

Tātaki
Auckland
Unlimited



Tāmaki Makaurau Auckland Destination Overview

July 2025

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

Prepared September 2025

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Key Visitor Data



2.93^m

International Guest Nights
YE July 2025
-1.2% (to YE July 2024)



4.56^m

Domestic Guest Nights
YE July 2025
+4.2 (to YE July 2024)



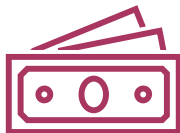
7.49^m

Total Guest Nights
YE July 2025
+2.0% (to YE July 2024)



1.01^m

International Holiday Visitor
Arrivals
YE July 2025
+8.3% (to YE July 2024)



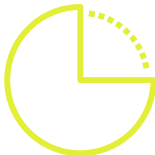
7.89^k

International VFR Visitor Arrivals
YE July 2025
+4.2% (to YE July 2024)



63.8%

Hotel Occupancy Rate
YE July 2025
-5.4% (to YE July 2024)



Key Visitor Data



INTERNATIONAL

- **Monthly international visitors (144.6k)** were **up 0.2%** compared to July 2024.
- **The year to July 2025** saw **2.27m international visitor arrivals**, an increase of **2.5%** on the previous year.
- **Australian visitors (54.5k)** were **up 9.4%** compared to last July. **The year to July 2025** saw **777.6k Australian visitor arrivals**, **up 9.1%**.
- **Holiday visitors (1.01m)** contributed the most to annual visitor numbers and **increased 8.3%** on the previous year. **Monthly holiday numbers (56.8k)** were **up 6.7%** compared with the month of July 2024.
- **VFR visitors (789.9k)** were **up 4.2% for the year**, with **monthly numbers (48.1k)** **up 0.7%**.
- **192.0k international guest nights in commercial accommodation for July** (down 9.9%) and **2.93m international guest nights for the year** (down 1.2%).

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 **356.7k domestic guest nights in commercial accommodation** for the month of **July** (down 0.4%) and **4.56m domestic guest nights for the year** (up 4.2%).
- At present, we cannot display current spend data from the Tourism Electronic Card Transactions (TECT) as the data set has been discontinued. MBIE is currently procuring a new data set to replace the TECT as a permanent measure of tourism spending. Reporting will commence as soon as this becomes available.

OVERALL

- There were **548.7k total guest nights in commercial accommodation in July** (down 4.0%) and **7.49m total guest nights for the year** (up 2.0%).
- **On average, visitors stayed in Auckland for 1.9 nights in July 2025** (down 5.0% compared to 2024).
- **Average monthly hotel Occupancy was 55.4%**, down 7.6%. **The monthly Average Daily Rate (ADR) was \$177** (down 7.3%) and **RevPAR was \$102** (down 14.8%).
- **Average Occupancy for the year was 63.8%** (down 5.4% compared to 2024), while **ADR was \$208** (down 6.2%) and **RevPAR was \$138** (down 9.4%).
- On Saturday 26th July 2025 the **Mānuka Phuel Full Metal Orchestra** and **SYNTHONY ORIGINS** was held at **Spark Arena**, and the **One NZ Warriors** played the **Titans** at **Go Media Stadium**. **Hotel occupancy reached 70.4%** (up 17.0%) and **(RevPAR) peaked to \$133** (up 13.5%).
- Looking forward over the next three months, Occupancy rates are generally higher compared to last year.
- **Occupancy-on-the-books is set to peak at 83% on Wednesday 19th November 2025**, when **Metallica** perform at **Eden Park** for their **M72 World Tour**.



Auckland Tourism – Visitor Arrivals Data

2.27m International visitor arrivals for the year to July 2025, up 2.5%

- The month of July saw 144.6k international visitors, up 0.2% compared to July 2024.
- The year to July 2025 saw 2.27m international visitor arrivals, an increase of 2.5% on the previous year.
- Holiday visitors (1.01m) contributed the most to annual visitor numbers and increased 8.3% on the previous year. Monthly holiday numbers (56.8k) were up 6.7% compared with the month of July 2024.
- VFR visitors (789.9k) were up 4.2% for the year, with monthly numbers (48.1k) up 0.7%.
- There were 151.3k business visitors (down 0.2%) in the year to July 2025, and 11.9k for the month (up 5.4%).

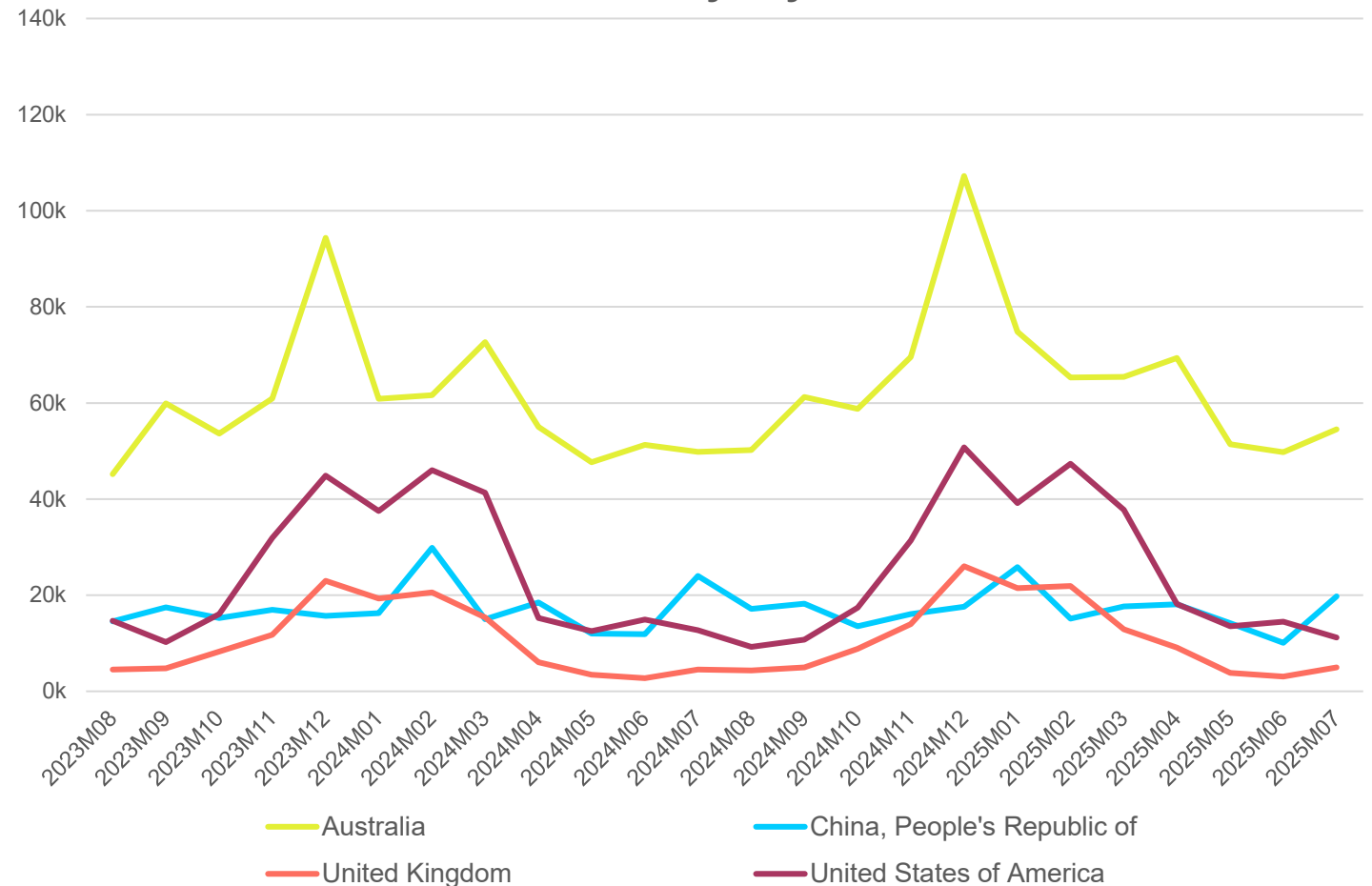


	Visitor arrivals	vs. previous year / YE
July 2025	144,649	0.2%
YE July 2025	2,273,677	2.5%

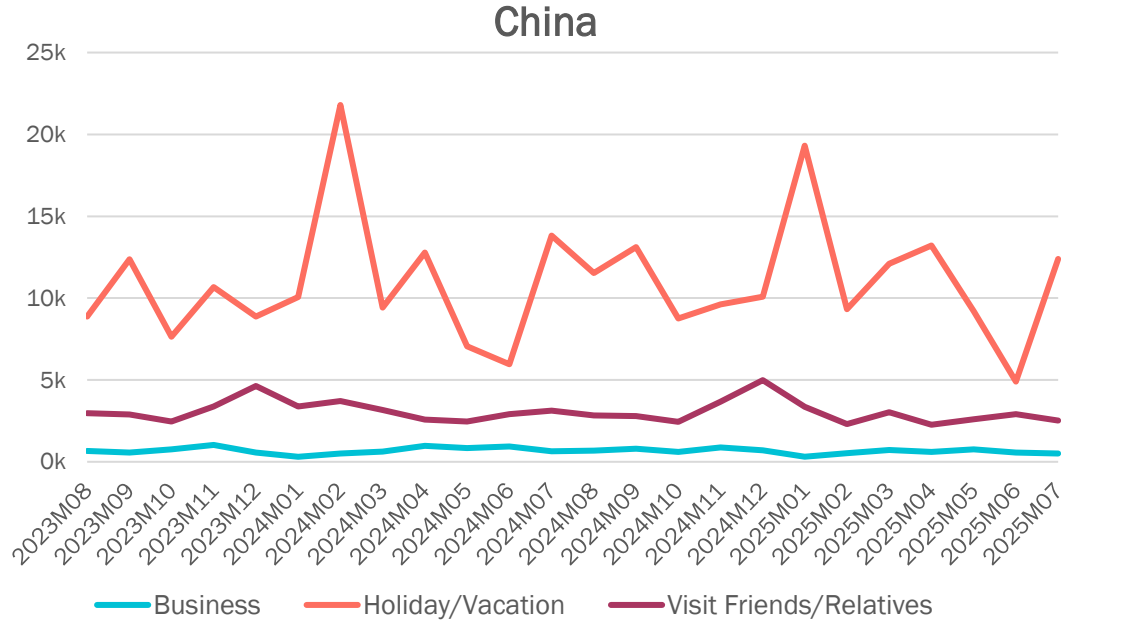
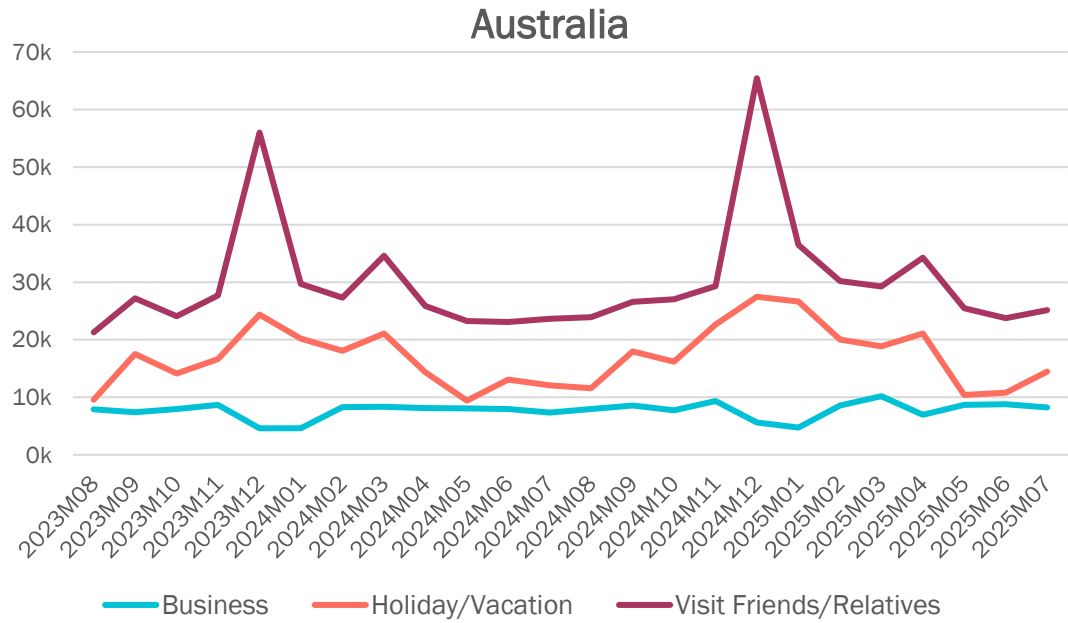
777.6k visitors from Australia for YE July 2025, up 9.1%

- Australian visitors (54.5k) were up 9.4% for the month compared to last July. The year to July 2025 saw 777.6k Australian visitor arrivals, up 9.1% compared to last year.
- The year to July 2025 saw 301.1k visitors from the US (up 1.0%), with 11.2k visitors for the month (down 12.0%).
- Visitors from China (203.4k) were down for the year (2.0%), and down (17.7%) for the month of July (19.7k).
- For the year to July 2025, there were 135.4k visitor arrivals from the UK (up 9.0%) and 4.9k visitors for the month (up 9.3%).

