

Picturesque, remote, and gifted by nature's wonders, New Zealand's North and South islands provide breathtaking scenes and activities, at every corner. Only 3 hours by plane from Sydney Airport, New Zealand packs a lot of adventure and exploration opportunities into a country the size of Britain. Famously referred to as 'God's country' and 'The land of the long white cloud', New Zealand gives Australian visitors the perfect escape regardless of the cities visited or the type of traveller you are.

OVERVIEW NEW ZEALAND WHAT TO SEE NEW ZEALAND Deep Canyon Rappel your way down Deep Canyon. Wanaka Omaka Aviation Heritage Center World-class exhibition of historic aircrafts. Blenheim Whakarewarewa Forest Famous for its Californian coastal redwoods. Rotorua World of Wearable Art New Zealand's largest arts event. Nelson Rubicon Valley Horse Treks Explore Rubicon Valley by horse. Springfield Wanaka Helicopters Helicopter tours around Lake Wanaka. Wanaka Cape Kidnappers An important bird area for the Australasian gannets. Napier's Tongariro Crossing Enjoy world class hiking. Tongariro National Park **SHOPPING NEW ZEALAND** Olivo The oldest commercial olive grove in the Wairarapa! Martinborough Tarot Zamm A mystical adventure when you visit Middle Earth - Wellington! Wellington The Lost Gypsy Gallery An unexpected wonderland! Papatowai Wilderness Gallery A fresh, contemporary gallery located in the heart of Hokitika. Hokitika E Hayes and Sons Hardware store with an extensive display of bikes. Invercargill Vesta Design Store A premier gift and design store in Queenstown. Queenstown Wellington Underground Market Offer hip antiques and pre-owned goods. Wellington Newport Chocolates Ltd. Large-scale sculpture bringing art and nature together. Russell **AUCKLAND** Located towards the top of the North Island, Auckland is the largest and most heavily populated city in New Zealand. Easily accessible by all modes of transport, Auckland offers many tourist attractions all close to the modern CBD area. The Auckland climate is quite moderate, and one of the sunniest cities in the country. A scenic and cosmopolitan destination, Auckland is perfect for exploring mountains, coastlines and cultural sites. **HIGHLIGHTS** Mount Eden Volcano Remarkable views from this accessible volcano. Queen Street Auckland's main tourist strip. Parnell Colonial history and nightlife. Waiheke Island Beautiful coastal escape just 35 minutes by ferry. Auckland's main tourist strip is a bustling area full of attractions and eateries. Named after Queen Victoria, the 3km shopping strip embraces modern Auckland city culture through retail and dining establishments. Live music, nightlife, boutiques, casinos, department stores, and designer brands are all around this iconic strip. The 360-degree views from The Sky Tower are incredible (for those willing to brave New Zealand's tallest man-made tower). Or, simply indulge at the SKYCITY restaurants for your Queen Street views. **QUEEN STREET** To give you a proper appreciation of the Auckland landscape and its various volcanic cones, take some time to explore one of the accessible volcanoes, such as Mount Eden. Mount Eden is the highest at 196 metres, providing remarkable Auckland views out into the Waitemata Harbour. Drive, walk, or take a guided tour and discover former Maori settlements. Auckland's oldest suburb is full of history, culture, tourist sights, and nightlife. Auckland Domain is the city's oldest park and at over 75 hectares, it's a perfect opportunity to actively explore or relax. Displays of colonial history are found everywhere you look, from the heritage buildings to the Auckland Museum. You'll soon see why the suburb is referred to as 'boutique' with beautiful, unique shops and eateries that line the pretty streets creating an exclusive vibe. **MOUNT EDEN VOLCANO PARNELL** Waiheke Island is the third-most populated island after the North and South islands, and is a beautiful coastal escape just 35 minutes by ferry from Auckland. Located in the Hauraki Gulf, the island is accessible by water and air, and is a must-see if you're keen to take part in any water-based activities. Also referred to as the Island of Wine, there are countless beaches to explore and lots of great food. The secluded beaches and serene national reserves are ideal for a romantic and memorable couples' adventure. **WAIHEKE ISLAND**

ACCOMMODATION AUCKLAND +6498878483 *Based on reviews HOTEL DEBRETT 2 High Street, CBD Auckland, 1010 Review by TripAdvisor Traveller Reviewed P2017 This was a great city break boutique hotel. Rooms were great and spaicious. Service very good. dinner at the restaurant was

great and very gluten and dairy free friendly. Breakfast was very good as well with all kinds of allergy friendly options. Wine list at the bar excellent. I will be back 8/01/2017 1053 Tel: *Based on reviews ABACO ON JERVOIS 59 Jervois Road, Ponsonby, Herne Bay Auckland, 1011 Review by TripAdvisor Traveller Reviewed San_Fior Very clean and quiet. Great location - great area for cafes, restaurants and trendy shops. Well located for easy access to both city centre and main roads to the north and south. Great Wifi Internet. 6/01/2017 252 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 ACCOMMODATION AUCKLAND +6498862470 *Based on reviews SOFTEL AUCKLAND VIADUCT HARBOUR 21 Viaduct Harbour Avenue, Auckland, 1010 Review by TripAdvisor Traveller Reviewed In terms of location, the Sofitel was a quiet 10 minute walk to the wharf where there are some trendy restaurants and shops. Walking in the opposite direction, toward the Wynyard Quarter which seemed to be a new development, it is also 10 minute walk to a slew of casual and trendy restaurants by the water. I especially enjoyed these walks after our sumptuous dinners. Our room was nicely furnished, modern and fresh, the big windows making the room... 8/01/2017 2566 Tel: *Based on reviews SKYCITY GRAND HOTEL 90 Federal St, Auckland, 1010 Review by TripAdvisor Traveller Reviewed MichaelTheWanderer Well located in the CBD. Short walk (5-10 minutes) to the waterfront, shopping, and restaurants. Large and modern rooms. Reasonable rates. Adjoining rooms worked well for our family of five -- one king for the parents and two doubles for the three teenagers. For the US crowd -- the "double" beds were indeed large enough for two people to share. 8/01/2017 2259 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE AUCKLAND +64 9-377 8537 *Based on reviews KAZUYA 193 Symonds Street, Eden Terrace Auckland, 1010 Review by TripAdvisor Traveller Reviewed Abe L Not sure if there's a Michelin guide in New Zealand, but if there is, this place should definitely be in it. Amazing food and service! This was easily our highlight in Auckland. Delicious food and very unique presentation and preparation. Although the restaurant seems a bit out of place within its surroundings; next to cheap ethnic Chinese and Indian restaurants, it was a truly awesome experience. 4/01/2017 216 Tel: +64 9-360 2122 *Based on reviews SIDART Level 1 Three Lamps Plaza 283 Ponsonby Road, ponsonby, Auckland, 1011 Review by TripAdvisor Traveller Reviewed Tamojacko My husband and I were treated to an incredible degustation dinner here. It blew our minds. Everything was sensational, the taste, the presentation, the wine, the service. We'd be back every week if we could afford it!! A real treat for all the senses. Perfect for a special occasion. 4/01/2017 581 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE AUCKLAND WINE & DINE AUCKLAND +64 9-358 1702 *Based on reviews CLOONEY RESTAURANT 33 Sale Street, Freeman's Bay Auckland, Review by TripAdvisor Traveller Reviewed MichaelTheWanderer Our family of five (two adults with three very lucky teenagers) thought that this was a really fantastic, memorable meal. It was a definite splurge, but one to consider for all serious foodies. The prix fixe tasting menu -- which is required on weekends -- marches through the best of New Zealand. The restaurant also recently started using local New Zealand wines for the pairing, which was spot on. (And I now plan to have import a few cases to... 8/01/2017 699 Tel: +64 9-377 1911 *Based on reviews THE FRENCH CAFE 210 Symonds Street, Auckland, 1010 Review by TripAdvisor Traveller Reviewed 75beenaround Took 2 overseas clients who have dined in some of the best restaurants all over the world to French Cafe. Intention is obviously to impress them and also, to obtain their reaction and feedback. All the hype and anticipation after obtaining a booking a week ahead of dinner, they were not impressed. Food and atmosphere were just okay as far as they were concerned - nothing out of what would be expected as standard for the sort of prices charged. 8/01/2017 1025 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 CHRISTCHURCH A South Island playground, Christchurch is a must-see city for wine lovers and adventure seekers. It's the gateway to the Canterbury region and the most common South Island port for travellers coming from Australia. You'll never be far from beautiful snow-capped mountains or spectacular coastal towns. The CBD is slowly re-opening after the devastating 2011

earthquake to provide many fresh and innovative experiences. **HIGHLIGHTS** Aoraki Mount Cook An unforgettable sight to admire and explore. Whale Watching Get up close with the sperm whales, fur seals and dolphins. Avon River Explore Christchurch's beautiful Avon River. Waipara Valley A spectacular wine region just a 40 minute drive north. A journey on a punt boat is the best way to explore Christchurch's beautiful Avon River. Sit back and relax as a punter guides you through the waters and past some of Christchurch's cherished spots. The Avon River is the perfect setting for a romantic outing. **AVON RIVER** New Zealand's highest peak is an unforgettable sight to admire and explore. Unleash your adventurous side with 4WD safaris, horse treks, scenic flights, snow landings, and walks through the national park. The alpine village in the Mackenzie region is renowned for its massive glaciers and incredible starry skies at night. Step aboard the Christchurch gondola to see amazing views of the city and its surrounds. The gondola is open all year round and gives all travellers a real appreciation of Christchurch's beauty and landscape. This is a memorable and eye-opening experience only 15 minutes from the city. **AORAKI MOUNT COOK CHRISTCHURCH GONDOLA** 1.5 hours from Christchurch, Mount Hutt is one of the largest and highest ski areas in the South Island. It also boasts the longest ski season and has daily shuttles from Christchurch and Methven (35 minutes away). Mount Hutt boasts one of the largest drops in the South Island, but conveniently caters to all skier profiles, from beginner to professional. With skiing, snowboarding passes and day trips a-plenty, it's easy to discover 'true' New Zealand ski country! **MOUNT HUTT** 2.5 hours from Christchurch, the Kaikoura region is home to a beautiful mix of water, mountains and wildlife. Take a boat cruise, helicopter, or plane to get up close with the sperm whales, fur seals and dolphins. You can even choose to take a dip in the pristine waters and swim with the animals! An eco-tourism gem, Kaikoura is rich with natural and cultural heritage. Waipara Valley is a spectacular wine region just 40-minutes drive north of Christchurch airport. Take the Alpine Pacific Route from here to discover Hanmer Springs, a therapeutic mineral springs and adventure resort. Waipara Valley is highly regarded around the world, and the Waipara Valley wine and food festival in March is the perfect way to celebrate the region's 80 wineries and its fares. **WHALE WATCHING WAIPARA VALLEY** **ACCOMMODATION CHRISTCHURCH** +6433771554 *Based on reviews **AMROSS COURT MOTOR LODGE** 61 Bealey Avenue, Christchurch, 8013 Review by TripAdvisor Traveller Reviewed kmacke_225090 The room was spacious and tidy and well equipped. Felt welcoming and relaxing, welcoming staff and very good location close to everything. Comfortable beds and good quality fittings. Good parking for vehicles and handy to all that we needed. Will stay again. 8/01/2017 630 Tel: +6436680689 *Based on reviews **COMMODORE AIRPORT HOTEL, CHRISTCHURCH** 449 Memorial Avenue, Christchurch, 8053 Review by TripAdvisor Traveller Reviewed fromthebush Great room so clean and up to date the service was 1st class from start to finish the bar staff so friendly and the crew on reception made you feel like you were coming home instead of a hotel I wish major hotel groups take a lesson from this place keep up the amazing service you guys rock 7/01/2017 1289 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 **ACCOMMODATION CHRISTCHURCH** +6436694648 *Based on reviews **AIRPORT PALMS MOTEL** 56 Roydvale Avenue, Burnside Christchurch, 8053 Review by TripAdvisor Traveller Reviewed chefneatswarwick Awesome place to stay. So close to the airport for our very early morning flight. Bill was so nice to come and pick us up after dropping our car hire off. Rooms are beautifully presented and immaculately clean. Pat was so nice to change our room after wanting a down stairs room. No problems at all. Pity we only had 1 night there. Definitely recommend this motel for sure. Will stay here again when we are back in Christchurch. Thanks 😊 8/01/2017 625 Tel: +6436680621 *Based on reviews **MERIVALE MANOR** 122 Papanui Road, Merivale Christchurch, 8014 Review by TripAdvisor Traveller Reviewed MagsATL Stayed at Merivale Manor two different times while traveling in NZ. It gets our rating of A+/Excellent for many reasons. The owners Wayne & Karen are very hospitable, knowledgeable of the area, gregarious, kind and concerned for their guests. Hotel is very "secure" when it comes to earthquakes.

We experienced a 7.8 while there and our room remained quite stable. (unlike my nerves!) The rooms are a nice size, with very large bathrooms w/spa t... 8/01/2017 502 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE CHRISTCHURCH +64 3-387 0707 *Based on reviews PEDRO'S HOUSE OF LAMB 17b Papanui Road, Merivale Christchurch, 8014 Review by TripAdvisor Traveller Reviewed Christopher N Excellent! These guys do one thing, literally one dish, and they do it to PERFECTION. IMO these guys are Michelin Star quality but I also don't want them to get a Michelin star so I don't have to book 3 days in advance for some lamb. 7/01/2017 667 Tel: +64 3-366 2727 *Based on reviews TWENTY SEVEN STEPS 16 New Regent Street, Christchurch, 8011 Review by TripAdvisor Traveller Reviewed Marie G Absolutely delicious food. Lovely staff. Fast no fuss service. Highly recommend. Close to theatre. Great old chch street rebuilt 5/01/2017 322 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE AUCKLAND WINE & DINE CHRISTCHURCH +64 3-943 5970 *Based on reviews NOBANNO 1060 Ferry Road, Christchurch, Review by TripAdvisor Traveller Reviewed Valerie W I loved the chicken special with it's mango sauce - Flavourful spices, rather than hot spices and sugar like some of the Indian restaurants here. Also tasted two veggie and one shrimp main of my fellow diners - all tasty. Colourful and delicious sauces accompanied the starters and was beautifully presented. This restaurant was still vivid in my mind since I ate here 4 years ago. Though we drove much further than we'd normally go for an evening out... 6/01/2017 380 Tel: +64 3-943 1662 *Based on reviews ADDINGTON COFFEE CO-OP 297 Lincoln Rd, Addington Christchurch, 8024 Review by TripAdvisor Traveller Reviewed fludlle We go to another top Brunch spot almost every weekend here in Christchurch and felt like we were cheating on it by even considering another place, however it was definitely worth it! Super busy which we actually love, very efficient and friendly staff and the coffee is just amazing, our meals came quick and were super! We bought a bag of coffee too! 8/01/2017 370 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 BAY OF ISLANDS The Bay of Islands is a stunning sub-tropical region that consists of over 144 islands and is only a 3-hour drive from Auckland. Day and multiple-day tours will take you all around the region to discover the best sites. Ideal for fishing, sailing, swimming, and walking, the various towns and islands provide a unique touch of the northern New Zealand coastline.

HIGHLIGHTS Paihia Paihia is a perfect place to stay and explore the Northland region. Russell Russell is an easy day-trip from Paihia by ferry. Opua Opua is popular for diving, snorkelling and coastal walks. Waitangi Another stunning region of the Bay of Islands. A bustling seaside town, Paihia is a perfect place to stay and explore the Northland region and go on day trips to other towns. Described as 'The Jewel of the Bay of Islands', you can go sailing, sea kayaking, fishing, or picnicking along the gorgeous beaches. Many tour services operate to historic Maori sites like Cape Reinga, the Hauru Falls and Tane Mahuta forest. Enjoy one of the many live music events or festivals held throughout the year. PAIHIA Opua is often the first glimpse of the Bay of Islands you'll catch if you're travelling from Auckland. A quiet, subdued coastal town, the wharf and water are the centre of activity. Opua is popular for diving, snorkelling and coastal walks. The popular walk from Opua to Paihia covers 1.5km of the unique Northland environment, from beach to mangrove, to colourful blossoms. A popular couple's destination, boutique bed and breakfasts provide amazing coastal views and secluded serenity. Photo by John Benwell, available under a Creative Commons Attribution-NoDerivs 2.0 Generic license. Russell is an easy day-trip from Paihia by ferry. Food and music lovers will enjoy the atmosphere and attractions here, and the water is clear, clean, blue, and serene. Hire a yacht, go swimming or walk to the famous flagpole to absorb the ultimate view. Beat the summer and winter crowds by visiting in spring or autumn. OPUA RUSSELL Waitangi is historically significant to New Zealanders: it's the site where New Zealand's founding document, the Treaty of Waitangi, was first signed between the Maori and British. Discover more about Waitangi's historical past and the Maori culture by visiting the Treaty Grounds. Another stunning region of the Bay of Islands, Waitangi is a 30-minute walk from Paihia, and offers plenty of seaside activities. WAITANGI ACCOMMODATION

BAY OF ISLANDS +6494077629 *Based on reviews KAURI PARK MOTEL 512 Kerikeri Road, Kerikeri, 0293 Review by TripAdvisor Traveller Reviewed damour6566 Loved our stay here. Great amenities, private and super friendly and respectful hosts. Fab private pool area with bbq and seating with fairy lights. Didn't want to leave! Great location close to everything you can do in Kerikeri. The hosts were super helpful and we thought the price was good. 5/01/2017 366 Tel: *Based on reviews BREAKWATER MOTEL 1 Bayview Road, Bay of Islands Paihia, 0200 Review by TripAdvisor Traveller Reviewed kiwimuse Nice, spacious room with comfortable bed, full kitchen and barbecue. The people who run it are really nice - Lynn asked if I was doing any tours and phoned the tour operator for me to confirm the pickup time. 8/01/2017 563 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 ACCOMMODATION BAY OF ISLANDS +6498879449 *Based on reviews COOK'S LOOKOUT MOTEL 9 Causeway Road, P.O. Box 380 Paihia, 0257 Review by TripAdvisor Traveller Reviewed Diana B We stayed here over Christmas in one of the studio apartments. Was lovely to have our own space and balcony with the most incredible views. Certainly felt like paradise waking up here on Christmas Day!!! Norm and Shelagh were very welcoming and helpful. Only downside was the cooking facilities, which were a little disappointing - no oven and only small plug-in two ring hob. That said, we would definitely return here and recommend highly... the fa... 4/01/2017 892 Tel: *Based on reviews ANCHORAGE MOTEL 2 Marsden Road, Paihia, Review by TripAdvisor Traveller Reviewed neener63 As everyone else has mentioned - the motel is immaculate (inside and out). The kitchen is well appointed and served our breakfast needs. We used the BBQ one night as well. We loved eating our dinner outside by the pool. The beds and bedding were excellent. The room layout worked really well with our children in the bedroom with the single beds and we were able to stay up later in the front. The only downside (and not fault of the motel) is t... 7/01/2017 409 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE BAY OF ISLANDS +64 9-407 8936 *Based on reviews FOOD AT WHAREPUKE 190 Kerikeri Road, Kerikeri, 0230 Review by TripAdvisor Traveller Reviewed RiverstoneLodg Went with family on the Friday. Had Thai banquet which was delicious. The waitress found us a place inside the cafe even though it was fully booked. Food again was tasty and well presented. Staff were friendly and attentive. Generous portions. Atmosphere was buzzing. Summer is such a busy time for the restaurant. You need to book. Worth a visit. Our favourite restaurant. 7/01/2017 549 Tel: +64 9-407 5115 *Based on reviews THE ITALIANS 35 Kerikeri Rd, Kerikeri, 0245 Review by TripAdvisor Traveller Reviewed Val L Beautifully balanced flavours with a very extensive menu. The food was mouthwateringly tasty and obviously made with love. Definitely recommend. 7/01/2017 397 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE AUCKLAND WINE & DINE BAY OF ISLANDS +64 9-403 7670 *Based on reviews THE GABLES RESTAURANT 19 The Strand, Russell, 0202 Review by TripAdvisor Traveller Reviewed hootermoss Had dinner with family on new yrs eve and had a wonderful meal. Service was slow while waiting for a table but they were busy, once seated service was good. Very pleasant all round experience. 8/01/2017 666 Tel: +64 9-402 7637 *Based on reviews EL CAFE 2 Kings Road, Paihia, 0200 Review by TripAdvisor Traveller Reviewed Nicole G Just got coffee which was really nice. Saw some peoples breakfast come out and it looked pretty good. 4/01/2017 282 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 ROTORUA AND TAURANGA Rotorua is in the Bay of Plenty region on the southern shores of Lake Rotorua. A 2.5 hour drive from Auckland, it is an unforgettable city to visit while exploring the North Island's vast geographic regions. Rotorua is a unique environment scattered with hot springs, mud pools, lakes, and forests. Pamper yourself with body treatments and luxury spas, get in touch with New Zealand nature, or get your heart beating with adventure activities. Tauranga is the most heavily populated city in the Bay of Plenty region and the city's harbour is a beautiful backdrop to the many different coastal walks and seaside activities. HIGHLIGHTS Geothermal Springs Visit Rotorua's unique thermal springs. Rotorua Tours Explore the Rotorua forests and waters. Swim with Dolphins In the clear waters of the Bay of Plenty. Tasting Tours

The region also accommodates food and wine lovers. The Bay of Plenty region accommodates food and wine lovers. You'll be able to sample wines from boutique and world-class wineries with Tauranga Tasting Tours. If you're after a full-day trip, take a 6-hour tour of leading wineries and restaurants, finishing with sublime views over Tauranga Harbour, cocktails in hand.

TASTING TOURS

To explore the Rotorua forests and waters you can take a paddle tour or a 'forest zipline' canopy tour and fully immerse yourself in New Zealand wilderness. Use a stand-up-paddle to master the waters of Lake Rotorua, Lake Rotoiti and the Maketu Coast. With the sparkling water literally at your feet, enjoy the serenity while under the supervision of expert instructors. The canopy tours offer a 3-hour unique and educational adventure through virgin native forest.

ROTORUA TOURS

Rotorua's unique thermal springs were first discovered as early as 1874 and provide a therapeutic, sensual experience unique to this region. Whether you prefer a dip in the natural environment or in a special day spa retreat, Rotorua will be a relaxing and rejuvenating stopover. The Polynesian Spa is just one of the day spas offering couples and family pools, and treatments overlooking the stunning landscape. The warm, clear and safe waters of the Bay of Plenty are perfect to explore the marine wildlife, including various dolphin species. Tauranga is thriving with tour operators specialising in dolphin watching, swimming with dolphins, snorkelling, and kayaking. Day trips that depart from Tauranga and include equipment and food.

