

ROTORUA
feel the spirit
Manaakitanga



Rotorua Tourism In Focus

November 2011



FOREWARD

20 January 2012

Kia Ora Industry Partners,

Nationally, the month of November 2011 showed mixed growth in visitor activity over the same month of the previous year. International visitor arrivals to New Zealand for the month of November 2011 were up 1.7% and can be mostly attributed to an increase in arrivals for the purpose of visiting friends and relatives (up 7000 arrivals or 11.6%), which were partly offset by a decline in holiday arrivals (down 3,400 arrivals or 3.0%). Visitor nights spent in commercial accommodation nationwide were down 1.5% and can be mostly attributed to reduced international visitor activity in the South Island.

There was positive growth in domestic visitor activity for Rotorua's tourism industry for the month of November 2011 over the same month of the previous year. The increase in domestic visitor activity can possibly be attributed to short-break leisure and conference travel that was displaced during the Rugby World Cup (RWC). Domestic visitor nights spent in Rotorua's commercial accommodation were up 16,600 nights or 27.4% (versus static growth for the national domestic benchmark) and domestic visits to Rotorua Attraction and Activities Monitor participants were up 4,600 visits or 11.9%.

There was negative growth in international visitor activity both nationally and for Rotorua's accommodation sector for the month of November 2011 over the same month of the previous year. The decline in international visitor nights spent in commercial accommodation has resumed the same pattern of decline as occurred following the Christchurch earthquake in February and prior to the RWC. International visitor nights spent in Rotorua's commercial accommodation were down 14,000 nights or 16.5% (versus -3.3% national international benchmark), however international visits to Rotorua Attraction and Activities Monitor participants were up 5,600 visits or 3.7%.

Overall, Rotorua had an increase of 2,600 nights or 1.8% spent in commercial accommodation (versus -1.5% national benchmark) and an increase of 10,200 visits or 5.4% to Attraction and Activities Monitor participants for the month of November 2011 over the same month of the previous year.

I invite you to read on for detailed information on Rotorua's visitor activity for the month of November 2011.

Kind regards



Gina George
Tourism Insight Analyst
Destination Rotorua Marketing
Ph. +64 7 351 7109
Email gina@rotoruaNZ.com

Liability Disclaimer While all care and diligence has been used in processing, analysing, and extracting data and information in this report, Destination Rotorua Marketing and Rotorua District Council gives no warranty it is error free and will not be liable for any loss or damage suffered by the use directly, or indirectly, of the information in this report. 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.

Contents

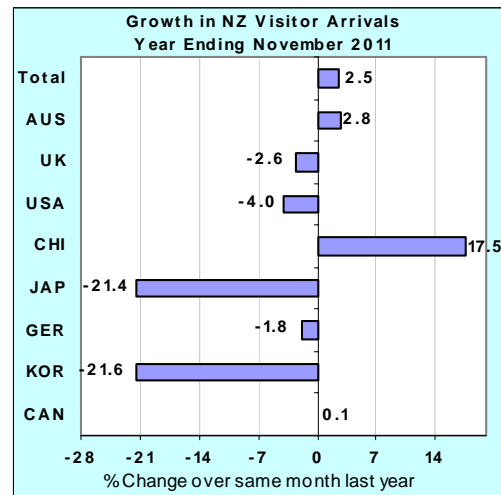
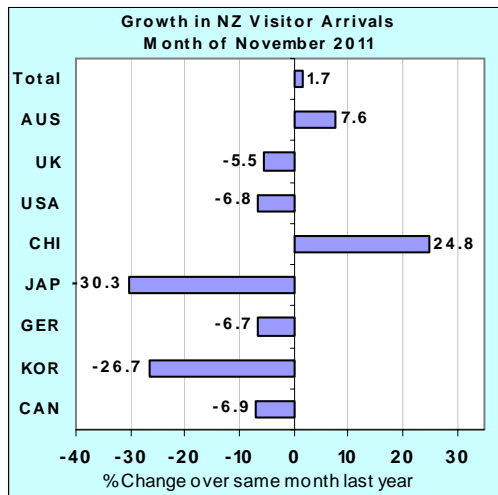
Foreward	1	ROTORUA VISITOR ACTIVITY	
NEW ZEALAND VISITOR ACTIVITY		• Rotorua Commercial Accommodation Monitor	
• International Visitor Arrivals	2	Key Performance Indicators	17
• Resident Short-Term Departures	5	Sector Analysis	19
• NZ Commercial Accommodation		Occupancy Analysis	22
Visitor Night Benchmarking	8	• Rotorua Private Homes Monitor	24
Domestic Visitor Night Benchmarking	11	• Rotorua Attraction & Activities Monitor	26
International Visitor Night Benchmarking	14	Data Sources and Liability 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 November 2011, there was a 1.7% increase in visitor arrivals to New Zealand on the previous year – the greatest growth in key markets was from China (up 24.8%) and the least growth was from Japan (down 30.3%).
- For the **year** ending November 2011, there was a 2.5% increase in visitor arrivals to New Zealand on the previous year – the greatest growth in key markets was from China (up 17.5%) and the least growth was from Korea (down 21.6%).



• Summary Indicators

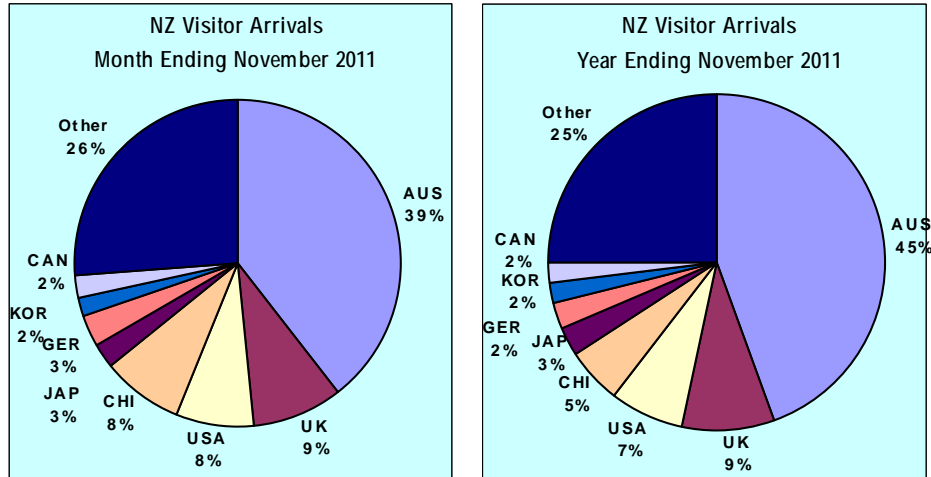
- For the **month** of November 2011, there were 230,292 visitor arrivals to New Zealand, up 3,837 arrivals or 1.7% on the previous year – visitor arrivals from: Australia up 7.6% to 91,056 arrivals, UK down 5.5% to 20,000 arrivals, USA down 6.8% to 17,856 arrivals, China up 24.8% to 18,560 arrivals, Japan down 30.3% to 5,840 arrivals, Germany down 6.7% to 7,488 arrivals, Korea down 26.7% to 4,528 arrivals, and Canada down 6.9% to 4,704 arrivals.
- For the **year** ending November 2011, there were 2,582,935 visitor arrivals to New Zealand, up 62,210 or 2.5% on the previous year - visitor arrivals from: Australia up 2.8% to 1,146,273 arrivals, UK down 2.6% to 231,764 arrivals, USA down 4.0% to 184,228 arrivals, China up 17.5% to 141,289 arrivals, Japan down 21.4% to 69,417 arrivals, Germany down 1.8% to 64,020 arrivals, Korea down 21.6% to 52,629 arrivals, and Canada up 0.1% to 49,129 arrivals.

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
Visitor Arrivals - Total	219,939	226,455	230,292	3.0	1.7	2,439,252	2,520,725	2,582,935	3.3	2.5
Australia	84,502	84,625	91,056	0.1	7.6	1,068,667	1,115,408	1,146,273	4.4	2.8
UK	24,518	21,175	20,000	-13.6	-5.5	258,060	237,909	231,764	-7.8	-2.6
USA	18,768	19,150	17,856	2.0	-6.8	195,038	191,902	184,228	-1.6	-4.0
China	11,063	14,875	18,560	34.5	24.8	104,527	120,222	141,289	15.0	17.5
Japan	8,027	8,375	5,840	4.3	-30.3	78,885	88,324	69,417	12.0	-21.4
Germany	8,096	8,025	7,488	-0.9	-6.7	63,997	65,221	64,020	1.9	-1.8
Korea	4,370	6,175	4,528	41.3	-26.7	52,462	67,094	52,629	27.9	-21.6
Canada	4,922	5,050	4,704	2.6	-6.9	48,548	49,082	49,129	1.1	0.1

NEW ZEALAND VISITOR ACTIVITY

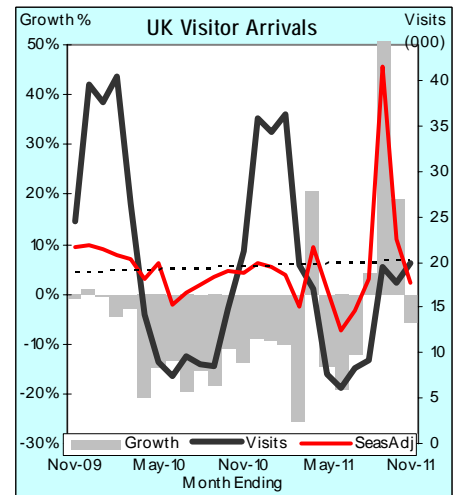
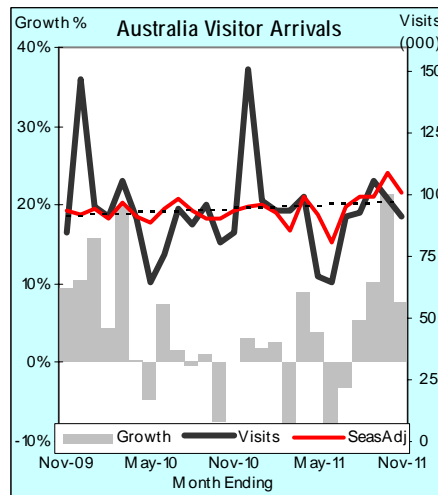
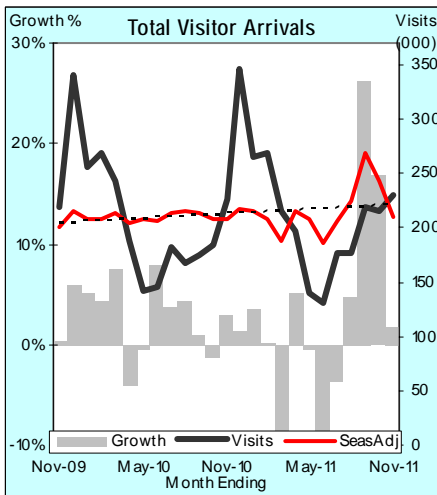
Market Segmentation

- For the **month** of November 2011, arrivals from Australia accounted for 39% of visitor arrivals to New Zealand, UK for 9%, USA and China for 8% each, Japan and Germany for 3% each, Korea and Canada for 2% each, and other countries collectively for the remaining 26%.
- For the **year** ending November 2011, arrivals from Australia accounted for 45% of visitor arrivals to New Zealand, UK for 9%, USA for 7%, China for 5%, Japan for 3%, Germany, Korea and Canada for 2% each, and other countries collectively for the remaining 25%.



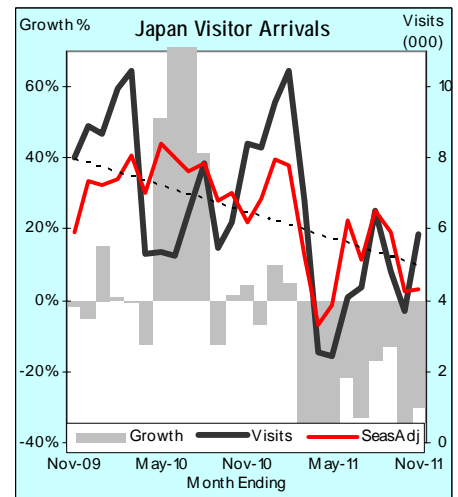
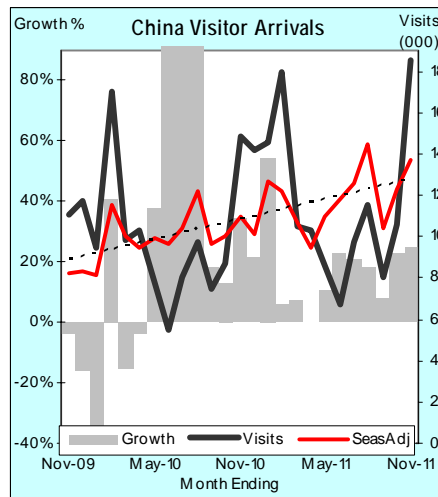
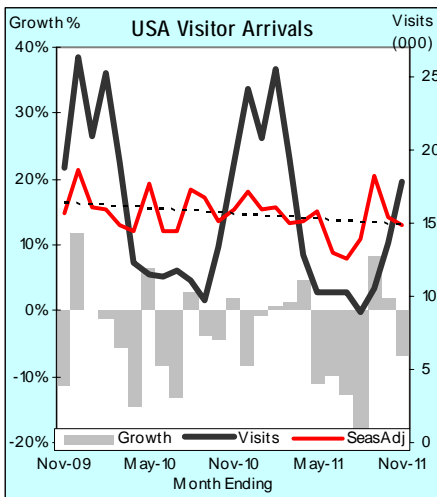
Trends & Patterns

- There is a seasonal pattern in **total** visitor arrivals into New Zealand, with peaks occurring in the summer season and troughs in the winter – the graphed period includes RWC related growth in the three of the most recent four months, following a short period of negative growth, and overall has resulted in an upward trend in seasonally adjusted visitor arrivals.
- There is a pattern in visitor arrivals from **Australia** coinciding with school holiday periods with the steepest peaks during the summer season – the graphed period includes RWC related growth in the three of the most recent four months, following a period of mixed growth for the 15 previous months, and overall has resulted in an upward trend in seasonally adjusted visitor arrivals.
- There is a seasonal pattern in visitor arrivals from **United Kingdom**, with peaks occurring in the summer season and troughs in the winter – the graphed period includes RWC related growth in three of the most recent four months, following almost exclusively negative growth in the previous graphed months, and overall has resulted in an upward trend in seasonally adjusted visitor arrivals.

