NEW ZEALAND
SEARCH AND RESCUE

COVID-19
SAR Environmental Scan
May 2020

1. Introduction

NZSAR initiated an environmental scan looking at the potential impact of Covid-19 on the search and rescue sector, now and into the future. The purpose of the scan is to provide an understanding and appreciation of the potential impacts of Covid-19 and aid our post-Covid business and operational planning.

2. Background[1]

In response to Covid-19, on Monday 23 March 2020, the Prime Minister issued an Epidemic Notice under section 5 of the Epidemic Preparedness Act 2006, enabling the use of a number of 'special powers' in legislation. The Notice lasts for three months from 23 March 2020 unless the Government chooses to lift it earlier.

To curtail the virus' spread, the Government has declared a nationwide State of National Emergency and moved the nation to Level 4 of New Zealand's four level alert system. At this level, everyone is required to stay at home, except those providing essential services, and only make physical contact with those they live with. The associated workplace closures and restrictions on activity have brought many areas of economic activity to a halt.

Level 4 ended at 11.59pm 27 April 2020, and the country moved to Alert Level 3. A transition to Alert Level 2 begins from 11.59pm 13 May 2019.

The New Zealand Government closed our border to almost all travellers from 23:59 on Thursday 19 March 2020 (New Zealand time). Only New Zealand residents and citizens (and their children and partners) are permitted to enter New Zealand.

Globally, lockdowns and physical distancing measures are becoming pervasive, bringing a broad swathe of global economic activity to a sudden stop, cutting incomes and disrupting financial markets. Sharp falls in global activity are expected and global activity is likely to contract over 2020 as a whole. Central banks and governments are announcing new support measures daily. These measures will not stave off recession, but will help build resilience and underpin the recovery.

"Despite the uncertainty, it is becoming more likely that New Zealand will see a deeper economic contraction in the June quarter than we have seen in our recorded history," Treasury said. While many sectors were expected to "bounce back quickly", others would "take longer, possibly years" to recover, the March summary said.

"Sectors like tourism, hospitality, retail ... even in 12 weeks, it's still going to be a very difficult trading environment for them."

[1] All comments are sourced from government websites (MoH, Treasury) unless otherwise stated

Opinion poll (Research NZ, 5 April 2020): Compared with the situation one week ago, significantly more respondents are now concerned with the possibility that they may **lose their jobs** (now 67%, was 57%), they may not be able to **pay their mortgage** (now 64%, was 57%), they may not be able to **pay their rent** (now 64%, was 57%), and that people may have **difficulties accessing government services** such as the pension, benefits, etc. (now 72%, was 66%).

Visitor arrival figures confirm international tourism has come to a standstill (Figure 1).

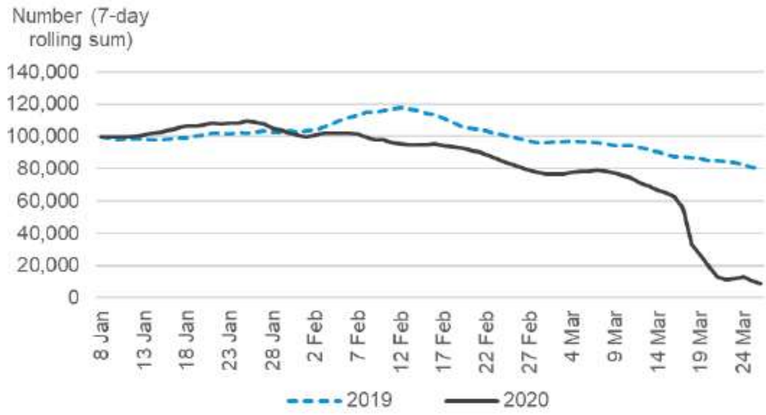

Figure 1: Total visitor arrivals (weekly) (Customs NZ))

The Government has implemented a range of financial support measures for households and businesses, including a wage subsidy scheme, a deferred mortgage scheme for home-owners affected by the virus, a short-term credit guarantee scheme to provide loans to small and medium-sized business, increases in welfare benefits, and business tax relief measures.

