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Rotorua Tourism In Focus

May 2010



FOREWARD

15 July 2010

Kia Ora Industry Partners,

Nationally, the month of May 2010 showed negative growth in visitor activity over the same month of the previous year. International visitor arrivals to New Zealand for the month of May 2010 were down 0.4% to 141,336 arrivals and visitor nights spent in commercial accommodation nationwide were down 6.1% to 1,881,253 visitor nights. H1N1 influenza related cancellations by many Asian markets in May last year have resulted in double digit growth in visitor arrivals from those countries for the month of May 2010 when compared to May 2009.

Visitor nights in Rotorua's commercial accommodation for the month of May 2010 were down 13.8% over the same month of the previous year – there was decreased growth in both domestic visitor nights (down 21.3%) and in international visitor nights (down 2.2%). For the same period, all sectors of Rotorua's commercial accommodation had decreased growth - hotels down 0.4%, motels down 21.6%, holiday parks down 26.3% and backpackers down 24.8%.

For the month of May 2010 there was a 1.4% decrease in visitor nights spent in Rotorua's private homes over the same month of the previous year – there was decreased growth in domestic visitor nights (down 10.4%) and increased growth in international visitor nights (up 27.1%).

Visits to Rotorua Attraction & Activities Monitor sites for the month of May 2010 were up 4.5% on the same month of the previous year – there was increased growth in both domestic visits (up 1.2%) and in international visits (up 6.6%).

I invite you to read on for detailed information on Rotorua's visitor activity for the month of May 2010.

Kind regards



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Subscription and Enquiry

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Contents

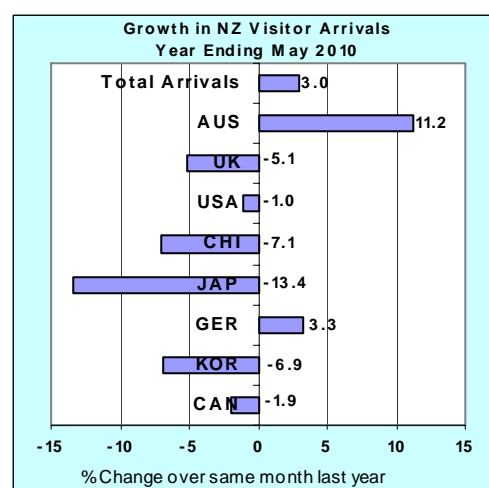
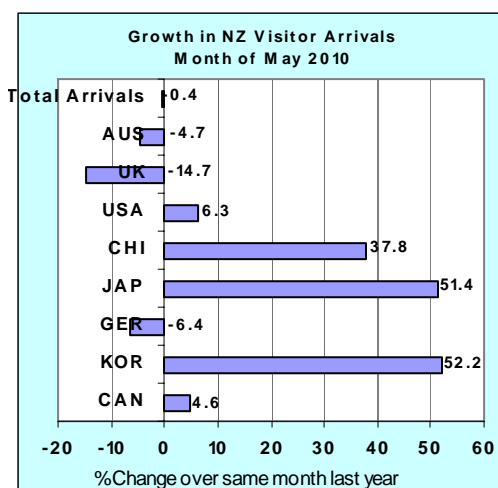
Foreward	1
NEW ZEALAND VISITOR ACTIVITY	
• International Visitor Arrivals	2
• Resident Short-Term Departures	5
• NZ Commercial Accommodation	
o Visitor Night Benchmarking	8
o Domestic Visitor Night Benchmarking	11
o International Visitor Night Benchmarking	14
ROTORUA VISITOR ACTIVITY	
• Rotorua Commercial Accommodation Monitor	
o Key Performance Indicators	17
o Sector Analysis	19
o Occupancy Analysis	22
• Rotorua Private Homes Monitor	24
• Rotorua Attraction & Activities Monitor	26
Data Sources and Disclaimer	29

International Visitor Arrivals (IVA) to New Zealand

New Zealand International Visitor Arrivals is the number of visitor arrivals to New Zealand air and sea ports as measured by the arrivals cards collected by New Zealand Immigration and reported by Statistics New Zealand in the Overseas Visitor Arrivals section of External Migration. While the total count for international visitor arrivals is the actual count, the counts for arrivals by country is derived from a systematic random sample taken from arrival cards each month and is therefore subject to sampling errors.

• Latest Performance

- For the **month** of May 2010, there was a 0.4% decrease in visitor arrivals to New Zealand on the previous year – the greatest growth in key markets was from Korea (up 52.2%) and the least growth was from UK (down 14.7%).
- For the **year ending** May 2010, there was a 3.0% increase in visitor arrivals to New Zealand on the previous year – the greatest growth in key markets was from Australia (up 11.2%) and the least growth was from Japan (down 13.4%).



• Summary Indicators

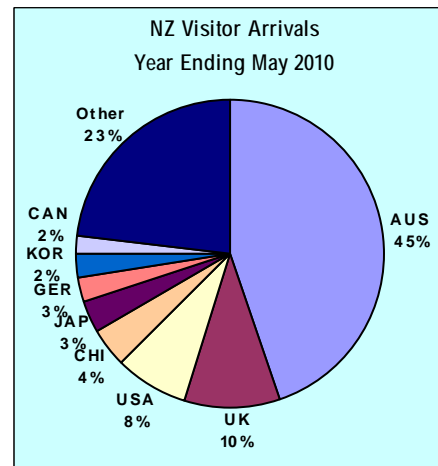
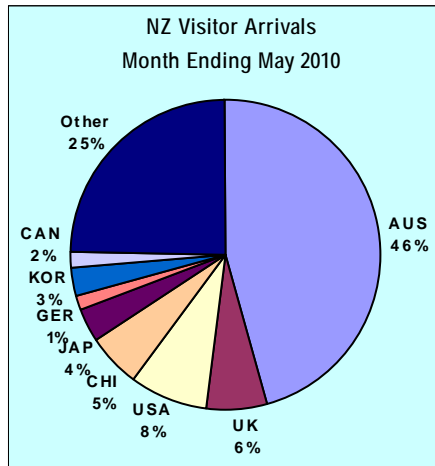
- For the **month** of May 2010, there were 141,336 visitor arrivals to New Zealand, down 580 arrivals or 0.4% on the previous year – visitor arrivals from: Australia down 4.7% to 64,300 arrivals, UK down 14.7% to 9,040 arrivals, USA up 6.3% to 11,520 arrivals, China up 37.8% to 7,740 arrivals, Japan down 51.4% to 5,340 arrivals, Germany down 6.4% to 1,820 arrivals, Korea up 52.2% to 4,300 arrivals and Canada up 4.6% to 2,260 arrivals.
- For the **year ending** May 2010, there were 2,490,601 visitor arrivals to New Zealand, up 71,954 or 3.0% on the previous year - visitor arrivals from: Australia up 11.2% to 1,114,121 arrivals, UK down 5.1% to 250,068 arrivals, USA down 1.0% to 195,036 arrivals, China down 7.1% to 102,246 arrivals, Japan down 13.4% to 80,687 arrivals, Germany up 3.3% to 65,049 arrivals, Korea down 6.9% to 60,198 arrivals, and Canada down 1.9% to 48,777 arrivals.

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
Visitor Arrivals - Total	140,483	141,916	141,336	1.0	-0.4	2,482,881	2,418,647	2,490,601	-2.6	3.0
Australia	58,240	67,446	64,300	15.8	-4.7	966,383	1,001,880	1,114,121	3.7	11.2
UK	11,000	10,602	9,040	-3.6	-14.7	290,852	263,505	250,068	-9.4	-5.1
USA	10,640	10,836	11,520	1.8	6.3	218,279	197,055	195,036	-9.7	-1.0
China	8,360	5,616	7,740	-32.8	37.8	125,424	110,039	102,246	-12.3	-7.1
Japan	6,060	3,528	5,340	-41.8	51.4	115,253	93,164	80,687	-19.2	-13.4
Germany	1,740	1,944	1,820	11.7	-6.4	60,764	62,980	65,049	3.6	3.3
Korea	6,200	2,826	4,300	-54.4	52.2	90,197	64,661	60,198	-28.3	-6.9
Canada	2,240	2,160	2,260	-3.6	4.6	52,062	49,741	48,777	-4.5	-1.9

NEW ZEALAND VISITOR ACTIVITY

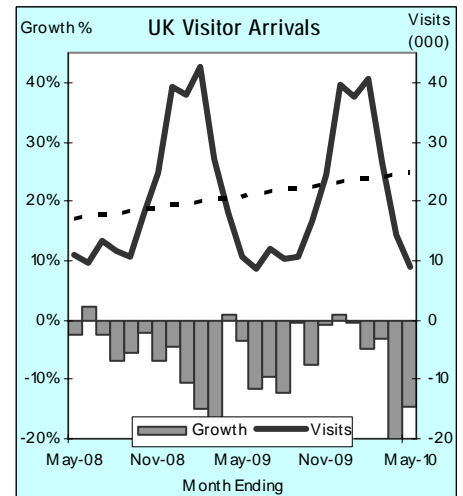
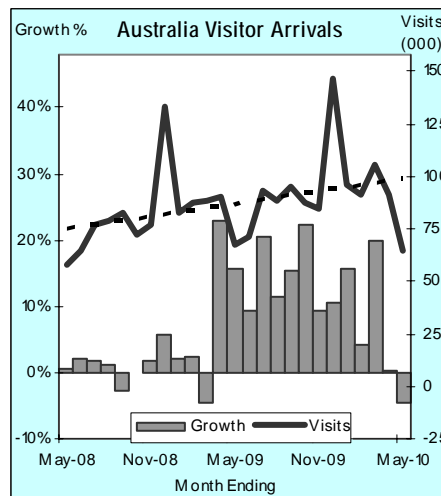
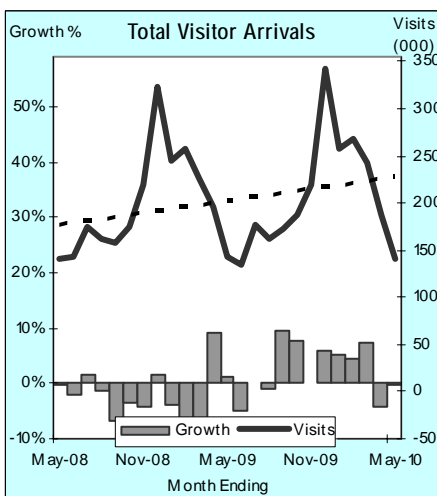
Market Segmentation

- For the **month** of May 2010, Australia arrivals accounted for 46% of visitor arrivals to New Zealand, USA for 8%, UK for 6%, China for 5%, Japan for 4%, Korea for 3%, Canada for 2% and Germany for 1% and other countries collectively for the remaining 25%.
- For the **year** ending May 2010, Australia arrivals accounted for 45% of visitor arrivals to New Zealand, UK for 10%, USA for 8%, China for 4%, Japan and Germany for 3% each, Korea and Canada for 2% each, and other countries collectively for the remaining 23%.



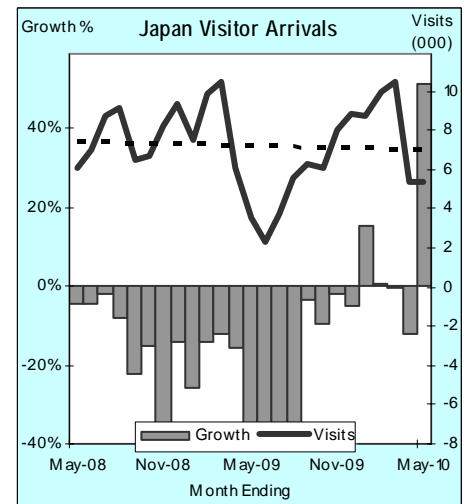
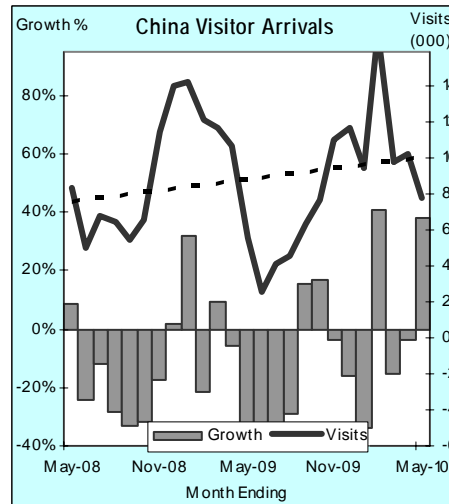
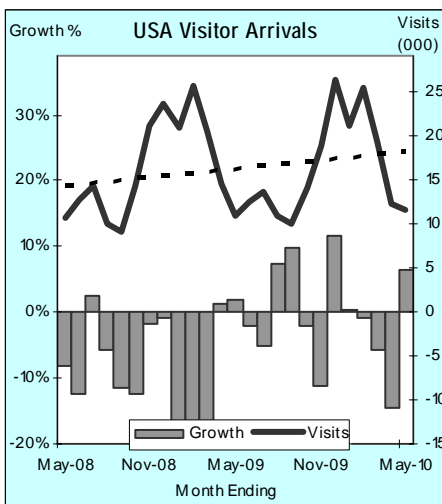
Trends & Patterns

- There is a seasonal pattern in visitor arrivals into **New Zealand**, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in 10 of the most recent 14 months, following a period of decreased growth, and overall has resulted in an upward trend in visitor arrivals.
- There is a pattern in **Australia** visitor arrivals coinciding with school holiday periods with the steepest peaks during the summer season – the graphed period shows increased growth in 22 of the most recent 25 months, and overall has resulted in an upward trend in visitor arrivals.
- There is a seasonal pattern in **United Kingdom** visitor arrivals, with peaks occurring in the summer season and troughs in the winter – the graphed period shows smaller decreases in growth in many of the most recent 14 months than occurred in the earlier months, and overall has resulted in an upward trend in visitor arrivals.