GEOTHERMAL SPRINGS SWIM WITH DOLPHINS

AUCKLAND ACCOMMODATION

ROTORUA AND TAURANGA +6477880158

*Based on reviews

QUEST ROTORUA CENTRAL 1192

Hinemoa Street, Rotorua, 3010 Review by TripAdvisor Traveller Reviewed 13 Susan We stayed at Quest Rotorua Central for 4 nights, and we loved it! The location is great, close to supermarket, cafe, and restaurants. Staff members are very helpful. They also offer vouchers for some activities at Rotorua, make sure you ask at time of booking. 8/01/2017 614 Tel: +6478085053

*Based on reviews

SPORT OF KINGS MOTEL 6

Peace St, Fenton Park Rotorua, 3010 Review by TripAdvisor Traveller Reviewed DannyD2009 This is our second visit to Sport of Kings and we have not regretted it for a moment. From the welcome, to the quality of the room, to the location. Still the same high standards we received on our previous visit. Had a room with a private spa this time and certainly a good choice. Spotless, quiet and relaxing. looking forward to our next visit. 8/01/2017 1147 Tel:

*TripAdvisor ratings and reviews accurate as of January 2017

AUCKLAND ACCOMMODATION

ROTORUA AND TAURANGA

*Based on reviews

ARISTA OF ROTORUA 296

Fenton Street, Rotorua, 3010 Review by TripAdvisor Traveller Reviewed ManojD75 Stayed 3 nights with family (couple plus 7 year old boy). We booked directly, check-in was smooth. Rooms are spacious with private outdoor spa (our son loved the spa). Great place for families. Recommended 7/01/2017 798 Tel: *Based on reviews

SILVER FERN ROTORUA ACCOMMODATION AND SPA 326

Fenton Street, Rotorua, 3010 Review by TripAdvisor Traveller Reviewed Lynda J Great accommodation. Very neat, clean and plenty of room for a family of five. Staff were very helpful with suggestions of things to do. Good location, bit of a walk to town but doable. Central to everything. Highly recommend. 8/01/2017 900 Tel:

*TripAdvisor ratings and reviews accurate as of January 2017

WINE & DINE ROTORUA AND TAURANGA +64 7-348 3332

*Based on reviews

CIABATTA CAFE AND BAKERY 38

White Street, Rotorua, 3010 Review by TripAdvisor Traveller Reviewed Fogs32 This is a bustling little bakery cafe in an industrial area between Rotorua city area and the redwoods. The food is great. The bread is excellent. We bought a loaf to take on a walk and picnic, and even though they don't have an automatic slicer the lady working there simply said we are slicers and carved the whole loaf for us by hand. 7/01/2017 350 Tel: +64 7-347 7851

*Based on reviews

PIZZERIA IMPERFETTO 1176

Pukaki Street, Rotorua, 3010 Review by TripAdvisor Traveller Reviewed Kelvin L My wife and I stopped in at Pizzeria Imperfetto after reading the reviews on TA and after we had a hankering for pizza and I'm glad we did!! We got there early as we had not made a reservation and we knew Rotorua was busy! I'm glad we got there early as they were basically turning people away after that! We ordered two pizzas and a garlic bread to start. The pizza was superb, in fact some of the best I've had in NZ, the

service was friendly, per... 8/01/2017 180 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE ROTORUA AND TAURANGA +64 7-348 2983 *Based on reviews ALI BABA'S TUNISIAN TAKEAWAYS 1146 Tutanekei Street, Central City Rotorua, 3010 Review by TripAdvisor Traveller Reviewed ccwallington Good portions for a reasonable price. I had the berber rice meal twice, it was excellent both times. The staff couldn't be friendlier. Highly recommended! 7/01/2017 302 Tel: +64 7-349 0591 *Based on reviews SABROSO 1184 Haupapa Street, Rotorua, 3010 Review by TripAdvisor Traveller Reviewed glutenfree4life Taste was very good and service was great. The lady chef came and asked us several times on how the food was. For drinks we had margaritas and sangria. Both were good. The dessert trio was good too though we really didn't care for the avocado cream but that's a personal choice. The restaurant is quite small with seating for 6,7 tables but the decor was nice and it did not feel crowded. At \$45 pp for the set menu for NYE, it was a pretty good deal. 8/01/2017 507 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 QUEENSTOWN Queenstown is an adventure and resort paradise in the south-west of New Zealand's South Island. The lake and alpine town offers unbeatable views, experiences and accommodation, year-round. The winter months provide incredible ski and snow attractions, while the other months offer many sporting, spa and relaxing pursuits. HIGHLIGHTS Bungy Jumping Queenstown is an iconic destination for bungy jumping and adrenaline activities. 4WD Lord of the Rings Tour Delve into stunning Lord of the Rings scenery. Paraflights A thrilling paraflight through Queenstown. White Water Sledging A 6 km trail of grade-3 series rapids. Queenstown is an iconic destination for bungy jumping and adrenaline activities. If you're in the market for a hair-raising or stomach-dropping jump, Ledge Bungy is located in the centre of Queenstown and is the only night-operating bungy service. The sparkling lights of Queenstown will flicker right before you as you dangle from the 400 metre-high ledge. If simple jumps are too bland for you, you can mix it up with a twist, run, spin or flip. There's no backing out (and no shortage of other jumps to try if you get addicted!). BUNGY JUMPING Delve into stunning Lord of the Rings scenery by taking an Off-Road Queenstown 4WD adventure into the glaciers, lakes, forests, and peaks Tolkien made famous. Travel in 4WD comfort through the rugged landscape, get perfect photos and even insider Lord of the Rings secrets. Without the need to navigate, you can sit back and watch the scenery come to life, with no need for a musical soundtrack. The Southern Lakes region of New Zealand is famous for intense rapids and a trip down the mighty Kawarau River is unlike any other water adventure on offer around the world. Even if this is your first time diving into water sports, you don't need any experience, just an adventurous spirit. Frogz will take you on a 6 km trail of grade-3 series rapids. LORD OF THE RINGS TOUR WHITE WATER SLEDGING Combine water and air adventures with a thrilling paraflight above Queenstown. You'll possibly have a smoother take-off and landing than most aeroplane flights to Queenstown, and with the added benefit of staying dry (if you choose to), it's a highlight for travellers of all ages. Open every day of the year, Queenstown Paraflights caters for large or small groups, and promises the ultimate Queenstown views. PARAFLIGHTS AUCKLAND ACCOMMODATION QUEENSTOWN +6436694681 *Based on reviews QUEENSTOWN PARK BOUTIQUE HOTEL 21 Robins Road, Queenstown, 9300 Review by TripAdvisor Traveller Reviewed Mtnd0g We stayed at QPH for 4 nights in Dec/ Jan. The hotel is immaculate. Great view of the park, exceptionally clean, great amenities. The room we stayed in, room 11 I think, was a great place to come home to after a day out in Queenstown and surrounding areas. The room had a small kitchenette, a fridge, and a sink, which meant we didn't have to eat out every night. The staff really makes the hotel awesome. They helped us arrange trips, made dinn... 8/01/2017 730 Tel: *Based on reviews THE DAIRY PRIVATE HOTEL 10 Isle Street, Queenstown, 9300 Review by TripAdvisor Traveller Reviewed The_hammonds_11 The friendliest of welcomes with a glass of bubbles. Quaint hotel, room was cosy, comfy bed. Couple things in bathroom needed attention (shower leaked, missing door hooks - to hang robes after hot tub). Room had small balcony on Main Street with lots of passing traffic to gondola and crazy golf, slightly noisy

but good for people watching! Use of hot tub. Breakfast great selection of food, choice of 3 time sittings Short walk into town. 5/01/2017 807 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 AUCKLAND ACCOMMODATION QUEENSTOWN +6436671587 *Based on reviews VILLA DEL LAGO 249 Frankton Road, Queenstown, 9300 Review by TripAdvisor Traveller Reviewed sarah14387 LOVED this place from the moment we arrived. Stayed for 4 nights over Christmas. Location is just stunning, views of the lake and mountains right outside our door. Room itself was very very modern, and had all that we needed and more. Main bed and sofa bed extremely comfortable. Great size, kitchen fully equipped. Heated floor in bathroom such a fantastic added bonus! Washing facilities, huge fridge/ freezer, excellent gas fireplace... I ju... 7/01/2017 511 Tel: +6436671587 *Based on reviews GLEBE APARTMENTS 1 Beetham Street, Queenstown, 9300 Review by TripAdvisor Traveller Reviewed Ismlady We enjoyed our stay at the Glebe Apartment. It is located a few blocks from the downtown core. We were able to walk to all our downtown destinations in 5 to 10 minutes. Our studio unit was very spacious; we had more square feet than any of the other places we stayed in New Zealand. It was nicely furnished and had a small kitchen. There is a grocery store a couple blocks away. We did not need our rental car. The unit did not have a washer... 3/01/2017 496 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE QUEENSTOWN +64 21 664 043 *Based on reviews PERKY'S - FLOATING BAR , Queenstown Bay Queenstown, 9300 Review by TripAdvisor Traveller Reviewed Adamlidd Awesome place for a beer and chill out with a cool view! Amazing host and even better you can bring your dog aboard. 6/01/2017 105 Tel: 442 5444 *Based on reviews VKNOW Cnr Fernhill Road & Richards Park Lane, Queenstown, Review by TripAdvisor Traveller Reviewed Geoff W We found this restaurant gem on our last night in Queenstown. A fantastic dining experience. Especially recommend the venison with mushroom risotto, seafood bowl and the pizzas. Well worth booking to make sure you don't miss out. 8/01/2017 501 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 WINE & DINE QUEENSTOWN +64 3-441 4526 *Based on reviews PEDRO'S HOUSE OF LAMB QUEENSTOWN 47 Gorge Road, Queenstown, 9300 Review by TripAdvisor Traveller Reviewed Prestidgep Just a quick call ahead had a shoulder of delicious fall of the bone lamb and potatoes. For \$45.00 to feed 2 people, a bargain and so delish. 8/01/2017 631 Tel: +64 274 271 427 *Based on reviews TACO MEDIC 5-17 Church Street, Queenstown, 9300 Review by TripAdvisor Traveller Reviewed MTWare1 I should preface this review with the fact that I grew up in Texas where you can get some amazing tacos. The tacos we had at Taco Medic were pretty good, probably among the best you can get in New Zealand but not up to the best of Texas. 8/01/2017 656 Tel: *TripAdvisor ratings and reviews accurate as of January 2017

WELLINGTON Wellington is New Zealand's capital and its second-highest populated city. A short flight from Sydney Airport, it's a perfect, short escape for couples and families. Close to renowned wineries and restaurants, Wellington is full of sensory delights and experiences. HIGHLIGHTS Seal Coast Safari A 3-hour tour operating twice-daily from Wellington. Cable Car Jump on the historic Wellington cable car for a picturesque ride. Zealandia The Sanctuary gives a glimpse into unique and bizarre wildlife. Zest Food Tours Zest Food Tours is a gourmet walking tour through Wellington. Jump on the historic Wellington cable car for a picturesque ride from Lambton Quay to Kelburn (and avoid the steep hills!). The cable car is so popular it runs every 10 minutes and promises ideal views of the CBD and harbour. A return trip takes only 20 minutes, but if you choose to take a single trip you can walk home through the beautiful hills and get a closer view of Wellington sites. WELLINGTON CABLE CAR A 3-hour tour, operating twice-daily from Wellington, this is a hands-on taste of Wellington scenery and wildlife through the rugged south coast. You're guaranteed to see seals no matter what time of year you visit, and the great views will make for an all-round great New Zealand adventure. Wellington is gifted with numerous attractions which celebrate Wellington and Maori culture, and New Zealand wildlife. 'Zealandia', the Karori Sanctuary, is an amazing glimpse into unique and bizarre wildlife native to New Zealand. Take the nocturnal tour to try and spot a Kiwi! A protected sanctuary,

you will see lizards, birds, tuatara (a dinosaur-era species), and more within the beautiful grounds.

SEAL COAST SAFARI ZEALANDIA If you'd rather someone pick the best of Wellington's 300 different restaurants cafes and bars for you, a guided tour may be a good idea, if you're short on time. Zest Food Tours is a gourmet walking tour through Wellington's hot spots. Recommended by Lonely Planet, Zest takes you to the insider areas of the Cuba and Courtenay Quarters, where cheese, coffee, chocolate, and regional produce abound.

ZEST FOOD TOURS ACCOMMODATION WELLINGTON +6448871285 *Based on reviews **AT HOME WELLINGTON** Level 4 181 Wakefield Street, Wellington, 6011 Review by TripAdvisor Traveller Reviewed H2OAlgae We stayed here only one night prior to our ferry crossing. The security entry to the At Home Wellington was a bit quirky, but pay attention to the directions on your reservation confirmation. The apartment manager was very helpful and friendly. Best of all, we had a small kitchenette with a combo washer/ dryer. By the time the ferry sailed we had clean clothes, fully packed. The king bed was comfortable and we had a balcony. 6/01/2017 659 Tel: +6498879341 *Based on reviews **SOFITEL WELLINGTON** 11 Bolton Street, Wellington, 6011 Review by TripAdvisor Traveller Reviewed ok_xin I am very disappointed that I received a call this morning from Sofitel telling me they have fire in their restaurant and the hotel is closed. Hence the hotel cannot accommodate my prepayment stay of the interconnecting luxury room and superior room for 2 nights on 21 & 22 December in Sofitel (booking made in October). My main purpose of driving from Nelson to Picton to catch the interislander to Wellington is to stay in Sofitel, (then drive to... 9/12/2016 158 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 **ACCOMMODATION WELLINGTON** +18778595095 *Based on reviews **INTERCONTINENTAL WELLINGTON** 2 Grey Street, Wellington, 6011 Review by TripAdvisor Traveller Reviewed Karl M I booked three rooms at the hotel, and when I arrived they upgraded one of the rooms to the same level as the other two I booked. The concierge staff on arrival in our hire vehicle were very attentive and welcoming. Our rooms were the newly refurbished one's and they were very comfortable and quiet. Highly recommend this hotel and is in a perfect location for tourists. 8/01/2017 1243 Tel: +6448871871 *Based on reviews **BOLTON HOTEL WELLINGTON** 12 Bolton Street, Lambton CBD Wellington, 6011 Review by TripAdvisor Traveller Reviewed aus59 This hotel has a mix of room types. We stayed in a 2 bedroom apartment. It was very spacious. There was a living room and a kitchenette. Both bedrooms had ensuites which was nice. The apartment was nicely furnished and was spotless. One side of the apartment overlooked another building so there isn't much privacy. The other side overlooked a church/cemetery. I recommend walking through the cemetery as it has an interesting history. We didn't find... 8/01/2017 1275 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 **WINE & DINE WELLINGTON** +64 4-382 9559 *Based on reviews **ORTEGA FISH SHACK** 16 Majorbanks Street, Wellington, Review by TripAdvisor Traveller Reviewed Happy B The service was good and friendly. We ordered some oysters which were nice and fresh. We ordered the paua with spaghetti starter which was quite nice. The whitebait omelette was just okay as we couldn't really taste the whitebait. For the mains, we had the flounder in seaweed butter was very impressive as well as the snapper. We had Catalan crepes for dessert which were also nice. Pricey place, but good food. 3/01/2017 881 Tel: +64 4-384 1181 *Based on reviews **ORPHEUS** 24 Allen Street, Wellington, 6011 Review by TripAdvisor Traveller Reviewed Minh-Dang T If you are looking for a restaurant with a difference, this is the place to go to. My wife and I are from Sydney and we visited New Orleans in 2014 and had a fantastic time, so imagine our delight to find a New Orleans restaurant in Wellington. Upon arriving, we were greeted by a friendly gentleman with a New Orleans accent so that was a positive start for us. 6/01/2017 168 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 **WINE & DINE WELLINGTON** +64 4-801 5114 *Based on reviews **LOGAN BROWN** 192 Cuba Street, Wellington, 6011 Review by TripAdvisor Traveller Reviewed bretttsvl The food was of a high quality the wine list was expensive but there were a couple of bargains to be found Few minor points where service struggled but staff were pleasant Bonus was

the three piece live band playing that added to the ambience 7/01/2017 998 Tel: +64 4-802 5908

*Based on reviews PIZZERIA NAPOLI 30 Courtenay Place, Wellington, 6011 Review by TripAdvisor Traveller Reviewed Don M This seems to be the best pizza place in Wellington, the Peroni on tap is ideally suited to calzone and pizza, and there is a good selection of Italian wines should you prefer. The staff are always smiling and attentive, the place really hums and it's no wonder that it's always busy, generally a reliable sign of a popular restaurant. 4/01/2017 440 Tel: *TripAdvisor ratings and reviews accurate as of January 2017 PACKING ESSENTIALS • Rain gear - For New Zealand's famous 4 seasons in a day! • Warm outfits - The South Island is a lot colder than up north. • Sandals - For those warm summer days! • Hiking shoes - New Zealand has world-class hiking. • Bathers and towel - Some of the best beaches in the world are located here. • Insect repellent - Avoid those pesky mosquitos. • Sun tan lotion - The sun is strong here! • Camera - Don't forget a single moment of your trip!

INFORMATION TRAVEL TIPS • Plan your visit to Sydney Airport by doing some research on the airport and your terminal, whether it be T1, T2 or T3. • Check the security regulations in relation to what you can and cannot take through the security screening point and onto an aircraft, including prohibited items, dangerous goods, and liquids, aerosols, and gels (LAGs). • Check your baggage allowance with your airline. • Use the directional signage at the terminal to ensure a smooth and enjoyable journey through the airport. • Ensure that your driver's licence can be used in your country of destination or that you have organised an international driver's licence. • If you have not already purchased travel insurance along with your ticket, you can purchase it at Sydney Airport at the Last Chance Travel Insurance located in the International Terminal (T1) after Customs.

Alternatively, purchase insurance at any Travelex outlet or the Australia Post Shop at International Terminal (T1) located before Customs, near check-in counter J. GET TO THE AIRPORT • Make sure you have plenty of time ahead of check-in. If you are unsure as to when you should arrive at the airport, contact your airline directly. GET READY FOR BOARDING • Security screening – whether your destination is within Australia or overseas, allow sufficient time to proceed through security screening. • Australian Customs and Border Protection Service – allow sufficient time to proceed through Customs and Border Protection. • Passports - must be valid for a minimum of six months ahead of your departing date for most countries. We strongly recommend you verify exact requirements with your airline. • Boarding passes - issued at the airline check-in counter upon presentation of your ticket reservation (printed e-ticket) or booking confirmation number along with your valid passport. • Immigration cards - available before you enter Customs and Border Protection. The cards must be filled out and presented to the Customs and Border Protection Officer along with your passport and boarding pass. • Find your departing gate using display screens. These screens are available in the airline check-in area and at each departure gate. RELAX • At Sydney airport, you have plenty of options to shop while you are waiting to board your flight. Remember that all duty free purchases must be finalised 20 minutes before your flight departs. INFORMATION YOUR

DESTINATION DISTANCE FROM SYDNEY 3 hours 25 minutes WHEN TO GO Peak: November -February Shoulder: March-May Off Peak: June-October TIME ZONE UTC/GMT +12 hours 2 hours ahead of Sydney LANGUAGE English, Maori CURRENCY New Zealand Dollar (NZD) The Big Mac Index: \$5.50 NZD WEATHER Summer: 20°-30° Winter: 10°-15° INFORMATION THIS EDITION WRITTEN AND RESEARCHED BY Charles Rawlings-Way, Brett Atkinson, Sarah Bennett, Peter Dragicevich, Lee Slater

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SPECIAL FEATURES Hiking in New Zealand.36 Skiing & Snowboarding in New Zealand.44 Extreme New Zealand.49 Maori Culture. 631 From the top of the north to halfway down the south: a taste of New Zealand's best. Kick things off in Auckland: it's NZ's biggest city, with awesome restaurants and bars, galleries and boutiques, beaches and bays. Not an urbanite? Head north to the salt-licked Bay of Islands for a couple of days R&R. Tracking south, Rotorua is a unique geothermal hot spot: geysers, mud pools, volcanic vents and Maori culture make for an engaging experience. Further south, progressive Taupo has the staggeringly beautiful Lake Taupo and Tongariro National Park nearby. Try some tramping, mountain biking or skydiving, then hoof it down to Wellington, a hip little city with an irrepressible arts scene. Across Cook Strait, see what all the fuss is about in the Marlborough Wine Region. The hypnotically hushed inlets, ranges and waterways of the Marlborough Sounds are nearby. Swinging south, spend a day whale-watching in Kaikoura, then cruise into Christchurch for some southern culture and hospitality. North & South AUCKLAND Rotorua Taupo Wellington Kaikoura Christchurch •# Bay of Islands •# Lake Taupo Tongariro# National Park •# Marlborough Sounds •# Marlborough Wine Region É É É É É É É T A S M A N S E A S O U T H P A C I F I C O C E A N É •# •# •# •# •# •#_ Itineraries 2 WEEKS 31 ©Lonely Planet Publications Pty Ltd Classy cities, geothermal eruptions, fantastic wine, Maori culture, glaciers, extreme activities, isolated beaches and forests: just a few of our favourite NZ things. Aka the 'City of Sails', Auckland is a South Pacific melting pot. Spend a few days shopping, eating and drinking: this is NZ at its most cosmopolitan. Make sure you get out onto the harbour on a ferry or a yacht, and find half a day to explore the beaches and wineries on Waiheke Island. Truck north to the Bay of Islands for a dose of aquatic adventure (dolphins, sailing, sunning yourself on deck), then scoot back southeast to check out the forests and beaches on the Coromandel Peninsula. Further south in Rotorua, get a nose full of egg gas, confront a 30ft geyser, giggle at volcanic mud bubbles and experience a Maori cultural performance (work your haka into shape). Cruise down to Napier on the East Coast, NZ's archetypal art-deco sun city. While you're here, don't miss the bottled offerings of the Hawke's Bay Wine Country (...ohh, the chardonnay). Down in Wellington, the coffee's hot, the beer's cold and wind from the politicians generates its own low-pressure system. This is NZ's arts capital: catch a live band, some buskers, a gallery opening or some theatre. Swan over to the South Island for a few days to experience the best the south has to offer. Start with a tour through the sauvignon blanc heartland of the Marlborough Wine Region, then jump on a boat/plane/helicopter for a close encounter with a massive marine mammal in Kaikoura. Next stop is Christchurch – the southern capital is finding its feet again after the earthquakes – followed by the coast road south to the wildlife-rich Otago Peninsula, jutting abstractly away from the Victorian facades of Scottish-flavoured and student-filled Dunedin. Catch some live music while you're in town. Head inland via SH8 to bungy-obsessed Queenstown. If you have time, detour over to the West Coast for an unforgettable encounter with Franz Josef Glacier and Fox Glacier. From here you can keep driving back north, or play airport hopscotch from Hokitika to Christchurch then back to Auckland. 4 WEEKS •# Bay of Islands AUCKLAND Rotorua WELLINGTON Kaikoura Christchurch Queenstown Dunedin T A S M A N S E A S O U T H P A C I F I C O C E A N •#Marlborough Wine Region •# Hawke's Bay Wine Country Napier •# Franz Josef Glacier & Fox Glacier Coromandel Peninsula •# Waiheke Island #– É É É É É É É Otago Peninsula #_ •# •# •# •# •# •# •# •# Kiwi Classics 32PLAN YOUR TRIP I tiner a ries Take a long loop through the best of the South Island. Winging into Christchurch to launch this three-week escapade, you'll find a vibrant city rebuilding post-earthquakes. Grab a coffee at a cafe (try Addington Coffee Co-op), then visit the excellent Canterbury Museum. Check out the Avon River, cutting lazily through the Botanic Gardens. City saturated? Visit the geologically and culturally eccentric Banks Peninsula, then head north for whale-watching in Kaikoura. Continue through the famous Marlborough Wine Region, and lose a day on the Marlborough Sounds waterways. Detour west past artsy Nelson to eco-friendly Golden Bay (more paintbrushes than people). Southbound,

dawdle down the dramatic West Coast with its glaciers and wilderness, and continue through to hip/hippie Wanaka and ski central Queenstown. Desolate Doubtful Sound is mesmerising, while the overgrown Catclins are perfectly chilled out. Back up the east coast, wheel through Dunedin to surprisingly hip Oamaru, before rolling back into Christchurch. 3 WEEKS Southern Circuit Virgin visitors to NZ will want to check out NZ's tourist icons, plus a few active wilderness experiences. Cruise sail-dappled Auckland harbour, then take SH1 north to the winterless Bay of Islands: surfboards, sailing, kayaks, scuba gear... Heading south, hold your nose in sulphurous Rotorua, then hook into idyllic Taupo for some volcanic tramping in nearby Tongariro National Park. Take SH43 west to photogenic Mt Taranaki, then stay up late in Wellington. Across Cook Strait, disappear into the Marlborough Sounds or launch into some sea-kayaking in Abel Tasman National Park. Track down the rainy West Coast with its iconic glaciers, then experience adrenaline-addicted Queens-town. Mix and match highways to Te Anau for the side road to Milford Sound, then backtrack to SH6 and head north for cloud-piercing Aoraki/Mt Cook. Veer east back to Christchurch, a city on the mend. Don't miss exploring the Banks Peninsula, southeast of town. 5 WEEKS •# Bay of Islands AUCKLAND Rotorua Taupo #Tongariro National Park Mt Taranaki R WELLINGTON Nelson Kaikoura Christchurch Queenstown Wanaka Oamaru •# Marlborough Sounds Abel Tasman National Park Banks Peninsula R Aoraki/ Mt Cook # # • • West Coast Glaciers Milford Sound •# T A S M A N S E A S O U T H P A C I F I C O C E A N •# Golden Bay •#Marlborough Wine Region •# Catclins Doubtful Sound•# •#•# •# •# •# •# •# •#_ •# É É É É É É É É É É É É É É É É É É Icons & Beyond Southern Circuit Icons & Beyond 33 PLAN YOUR TRIP I tiner a ries OLIVER STREWE/GETTY IMAGES © MATT MUNRO/LONELY PLANET © Top: Waitakere Ranges Regional Park (p111) Bottom: Mt Ngauruhoe, Tongariro National Park (p262) 34PLAN YOUR TRIP I tiner a ries Three-quarters of New Zealanders live on the North Island – find out why! Begin in Auckland, NZ's biggest city. Eat streets abound: try Ponsonby Rd in Ponsonby, K Rd in Newton, and New North Rd in Kingsland. Hike up One Tree Hill (Maungakiekie) to burn off resultant calories, and don't miss Auckland Art Gallery and Auckland Museum. Heading north, the amazing Waipoua Kauri Forest is home to some seriously tall timber. The rugged tip of the far north is Cape Reinga, rich in Maori lore. Venture back south through geothermal Rotorua then the Bay of Plenty to the sunny East Coast. Art-deco Napier is surrounded by the chardonnay vines of Hawke's Bay Wine Country. Follow SH2 south into the sheepy/winey Wairarapa then continue down to hip Wellington. Heading northwest, there's crafty glass in Whanganui, the joyously scenic Whanagnui River Road and epic Mt Taranaki. Go underground at Waitomo Caves, surf the point breaks near Raglan, then hit Auckland again. 3 WEEKS Northern Exposure Is there another 1.4-million-strong city with access to two oceans and vibrant Polynesian culture? Auckland also offers stellar bars and restaurants, museums, islands and beaches. Check out the Maori and South Pacific Islander exhibits at Auckland Museum, then wander across the Domain to K Rd for lunch. Pay a visit to the grand Auckland Art Gallery and the iconic Sky Tower, then Ponsonby for dinner and drinks. Ferry over to Rangitoto Island, then chug into Devonport for a meal. Have a look at the tall timber in Waitakere Ranges Regional Park, or check out the wild surf at Karekare and Piha, then hit the Kingsland restaurants. Have breakfast in Mt Eden, climb Maungawhau, then ferry-hop to Waiheke Island for wineries and beaches. Activities within easy reach of the big smoke: snorkelling at Goat Island Marine Reserve, sailing the Bay of Islands, ocean-gazing at Cape Reinga, ogling giant trees at Waipoua Kauri Forest, delving into Waitomo Caves, surfing at Raglan or beaching yourself at Whitianga. 2 WEEKS Cape Reinga Bay of Islands Goat Island Marine Reserve Rangitoto Island Waiheke Island Waitakere Ranges Regional Park Karekare & Piha Waitomo Caves AUCKLAND Raglan Whitianga # T A S M A N S E A S O U T H P A C I F I C O C E A N Rotorua Napier Whanganui Wellington Bay of Plenty East Coast Hawke's Bay Wine Country Wairarapa •# Whanganui Mt Taranaki River Road É É É É É É É É É É •# Kauri Forest Waipoua #÷ •#•# #÷ •# •# •# •# •# •# •# •# •# •# •# R •# •# #_ •# •# É É É É É É É É É É Auckland Encounter Northern Exposure É Auckland Encounter 35 PLAN YOUR TRIP I tiner

