

THE AMERICAS

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GENERAL MARKET OVERVIEW

UNITED STATES OF AMERICA

- Population: 305 million. Major Market Centres: California (36.7 million), Texas (24.3 million), New York (19.5 million), Florida (18.3 million), Illinois (12.9 million), Pennsylvania (12.4 million), Washington State (6.5 million), and Arizona (6.3 million).
- GDP Growth Forecast (IMF Estimates. July 8, 2009): 2008 +1.1%, 2009 -2.6%, 2010 +0.8%.
- Annual Leave Entitlement: Generally 2-3 weeks

US Economic Environment

- The first quarter of 2009 was the worst for the US economy in nearly three decades. The stock market crash, global financial crisis and consumer uncertainty about continued employment had a strong influence on North American travel patterns.
- The U.S. Commerce Department said the slippage in gross domestic product for the June quarter came after the economy was in a free fall, tumbling at a pace of 6.4% in the first three months of the year, worse than the earlier estimates.
- The latest government report shows that the rate of contraction in the US economy was better-than-expected for the second quarter of 2009, the strongest signal to date that the recession is finally winding down.
- Consumer confidence fell to its lowest level in February 2009 (25.3) but rebounded as at May to 54.9. Despite a slight dip in June, February has been considered the low point of the recession and consumers across all key regions are more confident today than they were during June 2008.
- The unemployment rate in the US rose to 9.6% in August 2009 (compared with 6.1% in August 2008).

CANADA

- Population: 33.7 million. Major Market Centres: Ontario (12.9 million), Quebec (7.7 million), British Columbia (4.4 million)
- GDP Growth Forecast (IMF Estimates. July 8, 2009): 2008 +0.4%, 2009 -2.3%, 2010 +1.6%.
- Annual Leave Entitlement: 3-4 weeks

Canadian Economic Environment

- Canada's economy grew for the first time in 11 months in June, providing hope at the end of a period that still marked the country's third consecutive quarter of economic contraction. The Canadian recession appears to have been deeper than initially thought, but June's monthly real GDP number does suggest that the recession did finally end in June.
- Canada's economy has been affected by the relatively heavy exposure to the deeply troubled energy, mining, automotive and forestry industries. Weak US demand and depressed commodity prices have hit these sectors severely, and the impact has increasingly filtered through to domestic demand. Source: EIU Viewswire, May 2009
- The Bank of Canada lowered its policy rate to almost zero and has committed to holding the rate at this level until the end of June 2010, conditional on the inflation outlook. Unemployment is projected to keep rising until early 2010. Canada's unemployment rate at the end of August was 8.7%.

USA & CANADA VISITOR SUMMARY

- The U.S. remains the fourth largest source market for travellers to Australia, with 420,100 arrivals for the year ended June 2009. The research indicates visitor arrivals have remained stagnant when compared to the year ended July 2008 figure of 424,300.
- Visitor numbers from Canada to Australia have remained unchanged in the previous year, at 114,800. Visitor nights from Canada increased by 13% compared with the year ended July 2008.
- South Australia received 45,300 North American visitors for the year ending June 2009. This is a 9% decrease on the 12 months to June 2008 (49,800 visitors). Despite this, visitor nights to South Australia increased by 1% to 607,000 compared with 600,000 for the year ended June 2008.
- South Australia received 30,700 U.S. visitors for the year ending June 2008. This is a 10% decrease on the twelve months to June 2008. US Room nights decreased by a total of 6% compared with last year.
- South Australia received 14,500 Canadian visitors for the year ending June 2008, representing an 8% decrease from last year. Visitor room nights from Canadian visitors increased 11% (283,000) compared to the previous year.
- Package expenditure in South Australia for US visitors was reported at \$35m for the year ended June 2008 compared with \$38m in the previous year. Package expenditure in South Australia for Canadian visitors was reported at \$21 million for the year ended 2008, compared to \$18 million in the previous year. Expenditure for the North American market has therefore remained steady compared to the previous year with a total of \$56 m.

