

Tātaki
Auckland
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Auckland Destination Overview

September 2022

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

Prepared November 2022
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Key Visitor Data




394.3^k

Domestic Visitors
September 2022 (Month)
+71.2% (to September 2021)




92.4^k

International Visitors
September 2022 (Month)
+5398.0% (to September 2021)




57.8%


Hotel Occupancy Rate
September 2022 (Month)
+50.3pts (to September 2021)




\$206^m

Domestic Tourism Transactions
September 2022 (Month)
+335.6% (to September 2021)




\$62^m

International Tourism Transactions
September 2022 (Month)
+586.6% (to September 2021)




+22

Tourism Sentiment Score
September 2022 (Month)
+4pts (to September 2021)



Key Visitor Data



DOMESTIC

- Domestic visitation to Auckland fluctuated over the last 24 months. There was a sharp drop in domestic visitors from August through to December 2021 as Auckland moved to Alert Levels 4 then 3 of the COVID-19 Alert System. Domestic visitation rebounded in December 2021, when all of NZ shifted to the COVID-19 Protection Framework (also known as the traffic lights).
- There were **394.3k domestic visitors to Auckland in the month of August 2022, an increase of 71.2%** on the previous August.
- The year to August 2022 saw 5.62m domestic visitors to Auckland, down 10.7%** on last year.
- There were **349.1k domestic guest nights in commercial accommodation** for the month of **September, up 519.0%**.
- Domestic tourism transactions** for the year to September 2022 was **\$2.01b, down 2.6%** on last year and **\$206.4 for the month (up 335.6%** compared to September 2021).
- For **domestic visitors** in **YE June 2022**, the **Net Promoter Score (NPS)** was **+1**, (down 6 points on YE June 2021).

INTERNATIONAL

- New Zealand's border fully reopened at the end of July 2022 – three months earlier than originally planned.
- Monthly international visitors (92.4k) were up 5398.0%** on the previous September.
- The year to September 2022 saw 447.6k international visitor arrivals, an increase of 208.3%** on 2021.
- There was strong growth for the **Australian market** in the month of **September 2022**, with **53.8k visitors, an increase of 41246.9%** compared to last September. **The year to September 2022 saw 265.9k Australian visitor arrivals, also up 153.8%**.
- VFR visitors** contributed the most to annual visitor numbers (**230.2k**) and **increased 159.5%** on the year to September 2021. **Monthly VFR numbers (38.4k) were also up 5786.0%** compared with the month of September 2021.
- Holiday visitors (86.2k) were up 561.4% for the year**, with monthly numbers (**27.8k**) also up **89664.5%**.
- 116.6k international guest nights in commercial accommodation** for September, **up 1375.9%** on last year.
- International tourism transactions** was **\$0.41b** for the year, **up 34.5%** and **\$61.7m for the month (up 586.6%)**.

OVERALL

- September Occupancy was 57.8%, up 50.3 percentage points** on September 2021. The **ADR was \$210 (up 61.2%)** and the **RevPAR was \$121 (up 1144.9%)**.
- For the month of September 2022, there were **465.7k total guest nights in commercial accommodation** in Auckland, **up 624.3%** on last year.
- Looking forward, overall occupancy on the books is higher this year** compared to the same period last year (i.e., from November 2022 to February 2023).
- Occupancy peaked at 75% on the 12th November this year. On this date, the Rugby World Cup final was held at Eden Park where the Black Ferns played England, and there was also a Teeks concert at Spark Arena. Friday Jams Live was held the next day at Western Springs Stadium.
- The **Tourism Sentiment Score** for Auckland for September 2022 **was +22** (+1pt to NZ), up 4 points to September 2021.
- The category with the highest sentiment was Food and Culinary (29), followed by Relaxation and Wellness (27), and Outdoor Activities (26), while Safety (-4), and Access and Transportation (7) had the lowest sentiment.

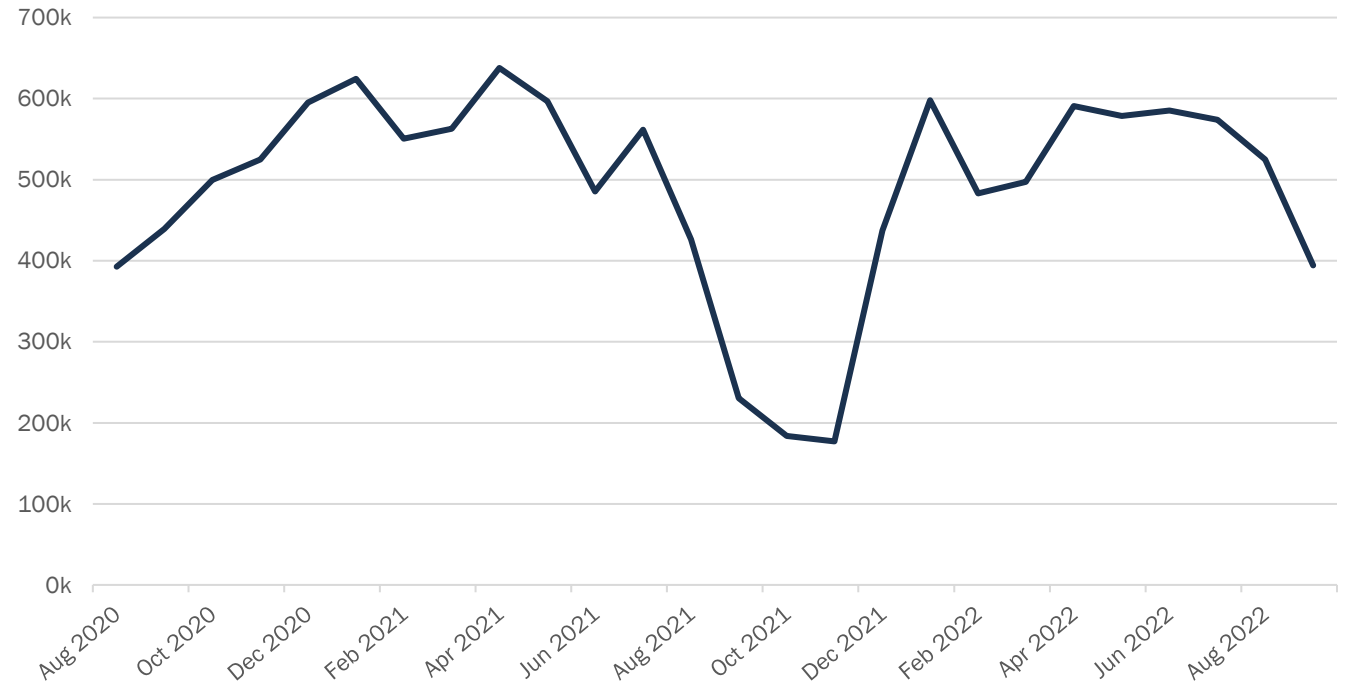


Auckland Tourism – Visitor Arrivals Data

394.3k Domestic visitors in September 2022, up 71.2%

- Domestic visitation to Auckland fluctuated over the last 24 months. There was a sharp drop in domestic visitors from August through to December 2021 as Auckland moved to Alert Levels 4 then 3 of the COVID-19 Alert System. Domestic visitation rebounded in December 2021, when all of NZ shifted to the COVID-19 Protection Framework (also known as the traffic lights).
- There were **394.3k domestic visitors** to Auckland in the month of **September 2022**, an increase of **71.2%** on the previous September.
- The year to **September 2022** saw **5.62m domestic visitors** to Auckland, **down 10.7%** on last year.

Domestic Visitors to Auckland



	Total Domestic Visitors	vs. previous year / YE
September 2022	394,332	71.2%
YE September 2022	5,624,409	-10.7%

International visitor arrivals were up 5398.0% in September 2022

- New Zealand’s border fully reopened at the end of July 2022 – three months earlier than originally planned.
- The month of September saw **92.4k international visitors**, up **5398.0%** on the previous September.
- The year to September 2022 saw **447.6k international visitor arrivals**, an increase of **208.3%** on the previous year.
- **VFR visitors** contributed the most to annual visitor numbers (**230.2k**) and increased **159.5%** on the year to September 2021. Monthly VFR numbers (**38.4k**) were also up **5786.0%** compared with the month of September 2021.
- **Holiday visitors (86.2k)** were up **561.4%** for the year, with monthly numbers (**27.8k**) also up **89664.5%**.
- There were **50.4k business visitors (up 233.3%)** in the year to September 2022, and **10.9k** for the month (up **5330.3%**).

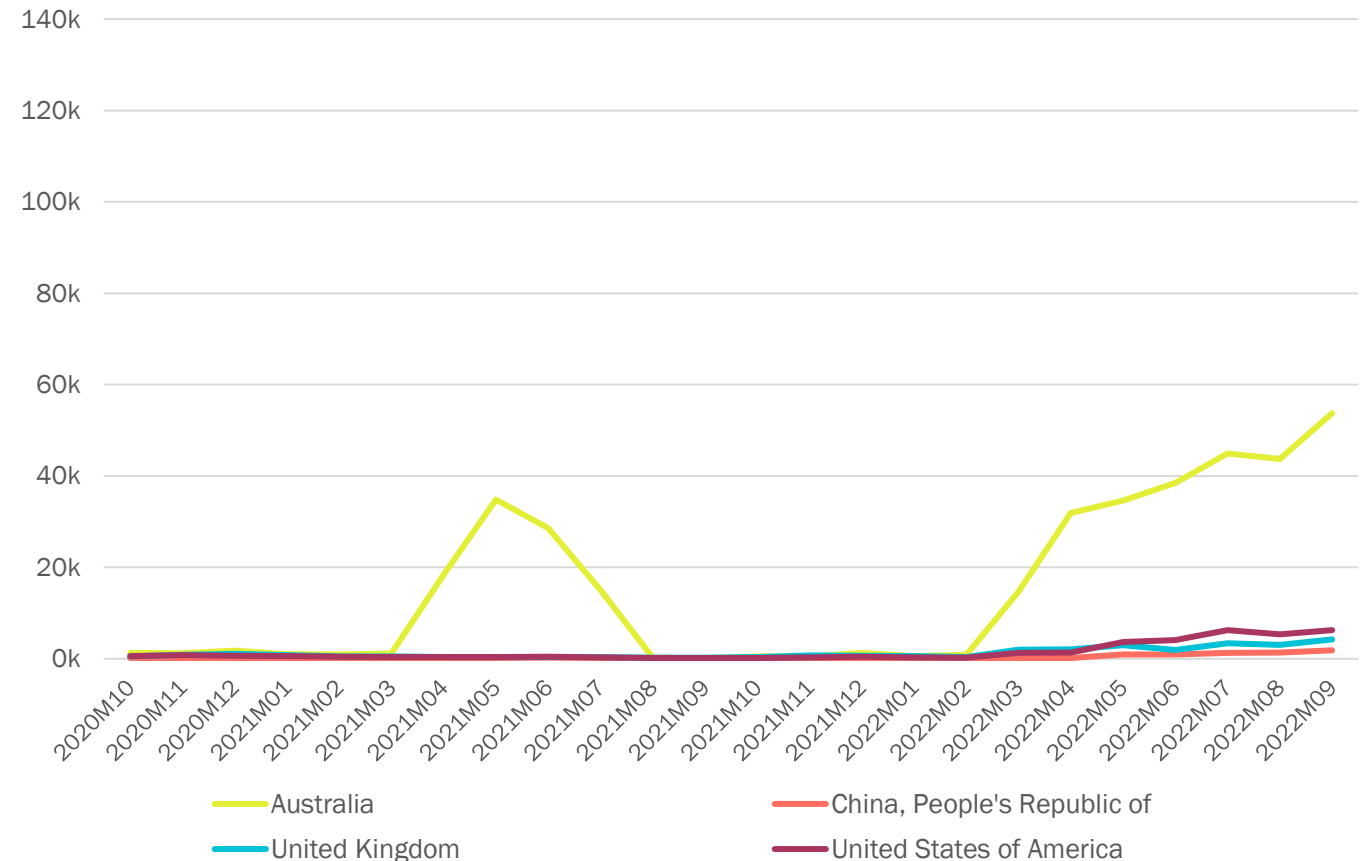


	Visitor arrivals	vs. previous year / YE
September 2022	92,421	5398.0%
YE September 2022	447,609	208.3%