a ries Peter Dragicevich Christchurch & Canterbury, Dunedin & Otago, Queenstown & Wanaka After nearly a decade working for offshore publishing companies, Peter's life has come full circle, returning to his home town of Auckland. As managing editor of Express newspaper he spent much of the '90s writing about the local arts, club and bar scene. This is the 4th edition of the New Zealand guide he's worked on and, after dozens of Lonely Planet assignments, it remains his favourite gig. Peter also wrote The Kiwi Psyche chapter, and the Arts section of the Arts & Music chapter. Contributing Writers Professor James Belich wrote the History chapter. James is one of NZ's pre-eminent historians and the award-winning author of The New Zealand Wars, Making Peoples and Paradise Reforged. He has also worked in TV – New Zealand Wars was screened in NZ in 1998. Tony Horwitz wrote the Captain James Cook boxed text in the History chapter. Tony is a Pulitzer-winning reporter and nonfiction author. His fascination with James Cook, and with travel, took him around NZ, Australia and the Pacific while researching Blue Latitudes (alternatively titled Into the Blue), part biography of Cook and part travelogue. John Huria (Ngai Tahu, Muaupoko) wrote the Maori Culture chapter. John has an editorial, research and writing background with a focus on Maori writing and culture. He was senior editor for Maori publishing company Huia and now runs an editorial and publishing services company, Ahi Text Solutions Ltd (www.ahitextsolutions.co.nz). Josh Kronfeld wrote the Surfing in New Zealand boxed text in the Extreme New Zealand chapter. Josh is an ex-All Black flanker, whose passion for surfing NZ's beaches is legendary and who found travelling for rugby a way to surf other great breaks around the world. Gareth Shute wrote the Music section in the Arts & Music chapter. Gareth is the author of four books, including Hip Hop Music in Aotearoa and NZ Rock 1987–2007. He is also a musician and has toured the UK, Europe and Australia as a member of the Ruby Suns and the Bruettes. He now plays in indie soul group The Cosbys. Vaughan Yarwood wrote the Environment chapter. Vaughan is an Auckland-based writer whose books include The History Makers: Adventures in New Zealand Biography, The Best of New Zealand: A Collection of Essays on NZ Life and Culture by Prominent Kiwis, which he edited, and the regional history Between Coasts: From Kaipara to Kawau. He has written widely for NZ and international publications and is the former associate editor of New Zealand Geographic, for which he has also written for many years. Read more about Peter at: lonelyplanet.com/thorntree/profiles/peterdragicevich ©Lonely Planet Publications Pty Ltd Charles Rawlings-Way Coordinating Author, Taranaki & Whanganui, Rotorua & the Bay of Plenty, The East Coast English by birth, Australian by chance, All Blacks fan by choice: Charles' early understanding of Aotearoa was less than comprehensive (sheep, mountains, sheep on mountains...). He realised there was more to it when a wandering uncle returned with a faux-jade tiki in 1981. He wore it with pride until he saw the NZ cricket team's beige uniforms in 1982... Mt Taranaki's snowy summit, Napier's art-deco deliverance and Whanganui's raffish charm have helped him forgive: he's once again smitten with the country's phantasmal landscapes, disarming locals, and determination to sculpt its own political and indigenous destiny. Charles also wrote the Plan Your Trip section, and the Directory and Transport chapters. Brett Atkinson Auckland, Bay of Islands & Northland, Waikato & Coromandel Peninsula Resident in Auckland, Brett leapt at the chance to research his home town for this edition. Highlights include exploring the city's emerging restaurant scene around Wynyard Quarter, and journeying to the diverse islands of the Hauraki Gulf. Excursions further afield to Northland and Coromandel echoed family holidays in an earlier century. Brett's contributed to Lonely Planet guidebooks spanning Europe, Asia and the Pacific, and covered almost 50 countries as a food and travel writer. See www.brett-atkinson.net for his latest travels. Sarah Bennett & Lee Slater Taupo & the Central Plateau, Wellington Region, Marlborough & Nelson, The West Coast, Fiordland & Southland Lee and Sarah live in Wellington, but spend many months on the road each year in their small campervan, boots on board, mountain bikes on the back. Specialists in 'soft-core adventure' (tramping without crampons), they re-imagine their journeys into magazine features, and guidebooks including Lonely Planet's Hiking & Tramping in New Zealand, four editions

of New Zealand, as well as The New Zealand Trumper's Handbook and Let's Go Camping. Read more at www.bennettandslater.co.nz and follow on Twitter @BennettSlater. Sarah and Lee also wrote the New Zealand Today chapter. OUR STORY A beat-up old car, a few dollars in the pocket and a sense of adventure. In 1972 that's all Tony and Maureen Wheeler needed for the trip of a lifetime – across Europe and Asia overland to Australia. It took several months, and at the end – broke but inspired – they sat at their kitchen table writing and stapling together their first travel guide, Across Asia on the Cheap. Within a week they'd sold 1500 copies. Lonely Planet was born. Today, Lonely Planet has offices in Franklin, London, Melbourne, Oakland, Beijing and Delhi, with more than 600 staff and writers. We share Tony's belief that 'a great guidebook should do three things: inform, educate and amuse'. OUR WRITERS Although the authors and Lonely Planet have taken all reasonable care in preparing this book, we make no warranty about the accuracy or completeness of its content and, to the maximum extent permitted, disclaim all liability arising from its use. Published by Lonely Planet Publications Pty Ltd ABN 36 005 607 983 17th edition – September 2014 ISBN 978 1 74220 787 2 © Lonely Planet 2014 Photographs © as indicated 2014 10 9 8 7 6 5 4 3 2 1 Printed in China All rights reserved. No part of this publication may be copied, stored in a retrieval system, or transmitted in any form by any means, electronic, mechanical, recording or otherwise, except brief extracts for the purpose of review, and no part of this publication may be sold or hired, without the written permission of the publisher. Lonely Planet and the Lonely Planet logo are trademarks of Lonely Planet and are registered in the US Patent and Trademark Office and in other countries. Lonely Planet does not allow its name or logo to be appropriated by commercial establishments, such as retailers, restaurants or hotels. Please let us know of any misuses: lonelyplanet.com/ip. OVER PAGE MORE WRITERS © Lonely Planet Publications Pty Ltd © Lonely Planet Publications Pty Ltd. To make it easier for you to use, access to this chapter is not digitally restricted. In return, we think it's fair to ask you to use it for personal, non-commercial purposes only. In other words, please don't upload this chapter to a peer-to-peer site, mass email it to everyone you know, or resell it. See the terms and conditions on our site for a longer way of saying the above - 'Do the right thing with our content.'

Invest in New Zealand Tourism | 1 INVEST IN NEW ZEALAND TOURISM • All statistics and figures in this document are reflective of tourism trends and international arrival numbers pre COVID-19. They are intended to provide an understanding of the underlying strength and growth potential of New Zealand's tourism industry. CONTENTS Disclaimer All statistics and figures in this document are reflective of tourism trends and international arrival numbers pre COVID-19. They are intended to provide an understanding of the underlying strength and growth potential of New Zealand's tourism industry. Foreword 5 Why invest in New Zealand's tourism sector? 6 Sector stories 18 Regional overviews 36 Get in touch – next steps for investors 68 4 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 5 Tourism is a leading export earner and driver of economic growth for New Zealand. The industry presents numerous opportunities for the right investors to make a significant impact. As New Zealand's largest export earner, tourism plays a pivotal role in our economy, contributing \$15.9 billion or 6.1 percent of New Zealand's Gross Domestic Product (GDP) and directly employing 8 percent of the New Zealand workforce 1 . Tourism spending has surged in recent years and is forecast to continue growing as we focus on attracting higher-value visitor segments and making New Zealand a year-round visitor destination. The warmth of our welcome and uniqueness of our culture, combined with our stunning and diverse landscapes, give us the perfect proposition for high-value global visitors. It is these factors that have visitors talking about us long after they're gone, with 94 percent of visitors reporting that New Zealand exceeded their expectations. New Zealand is a destination that offers a political haven and economic stability, together with a high quality of life. The rapid growth in visitor numbers has put pressure on some public and private infrastructure. The New Zealand Government recognises the importance of tourism and is supporting the sector by contributing to the development of quality infrastructure to

cater for increased demand. This commitment is reflected in two key funds which support the tourism sector and help regions to expand their capacity. The Government has allocated \$3 billion over three years to the Provincial Growth Fund for New Zealand's regions. This presents an opportunity to invest in tourism-related projects where they align to the regions' strengths. The Tourism Infrastructure Fund has provided over \$100 million for local communities facing pressure from tourism growth. It offers funding to support the development of tourism-related infrastructure such as carparks, freedom camping facilities, wastewater works and transport projects. New Zealand Trade and Enterprise (NZTE) is leading a coordinated government project aimed at accelerating new private investment into tourism attractions, in partnership with the Ministry of Business, Innovation and Employment (MBIE) and Tourism New Zealand (TNZ). We are building a robust pipeline of high-quality projects around the country with the intention of reducing shortages in the sector. This prospectus summarises key information and independent forecasts in relation to the New Zealand tourism sector. It provides a snapshot of international and domestic data, cut by activity and region, to provide a fact base for tourism investment decisions in New Zealand. The New Zealand Government is committed to attracting high-quality investment. NZTE, MBIE, TNZ and our public and private partners are seeking to enrich New Zealand through sustainable tourism growth. We welcome your interest in being a part of our growing tourism economy and attracting the investment this sector needs. This type of investment helps lift the value of the industry, provides premium visitor experiences and supports regions and communities to thrive from tourism. We look forward to working with investors in developing exceptional tourism attractions that meet the increasing demands of visitors to New Zealand.

FOREWORD Hon Kelvin Davis Minister of Tourism Hon Phil Twyford Minister for Economic Development 6 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 7

DEMAND IS GROWING First-rate demand drivers combined with superb global connectivity have fuelled a boom in international visitation. It is expected that visitor demand will continue to experience strong growth over the next 10 years.

VISITOR SPEND OPPORTUNITY As high-paying demand from visitors increases, there is still significant opportunity to increase visitor spend by offering enhanced attractions.

DIVERSE TOURISM OFFERING New Zealand's advantage over other destinations is that it offers visitors a rich and diverse offering within a small geographical area.

INFRASTRUCTURE New Zealand's world-class transport infrastructure and regional diversity provide clear tourism routes and a captive market for tourism investment.

OPEN FOR BUSINESS New Zealand is renowned for its environmental diversity and increasingly proactive approach to sustainability, providing a unique opportunity for socially, environmentally, and economically aware investors. New Zealand is a safe place to invest and do business.

WHY INVEST IN NEW ZEALAND'S TOURISM SECTOR? 8 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 9

First-rate demand drivers combined with superb international connectivity have fuelled a boom in international visitors. International visitor arrivals to New Zealand reached a record 3.8 million in 2018, representing a 57 percent increase from 2009 and continuing to exceed official forecasts². MBIE predicts this exceptional growth in international visitors will continue. MBIE's most recent forecasts suggest international visitor arrivals will total 5.1 million annually by 2025, representing seven-year growth of 4 percent per year and 1.2 million visitors³. Total annual international spend is forecast to reach \$15 billion in 2025, up 34 percent from 2018, equating to a 4.8 percent growth rate per year. Spend growth is forecast to grow at a slightly higher rate than visitor numbers, suggesting that spend per visitor will increase. International visitor arrivals to New Zealand⁴

Australian and Chinese holidaymakers are the leading international visitors Australia and China are New Zealand's largest international visitor markets, contributing half of all international visitors in 2018. Visitor arrival projections to 2025 place China's growth firmly ahead of all other markets. Annual visitor arrivals are expected to increase 55 percent from 449,000 in 2018 to 696,000 by 2025. Australia is New Zealand's largest visitor market by spend; however, China will be a close second by 2025. A key factor driving

this shift is a strong trend towards the Free and Independent Traveller (FIT) segment, and away from tours and groups. In August 2017, FIT visitors accounted for approximately 75 percent of all visitor visas issued to Chinese visitors to New Zealand, a significant increase from 40 percent in August 2013. The Chinese FIT segment is highly lucrative, as these visitors typically stay longer and spend more money relative to other visitor types. In 2025 the average Chinese visitor is forecast to spend \$342 per day, 68 percent higher than the 2025 average visitor spend of \$203.

0 1m 2m 3m 6m 4m 5m 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 2024

2025 Share of international visitor arrivals to New Zealand by market Source: Statistics New Zealand, MBIE visitor arrival forecasts, Fresh Info Aus chi uk us canada germany india japan south kor sing other Aus chi uk us canada germany india japan south kor sing other 2019 2025 Aus chi uk us canada germany india japan south kor sing other 2019 2025 Australia 38% China 12% United Kingdom 6% United States 9% Canada 2% Germany 3% India 2% Japan 2% South Korea 2% Singapore 2% Other 22% Australia 35% China 14% United Kingdom 6% United States 10% Canada 2% Germany 2% India 2% Japan 2% South Korea 3% Singapore 2% Other 22% DEMAND IS GROWING The holiday visitor segment is growing strongly Holiday visitors represent a strong and growing New Zealand visitor segment, boosted by the increasing adoption of a more independent travel style by Chinese and other international visitors. Holiday visitors typically spend more money than other visitor types. Share of international visitor arrivals by purpose of visit Domestic tourism is thriving and provides a robust visitor base for tourism experiences in New Zealand Kiwi tourists are increasingly spending more in their own country, with annual domestic tourism expenditure increasing to \$63 million per day compared to annual international tourism expenditure at \$44 million per day. The increase in domestic spending reflects continued strength in the retail, passenger transport, and hospitality sectors. Domestic tourism has a big part to play in regional dispersal and smoothing out seasonality. To this end, New Zealand has a collaborative and industry-wide group that focusses on creating a sense of connection between New Zealand and New Zealanders, leveraging a greater share of New Zealanders' disposable income, and addressing seasonality. Led by the Tourism Industry Association, the Domestic Tourism Working Group includes representatives from Regional Tourism Organisations New Zealand, the Automobile Association, Air New Zealand, Hospitality New Zealand, Holiday Parks New Zealand, Intercity, the New Zealand Cycle Trail, i-SITE New Zealand/ Tourism New Zealand, the Department of Conservation and the Ministry of Business, Innovation and Employment. Domestic visitation by four sectors Occupancy rates in New Zealand rank with the best in the Asia-Pacific A surge in international visitors to New Zealand has helped make Auckland one of the strongest-performing hotel markets in the Asia-Pacific region. Occupancy rates in Auckland and Queenstown are on par with the likes of Sydney and Melbourne, which are experiencing similar patterns of tourism growth to New Zealand. 2019 2025 2018 Holiday 52% VFR 28% Business 8% Other 12% Culture and heritage 24% Natural environment 28% Adventure tourism 26% Wellness 22% Annual hotel occupancy in major New Zealand markets as at December 2018 Queenstown Christchurch Wellington Rotorua Auckland Source: CBRE 83% 76% 79% 79% 84% 10 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 11 100% Pure New Zealand Campaign Tourism New Zealand is the Government organisation responsible for marketing New Zealand to the world as a visitor destination. Its activity is focussed on high-value consumers in 15 key markets, in order to achieve maximum benefit to New Zealand from visitation. Tourism New Zealand's '100% Pure New Zealand' marketing campaign has been running for two decades and has made New Zealand one of the world's most well-respected tourism brands. The latest evolution of the campaign is '100% Pure New Zealand – 100% Pure Welcome', showcasing our unique people and hospitality in our amazing landscapes. Visitor attraction data We have developed, and made available to the public, quality international and domestic visitor attraction data. This data provides detailed information on where our visitors come

from and what visitor attractions they are seeking in a trip to New Zealand and its regions. VISITOR SPEND OPPORTUNITY VISITOR EXPERIENCE SPEND INCREASED 45% TO \$359 MILLION SINCE 2009 OVERALL VISITOR SPEND INCREASED 69% TO \$11.8 BILLION SINCE 2009 International visitor spend is growing faster than visitor arrival numbers, demonstrating the increasing value of visitors to New Zealand. This positive trend is expected to continue. Average spend by visitors increased by 4 percent to \$3,290 for the year ending 30 June 2018. New Zealand has ample capacity for quality tourism experiences targeting high-value visitors. Spend on attractions in New Zealand is very low compared to retail and food and beverage expenditure. In the year to February 2019, visitor spend on attractions and activities was only 4 percent of total visitor spend (\$1.2 billion). This compares to \$7.9 billion spent in general retail, \$4.8 billion spent on food and beverage services, and \$4 billion spent on passenger transport. Comparable countries such as Australia and Norway have higher tourist attraction spend by percentage from international visitors. International visitors, aged 15 years and over, currently spend an average of just \$131 on visitor experiences during their stay in New Zealand. 12 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 13

Tourism attractions in New Zealand are experiencing record operating performance across all key sectors of natural environment, culture and heritage, health and wellness and adventure. The industry is underpinned by strong demand and high-yielding quality attractions, but is under served. This represents an opportunity for investors to participate and enhance the offering for visitors across New Zealand's geographical diversity. A surge in visitors to New Zealand is driving record performance. The high demand for tourism attractions is predicted to continue growing across a diverse offering to visitors, including adventure, health and wellness, culture and the natural environment. Tourism is supported by New Zealand's regional diversity New Zealand's impressive regional diversity and compact size makes tourism flows more predictable. This presents an excellent opportunity to invest in established tourism routes.

- Northland – sub-tropical climate, picturesque coastline, bays and beaches, and marine environment
- Auckland – New Zealand's largest and most multi-cultural gateway city, magnificent seaside setting
- Waikato – Natural environment (as made famous by The Lord of the Rings and The Hobbit trilogies), adventure tourism, glowworm caves
- Bay of Plenty – Natural environment, oceans and beaches, active volcano and Māori culture
- Rotorua – Geothermal natural hot springs town, adventure tourism, 18 lakes and centre for Māori culture
- Taupō – lake, adventure tourism, ski resort destination
- Taranaki – Mount Taranaki, incredible coastline, magnificent gardens, art and food.
- Tairāwhiti Gisborne and Hawke's Bay – incredible scenery, wine country (the second largest in New Zealand), Māori culture, and art deco nostalgia
- Manawatu-Whanganui – majestic gorges, sweeping mountain ranges, glow worm caves and rugged west coast beaches
- Wellington and the Wairarapa – capital of New Zealand, celebrated art, cultural and creative hub; vineyards, craft beers
- Nelson and Marlborough – New Zealand's premier Sauvignon Blanc region, beautiful beaches and national parks, health and wellness
- West Coast – rugged coastline, incredible scenery, glaciers, lush rainforests, and health and wellness
- Canterbury – rapidly re-emerging gateway to the South Island, Port Hills, adventure tourism, art and food
- Queenstown and Southern Lakes – a four-season resort destination, nature, adventure tourism, health and wellness
- Otago and Southland – national parks, wildlife, natural experiences, history, unique marine environment, arts and culture

DIVERSE TOURISM OFFERING 14 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 15

INFRASTRUCTURE GERMANY 42% HONG KONG 15% CHINA 36% SOUTH KOREA 48% JAPAN 26% TAIWAN 24% CANADA 33% USA 33% 38% BRAZIL 38% ARGENTINA 35% CHILE 24% NEW ZEALAND DOMESTIC 42% PHILIPPINES 25% AUSTRALIA 39% INDONESIA 29% SINGAPORE 32% INDIA UK 37%

Underserved demand for travel to New Zealand

Source: Auckland Airport (2017), Investor Day Presentation

Tourism is supported by New Zealand's interlinked routes and diverse offering. New Zealand's impressive regional diversity, compact size and clear infrastructure routes make tourism flows more predictable. This presents an opportunity to

invest in established tourism routes. The New Zealand Government sees the importance of tourism to New Zealand's ongoing prosperity and invests in infrastructure and marketing to ensure that the sector continues to thrive. Over the coming years New Zealand will spend an unprecedented amount on infrastructure capital projects – an estimated \$129 billion. This includes investment in the State Highway system, local roads and horizontal infrastructure, and a \$2 billion investment into major initiatives that will deliver faster, better internet⁵. Through the Provincial Growth Fund, the Government is investing to facilitate sustainable tourism growth in our regions. A recent example is the recent Government investment of \$88 million for tourism on the West Coast of the South Island, as part of ensuring the region's popular sites and unique environments are both protected and able to continue offering high-quality experiences for visitors. This included:

- \$25.4 million for the upgrade of the tourism infrastructure at Punakaiki/Dolomite Point where there are an estimated 385,000 visits each year. It will future-proof Dolomite Point, providing a new visitor experience centre, landscaping, upgraded toilets and carparks, pedestrian and cycleway linkages, and an underpass to ensure visitors can bypass the State Highway when visiting the iconic Pancake Rocks.
- \$5.7 million to upgrade the existing access road to the unique limestone caves at Oparara Arches, reroute walking infrastructure to ensure safety for visitors and the environment, and consider options for enriching the visitor experience.
- \$3.5 million to improve access to the Paparoa Track (Great Walk) to better accommodate visitors and improve the economic benefits associated with the track.

The Provincial Growth Fund is investing in tourism destinations around New Zealand, including significant investments in Rotorua, the Central North Island, Northland and the Bay of Plenty. The Government continues to invest in tourism across New Zealand. The Department of Conservation is investing \$72 million to address tourism pressures on Public Conservation Land, and the Tourism Infrastructure Fund is investing \$100 million over four years to provide tourism amenities. The growth in international tourism to New Zealand has been supported by growth in international air access and domestic air capacity. Long-haul routes have improved accessibility from visitor markets including Europe, Asia and the Middle East. Recently opened routes include Taipei, Dubai and Chicago. To help accommodate an increase in visitor traffic, Auckland International Airport Limited (AIAL), New Zealand's major aviation gateway, plans to invest \$2 billion in aeronautical infrastructure by 2022. The planned projects include expanding and upgrading the international departure experience and investing in public transport, roading and walking projects. In addition, AIAL plans to build a second runway by 2028. The airport had 20.5 million visitors in 2018, a 5.7 percent increase on 2017.

6. INTERNATIONAL AIRPORTS 5 33 INTERNATIONAL CARRIERS AND 46 DIRECT FLIGHT ROUTES REGIONAL AIRPORTS 30 DIRECT AND EFFICIENT ACCESS AROUND NEW ZEALAND HIGHEST RATIO GLOBALLY 11,000 KM'S OF STATE HIGHWAYS AND 80,000 KM'S OF LOCAL ROADS PER CAPITA SEAPORTS 17 ALLOWING FOR SIGNIFICANT GROWTH IN THE CRUISE LINE SECTOR RAIL TRACK 4,000 KILOMETRES

New Zealand's transport infrastructure and regional diversity provide clear tourism routes and a captive market for tourism. Underserved demand percentages reflect the percentage of total market demand potential that is unmet, as travellers who want to fly between these international locations and New Zealand cannot secure an airline seat. Reasons for this include acceptable price, acceptable routing, convenient travel time, and airline preference. Auckland International Airport Limited (AIAL) uses sophisticated network modelling capabilities to determine these figures.

KEY METRICS FOR TRANSPORT INFRASTRUCTURE New Zealand's transport infrastructure offers excellent connectivity between all of the country's major visitor hubs, and to the rest of the world.

