

Tourism 2025 Scorecard - how are we tracking?

Chris Roberts, Chief Executive, TIA

A year ago...

Industry Top of Mind Issues

1. Infrastructure
2. Visitor Behaviour – Freedom camping
3. People and Skills
4. Funding
5. Connectivity

Source: TIA State of the Industry Report 2017

A year ago... and now

Industry Top of Mind Issues: 2017	2018
1. Infrastructure	1. Sustainability
2. Visitor Behaviour – Freedom camping	2. Local and Central Govt support
3. People and Skills	3. Infrastructure
4. Funding	4. People and Skills
5. Connectivity	5. Funding

Source: TIA State of the Industry Report 2017 and 2018

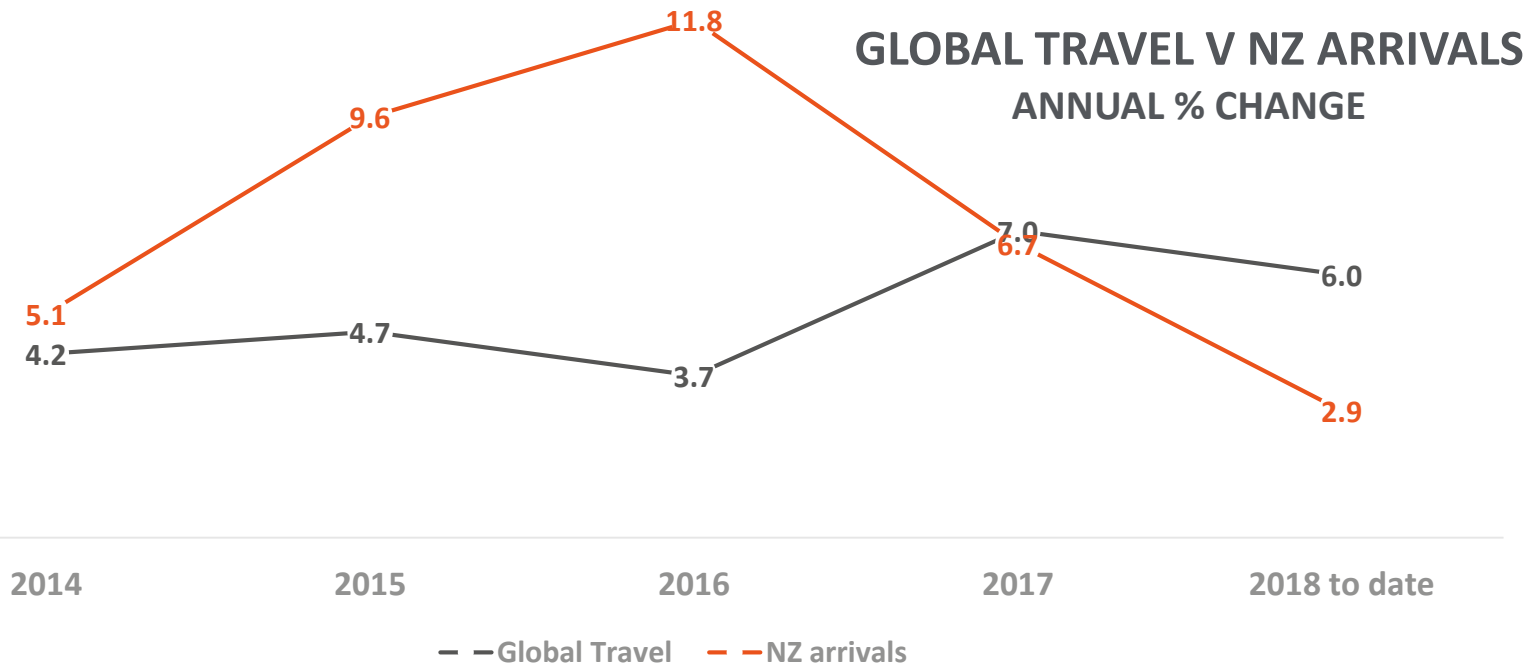
Global Context

- 1.3 billion overseas trips in 2017 ↑7%
 - 6% growth 1H 2018
 - Forecast to hit 2 billion trips by 2027
- 10.4% of global GDP (NZ\$11 trillion)
- 313 million people employed (10% of global employment)
- A quarter of all new jobs in next 10 years will be in tourism