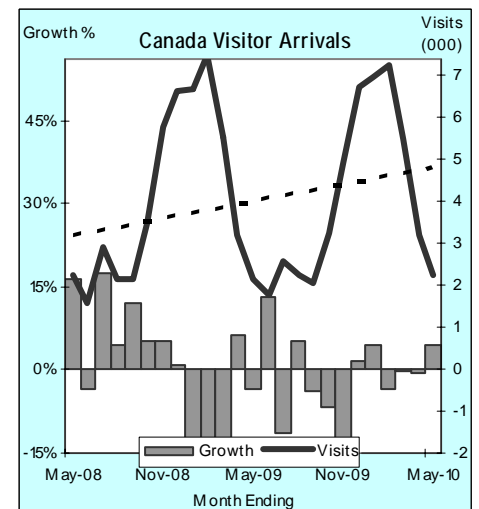
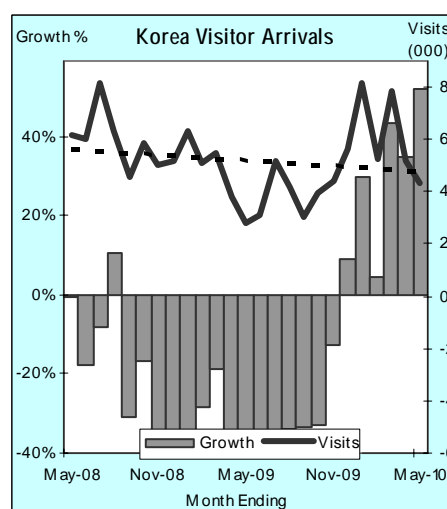
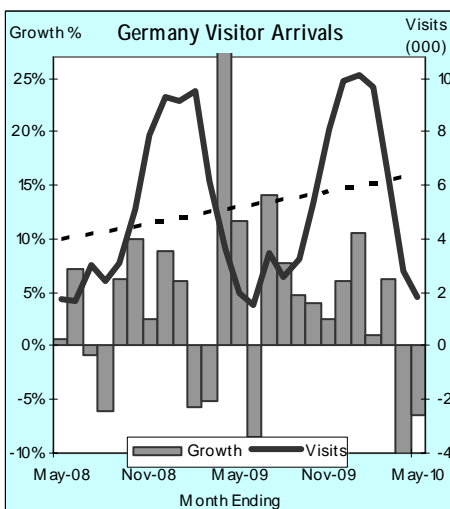


NEW ZEALAND VISITOR ACTIVITY

- There is a seasonal pattern in **USA** visitor arrivals, with peaks that coincide with both the New Zealand summer season and the northern hemisphere summer holiday season and troughs in the shoulder season – the graphed period shows increased growth seven of the most recent 14 months, following a period of decreased growth, and overall has resulted in an upward trend in visitor arrivals.
- There is a seasonal pattern in **China** visitor arrivals, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in eight of the past 25 months, and overall has resulted in an upward trend in visitor arrivals.
- There is a seasonal pattern in **Japan** visitor arrivals, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in three of the most recent five months, but follows 27 consecutive months of decreased growth, and overall has resulted in a downward trend in visitor arrivals.



- There is a seasonal pattern in **Germany** visitor arrivals, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in nine of the most recent 11 months, following a period of growth alternating between periods of increase and decline and overall has resulted in an upward trend in visitor arrivals.
- There is a seasonal pattern in **Korea** visitor arrivals, with peaks that coincide with both the New Zealand summer season and the northern hemisphere summer holiday season and troughs in the shoulder season – the graphed period shows the sixth consecutive month of increased growth, following a period of decreased growth dating back to May 2007, and overall has resulted in a downward trend in visitor arrivals.
- There is a seasonal pattern in **Canada** visitor arrivals, with peaks occurring in the summer season and troughs in the winter – the graphed period shows decreased growth in 11 of the most recent 17 months, following a period of increased growth, and overall has resulted in an upward trend in visitor arrivals.



• Data Sources

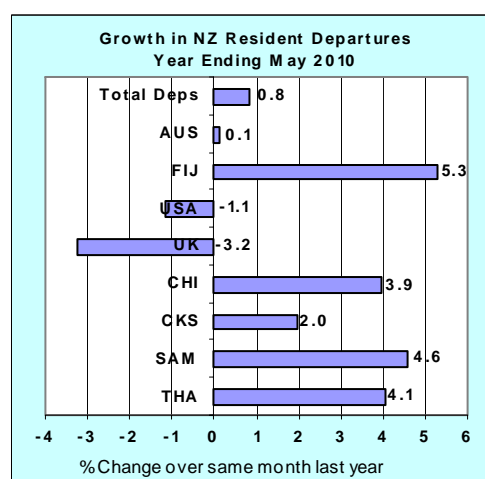
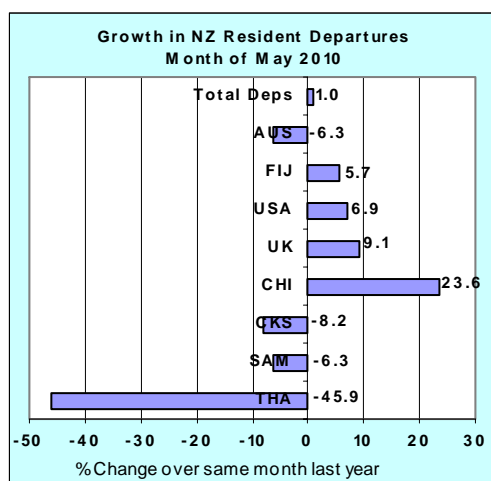
- Statistics New Zealand – External Migration, Short-term Overseas Visitor Arrivals

Resident Short-Term Departures from New Zealand

Resident short-term departures from New Zealand is the number of residents departing New Zealand air and sea ports as measured by the departure cards collected by New Zealand Immigration and reported by Statistics New Zealand in the Short-term New Zealand-resident Traveller Departures section of External Migration.

• Latest Performance

- For the **month** of May 2010, there was a 1.0% increase in resident short-term departures from New Zealand on the previous year – the greatest growth in key destinations was to China (up 23.6%) and the least growth was to Thailand (down 45.9%).
- For the **year ending** May 2010, there was a 0.8% increase in resident short-term departures from New Zealand on the previous year – the greatest growth in key destinations was to Fiji (up 5.3%) and the least growth was to UK (down 3.2%).



• Summary Indicators

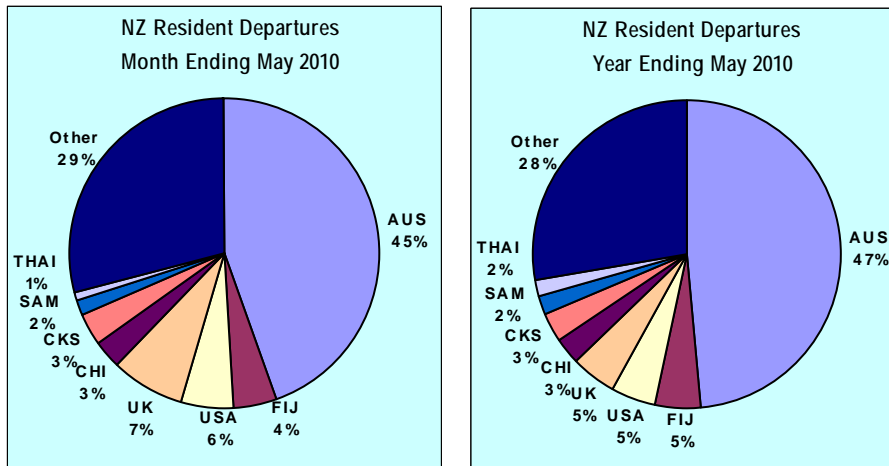
- For the **month** of May 2010, there were 165,397 resident short-term departures from New Zealand, up 1,711 departures or 1.0% on the previous year – resident departures to: Australia down 6.3% to 73,536 departures, Fiji up 5.7% to 7,416 departures, USA up 6.9% to 9,288 departures, UK up 9.1% to 12,096 departures, China up 23.6% to 5,328 departures, Cook Islands down 8.2% to 5,232 departures, Samoa down 6.3% to 3,072 departures and Thailand down 45.9% to 1,392 departures.
- For the **year ending** May 2010, there were 1,945,653 resident short-term departures from New Zealand, up 16,140 or 0.8% on the previous year - resident departures to: Australia up 0.1% to 943,273 departures, Fiji up 5.3% to 97,032 departures, USA down 1.1% to 90,721 departures, UK down 3.2% to 87,853 departures, China up 3.9% to 58,872 departures, Cook Islands up 2.0% to 55,530 departures, Samoa up 4.6% to 41,466 departures and Thailand up 4.1% to 30,295 departures.

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
Resident Deps - Total	173,983	163,686	165,397	-5.9	1.0	1,999,576	1,929,513	1,945,653	-3.5	0.8
Australia	84,408	78,518	73,536	-7.0	-6.3	976,418	942,225	943,273	-3.5	0.1
Fiji	7,800	7,018	7,416	-10.0	5.7	96,415	92,177	97,032	-4.4	5.3
USA	8,928	8,690	9,288	-2.7	6.9	92,829	91,770	90,721	-1.1	-1.1
UK	11,976	11,088	12,096	-7.4	9.1	96,151	90,776	87,853	-5.6	-3.2
China	4,344	4,312	5,328	-0.7	23.6	60,790	56,640	58,872	-6.8	3.9
Cook Islands	5,376	5,698	5,232	6.0	-8.2	53,818	54,464	55,530	1.2	2.0
Samoa	3,240	3,278	3,072	1.2	-6.3	37,339	39,652	41,466	6.2	4.6
Thailand	2,400	2,574	1,392	7.3	-45.9	31,427	29,108	30,295	-7.4	4.1

NEW ZEALAND VISITOR ACTIVITY

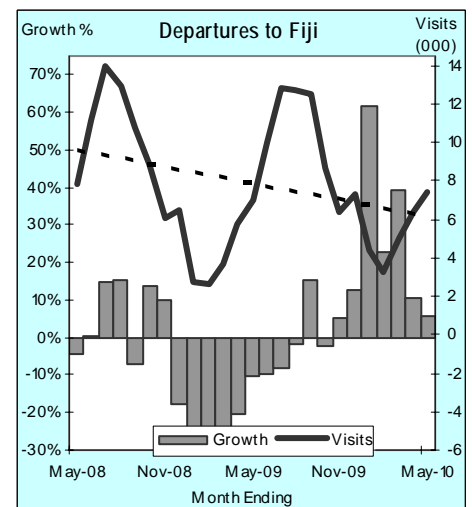
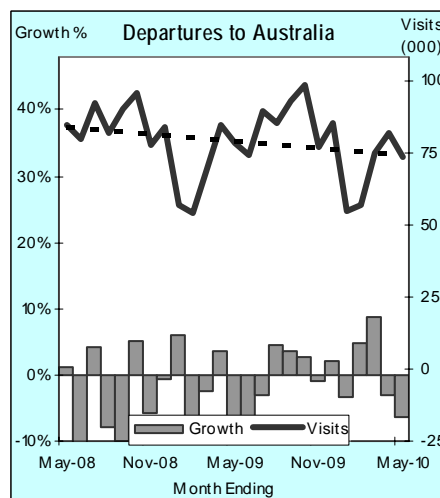
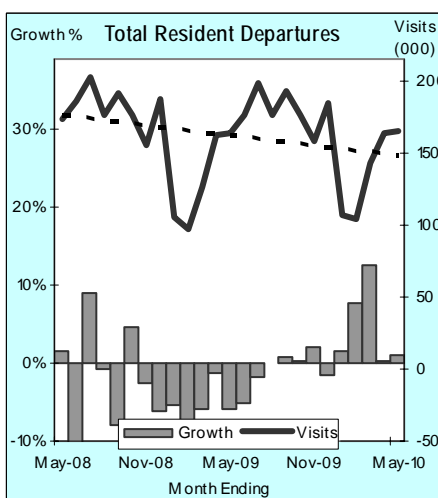
Market Segmentation

- For the **month** of May 2010, departures for Australia accounted for 45% of resident departures from New Zealand, UK for 7%, USA for 6%, Fiji for 4%, China and Cook Islands for 3% each, Samoa for 2%, Thailand for 1%, and other countries collectively for the remaining 29%.
- For the **year** ending May 2010, departures for Australia accounted for 47% of resident departures from New Zealand, Fiji, USA and UK for 5% each, China and Cook Islands for 3% each, Samoa and Thailand for 2% each, and other countries collectively for the remaining 28%.



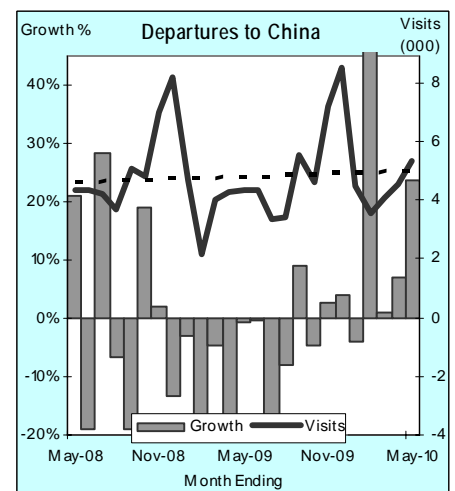
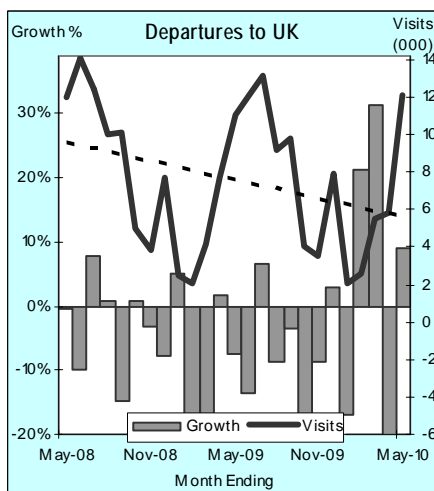
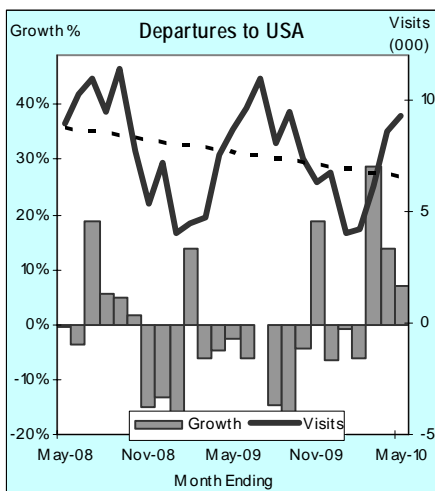
Trends & Patterns

- There is a pattern in resident departures from **New Zealand** coinciding with school holiday periods, where peaks occur during the school holidays and a trough during the month of January – the graphed period shows increased growth in nine of the most recent 10 months, following a period of decreased growth, and overall has resulted in a downward trend in resident departures.
- There is a pattern in resident departures from New Zealand to **Australia** coinciding with school holiday periods, where the steepest peak occurs during the spring school holidays and a trough during the month of January – the graphed period shows growth alternating between periods of increase and decline, and overall has resulted in a downward trend in resident departures.
- There is a seasonal pattern in resident departures from New Zealand to **Fiji** where peaks occur during the winter season and troughs in the summer season – the graphed period shows increased growth in eight of the most recent nine months, following a period of decreased growth, and overall has resulted in a downward trend in resident departures.

