

*Destination Queenstown*

# Queenstown Connect – India

*Thursday, August 22, 2019*



Kiran Nambiar – Business Development Director



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# Opportunity for Queenstown

1. Families on Summer Vacations (April May June)
2. Incentive Market (All Year)
3. Honeymoon Market (October to January)

# Opportunity for NTOs



## 5 STEPS TO UNLOCKING THE POTENTIAL OF THE INDIAN OUTBOUND LEISURE MARKET

1. Deliver Value
2. Provide More Non-Stop Connectivity
3. Increase Air Capacity
4. Simplify Visa Requirements
5. Apply more Sophisticated Marketing & Segmentation

# Portfolio of Markets

Critical Core – New Zealand & Australia

Pacific Rim – China, North America, South East Asia

Long Haul – India, United Kingdom, Germany

Emerging – Indonesia, Brazil & Argentina

# Market Matrix

Market Type	Market	Objective	Target Audiences
Critical Core	New Zealand	Grow domestic visitation in Autumn, Winter and Spring by continuing to build seasonal propositions.	<ul style="list-style-type: none"><li>• Independent professionals</li><li>• Active Boomers</li><li>• Conference &amp; Incentive market</li></ul>
	Australia	Grow our share of Australian outbound travellers, targeting winter and spring visitation, maximising opportunities through integrated consumer and trade marketing activity.	<ul style="list-style-type: none"><li>• Independent professionals</li><li>• Active Boomers</li><li>• Conference &amp; Incentive market</li></ul>
Pacific Rim	China	Influence high value segments to travel outside of peak Chinese travel seasons, specifically developing our winter and spring propositions, targeting tier 1 & 2 cities in China.	Influence high value segments to travel outside of peak Chinese travel seasons, specifically developing our winter and spring propositions, targeting tier 1 & 2 cities in China.
	North America	Target premium visitors across the channels, raising the profile of Queenstown in new ports as well existing ports	<ul style="list-style-type: none"><li>• High value young professionals &amp; active boomers</li><li>• Incentive market</li></ul>

# Market Matrix

Market Type	Market	Objective	Target Audiences
Pacific Rim	South East Asia	Grow Queenstown's share of New Zealand arrivals from SEA	<ul style="list-style-type: none"><li>• Independent professionals</li><li>• Incentive market</li></ul>
Long Haul	India	Target high value visitors that travel in autumn and spring, aiming to both grow overall Indian arrivals into Queenstown in shoulder months and increase length of stay.	<ul style="list-style-type: none"><li>• Family market (travel in May)</li><li>• Honeymoon market (travel October - January)</li><li>• Incentive market</li></ul>
	UK & Germany	Reenergise and reinforce our adventure credentials, specifically with the youth market.	<ul style="list-style-type: none"><li>• High value travellers of all styles</li><li>• Youth market</li></ul>
Emerging	Indonesia, Brazil & Argentina	Develop market entry strategy and leverage TNZ-led opportunities	<ul style="list-style-type: none"><li>• TBC</li></ul>

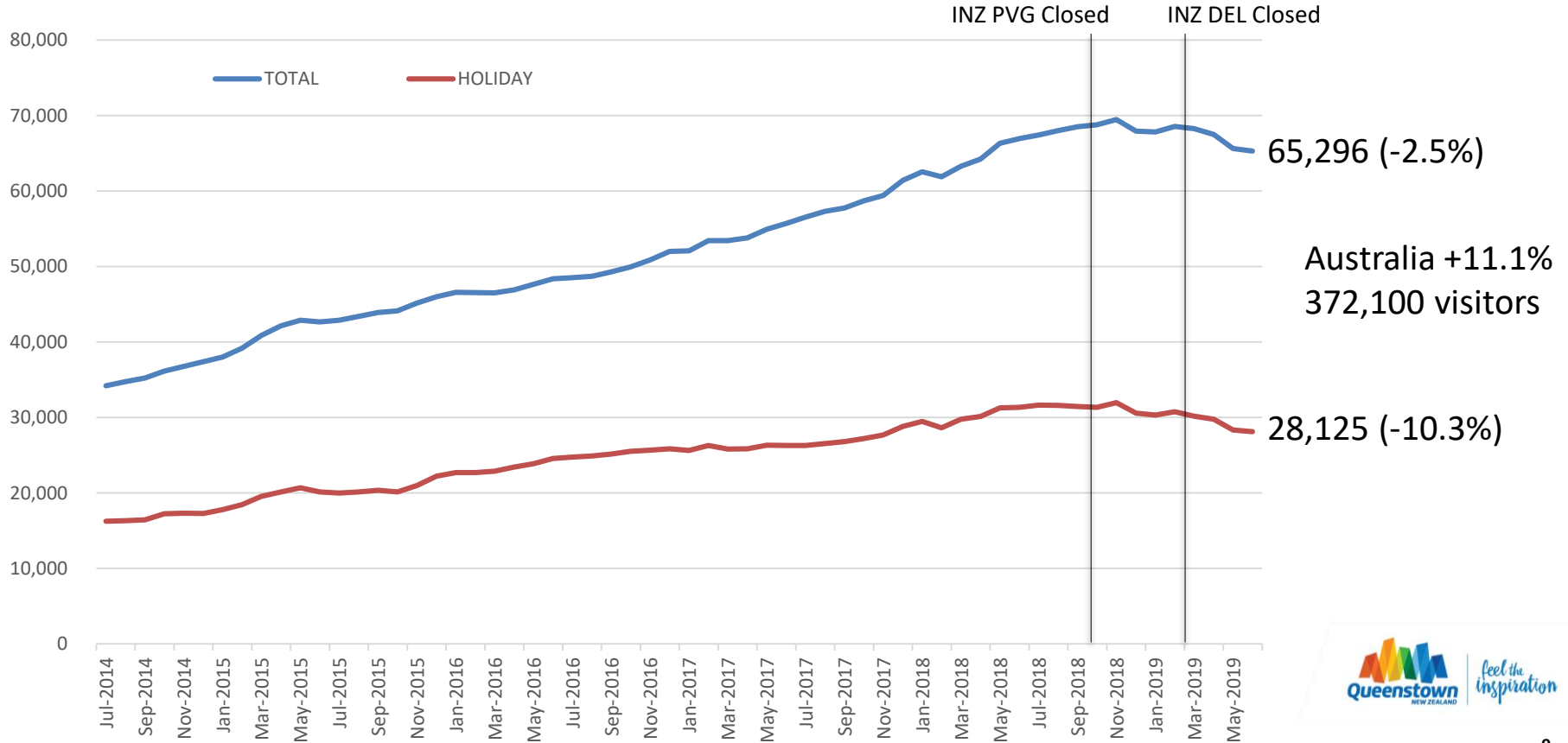


# Contents

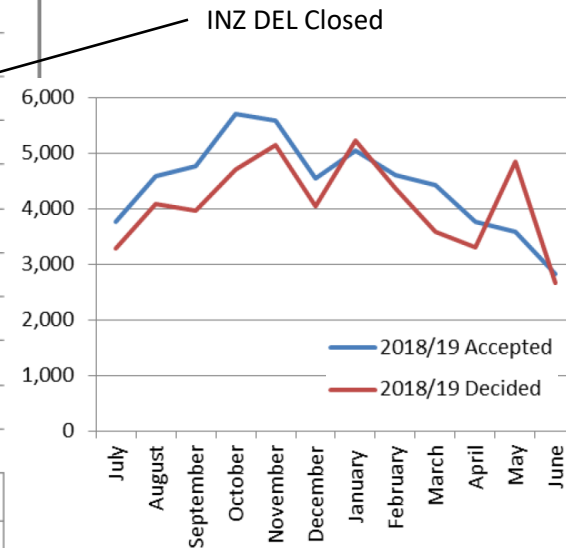
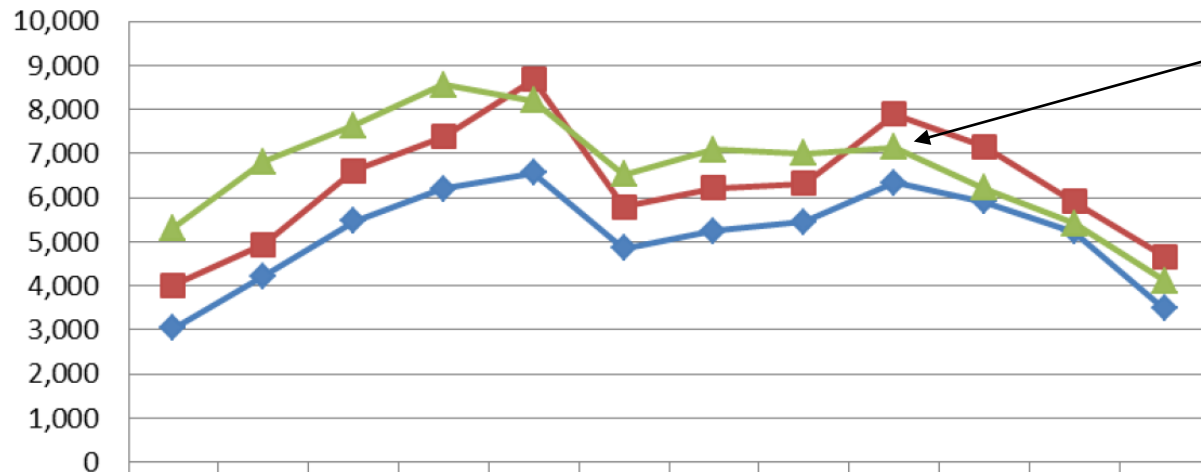
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# India Visitor Arrivals: 2014 to 2019



# INZ Visitor Visa Applications (India)



	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun
2016/17	3,035	4,219	5,474	6,201	6,556	4,849	5,240	5,457	6,339	5,918	5,223	3,480
2017/18	4,015	4,933	6,617	7,379	8,681	5,792	6,219	6,313	7,892	7,150	5,917	4,665
2018/19	5,310	6,819	7,637	8,565	8,195	6,527	7,091	6,998	7,138	6,211	5,420	4,121

# INZ Visitor Visa Applications (India)

## All General Visitor Visas

Nationality	Calendar Year Comparison		
	2017	2018	2019 (to 18 July)
	80% Decided Within <sup>3</sup>	80% Decided Within	80% Decided Within
China	6 days	10 days	16 days
India	15 days	17 days	32 days
All Other Nationalities	19 days	18 days	20 days

## Low Risk Visitor Visas

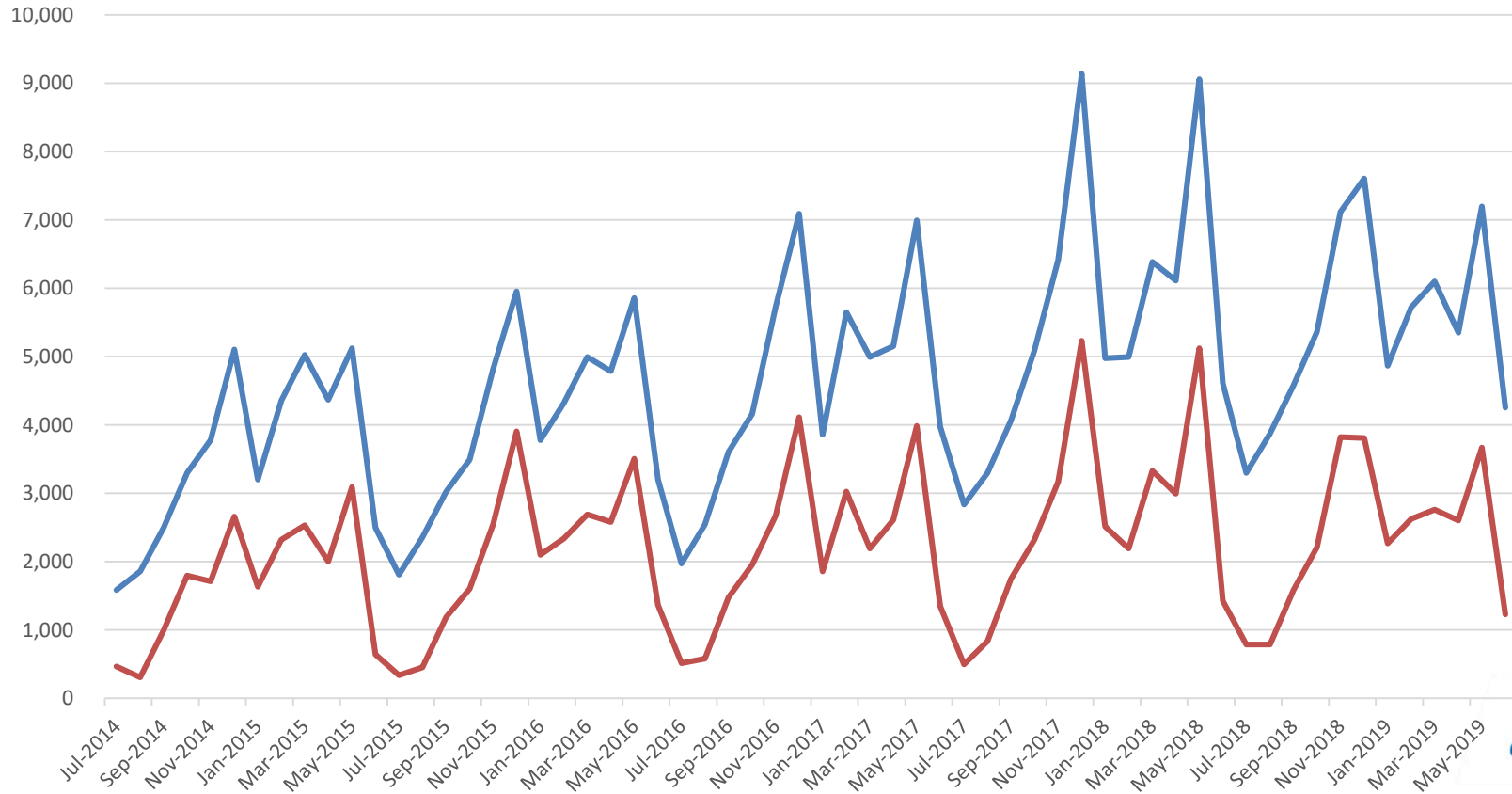
Nationality	Calendar Year Comparison		
	2017	2018	2019 (to 18 July)
	80% Decided Within	80% Decided Within	80% Decided Within
China	4 days	6 days	9 days
India	3 days	6 days	7 days
All Other Nationalities	6 days	8 days	9 days

