

Tātaki
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Tāmaki Makaurau Auckland Destination Overview

July 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 August – September 2023
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Key Visitor Data




536.1^k

Domestic Visitors
July 2023 (Month)
-20.9% (to July 2022)




142.6^k

International Visitors
July 2023 (Month)
+84.4% (to July 2022)




590.3^k

Total Guest Nights
July 2023 (Month)
+32.7% (to July 2022)




\$207^m

Domestic Tourism Transactions
July 2023 (Month)
-4.2% (to July 2022)




\$76^m

International Tourism Transactions
July 2023 (Month)
+38.6% (to July 2022)




+21

Tourism Sentiment Score
July 2023 (Month)
+3 pts (to July 2022)



Key Visitor Data



DOMESTIC

- There were **536.1k domestic visitors** to Auckland in the month of July 2023, a decrease of **20.9%** compared to July 2022 (677.6k). This was up (4.1%) compared to pre-Covid numbers (515.0k in July 2019).
- The year to July 2022 saw **7.09m domestic visitors** to Auckland, up **15.3%** compared to last year.
- There were **395.6k domestic guest nights in commercial accommodation** for the month of July, up **13.6%**.
- Domestic tourism transactions** for the year to July 2023 were **\$2.55b**, up **38.7%** on last year and **\$207.1m for the month** (down **4.2%** compared to July 2022).
- For the month of July 2023, tourism spend was down across all domestic markets.
- Spend from **Waikato-based visitors \$48.7m** was down **6.0%** compared to the previous year.
- Spend from **Northland (\$22.7m, down 0.9%), the Bay of Plenty (\$17.4m, down 6.9%), Wellington (\$16.6m, down 5.4%) and Canterbury (\$15.1m, down 6.3%)** was also down in July 2023 compared to July 2022.

INTERNATIONAL

- FIFA Women's World Cup (WWC)** seems to have had an impact with total July arrivals up for the month and unseasonably strong visitor arrivals from key markets – particularly from the USA, which is also evident in the accommodation and spend data.
- Monthly international visitors (142.6k)** were up **84.4%** on July 2022 (77.3k) but numbers were down **16.0%** compared to July 2019 pre-Covid (169.7k).
- The year to July 2023 saw **1.78m international visitor arrivals**, an increase of **524.0%** on 2022. However, international visitation was down **35.4%** compared to pre-Covid levels (2.75m in YE July 2019).
- VFR visitors** contributed the most to annual visitor numbers (**709.8k**) and increased **343.7%** on the year to July 2022. **Monthly VFR numbers (44.8k)** were also up **20.2%** compared with July 2022.
- Holiday visitors (637.2k)** were up **1445.4%** for the year, with monthly numbers (**55.9k**) also up **211.9%**.
- 194.7k international guest nights in commercial accommodation** for July, up **101.1%** on last year.
- International tourism transactions** were **\$1.02b** for the year, up **217.0%** and **\$76.1m for the month**, up **38.6%**.
- Monthly spend from Australia (\$15.3m)** was down **18.9%**.

OVERALL

- For the month of July 2023, there were **590.3k total guest nights in commercial accommodation** in Auckland, up **32.7%** on last year.
- ADR peaked on Saturday 22nd July (when USA played Vietnam at Eden Park for the FIFA World Cup), while RevPAR peaked on Monday 24th July (when Italy played Argentina at Eden Park as part of FIFA).
- Looking forward, overall occupancy on the books is higher this year compared to the same period last year (i.e., from September 2023 to December 2023).
- In 2023 Q2 supply expanded 2.9%. Demand expanded 33.6%, resulting in an occupancy gain of 29.9%. Occupancy is expected to grow by 36.6% in 2023 Q3, with supply expanding 2.6% and demand expanding 40.3%.
- International visitor growth to New Zealand is forecast with a Compound Annual Growth Rate (CAGR) of 28.7% from 2022 to 2027, resulting in a possible 3.08m international visitors by YE July 2027.
- The **Tourism Sentiment Score** for Auckland for July 2022 was **+21 (2 points less than NZ), 3 points higher than July 2022**. **Spectator Sports** has for the first time been a positive driver in sentiment – another sign of the impact of **FIFA WWC 2023**.



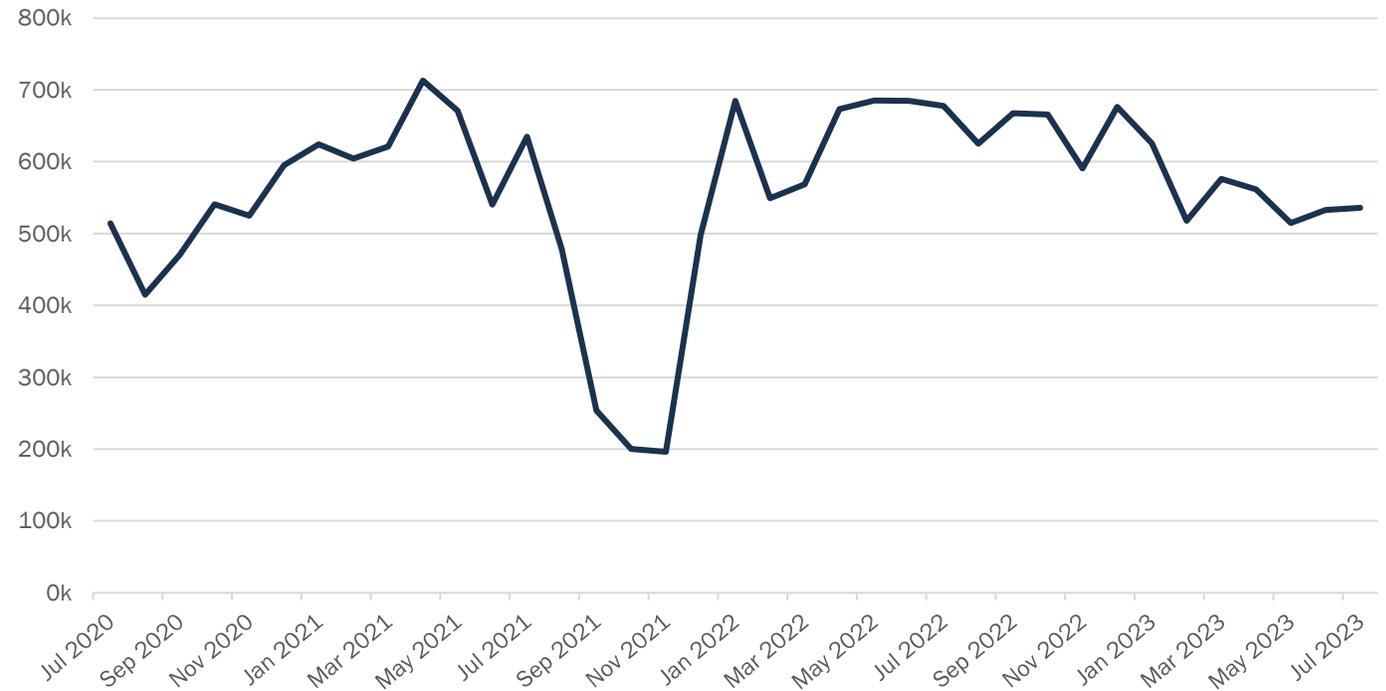
Auckland Tourism – Visitor Arrivals Data

7.09m Domestic visitors in YE July 2023, up 15.3%

- There were **536.1k domestic visitors** to Auckland in the month of **July 2023**, a decrease of **20.9%** compared to July 2022 (677.6k). This was up (4.1%) compared to pre-Covid numbers (515.0k in July 2019).
- **The year to July 2022 saw 7.09m domestic visitors** to Auckland, up **15.3%** compared to last year.
- Domestic visitor levels dropped from August to November 2021, which was when Auckland moved to Alert Level 4 – Lockdown of the COVID-19 Alert System. Domestic visitation increased significantly in December 2021 as the COVID-19 Alert System ended and all of New Zealand moved to the COVID-19 Protection Framework, also known as the traffic lights.

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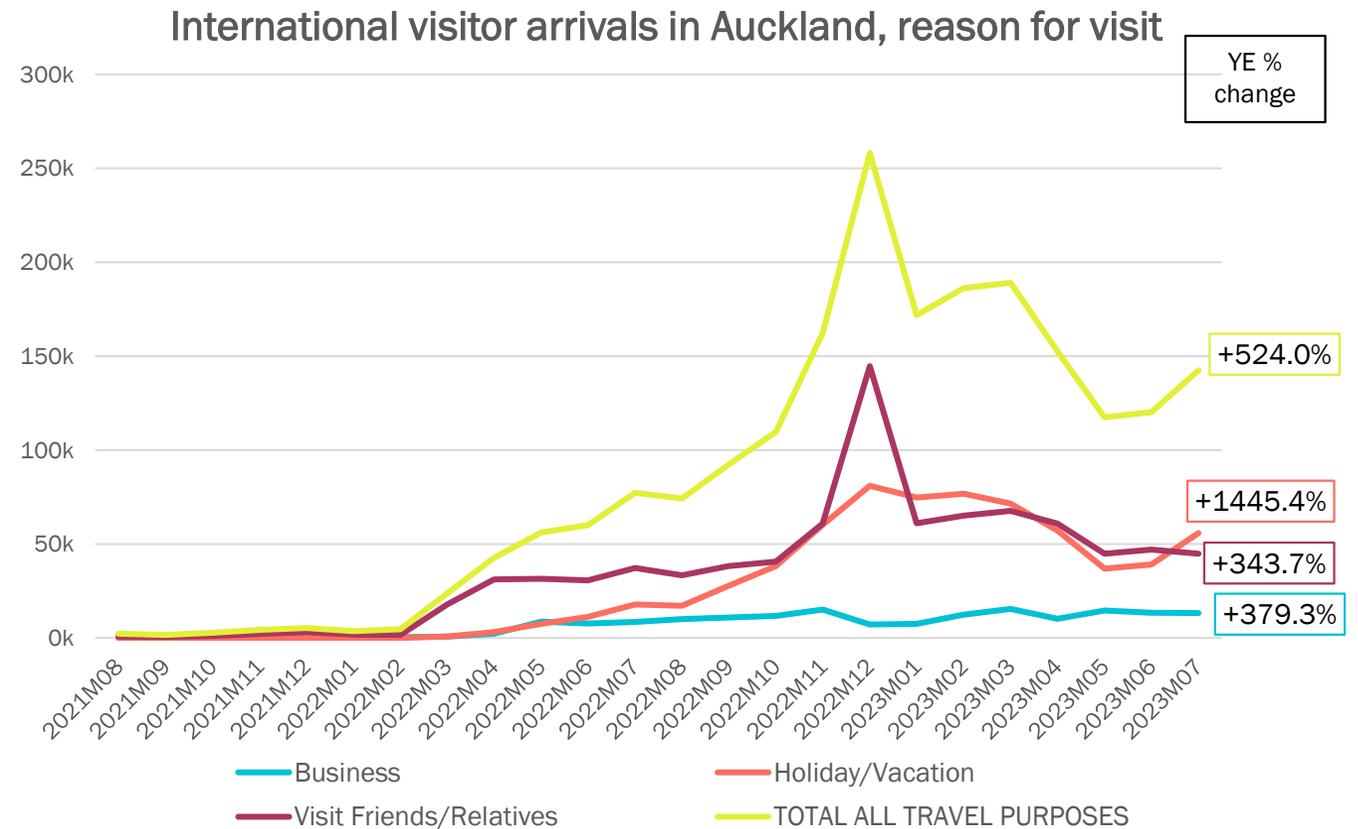
Domestic Visitor Population Estimates to Auckland



	Total Domestic Visitors	vs. previous year / YE	vs. pre-Covid / 2019
July 2022	536,067	-20.9%	4.1%
YE July 2022	7,091,061	15.3%	N/a

1.77m International visitor arrivals in the year to July 2023, up 524.0%

- The month of July saw **142.6k international visitors, up 84.4%** on July 2022 (77.3k) but down 16.0% compared to pre-Covid numbers (169.7k in July 2019). FIFA WWC seems to have had an impact with July arrivals up for holiday purposes.
- The year to July 2023 saw **1.78m international visitor arrivals, an increase of 524.0%** on the previous year. However, international visitation was down 35.4% compared to pre-Covid levels (2.75m in YE July 2019).
- **VFR visitors** contributed the most to annual visitor numbers (709.8k) and **increased 343.7%** on the year to July 2022. **Monthly VFR numbers (44.8k)** were **also up 20.2%** compared with the month of July 2022.
- **Holiday visitors (637.2k)** were **up 1445.4%** for the year, with **monthly numbers (55.9k)** also **up 211.9%**.
- There were **142.3k business visitors (up 379.3%)** in the year to July 2023, and **13.3k** for the month (up 56.1%).

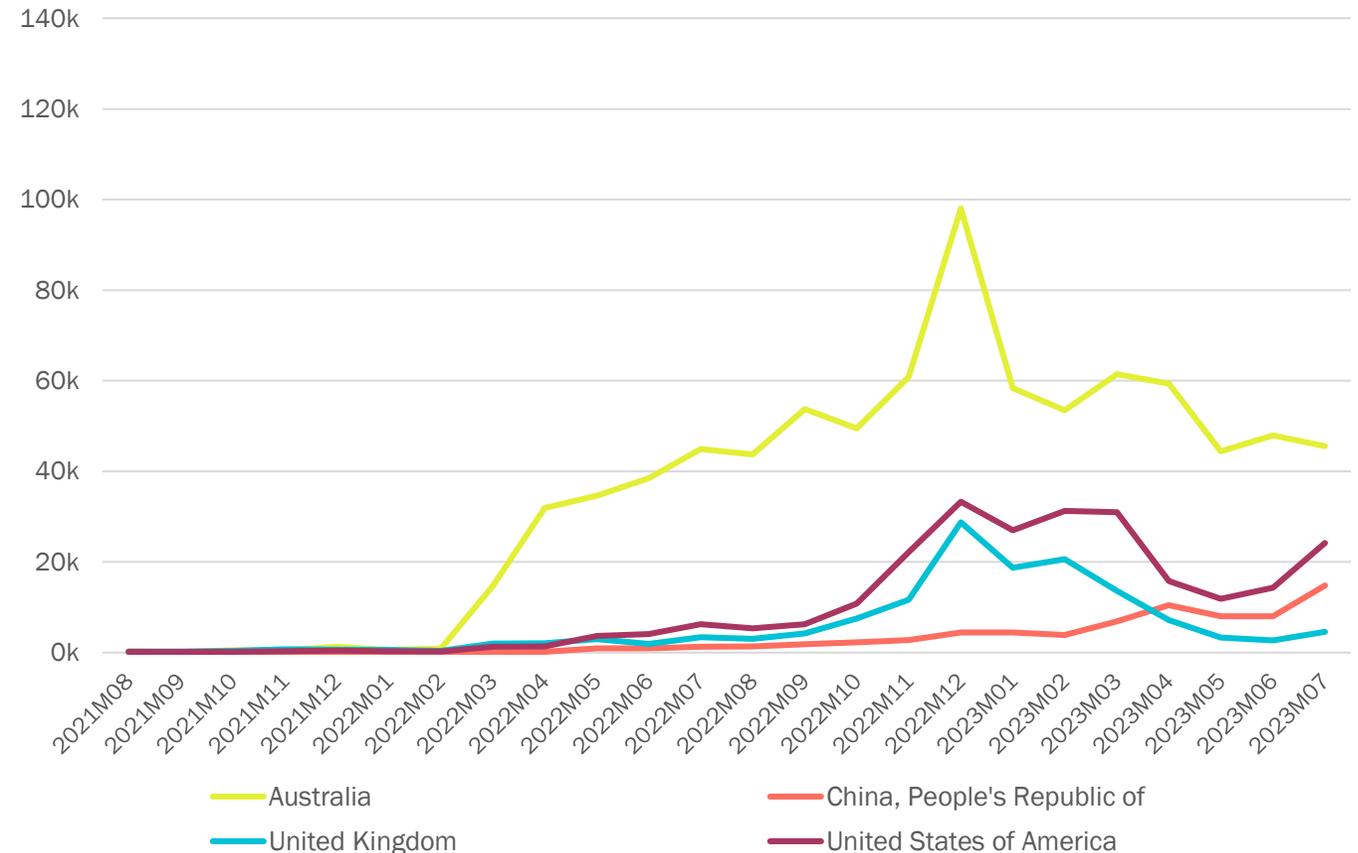


	Visitor arrivals	vs. previous year / YE	vs. pre-Covid / 2019
July 2023	142,625	84.4%	-16.0%
YE July 2023	1,777,700	524.0%	-35.4%

14.8k visitors from China in July 2023, up 1028.4%

- There was an increase in **Australian visitors** in the month of July 2023, with **45.5k visitors**, an increase of **1.3%** compared to last July. The year to July 2023 saw **676.5k** Australian visitor arrivals, up **300.7%**.
- FIFA WWC is likely to have had a positive impact with unseasonably strong visitor arrivals from key markets, particularly from the USA.
- The year to July 2023 saw **233.4k** visitors from the US (up **1169.1%**), with **24.2k** visitors for the month (up **287.9%**).
- For year to July 2023, there were **125.9k** visitor arrivals from the UK (up **714.0%**) and **4.6k** visitors for the month (up **36.8%**).
- Visitors from China (**69.2k**) were also up for the year (**1622.7%**), and up (**1028.4%**) for the month of July (**14.8k**).

