



Tourism New Zealand Western Markets Roadshow

USA, Canada, UK, Germany

Report

September/October 2023

Destination Queenstown

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1. Overview

The Western Markets International Marketing Alliance* (IMA) Roadshow provided an opportunity for IMAs to engage with a network of high performing travel sellers within the North American, UK and German markets. This event enabled participants to build awareness of NZ regions and better equip the trade to include the Southern Lakes with their new depth of knowledge into their client itineraries, as well as IMAs gaining market intelligence and insights from these key visitor markets.

The Roadshow dates and cities –

New York – morning session (25 September)

Atlanta – morning session (26 September)

Los Angeles – morning session (27 September)

Vancouver – morning session (28 September)

London – evening session (3 October)

Munich – evening session (5 October)

The intention for this roadshow was to execute an interactive training event that inspires and motivates travel advisors to sell higher quality holidays to New Zealand and to recognize the unique characteristics of each of our regions. The main goal, to drive regionality across New Zealand and increase length of stay. TNZ asked IMA's to test moving away from purely product-led trainings and focus on regional storytelling to inspire travel to our respective regions.

In each location, each IMA hosted a small group of agents in a lounge like setting and created a sensory/storytelling experience to incorporate into our regional story. We were allocated 12-15 minutes for each training session based on the number of agents attending each event.

For the experiential learning component, we discussed and agreed as an IMA to feature the following educational pieces that supported our regional storytelling. Lavender hand cream, to encourage our manuhiri (visitors) to slow down in our region, to take their time by experiencing more and engaging more deeply with our community and be richly rewarded by doing so. A honey tasting, reflecting the pioneering spirit of our people, the wellbeing and abundance of produce in our region, and then douglas fir essential oil that shows the nature of good people in our community doing good things that have turned this common pest of a tree into a valuable and sustainable product that funds ongoing conservation, and lastly tree gifting. We shared the sentiment with each attendee our duty of care to protect our unique landscape and regional diversity now and into the future.

The format for each event was a welcome and networking opportunity, before 7 experience sessions with the agents. There was a break mid-event that allowed for additional networking. At the end of the event, Tourism New Zealand run through their tools, talked about the NZ Explore Pass to encourage self-famil and through the support of attending airlines in NAM prize packages were won by event attendees (prize winners listed below). In the UK the prize package was gifts from our regions given there is no Air New Zealand metal in market, only Star Alliance airlines.

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*For members new to the understanding and reference of an International Marketing Alliance (IMA) and what this means. This applies to our work in long-haul markets when we work with Tourism New Zealand. Agents do not perceive the granular level of our regions perimeter and responsibility; therefore, we partner with surrounding Regional Tourism Offices (RTOs) to promote the wider Southern Lakes region. That is with our partners at Lake Wānaka Tourism and Tourism Central Otago.

2. Market Background & Key Insights

USA

The United States is currently New Zealand's second-largest international visitor market. Visitor numbers from the US on are on the rise due to increased air capacity and more direct airline routes. In 2019, average spend from the USA was NZD\$4,707 per person.

Key insights:

- Our target market segments in the US are the Experienced Connectors, Vibrant Adventurers and Fun-Loving Trailblazers.
- Almost half of US holiday visitors choose to visit during New Zealand's summer months, December to March.
- Travellers from the US are the most satisfied with their New Zealand holidays, according to TNZ's Visitor Experience Monitor research. During their visit, two thirds of Americans travelled beyond New Zealand's main tourist centres to the regions.
- Almost three-quarters of US holiday makers visit another country during their trip. US visitors stay around eleven days on average, although some stay for as many as 21 days. Many US holiday makers also visit Australia and the Pacific Islands (Fiji, Tahiti, and Cook Islands).
- 68% of American travellers book their travel through an agent.
- According to TNZ research, US holiday makers are looking for a destination where they can have fun, enjoy themselves, feel happy and relax.
- Older travellers from the US have a greater desire for fun, learning and exploring, feeling safe and welcome, and broadening their minds. By comparison, younger travellers have a stronger desire to feel good about themselves, feel excited, engage in personal challenges, and get an adrenaline rush.
- Approximately half of all US visitors to New Zealand are fully independent travellers who plan and organise their own accommodation, transport, and itinerary. Purchasing land and air travel independently is increasingly prevalent with Online Travel Agencies (OTA's) and airlines aggressively chasing direct business.

