
INZ Visitor Data and Insights

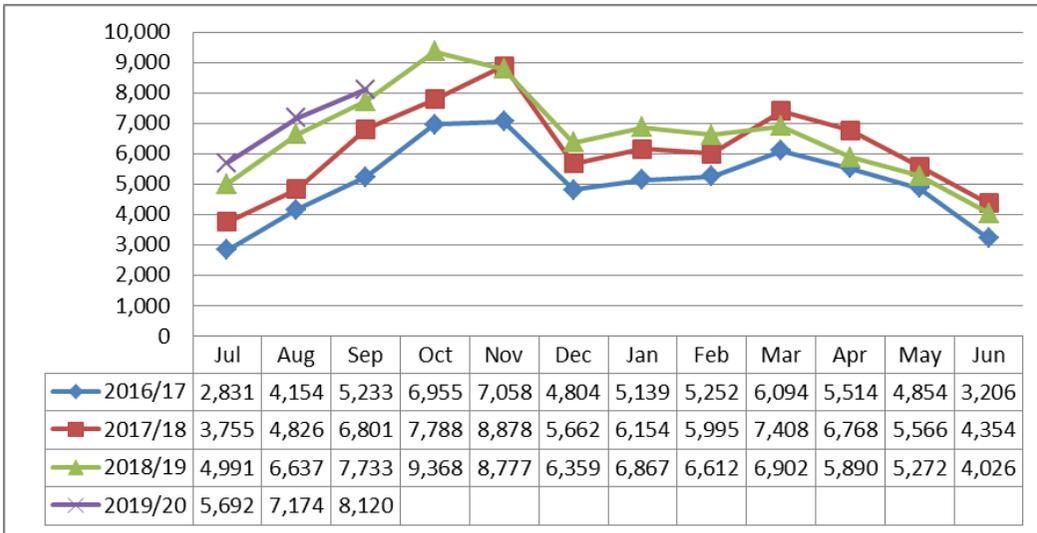
September 2019

Contents

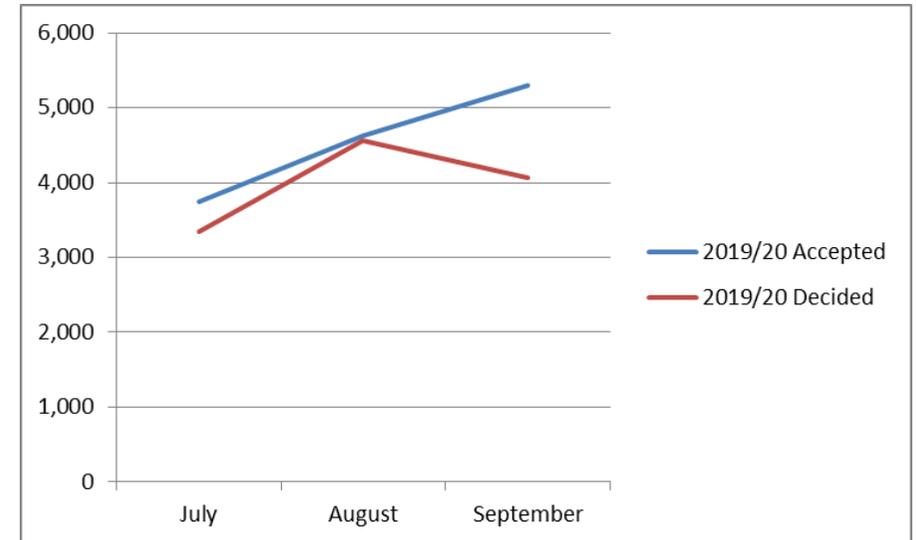
- India Visitor Visa (3)
- China Visitor Visa (4)
- China Visitor Arrivals (5-6)
- Visitor Visa Processing Insights (7-10)