# INZ Visitor Visa Applications (India)

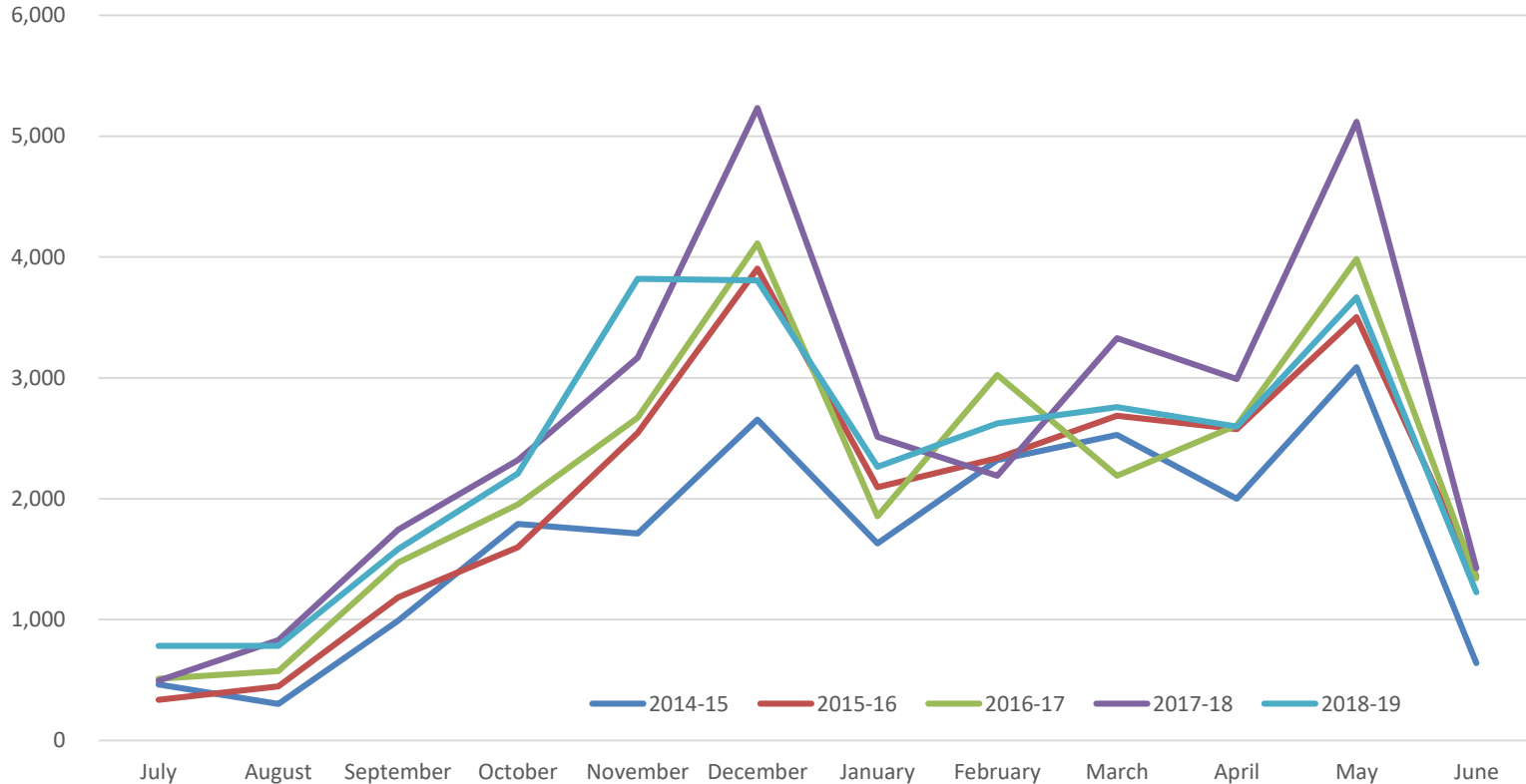
## Approval Rate

Nationality	Calendar Year Comparison					
	2017		2018		2019 (to 18 July)	
	Applications Decided	Approval Rate	Applications Decided	Approval Rate	Applications Decided	Approval Rate
China	162,184	93.8%	191,817	91.9%	89,364	91.8%
India	45,133	91.0%	50,274	89.0%	25,778	84.0%
All Other Nationalities	116,300	87.6%	123,282	86.0%	63,744	87.3%
<b>Total</b>	<b>323,617</b>	<b>90.8%</b>	<b>365,373</b>	<b>89.0%</b>	<b>178,886</b>	<b>89.1%</b>

