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Key Visitor Data





INTERNATIONAL

- Monthly international visitors (237.0k) were up 25.3% on March 2023 (186.3k).
- The year to March 2024 saw 2.20m international visitor arrivals, an increase of 48.7% on 2023. However, international visitation was down 13.6% compared to 2020 levels (2.55m in YE March 2020).
- There was an increase in Australian visitors in the month of March 2024, with 72.6k visitors, up 18.2% compared to last March. The year to March 2024 saw 706.4k Australian visitor arrivals, up 12.3%.
- Holiday visitors (915.3k) contributed the most to annual visitor numbers and increased 87.6% in the year to March 2024. Monthly numbers (106.9k) were up 49.2% compared with March 2023.
- VFR visitors (764.4k) were up 18.9% for the year, with monthly numbers (78.2k) up 15.5%.
- 321.6k international guest nights in commercial accommodation for March, up 34.1% on last year.

DOMESTIC

- The domestic visitor numbers are no longer available as the Ministry of Business, Innovation, and Employment (MBIE) has cancelled the Monthly Unique Regional Population Estimates (MURPEs) data until further notice.
- There were **411.8k domestic guest nights in commercial** accommodation for the month of March, down 9.3%.
- At present, we cannot display current spend data from the Monthly Regional Tourism Estimates (MRTEs) as this dataset has been paused by MBIE (due to the disestablishment of Data Ventures - a branch of Stats NZ which occurred in December 2023).
- Regional spend data for domestic and international visitors to Auckland will be reported again once the issue has been remedied.

OVERALL

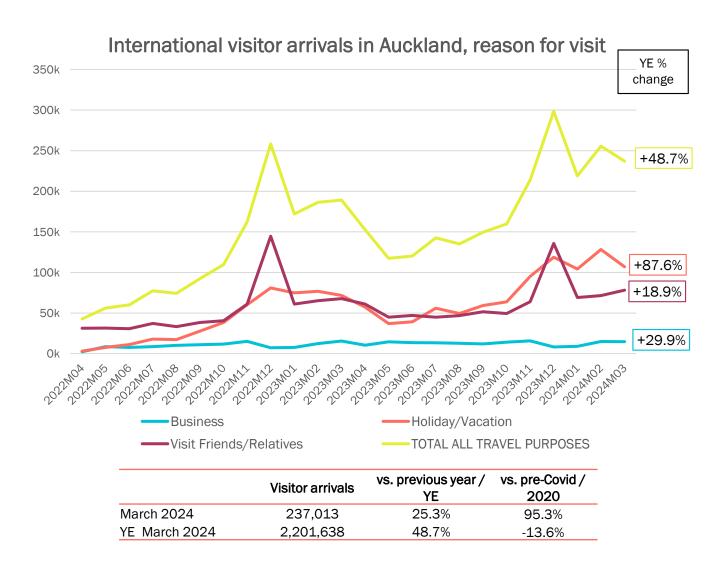
- For the month of March 2024, there were 733.4k total guest nights in commercial accommodation in Auckland, up 5.7% on last year.
- On average, visitors stayed in Auckland for 2.0 nights in March 2024 (down 4.8% on the previous year).
- Average hotel Occupancy for the month was 75.2%, 6.3% lower compared to March 2023.
- The Average Daily Rate for March was \$251 (down 5.0%) and the RevPAR was \$192 (down 10.0% compared to the previous year).
- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Friday 8th March 2024 at \$380 (up 41.2% on the previous year). This coincides with the P!NK concert at Eden Park.
- Looking forward (over the next three months), overall occupancy on the books is generally similar for the period from May to August 2024 in comparison to last year.
- Occupancy on the books peaked at 70% on Tuesday 7th May 2024.





2.20m International visitor arrivals in the year to March 2024, up 48.7%

- The month of March saw 237.0k international visitors, up 25.3% on March 2023 (189.2k).
- The year to March 2024 saw 2.20m international visitor arrivals, an increase of 48.7% on the previous year. However, international visitation was down 13.6% compared to 2020 levels (2.55m in YE March 2020).
- Holiday visitors (915.3k) contributed the most to annual visitor numbers and increased 87.6% on the year to March 2024. Monthly holiday numbers (106.9k) were also up 49.2% compared with the month of March 2023.
- VFR visitors (764.4k) were up 18.9% for the year, with monthly numbers (78.2k) up 15.5%.
- There were 153.2k business visitors (up 29.9%) in the year to March 2024, and 14.8k for the month (down 4.7%).

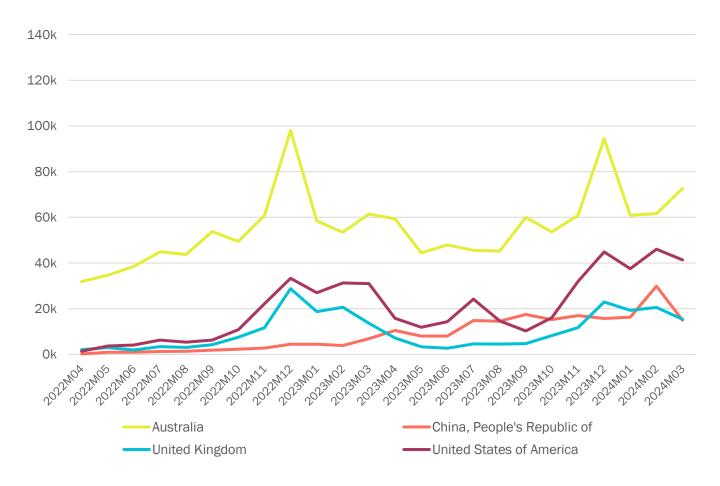




706.4k visitors from Australia for YE March 2024, up 12.3%

- There was an increase in Australian visitors in the month of March 2024, with 72.6k visitors, up 18.2% compared to last March. The year to March 2024 saw 706.4k Australian visitor arrivals, up 12.3%.
- The year to March 2024 saw 308.9k visitors from the US (up 69.1%), with 41.3k visitors for the month (up 33.2%).
- Visitors from China (182.5k) were also up for the year (485.5%), and up (117.9%) for the month of March (to 15.0k).
- For the year to March 2024, there were 125.2k visitor arrivals from the UK (up 5.7%) and 15.4k visitors for the month (up 13.2%).