Visitor arrivals in Auckland by key international markets



24-month visitor arrivals from individual markets

Australia



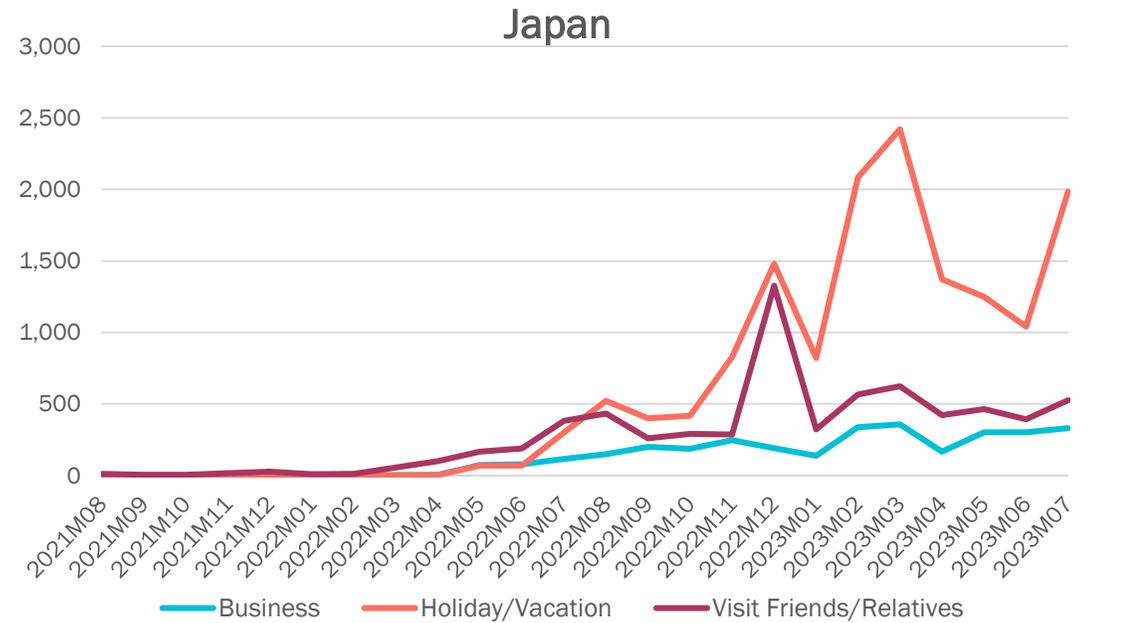
China



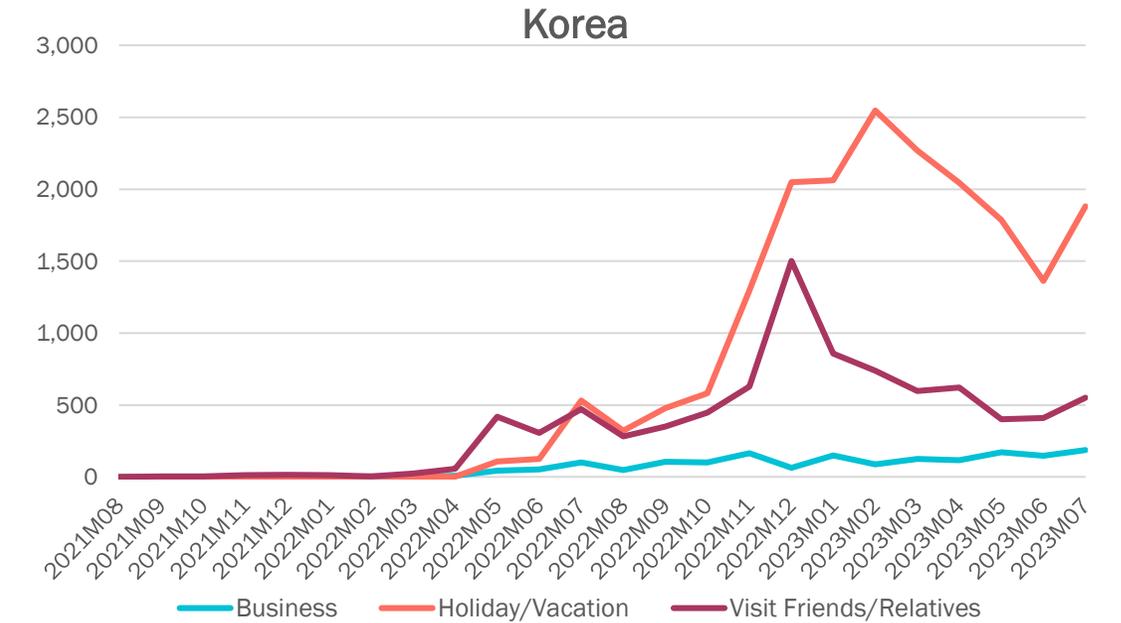
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	7,370	16.7%	11,421	21.7%	20,807	-12.9%	45,534	1.3%
YE July 2023	84,896	289.7%	180,059	658.2%	331,785	214.2%	676,487	300.7%

	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	614	765%	8,220	4763.9%	2,818	448.2%	14,838	1028.4%
YE July 2023	3,633	1613.7%	27,824	7804.5%	23,720	1067.3%	69,200	1622.7%

24-month visitor arrivals from individual markets



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	332	186.2%	1,986	559.8%	526	37.3%	4,516	210.8%
YE July 2023	2,912	890.5%	14,621	3163.6%	5,918	503.3%	33,340	1118.6%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	187	85.1%	1,882	254.4%	551	17.0%	3,271	142.7%
YE July 2023	1,475	573.5%	18,687	2305.0%	7,389	454.3%	32,663	1042.9%

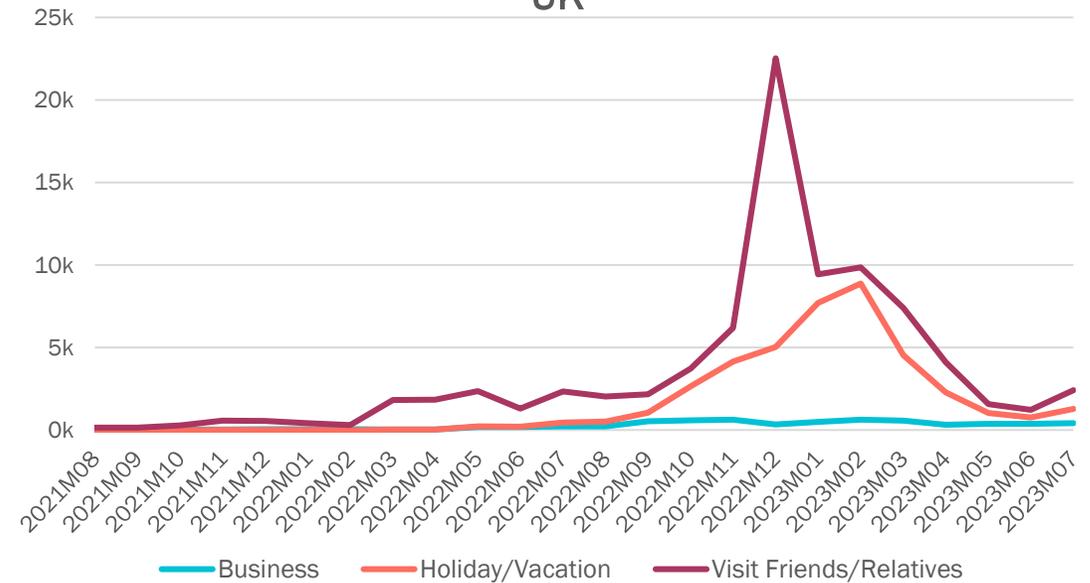
24-month visitor arrivals from individual markets

Germany



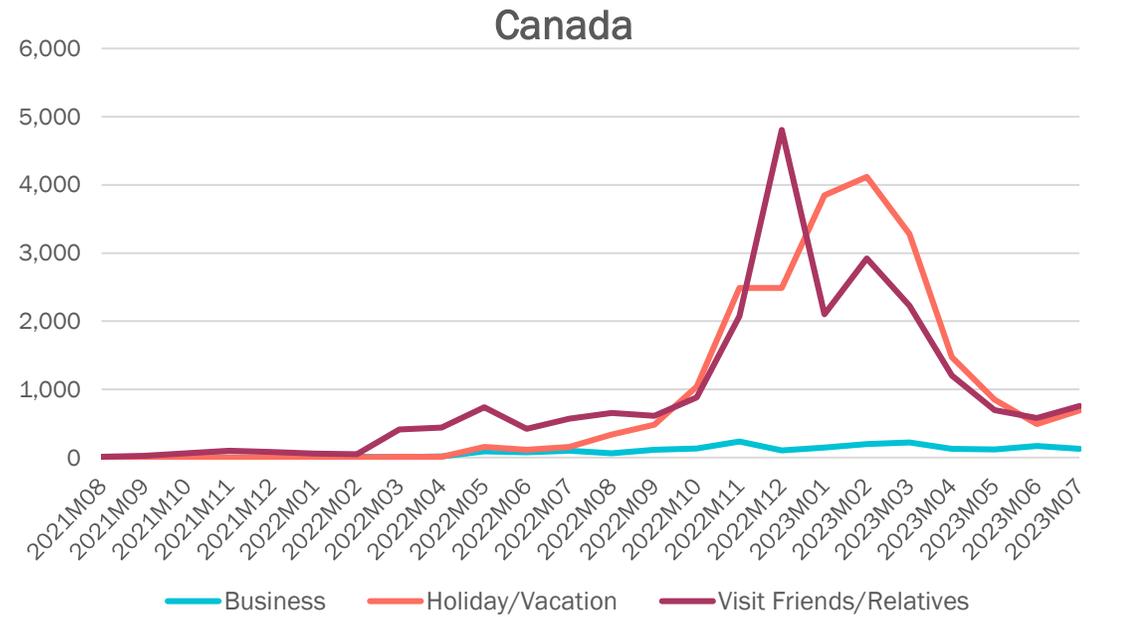
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	173	147.1%	771	270.7%	301	22.4%	1,719	154.7%
YE July 2023	1,657	560.2%	24,318	5118.5%	7,878	541.0%	37,866	1582.9%

UK

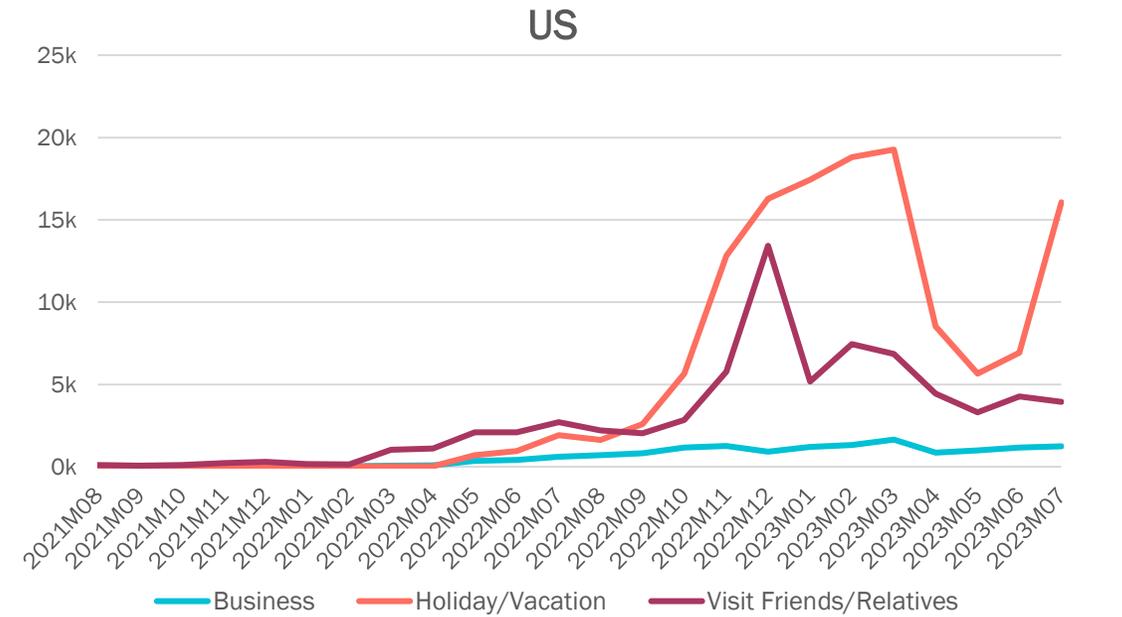


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	425	78.6%	1,286	176.6%	2,423	2.9%	4,607	36.8%
YE July 2023	5,559	473.1%	39,931	3645.9%	72,682	497.7%	125,949	714.0%

24-month visitor arrivals from individual markets



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	128	29.3%	691	345.8%	755	32.0%	1,835	96.3%
YE July 2023	1,772	389.5%	21,582	4491.9%	19,516	553.1%	47,622	1012.1%



