

Tātaki
Auckland
Unlimited



Auckland Destination Overview

April 2022

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

Prepared May – June 2022
By Jaimee Raymond, Research & Insights

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Key Visitor Data

 **549.7^k**

Domestic Visitors
April 2022 (Month)
-15.2% (to April 2021)



 **42.6^k**

International Visitors
April 2022 (Month)
+91.1% (to April 2021)



 **45.2%**

Hotel Occupancy Rate
April 2022 (Month)
-13.0pts (to April 2021)



 **\$189^m**

Domestic Tourism Transactions
April 2022 (Month)
-2.6% (to April 2021)



 **\$33^m**

Other Tourism Transactions
April 2022 (Month)
+1.9% (to April 2021)



 **+20**

Tourism Sentiment Score
April 2022 (Month)
+1pts (to April 2021)



Key Visitor Data



DOMESTIC

- On 14 April 2022, all of NZ moved from the Red traffic light setting, to the Orange setting. Capacity limits, scanning requirements and outdoor face mask restrictions were removed in March.
- The year to April 2022 saw **4.47m domestic visitors** to Auckland.
- There were **549.7k domestic visitors in the month of April 2022, a decrease of 15.2%**.
- Visitation from **Waikato was highest** for the year-ending April 2022 (with **1.34m domestic visitors**) and also for the month of April (**172.2k, down 4.7%**).
- Visitors from **Northland** (96.5k, down 11.7%), **Bay of Plenty** (83.9k, down 10.6%), **Wellington** (50.9k, down 24.4%) and **Christchurch** (31.1k, down 35.4%) **were down for the month**.
- On average, domestic visitors stayed in Auckland for **3.3 nights** in April 2022 (up 3.1% on the previous year).
- There were **278.7k domestic guest nights in commercial accommodation** for the month of April, **down 7.5%**.
- Domestic tourism transactions** for the year to April 2022 was **\$1.78b, down 9.7%** on last year and **\$189m for the month (down 2.6%** compared to April 2021).

INTERNATIONAL

- The NZ border reopened to vaccinated Kiwis and other eligible travellers from Australia on 27 February, and to the same groups from the rest of the world on 13 March. On 12 April, borders opened to offshore temporary visa holders and (up to 5k) international students, and class exceptions for critical workforces were considered.
- The year to April 2022 saw **181.2k international visitor arrivals, an increase of 161.5%** on the previous year.
- Monthly international visitors (42.6k) were up 91.1%**.
- There was strong growth for the **Australian market** in the month of **April 2022, with 31.9k visitors, an increase of 72.7%** compared to last April. **The year to April 2022 saw 129.2k Australian visitor arrivals, also up 296.2%**.
- VFR visitors** contributed the most to annual visitor numbers (**117.6k**) and **increased 225.8%** on the year to April 2021. **Monthly VFR numbers (31.2k) were also up 98.2%** compared with the month of April 2021.
- For **YE April 2022, holiday visitors (15.1k) were up 488.9%**, with monthly numbers (**3,169**) also up **106.3%**.
- 37.3k international guest nights in commercial accommodation** for April, **up 16.6%** on last year.
- Other tourism transactions** was **\$0.37b** for the year, **up 14.8%** and **\$33m for the month of April (up 1.9%)**.

OVERALL

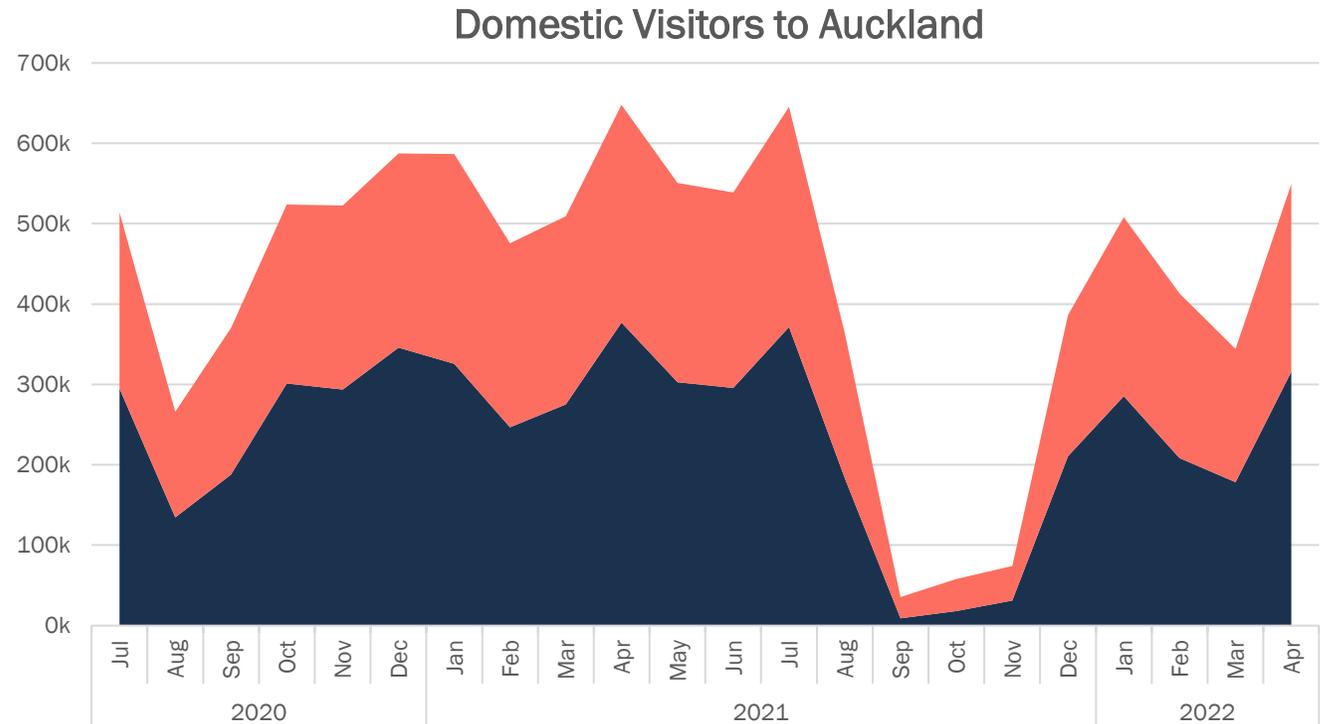
- April Occupancy was 45.2%, down 13.0 percentage points** on April 2021. The **ADR was \$174 (up 1.2%)** and the **RevPAR was \$79 (down 21.5%)**.
- For the month of April 2022, there were **316.0k total guest nights in commercial accommodation** in Auckland (**down 5.2%** on last year).
- There were **898.2k room nights booked in entire place short-term rental listings** in Auckland in the year to April 2022, up 0.2% on the previous year.
- Looking forward into 2022, overall occupancy on the books is higher this year** compared to the same period last year (i.e. from mid-June to early September).
- The **Tourism Sentiment Score** for Auckland for April 2022 was **+20** (-1pt less than NZ), up 1 point to April 2021.
- Categories with the highest sentiment were Destination Services (30), Food and Culinary (28), and Relaxation and Wellness (26), while Access and Transportation (6) and Safety (13) had the lowest sentiment.
- For domestic visitors in **YE March 2022, the Net Promoter Score (NPS) was +1**, (down 1 point on YE December 2021).



Auckland Tourism – Visitor Arrivals Data

4.47m Domestic visitors in YE April 2022

- Over the last 24 months, the domestic market has fluctuated in correlation with the regional and national Covid-related lockdowns.
- On 14 April 2022, all of NZ moved from the Red traffic light setting, to the Orange setting. Capacity limits, scanning requirements and outdoor face mask restrictions were removed in March.
- The year to April 2022 saw 4.47m domestic visitors to Auckland.
- There were 549.7k domestic visitors to Auckland in the month of April 2022, a decrease of 15.2% on the previous April.
- The number of overnight (315.7k, down 16.3%) and day visitors (234.0k, down 13.6%) visiting Auckland in the month of April 2022 fell in comparison to April 2021.



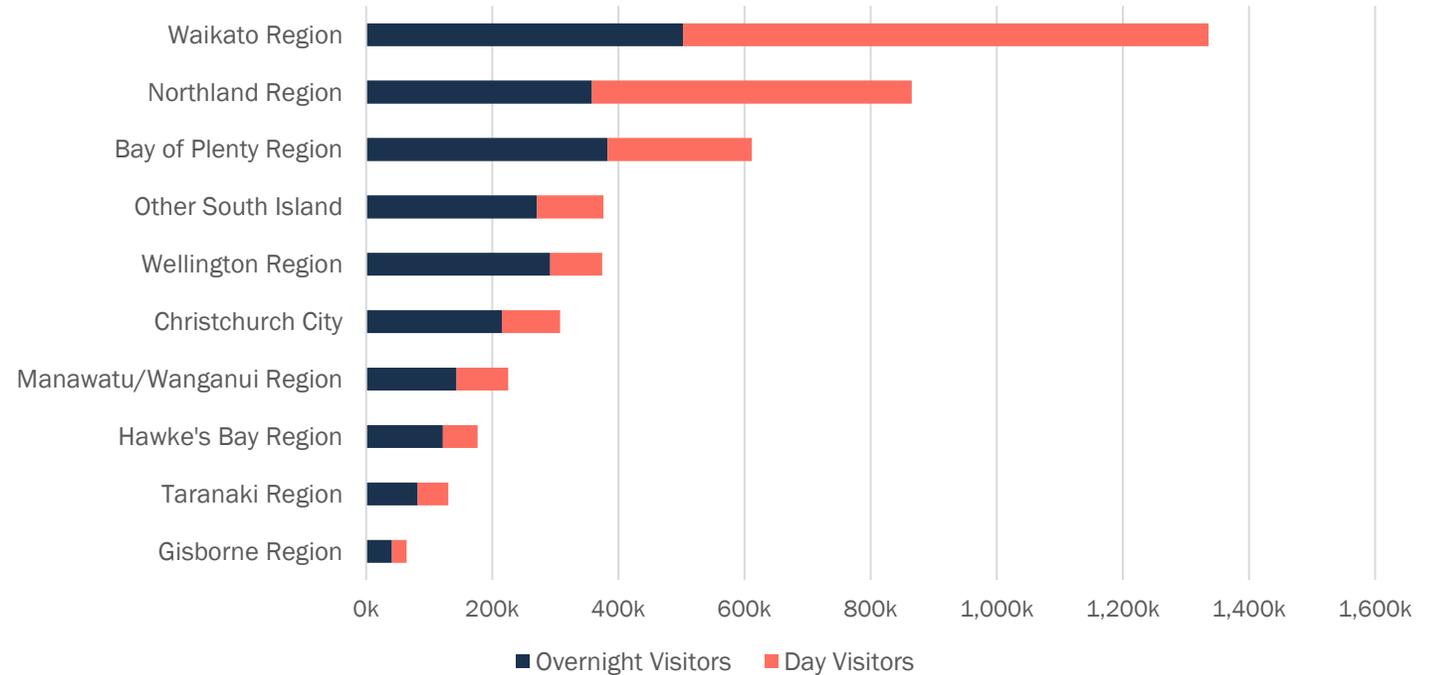
	Overnight Visitors	Day Visitors
April 2022	315.7k	234.0k
April 2021	378.0k	271.7k
YE April 2022	4,467,634	-
YE April 2021	-	-

	Total Domestic Visitors	vs. previous year / YE
April 2022	549,665	-15.2%
YE April 2022	4,467,634	N/a

1.34m Waikato visitors to Auckland in the year to April 2022

- Of Auckland’s domestic visitor drive markets, **visitation from Waikato was highest for the year-ending April 2022** (with **1.34m** domestic visitors) and also for the month of April (172.2k, down 4.7%).
- The other two drive markets were down for the month of April: Northland (96.5k visitors, down 11.7%) and Bay of Plenty (83.9k visitors, down 10.6%).
- In our main domestic fly markets, visitors from Wellington (50.9k visitors, down 24.4%) and Christchurch (31.1k visitors, down 35.4%) were also down for the month compared to last year.

