

Tātaki
Auckland
Unlimited



Tāmaki Makaurau Auckland Destination Overview

November 2023

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

Prepared January 2024

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Key Visitor Data



INTERNATIONAL

- **Monthly international visitors (214.0k)** were up **31.8%** on November 2022 (162.3k) but numbers were down 18.9% compared to November 2019 pre-Covid (263.8k).
- **The year to November 2023** saw **2.00m international visitor arrivals, an increase of 180.3%** on 2022. However, international visitation was down 27.0% compared to pre-Covid levels (2.74m in YE November 2019).
- There was a slight increase in visitors from the **Australian market in November 2023**, with **60.9k visitors, up 0.1%** compared to last year. **The year to November 2023** saw **688.3k Australian visitors, up 85.3%**.
- **Holiday visitors (761.4k)** contributed the most to annual visitor numbers and **increased 312.4%** on the year to November 2022. **Monthly numbers (95.2k)** were **also up 58.1%** compared with November 2022.
- **VFR visitors (748.5k)** were **up 127.8% for the year**, with **monthly numbers (64.1k) also up 5.1%**.
- **265.9k international guest nights in commercial accommodation** for November, **up 53.2%** 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 **397.0k domestic guest nights in commercial accommodation** for the month of **November, down 3.1%**.
- As of the 8th February 2024, the MBIE has temporarily suspended the release of the Monthly Regional Tourism Estimates (MRTE) spend data until further notice. This means that tourism spend data for the month of November 2023 is not available.

OVERALL

- For the month of November 2023, there were **662.9k total guest nights in commercial accommodation** in Auckland, **up 13.7%** on last year.
- **On average, visitors stayed in Auckland for 1.9 nights** for the month of November 2023 (no change on the previous year).
- **Looking forward, overall occupancy on the books is higher this year** compared to the same period last year (i.e., from February to May 2024).
- Occupancy is set to reach **88%** on Wednesday 14th February 2024 (Valentine's Day) and **87%** on Tuesday 13th February 2024.
- Occupancy on the books is also set to hit **89%** on Friday 8th March 2024, when P!NK will be performing at Eden Park.
- 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%.

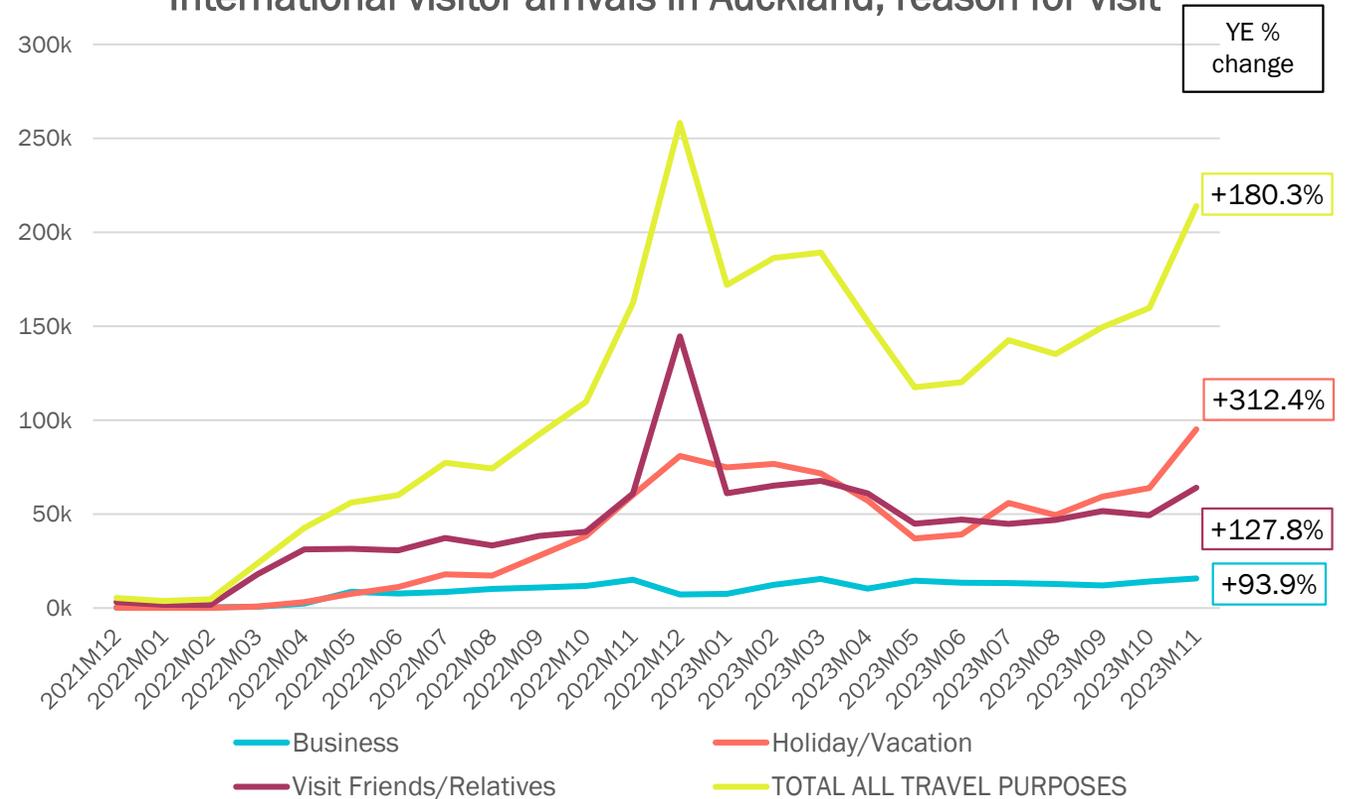


Auckland Tourism – Visitor Arrivals Data

2.00m International visitor arrivals in the year to November 2023, up 180.3%

- The month of November saw 214.0k international visitors, up 31.8% on November 2022 (162.3k) but down 18.9% compared to pre-Covid numbers (263.8k in November 2019).
- The year to November 2023 saw 2.00m international visitor arrivals, an increase of 180.3% on the previous year. However, international visitation was down 27.0% compared to pre-Covid levels (2.74m in YE November 2019).
- Holiday visitors (761.4k) contributed the most to annual visitor numbers and increased 312.4% on the year to November 2022. Monthly holiday numbers (95.2k) were also up 58.1% compared with the month of November 2022.
- VFR visitors (748.5k) were up 127.8% for the year, with monthly numbers (64.1k) also up 5.1%.
- There were 149.0k business visitors (up 93.9%) in the year to November 2023, and 15.7k for the month (up 4.0%).

International visitor arrivals in Auckland, reason for visit

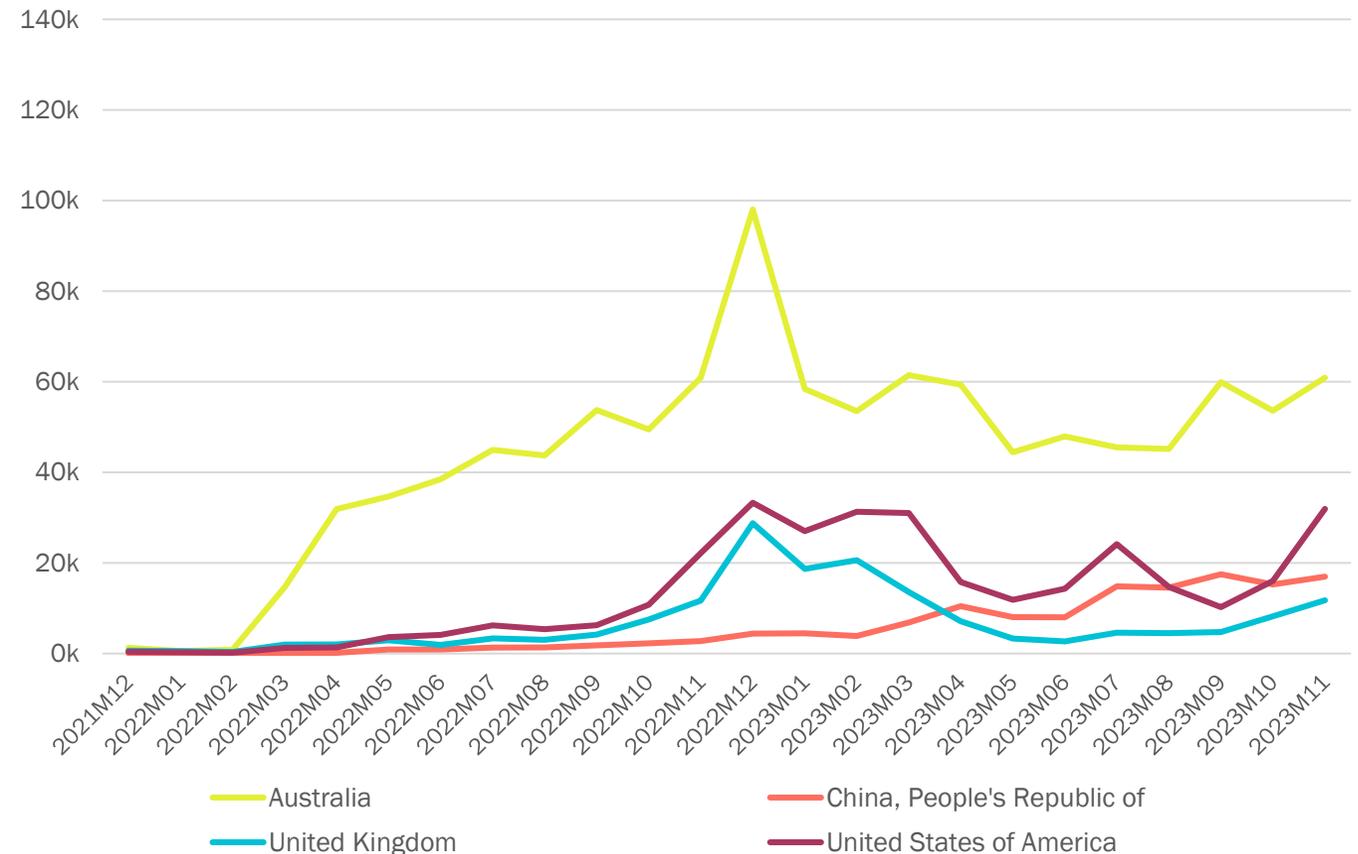


	Visitor arrivals	vs. previous year / YE	vs. pre-Covid / 2019
November 2023	213,973	31.8%	-18.9%
YE November 2023	1,997,408	180.3%	-27.0%

688.3k visitors from Australia for YE November 2023, up 83.5%

- There was a slight increase in **Australian visitors** in the month of November 2023, with **60.9k visitors, up 0.1%** compared to last November. **The year to November 2023 saw 688.3k Australian visitor arrivals, up 83.5%.**
- **The year to November 2023 saw 261.8k visitors from the US (up 321.0%), with 31.9k visitors for the month (up 44.2%).**
- **Visitors from China (125.3k) were also up for the year (953.6%), and up (517.3%) for the month of November (to 17.0k).**
- For year to November 2023, there were **128.7k visitor arrivals from the UK (up 218.9%)** and **11.8k visitors for the month (up 0.6%).**