Source: WTTC and UNWTO



Volume Growth



Value Growth

- Value growing faster than volume
- Every region of New Zealand benefiting

REGION	Visitor Spend YE Sep	Year to Year Growth
Auckland	\$8,398 m	6%
Canterbury	\$3,940 m	15%
Otago	\$3,914 m	12%
Waikato	\$2,673 m	7%
Wellington	\$2,594 m	7%
Bay of Plenty	\$1,886 m	6%
Northland	\$1,127 m	3%
Manawatu-Wanganui	\$1,043 m	7%
Southland	\$669 m	11%
Hawke's Bay	\$645 m	5%
West Coast	\$558 m	8%
Taranaki	\$404 m	12%
Marlborough	\$402 m	13%
Nelson	\$365 m	6%
Tasman	\$304 m	3%
Gisborne	\$162 m	19%

Source: MBIE MRTE's, YTD to September 2018

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Source: MBIE MRTE's, YTD to September 2018

Visitor Accommodation: Hotels

Region	Occupancy	YoY change	RevPAR	YoY change
Auckland	83%	-4%	\$171	-\$7
Rotorua	78%	+2%	\$102	+\$6
Wellington	78%	-3%	\$133	-\$8
Christchurch	75%	+1%	\$118	+\$4
Queenstown	82%	0%	\$197	+\$20
NZ	79%	-1%	\$151	+\$1

Source: TIA Hotel Sector Survey, YTD to September 2018

T2025 Scorecard



Visitor Experience

% of international visitors with expectations met or exceeded



Connectivity

Available international airline seats
Available domestic airline seats



Productivity

Regional Dispersal – Gateways/Other split
Season Dispersal – Spring, Summer, Autumn, Winter



Target for Value

Total Tourism spend, domestic and international

T2025 Scorecard



Visitor Experience

Met or exceeded expectations

Source: International Visitor Survey

YE June



93.2%
2014



95.1%
2015



94.9%
2016



93.4%
2017



95.2%
2018

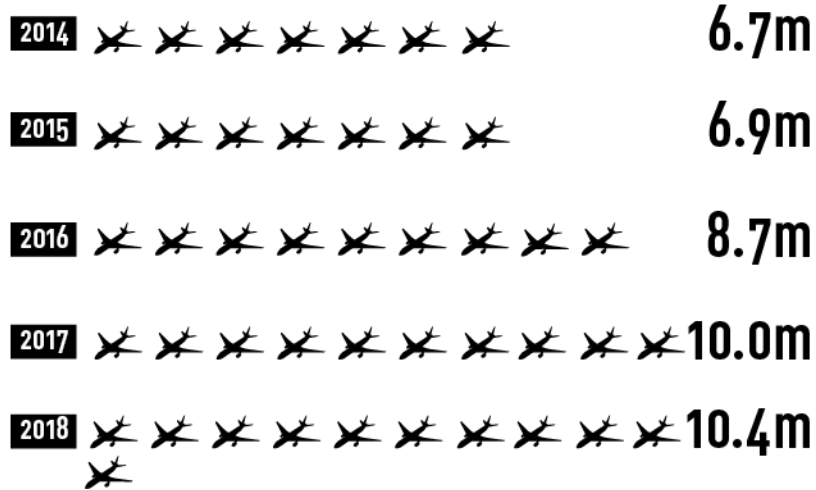
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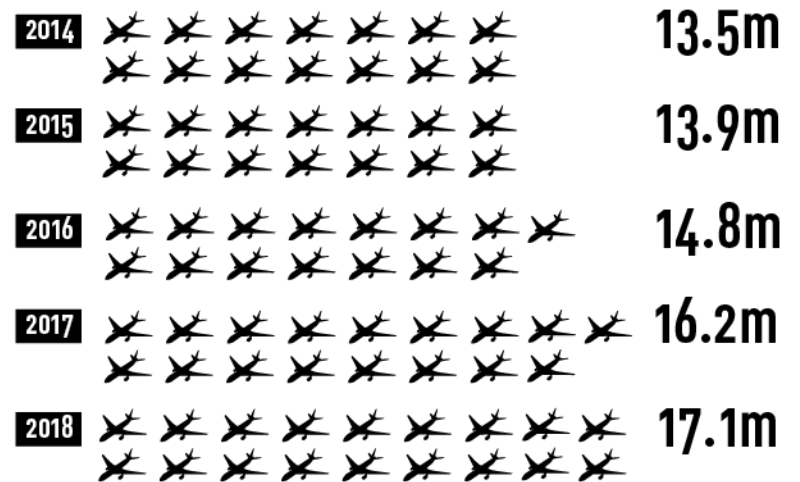
Connectivity

Source: Sabre - Total air capacity (seats)
YE March

International Seats



Domestic Seats

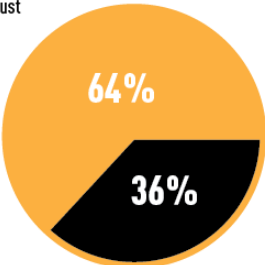


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Productivity

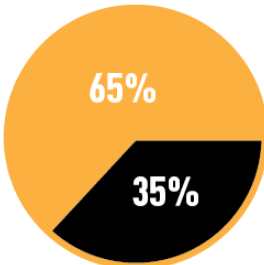
Dispersal of International Tourism spending
Source: MBIE Monthly Regional Tourism Estimates
YE August

