AUCKLAND

Tamaki Herenga Waka

Exceptional Place

Exceptional People

Tourism Auckland City of Sails

www.aucklandnz.com

Tourism Auckland (visitAUCKLAND.co.nz)

Supporting the case for change …

… an opportunity to exceed growth projections … and to improve competitive success measures

… by way of … regional mandate, fit for purpose governance, competitively resourced, securely funded, tight focus, partnership approach, commercial focus

… based on soundly researched inputs

High level background for Auckland region tourism stakeholders

- The material that follows has been compiled as support material for stakeholders & participants in Auckland's visitor sector.
- **The time is right …**
  - Tourism Auckland presented a case for change to ACC in October 2002.
  - Tourism Auckland believes the time is right for changes that will lead to Tourism Auckland being structured, empowered and resourced to operate as a globally competitive and effective destination marketer for the Auckland region; with an appropriate regional mandate, supported by competitive and secure funding and fit-for-purpose governance and accountability.

The national context is provided by …

- The national tourism strategy … http://www.tourism.govt.nz/strategy/index.html
- Tourism New Zealand … http://www.newzealand.com/travel/home/

The Tourism Auckland business today …

- Market research
- Destination marketing
  - Offshore / Domestic / Local / on-line
  - C&I marketing
  - Export Education
  - Major Events
  - Media / communications
- Contracting / Consulting
- Product Development (esp Maori e.g. Tamaki Hikoi)
- Capability Building (including quality focus – Qualmark)
- Visitor Information Services (Visitor Information Centres – VICs)
- Advocacy / national industry connections
- Industry Updates (networking) and Government connections

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Auckland (& New Zealand) Rates Highly

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Lonely Planet

'This waterside city has a strong pulse and a nautical twinkle in its eye. Its location on a thin stretch of the North Island, sandwiched between the Pacific Ocean and the Tasman Sea, is complemented by the lush subtropical forests of nearby hills and the volcanic terrains of nearby islands.

With its spectacular harbour and bridge, New Zealand's largest city ranks with the best and its districts weave their way around a variety of bays ideal for swimming water sports and particularly yachting – hence the nickname *City of Sails*'.

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Cool Place

It's Official – New Zealand Is The Coolest Place on Earth

- Poll results from the UK have put New Zealand firmly in the number one spot for the world's coolest destination.
- "This win is a vindication of the recent work we've put in to the UK market, with the **Chelsea Flower Show** and our 'Come Now. If Not Sooner' advertising campaign ensuring New Zealand stays top of mind with potential travellers," says George Hickton, Chief Executive of Tourism New Zealand.
- CoolBrands was established in 2001, and is seen as the barometer of a brand's 'cool' factor.
- Researchers looked at thousands of brands before selecting 650 to put to a vote by both a panel of 23 'style' judges and the general public. 1725 people took part in the online survey, and fewer than 5% of brands initially considered made it to the final list.
- New Zealand outperformed major tourism destinations such as Morocco, Australia and the Maldives to take out the award, with The London News calling it, "The hottest place to be".

<u>Top Ten Destinations as voted by CoolBrands</u>

1. New Zealand 2. Morocco 3. Fiji 4. Prague 5.Australia 6. Maldives 7. Amsterdam 8. Brighton 9. Bahamas 10. Bermuda

William M Mercer

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MERCER
Human Resource Consulting

www.mercerHR.com

Worldwide Quality of Living Survey 2006
Base City: New York, USA (=100)

Rank 2006	*Rank 2005*	City	Country	Index 2006	*Index 2005*
1	*1*	ZURICH	Switzerland	108.2	*108.0*
2	*2*	GENEVA	Switzerland	108.1	*107.9*
3	*3*	VANCOUVER	Canada	107.7	*107.4*
4	*3*	VIENNA	Austria	107.5	*107.4*
5	*8*	AUCKLAND	New Zealand	107.3	*106.5*
6	*5*	DUSSELDORF	Germany	107.2	*107.0*
7	*6*	FRANKFURT	Germany	107.0	*106.8*
8	*7*	MUNICH	Germany	106.8	*106.7*
9	*9*	BERN	Switzerland	106.5	*106.4*
9	*9*	SYDNEY	Australia	106.5	*106.4*
11	*11*	COPENHAGEN	Denmark	106.2	*106.2*
12	*14*	WELLINGTON	New Zealand	105.8	*105.0*

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Considerations

- Resource to develop **a compelling brand proposition** supported by 'The most welcoming city in the world
- New domestic and east coast Australia **Campaign** element
- Tourism is a **key economic driver** for NZ & Auckland
- Tourism benefit is a **community benefit**
- The current destination marketing effort is compromised by **uncompetitive and insecure funding and a lack of regional mandate**
- NZ's most **commercial** RTO
- **Private sector contributions** ahead of Wellington & Christchurch
- Key Measures (NZ arrivals -1.1% for the YE Jul 06)
  - 5th best lifestyle city in the world
  - 70% of international arrivals
  - Auckland IVN +2.8% on PY, 31.0% share (NZ +1.1%), WLG, CHC both down.
  - Auckland – longest average LOS of all regions at 6.8 nights
  - Auckland highest share of IVN at 31.4%
  - Auckland share of conference delegate days 35.0% (Wgtn 18%)
  - Comparatively strongly performing hotel sector (1st equal Occupancy, 2nd yield – HCNZ)
  - Auckland domestic visits are +11.6% on PY, share of domestic visits is up from 15.9% to 17.5%

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Vision

- As New Zealand's key gateway destination Auckland is seen as absolutely vital to the core of New Zealand tourism
- Auckland is led by our compelling brand proposition
- The Brand proposition is supported and reinforced by:
  - A partnership with local government that delivers world class city environments within a uniquely Pacific culture
  - A world class waterfront (Coastal?) and lifestyle city that is friendly to walking and cycling
  - A well structured product offering that encompasses experiences, infrastructure, major events
  - A service ethic that makes Auckland the most welcoming city in the world

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A Compelling Brand Proposition

- Irrespective of any personal view points on the 'City of Sails' positioning, it is a brand position that has intrinsic equity.
- In prior years Tourism Auckland has questioned the relevance and mandate for the 'City of Sails' brand position. TLAs other than ACC have questioned it's regional relevance.
- Auckland Plus has commenced work on a new brand for the region that addresses both enterprise and destination needs. Tourism Auckland is party to that work.
- While it is acknowledged that the 'City of Sails' positioning for brand Auckland has considerable equity and that it fits well with the America's Cup, Tourism Auckland supports the concept of a brand review process

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Campaign Focus

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- Tourism Auckland is presently investing in new leadership resource to lead brand strategy and brand communication initiatives, that include:
  - Major Australian Campaign (elements partnered with TNZ)
    - TA has committed to a $250,000 autumn campaign in Australia) 75 x 15 sec TVCs on East Coast Australia for Autumn 2006
  - Domestic Campaign Scheduled for Autumn 2007
    - Auckland
    - VFR
- More independent and autonomous focus (complement TNZ but not limited to joint TNZ activity)

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Tourism is a key economic driver for New Zealand

(Tourism Satellite Account 2005)

- Total tourism expenditure was $17.2 billion for the year ended March 2004.
- International tourism contributed $7.4 billion (or 18.5 percent) to total New Zealand exports in 2004.
- Domestic tourism expenditure was $9.8 billion for the year ended March 2004.

NZ tourism performance

(Tourism Satellite Account 2004, Statistics NZ)

YE March	Direct tourism value added	Indirect tourism value added	Imports sold directly to tourists by retailers	Imports used in production of goods & services sold to tourists	GST on purchases by tourists	Total tourism expenditure	% change
	($ millions)						
1999	4,508	4,130	668	2,141	888	12,335	
2000	4,916	4,616	814	2,350	978	13,673	10.8%
2001	5,083	5,507	941	2,637	1,087	15,255	11.6%
2002	5,544	5,671	1,048	2,711	1,177	16,152	5.9%
2003	6,457	5,482	1,108	2,863	1,256	17,165	6.3%
2004	6,212	5,756	1,130	2,858	1,280	17,237	0.4%

A number of significant tourism-related events have affected New Zealand over the period covered by TSA04:

- New Zealand's defence of the America's Cup was held in Auckland in the March 2003 year.
- A number of movies filmed in New Zealand were successful internationally.
- An outbreak of the SARS (severe acute respiratory syndrome) virus in a number of Asian countries caused instability in the international travel environment in the March 2004 year.
- The rising New Zealand dollar, poor publicity about international student experiences, and the collapse of a number of English language schools contributed to a decline in international student numbers in the March 2004 year.