Visitor arrivals in Auckland by key international markets

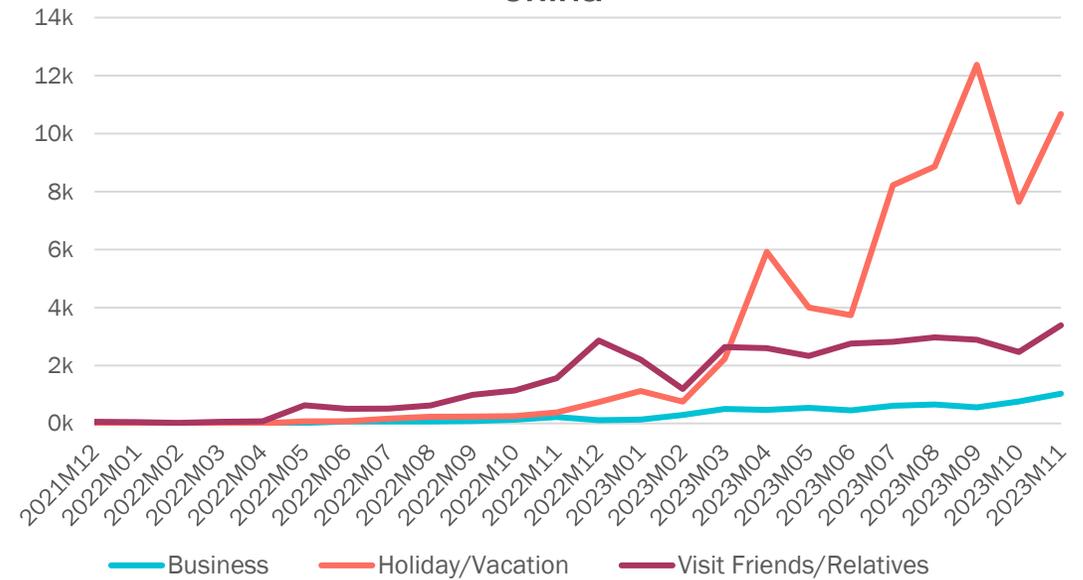


24-month visitor arrivals from individual markets

Australia



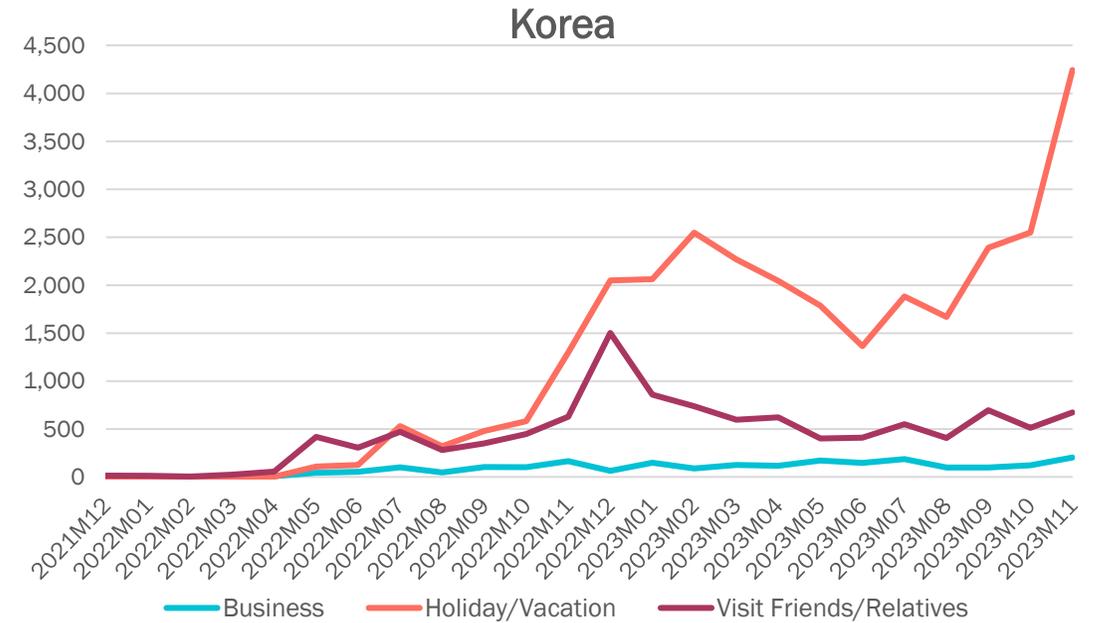
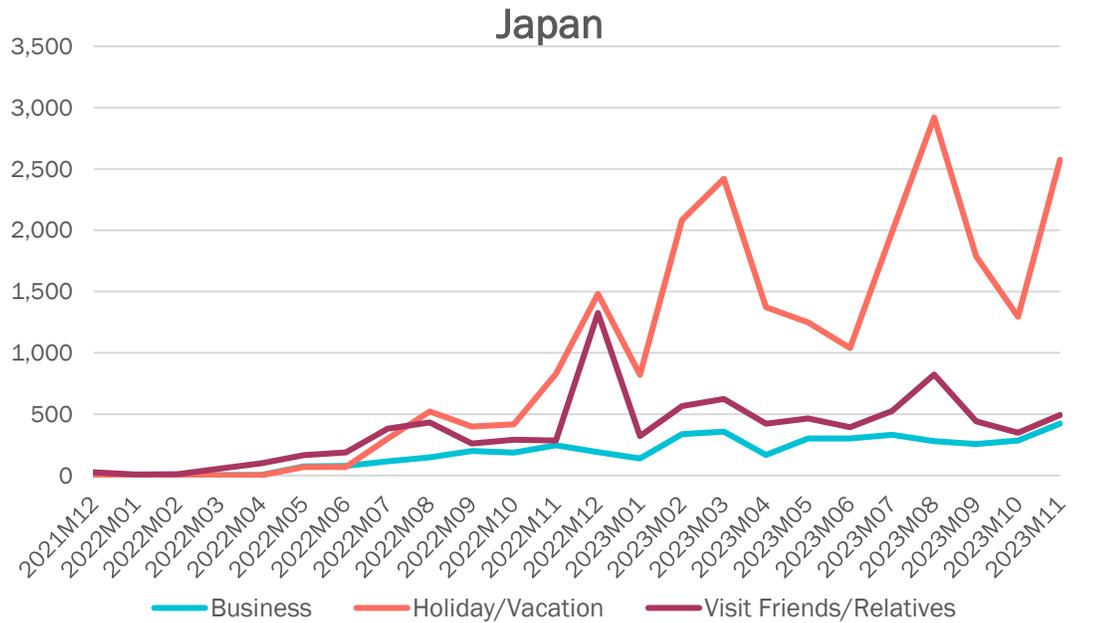
China



		vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	8,679	-6.8%	16,627	-1.4%	27,673	1.1%	60,901	0.1%
YE November 2023	85,235	59.9%	183,453	134.5%	336,124	67.5%	688,301	83.5%

		vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	1,030	360%	10,680	2703.1%	3,385	116.2%	16,975	517.3%
YE November 2023	6,123	763.6%	66,280	4490.0%	31,111	399.5%	125,268	953.6%

24-month visitor arrivals from individual markets

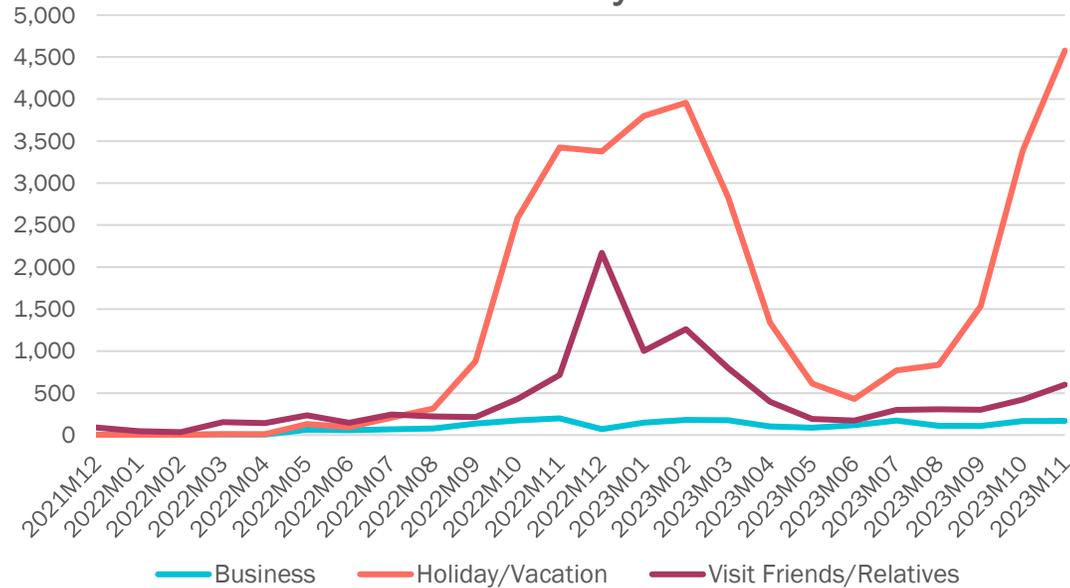


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	424	71.7%	2,574	210.5%	494	72.7%	4,444	161.0%
YE November 2023	3,375	216.0%	21,028	704.1%	6,755	205.1%	44,071	431.5%

	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	203	22.3%	4,243	226.9%	674	7.3%	5,739	139.6%
YE November 2023	1,577	148.7%	26,859	676.7%	7,971	164.0%	42,676	406.9%

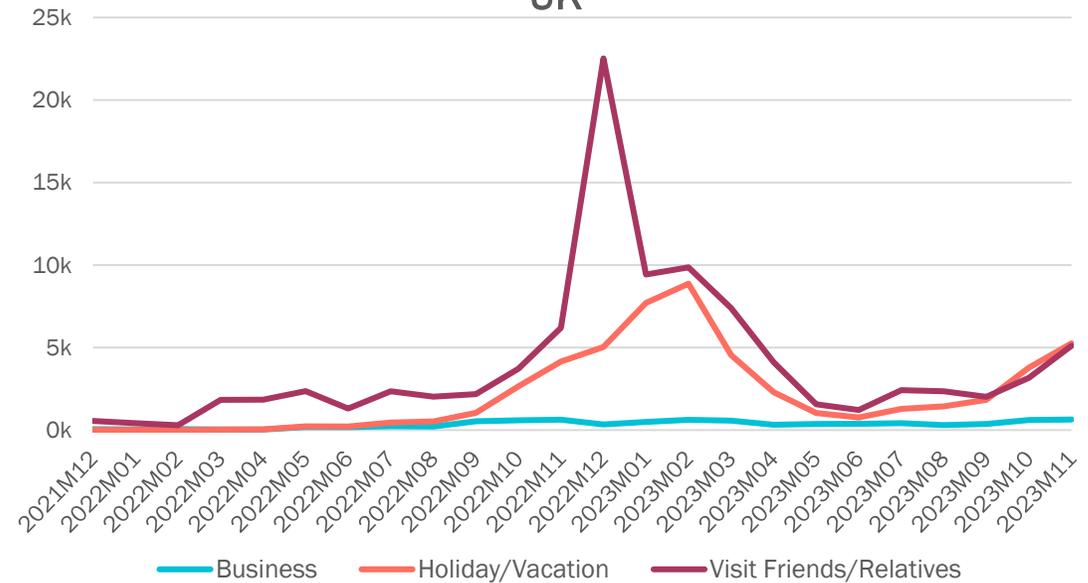
24-month visitor arrivals from individual markets

Germany



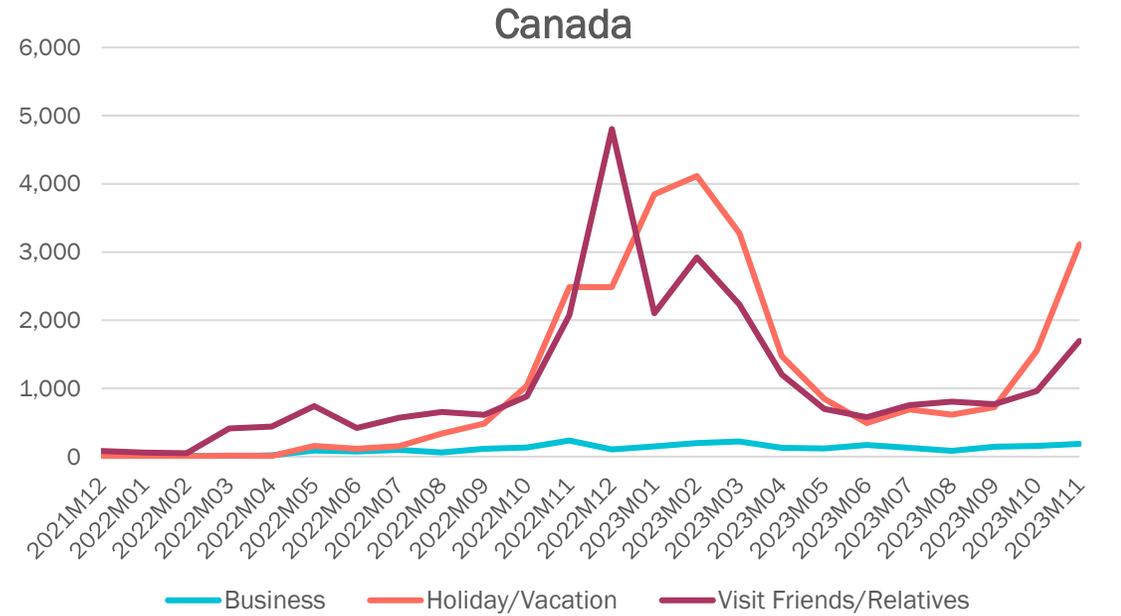
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	170	-15.0%	4,577	33.7%	601	-16.1%	5,847	25.0%
YE November 2023	1,623	96.3%	27,452	258.1%	7,927	195.6%	41,737	237.2%