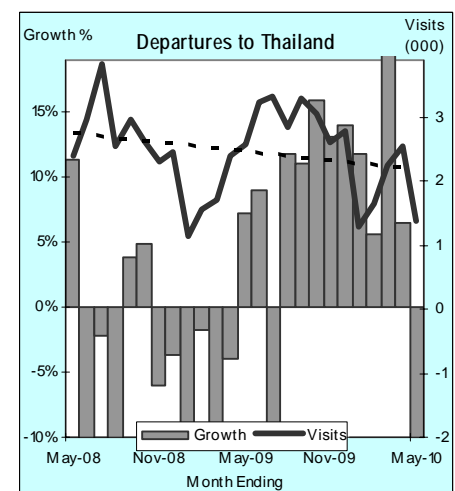
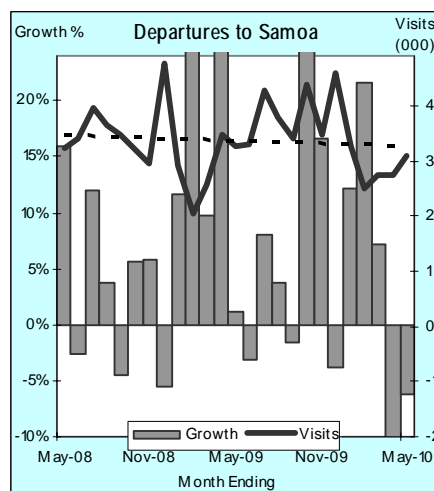
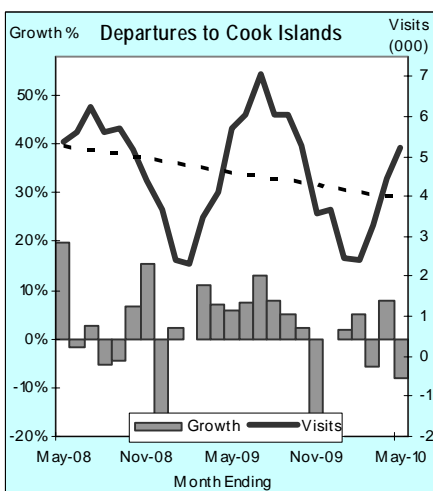


NEW ZEALAND VISITOR ACTIVITY

- There is a pattern in resident departures from New Zealand to **USA** coinciding with school holiday periods, where peaks occur during the mid winter and spring school holidays and a trough during the month of January – the graphed period shows decreased growth in 13 of the most recent 19 months, following a period of increased growth, and overall has resulted in a downward trend in resident departures.
- There is a seasonal pattern in resident departures from New Zealand to **United Kingdom**, with peaks occurring in the northern hemisphere summer season and troughs in the northern hemisphere winter season – the graphed period shows growth alternating between periods of increase and decrease, and overall has resulted in a downward trend in resident departures.
- There is a pattern in resident departures from New Zealand to **China** coinciding with the end of year school holiday and is possibly associated with New Zealand resident Chinese students visiting family in China – the graphed period shows increased growth in seven of the most recent nine months, following a period of decreased growth, and overall has resulted in an upward trend in resident departures.



- There is a seasonal pattern in resident departures from New Zealand to **Cook Islands** where peaks occur during the winter season and troughs in the summer season – the graphed period shows increased growth in 18 of the most recent 25 months, and overall has resulted in a downward trend in resident departures.
- There is a pattern in resident departures from New Zealand to **Samoa** coinciding with both school holiday periods and seasonality, which can possibly be attributed to the visiting friends and relatives market and the holiday market – the graphed period shows increased growth in 17 of the 25 graphed months, but overall has resulted in a downward trend in resident departures.
- There is a seasonal pattern in resident departures from New Zealand to **Thailand** where peaks occur during the winter season and troughs in the summer season – the graphed period shows increased growth in 11 of the most recent 13 months, following a period of decreased growth, and overall has resulted in a downward trend in resident departures.



• Data Sources

- Statistics New Zealand – External Migration, Short-term NZ-resident Traveller Departures

NZ Commercial Accommodation Monitor (CAM)

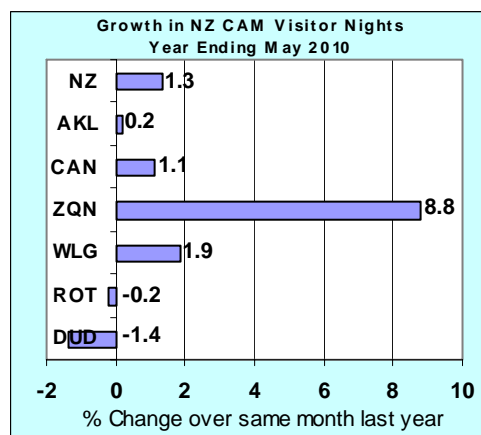
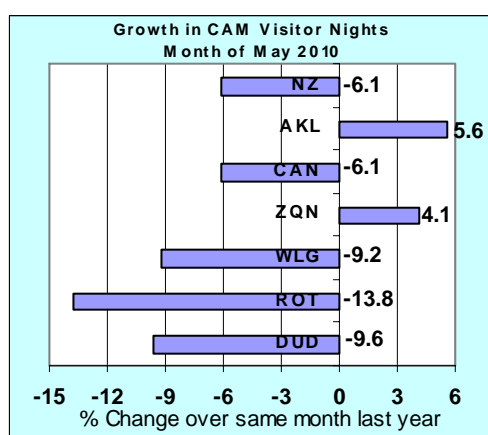
The Commercial Accommodation Monitor is a measure of the estimated visitor activity occurring at commercial accommodation premises (ie. hotels, motels, backpackers and holiday parks) throughout New Zealand. All accommodation businesses meeting the criteria for the monitor are required to make monthly submissions of visitor activity variables to Statistics New Zealand, which then reports the aggregated results in the Commercial Accommodation Monitor.

CAUTION: The Statistics New Zealand Commercial Accommodation Monitor was adjusted in September 2009 as follows: the 'hosted' accommodation group was removed; and the regional boundaries were updated. Accordingly the commercial accommodation data in this section is NOT directly comparable to the same section of the Rotorua Tourism In Focus reports prior to the September 2009 survey month.

NZ CAM Visitor Night Benchmarking – Top 6 Regional Tourism Organisations

- Latest Performance

- For the **month** of May 2010, there was a 6.1% decrease in visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Auckland (up 5.6%) and the least growth was in Rotorua (down 13.8%).
- For the **year** ending May 2010, there was a 1.3% increase in visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Queenstown (up 8.8%) and the least growth was in Dunedin (down 1.4%).



- Summary Indicators

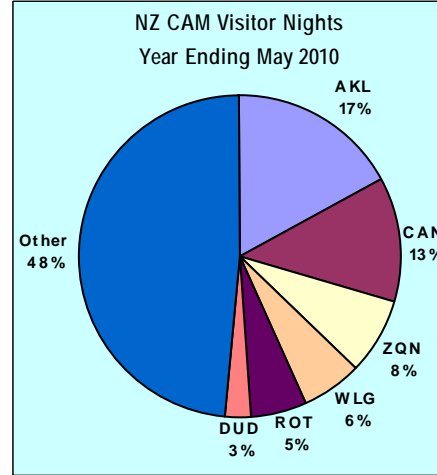
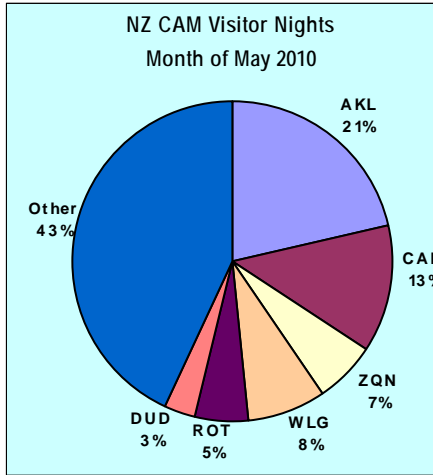
- For the **month** of May 2010, there were 1,881,253 visitor nights nationwide, down 122,189 nights or 6.1% on the previous year – visitor nights spent in Auckland up 5.6% to 404,445 nights, Canterbury down 6.1% to 236,088 nights, Queenstown up 4.1% to 124,309 nights, Wellington down 9.2% to 146,929 nights, Rotorua down 13.8% to 99,674 nights, and Dunedin down 9.6% to 58,579 nights.
- For the **year** ending May 2010, there were 32,224,167 visitor nights nationwide, up 422,565 nights or 1.3% on the previous year – visitor nights spent in Auckland up 0.2% to 5,517,422 nights, Canterbury up 1.1% to 4,043,039 nights, Queenstown up 8.8% to 2,444,752 nights, Wellington up 1.9% to 2,002,486 nights, Rotorua down 0.2% to 1,721,441 nights, and Dunedin down 1.4% to 854,359 nights.

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
NZ Visitor Nights	2,016,041	2,003,442	1,881,253	-0.6	-6.1	32,916,263	31,801,602	32,224,167	-3.4	1.3
Auckland	417,678	382,919	404,445	-8.3	5.6	5,707,303	5,506,130	5,517,422	-3.5	0.2
Canterbury	254,988	251,537	236,088	-1.4	-6.1	4,146,909	3,998,180	4,043,039	-3.6	1.1
Queenstown	127,290	119,422	124,309	-6.2	4.1	2,403,213	2,247,220	2,444,752	-6.5	8.8
Wellington	156,606	161,888	146,929	3.4	-9.2	1,959,238	1,965,559	2,002,486	0.3	1.9
Rotorua	120,356	115,574	99,674	-4.0	-13.8	1,878,183	1,725,570	1,721,441	-8.1	-0.2
Dunedin	63,154	64,833	58,579	2.7	-9.6	878,256	866,409	854,359	-1.3	-1.4

NEW ZEALAND VISITOR ACTIVITY

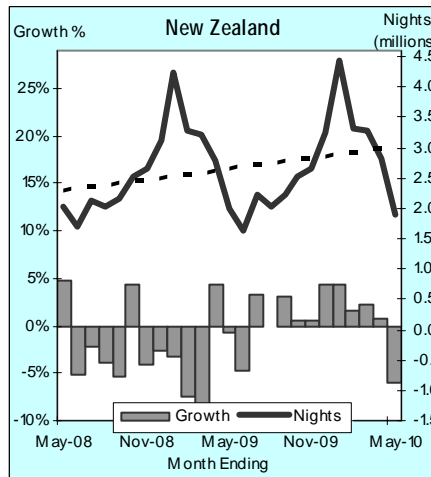
- **Market Share**

- For the **month** of May 2010, Auckland visitor nights accounted for 21% of nights, Canterbury for 13%, Wellington for 8%, Queenstown for 7%, Rotorua for 5%, Dunedin for 3% and the other RTOs collectively for the remaining 43%.
- For the **year ending** May 2010, Auckland visitor nights accounted for 17% of nights, Canterbury for 13%, Queenstown for 8%, Wellington for 6%, Rotorua for 5%, Dunedin for 3% and the other RTOs collectively for the remaining 48%.



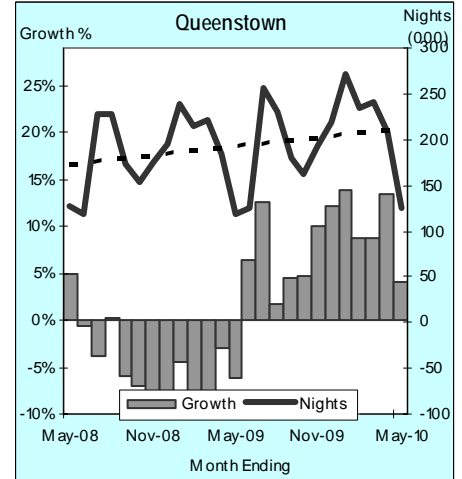
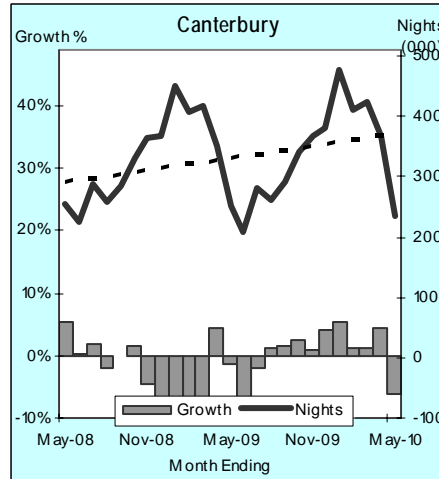
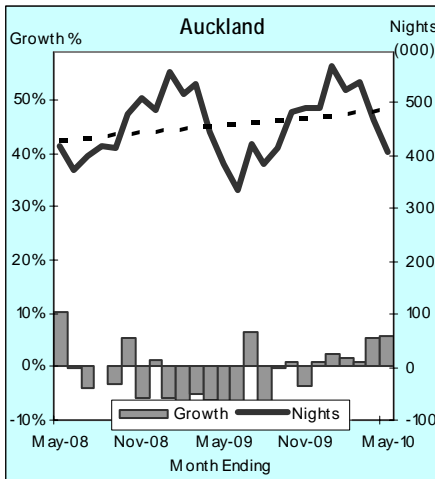
- **Trends & Patterns**

- There is a seasonal pattern in visitor nights **nationwide**, where peaks occur in the summer season and troughs in the winter – the graphed period shows the first month of decreased growth following ten consecutive months of increased growth, and overall has resulted in an upward trend in visitor nights.