Tourism spend is community wide

(Tourism Satellite Account 2004)

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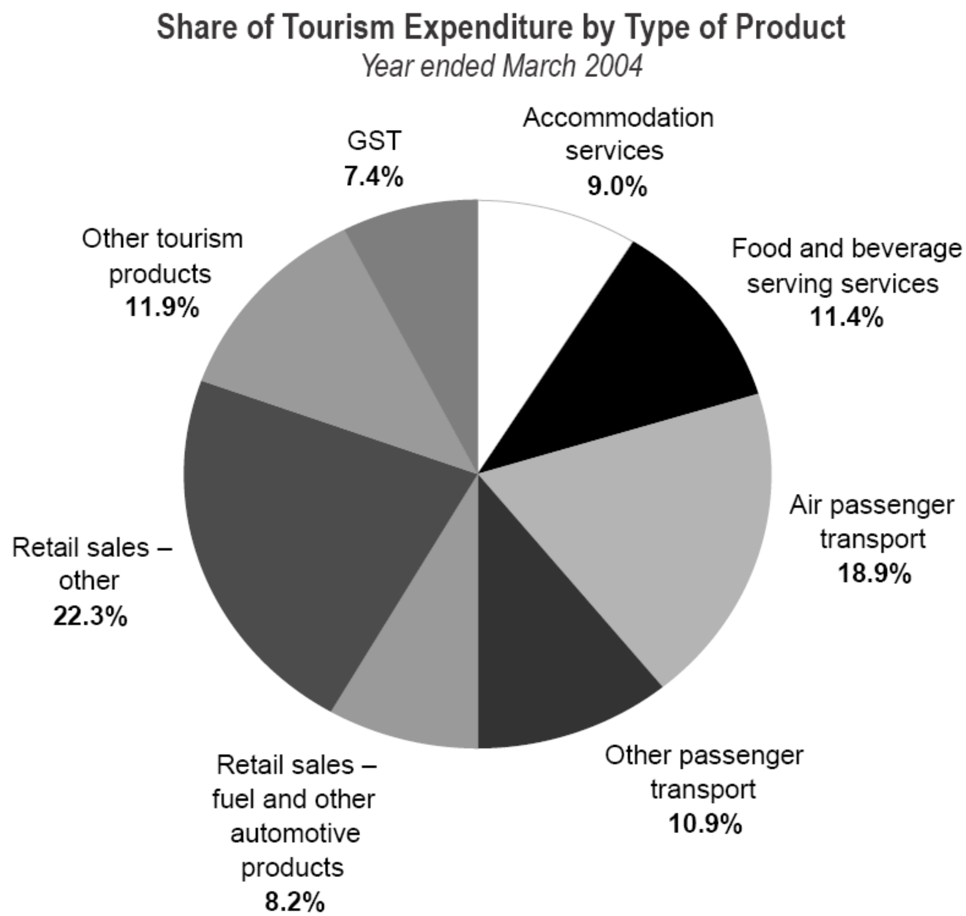
Figure 4



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Tourism is a key economic driver for the Auckland region

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Tourism Impacts on the Auckland region for the YE Dec 05

(Covec – September 2006)

Table 1 Summary of Local Authority Tourism Impacts 2005

	Local Contribution of Tourism		
	Expenditure ($NZm)	GDP ($NZm)	Employment (FTEs)
Rodney District	129	94	2,180
North Shore City	250	205	4,620
Waitakere City	149	120	2,900
Auckland City	1,733	1,536	30,480
Manukau City	922	768	11,640
Papakura District	49	39	970
Franklin District	44	43	1,030
Auckland Region	3,277	2,805	53,820

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Auckland under invests in destination marketing

A comparison

Current Status

RTO	*Population Base	*Households	Present funding Commitment $	Per Capita Funding	Per H'hold Funding
AKL RTO	1,187,598	437,700	$2,010,000	$1.69	$4.59
CHC RTO	492,978	186,882	$1,711,067	$3.47	$9.16
WLG RTO	163,827	62,733	$4,125,000	$25.18	$65.75
ROT RTO	68,772	22,767	$1,641,000	$23.86	$72.08
QTN RTO	20,730	5,613	$1,720,000	$82.97	$306.43
DUN RTO	118,035	43,974	$1,150,000	$9.74	$26.15
Average Funding /capita	1,933,905	715,695	12,357,067	$6.39	$17.27

* as taken from the 2006 Census

LEK Consulting – for the Prime Ministers Office – November 2001 (recommended that in order to be competitive, Tourism Auckland should be funded to the order of $9.6m)

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An equitable and enduring regional approach to funding the regions destination marketing is vital to Auckland improving market share measures

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Address Regional Funding Inequitability (& mandate?)

TLA/Region	*Population Base	*Household #	Present funding Commitment $	$ pp	$ per HH
Auckland CC	380,154	145,100	$1,645,000	$4.33	$11.34
Manukau CC	284,001	95,100	$600,000	$2.11	$6.31
North Shore CC	185,262	72,900	$100,000	$0.54	$1.37
Waitakere CC	168,465	61,800	$0	$0.00	$0.00
Rodney DC	77,385	33,200	$0	$0.00	$0.00
Franklin DC	51,951	14,800	$0	$0.00	$0.00
Papakura DC	40,380	13,560	$0	$0.00	$0.00
Average	1,187,598	436,460	$2,345,000	$1.97	$5.37

A commercially run organisation

Five of New Zealand’s ‘large’ i-SITES are profitable and Tourism Auckland owns & operates three of these.

Visitor Information Centre Performance

VISITOR INFORMATION CENTRE REPORT 2005-06

Income / Cost Drivers	Total (Exc. VIC Admin)	Total (Inc. VIC Admin)
Gross Voucher / Prepaid Sales (Nt.1)	**11,919,636**	**1,124,911**
INCOME		
Operational Revenue		
Net Commission Earned	**1,124,911**	**1,124,911**
Sub-Total Operational Revenue	**1,232,229**	**1,235,032**
Sub-Total Other Revenue	**15,315**	**200,368**
Trading Account Revenue	**152,059**	**152,726**
Total Net Income	**2,524,514**	**2,713,038**
EXPENDITURE		
Total Expenditure	**1,639,140**	**1,989,480**
NET SURPLUS / (DEFICIT)	**885,373**	**723,558**

A Commercial Operation

(New Zealand's most profitable i-SITES)

- Tourism Auckland operates three of New Zealand's five large i-SITE visitor information centres
- This result compares favourably with the Positively Wellington Tourism's i-SITE that breaks even.

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Noting that:

Tourism businesses are predominantly under- capitalised and marginally profitable

… and therefore …

the tourism sector is considered marginally bankable.

… Tourism Auckland has performed well in terms of attracting private contributions to marketing activities

The Nature of the Industry

Tourism - A marginal sector

Annual Enterprise Survey 2004
Prepared for Kane Boardman of Tourism Auckland
Ref. no.: JOH11670

Tourism Industries

ANZSIC Categories = (Division H, Division I except I61, L774, P92 and P93)

Table 1

	2004			
Profit Range x($)	%	Number of Firms (4)	%	Number of RMEs
x<$0	27.7%	7,880	23.6%	40,870
x=$0	3.7%	1,050	5.2%	9,070
x<$50,000	47.2%	13,440	15.7%	27,120
$50,000≤x<$100,000	10.7%	3,050	8.5%	14,790
$100,000≤x<$150,000	4.0%	1,150	6.3%	10,830
x≥$150,000	6.7%	1,900	40.6%	70,310
Total	100.0%	28,470		172,990

% of tourism businesses that return annual losses

31.4% of all tourism businesses either break-even or return annual losses

% of tourism businesses with profits <$50k

78.6% of all tourism businesses return annual profits of less than $50,000

Tourism is a marginal sector

Generally:

- Under-investment as a sector in new product development
- Low/no barriers to entry
- Under-capitalised businesses
- Under-investment in marketing by businesses
- Under-investment in skills development by business
- Low value and seasonally impacted jobs?
- High risk of under delivery on customer expectations



