

Auckland Domestic Visitor Insights Report

Q3 September 2020

The latest domestic visitor arrival, accommodation and spend data along with insight into domestic visitors' behaviour, experience and perceptions of Auckland.

Prepared November 2020

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KEY FINDINGS



- The domestic market showed a sharp decline since the Covid-19 related lockdowns came into effect.
- There were 4.28m overnight visits by domestic visitors in Auckland in the year to September 2020, down 20.6% on the previous year.
- Visiting friends and relatives (VFR) was the main reason for domestic visitation to Auckland, with 2.39m overnight visits recorded for the year to September 2020 (down 14.0% on the last 12 months).
- Overnight visits for domestic visitors visiting Auckland for holiday purposes were (917.1k overnight visits) down 14.7% on the previous year.
- The highest visitation of all regions to Auckland was from Waikato-based visitors with 700.7k overnight visits (down 23.1% on the previous year). Visits from Bay of Plenty (477.8k visits down 21.7%), Northland (477.6k visits down 21.7%), Wellington (402.8k visits down 24.9%) and Canterbury visitors (198.4k visits down 21.7%) were down compared to last year.
- 277.3k Domestic guest nights in commercial accommodation for the month of September.
- For Q3 2020, domestic visitors stayed an average of 3.7 nights in Auckland. The region with the highest average

length of stay was Central Auckland, with an average of 1.4 nights.

- Domestic spend for the year was \$3.03b, down 19.1% on last year and \$221m for the month of September (down 30.7% compared to September 2019).
- For domestic visitors in Q3 September 2020, the Net Promoter Score (NPS) was +9, which was up (+14) compared to the same quarter last year. This increased to +22 amongst those whose main reason to visit was holiday or short break and remained +9 for those visiting family or friends (although this has increased from -7 in Q3 2019).
- Overall, patterns of accommodation and transport use, visitation to sub-regions and the activities and attractions undertaken in each have held generally steady from Q3 2019 to Q3 2020. This suggests that domestic visitors are experiencing Auckland similarly to the period prior to Covid-19.
- However, some key differences include:
 - 55% of visitors travelled with their partner, husband or wife (up from 46%)
 - 29% of visitors to central Auckland visited Newmarket (up from 18%). Perhaps attributable to the new retail development at Westfield Newmarket.

- For Q3 2020, the highest visitation from domestic visitors was to Central Auckland (79%), followed by North Auckland (48%), South Auckland (47%), West Auckland (39%), East Auckland (37%) and Hauraki Gulf and Islands (19%).
- In the quarter to September 2020, Auckland Zoo received 24% of domestic visitors in the sample for Central Auckland, followed by the Auckland Museum (18%), Auckland Art Gallery (13%), NZ Maritime Museum (10%), MOTAT (8%) and Torpedo Bay Navy Museum (5%) in North Auckland.
- Amongst those whose main reason to visit was VFR:
 - 92% used a private or rented vehicle (up from 85%)
 - 26% of visitors travelled alone (down from 34%)
- Satisfaction with the activities and attractions in each region was high across the board, with all subregions scoring 8 or above on a 10-point scale.
- However, domestic visitors frequently mentioned the need to improve the traffic, roads, public transport, parking and cost in all regions.
- Further, ratings regarding sense of safety, friendliness, and overall experience have all held or shown slight improvement compared to the pre-Covid-19 environment.

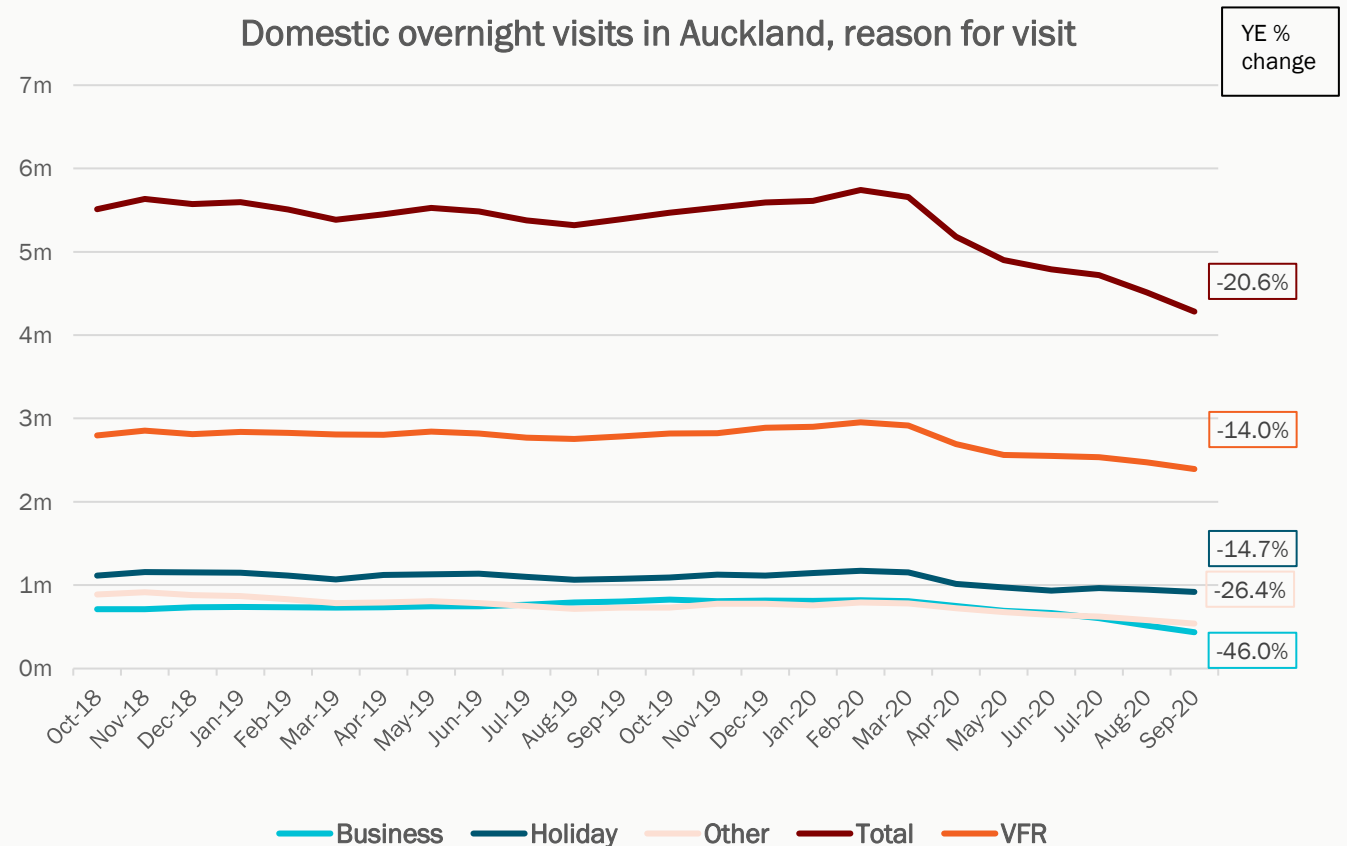


Auckland Tourism – Visitor Arrivals Data

4.28m overnight visits from domestic visitors in the year to September 2020, down 20.6%

- The domestic market has showed a sharp decline since Covid-19 related lockdowns came into effect (in April 2020).
- The year to September 2020 saw **4.28m** overnight visits from domestic visitors, a decrease of 20.6% on the previous year.
- Visiting friends and relatives (VFR) was the main reason for domestic visitation to Auckland, with 2.39m overnight visits recorded for the year to September 2020 (down 14.0% on the previous 12 months).
- Overnight visits for domestic visitors visiting Auckland for holiday purposes were (917.1k overnight visits) down 14.7% on the previous September.

