

DQ Member Update

June 13th 2019

Agenda



Government & National update

Queenstown performance

DQ winter campaign update

Winter Festival – Rae Baker

DQ Sustainability programme

Visitor Levy – QLDC Mayor Jim Boulton

Government & Industry



Government Tourism Strategy

Tourism NZ - visitor profiles

TIA Tourism 2020 & Beyond

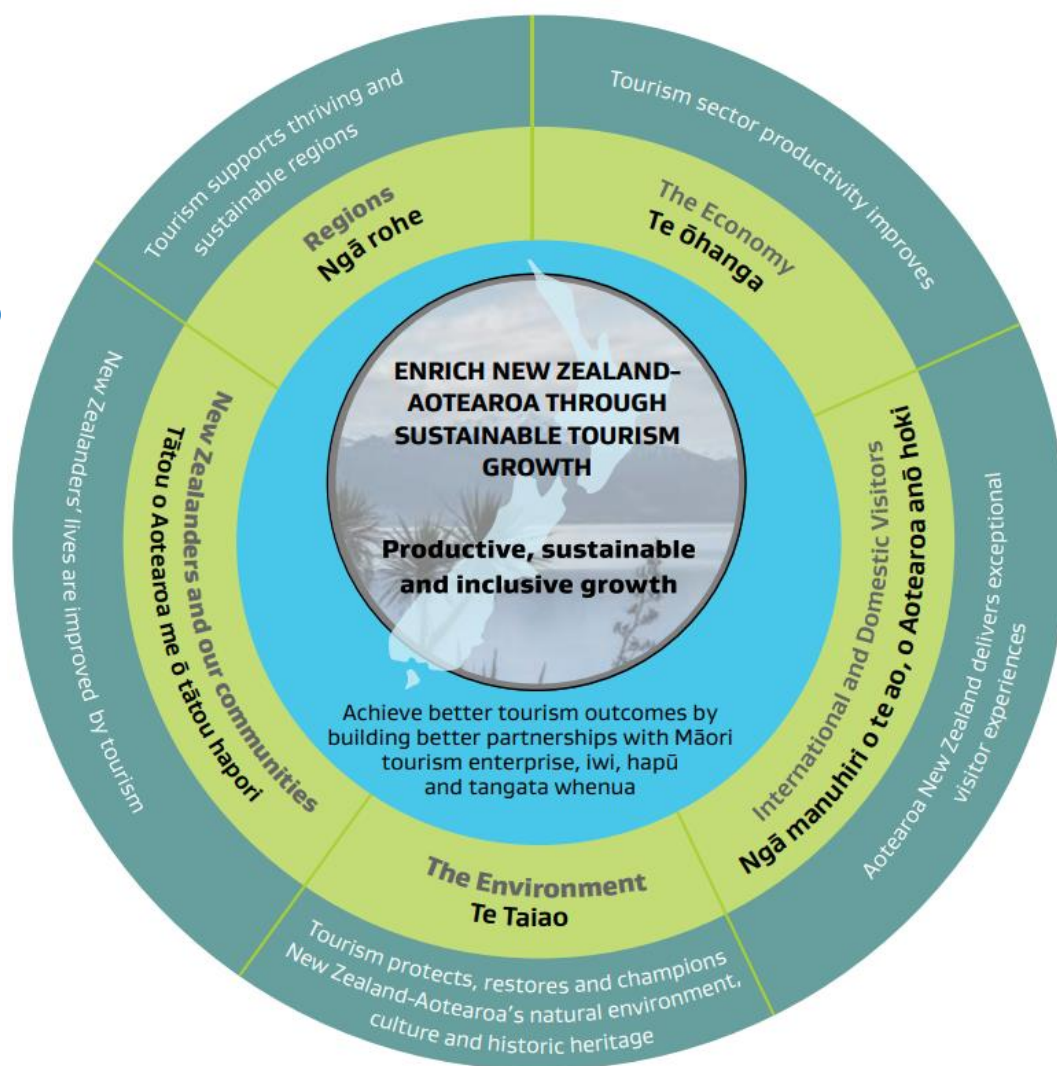
International visitor arrivals

MBIE Tourism forecasts

Government Tourism Strategy



Goals & Outcomes



Top Priorities for 2019/20

- Co-ordination across the tourism system
- Long-term sustainable funding mechanisms
- Destination management and planning
- Better data and insight



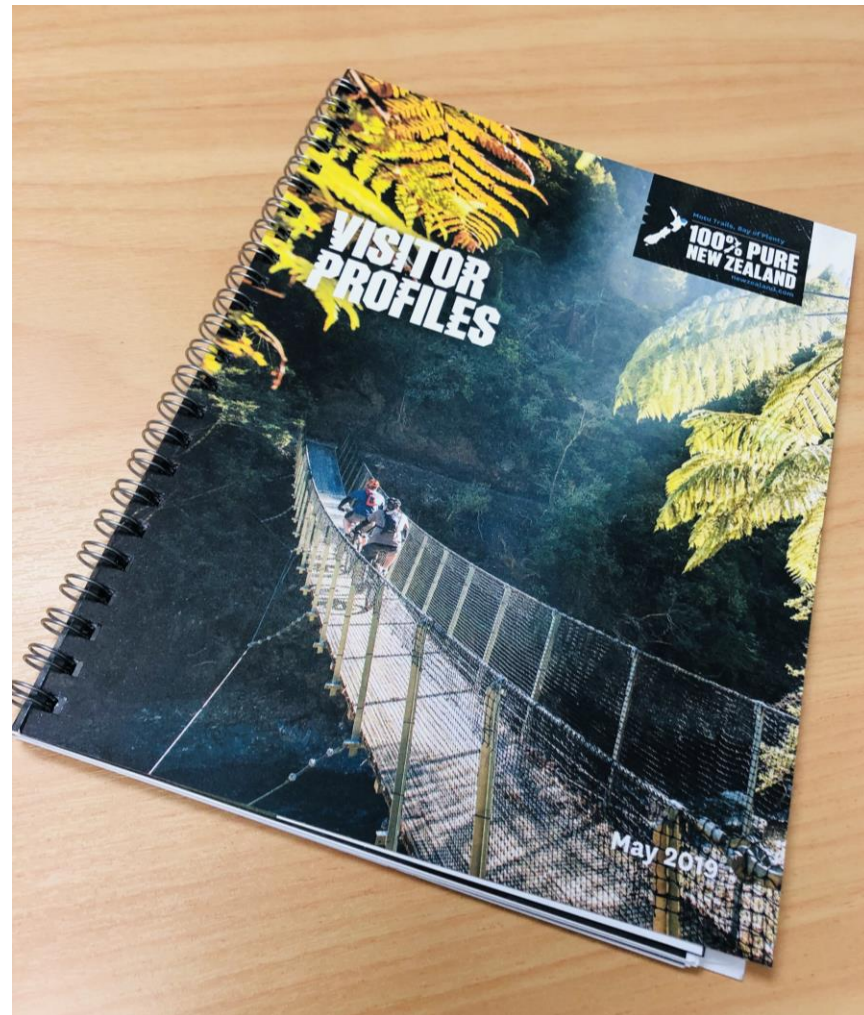
Destination Management



International Visitor Levy & ETA



International Visitor Profiles



Tourism NZ - Visitor profiles tool

Visitor Profile Tool

Want to know which visitor market best suits your tourism offering? Or have an idea for a new tourism product or experience and want to know where to target your marketing? Try our Visitor Profile tool to find out which high-value visitors from our six key visitor markets are the best match for your product.

Evaluate your business

BUDGET _____ ● _____ **LUXURY**
What is the perceived cost and/or quality of your product?

CITY _____ ● _____ **NATURE**
Is the environment of your product more urban or natural?

OBSERVE _____ ● _____ **IMMERSE**
What level of participation does your product require from visitors?

INDIVIDUAL _____ ● _____ **GROUP**
Is your product better suited to an individual/couple or to a larger group?

RELAXATION _____ ● _____ **EXCITEMENT**
What's the adrenaline level of your product?

STRUCTURE _____ ● _____ **SPONTANEOUS**
How far in advance do visitors need to book your product?

Note: This tool is designed to be used as a guide only. The results are based on free and independent travellers, specifically independent professionals from Australia, China, USA, UK, Germany and Japan. These visitor profiles were created using research from Tourism New Zealand and Auckland Airport and official data. For more detailed information about our visitors, visit the Research section of our website.

Find out which markets best suit your product

www.tourismnewzealand.com/visitorprofiletool



Example

Visitor Profile Tool

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[Find out which markets best suit your product](#)

Your matches

Here are the markets best suited to your product based on the info you provided. To find out more about these markets, click below to meet some of our high-value visitors.



Note: This tool is designed to be used as a guide only. The results are based on free and independent travelers, specifically independent professionals from Australia, China, USA, UK, Germany and Japan. These visitor profiles were created using research from Tourism New Zealand and Auckland Airport and official data. For more detailed information about our visitors, visit the Research section of our website.

[Visit our Research page](#) for more information about our international visitors

[Have another go](#)

German visitor profile



STEFAN'S TRAVEL PREFERENCES

BUDGET

Stefan and his partner will spend time camping, traveling in a rented vehicle and staying in good quality hotels.

CITY

New Zealand has been a desired destination for some time. He wants to see the beauty that New Zealand is known for.

OBSERVE

Hiking and exploring in nature are activities that Stefan and his partner are very interested in.

INDIVIDUAL

They want to travel freely without worrying about other people's schedules.

RELAXATION

They want to see and do all that New Zealand's natural landscape has to offer, including hikes and visits to national parks.

STRUCTURE

They will likely plan all details of their holiday themselves.

"I love getting off the beaten track to feel like I'm experiencing nature in New Zealand as it should be - untouched and natural. It allows me to relax and reconnect."

Insights produced from Tourism New Zealand research, Auckland Airport research and official data sources

GERMAN VISITOR FACTS

56%
under 35

20%
university educated

15%
household income
above €48,000



TOP PREFERRED COUNTRIES TO VISIT:

New Zealand
Australia
Canada
USA

WHY NEW ZEALAND FOR STEFAN?

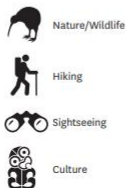
Stefan and his partner have been dreaming of visiting New Zealand for a while. Many of their friends and family have visited and say it's a beautiful country. He wants to see the natural beauty New Zealand is world famous for. Hiking and exploring in nature are activities that Stefan and his partner are most interested in, and is what drew them to New Zealand.



DESIRES FOR MY HOLIDAY:

Completing some of the Great Walks and visiting National Parks. Stefan and his partner are highly interested in understanding and learning about Māori culture; and will visit several landmarks of Māori significance including the Waitangi Treaty Grounds.

TOP ACTIVITIES



LIKELY ITINERARY



OUTLINE OF STEFAN'S NEW ZEALAND HOLIDAY



STEFAN'S EXPERIENCE AS A FREE INDEPENDENT TRAVELLER (FIT) TO NEW ZEALAND:

- Stefan and his partner are most excited about spending a few nights in the Franz Josef area as well as near the Nelson Lakes National Park
- They are less interested in adventure activities or 'tourist attractions' like bungy jumping - and more excited about day walks
- They are planning on exploring the geothermal attractions while in Rotorua
- They're also planning on joining a scenic boat tour, hoping to see whales and dolphins
- Learning about Māori culture is another highlight for them and they plan on visiting several landmarks of Māori significance including the Waitangi Treaty Grounds
- On some of their more relaxed days they'll visit places like Te Papa and the Auckland Art Gallery.

WHAT MAY IMPROVE STEFAN'S VISITOR EXPERIENCE?

- Clear information and signage about camping rules and requirements
- Informational list of less popular regional hiking tracks - the hidden gems
- More guidance on where and how they can experience New Zealand culture.



New campaign launch Monday 17th

**100% PURE
NEW ZEALAND**

TOURISM 2025 & BEYOND



A SUSTAINABLE GROWTH FRAMEWORK
KAUPAPA WHAKAPAKARI TĀPOI

Tourism 2025 & Beyond



Tourism 2025 & Beyond

A Sustainable Growth Framework Kaupapa Whakapakari Tāpoi

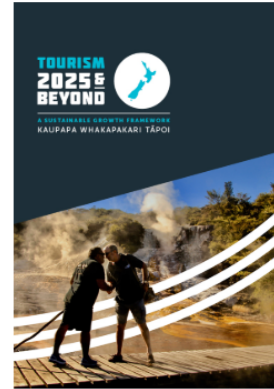
Our Vision

Growing a sustainable tourism industry that benefits New Zealanders

[Tourism 2025 and Beyond](#) provides a clear pathway towards a sustainable tourism industry for Aotearoa New Zealand.

