

*Destination Queenstown*

# Winter Strategy 2019

*DQ Connect, February 2019*



*feel the  
inspiration*

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# Overview 2018

## Key Stats June to September 2018

- **Australian Holiday arrivals (IVA)**
  - Queenstown Airport up 1.2%
  - All New Zealand down 0.8%
- **Australian Expenditure (MRTE)**
  - Queenstown 216 million, up 1.4%
  - All New Zealand up 1.8%
- **Commercial Accommodation – International Guest’s Room Nights YoY (CAM)**
  - June -9.2%
  - July -1.9%
  - August -4.4%
  - September 0.2%

# Overview 2018

## Key Stats June to September 2018

- **Total Australian Visitors (Qrious)**
  - Overnight & Day Visitors 156,000 down 0.3%
- **Ski Metrics**
  - Australian Holiday visitors, 15+ years, who claim to ski up 40% YoY (IVS)
  - Skier days up +8% against 2017 to 1.6m visitors to New Zealand ski areas nationally (SAANZ)

# Market analysis

## 1. Increased competition

- Long haul destinations growing in consideration (connectivity, value and desirability)
- Australian ski fields' international alliances resulting in increased investment
- New Zealand landscape increasingly competitive with other regions very active in market
- TNZ regional dispersal mandate diluting marketing investment across all regions

## 2. Changing booking behaviour

- Extended booking windows
- Fragmentation of distribution channels (direct, OTA's, wholesalers, etc)
- Changing in travel styles (AirBnb versus traditional commercial accommodation)

## 3. Reliance on snow conditions

- Good early snow fall impact on bookings

# Winter Campaign Approach

Focus on **brand positioning** to set Queenstown apart from competitors and drive preference, supporting future demand.

## Goals:

- Build Queenstown's brand equity and defend reputation;
- Raise awareness and establish clear unique positioning;
- Inspire potential travellers through a compelling emotive connection;
- Promote brand resilience and sustainable future demand.

## Execution:

- Move from tactical activity to branding piece that supports the full ski season (from winter to spring);
- Evergreen asset allows DQ to be in market earlier and for longer;
- Improved opportunity for partners to align messaging and leverage activity.

# Objectives

## Primary objective

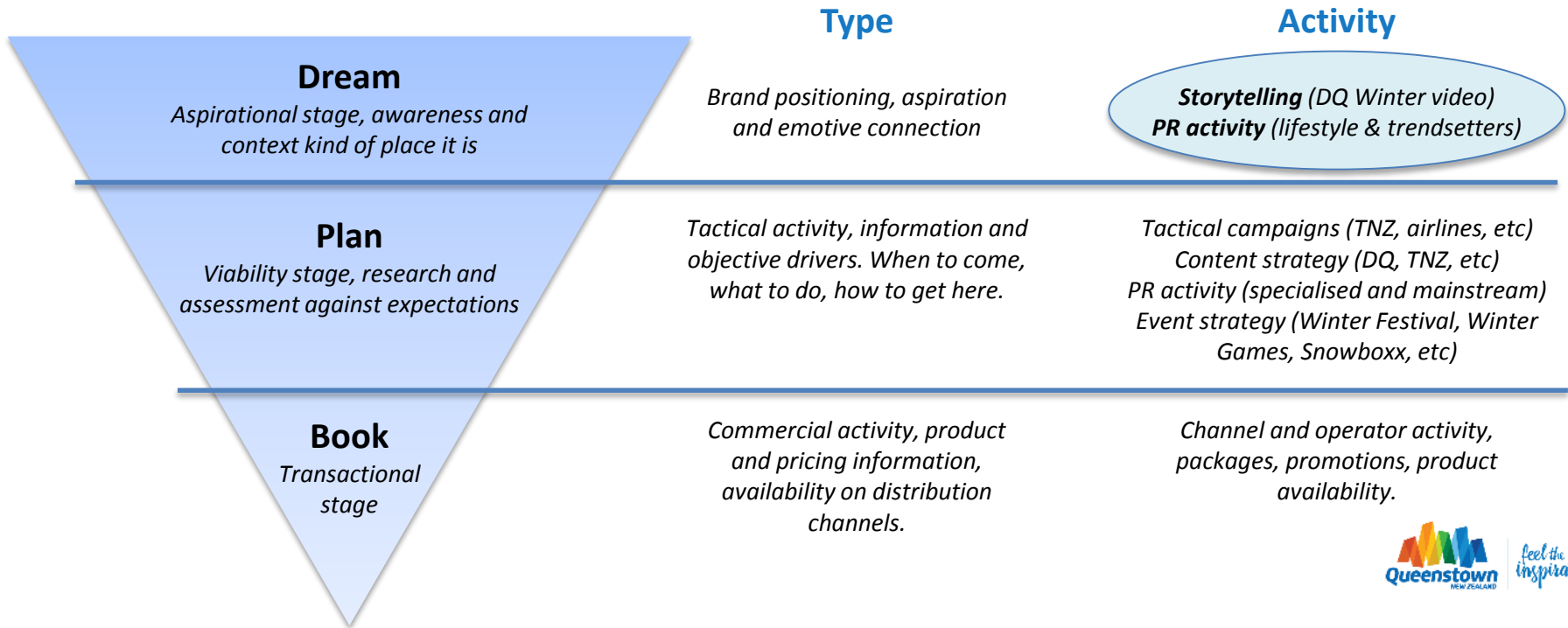
Position Queenstown as the premier winter destination in Australasia, increasing the destination's appeal, effectively communicating our unique selling points and driving preference for a Queenstown winter holiday.