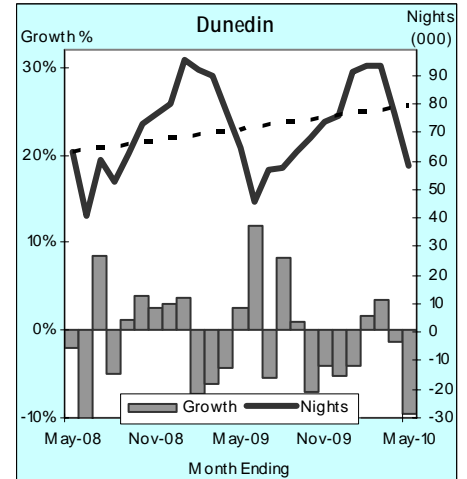
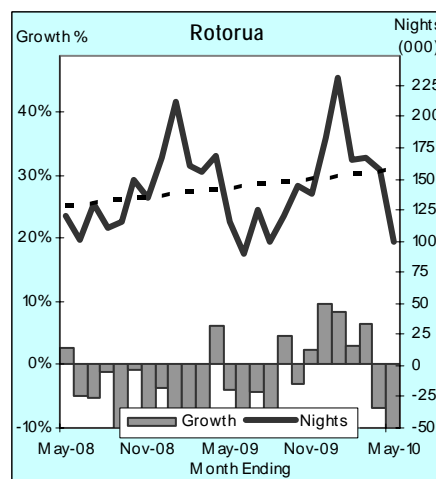
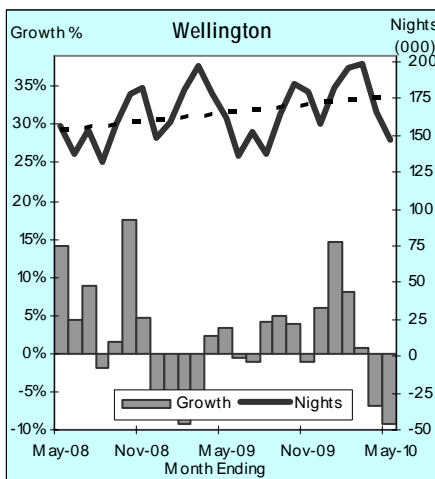


NEW ZEALAND VISITOR ACTIVITY

- There is a seasonal pattern in visitor nights spent in **Auckland**, where peaks occur in the summer season and troughs in the winter season – the graphed period shows increased growth in eight of the most recent 11 months, following a period of decreased growth, and overall has resulted in an upward trend in visitor nights.
- There is a seasonal pattern in visitor nights spent in **Canterbury**, where peaks occur in the summer season and troughs in the winter – the graphed period shows the first month of decreased growth, following nine consecutive months of increased growth, and overall has resulted in an upward trend in visitor nights
- There is a seasonal pattern in visitor nights spent in **Queenstown**, where peaks occur in the summer season and troughs in the winter prior to the ski season – the graphed period shows the twelfth consecutive month of increased growth, following a period of decreased growth, and overall has resulted in an upward trend in visitor nights.



- There is a seasonal pattern in visitor nights spent in **Wellington**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in nine of the most recent 14 months, following a period of decreased growth, and overall has resulted in an upward trend in the visitor nights.
- There is a seasonal pattern to visitor nights spent in **Rotorua**, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in six of the nine most recent months, following a period of decreased growth, and overall has resulted in an upward trend in visitor nights.
- There is a seasonal pattern in visitor nights spent in **Dunedin**, where peaks occur in the summer season and troughs in the winter – the graphed period shows growth alternating between period of increase and decline, and overall has resulted in an upward trend in visitor nights.



- **Data Sources**

Statistics New Zealand – Commercial Accommodation Monitor

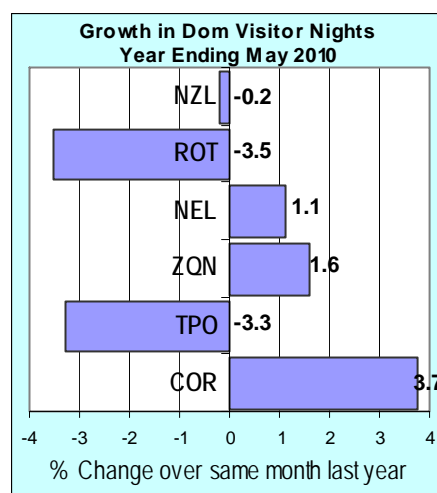
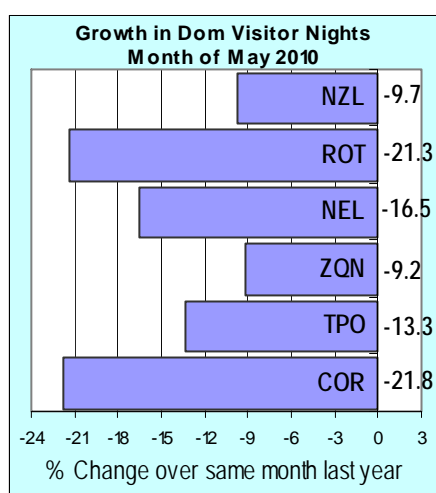
NZ CAM Domestic Visitor Night Benchmarking – Resort Regional Tourism Organisations

Previous to November 2007 only some regions were required to provide visitor origin data on a monthly basis, with the remaining regions providing it every third month, hence visitor origin data for the whole of New Zealand has been available only from late 2007 onwards. As the Rotorua Tourism in Focus report is Rotorua specific and Rotorua is a holiday resort destination only those regional tourism organisations that are also holiday resort areas have been included in this analysis.

CAUTION: The Statistics New Zealand Commercial Accommodation Monitor was adjusted in September 2009 as follows: the 'hosted' accommodation group was removed; and the regional boundaries were updated. Accordingly the commercial accommodation data in this section is NOT directly comparable to the same section of the Rotorua Tourism In Focus reports prior to the September 2009 survey month.

• Latest Performance

- For the **month** of May 2010, there was a 9.7% decrease in domestic visitor nights nationwide on the previous year – all the graphed regions had decreased growth with the least decrease occurring in Queenstown (down 9.2%) and the greatest decrease occurring in Coromandel (down 21.8%).
- For the **year** ending May 2010, there was a 0.2% decrease in domestic visitor nights nationwide on the previous year – the greatest growth in domestic visitor nights was in Coromandel (up 3.7%) and the least growth was in Rotorua (down 3.5%).



• Summary Indicators

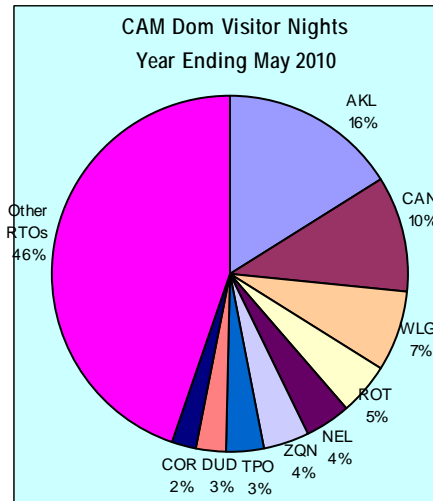
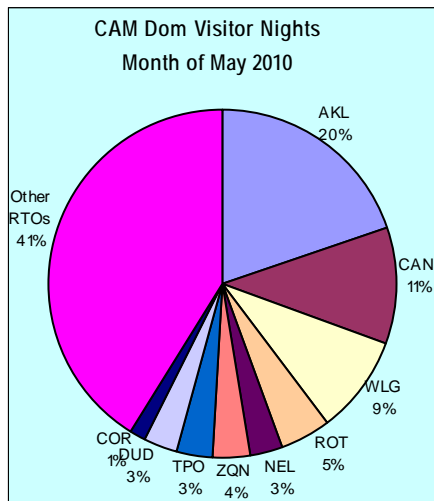
- For the **month** of May 2010, there were 1,138,099 domestic visitor nights nationwide, down 122,081 nights or 9.7% on the previous year – visitor nights spent in Rotorua down 21.3% to 54,954 nights, Nelson down 16.5% to 33,712 nights, Queenstown down 9.2% to 40,198 nights, Taupo down 13.3% to 35,372 nights and Coromandel down 21.8% to 14,861 nights.
- For the **year** ending May 2010, there were 18,666,354 domestic visitor nights nationwide, down 36,616 nights or 0.2% on the previous year – visitor nights spent in Rotorua down 3.5% to 904,969 nights, Nelson up 1.1% to 796,326 nights, Queenstown up 1.6% to 746,498 nights, Taupo down 3.3% to 651,479 nights and Coromandel up 3.7% to 438,012 nights.

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
NZ Dom Visitor Nights	1,265,829	1,260,180	1,138,099	-0.4	-9.7	N/A	18,702,970	18,666,354	N/A	-0.2
Rotorua	71,487	69,836	54,954	-2.3	-21.3	932,277	938,016	904,969	0.6	-3.5
Nelson	39,793	40,352	33,712	1.4	-16.5	837,522	787,560	796,326	-6.0	1.1
Queenstown	49,742	44,280	40,198	-11.0	-9.2	708,593	734,832	746,498	3.7	1.6
Taupo	44,417	40,794	35,372	-8.2	-13.3	709,202	673,575	651,479	-5.0	-3.3
Coromandel	18,351	19,007	14,861	3.6	-21.8	427,873	422,212	438,012	-1.3	3.7

NEW ZEALAND VISITOR ACTIVITY

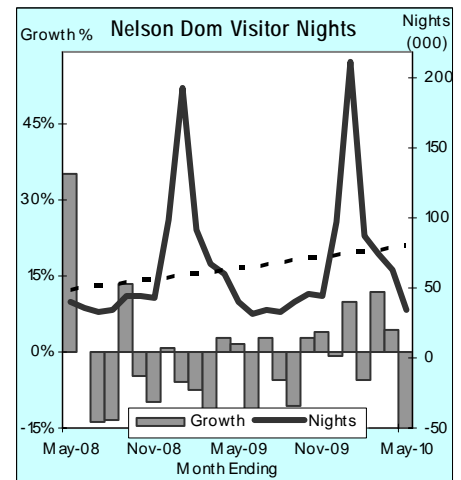
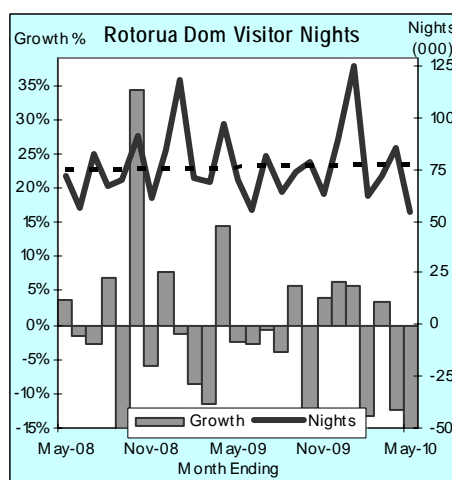
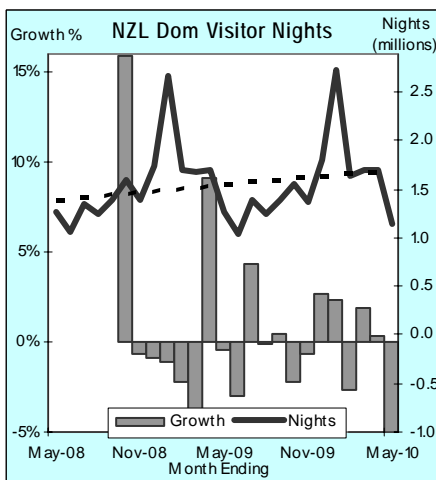
Market Share

- For the **month** of May 2010, Auckland accounted for 20% of domestic visitor nights, Canterbury for 11%, Wellington for 9%, Rotorua for 5%, Queenstown for 4%, Nelson, Taupo and Dunedin for 3% each, Coromandel for 1%, and the other RTOs collectively for the remaining 41%.
- For the **year** ending May 2010, Auckland accounted for 16% of domestic visitor nights, Canterbury for 10%, Wellington for 7%, Rotorua for 5%, Nelson and Queenstown for 4% each, Taupo and Dunedin for 3% each, Coromandel for 2% and the other RTOs collectively for the remaining 46%.



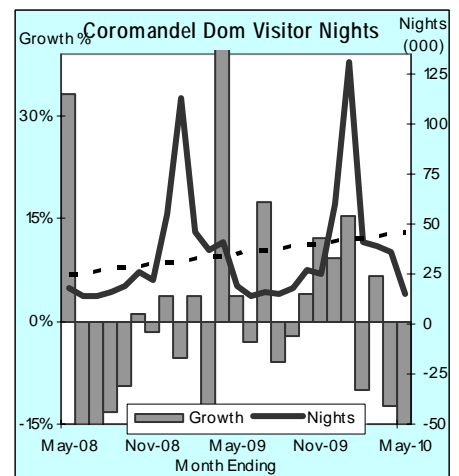
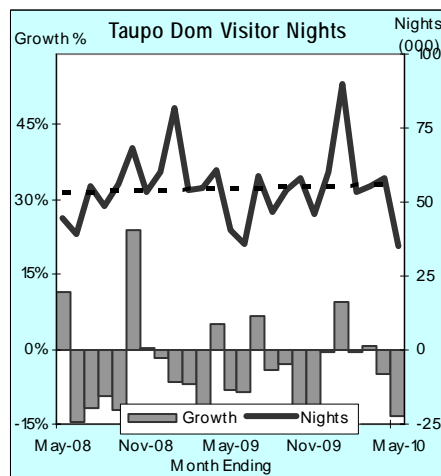
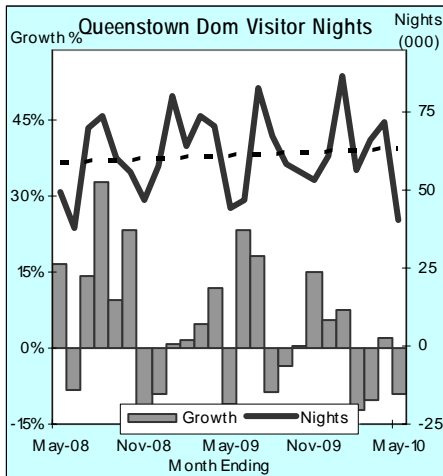
Trends & Patterns

- There is a seasonal pattern in domestic visitor nights **nationwide**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in six of the most recent 11 months, following a period of decreased growth, and overall has resulted in an upward trend in domestic visitor nights.
- There is a seasonal pattern in domestic visitor nights spent in **Rotorua**, where peaks occur in the summer season and troughs in the winter season – the graphed period shows growth alternating between increase and decline over the past 25 months, and overall has resulted in an upward trend in domestic visitor nights.
- There is a seasonal pattern in domestic visitor nights spent in **Nelson**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in eight of the most recent 14 months, following a period of decreased growth, and overall has resulted in an upward trend in domestic visitor nights.



NEW ZEALAND VISITOR ACTIVITY

- There is a seasonal pattern in domestic visitor nights spent in **Queenstown**, where peaks occur in the summer season and troughs in the winter prior to the ski season – the graphed period shows increased growth in 16 of the past 25 months, and overall has resulted in an upward trend in domestic visitor nights.
- There is a seasonal pattern in domestic visitor nights spent in **Taupo**, where peaks occur in the summer season and troughs in the winter – the graphed period shows smaller decreases in growth in the most recent six months, following a period of decreased growth, and overall has resulted in an upward trend in domestic visitor nights.
- There is a seasonal pattern in domestic visitor nights spent in **Coromandel**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in 11 of the most recent 20 months, following a period of decreased growth, and overall has resulted in an upward trend in domestic visitor nights.



