NEW ZEALAND
2020 ANNUAL RESEARCH: KEY HIGHLIGHTS

GLOBAL DATA 2019

10.3% Total GDP contribution

330MN Jobs globally (1 in 10 jobs)

While the global economy grew by 2.5%, Travel & Tourism grew significantly more at 3.5%

1 in 4 net new jobs were created by Travel & Tourism over the last five years

Global GDP impact by sector (2018 data). Share of total economy GDP

<table>
<thead>
<tr>
<th>Sector</th>
<th>GDP Contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mining</td>
<td>5%</td>
</tr>
<tr>
<td>Automotive</td>
<td>6%</td>
</tr>
<tr>
<td>Agriculture</td>
<td>7%</td>
</tr>
<tr>
<td>Travel &amp; Tourism</td>
<td>9%</td>
</tr>
<tr>
<td>Retail</td>
<td>9%</td>
</tr>
<tr>
<td>Financial Services</td>
<td>10%</td>
</tr>
</tbody>
</table>

NEW ZEALAND 2019 KEY DATA

CONTRIBUTION OF TRAVEL & TOURISM TO GDP

15.0% OF TOTAL ECONOMY
Total T&T GDP = NZD43.6BN (USD32.3BN)

+0.5% Travel & Tourism GDP growth vs +2.5% real economy GDP growth

CONTRIBUTION OF TRAVEL & TOURISM TO EMPLOYMENT

479.4 JOBS (000's)
(19.8% of total employment)

INTERNATIONAL VISITOR IMPACT

NZD15.1BN in visitor spend (20.6% of total exports)
(USD11.2BN)

INBOUND ARRIVALS

1. AUSTRALIA 40%
2. CHINA 12%
3. UNITED STATES 9%
4. UNITED KINGDOM 6%
5. GERMANY 3%
REST OF WORLD 30%

OUTBOUND DEPARTURES

1. AUSTRALIA 36%
2. UNITED STATES 8%
3. UNITED KINGDOM 6%
4. FIJI 5%
5. CHINA 4%
REST OF WORLD 41%

SECTOR CHARACTERISTICS (2019)

- LEISURE SPENDING 82%
- BUSINESS SPENDING 18%
- DOMESTIC SPENDING 61%
- INTERNATIONAL SPENDING 39%

1All values are in constant 2019 prices & exchange rates
As reported in March 2020