

Tātaki  
Auckland  
Unlimited



# Tāmaki Makaurau Auckland Destination Overview

December 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 February 2024

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# Key Visitor Data



## INTERNATIONAL

- **Monthly international visitors (298.5k)** were up **15.6%** on December 2022 (258.3k) but numbers were down 20.4% compared to December 2019 pre-Covid (375.1k).
- **The year to December 2023** saw **2.04m international visitor arrivals, an increase of 111.0%** on 2022. However, international visitation was down 25.3% compared to pre-Covid levels (2.73m in YE December 2019).
- There was a slight decrease in visitors from the **Australian market** in **December 2023**, with **94.4k visitors, down 3.7%** compared to last year. **The year to December 2023** saw **684.6k Australian visitors, up 45.1%**.
- **Holiday visitors (799.2k)** contributed the most to annual visitor numbers and **increased 201.1%** on the year to December 2022. **Monthly numbers (118.8k)** were up **46.7%** compared with December 2022.
- **VFR visitors (739.6k)** were up **57.3% for the year**, with **monthly numbers (135.8k) down 6.1%**.
- **298.4k international guest nights in commercial accommodation** for December, up **49.5%** 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 **377.4k domestic guest nights in commercial accommodation** for the month of **December, down 7.0%**.
- As of the 8<sup>th</sup> 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 from the month of November 2023 onwards, is not currently available.

## OVERALL

- For the month of December 2023, there were **675.8k total guest nights in commercial accommodation** in Auckland, up **11.6%** on last year.
- **On average, visitors stayed in Auckland for 2.0 nights** for the month of December 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 hit 96% on the 13<sup>th</sup> and 14<sup>th</sup> of February 2024 (Valentine's Day).
- Occupancy on the books is also set to reach 89% on Friday 8<sup>th</sup> March 2024, when PINK 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%.

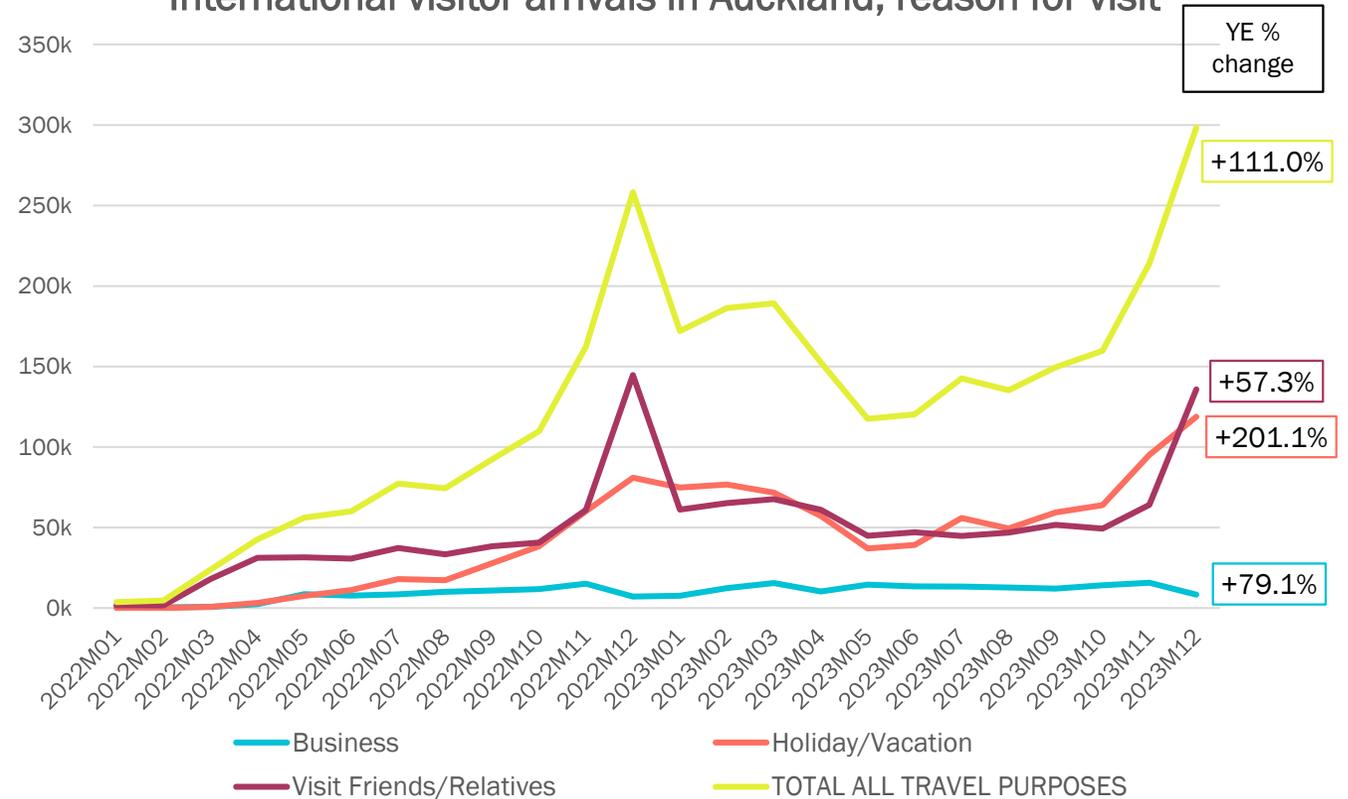


# Auckland Tourism – Visitor Arrivals Data

# 2.04m International visitor arrivals in the year to December 2023, up 111.0%

- The month of December saw 298.5k international visitors, up 15.6% on December 2022 (258.3k) but down 20.4% compared to pre-Covid numbers (375.1k in December 2019).
- The year to December 2023 saw 2.04m international visitor arrivals, an increase of 111.0% on the previous year. However, international visitation was down 25.3% compared to pre-Covid levels (2.73m in YE December 2019).
- Holiday visitors (799.2k) contributed the most to annual visitor numbers and increased 201.1% on the year to December 2022. Monthly holiday numbers (118.8k) were also up 46.7% compared with the month of December 2022.
- VFR visitors (739.6k) were up 57.3% for the year, with monthly numbers (135.8k) down 6.1%.
- There were 150.1k business visitors (up 79.1%) in the year to December 2023, and 8.3k for the month (up 15.3%).

International visitor arrivals in Auckland, reason for visit

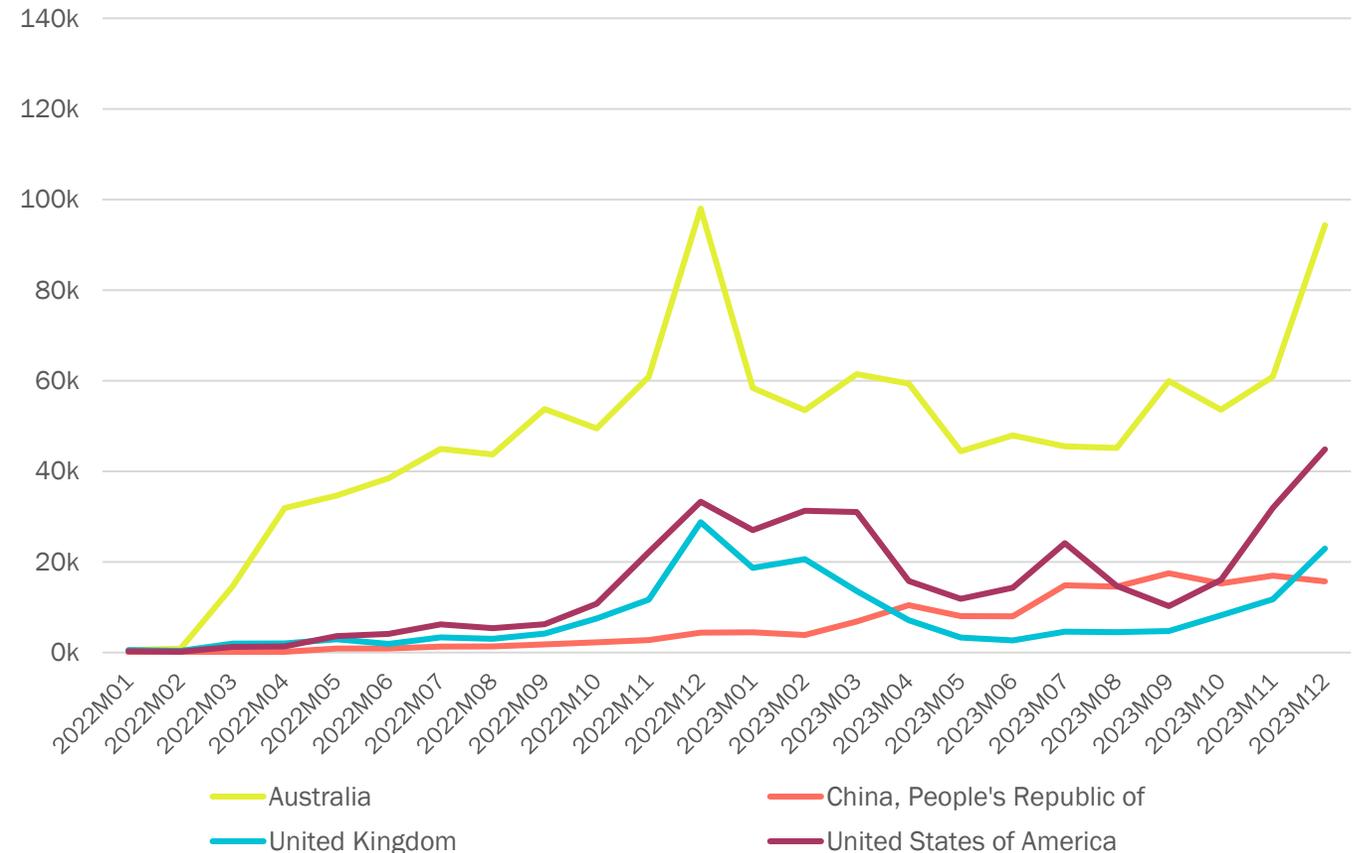


	Visitor arrivals	vs. previous year / YE	vs. pre-Covid / 2019
December 2023	298,463	15.6%	-20.4%
YE December 2023	2,037,601	111.0%	-25.3%

# 684.6k visitors from Australia for YE December 2023, up 45.1%

- There was a slight decrease in **Australian visitors** in the month of December 2023, with **94.4k visitors**, down **3.7%** compared to last December. **The year to December 2023 saw 684.6k Australian visitor arrivals, up 45.1%.**
- **The year to December 2023 saw 273.3k visitors from the US (up 187.5%), with 44.9k visitors for the month (up 34.7%).**
- **Visitors from China (136.6k) were also up for the year (743.0%), and up (255.3%) for the month of December (to 15.7k).**
- **For the year to December 2023, there were 122.9k visitor arrivals from the UK (up 79.5%) and 23.0k visitors for the month (down 20.2%).**