Canada

- TNZ's target market segments in Canada are the Experienced Connectors and Vibrant Adventurers.
- The 5.7 million Active Considerers from Canada consider New Zealand for its safety, landscapes, and scenery and fun and enjoyment. 26% of them are in the booking stage of the funnel.
- The inclination to use a travel agent is increasing post pandemic, with 40% of ACs saying they will use a travel agent or other professional planner for their New Zealand vacation.
- According to TNZ research about half of ACs in Canada want to visit New Zealand to learn and explore new things.

United Kingdom

Prior to COVID-19 the United Kingdom was the fourth largest international visitor market. The average spend per visitor was NZD\$5,000, with a lot of it spent in the regions.

Key insights:

- TNZ's target market segments in the UK are the Experienced Connectors and Vibrant Adventurers.
- 75% of all UK visitors into New Zealand booked through a traditional travel agent, about 5% booked via an OTA (online travel agent), and about 20% booked airline direct online.
- Half of British visitors to New Zealand have been to New Zealand at least once before.
- Around three quarters (73.2%) of British travellers ventured outside of the main tourist centres and into the regions.

Germany

Prior to COVID-19 Germany was New Zealand's second largest visitor market in Europe (after the UK) and 6th globally. For many Germans, New Zealand is an aspirational destination for 'their trip of a lifetime'. Because of this, Germans are willing to invest in their trip, spending an average of NZD\$6,300 per person, the highest spend of all our target markets.

Key insights:

- TNZ's target market segments in Germany are the Experienced Connectors and Vibrant Adventurers.
- German visitors are independent travellers and travel to an average of eight regions in New Zealand, making them our most widely travelled market.
- They appreciate New Zealand's mix of natural wonders and cultural attractions and seek an active encounter with the environment and culture.

- The length of stay and average spend per night are both high compared to other markets, increasing the value of the German market to New Zealand's tourism industry.
- 80% of all German visitors into New Zealand book through a traditional travel agent, about 5% book via an online travel agent, and about 15% book direct online.

3. Event Objectives & Benefits

The key objectives/benefits from this roadshow:

- Build strong selling capability of travel sellers.
- Engage with existing network of travel sellers that send high quality visitors to NZ and build on general business relationships.
- Facilitate new business relationships and expand network of engaged travel sellers.
- Increase general destination knowledge of travel sellers and their understanding New Zealand's diversity and unique selling points of each region.
- Promote regional dispersal.

4. Attendance/Attendees

For the North America roadshow events TNZ targeted high quality advisors. "High quality" was defined as both highly engaged with TNZ activities (NZSP Gold or Silver certifications, webinar attendees, etc) and high producers for the South Pacific, according to their conversion partners (consortia, airlines, tour operators, wholesalers and IBOs).

New York – agents from following companies:

The Gil Travel Group, Protravel International, Business World Travel, Grand Holidays, ECI Travel, Travel Edge, Executive Global Tours, Amiko, Cartology Travel, Dream Vacations, Artisans Of Leisure, Downtown, Tzell Travel, Enlightened Journeys Travel, An Affiliate Of Travel Experts, Unique



Weddings And Tours, The Travel Society (dba WanderWild Travel), Signature Travel Network, Travelwithsteve, Aspire Down Under, Boomerang Escapes, FCM Meetings & Events, Riya Travels, Inroads America Inc., Helmsbriscoe, American Guest LLC.

Prize Winners:

Air New Zealand – John Patrick-Cone, Executive Global Tours

Air Canada – Lisa Rossmeissl, Boomerang Escapes

Delta Airlines – Rosa Vega, Helmsbriscoe (Southern Lakes prize)

Qantas – Richard Williams, American Guest LLC

Atlanta – agents from the following companies:

Personal Touch Tours Travel Agency, Cox Enterprises, Sandpiper Travel Company, Etherio, Brownell Travel, The British Connection Inc., Elevations Travel, Frew Travel Services, Xceleration, Blue Pineapple Travel, Over The Moon Vacations, Global Escapes, Amavi Global Destinations, Take Time To Travel, Global Escapes, Ltravel Connection Inc, Protravel, Pilkington Travels, LLC, Travel Experts, a Virtuoso Agency, Q Adventures Travel, Blue Pineapple Travel, Pacific International Travel & Tours, Inc., Protravel International, Global Escapes, Wild Indigo Travel, Travel Leaders Four Seasons.