Visitor arrivals in Auckland by key international markets



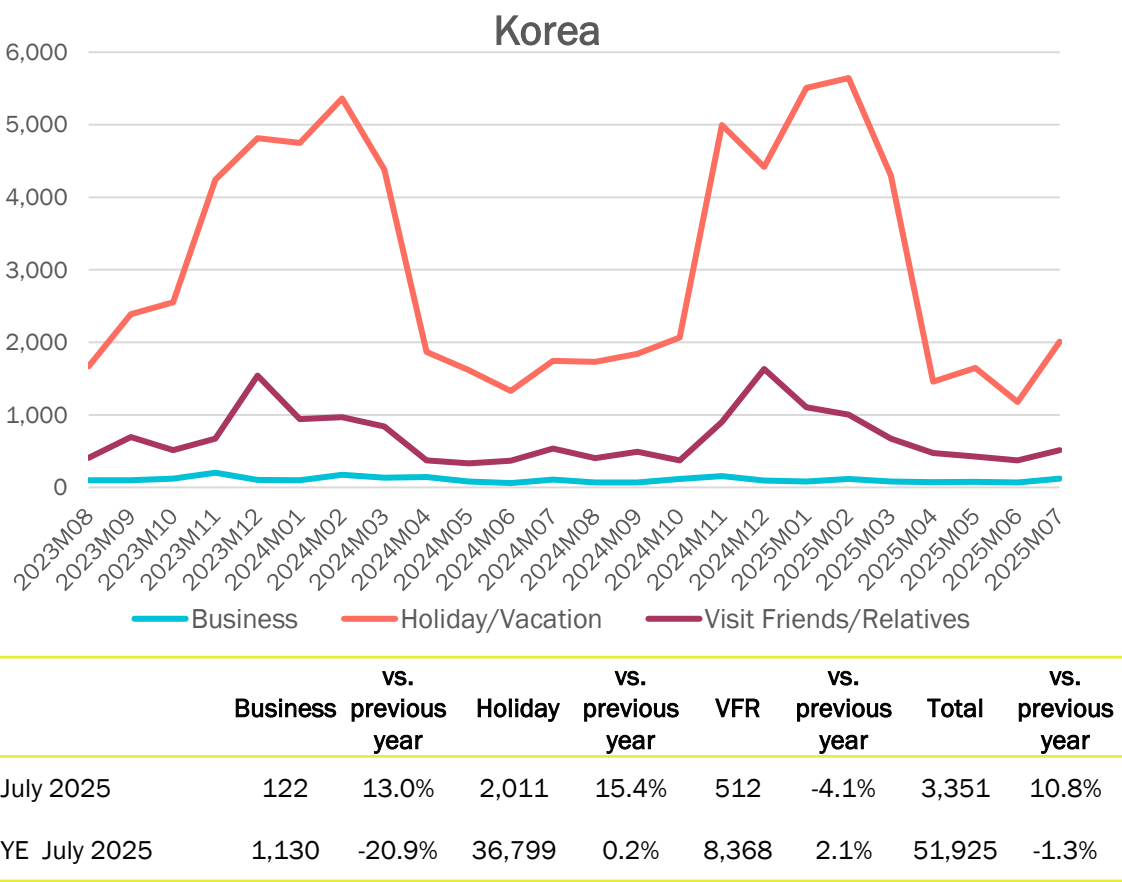
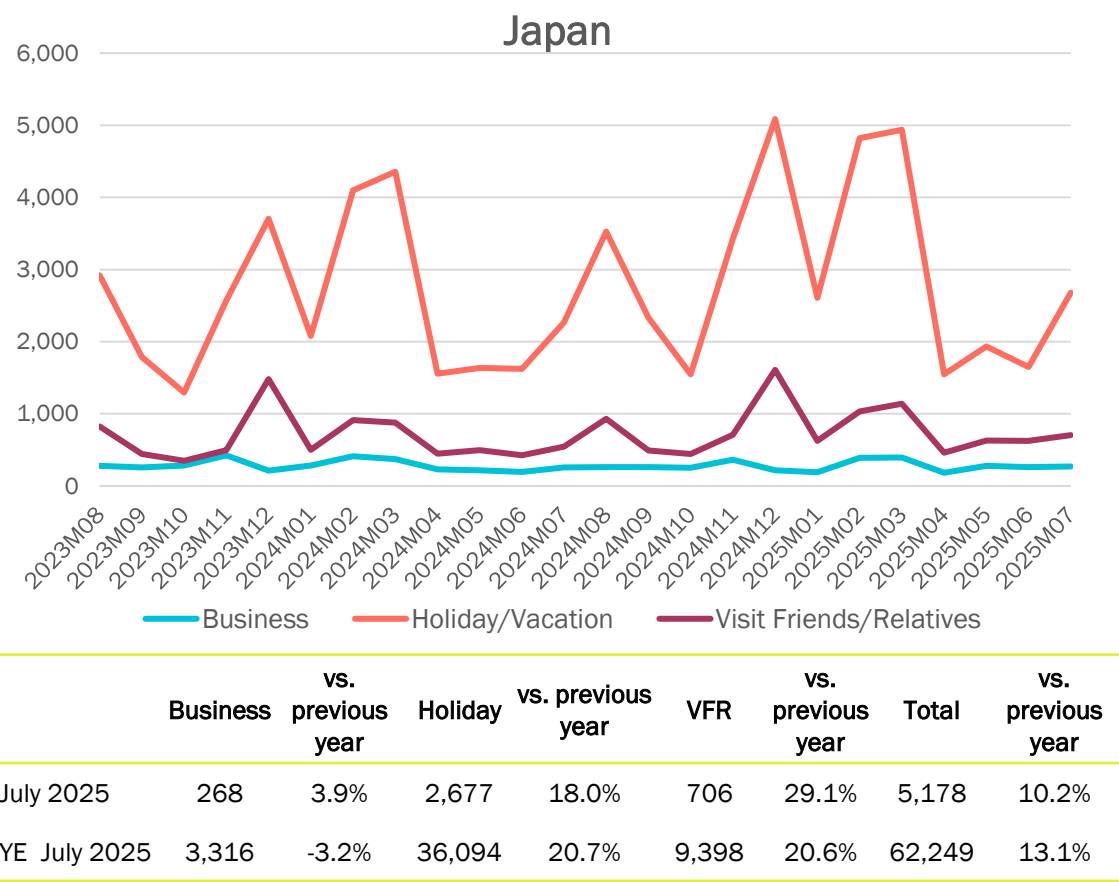
24-month visitor arrivals from individual markets



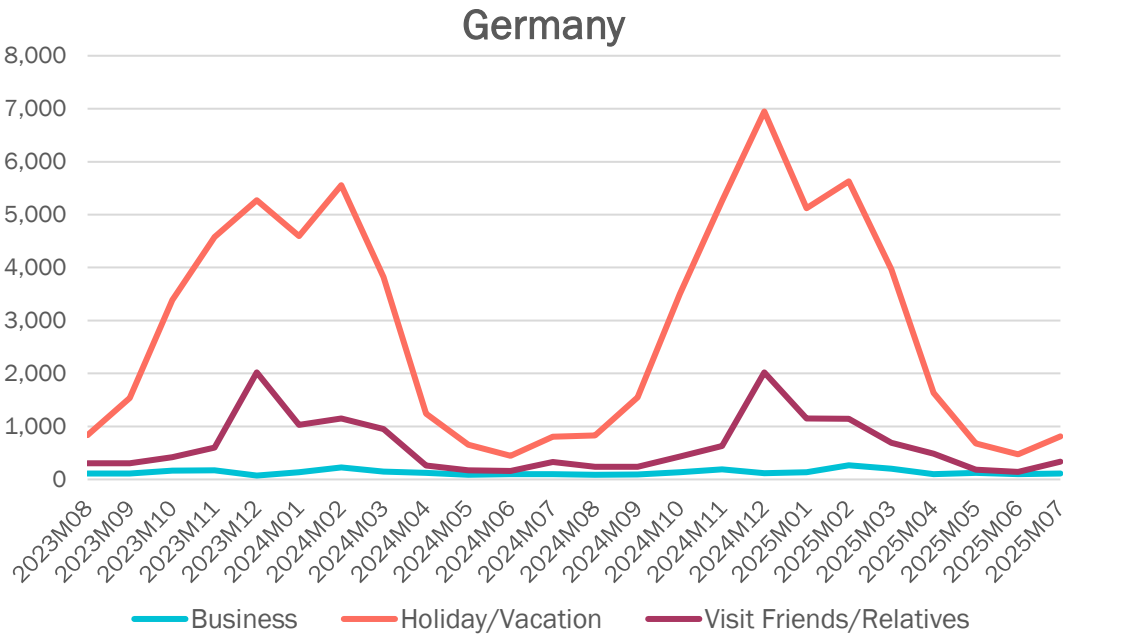
		vs.		vs.		vs.		vs.
	Business	Business	Holiday	previous	VFR	previous	Total	previous
		year		year		year		year
July 2025	8,225	12.3%	14,454	19.6%	25,161	6.5%	54,521	9.4%
YE July 2025	95,283	6.7%	218,103	14.5%	376,833	9.7%	777,586	9.1%

		vs.		vs.		vs.		vs.
	Business	Business	Holiday	previous	VFR	previous	Total	previous
		year		year		year		year
July 2025	509	-20%	12,385	-10.3%	2,525	-19.3%	19,743	-17.7%
YE July 2025	7,713	-8.0%	133,564	3.3%	35,732	-5.1%	203,371	-2.0%

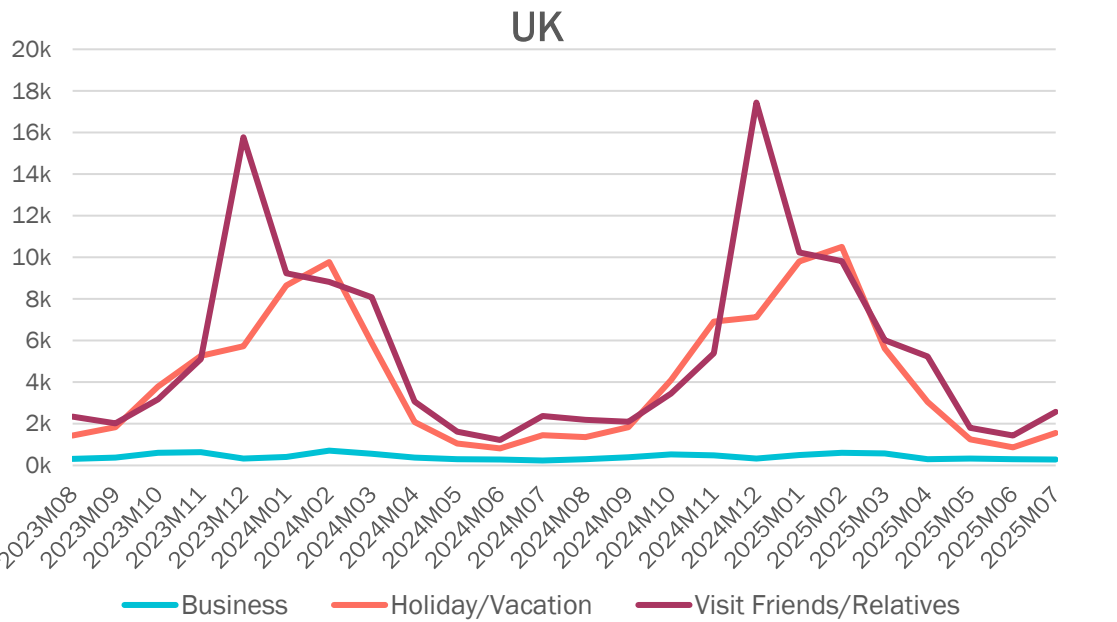
24-month visitor arrivals from individual markets



24-month visitor arrivals from individual markets

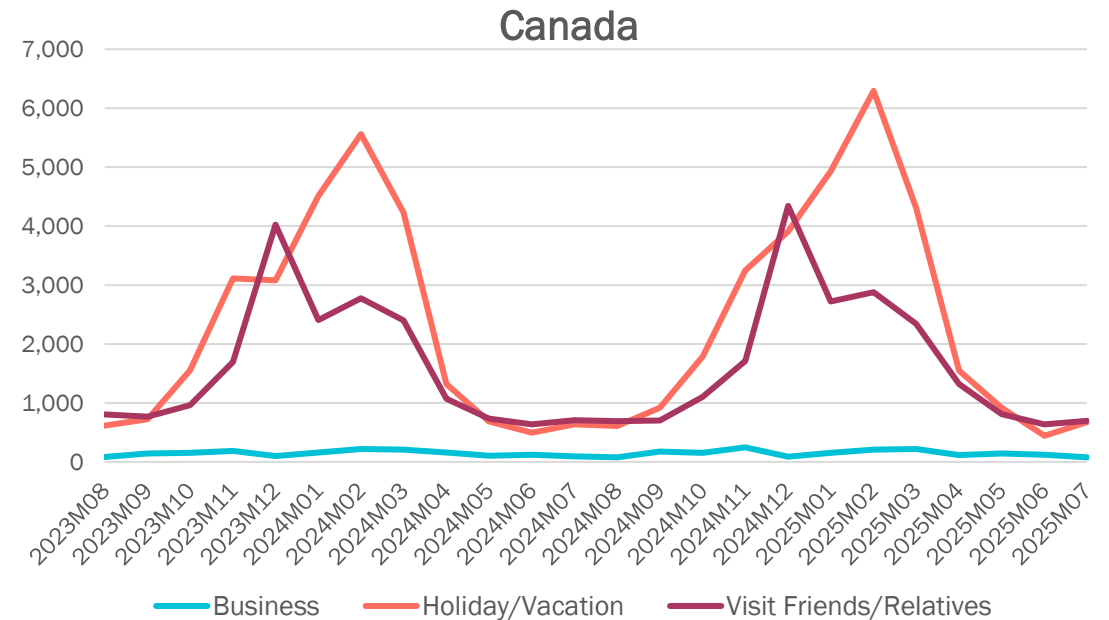


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2025	113	15.3%	815	0.7%	335	1.8%	1,951	2.5%
YE July 2025	1,660	7.0%	36,406	11.2%	7,695	-0.3%	50,829	7.8%



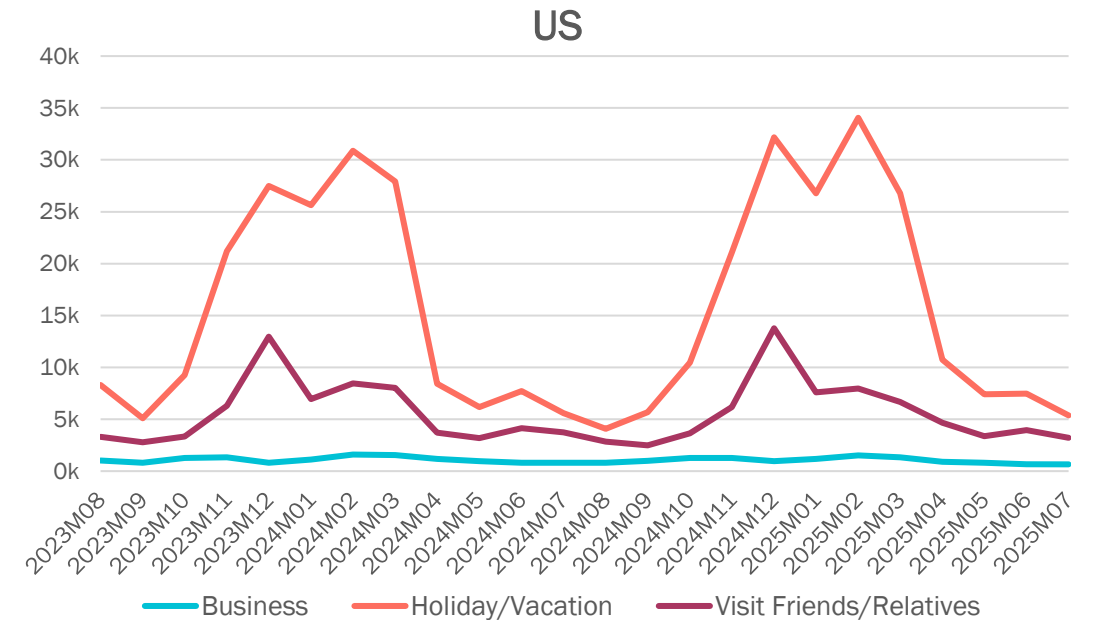
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2025	283	19.9%	1,555	7.5%	2,568	8.2%	4,945	9.3%
YE July 2025	4,931	-4.4%	53,977	13.0%	67,695	7.7%	135,351	9.0%

24-month visitor arrivals from individual markets



		vs. Business previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2025	77	-19.8%	675	5.6%	696	-1.6%	1,667	-8.9%
YE July 2025	1,777	2.0%	29,592	11.5%	19,953	5.1%	56,122	7.4%

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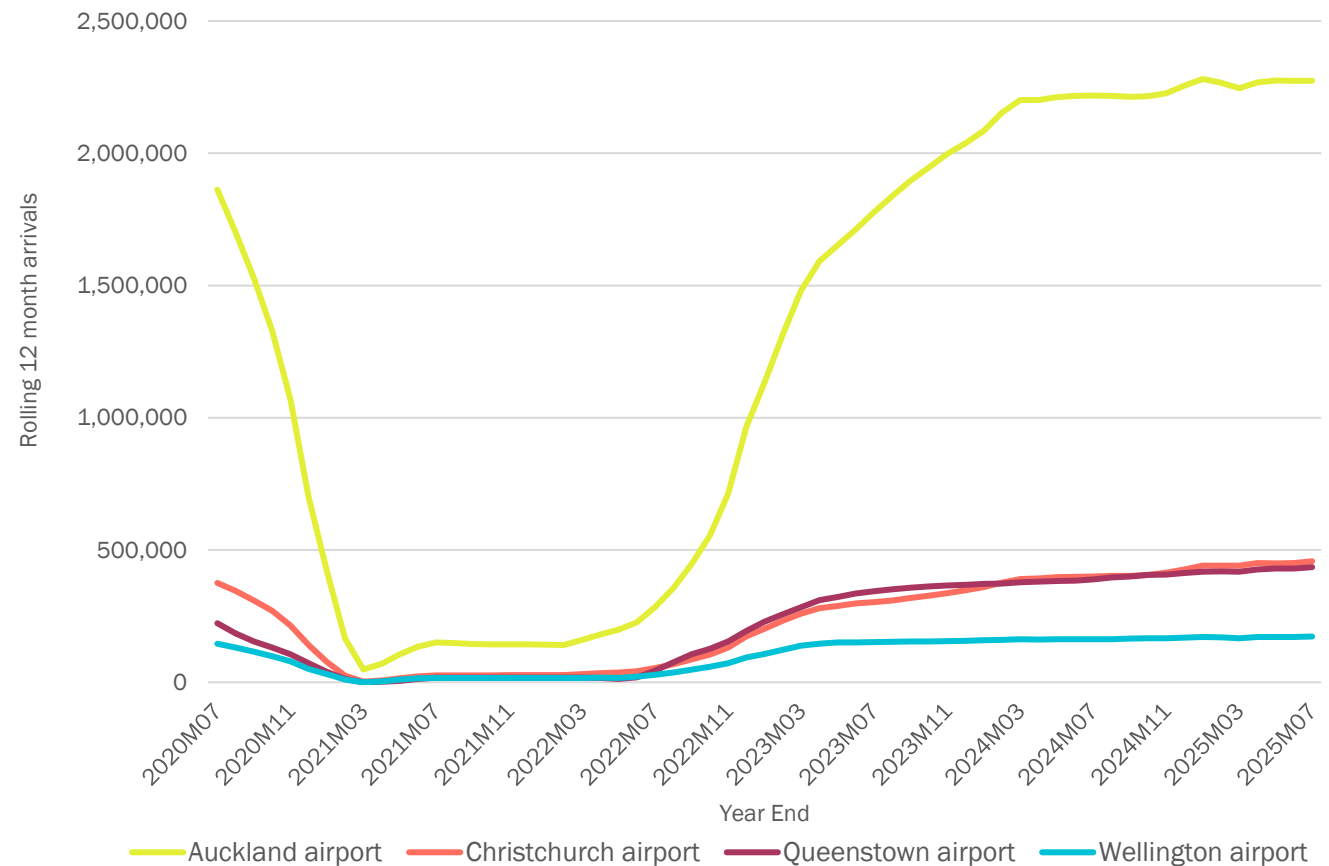
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
July 2025	667	-16.7%	5,358	-3.9%	3,208	-14.5%	11,188	-12.0%
YE July 2025	12,332	-7.0%	192,002	4.6%	66,335	-0.8%	301,148	1.0%

Auckland has seen a 2.5% 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 seen an 2.5% increase in international visitor arrivals over the last year.
- For the year ending July 2025, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 11.7%, Christchurch was up 14.3% and Wellington was up 6.5% compared to last year.

