

NEW ZEALAND

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Overview

- 4.2 million people
- Significant growth in the 65+ age group
- More New Zealanders are migrating to Australia than arriving; although the gap is closing due to tighter immigration entitlements for non-NZ citizens into Australia (VFR potential).
- For 2007, GDP growth was at 3.1% and CPI growth at 3.2%. During 2008/09 it is expected that GDP will remain fairly constant increasing 0.1% and CPI will increase to 4.5%.
- Consumer confidence is forecast to remain low during 2008/09, due to the weakening NZ dollar and the current international financial situation. Weak economic growth is predicted to continue until mid/late 2009.
- Unemployment remains low (3.6%) but is increasing with a half of one percent rise in the last quarter.
- 83% of population are potential travellers
- Total outbound travel market from New Zealand was 1.97 million trips for the year ending June 2008, a 2.8% increase on the previous year.

Market Summary

- In line with the ongoing move towards greater vertical and horizontal integration, there has been further rationalisation of the NZ trade this year. Stella Travel Services have recently reviewed their NZ wholesale operation and from 13 October, GO Holidays will take over sole management of Stella's wholesale operation, with Gulliver's Holidays disappearing from the NZ market completely by 31 March 2009. Stella's retail brands, Harvey World Travel and United Travel, remain unaffected as a result of this review.
- At retail level there has also been significant change. The Holiday Shoppe chain re-branded to Harvey World Travel on 8 September and a new group, Flavour Travel Group, has entered the market. Flavour is a breakaway group from the former Holiday Shoppe brand, headed by Digby Lawley. They operate 2 retail brands Mondo Travel (currently 14 mainstream travel stores) and Latitude Travel Group (a more niche, special interest business product). Flavour wholesales through Infinity Holidays and deals direct with some product. For the time being, United Travel has decided against its proposed re-branding to American Express Travel Scene. Flight Centre plans to diversify its product offering by launching two new online splash pages aimed directly at first class and business travellers, and is developing a stable of niche retail agencies, focusing on specific holiday experiences, such as cruising.
- Generally, wholesalers have a conservative outlook for 2008/09. Outbound business has remained constant until now, however many are expecting short haul destinations, such as Australia to increase in popularity, as the current global financial situation and falling NZ dollar deters travellers from long haul destinations. As a result, a number of wholesalers are expanding their Australian product range for 2009. They are looking to include more experiential and outback product, leveraging the activities and opportunities around Australia - the movie. In contrast to last year, these wholesalers are considering increasing their co-operative above-the-line marketing but very much on their own terms.
- The Air NZ non-stop services between ADL and AKL have had a successful year with the airline reporting good load factors year-round i.e. on par or above the Eastern States. For the 2008/09 summer season, Air NZ will offer a total of 21 weeks of daily flights (a 200% increase on 2007/08). By December 2008, Air NZ will have completed a full re-fit of all trans-Tasman aircraft (including seats, in-flight entertainment etc.) and intend to focus on this as their point of difference in the market place.

- According to the latest IVS data (i.e. year ending Jun 2008), visitor numbers to South Australia from New Zealand remained fairly steady at 39,200. The number of nights spent in South Australia by New Zealanders increased by 18% to 487,000 (vs. the same period in 2007).
- Airline capacity across the Tasman will increase substantially during 2008/09 with Pacific Blue introducing new AKL-MEL-AKL and AKL-SYD-AKL services and Jetstar set to add AKL-SYD-AKL and AKL-OOL-AKL to its existing schedule.
- The internet remains the major information and booking source for NZ travellers to Australia, with only 40-45% using a travel agent to book their holiday.

Non Stop AKL/ADL Flight Details

Four years since launch, Air NZ continues to operate non-stop flights between AKL and ADL. During the 2008 peak, summer period through until the end of April 2009, flights will operate daily. During May 2009, there will be six flights per week (everyday except Wednesday), consolidating to 5 flights per week for the 2009 off-peak, winter period (everyday except Wednesday and Saturday).

Air NZ intend to drop their long term pricing by approximately 20% in 2009, in response to competitor fares and the increase in low cost carriers on the route.

The first flight of the day from Christchurch connects with the AKL/ADL service, making South Australia more accessible to South Island travellers.