Domestic Visitors to Auckland, by origin (YE April 2022)



	Waikato	vs. previous year	Northland	vs. previous year	Bay of Plenty	vs. previous year	Wellington	vs. previous year	Christchurch	vs. previous year
April 2022	172,211	-4.7%	96,482	-11.7%	83,941	-10.6%	50,929	-24.4%	31,117	-35.4%
YE April 2022	1,336,072	N/a	865,248	N/a	611,769	N/a	374,042	N/a	307,763	N/a

International visitor arrivals were up **161.5%** in YE April 2022

- The NZ border reopened to vaccinated Kiwis and other eligible travellers from Australia on 27 February, and to the same groups from the rest of the world on 13 March. On 12 April, borders opened to offshore temporary visa holders and (up to 5k) international students, and class exceptions for critical workforces were considered.
- The year to April 2022 saw **181.2k international visitor arrivals, an increase of 161.5%** on the previous year.
- The month of April saw **42,631 international visitors, up 91.1%** on the previous April.
- **VFR visitors** contributed the most to annual visitor numbers (**117.6k**) and **increased 225.8%** on the year to April 2021. **Monthly VFR numbers (31.2k)** were **also up 98.2%** compared with the month of April 2021.
- For YE April 2022, holiday visitors (**15.1k**) were **up 488.9%**, with monthly numbers (**3,169**) also up **106.3%**.

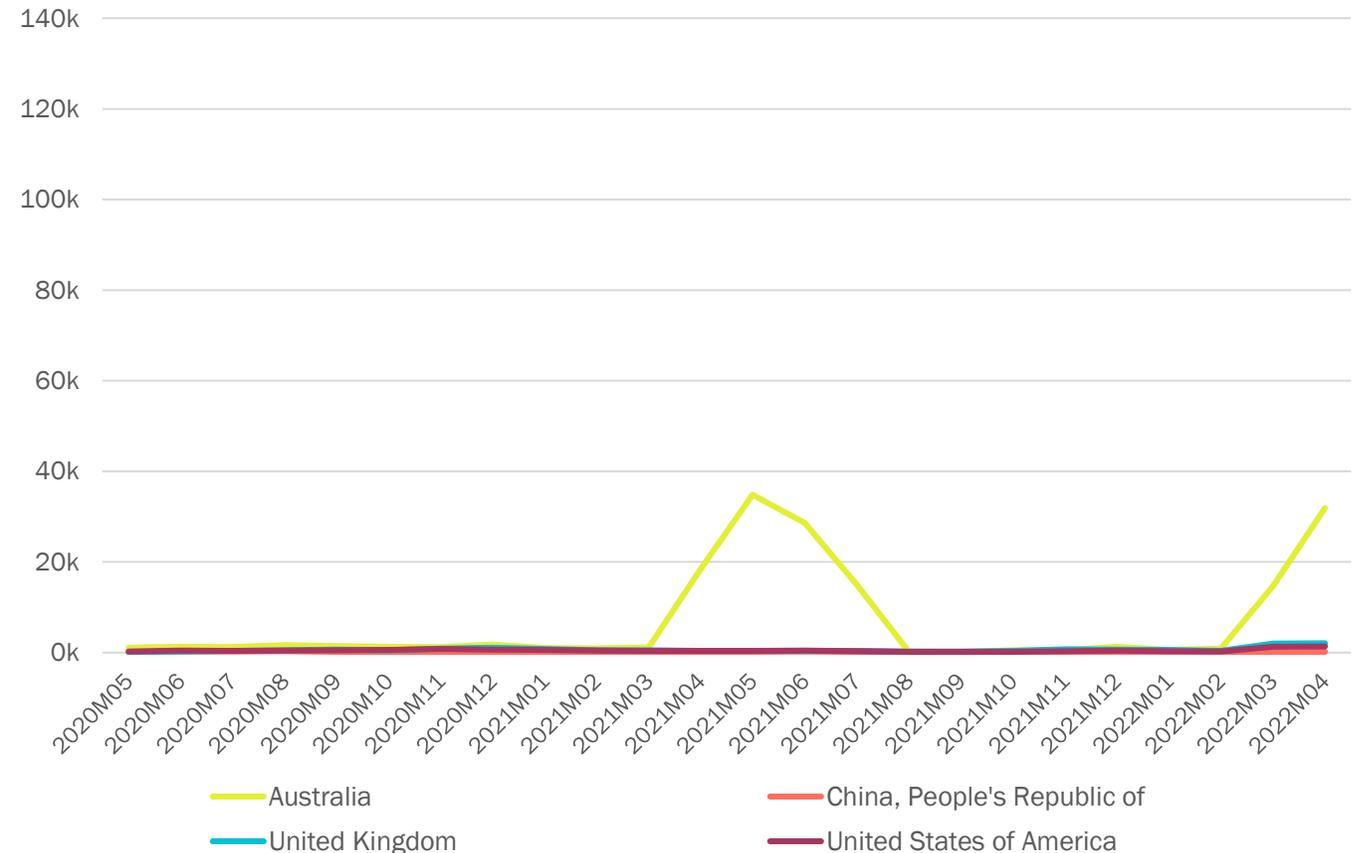


	Visitor arrivals	vs. previous year / YE
April 2022	42,631	91.1%
YE April 2022	181,242	161.5%

31.9k Australian visitor arrivals in April 2022, up 72.7%

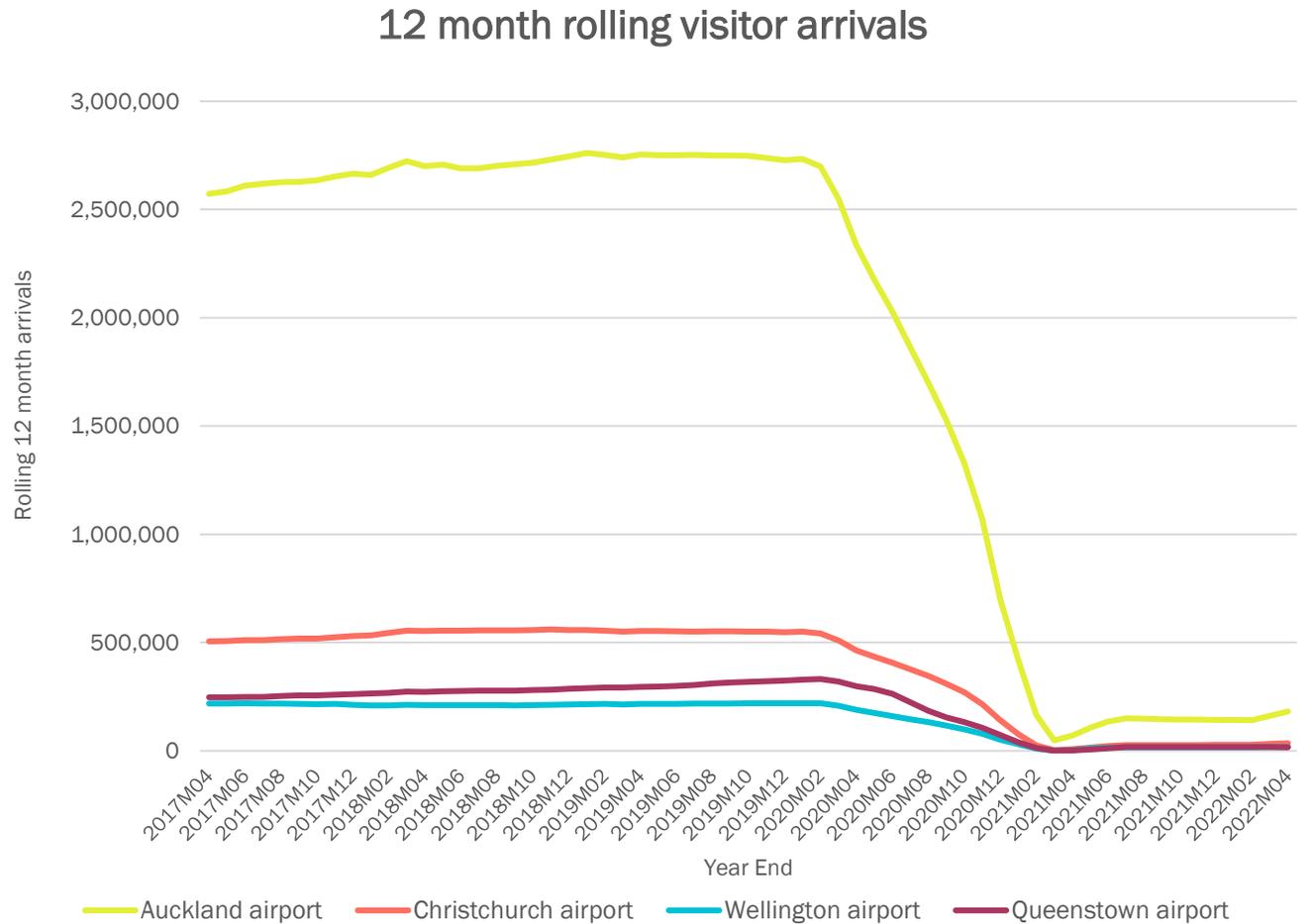
- There was a sharp increase in Australian visitor arrivals in April 2021, when the trans-Tasman travel bubble opened. However, the preceding Lockdowns and travel restrictions put a halt to Australian visitation.
- There was strong growth for the **Australian market** in the month of April 2022, with **31.9k visitors, an increase of 72.7%** compared to last April. **The year to April 2022 saw 129.2k Australian visitor arrivals, also up 296.2%.**
- For YE April 2022, there were 8.3k visitor arrivals from the UK (up 27.3%) and 5.6k visitors from the US (down 5.0%).
- YE April 2022 visitors from China were down (31.3%), and up (48.3%) for the month of April (178).

