



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



Tourism Evidence
and Insights Centre

Tourism Recovery Insights

6 December 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

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.	Stats NZ	27 Nov 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	13 Nov 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 Apr-2023
Weekly consumer spend data	Uses electronic card data as indicator of change in expenditure patterns in the economy	MBIE	27 Nov 22
Working holiday scheme visa information	Monthly working holiday visa scheme approval and arrivals.	Immigration NZ	Nov 22

Summary

Overall weekly **border arrivals** increased in November 2022

- Border arrivals totalled 98,100 in the week ended 27 Nov, 59% being non-New Zealanders.
- Weekly arrivals to Queenstown were above 2019 levels in whole of Nov 2022.

International **visitor arrivals** at its highest since COVID-19 began

- Weekly international visitor arrivals totalled 52,900 in Nov 2022, the highest since COVID-19 began.
- Australian arrivals were at 24,800 in the week-ended 13 Nov 2022, up 49% from week-ended 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.

November **Working Holiday Scheme (WHS)** visa approvals close to pre-COVID levels

- WHS visa applications approved in Nov 2022 were 4,190 (92% Nov 2019 levels).
- November 2022 WHS visa arrivals totalled 5,060, 17% up on October figures.
- WHS visa population in New Zealand increased to 15,940 in Nov 2022 but were still down 58% on Nov 2019.

Other highlights

- Weekly international card spend in week-ended 27 Nov 2022 down 19% on the same week in 2019.
 - International spend in regions more reliant on international tourism is tracking below the national average rate of change.
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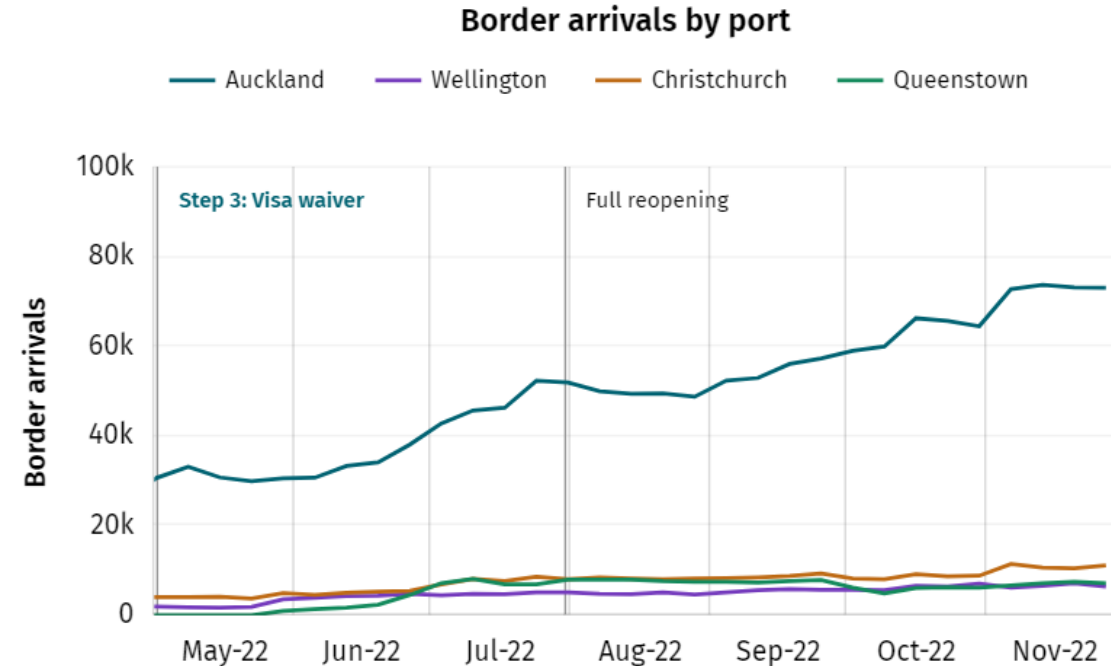
Overall border arrivals increased in November, arrivals to Queenstown above 2019 levels

- Overall border arrivals¹ to NZ reached **98,100** in the week-ended 27 Nov, 31% down on the same week in 2019.
- Of the overall border arrivals, 58,100 were non-New Zealand Citizens (59%).
- Border arrivals to Queenstown continue to be strong, up 6% in the week-ended 27 Nov compared with the same week in 2019.