Market Profile

- Over 1 million New Zealanders visited Australia in 2007/2008 with 39,200 visiting South Australia.
- Although there is a perceived over-familiarity of Australia as a holiday destination, SA is regarded as an immature market with low general awareness of what the destination has to offer.

NZ Visitors to Australia and South Australia, year ending June 2008

	To Australia	To South Australia
Total NZ Visitors	1,014,400	39,200
Total NZ Visitor Nights	13,971,000	487,000

Source: Bureau Tourism Research, International Visitor Survey (IVS), persons 15 years and over

NZ Visitors - Reason for Stopover in South Australia, 2007-08

	Visitors* %	Nights %
Holiday/pleasure	54	47
Visiting relatives	17	16
Business	10	6
Visiting friends	8	4
Attend convention/conference/seminar/trade fair/exhibition	6	2
Employment	5	22
Participate in or watch organised sport	2	1
Education	1	<1
On honeymoon	<1	<1
To experience food, wines and wineries	<1	<1

* This column may sum to more than 100% because visitors with multiple stopovers may have different reasons for visiting each SA stopover.

Source: Tourism Research Australia (TRA) International Visitor Survey (IVS)

NZ Holiday Visitors – Length of Stay in Australia, 3 Year Average to June 2008

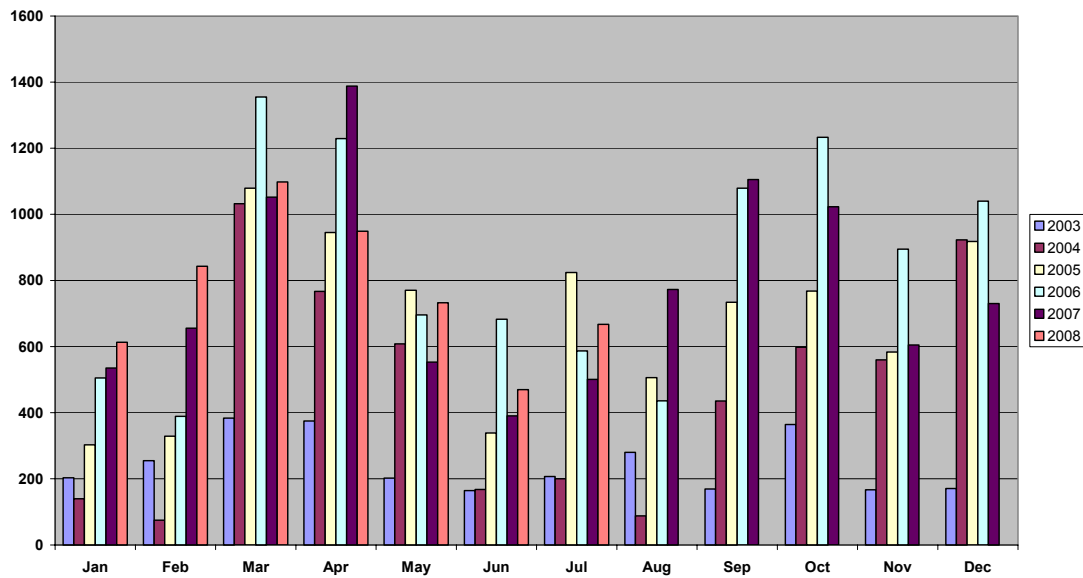
	Australia (overall) %	SA (specifically) %
1 to 9 nights	59	26
10 to 39 nights	38	64
40 to 99 nights	2	5
100 to 199 nights	1	3
200 nights or more	<1	1
Total	100	100

Holiday visitors Australia (main purpose of visit to Australia)

Holiday visitors to SA (stopover purpose of visit)

Source: Tourism Research Australia (TRA) International Visitor Survey (IVS) excludes in transit to Australia

NZ Holiday Travel to SA 2004-2008



Source: ABS OAD Data/SuperCross/DTEI-Policy & Planning

NZ Visitors to South Australia - Regions Stayed Overnight 2007-2008

% of NZ visitors to South Australia who stayed overnight in:	
Adelaide	91
Limestone Coast	14
Flinders Ranges & Outback	12
Barossa	7
Eyre Peninsula	7
Murraylands	6
Clare Valley	4
Fleurieu Peninsula	4
Riverland	3
Kangaroo Island	3
Adelaide Hills	1
Yorke Peninsula	1

Can add to more than 100% as visitors may visit more than one region on their visit to SA.