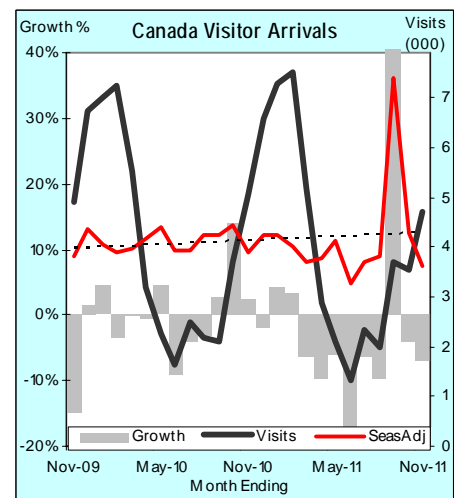
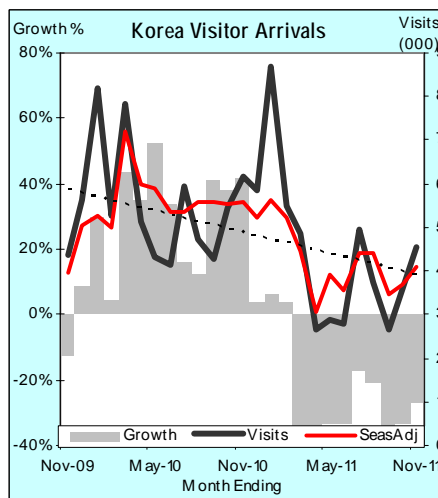
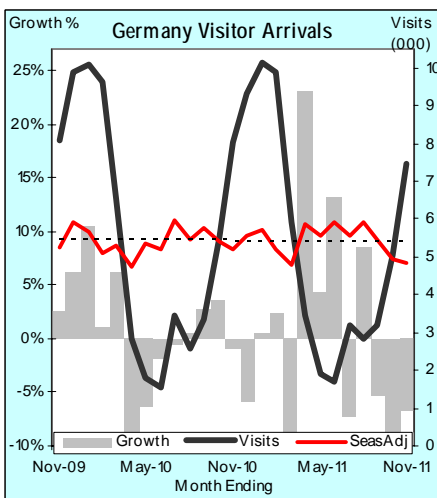


NEW ZEALAND VISITOR ACTIVITY

- There is a seasonal pattern in visitor arrivals from **USA**, 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 negative growth in 15 of the 25 graphed months, and overall has resulted in a downward trend in seasonally adjusted visitor arrivals.
- There is a seasonal pattern in visitor arrivals from **China**, with peaks occurring in the summer season and troughs in the winter – the graphed period shows the nineteenth consecutive month of positive growth, following a period of mostly negative growth, and overall has resulted in an upward trend in seasonally adjusted visitor arrivals.
- There is a seasonal pattern in visitor arrivals from **Japan**, with peaks occurring in the summer season and troughs in the winter – the graphed period shows the ninth consecutive month of negative growth, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted visitor arrivals.



- There is a seasonal pattern in visitor arrivals from **Germany**, with peaks occurring in the summer season and troughs in the winter – the graphed period shows negative growth in four of the most recent five months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted visitor arrivals.
- There is a seasonal pattern in visitor arrivals from **Korea**, 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 ninth consecutive month of negative growth, following a 15 month period of positive growth, and overall has resulted in a downward trend in seasonally adjusted visitor arrivals.
- There is a seasonal pattern in visitor arrivals from **Canada**, with peaks occurring in the summer season and troughs in the winter – the graphed period shows negative growth in eight of the most recent nine months, following a period of mixed growth, and overall has resulted in an upward trend in seasonally adjusted visitor arrivals.



• Data Sources

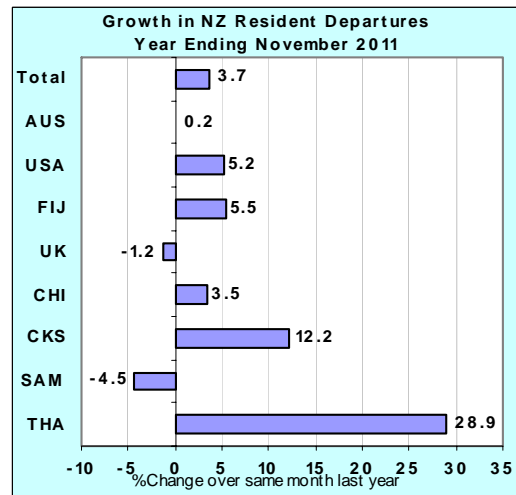
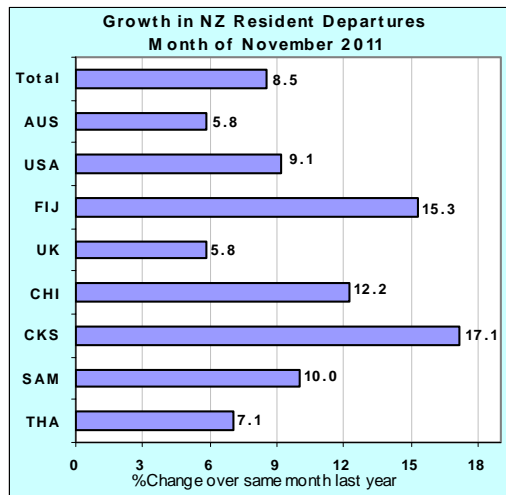
- Statistics New Zealand – External Migration, Short-term Overseas Visitor Arrivals

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 November 2011, there was an 8.5% increase in resident short-term departures from New Zealand on the previous year – the greatest growth in key destinations was to Cook Islands (up 17.1%) and the least growth was to Australia and UK (each up 5.8%).
- For the **year** ending November 2011, there was a 3.7% increase in resident short-term departures from New Zealand on the previous year – the greatest growth in key destinations was to Thailand (up 28.9%) and the least growth was to Samoa (down 4.5%).



• Summary Indicators

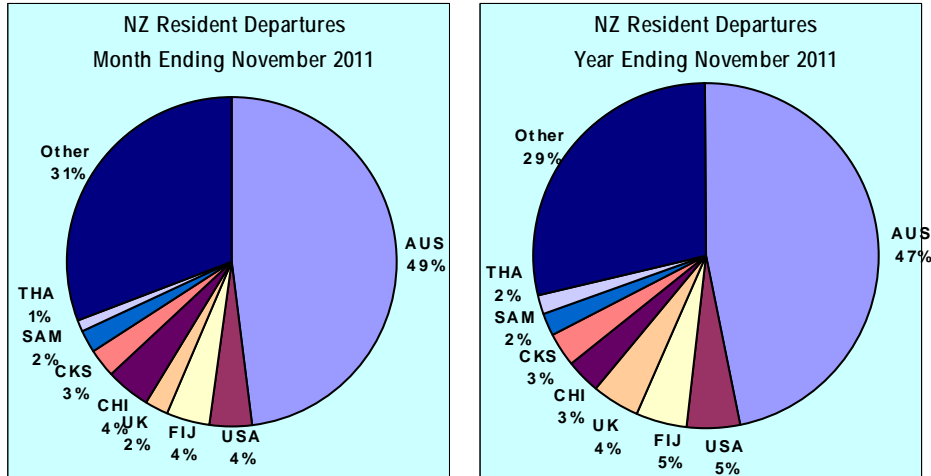
- For the **month** of November 2011, there were 174,555 resident short-term departures from New Zealand, up 13,708 departures or 8.5% on the previous year – resident departures to: Australia up 5.8% to 84,100 departures, USA up 9.1% to 7,280 departures, Fiji up 15.3% to 6,920 departures, UK up 5.8% to 4,020 departures, China up 12.2% to 7,780 departures, Cook Islands up 17.1% to 4,960 departures, Samoa up 10.0% to 3,540 departures and Thailand up 7.1% to 2,360 departures.
- For the **year** ending November 2011, there were 2,079,733 resident short-term departures from New Zealand, up 74,858 or 3.7% on the previous year - resident departures to: Australia up 0.2% to 971,051 departures, USA up 5.2% to 102,866 departures, Fiji up 5.5% to 101,240 departures, UK down 1.2% to 91,568 departures, China up 3.5% to 66,879 departures, Cook Islands up 12.2% to 66,831 departures, Samoa down 4.5% to 42,342 departures and Thailand up 28.9% to 36,013 departures.

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
Resident Deps - Total	158,441	160,847	174,555	1.5	8.5	1,921,103	2,004,875	2,079,733	4.4	3.7
Australia	76,518	79,460	84,100	3.8	5.8	942,572	969,374	971,051	2.8	0.2
USA	6,291	6,670	7,280	6.0	9.1	88,515	97,760	102,866	10.4	5.2
Fiji	6,345	6,003	6,920	-5.4	15.3	91,477	96,000	101,240	4.9	5.5
UK	3,510	3,799	4,020	8.2	5.8	87,180	92,673	91,568	6.3	-1.2
China	7,155	6,931	7,780	-3.1	12.2	55,948	64,612	66,879	15.5	3.5
Cook Islands	3,591	4,234	4,960	17.9	17.1	55,727	59,555	66,831	6.9	12.2
Samoa	3,456	3,219	3,540	-6.9	10.0	41,619	44,329	42,342	6.5	-4.5
Thailand	2,619	2,204	2,360	-15.8	7.1	30,216	27,937	36,013	-7.5	28.9

NEW ZEALAND VISITOR ACTIVITY

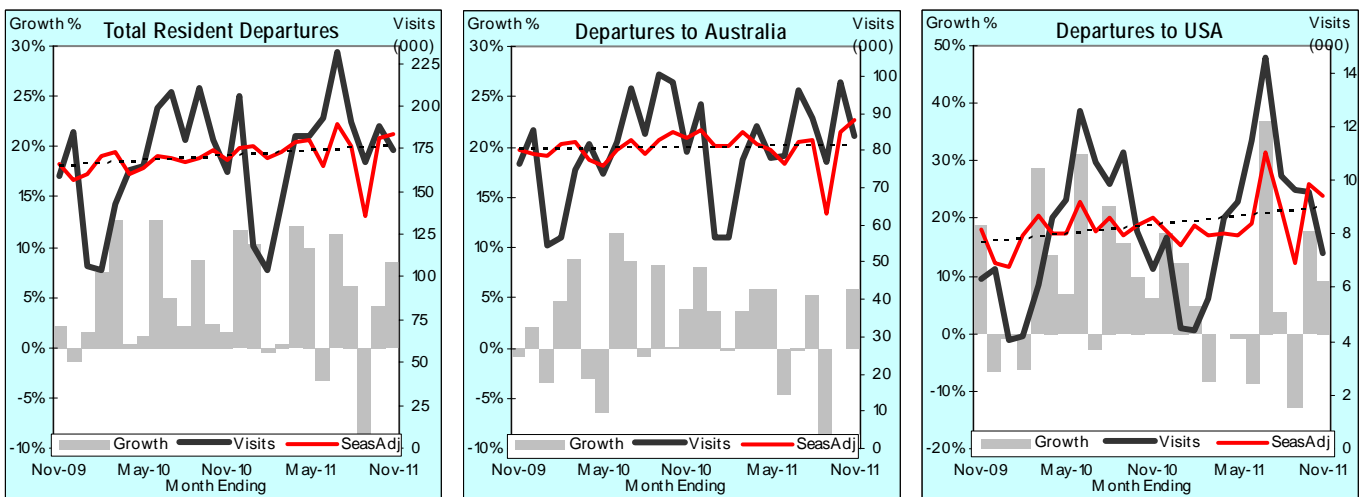
Market Segmentation

- For the **month** of November 2011, departures for Australia accounted for 49% of resident departures from New Zealand, USA, Fiji and China for 4% each, Cook Islands for 3%, UK and Samoa for 2% each, Thailand for 1%, and other countries collectively for the remaining 31%.
- For the **year** ending November 2011, departures for Australia accounted for 47% of resident departures from New Zealand, USA and Fiji for 5% each, UK for 4%, China and Cook Islands for 3% each, Samoa and Thailand for 2% each, and other countries collectively for the remaining 29%.