Week-ended 27 Nov 2022 ²	Border arrivals	Change vs same week in 2019
Auckland Airport	73,100	-32%
Christchurch Airport	11,200	-40%
Queenstown Airport	7,200	6%
Wellington Airport	6,400	-35%

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

2 Arrivals to other airports not included in this table n=200



Source: StatsNZ. Last updated on 2022-11-30.

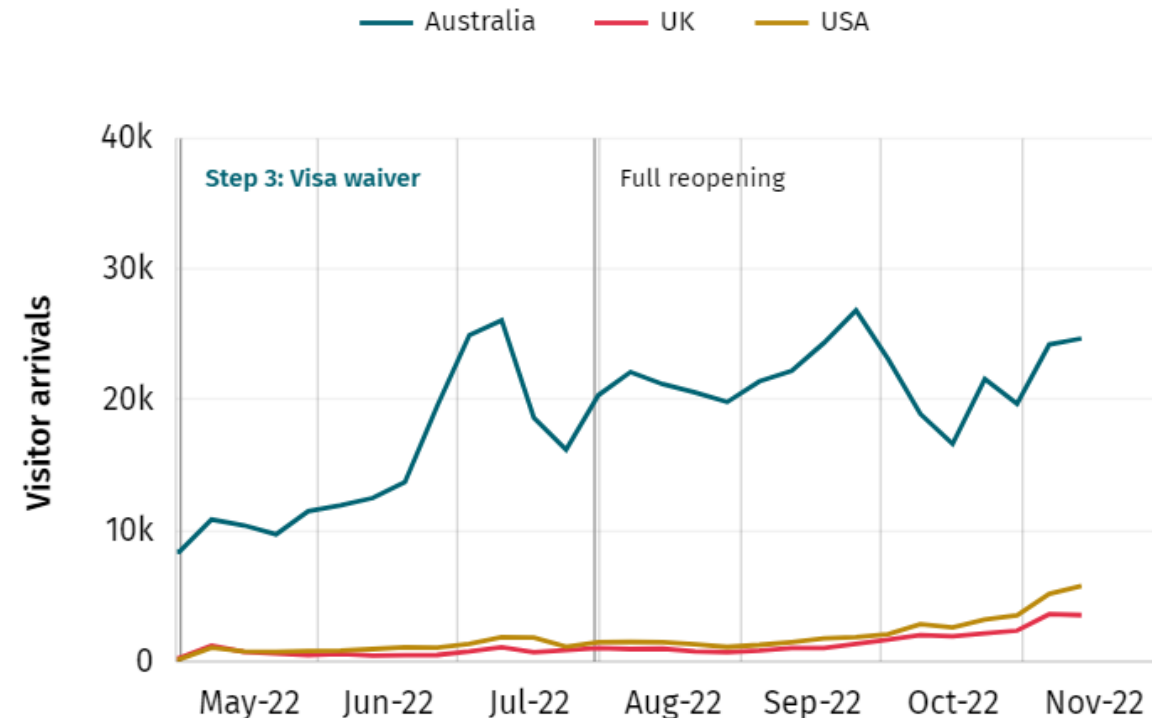
From <https://teic.mbie.govt.nz/teicategories/datareleases/tourismRecoveryDashboard/>

International visitor arrivals reached its highest weekly total in mid-Nov since 2020

- In the week-ended 13 Nov, there were **52,900** international visitor arrivals¹, 62% of 2019's level. This figure is the highest since 2020 (post-COVID).
- The major driver of this is an increase in Australian arrivals, up to 24,800 in the week-ended 13 Nov, from 16,700 at the end of week ending 16 Oct.
- US visitor arrivals in mid-Nov are more than double what they were in mid-Oct (2,700) due to increased flight capacity.

Week-ended 13 Nov 2022	Visitor arrivals	Change vs same week in 2019
Australia	24,800	-19%
USA	5,900	-28%
UK	3,600	-32%

Visitor arrivals by country of residence



Source: StatsNZ. Last updated on 2022-11-30.
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 saw a large increase at the start of November

- International visitor arrivals¹ to NZ for the purpose of a holiday increased to **23,000** in week-ended 13 Nov, up 84% from the week-ended 16 Oct. Again, this figure is the highest since COVID-19 began.
- This figure continues to be greater than the **17,900** that arrived to visit friends and relatives.

