

City Centre Quarterly Insights – December 2022



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Key Data

SPEND

85%

Dec. 22 quarter
of
Dec. 19 quarter



90%

Dec. 22
of
Dec. 19



21%

of spend was
international
Dec. 22 quarter



PEDESTRIAN COUNTS

Friday

Busiest day



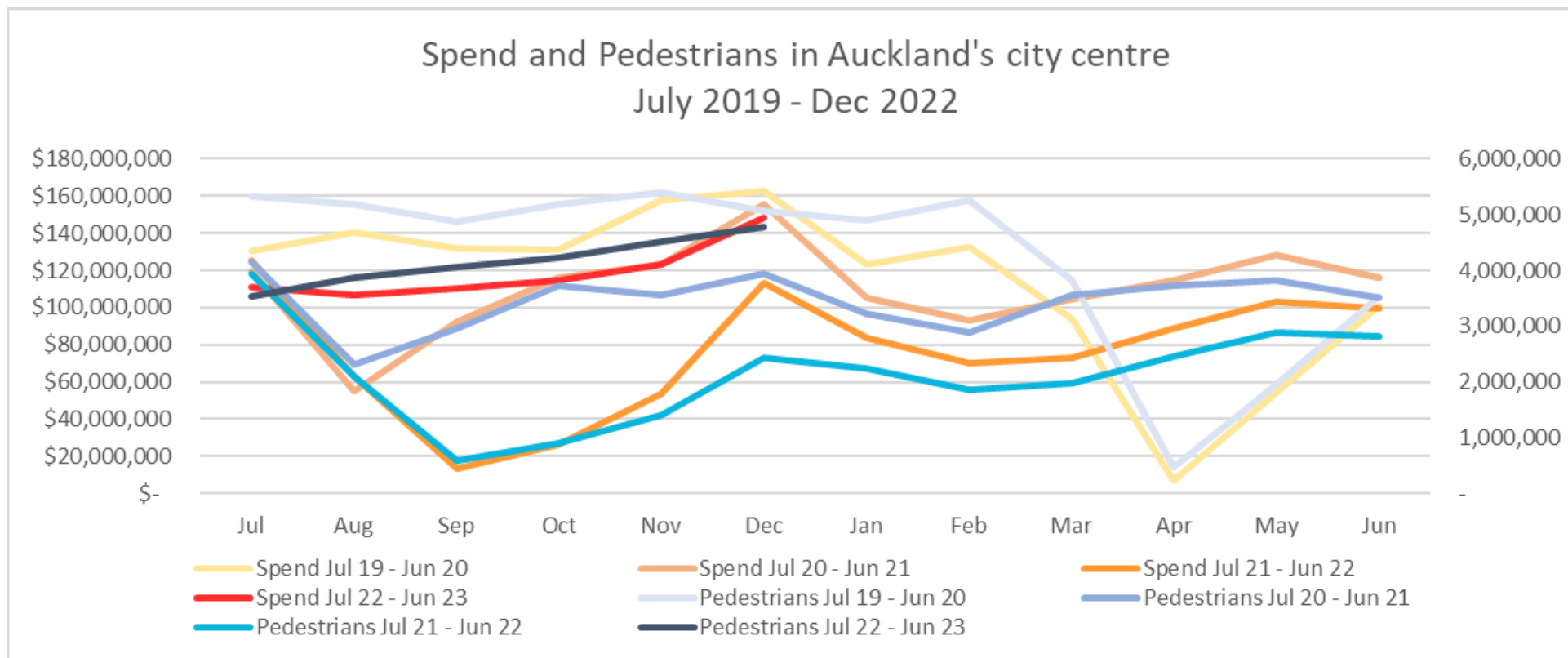
+10.5%

Dec. 22 quarter
vs.
Sept. 22 quarter



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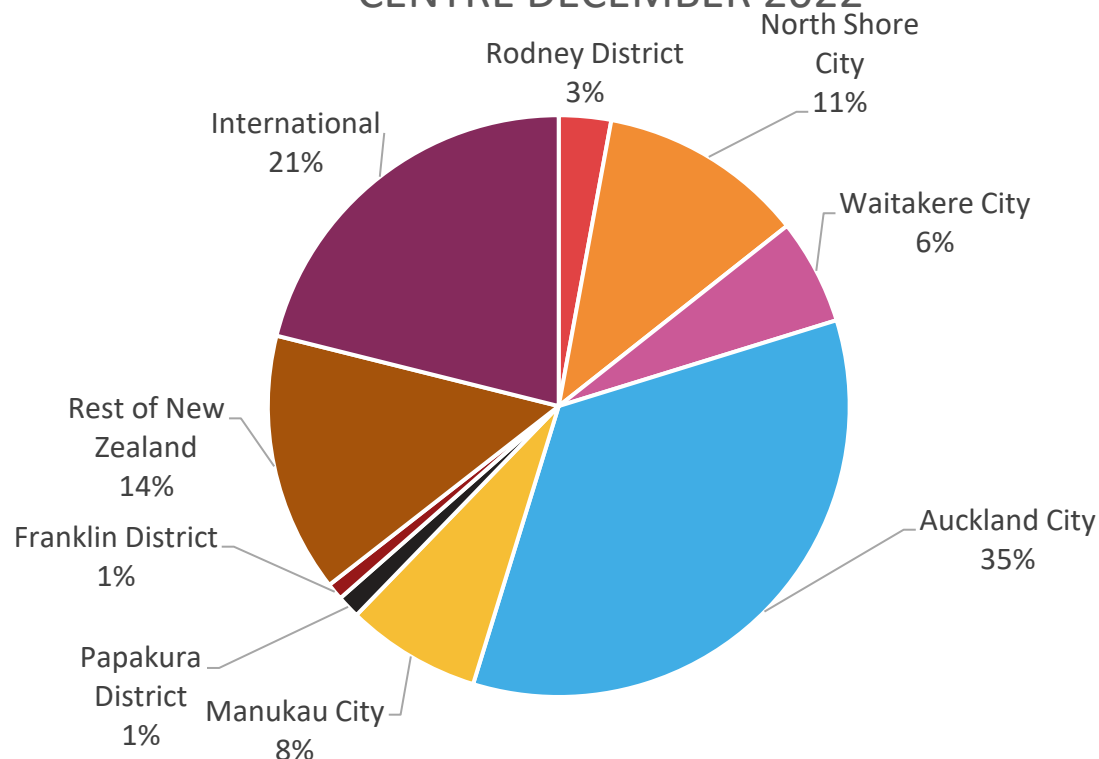
Quarterly Insights: December 2022



Source: HOTC Pedestrian Counts; Marketview Quarterly Insights.
Not for reproduction.

Quarterly Insights: Spend

ORIGIN OF SPENDING IN AUCKLAND'S CITY CENTRE DECEMBER 2022



Source: Marketview. Not for reproduction.

QUARTERLY SPEND DEC 22

vs. Dec quarter 21 (during lockdown)
HOTC +99.3%
Competitors +29.4

vs. December 19
HOTC -14.5%
Competitors +10.1%
Rest of Auckland +11.7

2022 vs 2021 SPEND

HOTC + 16.5%
Auckland region +14.7%
Nationally +10%.

