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Key Visitor Data



401.8^k

152.6^k

606.1^k

Domestic Guest Nights April 2023 (Month) +45.6% (to April 2022)



International Visitors April 2023 (Month) +258.0% (to April 2022)



Total Guest Nights April 2023 (Month) +93.7% (to April 2022)



Domestic Tourism Transactions April 2023 (Month) +2.5% (to April 2022)

International Tourism Transactions April 2023 (Month) +227.3% (to April 2022)

Tourism Sentiment Score April 2023 (Month) +6pts (to April 2022)



Key Visitor Data





DOMESTIC

- At present, current domestic visitor numbers cannot be displayed as the MBIE Monthly Unique Regional Population Estimates are undergoing a revision. Once the revision is complete, domestic visitation reporting will commence.
- There were 401.8k domestic guest nights in commercial accommodation for the month of April, up 45.6%.
- Domestic tourism transactions for the year to April 2023 were \$2.48b, up 36.9% on last year and \$198.2m for the month (up 2.5% compared to April 2022).
- Tourism spend was up across all domestic markets.
- Waikato-based visitors spent \$45.4m in Auckland in April 2023, down 3.7% on the previous year. Spend for Northland visitors (\$18.9m) was also down (3.8%).
- Spend from the Bay of Plenty (\$16.4m, up 2.6%), Wellington (\$16.9m, up 12.1%), and Canterbury (\$15.1m, up 21.2%) was up in the month of April 2023 compared to last year.
- For domestic visitors in YE June 2022, the Net Promoter Score (NPS) was +1, (down 6 points on YE June 2021).

INTERNATIONAL

- Monthly international visitors (152.6k) were up 258.0% on the previous April but numbers were down 29.7% compared to April 2019 pre-Covid (217.0k).
- The year to April 2023 saw 1.59m international visitor arrivals, an increase of 777.8% on 2022. However, international visitation was down 42.2% compared to pre-Covid levels (2.75m in YE April 2019).
- There was strong growth for the Australian market in April 2023, with 59.4k visitors, an increase of 86.1% compared to last year. The year to April 2023 saw 656.7k Australian visitors, up 408.3%.
- VFR visitors contributed the most to annual visitor numbers (672.4k) and increased 471.7% on the year to April 2022. Monthly VFR numbers (61.0k) were also up 95.3% compared with April 2022.
- Holiday visitors (541.8k) were up 3484.1% for the year, with monthly numbers (57.2k) also up 1705.6%.
- 204.3k international guest nights in commercial accommodation for April, up 453.7% on last year.
- International tourism transactions were \$1.08b for the year, up 280.4% and \$109.5m for the month, up 227.3%.
- Monthly spend from Australia (\$18.2m) was up 67.8%.

OVERALL

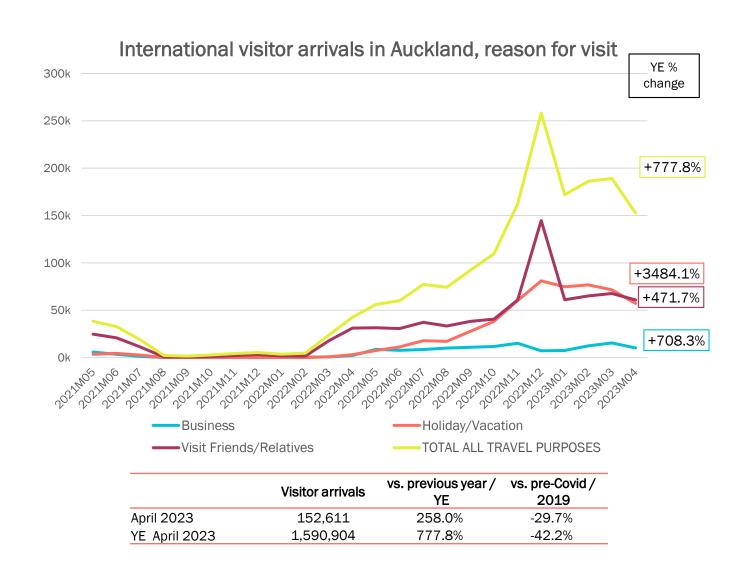
- For the month of April 2023, there were 606.1k total guest nights in commercial accommodation in Auckland, up 93.7% on last year.
- Looking forward, overall occupancy on the books is higher this year compared to the same period last year (i.e., from June 2023 to September 2023).
- Auckland occupancy peaked at 69% on Wednesday 7th June 2023.
- The **Tourism Sentiment Score** for Auckland for April 2022 was 26 (up 2 points from NZ), up 6 points to April 2022.
- The category with the highest sentiment was Relaxation and Wellness (39) followed by Food and Culinary (36) and Destination Services (32), while Safety (-1), and Culture & History (15) had the lowest sentiment.





1.59m International visitor arrivals in the year to April 2023, up 777.8%

- The month of April saw 152.6k international visitors, up 258.0% on the previous April but down 29.7% compared to pre-Covid numbers (217.0k in April 2019).
- The year to April 2023 saw 1.59m international visitor arrivals, an increase of 777.8% on the previous year. However, international visitation was down 42.2% compared to pre-Covid levels (2.75m in YE April 2019).
- VFR visitors contributed the most to annual visitor numbers (672.4k) and increased 471.7% on the year to April 2022.
 Monthly VFR numbers (61.0k) were also up 95.3% compared with the month of April 2022.
- Holiday visitors (541.8k) were up 3484.1% for the year, with monthly numbers (57.2k) also up 1705.6%.
- There were **125.8k business visitors (up 708.3%)** in the year to April 2023, **and 10.3k for the month (up 330.8%).**

