## **AUNZ REPORT**

## **JULY 2024**



Prepared By:



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### **ABOUT TSUSA**

### **Global Partner Programming**

The latest arrival figures released report 95,776 Australian visitors to the USA in May, up 4% on 2023, and reaching 76% of 2019 levels. Australia was the 10th largest long-haul market into the USA for the month of June and YTD (Source i94 arrivals).

In terms of visitation from New Zealand to the USA, in June there were 24,041 visitors, down 7% on June last year.

4,005 Australians listed a Travel South state as their first intended address in June, equaling 4% of total USA visitation, and up 6% on last year. (Source i94 arrivals – first intended address).

Also, the latest arrival stats from the Australian Bureau of Statistics have been released this month. Reporting on residents returning from a short-term trip, in May the top 10 countries were:

USA bounced back to its usual position 3 in the table after being bumped down to 4th by Japan in April

| Top 10 countries in May 2024 | Number of Australian residents returning from that country | % change YOY |
|------------------------------|------------------------------------------------------------|--------------|
| Indonesia                    | 127,650                                                    | 18%          |
| New Zealand                  | 78,060                                                     | 7%           |
| USA                          | 64,210                                                     | 12%          |
| Japan                        | 59,200                                                     | 72%          |
| UK                           | 44,280                                                     | 8%           |
| Thailand                     | 41,620                                                     | 0%           |
| China(b)                     | 41,100                                                     | 64%          |
| Fiji                         | 32,080                                                     | 7%           |
| Vietnam                      | 29,960                                                     | 24%          |
| India                        | 29,060                                                     | 1%           |

Travel South USA was announced as a nominee for the Australian National Travel Industry Awards (NTIA).

- <u>Cosmopolitan magazine</u> is set to make its return to the Australian market on August 12th under the leadership of Publisher Katarina Kroslakova and her publishing house, KK Press, in collaboration with Hearst Magazines International.
- Award-winning independent youth publisher <u>Junkee Media</u> has relaunched with a new website and brand identity. Junkee's new era brings in a greater focus on its key verticals: Social Justice, Music and Culture. These areas are explored by the team along with key contributors, generating conversations across Junkee's social platforms TikTok, Instagram, Pinterest, YouTube and Junkee's brand new website.
- Honida Beram aka Cruising with Honey has joined <u>9Travel</u> as a contributor, producing a new column <u>Cruising with 9Travel</u>. The column will run fortnightly.

| ood & Drink, Well | ness, Film, Music, Ar | t, Product Reviews | ialty areas are Luz<br>, Grooming. |  |
|-------------------|-----------------------|--------------------|------------------------------------|--|
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## I. EXECUTIVE SUMMARY

- Adelaide Sales calls with Phil Hoffman Travel Training and home based cluster training
- Brisbane Sales calls
- International Showcase registrations
- NTIA Most Popular Tourist Office nomination, announcement newsletter and voting strategy
- We spent a day in Auckland chatting with New Zealand media; educating them on the South and exploring potential opportunities.
- Missouri was featured as the front cover story on Traveller for a feature on Route 66, off the back of Katrina Lobley's GMM fam.
- Confirmed the Concrete Playground Travel South Campaign proposal.

|                                 | Australia                          | Jul        | Aug | Sept | Oct | Nov | Dec | FY 25<br>Total |
|---------------------------------|------------------------------------|------------|-----|------|-----|-----|-----|----------------|
|                                 | Travel Trade                       |            |     |      |     |     |     |                |
| 9                               | Trade Meetings                     | 30         |     |      |     |     |     | 30             |
| Partners                        | Number of Agents Trained           | 133        |     |      |     |     |     | 133            |
| AL/KY/L                         |                                    |            |     |      |     |     |     |                |
| A/<br>NC/SC/TN<br>/WV/MO/<br>MS | Media Meetings                     | 12         |     |      |     |     |     | 12             |
|                                 | Total number of articles published | 12         |     |      |     |     |     | 12             |
|                                 | Impressions                        | 14,804,911 |     |      |     |     |     | 14,804,911     |
|                                 |                                    |            |     |      |     |     |     |                |

## II. COMMUNICATIONS & PR

- Followed up with journalists who attended GMM and associated reporting.
- New Zealand media meeting blitz.
- Confirmed the Concrete Playground Travel South Campaign proposal.
- Earned media Coverage Book

#### **COVERAGE:**

# What surprised me most as a gay man travelling in Kentucky, one of the most conservative US states



**OPINION:** I must admit I had some trepidation before heading to Kentucky for work earlier this year.

I have been to the liberal bastions like San Francisco, New York and Chicago before, but never to a deeply red Republican US southern state. As a gay man, my expectation of this part of the world was that it's not exactly welcoming to 'my sort'.

After all, this is home to an infamous county clerk who gained worldwide headlines for refusing to issue marriage licences to same-sex couples. It's also represented by a variety of firebrand US politicians like Rand Paul and Mitch McConnell. And at the last presidential election in 2020, Donald Trump comfortably won 62% of the vote.

I am pleased to say that all of my stereotypes were completely shattered, albeit with one large caveat. You see I visited the large university cities of Louisville and Lexington - both left-leaning blue dots in a vast sea of red, where I was welcomed with open arms. No-one flinched when I casually dropped the word 'husband' when talking about my relationship back in Wellington. No pitchforks were spotted on the horizon.

But what surprised me most was the sheer number of pride and progress flags.

Rainbows were everywhere, flying from town halls, tourist offices, shops, irish pubs and restaurants and it wasn't even June, the traditional month for Pride in the US. It was boring old April. Lexington even has a rainbow crossing which would surely trigger some snowflake zealots. Had I entered some sort of Kylie Minogue-sound tracked alternate reality? I should be so lucky.





Earlier this month, Kentuckiana Pride Festival had 25,000 people attend.