Week-ended 13 Nov 2022	Visitor arrivals	Change vs same week in 2019
Holiday/vacation	23,000	-50%
Visit friends/relatives	17,900	-10%
Business	6,800	-43%



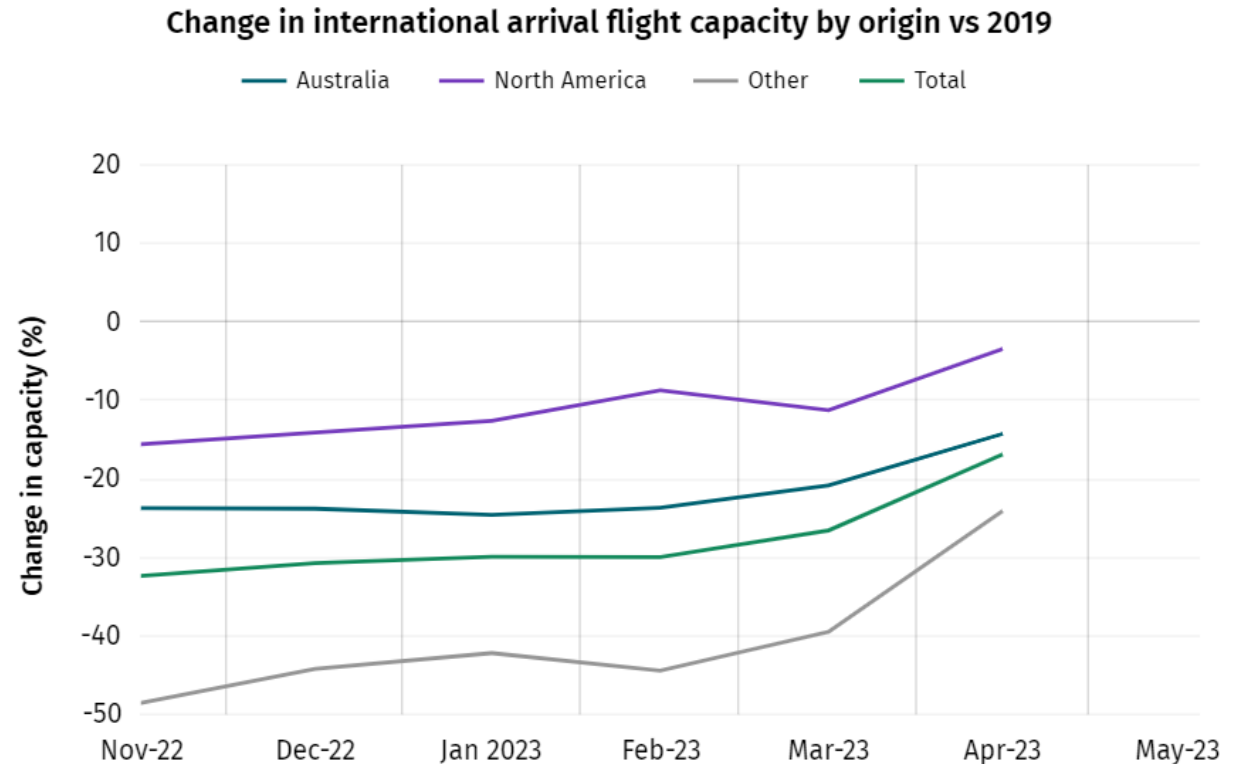
Source: StatsNZ. Last updated on 2022-11-30.
 From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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

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

- By the end of 2022, total operating airline capacity^{1,2} 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 in Nov.

Total capacity (% change on 2019 levels)	Australia	North America	Total
Nov-22	-24%	-15%	-32%
Dec-22	-24%	-14%	-31%
Jan-23	-24%	-12%	-30%
Feb-23	-24%	-9%	-30%
Mar-23	-21%	-11%	-26%
Apr-23	-14%	-3%	-17%



Source: Sabre Market Intelligence. Last updated on 2022-11-30.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

