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## **Key Visitor Data**





#### INTERNATIONAL

- Monthly international visitors (255.6k) were up 37.2% on February 2023 (186.3k) but numbers were down 1.5% compared to February 2020 pre-Covid (259.4k).
- The year to February 2024 saw 2.15m international visitor arrivals, an increase of 63.7% on 2023. However, international visitation was down 20.2% compared to pre-Covid levels (2.70m in YE February 2020).
- There was an increase in visitors from the Australian market in February 2024, with 61.6k visitors, up 15.1% compared to last year. The year to February 2024 saw 695.2k Australian visitors, up 19.4%.
- Holiday visitors (880.1k) contributed the most to annual visitor numbers and increased 111.1% in the year to February 2024. Monthly numbers (128.3k) were up 67.1% compared with February 2023.
- VFR visitors (753.9k) were up 27.1% for the year, with monthly numbers (71.5k) up 9.7%.
- 320.5k international guest nights in commercial accommodation for February, up 35.7% 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 **374.1k domestic guest nights in commercial** accommodation for the month of February, down 5.6%.
- 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 February 2024, there were 694.6k total guest nights in commercial accommodation in Auckland, up 9.8% on last year.
- On average, visitors stayed in Auckland for 1.9 nights in February 2024 (down 9.5% on the previous year).
- Average hotel Occupancy for the month was 77.6%, 0.2% higher compared to February 2023.
- The Average Daily Rate for February was \$254 (down 4.4%) and the RevPAR was \$198 (down 4.2% compared to the previous year).
- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Wednesday 14th February 2024 at \$282 (up 2.8% on the previous year). This coincides with Valentines Day.
- Looking forward (over the next three months), overall occupancy on the books is generally higher for the period from April to July 2024 in comparison to last year.
- Occupancy on the books peaked at 75% on Tuesday 9th April 2024.





# 2.15m International visitor arrivals in the year to February 2024, up 63.7%

- The month of February saw 255.6k international visitors, up 37.2% on February 2023 (186.3k) but down 1.5% compared to pre-Covid numbers (259.4k in February 2020).
- The year to February 2024 saw 2.15m international visitor arrivals, an increase of 63.7% on the previous year. However, international visitation was down 20.2% compared to pre-Covid levels (2.70m in YE February 2020).
- Holiday visitors (880.1k) contributed the most to annual visitor numbers and increased 111.1% on the year to February 2024. Monthly holiday numbers (128.3k) were also up 67.1% compared with the month of February 2023.
- VFR visitors (753.9k) were up 27.1% for the year, with monthly numbers (71.5k) up 9.7%.
- There were **153.9k business visitors (up 49.2%)** in the year to February 2024, **and 14.9k for the month (up 20.5%).**

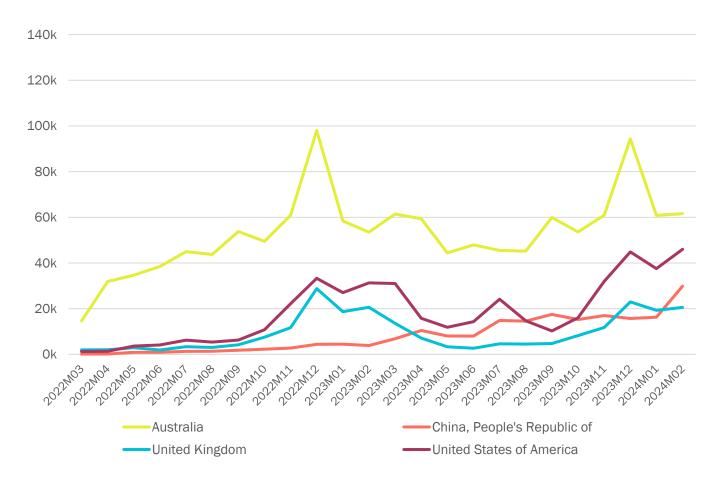




## 695.2k visitors from Australia for YE February 2024, up 19.4%

- There was an increase in Australian visitors in the month of February 2024, with 61.6k visitors, up 15.1% compared to last February. The year to February 2024 saw 695.2k Australian visitor arrivals, up 19.4%.
- The year to February 2024 saw 298.6k visitors from the US (up 95.3%), with 46.0k visitors for the month (up 47.0%).
- Visitors from China (174.4k) were also up for the year (614.0%), and up (671.4%) for the month of February (to 29.9k).
- For the year to February 2024, there were 123.4k visitor arrivals from the UK (up 15.5%) and 20.6k visitors for the month (down 0.3%).

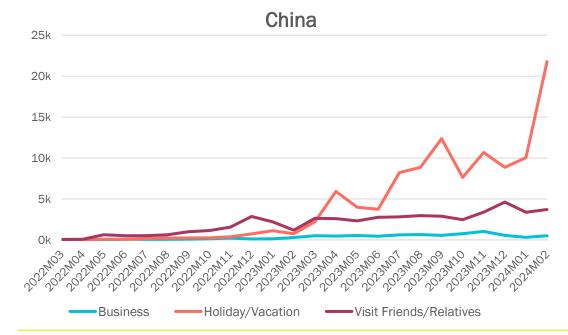
### Visitor arrivals in Auckland by key international markets







