



**MINISTRY OF BUSINESS,  
INNOVATION & EMPLOYMENT**  
HĪKINA WHAKATUTUKI



Tourism Evidence  
and Insights Centre

# Tourism Recovery Insights

8 November 2022 data pack

See the interactive web version at

<https://teic.mbie.govt.nz/teiccategories/resources/2022/11/08/tourism-recovery-insights/>

# This data pack is compiled from many sources

The [Tourism Recovery Dashboard](#) (TRD) gives a live snapshot of the latest tourism data

Dataset	Purpose	Sources	Latest data
Daily border crossings	Based solely on border crossings into and out of New Zealand. These data do not incorporate arrival card information so no breakdown of traveler type.	<a href="#">Stats NZ</a>	30 Oct 22
Weekly visitor arrivals	Short-term overseas visitor data from arrival card information. These data have a greater delay due to the manual process of scanning these cards and being initially diverted to the Ministry of Health for the purpose of COVID-19 management and mitigation.	<a href="#">Stats NZ</a>	16 Oct 22
Operating Airline capacity	Estimated operating airline capacity for the year of 2022 from Sabre, indicating the capacity airlines intend to make available.	<a href="#">Sabre</a>	Forecasts to Apr-2023
Weekly consumer spend data	Uses electronic card data as indicator of change in expenditure patterns in the economy	<a href="#">MBIE</a>	30 Oct 22
Working holiday scheme visa information	Monthly working holiday visa scheme approval and arrivals.	Immigration NZ	Oct 22

# Summary

## Overall weekly **border arrivals** continue to increase

- Border arrivals totalled at 86,900 in the last week of Oct.
- Weekly arrivals to Queenstown were above 2019 levels in the second half of Oct 2022.

## Weekly Australian **visitor arrivals** fall as school holidays end

- Australian visitor arrivals totalled 16,700 in the week-end 16 Oct, down over 10,000 from the end of Sept.
- This resulted in overall visitor arrivals falling from almost 40,000 at the end of Sept to 30,800 in the week-end 16 Oct.

## **Airline capacity** for North America forecasted to be closer to 2019 levels

- Total operating airline capacity estimated to be back to 69% of 2019 levels by end of year.

## Additional 'Special Direction' visas boosted Oct **Working Holiday Scheme (WHS)** visa approvals

- Over 14,000 Special Direction WHS visa applications were approved in Oct, following 18,000 in March.
- Oct 2022 WHS visa arrivals totalled 4,310, slightly down on Sept figures.
- WHS visa population in New Zealand increased in Oct 2022, but still down 59% on Oct 2019.