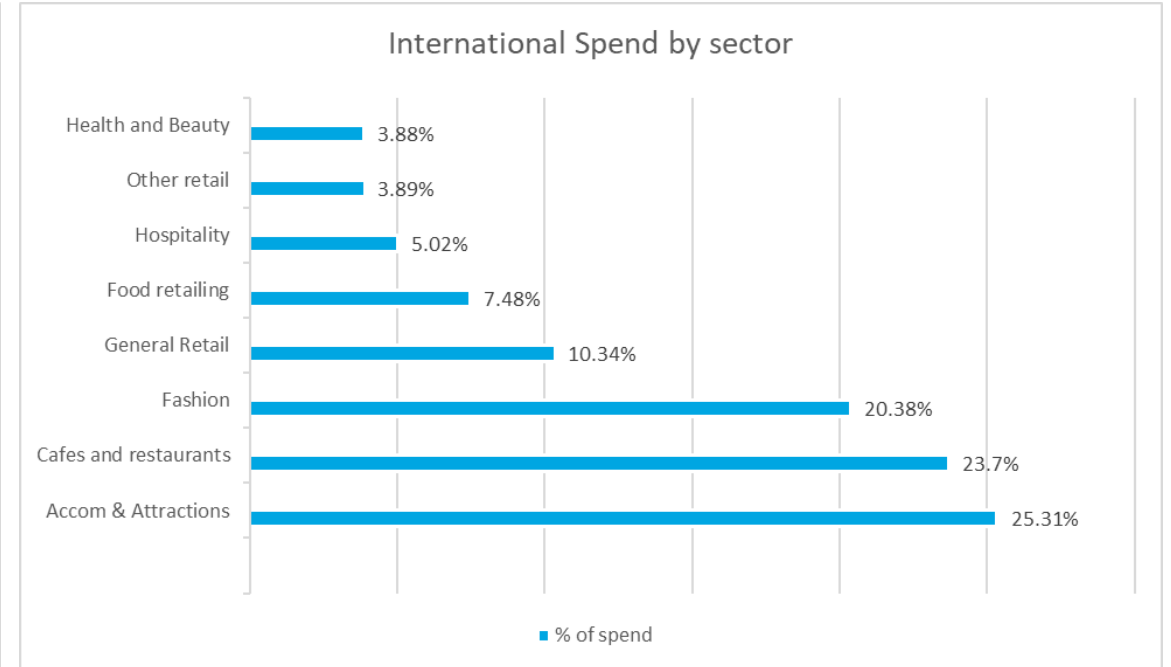
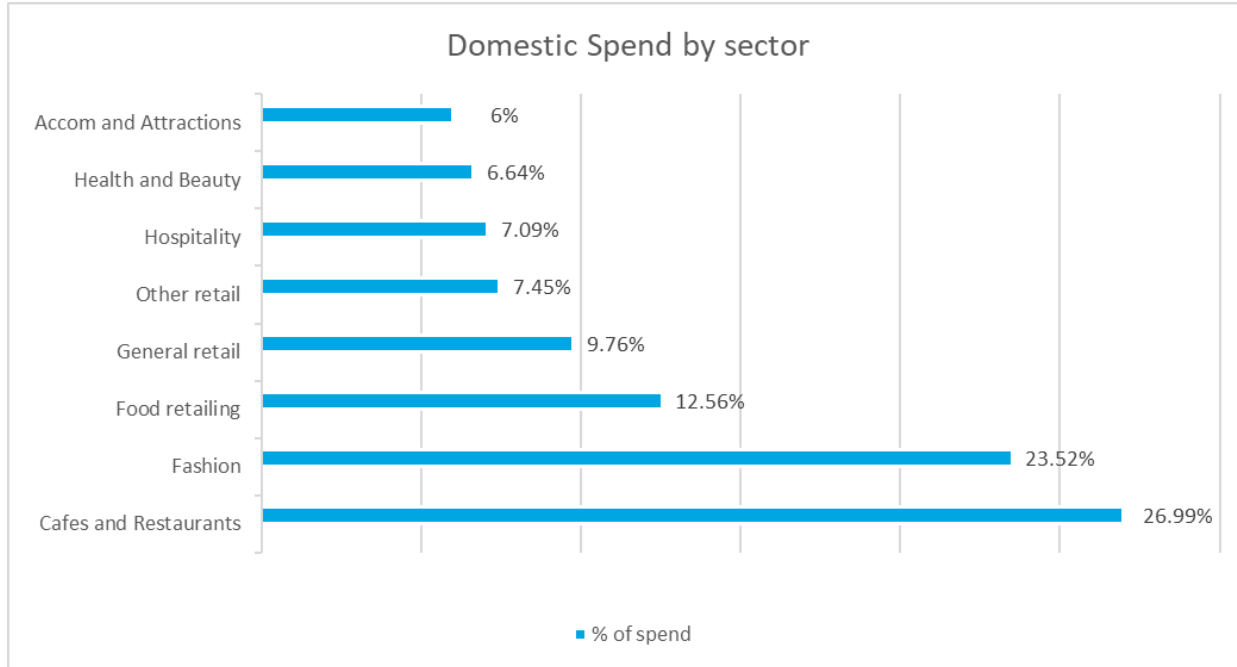
QUARTERLY TRANSACTIONS DEC 22