Visitor arrivals in Auckland by key international markets



Auckland has seen a 161.5% 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 travel bans have had a clear effect on all ports with the greatest impact seen in Auckland reflecting the largest market share.
- However, with NZ borders starting to reopen Auckland has seen a 161.5% increase in international visitor arrivals over the last year.





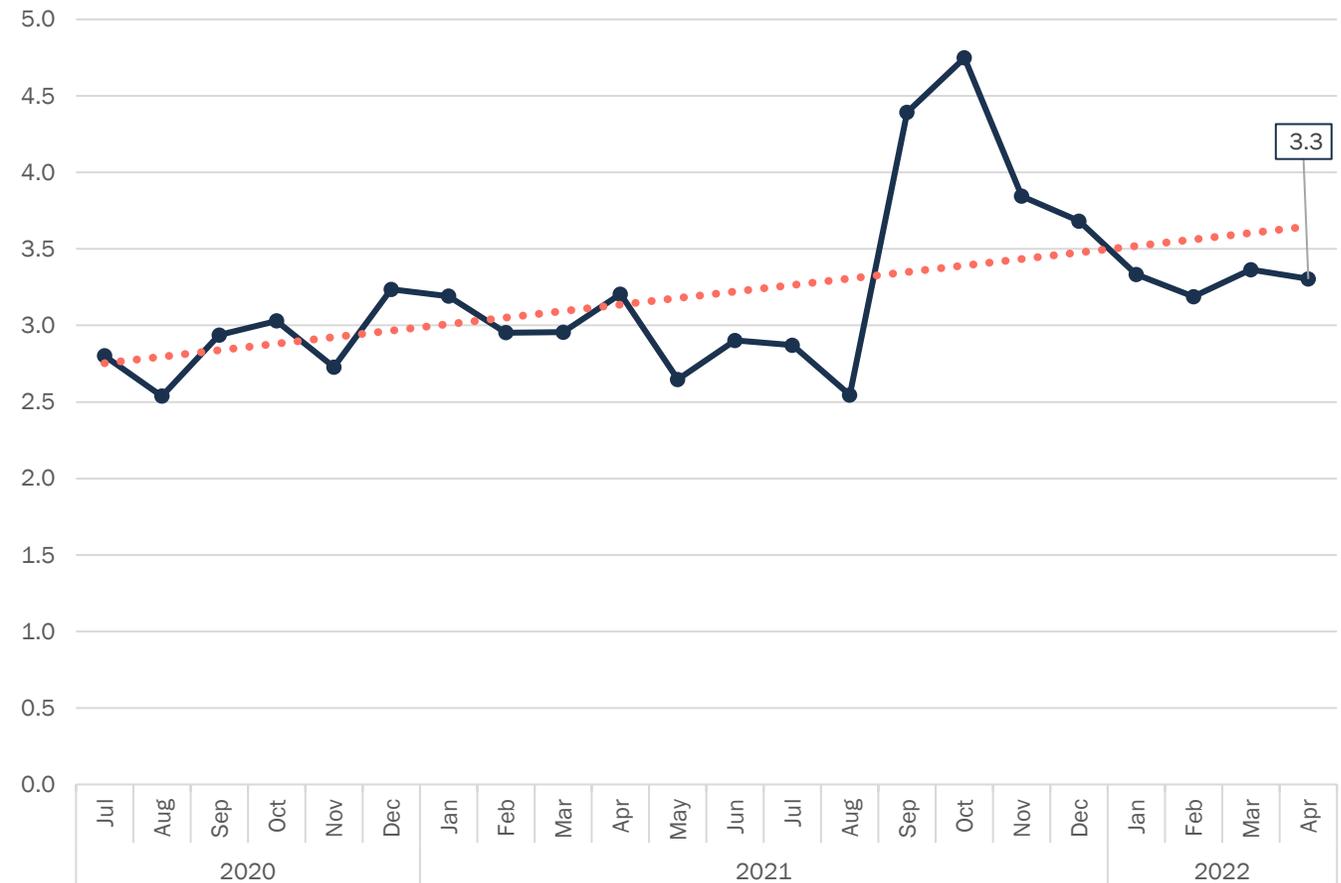
Auckland Tourism – Accommodation Data

On average, domestic visitors stayed 3.3 nights in Auckland for April 2022

- On average, domestic visitors stayed in Auckland for **3.3 nights** in the month of April 2022 (up 3.1% on the previous year).
- There has been a slight upward trend in the average length of stay for domestic visitors to Auckland over the last 24 months.
- Although domestic visitation has been varied, domestic visitors are staying in Auckland for longer periods of time.
- *Nb. Average length of stay is based on overnight visitors only.*

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Average length of stay – Domestic visitors



278.7k domestic guest nights in commercial accommodation in April 2022, down 7.5%

- For the month of April 2022, there were **316.0k total guest nights in commercial accommodation in Auckland**, down 5.2% on the same month last year.
- There were **278.7k domestic guest nights** in commercial accommodation (down 7.5%), and **37.3k international guest nights (up 16.6%)** in commercial accommodation in April 2022.
- For New Zealand overall, there were 2.47m guest nights in commercial accommodation, down 14.4% compared to April 2021.

Guest nights in commercial accommodation - Auckland

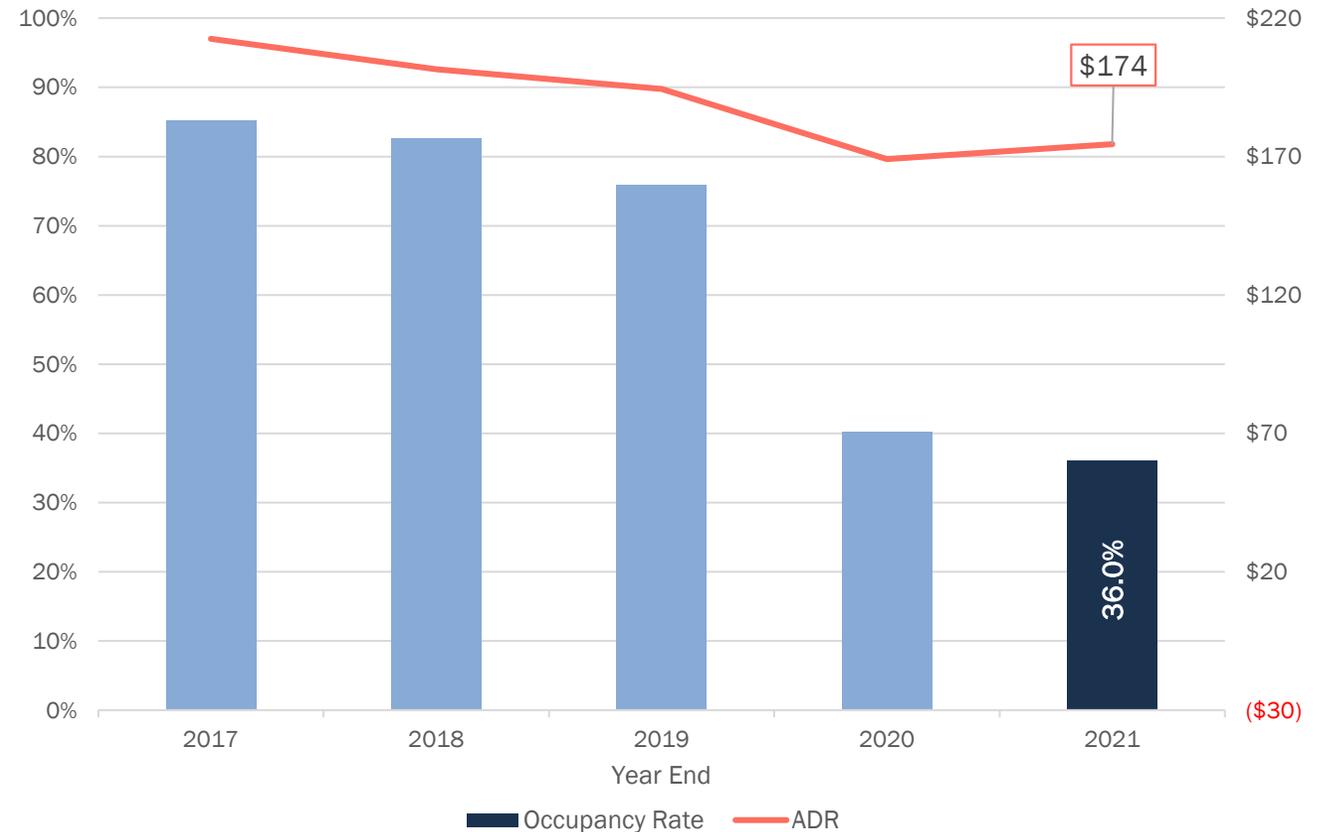


April 2022	Auckland	% change	New Zealand	% change
Total guest nights	316,000	-5.2%	2,466,100	-14.4%
Domestic guest nights	278,700	-7.5%	2,343,600	-14.6%
International guest nights	37,300	16.6%	122,500	-11.3%

April 2022 Occupancy was 45.2%, down 22.4pts

- Covid affected the year-end average hotel occupancy rate, which was **36.0%** for the **year to April 2022**, with a **decrease of 4.2pts** compared to the previous year-end.
- The average daily rate (ADR) for hotels in the year to April 2022 was **\$174 up 3.2%** on the previous year.
- The **RevPAR** for the year ending April 2022 was **\$63 down 7.6%** on the previous year.
- **April Occupancy** was **45.2%**, down **13.0pts** on April 2021. The **ADR** was **\$174 (up 1.2%)** and the **RevPAR** was **\$79 (down 21.5%)**.

