

Tamaki Nakaurau Augkland Destination Overview

June 2024

243

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

Prepared August 2024 By Chris Gleeson, Research & Insights

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Contents

KEY FINDINGS	3
VISITOR ARRIVALS DATA	
INTERNATIONAL VISITORS	5
REASON FOR VISIT MARKET	6 - 10
AUCKLAND VS. OTHER PORTS	11
ACCOMMODATION DATA	
COMMERCIAL GUEST NIGHTS TYPE	13 - 14
ADR, HOTEL OCCUPANCY AND REVPAR	15 - 16
AVERAGE LENGTH OF STAY	17
FORWARD BOOKING DATA	18
FORECAST ACCOMMODATION DATA	19 - 21
SPEND DATA	
INTERNATIONAL & DOMESTIC TOURISM SPEND DATA	23-29
MAJOR & BUSINESS EVENTS DATA	
MAJOR EVENTS INSIGHTS	31 - 32
BUSINESS EVENTS INSIGHTS	34 - 38
AUCKLAND VISITOR SURVEY	
VISITOR EXPERIENCE & NET PROMOTER SCORE	40 - 41
FIVE YEAR TRENDS IN KEY MARKETS	
REASON FOR VISIT BY MARKET	43-47







INTERNATIONAL

- Monthly international visitors (125.3k) were up 4.2% on June 2023 (120.2k).
- The year to June 2024 saw 2.22m international visitor arrivals, an increase of 29.4% on the previous year. International visitation was also up 9.3% compared to 2020 levels (2.03m in YE June 2020).
- There was an increase in Australian visitors in the month of June 2024, with 51.3k visitors, up 6.9% compared to last June. The year to June 2024 saw 708.6k Australian visitor arrivals, up 4.8%.
- Holiday visitors (932.2k) contributed the most to annual visitor numbers and increased 55.6% on the year to June 2023. Monthly holiday numbers (43.6k) were also up 11.5% compared with the month of June 2023.
- VFR visitors (755.2k) were up 7.5% for the year, with monthly numbers (46.0k) down 2.3%.
- 160.9k international guest nights in commercial accommodation for June, up 1.0% on last year.
- International tourism spend in June 2024 was \$68.8m (up 9.0%) compared to June 2023.

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 304.9k domestic guest nights in commercial accommodation for the month of June, down 13.7%.
- Tourism Electronic Card Transactions (TECTs) has now restarted as an interim replacement to the Monthly Regional tourism Estimates (MRTEs). However, due to a different methodology, the TECT figures are substantially smaller than those of the previous MRTEs, so the two series should not be compared.
- Domestic tourism spend in June 2024 was 183.9m (down 6.2% compared to June 2023).

OVERALL

- For the month of June 2024, there were 465.8k total guest nights in commercial accommodation in Auckland, down 9.1% on the same month last year.
- On average, visitors stayed in Auckland for 2.0 nights for the month of June 2024 (down 4.8% on the previous year).
- Average hotel Occupancy for the month was 55.9%, 12.2% lower compared to June 2023.
- The Average Daily Rate for June was \$192 (down 8.7%) and the RevPAR was \$108 (down 19.7% compared to the previous year).
- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Saturday 29th June 2024 at \$200 (down 4.0% on the previous year).
- Looking forward (over the next three months), overall occupancy on the books is generally similar for the period from August to November 2024 in comparison to last year.
- Occupancy on the book's peaks at 77% on Friday 15th November 2024, coinciding with Coldplay performing at Eden Park (November 13th, 15th - 16th). Friday 8th of November also reaches 66% occupancy on the books, coinciding with Pearl Jam performing at Go Media Stadium (November 8th, 10th).

Auckland Tourism – Visitor Arrivals Data

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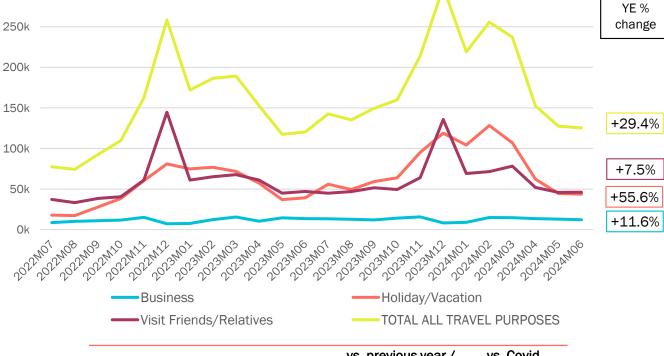
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2.22m International visitor arrivals in the year to June 2024, up 29.4%

- The month of June saw 125.3k international visitors, up 4.2% on June 2023 (120.2k).
- The year to June 2024 saw 2.22m international visitor arrivals, an increase of 29.4% on the previous year. International visitation was also up 9.3% compared to 2020 levels (2.03m in YE June 2020).
- Holiday visitors (932.2k) contributed the most to annual visitor numbers and increased 55.6% on the year to June 2023. Monthly holiday numbers (43.6k) were also up 11.5% compared with the month of June 2023.
- VFR visitors (755.2k) were up 7.5% for the year, with monthly numbers (46.0k) down 2.3%.
- There were 153.6k business visitors (up 11.6%) in the year to June 2024, and 12.2k for the month (down 9.3%).

International visitor arrivals in Auckland, reason for visit 350k 300k 250k 200k



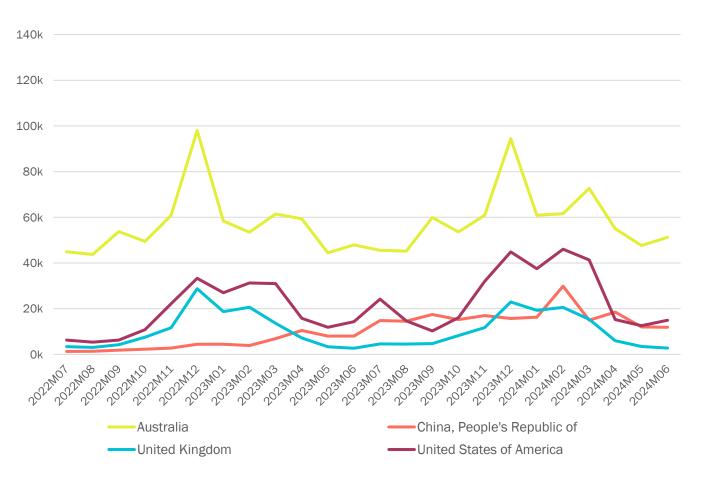
	Visitor arrivals	vs. previous year / YE	vs. Covid lockdown/ 2020
June 2024	125,340	4.2%	3599.5%
YE June 2024	2,216,657	29.4%	9.3%

Source: ITM data, Statistics NZ *Nb. International visitor arrival data captures every arrival to Auckland airport which is the gateway port for New Zealand. This does not mean the visitor arrival stayed in or visited Auckland.