Released in May 2019, the framework has evolved from the industry's original Tourism 2025 Growth Framework and now has sustainability firmly at its heart.

It keeps the tourism industry's focus firmly on growing our value to individuals, communities, the environment, the economy and our visitors.



Framework Elements	Goals & Actions	Measuring Progress	Tourism Today
New Influences	Tourism 2025 Evolution	Government Alignment	FAQs
Tourism Sustainability Commitment	People & Skills 2025	Tourism Insight Framework	



Sustainability at the heart



Goals

VISITOR

GOAL Deliver outstanding visitor experiences

MEASURE International and domestic visitor satisfaction of 96%



Measurement source: International Visitor Survey and Angus & Associates Visitor Insight Programme

ENVIRONMENT

GOAL Aotearoa is enhanced by tourism

MEASURE 90% of tourism businesses have environmental plans to measure and reduce their carbon, waste and ecological footprint

CURRENT LEVEL Not available at present. To be measured through TIA's annual TSC survey

Measurement source: Tourism Sustainability Commitment Survey

COMMUNITY

GOAL New Zealanders are welcoming hosts

MEASURE 90% of New Zealanders are happy with the level of tourism and support growth



Measurement source: Mood of the Nation Survey

ECONOMIC

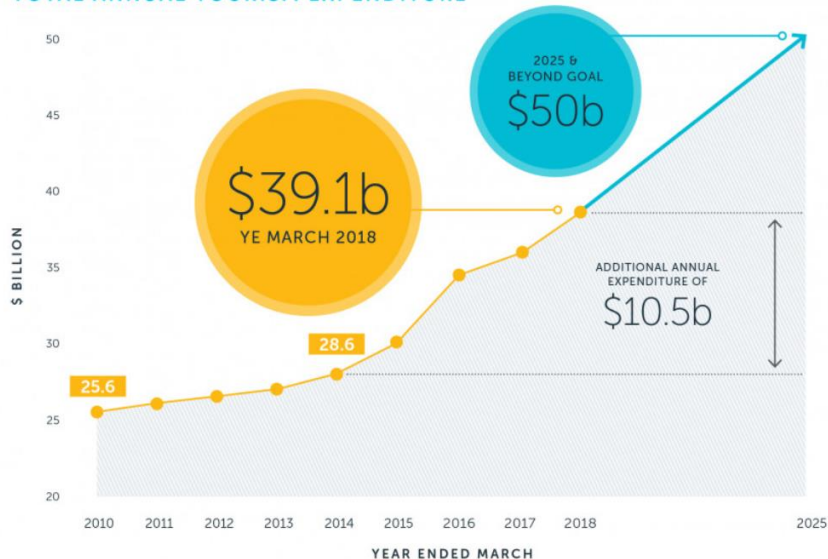
GOAL Grow tourism's contribution to New Zealand's economy