Source: Tourism Research Australia (TRA) International Visitor Survey (IVS)

NZ Visitors to South Australia - Places Visited 2007

% of NZ visitors to South Australia who made a visit to:	
Glenelg	51
Adelaide Hills Mt Lofty Summit Hahndorf	44
Barossa Valley	41
SA Wineries / Cellar door	40
Adelaide Central Market	36
River Murray	30
North Terrace attractions (e.g. museum art gallery etc)	19
SA National parks/bushland	18
Victor Harbor/Goolwa	17
McLaren Vale wine region	14
Flinders Ranges/Wilpena Pound/Arkaroola	10
Kangaroo Island	6
Cooper Pedy opal fields	5

These estimates are based on respondents who were asked this question

Source: Tourism Research Australia (TRA) International Visitor Survey (IVS) Question last asked in 2007

Key Activities in 2008

Trade Activities

- OZ Talk Travel Expo is the key trade-training event on the New Zealand travel industry calendar. Over 190 front line travel consultants met with over 135 Australian operators in booth style sessions during the two-day event. Twelve South Australian operators participated in OZ Talk 08. The event was highly successful, and the increase in interest and knowledge shown by agents definitely suggested they were more aware of SA as a potential holiday destination.
- SATC NZ currently operates its own SA Online Training Programme for travel agents (SAOTP), in addition to participating in Tourism Australia's Aussie Specialist Programme (ASP). Currently, 716 retail and wholesale consultants are registered in both programmes, with 50 having successfully completed all 3 modules. From early 2009, the SAOTP will be phased out in favour of the ASP, which is now fully aligned with the SAOTP.
- Sales Development Services (SDS) works on behalf of SATC NZ to provide qualified sales representation to retail travel agents through out NZ. They provide SATC NZ with a mechanism to measure the awareness and knowledge of South Australia at the retail level, as well as consumer trends and feedback. After a successful five month trial during 2007, SDS has been engaged to complete a full series of 720 sales calls across NZ during 2008/09. Each SDS representative distributes, then talks the agents through a Quick Facts and Resource Information Sheet and ensures they are aware of the SATC NZ office and the services we offer.
- Infinity Holidays, Flight Centre, Travelplan and House of Travel staff all received destination and product training on South Australia this year. Training sessions with GO Holidays staff will be scheduled once the merger between Gulliver's Holidays and GO Holidays is complete.
- A total of 20 agents will travel to South Australia on three separate SATC hosted-famils this year. These famils cover Adelaide, Adelaide Hills, the Barossa, Clare Valley, Fleurieu Peninsula, Flinders Ranges, Murray River and Kangaroo Island. Air NZ Holidays also undertook a famil to Adelaide, Adelaide Hills and the Barossa in August 2008 (12 agents) and the Product Manager from Eden Tours (New Caledonia) participated in a pre-ATE famil to Adelaide, Flinders Ranges and Kangaroo Island.

- The 'self famil' program has been operating in New Zealand for 4 years. Over 115 agents have travelled to-date. In an attempt to measure its usage, SATC NZ offers participating agents two free Metro passes.
- SATC New Zealand's quarterly trade e-newsletter, 'Outbound SA', is emailed to approximately 2,500 agents across the country.

Consumer Activities

Campaign

- Since the commencement of Air NZ's direct flights from AKL – ADL in 2004, SATC NZ has been actively promoting South Australia to the NZ market via an annual six-month brand campaign. The objective of the campaign is to build awareness of South Australia and the unique experiences it has to offer holiday-makers. From 2004 – 2006, AUD\$1.6 million was invested in these campaigns, followed by a further AUD\$1 million investment, ensuring the campaign continued through to 2008.
- A major component of the campaign is TV advertising. Four different executions feature the key experiences we know appeal to our market segments. The ads focus on (1) Adelaide and surrounds (including Hahndorf and beaches), (2) Barossa – food and wine generally; (3) Murray River – houseboating and cruising, (4) Flinders Ranges and Outback. A well-known New Zealand personality, Luanne Gordon, 'fronts' the ads encouraging Kiwis to come and discover the many and varied secrets of South Australia. The ads are 45 and 60 seconds in duration and are presented in a travelogue style.
- In 2008, the TV advertising was supported with a direct response postcard initiative and increased online activity, including a much stronger Search Engine Marketing campaign, banner advertising and sponsored link advertising. Plus, a dedicated South Australia channel was launched on Sky TV.
- The reach and impact of the 2008 campaign was increased with a one-month co-operative marketing campaign with the NZ Herald and one of NZ's biggest supermarket loyalty programs. Valued at NZD\$230K the campaign included a 4-page wrap over 100,000 newspapers followed by four weeks of print, radio, in-store and online advertising.

