



**VISITOR
SOLUTIONS**



**TRACTION
—ROOM—**

**SOUTHERN RAIL TOURISM
PASSENGER SERVICES
PHASE ONE: PRELIMINARY OPTIONS
ANALYSIS FINDINGS AND NOTES**

**CONFIDENTIAL
NOVEMBER 2018**

PREPARED FOR THE CANTERBURY MAYORAL FORUM

CONTENTS.

1.0	Summary Overview	4
	Appendix 1: Technical Rail Data Notes	8
	Appendix 2: Confidential Partner Questions	15
	Appendix 3: Extended Visit Itinary Option Notes	17
	Appendix 4: Extended Visitor Offer	21
	Appendix 5: Market Growth Indicators	24

Disclaimer:

Information, data and general assumptions used in the compilation of this report have been obtained from sources believed to be reliable. Visitor Solutions Ltd has used this information in good faith and makes no warranties or representations, express or implied, concerning the accuracy or completeness of this information. Visitor Solutions Ltd is acting as an independent consultant. In doing so, the recommendations provided do not necessarily reflect the intentions of the Client. Interested parties should perform their own investigations, analysis and projections on all issues prior to acting in any way with regard to this project.

© Visitor Solutions 2018.





IMAGE BY BERND HILDEBRANDT

1. SUMMARY OVERVIEW.

PROJECT BRIEF AND METHODOLOGY

As part of the Canterbury Economic Development Strategy (CREDS) programme, the Canterbury Mayoral Forum has requested a review of the potential for periodic rail passenger charter services, or a regular service offering on the Main South Line [MSL] between Christchurch and Invercargill. KiwiRail has indicated that they have no intention of running this service unless there is evidence to support a commercial proposition. The purpose of this project is to complete an indicative business justification case to determine whether there is potential and what the opportunity could be. The project was staged in two phases, the first of which is now complete. The methodology used to undertake the first phase of the project included a review of all available secondary data, site visits, interviews and analysis.

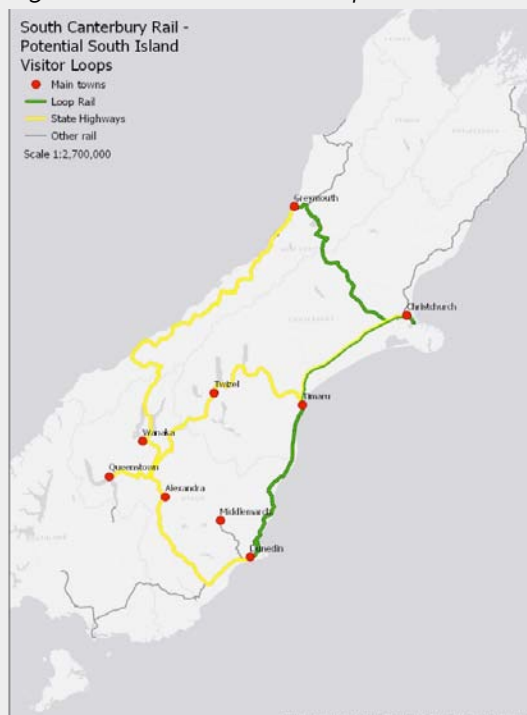
Initial research led to the project brief being refined to focus on catering for tourism services between Christchurch and Dunedin. Regular public passenger services were excluded on the grounds of competitiveness against other transport modes, while the Dunedin to Invercargill route was less desirable for technical and consumer demand reasons¹.

THE OPPORTUNITY CONCEPTUALISED

Initially the Christchurch to Dunedin rail route was considered in isolation. However, it became apparent that this was limiting the potential role of the opportunity. The route was instead conceived as a series of opportunities (or circuits / loops) each with the core Christchurch to Dunedin rail leg (which remains the study focus) (Figure 1). These circuits are:

1. Christchurch to Dunedin via rail (return via rail, road or air)
2. Christchurch to Dunedin via rail. Dunedin, Alexandra, Twizel, Timaru to Christchurch by road.
3. Christchurch to Dunedin via rail. Dunedin, Alexandra, Wanaka and Greymouth via road. Greymouth to Christchurch by rail.

Figure 1: Potential Visitor Loops



Importantly the visitor can also access these circuits as short legs and stay in any number of large and small visitor hubs along the way. For example, arriving in Queenstown via air and traveling to Dunedin via road, Dunedin to Christchurch via rail and exiting via Christchurch airport.

The main objective here is to build viable itineraries and potential partnerships with established tourism operators that in turn help funnel visitors onto the core Christchurch to Dunedin rail leg (and into South Canterbury).

1. A Dunedin to Invercargill route could be explored at a later stage if required.

THE POTENTIAL MARKET

Available evidence indicates that the appetite for rail journeys is continuing to grow in New Zealand and the South Island.

“Overall, TranzAlpine passenger business has grown by 90% over the past five years, while the Northern Explorer is up 71%.” (KiwiRail’s GGM Sales and Commercial, Alan Piper)

This growth is also evidenced by increased patronage on Dunedin Rail’s tourist services. Wider visitor market growth into New Zealand and the South Island is also well reported. This is evidenced by flight growth into the main international airport hubs and higher port visitation, via the burgeoning cruise ship industry which has seen record growth².

PASSENGER ROLLINGSTOCK

The key obstacle facing the potential South Canterbury Rail service is the present lack of suitable passenger rollingstock for medium distance tourist operations. At a minimum, it is expected tourists would at the very least expect a standard provided by KiwiRail’s Scenic trains or the Silver Fern Railcars.

The review looked at a range of options, including: KiwiRail Scenic carriages, KiwiRail Charter carriages, Heritage carriages, Auckland Transport carriages (pre-electrification) and Silver Fern railcars.

Short of purchasing and re-furbishing surplus Auckland Transport rolling stock [if enough are available], using carriage rolling stock is the least recommended option. Silver Fern railcars are considered more suitable given their configuration and existing presence in the South Island.

There are two railcars in service, RM24 owned by KiwiRail and leased to Dunedin Railways and RM30 operated by KiwiRail for charter trains. A third railcar, RM18, is stored at the Otahuhu Workshop site but is non-operational. At present RM24 is the most suitable given it is fitted with a fire suppression system, a requirement for operation through the Mihiwaka tunnel north of Dunedin. However, RM18 must be considered as a second option.

STATIONS

The review looked at station facilities at Christchurch, Ashburton, Timaru, Oamaru and Dunedin. Both Christchurch and Dunedin stations are fully operational passenger terminals. Christchurch is operated by KiwiRail and Dunedin by Dunedin Railways. The operator would need to reach agreement with these organisations regarding management of passenger train operations through stations outside of their direct ownership or control. This would include facilities to stable the railcar overnight.

Ashburton station has been demolished and the remaining platform is considered unsuitable for the proposed service offering. Timaru has potential to meet operational needs dependent on the requirements of existing users and the scope of the passenger operation itself. Oamaru also presents several options including the station on the KiwiRail system or using one of two stations on the connected Oamaru Steam and Rail Society system.

OPERATING CONSIDERATIONS

The estimated running times for the Silver Fern Railcar are outlined in Table 1. Assuming two 90-minute stops at Timaru and Oamaru for off-train activity, a Christchurch – Dunedin railcar journey would take an estimated 8 hours 20 minutes. We believe this is a very marketable full day travel excursion. Initial analysis indicates that available platform space at Christchurch and Dunedin is also achievable at the times that would be required.