The Reserve Bank of New Zealand (RBNZ) has lowered the Official Cash Rate (OCR) to 0.25% from 1.00% and committed to keeping it there for at least the next year. The RBNZ also announced that, when required, further monetary stimulus will be provided through a $30 billion Large Scale Asset Purchase (LSAP) programme of NZ government bonds. It has also deployed a number of measures to provide additional liquidity to the business sector and support smooth financial market functioning, including a Term Auction Facility (TAF) that gives banks the ability to access term funding, with collateralised loans available out to a term of 12 months. Measures to increase bank capital requirements have been delayed for 12 months.

The New Economy[2].

How might the post-Covid structure of the New Zealand economy differ from before the crisis? The coming recession will be different from the 2008-09 global financial crisis, which was initially driven by financial institutional collapse. The new recession will impact real economic activity and international "people flows" – both migration and tourism. There is no foreseeable prospect of people flows returning to anything like past levels

Among New Zealand's biggest exports are dairy, wine, foreign tourism and students. The first two should recover well but the last two will be severely adversely affected for years, not months. And, if future New Zealand governments decide to maintain the current "completely eradicate Covid-19" strategy, that is likely to further stifle tourism and higher education prospects.

[2] Stuff: Norman Gemmell Apr 10 2020 *Coronovirus: The shape of New Zealand's post-Covid-19 economy*

BNZ Markets Outlook (28 April 2020):

> *"For us, though, the most important aspect of the recovery is how long will it take to get back to where we started and, alas, the answer remains a very long time. We continue to think it will be the tail end of 2023 before we get there which, of course, means activity levels, even then, will still be well below where trend growth would have taken us."*

6 May (Stuff – Reserve Bank)

Economic activity will be suppressed by almost 9 per cent by coronavirus restrictions even once the Government moves the country down to alert level 2, the Reserve Bank has forecast. The central bank estimates economic activity fell by 37 per cent during the level 4 lockdown and is currently down 19 per cent during level 3.

The hit to the economy would fall to 8.8 per cent at level 2, and then down to 3.8 per cent at level 1, it estimates. But the impact of the coronavirus restrictions would be very uneven, with the tourism industry slammed and the Government sector relatively unscathed, it forecast.

The continued near-annihilation of international tourism at level 2 would result in a 4 per cent drop in activity, while a forecast 75 per cent decline in domestic tourism and travel would deliver a 4.5 per cent hit. The remaining 0.3 per cent decline due to level 2 would be as a result of continued restrictions on mass gathering and public events.

Impact on Local Government (DIA)

Our updated analysis suggests that, overall, councils' revenues for the 2020/21 financial year are likely to be between 2.3 and 11 percent lower than the forecast pre-COVID-19 levels.

Councils that are in the most challenging position include those with a high tourism dependence, high levels of growth and/or rely on significant revenue from investments and dividends.

3. Covid – 19 Impact on SAR

The suggestions below for the impact of Covid-19 on the SAR sector are potential factors identified at this point in time. They are derived from the response to an initial questionnaire to SAR agencies, and follow-up feedback.

A. General impacts

During the period of lockdown.	There should be no outdoor recreational behaviour during this period. Those that breach the lockdown rules may be unlikely to call on official resources for help if required. Some risks for SAR associated with essential services – e.g. farming – and beacon activations from this group could be expected. The risk of wandering for those with cognitive impairment remains, as well as despondents. Issues relating to the source, provision and training for the use of PPE. Processes and support of personnel who are in an active response during this period. Absence of maintenance of equipment. Restrictions on the availability of SAR personnel. International shipping and limited aviation traffic to/from NZ and Pacific Islands.
For the first 0- 3 months post lockdown. (Made on assumptions on how & when that might occur)	Post lockdown we can expect to see an increase in recreational activity. Not only will people take advantage of getting out and about, increased unemployment may lead to more people taking part in outdoor activities. As well, activities associated with food gathering – hunting and fishing – are likely to see increased activity. Without international tourists, NZers may take the opportunity to explore those areas typically impacted by high tourist numbers, such as the Great Walks. It is likely this initial post-lockdown period will coincide with the onset of winter. For some people and activities this will increase the risk for SAR involvement as they undertake activities they are ill-prepared for. On the other hand, it may limit some activities due to weather conditions. Many recreation-focussed businesses will not be operating, particularly those with a strong historical dependence on tourism. There may be volunteer unavailability due to financial and Covid-related concerns. Inability of volunteers to maintain required certification competency standards. Need for development of support and information material for volunteers, and operating SOPs in relation to the alert level and associated risks. International shipping and limited aviation traffic to/from NZ and Pacific Islands.

