



# Auckland Destination Overview

February 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 April 2022  
By Jaimee Raymond, Research & Insights

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# Contents

<b>KEY FINDINGS</b>	<b>3 – 4</b>
<b>VISITOR ARRIVALS DATA</b>	
DOMESTIC VISITOR DATA UPDATE	6 – 7
INTERNATIONAL VISITORS	
REASON FOR VISIT   MARKET   SEASON	8 – 10
AUCKLAND VS. OTHER PORTS	11
<b>ACCOMMODATION DATA</b>	
AVERAGE LENGTH OF STAY – DOMESTIC	13
COMMERCIAL GUEST NIGHTS	14
ADR, HOTEL OCCUPANCY AND REVPAR	15 – 16
FORWARD BOOKING DATA	17
SHORT-TERM RENTAL LISTINGS (E.G. AIRBNB)	18 – 20
AVERAGE LENGTH OF STAY – INTERNATIONAL	21
<b>SPEND DATA</b>	
DOMESTIC   OTHER	
YEAR-END & MONTH	23 – 24
PRODUCT   CATEGORY	25 – 26
<b>MAJOR &amp; BUSINESS EVENTS DATA</b>	
MAJOR EVENTS INSIGHTS	28
BUSINESS EVENTS INSIGHTS	29
<b>TOURISM SENTIMENT INDEX</b>	
TSI KPIS, CATEGORIES AND TRENDS	31 – 34
<b>AUCKLAND VISITOR SURVEY</b>	
VISITOR EXPERIENCE & NET PROMOTER SCORE	36 – 37
<b>FIVE YEAR TRENDS IN KEY MARKETS</b>	
REASON FOR VISIT BY MARKET	39 – 43



## Key Visitor Data



**417.5<sup>k</sup>**

**Domestic Visitors**  
February 2022 (Month)  
-12.2% (to Feb 2021)



**4.70<sup>k</sup>**

**International Visitors**  
February 2022 (Month)  
-6.2% (to Feb 2021)



**29.7%**

**Hotel Occupancy Rate**  
February 2022 (Month)  
-12.9pts (to Feb 2021)



**\$142<sup>m</sup>**

**Domestic Tourism Transactions**  
February 2022 (Month)  
-3.9% (to Feb 2021)



**\$36<sup>m</sup>**

**Other Tourism Transactions**  
February 2022 (Month)  
+46.3% (to Feb 2021)



**+22**

**Tourism Sentiment Score**  
February 2022 (Month)  
+2pts (to Feb 2021)



# Key Visitor Data



## DOMESTIC

- Auckland remained in the Red light setting during February. In this setting, people can still travel around NZ with certain conditions (e.g., face masks, vaccine passes, social distancing, capacity limits and Covid tracing).
- The year to February 2022 saw 4.74m domestic visitors to Auckland.
- There were 417.5k domestic visitors in the month of February 2022, a decrease of 12.2%.
- Of Auckland's domestic visitor drive markets, visitation from Waikato was highest for the year-ending February 2022 (with 1.37m domestic visitors) and also for the month of February (128.0k, down 9.5%).
- The other two drive markets were down for the month of February: Bay of Plenty (52.2k visitors, down 14.9%), and Northland (85.6k visitors, down 7.2%).
- In our main domestic fly markets, visitors from Wellington (26.9k visitors, down 33.7%) and Christchurch (29.9k visitors, down 16.7%) were also down for the month.
- On average, domestic visitors stayed in Auckland for 3.4 nights in February 2022 (up 5.1% on the previous year).
- There were 170.3k domestic guest nights in commercial accommodation for the month of February, down 23.4%.
- Domestic tourism transactions for the year to February 2022 was \$1.79b, up 1.1% on last year and \$142m for the month (down 3.9% compared to February 2021).

## INTERNATIONAL

- The impact of the Covid-19 related travel bans is evident with a sharp drop in international arrivals starting in February 2020 and 'flatlining' from April 2020 onwards.
- The year-end figures were affected, with 141.5k international visitor arrivals - a decrease of 14.5% on the previous year to February.
- Monthly international visitor arrivals (4,697) were also down 6.2% on the previous February.
- Australian visitor arrivals (102.3k) were down 83.5% for the year to February compared to last year.
- VFR visitors contributed the most to annual visitor numbers (86.4k) but fell 52.5% on the year to February 2021. Monthly VFR numbers were also down 20.8% compared with the month of February 2021.
- There were 13.8k visitor arrivals in summer 2022, down 10.7% on the previous summer.
- 13.4k international guest nights in commercial accommodation for February, down 29.8% on last year.
- Other tourism transactions was \$0.37b for the year, up 5.5% on last year and \$36m for the month of February (up 46.3% on last February).

## OVERALL

- February Occupancy was 29.7%, down 12.9pts on February 2021. The ADR was \$167 (down 8.1%) and the RevPAR was \$49 (down 36.1%).
- For the month of February 2022, there were 183.6k total guest nights in commercial accommodation in Auckland (down 23.9% on last year).
- There were 897.8k room nights booked in entire place short-term rental listings in Auckland in the year to February 2022, down 5.4% on the previous year.
- Looking forward into 2022, occupancy levels from late-April through to the end of June this year currently exceed last years' occupancy levels.
- This year, Occupancy on the books peaked on Saturday 16th April (Easter weekend), where occupancy reached 45%.
- The Tourism Sentiment Score for Auckland for February 2022 was +22 (-1 than NZ), up 2 points on Feb 2021.
- Categories with the highest sentiment were Destination Services (33), Food and Culinary (28), and Culture and History (27), while Access and Transportation (8) and Amenities and Entertainment (14) had the lowest sentiment.
- For domestic visitors in YE December 2021, the Net Promoter Score (NPS) was +2, down 3 points on YE September 2021.

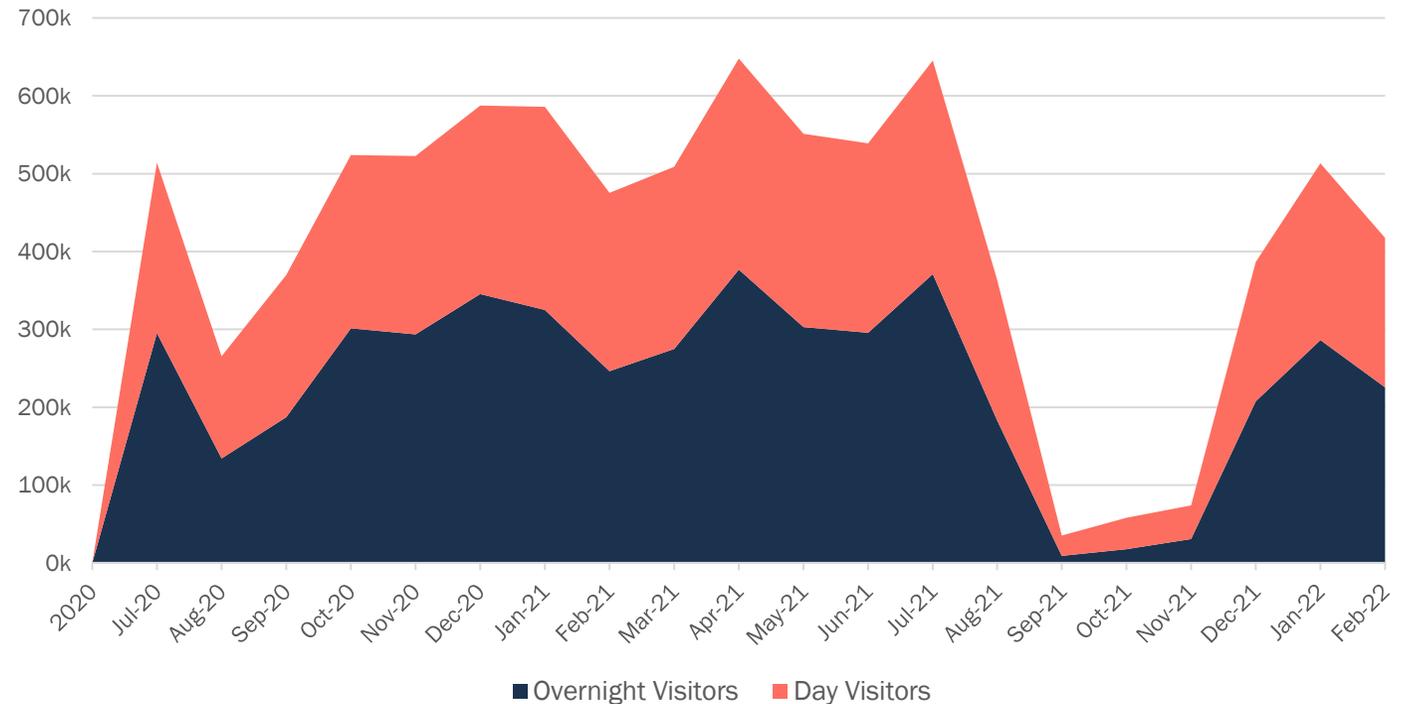


# Auckland Tourism – Visitor Arrivals Data

# 4.74m Domestic visitors in YE February 2022

- Over the last 24 months, the domestic market has fluctuated in correlation with the regional and national Covid-related lockdowns.
- Auckland remained in the Red light setting during February.
- The year to February 2022 saw **4.74m** domestic visitors to Auckland.
- There were **417.5k** domestic visitors to Auckland in the month of February 2022, a decrease of 12.2% on the previous February.
- The number of overnight visitors (225.6k, down 8.5%) and day visitors (191.9k, down 16.2%) visiting Auckland in the month of February 2022 fell in comparison to February 2021.

Domestic Visitors to Auckland

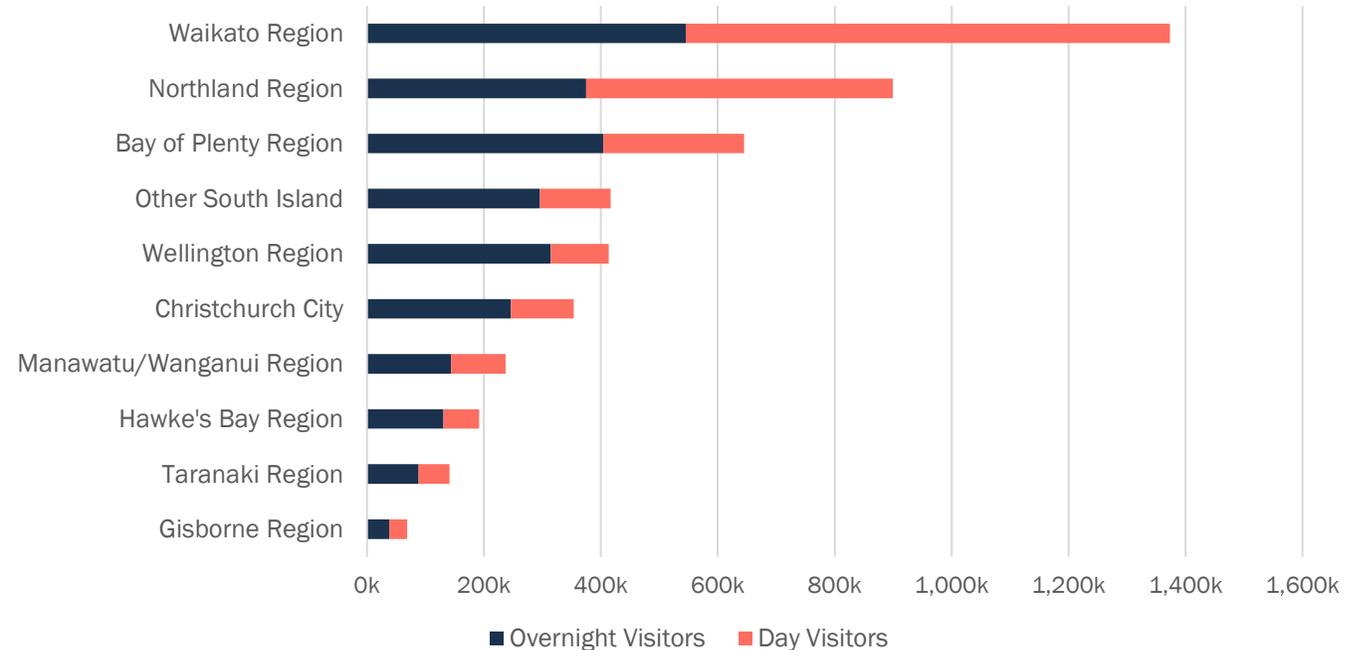


	Total Domestic Visitors	vs. previous year / YE
February 2022	417,536	-12.2%
YE February 2022	4,740,702	N/a

# 1.37m Waikato visitors to Auckland in the year to February 2022

- Of Auckland’s domestic visitor drive markets, visitation from Waikato was highest for the year-ending February 2022 (with 1.37m domestic visitors) and also for the month of February (128.0k, down 9.5%).
- The other two drive markets were down for the month of February: Bay of Plenty (52.2k visitors, down 14.9%), and Northland (85.6k visitors, down 7.2%) when compared to February 2021.
- In our main domestic fly markets, visitors from Wellington (26.9k visitors, down 33.7%) and Christchurch (29.9k visitors, down 16.7%) were also down for the month compared to last year.