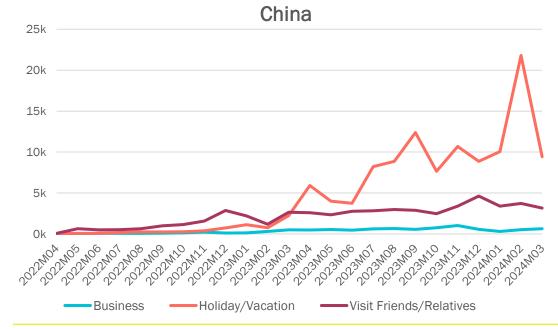
Visitor arrivals in Auckland by key international markets





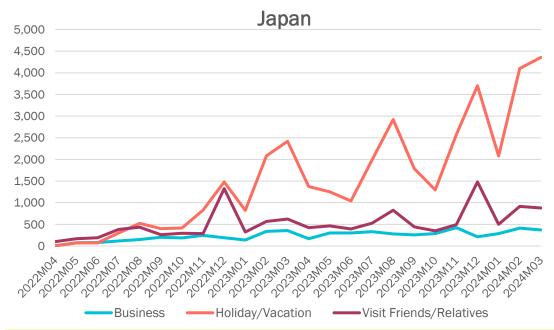


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	8,360	-5.3%	21,073	29.3%	34,603	24.4%	72,636	18.2%
YE March 2024	87,990	16.0%	190,051	22.8%	342,436	4.6%	706,372	12.3%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	629	25%	9,425	322.6%	3,157	19.7%	14,970	117.9%
YE March 2024	7,084	307.6%	111,583	1679.3%	37,091	148.2%	182,462	485.5%



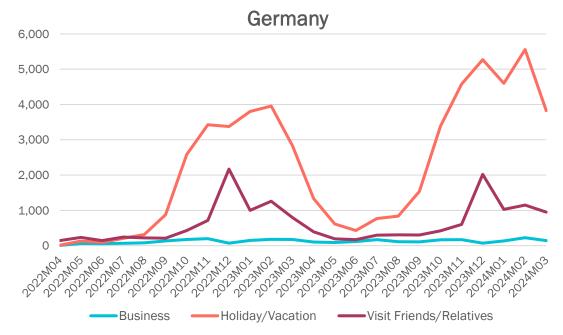


	Business	vs. previous year	Holiday \	/s. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	371	3.6%	4,355	80.0%	876	40.4%	7,101	37.3%
YE March 2024	3,630	74.3%	28,456	202.1%	7,687	55.3%	53,354	120.2%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	135	7.1%	4,383	93.1%	841	40.9%	5,953	68.5%
YE March 2024	1,663	57.2%	37,234	200.8%	8,572	28.8%	54,336	130.0%



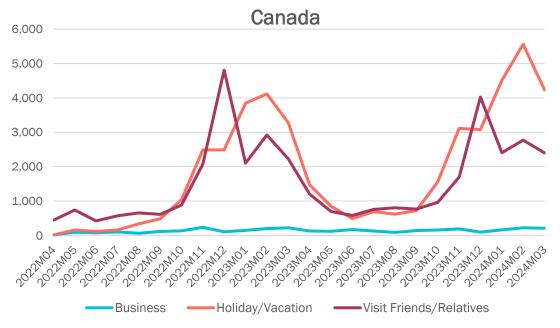


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	147	-16.9%	3,824	35.0%	953	19.3%	5,253	24.9%
YE March 2024	1,627	18.5%	32,734	51.4%	7,849	3.5%	47,033	38.7%

25k	UK
20k	
15k	
10k	
5k	
Ok	
2022/202	
	Business

	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	559	-3.6%	5,887	29.6%	8,084	9.3%	15,384	13.2%
YE March 2024	5,459	16.3%	47,757	34.5%	63,886	-10.3%	125,237	5.7%





	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	206	-7.6%	4,229	29.0%	2,399	7.6%	7,418	16.7%
YE March 2024	1,807	19.7%	26,892	45.2%	19,075	3.4%	52,546	23.5%



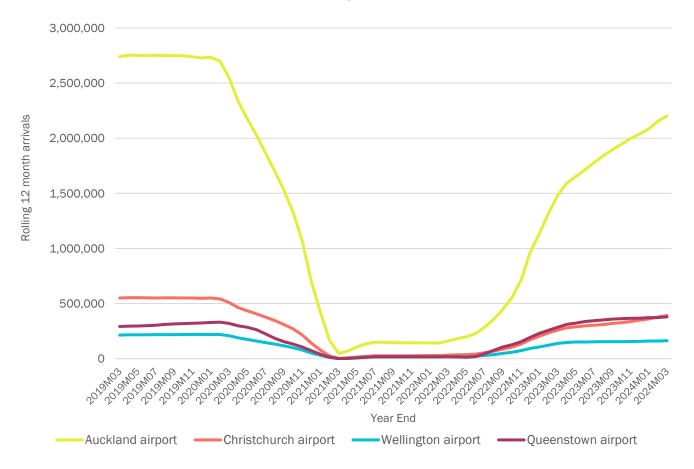
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
March 2024	1,546	-6.0%	27,905	44.8%	8,035	17.4%	41,331	33.2%
YE March 2024	13,803	31.0%	192,932	96.6%	68,070	26.6%	308,869	69.1%



