

Tātaki
Auckland
Unlimited



Tāmaki Makaurau Auckland Destination Overview

January 2024

A comprehensive and up-to-date overview of Auckland's visitor economy – from the latest arrival, accommodation, spend, events and tourism sentiment data.

Prepared February-March 2024
By Jaimee Raymond, Research & Insights

aucklandunlimited.com

Contents

KEY FINDINGS	3
<hr/>	
VISITOR ARRIVALS DATA	
INTERNATIONAL VISITORS	
REASON FOR VISIT MARKET	5 – 10
AUCKLAND VS. OTHER PORTS	11
<hr/>	
ACCOMMODATION DATA	
COMMERCIAL GUEST NIGHTS TYPE	13 – 14
ADR, HOTEL OCCUPANCY AND REVPAR	15 – 16
AVERAGE LENGTH OF STAY	17
FORWARD BOOKING DATA	18
FORECAST ACCOMMODATION DATA	19 – 21
<hr/>	
SPEND DATA	22
<hr/>	
MAJOR & BUSINESS EVENTS DATA	
MAJOR EVENTS INSIGHTS	24 – 26
BUSINESS EVENTS INSIGHTS	28 – 32
<hr/>	
AUCKLAND VISITOR SURVEY	
VISITOR EXPERIENCE & NET PROMOTER SCORE	34 – 35
<hr/>	
FIVE YEAR TRENDS IN KEY MARKETS	
REASON FOR VISIT BY MARKET	37 – 41



Key Visitor Data



INTERNATIONAL

- **Monthly international visitors (219.0k)** were up **27.3%** on January 2023 (172.0k) but numbers were down 23.2% compared to January 2020 pre-Covid (285.3k).
- **The year to January 2024** saw **2.08m international visitor arrivals, an increase of 83.9%** on 2023. However, international visitation was down 23.8% compared to pre-Covid levels (2.73m in YE January 2020).
- There was an increase in visitors from the **Australian market** in **January 2024**, with **60.9k visitors, up 4.2%** compared to last year. **The year to January 2024** saw **687.1k Australian visitors, up 29.7%**.
- **Holiday visitors (828.6k)** contributed the most to annual visitor numbers and **increased 143.5%** in the year to January 2024. **Monthly numbers (104.2k)** were up **39.2%** compared with January 2023.
- **VFR visitors (747.5k)** were up **41.2%** for the year, with **monthly numbers (69.0k)** up **13.0%**.
- **326.2k international guest nights in commercial accommodation** for January, up **27.1%** on last year.

DOMESTIC

- The domestic visitor numbers are no longer available as the Ministry of Business, Innovation, and Employment (MBIE) has cancelled the Monthly Unique Regional Population Estimates (MURPEs) data until further notice.
- There were **396.9k domestic guest nights in commercial accommodation** for the month of **January, down 7.8%**.
- At present, we cannot display current spend data from the Monthly Regional Tourism Estimates (MRTES) as this dataset has been paused by MBIE (due to the disestablishment of Data Ventures – a branch of Stats NZ which occurred in December 2023).
- Regional spend data for domestic and international visitors to Auckland will be reported again once the issue has been remedied.

OVERALL

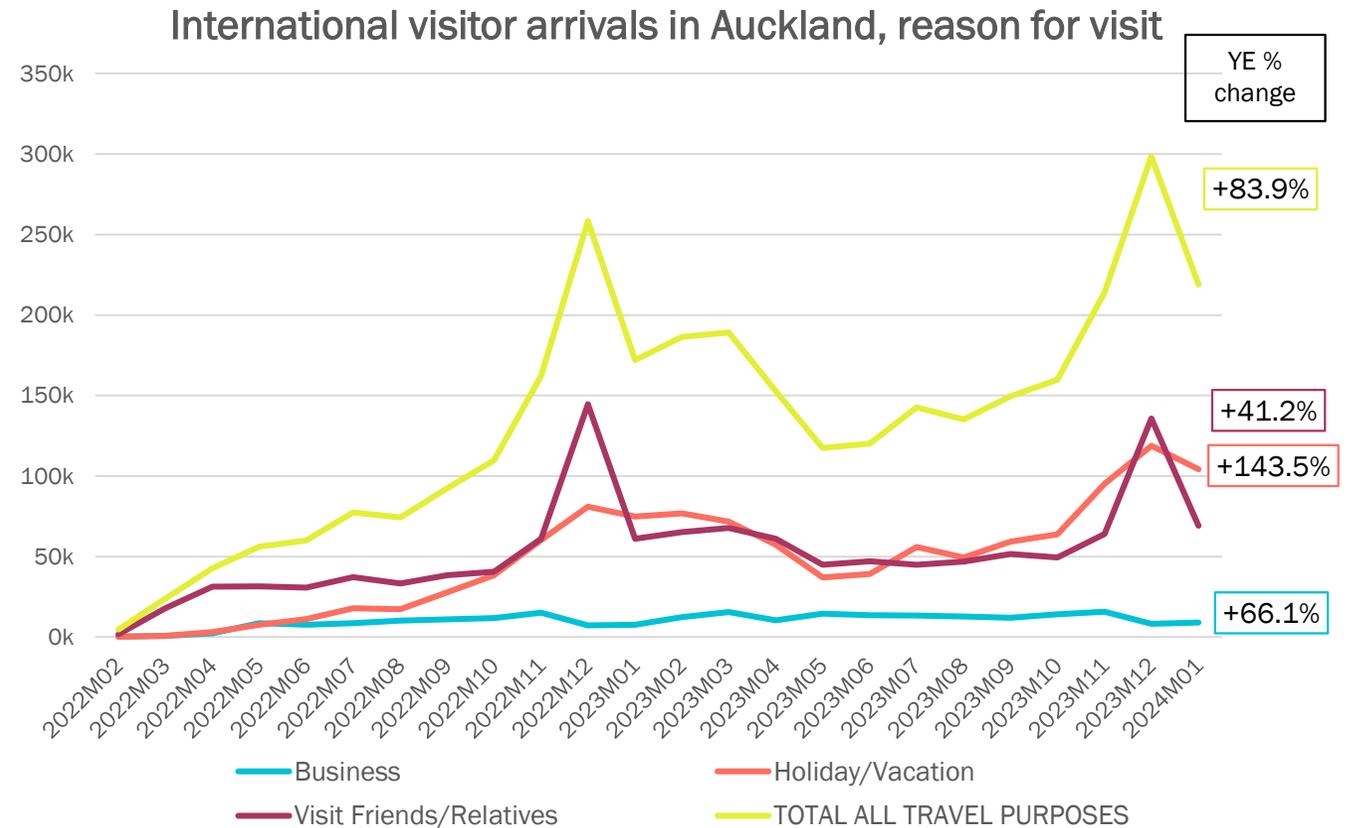
- For the month of January 2024, there were **723.1k total guest nights in commercial accommodation** in Auckland, up **5.2%** on last year.
- **On average, visitors stayed in Auckland for 2.1 nights** in January 2024 (no change on the previous year).
- **Average hotel Occupancy** for the month was **66.6%, 4.9% higher** compared to January 2023.
- The **Average Daily Rate** for January was **\$231 (down 6.2%)** and the **RevPAR** was **\$154 (down 2.2%)** compared to the previous year).
- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Monday 1st January 2024 at \$268 (up 2.5% on the previous year). This is when the ASB Classic event commenced.
- **Looking forward (over the next twelve months), overall occupancy on the books is generally higher for the period from March 2024 to February 2025** in comparison to last year.
- Occupancy on the books peaked at 97% on Friday 8th March 2024, when P!NK performed at Eden Park.



Auckland Tourism – Visitor Arrivals Data

2.08m International visitor arrivals in the year to January 2024, up 83.9%

- The month of January saw 219.0k international visitors, up 27.3% on January 2023 (172.0k) but down 23.2% compared to pre-Covid numbers (285.3k in January 2020).
- The year to January 2024 saw 2.08m international visitor arrivals, an increase of 83.9% on the previous year. However, international visitation was down 23.8% compared to pre-Covid levels (2.73m in YE January 2020).
- Holiday visitors (828.6k) contributed the most to annual visitor numbers and increased 143.5% on the year to January 2024. Monthly holiday numbers (104.2k) were also up 39.2% compared with the month of January 2023.
- VFR visitors (747.5k) were up 41.2% for the year, with monthly numbers (69.0k) up 13.0%.
- There were 151.4k business visitors (up 66.1%) in the year to January 2024, and 8.9k for the month (up 17.5%).



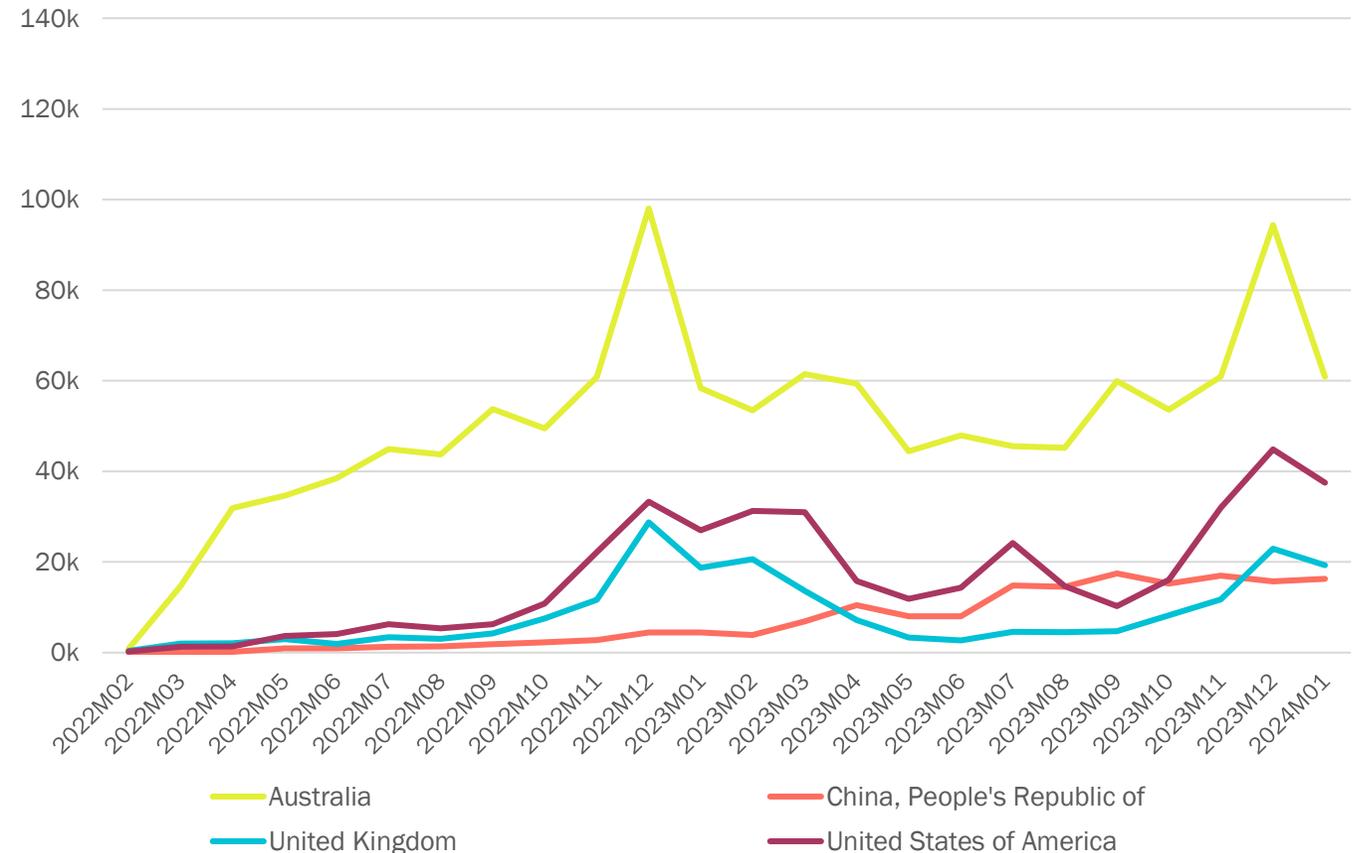
	Visitor arrivals	vs. previous year / YE	vs. pre-Covid / 2020
January 2024	219,005	27.3%	-23.2%
YE January 2024	2,084,605	83.9%	-23.8%

