Visitor Demand Mapping **for Queenstown**

Short term 30 day forward outlook & long term scenarios

Published Friday 26 February 2021

Queenstown NEW ZEALAND | HOME OF ADVENTURE

Short term visitation
30 Day Forward Outlook

Overview

Destination Queenstown has developed a 30 day forward outlook chart indicating the current levels of accommodation occupancy in Queenstown. This is based on collated information from multiple data sets covering commercial and non-commercial accommodation. The 30 day forward outlook chart is weighted 80% on currently booked forward occupancy rates and 20% on predictive forward booking data.

The objective of this 30 day forward outlook chart is to assist local tourism businesses like activities, attractions, retail, bars and restaurants to manage their operating days/hours, supply and staffing in alignment with the forward outlook.

Frequency

DQ will publish the report at the end of the month for the upcoming 30 day period included in the Visitor Demand Mapping Resource. There will be weekly refreshes of the forward outlook chart which will be posted in the DQ Member (Visitor Demand Mapping) area of the DQ website.

Click HERE to access previous outlooks.

Feedback

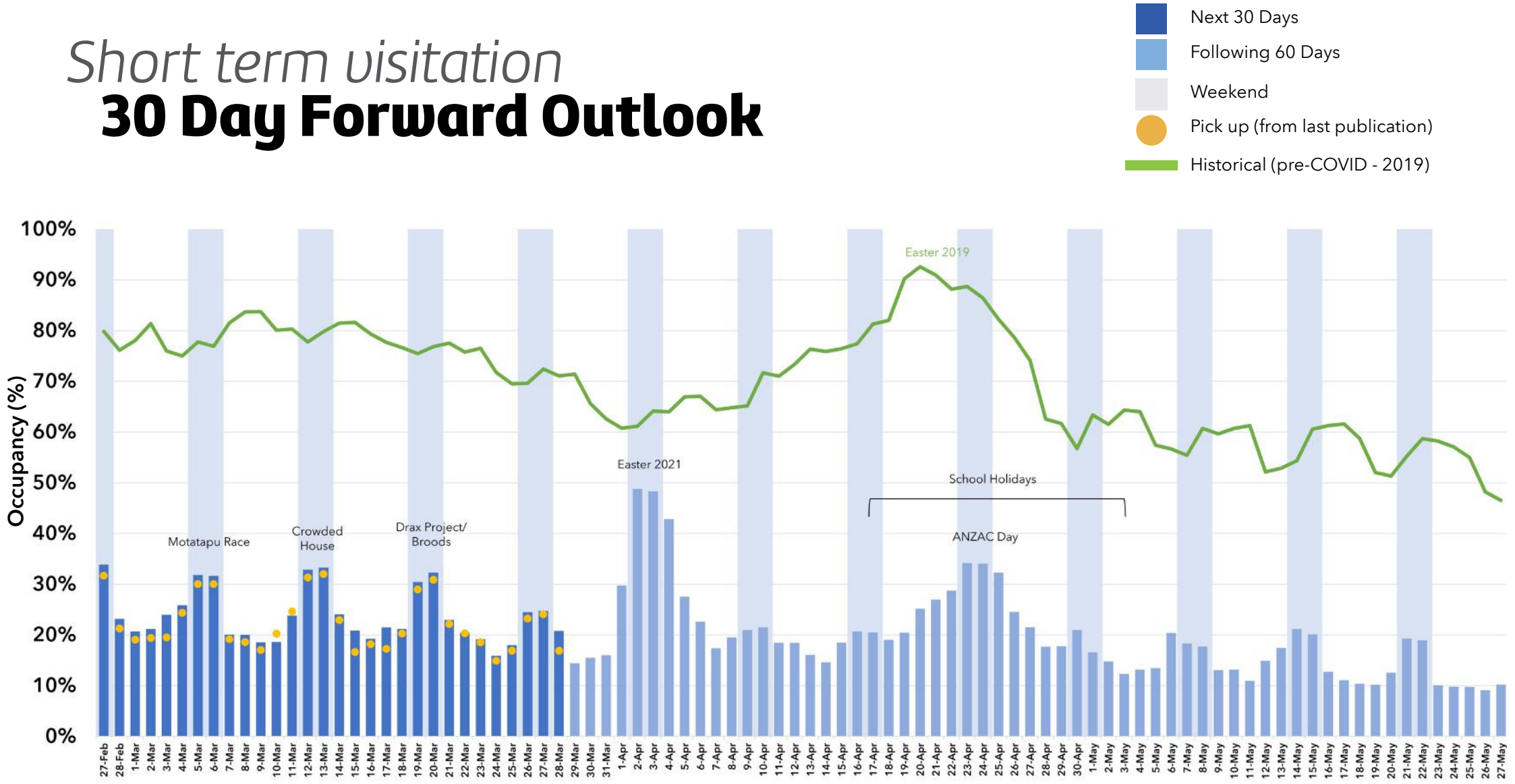
For feedback, more information or clarifications about the content below or if you are interested in supplying your accommodations data toward the dataset please contact Kiran (kirann@queenstownnz.nz).

