

Destination Queenstown

Domestic Trade Marketing Activity and Insights

Report

June / July 2020

Destination Queenstown

PO Box 353, Queenstown 9348, New Zealand
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1. Overview

International border closures by the New Zealand Government and around the world to control the Covid-19 pandemic, has resulted in the loss of approximately 70% of Queenstown's visitor market in the near and mid-term future. While DQ's consumer strategy adapts to unlock the potential within the New Zealand Domestic market, this document provides insights gathered to support the changes in DQ's Trade Marketing strategy to support new market opportunities.

2. Market Background

The domestic market in New Zealand is estimated to be about 29.5 million overnight trips adding up to 83.5 million visitor nights, with an average of 2.84 nights per overnight trip and a total spend of \$23.7 billion, including day trips. For year-ending June 2019, 30% of the total visitor mix to Queenstown was domestic. The New Zealand outbound market is estimated to be 3.2 million trips with 58.8 million visitor nights and a total spend of \$6.5 billion. A significant portion, 78% of the visitor mix, travelled for leisure, with Australia accounting for 60% of all departures. Considering International destinations are not an option for kiwis for the next few months, an opportunity exists for Queenstown to increase market share within the domestic market.

3. DQ's Domestic Trade Marketing Strategy

Objectives

- Promote Queenstown as a key domestic destination to domestic travel advisors for their FIT and Group clients
- To influence and enhance trade partner's consumer-facing Queenstown content via channels including eDMs, website, print collateral, social channels, packages, in-store promos

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- Facilitate new business relationships and thereby expand network of engaged travel advisors for Queenstown but also strengthen the relationships for those operators that already have connections
- Increase general destination and product knowledge of Queenstown with travel advisors
- Collaborate with product managers to ensure any updates of Queenstown operators are shared
- Build strong capability of Queenstown with travel advisors
- Educate travel advisors about the Queenstown proposition in an entertaining and innovative format
- Collaborate with trade partners to establish campaigns encouraging mid-week travel to visit Queenstown to fill the current void

Key messages delivered in Market

- Promote winter as a season that encourages diverse and multiple experiences through leveraging DQ winter campaign assets
 - Queenstown is the place to be this winter, there's never been a better time to visit.
 - Range of activities off-mountain including unique and iconic experiences.
 - Epic powder days, vibrant après ski and an unbeatable range of activities.
- Raise the awareness of the direct flights and the capacity increase, as demand allows
- Promote Queenstown's four season proposition, leveraging DQ's seasonal campaign assets to support retail partner campaigns
- Promote Queenstown's current strong value proposition to encourage previous long-haul travellers to visit
- DQ's post lockdown messages – that Queenstown is open and ready to welcome visitors
- 'Home of Adventure' – It is anchored in our history, our culture and our lifestyle

4. Trade Partner Insights

There is currently no credible information available about the penetration of distribution channels into the domestic market. However, there is a clear strategic move from outbound travel agents in New Zealand to re-focus on the domestic market to keep revenues on and their businesses going.

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Within the domestic travel industry, we have identified the following New Zealand retailers offering prevalent opportunities to leverage DQ's campaign messages; attracting visitors to Queenstown.

- Flight Centre
- House of Travel
- World Travellers
- Helloworld
- First Travel Group (YOU Travel)
- Quay Travel
- Mondo Travel
- NZ Travel Brokers

Flight Centre

Flight Centre New Zealand is a 'household name'. Flight Centre Travel Group, founded in 1982, consists of three brands within New Zealand. Each focus on a slightly different market; Flight Centre (leisure), Travel Managers (experiential) and Travel Associates (luxury). The FCTG accounts for 40% of the New Zealand travel agency market; comprising of owned businesses (33%), plus brands they service throughout the 55 stores nationwide. Competitor brands such as YOU Travel, also purchase through Infinity, the wholesale arm of Flight Centre.

During Alert Level 3 (21 May), Flight Centre indicated they had an 84% increase in search results for travel within New Zealand, with 20% specifically for Queenstown. This resulted in 16 new bookings for Queenstown in one week. Flight Centre have significant scope; looking after outbound, inbound, plus domestic travel. Navigating the new domestic travel landscape is taking some time, however General Manager Marketing NZ Jodie Burnard has identified four key travel segments that will be the focus of campaigns - Food and Wine, Great Outdoors, Family and Ski. The plan is to showcase two segments per week while rotating the combination of the segments.

Research has shown that there are three key decision factors: 1. Safety 2. Security 3. Value. Price is also a consideration undoubtedly but the first three are more important. Value is sought through bundle offering: airfares, accommodation, car hire and activities. Packages had not yet been determined for each segment, at the time we discussed plans with Flight Centre in late May. Flights were unable to be included due to concerns with Air New Zealand media and the Commerce Commission rulings regarding refunds and cancellations. However, with millions of dollars waiting in credit from international travel, conversations had started with Air New Zealand to access

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wholesale domestic fares, which will allow unique and added value offering for consumers and appease consumer anxiety, offering longer time to make a decision. There was optimism around Air New Zealand offering flexi fares also.

There was strong interest in receiving information on which Queenstown operators would be opening once travel was allowed, to help determine what to package together of their preferred suppliers. Further to this, frequent discussions are being had with Tourism New Zealand seeking support. This includes domestic campaign messages encouraging consumers to use commercial businesses over the popular Airbnb and private homes as many New Zealanders are known to use.