687.1k visitors from Australia for YE January 2024, up 29.7%

- There was an increase in **Australian visitors** in the month of January 2024, with **60.9k visitors, up 4.2%** compared to last January. **The year to January 2024 saw 687.1k Australian visitor arrivals, up 29.7%.**
- **The year to January 2024 saw 283.8k visitors from the US (up 133.1%), with 37.5k visitors for the month (up 38.9%).**
- **Visitors from China (148.4k) were also up for the year (620.3%), and up (264.0%) for the month of January (to 16.3k).**
- For the year to January 2024, there were **123.5k visitor arrivals from the UK (up 42.6%)** and **19.3k visitors for the month (up 3.1%).**

aucklandunlimited.com

Visitor arrivals in Auckland by key international markets



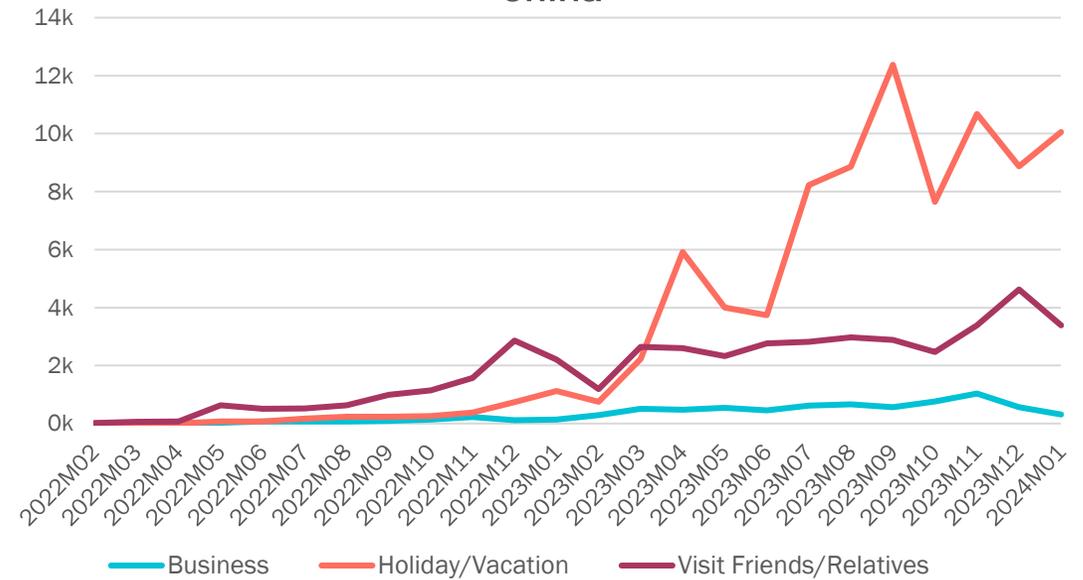
24-month visitor arrivals from individual markets

Australia



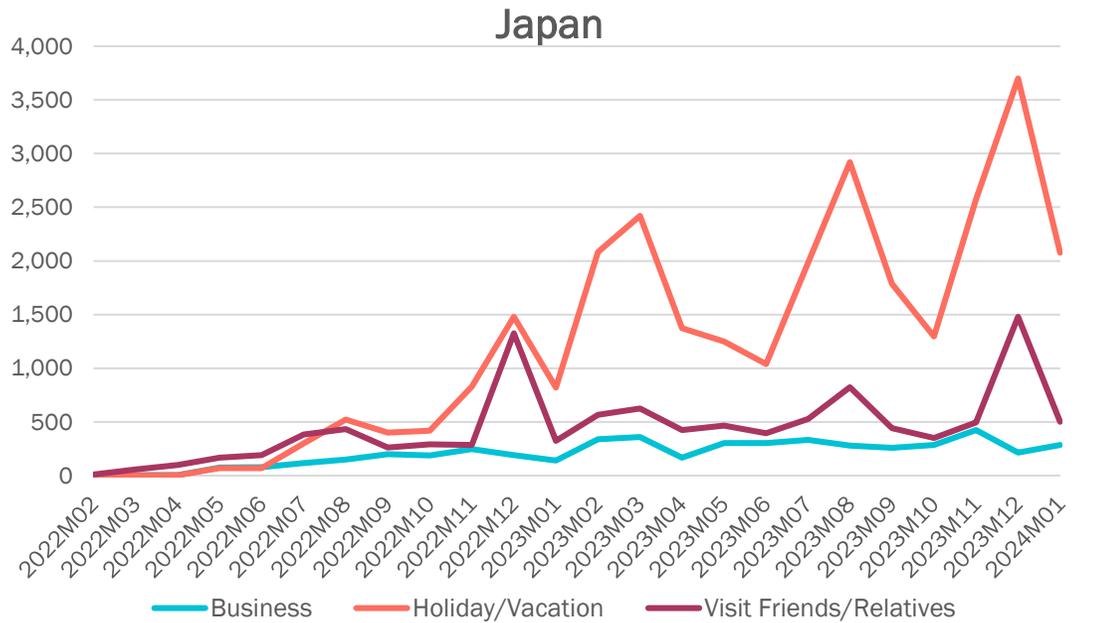
		vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	4,631	25.0%	20,169	-0.2%	29,700	9.6%	60,874	4.2%
YE January 2024	86,760	42.4%	182,955	48.5%	333,088	15.6%	687,093	29.7%

China

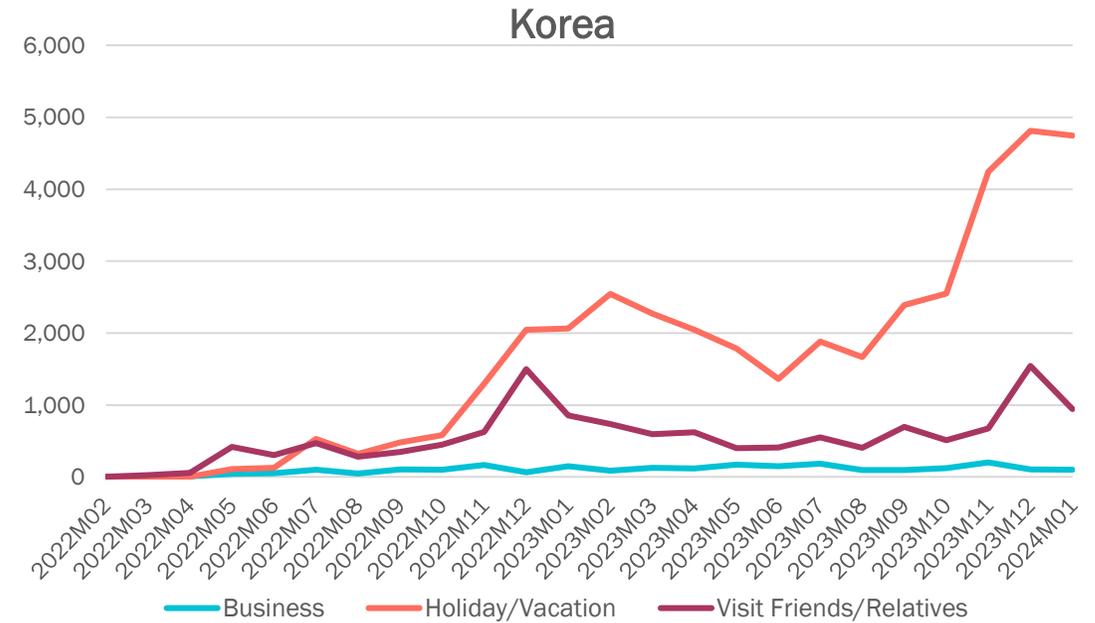


		vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	307	129%	10,056	797.9%	3,382	53.4%	16,286	264.0%
YE January 2024	6,741	610.3%	83,346	2433.3%	34,049	204.3%	148,366	620.3%

24-month visitor arrivals from individual markets



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	285	105.0%	2,078	153.1%	500	55.3%	4,719	75.6%
YE January 2024	3,543	154.3%	24,506	398.5%	7,088	85.3%	48,725	240.1%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	100	-32.9%	4,747	130.1%	944	10.0%	6,673	73.6%
YE January 2024	1,568	84.9%	32,307	326.8%	8,098	51.3%	48,545	199.8%

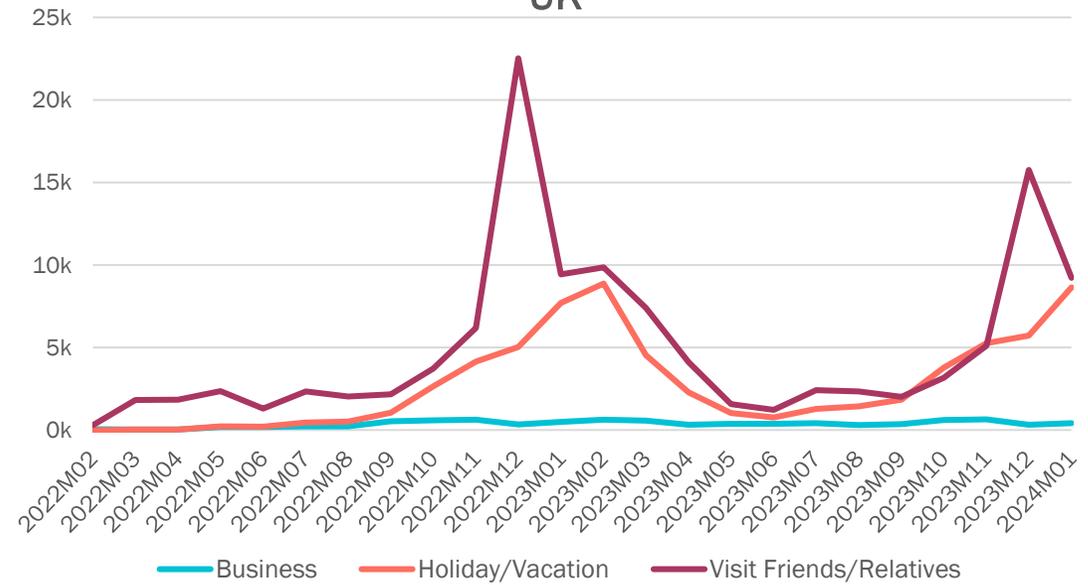
24-month visitor arrivals from individual markets

Germany



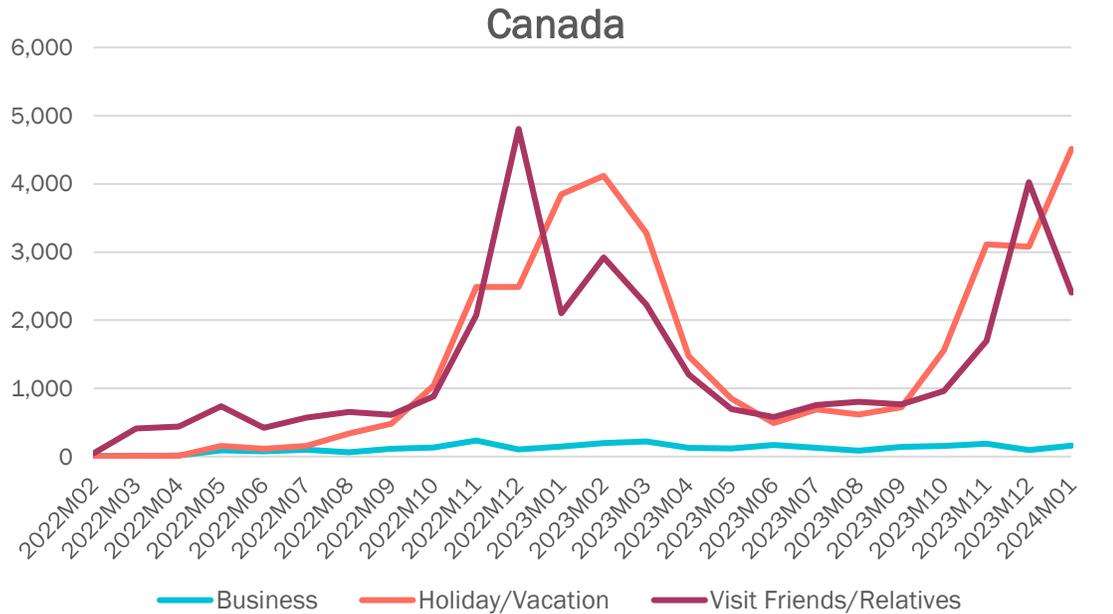
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	138	-8.0%	4,598	21.0%	1,030	2.8%	6,590	14.4%
YE January 2024	1,613	56.0%	30,142	103.1%	7,805	36.6%	44,412	85.3%

