



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



Tourism Evidence
and Insights Centre

Tourism Recovery Insights

18 October 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
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	9 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.	Stats NZ	25 Sep 22
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 Mar-2023
Weekly consumer spend data	Uses electronic card data as indicator of change in expenditure patterns in the economy	MBIE	9 Oct 22
Working holiday scheme visa information	Monthly working holiday visa scheme approval and arrivals.	Immigration NZ	Sep 22

Summary

Overall **border arrivals** reached another post-COVID record at the end of Sept 2022

- Weekly arrivals peaked at **80,500** in the seven days to 25 Sep, surpassing record levels seen in the winter school holidays.
- Queenstown arrivals starting to decrease in the latest week (9 Oct) as ski season ends, Auckland continues to increase.

Weekly Australian **visitor arrivals** at the end of Sept 2022 at the highest since COVID began

- Australian visitor arrivals totalled 26,900 in the seven days to 25 Sep as their spring school holidays began.
- Spring school holidays sees more holiday travellers than VFR compared to the winter school holidays.

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

- Total operating airline capacity estimated to be back to 73% of 2019 levels by end of year.

September Working Holiday Scheme (WHS) **visa approvals** higher than at any point in 2019

- September Working Holiday Scheme (WHS) visa arrivals totalled 4,620, almost double those in August 2022.

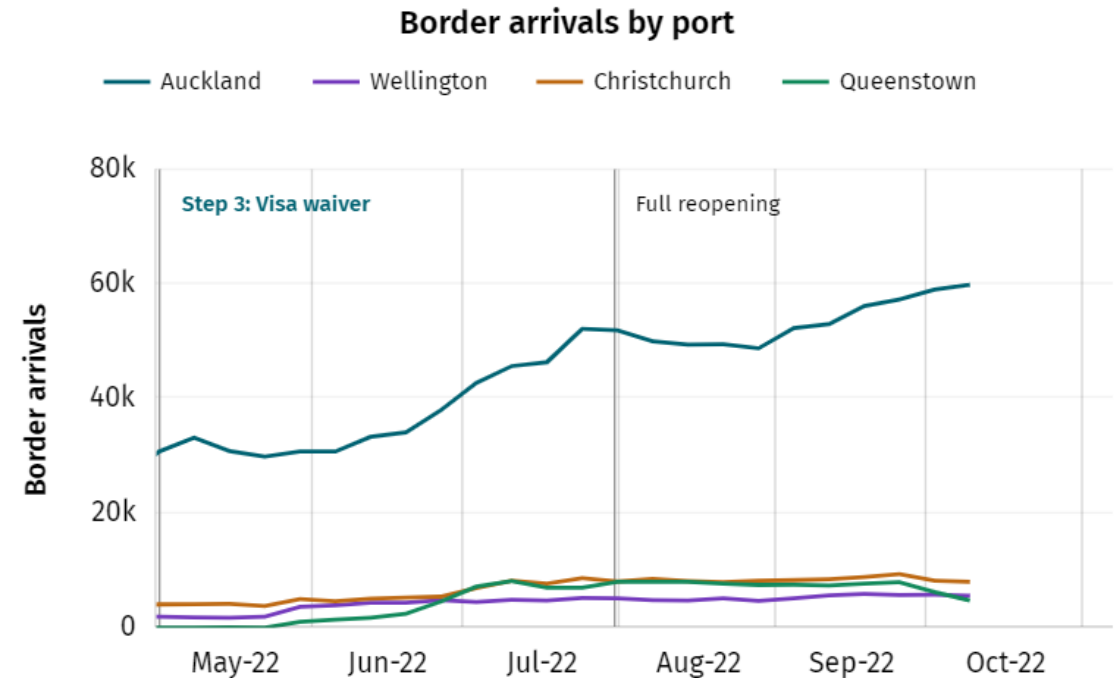
Other highlights

- International card spend **still down 31% on 2019 levels**
 - International spend in regions more reliant on international tourism is **tracking below the national average** rate of change
-

Overall border arrivals reached another post-COVID record

- Overall border arrivals¹ to NZ reached a new post-COVID record at **80,500** in the seven days to 25 Sep, surpassing peak levels seen in the July school holidays.
- In the latest seven days to 9 Oct, this figure was **78,400**, down 44% on 2019's level, dipping as ski season draws to a close.
- In this latest week, arrivals to Queenstown (4,800) dropped below Wellington's (5,600) for the first time since June as winter season comes to a close. On the other hand, arrivals to Auckland increased to 60,000.

