03. Scope

05. The current situation

17. By country: status and recovery focus

33. Emerging themes and initial considerations
SCOPE AND PURPOSE

Covid 19 impact on pacific tourism

The purpose of this report is to provide high level analysis of the initial impact and of Covid-19 on Pacific tourism, and early responses.

The report is designed to be an aid to decision-making by Pacific tourism sector organisations and businesses, to raise issues, to inform thinking, and to highlight future themes around Pacific regional cooperation for tourism’s recovery from COVID-19.

Stage 1 in a 3 phase process

This report is phase 1B of 3 phases:

- Overall pacific and by country situation and initial response summary
- High level recovery pathway options are outlined. Later, more detailed work on recovery themes and options will follow in phase 2 and 3

Focus countries

- Cook Islands
- Niue
- Tonga
- Samoa
- Solomon Islands
- Vanuatu
- Fiji

Process

Consultation: Wide consultation with Pacific tourism sector leaders has been undertaken and support and cooperation from SPTO and Pacific NTOs have enabled the consolidation of pacific wide analysis. Aviation sector expertise has also provided input and insight. New Zealand based tourism sector response has also been reviewed.

Interviews conducted via skype

World wide tourism response review:

The analysis has also been informed by global tourism sector intelligence and input.
THIS REPORT IS THE OUTPUT OF STAGE 1A OF THE COVID 19 IMPACT ASSESSMENT AND SUPPORT PROGRAMME OPTIONS

SCOPE: Information required

Phase 1 situation analysis
To identify the impact of Covid 19 on the tourism sectors of the focus countries: Cook Islands, Tonga, Niue, Samoa, Solomon Islands and Vanuatu – based on a pre-virus baseline assessment and the immediate and projected evolving situation.

Understand the tourism sector overall and by sub sector category (accommodation, transport, activities and experiences) and then extended to include an overview of secondary downstream impacts and implications for associated sectors (including but not limited to food service, agriculture, retail).

Phase 1A Tourism sector quick scan
- Assess immediate impact of the COVID-19 situation: what is happening now?
- An immediate situation analysis and estimate of impact by country, sector within country
- Identify immediate/critical key risks, key immediate needs and opportunity to mitigate risk.
- Identify prioritised opportunity and focus to enable future sector recovery.

Phase 1B Tourism sector status analysis
- Develop a more thorough understanding of the situation, risks, needs through primary (talking to key people in each market and the region) and secondary data collection (tourism and economic data).
- High level overview of tourism pre-COVID-19 contribution to national economies and the current and estimated impact.
- Understand in more depth risk, mitigation and stimulation opportunity. This will then enable the development of informed scenarios to be developed and engage key regional and in-country stakeholders.

Phase 2 Scenario development
To identify a set of possible tourism economic impact scenarios in selected Pacific destinations as a result of Covid-19-related travel pattern changes.

- Immediate: a short-term impact and response phase
  - Scenario 1: Significant: Mid-term impact and significant recovery period.
  - Scenario 2: Severe: Long-term impact
  - Scenario 3: Major: a severe, major economic downturn and an extended period before recovery.

Phase 3 Recovery pathways
Identify immediate needs and alternative support options for the mid and longer term that will facilitate sector, economic and social recovery

- What support options are there to retain tourism sector capability, employment, infrastructure and underpin business and sector readiness to rebuild and enable reactivation.
- What support options within and outside the tourism sector might be practical, across whole of government activity, financial institution support, and in downstream subsectors and supply chains.

Pacific country focus:
- Cook Islands
- Niue
- Tonga
- Samoa
- Solomon Islands
- Vanuatu
- Fiji

We are here
Initial high level status report. Note that all interviews have not been completed at this stage.
The current situation.

“COVID-19 has impacted travel and tourism like no other event before in history”
UNWTO Secretary-General Zurab Pololikashvili
STATUS & RISK MATRIX OF THE TOURISM SECTOR OF PACIFIC ISLAND COUNTRIES

THE SITUATION

Global: 96% of all world destinations have travel restrictions. As of 6 April 2020
• No restrictions have been lifted globally at this stage

Pacific tourism: At this time, all tourism in the pacific has ceased.
• All borders to pacific countries including New Zealand are closed to commercial air traffic and cruise ships. There are currently no commercial air services, and global tourism has halted. Flights are operating on a charter basis only.

Covid status in the pacific
• Currently there are no cases of Covid 19 in Cook Islands, Niue, Vanuatu, Tonga, Samoa, Solomon Islands, Tuvalu. There are confirmed covid 19 cases in: Fiji, French Polynesia, New Caledonia and PNG

THE IMPACT
• Impact on all pacific nations is significant, with the tourism sector and all associated businesses and sectors effectively shut down commercially and in maintenance mode at best.
• Of the target countries the Cook Islands is particularly vulnerable as tourism accounts or 87% of GDP. For Niue and Vanuatu tourism accounts for over 40% of GDP.

IMPACT MATRIX

vertical axis: Impact on ECONOMY: based on tourism contribution to the local economy in terms of the share of the contribution of tourism to GDP
• horizontal axis: Impact on EMPLOYMENT: based on share of tourism-related jobs within total employment
• size of the bubble: Size of the TOURISM sector: based on annual total tourist spending

➔ At HIGHEST RISK: TOP RIGHT = economies highly reliant on tourism with a high percentage of employment and GDP associated to the tourism industry.
➔ At LOWEST RISK: BOTTOM LEFT = economies that rely on other export industries for most of their GDP and employment.

FORWARD

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank, Reserve Bank of Fiji //note these figures include vfr and tourist arrivals
PACIFIC TOURISM: REGIONAL STATUS AND EMERGING THEMES

SITUATION

• Severe and substantial impact in all countries with immediate closure of the sector as international borders closed from the beginning of April 2020
• Significant unemployment in direct and related sectors
• Immediate and projected financial tourism business challenges with no income and ongoing costs – All business impacted, some failing immediately
• Sector resilience varies from country to country but all are vulnerable
• Air connectivity, local and international, is a key sector risk for all pacific countries with local and international airlines and pacific routes not financially viable

Most countries have established crisis response packages, however many do not include wage support and the ability to support these initiatives over time is limited. Overall financial support is limited and may not be sustainable for an extended period.