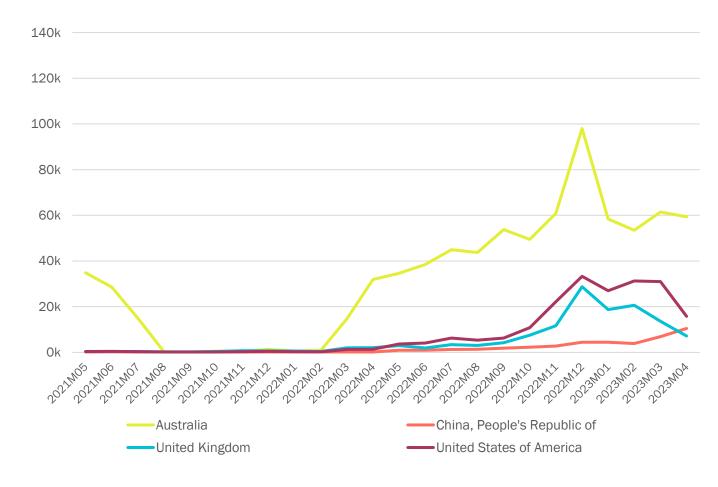




656.7k Australian visitor arrivals in YE April 2023, up 408.3%

- There was strong growth for **Australian visitors** in the month of April 2023, with 59.4k visitors, an increase of 86.1% compared to last April. The year to April 2023 saw 656.7k Australian visitor arrivals, up 408.3%.
- The year to April 2023 saw 197.1k visitors from the US (up 3407.7%), with 15.8k visitors for the month (up 1058.6%).
- For year to April 2023, there were **123.6k visitor arrivals from** the UK (up 1381.8%) and 7.1k visitors for the month (up 251.9%).
- Visitors from China (41.4k) were also up for the year (2634.9%), and up (5771.3%) for the month of April (10.5k).

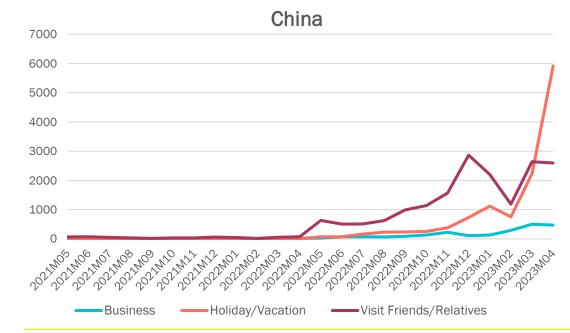
Visitor arrivals in Auckland by key international markets





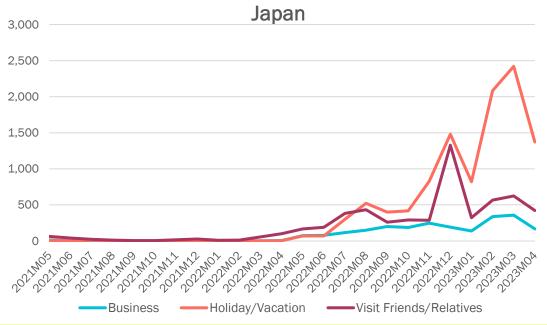


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	5,973	205.8%	16,674	495.3%	30,195	20.5%	59,359	86.1%
YE April 2023	79,871	543.3%	168,577	1162.7%	332,634	259.6%	656,674	408.3%

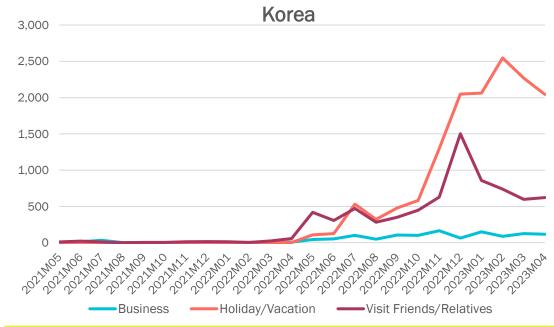


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	471	2844%	5,920	98566.7%	2,597	3409.5%	10,451	5771.3%
YE April 2023	2,193	3125.0%	12,185	18939.1%	17,465	2942.7%	41,434	2634.9%



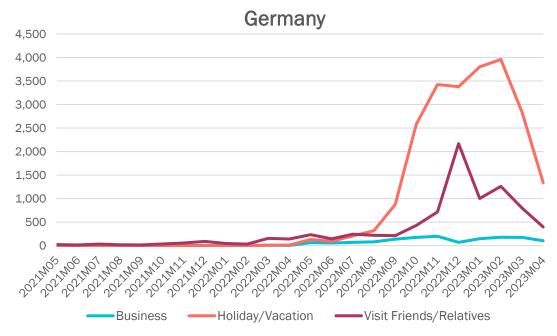


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	168	3260.0%	1,372	34200.0%	423	323.0%	2,664	2048.4%
YE April 2023	2,246	4678.7%	10,787	39851.9%	5,272	1336.5%	26,775	4461.3%



	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	118	1375.0%	2,045	68066.7%	622	991.2%	3,317	3217.0%
YE April 2023	1,168	1643.3%	14,421	102907.1%	7,221	3889.5%	26,844	7001.6%



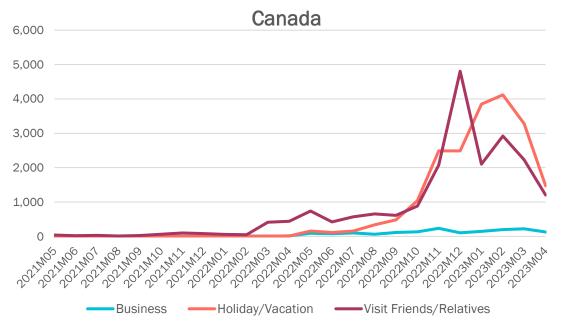


	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	104	1385.7%	1,336	11033.3%	396	176.9%	2,021	1048.3%
YE April 2023	1,470	1341.2%	22,939	63619.4%	7,838	1059.5%	35,763	3757.9%

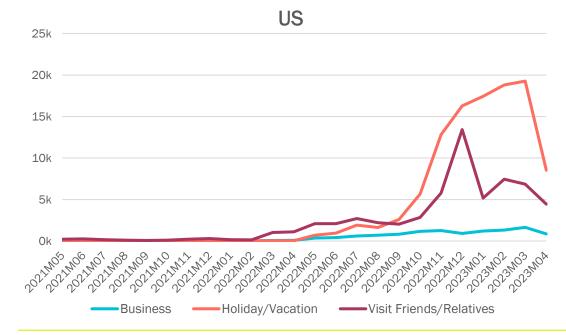
25k —	UK
20k —	
15k —	
10k —	
5k —	
Ok _	
205,705,74	
	Business Holiday/Vacation Visit Friends/Relatives