UK

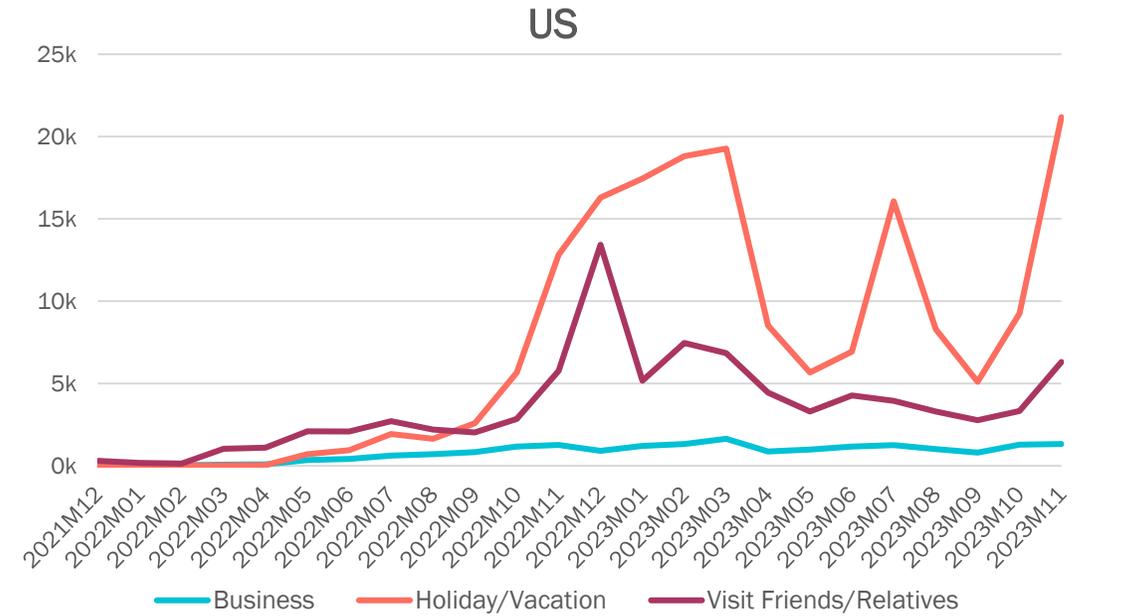


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	645	1.6%	5,261	26.6%	5,109	-17.6%	11,753	0.6%
YE November 2023	5,511	94.1%	43,879	366.3%	71,195	183.4%	128,739	218.9%

24-month visitor arrivals from individual markets



	Business	vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	188	-20.7%	3,111	25.1%	1,697	-18.2%	5,444	3.2%
YE November 2023	1,799	106.8%	23,239	382.7%	19,527	178.8%	49,708	253.4%



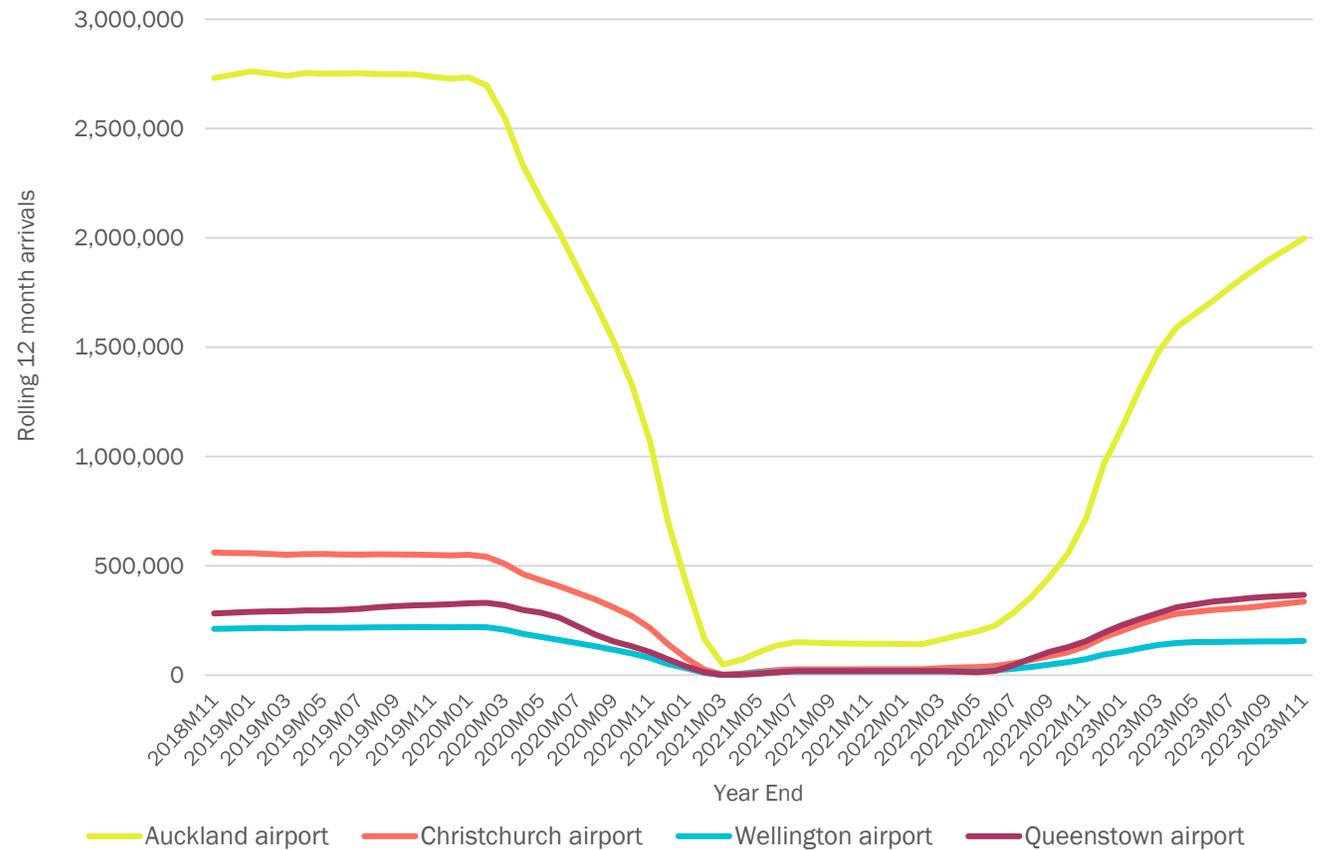
	Business	vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
November 2023	1,328	4.6%	21,178	65.2%	6,311	9.4%	31,946	44.2%
YE November 2023	13,804	145.1%	152,840	479.2%	64,589	187.2%	261,781	321.0%

Auckland has seen a 180.3% 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 a 180.3% increase in international visitor arrivals over the last year.
- For the year ending November 2023, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 137.4%, Christchurch was up 155.1% and Wellington was up 115.4% compared to last year.

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12 month rolling visitor arrivals



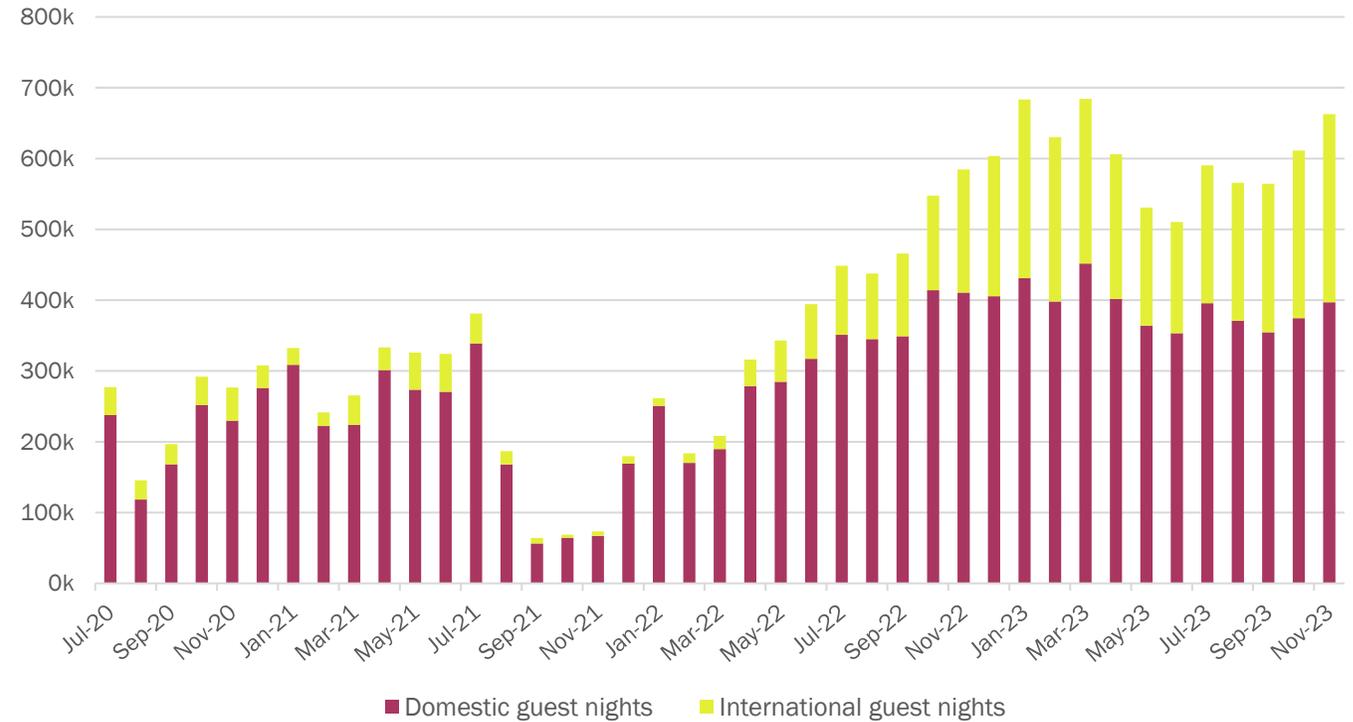


Auckland Tourism – Accommodation Data

662.9k total guest nights in commercial accommodation in November 2023, up 13.7%

- For the month of November 2023, there were **662.9k total guest nights** in commercial accommodation in Auckland, up **13.7%** on the same month last year.
- There were **397.0k domestic guest nights** in commercial accommodation (**down 3.1%**), and **265.9k international guest nights (up 53.2%)** in commercial accommodation in November 2023.
- For New Zealand overall, there were 3.37m guest nights in commercial accommodation in November 2023, up 9.1% compared to November 2022.