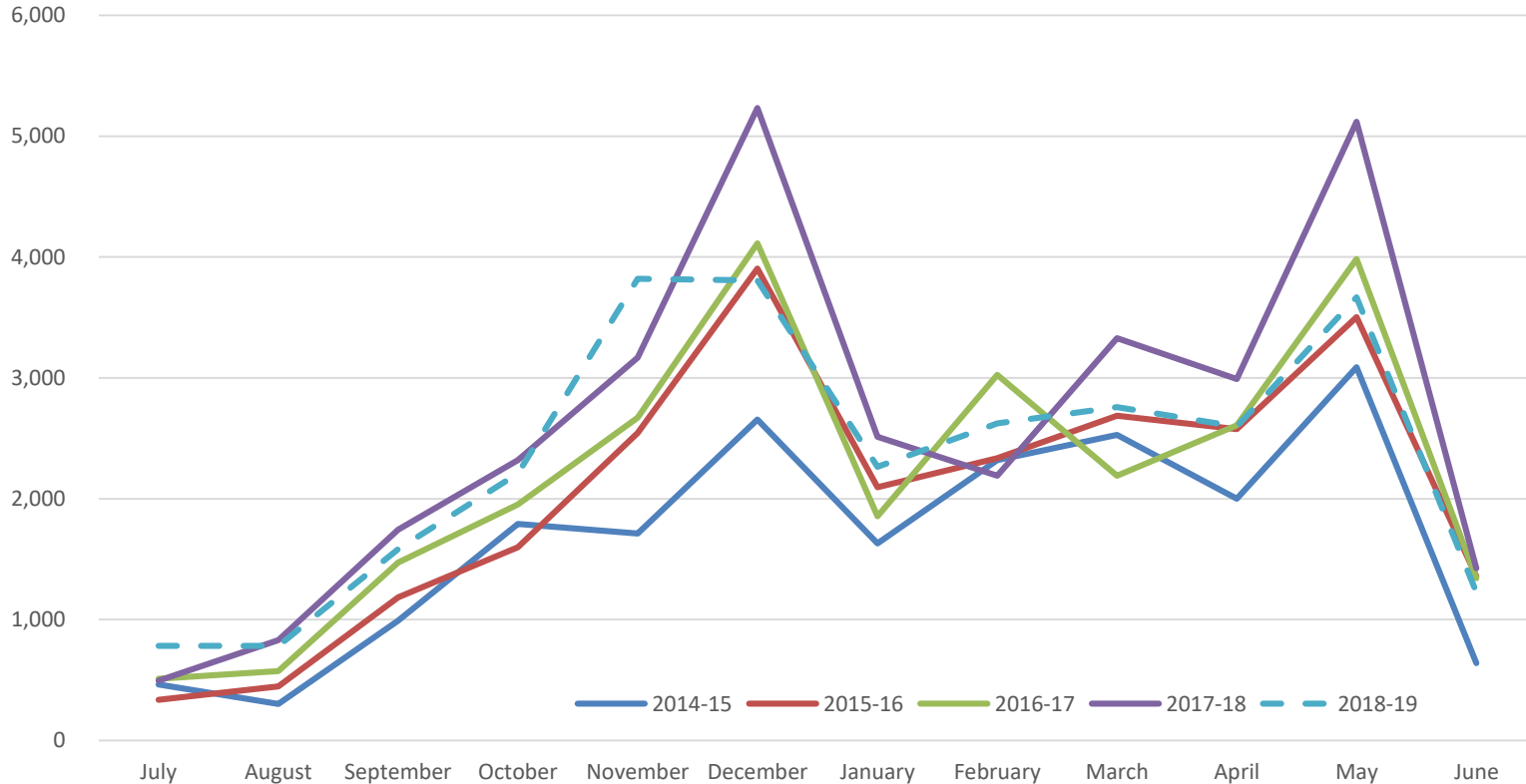
# India Seasonality: 2014 to 2019



# India Holiday Seasonality: 2014 to 2019

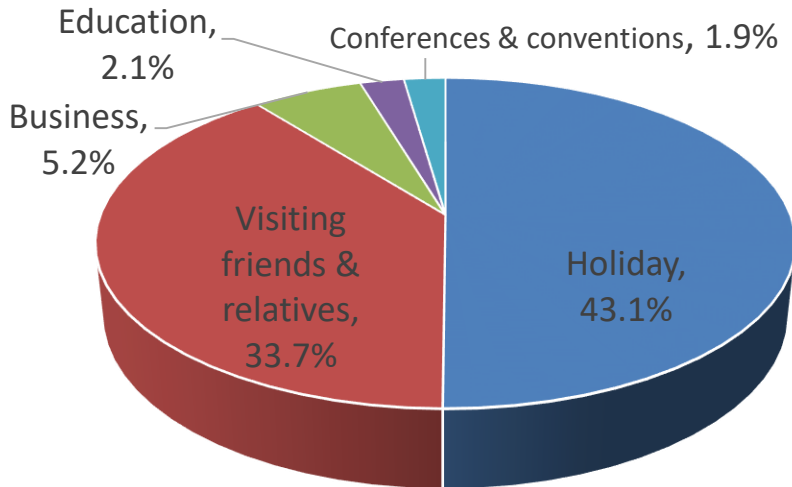


# India Holiday Seasonality: 2014 to 2019

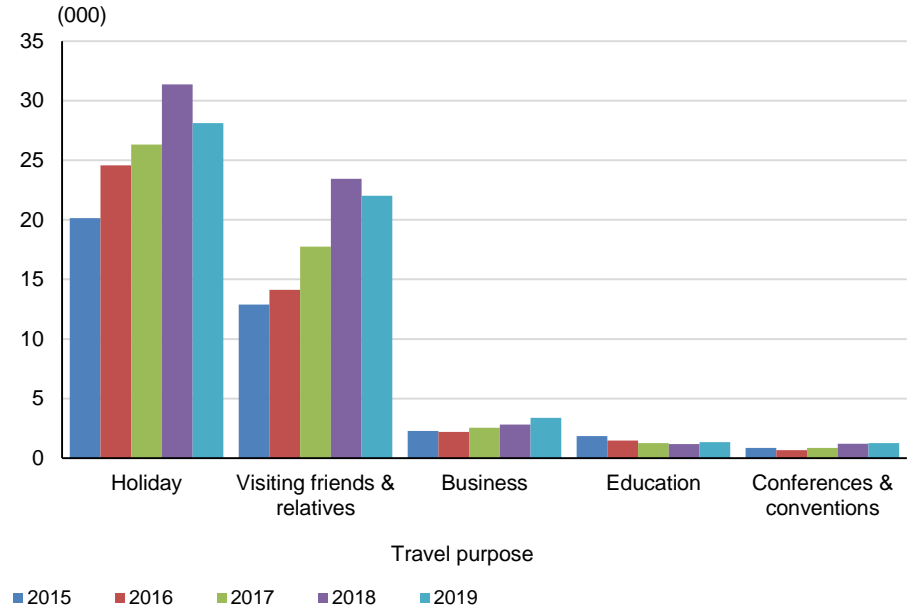




# Visitor Arrivals: 65,296 (-2.5%) YE June 2019

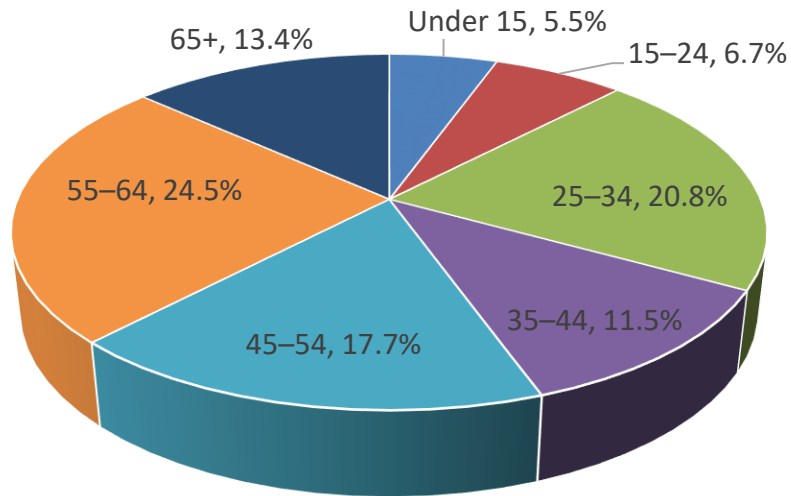


**Travel purpose of visitors from India**  
Year ended June 2015–19

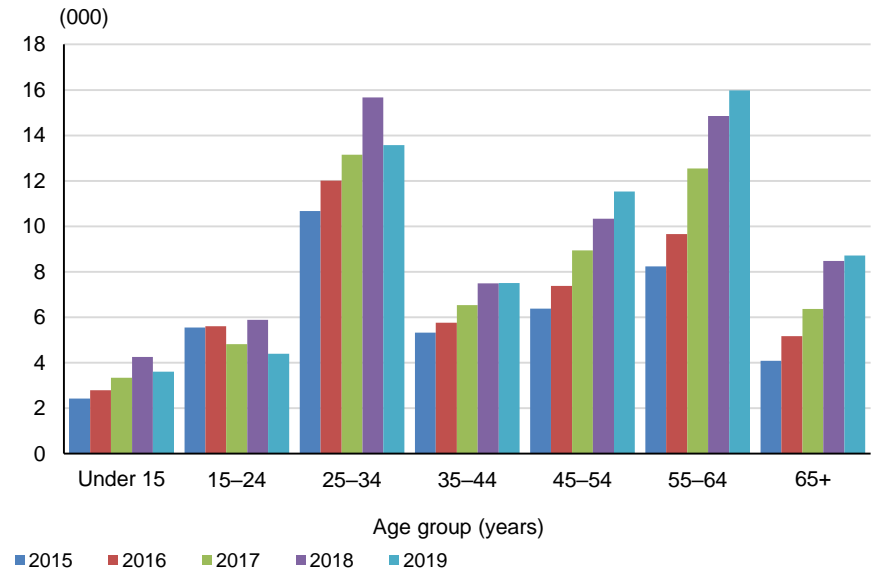


Source: Stats NZ

# Age Groups

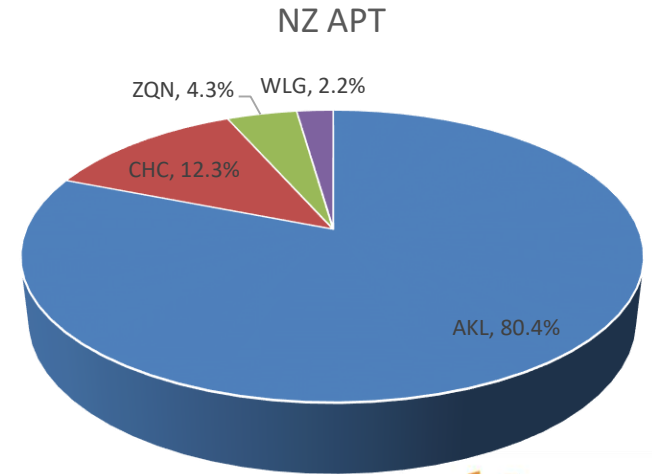
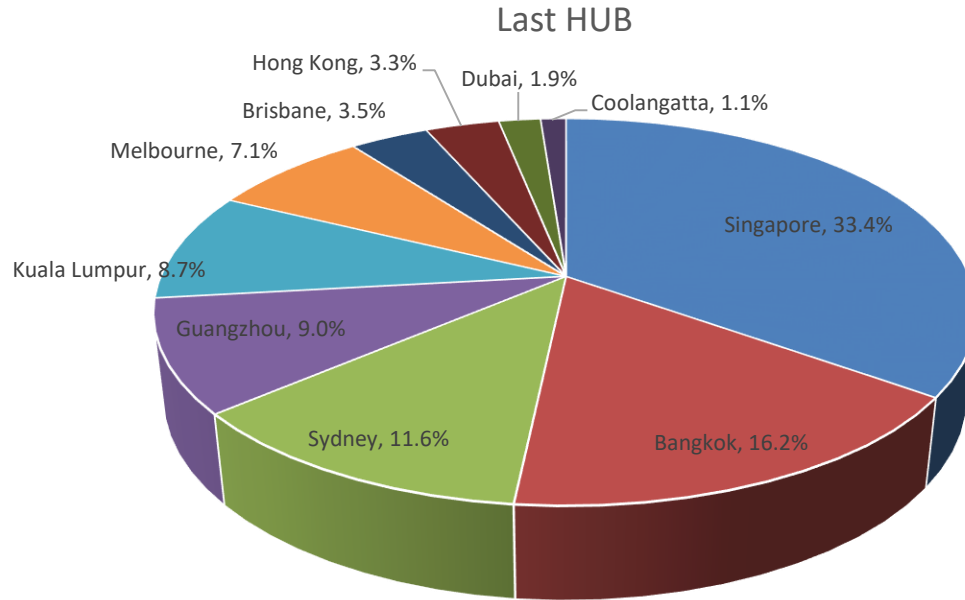


**Age of visitors from India**  
Year ended June 2015-19



Source: Stats NZ

# Aviation – Airline Market Share



AUS+NZ 23%  
Solo NZ 77%  
IVA YE April 2019



## Media Releases

(during the period 29 July 2019 to 19 August 2019)

[Air New Zealand and Singapore Airlines increase capacity between Auckland and Singapore](#)

14 August 2019

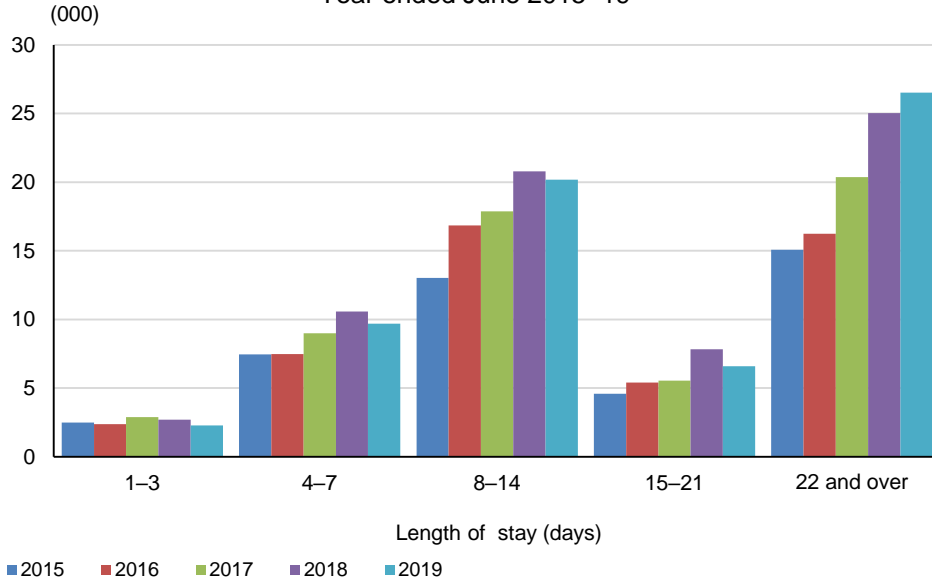
Joint Venture partners Air New Zealand and Singapore Airlines will boost capacity between Auckland and Singapore with an additional 35,000 seats between the end of March and October, commencing in 2020.

Air New Zealand will increase its frequency from 12 to 14 services per week on its Boeing 787 Dreamliner aircraft from 29 March 2020 to 24 October 2020, bringing the total number of services the two alliance partners operate to 21 per week.

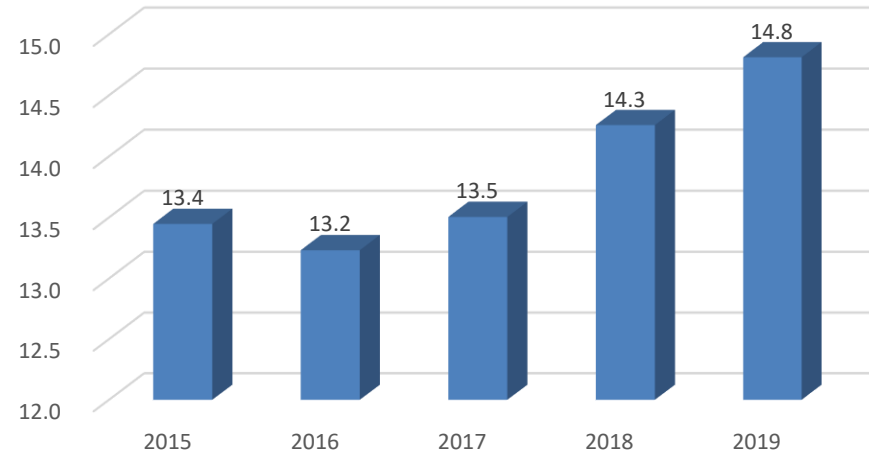
Singapore Airlines will also deploy its larger A380 aircraft to meet strong demand over the Easter 2020 peak, replacing its scheduled Boeing 777-300ER aircraft.

# Length of Stay

**Length of stay of visitors from India**  
Year ended June 2015–19



Median Length of Stay



Longest Length of Stay in Asia 12.5 days  
High Value Market 20+ Activities Included



# TNZ India

TNZ targets Independent Professionals

80% book thru Travel Agents

60% of New Zealand arrivals are FIT

## TNZ Partners

- Thomas Cook India
- SOTC
- Kulin Kumar Holidays
- MakeMyTrip.com
- Yatra.com



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# Outbound Market

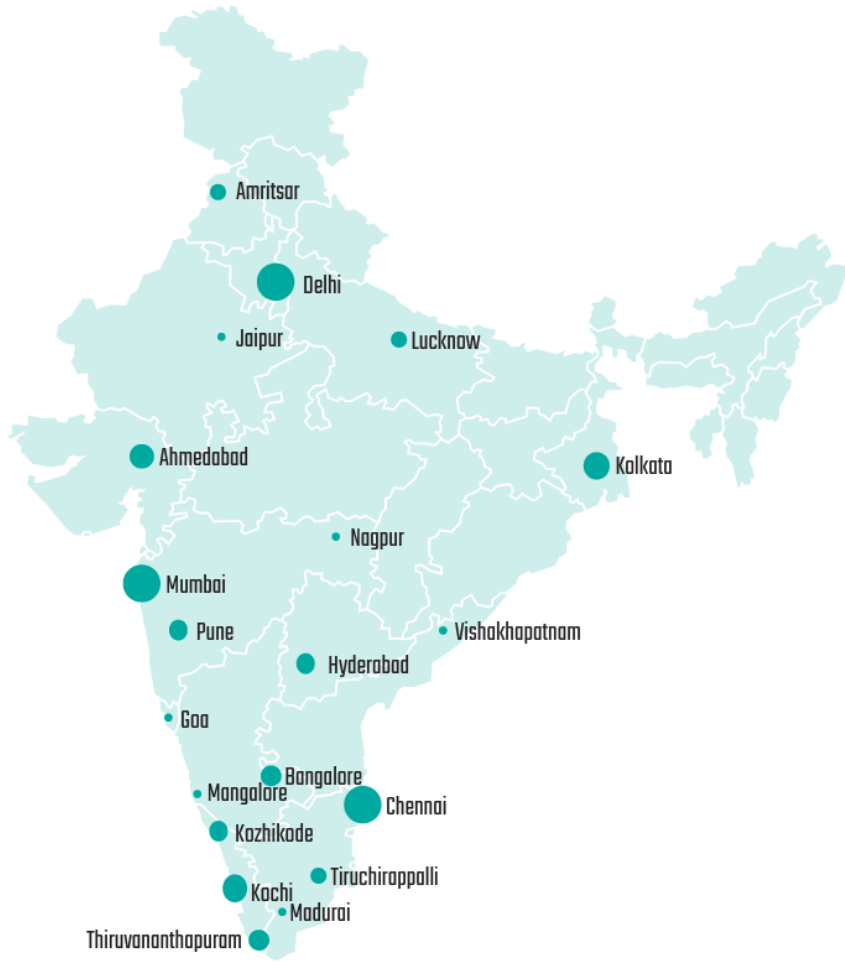
## 70x NTOs



# Top 10 Destinations (2016)

S.NO	TOP OVERALL DESTINATIONS	NUMBER OF OUTBOUND TRAVELLERS ('000)	TOP LEISURE DESTINATIONS	NUMBER OF OUTBOUND TRAVELLERS ('000) <sup>7</sup>
1	Dubai	1,800	Dubai	1,168
2	Saudi Arabia	1,479	Thailand	957
3	Bahrain	1,245	France	480
4	US	1,172	Singapore	472
5	Thailand	1,160	Malaysia	383
6	Kuwait	1,152	Sri Lanka	293
7	Singapore	1,097	Hong Kong	274
8	China	776	Indonesia	245
9	Malaysia	639	US	211
10	France	600	Switzerland	193