UK



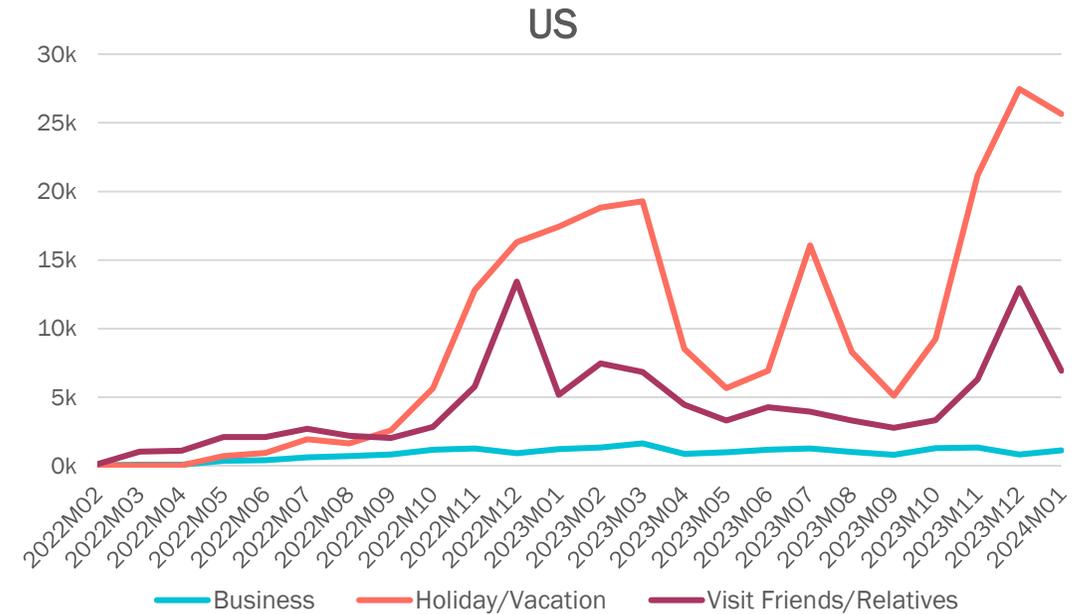
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	414	-17.9%	8,655	12.3%	9,229	-2.1%	19,285	3.1%
YE January 2024	5,395	50.5%	45,518	105.7%	64,237	14.5%	123,499	42.6%

24-month visitor arrivals from individual markets



	Business	vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	161	8.1%	4,512	17.3%	2,405	14.5%	7,698	15.7%
YE January 2024	1,802	62.9%	24,497	119.9%	19,052	38.4%	50,525	77.9%

aucklandunlimited.com

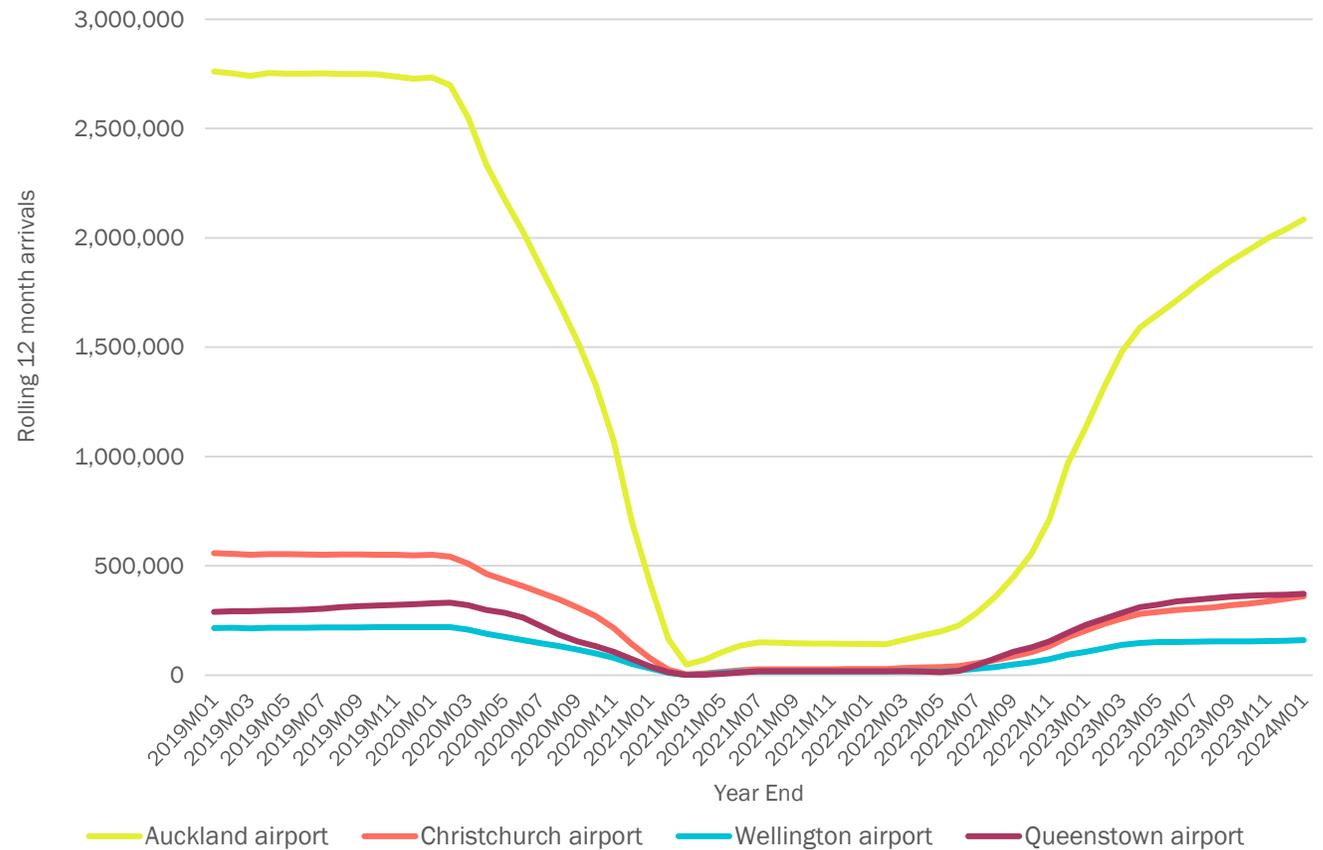


	Business	vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
January 2024	1,127	-6.9%	25,647	47.0%	6,938	34.2%	37,535	38.9%
YE January 2024	13,627	77.6%	172,237	186.6%	65,879	62.2%	283,842	133.1%

Auckland has seen a 83.9% increase in international visitor arrivals over the last year

- In the five years preceding the arrival of Covid in 2020, all major airports had seen steady increases in international visitor arrivals.
- The Covid-related travel bans had a clear effect on all ports with the greatest impact seen in Auckland reflecting the largest market share.
- However, with NZ borders fully open (since July 2022), Auckland has seen an 83.9% increase in international visitor arrivals over the last year.
- For the year ending January 2024, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 62.3%, Christchurch was up 77.4% and Wellington was up 49.3% compared to last year.

12 month rolling visitor arrivals





Auckland Tourism – Accommodation Data

723.1k total guest nights in commercial accommodation in January 2024, up 5.2%

- For the month of January 2024, there were **723.1k total guest nights** in commercial accommodation in Auckland, up **5.2%** on the same month last year.
- There were **396.9k domestic guest nights** in commercial accommodation (**down 7.8**), and **326.2k international guest nights (up 27.1%)** in commercial accommodation in January 2024.
- For New Zealand overall, there were 5.02m guest nights in commercial accommodation in January 2024, up 4.3% compared to January 2023.

Guest nights in commercial accommodation - Auckland



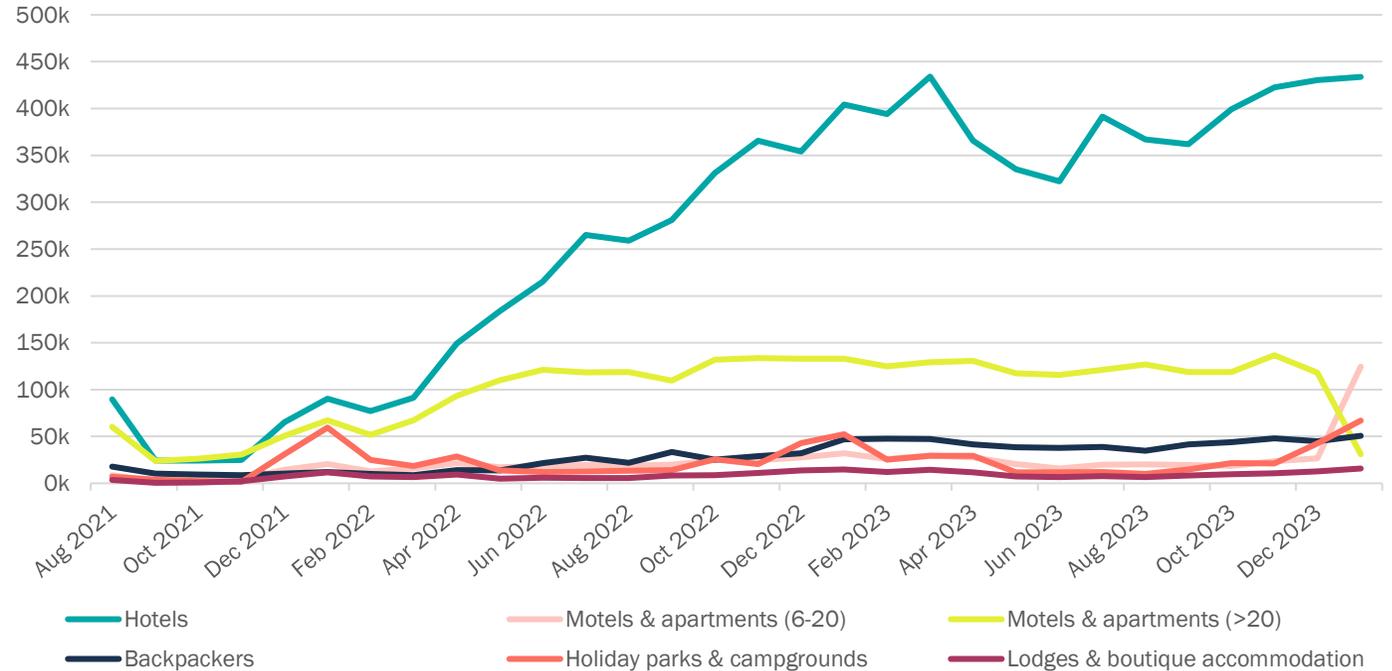
January 2024	Auckland	% change	New Zealand	% change
Total guest nights	723,100	5.2%	5,020,200	4.3%
Domestic guest nights	396,900	-7.8%	3,388,100	-1.9%
International guest nights	326,200	27.1%	1,632,100	20.3%

433.7k guest nights in hotels in January 2024, up 7.3%

- For the month of January 2024, there were 433.7k guest nights in hotels in Auckland, up 7.3% compared to January last year.
- There were 124.4k guest nights in motels and apartments (6-20), up 286.3% on the previous year.
- However, guest nights in motels and apartments (>20) (31.2k) were down (76.5%).
- Guest nights in holiday parks and campgrounds (67.0k) were up (27.9%) for the month of January.
- Guest nights in backpacker accommodation increased (up 8.1% to 50.8k) in January 2024.
- Guest nights in lodges and boutique accommodation were also up (6.7% to 15.9k) for the month.

aucklandunlimited.com

Guest nights by accommodation type (monthly)



January 2024	Guest nights	% change
Hotels	433,700	7.3%
Motels & apartments (6-20)	124,400	286.3%
Motels & apartments (>20)	31,200	-76.5%
Backpackers	50,800	8.1%
Holiday parks & campgrounds	67,000	27.9%
Lodges & boutique accommodation	15,900	6.7%

Average Occupancy for January 2024 was 66.6%, up 4.9% on 2023

- For the month of January 2024, the **average Occupancy was 66.6%, 4.9% higher** compared to January 2023.
- The **Average Daily Rate (ADR) for the month was \$231, down 6.2%** on last year.
- **Monthly Revenue per available room (RevPAR) for January was \$154, 2.2% lower** compared to last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in January 2024. ADR peaked on Wednesday 3rd January while Occupancy and RevPAR peaked on Friday 5th January 2024.

