

Destination Queenstown

Queenstown Connect

North America insights, May 2019



*feel the
inspiration*

North America YE Feb 19

Arrivals USA

YE FEB 19

Total NZ	354,693	+5%
Holiday NZ	237,293	+6.9%

Total Queenstown 121,428

Arrivals Canada

YE FEB 19

Total	71,262	+2.4%
Holiday	40698	-0.6%

Total Queenstown 68,209

Stay Days USA

YE Dec 18

Total	5.1M	+1.2%
Holiday	2.8M	+5%

Stay Days Canada

YE Dec 18

Total	1.47M	-6.6%
Holiday	777K	-5%

US seasonal arrivals

New Zealand Seasonal Arrivals
YE March 19



ARRIVE IN
SUMMER
41%



ARRIVE IN
AUTUMN
25%

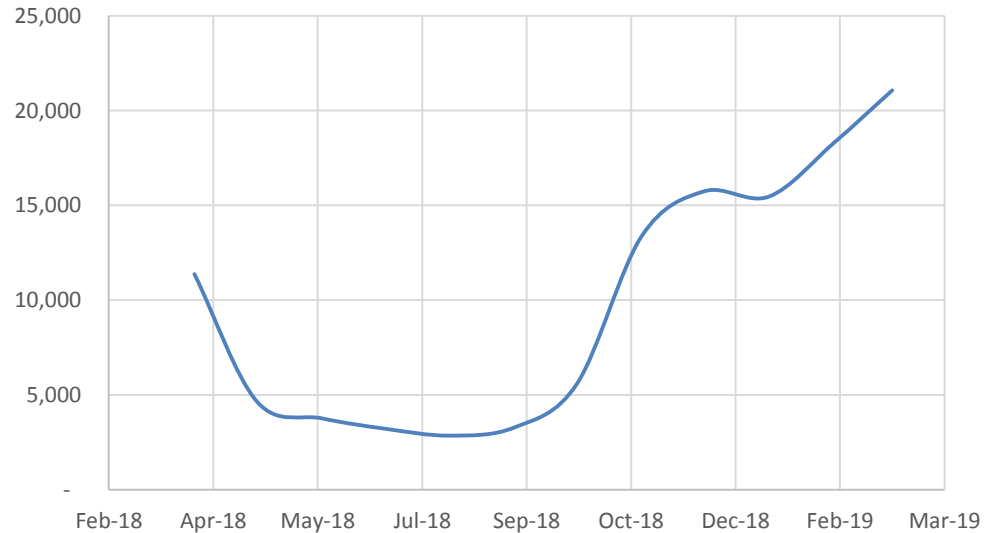


ARRIVE IN
WINTER
11%



ARRIVE IN
SPRING
23%

Queenstown Seasonal Arrivals
YE March 19



Air Connectivity

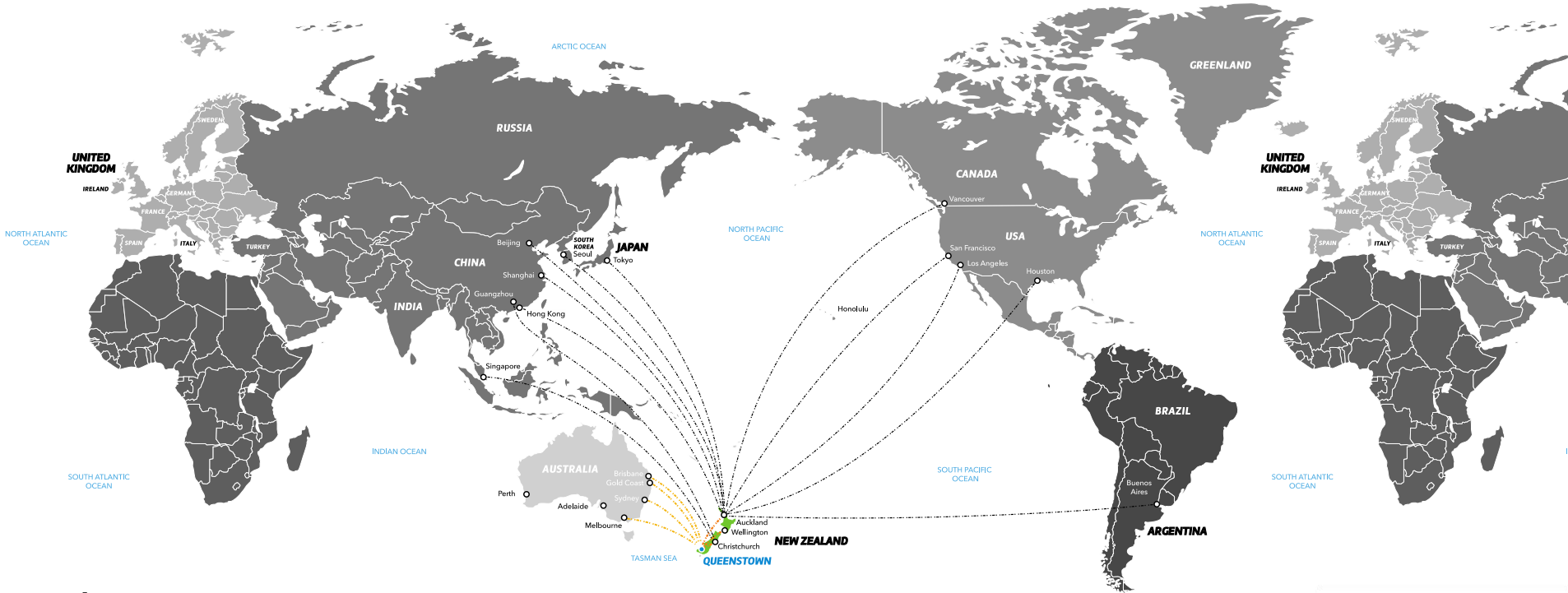
Current

- Non-Stop Vancouver, San Francisco, Los Angeles, Houston, Chicago, Honolulu
- United Airlines returns to year round service
- Increased frequencies on Hawaiian Airlines

Future

- American Airlines and Qantas have applied for anti trust
- American Airline: Los Angeles – Christchurch set for 20/21
- Air NZ: commencing 5 day departure Chicago – Auckland service (Dec 2019)
- Air Canada Vancouver – Auckland service (Dec 2019)

Air New Zealand update



APPROXIMATE
FLIGHT TIMES TO
QUEENSTOWN

3
HRS

AUSTRALIA

12
HRS

ASIA

13
HRS

USA

13
HRS

SOUTH AMERICA

23
HRS

AFRICA

25
HRS

EUROPE



Travel Trade Update

- DQ in market trip
- Strong knowledge
- Trending destinations: East Africa, Europe & Australia
- Australia: In market activity

DQ activity for FY19/20

QCB

- IMEX Las Vegas – September 2019
- Prevue Summit Chicago – October, 2019
- Incentive activation with Auckland Convention Bureau – Oct-Dec, 2019

Trade

- Trade US mission – TBC
- Kia Ora South – July, 2019

Consumer Trends



Young Blood

Generation Z



They have power

- Up to US\$143 billion in **buying power**
- **Largest generation** by 2020
- Taking almost **as many trips** as Millennials every year
- **Staying longer** than Millennials
- **Spending more** on experiences
- Travel decision based on:
 - Activities available
 - **Once in a lifetime** experiences
 - Cultural experience
- Motivation: special events, hobbies and partying with friends (e.g. bachelor and girls trips)