India Visitor Visa

*to end of September 2019



Graph 1: Accepted Pax - monthly trend 2017/18 to 2019/20



Graph 2: Accepted vs Decided applications – 2019/20 monthly trend

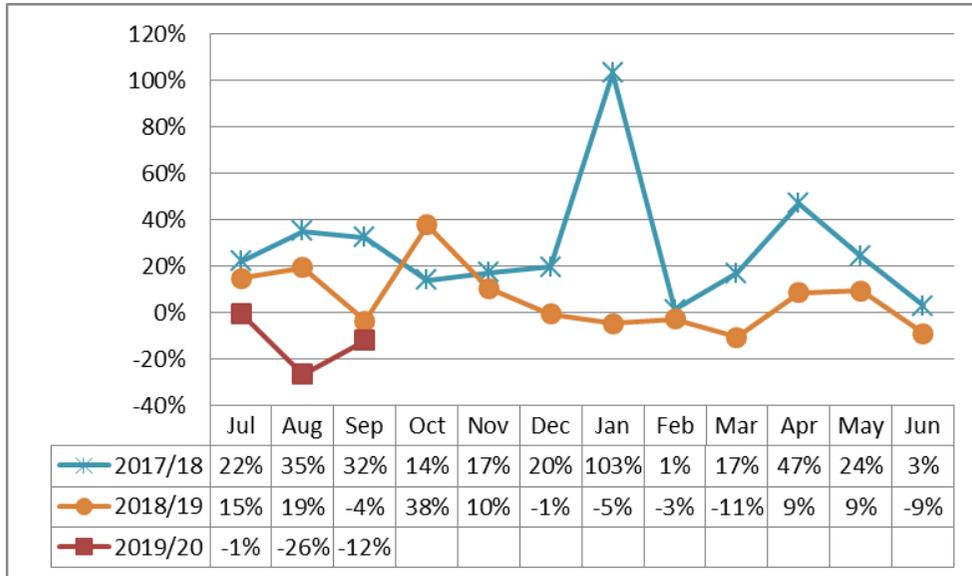
Key Insights:

- INZ has received high volumes of **General Visitor Visa** applications from Indian nationals in Q1 of this financial year.
- This September, INZ-India accepted 5,293 **applications** (8% YoY) and decided 4,068 (2% YoY).
- The volume of **people** associated with these applications has seen a 5% increase in September 2019 compared to September 2018.
- The number of Indian nationals applying for visitor visas during Q1 2019 exceeded 20,000 (13,660 applications) for the first time. We have seen an 8% growth in Indian nationals applying for GVs in Q1 compared to Q1 last year.
- The approval rate for Indian visitor visa applications (84%) so far in 2019 is down compared to previous years (91% in 2017 and 2018).

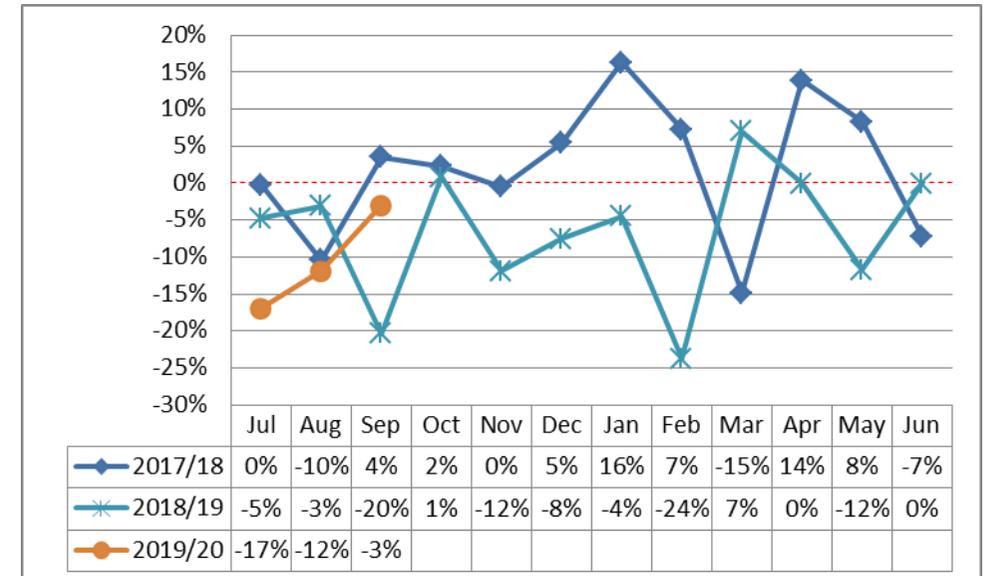
China Visitor Visa

For month of September

	2016	%	2017	%	2018	%	2019	%	% change 18 vs 19
General Visitor Visa	15,714	58	20,772	64	20,022	68	17,617	66	-12%
ADS	11,191	42	11,583	36	9,222	32	8,939	34	-3%
TOTAL	26,905		32,355		29,244		26,556		-9%



Graph 1: decided GVV people – YOY monthly percentage change 2017 to 2019



Graph 2: decided ADS people – YOY monthly percentage change 2017 to 2019

Key insights

- A **-12% YOY** decrease in September for **General Visitor Visas** received from Chinese nationals and decided by INZ China offices. This is the largest decrease for September we have seen for the last few years.
- **ADS** remains weak (volumes) and has had a small **YOY** decrease of **-3%**.
- As per the trend over the past few years, GVV continues to outnumber ADS in the month of September. ADS levels are slowly decreasing.
- Total China visitor visas down by **-9% YOY**.