265.9k Australian visitor arrivals in YE September 2022, up 153.8%

- Australian visitation increased in April 2021, when the trans-Tasman travel bubble opened. However, the preceding lockdowns and travel restrictions put a halt to this. Australian visitor arrivals kickstarted again in March 2022 when the NZ border reopened to vaccinated Kiwis and other eligible travellers from Australia.
- There was strong growth for **Australian visitors** in the month of September 2022, with **53.8k visitors, an increase of 41246.9%** compared to last September. **The year to September 2022 saw 265.9k** Australian visitor arrivals, **up 153.8%**.
- For YE September 2022, there were 22.3k visitor arrivals from the UK (up 258.2%) and 29.7k visitors from the US (up 451.1%).
- Visitors from China (7.0k) were also up for the year (274.8%), and up (2591.2%) for the month of September (1,830).

Visitor arrivals in Auckland by key international markets



24 month visitor arrivals from individual markets

Australia



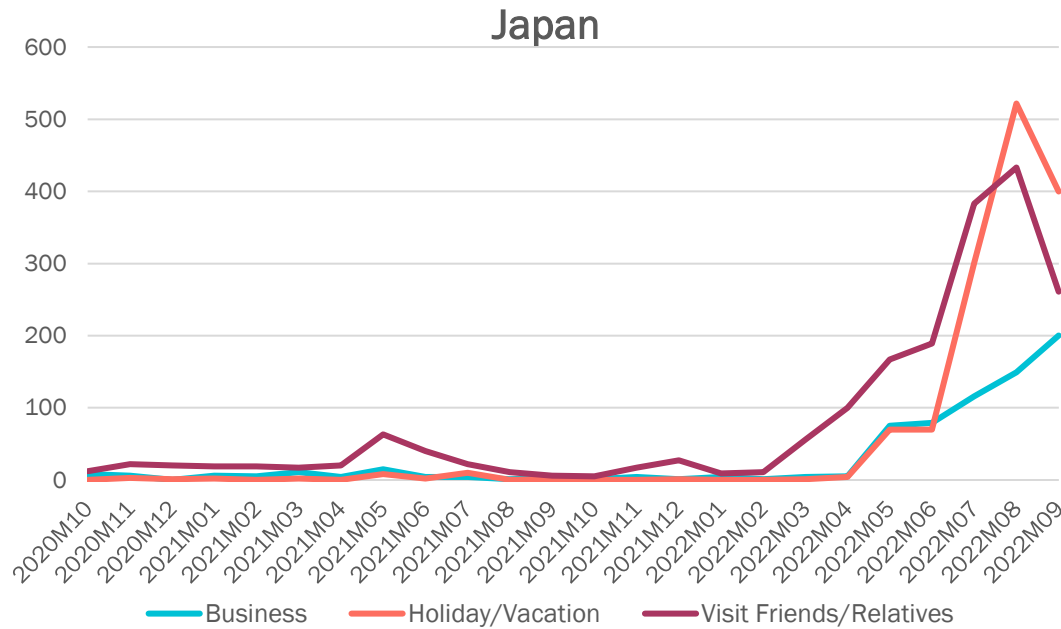
China



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	7,369	49026.7%	15,319	765850.0%	24,914	34990.1%	53,751	41246.9%
YE September 2022	36,814	212.6%	47,487	314.9%	151,823	113.5%	265,923	153.8%

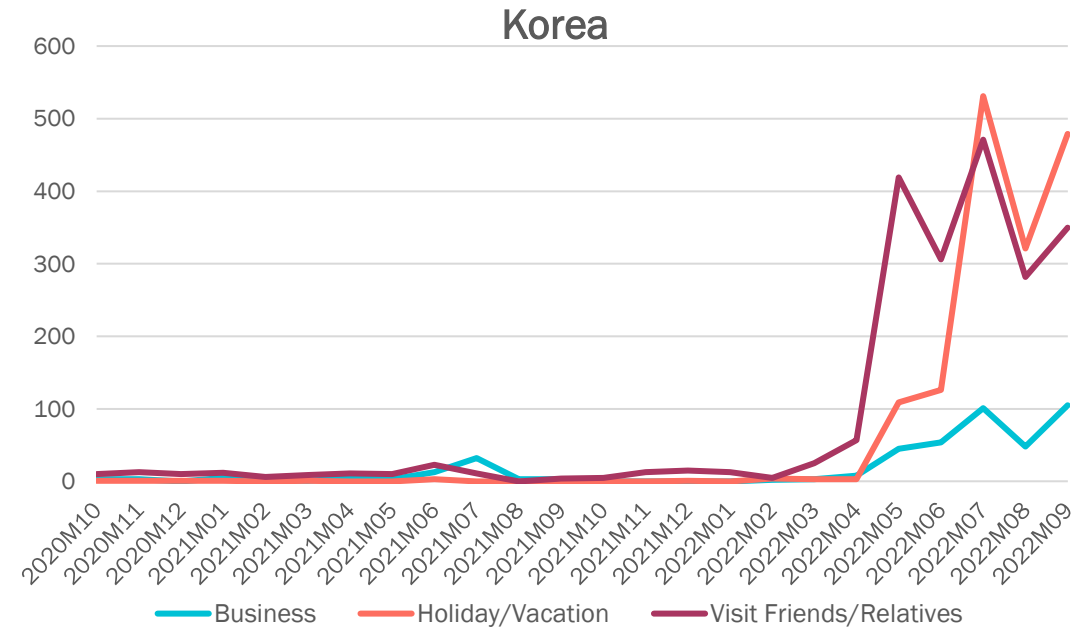
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	88	1367%	238	5850.0%	991	5729.4%	1,830	2591.2%
YE September 2022	357	335.4%	814	835.6%	3,594	529.4%	7,028	274.8%

24 month visitor arrivals from individual markets



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	200	6566.7%	400	39900.0%	261	4250.0%	1,224	7100.0%
YE September 2022	639	853.7%	1,369	4620.7%	1,658	511.8%	5,446	848.8%

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	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	105	3400.0%	479	47900.0%	350	8650.0%	1,073	13312.5%
YE September 2022	366	401.4%	1,577	19612.5%	1,961	1547.9%	4,673	1242.8%

24 month visitor arrivals from individual markets

Germany



UK



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	138	2200.0%	877	87700.0%	215	1243.8%	1,419	5357.7%
YE September 2022	456	250.8%	1,661	10281.3%	1,630	260.6%	4,313	471.3%

	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	534	1470.6%	1,051	13037.5%	2,181	1373.6%	4,211	1625.8%
YE September 2022	1,676	184.1%	2,631	1514.1%	16,075	290.4%	22,261	258.2%

24 month visitor arrivals from individual markets

Canada



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	115	1337.5%	485	48400.0%	613	2013.8%	1,387	2789.6%
YE September 2022	526	283.9%	1,293	2593.8%	4,213	537.4%	6,749	510.8%

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US



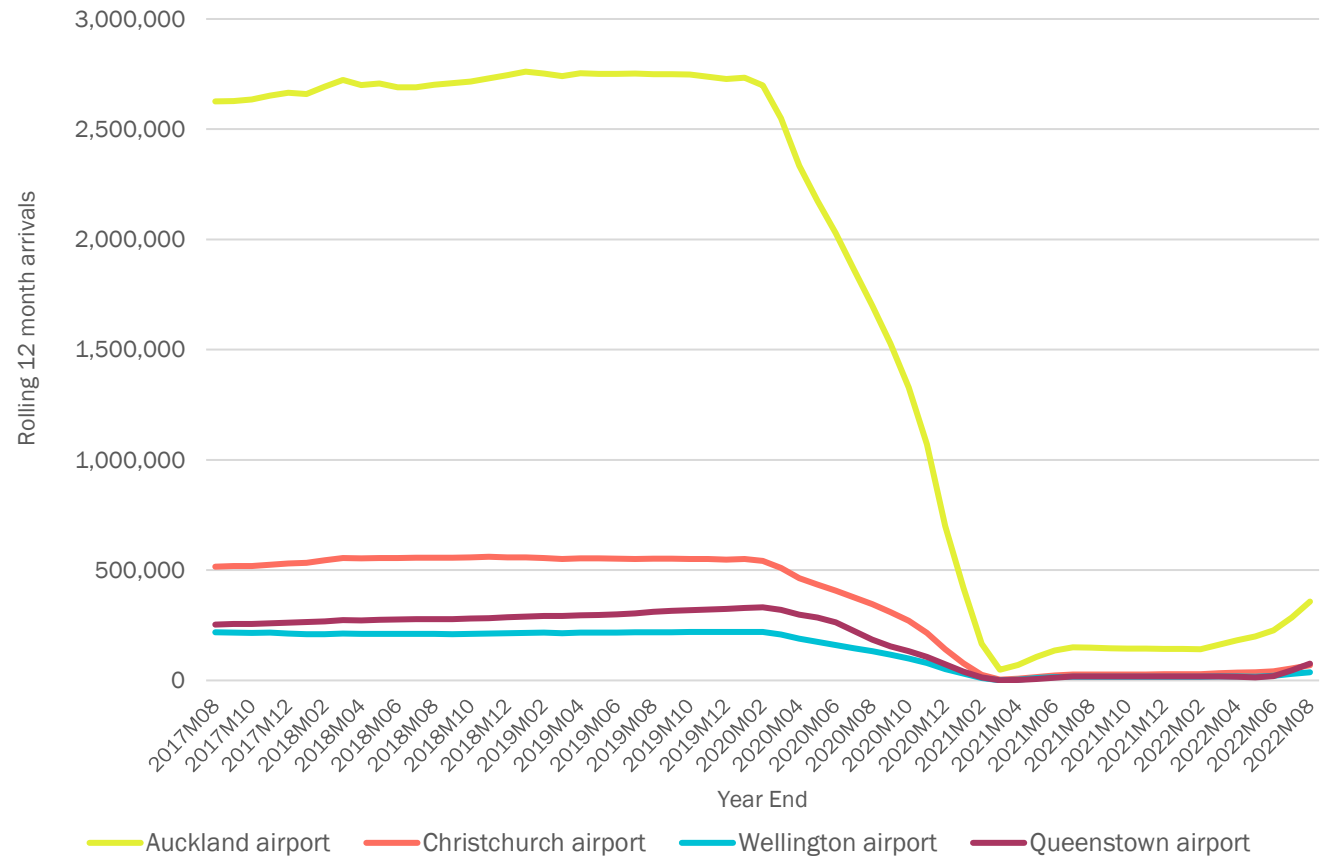
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
September 2022	830	2762.1%	2,587	258600.0%	2,030	2929.9%	6,282	4485.4%
YE September 2022	3,232	309.6%	7,926	4207.6%	14,194	353.6%	29,733	451.1%

Auckland has seen a 208.3% increase in international visitor arrivals over the last year

- In the five years preceding the arrival of Covid in 2020, all major airports had seen steady increases in international visitor arrivals.
- The Covid-related travel bans have had a clear effect on all ports with the greatest impact seen in Auckland reflecting the largest market share.
- However, with NZ borders starting to reopen, Auckland has seen a 208.3% increase in international visitor arrivals over the last year.
- For the year ending September 2022, all other ports saw growth in international visitor arrivals in comparison to last year. Christchurch saw an increase of 233.2%, Queenstown was up 488.9% and Wellington up 184.4% compared to last year.