Aviation Market

- Airfares in the US market have been extremely competitive for travel to Australia over the last year. This combined with increased capacity from new airlines servicing routes to Australia including Emirates, Delta and V Australia, is improving Australia's accessibility.
- At the height of the global financial crisis, operators reported significant reductions in demand for premium economy, business and first class services and consequently prices dropped substantially.
- V Australia commenced daily services from Sydney to Los Angeles on 21 March 2009 and services between Los Angeles and Brisbane on April 8. Services from Los Angeles to Melbourne will commence twice weekly from 1 December 2009. V Australia has also signed interline agreements with Virgin America and Delta and codeshare agreements with Emirates.
- Delta began daily non-stop services on the Sydney to Los Angeles route from 1 July 2009. Delta Air Lines and Virgin Blue announced in July that they plan to seek regulatory approval to form a joint venture that will expand both carriers' reach between the U.S. and Australia and the South Pacific.
- Qantas introduced A380 flights from October 2008 and currently operates three flights a week from Sydney and two per week from Melbourne. By November, Qantas will operate daily A380 services between Los Angeles and Sydney and will increase Los Angeles to Melbourne services from two to three A380 flights per week. In a response to the market environment, Qantas has held global two-for-one sales with deals available in Economy, Premium Economy and Business.
- There were news reports that Air Canada may scale back its Australian operations after the competition regulator rejected its proposal for a "co-operation agreement" with Air New Zealand on the Sydney-Vancouver route. After a shaky first quarter on the Australia route, Air Canada forecast stronger sales in the Canadian summer.

NORTH AMERICAN WHOLESALE ACTIVITIES

- SATC was a platinum partner in the Stella Select program for 2008/2009. The sponsorship entitled SATC to priority picks in areas such as sales and marketing events, incentives with staff, media, famils, website features and e-blasts to the Stella agent network. In addition to this, SATC was a partner in the Stella “Australia” the movie campaign.
- SATC, Stella Travel Services and Qantas launched a major three month campaign in September during the North American Corroboree event. The campaign is using Kangaroo Island as the predominant theme with a ‘free flight’ to KI as the value proposition (on top of the Aussie Airpass including SA).
- At the start of the year, SATC participated in Down Under Answer’s ‘Release your Inner Australian’ that leveraged the publicity and promotion surrounding “Australia” the movie. DUA hosted a series of movie nights in partnership with preferred travel agents and held sweepstakes to build consumer databases.
- In return for exclusive wholesaler presence for the launch of the North American southaustralia.com site, Down Under Answers created eight packages revolving around the wildlife, outback and wine themes and publicised these through consumer and trade e-blasts and advertisements in DUA’s inaugural consumer newsletter.
- SATC is currently participating in DUA’s I Love Aussie campaign that has the objective to promote affordable value-priced air/land vacation to North American consumers via online ads, text ads, banner ads, travel agent distribution and consumer databases.
- Swain Tours has continued to focus on leveraging relationships with the Virtuoso consortium in 2009, including a feature in Virtuoso’s Best of the Best publication. SATC is also involved in the soon to be launched direct mail and online campaign featuring three other state partners and V-Australia. This campaign will target high-end American Express card holders and their database of past travellers for an Australian vacation.
- Goway’s primary marketing revolves around their consumer magazine called “Globetrotting” which is distributed to their database of clients (325,000 copies). SATC once again contributed to the publication this year, which is directed at previous and potential long haul travellers.

OTHER KEY TRADE MARKETING ACTIVITIES

- SATC participated in the Project Fox campaign that aimed to leverage the publicity and interest surrounding “Australia” the movie. The campaign included features in newspapers such as the Metro, Toronto Star and Gazette, extensive articles regarding the Flinders Ranges, Barossa and Kangaroo Island and a promotion with Jacob’s Creek that included promotional neck tags and a sweepstakes for a trip to Australia including the Barossa.
- SATC has also recently committed to the US \$2.2m ‘It’s Time for Australia’ campaign which will deliver compelling reasons to the ‘Experience Lead Luxury’ consumer to travel to Australia now. Through media, PR, and advocates, coupled with great offers and packages, the aim is to get the luxury segment on a plane in the next 12 months. The driver will be connecting people’s passions with what Australia can deliver – great nature, food & wine and adventure for the right price. Kangaroo Island, Flinders Ranges and Barossa will be the key features of the campaign for SA elements. TA, TQ, TVIC and Swain Tours are the other partners in the campaign.