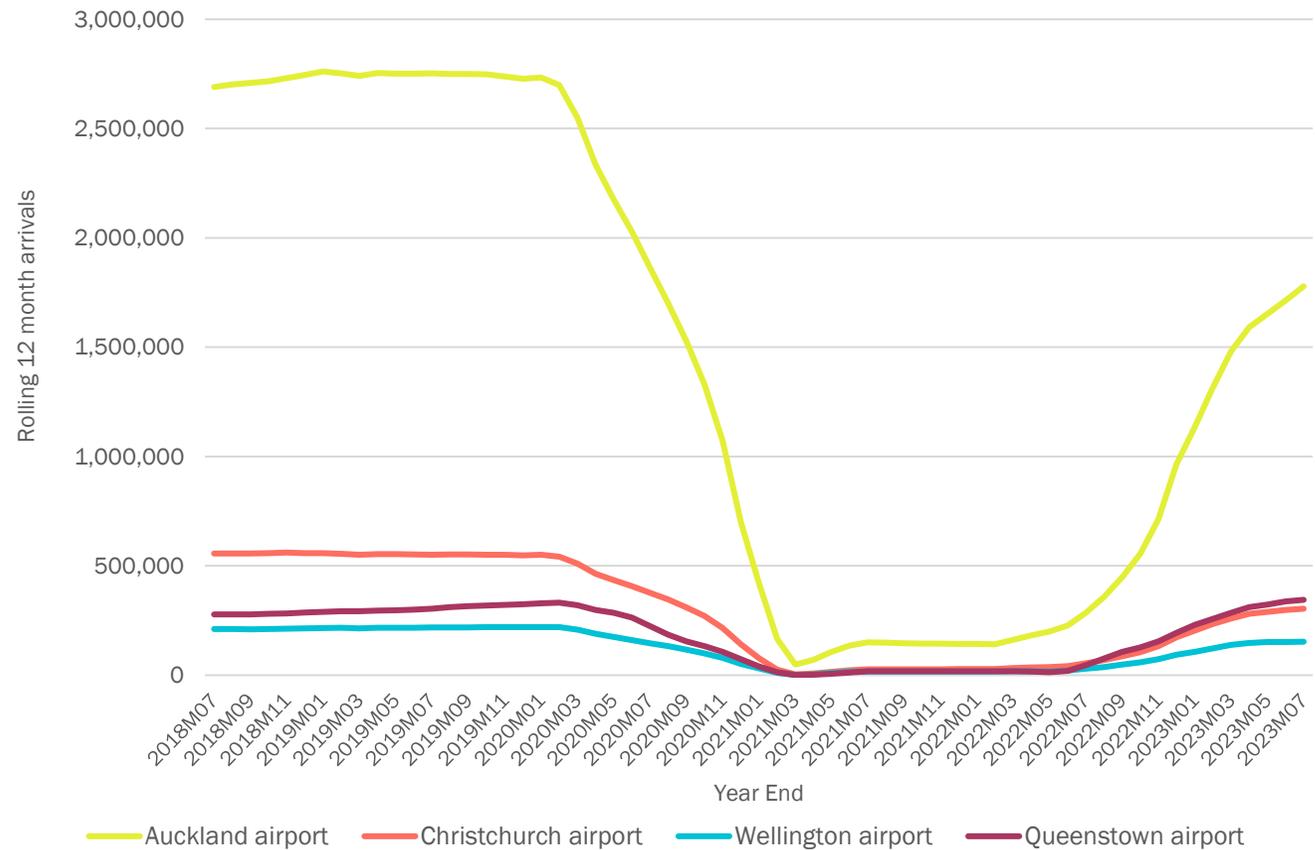
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2023	1,253	103.1%	16,068	732.5%	3,945	45.7%	24,174	287.9%
YE July 2023	13,351	663.8%	131,702	3450.9%	61,729	509.4%	233,433	1169.1%

Auckland has seen a 524.0% 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 524.0% increase in international visitor arrivals over the last year.
- For the year ending July 2023, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 668.8%, Christchurch was up 465.5% and Wellington was up 434.7% compared to last year.

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12 month rolling visitor arrivals



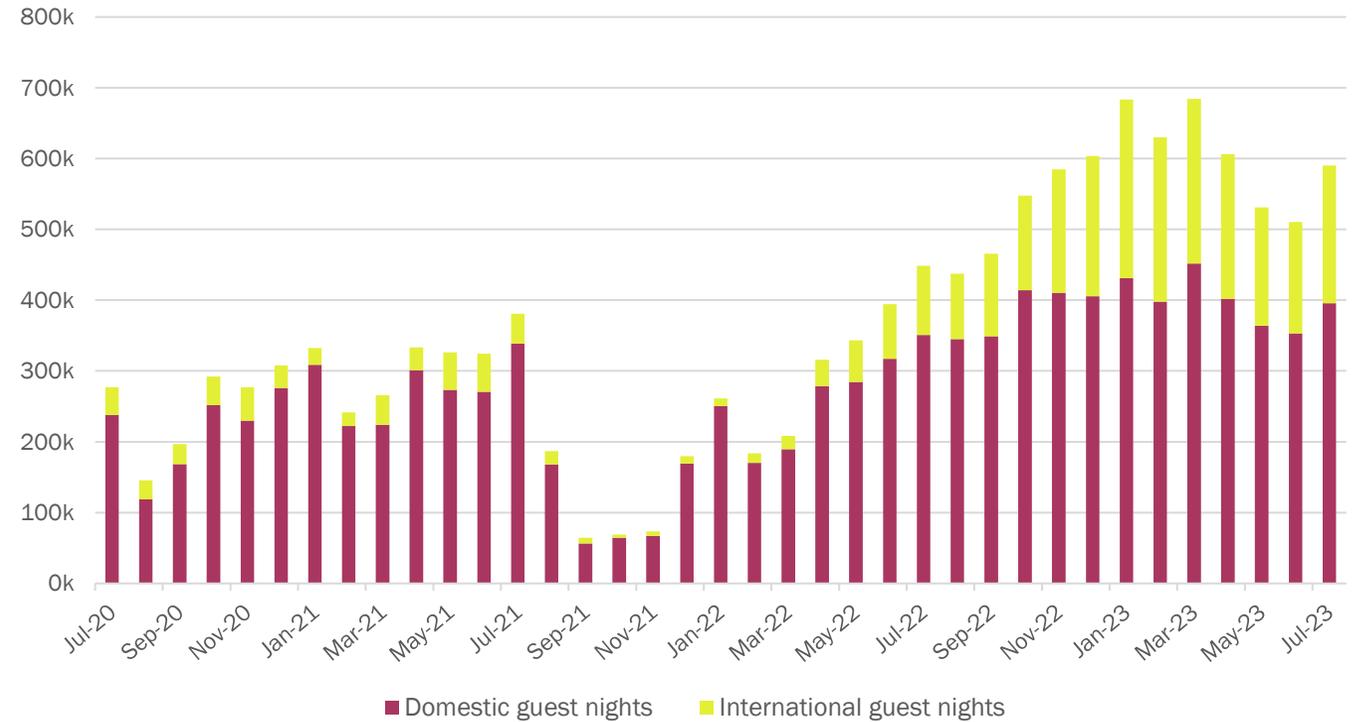


Auckland Tourism – Accommodation Data

590.3k total guest nights in commercial accommodation in July 2023, up 32.7%

- For the month of July 2023, there were **590.3k total guest nights** in commercial accommodation in Auckland, up 32.7% on the same month last year and another sign of the positive impact of FIFA WWC.
- There were **395.6k domestic guest nights** in commercial accommodation (up 13.6%), and **194.7k international guest nights (up 101.1%)** in commercial accommodation in July 2023.
- For New Zealand overall, there were 2.81m guest nights in commercial accommodation in July 2023, up 11.0% compared to July 2022.

Guest nights in commercial accommodation - Auckland



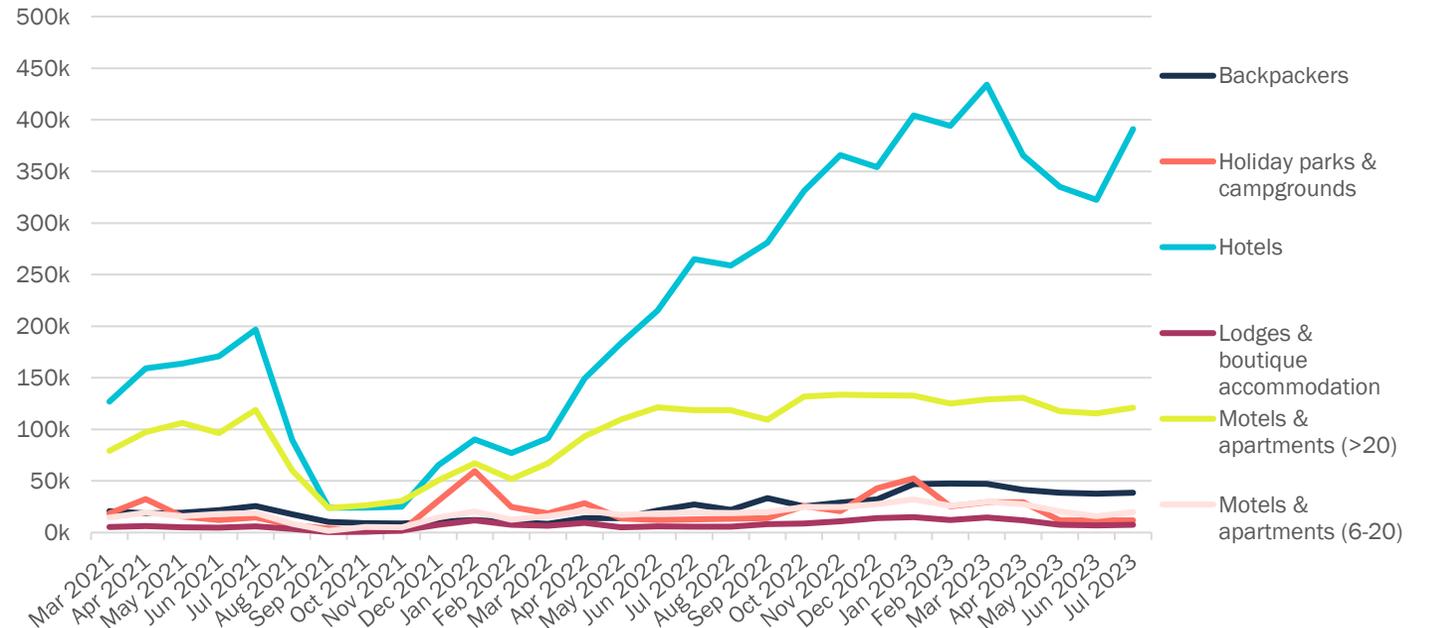
July 2023	Auckland	% change	New Zealand	% change
Total guest nights	590,300	32.7%	2,805,100	11.0%
Domestic guest nights	395,600	13.6%	2,005,700	-4.1%
International guest nights	194,700	101.1%	799,300	83.4%

391.2k guest nights in hotels in July 2023, up 47.6%

- For the month of July 2023, there were 391.2k guest nights in hotels in Auckland, up 47.6% compared to July last year.
- Guest nights in backpacker accommodation (up 41.8% to 38.7k) and lodges and boutique accommodation (up 35.7% to 7.6k) also increased.
- There were 121.0k guest nights in motels and apartments (>20) (up 2.1%), and 19.8k guest nights in motels and apartments (6-20) (up 2.1%) in July 2023.
- Guest nights in holiday parks and campgrounds (12.0k) were down (6.3%) for the month of July.

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Guest nights by accommodation type (monthly)

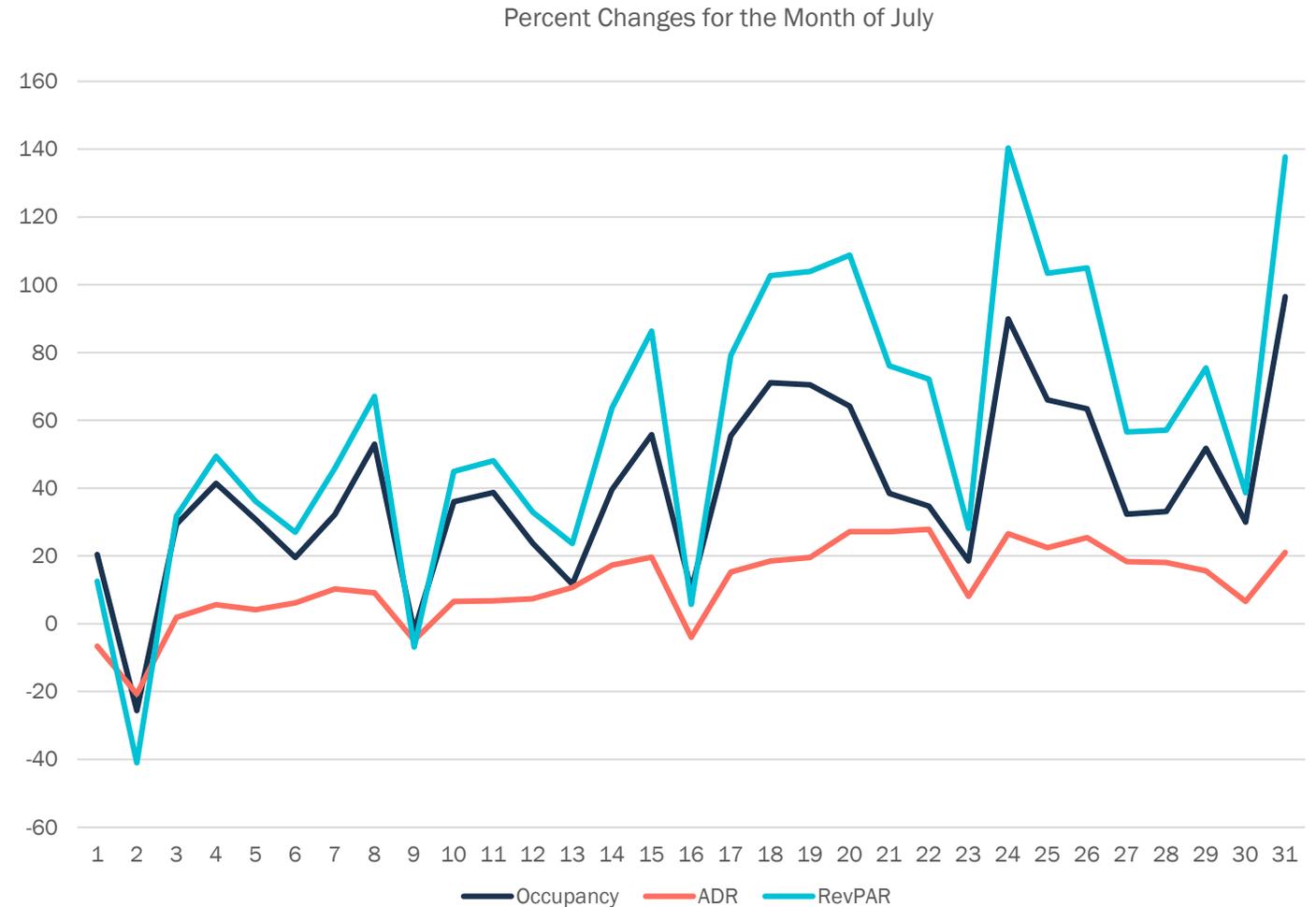


July 2023	Guest nights	% change
Hotels	391,200	47.6%
Motels & apartments (>20)	121,000	2.1%
Motels & apartments (6-20)	19,800	2.1%
Backpackers	38,700	41.8%
Holiday parks & campgrounds	12,000	-6.3%
Lodges & boutique accommodation	7,600	35.7%

Occupancy was 35.7% higher in July 2023, compared to 2022

- **Occupancy was 37.5% higher** during the month of July 2023, compared to July 2022.
- **Revenue per available room (RevPAR) was 53.8% higher** in July 2023 compared to last year.
- **Average Daily Rate (ADR) was also up (11.4%)** on last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in July 2023. ADR peaked on Saturday 22nd July (when USA played Vietnam at Eden Park for the FIFA World Cup), while RevPAR peaked on Monday 24th July (when Italy played Argentina at Eden Park as part of FIFA) and Occupancy peaked on Monday 31st July 2023.
- A quarter (26%) of the hotels covered here were isolation hotels this time last year.