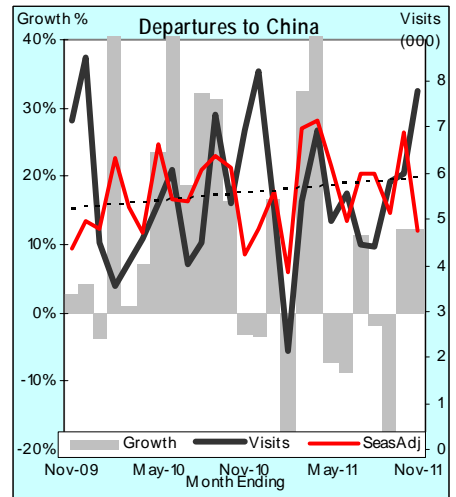
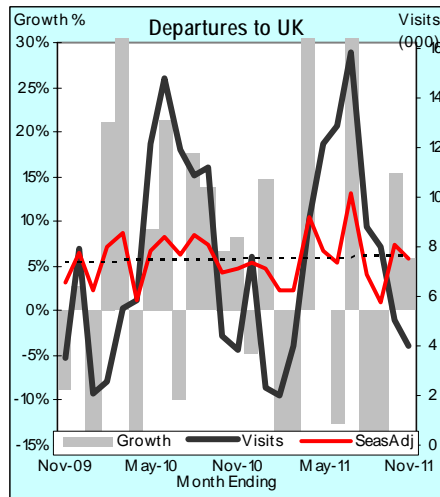
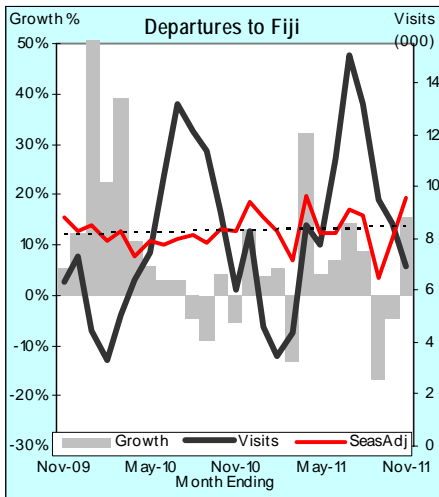
Trends & Patterns

- There is a pattern in **total** 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 positive growth in 21 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in four of the six most recent months, following a period of mostly positive growth, and overall has resulted in an upward trend in seasonally adjusted resident departures.
- 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 positive growth in 17 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted resident departures.

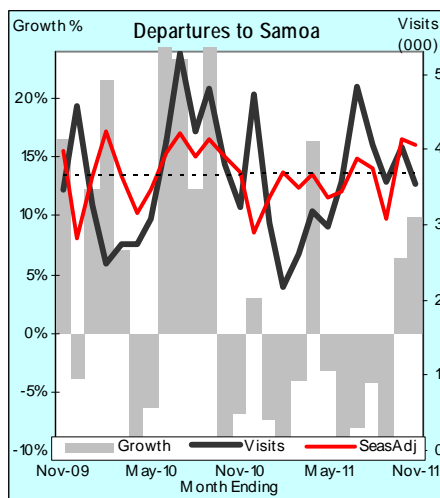


NEW ZEALAND VISITOR ACTIVITY

- 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 positive growth in 19 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in 14 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted resident departures.
- There is a pattern in resident departures from New Zealand to **China** coinciding with the end of year school holidays which is possibly associated with New Zealand resident Chinese students visiting family in China – the graphed period shows positive growth in 17 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in 21 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in 10 of the most recent 14 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 positive growth in 17 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted resident departures.



• Data Sources

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

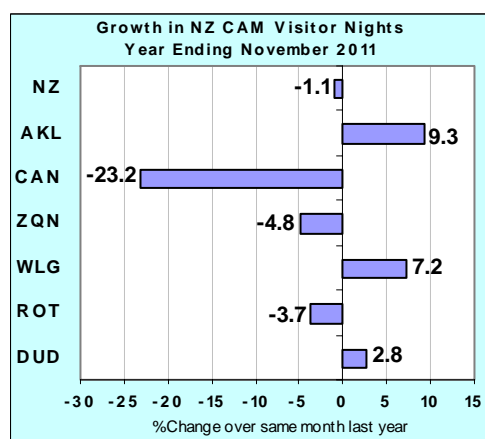
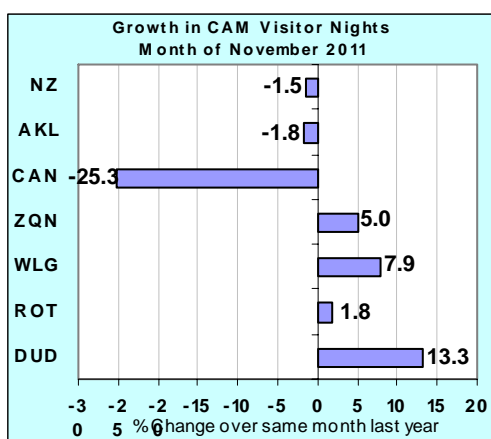
NZ Commercial Accommodation Monitor (CAM)

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.

NZ CAM Visitor Night Benchmarking – Top 6 Regional Tourism Organisations

• Latest Performance

- For the **month** of November 2011, there was a 1.5% decrease in visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Dunedin (up 13.3%) and the least growth was in Canterbury (down 25.3%).
- For the **year** ending November 2011, there was a 1.1% decrease in visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Auckland (up 9.3%) and the least growth was in Canterbury (down 23.2%).



• Summary Indicators

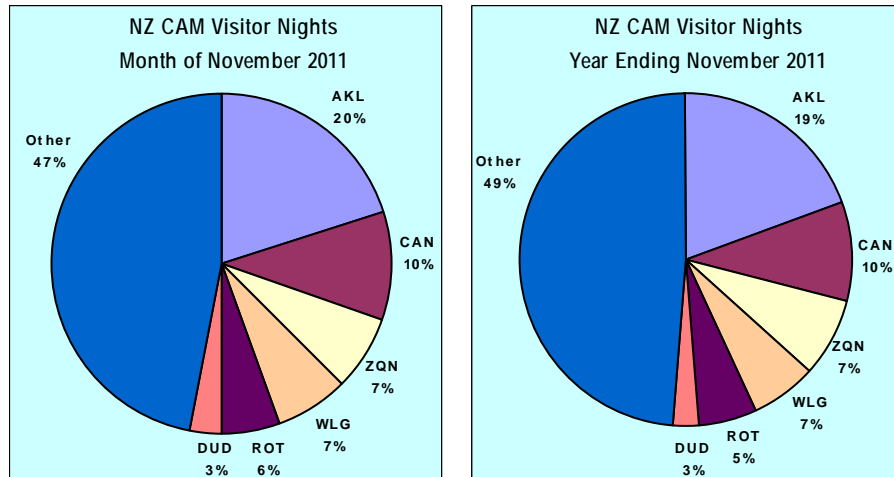
- For the **month** of November 2011, there were 2,662,602 visitor nights nationwide, down 40,182 nights or 1.5% on the previous year – visitor nights spent in Auckland down 1.8% to 536,047 nights, Canterbury down 25.3% to 269,582 nights, Queenstown up 5.0% to 193,977 nights, Wellington up 7.9% to 187,076 nights, Rotorua up 1.8% to 147,812 nights, and Dunedin up 13.3% to 79,379 nights.
- For the **year** ending November 2011, there were 31,973,154 visitor nights nationwide, down 350,136 nights or 1.1% on the previous year – visitor nights spent in Auckland up 9.3% to 6,196,790 nights, Canterbury down 23.2% to 3,094,233 nights, Queenstown down 4.8% to 2,388,786 nights, Wellington up 7.2% to 2,114,541 nights, Rotorua down 3.7% to 1,709,282 nights, and Dunedin up 2.8% to 866,827 nights.

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
NZ Visitor Nights	2,650,414	2,702,784	2,662,602	2.0	-1.5	31,876,373	32,323,290	31,973,154	1.4	-1.1
Auckland	488,085	545,849	536,047	11.8	-1.8	5,443,933	5,669,091	6,196,790	4.1	9.3
Canterbury	366,408	361,006	269,582	-1.5	-25.3	3,993,155	4,026,908	3,094,233	0.8	-23.2
Queenstown	192,166	184,673	193,977	-3.9	5.0	2,319,736	2,508,485	2,388,786	8.1	-4.8
Wellington	179,653	173,449	187,076	-3.5	7.9	1,981,088	1,972,588	2,114,541	-0.4	7.2
Rotorua	138,662	145,234	147,812	4.7	1.8	1,700,003	1,774,353	1,709,282	4.4	-3.7
Dunedin	73,417	70,084	79,379	-4.5	13.3	864,841	843,587	866,827	-2.5	2.8

NEW ZEALAND VISITOR ACTIVITY

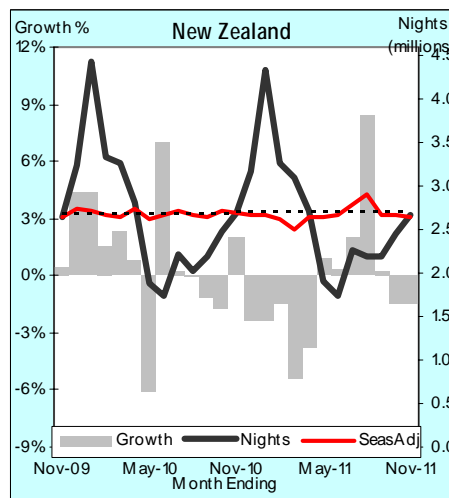
- **Market Share**

- For the **month** of November 2011, Auckland visitor nights accounted for 20% of nights, Canterbury for 10%, Queenstown and Wellington for 7% each, Rotorua for 6%, Dunedin for 3% and the other RTOs collectively for the remaining 47%.
- For the **year** ending November 2011, Auckland visitor nights accounted for 19% of nights, Canterbury for 10%, Queenstown and Wellington for 7% each, Rotorua for 5%, Dunedin for 3% and the other RTOs collectively for the remaining 49%.



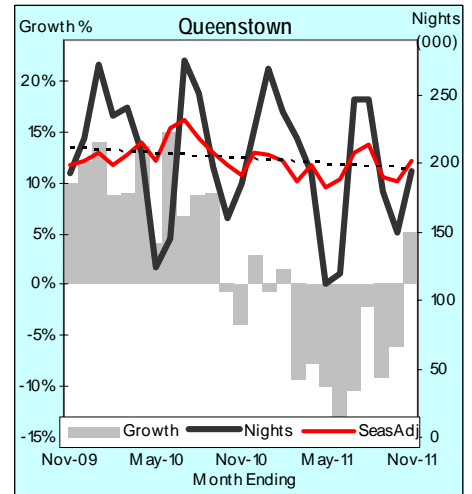
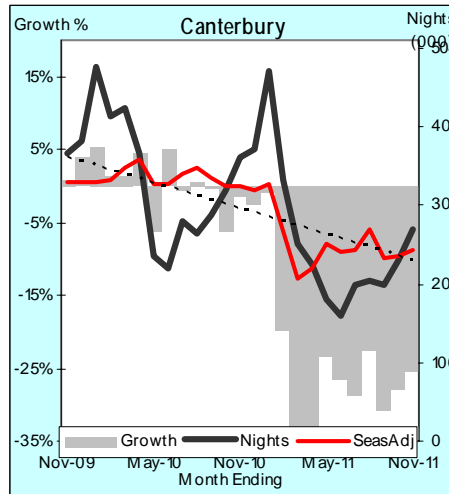
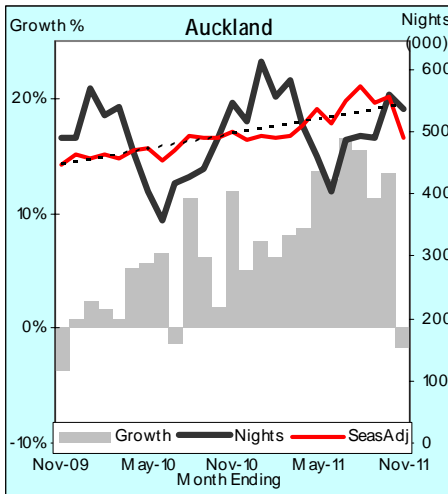
- **Trends & Patterns**

- 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 negative growth in nine of the most recent 15 months, following a period of positive growth, and overall has resulted in a downward trend in seasonally adjusted visitor nights.