Visitor arrivals in Auckland by key international markets

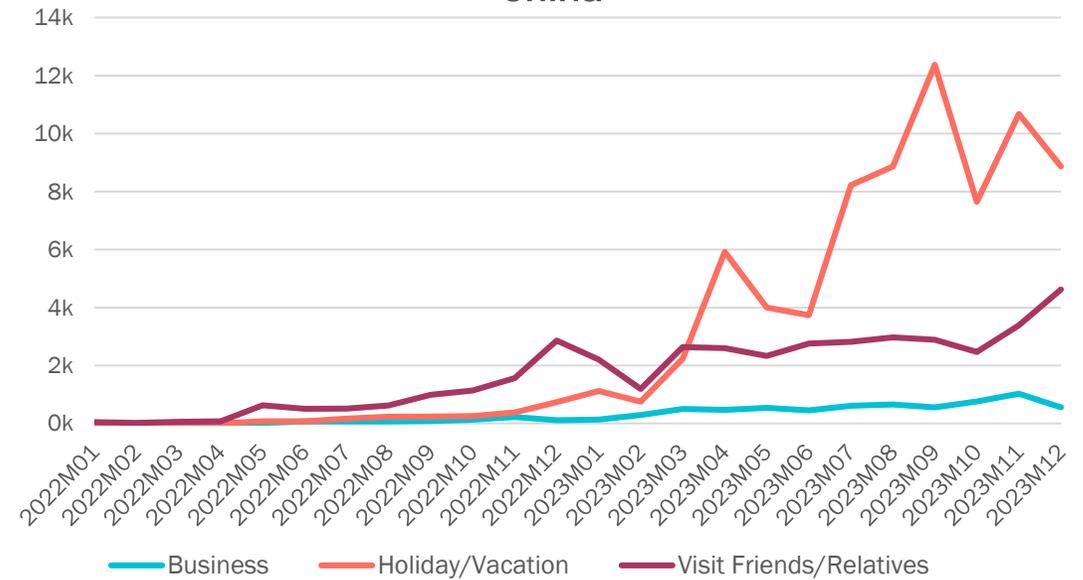


# 24-month visitor arrivals from individual markets

### Australia



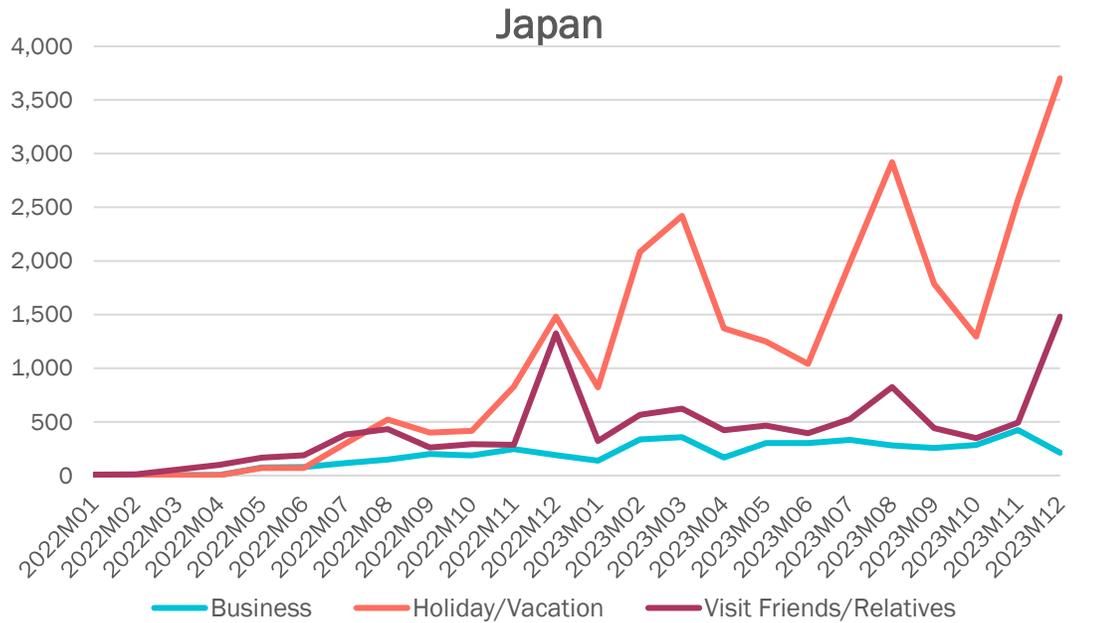
### China



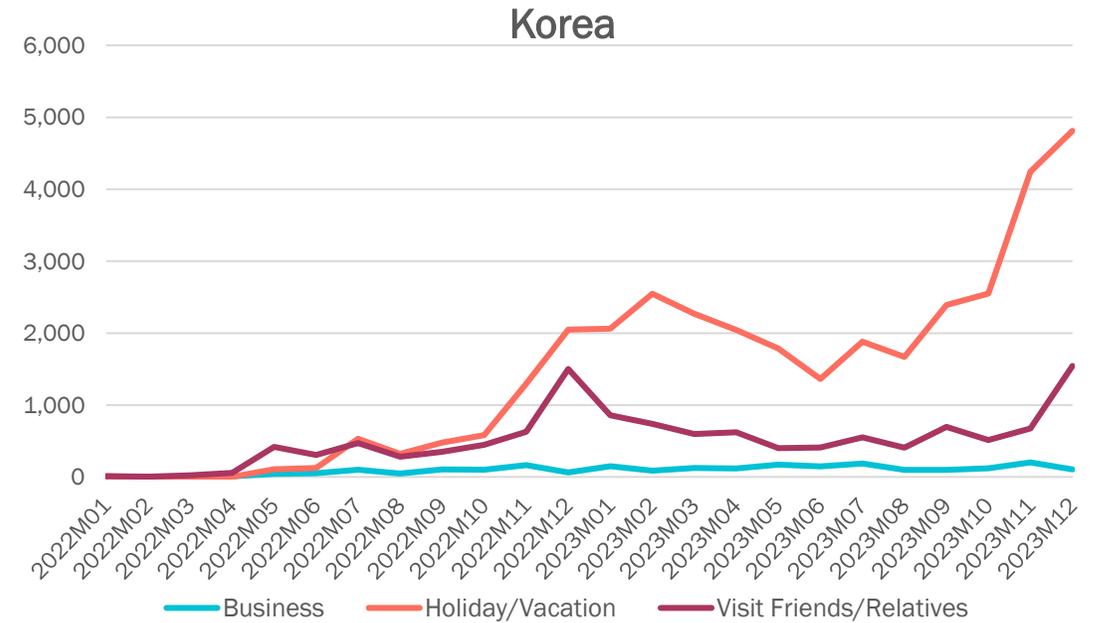
		vs. Business previous year	vs. Holiday previous year	vs. VFR previous year	vs. Total previous year			
December 2023	4,608	14.9%	24,350	-1.8%	56,010	-9.2%	94,362	-3.7%
YE December 2023	85,834	49.9%	182,996	77.7%	330,475	26.4%	684,626	45.1%

	vs. Business previous year	vs. Holiday previous year	vs. VFR previous year	vs. Total previous year				
December 2023	558	394%	8,866	1104.6%	4,625	61.5%	15,707	255.3%
YE December 2023	6,568	702.0%	74,410	3322.7%	32,872	264.0%	136,554	743.0%

# 24-month visitor arrivals from individual markets



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
December 2023	213	11.5%	3,702	150.0%	1,481	11.7%	6,027	77.1%
YE December 2023	3,397	170.0%	23,249	467.7%	6,910	96.7%	46,694	300.7%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
December 2023	105	61.5%	4,813	134.9%	1,543	2.7%	7,018	76.5%
YE December 2023	1,617	131.3%	29,623	438.0%	8,012	77.8%	45,717	269.7%

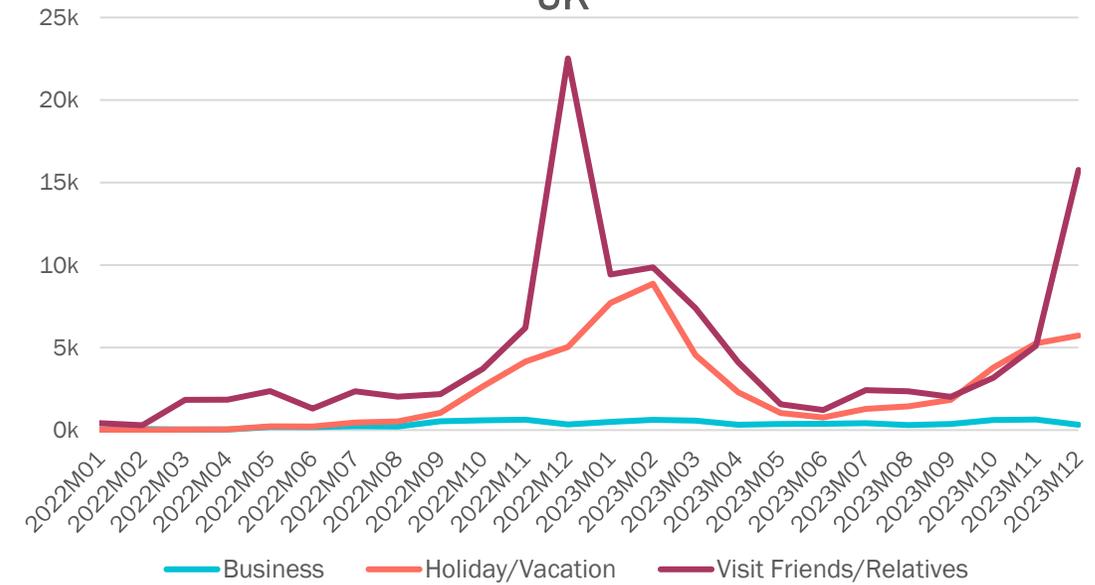
# 24-month visitor arrivals from individual markets

## Germany



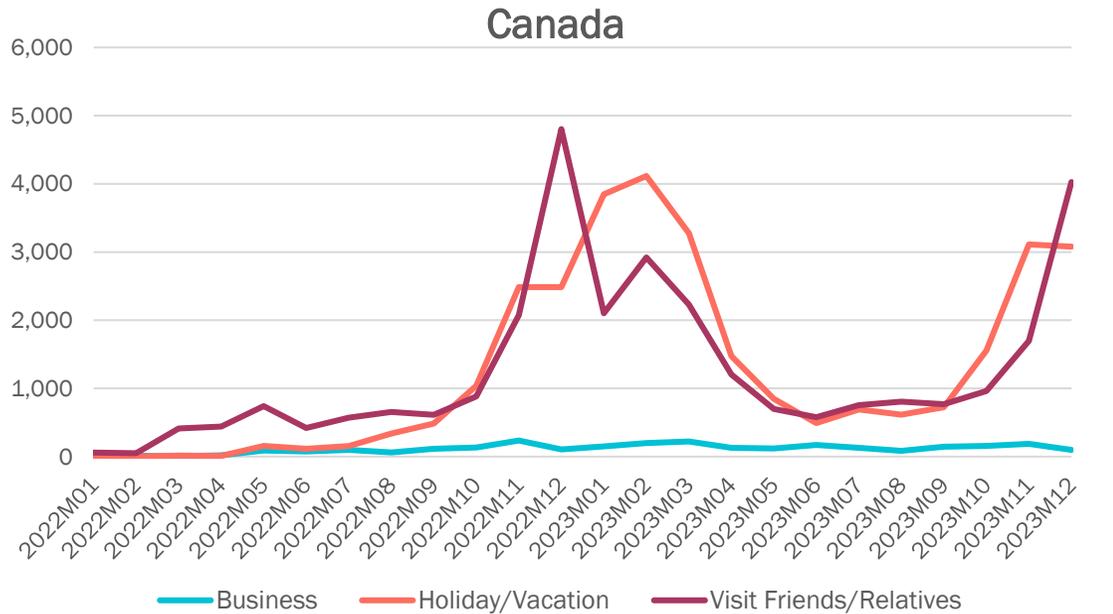
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
December 2023	73	2.8%	5,269	56.0%	2,019	-6.9%	7,854	30.7%
YE December 2023	1,625	82.6%	29,344	165.8%	7,777	63.3%	43,581	138.5%

