

# Visitor Demand Mapping for Queenstown

Short term 90 day forward outlook & long term scenarios  
*Published on Friday 30 April 2021*

# Short term visitation

## 90 Day Forward Outlook

### Overview

Destination Queenstown has developed a 90 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 90 day forward outlook chart is weighted 80% on currently booked forward occupancy rates and 20% on predictive forward booking data.

The objective of this 90 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 90 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 Nambiar.

### 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

QUEENSTOWN  
INTERNATIONAL AIRPORT



#### INFORMATION

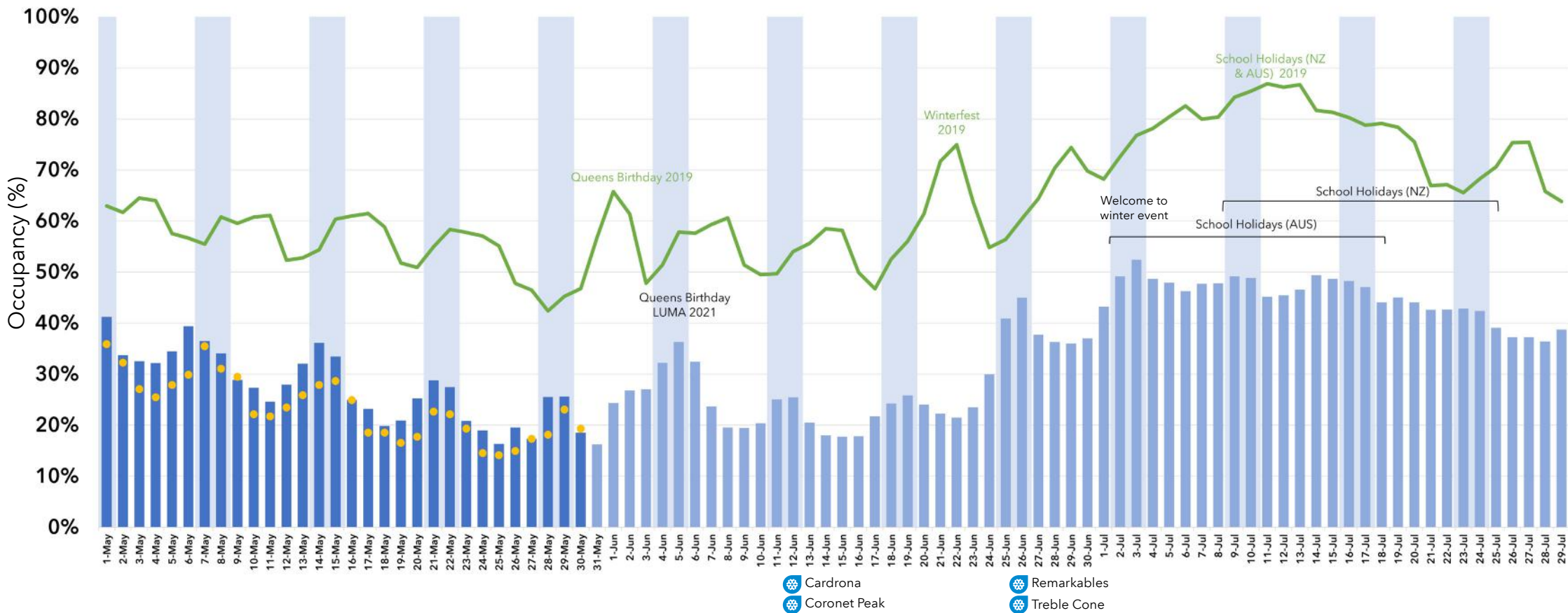


Market intelligence capturing booking intent in real time. Takes into account OTA, GDS, alternative lodgings. Gives a "heat" map.

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

# Short term visitation 90 Day Forward Outlook

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



This edition published on Friday 30 April 2021 indicates the current demand for the 30 day period 1 May 2021 to 30 May 2021 (plus the following 60 days). The next update will be on Friday 7 May 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

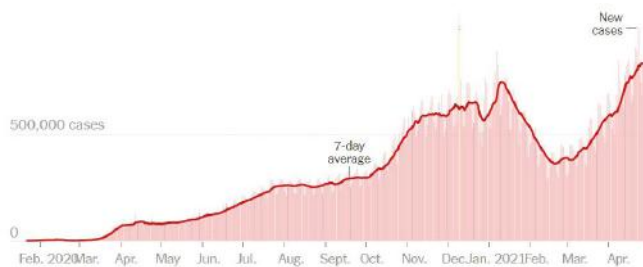
This is an update to the Visitor Demand Mapping for Queenstown-Lakes (2020 to 2024) report published on Thursday, May 14, 2020. You can view the full version of the earlier report [here](#). For further feedback, more information or clarifications about the content below please contact Kiran Nambiar.

