



Rotorua Tourism In Focus

July 2013



FOREWARD

13 September 2013

Kia Ora Industry Partners,

Nationally, the month of July 2013 showed positive growth in visitor activity over the same month of the previous year. International visitor arrivals to New Zealand for the month of July 2013 were up 5.9% and visitor nights spent in commercial accommodation were up 8.0%. The later timing of winter school holidays from late June last year to mid-July this year was the key factor contributing to the increased demand nationally for the month of July.

There was positive growth in international visitor activity for Rotorua's tourism industry for the month of July 2013 over the same month of the previous year. International visitor nights spent in Rotorua's commercial accommodation were up 10,400 nights or 25.6% (versus +9.7% national international benchmark), and international visits to Rotorua Attraction and Activities Monitor participants were up 6,300 visits or 8.1%.

There was mixed growth in domestic visitor activity for Rotorua's tourism industry for the month of July 2013 over the same month of the previous year. Domestic visitor nights spent in Rotorua's commercial accommodation were up 500 nights or 0.6% (versus +7.1% national domestic benchmark), and domestic visits to Rotorua Attraction and Activities Monitor participants were down 2,400 visits or 2.5%.

Overall, Rotorua had an increase of 10,900 nights (or +8.9%) spent in commercial accommodation (versus +8.0% national benchmark) and an increase of 3,900 visits (or +2.3%) to Attraction and Activities Monitor participants for the month of July 2013 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 July 2013.

Kind regards

Gina George
Tourism Insight Analyst
Destination Rotorua Marketing
DDI +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

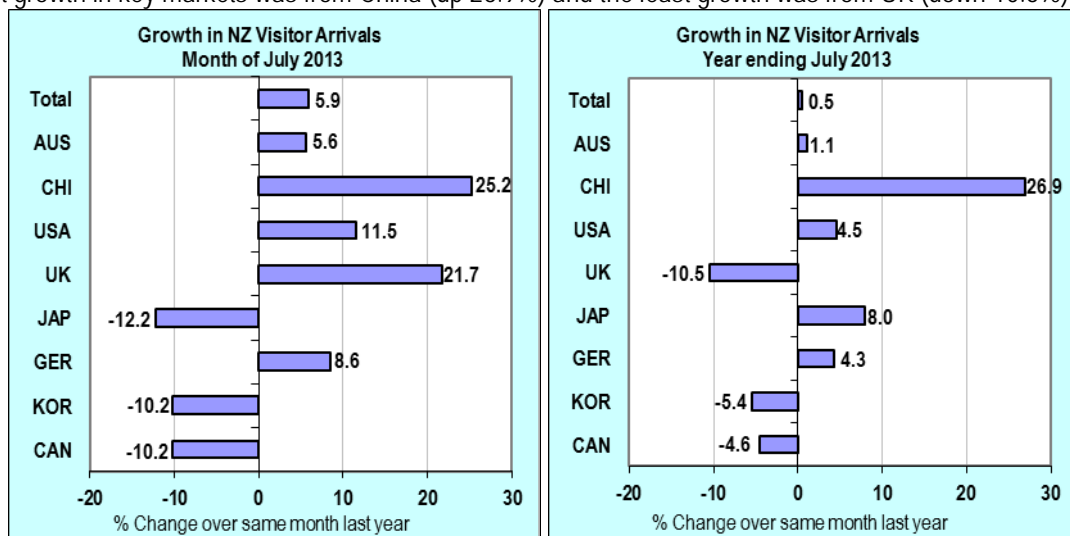
Foreward	1	ROTORUA VISITOR ACTIVITY	
NEW ZEALAND VISITOR ACTIVITY		• Rotorua Commercial Accommodation Monitor	
• International Visitor Arrivals	2	Key Performance Indicators	14
• NZ Commercial Accommodation		Sector Analysis	16
Visitor Night Benchmarking	5	Occupancy Analysis	19
Domestic Visitor Night Benchmarking	8	• Rotorua Private Homes Monitor	21
International Visitor Night Benchmarking	11	• Rotorua Attraction & Activities Monitor	23
		Data Sources and Liability Disclaimer	26

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 July 2013, there was a 5.9% increase in visitor arrivals to New Zealand on the previous year – the greatest growth in key markets was from China (up 25.2%) and the least growth was from Japan (down 12.2%).
- For the **year** ending July 2013, there was a 0.5% increase in visitor arrivals to New Zealand on the previous year – the greatest growth in key markets was from China (up 26.9%) and the least growth was from UK (down 10.5%).



• Summary Indicators

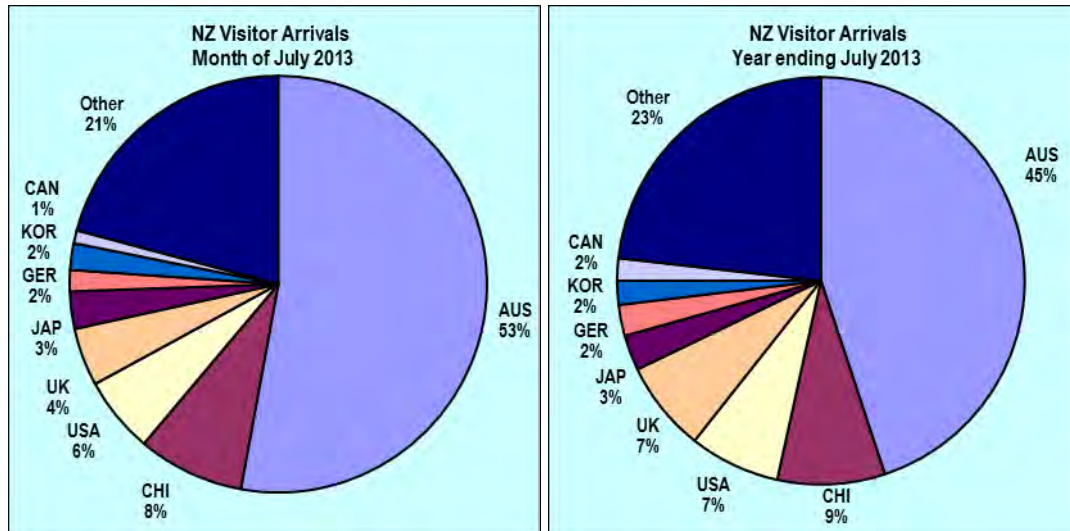
- For the **month** of July 2013, there were 183,718 visitor arrivals to New Zealand, up 10,179 arrivals or 5.9% on the previous year – visitor arrivals from: Australia up 5.6% to 97,152 arrivals, China up 25.2% to 15,168 arrivals, USA up 11.5% to 10,864 arrivals, UK up 21.7% to 8,256 arrivals, Japan down 12.2% to 5,312 arrivals, Germany up 8.6% to 3,040 arrivals, Korea down 10.2% to 3,808 arrivals, and Canada down 10.2% to 1,840 arrivals.
- For the **year** ending July 2013, there were 2,647,075 visitor arrivals to New Zealand, up 13,894 or 0.5% on the previous year - visitor arrivals from: Australia up 1.1% to 1,189,008 arrivals, China up 26.9% to 225,776 arrivals, USA up 4.5% to 190,576 arrivals, UK down 10.5% to 190,480 arrivals, Japan up 8.0% to 74,224 arrivals, Germany up 4.3% to 65,280 arrivals, Korea down 5.4% to 50,272 arrivals, and Canada down 4.6% to 46,752 arrivals.

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
Visitor Arrivals -	176,084	173,539	183,718	-1.4	5.9	2,494,483	2,633,181	2,647,075	5.6	0.5
Australia	91,664	92,000	97,152	0.4	5.6	1,108,080	1,175,632	1,189,008	6.1	1.1
China	9,696	12,112	15,168	24.9	25.2	133,304	177,904	225,776	33.5	26.9
USA	10,224	9,744	10,864	-4.7	11.5	186,662	182,336	190,576	-2.3	4.5
UK	8,416	6,784	8,256	-19.4	21.7	218,907	212,816	190,480	-2.8	-10.5
Japan	4,368	6,048	5,312	38.5	-12.2	76,447	68,752	74,224	-10.1	8.0
Germany	3,184	2,800	3,040	-12.1	8.6	64,989	62,608	65,280	-3.7	4.3
Korea	4,928	4,240	3,808	-14.0	-10.2	58,699	53,152	50,272	-9.4	-5.4
Canada	2,336	2,048	1,840	-12.3	-10.2	48,249	49,008	46,752	1.6	-4.6

NEW ZEALAND VISITOR ACTIVITY

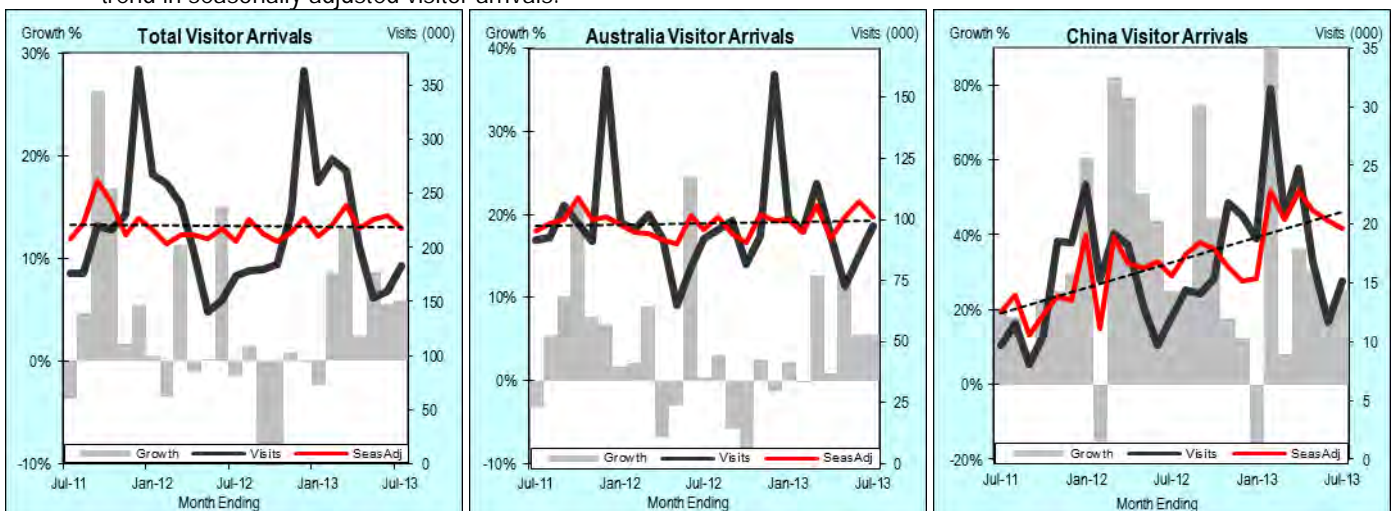
- **Market Segmentation**

- For the **month** of July 2013, arrivals from Australia accounted for 53% of visitor arrivals to New Zealand, China for 8%, USA for 6%, UK for 4%, Japan for 3%, Germany and Korea for 2% each, Canada for 1% each, and other countries collectively for the remaining 21%.
- For the **year ending** July 2013, arrivals from Australia accounted for 45% of visitor arrivals to New Zealand, China for 9%, USA and UK for 7% each, Japan for 3%, Germany, Korea and Canada for 2% each, and other countries collectively for the remaining 23%.



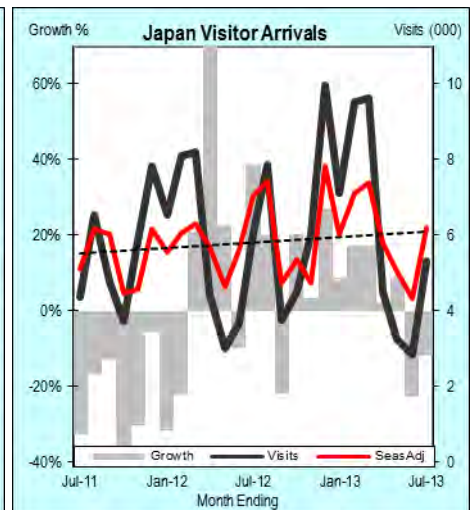
- **Trends & Patterns**

- 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 shows positive growth in 17 of the 25 graphed months, and overall has resulted in a static 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 shows positive growth in 18 of the 25 graphed months, and overall has resulted in an upward 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 positive growth in 23 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted visitor arrivals.