Domestic Visitors to Auckland, by origin (YE)

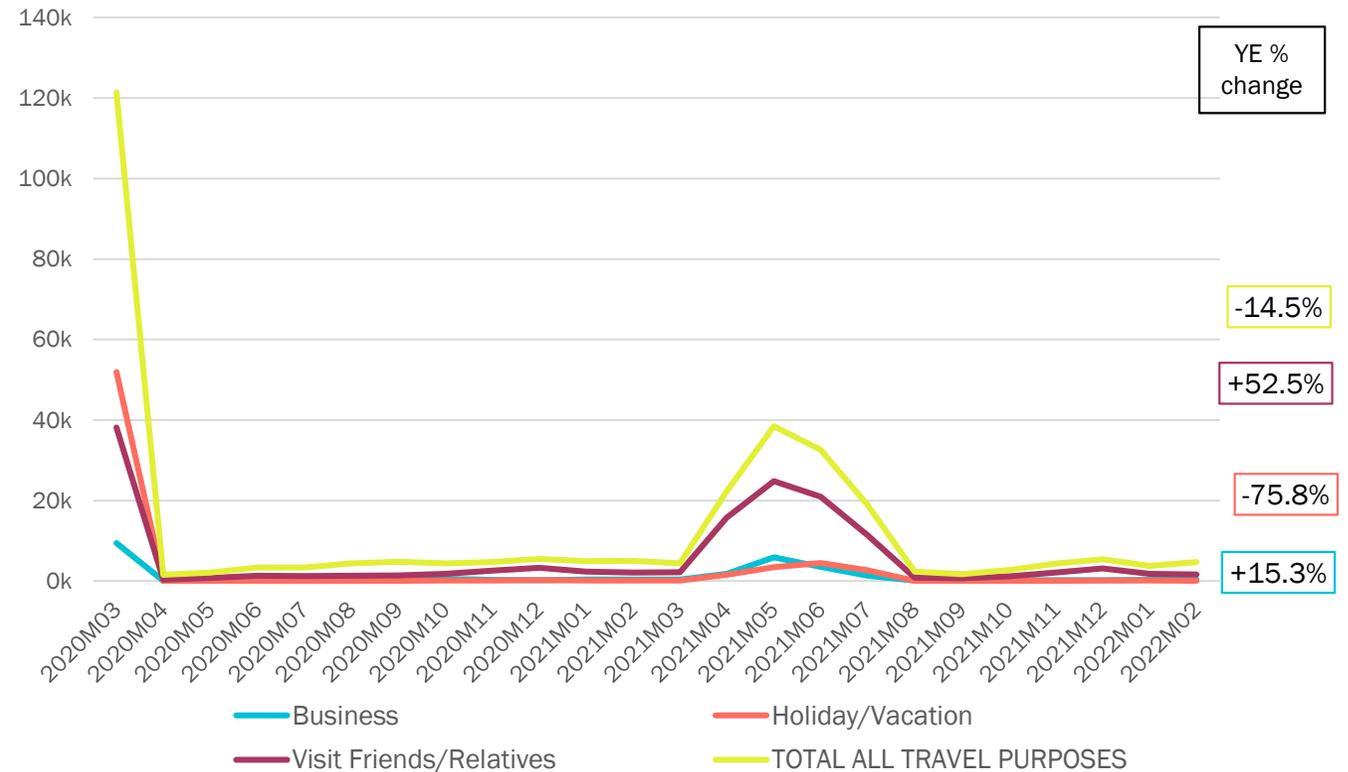


	Waikato	vs. previous year	Northland	vs. previous year	Bay of Plenty	vs. previous year	Wellington	vs. previous year	Christchurch	vs. previous year
February 2022	127,954	-9.5%	85,600	-7.2%	52,155	-14.9%	26,922	-33.7%	29,948	-16.7%
YE February 2022	1,373,201	N/a	899,151	N/a	645,040	N/a	413,687	N/a	353,630	N/a

# International visitor arrivals were down in February 2022

- The impact of the Covid-19 related travel bans can be seen clearly, with strong declines starting in February 2020 and ‘flatlining’ from April 2020 onwards.
- The year to February 2022 saw 141.5k international visitor arrivals, a decrease of 14.5% on the previous year.
- The month of February saw 4,697 international visitors, down 6.2% on the previous February.
- VFR visitors contributed the most to annual visitor numbers (86.4k) but fell 52.5% on the year to February 2021. Monthly VFR numbers (1,652) were also down 20.8% compared with the month of February 2021.

International visitor arrivals in Auckland, reason for visit



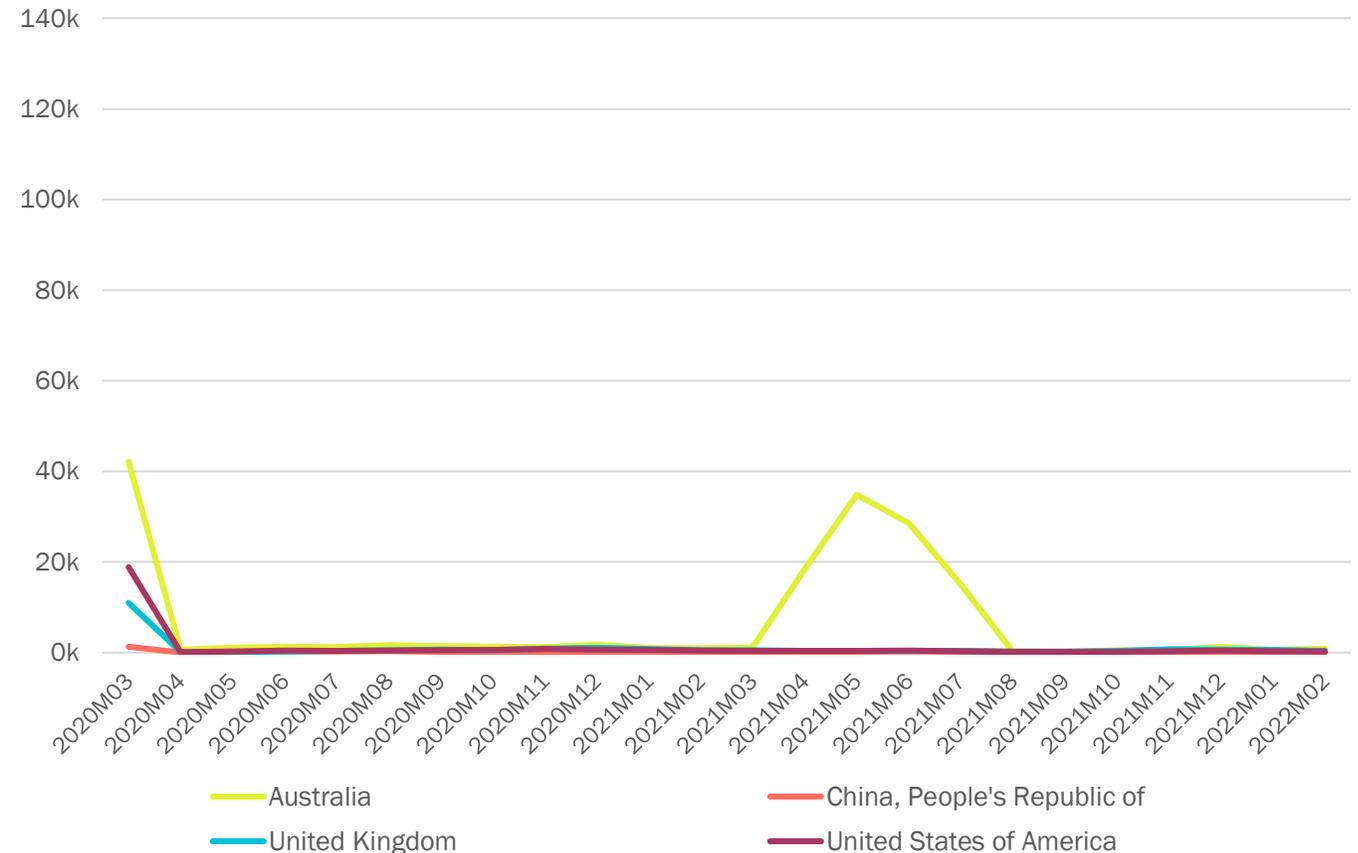
	Visitor arrivals	vs. previous year / YE
February 2022	4,697	-6.2%
YE February 2022	141,520	-14.5%

# 102.3k Australian visitor arrivals in the year to February 2022

- China was the first country for which a visitor ban was implemented as early as February 2020 and a corresponding downward arrival trend can be observed. The other key markets came to a halt with the full travel ban in April 2020.
- There was a sharp increase in Australian visitor arrivals in April 2021, when the trans-Tasman travel bubble between Australia and NZ opened. However, the preceding Lockdowns and Alert Level travel restrictions have since put a halt to Australian visitation.
- For the year to February 2022, Australian visitor arrivals (102.3k) fell 83.5% compared to last February, with monthly arrivals (888) also down (8.2%).
- YE February 2022 visitors from China were down (54.1%), and down (64.4%) for the month of February.
- Both the US and the UK showed similar levels of decline.

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Visitor arrivals in Auckland by key international markets

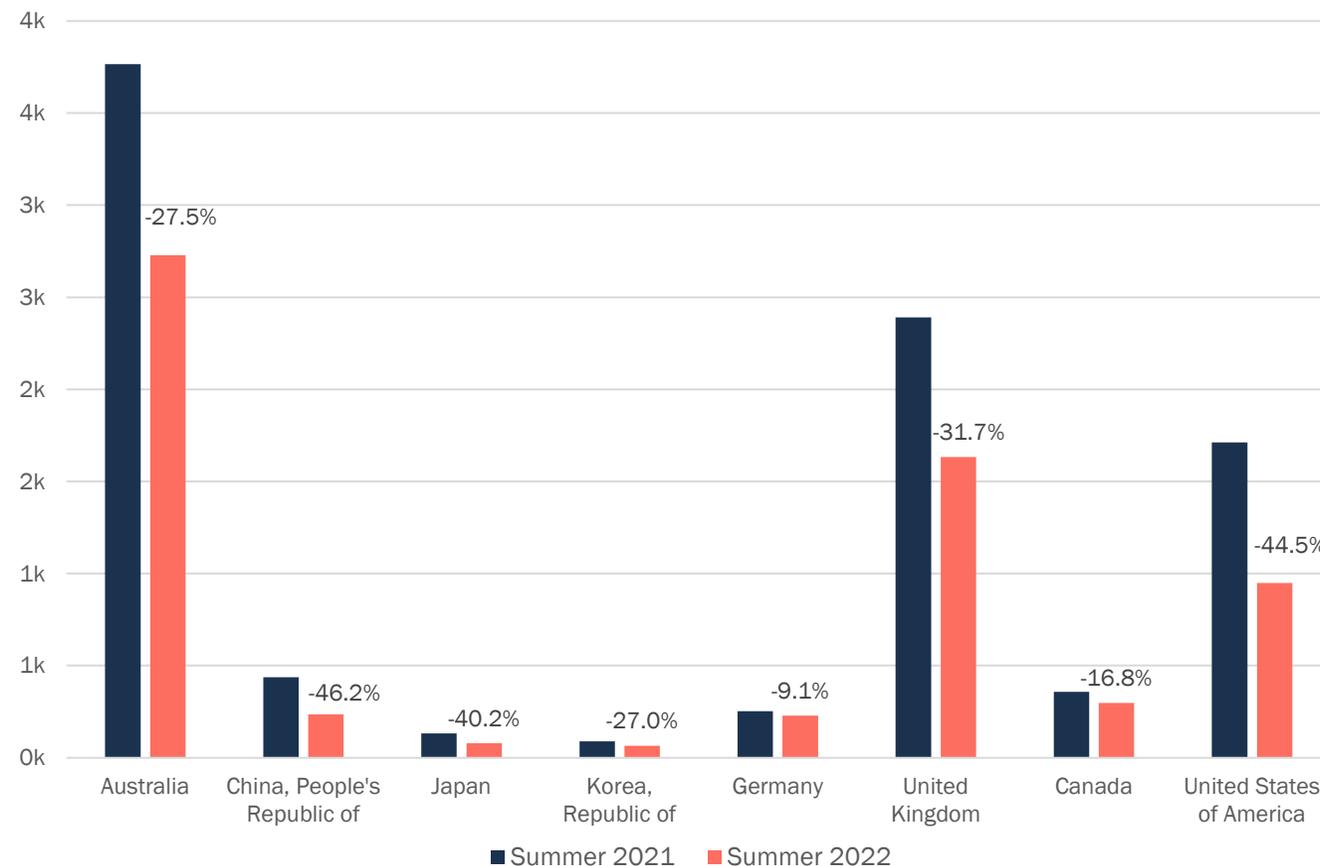


## Visitor arrivals in summer 2022 were down 10.7% on last summer

- There were 13.8k visitor arrivals in summer 2022, down 10.7% on the previous summer.
- VFR (down 15.0%), holiday (down 16.4%) and business (down 14.6%) arrivals were down compared to summer 2021.
- Visitation from Australia (down 27.5%) decreased in comparison to the previous summer.
- This summer, visitation from all other markets was down compared to last summer.