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12 month rolling visitor arrivals





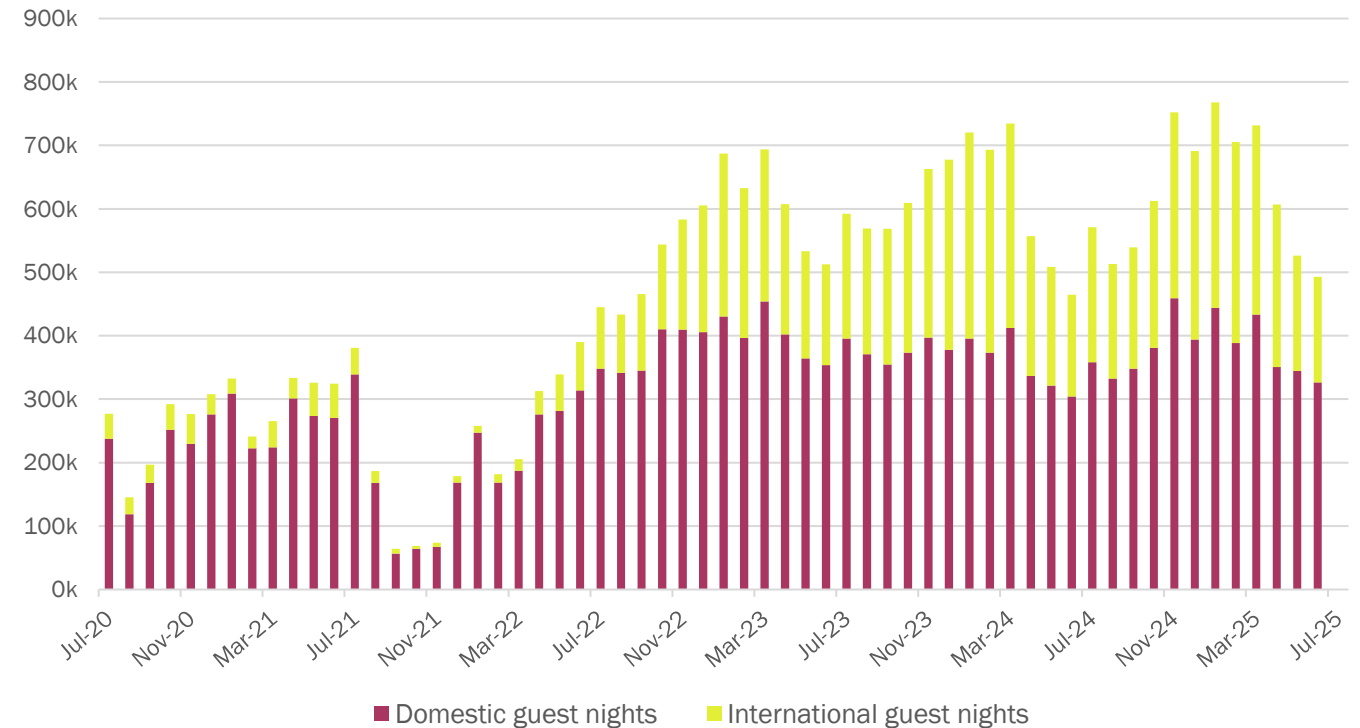
Auckland Tourism – Accommodation Data

7.49m total guest nights in commercial accommodation in YE July 2025, up 2.0%

- For the month of July 2025, there were **548.7k total guest nights** in commercial accommodation in Auckland, down 4.0% on the same month last year.
- There were **356.7k domestic guest nights** in commercial accommodation (down 0.4%), and **192.0k international guest nights (down 9.9%)** in commercial accommodation in July 2025.
- The year to July 2025 saw **7.49m total guest nights** in Auckland (up 2.0%) with **4.56m domestic guest nights (up 4.2%)** and **2.93m international guest nights (down 1.2%)**.
- For New Zealand overall, there were 2.53m guest nights in commercial accommodation in July 2025, down 0.4% compared to July 2024.

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Guest nights in commercial accommodation - Auckland



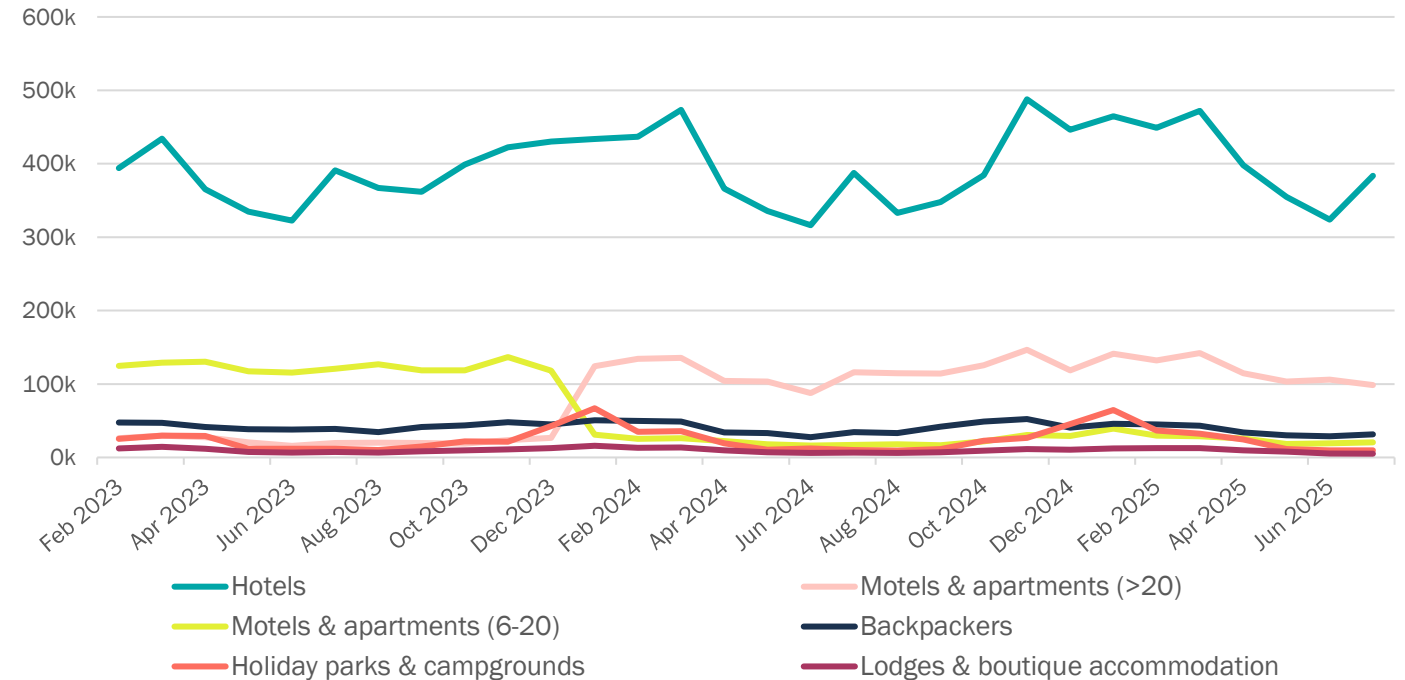
July 2025	Auckland	% change	New Zealand	% change
Total guest nights	548,700	-4.0%	2,530,200	-0.4%
Domestic guest nights	356,700	-0.4%	1,745,700	-2.1%
International guest nights	192,000	-9.9%	600,000	3.7%

383.6k guest nights in hotels for the month of July 2025, down 1.1%

- For the month of July 2025, there were **383.6k guest nights in hotels**, down **1.1%** compared to last year.
- There were **98.5k guest nights in motels and apartments (>20)**, down **14.9%** on the previous year.
- Guest nights in motels and apartments (6-20) (20.5k) were up (20.6%).
- Guest nights in backpacker accommodation decreased (down 9.5% to 31.4k) in July 2025.
- Guest nights in holiday parks and campgrounds (9.7k) were down (4.9%) for the month.
- Guest nights in lodges and boutique accommodation were also down (21.5% to 5.1k) for the month.

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Guest nights by accommodation type (monthly)

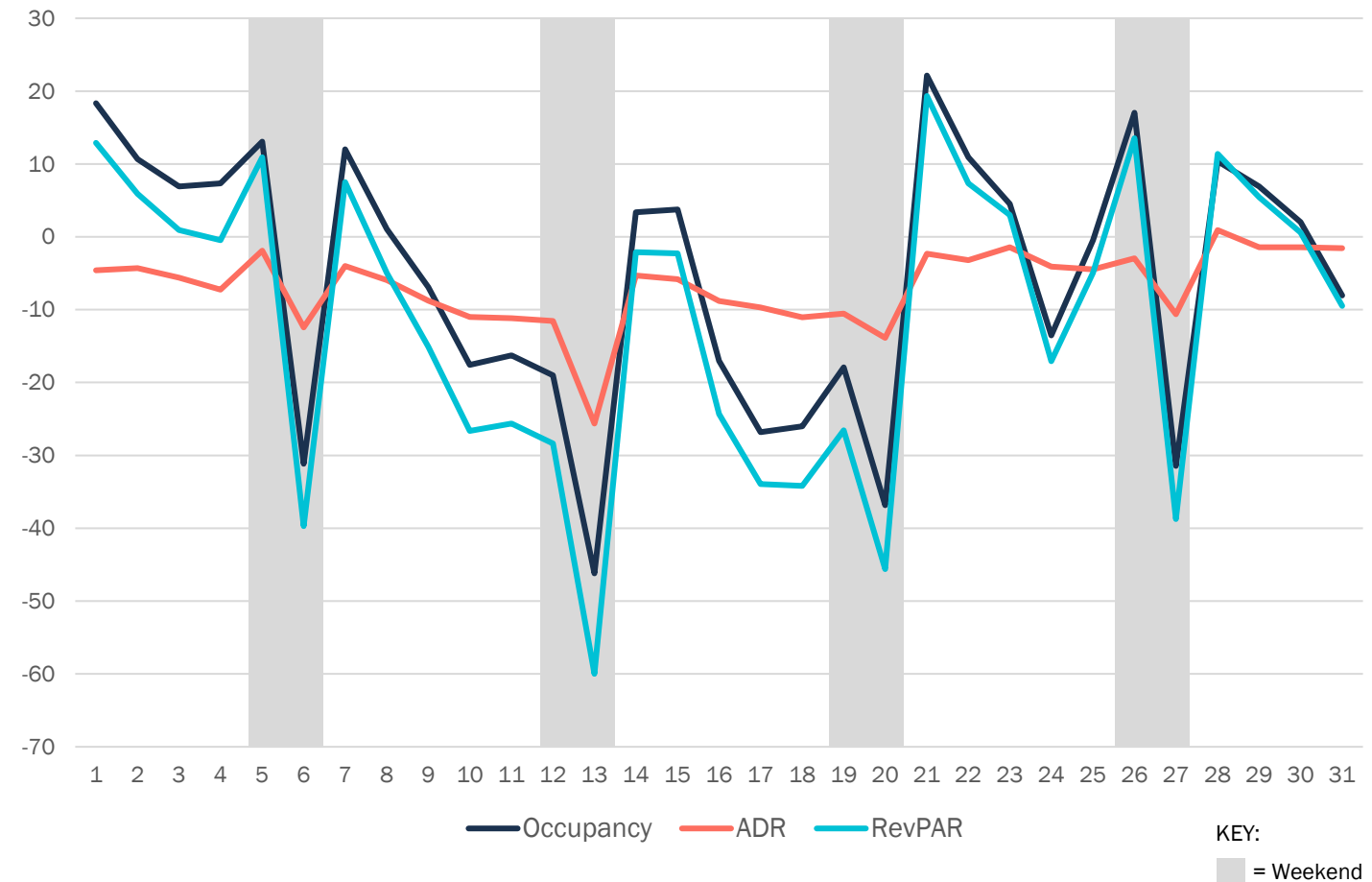


July 2025	Auckland	% change
Hotels	383,600	-1.1%
Motels & apartments (>20)	98,500	-14.9%
Motels & apartments (6-20)	20,500	20.6%
Backpackers	31,400	-9.5%
Holiday parks & campgrounds	9,700	-4.9%
Lodges & boutique accommodation	5,100	-21.5%

