

Visitor Demand Mapping for Queenstown

Short term 30 day forward outlook & long term scenarios
Published on Friday 26 March 2021

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. There will be a fortnightly refresh mid-month for the following 30 days.

These outlooks are available in the DQ Member 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 kirann@queenstownnz.nz.

Data Sources

DATA SOURCE



STR FORWARD
STAR



AIRDNA – FUTURE DEMAND
ANALYSIS

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.

DATA SOURCE



OTA
INSIGHTS

OTA INSIGHT

AIR
NEW ZEALAND

AIR NEW ZEALAND

INFORMATION



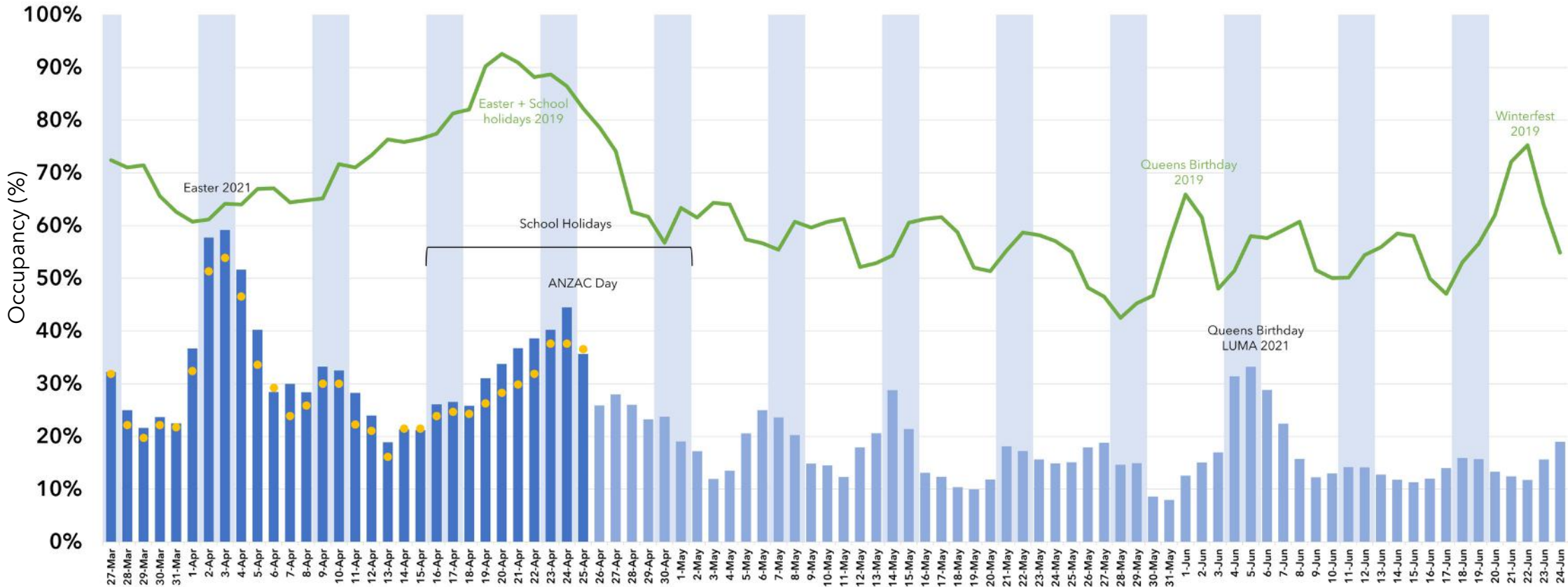
Market intelligence capturing booking intent in real time. Takes into account OTA, GDS, alternative lodgings. Gives a "heat" map.

Weekly seat capacity growth compared to same week last year. Share monthly.