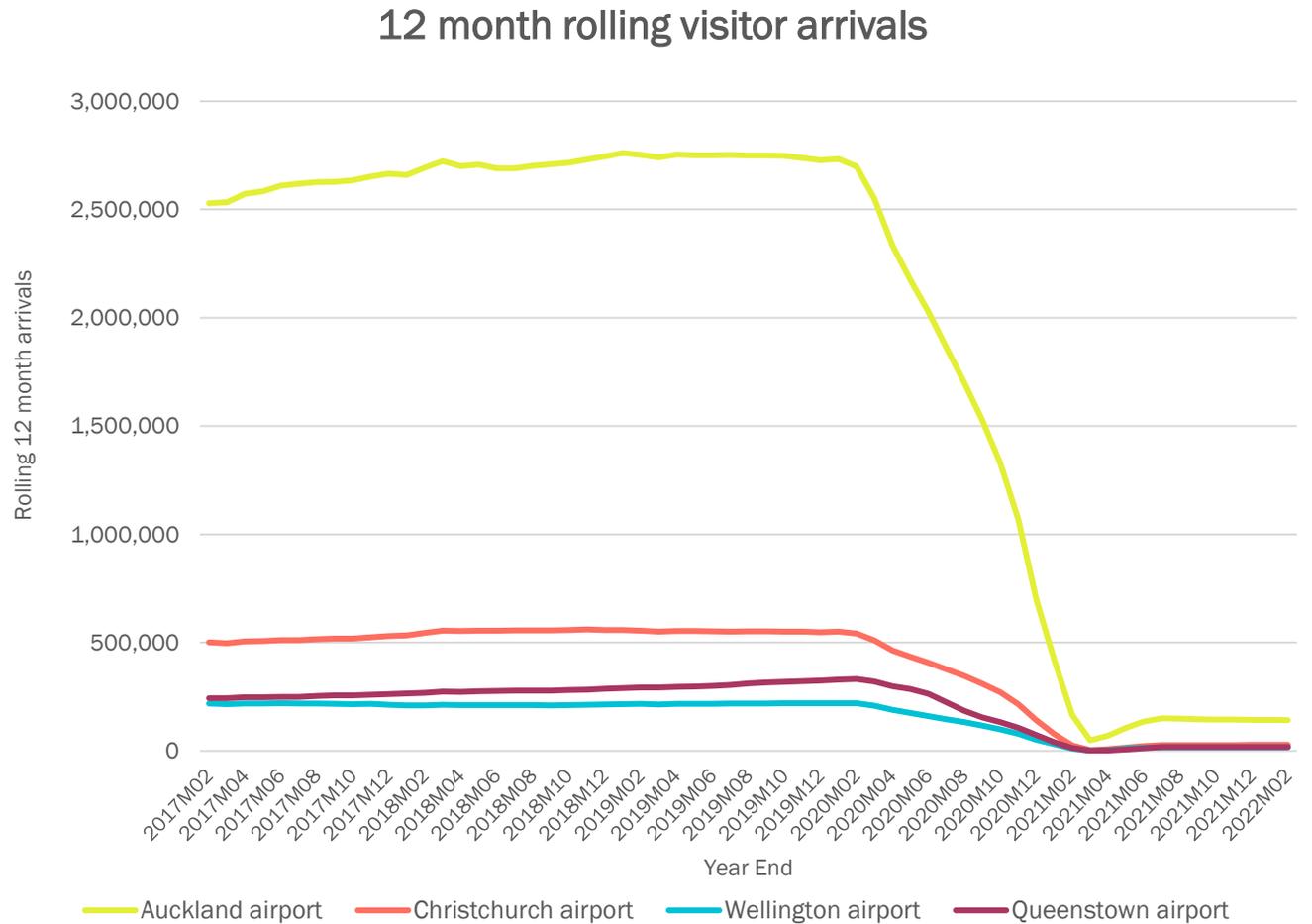
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Seasonal arrivals in Auckland by key markets



# Auckland has seen a 14.5% drop 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 travel bans have had a clear effect on all ports with the greatest impact seen in Auckland reflecting the largest market share.
- Auckland has seen a 14.5% drop in international visitor arrivals over the last year.



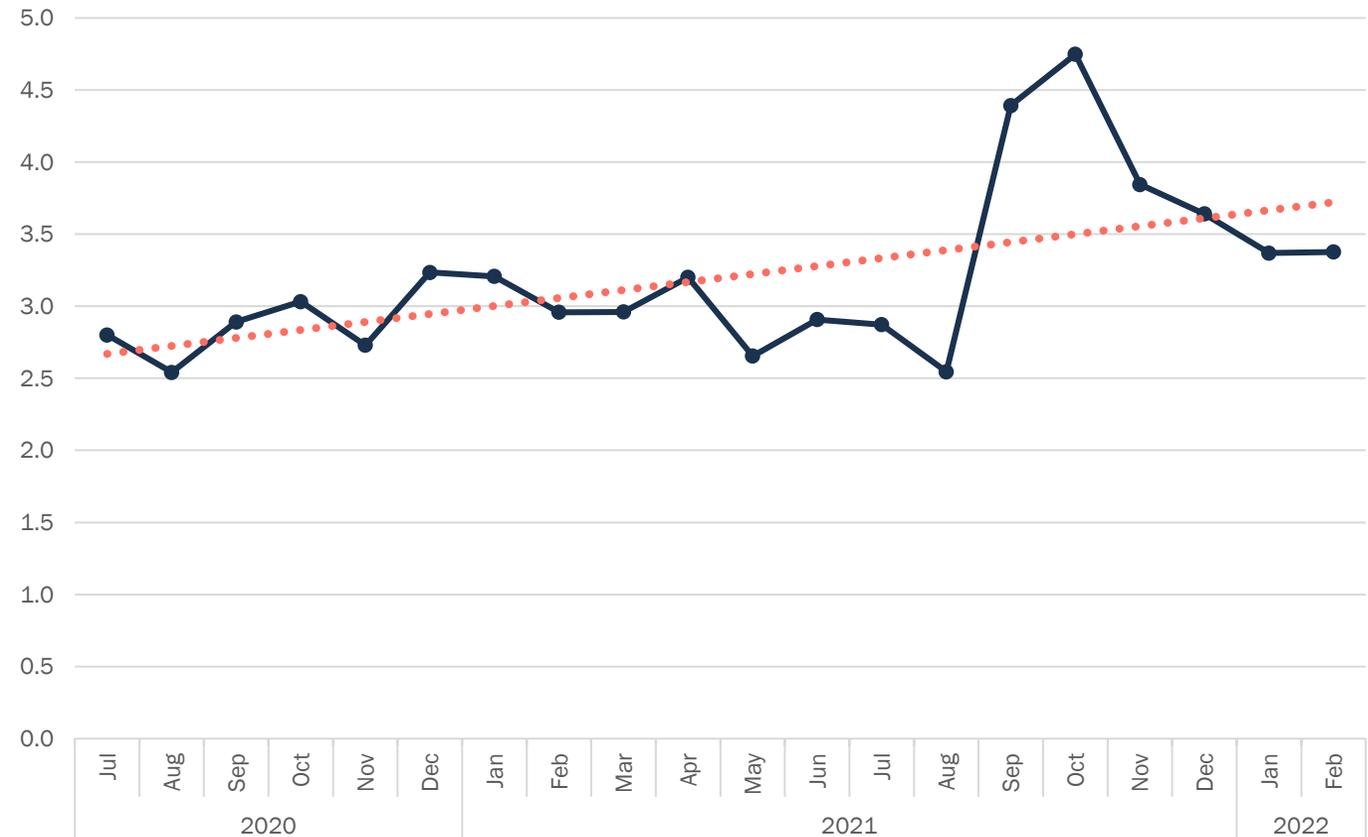


# Auckland Tourism – Accommodation Data

# On average, domestic visitors stayed 3.4 nights in Auckland for February 2022

- On average, domestic visitors stayed in Auckland for **3.4 nights** in the month of February 2022 (up 5.1% on the previous year).
- There has been a slight upward trend in the average length of stay for domestic visitors to Auckland over the last 24 months.
- Although domestic visitation has been varied, domestic visitors are staying in Auckland for longer periods of time.

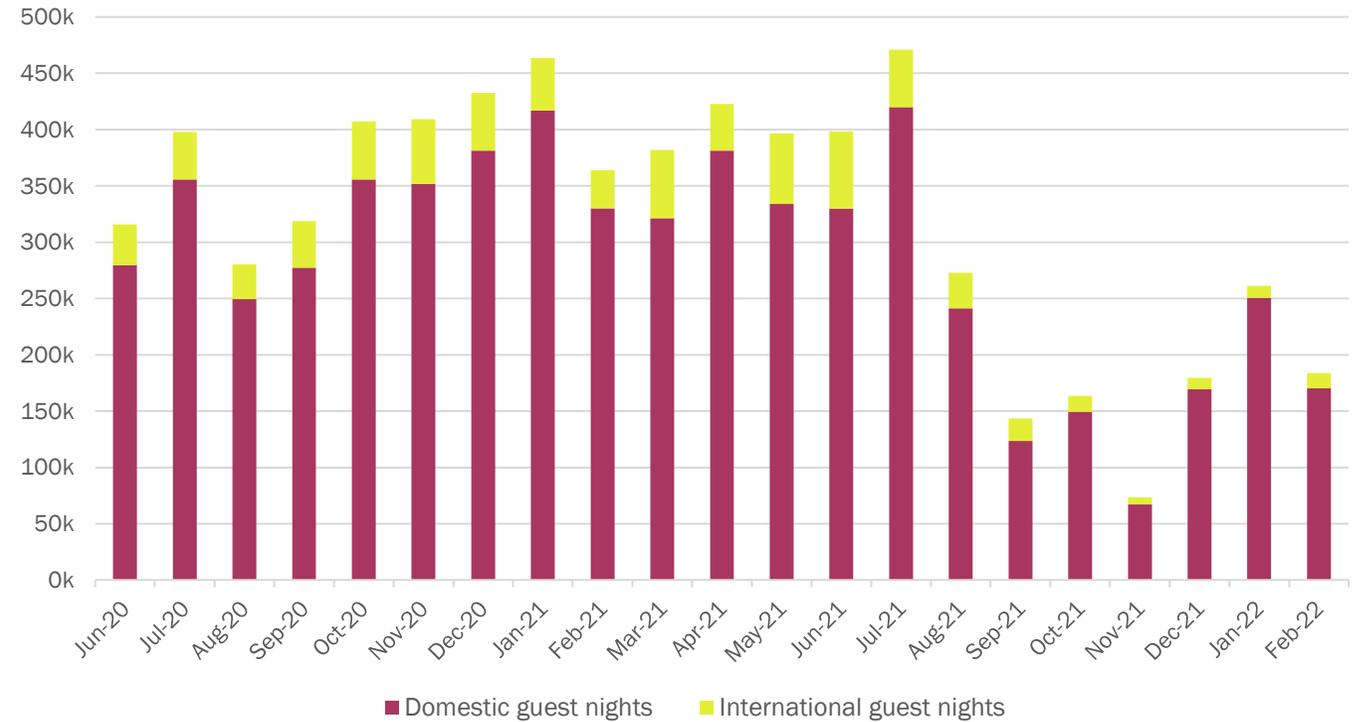
Average length of stay – Domestic Visitors



# 170.3k domestic guest nights in commercial accommodation in February 2022, down 23.4%

- For the month of February 2022, there were **183.6k total guest nights** in commercial accommodation in Auckland, down **23.9%** on the same month last year.
- There were **170.3k domestic guest nights** in commercial accommodation (down 23.4%), and **13.4k international guest nights (down 29.8%)** in commercial accommodation in February 2022.
- For New Zealand overall, there were 1.80m guest nights in commercial accommodation, down 21.9% compared to February 2021.