Average Occupancy for July 2025 was 55.4%, down 7.6%

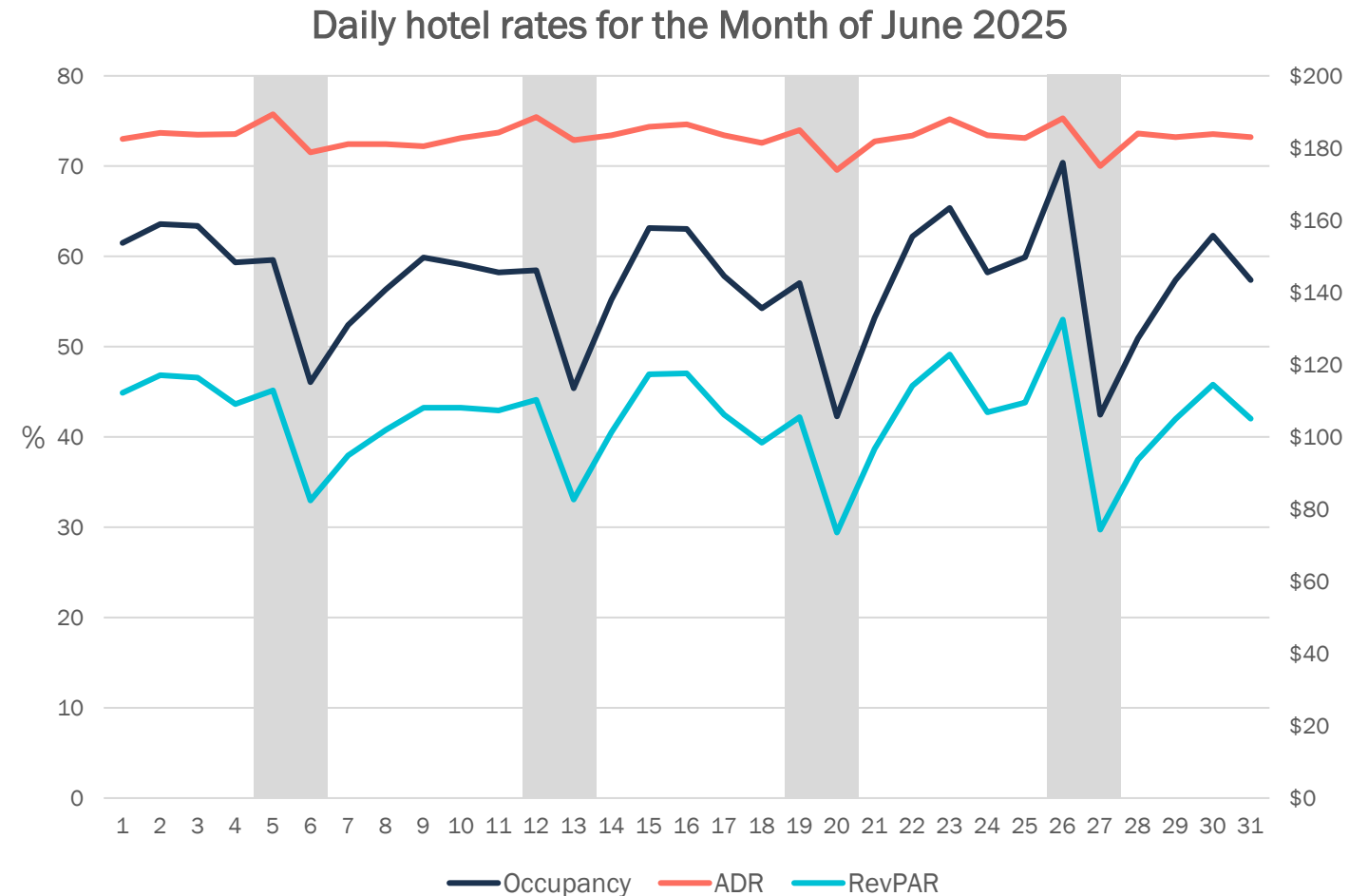
- For the month of July 2025, the **average Occupancy** was **55.4%**, **7.6% lower** compared to July 2024.
- The **Average Daily Rate (ADR)** for the month was **\$177**, down **7.3%** on last year.
- Monthly Revenue per available room (RevPAR)** for July was **\$102**, **14.8% lower** compared to last year.
- Percentage changes for **Occupancy and RevPAR** peaked on **Monday 21st July 2025** while **ADR** peaked on **Monday 28th July 2025**.
- Average Occupancy** for the year to July 2025 was **63.8%** (down **5.4%** compared to 2024), while **ADR** was **\$208** (down **6.2%**) and **RevPAR** was **\$138** (down **9.4%**).

Percent Changes for the Month of July



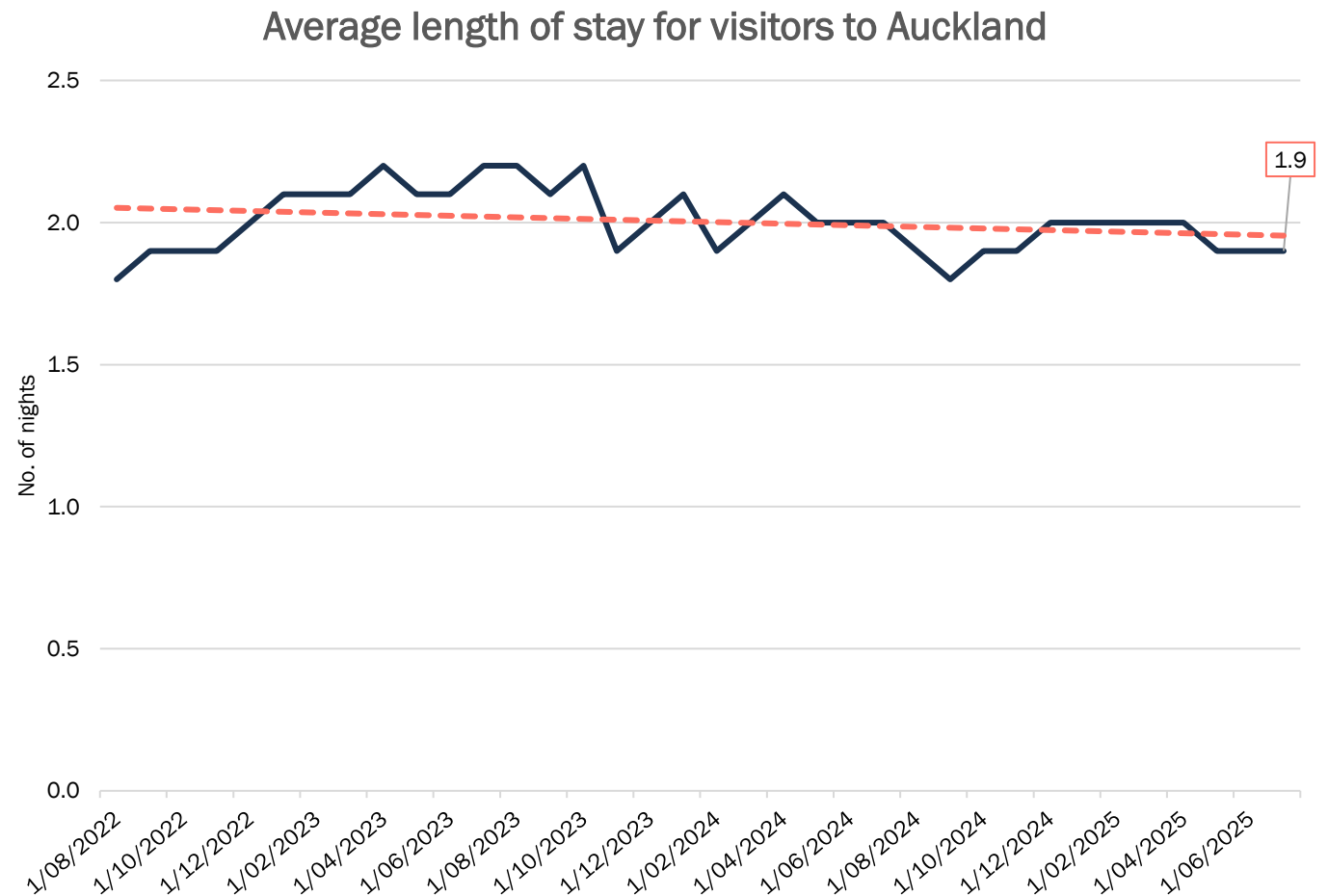
Occupancy peaked at 70.4% on Tuesday 10th July 2025, up 17.0%

- The **Average Daily Rate (ADR)** for hotels in Auckland was the highest for the month at **\$189** on **Saturday 5th** (down 1.9% on the previous year) and **Saturday 12th July 2025** (down 11.6%).
- **Hotel occupancy** reached 70.4% on **Saturday 26th July 2025** (up 17.0% on the previous year).
- **Revenue per available room (RevPAR)** peaked to **\$133** also on **Saturday 26th July 2025** (up 13.5% in comparison to last year).
- On Saturday 26th July 2025 the **Mānuka Phue! Full Metal Orchestra** and **SYNTHONY ORIGINS** was held at **Spark Arena**, and the **One NZ Warriors** played the **Titans** at **Go Media Stadium**.



On average, visitors stayed 1.9 nights in Auckland for the month of July 2025

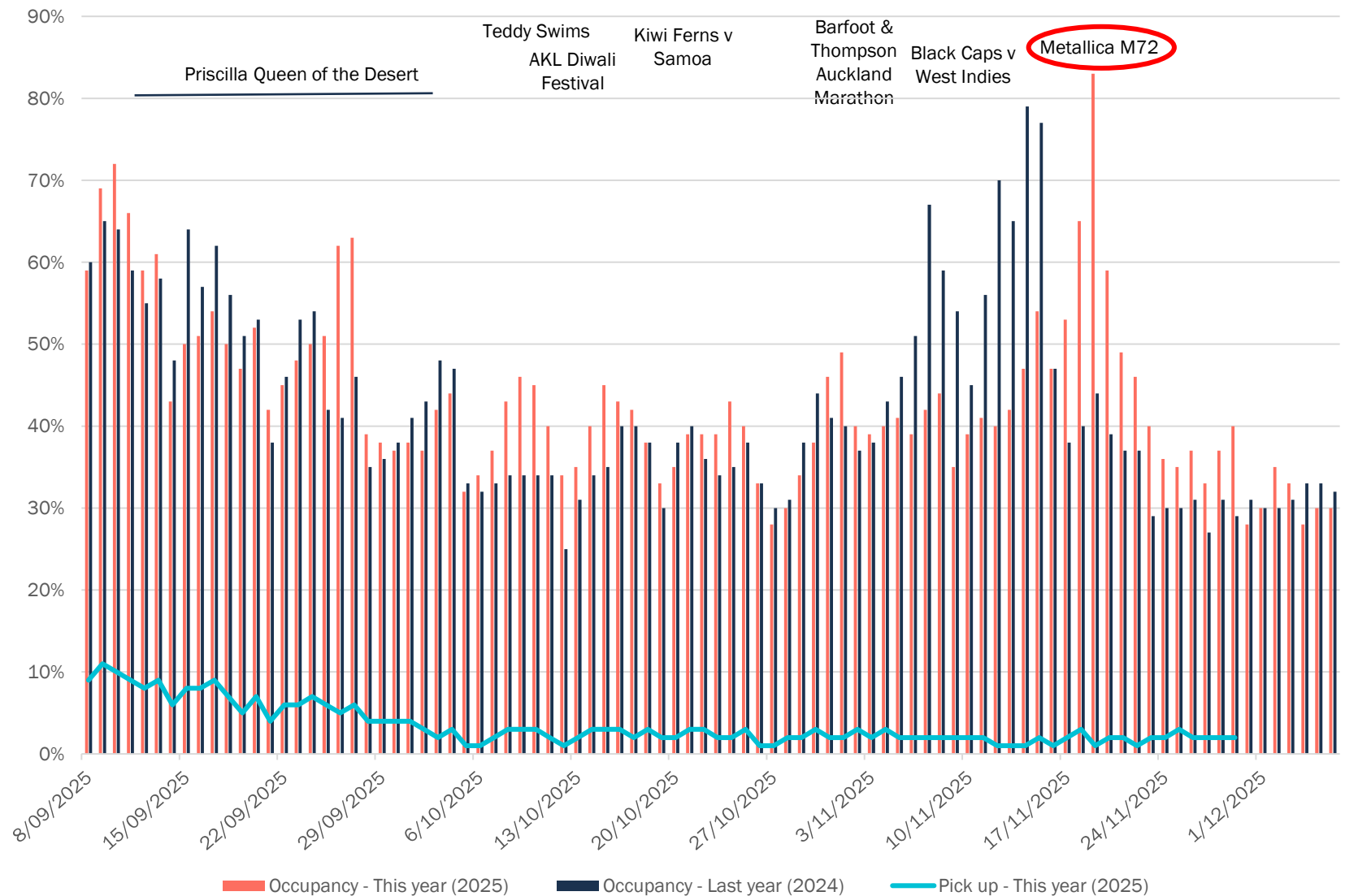
- On average, visitors stayed in Auckland for 1.9 nights for the month of July 2025 (down 5.0% compared to the previous year).
- Average length of stay for visitors to Auckland has levelled out over the last three years.



90-Day Forward Booking Occupancy Data

- Looking forward over the next three months, overall Occupancy rates are generally higher in comparison to the same period last year.
- Occupancy hit 72% on Wednesday 10th September 2025.
- Occupancy-on-the-books is set to peak at 83% on Wednesday 19th November 2025, when Metallica perform at Eden Park for their M72 World Tour.
- Pick-up refers to the number of reservations made in a recent period for future guest stays. In this context Pick-up reflects the % change in occupancy from the last reported period. For the next 90 days that is the previous Monday. For the 365-day view, from the first Monday of the prior month.

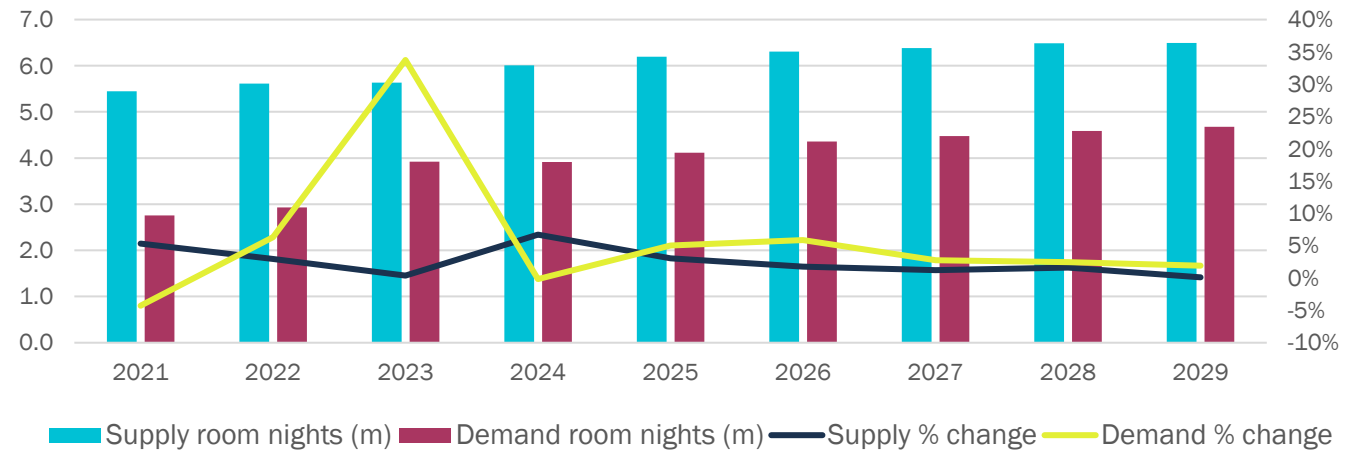
Occupancy - 90 Day Forward Outlook



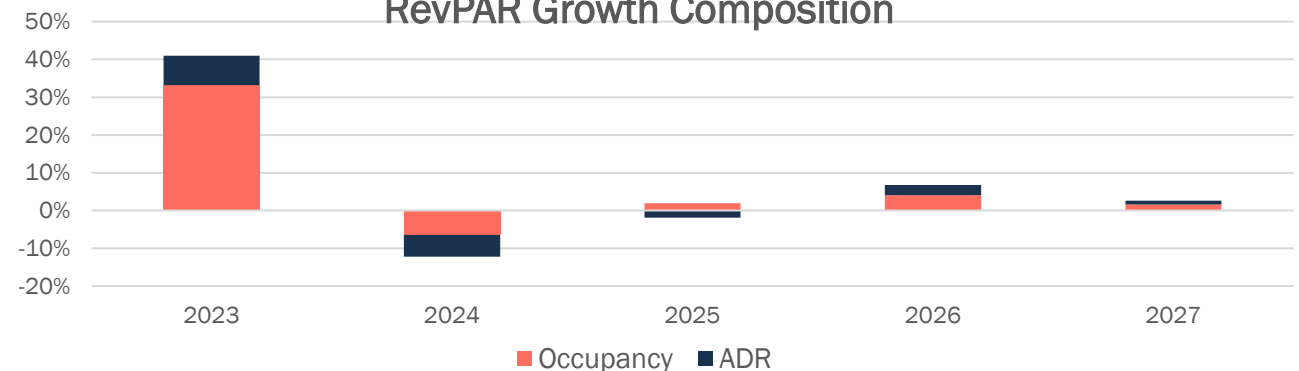
Longer term projections

- 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 2025 Q1 supply expanded 5.9%. Demand expanded 5.8%, resulting in an occupancy decline of -0.1%. Occupancy is expected to decline by -0.6% in 2025 Q2, with supply expanding 4.3% and demand expanding 3.7%.
- After declining -6.5% in 2024, occupancy is expected to expand 1.9% in 2025. ADR is expected to decrease -1.9%, resulting in RevPAR with no growth in 2025. RevPAR is expected to grow by 6.9% in 2026.
- Over the next three years, occupancy is expected to expand at an average annual rate of 2.5%, while ADR is expected to expand at an average annual rate of 0.6%.