2. These data represent a general indication of the wider sector rather than detailed analysis of the South Canterbury rail offering. Focused market analysis will be required in later project stages.

3. Silver Fern Railcar have capacity for 96 passengers; a small galley for basic food and beverage preparation and delivery; limited luggage space capable of holding up to 90 medium size bags.

Table 1: Estimated Silver Fern Railcar running times are.

Christchurch to:	
Timaru	2 hours 10 min
Oamaru	3 hours 20 min
Dunedin	5 hours 20 min

Adopting a partnership approach with an existing rail operator has been identified as offering significant operational benefits in the areas of train crew and rail licensing. Preliminary discussions with one potential partner, Dunedin Rail have been very positive. They are supportive of the general approach and can see the benefits of exploring partnership opportunities further. The analysis concluded that even if KiwiRail was supportive Dunedin Rail would likely be required as a partner.

PRELIMINARY CONCLUSIONS

Based on available data the preliminary conclusions of the first stage of the project are:

1. The concept of a South Canterbury tourist rail experience looks promising from a technical, operational and market demand perspective.
2. Dunedin Rail is a natural partner that brings significant benefits to the testing and potential implementation of the concept. Dunedin Rail is likely to be central to the concept's feasibility.
3. Timaru and Oamaru would be the two main rail stops on route between Christchurch and Dunedin.
4. The 'loop' approach to the concept potentially brings many other industry players into consideration (which could assist higher visitation on the Christchurch to Dunedin rail leg).
5. Implementation is likely to be dependent on the use of a Silver Fern Railcar, either RM30 or RM18 (both owned by KiwiRail). RM18 would need to be made operational.
6. Critically KiwiRail can facilitate or terminate the concept given its central role in any development.

RECOMMENDATIONS

It is recommended that:

1. Phase two of the study (preliminary business model and partnership discussions) be advanced. Key deliverables would include things such as:
 - Expanded discussions with potential partners such as Dunedin Rail,
 - A preliminary business plan with key assumptions,
 - An implementation plan,
 - A risk and mitigation assessment.
 - A combined report (merging phases one and two together)
2. Once completed the study should be presented to the potential partners and then depending on the outcome to KiwiRail for consideration.
3. Should the concept be advanced to the next stage a full market analysis and business case should be completed.



IMAGE BY RHONDA ALBOM

APPENDIX 1: TECHNICAL RAIL DATA NOTES.

1. SCOPE

- 1.1 The Canterbury Mayoral Forum requested a review of the potential for periodic rail passenger charter services, or a regular service offering on the Main South Line [MSL] between Christchurch and Invercargill. The project was staged in two phases the first of which is now complete. The methodology used to undertake the first phase of the project included a review of all available secondary data, site visits, interviews and analysis.
- 1.2 Initial research led to the project brief being refined to focus on catering for tourism services between Christchurch and Dunedin. Regular public passenger services were excluded on the grounds of competitiveness against other transport modes, while the Dunedin to Invercargill route was less desirable for technical and consumer demand reasons.

2. PASSENGER ROLLINGSTOCK

- 2.1 The key obstacle facing Southern Rail is the present lack of suitable passenger rollingstock for medium distance tourist operations. At a minimum, it is expected tourists would at the very least expect a standard provided by KiwiRail's Scenic trains or the Silver Fern Railcars.
- 2.2 The review looked at a range of options, including:
- KiwiRail Scenic carriages.
 - KiwiRail Charter carriages.
 - Heritage carriages.
 - Auckland Transport carriages (pre electrification)
 - Silver Fern railcars.
- APPENDIX A (11) includes a detailed analysis of each of these options.
- 2.3 Short of purchasing and re-furbishing surplus Auckland Transport rolling stock [if sufficient are available], using carriage rolling stock is the least recommended option.
- 2.4 Silver Fern railcars are considered more suitable given their configuration and existing presence in the South Island.
- 2.5 They have capacity for 96 passengers; a small galley for basic food/beverage preparation and delivery; limited luggage space capable of holding up to 90 medium size bags.
- 2.6 There are two railcars in service, **RM24** owned by KiwiRail and leased to Dunedin Railways, and **RM30** operated by KiwiRail for charter trains.

- 2.7 A third railcar, **RM18**, is stored at the Otahuhu Workshop site, but is currently non-operational.
- 2.8 At present **RM24** is the most suitable given it is fitted with a fire suppression system, a requirement for operation through the Mihiwaka tunnel north of Dunedin.



Silver Fern Railcar

3. RUNNING RIGHTS:

- 3.1 Both locomotive hauled passenger trains and Silver Fern railcars have existing running rights to operate between Christchurch and Invercargill.

4. LINE SPEED:

- 4.1 Apart from relatively short sections of restricted track, current maximum speeds for passenger trains are:

Between	Silver Fern Railcar	Passenger Train (1)	Passenger Train (2)
Christchurch - Oamaru	100km/h	100km/h	90km/h
Oamaru - Palmerston	80km/h	80km/h	80km/h
Palmerston - Merton	70km/h	70km/h	70km/h
Merton - Sawyers Bay#	50km/h	50km/h	50km/h
Sawyers Bay - Invercargill	80km/h	80km/h	80km/h

- (1) Locomotive hauled carriages authorised to run at 100km/h
 (2) Locomotive hauled carriages restricted to maximum 90km/h
 # includes a section of 70km/h for all passenger trains

5. OPERATING SYSTEMS

- 5.1 The section of track between Christchurch and Oamaru is controlled by a centralised traffic control system (CTC). The signals / points are controlled directly by train controllers based in KiwiRail National Train Control Centre.
- 5.2 The section of track between Oamaru and Invercargill, apart from a relatively short section of CTC near Dunedin, is controlled by a track warrant system (TWC). This is a manual authority based system also managed by train controllers based in the national centre.
- 5.3 Because it is more visible and is directly controlled by the train controller, the CTC system enables trains to be moved more efficiently and the distance between crossing stations tends to be shorter. As noted in 4.1 above the maximum speeds are also higher over this section of track.
- 5.4 The TWC system is a slower method of facilitating train movements particularly if multiple authorities are required en route because of other train movements or track maintenance activity. The crossing stations tend to be further apart.

6. STATION FACILITIES

- 6.1 The review looked at station facilities at:
- Christchurch
 - Ashburton
 - Timaru
 - Oamaru
 - Dunedin
 - Invercargill
- APPENDIX B (12) includes further information for each of these options.
- 6.2 Both Christchurch and Dunedin stations are fully operational passenger terminals. Christchurch is operated by KiwiRail and Dunedin by Dunedin Railways.
- 6.3 The Southern Rail operator would need to reach agreement with these organisations regarding management of passenger train operations through stations outside of their direct ownership or control. This would include facilities to stable the railcar overnight.
- 6.4 Ashburton station has been demolished and the remaining platform is considered unsuitable for the proposed service offering.
- 6.5 Timaru has potential to meet operational needs dependent on the needs of existing users and the scope of the passenger operation itself.
- 6.6 Oamaru presents a number of options including the station on the KiwiRail system or using one of two stations on the connected Oamaru Steam and Rail Society system.
- 6.7 Invercargill has a platform which is still connected to the KiwiRail system. The potential for operating as a terminal location will require further research, if needed.