Prize Winners:

Air New Zealand – Allison Oxford, Protravel

Delta Airlines – Amy Rambo, Blue Pineapple Travel

Los Angeles – agents from the following companies:

Camelback Odyssey Travel-a Direct Travel Company, Australia New Zealand Group Services, Carter Elite Travel, ConsolAir, Inc d/b/a/Riviera Village Travel, All Travel, Protravel, Unveiled Travel, Cwt Meetings & Events, Life:styled Group, The Travel Corporation, The Travel Society, Inspired Compass Journeys, Professional Travel International, True Places Travels (Cadence Independent Affiliate), Angela Veray Travel Agency, LLC, Savitar Tours, The Best Of New Zealand, TravelStore Irvine, Essential Downunder Travel, Inc., Funtastika Travels, Terramar Travel, Scott Dunn, Pacific

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Destination Center, Sellebrity Travels, Travelstore Inc, Planner Hero, Active Downunder, Travelstore, Protravel.

Prize Winners:

Air New Zealand – Derek Fine, The Travel Corporation

Air Canada – Sarah Andreiko-Skidmore, Plaza Travel/Signature Travel (Southern Lakes prize)

Delta Airlines – Yari Cruz, Protravel

Hawaiian Airlines – Cassandra Bookholder, Camelback Odyssey Travel

Vancouver – agents from the following companies:

Expedia Cruises-kitsilano, Downunder Travel Vancouver, Discover Holidays, Freelance Journalist, Travel Best Bets, Forbes Travel International Ltd, Dream Vacation Architect Inc., Tripzter Travel, Discover Holidays, North South Travel, Travel Best Betw, Tripzter Travel Inc., Direct Travel, Downunder Travel Ltd, Smartflyer Atlanta, Roblin Travel, Enchanted Vacations Travel Professionals, Independent Flight Centre, Discover Holidays, Exquisite Travel Group, Downunder Travel.

Prize Winners:

Air New Zealand – Manya Kellou, Forbes Travel International Ltd (Southern Lakes prize)

Air Canada – Erin Kupnik, Travel Edge

Qantas – Natasha Rodriguez, Enchanted Vacations Travel Professionals

London – agents from the following companies:

Trailfinders, Flight Centre, Kuoni JL Chelmsford, Freedom Destinations, Travel Counsellors, Turquoise Holidays, Audley Travel, Discover The World, Original Travel, Prestige World, Quintessentially Travel, Elegant Resorts, Beaver Travel, Kuoni, Inspiring Travel, Enchanting Travels, G Adventures, Inspiring Travel, Dialaflight/lotus Group.

Munich – agents from the following companies:

Pacific Travel House, Fly And Dream, Tmc Reisen, FTI Touristik AG, Australia Tours, Emu Exclusive Travel Gmbh, Explorer Fernreisen, Die Welt Wartet, Reisefluesterer Deluxe, Sta Travel, Kaf Reisen,

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Bestcamper.net Gmbh, Gabi's Traumreisen, Travelenvogue, Reiseträume Indersdorf, Fti Touristik Gmbh, volaTWO, Bestcamper.net Gmbh, RV Touristik GmbH, Bestcamper.net Gmbh, Pacific Travel House, Delphin Tours, Travelesence Deutschland GmbH, Bayerisches Pilgerbüro, Emu Exclusive Travel GmbH, Marco Polo Reisen, Australia Plus Reisen, Fly And Dream, Miller Reisen GmbH, Travelesence, Australia Plus Reisen /Best of Travel Group, Bcd Travel, Tecs Reisen, Coco Weltweit Reisen, Sky Travel Agent GmbH, Fti Touristik GmbH, BBV Touristik GmbHm, Enchanting Travels, Sunshine Tours International, Takeoff Reisen, Reisewelt Darmstadt, Irene' Travel & Text.

5. Insights

The North America market from my perspective has little concept of making environmentally conscious decisions (generalised), though they loved the storytelling component and the feel-good solutions of being able to share with their clients the likes of our gifting platforms of Love Queenstown/Love Wanaka. Consumers in this market set, have little regard for regenerative tourism, it just isn't in the spectrum of their reality on the daily from what community engagement we experienced while in the market around the cities/at airports. My thoughts are that it comes down to a lack of education and awareness. Regenerative travel is a still a relatively new concept for many people. Most travel industry promotions still largely promote traditional holiday and tourism experiences, that until we see a conscious shift will still largely overshadow regenerative travel options.

The flip side of this could be felt in the UK and even more so with the German market. Again, coming down to thoughts on education and awareness here, I feel this is because they place a high value on nature and outdoor activities. This therefore seems to blend more seamlessly into their interest and need for inclusion of these experiences into their client itineraries. Based on their cultural values and appreciation of the outdoors and seeking to find regenerative travel options because this aligns with their way of life. For the UK market there was lots of marketing around the city of being a net zero

carbon city by 2030, I saw marketing on the tube for measures that included expanding public transportation and the promotion of cycling and walking and clean energy solutions.