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12 month rolling visitor arrivals





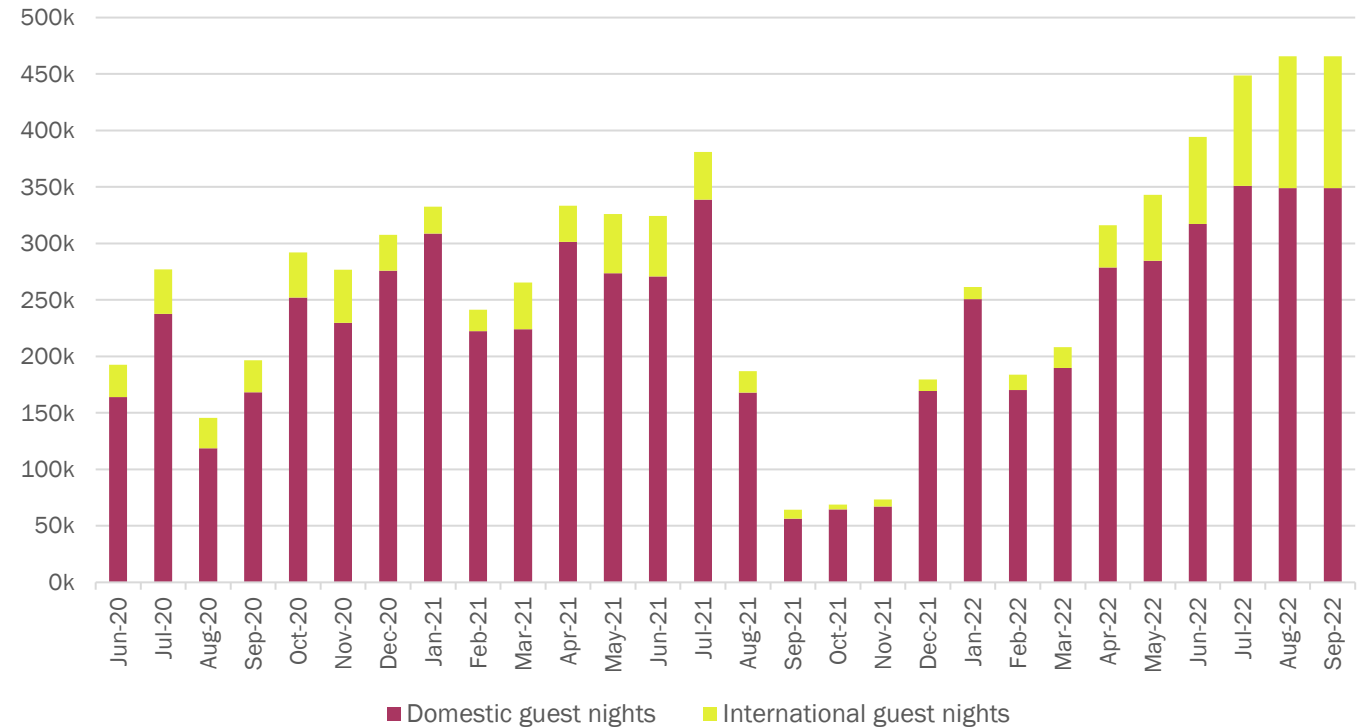
Auckland Tourism – Accommodation Data

116.6k international guest nights in commercial accommodation in September 2022, up 1375.9%

- For the month of September 2022, there were **465.7k total guest nights** in commercial accommodation in Auckland, up **624.3%** on the same month last year.
- There were **349.1k domestic guest nights** in commercial accommodation (up 519.0%), and **116.6k international guest nights (up 1375.9%)** in commercial accommodation in September 2022.
- For New Zealand overall, there were 2.47m guest nights in commercial accommodation, up 169.6% compared to September 2021.

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Guest nights in commercial accommodation - Auckland



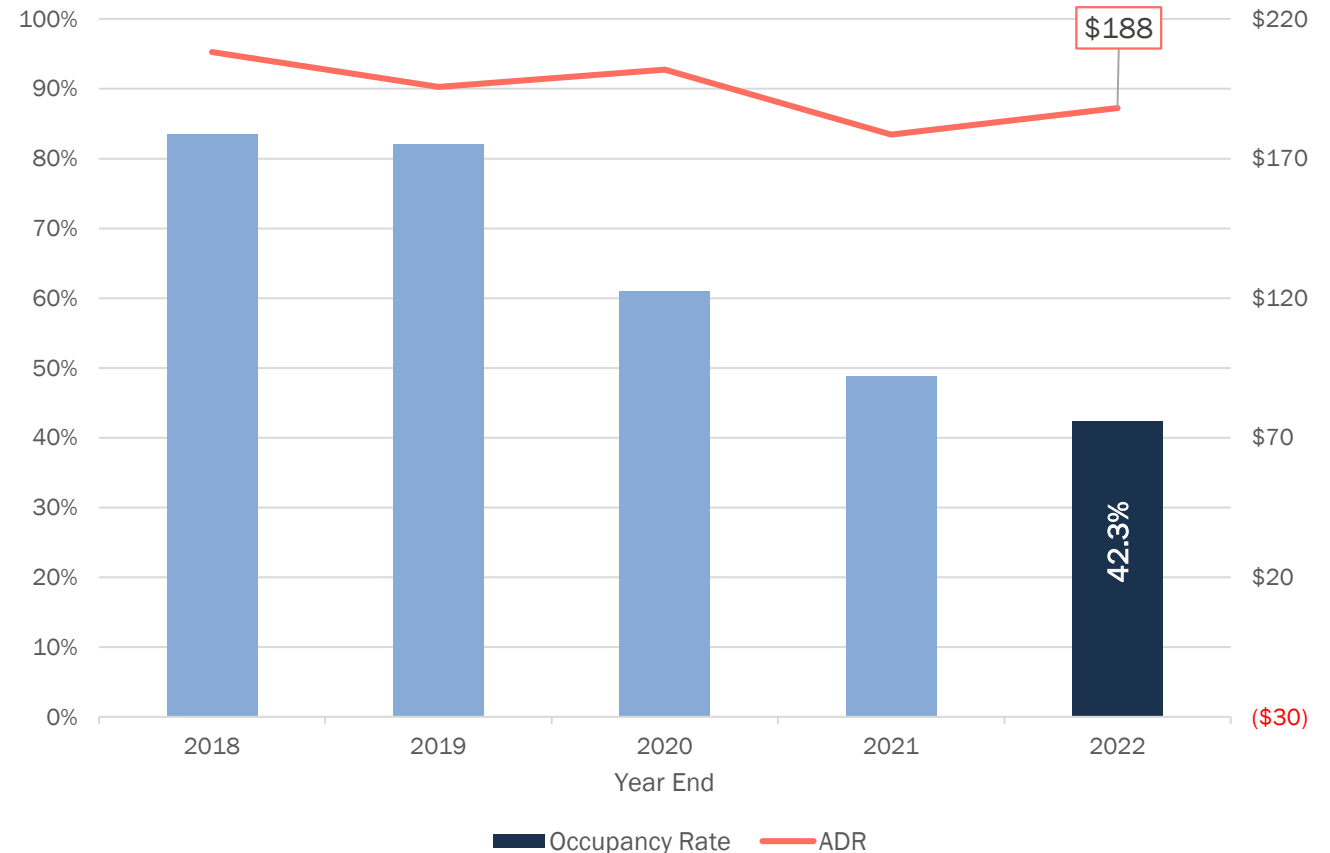
September 2022	Auckland	% change	New Zealand	% change
Total guest nights	465,700	624.3%	2,471,800	169.6%
Domestic guest nights	349,100	519.0%	1,945,300	124.8%
International guest nights	116,600	1375.9%	526,500	924.3%

September 2022

Average daily rate (ADR) was \$210, up 61.2%

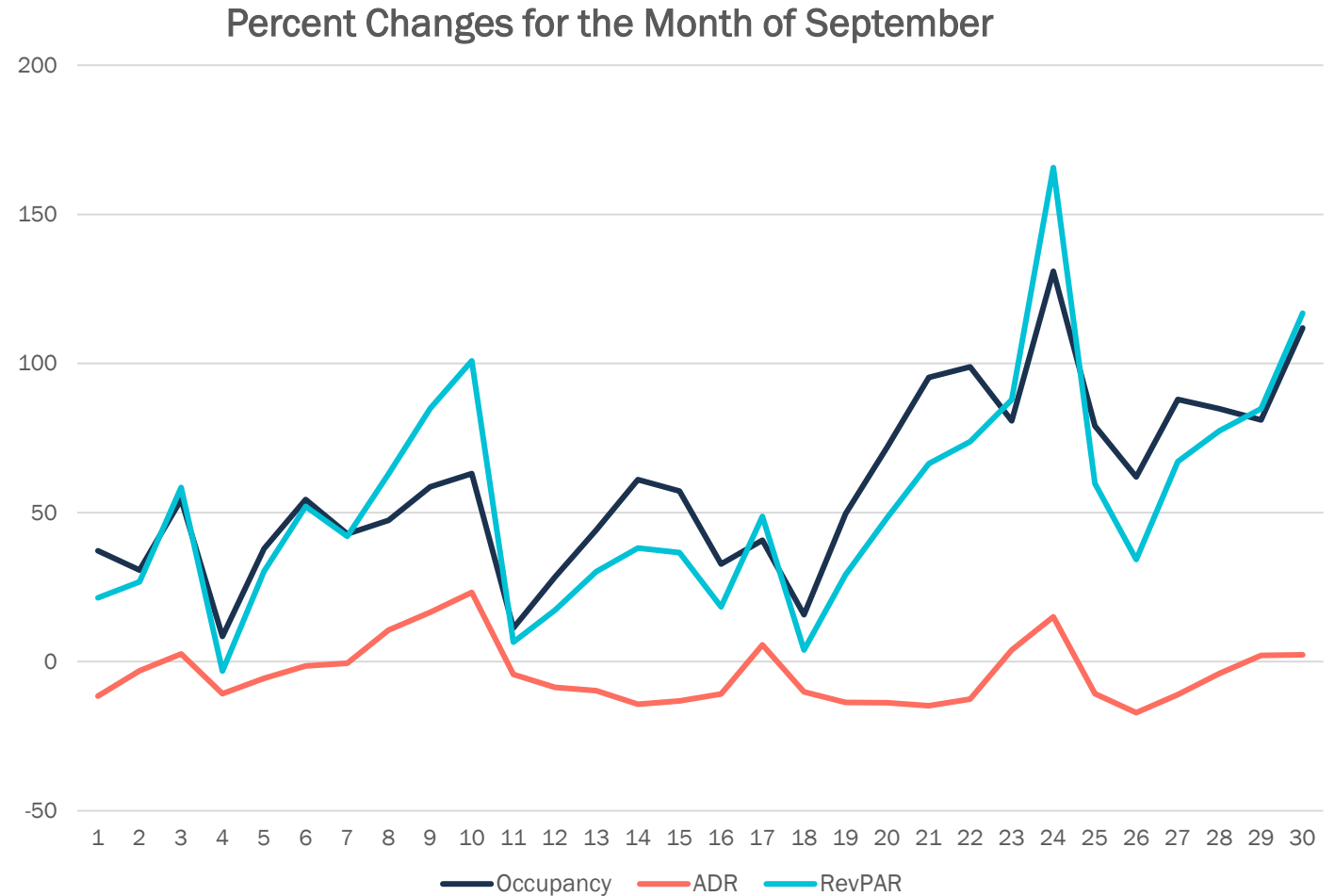
- **September Occupancy** was **57.8%**, up **50.3pts** to September 2021. The **ADR** was **\$210** (up **61.2%**) and the **RevPAR** was **\$121** (up **1144.9%**).
- Covid affected the year-end average hotel occupancy rate, which was **42.3%** for the **year to September 2022**, with a **decrease of 6.6pts** compared to the previous year-end.
- The average daily rate (ADR) for hotels in the year to September 2022 was **\$188** up **5.3%** on the previous year.
- The **RevPAR** for the year ending September 2022 was **\$80** down **8.8%** on the previous year.