Supply and Demand Growth



RevPAR Growth Composition



17.0k average daily rooms available in 2025, with 17.3k rooms forecast for 2026

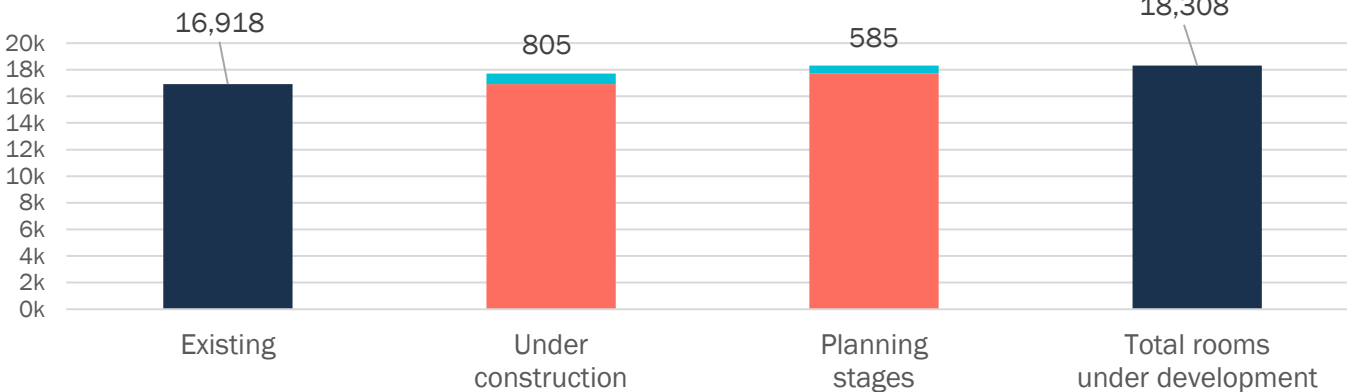
- In 2025, on average there were 17.0k daily rooms available in Auckland. The number of average daily rooms available is set to increase by 3.1%, which will supply an additional 503 rooms (compared to 2024) .
- Looking to 2026, average room supply is expected to expand by 1.8%, supplying 303 new rooms and bringing the total number of daily rooms available to 17.3k.
- Observing rooms by phase data, there was a total of 18.3k rooms (from 229 properties) in the pipeline.
- This comprised of 16.9k existing rooms (from 221 properties, 805 rooms under construction (from 5 properties), and 585 rooms in the planning stages (from 3 properties).

Average Supply

(Avg. daily rooms during year)

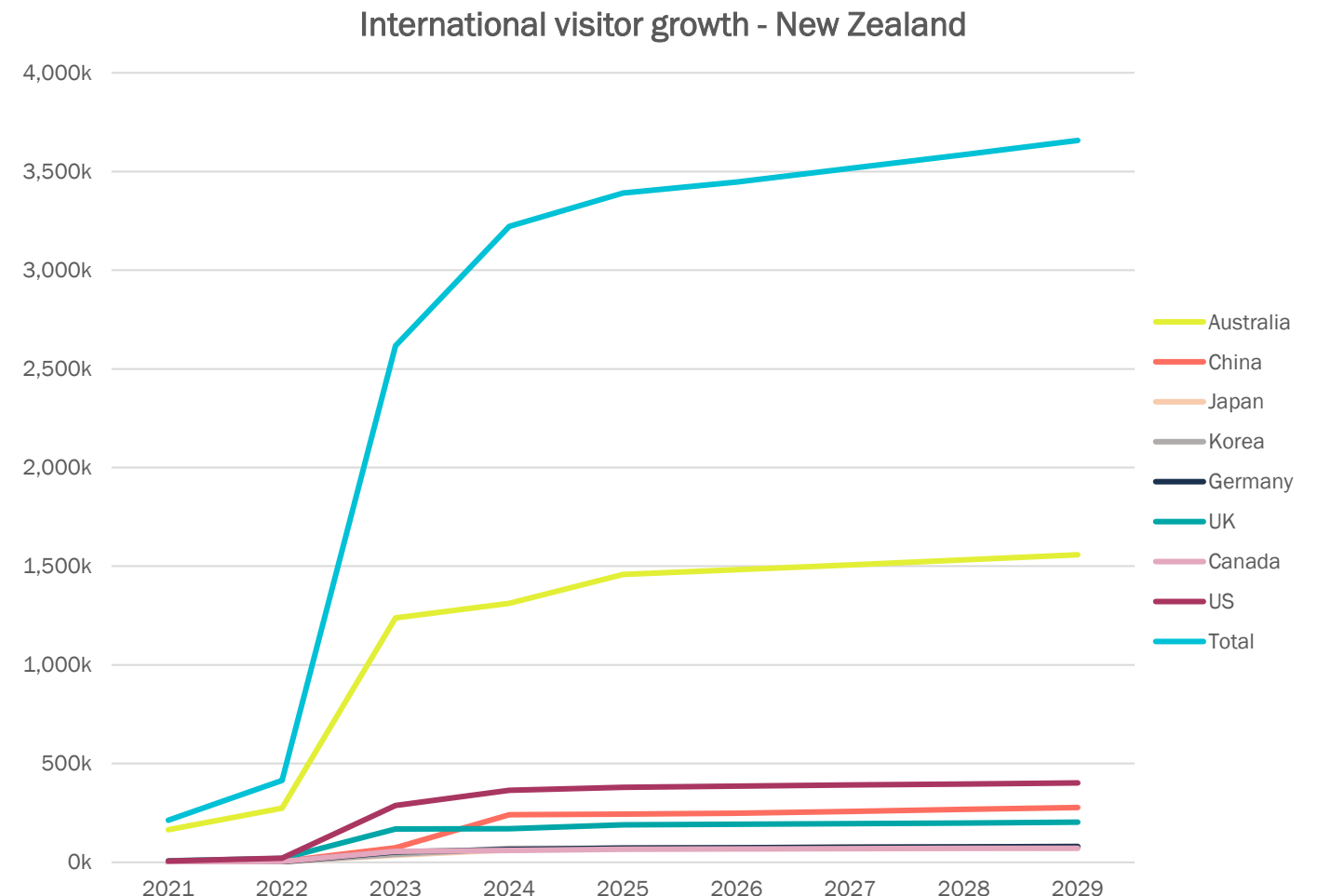
	Year	Rooms	% Chg.	Chg.
Actual	2021	14,932	5.4%	759
	2022	15,371	2.9%	439
	2023	15,433	0.4%	62
	2024	16,470	6.7%	1,038
Forecast	2025	16,973	3.1%	503
	2026	17,276	1.8%	303
	2027	17,487	1.2%	211
	2028	17,773	1.6%	285
	2029	17,793	0.1%	21

Rooms by Phase



In total, 3.66m visitors are projected to visit New Zealand in YE July 2029

- International overnight visitor arrival projections until 2029 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 10.0% from 2024 to 2029 (for Q2 2025), resulting in a possible 3.66m international visitors by YE July 2029.
- 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 1.7%. 1.56m Australian visitors are expected to visit New Zealand in the year to July 2029.



Airbnb Insight



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25%

Visiting friends & relatives



\$244

Average daily rate



48%

Aged 30-49 years



3

Average group size



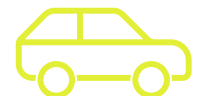
11%

Travelling with children



41%

Travelling from 482km or less



Spend data

- At present, we cannot display current spend data from the Tourism Electronic Card Transactions (TECTs) as the data set has been discontinued.
- MBIE is currently procuring a new data set to replace the TECT as a permanent measure of tourism spending.
- Reporting will commence as soon as this becomes available.



A photograph of two women walking and smiling in a modern city courtyard at dusk. The woman on the left wears a white dress and carries a tan bag, while the woman on the right wears a pink dress. In the background, there are potted plants, a building with 'FABRIC' signage, and people sitting at an outdoor cafe under a large umbrella. String lights are visible in the upper part of the scene.

Tempo – City Centre Data Insights Aug 2025

Background

We are now also presenting selected key insights from council's Tempo report (available bi-monthly).

The city centre provides a unique retail, hospitality, entertainment and cultural offering. This amenity base makes it attractive to residents, workers, students and visitors.

The pandemic had a profound impact on consumer activity and work habits in the city centre, with spending and foot traffic now consistently below pre-COVID (2019) levels.

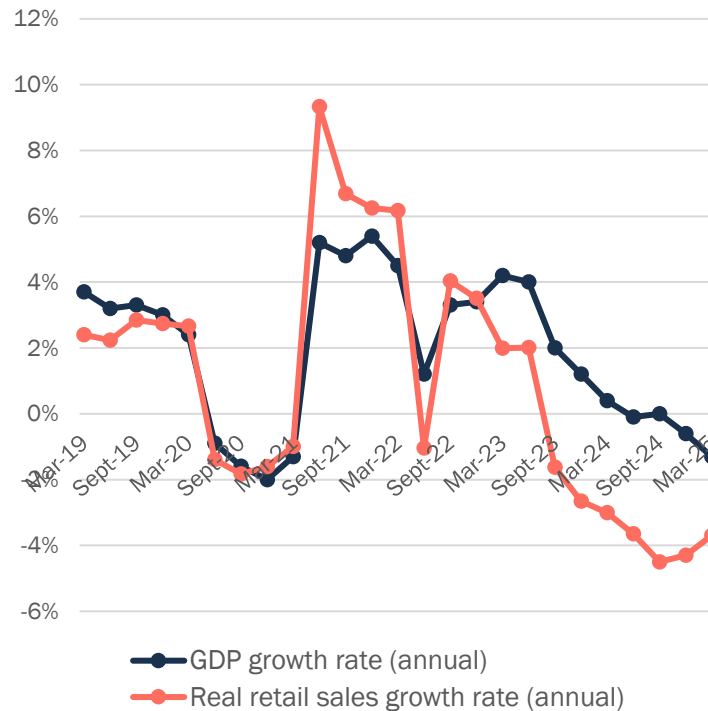
Despite the impact on consumer-facing industries, economy activity (GDP) in the city centre in 2024 was nearly 25% greater than it was in 2019. The rest of Auckland's economy only grew 12% over the same period – this is driven by a strong concentration of high-value service industries (e.g., finance, insurance, professional & technical services).

Please contact us for the full Tempo report, including foot-traffic trends, office vacancies and crime statistics.



GDP and City Centre card spending

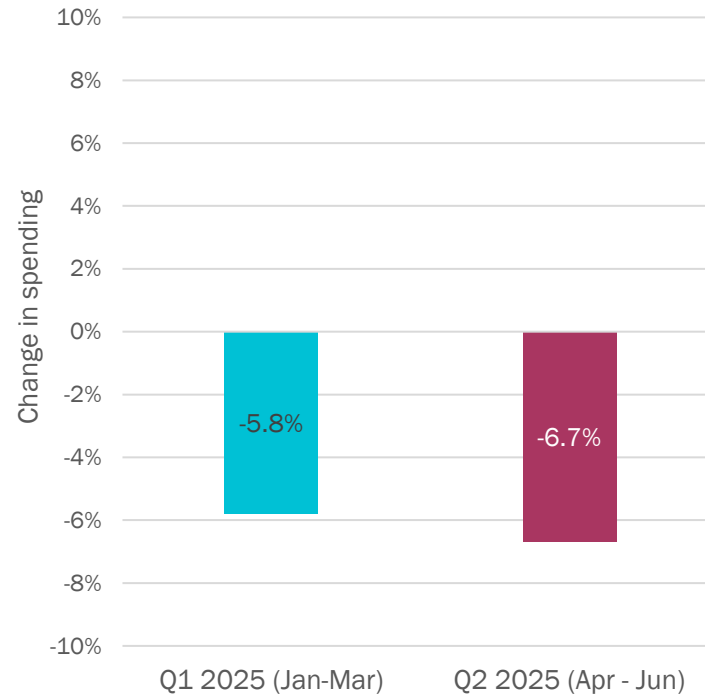
12-month GDP and consumer real retail sales* growth rate: Auckland



Source: Infometrics

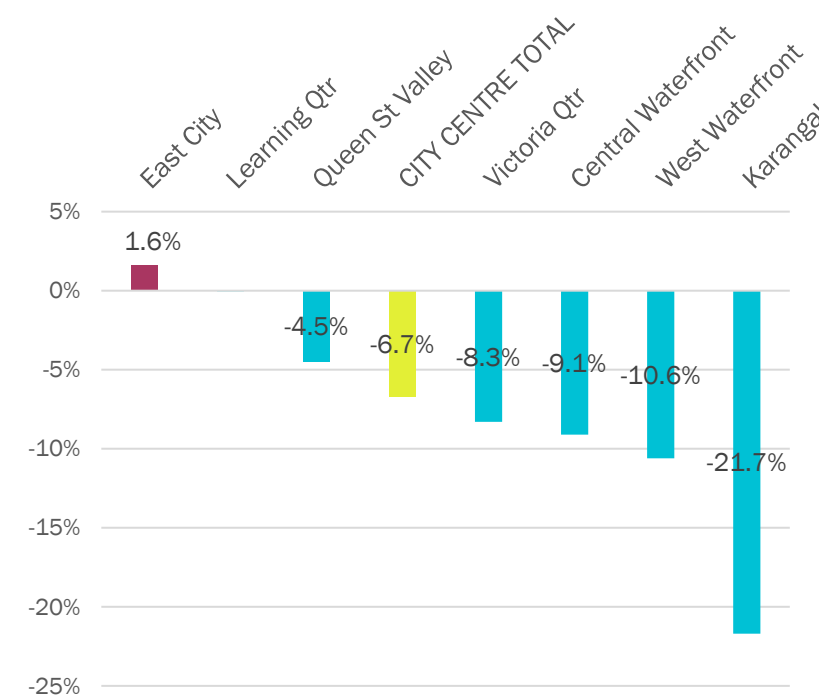
*real retail sales = controlling for inflation (CPI)

City Centre card spending compared to same period 12 months prior



Source: Marketview

Change in City Centre card spending by precinct: Q2 2025 v Q2 2024



Source: Marketview

*N.B. Karangahape data is based on precinct boundaries in the CCMP and differs from Karangahape BID data (The BID covers a wider area, including Upper Queen St down to Aotea Square, which is part of Queen St Valley in the CCMP. There is also some overlaps with the Learning Quarter)

- Challenging economic conditions over last 18-24 months.
- Spending ↓ 6.7% in Q2 2025 compared to 12 months ago.
- Spending down considerably more in Karangahape precinct.

City Centre spending

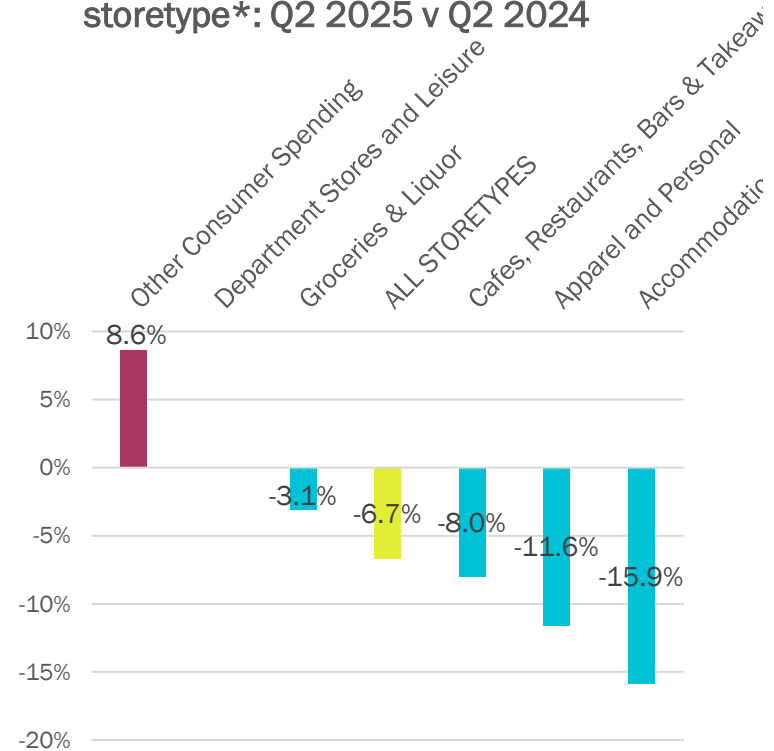
Change in City Centre card spending
by customer origin: Q2 2025 v Q2
2024



Source: Marketview

- International visitor spending up, local spending down.