Tourism sector resilience and response is variable by market. There is a key opportunity to enable cross pacific recovery cooperation, sharing and initiatives to elevate total pacific destination capability, impact and build a stronger future sector sustainability and resilience.

COMMON RISKS

• Loss of skills and capability – at all levels and particularly in skilled management and operations
• Loss of core successful tourism sector businesses – accommodation, experiences and transport
• Loss of critical mass in the sector overall to enable responsive recovery
• Potential loss of local ownership and control of core tourism infrastructure
• Impact on the wider economy, community and society

IMMEDIATE NEEDS

• Wage support to minimise skills losses and enable core staff to be retained
• Financial micro grants – contestable to enable targeted support of core high performing businesses to enable them to survive. This will shore up businesses and get them ‘loan ready’ if required, to support longer term recovery.
• Review taxes, charges and levies to reduce ongoing costs where possible
• Training programmes – to upskill and enable the sector to improve capability to respond to the recovery – particularly focused around digital capability
• Scenario planning to better inform response options and enable more effective and timely response and pivoting to respond to changing demand. This is also important to manage expectations and recovery planning focus and invest realistically
IMPACT BY COUNTRY

The potential direct financial impact due to loss of visitor income across the 7 target countries over a 12 month period is in excess of NZ$3.1 billion. *(if no tourism over 12 months – data covers tourists and VFR visiting friends and relatives)*

<table>
<thead>
<tr>
<th>Country</th>
<th>Visitor arrivals</th>
<th>Employment</th>
<th>Visitor spend</th>
<th>Preparedness</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook Islands</td>
<td>166,934</td>
<td>2,386</td>
<td>$421,617,500</td>
<td>Very well organised, infrastructure is strong following substantial investment through the NZ economic stimulus package, economic support in place for at least 3 months</td>
</tr>
<tr>
<td>Niue</td>
<td>10,448</td>
<td>226</td>
<td>$11,700,000</td>
<td>Very strong tourism status analysis and planning. A core group of successful operators – with some flexibility however only one large hotel</td>
</tr>
<tr>
<td>Tonga</td>
<td>58,783</td>
<td>7,100</td>
<td>$156,650,000</td>
<td>Cyclone Harold has severely damaged infrastructure in some regions. This combined with covid 19 is a significant challenge</td>
</tr>
<tr>
<td>Samoa</td>
<td>181,473</td>
<td>5,158</td>
<td>$413,300,000</td>
<td>The Samoan tourism sector already significantly impacted by the Measles epidemic and associated border closures. Revenue &amp; associated business &amp; employment challenges has been happening for over 7 months prior covid 19</td>
</tr>
<tr>
<td>Solomon Islands</td>
<td>25,700</td>
<td>6,400</td>
<td>$135,000,000</td>
<td>An emergent tourism sector is highly venerable to any tourism contraction. Marginal financial viability with average 40% pre covid occupancy. Even successful operators are highly exposed</td>
</tr>
<tr>
<td>Vanuatu</td>
<td>97,182</td>
<td>15,000</td>
<td>$468,280,000</td>
<td>Very strong planning and strategy based on strong information and research. Damage in cyclone Harold is an additional challenge to infrastructure</td>
</tr>
<tr>
<td>Fiji</td>
<td>894,389</td>
<td>41,338</td>
<td>$1,551,500,000</td>
<td>Strong sector with a strong local capability. A strong core of very capable operators. Cyclone Harold has damaged infrastructure</td>
</tr>
</tbody>
</table>

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank, Reserve Bank of Fiji / *Converted from US$, as of 28/04/2020*
**IMPORTANCE OF NEW ZEALAND VISITOR SPEND IN THE PACIFIC**

New Zealand visitor spend contribution in the pacific was substantial pre Covid19 (almost one billion NZD), and will be important for pacific tourism sector recovery.

<table>
<thead>
<tr>
<th></th>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook Islands</td>
<td>166,934</td>
<td>2,386</td>
<td>NZ$421,617,500</td>
<td>69%</td>
<td>NZ$290,315,000</td>
</tr>
<tr>
<td>Niue</td>
<td>10,448</td>
<td>226</td>
<td>NZ$11,700,000</td>
<td>81%</td>
<td>NZ$9,466,000</td>
</tr>
<tr>
<td>Tonga</td>
<td>58,783</td>
<td>7,100</td>
<td>NZ$156,650,000</td>
<td>49%</td>
<td>NZ$76,922,000</td>
</tr>
<tr>
<td>Samoa</td>
<td>181,473</td>
<td>5,158</td>
<td>NZ$413,300,000</td>
<td>43%</td>
<td>NZ$177,714,000</td>
</tr>
<tr>
<td>Solomon Islands</td>
<td>25,700</td>
<td>6,400</td>
<td>NZ$135,000,000</td>
<td>7%</td>
<td>NZ$8,895,000</td>
</tr>
<tr>
<td>Vanuatu</td>
<td>97,182</td>
<td>15,000</td>
<td>NZ$468,280,000</td>
<td>14%</td>
<td>NZ$64,706,000</td>
</tr>
<tr>
<td>Fiji</td>
<td>894,389</td>
<td>41,338</td>
<td>NZ$1,551,500,000</td>
<td>23%</td>
<td>NZ$357,247,000</td>
</tr>
</tbody>
</table>

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank, Reserve Bank of Fiji / (Note these figures include VFR(sometimes 50%) and tourist arrivals)

* Converted from US$, as at 28/04/2020
### Tonga

**No CONFIRMED CASES**
- Tonga will be under nationwide curfew from 8pm to 6am until further notice.
- Economy will see zero growth in 2020 with no tourists.
- Tongan economy estimated gross domestic product (GDP) loss of over $60m pa’anga for the FY2020.
- If the pandemic continues without stopping in the first two quarters of FY2021, GDP loss of over $200m is forecast.
- A $60 million pa’anga short-term economic and social stimulus package launched.
- Some of the funding will go towards the economic and social recovery cluster. It will target affected businesses ($16.4m), affected employees ($5m), and community livelihood ($1m).