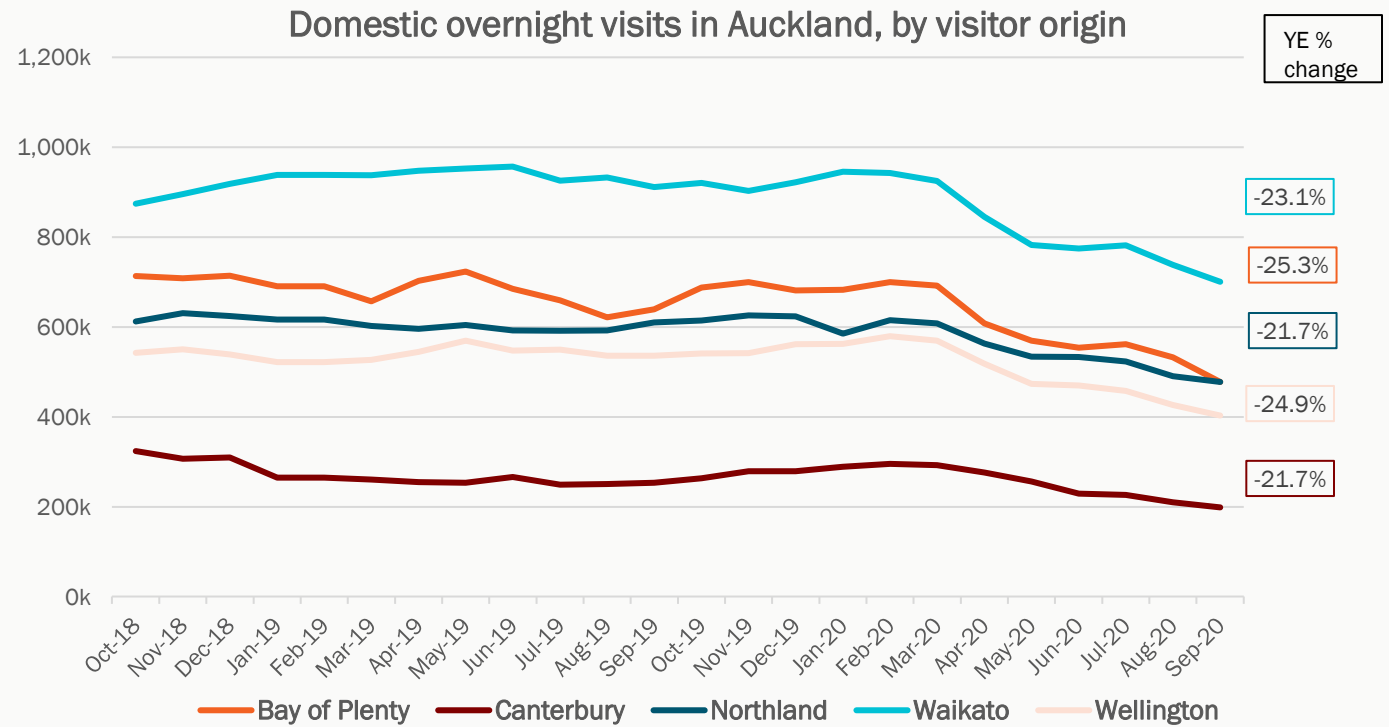
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	Visitor arrivals	vs. previous year / YE
YE September 2020	4,281,948	-20.6%

Waikato visitors to Auckland were down 23.1% in the year to September 2020

- Of Auckland’s domestic visitor drive markets, visitation from Waikato was highest for the year ending September 2020, with 700.7k overnight visits (down 23.1% on the previous year).
- The other two drive markets were also down: Bay of Plenty (477.6k visits down 25.3%), Northland (477.6k visits down 21.7%).
- In our main domestic fly markets, Wellington (402.8k visits down 24.9%) and Canterbury (198.4k visits down 21.7%) were down for the year to September 2020 compared to last year.



	Waikato	vs. previous year	Northland	vs. previous year	Bay of Plenty	vs. previous year	Wellington	vs. previous year	Canterbury	vs. previous year
YE September 2020	700,731	-23.1%	477,649	-21.7%	477,782	-25.3%	402,769	-24.9%	198,393	-21.7%



Auckland Visitor Survey – Accommodation Data

277.3k domestic guest nights in September

- The Accommodation Data Programme (ADP) is a new 'by industry, for industry' research programme designed to meet the needs of accommodation providers and industry representatives in NZ. It replaces Stats NZ's Accommodation Survey (CAM) which ceased in September 2019. Reported statistics are based on information provided by commercial accommodation providers.
- For the month of September 2020, there were **318.7k total guest nights** in **commercial accommodation in Auckland** (although not exactly comparable to the CAM due to methodological differences, this indicates a drop of approximately 48.5% on the previous September CAM data).
- There were **41.5k International guest nights** in commercial accommodation (down approx. 83.5%) and **277.3k domestic guest nights** (down approx. 24.4%) for the month of September 2020, both of which were down when compared to the 2019 CAM data.

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Measure	Auckland	New Zealand
Total guest nights	318,700	2,214,000
Domestic guest nights	277,300	2,046,000
International guest nights	41,500	168,100

Domestic visitors stayed 3.7 average nights in Auckland

- For the quarter to September 2020, domestic visitors stayed an average of 3.7 nights in Auckland.
- The region with the highest average length of stay was Central Auckland, with an average of 1.4 nights.
- Domestic visitors stayed an average of 0.7 nights in North Auckland, followed by 0.6 nights in South Auckland, 0.4 nights in both East and West Auckland, and 0.2 nights in Hauraki Gulf and Islands.
- Last year during the same quarter, domestic visitors stayed in Auckland 4.6 nights on average, with 2.3 nights in Central Auckland.

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Accommodation Type & Satisfaction

Domestic visitors

- In the quarter to September 2020, just over half of domestic visitors (52%) to Auckland stayed in commercial accommodation in Central Auckland, while almost half (48%) stayed in other types of accommodation such as private homes and Airbnb, etc.*
- Similarly, of the domestic visitors that visited the Hauraki Gulf and Islands, 60% of visitors stayed in commercial accommodation in comparison to other accommodation (40%).
- In contrast, most domestic visitors stayed in other types of accommodation in West (73%), South (66%) and North (61%) Auckland.
- Overall, domestic visitors were most satisfied with the quality of their accommodation rating it 7.6 out of 10. The value of their accommodation and level of customer service was also well rated (7.3 and 7.7 out of 10 respectively). Ratings are similar to last year.





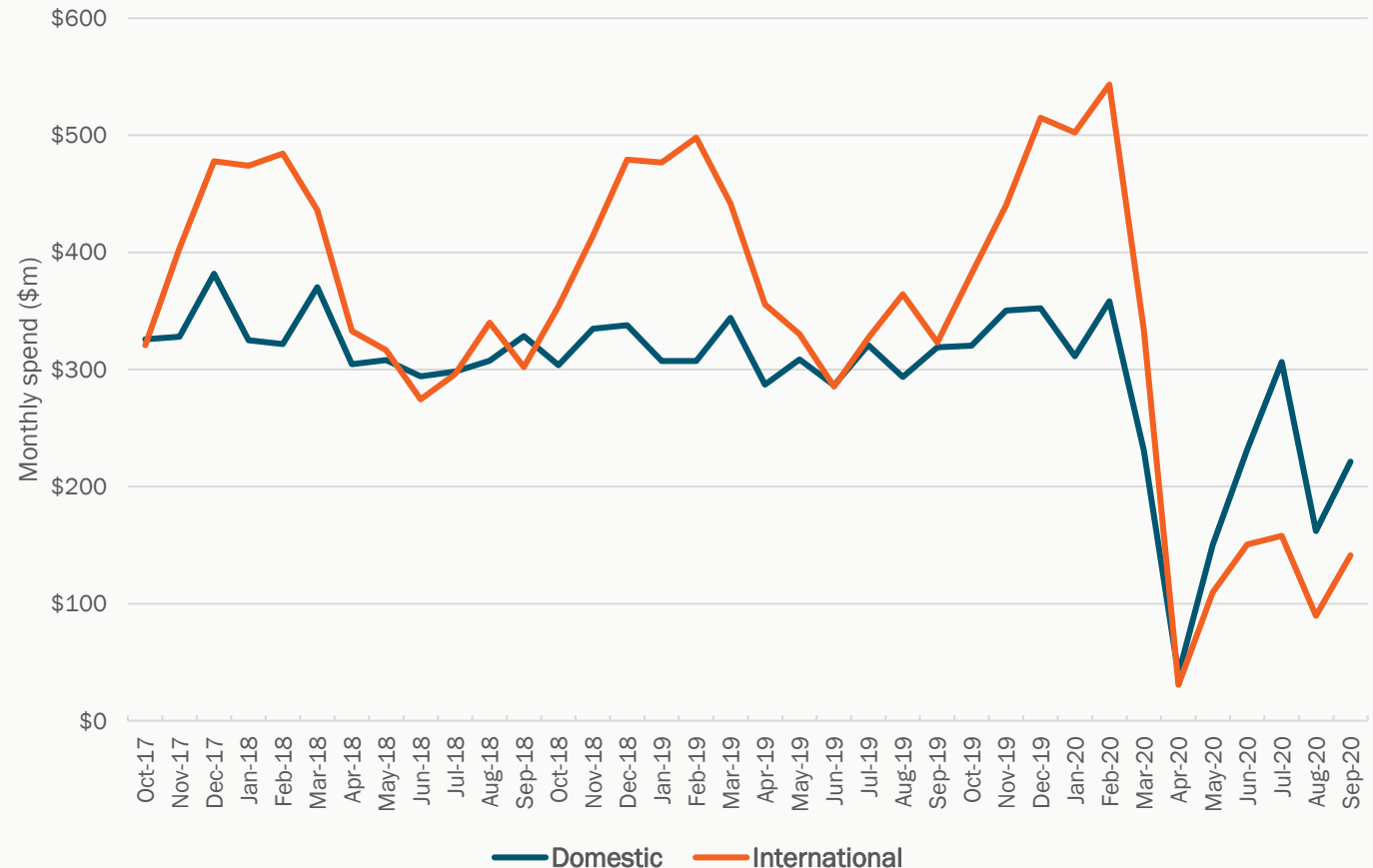
Auckland Tourism – Spend Data

Tourism spend in the year to September 2020 was \$6.43b, down 23.5%

- Due to the travel restrictions and Level 4 lockdown in March 2020, the sharp drop in tourism expenditure (from February) had since rebounded in April. However, tourism spend dropped for a second time during Auckland’s second lockdown in August but rebounded again in September.
- In the year to September 2020, total tourism spend in Auckland was \$6.43b, down 23.5% on last year.
- International spend was \$3.40b, down 27.0% for the year.
- Domestic spend was \$3.03b and had decreased by 19.1%.
- The month of September saw decreases in international (down 56.3%) and domestic spend (down 30.7%).

