



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



Tourism Evidence
and Insights Centre

Tourism Recovery Insights

12 September 2022 data pack



This data pack is compiled from many sources

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

Data	Purpose	Sources	Latest data	Internal only / in confidence
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.	Stats NZ	4 Sep 22	No
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.	Stats NZ	21 Aug 22	No
Operating Airline capacity	Estimated operating airline capacity for the year of 2022 from Sabre, indicating the capacity airlines intend to make available.	Sabre	Forecasts to Feb-2023	No
Weekly consumer spend data	Uses electronic card data as indicator of change in expenditure patterns in the economy	MBIE	4 Sep 22	No
Working holiday scheme visa information	Data on visa applications to Immigration NZ since the start of Reconnecting New Zealand on 14 March 2022. For tourism, we report on Working Holiday Scheme applications, arrivals, and total visa holders to understand migrant labour available to the sector.	Immigration NZ, Migration Data Explorer (MBIE)	6 Sep 22	No

Summary

Queenstown showing strong **border arrivals**, boosted by ski season

- Strong ski season has lifted arrivals to Queenstown to around 90% of the same period in 2019. This is higher than other New Zealand regions for the same period

Holiday **visitor arrivals** continue to exceed those coming for family and friends

- Australian visitor arrivals around 80% of the 2019 level in August, although this is the low season

Airline capacity for North America **forecasted** to be closer to 2019 levels than Australia by Nov

- Operating airline capacity estimated to be back to 73% of 2019 levels by end of year

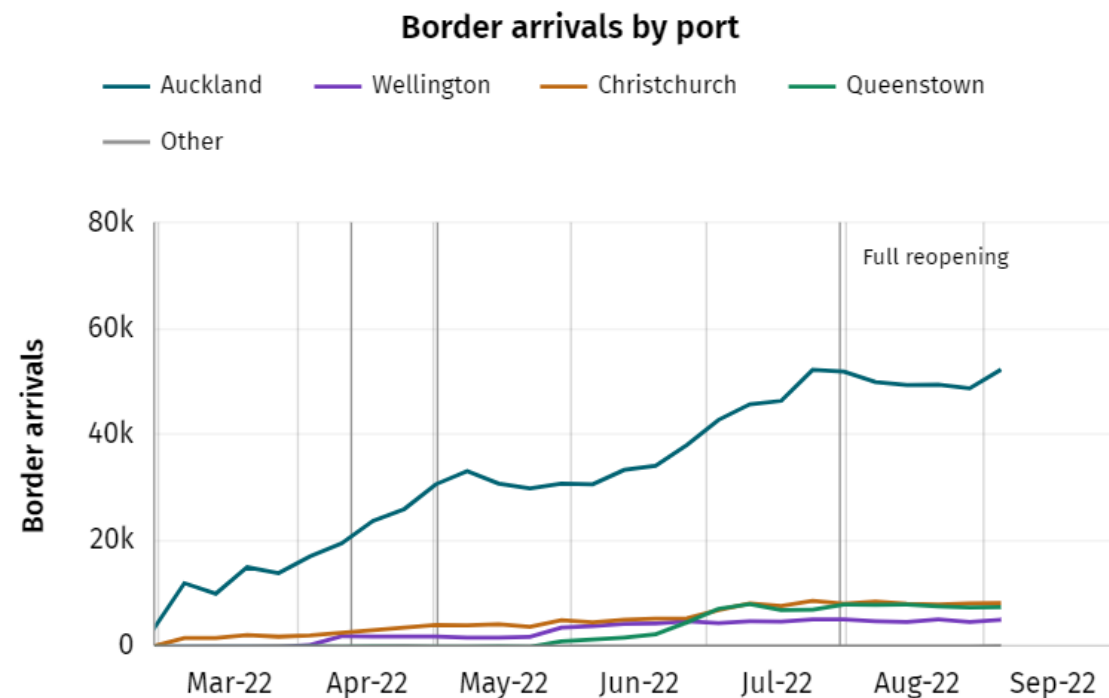
Other highlights

- **Working Holiday Scheme (WHS)** visa arrivals up to 6,700 since March 2022
- Monthly Working Holiday Scheme visa approvals are **tracking close to 2019 levels**
- International card spend **still down 19% on 2019 levels** despite high inflation
- International spend in regions more reliant on international tourism is **tracking below the national average** rate of change

*Current figures are therefore likely to be more volatile due to a lower baseline during the low season this winter.