I am not naive or stupid to know that stepping foot into the more rural parts of Kentucky, I may have felt less confident. One gay guy I spoke to warned that some folk may be smiling and welcoming to your face, but happy to vote your rights away behind your back.

But Missy Spears, executive director of <u>Queer Kentucky</u>, told me that a lot of people outside of the state have a wrong impression of it.

"More LGBTQI+ people live in the South than in any other part of our country, yet the national narrative around this region remains focused on anti-LGBTQI+ efforts, with little mention of the people, places, and organisations that make our state beautiful and welcoming," said Spears.

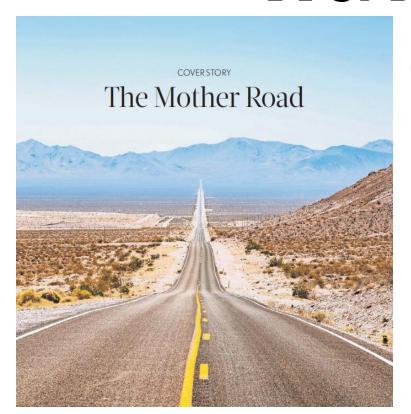
"While we do experience hardships, including the harsh restrictions inflicted on our trans youth last year, what is often missed is the beauty and resilience of the South and its people."



Kymmya Starr Davidson and Carmella Monet Monroe ALAN GRANVILLE / STUFF



# Traveller





As Route 66 prepares for its centenary, now's the time to get your kicks on this not-so-lost highway, writes Katrina Lobley.



oute 66 is a ghost highway. It officially vanished in 1985, but try telling that to the folk of Springfield, Missouri. This Springfield (one of 67 in the US) is dubbed the Buckle of the Bible Belt, thanks to its hundreds of churches. Even while Uber-ing from the airport to my Route 66-themed motel, my driver confesses he glimpsed heaven the previous night as he hunkered down during a minor tornado.

A few years ago, a reporter calculated Springfield has six times as many churches as Chinese restaurants, which is saying something considering many residents are addicted to a local invention called cashew chicken. The city of 180,000 mostly Godfearing people is also the birthplace of another pivotal development – it was from here that a telegram was sent to federal officials on April 30, 1926, suggesting the new diagonal highway connecting Chicago, Illinois, to Santa Monica on the Pacific Coast be christened "66". The designation was approved on November 11, the highway's official birthdate.

Route 66 was born and Springfield, in the Missouri Ozarks, wrote itself into the history books (although Tulsa, Oklahoma, this year claimed the Capital of Route 66 title, as the guy who first noticed the 66 designation was available was a Tulsan). While this part of Middle America might be unfamiliar to many Australians, it's the perfect place to start exploring the nearmythical highway that ran almost 4000 kilometres through eight states. With these states and their retro roadside attractions already gearing up for an influx of visitors in 2026, now's the time to do the route as it was meant to be done: in a leisurely fashion. so you can shoot the breeze with characters you meet along the way.



# **KARRYON**

## 7 reasons why New Orleans should be your next vacay

If variety is the spice of life, then a trip to New Orleans is the flavour we all need to switch things up. With its diverse blend of cultures, rich history, timeless traditions, and delectable cuisine, a trip to New Orleans is the epitome of fun. Viva Holidays agree, which is why they've created <u>new packages</u> to showcase why NOLA (short for New Orleans, Louisiana) should be your next vacay destination.

A trip to New Orleans is about as far from boring as one can get. The opportunity to discover centuries-old stories, connect to long-standing traditions, and explore the city's cultural gumbo – with Spanish, French, African, and Caribbean influences – means there's never a dull moment.

You'll also taste actual gumbo – and NOLA's other celebrated dishes – they make a trip to New Orleans even more memorable. You *will* want to return!

With its distinctive architecture, creative scene, and as the birthplace of jazz, a visit here is lively and fun. Here are seven reasons why a trip to NOLA should be next on your travel wish list:

- 1. Discover: Loud, proud, and offbeat, tap into 300 years of culture across a range of activities.
- Indulge: From traditional dishes to globally inspired flavours, New Orleans creative chefs create food for your taste buds and nourishment for your soul.
- Listen: As the birthplace of jazz, music is as much a part of the culture as Mardi Gras and beignets. Live music – all kinds – enriches street corners, music venues, and the city's worldrenowned festivals.
- 4. Learn: If New Orleans had an affirmation, it would be "I'm enthralling, captivating, and always a good time"! Get inspired at the city's award-winning museums where you can learn about subjects from WWII to the history of Mardi Gras.
- Attend: There's always cause for celebration in NOLA with exciting annual festivals from food, music, culture, and innovation – to align with your visit.
- 6. Experience: New Orleans is not your average city. With tours to historic homes and cemeteries, streetcar rides, and renowned attractions like Vue Orleans observatory, there's always something new to experience.
- Explore: Whether you're getting fresh air on a city park walk, kayaking along a bayou, or checking out a swamp tour, it's great to get outdoors while in town.



7 reasons to visit New Orleans



While it may be the birthplace of jazz, new musicians gets down to all kinds of music here. © Zack Smith



# Courier Mail

## 6 insane Mississippi comfort foods that are not for the calorie conscious

As one Mississippian told me: "I know this is literally killing me but I just can't stop eating the stuff."

Steve Madgwick





Warning: excess consumption of the contents of this story will be hazardous to your health. A fact that won't be disputed, even by restauraunters as they heap hefty servings of Mississippi comfort food onto your plate. As one Mississippian told me: "I know this is literally killing me but I just can't stop eating the stuff."

What makes Mississippi comfort food so good but so bad in the same mouthful? Plenty of animal fat and salt, of course, and the state's penchant for frying the bejesus out of everything. Even those farm-to-table green beans on your plate might not be vegetarian; perhaps 'enhanced with' some 'bacon grease'. Legend has it that some Mississippi restaurants don't even like changing their fryer oil; lest some historical flavour is lost.