**ACCESS:**
- All foreign nationals are now banned from entering Tonga, effective until 17th April.
- Tongan citizens and emergency officials will have to undergo a 14-day self-quarantine period.
- Public gathering restrictions are also being enforced; 20 people (indoors) and 40 people (outdoors).

### Cook Islands

**No CONFIRMED CASES**
- In Code Yellow – work from home.
- Economy will contract to -2.2% in 2020 with collapse in tourism.
- More information on travel restrictions and updates can also be sought from the Cook Islands Ministry of Health website and the Cook Islands Tourism Corporation website.

**ACCESS**
- Air Rarotonga interisland air services have been suspended until 30th April, 2020.
- Air New Zealand providing one return flight per week.
- Every person seeking entry into Cook Islands will have 14-day quarantine.

### Fiji

**Limited cases**
- Fiji’s economy is projected decline by 4.9% in 2020.
- A Government-mandated home quarantine — a compulsory requirement for all those returning to the country from abroad remains in effect.
- A nationwide curfew (from 10pm to 5am daily) is in effect until further notice.
- Social gatherings of up to 20 people are now permitted.
- All non-essential businesses remain closed. Businesses such as restaurants remain open provided, they cut seating capacity below 20 people, practice safe physical distancing between tables and at queues, and must focus on takeaway and delivery orders.
- National-wide curfew 8pm – 5am daily.
- Fever clinics open throughout Fiji.

**ACCESS**
- 26th March, the Nandi International Airport closed until further notice.
- All International borders closed except for repatriation. Home quarantine in effect.
- All returning passengers will be subjected to a compulsory 28 day quarantine period.
- The port of Suva remains open for international freight shipping and inter-island cargo shipping; any passenger travel, however, remains forbidden.

### Niue

**No CONFIRMED CASES**
- Yellow Alert: Imminent threat: Aim to delay widespread transmission via targeted measures including border restrictions.
- Niuean residents to avoid non-essential travel.

**ACCESS**
- Entry now closed to all but Niuean residents (citizens, permanent residents and working visas) and essential workers granted an exemption by the GoN.
- People intending to travel to Niue who have been in – The People’s Republic of China (including Hong Kong, Taiwan, Macau), Iran, Italy, Japan, Singapore, South Korea, Indonesia and Thailand within the last 14 days prior to travel, without written authorization from the Government of Niue, will be refused entry.
- Those returning to Niue are required to self-isolate for 14 days on arrival.
### Samoa
No CONFIRMED CASES

- **Effective 15th April** Samoa has eased some of its State of Emergency Orders after a close review by the Prime Minister and Cabinet this week, as the country still has no confirmed case of Covid-19.
- Restaurants reopened with conditions; inter-island ferries re-opened.
- Samoa’s economy is expected to contract from 3.5% in 2019 to -3.0% before slightly rebounding to 0.8% in 2021.
- Already experienced low tourism espec. VFR due to measles and poor weather beginning 2020 abroad of covid-19.
- No public gathering of more than 5 people in public places.
- $US253.6 million stimulus package 07 04 Over ½ funded by donor partners.

**ACCESS**
- Except in exceptional circumstances with cabinet approval, starting from 12am of Thursday morning, 26 March 2020, all international travel to and from Samoa by plane are ceased.
- Ship access to Apia wharf is limited specifically for the purposes of trade, fishing, and petroleum, and the Ministry of Health is required to continue with the approved medical clearance of all crew members.

### Vanuatu
No CONFIRMED CASES

- **Economy will contract to -1.0% in 2020**

**ACCESS**
- **Air:** 20 March 2020, all Vanuatu ports of entry are now closed until further notice.
- As of 20 March 2020, all Vanuatu ports of entry are now closed until further notice. This measure is taken to minimize the risks of importing COVID-19 into the country.
- Returning permanent residents and citizens of Vanuatu are permitted to enter but must self-quarantine for 14 days on arrival before they can be allowed back to their families and communities.
- Special consideration will be applied to foreign diplomatic missions and international organizations in Vanuatu on a case-by-case basis, in consultation with Vanuatu’s Department of Foreign Affairs and International Cooperation.
- Special consideration will be provided for medical evacuations on a case-by-case basis in consultation with Vanuatu’s Department of Foreign Affairs and International Cooperation.

### Solomon Islands
No CONFIRMED CASES

**ACCESS**
- Closed air travel Effective immediately all non-citizens will not be permitted to enter the Solomon Islands.
- Incoming Solomon Islands Citizens and residents who travelled through any country reporting cases of COVID-19(Coronavirus) will be permitted to enter however, will undergo mandatory strict quarantine for 14 days.
- Any air crew upon or after arrival in the Solomon Islands is mandated to report to Health authorities if they become unwell and display symptoms of the COVID-19 during the 14-day period after arrival.

### Tuvalu
No CONFIRMED CASES

- A state of public health emergency has been declared.
- Weak fiscal frameworks and a reliance on external revenue make sustainable trust funds vital for securing the economic future.
- Growth still expected at 2.7% for 2020.

**ACCESS**
- New measures pertaining to entry requirements etc will be made available in due course.

### Covid 19 pacific status
There are confirmed covid 19 cases in: Fiji, French Polynesia, New Caledonia and PNG within the pacific.
IN THE NEXT 12 MONTHS

If there were limited cases and no travel restrictions, New Zealanders are willing to travel.

Intention may be overstated, but when we compare the actual travel benchmark to Australia v intended, we can see a similar level.

Looking at pacific travel intentions the intended levels are higher than the actual 2019 data – this suggests a stronger propensity to travel to the Pacific (given the current sentiment, perceptions and expectations).

NOTE: this confidence measure indicates intention. Factors like price, overall country health status, flight availability which may impact decision-making have not been considered.