	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	327	697.6%	2,296	5118.2%	4,116	122.8%	7,143	251.9%
YE April 2023	4,979	914.1%	37,752	19260.0%	73,491	976.9%	123,565	1381.8%





	Business	vs. previous Holiday year	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	128	573.7% 1,473	13290.9%	1,205	173.2%	3,082	512.7%
YE April 2023	1,618	1164.1% 19,977	36894.4%	19,216	1320.3%	45,143	2487.0%



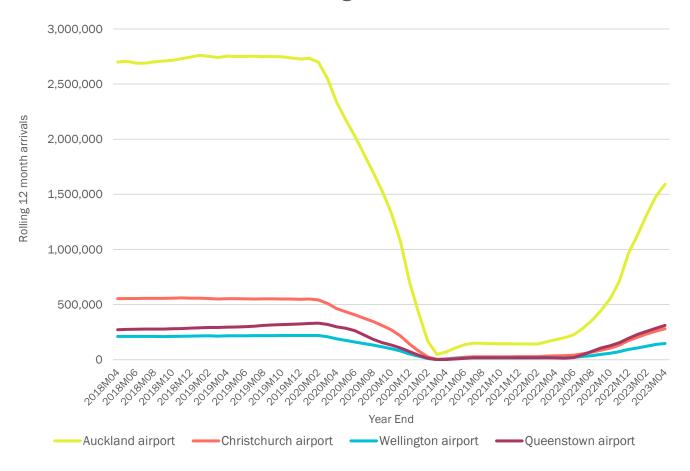
	Business	vs. previous year	Holiday	vs. previous year	VFR	vs. previous year	Total	vs. previous year
April 2023	869	910.5%	8,525	21759.0%	4,446	302.7%	15,803	1058.6%
YE April 2023	11,322	1929.0%	106,623	59800.6%	57,093	1363.9%	197,060	3407.7%



Auckland has seen a 777.8% increase in international visitor arrivals over the last year

- In the five years proceeding 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.
- However, with NZ borders fully open (since July 2022), Auckland has seen a 777.8% increase in international visitor arrivals over the last year.
- For the year ending April 2023, all other ports saw growth in international visitor arrivals in comparison to last year. Queenstown saw an increase of 1809.8%, Christchurch was up 711.0 % and Wellington was up 735.1% compared to last year.

12 month rolling visitor arrivals



Domestic Visitor Data Update

- At present, current domestic visitor numbers cannot be displayed as the MBIE Monthly Unique Regional Population Estimates are undergoing a revision.
- Once the revision is complete, we will commence reporting on domestic visitation.



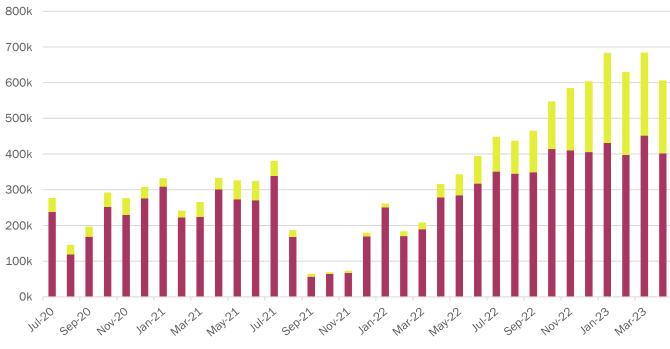




204.3k international guest nights in commercial accommodation in April 2023, up 453.7%

- For the month of April 2023, there were **606.1k total guest nights** in **commercial accommodation in Auckland, up 93.7%** on the same month last year.
- There were 401.8k domestic guest nights in commercial accommodation (up 45.6%), and 204.3k international guest nights (up 453.7%) in commercial accommodation in April 2023.
- For New Zealand overall, there were 3.42m guest nights in commercial accommodation, up 38.9% compared to April 2022.

Guest nights in commercial accommodation - Auckland



■ Domestic guest nights ■ International guest nights

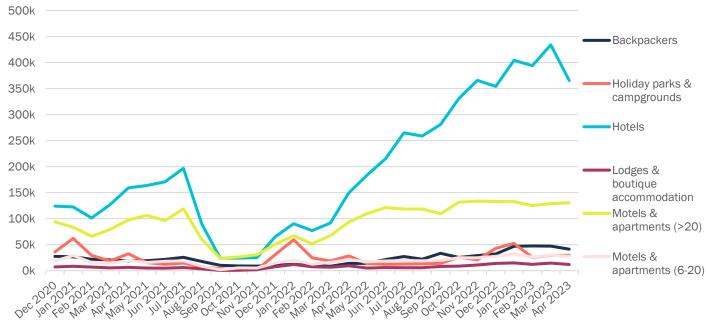
April 2023	Auckland	% change	New Zealand	% change
Total guest nights	606,100	93.7%	3,422,900	38.9%
Domestic guest nights	401,800	45.6%	2,404,600	2.7%
International guest nights	204,300	453.7%	1,018,300	731.3%



365.5k guest nights in hotels in April 2023, up 145.0%

- For the month of April 2023, there were 365.5k guest nights in hotels in Auckland, up 145.0% compared to April last year.
- There were 130.5k guest nights in motels and apartments (>20) (up 39.9%), and 27.5k guest nights in motels and apartments (6-20) (up 28.5%) in April 2023.
- Guest nights in backpacker accommodation were up (193.6%) to 41.4k.
- Guest nights in holiday parks and campgrounds (up 2.4% to 29.3k) and lodges and boutique accommodation (up 25.5% to 11.8k) also increased.