708.6k visitors from Australia for YE June 2024, up 4.8%

- There was an increase in Australian visitors in the month of June 2024, with 51.3k visitors, up 6.9% compared to last June. The year to June 2024 saw 708.6k Australian visitor arrivals, up 4.8%.
- The year to June 2024 saw 309.6k visitors from the US (up 43.7%), with 15.0k visitors for the month (up 4.5%).
- Visitors from China (198.3k) were also up for the year (256.2%), and up (47.7%) for the month of June (to 11.9k).
- For the year to June 2024, there were 124.3k visitor arrivals from the UK (down 0.3%) and 2.7k visitors for the month (up 1.0%).



Visitor arrivals in Auckland by key international markets

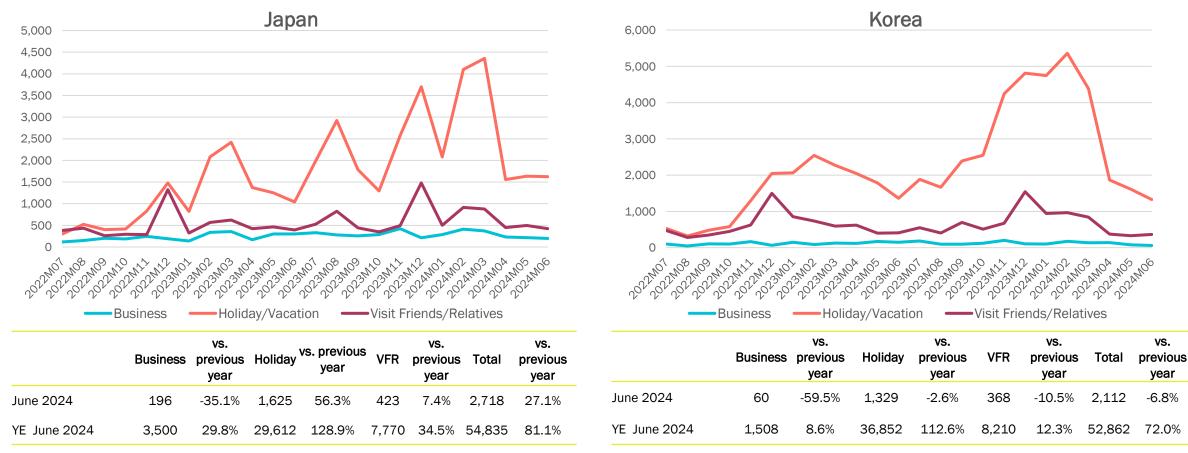


24-month visitor arrivals from individual markets





24-month visitor arrivals from individual markets

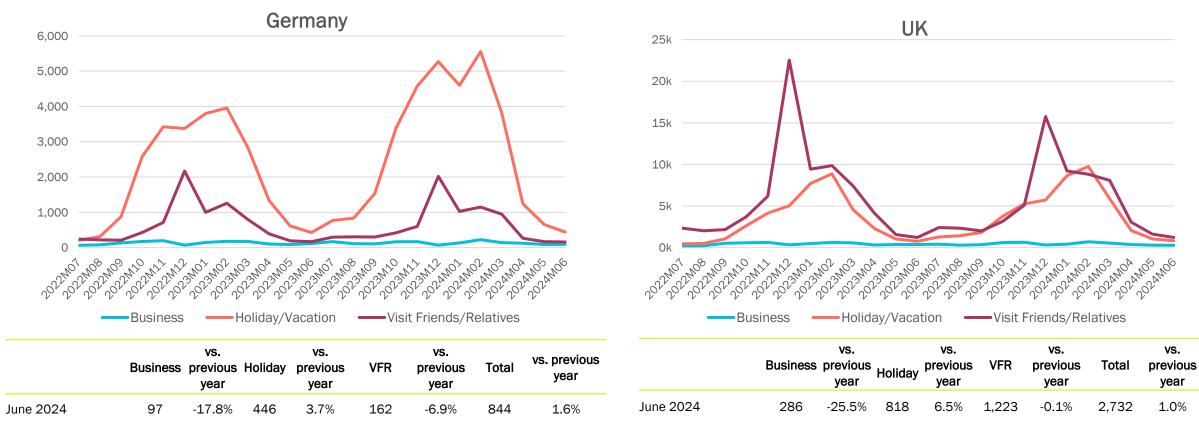




-0.3%

-0.5% 47.605 21.7% 62,896 -13.4% 124,288

24-month visitor arrivals from individual markets



YE June 2024

5.345

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YE June 2024

1,627

4.7%

32,699

37.7%

7,687

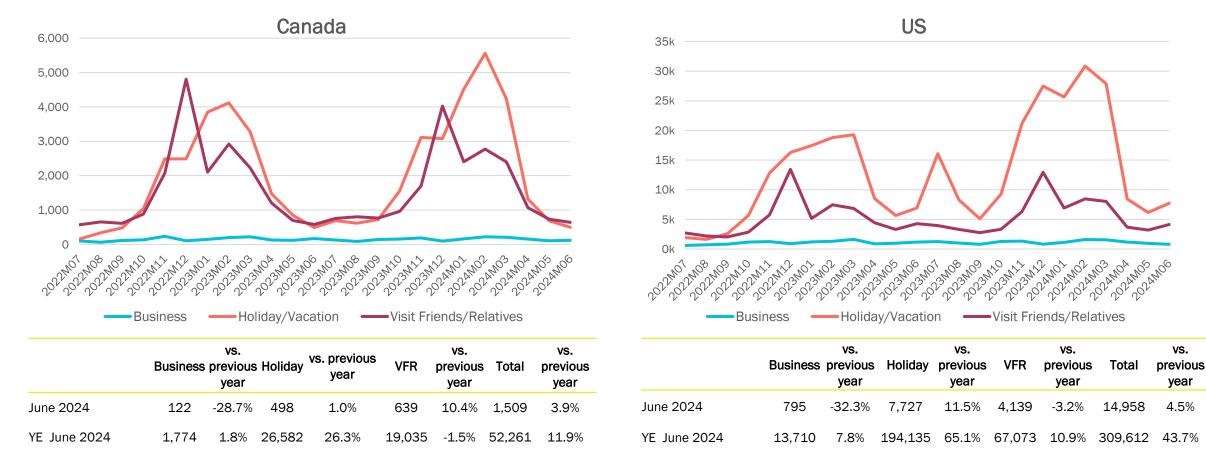
-1.7%

46,946

27.5%



24-month visitor arrivals from individual markets

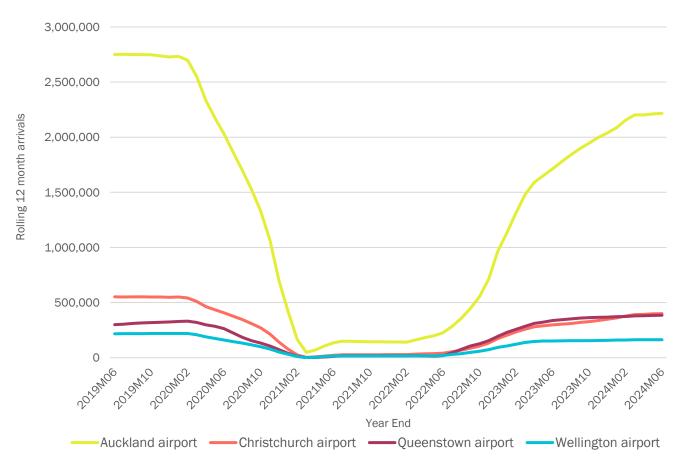




Auckland has seen a 29.4% increase in international visitor arrivals over the last year

- 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.
- Auckland has again seen increasing arrivals since the borders fully opened in July 2022 and an 29.4% increase in international visitor arrivals over the last year.
- For the year ending June 2024, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 14.4%, Christchurch was up 34.0% and Wellington was up 7.8% compared to last year.

12 month rolling visitor arrivals



Berth . 11 THE PARTY NAME IN HSBC (X) MINITER CONTRACTOR OF CONTRACTOR TATEACHTER STATEACHTERS. TOWER *************** **Auckland Tourism – Accommodation Data**



465.8k total guest nights in commercial accommodation in June 2024, down 9.1%

- For the month of June 2024, there were **465.8k total guest nights** in **commercial accommodation in Auckland, down 9.1%** on the same month last year.