Data Sources

	STR FORWARD STAR	AIRDNA – FUTURE DEMAND ANALYSIS
DATA SOURCE	str	AIRDNA
INFORMATION	Based on real occupancy on the books from a set of 12 properties. Free to submit data if you are part of STR.	Forward looking occupancy rates (actuals) in a set of over 1,800 active alternative lodging properties in the wider Wakatipu basin.

	OTA INSIGHTS	AIR NEW ZEALAND
DATA SOURCE	OTA INSIGHT	AIR NEW ZEALAND
INFORMATION	Market intelligence capturing booking intent in real time. Takes into account OTA, GDS, alternative lodgings. Gives a "heat" map.	Weekly seat capacity growth compared to same week last year. Share monthly.

Short term visitation
30 Day Forward Outlook



This edition published on Friday 26 February 2021 indicates the current demand for the 30 day period 27 February 2021 to 28 March 2021 (plus the following 60 days). The next update will be on Friday 5 March for the following 30 days (plus 60 days)

Disclaimer: This tool represents only a potential scenario for what occupancy could look like over the coming period, it is not an actual forecast. This tool has been created solely for the use of Destination Queenstown Members, and is not for publication or dissemination.

Long term visitation
Visitor Demand Mapping

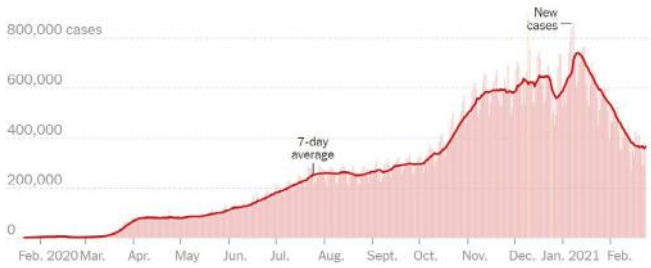
This is an update to the Visitor Demand Mapping for Queenstown-Lakes (2020 to 2024) report published on Thursday, May 14, 2020. You can get the full version of the earlier report here. For further feedback, more information or clarifications about the content below please contact kirann@queenstownnz.nz

Covid-19 Situation

This current month seems to be the long awaited turning point in the management of the global pandemic. Firstly, active new cases across all continents saw a sharp decline moving from January to February 2021; and secondly the penetration levels of the vaccine across several countries have been extremely encouraging.

Fresh Covid-19 cases for the week ended 14 February were the lowest since October, at 2.7 million. America has seen a dramatic drop with their 14 day average change in new case numbers decreasing by 40% compared to the global change of 19%. The death toll is starting to ease as well albeit at a less dramatic pace. Experts are saying its likely too early to count vaccines as the major reason, more likely its linked to the efforts of social distancing and lockdowns.

Daily new confirmed cases & 7 day average



Vaccines

Currently there are 73 vaccines in clinical evaluation with 21 reaching the final phases of testing in human candidates. A total of seven vaccines are now available for early or limited use with a further four approved for full use, in limited quantities, in at least 92 countries. There are a further 182 potential vaccines in preclinical evaluation. As countries such as Israel, England and Scotland progress their vaccine roll out there are encouraging developments as further research is conducted.