Their database has the greatest reach of all the key retailers. [Flight Centre New Zealand](#) reaches approximately 500,000 Kiwis, but collectively the audience totals more than 1.5 million, with the training and wholesale partner Infinity Travel, and broker brands [Travel Managers](#) and [Travel Associates](#). An EDM is sent once a week and Queenstown has been featured as a core destination in recent EDMs. Two core tactics for EDMs are inspirational messages, the second being information on pain points (safety and security). These have been chosen to help give clarity to customers. Campaign strategies will have restricted spend over next six months. Initially, the focus will be on organic content consisting of social media, EDMs, website content including blogs, digital shop displays, then as bookings increase and partnership opportunities arise, TV, Print, Radio will be included.

Flight Centre New Zealand are a 10th the size of Flight Centre Australia. Significant campaign opportunities were highlighted looking ahead to a trans-Tasman bubble arrangement, showcasing the resources, scope and reach that can be utilise when the time is right. Research has indicated that price sensitivity will be more prominent and this will need to be considered by New Zealand suppliers to entice Australians.

House of Travel

House of Travel are a New Zealand owned retail travel company. They are the largest privately owned travel company in New Zealand and the third largest in the Asia Pacific region. Canstar Blue, a New Zealand customer satisfaction research and ratings system, recognised HoT as the top travel agent for 2020. Within the HoT Group

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there are number of different brands and businesses. In addition to the HoT retail stores, within New Zealand Orbit World Travel (business travel) is the largest corporate travel company, and Mix and Match (online branch) is the largest OTA for flight bookings. They also have a 'broker' brand Travel Advocates. The retail stores are a 50/50 partnership between the owner operator and House of Travel. The owner operators and their stores are very active and supported within their local communities.

Several New Zealand suppliers have approached HoT to work directly with them. However, New Zealand Product Manager Angela Webber advised that due to limited team resources, a preferred relationship had been established with ANZCRO to connect with suppliers directly. Furthermore, ANZCRO are negotiating with suppliers to allow House of Travel to promote exclusive packages with more flexibility to provide confidence to consumers and encourage them to book. There was a focus on creating land packages only; accommodation, activities and rental cars. Consumers can then select own airfares or drive if that is their mode of transport. Furthermore, this provided less complexity for agents but was also due to Air New Zealand, at the time, having confirmed schedule until the end of June only and many New Zealanders holding flight credits with Air NZ. As mentioned previously, wholesale rate availability to travel agents are being discussed widely. HoT usually offer their own ski packages. However, going into winter, and to strengthen the partnership with ANZCRO, [ski packages](#) were being created with a focus on beginner only packages; knowing experienced skiers will most likely book direct.

HoT in-house booking system, SPLASH, allows their consultants to book anything offered with their current partners' i.e. dynamic accommodation through Expedia and Hotel Beds, plus DriveAway and Hertz Car Rentals. Navigating the new travel landscape, HoT are considering expanding on the FIT market segment they have previously focused on. Discussions were being held with a few unique luxury wholesalers including coach tours and small groups to create packages to include in the [luxury collection](#). All packages being created are available to all agents within the HoT Group.

One thing they are finding particularly challenging is that there are operators offering their best deals to customers booking directly, which are not commissionable. Plus some operators offering a retail commission, but not a wholesale commission, so therefore these are not available via ANZCRO.

Working closely with Tourism New Zealand, Lauren Kerr has delivered four webinars to between 50-200 HoT staff; consisting of wine and food, luxury, active (cycling and walking) and ski offerings for Queenstown. To compliment these weekly webinars, partner opportunities were made available. Managing Director of ANZCRO Nick Guthrey presented their product range, booking system and commission structure. DQ also presented Queenstown 101 to provide an initial overview before arranging more specifically themed training. A recording is distributed via their intranet for those who missed each webinar.

HoT are communicating domestic packages to their database via a weekly Holidays@Home eDM. This is a positive way to connect/communicate with their customers. HoT is developing '[Holidays@Home](#)' and a [Queenstown](#) specific web page has been created with content. Currently, there are 17 Queenstown packages available and more are added each week. There was an opportunity to discuss a partnership early July.

It is important to acknowledge that HoT Group is not restricted to the domestic market. Further afield, Travel Managers Australia and HOOT Holiday Australia provide additional opportunities once the 'trans-Tasman bubble' is enabled.

World Travellers

World Travellers was founded in 2009. Different to many other travel agencies, World Travellers are co-operative. Each store is independently owned and operated by Kiwis with brokers throughout New Zealand. Audiences vary quite differently between the 23 nationwide stores and each focus on particular regions. Collectively, World Travellers demographics across the stores are 50+ year old female, high income earners, baby boomers, retirees, families and active travellers. Digital & Content Manager Clarissa Hirst advised a significant number of their clients are loyal and will book on average one big trip per year.

Pivoting to the domestic market, World Travellers have a new partnership with Leisure Time Tours for domestic holiday packages, along with wholesaler ANZCRO for ski packages. In Australia, World Travellers use wholesaler Fusion Holidays. Direct contact had been made with most suppliers to gauge who would be open and operating once

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travel was allowed domestically. DQ Member survey results have been shared to give further assistance. World Travellers are seeking to create packages that provide unique product offerings from suppliers.