## UK



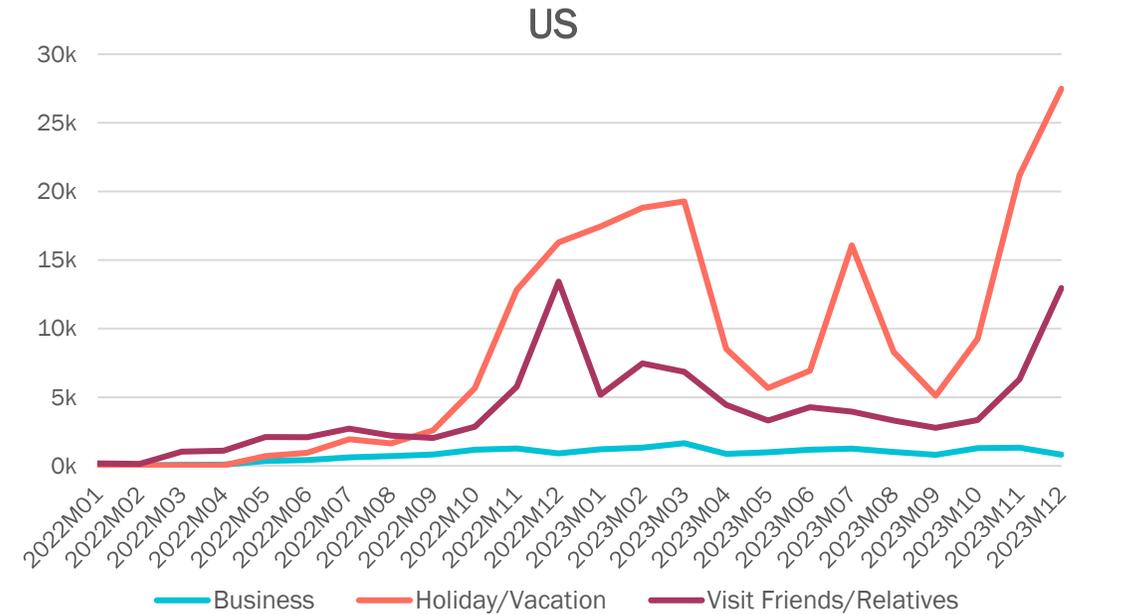
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
December 2023	324	-7.4%	5,731	13.8%	15,766	-30.0%	22,967	-20.2%
YE December 2023	5,485	75.2%	44,573	208.8%	64,438	36.8%	122,924	79.5%

# 24-month visitor arrivals from individual markets



		vs. Business previous year	vs. previous year	Holiday	VFR	vs. previous year	Total	vs. previous year
December 2023	98	-8.4%	23.8%	3,079	4,025	-16.2%	7,675	-2.9%
YE December 2023	1,790	84.2%	226.5%	23,831	18,748	59.9%	49,481	126.4%

[aucklandunlimited.com](http://aucklandunlimited.com)



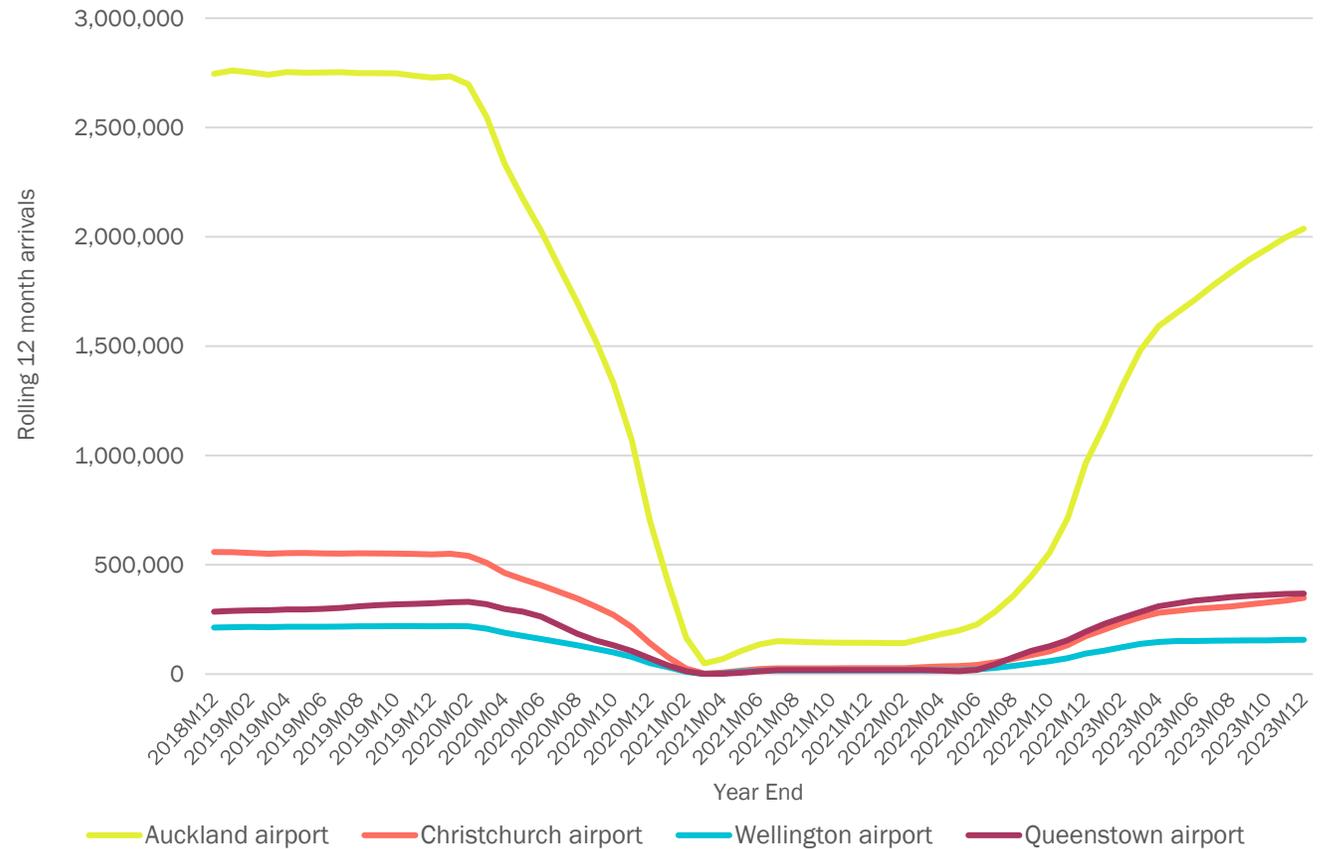
		vs. Business previous year	vs. previous year	Holiday	VFR	vs. previous year	Total	vs. previous year
December 2023	817	-10.2%	68.7%	27,482	12,956	-3.6%	44,858	34.7%
YE December 2023	13,711	110.4%	284.5%	164,033	64,112	80.0%	273,325	187.5%

# Auckland has seen a **111.0% 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 111.0% increase in international visitor arrivals over the last year.
- For the year ending December 2023, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 89.9%, Christchurch was up 100.9% and Wellington was up 68.0% compared to last year.

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12 month rolling visitor arrivals





# Auckland Tourism – Accommodation Data

# 675.8k total guest nights in commercial accommodation in December 2023, up 11.6%

- For the month of December 2023, there were **675.8k total guest nights** in commercial accommodation in Auckland, up **11.6%** on the same month last year.
- There were **377.4k domestic guest nights** in commercial accommodation (down 7.0%), and **298.4k international guest nights** (up 49.5%) in commercial accommodation in December 2023.
- For New Zealand overall, there were 4.07m guest nights in commercial accommodation in December 2023, up 6.5% compared to December 2022.

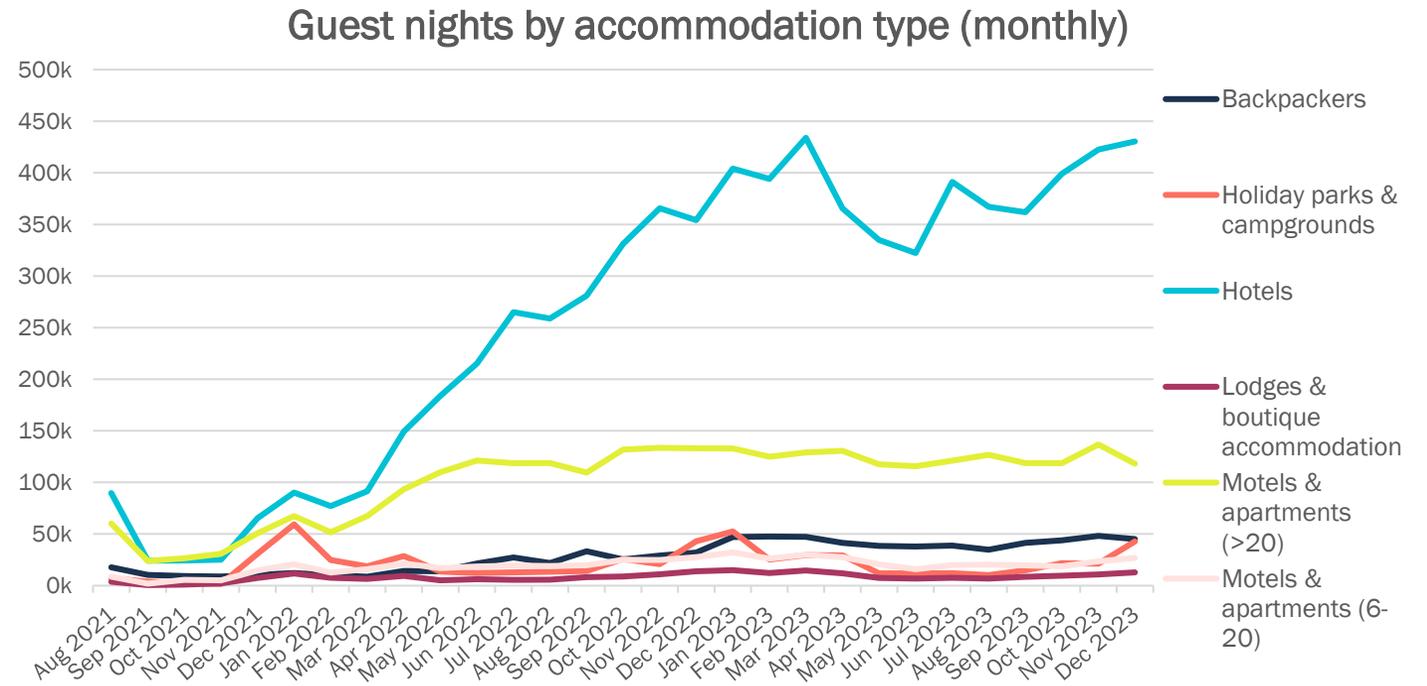
Guest nights in commercial accommodation - Auckland



December 2023	Auckland	% change	New Zealand	% change
Total guest nights	675,800	11.6%	4,068,000	6.5%
Domestic guest nights	377,400	-7.0%	2,600,900	-4.6%
International guest nights	298,400	49.5%	1,467,100	34.4%

# 430.4k guest nights in hotels in December 2023, up 21.5%

- For the month of December 2023, there were 430.4k guest nights in hotels in Auckland, up 21.5% compared to December last year.
- Guest nights in backpacker accommodation (up 40.6% to 45.0k) increased in December 2023.
- Guest nights in holiday parks and campgrounds (42.7k) were down slightly (0.5%) for the month of December.
- There were 118.1k guest nights in motels and apartments (>20) (down 11.3%), and 26.8k guest nights in motels and apartments (6-20) (down 2.9%) in December 2023.
- Guest nights in lodges and boutique accommodation decreased (down 7.9% to 12.8k).