Early data from the roll out of the AstraZeneca Vaccine is showing strong evidence vaccines were working as intended, offering among the clearest signs yet that the vaccines slash the rate of Covid-19 hospital admissions and may be reducing transmission of the virus. British studies have found a single dose of either the AstraZeneca vaccine or the one made by Pfizer could avert most coronavirus-related hospitalizations, though researchers said it was too early to give precise estimates of the effect.

In a study in Israel the Pfizer-BioNTech has shown that its robustly effective after the first shot, echoing what other research has shown for the AstraZeneca vaccine and raising the possibility that regulators in some countries could authorize delaying a second dose instead of giving both on the strict schedule of three weeks apart as tested in clinical trials. It was also announced that the vaccine can be stored at standard freezer temperatures for up to two weeks, potentially expanding the number of smaller pharmacies and doctors' offices that could administer the vaccine, which now must be stored at ultra cold temperatures.

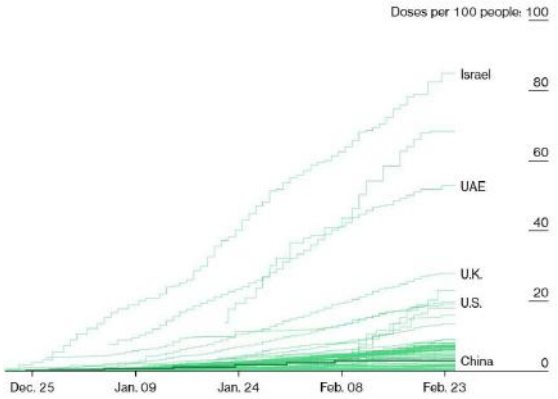
The one-shot vaccine made by Johnson & Johnson has shown that it provides strong protection against severe disease and death from Covid-19. This vaccine has a 66% efficacy rate but its easier to take with only one shot needed and can be stored at normal refrigeration temperatures for up to three months.

For further information about vaccine development and approvals check out the New York Times Coronavirus Vaccine Tracker by clicking HERE

Vaccine Roll Out

At the time of publishing 218 million doses in 99 countries have been administered, according to data collected by Bloomberg. The latest rate was roughly 6.15 million doses a day, on average.

Global Vaccination Campaign – Doses administered per 100 people



Long term visitation
Visitor Demand Mapping

Global Vaccination Campaign
Top 10 countries in vaccination progress

Country	Doses Given	Per 100 people
Global Total	*218,968,621*	-
U.S.	66,464,947	20.02
China	40,500,000	2.89
EU	28,926,436	6.51
U.K.	18,911,978	28.31
India	12,366,633	0.9
Israel	7,782,029	85.98
Turkey	7,775,503	9.35
Brazil	7,573,382	3.6
UAE	5,761,463	53.6
Germany	5,373,222	6.47

For Bloomberg's full breakdown of vaccination progress, vaccine contracts in place for each country and research and development time lines click HERE

In New Zealand the vaccine roll out has officially begun. The first batch of 60,000 doses (or 30,000 two course doses) arrived on a Singapore Airlines flight in the country on 15 February and roll out officially started on 20 February with border workers and their families first receiving vaccines followed by healthcare and essential workers then vulnerable older people. The roll out to the wider population will happen in the second half of 2021. So far only the Pfizer and BioNTech (Comirnaty) vaccine has Medsafe approval. For full details of New Zealand's COVID-19 Vaccine planning click HERE

Australia has also officially started their vaccine campaign as well with Prime Minister Scott Morrison receiving his first dose of the Pfizer vaccine on 21 February, roll out starts with 60,000 doses being administered this week. Currently Australia's medical regulatory has approved the Pfizer and Oxford Zeneca vaccines. Australia aims to have 4 million people vaccinated by the end of March. For the full roll out plan click HERE

Vaccines & Travel

As vaccines programs are in full swing or getting underway more attention has turned to the eventual restart of cross border travel and what that will look like. Several Vaccine Passport options are under development. Basically, a Vaccine Passport would serve as an easily accessible and verifiable certification that a person has been inoculated. The idea would be to create an updated version of the so-called yellow card, more formally known as the International Certificate of Vaccination or Prophylaxis, a World Health Organization-approved booklet documenting your past inoculations. So far WHO is not supporting or recommending implementing these measures on the grounds that its not yet known if being vaccinated actually stops transmission and secondly that the vaccines are in limited supply.