MEASURE Annual tourism spend of \$50 billion by 2025



Measurement source: Tourism Satellite Account

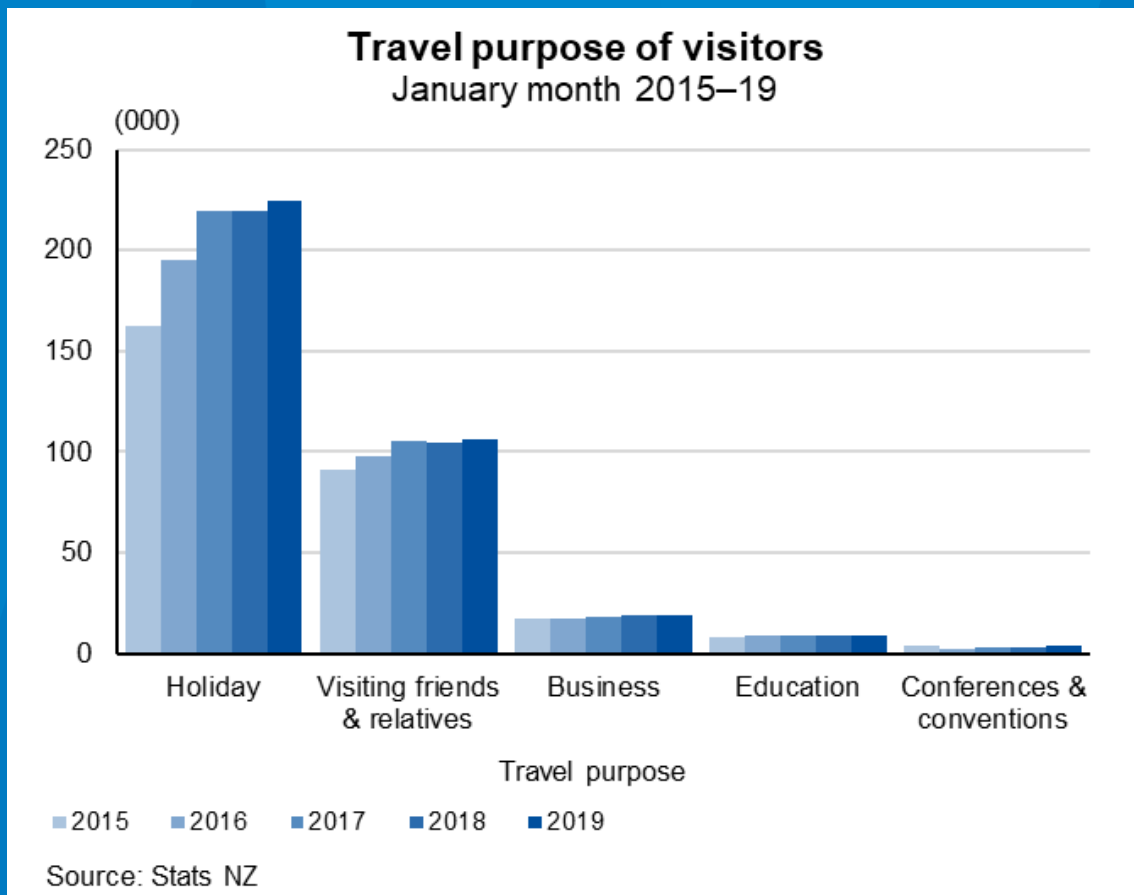
TOTAL ANNUAL TOURISM EXPENDITURE



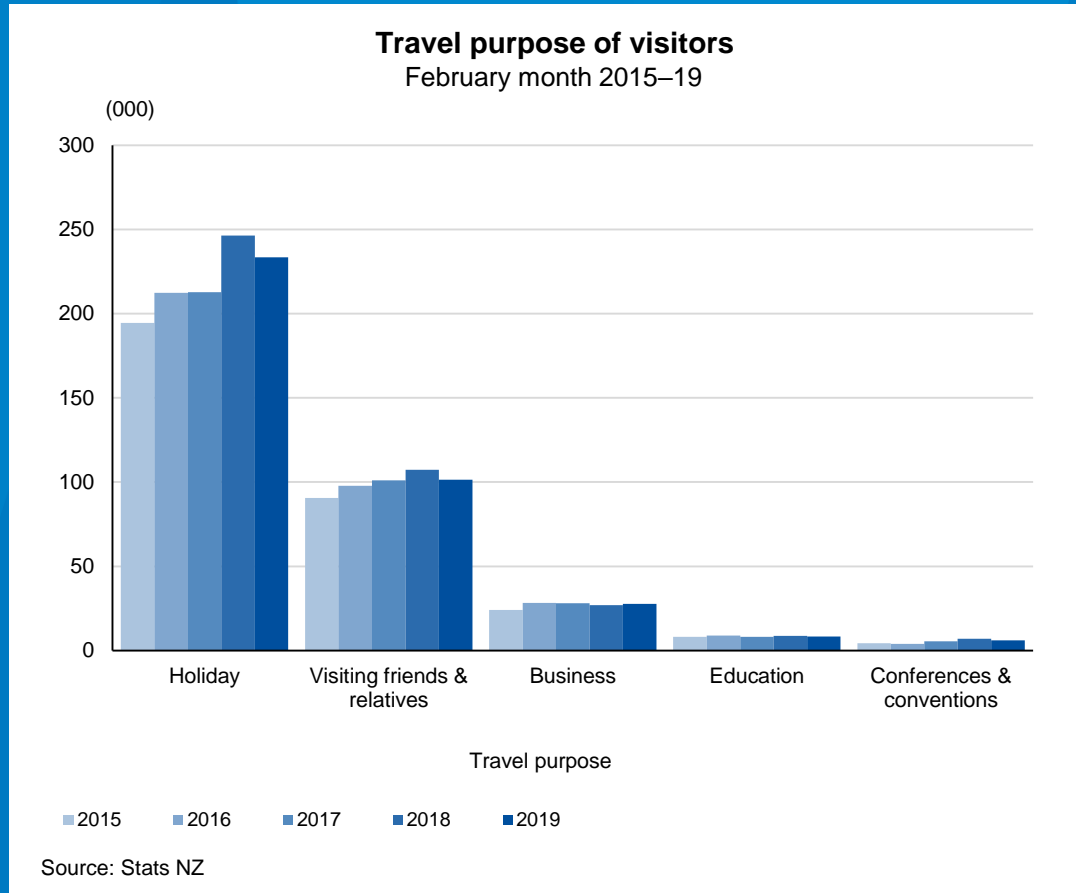
International Visitor Arrivals - NZ



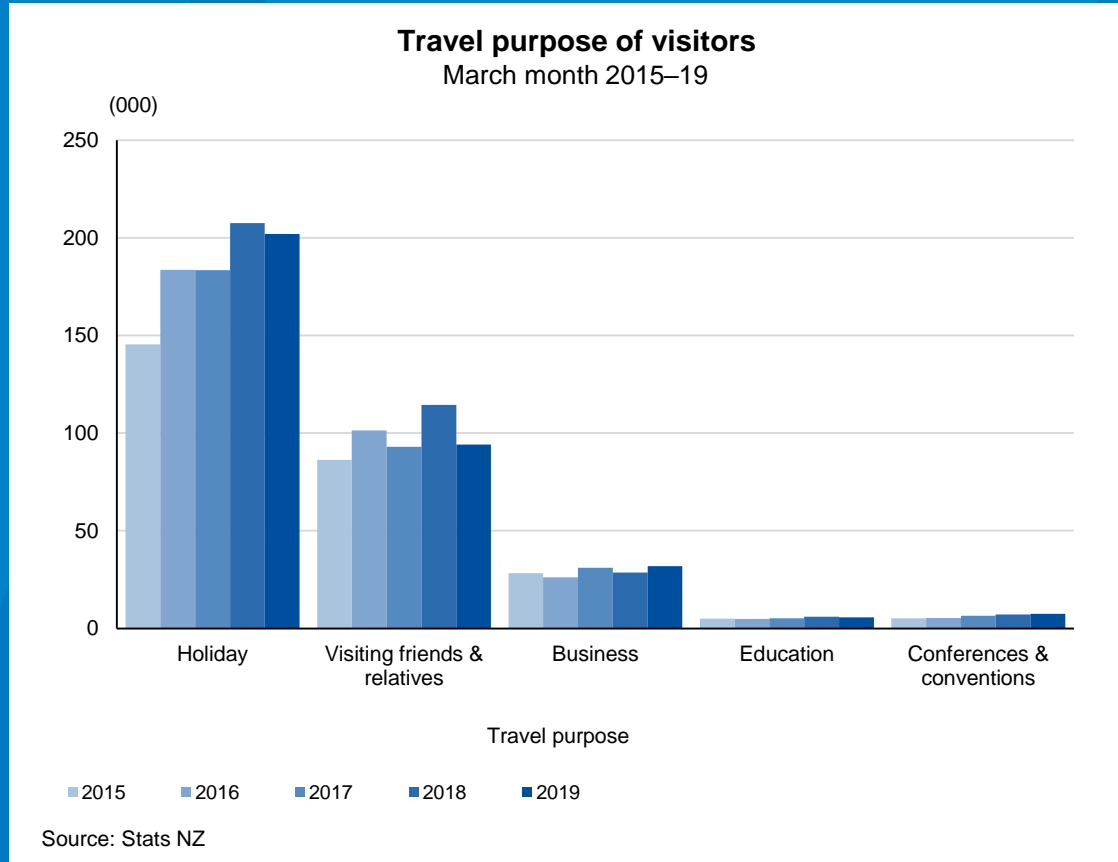
International arrivals – January 2019



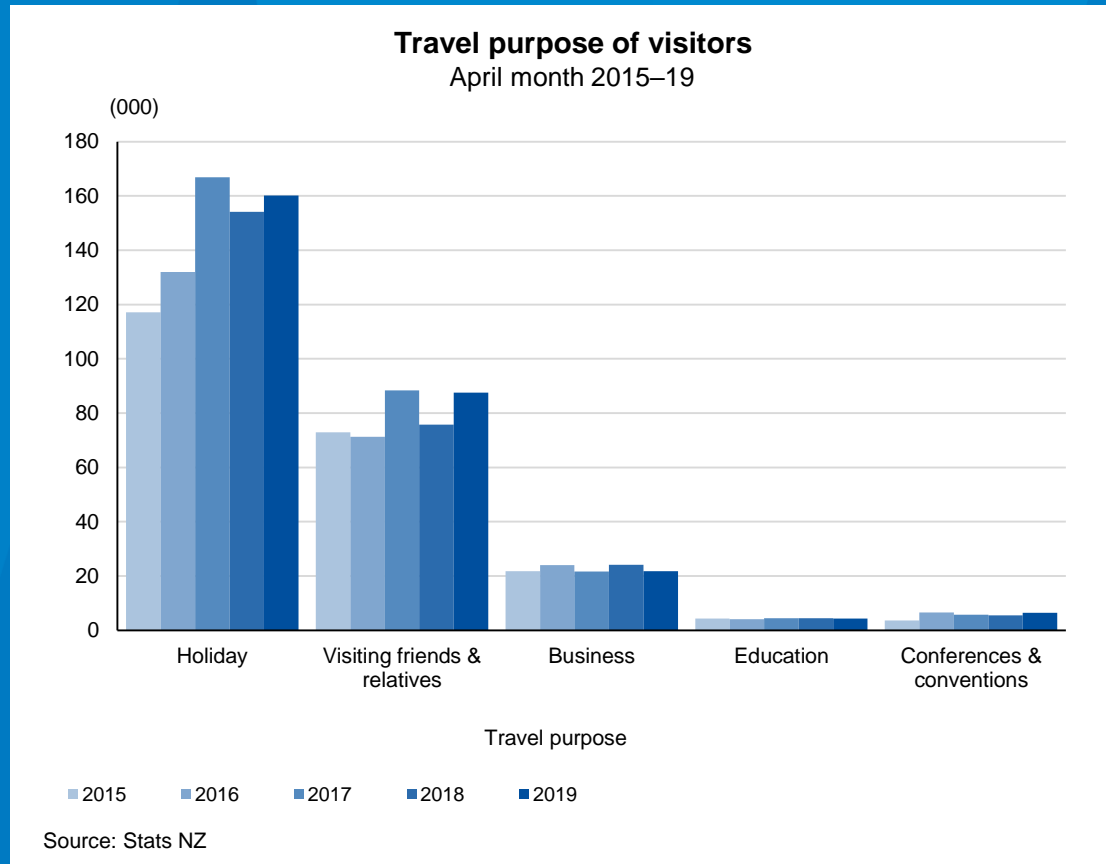
International arrivals – February 2019



International arrivals – March 2019

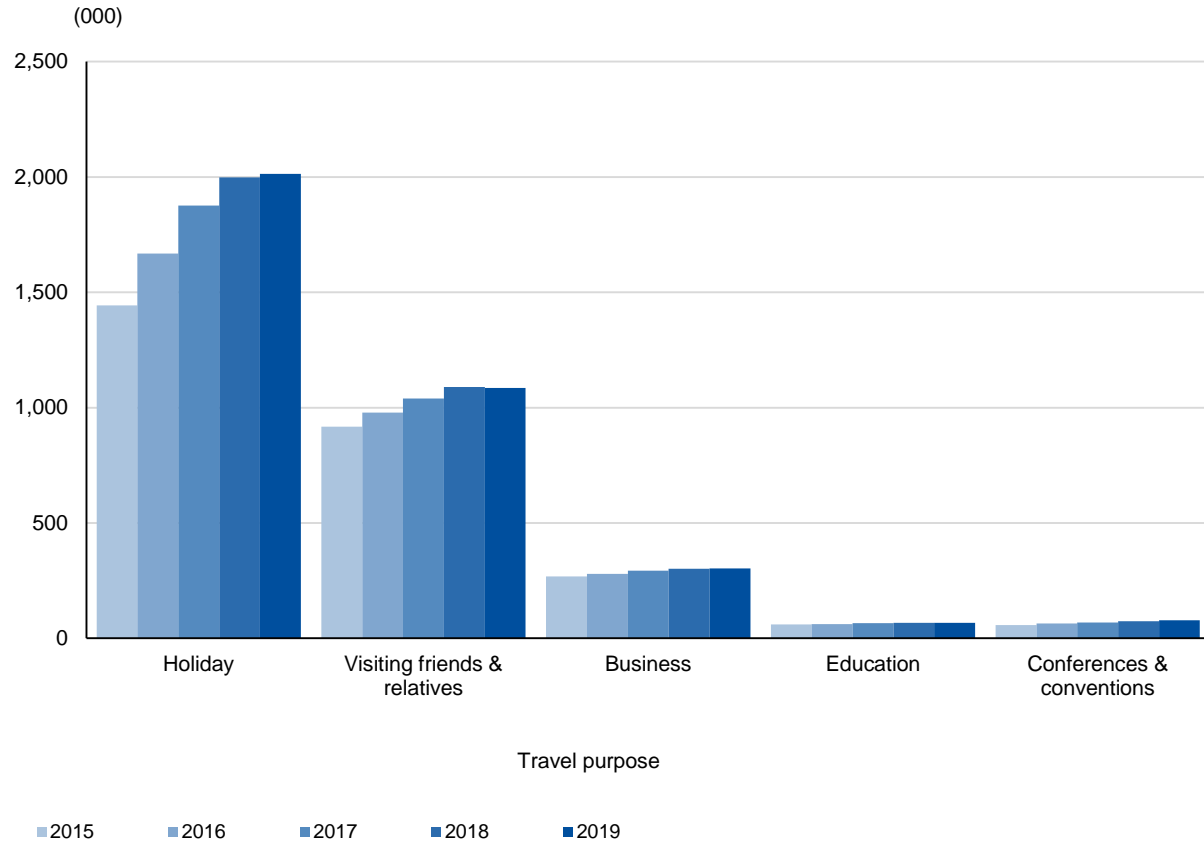


International arrivals – April 2019



Travel purpose of visitors

Year ended April 2015–19

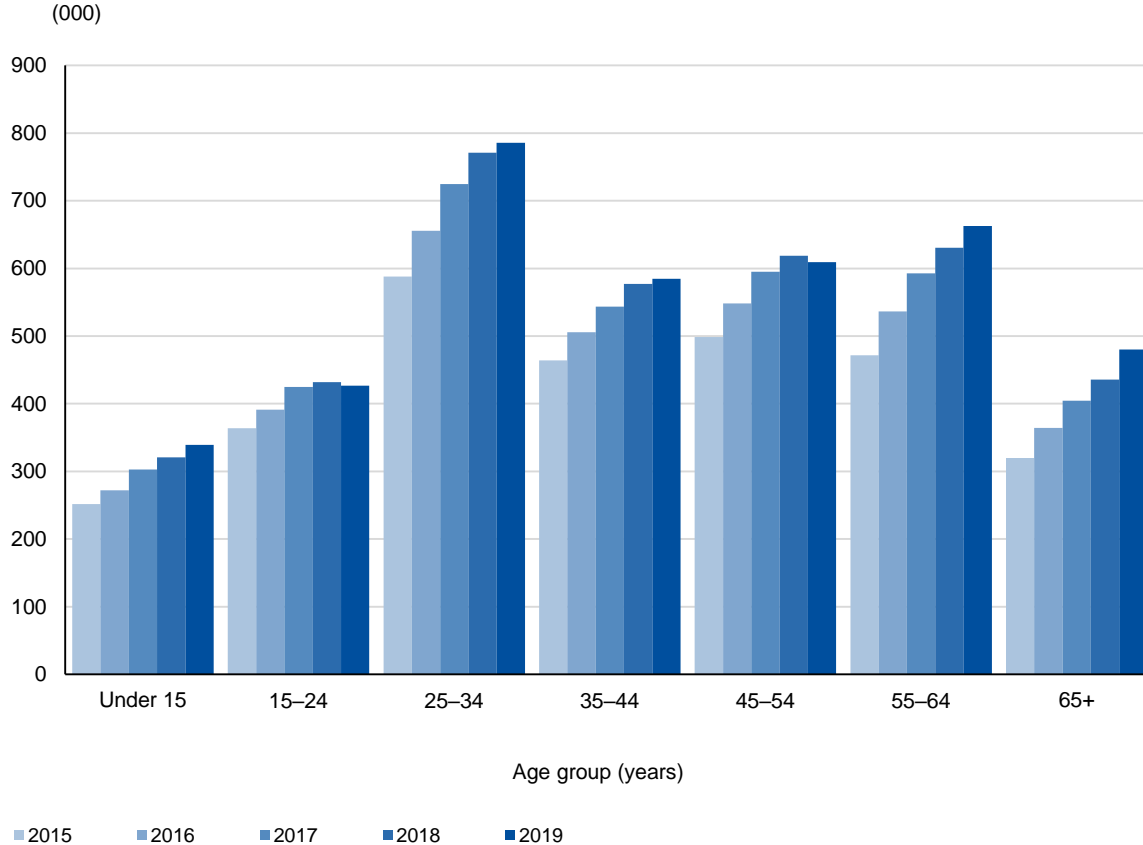


Source: Stats NZ

April YE All visitors

Age of visitors

Year ended April 2015–19

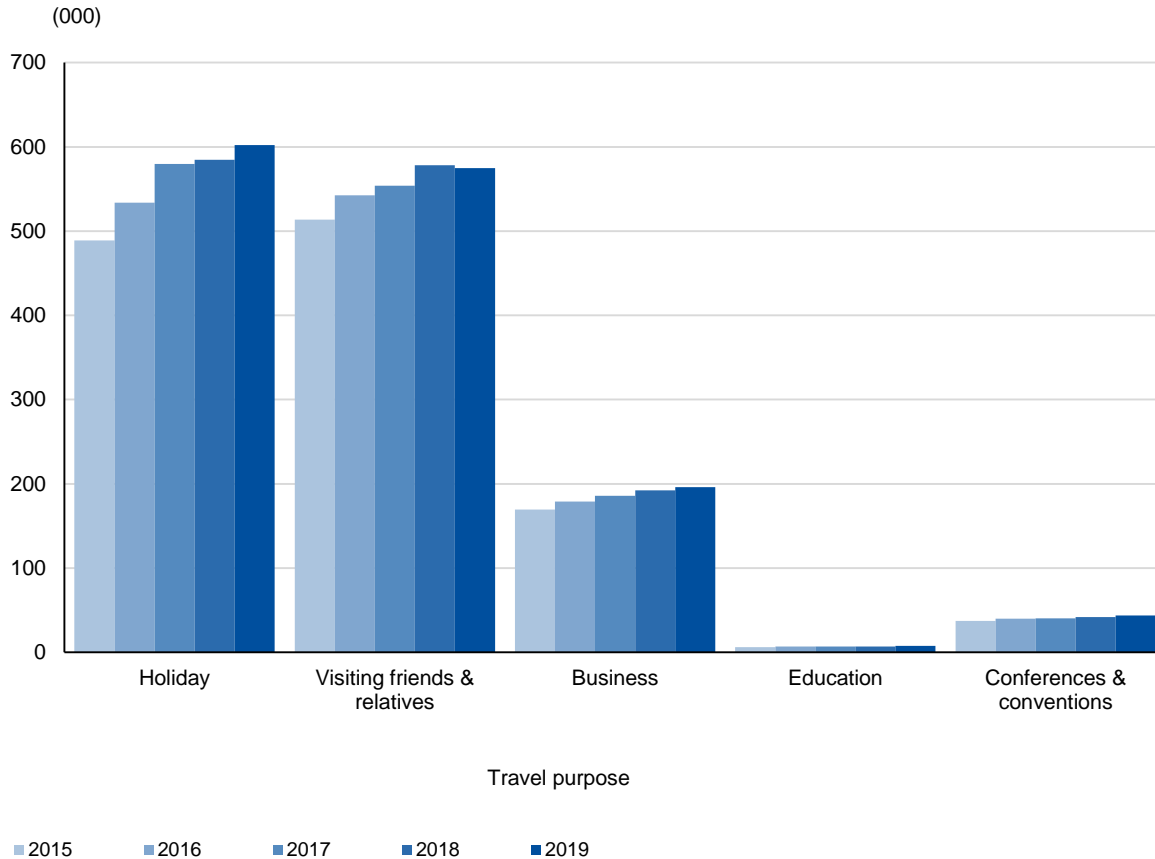


Source: Stats NZ

April YE All visitors

Travel purpose of visitors from Australia