7. TIMETABLE CONSIDERATIONS

7.1	Estimated running times for the Silver Fern Railcar	for are:
	Christchurch to	
	Timaru	2 hours 10 min.
	Oamaru	3 hours 20 min.
	Dunedin	5 hours 20 min.
	Invercargill	8 hours 50 min.

- 7.2 Running times for locomotive hauled passenger trains will vary by locomotive class / train weight, but will exceed those shown for the railcar.
- 7.3 Assuming two 90 minute stops at Timaru and Oamaru for off-train activity, a Christchurch - Dunedin railcar journey would take an estimated 8 hours 20 minutes.
- 7.4 Additional time must be factored for crew hours involved in preparing / positioning the railcar pre-journey and stabling at conclusion.
- 7.5 Adding the Dunedin - Invercargill section would increase the journey time to 11 hours 50 minutes necessitating additional crews, increasing exposure to timetable disruption, increase operating costs, reduce flexibility / recovery should disruptions occur and would add a significant portion of the track warrant-controlled territory.
- 7.6 Unless there is a key market consideration that would support operating south of Dunedin, it is recommended the service should operate between Christchurch and Dunedin.
- 7.7 The scheduled information below is therefore based on a Christchurch - Dunedin operation.
- 7.8 Route availability will be influenced by regular passenger and premium freight service train paths.
- 7.9 Availability of platform space at Christchurch Station is another key component given it has a single platform serving two daytime operations i.e. Tranz Alpine [to/from Greymouth] and Coastal Pacific [to/from Picton].
- 7.10 Present advertised timetables are as follows:

Coastal Pacific	Departs	0700
Tranz Alpine	Departs	0815
Tranz Alpine	Arrives	1830
Coastal Pacific	Arrives	2030

- 7.11 Additional platform occupancy time will be required for pre-departure / post arrival.
- 7.12 Platform availability at Dunedin Railway station must also be considered. Dunedin Railways' advertised Taieri Gorge timetables are as follows:

Middlemarch	Departs	0930
Pukerangi	Departs	1230
Middlemarch	Arrives	1530
Pukerangi	Arrives	1630

7.13 Platform congestion can be avoided as shown in the examples [Southern Rail services inserted in red] below:

CHRISTCHURCH

Coastal Pacific	Departs	0700
Tranz Alpine	Departs	0815
Southern Rail	Departs	0900
Southern Rail #	Arrives	1650
Tranz Alpine	Arrives	1830
Coastal Pacific	Arrives	2030

Departs Dunedin 0830

DUNEDIN

Southern Rail	Departs	0830
Middlemarch	Departs	0930
Pukerangi	Departs	1230
Middlemarch	Arrives	1530
Pukerangi	Arrives	1630
Southern Rail #	Arrives	1720

Departs Christchurch 0900

7.14 Applying the above departure times and the 90 minute stops at Timaru and Oamaru northbound and southbound schedules could be as follows:

SOUTHBOUND

Christchurch	Departs	0900
Timaru	Arrives	1110
	Departs	1240
Oamaru	Arrives	1350
	Departs	1520
Dunedin	Arrives	1720

NORTHBOUND

Dunedin	Departs	0830
Oamaru	Arrives	1030
	Departs	1200
Timaru	Arrives	1310
	Departs	1440
Christchurch	Arrives	1650

NB: These are indicative running times that will need to be validated by KiwiRail's scheduling system.

8. TRAIN CREW:

- 8.1 To operate trains on the KiwiRail Network, all locomotive crew and train guards must be trained / re-assessed to standards specified by KiwiRail.
- 8.2 Dunedin Railways locomotive crew and train guards are presently authorised, within their personal competencies, trains between Rolleston and Sawyers Bay, Port Chalmers and Mosgiel Station and the KiwiRail portion of the Taieri Branch.
- 8.3 Rolleston is the junction between the Main South and Midland [to Greymouth] Lines and is situated about 20 km [railway line] south of Christchurch. Extending certification to Christchurch would be relatively straightforward.
- 8.4 KiwiRail crews are used for their own charters and all charters (including Dunedin Railways') outside of the above area. Crews are based in Christchurch, Timaru, Dunedin and Invercargill.

9. LICENSING:

- 9.1 The Railways Act 2005, administered by NZ Transport Agency, requires a rail participant to have a Rail Licence.
- 9.2 A rail participant is any organisation or person responsible for the provision or maintenance of rail services. Section 4 of the Railways Act 2005 defines rail participants, as well as the responsibilities of access providers, rail operators and rail personnel.
- 9.3 Section 15 "Certain rail participants must be licensed" further defines:
 - (1) The following rail participants must hold a licence:
 - (a) A rail operator;
 - (b) An access provider;
 - (c) A rail participant who is required by regulations to hold a licence.
 - (2) If a person is a member of more than 1 class of rail participant to which subsection (1) applies, a single licence covering each of the classes of rail participant concerned may be issued to the person, and that licence may have different conditions for the different classes covered by it.
 - (3) Despite subsection (1), the Agency may, on the conditions that the Agency considers appropriate, exempt a person from holding a licence if all of the rail activities of that person are covered under—
 - (a) The licence of another licence holder; and
 - (b) The approved safety case of that other licence holder.
- 9.4 Should Southern Rail choose to operate its own rollingstock either including locomotives or on a "hook and tow" basis used KiwiRail or Dunedin Railways, they would become a rail participant and require a Rail Licence [1 (a) above].
- 9.5 Chartering rail services, including rollingstock, from KiwiRail and / or Dunedin Railways would likely exempt Southern Rail, given the



provisions of (3) above. In this case it would be important to ensure “all of the rail activities” remained under the control of the licenced operators.

10. ANALYSIS OF OPTIONS:

- 10.1 When considering the preferred rolling stock options, it will be important that Southern Rail is able to distinguish its service offering from the services already offered by KiwiRail and Dunedin Railways. There is a risk the only viable rollingstock providers may otherwise perceive Southern Rail as a service competitor rather than an operational customer. Perhaps the viability of a joint venture with either party should be considered.
- 10.2 The extent to which either organisation, or both, may be engaged to provide the trains will depend on the frequency of service required i.e. periodic charter v. regular service. As noted earlier, the latter may require availability of a second railcar to ensure more robust reliability / service delivery.
- 10.3 Offering multi modal tourist packages using a combination of train and coach in reverse directions would eliminate unproductive repositioning [e.g. coach Queenstown – Dunedin / train Christchurch and vice versa].
- 10.4 Using Dunedin and Christchurch stations as key departure / arrival points ensures stations of a higher standard and with operational facilities are used.
- 10.5 It would be preferable Southern Rail, at least initially, avoids “rail participant” status. This would be achieved either by 1) chartering train services from either supplier or 2) should a joint venture (or similar) be viable then ensuring Southern Rail is clearly identified as the marketing partner.

11. APPENDIX A – PASSENGER ROLLINGSTOCK

KiwiRail Scenic carriages: These carriages have been constructed to “tourist” standard, including buffet and observation carriages. Although there is a present surplus of carriages as a result of line damage / restoration impacting on the Coastal Pacific service between Christchurch and Picton this is now a short term surplus as it is expected the service will resume late 2018. It is unlikely South Island Scenic carriage stock could be released for MSL services on a casual or regular basis. They do nevertheless set an expected standard for tourists who may use both KiwiRail and Southern Rail services.