World Travellers sent out a survey to its database requesting guidance on what type of travel its clients are interested in. Further questions enquired about; duration of travel, who would the travel companions be, and when would domestic travel be done. Result showed active outdoors travel for one week with a partner followed by family and then oneself, and 97% indicated travel would be completed in the next 12 months. September would see a significant number travel, utilising packages that are reasonably priced. September was earlier than usual for that those who usually travel internationally, however, travel restrictions mean people are keen to get out and explore. Queenstown was shown to be very popular as a destination to visit.

One of the smaller retailers with a database of 47,000, World Travellers pride themselves on the local expertise of the travel advisor in each store. Furthermore, the strongest source of new clients is eDMs and WOM. Prior to Covid-19 World Travellers did 2-3 campaigns, however budget restrictions mean only organic content is being created currently. One eDM is sent each week including article content and current deals.

Queenstown was featured using the DQ ski campaign assets in a specific [Queenstown eDM](#), a [social post](#) sharing the ski campaign video and website. A new [Queenstown landing page](#) has been created that hosts deals, things to know and tips from local experts. Social media is a strong channel for World Travellers with each store having their own Facebook page, including World Travellers NZ, which has about 19K+ followers. Other opportunities included a blog and webinar training.

Helloworld Travel

Helloworld in New Zealand was launched in February 2016 as a result of several brands being consolidated, including a selection of the following stores – Harvey World Travel, United Travel stores, and Air New Zealand Holidays. Prior to Covid -19 there were 71 Helloworld Travel Stores in New Zealand. The majority of stores are still operating and reopened for business once New Zealand reached Alert Level 2 in mid-May.

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During the immediate uncertainty, key staff were retained with majority of staff being furloughed during the close-down period, currently until 31 July. Helloworld are very conscious that New Zealanders typically book direct for New Zealand travel. David Libeau, General Manager – Marketing, believes ‘chasing’ the domestic market will be tough. Conversations have begun with the newly appointed Tourism New Zealand General Manager – Domestic, Bjoern Spitzer. David had suggested the need to stop referring to domestic travel, believing it to be more utilitarian and lessens the value of travel especially those who would travel internationally regularly. Messages need to focus on the amazing experiences we can have in our own backyard.

Just prior to lockdown Helloworld produced a 122 page domestic brochure with their preferred wholesaler GO Holidays. Helloworld are only using organic channels such as digital window displays, social channels, website, eDMs and working with RTOs that will support this approach.

On Friday 15 May, in a webinar to Destination Queenstown members, Cam Wallace, Chief Revenue Officer for Air New Zealand, indicated that initial consideration was being given towards ‘bubble’ deals to encourage ‘safe’ travel and enable airline to limit the financial loss of operating at limited capacity. This was an opportunity Helloworld had actively looked at leveraging however that campaign is currently postponed until the issue of Air New Zealand customer credits is resolved.

Helloworld’s marketing strategy is constantly evolving, focusing on predicting market conditions. Currently they host a significant customer database of purely Helloworld NZ based clients. Previously, between February and May, an eDM was sent twice a week with 4-8 tactical deals, however this has now been reduced to infrequent eDMs, mainly engagement and more recently New Zealand holiday product. In addition to this, and through the use of web and social tiles, David had been developing assets ready to promote exploring New Zealand’s backyard to New Zealanders. With zero direct product offerings during early May, content has included updates on stores still being ‘open’ via home based staff, inspiring New Zealanders to travel and engagement through acknowledging key commemorative holidays for example ANZAC Day. Product offerings are added daily including exclusively Queenstown [ski deals](#). Furthermore, an eDM titled ‘Time for a New Zealand short break?’ including five package deals was distributed:

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- Queenstown ski for families and couples
- [Central Otago Rail Trail](#)
- [Southern Alps and Fiord](#)

A prime opportunity to utilise the digital posters in each shop windows, usually displaying tactical deals, was discussed to leverage the DQ ski campaign assets.

Webinar training opportunities were received positively and many agents and product managers (51) completing the DQ's weekly webinar training series for New Zealand travel advisors. David committed to fortnightly progress calls, which has provided Queenstown an opportunity to host 30-40 franchise owners taking part in a Helloworld faml mid-August.

Quay Travel

Quay Travel is a small bespoke travel company focusing on leisure and corporate travel since 1994. An affiliate of Helloworld Travel Group, Quay Travel are proudly 100% New Zealand owned and operated, furthermore, the only New Zealand retailer to be a member of Signature Travel network; encompassing 12 Luxury Lodges of New Zealand. Queenstown properties included in this list are: Blanket Bay, Azur Lodge and recently Sofitel Queenstown Hotel and Spa.