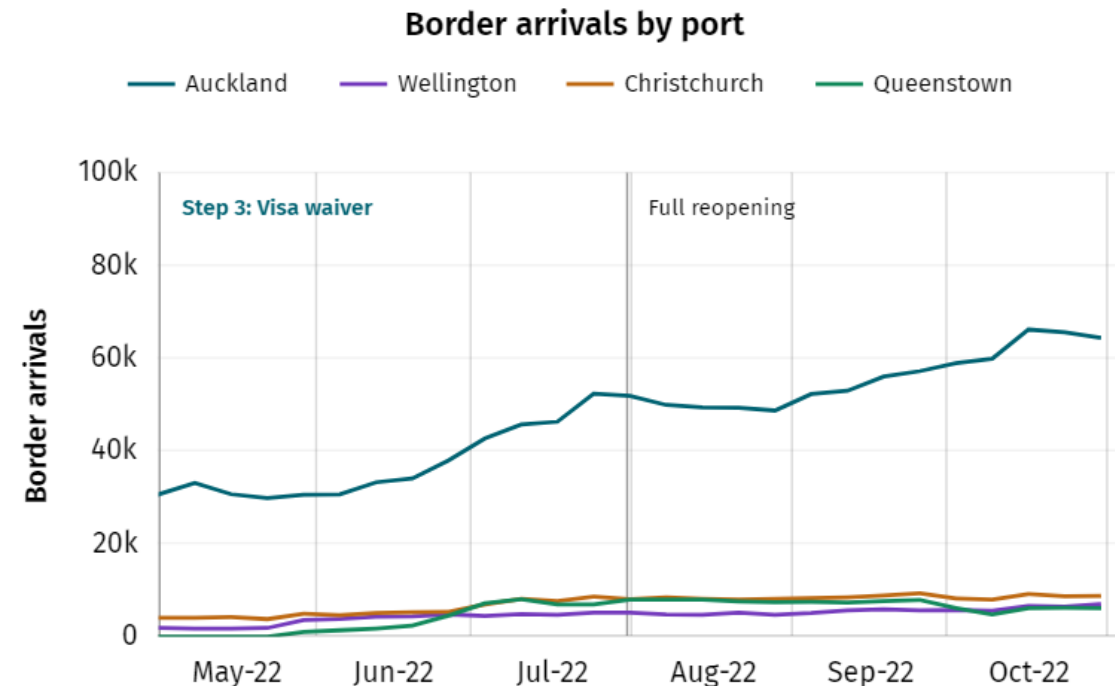
## Other highlights

- Weekly international card spend at the end of Oct 2022, still down 19% on 2019 levels.
- International spend in regions more reliant on international tourism is tracking below the national average rate of change.

# Overall border arrivals continue to increase, arrivals to Queenstown above 2019 levels

- Overall border arrivals<sup>1</sup> to NZ reached **86,900** in the week-ended 30 Oct, down 38% on the same week in 2019.
- Of the overall border arrivals, 44,100 were non-New Zealand Citizens (51%).
- Arrival figures have steadily increased for each airport, with Queenstown up 9% in the week-ended 30 Oct compared with 2019.

Week-ended 30 Oct 2022 <sup>2</sup>	Border arrivals	Change vs same week in 2019
Auckland Airport	64,600	-39%
Christchurch Airport	8,900	-49%
Wellington Airport	7,100	-31%
Queenstown Airport	6,200	9%



Source: StatsNZ. Last updated on 2022-11-02.  
 From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

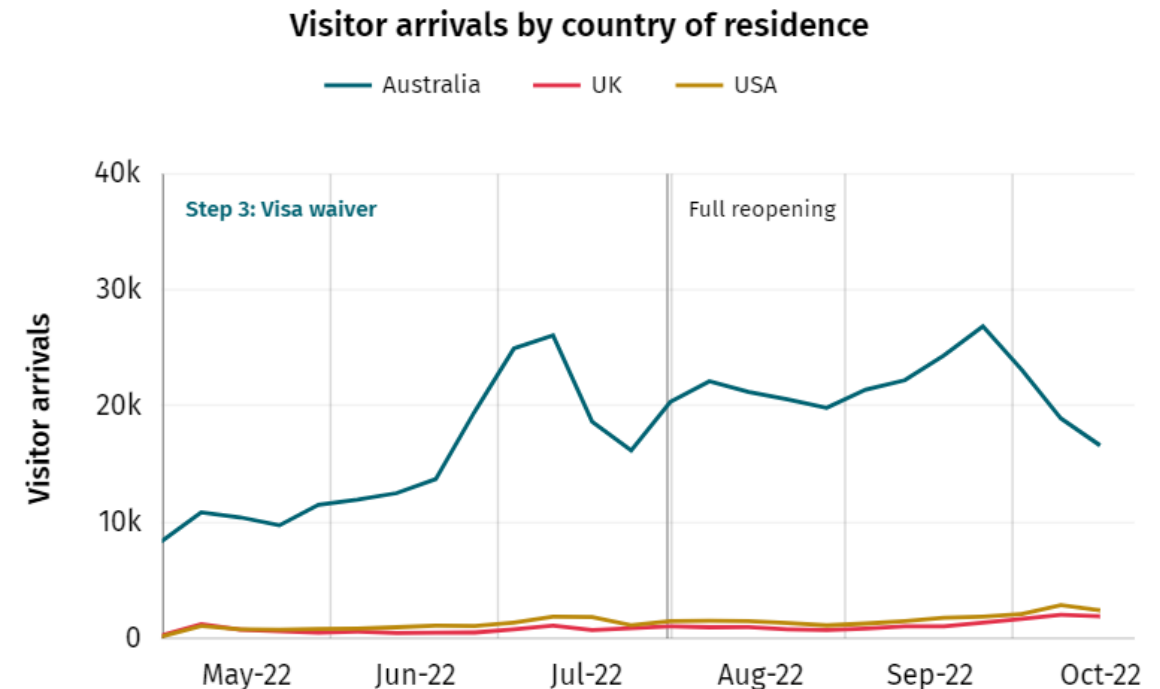
<sup>1</sup> Overall border arrivals counts everyone that crosses the border into New Zealand: New Zealand citizens as well as non-New Zealand citizens.