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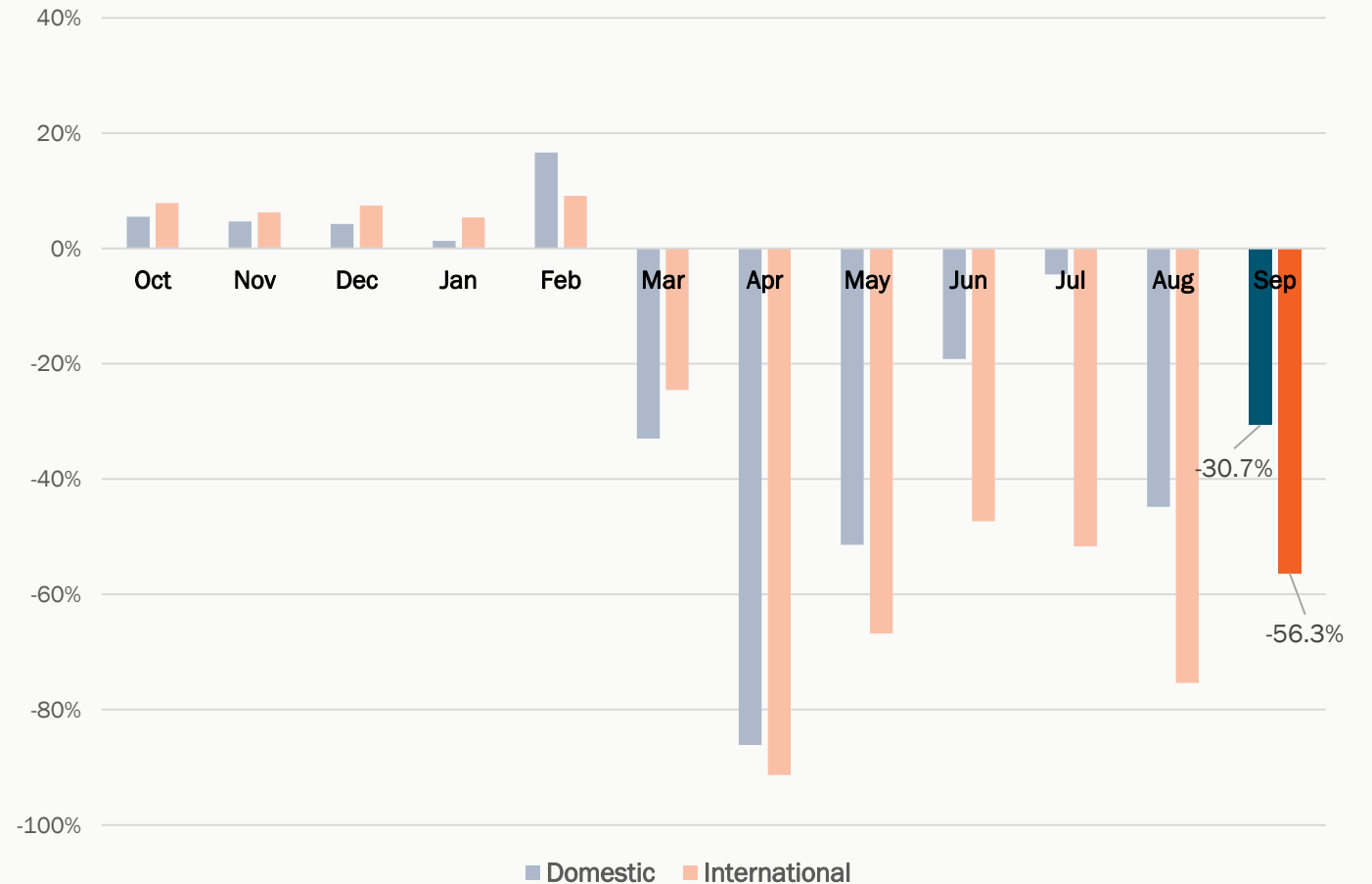
Year end tourism expenditure in Auckland



Total monthly tourism spend for September (\$363m) was down 43.5%

- International spend in September 2020 decreased by 56.3% (to \$141m) compared with the same month in 2019.
- Domestic spend was \$221m for the month, down 30.7% on September 2019.
- Overall, this resulted in a 43.5% decrease in total tourism spend (\$363m) in Auckland for September 2020 compared with the previous year.

Monthly % Change in tourism expenditure in Auckland

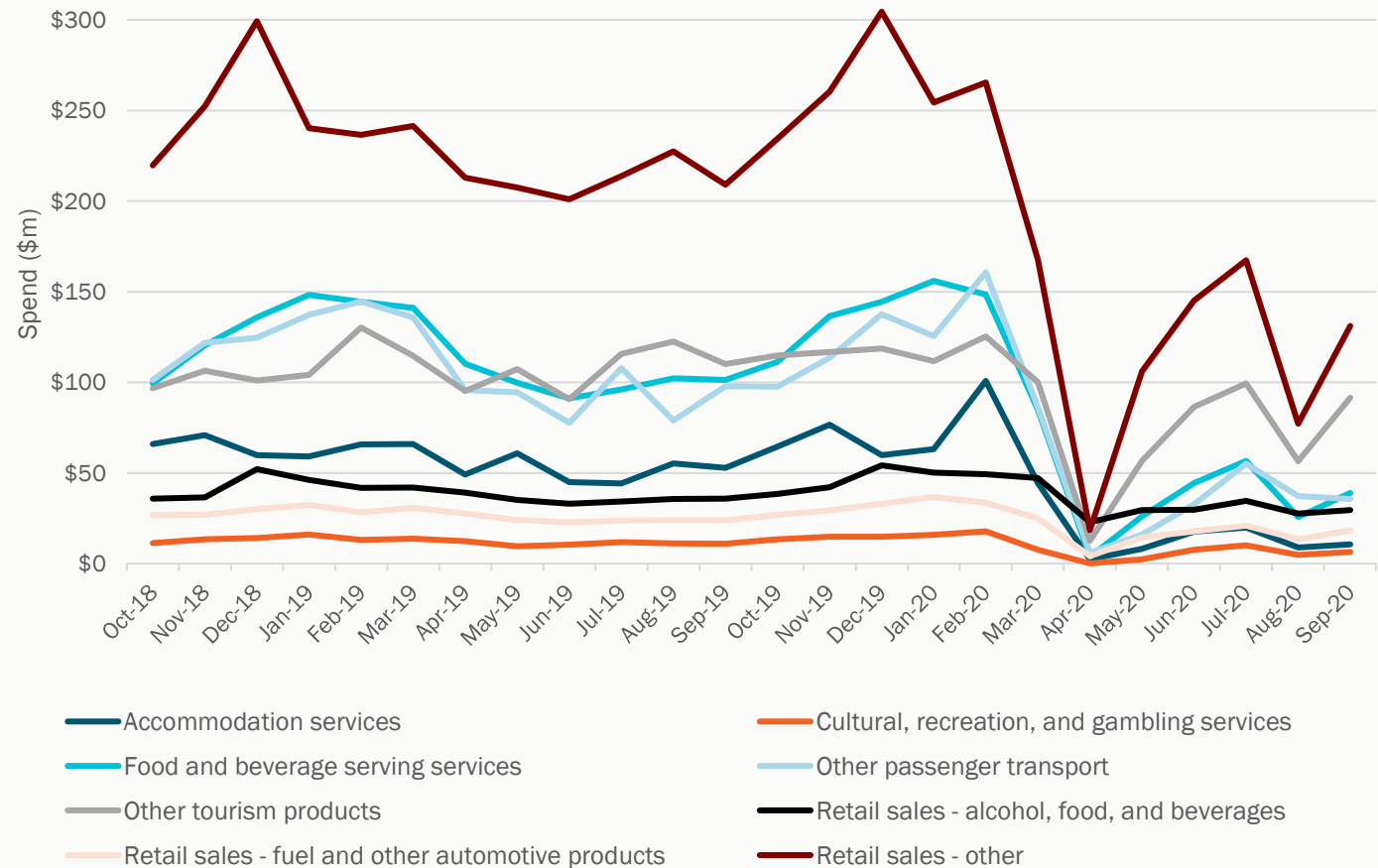


International and domestic tourism spend by product for September 2020

	Spend (\$m)	% change
Accommodation services	10.6	-80.0%
Cultural, recreation, and gambling services	6.5	-41.0%
Food and beverage serving services	39.0	-61.6%
Other passenger transport	35.7	-63.5%
Other tourism products	91.6	-16.8%
Retail sales - alcohol, food, and beverages	29.6	-17.2%
Retail sales - fuel and other automotive products	18.5	-23.1%
Retail sales - other	131.1	-37.3%