2008 Brand Campaign Results

- Now in its fourth year, our TV advertising continues to generate awareness of South Australia and stimulate strong brand recall – consumers and travel agents often mentioning the ads when they visit our booth at expos and travel shows. Initial results of this year's campaign provided key insights into the most effective channels and time slots, which were then implemented and resulted in a 24% increase in the response rate.
- The Sky TV channel proved its strength as a brand awareness tool and an innovative way to re-refresh the campaign. Sky TV reported that the South Australia channel received an average dwell time of eight minutes.
- The online banner advertising produced a click through rate of 0.8% - eight times the industry benchmark. The search engine marketing campaign delivered a strong conversion rate of 60%, with the learnings invaluable for the upcoming re-development of the SATC NZ website.
- Added into the campaign as a result of additional funding, the direct response postcard initiative performed well, producing the best return on investment.
- The NZ Herald co-operative campaign generated 95,000 responses.
- Wholesale and retail head offices continue to be enthusiastic about our campaign however; House of Travel has been the only group to show support by producing a tactical flyer for inclusion in our response packs.

- Retail travel agents are reporting an increase in enquiries regarding South Australia as a holiday destination.

PR Activity

- Regular press releases highlighted current news, events, product and regional profiles.
- South Australia has received some excellent TV, print and radio coverage this year, due to the Premier's visit and the Department of Trade and Economic Development's (DTED) sponsorship of the NZ Herald Careers Expo. The coverage focussed on the strong and varied career and lifestyle opportunities on offer in South Australia.

Media Famils

10 journalists have travelled to South Australia this year, visiting a variety of destinations and events.

Consumer Shows

For the first time, a one-day consumer Travel Expo was included in the OZ Talk program for 2008. The consumer Expo was attended by over 6,000 people, who generated approximately NZD\$500K in sales. South Australia achieved 18% of these sales, second only to Queensland (at 52%). A second one-day consumer Expo is planned for the OZ Talk 2009 event.

During 2008 SATC NZ, in co-operation with other STOs, attended the Auckland Food Show. SATC was also present at the Auckland House of Travel and Flight Centre Travel Expos, the inaugural Eden Tours Travel Expo in New Caledonia and the NZ Herald Careers Expo (in conjunction with DTED).

G'day Week

The Great Australian Lunch was held on 2 May. This progressive-style lunch highlighted Australia's world-renowned food and wine industry. SATC NZ sponsored a course, showcasing South Australian produce including dried fruit, nuts and olives.

Consumer Newsletter

SATC NZ's quarterly consumer e-newsletter, 'Outbound SA', is emailed to approximately 10,000 New Zealanders across the country.

Key Challenges

- High staff turnover within the travel industry means that agents trained to sell Australia/South Australia either leave the industry or move onto selling other destinations relatively quickly. This is compounded by the trend for the newest/youngest staff in an agency to sell Australia, driving a constant need for training that is impossible to meet. Consumer awareness is definitely on the increase; however the increase in consumer-direct bookings via the internet means substantial time and money needs to be spent promoting South Australia's 'something different' holidays experiences within this medium, so we can to convert travellers from the 'overly familiar' East Coast destinations.
- Brand campaign wear out (i.e. TV advertising is now 4 years old) and the high cost of producing new ads will provide an ongoing challenge for 2009 onwards.
- The cost of flights to South Australia is approximately NZD\$100-NZD\$150 more expensive (each way) than the East Coast cities and this is compounded for travellers who live outside the main NZ cities and require additional domestic flights to reach the international gateways. The substantial increase in trans-Tasman seats on low-cost carriers during 2008/09 will further challenge these costs.
- South Australia is in constant competition with the other Australian states and the South Pacific islands for the NZ travel dollar, many of which have funds and product

support to produce and promote regular tactical campaigns e.g. 50% off New Caledonia holidays.