<sup>2</sup> Arrivals to other airports not included in this table n =100

# Australian visitor arrivals fall as school holidays end

- In the week-ended 16 Oct, there were **30,800** international visitor arrivals<sup>1</sup>, 53% of 2019's level. This figure was down from the 40,000 peak at the end of September.
- The major driver of this was a fall in Australian arrivals, down to 16,700 in the week-ended 16 Oct, from a high of 27,000 the end of September.
- These falls were due to school holidays in Australia ending, after they began at the end of September.

Week-ended 16 Oct 2022	Visitor arrivals	Change vs same week in 2019
Australia	16,700	-41%
USA	2,500	-55%
UK	2,000	-41%



Source: StatsNZ. Last updated on 2022-11-02.  
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

<sup>1</sup> International visitor arrivals includes NZ citizens not resident in New Zealand as well as non-New Zealand citizens.

# Number of holiday visitor arrivals continue to exceed VFR arrivals

- International visitor arrivals<sup>1</sup> to NZ for the purpose of a holiday fell to **12,300** in the week-ended 16 Oct, after they peaked at the end of September in the Australian school holidays.
- This figure continues to be greater than the **10,100** that arrived to visit friends and relatives.



Source: StatsNZ. Last updated on 2022-11-02.  
 From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

Week-ended 16 Oct 2022	Visitor arrivals	Change vs same week in 2019
Holiday/vacation	12,300	-61%
Visit friends/relatives	10,100	-40%
Business	4,200	-59%

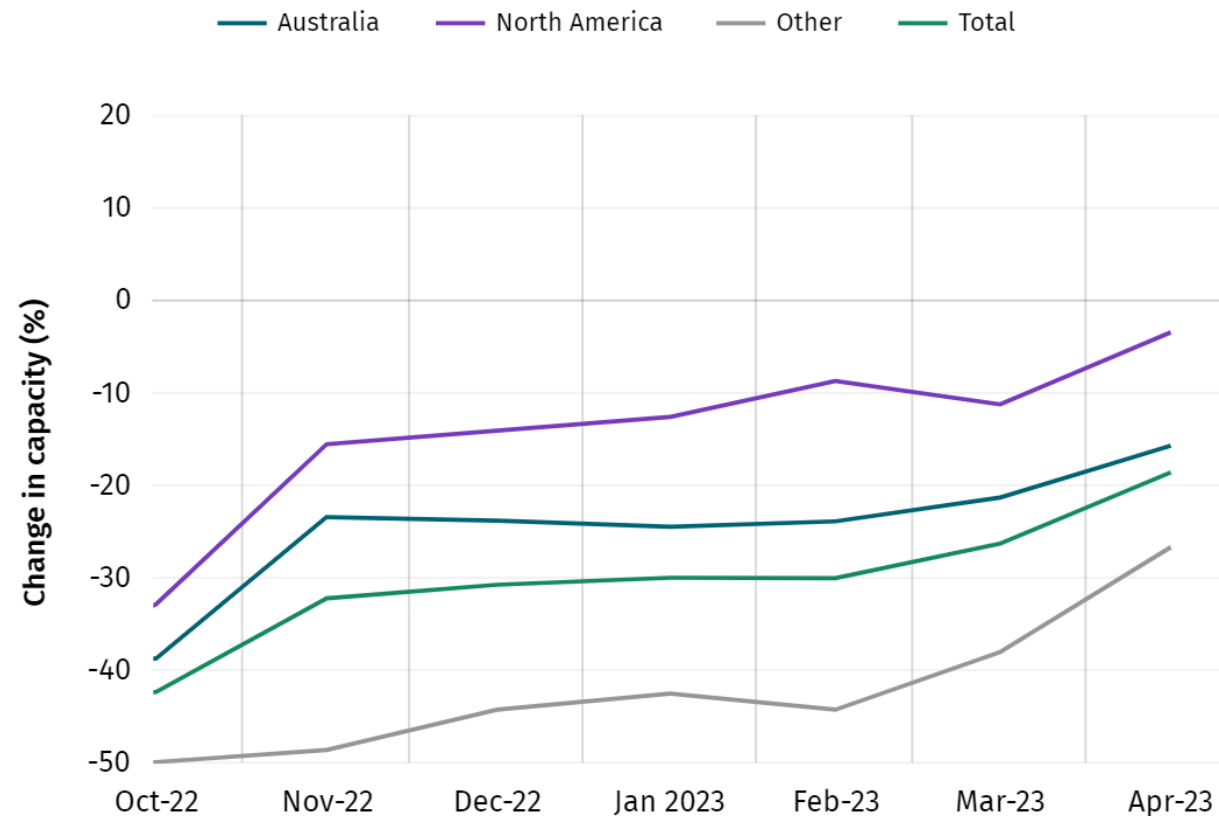
<sup>1</sup> International visitor arrivals includes NZ citizens not resident in New Zealand as well as non-New Zealand citizens.

