

Outbound Market Share Analysis

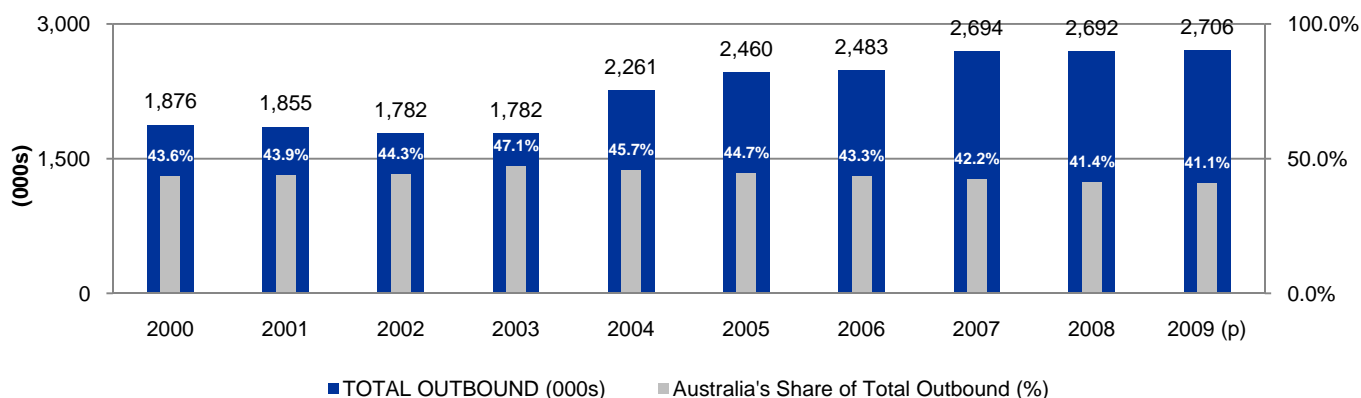
New Zealand

Australia's Market Share of New Zealand's Total Outbound

- Outbound travel from New Zealand has increased from 1.9 million in 2000, to 2.7 million in 2009 (preliminary data updated on March 16, 2010).
- Australia's share of New Zealand's total outbound market has decreased from 44% in 2000, to 41% in 2009.

Total Outbound & Australia's Market Share

Source: Tourism Economics (Tourism Decision Metrics)

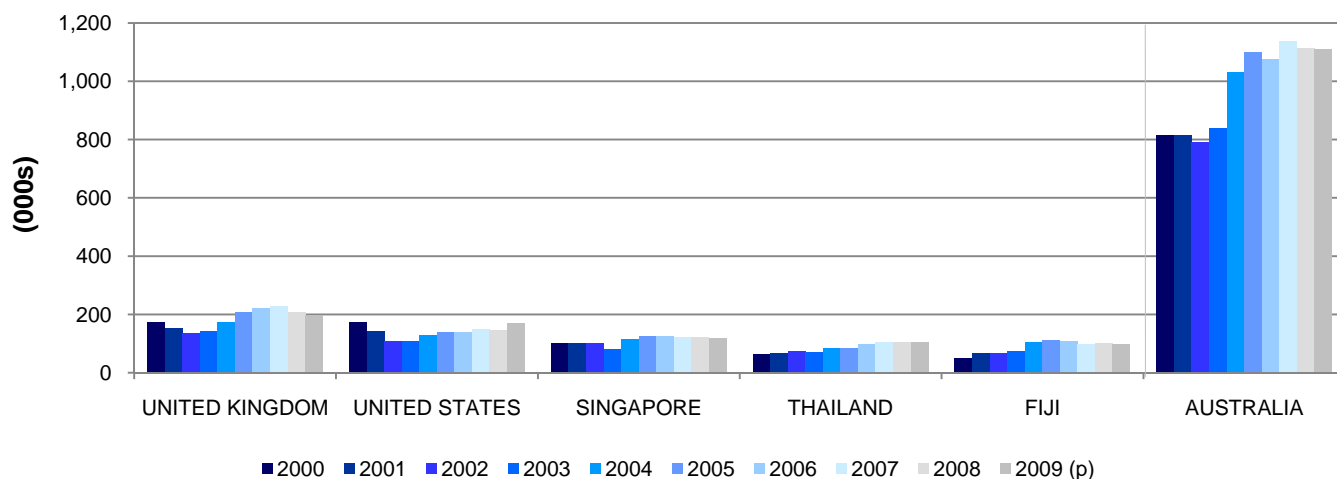


Top Five Outbound Destinations

- In 2009, New Zealand's top five outbound destinations were Australia, the UK, the US, Singapore and Thailand.
- Australia ranked 1st among all outbound destinations.

New Zealand's Top Outbound Destinations (Total Outbound)

Source: Tourism Economics (Tourism Decision Metrics)



Outbound Market Share Analysis

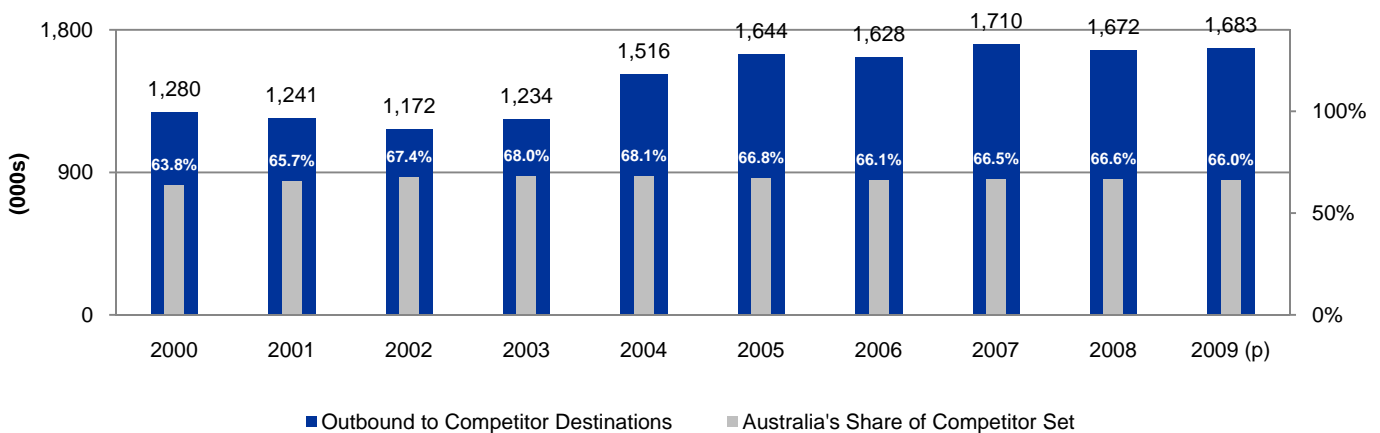
New Zealand

Market Share of Tourism Australia's Competitor Set

- Travel to competitor destinations increased from 1.3 million in 2000, to 1.7 million in 2009 (preliminary data updated on March 16, 2010).
- Australia's share of competitor outbound has increased from 64% in 2000, to 66% in 2009.

Outbound to Competitor Set & Australia's Share

Source: Tourism Economics (Tourism Decision Metrics)



Top Five Competitor Destinations

- Tourism Australia's current competitor set is defined as the UK, the US, the South Pacific (Oceania excluding Australia), Canada and South Africa.
- Australia received 1.1 million New Zealanders in 2009.

Outbound to TA Defined Competitor Destinations

Source: Tourism Economics (Tourism Decision Metrics)