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International and domestic monthly tourism expenditure in Auckland, by product





Auckland Visitor Survey – Travel Behaviour Data

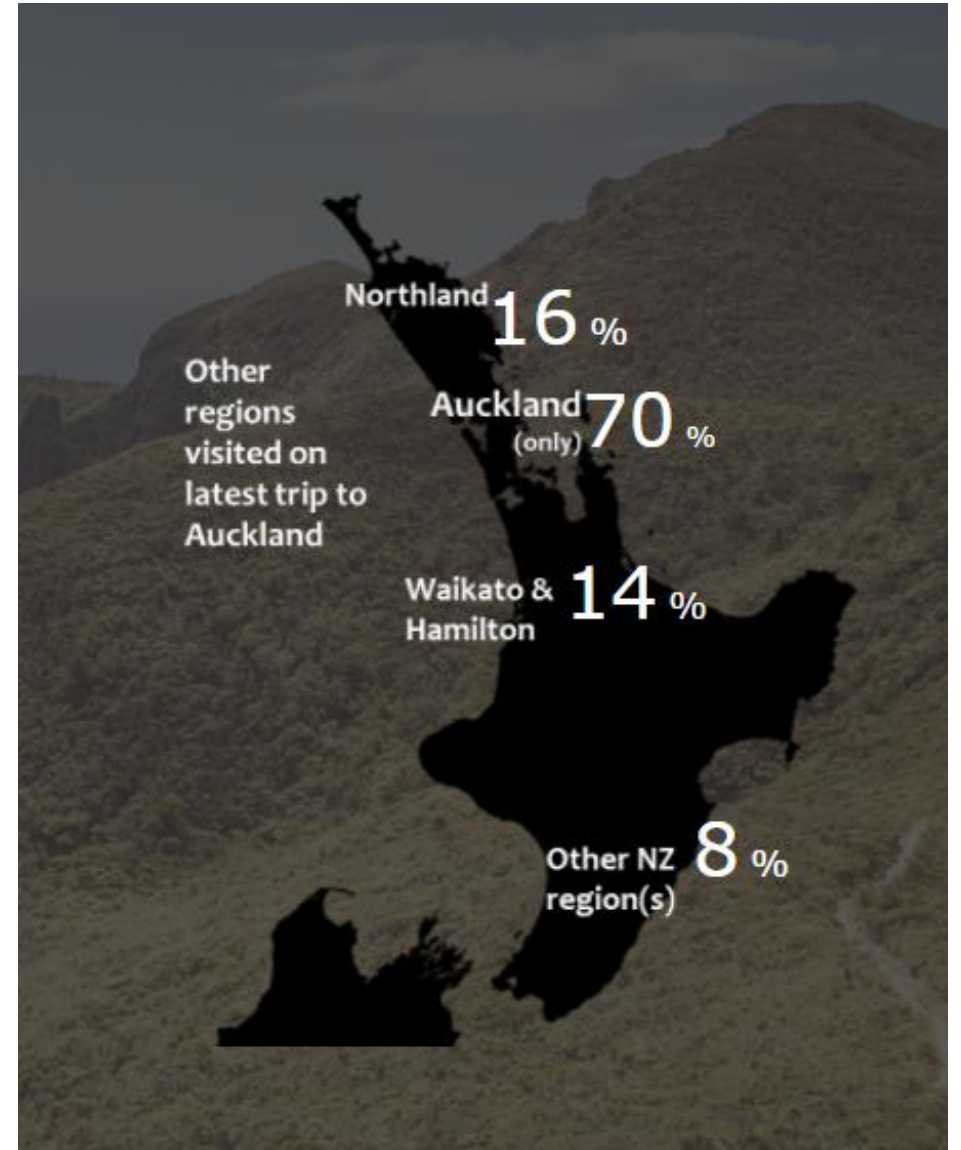
Travel behaviour Q3 2020

- For the quarter to September 2020, the majority (70%) of domestic visitors visited Auckland only on their trip.
- 16% visited Northland, while 14% went to Waikato/Hamilton and only 8% visited other New Zealand regions during the same trip.
- 46% stayed in Auckland only on their trip, while 55% stayed in Auckland two (31%) or more (24%) times on their trip.
- Results are on par with domestic travel behaviour during the same time last year (pre Covid-19). However, differences were:
 - 55% of visitors travelled with their partner, husband or wife (up from 46% last year).
 - 26% of VFR visitors travelled alone (down from 34% last year).

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No. of stays in Auckland on trip	%
0 (Day trip)	0%
1	46%
2	31%
3+	24%

n= 430





Auckland Visitor Survey – Transport Data

Transport Domestic visitors

- For the quarter to September 2020, the main mode of transport for domestic visitors was a private or rented vehicle (81%), followed by public bus or train (15%).
- 92% of VFR domestic visitors used a private or rented vehicle (up from 85% last year).
- Domestic visitors were most satisfied with the ease of walking around (7.1 out of 10) and the Auckland Airport passenger terminal (7.0), followed by the ease of wayfinding (6.8).
- Ease of; parking (5.4), driving around (5.7) and cycling around (5.8) were the lowest rated transport aspects.
- Results are similar to the same quarter last year (pre Covid-19).

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n= 430



Auckland Visitor Survey – Attractions & Activities Data



Satisfaction with Attractions & Activities



8.2 / 10

CENTRAL AUCKLAND
Average Satisfaction with
Activities & Attractions
Q3 September 2020



8.4 / 10

NORTH AUCKLAND
Average Satisfaction with
Activities & Attractions
Q3 September 2020



8.2 / 10

EAST AUCKLAND
Average Satisfaction with
Activities & Attractions
Q3 September 2020



8.0 / 10

SOUTH AUCKLAND
Average Satisfaction with
Activities & Attractions
Q3 September 2020



8.3 / 10

WEST AUCKLAND
Average Satisfaction with
Activities & Attractions
Q3 September 2020



8.2 / 10

HAURAKI GULF & ISLANDS
Average Satisfaction with
Activities & Attractions
Q3 September 2020



Attractions & Activities Central Auckland



79%

of visitors to the Auckland region visited or thought they visited Central Auckland

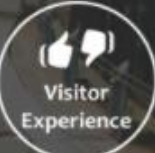
8.2

Average Satisfaction with Attractions and Activities (out of 10)

Areas & Attractions Visited

Activities Done

Break down of Māori Cultural Activity or Experiences done



Filter results by:

YE SEP 19

Q3 2019

YE DEC 19

Q4 2019

YE MAR 20

Q1 2020

Q3 2020

REASON FOR VISIT

Visitors on holiday

Visit friends & family

ORIGIN

Domestic Visitors

International Visitors

What, if anything, could have improved your experience of Central Auckland?
(Comments from Q3 2020 respondents - DOMESTIC only)

LESS CONSTRUCTION SITES & ROAD WORKS

LESS HOMELESS PEOPLE

VALUE FOR MONEY

PARKING

CLEANER SPACES & RUBBISH

REDUCE TRAFFIC

WAYFINDING

PUBLIC TRANSPORT

TODAY MANY PEOPLE

PEDESTRIAN ACCESS & SAFETY

"There is so much construction happening around the city. When you are not from Auckland, or unfamiliar with the city centre, it is difficult to get your bearings when there are footpath and road closures"

"To push for the underground train system. Other major cities have this and would benefit future generations"

"Closer park and ride locations (for example from Onehunga to city)"