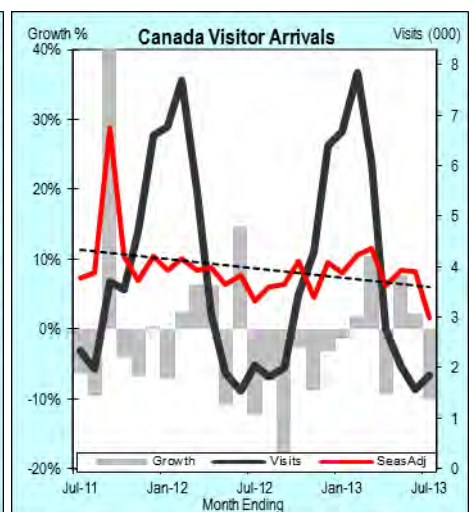
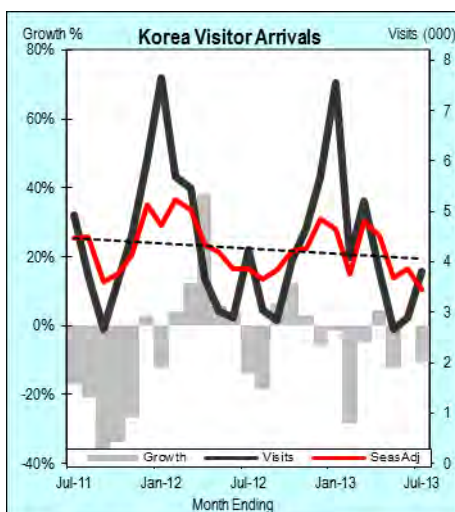
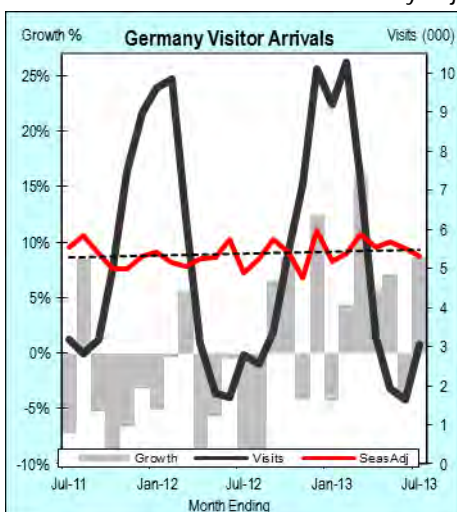


NEW ZEALAND VISITOR ACTIVITY

- 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 positive growth in six of the most recent seven months, 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 **United Kingdom**, 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 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 positive growth in 13 of the most recent 17 months, 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 **Germany**, with peaks occurring 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 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 **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 negative growth in six of the most recent eight 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 **Canada**, with peaks occurring in the summer season and troughs in the winter – 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.



• Data Sources

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

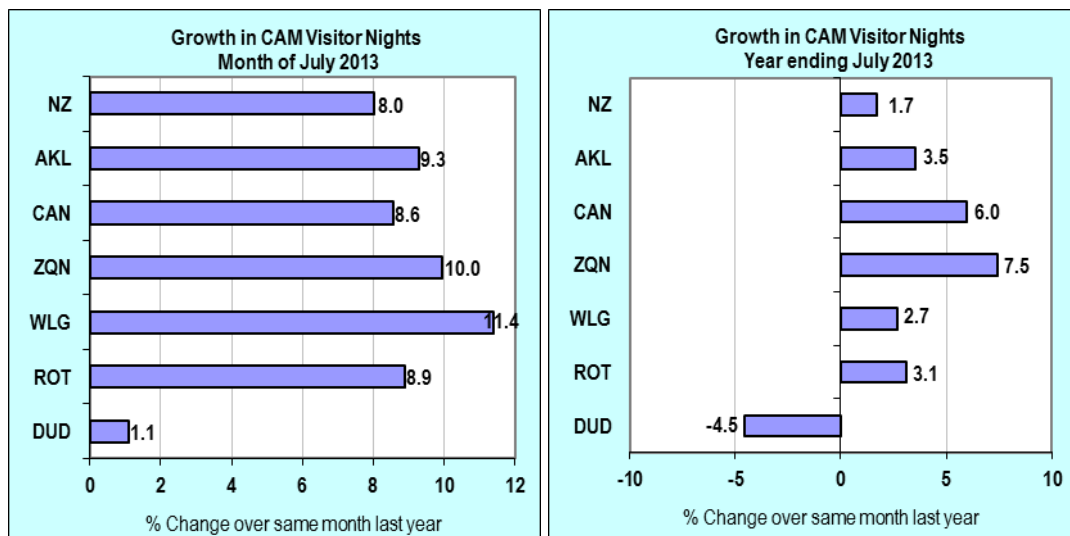
NZ Commercial Accommodation Monitor (CAM)

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 July 2013, there was an 8.0% increase in visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Wellington (up 11.4%) and the least growth was in Dunedin (up 1.1%).
- For the year ending July 2013, there was a 1.7% increase in visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Queenstown (up 7.5%) and the least growth was in Dunedin (down 4.5%).



- Summary Indicators

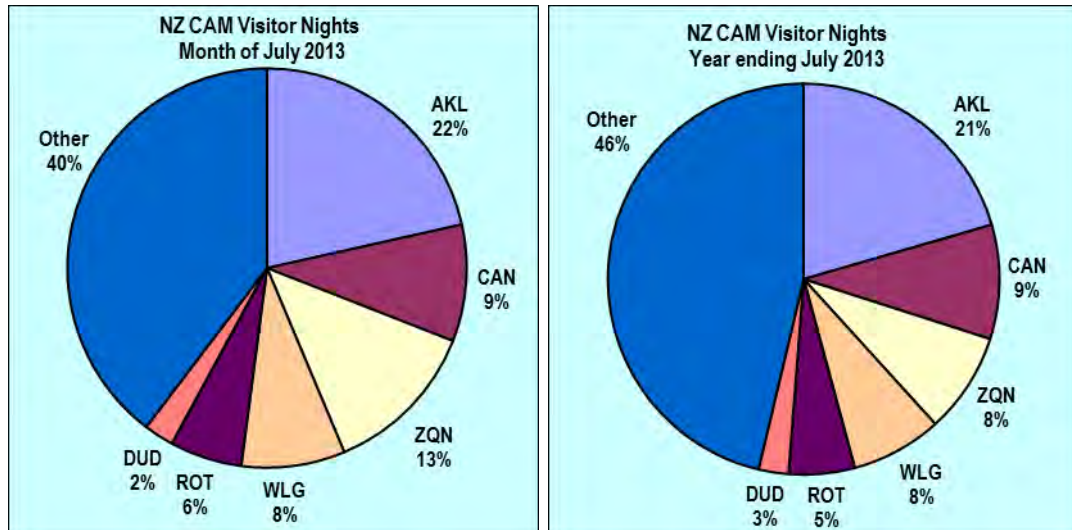
- For the month of July 2013, there were 2,277,607 visitor nights nationwide, up 169,193 nights or 8.0% on the previous year – visitor nights spent in Auckland up 9.3% to 489,641 nights, Canterbury up 8.6% to 215,220 nights, Queenstown up 10.0% to 289,891 nights, Wellington up 11.4% to 191,235 nights, Rotorua up 8.9% to 133,382 nights, and Dunedin up 1.1% to 55,051 nights.
- For the year ending July 2013, there were 32,138,690 visitor nights nationwide, up 537,773 nights or 1.7% on the previous year – visitor nights spent in Auckland up 3.5% to 6,590,464 nights, Canterbury up 6.0% to 3,034,155 nights, Queenstown up 7.5% to 2,675,148 nights, Wellington up 2.7% to 2,418,641 nights, Rotorua up 3.1% to 1,750,662 nights, and Dunedin down 4.5% to 793,591 nights.

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
NZ Visitor Nights	2,259,130	2,108,414	2,277,607	-6.7	8.0	31,874,500	31,600,917	32,138,690	-0.9	1.7
Auckland	485,692	448,008	489,641	-7.8	9.3	6,024,171	6,366,467	6,590,464	5.7	3.5
Canterbury	198,839	198,236	215,220	-0.3	8.6	3,424,052	2,862,554	3,034,155	-16.4	6.0
Queenstown	246,134	263,648	289,891	7.1	10.0	2,412,355	2,489,485	2,675,148	3.2	7.5
Wellington	200,804	171,687	191,235	-14.5	11.4	2,337,790	2,355,097	2,418,641	0.7	2.7
Rotorua	135,907	122,468	133,382	-9.9	8.9	1,723,813	1,697,936	1,750,662	-1.5	3.1
Dunedin	64,944	54,460	55,051	-16.1	1.1	839,239	831,377	793,591	-0.9	-4.5

NEW ZEALAND VISITOR ACTIVITY

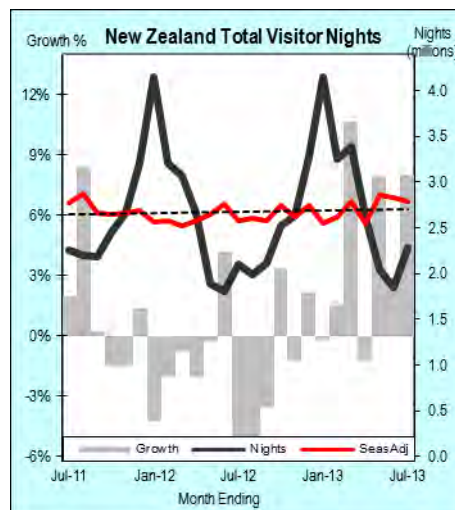
- **Market Share**

- For the **month** of July 2013, Auckland visitor nights accounted for 22% of nights, Queenstown for 13%, Canterbury for 9%, Wellington for 8%, Rotorua for 6%, Dunedin for 2% and the other RTOs collectively for the remaining 40%.
- For the **year** ending July 2013, Auckland visitor nights accounted for 21% of nights, Canterbury for 9%, Queenstown and Wellington for 8% each, Rotorua for 5%, Dunedin for 3% and the other RTOs collectively for the remaining 46%.



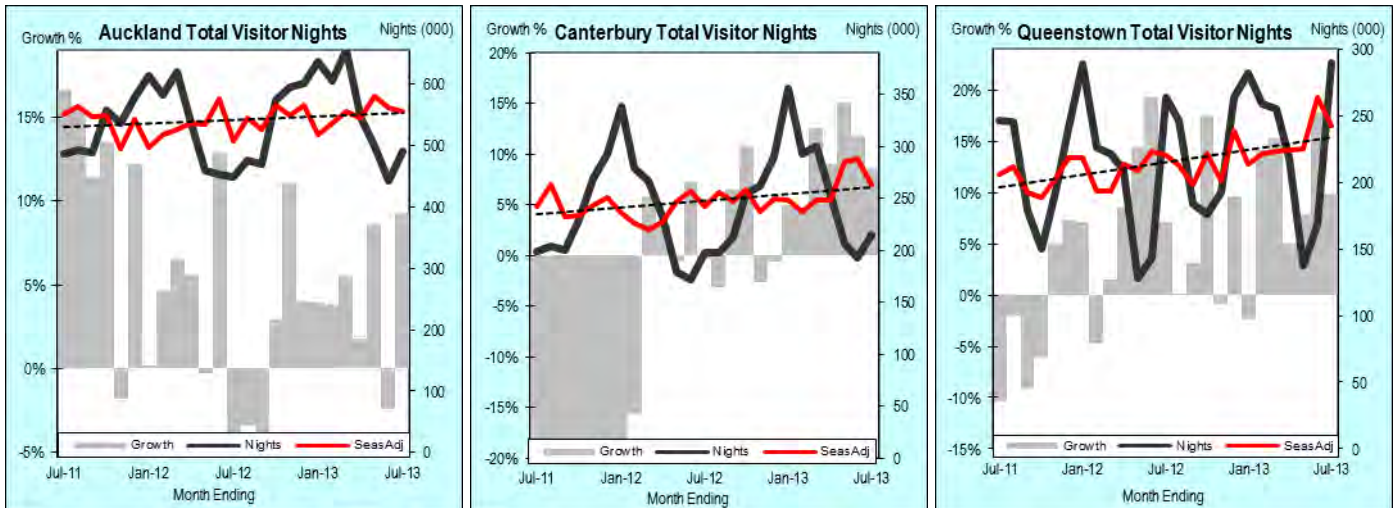
- **Trends & Patterns**

- 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 13 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted visitor nights.