Guest nights by accommodation type (monthly)



April 2023	Guest nights	% change
Hotels	365,500	145.0%
Motels & apartments (>20)	130,500	39.9%
Motels & apartments (6-20)	27,500	28.5%
Backpackers	41,400	193.6%
Holiday parks & campgrounds	29,300	2.4%
Lodges & boutique accommodation	11,800	25.5%



Occupancy was 40.5% higher in April 2023, compared to 2022

- Occupancy was 40.5% higher during the month of April 2023, compared to April 2022.
- Revenue per available room (RevPAR) was 60.6% higher in April 2023 compared to last year.
- Average Daily Rate (ADR) was also up (14.7%) on last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in April 2023. ADR peaked on Saturday 1st April, while RevPAR peaked on Monday 3rd April and Occupancy peaked on Tuesday 18th April 2023.
- A guarter (26%) of the hotels covered here were isolation hotels this time last year.

Percent Changes for the Month of April



5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30

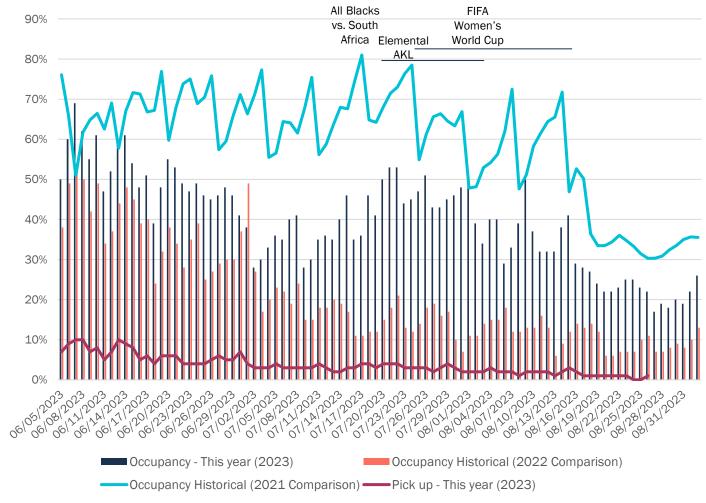
Occupancy — ADR — RevPAR



90 Day Forward Booking Occupancy Data

- Looking forward (over the next three months), overall occupancy on the books is higher for the period from June to September 2023 (compared to the same period in 2022) apart from the 1st July 2023 (38%).
- Over the next 12 months (from June 2023 to May 2024), occupancy is generally higher compared to the previous year.
- Auckland occupancy peaked at 69% on Wednesday 7th June 2023.

Occupancy - 90 Day Forward Outlook





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.
- Once an alternative dataset becomes available, we will commence reporting on this.





\$2.48b in Domestic tourism transactions for **YE April 2023, up 36.9%**

- In the year to April 2023, Domestic tourism transactions were \$2.48b (up 36.9%), while International tourism transactions were \$1.08b, up 280.4% for the year.
- Looking at the last 24 months, domestic tourism transactions fell 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 October in 2021.
- 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.

Year-end tourism transactions in Auckland



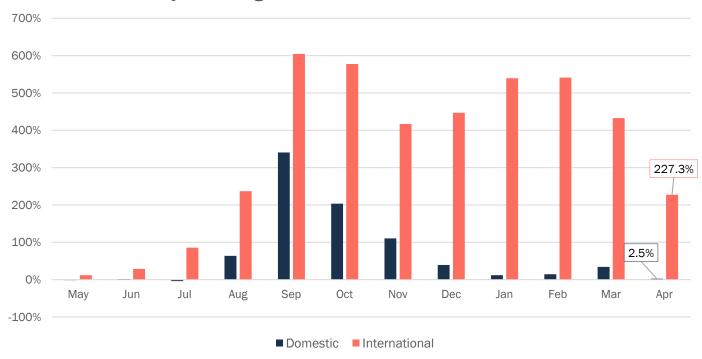
Tourism Transactions	YE April 2023 (\$b)	% change		
Domestic	2.484	36.9%		
International	1.079	280.4%		



International tourism transactions were \$109.5m for April 2023, up 227.3%

- For the month of April 2023, domestic tourism transactions (TECTs) were \$198.2m, up 2.5% compared with the same month in 2022.
- International tourism transactions in April 2023 were \$109.5m (up 227.3%) compared to April 2022.

Monthly % Change in tourism transactions in Auckland



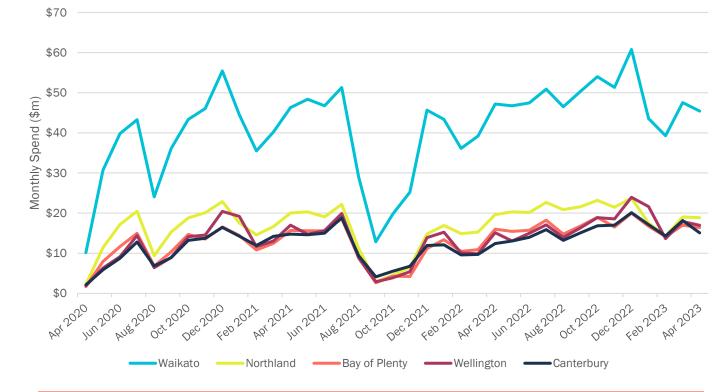
Tourism Transactions	April 2023 (\$m)	% change
Domestic	198.2	2.5%
International	109.5	227.3%



Wellington visitors spent \$16.9m in April 2023, up 12.1% on the previous year

- Tourism spend was up across all key domestic markets.
- For the month of April 2023, tourism spend for **Waikato-based visitors \$45.4m** was **down 3.7%** on the previous year.
- Spend from Northland (\$18.9m) was also down (3.8%).
- In contrast, spend from the Bay of Plenty (\$16.4m, up 2.6%), Wellington (\$16.9m, up 12.1%), and Canterbury (\$15.1m, up 21.2%) was up in the month of April 2023 compared to April 2022.