Year ended April 2015–19

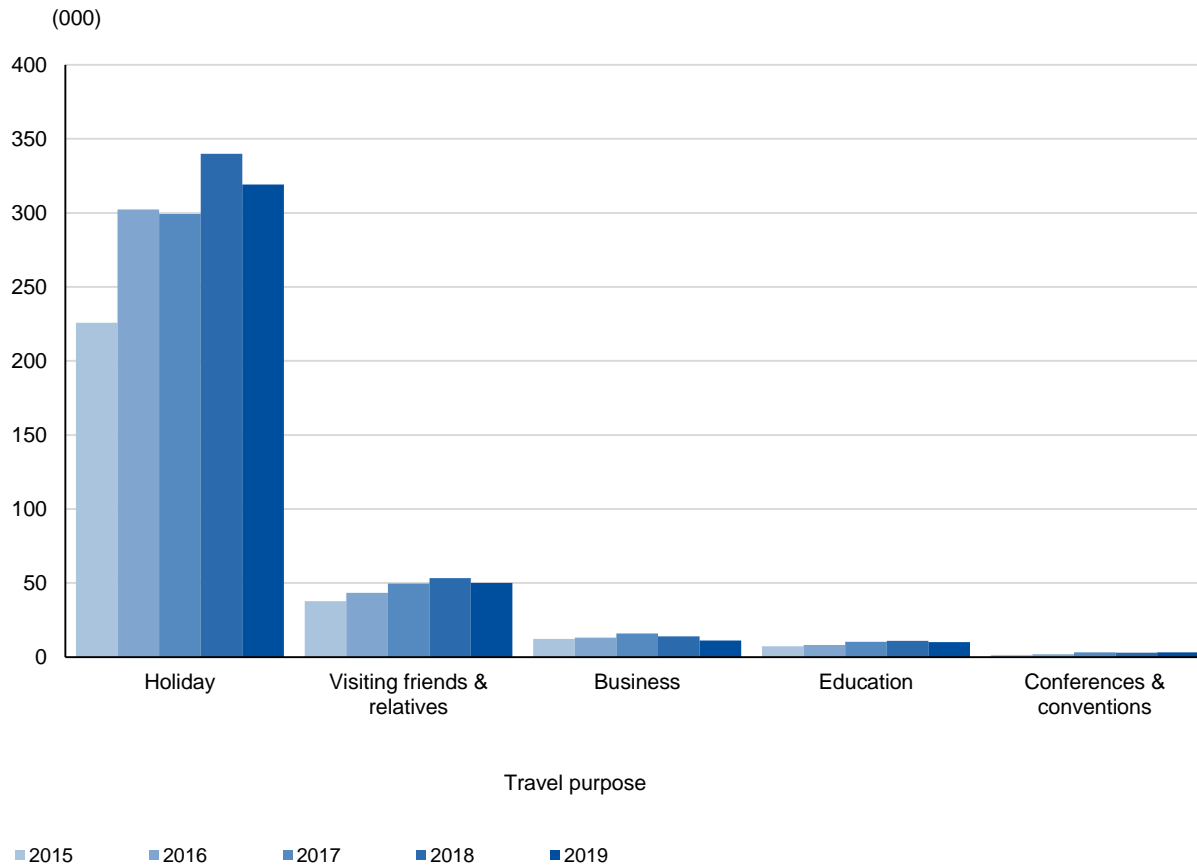


Source: Stats NZ

Australia

Travel purpose of visitors from China

Year ended April 2015–19

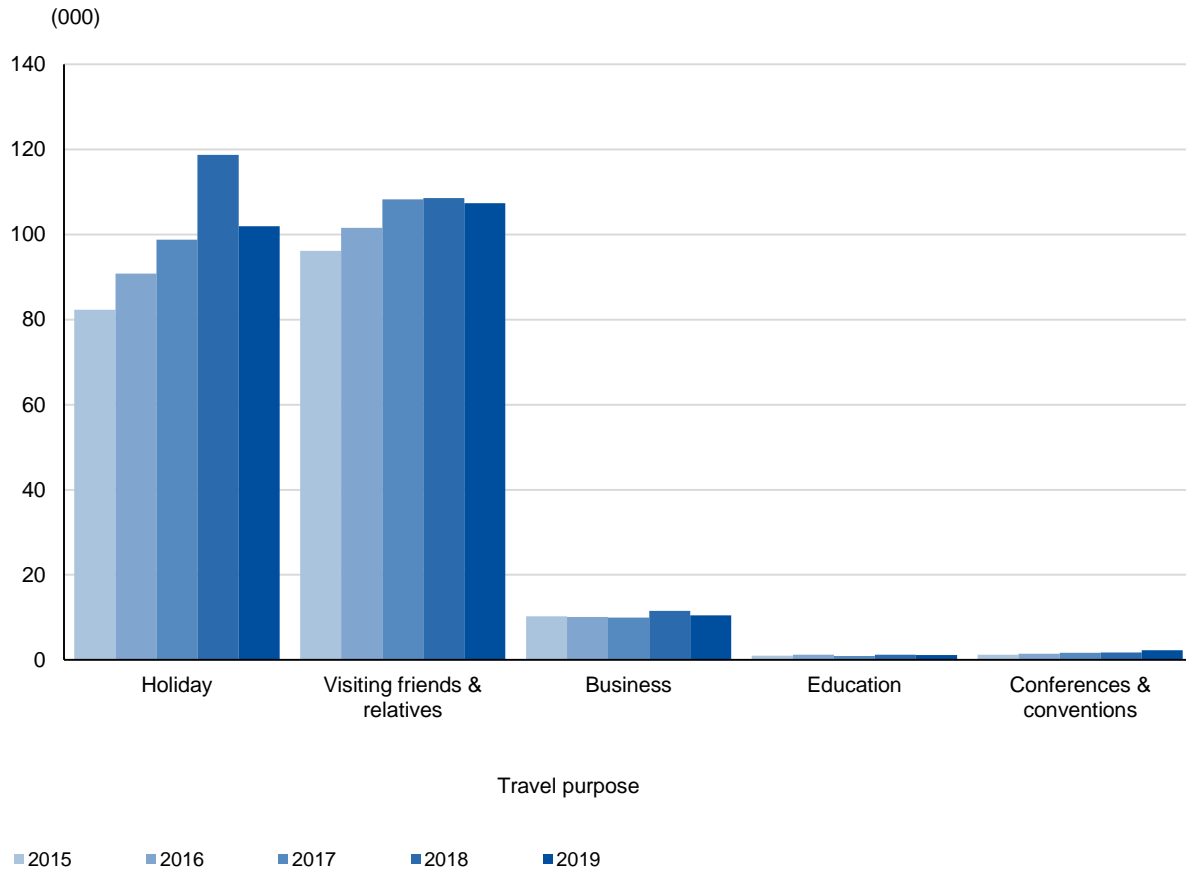


Source: Stats NZ

China

Travel purpose of visitors from the United Kingdom

Year ended April 2015–19

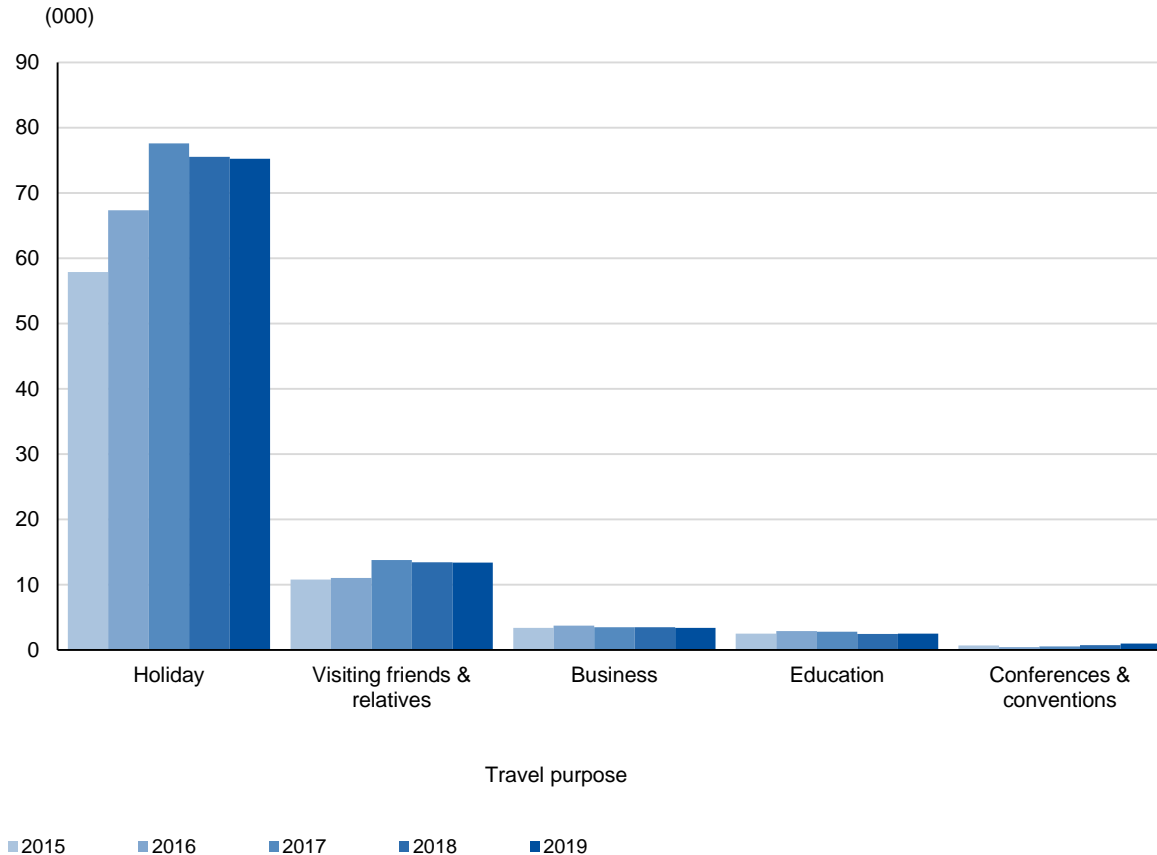


Source: Stats NZ

UK

Travel purpose of visitors from Germany

Year ended April 2015–19

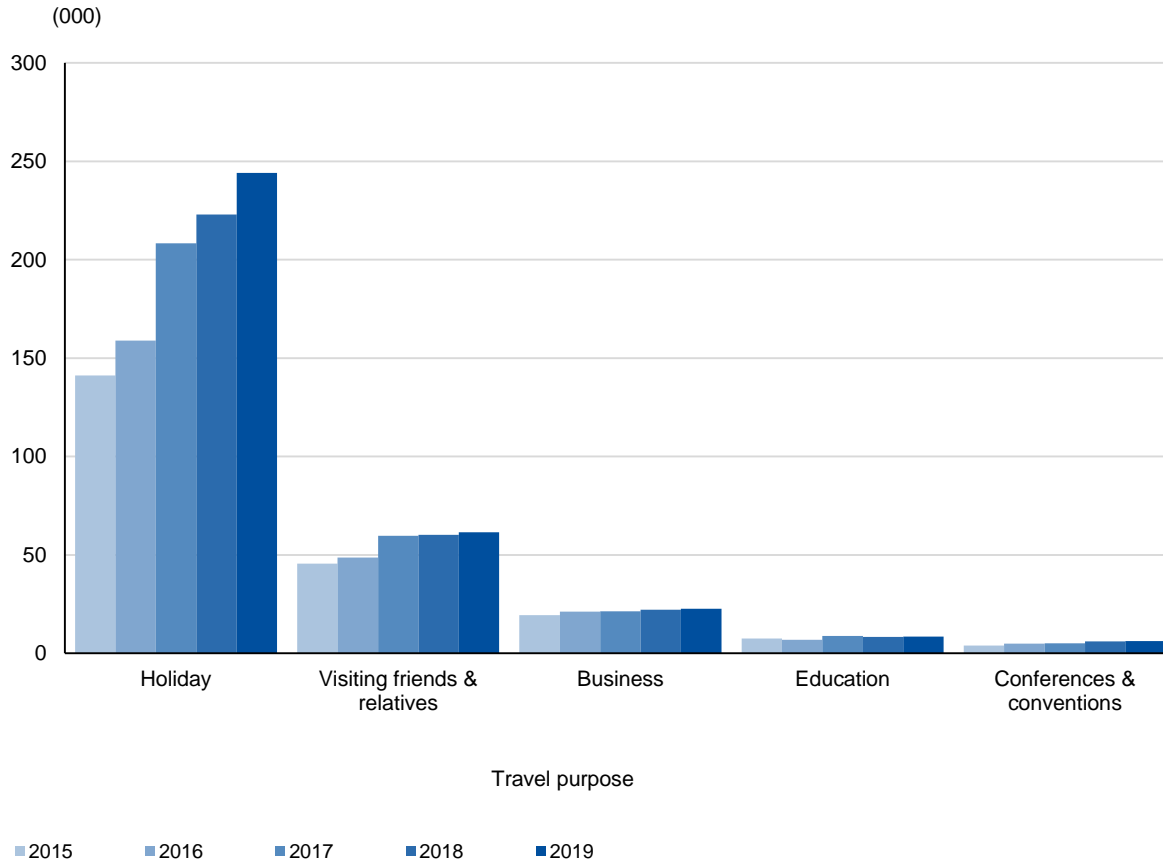


Source: Stats NZ

Germany

Travel purpose of visitors from the United States

Year ended April 2015–19



Source: Stats NZ

USA

International Tourism Forecasts

 **MINISTRY OF BUSINESS,
INNOVATION & EMPLOYMENT**
HĪKINA WHAKATUTUKI

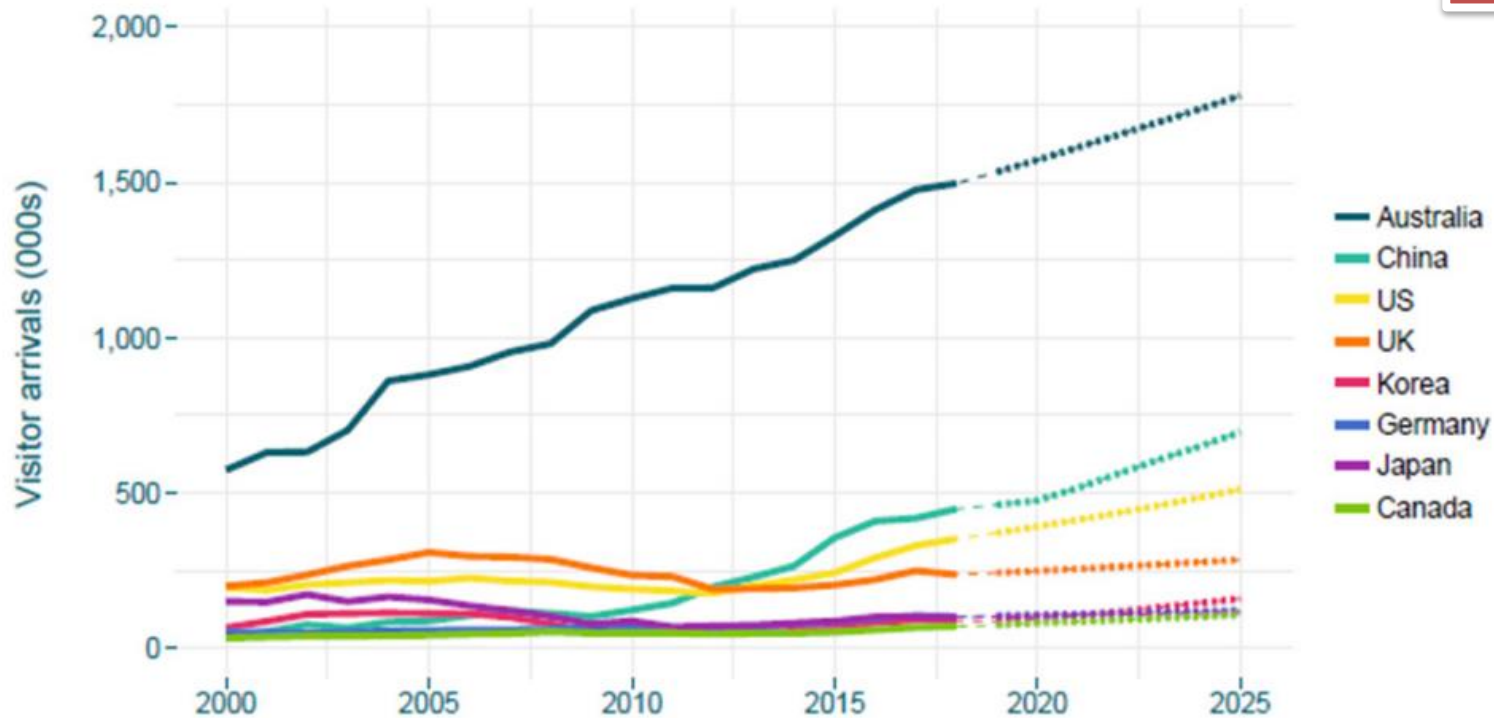
New Zealand Tourism Forecasts 2019 – 2025

May 2019



Forecast arrivals by country

