Visitor Demand Mapping
for Queenstown

Short term 30 day forward outlook & long term scenarios
Published Thursday 28 January 2021

Queenstown NEW ZEALAND | HOME OF ADVENTURE

Short term visitation
30 Day Forward Outlook

Overview

Destination Queenstown has developed a 30 day forward out-look chart indicating the current levels of accommodation oc-cupancy in Queenstown. This is based on collated information from multiple data sets covering commercial and non-com-mercial accommodation. The 30 day forward outlook chart is weighted 70% on currently booked forward occupancy rates and 30% 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 accommodation's data toward the dataset please contact kirann@queenstownnz.nz.

Data Sources

DATA SOURCE

STR FORWARD STAR
str

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
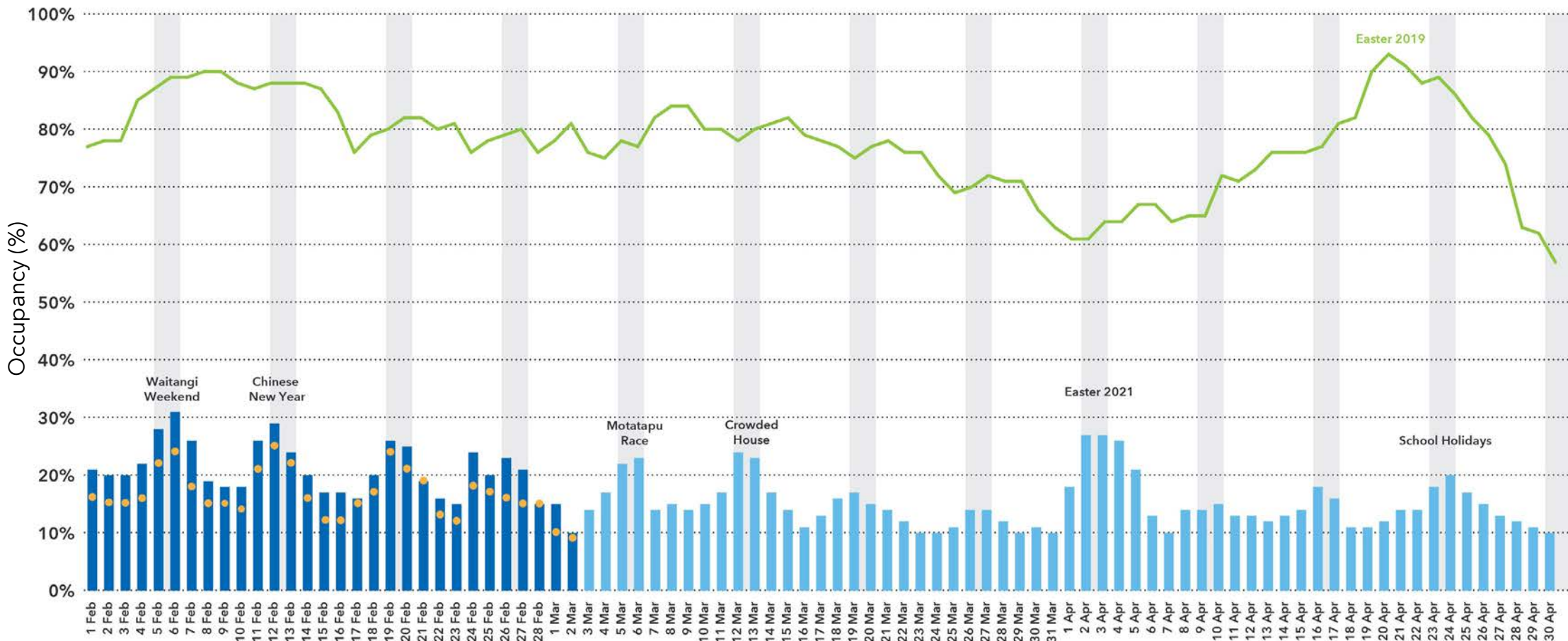AIR NEW ZEALAND

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

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

Chart annotations: Easter 2019, Waitangi Weekend, Chinese New Year, Motatapu Race, Crowded House, Easter 2021, School Holidays. Y-axis: Occupancy (%), 0% to 100%. X-axis dates from 1 Feb to 30 Apr.

This edition published on Thursday 28 January 2021 indicates the current demand (percentage occupancy) for the 30 day period 1 February 2021 to 2 March 2021 (dark blue) plus the following 60 days (light blue). The next update will be on Friday 12 February for the following 30 days (plus 60 days)

Key events have been annotated on the graph and weekends have been distinguished with the pale gray bars. The yellow dots indicate pick up (additional bookings) since the last report was published and this refresh sees the addition of a green line which is the pre-covid historical occupancy rate which is based on recorded occupancy levels in 2019.