Annual Hotel Accommodation in Auckland Occupancy and Average Daily Rate



Occupancy was 57.8% higher in September 2022, compared to 2021

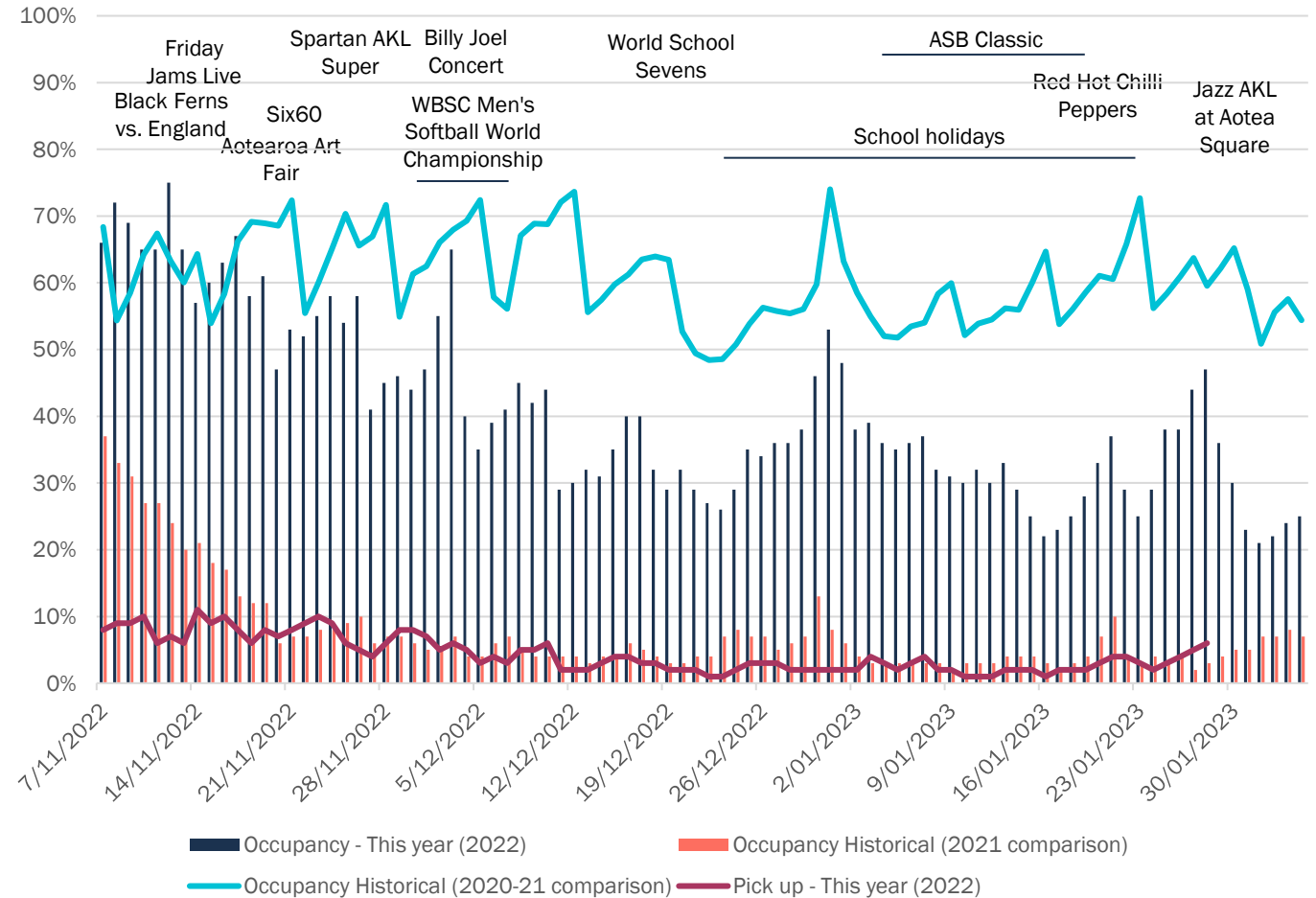
- A quarter (26%) of the hotels covered here are in fact, isolation hotels.
- Occupancy was 57.8% higher during the month of September this year, compared to September last year.
- RevPAR was 53.0% higher in September 2022 compared to last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in September 2022. ADR peaked on Saturday 10th September, while Occupancy and RevPAR peaked on Saturday 24th September 2022 (the night of the All Blacks vs Australia game at Eden Park).



90 Day Forward Booking Occupancy Data

- Looking forward, overall occupancy on the books is higher this year compared to the same period last year (i.e. from November 2022 to early February 2023).
- Occupancy peaked at 75% on the 12th November this year. On this date, the Rugby World Cup final was held at Eden Park where the Black Ferns played England, and there was also a Teeks concert at Spark Arena. Friday Jams Live was held the next day at Western Springs Stadium.
- There is a spike in occupancy (65%) on 3rd December 2022. Billy Joel and Big Thief play in Auckland on this date.
- Auckland occupancy is currently at 53% on New Years Eve (31st December 2022).

Occupancy - 90 Day Forward Outlook



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.

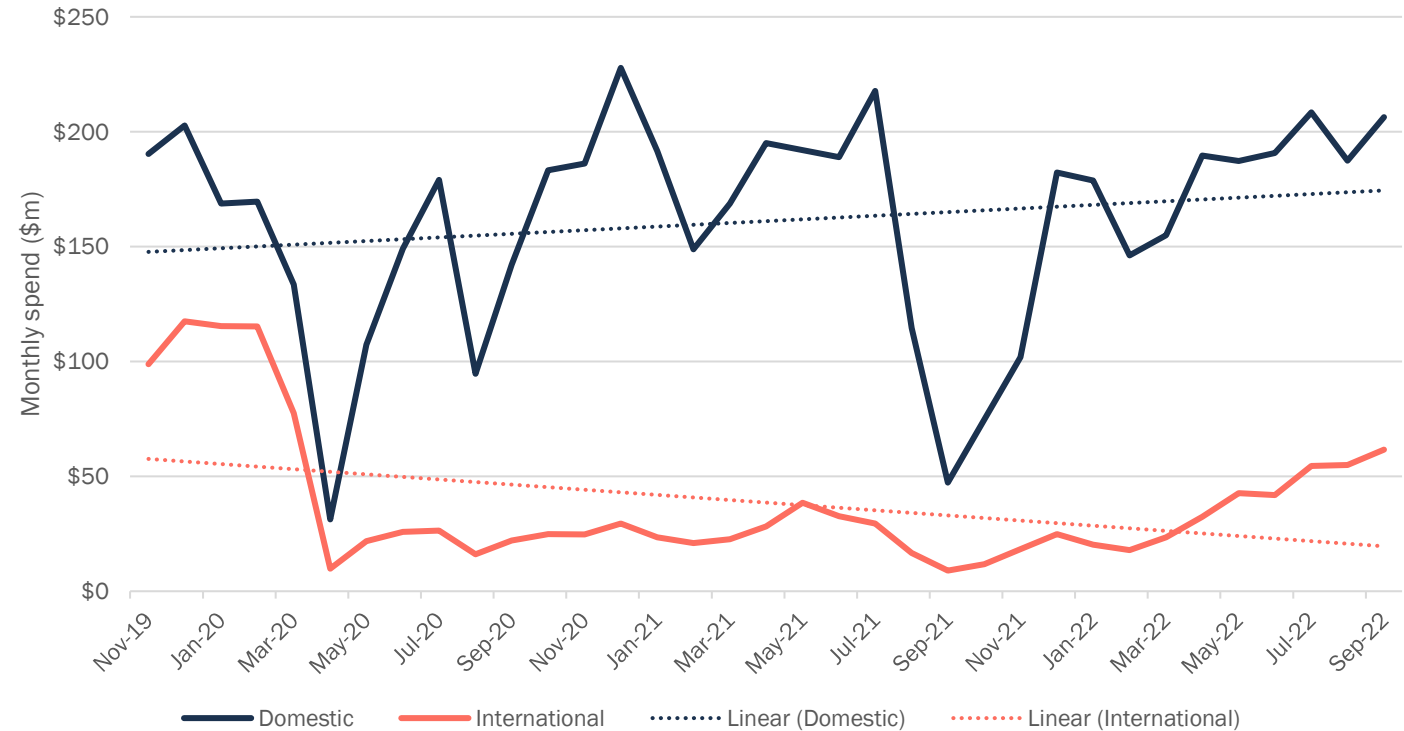


Auckland Tourism – Spend Data

\$2.01b in Domestic tourism transactions for YE September 2022

- Looking at the last 24 months, domestic tourism transactions fell in correlation with each of Auckland’s regional lockdowns i.e., in April and August 2020, and again in February 2021 and August through to September in 2021.
- In the year to **September 2022**, **Domestic tourism transactions** was **\$2.01b** (down 2.6%), while **International tourism transactions** was **\$0.41b**, up 34.5% for the year.
- 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