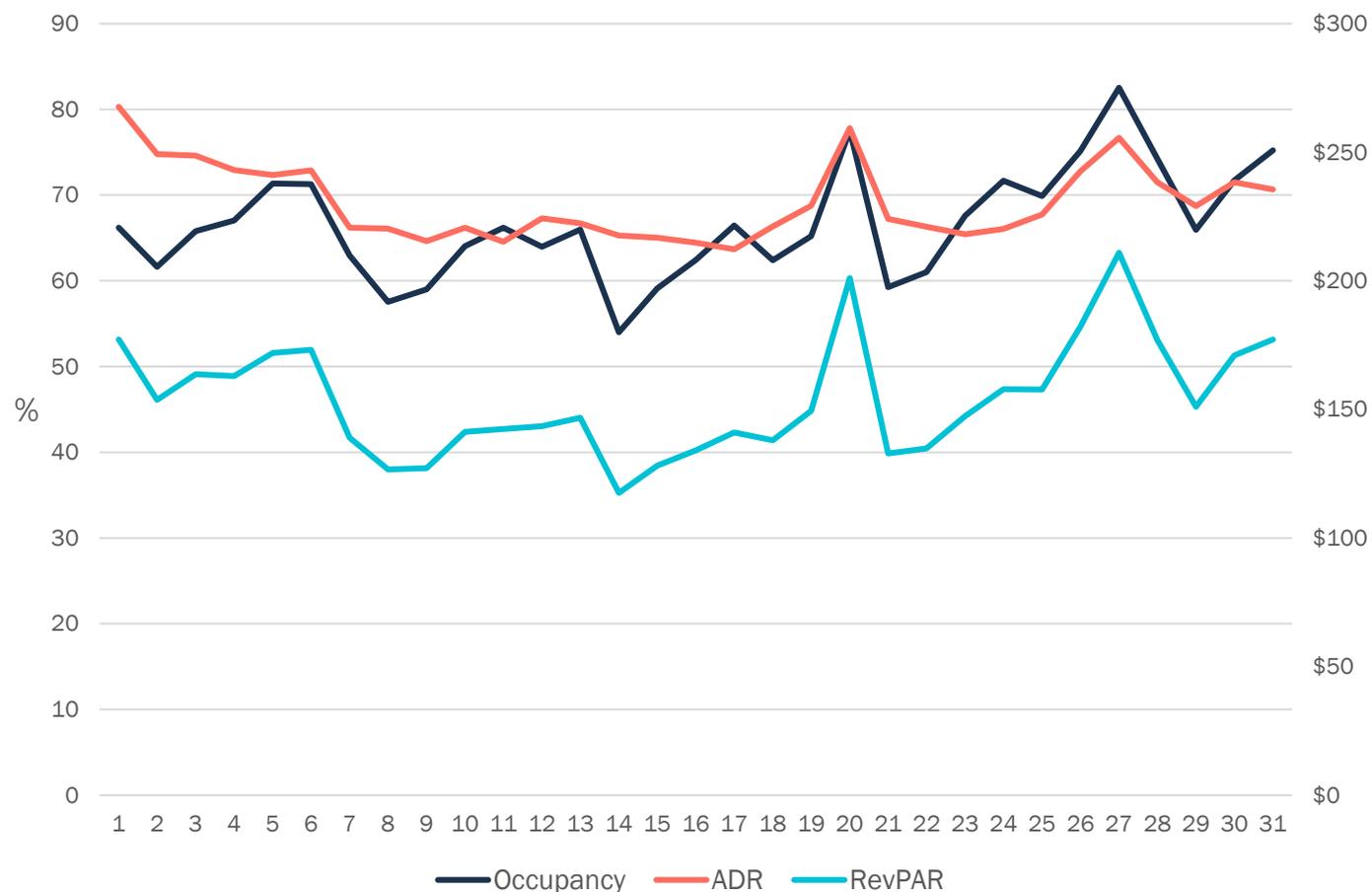
Percent Changes for the Month of January



Average daily rate was \$268 on 1st January 2024, up 2.5% on 2023

- The **average daily rate (ADR)** for hotels in Auckland was the highest for the month on **Monday 1st January 2024 at \$268** (up 2.5% on the previous year). This is when the ASB Classic event commenced.
- **Hotel occupancy reached 82.5%** on **Saturday 27th January 2024** (up 3.5% on the previous year), which was the weekend of Auckland Anniversary.
- **Revenue per available room (RevPAR) peaked to \$211** also on **Saturday 27th January 2024**. However, this was down 14.2% in comparison to last year.

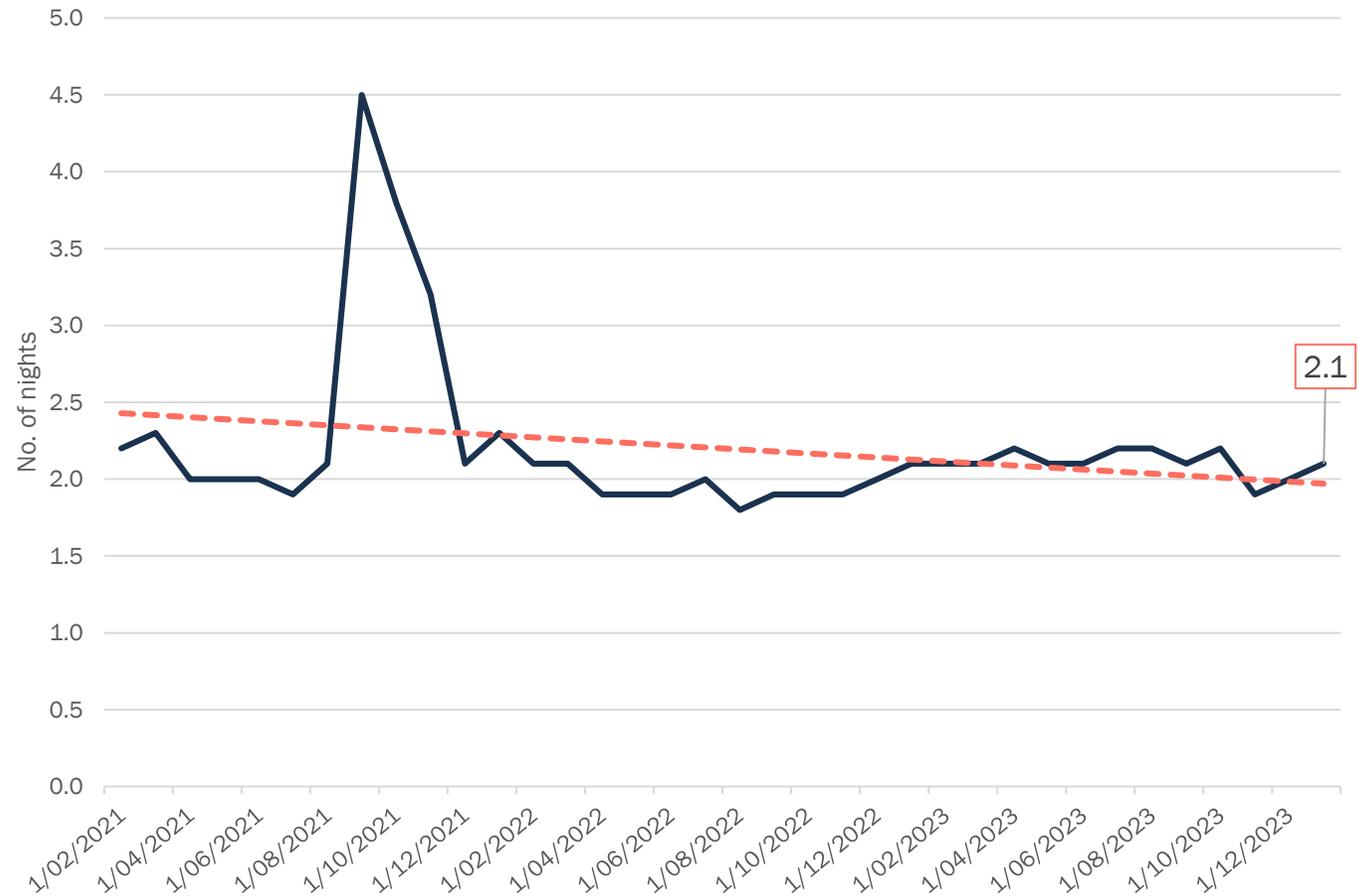
Daily hotel rates for the Month of January



On average, visitors stayed 2.1 nights in Auckland for the month of January 2024

- On average, visitors stayed in Auckland for 2.1 nights for the month of January 2024 (no change on the previous year).
- There has been a slight downward trend in average length of stay for visitors to Auckland over the last three years.

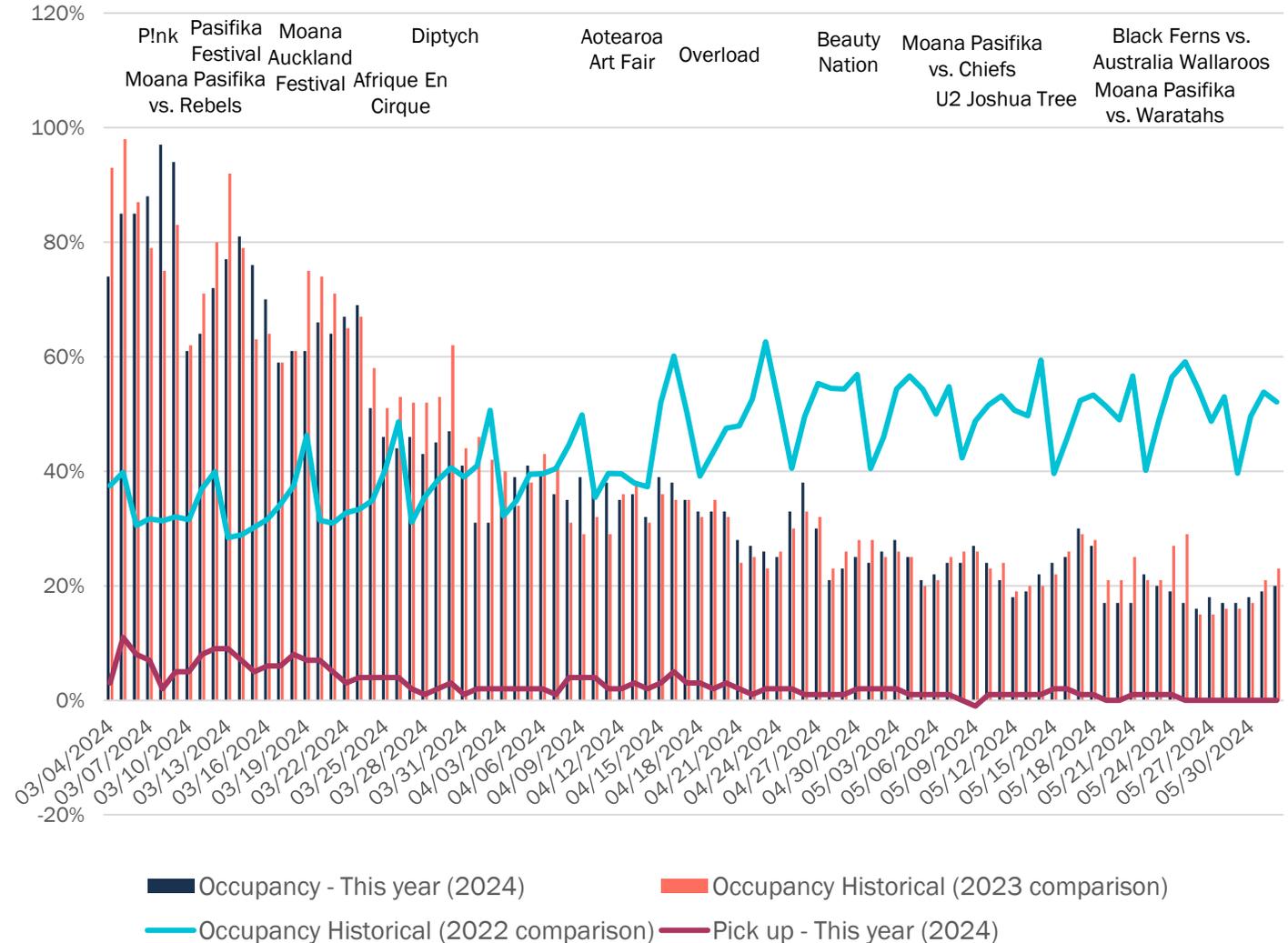
Average length of stay for visitors to Auckland



90 Day Forward Booking Occupancy Data

- Looking forward (over the next twelve months), overall occupancy on the books is generally higher for the period from March 2024 to February 2025 in comparison to last year.
- Average monthly occupancy is currently lower for March, May and August 2024 than the same months in 2023.
- There is considerable variance in hotel occupancy when comparing the next three months of 2024 to last year.
- Occupancy on the books peaked at 97% on Friday 8th March 2024, when P!NK performed at Eden Park.
- Occupancy also reached 94% on Saturday 9th March 2024.

