

ATE 2002 OPPORTUNITIES IN NEW ZEALAND

Despite the continuing and changing characteristics of the New Zealand Industry and market, the relationship of your product with the industry and the distribution network remains of great relevance to the development of your business from New Zealand. It is important to note that this remains the same, no matter the style of your product or your target market.

NZ Market Overview

Current and ongoing changes continue in both technology and infrastructure for the industry. Further rationalisation of the distribution network has occurred and more may be expected as companies compete for market share.

Trans Tasman airline capacity continues to undergo change as the airlines juggle to meet demand and profitability. Changes to the airlines structure have resulted in airline access issues for Tasmania with a resulting impact on airfares. Short-term specials are still available from time to time as the airlines see the necessity to stimulate the market.

Currently Qantas is the only airline to be able to offer a one carrier through access to Tasmania. The airfare structure reflects this dominance by Qantas resulting in airfares to Tasmania being constructed over the gateways of Melbourne or Sydney with a domestic add on, taking the published airfare level to a similar level to that of Perth. The domestic capacity to Tasmania is now at a higher level than pre the Ansett demise in September 2001 but the cost of that access for the New Zealand traveller has increased substantially. Airfare initiatives by Qantas such as "Our World on Sale" continue to include through airfares to Hobart and Launceston at much reduced levels representing excellent value when compared to competitor beyond gateway destinations such as Adelaide, and Cairns at the same level and substantially less than Darwin and Perth.

Consolidation of distribution retail networks continues with the latest being Budget Travel who will now be incorporated within the Holiday Shoppe brand. This is perceived as a rebranding exercise with a similar strategy to that of Travel for Less being rebranded as Travel Smart.

Tasmania is not a volume destination for New Zealand wholesalers and retailers; therefore knowledge of the destination and product available is a key issue. Opportunities exist to promote Tasmanian product direct to the retail and wholesale industry, through attending scheduled trade shows such as OZ Talk, independent New Zealand sales visits, and Co-operative marketing opportunities with wholesaler programs.

OZ Talk New Zealand presents an opportunity to participate in the biggest Australian trade show outside of ATE and meet with the largest gathering of retail and wholesale agents in New Zealand, at an event organised specifically for operators to showcase their product.

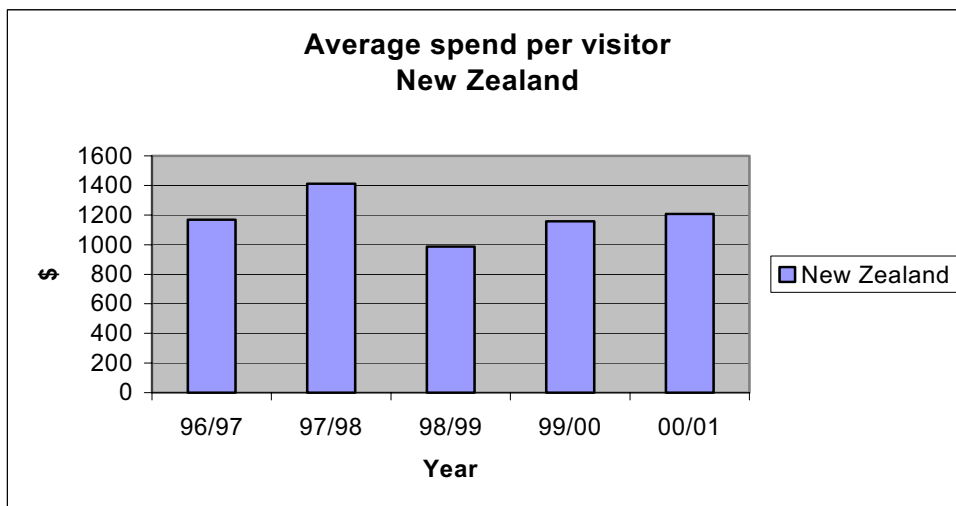
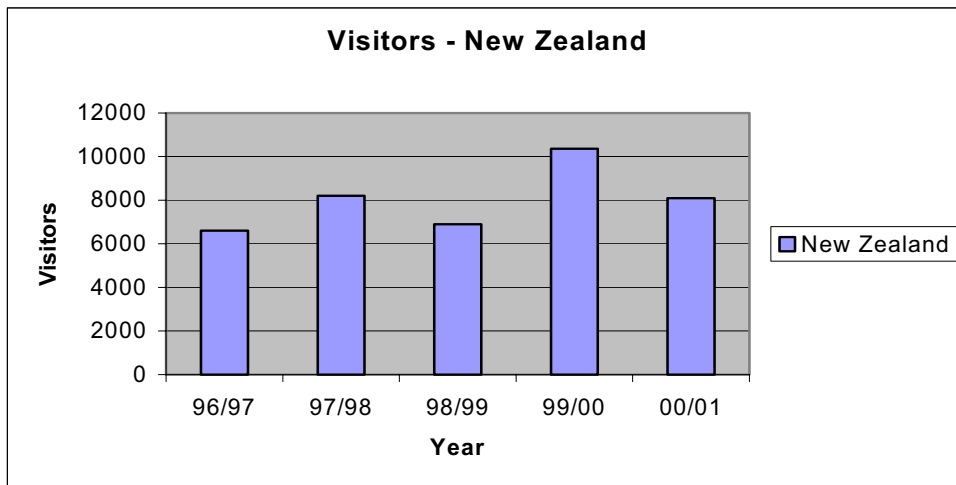
Wholesaler brochures continue to be the prime vehicle for product exposure and continued attention to relationship building between Tasmanian product and wholesalers product