There are currently three main contenders in the vaccine passport space – IBM's Digital Health Pass (read more HERE), CommonPass (read more HERE) and IATA's Travel Pass (read more HERE)

Air New Zealand has announced it will trial a digital vaccination passport using IATA's Travel Pass on flights between Auckland and Sydney from April. The Travel Pass app will allow travelers to create a 'digital health wallet' that is linked to their passport. Once they have been tested or vaccinated, the lab can securely send that information to the app, which is then cross-checked against the travel requirements for the country they hope to visit.

Tests

Air New Zealand is taking part in a study of saliva testing while also completing the usual swab test to see if the saliva test is an easier and accurate way to detect Covid-19.

America is continuing to ramp up production of at home tests – using both saliva and nasal swab tests investing $232 million with Australia based Ellume who will deliver 8.5 million at home tests by the end of the year.

Long term visitation
Visitor Demand Mapping

Updates to timeline

Several sources have been utilized and compared to develop the opposite timeline expectations.

In this update we have compared the time frame with the Tourism Export Council's Forecasts received 4 February, Westpac's Quarterly Economic Overview up and Auckland Airport's 2021 interim results plus wider commentary from sources such as the Government.

At this point we have kept potential scenarios for projections of timelines the same as the last update but will review before the next update on 26 March 2021.

Timeline

MARKETS	CONSERVATIVE	MID	OPTIMISTIC
HORIZON 1			
Regional Market, New Zealand Domestic Market	OPEN	OPEN	OPEN
HORIZON 2			
Trans-Tasman Australia	NOV 2021	SEPT 2021	JUL 2021
HORIZON 3			
Long Haul Markets	MAR 2022	FEB 2022	JAN 2022

Note regarding MRTE's

Please note that we have used the Monthly Regional Tourism Estimates as the measure for these scenarios.

MBIE have acknowledged that there have been significant changes within the tourism industry which has impacted the underlying assumptions within their modeling. MBIE encourage caution when interpreting results. Please interpret these scenarios with caution.

For reference please find links to:

Westpac's Quarterly Economic Overview – link HERE

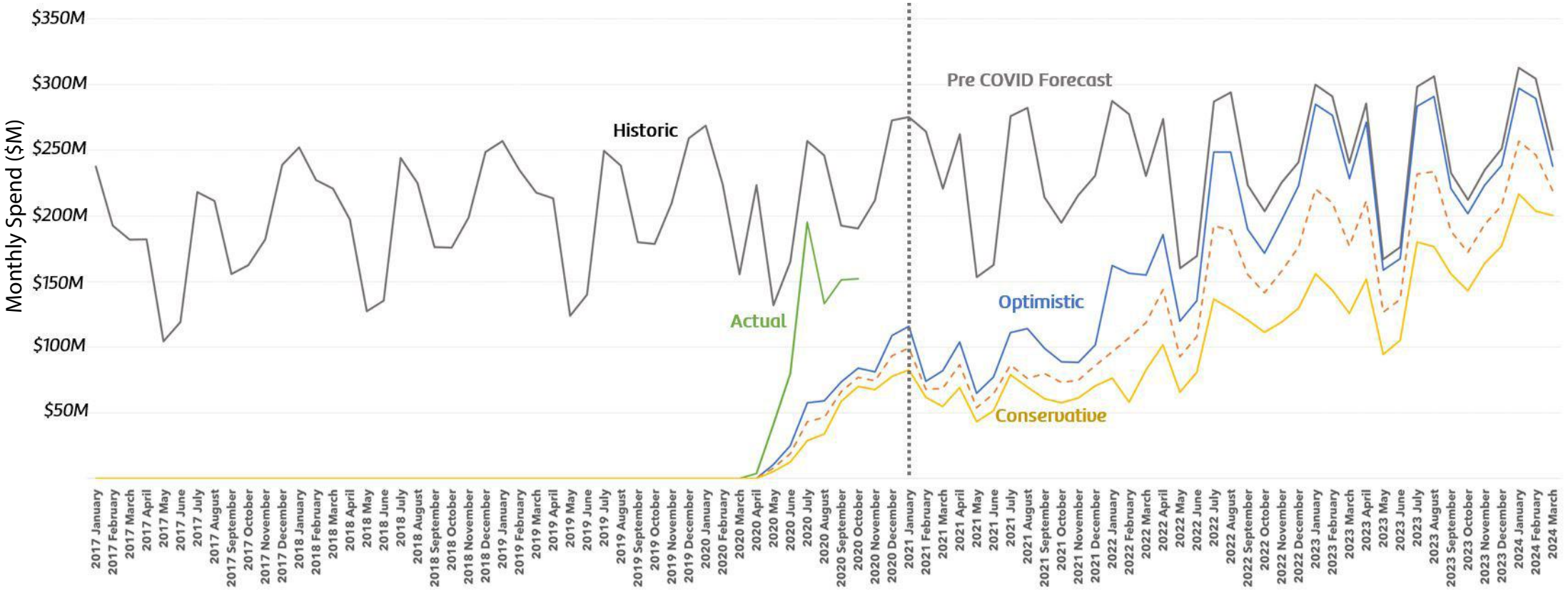
Auckland Airport's FY21 Interim Results: Media Release – link HERE