Guest nights in commercial accommodation - Auckland

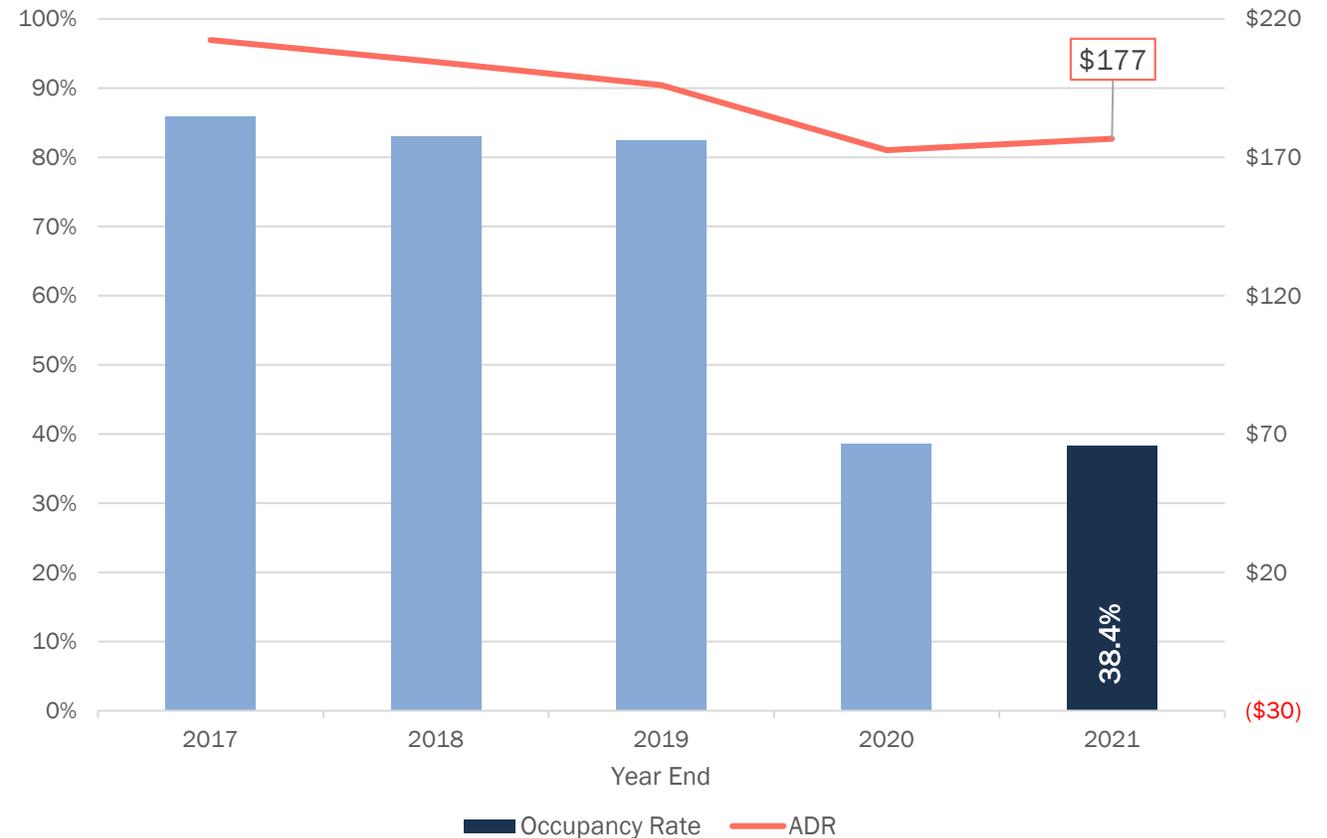


February 2022	Auckland	% change	New Zealand	% change
Total guest nights	183,600	-23.9%	1,798,100	-21.9%
Domestic guest nights	170,300	-23.4%	1,737,800	-21.3%
International guest nights	13,400	-29.8%	60,300	-36.1%

# YE February 2022 Occupancy was 38.4%

- Covid also affected the year-end average hotel occupancy rate, which was **38.4%** for the **year to February 2022**, with a **decrease of 0.2pts** compared to the previous year-end.
- The average daily rate (ADR) for hotels in the year to February 2022 was **\$177 up 2.4%** on the previous year.
- The **RevPAR** for the year ending February 2022 was **\$68 up 2.0%** on the previous year.
- **February Occupancy** was **29.7%**, **down 12.9pts** on February 2021. The **ADR** was **\$167 (down 8.1%)** and the **RevPAR** was **\$49 (down 36.1%)**.

Annual Hotel Accommodation in Auckland Occupancy and Average Daily Rate



## Occupancy peaked on the 1<sup>st</sup> February 2022

- A quarter (26%) of the hotels covered here are in fact, isolation hotels.
- Average Daily Rate (ADR) was on average 8.8% higher compared with February last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in February 2022. Occupancy peaked on Tuesday 1<sup>st</sup> February, while RevPAR peaked on Saturday 5<sup>th</sup> February, and ADR peaked on Thursday 17<sup>th</sup> February 2022.

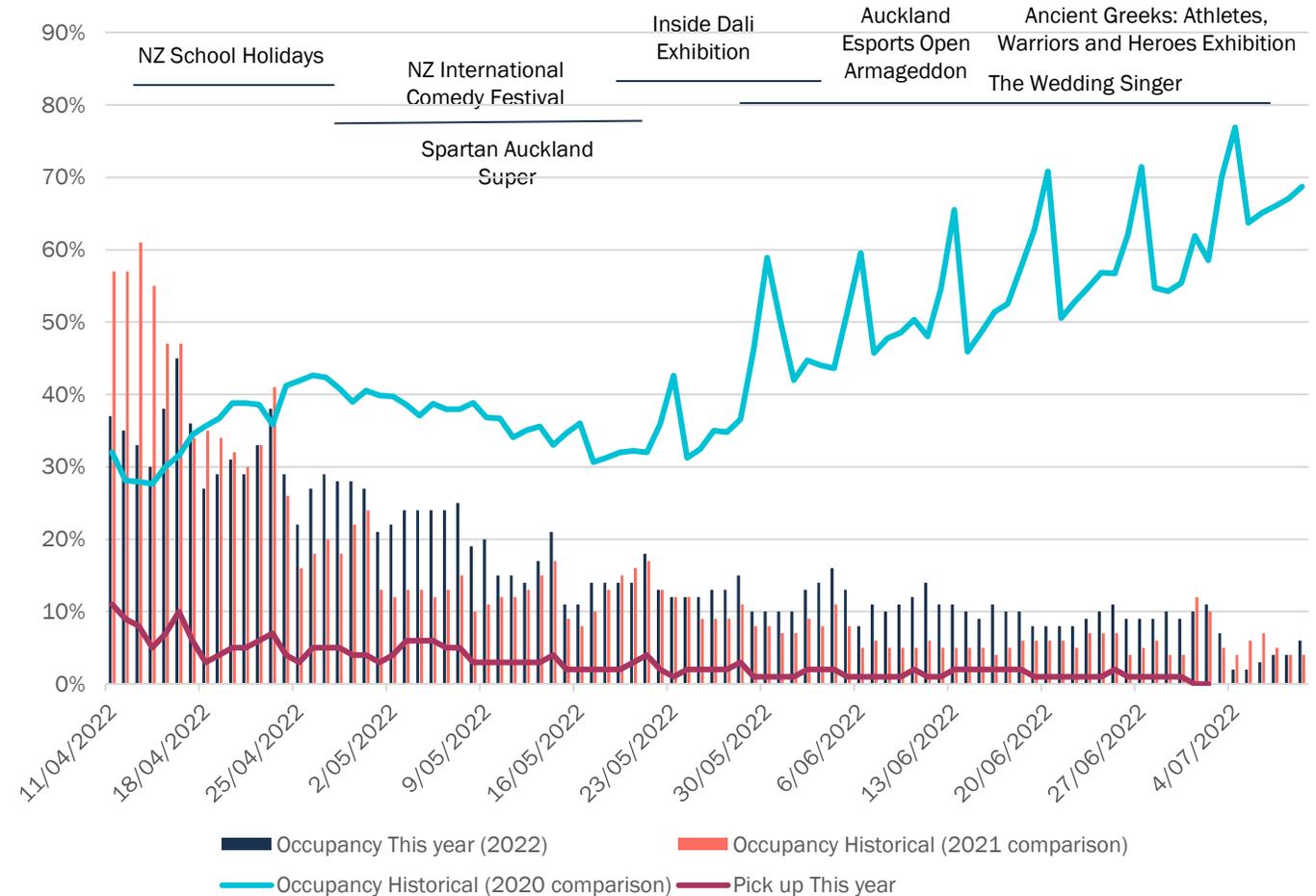
Percent Changes for the Month of February



# 90 Day Forward Booking Occupancy Data

- Looking forward into 2022, accommodation occupancy on the books is lower during mid-April and early July this year compared to the same periods last year.
- However, occupancy levels from late-April through to the end of June this year currently exceed last years' occupancy levels.
- This year, Occupancy on the books peaked on Saturday 16<sup>th</sup> April (Easter weekend), where occupancy reached 45%.

### Occupancy - 90 Day Forward Outlook



# 47.7k entire place short-term rental listings available for YE February 2022

- AirDNA collects active short-term vacation rental data from hundreds of sources (e.g. Airbnb) to build a comprehensive view of the short-term rental market. For Auckland, this is dominated by **Airbnb** related data.
- Auckland short-term rental listings grew strongly in 2016 and then plateaued (on average) from 2017 onwards.
- The number of available listings has dropped since February 2020, most likely in response to the travel bans and lockdowns.
- Entire place available listings for the year (47.7k, down 15.3%) and month (3,661, down 14.1%) were down on the previous February.
- Private room available listings for the year (20.7k, down 23.5%) and month (1,481 down 29.4%) were also down.