This is of course an evolving situation, and my perception overall from the cities visited in respect of their awareness to regenerative tourism. We must continue to tell the story of regenerative travel that supports our industry, creates awareness, and most importantly supports our operators and partners on that journey toward growing more sustainable and regenerative travel options for their clients.

6. Summary

The format for this event differed vastly from previous roadshows with the storytelling/activation aspect as the hero, away from the usual product lead training. The feedback proved favourable among the agents present as very well received, some commented it was the best they have been too. Formal consolidated feedback will be shared from TNZ when ready, and I will be interested to know if that initial feedback transfers to the overall feedback from this event delivery and training style.

From an immersive perspective this was a great opportunity to try something new and that helped identify our regional diversity for NZ overall, it was also well aligned with us sharing where we are at on our journey with our Destination Management Plan. In saying this, there were a few sticky points. I found it hard to ascertain the depth of knowledge and experience agents had in selling NZ, and the Southern Lakes region beyond asking the simple question during the training session, which also due to the time constraints had limitations from further understanding the depth of that knowledge on product with only (12-15 mins). Consequently, and a fundamental piece of feedback I have provided Tourism New Zealand is the need to leverage this knowledge prior by receiving and understanding the agent's profiles – volume they sell, demographic they market too, average length of stay, usual itinerary inclusions, and their comfort level for selling NZ, especially if they have not been here

previously. I believe that this format worked very well for agents with little understanding of NZ and the Southern Lakes region.

For the product managers in attendance where we have an established relationship or were new to connect, it took the break sessions over breakfast/morning tea to have a more relevant update provided, even then we were short on time to do this, as with any event and the volume of people to network with. Of course, we have the strength of sharing our updates through the usual means (emails/newsletter/other industry events - TRENZ etc) and can conduct in-depth follow up, I do feel this format did not deliver the best result for them, though their initial feedback was complementary when asked. They did appreciate our visit to market and wanted to support TNZ with the opportunity presented. Not all product managers who had a depth of knowledge were grouped together either, so it did make it difficult to tailor the session appropriately when they were in some instances with agents who hadn't been to NZ before.

The first week in North America was also very intense in the schedule, checking-out of accommodation, heading to the event location, facilitating the training session, and then transferring to the airport for flight to the next location, only to repeat 4-days back-to-back. I would have liked to see TNZ take the opportunity to slow down the training and have considered a couple of additional stops with new hub connectivity that would then have allowed us to further explore untapped potential for agents looking to or currently selling New Zealand for which this training style would have been very beneficial.

Looking at attendance numbers overall, I felt these were soft in New York but grew stronger for each other location visited in North America. The largest event attendance for each event delivery was from the UK/Europe market, and the biggest wash from events was in Vancouver, followed by London location. TNZ have shared the database of confirmed attendees and cancellations, so we can offer a very comprehensive and tailored email to both audiences which is of great value.

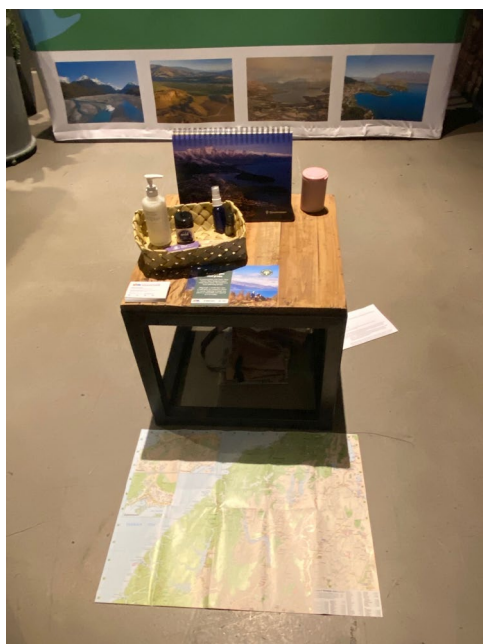


I do believe training opportunities such as this complement the efforts of Tourism New Zealand's other in-market initiatives, their specialist program and further trade engagement including Kiwi Link events (where operators are also involved) is worthwhile, however, I believe a biennial rotation for this style of event would suffice, and should be targeted to sellers not the teams who look after product, unless they can consider a split in the event delivery to support both parties attending.

In parting, follow-up will be delivered through each respective RTO so that both Lake Wanaka Tourism and Tourism Central Otago can both establish relationships with the attendees. If reading the report you have any questions, please contact me, lindam@queenstownNZ.nz or phone 027 264 7533.

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7. Related Content/Event Images



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