International Market Briefings Cairns

12 November 2018

Queensland
AUSTRALIA

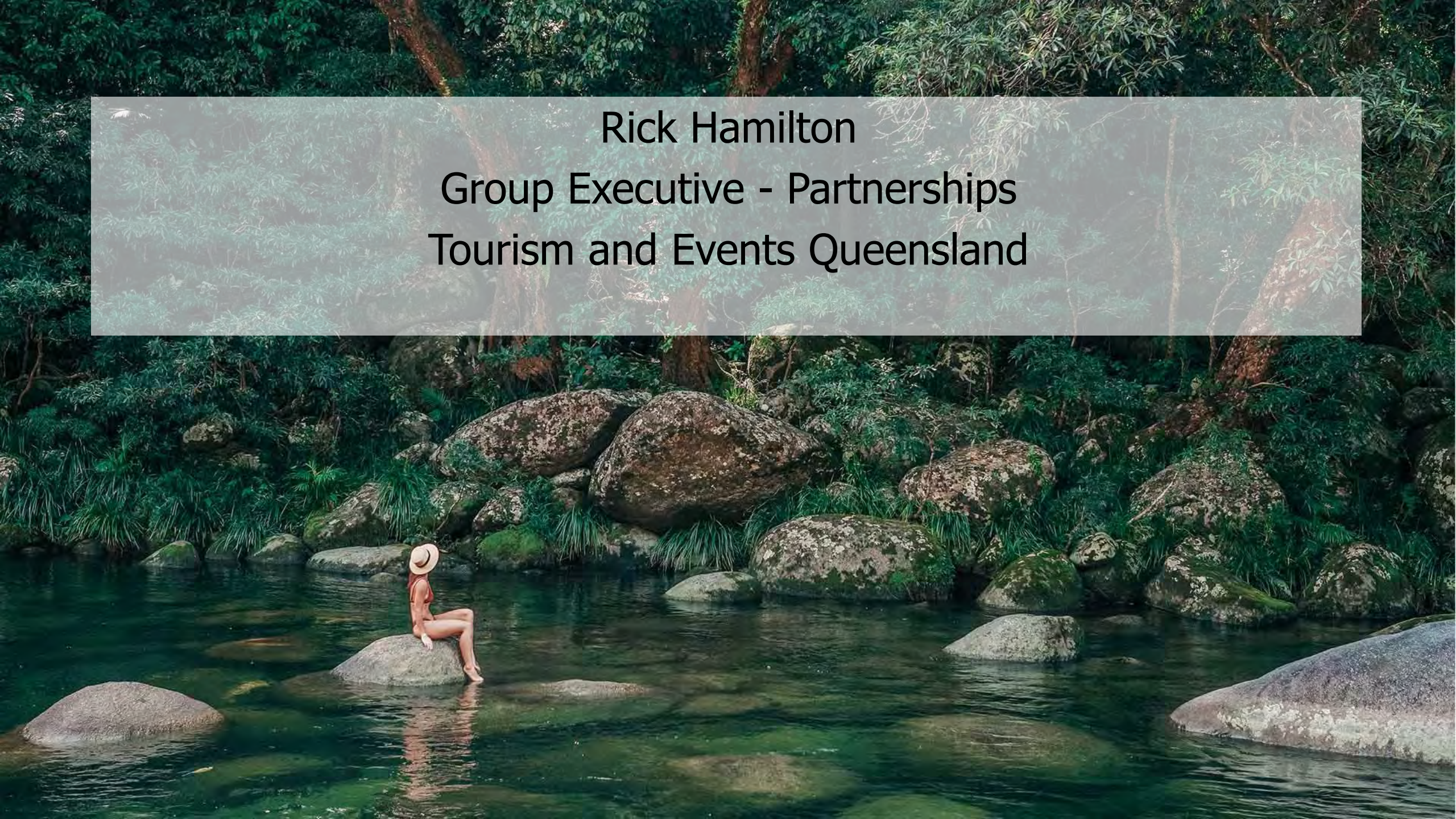
Welcome

Michael Sommer

Western Markets Leader, Tourism and Events Queensland

Order of the day

Timing	Market/s	Presenter
9.15am – 10.20am	Greater China Korea Japan South East Asia India	Charley Shen Michelle Kyung Katie Mills Khim Lim Ryna Sequeria
10.20am – 10.50am	Morning tea	
10.50am – 12.00pm	Americas Continental Europe United Kingdom New Zealand	Leigh Arredondo Kai Ostermann Michael Sommer Mandy Veale
12.00pm – 1.00pm	Networking lunch	



Rick Hamilton

Group Executive - Partnerships

Tourism and Events Queensland

Pip Close

Chief Executive Officer

Tourism Tropical North Queensland

Greater China

(China, Hong Kong and Taiwan)

