



# GATE 7

## 2025 Tourism Development Plan

### Australian Destination Representation

Director of Tourism Development

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Australia

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2025

# Strategic Plan



## **DEDICATED AUSTRALIAN & NEW ZEALAND TEAM**

**GATE 7**



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## Director of Tourism Development – Penny Brand

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### Experience

Penny Brand isn't just the Director of Tourism Development at Gate 7; she is the living embodiment of expertise in the world of tourism. Her journey in the sector began in 1998 as a European Tour guide with Contiki, and over the past 25 years, Penny has become an industry stalwart with a wealth of experience across various segments.

With a track record that speaks volumes and an infectious passion that knows no bounds, Penny continues to shape the tourism landscape, retaining her reputation as the foremost industry expert and go-to source for all things travel at Gate 7.

Penny's diverse background includes roles in guiding, hotel sales and marketing, and even throwing people out of airplanes. Returning to Gate 7 in 2015 after an 11-year exploration of other industry segments, Penny has proven herself to be an invaluable asset to the team. As the Director of Tourism Development, she leads and guides her team with unparalleled expertise, ensuring that Gate 7 remains at the forefront of the tourism industry.

Penny's strengths are numerous and varied, ranging from product development and distribution to training and engagement within the travel trade. Her skill set extends to executing integrated conversion lead campaigns, showcasing her strategic calibre in driving tourism initiatives.

Beyond her official role, Penny's commitment to the industry goes beyond the office, making her the ultimate insider for anything travel-related. Whether it's mastering the art of maximizing Qantas points or staying informed on the latest flight routes, Penny's industry knowledge is unmatched.

In 2023, Penny received well-deserved recognition for her outstanding contributions, being honoured with the prestigious title of 'Travel South USA Global Partner of the Year', an accolade solidifying her status as a true leader and expert in the industry.



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## Director of Public Relations – Jacob Annesley

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### Experience

Jacob Annesley brings over a decade of invaluable expertise to Gate 7 as Director of Public Relations & Content. With a robust background in earned media and integrated campaigns for industry leaders, Jacob is the driving force behind the elevation of Gate 7's narrative and brand positioning.

In his role, Jacob oversees all public relations and content creation activities at Gate 7, demonstrating his commitment to drive innovative storytelling and effective brand promotion. Leading and guiding the PR Account Team, Jacob infuses his strategic vision and leadership to amplify the agency's impact.

Annesley brings extensive expertise to the Gate 7 team, having previously spearheaded successful communications strategy and creative campaigns for a diverse range of industry-leading brands and clients such as Xbox Asia Pacific, Destination NSW, Audible, Snapchat, and Netflix at Ogilvy PR, alongside his work on projects and new business pitches. His previous experience also includes global video game developer Ubisoft and Mushroom Group, Australia's and New Zealand's largest independent music and entertainment group. His expertise in crafting compelling narratives and integrated campaigns will play a crucial role in connecting travellers with the unique experiences offered by the destinations Gate 7 represents.

Jacob campaign work has been nominated at both the Mumbrella Commscon Awards and PR Sabre Awards and his expertise in crafting compelling narratives and integrated campaigns will play a crucial role in connecting travellers with the unique experiences offered by the destinations Gate 7 represents.





# STRATEGIC FRAMEWORK MARKET CONSIDERATIONS



GATE 7

# The Economy

Australian economy remains in 'relatively good shape' in 2024, despite a year of rising interest rates and stubborn inflation.

Growth in the Australian economy is expected to remain below trend over 2024 as cost-of-living pressures and higher interest rates continue to weigh on demand. But the economy has proved to be more resilient in recent quarters than previously expected

In 2023 to combat rising inflation that peaked in December 2022 at 7.8%, the Reserve Bank of Australia continued to raise the cash rate another five times resulting in a steep climb from 3.35% to 4.35%. It is assumed the cash rate will peak at 4.5% this year before declining to around 3.5% in the second half of 2024, in line with inflation which is forecasted to decline to 3.5% by years end.

Average Australians have felt the cost-of-living pressure of 2023's year of rising interest rates, dwelling costs, fuel, and food, and as such the government has just released a revised tax cut scheme that will save the federal budget almost \$28 billion over the next decade, draw more women into the workforce, whilst delivering an average tax cut of almost \$2000 a year to millions of Australians.

It's also important to note, that despite recent cost-of-living pressures, Australia remains an affluent country who prioritize travel in discretionary spending. More than 2.09 million households have an income >\$100k

- > GDP Annual Growth rate: 1.10% ↓
- > Interest Rate: 4.35% →
- > Inflation Rate: 3.60% ↓
- > Unemployment Rate: 4.00% ↑
- > AUD/USD: ~67c →

# The Travel Trade

## Record profits and a booming travel industry

After a year of record profits from across the industry the travel industry is well and truly recovered in Australia.

Luxury is booming and everyone wants a piece of the action. There has been significant growth across the luxury market including more agents joining Virtuoso, and the Signature travel network, as well as existing agency groups launching their own luxury brands, like independent retail network ittravel introducing LUXE by ittravel.

Vertical integration is also a continued focus with Qantas's purchase of Trip-a-deal and Australian OTA Luxury Escapes introducing a B2B wholesale model.

Travel Agents remain in high demand, continuing to charge for services with tailor-made bespoke itineraries highly sort after.



# TRAVEL TRADE

## CONSOLIDATED GROWTH



### From Rebuild to Growth, Agents Continue to Dominate.

Trade has been crucial for the travel industry's recovery. Brick-and-mortar agencies, as well as independent mobile agency groups continue to report record profits.



### Two Clear Groups of Agents Experienced & Novice.

The divide between two clear travel agent groups will continue in the coming year, as a result, we must tailor our training to meet the needs of both groups. Starting with our experienced agents with a well-established customer base, they remain time poor but are motivated to deliver, and continue to confidently charge for their services by moving to paid appointments. Next is the growing cohort of novice travel agents. It's estimated 100 new recruits are joining the industry each month. For most this is their first professional job, so we need to tailor our training accordingly.



**Experienced with a well-established customer base**  
Time poor but with established client relationships, this group is motivated to deliver.



**Novices**  
They are not only new to travel but in fact it's their first job

# TRAVEL TRADE

## CONSOLIDATED GROWTH



### Reshaping of Product Distribution

Australian wholesalers are still challenged with loading product at the rate at which retailers demand, largely because of the recent technological investments and API connections required for dynamic pricing. Most products and experiences are now available to travel agents through online bed banks, but there's confusion and a growing need to simplify/surface product. Retail groups are increasingly building out their own buying groups for their preferred product with wholesalers investing in more reservations staff to support complex itinerary building, especially for novice agents. Bundling and packaging are increasing in popularity, and we're seeing a growing demand for agency groups to secure bespoke one-of-a-kind experiences for their clients.

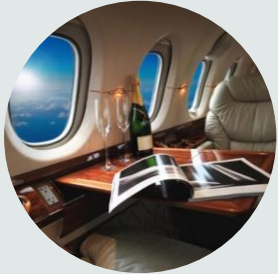


### Digital Disruption

Innovation is being driven by digital transformation, which has opened a growing number of platforms for distribution, bringing together APIs from many sources. For example, 2023 start-up [Zoku](#) Travel, an OTA linking Influencer travel to bookable products, is live and expanding fast with plans in 2024 to grow their USA product. [Zoku have launched their first DMO partnership in 2024](#) with Los Angeles Tourism & Convention Board. The difference between Zoku and a standard affiliate model is the commercial incentive on the influencer to sell, as well as their role to curate product directly on Zoku's website. Another example is leading millennial publication [Concrete Playground](#), launching their OTA [Concrete Playground Trips](#), starting with close to home holidays with the view to launch longer haul trips in 2024 starting with the USA.

# TRAVEL TRADE

## CONSOLIDATED GROWTH



### Luxury & independent tour operators are thriving

Australian Gen X and Boomers, having amassed significant wealth from property ownership and compulsory superannuation contributions, are attracting travel brands that seek to cater to their affluent travel preferences. OTA Luxury Escapes introduced the Ultra Lux platform on its website to cater to those seeking an elevated level of luxury. Travel Managers, an independent agency network, joined the Signature Travel Network, making Australia the second-largest market for the network after the US. iTravel, an independent travel group, launched their luxury brand called "Lux by iTravel," and Flight Centre acquired the rights to the luxury travel expo Luxperience. Additionally, Flight Centre boasts the largest network of Virtuoso agents under their luxury retail brand, Travel Associates.

To capitalise this booming luxury demand across the trade, Karryon, Australia's leading industry news source, launched Karryon Luxury in April, along with a luxury advisory board featuring eight members from luxury brands including Savenio, Luxury & Independent Brands, Flight Centre Travel Group, TravelManagers, Lux by itravel, MTA, Virtuoso, Link Travel Group, and Helloworld.



### Defining luxury in Australia: The new luxury

Luxury travel from Australia is on the rise, and post-COVID, the concept of luxury has evolved. Traditional notions of opulence are being replaced by a new era defined by exploration, immersion, connection, exclusivity, and accessibility.

According to Luxury Traveller, "Luxury isn't just about the dollar bills or the number of stars your hotel has anymore. It's about diving headfirst into the unknown, immersing yourself in experiences that make you do a happy dance, and connecting with the world in ways you never thought possible. It's about cultural kudos, finding space, treading lightly, and giving back."

# TRAVEL TRADE

## CONSOLIDATED GROWTH



### 'Bleisure'

Australian corporate travelers are leading the trend in combining business and leisure travel, known as "bleisure" trips. On average, Australian professionals spend six nights away on business trips, compared to the global average of 3.5 nights. Data from Corporate Traveler shows a 5% increase in the average length of stays for Australian SMEs in 2024, indicating a strong preference for integrating work and personal travel.

Additionally, the Global Business Travel Association reports that 62% of travelers worldwide are blending business and leisure more than in 2019, with 79% staying at the same accommodation for both purposes.

Australia ranks amongst the top 15 markets for business travel spending with USD\$23.5M spent in 2023 (up 27% YOY), and with global business travel industry spend set to reach USD\$1.4 trillion in 2024 and USD\$1.8 trillion by 2027, Australia represents an important market for 'bleisure' opportunities. [Source](#).



### Vertical integration

The most significant move comes from Qantas, who ended their commercial agreement with Luxury Escapes (whose customers could earn and use Qantas frequent flyer points to book travel on their site), and instead expanded their product offering with the 2023 launch of their OTA Qantas Holidays and owned package specialist Trip-A-Deal, with plans to offer customers the ability to book multi-stay itineraries. They have also launched a sub brand, Qantas 'Luxury' Holidays, to target the booming luxury market. It is important to note that Qantas remains Australia's largest travel brand with a customer loyalty program tapping into 14M Australians, equaling 50% of households.

Making headlines in 2024, Australian OTA Luxury Escapes is set to launch an Agency Distribution platform in March that will allow travel agents to earn commission on the world's best luxury travel deals. A brand known in the Australian market to focus solely on B2C has shocked the industry with this announcement to expand its service offering by building out a B2B wholesale platform for travel agents.