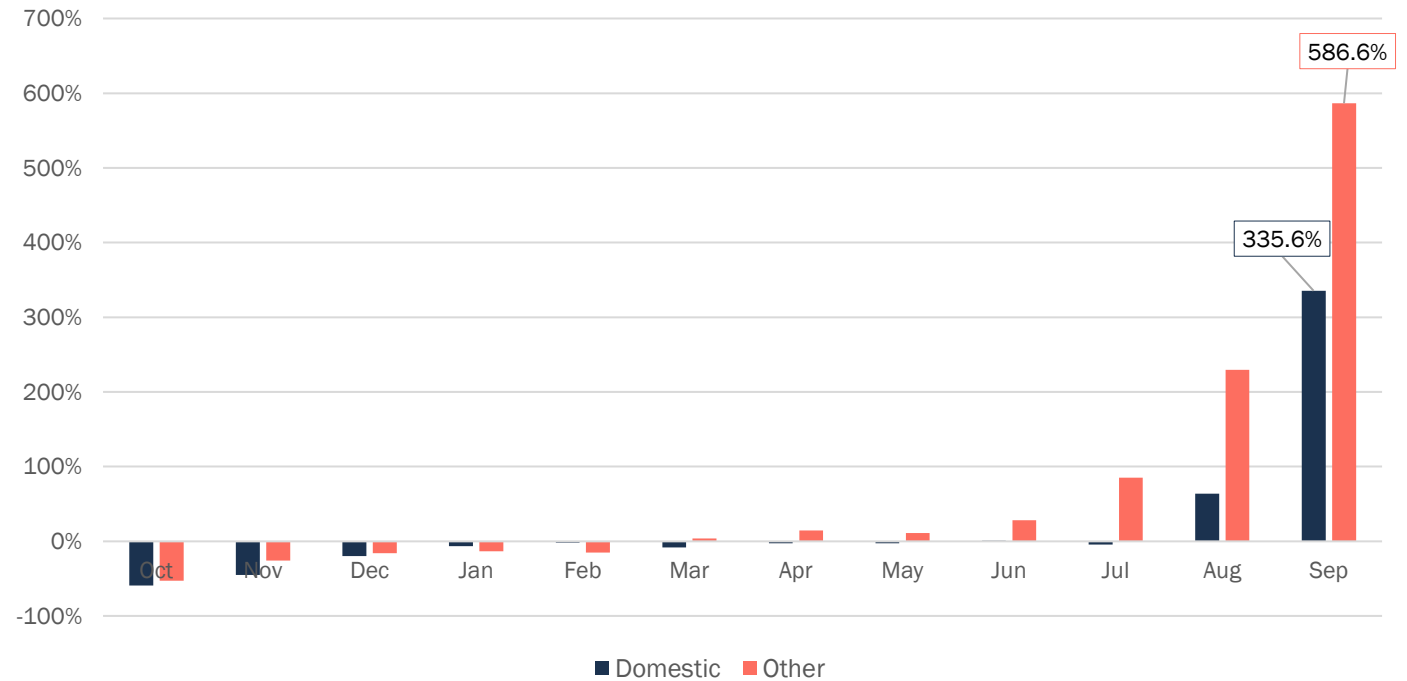


Tourism Transactions	YE September 2022 (\$b)	% change
Domestic	2.009	-2.6%
International	.405	34.5%

Domestic tourism transactions were \$206.4m for September 2022, up 335.6%

- For the month of September 2022, domestic tourism transactions (TECTs) was \$206.4m, up 335.6% compared with the same month in 2021.
- International tourism transactions in September 2022 was \$61.7m (up 586.6%) compared to September 2021.

Monthly % Change in tourism transactions in Auckland



Tourism Transactions	September 2022 (\$m)	% change
Domestic	206.4	335.6%
International	61.7	586.6%

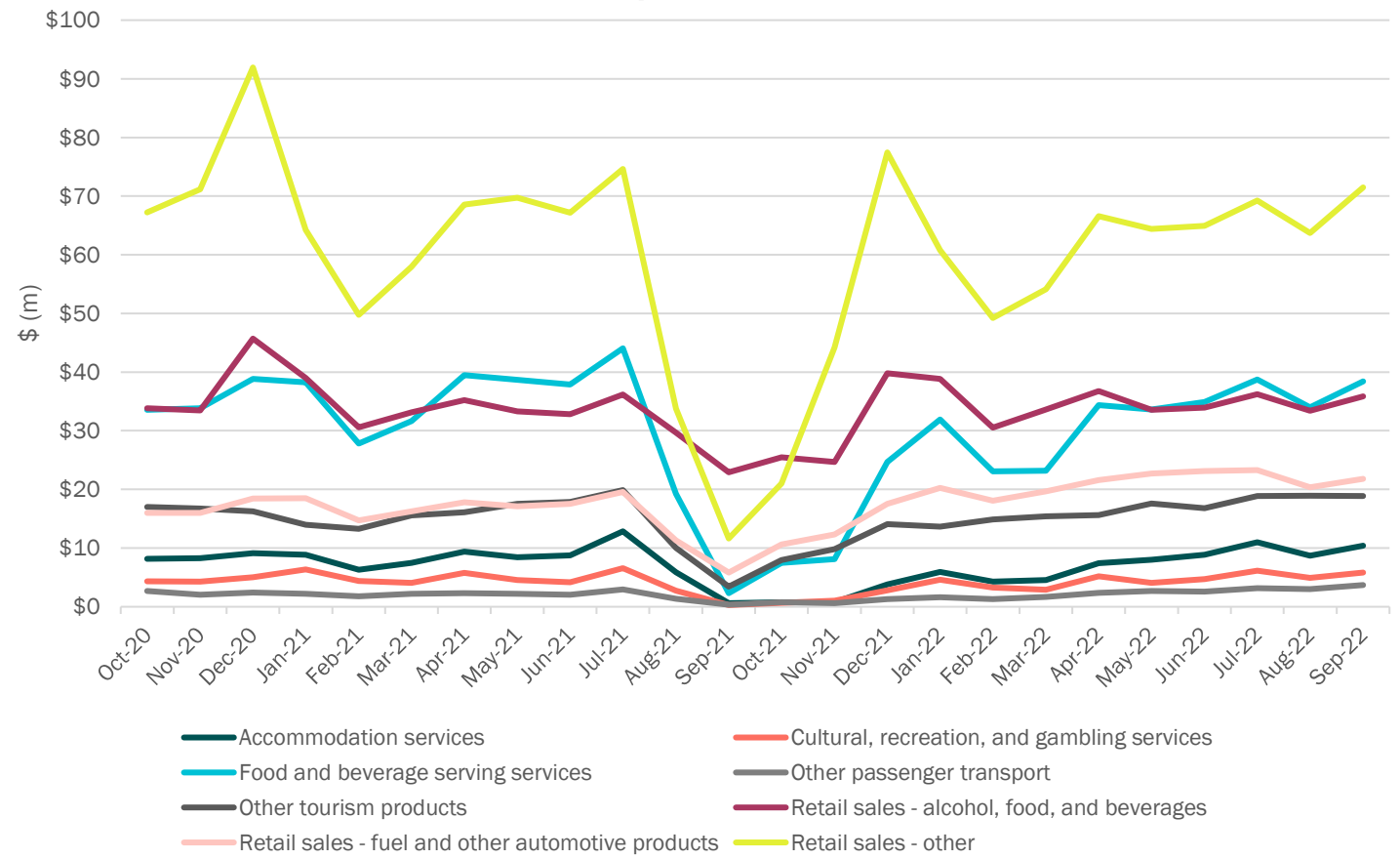
\$71.5m spent in Retail sales (other) by domestic visitors in September 2022, up 515.3%

	Spend (\$m)	% change
Accommodation services	10.4	1578.2%
Cultural, recreation, and gambling services	5.8	1954.1%
Food and beverage serving services	38.4	1578.4%
Other passenger transport	3.7	1069.5%
Other tourism products	18.9	438.1%
Retail sales - alcohol, food, and beverages	35.9	56.5%
Retail sales - fuel and other automotive products	21.8	273.7%
Retail sales - other	71.5	515.3%
Grand Total	206.4	335.6%

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Source: MBIE TECTs.

Domestic monthly tourism transactions in Auckland, by product



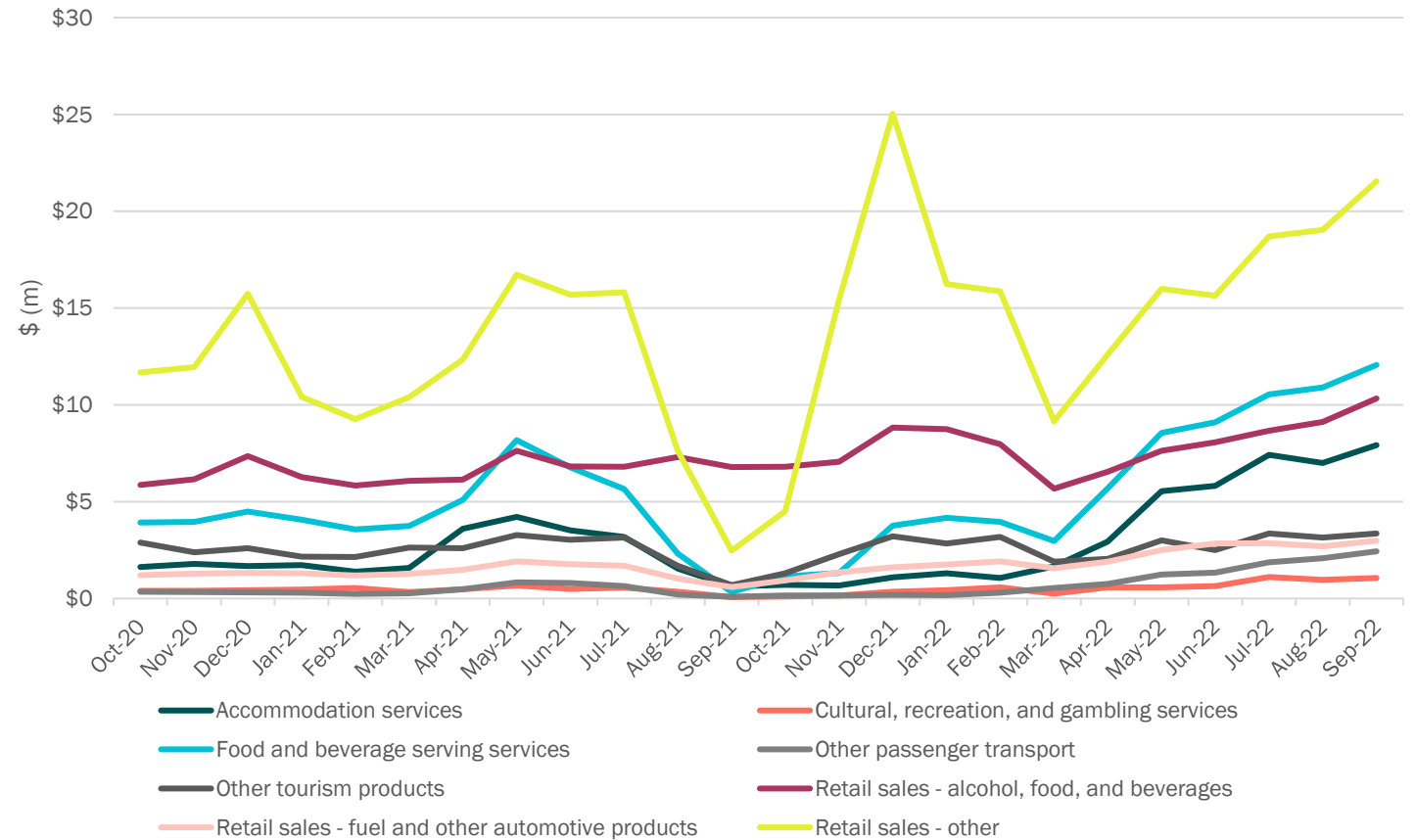
\$21.5m spent in Retail sales (other) by International visitors in September 2022 up 938.6%

	Spend (\$m)	% change
Accommodation services	7.9	1174.0%
Cultural, recreation, and gambling services	1.1	1665.5%
Food and beverage serving services	12.1	4782.6%
Other passenger transport	2.4	2817.0%
Other tourism products	3.4	464.2%
Retail sales - alcohol, food, and beverages	10.3	114.2%
Retail sales - fuel and other automotive products	3.0	517.6%
Retail sales - other	21.5	938.6%
Grand Total	61.7	586.6%

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Source: MBIE TECTs.

