



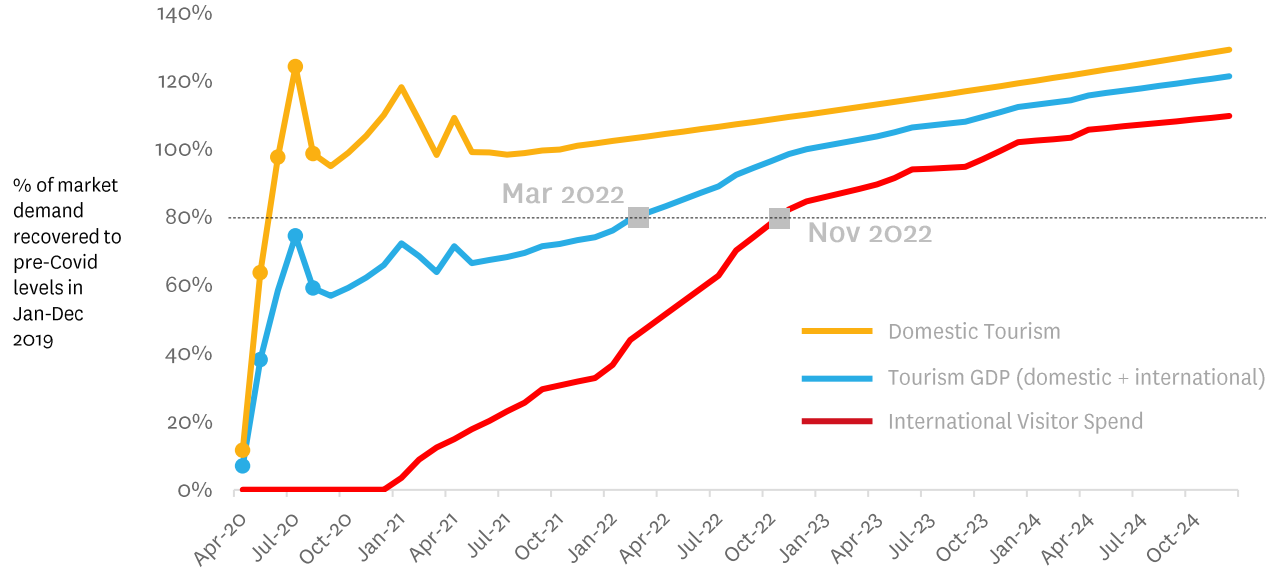
TNZ Scenario Models

October 2020

Scenario – updated October 2020

Scenario - updated October 2020

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



Results for April - August 2020 based on Monthly Regional Tourism Estimates

Scenario Assumptions

Trans Tasman border: Jan 2021

Rest of borders: Jan 2022*

With the opportunity of smaller destinations phased in during 2021

Scenario Inputs and Outputs – October 2020

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

Results available: X %

Travel resumes/Borders open: X %

Reach 80% recovery: X %

Scenario - updated October 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%	95%	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%	10%	25%	35%	42%	50%	57%	65%	72%	80%	80%	80%	80%	80%	90%	90%			
	Rest of World	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	1%	1%	1%	2%	2%	2%	3%	5%	7%	14%	19%	24%			
	International	0%	0%	0%	0%	0%	0%	0%	0%	0%	4%	9%	12%	15%	18%	20%	23%	26%	30%	31%	32%	33%	37%	44%	48%			
	Tourism GDP (Dom + Int)	7%	38%	59%	75%	59%	57%	59%	62%	66%	72%	69%	64%	71%	67%	68%	68%	70%	72%	72%	73%	74%	76%	79%	81%			
		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	90%	90%	90%	90%	100%	101%	101%	102%	103%	103%	104%	105%	105%	106%	107%	108%	108%	109%	110%	110%	111%	112%	113%	113%			
	Rest of World	30%	36%	42%	48%	54%	60%	66%	71%	75%	76%	78%	79%	81%	83%	87%	87%	87%	87%	90%	93%	97%	97%	98%	98%			
	International	52%	55%	59%	63%	70%	74%	78%	82%	85%	86%	87%	88%	90%	92%	94%	94%	95%	95%	97%	100%	102%	102%	103%	103%			
	Tourism GDP (Dom + Int)	83%	85%	87%	89%	92%	94%	97%	99%	100%	101%	102%	103%	104%	105%	106%	107%	108%	108%	109%	111%	112%	113%	114%	114%			

Results for April - August 2020 based on Monthly Regional Tourism Estimates