Private Sector Leveraging of TLA funding

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- Private sector contributions to Tourism Auckland activities for the YE 30 June 06 were $3.8m:
  - $1m (cash and in-kind)
  - $2.8m (VICs)
  - (Industry contributions)/(Grant Income) = 1.81

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Industry Contribution

COMPARISON OF INDUSTRY CONTRIBUTION RECEIVED TO GRANT RECEIVED

Description	$
Marketing Activity with Industry Partners	260,023
Study Auckland Membership Contributions	96,520
Publications	185,997
Business Tourism	130,150
Howick Historical Village	20,000
Contributions in kind	320,000
Total exc. Visitor Centres	**1,012,691**
Visitor Centres	**2,820,134**
Total Industry Contributions	**3,832,825**
Total Grants (inc. Study Auckland Grants)	**2,115,000**
$ Industry Contribution : $ Grant Received	**1.81**

Tourism Auckland Marketing Spend

- Total Marketing Spend $3.2m
- Total Council Grants $2.115m
  - (Marketing Spend)/(Council Grants)=1.51

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Industry Contribution

COMPARISON OFMARKETING SPEND TO GRANT RECEIVED

Description	$
Total Marketing Expenditure	3,193,336
Total Grants (inc. Study Auckland Grants)	2,115,000
$ Marketing Spend : $ Grant Received	1.51

Note:
The ratio does not include any general administration or premises expenses

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The Auckland Scorecard

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In a flat NZ market …

- Declining Growth in Arrivals (Arrivals down on PY for YE Jul 06)
- Declining visitor stay and spend
- Declining domestic travel expenditure
- Declining MICE arrivals and stay
- Dramatic fall off in export education arrivals

Auckland’s performance is strong

- Auckland has improved it’s share of domestic visits
- Auckland has improved it’s share of international visitor nights

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Auckland International Airport's share of arrivals is steady at 70%

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Port of Arrivals

(IVA – Statistics NZ)

Port of Entry of International Visitor Arrivals

Year ended September 2006

Country of Residence	Airport								Seaport	Total	% by market
	Auckland	Wellington	Christchurch	Hamilton	Palmerston North	Queenstown	Dunedin	Other Air			
Australia	491,265	86,903	230,471	19,019	13,106	20,447	16,523	21	6,301	**884,056**	37.3%
United Kingdom	215,715	9,826	59,819	462	226	616	607	0	2,053	**289,324**	12.2%
United States	180,707	4,010	30,878	133	65	876	65	24	7,527	**224,285**	9.5%
Japan	91,533	1,071	47,947	22	46	185	47	18	422	**141,291**	6.0%
Korea, Republic of	80,920	602	27,502	0	0	220	0	0	0	**109,244**	4.6%
China, People's Republic of	89,465	2,751	8,239	49	17	156	0	0	167	**100,844**	4.3%
Germany	41,585	1,858	14,370	116	0	110	65	0	703	**58,807**	2.5%
Canada	36,225	1,102	5,669	179	48	67	93	0	894	**44,277**	1.9%
Singapore	22,763	413	6,035	0	23	44	0	22	0	**29,300**	1.2%
Taiwan	24,501	109	3,675	0	0	119	0	0	181	**28,585**	1.2%
Hong Kong (SAR)	22,176	338	1,429	0	22	246	0	0	45	**24,256**	1.0%
Other/Not Stated	245,766	9,365	33,451	1,769	797	915	495	65	2,205	**294,828**	12.4%
Total	**1,653,891**	**121,818**	**496,202**	**21,868**	**14,435**	**24,246**	**18,042**	**175**	**21,106**	**2,371,783**	
% by Port	69.7%	5.1%	20.9%	0.9%	0.6%	1.0%	0.8%	0.0%	0.9%	100.0%	

International Visits

(IVS, YE Dec 05 – Statistics NZ)

- New Zealand International Visitor Nights +1.1%
- Auckland International Visitor Nights +2.8%, share 31.0 %

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Auckland has the highest average international stay

(IVS – YE Dec 05, Stats NZ)

Measure	Year ended Dec 05
NLD	3.4
AKL	6.8
ROT	2.6
WLG	5.9
CHC	3.9
ZQN	3.7
DUD	3.4
AVERAGE LOS BY RTO	4.1

Auckland has the highest share of international nights

(IVS – YE Dec 05, Stats NZ)

RTO	YE Dec 05
NLD	3.7%
AKL	31.4%
ROT	3.8%
WLG	8.7%
CHC	13.2%
ZQN	5.7%
DUN	2.6%

LOS – More detail

Table: Average Length of Stay by Visitor Purpose - Auckland

Main Reason for Visit - Auckland (Grouped)	YE Dec 01	YE Dec 02	YE Dec 03	YE Dec 04	YE Dec 05
All Purposes	8.77	9.8	13.4	11.11	9.2
Holiday	4.41	4.86	5.48	6.01	5.16
VFR	12.15	14.77	14.04	13.48	14.63
Business	5.5	6.11	8.64	5.62	7.17
Education	59.38	54.21	78.91	55.9	27.36
Other	29.58	42.97	49.95	31.64	25.23
Don't Know/Refused	-	0.92	2	3	-

Table: Average Length of Stay by Visitor Purpose - All of New Zealand

Main Reason For Visit - NZ (Grouped)	YE Mar 02	YE Mar 03	YE Mar 04	YE Mar 05	YE Mar 06
Total (Autobase)	19.66	21.52	25.25	22.53	19.71
Holiday	15.56	16.37	18.84	18.95	17.33
Visiting Friends And Relatives	20.32	22.85	23.29	21.63	20.08
Business	7.73	10.81	10.82	9.47	9.39
Education	94.64	91.79	106.67	86.29	62.66
Other	61.47	61.18	79.18	58.75	58.89
Don't Know/Refused	-	90.4	63	11	-

Auckland’s Top Six Inbound Markets

Table: No of visitors, Nights spent, and Average Length of Stay - Top 10 markets to Auckland

Current Year End

Measure	YE Mar 02	YE Mar 03	YE Mar 04	YE Mar 05	YE Mar 06
Australia					
People	320,199	326,937	411,673	443,621	462,727
Number Of Nights In Area	2,087,894	1,873,279	2,710,909	2,466,794	2,207,130
Average Number Of Nights In Area per Person	6.52	5.73	6.59	5.56	4.77
UK					
People	149,597	180,297	200,732	191,718	212,686
Number Of Nights In Area	1,521,914	1,996,661	2,251,674	1,559,124	1,993,597
Average Number Of Nights In Area per Person	10.17	11.07	11.22	8.13	9.37
United States Of America					
People	119,706	130,834	140,564	129,520	129,695
Number Of Nights In Area	573,363	635,299	790,380	757,105	712,559
Average Number Of Nights In Area per Person	4.79	4.86	5.62	5.85	5.49
Japan					
People	124,649	140,308	125,960	126,610	121,353
Number Of Nights In Area	737,087	1,133,032	2,085,076	1,378,051	849,523
Average Number Of Nights In Area per Person	5.91	8.08	16.55	10.88	7
Korea, Republic Of					
People	63,971	73,362	82,191	69,479	65,760
Number Of Nights In Area	1,449,063	851,761	2,283,716	1,224,269	807,448
Average Number Of Nights In Area per Person	22.65	11.61	27.79	17.62	12.28
China, People's Republic Of					
People	44,537	62,378	55,775	74,465	74,307
Number Of Nights In Area	1,093,373	2,324,006	1,942,930	1,649,648	882,775
Average Number Of Nights In Area per Person	24.55	37.26	34.84	22.15	11.88

Interesting to Note – from the IVS

- 64% of all international visitor nights are spent in the North Island!
- 33% of all international arrivals through Auckland visit Auckland only!
- Just under half (48%) of international visitors had visited New Zealand before and 84% of all visitors said that they would like to visit New Zealand again in the future.
- Nearly two-thirds of international visitors (65%) did not visit another country on their way to or from New Zealand. However, of those visitors who did make a stop, 23% visited Australia, 6% visited Singapore, 4% each visited Fiji and Thailand, and 3% each visited the USA, Hong Kong, and Other Asia.