- Adelaide played host to Corroboree North America for the first time ever from September 11-13. A record number of South Australia operators (19) attended the event that showcased the state to over 150 Aussie Specialist agents and key North American wholesale partners. SATC worked closely with Tourism Australia to finalise the event schedule and ensure South Australian theming aspects were delivered during the event. The program included an opening reception at the National Wine center, dinner at Penfolds Magill Estate and a gala dinner at the Adelaide Town Hall. Further to this, over 100 agents participated in group famils in South Australia pre/post the event with many others organising independent visits around South Australian regions.
- SATC in partnership with Air New Zealand was featured in the COSTCO Member Savings Guide July 2009 issue. There were one million copies printed, with 100,000 mailed to Executive Members and American Express card holders on the west coast. The joint partnership marked the first time COSTCO have done a dual destination itinerary. An 8 night package featuring Auckland, Adelaide, Adelaide Hills and Kangaroo Island was featured.

KEY CONSUMER MARKETING ACTIVITIES

- SATC hosted a press conference and a VIP wine reception for over 400 guests following the G'Day USA Adelaide Symphony Orchestra event in January 2009. Approximately 1000 people attended the concert, which showcased images of South Australia around the Royce Hall auditorium. The reception also publicised the State's key tourism experiences through a brief presentation and rolling video.
- SATC partnered with the Lark Creek Restaurant Group and conducted a month-long consumer event at the group's various restaurants in the San Francisco Bay Area. In addition to featuring a special 4-course menu of South Australian food and wine at each of their restaurants throughout the entire month of September 2009, a variety of other events were also arranged with influential groups such as the San Francisco Professional Food Society, Zagat Presents, Macy's Cooking Demo, Commonwealth Club and other media opportunities. Each of these events sold out, and helped generate media attention surrounding the promotion.
- Alisal Ranch in Solvang played host to the second Outback at the Alisal Weekend on September 17-20. This three-night, four-day event showcased Australian wines with Dean Hewittson from Hewittson Wines and Australian foods with celebrity chef Curtis Stone. The weekend educated the group of over 30 high end consumers about the Great Australian Outback Cattle Drive and key tourism experiences within South Australia. A trip for two on the Cattle Drive was also drawn during the weekend's activities.
- SATC is leveraging additional opportunities to help generate awareness of SA as a travel destination, and has partnered with Miramax and QF to host a sweepstake surrounding the launch of "The Boys Are Back" film in the US market.

MAJOR PLANS FOR 2009/10

Trade Activities

- SATC North America will commit to large scale cooperative marketing activities with key distribution wholesalers including Stella, Swain Tours, Down Under Answers and Goway Travel, that will aim to leverage these brands to maximise marketing effectiveness and reach. SATC will also be a major partner in Tourism Australia's 'It's time for Australia' campaign, featuring food & wine and nature & adventure, being the first significant investment in a TA led campaign for a number of years.
- Other opportunities are also being developed to promote events such as the Tour Down Under, Tasting Australia and the Outback Cattle Drive.
- The SATC and Fosters Wine Group are currently developing a proposal for SA specialist agents to pair up with Fosters Wine Group to promote South Australian tourism experiences. The initial step of this program will be a South Australian Wine Travel Specialist webinar series that will educate agents on key wine regions and Fosters travel experiences. This will then qualify agents to participate in various Fosters wine tasting and promotional events. This concept will be trialed early in 2010.

Consumer Activities

- The SATC will continue to direct significant efforts to building a database of consumers through web activity, various consumer promotions and public relations activities. A number of intimate consumer nights aimed at educating travellers about visiting South Australia will be conducted in partnership with wholesalers and key South Australian specialist agents.
- SATC North America will participate in the Australia Week activities planned for January 2010 in Los Angeles and New York (and possibly San Francisco).