Tourism New Zealand (released 17 December 2020): December Scenario Modeling

Tourism Export Council Modeling visual roadmap (released 14 January 2021): Best case forecast, Acceptable forecast, Worst case forecast

Long term visitation

Visitor Demand Mapping



This edition published on Friday 26 February 2021 indicates range of potential scenarios for a return to spending (domestic and international) / level of demand in Queenstown up until March 2024

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Long term visitation
Visitor Demand Mapping

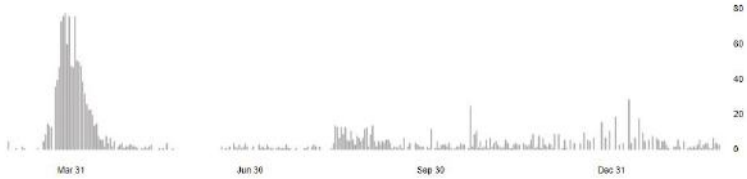
	Optimistic				Mid				Conservative			
	Domestic	Australia	Long Haul	TOTAL	Domestic	Australia	Long Haul	TOTAL	Domestic	Australia	Long Haul	TOTAL
2020 May	20%	0%	0%	**8%**	15%	0%	0%	6%	10%	0%	0%	**4%**
2020 June	40%	0%	0%	**15%**	30%	0%	0%	11%	20%	0%	0%	**8%**
2020 July	60%	0%	0%	**22%**	45%	0%	0%	17%	30%	0%	0%	**11%**
2020 August	70%	0%	0%	**24%**	55%	0%	0%	19%	40%	0%	0%	**14%**
2020 September	100%	0%	0%	**38%**	90%	0%	0%	34%	80%	0%	0%	**31%**
2020 October	120%	0%	0%	**44%**	110%	0%	0%	40%	100%	0%	0%	**37%**
2020 November	120%	0%	0%	**38%**	110%	0%	0%	35%	100%	0%	0%	**32%**
2020 December	140%	0%	0%	**40%**	120%	0%	0%	34%	100%	0%	0%	**29%**
2021 January	140%	0%	0%	**42%**	120%	0%	0%	36%	100%	0%	0%	**30%**
2021 February	120%	0%	0%	**28%**	110%	0%	0%	26%	100%	0%	0%	**23%**
2021 March	120%	0%	0%	**37%**	100%	0%	0%	31%	80%	0%	0%	**25%**
2021 April	120%	0%	0%	**40%**	100%	0%	0%	33%	80%	0%	0%	**26%**
2021 May	120%	0%	0%	**42%**	100%	0%	0%	35%	80%	0%	0%	**28%**
2021 June	120%	0%	0%	**48%**	100%	0%	0%	40%	80%	0%	0%	**32%**
2021 July	95%	20%	0%	**40%**	88%	0%	0%	31%	80%	0%	0%	**29%**
2021 August	95%	40%	0%	**40%**	88%	0%	0%	27%	80%	0%	0%	**25%**
2021 September	95%	50%	0%	**46%**	88%	25%	0%	37%	80%	0%	0%	**28%**
2021 October	95%	50%	0%	**46%**	88%	25%	0%	38%	80%	0%	0%	**30%**
2021 November	95%	60%	0%	**41%**	88%	38%	0%	35%	80%	15%	0%	**28%**