16 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 17 With low sovereign risk and a strong balance sheet position, New Zealand is recognised globally as being a safe place to invest and do business. New Zealand has a high-performing economy, with positive economic growth for 33 of the past 35 years, and projections of sustained growth well into the future. We offer a stable political environment with a policy framework that encourages economic

resilience. New Zealand has transparent financial markets underpinning strong investor confidence. New Zealand has a straightforward, business-friendly and streamlined taxation system supporting capital development, R&D and international investment. In 2018, New Zealand topped the World Bank's list of best countries to start and run a business, and was ranked the 'fifth best country to visit' in the Lonely Planet Best in Travel list. OPEN FOR BUSINESS 1 ST BY THE WORLD BANK FOR EASE OF DOING BUSINESS 2 ND ON TRANSPARENCY INTERNATIONAL'S CORRUPTION PERCEPTIONS INDEX 6 TH ON THE BLACKROCK SOVEREIGN RISK INDEX 2 ND ON THE LEGATUM PROSPERITY INDEX 18 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 19

SECTOR STORIES Natural environment 20 Culture and heritage 24 Health and wellness 28 Adventure 32 What really sets us apart from other destinations is the proximity of our iconic natural landscapes to one another, and the ability to see such vastly different views in a short window of time. The more diversity a visitor can see in a day, the richer their experience of New Zealand. – Tourism New Zealand Insights research 20 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 21

SECTOR HIGHLIGHTS • Nature-based tourism has remained a popular and stable investment within the sector over the past decade. In 2000, New Zealand was home to 54 enterprises (legal business entities) in the public conservation land operation industry, which employed 2,800 people. By 2018 this had more than doubled, with 114 enterprises in operation employing 3,650 people 7. • New Zealand boasts three of the world's Natural Heritage Sites 8: the New Zealand Sub-Antarctic Islands, Te Wahipounamu/South West New Zealand, and Tongariro National Park. It is also the only Asia-Pacific nation with a globally-recognised Dark Sky reserve at Aoraki Mackenzie, and sanctuaries at Great Barrier Island and Stewart Island/Rakiura 9. • In the year ending June 2016, 52 percent of all international visitors to New Zealand visited one or more national parks. • New Zealand was ranked first for Attractiveness of Natural Assets in the World Economic Forum's Global Competitiveness Report 2017. • With 15,000 kilometres of coastline, New Zealand has 37 marine reserves providing a playground for visitors to enjoy and tourism operators to invest in, including whale watching, sea kayaking, diving and snorkelling operations. • There are more than 20 companies offering expedition cruises operating in New Zealand, some of which visit South Island locations on the way to the Sub-Antarctic islands, and others who offer bespoke tours to Stewart Island and Kaikoura¹⁰. New Zealand hosted 259,000 cruise ship passengers in the year ended June 2018 (up 17 percent on 2017), with cruise ship expenditure rising by 18.3 percent (\$434 million). NATURAL ENVIRONMENT 22 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 23

KEY REGIONS FOR NATURAL ENVIRONMENT KEY ACTIVITIES FOR NATURAL ENVIRONMENT Whale watching National parks Scenic boat trips Geothermal parks Day walks Native birds PROTECTION OF THE NATURAL ENVIRONMENT Increased demand for experiences within New Zealand's natural environment has led to growing action and a commitment to ensure the sustainability, protection and restoration of the natural environment. This is exemplified in the Tiaki Promise and New Zealand's responsible camping programme, which are both collaborative initiatives aimed at mitigating the impact of increasing visitor numbers in New Zealand. The Tiaki Promise is a collaboration between Air New Zealand, the Department of Conservation (DOC), Local Government New Zealand, New Zealand Māori Tourism, Tourism Holdings Ltd, Tourism Industry Aotearoa, and Tourism New Zealand. 'Tiaki' is the Māori term for caring for people and place. Promoted to both domestic and international visitors, the Tiaki Promise, or visitor pledge, encourages visitors to be guardians of New Zealand with explicit expectations of the behaviour expected of visitors, including protecting nature, keeping New Zealand clean, driving carefully, being prepared, and showing respect. The sector is also making a significant contribution to restoring the natural environment. Sector support includes biodiversity restoration projects alongside DOC's Great Walks, site research and monitoring, transportation of threatened species, and predator control to improve our indigenous biodiversity. INTERNATIONAL CUSTOMER GROWTH 2018-2025 32.6% DOMESTIC CUSTOMER GROWTH 2018-2025 8.3% INTERNATIONAL

CUSTOMER FORECAST 2025 4.0M PAX DOMESTIC CUSTOMER FORECAST 2025 8.9M PAX ROTORUA WEST COAST NORTHLAND COASTAL OTAGO AND SOUTHLAND CANTERBURY WAIKATO TAUPŌ 24 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 25 SECTOR HIGHLIGHTS •

New Zealand is a country rich in unique Māori heritage and culture. It has a diverse cultural base including indigenous Māori, Polynesian, Asian, European, Middle Eastern and African populations. • International visitors increasingly seek interactive, collaborative cultural experiences. 54 percent of all international holiday visitors to New Zealand claim to have participated in or experienced an element of Māori culture during their stay – particularly visitors from the United Kingdom, Germany, China and the United States. Activities included seeing Māori artefacts, arts and crafts, visiting a marae, seeing a cultural activity, seeing artworks being created, eating traditional Māori food, watching a Māori performance, or experiencing a Māori tradition. • Māori are driven by cultural, environmental and social priorities, as well as commercial aims. They operate with a long-term partnership model and take time to build strong relationships as a key part of their engagement model. Engaging early in the investment development process can be important. • Māori are major investors in the New Zealand tourism sector, including hotels and accommodation, adventure tourism, transportation, food and beverage, and traditional cultural experiences. “He aha te mea nui o te ao? He tangata, he tangata, he tangata! What is the greatest thing in the world? It is people, it is people, it is people.” Experiencing New Zealand’s unique Māori culture is an important part of the international visitor experience, and the number, variety and quality of Māori tourism businesses has increased dramatically in recent years, with the sector making an important contribution to the economy. CULTURE AND HERITAGE 26 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 27 KEY REGIONS FOR CULTURE AND HERITAGE WELLINGTON & WAIRARAPA AUCKLAND KEY ACTIVITIES FOR CULTURE AND HERITAGE Museums and galleries Visiting marae and places of significance for Māori Māori traditional food Engaging in Māori arts and crafts Live Māori performances ROTORUA WEST COAST COASTAL OTAGO AND SOUTHLAND NORTHLAND MĀORI TOURISM Māori provided the first tourism experiences in Aotearoa/New Zealand and continue to play a major role in the tourism sector. Tourism businesses owned and operated by Māori range from large tribal investments in hotels, transportation and adventure tourism to medium and small-scale investments in food and beverage, accommodation and bespoke experiences. The types of experiences operated by Māori cover the full spectrum of visitor experiences as well as providing unique cultural offerings based on traditional values of manaakitanga (caring for the people), kaitiakitanga (environmental guardianship) and whanaungatanga (relationships and familial connections). Examples of Māori tourism offerings include Ngāi Tahu Tourism hosting over 1 million visitors a year at their 14 tourism businesses; Te Wharewaka o Pōneke, an investment in conference facilities, food and beverage and cultural tourism; and Kāpiti Island Nature Tours, which is a family-owned environmental lodge in the midst of a wildlife sanctuary. There is a high level of interest from Māori in investing in tourism, predominantly built around natural assets and culture. These developments have opportunities for co-investment and are mainly in Northland, the Central North Island, the East Coast of the North Island and the top of the South Island. New Zealand Māori Tourism supports burgeoning Māori tourism experiences, advocates for the sector and facilitates investment into Māori tourism. INTERNATIONAL CUSTOMER GROWTH 2018-2025 34.4% DOMESTIC CUSTOMER GROWTH 2018-2025 8.3% INTERNATIONAL CUSTOMER FORECAST 2025 2.9M PAX DOMESTIC CUSTOMER FORECAST 2025 7.8M PAX CANTERBURY 28 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 29 SECTOR HIGHLIGHTS • Health and wellness tourism is a thriving global market, growing by 12 percent annually¹¹ – 50 percent faster than global tourism. • It is estimated that over 26,000 hot spring establishments operate in 103 countries, making thermal/mineral springs by far the single most popular spa experience globally¹². • International wellness visitors spend 59 percent more and domestic wellness visitors spend 159 percent more than

the average visitor. • In the hot spring market, innovative businesses that offer more experiences such as customised bathing packages and non-bathing-related offerings tend to be more commercially successful¹². • Stanford Research Institute has calculated the overall worth of the wellness tourism market to be US\$639.4 billion¹³ – distributed across accommodation/lodging, food and beverage, shopping, and activities and excursions. • Asia-Pacific is the world's second-largest market for wellness tourism, with international travellers eager for rest, relaxation, and rejuvenation¹³. • There is a trend towards independent high-end retreats that offer boutique accommodation, yoga, Pilates, massage, nutrition support, mindfulness training, acupuncture, and outdoor exercise. • New Zealand is ideally positioned to take advantage of health and wellness trends: – Travellers are increasingly looking for destinations that combine health and wellness with unique cultural experiences. New Zealand's natural, geothermal, and coastal landscapes and integration with traditional Māori cultural practices offer the perfect backdrop for this evolving visitor market. It is one of the few places on earth where visitors can soak in natural mineral hot springs and mud pools. – More than 35,000 international visitors travel to New Zealand each year to play at 400 'designed by nature' golf courses or 13 marquee golf courses. • New Zealand now boasts several sophisticated, high-end, luxury destination spas catering for this new category of traveller. For potential investors, however, there is room for growth. Globally, an increasing number of travellers are adding wellness retreats to their itineraries. New Zealand, with its beautiful beaches, national parks and mountain ranges, is well-placed to take advantage of this. Some of our high-end retreats have become primary destinations as, in addition to spas and wellness treatments, they also encompass bodywork, wellbeing and mindfulness.

HEALTH AND WELLNESS 30 | Invest in New Zealand Tourism

Invest in New Zealand Tourism | 31 KEY REGIONS FOR HEALTH AND WELLNESS

ACTIVITIES KEY ACTIVITIES FOR HEALTH AND WELLNESS ACTIVITIES

Luxury wellness retreats World-class golfing Hot pools Health and day spas

NEW ZEALAND'S LUXURY SPA OPTIONS

While hotels have long promoted in-house spa facilities, there is a rising trend towards independent high-end retreats that offer boutique accommodation, yoga, Pilates, massage, nutrition support, mindfulness training, acupuncture, and outdoor exercise. New Zealand now boasts numerous sophisticated, high-end, luxury destination spas across the length and breadth of the country.

Split Apple Retreat in Abel Tasman offers an exclusive boutique experience with Asian influences, spa pool, infinity pool, massage therapies, sauna, steam room, gym, personalised menus, sea kayaking, bush walking, fishing, a traditional Japanese tea ceremony and calligraphy sessions. Aro Hā Wellness Retreat in Glenorchy (just out of Queenstown) is a purpose-built luxury health and wellness centre offering week-long transformational retreats that include hiking, yoga, strength training, and customised organic meals, in a technology detox environment. Cape South Holistic Health & Wellness Retreat in the Hawke's Bay provides a wellness retreat experience in a rural New Zealand setting. Week-long retreats include life and wellness coaching, detox body scrubs, reflexology, iridology, reiki, homeopathy, and transformational breathing – as well as traditional spa offerings. Resurgence Luxury Eco Lodge harnesses New Zealand's unique environmental offerings in its health and wellness offerings and was voted one of the world's 25 best eco-lodges by National Geographic Traveler. The retreat is set among 50 acres of native bushland in the Abel Tasman National Park. Travellers seeking health and wellness have luxury options around New Zealand, offering different experiences. With demand on the increase, however, there is room for growth.

INTERNATIONAL CUSTOMER GROWTH 2018-2025 34.9% DOMESTIC CUSTOMER GROWTH 2018-2025 7.8% INTERNATIONAL CUSTOMER FORECAST 2025 1.5M PAX DOMESTIC CUSTOMER FORECAST 2025 7.2M PAX

ROTORUA WEST COAST NORTHLAND COASTAL OTAGO AND SOUTHLAND CANTERBURY WAIKATO TAUPŌ 32 | Invest in New Zealand Tourism

Invest in New Zealand Tourism | 33 SECTOR HIGHLIGHTS • New Zealand is renowned for adventure tourism. Some of the world's favourite tourism attractions were invented in New Zealand, including jet boating, bungy jumping, black-water (underground) rafting, and zorbing

(also known as an outdoor gravity orb). New Zealand scored seventh place for Adventure in the US News & World '2018 Best Countries' report¹⁴. • Most international visitors to New Zealand are seeking authentic experiences in nature. New Zealand's most popular adventure activities enable visitors to engage with what New Zealand is famous for. • More than half of New Zealand's international visitors tend to participate in adventure activity during their stay here¹⁵. Jet boating is the most popular 'pure' adventure activity, followed by rafting, canoeing, kayaking, and extreme rides. The scope of the sector ranges from extreme to soft adventure. • Adventure activity participants stay longer in New Zealand on average, at 20.2 days versus 11.4 days for non-adventure activity holiday visitors. Visitors taking part in adventure activities spend \$4,061 on average during their time in New Zealand, 17 percent more than non-participants. • The global adventure travel tourism market is predicted to be worth more than US\$1.3 billion by 2023, with a compound annual growth rate (CAGR) of 17.4 percent. The Asia-Pacific region is forecast to record 19 percent CAGR from 2017-2023¹⁶, the world's highest by geographic region – fuelled by economic growth, increasing competition, ease of travel, and regional promotional strategies. Bungy jumping, skydiving, caving, canyoning, jet boating, ziplining... New Zealand has every adventure activity and extreme sport you can think of, and some you've never even heard of – all set to a backdrop of mind-blowing landscapes. For adventure sports enthusiasts of all levels, their visit to New Zealand is literally the trip of a lifetime.

ADVENTURE 34 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 35

KEY REGIONS FOR ADVENTURE TOURISM

NORTHLAND SOUTHERN LAKES KEY ACTIVITIES FOR ADVENTURE TOURISM

Swimming and surfing Rafting, canoeing, kayaking Jet boating Cycling Quad biking, 4WD vehicle tours Skydiving Extreme rides e.g. Luge, fly-by-wire

COASTAL OTAGO AND SOUTHLAND CANTERBURY ROTORUA THE RISE OF ADVENTURE PARKS

Adventure parks are a perfect fit with New Zealand's natural environmental offerings, and their numbers are increasing. New Zealand adventure parks are located in diverse regions, attract a range of different audiences, and are often open in all seasons. This aligns with the New Zealand tourism industry's strategy to spread the benefits of tourism across the year and throughout the country. Adventure parks integrate a range of products including mountain biking, gondola rides, ziplining, cafés, retail stores, and event facilities. This business model allows year-round operation, attracts a wide range of visitors, and offers long-term employment opportunities – as well as stable investment returns. There is evident demand for this type of tourism attraction in New Zealand, with several ventures in development around the country.

INTEGRATION OF ADVENTURE TOURISM

A sense of adventure is part of the New Zealand ethos, and regions are increasingly looking to ways to integrate adventure activities within their tourism offerings. Well-established tourism businesses are also expanding their offerings to incorporate year-round activities. Renowned ski resorts Cardrona Alpine Resort, Remarkables Park Limited, and Ruapehu Alpine Lifts have extended their seasons beyond the traditional winter ski season, and are introducing mountain bike trails, accommodation offerings, and gondola facilities. In the case of Cardrona Alpine Resort, the company's expansion has proved profitable with a staff of 150 now permanently employed and customer numbers on the rise during the traditional summer 'off season'. In the Waikato, several projects are underway incorporating hot springs, sky gardens, water sports, tree walks, suspension bridges, cycling, gondola, ziplines, retail and event facilities, and hotel accommodation and residential living.

INTERNATIONAL CUSTOMER GROWTH 2018-2025 32.7% DOMESTIC CUSTOMER GROWTH 2018-2025 7.8% INTERNATIONAL CUSTOMER FORECAST 2025 2.3M PAX DOMESTIC CUSTOMER FORECAST 2025 8.2M PAX

AUCKLAND WAIKATO 36 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 37

REGIONAL OVERVIEWS

Northland 38 Auckland 40 Waikato 42 Bay of Plenty 44 Rotorua 46 Taupō 48 Taranaki 50 Tairāwhiti Gisborne and Hawke's Bay 52 Manawatu-Whanganui 54 Wellington and Wairarapa 56 Nelson and Marlborough 58 Canterbury 60 West Coast 62 Queenstown and Southern Lakes 64 Coastal Otago and Southland 66

38 | Invest in New Zealand Tourism Invest in New Zealand Tourism |

39 NORTHLAND Key factors driving demand include: • Tourism is the region’s largest industry, with Australian visitors comprising the largest visitor group outside of domestic tourism • New Zealand’s only sub-tropical region, making it an attractive location for international and domestic visitors year-round • Tourism numbers are on the rise – particularly in the shoulder seasons • A proactive economic development unit facilitating collaborative tourism investment projects • Stunning bays and beaches, unique flora and fauna, and numerous attractions • Effective transport infrastructure – three domestic airports, port, and a direct highway from Auckland. Te Tai Tokerau / Northland – the ‘winterless north’ – is home to ancient living forests, incredible marine life, cultural experiences, and the incomparable Bay of Islands. Situated just north of Auckland, the region is a hot spot for domestic and international visitors seeking nature-based and adventure tourism experiences. • Waitangi Treaty Grounds • Poor Knights Islands – diving and marine • Te Paki Sand Dunes and Ninety Mile Beach • Historic restaurants and cafés • Waipoua Forest (oldest tree in New Zealand) • Cape Reinga 300k 350k 450k 400k 500k 2018 2019 2020 2021 2022 2023 2024 2025 1.5m 1.8m 1.7m 1.6m 2.1m 1.9m 2.0m 2018 2019 2020 2021 2022 2023 2024 2025 300k 350k 450k 400k 500k 2018 2019 2020 2021 2022 2023 2024 2025 1.5m 1.8m 1.7m 1.6m 2.1m 1.9m 2.0m 2018 2019 2020 2021 2022 2023 2024 2025 International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 2018 2018 Purpose of visit (international) 2018 2018 Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN NORTHLAND OVERNIGHT VISITORS 2019 2.3M 18 OVERNIGHT VISITORS 2025 2.5M 18 INTERNATIONAL VISITORS 2025 19% 17 Holiday Business VFR Other Holiday Business VFR Other SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$460 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$710 40 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 41

AUCKLAND Key factors driving demand include: • A thriving visitor economy – New Zealand’s main international hub, with 30 international airlines connecting to 43 destinations • A buoyant international tourism market supported by international airline access (300+ direct flights per week) and passenger capacity • A strengthening business travel and convention market. The New Zealand International Convention Centre is due to open in late 2020, with capacity to host up to 4,000 delegates • Status as a major cruise hub for Oceania • Increasing popularity as a short-break leisure destination for Australian and domestic visitors • Recognition as one of the world’s most culturally diverse cities • Global city status that sees it host major international business, cultural and sporting events (including the upcoming 36th America’s Cup and the 2021 Asia Pacific Economic Cooperation forum). Auckland is New Zealand’s largest city, home to more than one-third of our population. The region welcomes more than 70 percent of visitors into the country through Auckland International Airport. Auckland consistently ranks high on benchmark measures with other international cities. It's an attractive destination, with a high quality of life and youthful urban energy, and is renowned for its cultural diversity. • Waiheke Island • Harbour Bridge Climb and Bungy • Kayak tours • Retail therapy • Food and wine tours • Urban cycling tours • Skytower Sky Jump (AJ Hackett) • Art and culture SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$912 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$2,022 International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Holiday Business VFR Other Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN AUCKLAND 2018 2018 2018 2018 2.0m 2.3m 2.9m 2.6m 2018 2019 2020 2021 2022 2023 2024 2025 4.1m 4.2m 4.3m 4.4m 4.6m 4.5m 4.7m 2018 2019 2020 2021 2022 2023 2024 2025 2.0m 2.3m 2.9m 2.6m 2018 2019 2020 2021 2022 2023 2024 2025 4.1m 4.2m 4.3m 4.4m 4.6m 4.5m 4.7m 2018 2019 2020 2021 2022 2023 2024 2025 OVERNIGHT VISITORS 2019 6.6M 18 OVERNIGHT VISITORS 2025 7.5M 18 INTERNATIONAL VISITORS 2025 38% 17 Holiday Business VFR Other 42 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 43

WAIKATO Key factors driving demand include: • A short 90-minute drive south from Auckland, Hamilton is the gateway to many of New Zealand’s adventure tourism and health and wellbeing attractions • A thriving business travel and convention market, fuelled by the region’s agricultural,

scientific, and academic hubs • Buoyant adventure tourism market, including surfing in Raglan, black-water rafting and caving in Waitomo, three of New Zealand's Great Rides, and scenic tours down the Waikato River • Hobbiton™ Movie Set – attracting 550,000+ visitors to the region each year • The Coromandel's dramatic forest park, surrounded by stunning beaches and coastal icons. The mighty Waikato, with its metropolitan hub of Hamilton, is situated in the central North Island. The area is renowned for its natural beauty (as made famous by The Lord of the Rings and The Hobbit trilogies), powerful history, adventure tourism (caving, black-water rafting, surfing), sporting prowess, business innovation and creativity. 600k 650k 700k 750k 800k 850k 2018 2019 2020 2021 2022 2023 2024 2025 3.0m 3.1m 3.2m 3.3m 3.4m 3.6m 3.5m 2018 2019 2020 2021 2022 2023 2024 2025 3.0m 3.1m 3.2m 3.3m 3.4m 3.6m 3.5m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Hobbiton™ Movie Set • Waitomo Glowworm Caves • Learn to surf in Raglan • High tea at Zealong Tea Estate • Sanctuary Mountain Maungatautari • Hamilton Gardens • Fish, dive, hike and bike the Coromandel

International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN WAIKATO OVERNIGHT VISITORS 2019 3.9M 18 OVERNIGHT VISITORS 2025 4.4M 18 INTERNATIONAL VISITORS 2025 19% 17 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$714 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$484 Holiday Business VFR Other Holiday Business VFR Other 44 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 45 BAY OF PLENTY Key factors driving demand include: • A relaxed lifestyle – the heart of the Bay of Plenty experience – shaped by renowned coastlines and natural environments • Excellent transport infrastructure – two regional airports with daily domestic flights and increasing capacity, ferry services, bus services, and a thriving port • Status as a major cruise hub • International health and wellness facilities • Sunny, warm micro-climate providing perfect growing conditions for local produce • Thriving hospitality scene including craft breweries • Growing accommodation options • 125 kilometres of stunning beaches and nature walks. The Bay of Plenty is a unique destination with a stunning natural environment (mountains, forests, oceans and beaches), Māori culture, and premium fresh produce and wine. 200k 220k 240k 260k 300k 280k 2018 2019 2020 2021 2022 2023 2024 2025 1.7m 1.8m 1.9m 2.0m 2.2m 2.1m 2018 2019 2020 2021 2022 2023 2024 2025 200k 220k 240k 260k 300k 280k 2018 2019 2020 2021 2022 2023 2024 2025 1.7m 1.8m 1.9m 2.0m 2.2m 2.1m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Swim with dolphins • Waimarino Kayak Tours • Wildlife coastal cruises • Health and wellness retreats International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN BAY OF PLENTY OVERNIGHT VISITORS 2019 2.2M 18 OVERNIGHT VISITORS 2025 2.4M 18 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$948 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$439 INTERNATIONAL VISITORS 2025 12% 17 Holiday Business VFR Other Holiday Business VFR Other 46 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 47 2018 2018 ROTORUA Key factors driving demand include: • Strong international and domestic visitation – a hugely popular drawcard for international visitors, particularly the Chinese market • Ranked fourth best destination in the world for travel experiences (TripAdvisor, 2018) and featured in the 2018 list of New York Times' Top Places to Visit • Regarded as one of the best mountain biking locations in the world • Thriving business events and convention market • Central North Island location with close proximity to the large Auckland domestic market • Development of visitor infrastructure, with notable projects including improvements at Te Puia (home of the famous Pohutu Geyser) and the creation of a premium-quality health and wellness tourism centre on the Rotorua lakefront. Rotorua is one of New Zealand's leading tourist destinations, with extraordinary geothermal activity, spectacular geysers and natural hot springs, 18 beautiful lakes, rich Māori culture and arts, and adventure tourism. 2018 2019 2020 2021 2022 2023 2024 2025 1.2m 1.3m 1.4m 1.5m 1.6m 2018 2019 2020

2021 2022 2023 2024 2025 750k 900k 1.05m 1.35m 1.20m 2018 2019 2020 2021 2022 2023 2024
 2025 1.2m 1.3m 1.4m 1.5m 1.6m 2018 2019 2020 2021 2022 2023 2024 2025 750k 900k 1.05m
 1.35m 1.20m 2018 2018 • Traditional Māori villages • Adventure at Velocity Valley • Geothermal
 parks • White-water rafting • Rotorua Canopy Tours • Redwoods Treewalk • Mountain biking •
 Polynesian Spa • Skyline Rotorua • Whakarewarewa Forest • Rainbow Springs and Agrodome
 International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit
 (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN ROTORUA
 OVERNIGHT VISITORS 2019 2.4M 18 OVERNIGHT VISITORS 2025 2.8M 18 INTERNATIONAL VISITORS
 2025 45% 17 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$377 SPEND PER OVERNIGHT
 DOMESTIC VISITOR 2019 \$321 Holiday Business VFR Other Holiday Business VFR Other 48 | Invest in
 New Zealand Tourism Invest in New Zealand Tourism | 49 TAUPŌ Key factors driving demand include:
 • Strong domestic visitation due to its central location and proximity to the large Auckland and
 Wellington markets • Proximity to the popular Ruapehu ski fields • Growing profile internationally –
 popular destination for the Australian market • Tongariro National Park, a World Heritage Site • A
 comprehensive range of adventure experiences and relaxing health and wellness activities including
 jet boating, bungy jumping and skydiving • Geothermal areas including hot pools. Taupō is defined
 by its natural environment – including its spectacular lake (the largest in New Zealand), beautiful
 forests, ancient volcanoes, ski fields, and geothermal attractions. It houses New Zealand's most
 visited and photographed natural attraction, Huka Falls. 450k 500k 550k 600k 700k 650k 2018 2019
 2020 2021 2022 2023 2024 2025 1.20m 1.50m 1.65m 1.35m 2018 2019 2020 2021 2022 2023 2024
 2025 450k 500k 550k 600k 700k 650k 2018 2019 2020 2021 2022 2023 2024 2025 1.20m 1.50m
 1.65m 1.35m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 SPEND PER
 OVERNIGHT DOMESTIC VISITOR 2019 \$295 • Volcanic, wine, and craft beer tours • Whitewater
 rafting on the Tongariro River • Riding the Great Lake Trail • Huka Falls • Hiking the Tongariro Alpine
 Crossing • Geothermal pools • Ski fields • Māori cultural tours • Mountain biking • Fly fishing •
 Adrenaline activities – jet boating, bungy and skydiving • Lake cruises, fishing and watersports
 International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit
 (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN TAUPŌ OVERNIGHT
 VISITORS 2019 2.1M 18 OVERNIGHT VISITORS 2025 2.3M 18 INTERNATIONAL VISITORS 2025 29% 17
 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$397 Holiday Business VFR Other Holiday
 Business VFR Other 50 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 51 Key
 factors driving demand include: • Excellent transport options – regional airport and driving distance
 from Auckland and Wellington • New airport terminal currently in development • An increasing
 number of attractions that are easily accessible • Accommodation availability and range of options
 from boutique hotels through to backpackers, motels and hotel chains • Major regional development
 in progress – the Mounga ki Moana Taranaki Crossing Experience • Extension of the world-class
 rainforest garden Pukeiti and the Kaitake Trail segment linking the garden to the coast • World-class
 food and beverage options and expanding food tourism offerings. Judged by Lonely Planet as the
 second top region in the world in 2017, Taranaki is a special part of New Zealand famed for its unique
 natural environment and laid-back, relaxed but sophisticated culture. From Mount Taranaki, to the
 dozens of surf breaks that wrap around the region's coast only 30 minutes away, Taranaki offers a
 wide variety of attractions including world-class art galleries, renowned parks and gardens,
 fascinating museums and tours featuring everything from food to stories of the region's vivid history.
 TARANAKI 75k 90k 105k 120k 135k 2018 2019 2020 2021 2022 2023 2024 2025 750k 800k 775k 875k
 850k 825k 2018 2019 2020 2021 2022 2023 2024 2025 75k 90k 105k 120k 135k 2018 2019 2020
 2021 2022 2023 2024 2025 750k 800k 775k 875k 850k 825k 2018 2019 2020 2021 2022 2023 2024
 2025 2018 2018 2018 2018 • Mount Taranaki and Egmont National Park • Touring routes: The
 Forgotten World Highway and Surf Highway 45 • The Len Lye Centre • Govett-Brewster Art Gallery •