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.

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]()

Vaccine

Currently there are 66 vaccines in clinical evaluation with 20 reaching the final phases of testing in human can-didates. Eight vaccines are in early or limited use and a further two have been approved for full use. There are a further 173 potential vaccines in pre-clinical evaluation.

Two vaccine candidates (Moderna and Pfizer) have reached a 95% efficacy rate. Moderna and Pfizer both currently state that their vaccine are still effective against COVID-19 but offer less protection against the South African variant of the virus. Currently Moderna are developing a booster shot against to aid effica-cy against the South African strain. The University of Oxford's efficacy rating is lower at 70% but it jumps up to 90% when a second course is taken. The Ox-ford vaccine however is cheaper and far easier to be distributed so offers huge potential.

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

Vaccine Roll Out

The biggest vaccination campaign in history has begun. More than 68.1 million doses in 56 countries have been administered, according to data collected by Bloomberg. The latest rate was roughly 3.44 million doses a day, on average.

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

Global Vaccination Campaign
Doses administered per 100 people
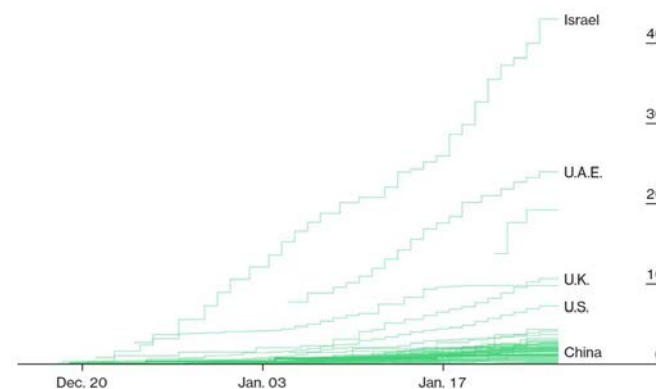
Global Vaccination Campaign
Top 10 countries in vacination progress

Country	Doses given	Per 100 people
Global total	68,153,138	–
U.S.	23,461,494	7.14
China	15,000,000	1.07
EU	8,919,463	2.01
U.K.	7,044,048	10.55
Israel	3,884,418	42.92
U.A.E.	2,571,091	23.92
Germany	1,783,118	2.15
India	1,615,504	0.12
Italy	1,382,893	2.29
Turkey	1,303,036	1.57

The New Zealand Government has ordered enough COVID-19 vaccine doses for every New Zealander and added two vaccine types to its vaccine strategy mix. In total, 15 million vaccine courses have been or-dered to date under four pre-purchase agreements:

- 750,000 courses from Pfizer/BioNTech
- 5 million courses from Janssen
- 3.8 million courses from the University of Oxford/ AstraZeneca
- 5.36 million courses from Novavax

The New Zealand Government announced following a Cabinet meeting on 26 January that they expect Med-safe to give official regulatory approval for the Pfizer/BioNTech vaccine next week. This vaccine will be given to front line workers and their household contacts. They don't expect mass immunization to begin until mid year.

For full details of New Zealand's COVID-19 Vaccine planning click HERE

Australia's vaccine roll out is planned to start from February 2021. The first groups will be front line workers and elderly/ aged care workers. Australia has contracts in place for several vaccines including the Pfizer-BioNTech mRNA vaccine (10 million doses - enough for 5 million people) and the the AstraZen-eca/Oxford vaccine which will be produced locally in Australia by CSL which has a contract for 54 million.

Australia is aiming to have the full population vaccinated by October 2020.

Long term visitation
Visitor Demand Mapping

Vaccines & Travel

Following indications by lawmakers and at least one airline that vaccination against the coronavirus could become a requirement for international travel, the World Travel and Tourism Council (WTTC) said mandating inoculations would be discriminatory. "We should never require the vaccination to travel," WTTC chief executive Gloria Guevara said "If you require the vaccination before travel, that takes us to discrimination."

The International Air Transport Association (IATA) has also been calling for a global testing strategy to replace quarantines and restart travel now.

Closer to home Prime Minister Jacinda Arden stated in her latest post Cabinet press conference: " For travel to restart we need one of two things: we either need the confidence that being vaccinated means you don't pass COVID-19 on to others, and we don't know that yet, or we need enough of our population to be vaccinated and protected that people can safely re-enter New Zealand. Both possibilities will take some time. In the meantime, we will continue to pursue travel bubbles with Australia and the Pacific, but the rest of the world simply poses too great a risk to our health and our economy to take the risk at this stage.

Treatment

Two more life-saving drugs have been found that can cut deaths by a quarter in patients who are sickest with Covid.