DOMESTIC Visitor Night Growth Benchmarking – Month of May 2010

	All NZ	Rotorua	Your Biz	Example
Step 1. Enter YOUR domestic visitor nights for May 2010	1,138,099	54,954		550
Step 2. Enter YOUR domestic visitor nights for May 2009	1,260,180	69,836		500
Step 3. Subtract Step 2 from Step 1 .	-122,081	-14,882		50
Step 4. Divide Step 3 by Step 2 .	-0.097	-0.213		0.100
Step 5. Multiply Step 4 by 100 = Domestic Visitor Night growth	-9.7%	-21.3%	%	10.0%

Eg. An accommodation provider that had 550 domestic visitor nights for month of May 2010 has had a 10.0% increase in domestic visitor nights over the 500 domestic visitor nights for May 2009. The 10.0% increased growth in domestic visitor nights at this accommodation provider is better than the average growth in domestic visitor nights of all Rotorua accommodation providers (-21.3%) and also better than the average growth in domestic visitor nights at all New Zealand accommodation providers (-9.7%).

- **Data Sources**

- Statistics New Zealand – Commercial Accommodation Monitor

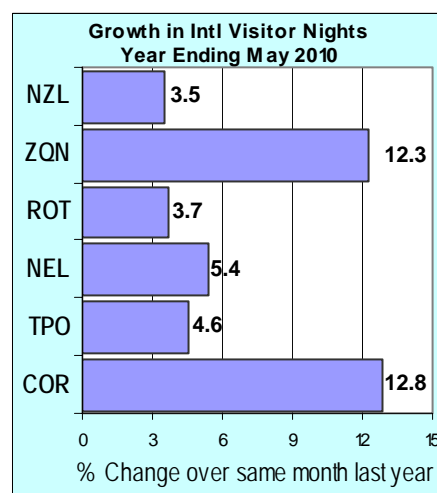
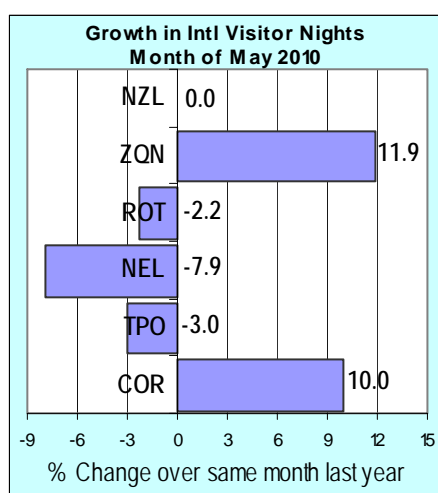
NZ International Visitor Night Benchmarking – Resort Regional Tourism Organisations

Previous to November 2007 only some regions were required to provide visitor origin data on a monthly basis, with the remaining regions providing it every third month, hence visitor origin data for the whole of New Zealand has been available only from late 2007 onwards. As the Rotorua Tourism in Focus report is Rotorua specific and Rotorua is a holiday resort destination, only those regional tourism organisations that are also holiday resort areas have been included in this analysis.

CAUTION: The Statistics New Zealand Commercial Accommodation Monitor was adjusted in September 2009 as follows: the 'hosted' accommodation group was removed; and the regional boundaries were updated. Accordingly the commercial accommodation data in this section is NOT directly comparable to the same section of the Rotorua Tourism In Focus reports prior to the September 2009 survey month.

• Latest Performance

- For the **month** of May 2010, there was no change in international visitor nights nationwide on the previous year – the greatest growth in international visitor nights was in Queenstown (up 11.9%) and the least growth was in Nelson (down 7.9%).
- For the **year** ending May 2010, there was a 3.5% increase in international visitor nights nationwide on the previous year – the greatest growth in international visitor nights was in Coromandel (up 12.8%) and the least growth was in Rotorua (up 3.7%).



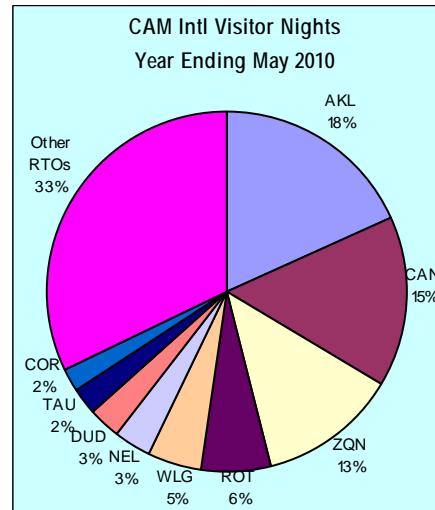
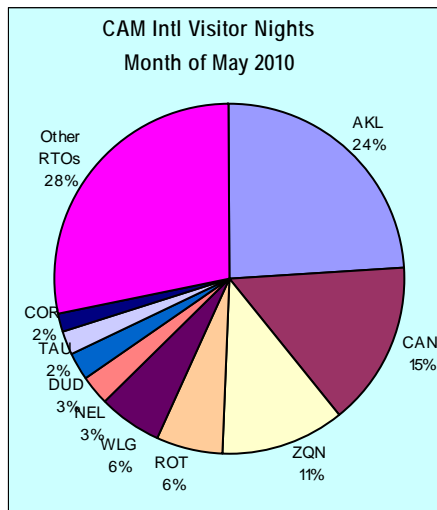
• Summary Indicators

- For the **month** of May 2010, there were 743,154 international visitor nights nationwide, down 108 nights or 0.0% on the previous year – visitor nights spent in Queenstown up 11.9% to 84,111 nights, Rotorua down 2.2% to 44,720 nights, Nelson down 7.9% to 20,031 nights, Taupo down 3.0% to 16,514 nights and Coromandel up 10.0% to 11,632 nights.
- For the **year** ending May 2010, there were 13,557,812 international visitor nights nationwide, up 459,177 nights or 3.5% on the previous year – visitor nights spent in Queenstown up 12.3% to 1,698,255 nights, Rotorua up 3.7% to 816,475 nights, Nelson up 5.4% to 453,449 nights, Taupo up 4.6% to 319,712 nights and Coromandel up 12.8% to 271,943 nights.

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
NZ Intl Visitor Nights	750,212	743,262	743,154	-0.9	0.0	N/A	13,098,635	13,557,812	N/A	3.5
Queenstown	77,548	75,141	84,111	-3.1	11.9	1,694,619	1,512,388	1,698,255	-10.8	12.3
Rotorua	48,869	45,739	44,720	-6.4	-2.2	945,903	787,554	816,475	-16.7	3.7
Nelson	19,827	21,740	20,031	9.6	-7.9	434,679	430,209	453,449	-1.0	5.4
Taupo	14,744	17,033	16,514	15.5	-3.0	282,931	305,712	319,712	8.1	4.6
Coromandel	9,216	10,578	11,632	14.8	10.0	225,328	241,003	271,943	7.0	12.8

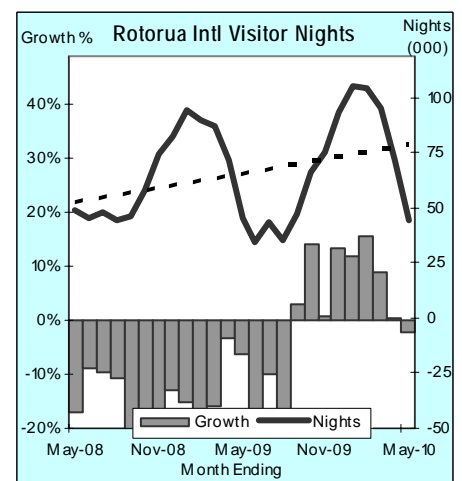
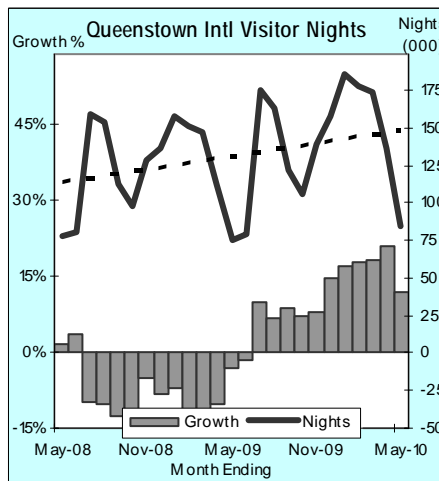
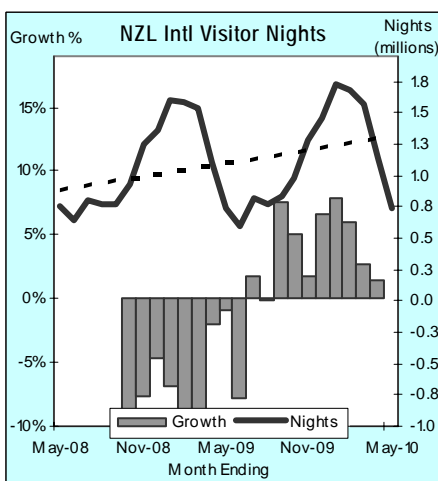
Market Share

- For the **month** of May 2010, Auckland accounted for 24% of international visitor nights, Canterbury for 15%, Queenstown for 11%, Rotorua and Wellington for 6% each, Nelson and Dunedin for 3% each, Taupo and Coromandel for 2% each, and the other RTOs collectively for the remaining 28%.
- For the **year** ending May 2010, Auckland accounted for 18% of international visitor nights, Canterbury for 15%, Queenstown for 13%, Rotorua for 6%, Wellington for 5%, Nelson and Dunedin for 3% each, Taupo and Coromandel for 2% each, and the other RTOs collectively for the remaining 33%.



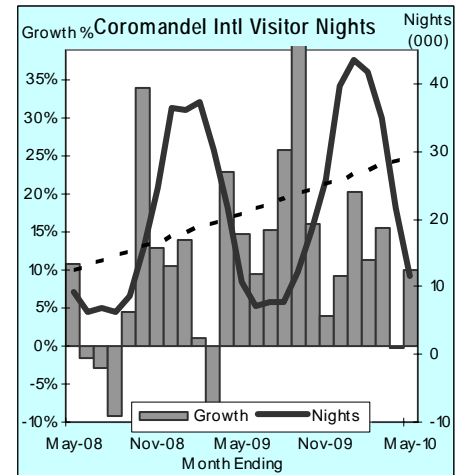
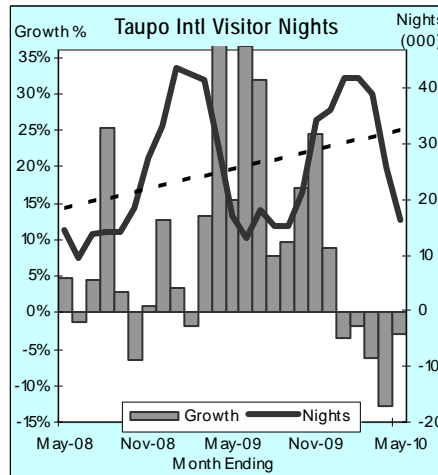
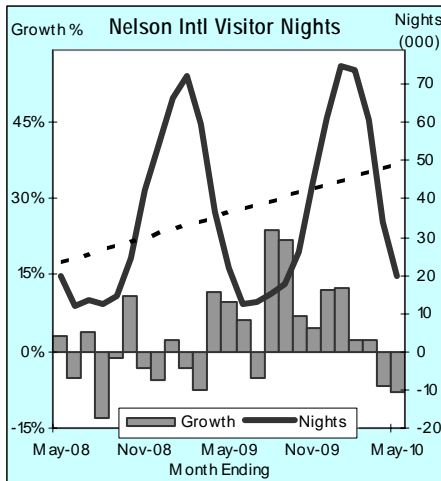
Trends & Patterns

- There is a seasonal pattern in international visitor nights **nationwide**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in 10 of the most recent 11 months, following a period of decreased growth, and overall has resulted in an upward trend in international visitor nights.
- There is a seasonal pattern in international visitor nights spent in **Queenstown**, where peaks occur in the summer season and troughs in the winter prior to the ski season – the graphed period shows the eleventh consecutive month of increased growth, following 12 consecutive months of decreased growth, and overall has resulted in an upward trend in international visitor nights.
- There is a seasonal pattern in international visitor nights spent in **Rotorua**, where peaks occur in the summer season and troughs in the winter season – the graphed period shows increased growth in eight of the nine most recent months, following 18 consecutive months of decreased growth and overall has resulted in an upward trend in international visitor nights.



NEW ZEALAND VISITOR ACTIVITY

- There is a seasonal pattern in international visitor nights spent in **Nelson**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in 11 of the most recent 14 months, following a period of decreased growth, and overall has resulted in an upward trend in international visitor nights.
- There is a seasonal pattern in international visitor nights spent in **Taupo**, where peaks occur in the summer season and troughs in the winter – the graphed period shows the fifth consecutive month of decreased growth, following a period of increased growth, and overall has resulted in an upward trend in international visitor nights.
- There is a seasonal pattern in international visitor nights spent in **Coromandel**, where peaks occur in the summer season and troughs in the winter – the graphed period shows increased growth in 20 of the past 25 months, and overall has resulted in an upward trend in international visitor nights



INTERNATIONAL Visitor Night Growth Benchmarking – Month of May 2010

	All NZ	Rotorua	Your Biz	Example
Step 1. Enter YOUR international visitor nights for May 2010	743,154	44,720		520
Step 2. Enter YOUR international visitor nights for May 2009	743,262	45,739		500
Step 3. Subtract Step 2 from Step 1 .	-108	-1,019		20
Step 4. Divide Step 3 by Step 2 .	0	0		0.040
Step 5. Multiply Step 4 by 100 = International Visitor Night growth	0.0%	-2.2%	%	4.0%

Eq. An accommodation provider that had 520 international visitor nights for month of May 2010 has had a 4.0% increase in international visitor nights over the 500 international visitor nights for May 2009. The 4.0% increased growth in international visitor nights at this accommodation provider is better than the average growth in international visitor nights of all Rotorua accommodation providers (-2.2%), and also better than the average growth in international visitor nights at all New Zealand accommodation providers (0.0%).

- **Data Sources**
 - Statistics New Zealand – Commercial Accommodation Monitor

Rotorua Commercial Accommodation Monitor (CAM)

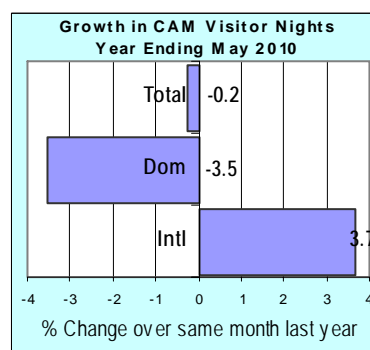
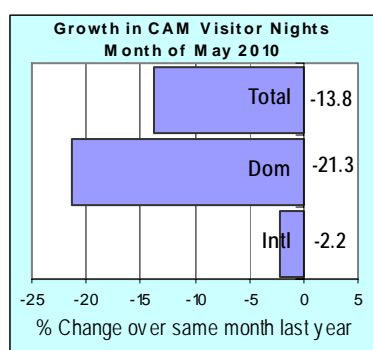
The Commercial Accommodation Monitor is a measure of the estimated visitor activity occurring at commercial accommodation premises (ie. hotels, motels, hostels, lodges and holiday parks) throughout New Zealand. All accommodation businesses meeting the criteria for the monitor are required to make monthly submissions of visitor activity variables to Statistics New Zealand, which then reports the aggregated results in the Commercial Accommodation Monitor.