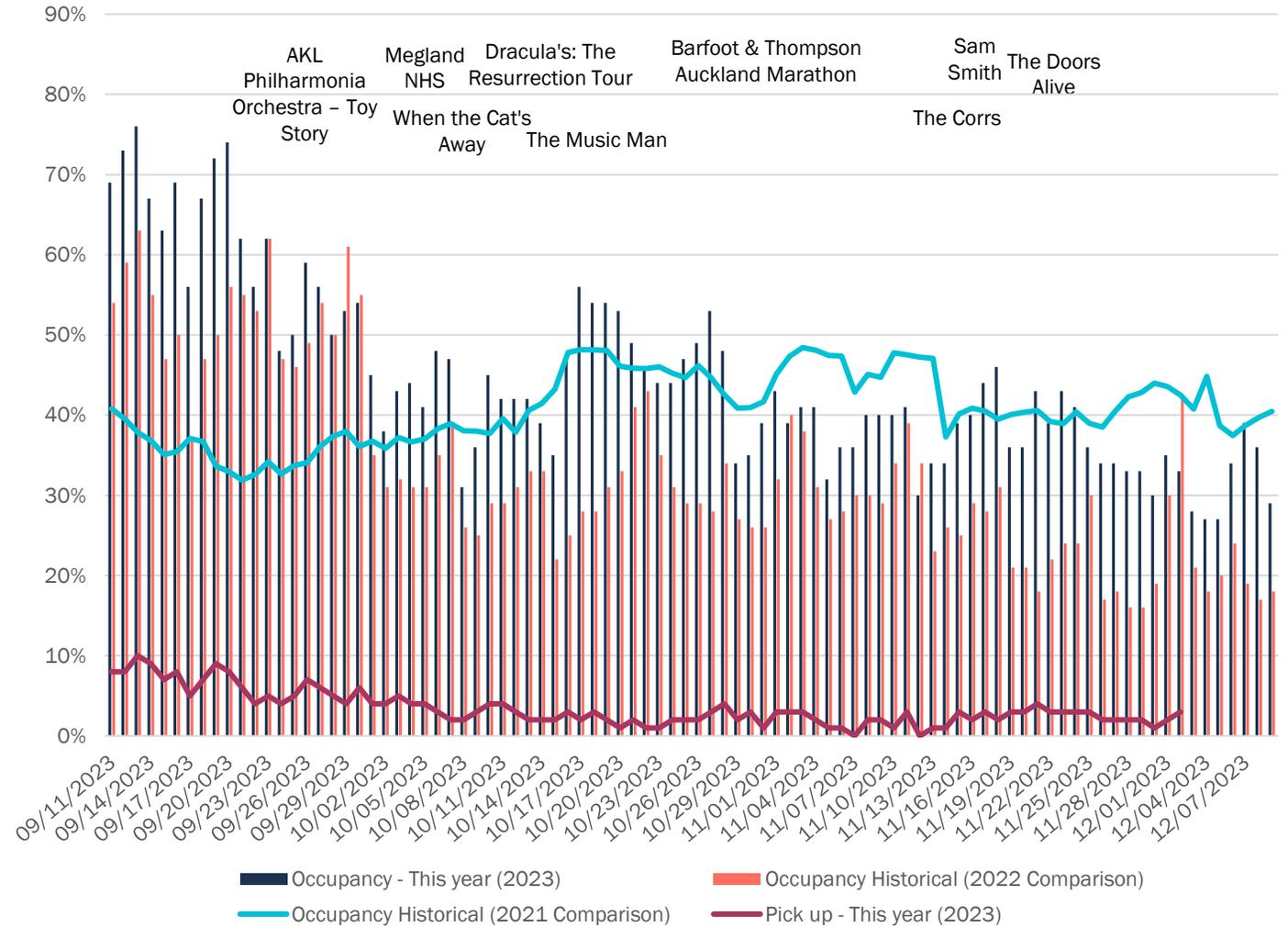
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90 Day Forward Booking Occupancy Data

- Looking forward, overall occupancy on the books is relatively higher for the period from September to December 2023 (compared to the same period in 2022).
- Auckland occupancy peaks at 76% on Wednesday 13th September 2023.
- Occupancy reaches 74% on Wednesday 20th September 2023.

Occupancy - 90 Day Forward Outlook



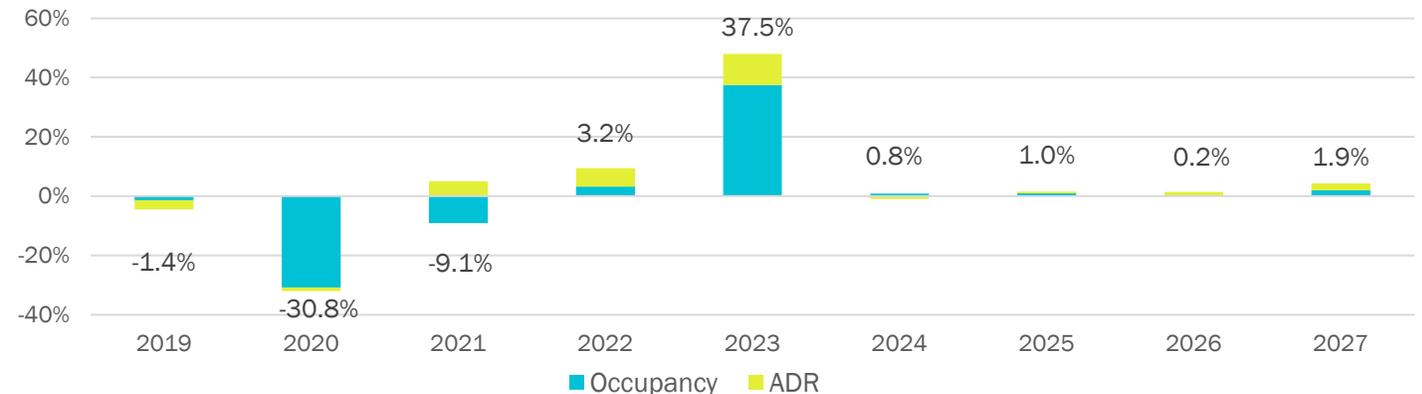
Longer term projections

- 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.
- The post-covid recovery is set to gain traction with strong growth in demand in 2023 which will then normalise in the following years with continued growth until 2027.
- In 2023 Q2 supply expanded 2.9%. Demand expanded 33.6%, resulting in an occupancy gain of 29.9%. Occupancy is expected to grow by 36.6% in 2023 Q3, with supply expanding 2.6% and demand expanding 40.3%.
- After expanding 3.2% in 2022, occupancy is expected to expand 37.5% in 2023. ADR is expected to increase 10.4%, resulting in RevPAR growth of 51.9% in 2023. RevPAR is expected to decline by -0.2% in 2024.
- Over the next three years, occupancy is expected to expand at an average annual rate of 11.9%, while ADR is expected to expand at an average annual rate of 3.2%.

Supply and Demand Growth



Occupancy Growth Composition

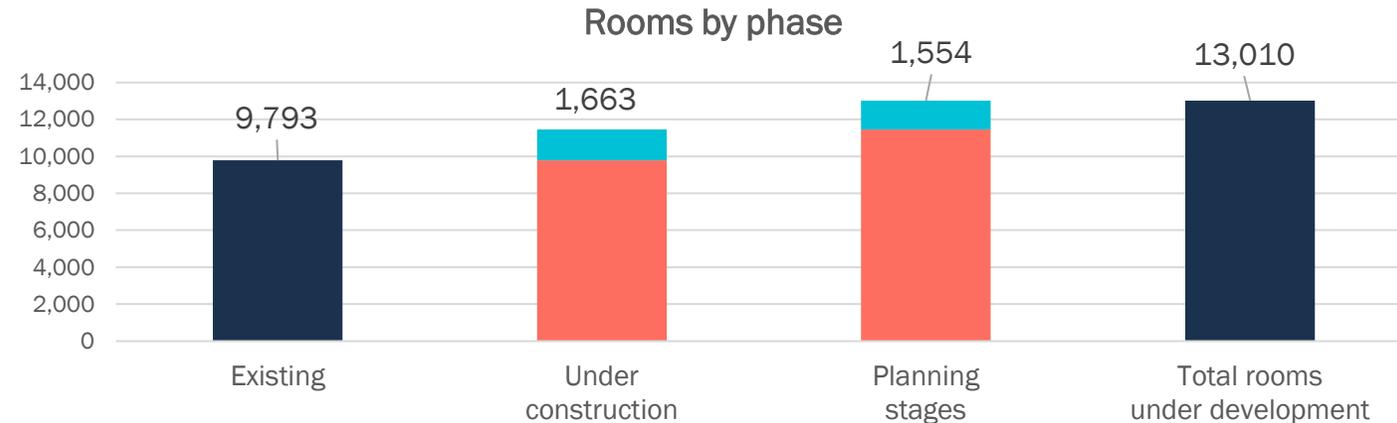


15.8k rooms available in 2023 and 13.0k rooms under development

- 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 3.0%, supplying an additional 458 rooms (compared to 2022).
- Looking to 2024, average room supply is expected to expand 4.4%, supplying 697 new rooms and bringing the total number of rooms to 16.5k.
- Observing rooms by phase data, there are 172 properties in the pipeline with a total of 13,010 rooms under development.
- 154 properties (with a total of 9,793 rooms) are under existing development. Ten properties (with 1,663 rooms) are currently under construction, and eight properties (with 1,554 rooms) are in the planning stages.

Average Supply
(Avg. daily rooms during year)

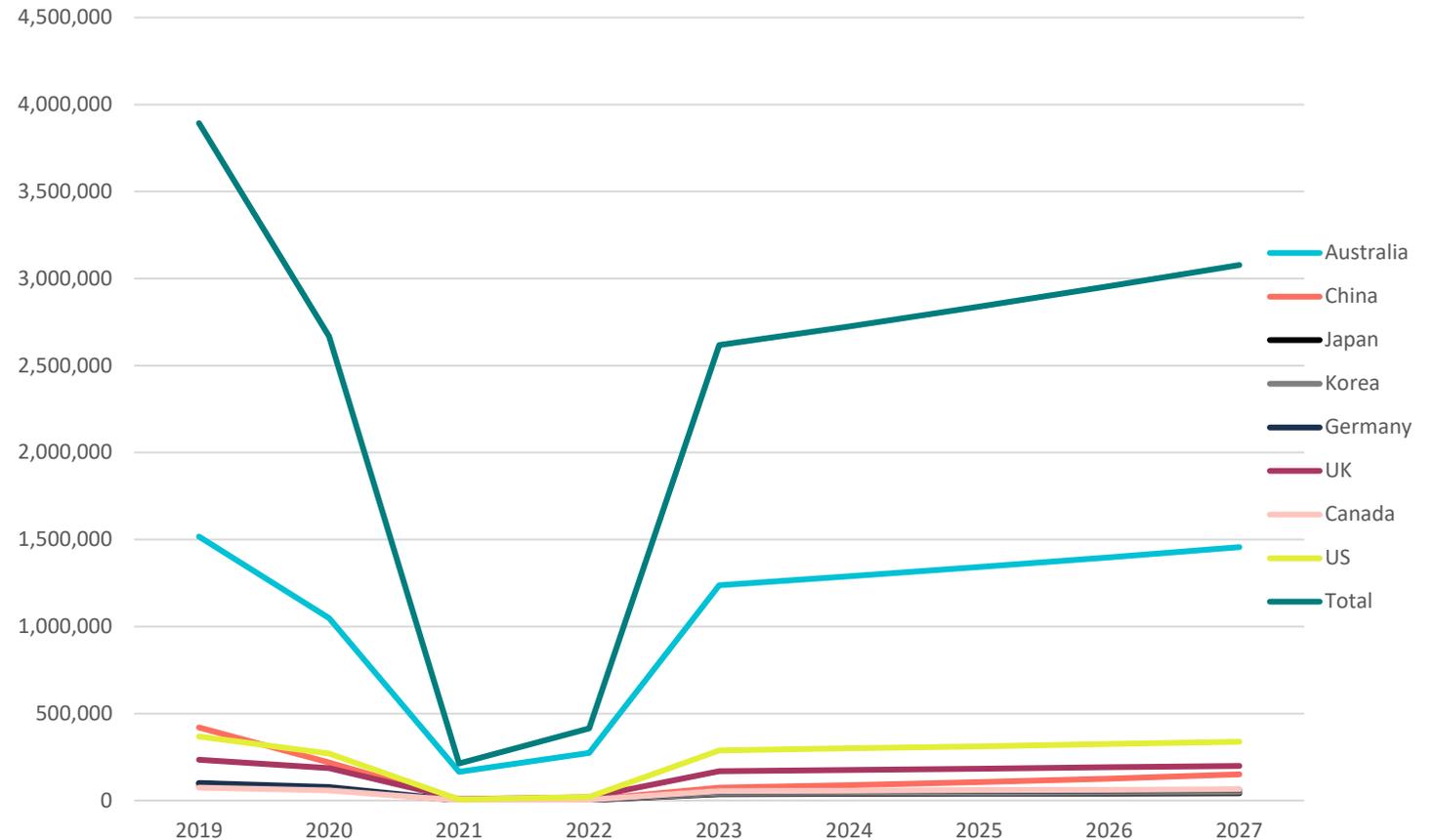
	Year	Rooms	% Chg.	Chg.
Actual	2019	13,785	2.7%	359
	2020	14,161	2.7%	376
	2021	14,920	5.4%	759
	2022	15,327	2.7%	407
Forecast	2023	15,785	3.0%	458
	2024	16,481	4.4%	697
	2025	17,011	3.2%	530
	2026	17,262	1.5%	251
	2027	17,419	0.9%	157



In total, 3.08m visitors are projected to visit New Zealand in YE July 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 28.7% from 2022 to 2027, resulting in a possible 3.08m international visitors by YE July 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 4.1%. 1.29m Australian visitors are expected to visit New Zealand in the year to July 2024 (bringing visitation close to pre-Covid levels of 1.52m 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.

Average Length of Stay Update

- At present, we cannot display current average length of stay data from the International Visitor Survey (IVS) as the survey has been put on hold by the New Zealand Government, due to low numbers of international visitors.
- Average length of stay results for international visitor arrivals will be reported again once the IVS has been restarted, which is expected to be once the borders reopen.
- Once an alternative dataset becomes available, we will commence reporting on this.