Guest nights in commercial accommodation - Auckland



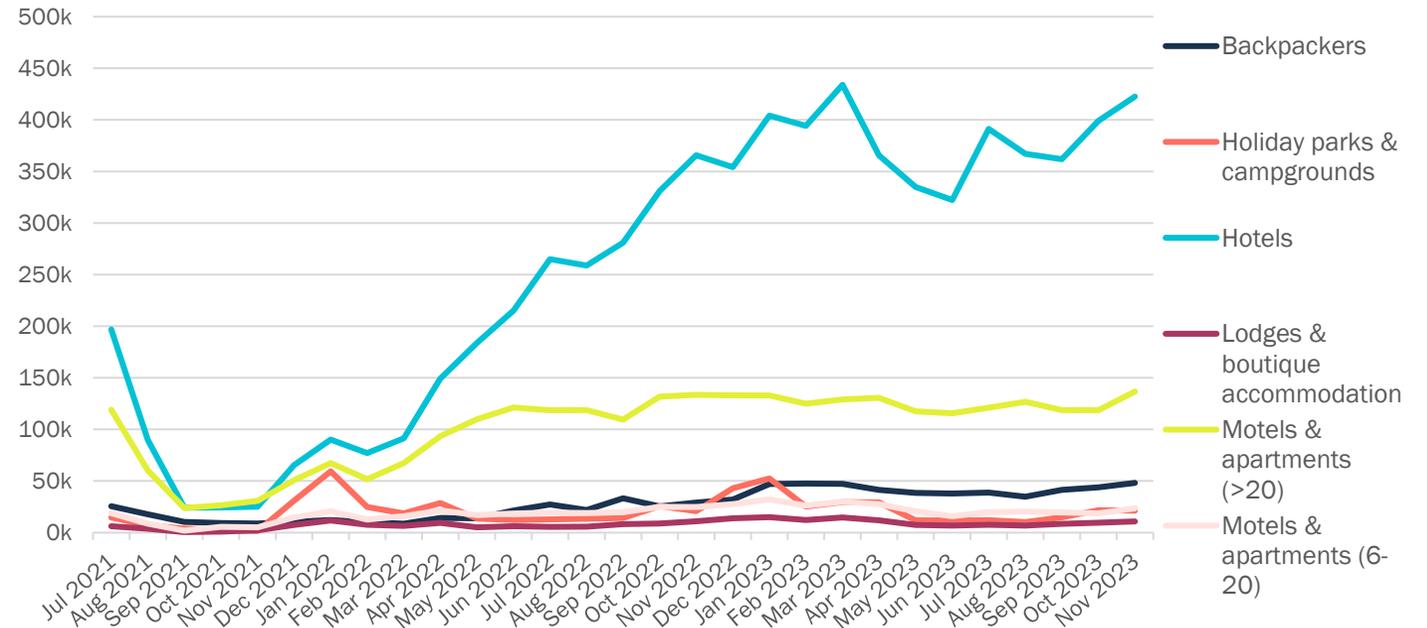
November 2023	Auckland	% change	New Zealand	% change
Total guest nights	662,900	13.7%	3,366,000	9.1%
Domestic guest nights	397,000	-3.1%	2,060,000	-4.2%
International guest nights	265,900	53.2%	1,306,100	39.8%

422.6k guest nights in hotels in November 2023, up 15.6%

- For the month of November 2023, there were 422.6k guest nights in hotels in Auckland, up 15.6% compared to November last year.
- Guest nights in backpacker accommodation (up 65.3% to 48.1k) increased in November 2023.
- Guest nights in holiday parks and campgrounds (21.3k) were also up (2.9%) for the month of November.
- There were 136.7k guest nights in motels and apartments (>20) (up 2.4%), and 23.5k guest nights in motels and apartments (6-20) (down 4.9%) in November 2023.
- Guest nights in lodges and boutique accommodation slightly decreased (down 0.9% to 10.8k).

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Guest nights by accommodation type (monthly)

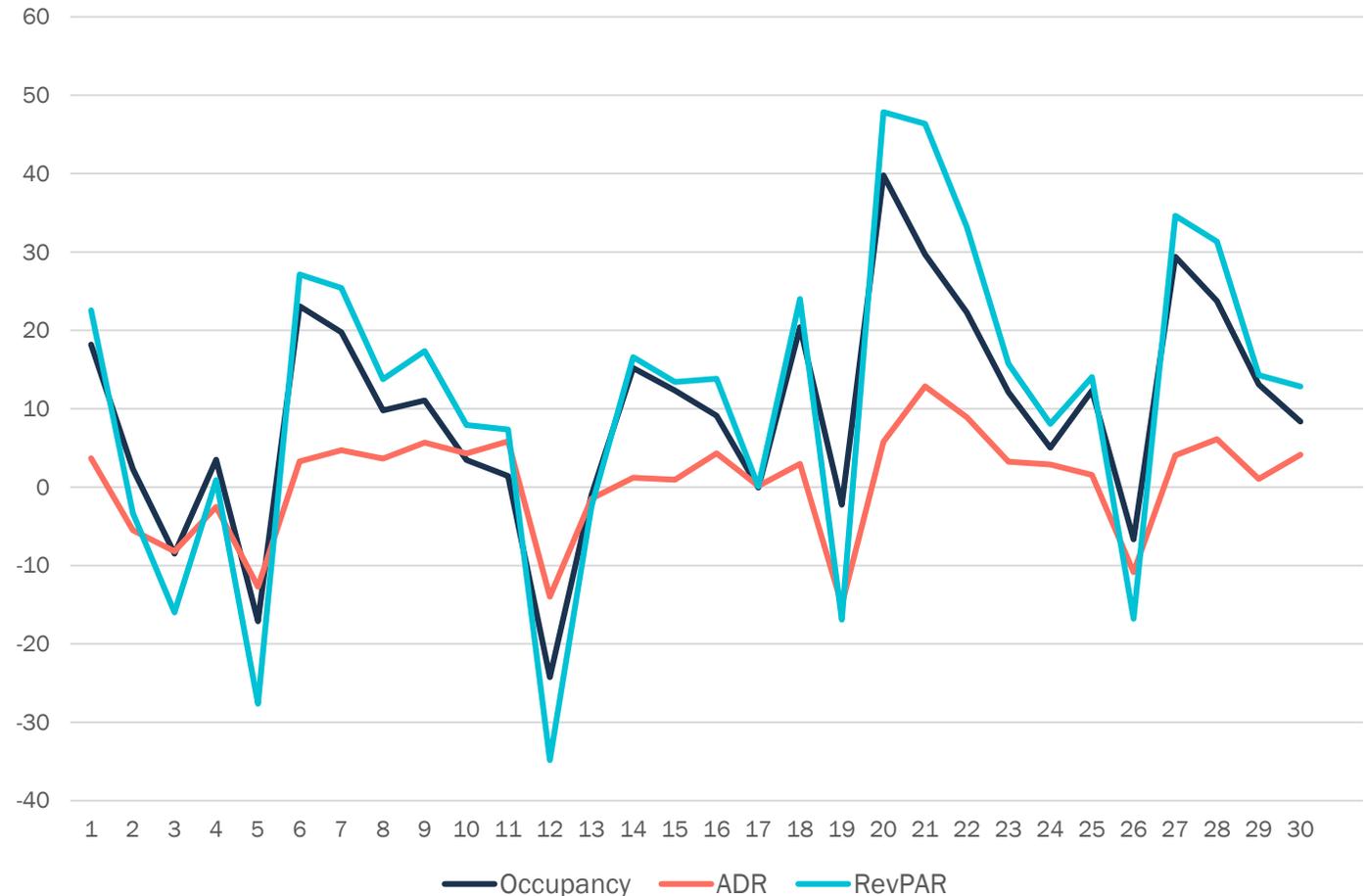


November 2023	Guest nights	% change
Hotels	422,600	15.6%
Motels & apartments (>20)	136,700	2.4%
Motels & apartments (6-20)	23,500	-4.9%
Backpackers	48,100	65.3%
Holiday parks & campgrounds	21,300	2.9%
Lodges & boutique accommodation	10,800	-0.9%

Occupancy was 8.8% higher in November 2023, compared to 2022

- **Occupancy was 8.8% higher** during the month of November 2023, compared to November 2022.
- **Revenue per available room (RevPAR) was 9.3% higher** in November 2023 compared to last year.
- **Average Daily Rate (ADR) was up (0.4%)** on last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in November 2023. Occupancy and RevPAR peaked on Monday 20th November while ADR peaked on Tuesday 21st November 2023.

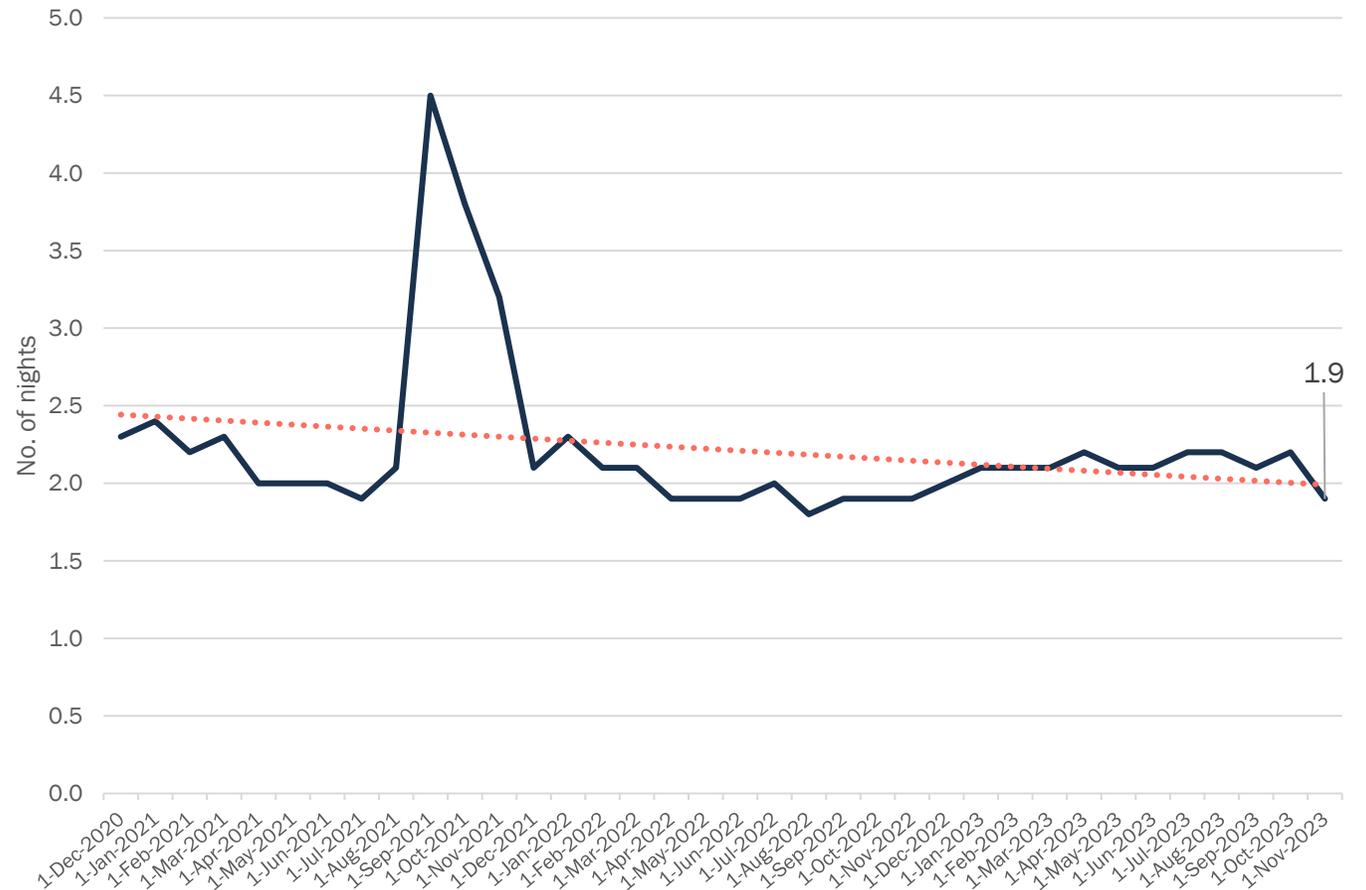
Percent Changes for the Month of November



On average, visitors stayed 1.9 nights in Auckland for the month of November 2023

- On average, visitors stayed in Auckland for 1.9 nights for the month of November 2023 (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.