Pouakai Crossing • Coastal walkway • Museums rich in cultural history – Puke Ariki and Tawhiti • Magnificent gardens • Tours – food, cultural and historic • Extensive event calendar International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN TARANAKI OVERNIGHT VISITORS 2019 922K 18 OVERNIGHT VISITORS 2025 1M 18 INTERNATIONAL VISITORS 2025 13% 17 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$816 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$402 Holiday Business VFR Other Holiday Business VFR Other 52 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 53 Key factors driving demand include: • Excellent transport options – regional airports and driving distance from Auckland and Wellington • Visitors spend more than \$652 million a year in Hawke’s Bay and \$197 million a year in Gisborne (YE February 2019) • Significant domestic tourism share – 70 percent in Hawke’s Bay (80 percent for Gisborne) • Art Deco Festival, with tens of thousands flocking to participate in the week-long event, in addition to year-round tours • Strong connection to iwi – land, history, and living culture. Tairāwhiti Gisborne is the first city in the world to see the sun each day. The region is known for its world-class surf beaches, quality vineyards, groves of citrus and popular activities including fishing, diving, cycling, mountain biking and golf. Hawke’s Bay is New Zealand’s Art Deco capital as well as a leading producer of red wines and stunning chardonnays. The region is also known as the “fruit bowl” of New Zealand for its abundance of fresh fruit, vegetables and grapes. TAIRĀWHITI GISBORNE AND HAWKE’S BAY 225k 250k 275k 300k 400k 375k 325k 350k 2018 2019 2020 2021 2022 2023 2024 2025 1.2m 1.3m 1.4m 1.5m 1.6m 2018 2019 2020 2021 2022 2023 2024 2025 225k 250k 275k 300k 400k 375k 325k 350k 2018 2019 2020 2021 2022 2023 2024 2025 1.2m 1.3m 1.4m 1.5m 1.6m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Vineyards and wine trails • Surf breaks • Mount Hikurangi tours • Diving and marine tours • Horse riding adventures • Te Mata Peak • Lake Waikaremoana International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES TAIRĀWHITI GISBORNE AND HAWKE’S BAY SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$669 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$416 OVERNIGHT VISITORS 2019 1.8M 18 OVERNIGHT VISITORS 2025 2.0M 18 INTERNATIONAL VISITORS 2025 20% 17 Holiday Business VFR Other Holiday Business VFR Other 54 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 55 Key factors driving demand include: • More than \$1 billion in visitor spend in Manawatu -Whanganui region in the year to June 2018 • Very strong domestic tourism – 80/20 split domestic/international visits. In the year ended February 2019, total visitor expenditure reached \$429 million in Palmerston North city, \$133 million in Whanganui and \$50m in Manawatu • Strong transport links – train, bus, and regional airport services • Provincial Growth Fund (PGF) package for Manawatu-Whanganui of \$48 million supporting transport, food and beverage, digital connectivity and tourism • Ruapehu district had \$213 million of visitor expenditure in YE February 2019. The Manawatu-Whanganui region can take you from majestic gorges, sweeping mountain ranges offering walks and hikes, glowworm caves and rugged west coast beaches to the heart of the city for coffee tasting, museums and art. The region is known for its outstanding natural environment including the Tongariro and Whanganui National Parks, volcanoes and the majestic Whanganui River. It’s also known for Māori culture, a world-class arts scene and rich heritage. Whanganui city has a creative, dynamic culture. MANAWATU-WhANGANUI 200k 220k 240k 260k 300k 280k 2018 2019 2020 2021 2022 2023 2024 2025 1.7m 1.8m 1.9m 2.0m 2.1m 2018 2019 2020 2021 2022 2023 2024 2025 200k 220k 240k 260k 300k 280k 2018 2019 2020 2021 2022 2023 2024 2025 1.7m 1.8m 1.9m 2.0m 2.1m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Whanganui River tours • New Zealand Rugby Museum • Te Manawa, Whanganui Regional Museum and Sergeant Gallery • Kite surfing and stand-up paddle boarding • Arapuke Mountain Bike Park • New Zealand’s only wildlife recovery centre • National Army Museum • Tongariro Alpine Crossing • Gondola including Knoll Ridge dining

experiences • Great Cycle Rides – Timber Trail and Mountains to Sea trail International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN MANAWATU-WHANGANUI SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$751 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$456 OVERNIGHT VISITORS 2019 2.2M 18 OVERNIGHT VISITORS 2025 2.3M 18 INTERNATIONAL VISITORS 2025 13% 17 Holiday Business VFR Other Holiday Business VFR Other 56 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 57 Key factors driving demand include: • Strong international and domestic visitation • Excellent transport infrastructure, with an international airport, port, train terminal, and bus services • A thriving cruise ship destination • A wide range of visitor attractions • Rated best place to live among 50 global cities (Deutsche Bank) • A strong economy buoyed by government presence, information technology and digital sector, and major screen production services • Neighbouring Wairarapa is a renowned food and wine region. The capital city of New Zealand, Wellington is famous for its vibrant arts scene, stunning harbour and surrounding ranges, world-class café and restaurant culture, active outdoor lifestyle, the national museum Te Papa Tongarewa, and its globally-recognised film sector. WELLINGTON AND WAIRARAPA 800k 900k 1.0m 1.1m 2018 2019 2020 2021 2022 2023 2024 2025 2.5m 2.6m 2.7m 2.8m 3.1m 2.9m 3.0m 2018 2019 2020 2021 2022 2023 2024 2025 800k 900k 1.0m 1.1m 2018 2019 2020 2021 2022 2023 2024 2025 2.5m 2.6m 2.7m 2.8m 3.1m 2.9m 3.0m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Museum of New Zealand Te Papa Tongarewa • Boutique vineyards in Wairarapa • Wildlife tours • Movie tours • World of WearableArt Awards Show • Wellington Cable Car • Craft beer capital of New Zealand • More cafés and restaurants per capita than New York International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN WELLINGTON AND WAIRARAPA Photo: Jeff McEwan SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$975 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$619 OVERNIGHT VISITORS 2019 3.8M 18 OVERNIGHT VISITORS 2025 4.2M 18 INTERNATIONAL VISITORS 2025 26% 17 Holiday Business VFR Other Holiday Business VFR Other 58 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 59 Key factors driving demand include: • Proactive regional tourism and economic development organisations focussed on investment in tourism • Key transport hub between North and South Islands – expanding port infrastructure and two ferry services • Strong incremental growth in port visits over the next three years • Marlborough’s increasing prominence as a cruise destination – \$18 million passenger spend in Marlborough for the 2017/2018 season, up 80 percent on previous season • Future cycle trail connectivity from Christchurch to Picton and on to Nelson • Coastal Pacific Train reinstatement and investment • Nelson is the busiest regional airport in New Zealand with over 400 scheduled flights per week. Forming the top of the South Island, the Nelson-Tasman and Marlborough regions are iconic tourist destinations. Nelson-Tasman is famous for its three stunning and highly accessible national parks, which offer myriad tourism activities including boat cruises, sea kayaking, skydiving, and luxury lodges. Marlborough is the country’s largest wine region and home to the world’s finest Sauvignon Blanc. The Marlborough Sounds are a haven for dolphins and seals and a boating mecca. NELSON AND MARLBOROUGH 400k 480k 640k 560k 2018 2019 2020 2021 2022 2023 2024 2025 1.20m 1.25m 1.35m 1.30m 1.45m 1.40m 2018 2019 2020 2021 2022 2023 2024 2025 400k 480k 640k 560k 2018 2019 2020 2021 2022 2023 2024 2025 1.20m 1.25m 1.35m 1.30m 1.45m 1.40m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Vineyards • Beaches • Abel Tasman National Park • Marlborough Sounds tours • Marine experiences • World of WearableArt & Classic Car Museum • Adventure parks • Mountain biking • Eco-based activities International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN NELSON AND MARLBOROUGH OVERNIGHT VISITORS 2019 1.8M 18 OVERNIGHT VISITORS 2025 2M 18

INTERNATIONAL VISITORS 2025 31% 17 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$751
 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$533 Holiday Business VFR Other Holiday Business
 VFR Other 60 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 61 Key factors driving
 demand include: • Excellent transport facilities, with an international airport, port, train and bus
 services • Strong economic development following the Christchurch earthquake rebuild • A gateway
 to South Island attractions and Antarctica • Growth in international tourism, driven by direct air
 routes to Asia, Australia, and connecting routes through the Middle East • The largest city in the
 South Island, Christchurch is the southern centre of commerce, creativity, entertainment, and
 adventure. Canterbury, including its main city Christchurch, is a vibrant destination that has
 transitioned from natural upheavals to become a modern, greener, creative region. Visitors
 experience a diverse offering – from the Pacific Ocean and wondrous marine life to adrenaline-
 pumping activities in the majestic Southern Alps. CANTERBURY 1.2m 1.3m 1.4m 1.5m 1.7m 1.6m
 2018 2019 2020 2021 2022 2023 2024 2025 3.0m 3.1m 3.2m 3.3m 3.5m 3.4m 2018 2019 2020 2021
 2022 2023 2024 2025 1.2m 1.3m 1.4m 1.5m 1.7m 1.6m 2018 2019 2020 2021 2022 2023 2024 2025
 3.0m 3.1m 3.2m 3.3m 3.5m 3.4m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018
 • Hanmer Springs Thermal Pools & Spa • Christchurch Adventure Park • Tekapo Springs and Hot
 Pools • The Aoraki/Mackenzie International Dark Sky Reserve • Tasman Glacier and Aoraki Mt Cook
 Village • Alps 2 Ocean Cycle Trail • TranzAlpine Rail Journey • Waipara Valley Wineries • Whale
 watching and dolphin swimming • Ski fields • Botanic Gardens International visitor forecast 2018-
 2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose
 of visit (domestic) KEY ACTIVITIES IN CANTERBURY Holiday Business VFR Other Holiday Business VFR
 Other OVERNIGHT VISITORS 2019 4.5M 18 OVERNIGHT VISITORS 2025 5.1M 18 INTERNATIONAL
 VISITORS 2025 32% 17 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$772 SPEND PER
 OVERNIGHT INTERNATIONAL VISITOR 2019 \$1,230 62 | Invest in New Zealand Tourism Invest in New
 Zealand Tourism | 63 Key factors driving demand include: • Strong transport offerings including the
 TranzAlpine Railway line that offers direct (and scenic) access from Christchurch • Strong
 international tourism visitation: guest nights increased 5.4 percent from 2015 to 1.3 million in 2016.
 This number includes 794,377 international guest nights (a rise of 7.6 percent from the year before)
 and 529,737 domestic guest nights (2.5 percent increase)19 • Eco-tourism is popular in this region •
 White heron (kotuku) and kiwi can be spotted with bird watching tours • A region rich in history,
 including New Zealand's gold rush and the only source of greenstone (pounamu) in the country, with
 the boulders found in the West Coast rivers • Spectacular from the air, it's an incredible way to see
 both the Fox and Franz Josef Glaciers as well as Aoraki Mount Cook, New Zealand's highest
 mountain. The West Coast, or 'the Coast' as locals call it, is an untamed natural wilderness of rivers
 and rainforests, glaciers and geological treasures. This region is 600 kilometres long and the
 environment and the rugged coastline form the backbone of its tourism offerings. The Great Coast
 Road stretching from Westport to Greymouth is one of New Zealand's most beautiful drives and has
 previously been ranked one of the top 10 coastal drives in the world by Lonely Planet. WEST COAST
 500k 600k 700k 800k 2018 2019 2020 2021 2022 2023 2024 2025 500k 520k 600k 580k 540k 560k
 2018 2019 2020 2021 2022 2023 2024 2025 500k 600k 700k 800k 2018 2019 2020 2021 2022 2023
 2024 2025 500k 520k 600k 580k 540k 560k 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018
 2018 2018 • Franz Josef Glacier and Fox Glacier • Punakaiki rocks • Hokitika scenic tours • Jet
 boating • Kayaking • Hokitika Wild Foods Festival • Franz Josef Hot Pools International visitor
 forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh
 Info Purpose of visit (domestic) KEY ACTIVITIES IN THE WEST COAST Holiday Business VFR Other
 Holiday Business VFR Other OVERNIGHT VISITORS 2019 1.2M 18 OVERNIGHT VISITORS 2025 1.4M 18
 INTERNATIONAL VISITORS 2025 57% 17 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$438
 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$458 64 | Invest in New Zealand Tourism

Invest in New Zealand Tourism | 65 Key factors driving demand include: • The world's southernmost wine region, renowned for its Pinot Noir – as well as premium fruit • Home to three of New Zealand's Great Cycle Rides and some of the best ski fields in the country • Excellent transport facilities – an international airport serviced by four international airlines offering attractive fares • Growing number of international and domestic visitors each year • Rapidly growing Chinese inbound visitor market, with a changing mix to higher-value FIT visitors • An expanding leisure and business event industry feeding year-round demand for activities and attractions. Queenstown and the Southern Lakes represent New Zealand's premier all-season visitor destination, offering a wide range of year-round experiences. The surrounding Central Otago landscape is unparalleled in New Zealand, with huge mountain ranges, wide valleys, crystal-clear lakes, fast-flowing rivers, and unspoilt, clear skies. QUEENSTOWN AND SOUTHERN LAKES 1.2m 1.3m 1.4m 1.6m 1.5m 1.8m 1.7m 2018 2019 2020 2021 2022 2023 2024 2025 1.25m 1.30m 1.35m 1.40m 2018 2019 2020 2021 2022 2023 2024 2025 1.2m 1.3m 1.4m 1.6m 1.5m 1.8m 1.7m 2018 2019 2020 2021 2022 2023 2024 2025 1.25m 1.30m 1.35m 1.40m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Queenstown Skyline Gondola • Jet boating • Vineyards • Ski fields • TSS Earnslaw boat trip • Bungy jumping • Spectacular landscapes International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN QUEENSTOWN AND SOUTHERN LAKES Holiday Business VFR Other Holiday Business VFR Other OVERNIGHT VISITORS 2019 2.6M 18 OVERNIGHT VISITORS 2025 3.1M 18 INTERNATIONAL VISITORS 2025 55% 17 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$958 SPEND PER OVERNIGHT INTERNATIONAL VISITOR 2019 \$1,455 66 | Invest in New Zealand Tourism Invest in New Zealand Tourism | 67 Key factors driving demand include: • There was significant growth in tourism spend in the region between 2015 and 2019, with an 18 percent increase for Southland and a 21 percent increase for Dunedin • Cruise visitation has grown significantly over recent years with 251,680 passengers visiting Dunedin in the 2018/19 season. New Zealand cruise expenditure statistics shows that the average earnings per cruise visitor in Dunedin has risen from \$134 in 2014/15 to \$193 in 2017/18. Bluff and Stewart Island are emerging cruise destinations • The international student population helps support the visiting friends and relatives (VFR) market. The contribution from these visits was worth \$6 million and 15 percent of VFR spend for Otago in the 2017/18 period • Regular major events in Dunedin are driving an increase in domestic visitation and spending. Forsyth Barr Stadium has a concert capacity of 36,000 and regularly sells out for major events • Product development investment continues to be strong with new accommodation and new regional attractions. This includes DOC experiences, new hotels, visitor centres, urban regeneration and air connectivity • The area is known for its cycle trails. The 150-kilometre Otago Central Rail Trail follows the route of the old railway and the Around the Mountains Cycle Trail Network links Queenstown to Southland, while other trails offer other unique experiences in the area. Otago and Southland are New Zealand's southernmost regions, offering a multitude of tourism attractions focussed on heritage, nature, food, recreation, and some of the world's rarest wildlife. The Southern Scenic Route takes in Coastal Otago, the Catlins and Southland and has seen significant growth from self-drive travellers. COASTAL OTAGO AND SOUTHLAND 700k 750k 800k 850k 1.05m 1.00m 900k 950k 2018 2019 2020 2021 2022 2023 2024 2025 1.40m 1.50m 1.55m 1.45m 2018 2019 2020 2021 2022 2023 2024 2025 700k 750k 800k 850k 1.05m 1.00m 900k 950k 2018 2019 2020 2021 2022 2023 2024 2025 1.40m 1.50m 1.55m 1.45m 2018 2019 2020 2021 2022 2023 2024 2025 2018 2018 2018 2018 • Fiordland and Stewart Island National Parks • Wildlife tours • Artisan food tours • Museums and art galleries • Taieri Gorge Railway • Larnach Castle • Cycle trails and walking tracks • Coastal, lake and river cruises • Seafood and Bluff oysters • The Catlins • Transport World and Classic Motorcycle heritage experiences International visitor forecast 2018-2025 Domestic visitor forecast 2018-2025 Purpose of visit (international) Source: Fresh Info Purpose of visit (domestic) KEY ACTIVITIES IN

COASTAL OTAGO AND SOUTHLAND Holiday Business VFR Other Holiday Business VFR Other
OVERNIGHT VISITORS 2019 2.2M 18 OVERNIGHT VISITORS 2025 2.6M 18 INTERNATIONAL VISITORS
2025 40% 17 SPEND PER OVERNIGHT DOMESTIC VISITOR 2019 \$701 SPEND PER OVERNIGHT
INTERNATIONAL VISITOR 2019 \$656 68 | Invest in New Zealand Tourism Invest in New Zealand
Tourism | 69 Now is the time to invest in New Zealand's tourism attractions The New Zealand
Government is working in partnership with local stakeholders to actively facilitate investment into
new tourism experiences and is ready to help. For qualified investors interested in new tourism
developments, the New Zealand Government can: • Educate on the tourism market opportunity by
providing detailed market information, supporting analysis, and indicative financial modelling
detailing forecast revenue streams and capital cost of development. • Facilitate introductions with
key private sector parties to help new market entrants secure the right expertise for developing
tourism attractions in New Zealand. • Provide introductions to project sponsors and local
Government, granting investors access to a robust pipeline of relevant, investor-ready tourism
projects. Government can also connect investors to the local support ecosystem and help them
understand any incentives available to encourage tourism development. New Zealand Government
collaborating entities New Zealand Trade and Enterprise (NZTE) NZTE is the New Zealand
Government's international business development agency, and focusses on helping companies grow
internationally — bigger, better, faster — for the good of New Zealand. NZTE is also the
Government's investment promotion agency, helping investors to identify opportunities and build
partnerships in New Zealand. With 50 offices worldwide, NZTE can often provide a local point of
contact in your region. NZTE is leading the investment arm of the New Zealand Government's
tourism strategy, with the aim of accelerating investment in commercial tourism attraction projects
in New Zealand. Tourism New Zealand (TNZ) TNZ is the Government organisation responsible for
marketing New Zealand to the world as a visitor destination. TNZ's work has been carried out under
the umbrella of the '100% Pure New Zealand' campaign for over two decades. The campaign was
originally conceived in 1999, and has evolved over the years to communicate the unique experiences
available to people who visit New Zealand. TNZ has 13 international offices and two in New Zealand.
TNZ provides quality international insights and research for the tourism sector and organisations
seeking to invest in commercial tourism projects in New Zealand. Ministry of Business, Innovation
and Employment (MBIE) MBIE plays a central role in shaping and delivering a strong New Zealand
economy. MBIE develops and delivers policy, services, advice and regulation to support business
growth and the prosperity and wellbeing of all New Zealanders. MBIE is the lead government agency
for tourism policy and is responsible for coordinating the government's tourism efforts across the
public sector. This includes research and data, monitoring TNZ, managing tourism-related
government funds, and destination management planning and partnership. Department of
Conservation (DOC) DOC is the organisation charged with conserving New Zealand's natural and
historic heritage. DOC's strategic goals are to provide conservation services and leadership to protect
and enhance New Zealand's natural and historic heritage, to contribute to New Zealand's economic,
social and cultural success, and to enhance the wellbeing of New Zealanders and international
visitors by encouraging and enabling people to connect and contribute to New Zealand's nature and
heritage. GET IN TOUCH – NEXT STEPS FOR INVESTORS READY TO INVEST? CONTACT: Anna
Wellingham Investment Manager New Zealand Trade and Enterprise anna.wellingham@nzte.govt.nz
+64 (9) 354 9151 Dylan Lawrence General Manager, Investment New Zealand Trade and Enterprise
dylan.lawrence@nzte.govt.nz Endnotes 1 Statistics New Zealand, Tourism Satellite Account 2018 2
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beam.usnews.com/ce/e7/fdca61cb496da027ab53bef37a24/171110-best-countries-overall-rankings-2018.pdf 15 International Visitor Survey (holiday visitors only), YE March 2015 16 Allied Market Research: Global Opportunity Analysis and Industry Forecast 2017-2023, alliedmarketresearch.com/adventure-tourism-market 17 Fresh Info, Percentage of International Visitors to Total Visitors Forecast 2025 18 Fresh Info, Total Overnight Visitor Forecast 2018-2025 19 Development West Coast, West Coast Economic Strategy 2018-2025, dwc.org.nz/live/work/invest/tourism Page 50 image: Facade of the Govett-Brewster Art Gallery / Len Lye Centre in New Plymouth. Credit: Patrick Reynolds While every effort is made to ensure the accuracy of the information contained herein, New Zealand Trade and Enterprise, its officers, employees, agents and collaborating entities listed in this document, accept no liability for any errors or omissions or any opinion expressed, and no responsibility is accepted with respect to the standing of any entities or individuals mentioned. New Zealand Trade and Enterprise reserves the right to reuse any general market information contained in its reports. It is recommended that you seek independent advice on any matter related to the use of the information. ISBN 978-1-98-855268-2 1 1B 1 1 1 1 10 11 12 12 12 14 16 22 2 2 25 A 25 25 27 26 26 30 4 3 30 3 31 23 39 32 32 41 5 38 5 30 2 1 47 4 46 1 30 33 18 1 1 1 29 5 24 28 3 54 3 2 56 57 2 58 50 2 5 2 38 35 35 2 49 4 2 36 43 3A 3 45 3 3 56 68 117 60 54 47 61 53 41 22 43 31 32 70 51 18 49 31 27 41 18 38 26 21 22 56 87 56 71 42 53 55 27 28 70 58 47 55 44 37 36 55 70 22 34 43 20 28 25 45 29 29 50 68 19 60 31 30 37 29 27 27 47 43 142 16 23 20 36 26 60 50 52 36 51 55 50 42 50 33 33 21 46 54 57 37 53 31 39 27 74 29 28 34 62 16 95 89 19 37 20 68 11 34 9 31 47 31 21 25 11 27 13 58 48 43 21 21 19 17 100 27 64 33 12 23 43 7 23 18 39 38 24 23 23 36 25 30 40 20 21 16 21 10 27 53 13 17 10 106 49 26 13 40 14 WAIHEKE IS. Cavalli Is Poor Knights Islands Hen and Chicken Islands Mokohinau Islands GREAT BARRIER ISLAND (Aotea Island) Mercury Islands (Iles d'Haussez) Kapiti Island MATAKANA ISLAND Motiti Island Moutohora Island Whakaari/White Island Manawatawhi / Three Kings Islands Mayor Is. (Tuhua) MAHIA PENINSULA Karikari Peninsula Cape Brett North Head Cape Rodney Cape Colville East Cape Cape Runaway Cape Turnagain Cape Kidnappers Cape Egmont North Cape (Otoa) Tauroa Point (Reef Point) Cape Palliser (Matakitakiakupe) 1731 Mangaweka Mitre 1571 Cape Reinga (Te Rerengawairua) COROMANDEL PENINSULA Cape Terawhiti Hikurangi 1752 Mt Tarawera 1111 Mt Taranaki or Mt Egmont 2518 Kaweka 1724 Ruapehu MtTongariro Mt Ngauruhoe Mt Maunganui Porirua Palmerston North Wanganui Manurewa Papakura HAMILTON Tauranga Rotorua New Plymouth Napier Hastings Tuakau Maungaturoto WELLINGTON Ruakaka Plimmerton Eastbourne AUCKLAND Taupo Masterton Kaitaia Kaikohe Dargaville Thames Cambridge Turangi Stratford Hawera Taihape Dannevirke Waipukurau Feilding Levin Mangonui Kaeo Kerikeri Paihia Russell Ruawai Mangawhai Port Fitzroy Matakana Warkworth Wellsford Waipu Maungatapere Kawakawa Rawene Helensville Whangaparaoa Coromandel Pukekohe Waiuku Tairua Whitianga Morrinsville Waihi Raglan Orewa Te Aroha Hicks Bay Te Kaha Inglewood Eltham Waverley Pipiriki Owhango National Park Waipawa Hunterville Kimbolton Takapau Ashhurst Bulls Marton Woodville Eketahuna Shannon Foxton Waitarere Otaki Paraparaumu Waikanae Carterton Greytown Featherston Martinborough Castlepoint Pahiatua Wainuiomata Opononi Marsden Bay Waitiki Landing Whangarei Tryphena Pauanui Lower Hutt Ratana Mahia Beach Te Puia Springs Muriwai Beach Piha Port Waikato Orakeikorako Waikaremoana Waipatiki Beach Havelock North Waimarama Himatangi Beach Mokau Whakahoro Waitomo Caves Lake Ferry Ninety Mi le Be ac h Ahipara North Shore C O R OM AN DE L R AN GE Upper Hutt Ngaruawahia Huntly Waihi