vs. Dec quarter 21:
Numbers: +112.9%
Average Value: -6.4%

vs. Dec quarter 19
Numbers: -29.9%
Average Value +22%



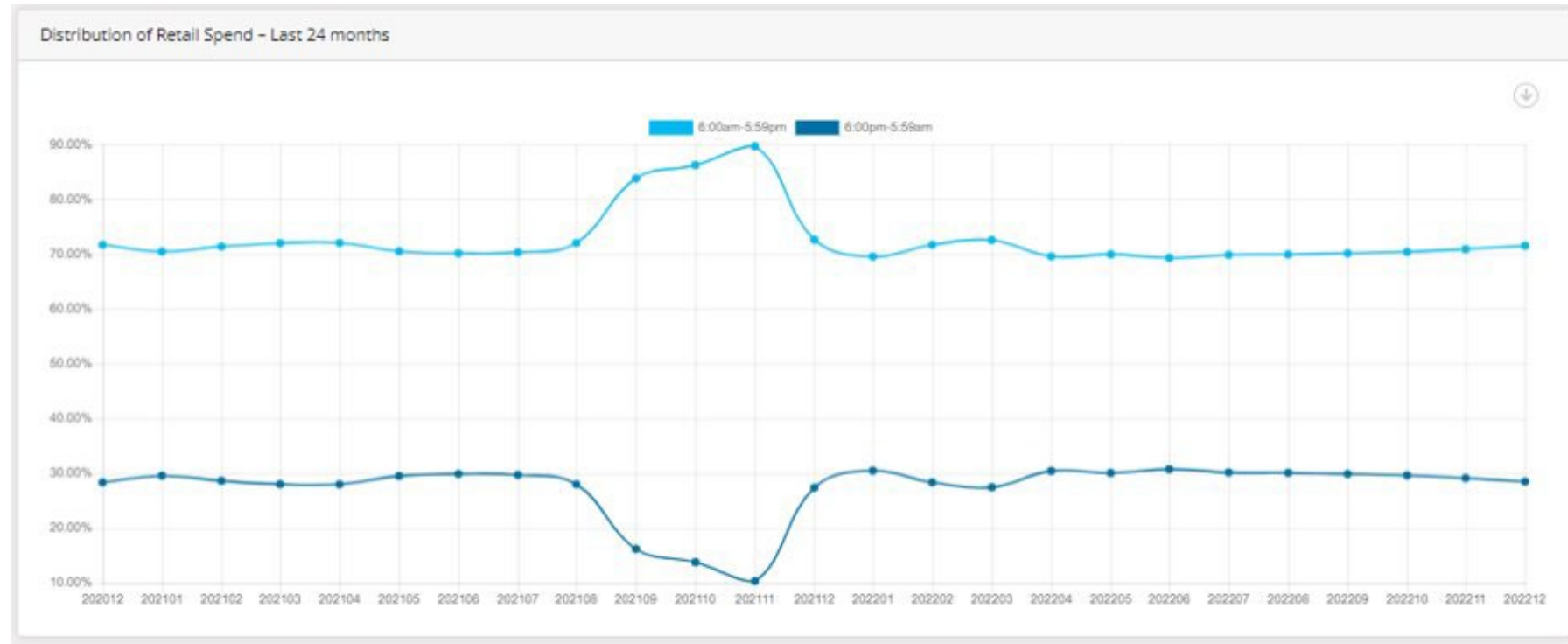
Quarterly Insights: What are people spending their money on?



The city centre's dining scene is a strong drawcard for visitors, making up 26.9% and 23.7% of domestic and international spend respectively over the December quarter. Top of the list for tourists, however, is accommodation and attractions, which accounts for 25.31% of their spend in the city centre.