Monthly tourism domestic spend in Auckland, by market



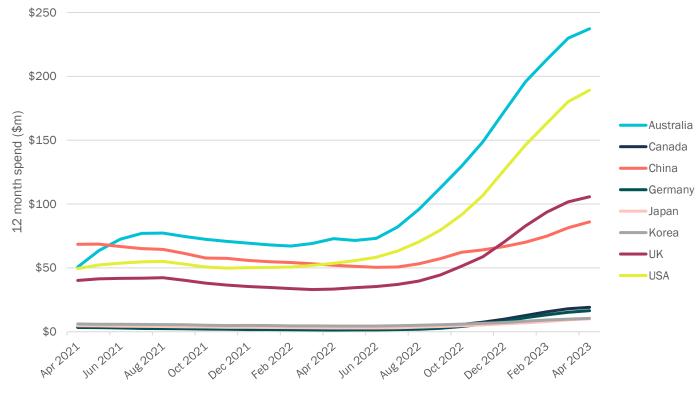
	Waikato	vs. previous year	Northland	vs. previous year	Bay of Plenty	vs. previous year	Wellington	vs. previous year	Canterbury	vs. previous year
April 2023	45.4	-3.7%	18.9	-3.8%	16.4	2.6%	16.9	12.1%	15.1	21.2%



Australian visitors spent \$237m in the year to April 2023, up 225.5% on the previous year

- In the year to April 2023, Australian tourism spend was up 225.5% on the previous year to \$237m.
- Tourism spend from the US (up 252.8% to \$189m) and the UK (up 216.2% to \$106m) was up for the year to April 2023.
- Chinese visitors spent \$86m in the year to April 2023, up
 65.3% on the previous year.
- Spend from Germany (up 1138.3% to \$16m), Canada (up 463.9% to \$19.1m), Japan (up 236.9% to \$10.1m) and Korea was also up (134.1% to \$10.4m) on the previous year.

Year-end tourism international spend in Auckland, by market



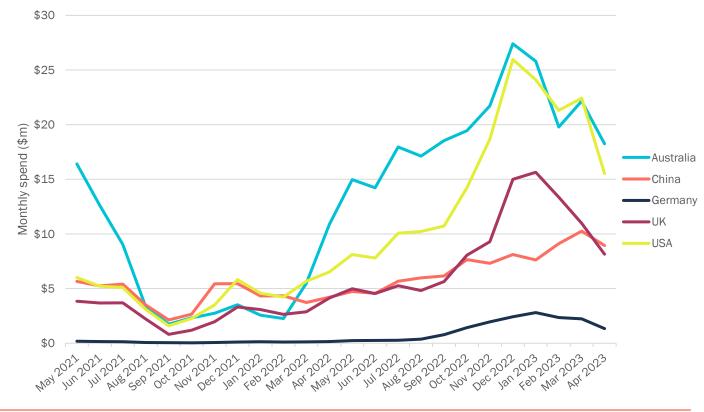
	Australia (\$m)	vs. previous year	China (\$m)	vs. previous year	UK (\$m)	vs. previous year	US (\$m)	vs. previous year	Germany (\$m)	vs. previous year
YE April 2023	237	225.5%	86	65.3%	106	216.2%	189	252.8%	16	1138.3%



Australian visitors spent \$18.2m in April 2023, up 67.8% on the previous year

- For the month of April 2023, spend from Australia (\$18.2m) was up 67.8% compared to last April.
- Spend from the US (\$15.5m) was up 137.9% this April.
- Spend from the UK (\$8.1m) was also up (96.7%) for the month of April.
- There were increases in tourism spend from the Chinese (up 112.7% to \$8.9m), and German (up 767.1% to \$1.3m) markets for the month of April 2023.

Monthly tourism expenditure in Auckland, by market



	Australia (\$m)	vs. previous year	China (\$m)	vs. previous year	UK (\$m)	vs. previous year	US (\$m)	vs. previous year	Germany (\$m)	vs. previous year
April 2023	18.2	67.8%	8.9	112.7%	8.1	96.7%	15.5	137.9%	1.3	767.1%

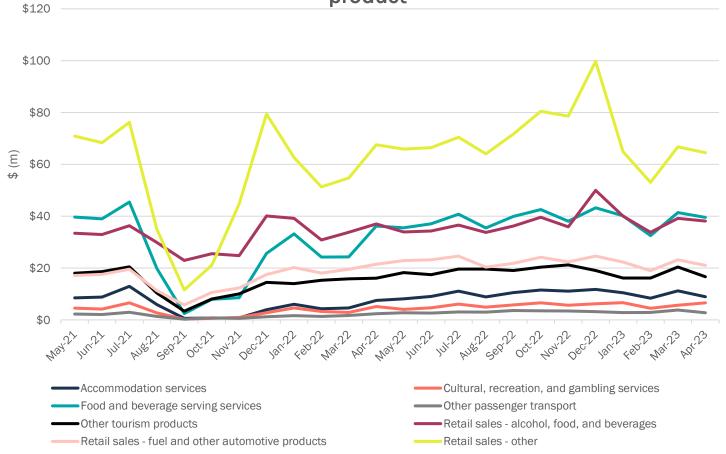


\$39.6m spent in Food & beverage by domestic visitors in April 2023, up 9.3%

	Spend (\$m)	% change
Accommodation services	8.9	18.8%
Cultural, recreation, and gambling services	6.6	27.4%
Food and beverage serving services	39.6	9.3%
Other passenger transport	2.8	17.8%
Other tourism products	16.6	3.2%
Retail sales - alcohol, food, and beverages	38.1	3.0%
Retail sales - fuel and other automotive products	21.1	-1.8%
Retail sales - other	64.5	-4.6%
Grand Total	198.2	2.5%

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Domestic monthly tourism transactions in Auckland, by product



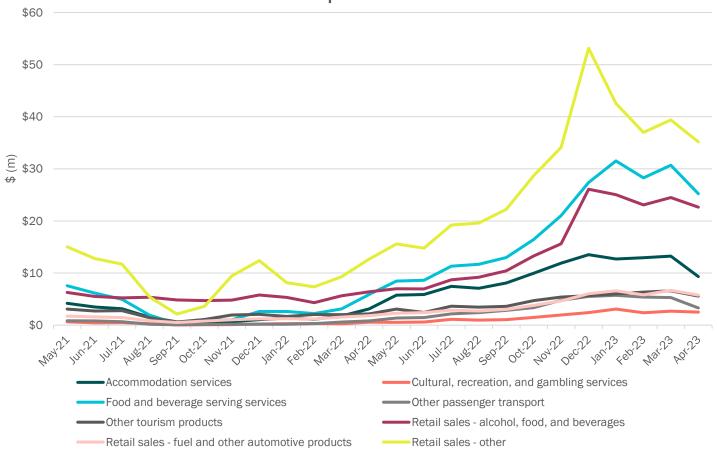


\$35.2m spent in Retail sales (other) by International visitors in April 2023 up 177.7%