KEY CHALLENGES

- The United States and Canada are still feeling the effects of the global financial crisis that was instigated by the sub-prime mortgage crisis in the US. Most economic forecasters believe that the economy has already bottomed out and that a gradual improvement in economic conditions is likely. Having said this, unemployment remains high in many areas and consumer confidence is still relatively low. Anecdotal reports from travel partners suggest that there is an increased confidence from consumers in the leisure travel market, however, bookings remain sporadic and the timing of a substantial rebound is unclear.
- One of the major challenges in the travel market over the last year has been the rise of price driven promotions highlighting short and long haul regions. Many travel trend experts agree that the struggling economy isn't necessarily preventing the majority of Americans from planning vacations, but they are looking for bargains, staying at more affordable accommodations and sticking closer to home. With so many deals on the market, consumers are spending more time analysing the real 'value' of deals, but are finding it difficult to determine which the best offer is and whom to trust. Consequently, promotional activities and strategies have become critical for the travel trade, but convincing consumers of the price competitiveness and value of Australia remains a challenge.
- The increased competition in the Australian aviation market during the economic downturn has made maximising passenger loads a challenge for the airlines. This has resulted in a number of airlines and wholesalers narrowing their promotional focus to price points and packages to the Eastern state gateways. Coupled with Tourism

Australia's Aussie Week promotional concept that has been confirmed for a further year, the message of dispersal to other regions such as South Australia is made more challenging.

- Many of SATC's key wholesale partners continue to expand their portfolios to destinations such as Africa, Asia and the Middle East. The price attractiveness of Australia has also varied over the last year due to the large shifts in the value of the Australian dollar in relation to the Greenback. Retaining market share from our key partners becomes a greater challenge with their increased product range of price competitive destinations. It is also possible that an increase in airfares from record lows could amplify this effect.
- Given the current economic situation of many Americans, it is not as fashionable as it once was to flaunt excess and wealth. With Tourism Australia and SATC's focus on the 'experience-seeker' segment and on higher-yield visitors, the target segment has narrowed in recent times and is expected to remain so until economic conditions start to improve.

KEY OPPORTUNITIES

There are a number of compelling reasons for South Australian operators to be involved in marketing activities in the U.S. and Canada over the next year.

The general consensus is that the worst of the economic conditions in North America is over and that consumers are gaining confidence once again. Stability is also returning to the travel industry and staff cuts and company closures have generally ceased. This provides an ideal time to reinforce South Australian product messages to the trade, especially in cases that staff roles have changed for our key distribution partners.

SATC is participating in numerous large scale cooperative campaigns over the next six months with key wholesale partners and Tourism Australia. Most of these campaigns involve limited state partners, providing South Australia the ideal platform to showcase our unique selling points. These campaigns will focus on our core Wildlife, Outback and Wine messages and in-market visits will be critical in maximising the success of the campaigns.

Adelaide has recently hosted Tourism Australia's Corroboree 2009 event, which was successful in showcasing the city and key tourism regions to numerous retail agents and wholesalers. It also exposed the trade to a record number of South Australian suppliers along with key SA tourism themes. This coupled with the fact that Adelaide that will play host to a number of Aussie Specialists agents during ATE 2010, will greatly raise the profile of the state over the next year. Participation in North American marketing activities will assist in converting the great interest and enthusiasm received for the destination into future bookings.

The SATC will also continue to pursue an aggressive public relations and media strategy over the next year. The profile of South Australia is growing amongst trade and consumer media and this is resulting in more consumers requesting inclusion of South Australian experiences when communicating with the travel trade. Cooperation and assistance with these familiarisations is always appreciated.

Success in North America is contingent on a long term commitment to the market. Successful operators continually revisit and remind the trade of their unique and world-class experiences. This remains consistent despite the prevailing economic and travel conditions.

ACTIVE INBOUND COMPANIES IN THE REGION

- AAT Kings
- Australian Pacific Touring
- Australia One
- Australian Outback Travel
- ATS Pacific
- Australia 2 See
- Beehive
- Epic Private Journeys
- Goway Travel
- Pan Pacific
- Southern Crossings
- Southern World
- Qantas Holidays
- Swain Tours