Short term visitation

30 Day Forward Outlook

- Next 30 Days
- Following 60 Days
- Weekend
- Pick up (from last publication)
- Historical (pre-COVID - 2019)



This edition published on Friday 26 March 2021 indicates the current demand for the 30 day period 27 March 2021 to 25 April 2021 (plus the following 60 days). The next update will be on Thursday 1 April 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

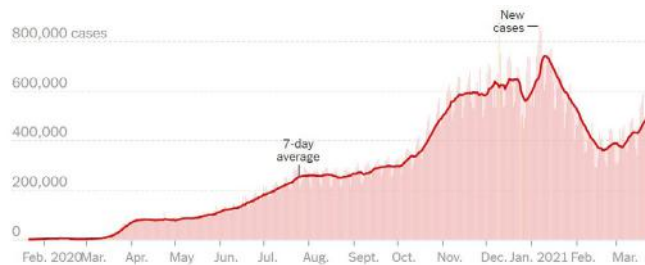
Visitor Demand Mapping

This is an update to the *Visitor Demand Mapping for Queenstown-Lakes (2020 to 2024)* report published on Thursday, May 14, 2020. You can view 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

At the time of publishing there have been 124.8 million confirmed cases of Covid-19 globally. The results of factors such as the vaccination roll out, social distancing and lockdowns are becoming evident as infection rates slow in places like the USA, UK and Russia but places like Italy, Germany and India seem to be experiencing an increase in case numbers again.

Daily Global new cases & 7 day average



Vaccine

Currently there are 79 vaccines in clinical evaluation with 23 reaching the final phases of testing in large scale efficacy tests in human candidates. A total of seven vaccines are now available for early or limited use with a further six approved in early or limited use. There are a further 184 potential vaccines in preclinical evaluation.

In the USA, Oxford-AstraZeneca is preparing to apply for emergency authorization from the Food and Drug

Administration following encouraging results stating the shot was "79% effective" and completely prevented the worst outcomes from Covid-19. These results have been subject criticism though citing out dated data resulting an official reduction in the efficacy from AstraZeneca to 76%. The trial showed protection for older people who had not been strongly represented in earlier studies. The vaccine is likely to be available by May in the USA but at that point its likely it won't be needed as the USA is on track to have vaccines supplied to the entire nation's adult population from the three vaccines already authorised.

In the European Union the Oxford-AstraZeneca vaccine was temporarily suspended due to concerns with a handful of recipients experiencing adverse effects related to blood clotting. The suspension could not have come at worse time as Covid cases are increasing in the EU. The vaccination effort using the Oxford-AstraZeneca shot restarted following encouragement from the World Health Organisation and the European Medicines Agency stating that the vaccine was "safe and effective" and that the benefits far out weighted the costs.

Novavax, which New Zealand has an agreement for 10.72 million doses, showed encouraging results with it being 96% effective against Covid-19 and 86% effective against the British strain. Effectiveness was however significantly lower against the South African variant with a 55% effective result.

The Janssen Pharmaceutica (Johnson & Johnson)

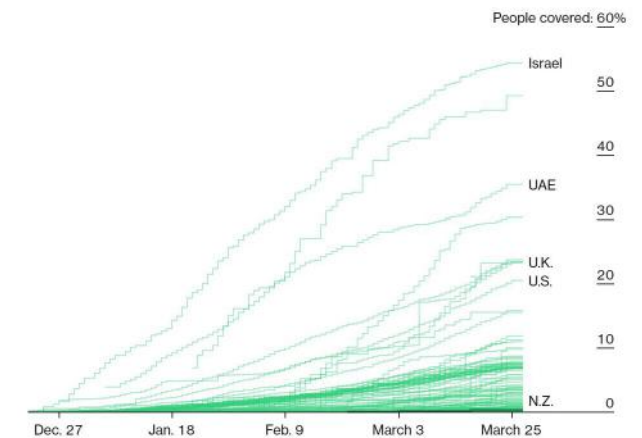
vaccine, which New Zealand has an agreement for 5 million doses for, received emergency use authorisation from the Food & Drug Administration in the USA on the 27 February 2021 with a study finding it 72% effective.