The anti-inflammatory medications, given via a drip, save an extra life for every 12 treated, say researchers who have carried out a trial in NHS intensive care units. The UK government is working closely with the manufacturer, to ensure the drugs - Tocilizumab and Sarilumab - continue to be available to UK patients. As well as saving more lives, the treatments speed up patients' recovery and reduce the length of time that critically-ill patients need to spend in intensive care by about a week.

Tests

A rapid, over-the-counter COVID-19 test developed in Brisbane has been approved for use in the United States.

The antigen test, designed by Ellume, is the first of its kind to be granted emergency use authorisation from the US Food and Drug Administration. Ellume's COVID-19 home test delivers the important first line of defense – it can be widely available without the need for a prescription, enabling the US to respond to the pandemic in its most urgent stage. Ellume plans to manufacture and deliver in excess of 20 million Ellume COVID-19 tests within the first half of 2021.

Long term visitation
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Updates to scenarios

Several sources have been utilised and compared including the Tourism Export Council, Tourism New Zealand's forecasts and the 26 January New Zealand Government post Cabinet press conference (read the full transcript HERE) to develop the opposite time line expectations.

Inline with these sources we have altered our timelines to change Trans-Tasman Australia to start in April 2021 (optimistic). Also we have consolidated the three sets within horizon three to now be all long haul markets and moved the restart dates to January 2022 (optimistic) and March 2022 (conservative) in line with TNZ and TEC's expectations.

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.

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:

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
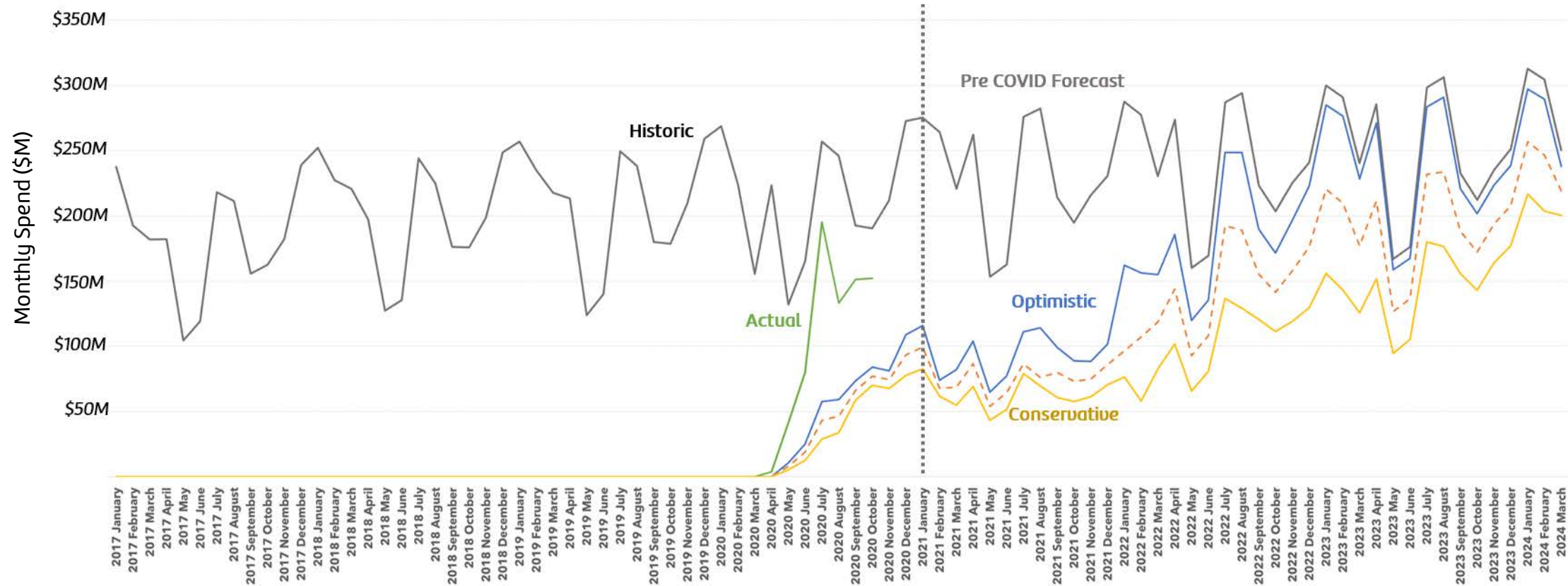
This edition published on Thursday 28 January 2021 indicates range of potential scenarios for a return to spending (domestic and interna-tional) / level of demand in Queenstown up until March 2024

The recovery spend graph represents three different scenarios for a recover of domestic and international tourism spend in Queenstown. The gray line is the pre-covid forecast based on MBIE's Tourism Forecasts (2019 -2025) and a green line which illustrates actual MRTE's.