Annual Hotel Accommodation in Auckland Occupancy and Average Daily Rate



Occupancy and RevPAR peaked on 16th April 2022

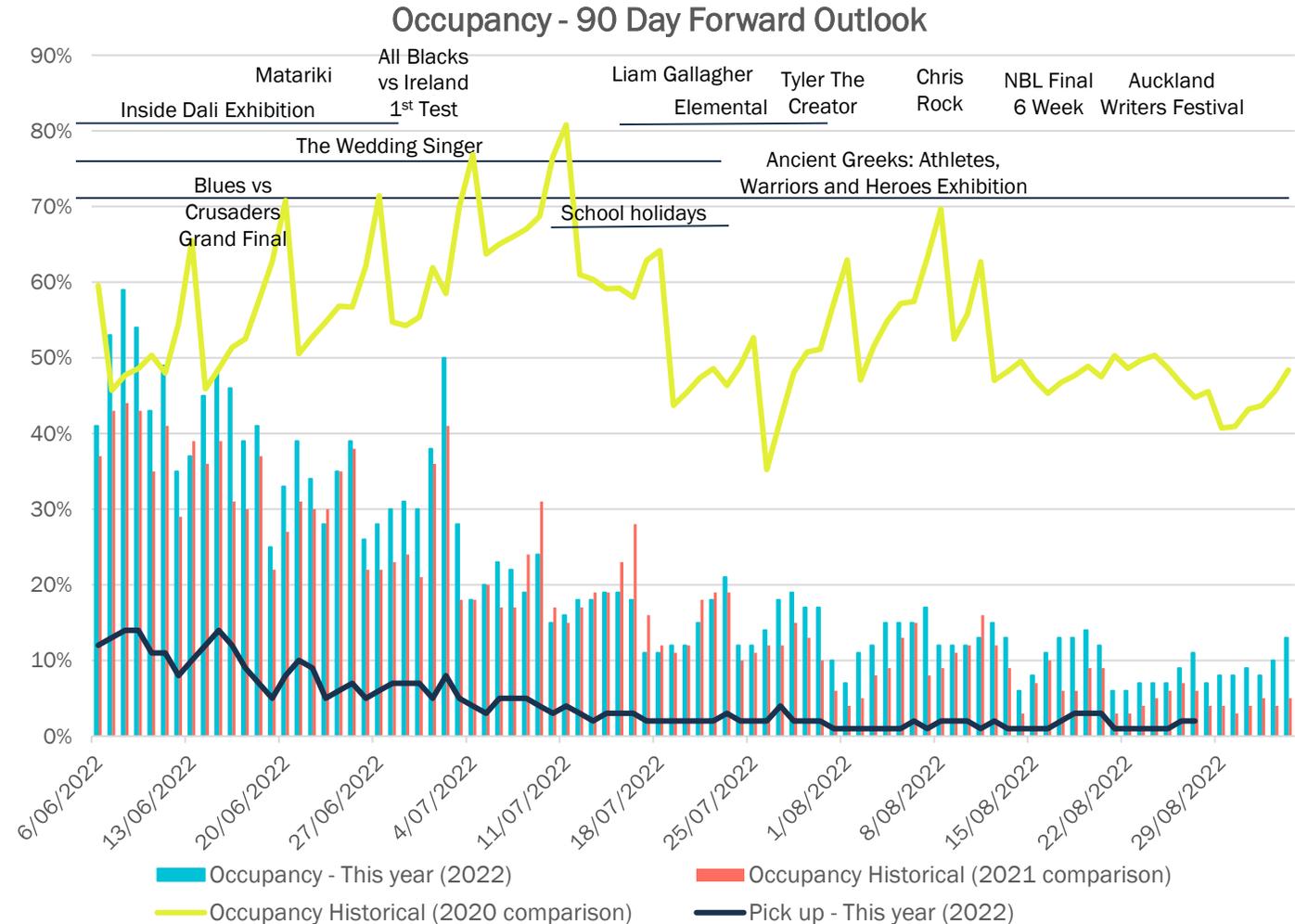
- A quarter (26%) of the hotels covered here are in fact, isolation hotels.
- Average Daily Rate (ADR) was on average 3.0% lower compared with April last year.
- There were large fluctuations in percentage change for ADR, RevPAR and Occupancy rates in April 2022. Occupancy and RevPAR peaked on Saturday 16th April, while ADR peaked on Saturday 9th April 2022.

Percent Changes for the Month of April



90 Day Forward Booking Occupancy Data

- Looking forward, overall occupancy on the books is higher this year compared to the same period last year (i.e. from mid-June to early September).
- Occupancy levels for the weekend of Matariki (24-26 June) are currently higher than occupancy levels recorded last year.
- At present, occupancy during mid-July is lower than the same period last year however, this could likely improve.
- Occupancy peaked at 59% on the 8th June this year.



45.8k entire place short-term rental listings available for YE April 2022

- AirDNA collects active short-term vacation rental data from hundreds of sources (e.g. Airbnb) to build a comprehensive view of the short-term rental market. For Auckland, this is dominated by **Airbnb** related data.
- The number of available listings has dropped since February 2020, most likely in response to the travel bans and lockdowns.
- Entire place available listings for the year (45.8k, down 15.0%) and month (3,745, down 17.5%) were down on the previous April.
- Private room available listings for the year (19.5k, down 24.9%) and month (1,524, down 26.0%) were also down.

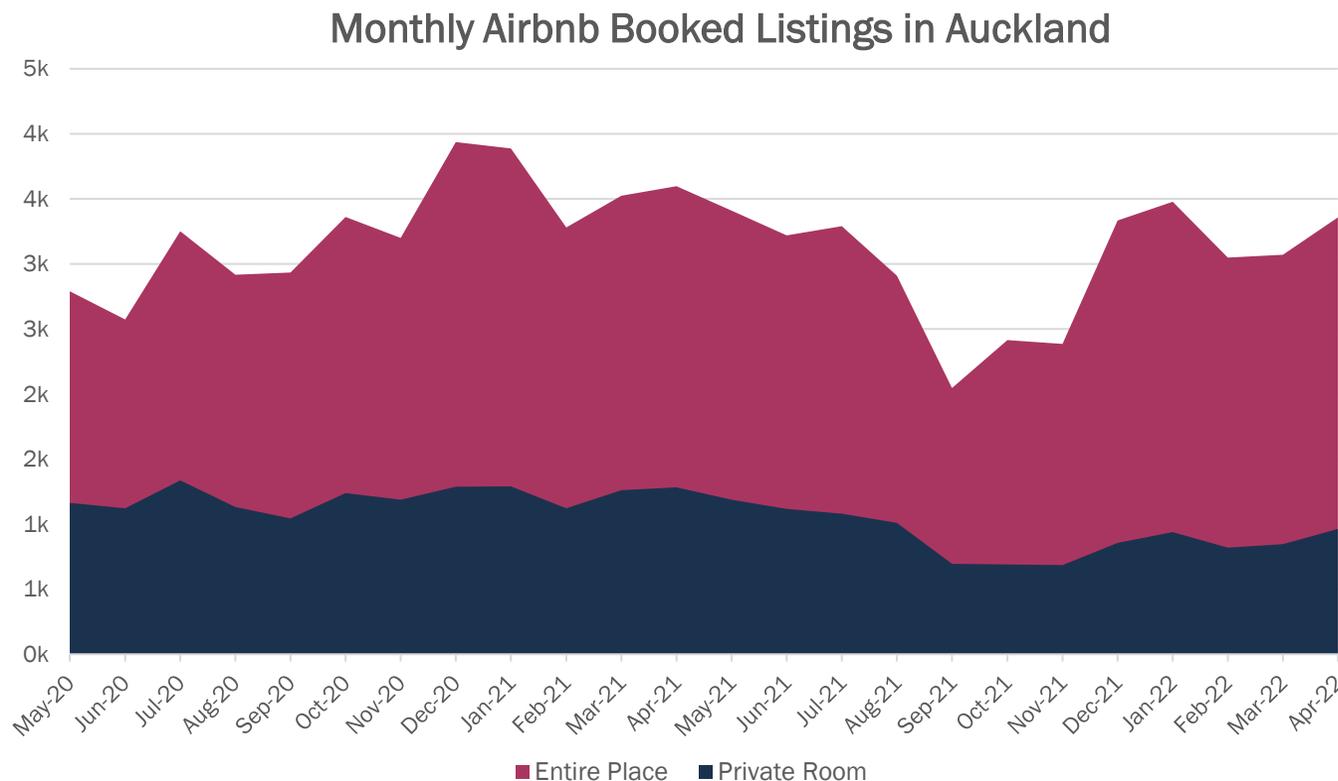
Monthly short-term rental Available Listings in Auckland



	Entire Place	vs. previous year/ YE	Private Room	vs. previous year/ YE
April-2022	3,745	-17.5%	1,524	-26.0%
YE April 2022	45,754	-15.0%	19,528	-24.9%

36.0k entire place booked listings on the short-term rental market for YE April 2022

- There were 36.0k entire place booked listings on the short-term rental market in Auckland in the year to April 2022, down 8.4% on the previous year.
- For the month of April, entire place booked listings (3,359) were down 6.6% compared to April 2021.
- For the year ending April 2022, private room booked listings (10.9k) were down 24.7%.
- For the month of April, private room booked listings (964) were down 24.9% compared to the previous year.



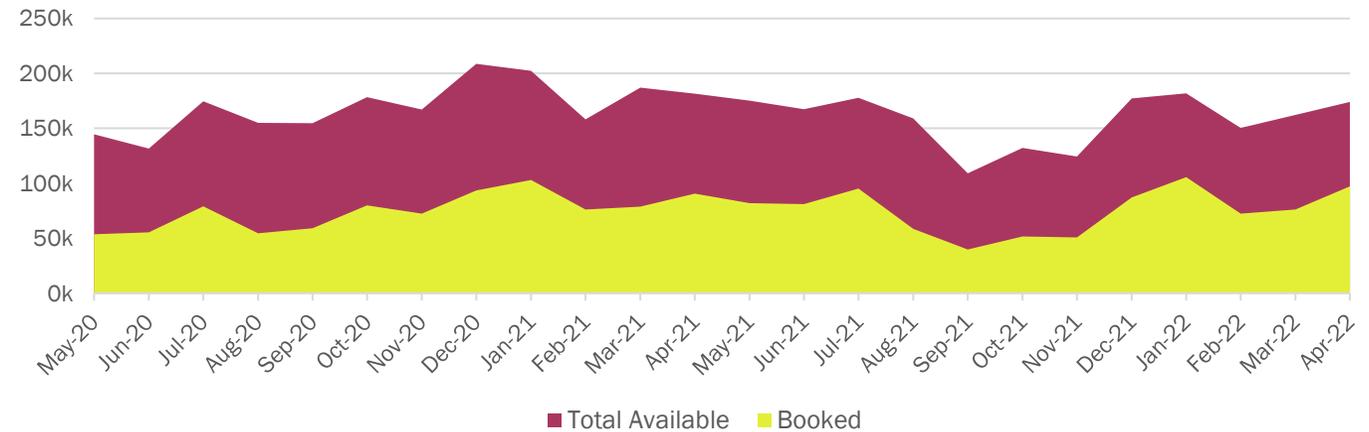
	Entire Place	vs. previous year/ YE	Private Room	vs. previous year/ YE
April-2022	3,359	-6.6%	964	-24.9%
YE April 2022	35,961	-8.4%	10,893	-24.7%

97.2k room nights booked in entire place short-term listings in April 2022, up 7.3%

- There were 898.2k room nights booked in entire place short-term rental listings in Auckland in the year to April 2022, up 0.2% on the previous year.
- For the month of April, room nights booked in entire place listings (97.2k) were up 7.3% on April 2021.
- For the year ending April 2022, room nights booked in hotel comparable listings (182.5k) were down 6.2%.
- For the month of April, there were 18.1k room nights booked in hotel comparable listings, down 6.0% compared to the previous April.
- *Hotel Comparable Listings are Studio and one-bedroom entire place rentals that are most likely to compete directly with hotels.*

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Short-term rental Entire Place Room Nights in Auckland



Short-term rental Hotel Comparable Room Nights in Auckland



Average Length of Stay Update

- At present, we cannot display current average length of stay data from the International Visitor Survey (IVS) as the survey has been put on hold by the New Zealand Government, due to low numbers of international visitors.
- Average length of stay results for international visitor arrivals will be reported again once the IVS has been restarted, which is expected to be once the borders reopen.
- We are unable to report average length of stay for domestic visitors as the AA Traveller Monitor survey has also recently been discontinued.
- Once an alternative dataset becomes available, we will commence reporting on this.