# Operating airline capacity up to 69% of 2019's level by the end of 2022

- By the end of 2022, total operating airline capacity<sup>1,2</sup> for international arrivals to New Zealand is estimated to grow to 69% of 2019 levels.
- North American airline capacity is expected to continue recovering to pre-COVID-19 levels faster than other regions through to the end of the year. This recovery is boosted by new flight routes from Dallas and New York.

Total airline capacity (% change on 2019 levels)	Australia	North America	Total
Oct-22	-39%	-33%	-42%
Nov-22	-23%	-15%	-32%
Dec-22	-24%	-14%	-31%
Jan-23	-24%	-12%	-30%
Feb-23	-24%	-9%	-30%
Mar-23	-21%	-11%	-26%
Apr-23	-16%	-3%	-18%

Change in international arrival flight capacity by origin vs 2019



Source: Sabre Market Intelligence. Last updated on 2022-11-02.  
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

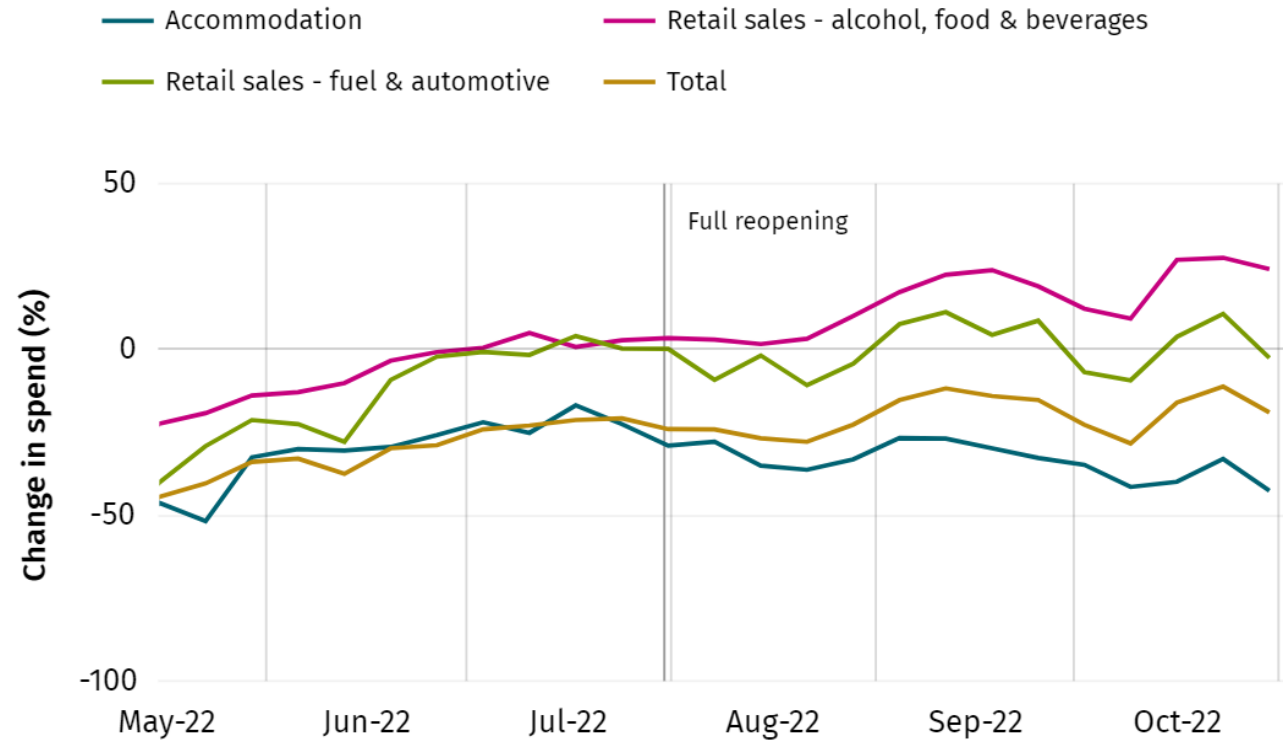
1 Estimates are sourced from Sabre and are subject to change