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Travel Style

- Fully independent travel continues to be the most popular travel style for visitors to New Zealand with just under half (49%) of all visitors travelling this way. Semi-independent travellers also account for a large proportion of all visitors (33%).
- Tour group travel for the year ended March 2006 accounted for 6%, an increase of 80% compared to the previous year, due in part to tour groups visiting for the Lions Rugby Tour in mid-2005. While tour group travel increased, visitors travelling on packages fell by 6% compared with the year ended March 2005, accounting for 12% of all international visitors to New Zealand.

International Visitors (Holiday Nights)

(IVS - Dec 05) **Stats NZ**
Visitor counts less than 5,000 are subject to greater than +/-50% error. .
A new methodology applies from 2003

HOL

Regional Tourism Org Stayed Overnight	YE Dec 03	YE Dec 04	YE Dec 05	% Share 03	% Share 04	% Share 05	% Change 05
TOTAL	18,313,667	20,114,365	19,890,837				-1.1%
AKL	**4,078,604**	**4,604,252**	**4,330,651**	**22.3%**	**22.9%**	**21.8%**	**-5.9%**
ROT	965,393	901,076	1,122,671	5.3%	4.5%	5.6%	24.6%
WLG	878,470	1,031,582	1,154,394	4.8%	5.1%	5.8%	11.9%
CAN	2,607,769	3,015,414	2,773,430	14.2%	15.0%	13.9%	-8.0%
QTN	1,641,990	1,834,067	1,864,349	9.0%	9.1%	9.4%	1.7%

New Zealand -1.1%

1. Auckland -5.9%, Share 21.8%
2. Canterbury -8.0%, Share 13.9%

International Visitors (VFR Nights)

(IVS - Dec 05) **Stats NZ**

Visitor counts less than 5,000 are subject to greater than +/-50% error. .
A new methodology applies from 2003

VFR

Regional Tourism Org Stayed Overnight	YE Dec 03	YE Dec 04	YE Dec 05	% Share 03	% Share 04	% Share 05	% Change 05
TOTAL	11,331,757	12,478,402	12,368,668				-0.9%
AKL	**4,096,000**	**4,806,884**	**5,027,416**	**36.1%**	**38.5%**	**40.6%**	**4.6%**
ROT	206,333	214,198	239,860	1.1%	1.1%	1.2%	12.0%
WLG	1,343,805	1,165,544	1,107,001	7.3%	5.8%	5.6%	-5.0%
CAN	1,319,171	1,350,640	1,295,402	7.2%	6.7%	6.5%	-4.1%
QTN	160,815	105,888	243,311	0.9%	0.5%	1.2%	129.8%

New Zealand -0.9%

- Auckland +4.6%, Share 40.6%
- Canterbury -4.1%, Share 6.5%

International Visitors (BUS Nights)

(IVS - Dec 05) **Stats NZ**

Visitor counts less than 5,000 are subject to greater than +/-50% error. .

A new methodology applies from 2003

BUS

Regional Tourism Org Stayed Overnight	YE Dec 03	YE Dec 04	YE Dec 05	% Share 03	% Share 04	% Share 05	% Change 05
TOTAL	4,019,620	2,902,689	3,642,591				25.5%
AKL	**1,937,207**	**1,414,468**	**1,774,113**	**48.2%**	**48.7%**	**48.7%**	**25.4%**
ROT	59,289	68,462	44,755	1.5%	2.4%	1.2%	-34.6%
WLG	583,942	594,467	450,210	14.5%	20.5%	12.4%	-24.3%
CAN	484,775	211,763	383,233	12.1%	7.3%	10.5%	81.0%
QTN	104,024	37,742	64,405	2.6%	1.3%	1.8%	70.6%

New Zealand +25.5%

1. Auckland +25.4%, Share 48.7 %
2. Canterbury +10.5%, Share 10.5%

International Visitors
(TOTAL Nights – Hol+VFR+Bus)

(IVS - Dec 05) **Stats NZ**
Visitor counts less than 5,000 are subject to greater than +/-50% error. .
A new methodology applies from 2003

TOTAL

Regional Tourism Org Stayed Overnight	YE Dec 03	YE Dec 04	YE Dec 05	% Share 03	% Share 04	% Share 05	% Change 05
TOTAL	33,665,044	35,495,456	35,902,096				1.1%
AKL	**10,111,811**	**10,825,604**	**11,132,180**	**30.0%**	**30.5%**	**31.0%**	**2.8%**
ROT	1,231,015	1,183,736	1,407,286	3.7%	3.3%	3.9%	18.9%
WLG	2,806,217	2,791,593	2,711,605	8.3%	7.9%	7.6%	-2.9%
CAN	4,411,715	4,577,817	4,452,065	13.1%	12.9%	12.4%	-2.7%
QTN	1,906,829	1,977,697	2,172,065	5.7%	5.6%	6.0%	9.8%

New Zealand +1.1%

- Auckland +2.8%, share 31.0 %
- Canterbury -2.7%, share 12.4 %
- Wellington -2.9%, share 7.6%

International Arrivals

(IVA – YE September 2006, Stats NZ)

		Year ended September 2006				
		2006	% Change	2005	% Change	2004
1	**Aus**	**884,056**	**0.9**	**875,864**	**6.3**	**824,279**
2	UK	289,324	-6.2	308,446	10.6	278,986
3	USA	224,285	3.1	217,518	0.2	216,988
4	Jpn	141,291	-11.5	159,617	-3.3	165,019
5	Kor	109,244	-3.9	113,645	-1.7	115,578
6	Chn	100,844	19.0	84,737	5.6	80,268
7	Pac	99,574	6.7	93,342	6.6	87,595
8	Ger	58,807	1.8	57,776	4.8	55,124
9	Can	44,277	4.8	42,241	3.5	40,795
10	Sin	29,300	-6.3	31,272	-6.9	33,598
11	Tai	28,585	4.7	27,309	-0.3	27,387
12	Neth	26,798	2.9	26,039	0.5	25,913
13	HK	24,256	-8.2	26,433	-5.1	27,849
14	Mal	21,258	-14.6	24,896	1.1	24,618
15	Ind	20,210	18.1	17,111	12.2	15,248
16	Ire	19,352	-7.3	20,886	23.0	16,981
17	Other	47,568	-11.1	53,522	-29.1	75,443
	TOTAL	**2,383,940**	**-0.7**	**2,400,017**	**4.0**	**2,307,470**

International Arrivals
(IVA - YE September 2006)

		Year ended September 2006								
		Holiday 2006	% Change	% of Total Holiday	VFR 2006	% Change	% of Total VFR	Business 2006	% Change	% of Total Business
1	**Aus**	**342,265**	**1.2**	**29.1**	**313,723**	**0.4**	**46.0**	**153,544**	**1.9**	**57.9**
2	UK	146,284	-13.1	12.5	118,744	2.4	17.4	12,058	8.1	4.5
3	USA	134,842	0.7	11.5	44,577	7.7	6.5	20,720	-2.8	7.8
4	Jpn	110,612	-11.7	9.4	12,073	-7.6	1.8	6,509	-16.2	2.5
5	Kor	75,547	-7.4	6.4	16,634	-8.3	2.4	3,067	1.2	1.2
6	Chn	52,929	23.5	4.5	11,853	1.3	1.7	23,354	25.8	8.8
7	Pac	32,883	4.5	2.8	37,738	4.1	5.5	6,961	-4.2	2.6
8	Ger	42,098	-1.0	3.6	8,404	6.7	1.2	2,657	7.1	1.0
9	Can	24,716	8.0	2.1	13,317	0.8	2.0	2,406	-13.2	0.9
10	Sin	15,995	-14.7	1.4	4,760	8.8	0.7	5,631	9.3	2.1
11	Tai	16,456	6.6	1.4	5,397	-2.1	0.8	1,071	7.1	0.4
12	Neth	17,762	4.4	1.5	6,597	-0.7	1.0	991	-7.1	0.4
13	HK	13,174	-8.5	1.1	6,425	-14.8	0.9	2,532	12.6	1.0
14	Mal	11,781	-18.2	1.0	5,408	-4.0	0.8	1,657	4.1	0.6
15	Ind	9,934	28.7	0.8	5,674	0.1	0.8	1,570	36.4	0.6
16	Ire	12,643	-13.0	1.1	4,921	3.7	0.7	468	-19.0	0.2
17	Other	10,831	-12.3	0.9	15,695	-1.8	2.3	4,255	-9.5	1.6
	TOTAL	**1,174,499**	**-2.7**	**100.0**	**681,393**	**1.4**	**100.0**	**265,328**	**2.6**	**100.0**