KiwiRail Charter carriages: The A class carriages have been withdrawn from service because they do not meet present standards for unrestricted operation on the KiwiRail Network. KiwiRail has advised there is a proposal to build new carriages using SA [Auckland Metro] carriage bodies. These will be built to a similar design /standard used for the Scenic carriages (above). Due to other workshop priorities, it is projected it will be about two years before they are ready for service.



Heritage carriages: A number of heritage organisations own carriages that are periodically used on the KiwiRail Network. There are speed restrictions associated with operating these carriages which would adversely impact on their use for medium distance tourist train operations. Historical seating arrangements etc. also make them unsuitable for tourist operations.



Auckland Transport carriages: SX and SA/SD carriages previously used for Auckland Metro operations are stored at Westfield and Taumarunui respectively. The present status of prospective sale to other organisations is not known, but some are likely to be available. The interior configuration of these vehicles is for metro passenger train operations (including doorways and in the case of the SD’s a driving cab). Converting these carriages for tourist passenger operations, including space for onboard generators, luggage, food & beverage etc., would involve considerable cost. Some savings could be achieved if these conversions were made as an extension to the proposed KiwiRail conversions, but these would be marginal rather than significant savings.



Silver Fern Railcars: Silver Fern railcars have 96 seats; a small galley for basic food and beverage preparation and delivery; limited luggage space capable of holding up to 90 medium size bags.



- **One railcar [RM24]** is leased to Dunedin Railways. It is presently used for “local” tourist services mainly between Oamaru and Dunedin. It is also used for periodic charter trains, managed by Dunedin Railways, between Dunedin and Invercargill and Christchurch [MSL] and on other routes in the South Island – Main North Line to Picton / Midland Line to Greymouth. For a periodic charter operation RM24 may be able to be utilised alongside Dunedin Railways existing scope of operations. This would require negotiation / ongoing co-operation with Dunedin Railways. RM24 is also fitted with an approved fire suppression system enabling it to operate through the Mihiwaka tunnel [refer further comment re RM30].
- **A second operational railcar [RM30]** is used for KiwiRail managed charters in both North and South Islands. In particular, it is used for cruise ship charters in the Christchurch area. A regular service may call for a second railcar to accommodate both operations and provide more robust reliability / service delivery. If the latter becomes the preferred option, if not initially but potentially in the medium to long term, the possibility of either chartering via a pre-established program [recognising Southern Rail and KiwiRail needs] or leasing RM30, perhaps in conjunction with Dunedin Railways, should be tested with KiwiRail. However, this may prove difficult in the short term given it is now the sole charter vehicle available to KiwiRail at least until the proposed carriages materialise. A relatively recent condition impacting MSL operations is a requirement for movements through Mihiwaka tunnel [one of six “class 1” tunnels on the network], between Sawyers Bay and Waitati to be hauled by motive power fitted with a fire suppression system. RM30 is not fitted with this system requiring the railcar to be locomotive hauled through the tunnel. As this incurs considerable additional cost it would be appropriate to establish if Dunedin City (lessee) or KiwiRail (owner) intend to fit a fire suppression system to the railcar.
- **A third non-operational railcar [RM18]** is stored at Otahuhu Workshops, Auckland. It is understood power bogies from this vehicle were used to refurbish RM30 during 2015. Further research will be required to determine the cost of restoring this railcar to operational condition.

12. APPENDIX B - STATION FACILITIES

Christchurch: The station is owned and operated by KiwiRail. It has a single platform with a passing loop for through train services.



Christchurch Station



Christchurch Station Platform

Ashburton: The station was demolished mid-2013. The station platform has been retained.



Ashburton Station Platform

Timaru: The station building was last reported as privately owned by Nelson-based businessman Gaire Thompson. Current use is unknown but was reported in media [2016] as “needing some work”. KiwiRail has retained ownership of the platform. The station has a café which is used by the local public and some coach services.



Timaru Station



Timaru Station Platform

Oamaru: Has one station on the KiwiRail corridor and two within the Oamaru Steam and Rail Society (OSRS) railway system. The latter are relevant as they are closer to the historical precinct.

The station on the KiwiRail corridor is privately owned. Current use is unknown but media report [2015] as requiring \$100,000 investment in upgrade within 18 months as a condition of sale to local artist Donald Paterson.



Oamaru Station



Oamaru Station Platform

The first station on the Oamaru Steam and Rail Society (OSRS) system is behind the historical precinct. It has a platform and overbridge. It is used by Dunedin Railways when operating services between Dunedin and Oamaru. The second station is on the opposite side of the precinct. It is more presentable and provides more comfortable access to nearby cafes, Steam Punk etc. However, clearances, platform height and accessibility for regular services would need to be explored further. Both Oamaru Steam and Rail Society stations are accessed via the interface with KiwiRail's system.



OSRS Station #1



OSRS Station #1

Dunedin: The station is owned by Dunedin City Council. Among other tenants, the station is used for passenger train operations by Dunedin Railways. Dunedin Railways also has locomotive / carriage storage tracks and a rail served maintenance facility.



OSRS Station #1



OSRS Station #1

Invercargill: Used by YMCA but on the market for sale [2015].



OSRS Station #1



OSRS Station #1



IMAGE BY VEERASAK PIYAWATANAKUL



IMAGE FROM SEETHESOUTHISLAND.COM

APPENDIX 2: CONFIDENTIAL PARTNER QUESTIONS.

OPERATIONAL QUESTIONS - DUNEDIN RAILWAY (responses are shown in red text)

Rollingstock:

1. Expected reliability of RM24 if used for increased operations?
 - Needs a replacement D398 motor. [Advisor estimates \$150,000 plus fit out - needs to be refurbished - motor no longer manufactured].
 - As you can see below both railcars (RM30 and RM24 are committed currently to KiwiRail's and Dunedin Railway's own services in the summer months. An option of purchasing new railcars should be considered.
2. Likelihood of entering agreement to use RM30 as short-term back-up i.e. if not committed to KiwiRail charter?
 - RM30 is KiwiRail's only charter vehicle and is committed to cruise ships just like RM24 so don't see it being available.
3. Likelihood / benefits of repositioning RM18 to Dunedin?
 - Likelihood is good, but KiwiRail is not making any decisions on the railcars until close to 2020.
4. Present known condition of RM18? What is required to bring it to operational standard?
 - I believe they are doing some structural work when time and budget permit as I believe it has major rusting around the luggage doors and some parts have been taken off and used in RM30 and RM24.
5. Likely minor maintenance arrangements - Christchurch?
 - We would more than likely be able to use the Mainline Steam facility at Sockburn.
6. Would a sharing arrangement with KiwiRail assist both organisations commit to providing a railcar for this service to ensure existing charter / scheduled services can be met?
 - Would need to be negotiated with KiwiRail but can't see it being an option.

Station Facilities

1. Can railcar be positioned at Harbourside Station, Oamaru - clearances, logistics etc.?
 - Yes. (I am getting the Oamaru Steam and Rail Societies General Manager to confirm meterage from level crossing to end of line.)
2. What are the pros / cons of using any of the three stations at Oamaru?
 - Station on KiwiRail system?
No issues for its use, but long way from town and historic precinct.
 - Station now used by Dunedin Railway?
No issues (best option)
 - Harbourside Station?
No issues (Closer than Dunedin Railway station to town.)
3. Does Dunedin Railway have any existing arrangements with KiwiRail / station owners for Oamaru, Timaru or Christchurch stations?
 - Platforms owned by KiwiRail and access agreements in place.
4. In the case of Christchurch would it be more beneficial to use / contract KiwiRail station staff to manage departures / arrivals?
 - Best option contract KiwiRail.
5. Has Dunedin Railways used [or can identify] stabling/servicing locations for railcar at Christchurch?
 - Currently we just store at Middleton but you could have the option of Mainline Steam at Sockburn or Scenic Journeys Waltham Yard.