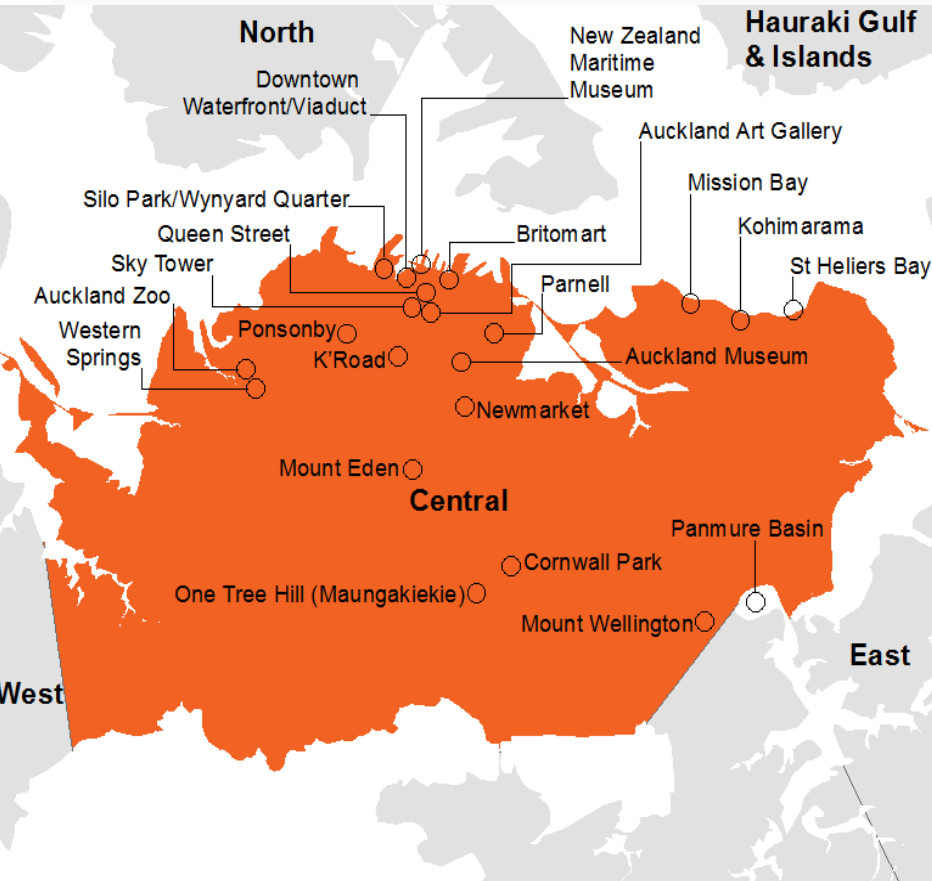
"Better public information on transport. hard to understand if you are not a local"

"Streets could be cleaner, and certain parts of Queen Street could be refurbished and cleaned up"



Top 10 Attractions - Q3 2020

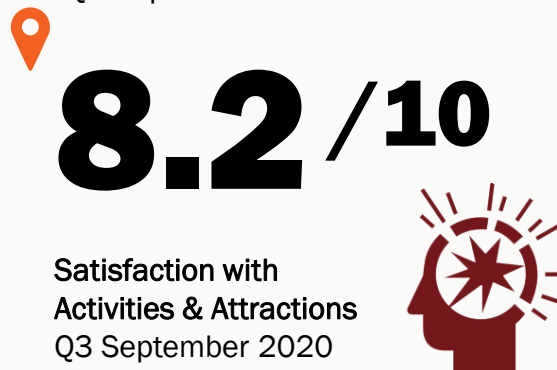
Central Auckland



- The majority of domestic visitors to Auckland (79%) visited Central Auckland in the quarter to September 2020. The average satisfaction with Central Auckland’s activities and attractions was 8.2 out of 10. These results are the same as last year.
- 38% of visitors went to Queen Street, 37% visited the Sky Tower and 30% the downtown waterfront and viaduct.
- 29% of visitors to Central Auckland visited Newmarket (up from 18% last year). Perhaps attributable to the new retail development at Westfield Newmarket.



Market share of international visitors in Auckland
Q3 September 2020



Satisfaction with Activities & Attractions
Q3 September 2020

Rank	Attraction	%
1	Queen Street	38%
2	Sky Tower	37%
3	Downtown Waterfront/ Viaduct	30%
4	Newmarket	29%
5	Sky City Casino	27%
6	Auckland Zoo	24%
7	Britomart	23%
8	Mission Bay	20%
9	Auckland Museum	18%
10	Mt Eden	18%

Top 10 Activities Central Auckland

- Of the domestic visitors that visited Central Auckland in the quarter to September 2020, the most popular activities were visiting a restaurant or café (55%) followed by shopping (52%), visiting the beach (30%), going to a bar, pub or nightclub (29%) and general exploration (28%).
- In comparison to the same quarter last year, last year domestic visitors went to an event, concert or festival (15%) while this quarter visitors went walking, hiking, climbing, trekking and tramping (16%).

DOMESTIC

#	Activity	%
	1 Restaurant or café	55%
	2 Shopping	52%
	3 Went to the beach	30%
	4 Bar, pub or nightclub	29%
	5 General exploration	28%
	6 Visited a market	26%
	7 Sightseeing	21%
	8 Casino or gambling	20%
	9 Visited art galleries, museums, historic sites	19%
	10 Walking, hiking, climbing, trekking, tramping	16%

Māori Cultural Attractions Central Auckland

- Of the survey respondents who partook in Māori cultural activities or experiences in the quarter to September 2020, two thirds (67%) experienced artefacts, art or crafts. This was double the amount or participants from last year (33%).
- This year 61% visited a marae and 56% saw a live performance. These results are the same as Q3 2019.
- 50% of the visitors ate traditional food, while 44% experienced a guided tour and 11% participated in another Māori cultural activity.

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Rank	Activity	Q3 2019	Q3 2020
1	Experienced artefacts, art or crafts	33%	67%
2	Visited a marae	61%	61%
3	Saw a live performance	56%	56%
4	Ate traditional food	67%	50%
5	Experienced a guided tour	22%	44%
6	Another Māori cultural activity	22%	11%
	n=	18	18



Key Attractions Auckland

- In the quarter to September 2020, Auckland Zoo received 24% of domestic visitors in the sample for Central Auckland, followed by the Auckland Museum (18%), Auckland Art Gallery (13%), NZ Maritime Museum (10%), MOTAT (8%) and Torpedo Bay Navy Museum (5%) in North Auckland.

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#	Attraction	Q3 2019	Q3 2020	% change
1	Auckland Zoo	27%	24%	-3%
2	Auckland Museum	18%	18%	--
3	Auckland Art Gallery	10%	13%	+3%
4	NZ Maritime Museum	7%	10%	+3%
5	MOTAT	6%	8%	+2%
6	Torpedo Bay Navy Museum	0%	5%	+5%

Central Auckland Q3 2019 n = 324
 Central Auckland Q3 2020 n = 341
 North Auckland Q3 2019 n = 173
 North Auckland Q3 2020 n = 205

Attractions & Activities North Auckland



Filter results by:

YE SEP 19 Q3 2019

YE DEC 19 Q4 2019

YE MAR 20 Q1 2020

Q3 2020

REASON FOR VISIT

Visitors on holiday

Visit friends & family

ORIGIN

Domestic Visitors

International Visitors

What, if anything, could have improved your experience of North Auckland?
(Comments from Q3 2020 respondents - DOMESTIC only)

VALUE FOR MONEY SERVICE LEVELS TOO MANY PEOPLE PARKING

REDUCE TRAFFIC

IMPROVE ROADING BETTER PUBLIC TRANSPORT

- "Prices could be cheaper and more discounts/promotions available"
- "Could have better and more transport at better times of the day, more frequent times"
- "Traffic trying to get there. I must be unlucky but ended up gridlocked on the bridge"
- "Better roading on Whangaparaoa road"
- "Gravel roads were in bad condition"




Note: When applying date filters please be aware that data from international visitors is available until Q1 2020 only. No data collection occurred in Q2 2020. From Q3 2020 onwards data is from domestic visitors only.

Top 10 Attractions – Q3 2020

North Auckland



n = 205

- In the quarter ending September 2020, almost half of domestic visitors (48%) visited North Auckland. The average satisfaction with the activities and attractions in North Auckland was 8.4 out of 10. These results are similar to Q3 2019.
- The top attractions for domestic visitors who visited North Auckland were Takapuna (27%), and Devonport (27%) followed by Albany (24%). In comparison to the same quarter last year, last year domestic visitors visited Pūhoi (12%) and Whangaparaoa Peninsula (13%) while this year they went Snow Planet (13%) and Matakana (11%).



48%



Market share of international visitors in Auckland
Q3 September 2020



8.4 / 10

Satisfaction with Activities & Attractions
Q3 September 2020



Rank	Attraction	%
1	Takapuna	27%
2	Devonport	27%
3	Albany	24%
4	Warkworth	19%
5	Orewa	18%
6	Wellsford	17%
7	Silverdale	16%
8	Snow Planet	13%
9	Matakana	11%
10	Mt Victoria	11%

Note: Q3 2020 findings are based on domestic visitors only and are compared to Q3 2019 domestic visitor results.

Top 10 Activities North Auckland

- Of the domestic visitors that visited North Auckland in the quarter to September 2020, the most popular activities were visiting a restaurant or café (38%) followed by going to the beach (33%), shopping (28%), general exploration (24%) and visiting a market (24%).
- In comparison to the same quarter last year, last year domestic visitors visited art galleries, museums and historic sites (10%) and went hunting and fishing (7%), while this quarter visitors went to an event, concert or festival (10%) and partook in other water activities (9%).