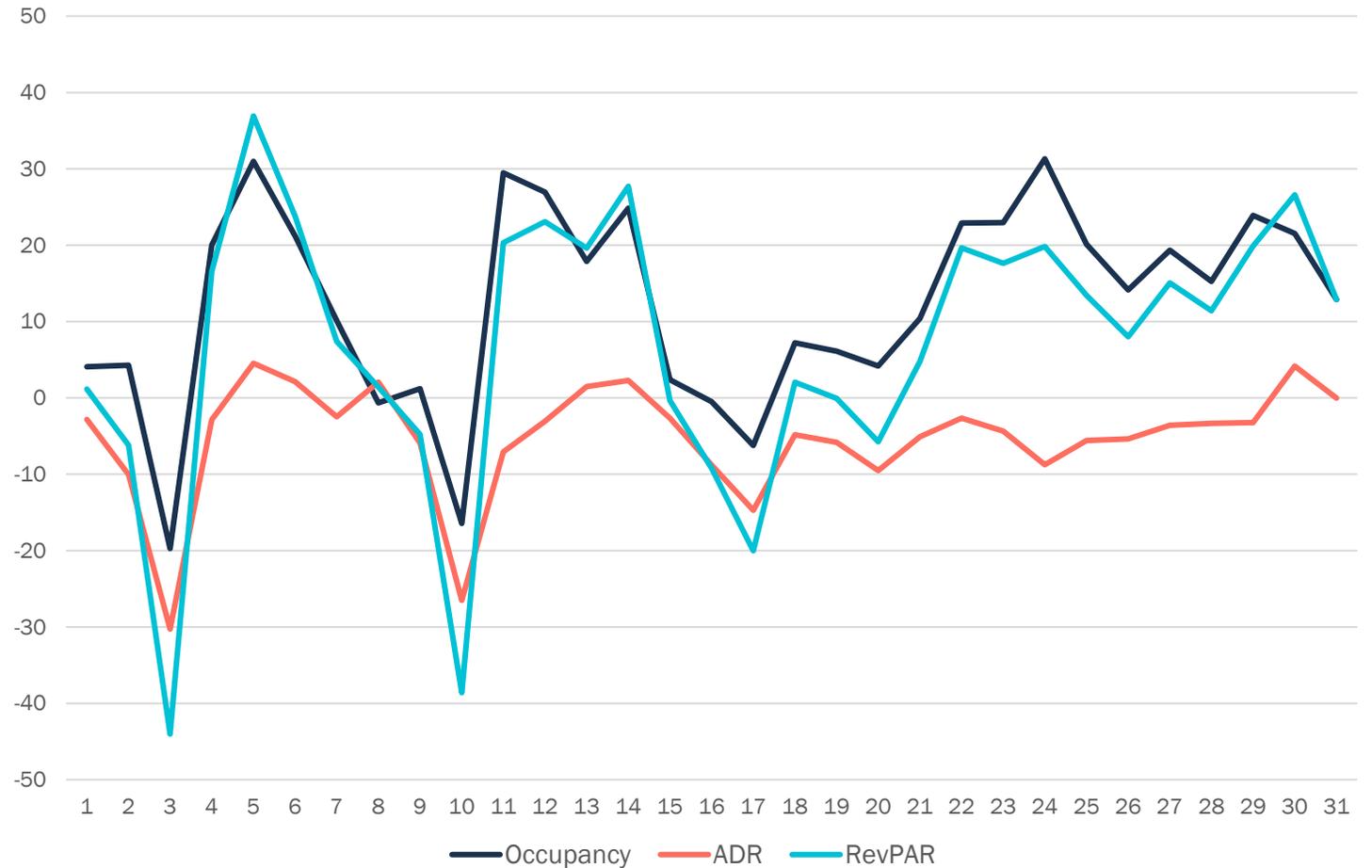


December 2023	Guest nights	% change
Hotels	430,400	21.5%
Motels & apartments (>20)	118,100	-11.3%
Motels & apartments (6-20)	26,800	-2.9%
Backpackers	45,000	40.6%
Holiday parks & campgrounds	42,700	-0.5%
Lodges & boutique accommodation	12,800	-7.9%

# Occupancy was **11.0%** higher in December 2023, compared to 2022

- **Occupancy was 11.0% higher** during the month of December 2023, compared to December 2022.
- **Revenue per available room (RevPAR) was 4.6% higher** in December 2023 compared to last year.
- **Average Daily Rate (ADR) was down (5.6%)** on last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in December 2023. ADR and RevPAR peaked on Tuesday 5<sup>th</sup> December while Occupancy peaked on Sunday 24<sup>th</sup> December 2023.

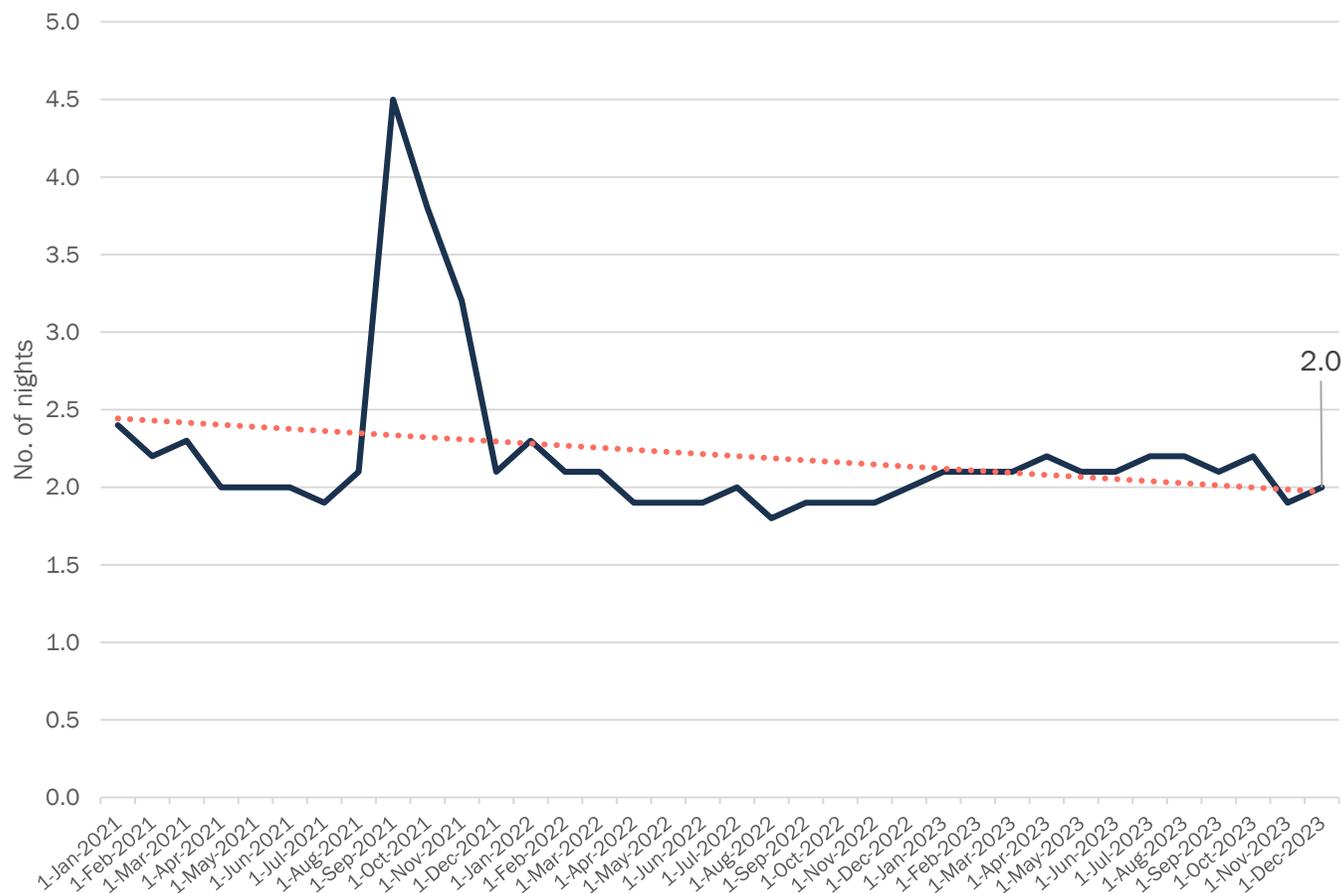
Percent Changes for the Month of December



# On average, visitors stayed 2.0 nights in Auckland for the month of December 2023

- On average, visitors stayed in Auckland for 2.0 nights for the month of December 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.

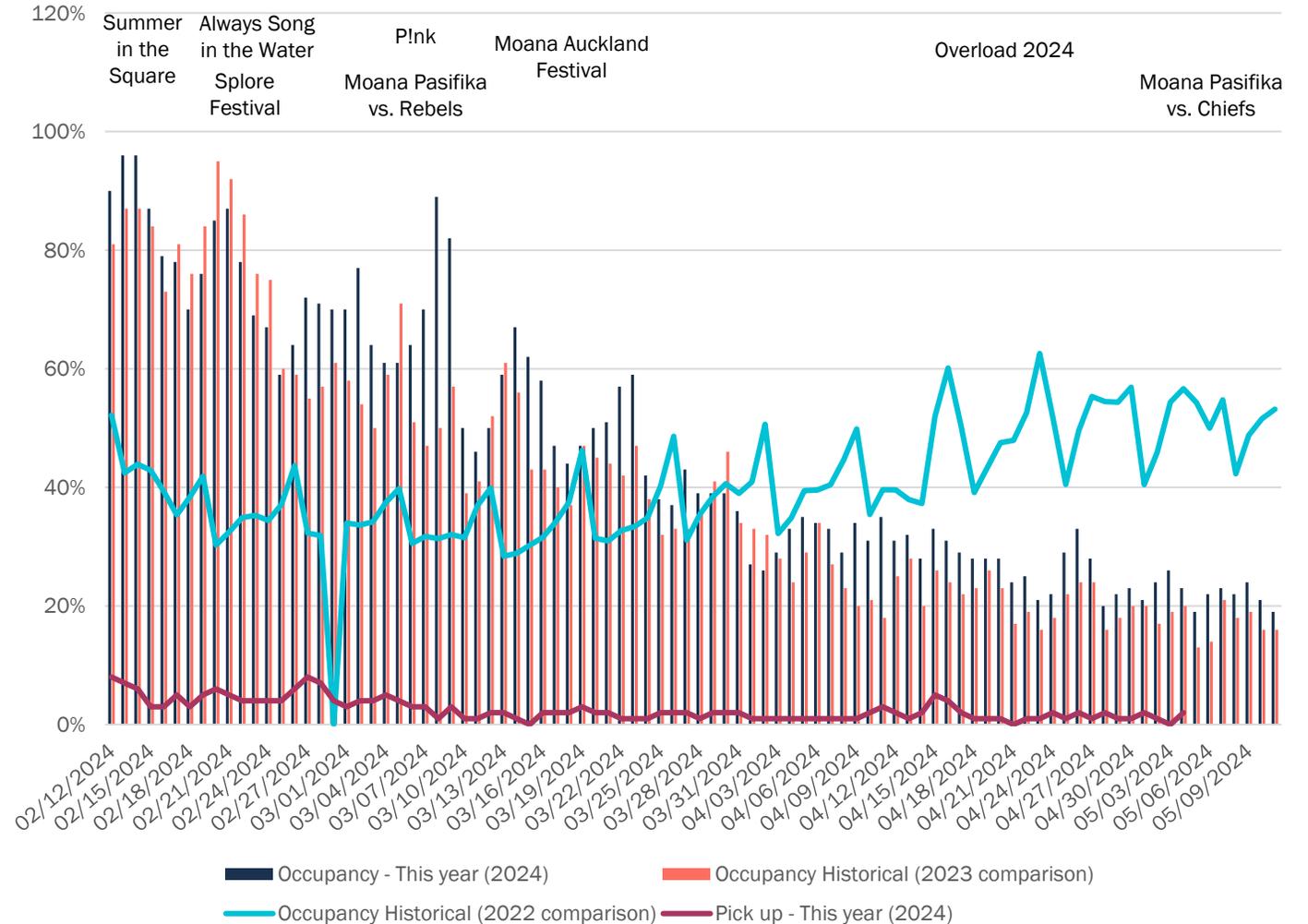
Average length of stay for visitors to Auckland