# ORIGIN POINTS OF OUTBOUND LEISURE TRAVELLERS (2016)

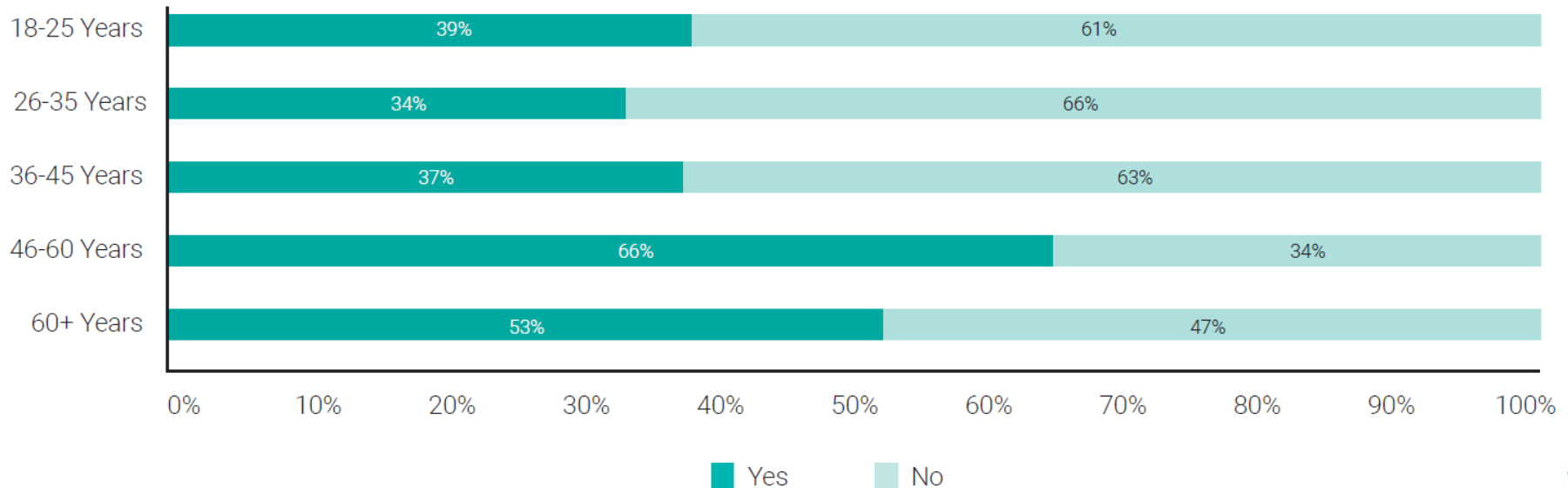


CITIES	ESTIMATED LEISURE TRAFFIC (2016)	CAGR (2012-16)
Delhi	1,155,380	8%
Mumbai	930,484	6%
Chennai	663,865	6%
Kolkata	388,667	11%
Bangalore	373,375	14%
Kochi	342,242	22%
Hyderabad	297,926	16%
Kozhikode	157,456	7%
Ahmedabad	146,479	22%
Thiruvananthapuram	138,128	7%
Lucknow	97,662	23%
Tiruchirappalli	84,709	7%
Mangalore	75,291	36%
Pune	72,120	58%
Jaipur	66,350	26%



# 35% of Population Vegetarian

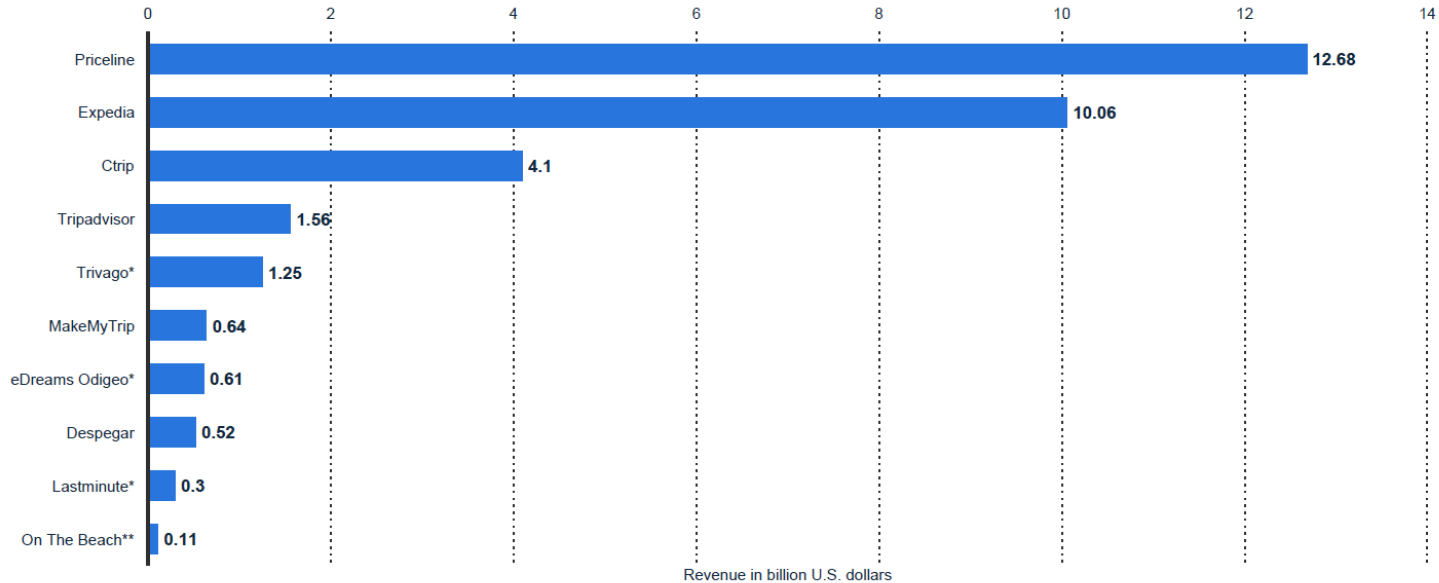
## AVAILABILITY OF INDIAN/VEGETARIAN FOOD AFFECTS THE CHOICE OF DESTINATION



# Distribution Channels

Leading online travel agencies (OTA's) worldwide by revenue in 2017 (in billion U.S. dollars)

Revenue of leading online travel agencies (OTA's) worldwide 2017



Note: Worldwide; 2017

Further information regarding this statistic can be found on [page 46](#).

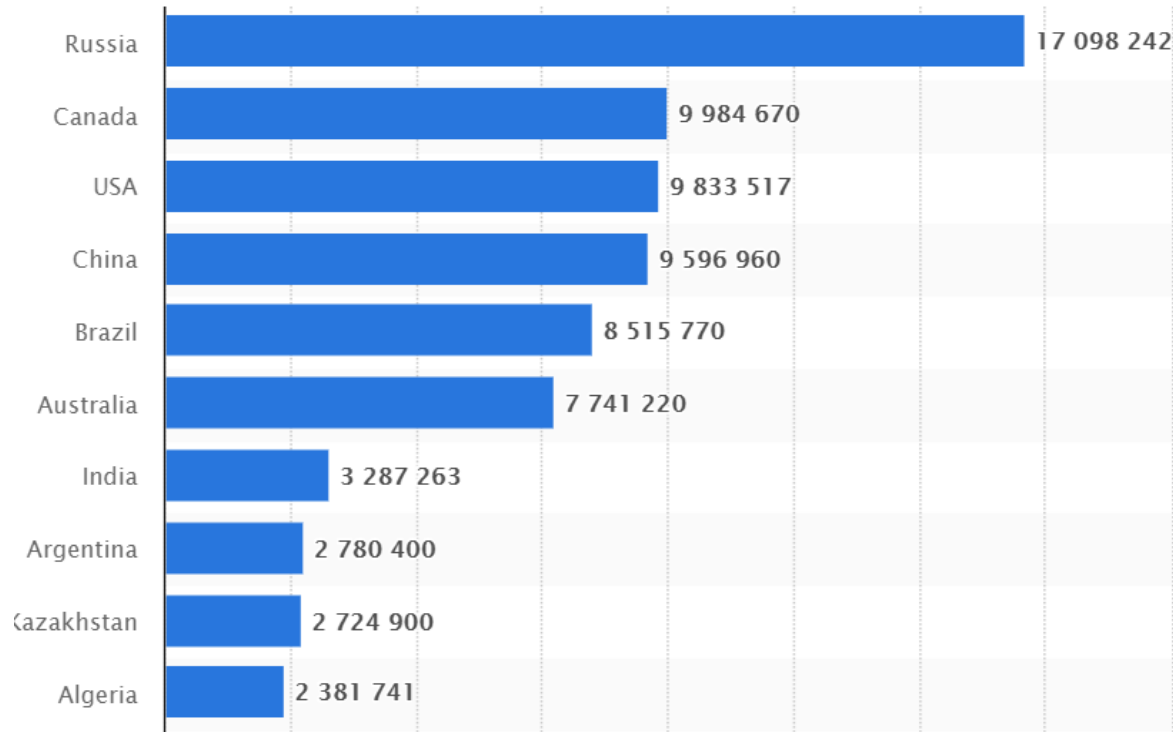
Source(s): Medium; [ID 934995](#)

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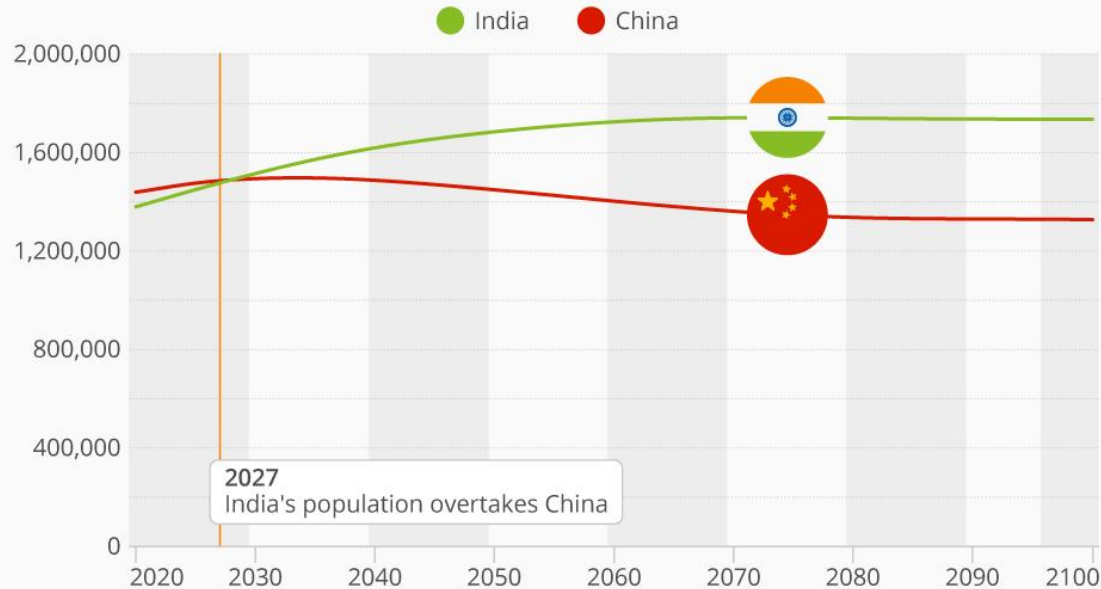
# 6<sup>th</sup> Largest Country (3.28m Sq Kms)