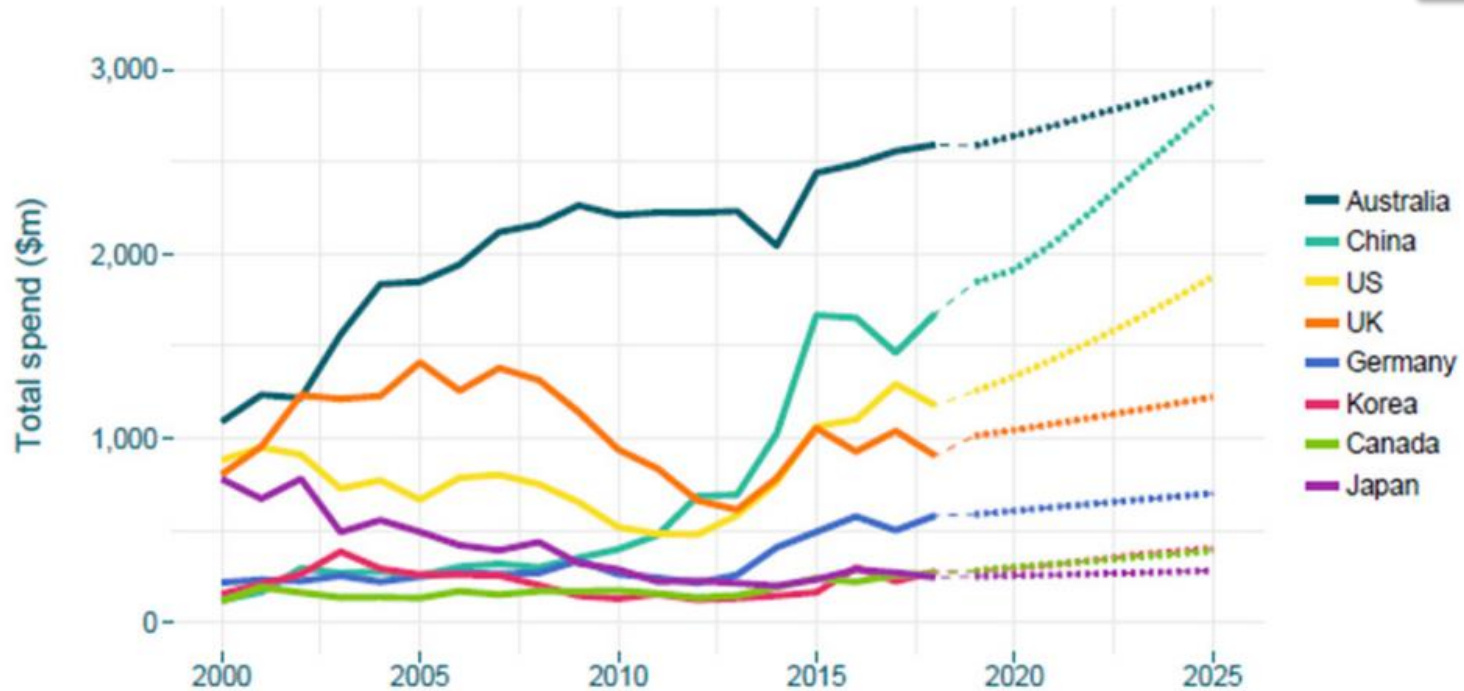
+ 4%



Source: Stats NZ and MBIE

Forecast spend by country

+ 4.3%



Source: MBIE

Outlook for all markets

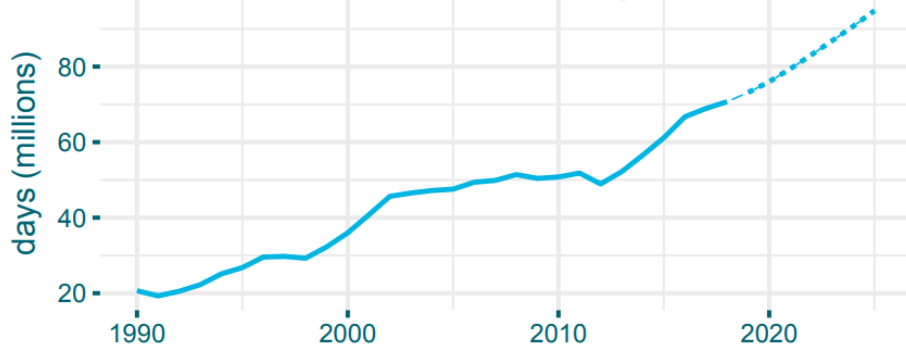


Summary	2018	2025	
Total spend (\$m) ¹	11,162	14,937	↑
Total visitors (000s) ²	3,863	5,077	↑
Total days (000s) ²	70,710	94,834	↑
Spend per day (\$)³	195	203	↑
Avg length of stay (days)²	18	19	↑

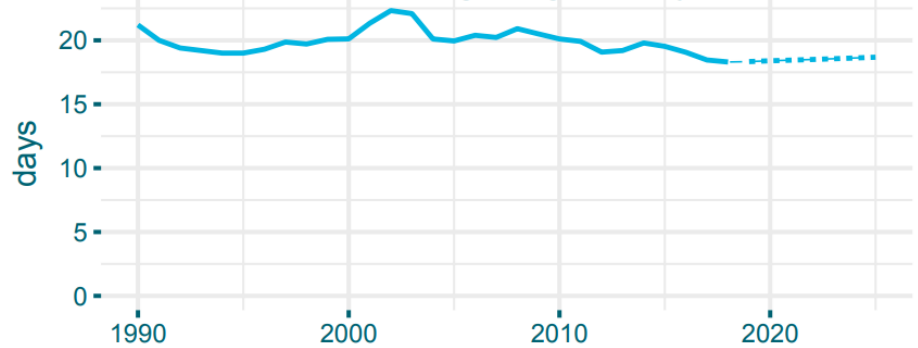
Year									Growth	
	2018	2019	2020	2021	2022	2023	2024	2025	Total	Annual ⁴
Total spend (\$m) ¹	11,162	11,513	11,975	12,505	13,099	13,707	14,309	14,937	34%	4.3%
Total visitors (000s) ²	3,863	3,989	4,131	4,304	4,492	4,683	4,874	5,077	31%	4%
Total days (000s) ²	70,710	73,139	76,004	79,418	83,104	86,903	90,747	94,834	34%	4.3%
Spend per day (\$)³	195	193	193	195	197	199	201	203	4%	0.6%
Avg length of stay (days)²	18	18	18	18	19	19	19	19	2%	0.3%