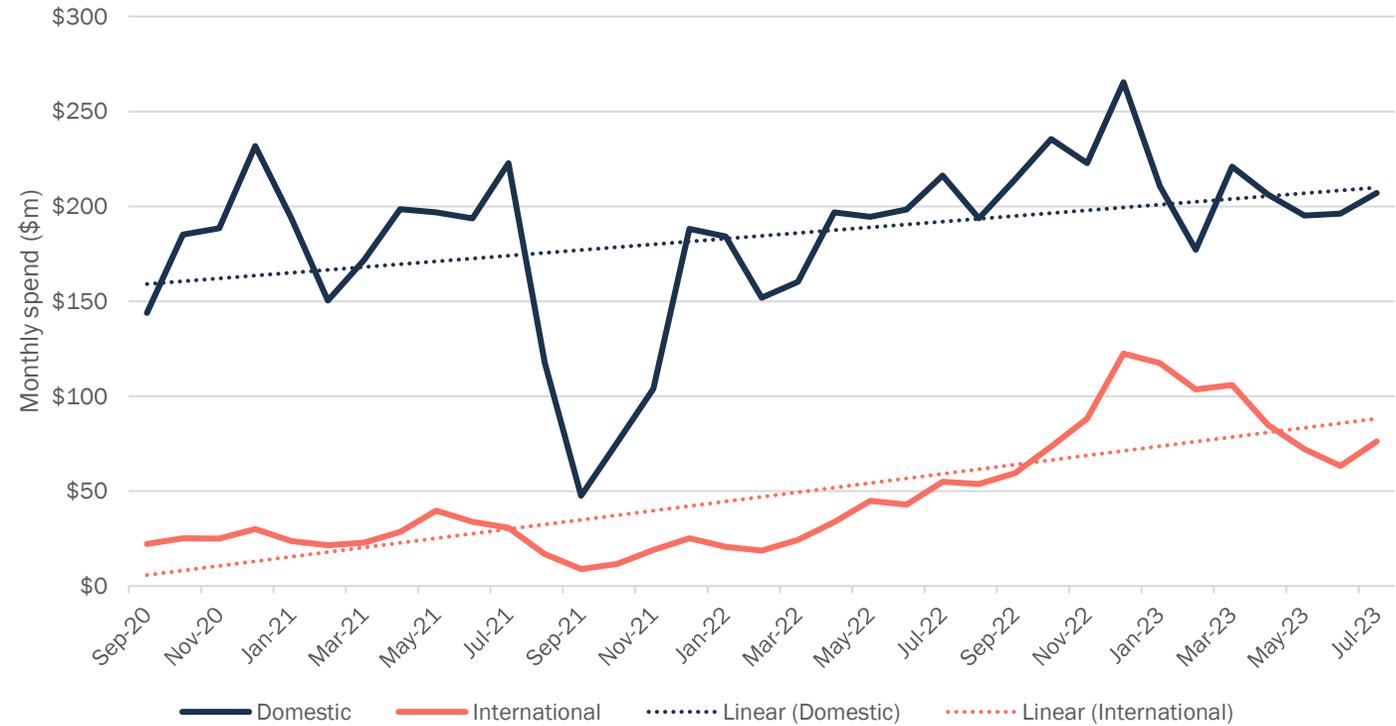


Auckland Tourism – Spend Data

\$2.55b in Domestic tourism transactions for year-end July 2023, up 38.7%

- In the year to July 2023, Domestic tourism transactions were **\$2.55b (up 38.7%)**, while International tourism transactions were **\$1.02b, up 217.0%** for the year.
- Looking at the last 24 months, domestic tourism transactions fell in correlation with Auckland’s regional lockdowns i.e., in February 2021 and August through to October in 2021.
- The Tourism Electronic Card Transactions (TECTs) are an interim replacement to Monthly Regional Tourism Estimates (MRTEs) that provide insights into monthly tourism spend and were introduced in November 2020. TECTs include only tourism-related electronic card transactions (ECT) paid through EFTPOS machines. More info can be found [here](#).

Year-end tourism transactions in Auckland

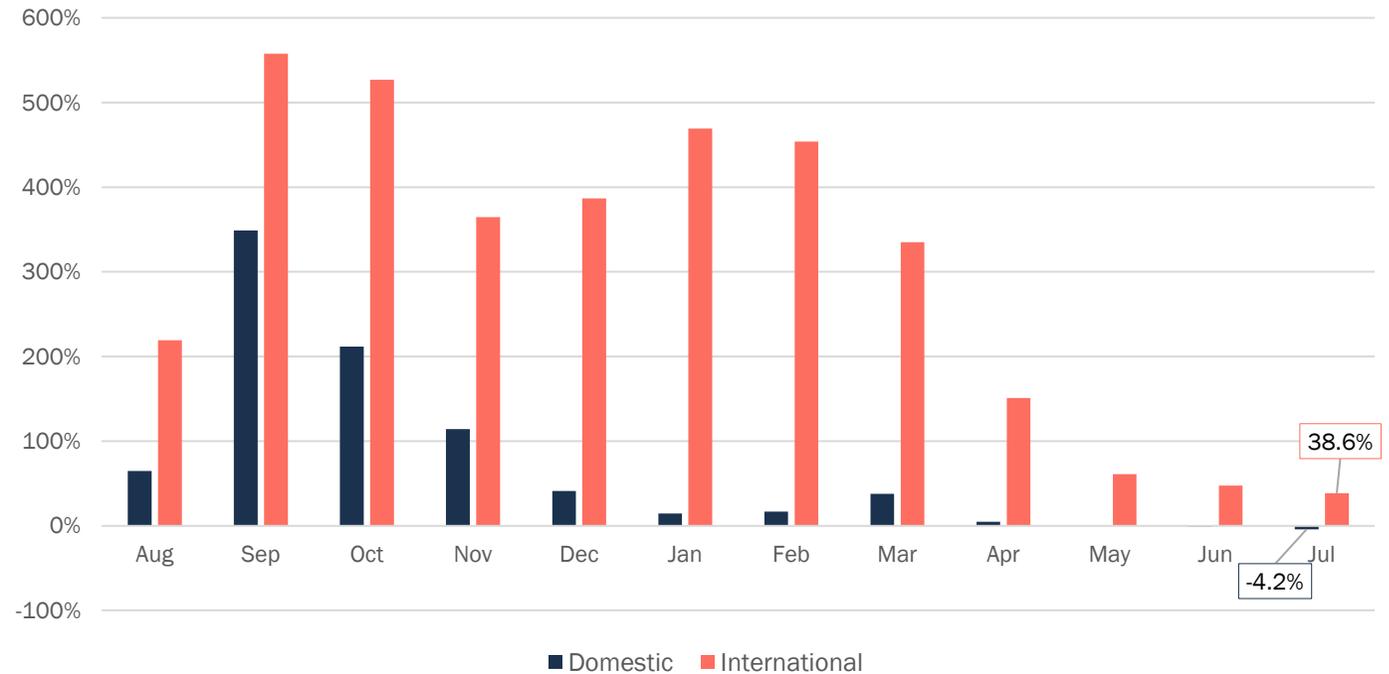


Tourism Transactions	YE July 2023 (\$b)	% change
Domestic	2.545	38.7%
International	1.021	217.0%

International tourism transactions were \$76.1m for July 2023, up 38.6%

- For the month of July 2023, domestic tourism transactions (TECTs) were \$207.1m (down 4.2%) compared to the same month in 2022.
- International tourism transactions in July 2023 were \$76.1m (up 38.6%) compared to July 2022.

Monthly % Change in tourism transactions in Auckland

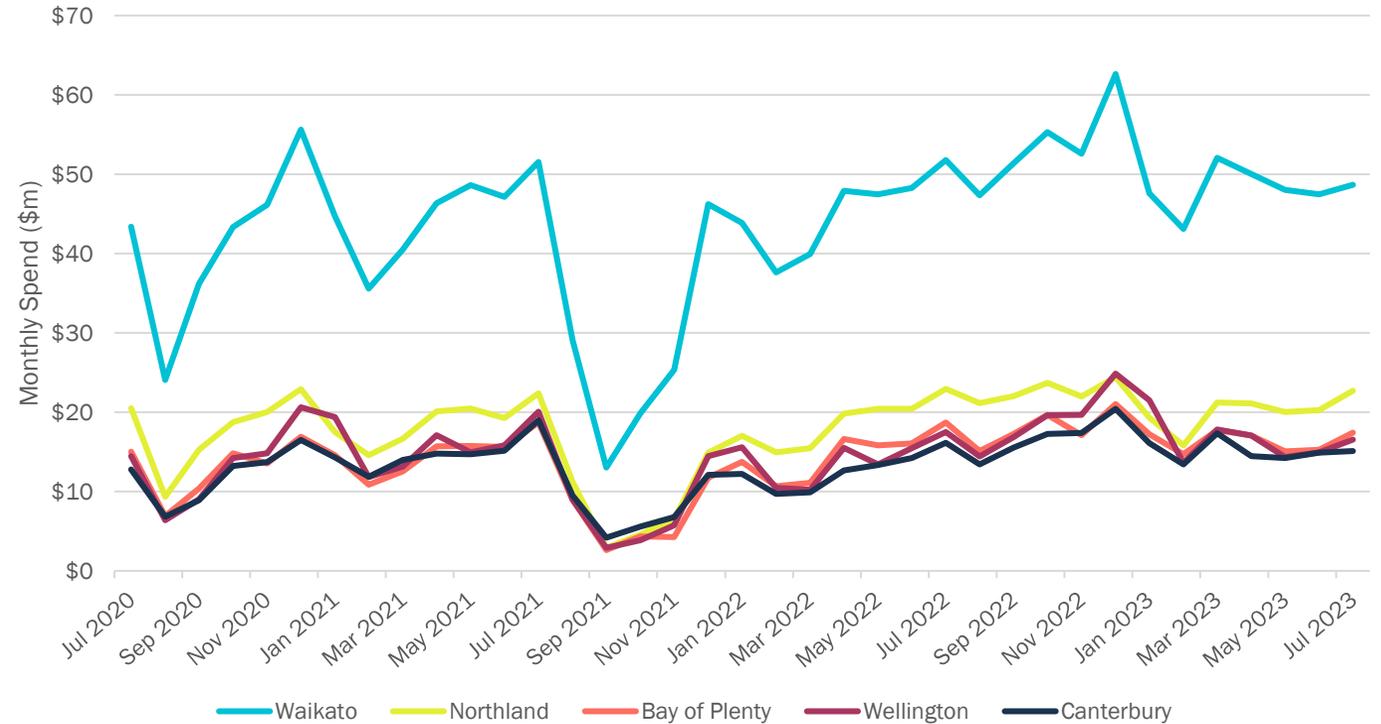


Tourism Transactions	July 2023 (\$m)	% change
Domestic	207.1	-4.2%
International	76.1	38.6%

Waikato visitors spent \$48.7m in July 2023, down 6.0% on the previous year

- For the month of July 2023, tourism spend was down across all domestic markets.
- Spend from **Waikato-based visitors \$48.7m** was down 6.0% compared to the previous year.
- Spend from **Northland (\$22.7m, down 0.9%)**, the **Bay of Plenty (\$17.4m, down 6.9%)**, **Wellington (\$16.6m, down 5.4%)** and **Canterbury (\$15.1m, down 6.3%)** was also down in July 2023 compared to July 2022.

Monthly tourism domestic spend in Auckland, by market

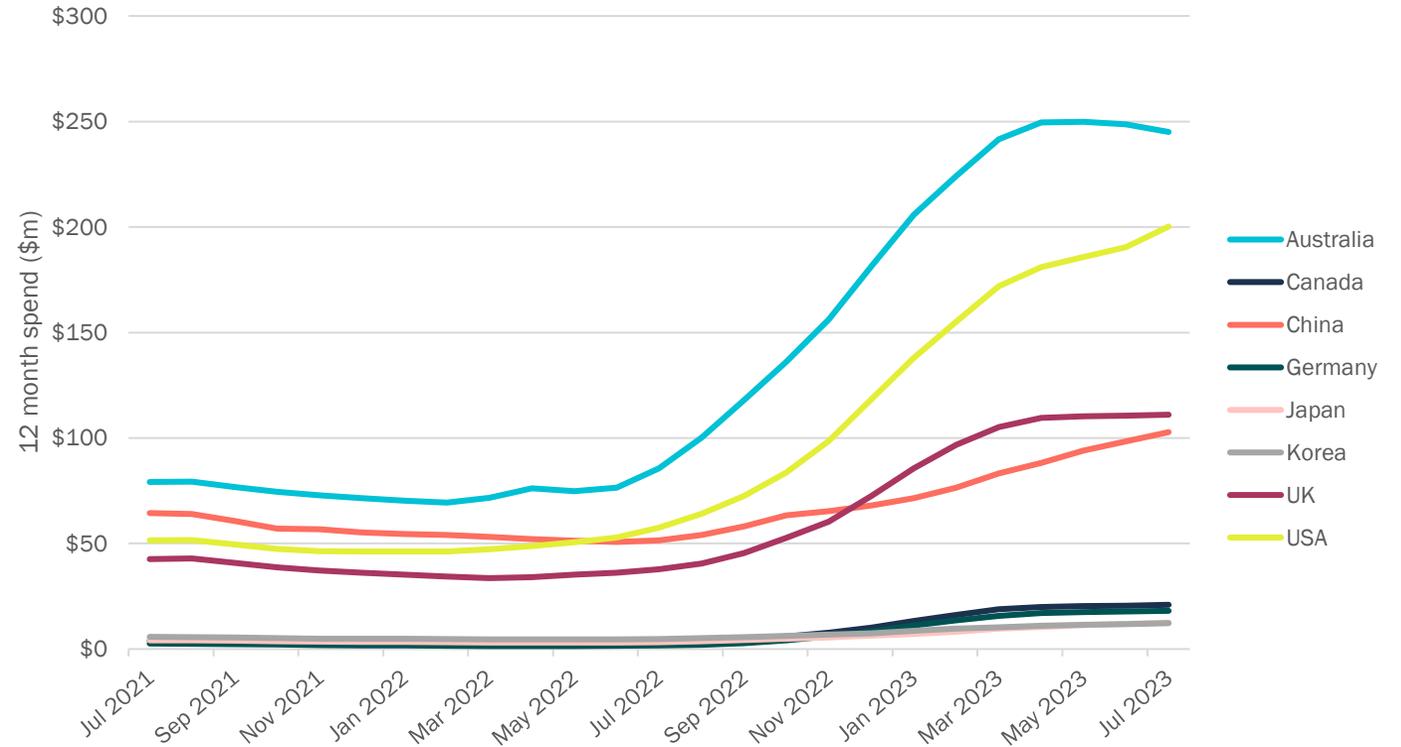


	Waikato	vs. previous year	Northland	vs. previous year	Bay of Plenty	vs. previous year	Wellington	vs. previous year	Canterbury	vs. previous year
July 2023	48.7	-6.0%	22.7	-0.9%	17.4	-6.9%	16.6	-5.4%	15.1	-6.3%

Australian visitors spent \$245m in the year to July 2023, up 186.1% on the previous year

- In the year to July 2023, Australian tourism spend was up 186.1% on the previous year to \$245m.
- Tourism spend from the US (up 248.6% to 200m) and the UK (up 193.9% to \$111m) was up for the year to July 2023.
- Chinese visitors spent \$103m in the year to July 2023, up 99.9% on the previous year.
- Spend from Germany (up 1007.3% to \$18m), Canada (up 418.3% to \$20.9m), Japan (up 292.8% to \$12.6m) and Korea was also up (155.8% to \$12.3m) on the previous year.