China Visitor Arrivals

for month of **August**

- The **7% decrease** in Chinese visitor arrivals for August was mainly driven by a decrease in arrivals from *Guangdong* province (down by **8%** compared to August last year).
- Length of stay** has mostly increased in August. Chinese visitors spent slightly longer in New Zealand this August, compared with August last year (an average of 8.8 days). Length of stay for visitors from *Shanghai* has decreased this August, whereas it has increased quite a bit for *Beijing* and *Guangdong* compared to August 2018. Overall, Year To Date length of stay for Chinese visitors has increased.
- The cohort of Chinese visitors staying in NZ for **8-14 days** continues to be strong (despite only being up **1.2%** this August, and down **5.4%** YoY), and, remains relatively strong against the number of very short stay (1-3 days) visitors typically associated with shopping tour groups. This cohort has also had large decreases both YoY and YTD. The cohort of visitors staying **15-21 days** has gone up **10.4%** this August compared to August 2018. The cohort of visitors staying **22+ days** has seen an increase of **7.9%** YoY.
- The volume of visitors from *Jiangsu* have experienced higher growth over the past 12 months – visitor volumes increasing by **5%** for the year ending August.
- The volume of Chinese nationals flying to NZ via *Guangzhou*, *Chengdu* and *Shanghai* rose by **27.9%**, **12.5%** and **9.5%** respectively in August 2019. Volumes flying to NZ via *Hong Kong* have seen a particularly significant decrease this August, down by **55.1%**.

China visitor - statistics

	% change in visitor arrivals: month of August 2019	% change in visitor arrivals: YTD	% change <u>holiday</u> visitor arrivals: YTD	Median length of stay: month of August 2019 (last year)	Median length of stay: YTD (last year)
China	-7% (29,327)	-7.4% (417,930)	-9.4% (312,723)	8.8 (8.4)	8.6 (8.2)
Beijing	-1.3% (3,191)	-10% (49,291)	-12.2% (37,921)	9.6 (8.6)	9.4 (9.3)
Shanghai	8.3% (4,105)	-6.8% (62,370)	-6.3% (51,695)	8.7 (9.0)	9.6 (9.7)
Guangdong	-8% (4,474)	-6.6% (63,995)	-7.4% (50,614)	9.1 (7.9)	8.6 (8.8)

China Visitor Arrivals cont.

China visitor – Length of stay

Length of Stay	Month of August 2019	% change	Year to August 2019	% change
1-3 days	6,098	-23.2	104,066	-20.3
4-7 days	6,030	-5.3	80,417	1.4
8-14 days	10,720	1.2	136,164	-5.4
15-21 days	2,686	10.4	32,101	-13.2
22+ days	3,793	-9.9	65,182	7.9

China visitor – Province of residence

Province of Residence	Number of visitors: YE August 2019	% change: YE August 2019 vs 2018
Guangdong	63,995	-6.6
Shanghai	62,370	-6.8
Beijing	49,291	-10.0
Zhejiang	23,150	-11.5
Jiangsu	22,536	5.0
Sichuan	18,656	-3.6
Shandong	12,773	-3.5
Liaoning	10,511	-0.6
Fujian	8,486	-2.1
Henan	7,119	-6.1

China visitor – closest port of flight

Airport	Pax	% change
Guangzhou	7,080	27.9
Shanghai	7,008	9.5
Melbourne	2,793	-13.6
Sydney	2,036	-16.3
Beijing	2,018	-4.5
Hong Kong	1,831	-55.1
Brisbane	1,796	-15.0
Shenzhen	1,598	-4.0
Chengdu	1,512	12.5

Visitor Visa Processing Insights

Up to 30 September 2019

General Visitor Visa Processing Information¹

Tendered Volumes

Table 1: General visitor visa applications tendered by applicants offshore at date of application submission.