Beach Whangamata Katikati Paeroa Matamata Maketu Te Puke Matata Whakatane Ruatoria Te
 Karaka Tolaga Bay Opotiki Gisborne Wairoa Edgumbe Te Kuiti Mangakino Otorohanga Kawhia Te
 Awamutu Putaruru Tirau Kawerau Murupara Kaingaroa Forest Tokoroa Waitara Okato Opunake
 Manaia Patea Taumarunui Raetihi Waiouru Ohakune Whakapapa Village Whangaruru Harbour
 Waikato River Manawatu River Mercury Bay Lake Rotorua Palliser Bay Bay of Plenty Bay of Islands
 Spirits Bay Great Exhibition Bay South Taranaki Bight North Taranaki Bight Firth of Thames
 Whanganui R Rangitikei R Kaipara Harbour HAURAKI GULF C O O K S T R A I T Lake Waikaremoana
 Waipa R Waikato R Mohak a Riv er Hawke Bay Lake Taupo (Taupomoana) COROMANDEL FOREST
 PARK PIRONGIA F P WHIRINAKI FOREST PARK KAIMANAWA RAUKUMARA FOREST PARK KAWKA
 FOREST PARK RUAHINE FOREST PARK AORANGI F P TARARUA F P PUREORA FOREST PARK RIMUTAKA
 F P WHANGANUI NATIONAL PARK EGMONT N P TONGARIRO N P TE UREWERA NATIONAL PARK
 Ngunguru Te Kauwhata Awakino FOREST PARK Riversdale Beach Mt Norsewood Kinloch NEW
 ZEALAND TOURING MAP North Island Find us on Facebook, Twitter or Instagram by searching
 'purenewzealand' and start discovering. facebook.com/purenewzealand |
 twitter.com/purenewzealand | instagram.com/purenewzealand Aotearoa, New Zealand New
 Zealand's extraordinary geography offers a hugely diverse range of unique things to do, which makes
 it easy for you to actively experience the breathtaking landscape in all its purity. Whether you're
 kayaking, horse-riding, cycling, skiing, wine tasting, or simply relaxing you will be surrounded by
 world-class scenery second to none. Auckland & Northland Auckland is the largest city in New
 Zealand but it is the diversity of experiences in such close proximity that makes the region unique.
 From black sand beaches to amazing dining, rain forests to shopping. Views from the Sky Tower are
 amazing both day and night. The Waitangi Treaty Grounds and Kerikeri are great places to learn
 about New Zealand's history. Northland is well known for its magnificent native forests, including
 Waipoua, home of the giant kauri tree - Tāne Mahuta. Western North Island Visit the summit of
 snow-topped, volcanic, Mount Taranaki or explore national park that surrounds the mountain, or
 kayak and journey down the Whanganui River – New Zealand's longest navigable waterway. For an
 adrenalin rush try a rafting trip on the Rangitikei River. All three of the region's cities are known for
 their beautiful gardens, art galleries and innovative museums. Lower North Island The lower North
 Island is a great place for indulging your passions for fine wine, art, theatre and creative cuisine. Soak
 up New Zealand's traditional and contemporary culture in the museums, galleries and boutiques of
 the country's capital city, Wellington. Wairarapa offers a diverse experience for those who appreciate
 great wine and character accommodation. On the Kapiti Coast you'll find an island wildlife sanctuary,
 fantastic golf and artisan food producers. 790 363 276 277 456 148 242 352 212 649 762 71 231 971
 650 286 508 714 359 159 121 499 986 1000 186 800 479 299 348 567 187 189 299 271 917 829 29
 350 711 574 360 717 905 1121 672 113 117 438 799 485 296 604 996 1107 737 1058 748 387 637
 835 494 280 643 322 329 670 525 360 445 578 876 555 195 607 745 376 721 527 424 181 308 331
 255 616 189 520 508 544 682 361 321 265 360 658 294 105 413 849 921 630 211 324 600 863 561
 Blenheim Christchurch Dunedin Franz Josef Greymouth Haast Invercargill Milford Sound Mt Cook
 Nelson Picton Queenstown Te Anau Wanaka Westport 504 394 452 748 412 234 331 82 167 115 380
 370 195 819 127 829 296 694 178 312 249 86 205 308 434 452 624 325 216 242 853 225 296 417
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 675 170 Auckland Gisborne Hamilton Kaitia Napier New Plymouth Palmerston North Rotorua Taupo
 Tauranga Thames Wairoa Wanganui Wellington Whangarei Kilometres (km) Kilometres (km) North
 Island Themed Highways For more information visit newzealand.com/int/themed-highways Twin
 Coast Discovery Highway: This route begins in Auckland and travels north, tracing both coasts to
 Cape Reinga and back. Highlights include a procession of beautiful beaches, opportunities for fishing,

surfing, diving and dolphin encounters; cultural experiences at Waitangi; forest hikes and craft shopping. Pacific Coast Highway: Linking The Coromandel, Bay of Plenty and Eastland with Auckland in the north and Hawke's Bay in the south, covering spectacular coastlines, forest wilderness and grape growing districts. The cities of Tauranga, Gisborne, Napier and Hastings will satisfy your urge to wine, dine and shop. Thermal Explorer: Running between Auckland and Hawke's Bay and travelling through the volcanic centre of the island. Discover the Waitomo caves, geothermal areas in Rotorua and Lake Taupo, the amazing Tongariro National Park and Hawke's Bay Wine Country. When combined, the Pacific Coast Highway and Thermal Explorer are known as The Great New Zealand Touring Route. Forgotten World Highway: While it's only 150 kilometres long, the Forgotten World Highway (otherwise known as State Highway 43) is a memorable driving journey. Built on 19th century bridle paths, the highway connects Taumarunui to Stratford. The route wriggles its way over four mountain saddles, through an eerie one-way tunnel and along a sinuous river gorge. Surf Highway 45: The 105-kilometre highway that hugs the Taranaki coast is known as Surf Highway 45. One after another, magnificent surf beaches entice you to park the car and catch a wave. Classic New Zealand Wine Trail: This route links the regions that produce 70% of New Zealand's wine - Hawke's Bay, Martinborough and Marlborough - with capital city Wellington. Enjoy wonderful wine, innovative cuisine and character accommodation, with art galleries, live theatre and museums as a cultural bonus. Other North Island Scenic Routes These routes are not specifically signposted. Western Bays Highway: This peaceful route takes you through the heartland of the North Island, from Turangi, skirting the Pureora Forest Park. It then crosses an amazing landscape of pine forest and hydro lakes along the Waikato River, to the forestry town of Tokoroa. Volcanic Loop: From the trout town of Turangi, you can circle the volcanoes of Tongariro National Park. On a clear day, you'll enjoy spectacular views of the mountains and the surrounding volcanic terrain. The 'Desert Road' cuts across the desolate Rangipo Desert, returning through Turangi along the lakeside to Taupo. Hobbiton, Waikato Sara Orme Adam Bryce Cathedral Cove, Coromandel Fraser Clements Cruise on Waitemata Harbour, Auckland State Highway Main Road NZ Great Walks Road Distance International Airport Domestic Airport i-SITE Walks Golf Course Museum Vineyard Fishing Mine Game Fishing Skiing Mountainbiking Railway 1 34km Cartography by CoreLogic NZ Copyright © 2015 CoreLogic NZ Limited 65 67 6 73 73 60 6 6 1 63 1 1 7 7 6 69 7 70 8A 80 79 8 85 85 8 87 1 8 8 83 82 83 1 1 77 6 75 97 6 6 96 96 93 90 8 6 94 94 1 98 94 95 99 1 1 28 74 45 31 75 92 52 26 24 56 46 82 88 68 41 78 20 38 48 41 40 34 50 44 10 83 19 45 83 62 59 32 19 50 29 58 46 64 41 73 63 55 47 36 32 32 30 33 87 29 58 116 13 49 34 31 98 56 46 176 42 30 23 16 63 33 26 33 40 72 23 48 71 12 26 94 117 63 82 48 59 63 23 50 44 41 42 47 23 33 10 53 9 8 8 15 74 22 26 56 39 60 14 100 6 14 96 20 21 21 8 52 39 41 14 14 50 69 31 42 44 Titi/Muttonbird Islands SECRETARY ISLAND RESOLUTION ISLAND Arapawa Island RANGITOTO KE TE TONGA (D'Urville Island) Codfish Island (Whenuahau) Ruapuke Is. Solander Island (Hautere) Abut Head BANKS PENINSULA Lindis Pass Homer Tunnel S O U T H E R N A L P S Cape Campbell Cape Foulwind Nugget Point Kaikoura Peninsula Jackson Head Cape Farewell Farewell Spit South Cape/ Whiore Tapuae-o-Uenuku 2885 OTAGO PENINSULA Arthur's Pass Mt Aspiring/ Tititea 3033 Aoraki/Mt Cook 3754 Lewis Pass Haast Pass/ Tioripatea Puysegur Point West Cape Richmond Bluff Nelson Invercargill Kaiapoi Mosgiel Fox Glacier CHRISTCHURCH Timaru Motueka Picton Blenheim Kaikoura Takaka Havelock Seddon Ward Wairau Valley Hector Inangahua Hanmer Springs DUNEDIN Taranui Otira Makarora Cardrona St Bathans Punakaiki Maruia Springs Arthur's Pass Rotorua Marahau Mapua Lyttelton Blackball Collingwood Totaranui Goose Bay Portage French Pass (Anaru) Omarama Glenavy Omakau Mt Somers Ross Hokitika Greymouth Westport Murchison Reefton Cheviot Waipara Amberley Rangiora Culverden Oxford Lincoln Darfield Geraldine Methven Rakaia Leeston Fairlie Temuka Ashburton Akaroa Oamaru Waimate Kurow Twizel Wanaka Queenstown Arrowtown Clyde Alexandra Roxburgh Lawrence Palmerston Waikouaiti Karitane Hampden Otematata Ranfurly Cromwell Kumara Franz Josef/Waiau Aoraki/Mount Cook Halfmoon

Bay (Oban) Tuatapere Otautau Ohai Nightcaps Winton Lumsden Riversdale Riverton/Aparima
 Edendale Matura Gore Clinton Balclutha Tapanui Milton Owaka Te Anau Manapouri Milford Sound
 Mason Bay Port Adventure Port Pegasus Dagg Sound Doubtful Sound George Sound Karamaea Bight
 Pegasus Bay Waiau R. Hurunui R. Waimakariri River Waitaki River Taieri River Clutha River Haast River
 Hokitika River Big Bay Lake Tekapo Canterbury Bight Tasman Bay Dusky Sound Te Waewae Bay Lake
 Te Anau Lake Manapouri Lake Wakatipu Lake Ohau Lake Wanaka Lake Hawea Lake Pukaki Buller River
 Rakaia River Rangitata River Ashburton River/Hakatere Matura R Paterson Inlet/ Whaka a Te Wera
 Clutha River/ Mata-Au C O O K S T R A I T Golden Bay Clarence River Wairau River Lake Aviemore Lake
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 FOREST PARK VICTORIA FOREST PARK HANMER FOREST PARK FIORDLAND NATIONAL PARK NELSON
 NATIONAL ARTHUR'S PASS NATIONAL PARK MT COOK NATIONAL PARK MOUNT ASPIRING NATIONAL
 PARK AORAKI / WESTLAND/ TAI POUTINI NATIONAL PARK KAHURANGI NATIONAL PARK PAPAROA
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 Auckland Gisborne Hamilton Kaitia Napier New Plymouth Palmerston North Rotorua Taupo
 Tauranga Thames Wairoa Wanganui Wellington Whangarei Kilometres (km) Kilometres (km) Other
 South Island Scenic Routes These routes are not specifically signposted. Treasured Pathway: Enjoy a
 mix of history, hiking and hedonism as you discover heritage sites, vineyards, national parks and
 fabulous beaches. From the seaport town of Picton, travel across the top of the South Island to the
 sand dunes of Farewell Spit. The city of Nelson provides a dash of urban fun in the middle of the
 journey. Alpine Traverse: From Christchurch, enjoy awe inspiring views as you cross Arthur's Pass to
 the West Coast. Drive north to Reefton and take the Lewis Pass up to the spa resorts of Maruia
 Springs and Hanmer Springs. Journey back via Kaikoura, where the whales are waiting to meet you.
 West Coast Touring Route: Between Haast in the south and Karamaea in the north, the West Coast is
 one adventure after another. Watch the oceanic performance at Punakaiki's blow holes, shop for
 greenstone in Greymouth and Hokitika, explore old gold workings and hike over one of the massive
 glaciers. The Great Alpine Highway: From Christchurch, this route travels west across river plains
 before rising to traverse the Southern Alps through Porters Pass and Arthur's Pass National Park.
 Highlights include the impressive Waimakariri and Otira River gorges, the Otira Viaduct and the
 Castle Hill Rocks and Cave Stream Reserve. Southern Heritage Route: Head inland past Mount Hutt
 ski field and south to Lake Tekapo to see the beautiful Church of the Good Shepherd. Continue on to
 Mount Cook Village for alpine adventures. Drive on to Wanaka or Queenstown, then loop back to see
 the heritage architecture of Dunedin. Transport options in New Zealand Many destinations in New
 Zealand are just hours from each other. An extensive network of air, train and road services mean
 most places can be reached by public transport. Buses and coaches link up with rail and ferry

operators to take you the length of the country, and air travel is also available to most destinations. If you're going to drive around New Zealand (a popular option) driving tips, licences and permits, road rules, recommended trips and general information can all be found on newzealand.com

Nelson & Marlborough The top of the South Island has exceptionally beautiful terrain, with three national parks, the amazing Marlborough Sounds and lots of warm sunshine. The region boasts some of the finest Sauvignon Blanc in the world and is popular for hiking, cycling, sea kayaking, sailing and fishing. You'll also have many opportunities to improve your art collection – glass artists, painters, potters and sculptors welcome visitors into their studios. Canterbury & the West Coast

Canterbury's landscape is filled with green pastures and friendly country towns. The buzzing hub of the region, Christchurch, is a stylish modern city with a mix of interesting architecture and parks to relax in. Hanmer Springs is close by, boasting natural spa baths with stunning mountain views. Also not far is Kaikoura, famous for its crayfish and whale watching safaris. Approximately five hours' drive south west is the spectacular Aoraki Mount Cook and National Park, where you'll find the tallest peak in New Zealand. You can helicopter, skydive or hike over Fox and Franz Josef Glaciers or take in their beauty from a short walk to their bases. Punakaiki's pancake rocks are a must see. Southern Lakes

Queenstown and Wanaka's world famous beauty changes with every season. In winter the mountains are alive with snowboarders and skiers; in spring and summer, adventures on offer range from golf and horse trekking to bungy jumping and jet boating. A scenic drive south takes you to Fiordland where glacier-cut valleys half-filled with deep green water, cascading waterfalls and dense forest is only a bush walk or relaxing cruise away. Further south, Central Otago is rich in history and famous for fine wine. Coastal Otago & Southland

Lovers of history and nature will have plenty to see in the deep south. Oamaru, Dunedin and Invercargill have some of the best-preserved Victorian and Edwardian buildings in the Southern Hemisphere. There's stonework to admire, museums to explore and peaceful public gardens to relax in. The coastline and Stewart Island have amazing natural attractions like the Moeraki boulders, little blue penguins and the royal albatrosses and fur seals. Stewart Island is just a ferry ride from Bluff and offers cage diving with great white sharks for those who like to take a walk on the wild side.

South Island Themed Highways For more information visit newzealand.com/int/themed-highways

The Inland Scenic 72 Route: Perfect for travellers who like to get off the main highways and find real rural life. Starting at Amberley, in north Canterbury, the route links to State Highway 1 at Winchester. There are fabulous views of the Southern Alps on one side of the road, complemented by the green serenity of the Canterbury Plains on the other.

Alpine Pacific Triangle: This route takes you to the wine and food experiences of Waipara, the spa delights of Hanmer Springs and the marine mammal encounters of Kaikoura. Between destinations, you'll enjoy beautiful country scenery.

Southern Scenic Route: From historic Dunedin city, follow the wild southern coast to Invercargill, then continue north-west to Te Anau before ending at Queenstown. Highlights include wildlife encounters along The Catlins coast, hiking the Tuatapere Hump Ridge Track, cruising Fiordland and walking the Milford Track - one of New Zealand's 'Great Walks'.

Mike Heydon Blenheim, Marlborough STEWART ISLAND/ RAKIURA Penguin Place Yellow-eyed penguin, Southland Lake Pukaki, Canterbury Miles Holden

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State Highway

Main Road NZ Great Walks Road Distance International Airport Domestic Airport i-SITE Walks Golf Course Museum Vineyard Fishing Mine Game Fishing Skiing Mountainbiking Railway

1 34km Otago 9 8 7 6 5 2 1 4 3 Fiordland Mackenzie West Coast Canterbury Marlborough Wellington Taranaki Hawke's Bay Eastland Waikato Northland Nelson Tasman Southland

AUCKLAND WELLINGTON CHRISTCHURCH DUNEDIN HAMILTON ROTORUA QUEENSTOWN Timaru Hokitika Westport Greymouth Blenheim Kāpiti Coast Napier New Plymouth Whanganui Gisborne Taupō Whangarei Kerikeri Palmerston North Nelson Tauranga Aoraki Mount Cook Lake Tekapo/Takapō Wānaka Oamaru Te Anau Fox Glacier Milford Sound Paihia Thames Ohakune Whitianga Hanmer Springs Kaikōura

Invercargill AUCKLAND WELLINGTON CHRISTCHURCH DUNEDIN 1 HR 45 MINS 1 HR 1.5 HRS 1.5 HRS
 WHANGAREI AUCKLAND HAMILTON TAURANGA ROTORUA GISBORNE NAPIER PALMERSTON NORTH
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 ISLAND WĀNAKA KAIKŌURA QUEENSTOWN WHANGAREI 2 HRS 1.5 HRS 3 HRS 1 HR 3.5 HRS 3 HRS 2
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 Geothermal Beaches Food and Wine Heritage Hiking Kayaking Whale Watching Adventure Wildlife 9.
 Pure Southern Land Hosting a wide range of well-preserved Victorian and Edwardian buildings as
 well as spectacular rocky coasts, coastal Otago and Southland are the perfect place for those who
 appreciate historic architecture and rugged landscapes. When in Dunedin, visit the historic Speight's
 Brewery, or take a trip out to the majestic Larnach Castle. The coastline in this region is a treasure
 trove of incredible geological and wildlife sights, including the Moeraki Boulders, blue and yellow-
 eyed penguin, albatross and fur seal colonies. At the bottom of New Zealand, Rakiura Stewart Island
 is home to a many rare native species, making it perfect for nature walks. 7. Canterbury and West
 Coast Known for rolling green pastures, the jagged peaks of the Southern Alps and silvery beaches,
 Canterbury is home to world-class wildlife experiences, lush vineyards and pristine glacial lakes.
 Christchurch, the largest city and airport gateway in the South Island, is a place of intense creative
 energy as its residents rebuild in the wake of the 2011 earthquake. Drive north to Kaikōura to have to
 an up-close whale watching experience any time of year, and to feast on delicious fresh crayfish.
 Head to Aoraki Mount Cook National Park and fly by helicopter, or hike to the Fox and Franz Josef
 Glaciers. 5. Wellington and Wairarapa The lower North Island, which includes New Zealand's capital
 city of Wellington, is the country's creative hub. Indulge in fine wine, exquisite cuisine and coffee
 culture at a range of excellent eateries, or absorb some of New Zealand's art and culture at
 Wellington's many galleries and the Museum of New Zealand Te Papa Tongarewa. Film buffs will get a
 kick out of Wētā Cave, which features props and behind the scenes stories from a range of films
 including The Lord of the Rings and The Hobbit trilogies. Head north and you'll reach Wairarapa and
 the Kāpiti Coast, which are home to wildlife sanctuaries, wineries, world-class golf courses and
 artisanal food producers. 1. Northland and Auckland As New Zealand's largest and most
 cosmopolitan city, Auckland offers a wealth of cultural, artistic and dining attractions. Ride a glass-
 bottomed elevator to the observation deck of the 1000-foot-tall Sky Tower and take a horizon-
 spanning look over the city and the sail-studded Hauraki Gulf Marine Park. Take a cruise across
 Auckland's harbour and walk beneath the pōhutukawa canopy on Rangitoto Island, or enjoy a sunny
 day of food, wine and white sandy beaches on Waiheke Island. Travel north to arrive in winterless
 Northland, the spiritual home of New Zealand, and paddle a waka (Māori for boat) across the waters
 where Polynesian explorer Kupe first landed. 3. Pacific Coast Highway Follow this route from
 Auckland for a beach-infused road trip and take in the spectacular coastlines, forests and seaside
 villages of the Coromandel Peninsula. In Bay of Plenty, take a walk to the summit of Mauao Mt
 Maunganui for breath-taking views of the surrounding beaches, towns, nearby cafés and shops.
 Eastland's relaxed coastal life is popular with surfers and also offers authentic Māori cultural
 experiences. Travel south to Hawke's Bay for outstanding wines and art deco architecture in Napier.
 2. Thermal Explorer Highway Drive through the centre of the North Island and you'll see the beating
 geothermal heart of the country, passing crater lakes and volcanic cones that are the remnants of
 past eruptions. Starting south of Auckland, the highway runs through Hamilton then on to Waitomo;
 famous for its subterranean river rafting and glowworm caves. Step into movie history at
 Hobbiton™ near Matamata, seeing the movie set from The Hobbit Trilogy. At Rotorua ride a giant
 inflatable ball down a hillside and witness geothermal geysers, bubbling mud pools and Māori
 cultural performances. Further south at Tongariro National Park you'll find snow-capped mountains,
 fantastic tramping trails and ski fields. IMAGE Viaduct Harbour, Auckland Waipoua Forest, Northland

Hobbiton™ Movie Set Tours, Matamata Te Puia, Rotorua Waitomo Caves, Waitomo Mt Maunganui, Bay of Plenty Cathedral Cove, The Coromandel Hot Water Beach, The Coromandel 4. Western North Island The Western North Island is thrilling in all seasons, with Egmont National Park home to the snow-capped Mount Taranaki, which provides excellent skiing in winter and wonderful tramping trails. During summer and autumn the region boasts excellent surf beaches, great art galleries and always entertaining summer music festivals. To the east of the mountains New Zealand's longest navigable waterway, Whanganui River, is perfect for a guided kayak safari, or if you're looking for something a little more exciting you can brave the rapids of the Rangitikei River on a rafting trip. Whanganui National Park 6. Nelson and Marlborough Marlborough is the gateway to the South Island, with travellers ferrying across the Cook Strait and through the beautiful Marlborough Sounds. The area is renowned for its wineries, which are particularly noted for their world-class Sauvignon Blanc. Enjoy a tasting of award-winning vintages of years past and outstanding regional cuisine at on-site restaurants. Located just west of Marlborough, Nelson overlooks the stunning Tasman Bay and Abel Tasman National Park, replete with golden sand beaches and known for being one of the sunniest parts of New Zealand, it is perfect for hiking, cycling, kayaking, fishing or taking a relaxing cruise. 8. Southern Lakes Nestled in the heart of the Southern Alps where The Remarkables mountain range meets Lake Wakatipu, Queenstown is an adventurer's playground in every season. Bungy jump right where the activity was invented at Kawarau Bridge, or jet boat down the Shotover River. Spend an autumn day looking at relics from the gold rush at Arrowtown, take a trip to Wānaka for winter skiing, or embark on a scenic helicopter flight over the Mount Aspiring National Park. Explore the breath-taking natural wonders that are Milford and Doubtful Sounds, witnessing their spectacular beauty either, on the water or with a hike along the Milford Track. Whanganui River, Taranaki Mount Taranaki Castlepoint, Wairarapa Abel Tasman National Park, Abel Tasman The Great Taste Trail, Nelson Hooker Valley Track, Aoraki Mount Cook National Park Christchurch, Canterbury Kaikōura, Canterbury Shotover River, Queenstown Milford Sound, Fiordland Treble Cone, Wānaka Otago Peninsula, Dunedin Blue Penguin Colony, Oamaru Waitangi Treaty Grounds, Northland Kelburn Hill, Wellington Parrot dog, Wellington Marlborough Sounds, Marlborough Larnach Castle, Dunedin Aotearoa New Zealand New Zealand has an amazing range of experiences that are all within arm's reach of everyone who visits. You'll find a unique embrace of people, culture and landscapes that will take you on your journey and create everlasting stories. Aotearoa New Zealand is a destination for the curious ones – for those willing to seek, New Zealand offers everything, from dramatic natural scenery to rich Māori culture and vibrant cities. Its extraordinary geography offers a hugely diverse range of unique things to see and do. Hike through lush rainforests near glaciers, soak in geothermal hot pools surrounded by snow-capped mountains, and relax on perfect white sand beaches that stretch for miles. Sail on turquoise waters dotted with picturesque islands, or cruise through towering fiords past cascading waterfalls. End each perfect day indulging in award-winning cuisine paired with wine from local vineyards that stretch through every region. Gardens Taikihepa/ Big South Cape Island Pihititi Port Pegasus/ Kauri LAKE SUMNER FOREST PARK CRAIGIEBURN FOREST PARK MT RICHMOND FOREST PARK CATLINS FOREST PARK VICTORIA FOREST PARK HANMER FOREST PARK COROMANDEL FOREST PARK PIRONGIA FOREST PARK KAIMAI-MAMAKU FOREST PARK WHIRINAKI FOREST PARK KAIMANAWA FOREST PARK RAUKUMARA FOREST PARK KAWEKA FOREST PARK RUAHINE FOREST PARK AORANGI FOREST PARK TARARUA FOREST PARK PUREORA FOREST PARK REMUTAKA F P FIORDLAND NATIONAL PARK NELSON LAKES NATIONAL PARK ARTHUR'S PASS NATIONAL PARK MOUNT COOK NATIONAL PARK MOUNT ASPIRING NATIONAL PARK AORAKI / WHANGANUI NATIONAL PARK EGMONT NATIONAL PARK TONGARIRO NATIONAL PARK WESTLAND/ TAI POUTINI NATIONAL PARK KAHURANGI NATIONAL PARK PAPAROA NATIONAL PARK ABEL TASMAN NATIONAL PARK TE UREWERA RAKIURA NATIONAL PARK Aorere Riv er M otueka Riv er P elorus Riv er B uller R Aw atere Riv er Clarence Riv er B uller Riv er Ahaura Riv er Inangahu a Riv er M aruia Riv er