Auckland has seen a 48.7% 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 48.7% increase in international visitor arrivals over the last year.
- For the year ending March 2024, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 33.3%, Christchurch was up 50.4% and Wellington was up 17.6% compared to last year.

12 month rolling visitor arrivals







733.4k total guest nights in commercial accommodation in March 2024, up 5.7%

- For the month of March 2024, there were 733.4k total guest nights in commercial accommodation in Auckland, up 5.7% on the same month last year.
- There were 411.8k domestic guest nights in commercial accommodation (down 9.3%), and 321.6k international guest nights (up 34.1%) in commercial accommodation in March 2024.
- For New Zealand overall, there were 4.16m guest nights in commercial accommodation in March 2024, up 10.3% compared to March 2023.

Guest nights in commercial accommodation - Auckland



■ Domestic guest nights ■ Inte

International guest nights

March 2024	Auckland	% change	New Zealand	% change
Total guest nights	733,400	5.7%	4,155,100	10.3%
Domestic guest nights	411,800	-9.3%	2,579,600	4.7%
International guest nights	321,600	34.1%	1,575,500	21.0%

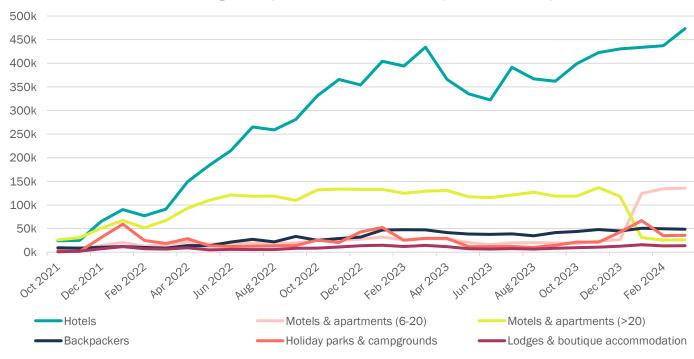


473.2k guest nights in hotels in March 2024, up 9.0%

- For the month of March 2024, there were 473.2k guest nights in hotels in Auckland, up 9.0% compared to March last year.
- There were 135.7k guest nights in motels and apartments (6-20), up 355.4% on the previous year.
- However, guest nights in motels and apartments (>20) (26.3k) were down (79.6%).
- Guest nights in holiday parks and campgrounds (35.9k) were up (21.7%) for the month of March.
- Guest nights in backpacker accommodation increased (up 3.2% to 48.7k) in March 2024.
- Guest nights in lodges and boutique accommodation were down (6.8% to 13.6k) for the month.

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Guest nights by accommodation type (monthly)



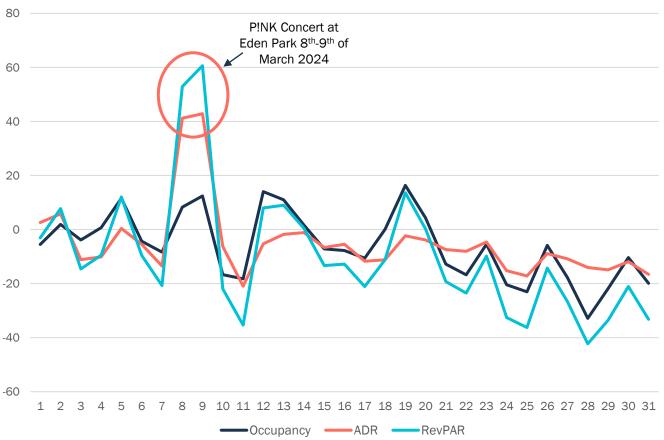
March 2024	Guest nights	% change
Hotels	473,200	9.0%
Motels & apartments (6-20)	135,700	355.4%
Motels & apartments (>20)	26,300	-79.6%
Backpackers	48,700	3.2%
Holiday parks & campgrounds	35,900	21.7%
Lodges & boutique accommodation	13,600	-6.8%



Average Occupancy for March 2024 was 75.2%, down 6.3% on 2023

- For the month of March 2024, the average Occupancy was 75.2%, 6.3% lower compared to March 2023.
- The Average Daily Rate (ADR) for the month was \$251, down 5.0% on last year.
- Monthly Revenue per available room (RevPAR) for March was **\$192, 10.0% lower** compared to last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in March 2024. Occupancy, ADR, and RevPAR all peaked on Friday 8th March, coinciding with the P!NK concert at Eden Park.

Percent Changes for the Month of March





Average daily rate was \$380 on 8th March 2024 (coinciding with the P!NK concert at Eden Park), up 41.2% on 2023

- The average daily rate (ADR) for hotels in Auckland was the highest for the month on Friday 8th March 2024 at \$380 (up 41.2% on the previous year). This coincides with the P!NK concert at Eden Park.
- Hotel occupancy reached 91.7% on Friday 8th March 2024 (up 41.2% on the previous year).
- Revenue per available room (RevPAR) peaked to \$348 also on Friday 8th March 2024. This was up 52.9% in comparison to last year.