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n = 205

DOMESTIC

#	Activity	%
	1 Restaurant or café	38%
	2 Went to the beach	33%
	3 Shopping	28%
	4 General exploration	24%
	5 Visited a market	24%
	6 Walking, hiking, climbing, trekking, tramping	20%
	7 Bar, pub or nightclub	18%
	8 Sightseeing	17%
	9 Event, concert or festival	10%
	10 Other water activities	9%

Attractions & Activities East Auckland



37%

of visitors to the Auckland region visited or thought they visited East Auckland

8.2

Average Satisfaction with Attractions and Activities (out of 10)

Areas & Attractions Visited

Activities Done

Break down of Māori Cultural Activity or Experiences done

Home

Explore

Visitor Experience

Filter results by:

- YE SEP 19
- YE DEC 19
- YE MAR 20
- Q3 2019
- Q4 2019
- Q1 2020
- Q3 2020

REASON FOR VISIT

Visitors on holiday

Visit friends & family



Domestic Visitors



International Visitors



What, if anything, could have improved your experience of East Auckland?

(Comments from Q3 2020 respondents - DOMESTIC only)

PARKING
MORE SHOPS
ROADING
VALUE FOR MONEY
TRAFFIC

"It was a great experience but need more cops around the area during the night for security"

"Better/up to date GPS files to reflect recent roading developments"

"Improve the roading to reach Beachlands area"

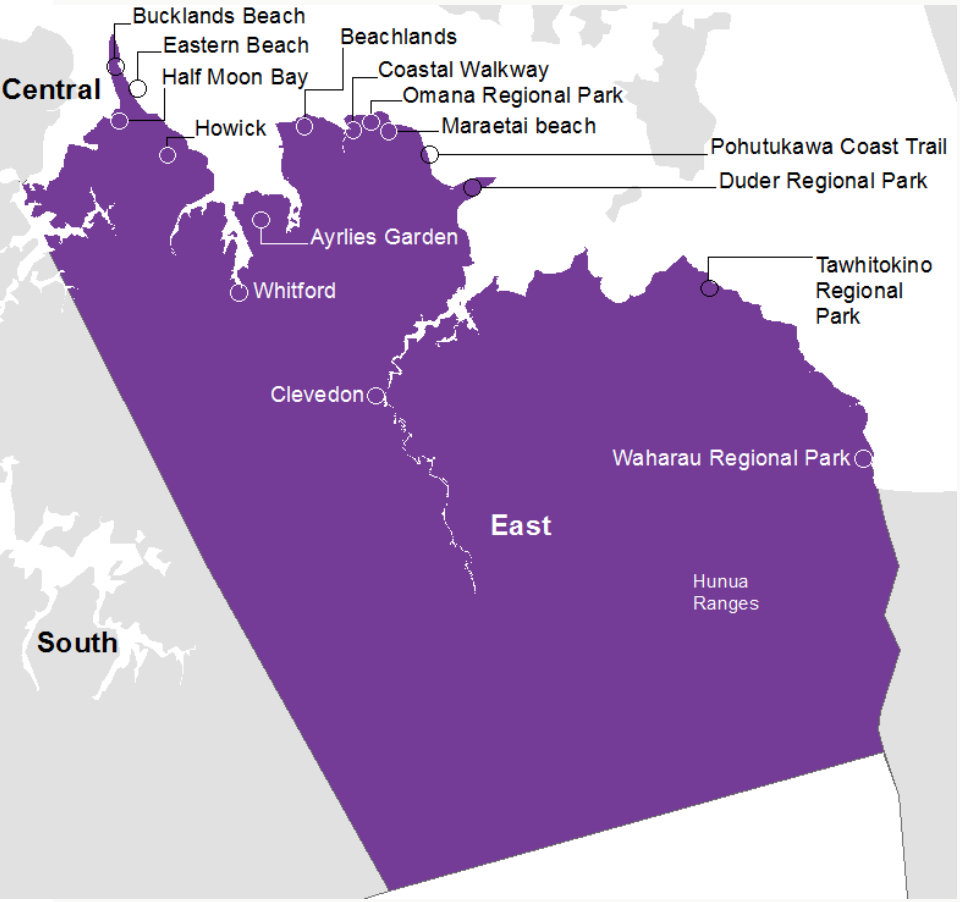
"Cheap motels are hard to find. All are very expensive."



Note: When applying date filters please be aware that data from international visitors is available until Q1 2020 only. No data collection occurred in Q2 2020. From Q3 2020 onwards data is from domestic visitors only.

Top 10 Attractions - Q3 2020

East Auckland



- In Quarter three of 2020, 37% of domestic visitors to Auckland visited East Auckland. The average satisfaction with East Auckland’s activities and attractions was 8.2 out of 10. These results are similar to the same quarter last year.
- Sylvia Park was the most visited attraction (31%) while 19% visited Bucklands Beach and 18% visited Half Moon Bay. In comparison to the same quarter last year, this year visitors went to the Clevedon Village Farmers Market (12%) and Howick Historical Village (11%) while last year visitors visited Clevedon (9%) and the Pakuranga Night Markets (9%).



Market share of domestic visitors in Auckland
Q3 September 2020



Satisfaction with Activities & Attractions
Q3 September 2020

Rank	Attraction	%
1	Sylvia Park	31%
2	Bucklands Beach	19%
3	Half Moon Bay	18%
4	Beachlands	15%
5	Howick	14%
6	Clevedon Village Farmers Market	12%
7	Howick Historical Village	11%
8	Eastern Beach	11%
9	Whitford	11%
10	Coastal Walkway	10%

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n = 157

Note: Q3 2020 findings are based on domestic visitors only and are compared to Q3 2019 domestic visitor results.











Top 10 Activities East Auckland

- Of the domestic visitors that visited East Auckland in the quarter to September 2020, the most popular activities were shopping (27%) followed by visiting a restaurant or café (25%), the beach (20%), a market (19%) and general exploration (19%).
- In comparison to the same quarter last year, last year domestic visitors went hunting and fishing (6%) in East Auckland, while this quarter visitors had a wellness experience (9%).
- 12% of VFR visitors to East Auckland participated in a bird or wildlife experience (up from 4% last year).

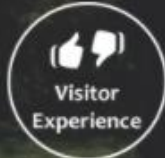
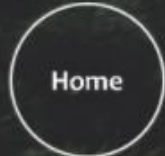
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n = 162

DOMESTIC

#	Activity	%
	1 Shopping	27%
	2 Restaurant or café	25%
	3 Went to the beach	20%
	4 Visited a market	19%
	5 General exploration	19%
	6 Sightseeing	14%
	7 Bar, pub or nightclub	13%
	8 Walking, hiking, climbing, trekking, tramping	11%
	9 Cruising, boating or sailing	9%
	10 Wellness experiences	9%

Attractions & Activities South Auckland



Filter results by:

YE SEP 19 Q3 2019
YE DEC 19 Q4 2019
YE MAR 20 Q1 2020
Q3 2020

REASON FOR VISIT

Visitors on holiday
Visit friends & family

ORIGIN

Domestic Visitors

International Visitors

What, if anything, could have improved your experience of South Auckland?
(Comments from Q3 2020 respondents - DOMESTIC only)

CLEANER SPACES & RUBBISH
WAYFINDING
TRAFFIC
MORE ATTRACTIONS & STORES
VALUE FOR MONEY
ROADING
PUBLIC TRANSPORT PARKING

"A train service from the airport to central Auckland"

"Directions, particularly when roads are closed due to roadworks...for out of towners need more advanced warning, and larger re-route signs...difficult at night time and wet weather, and insufficient notification to enable earlier lane changes"

"The motorway congestion around the Takanini Roadworks area has been a real problem for several years now. Admittedly it has nearly finished but it has made getting into Auckland extremely time consuming and problematic."