M atakitaki R Clarence Riv er W aiau Riv er E sk River W ilberforce R Rakaia River North Br S outh Br
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 Anau Lake Wakatipu Lake Mahinerangi Lake Poteriteri Lake Hauroko Lake Monowai Lake Manapouri
 Lake Moeraki North Mavora Lake Lake Kaniere Lake Mapourika Lake Hakapoua Kapara Te Hau Lake
 Roxburgh L Rotoehu Lake Ohakuri L. Wairarapa Lake Whangape Lake Rotoma Lake Rerewhakaaitu
 Lake Waikareiti Lake Omapere Lake Arapuni L Rotoiti L Rotorua Lake Moawhango L Onoke Lake
 Maraetai Lake Grassmere/ (Taupomoana) Lake Taupō Lake Ellesmere (Te Waihora) L Okataina L
 Tarawera L Rotomahana Lake McKerrow/ Whakatipu Waitai Lake Waikaremoana Lake Rotoaira Lake
 Waikare Lake Brunner (Moana) Lake Coleridge Dusky Sound Mason Bay Port Adventure Preservation
 Inlet Breaksea Sound Dagg Sound George Sound KARAMEA BIGHT PEGASUS BAY CANTERBURY BIGHT
 Big Bay Te Waewae Bay TASMAN BAY GOLDEN BAY Doughboy Bay Whanganui Inlet Martins Bay
 Thompson Sound Nancy Sound Charles Sound Caswell Sound Bligh Sound Sutherland Sound Chalky
 Inlet Milford Sound/ Whaka a Te Wera Hokianga Harbour Kawhia Harbour HAWKE'S BAY Poverty Bay
 Palliser Bay SOUTH TARANAKI BIGHT NORTH TARANAKI BIGHT Takou Bay Bay of Islands Doubtless Bay
 Spirits Bay Rangaunu Bay HAURAKI GULF Firth of Thames Mercury Bay Manukau Harbour Kaipara
 Harbour Ahipara Bay Whangape Harbour Tom Bowling Bay Parengarenga Harbour Bream Bay
 Ngunguru Bay Colville Channel Great Exhibition Bay BAY OF PLENTY Doubtful Sound/ Patea Piopiotahi
 Okahu Jackson Bay/ Paterson Inlet/ Queen Charlotte Sd (Tataranui) F O V E A U X S T R A I T C O O K S
 T R A I T 2 Kepler Track Milford Track Hollyford Track Heaphy Track Routeburn Track Greenstone Track
 Waikaremoana Track Tongariro Northern Circuit Rakiura Track Abel Tasman Track Ruapuke I Ernest Is
 Codfish I Dog I Rugged I Centre I Chalky I RESOLUTION I SECRETARY I Pepin I Stephens I Rangitoto Is
 RANGITOTO KE TE TONGA (Whenuahou) Kapiti I Mana I Portland I Pourewa I Motiti I MATAKANA I
 Karewa I GREAT BARRIER ISLAND WAIHEKE I Kawau I Tiritiri Matangi I Motuora I Cuvier I Poor Knights
 Is Mokohinau Is Stephenson I Cavalli Is Hen and Chicken Is The Aldermen Is (Aotea Island)
 Whakaari/White I Tuhua/Mayor I Mercury Islands (Iles d'Haussez) (D'Urville Island) Karewa/ Gannet
 Island Great Mercury I (Ahuahu) Red Mercury I (Whakau) Ponui Island (Chamberlins Island) Slipper
 Island (Whakahau) Moutohora/Whale I Titi/Muttonbird Is Solander I (Hautere) Arapawa I Rakitu I
 (Arid I) Bare I (Motu-o-Kura) Manawatawhi / Great I Hauturu / Little Barrier Island North Cape (Otou)
 Tauroa Point (Reef Point) Albatross Point Cape Palliser (Matakitakiakupe) Kahurangi Point Jackson
 Head Abut Head Cape Farewell Farewell Spit Cape Campbell Kaikōura Peninsula BANKS PENINSULA
 Nugget Point OTAGO PENINSULA Ship Cove Puysegur Point West Cape Pahia Point Cape Foulwind
 Cape Maria van Diemen Karikari Peninsula Cape Brett Bream Head Cape Colville North Head Cape
 Runaway East Cape MĀHIA PENINSULA Table Cape Cape Kidnappers Cape Turnagain CAPE EGMONT
 COROMANDEL PENINSULA Cape Rodney Gable End Foreland Cape Reinga (Te Rerengawairua) Ninety
 Mile Beach Young Nicks Head (Te Kuri) Cape Terawhiti W A K A M A R A M A R A R I C H M O N D R A
 N G E S E A W A R D K A I K O U R A R A M A T I R I R A V I C T O R I A R A P U K E T E R A K I R A T W O T
 H U M B R A K I R K L I S T O N R A T H E H U N T E R S H I L L S H A W K D U N R A O L I V I N E R A N G

EBENOHAURANGETUTAMOERACOROMANDELRANGEIKAWHENUARANG
ERAUKUMARARANGEKAWEKARANGERUAHINERANGETARARUARANGEH
AUHUNGAROARAINLANDKAIKOURARASOUTHERNALPS/KATIRITIRIOTE
MOANASPENSERMNTNSDUNSTANMTNSGARVIEMTNSEYREMTNSLIVINGS
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RAAMURIRARAGLANRAPAPAROARARICHARDSONMTNSTASMANMTNSH
UIARAURANGE Homer Tunnel Lewis Pass Lindis Pass Arthur's Pass Haast Pass/ Tioripatea 2875
2781 2650 2645 3033 2516 2885 Manakau 2608 2300 2340 Tapuae-o-Uenuku 3754 Mt Whitcombe
Mt D'Archiac Mt Arrowsmith Mt Franklin Mt Una 2120 Pinnacle Mt Aspiring/ Mt Brewster Mt Ward
Mt Cook 1756 Mt Richmond Mt Uriah 1525 2275 Mt Rolleston 2305 Mt Misery 1643 Mt Pisgah 2088
Mt St Bathans 1577 Telford Peak 2723 Mt Tutoko 1713 Mt Ward 750 Mt Allen Aoraki / 1967 2797 Mt
Taranaki or Mt Egmont 2518 Mt Ruapehu Mt Tongariro 2287 Mt Ngauruhoe 1111 Mt Tarawera 1724
Kaweka 1752 Hikurangi Makorako 1726 1731 Mangaweka 1571 Mitre Tititea Pohara Fox Glacier
Milford Sound Ahaura Athol Balfour Cardrona Drummond Fortrose Marahau Maruia Springs
Papatowai Punakaiki Totaranui Curio Bay Waitahuna Motunau Beach Colac Bay Springs Junction
Haast Aoraki/ Mount Cook Village Okiwi Bay Rai Valley Port Pungo Upper Takaka Wairau Valley
Little Wanganui Tapawera Mokihinui Seddonville Rotorua Charleston Kekerengu Goose Bay
Rotherham Parnassus Ikamatua Gladstone Ruatapu Lake Coleridge Cass Little Akaloa Little
Duvauchelle River Chertsey Rangitata Woodbury Mayfield Peel Forest Cave St Andrews Makikihi
Willowbridge Morven Aviemore Duntroon Ngapara Garston Ettrick Ophir Waipiata Heriot
Waimahaka Mandeville Greenhills Waitaki Bridge Makarora Otirehua St Bathans Luggate Monowai
Clifden Dipton Fairfax Castle Hill Village / Oraka Arthur's Pass Ormond Plimmerton Awakeri
Castlepoint Kaiwaka Karapiro Kaukapakapa Lake Ferry Manutuke Reporoa Waikaremoana Waikeria
Waimarama Waipiro Bay Whatatutu Whakapapa Village Te Kao Te Wairoa Piopio Huia Orakeikorako
Baylys Beach Paparoa Waiwera Mokau Raurimu Rhotu Pipiriki Mataroa Fordell Tinui Kairakau Beach
Mohaka Muriwai Ocean Beach Ohingaiti Te Hapua Waitiki Landing Waipapakauri Beach Houhora
Heads Tokerau Beach Taupo Bay Whangaroa Mangamuka Bridge Herekino Kohukohu Whangaruru
North Whangaruru South Whananaki Matapouri Kaihu Pahi Tinopai Langs Beach Shelly Beach Hot
Water Beach Tapu Opoutere Whiritoa Glenbrook Beach Maramarua Tahuna Gordonton Rotowaro
Aotea Taharoa Marokopa Aria Ongarue Mapiu Awakino Matiere Tongaporutu Tahora Warea
Pungarehu Kapuni Whangamomona Whakahoro Jerusalem Manutahi Awahuri Omaio Waihou Bay
Hicks Bay Motu Matawai Te Reinga Waingake Ruatahuna Opoutama Raupunga Waipatiki Beach
Whanarua Bay Elsthorpe Apiti Rangiwhia Wallingford Mangamaire Mauriceville Ohau Pirinoa
Dawson Falls Waitomo Caves Aranga Okiato Anakiwa Franz Josef/Waiau Port Fitzroy French Pass
(Anaru) Okarito Tarras Waitangi Whataroa Collingwood Karamea Waiau Hawarden Waikari
Springfield Sheffield Harihari Naseby Middlemarch Outram Mossburn Burnham Glenorchy Hinds
Kingston Moana Orepuki Riwaka Thornbury Waikaia Waikaka Diamond Harbour Waikuku Beach Kaka
Point Lake Hāwea Weston Wallacetown St Arnaud Tekapo Benneydale Sanson Hikurangi Te Kauwhata
Normanby Turakina Mangaweka Norsewood Tikokino Ongaonga Pōrangahau Riversdale Beach Bay
View Hokio Beach Rotoiti Silverdale Te Awanga Tikitiki Wairakei Waitahanui Clive Okaihau Awanui Te
Kopuru Drury Arapuni Tokomaru Bay Nūhaka Tuai Lake Rotoma Rangiriri Riverhead Te Puru Kaiaua
Kinloch Ngawi Leigh Waharoa Waitotara Pongaroa Te Horo Pataua Parakai Stillwater Huapai Kumeu
CBD Ponsonby Parnell Newmarket Takapuna Mercer Meremere Waihou Horotiu Tokanui Whakamaru
Te Araroa Whakatu Minginui Motuoapa Ohura Manunui Longburn Glentunnel Hororata Kirwee
Taitapu Prebbleton Herbert Waiholā Pirongia Urenui Kaiteriteri Pareora Maheno Tokanui Manapouri
Renwick Kaiapoi Lyttelton Brightwater Wakefield Havelock Seddon Murchison Buller Gorge Leithfield
Rangiora Woodend Oxford Methven Rolleston Dunsandel Rakaia Leeston Southbridge Lincoln Belfast
Akaroa Kumara Twizel Arrowtown Clyde Otematata Kurow Ranfurly Hampden Palmerston Waikouaiti

Karitane Tairoa Head Roxburgh Tapanui Lawrence Kaitangata Owaka Clinton Wyndham Edendale Lumsden Ohai Nightcaps Tuatapere Otatau Riversdale Blackball Hector Inangahua Mapua Moeraki Omarama Otira Ward Pleasant Point Te Anau Maitua Takaka Reefton Ross Culverden Cheviot Amberley Darfield Fairlie Richmond Taranui Glenavy Runanga Bluff Mosgiel Port Chalmers Otatara Omakau Waikanae Ngongotaha Tryphena Tuakau Taneatua Paengaroa Owhango National Park Village Otane Foxton Beach Paekākāriki Kakahi Mangawhai Heads Matakana Mourea Muriwai Beach Omapere Opononi Piha Port Waikato Puhoi Tangimoana Te Rangiita Waitarere Kaingaroa Forest Kaponga Oneroa Rangitoto Mangōnui Ahipara Rawene Kawakawa Russell Moerewa Paihia Maungatāpere Waipu Ngunguru Ruakaka Wellsford Ruawai Maungaturoto Orewa Ngaruawahia Waitara Eltham Waihi Beach Ashhurst Woodville Kimbolton Shannon Coromandel Town Ngatea Ruatoria Edgecumbe Matata Te Kaha Maketu Tirau Kawhia Mangakino Tolaga Bay Te Karaka Okato Ōakura Ōpunake Manaia Patea Waverley Raetihi Ohakune Waipawa Takapau Hunterville Himatangi Beach Tokomaru Eketahuna Martinborough Te Puia Springs Māhia Beach Acacia Bay Mamaku Ratana Te Teko Rongotea Bell Block Haumoana Pukerua Bay Ormondville Ōhope Taipa Kawakawa Bay Orere Point Clarks Beach Eastbourne Snells Beach Mangawhai Point Omokoroa Beach Kaeo Clevedon Waipara Brighton Marsden Bay Onetangi Mt Somers Hanmer Springs Halfmoon Bay (Oban) Cape Reinga Alexandra Balclutha Waimate Wānaka Geraldine Hokitika Kaikōura Westport Picton Winton Milton Temuka Cromwell Kihikihi Tawa Pauanui Tairua Kaikohe Kerikeri Dargaville Helensville Paraparaumu Pukekohe Te Awamutu Carterton Greytown Featherston Pahiatua Waipukurau Taihape Waiouru Tūrangi Ōpōtiki Murupara Te Kuiti Katikati Te Aroha Otorohanga Raglan Whangamatā Whitianga Warkworth Foxton Inglewood Paeroa Putaruru Bulls Mauao/ Mount Maunganui Whangaparāoa Cambridge Havelock North Feilding Riverton/ Aparima Gore Queenstown Ōamaru Ashburton Greymouth Motueka Porirua Kaitia Manurewa Papakura Levin Taupō Tokoroa Thames Huntly Dannevirke Ōtaki Stratford Hāwera Wairoa Whakatāne Kawerau Te Puke Waiuku Morrinsville Matamata Waihi Marton Upper Hutt North Shore Taumarunui Wainuiomata Lower Hutt Nelson Invercargill Timaru Blenheim Whangārei Rotorua Hastings Whanganui Gisborne Masterton New Plymouth Napier Tauranga Palmerston North DUNEDIN CHRISTCHURCH AUCKLAND WELLINGTON HAMILTON Templeton Pūhiwaero South WestCape/ South Cape/ Whiore Maitua River Fletcher Bay Mt Hutt Rakaia Gorge Opihi River Rangitata River Hinds River Ashburton River/ Hakatere Rakaia River Akaroa Harbour Waimakariri River Gladstone Owahanga River Wairoa River Whangāehu River Waitotara River 1 1 10 11 12 12 1 1 12 14 16 1 17 18 1 1B 1 22 2 2 25 25A 25 27 26 26 29 23 24 1 5 30 4 3 3 31 39 28 32 32 3 5 38 38 5 30 2 30 34 33 36 30 43 45 3 3 54 50 2 5 2 4 1 1 49 3 3A 35 2 3 2 57 2 53 58 1 60 6 6 63 1 67 1 7 7 6 69 7 70 1 65 6 73 73 77 1 75 8A 80 79 8 8 83 82 83 1 6 8 6 96 96 93 85 85 90 8 8 6 94 94 87 1 1 98 97 6 94 95 99 1 1 6 56 47 46 4 41 35 59 1 Stewart Island/Rakiura THEMED

HIGHWAYS These routes are marked with distinctive brown road signs. For more information visit: newzealand.com/int/themed-highways NORTH ISLAND Twin Coast Discovery Highway: Recommend 6 Days This easy drive begins in Auckland tracing both coastlines as you venture through New Zealand's warmest region, Northland, and up to the top of Cape Reinga and back. Highlights include beautiful beaches dotted with our native trees, epic fishing, surfing and snorkelling plus beautiful forests and hiking. Be sure to greet Tāne Mahuta – the world's largest living Kauri tree and explore the Waitangi Treaty Grounds – one of Aotearoa's most historically significant sites. Pacific Coast Highway: Recommend 7 Days Travelling from Auckland to Napier, explore the spectacular coastal scenery along the East Coast of the North Island. This route follows the Pōhutakawa Coast, through Clevedon and around the Firth of Thames. As you journey along the Pacific Coast Highway you'll venture through the Coromandel, Bay of Plenty, Gisborne and the Hawke's Bay. If you're seeking stunning beaches, untouched wilderness and incredible wineries this is the route for you. Be sure to check out some of the local hot spots like Mauao Mt Maunganui and hunt down some of the best surf breaks in Aotearoa New Zealand. Thermal Explorer Highway: Recommend 6 days Delve into the volcanic heart

of the North Island, as you journey from Auckland to the Hawke's Bay. Along the way you'll discover the Waitomo caves and their glittering glow worms in the Waikato region. Experience geothermal wonders and rich Māori culture throughout Rotorua and Lake Taupō and enjoy the breath-taking Tongariro National Park and Hawke's Bay Wine Country. When combined, the Pacific Coast Highway and Thermal Explorer are known as The Great New Zealand Touring Route.

Forgotten World Highway: Recommend 2 Days New Zealand's oldest heritage trail, the 150km Forgotten World Highway (State Highway 43) is a remote journey that takes you through stunningly scenic untouched landscapes. Following ancient Māori trade routes and 19th century bridle paths, the highway connects Taumarunui, a town known for trout fishing, kayaking & jet boating to Stratford. The route wriggles its way over four mountain saddles, through an eerie one-way tunnel and along a sinuous river gorge, passing through the unique Republic of Whangamōmona.

Volcanic Loop: Recommend 5 Days From the trout town of Tūrangi, you can circle the volcanoes of Tongariro National Park by following state highways 47, 4, 49 and 1. On a clear day, you'll enjoy spectacular views of the mountains and the volcanic terrain that surrounds them. The stretch known as the 'Desert Road', which cuts across the desolate Rangipo Desert, is particularly memorable.

Surf Highway 45: Recommend 2 Days The 105km highway that traces the Taranaki coast is known as Surf Highway 45 for the countless surf breaks that can be found at the end of almost every road that leads to the coast. The top surf spots have some quirky names, like the Kumara Patch, Graveyards, Secret Spot and Green Meadows to mention a few. Close by you can grab a bite at a cosy café, or browse the region's collection of galleries, and artists' studios.

Manawatu Scenic Route: Recommend 2 Days A scenic alternative to State Highway One, embark on a journey through the heart of Aotearoa New Zealand's lower North Island. Explore hidden valleys, vast rolling farmland and ancient native forests as you visit the towns of Mangaweka, Āpiti and Ashhurst. Discover country cafés and pubs, heritage sites, galleries, and gardens, to scenic reserves, day walks, swimming holes, glow-worm caves, and camping spots. Experience the real Kiwi backcountry, meet the locals, and enjoy world-class scenery from the roadside.

Classic New Zealand Wine Trail: Recommend 7 Days Weaving through three major wine regions, the Classic New Zealand Wine Trail serves up unforgettable wine and food experiences along the 380km route, spanning the North and South Islands. This self-guided drive takes visitors through the Hawke's Bay, Wairarapa, and Marlborough, home to some 230 wineries. At the heart of the trail lies Wellington, New Zealand's capital, the perfect place for a culinary and cultural stopover. Enjoy stunning scenery, beautiful forest parks, buzzing nightlife and indulgent food experiences along the way.

SOUTH ISLAND Classic New Zealand Wine Trail: See details above.

Alpine Pacific Touring Route: The Alpine Pacific Touring Route takes you to the wine and food experiences of Waipara, the spa delights of Hanmer Springs and the marine mammal encounters of Kaikōura. Between destinations, you'll enjoy beautiful country scenery.

The Inland Scenic 72 Route: The perfect road journey for travellers who like to get off the main highways and find real rural life. The route starts at Amberley, in the north of the Canterbury region, and runs to Winchester, where it links to State Highway 1. There are fabulous views of the Southern Alps on one side of the road, complemented by the green serenity of the Canterbury Plains on the other.

The Great Alpine Highway: This coast-to-coast route traverses the Southern Alps. From Christchurch, the 255-kilometre route follows State Highway 73 west across river plains before rising to traverse through Porters Pass and Arthur's Pass National Park. Highlights include the impressive Waimakariri and Otira River gorges, driving along the Otira Viaduct and exploring natural wonders like the Castle Hill Rocks and Cave Stream Reserve.

Great Coast Road: The Great Coast Road stretches from Westport down to Kumara. It meanders alongside the ancient limestone cliffs of Paparoa National Park, where the world's smallest penguin resides, through Charleston and down to Punakaiki, home to the famous Pancake Rocks and Blow-holes. Driving it in one go only takes about 90 minutes, but it's best to slow down, enjoy the ride and explore some of New Zealand's small towns.

Glacier Highway: The Glacier Highway hugs the coastline

from Kumara, through Hokitika and all the way down to Glacier Country. This 300-kilometre journey is surrounded with dense coastal scrub and West Coast rainforest, making it one of New Zealand's most scenic routes. It passes through a national park, seal colonies, beaches, lakes, and as its namesake states, mighty glaciers.

Central Otago Touring Route: This 341-kilometre journey follows scenic highways from Ōtepoti Dunedin and the Pacific Ocean to the foot of the Southern Alps at Queenstown. It winds through the heart of Central Otago taking in characterful settlements such as Middlemarch, Ranfurly, Otarehua and Clyde, as well as the larger towns of Alexandra, Cromwell, Arrowtown and Queenstown. Take the road less travelled and enjoy the memorable local hospitality of Otago.

Southern Scenic Route: Starting in the historic city of Dunedin, this route follows the wild southern coast to Invercargill, then continues west and north to Te Anau, before ending at Queenstown. Highlights include wildlife encounters along The Catlins coast, the classic motors of Invercargill, cruising Fiordland, walking the Milford Track and the southern local delicacies found throughout.

Westport Wānaka Te Anau Queenstown Picton Nelson Aoraki/ Mt Cook Milford Sound Invercargill Haast Greymouth Franz Josef Dunedin Christchurch Blenheim Whangarei Wellington Whitianga Whanganui Thames Tauranga Taupō Rotorua Palmerston North New Plymouth Napier Kaitia Hamilton Gisborne Auckland

0 30 60 90 120 150 180 0 20 40 60 80 180 Kilometres Miles

DRIVE TIMES (hours) Whether you're planning your New Zealand holiday or simply looking for things to do during your visit - newzealand.com has you covered every step of the way. There, you'll find comprehensive information on everything New Zealand and you can book your flights, accommodation, transport and tours all in one go! You can also get up to the minute expert advice, traveller tips and exclusive stories about New Zealand daily by joining our social media communities. Find us on Facebook, Twitter or Instagram by searching 'purenewzealand' and start discovering.