International Arrivals

(IVA – September 06)

(Aus continuing flat/weak, UK & USA flat, JPN continuing very weak, KOR variable, CHN strong)

	Month of September					
		2006	% Change	2005	% Change	2004
1	**Aus**	**82,404**	**-1.8**	**83,952**	**7.5**	**78,120**
2	UK	11,718	1.6	11,528	-1.3	11,680
3	USA	10,458	1.8	10,274	-5.0	10,820
4	Kor	8,253	28.9	6,402	-6.7	6,860
5	Chn	8,106	33.0	6,094	-4.8	6,400
6	Jpn	7,602	-21.6	9,702	-12.9	11,140
7	Pac	7,539	8.4	6,952	15.5	6,020
8	Ger	2,919	13.4	2,574	2.1	2,520
9	Can	1,995	9.3	1,826	6.2	1,720
10	Tai	1,764	-22.9	2,288	19.2	1,920
11	Ind	1,743	44.0	1,210	8.0	1,120
12	Sin	1,680	9.1	1,540	-13.5	1,780
13	HK	1,365	-8.8	1,496	-5.3	1,580
14	Mal	1,281	-20.2	1,606	0.4	1,600
15	Thai	1,134	22.7	924	-34.0	1,400
16	Ire	1,092	-0.7	1,100	0.0	1,100
17	Neth	903	2.6	880	-4.3	920
	Other/Not Stated	3,822	37.9	2,772	-26.7	3,780
	TOTAL	**166,531**	**1.7**	**163,785**	**1.6**	**161,182**

International Arrivals

(IVA – September 06)

(Aus continuing flat/weak, UK & USA flat, JPN continuing very weak, KOR variable, CHN strong)

		Month of September 2006								
		Holiday 2006	% Change	% of Total Holiday	VFR 2006	% Change	% of Total VFR	Business 2006	% Change	% of Total Business
1	**Aus**	**36,771**	**-4.1**	**46.0**	**23,688**	**-4.7**	**55.0**	**12,789**	**-5.0**	**60.4**
2	UK	5,880	-0.3	7.4	4,158	5.6	9.6	819	-4.5	3.9
3	USA	5,775	2.9	7.2	2,079	5.0	4.8	1,281	-15.6	6.0
4	Kor	5,565	28.4	7.0	1,449	26.7	3.4	315	59.1	1.5
5	Chn	4,326	66.6	5.4	1,050	-2.6	2.4	1,869	7.5	8.8
6	Jpn	5,229	-28.4	6.5	1,050	19.3	2.4	525	-20.5	2.5
7	Pac	1,974	0.8	2.5	2,709	2.6	6.3	672	1.8	3.2
8	Ger	1,869	6.2	2.3	231	-25.0	0.5	189	-4.5	0.9
9	Can	1,134	12.1	1.4	525	25.6	1.2	147	-16.5	0.7
10	Tai	777	-36.9	1.0	420	-4.5	1.0	21	-84.1	0.1
11	Ind	735	51.9	0.9	315	-28.4	0.7	168	52.7	0.8
12	Sin	903	14.0	1.1	252	-11.9	0.6	399	13.4	1.9
13	HK	588	-13.8	0.7	357	-37.6	0.8	294	90.9	1.4
14	Mal	588	-23.6	0.7	399	-4.5	0.9	210	-4.5	1.0
15	Thai	567	12.1	0.7	294	167.3	0.7	21	-76.1	0.1
16	Ire	756	10.9	0.9	231	-12.5	0.5	0	-100.0	0.0
17	Neth	546	24.1	0.7	168	-23.6	0.4	63	43.2	0.3
	Other/Not Stated	735	51.9	0.9	1,386	21.2	3.2	294	67.0	1.4
	TOTAL	**79,905**	**0.9**	**100.0**	**43,092**	**-1.0**	**100.0**	**21,189**	**-2.1**	**100.0**

NZ Residents Outbound

(The larger this number and the higher the growth, the greater the impact on Domestic Travel Spend)

NZ Residents Outbound Travel

Source: Statistics New Zealand

	2003	2004	2005	2006	2005 (Aust)	2006 (Aust)
Jan	112,437	80,386	97,765	107,655	50820	56940
Feb	63,922	84,618	93,535	91,116	53924	51454
Mar	87,461	113,646	135,209	123,590	75371	68607
Apr	5,060	144,074	159,567	162,790	84140	84006
May	108,337	136,819	146,651	147,929	70679	71211
Jun	121,855	168,959	172,459	187,785	79649	82302
Jul	138,273	183,307	205,182	186,755	97692	90020
Aug	125,333	162,696	171,663	163,769	89075	78725
Sep	149,515	186,305	195,819		96096	
Oct	125,811	150,237	161,320		90612	
Nov	132,644	148,484	144,197		68094	
Dec	147,882	173,679	188,434		84999	
TOTAL	1,320,533	1,735,214	1,873,806	1,173,395	941,151	583,265
% Increase Full Yr		31.4%	8.0%	1.1%		

Aus	YE Aug 06	923,066	YE Aug 06	1,861,159	1.1%
			YE Aug 05	1,840,736	

Business Events

- MICE arrivals are 2.36% of all arrivals
- Both delegate arrivals and stay are declining
- 90% of all delegated days in NZ are domestic/local
- Of the 10% of international delegate days, Australia makes up 48.9% of that number

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Business Events - Arrivals

		Arrivals 2006	Av Stay 2006	Days 2006	% Change Arrivals 06	% Change Days Stay 06	Market Share by Days
1	**Aus**	**34247**	**6.41**	**219421**	**-1.3**	**-1.9%**	**49.9%**
2	USA	4367	10.18	44458	30.0	**38.1%**	**10.1%**
3	Pac	3095	9.97	30872	-8.0	**-49.1%**	**7.0%**
4	Chn	1948	5.44	10589	0.8	**-7.1%**	**2.4%**
5	UK	1731	16.73	28960	-14.6	**14.8%**	**6.6%**
6	Jpn	1387	5.88	8159	-45.1	**-42.5%**	**1.9%**
7	Can	964	9.85	9500	35.8	**44.8%**	**2.2%**
8	Ind	818	12.22	9992	1.9	**36.3%**	**2.3%**
9	Tai	817	6.82	5573	19.8	**16.2%**	**1.3%**
10	Sin	742	7.25	5380	-18.4	**4.3%**	**1.2%**
	TOTAL	**57074**	**7.70**	**439451**	**-5.1**	**-5.1%**	