3 – 9 months post lockdown.	No international tourist activity is anticipated during this time; likely to be a strong push for NZers to 'tourist at home'. This period should coincide with the end of winter / spring. Likely to see an increase in recreational activity (particularly free or low cost activities) and higher levels of NZers recreating in activities and areas typically dominated by tourists. Unemployment is still likely to be at significantly high levels. Many recreation-focussed businesses will not be operating, particularly those with a strong historical dependence on tourism. New recreational business start-ups can be expected – both to fill the void left by early closures and also to take advantage of any government support to kick start the economy. Impact of unemployment and Covid-19 related concerns on volunteer availability. Inability of personnel to maintain required competency standards. Delays in the supply of equipment for maintenance. Limitations on international travel, and associated RCCNZ support and activities in the Pacific.
In the medium term.	International tourists numbers are likely to be minimal at best. Businesses and individuals will be affected by long term unemployment / recession. Recreational businesses will be re-establishing, with a focus on domestic recreators. New recreational norms will be established. Limitations on international travel, and associated RCCNZ support and activities in the Pacific. Less donor funding available, and more competition from other volunteer social services for what is available,
In the medium to long term.	Tourism and international travel will re-start. The impact of the recession is likely to see a strong decrease in tourist numbers compared with pre-Covid times. NZers are likely to be settling into a new normal for their type of outdoor activities.

B. Impact on SAR

i. Demand for SAR services

- How might Covid-19 consequences impact on the overall number of people who end up needing SAR?
- Are more, or less people likely to participate in recreation (by land, sea or air)?
- Will new outdoor activities come more prevalent? Will they be more, or less risky than the existing ones?
- How might the absence / restricted numbers of inbound tourists affect SAR demand?
- How might NZers behave recreationally where there is an absence / restricted numbers of inbound tourists?

A	During the period of lockdown	Minimal SAR demand The risk of an operation should be limited to those undertaking essential services only; recreational behaviours associated with SAR should not be occurring. Any persons recreating as they should not be may also be very reluctant to call on official services. Reduction in SAR due to absence of tourists. Can expect a very limited number of operations activated through beacons – such as aircraft, farmers – associated with essential services. Potential for fewer operations in response to cognitive impairment (wandering) but an increase in despondents. International shipping and limited aviation traffic to/from NZ and Pacific Islands.
B	For the first 0- 3 months post lockdown	Normal or above seasonal demand. The end of lockdown is likely to coincide with the onset of winter conditions in many areas. It is likely that we will see a spike in post-lockdown activity as people make up for lost opportunities, as well as taking advantage of quiet tourist hotspots. Reduction in SAR associated with the absence of tourists may be offset by increased domestic recreational activity. A combination of increased opportunity, high risk weather, and post-lockdown behaviours, SAR demand is likely to be no less than normal for this season. International shipping and limited aviation traffic to/from NZ and Pacific Islands.
C	3 – 9 months post lockdown	Less than normal People may have adjusted to post-lockdown, and be returning to their normal recreational activities. However, their area of activity is likely to be larger with new activities, potentially putting them into higher risk situations. International shipping and limited aviation traffic to/from NZ and Pacific Islands.