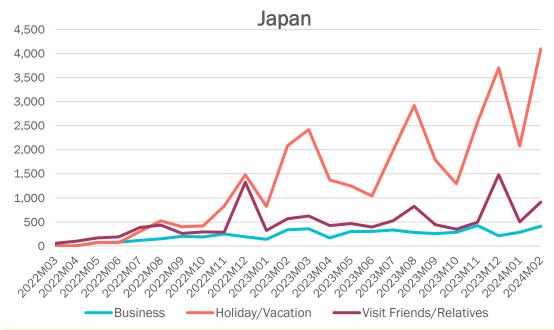
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	8,277	25.7%	18,056	14.8%	27,307	10.3%	61,594	15.1%
YE February 2024	88,454	31.2%	185,279	33.4%	335,648	7.5%	695,190	19.4%



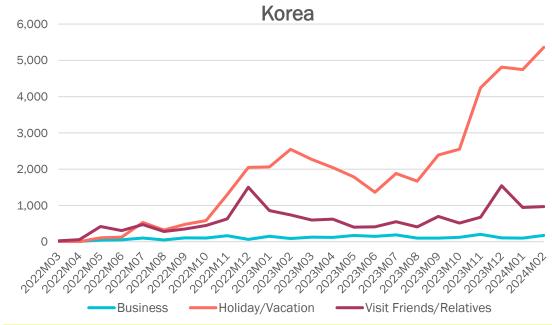
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	510	74%	21,796	2790.7%	3,713	212.0%	29,869	671.4%
YE February 2024	6,958	461.6%	104,388	2481.3%	36,572	195.8%	174,363	614.0%

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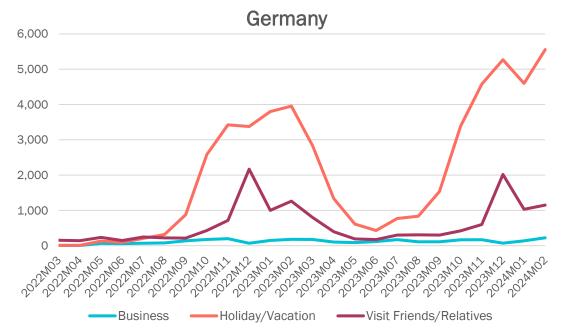
	Business	vs. previous year	Holiday \	/s. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	411	22.0%	4,099	96.7%	913	61.3%	7,530	55.9%
YE February 2024	3,617	109.2%	26,521	278.9%	7,435	69.7%	51,426	168.8%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	175	96.6%	5,361	110.5%	968	31.2%	7,330	85.1%
YE February 2024	1,654	76.9%	35,121	247.3%	8,328	36.9%	51,916	157.8%

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	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	225	24.3%	5,556	40.5%	1,151	-8.7%	7,555	26.3%
YE February 2024	1,657	37.4%	31,743	68.9%	7,695	10.9%	45,987	53.8%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	711	13.6%	9,772	10.1%	8,824	-10.6%	20,565	-0.3%
YE February 2024	5,480	32.1%	46,414	49.7%	63,195	-3.8%	123,444	15.5%

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	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	221	11.1%	5,559	35.1%	2,774	-5.0%	9,295	11.5%
YE February 2024	1,824	41.2%	25,941	70.1%	18,905	13.6%	51,484	40.4%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
February 2024	1,598	20.7%	30,873	64.1%	8,463	13.4%	46,019	47.0%
YE February 2024	13,901	55.0%	184,300	133.6%	66,881	39.5%	298,557	95.3%

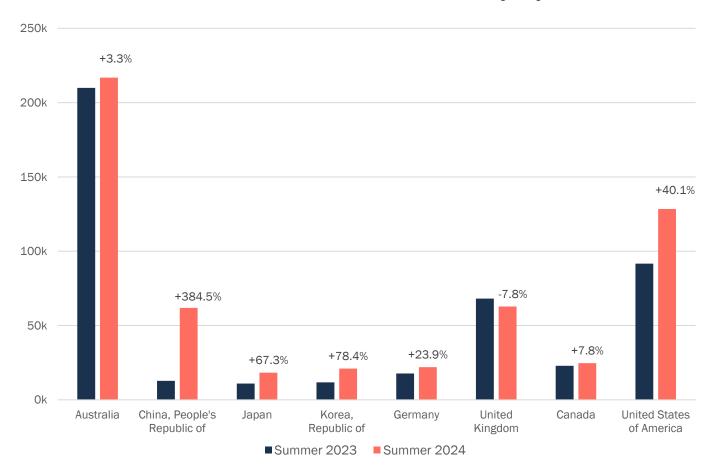
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### 773.1k international visitor arrivals in summer 2023-24, up 25.4% on last summer

- There were 773.1k international visitor arrivals in summer 2023-24, up 25.4% on the previous summer.
- VFR (276.4k, up 2.0%), holiday (351.4k, up 51.0%) and business (32.1k, up 18.2%) arrivals were up compared to summer 2022-23.
- Visitation from Australia (216.8k, up 3.3%) increased in comparison to the previous summer. VFR (113.0k) from Australia was down 0.4%.
- US visitors (128.4k) were up (40.1%) for summer 2023-24, compared to last summer.
- Visitors from the UK (62.8k) were down (7.8%) compared to last year.
- Chinese visitors (61.9k) were up (384.5%) for summer 2023-24, compared to last summer.