- In addition to the cost of access, fuel surcharges, a weak NZ dollar and global economic uncertainty, are all affecting the decision-making processes of NZ travellers.
- As the NZ wholesale market continues to consolidate, the number of avenues for promoting South Australia decreases, while competition for brochure space and co-op marketing opportunities increases.
- There is limited South Australian product offered through traditional distribution methods e.g. wholesale brochures.

Marketing Opportunities for SA Operators

SA Product Manual

It is highly recommend that all operators apply to list their product or services in this directory. All other Australian States represented in the NZ market distribute a travel planner or comprehensive product manual to the wholesale and retail trade. As travel agents and the consumer have very limited access to South Australian products and information through the current wholesale programmes, the South Australian Product Manual is often the first reference guide used by many agents looking for South Australian product information.

For this to be an effective and successful tool, the Product Manual must feature a diverse and comprehensive array of products and services. It must be perceived by the trade as *the* source of information on South Australia, and the first place to look to answer any product or destination queries. SATC distributes copies to all agencies and SATC NZ use and promote this Product Manual at all trade-training sessions.

Applications for the 2009 Product Manual (1 April 09 – 30 March 10) have closed, however if you are interested in being involved in the 2010 version email belinda.barton@tourism.sa.com.

Australia Travel Market

You may already be familiar with the Australia Travel Market (ATM) website that has been operational in the UK for the last few years. The team behind ATM have now launched a dedicated version of the site for the New Zealand market (www.australiatravelmarket.co.nz). Briefly described, ATM is an aggregator or search network for Australian travel product such as accommodation, tours, attractions, cruises etc. The ATM New Zealand site receives 40,000 visitors per month (and growing). This website is a very cost effective way (AUD\$600 per annum) to promote your product direct to the New Zealand market year-round. For those of you already involved with ATM in the UK, you will already have a listing on the New Zealand site (one payment covers a presence on both the UK and NZ sites). Those of you listed on the Australian Tourism Data Warehouse (ATDW) database already have a basic listing on the ATM New Zealand site however direct partners receive a prioritised listing and a range of additional benefits. For more information, please contact Kris Shapley via email at kris@satc.co.nz.

Brochure Distribution

SATC NZ keeps small supplies of operator brochures in their office to send out in response to specific consumer or agent enquires. If you would like to send the SATC NZ office a maximum of 20 copies of your brochure, please mark them clearly as "Brochures for SATC NZ", and send them to Matt Guy. He will arrange for them to be sent to NZ on your behalf.

Explore SA – New Zealand Self-Famil Program

The SATC has put together a self-famil program, aimed at encouraging New Zealand travel agents or wholesale consultants to visit South Australia at their own expense. Over 60 South Australian operators have offered deals on accommodation, attractions and touring to NZ travel agents, which is available on SATC's NZ website (trade section accessed through agent code). The current program runs until 31 March 2010. Please contact Matt Guy if you would like to be involved in the program. Please remember the better the deal the more likely you are to attract agents to your operation!!!

Trade and Consumer E-Newsletters

The SATC NZ office produces quarterly agent and consumer e-newsletters. SA operators are welcome to submit product information for inclusion in these newsletters. Information is included at the discretion of the SATC, and will depend on space availability, relevance to the particular market and the theme of the newsletter. If you are interested in submitting information for the e-newsletters, please submit a short description of your business or new product (max. 50 words), and one high-resolution image to ryan@satc.co.nz.

Trade Visits to New Zealand

For SA operators who are serious about increasing their business from NZ, and want to get their product into NZ wholesale programs, we strongly recommend you budget for an annual visit to NZ. **Important:** Please talk to the SATC NZ office before you undertake a sales trip to NZ, to ensure your product is suitable for NZ wholesalers to package.