NZ Bureaux Research

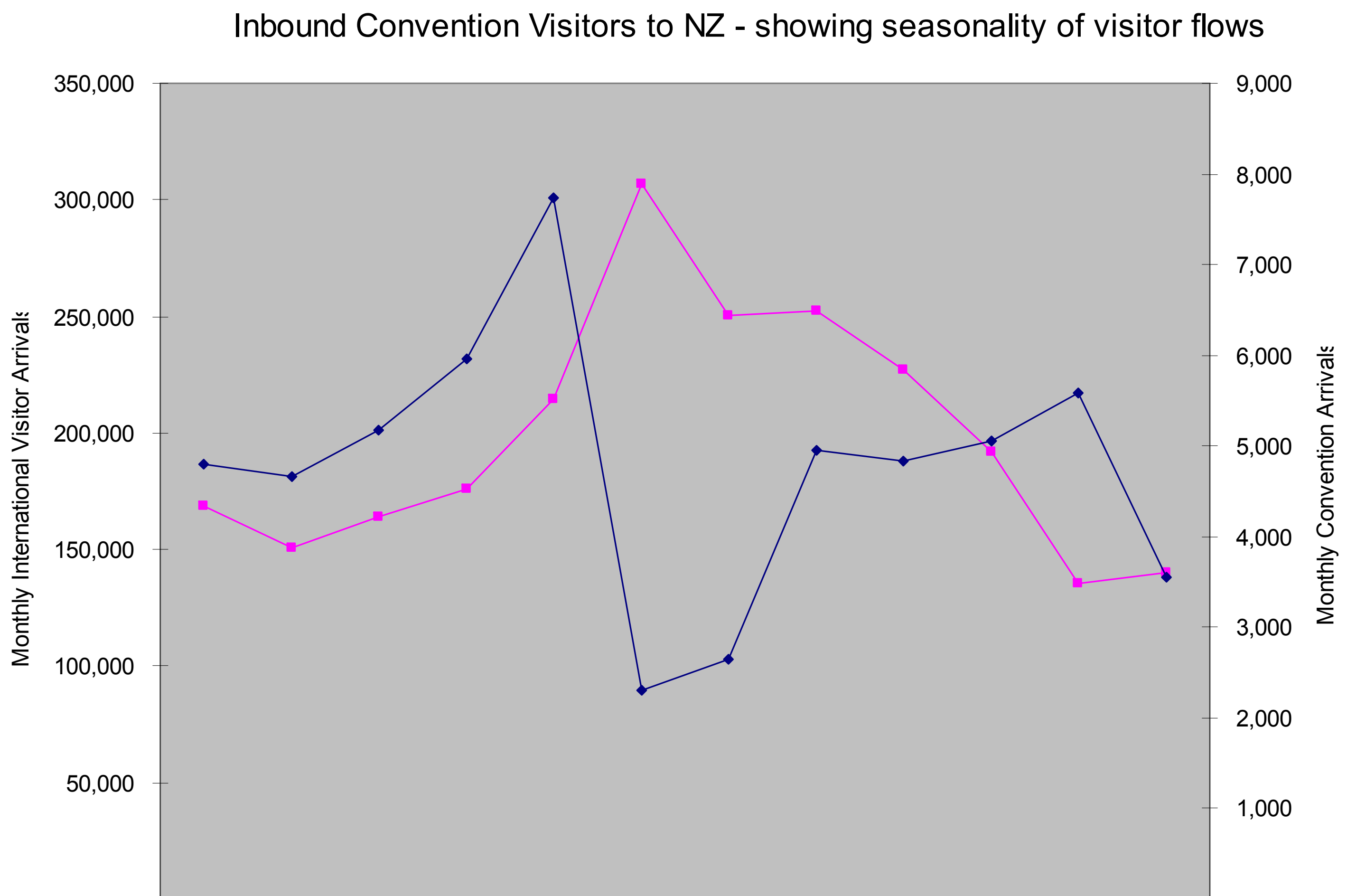
(Angus & Associates – July 2006)
(figures are % share)

	No of Conferences		No of Conference days		No of Conference delegates		No of Conference delegate days	
	YE Jun 05	YE Jun 06	YE Jun 05	YE Jun 06	YE Jun 05	YE Jun 06	YE Jun 05	YE Jun 06
AKL	34	37	34	36	38	36	39	35
CHC	17	17	13	12	10	11	11	12
WLG	13	12	17	16	19	20	17	18
ROT	10	8	9	8	8	6	9	7
ZQN	6	6	7	8	5	5	5	7
TOTALS	5098	5945	13814	16215	335751	421188	1024734	1254569
% Growth		16.6%		17.4%		25.4%		22.4%

NZ	Convention Nights made up 2.4% of NZ International Visitor Nights for YE Jun 2005
AKL	Convention Nights made up 2.1% of Auckland International Visitor Nights for YE Jun 2005

The seasonality of C & I

(A shoulder season opportunity?)



	Jul-05	Aug-05	Sep-05	Oct-05	Nov-05	Dec-05	Jan-06	Feb-06	Mar-06	Apr-06	May-06	Jun-06
IVA	168,422	150,656	163,785	176,216	214,694	307,061	250,554	252,431	226,966	191,648	135,279	139,891
C&I	4,800	4,662	5,170	5,957	7,728	2,300	2,652	4,950	4,830	5,060	5,576	3,546

Airline Dynamics

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- The emergence of ‘value airlines’ and the aggressive pursuit of new business by competitor airport companies has resulted in some significant capacity shifts away from Auckland
- This is a key area of the sector about which little is known.

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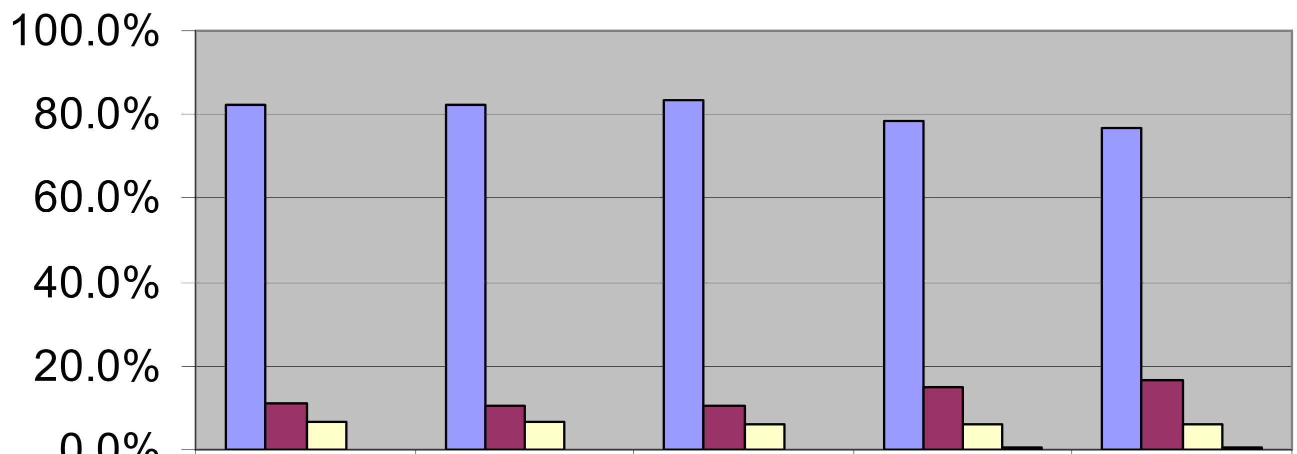
Arrival International Airline Seats (One way)



	YE Dec 01	YE Dec 02	YE Dec 03	YE Dec 04	YE Dec 05
AKL Share	82.1%	82.5%	83.4%	78.6%	76.7%
CHC Share	11.0%	10.5%	10.5%	14.9%	16.6%
WLG Share	6.7%	6.8%	5.9%	6.2%	6.3%
ZQN Share ZQN Share	0.2%	0.2%	0.2%	0.3%	0.5%

NOTE: Only the four ports were considered in this discussion. True % results may differ slightly from these, and rounding errors apply.

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Some shifts in visitor patterns

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Database - International Visitors Survey
Base: Auckland RTO, Australia
Total Responses

No. Nights By Accommodation Type(Grouped)	YE Dec 03	YE Dec 04	YE Dec 05	
Total (Responses)	2,391,208	2,644,237	2,246,072	-15.1%
Hotels	600,169	591,468	494,031	-16.5%
Motels	172,952	187,264	237,837	27.0%
Guest And Hosted	9,418	5,720	24,105	321.4%
Resorts, Luxury Lodges, Retreats	3,246	4,666	3,146	-32.6%
Backpackers/Hostels	70,702	67,589	111,604	65.1%
Holiday Parks/Campgrounds	17,115	11,319	55,225	387.9%
Student Halls Of Residence	52,989	0	0	
Other Collective Establishments	0	1,270	1,994	57.0%
Owned Dwellings - Private	1,099,869	1,660,055	1,216,780	-26.7%
Owned Dwellings - Rented	350,312	113,372	68,013	-40.0%
DoC Site	0	0	0	
Other Tourism Accommodation	14,434	1,512	33,336	2104.8%
IVS Commercial Nights in AKL	873,602	868,026	925,948	6.7%
Change in Commercial Nights	33%	-1%	7%	

Notable in this table is the shift away from hotel accommodation to the lower yielding hostels, holiday parks and camping grounds.