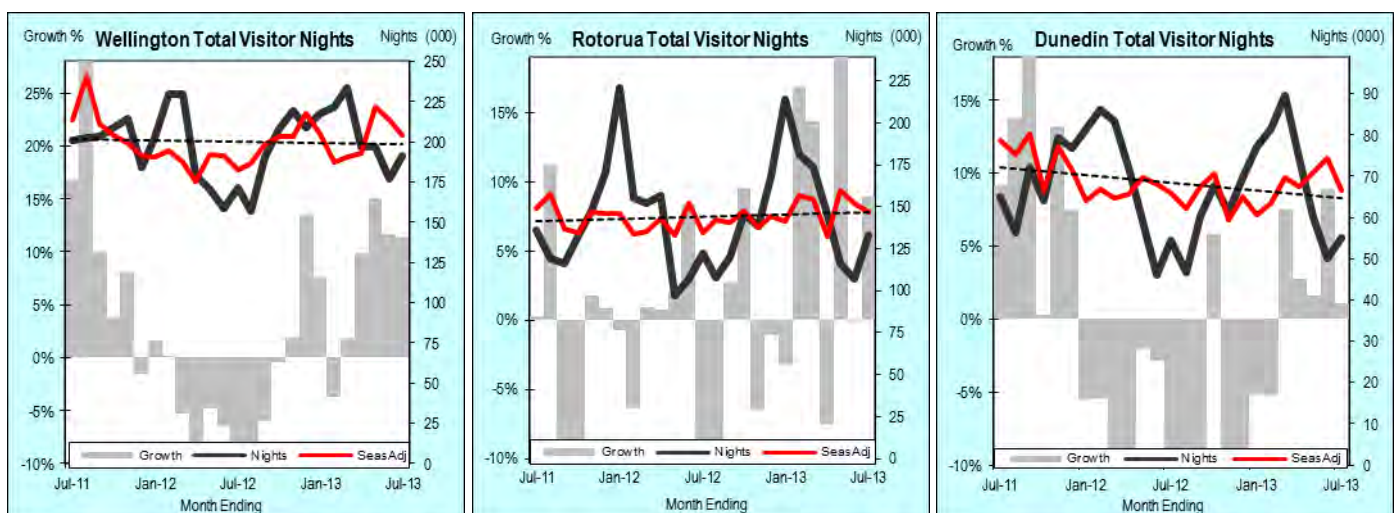


NEW ZEALAND VISITOR ACTIVITY

- 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 19 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 positive growth in 12 of the most recent 16 months, following a period of negative growth, and overall has resulted in an upward 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 positive growth in 18 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 **Wellington**, 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 a downward 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 positive growth in 14 of the 25 graphed months, overall has resulted in an upward 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 negative growth in 13 of the 25 graphed months, and overall has resulted in a downward trend in seasonally adjusted visitor nights.



• Data Sources

Statistics New Zealand – Commercial Accommodation Monitor

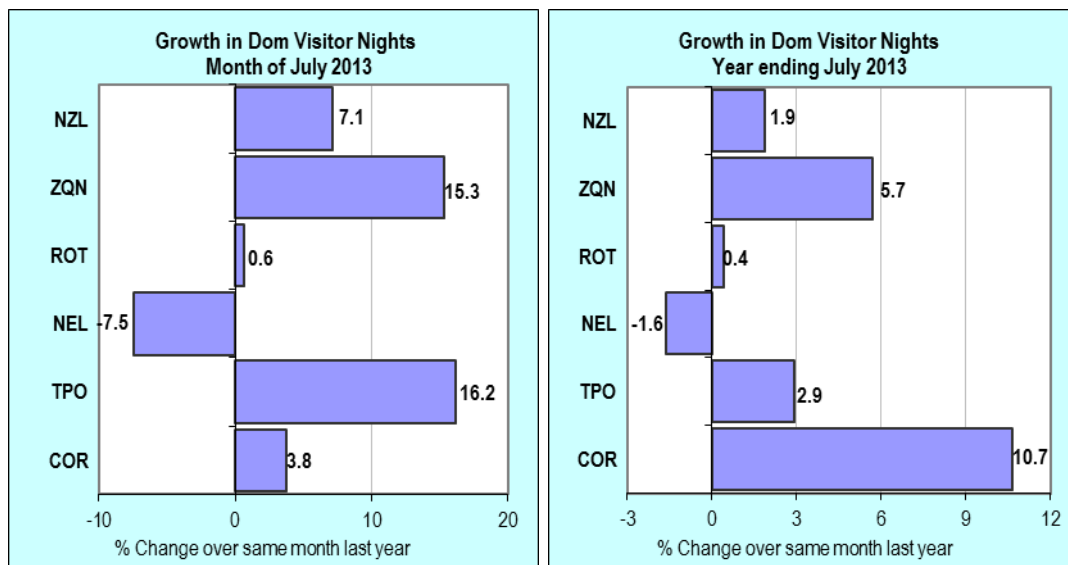
NEW ZEALAND VISITOR ACTIVITY

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 July 2013 there was a 7.1% increase in domestic visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Taupo (up 16.2%) and the least growth was in Nelson (down 7.5%).
- For the **year** ending July 2013, there was a 1.9% increase in domestic visitor nights nationwide on the previous year – the greatest growth in visitor nights was in Coromandel (up 10.7%) and the least growth was in Nelson (down 1.6%).



• Summary Indicators

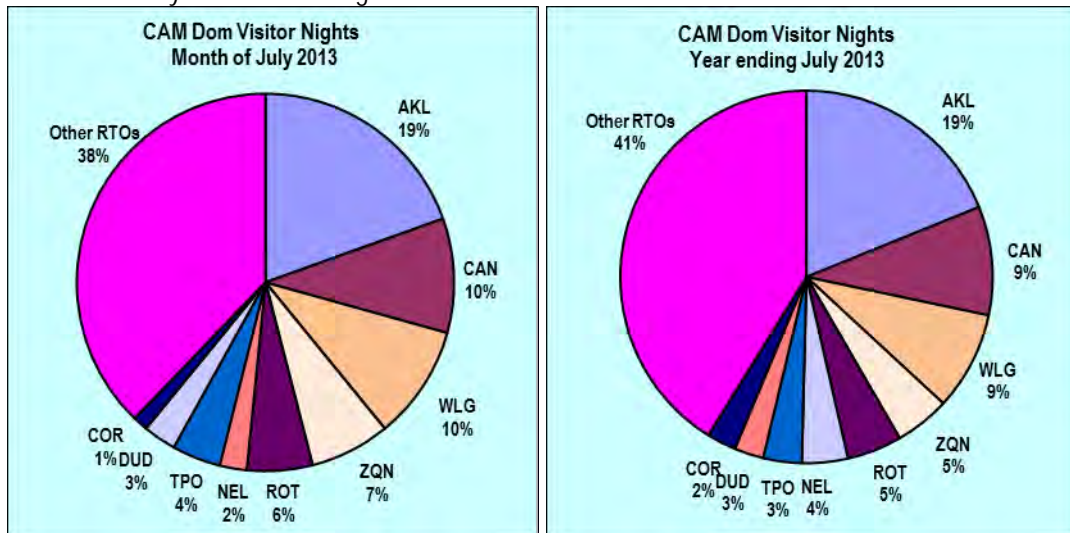
- For the **month** of July 2013, there were 1,468,100 domestic visitor nights nationwide, up 97,823 nights or 7.1% on the previous year – visitor nights spent in Queenstown up 15.3% to 100,977 nights, Rotorua up 0.6% to 82,432 nights, Nelson down 7.5% to 33,998 nights, Taupo up 16.2% to 61,261 nights and Coromandel up 3.8% to 19,077 nights.
- For the **year** ending July 2013, there were 19,375,472 domestic visitor nights nationwide, up 356,152 nights or 1.9% on the previous year – visitor nights spent in Queenstown up 5.7% to 926,745 nights, Rotorua up 0.4% to 924,654 nights, Nelson down 1.6% to 771,927 nights, Taupo up 2.9% to 646,437 nights and Coromandel up 10.7% to 493,500 nights.

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
NZ Dom Visitor	1,497,887	1,370,277	1,468,100	-8.5	7.1	19,044,301	19,019,320	19,375,472	-0.1	1.9
Queenstown	82,198	87,571	100,977	6.5	15.3	765,986	876,675	926,745	14.5	5.7
Rotorua	92,854	81,905	82,432	-11.8	0.6	942,545	920,672	924,654	-2.3	0.4
Nelson	41,498	36,740	33,998	-11.5	-7.5	790,555	784,592	771,927	-0.8	-1.6
Taupo	57,425	52,742	61,261	-8.2	16.2	654,357	628,126	646,437	-4.0	2.9
Coromandel	17,971	18,382	19,077	2.3	3.8	439,254	445,892	493,500	1.5	10.7

NEW ZEALAND VISITOR ACTIVITY

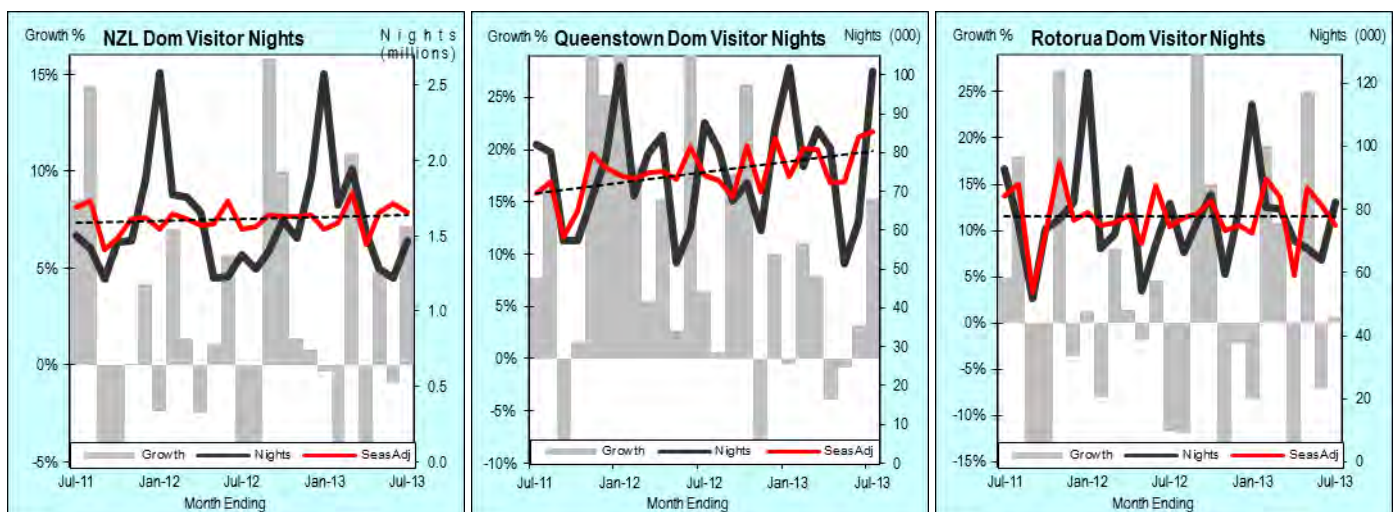
- **Market Share**

- For the **month** of July 2013, Auckland accounted for 19% of domestic visitor nights, Canterbury and Wellington for 10% each, Queenstown for 7%, Rotorua for 6%, Taupo for 4%, Dunedin for 3%, Nelson for 2%, Coromandel for 1%, and the other RTOs collectively for the remaining 38%.
- For the **year** ending July 2013, Auckland accounted for 19% of domestic visitor nights, Canterbury and Wellington for 9% each, Queenstown and Rotorua for 5% each, Nelson for 4%, Taupo and Dunedin for 3% each, Coromandel for 2%, and the other RTOs collectively for the remaining 41%.