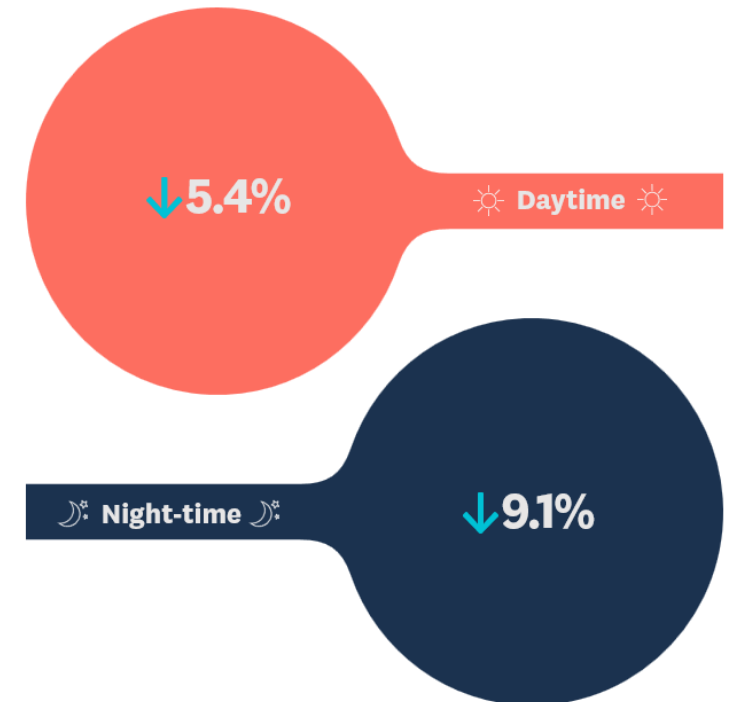
Change in City Centre card spending by
storetype*: Q2 2025 v Q2 2024



Source: Marketview

- Accommodation and clothing spending down most.

Change in spending Q2 2025
v Q2 2024



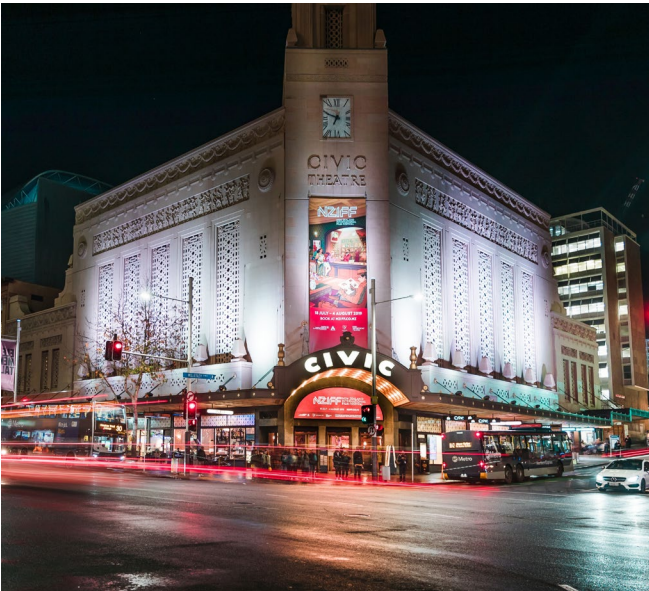
Source: Marketview

- Daytime and night time spend down.



Auckland – Major Events Data

Major Events Insights – July 2025



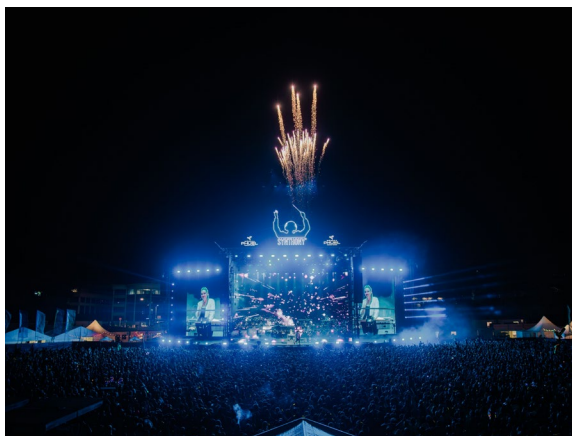
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Event	Date(s)	Venue	Findings
Matariki Festival 2025	7 June – 13 July 2025	Across Auckland	
A Century of Modern Art	7 June – 28 September 2025	Auckland Art Gallery Toi o Tāmaki	
Oliver! the Musical	5 – 6 July 2025	Bruce Mason Centre	
The Art of Banksy	7 July – 3 August 2025	Aotea Centre	
The Gruffalo	9 – 13 July 2025	Bruce Mason Centre	
One NZ Warriors v Wests Tigers	13 July 2025	Go Media Stadium	On Saturday 26th July 2025 the Mānuka Phue! Full Metal Orchestra and SYNTHONY ORIGINS was held at Spark Arena, and the One NZ Warriors played the Titans at Go Media Stadium. Hotel occupancy reached 70.4% (up 17.0%) and (RevPAR) peaked to \$133 (up 13.5%).
Taniwha	16 June – 13 July 2025	Aotea Centre	
Northern Mystics vs VIP Tactix	13 July 2025	The Trusts Arena	
Deep Hard n Funky	19 – 20 July 2025	Auckland Town Hall	
Aotea Square Ice Rink	20 June – 20 July 2025	Aotea Square	
Illusionist Anthony Street	25 July 2025	Aotea Centre	
Mānuka Phue! FULL METAL ORCHESTRA	26 July 2025	Spark Arena	
One NZ Warriors v Titans	26 July 2025	Go Media Stadium	
Wharenuī Harikoa	5 – 27 July 2025	The Civic	
Whānau Mārama: New Zealand International Film Festival 2025	30 July – 10 August 2025	The Civic	

Mānuka Phuel Full Metal Orchestra

Date(s): 26 July 2025

Venue: Spark Arena



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8.9^k
Attendance




35%
Of attendees were visitors




\$1.47^m
GDP




5.2^k
Visitor nights




\$274
Average spend per night



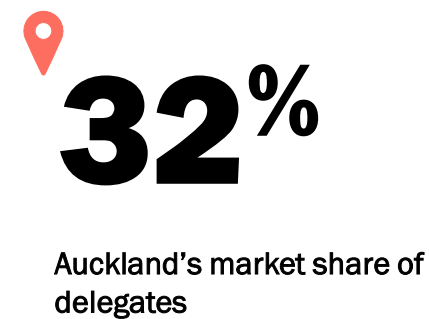
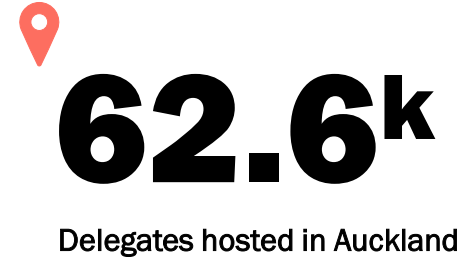


Auckland – Business Events Data

Business Events Insights Q2 2025



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Auckland attracted the highest number of business delegates (62.6k) in New Zealand in Q2 2025

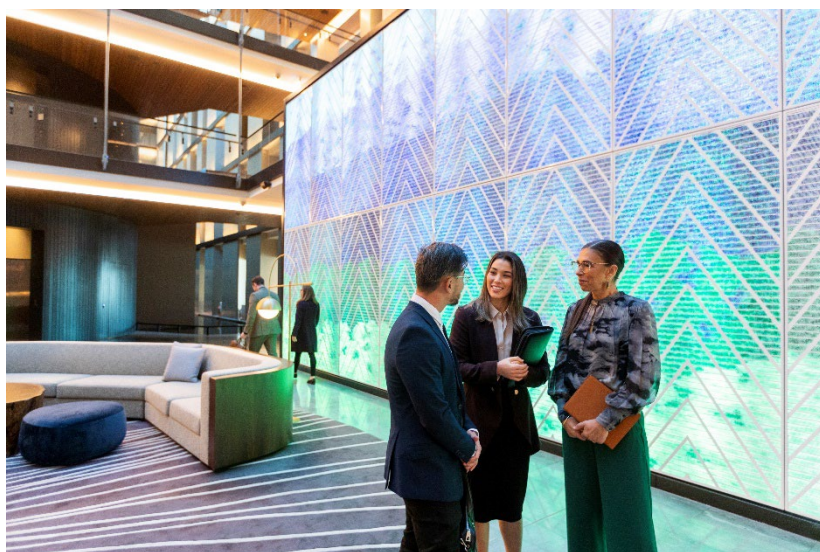
Total number of business events – Regional comparison



Total number of delegates – Regional comparison

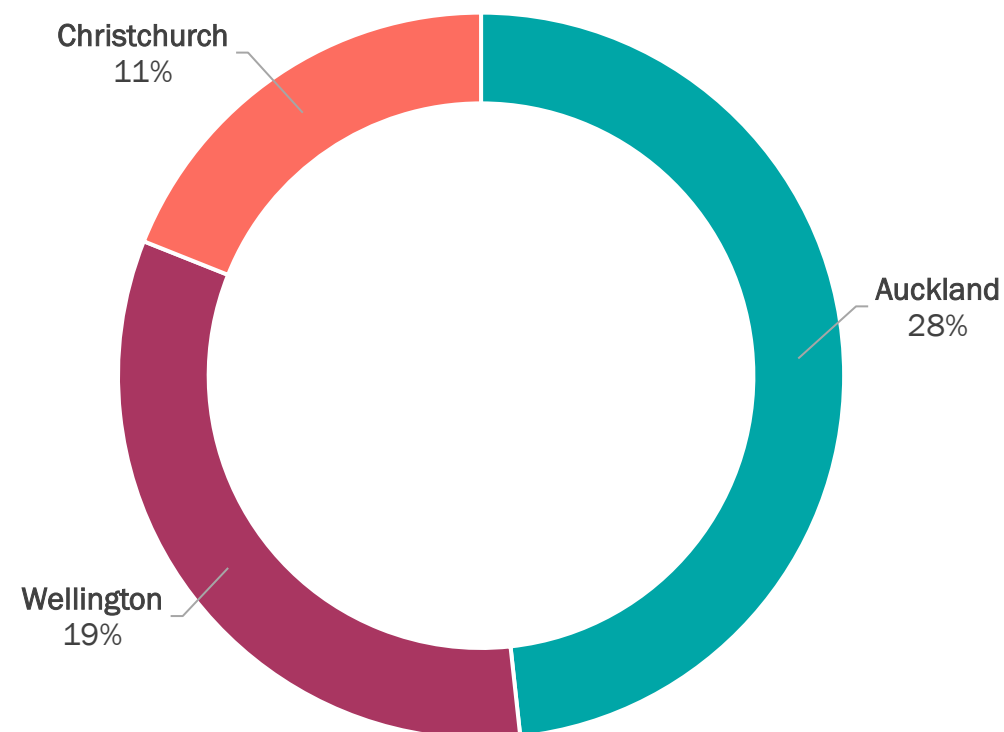


Auckland had 28% of all business events in New Zealand in Q2 2025



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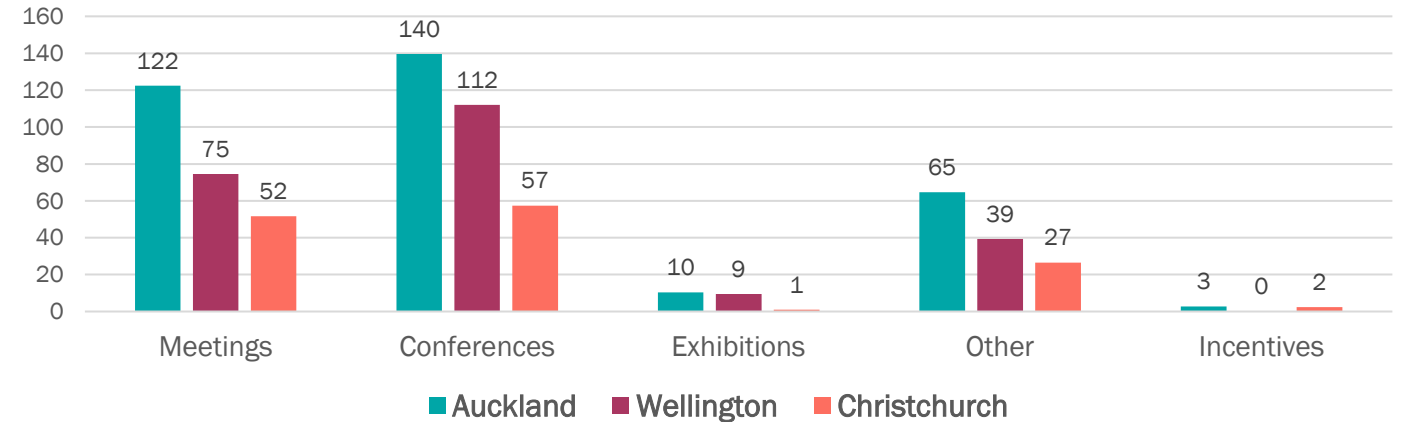
Business Event Market Share - Regional Comparison



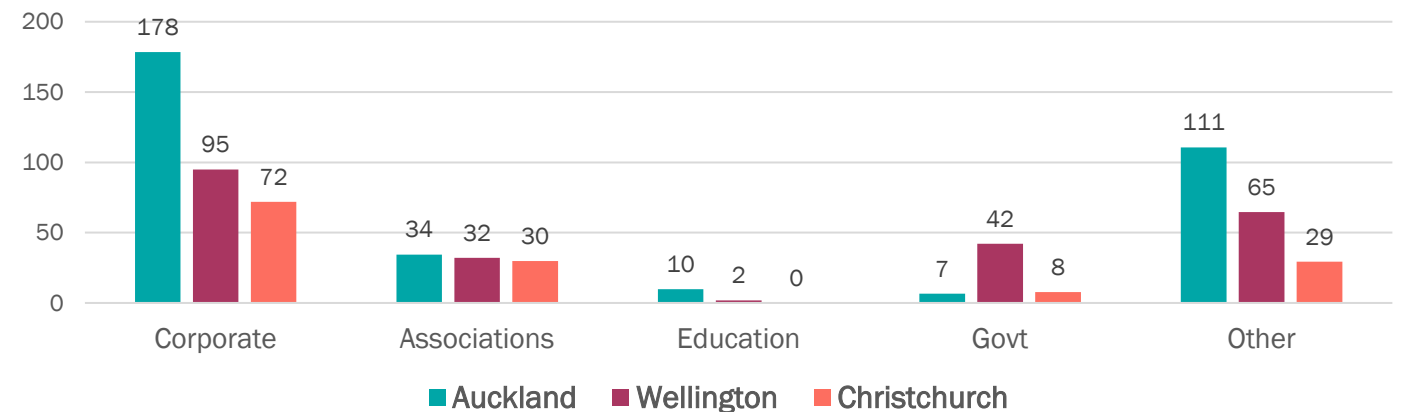
Auckland hosted the most conferences, meetings, exhibitions, and other business events in NZ Q2 2025

- Looking at business event type, **Auckland hosted the most conferences (140), meetings (122), other business events** like social functions and Gala dinners (65) and **exhibitions (10)** out of the three featured regions in Q2 2025.
- The majority of business events in Auckland were for **Corporate customers (178)**, followed by **Other customers (111)**, then **Associations (34)**, and **Education customers (0)**.
- Among the three regions, Wellington recorded the most **Government-related business events (42)**.