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Monthly short-term rental Available Listings in Auckland



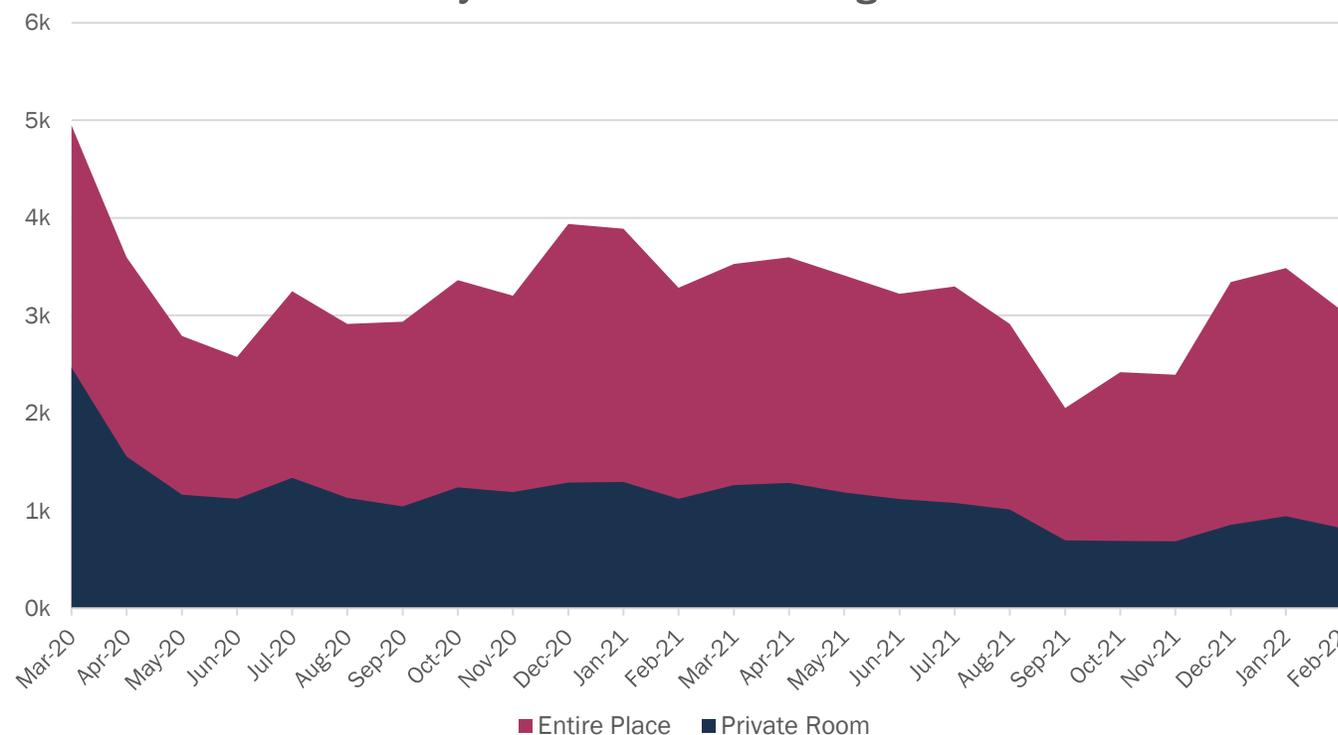
	Entire Place	vs. previous year/ YE	Private Room	vs. previous year/ YE
February-2022	3,661	-14.1%	1,481	-29.4%
YE February 2022	47,656	-15.3%	20,742	-23.5%

# 36.7k entire place booked listings on the short-term rental market for YE February 2022

- There were 36.7k entire place booked listings on the short-term rental market in Auckland in the year to February 2022, down 9.7% on the previous year.
- For the month of February, entire place booked listings (3,058) were down 6.9% compared to February 2021.
- For the year ending February 2022, private room booked listings (11.6k) were down 27.0%.
- For the month of February, private room booked listings (822) were down 26.8% compared to the previous year.

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Monthly Airbnb Booked Listings in Auckland



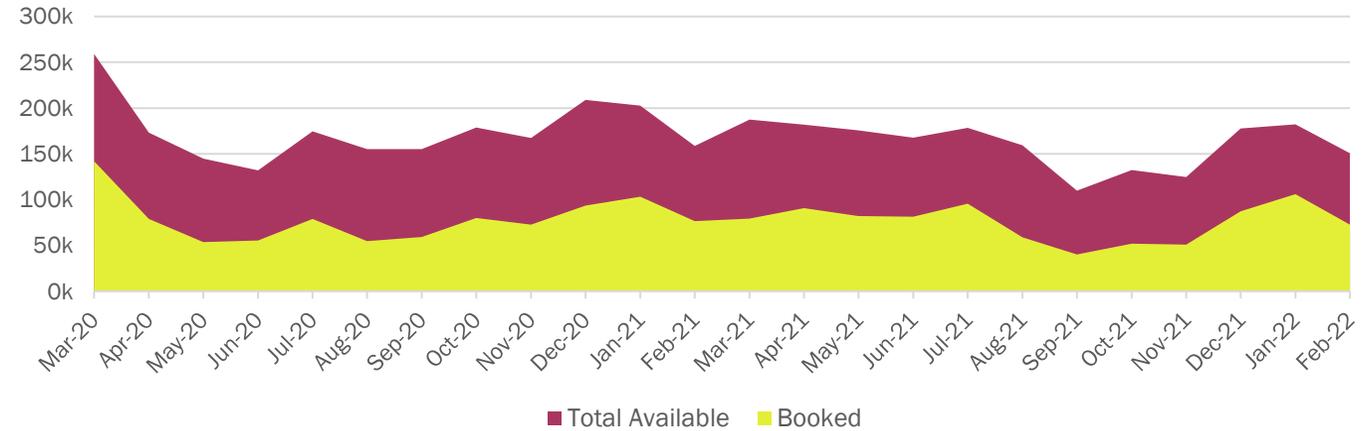
	Entire Place	vs. previous year/ YE	Private Room	vs. previous year/ YE
February-2022	3,058	-6.9%	822	-26.8%
YE February 2022	36,726	-9.7%	11,641	-27.0%

# 72.7k room nights booked in entire place short-term listings in Feb 2022, down 5.1%

- There were 897.8k room nights booked in entire place short-term rental listings in Auckland in the year to February 2022, down 5.4% on the previous year.
- For the month of February, room nights booked in entire place listings (72.7k) were down 5.1% on February 2021.
- For the year ending February 2022, room nights booked in hotel comparable listings (185.0k) were down 11.2%.
- For the month of February, there were 14.3k room nights booked in hotel comparable listings, down 11.0% compared to the previous February.
- *Hotel Comparable Listings are Studio and one-bedroom entire place rentals that are most likely to compete directly with hotels.*

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Short-term rental Entire Place Room Nights in Auckland



Short-term rental Hotel Comparable Room Nights in Auckland



# 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.
- We are unable to report average length of stay for domestic visitors as the AA Traveller Monitor survey has also recently been discontinued.
- Once an alternative dataset becomes available, we will commence reporting on this.





  
**ROBE**

  
**ROBE**

**Auckland Tourism – Spend Data**

# \$1.79b in Domestic tourism transactions for YE Feb 2022, up 1.1%

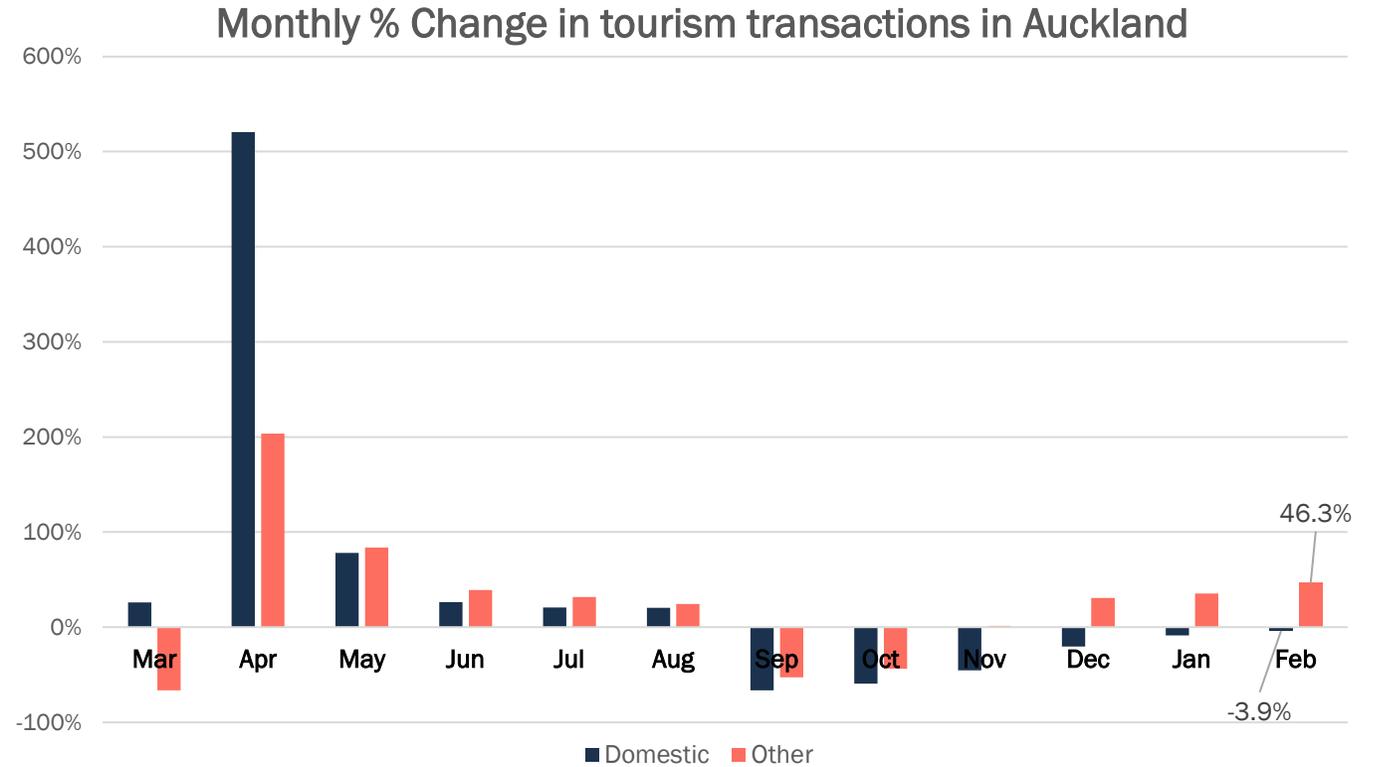
- Looking back on the last 24 months, Domestic tourism transactions have fallen in correlation with each of Auckland’s regional lockdowns i.e., in April and August 2020, and again in February 2021 and August through to September in 2021.
- Auckland remained in the Red light setting during February 2022.
- In the year to February 2022, Domestic tourism transactions were \$1.79b (up 1.1%) while Other tourism transactions were \$0.37b, up 5.5% 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](#).



Tourism Transactions	YE February 2022 (\$b)	% change
Domestic	1,791	1.1%
Other	374	5.5%

# Domestic tourism transactions were \$142m for February 2022, down 3.9%

- For the month of February 2022, domestic tourism transactions (TECTs) were \$142m, down 3.9% compared with the same month in 2021.
- Other tourism transactions in February 2022 were \$36m (up 46.3%) compared to February 2021.

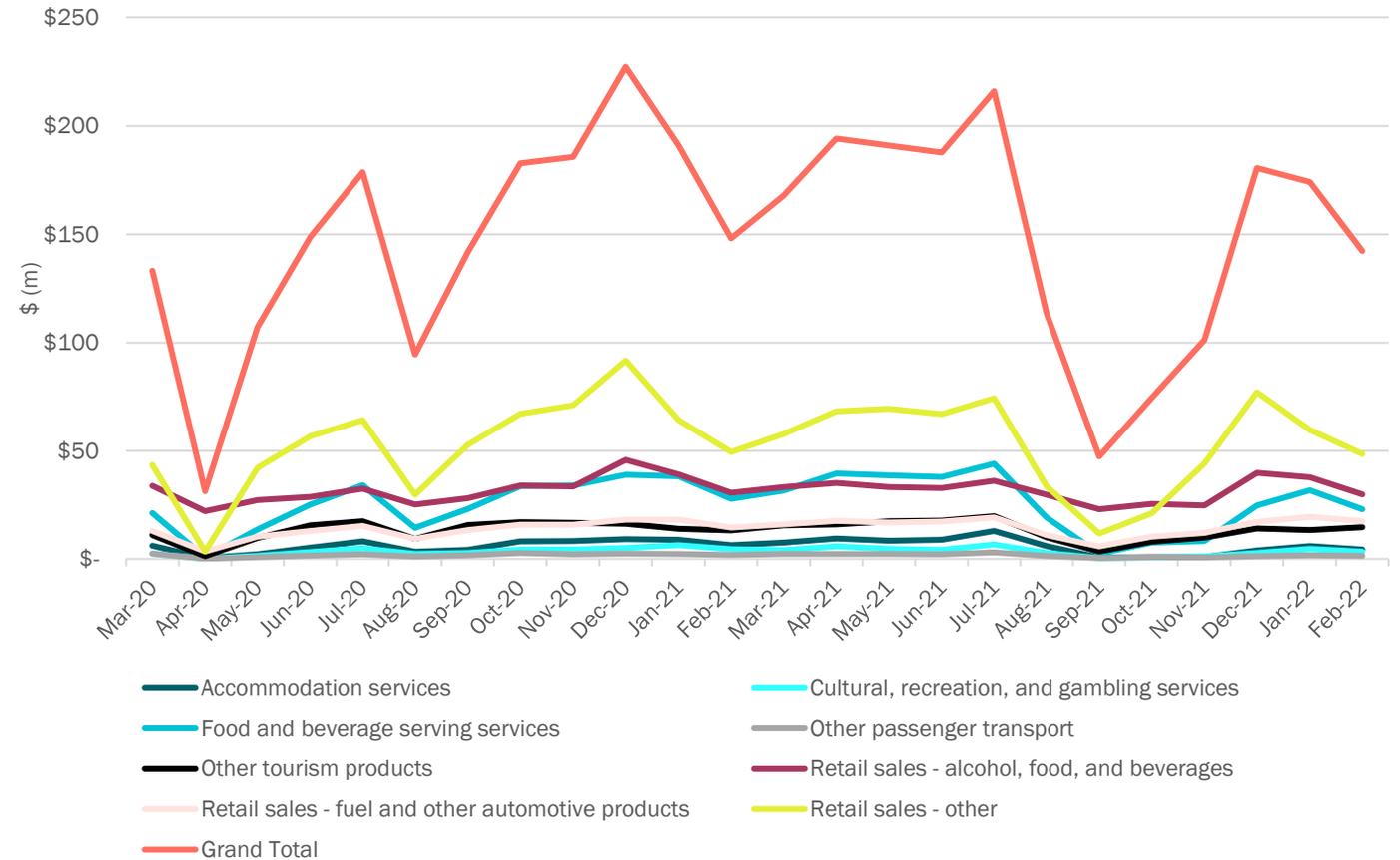


Tourism Transactions	February 2022 (\$m)	% change
Domestic	142	-3.9%
Other	36	46.3%