CAUTION: The Statistics New Zealand Commercial Accommodation Monitor was adjusted in September 2009 as follows: the 'hosted' accommodation group was removed; and the regional boundaries were updated. Accordingly the commercial accommodation data in this section is NOT directly comparable to the same section of the Rotorua Tourism In Focus reports prior to the September 2009 survey month.

Rotorua CAM Key Performance Indicators

• Latest Performance

- For the **month** of May 2010, there was a 13.8% decrease in visitor nights on the previous year – visitor nights decreased for domestic visitors (down 21.3%) and decreased for international visitors (down 2.2%).
- For the **year** ending May 2010, there was a 0.2% decrease in visitor nights on the previous year – visitor nights decreased for domestic visitors (down 3.5%) and for increased for international visitors (up 3.7%).



• Summary Indicators

- For the **month** of May 2010, there were 56,730 visitor arrivals, down 10,075 arrivals or 15.1% on the previous year – those 56,730 visitors stayed an average 1.76 nights (up 1.6%) for a collective 99,674 visitor nights (down 13.8%).
 - Domestic nights were down 21.3% to 54,954 nights
 - International nights were down 2.2% to 44,720 nights
- For the **year** ending May 2010, there were 1,002,152 visitor arrivals, up 32,494 or 3.4% on the previous year - those 1,002,152 visitors stayed an average 1.72 nights (down 3.5%) for a collective 1,721,441 visitor nights (down 0.2%).
 - Domestic nights were down 3.5% to 904,969 nights
 - International nights were up 3.7% to 816,475 nights

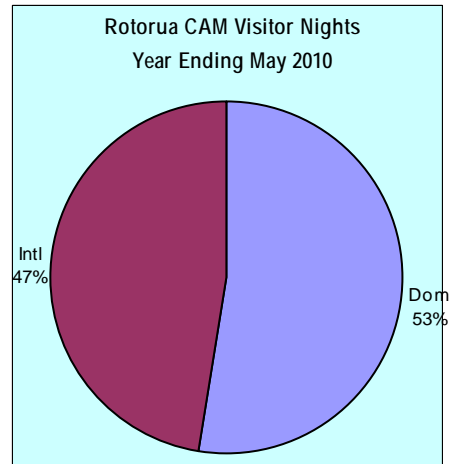
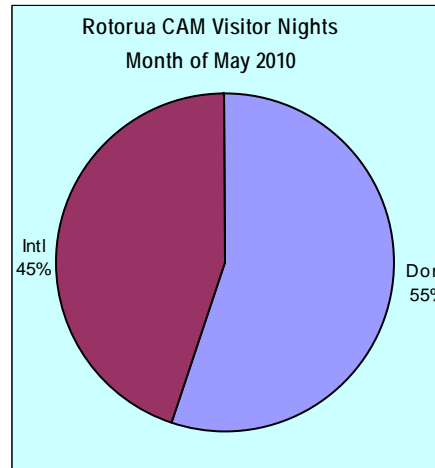
	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
Visitor Arrivals	71,707	66,805	56,730	-6.8	-15.1	1,053,372	969,658	1,002,152	-7.9	3.4
Length of Stay	1.68	1.73	1.76	3.1	1.6	1.78	1.78	1.72	-0.2	-3.5
Visitor Nights - Total	120,356	115,574	99,674	-4.0	-13.8	1,878,183	1,725,570	1,721,441	-8.1	-0.2
Domestic	71,487	69,836	54,954	-2.3	-21.3	932,277	938,016	904,969	0.6	-3.5
International	48,869	45,739	44,720	-6.4	-2.2	945,903	787,554	816,475	-16.7	3.7

Note: Domestic and international visitor nights are not always additive to total nights, because of rounding in the visitor origin data.

ROTORUA VISITOR ACTIVITY

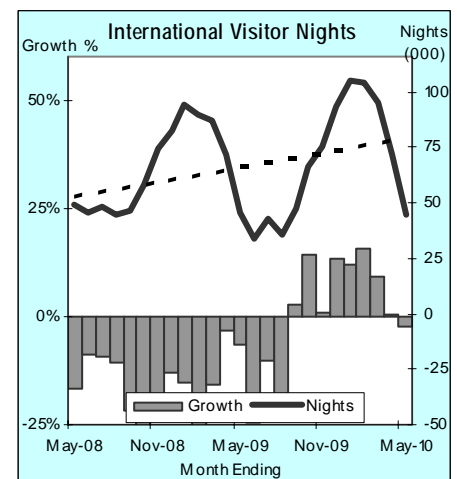
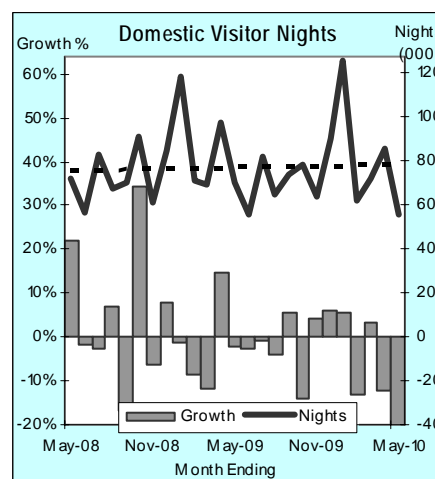
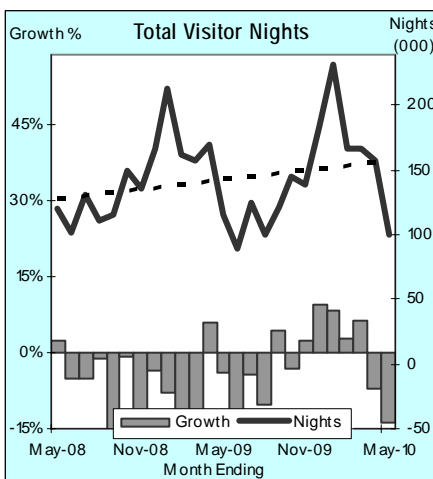
Market Segmentation

- For the **month** of May 2010, domestic visitor nights accounted for 55% of visitor nights, and international visitors for the remaining 45% of visitor nights.
- For the **year** ending May 2010, domestic visitor nights accounted for 53% of visitor nights, and international visitors for the remaining 47% of visitor nights.



Trends & Patterns

- There is a seasonal pattern to **total** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in six of the nine most recent months, following a period of decreased growth, and overall has resulted in an upward trend in visitor nights.
- There is a seasonal pattern in **domestic** visitor nights, where peaks occur in the summer season and troughs in the winter season – the graphed period shows growth alternating between increase and decline over the past 25 months, and overall has resulted in an upward trend in domestic visitor nights.
- There is a seasonal pattern in **international** visitor nights, where peaks occur in the summer season and troughs in the winter season – the graphed period shows increased growth in eight of the nine most recent months, following 18 consecutive months of decreased growth and overall has resulted in an upward trend in international visitor nights.



Data Sources

Statistics New Zealand – Commercial Accommodation Monitor

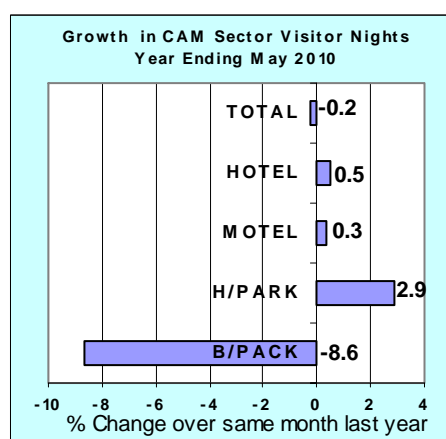
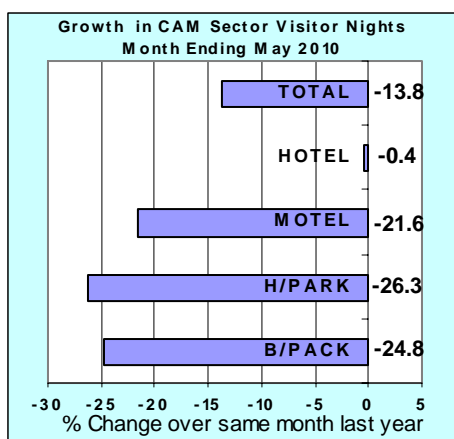
ROTORUA VISITOR ACTIVITY

Rotorua CAM Sector Analysis

CAUTION: The Statistics New Zealand Commercial Accommodation Monitor was adjusted in September 2009 as follows: the 'hosted' accommodation group was removed; and the regional boundaries were updated. Accordingly the commercial accommodation data in this section is NOT directly comparable to the same section of the Rotorua Tourism In Focus reports prior to the September 2009 survey month.

• Latest Performance

- For the **month** of May 2010, there was a 13.8% decrease in Rotorua visitor nights on the previous year – all sectors had decreased growth with the least decreased growth occurring in the hotel sector (down 0.4%) and the greatest decreased growth occurring in the holiday park sector (down 26.3%).
- For the **year** ending May 2010, there was a 0.2% decrease in Rotorua visitor nights on the previous year – the holiday park sector had the greatest growth (up 2.9%) and the backpacker sector had the least growth (down 8.6%).



• Summary Indicators

- For the **month** of May 2010, there were 99,674 visitor nights spent in Rotorua commercial accommodation, down 15,900 nights or 13.8% on the previous year.
 - Hotel nights were down 0.4% to 48,164 nights
 - Motel nights were down 21.6% to 29,229 nights
 - Holiday park nights were down 26.3% to 11,056 nights
 - Backpacker nights were down 24.8% to 11,224 nights
- For the **year** ending May 2010, there were 1,721,441 visitor nights spent in Rotorua commercial accommodation, down 4,129 nights or 0.2% on the previous year.
 - Hotel nights were up 0.5% to 716,611 nights
 - Motel nights were up 0.3% to 540,335 nights
 - Holiday park nights were up 2.9% to 278,578 nights
 - Backpacker nights were down 8.6% to 185,921 nights

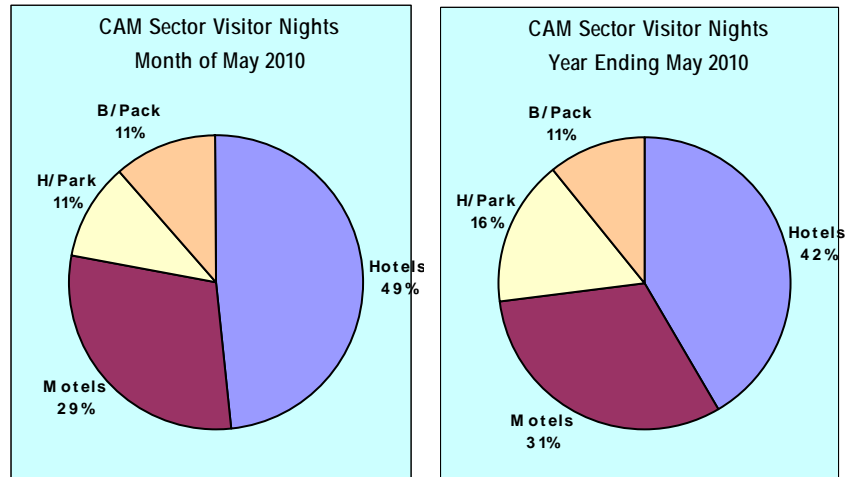
ROTORUA	Month Ended: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
Total Visitor Nights	120,356	115,574	99,674	-4.0	-13.8	1,878,183	1,725,570	1,721,441	-8.1	-0.2
Hotel	54,061	48,370	48,164	-10.5	-0.4	753,323	712,799	716,611	-5.4	0.5
Motel	36,616	37,264	29,229	1.8	-21.6	624,491	538,503	540,335	-13.8	0.3
Holiday Park	12,878	15,007	11,056	16.5	-26.3	287,969	270,760	278,578	-6.0	2.9
Backpackers	16,801	14,934	11,224	-11.1	-24.8	212,403	203,508	185,921	-4.2	-8.6

Note: Sector visitor nights are not always additive to total nights, because of rounding in the sector data.

ROTORUA VISITOR ACTIVITY

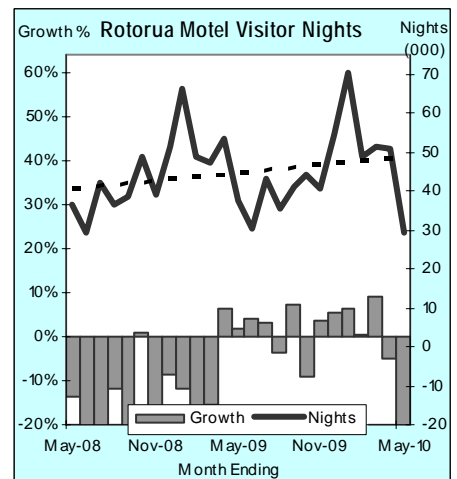
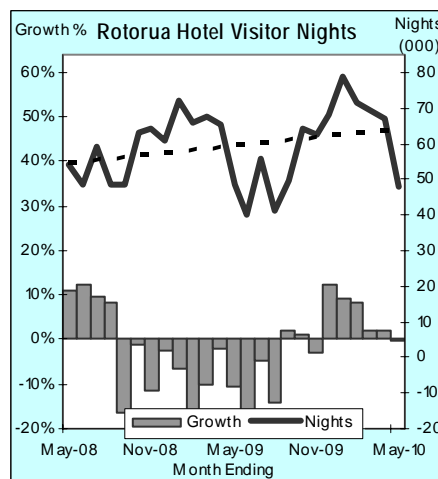
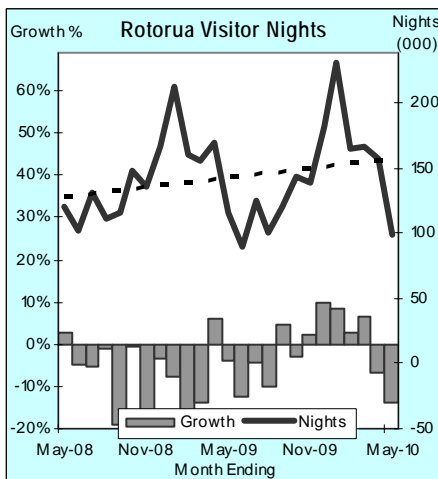
Market Segmentation

- For the **month** of May 2010, hotels accounted for 49% of Rotorua visitor nights, motels for 29%, and holiday parks and backpackers for 11% each.
- For the **year ending** May 2010, hotels accounted for 42% of Rotorua visitor nights, motels for 31%, holiday parks for 16% and backpackers for 11%.