# TRAVEL TRADE

## CONSOLIDATED GROWTH

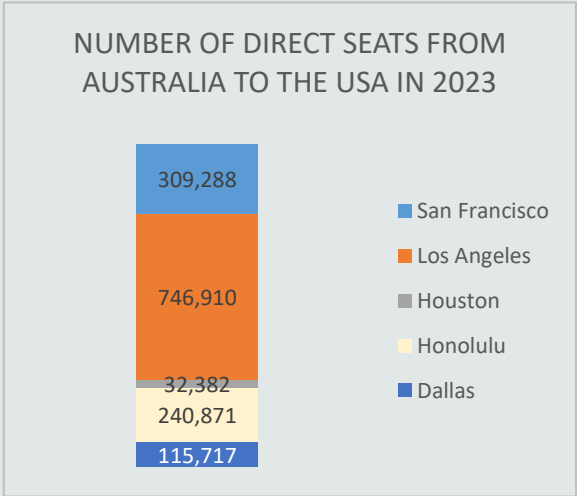


### Airlift Continues to Build

Airlift continues to build in 2024, especially with new routes announced out of Brisbane, with both Delta (into LAX) and American Airlines (into DFW) launching inaugural seasonal flights starting in Oct 24. Thankfully, these new routes and increased capacity have been driving fare prices down. And for the month of December airlift had grown so much available seats were sitting at 94% of pre-pandemic levels.

LAX remains the dominate gateway to the rest of the USA but increased direct routes to New York from Australia via New Zealand will threaten this market share. Both Air New Zealand and Qantas are flying direct Sydney > Auckland > JFK. Qantas has also confirmed an order for 12 Airbus A350-1000s to conquer the final frontier of long-haul travel and enable non-stop flights to Australia from New York from late 2025.

Looking ahead in 2024, airlift recovery will remain a priority with increased capacity driving continued and welcomed fare sales.



NUMBER OF DIRECT SEATS TO USA FROM AUSTRALIA		
	JANUARY + FEBRUARY 2024	% CHANGE YOY
Dallas	19,495	Up 28%
Honolulu	40,761	Flat
Houston	14,906	Flat
Los Angeles	150,240	Up 23%
San Francisco	81,797	Up 62%



# Media

## Disruption, UGC and the Rising Importance of Trust

Demand for travel content is back in force while the media continues to evolve to meet technological and societal changes.

With the rise of misinformation through social media, there's an appetite for trusted brands, increasing the value in mastheads and credible media titles. Following robust discourse on paywalls and news' place in the social algorithm, the number of people paying for online news continues to grow, placing Australia among the top countries globally.

Now the world is open, freelancer competition and power among on-staff writers is as rife as ever, with freelancers diversifying their title remit to keep afloat.

Media is adopting new technologies to better connect with and deepen their audience relationships and drive subscriptions. As true UGC has come to the forefront like never before, we are seeing the rise of new micro-influencers, video-first, and niche channels.

# MEDIA

## HOW AUSTRALIANS ARE SPENDING THEIR TIME

### TIME SPENT USING THE INTERNET



6H 14M

### TIME SPENT READING ONLINE & PHYSICAL PRESS



1H 05M

### TIME SPENT USING SOCIAL MEDIA



1H 51M

### TIME SPENT WATCHING FTA & STREAMING



3H 17M

### TIME SPENT LISTENING TO PODCASTS



0H 42M

### TIME SPENT LISTENING TO RADIO



1H 01M

# MEDIA

## CHANNEL TRENDS

Australians' demand for credible news, booming podcast listenership, and changing consumption habits highlight key opportunities for publishers to deliver high-quality content across multiple platforms.



### News: Credibility Matters

- 19 million people consume news each week; that's 9 out of 10 Australians aged 14+
- The number of people paying for online news continues to grow, placing Australia among the top countries globally. One in five Australians will go beyond the paywall those who already pay are increasing the number of their subscriptions.
- Australians' desire for high quality and trustworthy news while they struggle with the overwhelming volume of information and misinformation has been listed as a top motivator for subscriptions.



### Podcasts: A fresh opportunity

- Podcasts boomed during the pandemic. By 2021, the percentage of podcast listeners had risen to 26%. And, in 2023, we see an even more impressive figure of 33% of the population, which translates to approximately 7 million people, listening to podcasts on a weekly basis.
- This growth rate is forecasted to continue throughout this year, creating a growing opportunity for long-form destination storytelling and executive interviews.



### Social: Gateway to news

- 82.2% (21.45M) of the population are active on social media
- The use of Instagram (26%, +6) and TikTok (17%, +4) for consumption of news and editorial continues to rise among Gen Z.
- 1 in 5 aged 16-64 follow influencers/experts online
- The Federal Government and Meta are in the midst of negotiations for fair payment for publishers in Australia on the platform. This means that publishers have begun to look at additional gateways to accessing their content



# MEDIA

## PUBLISHER TRENDS

In our always-on conversations with the media, a couple of key trends have continued to surface.



### Journalists: Free to freelance

- Added pressures on publishers to remain agile means on-staff editorial teams are being small to core staff; quite frequently editors only.
- This means that freelancers are diversifying their title remit to cover a wider array of mastheads. Many journalists 3-4 of the same publications and overlap with each other.
- Good relationships with journalists give us a wide array of verticals to tap into, but they also require diplomacy.



### Advertorial: Striking a balance

- Evolving consumption habits from readers have seen a wider adoption of a pay-to-play model by Tier 1 publications.
- Publishers take varying approaches, with many offering it as part of a 360-degree solution and others leaving it dependent on the strength of the story and their capacity.
- A few lifestyle outlets have shared with us that this is now their primary strategy. Previously, the flights, accommodation, and experience were enough—they now expect additional payment.
- This changing landscape does mean a smaller media pool and strategic about the targets we approach. But it also means that more than ever; credibility and transparency matter.



### Content: Hooks and trends

- Timely hooks create timely stories. Given that so much of destination editorial can be evergreen in nature, aligning ourselves to key events and cultural moments can give editors a sense of immediacy in publishing.
- 'Weird works'. Unique and quirky elements in travel stories get mast head cut-through and create headlines readers want to click.
- Locals' POV. Journalists love compelling stories told by the actual people from the destinations they are writing about rather than just executives, who give an authentic perspective.

# MEDIA

## WHAT OUR AUSTRALIAN NETWORK OF JOURNALIST SAY

In a survey of industry-leading journalists, the below findings gave us some unique insights that impact our future.

844 participated, with 63% of respondents working in digital, 49% print, 16% radio, 12%, and 11% worked in podcasting. Below are some of the most notable findings and how it can benefit our future work.

86% of respondents affirmed that industry and PR contacts remained the primary conduit for top stories in 2023.



The relationships our team cultivates through communication and face-to-face meetings remain our most powerful asset in reaching Australians through media.

Press releases were the second most used story source, used by over 81%.



Our press releases, EDMs and e-blasts are being read! These are a great tool in spotlighting our key messages to journalists.

The top three factors driving journalists to cover stories were informing the public, raising awareness of issues, and entertaining audiences.



Our engagements with journalists should always ladder up to at least one of three pillars: inform, educate or entertain.

47% said they were less likely to cover a story that had already been covered by a media organization.



Unique perspectives can create compelling hooks and content that cuts through.

# MEDIA

## BRANDS AS PUBLISHERS



Brands are increasingly becoming content creators and publishers in their own right; offering a channel mix and large audience that rivals that of traditional publishers.

Strategically using brand partnerships to our advantage enables us to reach mass and niche audiences, aligning the brands values to our own.

Often in media we are one of many destinations being talked about, but when we partner with a brand, we can choose to be the only destination spoken about when a consumer isn't necessarily considering travelling, therefore standing out more.

# MEDIA

## SOCIAL

The social space has seen a lot of disruption since 2020, but what remains is its role as a key decision driver. With the rise of TikTok, true User Generated Content (UGC) has come to the forefront like never before, and we've seen a new rise of micro-influencers. We've also seen trust diminish in legacy channels owned by Meta, and adoption of video first and niche channels. With so much change happening on social, where do we sit in 2024 and 2025?

Audiences co-creating the brand story with UGC. Brands must embrace being creators not advertisers with a content based exchange<sup>1</sup>

There has been 58% growth in brands engaging micro and niche influencers for the authenticity they bring to content<sup>2</sup>

Video continues to dominate. TikTok has grown 47% YOY<sup>3</sup>. 71% of Instagram influencers reported that Reels are the most effective content type<sup>4</sup>.

The emergence of B2B influencers on LinkedIn provides a unique avenue to target high-intent professional audiences in niche markets.<sup>5</sup>

Social impact is coming through 360 executions at key events. Going beyond the singular and tapping into groups drives efficiency and collaboration<sup>6</sup>

More internet users aged 16-64 visit social networks than search engines on a monthly basis<sup>7</sup>. Social SEO is key for maximum reach.



# Travel Demand

Travel is a top priority

75% of Australian travelers plan to take the same number, if not more, trips abroad in 2024 compared to 2023, which is significant because over 9.2M Australians took an overseas trip last year.

Value will play a role in where Australian's choose to go, with flight prices a primary factor in their decision making.

Whilst 2023 was all about 'revenge travel' this year where Australian's choose to go will be fueled by an innate hunger for cultural exploration.

# TRAVEL DEMAND

## MOTIVATION & TRENDS

Cultural exploration, luxe for less, social connection, and milestones are key travel motivators in 2024.

Australians aren't deterred by cost-of-living when it comes to travel, they're making smarter choices so they can still enjoy little luxuries,. They are finding any excuse to book a trip and are influenced by a breadth of trends from Jet-setting, to sustainability, with a healthy hunger to disconnect from being "always on" so they can connect with those they travel with and the places they visit. 2024 will also be the year of the solo and "bleisure" traveler.

### CULTURAL EXPLORATION

From the icons to the lesser-known neighbourhoods, Australians are motivated to immerse themselves in the vibe of the places they visit, choosing to explore what makes them unique, with an interest and respect for indigenous experiences & as well as a love of food.

### VALUE: LUXE FOR LESS

We're getting smart with our 'travel maths' saving so we can splurge where it matters. We're choosing off-peak travel, and cities that are lesser known but like their sister ones which are expensive and overly populated. Aussies are motivated to spend on personalised experiences.

### GIVE ME A REASON

We want a reason to travel, and we find them at every turn! In 2024 those reasons include music concerts (hello Swifties), festivals and events, plus sporting games and iconic sporting locations. Sport tourism is increasing in popularity. Not to mention travelling for a milestone.

### SET JETTING

Over 40 per cent of travelers say they've researched or booked a trip to a destination after seeing it on a TV show or movie. In fact, travelers say TV shows influence their travel decisions more than Instagram, TikTok and podcasts. The "Lotus Effect" is here to stay!

### DISCONNECT & WELLNESS

In an age of always-on we're craving vacations that help us disconnect so we can reconnect. From wellness adventure, to tech free holidays this is less about "day spa retreats" and more about the connection that comes from being social, in nature, and not on your phone.

# TRAVEL DEMAND

## TRAVEL TO THE USA

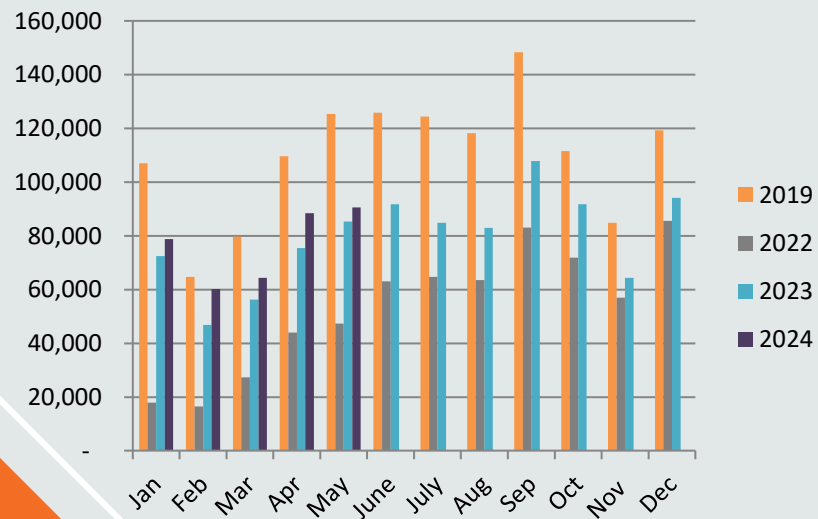
Visitation grew in line with airlift reaching 72% of pre-pandemic levels

We finished 2023, with 954,418 Australian arrivals to the USA, up 49% on last year, and reaching just over 72% of pre-pandemic levels. So far in 2024 (Jan to May) we have had 382,469 Australians enter the USA – up 14% YOY. 2023 ended with Australia as the 10th largest long haul international market into the USA, and we are tracking top 9 for this year.