A LIST WHOLESALERS

Company	Key contacts	SA Product Featured	Comments
Stella Travel Services (LA) (Travel 2, Qantas Vacations, Travelscene)	Michael Londregan Mark Punshon Amanda Behre Monica Wilson Sarah Henderson	Brochure produced in October Adelaide/ KI / Barossa/ Flinders / Coober Pedy/ Clare Valley / Fleurieu/ / Adelaide Hills/ Murray River	<ul style="list-style-type: none"> • SATC is participating in a significant SA focused campaign from Sep – Dec 2009. • The company is continuing with the Stella Select program for 2009/2010, limiting training opportunities to their preferred suppliers. • Stella are planning a number of large scale campaigns with STOs and NTOs in the next year. • Hold a strong relationship with Qantas Airways. Qantas Holidays is their ITO
Swain Australia Tours / United Vacations (Philadelphia)	Ian Swain Sarah Miller Diana Swain	Brochure produced in November 75% Australian content. Adelaide / Barossa / Clare Valley / Fleurieu / Kangaroo Island / Coober Pedy / Flinders / Fleurieu Peninsula / Limestone Coast	<ul style="list-style-type: none"> • Contracted wholesaler for United Airlines. • Strong relationship with Virtuoso affiliated agents • Very strong supporters of SA • Mostly FIT travel • Focus is luxury, but will accommodate any budget • Swain Tours have ITO operations in Sydney.
Down Under Answers (Seattle)	Kirk Demeter Kerryn Cook Amber Cummings Margot Nahay Brooke Castor	Brochure produced in December 70% Australian content. Adelaide / Adelaide Hills / Barossa / Kangaroo Island/ Fleurieu / Flinders Ranges/ Coober Pedy. DUA have an Australia/New Zealand/ South Pacific brochure, an APT and AAT Kings wrap brochure.	<ul style="list-style-type: none"> • Are strong supporters of SA • Moderate to deluxe travel • Share the same office as Abel Tasman Tours • Strong relationship and business with Premier Aussie Specialists. • Use AOT as their primary ITO
Goway Travel (Toronto)	Bruce Hodge Emma Cottis	Brochure produced in November 70% Australia content. Adelaide / McLaren Vale / Adelaide Hills / Barossa / Kangaroo Island / Fleurieu Peninsula / Flinders / Clare Valley / Coober Pedy	<ul style="list-style-type: none"> • Sell all levels of travel and are recognised for their groups travel department • Great supporters of SA • SATC has supported Globetrotting Newsletter which reaches 325,0000 readers • Have ITO operations based in Sydney.

B LIST WHOLESALERS

Abel Tasman Tours (Seattle)	Janelle Cook Kim Callahan	FIT Brochure – 5 pages on SA including Adelaide, Coober Pedy, Barossa, KI and Ghan, Escorted (APT Wrap) Adelaide/KI/Barossa/ Coober Pedy	<ul style="list-style-type: none"> • FIT's • Middle-market traveller • Are strong supporters of SA • Recently took a famil to the Murray River region • Share same office as DUA
Absolute Travel (NY)	Ken Fish	25% Australian content Adelaide/ Kangaroo Island/ Barossa/ Flinders Ranges	<ul style="list-style-type: none"> • FIT only • Specialise in luxury and romance • Include SA in about 40% of their travel programs
Anderson Vacations (Calgary)	Corey Marshall Karen McCardle	50% Australian product in brochure Adelaide / Barossa / McLaren Vale/ Kangaroo Island / Murray River/ Limestone Coast/ The Ghan	<ul style="list-style-type: none"> • Launched their South Pacific program last year • FIT and escorted holidays • Use House of Travel as inbound company
ANZCRO (Seattle)	Mandy Mathis Dan Knutzen	90% Australian content in Australian & Pacific islands brochure. Adelaide/ Barossa/ Kangaroo Island/ Flinders Ranges/ Murray River	<ul style="list-style-type: none"> • Specialise in FITs • Owned by Guthrey's New Zealand, but head office is based on the Gold Coast
Aspire Downunder (NY)	Sharon Tidbury Phil Tidbury	55% Australian content in FIT brochure. Use an APT wrap brochure and ATS Australia White Label FIT brochure Adelaide / Barossa/ Kangaroo Island / Flinders Ranges	<ul style="list-style-type: none"> • Specialises in FIT for mid-higher range traveller. • Aspire focuses on New York, New Jersey and Connecticut markets. • Focus on consumer direct with an emphasis on web and classified advertising.
Brendan Tours (LA)	Don Cooper Todd Ney Gordon Dirker	80% Australian content. Adelaide/ Barossa / Clare / Flinders / Coober Pedy / Kangaroo Island /	<ul style="list-style-type: none"> • Sell worldwide travel • Work closely with retail travel agents • Cater for all budgets • 50% of business is FIT • Part of the TravCorp portfolio
Boomerang/ Holiday House (Toronto/Vancouver)	David Boigne Margaret Meers	Brochure produced in February 50% Australian content in Australian & Pacific islands brochure. Features Adelaide/ Barossa/ Kangaroo Island/ Limestone Coast/ Coober Pedy	<ul style="list-style-type: none"> • Boomerang Tours is a result of a merger with Holiday House South Pacific in Vancouver • They are the second largest FIT wholesaler in Canada.