## Secondary objectives

- Grow number of Australian visitors in winter by 4% against 2018
- Grow Australian expenditure in winter by 6% against 2018

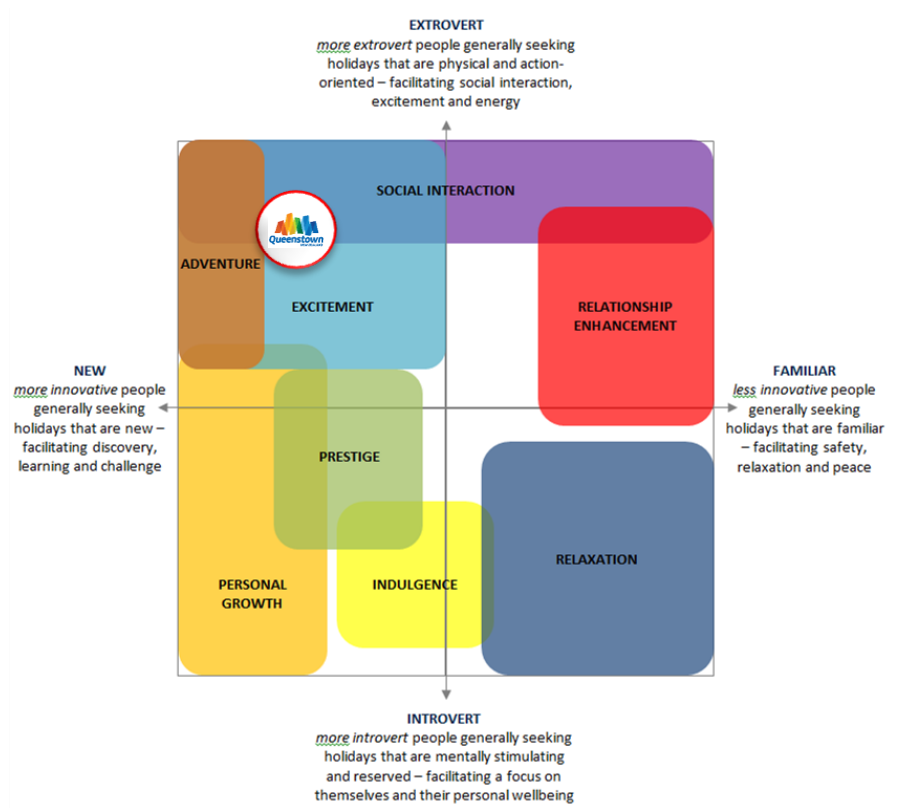
# Consideration funnel

Stages in the consideration process and DQ's focus for 2019:



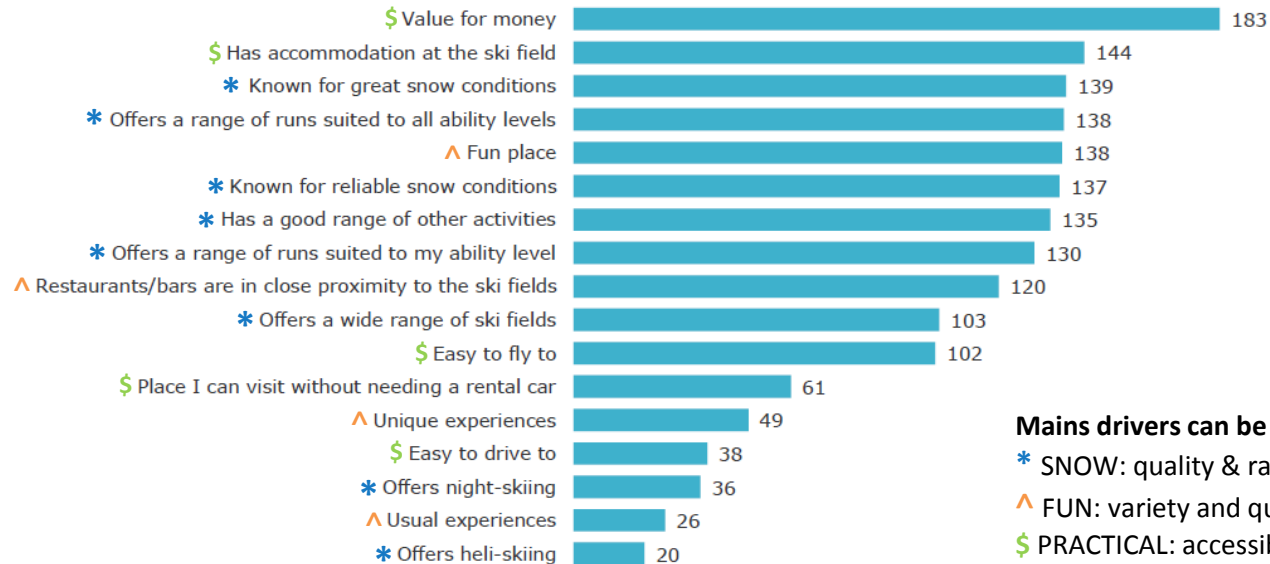


# Queenstown Positioning



# Brand equity drivers

## Drivers of brand equity for international ski destinations<sup>(1)</sup>

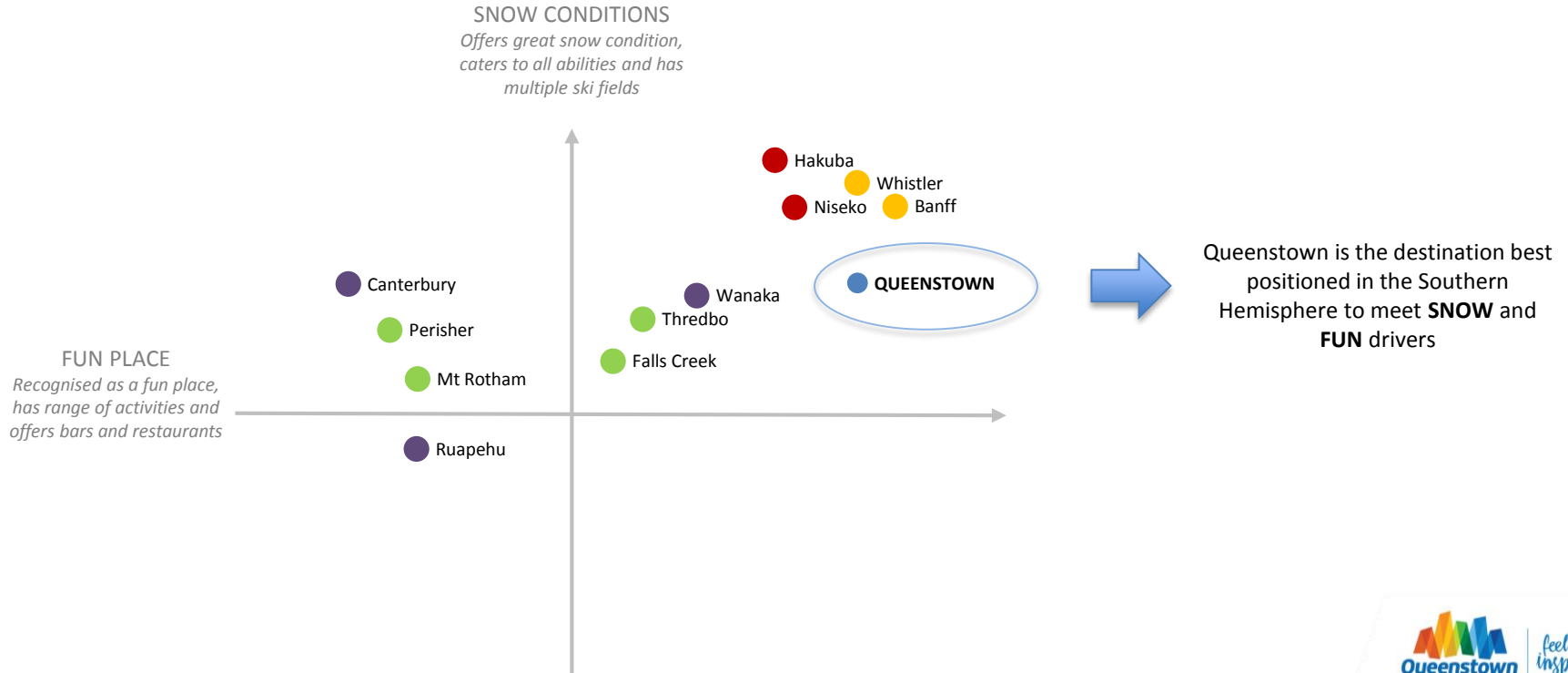


### Mains drivers can be organised in three groups:

- \* SNOW: quality & range of terrain
- ^ FUN: variety and quality of experiences
- \$ PRACTICAL: accessibility and convenience

Source: TNS research 2015

# Competitor matrix



# Target Audience

There are approximately 3 million potential audience in Australia for our ski offering. Our target audience is:

- 25-35yrs
- Single or couples travelling with partner or friends
- Above average HHI
- Based in Sydney, Melbourne, Brisbane and Gold Coast
- Beginners
  - Two thirds of total ski audience
  - More likely to default to Australia as destination of choice
  - “Winter holiday” mind-set vs “skiing holiday”
- Advanced
  - Higher consideration of NZ as skiing destination
  - More likely to book closer to departure based on conditions
  - More days spent on mountain

# Campaign Video

## Objective

Establish Queenstown as a unique winter destination driving preference.

## Strategy

Set Queenstown apart from competitors by showcasing what makes us unique: adventurous destination, epic alpine setting, world-class mountains, fun activities and après ski.

## Creative Insight

Tap into all the fun on offer in Queenstown during winter, showcasing variety of activities and ski fields.

*The wait is over. Welcome to winter.*



# Media Schedule

ACTIVITY	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep
<b>Hero video</b>	Organic channels	Trial phase on paid digital	Optimise and ramp up paid digital	<b>Peak Paid</b> digital plus partner channels	<b>Peak Paid</b> digital plus partner channels	Organic and paid digital	Organic and paid digital	Organic and paid digital	Organic and paid digital	Organic and paid digital	Organic and paid digital
<b>PR</b>	<b>PR event in Sydney</b>				Branded content (paid)	Branded content (paid)		Hosted media & influencers	Hosted media & influencers	Hosted media & influencers	Hosted media & influencers
<b>Always on digital</b>			Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget	Organic, paid & retarget
<b>Events</b>						Winter Festival launch		<b>Winter Festival</b>		Winter Pride ; Winter Games	Winter Pride ; Winter Games;