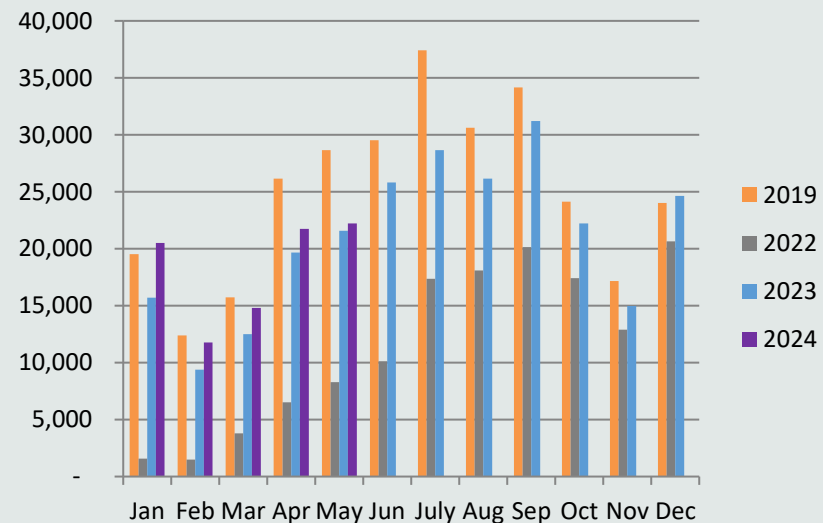
Repeat travel to the USA is very high (73% in 2019). Competition within the USA for Australian visitation is fierce. Many DMO's, including many US DMO's, are once again active in the Australian market.

New Zealand visitation to the USA equaled 252,538 people in 2023, reaching 84% of pre-pandemic levels. So far this year, there have been 91,051 New Zealanders visit the USA, up 16% YOY.

AUSTRALIAN ARRIVALS TO THE USA



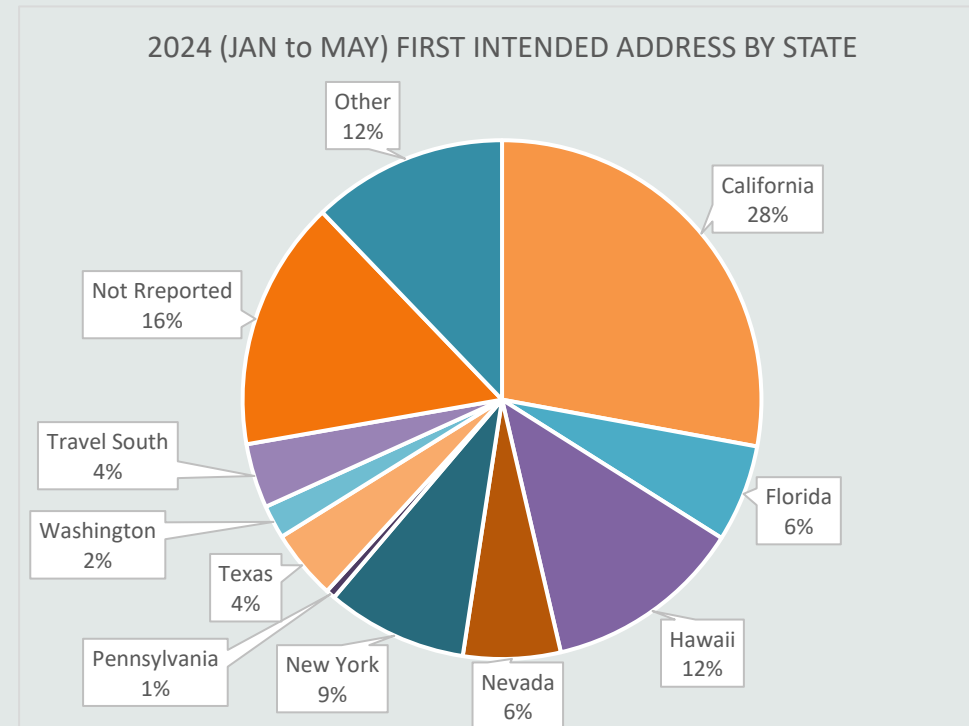
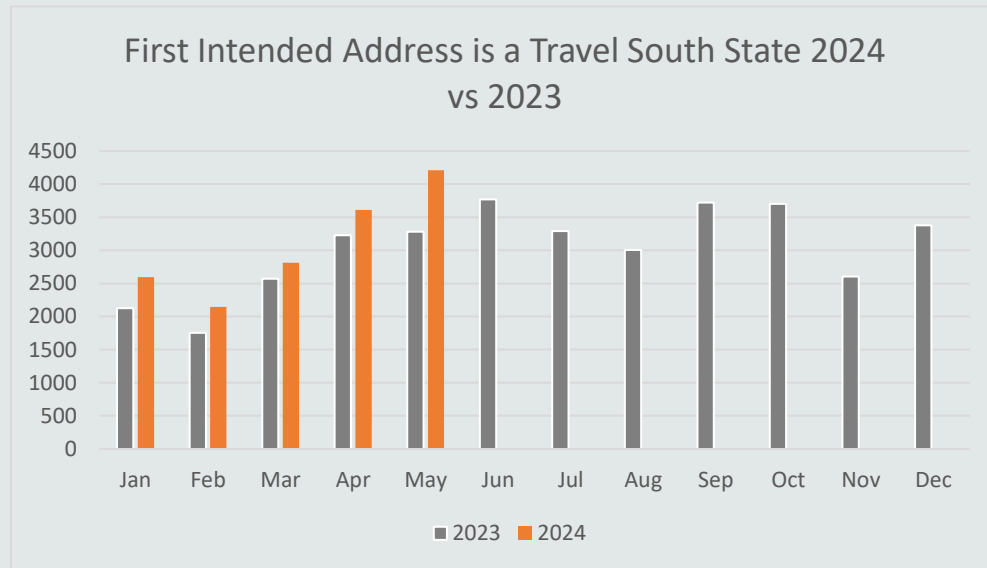
NEW ZEALAND ARRIVALS TO THE USA



# TRAVEL DEMAND

## TRAVEL TO TRAVEL SOUTH USA REGION

36,429 Australians listed one of the Travel South states as their first intended address in 2023. So far this year 15,370 Australians list Travel South as their first intended address, up 19% YOY



Source: National Travel and Tourism Office (NTTO) ADIS/I-94 visitor arrivals. Table I first intended US address by State.



# TRAVEL DEMAND

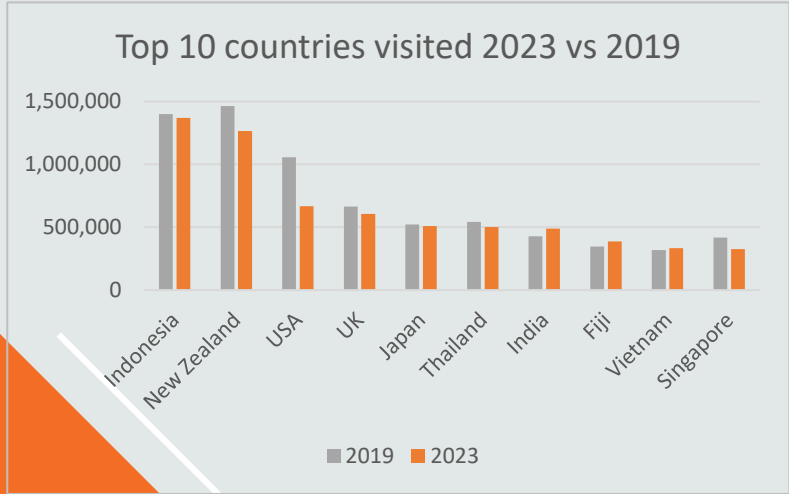
## COMPETITION

We wrap up a year where Visiting Family & Friends, Value, and the 'Lotus' effect drove demand for Europe & Asia

Despite any economic headwinds travel boomed in 2023 with 9.24 million Australians returning from overseas trips, reaching 87% of 2019 levels (source: ABS). Visiting family and friends, and cultural immersion as motivators drove the travel demand to Europe and Asia/Pacific, both regions remaining the USA's biggest competitors, with Japan once more becoming a key competitive threat. Italy demand benefited from what media is calling the "Lotus effect".

Price will remain the biggest barrier to travel with a struggling AUD, and high inflation in the US, but by targeting affluent Australians who have "Europe fatigue" we expect 2024 to be the year that USA travel bounces back.

### TOP VISITED COUNTRIES BY AUSTRALIANS



2023 Visitation as a percentage of 2019		2024 top 10 countries Jan to Mar (% change YOY)	
Indonesia	98%	New Zealand	5%
New Zealand	86%	Indonesia	29%
USA	63%	Japan	90%
UK	91%	India	6%
Japan	97%	USA	15%
Thailand	92%	China	634%
India	115%	Thailand	15%
Fiji	112%	Vietnam	35%
Vietnam	105%	UK	2%
Singapore	78%	Singapore	12%

# TRAVEL DEMAND

## TARGET MARKET

Focus on key segments: Younger Boomers, Gen X and Millennials, with high disposable income

### Where...



Focus on  
eastern  
seaboard  
77% of  
population

### Who...

**3.8M** Millennials aged 25-34  
**6.7M** Gen X aged 35-54  
**3M** Young Boomers aged 55-64  
**2.09M** household income >\$100k

### What...

Align what makes The South unique to Australian Travel Motivators:

- Music > A cradle for American roots music
- Outdoors > Mountains, rivers, beaches
- Food > Vibrant culinary scene with local flavors influenced by culture
- History & Culture > Civil Rights, Southern mansions & rocket science
- Road Tripping > Highways & scenic byways throughout the region

### Travel South USA

Enjoy big city excitement and small-town charm in the 9 states of Travel South USA. Alabama, Kentucky, Louisiana, Mississippi, Missouri, North Carolina, South Carolina, Tennessee and West Virginia

# Summary of market conditions

Travel demand immune to economic headwinds > target Millennials, Gen X and younger Boomers with high disposable income

Travel intent high to USA, but competition is fierce > convert demand for authentic experiences, value, music and that southern hospitality into the south from DFW, IAD and California or NYC from longer road trips or fly drive trips.

Experienced agents in high demand, but there is a growing number of novices > tailor activity for both groups, and maintain contact through newsletter communication and targeted trade activity

Media overstretched > select the right publishers as partners & leverage brands & content creators (including non-traditional verticals such as podcasts) for influence and reach

# STRATEGIC FRAMEWORK OBJECTIVE



GATE 7

# FY24 Objective

Contribute to TSUSA's goal of delivering \$10B in visitor spending by 2026, by increasing visitation, length of stay and visitor spend from Australia and New Zealand. We will achieve this by showcasing all 9 GGP states through our trade training, product development, and media and consumer efforts.





## **BRAND PROMISE & KEY MESSAGES**

GATE 7



# Brand promise

Our elevator pitch to the travel trade and media.

## Welcome All Y'all

Now's the time to feel that warm Southern welcome.

To enjoy the excitement of big cities,  
Charm of small towns,  
And the wide-open spaces of the South.

Come experience food for the soul,  
Activities for the mind & body,  
Music for the heart.  
We've got something for everyone.