Useful Tips and Hints

- Remember that SA is a developing market, accounting for 4% of all NZ visitors to Australia. (ie. NZ a small player in the overall scheme of things!)
- A coordinated approach to the industry is important.
- Always advise SATC NZ office of your visit and keep them updated regularly.
- Wholesalers are interested in:
 - Volume
 - Mainstream and experiential product
- Always make appointments.
- Be concise and to the point, 20 / 30 minutes max.
- Be enthusiastic about your product.
- Don't smoke before an appointment!!
- Make it easy for the industry to accept your product
 - Payment by bill back is the norm
 - Free-sell accommodation facility
 - Minimal closeout periods & seasons
 - Provide brochure editorial
 - Provide hi-res JPEG images on CD
 - Be willing to participate in special promotions
- Honour your wholesale rates – remember to offer Australian domestic specials to NZ wholesalers featuring your product.
- Keep wholesalers up to date with any changes going on in your business.

OZ Talk New Zealand

This is the key in-market event for South Australian operators who are packaged by NZ wholesalers. It is recognised as the largest trade show outside of ATE. From a travel industry perspective, OZ Talk NZ aims to educate and up-skill frontline retail, wholesale and corporate travel agents. This event provides Australian operators with an exceptional opportunity to promote their products, as well as offering a chance to make sales calls on the key wholesale product managers. From 2008 onwards, this annual travel forum will also offer the opportunity to present their products to NZ consumers via a one-day

consumer Travel Expo, in addition to the retail and wholesale travel industry. OZ Talk NZ is being held from 17 to 19 April 2009. Registrations are now open.

Famils

Each year SATC NZ hosts a number of famils to South Australia. SATC NZ may approach you about using your product in the itineraries. Any support you can offer is greatly appreciated, whether it is providing a discounted or industry rate or value adding your product in some way.

Brochure Distribution

Travel Marketing offer a brochure storage and distribution facility for the NZ travel industry. For those South Australian operators who are sold extensively throughout NZ, and distribute a number of brochures, you may consider using Travel Marketing for your brochure storage and distribution. Through their website agents can order brochures and other marketing collateral from local and overseas suppliers including major airlines, coach tour and cruise operators and other destination tourism authorities.

Travel Marketing provides an extensive range of marketing services including marketing representation, wholesale and retail sales calls, distribution of product brochures, fax stream facility, trade press releases, flyer production and distribution, placement of advertising and a reservations facility. Contact Donal O'Sullivan on +64 9 917 4440 or donal@travelmarketing.co.nz.

Media Opportunities

Tabson is the key weekly travel publication distributed to the travel industry, outlining latest product, airline and industry news. Travel Today is a one page email newsletter sent out to the industry on a daily basis. Both publications are always looking for current news and information. Email any press releases or updates to Tony Dominey at tony@tabsontravel.co.nz.

The Travel Memo is a twice weekly news publication distributed to all retail travel agents, as well as over 500 other industry related organizations/personnel. Contact Kevin Blackford on +64 9 449 1449 or email kblackford@thememo.co.nz.

TravelTrade is a fortnightly colour publication focusing on travel industry news, destination travel news and destination features. Circulation of over 1,400 copies. Editorial and advertising opportunities are available. Traveltrade also publish The OZBOOK - a trade publication distributed to all travel agents nationwide. You could be approached to advertise in this publication. Please contact Lorraine Howard, Advertising Sales Manager on +64 9 529 3002 or email lorraine@traveltrade.co.nz.

Travel Digest is a monthly A4 colour publication focusing on travel industry news, destination features and industry sector updates. Circulation of over 1,500 copies. Editorial and advertising opportunities are available. Please contact Lorraine Thomson, Publisher/Editor on +64 9 366 0404 or email lorraine.thomson@methode.co.nz.