Classic Vacations (San Fran)	Joelle Arriola Yvette Broussard	70% Australian content. Adelaide, Barossa / Kangaroo Island	<ul style="list-style-type: none"> • New brochure launched in August • Specialise in deluxe FIT travel • South Pacific product launched in 2007 • Book direct
Collette Vacations (Rhode Island)	Dan Sullivan Jr Christine Alestra	Brochure has 80% Australian content. South Australia included in two out of the seven Australia/NZ featured tours. Adelaide/ Barossa / Coonawarra / Ghan	<ul style="list-style-type: none"> • Operates group escorted vacations in Australia • 60% of business is group direct/wholesale and 40% is retail. • Approx 4,000 pax to Australia
Costco Wholesale Travel (Seattle)	Rena Peterson Susie Slappey	Brochure has one dedicated Australian page with 5 Australian itineraries. One of the packages includes Kangaroo Island. The brochure is updated biannually.	<ul style="list-style-type: none"> • Large consumer database of subscribers - 28 million; 500 warehouses across the US. • SATC participated in July issue of member sales guide with 1,000,000 copies printed.
Downunder Endeavors (Chicago)	Corinne Goodman	No brochure	<p>Target:</p> <ul style="list-style-type: none"> • FIT • Honeymoon • Niche Groups
GOGO Worldwide Vacations (New Jersey & Vancouver)	Dean Smith Beth Kaplan	Brochure has 60% Australian content. Adelaide/ Barossa / Kangaroo Island / Ghan	<ul style="list-style-type: none"> • Flight Centre purchased GoGo Worldwide Vacations and Liberty Travel. • Australian product range and brochure launched in September 08 • Are launching in the Canadian market as the rebranded Infinity Holidays
Kangaroo Tours, (Brazil)	Craig Bavinton	50 % Australian content. Adelaide / South East / Kangaroo Island	<ul style="list-style-type: none"> • Top selling Australian tour operator in Brazil
Koala Tours (Seattle)	Dom Pitteri	70% Australian content Adelaide / Kangaroo Island / Barossa / The Ghan	<ul style="list-style-type: none"> • Focus on deluxe FITs • Good supporter of SA • Receives referrals as a major source of business.
SITA World Tours (LA)	Laudie Hanou Caroline Kenney Susan Neva	No Brochure Website includes Adelaide/ Kangaroo Island/ Barossa/ Flinders	<ul style="list-style-type: none"> • Moderate to Deluxe travel

Travel Impressions/ AMEX Vacations (NY)	Stephen McPartland Laura Demaio	Travel Impressions are planning to release their Australian program during the fourth quarter of 2009. This has been delayed for some time.	<ul style="list-style-type: none"> • Will cater to Deluxe market • ATS Pacific will be the inbound operator.
Springboard Vacations (LA)	Warren and Ruth Grau	60% Australian content. Adelaide / Adelaide Hills / Kangaroo Island / Barossa / Clare Valley / Ghan	<ul style="list-style-type: none"> • Focused on deluxe themed vacation packages and boutique experiences. • Have separate brochures named 'Hip Places and Cool Adventures', 'Cool Capers for Kids' and '10 Sexiest Places'. • Great supporters of SA

For further details, please contact the SATC Office in Los Angeles on email john@southoz.com. Alternatively, visit www.coastnorthamerica.com.