2021 December	95%	60%	0%	**44%**	88%	38%	0%	37%	80%	15%	0%	**31%**
2022 January	95%	70%	30%	**56%**	88%	43%	0%	34%	80%	15%	0%	**27%**
2022 February	95%	70%	40%	**56%**	88%	45%	20%	39%	80%	20%	0%	**21%**
2022 March	95%	70%	50%	**67%**	88%	45%	33%	52%	80%	20%	15%	**36%**
2022 April	95%	70%	50%	**68%**	88%	45%	33%	53%	80%	20%	15%	**37%**
2022 May	95%	80%	60%	**75%**	88%	60%	38%	58%	80%	40%	15%	**41%**
2022 June	95%	90%	60%	**80%**	88%	65%	40%	64%	80%	40%	20%	**48%**
2022 July	95%	95%	70%	**87%**	88%	68%	45%	67%	80%	40%	20%	**48%**
2022 August	95%	95%	70%	**85%**	88%	68%	45%	64%	80%	40%	20%	**44%**
2022 September	95%	95%	70%	**85%**	88%	68%	55%	70%	80%	40%	40%	**54%**
2022 October	95%	95%	70%	**84%**	88%	68%	55%	70%	80%	40%	40%	**55%**
2022 November	95%	95%	80%	**87%**	88%	68%	60%	70%	80%	40%	40%	**53%**
2022 December	95%	95%	90%	**93%**	88%	68%	65%	73%	80%	40%	40%	**54%**
2023 January	95%	95%	95%	**95%**	88%	68%	68%	73%	80%	40%	40%	**52%**
2023 February	95%	95%	95%	**95%**	88%	68%	68%	72%	80%	40%	40%	**49%**
2023 March	95%	95%	95%	**95%**	88%	68%	68%	74%	80%	40%	40%	**52%**
2023 April	95%	95%	95%	**95%**	88%	68%	68%	74%	80%	40%	40%	**53%**
2023 May	95%	95%	95%	**95%**	88%	78%	68%	76%	80%	60%	40%	**57%**
2023 June	95%	95%	95%	**95%**	88%	78%	68%	77%	80%	60%	40%	**60%**
2023 July	95%	95%	95%	**95%**	88%	78%	68%	78%	80%	60%	40%	**60%**
2023 August	95%	95%	95%	**95%**	88%	78%	68%	76%	80%	60%	40%	**58%**
2023 September	95%	95%	95%	**95%**	88%	78%	78%	81%	80%	60%	60%	**67%**
2023 October	95%	95%	95%	**95%**	88%	78%	78%	81%	80%	60%	60%	**67%**
2023 November	95%	95%	95%	**95%**	88%	88%	78%	82%	80%	80%	60%	**70%**
2023 December	95%	95%	95%	**95%**	88%	88%	78%	83%	80%	80%	60%	**70%**
2024 January	95%	95%	95%	**95%**	88%	88%	78%	82%	80%	80%	60%	**69%**
2024 February	95%	95%	95%	**95%**	88%	88%	78%	81%	80%	80%	60%	**67%**
2024 March	95%	95%	95%	**95%**	88%	88%	88%	88%	80%	80%	80%	**80%**

Long term visitation

Visitor Demand Mapping – COVID cases (WHO)

