

Forecast of International Visitors/\$ Returning YE May 2023-2025

TECNZ's arrival forecasts for 30 countries based on research and assumptions noted below. The forecasts form a roadmap for NZ's international tourism recovery on a market basis and are based on no self-isolation requirement for visitors.

Assumptions:

- Airline connectivity, capacity seats and IATA forecasts
- Demand from offshore tour wholesalers/agents
- Booking levels held by inbound tour operators (ITOs)
- Strong bookings from Australia, US, Canada, Singapore
- FIFA Women's World Cup Jul-Aug 2023
- Cruise return Oct 2022 (turnaround pax)
- China market return from Mar 2023
- Russia-Ukraine War and Europe energy crisis
- Geo-political/economic status in source markets e.g. worker shortage, inflation and wage rates
- Higher airfares to NZ beyond 2023
- Slow visitor visa processing times
- WHV holders slow return to NZ
- NZ profile from Cyclone Gabrielle
- Covid self-isolation 7 days removed May 2023

Visitor Market Return:

- Australia from Apr 2022
- USA/Canada from Jul 2022
- UK/Europe from Oct 2022
- Asia from Oct 2022
- China from Mar 2023

NZ visitor season starts 1 Oct 2022 and runs to 30 April 2023.



Source: TECNZ updated 20 March 2023

Spreadsheets showing return on a per country basis over 4 years are available on our [website](#) or contact our office.



Summary: Forecast of International Visitors/\$ Returning YE May 2023-2025

Key message

The return of pre-COVID visitor numbers will be a phased process over a period of 3 years. By YE May 2025 TECNZ forecasts 100% of pre-Covid annual arrivals will have returned.

Arrivals (000's):

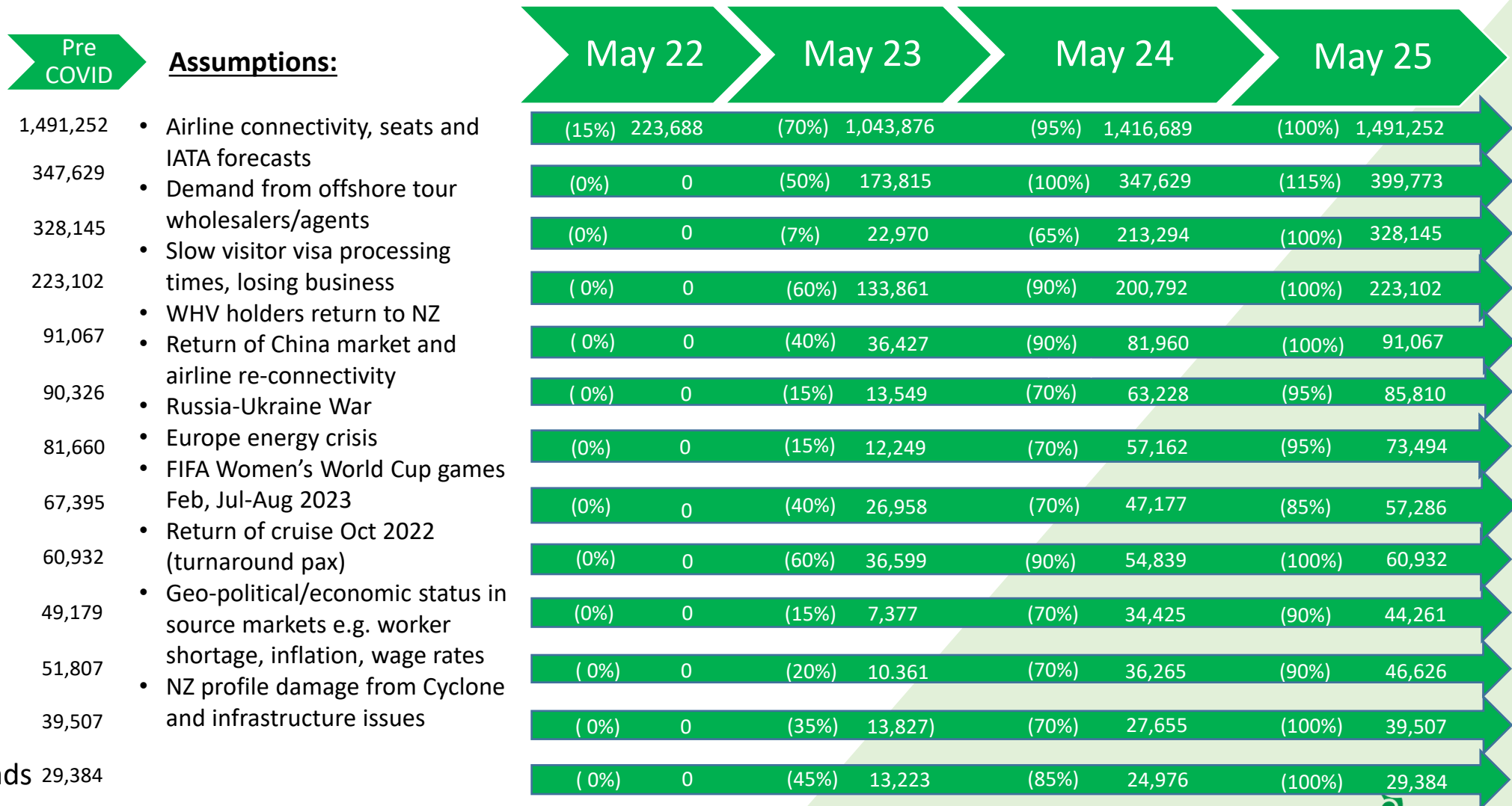
- By YE May 2023 annual number of arrivals 1,720,255 = 50.8%
- By YE May 2024 annual number of arrivals 2,934,258 = 86.7%
- By YE May 2025 annual number of arrivals 3,384,242 = 100.0%



TECNZ has forecast annual visitor arrivals and visitor spend on the key 30 visitor markets Stats NZ used to report on pre-COVID March 2020.

NZ International Tourism Recovery Roadmap (No. Arrivals 000's and % Recovery)

Market recovery based on Australia from April 2022, USA from July 2022, UK/Europe from Oct 2022, Asia from Oct 2022 and China from Mar 2023. By YE May 2025, total annual visitor arrivals (3,384,242) 100% of pre-COVID arrivals as at Mar 2020 of 3,384,517.



Source: TECNZ Forecast based on Stats NZ IVA Top 30 Countries Annual International Arrivals as at YE March 2020, updated 20 March 2023

TECNZ Forecast International No. Arrivals (%) Recovery YE May 2023-May 2025