Total numbers forecast

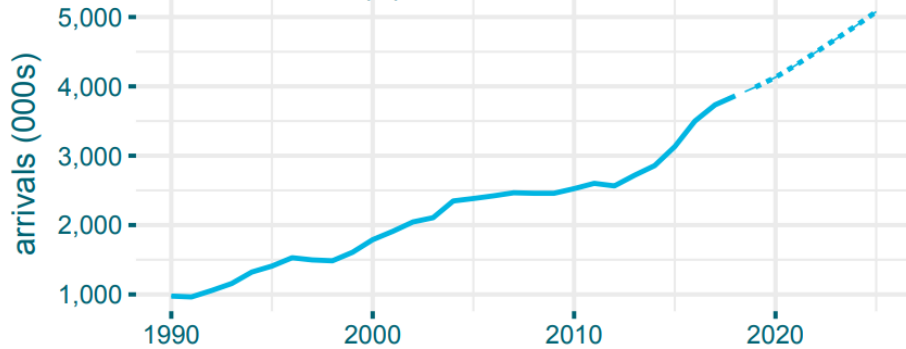
(C) Total visitor days



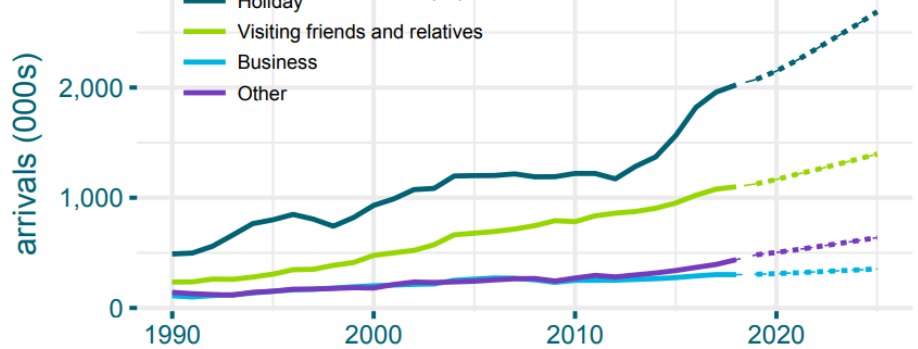
(D) Average length of stay



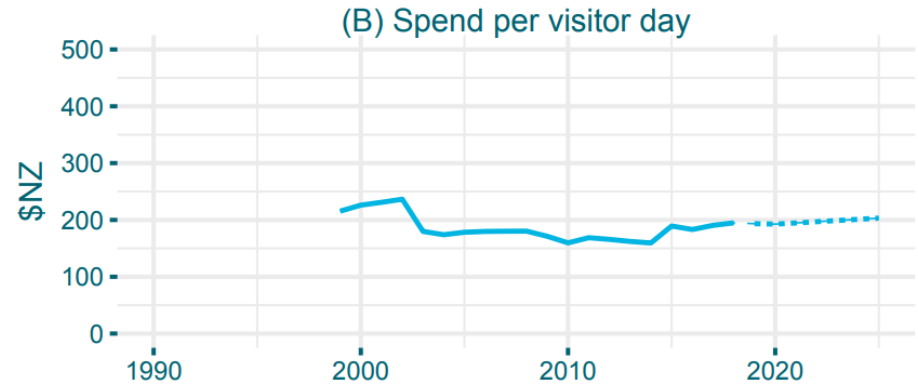
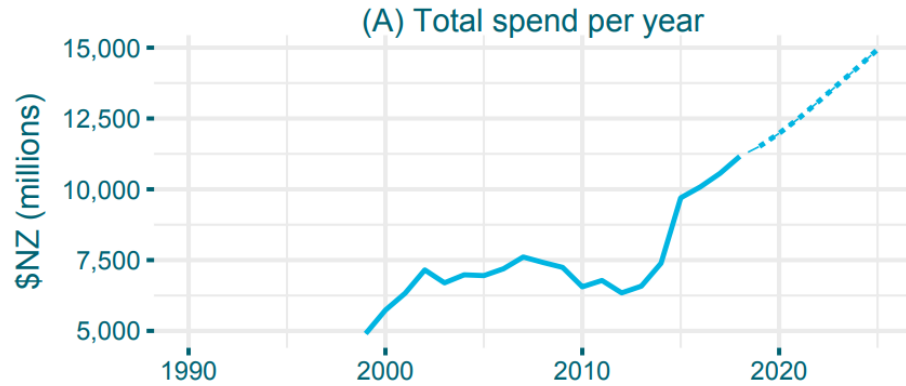
(E) Total visitor arrivals



(F) Visitor mix



Total spend forecast



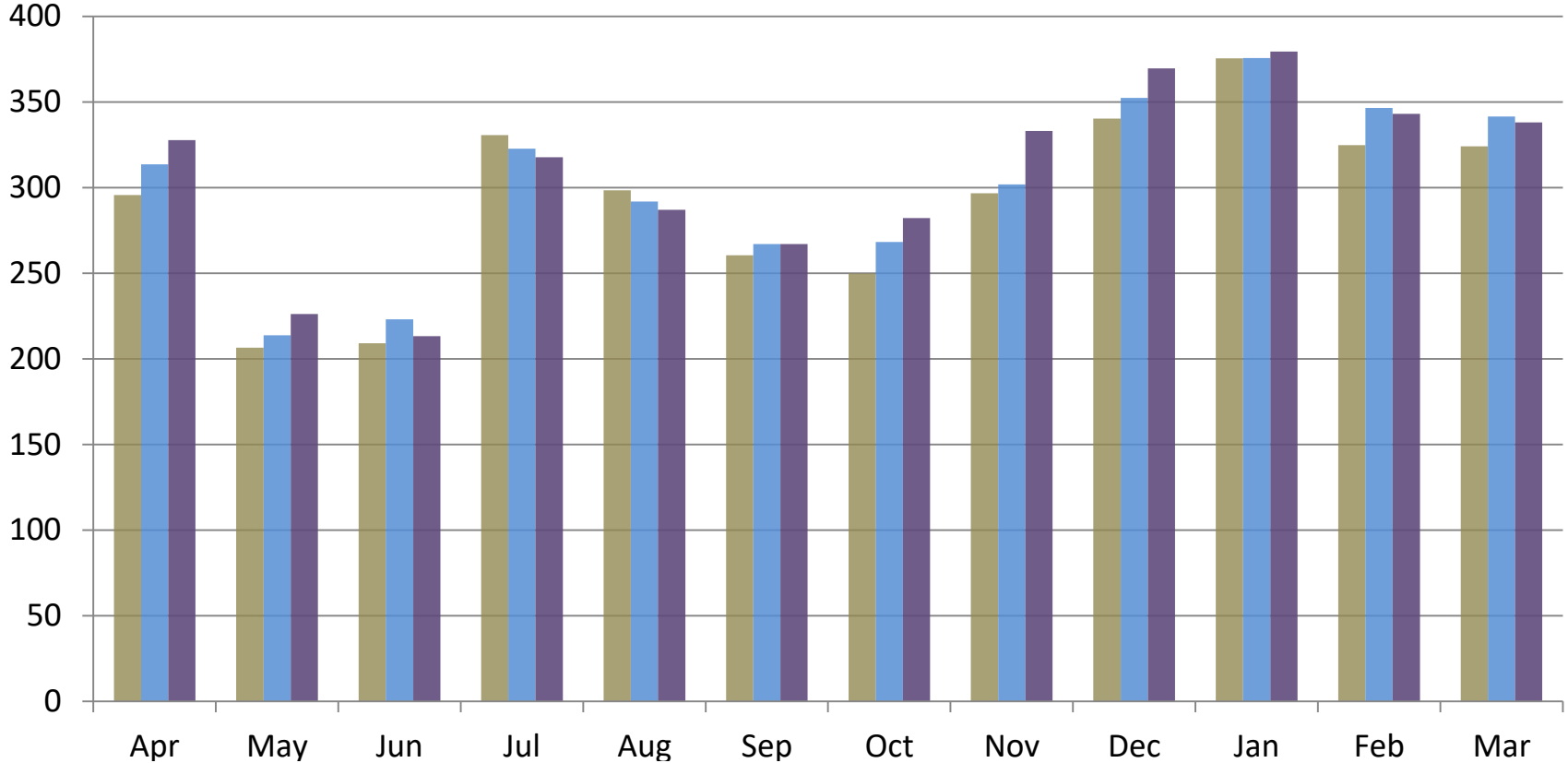
CAM Queenstown – March YE



Guest
Nights
(000)

Queenstown - Total Guest Nights - latest three years

2016/17 2017/18 2018/19



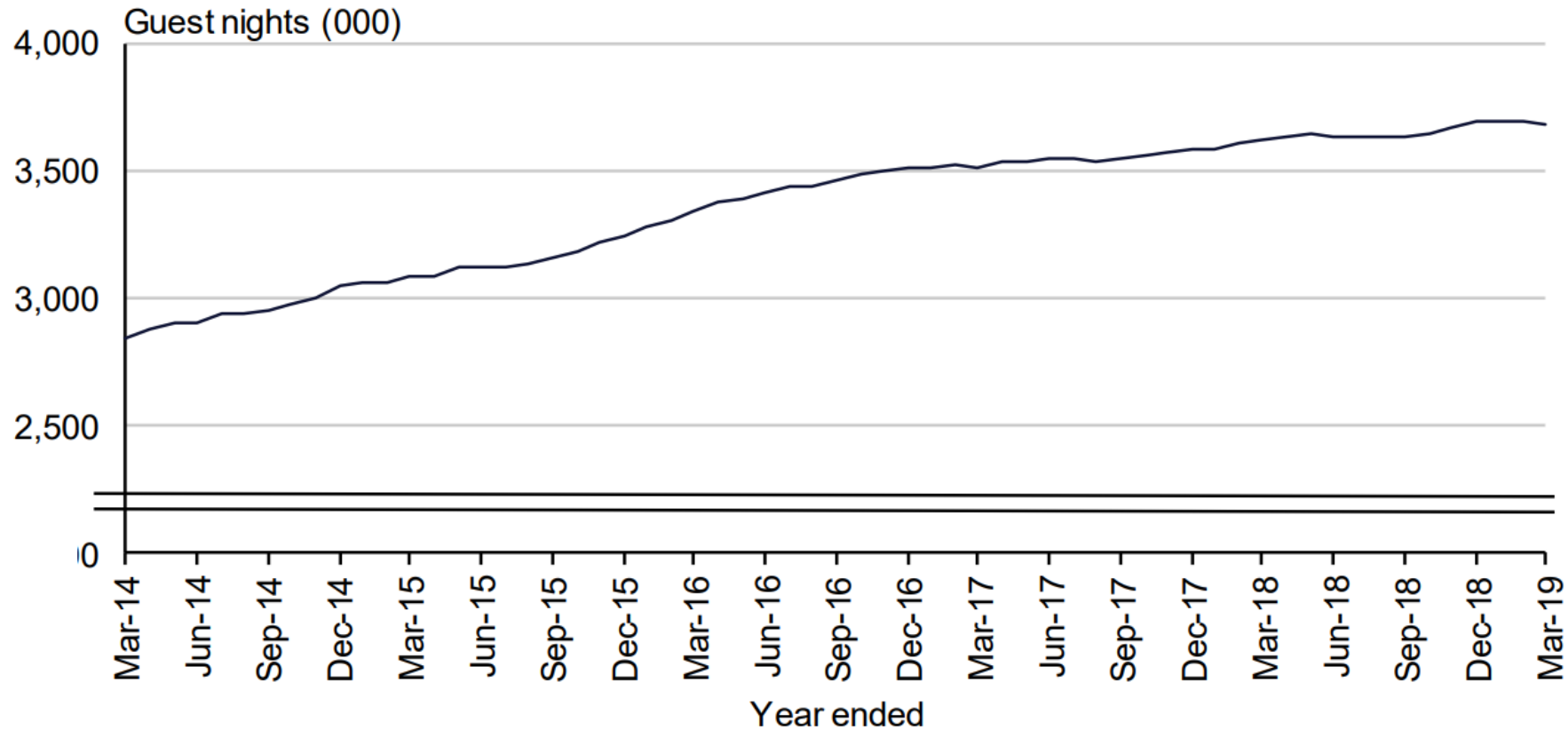
CAM March 2019

Year ended highlights

For the year ended March 2019 compared with the previous year:

- Guest nights rose 1.8 percent to 3,684,598
- International guest nights rose 0.6 percent to 2,586,197
- Domestic guest nights rose 4.9 percent to 1,098,401
- The average length of stay fell from 2.59 nights to 2.47 nights
- The overall occupancy rate fell from 71.2 percent to 68.7 percent
- Accommodation capacity, excluding holiday parks, rose 4.9 percent.

