2009 - In the month of September 2009, New Zealand residents undertook 193,300 short-term overseas trips, up by 1,200 or 0.6% compared to September 2008.

Destinations - There were more trips to Australia (up 3,200 or 3.6%), Fiji (up 1,700 or 15.5%), India (up 730 or 46.9%), China (up 450 or 8.8%) and Thailand (up 330 or 11.1%).

In contrast, there were fewer trips to the United States (down 1,900 or 16.4%), France (down 560 or 22.2%), Canada (down 540 or 23.9%), Hong Kong (down 460 or 25.9%) and Italy (down 420 or 18.4%).

Purpose – There were more New Zealanders visiting friends and relatives (up 5,600 or 10.2%) in September 2009 compared to September 2008, but fewer on holiday (down 1,500 or 1.7%) and on business (down 960 or 3.9%).

Duration - The average length of trips in September 2009 was 17.0 days, 0.1 day shorter than in September 2008.

Annual Departures – There were 1.917 million trips undertaken in the year ended September 2009, down by 58,700 or 3.0% on the previous year.

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

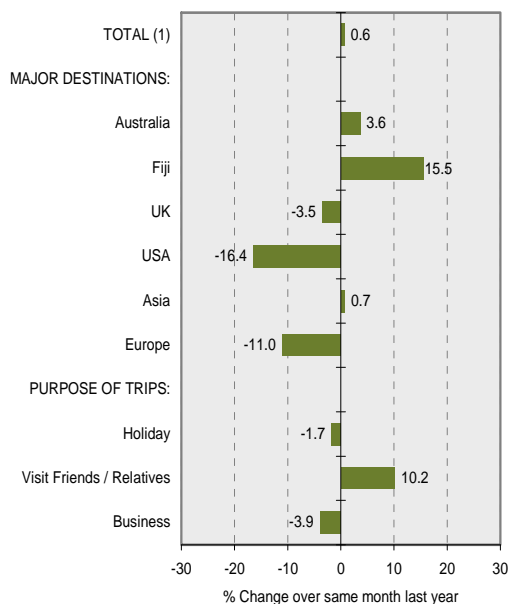
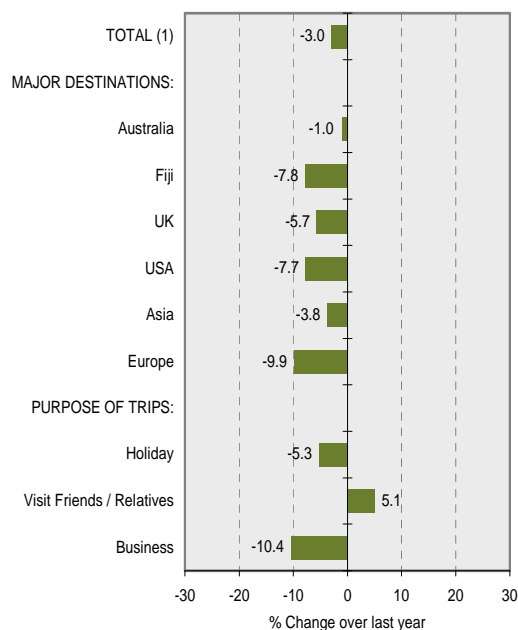


Figure 2b **Growth Rate of Trips Abroad by NZ Residents (Year Ended September 2009)**



2. OUTBOUND TOURISM

Table 2a Trips Abroad by NZ Residents (Month)

| SEPTEMBER MONTH | Trips Abroad by NZ Residents | | | Growth Rate (%) | |
|----------------------------|------------------------------|---------|---------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| TOTAL (1) | 208,467 | 192,020 | 193,267 | -7.9 | 0.6 |
| MAJOR DESTINATIONS: | | | | | |
| Australia | 99,792 | 89,856 | 93,075 | -10.0 | 3.6 |
| Fiji | 11,637 | 10,800 | 12,475 | -7.2 | 15.5 |
| UK | 11,907 | 10,152 | 9,800 | -14.7 | -3.5 |
| USA | 10,854 | 11,367 | 9,500 | 4.7 | -16.4 |
| Asia | 24,165 | 22,518 | 22,675 | -6.8 | 0.7 |
| Europe | 24,435 | 20,817 | 18,525 | -14.8 | -11.0 |
| PURPOSE OF TRIPS: | | | | | |
| Holiday | 102,897 | 88,965 | 87,425 | -13.5 | -1.7 |
| Visit Friends/ Relatives | 55,242 | 55,215 | 60,825 | 0.0 | 10.2 |
| Business | 25,380 | 24,408 | 23,450 | -3.8 | -3.9 |

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

Table 2b Trips Abroad by NZ Residents (Year)

| YEAR ENDED SEPTEMBER | Trips Abroad by NZ Residents | | | Growth Rate (%) | |
|----------------------------|------------------------------|-----------|-----------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| TOTAL (1) | 1,943,404 | 1,975,990 | 1,917,265 | 1.7 | -3.0 |
| MAJOR DESTINATIONS: | | | | | |
| Australia | 967,228 | 950,195 | 940,891 | -1.8 | -1.0 |
| Fiji | 96,719 | 99,155 | 91,373 | 2.5 | -7.8 |
| UK | 95,295 | 93,806 | 88,453 | -1.6 | -5.7 |
| USA | 90,025 | 95,204 | 87,857 | 5.8 | -7.7 |
| Asia | 244,171 | 256,979 | 247,273 | 5.2 | -3.8 |
| Europe | 172,825 | 172,999 | 155,827 | 0.1 | -9.9 |
| PURPOSE OF TRIPS: | | | | | |
| Holiday | 815,391 | 825,136 | 781,014 | 1.2 | -5.3 |
| Visit Friends/ Relatives | 608,926 | 628,114 | 660,235 | 3.2 | 5.1 |
| Business | 289,203 | 286,907 | 256,935 | -0.8 | -10.4 |

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

3. COMMERCIAL ACCOMMODATION

Guest Nights, August 2009 - In the month of August 2009, a total of 2,047,453 guest nights were spent in commercial accommodation, a decrease of 150 nights (or 0.01%) from August 2008.

The North Island recorded a decrease (down 37,400 or 3.1%) and the South Island recorded an increase (up 37,300 or 4.4%) in guest nights in August 2009.

International and Domestic - In August 2009, guest nights comprised 61.5% domestic guests (1.26 million) and 38.5% international guests (788,000). International guest nights increased by 0.1% (490) and domestic guest nights decreased by 0.1% (640).

Accommodation Types – Four of the five accommodation types recorded an increase in guest nights in August 2009. Motels recorded the largest increase (up 7,500 or 1.1%), followed by caravan parks/camping grounds (up 4,800 or 2.2%), hotels (up 1,700 or 0.2%) and hosted accommodation (up 1,600 or 6.1%).

Backpackers recorded the only decrease in guest nights in August 2009 (down 15,700 or 5.3%).

Occupancy - The overall occupancy rate of accommodation establishments in August 2009 was 28.9%, down 1.3 percentage point compared to 30.2% in August 2008.

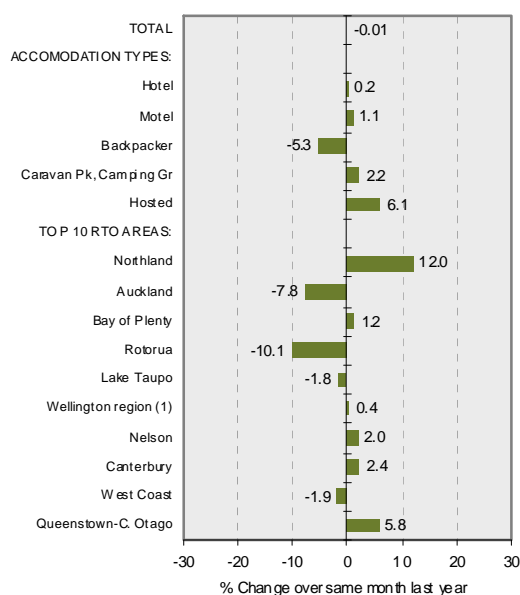
Hosted (17.7%, up 2.1 points) recorded the only increase in occupancy. Backpackers recorded the largest decrease in occupancy (31.7%, down 2.2 points), followed by hosted (17.7%, down 2.1 points), hotels (49.0, down 1.9 points) and camping parks/caravan grounds (7.3%, down 0.3 point).

RTOs - In August 2009 Queenstown/Central Otago recorded the largest increase in guest nights (up 16,800 or 5.8%) from August 2008. This was followed by Northland (up 7,100 or 12.0%), Canterbury (up 6,600 or 2.4%), Mackenzie/Timaru (up 6,400 or 19.4%), Ruapehu (up 4,600 or 8.6%), Dunedin/Clutha (up 4,100 or 7.2%), Hawke's Bay (up 2,900 or 6.1%) , Southland (up 2,300 or 6.5%), Eastland (up 2,200 or 15.1%) and Waitaki (up 1,700 or 11.9%).

Auckland recorded the largest decrease (down 32,500 or 7.8%), followed by Rotorua (down 11,300 or 10.1%), Waikato (down 4,300 or 5.8%), Taranaki (down 3,200 or 5.8%), Wanganui (down 2,000 or 16.7%), Palmerston North (down 1,300 or 3.4%), Lake Taupo (down 1,200 or 1.8%), West Coast (down 1,100 or 1.9%) and Manawatu (down 1,100 or 8.8%)

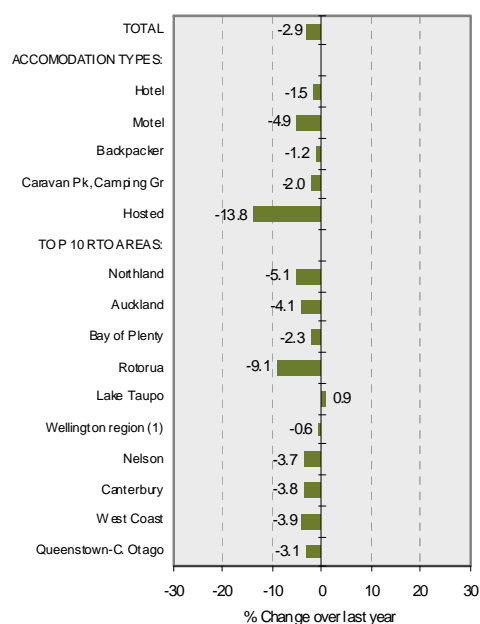
Annual - For the year ended August 2009, there was a total demand of 32.17 million guest nights, down by 0.95 million or 2.9% on the previous year.