### Seasonal international arrivals in Auckland by key markets

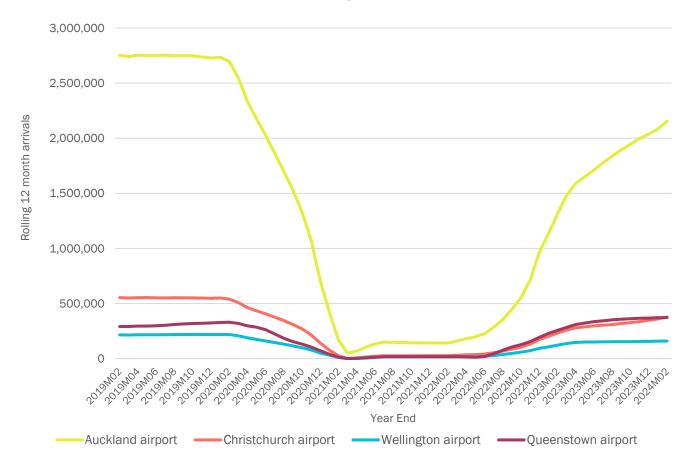




## Auckland has seen a 63.7% increase in international visitor arrivals over the last year

- In the five years proceeding 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 63.7% increase in international visitor arrivals over the last year.
- For the year ending February 2024, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 44.9%, Christchurch was up 61.7% and Wellington was up 30.2% compared to last year.

### 12 month rolling visitor arrivals



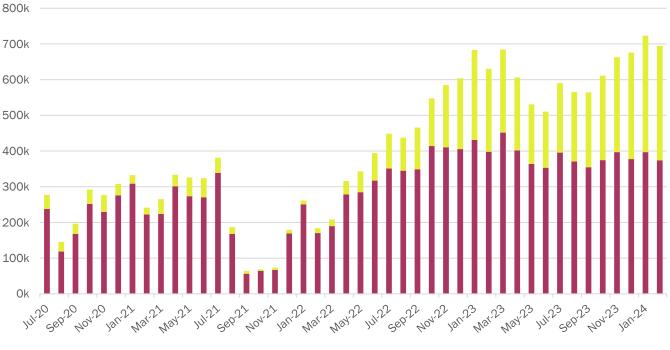




# 694.6k total guest nights in commercial accommodation in February 2024, up 9.8%

- For the month of February 2024, there were **694.6k total** guest nights in commercial accommodation in Auckland, up **9.8%** on the same month last year.
- There were 374.1k domestic guest nights in commercial accommodation (down 5.6), and 320.5k international guest nights (up 35.7%) in commercial accommodation in February 2024.
- For New Zealand overall, there were 4.08m guest nights in commercial accommodation in February 2024, up 15.1% compared to February 2023.

### Guest nights in commercial accommodation - Auckland



■ Domestic guest nights ■ International guest nights

February 2024	Auckland	% change	New Zealand	% change
Total guest nights	694,600	9.8%	4,077,400	15.1%
Domestic guest nights	374,100	-5.6%	2,386,500	5.3%
International guest nights	320,500	35.7%	1,690,900	32.6%

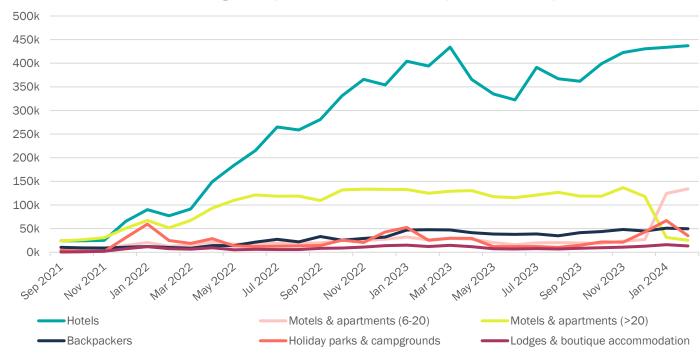


## 437.0k guest nights in hotels in February 2024, up 10.9%

- For the month of February 2024, there were 437.0k guest nights in hotels in Auckland, up 10.9% compared to February last year.
- There were 134.2k guest nights in motels and apartments (6-20), up 414.2% on the previous year.
- However, guest nights in motels and apartments (>20)
   (25.5k) were down (79.6%).
- Guest nights in holiday parks and campgrounds (35.0k) were up (38.3%) for the month of February.
- Guest nights in backpacker accommodation increased (up 4.2% to 49.6k) in February 2024.
- Guest nights in lodges and boutique accommodation were also up (9.9% to 13.3k) for the month.

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### Guest nights by accommodation type (monthly)

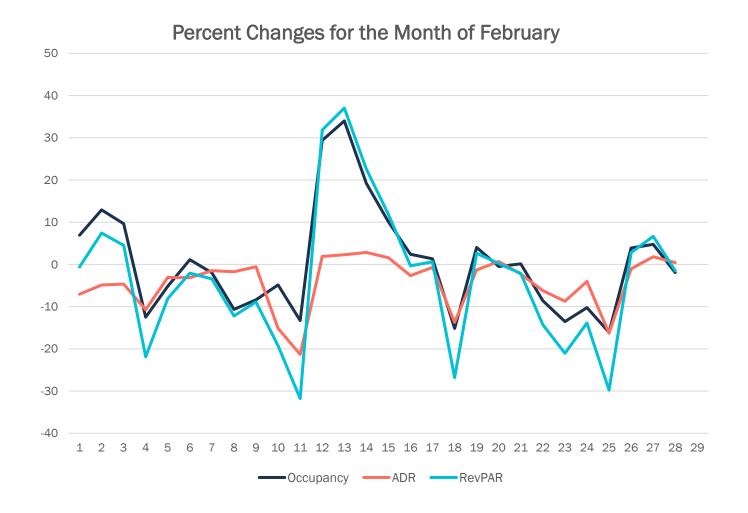


February 2024	Guest nights	% change
Hotels	437,000	10.9%
Motels & apartments (6-20)	134,200	414.2%
Motels & apartments (>20)	25,500	-79.6%
Backpackers	49,600	4.2%
Holiday parks & campgrounds	35,000	38.3%
Lodges & boutique accommodation	13,300	9.9%