KEY WHOLESALE/TRADE PARTNERS
TIER 1 WHOLESALERS

Company	Product Managers	Company Size	SA Product Brochured	Comments
Air NZ Holidays Private Bag 92007, Auckland 1142 Air New Zealand House, 185 Fanshawe Street, Auckland 1010 Ph: 64 9 336 2918 andrea.stowers@airnz.co.nz	Andrea Stowers	Medium	Limited SA product on their website only. Do not produce a printed brochure for Australia (except QLD). ADL Accom Barossa Day Tours	Retail chain - Air NZ Travel Centres
GO Holidays PO Box 91 444 151 Victoria Street Auckland Ph: 64 9 307 4685 debrap@gullivers.co.nz <i>NB: The above phone & email contacts are temporary. They will be updated as soon as the information becomes available.</i>	Debra Phillips	The largest NZ wholesaler. GO will have absorbed Gulliver's Holidays by 31 Mar 09 to become the sole wholesaler for the Stella Travel Services Group in NZ.	<u>Gulliver's Holidays:</u> Stand alone SA brochure (2008) Day Tours ADL Accom, B&Bs Barossa ADL Hills Clare Valley McLaren Vale Flinders/Outback Kangaroo Is River Cruising Houseboating Rail Journeys Self Drive Itineraries <u>GO International:</u> Packaged in Aust brochure (2008) ADL Accom, B & B's ADL Hills Barossa Clare Valley McLaren Vale Flinders/Outback Kangaroo Is Day Tours River Cruising Houseboating Rail journeys	Retail chains - Harvey World Travel (formerly Holiday Shoppe) - United Travel - First Travel Group - Flight Centre - Independents
Infinity Holidays Level 3, 124 Vincent Street Auckland Ph: 64 9 301 9200 Melissa_Bloomfield@infinityholidays.co.nz	Melissa Bloomfield	Growing wholesale operation – specifically set up to keep profit in-house with Flight Centres.	Packaged in Aust brochure. Good SA coverage. (2008) ADL Accom Day Tours Barossa Flinders & Outback Kangaroo Is River Cruising	Retail chains - Flight Centre - Mondo Travel - Latitude Travel Group

			Houseboating Rail journeys	
Travelplan PO Box 13 037 2 nd Floor, 210 Oxford Tce Christchurch Ph: 64 3 374 0565 jthomas@travelplan.co.nz	June Thomas	Second largest NZ wholesaler with excellent distribution through strongly performing agency chain – House of Travel.	Packaged in Aust brochure. Great supporter of SA and SA product. (2008) ADL Accom, B & Bs Barossa Clare Valley ADL Hills Kangaroo Is Flinders & Outback Day Tours Self-Drive Itineraries River Cruising Houseboating Rail journeys	Retail chains - House of Travel - Independents

TIER 2 WHOLESALERS

Company	Potential Delegate(s)	Company Size	SA Product Brochured	Comments
AIM Holidays PO Box 89-060, Auckland 0742 32 Ian Sage Avenue, Long Bay, Auckland Ph: 64 9 477 1090 michael@aimholidays.co.nz	Michael Macpherson	Small niche wholesaler	Agent for Australian based Great Aussie Holidays wholesaler and GSA for QF Holidays (this is kept very quiet in NZ market!). Also specialist in events tickets and niche products e.g. Wayward Bus.	Niche product to Australia Has access to full QF Holidays product range although they can not market under this branding (an agreement to protect NZ wholesalers relationship with QF)
Keith Prowse PO Box 305-291, Triton Plaza North Shore City 0757 28 William Pickering Dr, North Harbour, Auckland Ph: 64 9 477 4831 andreesabourin@keithprowse.com	Andree Sabourin	Very small		Special events wholesaler
Travel Marketing 71B Apollo Drive North Harbour Auckland Ph: 64 9 917 4440 admin@travelmarketing.co.nz	Joseph O'Sullivan	Small		Specialise in cruising Currently store and distribute SATC NZ brochures to all agents.

SOUTH AUSTRALIA PRODUCT IN THE NZ MARKET BY WHOLESALER 2008/09

Contracting begins at ATE and continues on through to December. The majority of brochures are valid from 01 April 2008 to 31 March 2009

Wholesaler	Dedicated SA brox no. of pgs	SA pgs within Aust brox	SA pgs within Selected States brox	ADL	Wine region	KI	Murray River / Cruising	Coach Tours	Self-drive
Gulliver's Holidays	22	-	-	✓	✓	✓	✓		✓
Travelplan	-	14	-	✓	✓	✓	✓		✓
GO Holidays	-	21	-	✓	✓	✓	✓		✓
Air NZ Holidays		Online only	-	✓	✓				
Infinity Holidays	-	10	-	✓	✓	✓	✓		
TOTAL PAGES	67								