Charley Shen

International Director

Greater China Market Update

Trade dispute between China and US

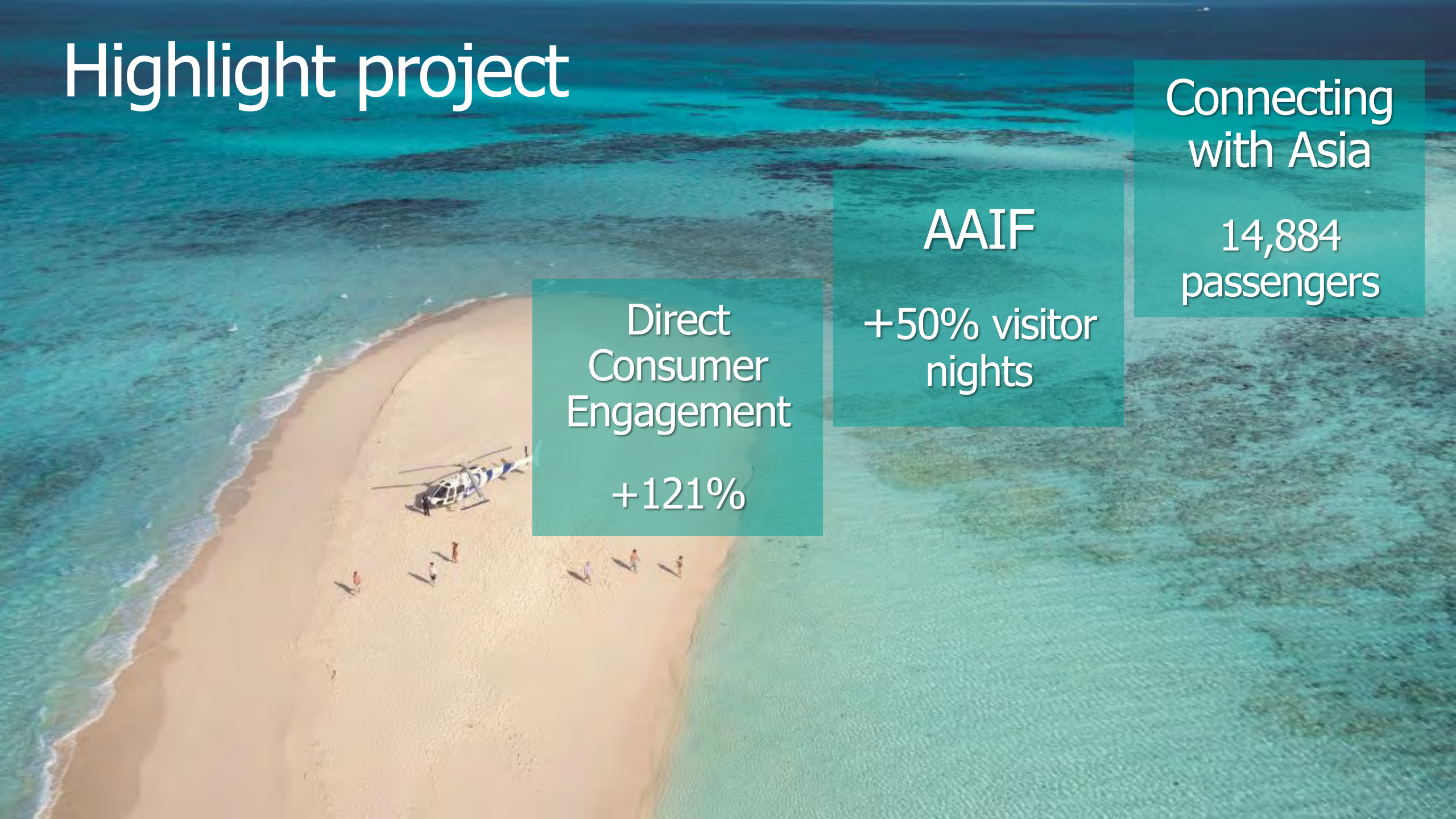
Political tie between China and Australia

Presidential election in Taiwan

Greater China to Queensland

Country	Total Visitors	Annual % Change	3yr trend	Total Expenditure	Annual % Change	3yr trend
China	514,000	9.3%	12.0%	$1,315.2m	30.1%	16.6%
Hong Kong	73,000	16.1%	12.6%	$207.5m	25.8%	10.0%
Taiwan	78,000	2.0%	12.1%	$205.5m	-15.3%	7.0%

Highlight project



Direct Consumer Engagement

+121%

AAIF

+50% visitor nights

Connecting with Asia

14,884 passengers

2018-19 Focus

High Value Travellers (HVT)	AAIF Airline CWA Airlines QKDP FOQ	October 2018 – June 2019
*12,000 passengers	+13% OVE	AUD50m Publicity Value

Strategic Priorities – Aviation

- Promote access to Queensland from China
- Maintain current air capacity from Hong Kong
- Leverage existing air capacity from Taiwan