## **Average Occupancy for** February 2024 was 77.6%, up 0.2% on 2023

- For the month of February 2024, the average Occupancy was 77.6%, 0.2% higher compared to February 2023.
- The Average Daily Rate (ADR) for the month was \$254, down **4.4**% on last year.
- Monthly Revenue per available room (RevPAR) for February was \$198, 4.2% lower compared to last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in February 2024. ADR peaked on Wednesday 14th February while Occupancy and RevPAR peaked on Tuesday 13th February 2024.

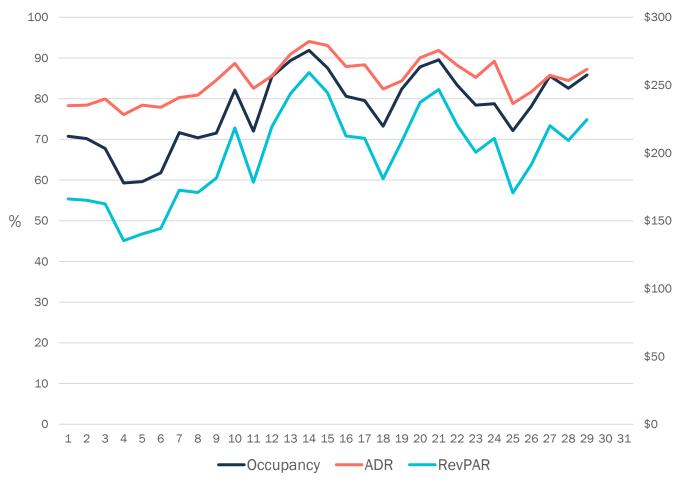




## **Average daily rate was** \$282 on 14<sup>th</sup> February 2024, up 2.8% on 2023

- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Wednesday 14th February 2024 at \$282 (up 2.8% on the previous year). This coincides with Valentines Day.
- Hotel occupancy reached 91.9% on Wednesday 14<sup>th</sup> February **2024** (up 19.2% on the previous year).
- Revenue per available room (RevPAR) peaked to \$259 also on Wednesday 14th February 2024. This was up 22.6% in comparison to last year.

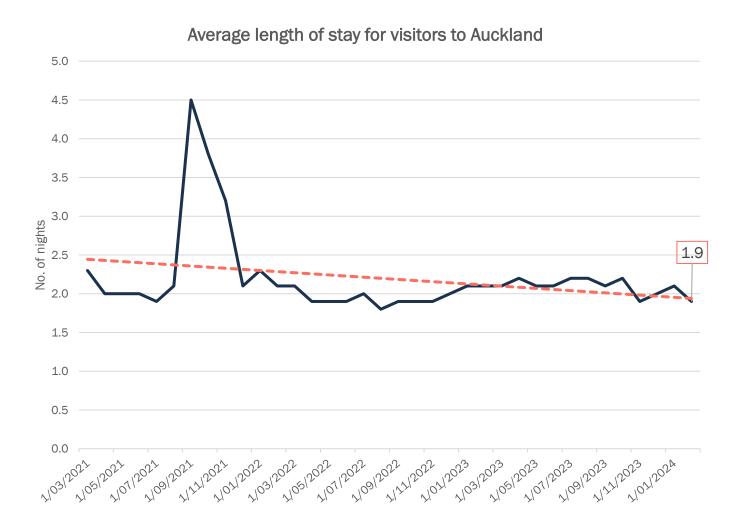
### Daily hotel rates for the Month of January





# On average, visitors stayed 1.9 nights in Auckland for the month of February 2024

- On average, visitors stayed in Auckland for 1.9 nights for the month of February 2024 (down 9.5% 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.

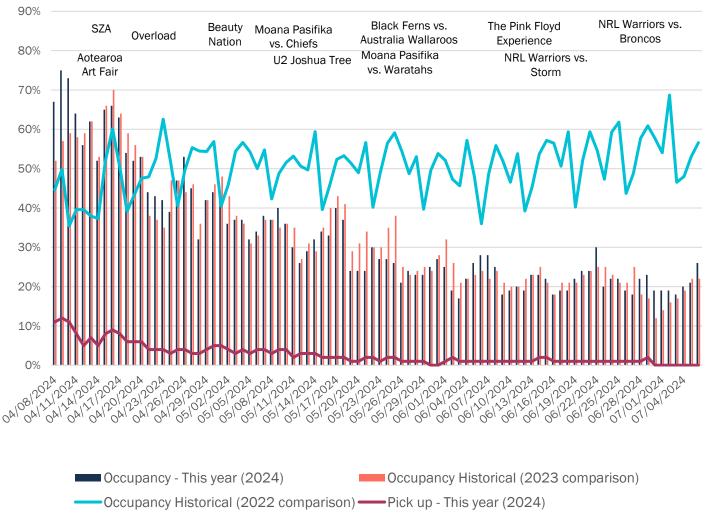




## 90 Day Forward Booking Occupancy Data

- Looking forward (over the next three months), overall occupancy on the books is generally similar for the period from April to July 2024 in comparison to last year.
- There is considerable variance in hotel occupancy when comparing the next three months of 2024 to last year.
- Occupancy on the books peaked at 75% on Tuesday 9<sup>th</sup> April 2024.
- Occupancy also reached 73% on Wednesday 10<sup>th</sup> April 2024.