20. Assuming Covid19 was under control in New Zealand, Australia and the Pacific Islands, with limited number of cases, and no restrictions to travel nor quarantine imposed, how likely will you travel to any of the following destinations within the next 12 months?

<table>
<thead>
<tr>
<th>Destination</th>
<th>Very likely</th>
<th>Quite likely</th>
<th>Might or might not</th>
<th>Quite unlikely</th>
<th>Very unlikely</th>
</tr>
</thead>
<tbody>
<tr>
<td>NZ - Auckland region</td>
<td>23%</td>
<td>20%</td>
<td>19%</td>
<td>15%</td>
<td>25%</td>
</tr>
<tr>
<td>NZ - Southern North Island and Wellington</td>
<td>14%</td>
<td>17%</td>
<td>25%</td>
<td>10%</td>
<td>34%</td>
</tr>
<tr>
<td>NZ - Central North Island</td>
<td>14%</td>
<td>15%</td>
<td>25%</td>
<td>12%</td>
<td>34%</td>
</tr>
<tr>
<td>NZ - Lower South Island</td>
<td>12%</td>
<td>16%</td>
<td>24%</td>
<td>12%</td>
<td>36%</td>
</tr>
<tr>
<td>NZ - South Island East Coast</td>
<td>11%</td>
<td>16%</td>
<td>22%</td>
<td>15%</td>
<td>36%</td>
</tr>
<tr>
<td>Australia</td>
<td>13%</td>
<td>12%</td>
<td>22%</td>
<td>12%</td>
<td>41%</td>
</tr>
<tr>
<td>NZ - North Island Northland</td>
<td>11%</td>
<td>13%</td>
<td>21%</td>
<td>17%</td>
<td>38%</td>
</tr>
<tr>
<td>NZ - Upper South Island</td>
<td>8%</td>
<td>15%</td>
<td>24%</td>
<td>17%</td>
<td>36%</td>
</tr>
<tr>
<td>NZ - South Island West Coast</td>
<td>8%</td>
<td>10%</td>
<td>23%</td>
<td>15%</td>
<td>44%</td>
</tr>
<tr>
<td>Other parts of the world</td>
<td>6%</td>
<td>9%</td>
<td>14%</td>
<td>12%</td>
<td>60%</td>
</tr>
<tr>
<td>Cook Islands</td>
<td>3%</td>
<td>5%</td>
<td>15%</td>
<td>12%</td>
<td>66%</td>
</tr>
<tr>
<td>Fiji</td>
<td>4%</td>
<td>4%</td>
<td>15%</td>
<td>13%</td>
<td>64%</td>
</tr>
<tr>
<td>Other Pacific destinations</td>
<td>3%</td>
<td>4%</td>
<td>11%</td>
<td>14%</td>
<td>67%</td>
</tr>
<tr>
<td>Vanuatu</td>
<td>2%</td>
<td>3%</td>
<td>10%</td>
<td>14%</td>
<td>70%</td>
</tr>
<tr>
<td>Niue</td>
<td>2%</td>
<td>3%</td>
<td>11%</td>
<td>13%</td>
<td>71%</td>
</tr>
<tr>
<td>Solomon Islands</td>
<td>2%</td>
<td>3%</td>
<td>8%</td>
<td>13%</td>
<td>74%</td>
</tr>
<tr>
<td>Samoa</td>
<td>2%</td>
<td>3%</td>
<td>16%</td>
<td>14%</td>
<td>66%</td>
</tr>
<tr>
<td>Tonga</td>
<td>2%</td>
<td>3%</td>
<td>10%</td>
<td>16%</td>
<td>70%</td>
</tr>
</tbody>
</table>

**TOP 2 BOX - VERY LIKELY+QUITE LIKELY**

<table>
<thead>
<tr>
<th>Benchmark: % of NZ population travel to this destination*</th>
<th>Benchmark: % of AU population travel to this destination*</th>
</tr>
</thead>
<tbody>
<tr>
<td>NZ - Auckland region</td>
<td>NZ - Auckland region</td>
</tr>
<tr>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>NZ - Southern North Island and Wellington</td>
<td>NZ - Southern North Island and Wellington</td>
</tr>
<tr>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>NZ - Central North Island</td>
<td>NZ - Central North Island</td>
</tr>
<tr>
<td>29%</td>
<td>29%</td>
</tr>
<tr>
<td>NZ - Lower South Island</td>
<td>NZ - Lower South Island</td>
</tr>
<tr>
<td>27%</td>
<td>27%</td>
</tr>
<tr>
<td>NZ - South Island East Coast</td>
<td>NZ - South Island East Coast</td>
</tr>
<tr>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>Australia</td>
<td>Australia</td>
</tr>
<tr>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>NZ - North Island Northland</td>
<td>NZ - North Island Northland</td>
</tr>
<tr>
<td>23%</td>
<td>23%</td>
</tr>
<tr>
<td>NZ - Upper South Island</td>
<td>NZ - Upper South Island</td>
</tr>
<tr>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>NZ - South Island West Coast</td>
<td>NZ - South Island West Coast</td>
</tr>
<tr>
<td>15%</td>
<td>15%</td>
</tr>
<tr>
<td>Other parts of the world</td>
<td>Other parts of the world</td>
</tr>
<tr>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>Cook Islands</td>
<td>Cook Islands</td>
</tr>
<tr>
<td>2.3%</td>
<td>2.3%</td>
</tr>
<tr>
<td>Fiji</td>
<td>Fiji</td>
</tr>
<tr>
<td>8%</td>
<td>8%</td>
</tr>
<tr>
<td>4.2%</td>
<td>4.2%</td>
</tr>
<tr>
<td>Other Pacific destinations</td>
<td>Other Pacific destinations</td>
</tr>
<tr>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Vanuatu</td>
<td>Vanuatu</td>
</tr>
<tr>
<td>6%</td>
<td>6%</td>
</tr>
<tr>
<td>0.3%</td>
<td>0.3%</td>
</tr>
<tr>
<td>Niue</td>
<td>Niue</td>
</tr>
<tr>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>0.2%</td>
<td>0.2%</td>
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<tr>
<td>Solomon Islands</td>
<td>Solomon Islands</td>
</tr>
<tr>
<td>5%</td>
<td>5%</td>
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<tr>
<td>0.03%</td>
<td>0.03%</td>
</tr>
<tr>
<td>Samoa</td>
<td>Samoa</td>
</tr>
<tr>
<td>5%</td>
<td>5%</td>
</tr>
<tr>
<td>1.6%</td>
<td>1.6%</td>
</tr>
<tr>
<td>Tonga</td>
<td>Tonga</td>
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<tr>
<td>4%</td>
<td>4%</td>
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<tr>
<td>0.6%</td>
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</tr>
<tr>
<td>Pacific destinations</td>
<td>Pacific destinations</td>
</tr>
</tbody>
</table>

Source FORWARD WELLBEING AND ATTITUDE SURVEY. 17 04 20 (wave 2). New Zealand representative on line sample. Pacific destinations.

