

Travel in New Zealand

December 2022

Table of Contents

Travel in New Zealand

EXECUTIVE SUMMARY

Travel in 2022

Airlines: Key trends

Hotels: Key trends

Booking: Key trends

What next for travel?

Chart 1 - Inbound Receipts: 2022-2027

Chart 2 - Average Spend per Trip for Inbound Arrivals: 2022-2027

MARKET DATA

Table 1 - Surface Travel Modes Sales: Value 2017-2022

Table 2 - Surface Travel Modes Online Sales: Value 2017-2022

Table 3 - Forecast Surface Travel Modes Sales: Value 2022-2027

Table 4 - Forecast Surface Travel Modes Online Sales: Value 2022-2027

Table 5 - In-Destination Spending: Value 2017-2022

Table 6 - Forecast In-Destination Spending: Value 2022-2027

DISCLAIMER

SOURCES

Summary 1 - Research Sources

Tourism Flows in New Zealand

KEY DATA FINDINGS

2022 DEVELOPMENTS

New Zealand reopens its borders to the world, resulting in heightened growth

Domestic travel fails to fill the vacuum left by the lack of inbound arrivals

PROSPECTS AND OPPORTUNITIES

Long-haul travellers slow to return due to cost, and ongoing caution

The domestic travel boom continues as New Zealanders discover their own country

CATEGORY DATA

Table 7 - Inbound Arrivals: Number of Trips 2017-2022

Table 8 - Inbound Arrivals by Country: Number of Trips 2017-2022

Table 9 - Inbound City Arrivals 2017-2022

Table 10 - Inbound Tourism Spending: Value 2017-2022

Table 11 - Forecast Inbound Arrivals: Number of Trips 2022-2027

Table 12 - Forecast Inbound Arrivals by Country: Number of Trips 2022-2027

Table 13 - Forecast Inbound Tourism Spending: Value 2022-2027

Table 14 - Domestic Trips by Destination: Number of Trips 2017-2022

Table 15 - Domestic Spending: Value 2017-2022

Table 16 - Forecast Domestic Spending: Value 2022-2027

Table 17 - Outbound Departures: Number of Trips 2017-2022

Table 18 - Outbound Departures by Destination: Number of Trips 2017-2022

Table 19 - Outbound Tourism Spending: Value 2017-2022

Table 20 - Forecast Outbound Departures: Number of Trips 2022-2027

Table 21 - Forecast Outbound Departures by Destination: Number of Trips 2022-2027

Table 22 - Forecast Outbound Spending: Value 2022-2027

Airlines in New Zealand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Cancelled international flights limits airlines to the smaller domestic market
Air New Zealand continues to dominate both international and domestic flights

PROSPECTS AND OPPORTUNITIES

Airlines slow to recover despite the opening Of New Zealand's borders
Fuel prices challenge New Zealand's, being a long-haul destination

CATEGORY DATA

- Table 23 - Airlines Sales: Value 2017-2022
- Table 24 - Airlines Online Sales: Value 2017-2022
- Table 25 - Airlines: Passengers Carried 2017-2022
- Table 26 - Airlines NBO Company Shares: % Value 2017-2021
- Table 27 - Non-Scheduled Carriers Brands by Key Performance Indicators 2022
- Table 28 - Low Cost Carriers Brands by Key Performance Indicators 2022
- Table 29 - Full Service Carriers Brands by Key Performance Indicators 2022
- Table 30 - Forecast Airlines Sales: Value 2022-2027
- Table 31 - Forecast Airlines Online Sales: Value 2022-2027

Lodging (Destination) in New Zealand

KEY DATA FINDINGS

2022 DEVELOPMENTS

Lack of inbound and corporate travel puts pressure on New Zealand hotels
Supply of short-term rentals shift as the residential market becomes lucrative

PROSPECTS AND OPPORTUNITIES

Facing lower business travel and inbound arrivals, New Zealand hotels struggle
Lodging operators to attract new consumer groups to drive growth

CATEGORY DATA

- Table 32 - Lodging (Destination) Sales: Value 2017-2022
- Table 33 - Lodging (Destination) Online Sales: Value 2017-2022
- Table 34 - Hotels Sales: Value 2017-2022
- Table 35 - Hotels Online Sales: Value 2017-2022
- Table 36 - Other Lodging Sales: Value 2017-2022
- Table 37 - Other Lodging Online Sales: Value 2017-2022
- Table 38 - Lodging (Destination) Outlets: Units 2017-2022
- Table 39 - Lodging (Destination) Rooms: Number of Rooms 2017-2022
- Table 40 - Lodging (Destination) by Incoming vs Domestic: % Value 2017-2022
- Table 41 - Hotels NBO Company Shares: % Value 2017-2021
- Table 42 - Hotel Brands by Key Performance Indicators 2022
- Table 43 - Forecast Lodging (Destination) Sales: Value 2022-2027
- Table 44 - Forecast Lodging (Destination) Online Sales: Value 2022-2027
- Table 45 - Forecast Hotels Sales: Value 2022-2027
- Table 46 - Forecast Hotels Online Sales: Value 2022-2027
- Table 47 - Forecast Other Lodging Sales: Value 2022-2027
- Table 48 - Forecast Other Lodging Online Sales: Value 2022-2027
- Table 49 - Forecast Lodging (Destination) Outlets: Units 2022-2027

KEY DATA FINDINGS

2022 DEVELOPMENTS

Bookings recover through both online and offline channels
Whether for business or leisure, New Zealanders want to book directly

PROSPECTS AND OPPORTUNITIES

The spike in offline bookings declines as holidaymaker's need for reassurance subsides
Travel intermediaries' success is dependent on consumer and business confidence

CATEGORY DATA

- Table 50 - Booking Sales: Value 2017-2022
- Table 51 - Business Travel Sales: Value 2017-2022
- Table 52 - Leisure Travel Sales: Value 2017-2022
- Table 53 - Travel Intermediaries NBO Company Shares: % Value 2017-2022
- Table 54 - Forecast Booking Sales: Value 2022-2027
- Table 55 - Forecast Business Travel Sales: Value 2022-2027
- Table 56 - Forecast Leisure Travel Sales: Value 2022-2027

About Euromonitor International

Euromonitor International is an independent market intelligence provider. Data, insight and analysis stem from in-the-field research spanning 210 national markets.

Content ranges from the in-depth and country-specific, to key strategic themes with a global range and significance. Products cover a comprehensive range of insights and market data, but can be broadly categorised as:

- **Strategy Briefings:** Global or regional in scope, and focussing on the most important themes shaping consumer demand, the key markets, competitive environment and future outlook across a range of industries.
- **Company Profiles:** Analysis dedicated to the world's most significant companies, with detailed insight into their activities, focus of operations, their competitors, their geographic presence and performance.
- **Country Reports:** For an in-depth understanding of specific countries, whether by industry, economic metrics or consumer trends and lifestyles. These reports cover current trends, consumer demand, market potential and future prospects, with country-specific local insight and comprehensive data, unavailable elsewhere.

For more information on this report, further enquiries can be directed via this link www.euromonitor.com/travel-in-new-zealand/report.