### Covid-19 Situation

At the time of publishing, there have been 148.3 million confirmed cases of Covid-19 globally. As different variants emerge, different countries are experiencing some of the worst peaks of their outbreaks to date.

The split of vaccinated vs non vaccinated populations is becoming evident with countries such as America, England and Canada experiencing lower infection rates and lower death rates compared to other countries like India, Brazil, Iran and Paraguay. India for example, set a new global daily case record with 349,641 confirmed infections in just one day on Sunday 25 April.

### Daily Global new cases & 7 day average



### Vaccine

Currently there are 91 vaccines in clinical evaluation with 27 reaching the final phases of testing in large scale efficacy tests in human candidates. A total of eight vaccines are now available for early or limited use with a further five approved in early or limited use. There are a further 184 potential vaccines in pre-clinical evaluation.

For further information about vaccine development and approvals check out the New York Times Coronavirus Vaccine Tracker by clicking [HERE](#).

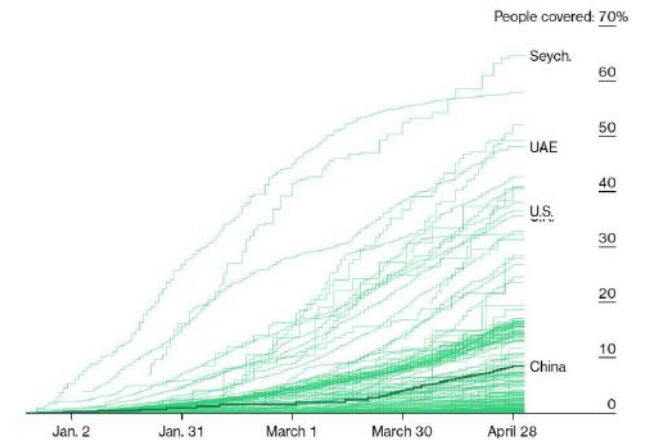
New Zealand has agreements in place with four suppliers for vaccines. The vaccines are Pfizer (10 million doses, approved by Medsafe), Janssen Pharmaceutica (5 million doses), Novavax (10.72 million doses) and AstraZeneca (3.8 million doses). For further information about each of the vaccines that New Zealand will have access to, click [HERE](#).

### Vaccine Roll Out

At the time of publishing, 1.08 billion doses in 172 countries have been administered, according to data collected by Bloomberg. The latest global vaccination rate was roughly 20.3 million doses a day on average.

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

### Global Vaccination Campaign Doses administered per 100 people



### Global Vaccination Campaign Top 10 countries in vaccination progress

Country	Doses administered	Enough for % of people
Global Total	1,081,712,912	-
New Zealand	232,588	2.4
China	235,976,000	8.4
U.S.	234,639,414	36.5
India	149,877,121	5.5
EU	137,936,598	15.5
U.K.	47,540,984	35.6
Brazil	45,109,545	10.7
Germany	26,634,961	16
Turkey	22,312,583	13.4
France	20,936,911	16.1
Russia	19,800,000	6.7