2 Capacity does not equate to arrivals

# International electronic card transaction (ECT) spend still down 19%

- International ECT<sup>1,2,3</sup> spend in NZ in the week-ended 30 Oct was down 19% compared to the same week in 2019.
- Spend in the industries 'food and liquor' (up 25% in the latest week) and 'fuel and automotive' (down 2%) have been closest to 2019 levels over the past couple of months.
- Spend figures have not been adjusted for inflation (the rate of increase in prices over a given period). Therefore, spend figures are expected to be closer to 2019 levels than arrival figures which aren't adjusted.

Change in intl ECT spend by industry vs 2019



Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-10-30.  
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

1 International ECT spend is based on the origin of the card, not the consumer. Spend from NZ-residents on international cards will count as international spend

2 ECT spend figures are estimates and are subject to revisions

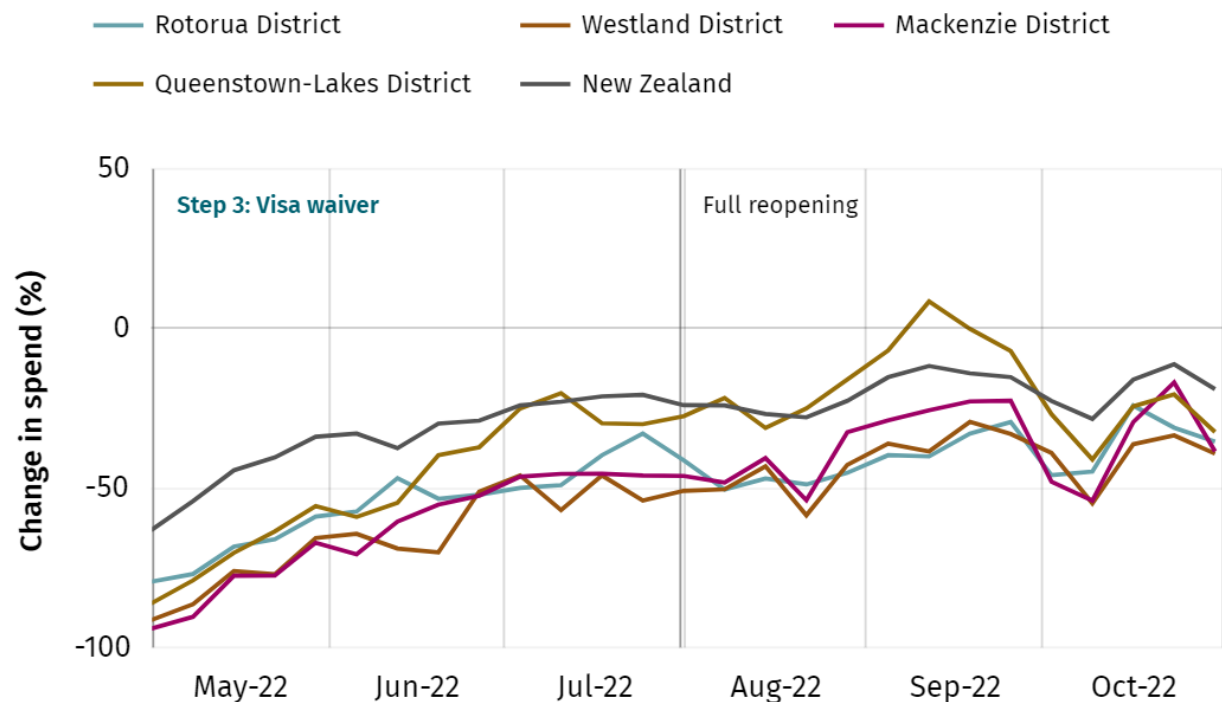
3 Weekly ECT figures are more volatile than monthly spend figures