	Spend (\$m)	% change
Accommodation services	9.3	198.1%
Cultural, recreation, and gambling services	2.5	340.1%
Food and beverage serving services	25.2	328.7%
Other passenger transport	3.3	302.3%
Other tourism products	5.6	158.6%
Retail sales - alcohol, food, and beverages	22.6	253.5%
Retail sales - fuel and other automotive products	5.7	214.5%
Retail sales - other	35.2	177.7%
Grand Total	109.5	227.3%

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International monthly tourism transactions in Auckland, by product







Major Events Insights



Event	Date	Venue	Interesting Findings
Synthony in the Domain	1 April 2023	Auckland Domain	The month of April 2023 saw 152.6k international visitors, up 258.0%.
			■ For the month of April 2023, there were 606.1k total guest nights in commercial accommodation in Auckland, up 93.7% on last year.
Run Riot (HER Festival)	2-3 April 2023	Silo Park	■ For the month of April 2023, domestic tourism transactions (TECTs) were \$198.2m, up 2.5% compared with the same month in 2022.
			 International tourism transactions in April 2023 were \$109.5m (up 227.3%) compared to April 2022.
Vegan Food Festival	23 April 2023	Victoria Park	



Events Insights Q1 Mar 2023



367

Business events in Auckland



25%

Auckland's market share of business events



72.3^k

Delegates hosted in Auckland



36%

Auckland's market share of delegates



105.2^k

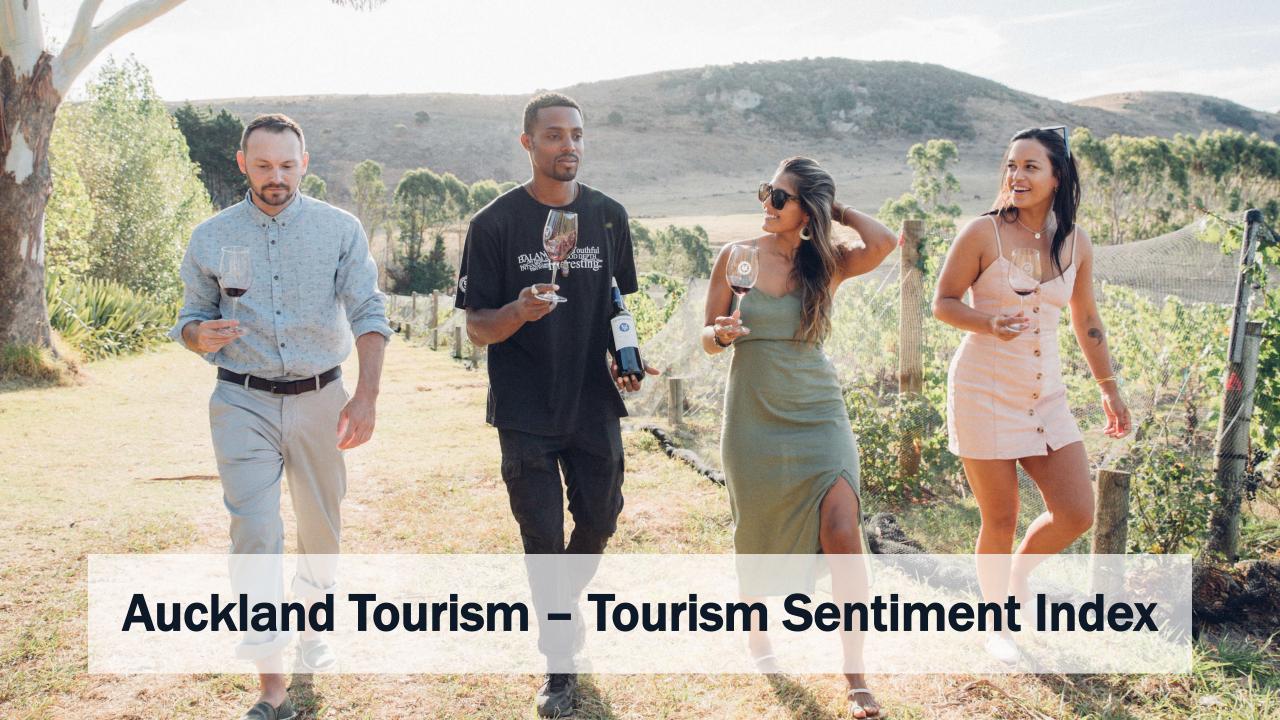
Delegate days hosted in Auckland



34%

Auckland's market share of delegate days





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 imagebased 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, TumbIr 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 April 2023 was +26 (+2 points up from NZ), up 6 points to April 2022.
- Of all conversations online being driven by Auckland's tourism experience or products, 29% of those conversations were identified as destination promoters.
- This includes 2.278 online conversations about Auckland, while 24,109 online conversations were included for NZ.
- 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.
- Topics that drove positive sentiment for Auckland were 'Restaurant, Dining, and Takeaway' and 'Beaches', while negative sentiment was driven by 'Biking & Cycling' and 'Natural Disaster'.



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 April 2023 were Access and Transportation (33%) and Amenities and Entertainment (17%) and Outdoor Activities (13%).
- The category with the highest sentiment was Relaxation and Wellness (39) followed by Food and Culinary (36) and Destination Services (32), while Safety (-1), and Culture & History (15) had the lowest sentiment.
- Sub-categories that drove positive sentiment were Restaurant, Dining and Takeaway (92), Winery and Vineyards (51), Weddings (47), surfing (44) and Beaches (43).
- The lowest sentiment was recorded in Natural Disaster (-1), Museum and Galleries (1), and Shopping (5).
- Joy was the general emotional tone for most categories for the month of April 2023, while Anger was linked to Access and Transportation and Fear associated with Safety.