D	In the medium term	Normal, or above New levels and types of recreational activities are likely to be the ‘new normal’, as people settle into routines and activities established in the first few months post-lockdown. Many people are likely to take advantage of the absence of tourists. Recreational support facilities/operators are likely to be limited. Australian tourist numbers may increase, with a corresponding higher participation rate in outdoor activities than other international tourists These factors are likely to see more people in situations of risk.
E	In the medium to long term	Normal or less It will take a long time for international tourist numbers and recreational activity to return to pre-Covid levels; overall tourist numbers will be low. Recreational support businesses will be those that have managed to establish and operate in a domestic-driven environment, or are normally seasonal in operation. With potentially less demand their support may be greater. NZers are likely to be filling many of the gaps of international tourists, but still in significantly lower numbers than international tourists. Some increase in trans-Tasman tourism likely.

ii. Supply of SAR services

- How might Covid-19 consequences affect the SAR sector’s ability to respond rapidly and effectively to distress alerts?
- Will Covid-19 consequences improve or degrade the accuracy and speed of alerts?
- How might the economic losses caused by covid-19 restrictions impact supply of SAR services?

A	During the period of lockdown	Reduced operational capability. Older and ‘at risk’ SAR personnel will not be available for service; this may limit the operational capability of some units (eg Coastguard Masters). As well, the requirements to provide ‘at home’ support and limit any at home risk, may also restrict some volunteer availability.
B	For the first 0- 3 months post lockdown	Reduced operational capability. Unemployment is likely to impact on the SAR volunteer sector. This may necessitate some people moving out of district to find work, and may remove them (temporarily) from availability. Some individuals may take up additional work to cover the loss of income by other family members, and be less available. Volunteers who were self-employed pre-Covid, particularly in tourist-related activities, are likely to face business impacts. Individuals with independent incomes may make themselves available for volunteering. Skeleton staffing levels in Antarctica; no helicopter or fixed wing capability.

		Disruptions to maintenance schedules may reduce the availability of SAR assets. Helicopter operators reliant on international tourists and commercial operations for their primary income will experience financial pressures.
C	3 – 9 months post lockdown	Stabilisation of capability; sub-normal Initial variations to life and lifestyle immediately post-lockdown are now becoming the new 'normal'. Routines established in the first few months are now normalised. For individuals who could not return to SAR soon after lockdown, they are likely to have filled this niche with other non-SAR activities. Individual groups may have lost members – more support required from adjacent groups. Post Covid PPE and SOPs may affect response times and availability. Reduced income may impact on the maintenance and supply of operational equipment. Skeleton staffing levels in Antarctica; no helicopter or fixed wing capability. Financial pressures on helicopter operators reliant on international tourists or commercial operations may see some operators cease or limit their availability.
D	In the medium term	New normal established This period of time will see stabilisation into post-lockdown (post Covid) levels of supply and availability. Volunteer numbers are likely to be reduced. Units or areas suffering loss of personnel or specialist capabilities will need to go through a re-building phase. Potential to attract new volunteers as people focus on 'what is really important'; support for local entities may increase. Financial pressures on helicopter operators reliant on international tourists or commercial operations may see some operators cease or limit their availability.
E	In the medium to long term	Ongoing stabilisation Existing SAR response capabilities may not align with new recreational locations, activities and behaviours. Additional training may be required. Limited financial resources may reduce or limit the ability to maintain existing levels of operational capability.

iii. Sector capacity and capability

- How might Covid-19 consequences impact on the SAR sector's overall service capability and capacity?
- Will Covid-19 consequences impose new costs, or contribute to, the SAR sector's funding?
- Could Covid-19 consequences make existing capabilities/ assets redundant or alternatively improve them?