As Quay Travel navigate the new travel landscape, Michelle Malcolm, owner and travel curator, advised they have continued to collaborate with Southern Crossings, having previously booked all the companies flight prior to covid-19. Extending their networks Michelle and her team have reached out to New Zealand Fine Touring. There has been some confusion around whether Southern Crossings and Touch of Spice will pivot to be a wholesaler or retailer. Michelle indicated their preference to use Signature Travel Network properties and Quay Travel preferred suppliers. Following this Southern Crossings and New Zealand Fine Touring would be used where possible. Knowing pricing is a sensitive topic for consumers, Quay Travel acknowledge this will need to be considered when packaging as New Zealand clients will break down a package. Southern Crossings have since provided a three tier structure for [accommodation options](#) in response to Quay travel's need to be competitive on price in the NZ market

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Taking a trial and error approach as a marketing strategy, deals and packages are being driven through organic channels. Quay Travel, although one of the smaller retailers, with a database of 1,000 clients, confirmed bookings is considered one of the top three highest net value retailers. One EDM is sent each Saturday containing a mixture of packages. All EDMs were put on hold initially until the government announced moving to Alert Level 1. Utilising the niche database and other digital channels, and playing to the objective of serving the unique needs of discerning travellers, Quay Travel sent out a survey late May asking clients for input and local tips. The intent was to gather personal recommendations of hidden gems in their client backyard for example the best coffee spots or a great beach for a picnic. These ideas would be used to create new unique itineraries to entice clients to travel. Feedback indicated the South Island was popular but more specifically, less visited destinations like Stewart Island and the Catlins.

To support the weekly EDMs, a '[specials](#)' web page was created to host packages. Currently, there 23 pre-organised packages available. Queenstown is included in nine of these. To promote the packages and ask clients about their intention to travel within New Zealand, Quay Travel contacted all clients who had international travel booked until Christmas. The majority of them said they would like to travel within New Zealand, although Australia is still of interest. Feedback indicated high interest in trying new accommodation and experiences. Using this feedback, clients were provided options that were comparative to what each of them would have spent on their international travel.

Queenstown is positioned strongly for the Quay Travel market. A portion of Quay Travel clients have luxury holiday homes in Queenstown. Seven bookings in one week were confirmed in mid-May.

Although these were for flights these clients will spend on commercial businesses. For example:

- One family has booked a ski holiday, staying at Millbrook for the month of July but will eat out on several occasions and experience other activities that Queenstown offers.
- Three families are hiring a bus to do a tour from Dunedin to Catlins, Stewart Island to Doubtful Sound then to Queenstown for a week. This booking is not entirely high end but there are elements throughout the trip that have been included.
- A couple celebrating a 60th birthday with four other couples were interested in Queenstown.

Furthermore, EDMs have shown to be successful with four high value bookings confirmed as a result.

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All of the Quay Travel team remained for now. In time a restructure will happen. Michelle advised this would be involve splitting into domestic and internationally, however, this would continue to be evaluated. Webinar opportunities were of high interest. A small number of the team did register for Queenstown 101.

First Travel Group / YOU Travel

First Travel Group is an independent travel alliance formed in 1999. Throughout New Zealand, there are 55 well established and independently owned travel businesses. Making up their portfolio is retail, boutique corporate, TMC, and Meeting and Events. Formerly United Travel, YOU Travel is the retail brand of First Travel Group and was launched in 2016. There are 30 stores nationwide, and they pride themselves on being New Zealand's oldest retail brand. Within the group, there are Virtuoso agents that specialise in luxury and experimental travel. The level of expertise required to become a Virtuoso advisor helps First Travel Group achieve the 90% of the repeat and referral business received.

The core focus for YOU Travel is storytelling, making a connection, and the personal travel experiences of the advisors. Kylie Crouch, Marketing and Business Development Manager, advised this focus has come as a result of YOU Travel market demographic of 50+, not restricted by time or budget and book 4-5 star accommodation. YOU Travel have a significant number of generational group enquiries annually, which are still being received now.

As a result of Covid-19, YOU Travel have launched a 'Discover NZ' campaign strategy. DQ ski campaign assets have been utilised to support reconnecting through key segments of family fun, [ski](#), [relaxation](#), [nature](#), [adventure](#), [wine and food](#), and [luxury](#), to capture the domestic market that had previously travelled internationally. One of the medium size database is made up of 40,000 direct YOU Travel clients plus 40,000 non-branded members. One EDM is sent each week. There is also information that is shared regularly through the intranet, which enables members, via an API, to pull and distribute this information through individual channels. An opportunity to drive bookings for Queenstown was discussed and will be explored further.

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Packages are being built on destinations throughout New Zealand purchased via Lifestyle Holidays, Infinity, Virtuoso and other tour companies that specialise in coach touring and special activities. Considering the demographic and multi-generational group enquiries of YOU Travel clients, plus the key segments mentioned, Queenstown is in a strong position to provide diverse offerings to fill the needs of these markets. The various packages are shared through the eDM and digital channels, due to budgets being restricted, for example, currently there are 15 packages on a dedicated [Queenstown webpage](#). Additionally, two blogs have been posted about [Queenstown](#) and [Family Fun](#). Other opportunities include webinar training to the entire First Travel Group team. A ski specific webinar attracted 40 members and the recording was shared also. Media partnerships were presented and will be reviewed when investment allows.