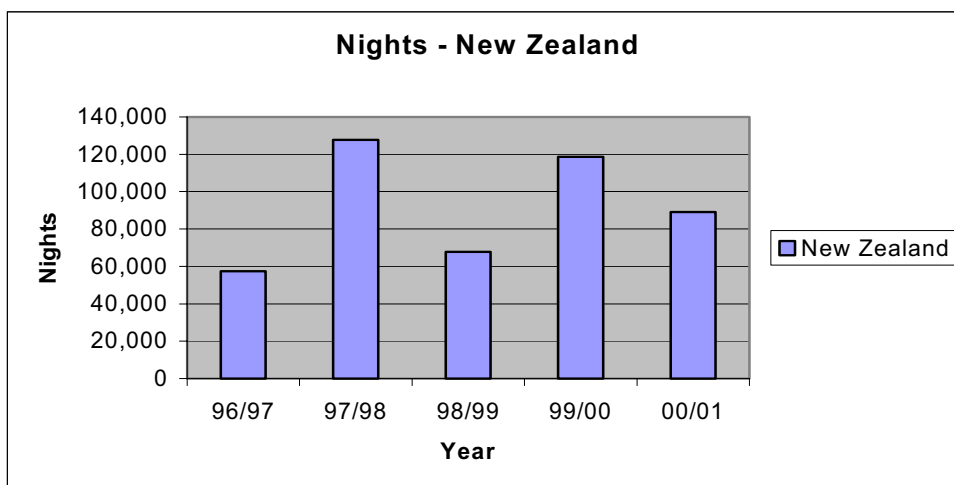
managers in New Zealand is of prime importance, to gain access to brochure inclusion and staff training for your product.

Distribution of product brochure material is available through Travel Express and Brochure Direct to ensure that product information can be distributed via the travel industry to the consumer.

Access to travel and travel information via the web is well established with only Flight Centres remaining aloof at this stage.

Arrivals to Tasmania





Disclaimer

Tasmanian Visitors Survey (TVS): Any information quoted from the tables above should acknowledge Tourism Tasmania's Visitor Survey as its source. The information contained above has been prepared by the Crown for its own purposes. It is of a general nature and should not be relied upon by others in substitution for professional advice and individual investigation. The State of Tasmania, its employees and agents will not be responsible for any loss howsoever arising from the use of, or reliance on, this information.

Note: Readers are advised to exercise caution when interpreting figures contained in this report. Information contained in the report is based on estimates from a sample survey and may be subject to chance variation, or sampling error. The smaller the estimate, the higher the proportion of sampling error. Full details are available from the Market Research section.

Top 8 New Zealand Partners ATE 2002

Name & Head Office Address	Type of Business, Brochure, Brochure production	Internet Details	Booking Distribution Channel	What they are looking for and how to work with them.
<p>GULLIVERS HOLIDAYS</p> <p>Ms Lindy Christian General Manager</p> <p>Ms Sara Collier Product Manager</p> <p>L5 Price Waterhouse Building 66 Wyndham St Auckland</p> <p>Tel: 64 9 307 1888 Fax: 64 9 307 1869 Email: lindyc@gullivers.co.nz Email: sarac@gullivers.co.nz Website: www.gullivers.co.nz</p>	<p>Wholesaler</p> <p>Retail distribution: Holiday Shop (now includes all Budget Travel offices) United Travel</p> <p>Brochure Production: Tasmania Brochure 6 pages</p> <p>Product Production: February</p>	<p>Website linked to retail distribution with password access</p> <p>Retail chains also have their own websites</p>	<p>Direct to operators or via Tasmania's Temptations</p>	<p>Gullivers currently operate on a preferred arrangement with a small number of operators who are included in their Tasmania brochure.</p> <p>Co-op marketing Dollars and / or brochure support</p> <p>Use Tasmania's Temptations for all other product</p>