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Long term visitation

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	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%
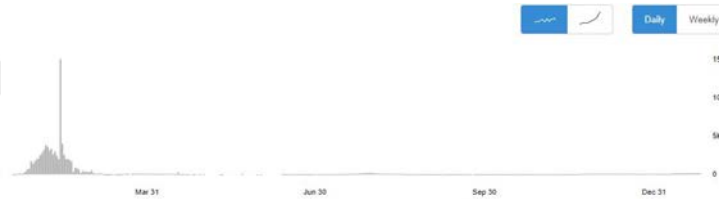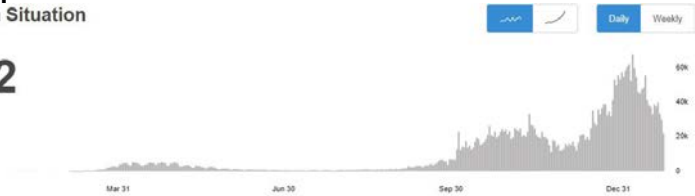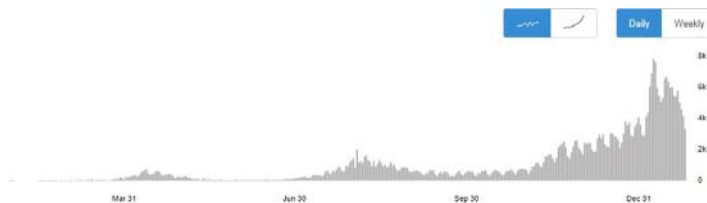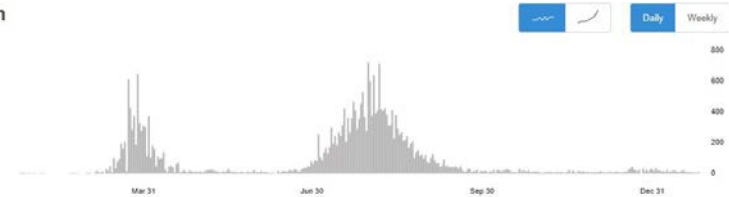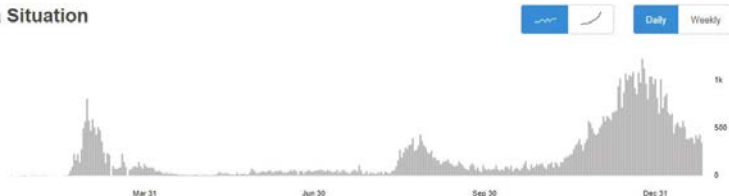
Long term visitation
Visitor Demand Mapping – COVID cases
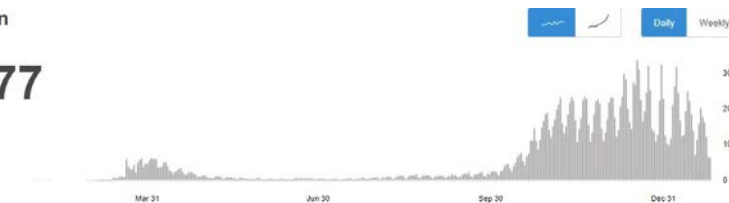
Long term visitation
Visitor Demand Mapping – COVID cases

Canada

Canada Situation

747,383
confirmed cases

India
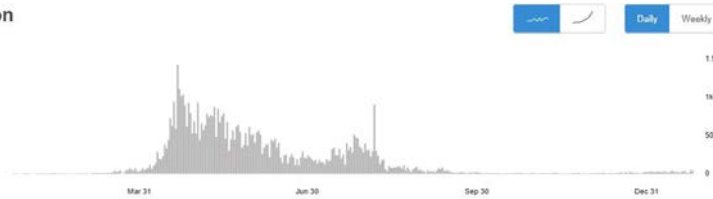
India Situation

10,676,838
confirmed cases
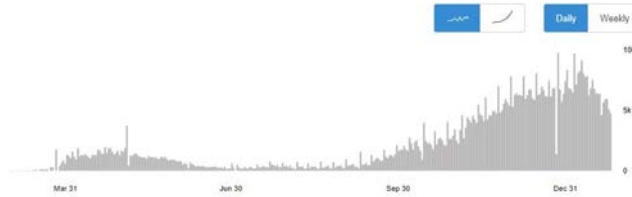
Singapore

Singapore Situation

59,352
confirmed cases
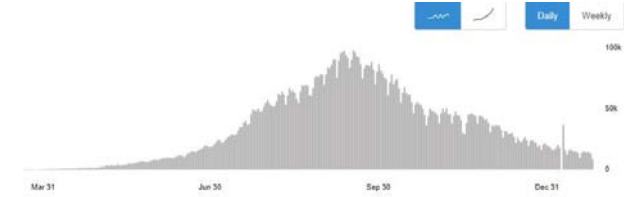
Global

99,363,697
confirmed cases