Strategic Priorities – Trade

- Optimise Queensland Key Distribution Partner Matrix
- Focus on OTA and new platforms
- Focus on Queensland ALoS in non direct air access market
- Explore opportunities with premium travel trade

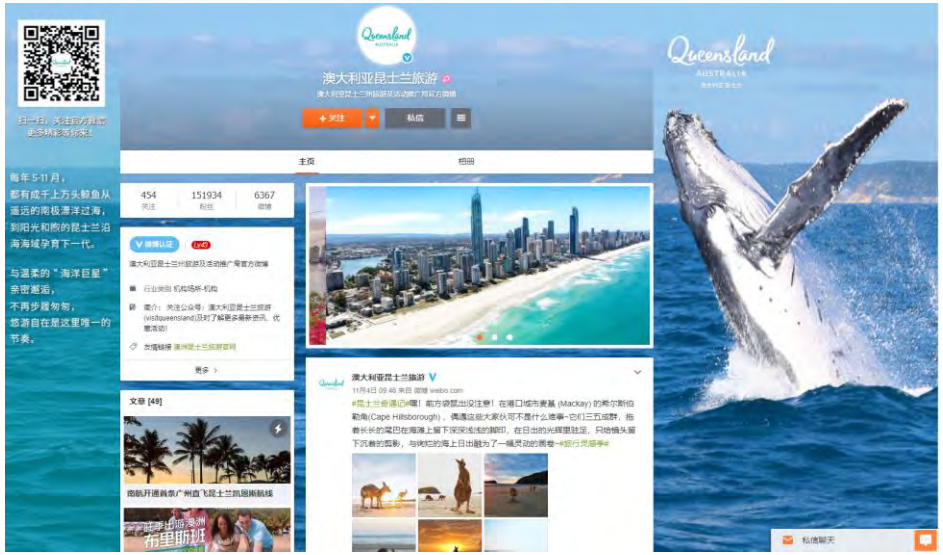
Ctrip

永安旅遊 WING ON TRAVEL

雄獅旅遊 LION TRAVEL

Strategic Priorities – Consumer

- Digital and social media lead
- ‘Mid-haul’, ‘year-round destination’
- Influencers and Broadcasting
- Third party partnerships



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Engaging with the Market

- Queensland on Tour (QoT) Greater China 2019
  - Dates: 5 - 8 March 2019
- Trade famil and Media famil
- Pre QoT workshop in Beijing
- WeChat City Experience

China Payment Expo

Unlocking the Chinese Payment Potential

Date: Tuesday 4 December 2018
Time: 10.00am – 12.30pm
Venue: Hilton Cairns
RSVP: TEQ Industry Calendar

Deep dive into **Chinese Payment Ecosystem**

How to become **Payment Ready**

Meet with leading **payment providers**

Practical tips for **effective marketing** on platforms

Optimise spend of **Independent Travellers**

Be the Australian **Leader**

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Key contacts

China, Hong Kong and Taiwan

International Director | China, Hong Kong and Taiwan

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Market Development Director | Connecting with Asia

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Senior Marketing Manager | China

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Marketing Manager | Hong Kong

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Marketing Manager | Taiwan

- Kimberly Chien | kimberly.chien@queensland.com

Korea

Michelle Kyung

Marketing Manager

Korea Market Update

- Economy grew +2.9% in 2018
- Growth of expenditure
  - Rising asset prices, increased transfer payments and job policies
  - 2019 is projected to slow
- The value of the Korean won
  - Increase by +4% in 2018 and by an additional +1% in 2019
- Consumer Trend
- Mass and Prestige
  - Value based consumption

Korea to Queensland

Country	Total Visitors	% Change	3yr trend	Total Expenditure	% Change	3yr trend
Korea	73,000	-2.2%	10.3%	$250.1m	10.2%	17.5%

Highlight project

Trade campaign

Consumer Travel Show

Airline partnership

2018-19 Focus

High Value Travellers (HVT)	Hana Tours	November 2018 – February 2019
Grow OVE +10%	Grow room nights +10%	AUD10 million PR target

Strategic Priorities – Aviation

- One-stop airline trade partnership activity with Singapore Airlines and Hana Tour
- Strengthen relationships with airline partners (Qantas and Cathay Pacific) through OTA's such as Naeil Tour and Segero

Strategic Priorities – Trade

- Continue to build destination awareness and develop Queensland itineraries with key trade partners
- Deliver trade campaign at Mode Tour Travel Show

Strategic Priorities – Consumer

- Work with key media partners
  - Destination advertising at Korean version Taboola to convert into sales
  - Working with Best seller, "Enjoy Australia 100 times" tour guidebook
- Target consumers through digital and social channels
  - Queensland Facebook in Korea
  - Distribute destination and product information through key trade partners' social media and ASP eNewletters