<p>TRAVELPLAN</p> <p>Ms Victoria Kenny Product Manager – Australia</p> <p>Allen McLean Building 2nd Floor, 210 Oxford Tce Christchurch</p> <p>Tel: 64 3 374 0500 Fax: 64 3 374 0506 Email: vkenny@travelplan.co.nz Website: www.travelplan.co.nz</p>	<p>Wholesaler: Retail Distribution: House of Travel Brochure Production: December/January Australia 80 pages 3 pages Tasmania Branded 12 page Tasmania's Temptations brochure</p>	<p>Website linked to retail distribution with password access</p> <p>Retail chains also have their own websites</p>	<p>Direct to operators or via Tasmania's Temptations</p>	<p>Negotiated rates for direct products and possible special value added deals for tactical campaigns throughout the year</p> <p>Co-op marketing Dollars and / or brochure support</p>
<p>ESCAPE HOLIDAYS</p> <p>Ms Daryl Ann Phizacklea, Product Director</p> <p>Ms Tracey White Product Manager Australia</p> <p>7-9 Falcon St Parnell Auckland</p> <p>Tel: 64 9 309 4780 Fax: 64 9 307 1028 Email: daryl@tektravel.co.nz Email: twhite@tektravel.co.nz Website: www.escapeholidays.co.nz</p>	<p>Wholesale Retail Distribution Chains: Harvey World Travel Travel Smart (formerly Travel for Less) E – flights</p> <p>Brochure production: February Southern States 16 page brochure 3 pages Tasmania</p> <p>Branded 12 page Tasmania's Temptations brochure</p>	<p>Website linked to retail distribution with password access</p> <p>Retail chains also have their own websites</p>	<p>Direct to operators or via Tasmania's Temptations</p>	<p>Negotiated rates for direct products and possible special value added deals for tactical campaigns throughout the year</p> <p>Co-op marketing Dollars and / or brochure support</p>
<p>GO HOLIDAYS (Go International)</p> <p>Mr Scott Weatherly Product Sourcing & Development Manager</p> <p>151 Victoria St West Auckland</p> <p>Tel: 64 9 914 4040 Fax: 64 9 377 0111 Email: sweatherly@gogogo.co.nz Website: www.gogogo.co.nz</p>	<p>Wholesale Retail Distribution Chains: Flight Centres, Air NZ Travel Centres, First Travel Group</p> <p>Brochure Production: February Did not produce a Tasmania brochure last year, but will for 2002/2003.</p>	<p>Website linked to retail distribution with password access</p>	<p>Direct to operators or via Tasmania's Temptations</p>	<p>Negotiated rates for direct products and possible special value added deals for tactical campaigns throughout the year</p> <p>Co-op marketing Dollars and / or brochure support</p>

<p>INFINITY HOLIDAYS</p> <p>Ms Karen Payne Product Manager</p> <p>Ms Vicki Clague Product Manager</p> <p>Level 7, 48 Emily Place Auckland</p> <p>Tel: 64 9 352 7286 / 353 7287 Fax: 64 9 355 7225 Email: karen_payne@infinityholidays.co.nz vicki_clague@infinityholidays.co.nz</p>	<p>Wholesale Retail Distribution Chains: Flight Centres, Great Holiday Escapes, Corporate Traveller</p> <p>Brochure Production: 100 page Australia, Fiji, Cook Islands brochure.</p> <p>3 pages Tasmania</p>	<p>Intranet site only.</p> <p>Flight Centre website includes Infinity Holidays product</p>	<p>Direct to operators or via Tasmania's Temptations</p>	<p>Negotiated rates for direct products and possible special value added deals for tactical campaigns throughout the year</p> <p>Co-op marketing Dollars and / or brochure support</p>
<p>TASMANIAN TRAVEL CENTRE</p> <p>Ms Lucy Bernabei Manager</p> <p>Level 3 FAI Building 220 Queen St Auckland</p> <p>Tel: 64 9 307 6602 Fax: 64 9 307 6667 Email: lucy@satravel.co.nz</p>	<p>Wholesale / retail</p> <p>No brochure Direct Mail and Television advertising</p> <p>Specialises in special interest group tours</p>		<p>Direct to operators or via Tasmania's Temptations</p>	<p>Negotiated wholesale rates</p>
<p>ASPAC VACATIONS</p> <p>Ms Debra McCoy Product Manager</p> <p>137 Great North Road, Grey Lynn Auckland</p> <p>Tel: 64 9 916 9930 Fax: 64 9 916 9907 Email: debra.mckoy@aspacvacations.co.nz Website: www.aspacvacations.co.nz</p>	<p>Wholesale Retail Chain Distribution: Flight Centres, Air New Zealand Travel Centres, First travel Group</p> <p>Produce Brochures and flyerzooms</p>	<p>Website but no current product on offer for Tasmania</p>	<p>Direct to operators or via Tasmania's Temptations</p>	<p>Negotiated rates for direct products and possible special value added deals for tactical campaigns throughout the year</p> <p>Co-op marketing Dollars and / or brochure support</p>