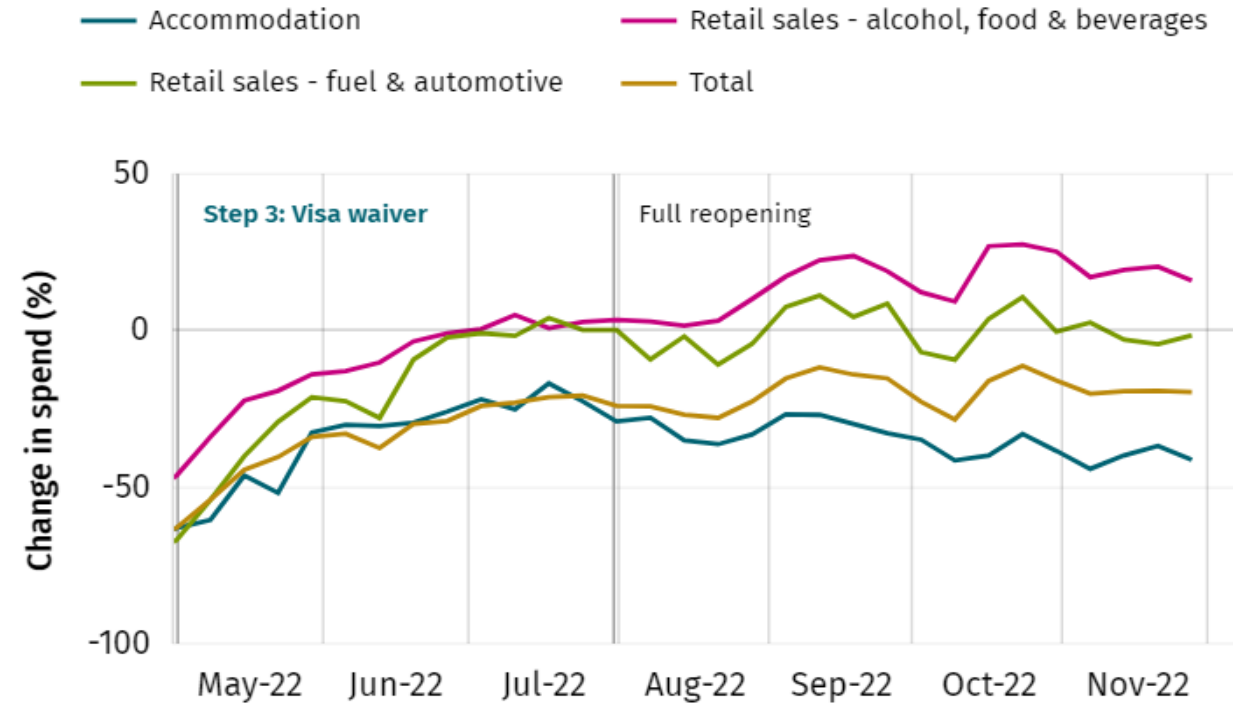
1 Estimates are sourced from Sabre and are subject to change

2 Capacity does not equate to arrivals

International electronic card transaction (ECT) spend remained steady at about 80% of pre-COVID levels

- International ECT^{1,2,3} spend in NZ in the week-ended 27 Nov 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' (down 1%) have been closest to 2019 levels over the year.
- 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 2022-11-27.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

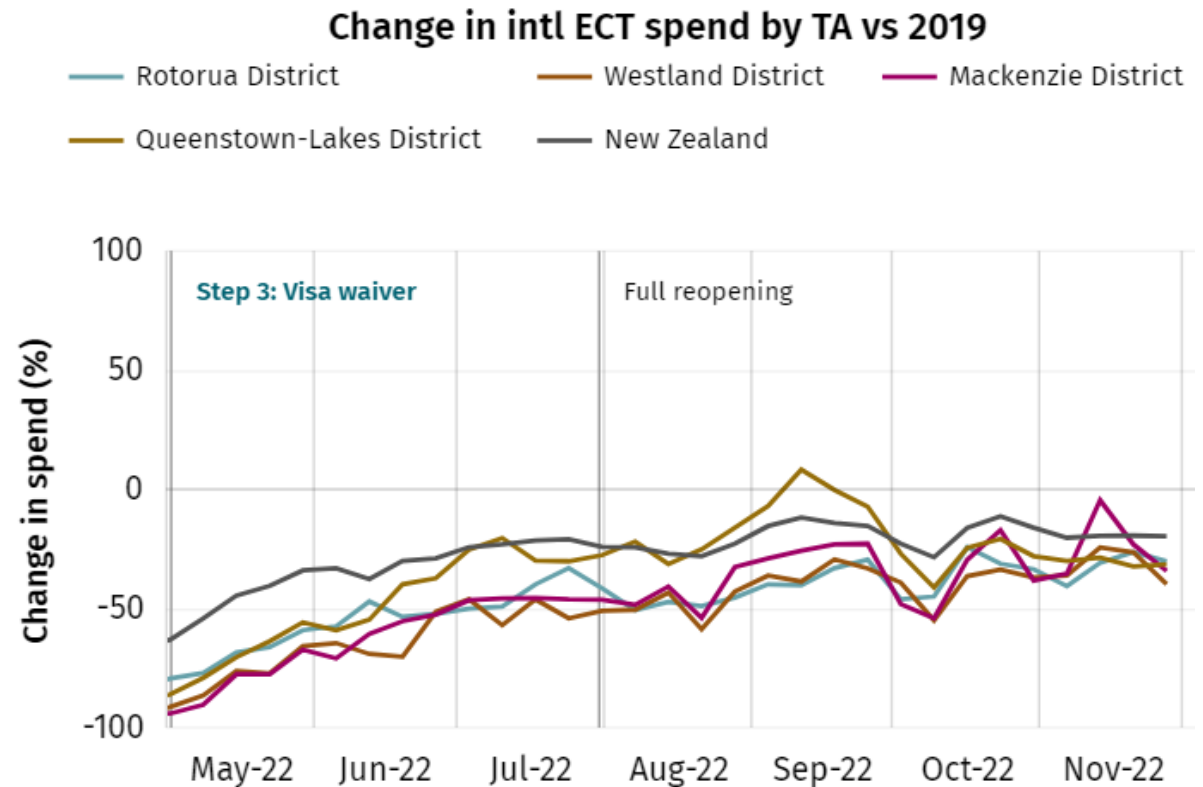
1 International ECT spend is based on the origin of the card, not the consumer. Spend from NZ-residents on international cards will count as international spend