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Engaging with the Market

- Pre ATE
  - Trade famil with 10 decision makers from key partners
  - Partners: Singapore Airlines and Tourism Australia
- Trade tactical campaign
  - Partners: Hana Tour and Tourism Australia
  - Period: February 2019
- Hana Tour Travel Show
  - Dates: 7 - 9 June 2019
  - Target no. of visitors 100,000 pax

Key contacts

Korea (in-market)

Marketing Manager

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Brisbane team

Director – Eastern Markets

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Manager – Eastern Markets

- Emma Hanson | emma.hanson@queensland.com

Advisor – Eastern Markets

- Sarah Ratcliffe | sarah.ratcliffe@queensland.com

Japan

Paul Summers | International Director

Katie Mills | Director, Eastern Markets

Japan Market Update

- GDP per capita USD39,000 highest ever
- Unemployment +2.2%, lowest level in 30 years
- YTD September total Japanese departures 14m (+4.4%)
- Low Cost Carrier expansion – Asia and Hawaii fueling growth

Japan to Queensland

Country	Total Visitors	% Change	3yr trend	Total Expenditure	% Change	3yr trend
Japan	204,000	0.6%	9.3%	$374.5m	-13.0%	6.1%

Highlight project

Online advertorial, 12 July – 12 October 2018

80% of bookings for Cairns experiences

Over 10,000 competition entries

2018-19 Focus

High Value Travellers (HVT)	JTB HIS KNT NTA	October 2018 – June 2019 & January – June 2019
Increase Holiday ALoS by 1 night	Grow OVE by +9.7%	26,460 pax +26% vs LY

Strategic Priorities – Aviation

- Jetstar Osaka – Cairns service consolidation is main priority
- Qantas MOU
- Education focus
  - Partners: Singapore Airlines
  - Activity: Seminars, Famils
- Continue to support TTNQ in lobbying of Japanese carriers
- Watching brief on new Haneda slots from 2020

Strategic Priorities – Trade

- JTB Global Destination Campaign
- KNT Ponta Promotion
- HIS activity for Cairns is largely backed by TTNQ's own funding
- Cairns campaign with ST World
- In Osaka, supporting Cairns sales by Hankyu and NTA
- JTB Kyushu
- OTA campaign
  - Partner: Adventure
  - App audience: 4m active users

Strategic Priorities – Consumer

- Whole of State PR target of AUD15million
- 40-50% of total Cairns and GBR-related content
- IMHP x2
  - Activity: TV specials featuring Cairns
  - Partners: Tabi Salada and Nijiiro Jean
- Online, support TTNQ's new communication platforms
- Focus on online presence
  - Partner: Veltra
- Press Tours
  - Timing: April – June 2019

Engaging with the Market

- Queensland on Tour 2018
  - Dates: 12 - 14 September 2018
  - 28 operators in attendance
- Queensland on Tour 2019
  - Dates: September 2019 TBC
- TA Walkabout Japan
  - Dates: 25 - 27 February 2019
- Airline famils with Jetstar
  - Period: April - June 2019
- Participate in Education Travel feature in Wing Travel

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Key contacts

Japan

International Director | Japan

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Marketing Manager

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Marketing Executive

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Digital Marketing Co-ordinator

- Mariko Nishimura | mariko.nishimura@queensland.com

South East Asia

Lim Mui Khim

International Director

South East Asia Market Update

Singapore

- Strong SGD (+8% against AUD)
- Competition: Europe, Japan; Cruises
- Direct bookings
- Extensive coverage on bleaching

Malaysia

- Strong Ringgit (+12.5% against AUD)
- Surge in consumer confidence post election (+23% Q2 2018)
- Malaysia Airlines BNE/KUL flight x4 weekly; AAX KUL-OOL daily

Indonesia

- Since YE2018 arrivals consistently crossed 200,000
- US-China trade war - Weak Rupiah
- Indonesian election: April 2019

South East Asia to Queensland

Country	Total Visitors	% Change	3yr trend	Total Expenditure	% Change	3yr trend
Singapore	64,000	7.0%	3.5%	$157.6m	29.1%	3.9%
Malaysia	47,000	2.4%	0.7%	$110.1m	-2.0%	11.8%
Indonesia	23,000	-7.1%	11.8%	$44.7m	-18.5%	20.1%

Highlight project

Singapore Airlines MOU Campaign

Qantas MOU Campaign

Influencer Famil

Qantas MOU Campaign

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2018-19 Focus

High Value Travellers (HVT)