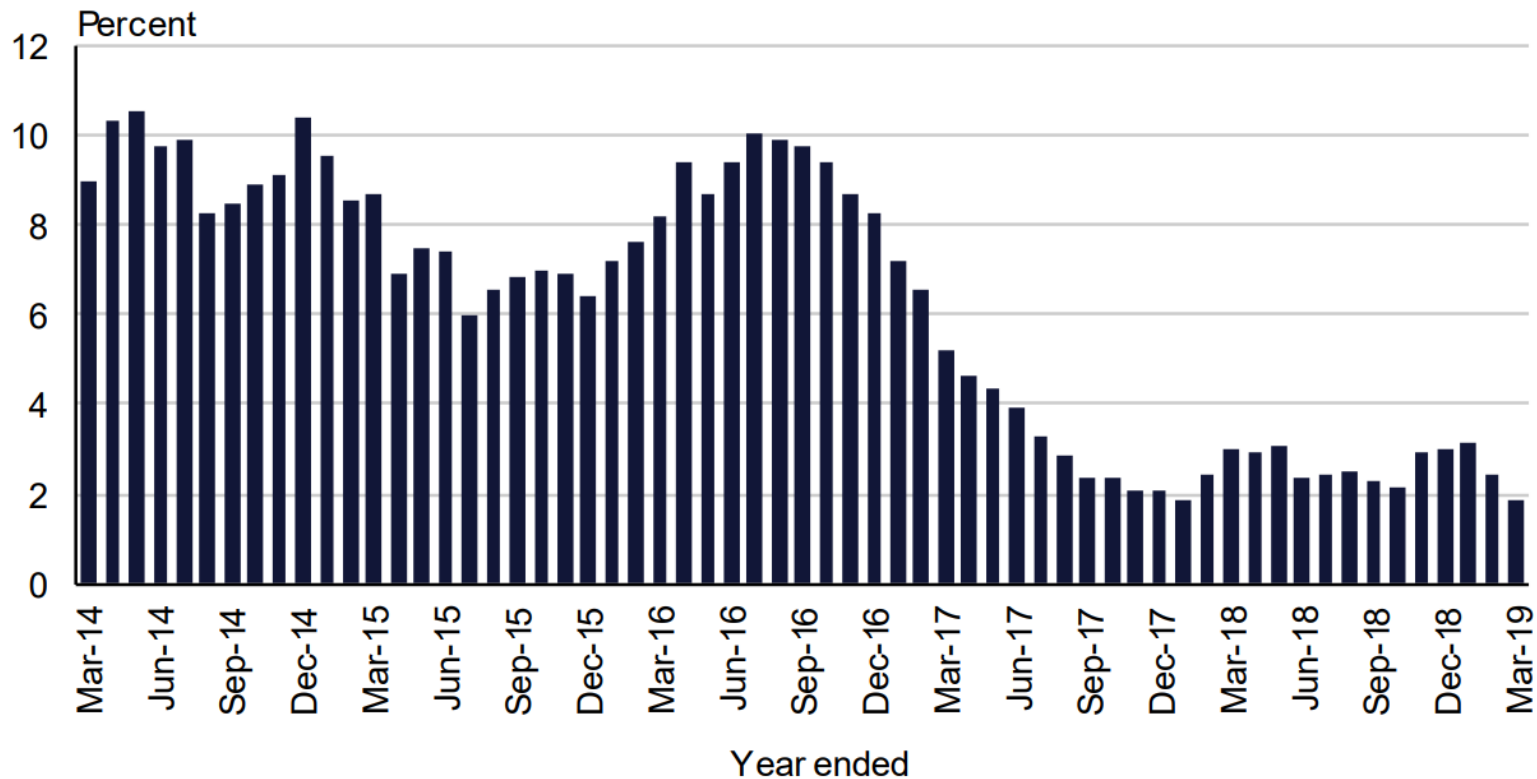
Queenstown RTO Area Annual Guest Nights



Source: Stats NZ

Queenstown RTO Area Annual Guest Nights

Change from previous year



Source: Stats NZ

Recent activity

YouTube^{NZ}

Search



Sam Chapman: Creating a sustainable community

Winter Campaign Update



Winter Campaign Update

Objective:

Position Queenstown as a vibrant fun winter destination, driving preference in Australia.

Strategy:

Integrated campaign anchored on a hero video showcasing our winter proposition and supported by digital and PR activity.

Timing:

Launch in November 2018 with ongoing activity well into winter 2019.

Winter Campaign Update

VIP Event in Sydney



Winter Campaign Update

Digital Campaign

Facebook



Queenstown NZ
Sponsored · 🌐

The countdown to Winter in Queenstown is on. Start dreaming of fresh powder, epic adventures and vibrant après ski.

welcometowinter.co.nz
Queenstown, Winter is Here [LEARN MORE](#)

👍❤️😄 153 86 Comments 10 Shares

👍 Like 💬 Comment ➦ Share

Instagram

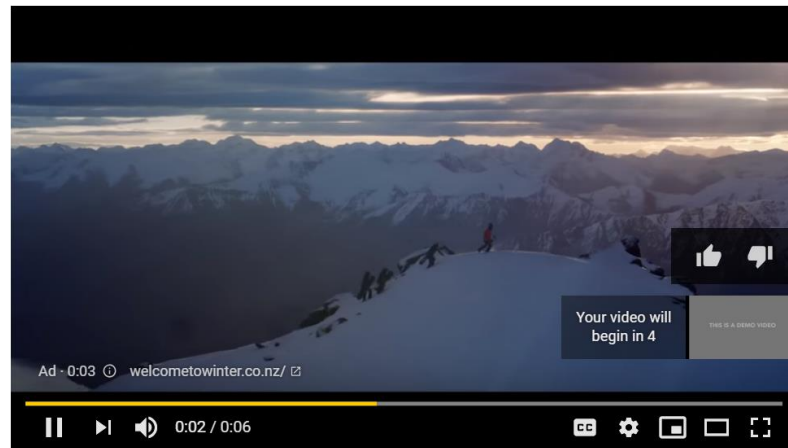


queenstownnz
Sponsored

Queenstown NEW ZEALAND | *feel the inspiration*

Watch More

YouTube



Ad · 0:03 ⓘ welcometowinter.co.nz/ ↗

0:02 / 0:06

Your video will begin in 4

RESULTS: 4.8 million people reached
1.8 million video views

Winter Campaign Update

Out of Home

St Kilda Festival, 10 February 2019



1-day free festival

560,000 people attended

24 video placements during the day

Sydney Film Festival, 5-11 June 2019



12-days on Pitt St Mall mega screens

Foot traffic of 124,000 people per day

300 video placements during the period

Winter Campaign Update

Branded Content

Boss Hunting, March-April 2019



5 articles

31,135 page views

441,935 people reach

18,695 engagements across social channels

Snows Best, February 2019



10 posts

42,350 views

156,000 people reached

Qualified skiing audience



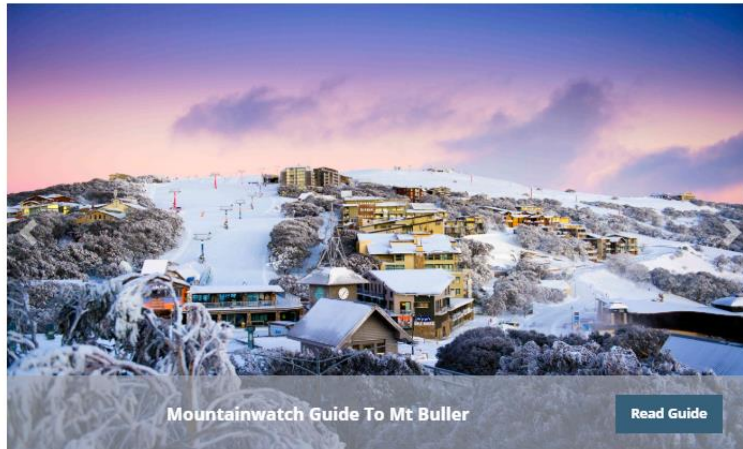
Winter Campaign Update

Sydney Mural



Winter Campaign Update

Snow Reports



Aus Snow Report 7th June



Australian Backcountry



Weekly videos on Mountain Watch

Partnership project with LWT

700,000 unique website visits

100,000 newsletters subscribers





A long-exposure photograph of a waterfall in a lush, moss-covered forest. The water flows over several tiers of large, dark rocks, creating a soft, white, misty effect. The surrounding environment is dense with green moss and various plants, creating a vibrant and natural setting. The word "Sustainability" is overlaid in white text on the left side of the image.

Sustainability

Queenstown Can!



TIAKI

Queenstown Cares

TIA Sustainability commitment

DQ Sustainability programme

Member resources



TIAKI MEANS TO CARE FOR PEOPLE AND PLACE. THE TIAKI PROMISE IS A COMMITMENT TO CARE FOR NEW ZEALAND, FOR NOW AND FOR FUTURE GENERATIONS.

NEW ZEALAND IS PRECIOUS, AND EVERYONE WHO LIVES AND TRAVELS HERE HAS A RESPONSIBILITY TO LOOK AFTER IT.

BY FOLLOWING THE TIAKI PROMISE, YOU ARE MAKING A COMMITMENT TO NEW ZEALAND. TO ACT AS A GUARDIAN, PROTECTING AND PRESERVING OUR HOME.

NAU MAI, HAERE MAI KI AOTEAROA, WELCOME TO NEW ZEALAND.

TIAKINEWZEALAND.COM | [#TIAKIPROMISE](https://twitter.com/TIAKIPROMISE)

TIAKI PROMISE

— WHILE TRAVELLING IN NEW ZEALAND I WILL —



CARE FOR LAND, SEA AND NATURE,
TREADING LIGHTLY AND LEAVING NO TRACE



TRAVEL SAFELY, SHOWING CARE
AND CONSIDERATION FOR ALL



RESPECT CULTURE, TRAVELLING
WITH AN OPEN HEART AND MIND



— HOW TO CARE FOR NEW ZEALAND —



PROTECT
NATURE



KEEP NZ
CLEAN



DRIVE
CAREFULLY



BE
PREPARED



SHOW
RESPECT

Collateral support

TIAKI PROMISE
WHILE TRAVELLING IN NEW ZEALAND I WILL

CARE FOR LAND, SEA AND NATURE, TREADING LIGHTLY AND LEAVING NO TRACE

TRAVEL SAFELY, SHOWING CARE AND CONSIDERATION FOR ALL

RESPECT CULTURE, TRAVELLING WITH AN OPEN HEART AND MIND

HOW TO CARE FOR NEW ZEALAND

- PROTECT NATURE
- KEEP NZ CLEAN
- DRIVE CAREFULLY
- BE PREPARED
- SHOW RESPECT

tiaki CARE FOR NEW ZEALAND

Tiaki means to care for people and place. The Tiaki Promise is a commitment to care for New Zealand, for now and for future generations.

New Zealand is precious, and everyone who lives and travels here has a responsibility to look after it.

By following the Tiaki Promise, you are making a commitment to New Zealand. To act as a guardian, protecting and preserving our home.

Nau Mai, Haere Mai Ki Aotearoa. Welcome to New Zealand.