# Domestic transactions in Retail sales - fuel and other automotive products were up 20.2%

	Spend (\$m)	% change
Accommodation services	4.3	-31.8%
Cultural, recreation, and gambling services	3.2	-26.3%
Food and beverage serving services	23.0	-17.4%
Other passenger transport	1.3	-25.4%
Other tourism products	14.6	10.7%
Retail sales - alcohol, food, and beverages	29.8	-2.5%
Retail sales - fuel and other automotive products	17.4	20.2%
Retail sales - other	77.1	-1.9%
<b>Grand Total</b>	<b>142.3</b>	<b>-3.9%</b>

Domestic monthly tourism transactions in Auckland, by product







# **Auckland Tourism – Major and Business Events Data**

# Major Events Insights



Event	Date	Venue	Interesting Findings
MeINet New Zealand Melanoma Summit VIRTUAL	11 - 13 February 2022	VIRTUAL	<ul style="list-style-type: none"> <li>▪ The month of February 2022 saw 417.5k domestic visitors to Auckland.</li> </ul>
Bean Rock Swim	12 February 2022	Mission Bay Beach	<ul style="list-style-type: none"> <li>▪ There were 170.3k domestic guest nights in commercial accommodation for the month of February 2022.</li> <li>▪ Domestic tourism transactions (TECTs) were \$142m for the month of February 2022.</li> </ul>
APO: Magnificent Mendelssohn	17 February 2022	Auckland Town Hall	<ul style="list-style-type: none"> <li>▪ On average, domestic visitors stayed in Auckland for 3.4 nights in February 2022 (up 5.1% on the previous year).</li> </ul>
IPWEA NZ Excellence Awards VIRTUAL	24 February 2022	VIRTUAL	

# Business Events Insights



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# 16

Business events in Auckland  
Q4 December 2021



# 2.6<sup>k</sup>

Delegates in Auckland  
Q4 December 2021



# 10.5<sup>k</sup>

Delegate days in Auckland  
Q4 December 2021



# 2.0%

Auckland's market share of  
business events  
Q4 December 2021



# 4.0%

Auckland's market share of  
delegates  
Q4 December 2021



# 13.0%

Auckland's market share of  
delegate days  
Q4 December 2021





# Auckland Tourism – Tourism Sentiment Index

## Tourism Sentiment Index (TSI)

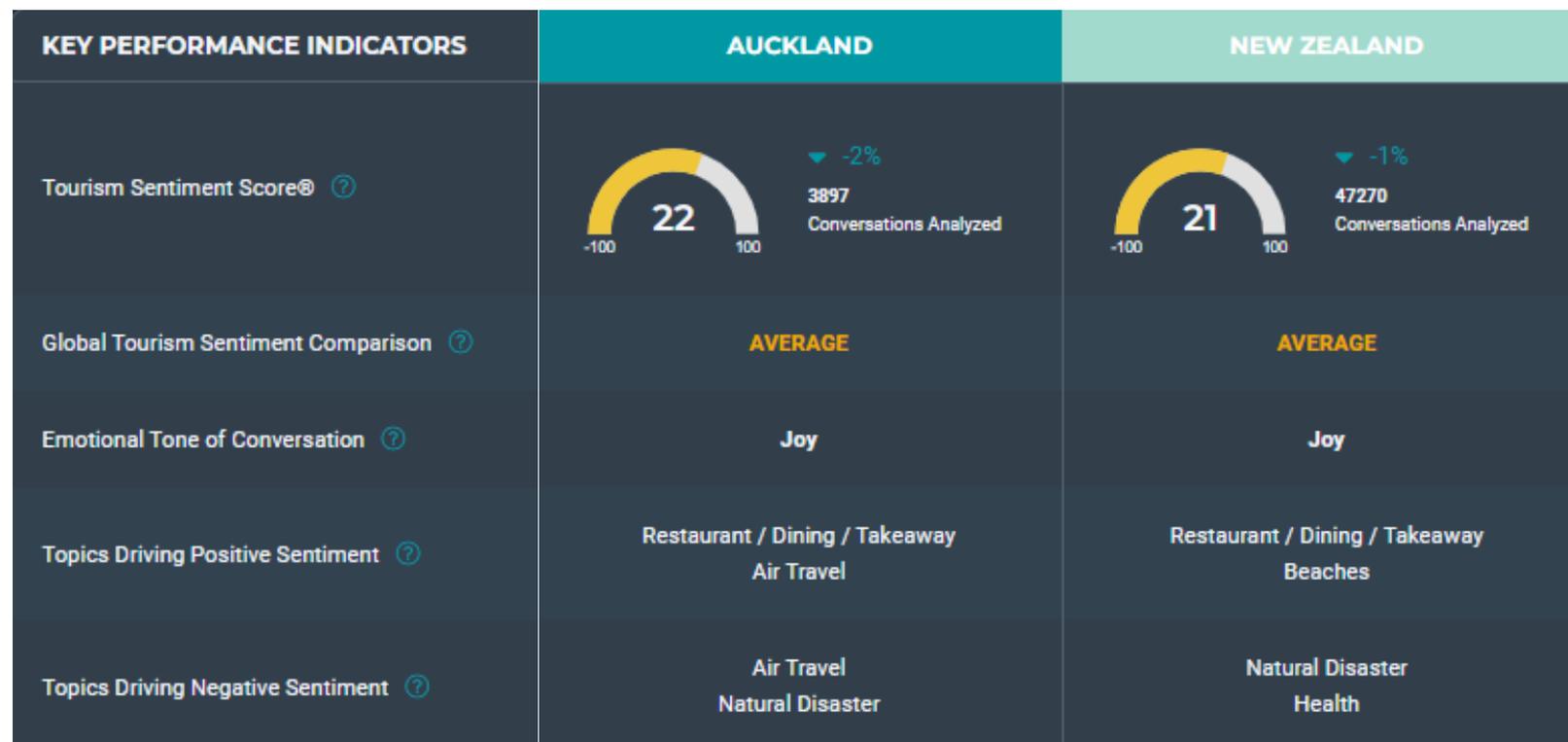
- The Tourism Sentiment Index (TSI) is a measure of a destination's ability to generate positive word of mouth about its tourism offering.
- It is an aggregate score (ranging from -100 to +100) that focuses on online conversations and measures attitudes and overall perceptions of Auckland's tourism offering.
- 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 February 2022 was +22 (+1pt above NZ), up 2 points on February 2021.
- Of all conversations online being driven by Auckland’s tourism experience or products, 25% of those conversations were identified as destination promoters.
- This includes 3,897 online conversations about Auckland (down 2%), while 47,270 online conversations were included for NZ (down 1%).
- 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 ‘Air Travel’, while negative sentiment was driven by ‘Air Travel’ and ‘Natural Disaster’.

[aucklandunlimited.com](http://aucklandunlimited.com)



## 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 February 2022 were Access and Transportation (23%), followed by Outdoor Activities (17%), and Food and Culinary (16%).
- Categories with the highest sentiment were Destination Services (33), Food and Culinary (28), and Culture and History (27), while Access and Transportation (8) and Amenities and Entertainment (14) had the lowest sentiment.
- Sub-categories that drove positive sentiment were Skiing and Snowboarding (67), Breweries and Pubs (50), Indigenous Cultural Attractions (44), and Weddings (43).
- The lowest sentiment was recorded in Motorsports (-6), Taxis and ridesharing (3), Nightlife (6) and Religious Attractions (6).
- Auckland sentiment was higher in Safety (+10), Destination Services (+9), and Culture and History (+5) in comparison to NZ.
- Joy was the general emotional tone for most categories, while Sadness was related to Safety.

CATEGORIES	AUCKLAND			NEW ZEALAND		
	Volume	Emotion	Sentiment	Volume	Emotion	Sentiment
▲ Access + Transportation	23% ▲ 7%	Joy	8 Average	12% ▲ 2%	Joy	8 Average
▲ Outdoor Activities	17% ▼ 2%	Joy	22 Average	27% ▲ 4%	Joy	20 Average
▲ Food + Culinary	16% ▲ 1%	Joy	28 Average	11% ▲ 0%	Joy	27 Average
▲ Amenities + Entertainment	14% ▲ 0%	Joy	14 Average	12% ▲ 2%	Joy	20 Average
▲ Relaxation + Wellness	10% ▼ 2%	Joy	23 Average	9% ▼ 1%	Joy	25 Average
▲ Destination Services	7% ▼ 4%	Joy	33 High	7% ▼ 2%	Joy	24 Average
▲ Culture + History	7% ▲ 2%	Joy	27 Average	5% ▲ 0%	Joy	22 Average
▲ Safety	6% ▼ 3%	Sadness	15 Average	17% ▼ 4%	Joy	5 Average

# Tourism Sentiment Index Score Trends



- The Tourism Sentiment Index (TSI) Score trend line for Auckland has fluctuated from 1<sup>st</sup> March 2021 to 28<sup>th</sup> February 2022.
- Auckland TSI fell in March 2021 through to May after a lockdown in February. TSI then lifted in June – July but dropped again in August – September after another lockdown.
- TSI increased in October but fell in November and is back on the rise in February 2022.





# Auckland Visitor Survey



# Visitor Experience



[aucklandnz.com](http://aucklandnz.com)

 **30%**

Promoters  
Net Promoter Score  
YE December 2021  
-2



 **28%**

Detractors  
Net Promoter Score  
YE December 2021  
+1



 **2 NPS**

Total  
Net Promoter Score  
YE December 2021  
-3



 **7.3 / 10**

Total Satisfaction  
Overall experience in  
Auckland  
YE December 2021  
-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 Dec 2021, NPS was **+2**, (down 3points). The NPS for VFR visitors held (+3), and for those visiting Auckland for a holiday, vacation or short break, the NPS decreased 1 point (now +13).
- Quarterly results suggest Auckland's NPS has improved since Q3 2021 for some domestic visitor groups (in Q3 2021 Auckland entered a regional lockdown as a result of COVID-19). In Q4 2021, the NPS for VFR visitors increased 12 points (to +13) and for those visiting for a holiday, vacation or short break the NPS increased 16 points (to +18).
- **Domestic visitors most likely to recommend Auckland** as a visitor destination include those aged 30-44 years, Canterbury and Otago residents, those whose main reason to visit was for a conference, convention or other business event and those who included Northland in their itinerary.