Brand partnership Roll-out

October 2018 – April 2019

Increase Holiday Alos by 1 night

Regional Dispersal

Refresh QLD

Increase visitation and expenditure

PR Value A$2m

KOLs & social content & engagement

Strategic Priorities – Aviation

Singapore

- Singapore Airlines and SilkAir
- Scoot

Malaysia

- Malaysia Airlines
- Air Asia X

Indonesia

- Singapore Airlines and SilkAir

Strategic Priorities – Trade

- 3-4 trade partners per market
- Align KDP co-op campaigns with key airline partnership campaigns eg. Campaign timings, itinerary enhancement
- Leverage on Tourism Australia's "UnDiscover Australia" with KDPs
- ASP training & updates; famils

Strategic Priorities – Consumer

- Media trips in partnership with key airlines
- Content partnership with OTAs, KOLs and Airlines
- Tourism Australia "UnDiscover Australia" via broadcast, influencers etc
- PR value A$2m (media visits)
- Social engagement – KOL content

Engaging with the Market

- Consumer Shows – value add offers
- MICE Trade Famil
  - Market: Malaysia
  - Timing: March 2019 TBC
- Walkabout South East Asia
  - Timing: September 2019 TBC
- Famils
  - Broadcast, media and influencer

Key contacts

South East Asia

International Director | South and South East Asia

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Regional Marketing Manager South East Asia

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Asst Marketing / Admin South East Asia

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Marketing Manager Indonesia

- Wendy Kosasih | wendy.kosasih@queensland.com

India

Ryna Sequeira

Country Manager

India Market Update

- Fastest growing major economy in the world
- 10-12% outbound travel growth despite fluctuating Rupee
- Financial reforms – Demonitisation and GST
- Outbound travel market grew by 9.5% over the last year to 23.94m
- Travel trends:
  - Shorter and more frequent holidays; change in Online Booking trends
- Growth Contributors:
  - High Consumption
  - Young Population
  - Growing affluent middle class

India to Queensland

Country	Total Visitors	% Change	3yr trend	Total Expenditure	% Change	3yr trend
India	78,000	17.1%	15.4%	$149.7m	16.5%	2.9%

Highlight project

Yatra.com

SilkAir and Singapore Airlines Campaign

Veena World

2018-19 Focus

High Value Travellers (HVT)	TA SQ Group, Scoot, MH KDPs	November 2018 – June 2019
5,000+ pax	5m+ Digital Engagement	AUD1.2m Publicity Value

Strategic Priorities – Aviation

- Partner with airlines with one-stop connectivity to Queensland and strong connections across target Indian cities
  - Singapore Airlines
  - SilkAir
  - Malaysia Airlines
  - Scoot
- Engage with carriers with future potential for direct services to Queensland

Strategic Priorities – Trade

- Increase visitation by driving conversion through tactical and destination awareness driven campaigns by:
  - Introducing new destinations and experiences through product development
  - Maintain market share of established regions
  - Increase length of stay for new regions
  - Leverage off OTA's market reach to generate destination awareness

yatra

VEENA WORLD
Travel. Explore. Celebrate.

Strategic Priorities – Consumer

- PR and Digital Engagement aligned with Tourism Australia's UnDiscover Australia theme
- Grow social and digital media footprint
- Enhance Queensland content in partnership with KDPs

Engaging with the Market

- Queensland on Tour India 2019
  - Dates: 17 - 22 February 2019
- Indian Inbound Tour Operator Famil
  - Timing: June 2019 TBC
- MICE support to Indian corporates
- Media and Trade Famil support

Key contacts

India

International Director | South and South East Asia

- Lim Mui Khim | khim.lim@queensland.com

Country Manager | India

- Ryna Sequeira | ryna.sequeira@queensland.com

Industry Servicing Manager | India

- Hina Mehta | hina.mehta@queensland.com

Morning Tea Break

10:20 – 10:50

The Americas

Leigh Arredondo

International Director

United States Market Update

- Faster than predicted GPD economic growth
- Record low unemployment and consumer confidence
- Heated political and social environment
- US travellers - shifting from experiential to personalisation

United States to Queensland

Country	Total Visitors	Annual % Change	3yr trend	Total Expenditure	Annual % Change	3yr trend
United States of America	232,000	1.6%	7.9%	$378.9m	3.7%	6.0%

Canada Market Update

- Growth and economic optimism despite US trade dispute
- Consumer debt will influence 3-year forecasts
- Outbound international travel trending up 11.5%
- Interest in beach, shopping and entertainment
- Asia leading aviation seat capacity growth

Canada to Queensland

Country	Total Visitors	Annual % Change	3yr trend	Total Expenditure	Annual % Change	3yr trend
Canada	59,000	0.0%	4.1%	$156.0m	13.7%	7.9%

Highlight project

Expedia & Key Distribution Partnerships

23,000+ QLD Visitors

49,000+ QLD Room Nights

Dundee 2.0

See the Set!