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



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

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



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

3. COMMERCIAL ACCOMMODATION

Table 3a Guest Nights (Month)

| AUGUST MONTH | Guest Nights | | | Growth Rate (%) | |
|-----------------------------|--------------|-----------|-----------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| TOTAL | 2,130,829 | 2,047,607 | 2,047,453 | -3.9 | -0.01 |
| ACCOMMODATION TYPES: | | | | | |
| Hotel | 769,230 | 800,791 | 802,483 | 4.1 | 0.2 |
| Motel | 790,533 | 707,992 | 715,467 | -10.4 | 1.1 |
| Backpacker | 300,748 | 296,895 | 281,203 | -1.3 | -5.3 |
| Caravan Pk, Camping Gr | 241,606 | 215,849 | 220,638 | -10.7 | 2.2 |
| Hosted | 28,711 | 26,081 | 27,661 | -9.2 | 6.1 |
| TOP 10 RTO AREAS: | | | | | |
| Northland | 76,115 | 59,262 | 66,356 | -22.1 | 12.0 |
| Auckland | 417,698 | 418,307 | 385,855 | 0.1 | -7.8 |
| Bay of Plenty | 59,781 | 59,384 | 60,099 | -0.7 | 1.2 |
| Rotorua | 113,470 | 111,917 | 100,643 | -1.4 | -10.1 |
| Lake Taupo | 65,751 | 63,477 | 62,306 | -3.5 | -1.8 |
| Wellington region (1) | 167,168 | 163,872 | 164,505 | -2.0 | 0.4 |
| Nelson | 54,218 | 47,049 | 47,983 | -13.2 | 2.0 |
| Canterbury | 286,833 | 281,507 | 288,154 | -1.9 | 2.4 |
| West Coast | 59,280 | 57,605 | 56,501 | -2.8 | -1.9 |
| Queenstown-C. Otago | 303,678 | 291,984 | 308,815 | -3.9 | 5.8 |

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

Table 3b Guest Nights (Year)

| YEAR ENDED AUGUST | Guest Nights | | | Growth Rate (%) | |
|-----------------------------|--------------|------------|------------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| TOTAL | 32,777,149 | 33,126,177 | 32,173,375 | 1.1 | -2.9 |
| ACCOMMODATION TYPES: | | | | | |
| Hotel | 10,297,713 | 10,666,305 | 10,510,469 | 3.6 | -1.5 |
| Motel | 10,991,441 | 10,777,805 | 10,249,953 | -1.9 | -4.9 |
| Backpacker | 4,502,464 | 4,585,809 | 4,529,543 | 1.9 | -1.2 |
| Caravan Pk, Camping Gr | 6,404,163 | 6,520,692 | 6,387,131 | 1.8 | -2.0 |
| Hosted | 581,368 | 575,567 | 496,278 | -1.0 | -13.8 |
| TOP 10 RTO AREAS: | | | | | |
| Northland | 1,787,419 | 1,728,593 | 1,641,210 | -3.3 | -5.1 |
| Auckland | 5,542,759 | 5,739,841 | 5,503,774 | 3.6 | -4.1 |
| Bay of Plenty | 1,267,067 | 1,262,190 | 1,233,614 | -0.4 | -2.3 |
| Rotorua | 1,862,888 | 1,880,289 | 1,709,772 | 0.9 | -9.1 |
| Lake Taupo | 1,050,448 | 983,708 | 992,104 | -6.4 | 0.9 |
| Wellington region (1) | 2,339,623 | 2,467,652 | 2,453,280 | 5.5 | -0.6 |
| Nelson | 1,262,224 | 1,280,780 | 1,233,598 | 1.5 | -3.7 |
| Canterbury | 4,338,362 | 4,511,470 | 4,340,212 | 4.0 | -3.8 |
| West Coast | 1,291,484 | 1,289,197 | 1,239,549 | -0.2 | -3.9 |
| Queenstown-C. Otago | 3,273,574 | 3,304,332 | 3,200,457 | 0.9 | -3.1 |

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

Note:

Changes in Accommodation Data from 11 November 2009

When the next release of September 2009 month data on 11 November there will be two changes to the accommodation data.

1. Data for Regional Tourism Organisation (RTO) areas will be updated to the present boundary structure. This replaces the existing set of RTOs that have been based on the old 1996 boundary structure.
2. The "hosted" accommodation type will be removed from the data.

All historical data will be 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.

4. INTERNATIONAL VISITOR EXPENDITURE

Expenditure, Year ended June 2009 - International visitors spent a total of \$6,016 million in New Zealand for the year ended June 2009 (excluding international airfares). This is a decrease of 2.6% (\$161 million) on the previous year.

Markets – The Chinese market recorded the largest increase, up by \$73 million or 28.0%, followed by Germany (up \$45 million or 18.8%).

In contrast, the expenditure by the United Kingdom (down \$188 million or 18.6%), South Korea (down \$58 million or 22.8%), Australia (down \$56 million or 3.3%), the United States (down \$11 million or 1.7%) and Japan (down \$4 million or 0.9%) markets were lower than the previous June year.

Average Spend - The average spend per visitor was \$2,750 up 0.3% on the previous year.

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

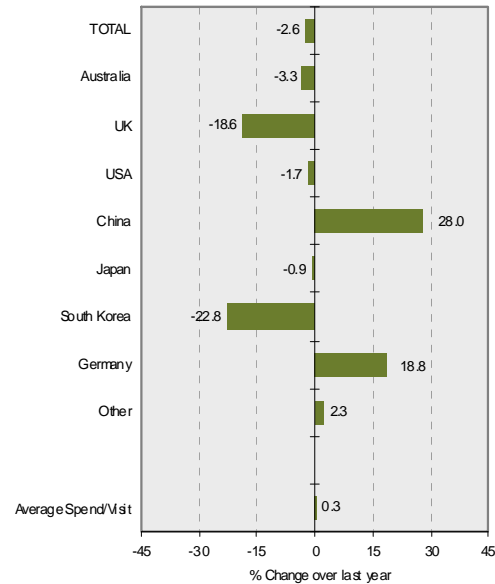


Table 4 **International Visitor Expenditure (Year)**

| YEAR ENDED JUNE | NZ\$million ⁽¹⁾ | | | Growth Rate (%) | |
|---------------------|----------------------------|-------|-------|-----------------|-------|
| | 2007 | 2008 | 2009 | 07-08 | 08-09 |
| TOTAL | 5,902 | 6,177 | 6,016 | 4.7 | -2.6 |
| Australia | 1,453 | 1,694 | 1,637 | 16.5 | -3.3 |
| UK | 892 | 1,014 | 826 | 13.7 | -18.6 |
| USA | 699 | 618 | 608 | -11.5 | -1.7 |
| China | 265 | 261 | 334 | -1.7 | 28.0 |
| Japan | 385 | 426 | 422 | 10.6 | -0.9 |
| South Korea | 240 | 256 | 198 | 6.5 | -22.8 |
| Germany | 262 | 240 | 285 | -8.6 | 18.8 |
| Other | 1,705 | 1,669 | 1,707 | -2.1 | 2.3 |
| Average Spend/Visit | 2,641 | 2,742 | 2,750 | 3.8 | 0.3 |

⁽¹⁾ 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)

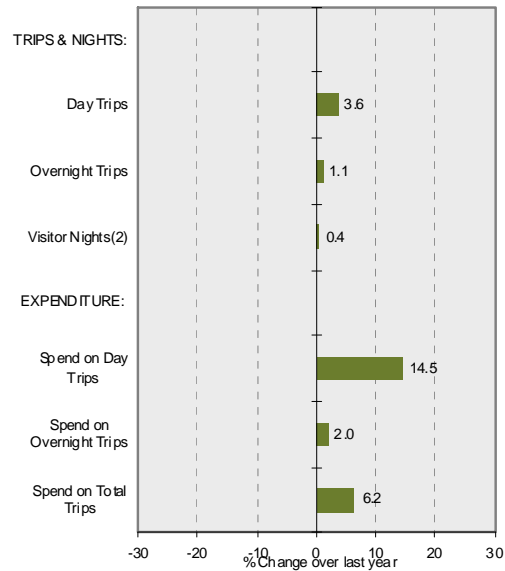


Table 5 Domestic Tourism (Year)

| YEAR ENDED DECEMBER | Domestic Travel ⁽¹⁾ | | | Growth Rate [%] | |
|----------------------------------|--------------------------------|--------|--------|-----------------|-------|
| | 2006 | 2007 | 2008 | 06-07 | 07-08 |
| TRIPS & NIGHTS: (000) | | | | | |
| Day Trips | 29,471 | 27,333 | 28,322 | -7.3 | 3.6 |
| Overnight Trips | 14,739 | 14,896 | 15,064 | 1.1 | 1.1 |
| Visitor Nights ⁽²⁾ | 43,971 | 44,352 | 44,545 | 0.9 | 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) Include 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% |

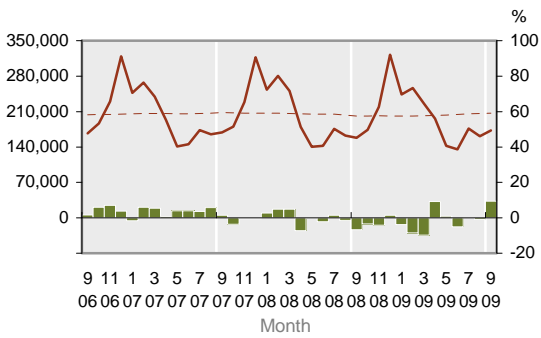
(1) Actual for base year. (2) Figures for domestic visitors in this table refer to all ages (differ to Table 5 which refers to aged 15+).