A	During the period of lockdown	Obtaining and supplying PPE impacts directly on agencies. Issues associated with the medevac of a person from a non-NZ vessel. Restrictions on landing access for NZDF assets in the Pacific may limit P3 search capability during an operation.
B	For the first 0- 3 months post lockdown	Need for training and establishment of SOPs appropriate for operating under the existing alert level and associated risks. Individual's competency re-certification may be restricted; equipment maintenance and operational readiness may be reduced. Existing arrangements and agreements will continue to operate; where these do not continue their removal is unlikely to have a significant impact on capacity or capability at this time. Issues associated with the medevac of a person from a non-NZ vessel. Restrictions on landing access for NZDF assets in the Pacific may limit P3 search capability during an operation. SAR response resources for aviation and maritime events may be restricted due to CAA and NMZ operational qualification requirements. Maintenance / recertification delays may mean some assets are unavailable. Fundraising events will be impacted – limited to on-line only.
C	3 – 9 months post lockdown	Reduction in capability Support that is no longer available will not yet be replaced; any loss of volunteers will still not be filled. Ongoing issues with supply of equipment and maintenance may reduce operational capability. Training is reduced; more use of table-top exercising possible. SAR response resources for aviation and maritime events may be restricted due to CAA and NMZ operational qualification requirements. Loss of tourism demand and commercial work for helicopter use will put financial demands on non-NASO operators who are heavily reliant on tourism. Fundraising events will be impacted, reducing the money raised through donations.

D	In the medium term	Stabilisation to sub-normal level SAR agencies will settle into their post-lockdown new normal. Many funding and supply gaps will remain unfilled. Potential for overall agency capability to be reduced. Loss of overall helicopter capability due to financial demands on non-NASO operators who are heavily reliant on tourism. This will be a period of consolidation and re-focussing. New, or strengthened, relations will be formed. Opportunity exists to make use of people who have more available time; support for local entities may increase.
E	In the medium to long term	Stabilisation of new normal. Formalisation and review of policies to reflect pandemic risks. Long-term investment in PPE and associated training.

iv. SAR People

- Will Covid-19 consequences affect SAR volunteering / participation?

A	During the period of lockdown	Reduction in availability; unit/group membership unaffected unless by illness or bereavement. Response capability for a significant event reduced.
B	For the first 0- 3 months post lockdown	Membership largely unaffected, although some ongoing unavailability of individuals. Wellbeing support may be required. Response capability for a significant event reduced; increased support costs.
C	3 – 9 months post lockdown	Some loss of established volunteers. Increase in social awareness as a consequence of Covid-19 may see an uptake in altruistic activity that is deemed 'essential'. SAR may see an increase in volunteering activity, but this will be offset in some areas by recession impacts. Support for local entities may increase. Ongoing wellbeing support required. Increased support costs,
D	In the medium term	New recruitment phase SAR can attract new volunteers in this period, capitalising on increased social awareness and new relationships. Systems to recruit and induct new members will be required, particularly from younger volunteers.
E	In the medium to long term	Stabilisation into new normal

v. Sector Funding

- How might Covid-19 consequences affect SAR sector funding? LGB, Class 4 gaming, donations, corporate sponsorship, other sources….

A	During the period of lockdown	No public fundraising events possible. Increased costs associated with PPE.
B	For the first 0- 3 months post lockdown	Loss of income and support, particularly from local businesses directly impacted by Covid lockdown (e.g. gaming from pub charities, council funding). Impact greatest at unit/club level. Increased costs associated with PPE. No public fundraising events possible; reliance on web-based activity. Greater competition for available funding from NGO social service agencies.
C	3 – 9 months post lockdown	Ongoing reduction in funding. Limited public fundraising events possible; reliance on web-based activity. Greater competition for available funding from NGO social service agencies. Increased costs associated with PPE. Recession will reduce people's, and business', capability to provide funding. LGB funding least likely to be affected.
D	In the medium term	Ongoing reduction in funding, and competition for available funding from NGO social service agencies. Recession will reduce people's, and business', capability to provide funding. LGB funding least likely to be affected in 2020/21 year. Some new funding sources identified.
E	In the medium to long term	Stabilisation of new funding existence. LGB funding likely to be reduced in 2021/22.

vi. Sector Training and exercising

- How might Covid-19 consequences affect SAR agency / sector:
  - skill acquisition training?
  - Continuation training?
  - SAR exercises?
  - Delivery of SAR knowledge?