Queenstown showing strong border arrivals in August, boosted by ski season

- Overall border arrivals¹ to NZ totalled 73,400 in the week-ended 4 Sep, down 38% on the same week in 2019. Of these, 34,100 were non-NZers.
- A strong ski season has lifted arrivals to Queenstown to around 90% of 2019 levels. This is higher than other NZ regions for the same period.
- However, the majority of border arrivals in the latest week were to Auckland (71%).
- Comparative figures are likely to be more volatile due to a lower baseline during this season.



Source: StatsNZ. Last updated on 2022-09-07.
 From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

Week-ended 4 Sep 2022	Border arrivals	Change vs same week in 2019
Auckland	52,400	-40%
Christchurch	8,300	-42%
Queenstown	7,500	-9%
Wellington	5,100	-41%

¹ Overall border arrivals includes New Zealand citizens as well as non-New Zealand citizens.

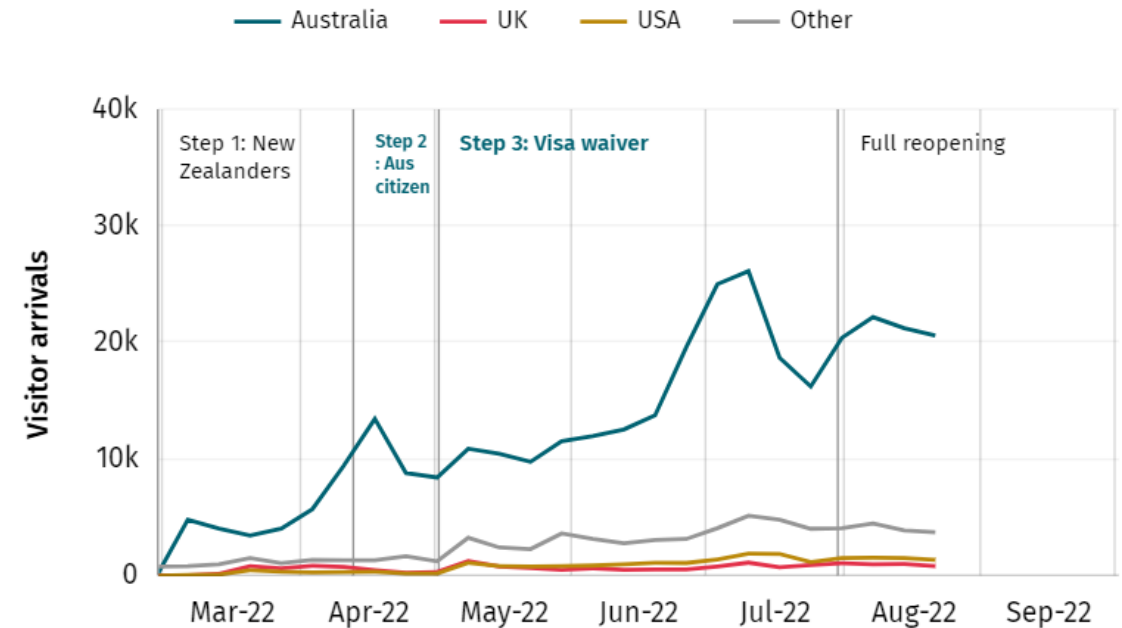
Australian visitor arrivals around 80% of the 2019 level in mid-August

- In the week-ended 21 August, there were **28,800** international visitor arrivals¹, 57% of 2019's level.
- Australian visitor arrivals totalled **20,700** in the same week, 80% of 2019's level.
- Since the full border reopening on 1 August, arrival numbers outside NZ's main three markets (Australia, the US and the UK) have yet to ramp up.
- Arrivals from China, Japan and Germany were down 93%, 75% and 68%, respectively.