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 492 million doses in 137 countries have been administered, according to data collected by Bloomberg. The latest rate was roughly 12.1 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 administered	Per 100 people
Global Total	492,425,917	-
New Zealand	41,500	0.3
U.S.	133,305,295	20.5
China	85,859,700	3.1
EU	61,104,836	6.9
India	52,197,380	1.9
U.K.	31,186,362	23.3
Brazil	17,477,952	4.2
Turkey	14,131,900	8.5
Germany	11,454,526	6.9
Russia	10,600,000	3.6
Israel	9,830,777	54.3

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

New Zealand's vaccination roll out campaign is entering its second month, a total of approximately 41,500 vaccines have been administered (as of 24 March 2021). Approximately 95% of border and MIQ workers have received their first doses now. Attention now shifts to the wider roll out and the aim is to have 50 vaccination clinics set up by 30 March 2021.

The Government released their confirmed vaccination rollout plan on 10 March which splits New Zealand into four groups. Group 1 is the Border and Managed Isolation and Quarantine (MIQ) workers and their house hold contacts, which are currently being vaccinated. Group 2 is high-risk frontline workers and people living in high-risk places which will begin

from late March. Group 3 is people who are at risk of getting very sick from COVID-19 which will start from mid-May. Group 4 is everyone else over age 16 which will start from July (subject to changes depending on supply). For the full rollout plan click [HERE](#). Currently, only the Pfizer/BioNTech vaccine has been approved for use in New Zealand but applications have been submitted to Medsafe for the from Janssen Pharmaceutica (Johnson & Johnson) and Oxford- AstraZeneca vaccines.

In Australia approximately 332,921 vaccines have been administered (as of 12 March) which is approximately 0.6 .% of their population receiving one dose. They are continuing to target an October 2021 date for having the adult population inoculated. Similar to New Zealand they have a three phase strategy to getting everyone vaccinated. For the Australian full rollout plan details click [HERE](#).

Vaccines & Travel

As the government hinted at the possible introduction of vaccine passports, Air New Zealand has committed to running their own trial with IATA's Travel Pass app. The trial will run for three weeks in April and both customers and crew will be invited to join the trial. The IATA app was decided on due to its international credibility. The first successful trial of the app took place on the 17 March 2021 on a Singapore to London flight and there are now 17 other airlines trialling or planning on trialling the app.

There still appears to be several different options for digital vaccine passport with out one clear globally recognised preference. GlobalData are calling for

one simple app that "that can inform all travellers of the specific entry requirements for a destination, alongside if their current vaccination/test results match". So far there are options from CommonPass, IATA and the European Commission are shortly launching their "Green Certificate" among several other options.

China introduced their government backed digital health vaccine passport on 9 March 2021 which works on Tencent's WeChat messaging app and includes Covid-19 test and vaccination history information

Treatment

Treatment options for people infected with Covid-19 continue to be under development and several encouraging results from studies have been gathered in recent weeks. Regeneron's antibody treatment released findings that use of their treatment sharply reduced hospitalisation or death by 70% in non-hospitalised covid patients, Pfizer have just begun human trials of a covid pill to treat infections at the first sign of illness and a treatment from Vir Biotechnology and GlaxoSmithKline has been encouraged with similar results.

There are currently 24 Covid-19 treatments under development and of those only one treatment (Remdisivir) has approval from the FDA in the USA but a further three, including the Regeneron and GSK treatments mentioned above, are currently applying with FDA for emergency authorisation.

Long term visitation

Visitor Demand Mapping

Updates to timeline

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

This update we have compared the time frame with the Tourism Export Council's Forecasts received on 4 February and 22 March post-Cabinet press conference which discussed trans-Tasman bubble announcement on 6 April (link [HERE](#)) and at this point kept our projections for timelines the same as the last update.

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 modelling. MBIE encourage caution when interpreting results. Please interpret these scenarios with caution.