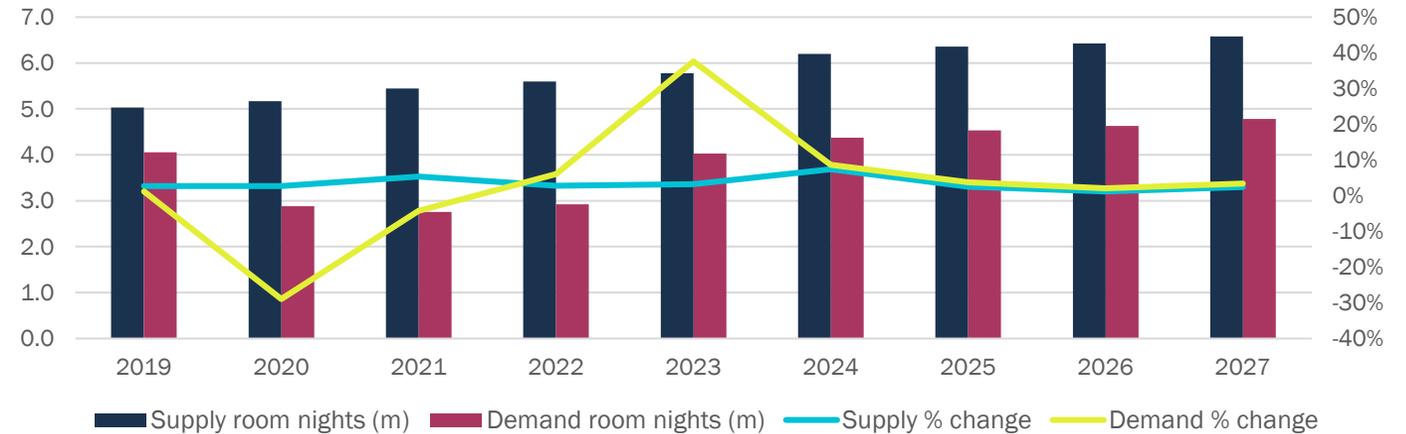
Occupancy - 90 Day Forward Outlook



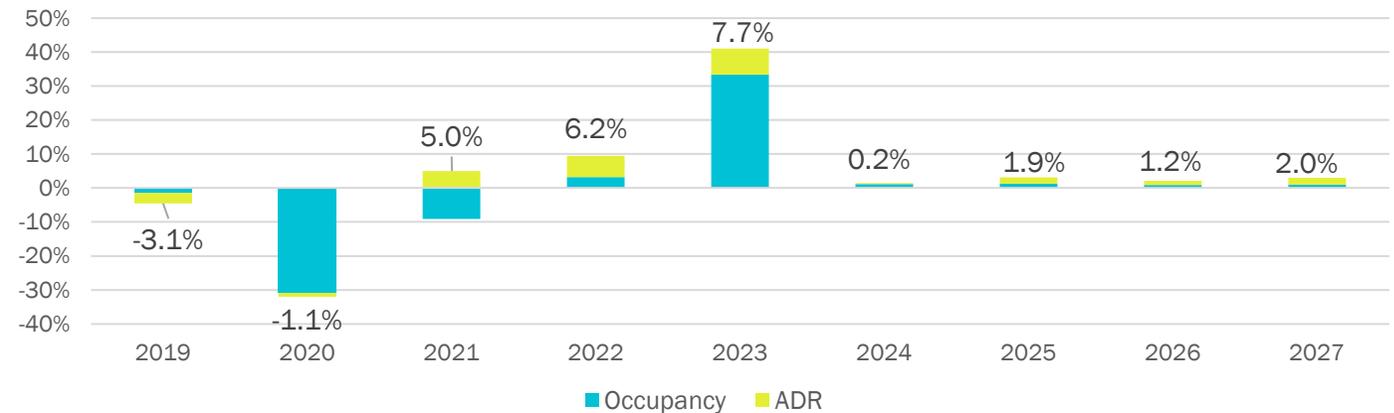
Longer term projections

- In addition to the STR Global 90 Day Forward Booking data we receive, we also receive a longer-term outlook, with forecast data for the next four years until 2027. This data is provided by STR Global in collaboration with Oxford Tourism Economics.
- In 2023 Q3 supply expanded 2.5%. Demand expanded 33.6%, resulting in an occupancy gain of 30.3%. Occupancy is expected to grow by 10.8% in 2023 Q4, with supply expanding 3.6% and demand expanding 14.8%.
- After expanding 3.2% in 2022, occupancy is expected to expand 33.3% in 2023. ADR is expected to increase 7.7%, resulting in RevPAR growth of 43.6% in 2023. RevPAR is expected to grow by 1.4% in 2024.
- Over the next three years, occupancy is expected to expand at an average annual rate of 10.9%, while ADR is expected to expand at an average annual rate of 3.2%.

Supply and Demand Growth



RevPAR Growth Composition



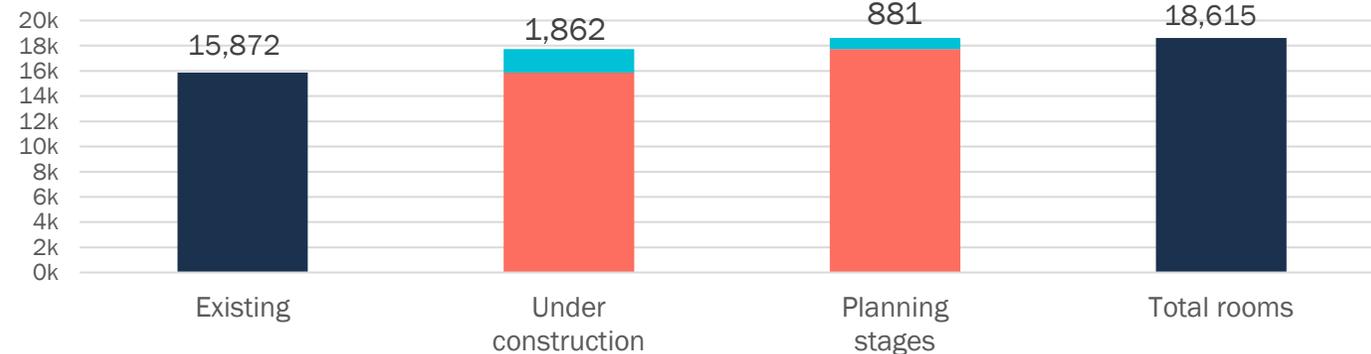
15.8k average daily rooms available in 2023, with 17.0k rooms forecast for 2024

- In 2023, on average there were 15.8k daily rooms available in Auckland. The number of average daily rooms available is set to increase by 3.2%, which will supply an additional 494 rooms (compared to 2022) .
- Looking to 2024, average room supply is expected to expand 7.4%, supplying 1.2k new rooms and bringing the total number of rooms to 17.0k.
- Observing rooms by phase data, there was a total of 18,6k rooms (from 226 properties) in the pipeline.
- This comprised of 15.9k existing rooms (from 210 properties), 1.9k rooms under construction (from 11 properties), and 881 rooms in the planning stages (from 5 properties).

Average Supply
(Avg. daily rooms during year)

	Year	Rooms	% Chg.	Chg.
Actual	2019	13,786	2.7%	360
	2020	14,161	2.7%	375
	2021	14,920	5.4%	759
	2022	15,329	2.7%	409
Forecast	2023	15,823	3.2%	494
	2024	16,987	7.4%	1,164
	2025	17,408	2.5%	421
	2026	17,605	1.1%	197
	2027	18,030	2.4%	425

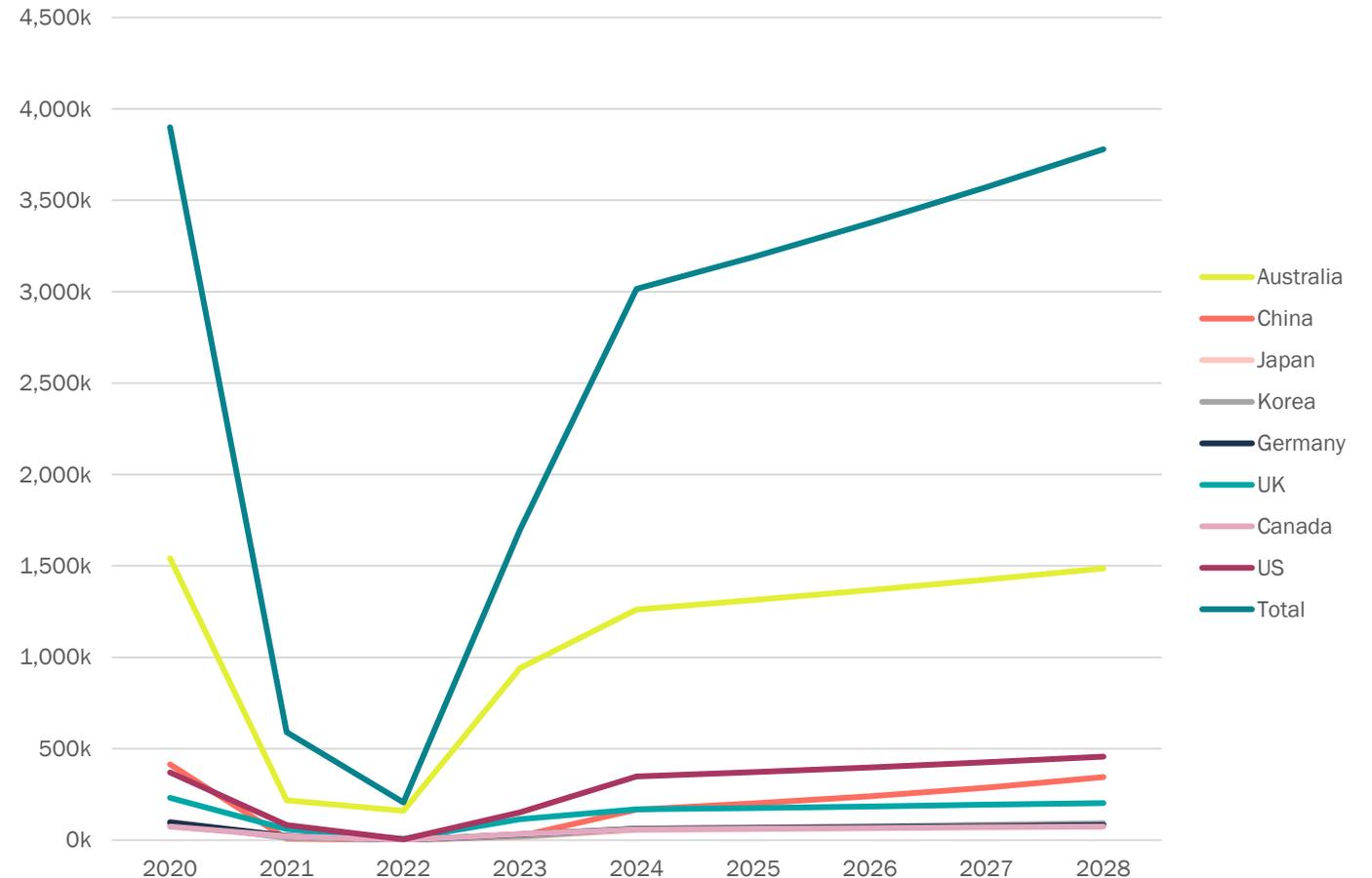
Rooms by phase



In total, 3.78m visitors are projected to visit New Zealand in YE January 2028

- International overnight visitor arrival projections until 2028 are available for New Zealand overall – of which Auckland receives the largest share.
- International visitor growth to New Zealand is forecast with a Compound Annual Growth Rate (CAGR) of 29.1% from 2023 to 2028 (for Q3 2023), resulting in a possible 3.78m international visitors by YE January 2028.
- When calculated against the 2022 baseline a clear recovery trend in visitor arrivals is visible overall – as well as for our key markets.
- Visitor arrivals from Australia are expected to grow at an average annual rate of 4.2%. 1.49m Australian visitors are expected to visit New Zealand in the year to January 2028 (bringing visitation close to pre-Covid levels of 1.54m in 2020).

International visitor growth - New Zealand



* International visitation by city is based on the Global City Travel (GCT) database maintained by Tourism Economics. GCT tracks overnight visits by international visitors to 300 global cities. The data is tracked by country of origin on an annual basis, including historical and forecast years. The data shown here for the country is taken from the Global Travel Service (GTS) database, also maintained by Tourism Economics. This reflects international visitation by origin market, including historical and forecast years.

Spend Data

- At present, we cannot display current spend data from the Monthly Regional Tourism Estimates (MRTEs) as this dataset has been paused (due to the disestablishment of Data Ventures – a branch of Stats NZ which occurred in December 2023).
- Historical MRTE spend data (until October 2023) is still available and can be found [here](#).
- The Ministry of Business, Innovation, and Employment (MBIE) and Stats NZ are working together to explore alternative options to restore the MRTE.
- Regional spend data for domestic and international visitors to Auckland will be reported again once the issue has been remedied.





Auckland – Major Events Data

Major Events Insights – Jan 2024



Event	Date	Venue	Interesting Findings
Ocean Globe Race	16 December 2023 – 14 January 2024	Waitematā Harbour	<ul style="list-style-type: none"> The month of January saw 219.0k international visitors, up 27.3% on January 2023.
Kiwi Slip n Slide	21 December – 7 January 2024	Western Springs Stadium	<ul style="list-style-type: none"> For the month of January 2024, there were 326.2k international guest nights (up 27.1%) in commercial accommodation in and 723.1k total guest nights (up 5.2% on the same month last year).
ASB Classic	1 – 13 January 2024	ASB Tennis Arena	<ul style="list-style-type: none"> The average daily rate (ADR) for hotels in Auckland was the highest for the month on Monday 1st January 2024 at \$268 (up 2.5% on the previous year). This is when the ASB Classic event commenced.
Juicy Fest	6 January 2024	North Harbour Stadium	
Sunsetter – Food Wine & Music Festival	20 January 2024	North Harbour Stadium	
Red Bull Cliff Diving World Series: Auckland, NZ	28 January 2024	Jellicoe Harbour	

ASB Classic Key Insight



ASB Classic

The [ASB Classic](#) is New Zealand's premier tennis tournament played at the ASB Tennis Arena in Auckland. It features world-class tennis players, plus fashion, food and live entertainment.