It's time to reconnect with friends and family  
the warm, authentic Southern way.

Welcome to the region we call Travel South USA.  
Where the sun shines sweetly,  
Gentility is a given,  
And hospitality is our hallmark!

# Key messages

## Positioning point

1. **Southern USA Diversity** Access from Dallas, Houston, LAX & NYC, Southern USA offers a choice of 9 unique and diverse states to explore, equal in size to Europe.
2. **Essential Southern Road Trip** – Close proximity of diverse experiences make the South a prime destination for road tripping. Beaches, mountains, idyllic pastures, and scenic byways with real southern hospitality make the possibilities endless.
3. **Culinary:** The Southern states provide a multitude of delicious culinary experiences. Each state, with its own stamp on unique food and beverage offerings .
4. **Music:** A cradle for American roots music was born in the South: the blues, rock 'n' roll, country, Cajun, bluegrass, and more.
5. **Outdoors:** From whitewater rafting, hot springs, cycling, salt marshes, caves and beaches to National Parks. The Great Smokey Mountains, New River Gorge, the South is unspoiled and diverse.
6. **History & Culture:** Learn about the key moments that shaped a nation. Civil rights trails, plantation homes and rockets that helped launch space race history
7. **Uniqueness:** Each state is unique, but the south offers food for the soul, activities for the mind and body and music that sings to your heart.

## Why this is important

### How to get there

Convert the demand flying direct into the east coast, and educate the easy accessibility from key gateways

### What to do

Aligning these messages to interests, passions, and motivators

### Why they will love the South

Road trips options for diverse interests and huge diversity within its landscape

An aerial photograph of a coastal wetland or estuary. The water is dark and reflects the sky, with numerous brown, branching landforms (likely mudflats or mangroves) protruding from it. A small white boat is visible in the lower-left quadrant of the water. The image is partially obscured by a white diagonal line running from the top-left corner towards the center, and an orange triangle in the bottom-right corner.

# TOURISM DEVELOPMENT STRATEGY & TACTICS

GATE 7

# Our strategic approach

Taking these insights, challenges and in order to meet our objective we need to:

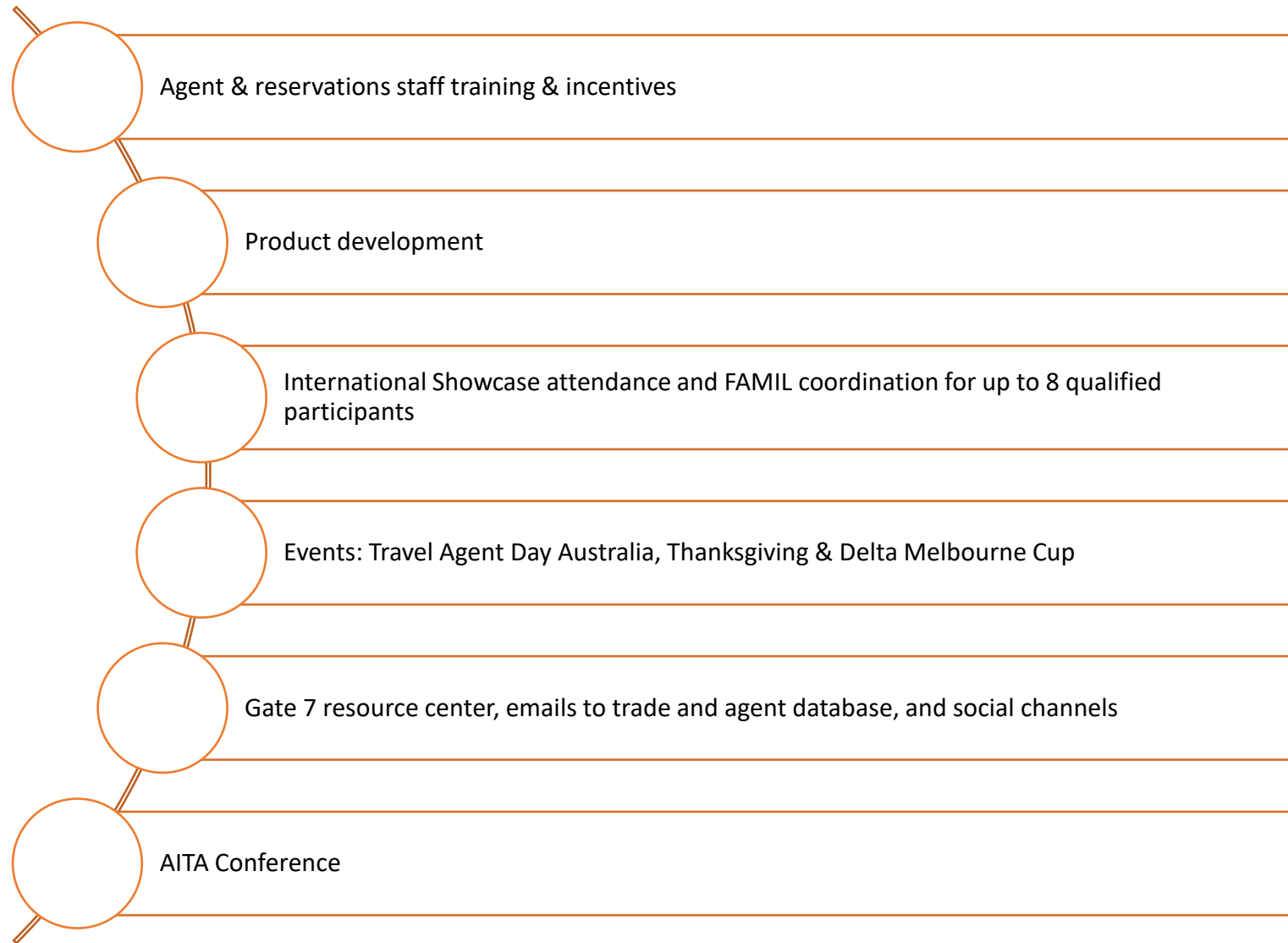
1. Continue to **diversify training & agent engagement**, a two-pronged approach (**experienced and novice**)
2. Continue to **Grow and build out** our product where it matters (**influential operators with a loyal customer base that have high disposable income**)
3. **Targeted consumer co-ops** that connect us to our key messages, (**Music, culture, sport & foodie lovers**)

Key messages summarized for training as follows:

With a warm welcome and that famous southern hospitality, the south greets travelers with a magnitude of unique experiences that cater to every demographic and budget. Offering diverse music scenes, rich heritage and renowned sporting events all served up with incredible culinary delights, the region is a perfect self-drive collection of states, cities and outdoor adventures. And with direct gateway access and strong regional airlift, travel to and within the Southern USA has never been better.

# Tactics scope

---



# Target Trade

---

Aligning to our strategic approach we have identified the following Tier 1 travel partners:

Experienced: Home Bases Agents and High Achievers with strong high value Gen X and Boomer customers

## Home Based

Target home bases networks such as **Travel Managers**, with a network of 500+ home bases agents , **MTA Travel** with 400+ advisors, *itravel* with 140 members and **Envoyage** with a 1000+ consultants. We will focus on cluster trainings (in person), webinars, market days & Travel Agent Day Australian (TADA). We will continue to focus on package development via The Travel Junction for the best dispersal and reach.

## High Achievers:

Travel Agent high achievers through Australian Travel Industry Association (ATIA) conference sponsorship, TADA – both aligned with awards events and Delta top producers Melbourne Cup event.



# Target Trade

---

Aligning to our strategic approach we have identified the following Tier 2 travel partners:

Novice : Flight Centre and Helloworld's new novice agents.

- |                |   |
|----------------|---|
| Flight Centre: | Focus on Flight Centre new agents – Flight Centre is Australia's largest retail travel agency. They are currently have <b>1810 staff</b> for their <b>269 stores</b> .  |
| Helloworld:    | Focus on Helloworld's new Travel Academy and training new staff on the Travel South USA region. Helloworld have <b>2,051 members</b> in their network within Australia and New Zealand.                             |
| Messaging:     | We will focus on the novice agent to get the biggest bang for our buck training on the diversity offered in the Southern USA through our pillars of Music, Culinary, Outdoors, History & Culture, and Road Tripping |

# Training – Tourism Exchange USA

---

## Focus;

- Homebased Agents (MTA, Travel Managers & iTravel)
  - Cluster trainings, webinars
  - Conferences and training days
- Independent Tour Operators/Agencies
  - Travel rite
  - Inspiring Journeys
  - Chris Watson Travel
  - Entire Travel Group

## Messages;

- Building awareness on the South
- Availability of product
- Diversity of product

## Measures of success;

- 100
- Queries and engagements

## Dates

- All year focus

## Budget

- \$3,000

# International Showcase - Atlanta

---

Recruit Five top Australian and New Zealand wholesalers/tour operators and one media partner for attendance at International Showcase in November 2024:

1. Infinity Holidays
2. Helloworld/Viva Holidays
3. Luxury Escapes
4. itravel
5. Chris Watson Travel
6. Flight Centre/Infinity Holidays New Zealand
7. Travel Managers
8. Flight Centre AU
9. Trip a deal
10. Rediscover Travel

Trade Media Partnership – we could also partner with a leading Australian travel trade publication **Karryon** to amplify and raise awareness of our activity at International Showcase. Based on a paid partnership, one writer will attend International Showcase, sharing the travel trade group's experiences via digital and social, encouraging engagement from KarryOn's large following.

## Measures of success;

- Minimum 5 Tour Operators
- 1 Media Partner

## Dates:

1<sup>st</sup> December – 5<sup>rd</sup> Dec 24 International Showcase  
5<sup>th</sup> - 8<sup>th</sup> December Post IS Fams

## Budget

- \$4,000 (Travel & Entertainment expenses)
- \$10,000 (Media Partnership)
- Airfares, super fam and conference provided by Travel South USA

# Thanksgiving Sponsorship

---

## Travel Industry Thanksgiving Lunch

Gate 7 Thanksgiving lunch is an annual event to thank the travel industry for support.

Traditional Thanksgiving menu with turkey, corn bread, stuffing and all with trimmings for 60-70 influential travel trade partners, airlines and trade media at Misfits Redfern.

### Target

- Trade - Major Tour Operators, Wholesalers and Agencies
- Airlines – United / Delta / AA / Qantas
- Trade Media

### Measures of success;

- 60-70 influential travel trade partners
- Traditional Thanksgiving Lunch

### Date

Thursday 28<sup>th</sup> November 2024

### Budget

- \$500

# BUSA Visit the USA

---

Attendance at Brand USA - Visit the USA New Zealand

Target – New Zealand Travel Agents in Auckland & Wellington

- Engage, train and grow our New Zealand Agent database
- Highlight Seasonal capacity from Auckland and Christchurch into USA
- Get bang for buck in numbers in New Zealand on a bi-annual participation schedule

Measures of success;

- 100 + Agents in Wellington
- 100+ Agents in Auckland
- Interaction and growth with New Zealand Travel South Newsletter database
  - 1,157 Current members

Date

10-11<sup>th</sup> February 2024

Budget

- \$3,500

# TADA Attendance

---

## Bronze Sponsorship of Travel Agent Day Australia (TADA)

TADA 24 is a one-day conference aiming to bring together over 250 top agents from around Australia. Hosted in Melbourne at Marvel Stadium, TADA will target 4/5 star leisure agents through scheduled meetings, networking session and free flow expo format.