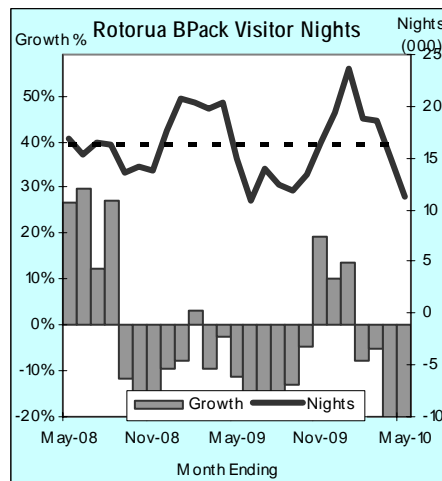
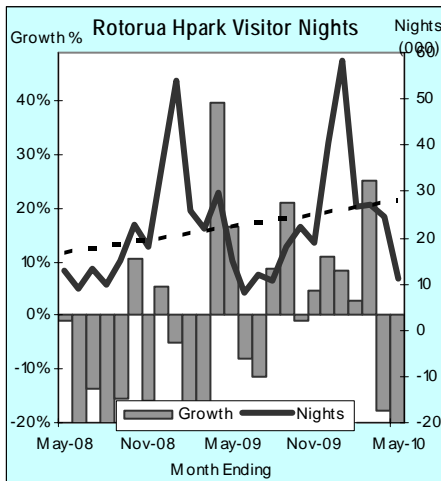
Trends & Patterns

- There is a seasonal pattern to **total** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in six of the nine most recent months, following a period of decreased growth, and overall has resulted in an upward trend in visitor nights.
- There is a seasonal pattern in Rotorua **hotel** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in seven of the nine most recent months, following a period of decreased growth and overall has resulted in an upward trend in hotel visitor nights.
- There is a seasonal pattern in Rotorua **motel** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in 10 of the 14 most recent months, following a period of decreased growth and overall has resulted in an upward trend in motel visitor nights.



ROTORUA VISITOR ACTIVITY

- There is a seasonal pattern to Rotorua **holiday park** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in nine of the 14 most recent months, following a period of decreased growth and overall has resulted in an upward trend in holiday park visitor nights.
- There is a seasonal pattern to Rotorua **backpacker** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows decreased growth in 17 of the 21 most recent months, following a period of increased growth and overall has resulted in a downward trend in backpacker visitor nights.



Visitor Night Benchmarking by Sector – Month of May 2010

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
Step 1. Enter YOUR visitor nights for May 2010					1,650
Step 2. Enter YOUR visitor nights for May 2009					1,500
Step 3. Subtract Step 2 from Step 1 .					150
Step 4. Divide Step 3 by Step 2 .					0.100
Step 5. Multiply Step 4 by 100 = Visitor Night growth					10.0%
Rotorua Avg Visitor Night growth	-0.4%	-21.6%	-26.3%	-24.8%	-21.6%
NZ Avg Visitor Night growth	3.1%	-10.9%	-14.2%	-10.2%	-10.9%

Eg. A motel that had 1650 visitor nights for month of May 2010 has had a 10.0% increase in visitor nights over the 1500 visitor nights for May 2009. The 10.0% increased growth in visitor nights at this motel is better than both the average growth in visitor nights of all Rotorua motels (-21.6%) and the average growth in visitor nights of all New Zealand motels (-10.9%).

• Data Sources

- Statistics New Zealand – Commercial Accommodation Monitor

ROTORUA VISITOR ACTIVITY

Rotorua CAM Occupancy Analysis

Stay Units refers to the units of accommodation available and occupied. In the instance of hotel and motel accommodation types a stay unit equates to the number of rooms; for backpackers it equates to the number of beds; and for holiday parks it equates to the number of sites/cabins.

Occupancy is the relationship between stay units available and stay units occupied (eg. increased occupancy is often the result of increased visitor activity, but occupancy can also increase in times of declining visitor activity when stay units available decreases at a faster rate than the decline in stay units occupied).

CAUTION: The Statistics New Zealand Commercial Accommodation Monitor was adjusted in September 2009 as follows: the 'hosted' accommodation group was removed; and the regional boundaries were updated. Accordingly the commercial accommodation data in this section is NOT directly comparable to the same section of the Rotorua Tourism In Focus reports prior to the September 2009 survey month.

Summary Indicators

- For the **month** of May 2010, there were 188,666 stay units available in Rotorua commercial accommodation, up 0.4%. Of the 188,666 available stay units, 58,644 units were occupied (down 11.8%), which resulted in a 31.1% occupancy rate.
 - Hotel occupancy was up from 48.1% to 48.2%
 - Motel occupancy was down from 41.0% to 34.4%
 - Holiday Park occupancy was down from 12.6% to 10.4%
 - Backpacker occupancy was down from 42.6% to 32.0%
- For the **year** ending May 2010, there were 2,224,602 stay units available in Rotorua commercial accommodation, up 4.2%. Of the 2,224,602 available stay units, 909,879 units were occupied (down 3.7%), which resulted in a 40.9% occupancy rate.
 - Hotel occupancy was down from 58.2% to 57.6%
 - Motel occupancy was down from 47.7% to 44.9%
 - Holiday Park occupancy was down from 20.7% to 18.2%
 - Backpacker occupancy was down from 51.4% to 44.5%

	Month Ended: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
All Accommodation										
Stay Units Available	175,553	187,891	188,666	7.0	0.4	2,112,047	2,134,908	2,224,602	1.1	4.2
Stay Units Occupied	71,280	66,510	58,644	-6.7	-11.8	980,740	945,195	909,879	-3.6	-3.7
Occupancy	40.6%	35.4%	31.1%	-12.8	-12.2	46.4%	44.3%	40.9%	-4.7	-7.6
Hotel										
Stay Units Available	57,505	57,474	57,226	-0.1	-0.4	683,022	677,230	675,224	-0.8	-0.3
Stay Units Occupied	32,429	27,647	27,575	-14.7	-0.3	397,849	394,011	389,026	-1.0	-1.3
Occupancy	56.4%	48.1%	48.2%	-14.7	0.2	58.2%	58.2%	57.6%	-0.1	-1.0
Motel										
Stay Units Available	41,726	43,245	43,369	3.6	0.3	504,368	505,125	515,770	0.2	2.1
Stay Units Occupied	18,869	17,733	14,934	-6.0	-15.8	270,646	240,801	231,769	-11.0	-3.8
Occupancy	45.2%	41.0%	34.4%	-9.3	-16.0	53.7%	47.7%	44.9%	-11.2	-5.7
Holiday Park										
Stay Units Available	45,136	53,444	55,769	18.4	4.4	549,695	584,011	650,472	6.2	11.4
Stay Units Occupied	6,081	6,747	5,787	11.0	-14.2	121,603	120,920	118,410	-0.6	-2.1
Occupancy	13.5%	12.6%	10.4%	-6.3	-17.8	22.1%	20.7%	18.2%	-6.4	-12.1
Backpackers										
Stay Units Available	31,186	33,728	32,302	8.2	-4.2	374,962	368,542	383,136	-1.7	4.0
Stay Units Occupied	13,900	14,383	10,347	3.5	-28.1	190,644	189,462	170,674	-0.6	-9.9
Occupancy	44.6%	42.6%	32.0%	-4.3	-24.9	50.8%	51.4%	44.5%	1.1	-13.3

Note: Sector units available and occupied are not always additive to total units, because of rounding in the sector data.

Occupancy Benchmarking by Sector – Month of May 2010

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
Step 1. Enter YOUR stay units <u>occupied</u> for May 2010					430
Step 2. Enter YOUR stay units <u>available</u> for May 2010					775
Step 3. Divide Step 1 by Step 2 .					0.555
Step 4. Multiply Step 3 by 100 = Occupancy Rate					55.5%
Rotorua Avg Occupancy	48.2%	34.4%	10.4%	32.0%	34.4%
NZ Avg Occupancy	46.9%	37.5%	7.6%	32.6%	37.5%

Eg. A motel that has 25 rooms/units available on the last day of the month has 775 room nights available for the month of May 2010 (ie. 25 rooms multiplied by 31 days). If 430 of the 775 available room nights were occupied during the month of May 2010, that motel has an occupancy rate of 55.5%, which is better than the average occupancy for all Rotorua motels (34.4%), and also better than the average occupancy for all New Zealand motels (37.5%).

Market Share of Occupied Stay Units by Sector – Month of May 2010

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
No. of Establishments	21	78	13	11	78
Step 1. Enter YOUR stay units <u>occupied</u> for May 2010					430
Step 2. Total Rotorua stay units <u>occupied</u> for May 2010	27,575	14,934	5,787	10,347	14,934
Step 3. Divide Step 1 by Step 2 .					0.029
Step 4. Multiply Step 3 by 100 = Market Share	%	%	%	%	2.9%
Rotorua Avg Market Share	4.8%	1.3%	7.7%	9.1%	1.3%

Eg. A motel that had 430 occupied rooms for the month of May 2010 has a 2.9% market share of the 14,934 occupied stay units in Rotorua motels, which is more than the average market share of Rotorua motels (1.3%).

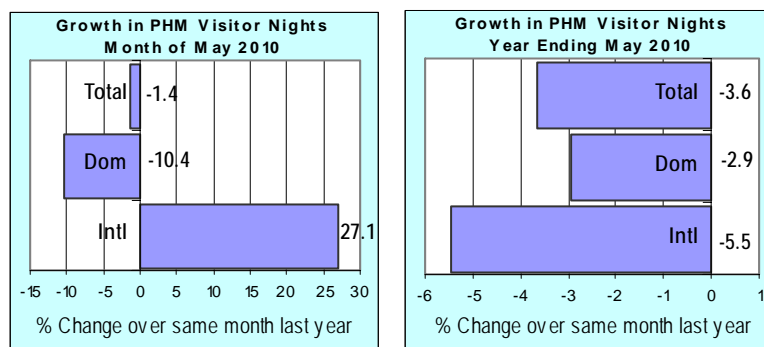
- Data Sources
 - Statistics New Zealand – Commercial Accommodation Monitor

Rotorua Private Homes Monitor

The Rotorua Private Homes Monitor is the estimated visitor activity occurring in the homes of Rotorua residents (ie. visitors staying with friends and relatives). APR Consultants contacts approximately 500 randomly selected Rotorua households each month to provide details of visitor activity occurring in their homes. About 300 of those households choose to provide data, which APR Consultants then extrapolates to the 22,000+ Rotorua households and report in the Rotorua Private Homes Monitor.

• Latest Performance

- For the **month** of May 2010, there was a 1.4% decrease in visitor nights on the previous year – visitor nights decreased for domestic visitors (down 10.4%) and increased for international visitors (up 27.1%).
- For the **year ending** May 2010, there was a 3.6% decrease in visitor nights on the previous year – visitor nights decreased for both domestic visitors (down 2.9%) and for international visitors (down 5.5%).



• Summary Indicators

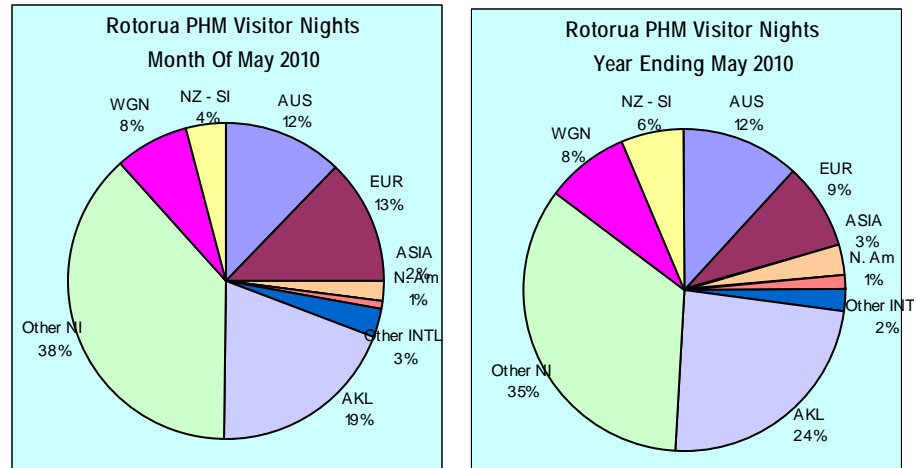
- For the **month** of May 2010, there were 23,760 visitor arrivals, up 18 arrivals or 0.1% on the previous year – those 23,760 visitors stayed an average 3.56 nights (down 1.5%) for a collective 84,568 visitor nights (down 1.4%).
 - Domestic nights were down 10.4% to 58,455 nights
 - International nights were up 27.1% to 26,113 nights
- For the **year ending** May 2010, there were 374,497 visitor arrivals, up 5,332 arrivals or 1.4% on the previous year - those 374,497 visitors stayed an average 3.83 nights (down 5.0%) for a collective 1,432,662 visitor nights (down 3.6%).
 - Domestic nights were down 2.9% to 1,043,475 nights
 - International nights were down 5.5% to 389,187 nights

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
Visitor Arrivals	27,066	23,742	23,760	-12.3	0.1	413,283	369,165	374,497	-10.7	1.4
Length of Stay	3.78	3.61	3.56	-4.4	-1.5	3.92	4.03	3.83	2.9	-5.0
Visitor Nights - Total	102,247	85,783	84,568	-16.1	-1.4	1,618,205	1,486,754	1,432,662	-8.1	-3.6
Domestic	78,911	65,238	58,455	-17.3	-10.4	1,164,370	1,075,130	1,043,475	-7.7	-2.9
International	23,336	20,545	26,113	-12.0	27.1	453,835	411,624	389,187	-9.3	-5.5

ROTORUA VISITOR ACTIVITY

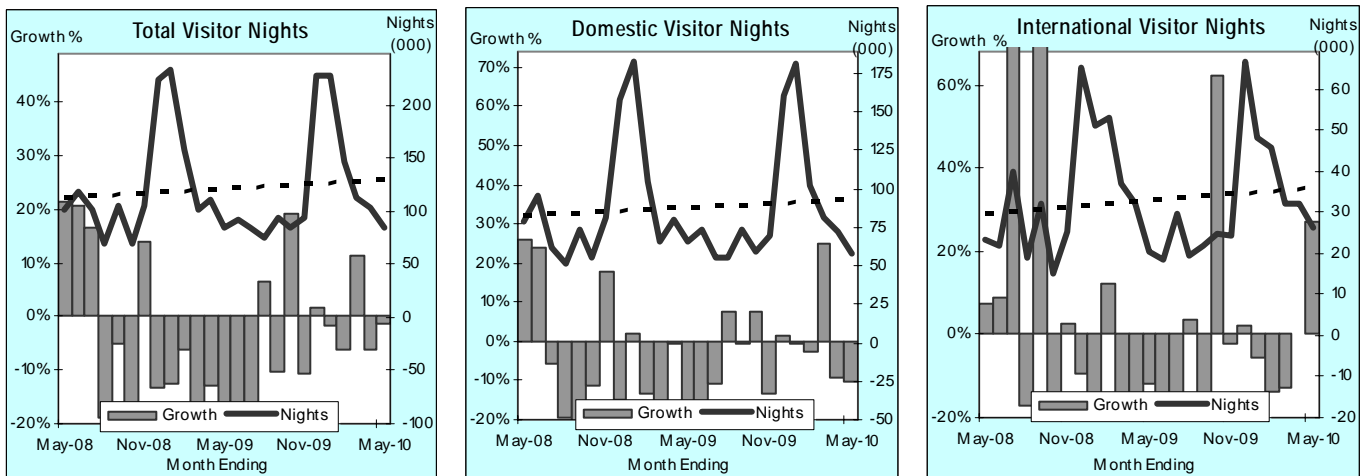
Market Segmentation

- For the **month** of May 2010, domestic visitors accounted for 69% of visitor nights, and international visitors for the remaining 31% of visitor nights.
- For the **year** ending May 2010, domestic visitors accounted for 73% of visitor nights, and international visitors for the remaining 27% of visitor nights.