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

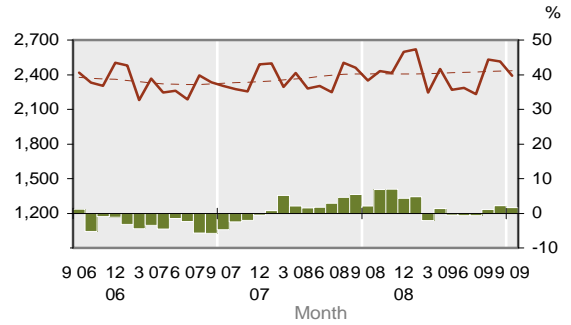
TRENDS AND PATTERNS

1. Inbound Tourism

1.1 International Visitor Arrivals

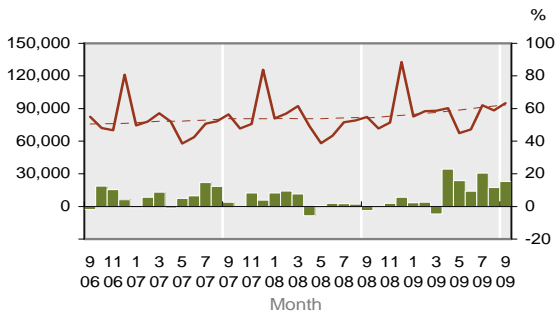


1.2 International Passenger Arrival Flights

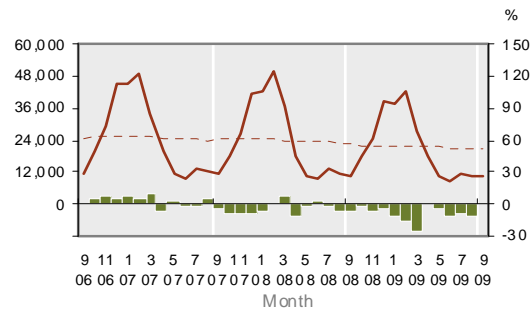


Major Sources

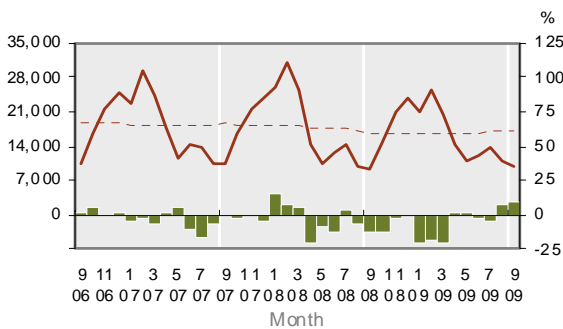
1.3 Visitors from - Australia



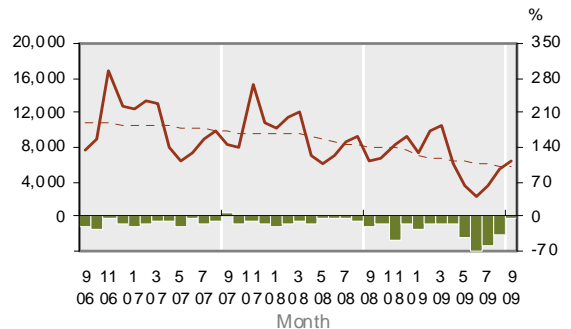
1.4 Visitors from - UK



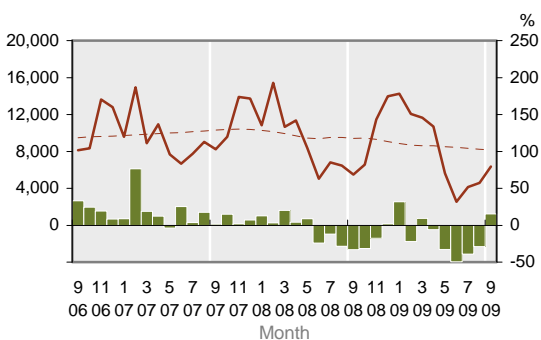
1.5 Visitors from - USA



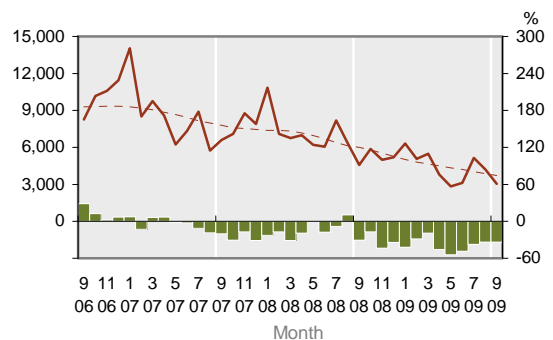
1.6 Visitors from - Japan



1.7 Visitors from - China



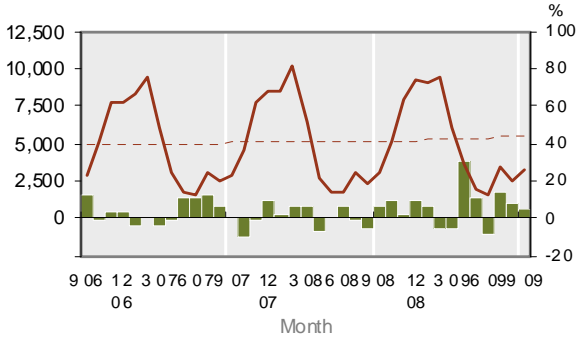
1.8 Visitors from - South Korea



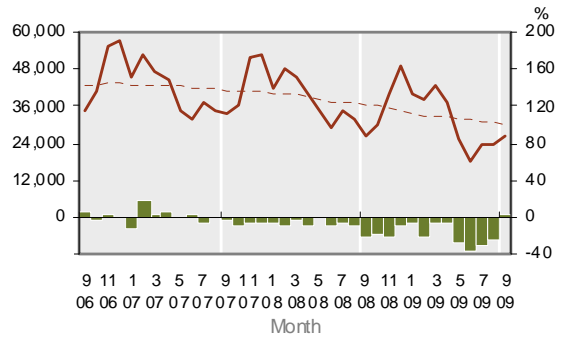
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 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

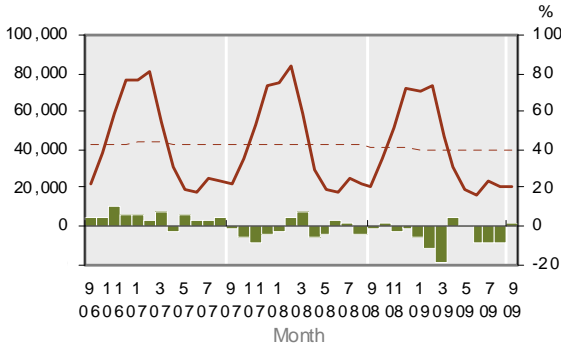
1.9 Visitors from - Germany



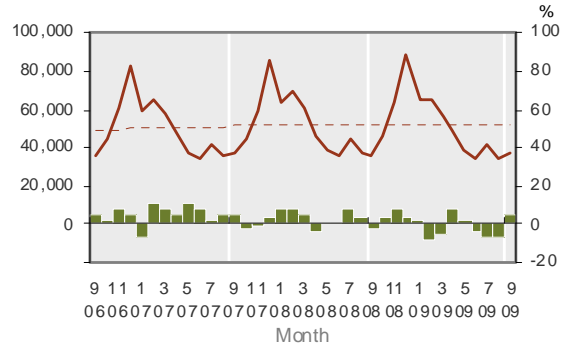
1.10 Visitors from - Asia



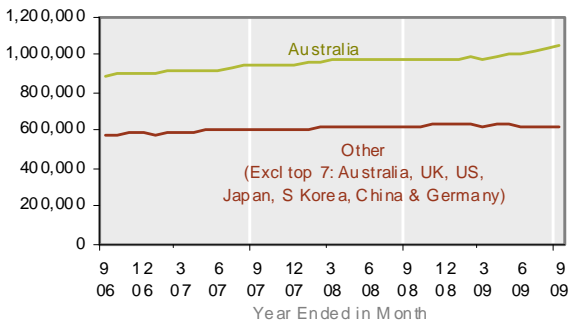
1.11 Visitors from - Europe



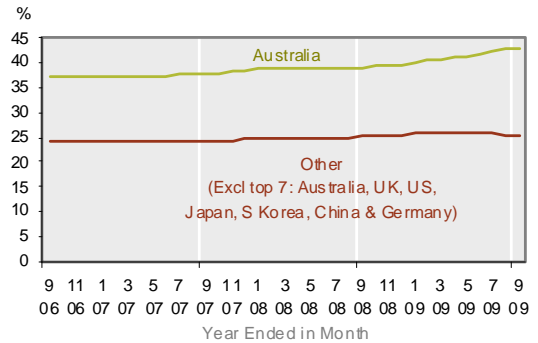
1.12 Visitors from - Other



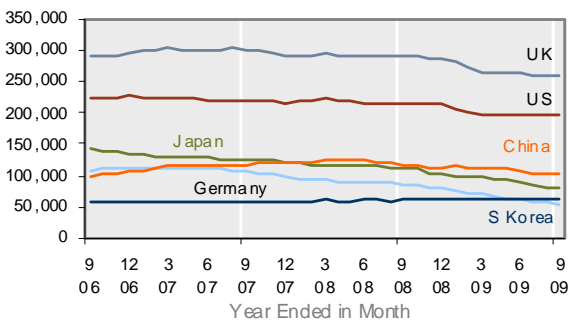
1.13 Visitors by Major Source



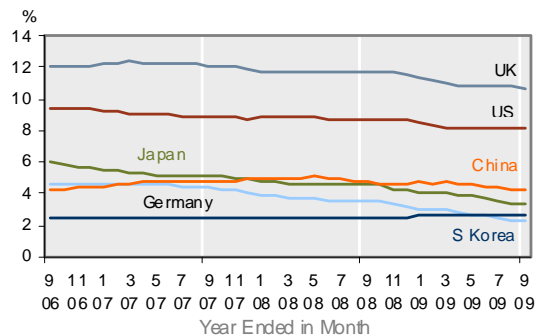
1.14 Share of Total International Visitors (%)