- There were 304.9k domestic guest nights in commercial accommodation (down 13.7%), and 160.9k international guest nights (up 1.0%) in commercial accommodation in June 2024.
- For New Zealand overall, there were 2.20m guest nights in commercial accommodation in June 2024, down 3.5% compared to June 2023.

Guest nights in commercial accommodation - Auckland



Domestic guest nights

International guest nights

June 2024	Auckland	% change	New Zealand	% change
Total guest nights	465,800	-9.1%	2,195,700	-3.5%
Domestic guest nights	304,900	-13.7%	1,616,800	-4.3%
International guest nights	160,900	1.0%	578,900	-1.3%

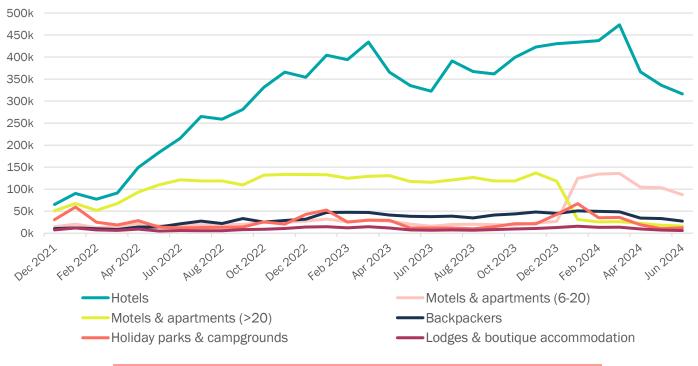


316.3k guest nights in hotels in June 2024, down 1.9%

- For the month of June 2024, there were **316.3k guest nights** in hotels in Auckland, down **1.9%** compared to June last year.
- There were 87.5k guest nights in motels and apartments (6-20), up 453.8% on the previous year.
- However, guest nights in motels and apartments (>20) (16.2k) were down (86.0%).
- Guest nights in holiday parks and campgrounds (12.1k) were up (1.7%) for the month of June.
- Guest nights in backpacker accommodation decreased (down 27.0% to 27.6k) in June 2024.
- Guest nights in lodges and boutique accommodation were down (11.8% to 6.0k) for the month.

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Guest nights by accommodation type (monthly)



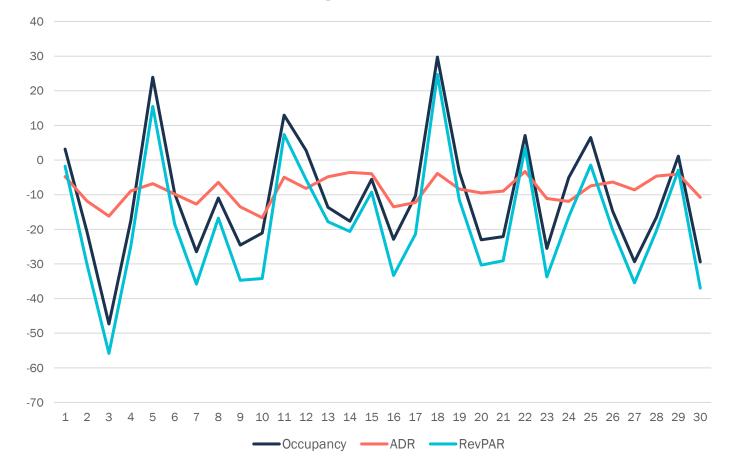
Jun-24	Auckland	% change
Hotels	316,300	-1.9%
Motels & apartments (6-20)	87,500	453.8%
Motels & apartments (>20)	16,200	-86.0%
Backpackers	27,600	-27.0%
Holiday parks & campgrounds	12,100	1.7%
Lodges & boutique accommodation	6,000	-11.8%



Average Occupancy for June 2024 was 55.9%, down 12.2% on 2023

- For the month of June 2024, the average Occupancy was **55.9%**, **12.2%** lower compared to June 2023.
- The Average Daily Rate (ADR) for the month was \$192, down 8.7% on last year.
- Monthly Revenue per available room (RevPAR) for June was \$108, 19.7% lower compared to last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in June 2024.
- Percentage changes for Occupancy and RevPAR both peaked on Tuesday 18th June while ADR peaked on Saturday 22nd June.