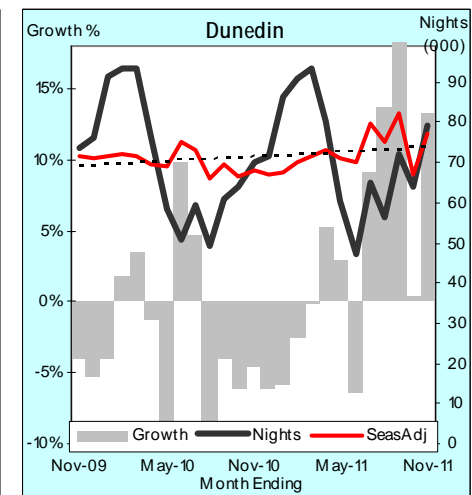
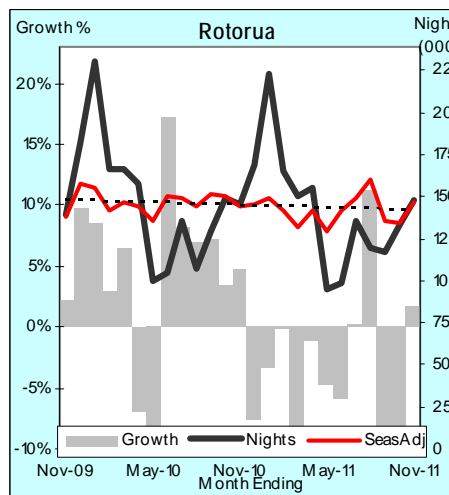
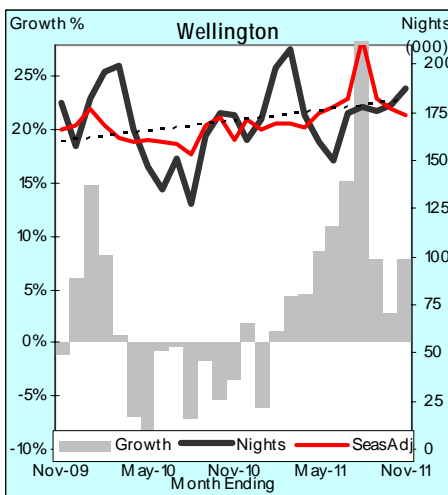


NEW ZEALAND VISITOR ACTIVITY

- 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 positive growth in 22 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in 17 of the most recent 19 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 negative growth in 11 of the most recent 14 months, following a period of positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 the tenth consecutive month of positive growth following a period of mostly negative growth, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in nine of the most recent 12 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 positive growth in eight of the most recent nine months, following a period of mostly negative growth, and overall has resulted in an upward trend in seasonally adjusted visitor nights.



• Data Sources

Statistics New Zealand – Commercial Accommodation Monitor

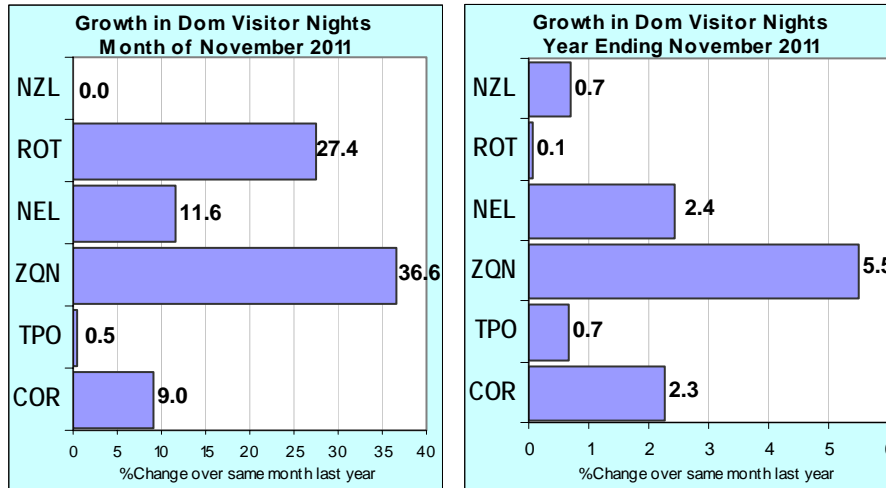
NEW ZEALAND VISITOR ACTIVITY

NZ CAM Domestic Visitor Night Benchmarking – Resort Regional Tourism Organisations

As the Rotorua Tourism in Focus report is Rotorua specific and Rotorua is a holiday resort destination only a selection of those regional tourism organisations that are also holiday resort areas have been included in this analysis.

• Latest Performance

- For the **month** of November 2011, there was static growth in domestic visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Queenstown (up 36.6%) and the least growth was in Taupo (up 0.5%).
- For the **year** ending November 2011, there was a 0.7% increase in domestic visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Queenstown (up 5.5%) and the least growth was in Rotorua (up 0.1%).



• Summary Indicators

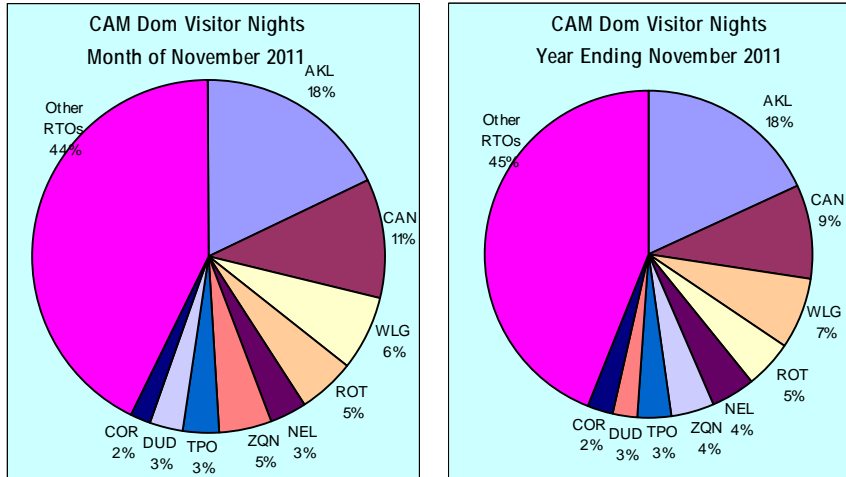
- For the **month** of November 2011, there were 1,467,037 domestic visitor nights nationwide, up 651 nights or 0.0% on the previous year – visitor nights spent in Rotorua up 27.4% to 77,093 nights, Nelson up 11.6% to 50,674 nights, Queenstown up 36.6% to 68,232 nights, Taupo up 0.5% to 51,278 nights and Coromandel up 9.0% to 27,220 nights.
- For the **year** ending November 2011, there were 18,958,768 domestic visitor nights nationwide, up 134,821 nights or 0.7% on the previous year – visitor nights spent in Rotorua up 0.1% to 930,344 nights, Nelson up 2.4% to 807,466 nights, Queenstown up 5.5% to 791,123 nights, Taupo up 0.7% to 650,518 nights and Coromandel up 2.3% to 446,109 nights.

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
NZ Dom Visitor Nights	1,375,034	1,466,386	1,467,037	6.6	0.0	18,687,668	18,823,947	18,958,768	0.7	0.7
Rotorua	63,545	60,519	77,093	-4.8	27.4	926,940	929,829	930,344	0.3	0.1
Nelson	44,881	45,412	50,674	1.2	11.6	779,306	788,217	807,466	1.1	2.4
Queenstown	53,601	49,942	68,232	-6.8	36.6	755,166	749,864	791,123	-0.7	5.5
Taupo	45,659	51,029	51,278	11.8	0.5	652,427	646,203	650,518	-1.0	0.7
Coromandel	25,203	24,966	27,220	-0.9	9.0	426,605	436,215	446,109	2.3	2.3

NEW ZEALAND VISITOR ACTIVITY

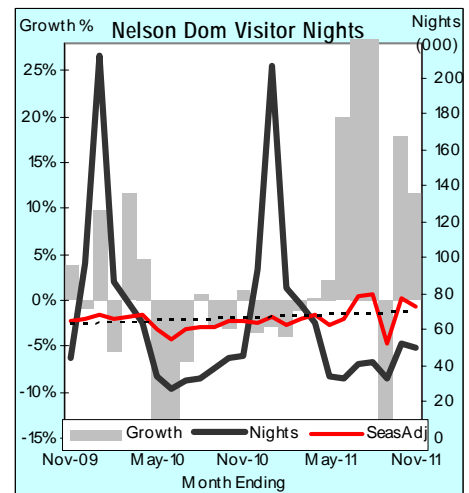
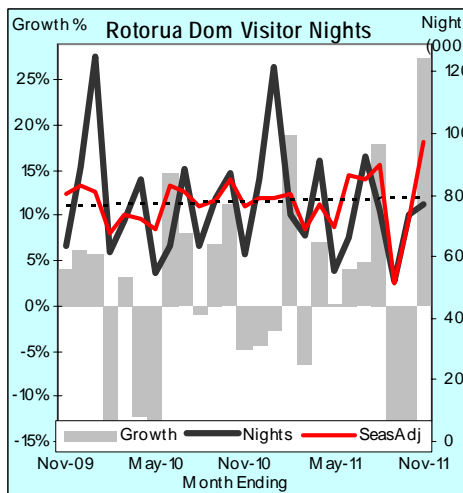
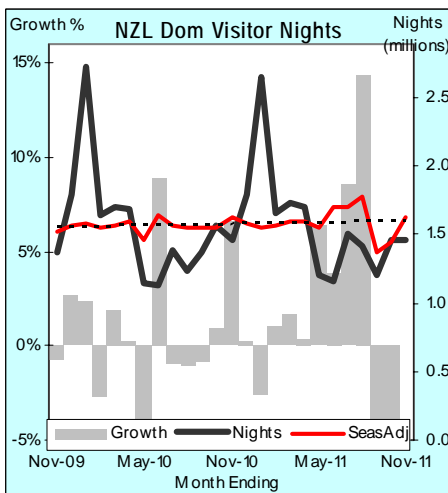
- **Market Share**

- For the **month** of November 2011, Auckland accounted for 18% of domestic visitor nights, Canterbury for 11%, Wellington for 6%, Rotorua and Queenstown for 5% each, Nelson, Taupo and Dunedin for 3% each, Coromandel for 2%, and the other RTOs collectively for the remaining 44%.
- For the **year** ending November 2011, Auckland accounted for 18% of domestic visitor nights, Canterbury for 9%, 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 45%.



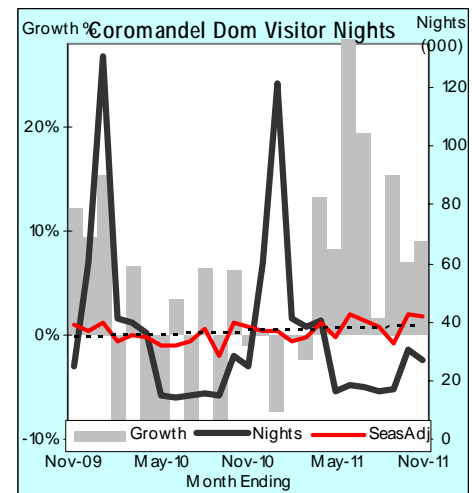
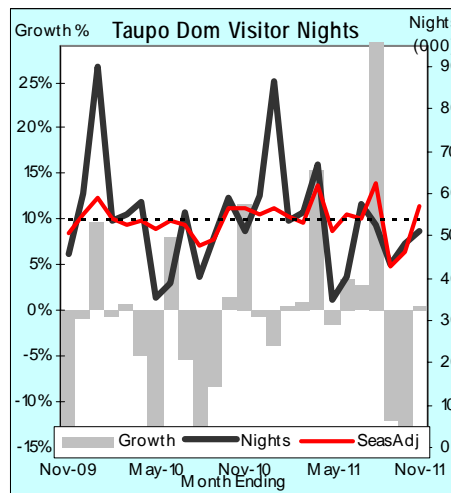
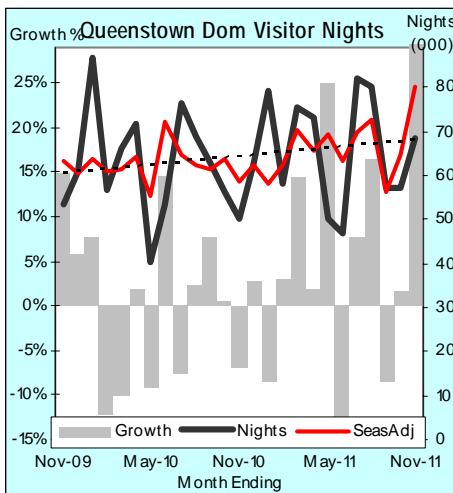
- **Trends & Patterns**

- 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 positive growth in 11 of the most recent 14 months, following a period of mixed growth, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in seven of the most recent 10 months, following a period of mixed growth, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in seven of the most recent eight months, following a period of negative growth, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in eight of the most recent 10 months, following a period of mixed growth, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in seven of the most recent 10 months, following a period of negative growth, and overall has resulted in a downward trend in seasonally adjusted 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 the eighth consecutive month of positive growth, following a period of negative growth, and overall has resulted in an upward trend in seasonally adjusted domestic visitor nights.