Mondo Travel

Mondo Travel restructured in 2016 to become more broker focused. This allowed the company to be more financially nimble; having minimal overheads and outsourcing all marketing requirements. There are 11 stores nationwide that are 100% New Zealand owned and operated however the brokers are predominately home-based throughout New Zealand and offshore. Tony Terrill, CEO of Mondo Travel, advised one of the top brokers, although based on the Gold Coast, has 90% of clients based in Christchurch or wider South Island. The company structure uses the following wholesalers: Infinity Travel, Moa Trek, Leisure Time Tours, Our World Travel, and Travel & Co (ski only). Webinar training opportunities sit with each of the wholesalers.

One of the smaller retailers in New Zealand, the database is made up 50,000 direct Mondo Travel clients and 50,000 affiliated partners and wholesalers. Similar to other retailers, one eDM is sent per week. Content included are unique experiences that are not offered on the website. The demographics of Mondo Travel clients are 40+ years old, affluent, business class not economy, 4-5 star accommodation, and include a select few activities during each trip, making this database of high net value and a market Queenstown would benefit from. However, Tony advised many have visited Queenstown previously.

An opportunity exists to showcase new unique experiences to entice Mondo Travel clients back to Queenstown. Within the new travel landscape, feedback from an early eDM indicated a Doubtful Sound package, including nights

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in Queenstown had the biggest interest. DQ Ski campaign assets have been shared through multiple eDMs [Cycling & Skiing](#), [Romantic Getaways](#), [Wine, Parks & Adventure](#), and [Skiing, Exploring & Beer Tasting](#) and more specifically the 'Winter Adventure Awaits' ski campaign video was share on [social channels](#). Furthermore, there are currently 17 packages available specifically for [Queenstown](#), each of the packages outline option add-ons to encourage travellers to explore a little further.

An opportunity to create a unique Queenstown eDM, including a chance to win a trip to visit, is being explored. This is accessing a database beyond Mondo Travel's but working in partnership to execute.

NZ Travel Brokers

NZ Travel Brokers is New Zealand owned and operated. Although part of a wide network, providing support and protection, each broker is independent, working to develop personal business opportunities and build client retention. NZ Travel Brokers offer an extensive list of travel related services ranging from leisure, corporate to conference and passport advisory, with over 170 individual brokers throughout New Zealand,. NZ Travel Brokers are a Virtuoso agency, approximately 20 brokers are Virtuoso accredited with a client base who are interested in luxury/high-end experiences. NZ Travel Brokers also operates the Air New Zealand Holidays Travel Brokers brand under licence from Air New Zealand. There are 14 Brokers operate under this brand.

An associate of Helloworld and utilising the cross-sectional reach of ANZCRO also, the priority to book product diverse offerings through these channels enables NZ Travel Brokers the ability to offer competitive pricing for clients. Brokers do have an opportunity to explore rates with suppliers if there is no contract in place through established partners.

Currently, the main focus for brokers is processing of cancellations. Ange Bocock, Marketing Manager, says this will continue for the next few months, although some brokers are proactively marketing domestic product to clients. There is no marketing strategy in place with all campaigns, including activity done on an ad hoc basis. The NZ Travel Brokers database has more than 25,000 subscribers, however each broker has a separate database. Previously eDMs were sent fortnightly. During lockdown, eDMs still continued, offering informative content rather than products and

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deals. In the new landscape, brokers are now asked to opt-in to each eDM, knowing clients base more intimately and what is interested in. DQ ski campaign assets have been shared and included in both packages available on the website – [Ski Sanity Saver](#) and [Family Ski Holiday](#). The first eDM with various spa offerings, alongside wineries, include [Queenstown](#).

In the upcoming months, Ange advised there would be a focus on sports events, spa experiences and October school holidays. An opportunity to provide content and also leverage upcoming DQ spring campaign assets is available. Interest to travel is starting grow as a result of Air New Zealand's announcement of travel credit being accessed over multiple bookings, New Zealand's low number of Covid-19 cases and restrictions on international travel. The brokers are interested in upskilling on New Zealand. The two webinars, Queenstown 101 and Ski & Winter, recording have been requested. Future webinar training opportunities are high and all brokers have been added to the New Zealand travel advisor database to ensure each receive the registration notification for the upcoming webinars. Further to this, an internally weekly newsletter is distributed that provides an opportunity to share additional content.

7. Summary

The travel landscape as we have known it has changed dramatically, beyond what the industry ever imagined possible, as a result of Covid-19. The self-isolation we were thrust into forced everyone to stop and reflect, which resulted in innovation and opportunities for new relationships as we learn how to stimulate domestic travel. Traditionally, domestic travellers default to booking direct with suppliers. However, domestic channel partners can play a role in rebuilding the tourism economy, and potentially increasing the pre-Covid 30% domestic visitor market to fill the void left by international visitors.

The travel and tourism landscape will continue to evolve as New Zealand adapts to a new global environment. Below are the key insights gathered through discussions with the key retail partners.

- There is a clear strategic move from outbound travel agents in New Zealand to re-focus on the domestic market, however, this is of concern that New Zealanders will still predominately book directly with suppliers even after seeing a package.