# Long term visitation

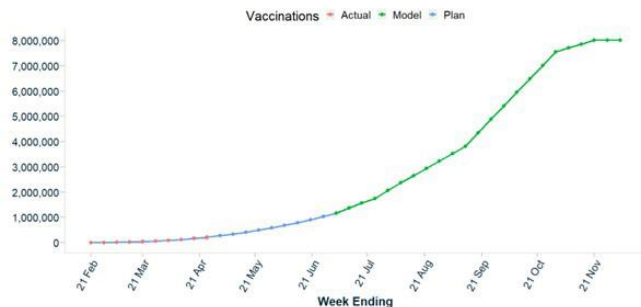
## Visitor Demand Mapping

### New Zealand Roll Out

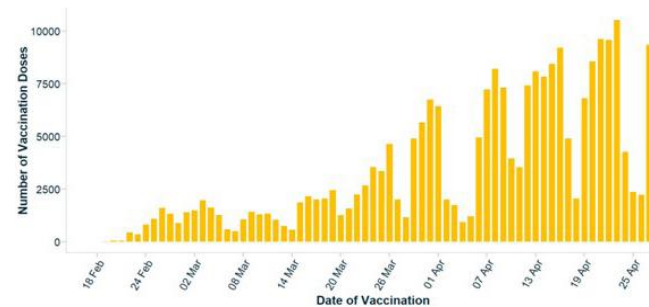
As New Zealand enters its third month of vaccine roll out, 172,564 first doses have been administered with a further 60,024 second doses administered taking New Zealand's total dose number to 232,588 as of 27 April 2021. The pace of vaccination is gradually increasing with 49,237 doses being administered in the seven days prior to 27 April 2021 as the second group of people (high risk frontline workers and people living in high risk places) are receiving vaccinations. Depending on vaccine supply, group three (people who are at risk of getting very sick from COVID-19) is expected to receive vaccinations in late May followed by group four (general population) in July (time frames dependent on vaccination supply).

The Ministry of Health is expecting 8,000,000 doses to have been administered by end of November 2021. Currently the major constraint is physically getting the vaccines to New Zealand - the bulk of the Pfizer vaccine is expected in the country in the later half of 2021. For further details about the progress of New Zealand's vaccine roll out, click [HERE](#).

### NZ Cumulative planned and projected doses



### NZ Doses Administered by Day



### Australia Roll Out

Australia is in a similar situation to New Zealand with vaccine supply constraints and slower than expected roll outs. So far there have been 1.97 million doses delivered - approximately enough to cover 3.9% of their total population.

The Australian Government has secured a total of 170 million doses. Their roll out strategy has been affected by supply issues and vaccine nationalism due to the European Union barring delivery of over 3 million Pfizer vaccines from Italy. The Australian roll out strategy is also heavily based and reliant on the locally made AstraZeneca vaccine; however the Health Ministry has officially advised Australians over 50 not to have this vaccine. The roll out is likely to be a key focus, particularly due to the fact that 2021 is election year.

### Vaccines & Travel

Vaccination rates are increasing globally - albeit at a highly inconsistent rate in different countries - but there continues to be a lack of consistency around the implementation of travel passports. Because of this, it is becoming apparent that reaching some form of travel as we once knew may be a long way off yet.

In an effort to curb potential outbreaks at the New Zealand border, a new "very high risk" country category has been created which applies further restrictions on travel from certain countries. Currently the countries in this category are: India, Brazil, Pakistan, and Papua New Guinea.

The USA's national public health agency, The Centers for Disease Control and Prevention (CDC), has updated its travel recommendations saying both domestic and international travel is low risk for fully vaccinated Americans but travellers must continue to take precautions like mask wearing. US officials are still urging Americans not to travel unless they absolutely must.

# Long term visitation

## Visitor Demand Mapping

### Updates to timeline

Several sources have been checked and compared in order to develop the timeline expectations. For this update, we have moved forward the start date for the Australian horizon to April - inline with the announcement made on 6 April and the border opening 19 April 2021.

We have kept our assumptions conservative for the first few months prior to ski season as Tourism New Zealand and the Government have suggested that majority of travel will likely be for those visiting friends and relatives. Winter is shaping up to be a different story with Air New Zealand stating that "Queenstown will see an influx of Aussies in July and September" and its expected there will be pent up demand for travel from our Australian neighbours.

In this update, we have also compared the time frames and recovery projections with Tourism New Zealand's scenario modelling, the Tourism Export Council's Forecasts and 6 April post-Cabinet press conference (link [HERE](#)). As mentioned, the Australia market is now open but the Long Haul Markets time frames have remained the same.