# Spend in regions more reliant on international tourism is still below the national average

- International electronic card transaction (ECT)<sup>1, 2, 3</sup> spend in regions that are more reliant on international tourism is still below the average weekly spend for all New Zealand (down 19% in the latest week).
- This gap has been shrinking, likely due to holiday visitors making up a larger proportion of arrivals. Holiday visitors are more likely to participate in and spend on traditional tourism activities.
- A strong ski season in Queenstown resulted in international spend hovering around the national average up until the end of winter, but has dropped below the national average again in Oct.

Change in intl ECT spend by TA vs 2019



Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-10-30.  
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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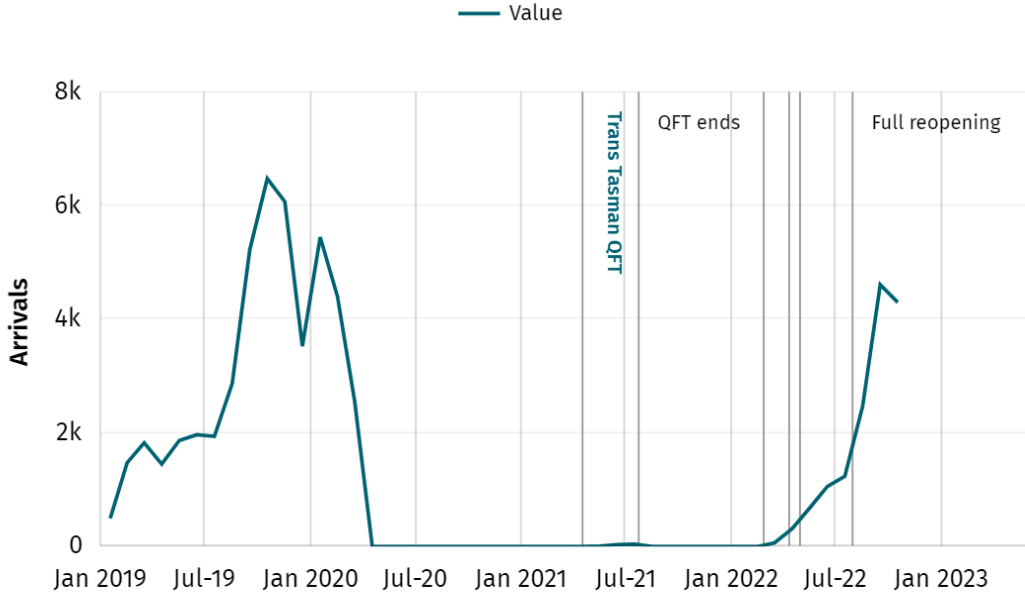
2 ECT spend figures are estimates and are subject to revisions

3 Weekly ECT figures are more volatile than monthly spend figures

# October Working Holiday Scheme (WHS) visa arrivals down a third on 2019 levels

- WHS visa arrivals<sup>1</sup> totalled 4,310 in Oct 2022, similar to the number seen in September (4,620).
- Compared to pre-COVID levels, WHS visa arrivals are down 33% on the 6,490 that arrived in Oct 2019.
- WHS visa arrivals for 2022 up until the end of October totalled 14,760.
- The increase in WHS visa arrivals was driven by arrivals from Europe, with the Germany topping the list in Oct 2022 at 970 arrivals.