Timetable Considerations:

1. Dunedin Railways view on potential schedule in draft report [note still to be discussed with KiwiRail]?
 - Looks good.
2. Will the suggested departure / arrival times create any issues for Dunedin Station operations?
 - We are a bit congested on cruise ship days around 0830hrs but could work around it.
3. Are there any potential clashes with Dunedin Railway or KiwiRail services?
 - KiwiRail is your main concern in short notice changes. [Schedule would be developed and agreed with KiwiRail before implementation – short notice changes would impact as would need to fit around pre-established schedule – need to be tied down in Access Agreement].
4. Are there preferred days for southbound / northbound journeys i.e. to fit in with Dunedin Railways other railcar commitments?
 - RM24 is committed to cruise ship trains from October to April (approx 80 days) and in August/September and April/May we use RM24 for rail touring.
5. Is there any benefit Dunedin Railway can see in extending the operation to Invercargill – tourist potential, crewing, railcar servicing & maintenance etc.?
 - There are added costs and operational issues due to the distance, but like Christchurch to Dunedin you would have to grow the market if you thought it was worthwhile.

Train Crew

1. Is it likely additional train crew would need to be recruited / trained to operate this service e.g. one return service / week - two return services / week?
 - Yes, additional crew would be required you're looking at around 500 hours OJT.
2. Likely recruitment / training lead time?
 - We currently have 4 loco engineers trained in the railcar, but only 2 have the route knowledge. Getting the other 2 trained would only take 1 to 2 weeks each to train. [Locomotive engineers age profile suggests there would be unlikely turnover in near future].
3. Dunedin Railway views on requirements to extend route knowledge for existing locomotive engineers from Rolleston to Christchurch (including stabling location)?
 - Easily extended..
4. Likely training lead time?
 - 3 return trips..
5. Any increase in Dunedin Station staff needed to support departure / arrival?
 - No current staff could cover.
6. If Oamaru Steam & Rail Society stations were used do they need to have staff on duty for the movement? Is there a joint operating plan?
 - Currently they open up for us and pilot us in but a regular service we could do it ourselves. Yes, there is a joint operating plan.

Licensing

1. Are there any licensing issues Dunedin Railway can identify – assume train operations fall under existing licences – KiwiRail and Dunedin Railway?
 - No issues I can think of.

APPENDIX 3: EXTENDED VISIT ITINERARY OPTION NOTES.

The market for a proposed Christchurch to Dunedin rail service is predominantly targeted at tourism travel. With the re-establishment of the Coastal Pacific Service between Picton and Kaikoura from December 1st, 2018, the full network of tourism train travel options available before the Kaikoura earthquake is re-established⁴. As stated in a Press Release (August 1st, 2018) by KiwiRail's GGM Sales and Commercial, Alan Piper:

"Before the earthquake the Coastal Pacific carried about 43,000 passengers into the Marlborough/Kaikoura regions during its summer season. These passengers are estimated to spend almost \$35m in the two regions, supporting 300 local jobs."

"Our scenic trains play an important role in getting domestic and international tourists out into often hard to reach regions and are becoming increasingly popular. Having the service back up and running reconnects our journeys across New Zealand allowing people to travel from Auckland to Christchurch and across to the West Coast by train and ferry."

"Overall, TranzAlpine passenger business has grown by 90% over the past five years, while the Northern Explorer is up 71%."

"KiwiRail is determined to champion tourism growth across the country, working with national and regional partners to deliver connected journeys and quality tourism experiences."

In the context of this demonstrated growth and network reconnection, the proposed extension of this network further south to Dunedin represents considerable opportunity. Christchurch already functions well as a hub for the successful TranzAlpine rail product and West Coast connections (to Greymouth), and could also do so for a southern connection. In turn Dunedin could function as a hub for local attractions the Taieri Gorge rail product and for various Central Otago/Southern South Island tourism hotspot connections (including a southern link to the West Coast and Greymouth).

It is unlikely that the Christchurch to Dunedin rail journey in itself would be the sole focus of most

passenger's travel. In the majority of cases it is more likely that the journey would be taken to provide some variety on wider travel circuits around the South Island/ New Zealand (including cruise visitors). This could be connected to any wider use of the train network as a tourism travel focus. But it is likely that most passengers would be using bus or hire-vehicle options for their general travel and taking only selected sections of rail network as particular experiences.

If rail services can be linked to a suitable extended network of key attractions, hop on/off itinerary options and/or good and cost-effective connecting services by bus or vehicle hire then uptake will likely be stronger (more attractive to a wider range of tourists).

Some travellers may arrive in Christchurch with the specific intention of undertaking such rail-related opportunities as part of their wider South Island tourism experience. This could include those arriving at Christchurch Airport or those already travelling through New Zealand (most commonly heading south down the East Coast). An additional number may have rail sections or discrete excursions available as a travel option associated with organised tour schedules (e.g. coach tour groups, cruise ship passengers). In both cases the rail journey would be a linked to a wider travel plan incorporating other tourism opportunities.

4. See the Great Journeys of New Zealand - <https://www.greatjourneysfnz.co.nz/>

A.1 ONGOING TRAVEL ITINERARY OPTIONS

There are three core route itinerary options available for ongoing journeys following a one-way rail trip from Christchurch to Dunedin (or vice-versa).

Table 3.1: Main Ongoing Route Options from Dunedin

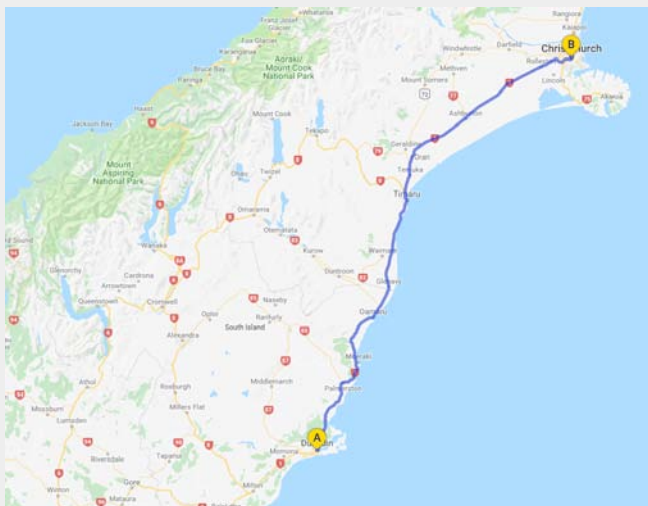
Options from Dunedin	Distance (approx. km)	Car Time (approx. excl. stops)	Bus Time (approx. excl. stops)	Train Option	Main Highlights (beyond Dunedin and Christchurch attractions)
1. Direct return to Christchurch	~360km	~4.5hrs	~5hrs	Return train journey	Timaru and Oamaru based opportunities.
2. North via Central Route (Cromwell)/McKenzie Basin	~640km	~7.5hrs	~9-10hrs	None	Central Otago, Queenstown (Milford), Mt Cook, Tekapo, Geraldine, Christchurch
3. North via Western Route (Cromwell/West Coast ⁵)	~950km	~ 12hrs	Multi-day/ bus service route	Greymouth -Christchurch (TranzAlpine)	Central Otago, Queenstown (Milford), Wanaka, South Westland, Fox/Franz Josef Glaciers, Greymouth, Northern Westland.