DOMESTIC Visitor Night Growth Benchmarking – Month of November 2011

	All NZ	Rotorua	Your Biz	Example
Step 1. Enter YOUR domestic visitor nights for November 2011	1,467,037	77,093		550
Step 2. Enter YOUR domestic visitor nights for November 2010	1,466,386	60,519		500
Step 3. Subtract Step 2 from Step 1 .	651	16,574		50
Step 4. Divide Step 3 by Step 2 .	0.000	0.274		0.100
Step 5. Multiply Step 4 by 100 = Domestic Visitor Night growth	0.0%	27.4%	%	10.0%

Fig. An accommodation provider that had 550 domestic visitor nights for month of November 2011 had a 10.0% increase in domestic visitor nights over the 500 domestic visitor nights for November 2010. The 10.0% positive growth in domestic visitor nights at this accommodation provider was poorer than the average growth in domestic visitor nights of all Rotorua accommodation providers (+27.4%), but better than the average growth in domestic visitor nights of all New Zealand accommodation providers (0.0%).

- **Data Sources**

- Statistics New Zealand – Commercial Accommodation Monitor

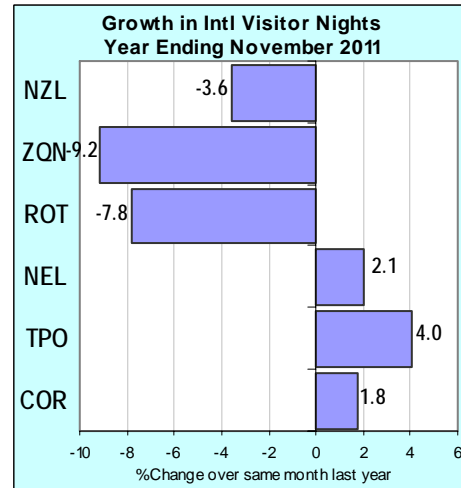
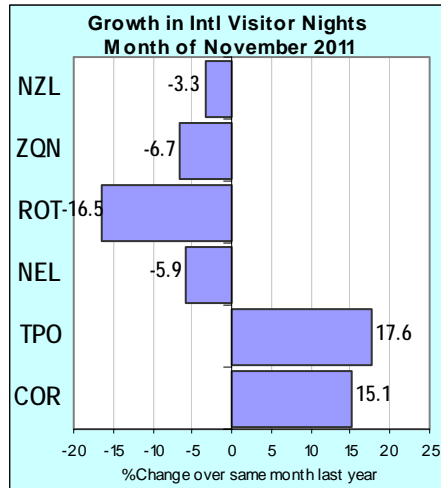
NEW ZEALAND VISITOR ACTIVITY

NZ International Visitor Night Benchmarking – Resort Regional Tourism Organisations

As the Rotorua Tourism in Focus report is Rotorua specific and Rotorua is a holiday resort destination, only a selection of those regional tourism organisations that are also holiday resort areas have been included in this analysis.

• Latest Performance

- For the **month** of November 2011, there was a 3.3% decrease in international visitor nights nationwide on the previous year – the greatest growth in international visitor nights was in Taupo (up 17.6%) and the least growth was in Rotorua (down 16.5%).
- For the **year** ending November 2011, there was a 3.6% decrease in international visitor nights nationwide on the previous year – the greatest growth in international visitor nights was in Taupo (up 4.0%) and the least growth was in Queenstown (down 9.2%).



• Summary Indicators

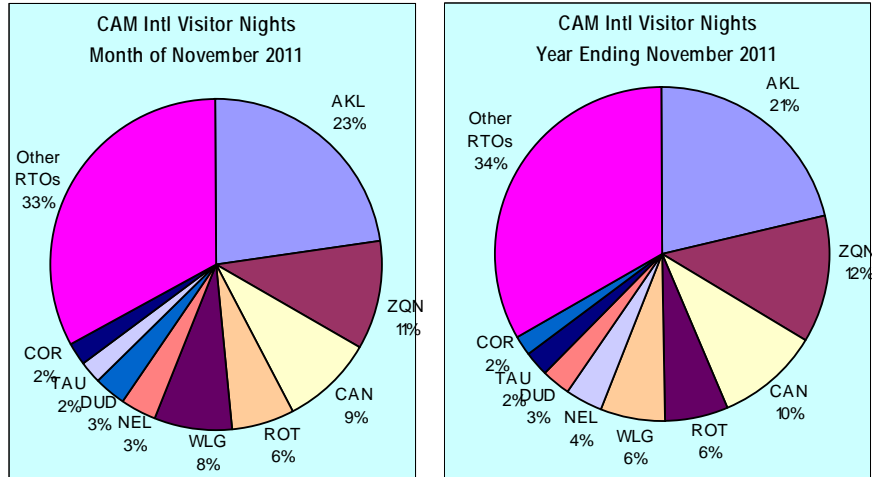
- For the **month** of November 2011, there were 1,195,565 international visitor nights nationwide, down 40,833 nights or 3.3% on the previous year – visitor nights spent in Queenstown down 6.7% to 125,745 nights, Rotorua down 16.5% to 70,719 nights, Nelson down 5.9% to 40,395 nights, Taupo up 17.6% to 28,112 nights and Coromandel up 15.1% to 27,556 nights.
- For the **year** ending November 2011, there were 13,014,386 international visitor nights nationwide, down 484,956 nights or 3.6% on the previous year – visitor nights spent in Queenstown down 9.2% to 1,597,663 nights, Rotorua down 7.8% to 778,937 nights, Nelson up 2.1% to 459,188 nights, Taupo up 4.0% to 316,069 nights and Coromandel up 1.8% to 266,939 nights.

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
NZ Intl Visitor Nights	1,275,380	1,236,398	1,195,565	-3.1	-3.3	13,188,709	13,499,342	13,014,386	2.4	-3.6
Queenstown	138,565	134,731	125,745	-2.8	-6.7	1,564,570	1,758,622	1,597,663	12.4	-9.2
Rotorua	75,117	84,715	70,719	12.8	-16.5	773,064	844,529	778,937	9.2	-7.8
Nelson	44,307	42,908	40,395	-3.2	-5.9	439,991	449,929	459,188	2.3	2.1
Taupo	34,464	23,908	28,112	-30.6	17.6	325,936	303,867	316,069	-6.8	4.0
Coromandel	25,662	23,942	27,556	-6.7	15.1	251,323	262,250	266,939	4.3	1.8

NEW ZEALAND VISITOR ACTIVITY

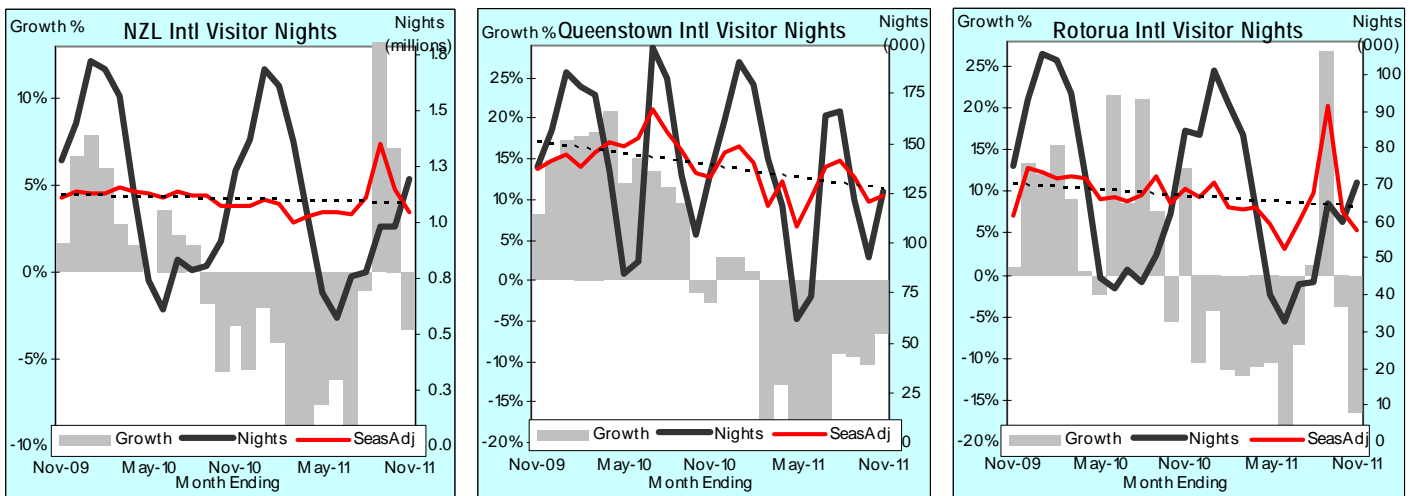
Market Share

- For the **month** of November 2011, Auckland accounted for 23% of international visitor nights, Queenstown for 11%, Canterbury for 9%, Wellington for 8%, Rotorua for 6%, Nelson and Dunedin for 3% each, Taupo and Coromandel for 2% each, and the other RTOs collectively for the remaining 33%.
- For the **year** ending November 2011, Auckland accounted for 21% of international visitor nights, Queenstown for 12%, Canterbury for 10%, Rotorua and Wellington for 6% each, Nelson for 4%, Dunedin for 3%, Taupo and Coromandel for 2% each, and the other RTOs collectively for the remaining 34%.



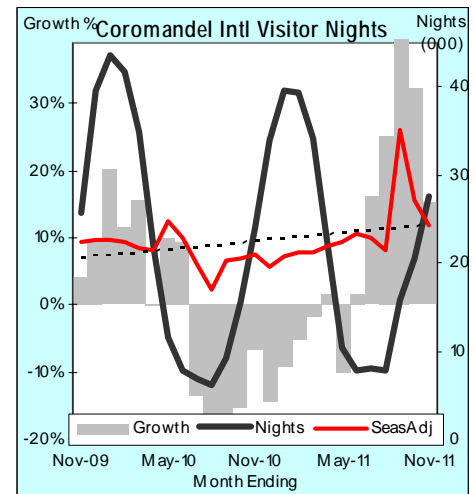
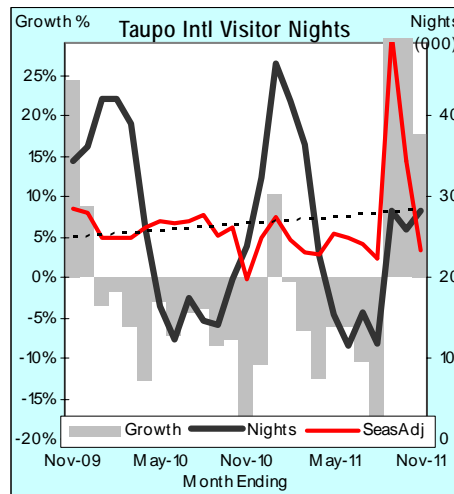
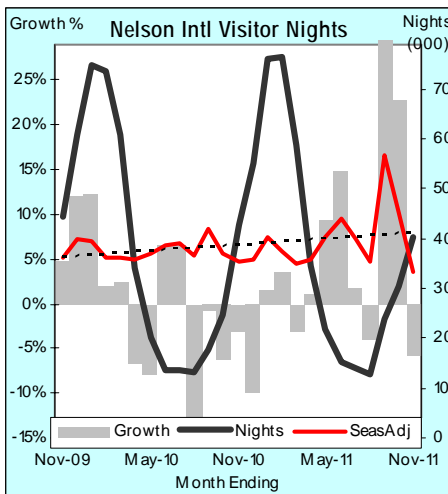
Trends & Patterns

- 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 negative growth in 13 of the most recent 15 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 negative growth in 11 of the most recent 14 months, following a period of positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 negative growth in 10 of the most recent 12 months, following a period of positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 positive growth in eight of the most recent 11 months, following a period of negative growth, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in the three most recent months, and overall when combined with the other few months of positive growth has resulted in an upward trend in seasonally adjusted 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 positive growth in seven of the most recent eight months, following a period of negative growth, and overall has resulted in an upward trend in seasonally adjusted international visitor nights.



INTERNATIONAL Visitor Night Growth Benchmarking – Month of November 2011

	All NZ	Rotorua	Your Biz	Example
Step 1. Enter YOUR international visitor nights for November 2011	1,195,565	70,719		520
Step 2. Enter YOUR international visitor nights for November 2010	1,236,398	84,715		500
Step 3. Subtract Step 2 from Step 1.	-40,833	-13,996		20
Step 4. Divide Step 3 by Step 2.	-0.033	-0.165		0.040
Step 5. Multiply Step 4 by 100 = International Visitor Night growth	-3.3%	-16.5%	%	4.0%

Eg. An accommodation provider that had 520 international visitor nights for month of November 2011 had a 4.0% increase in international visitor nights over the 500 international visitor nights for November 2010. The 4.0% positive growth in international visitor nights at this accommodation provider was better than both the average growth in international visitor nights of all Rotorua accommodation providers (-16.5%), and also the average growth in international visitor nights of all New Zealand accommodation providers (-3.3%).