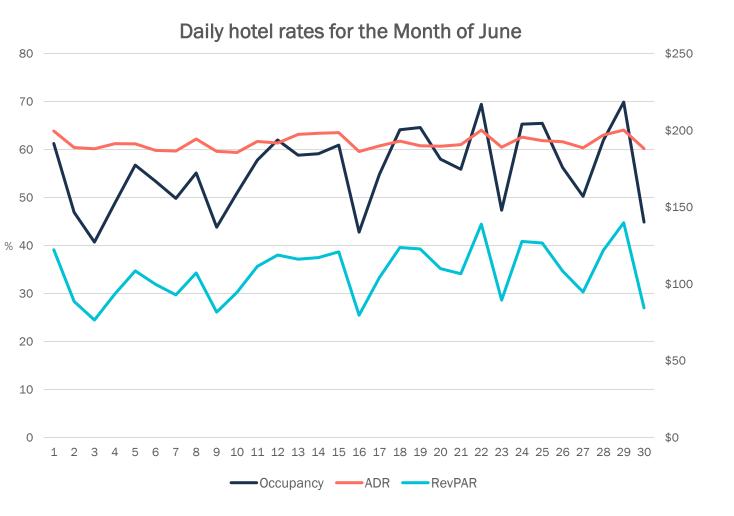
Percent Changes for the Month of June





Average daily rate was \$200 on 29th June 2024, down 4.0% on 2023

- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Saturday 29th June 2024 at \$200 (down 4.0% on the previous year).
- Hotel occupancy reached 69.9% on Saturday 29th June 2024 (up 1.1% on the previous year).
- Revenue per available room (RevPAR) peaked to \$140 also on Saturday 29th June 2024. This was down 2.9% in comparison to last year.

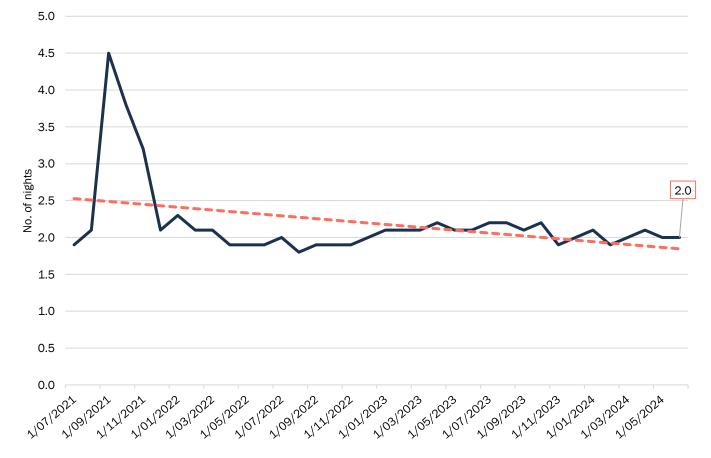




On average, visitors stayed 2.0 nights in Auckland for the month of June 2024

- On average, visitors stayed in Auckland for 2.0 nights for the month of June 2024 (down 4.8% on the previous year).
- There has been a slight downward trend in average length of stay for visitors to Auckland over the last three years.

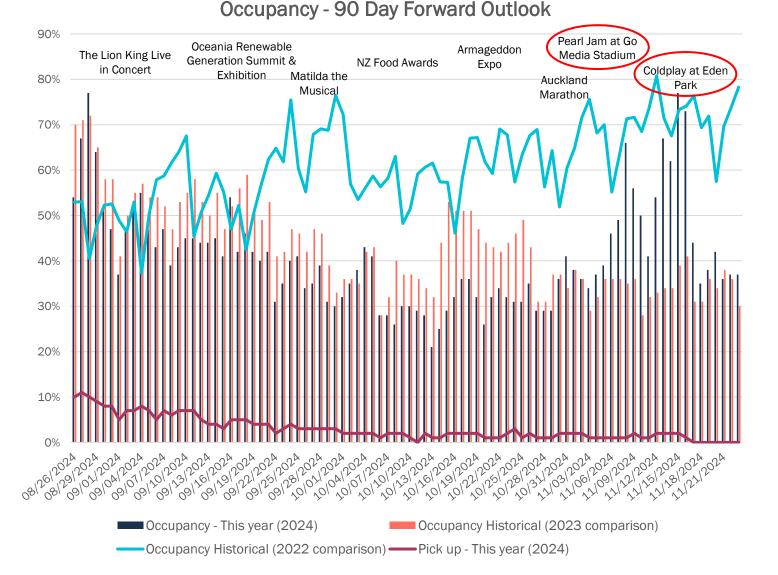
Average length of stay for visitors to Auckland





90 Day Forward Booking Occupancy Data

- Looking forward (over the next three months), overall occupancy on the books is generally similar for the period from August to November 2024 in comparison to last year, with a period of YoY uplift in mid-November.
- There is considerable variance in hotel occupancy when comparing the next three months of 2024 to last year.
- Occupancy on the book's peaks at 77% on Friday 15th November 2024, with Saturday 16th November also reaching 73% occupancy on the books. These dates coincide with Coldplay performing at Eden Park (November 13th, 15th - 16th).
- Other dates with high occupancy on the books include Friday November 8th with 66% and Sunday November 10th with 50%. These dates coincide with Pearl Jam performing at Go Media Stadium (November 8th,10th).





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 2024 Q2 supply expanded 5.5%. Demand declined -3.6%, resulting in an occupancy decline of -8.5%. Occupancy is expected to decline by -9.1% in 2024 Q3, with supply expanding 6.3% and demand declining -3.4%.
- After expanding 33.3% in 2023, occupancy is expected to decline -3.4% in 2024. ADR is expected to decrease -1.9%, resulting in RevPAR decline of -5.2% in 2024. RevPAR is expected to grow by 8.2% in 2025.

50% 40%

30%

20%

10% 0% -10% -20% -30% -40%

2021

2022

2020

 Over the next three years, occupancy is expected to expand at an average annual rate of 1.4%, while ADR is expected to expand at an average annual rate of 0.8%.