Beyond these three options is also a Southern Circuit option to continue south by road (hire car or limited bus options) to explore the southern South Island, potentially including time in the Catlins, Invercargill, Stewart Island and Fiordland (including Te Anau/Milford Sound) before returning via Queenstown to join Options 2 or 3 North at Cromwell. This extended circuit could involve multi-day travel of anything from 500-700km depending on route and options explored.

Assuming a Christchurch departure/base, the layouts and reference travel timings of the main 3 loop/return travel options are summarised below.

Option 1: Christchurch return direct from Dunedin

- Approximately 360km. A travel time (excluding stops) of ~4hrs 30min by car; ~ 5hrs by bus; and an estimated ~5-6 hours by train (if train available).
- This could also occur if travel was taken primarily to access further opportunities available from Dunedin (e.g. Dunedin attractions, longer loop options around the South Island, the Southern Circuit etc) or as a final return leg from such loops.

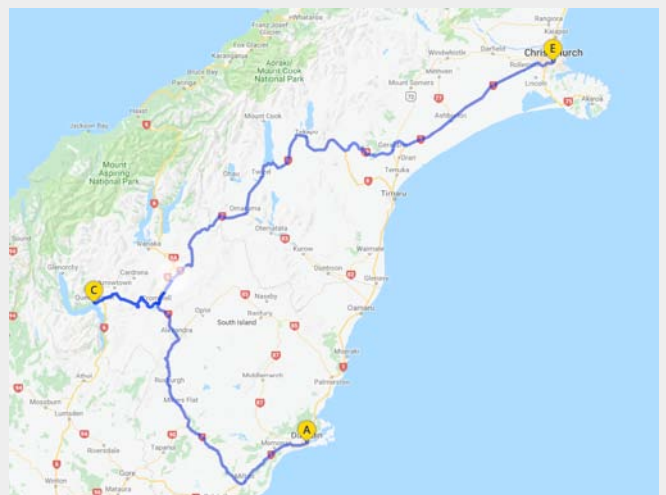


A variation on this travel option could be based upon an arrival at Queenstown Airport and road travel to Dunedin, then including a rail journey north to Christchurch.

- Queenstown to Dunedin – approximately ~280km. A travel time ~3hrs 30min by car or ~4hrs by bus.
- Dunedin by train to Christchurch – an estimated ~5-6 hours by train (if train available)

Option 2: Christchurch to Dunedin and return via Central Otago (Cromwell)

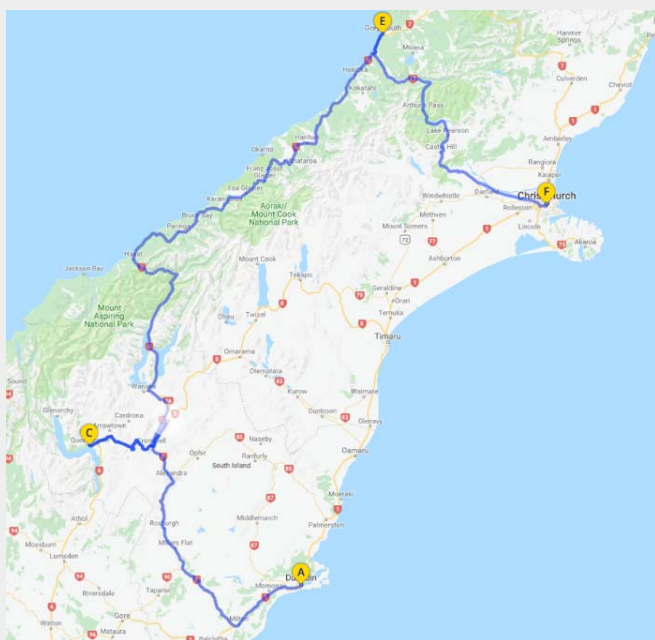
- Christchurch to Dunedin is approximately 360km. A travel time (excluding stops) of ~4hrs 30min by car; ~ 5hrs by bus.
- Dunedin to Cromwell – approximately 220km . A travel time ~2hrs 40 min by car; or ~ 3 hrs by bus. There is no Rail option other than partial travel to Middlemarch on the Taieri Gorge Railway (with only limited ongoing Rail Trail shuttle options).
- Allowing for an extended southern tourism diversion via Queenstown, the Cromwell to Queenstown distance is only ~60km. A travel time ~50 min by car or ~60min by bus.
- Cromwell to Christchurch – approximately ~420km. A travel time ~5hrs by car and ~6hrs by bus.



5. This assumes a visit to Greymouth, otherwise the road travel distance is a little shorter (~15km). From Greymouth travel North to Nelson/Picton can be via North Westland (Westport to Murchison) or centrally (Greymouth to Murchison).

Option 3: Christchurch to Dunedin and return via West Coast (Greymouth⁶)

- Christchurch to Dunedin is approximately 360km. A travel time (excluding stops) of ~4hrs 30min by car; ~ 5hrs by bus.
- Dunedin to Cromwell – approximately 220km . A travel time ~2hrs 40 min by car; or ~ 3 hrs by bus. There is no Rail option other than partial travel to Middlemarch on the Taieri Gorge Railway (with only limited ongoing Rail Trail shuttle options).
- Allowing for an extended southern tourism diversion via Queenstown, the Cromwell to Queenstown distance is only ~60km. A travel time ~50 min by car or ~60min by bus.
- Cromwell to Greymouth – approximately 500km. A travel time (excluding stops) o ~6hrs 30 min by car or ~10hrs by bus.
- Greymouth to Christchurch – approximately ~244km. A travel time ~3hrs 30min by car; ~ 4hrs by bus (West Coast Shuttles); ~4hrs 30min by train (i.e. TranzAlpine).



⁶ The only rail-related tourism hub available up the West Coast (i.e. the TranzAlpine).

A.2 OPTIONS FOR ONGOING TRAVEL - RENTAL CAR

There are numerous car rental agencies in the major rail destination/hubs located in the southern South Island and West Coast areas⁷. Virtually all of these would have outlets in the main centres, tourism hubs and airports further north in New Zealand. Upon reaching a rail-hub destination, numerous car rental options for drop-offs and pick-ups would be available to extend journeys. However, campervan rentals only operated significantly out of Auckland, Christchurch or Queenstown. Beyond the main airport hubs, there is very little flexibility with drop-offs/pick-ups for campervans to engage in alternative transport modes (although vehicles can be parked up while on excursions). A brief summary of rental vehicle availabilities at main transport hub localities (e.g. rail, air) is presented below:

Dunedin

Online searches showed 14 national/regional rental car company branches operating from Dunedin. Virtually all were nationally well-networked with numerous outlets. Companies represented include Ace; Avis; Budget; NZ Rent a Car; Europcar; Ezi Car; Handy; Hertz; NZ Rent A Car; Pegasus; RaD; USAVE; Thrifty; Jucy (Car only) and a few localised companies. However, there were no Campervan outlets in Dunedin (nearest in Queenstown or Christchurch).