* Calculation: latest annual arrivals (2019) from NZ or AU as a percentage of the population of NZ and AU. Source for annual arrivals: SPTO.
PACIFIC AVIATION SECTOR CONNECTIVITY

STATUS SUMMARY

Airline connectivity and commercial capacity in the future is central to enable tourism sector recovery.

Airline connectivity is impacted by:

- Border access or restriction (Local country policy on access)
- Airline viability and willingness to fly routes (commercial viability)
- Aviation infrastructure – to support and enable flights: safety & compliance to standards, maintenance capability, fuel, processing and security

All borders to pacific countries including New Zealand are currently closed to commercial air traffic. There is no indication when these may open at this time.

Flights are only operating on a charter basis for essential supplies, some cargo and essential personnel or repatriation to some countries.

- Niue still has a commercial flight once a week. It has restrictions on numbers (26 max coming up) and every second flight is a cargo only heading up (but can carry passengers for the return leg).
- Cook Islands has a once a week flight

The key current focus is maintaining air freight services on a charter or regular contract basis (Niue and Cook islands). This is a substantially reduced service.

Projecting scenarios that may enable border restrictions to be lifted will be very important in the development of tourism sector recovery within the pacific. New Zealand pacific policy is particularly important for many of the island nations in tourism recovery planning.

Airlines status risk is extreme

With commercial flights suspended and immediate loss of income and related cash flow, all airlines operating within the pacific are at extreme financial risk and are relying on government support. Airline connectivity relates to both international and domestic (within country) connectivity. The need for both is a consideration in future tourism sector recovery and support for pacific airlines.

Airline sector infrastructure

Certification and compliance is critical to enable aircraft to fly. Without certification of aircraft, pilots, security, navigation and aerodromes, flights can not occur. Ensuring the continuation of this function, even over periods of limited flying, will enable the sector to be more immediately responsive to increased demand. Without this the time required to recertify could slow responsiveness down. Flight simulation time for pilots, while they are not actively flying is a consideration with limited access in the pacific to air simulators.

MODELING AIRLINE SECTOR STATUS WILL BE IMPORTANT IN CONSIDERING PACIFIC TOURISM RECOVERY AND SCENARIO TIMING
### PACIFIC AVIATION SECTOR: RESPONSE FOR RECOVERY

**Passenger air capacity is critical**

- Tourism volumes are largely determined by supply of air capacity: available flights at the right price.
- Airlines are now uneconomic and are exiting the Pacific or cutting what are now non-economic routes.
- Loss of competition and capacity are significant economic recovery risks.
- For tourism connectivity a minimum weekly service is required.

**Supply ahead of demand**

- The tourism sector requires supply ahead of demand to enable rebuild. Minimum weekly flights with seats available to be booked at an accessible price for the market will generate demand.
- Early investment in maintaining connectivity and providing availability is key to stimulation and recovery.

**Potential of increasing prices and supply constraint**

- Airlines will aim to grow margin/yields on constrained capacity to cover increased fixed cost allocations per flight. There will be an incentive for airlines to keep airfares high to generate cash and maintain demand ahead of supply. This is in conflict with tourism objectives and accelerating sector recovery.
- Distancing requirements on flights worsen yield. If distancing is required then flight risk for travellers and host countries may limit willingness to travel & open boarders and financial viability for airlines.
- Many travellers have airfare credits available. Use of this will not produce new cash. Airlines will seek additional cash plus use of credits to provide positive cash flows through higher airfares.
- A travel status not requiring on flight distancing is a key part of strategy to establish reasonable airfares quickly without additional financial support.
- Mechanisms to ensure no price gouging and to ensure capacity is available may be required.
PACIFIC AVIATION SECTOR: RESPONSE FOR RECOVERY

Freight as a support mechanism to maintain connectivity

- Freight on key routes is a key avenue to maintain flight connectivity in the short term and to support route viability in recovery.
- Open and regular freight flights support the overall airline sector and infrastructure to remain open and operational, and enable flexible and immediate response to increasing demand in reactivation and recovery.
- The current freight only environment is not commercially viable for any airline with fixed costs on any of the pacific routes.
- Supporting variable cost (fuel and operational flight costs) would remove some of the risk from the airline and provide the kickstart required to re-establish air services and connectivity.