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#NZMustDO 1 State Highway Main Road Railway Ferry Route isite and DOC Visitor Information Centres Walks Golf Course Museum Vineyard Fishing Game Fishing Skiing Europe 24 hours North Asia 11 hours South East Asia 10 hours North America 12 hours South America 12 hours Australia 6 hours 3 hours

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- Care for the land, sea and nature, treading lightly and leaving no trace.
- Travel safely, showing care and consideration for all.
- Respect culture, travelling with an open heart and mind

Protect nature Keep NZ clean Drive carefully Be prepared Show respect www.tiakinewzealand.com #TIAKIPROMISE Aotearoa New Zealand is home

to some of the most beautiful scenic drives, with many destinations being only hours away from one another. With an extensive network of air, train and road services most places can be reached by public transport. Buses and coaches link up with rail and ferry operators to take you the length of the country, and air travel is also available to most destinations. See the sights at your own pace and journey along New Zealand's themed highways that lead you to some of Aotearoa's most iconic landscapes and hidden gems. Most of these highways are signposted but detours are encouraged along the way and combining a few routes will ensure a varied experience. Getting Around Aotearoa New Zealand Touring Map isite is New Zealand's official visitor information network with over 60 locations nationwide. isite knows all the best things to do, places to stay and ways to get there. Plus they'll take care of the bookings. Every person who works at isite is a travel expert for their own home town, so they can help you to find the sorts of activities, attractions, accommodation and transport that only a local would know. You can be sure that once you have experienced the latest and greatest of what one place has to offer, isite will help connect you with their equally friendly isite colleagues at the next stop on your journey. So whether you've come around the world or down the road you can rely on isite for expert local knowledge and bookings throughout New Zealand. •

Itinerary planning and information • Bookings nationwide - accommodation, transport, activities, attractions • Free maps, weather & mountain safety information • Local information - events, attractions, restaurants & more! • Many isites offer free Wi-Fi – look for the logo on the map Most isites are open every day (except Christmas Day). Some isites operate reduced hours. Find an isite near you or get help over live-chat at www.isite.nz or call 0800 474 830. Hooker Valley Track, Aoraki Mount Cook National Park 2 Tourism and tourism infrastructure in New Zealand 2 Key messages ›

Tourism expenditure and arrivals have both shown massive growth in the March 2016 year. › Forecasts for the sector show impressive growth in tourism spend, dominated by an increase in Chinese tourists. Overall, the number of visitors is expected to increase to over 4,000,000 by 2022, assuming there is appropriate infrastructure to support this growth. › The quality of tourism infrastructure is important, especially in relation to visitor experience. › While New Zealand performs relatively well in air transport infrastructure, road and rail infrastructure is viewed as relatively poorer on average than in other developed countries. 2.1 New Zealand tourism – state of play and forecasts Tourism plays a significant role in the New Zealand economy in terms of generating export revenue and creating employment opportunities. Tourism expenditure includes spending by all travellers, whether they are international, resident householders, or business and government travellers. International tourism expenditure includes spending by foreign students studying in New Zealand for less than 12 months. Total tourism expenditure was \$29.8 billion for the year ended March 2015, an increase of 10.3 per cent from the previous year. International tourism expenditure increased 17.1 per cent (\$1.7 billion) to \$11.8 billion, and contributed 17.4 per cent to New Zealand's total exports of goods and services in the March 2015 year. Over the same period, domestic tourism expenditure increased 6.3 per cent (\$1.1 billion) to \$18.1 billion. Total annual overseas visitor arrivals passed 3 million for the first time in 2015 and have continued to increase, with arrivals reaching 3.3 million in the year ended March 2016. Higher arrivals from Australia, China and the United States drove total international arrival growth over the last year. Australian arrivals grew at 7 per cent and made up 42 per cent of all arrivals in the year ended March 2016, while Chinese arrivals grew at 28 per cent and made up 12 per cent of all arrivals. The growth is expected to continue, with arrivals forecast to reach 4.5 million by 2022 (from 3.1 million in 2015). The main contributors to this growth are expected to be China, Australia and the United States. MINISTRY OF BUSINESS, INNOVATION AND EMPLOYMENT AUGUST 2016 TOURISM INSIGHT SERIES TOURISM INFRASTRUCTURE 6 Figure 1:

International visitor arrivals, annual average, 2016–2022 forecasts Australia Canada China Germany India Indonesia Japan Korea UK US 0 500 1,000 1,500 2000 2005 2010 2015 2020 2022 Visitor arrivals (000s) Source: MBIE, Tourism Forecasts While Australia, China and United States are

projected to remain the three largest source markets, all markets are growing, including the United Kingdom, Japan, and newer developing markets in Asia and South America. These forecasts are purely demand-based. They assume there are no constraints in the supply of tourism infrastructure, such as air capacity, accommodation, or other factors. Therefore, inadequate investment in infrastructure will make a significant impact on realised demand growth. For 2015, the largest tourist destination for international visitors was Auckland (Figure 2). Approximately 1.5 million tourists visited Auckland during their stay in New Zealand. This is followed by Queenstown (820,000), Christchurch (770,000), Rotorua (690,000) and Wellington (610,000). Other significant international tourism centres include Dunedin, Taupo, Franz Josef Glacier, Wanaka and Te Anau. These numbers are based on overnight visits only.

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Figure 2: Locations visited by international tourists in 2015

Location	No of People (million)
Auckland	1.5
Queenstown	0.82
Christchurch	0.77
Rotorua	0.69
Wellington	0.61
Dunedin	0.0
Taupo	0.0
Franz Josef	0.0
Wanaka	0.0
Te Anau	0.0

Source: MBIE, International Visitor Survey

A total of 551,000 delegates attended 5,500 conferences/conventions in the year ended December 2015. This indicates more delegates attended a greater number of events compared to the year ended December 2014, where 500,000 delegates attended 5,200 conferences. The number of delegate days for conferences and conventions was unchanged between the two years, at around 1.1 million days. Visitors cite many reasons to come to New Zealand.

- › The country is highly geographically diverse and contains a range of different scenery, including subtropical forests, beaches, glaciers, mountains and plains in a relatively small area.
- › New Zealand also has a reputation for outdoor adventures, including surfing, skiing, kayaking, tramping and sailing, among others.
- › The country has several endemic animal and plant species, such as the iconic kiwi, tuatara and ferns.
- › Travelling is seen to be relatively easy, with self-driving popular. The distances between towns and attractions are relatively short.
- › New Zealand is famous for its high quality wines, with Marlborough and the Hawke's Bay being the key grape-growing regions.

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- › Māori culture is often a drawcard for tourists, with Māori-centred attractions throughout the country, especially in Auckland, Rotorua and many other tourist centres.
- › The population is relatively sparse. New Zealand has a land area the size of Great Britain but only 4.5 million inhabitants, so New Zealand feels less crowded than other countries.
- › New Zealand has a temperate climate, without extremes of hot or cold.
- › Visitors also view the country as being relatively safe, even for solo travellers.

2.2 Role of infrastructure in tourism destination competitiveness and visitor attraction

There are a variety of factors that determine why a particular location is attractive to tourists. One recent study² listed these as:

- › heritage and culture
- › social competitiveness (labour market factors, and staff training, TV stations, newspapers)
- › education (qualifications achieved)
- › communication facilities (ICT readiness)
- › tourism price competitiveness
- › environmental and sustainability record
- › infrastructure
- › openness (visas, trade).

2.2.1 Significance of infrastructure

The quality of a destination's infrastructure is a key part of its tourism offering – particularly in relation to the visitor experience at the destination. The availability and quality of hotel rooms and other accommodation is likely to be fundamental to a visitor's choice of the timing and the length of a visit to the destination. Road infrastructure enhances accessibility to different parts of the destination country, while sound airport infrastructure ensures that tourists experience a comfortable transition from the plane to destination. Good communication infrastructure allows quick and cheap communication between the origin and destination country and during the traveller's visit to the destination. Providing high-standard, online access to essential information about the destination, and for booking accommodation and tourism services (eg, theatre tickets), before embarking on travel reduces the traveller's feelings of uncertainty, fear and asymmetric information. Knowing that other infrastructure, such as wastewater and energy, is reliable also mitigates traveller concerns and

enhances the attractiveness of the visit. That said, while good infrastructure is an important factor in destination attractiveness, it is likely to be less of a drawcard than other factors, like the uniqueness of local heritage and culture. In early models of destination attractiveness, infrastructure was described as an important supporting factor for the real drivers of destination competitiveness – namely, core resources and attractors, destination management, destination policy planning and development, and 2 Mazanec, J. A., Wöber, K., & Zins, A. H. (2007). Tourism destination competitiveness: From definition to explanation? *Journal of Travel Research*, 46(1), 86–95. MINISTRY OF BUSINESS, INNOVATION AND EMPLOYMENT AUGUST 2016 TOURISM INSIGHT SERIES TOURISM INFRASTRUCTURE 9 amplifying determinants (eg, locations, security, market awareness).³ In other models, infrastructure has been characterised also as a critical part of the services that add up to the tourist destination experience.⁴ Researchers and planners⁵ studying tourism on the island of Mauritius in the Indian Ocean have undertaken a comprehensive and systematic measurement of the influence of infrastructure on tourism development. Their conclusions include: The growth in tourism infrastructure (rooms and capital works) on Mauritius has contributed positively to the number of visitor arrivals (along with, but distinguishable from, relative prices, distance, and average incomes in the origin country).⁶ The transport capital stock of Mauritius contributed positively to the number of tourist arrivals between 1971 and 2000. It was perhaps not as important as a contributor to tourism development as the growth in the number of rooms available for tourists to rent, but it was more significant than the amount of capital investment in communications, energy, wastewater and defence during the same period.⁷

2.2.2 New Zealand's tourism infrastructure

Within the World Economic Forum's most recent Travel and Tourism Competitiveness Report 2015, 8 infrastructure components account for 18 of the 90 competitiveness measures used to rank 141 countries on their competitiveness as tourist destinations. In that report, New Zealand is ranked as the 16th most competitive destination in the world. However, it comes 21st on infrastructure (largely due to its 49th ranking for ground and port infrastructure, which includes measures of road and rail density and quality, on which it scores poorly). The quality of New Zealand's tourism infrastructure was an issue in Tourism Industry Aotearoa's Tourism 2025, 9 which acknowledges that, while New Zealand's natural environment provides the setting for a range of visitor experiences, quality infrastructure is needed to support the range of activities that visitors enjoy. Tourism 2025 argues that: › Public investment in tourism infrastructure will encourage private sector investment. Government support for convention centres and upgraded port and airport facilities will lead to private sector investment in complementary assets like hotels, restaurants, activities and attractions. Therefore, it recommends: 3 Crouch, G. I. & Ritchie, J. R. B. (1999). Tourism, competitiveness and societal prosperity. *Journal of Business Research*, 44(3), 137–152. 4 Ritchie, J. R. B. & Crouch, G. I.. (2003). The competitive destination: A sustainable tourism perspective. Wallingford, UK: CABI. 5 For example, Khadaroo, J. & Boopen, S. (2008). The role of transport infrastructure in international tourism development: A gravity model approach. *Tourism Management*, 29(5), 831–840; Khadaroo, J. & Boopen, S. (2007). Transport infrastructure and tourism development. *Annals of Tourism Research*, 34(4), 1021–1032. 6 Seetanah, B., Juwaheer, T. D., Lamport, M. J., Rojid, S., Sannasse, R. V., & Subadar, A. U. (2011). Does infrastructure matter in tourism development? *University of Mauritius Research Journal*, 17, 105. 7 Boopen, S. (2006). Transport capital as a determinant of tourism development: A time series approach. *Tourismos: An International Multidisciplinary Journal of Tourism*, 1(1), 55–73. Retrieved from <http://mpira.ub.uni-muenchen.de/25402/> 8 World Economic Forum. (2015). The travel and tourism competitiveness report 2015: Growth through shocks. Retrieved from http://www3.weforum.org/docs/TT15/WEF_Global_Travel&Tourism_Report_2015.pdf 9 Tourism Industry Association of New Zealand. (n.d.). Tourism 2025. Retrieved from <http://tourism2025.org.nz/> MINISTRY OF BUSINESS, INNOVATION AND EMPLOYMENT AUGUST 2016

TOURISM INSIGHT SERIES TOURISM INFRASTRUCTURE 10 – continued government support for the International Convention Centre in Auckland and encouragement of a regional network of centres to further boost the important convention and incentive market – upgrading port infrastructure to handle the requirements of larger cruise ships visiting New Zealand more often – securing continued commitment from central and local government agencies for tourism to be prioritised as a critical contributor to Christchurch’s economic recovery. › Better Wi-Fi connectivity and broadband services will improve the visitor experience and raise New Zealand business capability, ensuring the tourism industry is internationally competitive. According to analysis by Tourism New Zealand¹⁰ on the International Visitor Survey microdata, the lack of free Wi-Fi is the main reason people rate accommodation poorly. Tourism 2025 recommends that New Zealand extend access to low cost Wi-Fi and broadband. › Local infrastructure that supports visitor activities also supports the people who live in the communities they visit. Roads that are safe and enjoyable and offer places to stop along the way enhance the holiday experience. Good signage, public toilets and dump stations, recycling and other local amenities are also integral to creating an outstanding visitor experience. Therefore Tourism 2025 recommends: – through New Zealand Trade and Enterprise, promoting and encouraging international investment in tourism assets – supporting local infrastructure development, especially in popular visitor destinations – continuing the focus on improving visitor facilitation, including translation of public agency ‘visitor facing’ information – continuing investing in aviation infrastructure and technology, including Airways New Zealand’s navigation technology upgrades.

2.3 Tourism and population Some regions are more affected by tourism than others. The ratio of visitor nights to population is a useful indicator of how tourism may affect the local infrastructure (Figure 3). A high ratio indicates that the relative number of tourists in relation to local residents is high, which means that the population in the region swells considerably during the high tourist season and there is an increased pressure on local infrastructure over that period. Among regions, the West Coast has the highest ratio, followed by Otago, Nelson, and Marlborough.

10 Tourism New Zealand. (2015). Visitor experience. Retrieved from <http://www.tourismnewzealand.com/markets-stats/research/infographics/visitor-experience/>

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Figure 3: Ratio of annual visitor nights to population and visitor count to population, year ended December 2015

Region	Ratio of annual visitor nights to population, 2015	Ratio of annual visitor count to population, 2015
Manawatu-Wanganui	0	5
Taranaki	10	10
Gisborne	15	15
Hawke's Bay	20	20
Waikato	25	25
Auckland	30	30
Canterbury	35	35
Wellington	40	40
Northland	45	45
Southland	50	50
Tasman	55	55
Bay of Plenty	60	60
Marlborough	65	65
Nelson	70	70
Otago	75	75
West Coast	80	80

Source: MBIE, International Visitor Survey

2.4 State of the Industry Survey 2015 In a survey of 269 tourism industry businesses in 2015 by Tourism Industry Aotearoa, 37 per cent of respondents stated that (lack of) investment in infrastructure was a challenge for their business (3rd most popular response), and 21 per cent stated that it was the most significant challenge for their business (4th most popular response).¹¹ Conversely, 55 per cent of respondents stated that increased air capacity was an opportunity for their business (12 per cent considered it as their most significant opportunity), and 41 per cent stated that infrastructure improvements were an opportunity for their business (5 per cent considered it as their most significant opportunity).

11 Tourism Industry Association New Zealand & Lincoln University. (2015). State of the tourism industry 2015. Retrieved from <http://tourism2025.org.nz/assets/Uploads/SOI-2015-Final.pdf>

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The most significant challenge for tourism businesses in the survey was seasonality issues, which almost half of respondents stated as their most important challenge. In open survey answers the reason for the response was elaborated on with respondents describing issues such as accommodation capacity, overcrowding at tourist sites, and the result these have on tourist satisfaction. In summary, the survey highlighted the importance of tourism

infrastructure and its impact on businesses within the industry. MINISTRY OF BUSINESS, INNOVATION AND EMPLOYMENT AUGUST 2016 TOURISM INSIGHT SERIES TOURISM INFRASTRUCTURE 13 NZ advantage score 12.3 Global growth rate 3.88% Shaping our slice of heaven 2017 | Tourism: 100% Pure New Zealand 14 Tourism: 100% Pure New Zealand The future of New Zealand's tourism industry looks bright Brand New Zealand plays off its stunning alpine scenery, sheer physical beauty, vibrant Polynesian culture, extreme sport, quality and freshness of cuisine, and its personable and relaxed residents to attract visitors from all over the world.¹³ Tourism is a major contributor to New Zealand's economic prosperity. It is the nation's largest export industry and has been responsible for one fifth of growth in New Zealand's GDP since 2011.¹⁴ Over the last two years alone, the size of the sector has grown 24 percent.¹⁵ Growth of this magnitude brings with it substantial economic opportunity. Tourism is projected to be among the world's fastest growing industries, meaning there is more potential growth in the pipeline for New Zealand. As illustrated in Figure 6 and Figure 7, according to MBIE, tourist numbers in New Zealand are forecast to reach 4.9 million in 2023, up 39% from 2016 – a growth rate of 4.8% per year. This would inject \$15.3 billion into the economy in 2023, up 52% from 2016. China is expected to overtake Australia as our largest market by spend, however Australia should remain the largest source of visitor arrival numbers.¹⁶ The percentage of total visitor arrivals in New Zealand coming from Australia is forecast to decrease from 41% in 2016 to 36% by 2023, while visitors coming from China are forecast to increase from 12% in 2016 to 19% by 2023. Figure 6: Share of visitor arrivals by international source market (2016) Figure 7: Projected share of visitor arrivals by international source market (2023) 2023 Total visitor arrivals 4.9 million 2016 Total visitor arrivals 3.5 million Germany US 8% US 9% UK 6% UK 5% SGP 2% SGP 2% OTHER 17% OTHER 20% KOR 2% JPN 3% JPN 3% IDN 1% IND 1% GER 3% GER 3% CHN 12% CAN 2% CAN 1% CHN 19% AUS 40% AUS 36% IDN 1% IND 2% KOR 2% Source: MBIE International tourism forecasts 2017 to 2023 Australia China India Indonesia Japan Korea Other Singapore UK Canada US Shaping our slice of heaven 2017 | Tourism: 100% Pure New Zealand 15 This growth can also present challenges. It can stretch capacity and the ability to consistently offer a high quality tourism experience that delivers on New Zealand's brand promise. These pressures can be particularly acute when it comes to tourism infrastructure, so the adequacy and appropriateness of investment is critical to the industry's continued growth. Opportunities to take full advantage of future growth in tourism Opportunities to take full advantage of future growth in tourism include the sharing economy, increasing demand for tourism out of Asia, unique visitor experiences and more affordable, direct flights to and from New Zealand. Understand how the sharing economy is likely to change tourism Technologies and business models referred to collectively as the sharing economy are changing the tourism landscape by giving people new options for where to stay, what to do and how to get around. Leading examples include Uber and Airbnb. New Zealand needs to continue to adapt and embrace the changes resulting from the sharing economy to effectively influence the choices available to tourists. Increasing tourism from Asia New Zealand is well positioned to capitalise on the burgeoning Asian middle class and its growing demand for international travel. With Chinese tourists forecast to overtake Australians in terms of tourist spend, our strengthening relationship with Asia will be at the forefront of tourism growth in New Zealand. While only 4% of China's population held passports in 2015, this percentage will reach 12% by 2025, increasing opportunities for New Zealand to attract Chinese tourists.¹⁷ New Zealand offers a unique visitor experience New Zealand has a varied natural environment, including mountains, lakes, beaches, forests and farmlands. Whether it is visiting Milford Sound, the Tongariro Alpine Crossing, Waitomo Caves, Fox Glacier or many other Kiwi tourist attractions, New Zealand continues to attract visitors from all over the world. In addition, New Zealand has a reputation as a safe destination, largely free of any strife that marks many other tourist destinations around the world. Cheaper and more direct flights to New Zealand Increased air access, greater levels of competition and low-cost carriers

offering more flights into New Zealand have created many more affordable options for tourists and business travellers. The overall direct flight capacity to New Zealand increased by 15% in 2015, and a further 8% in 2016.¹⁸ More direct and affordable flights improve tourist access to New Zealand, which will contribute to New Zealand's growing industry. New Zealand needs to continue to adapt and embrace the changes resulting from the sharing economy to effectively influence the choices available to tourists tourism 24 in the last two years % growth in Shaping our slice of heaven 2017 | Tourism: 100% Pure New Zealand 16 The challenges for the tourism industry Renew infrastructure To capture the maximum benefit from sustainable tourism growth, while maintaining community support, all aspects of the industry and the infrastructure that supports it need to scale up accordingly. Businesses need to invest in new capacity, products and services, just as the providers of infrastructure need to increase the capacity and quality of their offerings.¹⁹ Visitor accommodation is the most needed type of tourism infrastructure in New Zealand with the highest potential impact for the sector. Additional supply of visitor accommodation can relieve constraints and facilitate additional visitation. While developers are likely to increase accommodation supply in metropolitan areas to capture the surplus demand without government intervention, more coordination is required for regional areas. The most acute gaps are in Auckland, Queenstown-Wanaka, Wellington, Canterbury and Dunedin.²⁰ Airports and related facilities are required for a successful tourism industry. The regions where infrastructure gaps are most acute are Gisborne, Wellington, West Coast and Northland. Auckland is the entry point for the vast majority of visitors, and this may create a bottleneck. More international visibility To ensure differentiation from other tourism destinations, New Zealand must increase its visibility beyond the traditional clean green image. New Zealand can increase global awareness to include its culture, adventure tourism offerings, cuisine, political stability and safety. Positioning for prosperity To make the most of this current and potential opportunity, New Zealand needs to maintain the attractiveness of its unique tourism offerings and understand the impact of the sharing economy. In light of the likely challenges to renewing the infrastructure that supports tourism, there are important questions to address. 1. How can we ensure investment is aligned with what tourists want – especially those from Asia's growing middle class? 2. How can we ensure we invest in infrastructure that supports tourism in the most effective and efficient way? 3. How can we increase visibility of New Zealand's attractive tourist brand worldwide? 1 © 2 Following are findings from questions included in Views on Tourism research conducted during October 2022 to September 2023¹. Tourism New Zealand is Angus & Associates' country-level partner for the research programme in New Zealand. The Views on Tourism questions are designed to measure resident opinion on the value of international and domestic tourism and the extent to which tourism is having both positive and adverse impacts. The research considers New Zealand residents' views on tourism and its impacts on their region, and contrasts this with the sentiment expressed by residents of other destinations (currently Australia and Ireland) for context. 1 Tourism New Zealand uses Angus & Associates' Views on Tourism© research methodology 3 The research is undertaken with a representative (by age, gender and region) sample of at least n=250 New Zealand residents each month. The sample is collected continuously through the year and accumulates to at least n=3,000 on an annual basis. The sample is drawn from a leading online research panel and all respondents are aged 18 years or more. For key measures, results for Australia and Ireland are included in the report to provide more context for the New Zealand results and to serve as points of comparison. The same Views on Tourism© core question set, and similar methodologies are used in those destinations. Other destinations may join this benchmarking group over time. • Each TAR is an index 'score' calculated from responses to a set of statements about the benefits of tourism activity and its impacts. • The calculation gives equal weight to responses in relation to each statement. • Separate TAR scores are calculated for international and domestic tourism (i.e. there are two scores – one for inbound tourism, and one for domestic tourism). •

International and domestic TAR scores are calculated using the same methodology (i.e. they are comparable in this sense). • The TAR is plotted on a six-section scale (Advocacy, Approval, Acceptance, Limited Acceptance, Threatened Acceptance and Disapproval) to highlight residents' overall perceptions of domestic and international tourism for a destination on an ongoing basis. 1 Tourism New Zealand uses Angus & Associates' Views on Tourism© research methodology 4 New Zealand residents view domestic tourism more favourably than international tourism. New Zealand's domestic TAR score of 63 (approval) is 12 points higher than its international TAR score of 51 (acceptance), however the international TAR score has improved in both of the past two years. 80% of New Zealand residents personally benefited from tourism activity in their local area in the year ending September 2023, a higher proportion compared with the same period last year (76%). More than one third (38%) see that tourism activity means more local businesses are open or able to stay open, and a similar proportion (37%) benefit from tourism activity providing opportunities for employment/income (for them or their family). In the past year, 65% of New Zealand residents have been negatively impacted by tourism activity in their local area in some way. Three in ten (30%) have experienced more litter and waste generation and almost one quarter (24%) experience greater difficulty finding a car park or believe that it takes longer to get to places due to traffic/congestion caused by local tourism activity (23%). Asked whether enough action is being taken to address the negative impacts of tourism, an average 71% agree that there is. Key actions that New Zealand residents believe will help mitigate the negative impacts of tourism include greater improvement of community infrastructure, managing/lowering living costs, improving safety, and taking better care of the environment. 5 Looking to the future, 30% of New Zealand residents would like the local tourism industry to focus most on improving community infrastructure. Others commonly believe key areas of focus should be creating employment for people in the community, attracting more of both international and domestic visitors, and encouraging visitors to travel outside of the peak season. Two thirds of New Zealand residents (66%) have engaged with tourism/visitors in some way during the past two years. Almost three in ten (29%) have hosted visitors in their home. Other common activities included recommending a local or domestic tourism activity or attraction to someone they know, and interacting with someone they don't know who was visiting their region. 6 Views on Tourism Snapshot: New Zealand Residents Research was conducted between October 2022 and September 2023 using Angus & Associates' Views on Tourism© programme. The sample includes n=3,234 New Zealand residents aged 18+ years. TOURISM APPROVAL RATING (TAR) TAR score highlights residents' overall perceptions of tourism International TAR: Domestic TAR: 80% of New Zealand residents have experienced benefits from tourism activity in their area, and the top 5 are... More local businesses opening, or being able to stay open Opportunities for employment & income Inspired them to travel domestically A greater variety of goods and services is available than otherwise would be Greater appreciation of the natural environment 65% of New Zealand residents have experienced adverse impacts from tourism activity in their area, and the top 5 are... More litter and waste generation Greater difficulty finding a car park Takes longer to get to places due to traffic and congestion Damage to the natural environment Higher day to day living costs New Zealand 51 Australia 50 Ireland 65 Residents' most commonly want their local tourism industry to focus in the future on... Improving community infrastructure Creating employment for people in the community Attracting more domestic visitors Encouraging visitors to travel outside the peak season Attracting more international visitors Advocacy Approval Acceptance Limited Acceptance Threatened Acceptance Disapproval New Zealand 63 Australia 58 Ireland 68 7 8 2% 4% 42% 48% 92% 86% 32% 26% (5%) (8%) (8%) (7%) (6%) (7%) (4%) (3%) Disagree* Agree* Nine in ten New Zealand residents (92%) agree that international tourism is good for New Zealand; however, a slightly smaller proportion (86%) agree that international tourism is good for their region. Despite the benefits of international tourism being widely acknowledged by New Zealand residents, almost one third (32%)

believe that international visitors put too much pressure on New Zealand, and one fourth (26%) believe that international visitors put too much pressure on their region. While still significant, these proportions are lower than they were in the previous year. The international TAR score, which considers the positive and negative impacts of international tourism is at the level of 'acceptance' for New Zealand residents (at 51). By age, younger New Zealand residents view international tourism less favourably than older age groups. The international TAR score is also lower than it is for the total sample among Māori (at 41) and Chinese New Zealanders (at 38), as well as among those who live in rural areas (at 47) and those who have not travelled in the past 12 months (at 45). Base: Total sample - New Zealand residents n=3,234 Arrows (/) indicate statistically significant differences vs YE Sep 2022 at 95% confidence level *Agree = Strongly agree + Agree + Somewhat agree; Disagree = Strongly disagree + Disagree + Somewhat disagree; 'Neither agree nor disagree' and 'Don't know' responses excluded 51 40 46 54 62 INTERNATIONAL TAR SCORE, BY AGE Total sample 18-29 years 30-44 years 45-59 years 60+ years 9 Advocacy Approval Acceptance Limited Acceptance Threatened Acceptance Disapproval Excluded (small sample size)