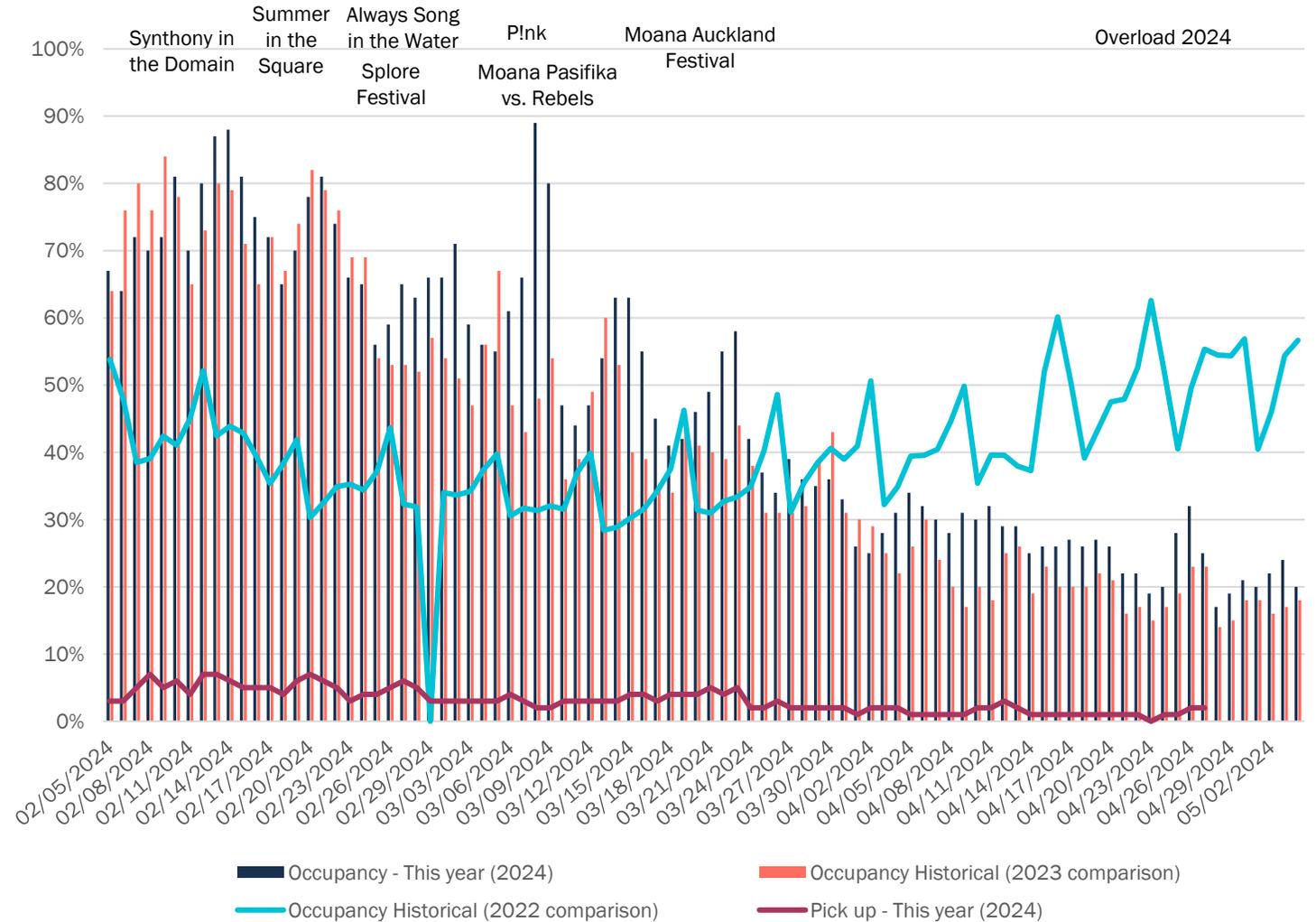
Average length of stay for visitors to Auckland



90 Day Forward Booking Occupancy Data

- Looking forward (over the next 12 months), overall occupancy on the books is higher for the period from February 2024 to January 2025 in comparison to last year.
- Occupancy is set to reach 88% on Wednesday 14th February 2024 (Valentine's Day) and 87% on Tuesday 13th February 2024.
- Occupancy on the books is also set to hit 89% on Friday 8th March 2024, when P!NK will be performing at Eden Park.

Occupancy - 90 Day Forward Outlook



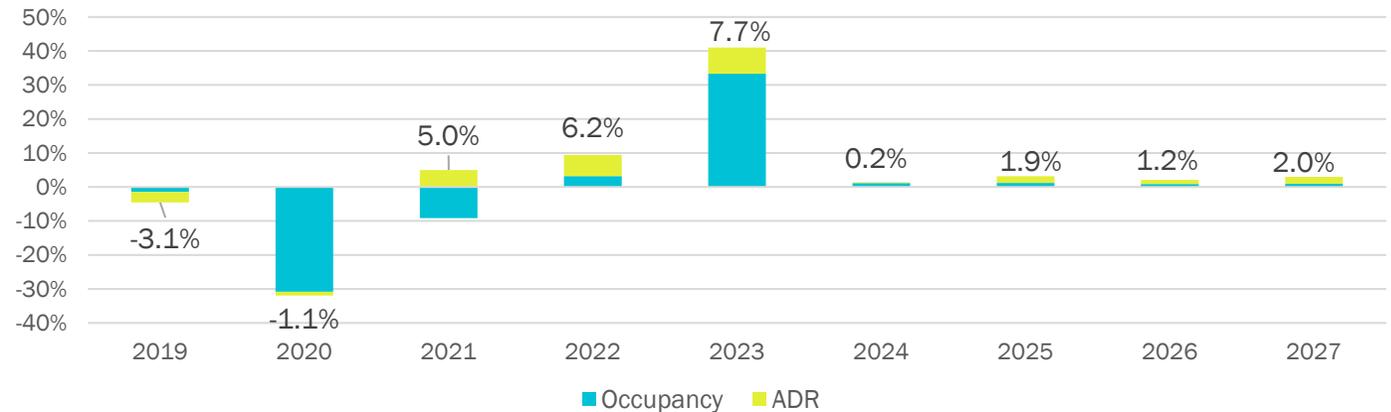
Longer term projections

- In addition to the STR Global 90 Day Forward Booking data we receive, we also now 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



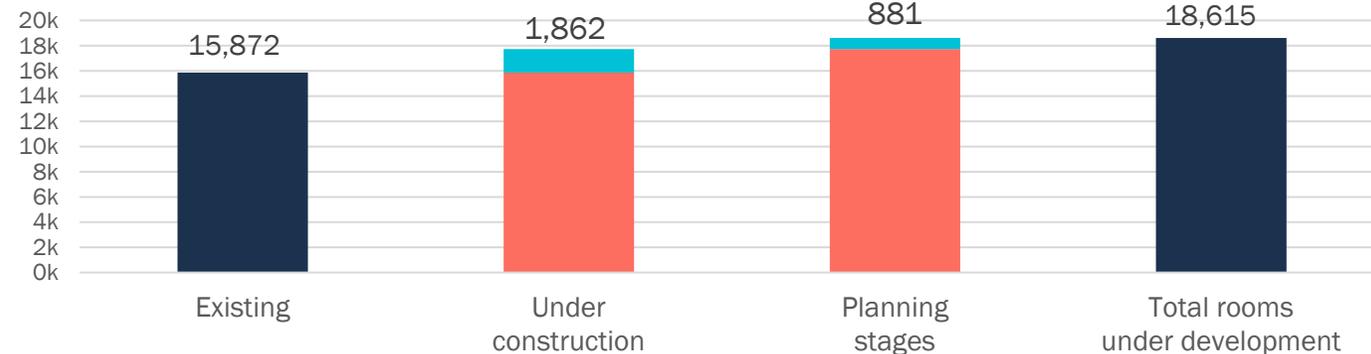
15.8k rooms available in 2023 and 18.6k rooms under development

- In 2023, on average there are 15.8k daily rooms available in Auckland. The number of average daily rooms available is set to increase by 3.2%, supplying an additional 494 rooms (compared to 2022) .
- Looking to 2024, average room supply is expected to expand 7.4%, supplying 1,164 new rooms and bringing the total number of rooms to 17.0k.
- Observing rooms by phase data, there are 226 properties in the pipeline with a total of 18,615 rooms under development.
- 210 properties (with a total of 15,872 rooms) are under existing development. 11 properties (with 1,862 rooms) are currently under construction, and five properties (with 881 rooms) are in the planning stages.

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, 3.64m visitors are projected to visit New Zealand in YE November 2027

- International overnight visitor arrival projections until 2027 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 2022 to 2027 (for Q3 2023), resulting in a possible 3.64m international visitors by YE November 2027.
- 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 November 2027 (bringing visitation close to pre-Covid levels of 1.54m in 2019).

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.



Auckland – Major Events Data

Major Events Insights



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Event	Date	Venue	Interesting Findings
Diwali Festival	30 October – 5 November 2023	Aotea Centre	
WXV1 tournament – Women's Rugby	3-4 November 2023	Mount Smart Stadium	
The Beer Festival	4 November 2023	Queens Wharf	
Kevin Bridges	10-11 November 2023	Aotea Centre	<ul style="list-style-type: none"> ▪ The month of November saw 214.0k international visitors, up 31.8% on November 2022.
Rotationals	12 November 2023	Mount Smart Stadium	<ul style="list-style-type: none"> ▪ For the month of November 2023, there were 662.9k total guest nights in commercial accommodation in Auckland, up 13.7% on the same month last year.
Red Bull Cliff Diving	14-19 November 2023	Viaduct Events Centre	
Bill Bailey - Thoughtifier	22-25 November 2023	Aotea Centre	
Macca's Festival of Football - Wellington Phoenix Double Header	25 November 2023	Mount Smart Stadium	
2023 Farmers Santa Parade	26 November - 26 December 2023	Aotea Square	
Hansel & Gretel	30 November – 3 December 2023	Aotea Centre	



Auckland – Business Events Data

Business Events Insights Q3 Sep 2023



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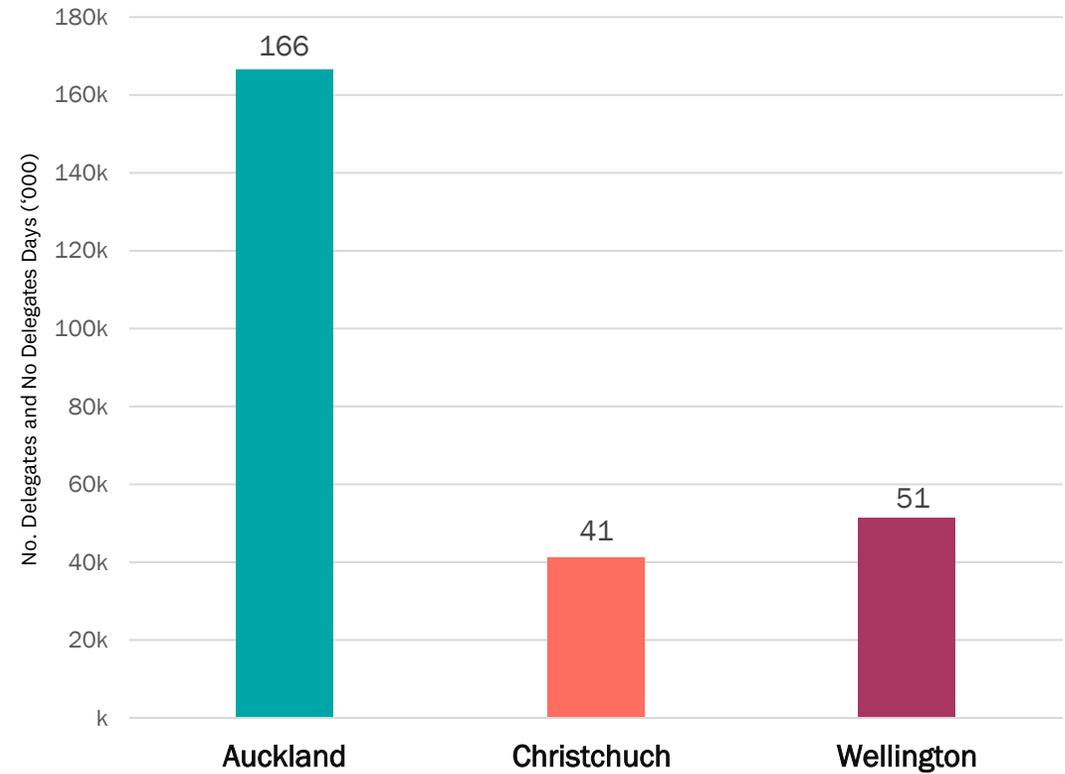


Auckland attracted the highest number of business events and delegates in New Zealand in Q3 2023