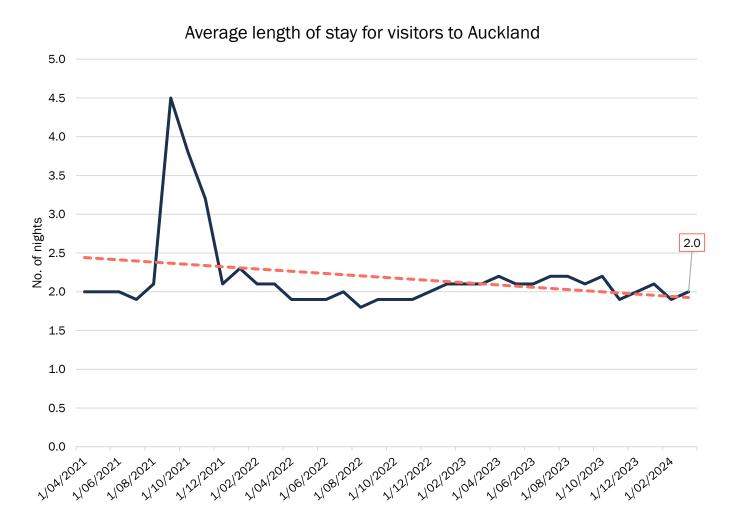
Daily hotel rates for the Month of March





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

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

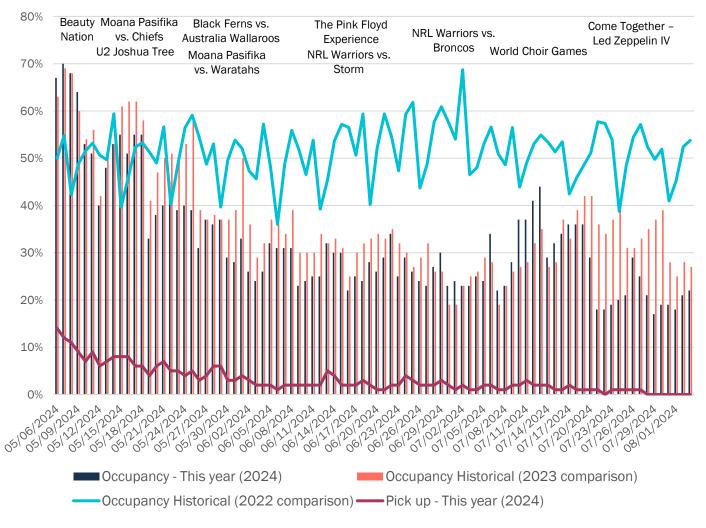




90 Day Forward Booking Occupancy Data

- Looking forward (over the next three months), overall occupancy on the books is generally similar for the period from May to August 2024 in comparison to last year.
- There is considerable variance in hotel occupancy when comparing the next three months of 2024 to last year.
- Occupancy on the books peaked at 70% on Tuesday 7th May 2024.
- Occupancy also reached 68% on Wednesday 8th May 2024.

Occupancy - 90 Day Forward Outlook



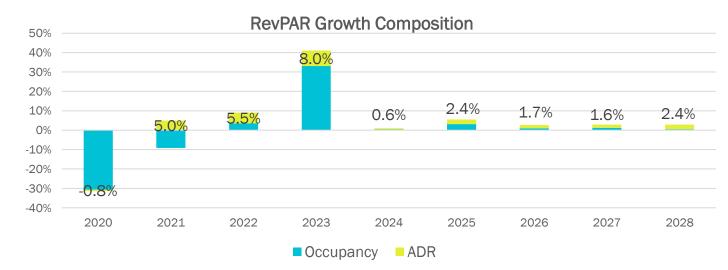


Longer term projections

- In addition to the STR Global 90 Day Forward Booking data we receive, we also receive a longer-term outlook, with forecast data for the next four years until 2027. This data is provided by STR Global in collaboration with Oxford Tourism Economics.
- In 2023 Q4 supply expanded 2.3%. Demand expanded 13.6%, resulting in an occupancy gain of 11.1%. Occupancy is expected to decline by -0.5% in 2024 Q1, with supply expanding 8.0% and demand expanding 7.5%.
- After expanding 33.1% in 2023, occupancy is expected to expand 0.4% in 2024. ADR is expected to increase 0.6%, resulting in RevPAR growth of 1.0% in 2024. RevPAR is expected to grow by 5.6% in 2025.
- Over the next three years, occupancy is expected to expand at an average annual rate of 1.5%, while ADR is expected to expand at an average annual rate of 1.6%.

Supply and Demand Growth







15.8k average daily rooms available in 2023, with 17.1k rooms forecast for 2024

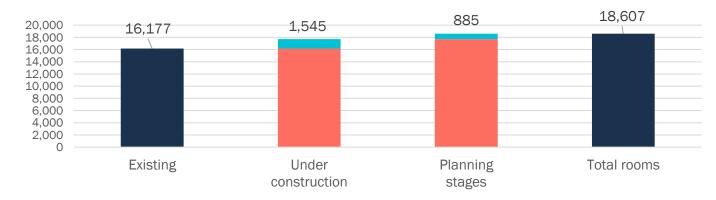
- In 2023, on average there were 15.8k daily rooms available in Auckland. The number of average daily rooms available is set to increase by 8.5%, which will supply an additional 1,336 rooms (compared to 2022).
- Looking to 2024, average room supply is expected to expand 8.5%, supplying 1.3k new rooms and bringing the total number of rooms to 17.1k.
- Observing rooms by phase data, there was a total of 18.6k rooms (from 226 properties) in the pipeline.
- This comprised of 16.2k existing rooms (from 211 properties, 1.5k rooms under construction (from 10 properties), and 885 rooms in the planning stages (from 5 properties).