	AUCKLAND			NEW ZEALAND			
CATEGORIES	Volume	Emotion	Sentiment	Volume	Emotion	Sentiment	
▲ Access + Transportation	33% ~ 0%	Anger	17 Average	20% - 1%	Anger	15 Average	
▲ Amenities + Entertainment	17% ~ 3%	Joy	22 Average	15% ^ 2%	Joy	23 Average	
▲ Outdoor Activities	13% - 5%	Joy	23 Average	20% • 0%	Joy	27 Average	
▲ Relaxation + Wellness	11% ~ 5%	Joy	39 High	8% <u>~</u> 1%	Joy	31 Average	
▲ Food + Culinary	11% • 4%	Joy	<mark>36</mark> High	12% • 3%	Joy	34 High	
▲ Safety	6% ▼ 6%	Fear	-1 Average	12% ▼ 3%	Fear	- <mark>6</mark> Average	
▲ Culture + History	6% ~ 2%	Joy	15 Average	7 % ~ 3%	Joy	15 Average	
▲ Destination Services	4% ▼ 3%	Joy	32 Average	6% • 1%	Joy	28 Average	

Tourism Sentiment Index Score Trends





- The Tourism Sentiment Index (TSI) Score trend line for Auckland has fluctuated from 1st May 2022 to 30th April 2023.
- Auckland's TSI fell in June-July 2022. It rose again in August and held steady until November 2022.
- Auckland TSI declined in December 2022 through to January 2023. TSI stabilised in February and shot up in March and April 2023.