Database - International Visitors Survey

Base: Auckland RTO

No. Nights By Accommodation Type(Grouped)	YE Dec 04	YE Dec 05	% by Accomm	% Change v PY
Total	16,854,797	14,028,676		
Hotels	1,879,951	1,824,007	13.0%	-3.0%
Motels	645,700	663,508	4.7%	2.8%
Guest And Hosted	1,236,004	865,550	6.2%	-30.0%
Resorts, Luxury Lodges, Retreats	11,819	56,171	0.4%	375.3%
Backpackers/Hostels	1,053,564	861,802	6.1%	-18.2%
Holiday Parks/Campgrounds	135,754	178,113	1.3%	31.2%
Student Halls Of Residence	851,052	260,012	1.9%	-69.4%
Other Collective Establishments	18,613	15,453	0.1%	-17.0%
Owned Dwellings - Private	8,259,570	7,566,340	53.9%	-8.4%
Owned Dwellings - Rented	2,656,352	1,585,631	11.3%	-40.3%
DoC Site	3,085	0	0.0%	
Other Tourism Accommodation	103,332	152,090	1.1%	47.2%
IVS Commercial Nights in AKL	4,962,792	4,449,151		

- 13% of all Auckland international visitor nights are spent in hotels
- 53.9% of all Auckland international nights are spent in private dwellings

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Export Education decline has impacted dramatically on international visitor nights

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Table: Main Reason For Visit - NZ (Grouped) by Current Year End: Number Of Nights In Area

Database - International Visitors Survey
Base: Auckland RTO Comparing with Total (Current Year End)
Total Responses Suppressing Total Column(s)

Main Reason For Visit - NZ (Grouped)	YE Dec 03	YE Dec 04	YE Dec 05	% Change vs PY	03/05 ?	04/05 ?
Total (Responses)	18,438,805	16,854,675	14,251,683	-15.4%	-4,187,122	-2,602,992
Holiday	4,078,604	4,604,252	4,326,730	-6.0%		
VFR	4,096,000	4,806,884	5,028,166	4.6%		
Business	1,937,207	1,414,468	1,774,113	25.4%		
Education	4,717,610	3,556,301	1,199,454	-66.3%	-3,518,156	-2,356,847
Other	3,608,929	2,472,388	1,923,220	-22.2%		
Don't Know/Refused	455	383	-			
Hol + VFR + Bus	10,111,811	10,825,604	11,129,009	2.8%		
Leisure Travel (Hol + VFR)	8,174,604	9,411,136	9,354,896	-0.6%	1,180,292	-56,240

Between YE Dec 03 and YE Dec 05, there was a 74.6% decline in 'Education Nights' spent in Auckland

Between YE Dec 04 and YE Dec 05, there was a 66.3 % decline in 'Education Nights' spent in Auckland

VFR accounts for 53.7% of all international visitor nights in Auckland

The decline in the 'education' market accounts for 90.5% of the total decline in international visitor nights in Auckland

When one compares the traditional Hol + VFR + Bus results Auckland's growth in international nights is 2.8% year on year

Other' refers to medical etc

The Hotel Sector

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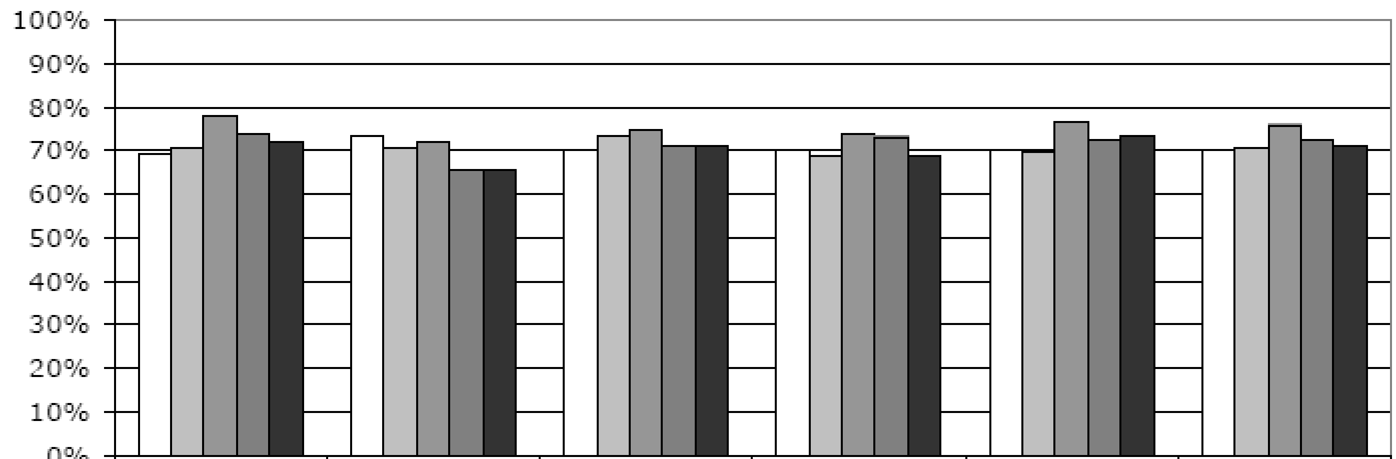
- An improving picture for Auckland

The Hotel Sector

Figure 8 NZHC Occupancy Rates

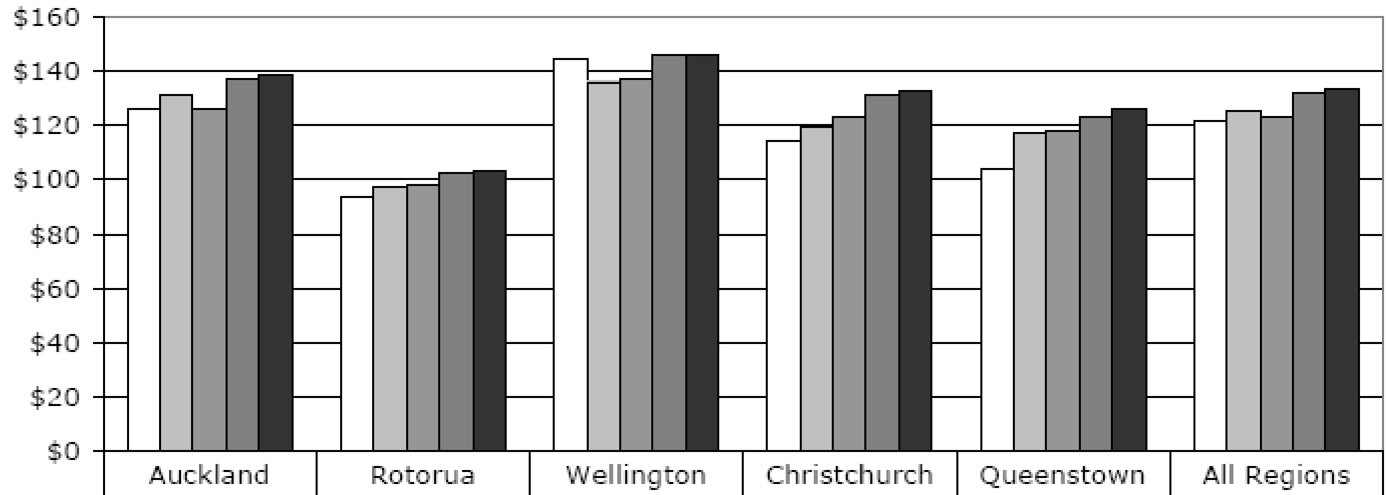


	Auckland	Rotorua	Wellington	Christchurch	Queenstown	All Regions
Sep-02	69.4%	73.6%	70.1%	70.1%	70.0%	70.0%
Sep-03	70.4%	70.8%	73.6%	68.6%	69.7%	70.5%
Sep-04	77.7%	72.0%	74.6%	73.8%	76.6%	75.9%
Sep-05	74.0%	65.4%	71.0%	73.1%	72.4%	72.2%
Sep-06	72.1%	65.5%	71.2%	68.7%	73.6%	70.9%

- Auckland second to Queenstown in terms of occupancy (YE Sep 06)

Hotel Sector

Figure 9 NZHC Average Rate ($NZ/room night sold *excluding* GST)



	Auckland	Rotorua	Wellington	Christchurch	Queenstown	All Regions
Sep-02	$125.61	$93.53	$144.36	$114.47	$103.81	$121.38
Sep-03	$130.91	$97.63	$135.92	$119.58	$117.23	$124.91
Sep-04	$125.95	$98.07	$136.73	$123.22	$117.98	$123.37
Sep-05	$136.84	$102.56	$146.19	$131.20	$123.15	$132.16
Sep-06	$138.33	$103.15	$145.53	$132.42	$125.67	$133.39