Key Insight

- **40k+ tickets sold**, all time sales record for the event (4.7% ahead of 2020 event).
- **Estimated total attendance 92.3k**, up 2% on 2023 event (includes competitions, officials, players, volunteers, catering staff, etc.).
- **85% of sessions sold out.**
- **24% of attendees from outside of Auckland.**
- **Largest customer age group was 25-34** surpassing the 45-54 age group for the first time.
- **56% attendees were female.**
- **\$461.5k media value with 19.4m impressions.**

Forecasted to generate (results due end of March 2024)

- **\$3.6m GDP**
- **17.6k visitor nights**
- **\$7.0m event operations expenditure** in the region

aucklandunlimited.com





Auckland – Business Events Data

Business Events Insights Q4 Dec 2023



aucklandunlimited.com



Auckland attracted the highest number of business delegates (84.4k) in New Zealand in Q4 Dec 2023

Total number of business events – Regional comparison



Total number of delegates – Regional comparison

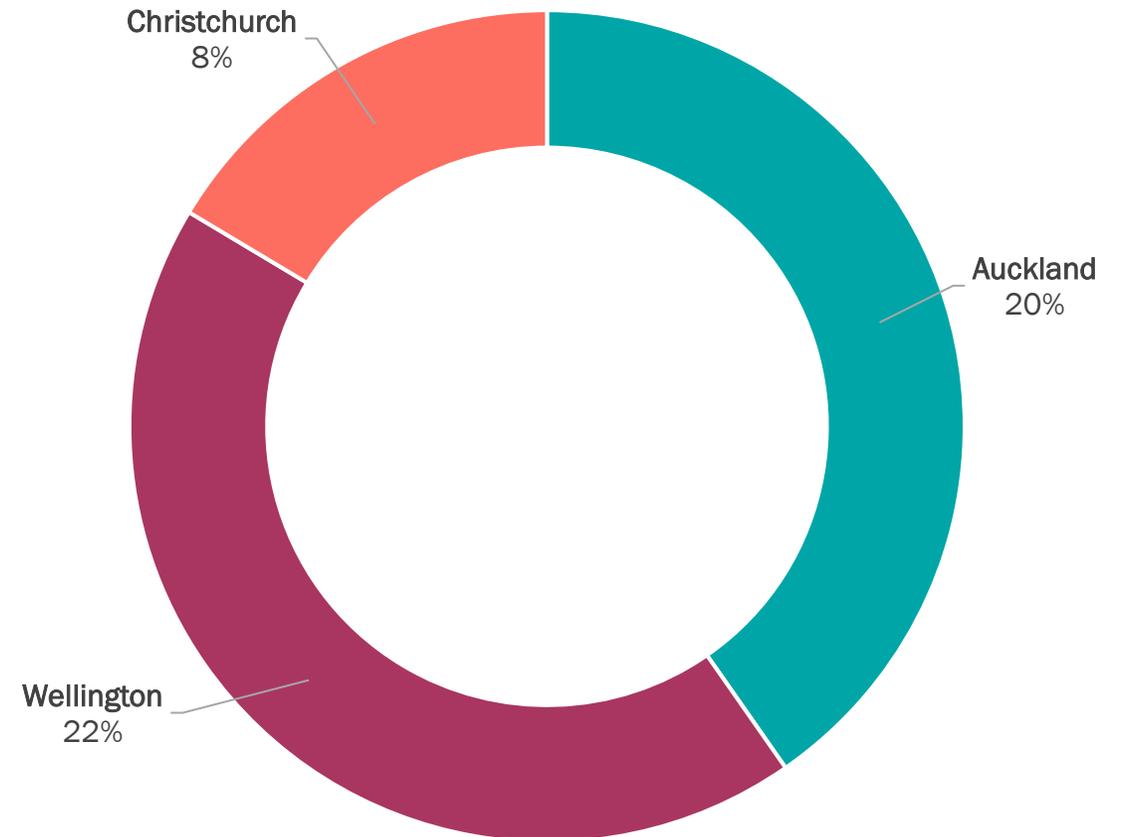


Auckland had the second largest market share of business events in NZ in Q4 Dec 2023



aucklandunlimited.com

Business Event Market Share - Regional Comparison



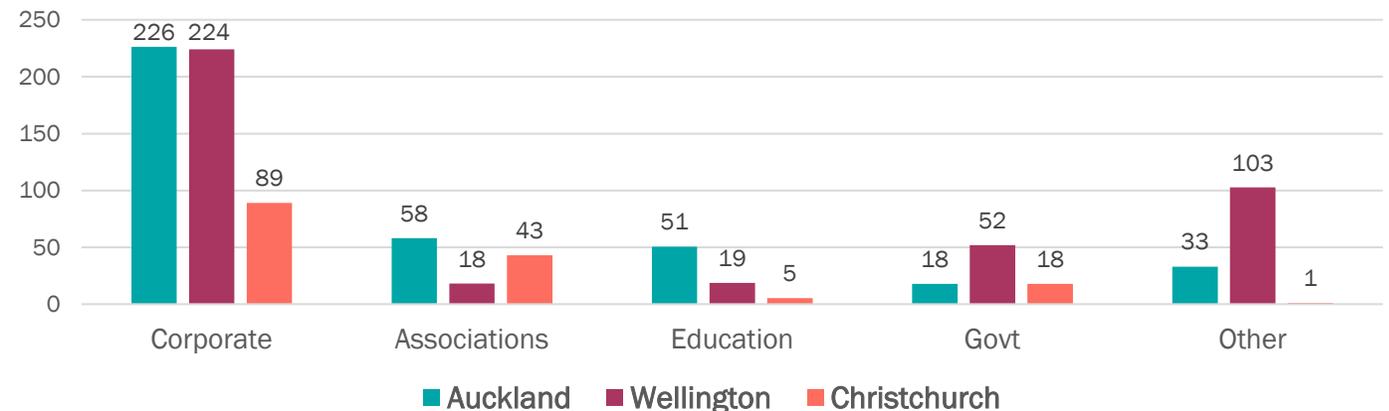
Auckland hosted the most conferences, other business events and expos in NZ Q4 Dec 2023

- Looking at business event type, **Auckland hosted the most conferences (159), other business events** like social functions and Gala dinners (116), **and expos (15)** out of the three featured regions in **Q4 Dec 2023**.
- However, Wellington held the highest number of meetings (252), followed by Auckland (77) and then Christchurch (65).
- The majority of business events in Auckland were for **Corporate customers (226), Associations (58) and Education customers (51)**.
- Among the three regions, Wellington recorded the most Government-related business events (52). This can be attributed to the fact that Wellington is home to New Zealand's Parliament.

Business Events By Event Type



Business Events By Customer Type

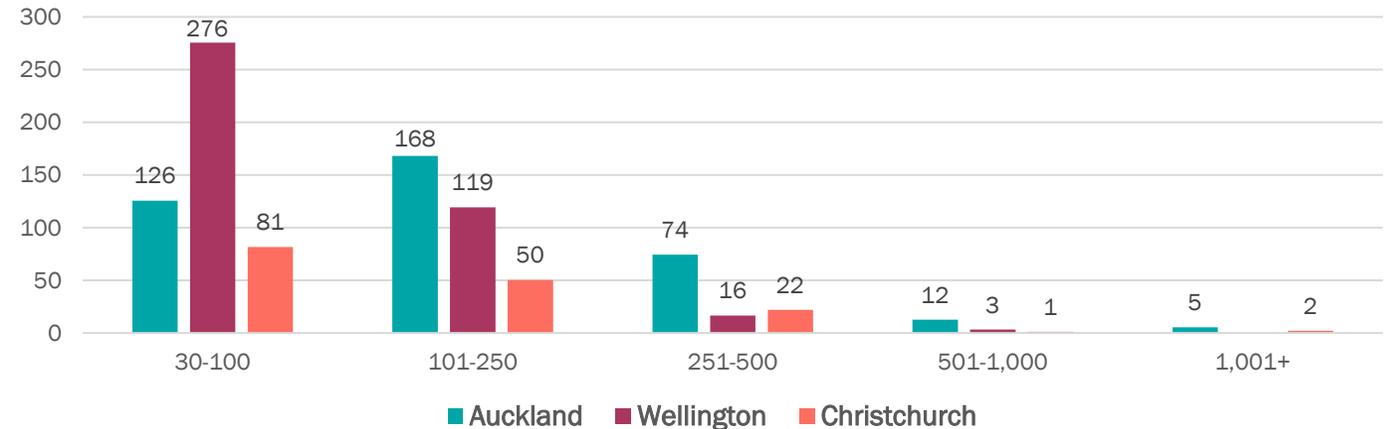


32% of all business events in Auckland were multi-day events in Q4 Dec 2023

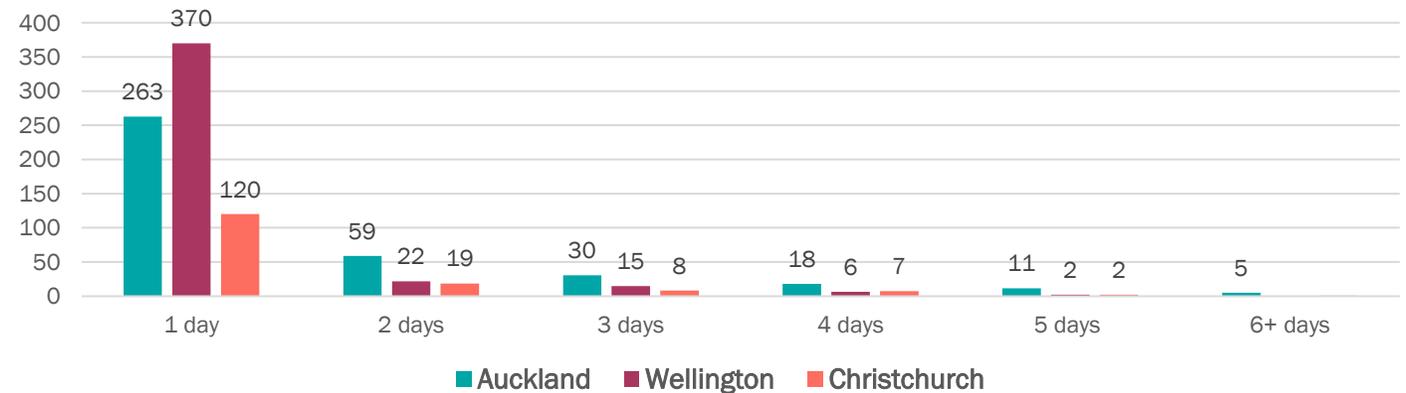
- In Q4 2023, a third of all business events held in Auckland were smaller events hosting between 30-100 delegates (126 events). In comparison to other regions, Wellington hosted most small business events (276 events).
- 44% of business events in Auckland were medium-sized events with 168 events that hosed between 101-250 delegates.
- 19% of business events (74) in Auckland hosted between 251-500 delegates.
- Auckland had 5 large-scale events that hosted over 1,000 delegates in Q4 2023.
- In Q4 2023, two thirds of all business events (68%) in Auckland were one day events (263), while 32% were multi-day events. 15% were held for a duration of two days (59), and 8% ran over the course of three days (30).

aucklandunlimited.com

No. of delegates - Regional comparison



Duration of event - Regional comparison



A scenic view of a coastline with two people standing on a grassy hill overlooking the ocean. The sky is blue with a faint rainbow. The landscape features rugged cliffs, a sandy beach, and waves crashing against the shore. Two people, one in a red jacket and one in a green jacket, are standing on a grassy slope in the foreground, looking out at the sea. The ocean is a deep blue with white-capped waves. The sky is a clear, bright blue with a faint rainbow visible in the upper left. The overall scene is a beautiful coastal landscape.

Auckland Visitor Survey

Nb. The AVS is currently on hold. The latest historical results are featured in this section.

Visitor Experience



aucklandnz.com


30%

Promoters
Net Promoter Score
YE June 2022
-3




29%

Detractors
Net Promoter Score
YE June 2022
-3




1 NPS

Total
Net Promoter Score
YE June 2022
-6




7.3 / 10

Total Satisfaction
Overall experience in
Auckland
YE June 2022
-0.1



Net Promoter Score

- The Net Promoter Score (NPS) is an index ranging from -100 to +100 that measures customer engagement and loyalty, based on the likelihood of customers to recommend a product or service.
- For domestic visitors in YE Jun 2022, **NPS was +1**, (down 6 points from YE June 2021).
- **Domestic visitors most likely to recommend Auckland** as a visitor destination include those aged 30-44 (NPS +6), Otago residents (NPS +16), those whose main reason to visit is a conference, convention or other business event (NPS +23), those travelling with a friend/s (NPS +6) and those who also include Northland in their itinerary (NPS +13).
- Inversely, those least likely to recommend Auckland as a visitor destination are those aged 18-29 years (NPS -8), those who used to live in the Auckland region (NPS -4), and those travelling with children (NPS -3) or with other members of their family (NPS -12).