Year-end tourism international spend in Auckland, by market

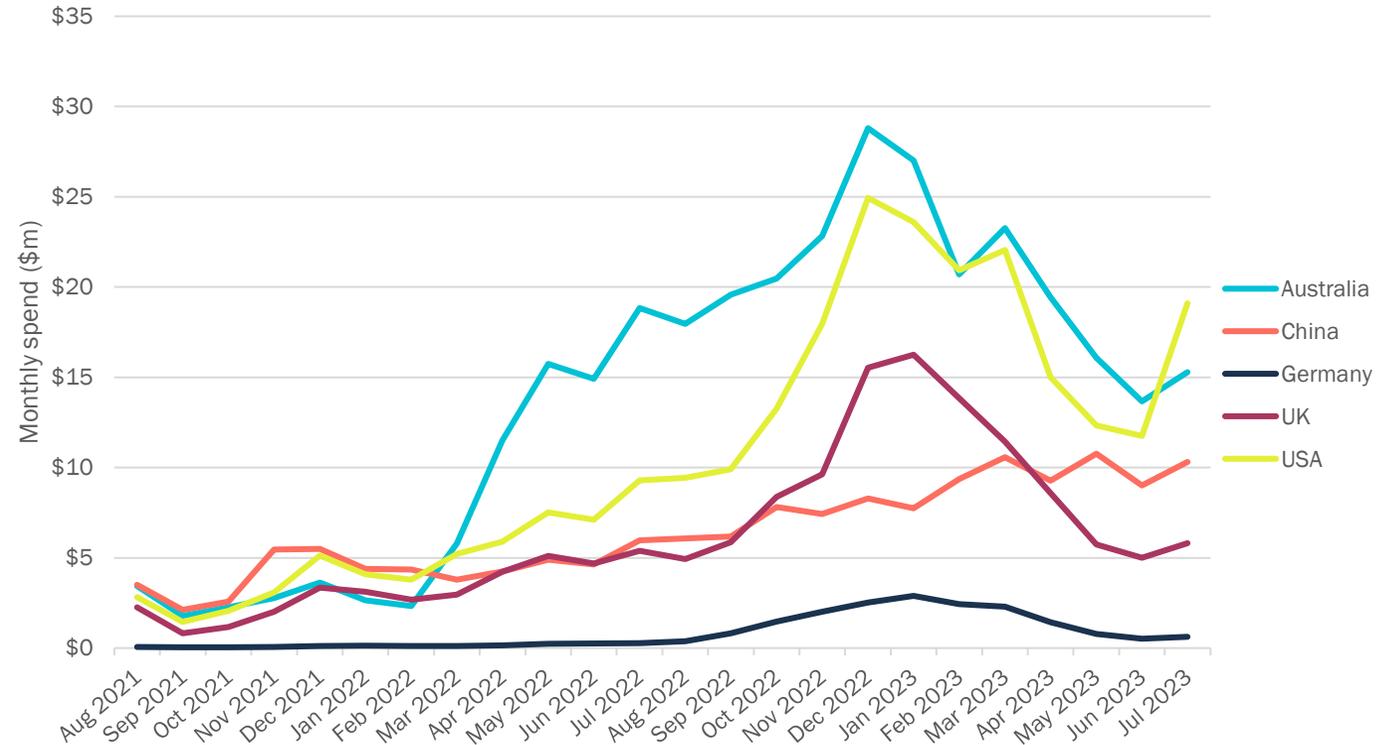


	Australia (\$m)	vs. previous year	China (\$m)	vs. previous year	UK (\$m)	vs. previous year	US (\$m)	vs. previous year	Germany (\$m)	vs. previous year
YE July 2023	245	186.1%	103	99.9%	111	193.9%	200	248.6%	18	1007.3%

Visitors from the US spent \$19.1m in July 2023, up 105.7% on the previous year

- For the month of July 2023, tourism spend from Australia (\$15.3m) was down 18.9% compared to last July.
- Visitors from the US spent \$19.1m in July, up 105.7% on the previous year.
- Visitors from China spent \$10.3m in July, up 72.6% compared to last year.
- There were also increases in tourism spend from the UK (up 7.9% to \$5.8m) and German (up 124.6% to \$0.6m) markets for the month of July 2023.

Monthly tourism expenditure in Auckland, by market



	Australia (\$m)	vs. previous year	China (\$m)	vs. previous year	UK (\$m)	vs. previous year	US (\$m)	vs. previous year	Germany (\$m)	vs. previous year
July 2023	15.3	-18.9%	10.3	72.6%	5.8	7.9%	19.1	105.7%	0.6	124.6%

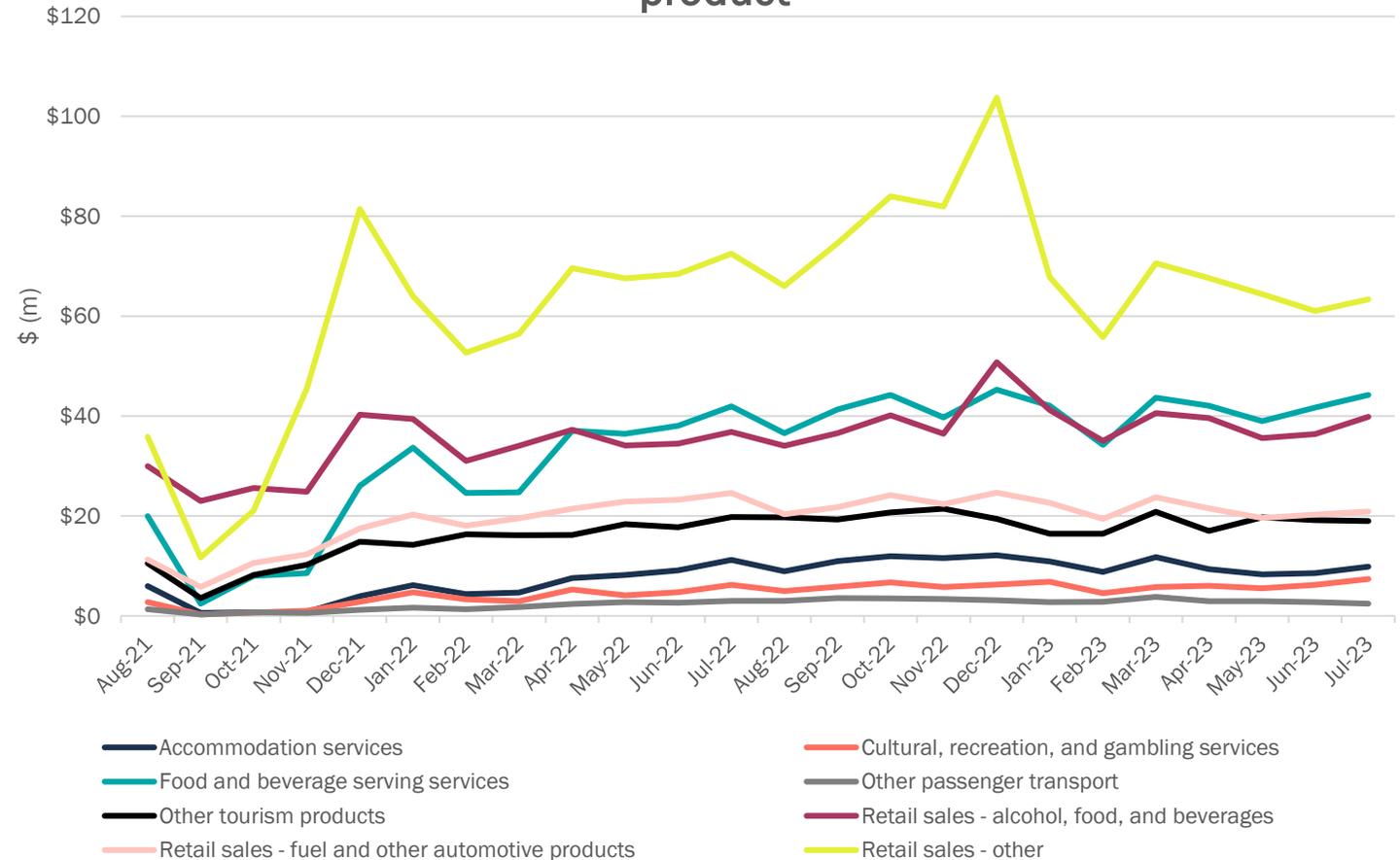
\$44.3m spent in Food & beverage by domestic visitors in July 2023, up 5.4%

	Spend (\$m)	% change
Accommodation services	9.9	-12.1%
Cultural, recreation, and gambling services	7.4	19.6%
Food and beverage serving services	44.3	5.4%
Other passenger transport	2.4	-19.8%
Other tourism products	19.0	-4.0%
Retail sales - alcohol, food, and beverages	39.9	8.1%
Retail sales - fuel and other automotive products	20.9	-15.1%
Retail sales - other	63.4	-12.6%
Grand Total	207.1	-4.2%

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Source: MBIE TECTs.

Domestic monthly tourism transactions in Auckland, by product



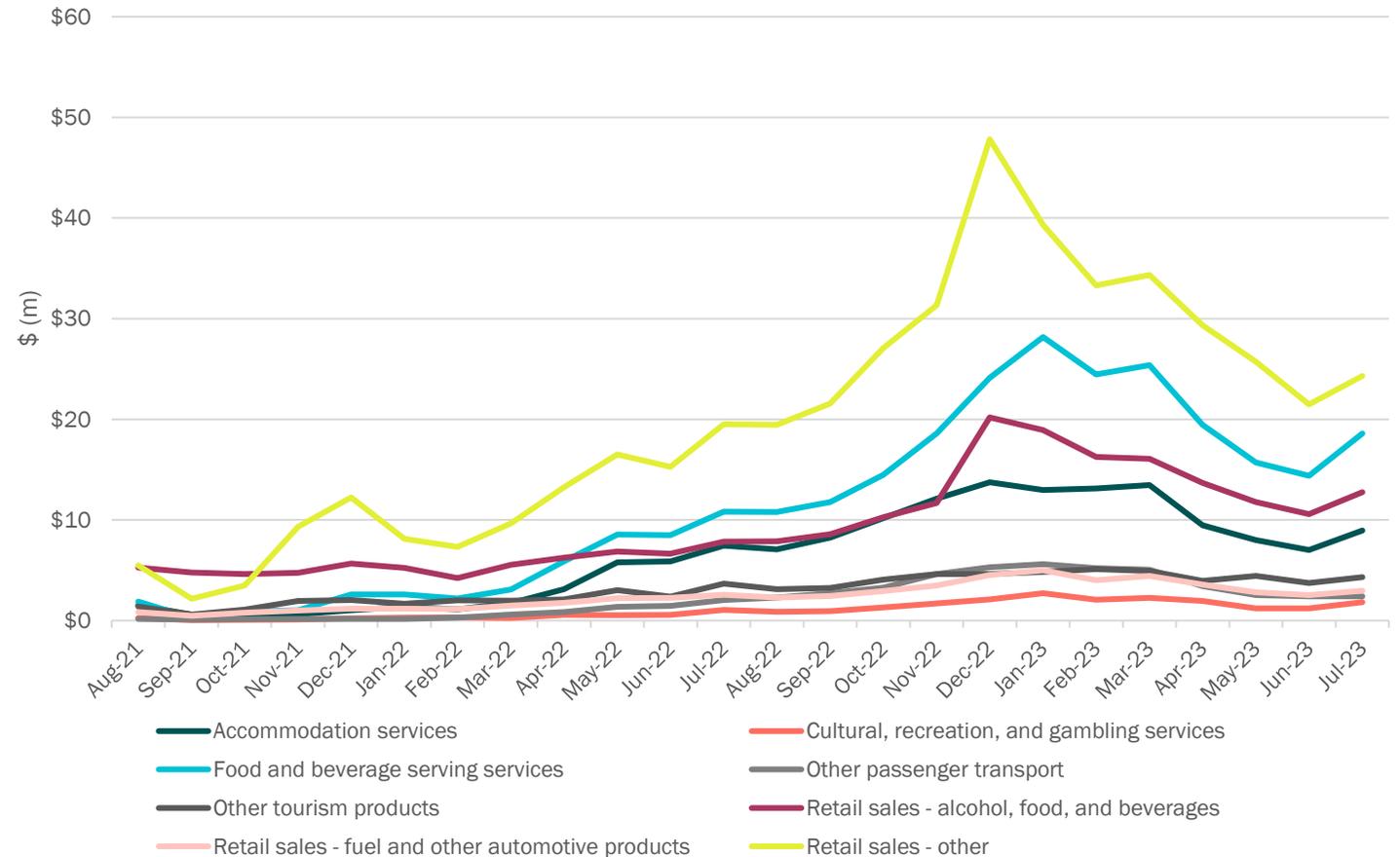
\$24.3m spent in Retail sales (other) by International visitors in July 2023, up 24.6%

	Spend (\$m)	% change
Accommodation services	8.9	20.2%
Cultural, recreation, and gambling services	1.8	73.6%
Food and beverage serving services	18.6	71.6%
Other passenger transport	2.4	18.9%
Other tourism products	4.3	16.9%
Retail sales - alcohol, food, and beverages	12.8	63.0%
Retail sales - fuel and other automotive products	3.0	16.1%
Retail sales - other	24.3	24.6%
Grand Total	76.1	38.6%

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Source: MBIE TECTs.

International monthly tourism transactions in Auckland, by product



A night scene featuring a tree illuminated with vibrant purple and red lights. The tree's branches are silhouetted against the colorful glow. To the left, a statue of a man in a long coat stands on a pedestal. The overall atmosphere is festive and artistic.

Tūrama

Auckland Tourism – Major and Business Events Data

Major Events Insights



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Source: Major Events, Tātaki Auckland Unlimited.

Event	Date	Venue	Interesting Findings
Circa's Peepshow (Club Remix)	29 June – 1 July 2023	The Civic	<ul style="list-style-type: none"> There were 536.1k domestic visitors to Auckland in the month of July 2023. The month of July saw 142.6k international visitors, up 84.4% on July 2022 (77.3k) For the month of July 2023, there were 590.3k total guest nights in commercial accommodation in Auckland, up 32.7% on the same month last year. There were 395.6k domestic guest nights in commercial accommodation (up 13.6%), and 194.7k international guest nights (up 101.1%) in commercial accommodation in July 2023. International tourism transactions in July 2023 were \$76.1m (up 38.6%) compared to July 2022.
NYO Enigma	1–2 July 2023	Auckland Town Hall	
Blocks on the Dock	13-14 July 2023	NZ Maritime Museum	
M9	6 July 2023	Aotea Centre	
AP0 - Die Tote Stadt	8 July 2023	Auckland Town Hall	
Tūrama lights	11 July – 20 August 2023	Aotea Square	
Matariki with Troy Kingi	13 July 2023	Auckland Town Hall	
Matariki Festival Day	14 July 2023	Auckland Town Hall	
All Blacks v South Africa	15 July 2023	Go Media Mt Smart Stadium	
Whānau Mārama: NZ International Film Festival	17 July – 7 August 2023	The Civic	
Elemental AKL 2023 Festival	20 July – 31 August	Various	
FIFA FAN FESTIVAL	20 July – 20 August 2023	Queens Wharf	
Winetopia	21-22 July 2023	Viaduct Events Centre	
NRL Round 21: Warriors v Raiders	21 July 2023	Mount Smart Stadium	
Fort Lane Live	22 July 2023	Fort Lane	
Tove Lo	27 July 2023	Auckland Town Hall	

Business Events Insights Q2 June 2023



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Auckland Tourism – Tourism Sentiment Index