Auckland Tourism - Spend Data

\$1.78b in Domestic tourism transactions for YE April 2022

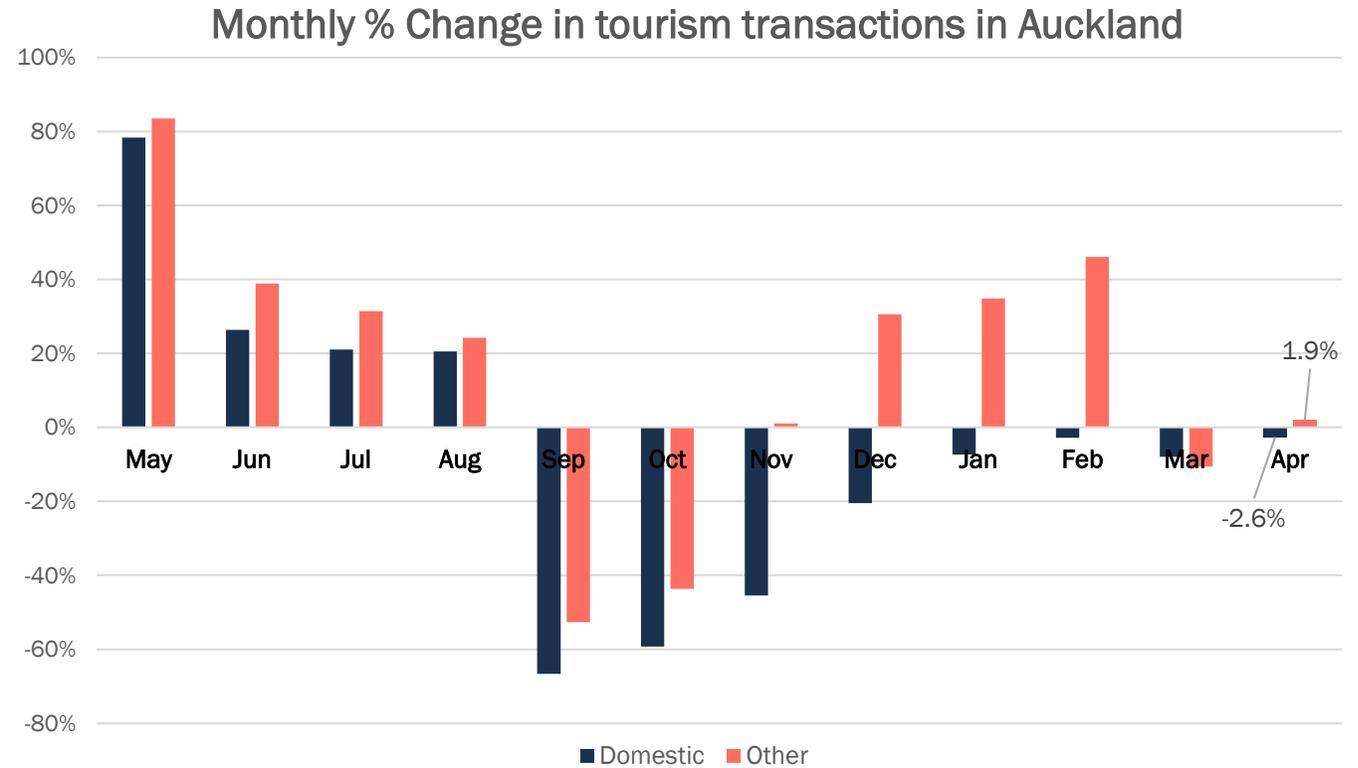
- Looking back on the last 24 months, domestic tourism transactions have fallen in correlation with each of Auckland’s regional lockdowns i.e., in April and August 2020, and again in February 2021 and August through to September in 2021.
- In the year to April 2022, Domestic tourism transactions was **\$1.78b (down 9.7%)**, while Other tourism transactions was **\$0.37b, up 14.8%** for the year.
- The Tourism Electronic Card Transactions (TECTs) are an interim replacement to Monthly Regional Tourism Estimates (MRTEs) that provide insights into monthly tourism spend and were introduced in November 2020. TECTs include only tourism-related electronic card transactions (ECT) paid through EFTPOS machines. More info can be found [here](#).



Tourism Transactions	YE April 2022 (\$b)	% change
Domestic	1.778	-9.7%
Other	.372	14.8%

Domestic tourism transactions were \$189m for April 2022, down 2.6%

- For the month of April 2022, domestic tourism transactions (TECTs) was \$189m, down 2.6% compared with the same month in 2021.
- Other tourism transactions in April 2022 was \$33m (up 1.9%) compared to April 2021.

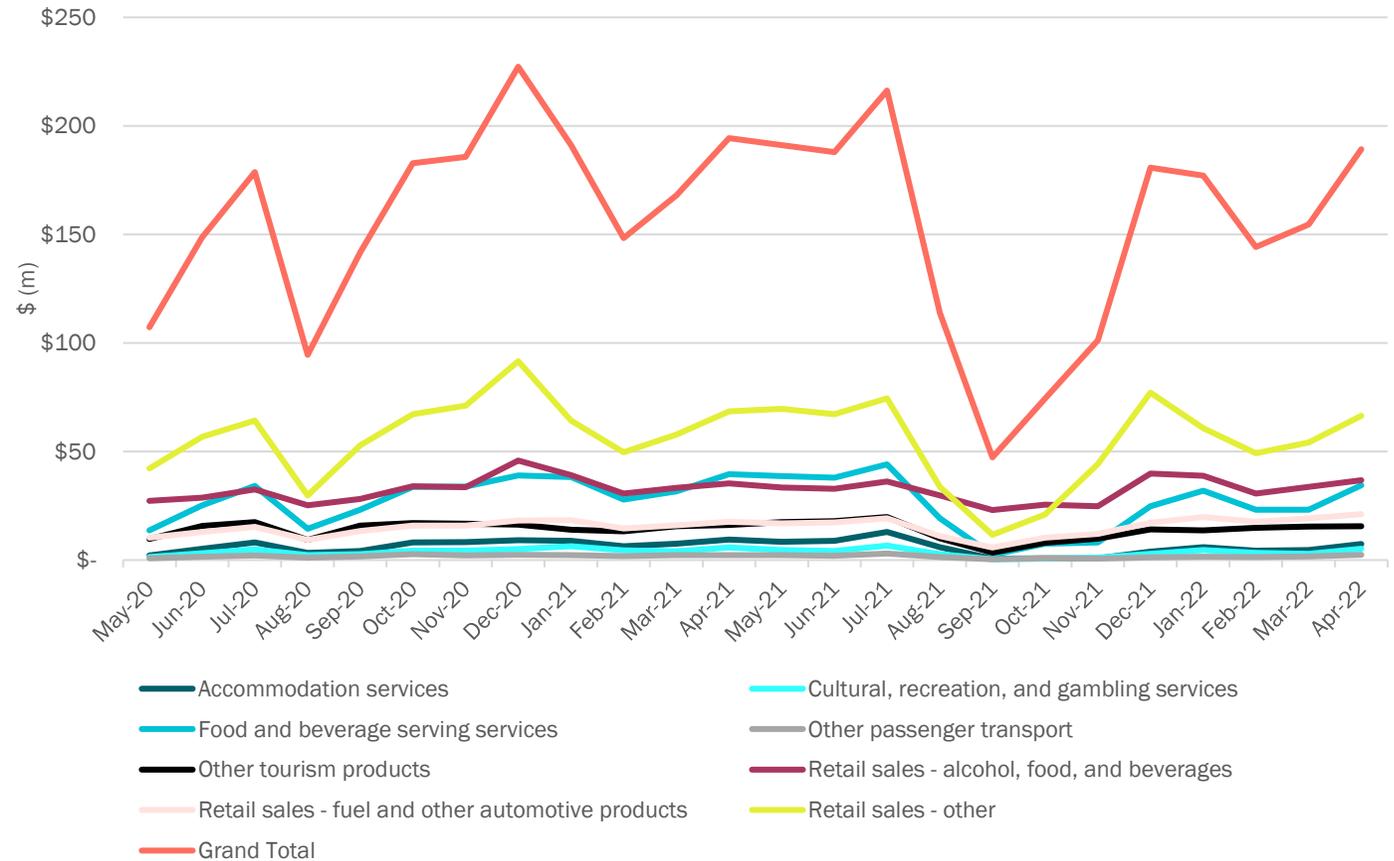


Tourism Transactions	April 2022 (\$m)	% change
Domestic	189	-2.6%
Other	33	1.9%

\$21.1m Domestic transactions in Retail sales – other in April 2022, up 20.0%

	Spend (\$m)	% change
Accommodation services	7.4	-21.1%
Cultural, recreation, and gambling services	5.2	-9.8%
Food and beverage serving services	34.4	-13.1%
Other passenger transport	2.3	1.8%
Other tourism products	15.6	-2.9%
Retail sales - alcohol, food, and beverages	36.8	4.4%
Retail sales - fuel and other automotive products	21.1	20.0%
Retail sales - other	49.1	-3.0%
Grand Total	189.2	-2.6%