### Timeline

MARKETS	CONSERVATIVE	MID	OPTIMISTIC
<b>HORIZON 1</b>			
Regional Market, New Zealand Domestic Market	OPEN	OPEN	OPEN
<b>HORIZON 2</b>			
Trans-Tasman Australia	OPEN	OPEN	OPEN
<b>HORIZON 3</b>			
Long Haul Markets	MAR 2022	FEB 2022	JAN 2022

### For reference please find links to:

New Zealand Government: [6 April post-Cabinet press conference](#)

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

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

# 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%	2%	0%	40%	100%	2%	0%	33%	80%	1%	0%	27%
2021 May	120%	15%	0%	44%	100%	13%	0%	37%	80%	10%	0%	30%
2021 June	120%	50%	0%	58%	100%	33%	0%	46%	80%	15%	0%	35%
2021 July	95%	70%	0%	56%	88%	45%	0%	45%	80%	20%	0%	35%
2021 August	95%	70%	0%	49%	88%	45%	0%	40%	80%	20%	0%	30%
2021 September	95%	70%	0%	51%	88%	45%	0%	42%	80%	20%	0%	33%
2021 October	95%	70%	0%	50%	88%	55%	0%	44%	80%	40%	0%	38%
2021 November	95%	70%	0%	43%	88%	55%	0%	38%	80%	40%	0%	33%
2021 December	95%	70%	0%	46%	88%	55%	0%	41%	80%	40%	0%	35%
2022 January	95%	70%	30%	56%	88%	55%	0%	36%	80%	40%	0%	31%
2022 February	95%	80%	40%	58%	88%	60%	20%	40%	80%	40%	0%	23%
2022 March	95%	90%	50%	71%	88%	65%	33%	55%	80%	40%	15%	39%
2022 April	95%	95%	50%	72%	88%	68%	33%	56%	80%	40%	15%	40%
2022 May	95%	95%	60%	77%	88%	68%	38%	59%	80%	40%	15%	41%
2022 June	95%	95%	60%	81%	88%	68%	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%	78%	55%	72%	80%	60%	40%	59%
2022 November	95%	95%	80%	87%	88%	78%	60%	72%	80%	60%	40%	56%
2022 December	95%	95%	90%	93%	88%	78%	65%	75%	80%	60%	40%	57%
2023 January	95%	95%	95%	95%	88%	78%	68%	75%	80%	60%	40%	55%
2023 February	95%	95%	95%	95%	88%	78%	68%	73%	80%	60%	40%	52%
2023 March	95%	95%	95%	95%	88%	78%	68%	75%	80%	60%	40%	56%
2023 April	95%	95%	95%	95%	88%	88%	68%	77%	80%	80%	40%	59%
2023 May	95%	95%	95%	95%	88%	88%	68%	77%	80%	80%	40%	59%
2023 June	95%	95%	95%	95%	88%	88%	68%	79%	80%	80%	40%	64%
2023 July	95%	95%	95%	95%	88%	88%	68%	81%	80%	80%	40%	66%
2023 August	95%	95%	95%	95%	88%	88%	68%	79%	80%	80%	40%	63%
2023 September	95%	95%	95%	95%	88%	88%	78%	83%	80%	80%	60%	72%
2023 October	95%	95%	95%	95%	88%	88%	78%	83%	80%	80%	60%	71%
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%

### Note regarding MRTE's

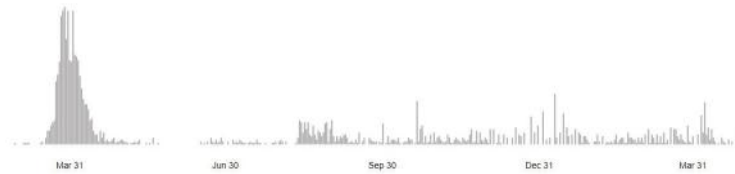
Please note that we have used the Monthly Regional Tourism Estimates as the measure for these scenarios. MBIE have acknowledged that there have been significant changes within the tourism industry which has impacted the underlying assumptions within their modelling. MBIE encourage caution when interpreting results. Please interpret these scenarios with caution.