Average Supply

(Avg. daily rooms during year)

	Year	Rooms	% Chg.	Chg.
	2020	14,162	2.7%	375
Actual	2021	14,919	5.4%	758
	2022	15,328	2.7%	409
	2023	15,770	2.9%	442
Forecast	2024	17,106	8.5%	1,336
	2025	17,311	1.2%	205
	2026	17,440	0.7%	129
	2027	17,792	2.0%	352
	2028	17,878	0.5%	86

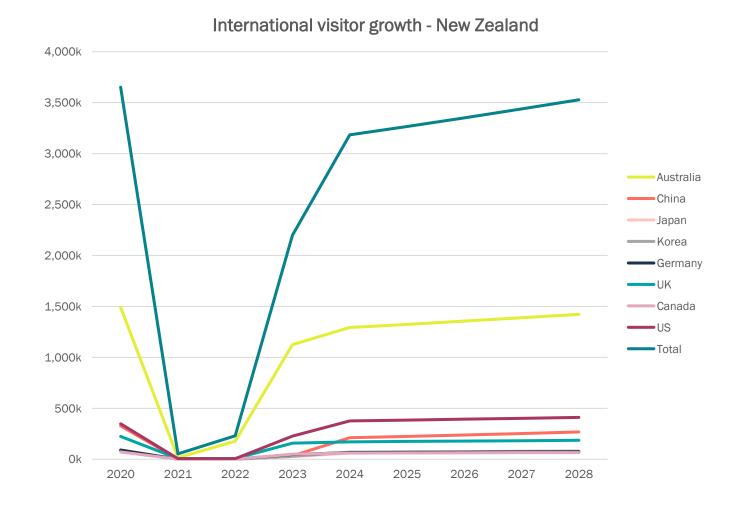
Rooms by phase





In total, 3.53m visitors are projected to visit **New Zealand in YE March 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 13.0% from 2023 to 2028 (for Q3 2023), resulting in a possible 3.53m international visitors by YE March 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 2.4%. 1.42m Australian visitors are expected to visit New Zealand in the year to March 2028 (bringing visitation close to pre-Covid levels of 1.49m in 2020).



^{*} International visitation by city is based on the Global City Travel (GCT) database maintained by Tourism Economics. GCT tracks overnight visits by international visitors to 300 global cities. The data is tracked by country of origin on an annual basis, including historical and forecast years. The data shown here for the country is taken from the Global Travel Service (GTS) database, also maintained by Tourism Economics. This reflects international visitation by origin market, including historical and forecast years.

Spend Data

- At present, we cannot display current spend data from the Monthly Regional Tourism Estimates (MRTEs) as this dataset has been paused (due to the disestablishment of Data Ventures – a branch of Stats NZ which occurred in December 2023).
- Historical MRTE spend data (until October 2023) is still available and can be found here.
- The Ministry of Business, Innovation, and Employment (MBIE) and Stats NZ are working together to explore alternative options to restore the MRTE.
- Regional spend data for domestic and international visitors to Auckland will be reported again once the issue has been remedied.







Major Events Insights -**March 2024**



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Event	Date	Venue	Interesting Findings
Moana Auckland Festival	24 February – 24 March 2024	Te Wero Island in the Viaduct	
Maritime (Wooden Boat) Festival	1 March 2024	Jellicoe Harbour, Wynyard Quarter	■ The month of March saw 237.0k international visitors, up 25.3% on March 2023.
Harbour Classic	8 March 2024	North Wharf, Wynyard Quarter	■ For the month of March 2024, there were 733.4k total guest nights in commercial accommodation in Auckland, up 5.7% on the same month last
Pink	8 March 2024	Eden Park	year.
Pasifika Festival	9 March 2024	Western Springs Stadium and Park	For the month of March 2024, the average Occupancy was 75.2%, 6.3% lower compared to March 2023.
Auckland Boat Show	15 March 2024	Jellicoe Harbour	



Moana **Auckland Key** Insight

94.6^k

Attendance

\$5.3^m

Visitor Spend

\$4.2^m

GDP









21.0%

Attendees from outside of Auckland



Event operations expenditure in the region



Visitor nights







Moana Auckland

Moana Auckland, New Zealand's Ocean Festival, was a first of its kind in Tāmaki Makaurau Auckland. The festival celebrates the region's love affair of the ocean - from waka to super yachts - through events and activities both on and off the water.

Key Insight

- 94.6k attendees (79% were Aucklanders)
- 21% attendees from outside of Auckland
- \$4.2m GDP
- \$5.3m spend by visitors
- 15.5k visitor nights
- \$5.3m event operations expenditure in the region





Pasifika Festival Key Insight





Attendees



Visitor Spend



GDP



Overall event **Attendee Satisfaction**



7.8%

Attendees from outside of Auckland



Visitor nights







Pasifika Festival

A celebration of all things Pacific, Pasifika Festival returned to Western Springs in 2024. The iconic festival's eight villages showcase the best of the 11 Pacific Island nations with worldclass traditional and contemporary performances, soul food and much more. The festival included over 100 delicious local food and independent craft stalls as well as show-stopping performances across eight stages.