Visitor Experience



aucklandnz.com

30%

Promoters Net Promoter Score YE June 2022 -3



NPS

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



Detractors Net Promoter Score YE June 2022 -3

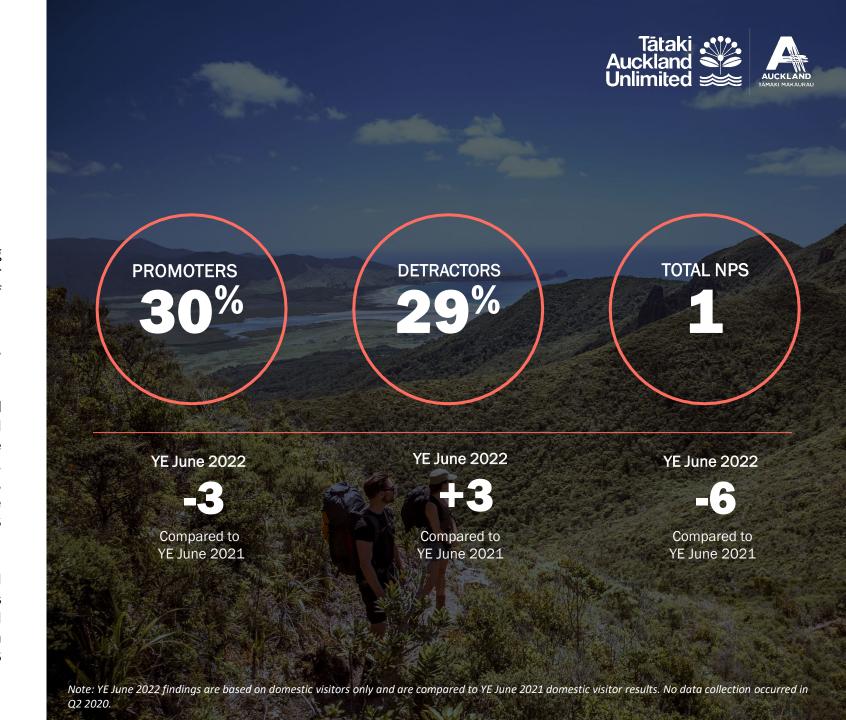


Total Satisfaction Overall experience in Auckland YE June 2022 -0.1



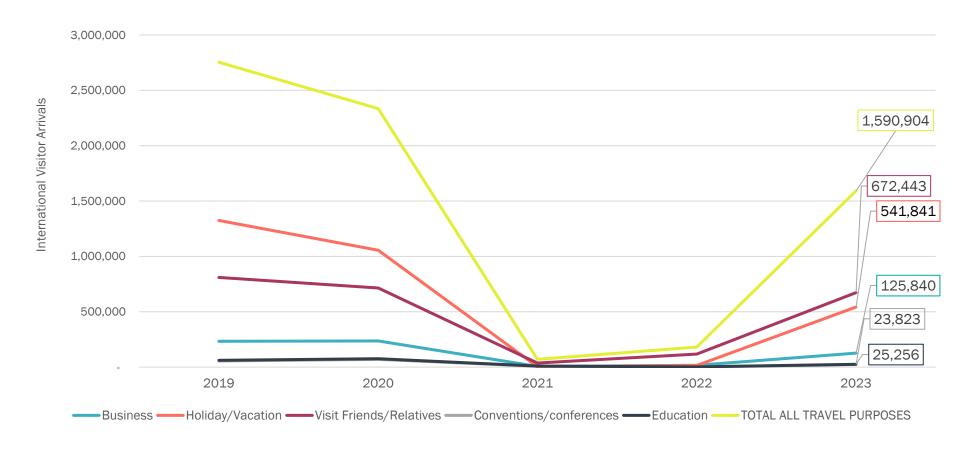
Net Promoter Score

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

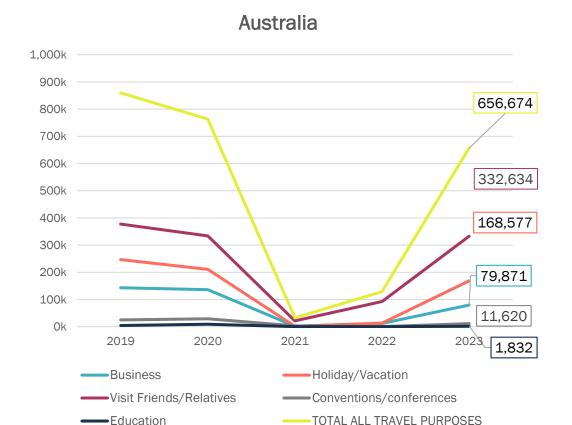


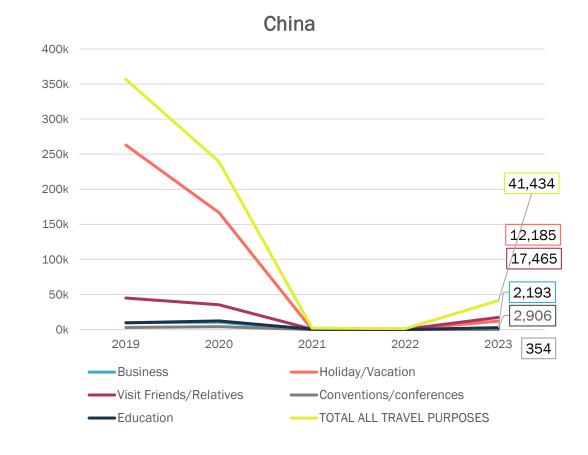




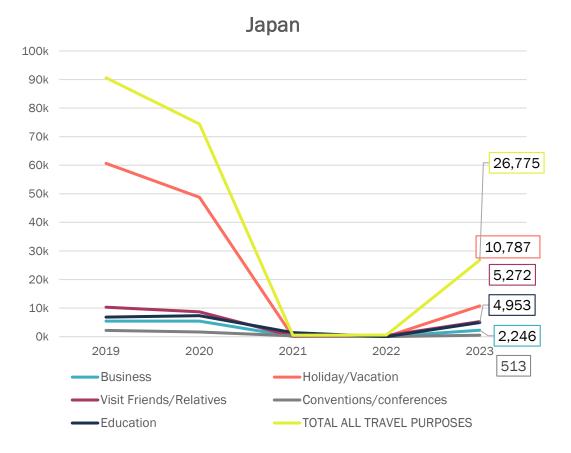


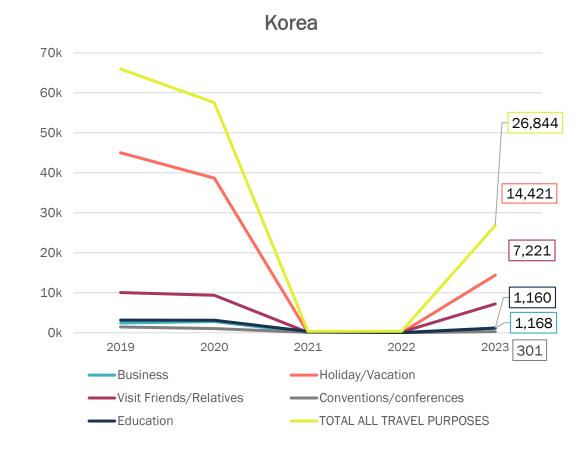




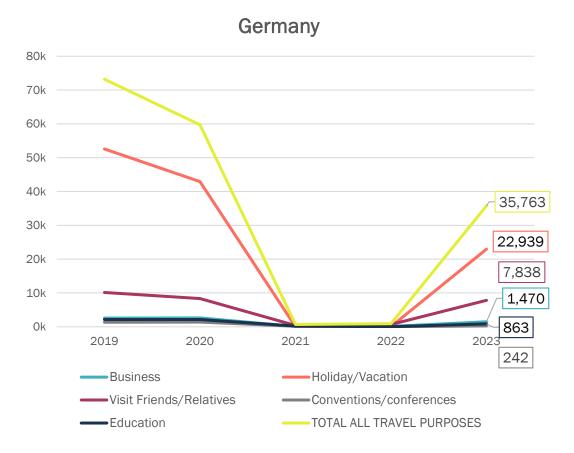


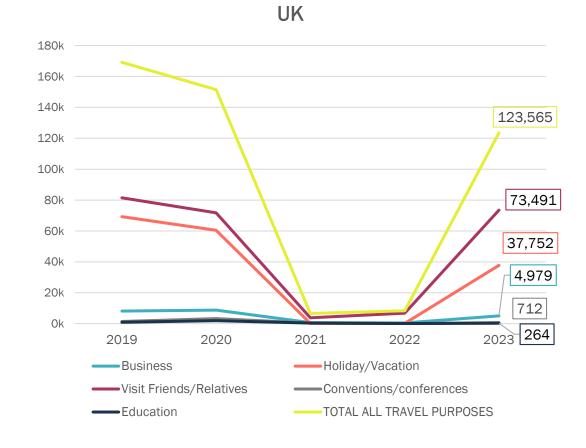




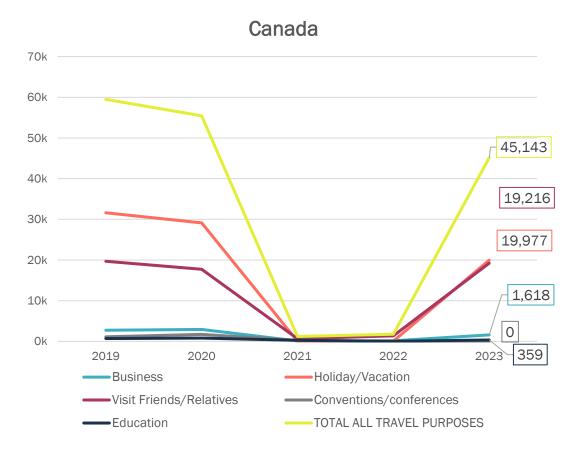


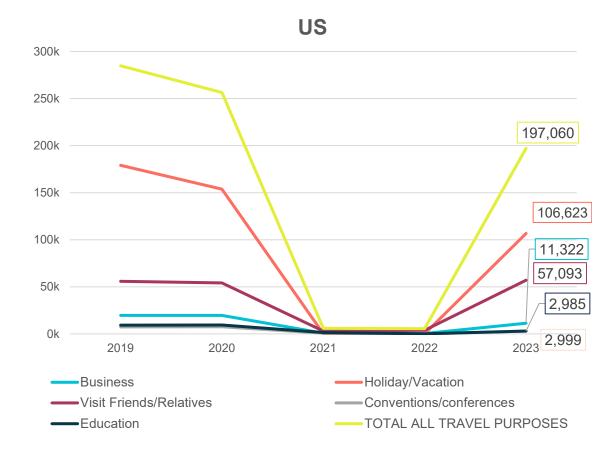












Ngā mihi Thank you

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