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

For reference please find links to:

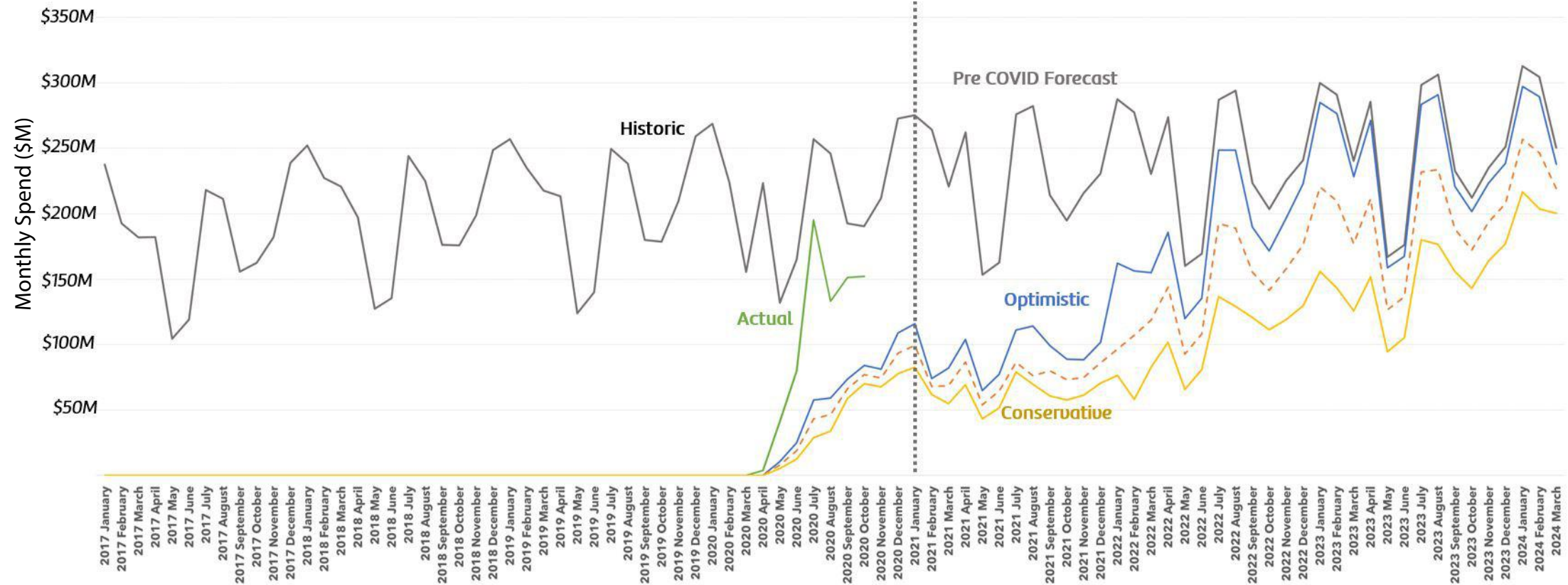
New Zealand Government: [22 March post-Cabinet press conference](#)

Tourism New Zealand (released 17 December, 2020): [December Scenario Modelling](#)

Tourism Export Council [Modelling visual roadmap](#): [Best case forecast](#), [Acceptable forecast](#), [Worst case forecast](#)

Long term visitation

Visitor Demand Mapping



This edition published on Friday 26 March 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)