- **Data Sources**

- Statistics New Zealand – Commercial Accommodation Monitor

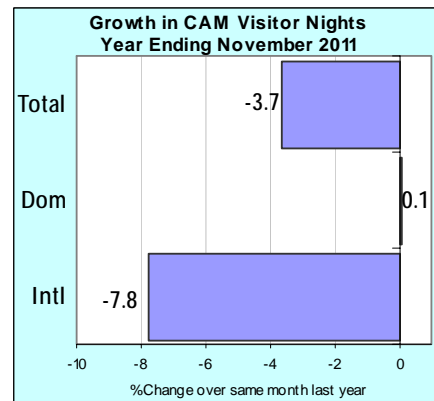
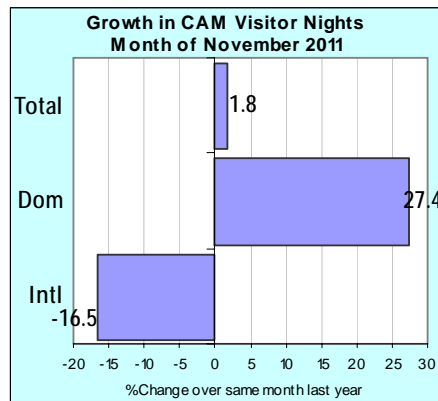
Rotorua Commercial Accommodation Monitor (CAM)

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.

Rotorua CAM Key Performance Indicators

• Latest Performance

- For the **month** of November 2011, there was a 1.8% increase in visitor nights on the previous year – visitor nights increased for domestic visitors (up 27.4%) and decreased for international visitors (down 16.5%).
- For the **year** ending November 2011, there was a 3.7% decrease in visitor nights on the previous year – visitor nights increased for domestic visitors (up 0.1%) and decreased for international visitors (down 7.8%).



• Summary Indicators

- For the **month** of November 2011, there were 88,649 visitor arrivals, up 2,422 arrivals or 2.8% on the previous year – those 88,649 visitors stayed an average 1.67 nights (down 1.0%) for a collective 147,812 visitor nights (up 1.8%).
 - Domestic nights were up 27.4% to 77,093 nights
 - International nights were down 16.5% to 70,719 nights
- For the **year** ending November 2011, there were 970,399 visitor arrivals, down 57,106 or 5.6% on the previous year – those 970,399 visitors stayed an average 1.76 nights (up 2.0%) for a collective 1,709,282 visitor nights (down 3.7%).
 - Domestic nights were up 0.1% to 930,344 nights
 - International nights were down 7.8% to 778,937 nights

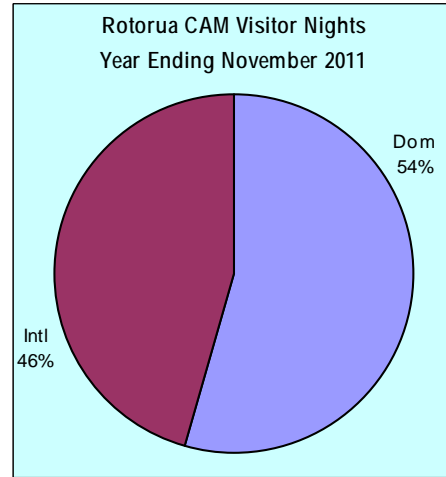
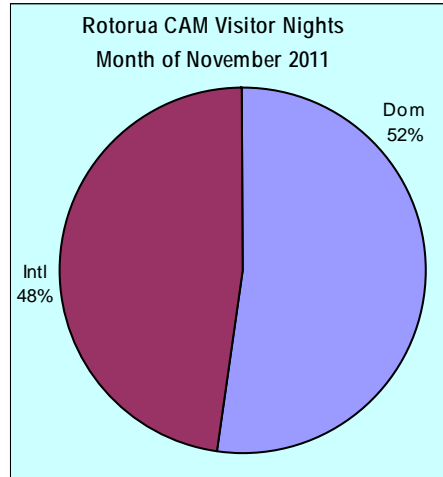
	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
Visitor Arrivals	86,636	86,227	88,649	-0.5	2.8	970,080	1,027,505	970,399	5.9	-5.6
Length of Stay	1.60	1.68	1.67	5.2	-1.0	1.75	1.73	1.76	-1.5	2.0
Visitor Nights - Total	138,662	145,234	147,812	4.7	1.8	1,700,003	1,774,353	1,709,282	4.4	-3.7
Domestic	63,545	60,519	77,093	-4.8	27.4	926,940	929,829	930,344	0.3	0.1
International	75,117	84,715	70,719	12.8	-16.5	773,064	844,529	778,937	9.2	-7.8

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

ROTORUA VISITOR ACTIVITY

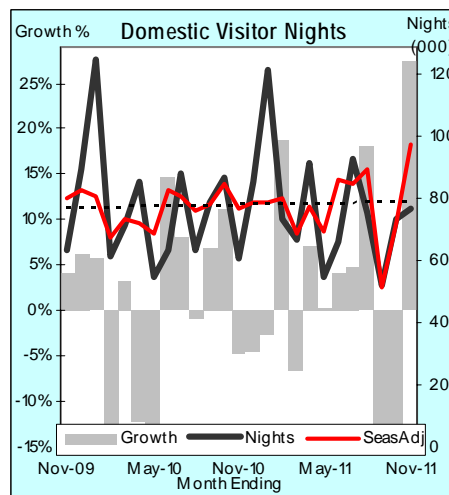
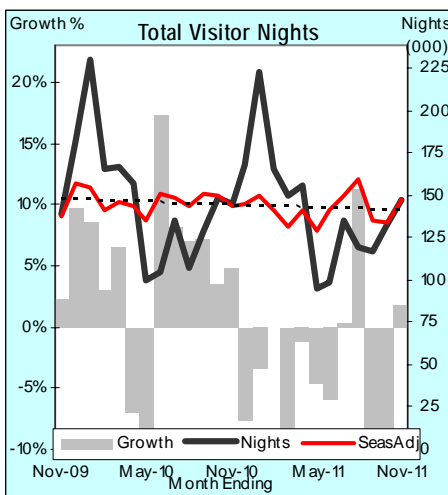
Market Segmentation

- For the **month** of November 2011, domestic visitor nights accounted for 52% of visitor nights, and international visitors for the remaining 48% of visitor nights.
- For the **year** ending November 2011, domestic visitor nights accounted for 54% of visitor nights, and international visitors for the remaining 46% 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 negative growth in nine of the most recent 12 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 positive growth in seven of the most recent 10 months, following a period of mixed growth, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in 10 of the most recent 12 months, following a period of positive growth, and overall has resulted in a downward trend in seasonally adjusted international visitor nights.



Data Sources

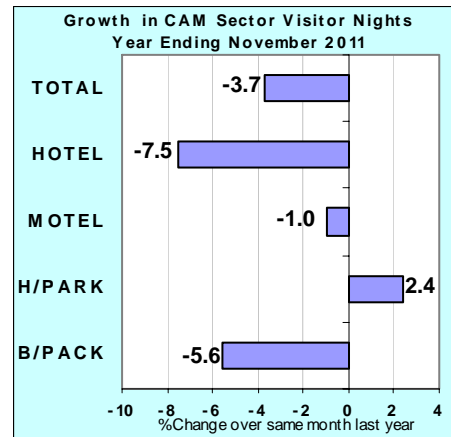
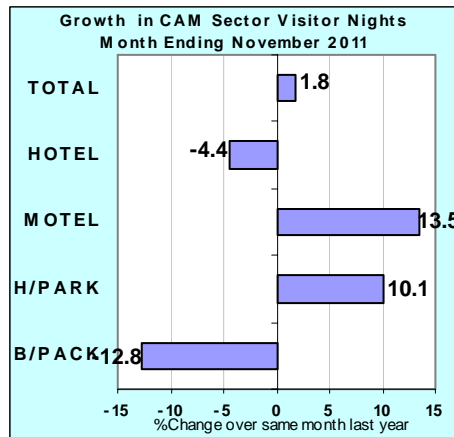
- Statistics New Zealand – Commercial Accommodation Monitor

ROTORUA VISITOR ACTIVITY

Rotorua CAM Sector Analysis

• Latest Performance

- For the **month** of November 2011, there was a 1.8% increase in Rotorua visitor nights on the previous year – the motel sector had the greatest growth (up 13.5%) and the backpacker sector had the least growth (down 12.8%).
- For the **year** ending November 2011, there was a 3.7% decrease in Rotorua visitor nights on the previous year – the holiday park sector had the greatest growth (up 2.4%) and the hotel sector had the least growth (down 7.5%).



• Summary Indicators

- For the **month** of November 2011, there were 147,812 visitor nights spent in Rotorua commercial accommodation, up 2,578 nights or 1.8% on the previous year.
 - Hotel nights were down 4.4% to 64,314 nights
 - Motel nights were up 13.5% to 46,812 nights
 - Holiday park nights were up 10.1% to 22,625 nights
 - Backpacker nights were down 12.8% to 14,061 nights
- For the **year** ending November 2011, there were 1,709,282 visitor nights spent in Rotorua commercial accommodation, down 65,071 nights or 3.7% on the previous year.
 - Hotel nights were down 7.5% to 697,548 nights
 - Motel nights were down 1.0% to 548,713 nights
 - Holiday park nights were up 2.4% to 289,278 nights
 - Backpacker nights were down 5.6% to 173,745 nights

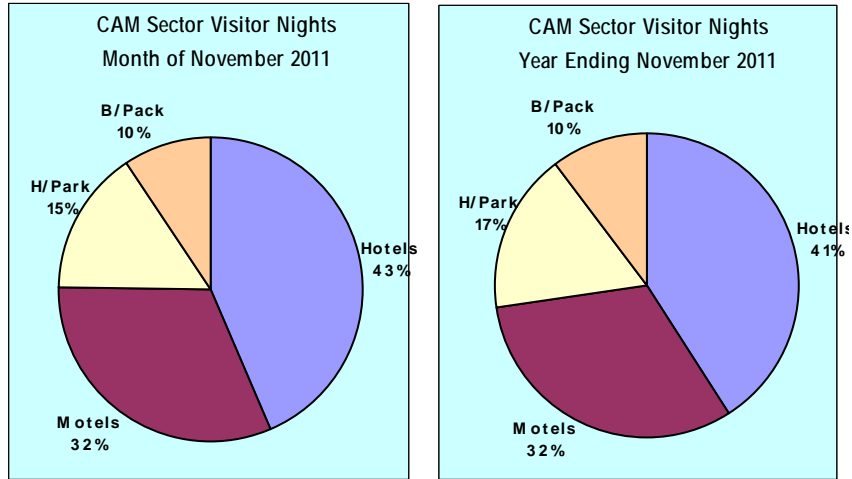
ROTORUA	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
Total Visitor Nights	138,662	145,234	147,812	4.7	1.8	1,700,003	1,774,353	1,709,282	4.4	-3.7
Hotel	62,522	67,302	64,314	7.6	-4.4	694,359	753,967	697,548	8.6	-7.5
Motel	40,618	41,255	46,812	1.6	13.5	539,616	554,061	548,713	2.7	-1.0
Holiday Park	19,021	20,554	22,625	8.1	10.1	273,158	282,363	289,278	3.4	2.4
Backpackers	16,502	16,123	14,061	-2.3	-12.8	192,871	183,968	173,745	-4.6	-5.6

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

ROTORUA VISITOR ACTIVITY

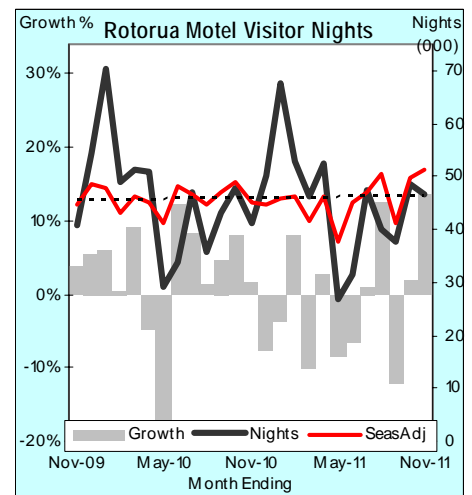
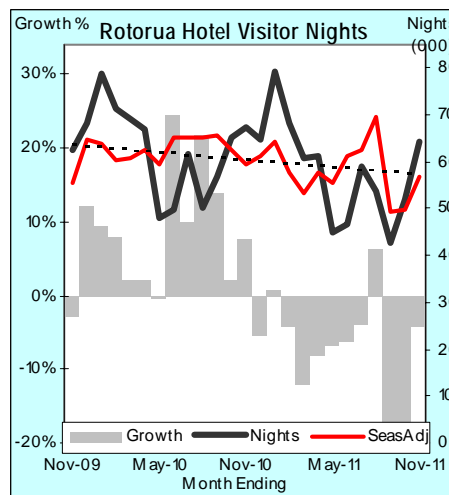
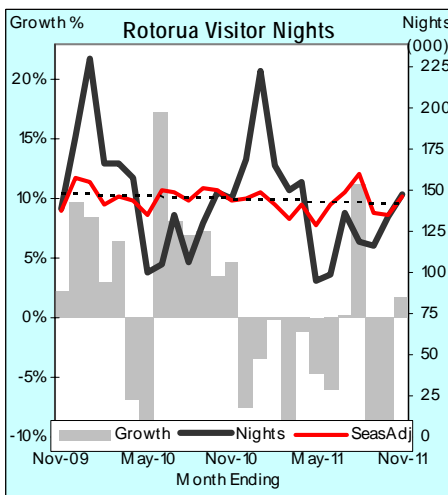
- **Market Segmentation**

- For the **month** of November 2011, hotels accounted for 39% of Rotorua visitor nights, motels for 36%, holiday parks for 16% and backpackers for 9%.
- For the **year ending** November 2011, hotels accounted for 41% of Rotorua visitor nights, motels for 32%, holiday parks for 17% and backpackers for 10%.