### Occupancy - 90 Day Forward Outlook





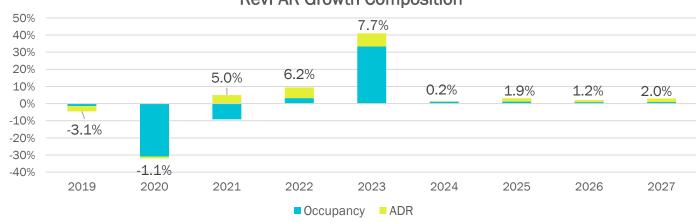
### **Longer term projections**

- 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

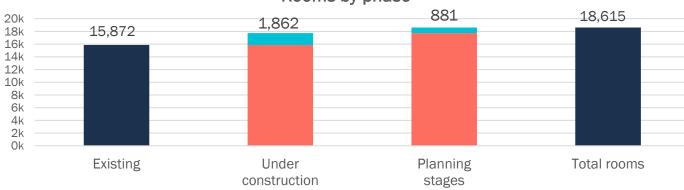
- In 2023, on average there were 15.8k daily rooms available in Auckland. The number of average daily rooms available is set to increase by 3.2%, which will supply an additional 494 rooms (compared to 2022).
- Looking to 2024, average room supply is expected to expand 7.4%, supplying 1.2k new rooms and 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.
	2019	13,786	2.7%	360
	2020	14,161	2.7%	375
Actual	2021	14,920	5.4%	759
	2022	15,329	2.7%	409
	2023	15,823	3.2%	494
	2024	16,987	7.4%	1,164
Forecast	2025	17,408	2.5%	421
	2026	17,605	1.1%	197
	2027	18,030	2.4%	425

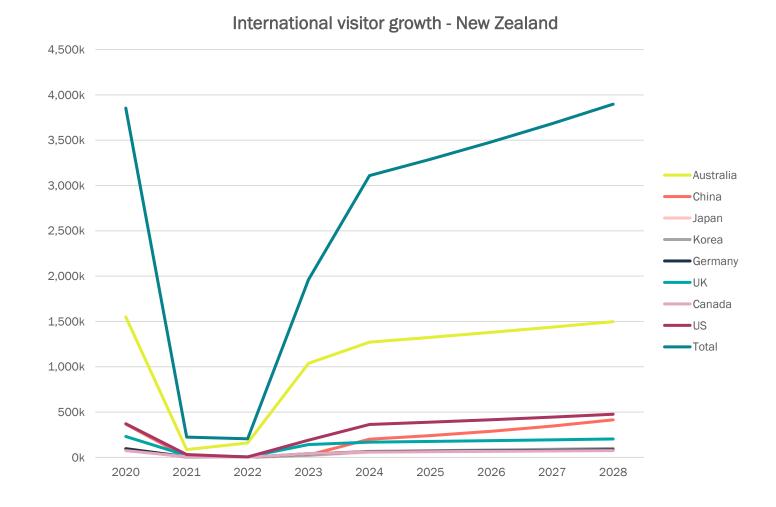






# In total, 3.90m visitors are projected to visit New Zealand in YE February 2028

- 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 3.90m international visitors by YE February 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%. 1.50m Australian visitors are expected to visit New Zealand in the year to February 2028 (bringing visitation close to pre-Covid levels of 1.55m in 2020).



<sup>\*</sup> 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.







## **Major Events Insights** -February 2024



Event	Date	Venue	Interesting Findings
Summer in The Square	February 2024	Aotea Square	
Morning Melodies – Kumeu Vintage Brass	12 - 14 February 2024	Bruce Mason Centre	■ The month of February saw 255.6k international visitors, up 37.2% on February 2023.
St Jerome's Laneway Festival	30 January – 6 February 2024	Western Springs Stadium and Park	■ For the month of February 2024, there were 694.6k total guest nights in commercial accommodation in Auckland, up
Auckland Gin Festival 2023	3 - 4 February 2024	Queens Wharf	9.8% on the same month last year.
Synthony in the Domain	10 February 2024	North Harbour Stadium	■ For the month of February 2024, the average Occupancy was 77.6%, 3.8% higher compared to February 2023.
Auckland Lantern Festival	22 - 25 February 2024	Manukau Sports Bowl	
Moana Auckland Festival	24 February – 24 March 2024	Te Wero Island in the Viaduct	



## Synthony in the Domain Key Insight

35.6<sup>k</sup>

**Attendance** 

Visitor Spend

\$3.4<sup>m</sup>

**GDP** 



3





**26.0**%

Attendees from outside of Auckland

\$4.0<sup>m</sup>

\$4.2<sup>m</sup>

Event operations expenditure in the region



Visitor nights







### **Synthony in the Domain**

Synthony in the Domain was a breath-taking fusion of electronic dance music, live orchestra, DJ's, internationally acclaimed performers, and spectacular visuals held at the Auckland Domain on Saturday 10<sup>th</sup> February 2024.