Week-ended 21 Aug 2022	Visitor arrivals	Change vs same week in 2019
Australia	20,700	-20%
USA	1,400	-52%
UK	900	-43%

Australia	20,700	-20%
USA	1,400	-52%
UK	900	-43%

Visitor arrivals by country of residence



Source: StatsNZ. Last updated on 2022-09-07.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

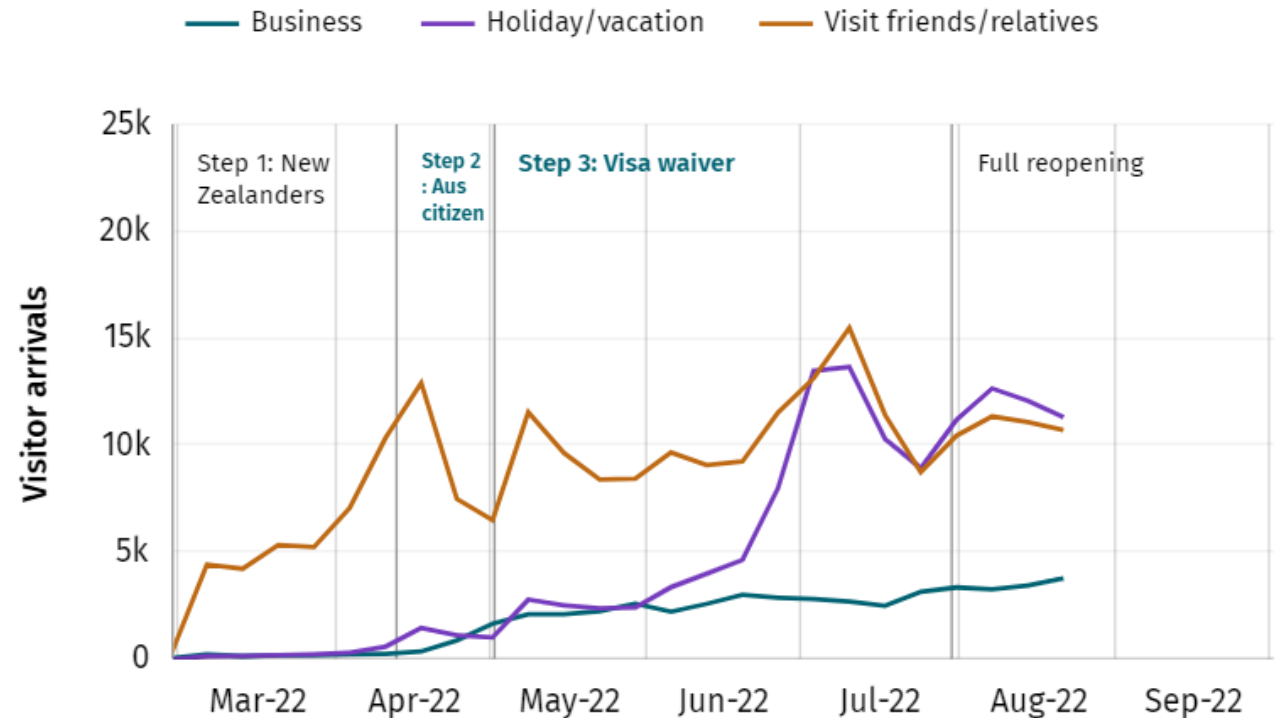
¹ International visitor arrivals includes NZ citizens not resident in New Zealand as well as non-New Zealand citizens.

Number of holiday visitor arrivals continue to exceed VFR arrivals

- International visitor arrivals¹ to NZ for a holiday reached **11,300** in the week-ended 21 August.
- This figure continue to be greater than the **10,700** that arrived to visit friends and relatives.
- The number of VFR visitor arrivals was down only 14% on 2019 levels.

	Visitor arrivals in week-ended 21 Aug 2022	Change vs same week in 2019
Holiday/vacation	11,300	-49%
Visit friend/relatives	10,700	-14%
Business	3,800	-62%

Visitor arrivals by purpose of travel



Source: StatsNZ. Last updated on 2022-09-07.
 From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