### Target

- 250 Australian Travel Agents
- 20+ scheduled appointments
- Awards Ceremony and gala dinner

### Measures of success;

- 20+ one on one meetings
- 250 Industry Attendees
- Awards Event with 30+ Nominees

### Date

Wednesday 2<sup>nd</sup> October 2023

### Budget

- \$3,000



# AITI Conference

---

## Destination Sponsorship of the Australian Travel Industry Summit – Beyond Borders

Beyond Borders is the pre-eminent summit hosted by the Australian Travel Industry Association (ATIA). The summit will complement the National Travel Industry Awards (NTIA) being held the following evening, by creating opportunities to learn from leaders across the multiple facets of the travel industry that ATIA represents.

### Target

- Participation creates unique opportunities for brand exposure and attachment to ATIA's thought leadership series.
- 500+ attendees with
  - 65% Agency front line
  - 20% Tour Operators, Wholesalers
  - 15% Technology
- Beyond Borders will provide access to finalists across 35+ industry award categories, placing your Travel South USA in front of the industry's highest achievers.

### Activation

To highlight our diverse southern states to this high achieving audience in a thought leadership lead conference, Travel South USA will use activation moments to engage with the attendees including space age ice-cream to represent Alabama, hot sauce tasting for Louisiana and Krispy Kream morning team break for North Carolina.

### Measures of success;

- 20 influential travel trade partners
- Melbourne Cup Lunch and viewing party
- Travel South Training

### Date

Friday 25<sup>th</sup> October 2024

### Budget

- \$5,000
  - \$2,200 Sponsorship
  - \$2,800 Activation

# Melbourne Cup sponsorship

---

## Melbourne Cup Lunch with Delta

Co sponsorship of Melbourne Cup Event with Delta Air Lines. Training, networking and highlighting the Southern Hospitality with an interactive themed experience

### Target

- Trade - Major Tour Operators, Wholesalers and Agencies
- Delta Airlines top sellers
- Trade Media

### Measures of success;

- 20 influential travel trade partners
- Melbourne Cup Lunch and viewing party
- Travel South Training

### Date

Tuesday 7<sup>th</sup> November 2023

### Budget

- \$2,500

# Newsletters

---

## The Southern Series

Educate and showcase the 9 GPP member states of Travel South USA with a custom-made monthly newsletter. The newsletter will highlight a different theme every month and include a section for each state, ensuring equal coverage over the year.

The curated newsletter will be distributed to Gate 7's travel industry database which represents 4306 retails and wholesale agents in Australia and New Zealand.

## Measures of success;

- Open Rate
- Detailed reporting

## Dates

- September - June 2023-25

Budget \$12,000 AUD

# Resource centre and newsletter

---

**We've learnt that** valuable content like ready-to-go itineraries, bucket list activities and special events for travel agent clients are saved and bookmarked for later. Given how time-poor the industry is our goal is to deliver content across social and email that agents scan, share, and save, not scroll past & delete.

## Our scope and approach

### 1. Newsletter

- 10 x Travel South stand-alone monthly newsletters; aligned to Travel South USA calendar of content to the Australian and New Zealand front line staff and wholesale reservations agents.

### 2. Social Media

- Twelve destination content pieces as part of Gate 7's social media marketing calendar

### 3. Resource Centre

- Updated monthly with sample itineraries and brochures, story ideas, what's on and new, and images & video. Training modules can also be promoted through this channel.

### 4. Closed Facebook Agent Groups

- Direct communication with highly engaged agents ideal for sharing content they can share directly with their followers who are customers. Agents are the real travel influencers.

You have access to  
an active database  
of Australian and  
New Zealand Retail  
& Wholesale  
Agents = 4,306

# PUBLIC RELATIONS STRATEGY & TACTICS



GATE 7

# Our strategic approach

Our objective is to deliver a steady stream of earned coverage that aligns to our objectives and key messages.

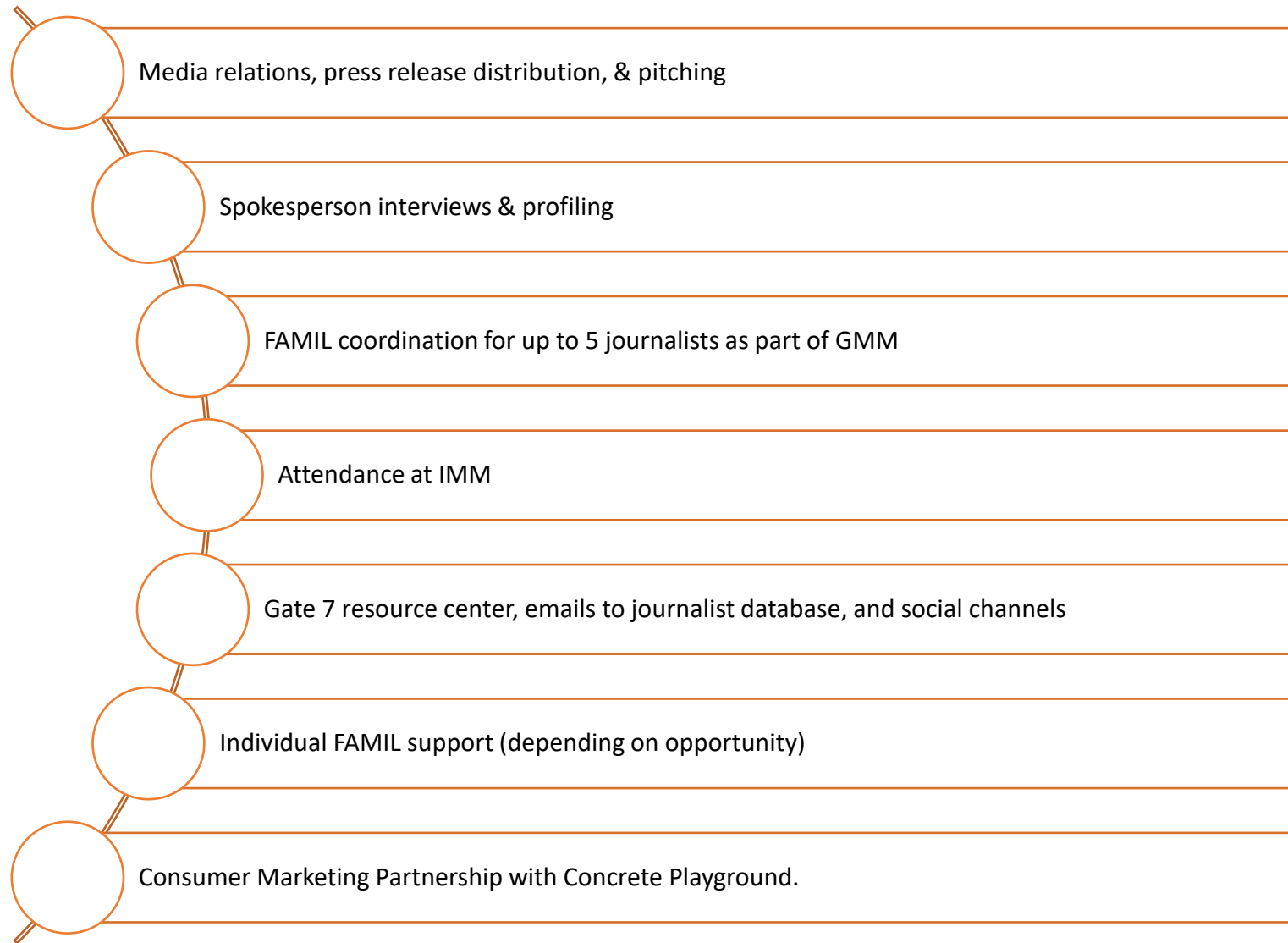
Specifically, our public relations efforts will lather up to three pillars:

1. **Build awareness** of all 9 GPP states and the depth of experience on offer in each with a steady drumbeat of coverage and activity throughout the year.
2. **Effectively leverage Global Week**, to maximize the return with key journalists participating and generating in-depth stories.
3. **Showcase the key messaging pillars of Travel South** and layer them throughout our storytelling, building awareness and driving consideration.



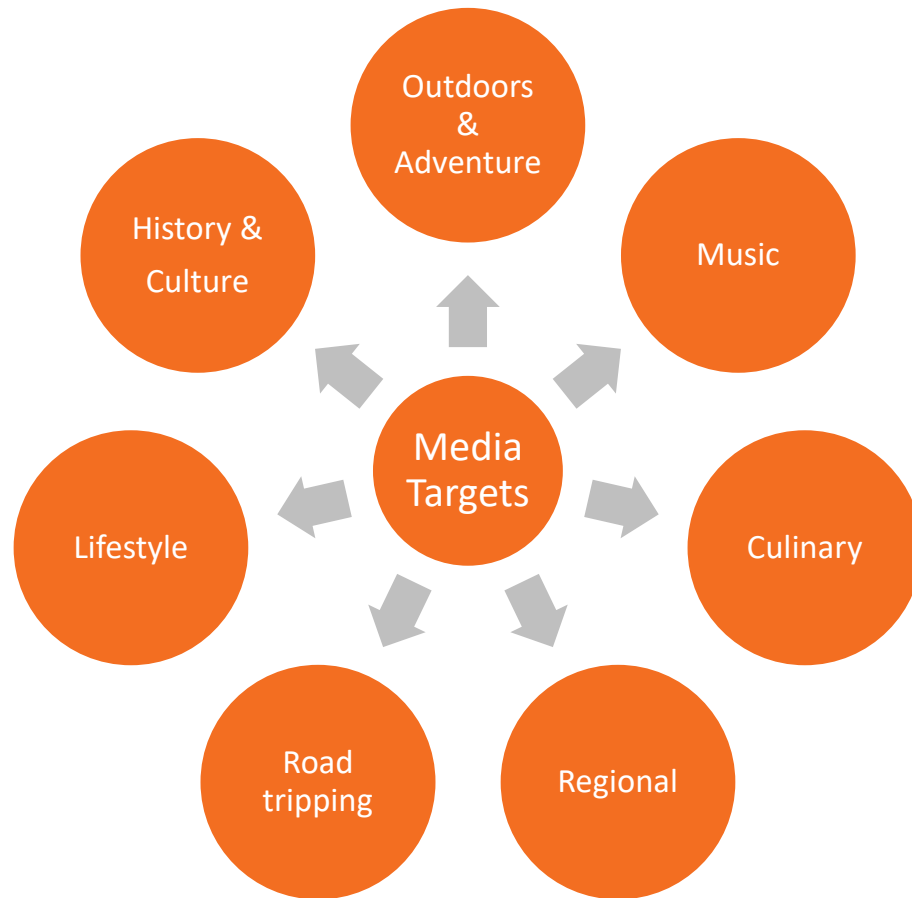
# Tactics scope

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# Media Targets

We have identified 7 media target segments to focus on which speak directly to our target audience.



# Media Titles

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## Our most wanted hit list

These media outlets provide a strategic mix of mass reach, targeted travel audiences, and regional influence, leveraging their mass market reach, syndication opportunities, or focus on travel and lifestyle.

Outlet	Type	Market
Explore	Online/Print	Mass (Syndication)
Escape	Online/Print	Mass (Syndication)
Traveller	Online/Print	Mass (Syndication)
The Australian	Online/Print	Mass
NZ Herald	Online/Print	Mass
News.com.au	Online	Mass
Stuff	Online	Mass
Nine Travel	Online	Travel/Lifetsyle
Qantas Magazine	Print	Travel

# Resource Centre and Newsletter

---

Relationships are the heartbeat of the travel and media industries. Gate 7 maintains a robust database of 400 journalists actively engaged across all sectors of the media industries who have access to our Resource Centre and communications.

We will use the Resource Centre to house useful Philadelphia assets such as media releases and imagery, plus provide essential knowledge such as FAQs, story starters, 'what's on' and 'what's new' updates. This will act as a go-to for media, in addition to our ongoing communication with and pitching to individual journalists.