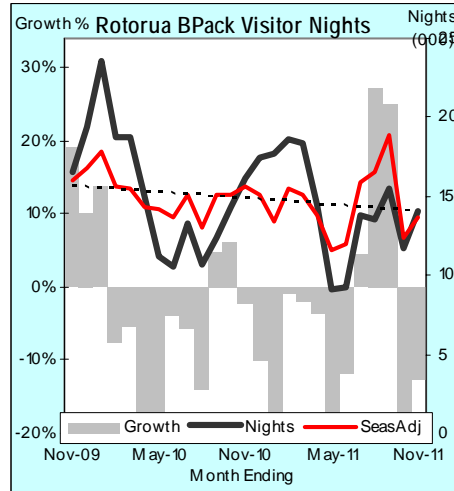
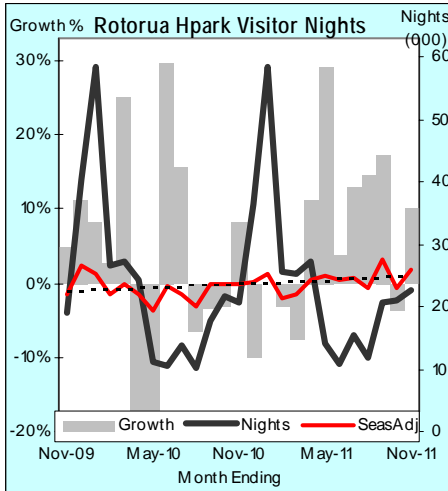
- **Trends & Patterns**

- 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 negative growth in nine of the most recent 12 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 negative growth in 10 of the most recent 12 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted 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 negative growth in six of the most recent 12 months, following a period of mostly positive growth, and overall has resulted in an upward trend in seasonally adjusted 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 positive growth in 15 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in 17 of the 25 graphed months, and overall has resulted in a downward trend in seasonally adjusted backpacker visitor nights.



Visitor Night Benchmarking by Sector – Month of November 2011

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
Step 1. Enter YOUR visitor nights for November 2011					1,650
Step 2. Enter YOUR visitor nights for November 2010					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	-4.4%	13.5%	10.1%	-12.8%	13.5%
NZ Avg Visitor Night growth	-8.8%	5.8%	7.3%	-7.1%	5.8%

Eg. A motel that had 1650 visitor nights for month of November 2011 had a 10.0% increase in visitor nights over the 1500 visitor nights for November 2010. The 10.0% positive growth in visitor nights at this motel was poorer than the average growth in visitor nights of all Rotorua motels (+13.5%), but better than the average growth in visitor nights of all New Zealand motels (+5.8%).

• 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).

Summary Indicators

- For the **month** of November 2011, there were 181,500 stay units available in Rotorua commercial accommodation, down 3,180 stay units or 1.7% on the previous year. Of the 181,500 available stay units, 87,020 units were occupied (up 4.9%), which resulted in a 47.9% occupancy rate.
 - Hotel occupancy was up from 69.1% to 70.2%
 - Motel occupancy was up from 48.0% to 56.2%
 - Holiday Park occupancy was up from 17.3% to 22.7%
 - Backpacker occupancy was down from 47.1% to 43.2%
- For the **year ending** November 2011, there were 2,238,024 stay units available in Rotorua commercial accommodation, up 7,167 stay units or 0.3% on the previous year. Of the 2,238,024 available stay units, 925,821 units were occupied (down 1.6%), which resulted in a 41.4% occupancy rate.
 - Hotel occupancy was down from 61.2% to 58.8%
 - Motel occupancy was up from 46.2% to 49.2%
 - Holiday Park occupancy was static at 18.3%
 - Backpacker occupancy was down from 44.3% to 42.1%

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
All Accommodation										
Stay Units Available	183,480	184,680	181,500	0.7	-1.7	2,204,680	2,230,857	2,238,024	1.2	0.3
Stay Units Occupied	79,658	82,973	87,020	4.2	4.9	910,375	940,653	925,821	3.3	-1.6
Occupancy	43.4%	44.9%	47.9%	1.5 pts	3.0 pts	41.3%	42.2%	41.4%	0.9 pts	-0.8 pts
Hotel										
Stay Units Available	55,650	55,680	53,610	0.1	-3.7	676,894	674,579	662,945	-0.3	-1.7
Stay Units Occupied	36,002	38,474	37,647	6.9	-2.1	378,644	412,796	389,554	9.0	-5.6
Occupancy	64.7%	69.1%	70.2%	4.4 pts	1.1 pts	55.9%	61.2%	58.8%	9.4 pts	-2.4 pts
Motel										
Stay Units Available	42,450	42,030	41,640	-1.0	-0.9	510,516	515,555	509,340	1.0	-1.2
Stay Units Occupied	18,930	20,165	23,396	6.5	16.0	235,106	238,362	250,831	1.4	5.2
Occupancy	44.6%	48.0%	56.2%	3.4 pts	8.2 pts	46.1%	46.2%	49.2%	0.4 pts	3.0 pts
Holiday Park										
Stay Units Available	54,120	55,710	54,990	2.9	-1.3	632,010	660,393	685,409	4.5	3.8
Stay Units Occupied	9,725	9,619	12,472	-1.1	29.7	119,374	121,053	125,430	1.4	3.6
Occupancy	18.0%	17.3%	22.7%	-0.7 pts	5.4 pts	18.9%	18.3%	18.3%	-3.0 pts	0.0 pts
Backpackers										
Stay Units Available	31,260	31,260	31,260	0.0	0.0	385,260	380,330	380,330	-1.3	0.0
Stay Units Occupied	15,001	14,715	13,504	-1.9	-8.2	177,248	168,442	160,006	-5.0	-5.0
Occupancy	48.0%	47.1%	43.2%	-0.9 pts	-3.9 pts	46.0%	44.3%	42.1%	-3.7 pts	-2.2 pts

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 November 2011

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
Step 1. Enter YOUR stay units <u>occupied</u> for November 2011					430
Step 2. Enter YOUR stay units <u>available</u> for November 2011					750
Step 3. Divide Step 1 by Step 2 .					0.573
Step 4. Multiply Step 3 by 100 = Occupancy Rate					57.3%
Rotorua Avg Occupancy	70.2%	56.2%	22.7%	43.2%	56.2%
NZ Avg Occupancy	62.9%	56.1%	13.6%	43.9%	56.1%

Eg. A motel that had 25 rooms/units available on the last day of the month had 750 room nights available for the month of November 2011 (ie. 25 rooms multiplied by 30 days). If 430 of the 750 available room nights were occupied during the month of November 2011, that motel had an occupancy rate of 57.3%, which was better than both the average occupancy for all Rotorua motels (56.2%), and also the average occupancy of all New Zealand motels (56.1%).

Market Share of Occupied Stay Units by Sector – Month of November 2011

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
No. of Establishments	20	77	12	11	77
Step 1. Enter YOUR stay units <u>occupied</u> for November 2011					430
Step 2. Total Rotorua stay units <u>occupied</u> for November 2011	37,647	23,396	12,472	13,504	23,396
Step 3. Divide Step 1 by Step 2 .					0.018
Step 4. Multiply Step 3 by 100 = Market Share	%	%	%	%	1.8%
Rotorua Avg Market Share	5.0%	1.3%	8.3%	9.1%	1.3%

Eg. A motel that had 430 occupied rooms for the month of November 2011 had a 1.8% market share of the 23,396 occupied stay units in Rotorua motels, which was more than the average market share of Rotorua motels (1.3%).

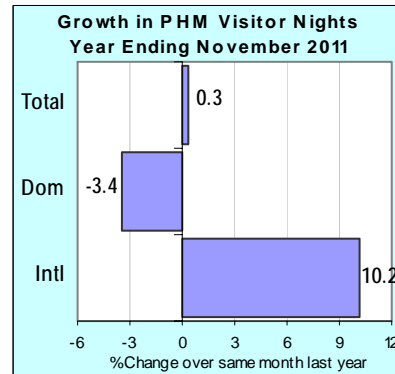
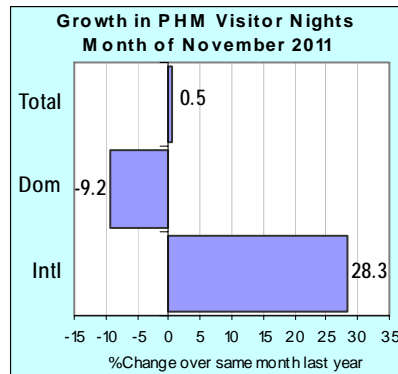
- Data Sources
 - Statistics New Zealand – Commercial Accommodation Monitor

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 250-300 of those households choose to provide data, which APR Consultants then extrapolates to the 22,000+ Rotorua households and reports in the Rotorua Private Homes Monitor.

• Latest Performance

- For the **month** of November 2011, there was a 0.5% increase in visitor nights on the previous year – visitor nights decreased for domestic visitors (down 9.2%) and increased for international visitors (up 28.3%).
- For the **year** ending November 2011, there was a 0.3% increase in visitor nights on the previous year – visitor nights decreased for domestic visitors (down 3.4%) and increased for international visitors (up 10.2%).



• Summary Indicators

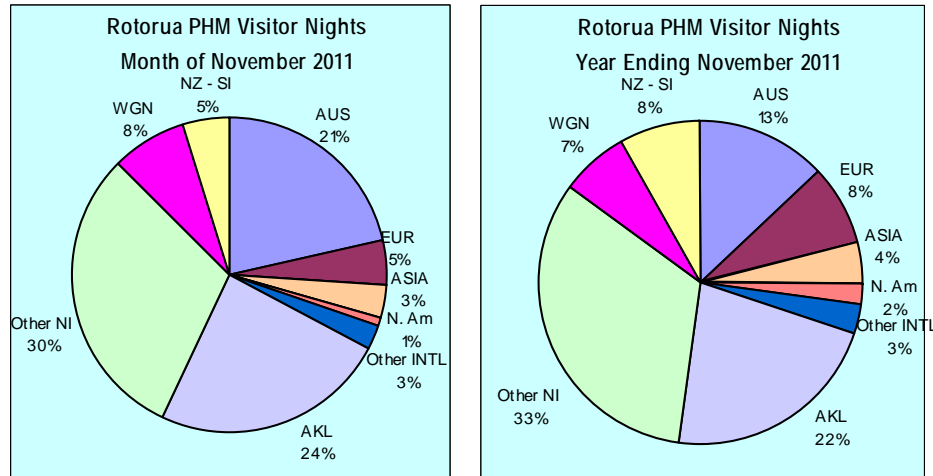
- For the **month** of November 2011, there were 26,435 visitor arrivals, up 1,406 arrivals or 5.6% on the previous year – those 26,435 visitors stayed an average 3.45 nights (down 4.9%) for a collective 91,160 visitor nights (up 0.5%).
 - Domestic nights were down 9.2% to 61,211 nights
 - International nights were up 28.3% to 29,949 nights
- For the **year** ending November 2011, there were 375,747 visitor arrivals, down 6,201 arrivals or 1.6% on the previous year - those 375,747 visitors stayed an average 3.87 nights (up 2.0%) for a collective 1,455,287 visitor nights (up 0.3%).
 - Domestic nights were down 3.4% to 1,014,678 nights
 - International nights were up 10.2% to 440,609 nights

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
Visitor Arrivals	29,204	25,029	26,435	-14.3	5.6	366,029	381,948	375,747	4.3	-1.6
Length of Stay	3.24	3.63	3.45	11.9	-4.9	3.93	3.80	3.87	-3.5	2.0
Visitor Nights - Total	94,601	90,731	91,160	-4.1	0.5	1,439,764	1,450,434	1,455,287	0.7	0.3
Domestic	70,104	67,393	61,211	-3.9	-9.2	1,042,935	1,050,570	1,014,678	0.7	-3.4
International	24,497	23,338	29,949	-4.7	28.3	396,829	399,864	440,609	0.8	10.2

ROTORUA VISITOR ACTIVITY

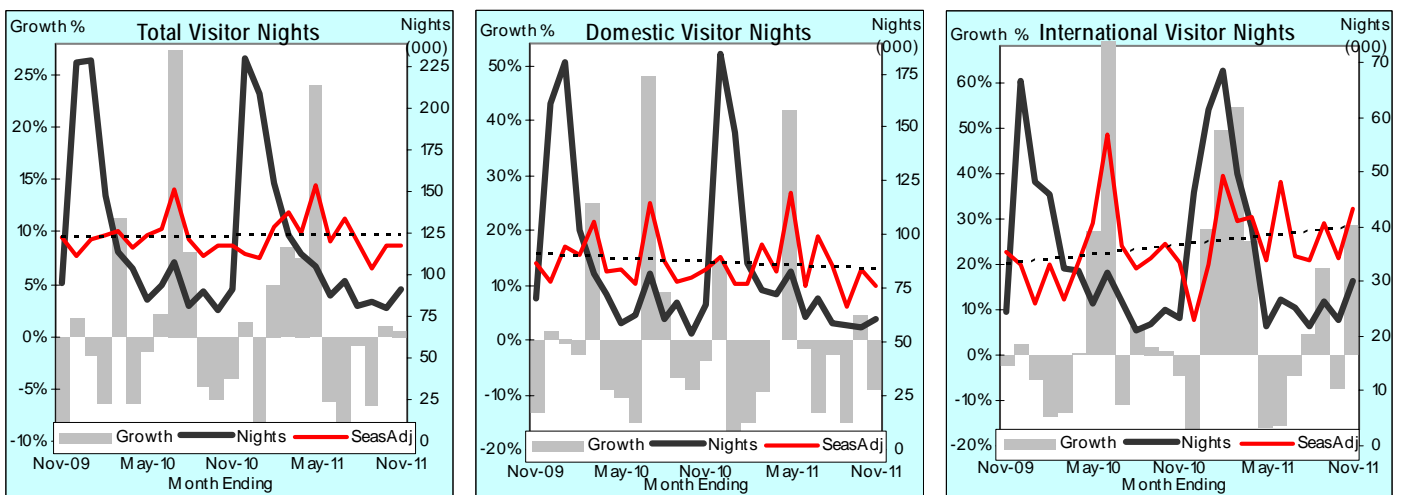
Market Segmentation

- For the **month** of November 2011, domestic visitors accounted for 67% of visitor nights, and international visitors for the remaining 33% of visitor nights.
- For the **year** ending November 2011, domestic visitors accounted for 70% of visitor nights, and international visitors for the remaining 30% 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 negative growth in four of the most recent six months, following a period of mixed growth, and overall has resulted in a static trend in seasonally adjusted 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 negative growth in 18 of the 25 graphed months and overall has resulted in a downward trend in seasonally adjusted 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 positive growth in 14 of the 25 graphed months and overall has resulted in an upward trend in seasonally adjusted visitor nights.