#### Key Insight

- 35.6k attendees
  - o 26.4k Aucklanders
  - o 8.1k Domestic
  - 1.0k International
- 26% attendees from outside of Auckland
- \$3.4m GDP
- \$4.2m spend by visitors
- 15.6k visitor nights
- \$4.24m event operations expenditure in the region



## **Auckland Lantern Festival Key Insight**

109.8<sup>k</sup> \$2.5<sup>m</sup>

\$396k

**Attendees** 

**Spend** 

**GDP** 









\$1.9<sup>m</sup>



Overall event Attendee Satisfaction

Net benefit of Festival for Auckland

Likelihood to attend event in future







## **Auckland Lantern Festival**

The BNZ <u>Auckland Lantern Festival</u> returned after a four-year hiatus in 2024, ringing in the Year of the Dragon in a brand-new venue at the Manukau Sports Bowl. Across four days (from 22-25 February) the festival featured over 500 lanterns, traditional and contemporary performances, and more than 40 food and craft stalls.

#### Key Insight

- 109.8k attendees (93% were Aucklanders)
- \$2.45m total spend by visitors
- \$396.2k GDP
- 2.5k visitor nights
- \$1.92m net benefit of Lantern Festival for Auckland
- 20% social cost-benefit return on investment
- 75% Satisfaction with overall event
- 95% Likelihood to attend event in future
- 8/10 Net Promoter Score





### Highlights of the month: Major events coverage

- BNZ Auckland Lantern Festival returned for the first time in four years, earning 46 pieces of coverage with a cumulative potential reach of 3,119,053 and an Equivalent Advertising Value of NZD \$880,384.
- Ahead of the launch of Moana Auckland, New Zealand's Ocean Festival, TVNZ Breakfast ran six live crosses from the Moana Auckland festival hub precinct highlighting the inaugural festival. Moana Auckland events and festival hub content featured in the Heart of the City's weekly newsletter that has 30k subscribers and Auckland Live's weekly newsletter that has 170k subscribers.







## Auckland Lantern Festival returns with dazzling light displays

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A vibrant silk lantern of a dragon measuring 30 meters in length dazzled thousands at the opening of the Auckland



## Looking ahead: March 2024

- Moana Auckland continues until 24 March
- Pasifika Festival is happening on 9-10 March
- Australia Roadshow media event, 6
   March
- Two media and two content creators on famil in late March
- Ongoing pitching and media engagement in Australia and North America markets
- Submitting entry for *Time*Magazine's World's Greatest Places
- Supporting two major North American productions for destination outcomes





## Business Events Insights Q4 Dec 2023

386

Do

84.4<sup>k</sup>

204.1<sup>k</sup>

Business events in Auckland

**Delegates hosted in Auckland** 

Delegate days hosted in Auckland





**20**%

29%

**37**%

Auckland's market share of business events

Auckland's market share of delegates

Auckland's market share of delegate days









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





#### Total number of delegates – Regional comparison



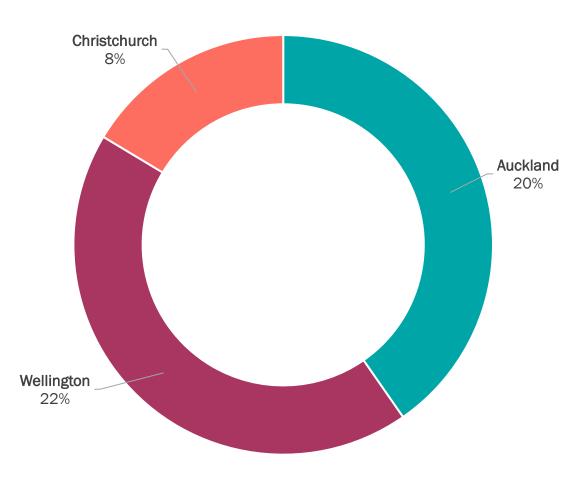


## Auckland had the second largest market share of business events in NZ in Q4 Dec 2023



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### **Business Event Market Share - Regional Comparison**

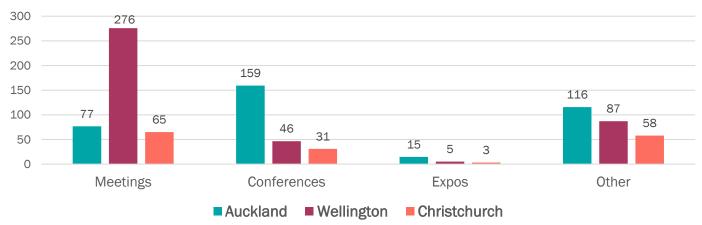




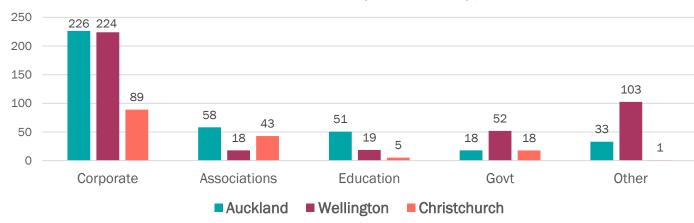
# Auckland hosted the most conferences, other business events and expos in NZ Q4 Dec 2023