Supply and Demand Growth



RevPAR Growth Composition

■ Occupancy ■ ADR

2024

2025

2026

2027

2028

2023



16.3k average daily rooms available in 2024, with 16.8k rooms forecast for 2025

- In 2024, on average there were 16.3k daily rooms available in Auckland. The number of average daily rooms available is set to increase by 5.7%, which will supply an additional 885 rooms (compared to 2023).
- Looking to 2025, average room supply is expected to expand 3.3%, supplying 533 new rooms and bringing the total number of rooms to 16.8k.
- Observing rooms by phase data, there was a total of 18.4k rooms (from 225 properties) in the pipeline.
- This comprised of 16.2k existing rooms (from 213 properties, 1.5k rooms under construction (from 8 properties), and 654 rooms in the planning stages (from 4 properties).

	Year	Rooms	% Chg.	Chg.		
	2020	14,173	2.0%	281		
	2021	14,932	5.4%	759		
Actual	2022	15,302	2.5%	370		
	2023	15,397	0.6%	95		
	2024	16,282	5.7%	885		
	2025	16,815	3.3%	533		
Forecast	2026	17,127	1.9%	313		
	2027	17,360	1.4%	233		
	2028	17.619	1.5%	260		



Source: STR Global Forecast (August 2024) * issued 4 times per annum



In total, 3.58m visitors are projected to visit New Zealand in YE June 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 13.7% from 2025 to 2028 (for Q2 2024), resulting in a possible 3.58m international visitors by YE June 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 2.6%. 1.44m Australian visitors are expected to visit New Zealand in the year to June 2028 (bringing visitation close to pre-Covid levels of 1.49m in 2020).

4,000k 3,500k 3,000k 2,500k 1,500k 1,000k 500k

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.

2021

2022

2023

2024

2025

2026

2027

2028

0k

2020

Auckland Tourism- Spend Data

20

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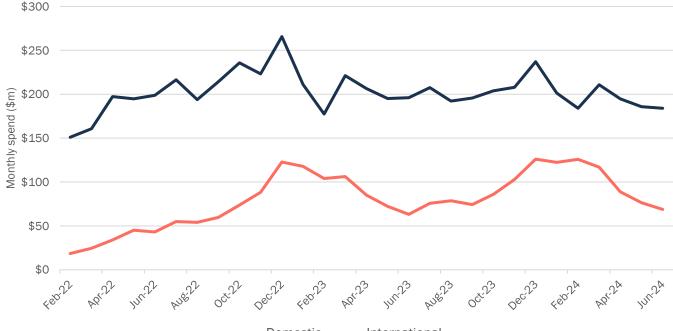


\$2.405b in Domestic tourism spend for yearend June 2024, down 5.9%

- Tourism Electronic Card Transactions (TECTs) has now restarted as an interim replacement to the Monthly Regional Tourism Estimates (MRTEs).
- Due to a different methodology, the TECT figures are report. More information on (TECTs) can be found <u>here</u>. substantially smaller than those of the previous MRTEs, so the two series should not be compared.
- Due to limitations of the new data collection method, domestic and international market totals will not be added together and will only be used separately. Additionally, only data dating back to January 2022 will be used for the purposes of this
- In the year to June 2024, domestic tourism spend in Auckland was \$2.405b, down 5.9% on last year.
- International spend was \$1.143b, up 14.1% for the year.

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-Domestic ---International

Tourism Transactions	YE June 2024 (\$b)	YE % change	
Domestic	2.405	-5.9%	
International	1.143	14.1%	



Total Domestic tourism spend was \$183.9m for June 2024, down 6.2%

- For the month of June 2024, domestic tourism spend (TECTs) was \$183.9m (down 6.2%) compared to the same month in 2023.
- International tourism spend in June 2024 was \$68.8m (up 9.0%) compared to June 2023.

Monthly % Change in tourism transactions in Auckland





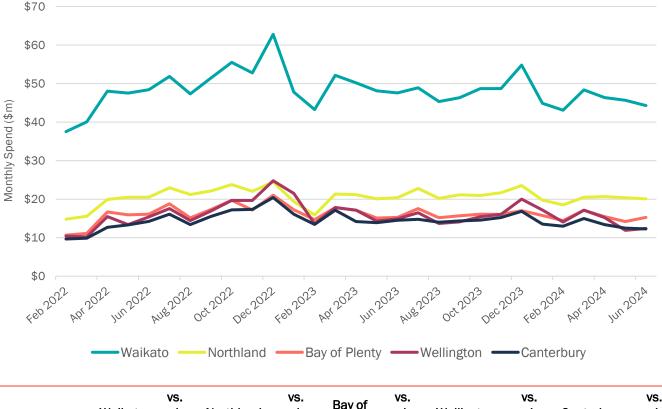
Tourism Transactions	June 2024 (\$m)	% change
Domestic	183.9	-6.2%
International	68.8	9.0%



Waikato visitors spent \$44.3m in June 2024, down 6.9% on the previous year

- For the month of June 2024, tourism spend was down across all domestic markets compared to the same month last year.
- Spend from Waikato-based visitors \$44.3m was down 6.9% compared to the previous year.
- Spend from Northland (\$20.1m, down 1.5%), the Bay of Plenty (\$15.3m, down 0.1%), Wellington (\$12.4m, down 16.9%) and Canterbury (\$12.3m, down 15.6%) was down in June 2024, compared to June 2023.

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
Jun-24	44.3	-6.9%	20.1	-1.5%	15.3	-0.1%	12.4	-16.9%	12.3	-15.6%



May

USA visitors spent \$301m in the year to June 2024, up 57.5% on the previous year

- In the year to June 2024, Australian tourism spend was \$209m, down 16.2% on the previous year.
- Tourism spend from the US was \$301m, up 57.5%.
 - The 2023/4 summer season has seen the largest ever air capacity out of the USA flying to NZ.

12 month spend (\$m)

- Spend from the UK was \$123m, also up 8.4% for the year to June 2024.
- Chinese visitors spent \$133m in the year to June 2024, up 34.8% on the previous year.
- Spend from Japan (up 56.2% to \$18.7m), Korea (up 53.5% to \$18.1m), Canada (up 8.4% to \$22.4m), and Germany (up 5.0% to \$18.8m) was also up on the previous year.