Queenstown

Online searches showed around 20 national/regional rental car company branches operating from Queenstown. Virtually all were nationally well-networked with numerous outlets. Companies represented include Omega; GO; NZ Rent a Car; Avis; Hertz; Thrifty; Pegasus; Ace; About NZ; Budget; Ezi-Rent Car; Apex; Scotties; Snap; Touchdown; Affordable; Quality; Aerodrive; Discount; and a small number of localised Queenstown-based companies. There were also multiple national Campervan outlets in Queenstown (e.g. Maui, Britz, Mighty, Jucy and more).

Greymouth

Online searches showed 9 national rental car company branches operating from Greymouth including Europcar; Hertz; About New Zealand; NZ Rent A Car; Avis; Thrifty; Ezi-Rent Car; Ace; Half-Price Rentals. Most are also located in or very close to the i-Site/Railway Station. There are no campervan outlets in Greymouth (nearest with is Christchurch)

Christchurch

Online searches showed over 20 national/regional rental car company branches operating from Christchurch. Virtually all were nationally well-networked with numerous outlets. Companies represented include GO; Omega; RaD; NZ Rental Car; Budget; Ace; Bargain; Avis; Apex; Hertz; Jucy; Pegasus; USAVE; Scotties; About NZ; Snap; Touchdown; Europcar; Affordable; Quality; Aerodrive; Discount; and multiple localised Christchurch-based companies. There were also multiple national Campervan outlets in Christchurch (e.g. Maui, Britz, Mighty, Jucy, Spaceships and more).

⁷ Note that campervan hire outlets differ in being only present in the main tourist arrival/departure centres of Auckland, Christchurch (e.g. all, plus Apollo), Queenstown (e.g. Maui, Britz, Mighty, Spaceships) and also Wellington (e.g. Jucy).

A.3 OPTIONS FOR ONGOING TRAVEL - BUS

Overall, the Transitz New Zealand Company 'Intercity' (and its subsidiaries) provides the most comprehensive bus network in the South Island (and New Zealand). It services this national network with a scheduled timetable of services on interlinking routes, although many longer or more complex routes are only achievable with bus transfers and over multiple days. It has a number of hop on/off pass options available to service more tourism oriented needs. Its main competitor was Naked bus, which ceased operation in June 2018. The larger backpacker oriented bus companies operate set network routes based more upon tourism hubs and largely serve customers engaged in one of their set tour-route options (usually with hop on/off options).

Smaller localised coach and shuttle services also occur around tourism hubs/main centres but would not serve the longer-haul needs of train passengers requiring quick return to the Christchurch (unless they are travelling directly back to Christchurch from Dunedin or are on a larger organised group itinerary including charter buses etc). More 'freedom-travelling' passengers for whom the Christchurch-Dunedin train tip was just a small part of their longer exploration of the South Island would switch to alternative travel means and destinations. Based on this overall service mix, the following summary of bus services available in relation to the route options summarised in Table 3.1 above are as follows:

- **Route option 1** is currently achievable in a day through Intercity and Atomic Shuttles. Both run scheduled daily services with hop on/off options available. Many backpacker focussed hop on/off bus services do not feature services through Dunedin.
- **Route Option 2** is achievable only over 2 days. A changeover is required from buses originating in in the morning from Dunedin to services departing for Christchurch the following morning from Queenstown. (including a stop at Cromwell). The main provider would be Intercity (or its subsidiaries GreatSights NZ or Newmans Coach Lines). Some sections may have services provided by other companies but those would usually be parts of larger hop on/off itineraries (e.g. Kiwi Experience, Magic Bus, Stray Travel).
- **Route Option 3** is achievable only over 3 days. A changeover is required from buses originating in the morning from Dunedin to services departing the following morning for Franz Josef from Queenstown (including a stop Cromwell). Another bus would be required the following morning from Fox (including a stop at Franz Josef) to Greymouth. The main provider would be Intercity. Some sections may have services provided by other companies but those would usually be parts of larger hop on/off itineraries (e.g. Kiwi Experience, Magic Bus, Stray Travel). However, for Greymouth to Christchurch the only InterCity service is the TranzAlpine Railway (although other backpacker types of bus services do use the route e.g. West Coast Shuttles).



IMAGE BY JAMES WHEELER

APPENDIX 4: EXTENDED VISITOR OFFER.

The ongoing travel options from tourism and rail hubs summarised in Appendix 3 offer opportunities to experience a number of different areas and activities in the South Island. The following describe some key tourism hub areas potentially accessed in association with Christchurch-Dunedin based rail journeys (and related return trips to Christchurch). Brief summary descriptions of the main types of attraction opportunities available at these hub areas are made below.

Dunedin City

Dunedin is the destination for a rail service from Christchurch down the East of the South Island. From Dunedin these passengers could return directly to Christchurch the next day by rail, bus or hire car as desired (e.g. Ongoing Route Option 1). However, from Dunedin they also have options to undertake extended non-rail return journeys around more extensive areas of the South Island (e.g. Route Options 2 & 3, plus the Southern Circuit). It is also a common stopover for cruise ships, meaning some passengers dropped in Lyttleton for the train journey could re-join their ship here). In Dunedin itself there also are a range of key attractions that may hold many visitors in the City. Most involve experiencing the City's heritage (e.g. Victorian/Edwardian architecture featuring the Railway Station; Otago Museum and Toitu Early Settlers Museum; Larnach Castle; Olveston etc.) natural environment/wildlife (e.g. Otago Peninsula tours, Dunedin beaches, Wildlife Orokonui Sanctuary etc.), and with the added rail-specific feature attraction of the Taieri Gorge Rail trip (which can link to the well-known Otago Central Rail Trail through to Alexandra/Clyde).

Southern Circuit

Invercargill is only 2hrs 30min south of Dunedin by road, and the natural heritage attraction of the Catlins is only around 1hr 30mins south along the coast. The port of Bluff near Invercargill has been used by some cruise ships in transit to or from Milford Sound, and Stewart island is accessible from Invercargill in as little as 1hr by express ferry or 20min by plane. The gateway to Fiordland and Milford Sound is Te Anau and it is ~2hrs from Invercargill along the shortest route, or ~3hrs by the more scenic south coast/Fiordland route via Tuatapere and Manapouri. From Te Anau it is ~3hrs return by road to Milford Sound, although there are many attractions along the way to lengthen journey durations. Traveling on to Queenstown from Te Anau is ~3hrs by road.

Central Otago/Queenstown

Assuming a direct return journey to Christchurch isn't being made, travel north from Dunedin requires going to Central Otago. Cromwell represents a key crossroads for accessing Queenstown and Fiordland to the west, or for travelling further North. From Cromwell the options northward involve either:

- going west over Haast Pass to the West Coast (e.g. Fox and Franz Josef Glaciers, Hokitika) towards Greymouth, or
- continuing inland over Lindis Pass through the Mackenzie Basin (e.g. Mt Cook, Tekapo) towards Christchurch.