International monthly tourism transactions in Auckland, by product





Auckland Tourism – Major and Business Events Data

Major Events Insights



Event	Date	Venue	Interesting Findings
NBL Final 6 Week	10 – 13 September 2022	Eventfinda Stadium	<ul style="list-style-type: none"> There were 349.1k domestic guest nights in commercial accommodation (up 519.0%), and 116.6k international guest nights (up 1375.9%) in commercial accommodation in September 2022.
Auckland Writers Festival	23 – 28 September 2022	Various	<ul style="list-style-type: none"> ADR peaked on Saturday 10th September, while Occupancy and RevPAR peaked on Saturday 24th September 2022 (the night of the All Blacks vs Australia game at Eden Park).
All Blacks vs Australia	24 September 2022	Eden Park	<ul style="list-style-type: none"> Occupancy and RevPAR peaked on Saturday 24th September 2022.
World Rally Championships	28 September – 2 October 2022	Various	<ul style="list-style-type: none"> For the month of September 2022, domestic tourism transactions (TECTs) was \$206.4m, up 335.6% compared with the same month in 2021. International tourism transactions in September 2022 was \$61.7m (up 586.6%) compared to September 2021.

Business Events Insights



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Business events in Auckland
Q2 June 2022




18%

Auckland's market share of
business events
Q2 June 2022




41.7^k


Delegates hosted in Auckland
Q2 June 2022




22%

Auckland's market share of
delegates
Q2 June 2022




51.5^k

Delegate days hosted in Auckland
Q2 June 2022




19%

Auckland's market share of
delegate days
Q2 June 2022





Auckland Tourism – Tourism Sentiment Index


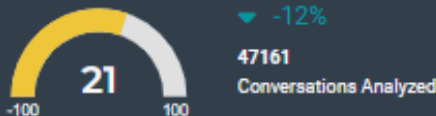
Tourism Sentiment Index (TSI)

- 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 September 2022 was +22 (+1pt to NZ), up 4 points to September 2021.
- Of all conversations online being driven by Auckland’s tourism experience or products, 24% of those conversations were identified as destination promoters.
- This includes 5,116 online conversations about Auckland (down 10%), while 47,161 online conversations were included for NZ (down 12%%).
- 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.
- The general emotional tone of online conversations was ‘Joy’ for both Auckland and NZ.
- Topics that drove positive sentiment for Auckland were ‘ Restaurant, Dining, and Takeaway’ and ‘Beaches’, while negative sentiment was also driven by ‘Air Travel’ and ‘Natural Disaster’.

KEY PERFORMANCE INDICATORS	AUCKLAND	NEW ZEALAND
Tourism Sentiment Score® ⓘ	 <p>22 -100 100 5116 Conversations Analyzed</p>	 <p>21 -100 100 47161 Conversations Analyzed</p>
Global Tourism Sentiment Comparison ⓘ	AVERAGE	AVERAGE
Emotional Tone of Conversation ⓘ	Joy	Joy
Topics Driving Positive Sentiment ⓘ	Restaurant / Dining / Takeaway Beaches	Beaches Restaurant / Dining / Takeaway
Topics Driving Negative Sentiment ⓘ	Air Travel Natural Disaster	Natural Disaster Air Travel

TSI Categories



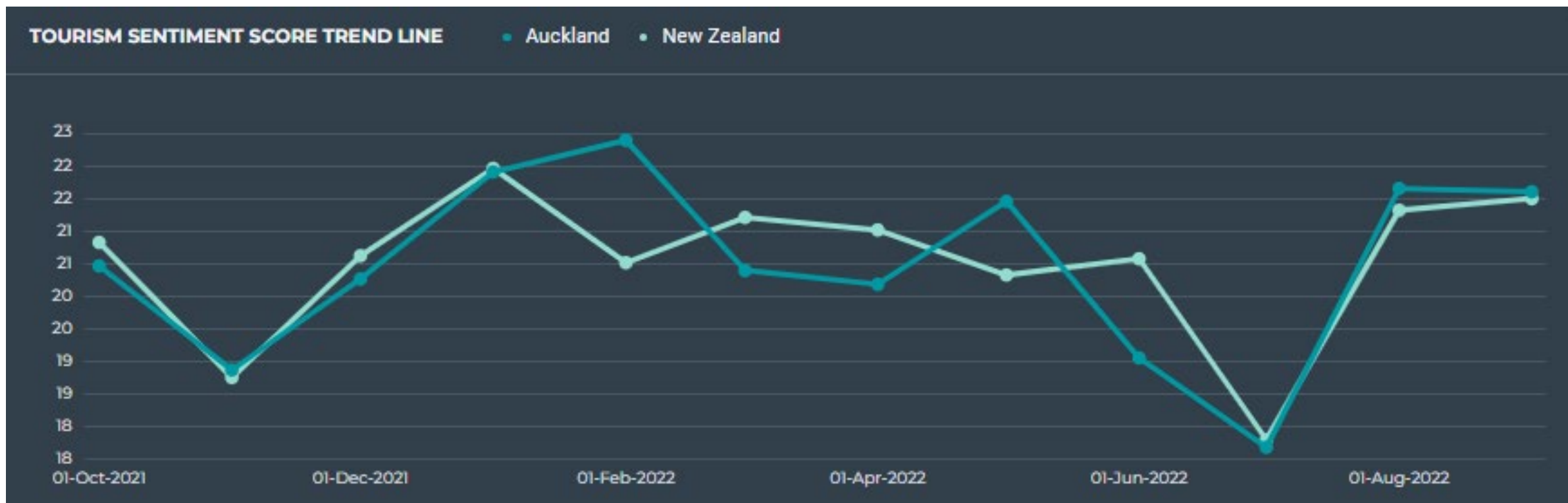
- Volume is a good indicator of overall awareness. The more people are talking about a specific experience, the more awareness it drives. The top drivers for conversation about Auckland for September 2022 were Access and Transportation (27%), followed by Food and Culinary (18%), and Outdoor Activities (18%).
- The category with the highest sentiment was Food and Culinary (29), followed by Relaxation and Wellness (27), and Outdoor Activities (26), while Safety (-4), and Access and Transportation (7) had the lowest sentiment.
- Sub-categories that drove positive sentiment were Fishing (50), Weddings (44), Farmers Markets and Food Producers (42), and Winery and Vineyards (41).
- The lowest sentiment was recorded in Natural Disaster (-5), Skiing and Snowboarding (-2), Sailing and Yachts (2) and Health (3).
- Auckland sentiment was higher Relaxation and Wellness (+5), and Food and Culinary (+3) in comparison to NZ.
- Joy was the general emotional tone for almost all categories for the month of September 2022, with anger being linked to Access and Transportation and Fear to Safety.

CATEGORIES	AUCKLAND			NEW ZEALAND		
	Volume	Emotion	Sentiment	Volume	Emotion	Sentiment
▲ Access + Transportation	27% ▲ 1%	Anger	7 Average	16% ▲ 0%	Anger	9 Average
▲ Outdoor Activities	18% ▲ 0%	Joy	26 Average	27% ▲ 2%	Joy	26 Average
▲ Food + Culinary	18% ▼ 2%	Joy	29 Average	14% ▼ 2%	Joy	26 Average
▲ Relaxation + Wellness	11% ▲ 2%	Joy	27 Average	10% ▲ 1%	Joy	22 Average
▲ Amenities + Entertainment	11% ▼ 1%	Joy	25 Average	12% ▲ 0%	Joy	25 Average
▲ Destination Services	7% ▲ 0%	Joy	19 Average	9% ▲ 1%	Joy	21 Average
▲ Culture + History	6% ▲ 1%	Joy	15 Average	6% ▲ 0%	Joy	20 Average
▲ Safety	3% ▲ 0%	Fear	-4 Average	7% ▼ 2%	Fear	-1 Average

Tourism Sentiment Index Score Trends



- The Tourism Sentiment Index (TSI) Score trend line for Auckland has fluctuated from 1st October 2021 to 30th September 2022.
- Auckland’s TSI increased in October 2021 but fell in November 2021. TSI lifted from December 2021 onwards - peaking in February 2022 but dropped in March-April 2022.
- TSI rebounded in May but declined in June-July 2022. Tourism Sentiment (for both Auckland and NZ) lifted in the month of August and has held steady in September 2022.