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- Domestic travellers are seeking value through packages, including experiences that cannot be found on 'the shelf'. Furthermore, developing domestic products that are priced for the domestic market needs to be considered. This will also help protect their international product offering when off-shore markets return.
- Operators need to showcase what can be offered that domestic travellers cannot be experienced internationally. There is strong interest from Kiwis who are time poor who want a 'one stop shop' for packages that offer value to fulfil the Australian holiday gap.
- Popular itineraries include Ski, Family, Adventure, Food & Wine, 'Bucket List' experiences
- There is some anxiety regarding travelling. A key focus is the messages being communicated to customers to help appease this.
- Budgets have been restricted with a focus on organic content only for the next 6 months.
- Travel advisors are keen to upskill and learn more about destination offerings
- Queenstown is in a prime position to attract the 50+ years old market who have disposable income and travel internationally
- Trade ready products are seeking changes in payment policies
- High value domestic visitors are using travel advisors to book domestic packages that including spa, golf and wine
- Forward demand is healthy for school holidays, weekends, however, there is a need for a value driven mid-week proposition
- Opportunities exist to deepen the product knowledge of travel advisors from the key retail partners.

Activity Outcomes

The DQ trade team has been working to build and strengthen connections with travel advisors in New Zealand, sharing the Queenstown story and that we are open. A new webinar series was launched 18 June, intended to provide an opportunity to engage with travel advisors and what offerings Queenstown has for their clients. Through a number of touch points, DQ has more than doubled (+58%) its domestic trade contacts.

DQ Activity	TOTAL
DQ eDM (Winter Remarks) distribution	746 contacts

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Webinar Training engagement	536 participants
Additional Trade Contacts	428 new contacts

In partnership with Air New Zealand, at the end of July, the DQ Trade team will host nine key trade partners on a famil to showcase the best in Queenstown to enhance Queenstown's profile within each company's product portfolio. Below is the list of participants that will be involved with the famil.

Name	Company	Position
Sian Cribbens	Flight Centre	National Campaign Manager
Michelle Malcolm	Quay Travel	Managing Director
Kylie Crouch	First Travel Group (YOU Travel)	Marketing & Business Development Manager
Tony Terrill	Mondo Travel	Chief Executive
Mark Kennedy	Air New Zealand	Sales Manager
Angela Webber	House of Travel	NZ Product Manager
Clarissa Hirst	World Travellers	Digital & Content Manager
David Libeau	Helloworld Travel	General Manger Marketing
Jessica Holmes	STA Travel	Product Manager

Leveraging the DQ Ski campaign that was launched on Sunday 30 May, a toolkit of assets were shared through the various retail partner channels. There were no previous benchmarks for each channel, however, feedback received has indicated that as a region Queenstown is the top preforming destination.

Channel	TOTAL
Retail partner eDMs (Queenstown centric)	16
Social Channel Posts	33
Website Landing Pages	11
Queenstown Deals	62
Online Article Content	10

Reach of key trade partners

Retail Partner	Database/Membership	Frequency
Flight Centre	500,000 FC, 1.5 million including Infinity + Brokers	1 per week
World Travellers	47,000	1 per week
Helloworld	200,000	1 per week
First Travel Group (YOU Travel)	40,000 YOU Travel + 40,000 non-branded members	1 per week
Quay Travel	1,000	1 per week
Mondo Travel	50,000 + 50,000 with affiliated partners and wholesalers	1 per weeks
NZ Travel Brokers	25,000	Adhoc
TOTAL	1,953,000	8 opportunities per week

DQ Webinar Training

Date	Webinar Topic	Registrations	Live viewers
Thursday 18 June	Queenstown 101	167	111
Thursday 25 June	Winter & Ski	107	101
Thursday 2 July	Food & Wine	117	86
Thursday 9 July	Luxury	70	38
Thursday 16 July	New Product	Still to register	Still to deliver

Electronic Direct Mail (eDM)

Company	Link
Flight Centre	Kiwi Escapes - NZ Ski Escapes
	Escape to Queenstown
	Top 10 experiences of the week
Travel Associates (FC Group)	Keep Dream of Incredible Queenstown
Travel Managers (FC Group)	Treat yourself to a Queenstown Adventure
House of Travel	Luxury Retreats + Bay of Island backyard secrets
	Adventure packages + Rotorua backyard secrets
	Explore New Zealand by Motorhome
World Travellers	Discover Queenstown This Winter
Helloworld	Time for a New Zealand short break?
First Travel Group (YOU Travel)	YOU Discover Queenstown

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Quay Travel	Experience Luxury in New Zealand
Mondo Travel	Explore NZ - Romantic getaways to adventure!
	Explore NZ - Cycling & Skiing...and a little luxury!
	Explore NZ - Wine, Parks, Adventure, Fishing & More
	Explore NZ - Fishing, Skiing, Exploring or Beet Tasting?

Reach: 2.1 million

Social Channels

1. Facebook

Company	Link
Flight Centre	Ski packages
	The Ultimate Guide to Planning a New Zealand Ski Trip
	Kiwi Escapes
	5 Days in Queenstown - how to plan the best family adventure!
	Top 5 activities to do in New Zealand if you love the big outdoors!
Travel Associates	Keep Dream Incredible Queenstown - The Helicopter Line
	Keep Dreaming Incredible Queenstown - Over The Top Golf
	New Zealand's most luxurious stays
World Travellers	Are you gearing up for ski season?
	Winter Adventure Awaits
	Girls' weekend in Queenstown
	Queenstown Golf Experience
	Girls' Weekend at The Rees Hotel Queenstown
First Travel Group (YOU Travel)	Remarkable Queenstown
	Gibbston Valley Lodge & Spa, Queenstown
	Will you be hitting the slopes this winter?
	Hilton Queenstown unforgettable experiences!
	Family Fun in Queenstown
	Peppers Beacon & iconic sights!
	Couples Luxury Ski Break
Quay Travel	Can't wait to book the ski holiday!
	Queenstown Specials
Mondo Travel NZ	Attention Golfers
	Winter Adventure Awaits
	Explore NZ - Fishing, Skiing, Exploring or Beer Tasting?