# 90 Day Forward Booking Occupancy Data

- Looking forward (over the next three months), overall occupancy on the books is higher for the period from February to May 2024 in comparison to last year.
- Occupancy hit 96% on the 13<sup>th</sup> and 14<sup>th</sup> of February 2024 (Valentine's Day).
- Occupancy on the books is also set to reach 89% on Friday 8<sup>th</sup> March 2024, when P!NK will be performing at Eden Park.

Occupancy - 90 Day Forward Outlook



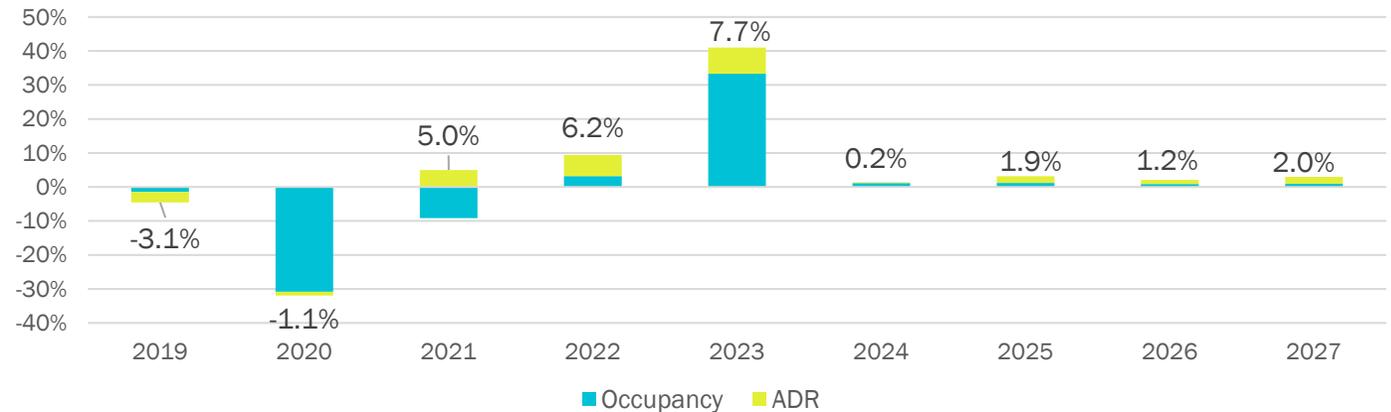
# Longer term projections

- 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



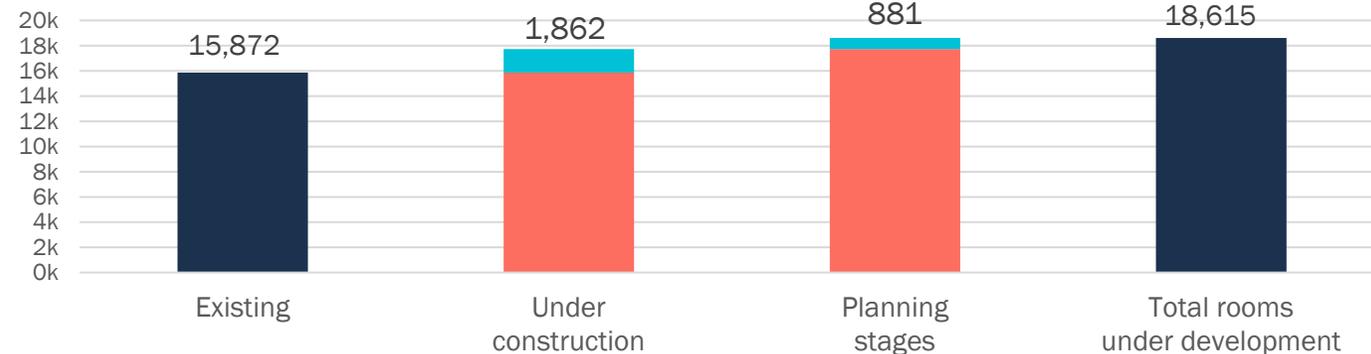
# 15.8k rooms available in 2023 and 18.6k rooms under development

- 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.
<b>Actual</b>	2019	13,786	2.7%	360
	2020	14,161	2.7%	375
	2021	14,920	5.4%	759
	2022	15,329	2.7%	409
<b>Forecast</b>	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

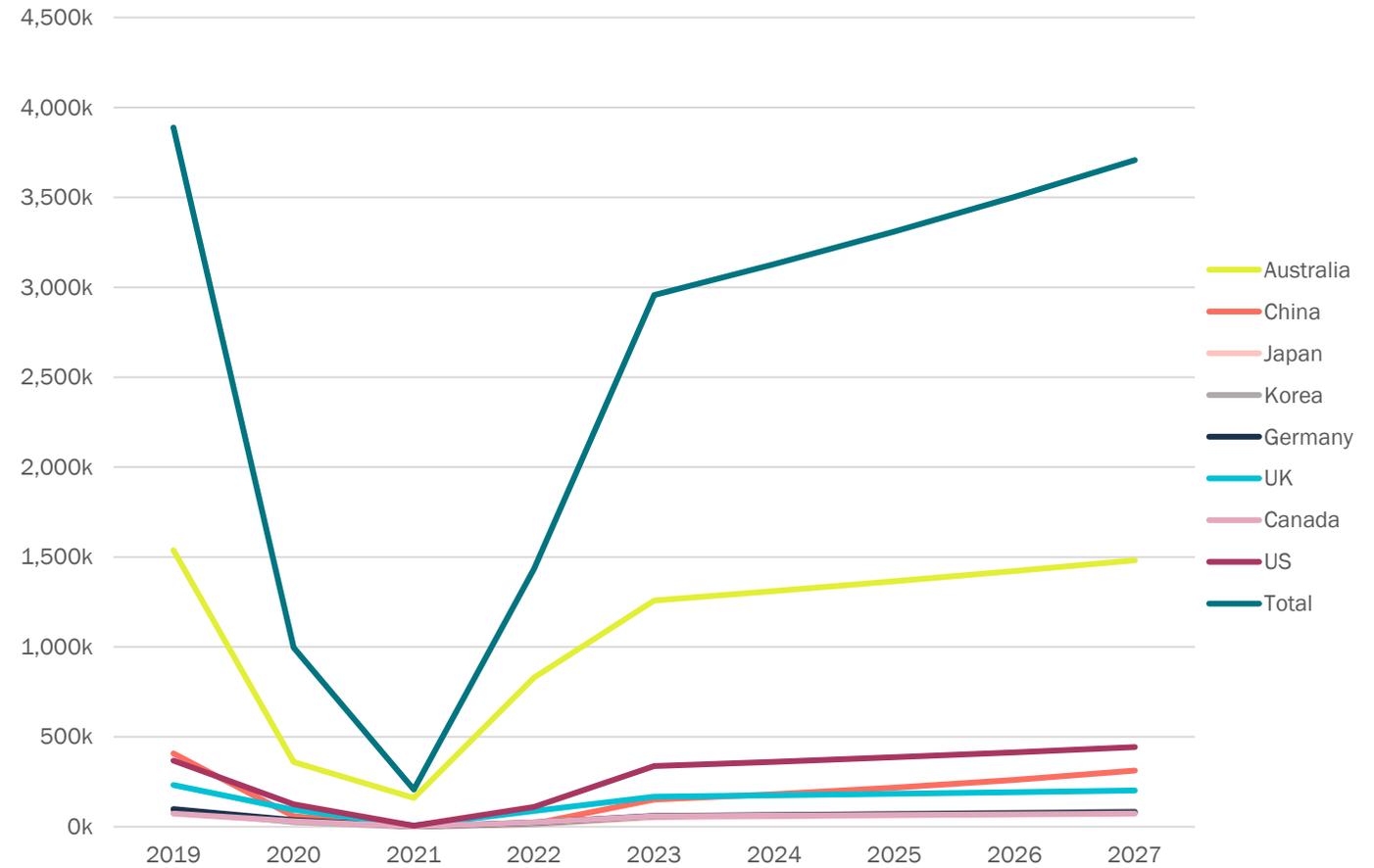
**Rooms by phase**



# In total, 3.71m visitors are projected to visit New Zealand in YE December 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 3.71m international visitors by YE December 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%. 1.48m Australian visitors are expected to visit New Zealand in the year to December 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



[aucklandunlimited.com](https://aucklandunlimited.com)

Event	Date	Venue	Interesting Findings
2023 Farmers Santa Parade	26 November - 26 December 2023	Aotea Square	
Hansel & Gretel	30 November – 3 December 2023	Aotea Centre	<ul style="list-style-type: none"> <li>The month of December saw 298.5k international visitors, up 15.6% on December 2022.</li> </ul>
Bold Steps 2023	1 December 2023	Viaduct Events Centre	<ul style="list-style-type: none"> <li>For the month of December 2023, there were 675.8k total guest nights in commercial accommodation in Auckland, up 11.6% on the same month last year.</li> </ul>
A Very Tasty Christmas Market	2-3 December 2023	Queens Wharf	
Auckland Live Christmas in Aotea Square	9-21 December 2023	Aotea Square	<ul style="list-style-type: none"> <li>Occupancy peaked on Sunday 24<sup>th</sup> December 2023 (Christmas Eve).</li> </ul>
Ocean Globe Race	16 December 2023 – 14 January 2024	Waitematā Harbour	
Love Actually in Concert	16 December 2023	The Civic	



# Auckland – Business Events Data

# Business Events Insights Q4 Dec 2023



[aucklandunlimited.com](https://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