Data Sources

- APR Consultants – Rotorua Private Homes Monitor

Rotorua Attraction & Activities Monitor

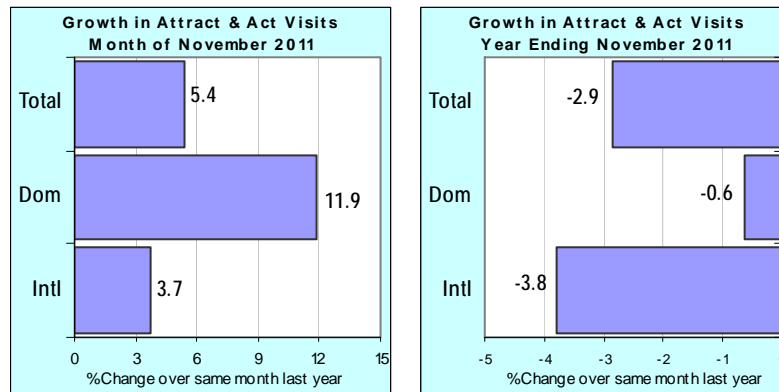
The Rotorua Attraction & Activities Monitor measures visitor activity occurring at 28 popular Rotorua tourism businesses. Each month these businesses submit visitor origin data to APR Consultants who then report the aggregated results in the Rotorua Attraction & Activities Monitor.

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 Puia, Waimangu Volcanic Valley, and Waiotapu Thermal Wonderland

Activities Sites: Agroventures, K-Jet Rotorua, Mokoia Island Cruises, NZ River Jet, NZONE, Off Road NZ, OGO Rotorua, Paradise Valley Ventures, Pure Cruise, River Rats Rafting (merged with Raftabout – modified return), Rotorua Duck Tours, Te Urewera Treks, Volcanic Air Safaris, Wet 'n' Wild Rafting, Zorb Rotorua

• Latest Performance

- For the **month** of November 2011, there was a 5.4% increase in attraction and activities visits on the previous year – visits increased for both domestic visitors (up 11.9%) and for international visitors (up 3.7%).
- For the **year** ending November 2011, there was a 2.9% decrease in attraction and activities visits on the previous year – visits decreased for both domestic visitors (down 0.6%) and for international visitors (down 3.8%).



• Summary Indicators

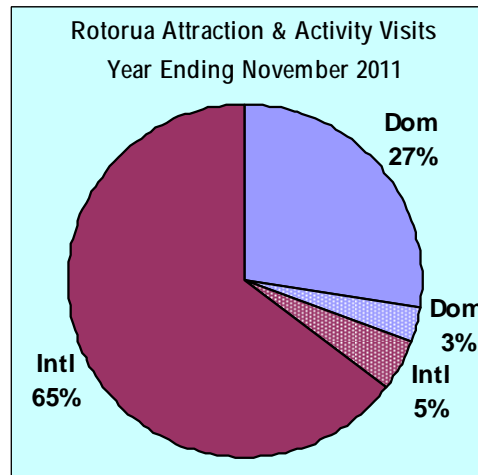
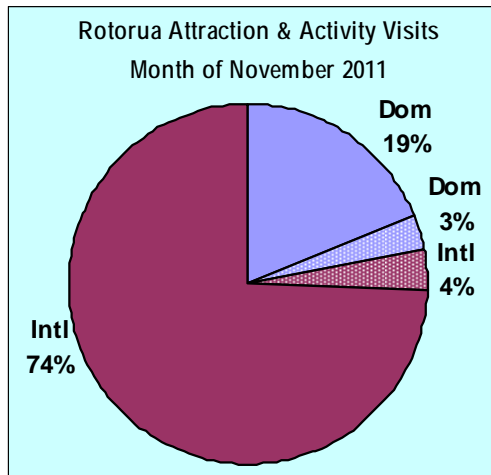
- For the **month** of November 2011, there were 198,215 attraction and activities visits, up 10,160 visits or 5.4% on the previous year – domestic visits increased 11.9% to 43,417 visits, and international visits increased 3.7% to 154,798 visits.
 - Attraction visits increased 4.9% to 184,886 visits - domestic visits increased 9.8% to 37,426 visits, and international visits increased 3.7% to 147,460 visits.
 - Activities visits increased 12.9% to 13,329 visits - domestic visits increased 27.1% to 5,991 visits, and international visits increased 3.4% to 7,338 visits.
- For the **year** ending November 2011, there were 2,091,476 attraction and activities visits, down 61,522 visits or 2.9% on the previous year – domestic visits decreased 0.6% to 641,850 visits, and international visits decreased 3.8% to 1,449,626 visits.
 - Attraction visits decreased 3.4% to 1,927,522 visits - domestic visits decreased 2.0% to 574,865 visits, and international visits decreased 4.0% to 1,352,657 visits.
 - Activities visits increased 3.9% to 163,954 visits - domestic visits increased 12.4% to 66,985 visits, and international visits decreased 1.3% to 96,969 visits.

	Month: November			Growth Rate (%)		Year Ended: November			Growth Rate (%)	
	2009	2010	2011	09-10	10-11	2009	2010	2011	09-10	10-11
TOTAL Visits	180,986	188,055	198,215	3.9	5.4	2,055,455	2,152,998	2,091,476	4.7	-2.9
Domestic	43,169	38,808	43,417	-10.1	11.9	675,640	646,022	641,850	-4.4	-0.6
International	137,817	149,247	154,798	8.3	3.7	1,379,815	1,506,976	1,449,626	9.2	-3.8
ATTRACTION Visits	168,935	176,248	184,886	4.3	4.9	1,896,819	1,995,195	1,927,522	5.2	-3.4
Domestic	39,033	34,096	37,426	-12.6	9.8	619,221	586,436	574,865	-5.3	-2.0
International	129,902	142,152	147,460	9.4	3.7	1,277,598	1,408,759	1,352,657	10.3	-4.0
ACTIVITIES Visits	12,051	11,807	13,329	-2.0	12.9	158,636	157,803	163,954	-0.5	3.9
Domestic	4,136	4,712	5,991	13.9	27.1	56,419	59,586	66,985	5.6	12.4
International	7,915	7,095	7,338	-10.4	3.4	102,217	98,217	96,969	-3.9	-1.3

ROTORUA VISITOR ACTIVITY

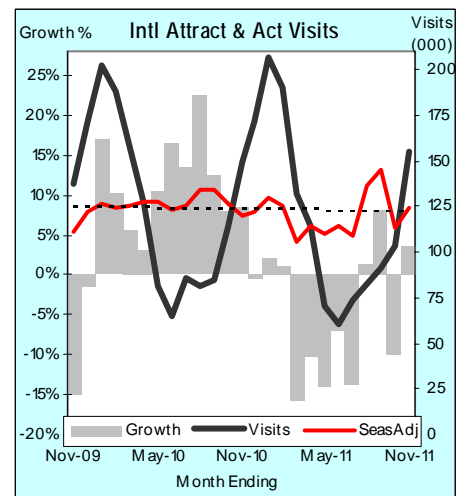
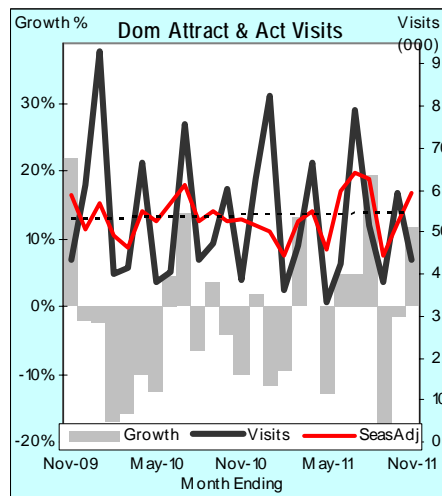
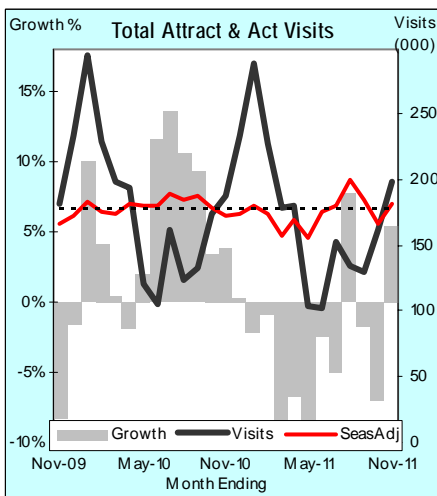
Market Segmentation

- For the **month** of November 2011, attraction operators (solid segments) accounted for 93% of visits and activities operators (shaded segments) for the remaining 7% of visits.
 - Domestic visitors (blue segments) accounted for 22% of visits and international visitors (red segments) for the remaining 78% of visits.
- For the **year** ending November 2011, 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 30% of visits and international visits (red segments) for the remaining 70% 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 negative growth in nine of the most recent 11 months, following a period of mostly positive growth, and overall has resulted in a downward trend in seasonally adjusted visits.
- There is a pattern alternating between peaks and troughs in **domestic** visits – the graphed period shows positive growth in six of the most recent nine months, following a period of mostly negative growth, and overall has resulted in an upward trend in seasonally adjusted 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 negative growth in seven of the most recent 12 months, following a period of positive growth, and overall has resulted in a downward trend in seasonally adjusted international visits.



ROTORUA VISITOR ACTIVITY

- Rotorua **ATTRACTION** Operator Benchmarking – Month of November 2011

	Total	Domestic	International	Example Total Visitors
Step 1. Enter YOUR visitors for November 2011				13,900
Step 2. Enter YOUR visitors for November 2010				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	4.9%	9.8%	3.7%	4.9%

Eg. An attraction site that had 13,900 visitors for the month of November 2011 had a 3.0% increase in total visitors over the 13,500 total visitors for November 2010. The 3.0% positive growth in visitors at this attraction site was poorer than the average growth in total attraction visits of all participating Rotorua attraction sites (+4.9%).

- Rotorua **ACTIVITIES** Operator Benchmarking – Month of November 2011

Step 1. Enter YOUR visitors for November 2011				950
Step 2. Enter YOUR visitors for November 2010				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	12.9%	27.1%	3.4%	12.9%

Eg. An activities business that had 950 visitors for the month of November 2011 had a 5.6% increase in total visitors over the 900 total visitors for November 2010. The 5.6% positive growth in visitors at this activities business was poorer than the average growth in total activities visits of all participating Rotorua activities operators (+12.9%).

- 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 Economic Development - www.med.govt.nz/sectors-industries/tourism
- Statistics New Zealand - www.statistics.govt.nz
- Destination Rotorua Marketing - www.rotoruaNZ.com

The tourism section of the Ministry of Economic Development website is New Zealand's portal of tourism sector research, statistics and information. Key material available from this website includes:

Tourism research and data

Access research and data compiled by the Ministry of Economic Development, Statistics New Zealand and others. This section includes a wide range of information on domestic and international tourism, and the economic impacts of tourism. In particular, this section incorporates the popular 'Core Tourism Dataset'.

Information for tourism businesses

Access information specifically addressing tourism business needs, including links to tourism organisations, regulatory information, and information on sustainability.

Tourism Policy

Access information about the work of the Ministry of Economic Development policy team.

Liability Disclaimer

While all care and diligence has been used in processing, analysing, and extracting data and information in this report, Destination Rotorua Marketing and Rotorua District Council gives no warranty it is error free and will not be liable for any loss or damage suffered by the use directly, or indirectly, of the information in this report. 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.