



<b>Southern Lakes Report</b>	
Name of Tradeshow/Event	UK & Germany Frontline Training Roadshow 2019
Dates and Locations of Tradeshow	<ul style="list-style-type: none"> <li>• Munich 18 March</li> <li>• Dusseldorf 19 March</li> <li>• Manchester 20 March</li> <li>• London 21 March</li> </ul>
Southern Lakes Attendee/s	Sarah McDonald
<b>Background</b>	
Market background, size, trends	<p>The United Kingdom is our fourth largest international tourist market. There is still a strong demand for NZ but this is softening off. The reality of Brexit is now forefront on peoples mind along with the uncertainty of what the future holds.</p> <p>International Arrivals: Year End (Jan 2019 )Total – 236k, Year End (Holiday) – 103k          These are down on last year but the Lions Tour did affect the numbers last year. Without the Lions Tour stats visitor numbers are up 4%.</p> <p>Germany is New Zealand’s second-largest visitor market in Europe. The key market is independent professionals, which are willing to spend money on their holidays. They are likely to make travel arrangements while they are travelling around NZ. Germans spend a lot of time researching NZ before booking with travel agents. Germans continues to be the strongest market out of Europe for visitor numbers.</p> <p>The market has softened especially in the backpacker market.</p>
Tradeshow format, number of days, number of appointments, frontline or wholesale?	<p><b>All evening events</b>          12 minute appointments with Frontline Staff and some Product Managers – 8 to 10 people at the table at a time. Food served during the breaks. Cocktail function immediately after for an hour or so.</p> <p>London Premium Training          9 appointments with premium agents. This was Friday morning after the Roadshow. Only 9 IMA’s attended this training.</p>
Number of NZ attendees	<p><b>11</b> (some IMAs had 2 people)          IMAs – Thermal Explorer Highway, Pure Southern Land, Nelson and Marlborough, Canterbury and West Coast, Pacific Coast Highway, Wellington and Wairarapa, Auckland and Northland, Southern Lakes,          PLUS: Air New Zealand &amp; Singapore Airlines</p>
Number of local attendees	<p>Munich – 63          Dusseldorf – 45          Manchester – 51 (not including the 10 on the day cancellations)          London – 52 (not including the 14 on the day cancellations)</p>

	London premium group - 9
<b>Southern Lakes Objectives</b>	
Why are we attending? What are we planning to achieve?	<ul style="list-style-type: none"> <li>• Promote shoulder season travel</li> <li>• Increase awareness of Southern Lakes and its 3 regions to Frontline agents</li> <li>• Update market on new product</li> <li>• Maintain and build on existing relationships with key trade agents</li> </ul> <p><b>Convey key messages:</b>  Four seasons region – promote Spring and Autumn  4 + nights in region  Ski season  Everything is close by in the region  Adventure, wine, nature, scenery</p>
<b>Outcomes</b>	
Were the objectives met?	Yes - this was a great event, very well organised. As it was frontline there was quite a mix of knowledge, it was reassuring to be introducing the region to many different agents. Great relationships were built and there were a lot of questions with people trying to find out as much information about the region as possible. With having a good amount of agents new to the area I feel they now have a really good grasp on the 3 regions and how they work together for their clients.
Local attendee knowledge	There was a good mix of knowledge with the attendees. Dusseldorf and Manchester seemed to have less knowledge with some of the groups while others were quite knowledgeable. London was great with smaller groups, which meant the time could be spent answering more in-depth questions while presenting whether it was for people new to the area or knew a lot of information. Munich as always was a good mixture but more people knew the region so wanted more in-depth information/updates.
Well attended or not?	All events had good attendees. There were some no shows as noted above. The groups sizes were great to be able to make sure everyone got the information they needed from the presentation.
<b>Opportunities and Feedback</b>	
What have we learnt about the market?	<p>UK visitors to NZ are still an important market to be encouraging. The average number of days to NZ have remained steady at 25 days with an average spend of \$4,168. The spend has softened but they are still 2<sup>nd</sup> out of the top 6 markets.</p> <p>Due to Brexit there is a period of uncertainty happening. There is the political uncertainty along with a lack of consumer confidence. A lot of consumers have a wait and see mentality. This is reflecting the decision making of not only holidays but big financial purchases (cars, houses etc). NZ was quite resilient to this until January 2019, but now is showing a 15% decrease in bookings. The operators are reporting a softening in bookings which will reflect here in the next year or so. Brexit has also changed the way consumers are booking. There is a shortening of booking leads in 2 months. Although there is a huge amount of uncertainty going on TNZ are saying not to panic and to watch what happens.</p> <p>Word of mouth continues to be the key driver of market visits/motivator. NZ still meets the expectations of visitors with 97% of expectations of NZ experiences met or exceeded.</p>