Domestic monthly tourism transactions in Auckland, by product



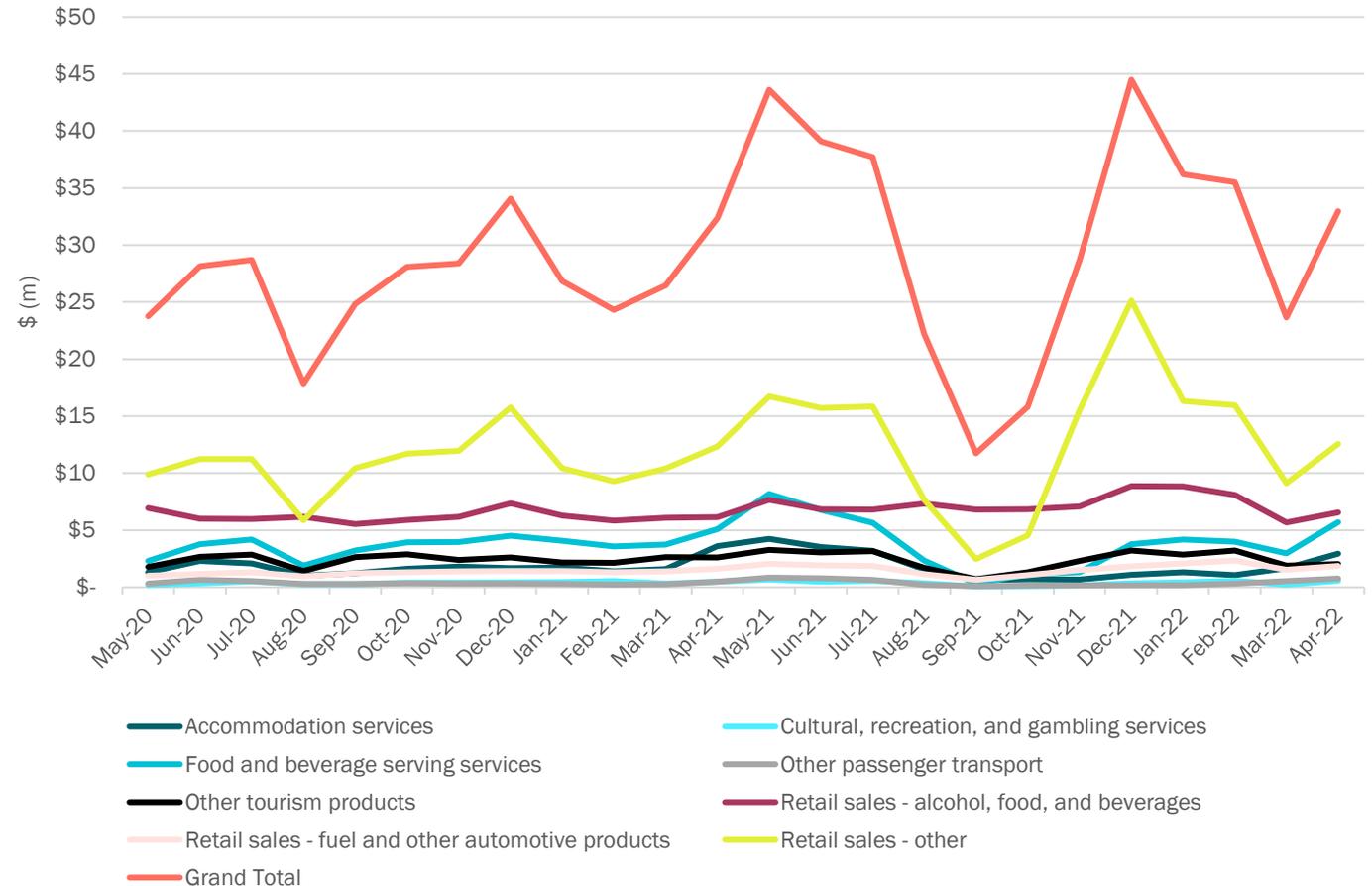
\$12.6m spent in Retail sales (other) by Other visitors in April 2022, up 1.7%

	Spend (\$m)	% change
Accommodation services	2.9	-18.5%
Cultural, recreation, and gambling services	0.6	19.1%
Food and beverage serving services	5.7	11.7%
Other passenger transport	0.8	60.8%
Other tourism products	2.0	-21.4%
Retail sales - alcohol, food, and beverages	6.5	6.4%
Retail sales - fuel and other automotive products	1.9	15.4%
Retail sales - other	12.6	1.7%
Grand Total	33.0	1.9%

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Source: MBIE TECTs.

Other monthly tourism transactions in Auckland, by product





Auckland Tourism – Major and Business Events Data

Business Events Insights



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97

Business events in Auckland
Q1 March 2022



11.0^k

Delegates hosted in Auckland
Q1 March 2022



15.0^k

Delegate days hosted in Auckland
Q1 March 2022



29%

Auckland's market share of
business events
Q1 March 2022



33%

Auckland's market share of
delegates
Q1 March 2022



23%

Auckland's market share of
delegate days
Q1 March 2022





Auckland Tourism – Tourism Sentiment Index

Tourism Sentiment Index (TSI)

- The Tourism Sentiment Index (TSI) is a measure of a destination's ability to generate positive word of mouth about its tourism offering.
- It is an aggregate score (ranging from -100 to +100) that focuses on online conversations and measures attitudes and overall perceptions of Auckland's tourism offering.
- The TSI analysis applies a custom, text- and image-based algorithm focused on conversations about Auckland and its connected region.
- More than 500,000 different sources are included in the analysis including online media sites, forums, reviews, and social networks (Twitter, Facebook, Instagram, YouTube, Tumblr and TripAdvisor).
- The TSI is used as an indicator to gauge current performance and provide a benchmark over time.



Tourism Sentiment Index KPIs - Overall

- The overall Tourism Sentiment Score for Auckland for the month of April 2022 was +20 (-1pt less than NZ), up 1 point to April 2021.
- Of all conversations online being driven by Auckland’s tourism experience or products, 23% of those conversations were identified as destination promoters.
- This includes 3,858 online conversations about Auckland (down 6%), while 39,629 online conversations were included for NZ (down 13%).
- The TSI Score for Auckland was ‘Average’ in comparison to global tourism sentiments, which indicates an opportunity for improvement.
- The general emotional tone of online conversations was ‘Joy’ for both Auckland and NZ.
- The general emotional tone of online conversations was ‘Joy’ for both Auckland and NZ.
- Topics that drove positive sentiment for Auckland were ‘Beaches’ and ‘Restaurant, Dining and Takeaway’, while negative sentiment was driven by ‘Sky diving, Bungee and Ziplining’ and ‘Biking and Cycling’.

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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 2022 were Access and Transportation (23%), followed by Outdoor Activities (18%), and Food and Culinary (15%).
- Categories with the highest sentiment were Destination Services (30), Food and Culinary (28), and Relaxation and Wellness (26), while Access and Transportation (6) and Safety (13) had the lowest sentiment.
- Sub-categories that drove positive sentiment were Diving and Snorkeling (72), Spa and Wellness (68), Religious Attractions (54), and Weddings (44).
- The lowest sentiment was recorded in Biking and Cycling (0), Museum and Galleries (1), Sky Diving, Bungee and Ziplining (3) and Cruises (3).
- Auckland sentiment was higher in Safety (+7), Relaxation and Wellness (+4), Outdoor Activities (+4) and Destination Services (+3), in comparison to NZ.
- Joy was the general emotional tone for all categories for the month of April 2022.

CATEGORIES	AUCKLAND			NEW ZEALAND		
	Volume	Emotion	Sentiment	Volume	Emotion	Sentiment
▲ Access + Transportation	23% ▼ 4%	Joy	6 Average	13% ▼ 1%	Joy	8 Average
▲ Outdoor Activities	18% ▼ 1%	Joy	25 Average	28% ▼ 1%	Joy	21 Average
▲ Food + Culinary	15% ▲ 4%	Joy	28 Average	15% ▲ 4%	Joy	31 Average
▲ Relaxation + Wellness	12% ▲ 2%	Joy	26 Average	10% ▲ 1%	Joy	22 Average
▲ Amenities + Entertainment	11% ▲ 1%	Joy	19 Average	8% ▼ 3%	Joy	24 Average
▲ Destination Services	7% ▲ 0%	Joy	30 Average	8% ▲ 3%	Joy	27 Average
▲ Safety	7% ▼ 3%	Joy	13 Average	13% ▼ 3%	Fear	6 Average
▲ Culture + History	6% ▼ 1%	Joy	13 Average	6% ▲ 1%	Joy	17 Average

Tourism Sentiment Index Score Trends



- The Tourism Sentiment Index (TSI) Score trend line for Auckland has fluctuated from 1st May 2021 to 30th April 2022.
- Auckland TSI fell in March 2021 through to May after a lockdown in February 2021. TSI then lifted in June–July but dropped again in August–September after another lockdown.
- TSI increased in October 2021 but fell in November. Auckland’s TSI rose from December 2021 onwards, peaking in February 2022 but has dropped slightly in April 2022.





Auckland Visitor Survey

Visitor Experience



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30%

Promoters
Net Promoter Score
YE March 2022
No change




29%

Detractors
Net Promoter Score
YE March 2022
+1




1 NPS

Total
Net Promoter Score
YE March 2022
-1




7.3 / 10

Total Satisfaction
Overall experience in
Auckland
YE March 2022
No change



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 March 2022, NPS was +1, (down 1 point on YE December 2021).
- The NPS for VFR visitors fell 3 points (to 0), and for those visiting Auckland for a holiday, vacation or short break, the NPS increased 1 point (to +14).
- Domestic visitors most likely to recommend Auckland as a visitor destination include those aged 30-44 years (NPS +10), Canterbury and Otago residents (NPS +13 and NPS +21 respectively), those who main reason to visit is a conference, convention or other business event (NPS +18) and those who also include Northland in their itinerary (NPS +17).

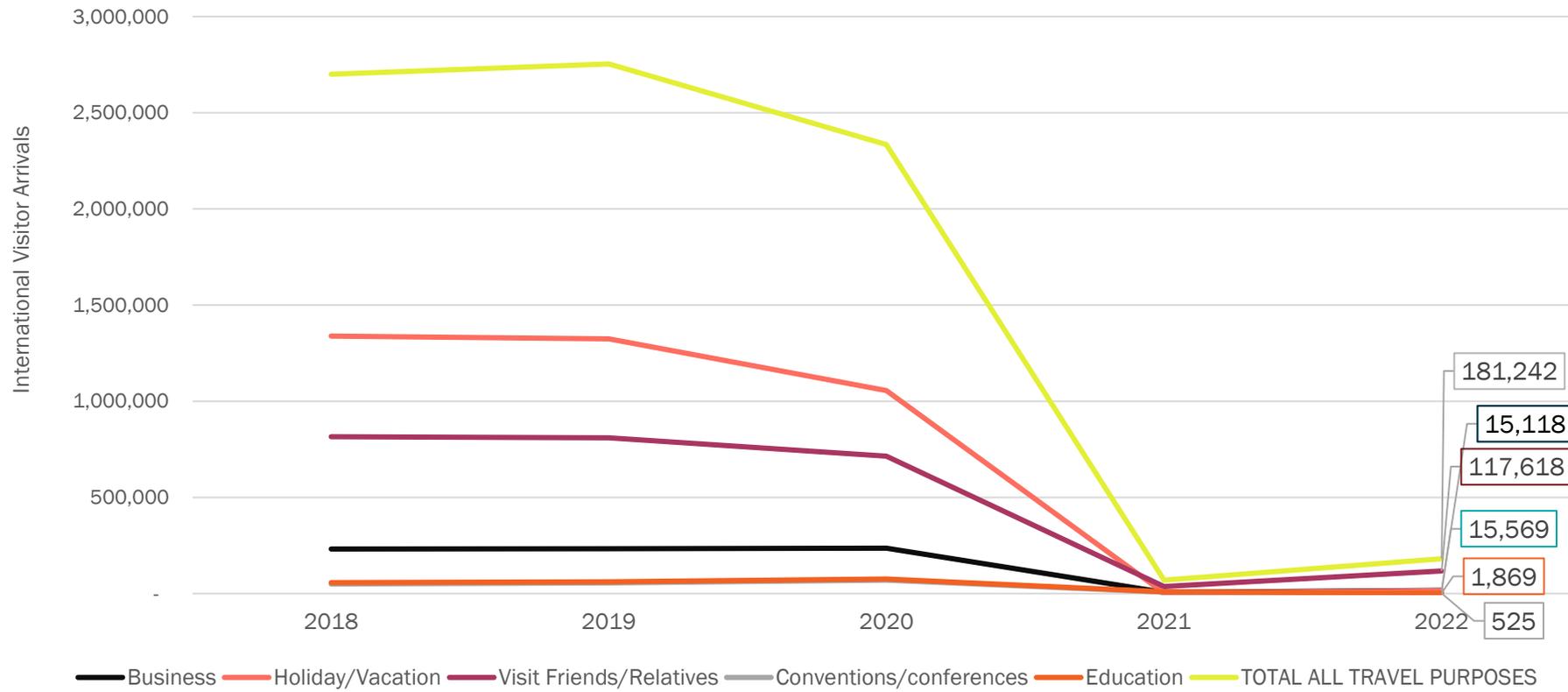


Note: YE March 2022 findings are based on domestic visitors only and are compared to YE December 2021 domestic visitor results. No data collection occurred in Q2 2020.