PROMOTERS

30%

DETRACTORS

29%

TOTAL NPS

1

YE June 2022

-3

Compared to
YE June 2021

YE June 2022

+3

Compared to
YE June 2021

YE June 2022

-6

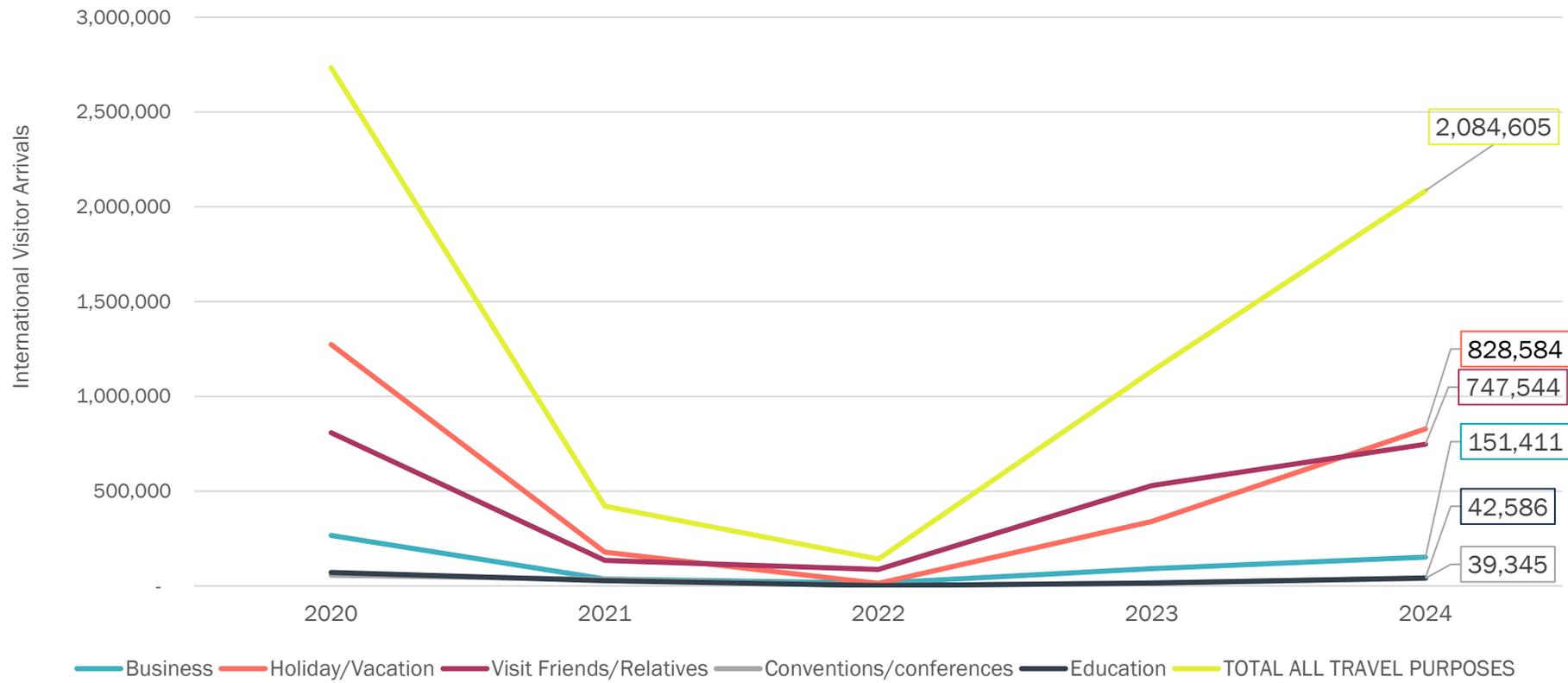
Compared to
YE June 2021

Note: YE June 2022 findings are based on domestic visitors only and are compared to YE June 2021 domestic visitor results. No data collection occurred in Q2 2020.