Working Holiday Scheme visa holder arrivals



Source: Immigration NZ. Last updated on 2022-11-01 22:00:00.  
 From <https://teic.mbie.govt.nz/teiccategories/databreleases/tourismRecoveryDashboard/>

Country	Oct WHS visa arrivals
Germany	970
UK	880
France	705
Ireland	230
US	210
Other	1310

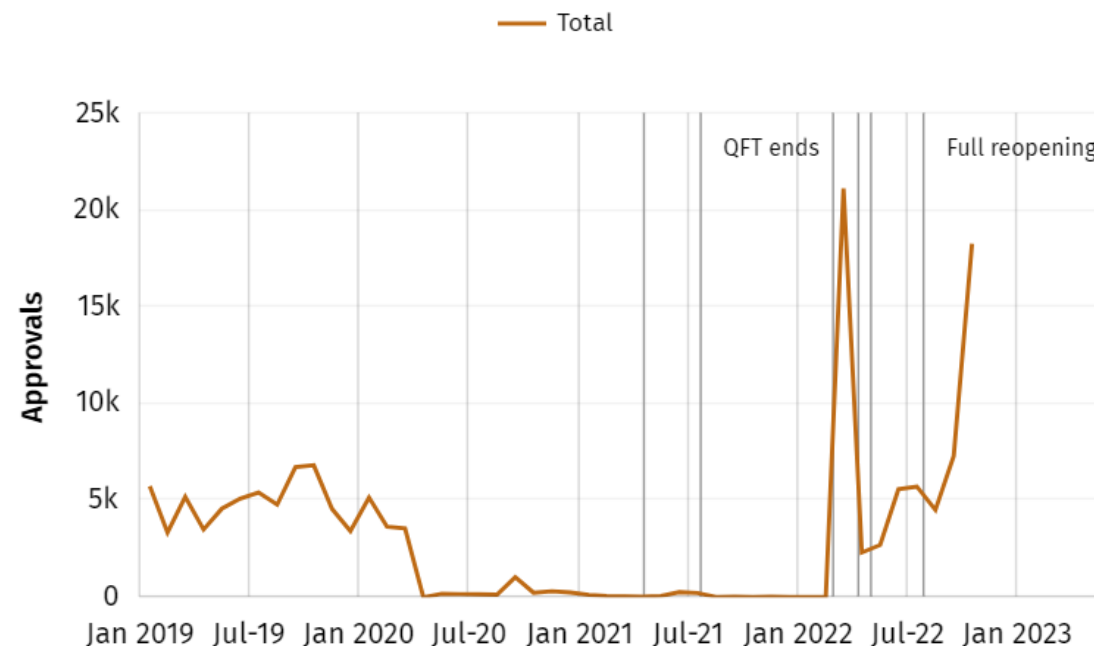
<sup>1</sup>These figures only represent first time arrivals only. Repeat visitors and visa extensions are not included.

# October WHS visa approvals boosted by 'Special Direction' types

- Working Holiday Scheme (WHS) visa approvals increased to 18,290 in Oct 2022.
- This large increase was due to a further 14,200 Special Direction WHS visas<sup>1</sup> being approved in Oct, after 18,000 were approved in March.
- In comparison, approvals that were not Special Direction fell from 7,300 in Sept to 4,090 in Oct.
- This resulted in approvals for Oct 2022 almost tripling those in Oct 2019, showing good potential for arrivals for the summer season.
- The large figure for Mar 2022 was due to WHS Special Direction visas being granted automatically<sup>1</sup>.

<sup>1</sup> Special Direction visas were granted automatically for Working Holiday visa holders who were offshore with un-used and expired Working Holiday Visas during the COVID-19 pandemic. They did not need to apply.