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 inched closer to the national average

- International electronic card transaction (ECT)^{1, 2, 3} 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 week-ended 27 Nov 2022 on 2019 levels).
- This gap has been shrinking over the year, likely due to holiday visitors making up larger proportions of arrivals. Holiday visitors are more likely to participate in and spend on traditional tourism activities.



Source: Marketview via MBIE Consumer Spend Dashboard. Last updated on 2022-11-27.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

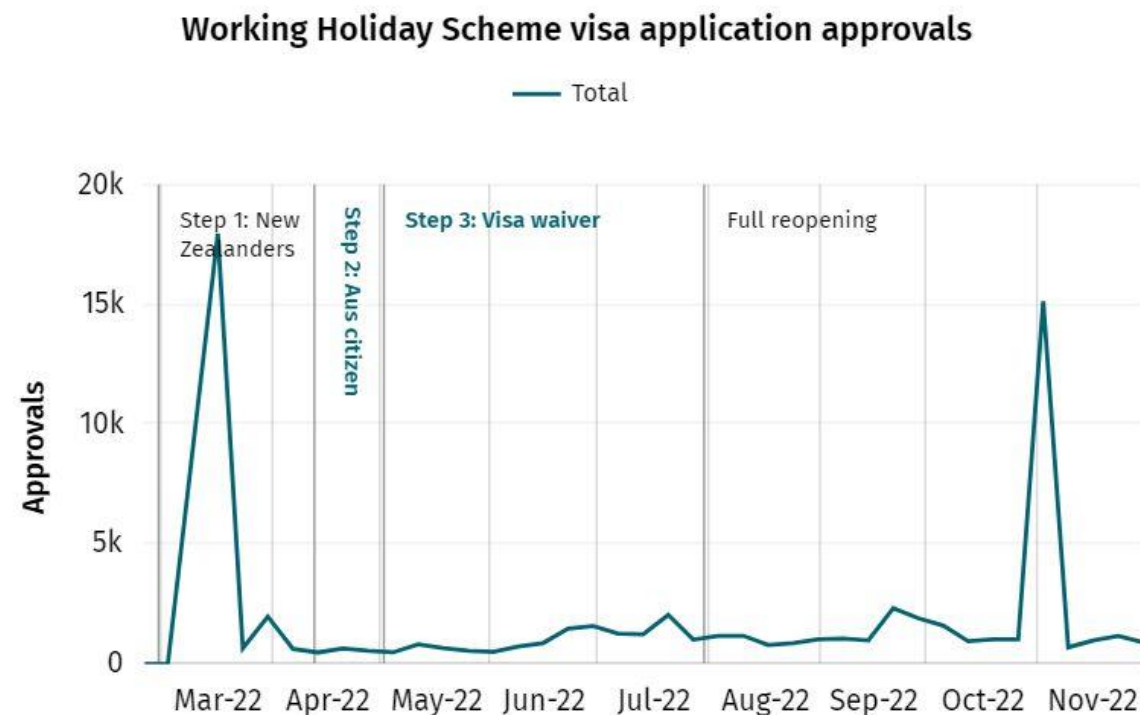
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November Working Holiday Scheme (WHS) visa approvals close to pre-COVID 2019 levels