No Progress



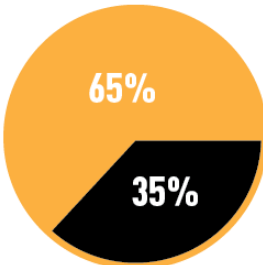
2014

Gateway
Auckland, Wellington,
Christchurch, Otago

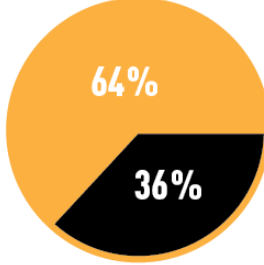


2015

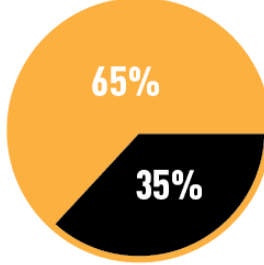
Regional
All other regions



2016



2017

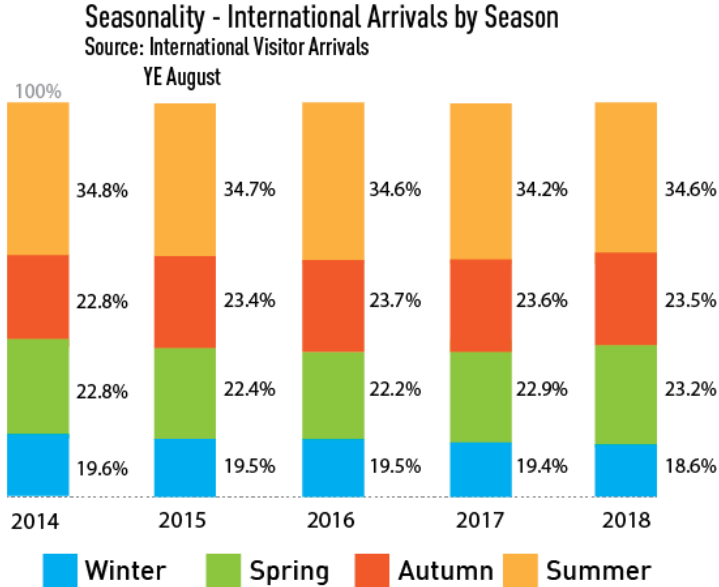


2018

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💰 Productivity

❌ No Progress



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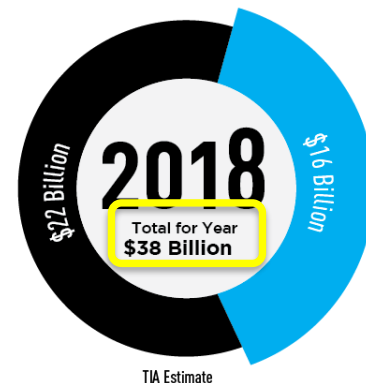
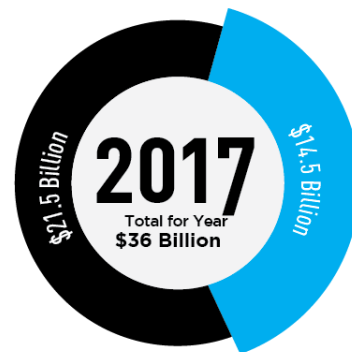
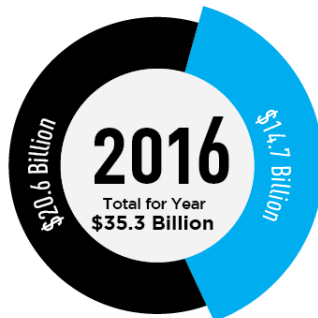
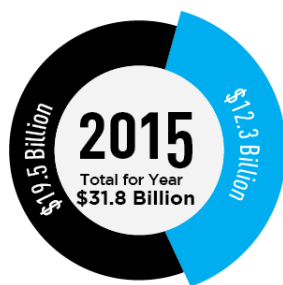
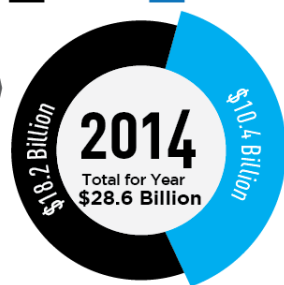
Target for Value

Tourism Expenditure

Source: Tourism Satellite Account
YE March

Domestic International

Strong Progress



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 Target for Value