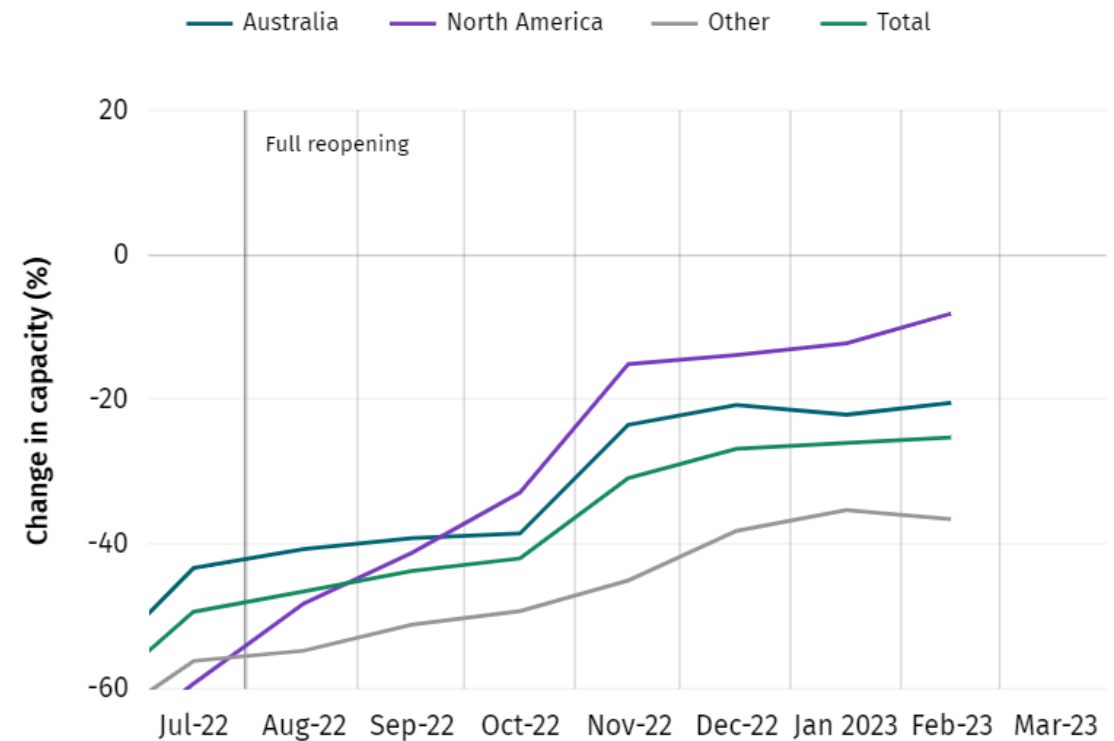
¹ International visitor arrivals includes New Zealand citizens as well as non-New Zealand citizens.

Operating airline capacity up to 73% of 2019's level by end of year

- By the end of the year, total operating airline capacity is estimated to grow to 73% of 2019 levels.
- Estimated operating airline capacity^{1,2} in September and October remains similar to August's level.
- North American airline capacity is forecasted to return closest to 2019 levels by November, boosted by increased frequency of flights, and the return of some flight paths.

Total capacity (% change on 2019 levels)	Australia	North America	Other	Total
Jul-22	-43%	-59%	-56%	-49%
Aug-22	-41%	-48%	-55%	-46%
Sep-22	-39%	-41%	-51%	-44%
Oct-22	-38%	-32%	-49%	-42%
Nov-22	-23%	-8%	-45%	-30%
Dec-22	-21%	-14%	-39%	-27%
Jan-23	-22%	-13%	-35%	-26%
Feb-23	-20%	-9%	-36%	-25%

Change in international arrival flight capacity by area vs 2019



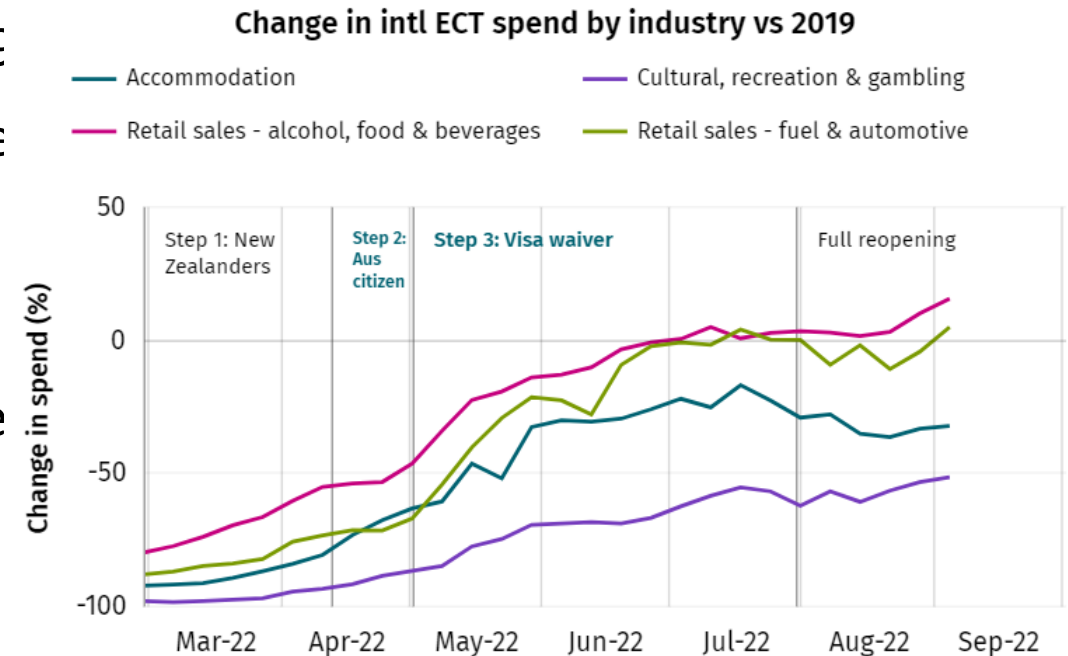
Source: Sabre Market Intelligence. Last updated on 2022-09-07.
From <https://teic.mbie.govt.nz/teiccategories/databreleases/tourismRecoveryDashboard/>