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	Explore NZ - Wine, Parks, Adventure, Fishing & More!
	Explore NZ - Cycling & Skiing ... and a little luxury!
	Explore NZ - romantic getaways to adventure!

Reach: 438,166 page likes for all retailers

2. Instagram

Company	Link
Flight Centre	Ski packages
	Winter Adventure Awaits
Quay Travel	Queenstown - Azur Lodge

Reach: 11,758 followers

3. YouTube

Company	Link
Flight Centre	Kiwi Escapes - Ski Escapes
	Queenstown - Winter 2020

Reach: 823 subscribers

Other Digital Platforms

1. Website, Deals and Article Content

Company	Link
Flight Centre	Queenstown Holidays
	Queenstown - Travel Guide
Travel Associates (FC Group)	Queenstown
Travel Managers (FC Group)	Queenstown Getaway
TravelSmart (FC Group)	Your Queenstown Adventure
House of Travel	Queenstown & Otago Holiday Packages
World Travellers	Queenstown
Helloworld	New Zealand Holidays
First Travel Group (YOU Travel)	Queenstown
Mondo Travel	Queenstown Holidays
NZ Travel Brokers	Queenstown

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2. Queenstown Deals

Company	Link
Flight Centre	Holiday Packages for Queenstown
	Kiwi Escapes
Travel Associates (FC Group)	Queenstown offers - 19 available
Travel Managers (FC Group)	Queenstown Ski Holiday
	Queenstown - Food and Wine Escapes
	Great Outdoor Adventures
House of Travel	Ski Packages
	Luxury Collection
	Active Holidays
	Family Breaks
	Food & Wine
World Travellers	Queenstown Deals - 10 available
Helloworld	Queenstown Deals
First Travel Group (YOU Travel)	Queenstown - Our Latest Deals - 15 available
Quay Travel	Quay Travel Queenstown Specials
Mondo Travel	Queenstown Packages
	Ski Queenstown
NZ Travel Brokers	Backyard Collection - Queenstown Wineries
	Queenstown Ski Holiday
	Queenstown Family Ski Holiday
	Queenstown Breaks in 2020-21

3. Article Content

Company	Link
Flight Centre	5 days in Queenstown - how to plan the best family adventure
	Top 5 activities to do in New Zealand in you love the big outdoors!
	The Ultimate Guide to Planning a New Zealand Ski Trip
	Plan a New Zealand holiday the teens will want to go on
	A guide to New Zealand's equiste food and wine scene
Travel Associates (FC Group)	Keep Dreaming of Incredible Queenstown
House of Travel	9 incredible Queenstown Experiences
World Travellers	Things to see and do in Queenstown this winter
First Travel Group (YOU Travel)	Family Fun in Queenstown
	Remarkable Queenstown

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The plan moving forward

The travel and tourism landscape will continue to evolve, and New Zealand seeks to adapt to the new pandemic environment. DQ's trade team will continue to connect and nurture relationships with each retail partner.

Opportunities will be sought out to support and leverage DQ's consumer activity.,

The new webinar series offering weekly webinar training to all New Zealand travel advisors that started on Thursday 18 June will continue. We have five scheduled, with our two webinars presenting Queenstown 101 and Ski & Winter having 165 and 107 registrations respectively. Opportunities to provide direct webinar training to each retail partner has been explored and will continue to be discussed as the landscape changes.

In July, and in partnership with Air New Zealand, the DQ trade team will host a select group of key retail partners for a Queenstown famil. This will provide an opportunity to showcase Queenstown as a key destination for FIT and group travel, and help increase the local economy for the foreseeable future.

8. Sources and References

The DQ Trade team spoke with the following people to gather insights to support and execute the domestic strategy.

- Jodie Burnard – General Manager Marketing NZ, Flight Centre
- Angela Webber – Product Manager, House of Travel
- Clarissa Hirst – Digital & Content Manager, World Travellers
- David Libeau – General Manager – Marketing, Helloworld
- Kylie Crouch – Marketing & Business Development, First Travel Group (YOU Travel)
- Michelle Malcolm – Owner, Quay Travel
- Tony Terrill – CEO, Mondo Travel NZ
- Ange Bocock – Marketing Manager, NZ Travel Brokers

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Appendix

Below is a selection of supporting work showcasing the various campaigns from each of the key retailers DQ trade team has spoken with. Included also are some useful links for more industry insights.