Week-ended 9 Oct 2022	Border arrivals	Change vs same week in 2019
Auckland Airport	60,000	-44%
Christchurch Airport	8,000	-54%
Wellington Airport	5,600	-46%
Queenstown Airport	4,800	-29%



Source: StatsNZ. Last updated on 2022-10-12.
 From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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

Australian visitor arrivals trended upwards as their spring school holidays began

- In the seven days to 25 Sep, there were **38,500** international visitor arrivals¹, 57% of 2019's level.
- Over that week, Australian visitor arrivals totalled **26,900**, the highest since COVID began, 74% of 2019's level.
- This was driven by school holiday beginning in QLD and VIC, and had just begun for NSW, ACT and WA (from Saturday 24).

Week-ended 25 Sep 2022	Visitor arrivals	Change vs same week in 2019
Australia	26,900	-26%
USA	2,000	-47%
UK	1,400	-40%



Source: StatsNZ. Last updated on 2022-10-12.
 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 the purpose of a holiday reached **16,500** in the seven days to 25 Sep.
- This figure continues to be greater than the **13,900** that arrived to visit friends and relatives.
- The composition of arrivals is different from what we saw in the July school holidays, where more visited for friends and relatives (14,300/week average) than for a holiday (13,600/week average).



Source: StatsNZ. Last updated on 2022-10-12.
 From <https://teic.mbie.govt.nz/teiccategories/databreleases/tourismRecoveryDashboard/>

Week-ended 25 Sep 2022	Visitor arrivals	Change vs same week in 2019
Holiday/vacation	16,500	-55%
Visit friends/relatives	13,900	-28%
Business	4,300	-45%

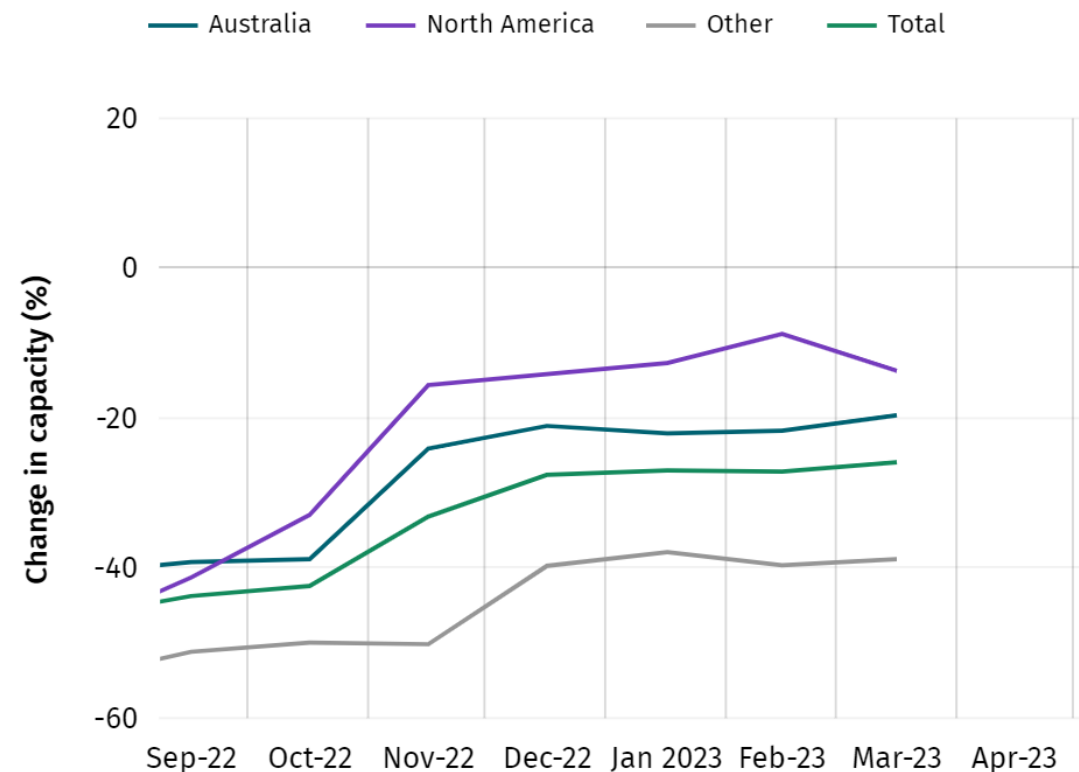
¹ International visitor arrivals includes NZ citizens not resident in New Zealand as well as non-New Zealand citizens.