 Reactivation timing

- Scenario planning to project recovery response timing and collaboration between airlines and sector leaders is critical to coordinate supply ahead of activated demand.
- Policy, systems and procedures for managing travel safety at all journey points, and optimising capacity, yield and prices will be important and require clear pre planning to enable responsiveness as situations change.
<table>
<thead>
<tr>
<th>Country</th>
<th>Status</th>
<th>Passenger</th>
<th>Freight</th>
<th>Risk Level</th>
<th>Key Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cook Islands</td>
<td>International</td>
<td></td>
<td></td>
<td></td>
<td>Weekly scheduled flight Wednesdays</td>
</tr>
<tr>
<td></td>
<td>AKL Only</td>
<td>Limited</td>
<td>Yes</td>
<td>medium</td>
<td></td>
</tr>
<tr>
<td>Domestic</td>
<td>Reduced</td>
<td>Suspended</td>
<td>Yes</td>
<td>medium</td>
<td>Air Rarotonga only flying freight, pax only by exception</td>
</tr>
<tr>
<td>Tonga</td>
<td>Diversion ends 4 April</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>International</td>
<td>Suspended</td>
<td>No</td>
<td>No</td>
<td>medium</td>
<td>Air NZ scheduled flight 8 April</td>
</tr>
<tr>
<td>Domestic</td>
<td>Suspended</td>
<td>No</td>
<td>No</td>
<td>medium</td>
<td>Flights to re-start 6 April</td>
</tr>
<tr>
<td>Samoa</td>
<td>Closed</td>
<td>No</td>
<td>No</td>
<td>High</td>
<td>No commercial scheduled flights, charter only on request</td>
</tr>
<tr>
<td>Niue</td>
<td>Reduced</td>
<td>Limited</td>
<td>Yes</td>
<td>medium</td>
<td>Weekly scheduled flight Tuesdays</td>
</tr>
<tr>
<td>Tuvalu</td>
<td>Closed</td>
<td>No</td>
<td>No</td>
<td>High</td>
<td>No air service. Fiji also closed</td>
</tr>
<tr>
<td>Fiji</td>
<td>Restricted</td>
<td>No</td>
<td></td>
<td></td>
<td>Pax and crew banned. Fiji nationals 14 day quarantine. Outer island flights suspended</td>
</tr>
</tbody>
</table>
By country: status and recovery focus
**Overview:** Emerging themes

Summary from Pacific tourism leaders from across the Pacific. Overall there is strong alignment in overall focus and prioritisation. Local differences that emerged largely reflect differing stages of tourism sector development and the specific local tourism and economic environment.

**Key Risks**

**Economic**
- Immediate deep and sustained national economic impact
- Lack of internal financial reserves to provide support or sustained support across most countries
- Substantial flow on impact to the wider economy

**People and capability**
- Widespread unemployment
- Loss of skills at all levels
- Flight from country

**Infrastructure**
- Loss of core infrastructure and past investment – that would be very difficult to redevelop; Accommodation, F&B and experiences

**Connectivity**
- Loss of airlines, flight availability, frequency and potentially high prices

**Situation: Significant impact**

- No confirmed cases in...
- Borders closed
- 14 - 28 day quarantine imposed across all countries
- Extremely limited flights mainly freight on a charter basis and not economic

**Recovery preparedness**

**Short**
- Clear recovery planning - response focus and initiatives
- Immediate financial support if available: wage, focused micro financing targeted at the viable core, tax, compliance fee and bank relief.
- Maintenance of air connectivity
- Identify the critical viable core and support
- Training, skills development & sector infrastructure employment initiatives

**Mid**
- Scenario planning and response timing clarity
- Focus on core markets: local, regional, NZ, AUS and early activation targets
- Advance a travel bubble strategy - safe opening if viable
- Develop digital capability and messaging
- Elevate differentiated country propositions and extend awareness of experiences available within the Pacific
- Activate targeted differentiated reactivation campaigns - at the right time

**Response themes**

**IDEAL**

**Economic**
- Wage support
- Micro financing to support and maintain the core

**Information**
- To inform decision making around timing of initiatives, targeting, positioning and messaging

**Sector skills development**
- Digital, management, service and culture

**Clear strategy**
- To optimise timing, focus, initiatives and investment

**Acceleration of sector development projects**
- Infrastructure, marketing and positioning strategy, digital, sustainability

**Reactivation marketing programmes**
Mainly tourism, other industries like agricultural exports have declined steadily

Share of tourism as a percentage of export (2018) 87.0%
Share of tourism contributions as a percentage of GDP (2018) 34.4%
Tourism Employment as % of total Employment (2016)

International visitor arrival (2019) 166,934
Number of people employed in the related industry (2016) 2,386
Total visitor spending (2018)* NZ$421,617,500

Top 5 source of visitors (2019)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td>69%</td>
</tr>
<tr>
<td>Australia</td>
<td>17%</td>
</tr>
<tr>
<td>USA</td>
<td>5%</td>
</tr>
<tr>
<td>Germany</td>
<td>2%</td>
</tr>
<tr>
<td>UK</td>
<td>2%</td>
</tr>
</tbody>
</table>

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank, RNZ

* Converted from US$, as at 28/04/2020
Cook Islands: Status summary

Key Risks

- Domestic Economy
- Limited Financial resources for longer term support if required
- Air Rarotonga – important for connectivity
- Population and skills flight
- Sustaining the core key businesses and infrastructure with debt and ongoing costs
- 35 per cent of businesses are outside the tourism sector. To be maintained an open local economy and some freight connection via New Zealand will be required.

Situation: Significant long term impact

- No confirmed cases
- Borders closed
- 14 day quarantine
- 1 return flight per week scheduled
- Freight and repatriation

Recovery

Short
- Recovery planning in place

Mid
- Maintenance of air connectivity critical
- Scenario planning focus on building NZ market first
- Funding support required to deliver recovery stimulation marketing activation

Response Themes

- Domestic stimulus package in place including wage support mirroring New Zealand so financially secure for 3 months
- Market intelligence surveys to understand the situation and focus response
- Jobs and skills development program – including public works
- Public private partnerships to support strategy and communication development
PRE COVID-19: TOURISM SECTOR STATUS - NIUE

Mainly tourism, taro export which used to dominate is reduced to almost zero.

- Number of people employed in the related industry (2018): 226
- International visitor arrival (2018): 10,448
- Total visitor spending (2018)*: NZ$11,700,000

Top 5 source of visitors (2019):
- New Zealand: 81%
- Australia: 10%
- USA: 2%
- Japan: 1%
- UK: 1%

Share of tourism as a percentage of GDP (2018): 41.0%
Tourism Employment as % of total Employment (2018): 32.3%

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, New Zealand Geographic website

* Converted from US$, as at 28/04/2020
Niue: Status summary

Key Risks
- Domestic Economy
- Population flight (to NZ) and related loss of businesses and skills
- Tourism business sustainability/closure
- Charter fishing & diving (most exposed)

Situation: Significant impact

- No confirmed cases
- Borders closed (Reparation & Emergency)
- 14 day quarantine
- 1 return flight per week scheduled (Flight reparation)

Recovery
- Recovery planning in place
- Domestic support for Food & beverage business is important
- Implement response package
  - Short
  - Mid
    - Maintenance of air connectivity critical
    - Scenario planning to focus timing for reactivation marketing and product availability.