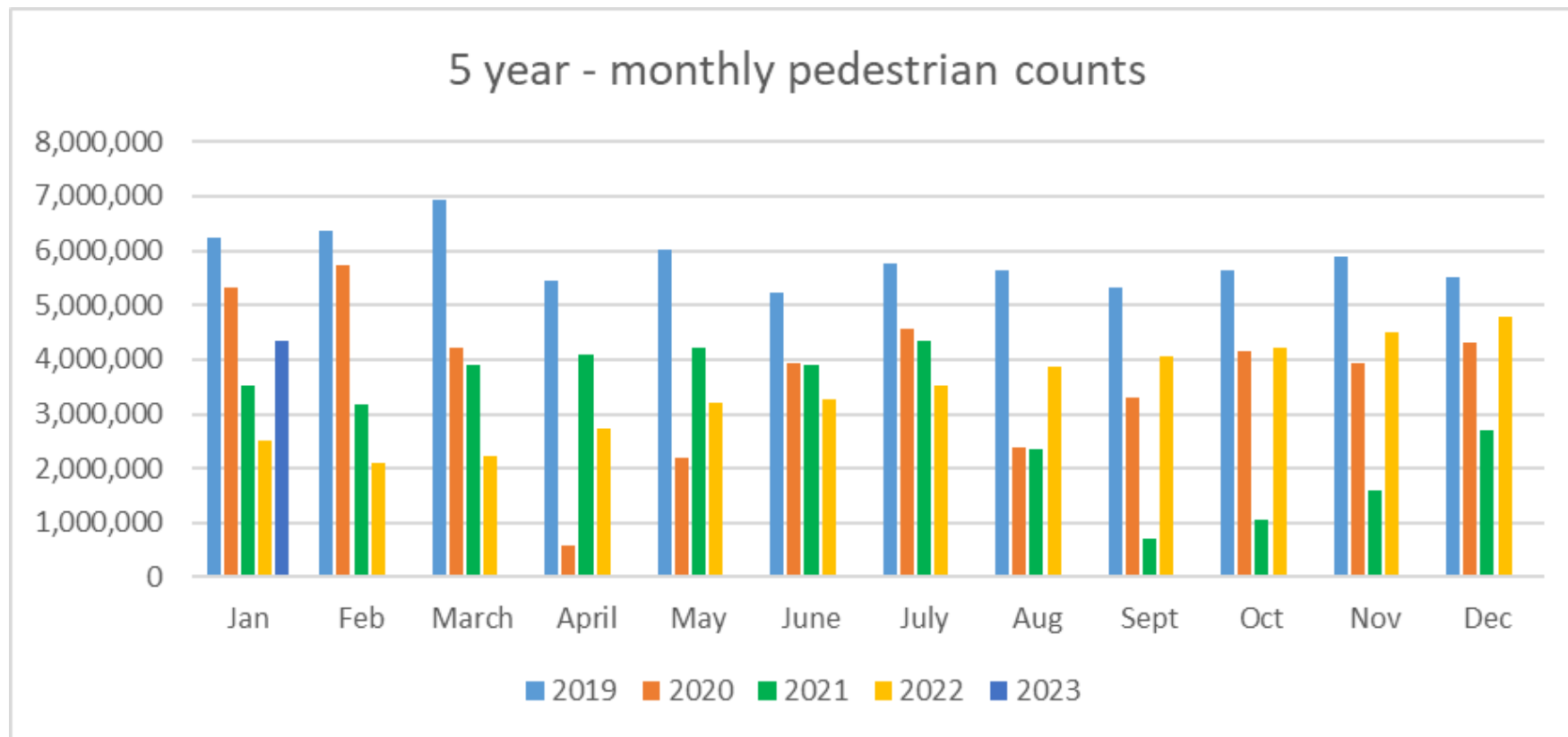
Quarterly Insights: Weekdays vs Weekends; Daytime vs Evenings

Daytime vs. Night-time: 30% of spending in the December quarter was made during the Night-time (6pm to 6am). In the December quarter, late night spend showed a +178% increase in spend vs the same quarter in 2021, representing positive demand for the night-time sector, as well observing the suppressed operating environment for late night businesses due to the lockdown in late 2021.



Weekend vs. Weekday: Weekend spend in the Dec 22 quarter vs. Dec 21 quarter increased +121.3% vs weekday spend of + 91%.