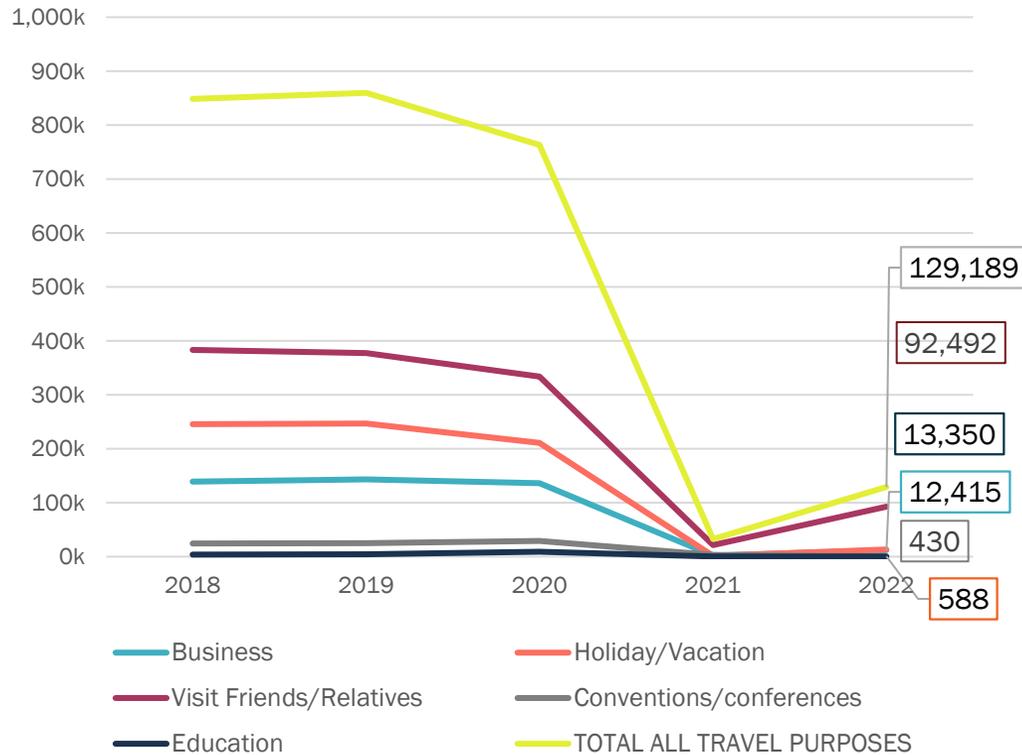
Five-year trends in key markets

Five-year visitor arrivals to Auckland, YE April

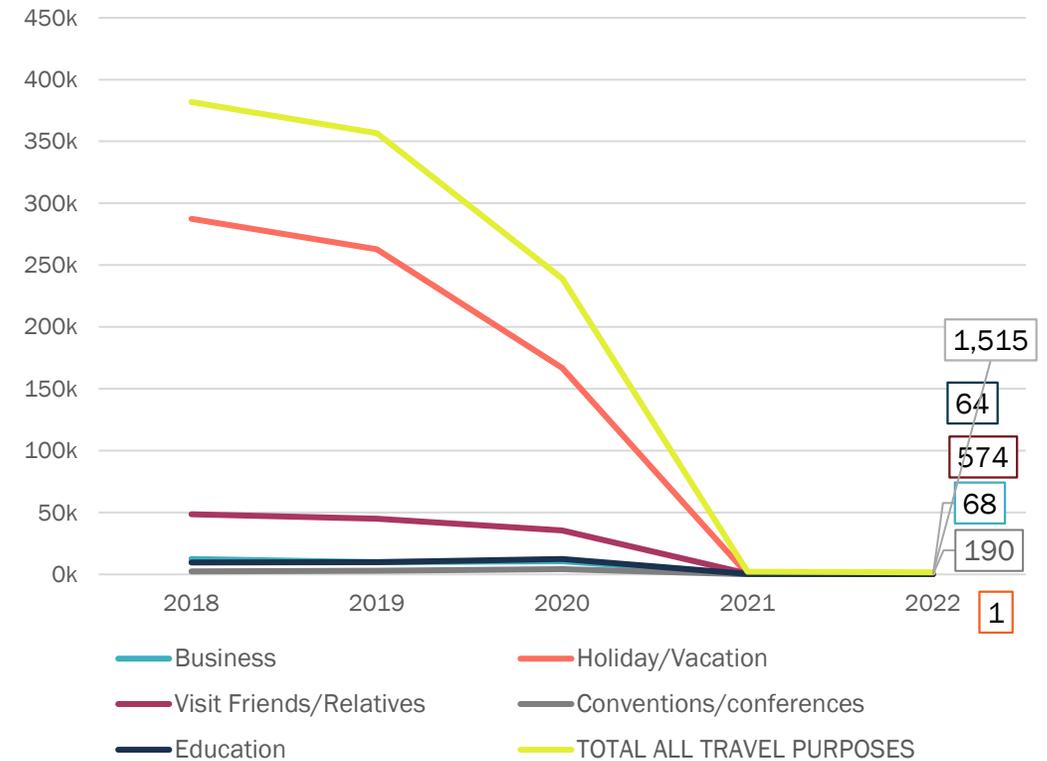


Five-year visitor arrivals to Auckland, YE April

Australia

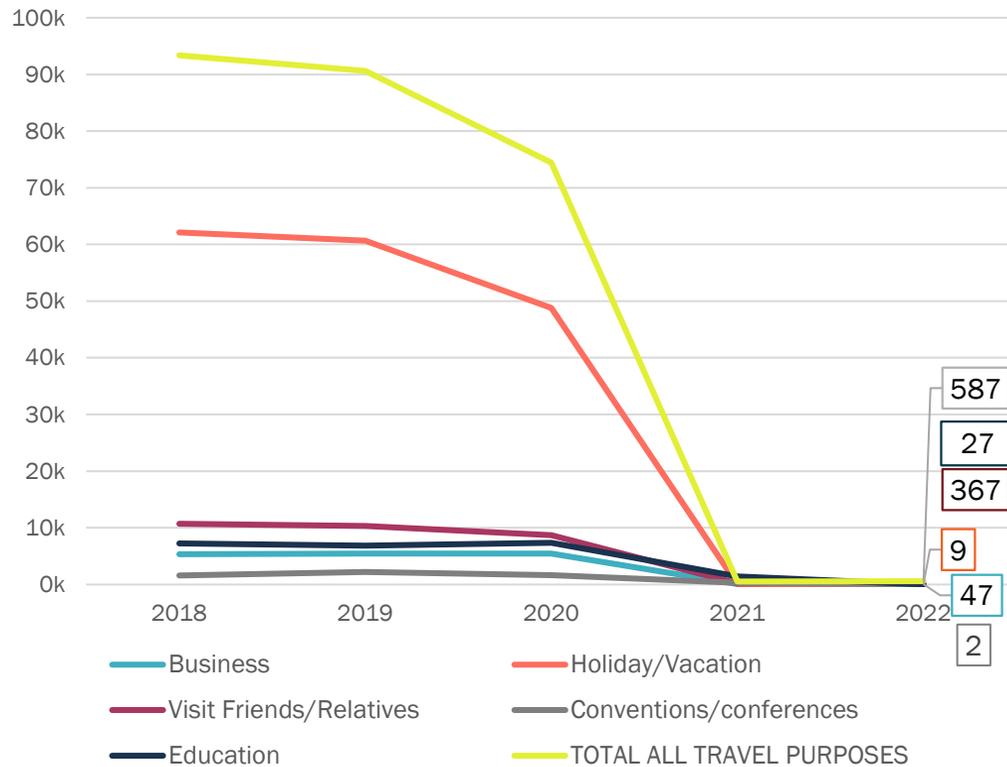


China

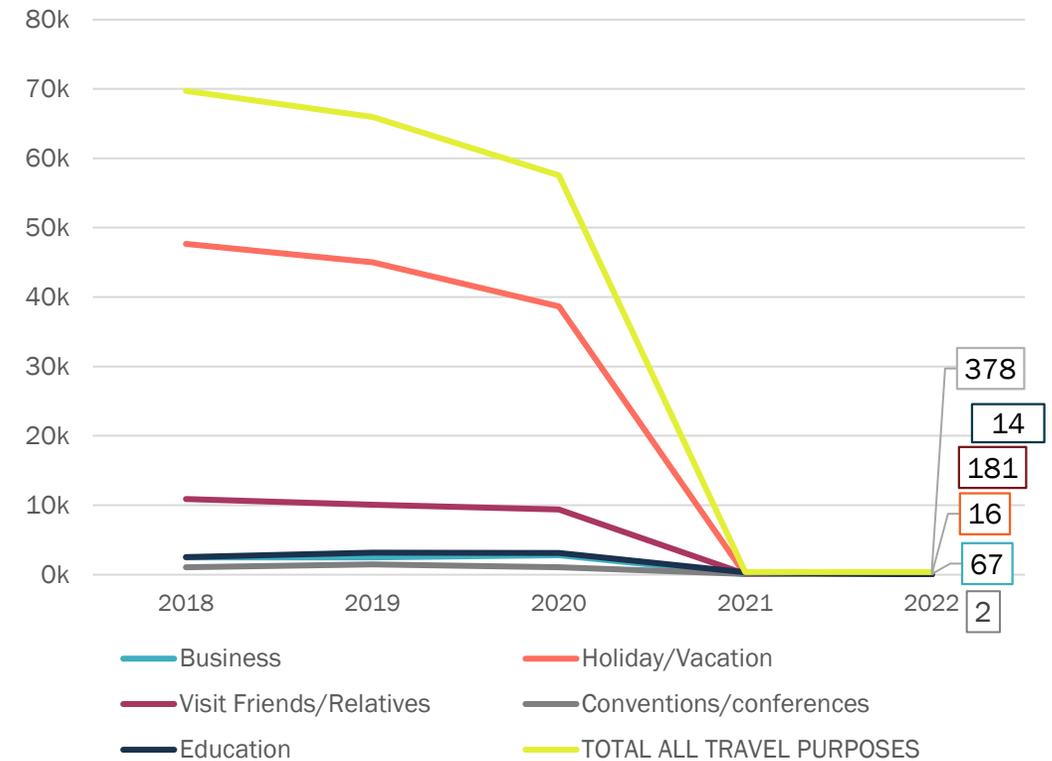


Five-year visitor arrivals to Auckland, YE April

Japan

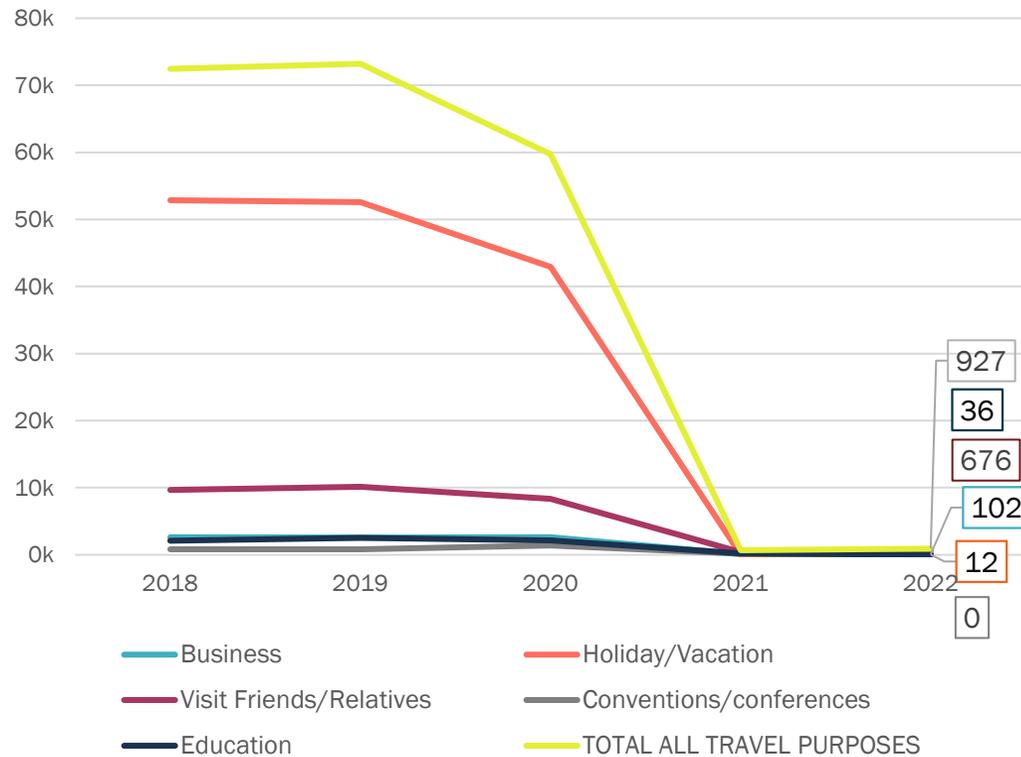