Still sound tasty? Here are the best full-fat Mississippi dishes (and restaurants) that'll make y'all blush and wheeze with (short-term) delight. Picture: Bread pudding at the Blue Canoe/Steve Madgwick





## The Post | TE UPOKO O TE IKA

## Fort Sumter: The tiny island that has played one of the biggest roles in world history



June 23, 2024

It is barely a dot at the entrance to the vast Charleston harbour in South Carolina, a small, squat man-made island that covers not quite a hectare.

Yet Fort Sumter has played an oversized role in history as this was the place where the first shots were fired in the US Civil War, a conflict which helped divide and shape the nation.

Back In 1861, President Abraham Lincoln came to power on an antislavery platform, despite much resistance from some of the southern US states. The battle lines were drawn as first South Carolina, and then more states, seceded from the Union to form the Confederate States of America.

Caught in the crossfire was Major Robert Anderson and his small army of 90 men who had moved from a nearby fort to the better-protected Sumter.

Their fort was now the last one still flying the Union flag in the area, and in the early morning hours of April 12, 1861, the Confederate army fired the first mortar shots of the Civil War.

Wildly outnumbered and with a lack of supplies, Anderson and his men held out for as long as they could, but after 34 hours of continuous bombardment, the decision was made to surrender.

Amazingly, no-one had died in the siege. But at a ceremony to celebrate the fort's capture, a gun shell blew up by accident. Two men perished, becoming the first casualties of the conflict. An estimated 700,000 more would eventually die in the four-year war.







## **Communications & PR**

Media Contacts (phone calls, emails, personal meetings

| Contacts                                                                                                                                                                                                                                        | Interest/Status                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | Follow-up/Next step                                                                          |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|
| Stuff NZ, Stephen Heard, Travel<br>Content Director                                                                                                                                                                                             | <ul> <li>Met with Stephen to discuss Stuff's print travel section, which he is in charge of pulling together each week.</li> <li>Very keen for famil opportunities, and will make the most out of a trip with multiple stories across online and print.</li> <li>They have a new focus on video content for online, as they have now taken over the 3 News nightly bulletin (previously run by Newshub who have now closed), and will try to have a video element for all stories when they can. Their journos will capture their own content on famils to accompany stories.</li> <li>He is always looking to fill the 'Travel Insider' column, which is a locals guide to a destination, and their 'In the Spotlight' column which profiles a kiwi 'celeb' on travel. They also have a deals page and a 'What's on' page each week so we can keep him across this news.</li> </ul> | Would love to have someone from the South for their Travel Insider Column. Jake to follow-up |
| TVNZ Lance Hipkins, Commercial Partnerships Director (in charge of partnerships for Seven Sharp, current affairs program that runs after the news) Becky Busche, Commercial Integration Producer (in charge of partnerships for TVNZ Breakfast) | <ul> <li>Met to discuss TVNZ's broadcast programming and opportunities for travel integration. Their viewership has been increasing because of the closure of Newshub, and they are sending across updated figures.</li> <li>Looking mainly for paid opportunities, however, they operate with a small and nimble crew (x3 - host, camera, producer) which means they can do more with less money.</li> <li>Have previously run '5 states in 5 days' and '5 countries in 5 days' integrations with Flight Centre, which would be a good way to show off the breadth of a destination - particularly for Travel South.</li> </ul>                                                                                                                                                                                                                                                     | Worth<br>exploring<br>value of<br>multiple states.                                           |
| Tabs on Travel Today - trade<br>Angela Dominey, News Editor                                                                                                                                                                                     | More of a general discussion, but she mentioned she is<br>slways willing to take spokesperson commentary on NZ<br>visitation to a destination.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       | Make sure she<br>is getting news<br>and what's on                                            |
| Kia Ora<br>Virginia Larson, Editor                                                                                                                                                                                                              | Very keen for famils, preference is for individual but open to group. They pay for their writers' travel if there is no air support. May be in South in November.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    | Jacob to follow-up                                                                           |
| NZME<br>Sandy Kilgour, Commercial<br>Manager Travel                                                                                                                                                                                             | Works quite a lot with airlines, and is keen to put together coop opportunities with airlines and tourism boards - was unsure if these were paid opps or editorial.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | Jacob to<br>follow-up                                                                        |

| Capsule<br>Alice Hampson, Co-Founder and<br>Editorial Director | <ul> <li>Relatively new publication that formed during COVID, as three Editors from Bauer were laid off and wanted to start their own publication.</li> <li>Very female-focused, they are building up their travel vertical as they did research with their audience that shows that (something like) 98% planned to travel in the next year.</li> </ul> | Awaiting their<br>media kit.                   |
|----------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------|
| Katrina Holden, Mark Harada                                    | Coffee catch-up on priorities, upcoming work and their new luxury vertical.                                                                                                                                                                                                                                                                              | Will follow-up<br>depending on<br>opportunity. |
| Concrete Playground                                            | Worked with them on the Travel South content campaign to be held FY24-25                                                                                                                                                                                                                                                                                 | Actvity confirmed.                             |
| Lindy Alexander                                                | Freelancer, writes regularly for escape. Relationship building.                                                                                                                                                                                                                                                                                          | None currently.                                |
| Kristine Talbert, Nine                                         | Coffee and connect, upcoming opportunities. Discussed Global Week.                                                                                                                                                                                                                                                                                       | None<br>Currently.                             |
| Steven Scourfield, The West<br>Australian                      | Was in town from Perth, spoke about the nuances of editorial in that region and upcoming opportunities.                                                                                                                                                                                                                                                  | Follow-up for<br>GMM.                          |
| Emma Babbington                                                | ARE Media. Discussed the best columns across the different outlets.                                                                                                                                                                                                                                                                                      | None<br>Currently.                             |