## Our scope and approach

### 1. Newsletter

- Two stand-alone newsletters; focusing on events, what's new, etc.
- Four quarterly email inclusions; not exclusive. This is where we strategically combine efforts with other gate 7 clients and will be themed based. Example themes include road trips, new hotels, new experiences, and sustainability.

### 2. Social Media

- Six destination content pieces as part of Gate 7's social media marketing calendar.

### 3. Resource Centre

- Updated monthly with story ideas, what's on and new, and images & video.

You have access to an active database of 445 journalists (386 with marketing consent).

### Budget

\$12,000

### Timings

Throughout the year.

# Always on pitching & media calls

---

Through creative editorial angles that leverage the key pillars of storytelling for Travel South, we'll generate a steady drumbeat of earned coverage in target consumer and travel publications.

Each month, Gate 7 will consult with Travel South USA and participating GPP states on upcoming destination news and create a flexible schedule of localised story angles to proactively pitch to Australian and New Zealand media. These story angles will align with key events and seasonal periods, GPP press release themes, and distribution plans and be tailored to meet the needs and editorial calendars of the Australian and Kiwi media.

Promoting our GPP states through both virtual and in-person media meetings will allow us to strengthen existing media relationships and establish new ones. Our targeted media list will encompass print, online, radio, TV, podcasts, and digital platforms.

## Measures of success:

- 80 articles and 34 million impressions\* generated through Always On Pitching, Media Calls, as well as earned media throughout the rest of the program including media fams

## Date:

Ongoing

# IMM 2025

---

Gate 7 will attend Travmedia's IMM conference in February on behalf of Travel South USA. The aim is to hold media meetings with 22 Australian journalists and take advantage of any additional networking opportunities surrounding the conference.

We'll aim to educate attendees on the many unique and diverse experiences available in the Southern USA and build and strengthen relationships with important media contacts with whom to engage throughout the year.

Following the event, Gate 7 will share requested assets with media, and aim to secure stories as a result of participation.

## Measures of success

22 media meetings

## Budget

\$2,000

## Date

February 2025

# Global week media

---

Gate 7 will invite five top-tier Australian and New Zealand writers to the South to attend the interactive Global Media Marketplace in April 2025. The media will engage in two full days of scheduled appointments, networking events, and city tours, all designed to introduce them to suppliers, workshop story angles, and improve their destination knowledge.

Following Global Media Marketplace, each journalist will embark on individual family trips to separate states and produce high-quality media and content coverage in their respective media outlets.

Gate 7 and Travel South will pre-vetted writers to ensure they align with key messages and strategy. Prior to the family, Gate 7 will negotiate coverage deliverables and workshop angles to ensure the writer/influencer and states' expectations are met.

## Measures of success:

- 5 Global Media FAM's
- Minimum 10 standalone stories in top tier media outlets (1 per hosting city / state, and 1 per individual state-hosted fam)

## Date:

April 2025



# CONSUMER MARKETING



GATE 7

# GPP state content campaign

Concrete Playground is an Australian lifestyle and entertainment website that provides curated guides and recommendations for urban experiences. It covers a wide range of topics, including food and drink, arts and culture, events, travel, and entertainment. Concrete Playground targets young urbanites looking for the latest trends and happenings wherever they are planning on travelling to, offering reviews, features, and news about local hotspots and activities.

We'll collaborate with Concrete Playground on a "See The South" partnership designed to include each GPP state while ladder up to four of the key pillars for Travel South. All features will be published nationally.

## Deliverables:

- 1x "See the South" takeover hub
- 4 x Thematic Guides, in this style, linked to our core pillars, each featuring an even mix of different states:
- 4x Feature Guides: Music, Roadtrips Great Outdoors and Food
- 1x Video Reel of supplied images/videos showing one MUST DO from each state to run on Meta and Tiktok.
- 3x Solus EDMS dedicated to See The South
- 12x Editorial Inclusions in our EDM
- Boosted Meta Amplification for each feature and video & Boosted Tiktok amplification for each feature and video

## Measures of success:

- Content Reads: 40,000
- Video Views: 403,714
- Impressions: 757,964
- Reach: 381,774
- Each state receives between 3 and 6 inclusions

## Date:

September

## Budget:

\$40K

(Value: \$140,286)

# Packaging product to support content campaign

---

Create and integrate Southern USA city stays, packages and itineraries to convert GPP state content campaign into sales.

Partnering with travel conversion partner to develop FIT itineraries that will be promoted via our content campaign.

Focus on Travel South pillars, Music, Food, Road Trip and the outdoors to create a range of product for conversion.

Working in partnership with either Chris Watson Travel or Rediscover Travel to create a landing page to drive the consumer to book the package/itinerary promoted with our media partner.

Measures of success;

- Specialty product created for content
- Multistate itineraries to include all GPP partners

Date

TBC

Budget

- \$10,000



**OUT OF SCOOP**



**GATE 7**

# GIC24: Vacaay Campaign

Although not being implemented by Gate 7, several states of the South will be active as part of a consumer campaign with travel content performance marketing platform Vacaay.

This global campaign will focus on a few key markets for Travel South, with states choosing to buy into specific markets for promotion. **Louisiana, North Carolina, South Carolina & Tennessee** will be active in the Australian market.

As part of their partnership buy-in, each participating step will receive 60 POI (places of interest) cards, each of which will contain detailed information about what the consumer is looking at, with the ability to add to lists, share with friends, review and suggest additions. Additional campaign elements include list collation, social media posts, EDM posts and a pool of money set aside for retargeting the most engaged users.

Gate 7 will be involved with the retargeting phase – working with Vacaay to identify the best partners to work with when it comes to strategizing the process of converting awareness and consideration into travel intent for Australia.

## Measures of success:

- 120k+ high quality engagements
- 60+ POI cards per participating state
- Lead & sales value with trade partner during retargeting phase

## Date:

October 2024 to January 2025

The Vacaay logo is displayed in white lowercase letters on a black rectangular background. The letters are bold and modern, with a registered trademark symbol (®) at the end of the word. The logo is positioned in the lower right area of the slide, above a large orange triangle that points towards the bottom right corner.

**vacaay®**

# GIC24: Where Music Was Born

'The American South - Where Music Was Born,' will be a curated consumer marketing campaign produced by the team at Dream Plan Go. Comprising of a bespoke campaign site build, with traffic drivers and strategic partnerships with Spotify and Ticketek, this campaign will leverage the South's indisputable status as the birthplace of numerous beloved music genres to captivate an audience of music enthusiasts, all while telling the comprehensive story of the region's hospitality, culture, history and great outdoors.

Buy-in partners for this campaign include **Alabama, Louisiana, Mississippi, South Carolina & Tennessee.**

An optional add on – of which Mississippi and Tennessee bought into – will see a Travel South presence at two of Australia's largest music events: the Tamworth Country Music Festival and the Parkes Elvis Festival. A strategic partnership with Chris Watson Travel will develop a strong B2B layer into this campaign. This portion of the activity will be overseen by the team at Gate 7.

## Measures of success:

- 5m+ impressions
- 1m+ reach
- Sponsorship presence at music festivals
- Sales of Chris Watson travel packages

## Date:

Campaign: November 2024 to January 2025  
Music Event Sponsorship & Coop: January 2025





## BUDGET & TIMINGS



GATE 7



# FY25 calendar of activity - Trade

		2024						2025					
		July	August	September	October	November	December	January	February	March	April	May	June
TRADE	BUDGET												
Training	Retainer	Ongoing											
Consumer marketing			Packaging Product to Support Concrete Playground										
Trade shows / in person events					Travel Agent Day Australia	Thanksgiving Event			Brand USA New Zealand				
Meetings	Retainer	Ongoing											
Reporting	Retainer	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report	Monthly Report
International Showcase & Specialty Reports						State Reports International Showcase	International Showcase	International Showcase Report				Product Audit	End of Year Report
Fams							IS Fam						
Newsletter	Retainer			Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter
Resource Centre	Retainer		Resource Centre			Resource Centre			Resource Centre			Resource Centre	

# FY25 calendar of activity – PR

Activity and investment summarised below:

		July	August	September	October	November	December	January	February	March	April	May	June
PR	BUDGET												
Pitching	Retainer	Ongoing											
Concrete Playground Partnership	\$40,000			Concrete Playground Partnership									
Trav Media IMM	\$2,000								Trav Media IMM Feb 2025				
Media Meetings	Retainer	Ongoing											
Reporting	Retainer	July Report	August Report	September Report	October Report	November Report	December Report	January Report	February Report	March Report	April Report	May Report	June Report
Travel South Global Week Media Fams	\$4,000										Global Media FAMs & Marketplace April 2025		
Newsletter	Retainer			Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter	Newsletter
Resource Centre	Retainer		Resource Centre			Resource Centre			Resource Centre			Resource Centre	

# Budget – Revenue & Fees

Australia and New Zealand Global Partnerships	FY 24/25
<b>REVENUE</b>	
Alabama - AU	\$20,000.00
Arkansas - AU	\$0.00
Georgia - AU	\$0.00
Kentucky - AU	\$20,000.00
Louisiana - AU	\$20,000.00
Mississippi- AU	\$20,000.00
Missouri - AU	\$20,000.00
North Carolina - AU	\$20,000.00
South Carolina - AU	\$20,000.00
Tennessee - AU	\$20,000.00
West Virginia - AU	\$20,000.00
Carry Over (Mission - less Partner \$)	
<b>TOTAL REVENUE</b>	<b>\$180,000.00</b>
<b>Australia Sales Activities</b>	
<b>Representative &amp; Consultant Fees</b>	
In-market marketing & communication support	\$79,832.00

# Budget - PR

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Media - Communication PR Promotions	
Media Newsletters	\$12,000.00
TravMedia IMM	\$2,000.00
Media meetings, coffees, dinners, travel etc	\$2,668.00
Media Monitoring	\$3,500.00
International Showcase Trade Media Partnership	\$10,000.00
Consumer Marketing/Advertising	
Multi State Content Campaign – Concrete Playground	\$30,000.00
Trade Partner conversion	\$10,000.00

# Budget - Trade

<b>Trade -Training Co-op Events ( Other professional svc)</b>	
Newsletters	\$12,000.00
Trade Training- Tourism Exchange Product	\$3,000.00
Delta Melbourne Cup - Top Producers function	\$2,500.00
VUSA Membership	\$500.00
AITA Conference	\$5,000.00
Thanksgiving Sponsorship	\$500.00
TADA	\$3,000.00
<b>New Zealand</b>	
Brand USA - Wellington/Auckland	\$3,200.00
Visit USA New Zealand Membership	\$300.00
<b>TOTAL TRADE + PR + FEES</b>	<b>\$180,000.00</b>

# ACCOUNT MANAGEMENT



GATE 7



# ACCOUNT MANAGEMENT

## MARKET OVERVIEW & ANNUAL PLAN

At the start of the contract period a complete market overview is completed with the annual plan to inform our strategy and tactics

## DISTRIBUTION ANALYSIS

A product audit and distribution analysis completed to inform product development strategy and set targets and activity for the year

## MONTHLY REPORTS & MARKET INTELLIGENCE

Detailed monthly reporting delivered the 10<sup>th</sup> of the following month. They will include media & industry contacts, agents trained, and a summary of results for any activity that ran in market.