# Wholesale update



# Wholesale Overview

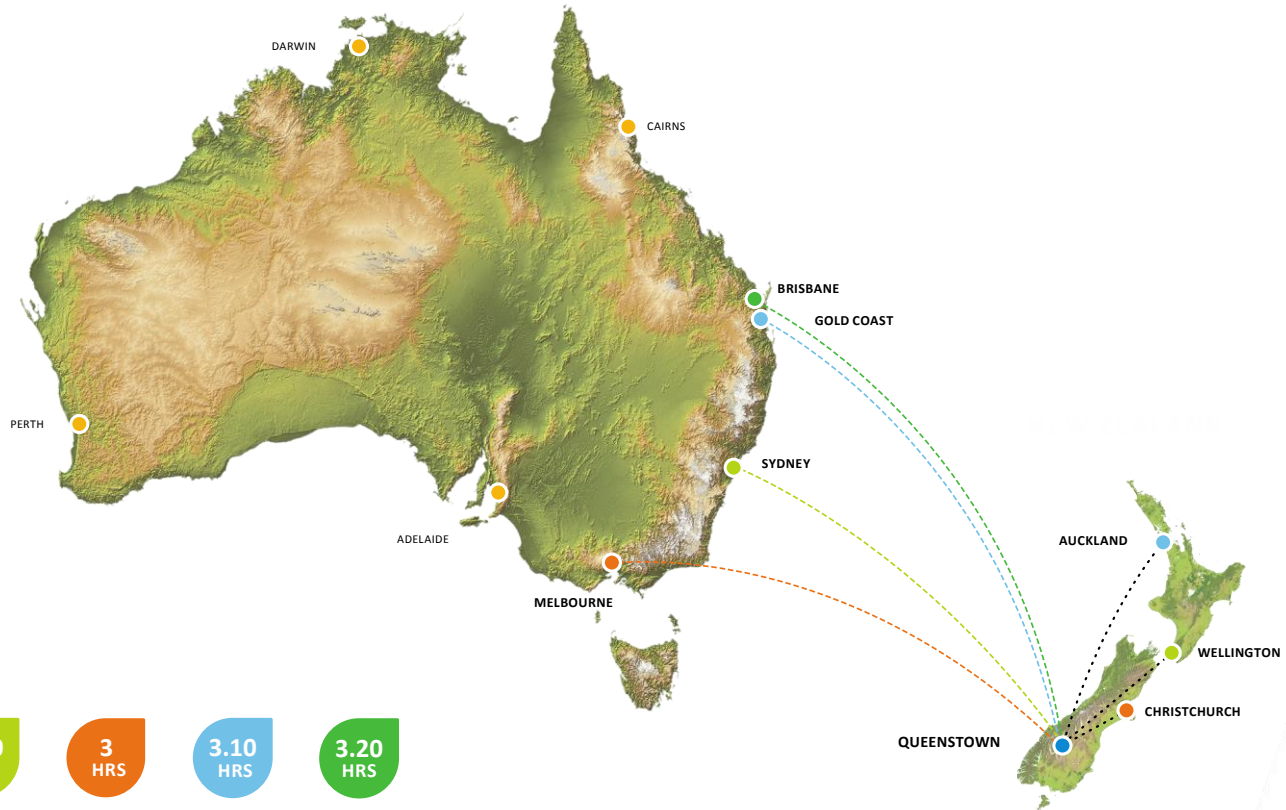
1. DQ Trade Strategy

2. Ski Specialists

- Ski Max, Sno N Ski, Ski Express

2. 2018 overview

# Aviation



APPROXIMATE  
FLIGHT TIMES TO  
QUEENSTOWN

2.40  
HRS  
SYDNEY

3  
HRS  
MELBOURNE

3.10  
HRS  
GOLD COAST

3.20  
HRS  
BRISBANE



# Distribution

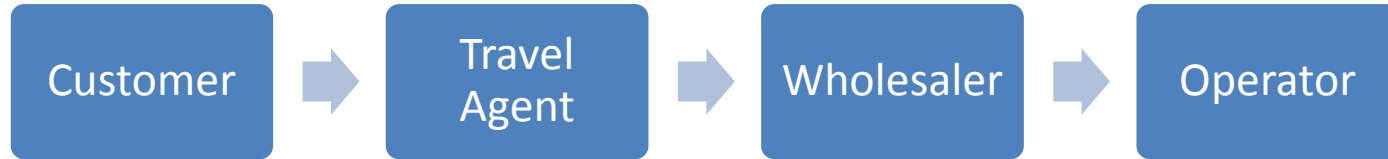
## 1. Booking Behaviour

- Fragmented distribution (Direct, OTA, wholesale)
- Direct selling initiatives and destination awareness

## 2. Ski wholesale growth

- First timer focus
- 70% travel agent & 30% direct

# Wholesale Distribution



# Performance & Outlook

## 1. Early to market

- Price freeze & “super early bird” rates
- Early Southern Hemisphere brochure
- September push

## 2. Competition

- Passes: Ikon, Epic
- North America
- Japan

## 3. NZ Bookings

# Opportunities

- Relationships!
- Get into market: timing, training (reservations, BDMs)
- Early bird rates
- Campaigns: joint campaigns, own campaigns
- Turn first time arrivals into repeat visitors

# Campaign Examples

**SNOWSKI**  
HOLIDAYS
Ski New Zealand '18

<div style="background-color: #002060; color: white; padding: 5px;"> <p style="text-align: center; font-size: 1.2em;">Ski Methven</p> <div style="display: flex; justify-content: center; align-items: center; gap: 10px;">  +  +  </div> <p style="text-align: center; font-weight: bold;">7 NIGHT PACKAGE FROM: <b>\$864</b> pp</p> <p style="text-align: center; font-size: 0.8em;">7 NIGHTS ACCOM   5 DAY LIFT   7 DAY CAR HIRE</p> </div>	<div style="background-color: #002060; color: white; padding: 5px;"> <p style="text-align: center; font-size: 1.2em;">Ski Ruapehu</p> <div style="display: flex; justify-content: center; align-items: center; gap: 10px;">  +  +  </div> <p style="text-align: center; font-weight: bold;">7 NIGHT PACKAGE FROM: <b>\$912</b> pp</p> <p style="text-align: center; font-size: 0.8em;">7 NIGHTS ACCOM   5 DAY LIFT   7 DAY CAR HIRE</p> </div>