TRAVEL CO NZ Ms Melanie Neish Product Manager 52 Emily Place Auckland Tel: 64 9 358 8200 Fax: 64 308 9727 Website: www.travel.co.nz	Wholesale/retail Online travel direct to the consumer but also linking to retail travel brokers	Online travel company	Direct to Operators	Negotiated wholesale rates
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ATE 2002 OPPORTUNITIES IN NEW CALEDONIA

New Caledonia Market Overview

New Caledonia is a relatively mature market supplying a growing number of high-yield travellers who seek experiences in cities and beyond.

New Caledonia is a French overseas territory, divided into three provinces: Southern, Northern and Islands provinces. Approximately 68 per cent of the population of almost 200,000 live in the Southern Province, including 100,000 in Noumea. The ethnic breakdown of the population is approximately 1/3 Melanesian (Kanak), 1/3 European (French descent) and 1/3 metropolitan French (expats), and a small number of Tahitians, Chinese and Vietnamese.

New Caledonia's largest industry is mining and smelting of nickel. Two large Canadian nickel companies (Falconbridge and Inco) have nearly completed a five year scoping analysis to assess the potential of mining projects in New Caledonia. If the US\$2.5 billion mining projects go ahead, both companies will move large numbers of Canadians each year to New Caledonia. This would create a new expat segment with potential for significant new tourism growth for Australia.

Consumer Segments

Travel trends

- French nationals (Metropolitan French) are usually posted in Noumea for government service for two to three years on attractive packages, enhanced by New Caledonia's lenient tax regime.
- Most European New Caledonians and a small proportion of the Kanak community are also relatively wealthy and enjoy high disposable incomes.
- These segments dominate the outbound travel market.
- The cost of living in Noumea is high by Australian standards. The exchange rate between the local currency, the South Pacific Franc, and the US dollar is equivalent to the Japanese Yen.
- New Caledonians receive five weeks paid holiday each year.
- Australia is the leading overseas travel destination, equal with France. Sydney and Gold Coast currently dominate travel to Australia, with many repeat visits.

New Caledonia Partners ATE 2002

Name & Head Office Address	Type of Business, Brochure, Brochure production	Internet Details	Booking Distribution Channel	What they are looking for and how to work with them.
<p>AGENCE DE VOYAGES David Guenant – Sales & Marketing Manager 14 Rue Georges Clemenceau BP 122 Noumea 98845 New Caledonia</p> <p>Tel: +68 7 280 134 Fax: +68 7 282 444 Email: brockmarketing@canl.nc</p>	Wholesale / retail		Direct	<p>Negotiated wholesale rates</p> <p>New product</p>
<p>CENTER VOYAGES – TOURAMEX Nathalie Le Baube – Operations Manager 27 Ave Marechal Foch, BP 50 Noumea Cedex 98845 New Caledonia</p> <p>Tel: +68 7 280 779 Fax: +68 7 272 636 Email: touramex@offratel.nc</p>	Wholesale / retail		Direct	<p>Negotiated wholesale rates</p> <p>New product</p>
<p>EDEN TOURS Maggy Pontoni – Product Manager P.O. Box 3707 24 Rue de l'Alma BP 3707 Noumea 98846 New Caledonia</p> <p>Tel: +68 7 252 233 Fax: +68 7 252 566 Email: eden@canl.nc</p>	<p>Wholesale / Retail Tour Operator</p> <p>Brochure production Australia brochure 1 page Tasmania August - September</p>		Direct	<p>Negotiated wholesale rates</p> <p>New product</p>
<p>UNITOURS Francoise Chenais – General Manager 32 Rue Clemenceau 2207 Noumea 98846 New Caledonia</p> <p>Tel: +68 7 241 880 Fax: +68 7 249 080</p>	Wholesale / Retail		Direct	<p>Negotiated wholesale rates</p> <p>New product</p>