- **4,190** WHS visa applications were approved in Nov 2022. Compared to pre-COVID levels, WHS visa approvals are only down 8% on the 4,560 that were approved in Nov 2019.
- WHS visa approvals in 2022, as of end of Nov totalled **71,800**. This figure is 29% higher than pre-COVID 2019 levels (over the same period). This large increase was mainly due to WHS Special Direction visas being granted automatically¹ in Mar and Oct 2022, showing potential for arrivals for the upcoming summer season.



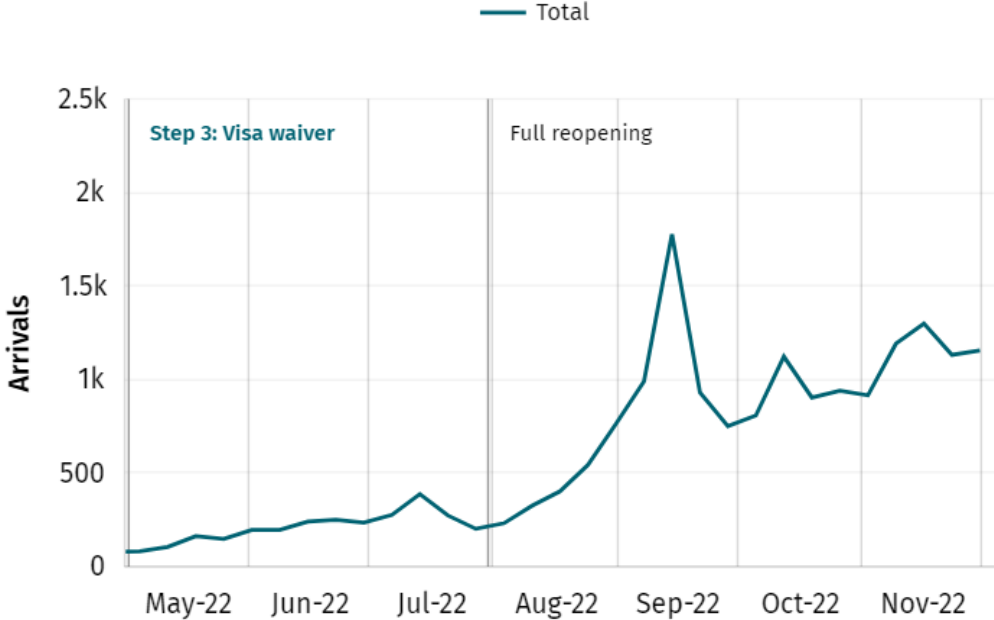
Source: Immigration NZ. Last updated on 2022-11-29 22:00:00.
From <https://teic.mbie.govt.nz/teiccategories/datareleases/tourismRecoveryDashboard/>

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.

November Working Holiday Scheme (WHS) visa arrivals at 81% of 2019 levels

- WHS visa arrivals¹ totalled **5,060** in Nov 2022, 17% up from October 2022 (4,300).
- Compared to pre-COVID levels, WHS visa arrivals are at 81% (down 19%) of the 6,250 that arrived in Nov 2019.
- The increase in WHS visa arrivals was driven by arrivals from Europe, with the UK topping the list in Nov 2022 at 880 arrivals.

Working Holiday Scheme visa holder arrivals



Source: Immigration NZ. Last updated on 2022-11-29 22:00:00.
 From <https://teic.mbie.govt.nz/teiccategories/databreleases/tourismRecoveryDashboard/>

Country	Nov WHS visa arrivals
UK	880
France	875
Germany	820
US	170
Other	1910

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

Working Holiday WHS visa population in New Zealand increased in Nov 2022, but still down 58% on Nov 2019

- WHS visa holders in New Zealand increased to **15,940** by the end of Nov 2022. This figure is up **13%** from Oct 2022.
- Although WHS visa holders have increased, the current figure is still down **58%** on the **38,100** in the country at the end of Nov 2019.



Source: Immigration NZ

Explore and interact with the data on the



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

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