Pedestrian Counts

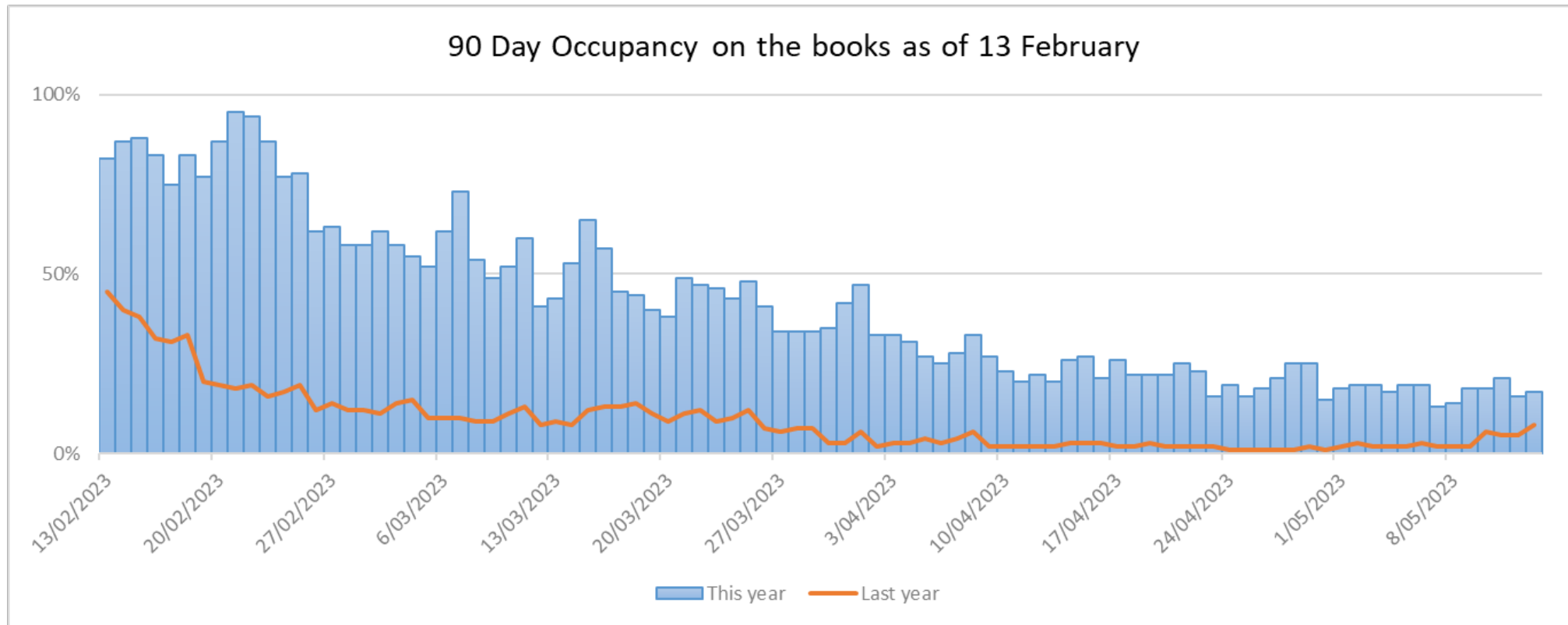


The monthly pedestrian count trend shows encouraging signs - despite January 2023 being severely impacted by weather. December 2022 saw foot traffic at 70% of December 2019. Unsurprisingly, the December quarter was up 130.9% vs the same quarter in 2021, and compared with the same quarter in 2019, the counts are just under 68%. Friday continues to be the busiest day in the city centre, followed closely by Saturday, then Thursday, Wednesday, Tuesday, Monday and Sunday.



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Accommodation Forward Bookings



There are good levels of bookings reported in response to events such as concerts at Eden Park and Mt Smart Stadium, as well as Te Matatini. We will be monitoring the impact of weather events across New Zealand and how this may impact immediate forward bookings.