Total number of business events – Regional comparison



Total number of delegates – Regional comparison

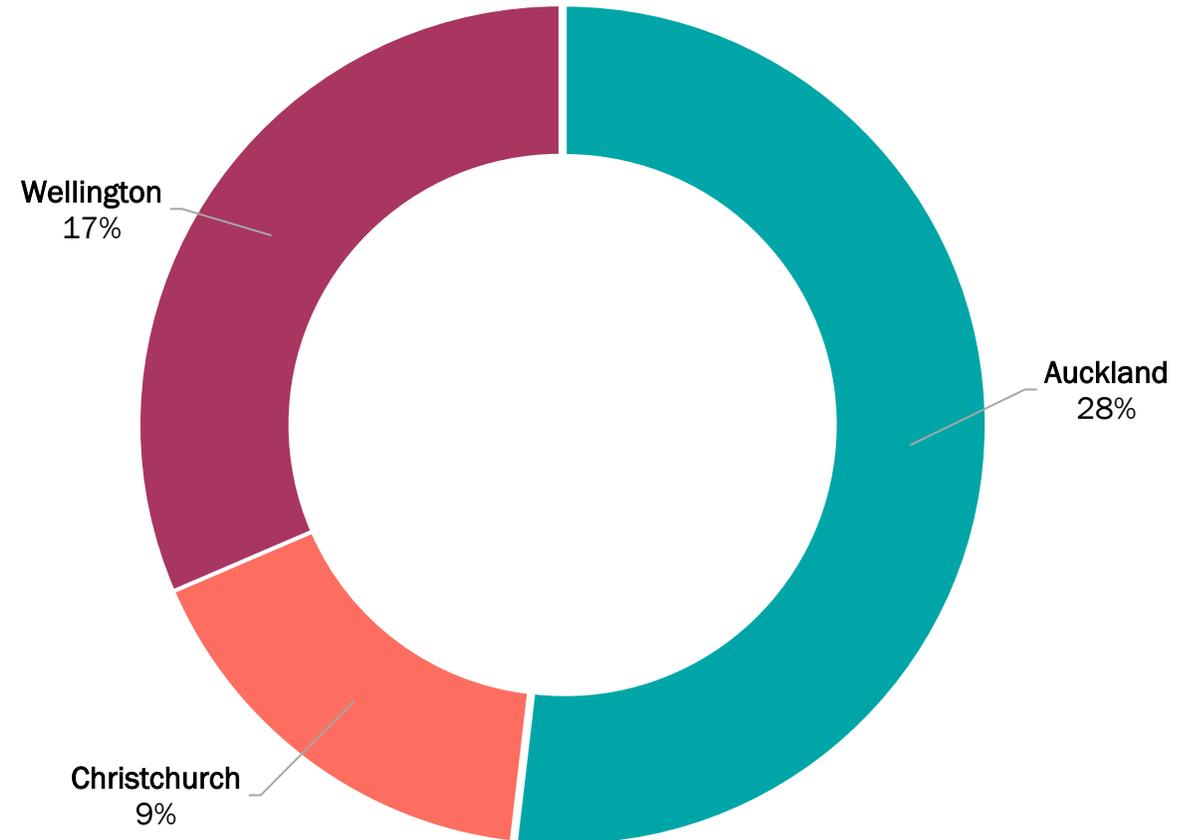


Auckland has the largest market share of business events in NZ (28%) - Q3 2023



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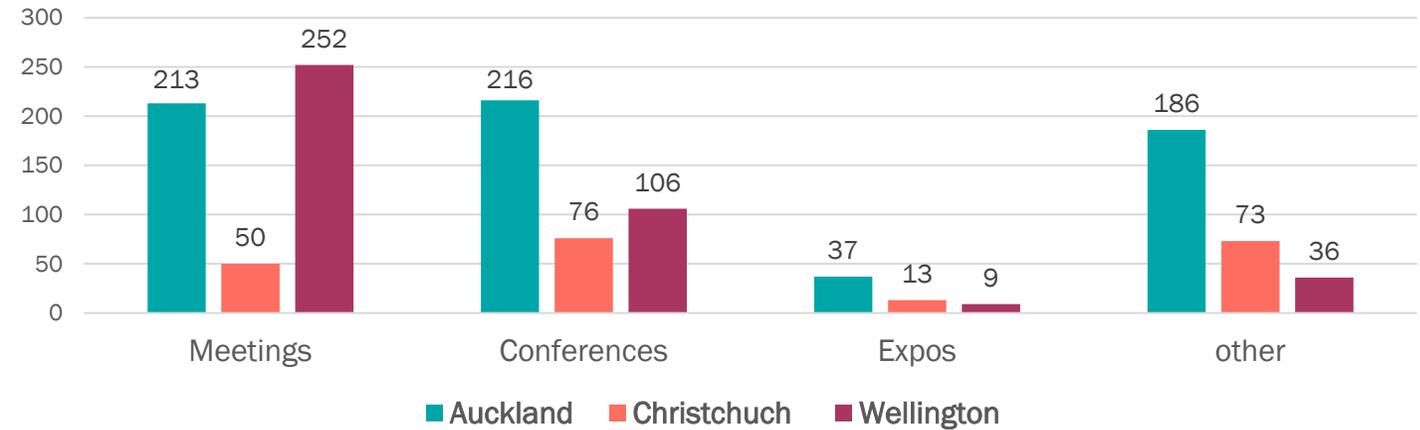
Business Event Market Share - Regional Comparison



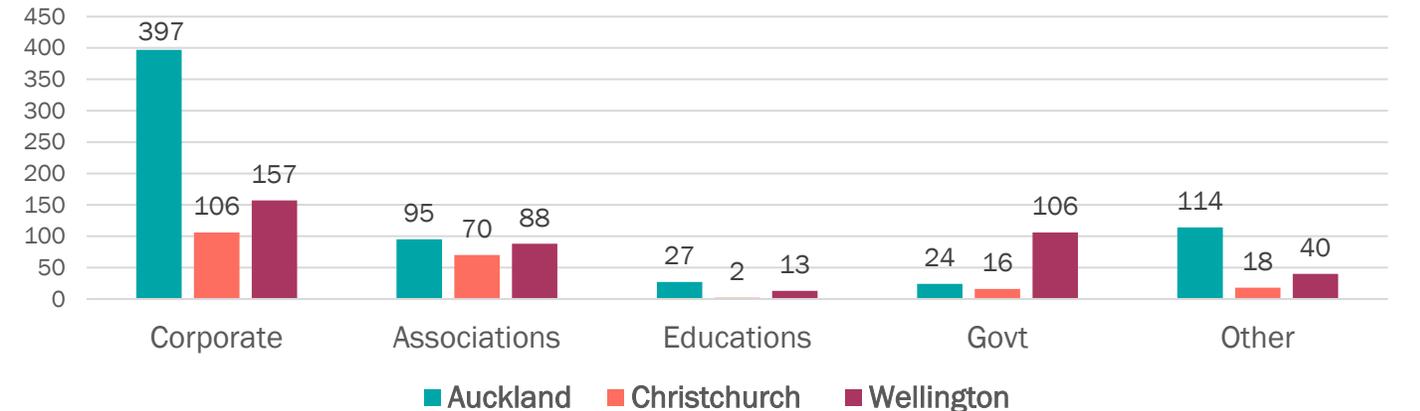
Auckland hosted the most conferences, other business events and expos in NZ – Q3 2023

- Of the three featured regions, **Auckland hosted the most conferences (216), other business events like social functions and Gala dinners (186) and expos (37) in New Zealand in Q3 2023.**
- However, Wellington held the highest number of meetings (252), followed closely by Auckland (213) and then Christchurch (50).
- The majority of business events in Auckland were for **Corporate customers (397), Other customers (114) and Associations (95).**
- Between the three regions, Wellington recorded the most Government-related business events (106). 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

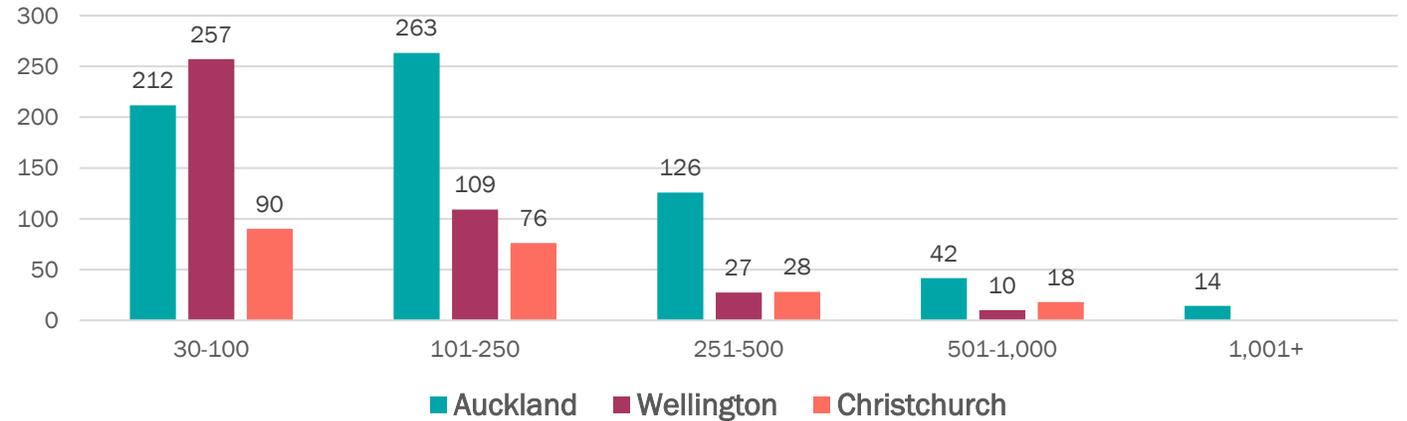


25% of all business events in Auckland were multi-day events

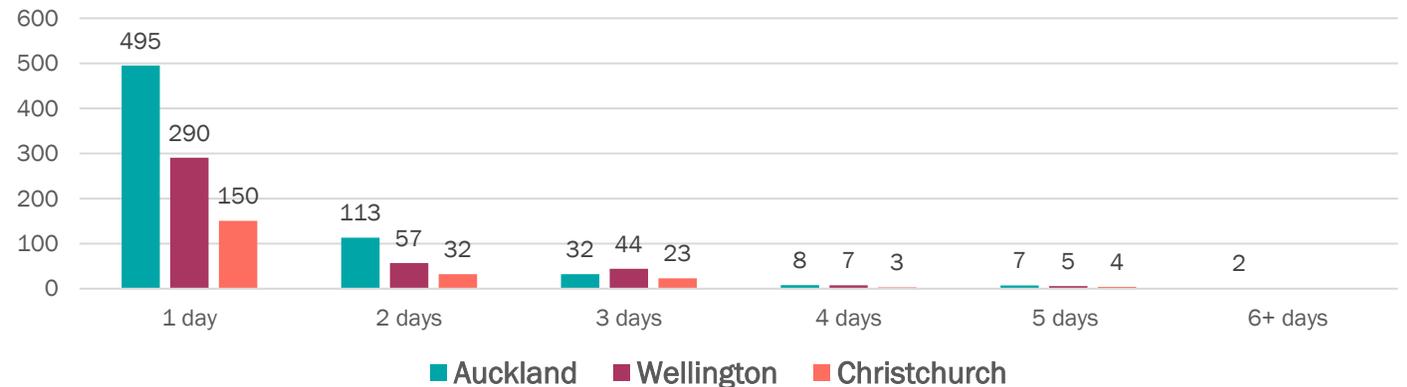
- In Q3 2023, a third of all business events held in Auckland were smaller events hosting between 30-100 delegates (212 events). In comparison to other regions, Wellington hosts most small business events (257 events).
- 40% of business events in Auckland were medium-sized events with 263 events hosting between 101-250 delegates.
- 19% of business events (126) in Auckland hosted between 251-500 delegates.
- Of all three regions, Auckland was the only region that hosted over 1,000 delegates in Q3 2023 (14 events).
- In Q3 2023, three quarters of all business events (75%) in Auckland were one day events (495), while 25% were multi-day events. 17% were held for a duration of two days (113), and 5% ran over the course of three days (32).