2018-19 Focus

HVT - FIT, DINKS and Families

Partner with airlines, OTA's and KDP's

Campaign period Nov to June 2019

Dual destination positioning

Leverage Consortia networks for conversion

Leverage Dundee 2.0 to maximize seasonality

Strategic Priorities – Aviation

- Qantas - Brisbane and network route optimisation
- Qantas - new route development
- Virgin Australia - Brisbane and network route optimisation
- Air Canada – Brisbane route optimisation

Strategic Priorities – Trade

- Dundee 2.0 Leverage
- Key Distribution Partnerships (KDP's)
- Online Travel Agency (OTA's)
- Consortia marketing networks B2B
- Retail Education - Aussie Specialist Program and trade events

Expedia®

TRAVELZOO®

Strategic Priorities – Consumer

- Dundee 2.0 Leverage
- Public Relations Program
  - News bureau, releases, media famils
  - Print and digital
  - Great Barrier Reef
  - Cultural Ambassadors
- Consortia marketing network B2C
- Social media engagement

Featured offers

Aussie Islands and Icons: Gold Coast, Reef, Melbourne and Sydney $2,599*

Spend 12 days exploring all the best beaches from north to south. Roll out your towel on the Gold Coast and cuddle a koala. Snorkel the Great Barrier Reef Islands and see the penguin parade before finding the hidden Sydney beaches on a harbor cruise.

VIEW OFFER

13 days in the Whitsundays, Sydney and Moreton Island wild dolphins

Hand feed wild dolphins and stay on one of the world's largest sand islands. Day cruise the Great Barrier Reef and explore Sydney with an indigenous guide. Hotel, air and select Hamilton Island and Tangalooma resort activities included for $2,999*

VIEW OFFER

First Time Visitor - 14 day Sydney, Uluru & Cairns Getaway for $4,329*

Sydney, Australia's largest city and capital of New South Wales. Uluru, a massive sandstone monolith in the heart of the "Red Centre". Cairns, the gateway to Australia's Great Barrier Reef, is a city lined with bars and restaurants.

VIEW OFFER

Engaging with the Market

- STO Australia Marketplace
  - August 26-29, 2019
  - Los Angeles, California
  - Registrations open March 5, 2019
- TEQ Queensland on Tour Americas
  - August 18-24, 2019
  - Cities to be Advised
  - Registrations open March 5, 2019
- TEQ trade famils

Key contacts

The Americas

International Director | The Americas

- Leigh Arredondo | leigh.arredondo@queensland.com

Acting Marketing Manager

- Michael Brown | michael.brown@queensland.com

Public Relations Supervisor

- Katie Barr-Cornish | katie.barrcornish@queensland.com

Public Relations Manager

- Emma Silverman | emma.silverman@queensland.com

Europe

Kai Ostermann

International Director

Europe Market Update

- Resilient - high expenditure, long length of stay and disperse
- Low unemployment with negative interest rates
- Positive growth in Working Holiday Visas (France)
- Traditional distribution channel is key for conversion
- Environmentally aware consumers
- Internet used for weekend breaks
- Main booking period October to April

Europe to Queensland

Country	Total Visitors	Annual % Change	3yr trend	Total Expenditure	Annual % Change	3yr trend
Germany	87,000	-4.2%	1.2%	$181.5m	-6.4%	3.5%
Scandinavia	46,000	8.0%	2.1%	$126.0m	16.9%	4.1%
France	45,000	10.6%	2.3%	$97.0m	25.6%	0.3%
Italy	27,000	27.4%	6.2%	$68.0m	24.3%	12.3%
Netherlands	23,000	12.0%	10.4%	$40.7m	-15.7%	0.2%
Switzerland	21,000	-11.4%	-1.8%	$54.1m	-2.5%	-1.1%
Other Europe	83,000	8.1%	4.8%	$155.4m	10.8%	-1.1%

Highlight project

- Billboard advertising and online promotion with Singapore Airlines and Explorer Fernreisen
- Supplement in travel magazine with Cathay Pacific and Boomerang Reisen

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2018-19 Focus

- Focus on High Value Travellers
- Strengthen relationships with airlines and Tourism Australia
- Campaign period October to April (European winter)
- Increase regional dispersal and expenditure
- Partner with traditional and non-traditional travel trade
- Focus on interest in the GBR, nature and wildlife

Strategic Priorities – Aviation

- Partner with Singapore Airlines via MOU and AAIF
- Ongoing support of Silk Air Singapore to Cairns services
  - Launch
  - Capacity increases
  - New aircraft

SINGAPORE AIRLINES

SILKAIR

Strategic Priorities – Trade

- Content-led co-operative campaigns
- Great Barrier Reef Campaign
- DERTOUR, Explorer Fernreisen, Travel Essence and Boomerang Reisen
- Klassik Radio (4M listeners in Germany)

Queensland AUSTRALIA

Strategic Priorities – Consumer

- Position Queensland as the ultimate holiday destination
- Amplifying Best of Queensland experiences
- Grow digital presence and social media in promotional activity
- Generate media exposure via press and publicity