Business Events By Event Type



Business Events By Customer Type

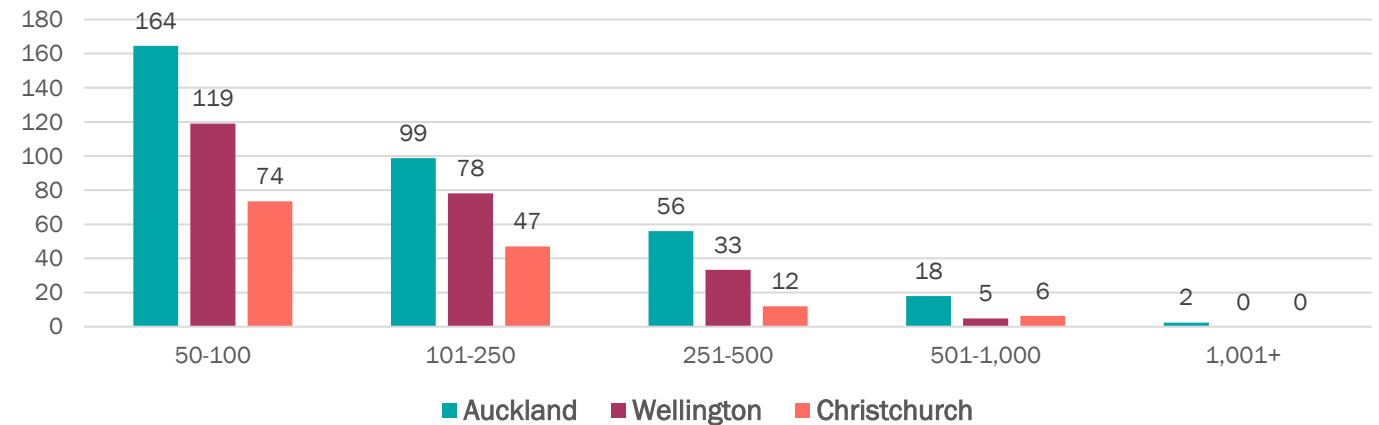


72% of all business events in Auckland were one-day events in Q2 2025

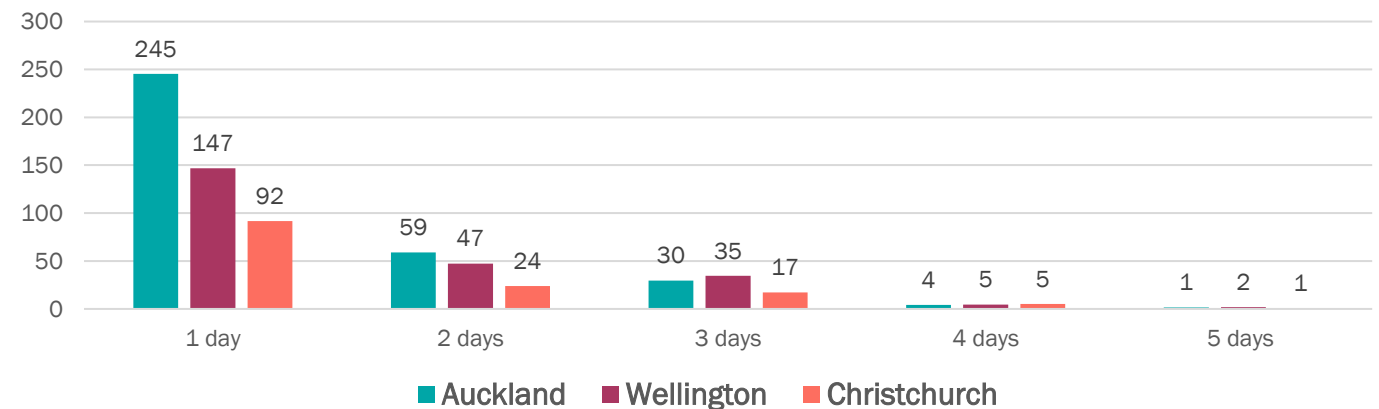
- In Q2 2025, 48% of all business events held in Auckland were small to medium-size events hosting between 50-100 delegates (164 events). In comparison to other regions, Auckland hosted the most small business events.
- 29% of business events in Auckland were medium-sized events with 99 events that hosted between 101-250 delegates.
- 16% of business events (56) in Auckland hosted between 251-500 delegates.
- Auckland had 20 large-scale events that hosted 500+ delegates in Q2 2025.
- In Q2 2025, 72% of all business events in Auckland were one day events (245), while 28% were multi-day events. 17% were held for a duration of two days (59), and 10% ran over the course of three days or more (35).

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No. of business events - Regional comparison



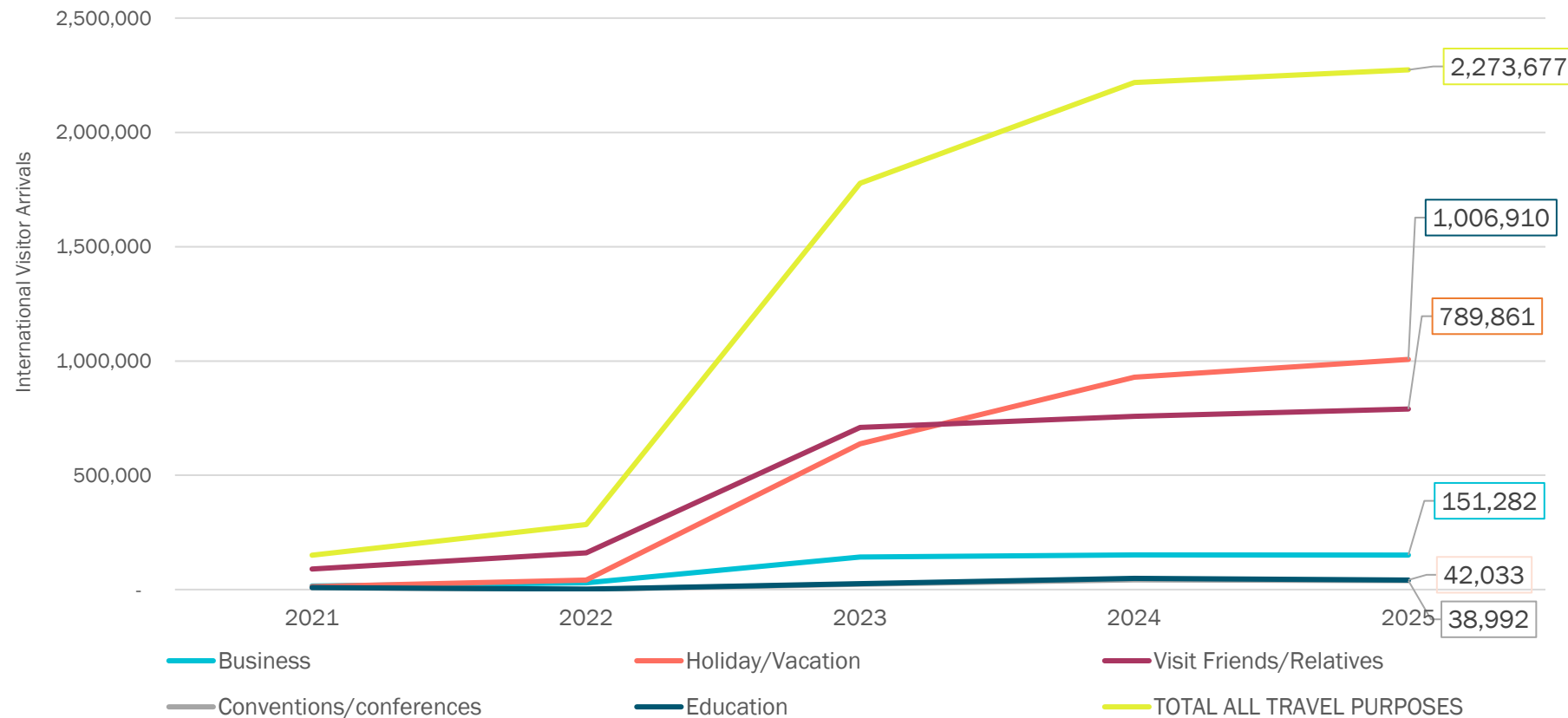
Duration of event - Regional comparison



A group of six people (three men and three women) are standing on a grassy hill, holding hands in a circle, looking down at their hands. They are silhouetted against the bright sunset. In the background, a city skyline is visible, including a prominent tower (CN Tower) and a body of water. The sky is a mix of orange, yellow, and blue.

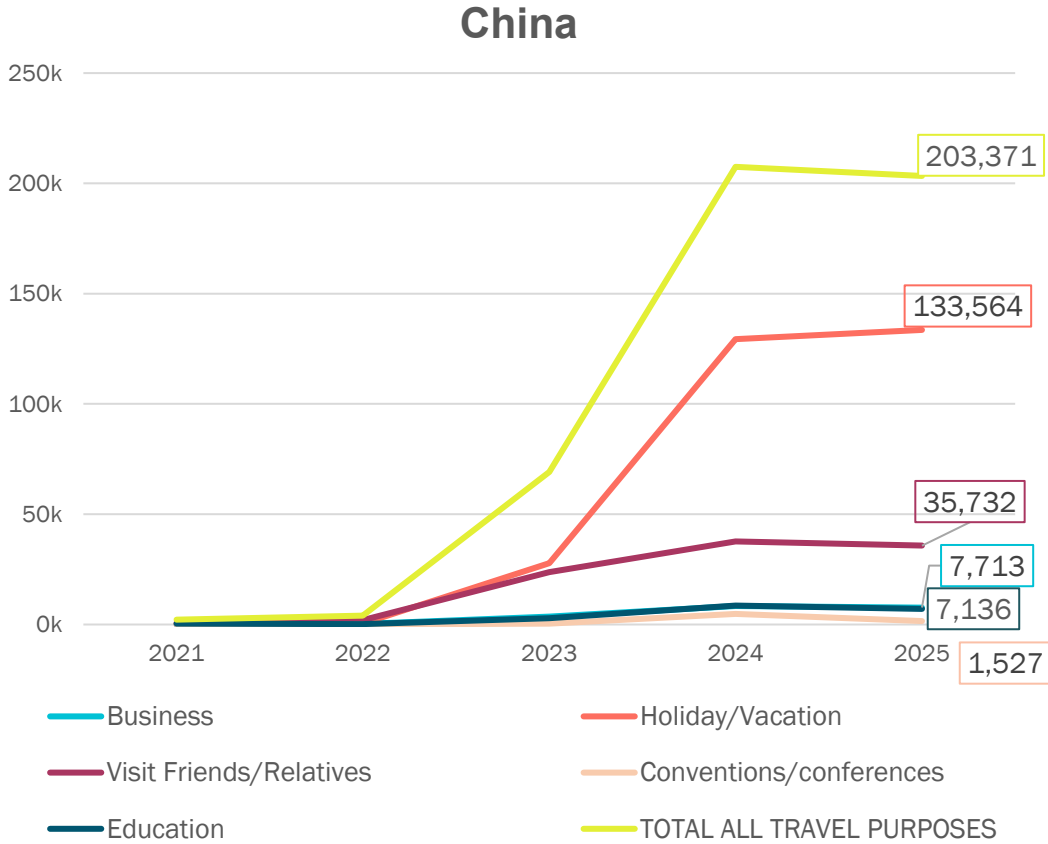
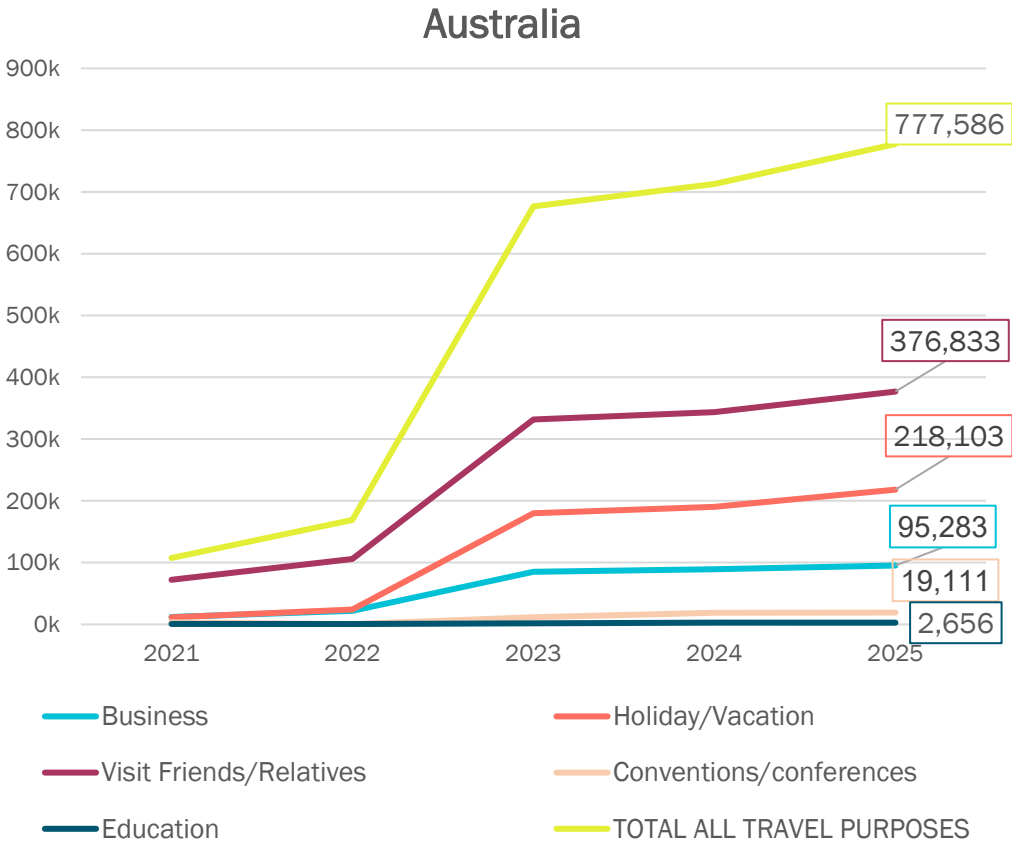
Five-year trends in key markets