PROMOTERS

30%

YE December 2021

-2

Compared to  
YE September 2021

DETRACTORS

28%

YE December 2021

+1

Compared to  
YE September 2021

TOTAL NPS

2

YE December 2021

-3

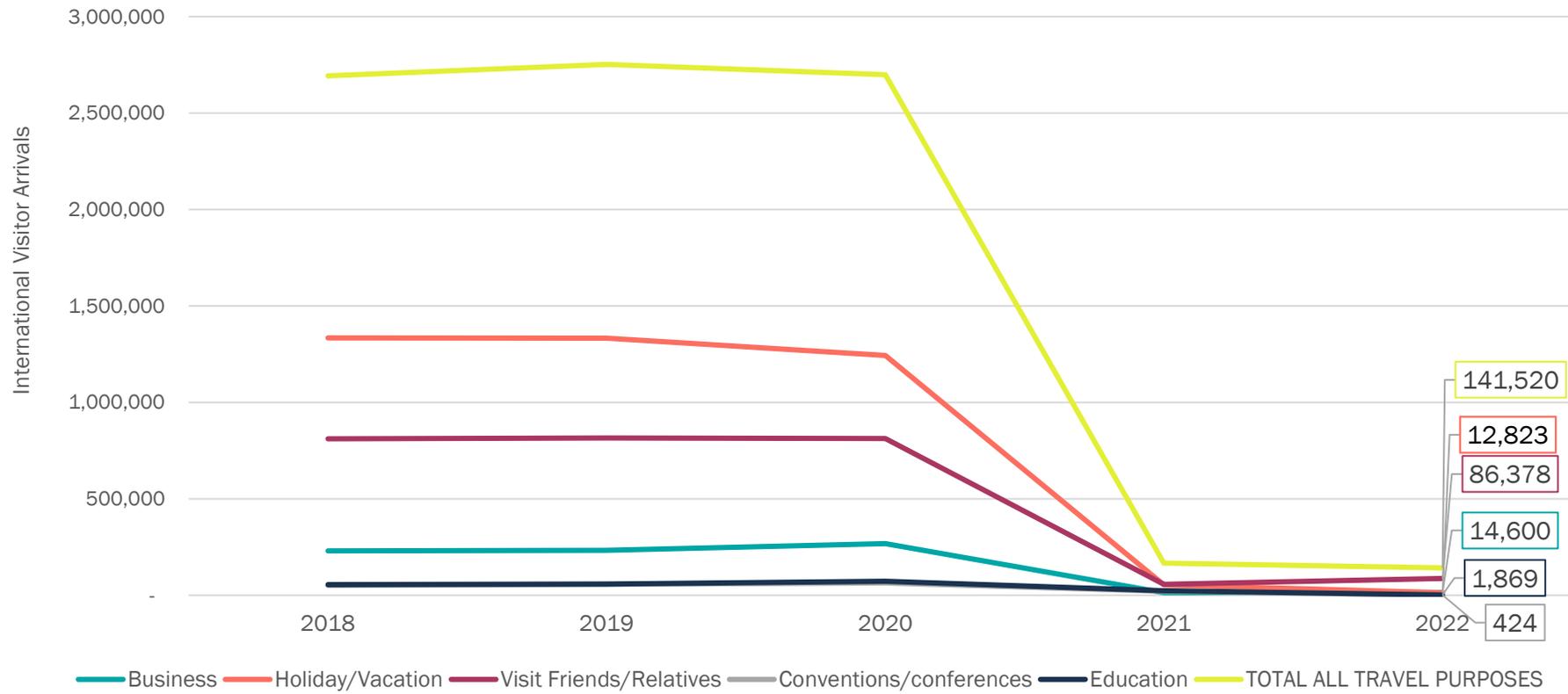
Compared to  
YE September 2021

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



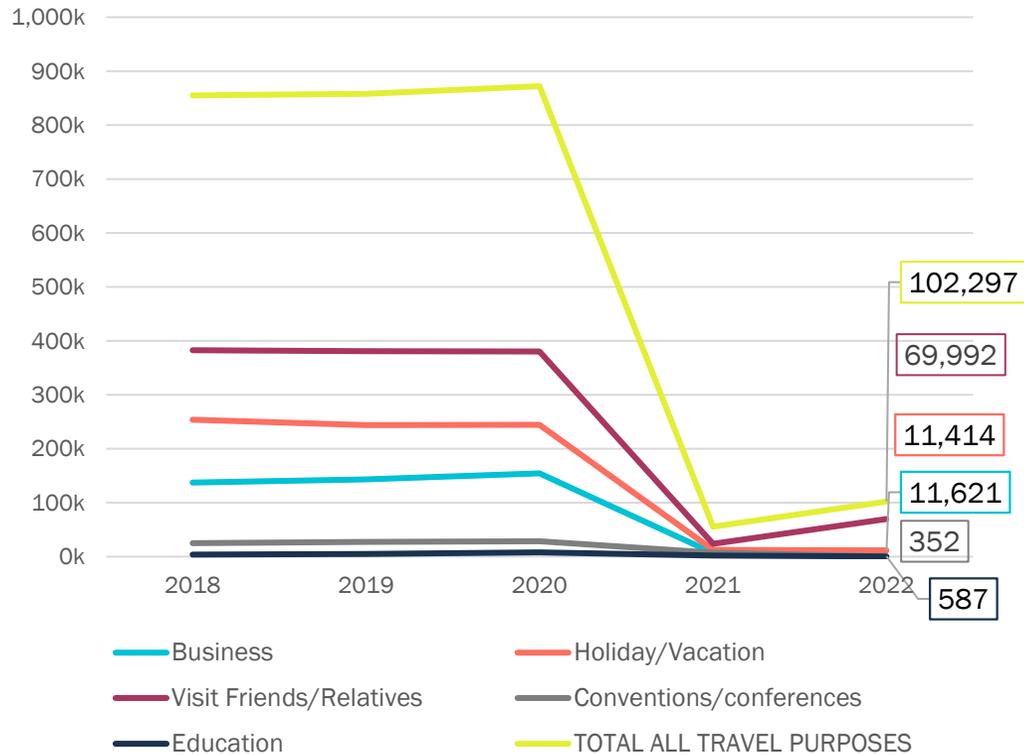
# **Auckland Tourism – Five-year trends in key markets**

# Five-year visitor arrivals to Auckland, YE February

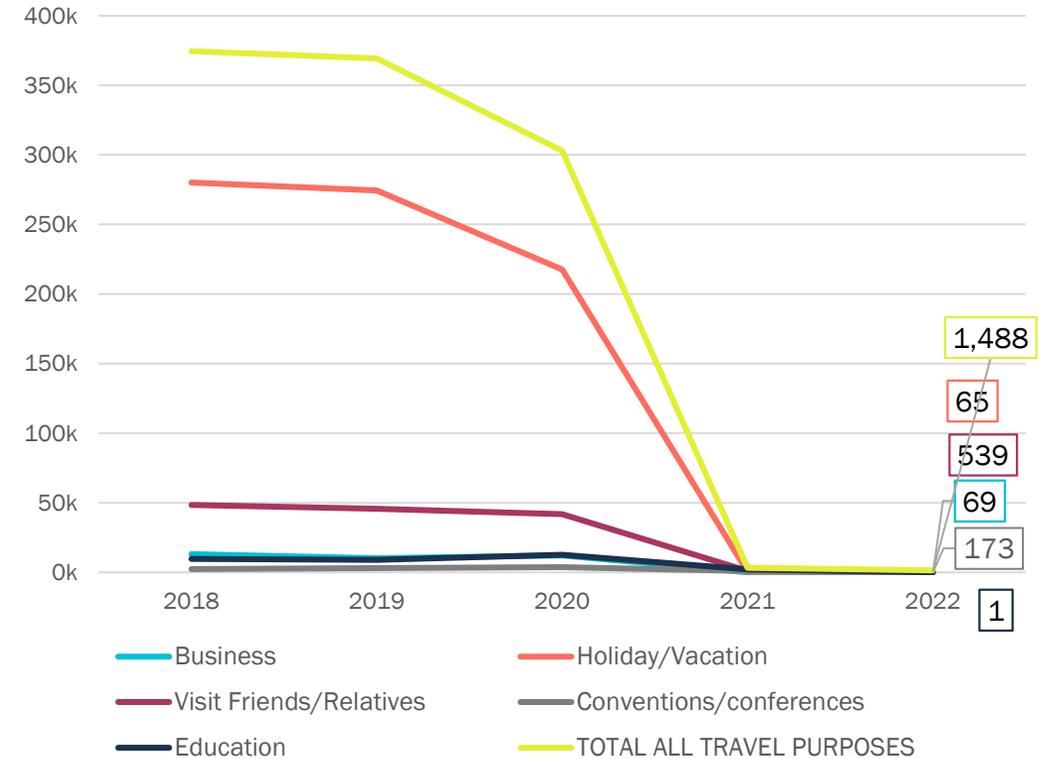


# Five-year visitor arrivals to Auckland, YE February

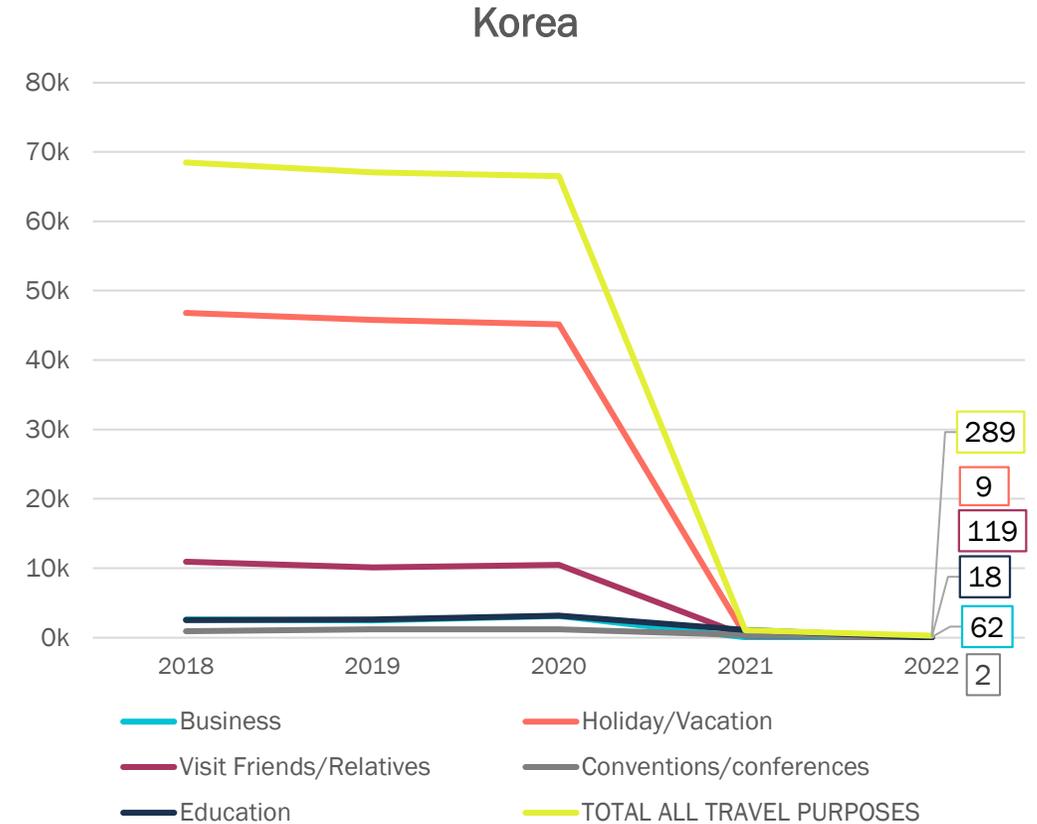
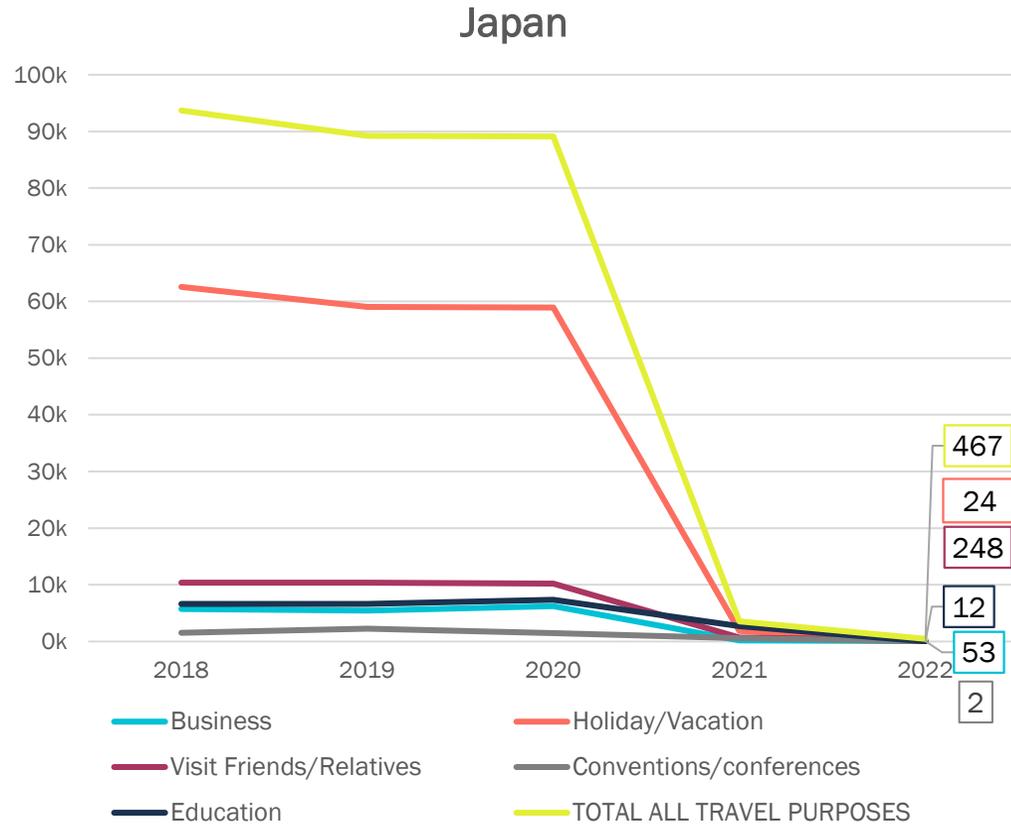
## Australia