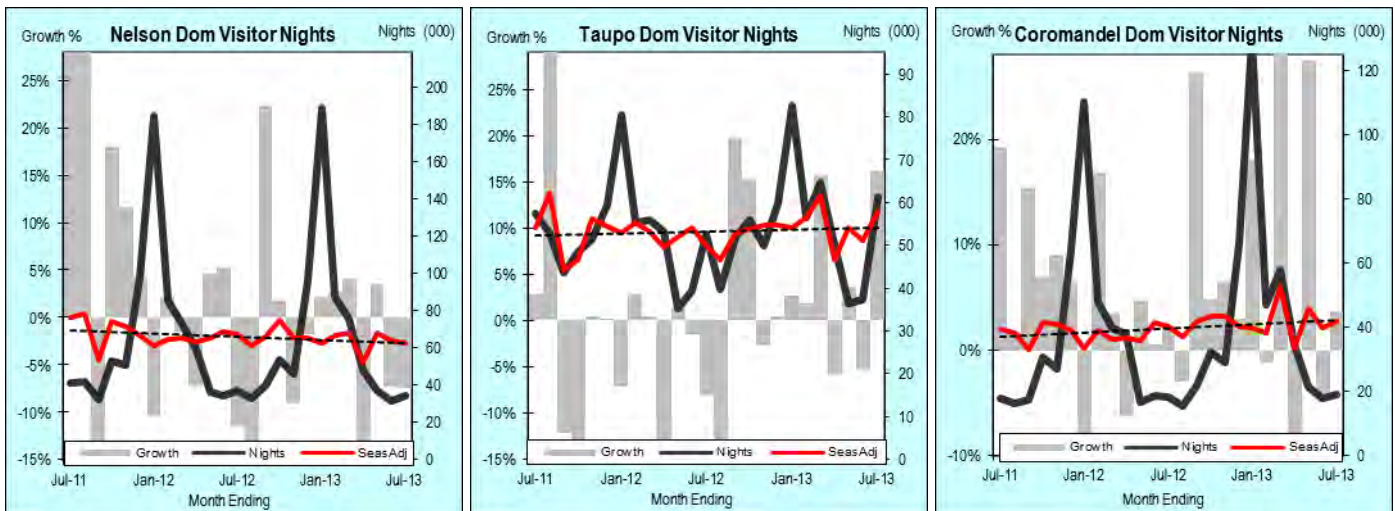
- **Trends & Patterns**

- 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 15 of the 25 graphed months, 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 **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 20 of the 25 graphed months, 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 mixed growth over the 25 graphed months, and overall has resulted in a static trend in seasonally adjusted domestic visitor nights.



NEW ZEALAND VISITOR ACTIVITY

- 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 mixed growth over the 25 graphed months, 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 **Taupo**, 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 mostly negative 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 **Coromandel**, where peaks occur in the summer season and troughs in the winter – the graphed period shows positive growth in 19 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted domestic visitor nights.



DOMESTIC Visitor Night Growth Benchmarking – Month of July 2013

	All NZ	Rotorua	Your Biz	Example
Step 1. Enter YOUR domestic visitor nights for July 2013	1,468,100	82,432		550
Step 2. Enter YOUR domestic visitor nights for July 2012	1,370,277	81,905		500
Step 3. Subtract Step 2 from Step 1 .	97,823	527		50
Step 4. Divide Step 3 by Step 2 .	0.071	0.006		0.100
Step 5. Multiply Step 4 by 100 = Domestic Visitor Night growth	7.1%	0.6%	%	10.0%

Eg. An accommodation provider that had 550 domestic visitor nights for the month of July 2013 had a 10.0% increase in domestic visitor nights over the 500 domestic visitor nights for July 2012. The 10.0% positive growth in domestic visitor nights at this accommodation provider was better than both the average growth in domestic visitor nights of Rotorua accommodation providers (+0.6%), and the average growth in domestic visitor nights of New Zealand accommodation providers (+7.1%).

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

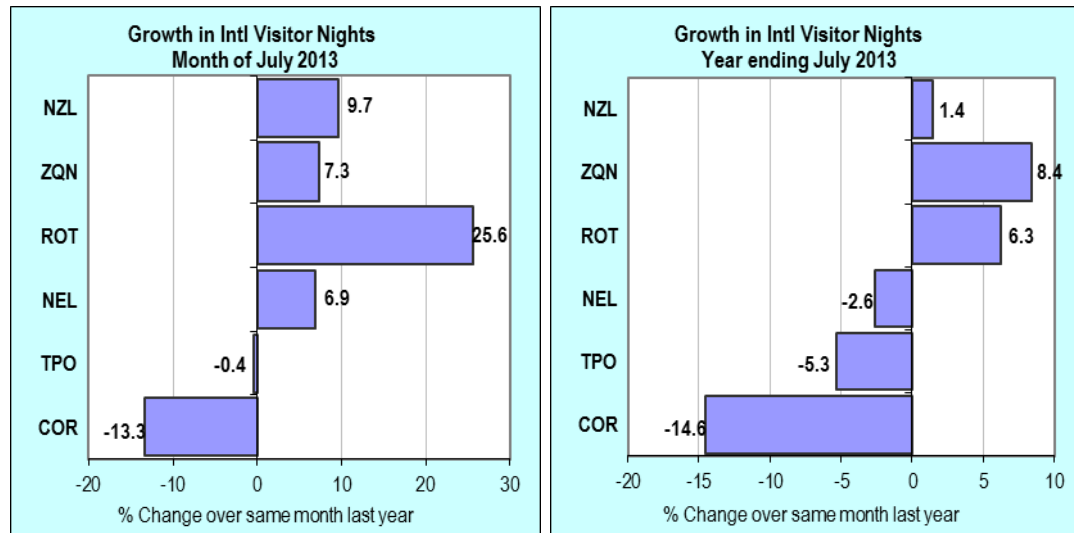
NEW ZEALAND VISITOR ACTIVITY

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 July 2013, there was a 9.7% increase in international visitor nights nationwide on the previous year – the greatest growth in international visitor nights was in Rotorua (up 25.6%) and the least growth was in Coromandel (down 13.3%).
- For the **year** ending July 2013, there was a 1.4% increase in international visitor nights nationwide on the previous year – the greatest growth in international visitor nights was in Queenstown (up 8.4%) and the least growth was in Coromandel (down 14.6%).



• Summary Indicators

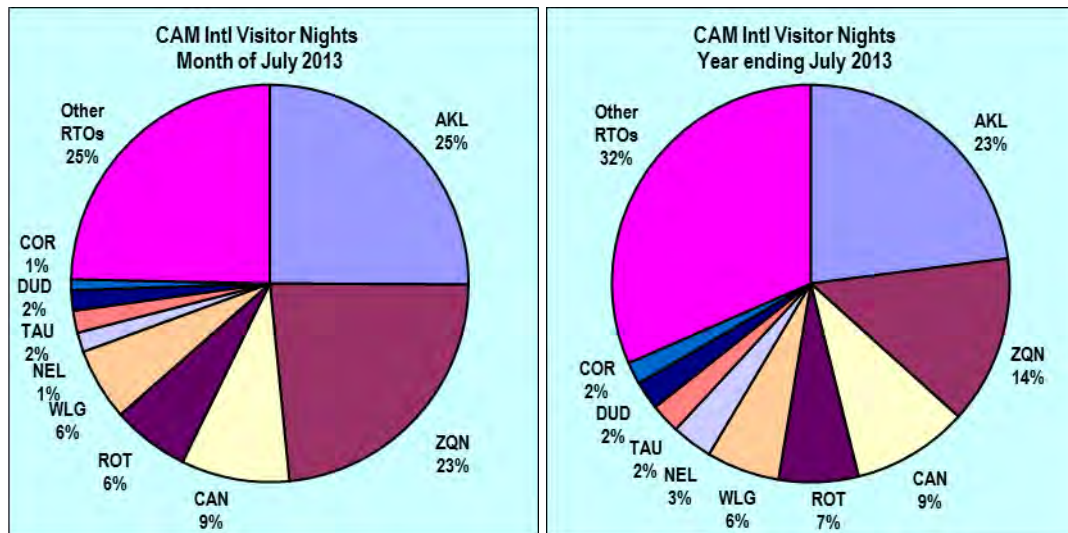
- For the **month** of July 2013, there were 809,507 international visitor nights nationwide, up 71,370 nights or 9.7% on the previous year – visitor nights spent in Queenstown up 7.3% to 188,914 nights, Rotorua up 25.6% to 50,950 nights, Nelson up 6.9% to 12,869 nights, Taupo down 0.4% to 14,529 nights and Coromandel down 13.3% to 7,102 nights.
- For the **year** ending July 2013, there were 12,763,220 international visitor nights nationwide, up 181,623 nights or 1.4% on the previous year – visitor nights spent in Queenstown up 8.4% to 1,748,405 nights, Rotorua up 6.3% to 826,010 nights, Nelson down 2.6% to 424,991 nights, Taupo down 5.3% to 309,706 nights and Coromandel down 14.6% to 228,203 nights.

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
NZ Intl Visitor Nights	761,243	738,137	809,507	-3.0	9.7	12,830,201	12,581,597	12,763,220	-1.9	1.4
Queenstown	163,936	176,078	188,914	7.4	7.3	1,646,369	1,612,810	1,748,405	-2.0	8.4
Rotorua	43,052	40,563	50,950	-5.8	25.6	781,268	777,266	826,010	-0.5	6.3
Nelson	13,975	12,036	12,869	-13.9	6.9	450,386	436,314	424,991	-3.1	-2.6
Taupo	15,548	14,594	14,529	-6.1	-0.4	294,562	326,994	309,706	11.0	-5.3
Coromandel	7,906	8,192	7,102	3.6	-13.3	250,125	267,087	228,203	6.8	-14.6

NEW ZEALAND VISITOR ACTIVITY

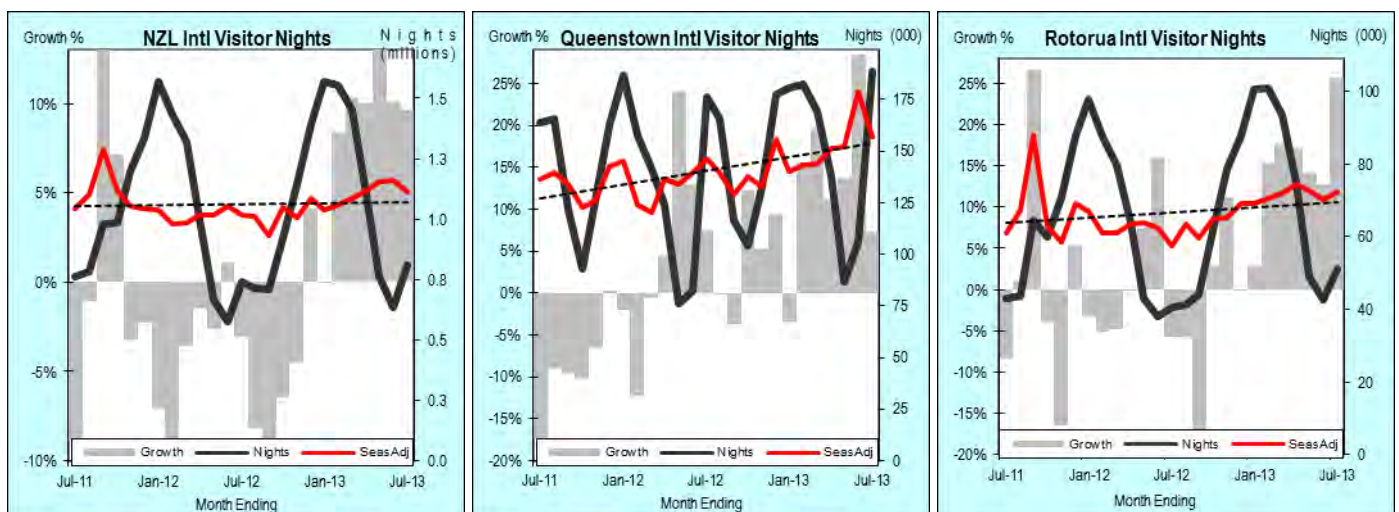
Market Share

- For the **month** of July 2013, Auckland accounted for 25% of international visitor nights, Queenstown for 23%, Canterbury for 9%, Rotorua and Wellington for 6% each, Taupo and Dunedin for 2% each, Nelson and Coromandel for 1%, and the other RTOs collectively for the remaining 25%.
- For the **year** ending July 2013, Auckland accounted for 23% of international visitor nights, Queenstown for 14%, Canterbury for 9%, Rotorua for 7%, Wellington for 6%, Nelson for 3%, Taupo, Dunedin and Coromandel for 2% each, and the other RTOs collectively for the remaining 32%.