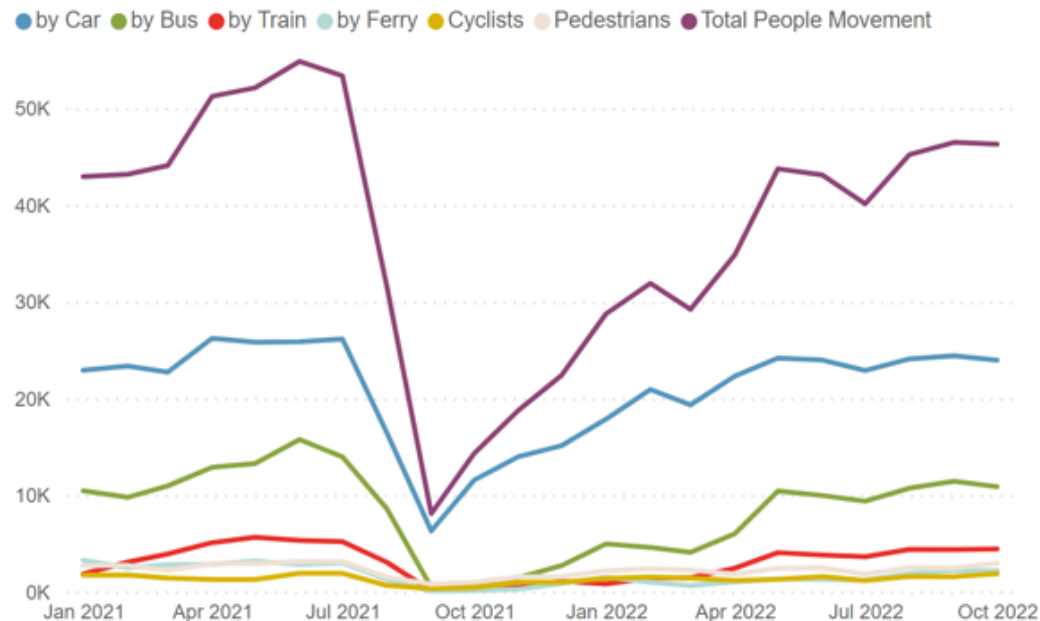
Source: STR. As of 13 February 2023. Not for reproduction.

City Centre Insights: Transport

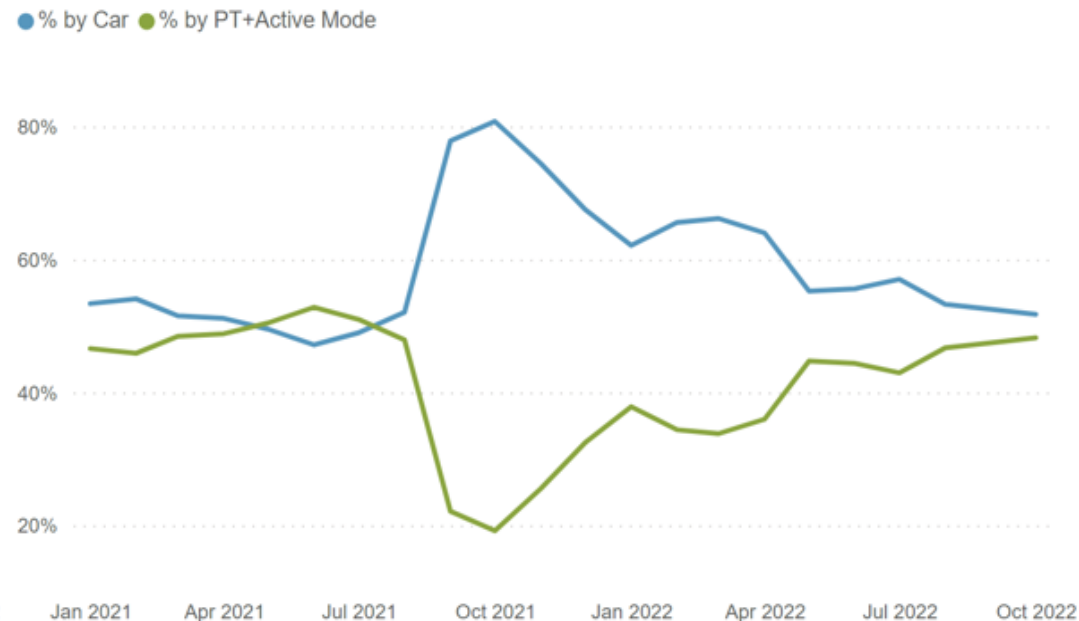


Number of People into City Centre during AM Peak Period

Number of People by Mode into City Centre



Mode Share into City Centre



Comment

In October 2022, the total number of people entering the city centre by all modes during the AM peak period was 46,324 which is similar to previous month (September).

Following the September 2021 lockdown, public transport and active mode share into the city centre has been increasing and has now reached to 48% in October 2022. Half price public transport fares and reduced covid restrictions are key contributors of this increased public transport share.

* This report now includes further refinement to people movement and mode and has been backdated accordingly.