A	During the period of lockdown	No training or exercising This is offset by the short timeframe, and no associated decrease in skills or competencies

B	For the first 0- 3 months post lockdown	Limited training or exercising. Any training is likely to be intra-group, or remote, and focus on immediate needs. Access to training facilities will be restricted making skill maintenance and re-certification difficult. Pandemic response training will be required – use of PPE, sanitising procedures etc. Relevant training materials will need to be developed and delivered to all members. Limitations on international travel, and associated RCCNZ support and activities in the Pacific. Pacific nations also dealing with the impact of storm damage.
C	3 – 9 months post lockdown	Targeted needs-based training Focus on the development of on-line resources and training to support both competency and skills-development training. Training will be focussed on high-need areas; limited exercising. Ongoing training for operating under existing alert kevel. Limitations on international travel, and associated RCCNZ support and activities in the Pacific. Pacific nations also dealing with the impact of storm damage.
D	In the medium term	Increased availability of on-line resources and training. Training and messaging on accessing and utilising these resources will be required. Exercising will resume; funding restrictions are likely to limit overall exercising Group activities to support and retain new members will be essential. Revamp of education material to reflect pandemic response operating procedures. Limitations on international travel, and associated RCCNZ support and activities in the Pacific. Pacific nations also dealing with the impact of storm damage.
E	In the medium to long term	Stabilisation of new normal

vii. SAR Prevention

- How might the consequences of Covid-19 impact on SAR prevention activity?
    - Target audiences?
    - Messages?
    - Delivery channels?

A	During the period of lockdown	Effective distribution and acceptance of ‘no recreation’ messaging.

B	For the first 0- 3 months post lockdown	Domestic recreators only. Social distancing rules may make direct prevention messaging difficult to deliver The desire to 'break free' from lockdown is likely to make any prevention messaging difficult to accept. People will be getting out from weeks of direct messaging, and are likely to reject central messaging. More consolidated messaging at high levels on self responsibility necessary as people do things they are not used to doing and take unforeseen risks. Development and provision of information to the public on how to engage with SAR in an operational response, in relation to current alert level. Messaging to 'check equipment and prepare appropriately'. Opportunity to finalise and launch Outdoor Safety Code.
C	3 – 9 months post lockdown	More consolidated messaging at high levels on self responsibility necessary as people do things they are not used to doing and take unforeseen risks Domestic recreators only; may see the start of trans-Tasman inbound tourism. Activity by individuals is likely to be independently organised, away from clubs or commercial ventures. Messaging will need to be targeted to reach the individuals and the nature of their activities. Development and provision of information to the public on how to engage with SAR in an operational response, in relation to current alert level. Messaging to 'check equipment and prepare appropriately'.
D	In the medium term	People's appetite to accept messaging will be affected by the nature of the government and the social / economic balance being applied to re-establish economic viability. More consolidated messaging at high levels on self responsibility necessary as people do things they are not used to doing and take unforeseen risks The target audience will continue to be the domestic recreator.
E	In the medium to long term	This will see an uptake in tourists, and provide an opportunity to establish strong relationships with a re-emerging tourist industry.

viii. Wider Impacts – across the NZSRR / With international SAR Partners

- How might the consequences of Covid-19 impact non-domestic SAR?
    - Antarctic?
    - Pacific?
    - With international SAR Partners?
    - International SAR engagement and organisations?