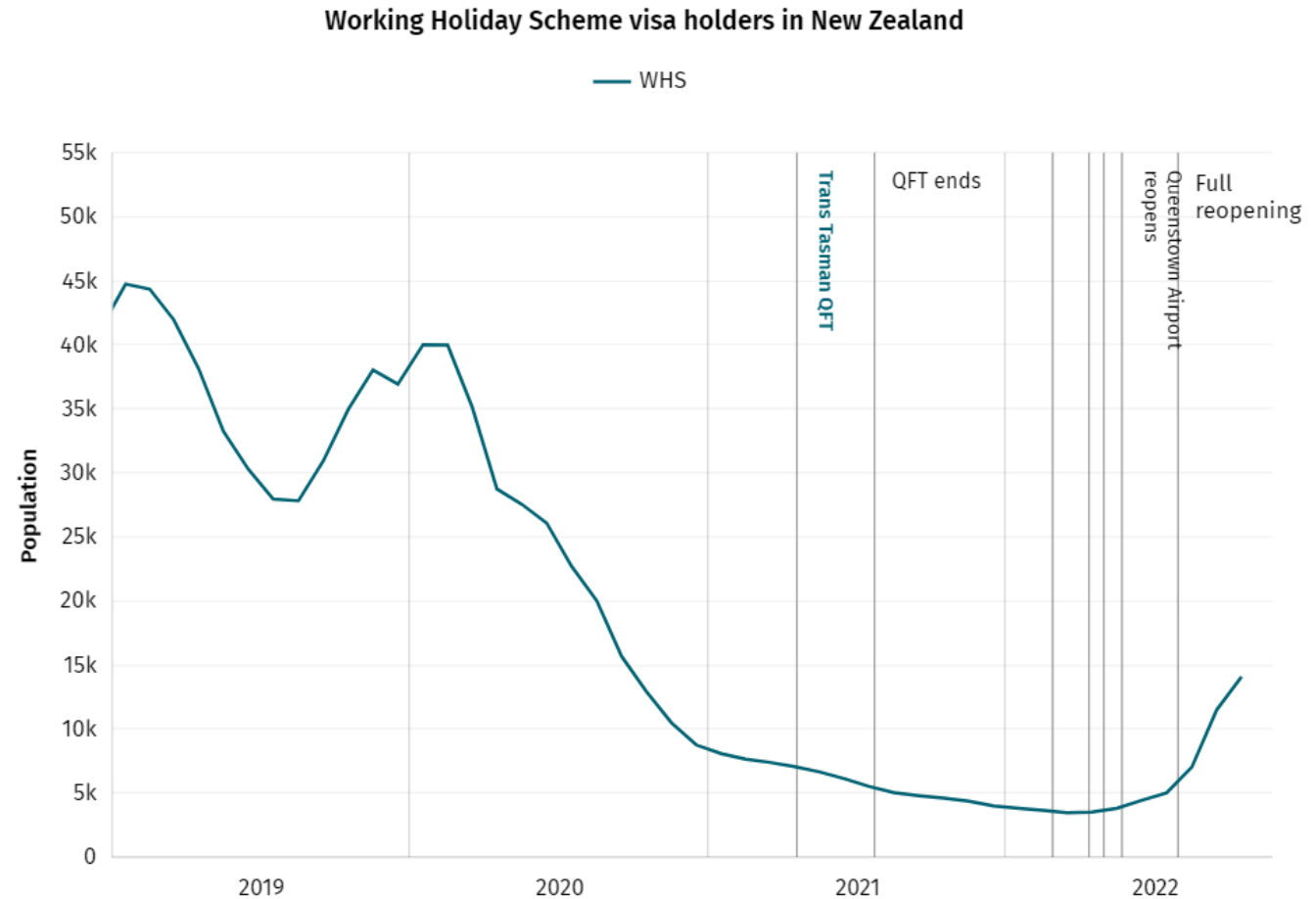
Working Holiday Scheme visa application approvals



Source: Immigration NZ. Last updated on 2022-11-01 22:00:00.  
From <https://teic.mbie.govt.nz/teiccategories/databreleases/tourismRecoveryDashboard/>

# WHS visa population in New Zealand increased in Oct 2022, but still down 59% on Oct 2019

- Working Holiday Scheme (WHS) visa holders in New Zealand increased to 14,140 by the end of Oct 2022.
- Although WHS visa holders have increased, the current figure is still down 59% on the 35,000 in the country at the end of Oct 2019.



Source: Migration Data Explorer (MBIE). Last updated on 2022-11-09.  
From <https://teic.mbie.govt.nz/teiccategories/resources/2022/11/08/tourism-recovery-insights/>

# Explore and interact with the data on the



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<https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

## Contact us

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