## III. TRAVEL TRADE

Trade Contacts (phone calls, emails, personal meetings).

| Contacts                                                                                | Interest/Status                                                                                                                                                                     | Follow-up /Next<br>step                                             |
|-----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------|
| Visit USA Mid-Year Event                                                                | Attendance at Visit USA Mid-Year event with a presentation from National Travel and Tourism Office (NTTO) Deputy Director of Research, David Huether. More details in trade update. | N/A                                                                 |
| Christina Peterson Partnership & Marketing Manager Travel Weekly                        | Meeting with Christina and update on Travel Weekly programs and audience base.                                                                                                      | N/A                                                                 |
| Mary-Anne Guest Head of Product Phill Hoffman Travel                                    | Product update on Travel South with resources, road trips and organizing agent training event.                                                                                      | Ongoing                                                             |
| Phil Hoffman Travel<br>Training Event                                                   | Training with Phil Hoffman Travel Staff and presentation on Travel South USA with 60 agents in attendance.                                                                          | Ongoing                                                             |
| Adam Dickson<br>BDM SA/NT/WA<br>Infinity Holiday                                        | Update on Infinity Holidays network in South Australia and training on road trip and city stay destination program.                                                                 | N/A                                                                 |
| Daniel James<br>State Manager SA/NT<br>Express Travel Group                             | Update on Express Travel Group out of South<br>Australia and info on their agent network. Provides<br>assets and info on TS USA to share with network.                              | N/A                                                                 |
| Paul Groundwater<br>BDM SA/WA<br>Hellworld                                              | Training on TS USA product available via Helloworld and Viva platforms.                                                                                                             | N/A                                                                 |
| Home Based Agents Cluster Training Adelaide Event                                       | Home based cluster training with 17 agents in attendance.                                                                                                                           | Emailed through resources to all attendees.                         |
| Highways & Harmonies<br>A Drive Through the Musical<br>Legacies of the South<br>Webinar |                                                                                                                                                                                     | Emailed through resources and content discussed to all registrants. |
| Gate 7 Brand Mixer                                                                      | Brand partnership mixer to look into opportunities to collaborate on promotions.                                                                                                    | Ongoing                                                             |

| Joe Temczuk                                                           | Update on Travel South USA and resources available                                                                                                                                                       | Ongoing |
|-----------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| Learning and Development                                              | for novice training.                                                                                                                                                                                     |         |
| Flight Centre                                                         |                                                                                                                                                                                                          |         |
| Cola Maurirerer<br>Owner Manager                                      | Training on TS USA road trips                                                                                                                                                                            | N/A     |
| Itravel Darwin                                                        |                                                                                                                                                                                                          |         |
| Paul Mural National Product Leader Envoyage Flight Centre Independent | Update on Envoyage brand roll out and FCI system Helio and loading of all Infinity road trip product. Envoyage will eventually move to Infinity, but date yet to be confirmed.                           | Ongoing |
| Ruth Bullock – Product Designer<br>Adam Townsen – Product Manager     | Update on Travel South product and re-release of concierge magazine as a hard product. Information on The Luxury Collection Showcase in feb.                                                             | Ongoing |
| Travel Associates                                                     |                                                                                                                                                                                                          |         |
| Laura Tickett<br>Product Designer                                     | Update and training on Travel South product                                                                                                                                                              | Ongoing |
| Flight Centre                                                         |                                                                                                                                                                                                          |         |
| Clea Harbison – Marketing Manager<br>Neil Crawford – Team Leader      | Update and training on Travel South product                                                                                                                                                              | Ongoing |
| Infinity Holidays                                                     |                                                                                                                                                                                                          |         |
| Tim Holder<br>Global Partnerships Leader                              | Invite to Flight Centre's brand update in late August.<br>Announcement that Global Ball will be in LA in July<br>2025 with sponsorship opportunities available.                                          | N/A     |
| Flight Centre                                                         |                                                                                                                                                                                                          |         |
| Ben Allen<br>Rate Hawke                                               | Update and information on Rate Hawke in the Australian market. Rate Hawke launched (quite unsuccessfully) just before covid but have reinvested in the Australian market with 6 BDMs around the country. | N/A     |
| Joshua Hewett<br>Land Contracting Manager USA,<br>Hawaii & Canada     | Follow up with International Showcase registration and booked flights.                                                                                                                                   | Ongoing |
| Helloworld                                                            |                                                                                                                                                                                                          |         |
| Melissah Missio<br>Groups Manager                                     | Follow up with International Showcase registration and booked flights.                                                                                                                                   | Ongoing |
| Chris Watson Travel                                                   |                                                                                                                                                                                                          |         |
|                                                                       | Follow up with Kevin & Nic to ensure Infinity has registered for International Showcase. This has now been completed, but they are still working out who                                                 | Ongoing |
|                                                                       | from Infinity Holidays will be attending.                                                                                                                                                                |         |

| •                                                          | Follow up with Andrew to ensure he has registered for International Showcase.                                                                                                                                                         | Ongoing |
|------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|
| TravelUSA.co.nz                                            |                                                                                                                                                                                                                                       |         |
|                                                            | Follow up with International Showcase, but unfortunately Louise can no longer attend as they are very short staffed.                                                                                                                  | N/A     |
|                                                            | Follow up with Cassie from Karryon regarding attendance at International Showcase. Flights have been booked and story angles followed up by Jacob.                                                                                    | Ongoing |
|                                                            | Support and training for client itinerary through Mississippi and Louisiana.                                                                                                                                                          | N/A     |
| Corrine Mutz<br>Personal Travel Manager<br>Travel Managers | Support and training for client itinerary                                                                                                                                                                                             | N/A     |
| Managing Director & Group CEO                              | Info on Travel South for new 13 day Southern Music and Mayhem itinerary in April 2025. TS USA will be supporting his agent launch with a stand and lucky door prizes.                                                                 | Ongoing |
|                                                            | Support and training around client itinerary to Kentucky, Tennessee, Mississippi and Louisiana.                                                                                                                                       | N/A     |
| Sales & Product Manager                                    | Invitation to Travel South International Showcase as Entire are planning to expand into US product. She explained it was a little early for the South as their first step is North Eastern product to add onto their Canadian program | Ongoing |
| Rose Febo<br>Personal Travel Manager<br>Travel Managers    | Support and training for client itinerary                                                                                                                                                                                             | N/A     |

## Campaigns & Activity

Helloworld Training









#### ■ Liberty Tours – Music and Mayhem Itinerary





Show Favourites 💙

#### Southern Music and Mayhem USA

#### Package

Explore the extensive collections and historic recording studio where legendary artists recorded hits.