Response Themes
- 12 week wage subsidies
- Micro financing
- Acceleration of sustainable tourism projects
- Recovery marketing program elevates
PRE COVID-19: TOURISM SECTOR STATUS - SAMOA

Visiting friends and family is a key source of visitors to the Pacific. If considering segment targeting for recovery, friends and family may be a consideration.

| Share of tourism as a percentage of export (2017) | 60.1% |
| Share of tourism contributions as a percentage of GDP (2018) | 30.4% |
| Tourism Employment as % of total Employment (2015) | 12.5% |

International visitor arrival (2019) 181,473
Number of people employed in the related industry (2015) 5,158
Total visitor spending (2018)* NZ$413,300,000

Top 5 source of visitors (2019)

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Zealand</td>
<td>43%</td>
</tr>
<tr>
<td>Australia</td>
<td>22%</td>
</tr>
<tr>
<td>American Samoa</td>
<td>8%</td>
</tr>
<tr>
<td>USA</td>
<td>7%</td>
</tr>
<tr>
<td>Fiji</td>
<td>2%</td>
</tr>
</tbody>
</table>

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank

* Converted from US$, as at 28/04/2020
### Samoa: Status summary

**Key Risks**
- Domestic Economy
- CONNECTIVITY :: CAPABILITY :: INFRASTRUCTURE
- Losing air connectivity, sector capability and over a longer period infrastructure with extended sector closure

### Situation: Significant impact

<table>
<thead>
<tr>
<th>Response themes</th>
<th>Recovery</th>
<th>Short</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td><strong>Immediate support</strong> (wage and micro financing) to ensure the core of the sector and successful operators are not lost</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Mid</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Maintenance of air connectivity critical</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Scenario planning to focus timing for reactivation marketing and product availability.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Activation for recovery including a strong digital response and promotional campaign – targeting NZ &amp; Aus first</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>No confirmed cases</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Borders closed</strong> (Reparation &amp; Emergency)</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Charter freight flights</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Ship access limited to trade</td>
</tr>
</tbody>
</table>

**FORWARD**
PRE COVID-19: TOURISM SECTOR STATUS - TONGA

- **Share of tourism as a percentage of export (2017):** 47.6%  
- **Share of tourism contributions as a percentage of GDP (2018):** 25.4%  
- **Tourism Employment as % of total Employment (2018):** 21.2%

**International visitor arrival (2019):** 58,783

**Number of people employed in the related industry (2018):** 7,100

**Top 5 source of visitors (2019):**
- New Zealand: 49%
- Australia: 22%
- USA: 14%
- China: 3%
- Fiji: 2%

**Total visitor spending (2018)**

NZ$156,650,000

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank

*Converted from US$, as at 28/04/2020*
## Tonga: Status summary

### Key Risks
- Domestic Economy
- CONNECTIVITY :: CAPABILITY :: INFRASTRUCTURE
- Losing air connectivity, sector capability and over a longer period infrastructure with extended sector closure

### Recovery

#### Short
- **Immediate wage support** Employees who have lost their jobs due to the 
- Deferrment of loan and interest repayments 
- Tax imposed on goods and services within Tonga would be deferred until 30 June, except for PAYE. 
- goods imported to Tonga in order to revive the tourism sector as well as fisheries and agriculture would also be duty free until 30 June.

#### Mid
- Maintenance of air connectivity critical

### Response themes
- Economic and social stimulus package of $60 million pa‘anga. The package will provide short-term financial assistance for all sectors of the Tongan economy, including tourism: 
  - Economic and social recovery - $22.4m [target affected businesses ($16.4m), affected employees ($5m), and community livelihood ($1m)].

### Situation: Significant impact
- No confirmed cases
- Borders closed (Reparation & Emergency)
- Charter freight flights
PRE COVID-19: TOURISM SECTOR STATUS – SOLOMON ISLANDS

Share of tourism as a percentage of export (2017)
- 13.0%

Share of tourism contributions as a percentage of GDP (2018)
- 12.5%

Tourism Employment as % of total Employment (2017)
- 11.0%

International visitor arrival (2017)
- 25,700

Number of people employed in the related industry (2017)
- 6,400

Total visitor spending (2018)*
- NZ$135,000,000

Top 5 source of visitors (2019)

- Australia: 40%
- New Zealand: 7%
- Fiji: 6%
- USA: 6%
- Papua New Guinea: 6%

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank

* Converted from US$, as at 28/04/2020
SOLOMON ISLANDS: Status summary

Key Risks

Lack of fundamental resilience and extreme vulnerability
The tourism industry in the Solomon Islands is fledgling, with around 40% occupancy on average

Maintaining the core of the sector is critical for future recovery

Air connectivity is tenuous. Virgin airlines have pulled out and are now under administration. Air Sol is potentially a critical part of future air connectivity. Transit restrictions from other countries may further limit access and recovery.

Situation: Significant impact on an emergent sector with low resilience

• No confirmed cases
• Closed to Air travel
• Closed to noncitizens
• Quarantine 14 days
• Charter freight flights

Recovery

Short
• Immediate identification of core successful business critical to the core tourism offer and providing contestable microfinancing to enable a sustainable shut down and minimum capability retention

Mid
• Without support, previous sector investments in infrastructure and capability is at risk of being lost. The IFC of the world bank has been a strong supporter as have other government organisations.