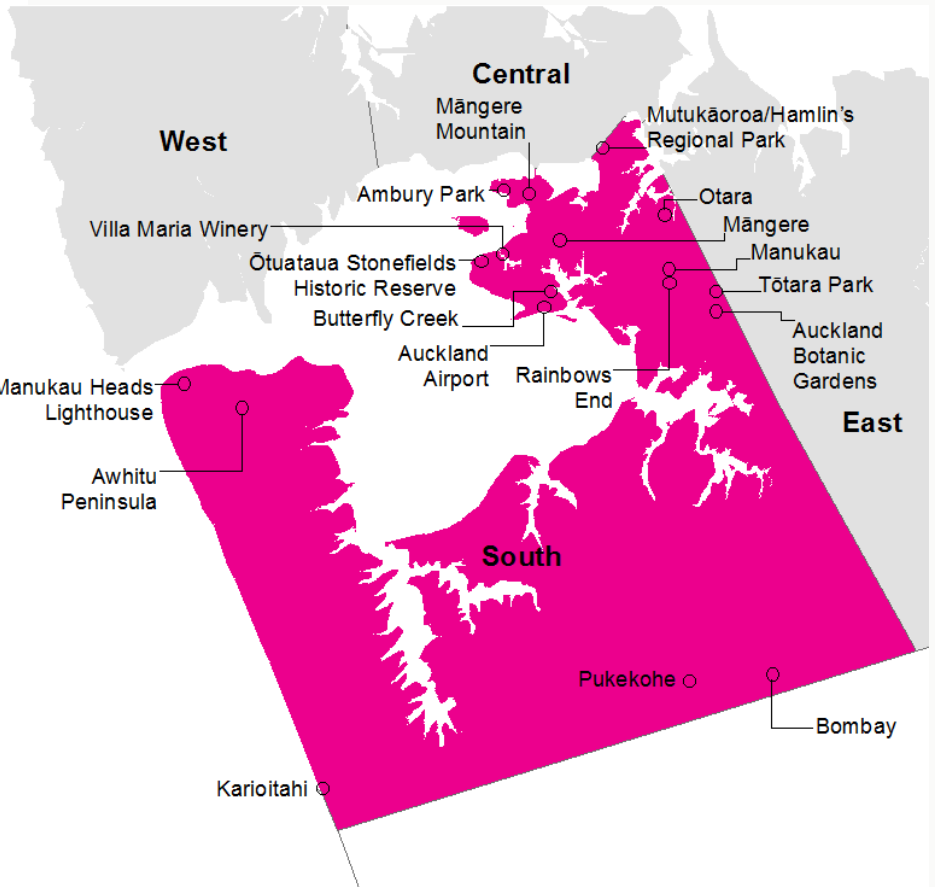
"Have more tour guides that provide a food tour rather than scenic tour around Auckland"



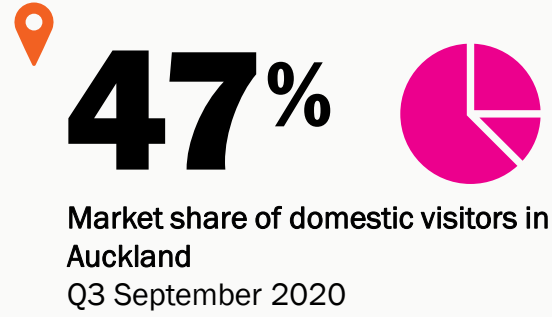

Note: When applying date filters please be aware that data from international visitors is available until Q1 2020 only. No data collection occurred in Q2 2020. From Q3 2020 onwards data is from domestic visitors only.

Top 10 Attractions – Q3 2020

South Auckland



- In the quarter to September 2020, almost half of all domestic visitors (47%) to Auckland visited South Auckland. The average satisfaction with South Auckland’s activities and attractions was 8.0 out of 10. In the same quarter last year, 50% of domestic visitors went to South of Auckland and satisfaction was 7.8/10.
- The top attractions in South Auckland were the Auckland Airport (38%), Manukau (26%) and Rainbows End (22%).
- 20% of holiday visitors to South Auckland visited Pukekohe/Bombay (up from 6% last year).



Rank	Attraction	%
1	Auckland Airport	38%
2	Manukau	26%
3	Rainbows End	22%
4	Pukekohe/Bombay	17%
5	Butterfly Creek	15%
6	Botanic Gardens	14%
7	Otara Market	14%
8	Māngere	14%
9	iSite at Auckland Airport	10%
10	Otara	9%

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n = 204

Note: Q3 2020 findings are based on domestic visitors only and are compared to Q3 2019 domestic visitor results.

Top 10 Activities South Auckland

- Of the domestic visitors that visited South Auckland in the quarter to September 2020, the most popular activities were visiting a restaurant or café (35%) followed by shopping (30%), general exploration (19%), visiting a market (17%), and sightseeing (14%).
- In comparison to the same quarter last year, last year domestic visitors went to a casino or gambling (5%) and cruising, boating or sailing (5%) in South Auckland, while this quarter visitors had a bird or wildlife experience (6%) and went to art galleries, museums or historic sites (6%).

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n = 204

DOMESTIC

#	Activity	%
	1 Restaurant or café	35%
	2 Shopping	30%
	3 General exploration	19%
	4 Visited a market	17%
	5 Sightseeing	14%
	6 Went to the beach	12%
	7 Walking, hiking, climbing, trekking, tramping	10%
	8 Bar, pub or nightclub	10%
	9 Bird or wildlife experience	6%
	10 Art galleries, museums, historic sites	6%

Attractions & Activities – Total West Auckland



Filter results by:

YE SEP 19 Q3 2019
YE DEC 19 Q4 2019
YE MAR 20 Q1 2020
Q3 2020

REASON FOR VISIT

Visitors on holiday
Visit friends & family

Domestic Visitors
 International Visitors

What, if anything, could have improved your experience of West Auckland?
(Comments from Q3 2020 respondents – DOMESTIC only)

TRAFFIC
CLEANER SPACES & RUBBISH
VALUE FOR MONEY
PARKING
ROADING

“With the North Western motorway the exits are merged with the main motorway and you’ll be cruising along in the fast lane then suddenly find that it’s become a feeder lane to somewhere else entirely! Every single time I’ve been on it with various drivers, if we’re not paying intense attention we’ve found ourselves heading in completely the wrong direction. Personally I think off ramps etc on motorways should always feed off the left hand “slow lane” as they’ve always done in the past. If it’s that difficult for us Kiwis, imagine what it must be like for visitors!”

“Being able to visit a beach near Titirangi where I stayed. They’re all closed due to sewage pollution. I found the place dirty! Couldn’t walk many tracks near there either as closed to protect Kauri.”

“Widening of some main streets especially in the Kumeu area.”




Note: When applying date filters please be aware that data from international visitors is available until Q1 2020 only. No data collection occurred in Q2 2020. From Q3 2020 onwards data is from domestic visitors only.

Top 10 Attractions – Q3 2020

West Auckland

- In the quarter to September 2020, 39% of domestic visitors that came to Auckland visited West Auckland. The average satisfaction with West Auckland’s activities and attractions was 8.3 out of 10. These results were similar to the same quarter last year.
- The most popular attractions for domestic visitors in West Auckland was Piha Beach (17%), and Titirangi (17%), followed by Hobsonville (16%). In comparison to the same quarter last year, this year domestic visitors visited Karekare beach (10%) while last year visitors went to the Waitakere Ranges (9%).



n = 168



Market share of domestic visitors in Auckland
Q3 September 2020



Satisfaction with Activities & Attractions
Q3 September 2020

Rank	Attraction	%
1	Piha Beach	17%
2	Titirangi	17%
3	Hobsonville	16%
4	Kumeu	15%
5	Kumeu Farmer’s Market	13%
6	Avondale Sunday Markets	11%
7	Bethells beach	11%
8	Muriwai beach (Gannet Colony)	10%
9	Parakai Hotpools	10%
10	Karekare Beach	10%

Note: Q3 2020 findings are based on domestic visitors only and are compared to Q3 2019 domestic visitor results.











Top 10 Activities West Auckland

- Of the domestic visitors that visited West Auckland in the quarter to September 2020, the most popular activities were visiting a beach (28%) followed by going to a restaurant or café (26%), shopping (20%), sightseeing (15%) and general exploration (15%).
- In comparison to the same quarter last year, last year domestic visitors had a bird or wildlife experience (6%) in West Auckland, while this quarter domestic visitors played golf (10%).
- 17% of holiday visitors to West Auckland visited the Arataki Visitor Centre (up from 3% last year) and 13% of holiday visitors to West Auckland played golf (up from 3% last year).