\$350 \$300 \$250 USA Australia \$200 ---- China -UK \$150 - Canada Germany \$100 Japan Korea \$50 -----Other \$0 Jan 2023 Jun 2023 Jul 2023 Aug 2022 Sep 2022 Oct 2022 Nov 2022 Dec 2022 Feb 2023 Apr 2023 May 2023 Aug 2023 Sep 2023 Oct 2023 Nov 2023 Dec 2023 Jan 2024 Jul 2022 Feb 2024 Mar 2024 Apr 2024 Jun 2022 Mar 2023 2024 Jun 202

	Australia (\$m)	vs. previous year / YE	China (\$m)	vs. previous year / YE	UK (\$m)	vs. previous year / YE	US (\$m)	vs. previous year / YE	Germany (\$m)	vs. previous year / YE
YE June 2023	209	-16.2%	133	34.8%	123	8.4%	301	57.5%	19	5.0%

Year-end tourism expenditure in Auckland, by market



Visitors from the US spent \$18.1m in June 2024, up 53.4% on the previous year

- For the month of June 2024, tourism spend from the US (\$18.1m) was up 53.4% compared to last June.
 - The 2023/4 summer season has seen the largest ever air capacity out of the USA flying to NZ.
- Visitors from Australia spent \$12.0m in June, down 12.8% on the previous year.
- Visitors from China spent \$8.7m in June, down 3.6% compared to last year.
- There was an increase in tourism spend from the UK (up 29.9% to \$6.6m) while a decrease in German tourism spend (down 24.7% to \$0.4m) for the month of June 2024.

\$40 \$35 \$30 Monthly spend (\$m) \$25 -USA \$20 -Australia \$15 -China \$10 UK Germany \$5 \$0 Feb 2024 Mar 2024 14/12/023 1412023 0ec 2023 APT 2024 VIAY 2023 1an202A Nay 2024 < eb 2023 1un 2024 Viar 2023 APT 2023 13 2023 2023 042 2023 2023

	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
Jun-24	12.0	-12.8%	8.7	-3.6%	6.6	29.9%	18.1	53.4%	0.4	-24.7%

Monthly tourism expenditure in Auckland, by market

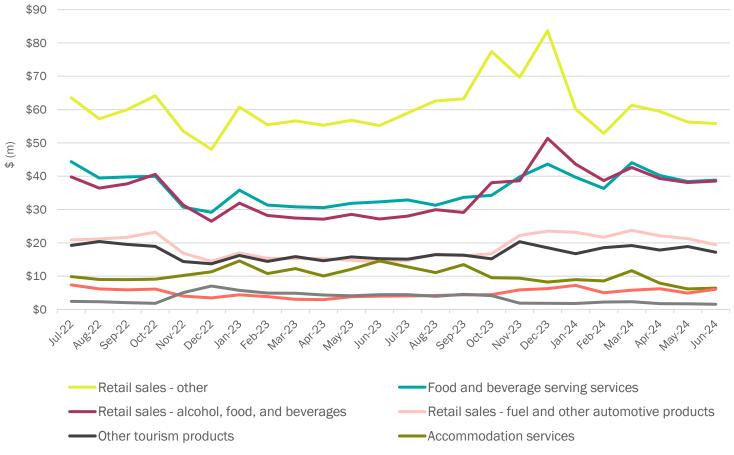


\$55.8m spent in Retail sales (other) by domestic visitors in June 2024

	Spend (\$m)	% change
Accommodation services	6.4	-55.8%
Cultural, recreation, and gambling services	6.1	52.0%
Food and beverage serving services	38.8	20.2%
Other passenger transport	1.6	-64.3%
Other tourism products	17.2	12.4%
Retail sales - alcohol, food, and beverages	38.6	41.8%
Retail sales - fuel and other automotive products	19.4	35.6%
Retail sales - other	55.8	1.1%
Grand Total	183.9	-6.2%

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Domestic monthly tourism transactions in Auckland, by product



- -----Cultural, recreation, and gambling services
- ----Other passenger transport

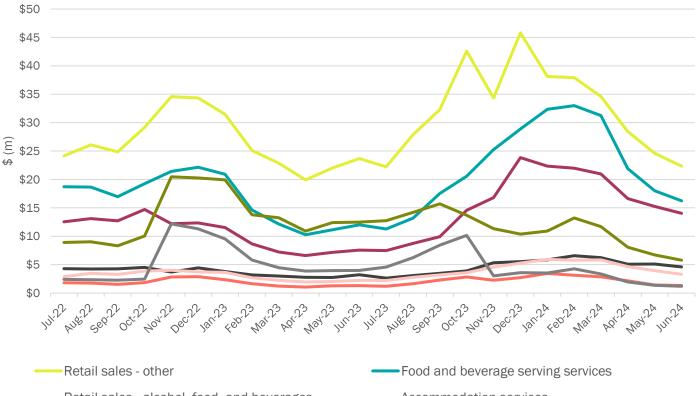


\$22.3m spent in Retail sales (other) by International visitors in June 2024

	Spend (\$m)	% change
Accommodation services	5.8	-53.7%
Cultural, recreation, and gambling services	1.3	2.3%
Food and beverage serving services	16.2	34.9%
Other passenger transport	1.2	-69.8%
Other tourism products	4.6	42.4%
Retail sales - alcohol, food, and beverages	14.0	85.6%
Retail sales - fuel and other automotive products	3.3	46.9%
Retail sales - other	22.3	-5.6%
Grand Total	68.8	3.5%

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International monthly tourism transactions in Auckland, by product



- Retail sales alcohol, food, and beverages
- Other tourism products
- -----Cultural, recreation, and gambling services
- Accommodation services
- ----- Retail sales fuel and other automotive products
- -----Other passenger transport