Key Insight

- 31.1k attendees (92% were Aucklanders)
- \$254k total spend by visitors
- \$226k GDP
- 1.4k visitor nights
- 87% Satisfaction with overall event





Highlight of the month: Pasifika Festival

- The Pasifika Festival's return to Western Springs on March 9-10 garnered significant media attention.
- Earned media coverage spanned 126 mentions across diverse platforms, reaching a potential audience of 4,769,303 and generating an Equivalent Advertising Value (EAV) of NZD 1,749,815.
- Coverage included TVNZ Breakfast, Newshub, RNZ, Stuff, NZ Herald, Tagata Pasifika, Coconet, and more, both leading up to and during the festival weekend.





This is his mum just looking at him and, you know, smiling from there like makes me proud. So yeah, he's doing very well. And what did you promise them if they smile. Oh I promise the girls um all of them. If they smile, they will get pizza on Wednesday from Tuvalu To Samoa. Every stage. A celebration of the Pacific. People who call Aotearoa home.

Auckland Pasifika Festival comes alive this weekend



Tāmaki Makaurau is set to come alive this week to celebrate the magic of Pacific culture, language, identity, and community with the return of The Auckland Pasifika Festival.

Pasifika Festival 2024: What to eat this weekend at Auckland's Pasifika







Pasifika Festival is taking place this weekend at Western Springs Park, Photo / Dean Purcell



Looking ahead: April 2024

- The inaugural Rainbow Games take place from 4 8 April.
- The Aotearoa Arts Fair takes place at the Viaduct Events Centre from 18
 21 April.
- Providing continued communications planning support for the 13th World Choir Games.
- Supporting US Roadshow media event, including media release
- Supporting renewal of DPP with revisions and media release in mid-April.
- Supporting NZK production filming in Auckland.
- School holidays media release to be distributed on 11 April.





Business Events Insights Q1 2024



277

Business events in Auckland



23%

Auckland's market share of business events



59.9^k

Delegates hosted in Auckland



33%

Auckland's market share of delegates



90.8^k

Delegate days hosted in Auckland



30%

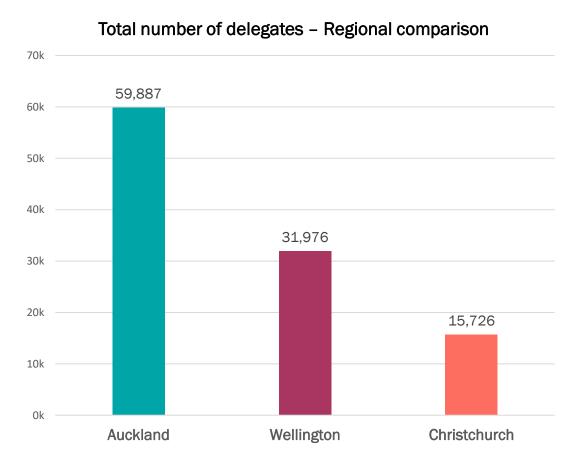
Auckland's market share of delegate days





Auckland attracted the highest number of business delegates (59.9k) in New Zealand in Q1 March 2024



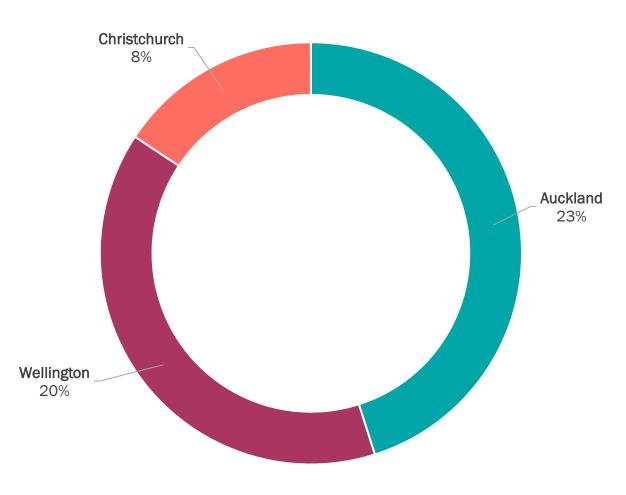




Auckland had the largest market share of business events in NZ in **Q1 March 2024**



Business Event Market Share - Regional Comparison

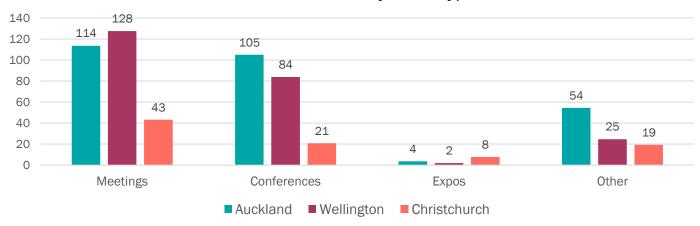




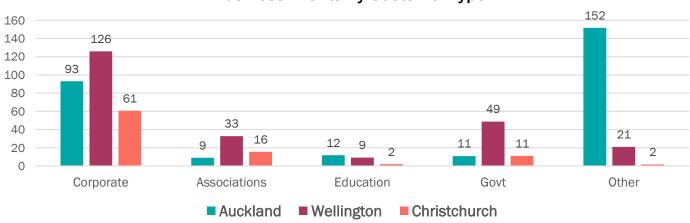
Auckland hosted the most conferences, other business events and expos in NZ Q1 March 2024

- Looking at business event type, Auckland hosted the most conferences (105), other business events like social functions and Gala dinners (54) out of the three featured regions in Q1 March 2024.
- However, Wellington held the highest number of meetings (128), followed by Auckland (114) and then Christchurch (43).
- The majority of business events in Auckland were for Corporate customers (93), Associations (9) and Education customers (12).
- Among the three regions, Wellington recorded the most Government-related business events (49). This can be attributed to the fact that Wellington is home to New Zealand's Parliament.