# Population

## India's Population Is Expected To Overtake China's In 2027

Estimated growth in India and China's population up to 2100

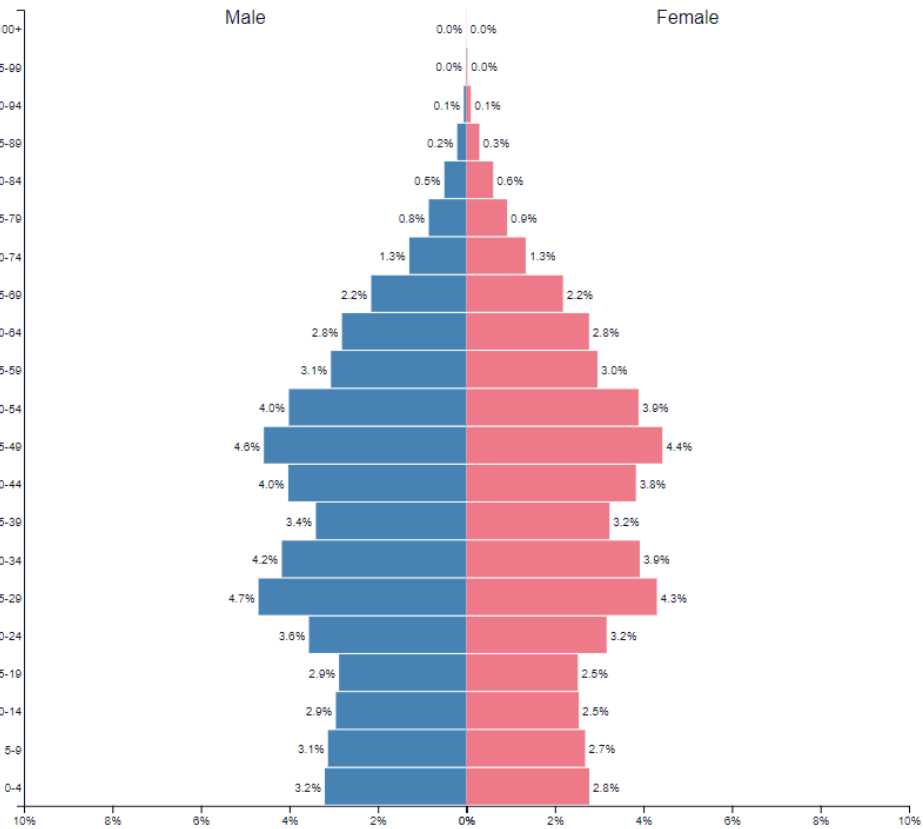
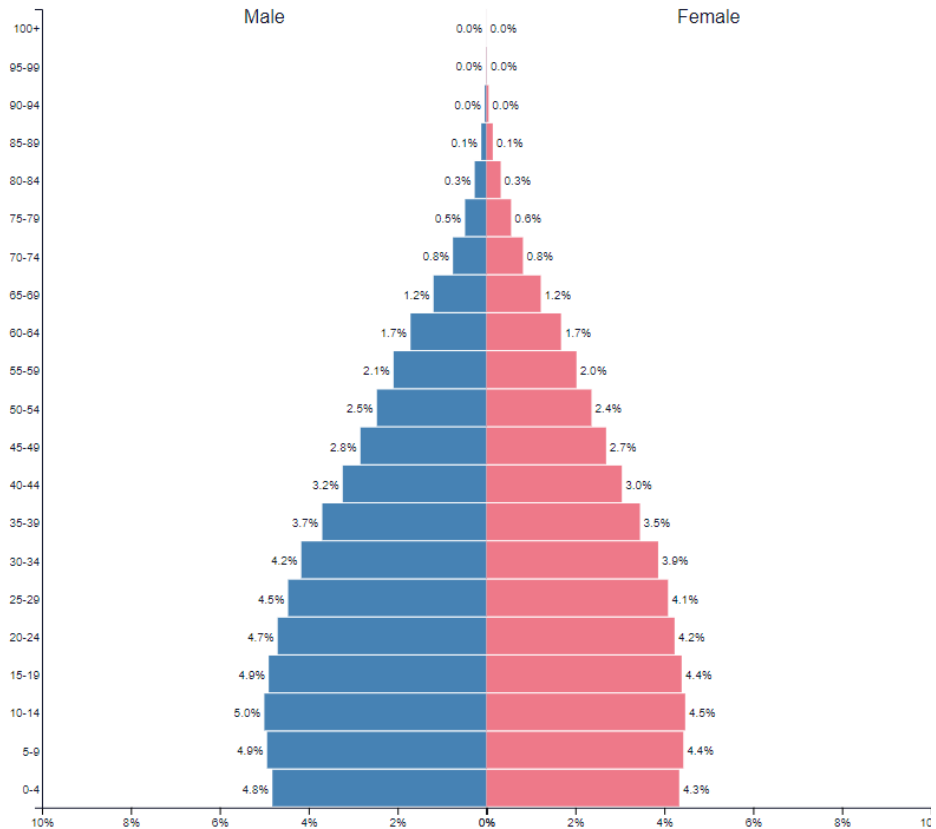