Major Events Quarterly Overview 01 April – 30 June







2024 Rainbow Games 06 April – 09 April



2024 International Comedy Festival 03 May – 26 May



2024 Aotearoa Art Fair 18 April – 21 April



2024 Writers Festival 14 May – 19 May



Major Events Quarterly Overview 01 April – 30 June





Quarterly attendance



Quarterly visitor nights

7.4^k

Quarterly outside of region attendees







Quarterly regional change in GDP

0,

Total quarterly event expenditure



Auckland – Business Events Data



Business Events Insights Q2 2024



434

Business events in Auckland



Delegates hosted in Auckland



Delegate days hosted in Auckland





Auckland's market share of business events







Auckland's market share of delegates





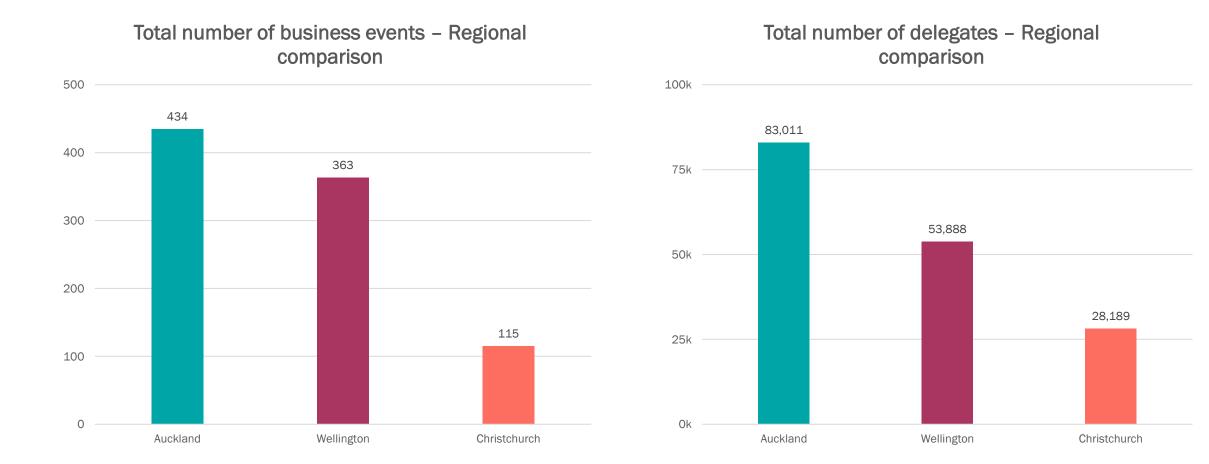


Auckland's market share of delegate days





Auckland attracted the highest number of business delegates (83.0k) in New Zealand in Q2 2024



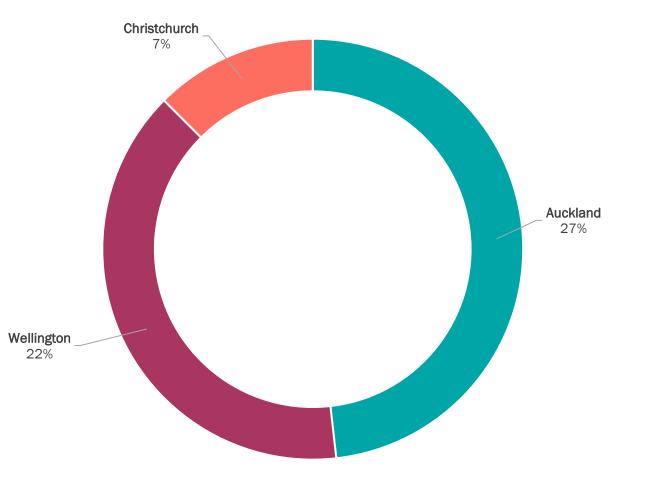
Source: Business Events Data Programme. Fresh Info. *Quarterly data.



Auckland had the largest market share of business events in NZ in Q2 2024



Business Event Market Share - Regional Comparison





Auckland hosted the most conferences, other business events and expos in NZ Q2 2024

- Looking at business event type, Auckland hosted the most conferences (160), other business events like social functions and Gala dinners (106) out of the three featured regions in 02 2024.
- However, Wellington held the highest number of meetings (170), followed by Auckland (151) and then Christchurch (48).
- The majority of business events in Auckland were for Corporate customers (171), Associations (42) and Education customers (31).
- Among the three regions, Wellington recorded the most Government-related business events (63). This can be attributed to the fact that Wellington is home to New Zealand's Parliament.

200 170 160 151 160 146 106 120 80 48 36 34 28 40 13 0 Meetings Conferences Expos Other Auckland Wellington Christchurch



Business Events By Customer Type

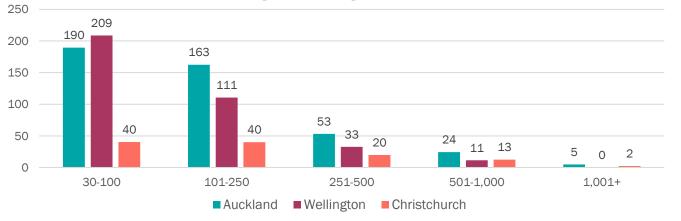
Business Events By Event Type



36% of all business events in Auckland were multi-day events in Q2 2024

- In Q2 2024, 44% of all business events held in Auckland were smaller events hosting between 30-100 delegates (190 events). In comparison to other regions, Wellington hosted most small business events (209 events).
- 37% of business events in Auckland were medium-sized events with 163 events that hosted between 101-250 delegates.
- 12% of business events (53) in Auckland hosted between 251-500 delegates.
- Auckland had 5 large-scale events that hosted over 1,000 delegates in Q2 2024.
- In Q2 2024, nearly two-thirds of all business events (64%) in Auckland were one day events (278), while 36% were multi-day events. 17% were held for a duration of two days (76), and 7% ran over the course of three days (28).

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No. of delegates - Regional comparison



Duration of event - Regional comparison

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Auckland Visitor Survey

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

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Promoters Net Promoter Score YE June 2022 -3





Total Net Promoter Score YE June 2022 -6



7.3/10 **Total Satisfaction Overall experience in** Auckland

YE June 2022

-0.1



Tātaki Auckland Suckland

Detractors Net Promoter Score YE June 2022 -3

29%



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. This programme is currently on hold

Tataki

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).