## China

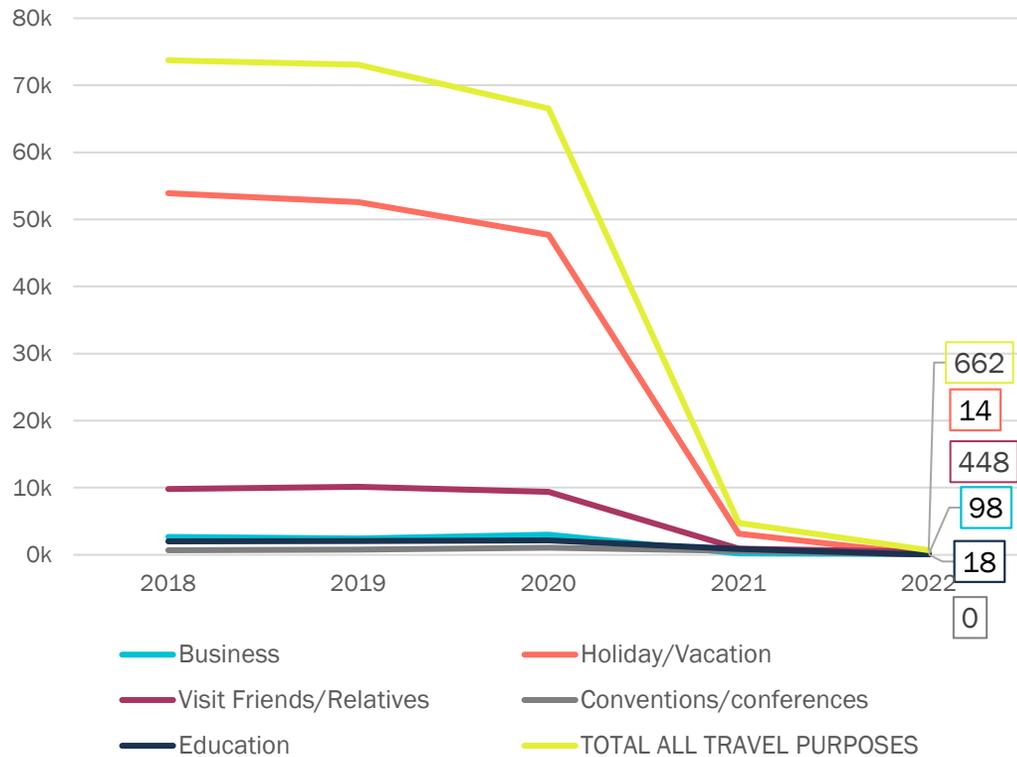


# Five-year visitor arrivals to Auckland, YE February

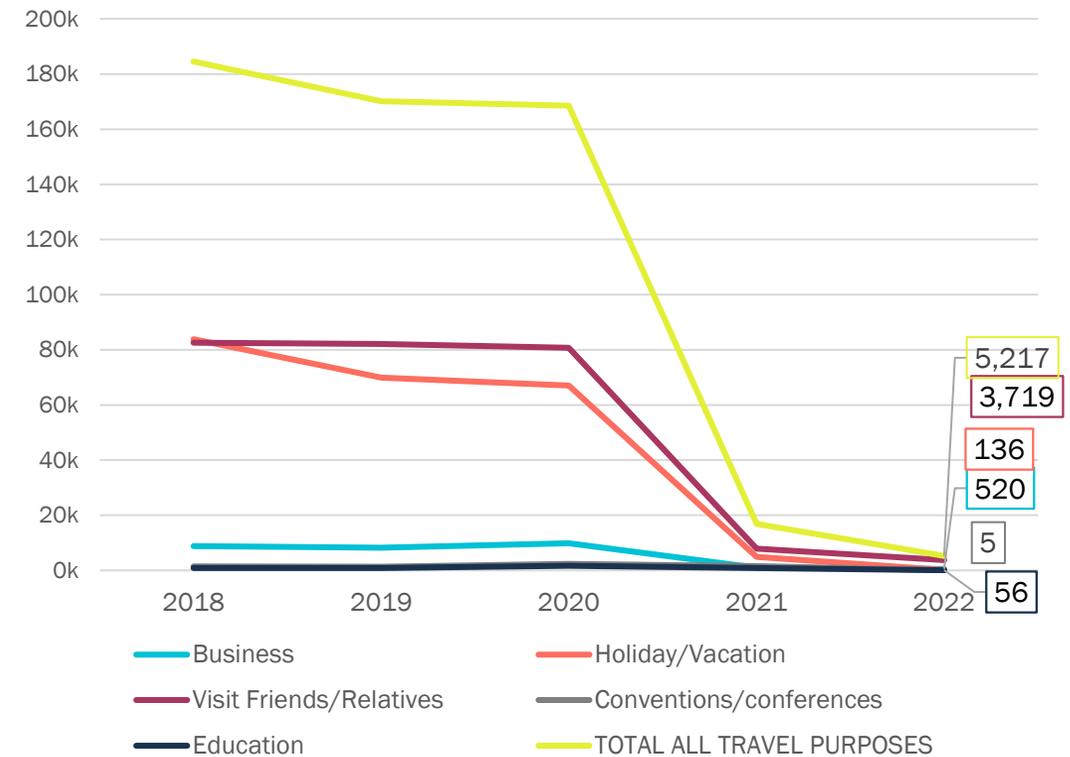


# Five-year visitor arrivals to Auckland, YE February

## Germany

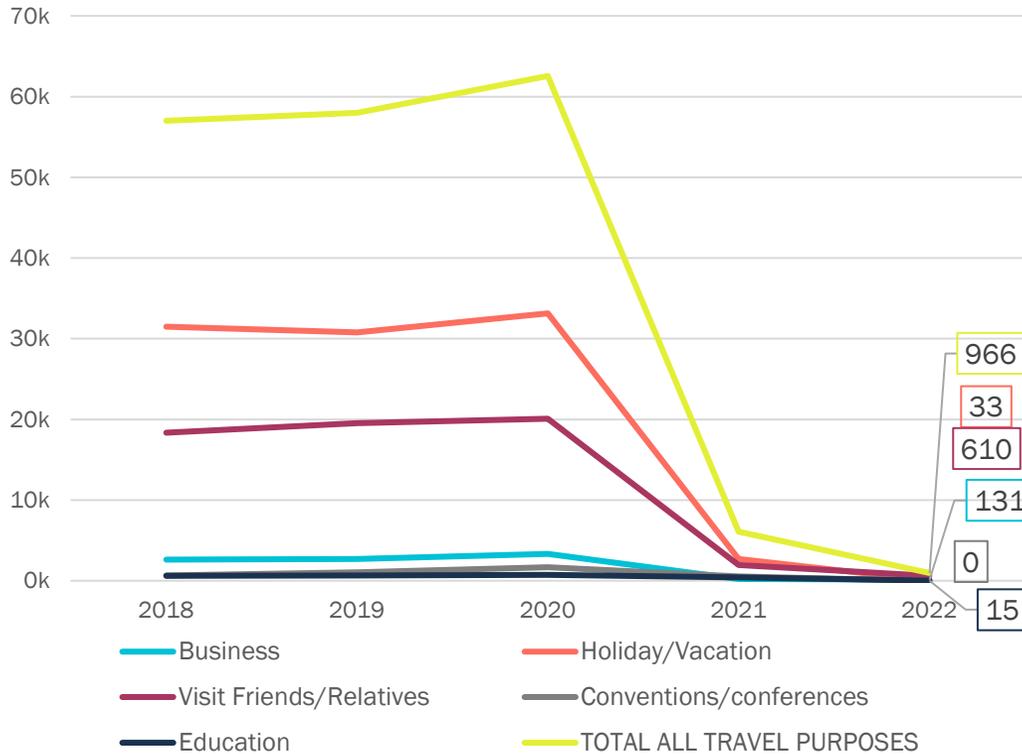


## UK

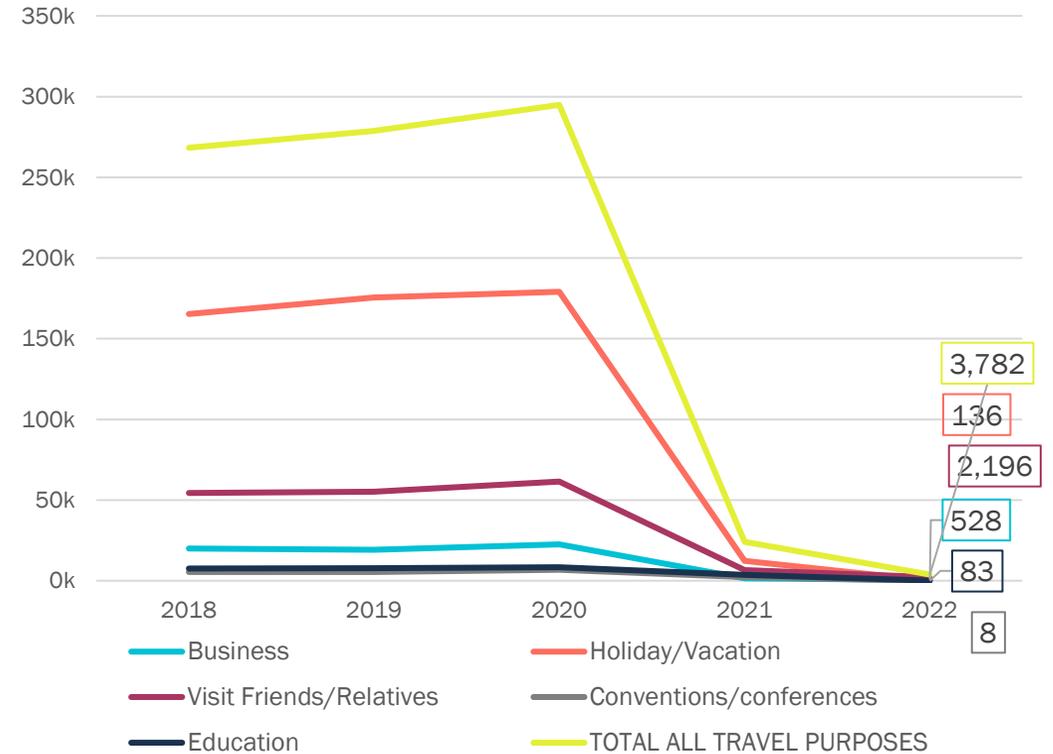


# Five-year visitor arrivals to Auckland, YE February

## Canada



## US



# Ngā mihi Thank you

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- **KEY CONTACT**

**Jaimee Raymond**

Research & Insights Specialist

[jaimee.raymond@aucklandnz.com](mailto:jaimee.raymond@aucklandnz.com)