Business Events By Event Type



Business Events By Customer Type





24% of all business events in Auckland were multi-day events in Q1 March 2024

- In Q1 2024, a third of all business events held in Auckland were smaller events hosting between 30-100 delegates (94 events). In comparison to other regions, Wellington hosted most small business events (148 events).
- 40% of business events in Auckland were medium-sized events with 110 events that hosed between 101-250 delegates.
- 20% of business events (56) in Auckland hosted between 251-500 delegates.
- Auckland had 4 large-scale events that hosted over 1,000 delegates in Q1 2024.
- In Q1 2024, three quarters of all business events (76%) in Auckland were one day events (211), while 24% were multiday events. 13% were held for a duration of two days (35), and 6% ran over the course of three days (16).

No. of delegates - Regional comparison



Duration of event - Regional comparison







Visitor Experience



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30%

Promoters Net Promoter Score YE June 2022 -3



NPS

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



Detractors Net Promoter Score YE June 2022 -3



Total Satisfaction Overall experience in Auckland YE June 2022 -0.1



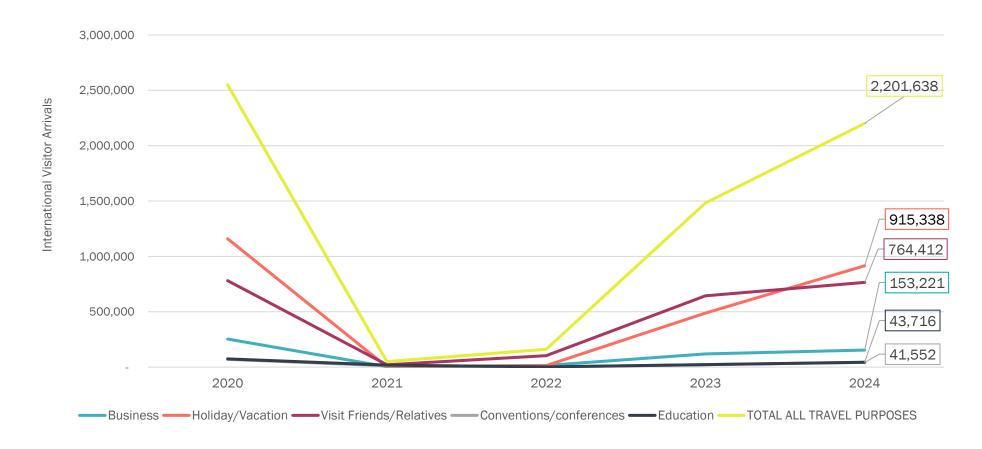
Net Promoter Score

- The Net Promoter Score (NPS) is an index ranging from -100 to +100 that measures customer engagement and loyalty, based on the likelihood of customers to recommend a product or service.
- For domestic visitors in YE Jun 2022, NPS was +1. (down 6 points from YE June 2021).
- Domestic visitors most likely to recommend Auckland as a visitor destination include those aged 30-44 (NPS +6), Otago residents (NPS +16), those whose main reason to visit is a conference, convention or other business event (NPS +23), those travelling with a friend/s (NPS +6) and those who also include Northland in their itinerary (NPS +13).
- Inversely, those least likely to recommend Auckland as a visitor destination are those aged 18-29 years (NPS -8), those who used to live in the Auckland region (NPS -4), and those travelling with children (NPS -3) or with other members of their family (NPS -12).

