



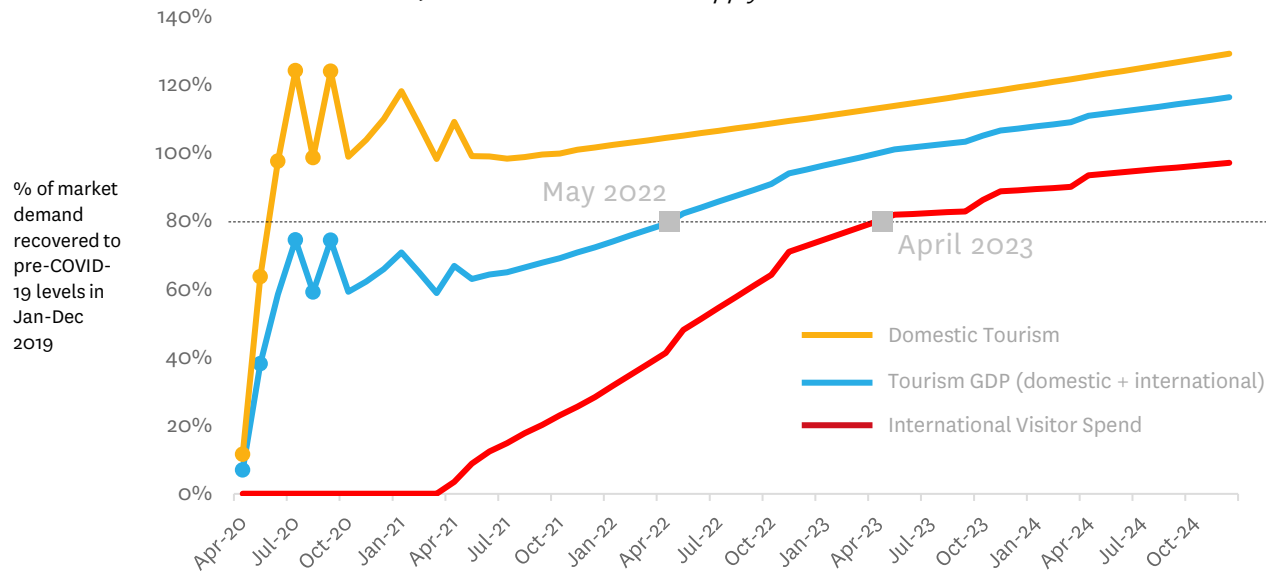
# Tourism New Zealand Scenario Models

December 2020

# Scenario – updated December 2020

Scenario - updated December 2020

*Note: This is a demand-based model, assumes unconstrained supply*



*Results for April – September 2020 based on Monthly Regional Tourism Estimates*

## Scenario Assumptions

April 2021 reflects the first full month of a Trans Tasman border opening

Rest of borders: Jan 2022

By December 2024

Total Tourism expenditure would be at +16% of 2019 levels

Visitor volumes will still be below those seen during 2019



**100% PURE  
NEW ZEALAND**

# Scenario Inputs and Outputs – December 2020

% of market demand recovered to pre-COVID-19 levels

Results available:  X %

Travel resumes/Borders open:  X %

Reach 80% recovery:  X %

Scenario - updated December 2020

		2020									2021									2022					
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
INPUTS	NZ Domestic	12%	64%	98%	124%	99%	124%	99%	104%	110%	118%	108%	98%	109%	99%	99%	98%	99%	100%	100%	101%	102%	102%	103%	104%
	Australia	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	10%	25%	35%	42%	50%	57%	65%	72%	80%	80%	80%	80%
	Rest of World	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	5%	10%	15%
	International	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%	9%	12%	15%	18%	20%	23%	26%	28%	32%	35%	38%
	Tourism GDP*	7%	38%	59%	75%	59%	74%	59%	62%	66%	71%	65%	59%	67%	63%	64%	65%	66%	68%	69%	71%	72%	74%	76%	78%
		2022									2023									2024					
		Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar
OUTPUTS	NZ Domestic	104%	105%	106%	107%	107%	108%	109%	109%	110%	111%	112%	112%	113%	114%	115%	115%	116%	117%	118%	119%	119%	120%	121%	122%
	Australia	80%	90%	90%	90%	90%	90%	90%	100%	101%	101%	102%	103%	103%	104%	105%	105%	106%	107%	108%	108%	109%	110%	110%	111%
	Rest of World	20%	25%	30%	35%	40%	45%	50%	55%	58%	60%	62%	65%	67%	70%	70%	70%	70%	70%	75%	78%	78%	78%	78%	78%
	International	41%	48%	51%	55%	58%	61%	64%	71%	73%	75%	76%	78%	80%	82%	82%	82%	83%	83%	86%	89%	89%	89%	90%	90%
	Tourism GDP*	79%	82%	84%	86%	87%	89%	91%	94%	95%	96%	98%	99%	100%	101%	102%	102%	103%	103%	105%	107%	107%	108%	108%	109%

Domestic Results for April - September 2020 based on Monthly Regional Tourism Estimates

\*Tourism GDP = Domestic + International spend