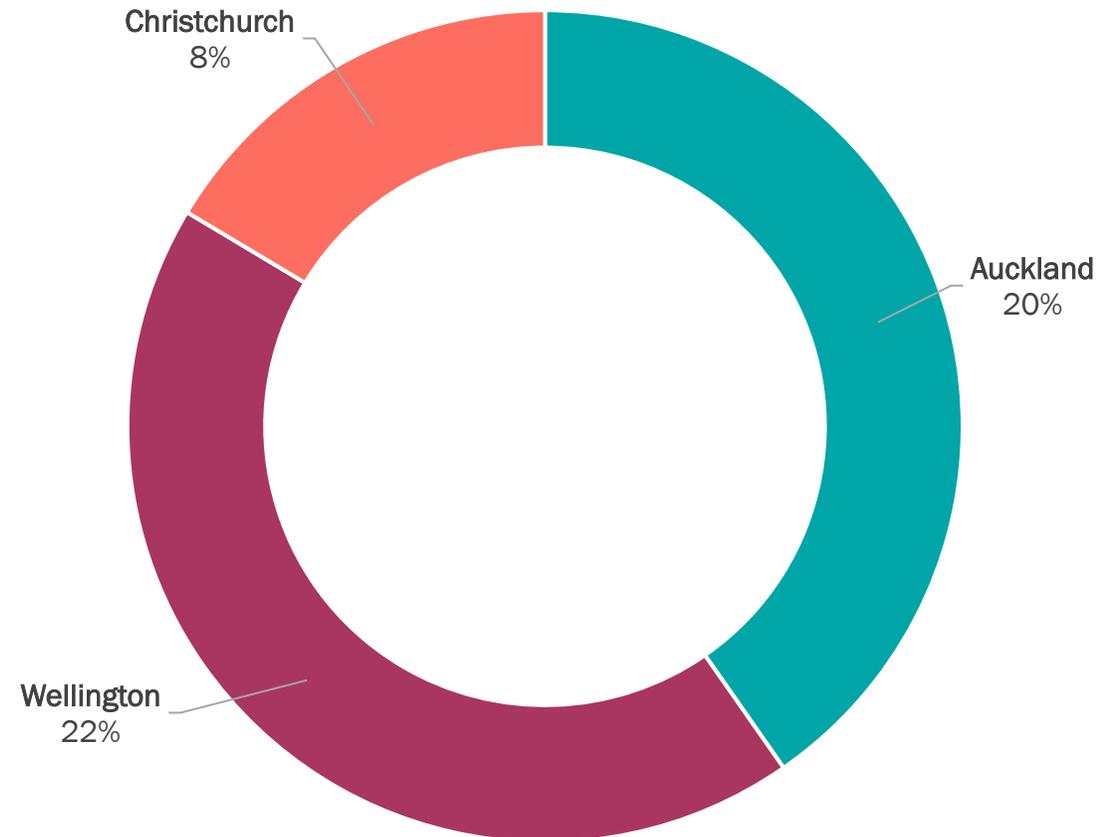


# Auckland had the second largest market share of business events in NZ in Q4 Dec 2023



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### Business Event Market Share - Regional Comparison



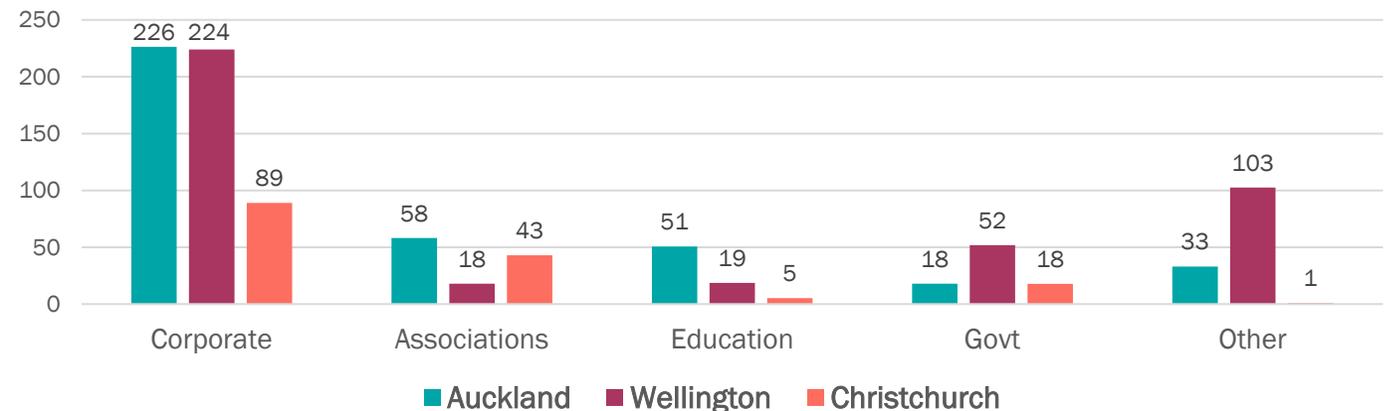
# Auckland hosted the most conferences, other business events and expos in NZ Q4 Dec 2023

- 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

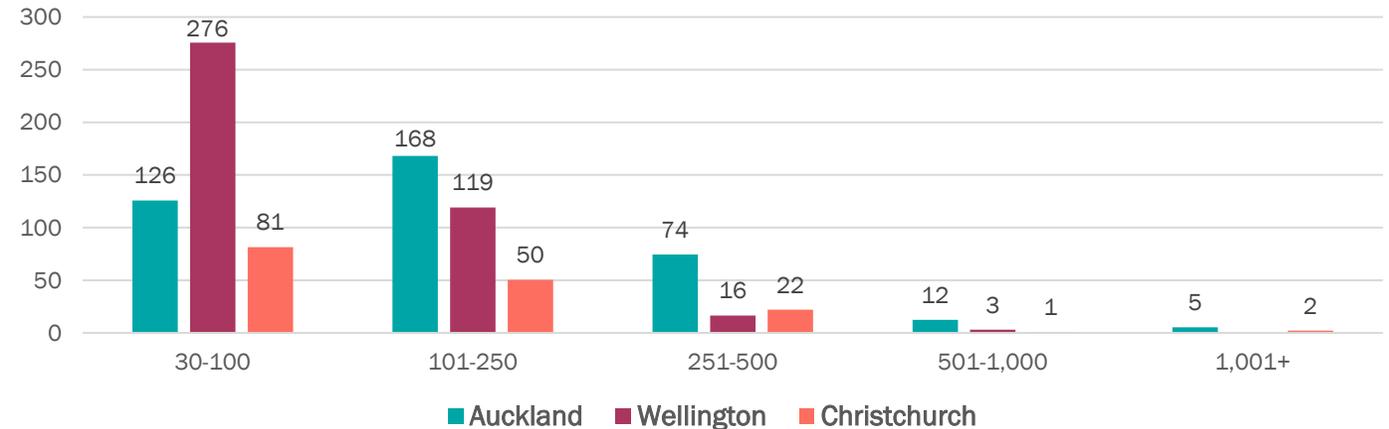


# 32% of all business events in Auckland were multi-day events in Q4 Dec 2023

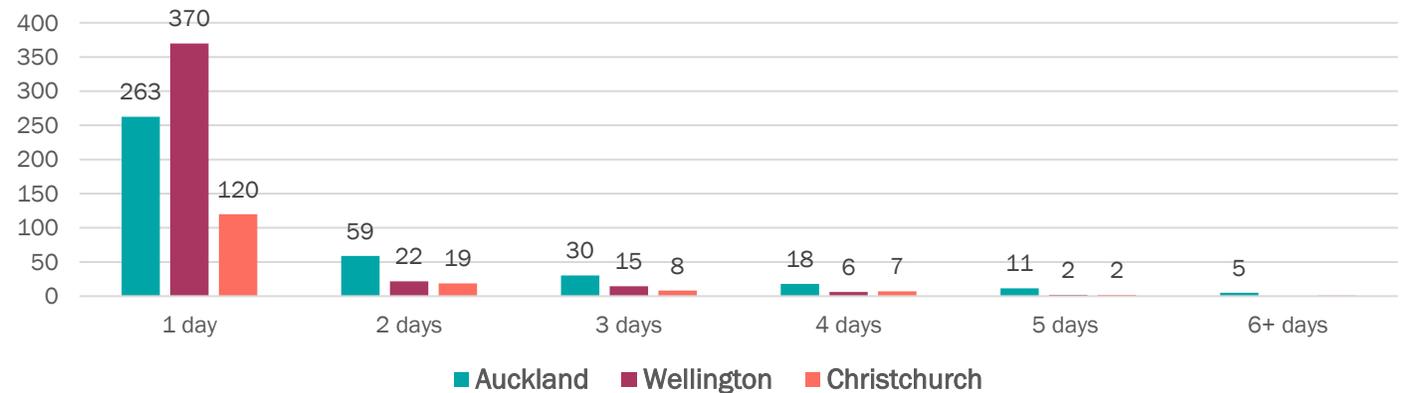
- In Q4 2023, a third of all business events held in Auckland were smaller events hosting between 30-100 delegates (126 events). In comparison to other regions, Wellington hosted most small business events (276 events).
- 44% of business events in Auckland were medium-sized events with 168 events that hosted 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](http://aucklandunlimited.com)

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



[aucklandnz.com](http://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%**

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**

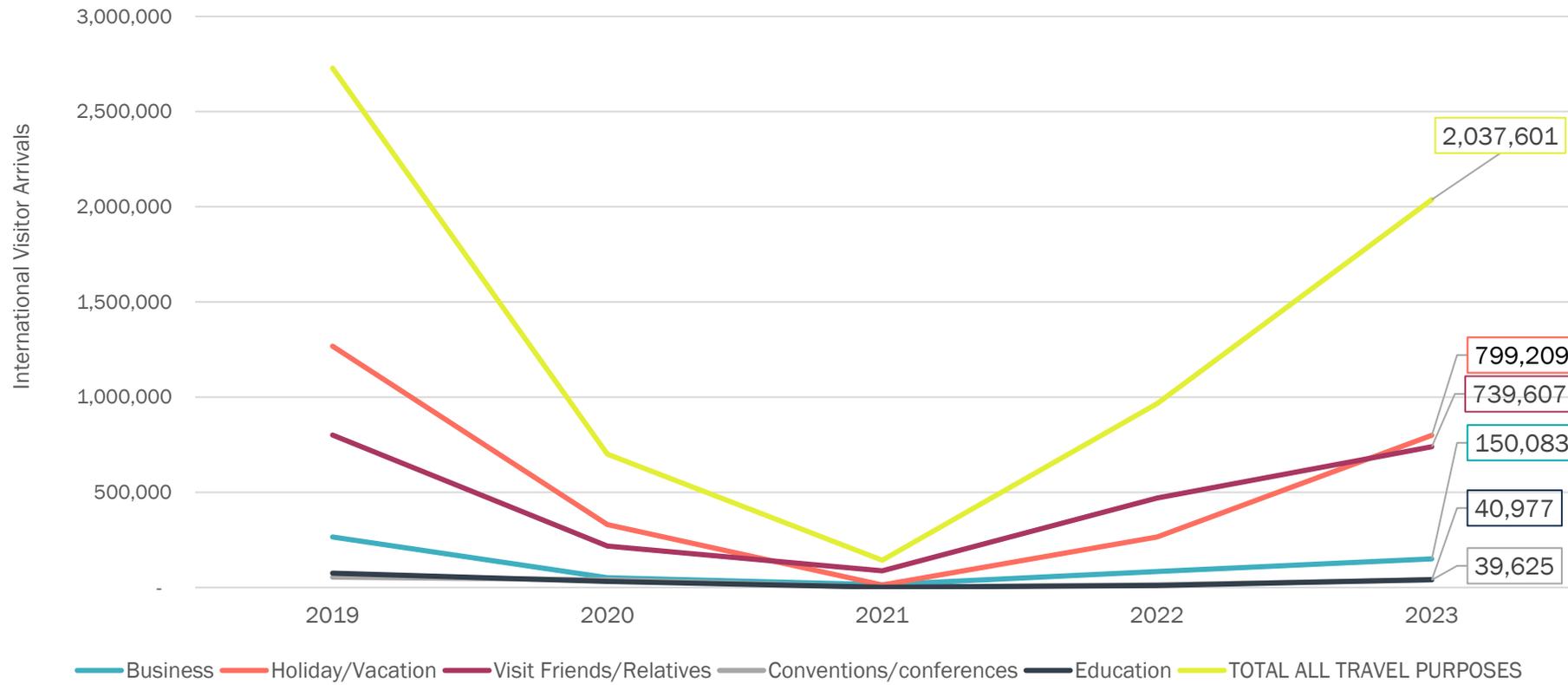
Compared to  
YE June 2021

*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.*

A serene sunset scene over a calm body of water. The sun is low on the horizon, creating a bright, golden glow that reflects on the water's surface. Two people are visible on paddleboards in the distance, silhouetted against the bright light. The sky is a mix of soft orange and pale blue, with a few wispy clouds on the right side. In the background, a range of low mountains or hills stretches across the horizon.