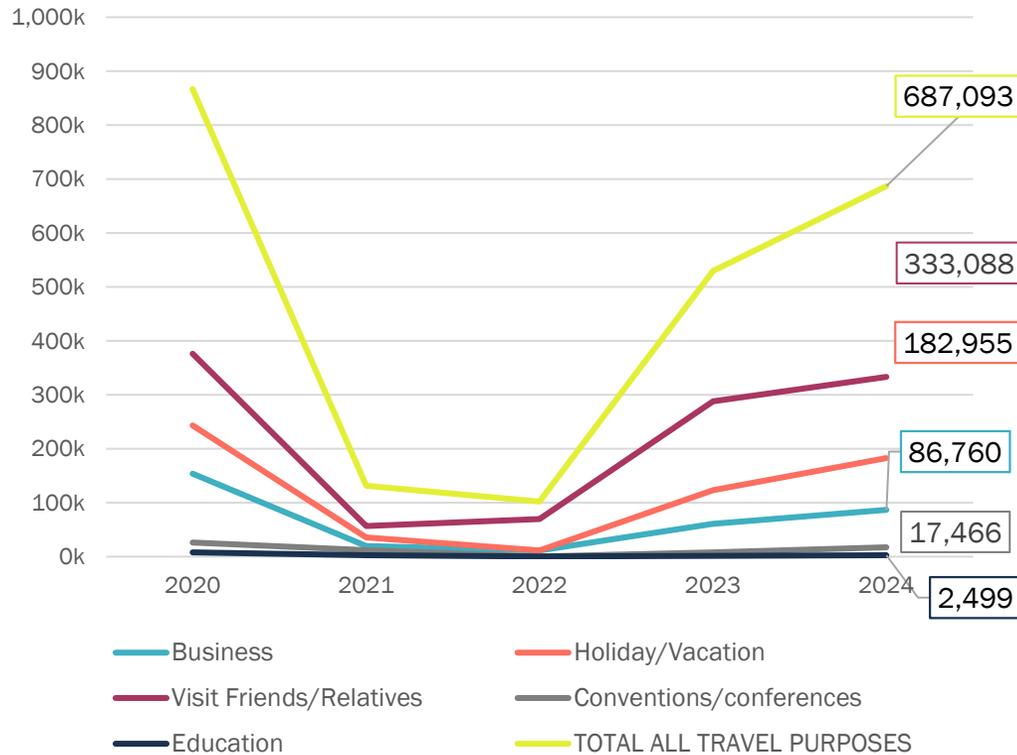
Five-year trends in key markets

Five-year visitor arrivals to Auckland, YE January

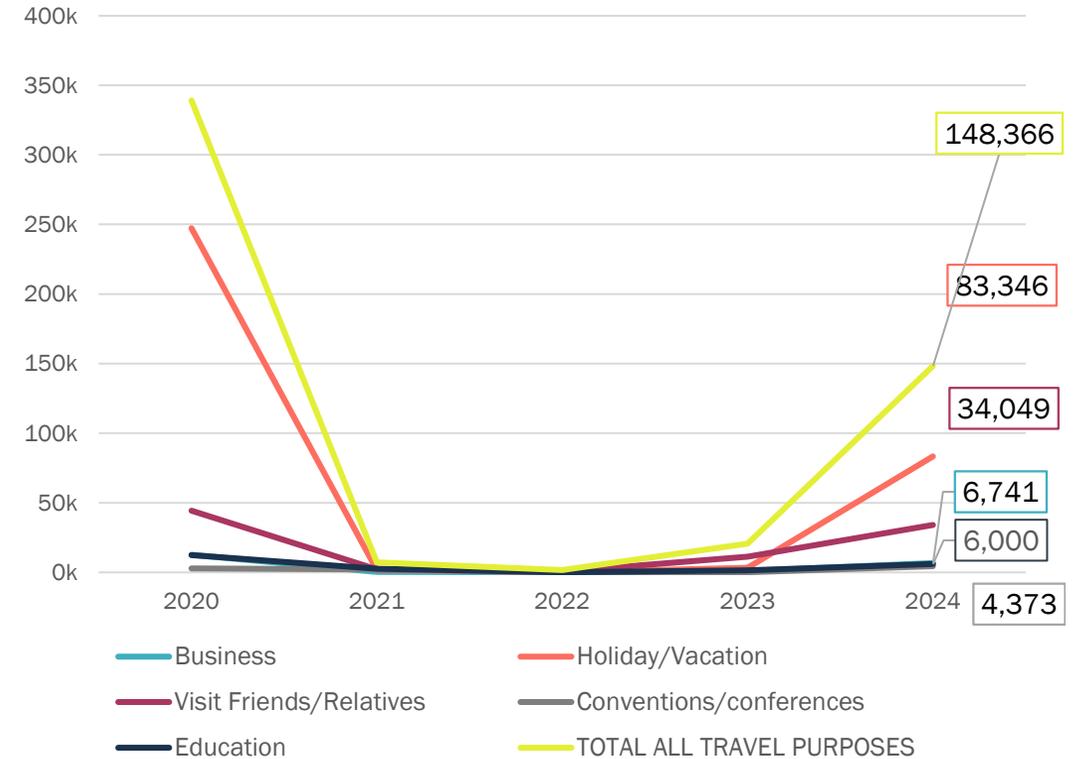


Five-year visitor arrivals to Auckland, YE January

Australia

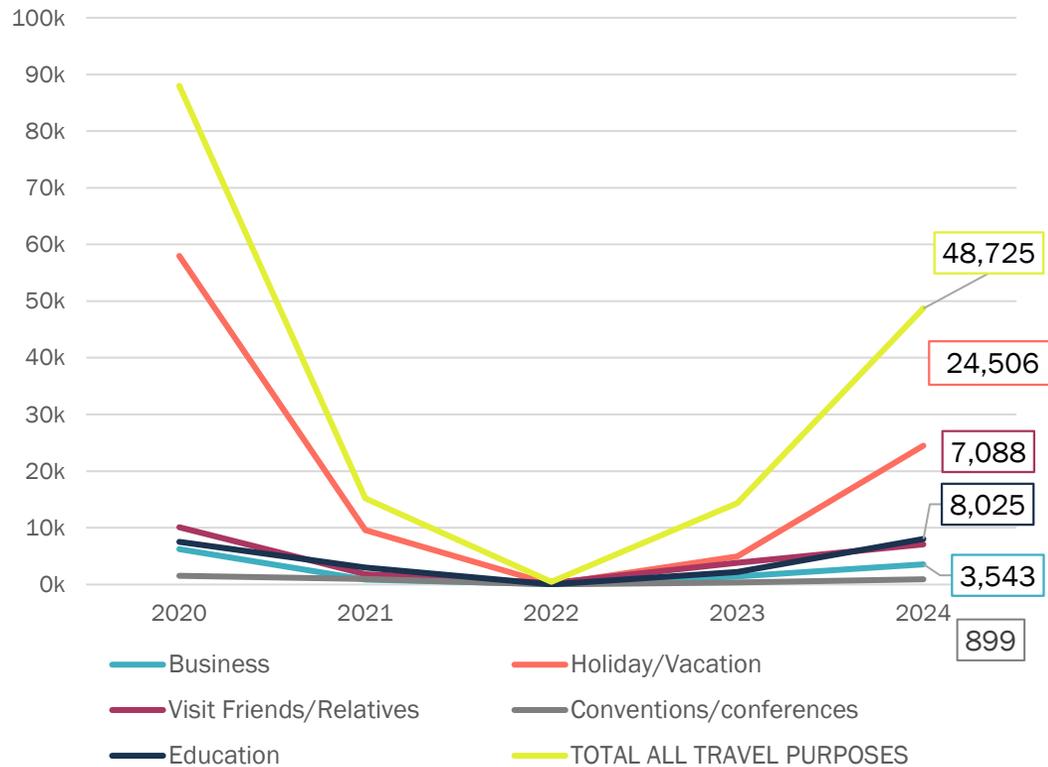


China

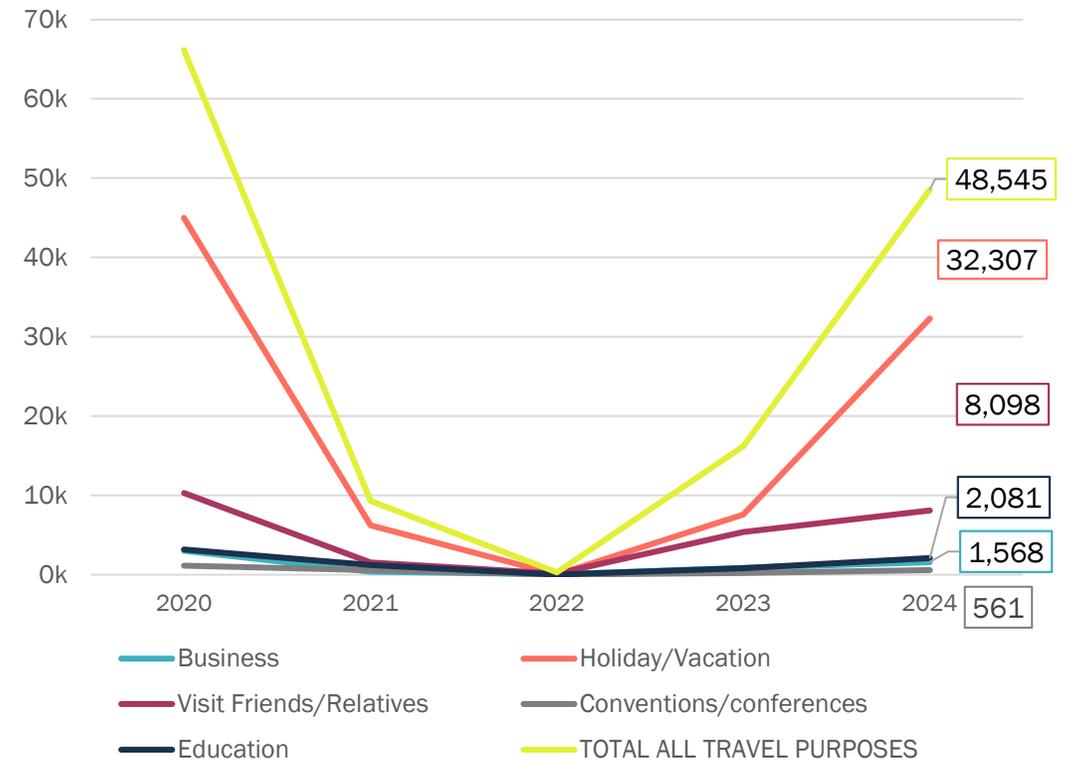


Five-year visitor arrivals to Auckland, YE January

Japan

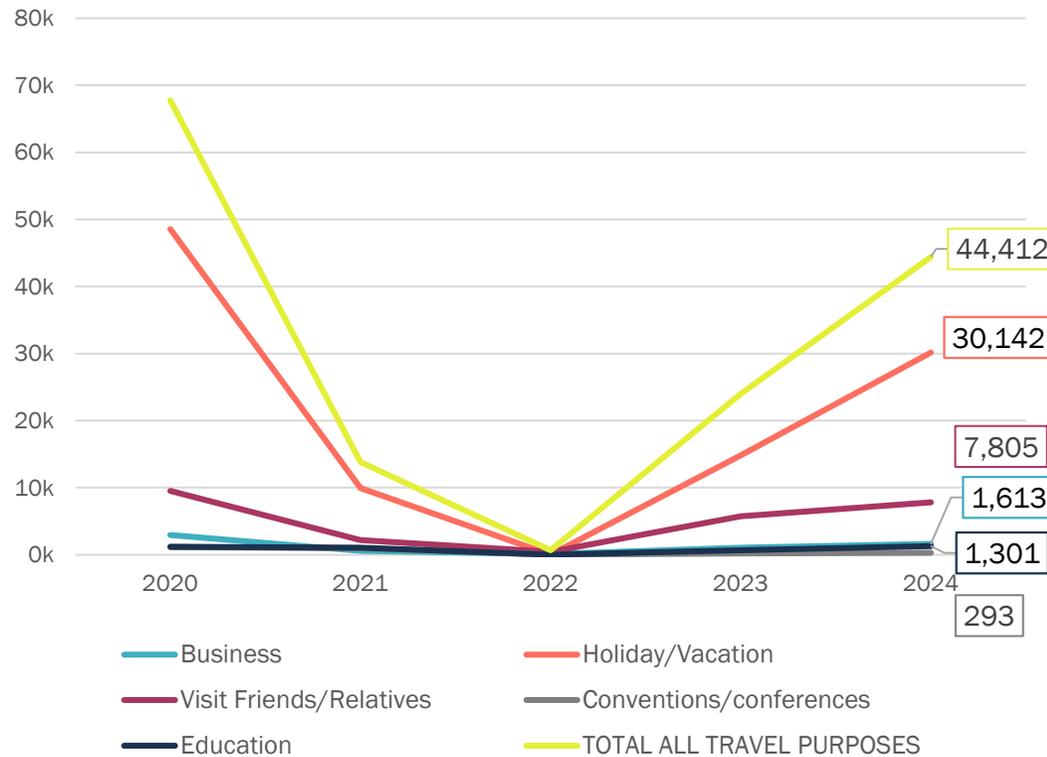


Korea

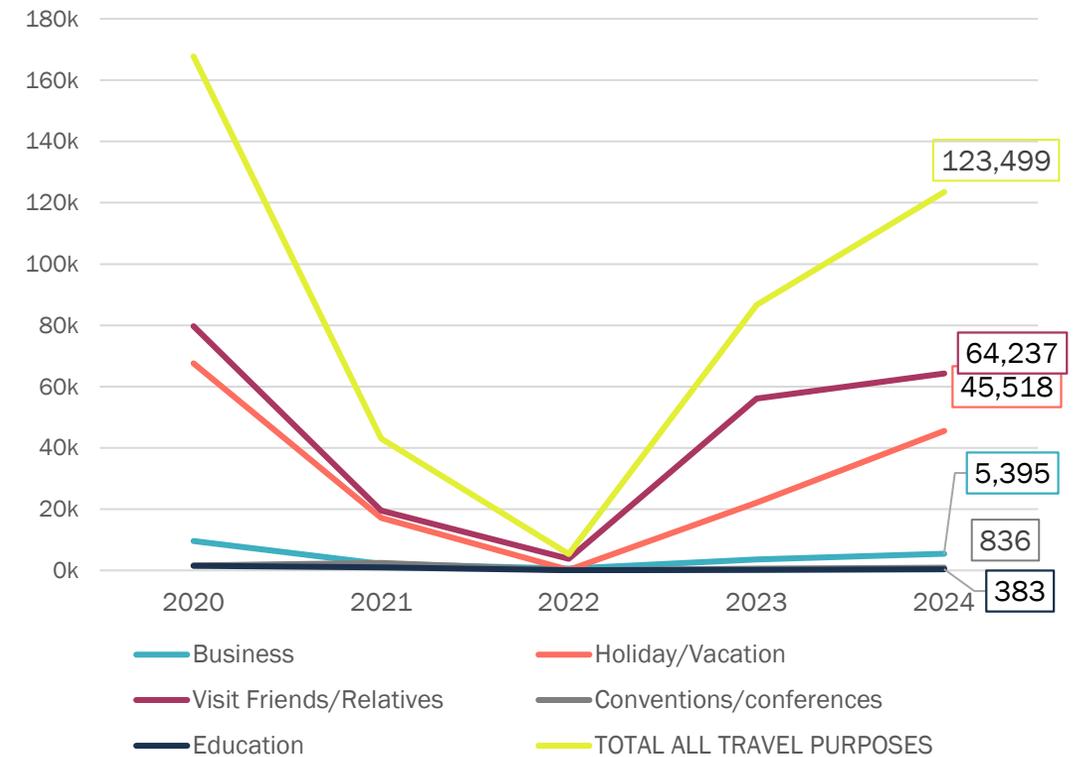


Five-year visitor arrivals to Auckland, YE January

Germany

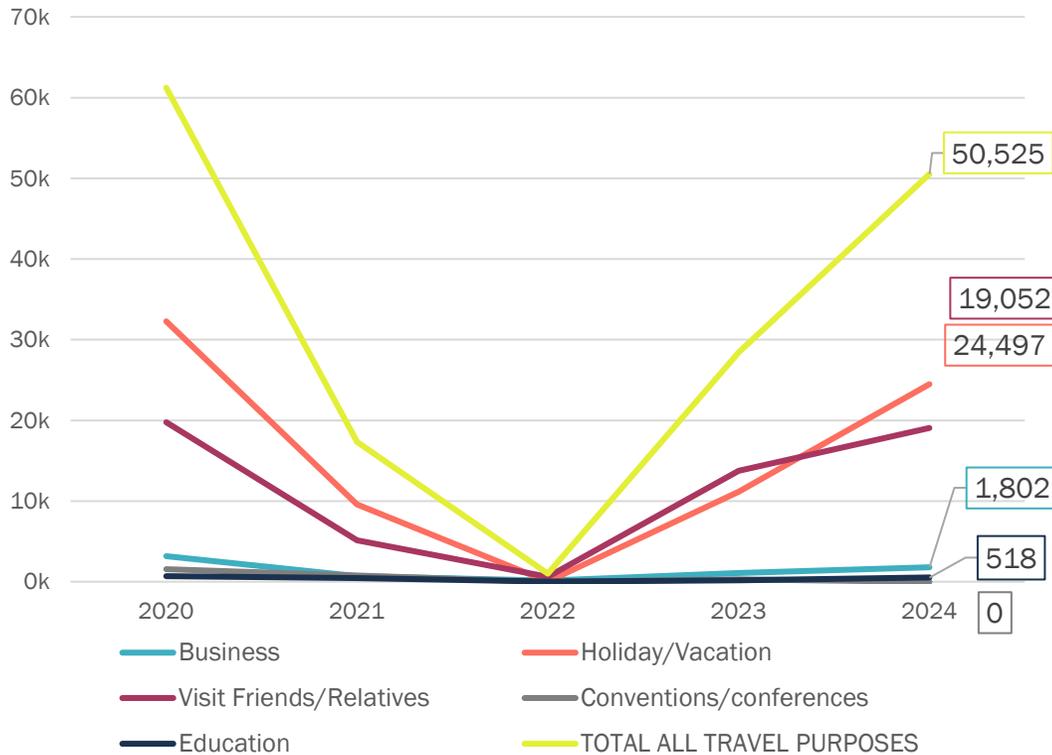


UK

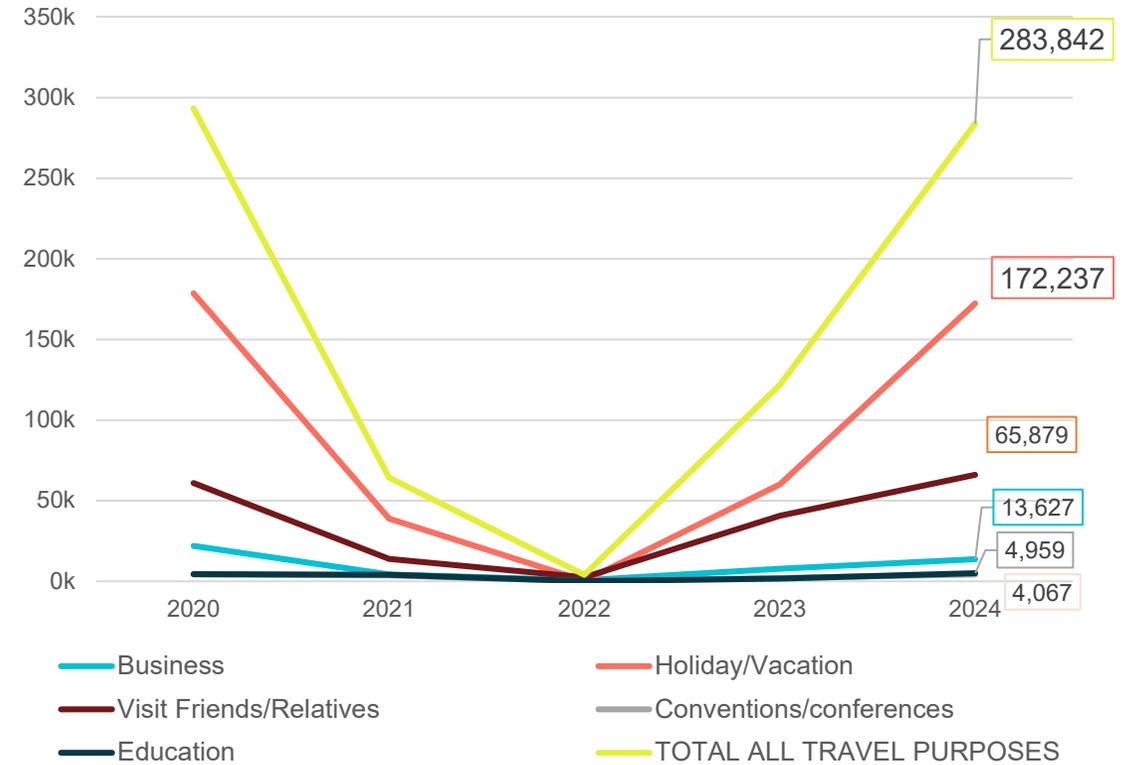


Five-year visitor arrivals to Auckland, YE January

Canada



US



Ngā mihi Thank you

- KEY CONTACT

Jaimee Raymond

Research & Insights Specialist

jaimee.raymond@aucklandnz.com