Nationality	Number of Applications Tendered				
	Calendar Year Comparison			Peak Visitor Months Comparison	
	2017	2018	2019 (to 30 September)	1 Oct 2017 - 31 Mar 2018	1 Oct 2018 - 31 Mar 2019
China	164,100	196,949	118,704	105,697	105,287
India	46,989	53,053	36,564	29,498	29,476
All Other Nationalities	121,056	126,500	90,982	51,053	51,792
Total	332,145	376,502	246,250	203,155	203,623

¹ The data in all tables except Table 5 only includes applications tendered offshore.

Visitor Visa Processing Insights

Up to 30 September 2019

Decision Volumes²

Table 2: Decided general visitor visa applications for applicants offshore at date of application submission.

Nationality	Calendar Year Comparison						Peak Visitor Months Comparison			
	2017		2018		2019 (to 30 September)		1 Oct 2017 – 31 Mar 2018		1 Oct 2018 – 31 Mar 2019	
	Applications Decided	Approval Rate	Applications Decided	Approval Rate	Applications Decided	Approval Rate	Applications Decided	Approval Rate	Applications Decided	Approval Rate
China	162,194	94%	191,815	92%	120,672	91%	105,548	94%	105,386	93%
India	45,139	91%	50,276	89%	36,051	84%	29,280	92%	28,233	89%
All Other Nationalities	116,402	88%	123,359	86%	86,507	87%	67,493	88%	67,098	87%
Total	323,735	91%	365,450	90%	243,230	89%	202,321	92%	200,717	90%

² Please note that the accepted and decided application volumes will not be equivalent. This is because some applications which have been accepted in one time period may not have been decided in the same time period.

Visitor Visa Processing Insights

Up to 30 September 2019

Processing Times

Table 3: Time taken for all general visitor visa applications (from applicants offshore at date of application submission) to be decided from date application is submitted to date of decision.

Nationality	Calendar Year Comparison			Peak Visitor Months Comparison	
	2017	2018	2019 (to 30 September)	1 Oct 2017 - 31 Mar 2018	1 Oct 2018 - 31 Mar 2019
	80% Decided Within ³	80% Decided Within	80% Decided Within	80% Decided Within	80% Decided Within
China	6 days	10 days	14 days	6 days	19 days
India	15 days	18 days	23 days *	16 days	28 days
All Other Nationalities	22 days	21 days	19 days **	21 days	23 days

*Processing time down to 23 days as at 30 September compared to 30 days as at 31 July

**19 days processing time for other nationalities is the lowest we have seen in the past three years

Table 4: Time taken for general visitor visa applications (from applicants offshore at date of application submission) to be decided from date application is submitted to date of decision, **low risk only**

Nationality	Calendar Year Comparison			Peak Visitor Months Comparison	
	2017	2018	2019 (to 30 September)	1 Oct 2017 - 31 Mar 2018	1 Oct 2018 - 31 Mar 2019
	80% Decided Within	80% Decided Within	80% Decided Within	80% Decided Within	80% Decided Within
China	4 days	7 days	8 days	4 days	9 days
India	3 days	6 days	10 days	4 days	7 days
All Other Nationalities	7 days	9 days	9 days	7 days	12 days

³ "80% decided within" means that of the applications decided in the relevant time period, 80% of these were decided within XX days.

Visitor Visa Processing Insights

Up to 30 September 2019

On Hand⁴ Volumes

Table 5: All general visitor visa applications on hand as at 30 September 2019

Nationality	Time Elapsed Since Application Submission				Total
	0-15 Days	16-30 Days	31-60 Days	61+ Days	
China	5,299	225	45	35	5,604
India	2,240	346	132	596	3,314
All Other Nationalities	5,220	1,017	326	214	6,777
Total	12,759	1,588	503	845	15,695

⁴ On hand: refers to applications currently with INZ processing offices which have not yet been decided (approved or declined). This includes applications which are being assessed by an immigration officer and applications which are in a queue waiting to be allocated to an immigration officer.

- Over the previous pages are tables that detail the volumes, decision times and approval rates for visitor visa applications
- The data in tables 1 to 4 includes only general visitor visa applications from applicants who were not in New Zealand when they submitted this application. While there are still limitations to this method, we believe this should give you a more accurate picture of the performance of visitor markets. We have excluded onshore applicants because there are a wide variety of reasons as to why someone who is in New Zealand will apply for a visitor visa, many of which are not tourism-related.