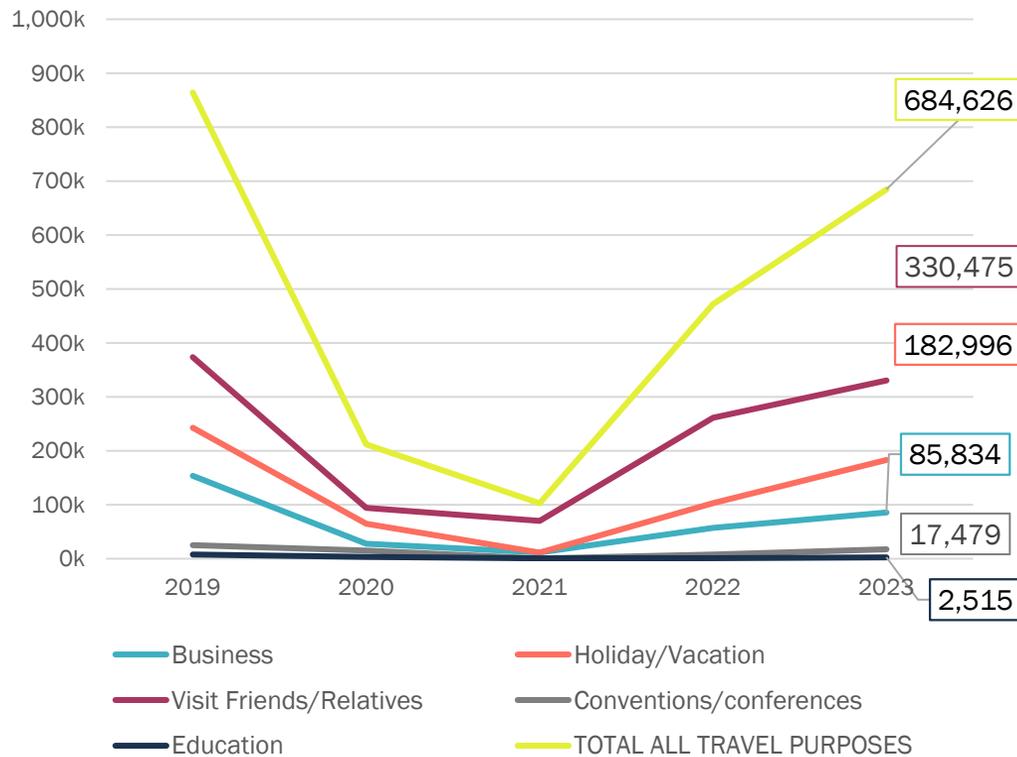
# Five-year trends in key markets

# Five-year visitor arrivals to Auckland, YE December

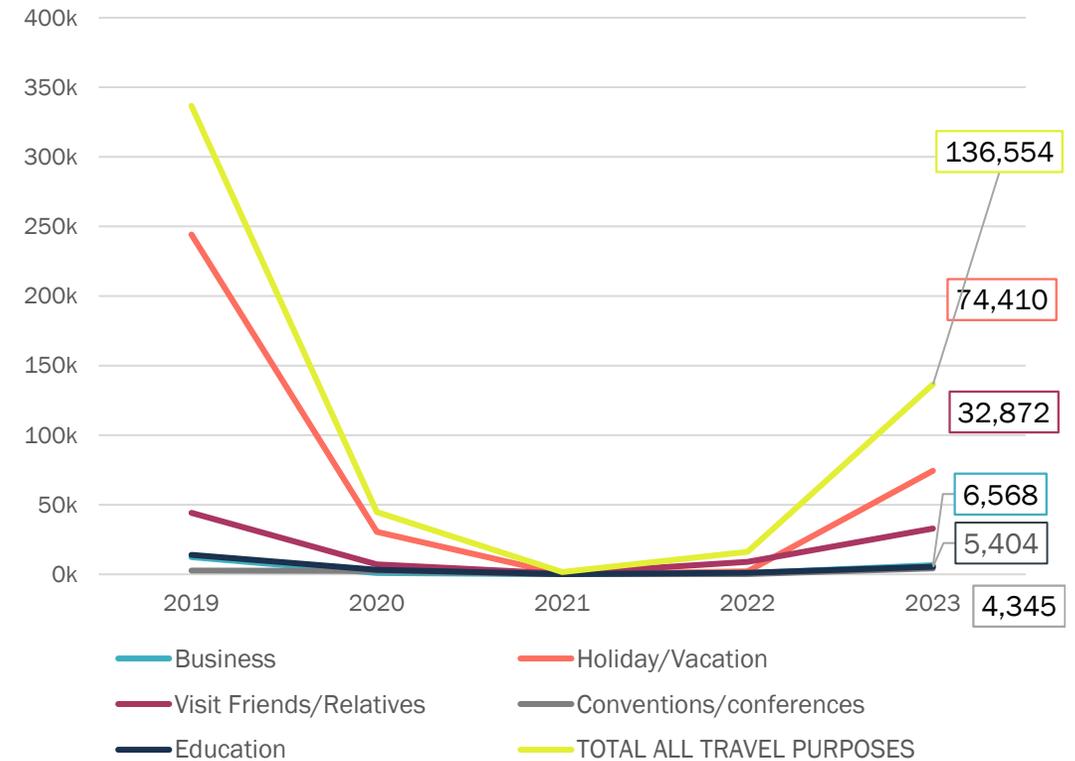


# Five-year visitor arrivals to Auckland, YE December

## Australia

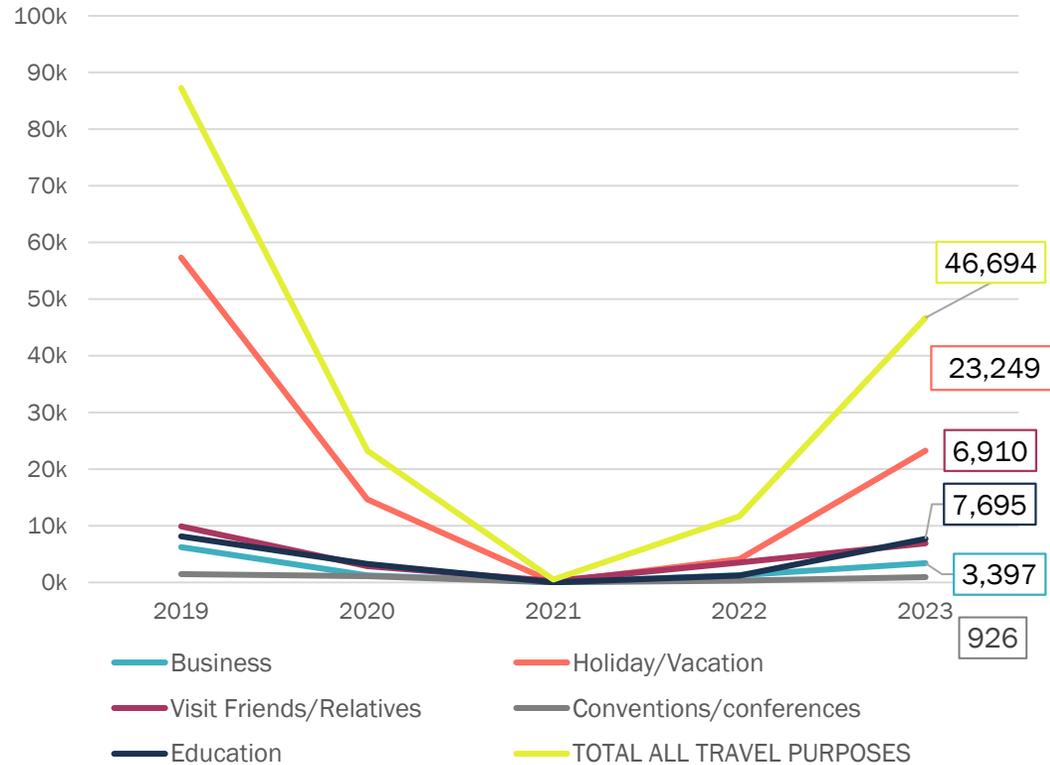


## China

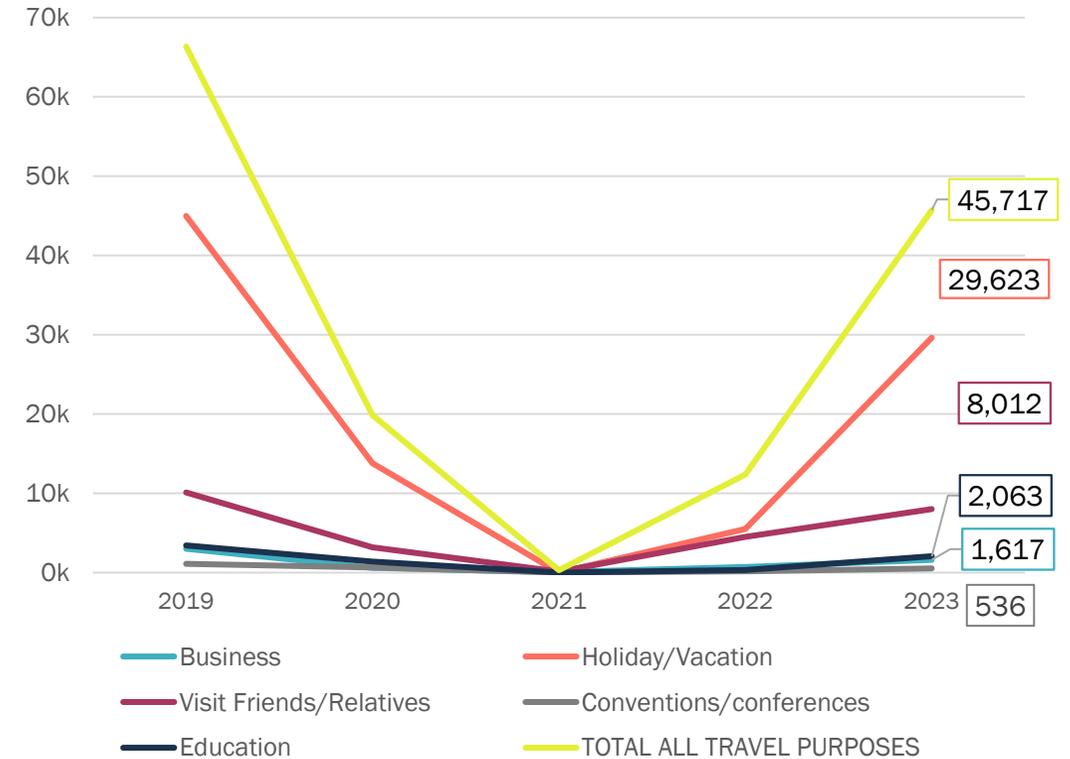


# Five-year visitor arrivals to Auckland, YE December

## Japan

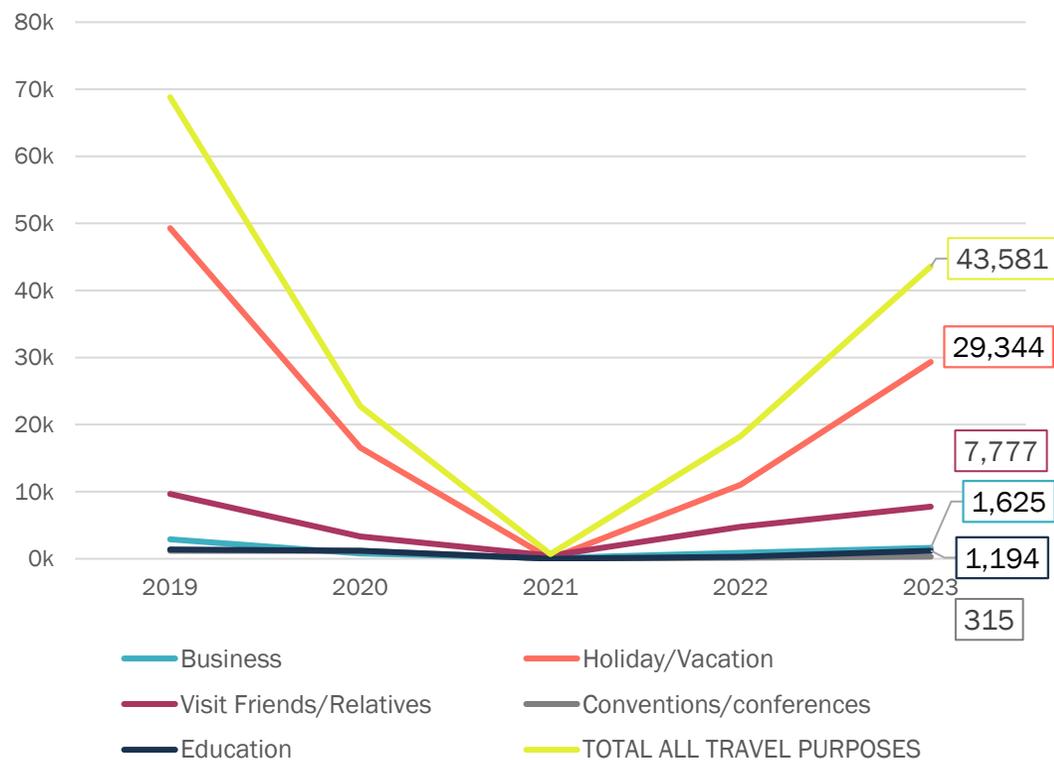