Korea

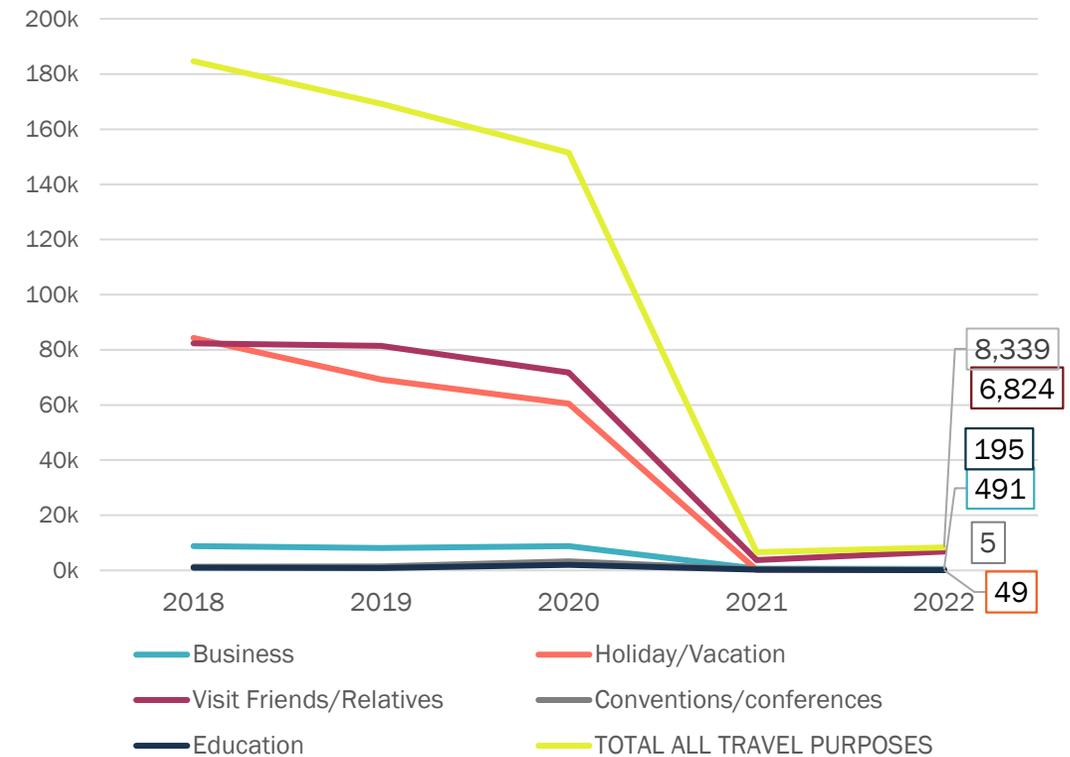


Five-year visitor arrivals to Auckland, YE April

Germany

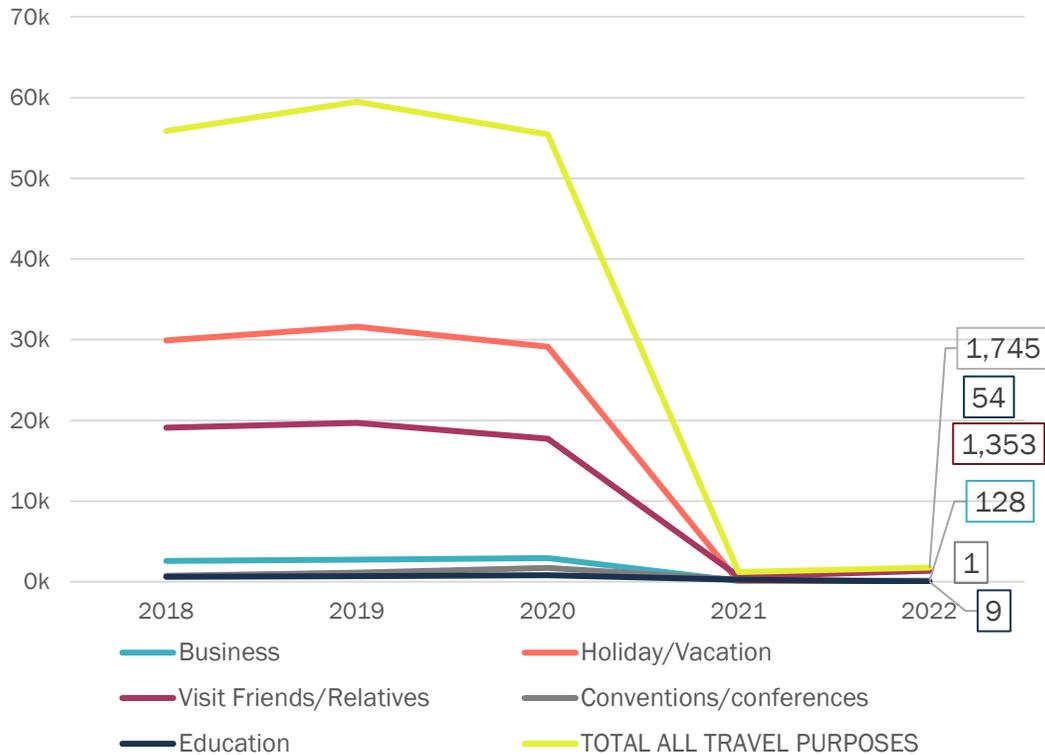


UK

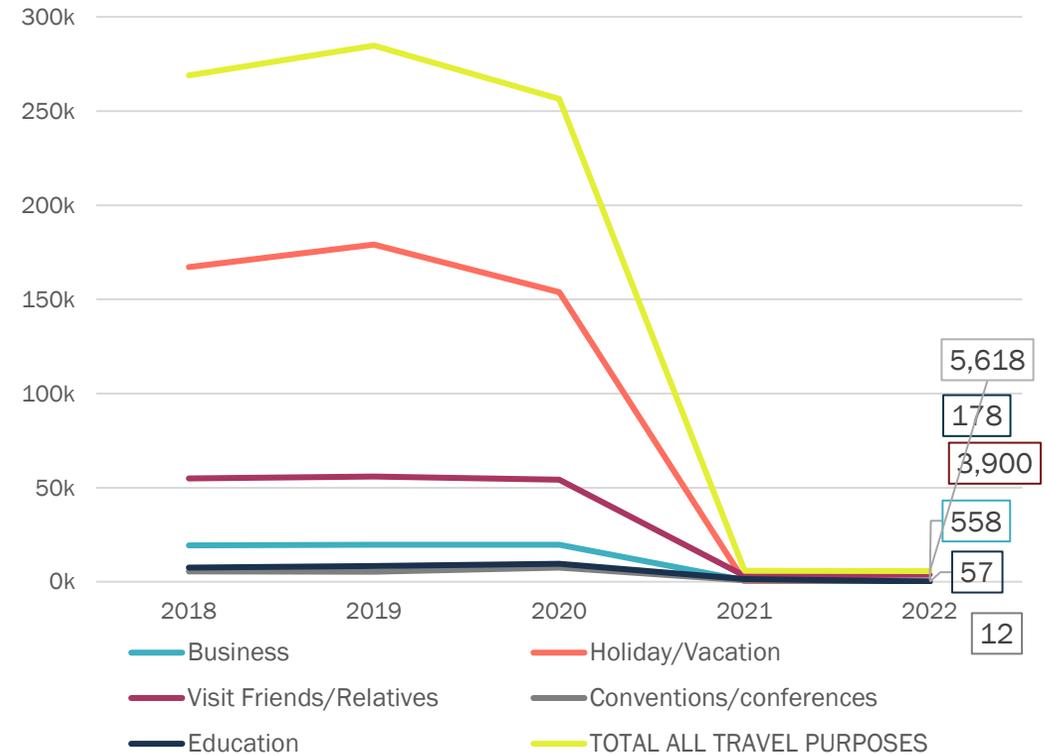


Five-year visitor arrivals to Auckland, YE April

Canada



US



Ngā mihi Thank you

- KEY CONTACT

Jaimee Raymond

Research & Insights
Specialist

jaimee.raymond@aucklandnz.com