A	During the period of lockdown	SAR demand will be primarily associated with environmental events. Restrictions on landing access for NZDF assets in the Pacific may limit P3 search capability during an operation.
B	For the first 0- 3 months post lockdown	International activities within our SAR region while minimal – no cruise ships, few flights – however, commercial fishing and international cargo vessel traffic continues. International SAR response capability remains ongoing; any increase in SAR demand is most likely to be generated by locally-based activities, or fishing. Potential time to strengthen partner relationships . Restrictions on landing access for NZDF assets in the Pacific may limit P3 search capability during an operation. Limitations on international travel, and associated RCCNZ support and activities in the Pacific, and interaction with international counterparts.
C	3 – 9 months post lockdown	Ongoing limited international activities. Commercial fishing and international cargo vessel traffic continues; international SAR response capability remains ongoing; Partner relationships and ongoing engagements can be strengthened. Potential to establish new protocols relating to activities such as cruise ships. Skeleton staffing levels in Antarctica; no helicopter or fixed wing capability Limitations on international travel, and associated RCCNZ support and activities in the Pacific, and interaction with international counterparts
D	In the medium term	Return of cruise ships, increase in international flights, and Antarctic recreation. Skeleton staffing levels in Antarctica; no helicopter or fixed wing capability Limitations on international travel, and associated RCCNZ support and activities in the Pacific, and interaction with international counterparts

ix. Post Covid-19 changes to how we operate

- How might the consequences of Covid-19 change:
    - Sector arrangements?
    - Organisational arrangements
    - Non-operational communication
    - Non-operational meetings/ workshops/ travel?
    - SAR training and exercises

A	During the period of lockdown	Increased inter-agency communication and support; more reliance on web-based interactions.
B	For the first 0- 3 months post lockdown	Potential to become internally focussed. Opportunity exists to strengthen 'one SAR' through regular discussions and sharing of ideas and initiatives. More reliance on national level coordination and robust communication. Funding required to meet PPE and associated pandemic training and support costs. Increased use of web and video conferencing.
C	3 – 9 months post lockdown	Strong demand for internal focus. However, this is also a time to establish ongoing cross agency procedures and to align resources and strategies. This could be incorporated with FED funding initiatives

4. Assessment of the potential impacts on SAR funding sources

It is likely that the economic impacts from Covid-19 will affect a range of funding sources currently relied on by the search and rescue sector.

Funding Source	Recessionary Effects	Sector Impact
Lotteries Grants Board (LGB)	• Lottery expenditure in 2020, and potentially into 2021, is reduced • LGB funds available for distribution in 2021 and 2022 are reduced • Increased competition for the available funds	LGB funding is distributed to national bodies, supporting activities coordinated by the national body.
Class Four Gaming:	• The lockdown limitations have reduced access to gaming premises. • Available funds for distribution are reduced. • Increased competition for the available funds	Funds from Gaming are distributed at the local club / unit / group level. The greater the reliance on this funding source, the greater the impact. Slow recovery to pre-Covid levels.
Sponsorship	• Many businesses will face financial hardship, and some will cease to operate. • Funding via sponsorship will be reduced. • Increased competition for the available funds	Sponsorship provides significant financial support across both national and local unit levels. Sponsorship from any organisation associated with tourism is likely to cease and take some time to re-establish; hospitably sector businesses will be similar. Sponsorship from smaller local businesses is likely to be reduced, and cease for any business that closes or is heavily impacted by the recession New sources of sponsorship will take some time to re-establish. Slow recovery to pre-Covid levels.
Fundraising Events – national and local	• Alert level restrictions prevent many events being undertaken. • Recessionary impacts will reduce the disposable income people have to spend on such events.	These events provide significant funding. Effects will be immediate and into 2021.
Community Trusts	• Available funds for distribution are reduced. • Increased competition for the available funds	Reduced access to funds, primarily at local unit level. Slow recovery to pre-Covid levels.
Donations	• The number of donation sources is likely to reduce; • the size of individual donations is also likely to reduce	Reduced access to funds, primarily at local unit level. Slow recovery to pre-Covid levels.
Membership	• Some short-term loss in membership due to recessionary impacts.	New memberships will offset initial losses.

Agency-Specific financial risk vectors

- Coastguard – Lotteries, donations, community trusts, its own lottery, commercial sponsorship
- SLSNZ – Commercial sponsorship, Class 4 gaming, lotteries
- AREC – Nil
- LandSAR – Lotteries, community trusts, class 4 gaming (modest)
- Helicopters – reduction in tourism