# Long term visitation

## Visitor Demand Mapping – COVID cases (WHO)

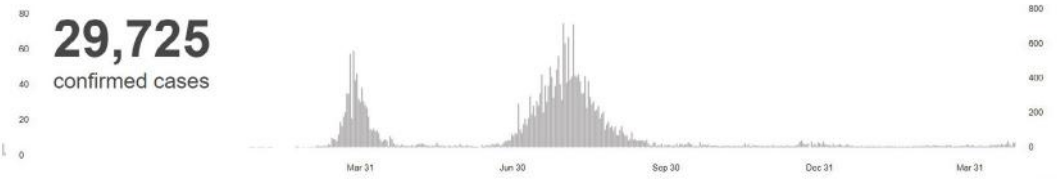
### New Zealand

**2,254**  
confirmed cases



### Australia

**29,725**  
confirmed cases



### China

**103,529**  
confirmed cases



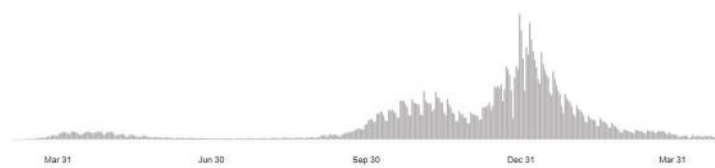
### United States

**31,783,375**  
confirmed cases



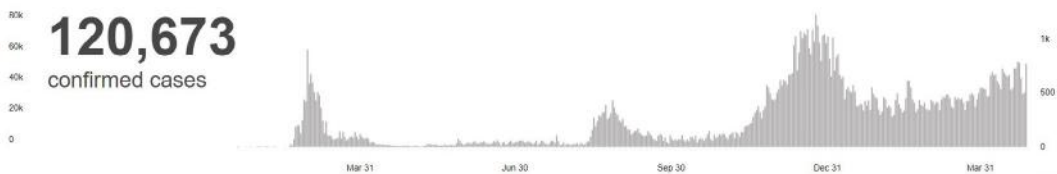
### United Kingdom

**4,409,635**  
confirmed cases



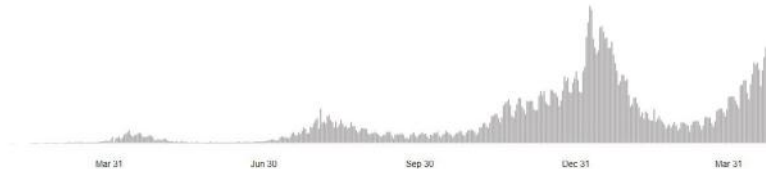
### South Korea

**120,673**  
confirmed cases



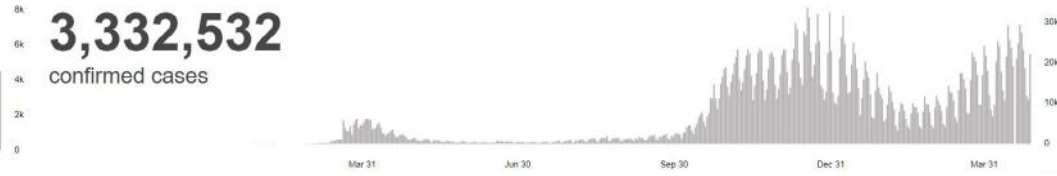
### Japan

**575,563**  
confirmed cases



### Germany

**3,332,532**  
confirmed cases





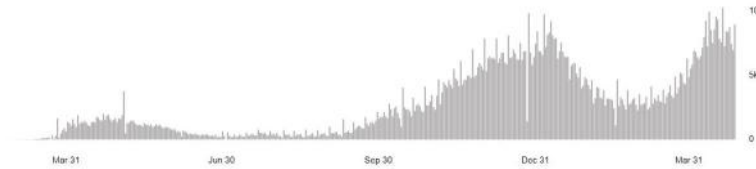
# Long term visitation

## Visitor Demand Mapping – WHO COVID cases

### Canada

**1,187,918**

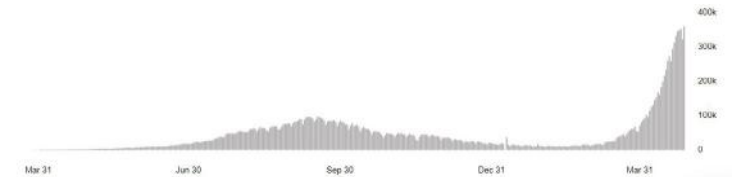
confirmed cases



### India

**17,997,267**

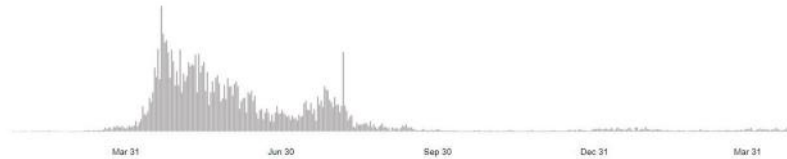
confirmed cases



### Singapore

**61,063**

confirmed cases



### Global

**148,329,348**

confirmed cases