1.15 Visitors by Major Source



1.16 Share of Visitors by Major Source (%)

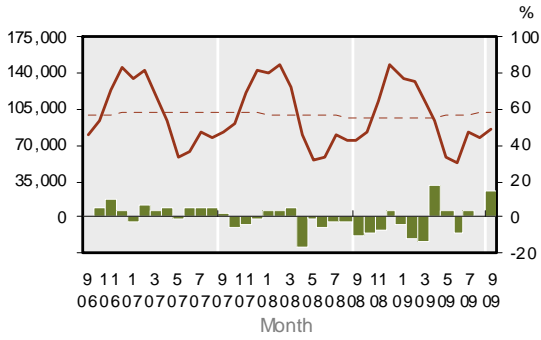


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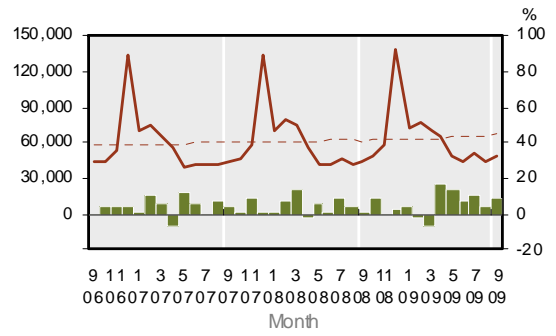
TRENDS AND PATTERNS

Purpose of Visits

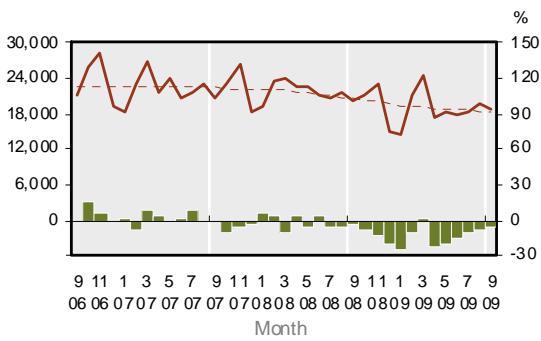
1.17 International Visitors - Holiday



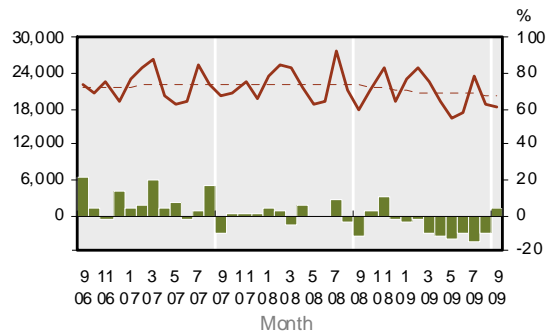
1.18 International Visitors - VFR



1.19 International Visitors - Business



1.20 International Visitors - Other

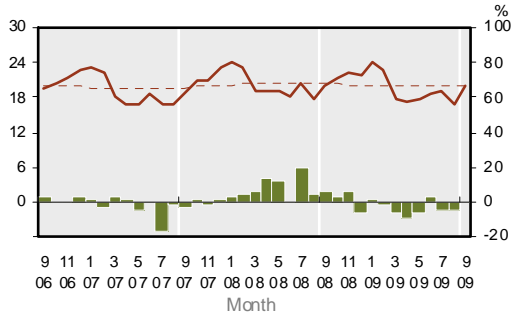


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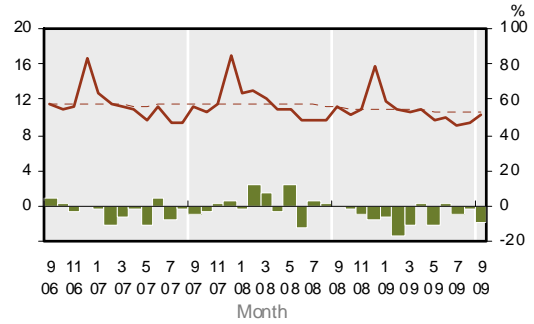
TRENDS AND PATTERNS

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

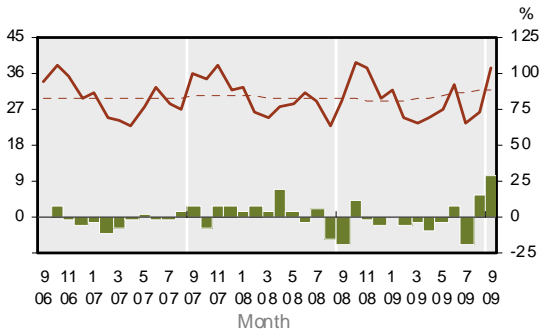
1.21 Average Days of Stay by Visitors



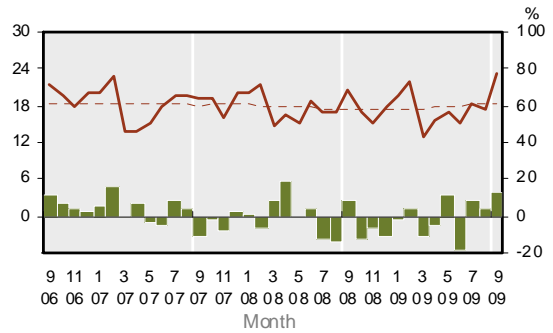
1.22 Average Days Stayed - Australian Visitors



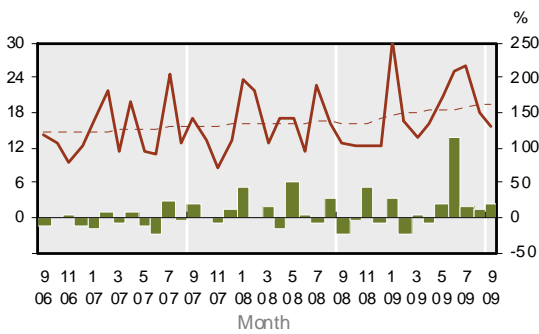
1.23 Average Days Stayed - UK Visitors



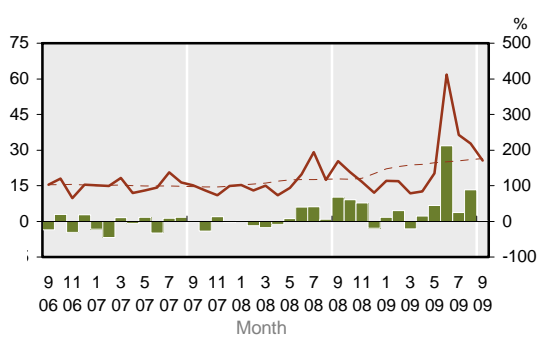
1.24 Average Days Stayed - US Visitors



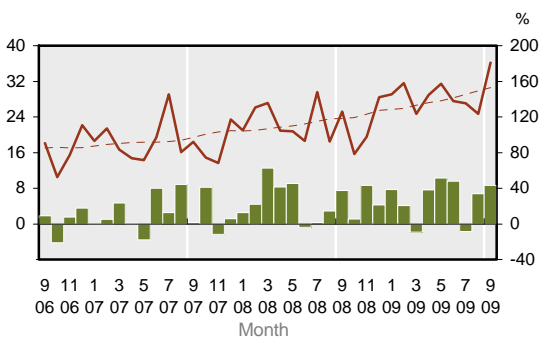
1.25 Average Days Stayed - Japanese Visitors



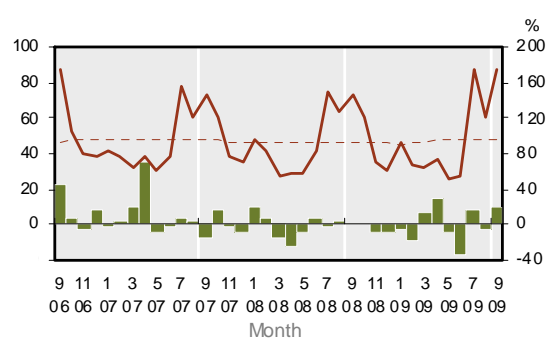
1.26 Average Days Stayed - Chinese Visitors



1.27 Average Days Stayed - S Korea Visitors



1.28 Average Days Stayed - German Visitors



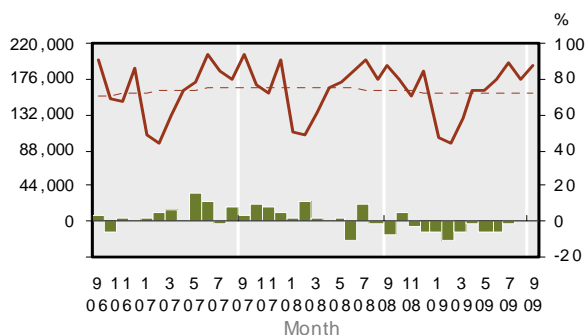
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TRENDS AND PATTERNS