In Central Otago/Queenstown there are a range of key attractions that may hold many visitors in the area. The towns of Cromwell, Alexandra, Wanaka and Queenstown all provide significant hubs for experiencing high quality adventure, food, wine, sightseeing and touring. Queenstown in particular with its international airport is a premiere tourism destination for scenery and adventure, which provides added opportunities for access to Milford Sound (~9hrs return by road or ~1hr by air), Southern Fiordland and renowned backcountry. Alexandra provides a key hub near the end of the Otago Central Rail Trail, along with numerous fruit-growing, wine and gold-mining heritage tourism opportunities. In Cromwell visitors can experience the Highlands Motorsport Park; trips on Lake Dunstan and the Kawarau River; the numerous wineries, and more gold-mining heritage tourism opportunities. And Wanaka offers a range of activities from backcountry adventuring through to the car, plane and toy collections at the Warbirds and Wheels Museum and the National Transport and Toy Museum. Numerous attractive options exist.

Southern Westland

Travelling west then north from Central Otago through Haast Pass gives an experience of the Te Wahipounamu South West New Zealand Wilderness World Heritage Area. This is a common route north for travellers touring the South Island, with the Fox and Franz Josef Glaciers providing key tourism stopover attractions. There are also numerous other wilderness, nature and adventure opportunities spread along the route along the coast through Hokitika towards Greymouth. The large bulk of travel through this area would be by private or hired vehicles.

Greymouth

Greymouth provides the gateway to Northern Westland is the turnaround destination for the TranzAlpine Railway journey from Christchurch. This rail link is the main means of direct public transport between Greymouth and Christchurch via Arthurs Pass. It also offers the opportunity for any Christchurch to Dunedin rail passengers who are returning to Christchurch up the West Coast to take an additional train journey back. This is also the route of the main road connection between Christchurch and the West Coast. For those travelling by road there are numerous nature and scenic opportunities along the way. It also offers the opportunity to head further North along the coast to Westport and Karamea, although heading north towards Nelson and Picton requires turning inland at Westport to join a more direct inland route North from Greymouth.



Mackenzie Basin

Travelling centrally north from Central Otago through the Lindis Pass gives an experience of the scenic Mackenzie Basin and South-Central Canterbury towards Christchurch. This is the main route between Central Otago and Canterbury/Christchurch. It passes by the Lakes Ohau, Pukaki and Tekapo areas which all offer significant scenic and backcountry adventure opportunities, as well as access to Mount Cook National Park. These areas are also linked by proximity to Timaru, the Waitaki Valley and Oamaru.



Christchurch City

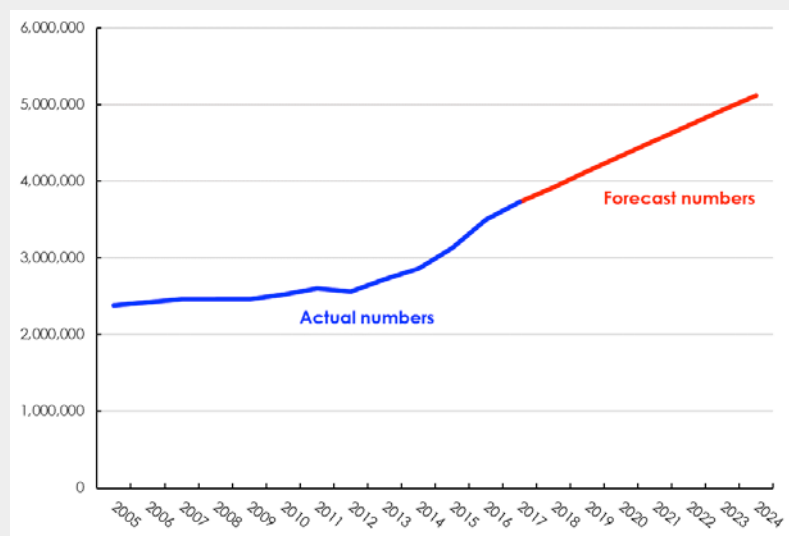
Christchurch City represents the key gateway to access rail-based travel experiences in the South Island. It has been integral to the past Coastal Pacific rail attraction (soon to be recommenced) and is the hub for the current and successful TranzAlpine rail attraction. Through its international airport and port of Lyttleton it provides the nation's second main tourism entry point and the main entry point to the South Island. Christchurch's position as a tourism attraction in itself has been both compromised and enhanced in different ways by the recent earthquakes. But its strategic hub position in New Zealand's tourism network has remained significant and it represents the main gateway to the South Island. Many of its traditional attractions are being progressively reactivated post-earthquake and these will be complemented by the growth of new attractions emerging from the Christchurch rebuild. In terms of South Island tourism travel almost 'all roads lead to Christchurch' at some point.



APPENDIX 5: MARKET GROWTH INDICATORS.

This appendix notes some key tourism trend examples which indicate continued growth can be anticipated in baseline tourism visitor numbers⁸. These are a mix of recent trend indicators and future forecasts. From an overall international visitor arrivals perspective, Figure 1 illustrates a strongly growing tourist visitor market in New Zealand overall. These increased recent arrival rates are also forecast to be sustained over the next 5 years (longer forecasts are not available).

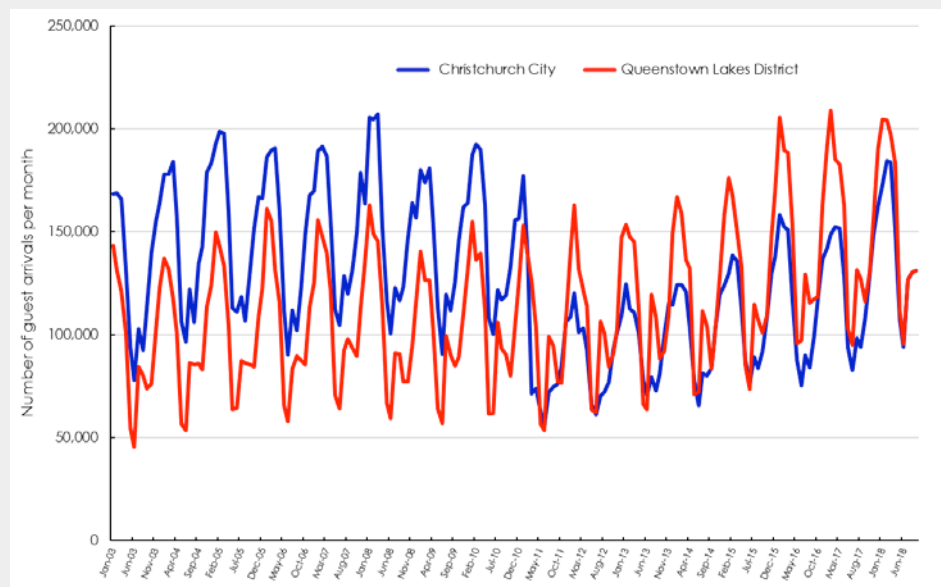
Figure 1: Actual and forecast International Visitor Arrivals (2005-2024)



Source: MBIE Tourism Forecasts 2018-2024: International Visitor Arrivals to New Zealand

Looking more specifically at one visitor trend indicator associated with the local Christchurch and Queenstown tourism hubs, Figure 2 reflects the strong recent overall growth trends (and highlights seasonality patterns). In the case of Christchurch this growth also represents a strong earthquake recovery response. Results quoted at the start of Appendix 3 also highlight the success achieved over recent years with other rail tourism opportunities associated with Christchurch.

Figure 2: Monthly Guest Arrivals: Christchurch City and Queenstown-Lakes District



Source: MBIE Accommodation Survey: Guest arrivals per month (2003-2018)

⁸ Further analyses at greater depth and specificity of market can be undertaken in any follow-up investigations.



IMAGE BY PIXA BAY