## QUARTELY PLANNING

Quarterly check in with the Account Team to review activity to date and check that the next quarters planned activity is still aligned to your objectives

## MONTHLY CALLS

With your account manager we can schedule monthly work in progress calls, as well as provide a monthly top line summary email of what's happened to date and our focus for the following month



# APPENDIX




CURRENT **AIR LIFT**

GATE 7





# Current 2024 Airlift

Airline	Services May 2024
	<p><b><u>Australia</u></b></p> <ul style="list-style-type: none"><li>• 8 x weekly Sydney to Los Angeles (Daily A380 + 1p/w 789) – Moving to 9 x weekly 14 July 2024 (Daily A380 + 2p/w 789)</li><li>• 5 x weekly Sydney to Honolulu (A330)</li><li>• 9 x weekly Melbourne to Los Angeles (787-9 x7 A380 x 2) - Moving to Daily 14 July 2024 (6p/wA380 + 1p/w 789) = 20% increase in capacity</li><li>• Daily Brisbane to Los Angeles (A330)</li><li>• Daily Sydney to Dallas/Fort Worth (789)</li><li>• 3 x weekly Melbourne to Dallas/Fort Worth (789)</li><li>• 3 x weekly Sydney to San Francisco (789)</li></ul> <p><b><u>New Zealand</u></b></p> <ul style="list-style-type: none"><li>• 4 x weekly Auckland to NYC (JFK) - Connects from all Australian Cities – (increase to Daily 13<sup>th</sup> August 2024)</li></ul>
	<p><b><u>Australia</u></b></p> <ul style="list-style-type: none"><li>• Daily Sydney to San Francisco (777)</li><li>• Daily Melbourne to San Francisco (777-9)</li><li>• Daily service from Sydney to Los Angeles (787-9)</li><li>• Daily service Melbourne to Los Angeles (787-9)</li><li>• 3 x weekly from Brisbane to San Francisco (777)</li><li>• 3 x weekly Sydney to Houston (787-9) 30 Oct 23 – Daily beginning 17 Dec 23 to March 2024 - On Hold till late 24</li><li>• 3 x weekly (seasonal) Brisbane to Los Angeles 29 Nov to Mar 2024 - On Hold till late 24</li></ul> <p><b><u>New Zealand</u></b></p> <ul style="list-style-type: none"><li>• 3 x weekly Auckland to San Francisco (777)</li><li>• 3 x weekly (seasonal) Auckland to Los Angeles starting Oct 28 (Increase to 4 x weekly from 5 Dec) to Mar 2024 On Hold till late 24</li><li>• 3 x weekly (seasonal) Christchurch to San Francisco Dec 2023 to Mar 2024 On Hold till late 24</li></ul>

# Current 2024 Airlift

Airline	Services May 2024
	<p><b>Australia</b></p> <ul style="list-style-type: none"><li>• Daily Sydney to LAX (A350) – will increased to double daily in Dec 24</li><li>• 3 x weekly Brisbane to LAX ( A350-9, Seasonal 4 dec 24 to 28 March 25) - <b>NEW</b></li></ul> <p><b>New Zealand</b></p> <ul style="list-style-type: none"><li>• Daily AKL to LAX (A350, Oct 30 – 31 March 2024) – <b>On Hold till late 24</b></li></ul>
	<p><b>Australia</b></p> <ul style="list-style-type: none"><li>• Daily Sydney to Los Angeles (777-300 then 787-9 from April 24)</li><li>• Daily Brisbane to DWF (787-9, Seasonal 27 Oct 24 till March 25) - <b>NEW</b></li></ul> <p><b>New Zealand</b></p> <ul style="list-style-type: none"><li>• Daily (seasonal) Auckland to Dallas/Fort Worth (787-9) Nov 23 until March 24 <b>On Hold till late 24</b></li><li>• Daily (seasonal) Auckland to LAX (787-9) 23 Dec 23 until 17 Feb 24 (3x weekly till Mar 24) <b>On Hold till late 24</b></li></ul>
	<p><b>New Zealand</b></p> <ul style="list-style-type: none"><li>• 10 x weekly Auckland to Los Angeles (777-300)</li><li>• Daily Auckland to Houston (777-300)</li><li>• Daily Auckland to San Francisco (777-300)</li><li>• 3 x weekly Auckland to New York (787-9)</li><li>• 3 x weekly Auckland to Honolulu (787-9) increasing to 5 x weekly in peak periods (Nov 2023-March 2024)</li><li>• 3 x weekly Auckland to Chicago (787-9) - <b>Suspended</b></li></ul>

# Current 2024 Airlift

Airline	Services May 2024
	<p><b><u>Australia</u></b></p> <ul style="list-style-type: none"><li>• 5 x weekly Sydney to Honolulu (A330) - with connections to SFO, LAX, Boston, NYC, Seattle, Portland, Sacramento, San Diego, Phoenix, Las Vegas.</li></ul> <p><b><u>New Zealand</u></b></p> <ul style="list-style-type: none"><li>• 3 x weekly Auckland to Honolulu (A330) – till April 2024, then returning November 2024</li></ul>
	<p><b><u>Currently</u></b></p> <p>Air Canada has no direct flights into the USA but is heavily promoting entering the US via Vancouver or Toronto connections. YVR connects to LAX, SFO, SEA, SAN, PHX, LAS, HOU, NYX &amp; YYZ to PHL, ATL, BNA &amp; MSY</p> <ul style="list-style-type: none"><li>• Daily Sydney to Vancouver (777-200) increasing to 10 x weekly Nov – March (787)</li><li>• Daily Brisbane to Vancouver (787) – (up gauging to 777-300 in high season Nov – March)</li></ul> <p><b><u>New Zealand</u></b></p> <ul style="list-style-type: none"><li>• 3 x weekly Auckland to Vancouver (Seasonal October 23 – March 24)</li></ul>
	<p><b><u>Australia via Fiji</u></b></p> <ul style="list-style-type: none"><li>• Daily Sydney/Brisbane/Melbourne to Fiji connects to Los Angeles via Nadi (A350)</li><li>• 2 x weekly Adelaide/Canberra to Fiji connects to Los Angeles via Nadi (A350)</li><li>• 5 x weekly Sydney/Brisbane/Melbourne to Fiji connects to San Francisco via Nadi (A 350)</li><li>• 2 x weekly Adelaide/Canberra to Fiji connects to San Francisco via Nadi (A350)</li></ul>
	<p><b><u>Australia</u></b></p> <ul style="list-style-type: none"><li>• 5 x weekly to Hawaii (787-7)</li></ul>

# TRADE **LANDSCAPE**

GATE 7

## TRAVEL TRADE KEY PLAYERS

# Flight Centre Travel Group

The Flight Centre Travel Group (FCTG), headquartered in Brisbane, Australia is a company-owned leisure and corporate travel business with location in 24 countries. It's one of Australia's most significant two players, encompassing mass reach through their travel agent network and distribution through their own in-house travel wholesalers.

Flight Centre has recorded one of its strongest ever starts to a financial year in 24/25, exceeding pre-pandemic profits in their leisure arms. The five-fold increase in pre-tax profit comes to \$106.2m over a six-month period. While all business verticals performed strongly, corporate played a significant role, contributing a record \$3.1 billion in TTV, as the group outpaces the broader sector's recovery and activity globally, reaching 72 per cent of pre-COVID levels.

Indeed, all leisure categories were again profitable, with online, independent, luxury and complementary pillars contributing 45 per cent of TTV and total leisure business up around 20 per cent versus last year's first quarter result.

Flight Centre Travel Group (FCTG) independent arm have recently launched a new flagship global brand "Envoyage", aiming to serve as a central hub for all Flight Centre Independent (FCI) agents and agencies. Invitation only, Link Travel, remains focused on luxury and business travel with 20 members and will remain independent under FCI. Luxury Travel Collection, the luxury arm of FCI, introduced in 2023 to entice new independent businesses, has also grown to 9 independent members, also includes Travel Associates and Scott Dunn.

At Flight Centre, everything old is new again, as FCTG plans to bring back both Cruiseabout and Student Universe as well as recently rebranding The Travel Junction – back to the iconic Infinity Holidays. Whilst Infinity wholesale, is still only aimed at external agencies (MTA, ittravel, Travel Managers etc) they have invested in a reservations team to support complex itineraries and could soon be the preferred system for Flight Centre Independent.



# TRAVEL TRADE KEYPLAYERS

## FLIGHT CENTRE TRAVEL GROUP

### WHOLESALE



- Helio – FCTG preferred Product
- Infinity – Wholesale to other AU/NZ Retail Brand
- Ignite Travel Group – My Holidays & Holiday Exclusives

### RETAIL



- 410 Stores globally
- 3500+ Consultants globally



- Return of Cruiseabout



- Newly relaunched Student OTA with membership benefits
- Operating in Australia/NZ/USA and UK

### LUXURY RETAIL



- 85 Stores in Australia
- 300+ Experienced Agents
- Virtuoso's largest network

### INDEPENDENT LUXURY RETAIL



- Independent Travel Associates
- Link Travel – 20 Members
- Luxury Travel Collection – 9 members

### INDEPENDENT RETAIL



- 400 Independent agencies
- 1000+ Consultants
- Envoyage
- Independent Flight Centre,
- Travel Manager NZ 180 members

# TRAVEL TRADE KEYPLAYERS

## FLIGHT CENTRE TRAVEL GROUP

### ONLINE

Aunt Betty

FLIGHT CENTRE  
**EXCLUSIVES**  
HAND-PICKED HOLIDAYS AT AMAZING PRICES

- FlightCentre.com
- AuntBetty.com

*Online represents 30% of FCG volume, up from 20% in 2022*

### OTHER

 **TRAVEL MONEY**  
GROUP

**BYOjet**  
Book your own

**FLIGHT CENTRE**  
Travel Academy

- Travel Money Group offering currency conversion and travel money cards
- BYO Jet for charter flights out of Australia, new Zealand, US and UK
- Flight Centre Academy aimed at suppling and training the next generation of consultants

### CORPORATE RETAIL

**FCM**  
 **CORPORATE TRAVELLER**  
bring an expert on board

**FCM** MEETINGS  
& EVENTS

**stageandscreen**  
TRAVEL SERVICES

**FLIGHT CENTRE**  
BUSINESS TRAVEL

- FCM - Travel Management Company for large corporates
- Corporate Traveller - Small to medium corporate business
- FCBT - Hybrid SME business/leisure stores
- Stage and Screen - Entertainment industry
- CI Events - Events and conferences



## TRAVEL TRADE KEY PLAYERS

# Helloworld

Helloworld is now Australia's largest retail agency with 1,800 retail travel agents and 600 travel brookers in Australia and New Zealand. This includes its branded outlets, Associates, Helloworld Business Travel, Magellan Travel, The Travel Brokers (NZ), Mobile Travel Agents, the My Travel Group and ETG.

In January this year, they also finalised their purchase of Express Travel Group (ETG) which includes Select, iTalk Travel and Independent Advisors adding around 650 new members.

Helloworld half yearly results showed an impressive increase in total transaction value (TTV) by 82.3 per cent, to \$2.2 billion in 1H24, reflective of the high demand for travel and Helloworld's strong product offering and professional agent and broker networks.

Viva Holidays is continuing its hard copy brochures, which has grown to 84 pages, up from 50 in 2023/24 guide.