Visit the iconic studio where blues and rock 'n' roll artists first recorded, and explore the museum with over 2,000 interactive exhibits.

Tour the last home of Elvis Presley, now a museum, and the new State-of-the-Art Visitor Entertainment Complex.

Experience blues performances, arts & crafts, Southern food, and unique events like monkeys riding dogs and racing pigs.

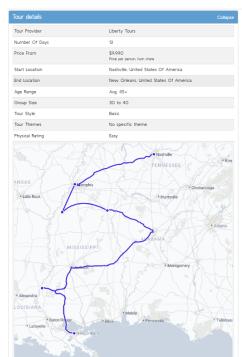
Tour the two-room house where Elvis was born and other significant sites of his childhood.

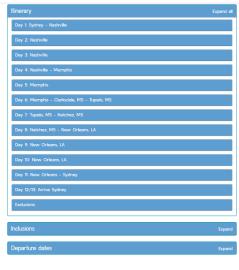
Tour of the historic town with entrance to an antebellum mansion.

Guided city tour covering the Garden District, French Market, Saint Louis Cathedral, and the Cabildo.

Jazz Dinner Cruise on the Natchez Steamboat, enjoying a buffet dinner and entertainment by the Dukes of Dixieland Jazz trio.

Thrilling airboat tour through the marshland and bayous, exploring Louisiana's back country with exotic plants and wildlife.







#### ■ Visit USA - Mid-Year Market Review Data Presentation









#### Qantas Hotels Brand USA Campaign



With over 80,000 hotels to choose from, discover the vast and varied landscapes of the USA. From exploring the celebrity-studded ovenues of Los Angeles to the deep musical roots of Nashville, or wandering through historic Boston streets to soaking up the sun in Miami - planning your trip is easier than ever.

Experience it all in the USA with Qantas Hotels.

#### **New Orleans**

New Orleans entices with its vibrant mix of music, cuisine, and history, making it a city like no other. Experience the birthplace of jazz, savour Creole flavours, and wander through neighbourhoods brimming with lively streetcars and Spanish oak trees.







Four Points By Sheraton French Quarter New Orleans 3 nights for two adults

From \$853

View Offer →

Wyndham New Orleans - French

Quarter New Orleans

3 nights for two adults

From \$920

View Offer →

AC Hotel by Marriott New Orleans

French Quarter New Orleans

3 nights for two adults

From \$1,155

View Offer →

EXPLORE MORE NEW ORLEANS HOTELS

#### Nashville

Nashville, renowned for its legendary music scene, offers a mix of cultural and culinary experiences. Beyond iconic venues like the Grand Ole Opry and Ryman Auditorium, the city showcases a vibrant arts scene, including the National Museum of African American Music.







Placemakr Music Row

Nashvill

2 nights for two adults

From \$578

View Offer →

Bobby Hotel Nashville

3 nights for two adults

From \$3,633

View Offers →

The Capitol Hotel Downtown, Ascend

**Hotel Collection** 

Nashville

3 nights for two adults

From \$1,174

View Offers →

EXPLORE MORE NASHVILLE HOTELS

EXPLORE > NORTH AMERICA > UNITED STATES

#### 15 of the Coolest Places to Visit in the USA Right Now

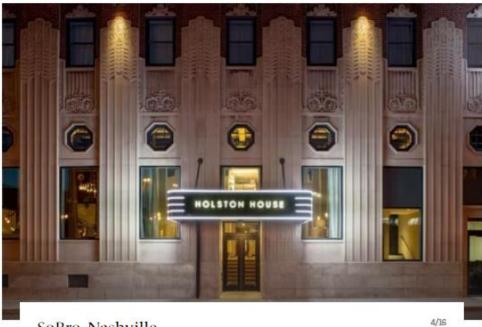
Watch stand-up comedy in Central Park, drink cocktails in a historic New Orleans library and take in waterfront views as you sample Modern Mexican cuisine in San Diego. Discover some of the best places to visit and things to do in the USA with our expert guide.



Marigny and Warehouse District, New Orleans

Officially called "Faubourg Marigny", this New Orleans neighbourhood sandwiched between the French Quarter and Bywater teems with jazz clubs (such as Malson) and vibrant watering holes, including The Elystan Bar. Get your literary fix at Baldwin & Co., a bookstore that pays homage to author James Baldwin, then head over to Bourbon Street in the heart of the city for the giant street party that is Mardi Gras, which happens in February or March each year (dates depend on when Easter falls).

South from Bourbon Street along Carondelet Street is the palm-fringed Matson de la Laz, an elegant 67-room hotel that fuses old-world romanticism with modern luxury in the artsy Warehouse District. Linger at the signature Bar Marilou, which can be accessed via a guest-only entrance. Housed in City Hall's historic library and still filled with books, this cocktail bar serves lively spirits and a small plate menu seasoned with French, New Orleans and West Indies-inspired flavours.