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%

DETRACTORS

29%

TOTAL NPS

1

YE June 2022

-3

Compared to
YE June 2021

YE June 2022

+3

Compared to
YE June 2021

YE June 2022

-6

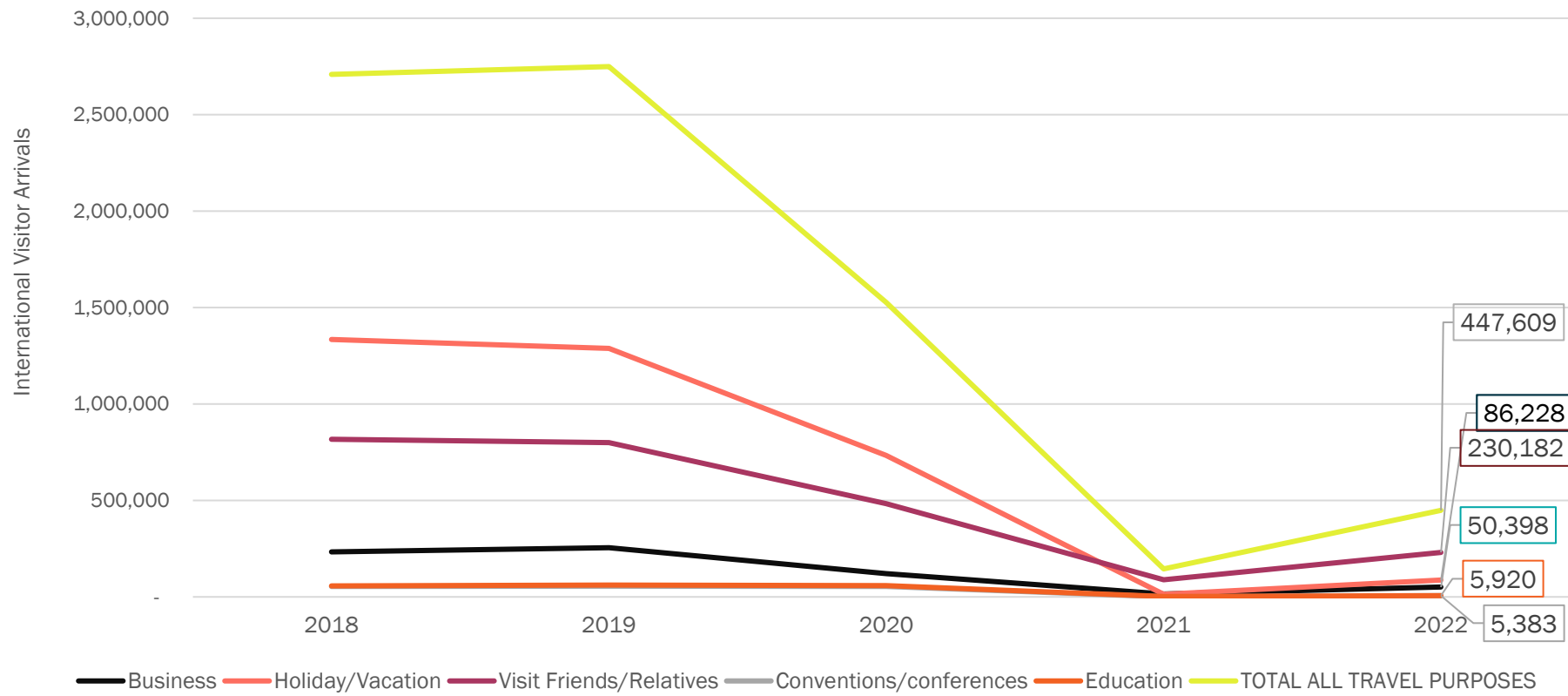
Compared to
YE June 2021

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



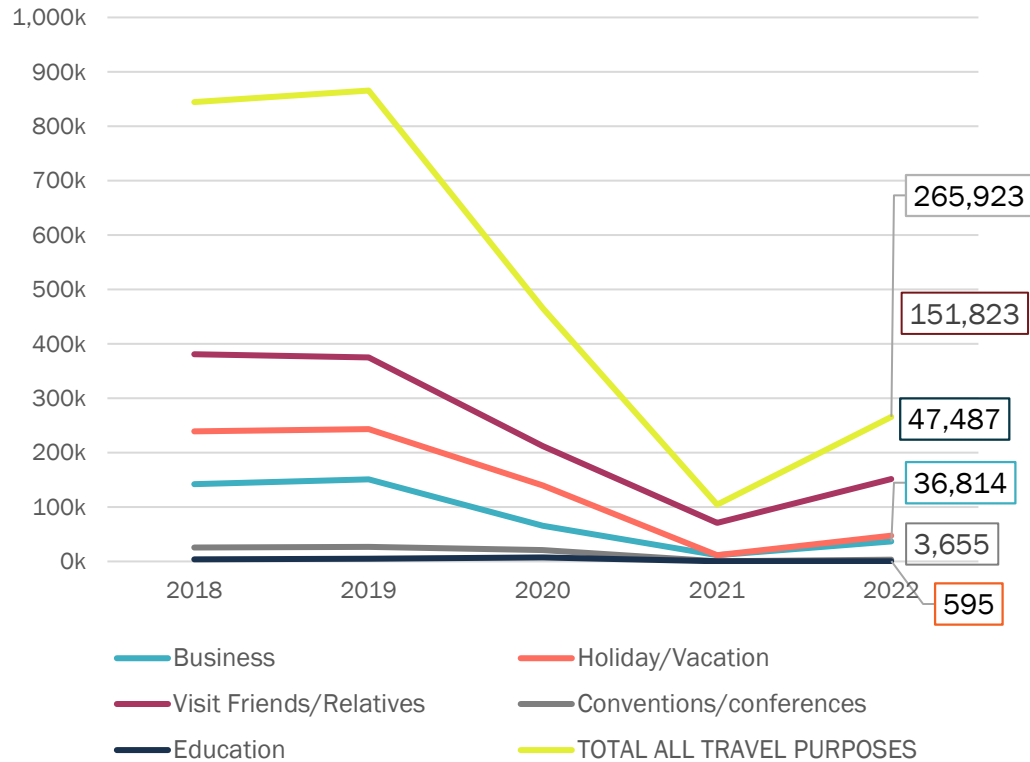
Five-year trends in key markets

Five-year visitor arrivals to Auckland, YE September

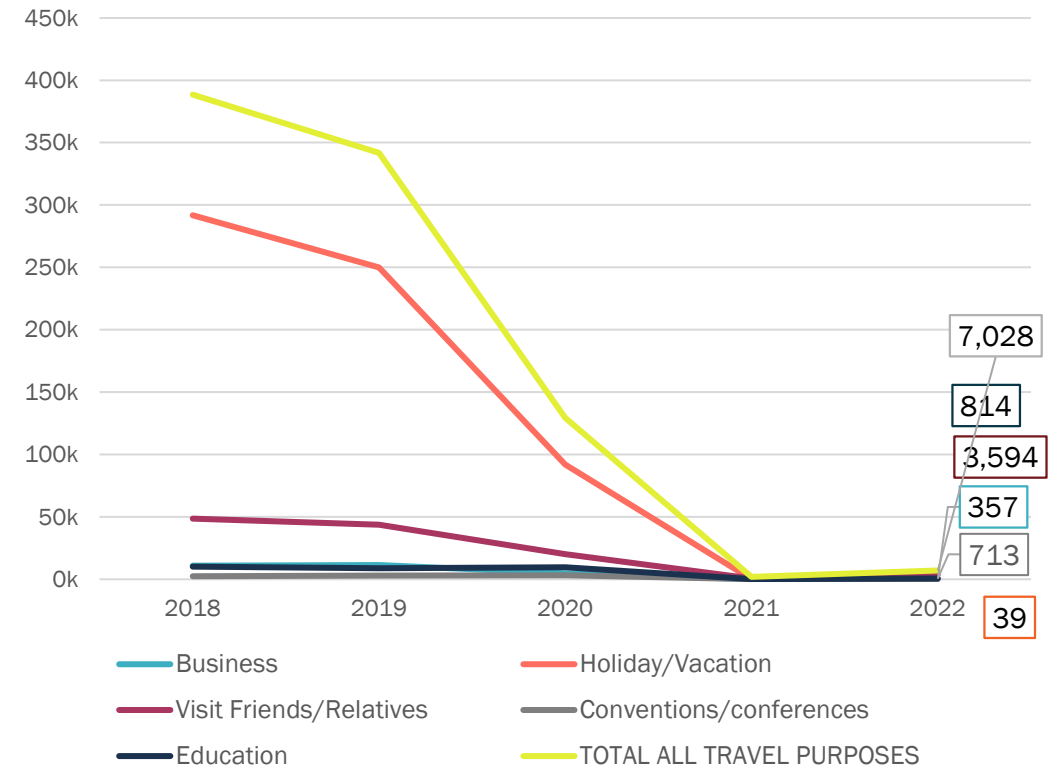


Five-year visitor arrivals to Auckland, YE September

Australia

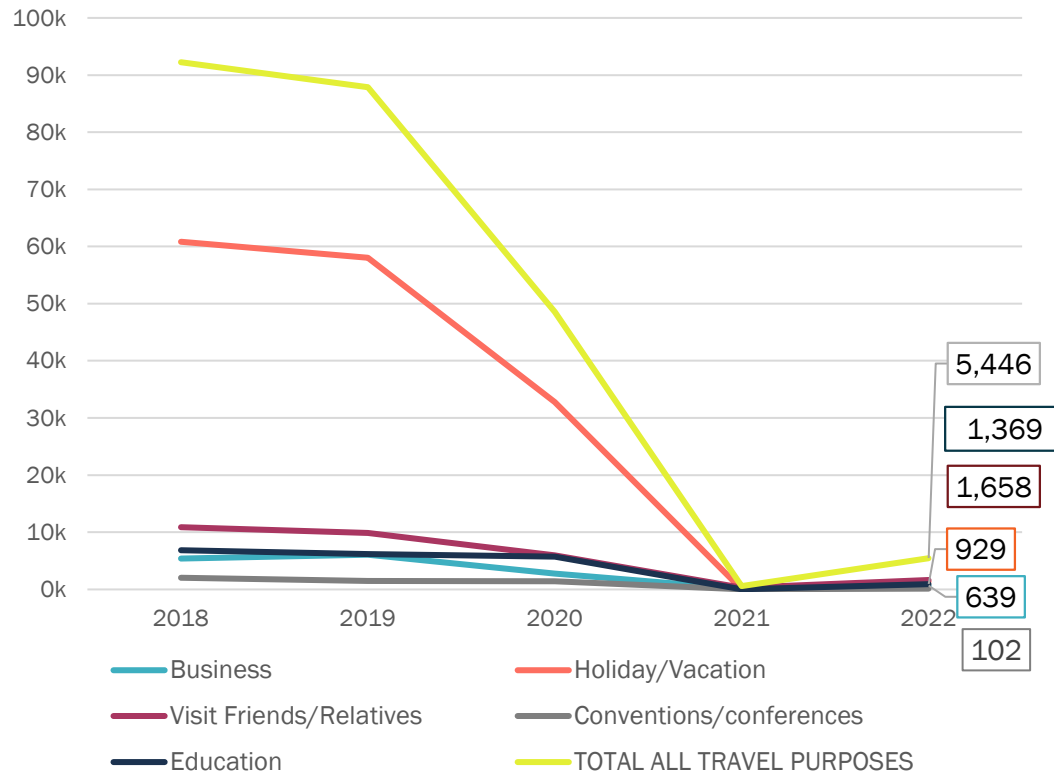


China

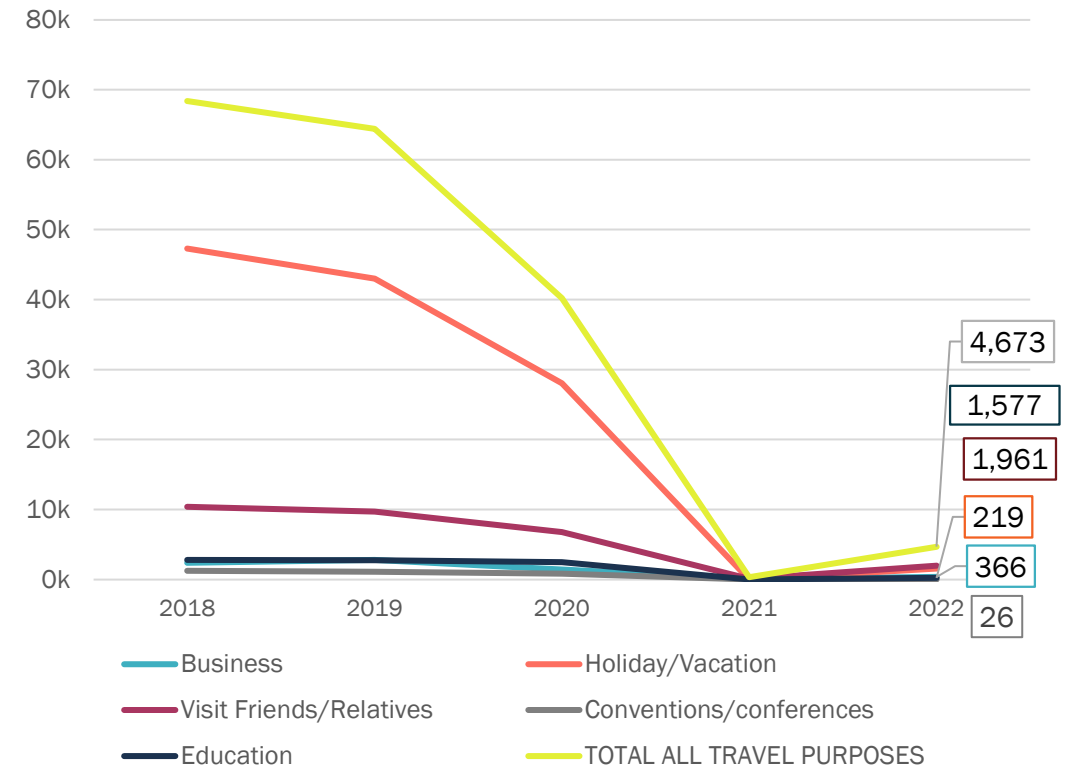


Five-year visitor arrivals to Auckland, YE September

Japan

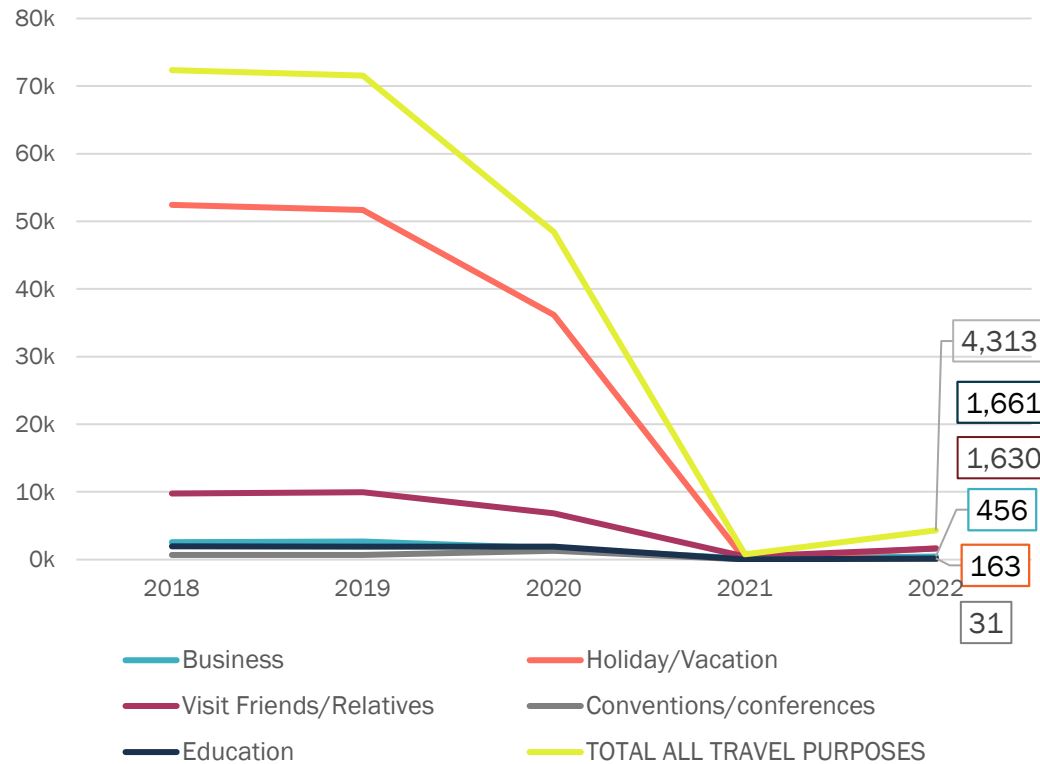