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

- By the end of the year, total operating airline capacity^{1,2} for international arrivals to New Zealand is estimated to grow to 73% of 2019 levels.
- North American airline capacity is expected to continue recovering to pre-COVID 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 capacity (% change on 2019 levels)	Australia	North America	Total
Oct-22	-39%	-33%	-42%
Nov-22	-24%	-15%	-33%
Dec-22	-21%	-14%	-27%
Jan-23	-22%	-12%	-27%
Feb-23	-22%	-9%	-27%
Mar-23	-19%	-14%	-26%

Change in international arrival flight capacity by origin vs 2019



Source: Sabre Market Intelligence. Last updated on 2022-10-12.
 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

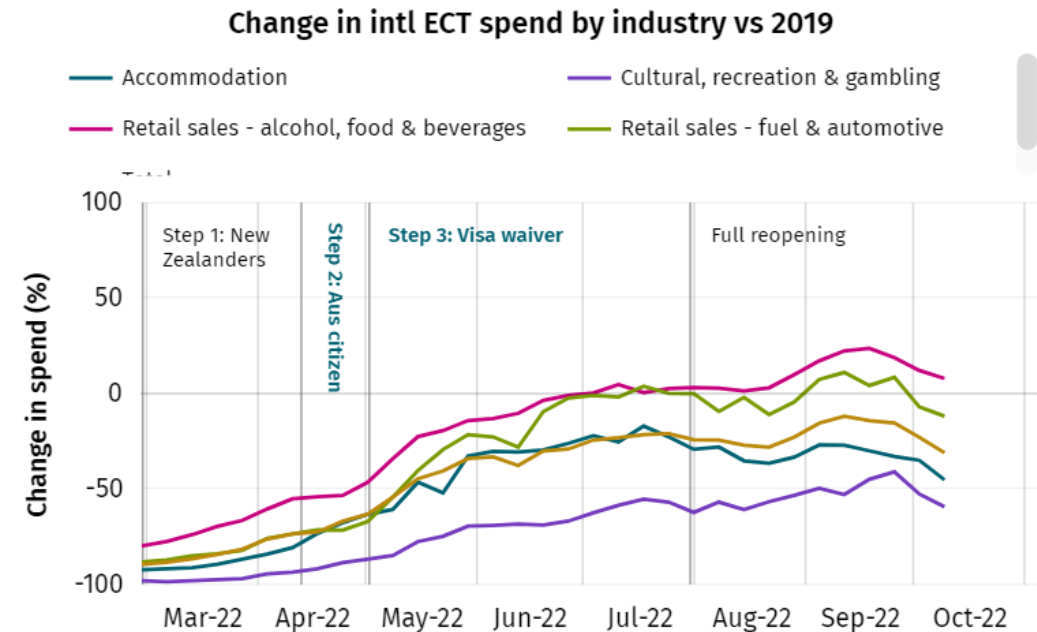
International electronic card transaction (ECT) spend still down 31%

- International ECT^{1,2,3} spend in NZ in the week-ended 9 Oct was down 31% compared to the same week in 2019.
- Spend in the industries 'food and liquor' (up 8% in the latest week) and 'fuel and automotive' (down 11%) 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.
- Recent spend figures are from the low season, and therefore are likely to be more volatile.

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

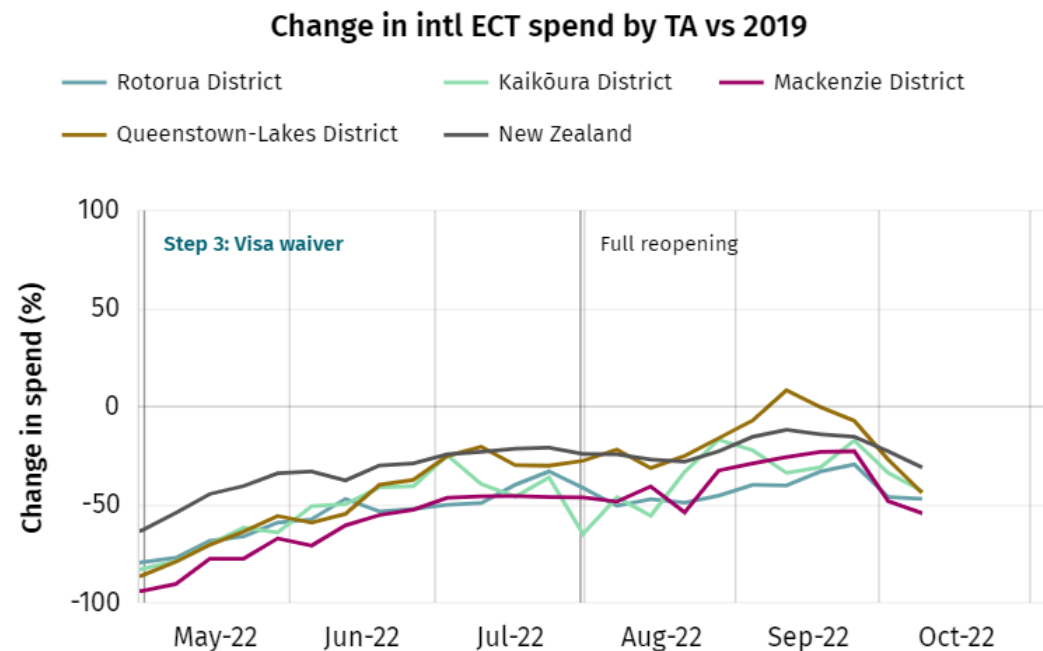
3 Weekly ECT figures are more volatile than monthly spend figures



Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-10-09.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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 (down 31% in the latest week).
- However, this gap seems to be shrinking, likely due to holiday visitors making up a larger proportion of arrivals. Holiday visitors are more likely to participate and spend in traditional tourism activities.
- A strong ski season in Queenstown resulted in international spend hovering around the national average up until the end of winter.



Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-10-09.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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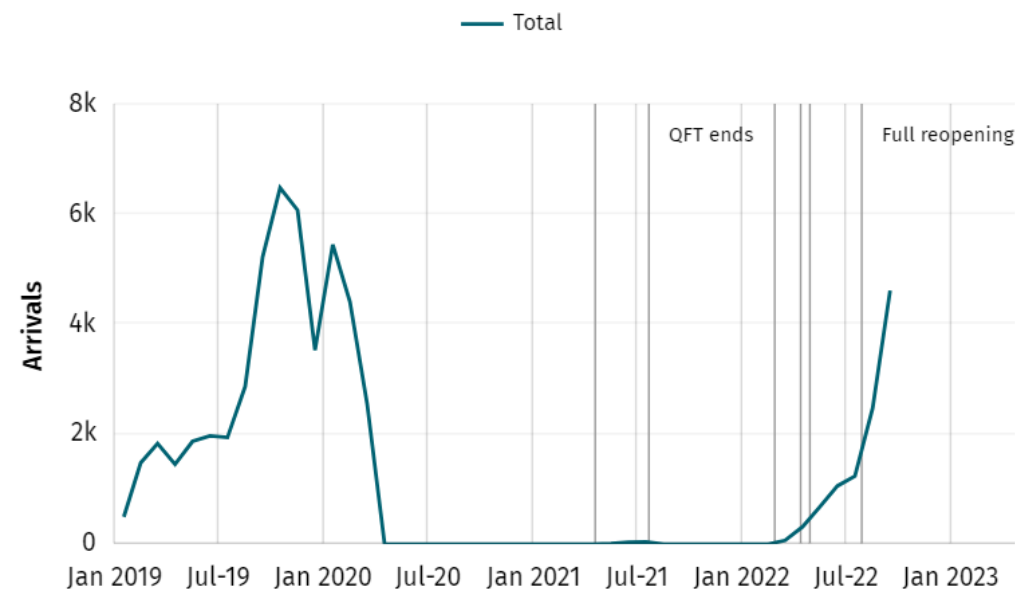
2 ECT spend figures are estimates and are subject to revisions

3 Weekly ECT figures are more volatile than monthly spend figures

September Working Holiday Scheme (WHS) visa arrivals almost double those in August

- WHS visa arrivals¹ totalled 4,620 in September 2022, almost double the 2,480 that arrived in August 2022.
- Compared to pre-COVID levels, this figure is 88% of the 5,230 that arrived on September 2019.
- WHS visa arrivals for 2022 up until the end of September totalled 10,460.
- The increase in WHS visa arrivals was driven by arrivals from Europe, with the UK topping the list at 810 arrivals.

Working Holiday Scheme visa holder arrivals



Source: Immigration NZ. Last updated on 2022-10-04 22:00:00.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

Country	Sept WHS visa arrivals
UK	810
Germany	672
France	621
Czech Republic	297
US	228
Other	201

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

September Working Holiday Scheme (WHS) visa approvals higher than any point in 2019

- WHS visa approvals increased to 7,300 in September continuing the upward trend.
- The total for September 2022 was 9% higher than September 2019, showing good potential for arrivals for the summer season.
- The large figure for March 2022 was due to WHS Special Direction visas being granted automatically¹.



Source: Immigration NZ. Last updated on 2022-10-04 22:00:00.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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. They did not need to apply.

Explore and interact with the data on the



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