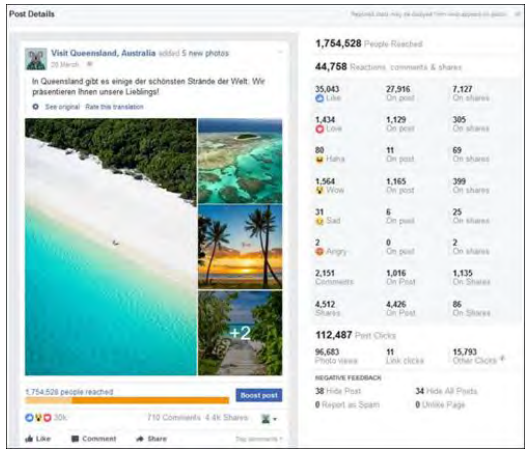
	June 2014	June 2018	Increase in %
Germany	4,857	67,451	+ 1.388 %
Italy	6,927	67,255	+ 971 %
France	3,202	29,210	+ 912 %

TEQ European Facebook followers since 2014

Queensland AUSTRALIA

Engaging with the Market

- Press, publicity, social media and e-newsletter
- Dertour VIP Travel Experts famils (June 2019)
- QLD On Tour Europe roadshow (Nov 2019)
- Tourism Australia roadshow in Germany, France and Italy



Key contacts

Europe

International Director | Europe

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Market Development Manager (France, Italy, Scandi, BeNeLux)

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United Kingdom

Michael Sommer

Western Markets Leader

UK Market Update

- Brexit (29 March 2019)
- UK economy has been stoic
- Positive economic indicators
- Consumer confidence
- Key travel trends and impacts
- UK outbound - 10 year high
- Commonwealth Games legacy

UK to Queensland

Country	Total Visitors	Annual % Change	3yr trend	Total Expenditure	Annual % Change	3yr trend
United Kingdom	232,000	2.1%	2.2%	$399.3m	-5.3%	-5.6%

Highlight project

Julia Bradbury's Australia $1.8M AVE

Tony Robinson "World by Rail"

Great Barrier Reef and Rainforest key focus

2018-19 Focus

- HVT – Gen Z to Baby Boomers
- Leverage opportunities with TA, KDP's and Airlines
- Booking periods (Sept-Nov) and (Jan-April)
- Promote Brisbane and Cairns as key gateways
- Encourage dispersal and length of stay
- Continued activity around GBR

Strategic Priorities – Aviation

- No direct access
- Wide choice - almost 1000 flight options a week
- Popular to open-jaw
- Encouraging inbound/outbound through Cairns
- Create partnership opportunities as no MOU's
- Working with Singapore Airlines, Etihad and Malaysia Airlines

SILKAIR

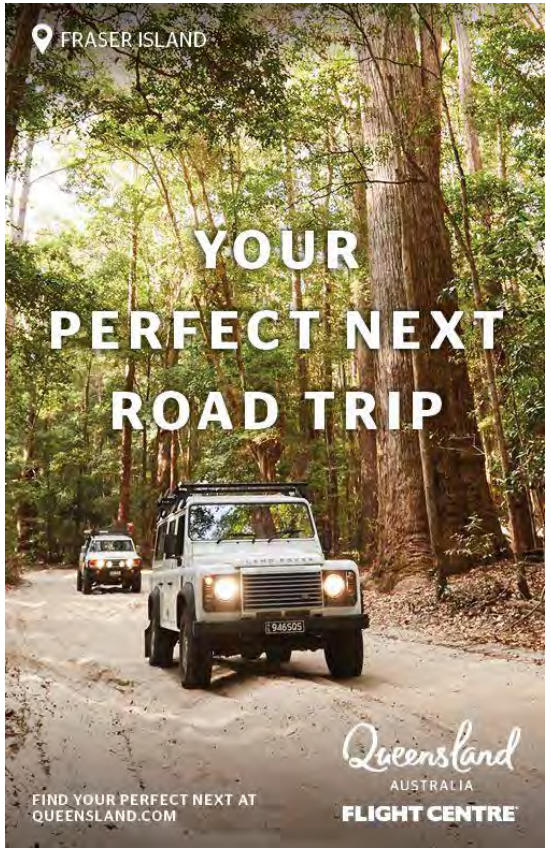
SINGAPORE AIRLINES

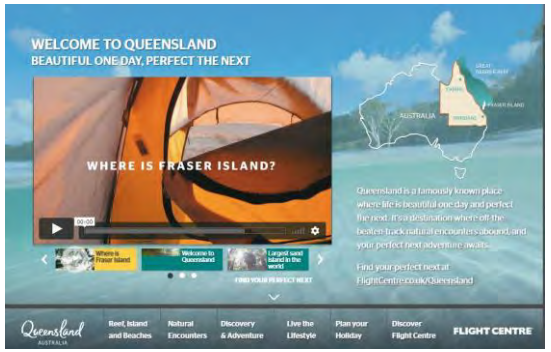
Strategic Priorities – Trade

- Product development to grow distribution
- Provision of content, assets and ideas
- Partner with KDP's and airlines
  - Flight Centre
  - Malaysia Airlines
- Training, famils, events and educationals
- Tourism Australia partnerships (ASP)
- Digital retargeting via OTA's