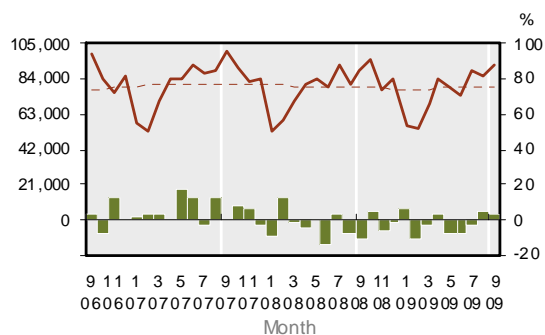
2. Outbound Tourism

Major Destinations

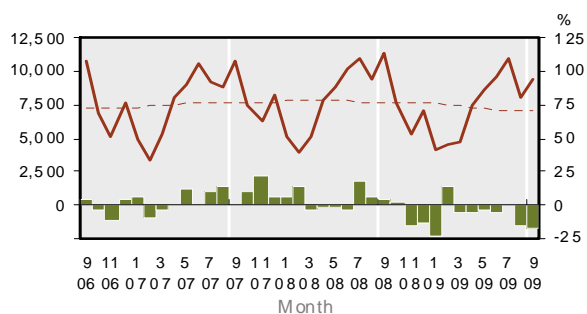
2.1 NZer Trips Abroad



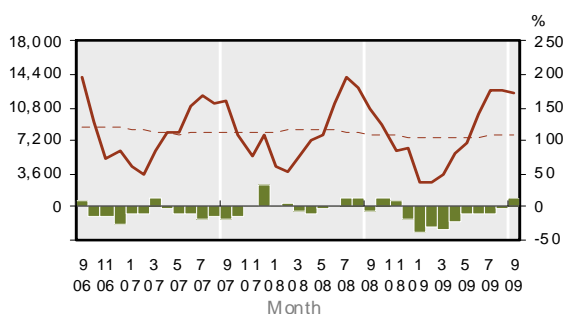
2.2 NZer Trips to - Australia



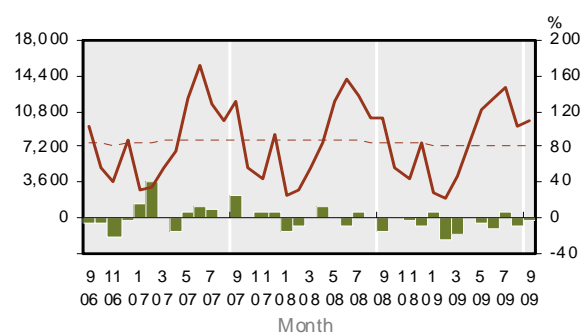
2.3 NZer Trips to - USA



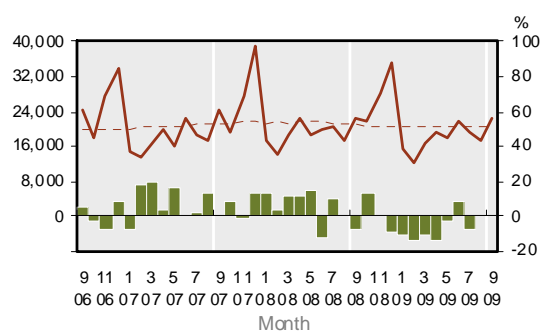
2.4 NZer Trips to - Fiji



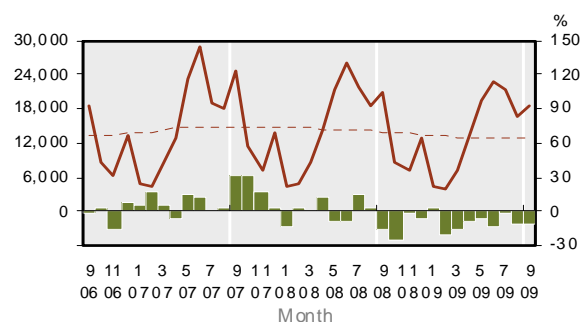
2.5 NZer Trips to - UK



2.6 NZer Trips to - Asia



2.7 NZer Trips to - Europe

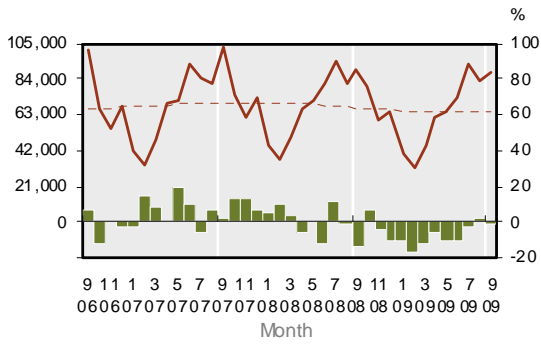


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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

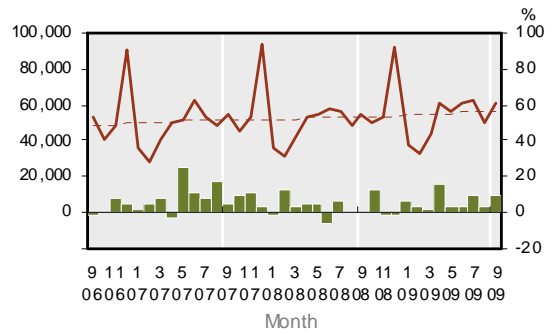
TRENDS AND PATTERNS

Purpose of Trips Abroad

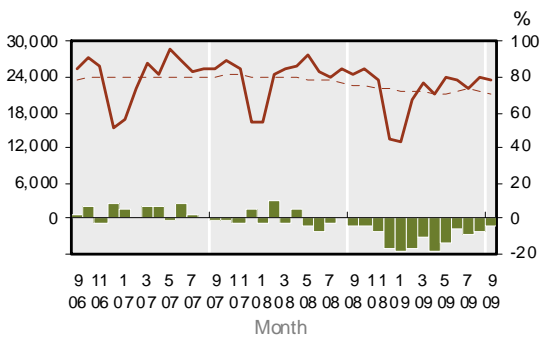
2.8 NZer Trips Abroad - Holiday



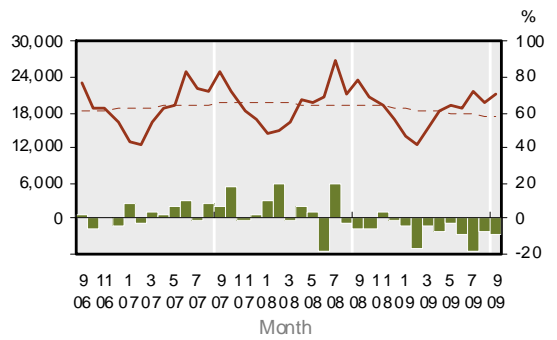
2.9 NZer Trips Abroad - VFR



2.10 NZer Trips Abroad - Business



2.11 NZer Trips Abroad - Other



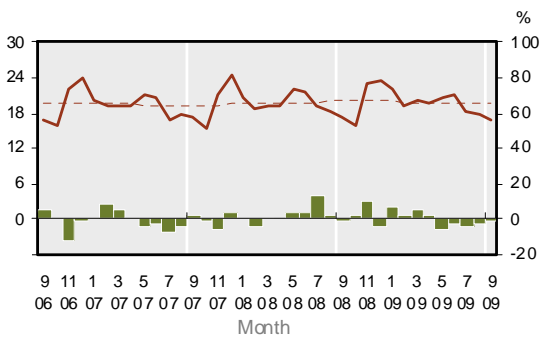
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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

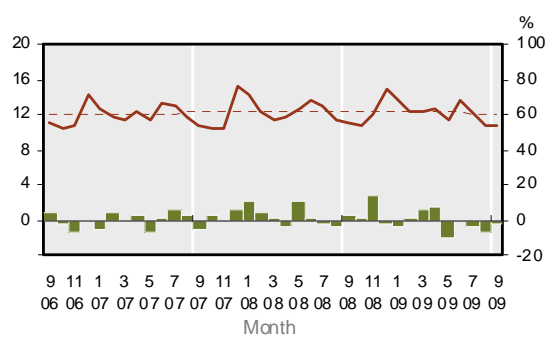
Length of Trips Abroad

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.

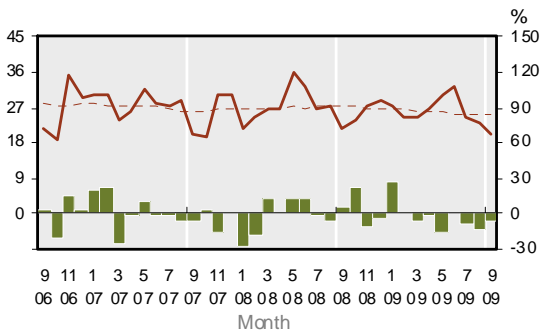
2.12 Average Days Abroad



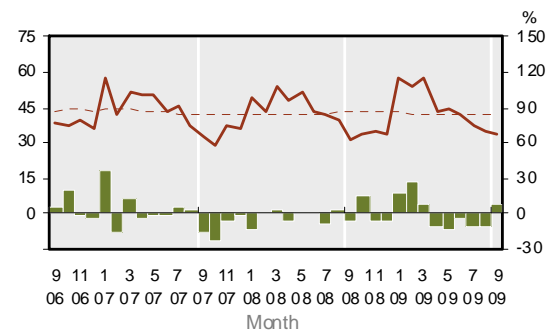
2.13 NZers Average Days Abroad - Australia