A. Creative Examples

Examples of eDMs

Travel Associates



YOU Travel

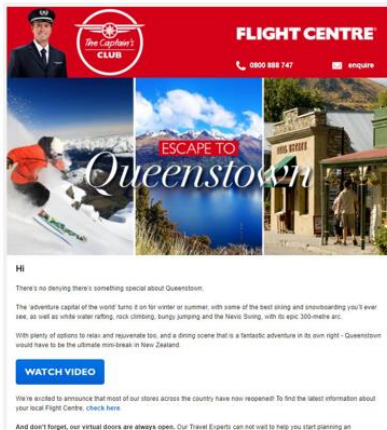


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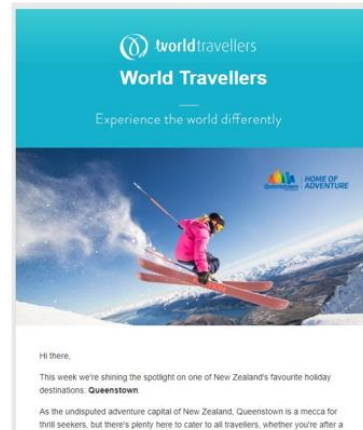
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Examples of eDMs

Flight Centre



World Travellers



Examples of digital shop screens

Flight Centre

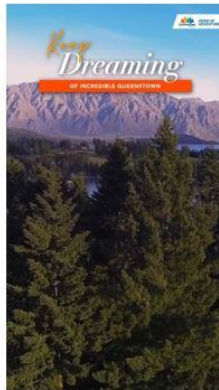


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Examples of Digital Shop Screens

Travel Associates New Zealand



Travel Managers

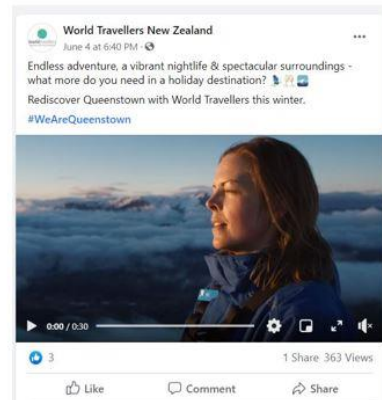


Examples of Social Media Posts

Travel Associates New Zealand



World Travellers New Zealand



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Examples of Social Media Posts

YOU Travel



YOU Travel



Examples of Landing Pages

World Travellers New Zealand



Travel Managers



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Examples of Deal Pages

World Travellers New Zealand

Queenstown Ski Holiday

A Queenstown Ski Sanity Saver



5 nights from \$619
per person (twin share)
SALE ENDS 30 June 2020

[CONTACT YOUR LOCAL BROKER TO BOOK NOW](#)

- 5 nights motel accommodation in Queenstown
- 4-day Earlybird Queenstown Lift Pass for use at Coronet Peak or The Remarkables

Travel dates: 26 June - 27 September 2020

Terms and Conditions

Prices are per person, twin share unless advised otherwise and subject to availability. Prices were correct at time of submission (QJN20) but are subject to change without notice. Bookings must be confirmed & paid in full by 30 June 2020. Advertised price valid for travel 26 June - 27 September 2020. Discounts or surcharges may apply for travel outside of this period. Ski product included in packages are non-refundable. Ski season and conditions vary from year to year.

Inclusions

5 nights motel accommodation in Queenstown 4-day Earlybird Queenstown Lift Pass for use at Coronet Peak or The Remarkables

YOU Travel

The screenshot shows the YOU Travel website with a navigation bar at the top. The main heading is "Queenstown". Below it, there's a "New Zealand" section with a list of destinations: Invercargill, Auckland, Rotorua & Taupo, Hawke Bay & Gisborne, Wellington & Marlborough, Nelson & West Coast, Canterbury, Otago/South Island, Christchurch, Dunedin, Invercargill, and Auckland. To the right, under "Our Latest Deals", there are three featured deals, each with a thumbnail image and a brief description of the package and price.

Examples of Deal Pages

Flight Centre

The screenshot shows the Flight Centre website with a section titled "Coronet Peak & The Remarkables". It lists three deals, each with a thumbnail image, a brief description, and a price. The first deal is "Ramada Suites by Wyndham Queenstown + 3 Day Coronet Peak / Remarkables" for \$739. The second deal is "Pipers Beacon Queenstown + 3 Day Coronet Peak / Remarkables" for \$825. The third deal is "Heritage Queenstown + 3 Day Coronet Peak / Remarkables" for \$855.

Helloworld

The screenshot shows the Helloworld website with a section titled "DEALS: 20 found". It lists five deals, each with a thumbnail image, a brief description, and a price. The first deal is "QUEENSTOWN | DOUBLETREE BY HILTON, QUEENSTOWN (Hotels)" for \$359**. The second deal is "QUEENSTOWN | HIDDEN QUEENSTOWN (Hotels)" for \$435**. The third deal is "QUEENSTOWN | AZUR, QUEENSTOWN (Hotels)" for \$1,459**. The fourth deal is "QUEENSTOWN | NUGGET POINT (Hotels)" for \$425**. The fifth deal is "CONTIKI | RHYTHM AND ALPS (MULTI SHARE, START QUEENSTOWN, END QUEENSTOWN) (Tours)" for \$994**.

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Examples of Website Banners

Travel Associates New Zealand



B. Useful links for more industry insights

Bjoern Spitzer [TNZ – Kickstarting Domestic Tourism](#)

Destination Queenstown [Domestic Winter Campaign Research](#)

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