TIAKINEWZEALAND.COM #TIAKIPROMISE

TIAKI 宣言
在新西兰旅行时, 我将

爱护这里的土地、海洋和大自然
游过无痕

安全旅行, 对所有人心存关怀与善意

尊重当地文化, 旅途中怀揣一颗开放包容之心

与大家一起关爱新西兰

tiaki CARE FOR NEW ZEALAND

Tiaki在毛利语中的意思是关爱人和环境。“Tiaki宣言”是一份关爱新西兰的承诺, 爱护当下所拥有的和子孙后代将享有的环境为现在, 也为后人。

在这里生活和实践这里旅行的每一个人都有责任关爱这里的环境这片宝贵的土地。

遵守“Tiaki宣言”, 与大家一起关爱新西兰。做一名守护者, 保护我们的家园。

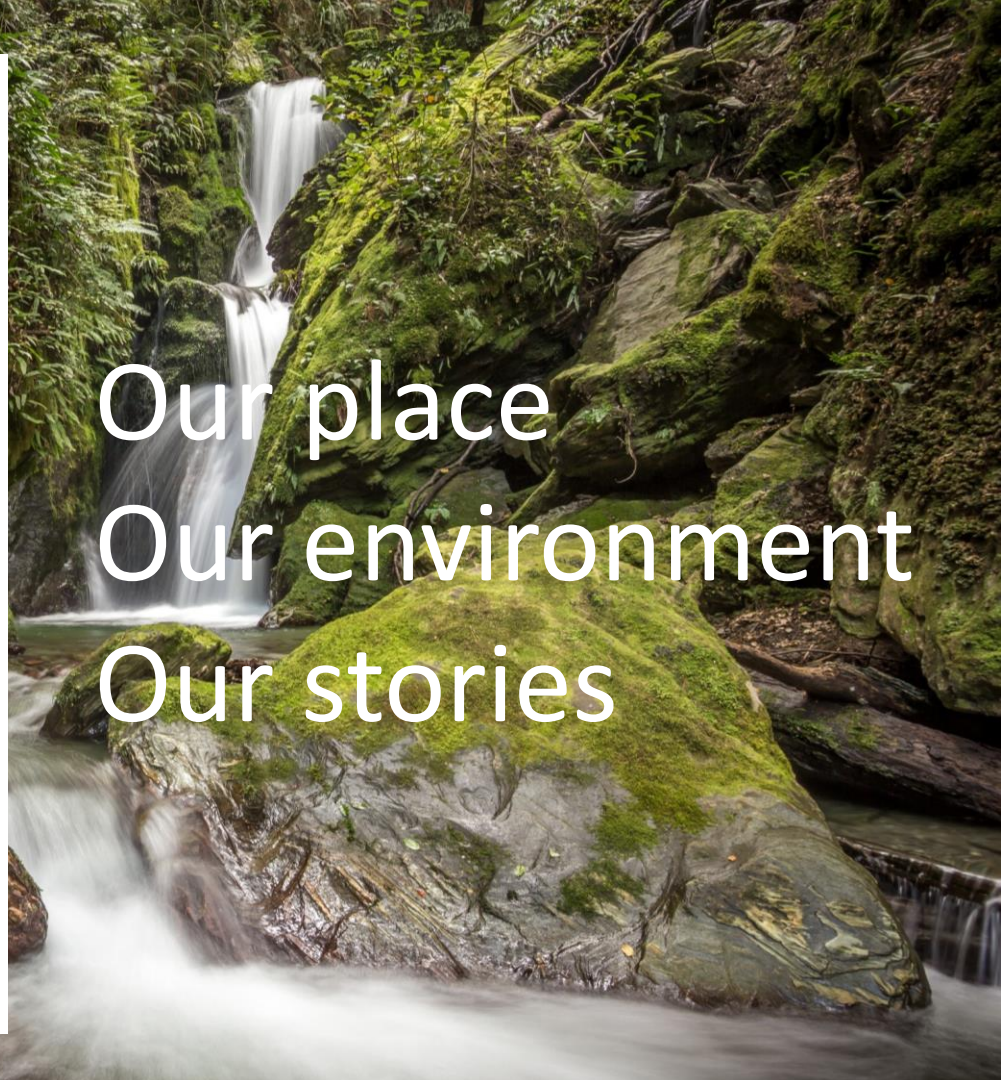
NAU MAI, HAERE MAI KI AOTEAROA,
欢迎来新西兰!

TIAKINEWZEALAND.COM #TIAKIPROMISE

- 爱护自然
- 维护新西兰的纯净
- 小心驾驶
- 做好充分准备
- 展现尊重



Our place
Our environment
Our stories



The components of the New Zealand Tourism Sustainability Commitment

4

Four Elements to be managed well for the tourism industry's long term success:

8

Eight Goals to help the industry achieve sustainability, two for each Element of the sustainability model.

14

The Goals are supported by 14 business-led Commitments that will enable the Goals to be achieved over time.

ECONOMIC

Tourism is delivering prosperity across the New Zealand economy.

HOST COMMUNITY

New Zealanders strongly support and reap the benefit from tourism operating in their communities.



COMMITTED TO
SUSTAINABLE
TOURISM

VISITOR

New Zealand delivers world leading experiences for both international and domestic visitors.

ENVIRONMENT

Tourism is recognised for its contribution to protecting, restoring and enhancing New Zealand's natural environment and biodiversity.

Member resources



Plan

See & Do

Stay

Eat & Drink

Stories

♥ My Queenstown (0)



Sustainability



Listing Optimisation Guide



Insights



Plans & Reports



Remarks Newsletters



DO Board



Member Events



Consumer Marketing Campaigns



Media



Queenstown – *Let's own this!*



Plan

See & Do

Stay

Eat & Drink

Stories

Event Planning Study



My Queenstown (0)

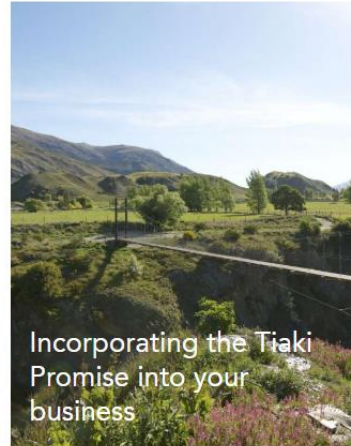


Focus on Sustainability

Home / New Members / Members Area / Focus on Sustainability



Member content



Follow us and share your stories #queenstownlive



Ratings by: tripadvisor®

Tiaki Promise



Plan

See & Do

Stay

Eat & Drink

Stories

♥ My Queenstown (0)



Incorporating the Tiaki Promise into your business

by Queenstown, NZ / ⌚ 2 Min Read

How to incorporate the Tiaki Promise into your business and then articulate this to customers.

New Zealand is a special place, and everyone who lives and travels here has a responsibility to look after it. The Tiaki Promise is a commitment to care for New Zealand while travelling.

In Queenstown, that includes looking after our mountains, lakes and rivers, driving with care and to the conditions, and respecting everyone you meet, visitor or local.

Tiaki is for all travellers to embrace, both domestic and international, when they embark on a visit to Queenstown.

The national agencies that developed Tiaki have worked to make sure visitors on their way to New Zealand start to hear about Tiaki before they arrive, with Air New Zealand showing the Tiaki video to passengers on some international flights.

Locally, Queenstown Airport shows Tiaki messaging throughout the terminal, expanding the coverage of the campaign in our region.

We strongly encourage Destination Queenstown members to incorporate the Tiaki Promise into their business and service to guests, to ensure that



Sustainability commitment



Plan

See & Do

Stay

Eat & Drink

Stories

♥ My Queenstown (0)



Tourism Sustainability Commitment

by Queenstown, NZ / ⌚ 1 Min Read

This industry initiative addresses all aspects of sustainability, and provides a pathway for you to implement new practices to collectively lift the standard of the tourism industry.

Tourism Sustainability Commitment

Tourism Industry Aotearoa's Tourism Sustainability Commitment can be the start of your sustainability journey.

The TSC's 14 commitments are broken down into specific actions that aim to tackle a range of sustainability measures, across environment, community and business resilience. Essentially it's a blueprint to becoming a more sustainable business, broken down into sections that can inform your own business decisions and initiatives.

The TSC aims to make sure every New Zealand tourism business is committed to better practices by 2025, and TIA's vision is that New Zealand leads the world in sustainable tourism.

You can find more information and become one of the more than 100 Queenstown business to date that have made the commitment [HERE](#)

Megan Williams is your regional contact for all things Tourism Sustainability Commitment. She is available by email megan.williams@tia.org.nz or mobile phone on +64 27 229 1607.



DQ - Our team journey



Destination Queenstown

has agreed to adopt the

New Zealand Tourism Sustainability Commitment

HE KUPU TAURANGI KIA TOITŪ AI TE TĀPOITANGA

OUR VISION: LEADING THE WORLD IN SUSTAINABLE TOURISM

OUR BUSINESS WILL:

ECONOMIC	VISITOR	HOST COMMUNITY	ENVIRONMENT
<p>1 Focus on long term financial performance.</p> <p>2 Invest capital to grow, and/ or to improve quality and productivity.</p> <p>3 Innovate and have effective strategies to mitigate the effects of seasonality.</p>	<p>4 Undertake customer satisfaction monitoring, evaluation and reporting.</p> <p>5 Innovate to improve or upgrade our offering to enhance visitor experience.</p> <p>6 Educate visitors about New Zealand's cultural and behavioural expectations.</p>	<p>7 Pay a fair wage to all staff.</p> <p>8 Support our workforce to flourish and succeed.</p> <p>9 Actively engage with the communities in which we operate.</p> <p>10 Have socially and environmentally sustainable supply chains.</p>	<p>11 Contribute to ecological restoration initiatives.</p> <p>12 Have carbon reduction programmes towards carbon neutrality.</p> <p>13 Have waste reduction and management programmes.</p> <p>14 Engage with our visitors and communities on the importance of restoring, protecting and enhancing New Zealand's natural environment.</p>

We will also:

- Strive to live the sustainability values and outperform the requirements.
- Work purposefully to adopt the Commitments into our business practices.
- Monitor and report progress on each Commitment within our business.
- Respond to TIA's annual survey on our progress on each Commitment.
- Tell stories about what we and the industry are doing and achieving.





WWW.SUSTAINABLETOURISM.NZ

Graham Budd
Chief Executive Officer
Destination Queenstown



Chris Roberts
CHIEF EXECUTIVE
TOURISM INDUSTRY AOTEAROA







Sustainability Policy and Plan

June 2019

Contents

- 1.0 Destination Queenstown Sustainability Policy and Plan – Chief Executive Letter
- 2.0 Defining Sustainability
- 3.0 NZ Tourism & Sustainability
- 4.0 Vision
- 5.0 Purpose
- 6.0 DQ Sustainability Committee
- 7.0 Goals
- 8.0 DQ Office Sustainability Policy
- 9.0 Additional Sustainability Commitments



DQ Sustainability Handbook

This handbook is the go-to manual for all things Sustainable for Destination Queenstown.

This document should be updated when procedures change and when new activity is introduced.



QUEENSTOWN RECYCLING

{ WHAT YOU NEED TO KNOW }

Queenstown is a beautiful place, and we'd like to keep it that way. Please keep your recyclable material out of the landfill by putting it in the bin with the blue lid and following the simple steps below!

THE FOLLOWING ITEMS CAN BE RECYCLED	THESE ITEMS CAN'T BE RECYCLED
<p>PLASTICS 1-7 Washed, not crushed and lids off</p>	<p>PLASTIC BAGS OR GLAD WRAP</p>
<p>STEEL TINS AND ALUMINIUM CANS Washed with lids separate</p>	<p>PESTICIDES, OIL OR HAZARDOUS CHEMICALS</p>
<p>EMPTY AEROBOL CANS</p>	<p>PYREX, CERAMICS, WINDOW GLASS OR BROKEN GLASS</p>
<p>CLEAN ALUMINIUM FOIL</p>	<p>MATERIALS CONTAMINATED WITH FOOD</p>
<p>GLASS BOTTLES AND JARS Washed with the lid off (the lids can also go in the recycling container)</p>	<p>PLASTIC OR METAL BINDING</p>
<p>CLEAN PAPER AND CARDBOARD For example office paper, magazines, newspapers, egg cartons, cereal boxes, envelopes</p>	<p>WAX COATED OR FOIL LINED CARTONS For example milk or juice cartons</p>
	<p>POLYSTYRENE</p>

DQ Team initiative



Sustainable tote bag



Demonstrating that we DO care!



DQ Sustainability committee





tiaki

CARE FOR NEW ZEALAND

TIAKINEWZEALAND.COM | #TIAKIPROMISE



QLDC Mayor Jim Boulton, CEO Mike Theelen



Thank you

Enjoy the Winter!