Strategic Priorities – Consumer

- Market the best address on earth
- PR – broadcast, celebrities and influencers
- Digital, Social and e-newsletters
- Tactical campaigns
- Partnerships
- Media famils





Engaging with the Market

- Queensland on Tour - November 2019
- Corroboree - October 2019
- Flight Centre mega famil - May 2019
- Trade campaign famil - May/June 2019
- Upcoming campaigns:
  - Trailfinders (January 2019)
  - Digital campaign (January-March 2019)
  - Flight Centre (March/April 2019)
  - Tourism Australia Youth and WHM (May 2019)

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Key contacts

UK

Trade and Marketing Manager | UK

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Trade and Marketing Executive | UK

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PR Director | UK

- Freya Boucher | freya.boucher@queensland.com

New Zealand

Mandy Veale

Trade Marketing Manager

New Zealand Market Update

- Economic growth slowing
- First year for labour lead coalition
- Rising fuel prices
- Credit and debit card spending highest in 7 years
- GDP increased by 1%
- Unemployment remains stable at 4.5%
- NZ dollar stable against AUD
- Airline alliances - Air NZ, VA and QF

New Zealand Market Update

- Fierce competition - Fiji, USA, Hawaii and Bali
- Difficult to compete on price
- Overfamiliarity and pre-conceived notions
- Cruise market growing especially South Pacific
- Adventurous market - limited knowledge of wider geographic regions

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New Zealand to Queensland

Country	Total Visitors	Annual % Change	3yr trend	Total Expenditure	Annual % Change	3yr trend
New Zealand	468,000	1.3%	3.4%	$563.1m	-4.0%	1.8%

Highlight project

Editorial Value
$1.37M
(33 Full Pages)

House of Travel
Retail partner integration

MiNDFOOD May issue
24-pages of unique content

2018-19 Focus

- Empty Nester Couples (40-59) and DINKS - HVT*
- Maintain airline and trade partnerships
- Target key events that resonate with the market
- Support year round and seasonal air services
- Increase number of Aussie Specialist agents
- Grow visitation and length of stay during key winter period

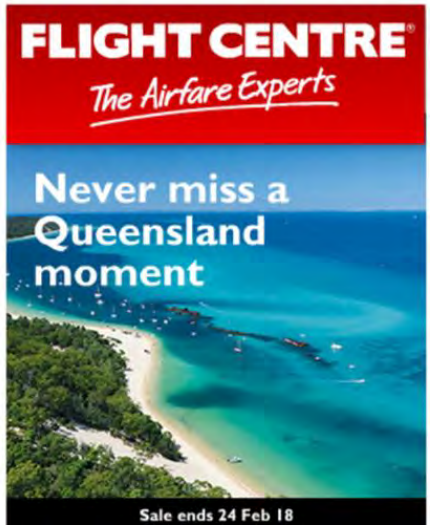
*High Value Travellers – currently undertaking research in this sector

Strategic Priorities 18/19 – Aviation

- Support Air NZ services to key airports
  - Brisbane, Gold Coast, Sunshine Coast and Cairns
- Maintain relationships with other airlines
  - Air Asia, Virgin Australia and Qantas
- Build relationships with airports
  - Dunedin, Queenstown, Christchurch, Wellington and Auckland

Strategic Priorities 18/19 – Trade

- Stimulate the desire travel to through tactical campaigns
- House of Travel Winter campaign
  - February–June 2019
- Air NZ campaigns
  - Queensland: 21 January - 19 February
- Flight Centre campaigns
  - Queensland: 21 January – 25 February
  - Tropical North Qld: 16 – 22 June



Strategic Priorities 18/19 – Consumer

- Market the best address on earth
- Grow repeat visitation by telling the story of Queensland's destinations
- Highlight new reasons to travel and stay longer
- Identify the Best of Queensland Experiences which resonate with Kiwis
- Winter Campaign - editorial (NZME)
- Optimise a world-class events calendar
- Unpack the NZ High Value Traveller

Queensland AUSTRALIA

Engaging with the Market

- Air NZ "The Greater Aussie Experience" famil program
- VIP Product Managers famil – Air NZ
- Queensland on Tour (biannual event)
- Aussie Specialist Program - incentives
- Co-operative marketing opportunities

Queensland on Tour – May 2018

Trade famil - October 2018

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Key contacts

New Zealand

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Thank you for attending the TEQ International Market Briefings 2018