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% despite high inflation

- International ECT^{1,2,3} spend in NZ in the week-ended 4 Sep was down 19% compared to the same week in 2019
- Spend in the industries 'food and liquor' (up 16% in the latest week) and 'fuel and automotive' (up 5%) 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), so they are expected to be closer to 2019 levels than arrival figures.
- Current spend figures are from the low season, and therefore comparative figures from 2019 are likely to be more volatile.

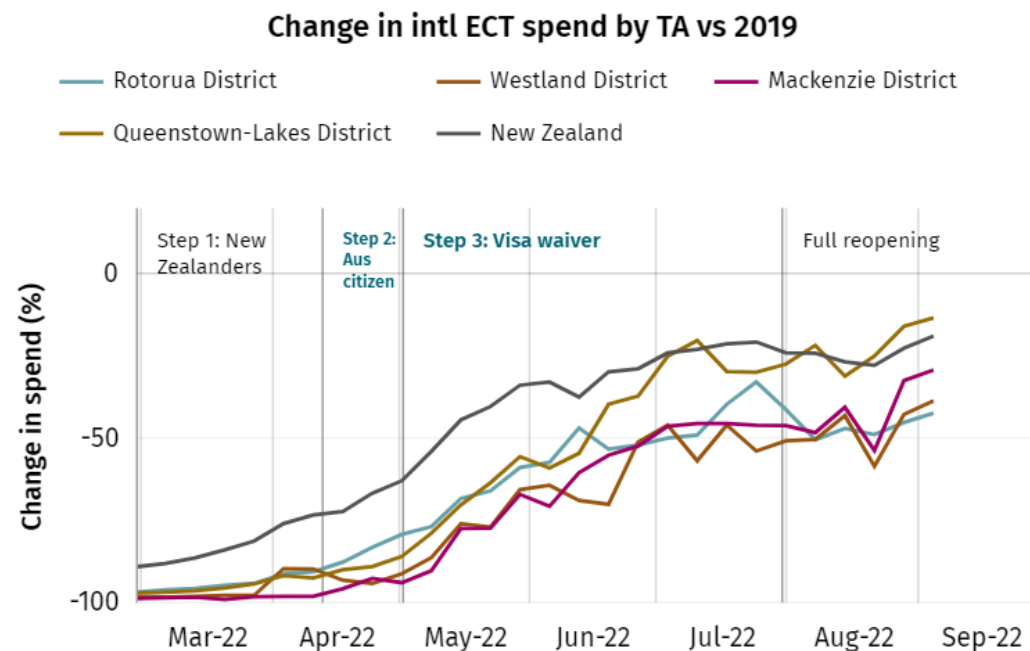


Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-09-04.
From <https://teic.mbie.govt.nz/teiccategories/databreleases/tourismRecoveryDashboard/>

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)^{1, 2, 3} spend in regions more reliant on international tourism is still below the national average change on 2019's level (down 19% in the latest week).
- A strong ski season in Queenstown resulted in international spend hovering around the national average change on 2019's level, down 13% in the latest week.
- This trend was mainly driven by a larger proportion of arrivals visiting family and relatives (VFR) since the border reopened. VFR visitors are more likely to visit higher population areas (such as Auckland) and less likely to participate and spend in traditional tourism activities.



Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-09-04.
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Working Holiday Scheme (WHS) visa arrivals total 6,700 since March

- As at 6 Sep 2022, 6,700 people had arrived in New Zealand on a WHS visa since applications started again in mid-March.
- Immigration NZ has approved 24,000 applications, with a further 18,050 automatically granted due to un-used and expired WHS visas from COVID-19.
- The UK tops the number of offshore approvals, followed by France and Germany.
- Recent Government announcements have boosted potential future WHS visa holder numbers in New Zealand, including doubling the 2022/23 cap and extending WHS visas expiring between 26 August 2022 and 31 May 2023 by 6 months.

Working Holiday Scheme (WHS)	Offshore	Onshore	Total	WHS – Special Direction ¹	Grand Total
Applications received	25,690	470	26,160		
Applications approved	23,680	320	24,000	18,050	42,050
Arrivals			4,625	2,074	6,699

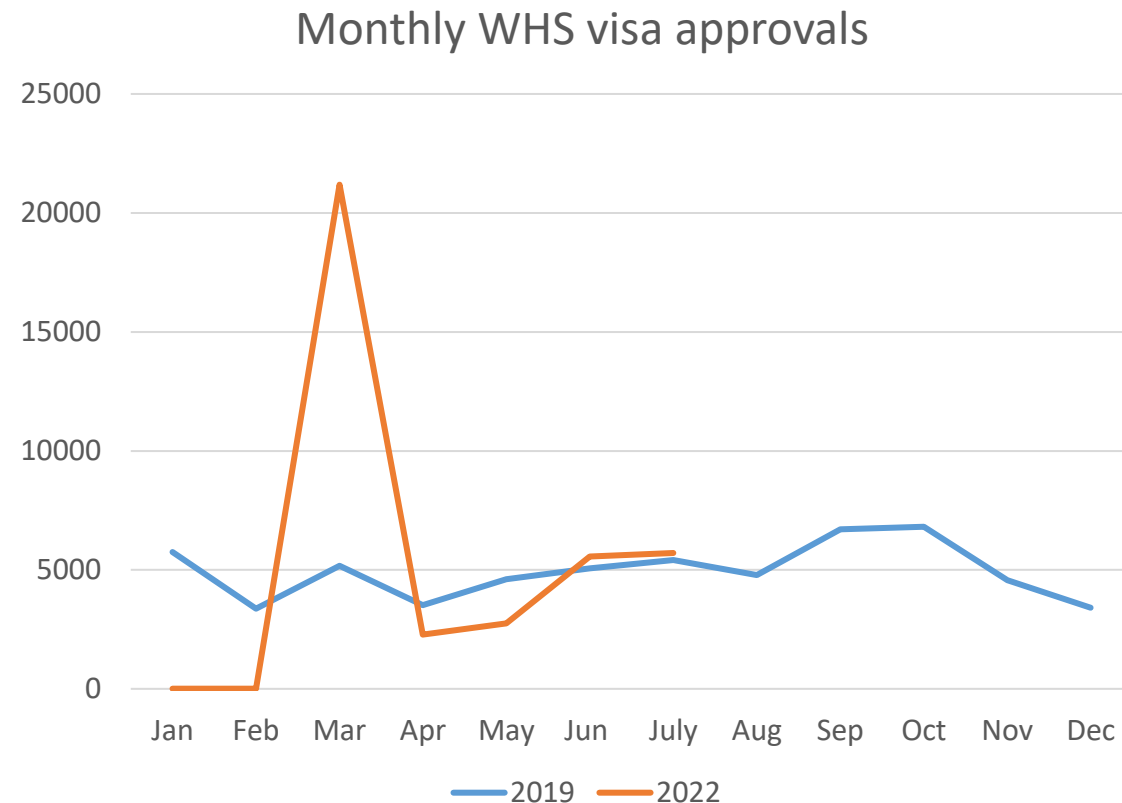
Offshore applications approved	
UK	3,580
France	2,860
Germany	2,820
US	1,820

¹ 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. Recipients were granted a visa automatically and did not need to apply.

Figures in these tables are rounded to the nearest 10. Totals may not add together properly as a result.

Monthly Working Holiday Scheme (WHS) visa approvals are tracking close to 2019 levels

- WHS visa approvals were very similar for June and July 2022 when compared with the same months in 2019.
- WHS visa approvals tended to peak towards the end of each year pre-COVID-19.
- The large figure for March 2022 was due to WHS Special Direction visas being granted automatically¹.



¹ 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. Recipients were granted a visa automatically and did not need to apply

Explore and interact with the data on the



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