SoBro, Nashville

Less than a 10-minute drive from Nashville atrport, SoBro (short for "South of Broadway") is a neighbourhood brimming with great restaurants and drinking spots. Pop into Stnatra Bar & Lounge, which pays homage to the singer with hearty Italian dishes such as ragu pappardelle and braciole, then continue your adventure through music history at the Country Music Hall of Fame and Museum's Patty Loveless exhibit.

Holston House Nashville, a 10-minute walk from the Hall of Fame, is a pet-friendly, Art Deco-style hotel that's big on soulful atmosphere and southern hospitality. Grab brunch and bottomiess Mimosas at Tenn restaurant, which specialises in local favourities, including fried chicken, pimento cheese and hot honey. Come evening, relax at the rooftop poolside bar with a Banana Colada, a blend of banana-infused whisky with pineapple and coconut. Highways and Harmonies Webinar Invite



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A DRIVE THROUGH THE MUSICAL LEGACIES OF THE SOUTH





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You'll also have a chance to win a \$100 Gift Card on the day!

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Microsoft Teams

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#### ■ Highways and Harmonies Webinar







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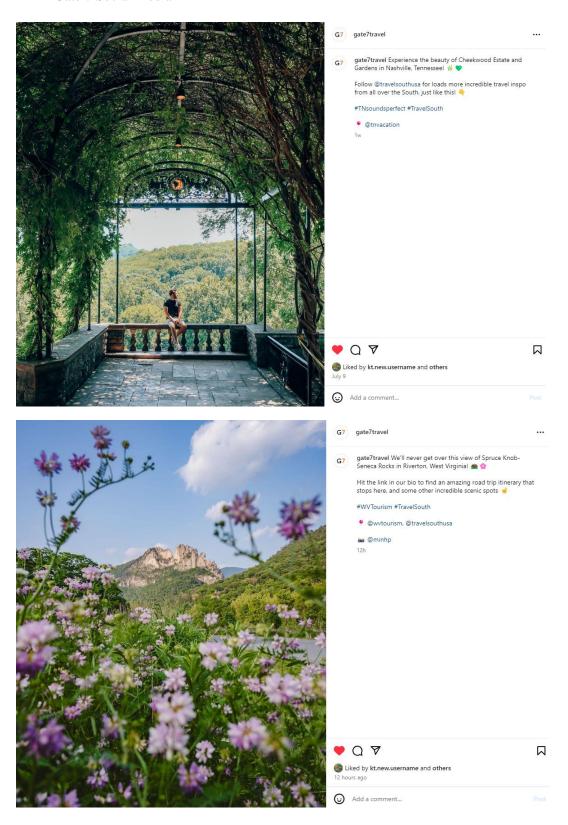
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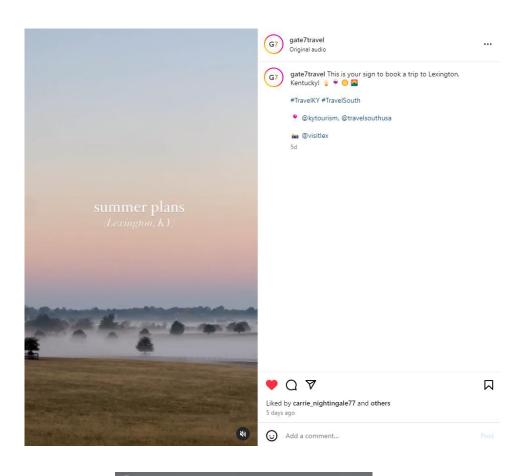






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## IV. Market Update

#### **Economic & Market Update**

- The unemployment rate rose by less than 0.1 percentage point to 4.1 per cent in June, raising fears the Reserve Bank could lift interest rates if inflation figures, due out on July 31, are high. Source.
- Consumer confidence hit a six-month high thanks to the Governments stage 3 tax cuts that came into effect in July. A person with a taxable income of \$100,000 will be \$2,180 better off because of the Stage 3 tax cuts. Source.
- International airfares fell by 13 per cent in Australia in the first six months of this year, and they are still falling. Source.
- The Reserve Bank of Australia does not meet in July, so the cash rate remained unchanged at 4.35%, they are set to meet again Tuesday August 6.
- The latest arrival figures released report 95,776 Australian visitors to the USA in May, up 4% on 2023, and reaching 76% of 2019 levels. Australia was the 10th largest long-haul market into the USA for the month of June and YTD (Source i94 arrivals).
- In terms of visitation from New Zealand to the USA, in June there were 24,041 visitors, down 7% on June last year.
- 4,005 Australians listed a Travel South state as their first intended address in June, equaling 4% of total USA visitation, and up 6% on last year. (Source i94 arrivals first intended address).
- The AUD against the USD peaked at US\$0.68 in the middle of the month but pulled back to \$0.65 by the end of July.

#### **Tour Operators & Travel Agencies**

- Independence Day proved an ideal occasion for the team from Visit USA to host its mid-year market review in the company of industry leaders and partners. The event, presented the latest travel data for the Australia market directly from National Travel and Tourism Office (NTTO) Deputy Director of Research, David Huether. It was particularly special as it also marked the first time the NTTO had presented to any USA tourism promotional body located outside the country itself. Growth in travel to the USA from Australia is projected to rise 23.7% compared to the 954,000 that made the trip in 2023. The data shows Australia is the 10th most valuable source market for the USA by volume but holds fourth place among the fastest growing international markets. More than 90% of travellers head to the USA on a leisure holiday, with 80% being repeat travellers and spending an average of 17 nights state-side. Los Angeles is the leading point of entry to the US, accounting for 37% of Australians entering, followed by Honolulu with 16% and San Francisco with 12%. New York and Dallas both catered for 6% each, with Houston on the list with 2% Source
- The Commonwealth Bank has announced a new travel booking service has been added to its app, allowing customers to search, book and pay for flights and hotels for the first time. Powered by OTA Hopper, the new feature has been introduced following CommBank research that found travel is the most popular type of savings goal its customers set. Among the advantages offered includes a sophisticated airline price prediction feature, which notifies users of the best time to book the cheapest flights. The latest CommBank iQ Cost of Living Insights Report showed an uptick in expenditure on travel experiences, with spending rising by 4% in the past year, boosted by a 16% annual lift in spending on online travel bookings. The new feature can be accessed via the app by searching 'Travel Booking' in the search bar, or by visiting commbank.com.au/ travelbooking, and is available to all users 18 years or older. Source