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No. of delegates - Regional comparison



Duration of event - Regional comparison





Auckland Visitor Survey

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

Visitor Experience



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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%

YE June 2022

-3

Compared to
YE June 2021

DETRACTORS

29%

YE June 2022

+3

Compared to
YE June 2021

TOTAL NPS

1

YE June 2022

-6

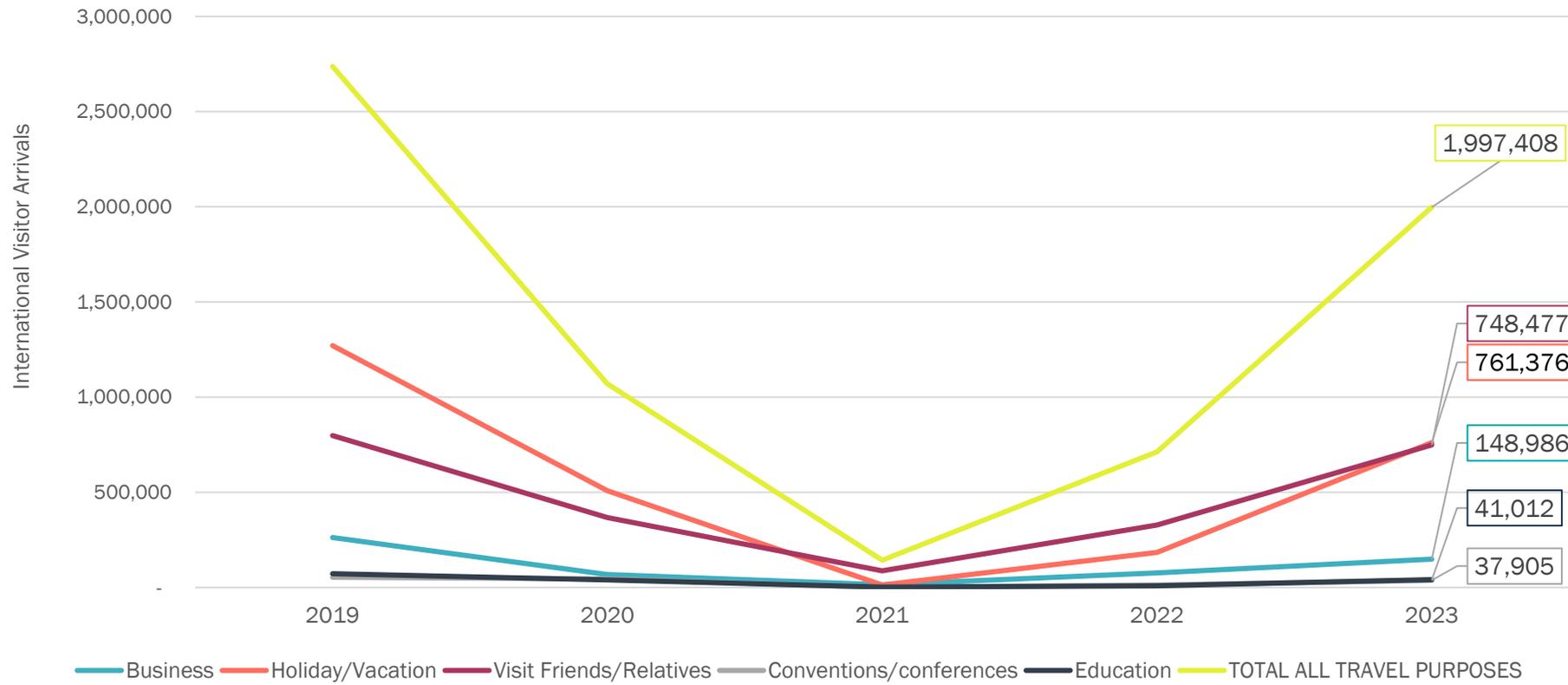
Compared to
YE June 2021

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.