- 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**

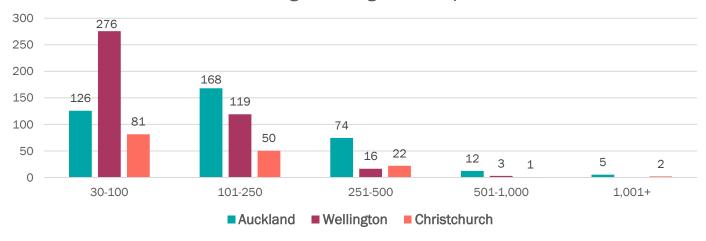




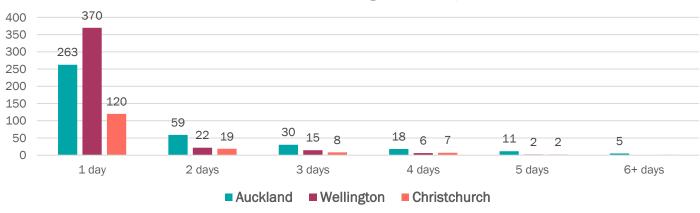
## 32% of all business events in Auckland were multi-day events in Q4 Dec 2023

- 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 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 multiday events. 15% were held for a duration of two days (59), and 8% ran over the course of three days (30).

### No. of delegates - Regional comparison



#### **Duration of event - Regional comparison**







## **Visitor Experience**



aucklandnz.com

30%

**Promoters Net Promoter Score** YE June 2022 -3



**NPS** 

Total **Net Promoter Score** YE June 2022 -6



**Detractors Net Promoter Score** YE June 2022 -3



**Total Satisfaction** Overall experience in Auckland YE June 2022 -0.1





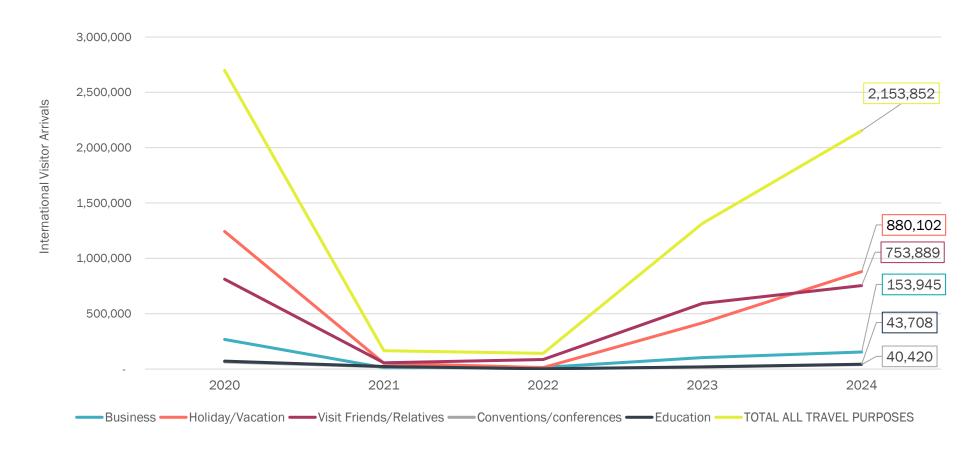
### **Net Promoter Score**

- 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).