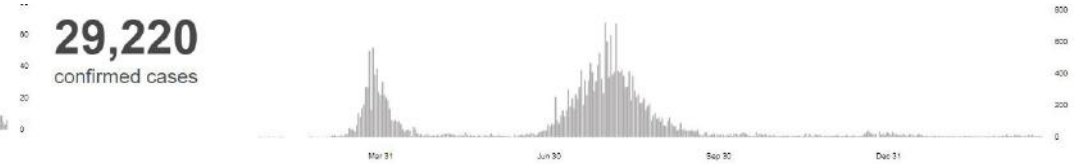
New Zealand

2,120
confirmed cases



Australia

29,220
confirmed cases



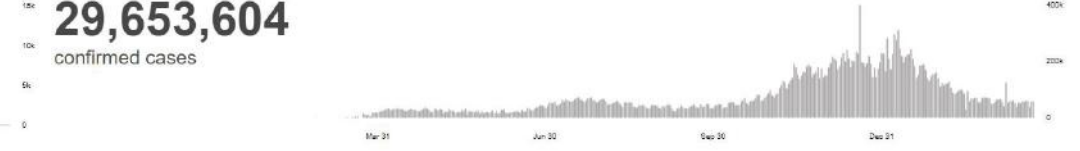
China

102,612
confirmed cases



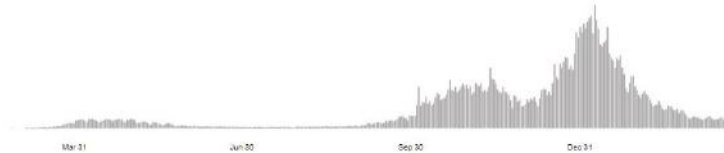
United States

29,653,604
confirmed cases



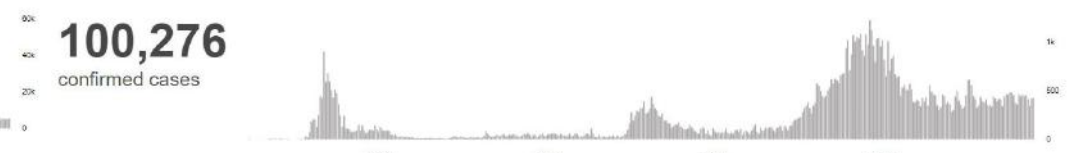
United Kingdom

4,312,912
confirmed cases



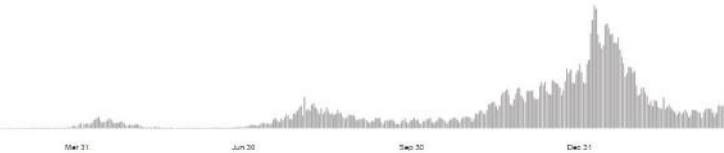
South Korea

100,276
confirmed cases



Japan

460,897
confirmed cases



Germany

2,713,180
confirmed cases

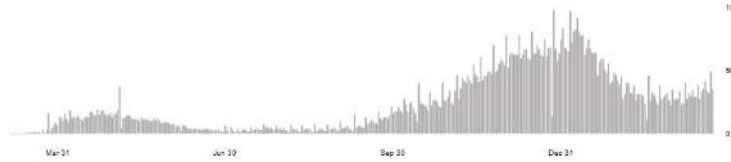


Long term visitation

Visitor Demand Mapping – WHO COVID cases

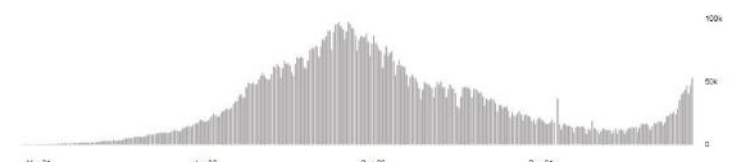
Canada

942,320
confirmed cases



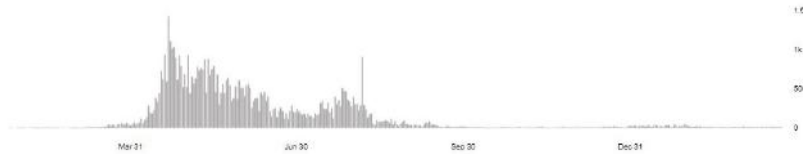
India

11,787,534
confirmed cases



Singapore

60,236
confirmed cases



Global

124,535,520
confirmed cases