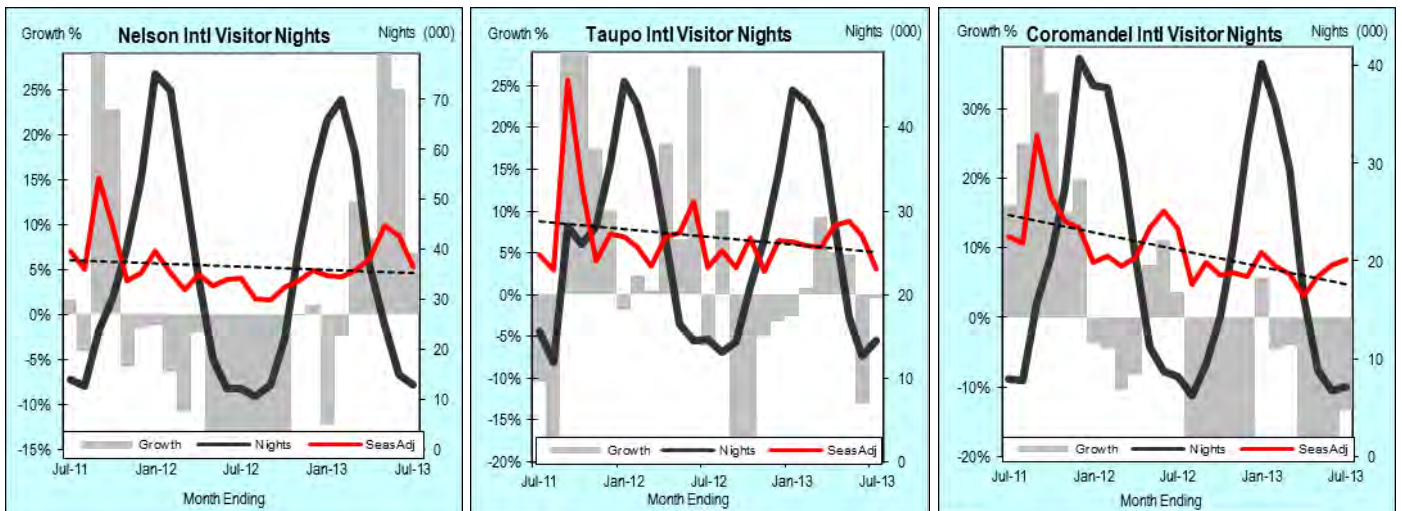
Trends & Patterns

- 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 positive growth in seven of the most recent eight months, following a period of negative growth, overall has resulted in an upward 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 positive growth in 13 of the most recent 16 months, following a period of mostly 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 **Rotorua**, where peaks occur in the summer season and troughs in the winter season – the graphed period shows positive growth in 11 of the most recent 15 months, following a period of mostly negative growth, and overall has resulted in an upward 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 negative growth in 16 of the 25 graphed 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 **Taupo**, where peaks occur in the summer season and troughs in the winter – the graphed period shows negative growth in seven of the most recent 11 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 **Coromandel**, where peaks occur in the summer season and troughs in the winter – the graphed period shows negative growth in 15 of the 25 graphed months, and overall has resulted in a downward trend in seasonally adjusted international visitor nights.



INTERNATIONAL Visitor Night Growth Benchmarking – Month of July 2013

	All NZ	Rotorua	Your Biz	Example
Step 1. Enter YOUR international visitor nights for July 2013	809,507	50,950		520
Step 2. Enter YOUR international visitor nights for July 2012	738,137	40,563		500
Step 3. Subtract Step 2 from Step 1.	71,370	10,387		20
Step 4. Divide Step 3 by Step 2.	0.097	0.256		0.040
Step 5. Multiply Step 4 by 100 = International Visitor Night growth	9.7%	25.6%	%	4.0%

Eg. An accommodation provider that had 520 international visitor nights for the month of July 2013 had a 4.0% increase in international visitor nights over the 500 international visitor nights for July 2012. The 4.0% positive growth in international visitor nights at this accommodation provider was poorer than both the average growth in international visitor nights of Rotorua accommodation providers (+25.6%), and the average growth in international visitor nights of New Zealand accommodation providers (+9.7%).

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

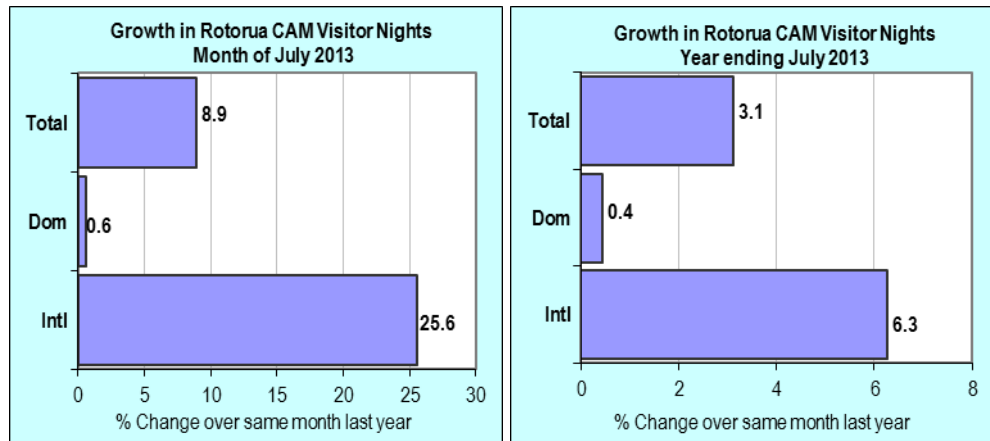
Rotorua Commercial Accommodation Monitor (CAM)

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 July 2013, there was an 8.9% increase in visitor nights on the previous year – visitor nights increased for both domestic visitors (up 0.6%) and for international visitors (up 25.6%).
- For the **year** ending July 2013, there was a 3.1% increase in visitor nights on the previous year – visitor nights increased for both domestic visitors (up 0.4%) and for international visitors (up 6.3%).



- Summary Indicators

- For the **month** of July 2013, there were 72,814 visitor arrivals, up 233 arrivals or 0.3% on the previous year – those 72,814 visitors stayed an average 1.83 nights (up 8.6%) for a collective 133,382 visitor nights (up 8.9%).
 - Domestic nights were up 0.6% to 82,432 nights
 - International nights were up 25.6% to 50,950 nights
- For the **year** ending July 2013, there were 1,011,744 visitor arrivals, up 3,338 or 0.3% on the previous year - those 1,011,744 visitors stayed an average 1.73 nights (up 2.8%) for a collective 1,750,662 visitor nights (up 3.1%).
 - Domestic nights were up 0.4% to 924,654 nights
 - International nights were up 6.3% to 826,010 nights

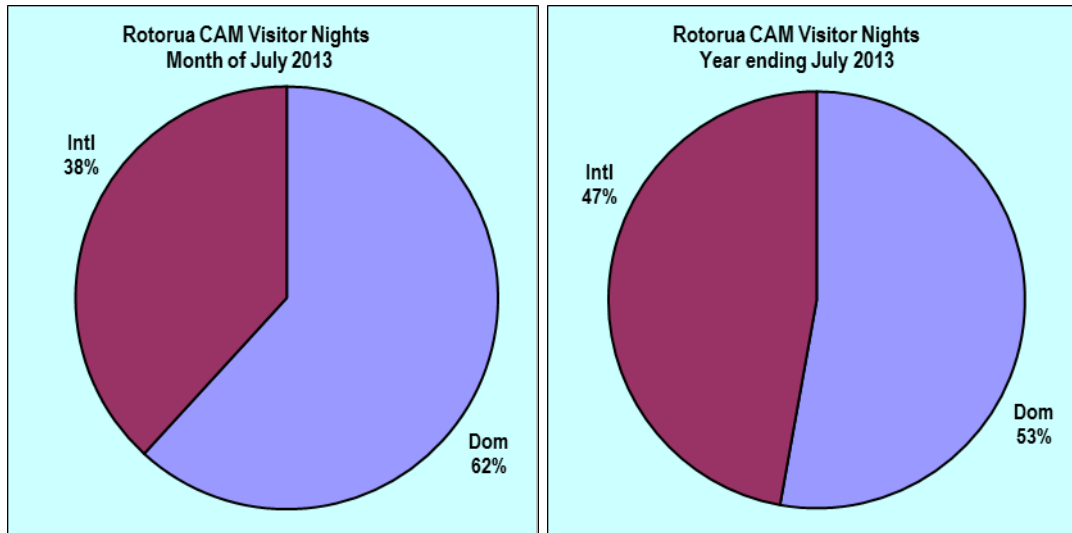
	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
Visitor Arrivals	77,154	72,581	72,814	-5.9	0.3	970,959	1,008,406	1,011,744	3.9	0.3
Length of Stay	1.76	1.69	1.83	-4.2	8.6	1.78	1.68	1.73	-5.2	2.8
Visitor Nights - Total	135,907	122,468	133,382	-9.9	8.9	1,723,813	1,697,936	1,750,662	-1.5	3.1
Domestic	92,854	81,905	82,432	-11.8	0.6	942,545	920,672	924,654	-2.3	0.4
International	43,052	40,563	50,950	-5.8	25.6	781,268	777,266	826,010	-0.5	6.3

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

ROTORUA VISITOR ACTIVITY

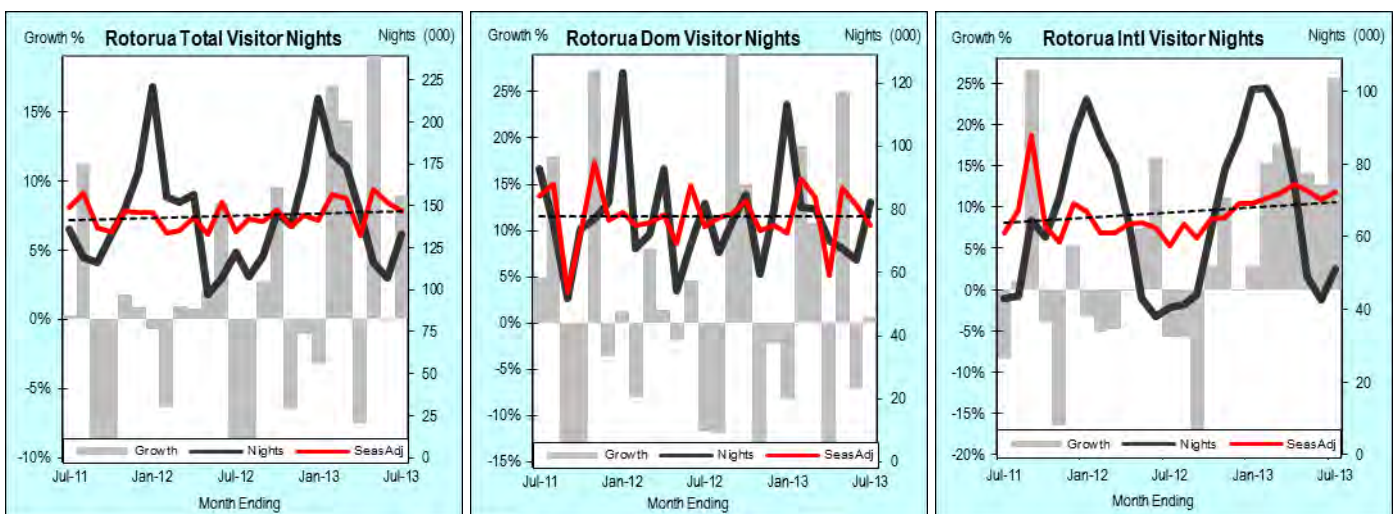
- **Market Segmentation**

- For the **month** of July 2013, domestic visitor nights accounted for 62% of visitor nights, and international visitors for the remaining 38% of visitor nights.
- For the **year** ending July 2013, 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 positive growth in 14 of the 25 graphed months, overall has resulted in an upward 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 mixed growth over the 25 graphed months, and overall has resulted in a static 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 positive growth in 11 of the most recent 15 months, following a period of mostly negative growth, and overall has resulted in an upward trend in seasonally adjusted international visitor nights.