	<p>Both UK and Germany continue to have the best regional dispersal with UK visitors visiting 5 – 6 regions and Germans visiting around 8 regions per visit.</p> <p>For the UK the knowledge gaps include:</p> <ul style="list-style-type: none"> <li>- The length of time to fly, how easy it is to travel around and the time it takes to get around.</li> <li>- Landscapes and scenery, range of adventure and NZ being clean and unpolluted continue to be reasons for visitors coming here.</li> </ul> <p>The flight times are often the biggest barrier for Germans coming to NZ as well as the range of experiences and the time it takes to get around. Again landscapes and nature are one of the best motivators.</p> <p>Germany continues to be a huge market for us. They have the longest length of stay 4weeks + and the average spend is around \$6,000. The active considerers in the Southern/Central regions of Germany are willing to spend the most.</p> <p>The backpacker market is softening which will affect the returning traveler stats from Germany. The most value visitors are the 30 – 55 age bracket which is who TNZ are planning to target.</p> <p>85% of Germans continue to use travel agents to book their holidays so this continues to be an important avenue for attracting visitors to NZ.</p> <p>TNZ talking and working with German agents more than ever before. They are doing this through product introductions, training on how to sell NZ and promoting NZ to their clients. Talking to agents at both German and UK events they said when it comes to the TNZ updates they always try to make it as they find them really valuable and TNZ does a good job of getting the information across compared to other destinations.</p>
<p>Growth segments</p>	<p>The markets are showing a softening. TNZ is aware of this and working on how to change it. Until Brexit is sorted or a decision is made there will be an uncertainty on booking holidays.</p> <p>NZ continues to be on the bucket list for many consumers but they are cautious of booking.</p> <p>TNZ are focusing on the independent professional market.</p>
<p>Popular products</p>	<p>Again, accommodation was important to the agents with lots of questions around that in all 3 regions. There was a range of questions and information given for all the regions.</p> <p>Milford and Doubtful Sounds was popular but more with agents asking, what the best sound was to go to rather than sending everyone to Milford.</p>
<p><b>Conclusion</b></p>	
<p>Summary</p>	<p>I think it is important for us to still be active in the UK &amp; Germany. With the softening of both markets I think it is important for us to continue to work with TNZ in promoting NZ. Any Frontline training on offer or famils should be something we are planning to be part of especially as this is how consumers are still booking. Brexit is a worry but until we know what decisions have been made we need to ride the wave of uncertainty.</p> <p>Air New Zealand is definitely pushing the flights to New Zealand with having one stopover and their partnership with Singapore airlines.</p>

What follow-up was completed?	<ul style="list-style-type: none"><li>• A spreadsheet of all attendees' contact details distributed to Wanaka and Queenstown.</li><li>• Generic thank you email to all contacts on behalf of SLT including a link to information on the 3 regions via the SLT dropbox.</li><li>• At the time all people I met received a SLT A4 info sheet.</li><li>• Specific emails and questions answered from training nights and email follow up</li></ul>