Five-year visitor arrivals to Auckland, YE July

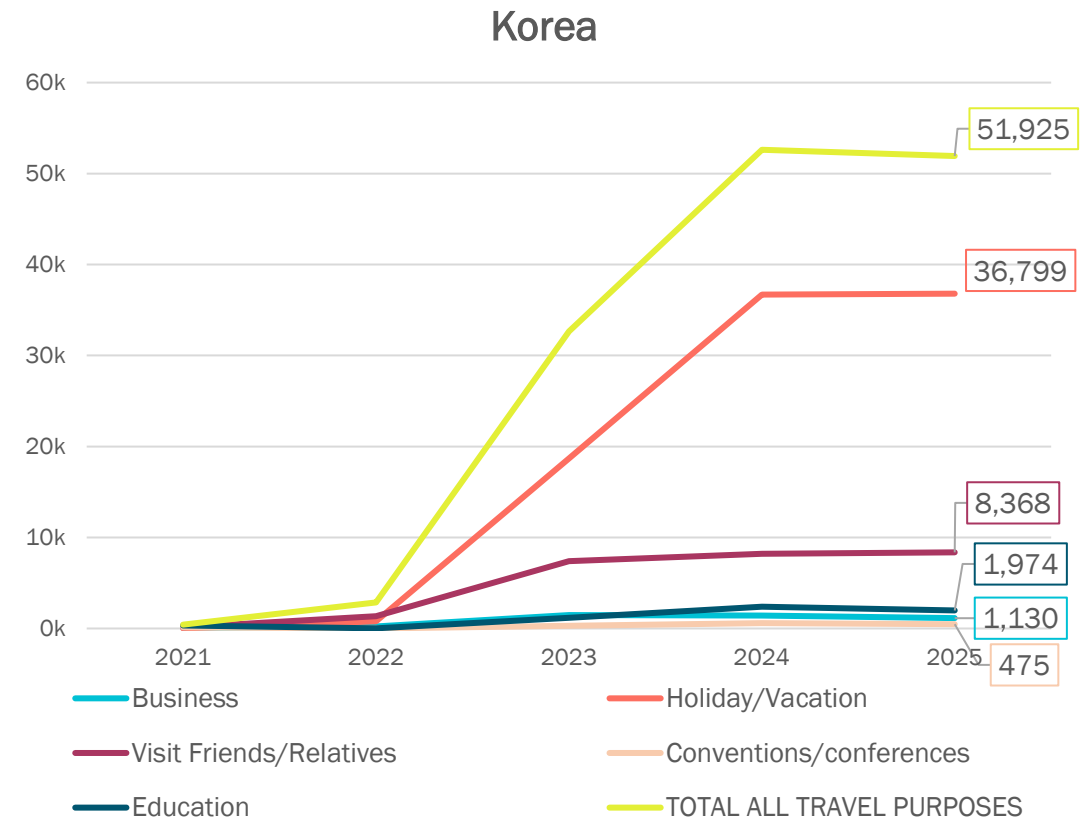
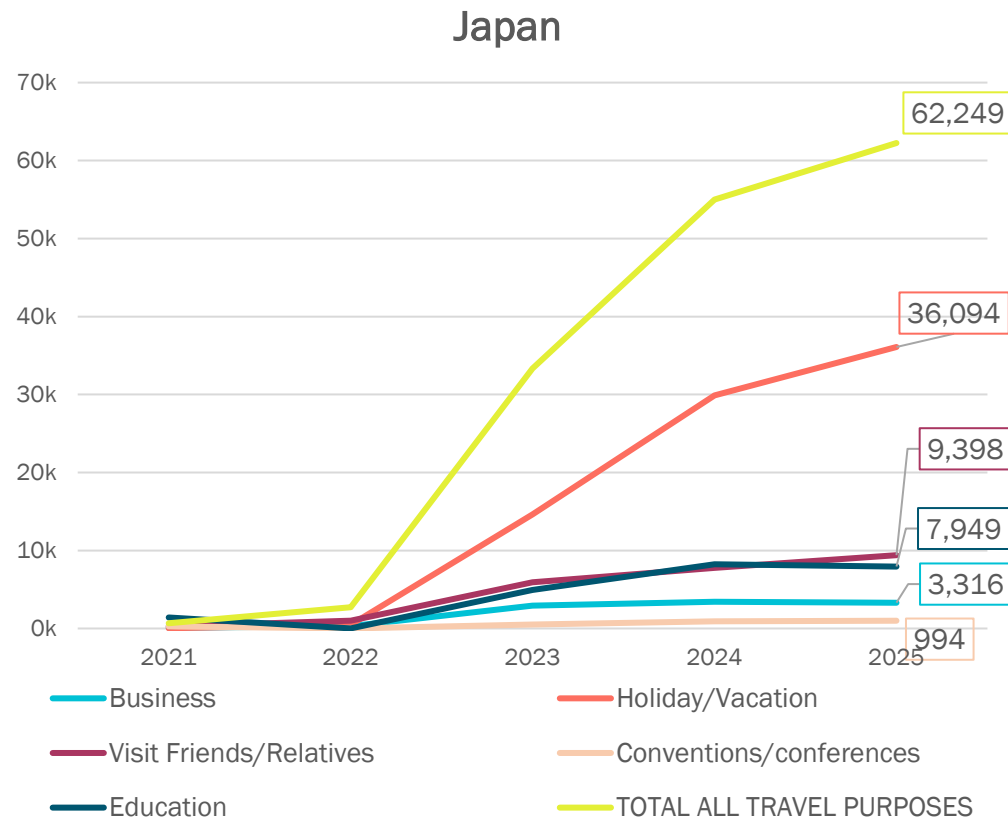


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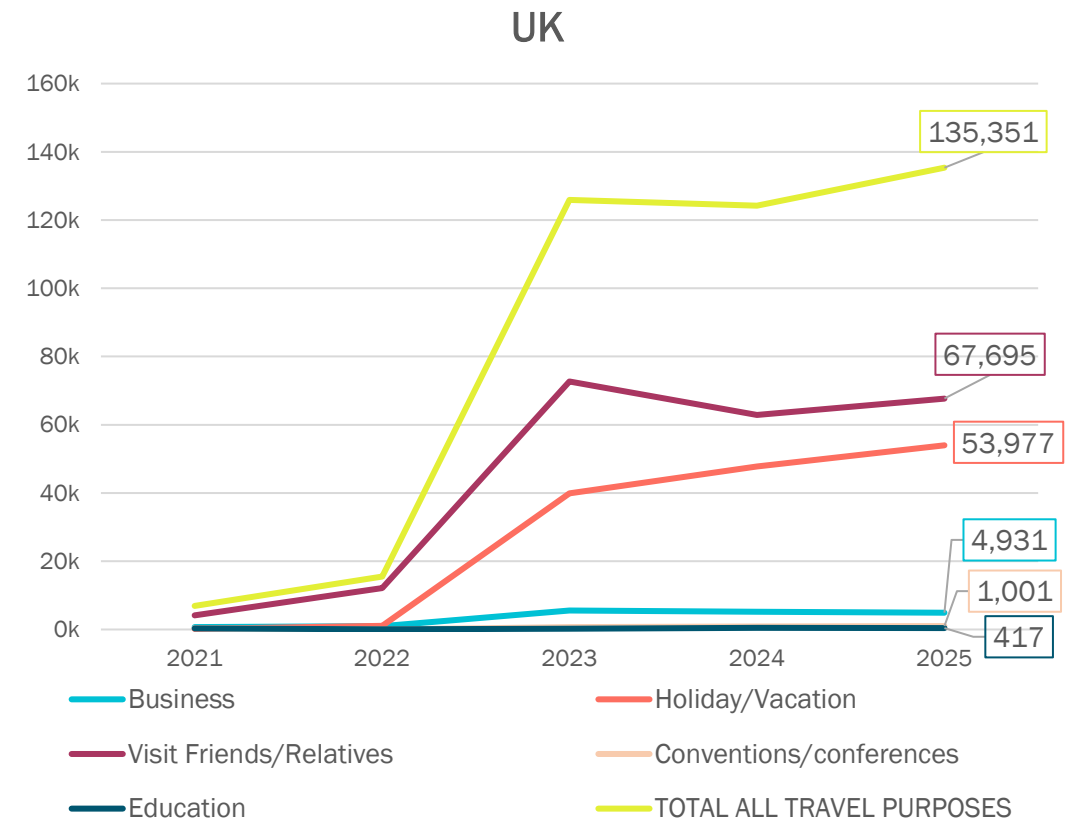
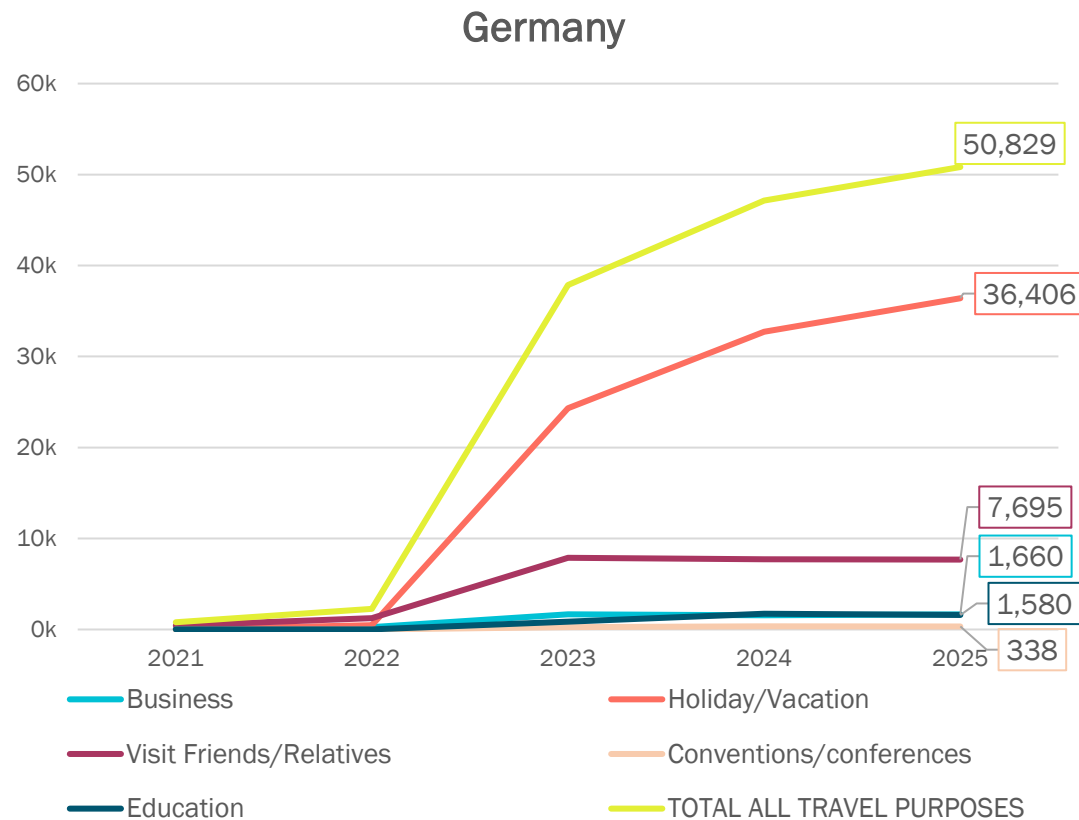
Five-year visitor arrivals to Auckland, YE July



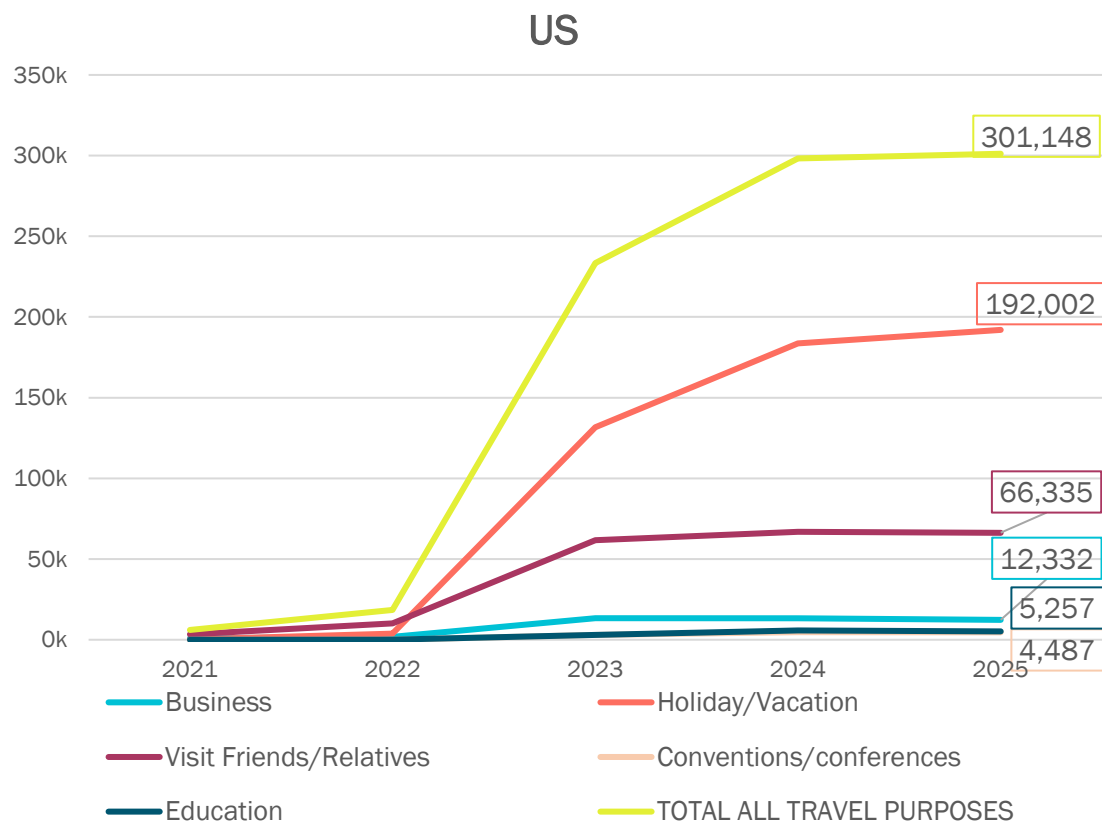
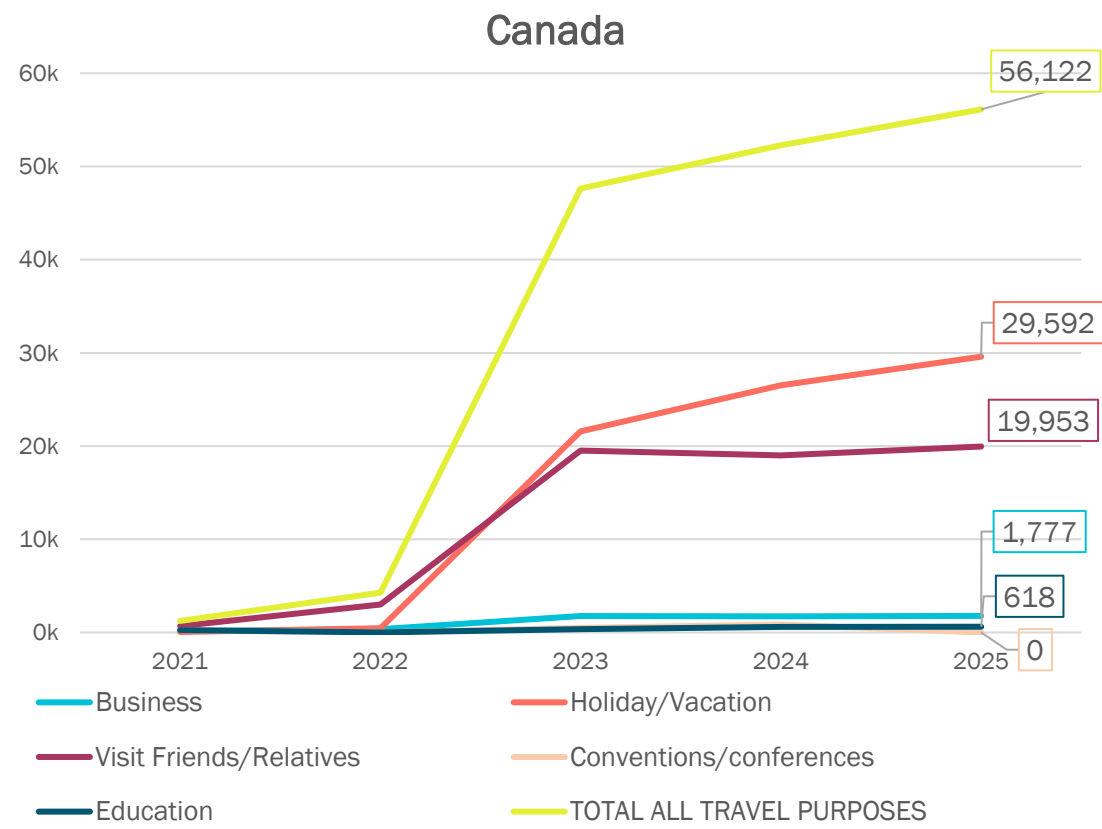
Five-year visitor arrivals to Auckland, YE July



Five-year visitor arrivals to Auckland, YE July



Five-year visitor arrivals to Auckland, YE July



Ngā mihi Thank you

- KEY CONTACT

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