- **Data Sources**

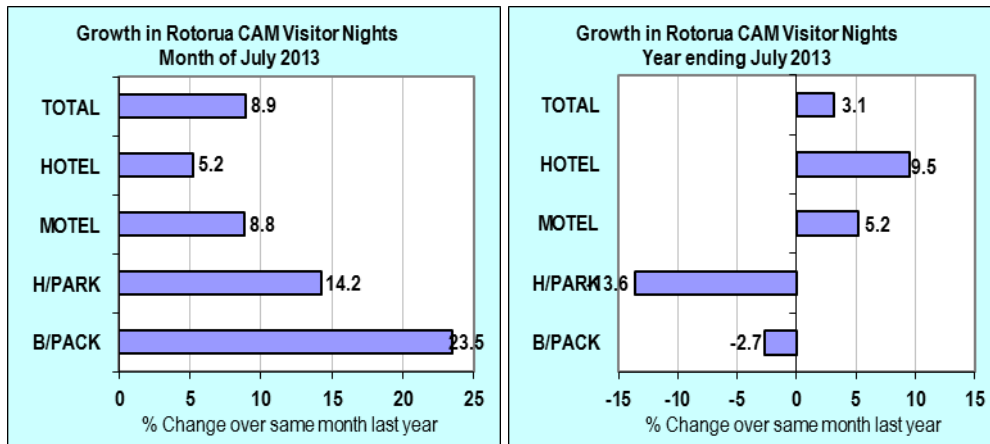
- Statistics New Zealand – Commercial Accommodation Monitor

ROTORUA VISITOR ACTIVITY

Rotorua CAM Sector Analysis

• Latest Performance

- For the **month** of July 2013, there was an 8.9% increase in visitor nights on the previous year – the backpacker sector had the greatest growth (up 23.5%) and the hotel sector had the least growth (up 5.2%).
- For the **year** ending July 2013, there was a 3.1% increase in Rotorua visitor nights on the previous year – the hotel sector had the greatest growth (up 9.5%) and the holiday park sector had the least growth (down 13.6%).



• Summary Indicators

- For the **month** of July 2013, there were 133,382 visitor nights spent in Rotorua commercial accommodation, up 10,914 nights or 8.9% on the previous year.
 - Hotel nights were up 5.2% to 58,217 nights
 - Motel nights were up 8.8% to 49,761 nights
 - Holiday park nights were up 14.2% to 12,450 nights
 - Backpacker nights were up 23.5% to 12,953 nights
- For the **year** ending July 2013, there were 1,750,662 visitor nights spent in Rotorua commercial accommodation, up 52,726 nights or 3.1% on the previous year.
 - Hotel nights were up 9.5% to 762,139 nights
 - Motel nights were up 5.2% to 585,715 nights
 - Holiday park nights were down 13.6% to 240,538 nights
 - Backpacker nights were down 2.7% to 162,271 nights

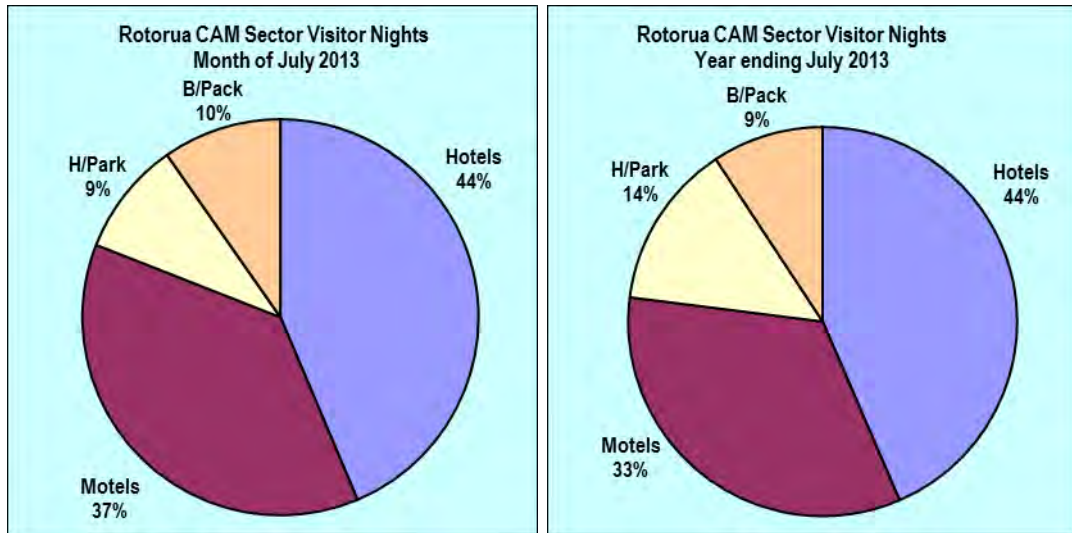
ROTORUA	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
Total Visitor Nights	135,907	122,468	133,382	-9.9	8.9	1,723,813	1,697,936	1,750,662	-1.5	3.1
Hotel	59,164	55,342	58,217	-6.5	5.2	724,827	696,044	762,139	-4.0	9.5
Motel	47,368	45,733	49,761	-3.5	8.8	543,151	556,656	585,715	2.5	5.2
Holiday Park	15,527	10,900	12,450	-29.8	14.2	283,517	278,431	240,538	-1.8	-13.6
Backpackers	13,848	10,492	12,953	-24.2	23.5	172,322	166,804	162,271	-3.2	-2.7

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

ROTORUA VISITOR ACTIVITY

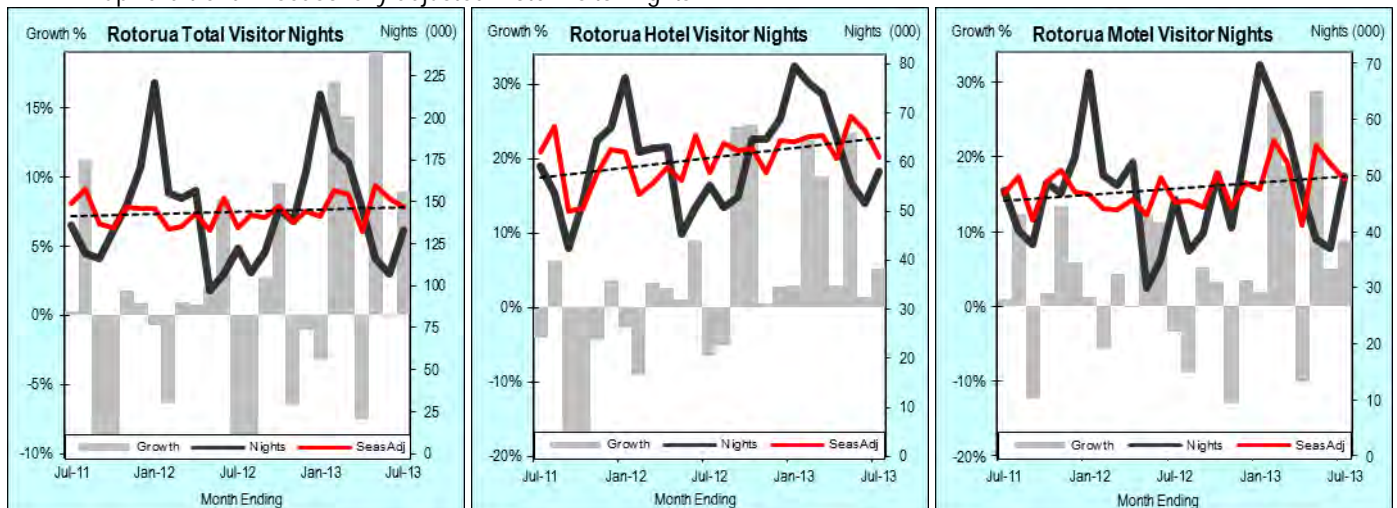
- Market Segmentation

- For the month of July 2013, hotels accounted for 44% of Rotorua visitor nights, motels for 37%, backpackers for 10% and holiday parks for 9%.
- For the year ending July 2013, hotels accounted for 44% of Rotorua visitor nights, motels for 33%, holiday parks for 14% and backpackers for 9%.



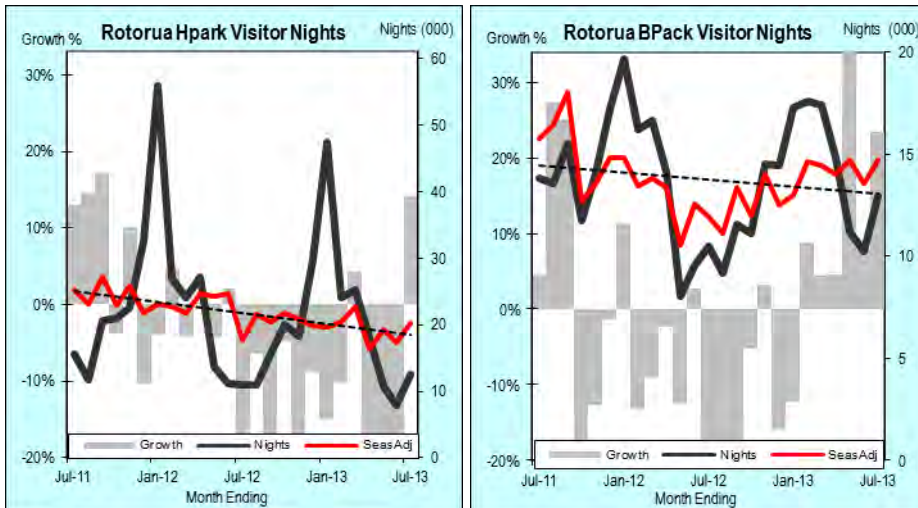
- Trends & Patterns

- 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 positive growth in 14 of the 25 graphed months, overall has resulted in an upward 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 positive growth in 15 of the most recent 17 months, following a period of mostly negative growth, and overall has resulted in an upward 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 positive growth in 18 of the 25 graphed months, 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 negative growth in 11 of the most recent 13 months, following a period of mixed growth, and overall has resulted in a downward 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 13 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 July 2013

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
Step 1. Enter YOUR visitor nights for July 2013					1,650
Step 2. Enter YOUR visitor nights for July 2012					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	5.2%	8.8%	14.2%	23.5%	8.8%
NZ Avg Visitor Night growth	10.0%	4.4%	5.6%	14.6%	4.4%

Eg. A motel that had 1650 visitor nights for the month of July 2013 had a 10.0% increase in visitor nights over the 1500 visitor nights for July 2012. The 10.0% positive growth in visitor nights at this motel was better than both the average growth in visitor nights of Rotorua motels (+8.8%), and the average growth in visitor nights of New Zealand motels (+4.4%).