India ▼  
2017

Population: 1,342,512,705 2017

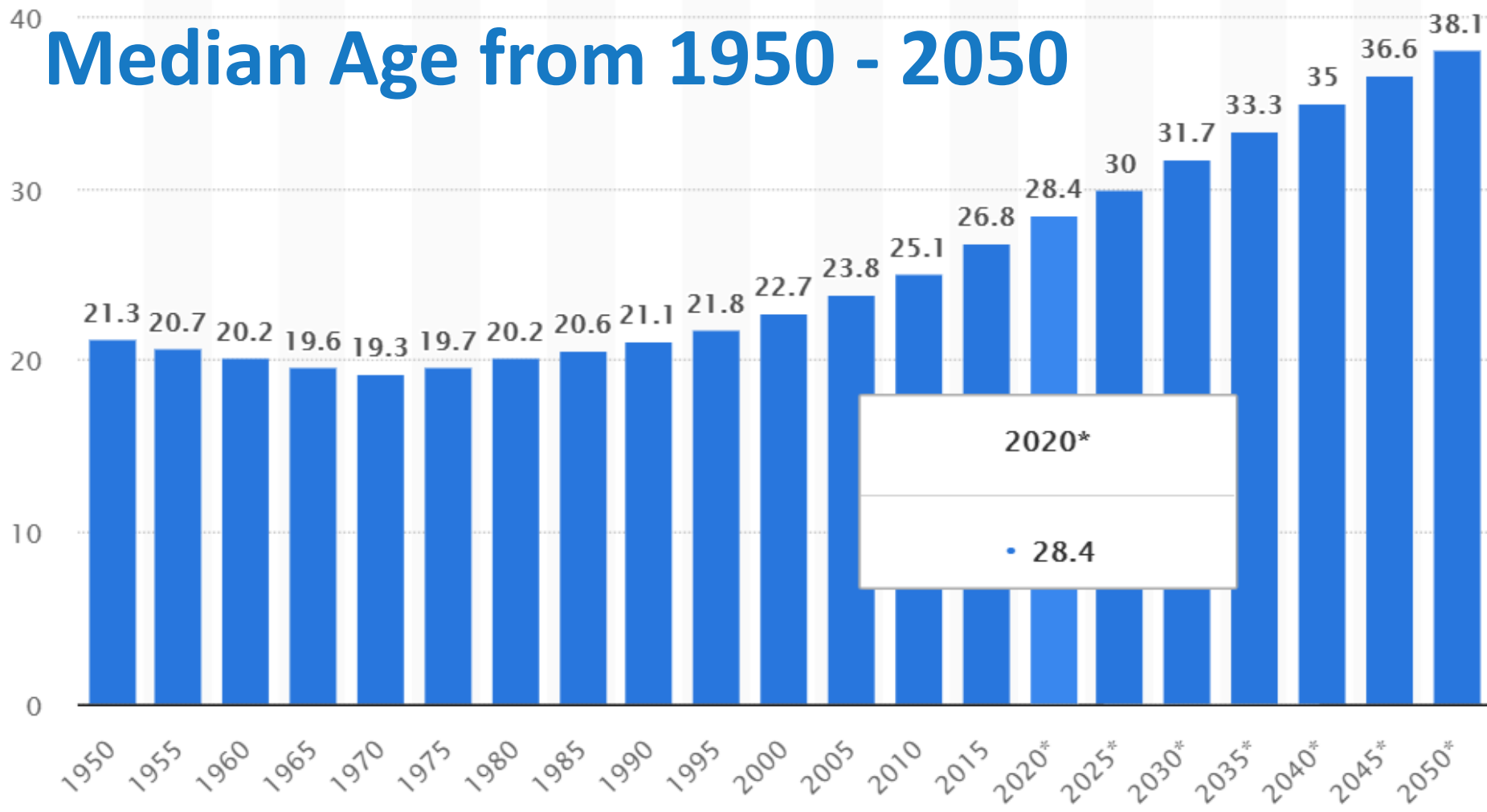
China ▼

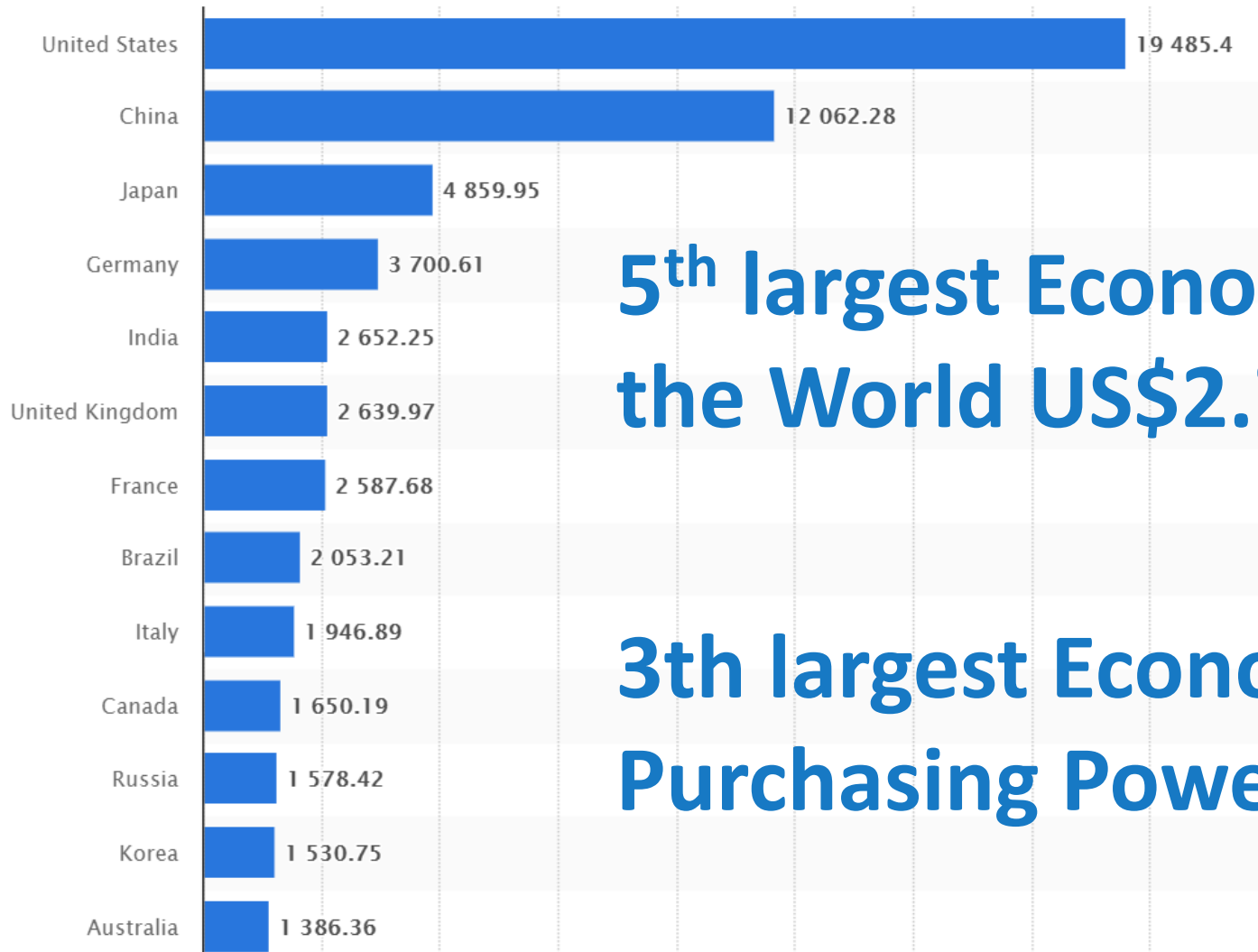
Population: 1,388,232,692



# Median Age from 1950 - 2050

Median age in years

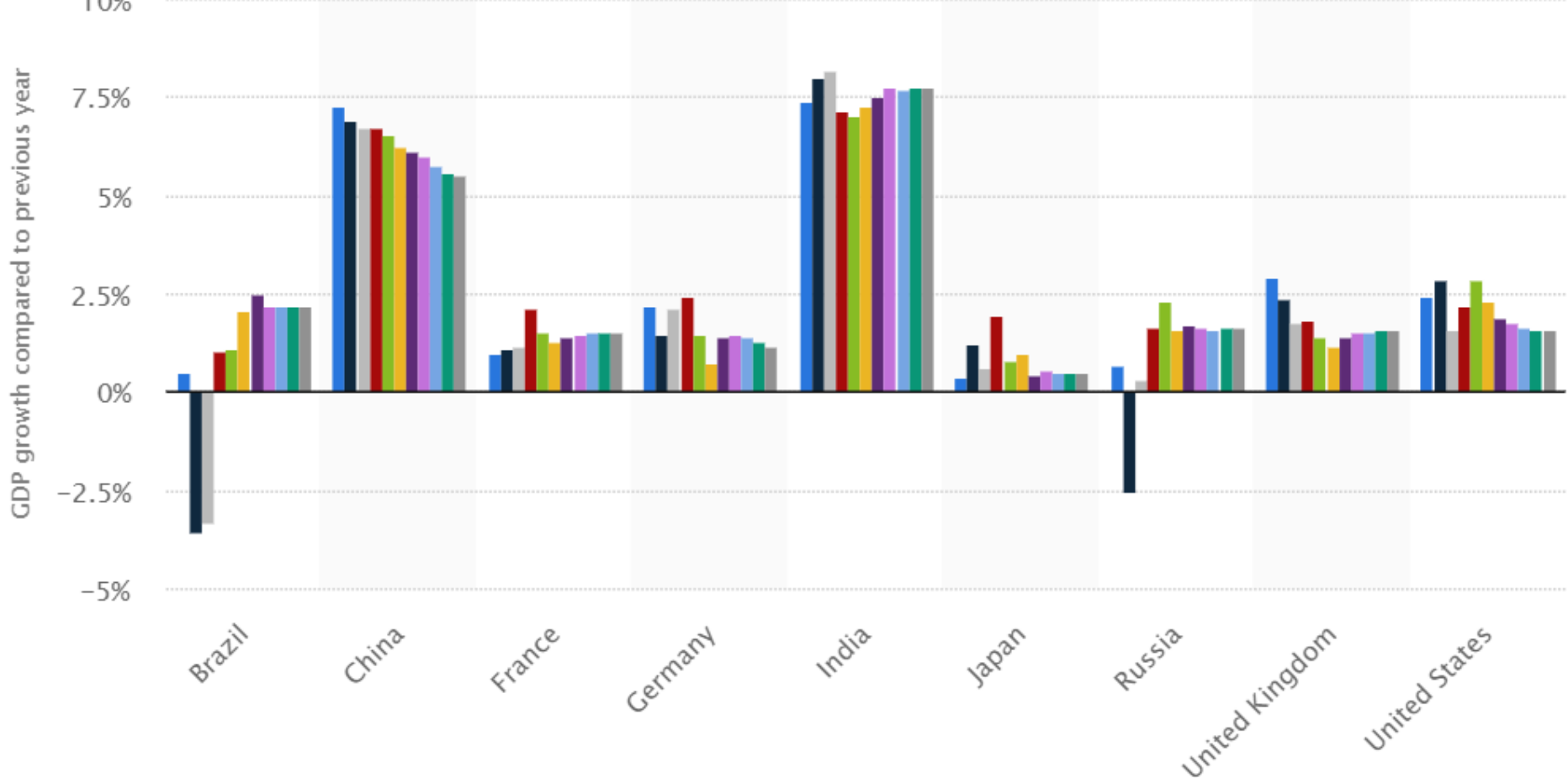




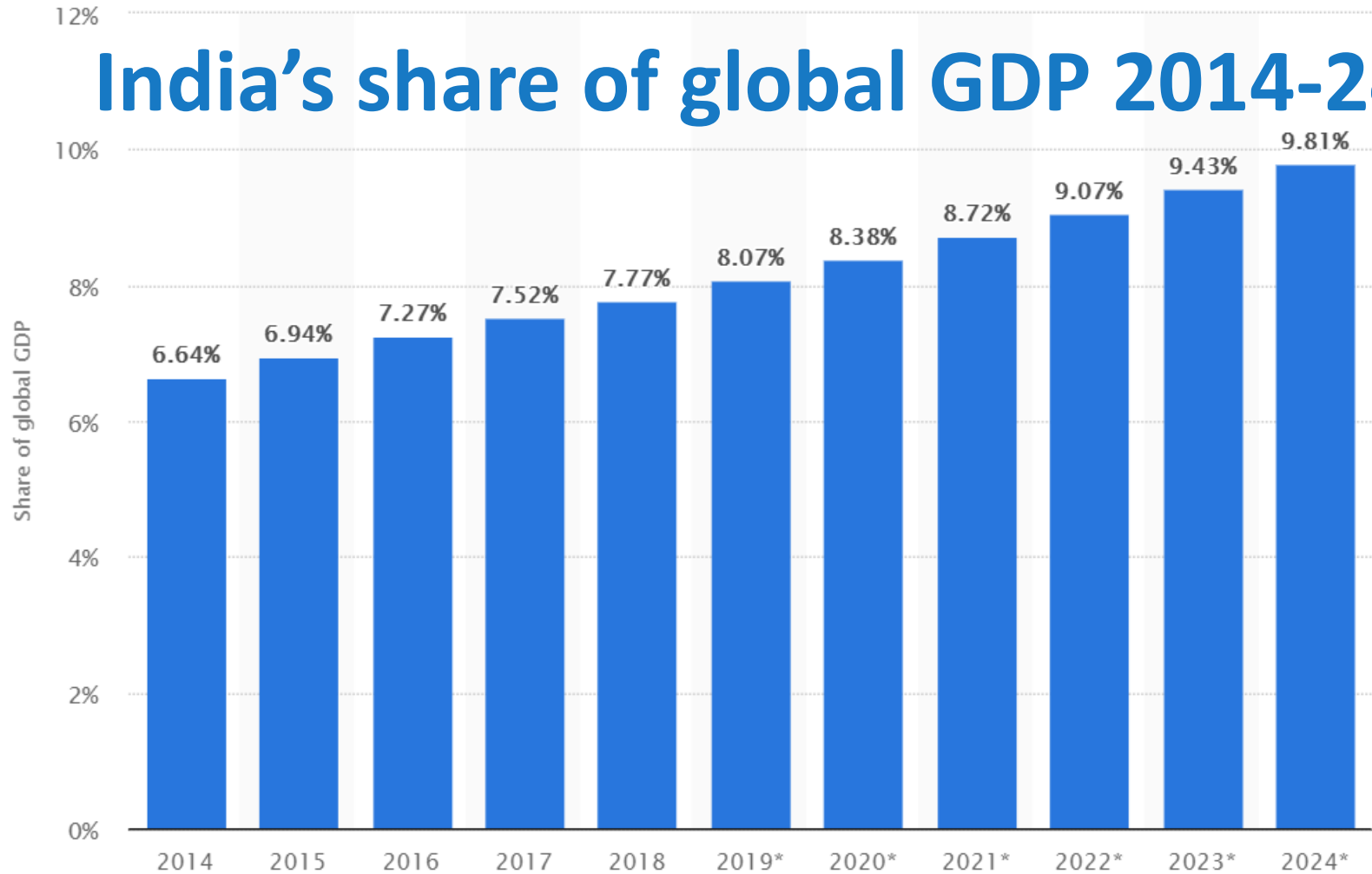
**5<sup>th</sup> largest Economy in  
the World US\$2.7 Tr**

**3<sup>th</sup> largest Economy by  
Purchasing Power Parity**

# GDP Growth 2014 to 2024



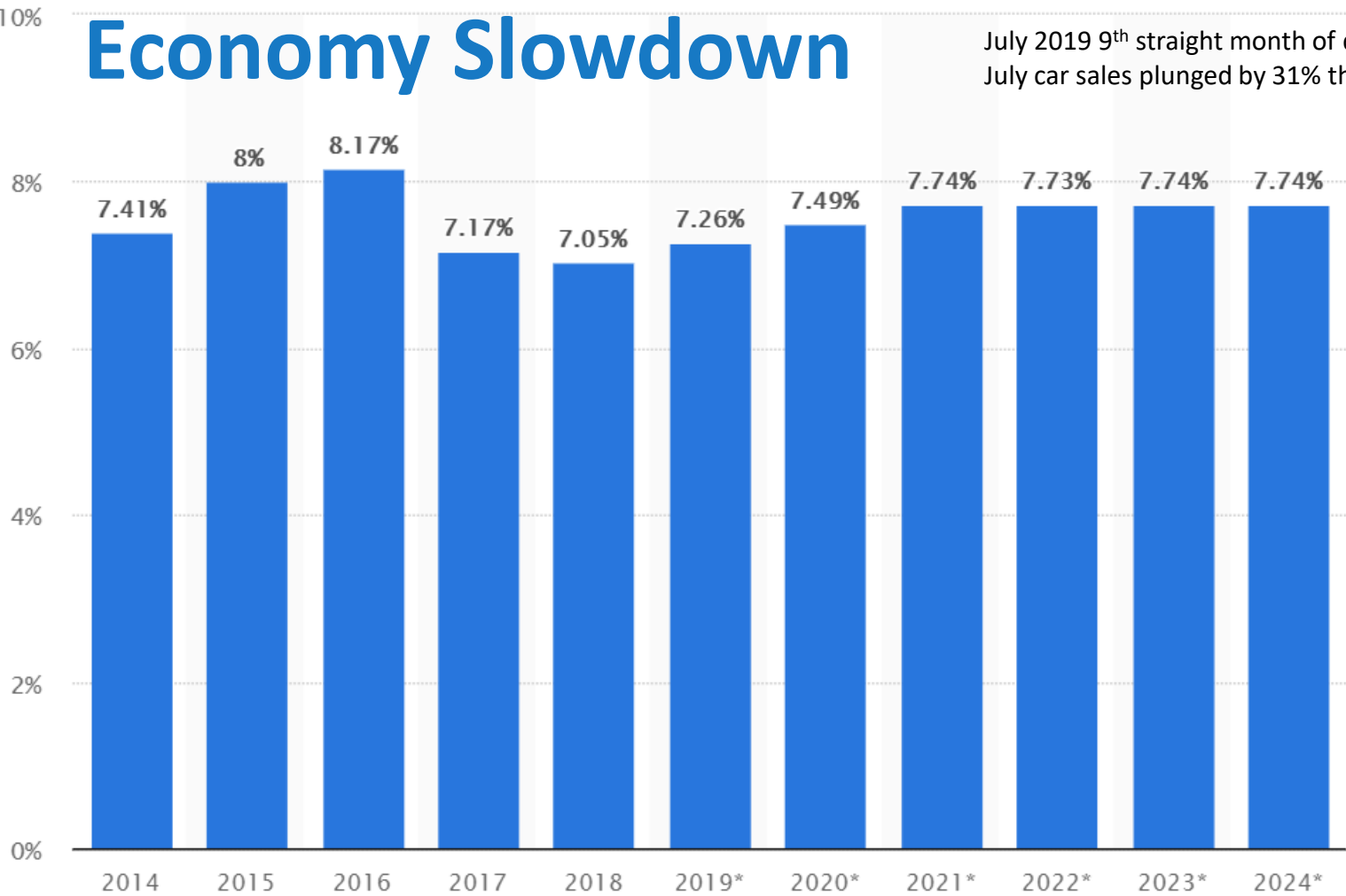
# India's share of global GDP 2014-24



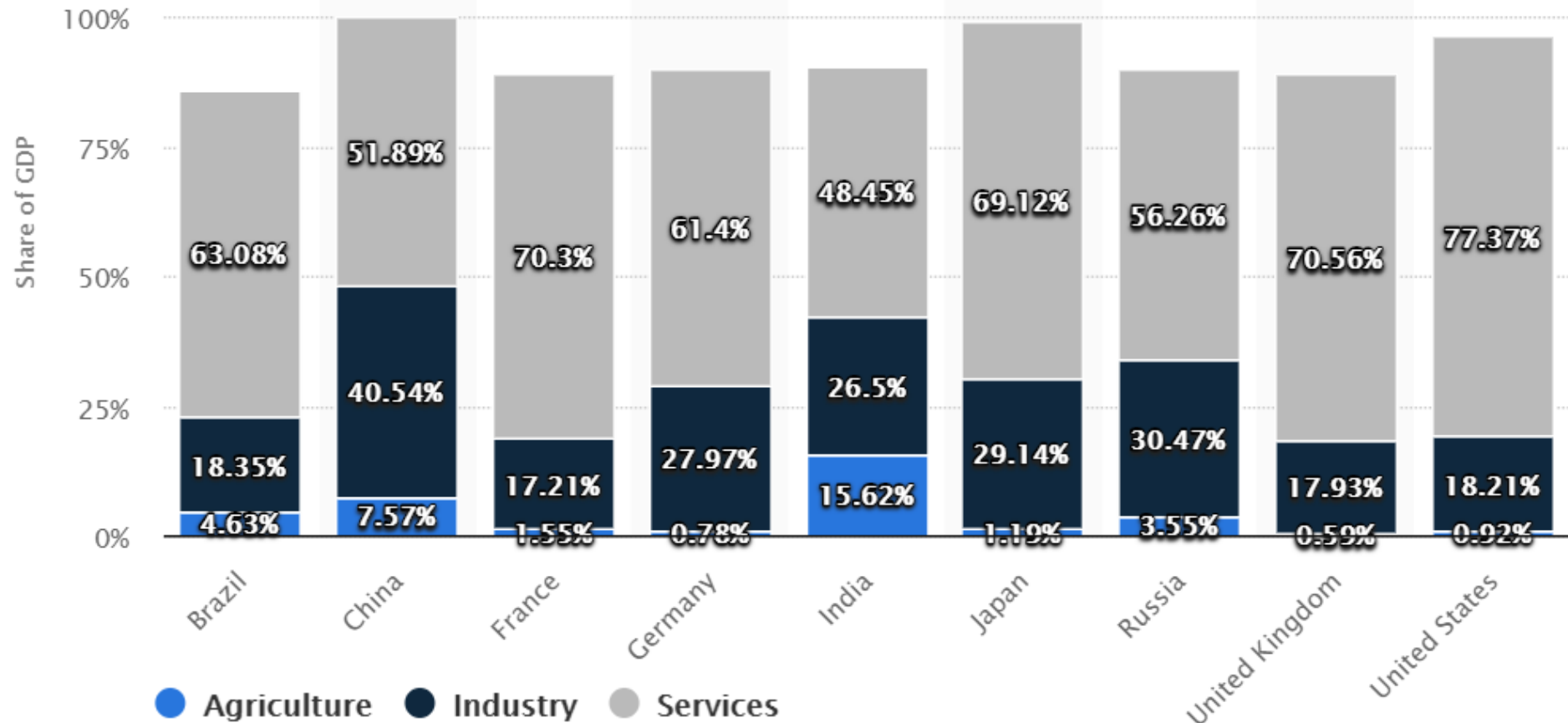


# Economy Slowdown

July 2019 9<sup>th</sup> straight month of decline in car sales  
July car sales plunged by 31% the sharpest drop in 18 years



# Economic Sectors % of GDP (2017)



# Cafe Coffee Day shares slump 20% to hit all-time low after founder VG Siddhartha goes missing

Shares of Coffee Day Enterprises plunged 20% in the early trading session on Tuesday after Cafe Coffee Day founder VG Siddhartha was reported missing.