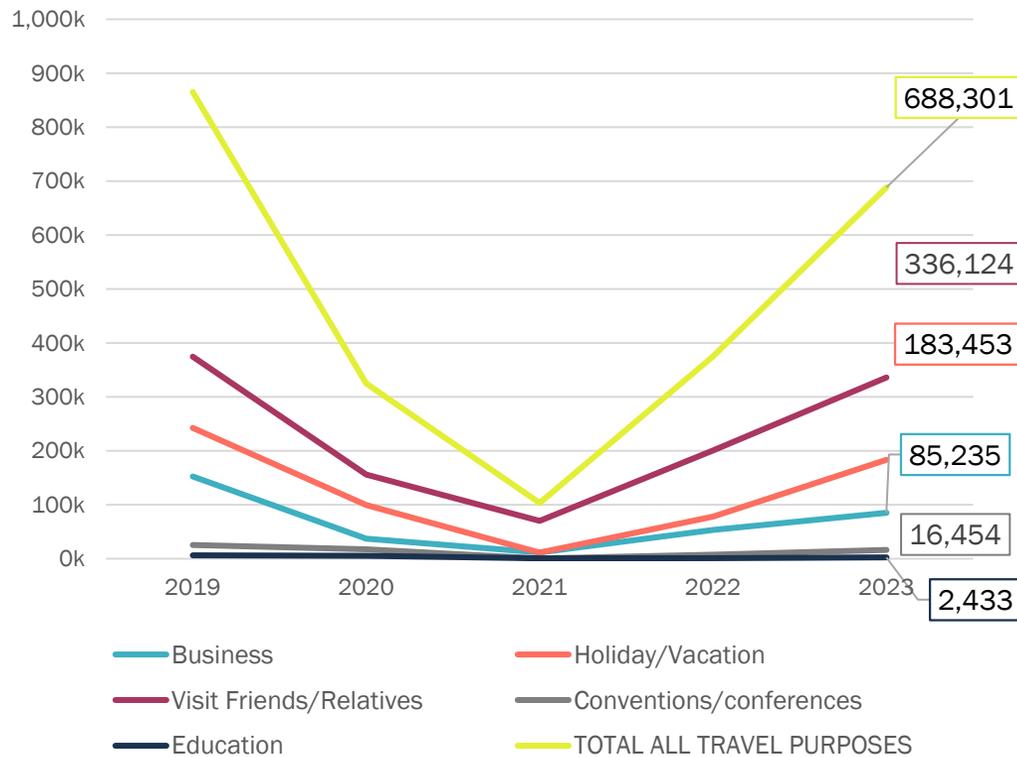
Five-year trends in key markets

Five-year visitor arrivals to Auckland, YE November

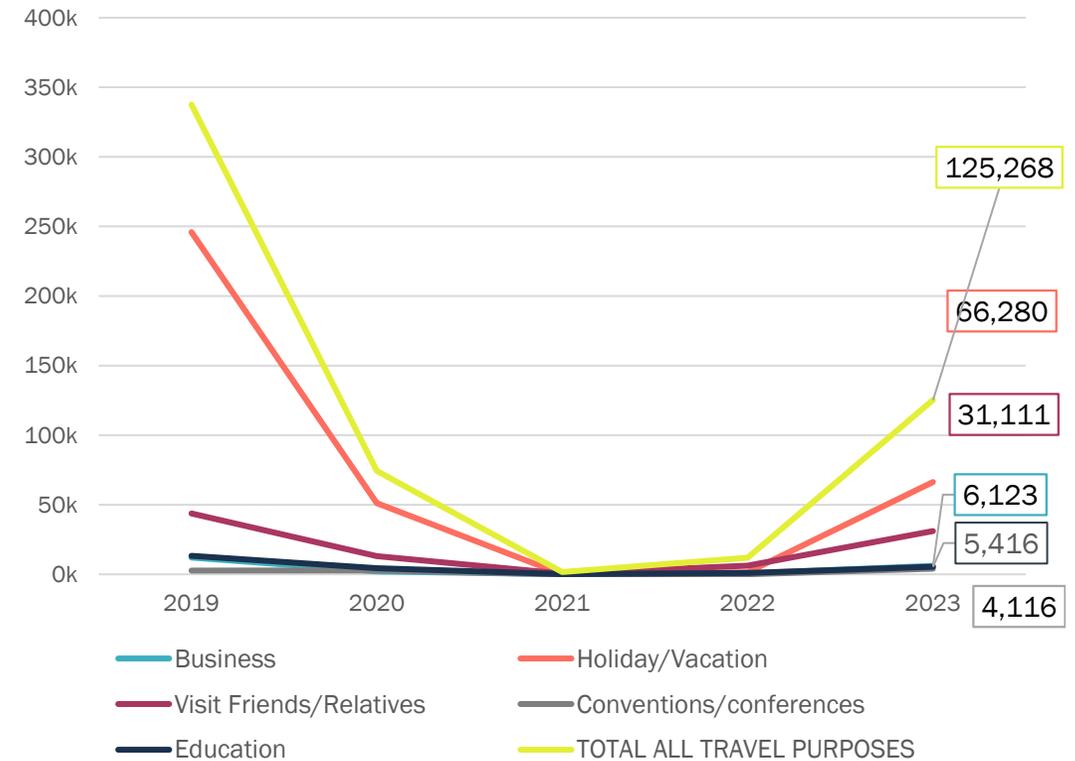


Five-year visitor arrivals to Auckland, YE November

Australia

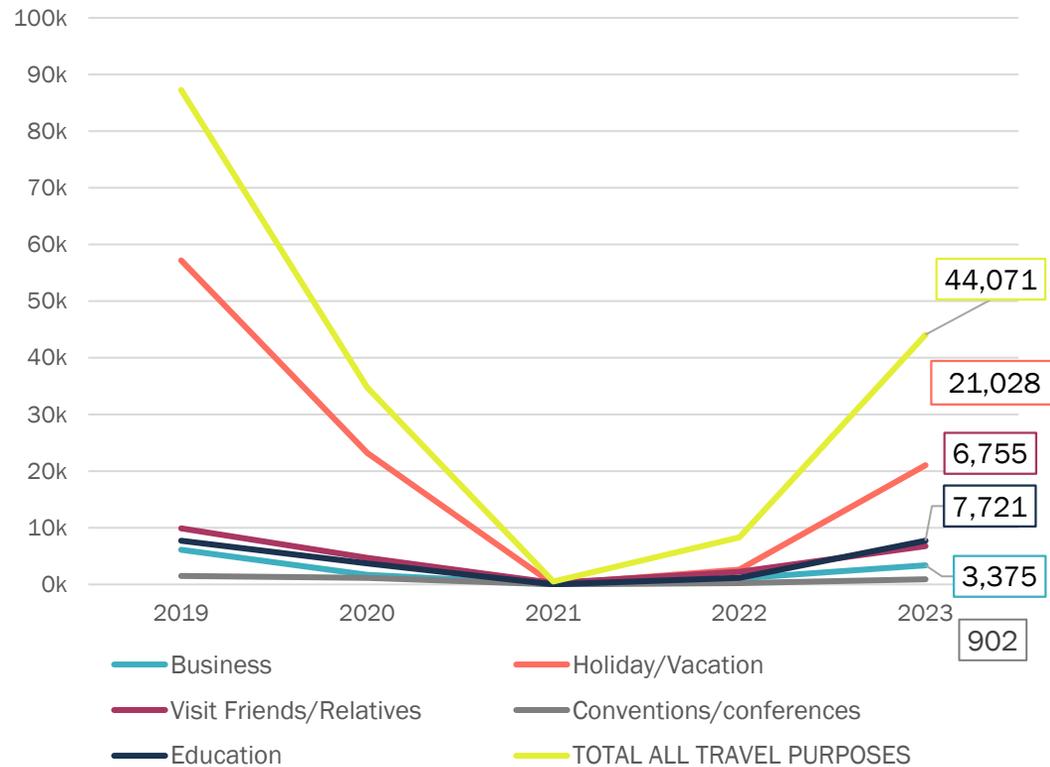


China

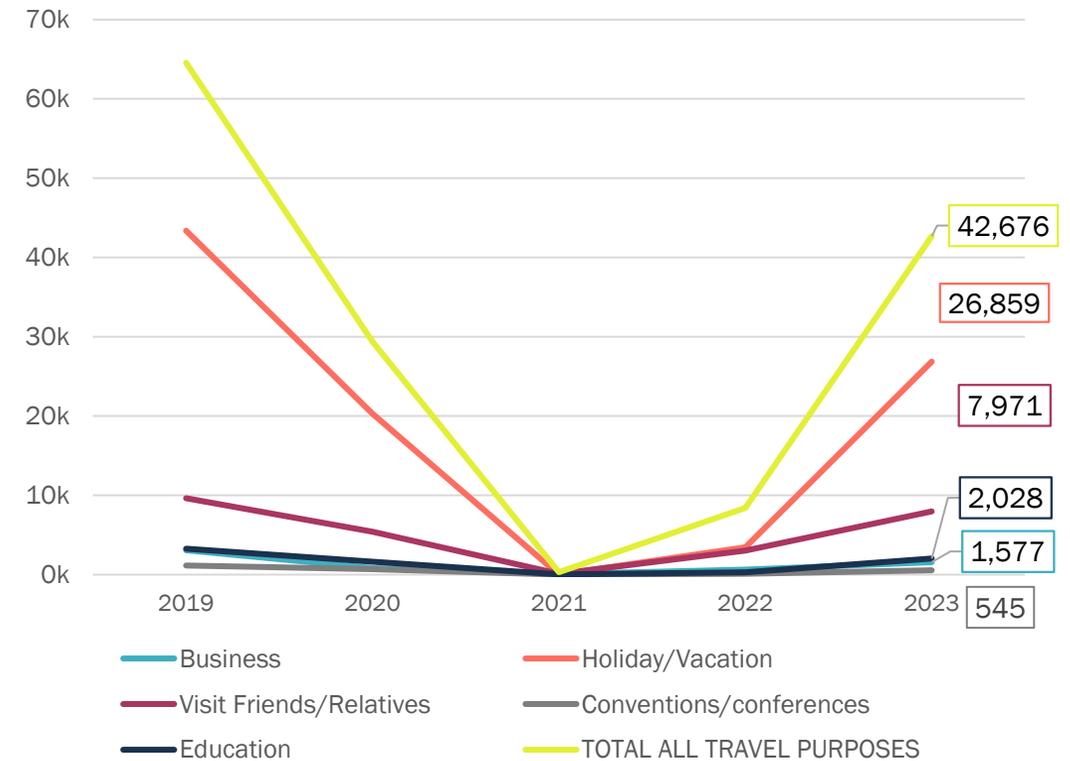


Five-year visitor arrivals to Auckland, YE November

Japan

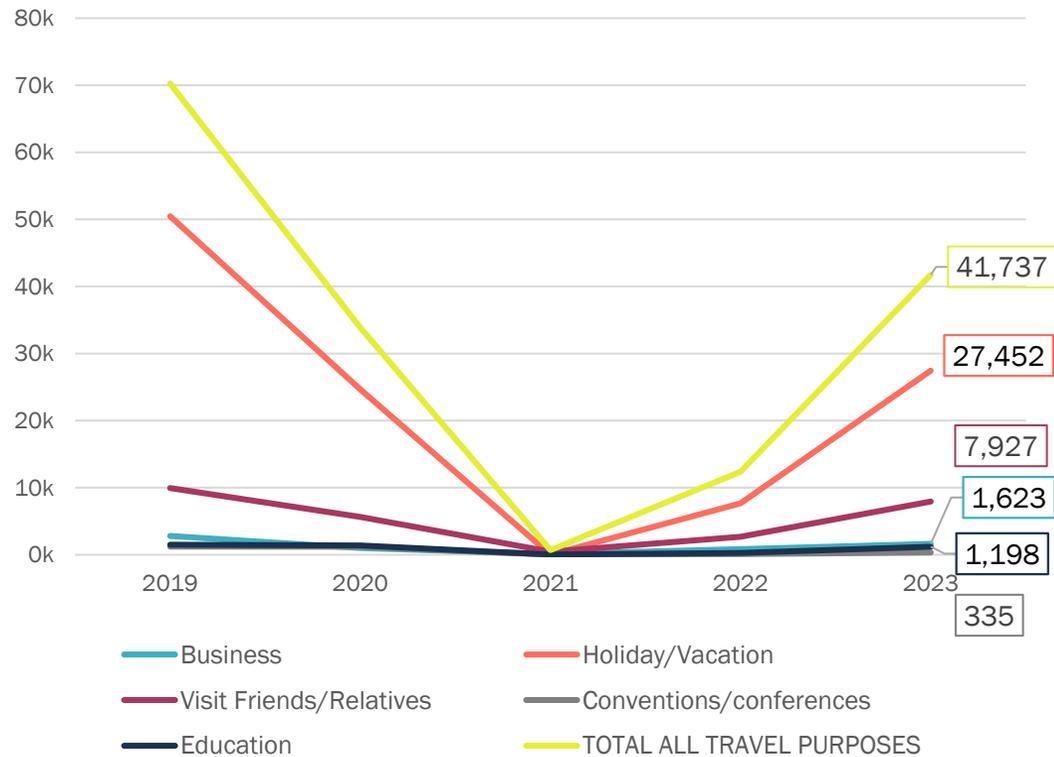


Korea

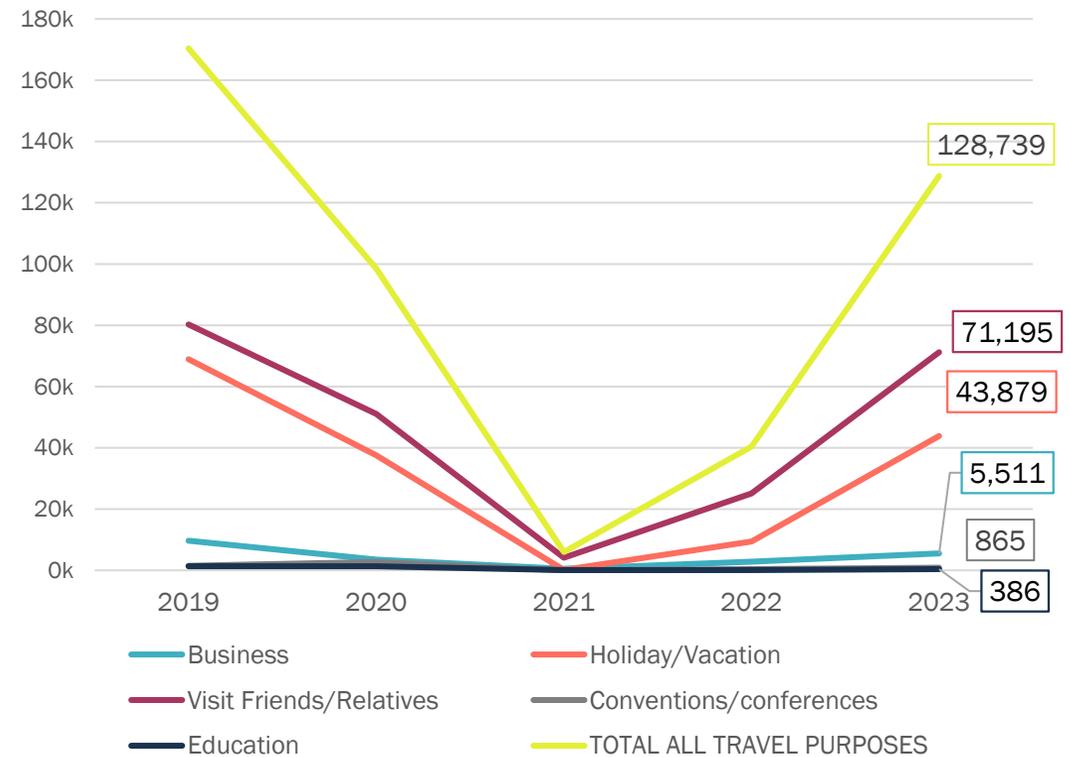


Five-year visitor arrivals to Auckland, YE November

Germany

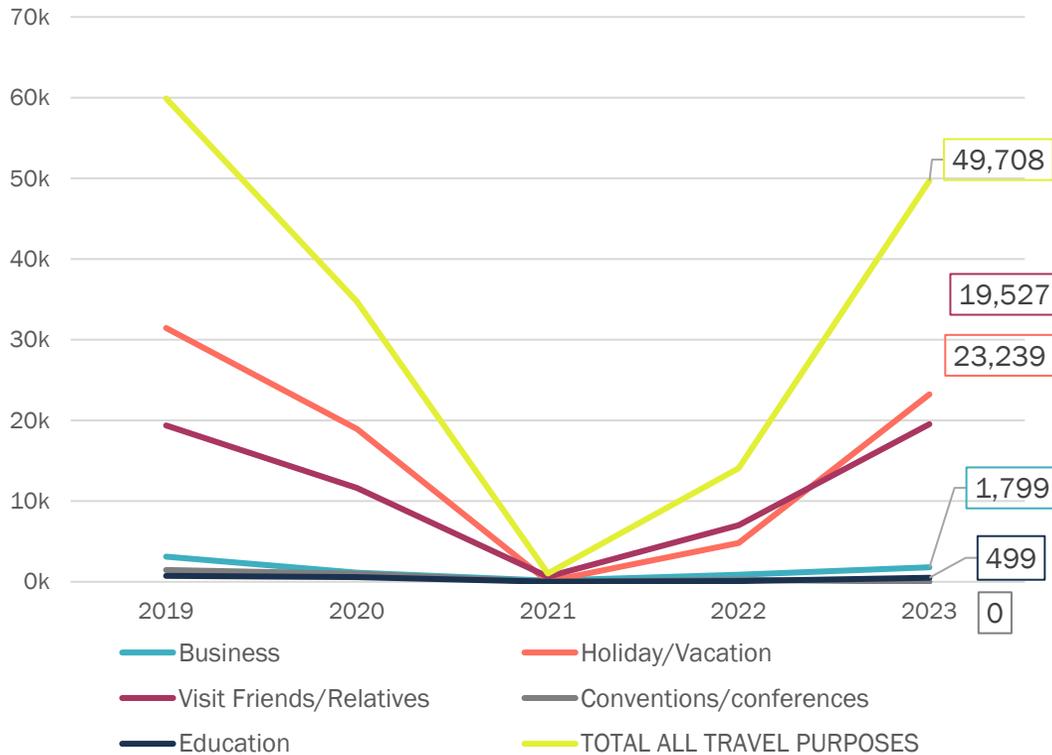


UK

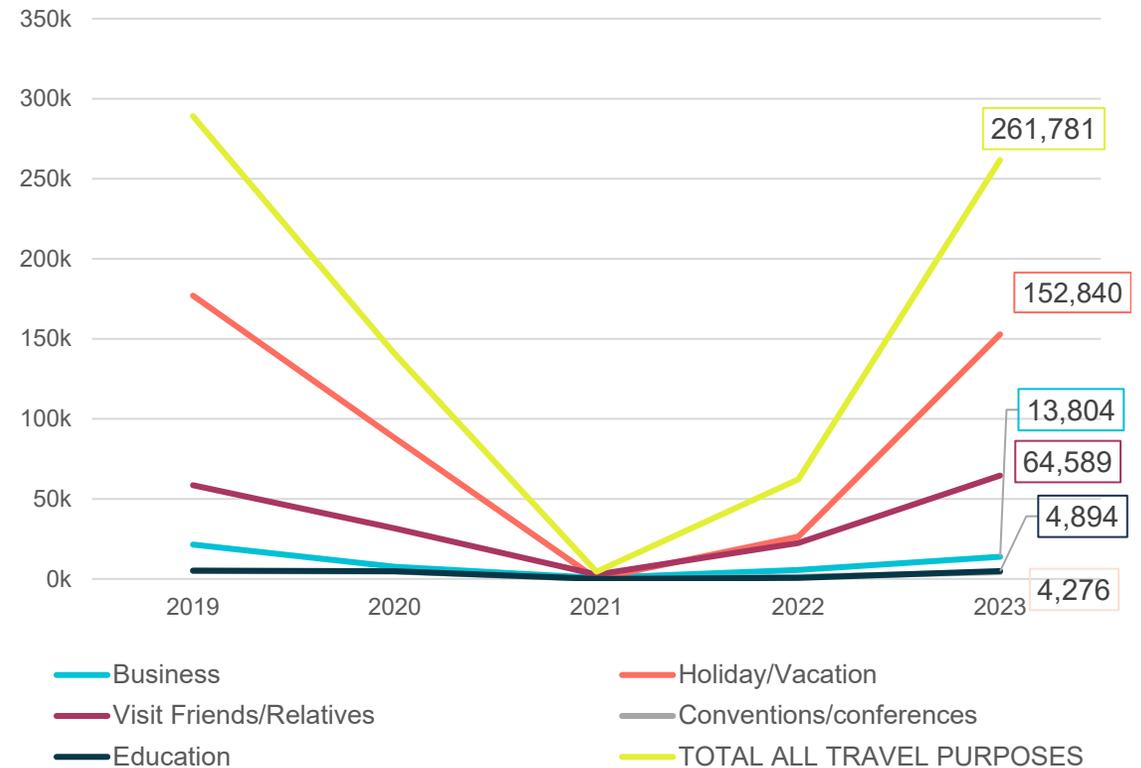


Five-year visitor arrivals to Auckland, YE November

Canada



US



Ngā mihi Thank you

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