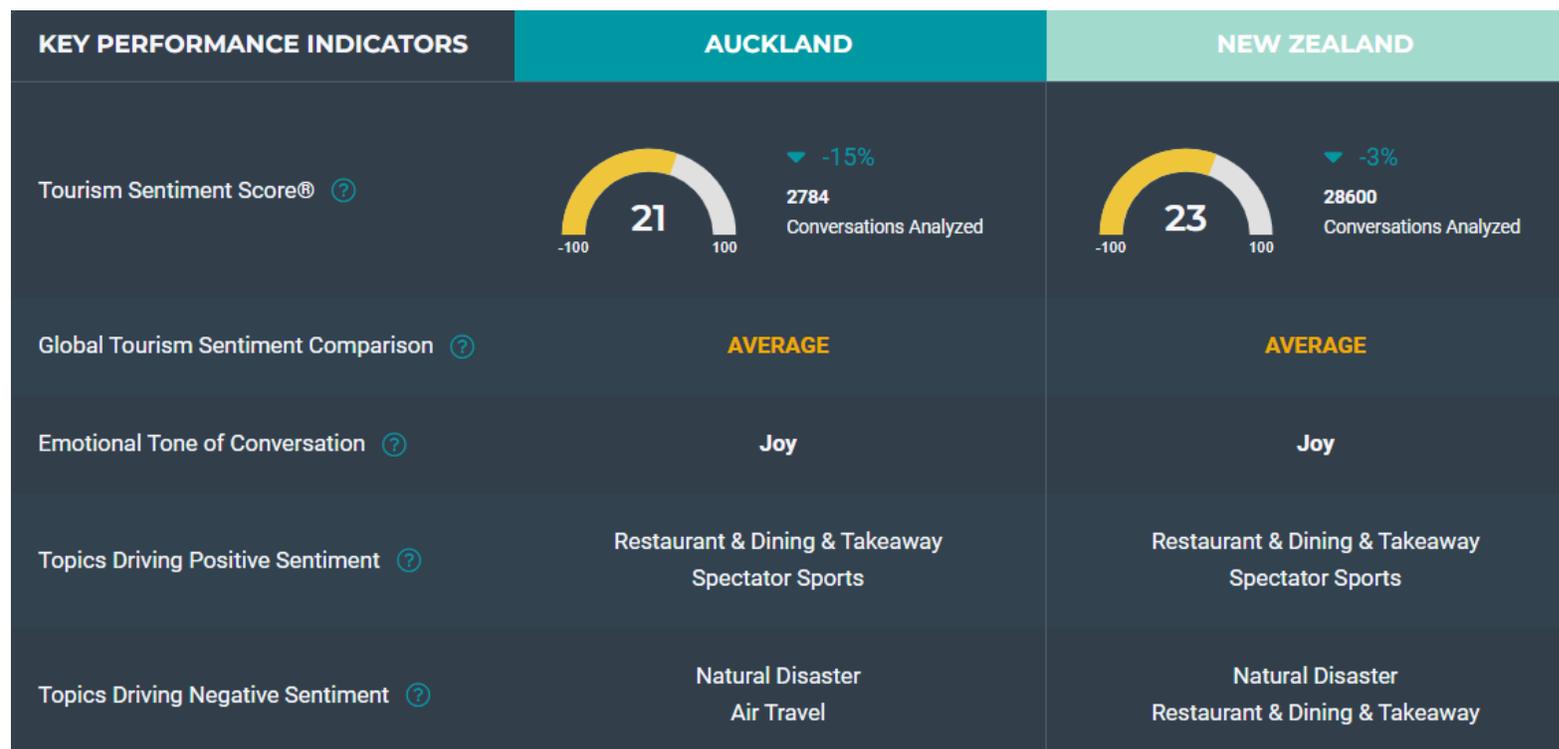
Tourism Sentiment Index (TSI)

- The Tourism Sentiment Index (TSI) is a measure of a destination's ability to generate positive word of mouth about its tourism offering.
- It is an aggregate score (ranging from -100 to +100) that focuses on online conversations and measures attitudes and overall perceptions of Auckland's tourism offering.
- The TSI analysis applies a custom, text- and image-based algorithm focused on conversations about Auckland and its connected region.
- More than 500,000 different sources are included in the analysis including online media sites, forums, reviews, and social networks (Twitter, Facebook, Instagram, YouTube, Tumblr and TripAdvisor).
- The TSI is used as an indicator to gauge current performance and provide a benchmark over time.



Tourism Sentiment Index KPIs - Overall

- The overall Tourism Sentiment Score for Auckland for the month of July 2023 was +21 (2 points less than NZ), 3 points higher than July 2022.
- Spectator Sports has for the first time been a positive driver in sentiment – another sign of the impact of FIFA WWC 2023.
- Of all conversations online being driven by Auckland’s tourism experience or products, 25% of those conversations were identified as destination promoters.
- This includes 2,784 online conversations about Auckland, while 28,600 online conversations were included for NZ.
- The TSI Score for Auckland was ‘Average’ in comparison to global tourism sentiments, which indicates an opportunity for improvement.
- The general emotional tone of online conversations was ‘Joy’ for both Auckland and NZ.



TSI Categories



- Volume is a good indicator of overall awareness. The more people are talking about a specific experience, the more awareness it drives. The top drivers for conversation about Auckland for July 2023 were Amenities and Entertainment (29%), Access and Transportation (19%), and Food and Culinary (18%).
- The category with the highest sentiment was Relaxation and Wellness (36), followed by Food and Culinary (33) and Amenities and Entertainment (23), while Safety (-13), had the lowest sentiment.
- Sub-categories that drove positive sentiment were Spa and Wellness (70), Shopping (65), Winery and Vineyards (48), Attractions (40) and Nightlife (39).
- The lowest sentiment was recorded in Skydiving, Bungee and Ziplining (-42), Natural Disaster (-14), and Ground Transportation (-5).
- Joy was the general emotional tone for the majority of categories for the month of July 2023 however Anger was linked to Access and Transportation and Fear associated with Safety.

CATEGORIES	AUCKLAND			NEW ZEALAND		
	Volume	Emotion	Sentiment	Volume	Emotion	Sentiment
▲ Amenities + Entertainment	29% ▲ 18%	Joy	23 Average	27% ▲ 13%	Joy	22 Average
▲ Access + Transportation	19% ▼ 25%	Anger	11 Average	13% ▼ 11%	Anger	9 Average
▲ Food + Culinary	18% ▲ 2%	Joy	33 Average	14% ▲ 0%	Joy	34 High
▲ Safety	10% ▲ 4%	Fear	-13 Average	13% ▲ 0%	Fear	-12 Average
▲ Outdoor Activities	10% ▲ 3%	Joy	13 Average	17% ▼ 1%	Joy	23 Average
▲ Destination Services	6% ▲ 3%	Joy	18 Average	5% ▼ 1%	Joy	28 Average
▲ Relaxation + Wellness	5% ▲ 0%	Joy	36 High	6% ▲ 0%	Joy	37 High
▲ Culture + History	2% ▼ 6%	Joy	11 Average	4% ▼ 1%	Joy	15 Average

Tourism Sentiment Index Score Trends



- The Tourism Sentiment Index (TSI) Score trend line for Auckland has seen a steady decline from September 2022 to February 2023.
- The TSI Score rose again in July 2023, with the FIFA WWC being an influencing driver (as shown on slide 36).
- This year previous peaks can be seen in March-April, driven consistently by the topic 'Restaurant, Dining and Takeaways' with high sentiment also recorded in the 'Food and Culinary' category. This shows that Auckland is recognised as a reputable food destination.





Auckland Visitor Survey

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%

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

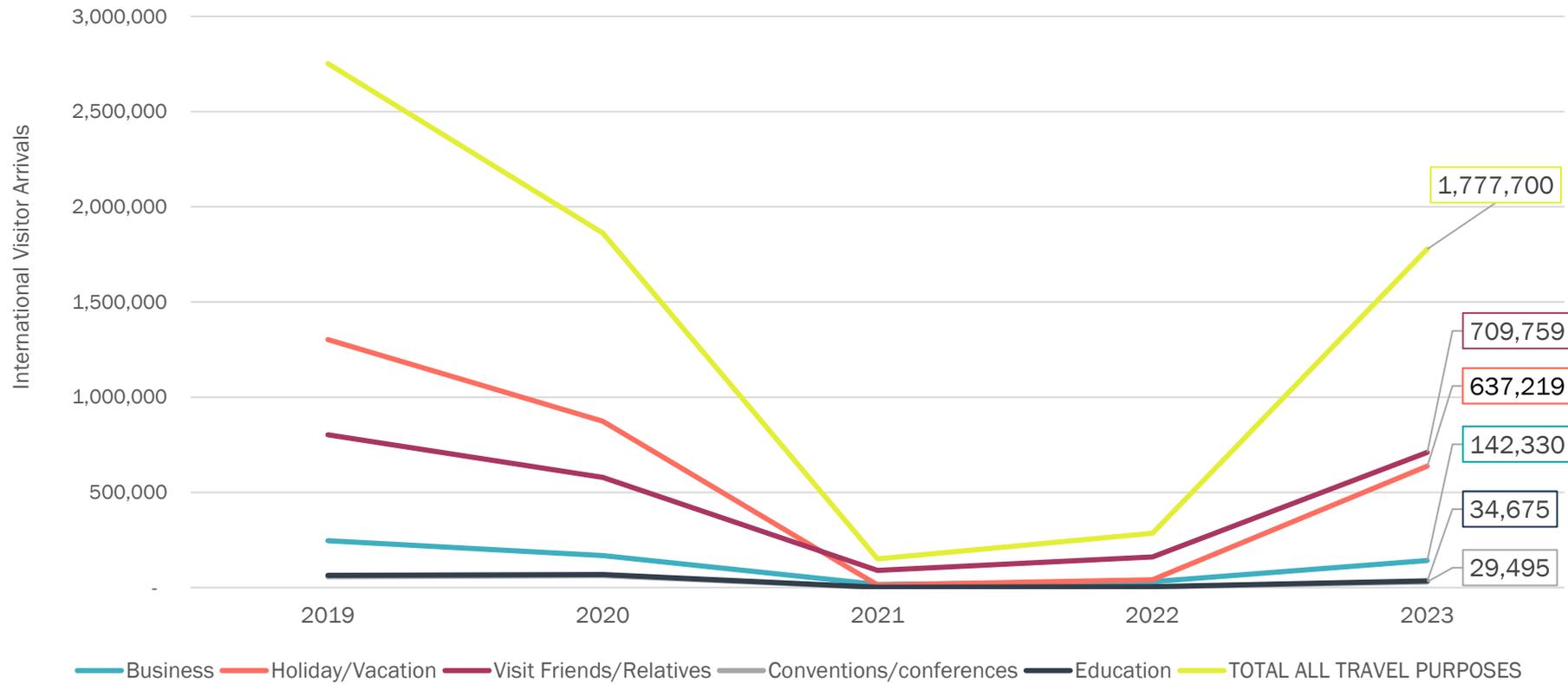
Compared to
YE June 2021

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.