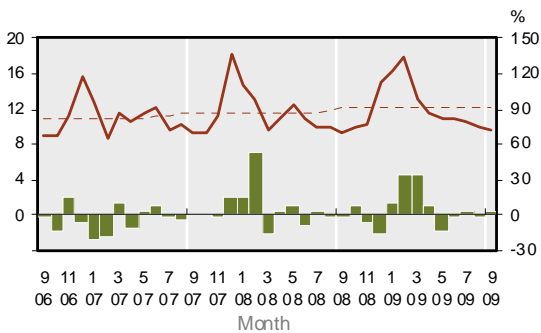
2.14 NZers Average Days Abroad - US



2.15 NZers Average Days Abroad - UK



2.16 NZers Average Days Abroad - Fiji

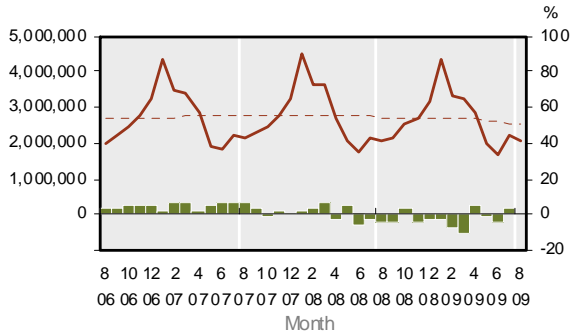


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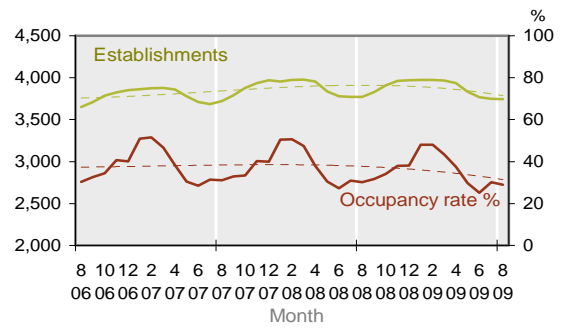
TRENDS AND PATTERNS

3. Commercial Accommodation

3.1 Total Guest Nights

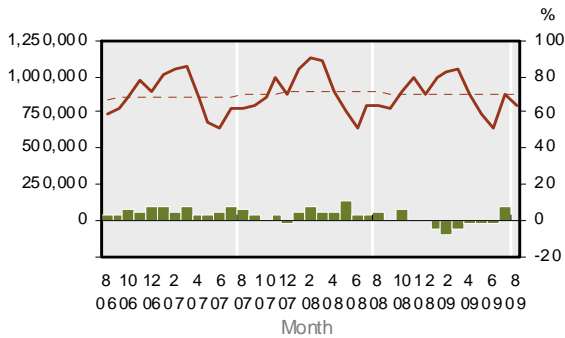


3.2 Total Establishments and Occupancy

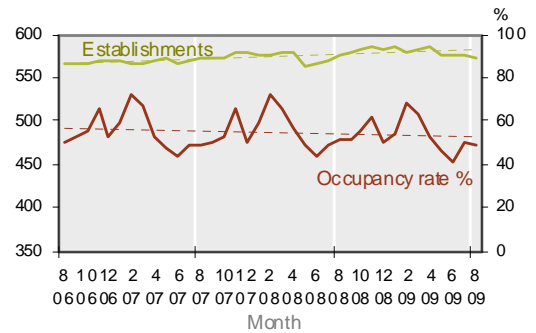


Guest Nights by Accommodation Type

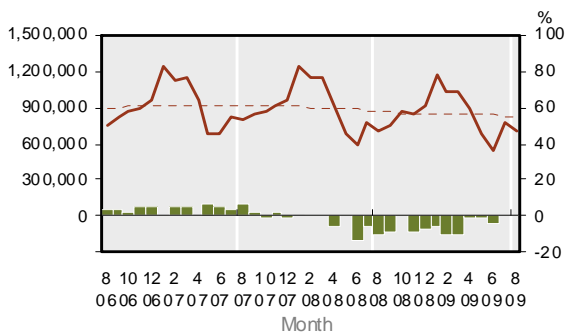
3.3 Hotel Guest Nights



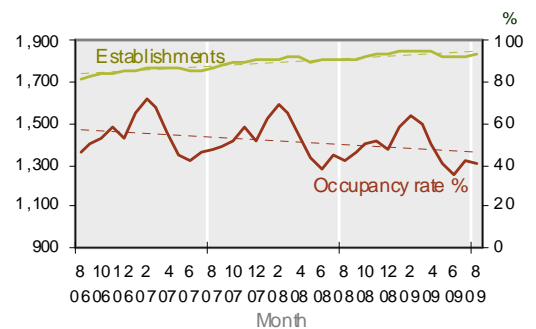
3.4 Hotels and Occupancy



3.5 Motel Guest Nights



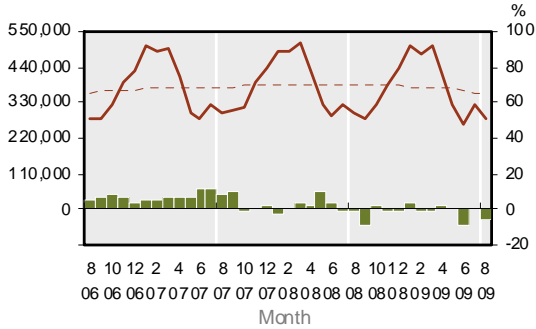
3.6 Motels and Occupancy



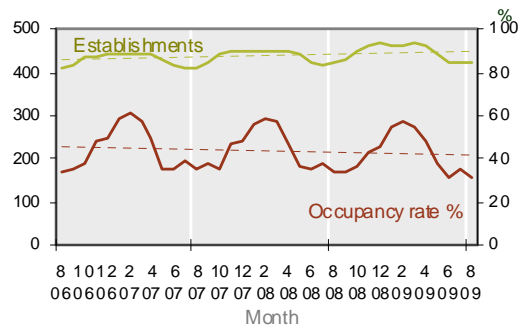
KEY:
 Solid line (brown) – show statistics described by the graph title (left scale).
 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

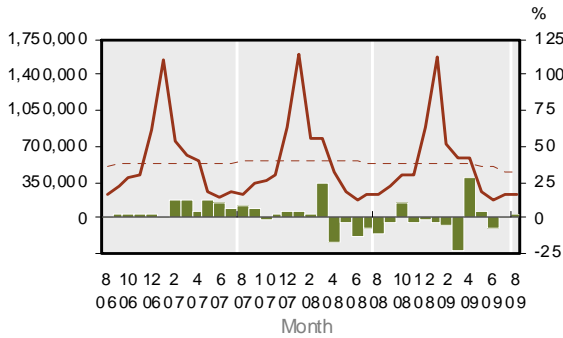
3.7 Backpacker Guest Nights



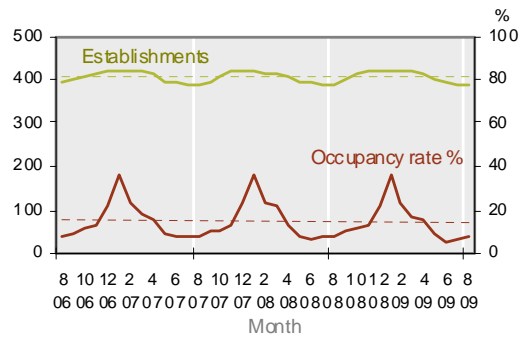
3.8 Backpackers and Occupancy



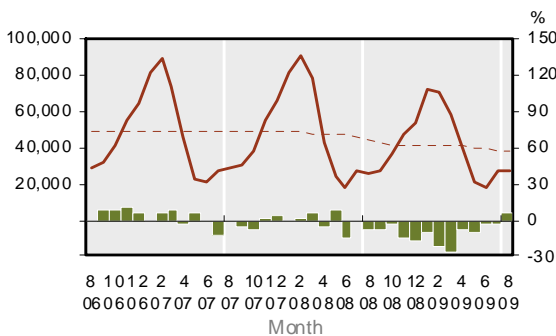
3.9 Caravan/Camping Guest Nights



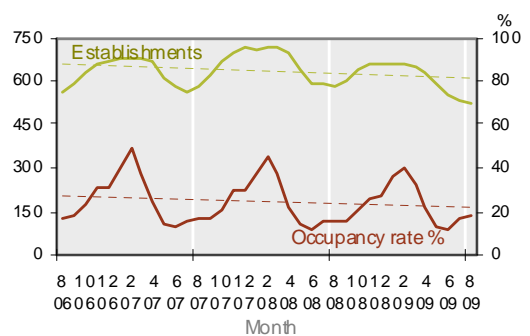
3.10 Caravan/Camping Est. and Occupancy



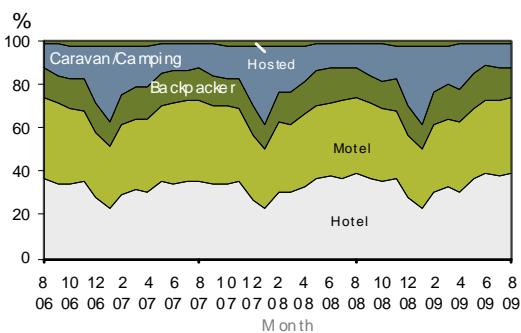
3.11 Hosted Guest Nights



3.12 Hosted and Occupancy



3.13 Share of Guest Nights by Establishment

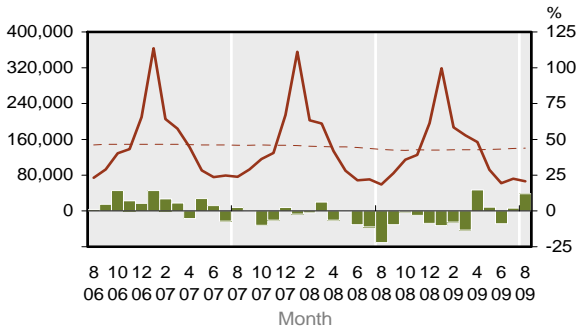


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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