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- Leading independent travel network Envoyage has today announced the signing of its first-ever shopfronts, marking a significant milestone in rolling out its new consumer-facing brand. After Envoyage launched to the Australian industry in May, the development signals its commitment to expanding its reach within the travel industry and broadening its offering to its advisors and agencies. Source
- Eighteen global brands operating under The Travel Corporation, including Trafalgar, Contiki, Insight Vacations, Adventure World, Uniworld Boutique River Cruises and more are now in the hands of US private equity firm Apollo following a definitive agreement to acquire TTC.

  Source
- Helloworld will team up with the Canadian-based, member-owned Ensemble boutique travel agency consortium in an exclusive alliance and tap into its global luxury hotel program, allowing network access across its brands in Australia and New Zealand. Helloworld Travel announces the new strategic partnership in a deal it believes will help its members maximise profits especially across luxury hotel bookings. Under the deal, all agents in Helloworld's Branded, Associate, Magellan, Helloworld Business Travel, Alatus, My Travel, MTA, Express Travel and First Travel Group divisions in Australia and New Zealand will benefit from Ensemble's ADX booking platform from 01 August. The Ensemble hotel program offers sellers exclusive benefits and competitive rates at a range of luxury properties globally, while the agreement will also provide a link to reputable destination management companies around the world. Source
- 1000 Mile Travel Group (1000MTG) is providing independent travel agencies with the option of joining its network, whilst still maintaining their own unique brand identity. The decision to launch a new self-branded model for travel businesses arrives after "years of research", 1000MTG said, offering agencies the chance to leverage its global support services, resources, and partnerships. There are a few caveats for applicants seeking to join the new model, including a requirement to have a minimum of two members in the agency at any time, as well as the need to operate a non-corporate niche, where the corporate technology offering remains under the fully branded 1000MTG model. Source
- Flight Centre refines TTV and profit expectation for FY24 expecting 130% growth on prior year result. Flight Centre Travel Group has just lodged a revised profit guidance for the 2024 fiscal year, in which it expects Profit Before Tax (PBT) to sit between \$316 million and \$324 million due to internal restructuring costs. The company said the forecast result would still be between 1.3% and 1.4% of Total Transaction Value of around \$23.7 billion, but would be a slight downgrade from earlier projections of around \$340 million, blamed largely on "significant airfare deflation" during the year. Source
- Link Travel Group has declared Jul 2024 as a "historic month" for the invitation-only luxury and corporate travel group, with 10 new members joining. The collective's General Manager, Scott Darlow, visited all five states and all 10 new members personally to welcome them into the fold. Newcomers include Solve Travel Management; Maxim's Travel; Atour Travel Service; Y Travel; Angas Travel; WeExplored; Travel Focus Group; Aus World Travel; Gregor & Lewis Bespoke Travel; and Lexus Travel. The huge expansion comes as the travel group marks its second birthday this month. Source
- Corporate Travel Management (CTM) has made the decision to rebrand its meetings and events division ETM to CTM Meetings & Events. The major corporate travel business said the "strategic move" will enable it to better meet growing demand for corporate events in a way that will be a more seamless extension of its corporate travel program. Source
- Travellers are increasingly booking business class for international trips, with Flight Centre data showing a 6% increase in the premium cabin. Corporate travellers led the way with FCTG brands FCM Travel and Corporate Traveller showing a 14% jump in business class sales. Europe and North America were the most commonly booked destinations to fly at the pointy end, with bookings both up 9%. Source

#### **Traveler Insights**

- Close to half of Australian travellers believe the wide range of product choice in the market is making it too difficult to know where to start planning a trip. The insight was contained in a new report compiled by The Growth Distillery, Ogilvy and Kantar, which also found that 43% of Aussies see the abundance of brand information as hampering the decision-making process. Travellers also stated in the Influence Codes study they were frustrated by the "generic" way in which many travel brands are currently presented, with the report contending there is an opportunity for brands to offer more personalised and tailored travel options to secure bookings. Two-thirds of Aussies said they needed travel experiences to resonate on a more personal level than is presently available, while experiences and reliability were also listed as the most effective ways to influence sales decisions. Source
- One in five Australians will get themselves into debt to book their next holiday, the latest research from Compare the Market has revealed. The travel insurance comparison site found that 19.1% of Aussie travellers will use a credit card, personal loan or buy-now-pay later schemes to fund their upcoming getaways. Gen X were the most likely to go into the red, with 21.3% admitting they'd rack up debt for a holiday, followed closely by 21.1% of Baby Boomers. The youngest age group, Gen Z, are more money-mindful when it comes to holiday planning, with 70.7% saying they intend to save all the money in advance and pay in full at the time of booking. Of the 1,010 Aussies who were surveyed in Mar, 14% are opting to save their pennies instead of booking a trip. Source
- Bleisure travel is continuing to gain traction among business travellers, with one in two planning to add leisure time to their work trip this year. According to a new report from talent sourcing company Howdy, which surveyed more than 1,000 full-time employees in the US, the majority (68%) of those partaking in the bleisure trend are Gen Z, followed by Baby Boomers (63%). Most respondents (64%) believe bleisure offers better work-life balance, with 19% say a bleisure trip, in which work covers airfares and accommodation, is the only way to afford a vacation Source
- Fresh insights from the Council of Australian Tour Operators (CATO) has shown a mixed recovery in international leisure travel from Australia in 2023. Around 11.3 million Aussies travelled overseas during the first full calendar year of travel post-pandemic, representing a drop of 12% compared to 2019, according to the industry body's 2023 Australians on Holiday: International Leisure Travel Trends report. Aussies spent a collective \$50 billion on international leisure travel, lagging behind 2019 figures by 22%, and holidayed for an average of 17.7 days down 8% on the pre-COVID average. Land-based multi-day tours were a popular choice among Aussies however, generating an expenditure of \$4.4 billion, fuelled by traditional coach tours, which alone captured a \$2.1 billion spend. There were some notable shifts when it came to destination choices, with South Korea and Fiji both seeing significant jumps compared to 2019, up 57.5% and 16.6% respectively, while travel to the USA was down. However, the US has shown plenty of green shoots this year. "These findings highlight a vibrant rebound in international travel, echoing trends seen in 2019, and demonstrate Australians' enduring enthusiasm for global exploration," CATO said Source
- New international research has highlighted how overwhelmed travellers feel when making holiday bookings, due to a proliferation of increasingly complex offers, according to Travelport's first annual State of Modern Retailing Report. The Travelport study found booking travel directly from providers has become more time-consuming and complicated than ever. More than half (58%) of travellers feel overwhelmed by too many choices, the report revealed, with almost the same amount (56%) stating that airline offers in particular are more difficult to understand than they were 10 years ago. Almost two-thirds of travellers (71%) feel anxious about whether they have received the best deal after they've booked their trip, while almost nine in 10 people would prefer all flight options and fares appear on one screen. Travelport estimates air travel options have gone from about 500 in 2010 to more than 10,000 this year. Source