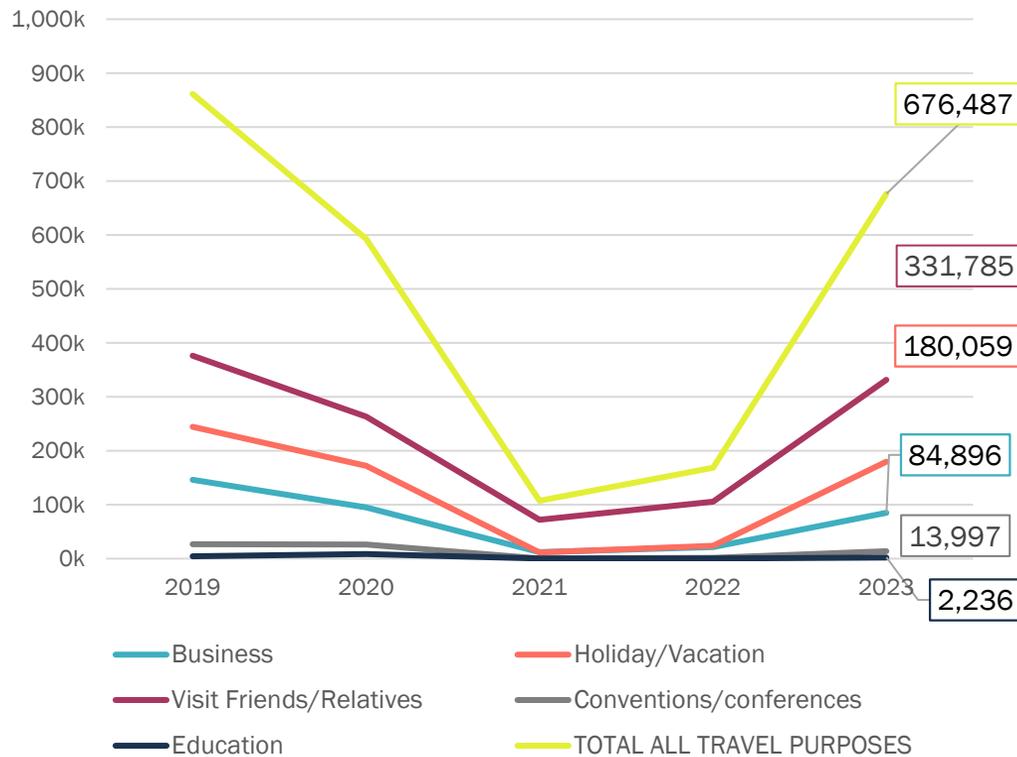
Five-year trends in key markets

Five-year visitor arrivals to Auckland, YE July

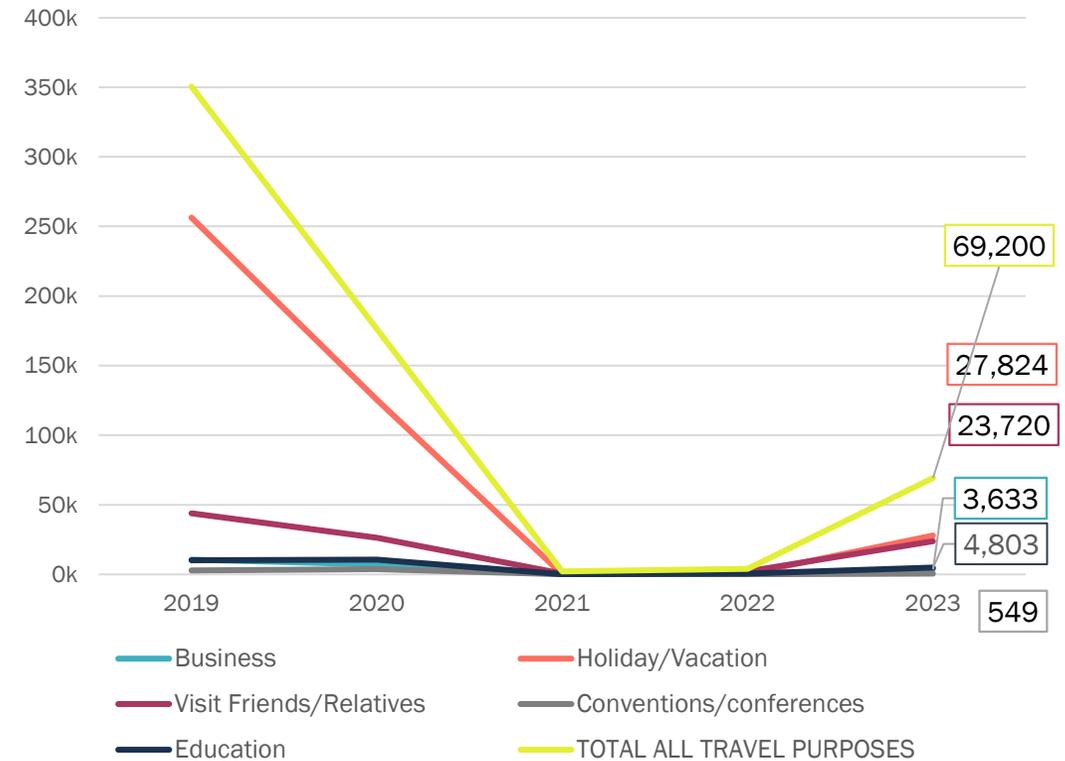


Five-year visitor arrivals to Auckland, YE July

Australia

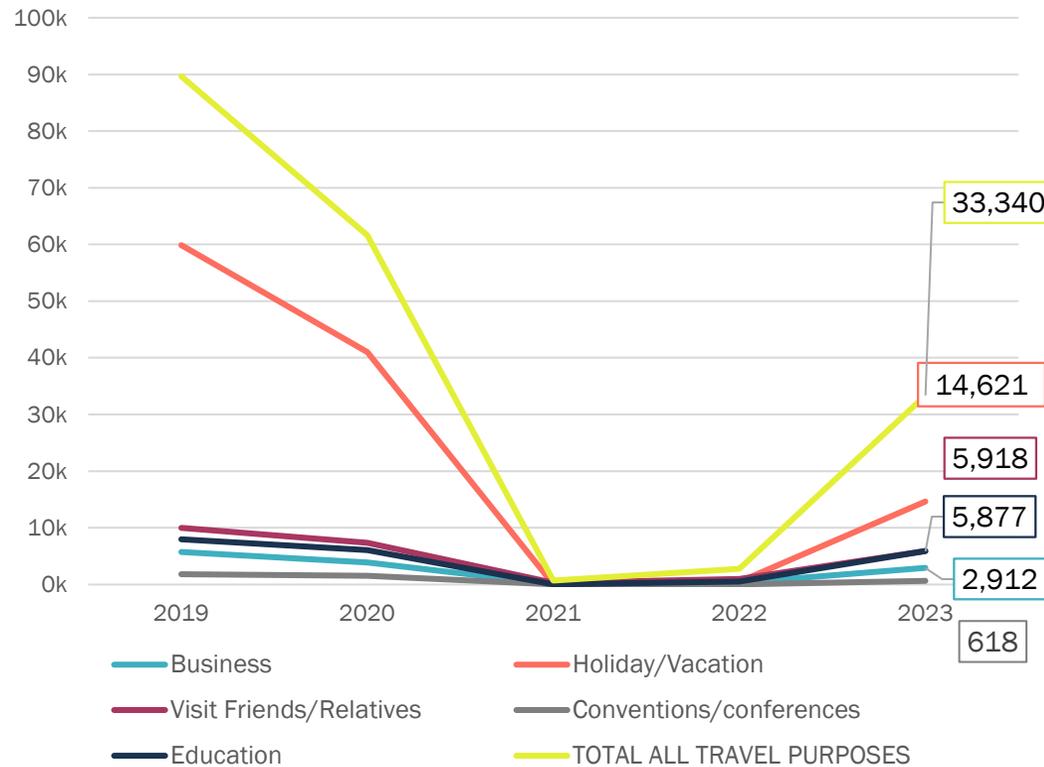


China

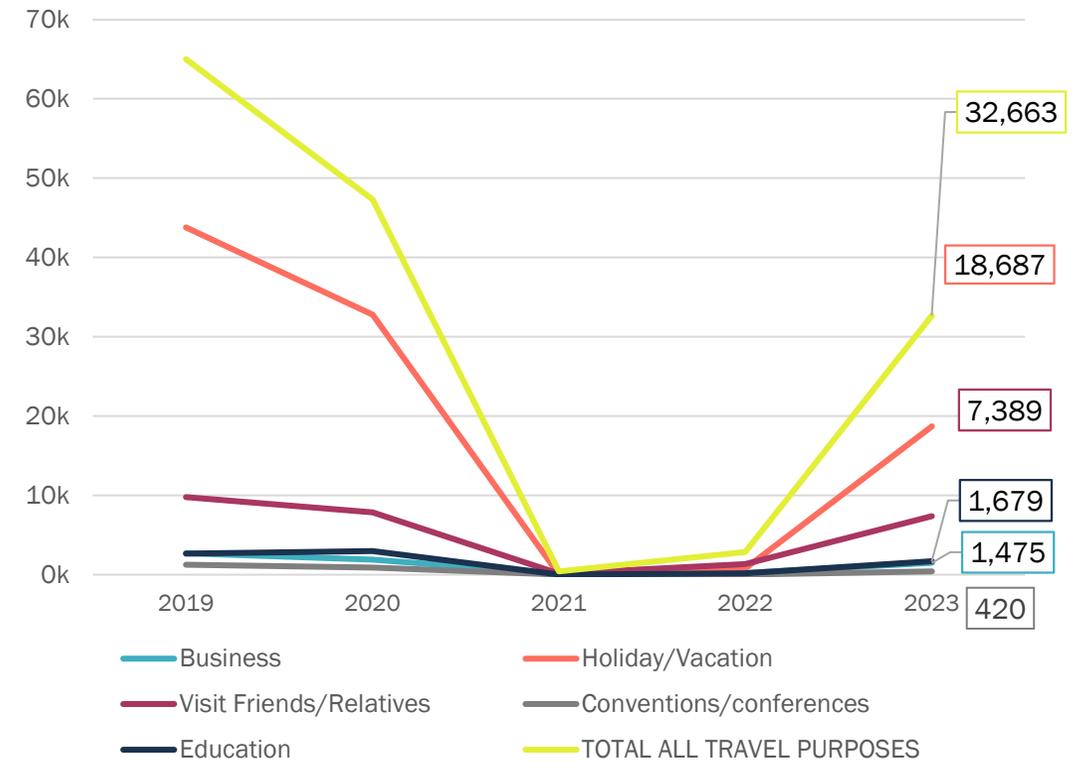


Five-year visitor arrivals to Auckland, YE July

Japan

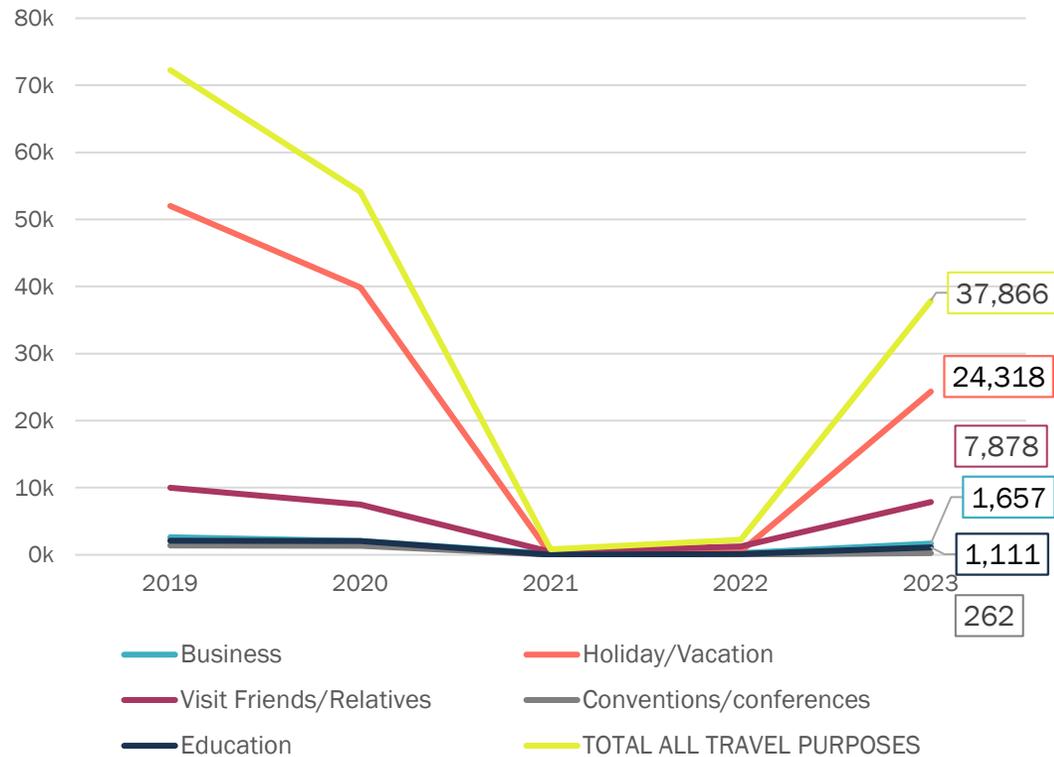


Korea

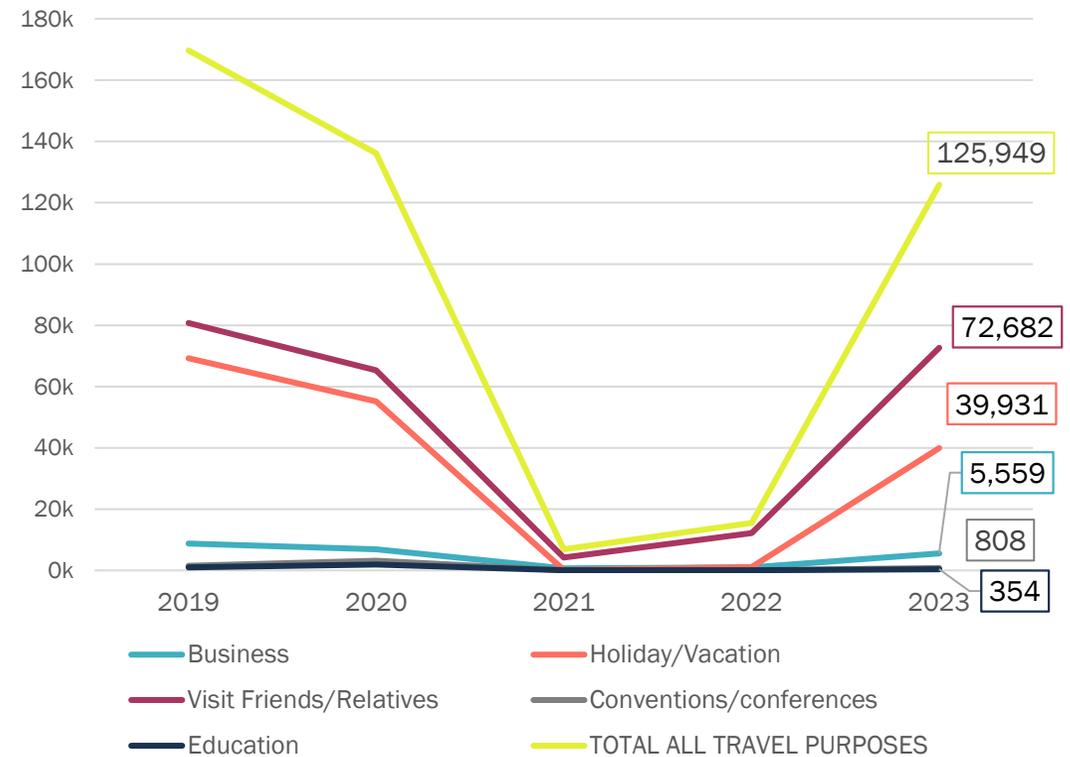


Five-year visitor arrivals to Auckland, YE July

Germany

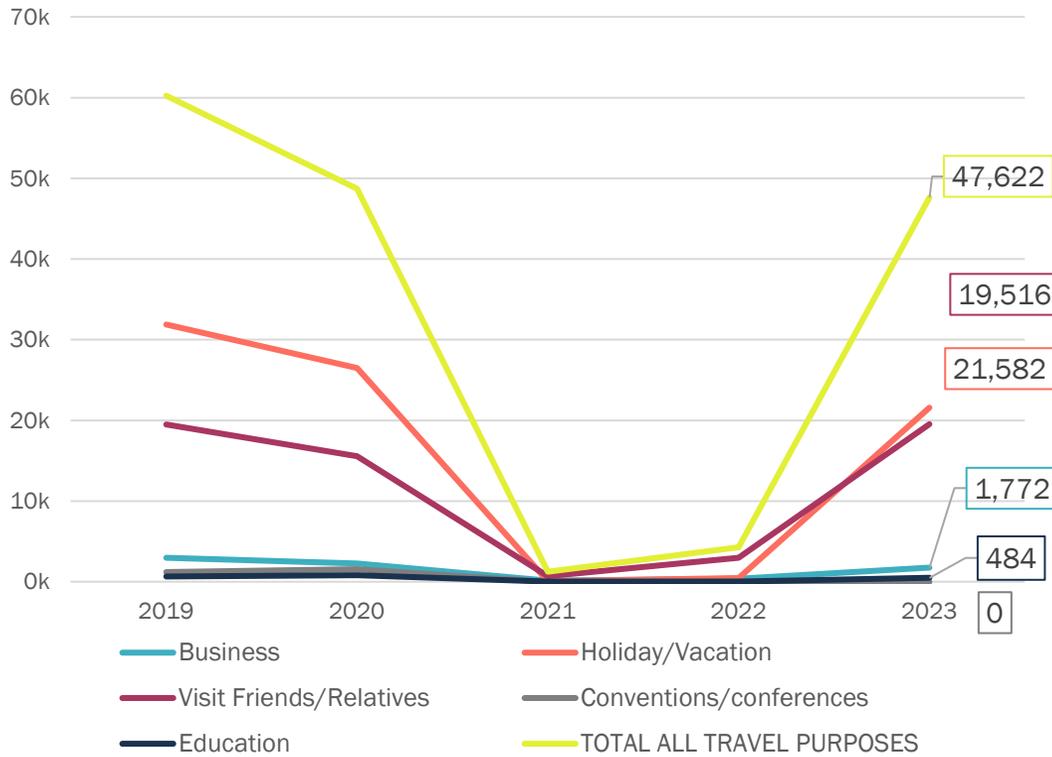


UK

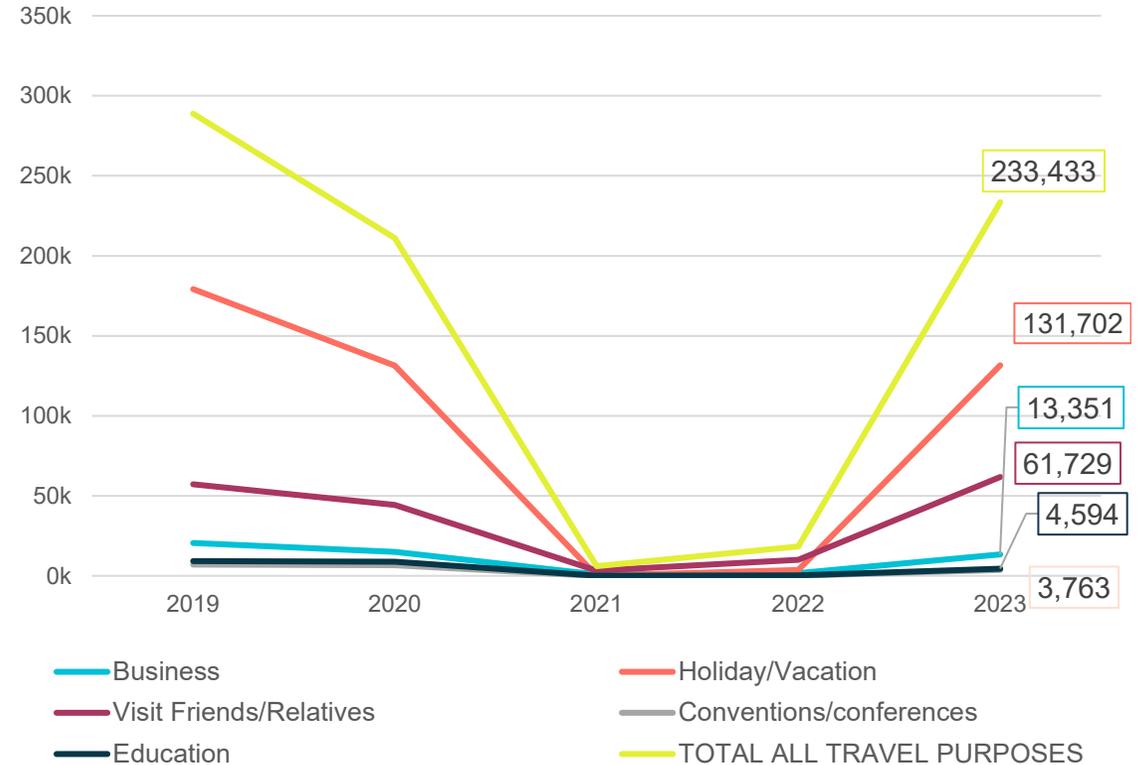


Five-year visitor arrivals to Auckland, YE July

Canada



US



Ngā mihi Thank you

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