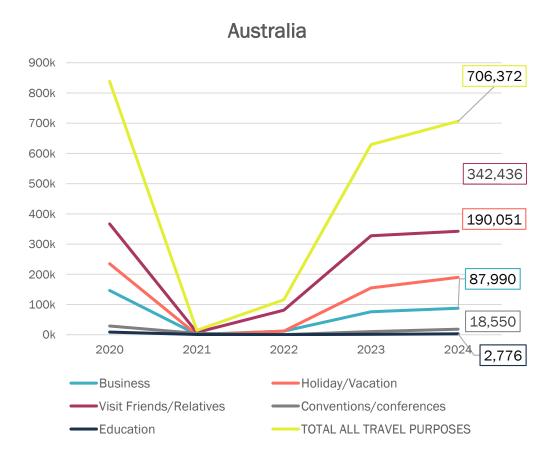


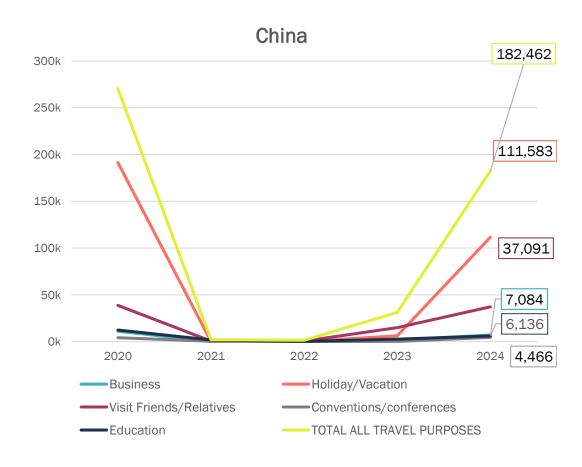




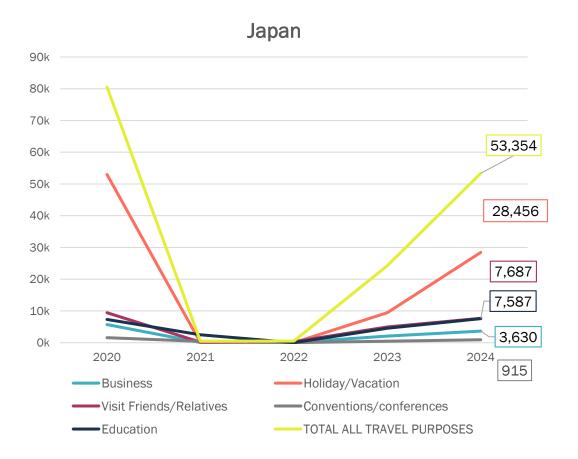


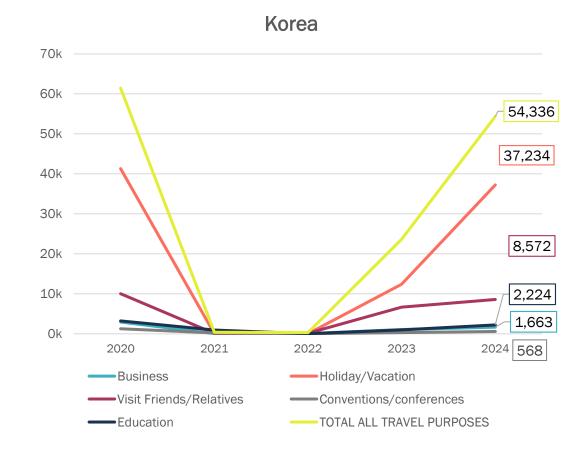




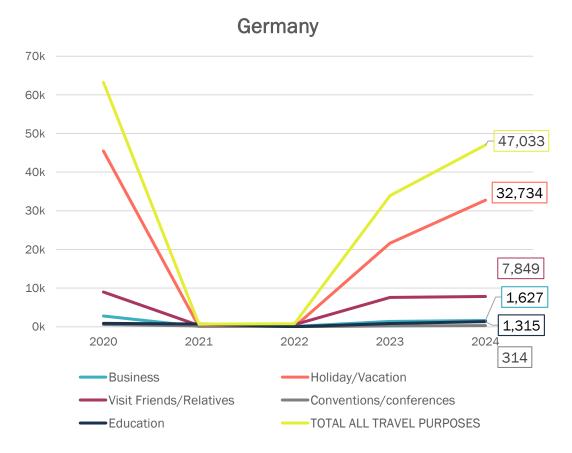


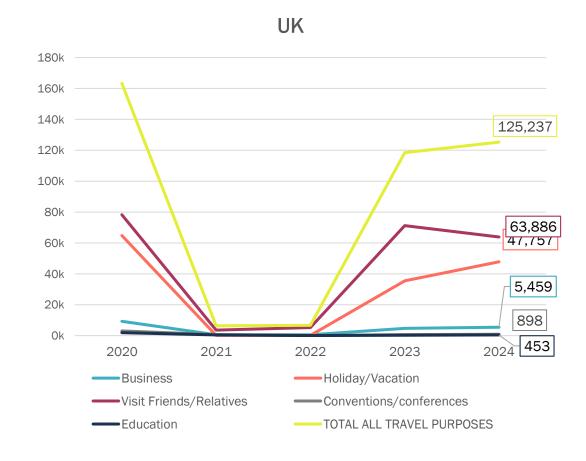




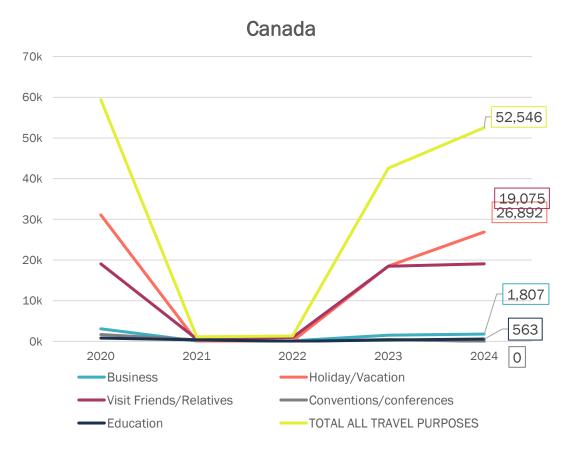


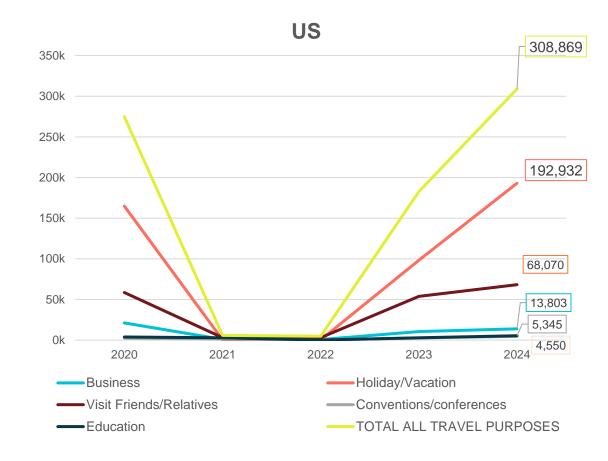












Ngā mihi Thank you

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