## Korea

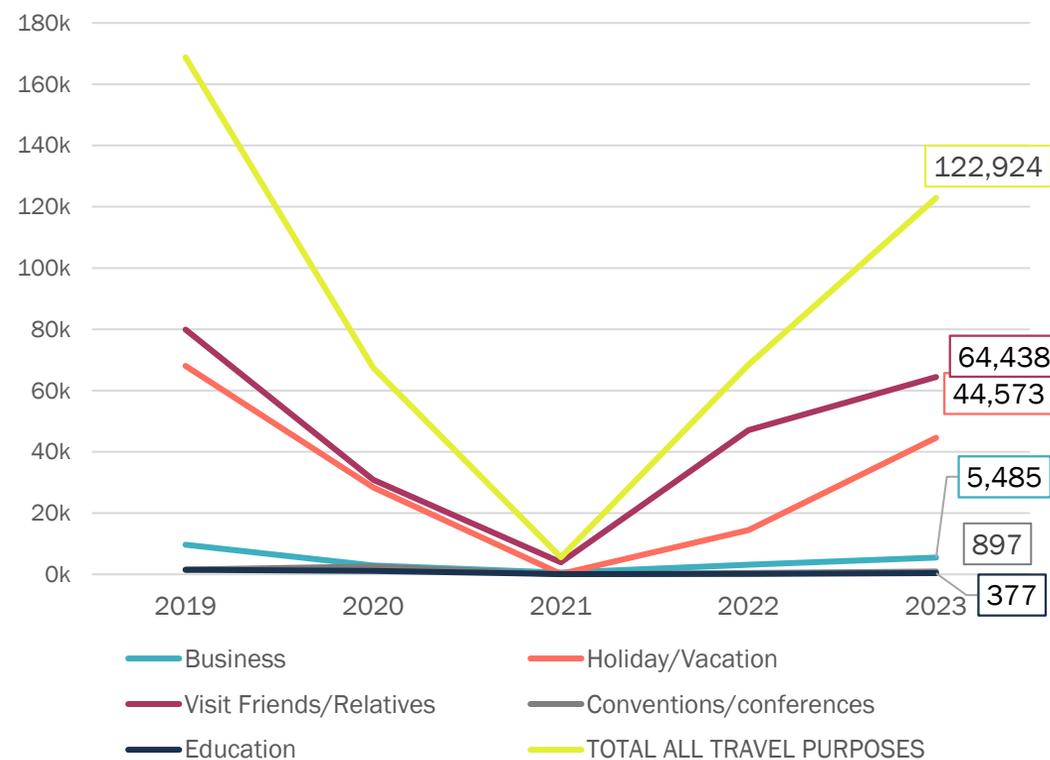


# Five-year visitor arrivals to Auckland, YE December

## Germany

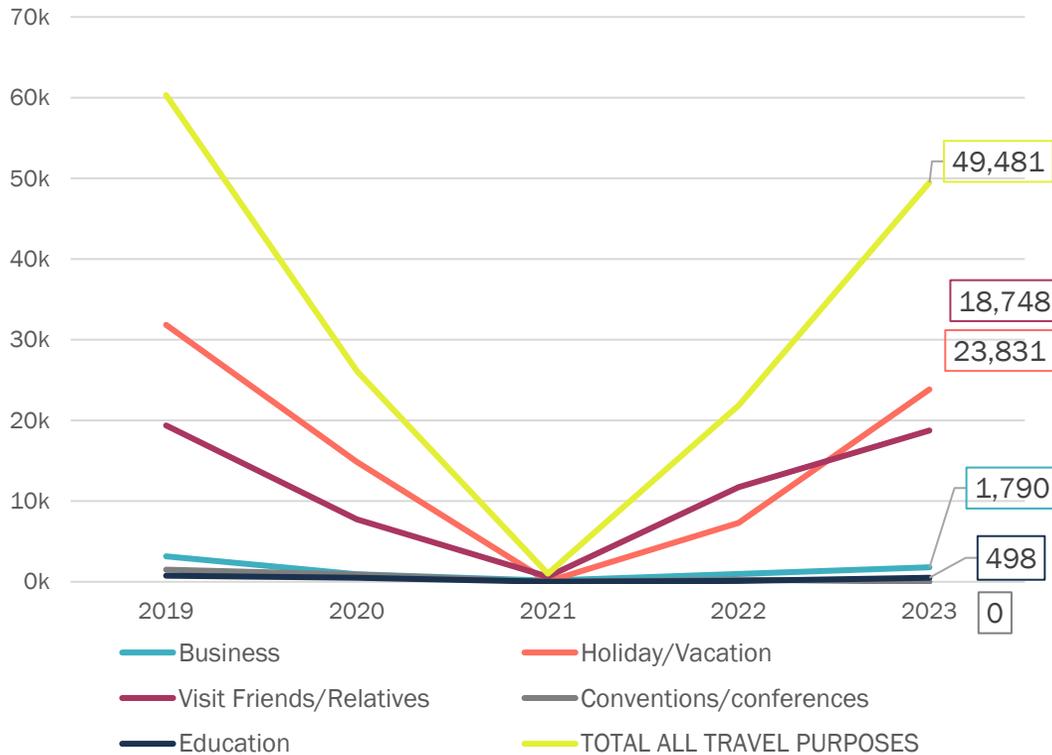


## UK

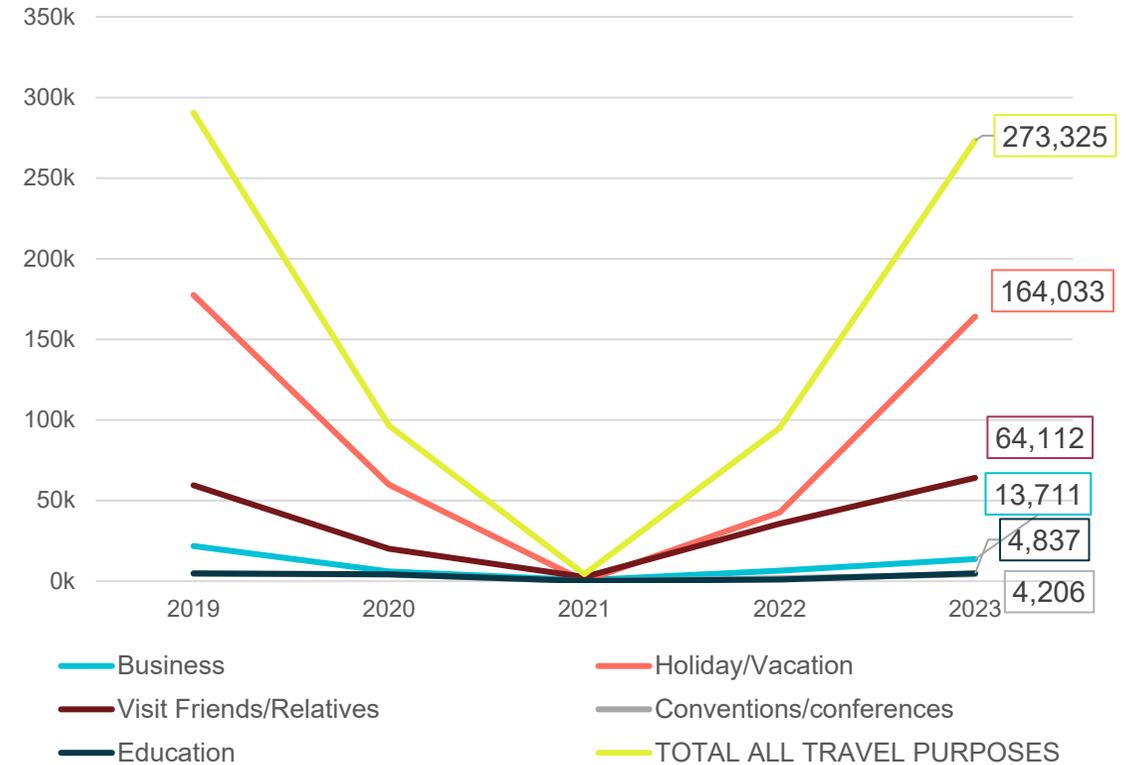


# Five-year visitor arrivals to Auckland, YE December

## Canada



## US



# Ngā mihi Thank you

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