Trends & Patterns

- There is a seasonal pattern to **total** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows smaller decreases in growth in the 10 most recent months, following a period of decreased growth and overall has resulted in an upward trend in visitor nights.
- There is a pattern alternating between peaks and troughs in **domestic** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows smaller decreases in growth in the ten most recent months, following a period of decreased growth and overall has resulted in an upward trend in visitor nights.
- There is a seasonal pattern in **international** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in five of the 10 most recent months, following a period of decreased growth, and overall has resulted in an upward trend in visitor nights.



Data Sources

- APR Consultants – Rotorua Private Homes Monitor

Rotorua Attraction & Activities Monitor

The Rotorua Attraction & Activities Monitor measures visitor activity occurring at 28 popular Rotorua tourism businesses. Each month these businesses submit visitor origin data to APR Consultants who then report the aggregated results in the Rotorua Attraction & Activities Monitor.

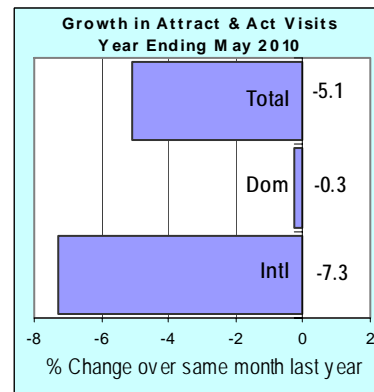
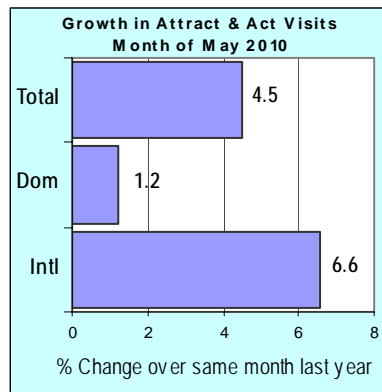
Attraction Sites: Agrodome, Buried Village, Hell's Gate, Lakeland Queen, Polynesian Spa, Rainbow Springs, Redwoods Gift Shop & Visitor Centre, Rotorua Simulator (ceased trading - proxy return), Skyline Skyrides, Tamaki Maori Village, Te Pua, Waimangu Volcanic Valley, and Waiotapu Thermal Wonderland

Activities Sites: Agroventures, K-Jet Rotorua, Mokoia Island Cruises, NZ River Jet, NZONE, Off Road NZ, Paradise Valley Ventures, Pure Cruise, Quadzone ATV Tours, River Rats Rafting, Rotorua Duck Tours, Te Urewera Treks, Volcanic Air Safaris, Wet 'n' Wild Rafting, Zorb Rotorua

CAUTION: The APR Consultants Rotorua Attraction Monitor was adjusted in August 2009 to also include activities operators and is now known as the Rotorua Attraction and Activities Monitor. Accordingly the attraction and activities visits reported in this section are NOT directly comparable to the same section of Rotorua Tourism In Focus reports prior to the August 2009 survey month.

• Latest Performance

- For the **month** of May 2010, there was a 4.5% increase in attraction and activities visits on the previous year – visits increased for both domestic visitors (up 1.2%) and for international visitors (up 6.6%).
- For the **year** ending May 2010, there was a 5.1% decrease in attraction and activities visits on the previous year – visits decreased for both domestic visitors (down 0.3%) and for international visitors (down 7.3%).



• Summary Indicators

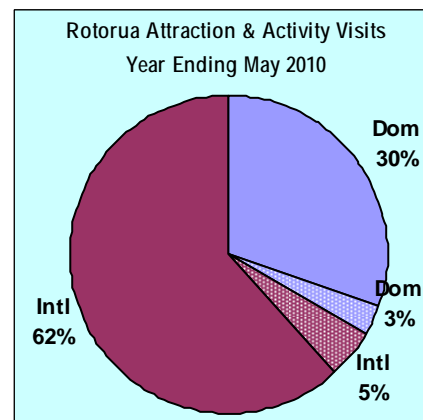
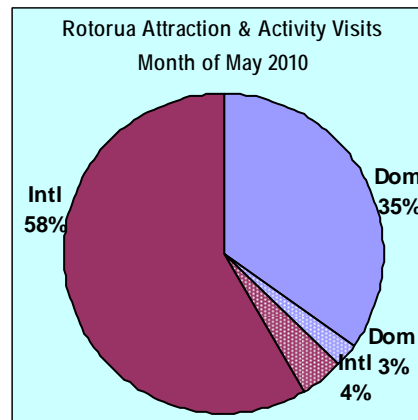
- For the **month** of May 2010, there were 111,116 attraction and activities visits, up 4796 visits or 4.5% on the previous year – domestic visits increased 1.2% to 41,441 visits, and international visits increased 6.6% to 69,675 visits.
 - Attraction visits increased 5.6% - domestic visits increased 1.4% to 38,433 visits, and international visits increased 8.4% to 64,888 visits.
 - Activities visits decreased 8.5% - domestic visits decreased 0.3% to 3,008 visits, and international visits decreased 13.0% to 4,787 visits.
- For the **year** ending May 2010, there were 1,922,948 attraction and activities visits, down 102,937 visits or 5.1% on the previous year – domestic visits decreased 0.3% to 639,413 visits, and international visits decreased 7.3% to 1,283,535 visits.
 - Attraction visits decreased 5.4% - domestic visits decreased 0.2% to 582,781 visits, and international visits decreased 7.8% to 1,183,353 visits.
 - Activities visits decreased 1.1% - domestic visits decreased 0.8% to 56,632 visits, and international visits decreased 1.3% to 100,182 visits.

	Month: May			Growth Rate (%)		Year Ended: May			Growth Rate (%)	
	2008	2009	2010	08-09	09-10	2008	2009	2010	08-09	09-10
TOTAL Visits	126,071	106,320	111,116	-15.7	4.5	2,262,320	2,025,885	1,922,948	-10.5	-5.1
Domestic	42,463	40,936	41,441	-3.6	1.2	691,254	641,073	639,413	-7.3	-0.3
International	83,608	65,384	69,675	-21.8	6.6	1,571,066	1,384,812	1,283,535	-11.9	-7.3
ATTRACTION Visits	117,646	97,798	103,321	-16.9	5.6	2,113,099	1,867,284	1,766,134	-11.6	-5.4
Domestic	39,133	37,918	38,433	-3.1	1.4	638,823	583,999	582,781	-8.6	-0.2
International	78,513	59,880	64,888	-23.7	8.4	1,474,276	1,283,285	1,183,353	-13.0	-7.8
ACTIVITIES Visits	8,425	8,522	7,795	1.2	-8.5	149,221	158,601	156,814	6.3	-1.1
Domestic	3,330	3,018	3,008	-9.4	-0.3	52,431	57,074	56,632	8.9	-0.8
International	5,095	5,504	4,787	8.0	-13.0	96,790	101,527	100,182	4.9	-1.3

ROTORUA VISITOR ACTIVITY

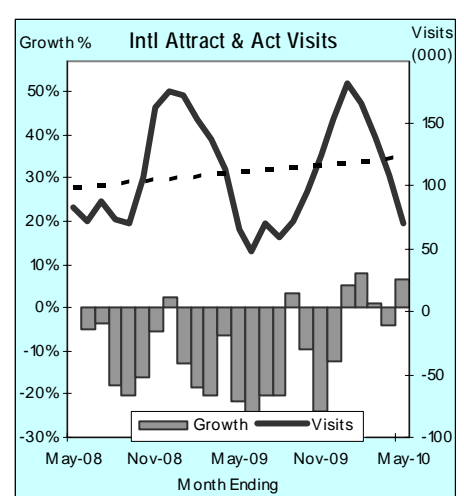
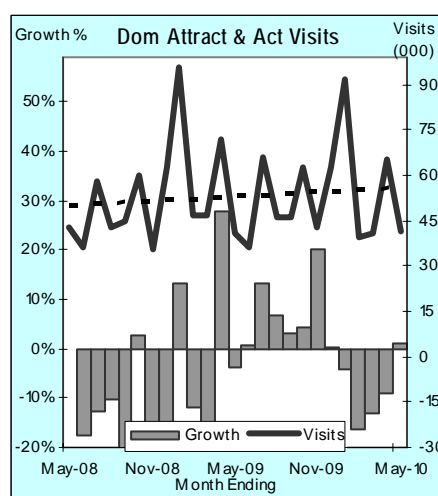
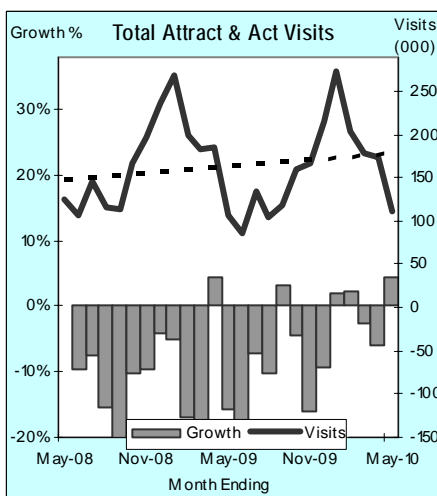
Market Segmentation

- In the **month** of May 2010, attraction operators (solid segments) accounted for 93% of visits and activities operators (shaded segments) for the remaining 7% of visits.
 - Domestic visits (blue segments) accounted for 38% of visits and international visits (red segments) for the remaining 62% of visits.
- For the **year ending** May 2010, attraction operators (solid segments) accounted for 92% of visits and activities operators (shaded segments) for the remaining 8% of visits.
 - Domestic visits (blue segments) accounted for 33% of visits and international visits (red segments) for the remaining 67% of visits.



Trends & Patterns

- There is a seasonal pattern in **total** visits, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in four of the most recent nine months, following a period of decreased growth, and overall has resulted in an upward trend in visits.
- There is a pattern alternating between peaks and troughs in **domestic** visits – the graphed period shows decreased growth in four of the most recent five months, following a period of increased growth and overall has resulted in an upward trend in domestic visits.
- There is a seasonal pattern in **international** visits, with peaks occurring in the summer season and troughs in the winter – the graphed period shows increased growth in five of the most recent nine months, following a period of decreased growth and overall has resulted in an upward trend in international visits.



ROTORUA VISITOR ACTIVITY

- Rotorua **ATTRACTION** Operator Benchmarking – Month of May 2010

	Total	Domestic	International	Example Total Visitors
Step 1. Enter YOUR visitors for May 2010				13,900
Step 2. Enter YOUR visitors for May 2009				13,500
Step 3. Subtract Step 2 from Step 1 .				400
Step 4. Divide Step 3 by Step 2 .				0.030
Step 5. Multiply Step 4 by 100 = YOUR Attraction Visit growth	%	%	%	3.0%
Rotorua Avg Attraction Visit growth	5.6%	1.4%	8.4%	5.6%

Eg. An attraction site that had 13,900 visitors for the month of May 2010 has had a 3.0% increase in total visitors over the 13,500 total visitors for May 2009. The 3.0% increased growth in visitors at this attraction site is poorer than the average growth in total attraction visits of all participating Rotorua attraction sites (+5.6%).

- Rotorua **ACTIVITIES** Operator Benchmarking – Month of May 2010

	Total	Domestic	International	Example Total Visitors
Step 1. Enter YOUR visitors for May 2010				950
Step 2. Enter YOUR visitors for May 2009				900
Step 3. Subtract Step 2 from Step 1 .				50
Step 4. Divide Step 3 by Step 2 .				0.056
Step 5. Multiply Step 4 by 100 = YOUR Activities Visit growth	%	%	%	5.6%
Rotorua Avg Activities Visit growth	-8.5%	-0.3%	-13.0%	-8.5%

Eg. An activities business that had 950 visitors for the month of May 2010 has had a 5.6% increase in total visitors over the 900 total visitors for May 2009. The 5.6% increased growth in visitors at this activities business is better than the average growth in total activities visits of all participating Rotorua activities operators (-8.5%).

- Data Sources

- APR Consultants – Rotorua Attractions & Activities Monitor

Data Sources

The data presented in this report has come from the following sources:

- Statistics New Zealand
 - External Migration
 - Commercial Accommodation Monitor (CAM)
- APR Consultants
 - Rotorua Private Homes Monitor
 - Rotorua Attractions & Activities Monitor

Most of the data used in this publication is freely available from the following websites:

- Ministry of Tourism - www.tourismresearch.govt.nz
- Statistics New Zealand - www.stats.govt.nz
- Destination Rotorua Tourism Marketing - www.rotoruaNZ.com

The Ministry of Tourism Research website is New Zealand's official portal for the dissemination of tourism sector research and information. The diagram below, reproduced directly from Ministry of Tourism Research website depicts how the core tourism dataset is structured.



Disclaimer

Although this report incorporates the most recent information available, some of the figures are provisional and therefore no liability can be accepted for the accuracy of the material contained. As the monitors from which data is drawn for this report are derived from samples there is the possibility that errors may have occurred from non responses and respondent errors - it is not possible to quantify these effects.

Any decisions based on information contained in this report are made entirely at the reader's risk. Before committing to significant business decisions, organisations/individuals are advised to seek professional assistance.