# TRAVEL TRADE KEY PLAYERS

## HELLOWORLD

### WHOLESALE



- Viva Holidays (formally Qantas Holidays) - Australia
- Go Holidays – New Zealand
- ReadyRooms B2B online booking system

### HELLOWORLD INDEPENDENT BRANDED



- Franchised with full Helloworld branding

### INDEPENDENT BRANDS



- MTA – Network of 460+ Mobile Travel Agents with Virtuoso membership
- High Yield Luxury & Business
- My Travel Network – Australia's largest independent network
- The Travel Brokers – NZ Home bases network with 100 senior travel specialist

### INDEPENDENT BRANDS



- Phil Hoffman Travel – Located in South Australia with 160 Staff specializing in Leisure, Corporate, Groups and MICE travel.
- HTG Hunter Travel Group has 35 stores branded as Helloworld as well as RACT, RACQ and XCrusie Trave Centre

### ONLINE



A click away



- Helloworld.com.au
  - Skiddoo – Flight Booking Site
  - Need it now – AU/NZ online only
- Helloworld refer online back to stores*

### HELLOWORLD MEMBER



- Franchised with independent branding, A Helloworld member

# TRAVEL TRADE KEY PLAYERS

HELLOWORLD

## EXPRESS TRAVEL GROUP

Purchase finalised by Helloworld in Jan 24



**Express**  
Travel Group®



- Air Ticketing



- 360 Members
- Specialists in VFR



- 250 Members
- Specialists in VFR



- Travel & Cruise Specialist
- 13 Stores



- 36 Home based agents

# TRAVEL TRADE KEY PLAYERS

## OTHER WHOLESALE

### ADVENTURE WORLD



- Adventure World Travel has over 40 years of expertise in handcrafting bespoke holidays for travellers
- Preferred with most retail

### STUBA



- Stuba is a B2B accommodation wholesaler exclusively for the trade, offering over 100,000 properties around the world, at competitive rates in real-time.

### EXPEDIA TAAP



- Expedia's Travel Agent Affiliate Program

### ENTIRE TRAVEL GROUP



- Currently Alaska only, but looking to expand into the USA

### ADVENTURE DESTINATIONS



- Customised complex itinerary development

### V TRAVEL NETWORK



- Niche wholesale package

### ROOM-RES.COM



- B2B Platform made exclusively for travel agents comparing the best net rates and commissionable rates available for hotel bookings

### REDISCOVER TRAVEL



- City Stays
- Resort Breaks
- Theatre & Music
- Unique Cruise & Rail
- Wellness

# TRAVEL TRADE KEY PLAYERS

## OTHER RETAIL

### TRAVELLER CHOICE



- Independent agencies chain
- Buy in to become shareholders with voting rights.
- Travellers Choice currently have 120+ members

### ITRAVEL



- Franchise, mobile and affiliate members.
- The network currently has 160 members

### TRAVEL MANAGERS



- The Australian home based agency arm of House of Travel (NZ)
- 468+ personal Travel Managers
- 287 RE Members of Signature Travel Network

### AMERICAN EXPRESS



- Corporate and card holder focused travel.
- Majority online, but also offer high end for Centurion and platinum card holders.
- Fine Hotels and Resorts & The Hotel Collection are American Express luxury hotel products.

# TRAVEL TRADE KEY PLAYERS

## ONLINE TRAVEL AGENTS (OTA)

### EXPEDIA



- Expedia has a variety of online platforms with broad coverage in hotels, homes/apartments as well as limited packaging with flights and attractions.
- Expedia TAAP (Travel Agent Affiliation Program)
- Stayz
- Hotels.com
- Lastminute.com.au

### TRIP.COM



- International OTA with an Australian office.
- Trip.com offer all types of travel product and heavily target the millennials with their technology, app and rewards

### WEBJET



- Strong with airline deals, & packaging with accommodation, car hire/motorhomes.
- Webjet own WebBeds, the 2nd largest and fastest growing bedbank to the travel industry (B2B only).

### QANTAS HOTELS QANTAS HOLIDAYS



QANTAS  
HOTELS



QANTAS  
HOLIDAYS

- Airline site that has expanded to include hotels, Air BnB, car hire and now moving into exclusives. Started using the
- Qantas Holidays packages into gateway cities.
- Leveraging off 15 million Qantas Frequent Flyer database

### PLAN PLAY TRAVEL



- OTA that launched in 2020
- Currently using web beds for hotel product and Viator for attractions

### BOOKING.COM



- Accommodation only, but contract direct



# TRAVEL TRADE KEY PLAYERS

## NICHE ONLINE TRAVEL AGENTS (OTA)

### GO KINDA



- Sustainability focused OTA
- Source product through Bookings.com and GDS
- Introducing direct connectivity for gateway destinations

### ZOKU



- Influence/Content creators platform for product development.

# TRAVEL TRADE KEY PLAYERS

## PACKAGE SPECIALIST – Hotels & Touring

### LUXURY ESCAPES



- Primary B2C with large Australian database
- Launched agent wholesale portal
- Offers Experiences
- Offers Flights
- Build your own itinerary planner

### TRIPADEAL



- Trip a deal is an online travel agent offering bucket list tours, cruises and hotel escapes at unbelievable prices
- 51% owned by Qantas Group

### INSPIRING VACATIONS



- Group Touring Product

### DEALSAWAY



- Travel Package Specialist
- B2C
- Best Deal, Best Prices
- Global Work & Trave

# TRAVEL TRADE KEY PLAYERS

## NICHE SPECIALIST

**CGE GOLF**



**VIVA TRAVEL**  
Wedding Specialist



**SAVENIO**  
Luxury Network



**TAG**  
Entertainment & Event



**PLANETDWELLERS**  
LGBT+ travel specialists



**SHOW GROUP**  
Entertainment, corporate  
owned by CTM



**OUT AND ABOUT TRAVEL**  
Independent boutique  
travel agency



**TRAVEL BEYOND GROUP**  
Sports & Entertainment



**CHRIS WATSON TRAVEL**  
Group & FIT



**LEGACY JOURNEYS**  
Family Group & FIT



**RIDE THE WORLD**  
Motorcycle Tour Operator



**AMTRAK VACATIONS**  
Rail Tours & Train Holidays



# TRAVEL TRADE KEY PLAYERS

NICHE SPECIALIST

NATIONAL SENIORS  
TRAVEL



TRAVEL AT 60

travelat60.

RACV



KEITH PROWSE TRAVEL  
Sports



TRAVELRITE  
INTERNATIONAL



EVERGREEN



LIBERTY TOURS



ENCOUNTER TRAVEL  
Solo Only



LETZ TRAVEL  
Sports



SPORTSLINK  
Sports



ROSS GARDEN TOURS  
Gardens



SISTERHOOD WOMENS  
TRAVEL



GATE 7

# TRAVEL TRADE KEY PLAYERS

## EDUCATION TRAVEL SPECIALIST

### EDUCATION ADVENTURES



### GET EDUCATION TOURS



### LIBERTAS TRAVEL



### STUDENT HORIZONS

**Student  
Horizons.**

### WORLD CHALLENGE



### LATITUDE TRAVEL Education & Groups



# TRAVEL TRADE KEY PLAYERS

## SKI SPECIALIST

### SKIMAX



- Skimax Wholesale and Retail

### SNO'N'SKI MY SNOW



- Sno'n'Ski Wholesale and Groups preferred with Helloworld & FCG
- My Snow – Direct to consumer

### TRAVELPLAN SKI



- Retail B2C Ski Specialist

### MOGUL SKI



- Luxury Product Virtuoso member
- Wholesale and Retail

# TRAVEL TRADE KEY PLAYERS

MEMBERSHIP PROGRAMS

SIGNATURE TRAVEL NETWORK

**Signature**  
Travel Network

VIRTUOSO

  
**VIRTUOSO.**  
SPECIALISTS IN THE ART OF TRAVEL

GATE 7



# TRAVEL TRADE KEY PLAYERS

## ATTRACTIONS AND EXPERIENCES

### VIATOR



- Viator is a global tours and attraction
- Acquired by Tripadvisor acquired in August of 2014.
- Viator.com remains the world's largest traveler booking site for tours and attractions.

### TRAVELLO



- Travello is web and App driven that focusses on tours & attractions
- Contracts direct and wholesales via Flight Centre product

### KLOOK



- Klook is web and App driven that focusses on tours & attraction.

# TRAVEL TRADE KEY PLAYERS

## META SEARCH

TRIPADVISOR



SKYSCANNER



KAYAK



TRIVAGO



# TRAVEL TRADE KEY PLAYERS

## DISRUPTORS

### I KNOW THE PILOT



- eDM for cheap flights
- 600,000 subscribers

### AIRBNB



- Sharing travel economy
- Offering lodging around the world
- Book direct or via affiliate links with Qantas as a major partner in Australia

# MEDIA **LANDSCAPE**

GATE 7

# Media Targets

Overview of the main Australian media titles

## CULTURE, TRAVEL & LIFESTYLE

**Magazines:** WHO, New Idea, Women's Weekly, Time Out, Qantas In-flight, Frankie, Woman's Day, Escape, Vacations & Travel, International Traveller, Get Lost  
**Newspapers:** Sydney Morning Herald/The Sun-Herald, The Age/Sunday Age, Daily Telegraph/Sunday Telegraph, Herald Sun/Sunday Herald Sun, The Australian, Australian Financial Review (AFR)  
**Supplements:** Traveller, Escape, Sophisticated Traveller, Explore, Stellar/Body + Soul, AFR Life & Leisure, Good Weekend  
**Online:** Broadsheet, Concrete Playground, Time Out, news.com.au, Pedestrian.tv, 9Honey, Now to Love, The Carousel, 7 Travel, POPSugar, Urban List, AU Review, Yahoo Lifestyle, Traveller, Escape, The Latch, Thrillst, Travel & Lifestyle, Flight Centre Blog, Qantas Travel Insider

## CULINARY

**Magazines:** Delicious, Australian Gourmet Traveller, MindFood, Nourish  
**Supplements:** Taste, Goodfood  
**Online:** 9Honey, Goodfood, MindFood, Yahoo Lifestyle, Delicious, Australian Gourmet Traveller

## LUXURY

**Magazines:** Vogue, Vogue Living, Elle, Luxury Travel Magazine, Harper's Bazaar, Signature Luxury & Travel, GQ, Qantas In-flight  
**Newspapers:** The Australian, Australian Financial Review (AFR)  
**Supplements:** AFR Life & Leisure, Good Weekend, Sophisticated Traveller, Q Weekend  
**Online:** Dmarge, Signature Luxury Travel, Boss Hunting, Softer Volumes, Rogue La Vie  
**Broadcast:** Luxury Escapes TV

## MEN'S

GQ, Mens Health, Man of Many, Boss Hunting, Softer Volumes, Rogue La Vie, The Versatile Gent

## PODCASTS

Meet You In The Lobby, Travelling Senorita, We 3 Travel, Flight of Fancy, Extra Virgin Travel & Lifestyle, The Thoughtful Travel Podcast, Tastebud Traveller

## GEN Y & GEN Z

Junkee, AWOL, Pedestrian, Year13, Refinery 29 Australia, Vice Australia, The Latch, Thrillst, POPSugar

## LGBTQI

A Modern Gay's Guide  
Demure  
Star Observer  
DNA Magazine  
Archer

## TRAVEL TRADE MEDIA

Travel Daily, ETB Global, Travel Weekly, KarryOn, Travel Monitor, Latte Luxury News

## FAMILY

**Magazines:** Better Homes & Gardens, Holidays with Kids, Five Star Kids, Family Travel, Australian Women's Weekly, RACQ, RACV, Woman's Day, Offspring Magazine  
**Online:** Mamamia.com.au, kidspot.com.au, Practical Parenting, Boy Eats World  
**Broadcast:** Sunrise, The Morning Show, Today, Today Extra, The Project, The Amazing Race, Travel Guides  
**Blogs:** Boy Eats World, Mum Pack Travel, Adventure, Baby! Planning with Kids, Not so Mumsy, Mum Central, Mum's Lounge, Be a Fun Mum, House of White, Raising Three Daughters, The 40 Yr Old Dad

## PASSIONS FOCUS

**Health / adventure:** Women's Health, Men's Health, Women's Health & Fitness, Adventure.com, National Geographic Traveller, Tracks, Wild, Golf Australia, Surfing Life  
**Shopping/Beauty/Design:** Harper's Bazaar, Vogue, Elle, Marie Claire, Frankie, Australian's Women's Weekly, InStyle, Grazia



GATE 7

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