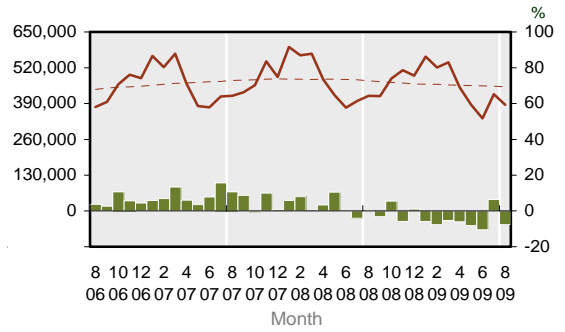
TRENDS AND PATTERNS

Guest Nights by Regional Tourism Organisation and District

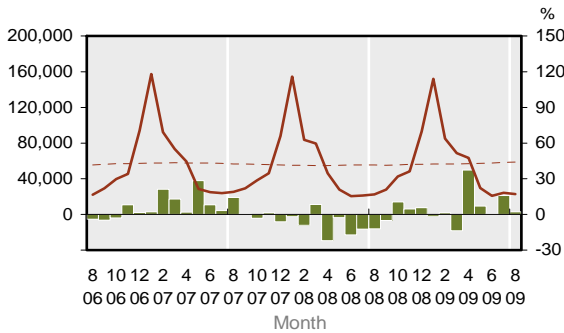
3.14 Northland RTO Guest Nights



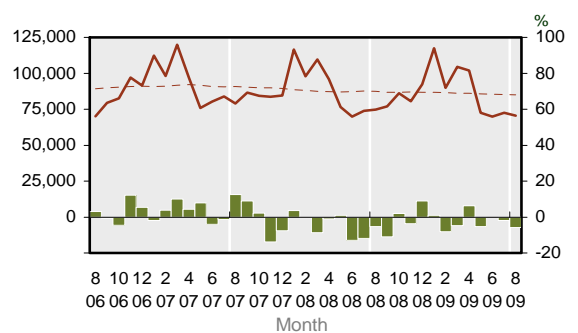
3.15 Auckland RTO Guest Nights



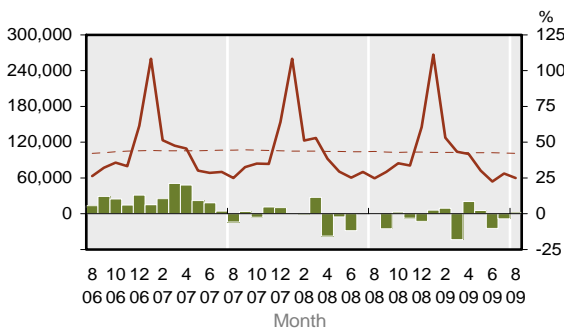
3.16 Coromandel RTO Guest Nights



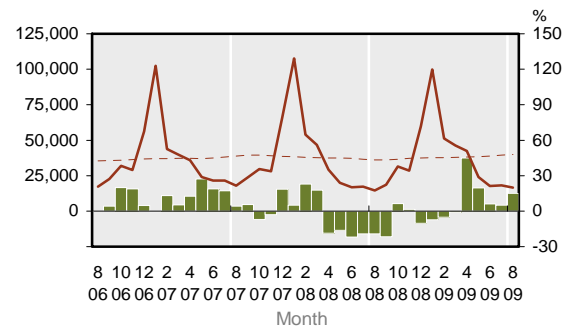
3.17 Waikato RTO Guest Nights



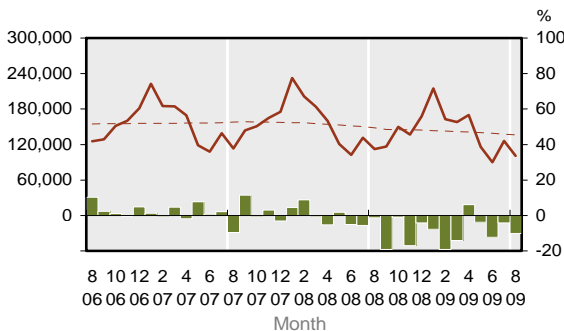
3.18 Bay of Plenty RTO Guest Nights



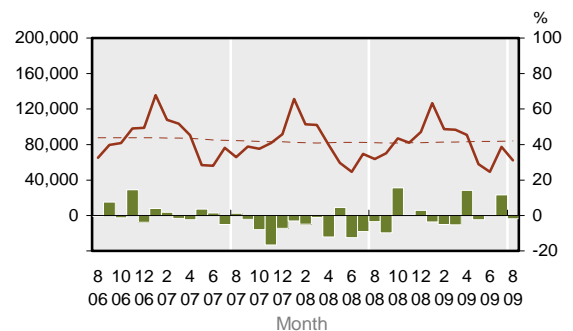
3.19 Eastland RTO Guest Nights



3.20 Rotorua RTO Guest Nights



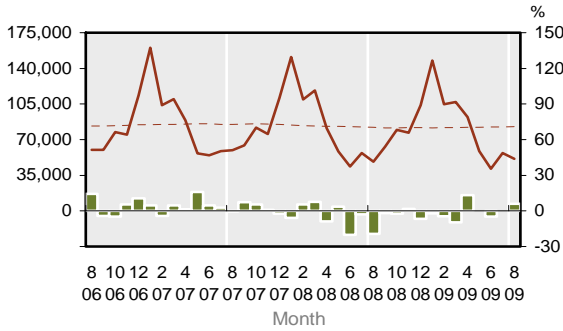
3.21 Lake Taupo RTO Guest Nights



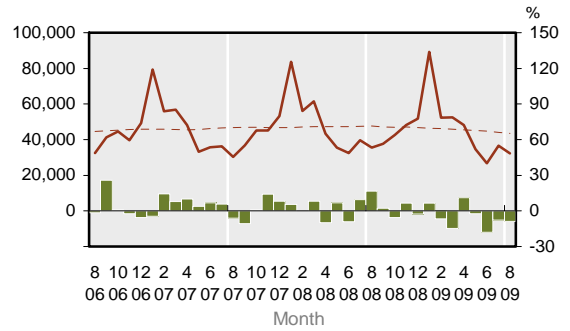
KEY:
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 Dotted line (brown) – trend line.
 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

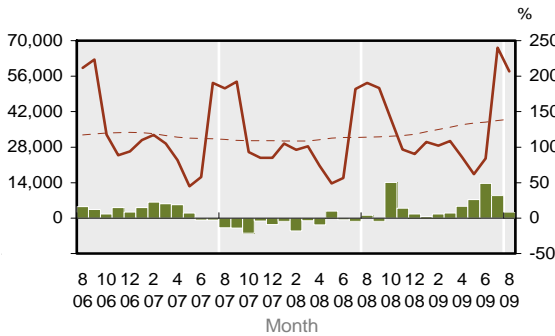
3.22 Hawke's Bay RTO Guest Nights



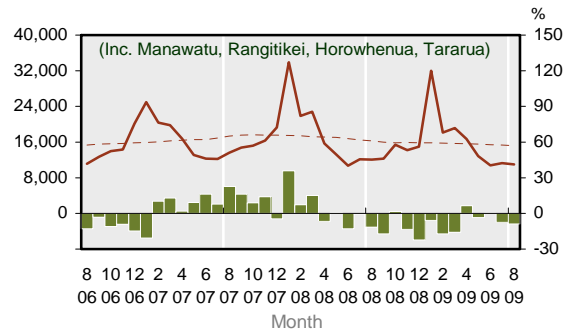
3.23 Taranaki RTO Guest Nights



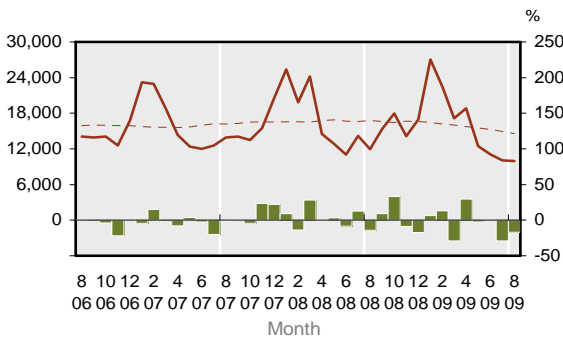
3.24 Ruapehu RTO Guest Nights



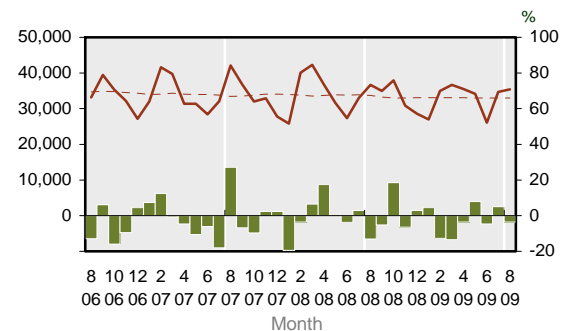
3.25 Combined Manawatu Guest Nights



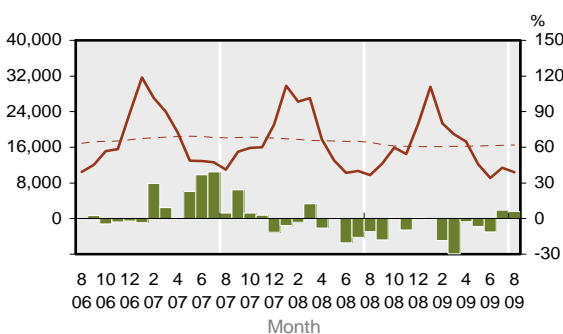
3.26 Wanganui District Guest Nights



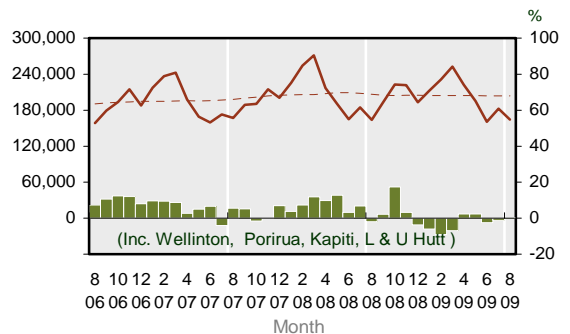
3.27 Palmerston North City Guest Nights



3.28 Wairarapa RTO Guest Nights



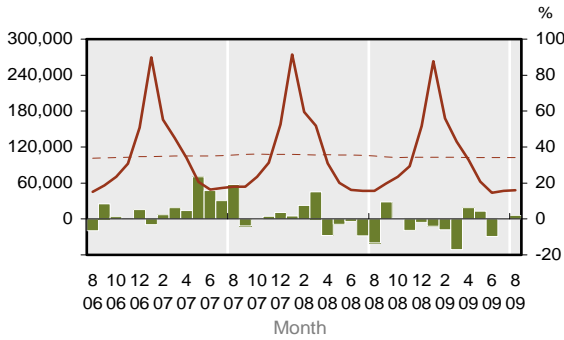
3.29 Wellington Region Guest Nights



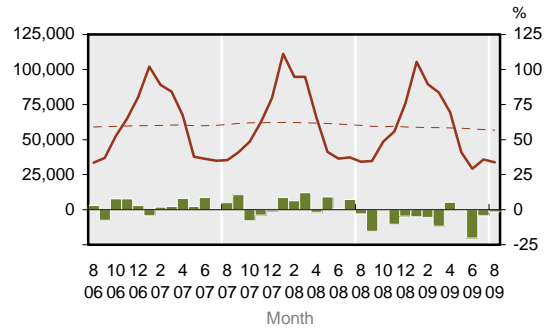
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 Bar chart (green) – growth rate of statistics over the same month previous year (right scale)