- Australians are having to save 35% more in their travel budgets to cater for rising inflation and cost of living. The finding was contained in a new report from Insure&Go's parent Europ Assistance, which found the travel budget increase of roughly a third had occurred over the last 12 months. More than 1,000 Australians took part in the study of 21 countries, with the report suggesting the average Aussie travel budget had grown to \$6,145 from \$4,548 in 2023. Australian travellers were also found to be forking out 55% more than their European counterparts, and 15% more than the budgets of North Americans. While the figures are an encouraging sign that Aussies are prepared to keep spending a healthy portion of the household budget on travel, the report was not as optimistic for accommodation providers. Close to 60% of Aussies indicated they will seek out cheaper accommodation to make their budgets stretch further, while just over half also suggested they would cut down on food and activity spend. Further budget concessions were confirmed for transport, with 55% of Australians stating they will take cheaper options where available. Four in 10 Aussies also revealed they will select a destination closer to home to ease the travel budget, and a similar percentage will reduce their trip duration to make ends meet. While budgets are the biggest indicator of destination choice, other factors filtering into the decision-making process include leisure or cultural activities (51%), the weather (37%), and the quality of onsite tourist infrastructure (34%) Source
- Australians are cutting back on luxuries while travelling due to affordability concerns, a new report from Finder shows. The survey of 1,012 respondents revealed more than one in two people (54%) say the rising cost of living is having a negative impact on their lifestyle, leading one in four (25%) to stop staying at five-star hotels. Additionally, 16% said they've downgraded travel and can no longer afford to fly first or business class, while 33% indicated they've stopped eating at high-end restaurants. Younger age groups Gen Z (69%) and Gen Y (66%) were more likely to say they've made sacrifices to cope with financial pressures, compared to Gen X (48%) and Baby Boomers (36%) Source

#### Air Lift

- American Airlines is set to receive 100 hydrogen-electric engines to power its regional jet aircraft, resulting in close to zero inflight emissions. The carrier signed a conditional purchase agreement with clean aviation innovator ZeroAvia, which is flight-testing a prototype for a 20-seat plane. ZeroAvia is also currently designing an engine for larger aircraft such as the Bombardier CRJ700, which AA operates on certain regional routes. Source
- Qantas has joined an alliance of airlines, an aircraft manufacturer, and energy and financing companies to accelerate the global production of sustainable aviation fuel (SAF). The partners have committed around US\$200 million, including US\$50 million from Qantas, to fund SAF technology development and production projects. Source
- American Airlines has conceded its previous distribution strategy which cut travel agents out of the sales chain cost the carrier any chance of hitting profit expectations for the Q2 of the financial year. Speaking at a financial update delivered overnight, AA CEO Robert Isom said despite a growing fleet and network, the airline did not meet preliminary forecasts for the quarter. "We are taking the challenge [of changing the distribution strategy] head-on, with clear and decisive actions to deliver on a strategy that maximises our revenue and profitability, and importantly, one that makes it easy for customers to do business with American," Isom said. "I'll just be frank, we overindexed on directs and we've got to find a way to play in the richer pool of indirect revenue and that starts with having content, having positive relationships with travel management companies and agencies," he added. Profits dropped by 46% for the quarter to US\$717 million. The carrier backed away from its aggressive approach targeting direct bookings in May (TD 31 May), notably by removing its cheapest fares from GDS platforms and scrapping loyalty mileage accrual on tickets booked through travel agencies. Source
- Fiji Airways highlighted the airline's successful year, with its network seat capacity growing by an impressive 47% over the last financial year. Since launching the CBR-NAN route in Jul last year FJ the airline has flown 22,000 passengers between the destinations, and increased frequency from twice to three times per week. One of only two airlines flying internationally from Canberra, the flight to Fiji Airways' Nadi hub allows further connections to the 108 destinations over 15 countries serviced by the airline including their newly announced DFW route. Source

#### V. **Actions**

#### **Liberty Tours Wholesale Launch**

Attendance and presentation at Liberty Tours agent launch

## Flight Centre Brand Update Flight Centre head office presentation and networking function

#### Media Follow Ups & Meetings

- Follow-up actions from New Zealand meetings
- Finalize details of Concrete Playground partnership