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n = 168

DOMESTIC

#	Activity	%
1	 Went to the beach	28%
2	 Restaurant or café	26%
3	 Shopping	20%
4	 Sightseeing	15%
5	 General exploration	15%
6	 Visited a market	15%
7	 Bar, pub or nightclub	13%
8	★  Golf	10%
9	 Other water activities	9%
10	 Walking, hiking, climbing, trekking, tramping	8%

Attractions & Activities Hauraki Gulf & Islands



Filter results by:

YE SEP 19 Q3 2019
YE DEC 19 Q4 2019
YE MAR 20 Q1 2020
Q3 2020

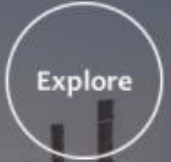
REASON FOR VISIT

Visitors on holiday
Visit friends & family

ORIGIN

Domestic Visitors 

International Visitors 



What, if anything, could have improved your experience of the Hauraki Gulf & Islands?
(Comments from Q3 2020 respondents – DOMESTIC only)

"Cheaper ferry fares for families"

"Fullers ferry service needs competition not a good experience ,maybe council needs to invest into there own ferry or a toll bridge from Manihiri to Waiheke"

"If there was better internet at the places I stayed at"

"Improve service quality"

"Better toilets"

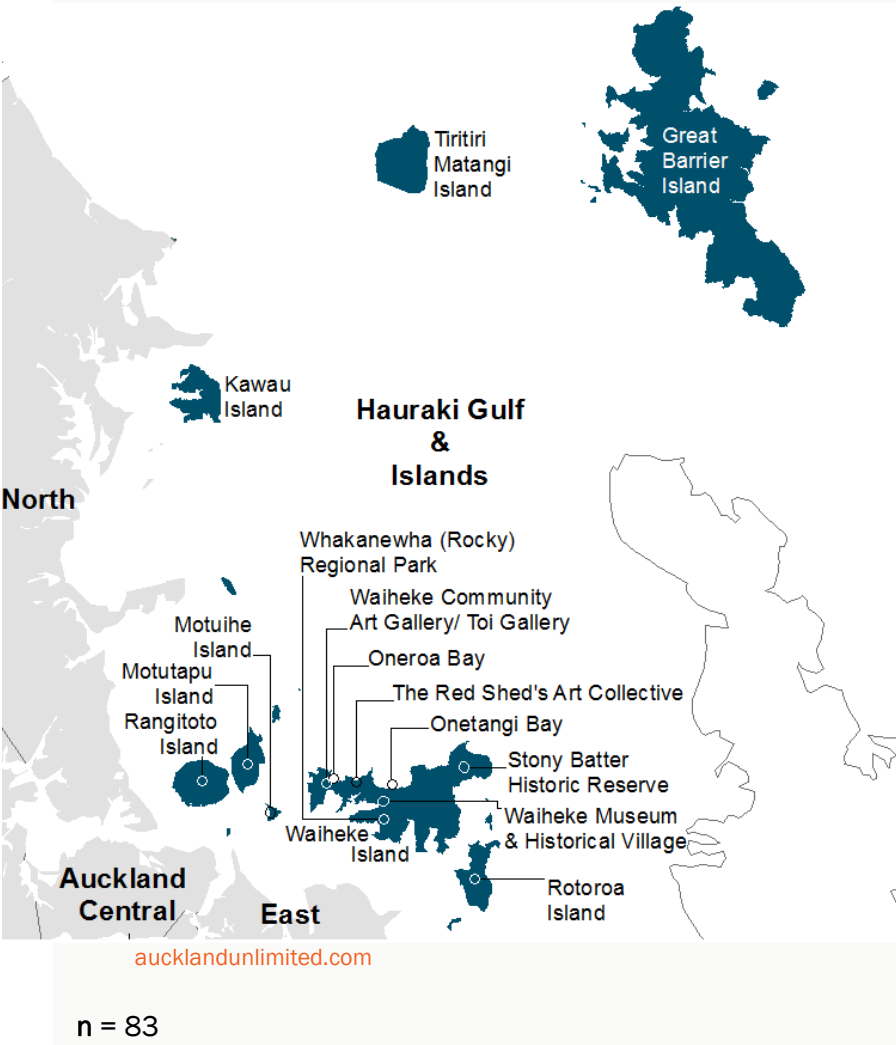
"More friendly service"



Note: When applying date filters please be aware that data from international visitors is available until Q1 2020 only. No data collection occurred in Q2 2020. From Q3 2020 onwards data is from domestic visitors only.

Top 10 Attractions – Q3 2020

Hauraki Gulf & Islands

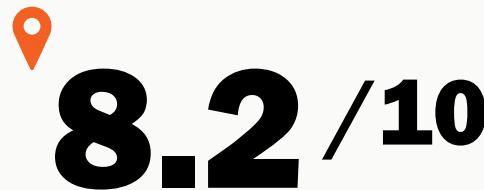


- In the quarter to September 2020, 19% of domestic visitors to Auckland visited the Hauraki Gulf and Islands. The average satisfaction with activities and attractions in this region was 8.2 out of 10. Results were similar to the same quarter last year.
- Waiheke Island was the most visited attraction (25%) followed by Rotoroa Island (16%). In the same quarter last year Onetangi Bay (Waiheke) (12%), Sunset Sea Kayak Tour (Rangitoto Island) (12%), Motutapu Island (11%), Whakanewha Regional Park (Waiheke) (10%) and Whittaker’s Musical Museum (Waiheke) (10%) featured in the domestic top ten attractions.



Market share of domestic visitors in Auckland

Q3 September 2020



Satisfaction with Activities & Attractions

Q3 September 2020

Rank	Attraction	%
1	Waiheke Island	25%
2	Rotoroa Island	16%
3	Waiheke Museum and Historical Village (Waiheke Island)	12%
4	Rangitoto Island	12%
5	Oneroa Bay (Waiheke Island)	11%
6	Kawau Island	11%
7	Other Waiheke Island bays and beaches	10%
8	Great Barrier Island	10%
9	Motuihe Island	10%
10	Wild on Waiheke (Waiheke Island)	8%

Note: Q3 2020 findings are based on domestic visitors only and are compared to Q3 2019 domestic visitor results.








Top 10 Activities Hauraki Gulf & Islands

- Of the domestic visitors that visited the Hauraki Gul and Islands in the quarter to September 2020, the most popular activities were visiting a restaurant or café (21%) followed by sightseeing (17%), visiting the beach (17%), shopping (16%) and visiting wineries or breweries (15%) – an activity that is unique to the Hauraki Gulf and Islands.
- In comparison to the same quarter last year, last year domestic visitors went cruising, boating or sailing (10%) and did extreme adventure activities (6%), while this quarter visitors went to a casino or gambling (12%) and went hunting or fishing (10%).
- 21% of VFR visitors to this region participated in sightseeing (up from 8% last year).

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n = 115

DOMESTIC

#	Activity	%
	1 Restaurant or café	21%
	2 Sightseeing	17%
	3 Went to the beach	17%
	4 Shopping	16%
	5 Wineries or breweries	15%
	6 General exploration	12%
	7 Casino or gambling	12%
	8 Visited a market	12%
	9 Hunting or fishing	10%
	10 Walking, hiking, climbing, trekking, tramping	10%







Auckland Visitor Survey – Visitor Experience Data

Agreement Scales

- Domestic visitors had a slightly more positive perception of Auckland in the quarter to September 2020 compared to the same quarter last year pre Covid-19.
- Though marginal, this quarter the largest difference was in the ease of visitors experiencing Māori culture in Auckland (+0.4).
- This quarter domestic visitors felt strongest about their feeling of safety in Auckland (6.3), while the notion that Auckland cares about the environment received the lowest agreement (5.7) – however this rating is still above average.

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Aspect	Q3 2019	Q3 2020	% change
 Auckland cares about the environment	5.5	5.7	+0.2
 It is easy to experience Maori culture in the Auckland region	5.6	6.0	+0.4
 I feel safe while in the Auckland region	6.0	6.3	+0.3
 Local people in the Auckland region are friendly	5.8	6.0	+0.2

0= Strongly disagree. 10= Strongly agree.









Q3 2019 Domestic: n= 412

Q3 2020 Domestic: n= 430

Satisfaction

- In general, this year domestic visitors were slightly more satisfied with all aspects of their visitor experience in Auckland than the same quarter last year pre Covid-19.
- In the quarter to September 2020, the total satisfaction with domestic visitors' overall visitor experience in Auckland was 7.3 out of 10 (up 0.2 on last year).
- Overall, domestic visitors were most satisfied with their experience in Auckland (7.3), followed by the level of customer experience they received (7.0) and the availability of information about things to see and do while in Auckland (7.0).
- Visitors were least satisfied with the availability of recycling bins (6.2) and clean toilets (6.2) in Auckland.

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Item	Q3 2019	Q3 2020	% change
 Availability of clean toilets	6.1	6.2	+0.1
 Availability of rubbish bins	6.5	6.7	+0.2
 Availability of recycling bins	6.0	6.2	+0.2
 Availability of Wi-Fi in public areas	6.5	6.6	+0.1
 Cleanliness and presentation of city/region	6.3	6.4	+0.1
 Availability of information about things to see and do while in the region	7.0	7.0	–
 The level of customer service experienced	6.8	7.0	+0.2
 Overall experience in the Auckland region	7.1	7.3	+0.2

Q3 2019 Domestic: n= 412
Q3 2020 Domestic: n= 430

0= Not at all satisfied. 10= Extremely satisfied.

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 Q3 September 2020, NPS was recorded at **+9**, which was up (+14) compared to the same quarter last year (-5).
- NPS increased to +22 amongst those whose main reason to visit was holiday or short break and remained +9 for those visiting family or friends (although this had increased from -7 in Q3 2019).
- Promoters (35%) were also up (+12) on Q3 2019 while detractors (26%) were slightly down (-1).
- Visitor groups that were most likely to recommend Auckland as a visitor destination include females, Hawke's Bay residents and those who visited West or East Auckland as part of their trip.

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Ngā mihi | Thank you

- KEY CONTACT

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