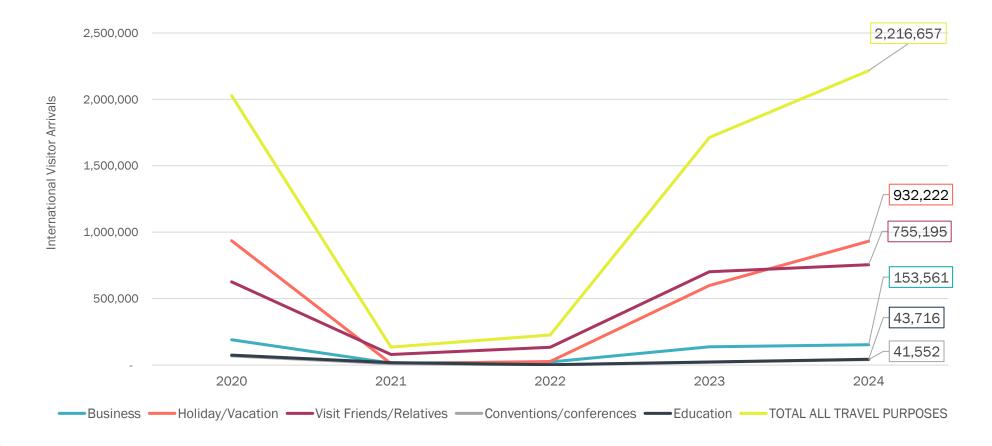


Note: YE June 2022 findings are based on domestic visitors only and are compared to YE June 2021 domestic visitor results. No data collection occurred in Q2 2020. This programme is currently on hold.



Five-year trends in key markets

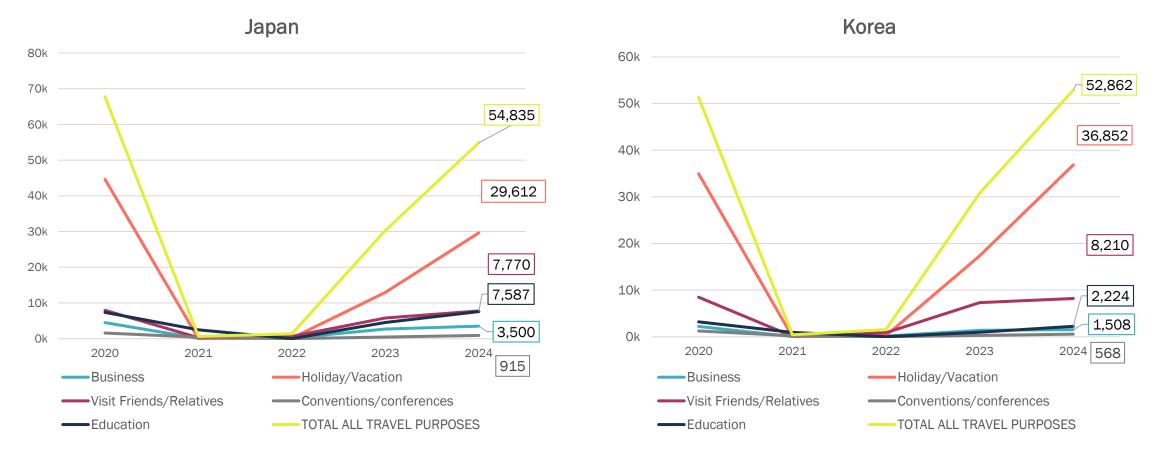




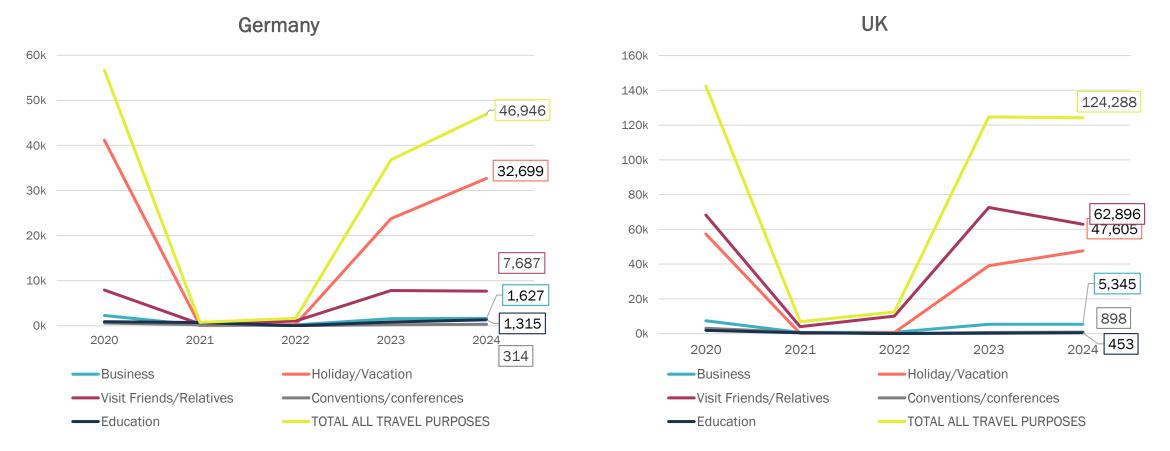




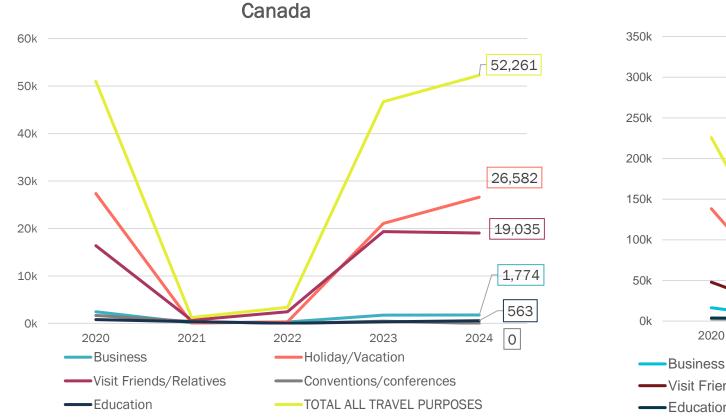


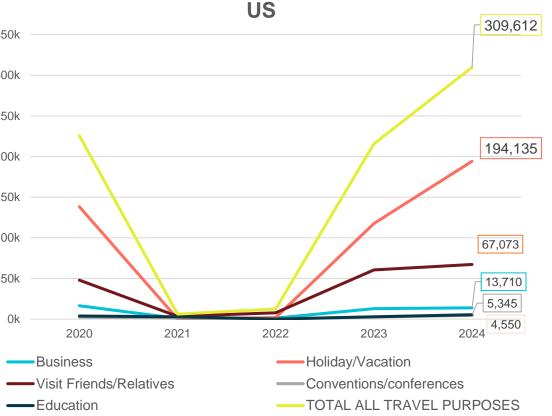












Ngā mihi Thank you

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