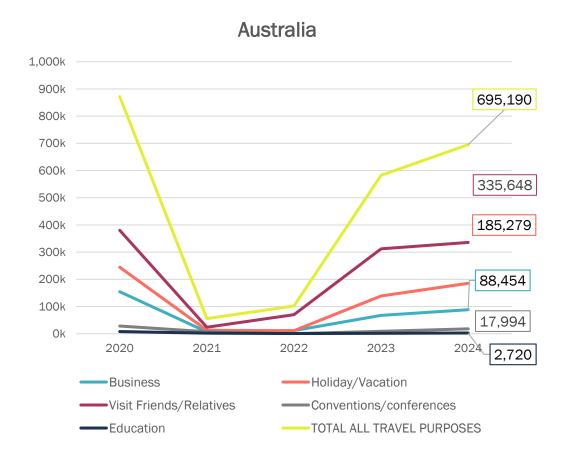


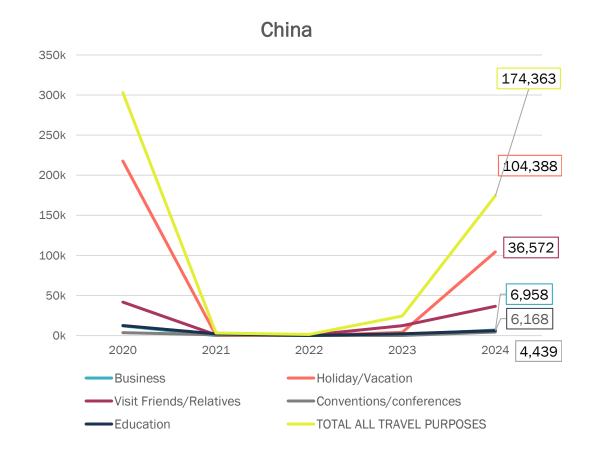




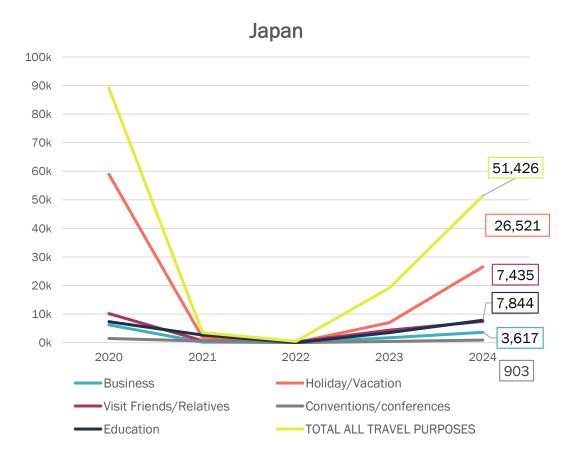


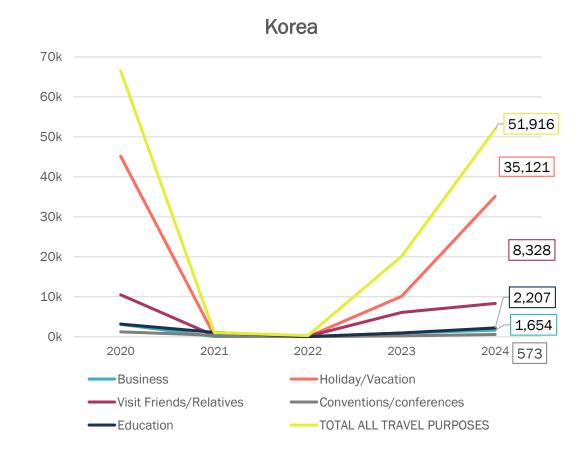




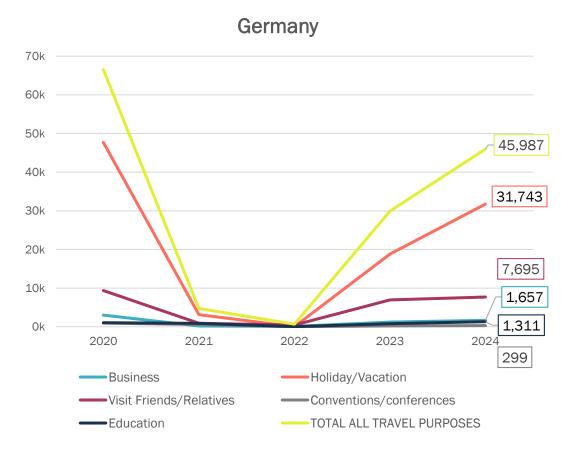


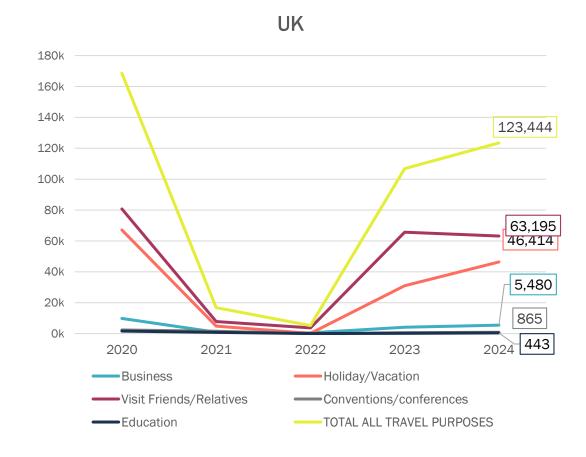




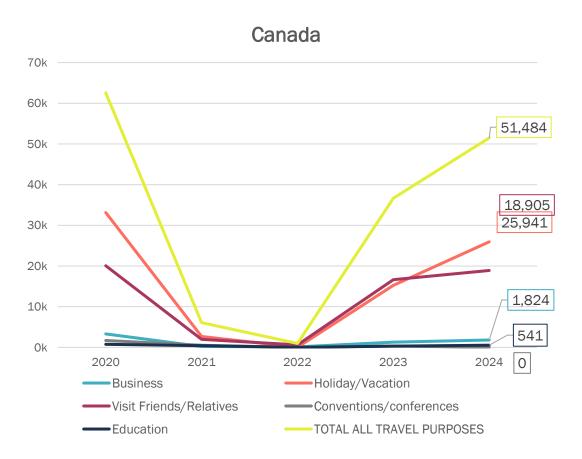


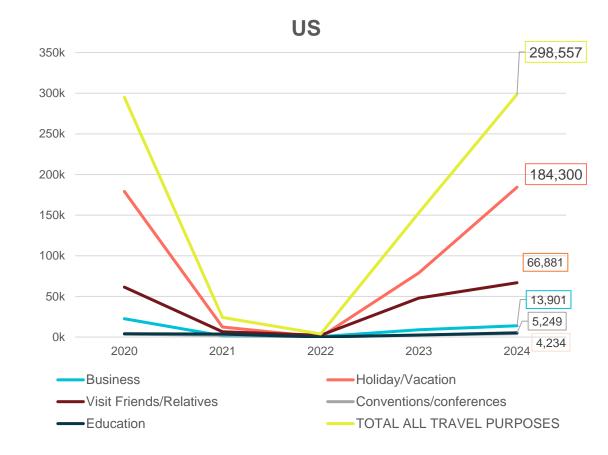












## Ngā mihi Thank you

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