BusinessToday.In Last Updated: July 30, 2019 | 18:47 IST



# How did it go this bad for Anil Ambani? The unmaking of a billionaire

Anil Ambani has been told to pay Ericsson Rs 453 crore by Tuesday or face jail.

ET Online | Updated: Mar 16, 2019, 07:36 PM IST

Facebook, Twitter, LinkedIn, WhatsApp, and other social media sharing icons.

64 Comments

Save, A+, Print, Email, and other utility icons.



RCom-Ericsson case: NCLAT refuses to direct SBI to release Rs 259 cr

Anil Dhirubhai Ambani was listed by Forbes in 2008 as the world's sixth-wealthiest person. Eleven years later, the 59-year-old is fighting to save his reputation and a possible jail sentence.

An appellate tribunal on Friday refused to direct State Bank of India and other lenders to Reliance Communications to release Rs 260 cr of tax refunds, held in a trust fund, a sum needed to pay the firm's dues to Ericsson.

The order passed by National Company Law Appellate Tribunal is a setback for RCom [NSE -4.00 %], which must pay the Swedish telecom gear maker its remaining dues of Rs 453 crore by Tuesday to ensure Ambani doesn't go to jail. The telco has already paid Rs 118

NEW ZEALAND

# Airline Closures: Kingfisher & Jet Airways

live**mint**



Vijay Mallya. Photo: Mint  
(Mint)

## DGCA suspends Kingfisher Airlines licence

5 min read . Updated: 21 Oct 2012, 07:50 PM IST

P.R. Sanjai

## India's 2nd-largest airline is shutting down after running out of money

GRAHAM RAPIER

APR 18, 2019, 12:05 AM



- **Jet Airways**, the embattled Indian airline, confirmed on Wednesday that it would shut down operations.
- Jet, the second-largest carrier in India by passengers served, has been racking up debt for months.
- The company said that it could not pay “for fuel or other critical services” and that its last flight would land on Wednesday.

The embattled Indian airline **Jet Airways** said on Wednesday that it would shut down operations, [confirming reports from Reuters](#).

# Demonetisation drive that cost India 1.5m jobs fails to uncover 'black money'

Costly banknote recall did not flush out untaxed wealth, as PM Narendra Modi had promised



▲ The demonetisation drive in India caught people by surprise and wiped at least 1% off the country's GDP.

November 2016

Rs. 1,000 & Rs. 500 void

86% Currency

Cost 1.5m Jobs; 1.5% GDP

100 deaths

99.3% money back in Circ

209,000 new tax filers

# BSE SENSEX

INDEXBOM: SENSEX

**37,485.90** +135.57 (0.36%) ↑

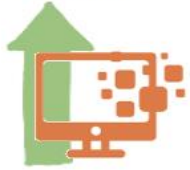
19 Aug, 9:42 am GMT+5:30 · Disclaimer





# Size and Complexity

## What's Hot?



Digital and Social Media



Instant news



User generated content



Snackable - on the move content



### Print

1,05,443 newspapers across multiple languages

### Internet

87 % of digital news readers in India  
566 million internet users, the world's 2nd largest online market after China

### TV

892 news channels in 22 languages in an multi-channel universe

### Radio

369 operational private radio stations in more than 101 cities and towns across India

Source- <https://www.google.com/webhp?hl=en&sa=X&ved=0ahUKEwjKlvCvypjjAhXPeisKHYEKA8gQPAgH>



**100% PURE  
NEW ZEALAND**

# We are a social community

627 million active internet users



Source : FB, Social Samosa, Instagram, YouTube, Snapchat

Reliance Jio launched in Sep 2016  
100 million users in first six months





# India Likely To Produce 70 Millionaires Every Day Between 2018 And 2022: Report

India's top 1 per cent holds 51.53 per cent of the national wealth, according to the report.

Press Trust of India



AdChoices

**TRENDING**

iation

# #13 Mukesh Ambani

Founder and Chairman, Reliance Industries



REAL TIME NET WORTH

as of 8/18/19

**\$50.2B**



- Mukesh Ambani chairs and runs \$90 billion (revenue) oil and gas giant Reliance Industries, among India's most valuable companies.
- Reliance was founded by his late father Dhirubhai Ambani, a yarn trader, in 1966 as a small textile manufacturer.



## Antilia

Building



Antilia is a private home in South Mumbai, India. As of November 2014, it is valued at \$2 billion, deemed to be the world's second most valuable residential property, after British crown property Buckingham Palace, and the world's most valuable private residence. [Wikipedia](#)

**Floors:** 27

**Area:** 4,532 m<sup>2</sup>

**Cost:** US \$1 - \$2 billion

**Location:** Altamount Road, Cumballa Hill, Mumbai

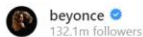
Wealth Culture

# Beyoncé Meets Bollywood as Daughter of Asia's Richest Man Weds

By [P.R. Sanjai](#) and [Anto Antony](#).

December 11, 2018, 12:28 AM GMT+13 Updated on December 11, 2018, 11:51 PM GMT

- ▶ Daughter of Asia's richest man to wed Indian tycoon's son
- ▶ Hillary Clinton, KKR's Henry Kravis among guests at wedding

beyoncé  
132.1m followers[View Profile](#)*The New York Times*

## N Beyoncé, Bhangra and a Bill PL in the Millions: The Wedding That Has India Obsessed

Isha Ambani, the daughter of one of Asia's richest men, is marrying a childhood friend in Mumbai on Wednesday. The weeklong celebrations are on a scale rivaling royalty.



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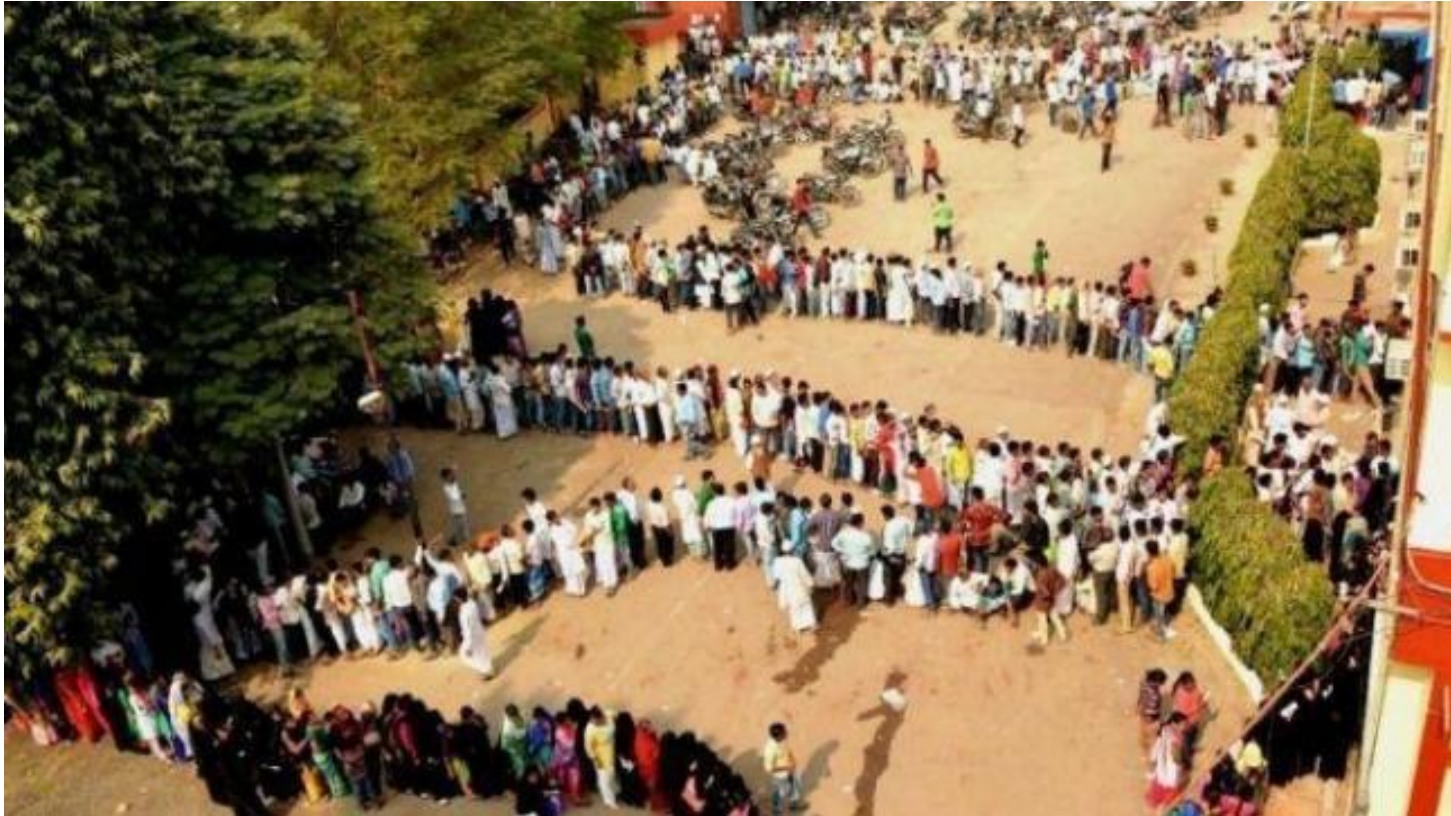
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# India's first IKEA store brings traffic to a standstill on opening day



# Demonetization – ATM Qs





# India's Most Crowded Station In Mumbai. Central Railway's Dadar Station At Night In Monsoon



0:55 / 2:00

Scroll for details



















# Bollywood

1,986 movies in 2017

3.6 billion tickets Vs 2.6 billion Hollywood tickets

Top 20 richest actors in the world:

1. Shah Rukh Khan \$600m
2. Tom Cruise \$570m
3. George Clooney \$500m
4. Mel Gibson \$425m
5. Adam Sandler \$420m
6. Amitabh Bachchan
7. Jack Nicholson
8. Sylvester Stallone
9. Arnold Schwarzenegger
10. Mary Kate & Ashley

11. Clint Eastwood
12. Jackie Chan
13. Keanu Reeves
14. Sean Connery
15. Tom Hanks
16. Micheal Douglas
17. Will Smith
18. Robert Downey Jr.
19. Robert De Niro
20. Brad Pitt

Source: [www.wealthygorilla.com](http://www.wealthygorilla.com)

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Business

# IndiGo Budget Airline Prepares for Another 'Large' Airbus Order

By [Anurag Kotoky](#)

May 7, 2019, 3:40 PM GMT+12 *Updated on May 8, 2019, 2:32 AM GMT+12*

- ▶ Indian airline talking to Airbus to buy new A321 XLR jets
- ▶ IndiGo is also considering CFM engines for A320neo aircraft



In 2014 IndiGo placed order for 250x A-320 aircrafts US\$ 26.5 billion

In July 2016, Go Air doubled the size of its earlier order of A-320 neo to 144

Spice Jet ordered 205 of Boeing's 737 MAX

Domestic Traffic 8x in 20 years

34 new airports since Jan 2018

100 new airports over next 15 years

1000 aircraft orders Vs 700 now











# Aviation – BOMDEL #3 Globally

## The Busiest Air Routes Worldwide

Number of departures on the world's busiest air routes (Mar 2018-Feb 2019)

Route	Departures	Distance (miles)
 Jeju → Seoul Gimpo	79,460	282
 Melbourne → Sydney	54,102	443
 Mumbai → Delhi	45,188	715
 Rio de Janeiro → Sao Paulo Congonhas	39,747	222
 Fukuoka → Tokyo Haneda	39,406	549
 Hanoi → Ho Chi Minh City	39,291	623
 Sapporo → Tokyo Haneda	39,271	509
 Jakarta → Surabaya	37,762	374
 Los Angeles → San Francisco	35,365	337
 Jeddah → Riyadh	35,149	460









## Media Releases

(during the period 29 July 2019 to 19 August 2019)

[Air New Zealand and Singapore Airlines increase capacity between Auckland and Singapore](#)

14 August 2019

Joint Venture partners Air New Zealand and Singapore Airlines will boost capacity between Auckland and Singapore with an additional 35,000 seats between the end of March and October, commencing in 2020.