<div style="background-color: #002060; color: white; padding: 5px;"> <p style="text-align: center; font-size: 1.2em;">Ski Wanaka</p> <div style="display: flex; justify-content: center; align-items: center; gap: 10px;">  +  +  </div> <p style="text-align: center; font-weight: bold;">7 NIGHT PACKAGE FROM: <b>\$970</b> pp</p> <p style="text-align: center; font-size: 0.8em;">7 NIGHTS ACCOM   5 DAY LIFT   7 DAY CAR HIRE</p> </div>	<div style="background-color: #002060; color: white; padding: 5px;"> <p style="text-align: center; font-size: 1.2em;">Ski Queenstown</p> <div style="display: flex; justify-content: center; align-items: center; gap: 10px;">  +  +  </div> <p style="text-align: center; font-weight: bold;">7 NIGHT PACKAGE FROM: <b>\$1,116</b> pp</p> <p style="text-align: center; font-size: 0.8em;">7 NIGHTS ACCOM   5 DAY LIFT   7 DAY CAR HIRE</p> </div>

Based on 2 adults (kids 10 years & under) 7 nights (Sun - Sat) 7 days 7 nights. Includes 5-day lift pass, 7-day car hire. Subject to change and availability. Tel: 0800 555 555

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Contact your Travel Consultant for more information

## SKI MAX HOLIDAYS



New Zealand Family Package from **\$2,559\*** per fam

7 nights accommodation at Brinkley Resort Methven, 5-Day Mt Hutt lift pass for a family of four - Kids 10 years & under Ski FREE

Enquire Now



the  
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# Q&A



# Thank You



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