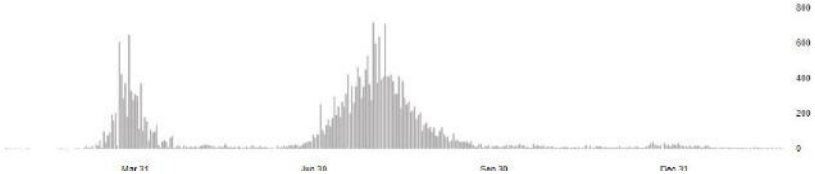
New Zealand

2,012
confirmed cases



Austalia

28,939
confirmed cases



China

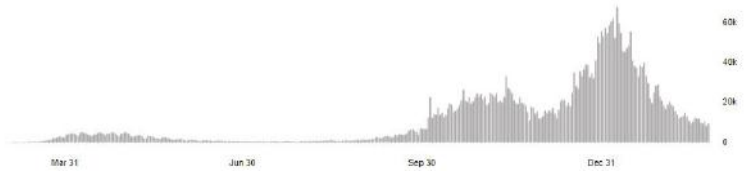
101,778
confirmed cases

United States

27,955,338
confirmed cases

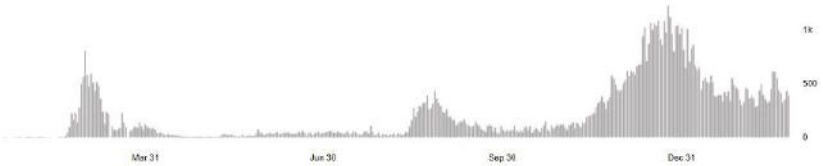
United Kinadom

4,144,581
confirmed cases



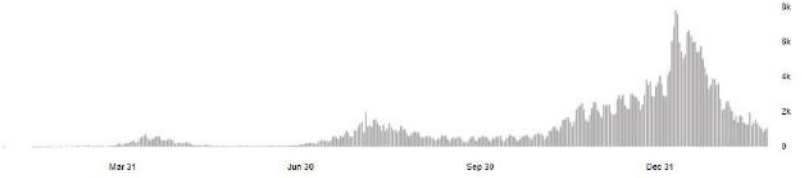
South Korea

88,516
confirmed cases



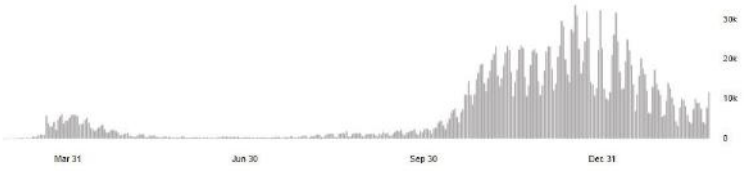
Japan

428,553
confirmed cases



Germany

2,414,687
confirmed cases

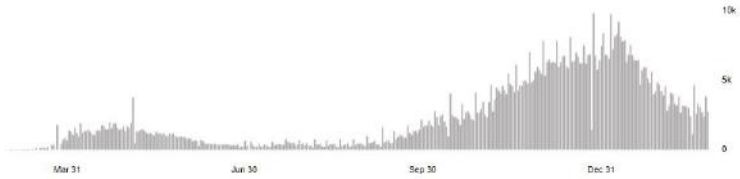


Long term visitation

Visitor Demand Mapping – WHO COVID cases

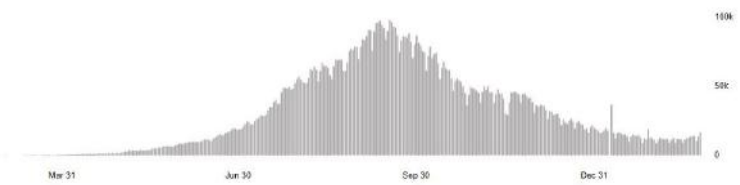
Canada

852,269
confirmed cases



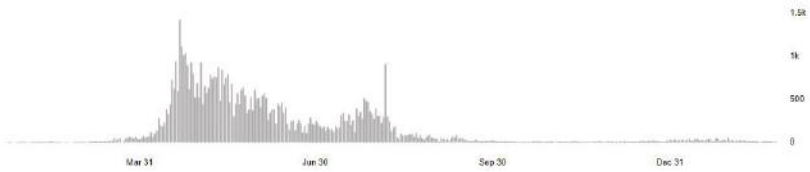
India

11,046,914
confirmed cases



Singapore

59,890
confirmed cases



Global

112,209,815
confirmed cases