- **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 July 2013, there were 190,619 stay units available in Rotorua commercial accommodation, up 2,945 stay units or 1.6% on the previous year. Of the 190,619 available stay units, 63,940 units were occupied (up 4.6%), which resulted in a 33.5% occupancy rate.
 - Hotel occupancy was up from 50.2% to 50.9%
 - Motel occupancy was up from 44.2% to 44.4%
 - Holiday Park occupancy was up from 10.6% to 10.8%
 - Backpacker occupancy was up from 21.7% to 23.9%
- For the **year ending** July 2013, there were 2,232,531 stay units available in Rotorua commercial accommodation, up 13,045 stay units or 0.6% on the previous year. Of the 2,232,531 available stay units, 916,686 units were occupied (up 0.7%), which resulted in a 41.1% occupancy rate.
 - Hotel occupancy was up from 58.0% to 61.2%
 - Motel occupancy was up from 49.4% to 50.3%
 - Holiday Park occupancy was unchanged at 19.0%
 - Backpacker occupancy was down from 38.5% to 28.8%

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
All Accommodation										
Stay Units Available	188,821	187,674	190,619	-0.6	1.6	2,242,669	2,219,486	2,232,531	-1.0	0.6
Stay Units Occupied	72,189	61,123	63,940	-15.3	4.6	924,564	910,038	916,686	-1.6	0.7
Occupancy	38.2%	32.6%	33.5%	-5.7 pts	1.0 pts	41.2%	41.0%	41.1%	-0.2 pts	0.1 pts
Hotel										
Stay Units Available	55,149	55,180	56,978	0.1	3.3	671,789	651,446	667,460	-3.0	2.5
Stay Units Occupied	31,513	27,676	29,020	-12.2	4.9	402,639	377,866	408,300	-6.2	8.1
Occupancy	57.1%	50.2%	50.9%	-7.0 pts	0.8 pts	59.9%	58.0%	61.2%	-1.9 pts	3.2 pts
Motel										
Stay Units Available	42,997	43,059	43,276	0.1	0.5	510,413	509,060	509,286	-0.3	0.0
Stay Units Occupied	20,869	19,033	19,231	-8.8	1.0	243,449	251,510	256,377	3.3	1.9
Occupancy	48.5%	44.2%	44.4%	-4.3 pts	0.2 pts	47.7%	49.4%	50.3%	1.7 pts	0.9 pts
Holiday Park										
Stay Units Available	58,373	45,136	45,136	-22.7	0.0	680,137	652,481	531,440	-4.1	-18.6
Stay Units Occupied	6,905	4,780	4,874	-30.8	2.0	120,412	124,158	100,938	3.1	-18.7
Occupancy	11.8%	10.6%	10.8%	-1.2 pts	0.2 pts	17.7%	19.0%	19.0%	1.3 pts	0.0 pts
Backpackers										
Stay Units Available	32,302	44,299	45,229	37.1	2.1	380,330	406,499	524,345	6.9	29.0
Stay Units Occupied	12,902	9,634	10,815	-25.3	12.3	158,066	156,504	151,072	-1.0	-3.5
Occupancy	39.9%	21.7%	23.9%	-18.2 pts	2.2 pts	41.6%	38.5%	28.8%	-3.1 pts	-9.7 pts

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

ROTORUA VISITOR ACTIVITY

Occupancy Benchmarking by Sector – Month of July 2013

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
Step 1. Enter YOUR stay units <u>occupied</u> for July 2013					430
Step 2. Enter YOUR stay units <u>available</u> for July 2013					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	50.9%	44.4%	10.8%	23.9%	44.4%
NZ Avg Occupancy	54.6%	46.7%	8.0%	34.4%	46.7%

Eg. A motel that had 25 rooms/units available on the last day of the month had 775 room nights available for the month of July 2013 (ie. 25 rooms multiplied by 31 days). If 430 of the 775 available room nights were occupied during the month of July 2013, that motel had an occupancy rate of 55.5%, which was better than both the average occupancy of Rotorua motels (44.4%), and the average occupancy of New Zealand motels (46.7%).

Market Share of Occupied Stay Units by Sector – Month of July 2013

	Hotel	Motel	Holiday Park	Back-packers	Motel Example
No. of Establishments	21	79	11	13	79
Step 1. Enter YOUR stay units <u>occupied</u> for July 2013					430
Step 2. Total Rotorua stay units <u>occupied</u> for July 2013	29,020	19,231	4,874	10,815	19,231
Step 3. Divide Step 1 by Step 2 .					0.022
Step 4. Multiply Step 3 by 100 = Market Share	%	%	%	%	2.2%
Rotorua Avg Market Share	4.8%	1.3%	9.1%	7.7%	1.3%

Eg. A motel that had 430 occupied rooms for the month of July 2013 had a 2.2% market share of the 19,231 occupied stay units in Rotorua motels, which was more than the average market share of Rotorua motels (1.3%).

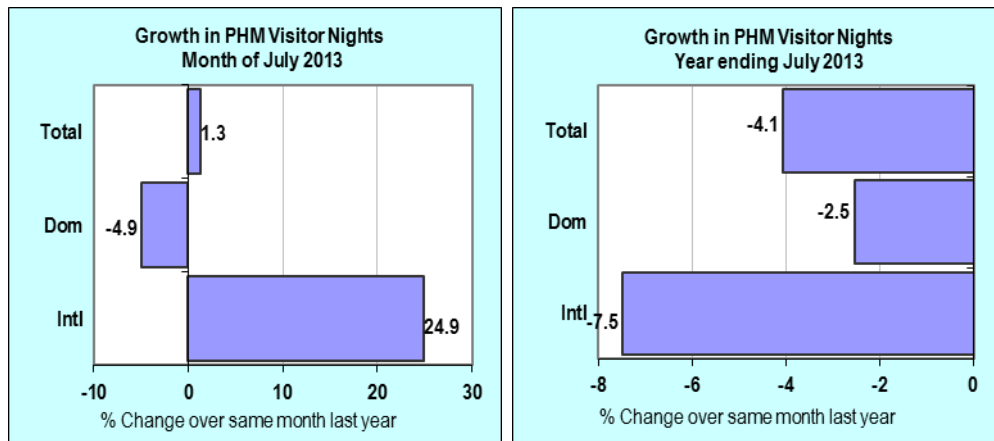
- Data Sources
 - Statistics New Zealand – Commercial Accommodation Monitor

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 July 2013, there was a 1.3% increase in visitor nights on the previous year – visitor nights decreased for domestic visitors (down 4.9%) and increased for international visitors (up 24.9%).
- For the **year ending** July 2013, there was a 4.1% decrease in visitor nights on the previous year – visitor nights decreased for both domestic visitors (down 2.5%) and for international visitors (down 7.5%).



• Summary Indicators

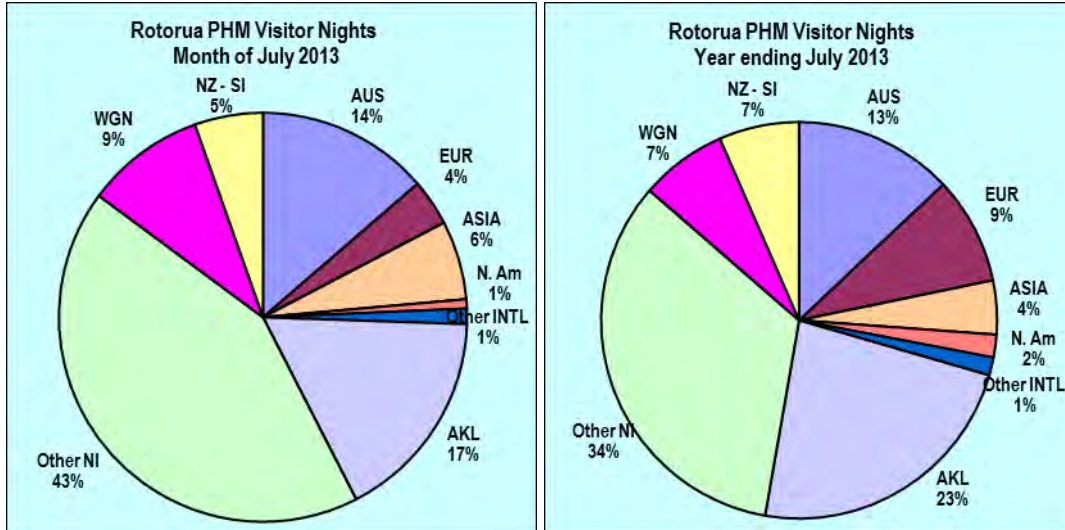
- For the **month** of July 2013, there were 25,685 visitor arrivals, up 192 arrivals or 0.8% on the previous year – those 25,685 visitors stayed an average 3.41 nights (up 0.5%) for a collective 87,464 visitor nights (up 1.3%).
 - Domestic nights were down 4.9% to 65,126 nights
 - International nights were up 24.9% to 22,338 nights
- For the **year ending** July 2013, there were 353,966 visitor arrivals, down 14,853 arrivals or 4.0% on the previous year – those 353,966 visitors stayed an average 3.75 nights (no change or 0.0%) for a collective 1,327,950 visitor nights (down 4.1%).
 - Domestic nights were down 2.5% to 936,568 nights
 - International nights were down 7.5% to 391,382 nights

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
Visitor Arrivals	27,439	25,493	25,685	-7.1	0.8	375,475	368,819	353,966	-1.8	-4.0
Length of Stay	3.50	3.39	3.41	-3.1	0.5	3.89	3.75	3.75	-3.5	0.0
Visitor Nights - Total	95,924	86,357	87,464	-10.0	1.3	1,460,802	1,384,072	1,327,950	-5.3	-4.1
Domestic	70,786	68,476	65,126	-3.3	-4.9	1,030,122	960,958	936,568	-6.7	-2.5
International	25,138	17,881	22,338	-28.9	24.9	430,680	423,114	391,382	-1.8	-7.5

ROTORUA VISITOR ACTIVITY

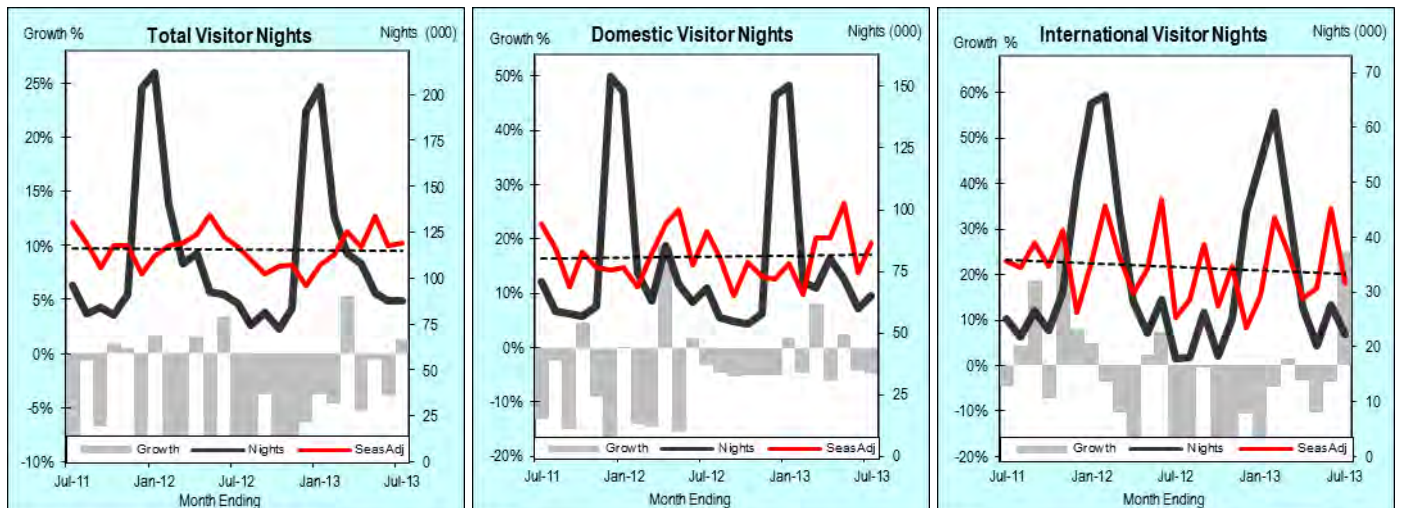
Market Segmentation

- For the **month** of July 2013, domestic visitors accounted for 74% of visitor nights, and international visitors for the remaining 26% of visitor nights.
- For the **year ending** July 2013, domestic visitors accounted for 71% of visitor nights, and international visitors for the remaining 29% 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 18 of the 25 graphed months, 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 positive growth in three of the most recent seven months, 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 in **international** visitor nights, with peaks occurring in the summer season and troughs in the winter – the graphed period shows negative growth in 16 of the 25 graphed months, and overall has resulted in a downward trend in seasonally adjusted visitor nights.