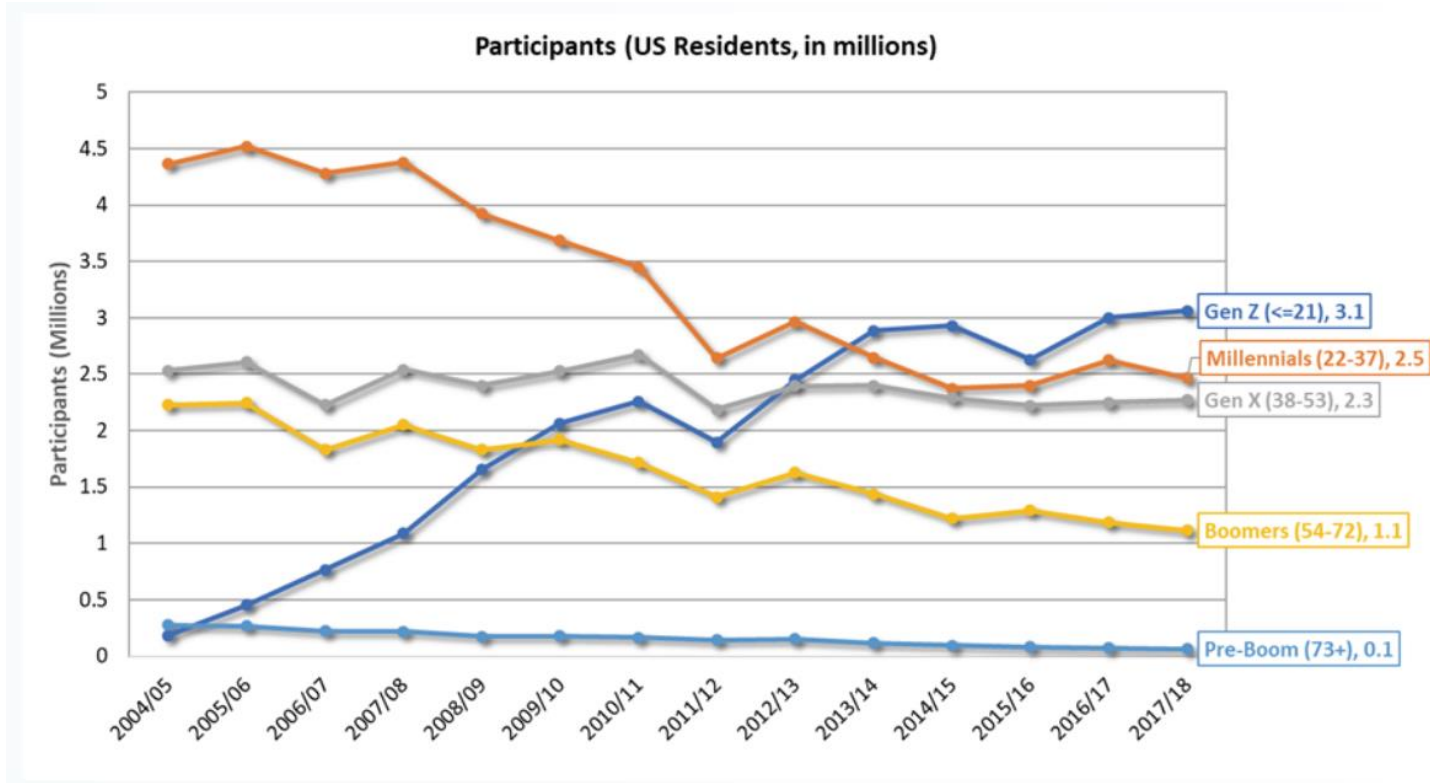
Generation Z



They have different needs

- First true **digital natives**
- More than 50% is active on social media
- Even more influenced by social media (87% vs 77%)
- Constantly **connected** and **tech-savvy**
- Over 7 hours per day **socializing** with friends and family
- Socially and environmentally **conscious**
- **Short attention span**, requires constant updates and stimulation
- Grew up during GFC and tend to be **more careful with expenses**
- Over index the importance of experiences and imagery
- Use mobile in inspiration (68%) and in-trip (79%) stages

Generation Z – US Skiers



A woman is shown in silhouette against a bright, hazy background. She has her arms raised and her mouth open in a shout or cheer. Her hair is pulled back into a ponytail. The overall mood is one of joy and celebration.

THE SKI WEEK IS A MINDSET



Togetherness Rules



feel the
inspiration

Togetherness Rules



A close-up shot from inside a car, showing a person's hands holding a smartphone. The phone's screen displays a map or navigation application. The background is a bright, sunlit landscape with rolling hills and a clear sky, viewed through the car's window. The text "Total Convenience" is overlaid in the center of the image.

Total Convenience

The logo for Queenstown New Zealand, featuring a stylized mountain range with colorful peaks in red, orange, yellow, green, and blue.

Queenstown
NEW ZEALAND

feel the
inspiration

Total Convenience



Experiences should evolve to suit travellers

- Content relevancy
- Simpler pricing models
 - Switzerland all inclusive ski package
 - Epic and Ikon passes
- Service levels
 - Door to door ski transport
 - Mountain equipment drop off
- Use of technology
 - QR Code self guided tours
 - VR, AR and Gamification
- Radicals
 - Who are the innovators who inspire and reinvigorate our industries?

Q&A

Robust economy

Fears of recession in America have faded

But stubbornly low inflation means the Fed cannot relax



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INVESTORS STARTED the year brooding about the risk of an American recession. Torsten Slok of Deutsche Bank, Germany's biggest lender, says clients around the globe were worried. Financial indicators were

At the end of the year a model from economists at JPMorgan Chase had put the chances of a recession within 12 months, based on the S&P 500 index and corporate-credit spreads, at 65%.

But the mood has now improved. By April 29th JPMorgan's model was putting the chances of a recession at just 15%.