- Auckland second to Wellington in 'yield' (YE Sep 06)

Domestic Travel

(DTS – Statistics NZ)

- New Zealand Domestic Visits +1.4% on PY
- Auckland Domestic Visits +11.6% on PY
- Auckland Share of Domestic Visits 17.5%(PY 15.9%)

Domestic Travel (Overnight Visits)

Table: Number of Overnight Visits by RTO

	RTO Of All Destinations	YE Dec 04	YE Dec 05	Share YE Dec 04	Share YE Dec 05	Share Change	Change %
	Total	18,465,561	16,719,892				-9.5%
1	Auckland RTO	2,558,570	2,309,231	13.9%	13.8%	0.0%	-9.7%
2	Canterbury RTO	1,721,314	1,423,000	9.3%	8.5%	-0.8%	-17.3%
3	Wellington RTO	1,308,097	1,279,189	7.1%	7.7%	0.6%	-2.2%
4	Northland RTO	997,767	1,120,229	5.4%	6.7%	1.3%	12.3%
5	Waikato RTO	1,273,734	1,104,908	6.9%	6.6%	-0.3%	-13.3%
6	Coromandel RTO	731,291	833,234	4.0%	5.0%	1.0%	13.9%
7	Bay of Plenty RTO	943,563	805,776	5.1%	4.8%	-0.3%	-14.6%
8	Lake Taupo RTO	857,694	770,837	4.6%	4.6%	0.0%	-10.1%
9	Manawatu RTO	508,809	654,074	2.8%	3.9%	1.2%	28.6%
10	Hawke's Bay RTO	723,261	652,138	3.9%	3.9%	0.0%	-9.8%
11	Rotorua RTO	589,492	577,961	3.2%	3.5%	0.3%	-2.0%
17	Queenstown RTO	376,354	276,082	2.0%	1.7%	-0.4%	-26.6%

NZ total down by -9.5%

1.	Auckland	-9.7%,	share 13.8%
2.	Canterbury	-17.3%,	share 8.5%
3.	Wellington	-2.2%,	share 7.7%
11.	Rotorua	-2.0%	share 3.5%
17.	Queenstown	-26.6%	share 1.7%



Domestic Travel (Day Visits)

Table: Number of Day Visits by RTO

	RTO Of All Destinations	YE Dec 04	YE Dec 05	% share 2004	% share 2005	Change in share	% Change
	Total	34,055,432	36,541,791				7.3%
1	Auckland RTO	5,783,352	6,996,782	17.0%	19.1%	2.2%	21.0%
2	Waikato RTO	4,356,710	5,108,444	12.8%	14.0%	1.2%	17.3%
3	Canterbury RTO	3,008,981	3,417,915	8.8%	9.4%	0.5%	13.6%
4	Northland RTO	2,269,521	2,206,845	6.7%	6.0%	-0.6%	-2.8%
5	Manawatu RTO	1,837,745	1,731,091	5.4%	4.7%	-0.7%	-5.8%
6	Bay of Plenty RTO	1,291,043	1,726,713	3.8%	4.7%	0.9%	33.7%
7	Wellington RTO	1,799,842	1,606,733	5.3%	4.4%	-0.9%	-10.7%
8	Kapiti / Horowhenua RTO	1,499,922	1,410,148	4.4%	3.9%	-0.5%	-6.0%
9	Coromandel RTO	740,067	924,291	2.2%	2.5%	0.4%	24.9%
10	Rotorua RTO	928,314	902,107	2.7%	2.5%	-0.3%	-2.8%
26	Queenstown RTO	318,605	221,553	0.9%	0.6%	-0.3%	-30.5%

New Zealand +7.3%

1.	Auckland	+21.0%,	share 19.1%
3.	Canterbury	+13.6%	share 9.4%
7.	Wellington	-10.7%	share 4.4%
10.	Rotorua	-2.8%	share 2.5%
26.	Queenstown	-30.5%	share 0.6%

Domestic Travel (Total Visits)

Table: Number of Visits by RTO

	RTO Of All Destinations	YE Dec 04	YE Dec 05	% Share 04	% share 05	Share Change	Change %
	Total	52,520,993	53,261,683				1.4%
1	**Auckland RTO**	**8,341,922**	**9,306,013**	**15.9%**	**17.5%**	**1.6%**	**11.6%**
2	Waikato RTO	5,630,444	6,213,352	10.7%	11.7%	0.9%	10.4%
3	Canterbury RTO	4,730,295	4,840,915	9.0%	9.1%	0.1%	2.3%
4	Northland RTO	3,267,288	3,327,074	6.2%	6.2%	0.0%	1.8%
5	Wellington RTO	3,107,939	2,885,922	5.9%	5.4%	-0.5%	-7.1%
6	Bay of Plenty RTO	2,234,606	2,532,489	4.3%	4.8%	0.5%	13.3%
7	Manawatu RTO	2,346,554	2,385,165	4.5%	4.5%	0.0%	1.6%
8	Coromandel RTO	1,471,358	1,757,525	2.8%	3.3%	0.5%	19.4%
9	Kapiti / Horowhenua	1,772,295	1,648,240	3.4%	3.1%	-0.3%	-7.0%
10	Lake Taupo RTO	1,654,302	1,603,014	3.1%	3.0%	-0.1%	-3.1%
11	Rotorua RTO	1,517,806	1,480,068	2.9%	2.8%	-0.1%	-2.5%
24	Queenstown RTO	694,959	497,635	1.3%	0.9%	-0.4%	-28.4%

New Zealand Visits +1.4%

1. Auckland +11.6%, share 17.5%(PY 15.9%)

3. Canterbury +2.3%, share 9.1% (PY 9.0%)

5. Wellington -7.1%, share 5.4% (PY 5.9%)

6. Rotorua -2.5%, share 2.8% (PY 2.9%)

24. Queenstown -28.4%, share 0.9% (PY 1.3%)



DTS – Expenditure Summary

Table: Trip Type by Year End: Auckland RTO, Expenditure

Note: Expenditure EXCLUDES Transportation costs, which frequently are incurred in the Origin rather than Destination.

	Year End			
Trip Type	Year ended Dec 03	Year ended Dec 04	Year ended Dec 05	
Day Trip	300,843,936	284,570,547	300,391,447	5.6%
Overnight Trip	542,276,870	482,593,208	449,107,668	-6.9%
	843,120,806	767,163,755	749,499,115	-2.3%

Table: Trip Type by Year End: Expenditure

	Year End			
Trip Type	Year ended Dec 03	Year ended Dec 04	Year ended Dec 05	
Day Trip	2,136,701,201	1,967,008,638	1,697,476,557	-13.7%
Overnight Trip	3,725,668,038	3,354,200,335	3,044,229,815	-9.2%
	5,862,369,239	5,321,208,973	4,741,706,372	-10.9%

The Impact of NZ residents Outbound

NZ Residents Outbound Travel
Source: Statistics New Zealand

	2003	2004	2005	2006	2005 (Aust)	2006 (Aust)
Jan	112,437	80,386	97,765	107,655	50820	56940
Feb	63,922	84,618	93,535	91,116	53924	51454
Mar	87,461	113,646	135,209	123,590	75371	68607
Apr	5,060	144,074	159,567	162,790	84140	84006
May	108,337	136,819	146,651	147,929	70679	71211
Jun	121,855	168,959	172,459	187,785	79649	82302
Jul	138,273	183,307	205,182	186,755	97692	90020
Aug	125,333	162,696	171,663		89075	
Sep	149,515	186,305	195,819		96096	
Oct	125,811	150,237	161,320		90612	
Nov	132,644	148,484	144,197		68094	
Dec	147,882	173,679	188,434		84999	
TOTAL	1,320,533	1,735,214	1,873,806	1,009,626	941,151	504,540
		31.4%	8.0%	2.0%		

Aus YE Jul 06 933416

YE Jul 06 1,869,053
YE Jul 05 1,831,769

- High growth in NZ Residents outbound has impacted on domestic travel patterns and spend.
- Growth has eased from a 2004 year high of 31.4% to 2.0% for the YE Jul 06.

-ENDS-