Korea

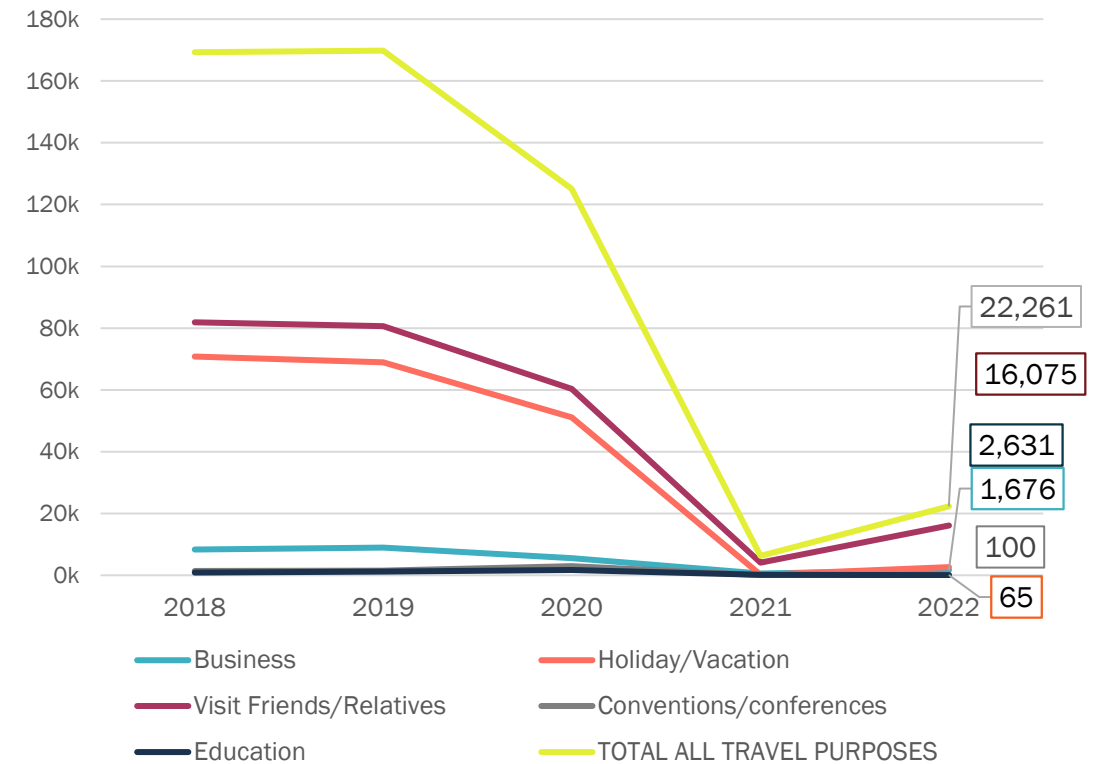


Five-year visitor arrivals to Auckland, YE September

Germany

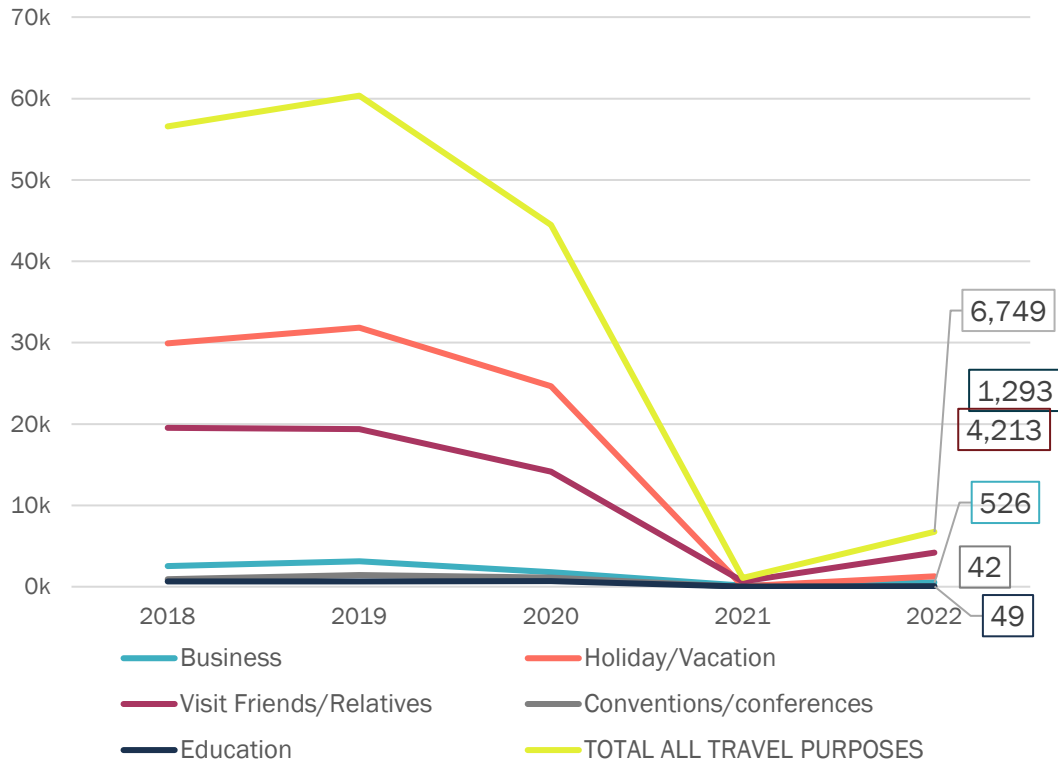


UK

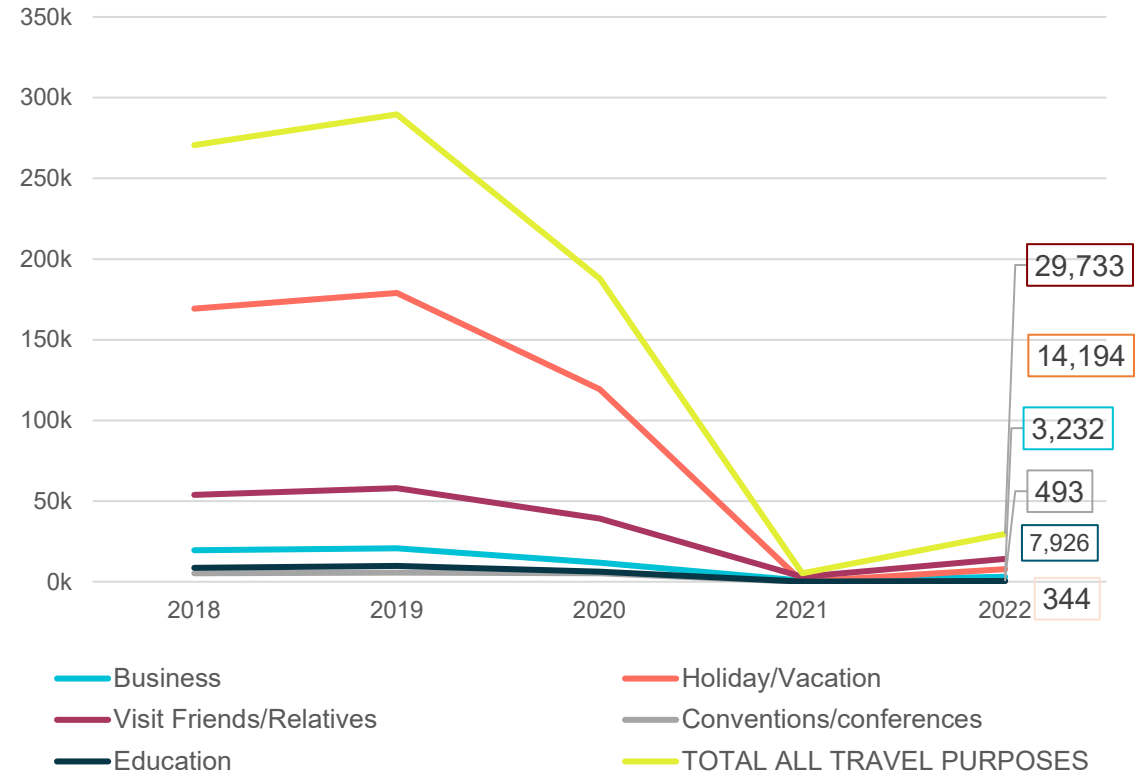


Five-year visitor arrivals to Auckland, YE September

Canada



US



A person wearing a red shirt is seated at a wooden table. In front of them is a glass of red wine and several bowls of food. The bowls contain various dishes, including what appears to be a salad with green vegetables, a bowl of yellow food with red garnishes, and a bowl of pink food with yellow garnishes. The scene is set in a restaurant or dining area.

Ngā mihi Thank you

- KEY CONTACT

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