Response themes

• There is no government capacity to provide wage relief or support and no capacity to administer this
• NZ government support has established 2 in country advisors. Product development and destination marketing have been a focus; however it is questionable if the resources and budget will be sufficient to complete a recovery programme. Technical and operational support for the sector will be required.
PRE COVID-19: TOURISM SECTOR STATUS - VANUATU

- **Share of tourism as a percentage of export (2015):** 79.0%
- **Share of tourism contributions as a percentage of GDP (2018):** 45.9%
- **Tourism Employment as % of total Employment (2018):** 34.5%

**International visitor arrival (2019):** 97,182

**Number of people employed in the related industry (2018):** 15,000

**Total visitor spending (2018)*:** NZ$468,280,000

**Top 5 source of visitors (2019):**
- Australia: 62%
- New Zealand: 14%
- China: 4%
- Japan: 1%

* Converted from US$, as at 28/04/2020

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank
Vanuatu: Status summary

Source: Adela Issacher; Chief Executive Officer (CEO) Vanuatu Tourism Office

Situation: Significant impact. Cyclone Harold damage has further amplified the sector crisis

Key Risks

- **Aviation connectivity** - international and domestic: Regional dispersal is currently challenging and the local airline failure would make it impossible. Sector recovery is dependent on international air connectivity.
- **Loss of key operators.** Without the core it is very difficult for the sector to meet visitor needs and expectations overall and rebuild will be very challenging.
- **Unemployment**, loss of jobs and incomes
- **Loss of skills.** Reduced short to medium term tourism employment will force people to move, potentially to seasonal agricultural work and with this loss of skills to the sector and the cost of retaining for recovery.

Recovery

- **Short**
  - Consultation with the wider sector to align programmes and recovery strategies.
  - Digital readiness programme to ensure sector ability to reactivate and connect with markets quickly and more effectively
  - Effective and targeted marketing campaign

- **Mid**
  - Targeting last ¼ of 2020 and 2021 to be operational
  - Focus recovery markets are targeted at: local tourism then New Zealand, Australia and following New Caledonia.
  - Sustainability policy and regenerative tourism

Response themes

- **Information – Data to** and enable focused decision-making
- **education and training** – Initiatives to build skills development. A key focus is digital readiness.
- **Scenario planning** Understanding scenarios to be able to better able to quickly respond to changing situations and plan response

Vanuatu: Status summary

Source: Adela Issacher; Chief Executive Officer (CEO) Vanuatu Tourism Office

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- **Aviation connectivity** - international and domestic: Regional dispersal is currently challenging and the local airline failure would make it impossible. Sector recovery is dependent on international air connectivity.
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  - Sustainability policy and regenerative tourism

Response themes

- **Information – Data to** and enable focused decision-making
- **education and training** – Initiatives to build skills development. A key focus is digital readiness.
- **Scenario planning** Understanding scenarios to be able to better able to quickly respond to changing situations and plan response
PRE COVID-19: TOURISM SECTOR STATUS - FIJI

Share of tourism as a percentage of export (2017): 48.5%
Share of tourism contributions as a percentage of GDP (2018): 38.9%
Tourism Employment as % of total Employment (2018): 35.5%

International visitor arrival (2019): 894,389
Number of people employed in the related industry (2018): 41,338
Total visitor spending (2018)*: NZ$1,551,500,000

Top 5 source of visitors (2019):
- Australia: 41%
- New Zealand: 23%
- USA: 11%
- China: 5%
- UK: 2%

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank, Reserve Bank of Fiji

* Converted from US$, as at 28/04/2020
### Fiji: Status summary

**Key Risks**
- Wider economic impact
- Mass sector related unemployment and extended to the tourism support sectors
- Loss of international management and specialist skills - With this loss of skills and capability in the sector
- Financial viability of core sector operators and accommodation providers - with very high costs of maintaining facilities and security – for an extended time.

**Recovery**
- **Short**
  - Timing of recovery initiatives and reactivating marketing to ensure best use of resources
  - Strong develop of safety as part of the pacific proposition campaign
  - Build local leadership capability and skills overall

- **Mid**
  - Further development of focused differentiated propositions within the pacific
    - with clear understanding of primary initial targets and building awareness of experiences beyond sand, sea, sun

**Response themes**
- Development of pacific new Zealand and Australian bubbles to enable safe and earlier border opening and market development
- Domestic and pacific regional tourism activation is a possible first step in recovery
- Scenario planning and information to support timing for implementing recovery reactivation
- training - Continued training to upskill the local tourism sector – there is an opportunity to build local leadership skills and capability
PRE COVID-19: TOURISM SECTOR STATUS – FRENCH POLYNESIA

- **Share of tourism as a percentage of export (2016):** 65.0%
- **Share of tourism contributions as a percentage of GDP (2018):** 85.0%
- **Tourism Employment as % of total Employment (2016):** 17.0%

International visitor arrival (2018): 237,978
Number of people employed in the related industry (2016): 10,500
Total visitor spending (2018)*: NZ$1,236,500,000

Top 5 source of visitors (2019):
- USA: 32%
- France: 21%
- Japan: 4%
- Australia: 4%
- New Zealand: 4%

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank

* Converted from US$, as at 28/04/2020
PRE COVID-19: TOURISM SECTOR STATUS – NEW CALEDONIA

- **Number of people employed in the related industry (2017)**: 5,246
- **International visitor arrival (2018)**: 120,339
- **Total visitor spending (2018)**: NZ$603,263,000

**Top 5 source of visitors (2019)**
- France: 31%
- Australia: 19%
- Japan: 18%
- New Zealand: 9%
- China: 1%

**Share of tourism as a percentage of export (2016)**: 13.2%
**Share of tourism contributions as a percentage of GDP (2018)**: 3.6%
**Tourism Employment as % of total Employment (2017)**: 5.6%

Data source: SPTO online database, SPTO 2018 Annual Visitor Arrivals Report, World Bank

* Converted from US$, as at 28/04/2020
Team.

Louise Beard
Project Lead, Design Strategy Analysis Reporting

Carlo Magni
Strategic modeling and quantitative design and project lead

Michelle Arsan
Insights specialist, qualitative research and strategy lead
Get in touch.

Louise Beard: louise@forwardhq.co.nz
Web: www.forwardhq.co.nz

Carlo Magni: carlo@forwardhq.co.nz
Email: info@forwardhq.co.nz
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