Air New Zealand will increase its frequency from 12 to 14 services per week on its Boeing 787 Dreamliner aircraft from 29 March 2020 to 24 October 2020, bringing the total number of services the two alliance partners operate to 21 per week.

Singapore Airlines will also deploy its larger A380 aircraft to meet strong demand over the Easter 2020 peak, replacing its scheduled Boeing 777-300ER aircraft.





Air India will be relieved of ₹29,000 crore of debt as part of the turnaround plan being executed.

## Govt plans waiver of ₹29,000 crore in Air India debt

1 min read . Updated: 30 Nov 2018, 11:45 AM IST

[Gireesh Chandra Prasad](#)

Transferring the large chunk of Air India's total debt of 55,000 crore will be a partial but significant relief to the national carrier, says civil aviation secretary R.N. Choubey

## Why no one wants to buy Air India **INDIA TODAY**

The national carrier has been facing major difficulties in its bid to divest with no takers for the Maharajah.



Upasana Jain  
New Delhi  
June 4, 2018 . UPDATED: June 4, 2018 17:58 IST



US\$ 7 billion Debt PLUS  
US\$ 7 billion Accumulated losses



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# IPL viewership and reach breaks records

🕒 2 min read News, 29 March 2019

TOPICS SPORTS | INDIA | TV CHANNELS, SERVICES, PROGRAMMES | TV AUDIENCES

The 2019 season of the Indian Premier League (IPL) got underway last weekend and preliminary data suggests that the world's biggest cricket tournament has already set records for viewership and reach.

Broadcaster Star India holds the media rights to the event and said that its 24 channels reached 219 million viewers across the country for the first three matches, [the Economic Times reported](#).

24 channels reached 219 million viewers across the country

live**mint**



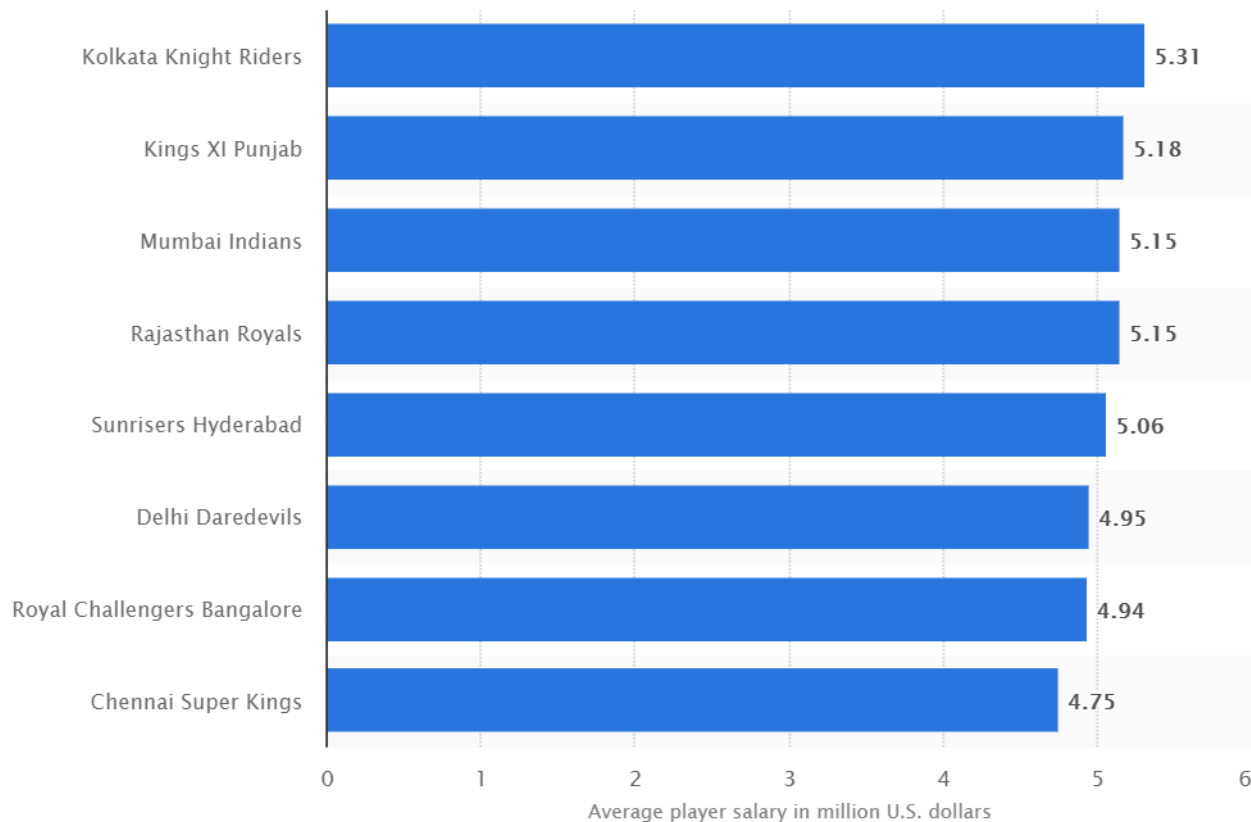
(Photo: AFP)

## India-Pakistan World Cup match garners 60% of the tournament's viewers

The ICC Cricket World Cup match between India and Pakistan earlier this month was seen by 229 million viewers, 60% of the total number of viewers for the overall cricket tournament, according to viewership measurement agency BARC India. It



# IPL Average Annual Player Salary (US\$ M)



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## Indian Elections

900 m voters

European Union, US, Canada, Mexico

6 weeks of polling over seven phases

8,000 candidates

2,000 political parties

543 parliament seats

Campaigning Cost US\$ 10 billion

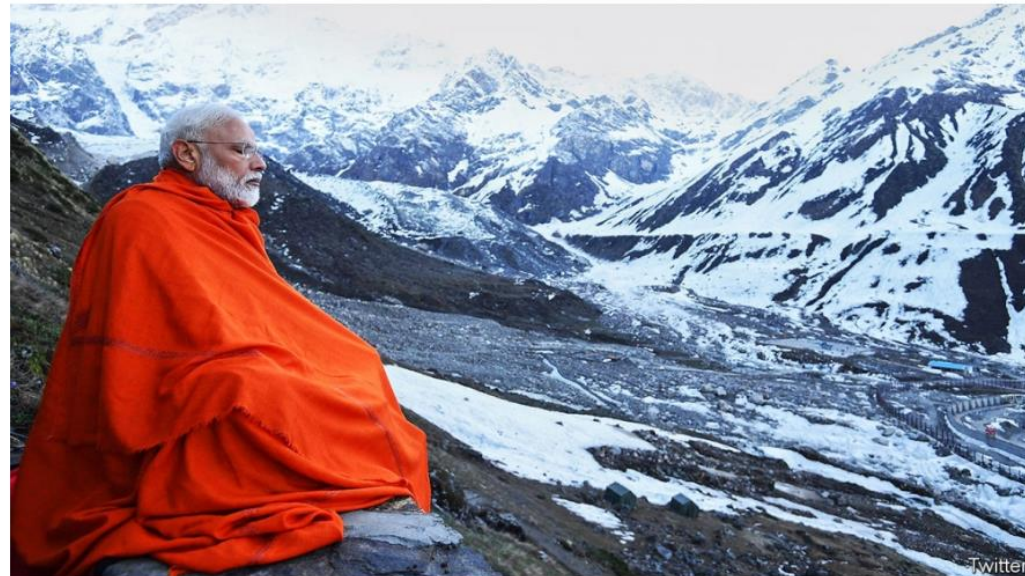
US\$ 500m cash, gold, drugs, alcohol busted

4m portable battery operated polling machines

All votes counted on one day – 23 May 2019

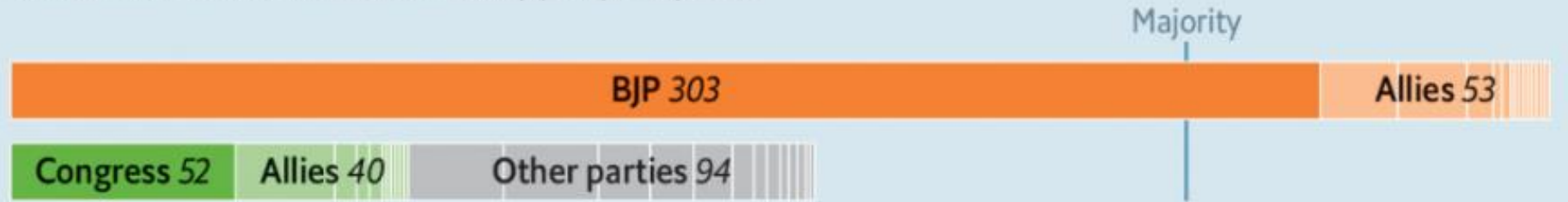
# Narendra Modi scores a remarkable election victory

*The BJP's win is down to the prime minister, not the party*



## Modi's might

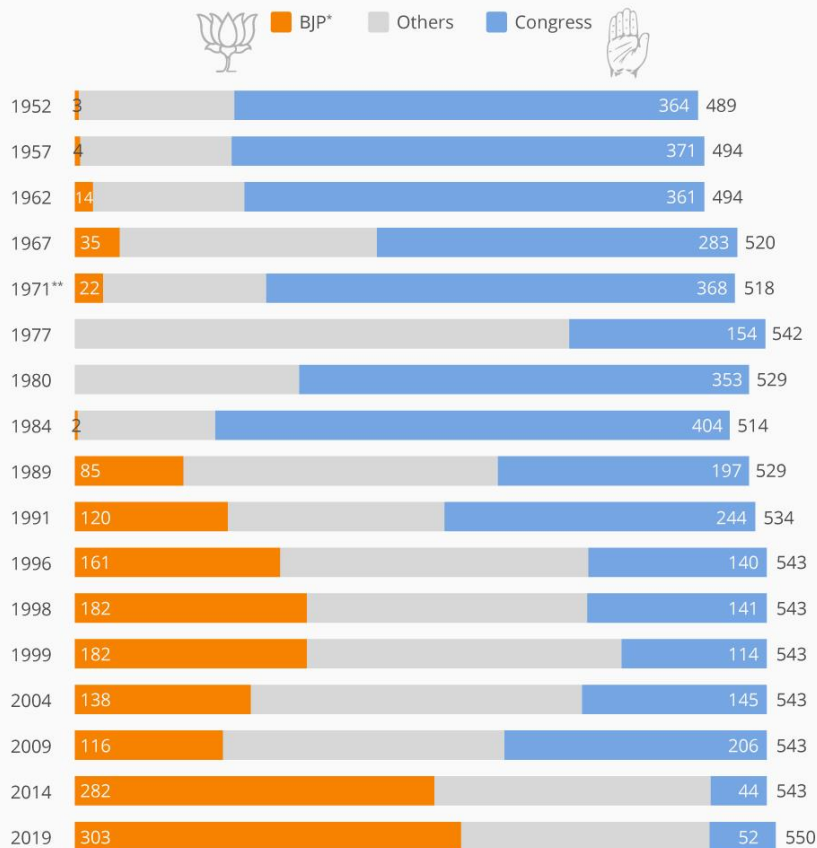
India, seats won in the Lok Sabha, by party, May 2019



Source: Election Commission of India

## From Fringe to Mainstream: The Rise of the BJP

Indian parliament lower house seat distribution by party since independence





Union Home Minister Amit Shah speaks in the Rajya Sabha during the Budget Session of Parliament, in New Delhi, on Monday. (PTI)

## Article 370 scrapped, Jammu & Kashmir to be carved into two Union Territories

3 min read . Updated: 05 Aug 2019, 04:45 PM IST

**Shaswati Das**

- Jammu and Kashmir will now be governed by the laws applicable to other Indian citizens



# The Kashmir crisis isn't about territory. It's about a Hindu victory over Islam.

Prime Minister Narendra Modi used the Muslim-majority state as a demonstration of Hindu power.

## Why Modi's Kashmir coup threatens India's democracy

*Simon Tisdall*



Clumsy intervention by Trump in dispute over Kashmir may have prompted Indian PM to act



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# Crazy Rich Indians