TRENDS AND PATTERNS

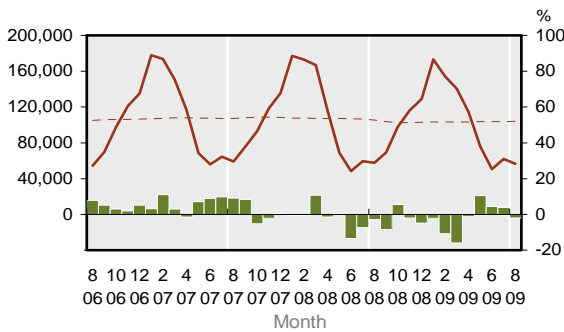
3.30 Nelson RTO Guest Nights



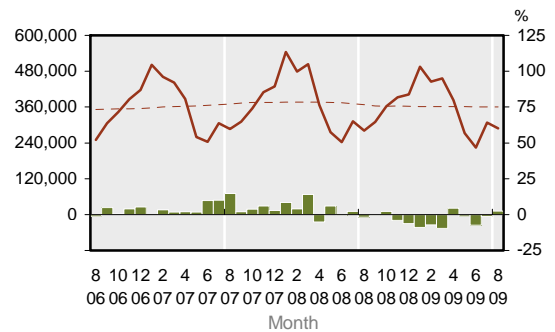
3.31 Marlborough RTO Guest Nights



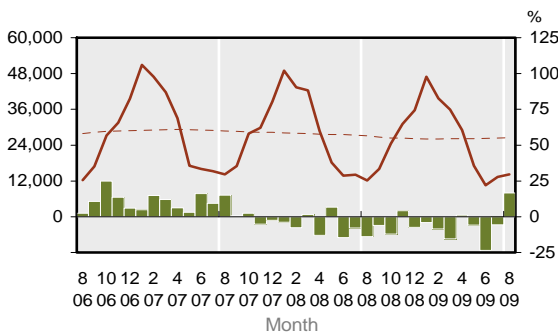
3.32 West Coast RTO Guest Nights



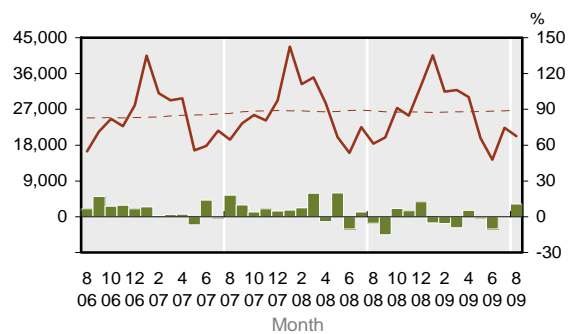
3.33 Canterbury Guest Nights



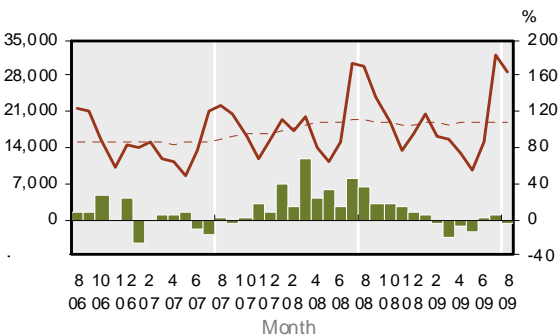
3.34 Kaikoura District Guest Nights



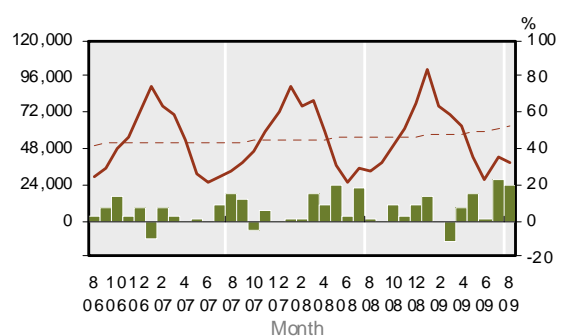
3.35 Hurunui RTO Guest Nights



3.36 Ashburton District Guest Nights



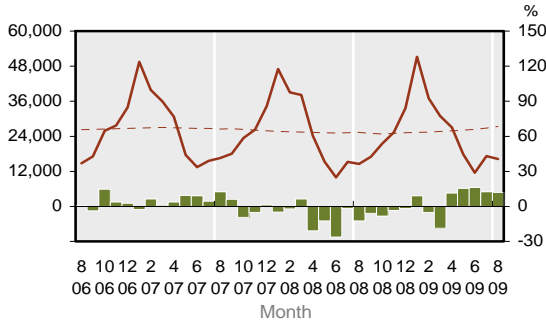
3.37 Mackenzie-Timaru Guest Nights



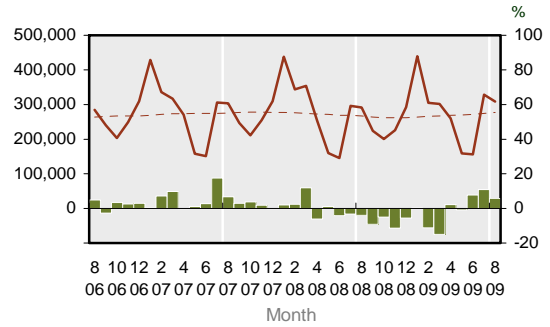
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TRENDS AND PATTERNS

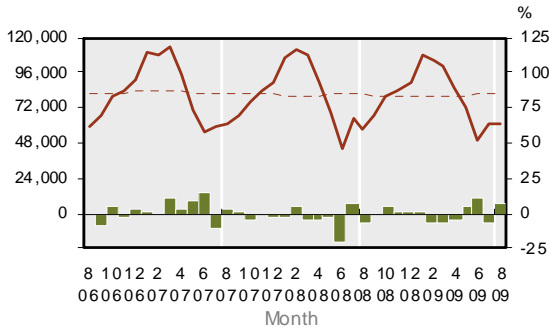
3.38 Waitaki-Waimate Guest Nights



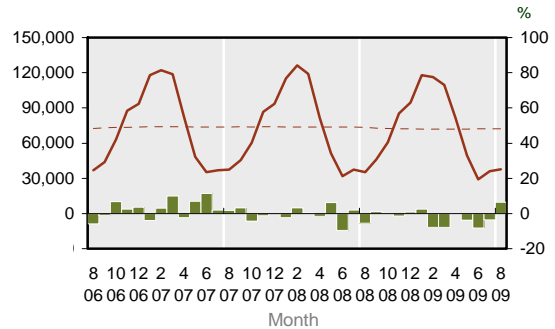
3.39 Queenstown Lakes - Central Otago Guest Nights



3.40 Dunedin - Clutha Guest Nights

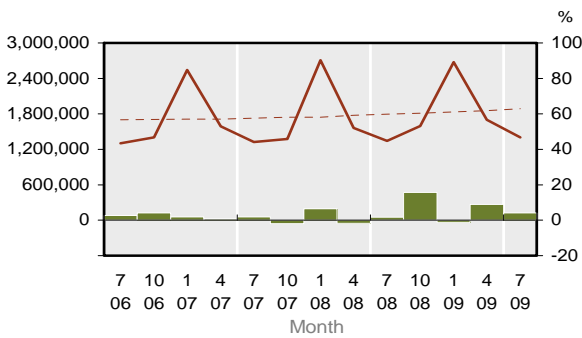


3.41 Southland Region Guest Nights

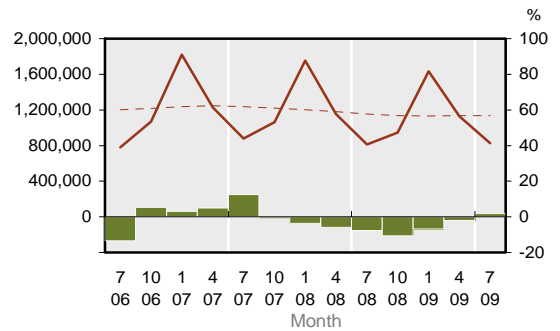


International and Domestic Guest Nights

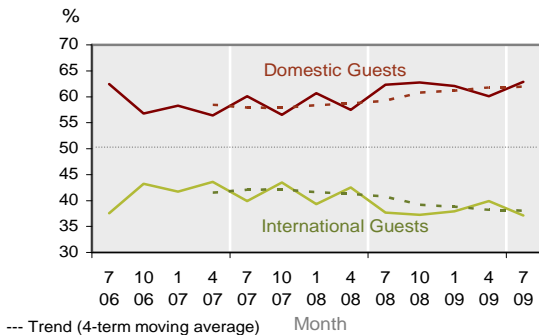
3.42 Domestic Guest Nights



3.43 International Guest Nights



3.44 Share of Total 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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Fern – Rebecca Davis, www.moxie.co.nz