Data Sources

- APR Consultants – Rotorua Private Homes Monitor

Rotorua Attraction & Activities Monitor

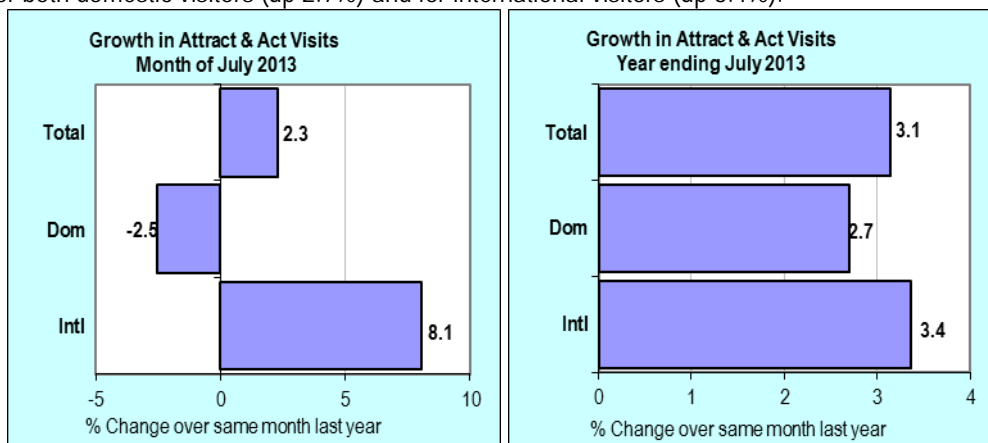
The Rotorua Attraction & Activities Monitor measures visitor activity occurring at 28 popular Rotorua tourism businesses. Each month these businesses submit visitor origin data to APR Consultants who then report the aggregated results in the Rotorua Attraction & Activities Monitor.

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 (ceased trading – proxy return), Off Road NZ, OGO Rotorua, Pure Cruise, River Rats Rafting (merged with Raftabout – modified return), Rotorua Canopy Tours, Rotorua Duck Tours, Te Urewera Treks, Volcanic Air Safaris, Wet 'n' Wild Rafting, Zorb Rotorua

• Latest Performance

- For the **month** of July 2013, there was a 2.3% increase in attraction and activities visits on the previous year – visits decreased for domestic visitors (down 2.5%) and increased for international visitors (up 8.1%).
- For the **year** ending July 2013, there was a 3.1% increase in attraction and activities visits on the previous year – visits increased for both domestic visitors (up 2.7%) and for international visitors (up 3.4%).



• Summary Indicators

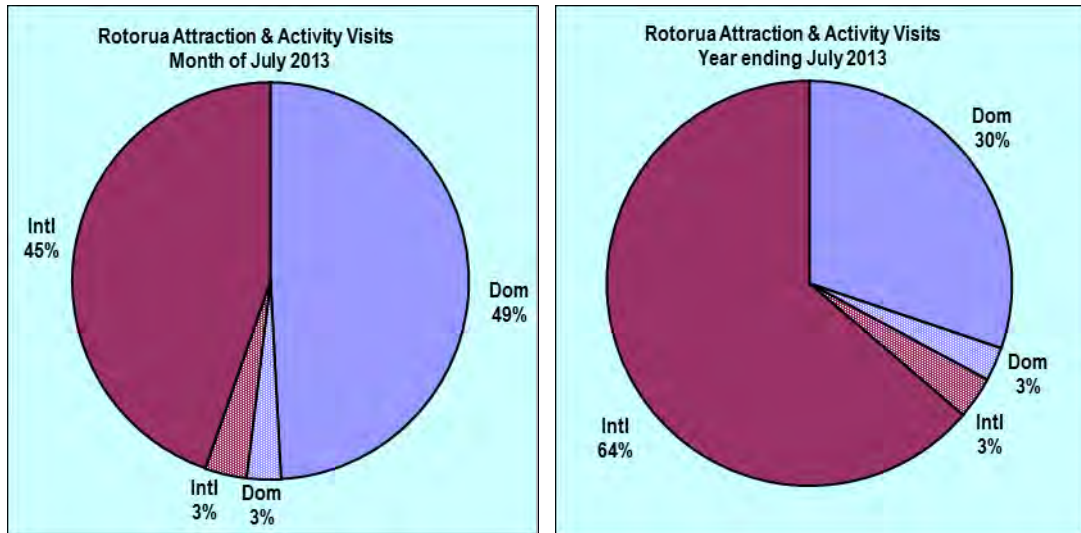
- For the **month** of July 2013, there were 174,792 attraction and activities visits, up 3,909 visits or 2.3% on the previous year – domestic visits decreased 2.5% to 90,780 visits, and international visits increased 8.1% to 84,012 visits.
 - **Attraction** visits increased 2.4% to 163,993 visits - domestic visits decreased 2.0% to 85,923 visits, and international visits increased 7.8% to 78,070 visits.
 - **Activities** visits increased 0.5% to 10,799 visits - domestic visits decreased 11.0% to 4,857 visits, and international visits increased 12.4% to 5,942 visits.
- For the **year** ending July 2013, there were 2,319,326 attraction and activities visits, up 70,658 visits or 3.1% on the previous year – domestic visits increased 2.7% to 762,851 visits, and international visits increased 3.4% to 1,556,475 visits.
 - **Attraction** visits increased 4.2% to 2,178,007 visits - domestic visits increased 4.3% to 700,195 visits, and international visits increased 4.2% to 1,477,812 visits.
 - **Activities** visits decreased 11.3% to 141,319 visits - domestic visits decreased 12.4% to 62,656 visits, and international visits decreased 10.4% to 78,663 visits.

	Month: July			Growth Rate (%)		Year Ended: July			Growth Rate (%)	
	2011	2012	2013	11-12	12-13	2011	2012	2013	11-12	12-13
TOTAL Visits	153,209	170,883	174,792	11.5	2.3	2,086,292	2,248,668	2,319,326	7.8	3.1
Domestic	79,160	93,147	90,780	17.7	-2.5	638,918	742,809	762,851	16.3	2.7
International	74,049	77,736	84,012	5.0	8.1	1,447,374	1,505,859	1,556,475	4.0	3.4
ATTRACTION Visits	138,706	160,140	163,993	15.5	2.4	1,927,919	2,089,418	2,178,007	8.4	4.2
Domestic	72,014	87,690	85,923	21.8	-2.0	574,503	671,313	700,195	16.9	4.3
International	66,692	72,450	78,070	8.6	7.8	1,353,416	1,418,105	1,477,812	4.8	4.2
ACTIVITIES Visits	14,503	10,743	10,799	-25.9	0.5	158,373	159,250	141,319	0.6	-11.3
Domestic	7,146	5,457	4,857	-23.6	-11.0	64,415	71,496	62,656	11.0	-12.4
International	7,357	5,286	5,942	-28.2	12.4	93,958	87,754	78,663	-6.6	-10.4

ROTORUA VISITOR ACTIVITY

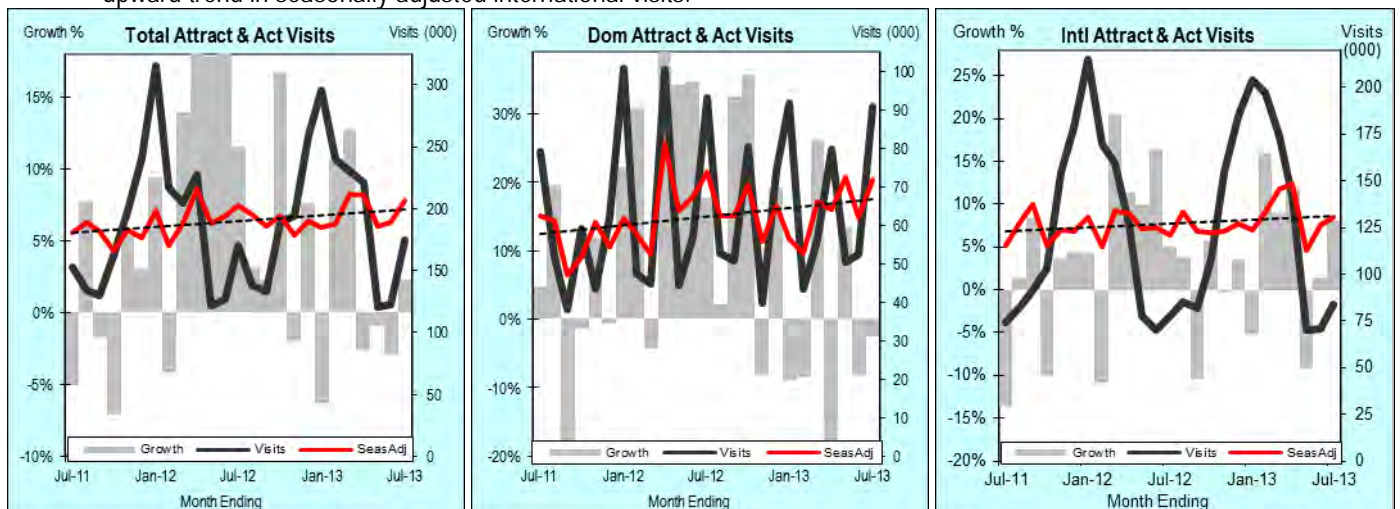
- Market Segmentation**

- For the **month** of July 2013, attraction operators (solid segments) accounted for 94% of visits and activities operators (shaded segments) for the remaining 6% of visits.
 - Domestic visitors (blue segments) accounted for 52% of visits and international visitors (red segments) for the remaining 48% of visits.
- For the **year** ending July 2013, attraction operators (solid segments) accounted for 94% of visits and activities operators (shaded segments) for the remaining 6% 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 positive growth in 16 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted visits.
- There is a pattern alternating between peaks and troughs in **domestic** visits – the graphed period shows positive growth in 15 of the 25 graphed months, 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 positive growth in 18 of the 25 graphed months, and overall has resulted in an upward trend in seasonally adjusted international visits.



ROTORUA VISITOR ACTIVITY

- Rotorua **ATTRACTION** Operator Benchmarking – Month of July 2013

	Total	Domestic	International	Example Total Visitors
Step 1. Enter YOUR visitors for July 2013				13,900
Step 2. Enter YOUR visitors for July 2012				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	2.4%	-2.0%	7.8%	2.4%

Eg. An attraction site that had 13,900 visitors for the month of July 2013 had a 3.0% increase in total visitors over the 13,500 total visitors for July 2012. The 3.0% positive growth in visitors at this attraction site was better than the average growth in total attraction visits of participating Rotorua attraction sites (+2.4%).

- Rotorua **ACTIVITIES** Operator Benchmarking – Month of July 2013

	Total	Domestic	International	Example Total Visitors
Step 1. Enter YOUR visitors for July 2013				950
Step 2. Enter YOUR visitors for July 2012				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	0.5%	-11.0%	12.4%	0.5%

Eg. An activities business that had 950 visitors for the month of July 2013 had a 5.6% increase in total visitors over the 900 total visitors for July 2012. The 5.6% positive growth in visitors at this activities business was better than the average growth in total activities visits of participating Rotorua activities operators (+0.5%).

- 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 Business, Innovation & Employment - <http://www.med.govt.nz/sectors-industries/tourism/tourism-research-data>
- Statistics New Zealand - www.statistics.govt.nz
- Destination Rotorua Marketing - www.rotoruaNZ.com

The tourism section of the Ministry of Business, Innovation & Employment 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 Business, Innovation & Employment, 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 '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 Business, Innovation & Employment tourism strategy group.

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.